DocMax | Work Queues

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This article explains how to set up and use *Work Queues* in ***DocMax***. Work Queues can be configured to show specific document types, support team-based processing, and help manage document workflows across your office.

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.

Feel free to also watch this *DocMax Work Queues and Saved Searches video*

Work Queues | Introduction

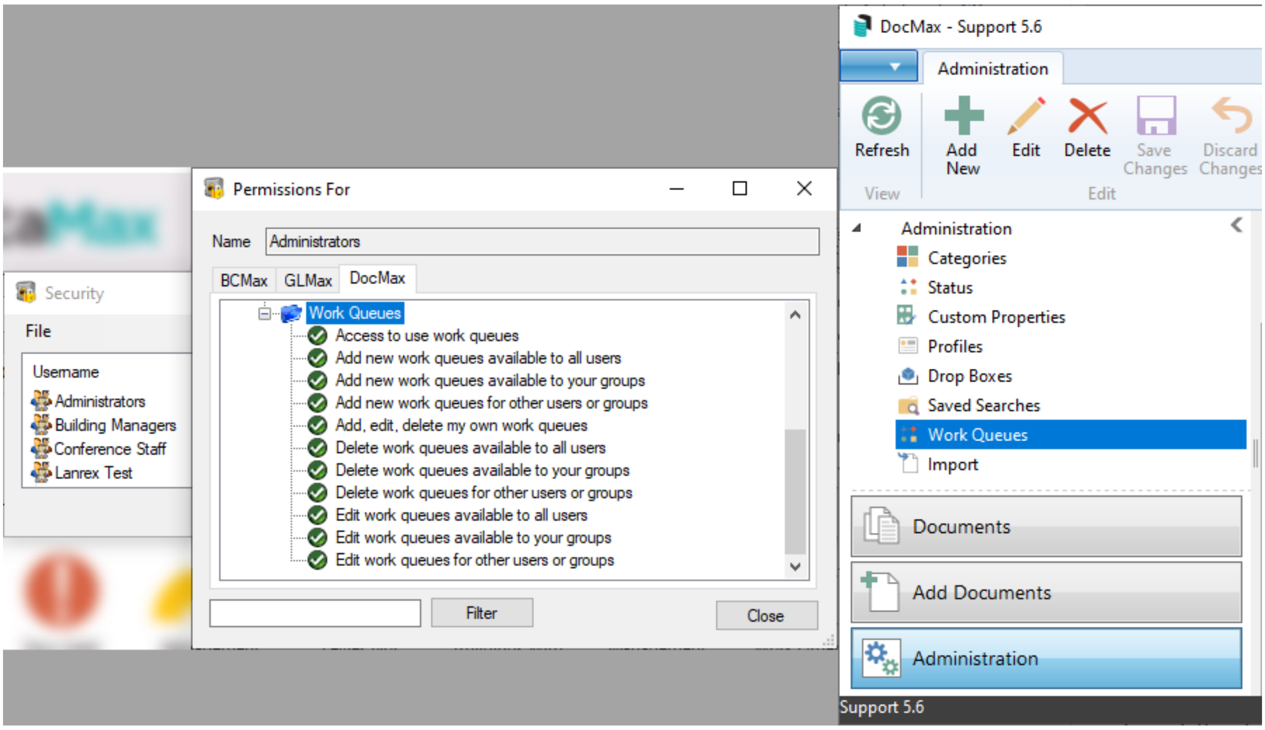
Work Queues help manage common document processes by acting like folders for selected document types. Each work queue can be configured with restrictions so that only the required documents are displayed.

Documents must be added to ***DocMax*** first before they will appear in a work queue.

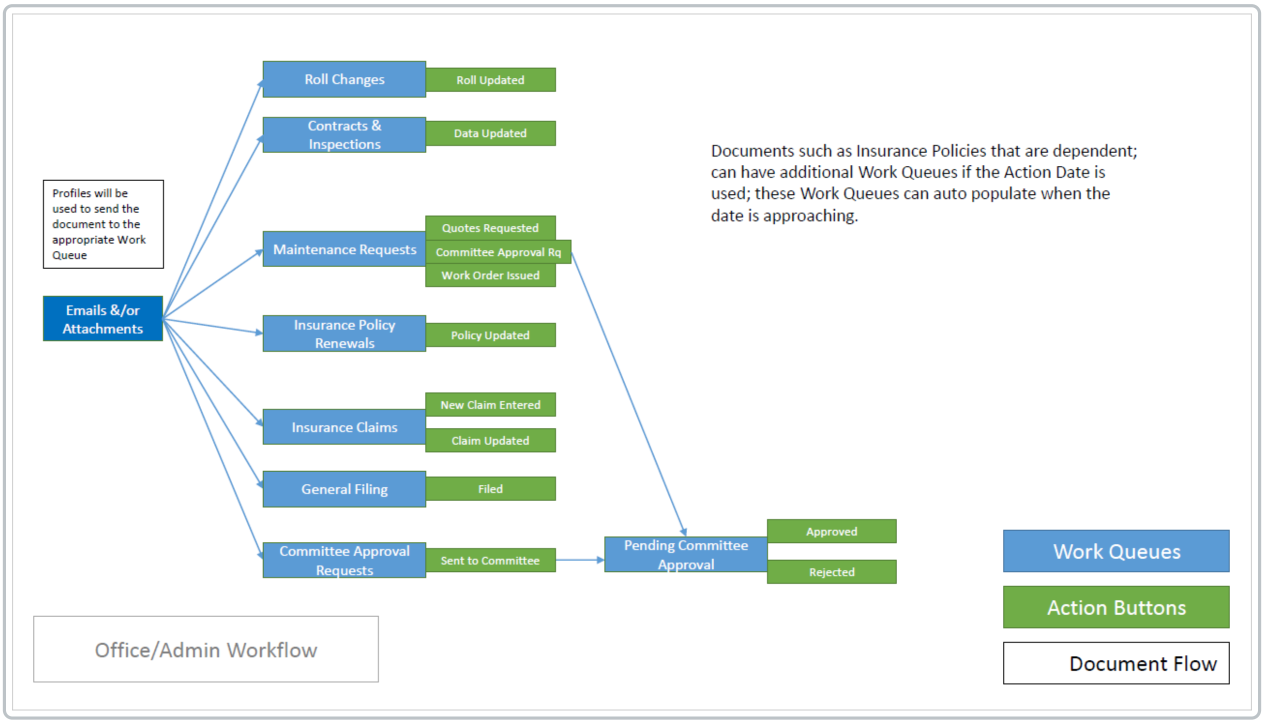
Work Queues can also include *Action Buttons*. These buttons apply selected updates to a document and can move the document to another queue or remove it from the current queue.

