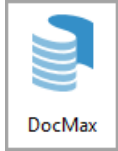


DocMax | Advanced Search and Saved Searches

Last Modified on 28/11/2024 8:55 am AEST



This article covers how to use the *Advanced Search* function in **DocMax**, and how to save them as a *Saved Search*. It also explains how to create, edit, and delete these *Saved Searches* in the *Administration tab*. The **DocMax** icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

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.

Advanced Searches

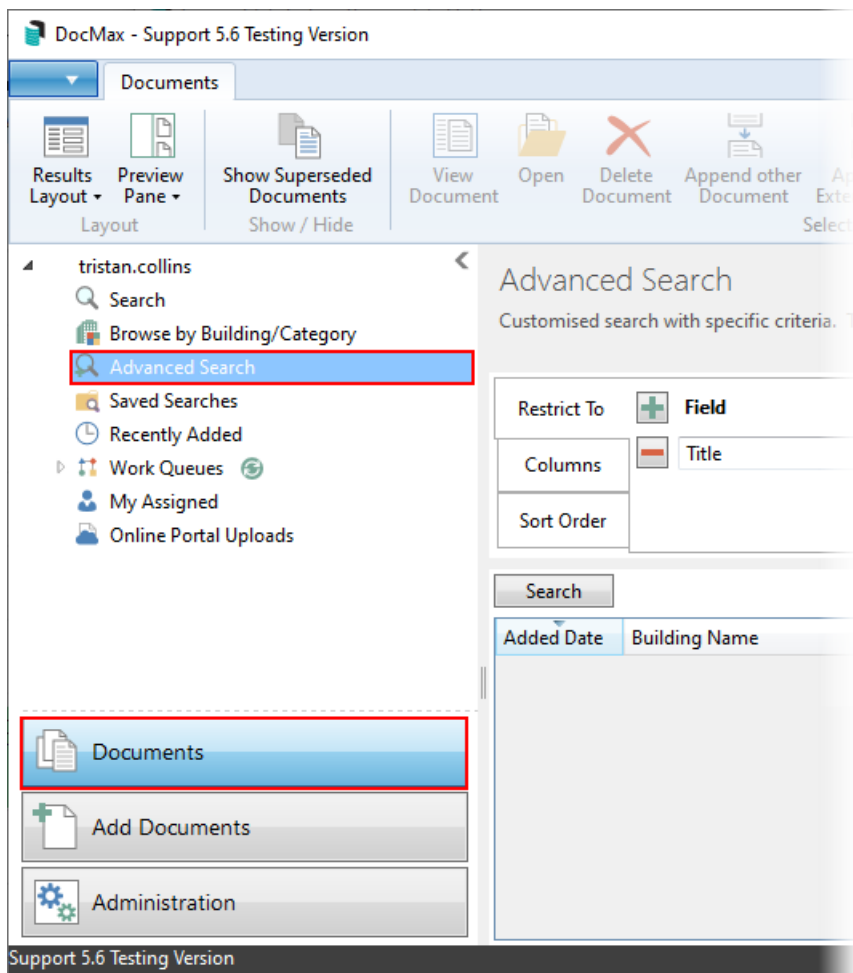
An *Advanced Search* has been designed to give users a more powerful method of locating documents in **DocMax**. If you use the default search options, *Browse by Building/Category* or *Search* without locating the required documents, you can use the *Advanced Search* function.

An *Advanced Search* enables you to search documents that match multiple filters, such as specific buildings, categories, keywords, and many, many more. The results of an *Advanced Search* are limited to the first 1000 documents, and the *Columns* and *Sort Order* can also be configured to allow the results to display more appropriately.

An *Advanced Search* can also be saved as a *Saved Search* for later use (see further down this page).

Create an Advanced Search

To create an *Advanced Search*, open **DocMax**, ensure you are in the *Documents* tab, then click the *Advanced Search* menu in the list on the left.



Restrict To

Upon opening the *Advanced Search* function, the *Restrict To* tab will be selected. This is where you configure the criteria or *filters* you want your search to have. Click the green '+' button to add a criteria, and click the red '-' button to remove that criteria. Each criteria has three options that need to be configured; **Field**, **Condition**, and **Value**.

