

DocMax | Security, Overview & Settings

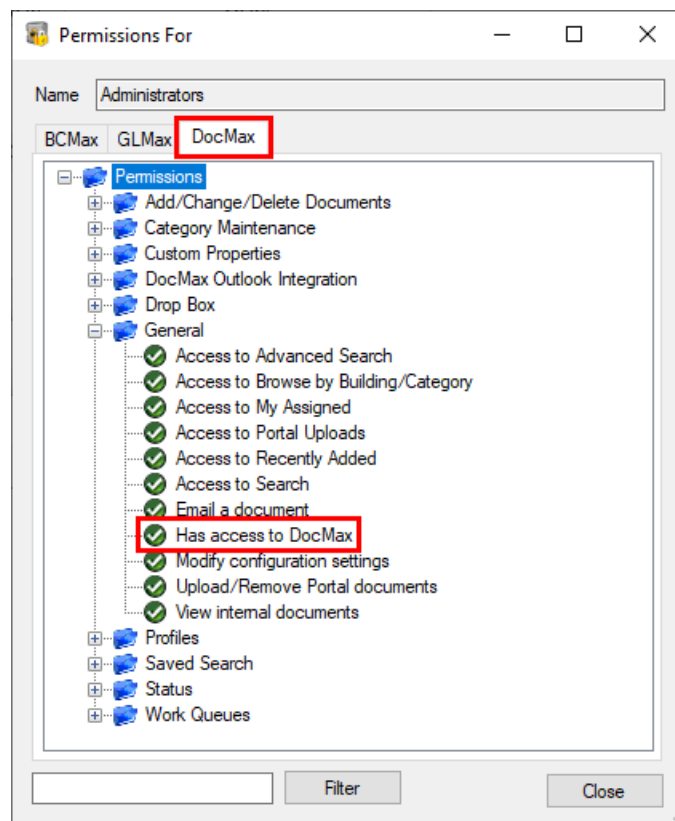
Last Modified on 28/11/2024 8:54 am AEST

This article covers an overview of the DocMax interface, and navigation of DocMax, as well as the available settings within **DocMax**. There are no processes contained within this article, and should only be used as a reference for information.

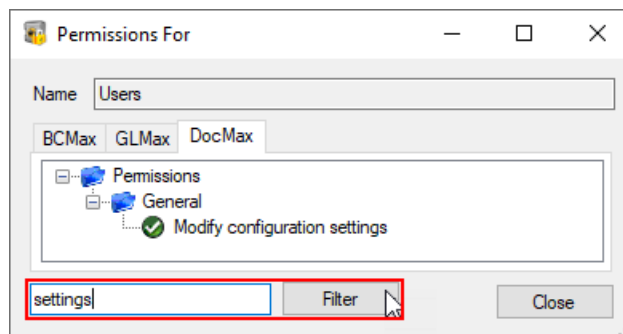
We also offer a completely free 'DocMax Basics' online course, which you can enrol in [here!](#) Please see the [StrataMax Online Courses](#) page for more details, including the coupon code required to enrol for free.

DocMax | Security Setup

Access to DocMax features and functions are controlled by permission located in the *DocMax* tab in **Security Setup**, in StrataMax. Administrator access will be required to amend any security permissions. Permissions can be amended for individual users or a group of users, and access can be denied for particular Buildings. Access to DocMax itself is controlled by the 'Has access to DocMax' permission specifically:



Access to the DocMax *Settings* is controlled by the DocMax permission 'Modify configuration settings' in **Security Setup**:



Security | Add/Change/Delete Documents

- Add Documents: Allows the user to add documents to DocMax.
- Allow unlocking of locked documents: Allows the user to unlock a locked document
- Added, split, link or supersede documents: Allows the user to perform any function which creates a link between two documents (a direct link or a 'supersede' / 'superseded by' link). This includes the Split and Append functions as these both create new document records behind the scenes which supersede the original document.
- Delete Documents: Enables the Delete function for the user in the Documents View.
- Edit document properties: Allows the user to change the document properties for a document in the Documents view.
- Export internal documents: Allows the user to Export documents via the Administration view with the 'Property Documents' option selected.
- Export property documents: Allows the user to Export documents via the Administration view with the 'Property Documents' option selected.
- Import: Allows the user to Import documents via the Administration view.