Work Queues | Security Setup

Creating, editing and deleting work queues is done in the *Administration* area in ***DocMax***. Users must have the appropriate permissions in ***Security Setup*** before these options are available.



Work Queues | Example for Correspondence



Optimized query performance condition fields

When setting up a work queue, the condition selected can affect performance. The following options are recommended from best performance to least efficient.

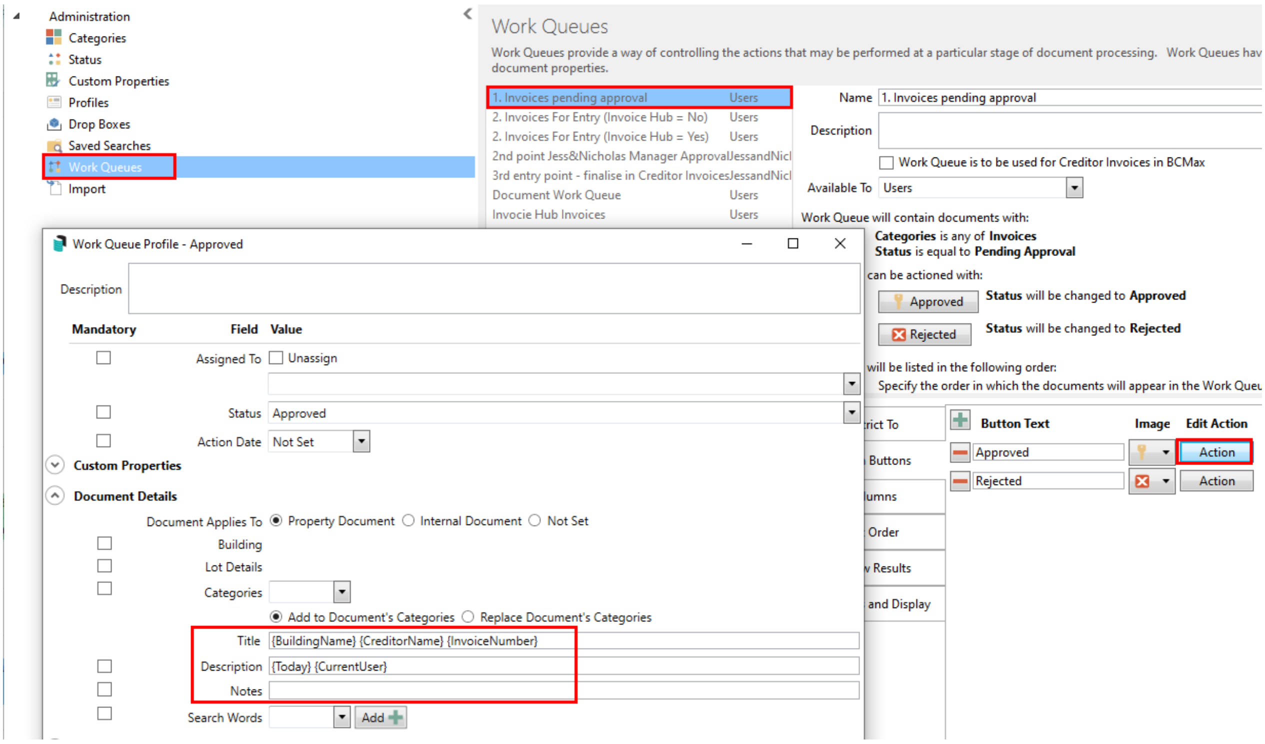
Equals is the fastest option because it returns an exact match.

Starts With is generally the next most efficient option because it searches from the beginning of the text.

Contains is the least efficient option because it searches more broadly and may increase query time.

Work Queues | Action Button Merge Fields

Merge fields can be used in the *Title*, *Description* and *Notes* fields of an action button. These values are populated automatically when the action button is used.



Building info merge fields

These fields are populated from the *Building Information* screen in StrataMax.