1. Click the **Field** drop-down to select the filter you want to include.
 - Which filter you choose will depend on the type of document you want to search for, but we recommend including at least 'Building Name' (or number), 'Categories', and 'Title'.
2. The **Condition** drop-down options will change based on the *Field* you selected. For example:
 - If you selected 'Added Date' as the *Field*, the *Condition* drop-down will contain options that lend themselves accordingly.
3. The **Value** drop-down options will also change based on the *Field* and/or the *Condition* you selected. For example:
 - If you selected 'Added Date' as the *Field*, and 'is in the range' as the *Condition*, the *Value* will contain a tick box for a *Specific Dates* box and two date menus.
 - If you selected 'Added Date' as the *Field*, and 'is in the last 7 days' as the *Condition*, the *Value* will disappear entirely.
4. Once all filters have been added, click the *Search* button so test that the right types of documents are

being displayed.

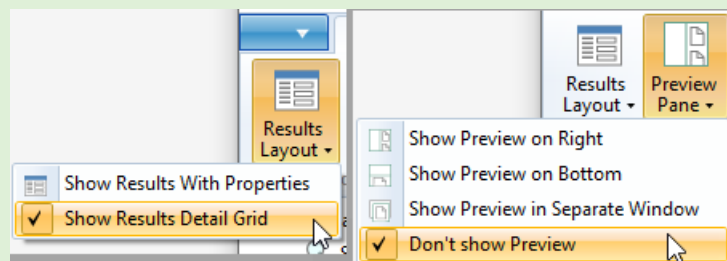
Here is an example of which **Fields**, **Conditions**, and **Values** you could configure for a generic document search.

| Restrict To | + | Field | Condition | Value |
|-------------|---|----------------|-----------------|---|
| Columns | - | Building Name | is any of | |
| Sort Order | - | Title | contains | |
| | - | Added Date | is in the range | <input checked="" type="checkbox"/> Specific Dates <input type="text"/> to <input type="text"/> |
| | - | Categories | is any of | |
| | - | Extracted Text | contains | |

Columns

After adding all the required fields in the *Restrict To* tab, you can determine which columns are displayed for this *Saved Search* as well as the order of the columns from left to right.

In order to see the columns, you will need to select 'Show Results Detail Grid' under the *Results Layout* option, and we recommend temporarily selecting 'Don't show Preview' under the *Preview Pane* option.



- Add more columns by selecting the column name in the *Available Columns* list on the left, then clicking the *Add>* button, which moves the column name to the *Displayed Columns* list on the right.
- Remove columns by selecting the name in the *Displayed Columns* list on the right, then clicking the *< Remove* button, which moves the column name to the *Available Columns* list on the left.
- Change the order of the columns by selecting a column in the *Displayed Columns* list on the right, and clicking the *up* or *down* arrow buttons. The column at the top of the list will be the first column in the search results.

Sort Order

The *Sort Order* tab shows the order in which the document results are displayed. By default, the results will be sorted in *Added Date* order, but can be configured to sort documents in the search results according to the fields

in the *Sorted Columns* list on the right, in the order that they appear in the list, and by the label on the button next to the field.

The screenshot shows a search interface with two main panels: 'Available Columns' on the left and 'Sorted Columns' on the right. The 'Available Columns' panel includes a 'Restrict To' section with a filter input, a 'Columns' list with items like 'Owner Name', 'Remove From Portal After Date', 'Should Upload For Invoice Hub', and 'Should Upload For Meeting Hub', and a 'Sort Order' section. The 'Sorted Columns' panel shows 'Added Date' (sorted 'Newest First'), 'Building Number' (sorted 'A to Z'), and 'Title' (sorted 'A to Z'). Below these panels is a search bar and a status indicator '20 records displayed'. The search results table has columns: 'Added Date', 'Building Name', 'Building Number', and 'Title'. The first row is highlighted in blue and has a red border around its header cells.

