

DocMax | Export Documents

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The instructions in this article cover the the **Export Documents** function in the **DocMax** ribbon.

We also offer a completely free 'DocMax Basics' online course, which you can enrol in [here](#)! Please see the [StrataMax Online Courses](#) page for more details, including the coupon code required to enrol for free.

Export Documents

The **Export Documents** function is for exporting a set of documents from **DocMax** and the creation of an index file (Excel worksheet), which is used for searching the documents. The function provides an efficient way for handing over documents to other parties, including a new manager, auditor, owners & committees.

Exported documents will remain in the original file format, and an excel document can be created that includes the configured data from DocMax properties for columns included in the Advanced Search setup that can be used for searching, and a hyperlink to open each file. Export Documents allows exporting documents for a single building or multiple.

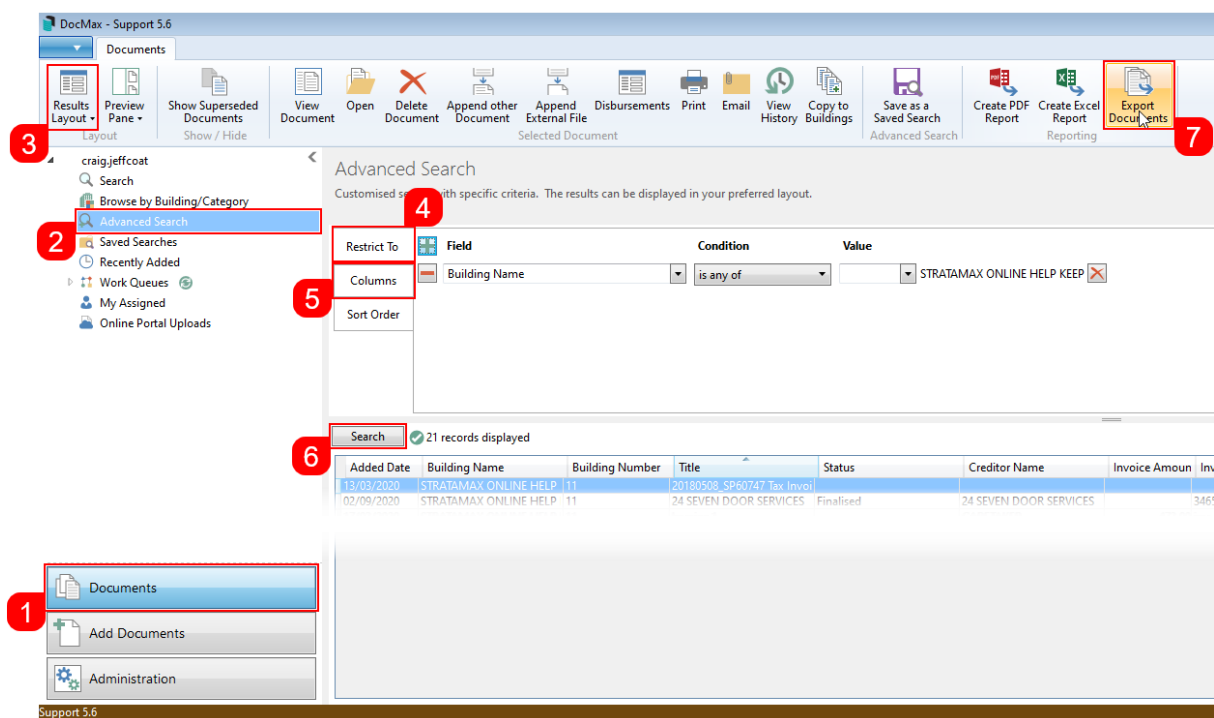
You must change the *Results Layout* to 'Show Results with Grid' for the **Export Documents** button to appear.

Export from an Advanced Search

To export documents from an advanced search, follow below steps:

1. Open **DocMax** and make sure the *Documents* tab is selected.
2. Select *Advanced Search* from the navigation pane on the left side.
3. You must change the *Results Layout* to 'Show Results with Grid' for the **Export Documents** button to appear.

4. Set the *Restrict To* limits to what is required for the export. This may contain a number of different fields and values.
5. Click the *Columns* tab and add the required columns for the export to the *Displayed Columns*.
6. Click the *Search* button and ensure the required documents are displayed. The first 1000 documents will be displayed, however, all results will export.
7. Click the *Export Documents* button in the ribbon.



8. Click on *Browse* and select where to save the documents; you can type in the *Folder* field and click *Select Folder* and a prompt will appear asking "Folder doesn't exist, do you want to create this folder?"; click *Yes*.
9. Tick *Create Export Report* to ensure an *Index* file (Excel worksheet) is created.
10. Click on *Export*.

Export from a Saved Search

To export documents from a *Saved Search* follow below steps:

1. Open **DocMax**.
2. Select the required *Saved Search* from the navigation pane on the left side.
3. Filter using the available fields to get the required documents.
4. You must change the *Results Layout* to 'Show Results with Grid' for the *Export Documents* button to appear.
5. Click on *Refresh*. The first 1000 documents will be displayed however all results will export.

- Click the *Export Documents* button in the ribbon.
- Click on *Browse* and select where to save the documents; you can type in the *Folder* field and click *Select Folder* and a prompt will appear asking "Folder doesn't exist, do you want to create this folder"; click Yes.
- Tick Create Export Report to ensure an index file is created.
- Click on *Export*.

Example of Export

Example Index File

To view files click the *File Name* hyperlink.