- Building Name / Company Title: {BuildingName}

- Financial Year Start: {FinancialYearStart}
- Financial Year End: {FinancialYearEnd}

Creditor invoice merge fields

Creditor and invoice merge fields are populated after the**Invoice Details** section has been completed. When the final action button is used to create the transaction, the applicable creditor and invoice merge field values will then populate.

This also applies when using *DocMax Work Queues* with *Action Buttons* to process invoices.

- Creditor Name: {CreditorName}
- Invoice Number: {InvoiceNumber}
- Invoice Amount: {InvoiceAmount}
- Invoice Date: {InvoiceDate}

DocMax-specific merge fields

- Today - computer date: {Today}
- Current Username: {CurrentUser}
- Action Date: {ActionDate}

Formatting for date merge fields

By default, date fields are displayed as DD/MM/YYYY. Date merge fields can be formatted manually, for example:

```
{InvoiceDate: yyyy-MM-dd}
```

This will display as 2026-08-29.

The following components can be used when formatting a date merge field:

- yyyy = Year (for example, 2026)
- yy = Year (for example, 22)
- MM = Month (for example, 08)
- MMMM = Month (for example, August)
- dd = Day (for example, 29)

The formats can be used independently or together, as shown below.

Field and Formatting	Display Example
{InvoiceDate: yyyy}	2026

{InvoiceDate: yyyy-MM-dd}	2026-08-29
{InvoiceDate: dd/MM/yy}	29/08/26
{InvoiceDate: MMMM yyyy}	August 2026

Add a New Work Queue

Use the steps below to create a new work queue.

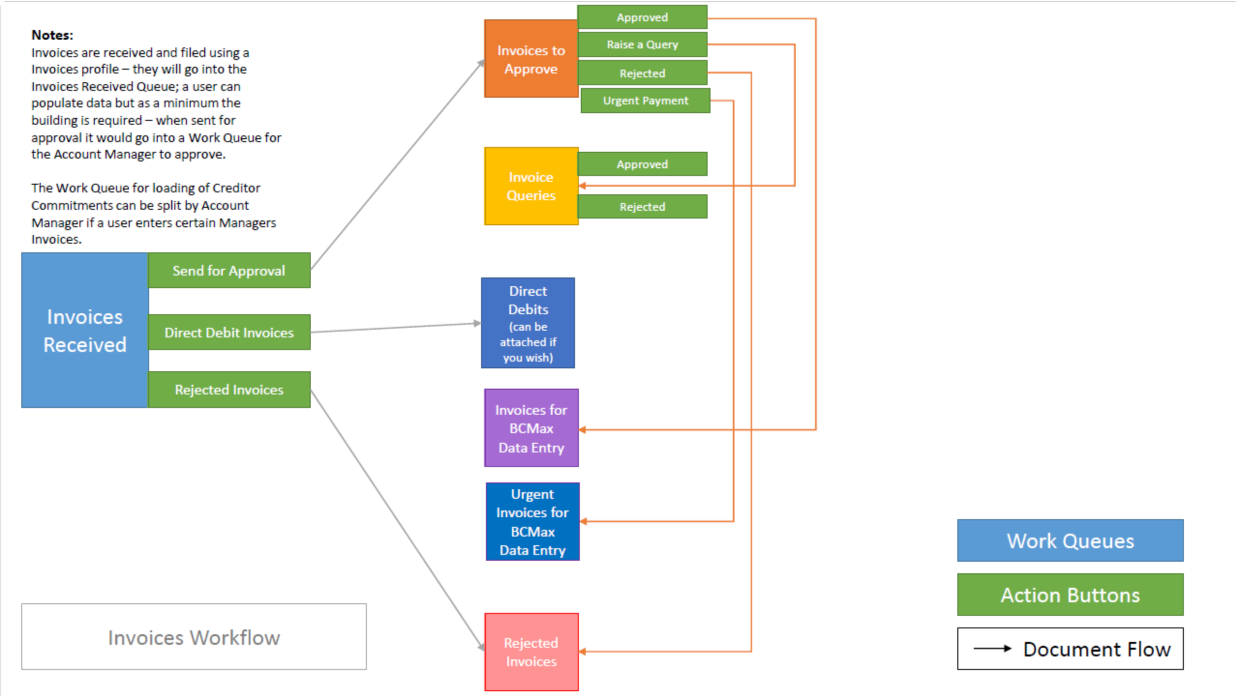
1. Select the *Administration* tab.
2. Select *Work Queues*.
3. Click *Add New*.
4. Enter the *Name* and *Description* for the work queue.
5. Select who the work queue will be *Available To*. This can be a user, group or everyone, based on the users and groups set up in ***Security Setup***.
6. Select the *Restrict To* tab to define which documents will appear in the work queue. Add the required restriction fields using the available field list and set the condition and value for each one. Include at least one of the following fields:
   - Assigned To
   - Status
   - Action Date
   - Categories
7. Select the *Action Buttons* tab and add the buttons required to update or move documents.
8. Review the *Columns*, *Sort Order*, *Review Results*, *Tab Fields and Display* sections.
9. Click *Save Changes*.

Recommended restriction fields

For many work queues, the recommended restriction fields are *Status* and *Categories*. These are the simplest fields to use when moving documents between queues or identifying documents that have reached a final status.

