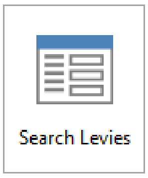
Search Levies

Last Modified on 04/03/2024 10:29 am AEST



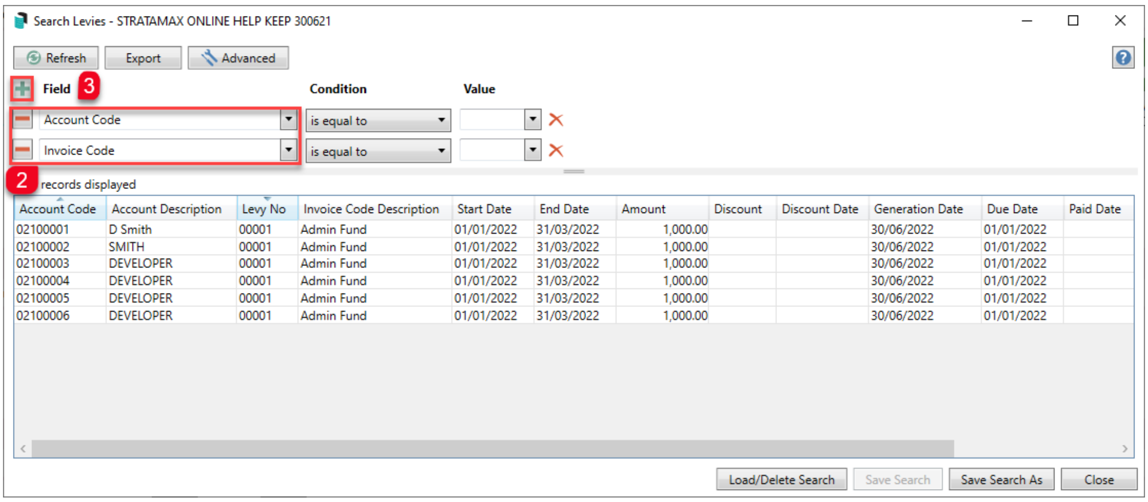
The instructions in this article relate to ***Search Levies.*** The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

Search Levies | Security

To access ***Search Levies*** screen, the user must have the permission set to 'Allow' for 'Search Levies' under the 'Menus' category in ***Security Setup***.

Search Levies

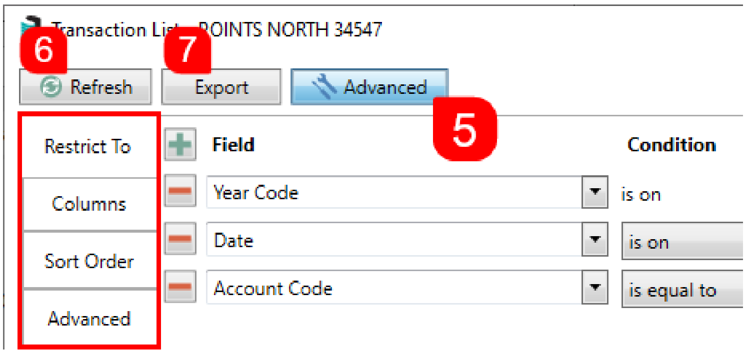
Search Levies has been designed for users to search and report on levy information for a property. This search returns levy data based on set values and the default is Account Code and Invoice Code fields with the ability to include other fields; each column can be clicked on to sort and results can be exported to Excel.

1. Search or select ***Search Levies.***
2. By default, the fields 'Account Code' and 'Invoice Code' will be applied.
   - By removing (click the red 'minus' button) or changing the 'Invoice Code' field to a different field, it will display invoice/levy items across the building.
   - The 'Account Code' field is used to select a specific account code if you have a requirement to report on a specific lot account code.
   - 

3. To add another field, click the green plus button, then select the **Field** by clicking the drop-down menu.
4. Based on the selected **Field,** the **Condition** can be changed if required, and then you can change/select the

required **Value**.

5. Click the *Advanced* button to display additional tabs down the left side:
    - *Columns* to add, remove, or change the order of the columns.
    - *Sort Order* to change how the data in the table is sorted (by column, A-Z, etc.)
    - *Advanced* to change the maximum number of records to display in the table (10000, 1000, etc.).
6. Click the *Refresh* button to search for the records.
7. If you would like to, you can export the data to an Excel sheet, by clicking the *Export* button.