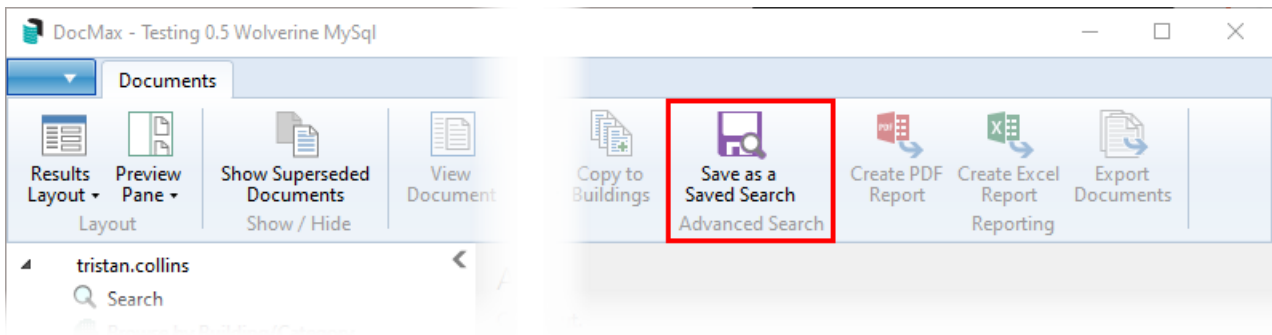
| Added Date | Building Name | Building Number | Title |
|------------|------------------------|-----------------|--------------------|
| 14/05/2021 | JAS TEST | 1J | Recoveries Invoice |
| 05/05/2021 | 1 FREESTONE DRIVE KEEP | 383785 | 123 |
| 05/05/2021 | | | Test 5 |
| 05/05/2021 | | | Test 5 |
| 05/05/2021 | | | Test 5 |

- Add more fields to sort by, by clicking the column name in the *Available Columns* list on the left, then clicking the *Add>* button, which moves the column name to the *Sorted Columns* list on the right.
- Remove columns by selecting the name in the *Sorted Columns* list on the right, then clicking the *<Remove* button, which moves the column name to the *Available Columns* list on the left.
- Change the sort order of the search results by selecting a column name in the *Sorted Columns* list on the right, and clicking the *up* or *down* arrow buttons, and then clicking the button next to each item. The sort order will then be reflected in the column headings of the search results.
- The heading will be highlighted, and an arrow will indicate the direction of the sort (A to Z; 0 to 9; earliest to latest, etc.), and can be changed by clicking a column header.
- If the search results are restricted and you click a column header, the *Advanced Search* will refresh and the results re-listed in the selected sort order. This ensures that the most relevant documents are not excluded from the list.

For performance reasons it's not possible to sort the search results with the following fields:

- Added From
- Applies To
- Categories
- Custom Properties
- Insurance Claim
- Insurance Policy
- Is Uploaded to Online Portal
- Portal Upload Status
- Search Words
- Transaction Reference

Once you have configured the Advanced Search to your liking, you can optionally save it as a *Saved Search* by clicking the *Save as a Saved Search* button in the DocMax ribbon at the top of the DocMax screen.

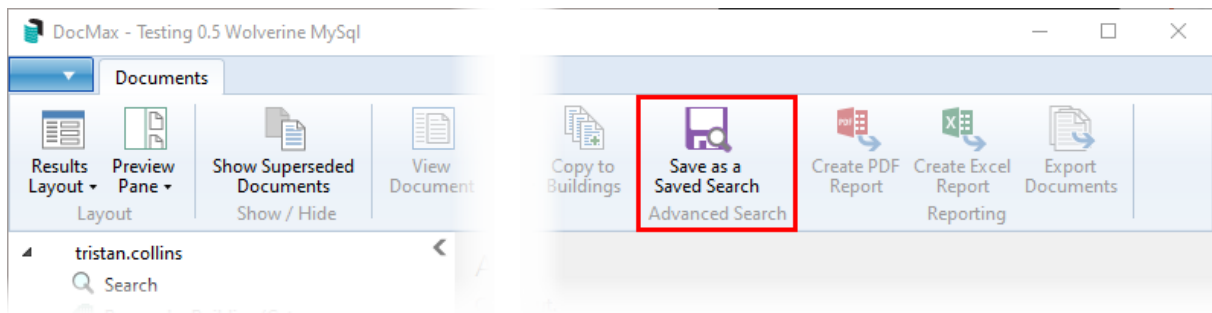


Saved Searches

A *Saved Search* is essentially an *Advanced Search* that has been saved so it can be used again and again. Saved searches can also be restricted to certain users or groups, which are managed in [Security Setup](#). If you cannot see a *Saved Search* that other users can, then it's most likely because the *Saved Search* is available to a security group that you are not a member of. If you cannot see a *Saved Search* that another single user can see, then it's most likely that their *Saved Search* was created using the *Advanced Search* function in the *Documents* tab and then saved as a *Saved Search*.

Basically, a *Saved Searches* can be created in two different ways:

- Use the *Advanced Search* function in the *Documents* tab, to set up the specific criteria, columns, and sort order, and then save the *Advanced Search* as a *Saved Search* by clicking the *Save as a Saved Search* button in the DocMax ribbon at the top of the DocMax screen. This will result in the *Saved Search* only being visible to that specific user unless it is then edited in the *Administration* tab, in the *Saved Searches* menu, and the *Available To* field is changed to another user or group.