Work Queues | Creditor Invoices

Work Queues can be used with ***Creditor Invoices*** to support invoice processing from receipt through to final review. A work queue can be used as a single-step process or as part of a multi-step approval workflow.



Here is an example of what a series of Work Queues could look like

Work Queue Setup | Creditor Invoices

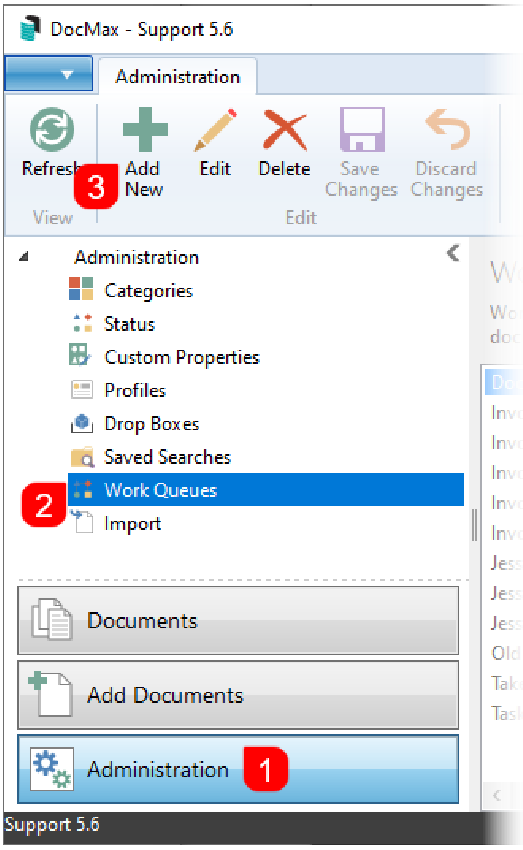
This example sets up a work queue for invoices that have just been received and added to ***DocMax***, ready for processing in ***Creditor Invoices***. It also includes a visible button for invoices that are not ready to process and a hidden system action for invoices finalised from the ***Creditor Invoices*** screen.

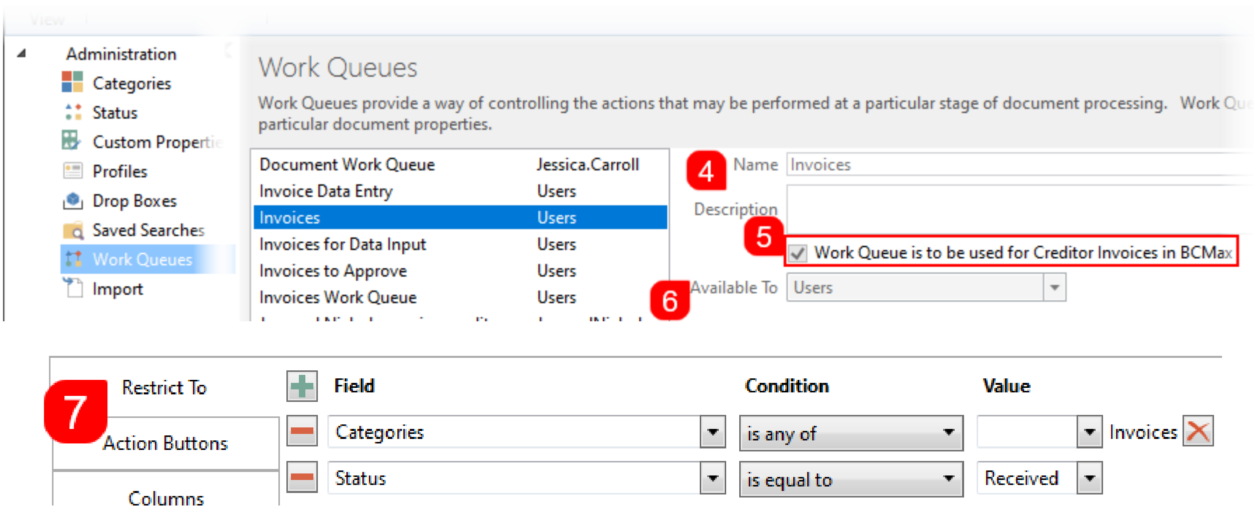
Using merge fields such as *{Today}* and *{CurrentUser}* can help record who processed the invoice and when.

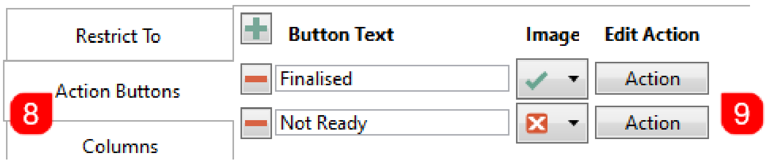
1. Search for or select ***DocMax***.
2. Select the *Administration* tab.
3. Select *Work Queues*.
4. Click *Add New*.
5. Enter the work queue *Name* and *Description*.
6. Tick *Work Queue is to be used for Creditor Invoices in BCMax*
7. Select who the work queue will be *Available To*. It is generally recommended not to use *Everyone*, as this may include external groups such as search agents or auditors.
8. Select the *Restrict To* tab and add the required restrictions. For a basic invoice work queue, include:
    - *Categories > is any of > Invoices*
    - *Status > is equal to > Received*
9. Select the *Action Buttons* tab and add the required buttons. For example, one button for *Finalised* and one for *Not Ready*.
10. Select the *Action* button for each action button and configure the required updates.
11. For the *Finalised* button, update the *Status* to *Finalised*. You can also add merge fields such as

