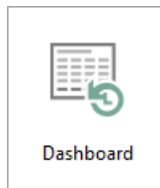


Dashboard

Last Modified on 21/08/2024 11:45 am AEST



The instructions in this article relate to **Dashboard**. The icon may be located on your [StrataMax](#) or [GLMax Desktop](#) or found using the [StrataMax or GLMax Search](#).

The **Dashboard** uses key data sources and offers a quick view of important information for a single building or the whole portfolio, with the functionality to drill down to view source data.

A company view is also available to provide an overview of portfolios, won and lost buildings/lots and a breakdown of income.

StrataMax Data Dashboard Overview

The **Dashboard** is able to be setup based on key data sources and other variables such as number of days to ensure it provides the quick overview required for the efficient management of a portfolio with the functionality to drill down to view source data that will include the coloured background based on the setup.

Dashboard for Users



Dashboard for Administrators



In order to refresh the Dashboard items, select another building from the *Building Selector* drop-down menu on the StrataMax desktop, then select the previous building again.

Dashboard Video

Data Sources | BCMax

Data from the following areas can be configured in StrataMax to display on the desktop or within the **Dashboard** icon. If a **Dashboard** icon is greyed out / cannot be accessed this means the user does not have the appropriate security permission allowed; the required security permission is listed below in brackets where applicable.

To see *Data Sources* available in **GLMax**, see the [GLMax Data Sources](#) section below.

- Days Until Struck Levy Due (Security permission: Levy Balance Control Report).
- Days Until Insurance Due to Expire (Security permission: Insurance Info Extract).
- Buildings Not Rolled.
- Bank Rec not Processed or Unbalanced (Security permission: [Bank Reconciliation Report](#)).
- No. Days Oldest Payment Remains Unpresented (Security permission: [Bank Reconciliation Report](#)). Can be configured to display cheque payments only, and only unprinted.
- No. Days Oldest Receipt Remains Unpresented (Security permission: [Bank Reconciliation Report](#)).
- Buildings with Unsaved BAS.
- Total Active Lot Count - observes the 'Number of Lots (Standard)' field in [Building Information](#).
- Quotes - Outstanding or Unreceived (Security permission: Access to [TaskMax](#)).
- Work Orders - Unfinalised. Observes the date in the *Finish* field in the job. If the date is in the past and the job status has not progressed to *E-Finalised* it will be counted. (Security permission: Access to [TaskMax](#)).
- Levies Not Printed (Security permission: Levy Balance Control Report).
- Contract Registry Expiry - this can be filtered by Contract Category.
- Management Fee Expiry - observes the *Termination Date* in management fee items in [Management Fees Setup](#); this can be filtered by *Invoice Code*.
- Arrears Budget Percentage - provides the percentage of arrears outstanding compared to the budget for the income accounts set for levies. Other arrears, overdue interest, and part-paid levies are not included in the percentage calculation. GST registered buildings that use a 'Net' reporting style will add GST to the total budget amount for reporting.
- SCM Accounts not added to StrataMax - Reports any SCM accounts not set up in a building in [Bank Account Setup](#).
- Invalid SCM Bank Accounts – Alert on any buildings with SCM Accounts that do not exist in SCM for the drive.
- Roll Unprocessed Submissions - The tile will show any unprocessed [Roll Submissions](#) when selected. The data can also be exported to Excel.
- Data Health - StrataMax is able to configure various data tables to automatically delete or archive data. Refer to our configuration and setup information on the [Data Maintenance](#) article.
- Maturing Investment Accounts, which applies to investment bank accounts, offers the 'Days before maturity' field, observing the *Maturity Date* field in [Bank Account Setup](#) or in the [Process Bank Statements](#) /

[Other Investment Accounts](#) screen.