- Open the [Administration](#) tab and use the *Saved Searches* function there.

To edit an existing *Saved Search* you will need access to the [Administration](#) tab where you can use the *Saved Searches* function there.

Saved Searches can define a specific field, conditions and values. Columns can be added or removed and a sort

order can be applied to the returned results. This is important to set as this cannot be manipulated when running the *Saved Search*. The below information is based on running *Saved Searches*. The first 1000 results will be displayed and exported to Excel or PDF. When exporting results it should be noted that all results will export regardless of the results returned.

Excluding or including BCMax System documents is a consideration when building an advanced search.

General Document Search

This example steps you through how to set up a general document search, which all users can use throughout your office. This is just one example to demonstrate how to add a *Saved Search*, but you can add any *Saved Search* you or your team members need.

Consider excluding *BCMax System* documents with a restriction as per step 6. Field: *Added From* is not equal to *BCMax System*. This will exclude any Arrerars, Levies, Ledger Cards (BCMax System) documents from reporting in the search.

1. In the *Administration* tab, select the *Saved Searches* option in the list on the left.
2. Click the *Add New* button (green cross) in the ribbon at the top.
3. Type 'Document Search' into the *Name* field.
4. The *Description* field isn't mandatory but it can be useful to explain what the purpose of this search is. This won't be visible anywhere else but this screen.
5. Change the *Available To* drop-down menu to 'Users' group as this will ensure this *Saved Search* will be available to all users.
 - Do not set this to 'Everyone' as this could potentially make the search available to external parties who are not in the 'Users' group.
6. In the *Restrict To* tab, add the required *Fields* by clicking the green plus button, then use the drop-down menu to select the field.
7. Then click the drop-down under the *Condition* Assign the *Condition* of restriction. In this example, *Building Name* with the condition of *is any of* will populate the StrataMax buildings to select from.
8. Leave the *Value* blank as this will be the variable that is used when running the search.
9. Repeat for further fields of restriction.
10. Once all fields of restriction have been added, go to *Columns* to review what columns are presented and in what order.
11. Following the *Column* sort order, go to *Sort Order* to apply preferences on the way the results are sorted.
12. Once the above has been reviewed, click *Save as a Saved Search*. Give the search a 'Name' and if required, give the search a description. Assign who the saved search is available to, either the User or a Group that the member is apart of.

Name: General Documents

Description:

Available To: Users

| Restrict To | Field | Condition | Value |
|-------------|----------------|-----------------|---|
| Columns | Building Name | is any of | |
| Sort Order | Title | contains | |
| | Added Date | is in the range | <input checked="" type="checkbox"/> Specific Dates <input type="text"/> to <input type="text"/> |
| | Categories | is any of | |
| | Extracted Text | contains | |

Invoice Saved Search

With document attachment available to Creditor Commitments, the below search is a guide to some of the fields of information that can assist with locating invoice type documents. These invoices can also be previewed via BCMMax; Transaction Lists, Preview Document and Linked Invoices and other various areas.

Consider excluding *BCMMax System* documents with a restriction as per step 3. Field: *Added From* is not equal to *BCMMax System*. This will exclude any Arrerars, Levies, Ledger Cards (BCMMax System) documents from reporting in the search.

1. Select *Advanced Search* to review the document property restrictions that can be configured.
2. Using the *Field* restriction, assign a criteria of restriction. For example: *Creditor* is the field restriction.
3. Assign the *Condition* of restriction. In this example, *Creditor* with the condition of *is equal to* will populate the BCMMax Local Creditor List to select from.
4. Leave the *Value* blank as this will be the variable that is used when running the search.
5. Repeat for further fields of restriction.
6. Once all fields in the *Restrict To* tab have been added, click the *Columns* tab to configure which columns are visible, and in what order they are presented across the screen.
7. Next, click the *Sort Order* tab to apply any sorting preferences that would be useful for the type of documents.
8. Once the above has been reviewed, click 'Save as a Saved Search'. Give the search a 'Name' and if required, give the search a description. Assign who the saved search is available to, either the User or a Group that the member is apart of.

Name: Invoices

Description: This search can be used to find invoices based off the Invoice Number, Amount & Creditor.