Security | Category Maintenance

- Add a Category: Allows a user to create a new Category in the Administration view.
- Edit a Category: Allows a user to make changes to an existing Category in the Administration view.
- Merge a Category into another: Allows a user to merge two existing Categories into one in the Administration view.

Security | Custom Properties

- Add a Custom Property: Allows a user to create a new Custom Property in the Administration view.

- Edit a Custom Property: Allows a user to make changes to an existing Custom Property in the Administration view.

Security | DocMax Outlook Integration

- Add documents from Outlook: Enables the Add to DocMax options within Outlook for this user

Security | Drop Box

- Allow creating, editing and removing of your own drop boxes: Allows a user to set up their drop boxes in the Administration view. Drop boxes belonging to the user can be added, edited, and deleted.
- Delete Drop Boxes for other users: Allows a user to delete an existing drop box that belongs to another user in the Administration view.

Security | General

- Access to Advanced Search: Allows the user to access Advanced Search
- Access to Browse by Building: Allows the user to access Browse by Building in the Documents view.
- Access to Browse by Category: Allows the user to access Browse by Category in the Documents view.
- Access to My Assigned: Allows the user to access My Assigned in the Documents view.
- Access to Portal Uploads: Allows the user to access Online Portal Uploads in the Documents view.
- Access to Recently Added: Allows the user to access Recently Added in the Documents view.
- Access to Search: Allows the user to access Quick Search in the Documents view.
- Email a document: Enables the Email function for the user in the Documents View.
- Has access to DocMax: Allows the user to open the DocMax application
- Modify configuration settings: Allows the user to make changes to global DocMax Settings within the Application menu.
- Upload/Remove Portal documents: Allows the user to use the Upload and Remove functions within the Online Portal Uploads screen in the Documents view.
- View internal documents: Allows the user to access all documents marked as Internal

Security | Profiles

- Add new 'Profiles': Allows a user to create a new 'Profile' in the Administration view
- Delete 'Profiles': Allows a user to make changes to an existing 'Profile' in the Administration view.
- Edit 'Profiles': Allows a user to delete an existing 'Profile' in the Administration view.

Security | Saved Search

- Access to view Saved Searches: Allows the user access to Saved Searches in the Documents view.
- Add, edit, delete a search available to everyone: Allows a user to make a new search available to Everyone. Allows a user to edit or delete an existing search which is available to Everyone.
- Add, edit, delete a search available to other users or groups: Allows a user to make a new search available to another user or group that the user is not a member of. Allows a user to edit or delete an existing search which is available to another user or group that the user is not a member of.
- Add, edit, delete a search available to your groups: Allows a user to make a new search available to a Group that the user is a member of. Allows a user to edit or delete an existing search which is available to a Group that the user is a member of.
- Add, edit, delete a search available to yourself: Allows a user to add, edit or delete a search available to you.

Security | Status

- Add a Status: Allows a user to create a new Status in the Administration view.
- Edit a Status: Allows a user to make changes to an existing Status in the Administration view.