- Strata Hub AGM Report monitors whether or not data has been uploaded to [Strata Hub](#) within 3 months of the last AGM. It will display buildings where reporting has exceeded the configured limits since last AGM date.
- [Searches](#) available in StrataMax can also be added to a users Dashboard

The title of each report can be modified to best describe the data set and multiple versions of reports can be added. For example, a chart can be added to show how many days a payment has remained in the [Bank Reconciliation](#) not yet presented; this can be configured to include the entire portfolio, and for a single building.

Displays Types

There are four *Display Type* options for StrataMax Reports; *Traffic Light*, *Single Number*, *Radial Gauge*, and *Radial Gauge Low High*.

Traffic Light

The *Traffic Light* display allows a *Lower Limit Value* and an *Upper Limit Value* to be entered:

- The red *warning* light displays if the set number of items or days for the lower limit is *exceeded*.
- The yellow *attention* light displays if the set number of items or days is *between* the lower and upper limits.
- The green light displays if the upper limit is *adhered* to.

If multiple buildings are set up for the **Dashboard** item, the display will be based on the building with the lowest limit, and the icon can be clicked to view the source data, which will also be coloured based on the limit's setup.

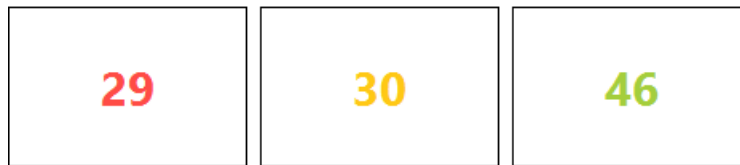


Single Number

The *Single Number* display allows a lower and upper limit value to be entered. The number will be coloured based on the limits:

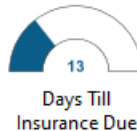
- The red *warning* number displays if the set number of items or days for the lower limit is *exceeded*.
- The yellow *attention* number displays if the set number of items or days is *between* the lower and upper limits.
- The green number displays if the upper limit is *adhered* to.

The display will be based on the building with the building with the lowest limit, and the icon can be clicked to view the source data, which will also be coloured based on the limits setup.



Radial Gauge

The *Radial Gauge* display allows a *Lower Limit Value* and an *Upper Limit Value* to be entered. The needle will point on the gauge based on the number of items or days of the source data and the range of days entered as the limits. The gauge will also display a number which will be based on the lowest limit building and the icon can be clicked on to view the source data that will also be coloured based on the limits setup.



Radial Gauge Low High

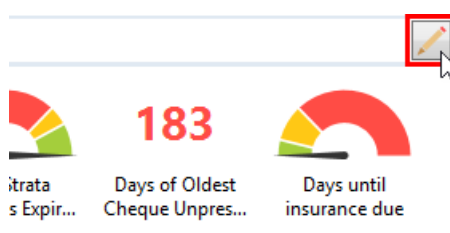
The *Radial Gauge Low High* display allows a *Minimum Value*, *Lower Limit Value*, *Upper Limit Value*, and a *Maximum Value* to be entered. The needle will point to the red portion of the gauge if the set number of items or days for the minimum limit is exceeded or is below the Lower Limit. The needle will point to the yellow portion of the gauge if the set number of items or days is between the lower and upper limits and a green if the upper limit is adhered to. If multiple buildings are setup for the Dashboard item, the display will be based on the lowest limit building and the icon can be clicked on to view the source data that will also be coloured based on the limits setup.



