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

The Inspections screen has been designed from the ground up to record details of any inspections for the building, e.g. Workplace Health & Safety or Pest Inspections.

From this screen, you can view, create, edit, and delete the following:

- Inspections
- Inspection Types
- Inspection Type Categories
- Inspection Report

## **Inspections Security Permissions**

The Inspections screen and a couple of its features are managed by permissions in Security Setup.

- 'Inspections' controls access to the menu icon and screen.
- 'Inspection Add/Edit Categories' controls if the user can manage Categories.
- 'Inspections Add/Edit Types' controls if the user can manage Inspection Types.

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# **Inspection Types**

Inspections are viewed and managed by Inspection Type, to ease the management of inspections and reporting. The various Inspection Types will be listed in the table, in the top half of the *Inspections* screen, and as each Inspection Type is selected, the Inspections for that type will be displayed in the bottom half of the screen.

The 'Inspection Types available' table lists the various Inspection Types that are available in the current selected building only. The building can be changed using the building selector in the top left.

The Name, Category, Frequency, and Next Planned (date) are all entered when creating or editing the Inspection Type. The Next Due (date) is a calculation based on Last Inspected (date) and the Frequency and cannot be manually edited.

The Last Condition is observed from the most recent inspection for this Inspection Type.

An icon in the Notes column indicates that notes are entered for this Inspection Type, but not the inspections themselves. Click the icon to add, edit, or delete notes for the Inspection Type.

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Building: -KEEP 10002  Feedback											?	
Name	, in types	Category	Frequency	у	Next Planned	Next D	ue l	ast Inspected	Last Condit	ion	Notes	
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Inspections for TENNIS COURT MAINTENACE												
Date	Condition	Result						Result Amou	nt #Issues			
01/01/2026	NA	This is the result						100000.00	0	1		×
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+ Add New Inspection / Add/Edit Inspection Types Inspection Report												

### **Creating A New Inspection Type**

This section explains how to create a new Inspection Type. This should only be done if an Inspection Type is not already available to import from another building.

- 1. Search or select *Inspections*.
- Click the Add/Edit Inspection Types button, and the Add/Edit Building Inspection Type window will open.
- 3. Click the Add Type button, and the New Inspection Type window will open.

- 4. Fill in the fields:
  - Type Name (mandatory): This will be for example 'Asbestos' or 'Pest Control'.
  - Frequency: Select from the drop-down menu.
  - Abbreviation Code (mandatory): This is a number that must start with a '6'. This is used by StrataMax internal database to manage the various Inspection Types across the entire portfolio. This must be unique per building.
  - Category (mandatory): Select from the drop-down menu. These can be managed using the instructions further down in this article.
  - Default Inspection: This is used for various reports throughout StrataMax and is not mandatory.
  - Next Planned: Choose from the drop-down calendar.
- Click the Add/Edit Notes button to add, edit, or delete any notes associated to this Inspection Type.
- 6. Click the Accept button, and the Add/Edit Building Inspection Type window will close

#### **Importing Inspection Type**

If an Inspection Type has previously not been used in a building, Inspection Types from other buildings can be imported. As Inspection Types may vary between buildings, the new Category field is available in *Search Inspections*, which can be used to limit results for reporting & Dashboard purposes. Follow the below steps to import an inspection type:

- 1. Search or select Inspections.
- 2. Select Add/Edit Inspection Types.
- 3. Click the Import Type button to open the 'Import Inspection Types' window.
- 4. The search bar can be used to locate a particular Inspection Type if needed.
- 5. Tag the required Inspection Types to import, and use the *Code Override* field to type in a different code (starting with a '6') if the *Abbreviation Code* already exists in the current building, or if you are importing multiple Inspection Types with the same *Abbreviation Code*.
- 6. Click the Import & Close button.

#### **Editing an Inspection Type**

This section explains how to edit an inspection record in the local building.

- 1. Search or select Inspections.
- Click the Add/Edit Inspection Types button, and the Add/Edit Building Inspection Type window will open.
- 3. Click the *Edit Inspection Type* button, located on the far right, and looks like a pencil.