Security | Work Queues

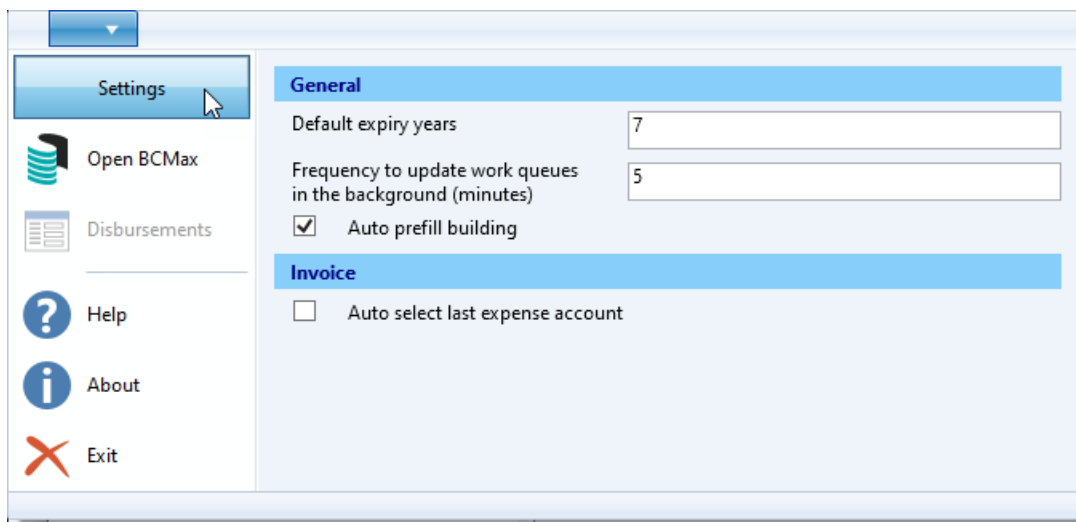
- Access to use Work Queues: Allows a user access to Work Queues in the Documents view
- Add new Work Queue available to all users: Allows a user to make a new Work Queue available to Everyone.
- Add new Work Queues available to your groups: Allows a user to make a new Work Queue available to a group the user is a member of.
- Add new Work Queues for other users or groups: Allows a user to make a new Work Queue available to another user / group that the user is not a member of.
- Add, edit, delete my own Work Queues: Allows a user to add/ edit / delete Work Queues which are available to them only.
- Delete Work Queues available to all users: Allows a user to delete an existing Work Queue which is available to Everyone.
- Delete Work Queues available to your groups: Allows a user to delete an existing Work Queue which is available to a group the user is a member of.
- Delete Work Queues for other users or groups: Allows a user to delete an existing Work Queue which is available to another user / group that the user is not a member of.
- Edit Work Queues available to all users: Allows a user to edit an existing Work Queue which is available to

Everyone.

- Edit Work Queues available to your groups: Allows a user to edit an existing Work Queue which is available to a group the user is a member of.
- Edit Work Queues for other users or groups: Allows a user to edit an existing Work Queue which is available to another user or a group that the user is not a member of.

DocMax | Settings

Select the drop-down arrow in the top left-hand corner to review the *Settings* menu. Settings are controlled by a permission in [Security Setup](#).



Default expiry years

This field will manage the time frame for how long documents are to be saved within DocMax. This will automatically update the *Document Expires* field when adding new documents to DocMax.

Frequency to update work queues in the background (minutes)

This is the amount of time that is set for how often Work Queues are updated. This can be overridden by clicking the 'Refresh' icon next to the queue name, or when a user saves any changes to a document in the queue.

Auto Prefill Building

Please refer to the *Auto Prefill Building* section below. This is a global setting and will be set for all users, and it is disabled by default.

Auto select last expense account

When entering the creditor information or an invoice, this will automatically select the last expense code used for that creditor.

Open BCMAX

Will open StrataMax.

Disbursements

This opens the [Disbursements](#) screen in StrataMax.

Help

Will launch StrataMax Online Help.

About

Displays the DocMax version information.

Exit

Will exit DocMax.

Auto Prefill Building

When enabled, DocMax will assign a building to the document when it is being added. This can be via the Outlook Add-In, Dropbox or the 'Add Documents from Folder location' options, and will also assign the building when using a DocMax profile. Supported files are .pdf, .doc, .docx, .xps, .msg, and .txt.

Even though a building is assigned automatically, it's important to check and if necessary change the building before clicking the *Add Document* button.