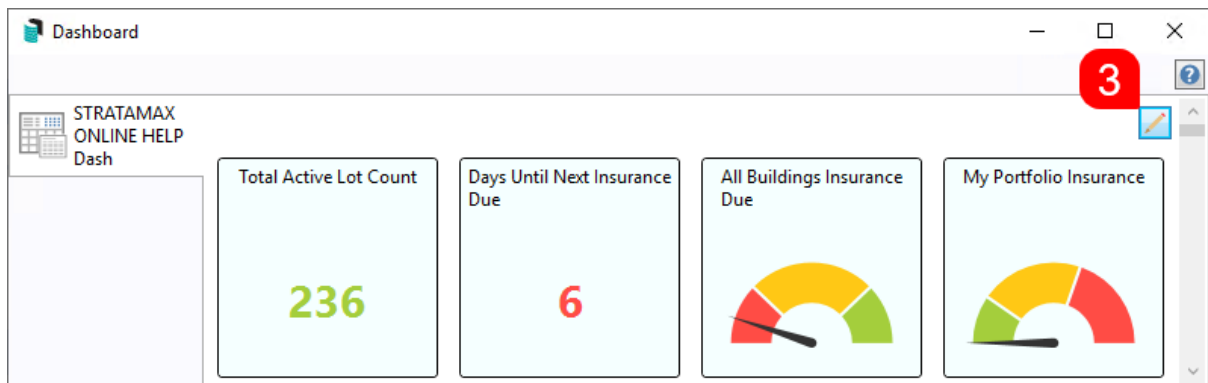
Setting Up BCMAX Dashboard Items

This section provides all the required steps to set up a *Dashboard Item*.

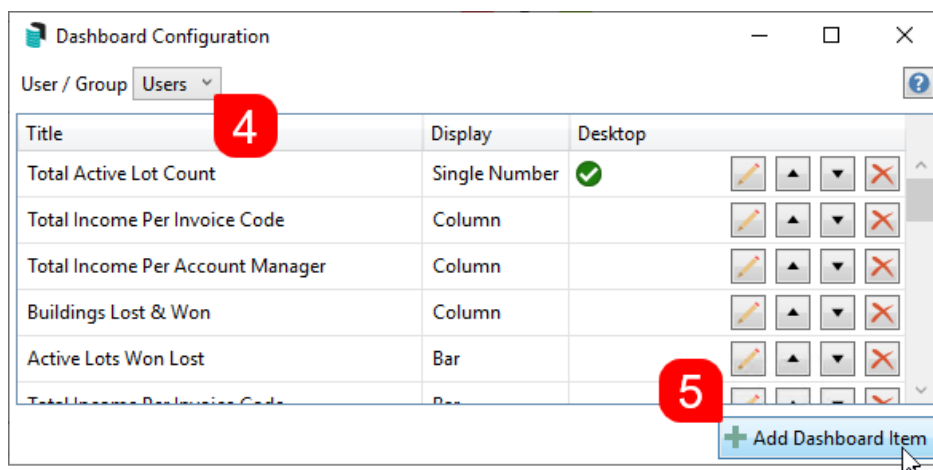
1. When adding *Dashboard Items* to an existing *Desktop Group*, click the Desktop Group's *Pencil* button in the top right instead and go to [step 4](#) below. If you are setting up a new Dashboard group, you must open the **Dashboard** menu by clicking its icon on the StrataMax or GLMax desktop or using the *Search* field in the top left of the BCMAX or GLMax desktop.



- When opened, any existing *Dashboard Items* will be displayed.
- Click the *Pencil* icon to open the setup.



- Click the *User / Groups* drop-down to select which user or user group the *Dashboard Item* will be available for.
 - Depending on which user or group is selected, the list of existing *Dashboard Items* will change.
- Click the *Add Dashboard Item* button.



- The Dashboard Item's configuration window will appear. Click the *Report* drop-down menu to select the source data.
- Click in the *Display Title* field and change the title if required.
- Select from *Filtered Buildings* to display '*All Active Buildings*', '*My Buildings (Account Manager)*' or '*Current Building*' or '*Management Office*'.
 - '*My Buildings (Account Manager)*' relies on the user name in **Security Setup** matching the user name entered in **Account Manager Edit** for the Account Manager.
 - Additional Filters may appear when particular data sources are used. Management Fee Expiry will allow a single Invoice Code number to be entered in 'Filter Invoice Code', if no Invoice Code is entered the results will be based on all Invoice Codes. Contract Register Expiry will allow a single Contract Category to be entered, if no Contract Category is entered the results will be based on all Contract Register categories.
- The *Management Office Filter Buildings* field is used when the *Filter Buildings* drop-down is set to

'Management Office'. This field observes the *Management Office* field in the **Building Information**, so check there for the possible values, then type in the required Management Office.

