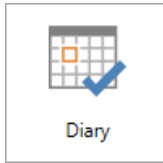


Diary

Last Modified on 16/05/2022 12:12 pm AEST



The instructions in this article relate to *Diary*. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

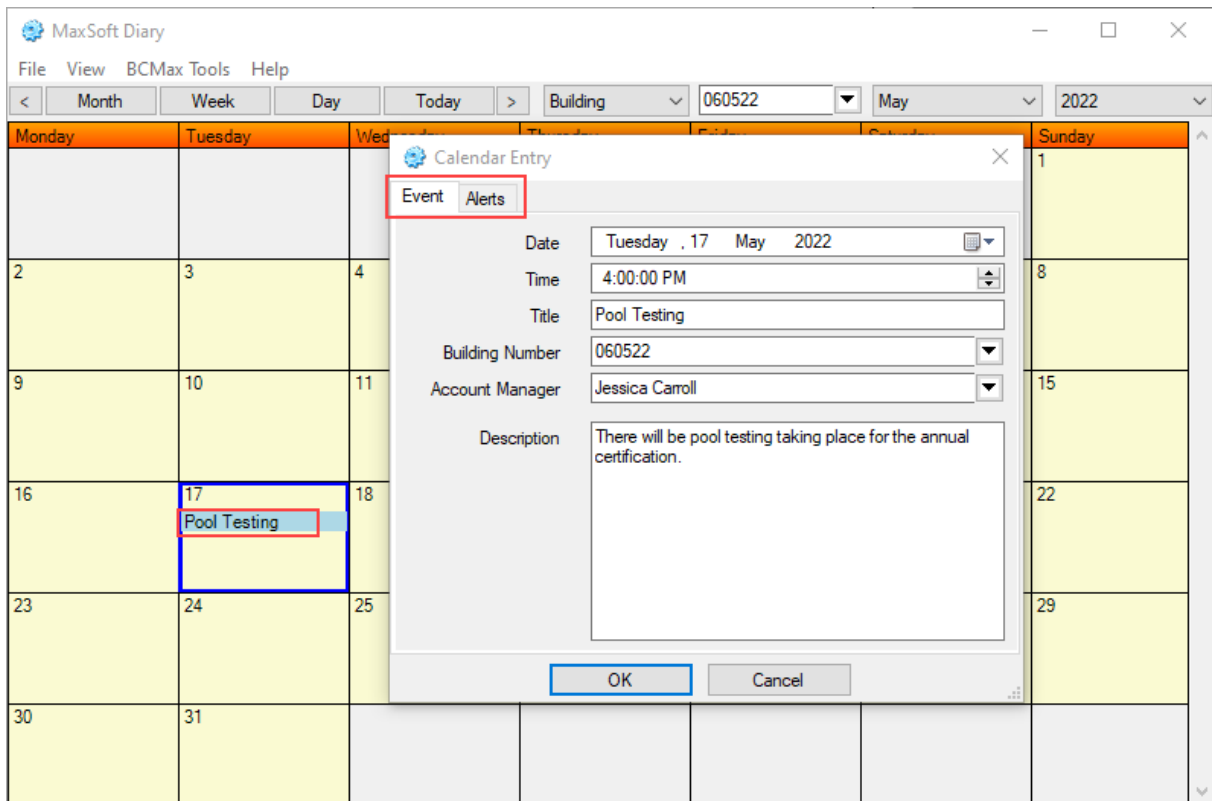
The below instructions relate to the *Diary* which offers basic automated reminders. Some of the features here require data to be populated in the nominated StrataMax fields for the alerts to prompt as expected. Examples include reminders for levy generation, contracts, building maintenance, meeting information and inspections events. Events can also be set for alerts not based around StrataMax data, for example: tasks, meeting preparation reminders, social events etc.

Dashboard information can another source of information that offers similar reporting.

Add an item to the Diary

The *Alerts* area must be completed for an *Alert Date and Time* and *Users* selected for the event to offer any prompts. This includes Auto and Global Entries. It is recommended to add diary entries for each event set by Auto and Global entries to ensure alerts are received as needed.

1. Search or select *Diary*.
2. To add an item, click on the day, right click and select *New*.



3. From the *Event* tab, add the details as needed including the *Time*, *Title*, *Building Number* and *Description*, *Account Manager* field when populated will offer population based on the account manager set.
4. Select the *Alerts* tab, click *Alert Date and Time*, select date and time and tag the staff (StrataMax username) that will receive the alert. THIS STEP IS IMPORTANT.
5. Click *OK*.

Setup Auto Diary Features

The Auto Diary is a facility to setup diary entries for any scheduled event for a scheme. StrataMax will extract data across several areas including Levy Notice dates, Insurance Due dates, Financial Year Ends and Nominations closing dates, making them available to alert and remind in the *Diary*.

There are two types of auto diary entries available. The *Global* entries are customised alerts and do not rely on data sources. The *Auto* entries do rely on source data. Any *auto* entries set, it is important to regularly maintain the data in its respective area and generate the diary to ensure these events are not missed. Alerts can be set tailored to the user for how many days before the due date to prompt for the event.