DocMax identifies the building using keywords within the document, and will first try to find the CTS number, and then the Plan Number. Only numbers can be identified, so buildings with letters (such as Sub Groups) and **GLMax** companies will not be identified.

The following keywords are checked to identify the CTS and/or Plan number:

CTS	C.T.S.	Scheme	GTP	G.T.P.	SP
S.P.	Plan	Plan No	Building Number	Building No	Owners Corporation
OC	O.C.	OCP	Plan of Subdivision	PS	P.S.
Units Plan	UP	U.P.	SSP	S.S.P.	STP
S.T.P.					

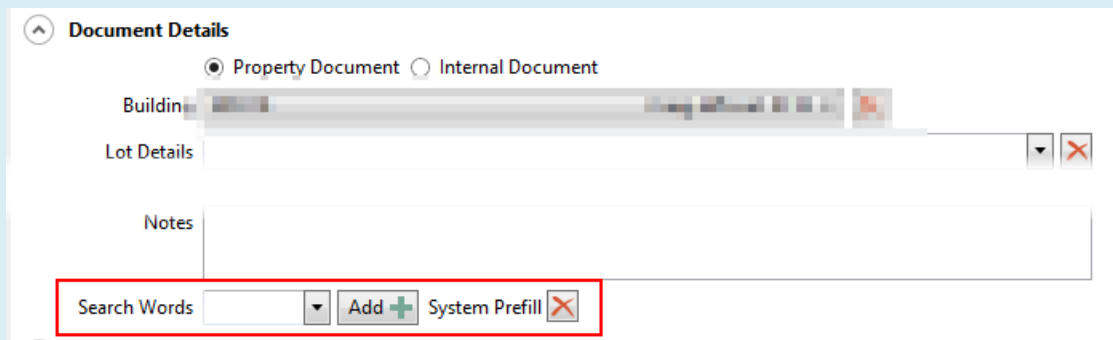
So, when adding a document, the text '12345' will not be identified, whilst 'CTS 12345' will. There can also be separator characters between the keyword and number, 'Plan No-111' or 'Plan No - 111' or 'Plan No: 111'

If there are no valid keywords within the document, DocMax will attempt to identify the building from **Building Information** the text in the following order and selects the first building that matches:

- ABN number (can have space or – separators. Eg: '11-111-111-111'. Field in the **Building Information** menu)
- Building address (Location 1 - from **Building Information**)
- Email Addresses that match building owner contacts (in the **Roll**) **Building Information**
- Building Long Name and if there are no matches, Building Name (both fields in **Building Information**)

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When a document has been added using the prefill option the Search Words will be included 'System Prefill'.

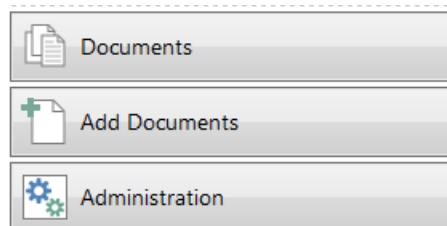


The screenshot shows a 'Document Details' form with the following elements:

- Radio buttons for 'Property Document' (selected) and 'Internal Document'.
- A 'Buildin' field with a dropdown arrow and a red 'X' icon.
- A 'Lot Details' field with a dropdown arrow and a red 'X' icon.
- A 'Notes' text area.
- A 'Search Words' field with a dropdown arrow, an 'Add +' button, and a red 'X' icon. The text 'System Prefill' is visible next to the 'Add +' button.

DocMax | Tabs

DocMax has three tabs, located in the bottom left, which contain their own set of menu items in the navigation menu:



Documents

The first menu, *Documents*, allows access to all previously added and filed documents.

Add Documents

The *Add Documents* menu will show recently accessed folder locations and allow adding of new folder locations. Documents can be added to DocMax by various methods.