10. Select the *Display Type* drop-down menu.
11. Tick to *Show on Desktop* if required and set any other relevant configuration options; if not ticked to display on the Desktop the icon will only display when the Dashboard icon is clicked on.
12. Enter the required values (*Minimum, Lower, etc.*).
13. Check that the *Preview* looks the way required.
14. Click the *Save* button, and the *Dashboard Item* will be added to the list for that user or group.

Dashboard Configuration

Report

Days Until Struck Levy Due

Display Title

Days Until Struck Levy Due

Number of days till the oldest levy which has been struck but not generated

Filter Buildings: Management Office

Management Office Filter Buildings Value

Display Type

Radial Gauge Low High

Show On Desktop

Minimum Value	Lower Limit Value	Upper Limit Value	Maximum Value
0	30	45	80

(where limit is the number of days till next levy due)

Preview

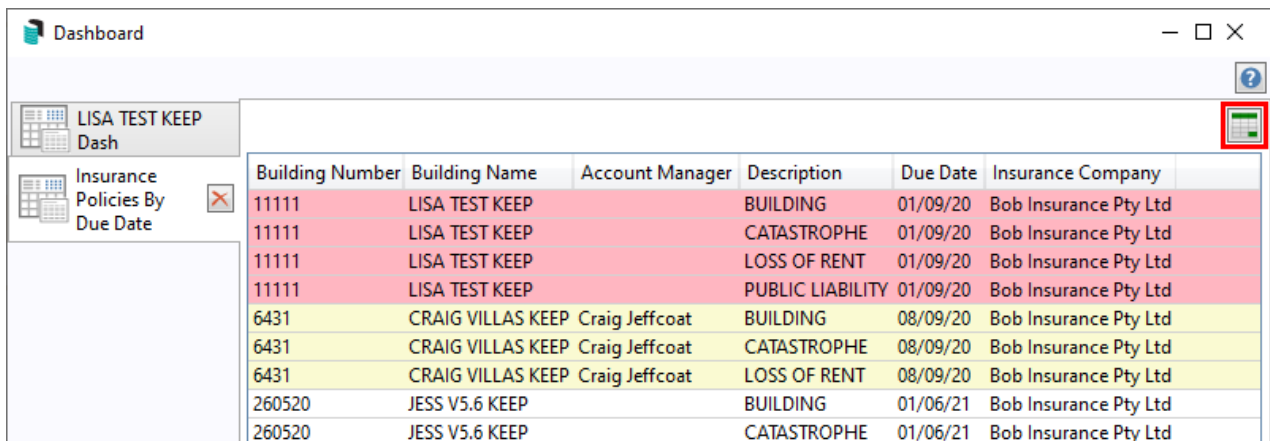
Save

15. Further Dashboard Items can be added, or close the Dashboard, and if the *Show on Desktop* checkbox was ticked, the Dashboard Item will automatically appear either:
 - A new Desktop Group called '**Dashboard for *user or group name***'
 - or
 - In an existing *Desktop Group* for the user name or group selected in [step 4](#) above.

Drill Down

All *Dashboard Items* can be clicked to reveal their source data. Any data that is within the limits will be highlighted with a colour based on the setup. Results can be exported to *Excel* by clicking on the Excel icon in

the top right.