- 4. Amend any of the fields as required:
  - Type Name (mandatory): This will be for example 'Asbestos' or 'Pest Control'.
  - Frequency: Select from the drop-down menu.
  - Abbreviation Code (mandatory): This is a number that must start with a '6'. This is used by StrataMax internal database to manage the various Inspection Types across the entire portfolio. This must be unique per building.
  - Category (mandatory): Select from the drop-down menu. These can be managed using the instructions further down in this article.
  - Default Inspection: This is used for various reports throughout StrataMax and is not mandatory.
  - Next Planned: Choose from the drop-down calendar
- 5. Click the *Add/Edit Notes* button to add, edit, or delete any notes associated to this Inspection Type.
- 6. Click the Accept button, and the Add/Edit Building Inspection Type window will close.

**Note**: The Next Due (date) is a calculation based on Last Inspected (date) and the Frequency, and cannot be manually edited.

#### **Deleting an Inspection Type**

This section explains how to edit an inspection record in the local building. Bear in mind if an Inspection Type is in use, it cannot be deleted, however it can be merged into another Inspection Type. See the next section below for information on how to merge Inspection Types.

- 1. Search or select Inspections.
- Click the Add/Edit Inspection Types button, and the Add/Edit Building Inspection Type window will open.
- 3. Tag the Inspection Type to remove (it cannot be deleted if it is in use).
- 4. Click the *Delete* button.

### **Merging Inspection Types**

This section steps through the process of merging two or more Inspection Types. This can be used where an Inspection Type is in use and needs to be removed, for example.

When using the function, the Inspection Types that are removed will have their properties such as frequency, default inspection, etc. changed to use the ones of the Inspection Type that is kept. In addition, notes in the Inspection Types that will be removed will also be transferred to the Inspection Type that is kept.

Use this function with caution as it cannot be undone.

- 1. Search or select Inspections.
- 2. Click the *Add/Edit Inspection Types* button, and the Add/Edit Building Inspection Type window will open.
- 3. Tag each Inspection Type to merge.
- 4. Click the *Merge* button, and the Records Selection window will open to select the Inspection Type that all other Inspection Types will be merged into.
- 5. Click OK and a Merge Inspection Types warning will appear. Click Yes to proceed with the merge.

Name	Frequency	Category	Code	Default For	Next Planned		In-
ASBESTOS	Quarterly	Asbestos 2027	601	Asbestos		1	
ASBESTOS 15 \$	Other	Asbestos 2027	609			1	
BUILDING VALUATION	3 Yearly	Valuations	602	Building Valuation		1	
FIRE INSPECTIONS	Annually	Uncategorised	603			1	
Description Calenting		604	Insurance Valuatio		1		
Records Selection			605			1	
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### **Inspection Type Categories**

Inspection Categories assist with managing Inspection Types and reporting. These can be created, edited, merged, and deleted (when not in use). Categories are global and can be used in all buildings.

### **Add New Category**

- 1. Search or select Inspections.
- 2. Click the *Add/Edit Inspection Types* button, and the Add/Edit Building Inspection Type window will open.
- 3. Click the Edit Categories button and the View/Edit Global Inspection Categories window will open.
- 4. Click the Add button and type in the Category Name, then click Save.

### **Edit a Category**

- 1. Search or select Inspections.
- Click the Add/Edit Inspection Types button, and the Add/Edit Building Inspection Type window will open.
- 3. Click the Edit Categories button and the View/Edit Global Inspection Categories window will open.
- 4. Click the *Edit Category* button (looks like a pencil) and make the required change in the *New/Edit Category* field, then click *Save.*

#### **Delete a Category**

Only Categories that are not in use can be deleted. Use the Merge function if Categories that are in use need to be removed.

- 1. Search or select Inspections.
- Click the Add/Edit Inspection Types button, and the Add/Edit Building Inspection Type window will open.
- 3. Click the Edit Categories button and the View/Edit Global Inspection Categories window will open.
- 4. Tag the Category to remove (it cannot be deleted if it is in use).
- 5. Click the *Delete* button and click *Yes* when the warning appears.