Auto Entries

1. Search or select *Diary*.
2. From *BCMax Tools*, and *Edit BCMax Auto Diary Entries*.
3. From the *View* on the right, select *Auto* to create a data source entry.
4. Any pre-existing events will be displayed. Click *New* to create a new entry.
5. From the *Data Source* selection, select the data source area.

6. Set the *Time, Conditions* (will vary depending on the data source), enter *Details* and select the *Frequency*.
 - For Building / Levies: Enter: +x months (where x is a number from 1 to 9)
 - For Contracts: Select Contract Number
 - For Inspections: Select Inspection Number
 - For Insurance: Select Policy Type
 - Restrict Building Type: Enter B.F.P. or S.F.P. (as an example)

You may put as many items on condition line that will fit with a colon between items to separate them. If there is not enough room create another entry with the same details and conditions as required.
7. Enter the *Notice Days*, reviewing and selecting *Countdown, Also on Event Date* and *After*.
 - *Notice Days*: The number of days before the even date which the calendar item will occur on.
 - *After*: The number of days after the date.
 - *Countdown*: This will create calendar entries for each date between the notice days and the event date.
 - *Also On Even Date*: Always have a calendar entry on the event date.
8. Click *Save*.
9. Create any further auto diary entries (if needed). Click *Close*.
10. From the building list, tag the required plans or Ctrl + A to tag all buildings / *OK*. This will create the auto diary entries as needed.

BCMMax Auto Diary

Auto Diary Item

Data Source: Insurance - Due Date

Time: 11:00:27 AM

Conditions: 901

Detail: Make payment

Frequency: Yearly

Notice Days

Notice Days: 1

After

Countdown

The number of days before the event date which the calendar item will occur on

Save

Cancel

Generate Auto Diary

Once the auto entries have been set, these will need to be generated. Keeping in mind, that whichever data source is set, the data must be entered to populate. When tagging in the building list, note that you cannot search for building name or number and suggested to select all buildings.

1. Search or select *Diary*.

2. From *BCMax Tools*, and *Generate BCMax Auto Diary*.
3. From the building list, tag all buildings and click *OK*.
4. Events will report in their respective days on the calendar.

Global Entries

1. Search or select *Diary*.
2. From *BCMax Tools*, and *Edit BCMax Auto Diary Entries*.
3. From the *View* on the right, select *Auto*. Any pre-existing events will be displayed. Click *New* to create a new entry.
4. Set the *Event Date*, *Time*, enter a *Title*, *Detail* and set the *Frequency*.
5. Enter the *Notice Days*, reviewing and selecting *Countdown*, *Also on Event Date* and *After*.
 - *Notice Days*: The number of days before the even date which the calendar item will occur on.
 - *After*: The number of days after the date.
 - *Countdown*: This will create calendar entries for each date between the notice days and the event date.
 - *Also On Even Date*: Always have a calendar entry on the event date.
6. Click *Save*.
7. Create any further auto diary entries (if needed). Click *Close*.
8. From the building list, tag the required plans or Ctrl + A to tag all buildings / *OK*. This will create the auto diary entries as needed.

BCMax Auto Diary

Auto Diary Item

Event Date: 23/05/22

Time: 10:27:22 AM

Title: Prepare for AGM

Detail: Start Budget, Agenda

Frequency: Yearly

Notice Days

Notice Days: 10

After

Countdown Also On Event Date

Save

Cancel

View the Diary

The diary offers a view of this information by *Day*, *Week* or *Month*. This view can also be adjusted for *Building*, *User*, *Manager* (account manager)

- This is the general view of the diary. Select a period to change the view and if building view is to be adjusted, drop the selection and pick another view.
- Use the forward or back arrows next to period selection to go forward or back. Or use the *Month / Year* drop down list to select a different period.
- *View* will also give an option to change the period view.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
						1
2	3	4	5	6	7	8
9	10	11	12	13 Make Payment	14	15
16	17 Pool Testing	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Print the Diary

To print the diary which may be useful to refer to as a paper copy, complete the following.

1. Search or select *Diary*.
2. File / Print.
3. Set the *Template* from the drop down selection.
4. Set a *Date Range* or select from the *Presets* available.
5. Within the *Filters* area:
 - *Building Number* to select multiple building. Select the first building, click *Shift* and select the last building for multiple buildings.
 - *Event Detail* to select from a particular even. Select the first record, click *Shift* and select the last record for multiple events.
 - *Username* to select a particular user. Select the first record, click *Shift* and select the last record for multiple users.
 - *Account Manager* to select a particular manager. Select the first record, click *Shift* and select the last record for multiple managers.
6. Set the *Printer for all Diary Printing* and select the appropriate printer.

Diary Report Options

Template:

Date Range

Presets:

Start Date:

End Date:

Filters

Building Number:

Event Detail:

User Name:

Account Manager:

Printer for all Diary printing