Building Number	Building Name	Account Manager	Description	Due Date	Insurance Company
11111	LISA TEST KEEP		BUILDING	01/09/20	Bob Insurance Pty Ltd
11111	LISA TEST KEEP		CATASTROPHE	01/09/20	Bob Insurance Pty Ltd
11111	LISA TEST KEEP		LOSS OF RENT	01/09/20	Bob Insurance Pty Ltd
11111	LISA TEST KEEP		PUBLIC LIABILITY	01/09/20	Bob Insurance Pty Ltd
6431	CRAIG VILLAS KEEP	Craig Jeffcoat	BUILDING	08/09/20	Bob Insurance Pty Ltd
6431	CRAIG VILLAS KEEP	Craig Jeffcoat	CATASTROPHE	08/09/20	Bob Insurance Pty Ltd
6431	CRAIG VILLAS KEEP	Craig Jeffcoat	LOSS OF RENT	08/09/20	Bob Insurance Pty Ltd
260520	JESS V5.6 KEEP		BUILDING	01/06/21	Bob Insurance Pty Ltd
260520	JESS V5.6 KEEP		CATASTROPHE	01/06/21	Bob Insurance Pty Ltd

Troubleshooting

Days Until Struck Levy Due will identify levies if they were not generated or not marked as generated as part of the new building setup process. These levies should be investigated to determine if they should have been generated and if not the levy should be marked as generated using the [Set Levy Notice Date](#) process if appropriate.

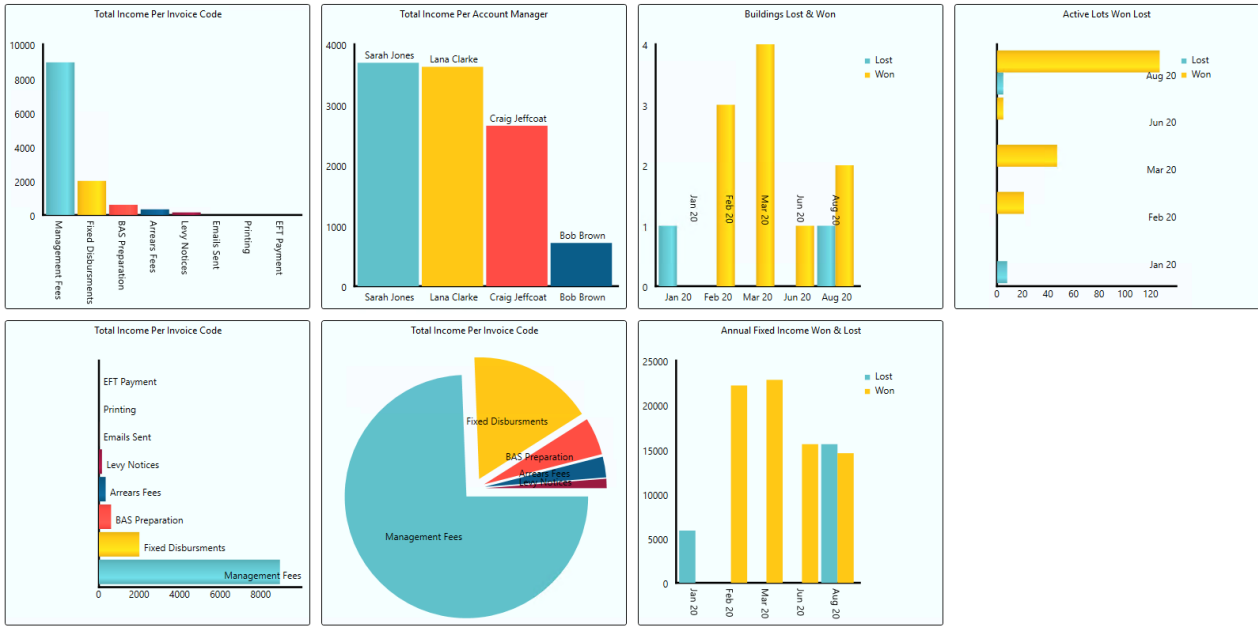
Work Orders - Unfinalised will identify work orders if they have not been finalised based on the 'Finish' date in the dates section of the work order. If the finish date is left blank the work order will never display on the dashboard results.