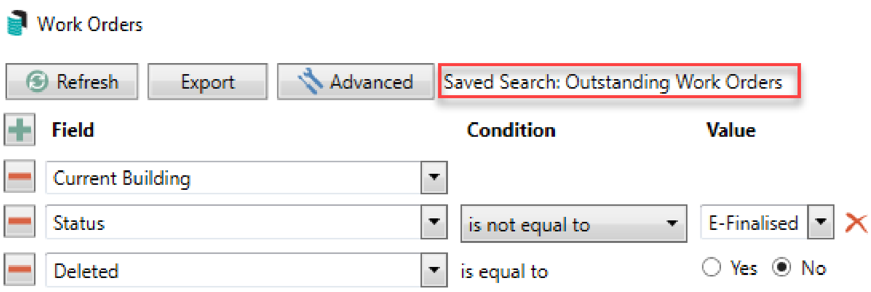
Search Levies | Saved Searches

'Saved Searches' are designed for convenience so that you can save a selection of fields, columns, and a specific sort order so that it can be loaded later.

'Saved Searches' can also be set as the 'default' search for the selected screen. This means that the selection of fields, columns, and specific sort order will be the one chosen whenever the menu screen/icon is selected.

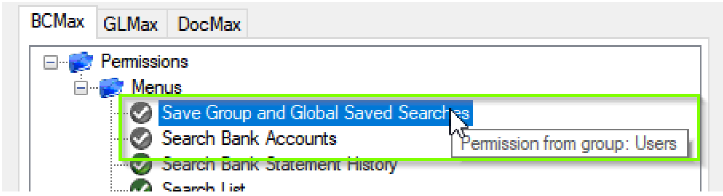
'Saved Searches' can be saved for the current user, globally (accessible to all users), or for a specific user group.

If a Saved Search is loaded/opened this will be noted at the top of the search screen.

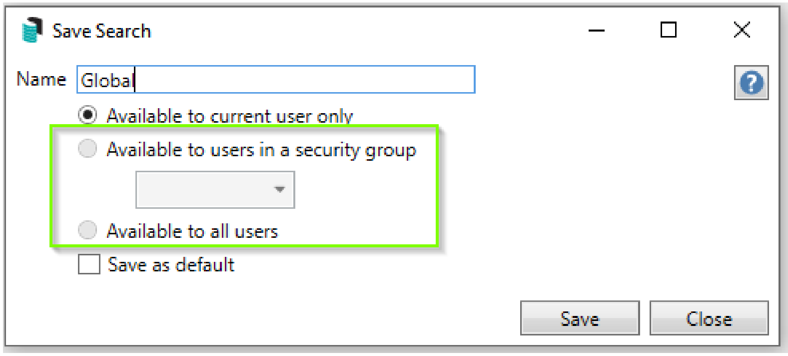


Saved Searches | Security Setup Permissions

A security permission will either allow or deny individual *Users* or *User Groups* access to create or delete a search. The permission is called ‘Save Group and Saved Searches’ under the 'Menus' category in ***Security Setup***. You can also type the word ‘Search’ into the filter field and click the *Filter* button to see the permission.



If the *User* or *User Group* do not have the permission set to 'Allow' then the ability to save a search for all users or a user group will be inactive.



Saved Searches | Set up a new Saved Search

1. Configure the required fields and click the *Refresh* button to display the required data.
    - Optionally click the *Advance* button to also configure the displayed columns, and specific sort order.
2. Click the *Refresh* button to display the data.
3. Click the *Save Search As* button, and the 'Save Search' window will appear.
4. Enter a 'Name'.
5. Select one of the three radio buttons, depending on your requirement:
    - *Available to current user only* will save the search for the current user only.
    - *Available to users in security group* will save the search for the *User Group* selected from the drop-down (this radio button is only available if you have the right permission, and the *User Groups* available in this list are limited to the *User Groups* that you are a member of).
    - *Available to all users* will save the search for all StrataMax users (this radio button is only available if you have the right permission).
6. Optionally tick the *Save as default* box to load this 'Saved Search' whenever the menu screen/icon is opened.