Administration

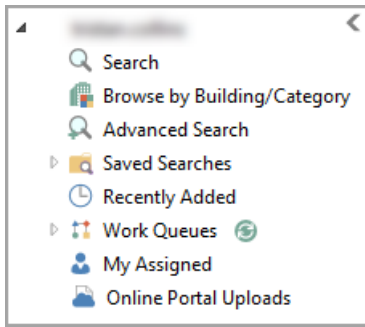
Users with Administrator access will be able to access and use this section of DocMax.

DocMax | Navigation Pane

The list on the left side of DocMax is called the *Navigation Pane*, and the menu items within will differ between the different tabs above. Each of these are covered in their respective articles.

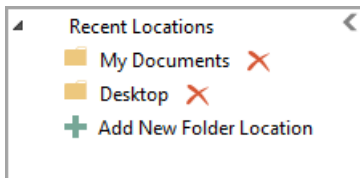
Document Navigation Pane

This is covered in the [DocMax | Documents Tab](#) article.



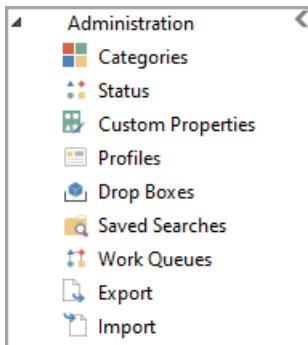
Add Documents Navigation Pane

This is covered in the [DocMax | Add Documents](#) article.



Administration Navigation Pane

This is covered in the [DocMax | Administration](#) article.



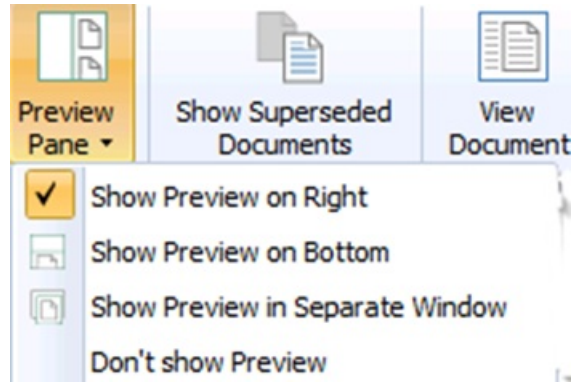
DocMax | Preview Window

The current page number and total number of pages is shown beneath the preview. Pages can be navigated using the Previous, Next, First Page or Last Page buttons, or by entering a particular page number: The Zoom level of the preview that is displayed can be changed using the Zoom percentage controls. The Zoom level can also be set to fit the Page Width or Page Height options:



The preview of the current document / s can be set to be displayed either on the right or bottom of the screen. Alternatively, the preview can be displayed in a separate window (to allow moving to a second screen) or not

shown at all.

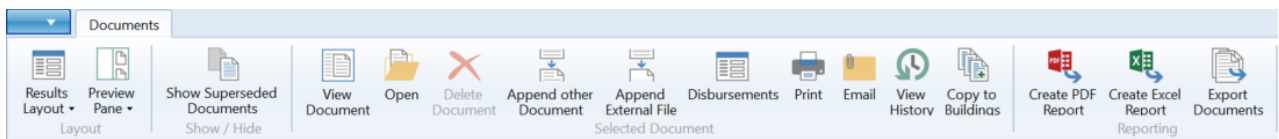


DocMax | Ribbon

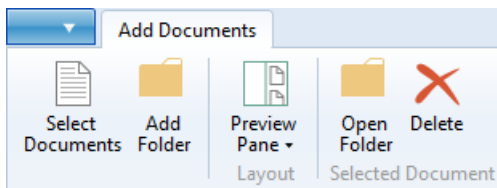
The *DocMax Ribbon* runs along the top of the screen and contains an icon for each functions available in DocMax, as well as some customisation options for the layout. The ribbon is contextual, meaning that certain buttons will appear only in certain menus of DocMax, or when a document is selected.

Documents Ribbon

For an explanation of each of the buttons in this ribbon see the [Documents Ribbon](#) article.



Add Document Ribbon



Administration Ribbon