GLMax Data Dashboard Overview

The **Dashboard** in GLMax has been designed to display data from various sources in charts. The **Dashboard** in GLMax will also include *Dashboard Items* from StrataMax if they have been set up for the user. Open the **Dashboard** from within GLMax by clicking the **Dashboard** icon or by searching for it using the *Search* field in the top left of the GLMax desktop.

Because GLMax data is displayed in charts, *Dashboard Items* for GLMax data cannot be displayed on the GLMax Desktop.

GLMax income data used for *Total Income Per Account Manager* and *Total Income Per Invoice Code* includes both active and inactive buildings for the current financial year of GLMax.



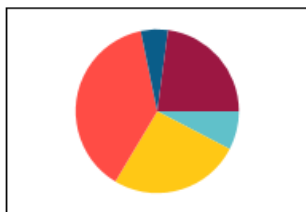
GLMax Data Sources

Data for the following data can be configured to display within the **Dashboard** in GLMax.

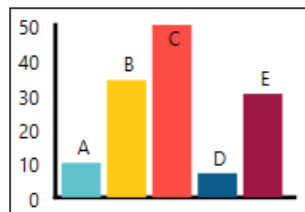
- Total Income Per Account Manager (Active Buildings and GLMax Current year only)
- Active Lots - Won / Lost
- Total Income Per Invoice Code (Active Buildings and GLMax Current year only).
- **Data Health** - To facilitate review and configuration of building data file retention including Building files, Documents, Documents (Lost), Emails, and Logs.

Chart Options

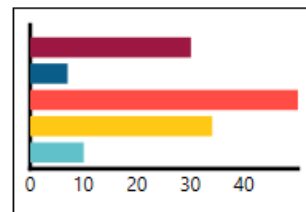
Pie Chart



Bar Chart



Column Chart



Setting Up GLMax Dashboard Items

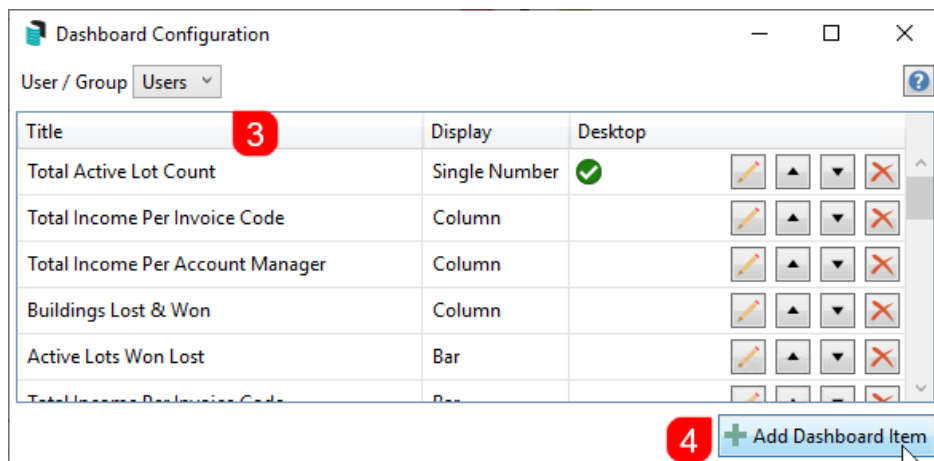
Setting up *Dashboard Items* in GLMax is exactly the same as setting them up in StrataMax (BCMax), with a few changes to the options available. Each of the three sections below explains the steps for their respective data

sources.

Total Income Per Account Manager

The total income per account manager will report income from the current financial year, based on who the account manager is at the time.