Saved Searches | Load or Delete a Saved Search

1. At the bottom of the screen, click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button to load the *Saved Search*, or click the red cross button to delete the *Saved Search*.
3. If you click the *Load* button, the 'Load Search' window will disappear, and the screen will refresh automatically and load the *Saved Search* data.
4. If you click the *Delete* button, a confirmation pop-up will appear; Click *Yes* to confirm the deletion.

When a Saved Search is loaded/opened, the Saved Search name will be noted at the top of the search screen.

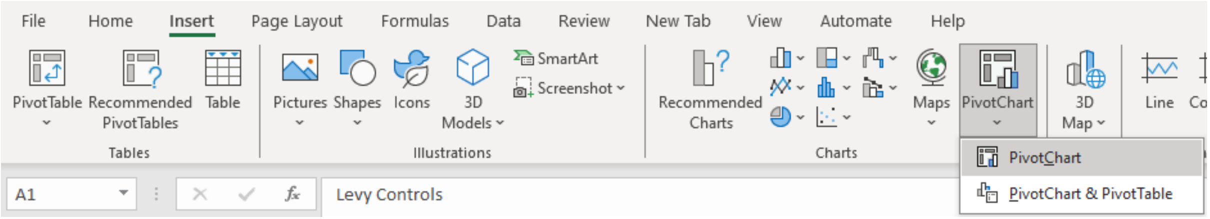
Saved Searches | Edit a Saved Search

1. If the *Saved Search* you want to edit has been set as the default search, it should be on screen already, and you can proceed to the next step. Otherwise click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button.
3. Now make any changes required to the required fields, and optionally click the *Advance* button to also configure the displayed columns, and specific sort order.
4. Click the *Refresh* button to display and check the data.
5. Click the *Save Search* button to save the applied changes.

Search Levies | Excel Charts

Search functions were designed to provide quick access to data that can easily be exported to excel based on your requirements. Once data is in excel tools such as Create Pivot Table and Create Pivot Charts are a great way to display data in different ways that can assist owners & committee in interpreting data.

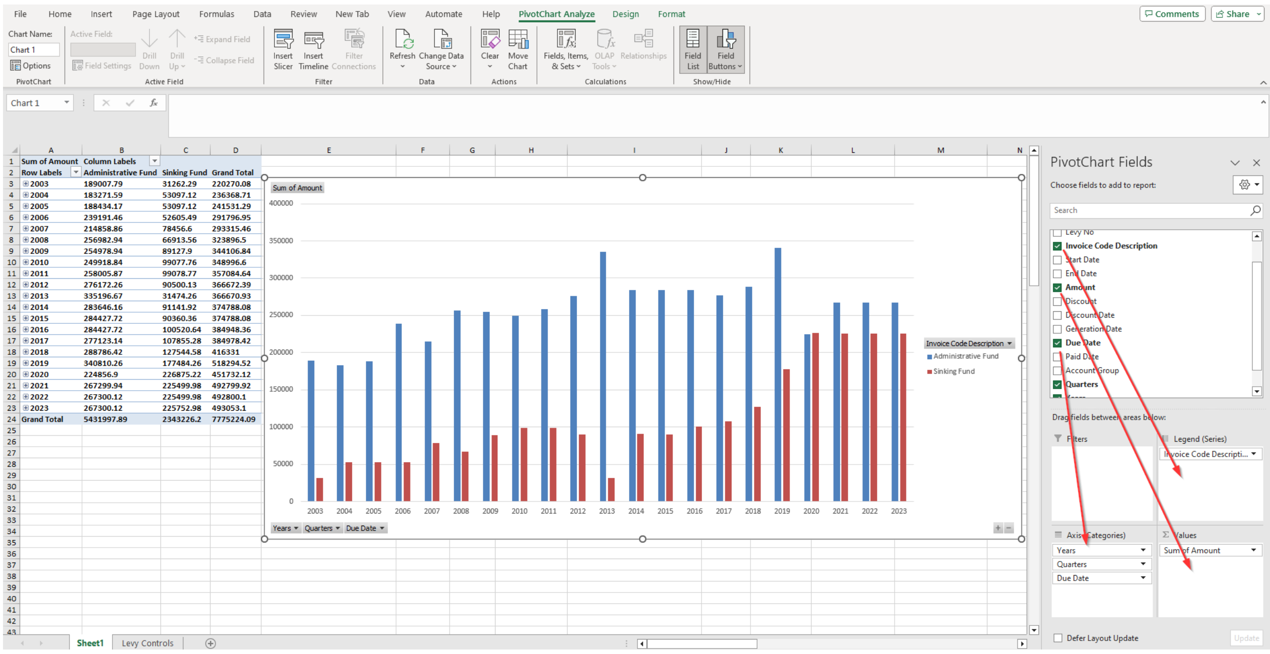
1. Use the steps above to get the required data from Search Levies (for the below chart the Due Date, Invoice Code Description and Amount fields are required). If there are more than 1000 records, remember to change the maximum number of records to retrieve to unlimited.
2. Click on Export
3. In Excel select the Insert tab and select Pivot Chart / Pivot Chart; all data should automatically be selected and click OK