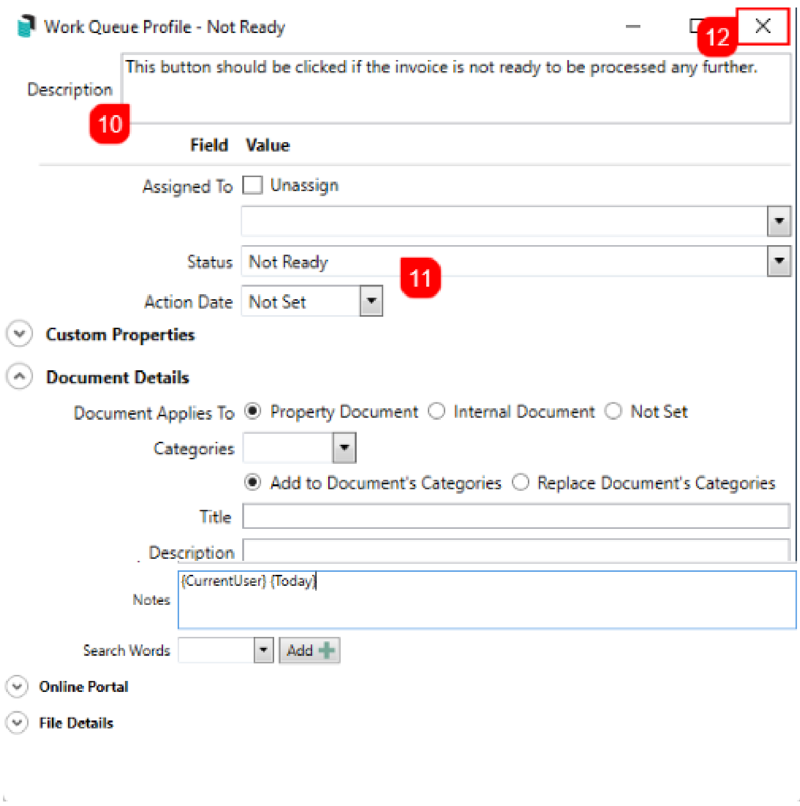
{Today} and *{CurrentUser}* to the *Notes* field.

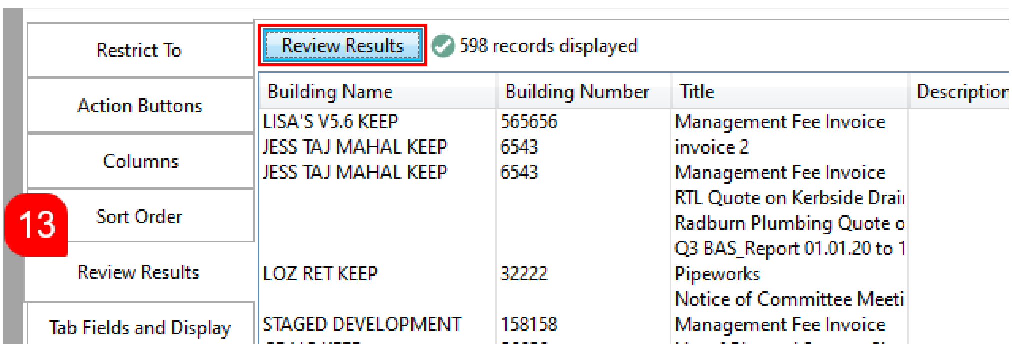
12. For the *Not Ready* button, update the *Status* to *Not Ready*.
13. Close the action button configuration window.
14. Select the *Review Results* tab and confirm that the queue contains the expected documents.
15. Select the *Tab Fields and Display* tab and enable *Show this section expanded* for the sections that should open by default, such as *Document Details* and *Invoice Details*.
16. Review the work queue summary.
17. Click *Save Changes*.