1. Access GLMax and open the **Dashboard**, and any existing *Dashboard Items* will be displayed, including those in StrataMax.
2. Click the *Pencil* icon in the top right to open the setup.
3. Click the *User / Groups* drop-down to select which user or user group the *Dashboard Item* will be available for.
 - Depending on which user or group is selected, the list of existing *Dashboard Items* will change.
4. Click the *Add Dashboard Item* button.



5. The Dashboard Item's configuration window will appear. Click the *Report* drop-down menu to select *Total Income Per Account Manager*.
6. Click in the *Display Title* field and change the title if required.
7. Enter a *Maximum Account Managers to Show*; the chart will display the maximum if set in descending order.
8. Select the *Display Type* drop-down menu to choose a chart.
9. Tick the relevant chart settings to change the way the chart will display.
10. Check that the *Preview* looks the way required.
11. Click the *Save* button, and the *Dashboard Item* will be added to the list for that user or group.

Dashboard Configuration
✕

Report 5

Total Income Per Account Manager

Display Title 6

Total Income Per Account Manager

(GLMax Only) Income per account manager from GLMax invoices, where the building is linked to the company 7

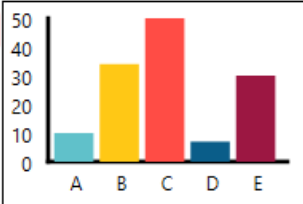
Max Account Managers To Show

Display Type 8

Column

Draw Gradient
 Draw Axis Lines 9
 Show Labels On Chart
 Show X-Axis Labels
 Show Y-Axis Labels
 Vertical X Axis Labels

Preview 10



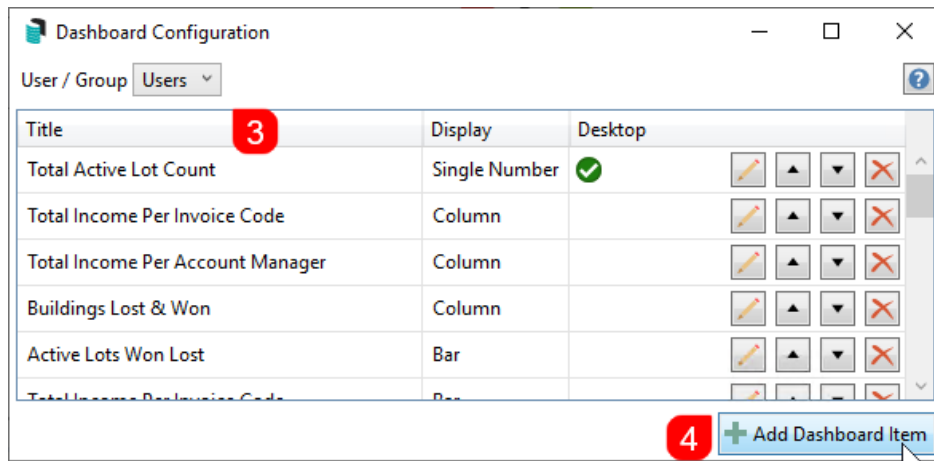
Category	Value
A	10
B	35
C	50
D	10
E	30

Save 11

Active Lots - Won & Lost

The Won buildings will be calculated based on the field 'Taken on Date' that is located in **Building Information** while Lost buildings will be calculated based on the data entered into the Lost Building Information.

1. Access GLMax and open the **Dashboard**, and any existing *Dashboard Items* will be displayed, including those in StrataMax.
2. Click the *Pencil* icon in the top right to open the setup.
3. Click the *User / Groups* drop-down to select which user or user group the *Dashboard Item* will be available for.
 - Depending on which user or group is selected, the list of existing *Dashboard Items* will change.
4. Click the *Add Dashboard Item* button.



