DocMax | Introduction

DocMax is a document management system, and is the perfect companion for StrataMax. As digitised records become more of a necessity rather than a luxury, we encourage our clients to utilise DocMax to its fullest capacity. DocMax integrates with other StrataMax applications to provide end-to-end processing for a number of document related processes such as invoice processing, work orders, insurance policies and claims, as well as uploading documents to the StrataMax Portal.

The flexibility of DocMax allows each client to determine their own level of use of the DocMax application to suit their size and complexity.

DocMax will refer to the user's Active Directory account (i.e. network login) to determine the identity of the user. This approach is in line with StrataMax's core applications. As a result, users will not need to enter login details when they open the DocMax application.

> 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.

Some of the features of DocMax are:

- Management of various file formats
- Filing of documents for individual properties, in specific categories
- Filing of internal/manager documents
- Processing of documents based on a *Status*
- Copying of documents to multiple properties
- Linking of contractor/creditor invoices to StrataMax
- Automatically filing of creditor invoices when saving creditor commitments
- Filing and linking of roll forms, insurance certificates and building plans
- Assignment of documents to users
- Uploading of filed documents directly to the StrataMax Online Portal
- Exporting documents by building, category, date
- Access control by function, category, building
- Emailing of DocMax files directly from various areas
- Multi-drive access

As the administrator, some thought into the setup will be required; planning and review of current office processes will assist with the identification of the areas for setup. The overview below will assist in providing a brief explanation of the areas that are able to be setup in DocMax.

Supported File Types

The table below provides a list of file types that are supported by DocMax meaning that files with the extensions listed below can be filed within DocMax.

Note that not all supported files can be previewed in the DocMax viewer. Any Excel file formats must be viewed via the Excel application. Please refer to the 'Preview available in DocMax' column for the file types that can be previewed using the DocMax viewer.

In order to allow a greater number of file types to be viewed within the DocMax viewer, some file types are automatically converted to XPS for previewing purposes when a user attempts to view a stored document. When this happens, the original file type remains unchanged in the database and an additional XPS copy is created and stored. As a result if the document is viewed subsequently the document will not require re-conversion because the stored XPS copy will be called by the viewer.

Password protected PDF's are available to add to DocMax. Once the password has been entered, the document can be added to DocMax. Please note that these documents will not print, split to/ from another document or append to/ from another document.

File Type	File Extension	Preview in DocMax?	Converted for viewing?
XPS Document (recommended format)	xps	Yes	Already in xps format.
PDF Document	pdf	Yes	No
TIFF Image (recommended format)	tif	Yes	No
	tiff	Yes	No
JPEG Image	jpg	Yes	No
	jpeg	Yes	No
PNG Image	png	Yes	No
Bitmap Image	bmp	Yes	No
GIF Image	gif	Yes	No
Word 97 Document	doc	Yes	Yes
Word Document	docx	Yes	Yes
Text	txt	Yes	Yes
Email Message	msg	Yes	Yes
Word 97 Template	dot	Yes	Yes
Word Template	dotx	Yes	Yes
Rich Text Format	rtf	Yes	Yes
Excel 97 Workbook	xls	No	No
Excel Workbook	xlsx	No	No
Excel Binary Workbook	xlsb	No	No
Comma Separated Values	csv	No	No

Unsupported File Types

Any file type not listed above is likely to be unsupported. The two most common are file types are:

- .html
- .exe

These will be automatically removed from DocMax and save to a network folder 'DocMax\Unsupported files'. These files can then we reviewed and amended to an acceptable format if required to be saved in DocMax. The size limit for PDF files is 60MB if uploading to the StrataMax Portal.

Multi Drive Access

If the office operates with multiple drives, select which drive to open in DocMax or StrataMax. Different drives may be open at the same time
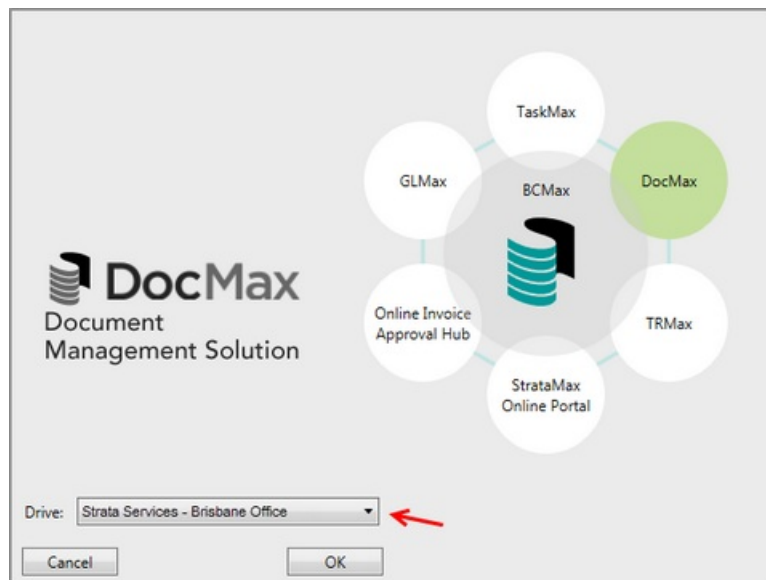
The drive description is visible in the footer bar which will appear in a different colour for each drive.
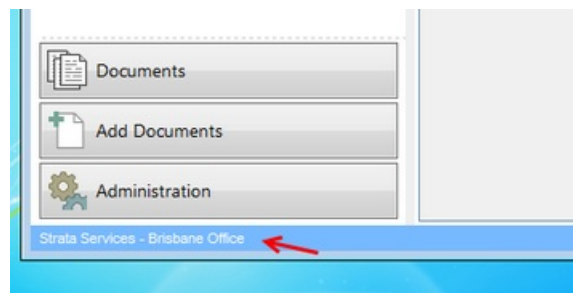
Additional drives can be opened from the top right hand corner, by selecting the drop down arrow. Both StrataMax and DocMax can be opened from this area.