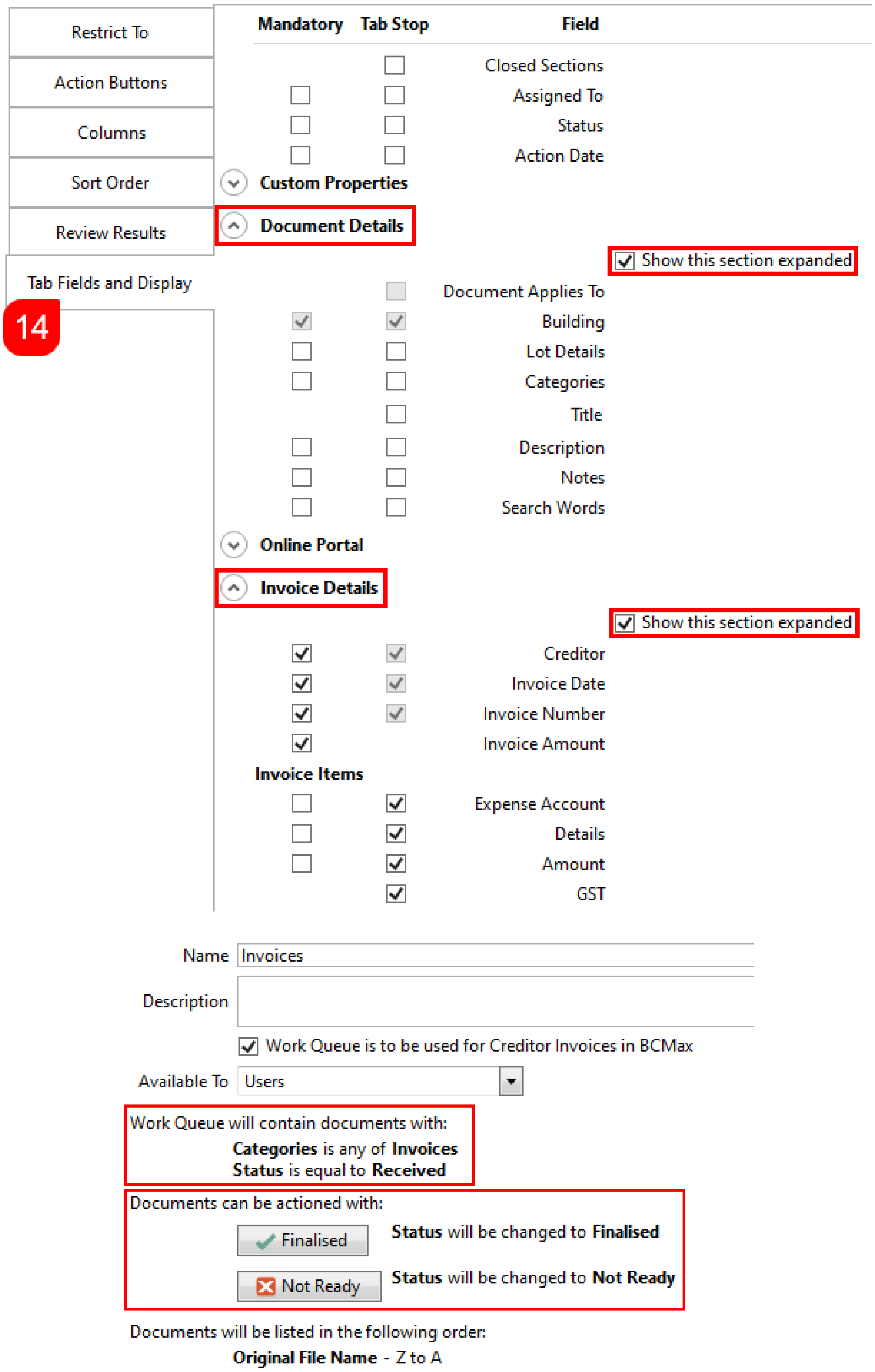





Restrict To
Action Buttons
Columns
Button Text
Image
Edit Action
Finalised
Action
Not Ready
Action
8
9


Work Queue Profile - Not Ready
12
Description
This button should be clicked if the invoice is not ready to be processed any further.
10
Field
Value
Assigned To
Unassign
Status
Not Ready
11
Action Date
Not Set
Custom Properties
Document Details
Document Applies To
Property Document
Internal Document
Not Set
Categories
Add to Document's Categories
Replace Document's Categories
Title
Description
Notes
{CurrentUser} {Today}
Search Words
Add
Online Portal
File Details


Restrict To
Action Buttons
Columns
Sort Order
Review Results
Tab Fields and Display
13
Review Results
598 records displayed
Building Name
Building Number
Title
Description
LISA'S V5.6 KEEP
565656
Management Fee Invoice
JESS TAJ MAHAL KEEP
6543
invoice 2
JESS TAJ MAHAL KEEP
6543
Management Fee Invoice
LOZ RET KEEP
32222
Pipeworks
Notice of Committee Meeti
STAGED DEVELOPMENT
158158
Management Fee Invoice



Useful Restrict To fields for invoice-related work queues

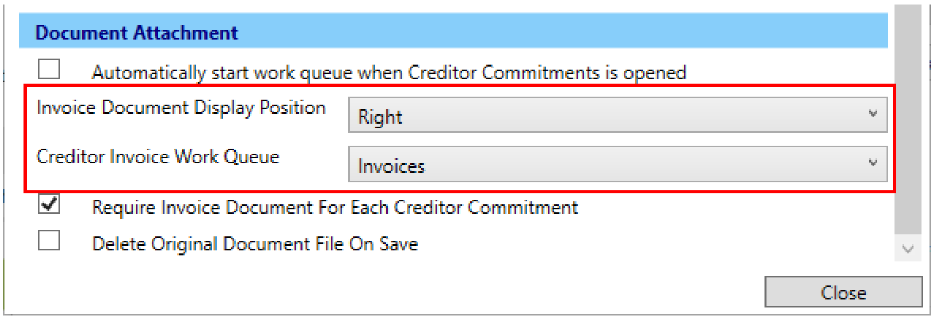
The following *Restrict To* fields can help refine invoice-related work queues:

- *Invoice Manual Entry* – Use the condition *is equal to* and select *Yes* or *No*.
- *Creditor Invoice* – Use the condition *is equal to* and select *Yes* or *No*.
- *Scheduled Creditor Invoice* – Use the condition *is equal to* and select *Yes* or *No*.

Creditor Invoices Work Queue Setup

Two settings are required in ***Creditor Invoices*** for the work queue to function correctly. See *Document Attachment* for more information about the related settings.