Available To: Users

| Restrict To | Field | Condition | Value |
|-------------|----------------------------|-----------------|---|
| Columns | Building Name | is any of | |
| Sort Order | Creditor | is equal to | |
| | Invoice Amount | is equal to | |
| | Invoice Date | is in the range | <input checked="" type="checkbox"/> Specific Dates <input type="text"/> to <input type="text"/> |
| | Invoice Number | contains | |
| | Is Building on Invoice Hub | is equal to | <input type="radio"/> Yes <input type="radio"/> No |
| | Categories | is any of | <input type="text"/> Invoices <input checked="" type="checkbox"/> |
| | Extracted Text | contains | |

Stored Report (BCMax System Documents)

The below provides a framework for DocMax and a saved search that will give the same functionality as what was available in **Stored Reports**. Information can be checked on a building and lot basis from the **Roll** from StrataMax.

This saved search is for *BCMax System* documents only. As per step 3, the restriction field: *Added From* is equal to *BCMax System*. This will include any Arrerars, Levies, and Ledger Cards and others (BCMax System) documents in the search.

1. Search or Select **DocMax**.
2. From the *Advanced Search* area or the *Administration* tab, use the *Saved Searches* area. Click *Add New* to create a new search.
3. Add the fields of restriction. The area for StrataMax documents is *Added From is equal to BCMax system*. Add any further fields of restriction to make the search user-friendly. Also, review the *Columns* area and include relevant column display. The *Sort Order* area can be defined too if required.
4. Click *Save Changes* if creating via the *Administration Tab*, ensuring you make this search *Available To* the appropriate user or group. Or if started from the *Advanced Search* area, click *Save as a Saved Search* and assign the *Available To* area.

Name:

Description:

Available To:

| Restrict To | Field | Condition | Value |
|-------------|------------------|-------------|--|
| Columns | Building Name | is equal to | <input type="text"/> X |
| Sort Order | Building Number | contains | <input type="text"/> X |
| | Added From | is equal to | BCMax System X |
| | Lot | contains | <input type="text"/> X |
| | Lot Account Code | contains | <input type="text"/> X |
| | Email Recipient | contains | <input type="text"/> X |
| | Added Date | is on | <input type="checkbox"/> Specific Dates <input type="text"/> |
| | Title | starts with | <input type="text"/> X |

Review Results ✔ 605 records displayed

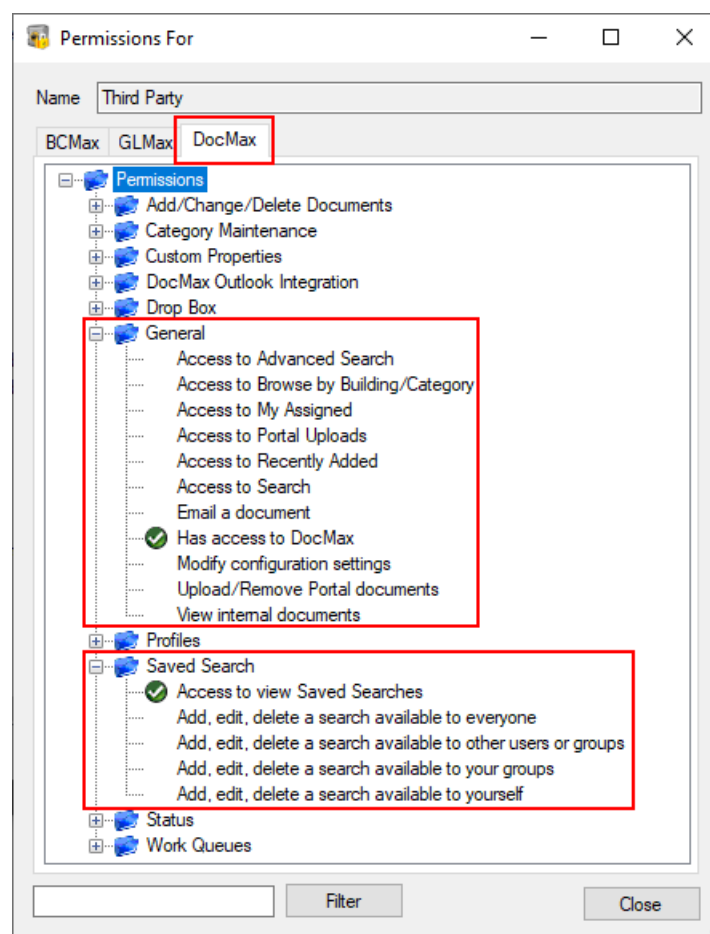
| Added Date | Building Name | Building Number | Title | Description | Lot Accou | Email Recipient |
|------------|---------------|-----------------|--------------------------|------------------|-----------|---------------------------------|
| 20/06/2023 | | | Lana Letter | Lana Letter | 02100001 | support@stratamax.com.au |
| 20/06/2023 | | | Name and Address | Name and Address | | test1@email.com;test2@email.com |
| 20/06/2023 | | | Name and Address | Name and Address | | developer@email.com |
| 20/06/2023 | | | Name and Address | Name and Address | | |
| 20/06/2023 | | | Name and Address | Name and Address | | |
| 20/06/2023 | | | Name and Address | Name and Address | | |
| 20/06/2023 | | | Name and Address | Name and Address | | |
| 20/06/2023 | | | Keri | Keri | 02100240 | |
| 20/06/2023 | | | Levy Notice | | 02100240 | |
| 19/06/2023 | | | ELECTRICITY ARREARS 19/0 | | 02100038 | |
| 16/06/2023 | | | ELECTRICITY ARREARS 16/0 | | 02100172 | |
| 16/06/2023 | | | ELECTRICITY ARREARS 16/0 | | 02100095 | |
| 16/06/2023 | | | ELECTRICITY ARREARS 16/0 | | 02100054 | |
| 16/06/2023 | | | ELECTRICITY ARREARS 16/0 | | 02100038 | |
| 16/06/2023 | | | ELECTRICITY ARREARS 16/0 | | 02100201 | |
| 16/06/2023 | | | ELECTRICITY ARREARS 16/0 | | 02100180 | |
| 16/06/2023 | | | ELECTRICITY ARREARS 16/0 | | 02100178 | |
| 16/06/2023 | | | ELECTRICITY ARREARS 16/0 | | 02100168 | |
| 16/06/2023 | | | ELECTRICITY ARREARS 16/0 | | 02100145 | |
| 16/06/2023 | | | ELECTRICITY ARREARS 16/0 | | 02100130 | |
| 16/06/2023 | | | ELECTRICITY ARREARS 16/0 | | 02100124 | |
| 16/06/2023 | | | ELECTRICITY ARREARS 16/0 | | 02100115 | |