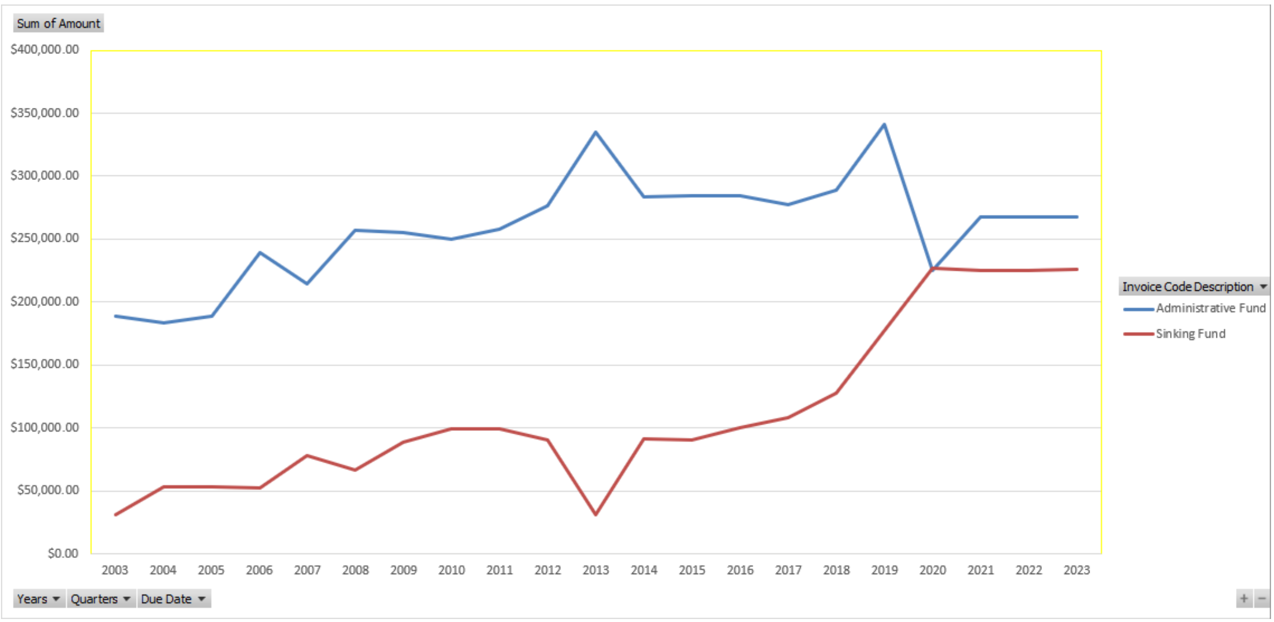


4. From the PivotChart Fields section on the right drag the relevant fields to the required area
    1. Invoice Code Description to the Legend (Series) area
    2. Amount to the Values area
    3. Due Date to the Axis (Categories) area

Once the above steps are completed the chart will look similar to below. Pivot Charts can be customized in many ways; some handy tips include

- To change the chart type to line graph or another type of chart for instance; right click on the chart and select Change Chart Type
- To display the amounts as $; right click on 'Sum of Amount' at top left of chart and select Value Field Settings and click on Number Format and then select Currency and OK
- To customize the chart coloring etc, right click on the chart and select Format Plot Area and make changes as required
- To remove particular Levy Codes, click on the Invoice Code Description legend on the chart and edit the filter as required




Sum of Amount
$400,000.00
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$100,000.00
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2021
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2023
Invoice Code Description
Administrative Fund
Sinking Fund
Years
Quarters
Due Date