DocMax | Bulk Update Documents

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This article covers how to update multiple documents in DocMax, which leverages the *Advanced Search* function in DocMax. This function is useful for scenarios such as after a building transfer and some documents within a category need to be split out into separate categories, when adding multiple documents onto the StrataMax Portal, or if multiple documents that were generated from StrataMax (Merge Letters for example) and they are now locked, and need to be unlocked to make further changes.

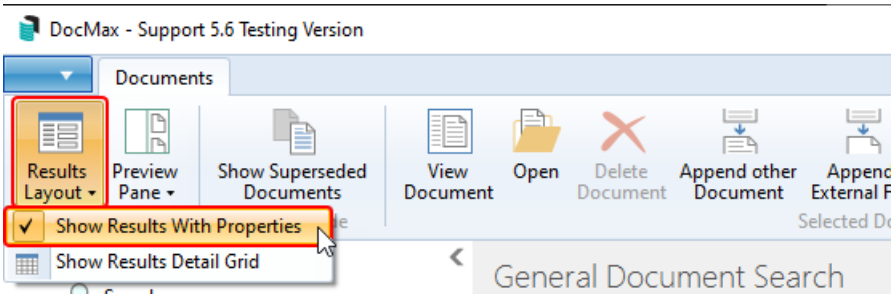
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Locate the Documents

The first step is to narrow down which documents you want to update. To do this we recommend setting up an *Advanced Search*, or using an existing *Saved Search* (depending on if you have one), which you can read about here: *DocMax | Advanced Search and Saved Searches*.

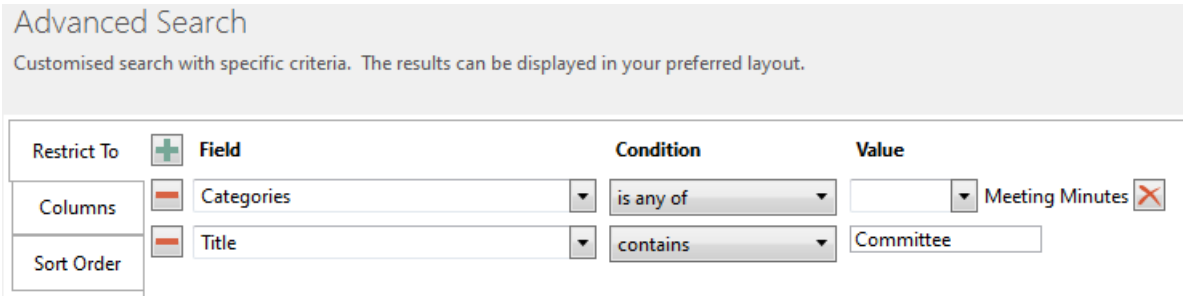
Update the Fields

1. In order to select multiple or all documents, you will first need to change the *Results Layout* to *Show Results With Properties.*

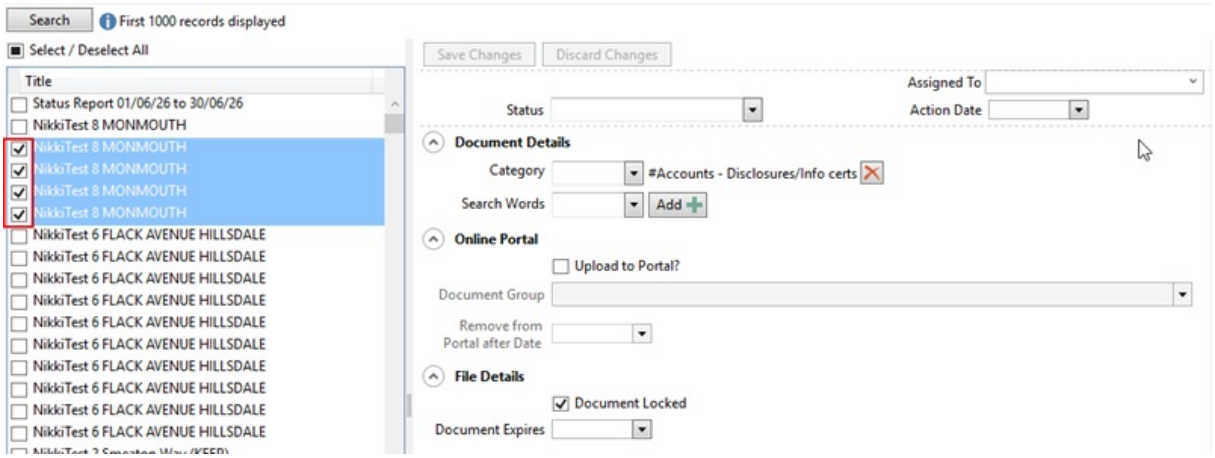


2. Use the Restrict To options to limit the results to what is required and click Search. To avoid

including Lost Buildings add 'Building is Lost' is equal to 'No'.



3. The list of documents will then have tick boxes next to them, which you can tick individually, or use the *Select / Deselect All* box to select the documents.



4. The following fields can then be updated:
    - Status
    - Assigned To
    - Action Date
    - Category
    - Search Words
    - Online Portal incl. the *Upload to Portal?* tick box
    - Document Locked
    - Document Expires