1	DocMax Documents									
2	File Name	Added Date	Building Name	Building Number	Title	Status	Creditor Name	Invoice Amount	Invoice Number	Account Manager
3	000001CC.pdf	13/03/2020	STRATAMAX ONLINE HELP KEEP	11	20180508_SP60747 Tax Invoice (Renewal & Endorsemen					StrataMax Training
4	000001E2.png	2/09/2020	STRATAMAX ONLINE HELP KEEP	11	24 SEVEN DOOR SERVICES	Finalised	24 SEVEN DOOR SERVICES		54654	StrataMax Training
5	000001D0.pdf	17/03/2020	STRATAMAX ONLINE HELP KEEP	11	Invoice 1		CARETAKER	473.00	INV-3862	StrataMax Training
6	000001D7.pdf	19/03/2020	STRATAMAX ONLINE HELP KEEP	11	Invoice 1		ETERNITY LANDSCAPING & DESIGN	473.00	INV003862	StrataMax Training
7	000001CE.docx	17/03/2020	STRATAMAX ONLINE HELP KEEP	11	Landscaping 123		ETERNITY LANDSCAPING & DESIGN	100.00	000112	StrataMax Training
8	000001D1.pdf	17/03/2020	STRATAMAX ONLINE HELP KEEP	11	Landscaping 123		ETERNITY LANDSCAPING & DESIGN	100.00	513132	StrataMax Training
9	000001CA.pdf	15/07/2019	STRATAMAX ONLINE HELP KEEP	11	Master Chart					StrataMax Training
10	000001D2.pdf	17/03/2020	STRATAMAX ONLINE HELP KEEP	11	Oris		OTIS ELEVATOR COMPANY	5771.80	593004	StrataMax Training
11	000001D3.pdf	17/03/2020	STRATAMAX ONLINE HELP KEEP	11	Pest Control		ALPPEST	374.00	INV-0765	StrataMax Training
12	000001D5.pdf	19/03/2020	STRATAMAX ONLINE HELP KEEP	11	Pest Control		ALPPEST	374.00	5131444	StrataMax Training
13	000001CD.pdf	13/03/2020	STRATAMAX ONLINE HELP KEEP	11	Q1 Invoice 823					StrataMax Training
14	000001CB.pdf	9/03/2020	STRATAMAX ONLINE HELP KEEP	11	Status Report 01/01/20 to 31/01/20					StrataMax Training
15	000001D8.xps	7/04/2020	STRATAMAX ONLINE HELP KEEP	11	TaskMax Quote Cancellation 11					StrataMax Training
16	000001DA.xps	7/04/2020	STRATAMAX ONLINE HELP KEEP	11	TaskMax Quote Request 11					StrataMax Training
17	000001D9.xps	7/04/2020	STRATAMAX ONLINE HELP KEEP	11	TaskMax Work Order Cancellation					StrataMax Training
18	000001D6.pdf	19/03/2020	STRATAMAX ONLINE HELP KEEP	11	Telstra		TELSTRA	418.50	5361385788	StrataMax Training
19	000001CF.pdf	17/03/2020	STRATAMAX ONLINE HELP KEEP	11	Telstra		ALPPEST	418.50	5361385786	StrataMax Training
20	000001C9.pdf	13/06/2019	STRATAMAX ONLINE HELP KEEP	11	Test		CHAMPION PEST CONTROL	1348.93	00001	StrataMax Training
21	000001D4.xps	17/03/2020	STRATAMAX ONLINE HELP KEEP	11	Untitled EPT					StrataMax Training
22	000001DC.xps	7/04/2020	STRATAMAX ONLINE HELP KEEP	11	Work Order Copy to Advice					StrataMax Training
23	000001D9.xps	7/04/2020	STRATAMAX ONLINE HELP KEEP	11	Work Order Originator to Advice					StrataMax Training

Example of Exported Documents

docmax export

	Name	Date modified	Type	Size
★	000001CA.pdf	4/09/2020 7:55 AM	Adobe Acrobat D...	20 KB
★	000001CB.pdf	4/09/2020 7:55 AM	Adobe Acrobat D...	24 KB
★	000001CC.pdf	4/09/2020 7:55 AM	Adobe Acrobat D...	1,190 KB
★	000001CD.pdf	4/09/2020 7:55 AM	Adobe Acrobat D...	63 KB
★	000001CE.docx	4/09/2020 7:55 AM	Microsoft Word D...	44 KB
★	000001CF.pdf	4/09/2020 7:55 AM	Adobe Acrobat D...	79 KB
★	000001D0.pdf	4/09/2020 7:55 AM	Adobe Acrobat D...	64 KB
★	000001D1.pdf	4/09/2020 7:55 AM	Adobe Acrobat D...	107 KB
★	000001D2.pdf	4/09/2020 7:55 AM	Adobe Acrobat D...	77 KB
★	000001D3.pdf	4/09/2020 7:55 AM	Adobe Acrobat D...	48 KB
★	000001D4.xps	4/09/2020 7:55 AM	XPS File	1,258 KB
	000001D5.pdf	4/09/2020 7:55 AM	Adobe Acrobat D...	48 KB
	000001D6.pdf	4/09/2020 7:55 AM	Adobe Acrobat D...	79 KB
	000001D7.pdf	4/09/2020 7:55 AM	Adobe Acrobat D...	64 KB
lei	000001D8.xps	4/09/2020 7:55 AM	XPS File	1,623 KB
	000001D9.xps	4/09/2020 7:55 AM	XPS File	1,800 KB
	000001DA.xps	4/09/2020 7:55 AM	XPS File	1,274 KB
	000001DB.xps	4/09/2020 7:55 AM	XPS File	2,235 KB
	000001DC.xps	4/09/2020 7:55 AM	XPS File	2,232 KB
	000001E2.png	4/09/2020 7:55 AM	PNG File	395 KB
	Index.xlsx	4/09/2020 7:55 AM	Microsoft Excel W...	8 KB