Third Party/External Users Saved Search

This type of saved search will allow for external users, such as auditors, to search for specific documents. It is assumed that the external user has already been granted access to your StrataMax, and have been added to the appropriate security group in [Security Setup](#), where permissions are set appropriately for third parties. See [External Parties/Users Group](#) for more info.

We also have the [Security Setup & External Parties Remote Access Video](#), which covers the Security Setup process.

Once the group has been set up and the external users have been added to the security group, only the following two DocMax permissions should be set to 'Allow' (green tick), whilst the rest should be set 'Inherit' (no icon).



This is giving limited access by particular document fields, allowing the external user to enter or select documents by based on category, title, or other fields depending on the external user's requirements. If access to a specific building's documents is required, then you will need to configure this in the *Saved Search*, and will need to be changed each time when access to a different building is needed. The below *Saved Search* is only an example of what fields could be suitable for external users.

1. In the *Administration* tab, select the *Saved Searches* option in the list on the left.
2. Click the *Add New* button (green cross) in the ribbon at the top.
3. Type 'External User' or something else appropriate for the external user into the *Name* field.

4. The *Description* field isn't mandatory, but can be useful to explain what the purpose of this search is. This won't be visible anywhere else but this screen.
5. Change the *Available To* drop-down menu to the group that has been set up in the **Security Set** up menu for external users (see [External Parties/Users Group](#) for more info).
 - This will ensure this *Saved Search* will only be available to any users in that security group.

| Restrict To | Condition | Value |
|----------------|----------------------|--|
| Building Name | is equal to | Select a specific building from your portfolio or leave it blank if you'd like the external user to be able to select any building |
| Title | contains | Blank (this field will be specific for each search) |
| Categories | is any of | Blank (this field will be specific for each search) |
| Description | contains | Blank (this field will be specific for each search) |
| Extracted Text | contains | Blank (this field will be specific for each search) |
| Added Date | is in the range | Blank (this field will be specific for each search) |
| Categories | is <u>not</u> any of | Category not included for third party search |

6. Once all fields in the *Restrict To* tab have been added, click the *Columns* tab to configure which columns are visible, and in what order they are presented across the screen.
7. Next, click the *Sort Order* tab to apply any sorting preferences that would be useful for the external users.
8. Click the *Save Changes* button (purple floppy disk icon) at the top of the screen, in the ribbon.

Test the visibility and functionality of the *Saved Search* by logging into the StrataMax server as the external user.