### **Merge Categories**

- 1. Search or select Inspections.
- 2. Click the *Add/Edit Inspection Types* button, and the Add/Edit Building Inspection Type window will open.
- 3. Click the Edit Categories button and the View/Edit Global Inspection Categories window will open.
- 4. Tag each Category to merge.
- 5. Click the *Merge* button, and click *Yes* when the warning appears.
- 6. Type the name of the new Category in the New/Edit Category field, then click Save.

## **Managing Inspections**

This section guides users through how to add new, edit and delete Inspections. Inspections are viewed and managed by *Inspection Type*, to ease the management of inspections and reporting. The various *Inspection Types* will be listed in the table, in the top half of the *Inspections* screen, and as each *Inspection Type* is selected, the *Inspections* for that type will be displayed in the bottom half of the screen.

Inspections For 10	002					_		×	
Building:	-KEEP 10	002 -				P	Feedback	?	
Inspection Typ	es available								
Name	Category	Frequency	Next Planned	Next Due	Last Inspected	Last Condition	Notes		
SPA	Uncategorised	Monthly	01/01/2025	01/01/2025	01/12/2024	Unsatisfactory		^	
TENNIS COURT MAIN	l <sup>•</sup> Uncategorised	Annually	01/01/2027	01/01/2027	01/01/2026	NA	-		
TENNIS COURT\$ 202	5 Uncategorised	Annually	01/01/2026	08/01/2026	08/01/2025	Unsatisfactory		$\sim$	
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#### **Add New Inspection**

- 1. Search or select Inspections.
- Select the required Inspection Type if it has previously been used in the building, and then click the *Add New Inspection* button. Refer to Import Inspection Type above if the Inspection Type has not previously been used.
- 3. Select the Overall Condition from the drop-down menu.
- 4. Select the *Inspection Date* from the drop-down menu.
- 5. Type in the *Inspection Results* (limited to 30 characters).
- 6. Type the *Results Amount*. This limited to 30 numerical characters and is formatted automatically.
- Start typing the creditor / contractor name in the *Inspected By* field and the Account Code List window will appear for a creditor to be selected. Note in the top right, the *Master Chart* and *Add New Creditor (green plus)* buttons can be used if needed.
  - Only one creditor / contractor can be selected.
  - After the creditor / contractor has been selected, it can be edited or deleted from the inspection with the corresponding buttons in the top right.
- Add an issue by clicking the *Add New Issue* button in the bottom right, and enter the details as required, including adding a document / image with the *Add Document* button. Click *Save* and *Close* when done.
- 9. Enter Follow Up Notes if necessary.
- 10. Enter *Comments* if necessary.
- 11. Enter Internal Notes if necessary.
- 12. Add Images and/or document using the *Add Document* button in the bottom right.
- 13. Inspection participants can be added by using the *Select From Roll, Select Contact, and Create Contact* buttons.
- 14. Once all field and section are populated as required, click the Save & Close button.

### **Edit an Inspection**

- 1. Search or select Inspections.
- 2. Select the required Inspection Type, and then click the Edit Inspection (pencil) button.
- 3. Amend the details, fields, and section as required, then click the Save & Close button.

#### **Delete an Inspection**

- 1. Search or select Inspections.
- 2. Select the required Inspection Type, and then click the *Delete Inspection (red X)* button.
- 3. Read the Delete Inspection warning carefully and click the Delete button to proceed.

# **Inspection Report**

This section explains how to produce the Inspection Report/Register, which uses the *Report Distribution* interface. The report produced in this screen is limited to the local building, and uses the template available, named 'Inspections Register'.

Other alternatives include the *Building Information Report*, which also includes some inspection information. A global report can also be produced with Inspection details and upcoming inspection dates for a single, multiple or all buildings using the *Search Inspections* screen.

- 1. Search or select Inspections.
- 2. Click the Inspection Report button, and the Inspection Register window will open.
  - Please refer to the *Report Distribution article* for more detailed guidance on how to use this window, such as changing the *Distribution Method*, adding reports and attachments, etc.