5. The Dashboard Item's configuration window will appear. Click the *Report* drop-down menu to select *Active Lots - Won/Lost*.
6. Click in the *Display Title* field and change the title if required.
7. Select whether to report based on *Lots, Buildings, or Income*.
 - A *Dashboard Item* can be set up for each of these options separately; i.e. one to display and report *Lots*, one for *Buildings*, and one for *Income*. *Income* is based on what is set up in [Management Fees Setup](#).
8. Select the drop-down menu to choose if the data should be displayed *Monthly* or *Annually*.
9. Enter the number of intervals; for example, enter "12" to display 12 months.
10. Select the *Display Type* drop-down menu to choose a chart.
11. Tick the relevant chart settings to change the way the chart will display.
12. Check that the *Preview* looks the way required.
13. Click the *Save* button, and the *Dashboard Item* will be added to the list for that user or group.

Dashboard Configuration
✕

Report 5

Active Lots - Won/Lost

Display Title 6

Active Lots Won Lost

Compare the number of active lots gained with new buildings, vs lots in lost buildings, over time

By Lots, Buildings, or Income 7

Management Fee Income

Monthly / Annually 8

Monthly

Number of Intervals 9

12

Display Type 10

Column

Draw Gradient

Draw Axis Lines

Show Labels On Chart

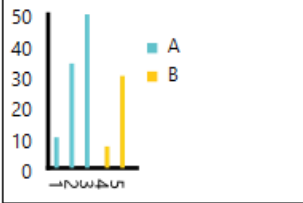
Show X-Axis Labels 11

Show Y-Axis Labels

Vertical X Axis Labels

Show Legend

Preview 12



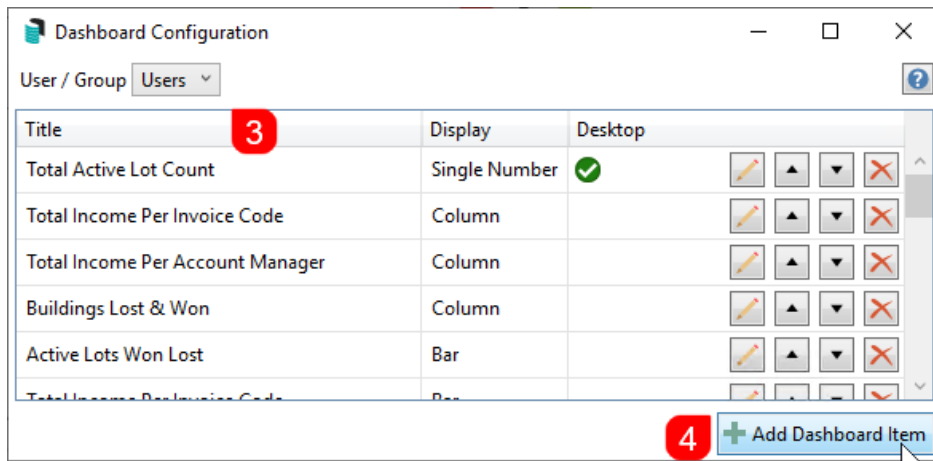
13

Save

Total Income by Invoice Code

The total income by invoice code will report income from the current financial year.

1. Access GLMax and open the **Dashboard**, and any existing *Dashboard Items* will be displayed, including those in StrataMax.
2. Click the *Pencil* icon in the top right to open the setup.
3. Click the *User / Groups* drop-down to select which user or user group the *Dashboard Item* will be available for.
 - Depending on which user or group is selected, the list of existing *Dashboard Items* will change.
4. Click the *Add Dashboard Item* button.



5. The Dashboard Item's configuration window will appear. Click the *Report* drop-down menu to select *Total Income Per Invoice Code*.
6. Click in the *Display Title* field and change the title if required.
7. Enter *Maximum Invoice Codes to Show*; the chart will display the maximum if set in descending order.
8. Select the *Display Type* drop-down menu to choose a chart.
9. Tick the relevant chart settings to change the way the chart will display.
10. Check that the *Preview* looks the way required.
11. Click the *Save* button, and the *Dashboard Item* will be added to the list for that user or group.