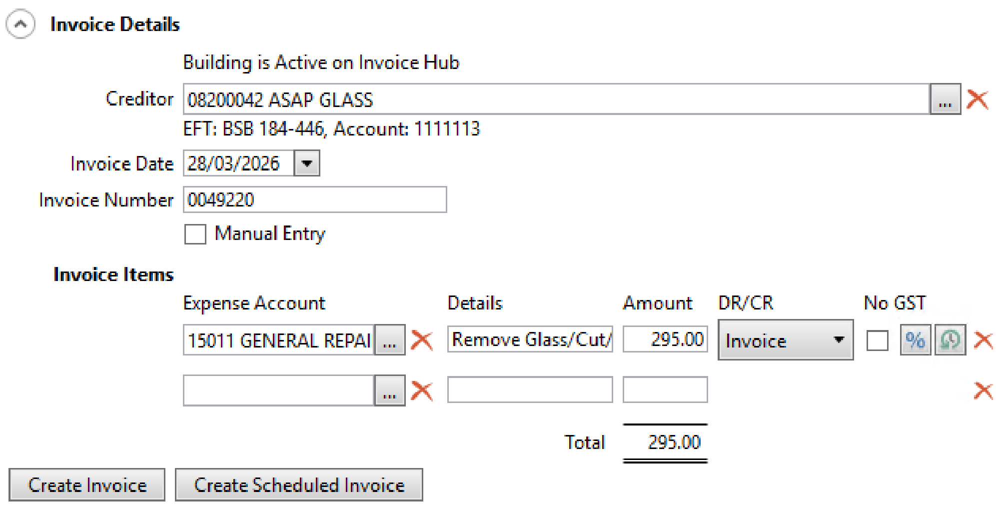
1. Search for or select ***Creditor Invoices***.
2. Select *File > Configure* and scroll to the *Document Attachment* section.
3. Select the required *Invoice Document Display Position*.
4. Select the required *Creditor Invoice Work Queue*.



Creditor Invoice Document Properties

When creditor information is entered in ***DocMax***, the *Invoice Details* section uses the same data entry fields as ***Creditor Invoices***.

Once the building and creditor have been entered, the creditor bank account details and Invoice Hub status will display.



Manual Entry

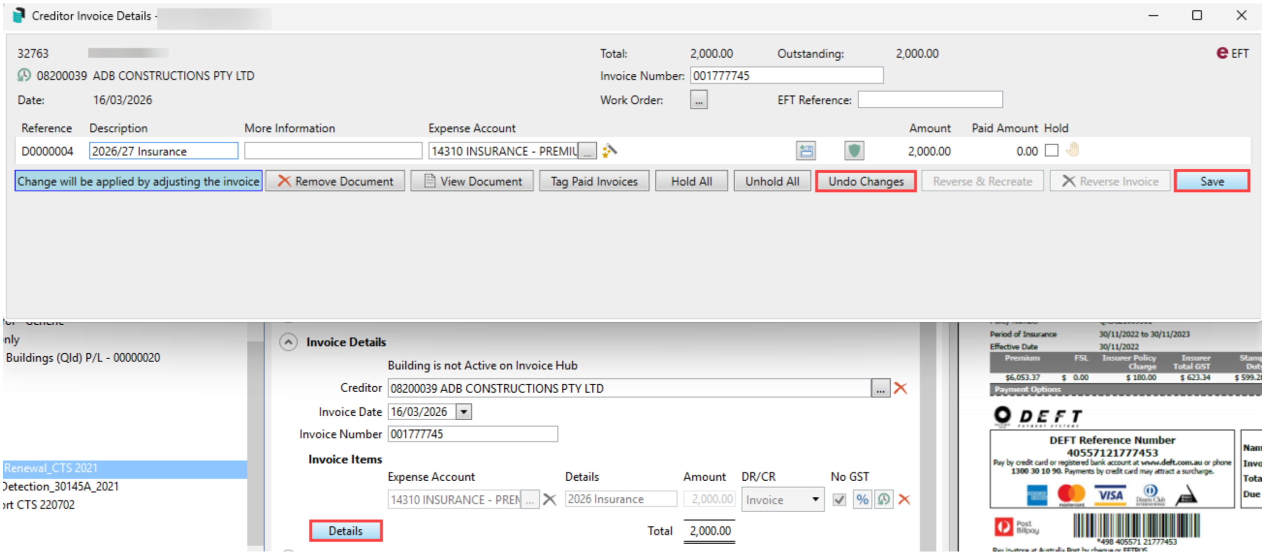
The *Manual Entry* tick box excludes invoices from the ***Creditor Invoices*** *Auto Create All* option. This allows additional actions to be completed before the invoice is finalised.

- Add Purchase to Asset Register
- Bill to Owner

- Pro Rata

Create Invoice

The invoice can be created directly in DocMax using the *Create Invoice* button. Once created, the button changes to *Details*, where the transaction can be reviewed or edited. Select *Save* to update the information or *Undo Changes* to discard them.



Edit a Work Queue

Use the steps below to update an existing work queue.

1. Select the *Administration* tab.
2. Select *Work Queues* and choose the required queue.
3. Click *Edit*.
4. Update the required section of the work queue.
5. Review the *Tab Fields and Display* settings and confirm that any required *Tab Stops* and *Mandatory* fields are selected.
6. Use *Review Results* to confirm the changes are correct.
7. Click *Save Changes*.

Delete a Work Queue

> Once a *Work Queue* is deleted, it cannot be recovered.

1. Select the *Administration* tab.
2. Select *Work Queues* and choose the required queue.
3. Click *Delete*.

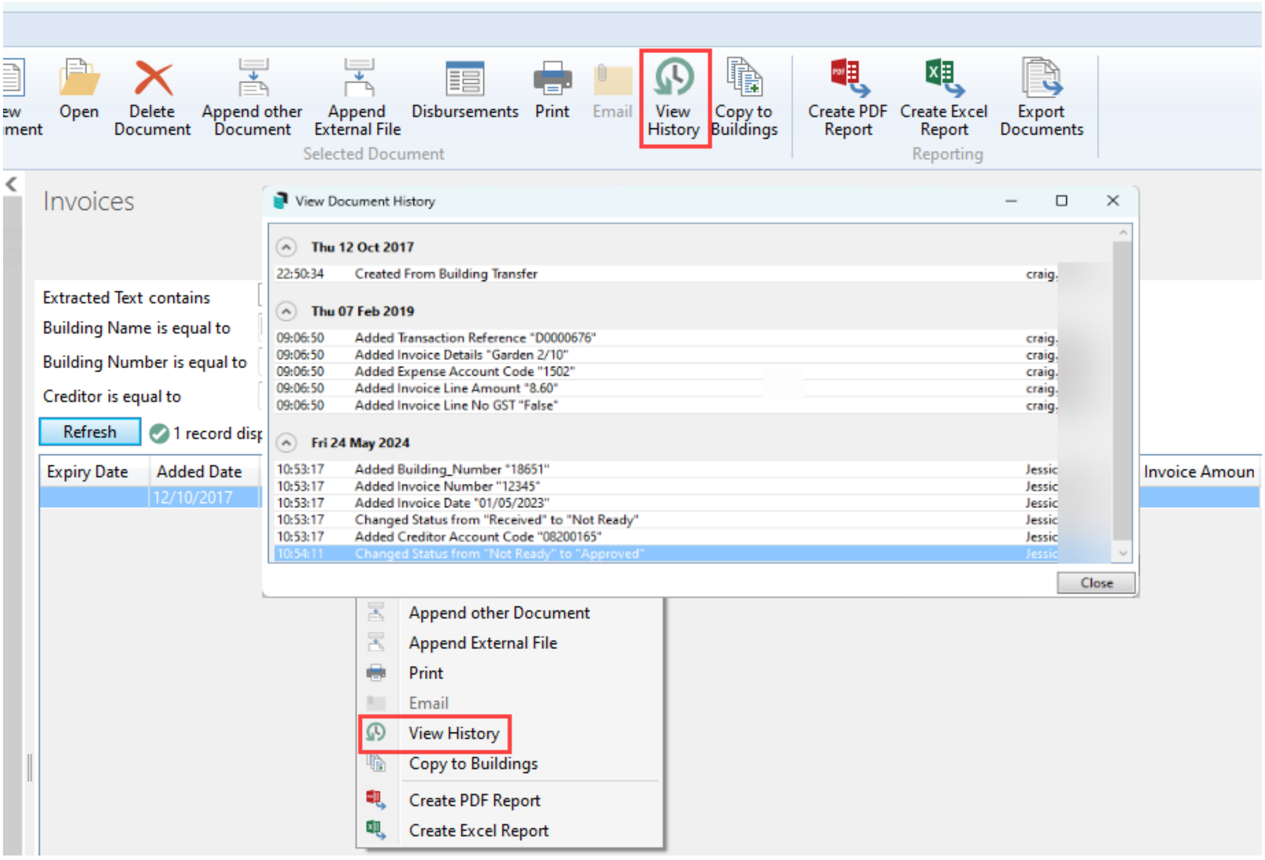
4. Confirm the deletion.

Document History

As documents move through work queues, document history is recorded with date and time stamps. This can be used to review who processed a document and when.

To view document history:

1. Search for or select ***DocMax***.
2. Locate the required document.
3. Right-click the document, or use the ribbon to select *View History*.
4. Review the document and property updates shown in the history.



Work Queues system performance

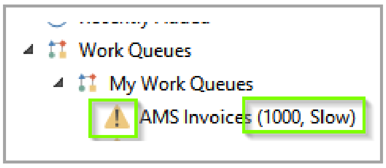
The work queues available to each user depend on the security group they belong to. Work queues can also be created for an individual user if the required permission has been granted in ***Security Setup***.

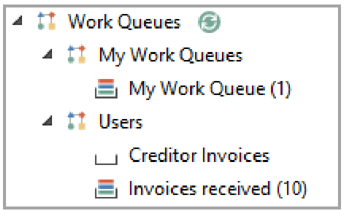
Work queues update at least every 5 minutes, depending on *DocMax Settings*, and can also be refreshed manually.

If the system detects slow query performance, an alert icon may appear next to the work queue. When more than 1000 documents are returned, the count is truncated to 1000 to reduce the impact on resources.

This change is scheduler-driven and must be activated by the Development Team upon request. Please email support@stratamax.com.au if you would like to use this feature.

The appearance of a work queue folder changes depending on whether documents are waiting in the queue.





- When empty, an empty tray icon will display next to the work queue name: 
- When the work queue contains documents, a full tray icon will display next to the work queue name: