

DocMax | Online Portal Uploads

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This article covers the *Online Portal Uploads* sections in **DocMax**. This is where documents are placed while they are awaiting automated synchronisation. This can be for the upload of new documents, the removal of pending documents, as well as the update of documents.

However, before you can upload any documents, you must first set up the *Document Groups* on the StrataMax Portal itself. To learn how to set these up, check out the [StrataMax Portal | Report & Documents](#) article.

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 Portal Documents Video

Your browser does not support HTML5 video.

Pending Upload and Pending Removal Status


Synchronisation occurs automatically, and documents should be available on the Portal within a few minutes. Note, however, that any delay will be due to multiple building uploads occurring at the same time.

When opening the *Online Portal Uploads* area, two default statuses are defined: *'Pending Removal'* and *'Pending Upload'*. These are the documents that will be uploaded or removed on the automated synchronisation schedule.

1. Select *Online Portal Uploads*.
2. Use the *Portal Upload Status* drop-down menu to filter the list, or if required remove a status by clicking its delete button (red cross).
3. Click *Refresh* to display the new results.


Online Portal Uploads

Review documents that have been selected to be available on the StrataMax Online Portal. The synchronise buttons will upload or remove documents immediately.

Building 

Online Portal Document Group

Portal Upload Status Pending Removal, Pending Upload

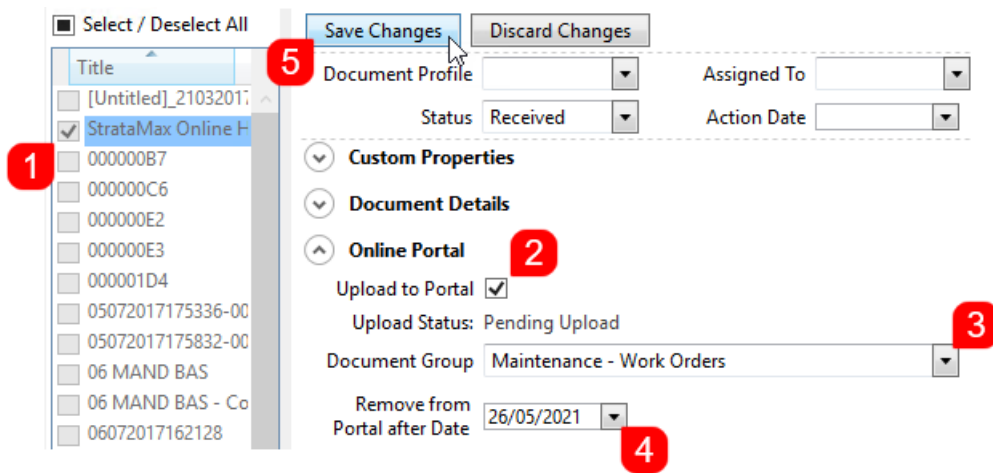
 1 record displayed

Added Date	Assigned To	Portal Upload Status	Title	Description	Online Portal Document Group	Remove From	Building Number
24/10/2025		Pending Upload	agm_notice_2				

Adding Documents to the StrataMax Portal

The synchronisation happens automatically, and documents should be available on the Portal within a few minutes. Note, however, that if there is a delay, it will be because multiple building uploads are happening at the same time.

1. In **DocMax**, locate and select the document to display its properties.
2. Expand the **Online Portal** section and tick the *Upload to Portal*/tick box.
3. Select the *Document Group* from the drop-down menu.
 - These *Document Groups* are set up on the [StrataMax Portal](#).
4. Select a specific date or expiry period by clicking the *Remove from Portal after Dated* drop-down menu.
5. Click the Save Changes button.



6. This will place the document in the *Online Portal Uploads* section of DocMax with a *Portal Upload Status* of 'Pending Upload'.
7. The document will be uploaded automatically when the scheduled nightly building upload task has completed.

Removing Documents from the StrataMax Portal

The synchronisation happens automatically, and documents should be available on the Portal within a few minutes. Note, however, that if there is a delay, it will be because multiple building uploads are happening at the same time.

1. In **DocMax**, open the *Online Portal Uploads* section.
2. Use the *Building*, *Online Portal Document Group*, and *Portal Upload Status* filters to narrow the list if required.
3. Once the document has been located, double-click it or right-click it and select *View Document*.
 - The document will display in a separate window, with its properties.
4. Expand the **Online Portal** section and untick the *Upload to Portal* tick box.
5. Click the *Save and Close* (3.5" Floppy Disk) icon in the ribbon at the top.
6. This will change the document status to 'Pending Removal.'
7. The document will be automatically removed when the scheduled nightly building upload task completes.

Updating Document Titles displayed on the StrataMax Portal

The synchronisation happens automatically, and documents should be available on the Portal within a few minutes. Note, however, that if there is a delay, it will be because multiple building uploads are happening at the same time.

Documents that are available online may need a title change if requested from an Owner/ Committee

Member, or there may be a requirement internally to change the the document title. This can be done simply from the Online Portal Uploads area in DocMax.

1. Open the *Online Portal Uploads* section of **DocMax**.
2. Use the *Building, Online Portal Document Group, and Portal Upload Status* filters to narrow the list if required.
3. Once the document has been located, double-click it or right-click it and select *View Document*.
4. Update the *Title* field.

The **Online Portal** section can also be updated at this time e.g. *Remove from Portal Date, Document Group* if required. The document can also be split if needed and re-saved to create separate documents at this point.

5. Click *Save and Close* to update the information.

The screenshot shows the 'Document' edit interface in DocMax. At the top, there is a toolbar with icons for 'Preview Pane', 'Save and Close' (highlighted with a red box), 'Open', 'Delete Document', 'Print', 'Email', 'View History', and 'Copy to Buildings'. Below the toolbar, the 'Document' section has a title field with the placeholder text 'This is the title field that displays on Portal'. Further down, there are dropdown menus for 'Document Profile', 'Assigned To', 'Status', and 'Action Date'. The 'Custom Properties' section is expanded to show 'Document Details', which includes radio buttons for 'Property Document' (selected) and 'Internal Document'. Below these are fields for 'Building', 'Lot Details', 'Owner', 'Category' (with 'Invoices - Creditor', 'Invoices', and 'Invoices' selected), 'Title' (highlighted with a red box and containing the placeholder text), 'Description', and 'Notes'. There is also a 'Search Words' field with an 'Add +' button. The 'Online Portal' section is expanded to show 'Upload to Portal' (checked), 'Upload Status: Pending Removal', 'Document Group: Group 20 Documents', and 'Remove from Portal after Date: 22/12/2017'. Other collapsed sections include 'Invoice Details', 'Document Source', 'File Details', and 'References'.

6. The document will be synchronised automatically when the scheduled nightly building upload task has completed.

StrataMax Portal Document Groups and Display

The StrataMax Portal *Document Groups* that are configured will display their description in **DocMax**. This works specifically for the *Owners Reports* and *Documents* that have been set up on the *StrataMax Portal*. These steps describe how to review and compare what is configured in **DocMax Profiles** versus what is set up on the StrataMax Portal.

1. Once logged into the StrataMax Portal as an Administrator, go to the *Reports and Documents* tab, then *Manage*.
2. In the *Select User Type* drop-down menu, select *Owner* and note the *Group Name* and *Display Name*.

Group Name	Display Name	Fee Applies?	Charge Amount	Access	Hide Descriptions
Group 1 Reports	Owner Reports	False	\$0.00	Access is Granted (no charge)	<input type="checkbox"/>
Group 1 Documents	AGM Minutes	False	\$0.00	Access is Granted (no charge)	<input type="checkbox"/>
Group 2 Documents	Committee Minutes	False	\$0.00	Access is Granted (no charge)	<input type="checkbox"/>
Group 3 Documents	House Rules	False	\$0.00	Access is Granted (no charge)	<input type="checkbox"/>
Group 6 Documents	Articles	True	\$0.00	Access is Granted (no charge)	<input type="checkbox"/>

3. In **DocMax**, click the *Administration* menu, then select *Profiles*.
4. Select the required profile and expand the **Online Portal** section to see the *Document Group* field matches what is currently available via the StrataMax Portal.

Profiles
A profile is a template which can be used to apply a standard set of properties to a document.

Name: AGM Minutes
Description: AGM Minutes

Mandatory	Tab Stop	Field	Value
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Closed Sections	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Assigned To	Unassign
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Status	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Action Date	Not Set

Document Details

Online Portal

Show this section expanded

Upload to Portal

Document Group: AGM Minutes

Remove From Portal After: 7 Years

Locked Documents

Documents produced by StrataMax are locked and will not be available for bulk upload to the Portal. There will be a yellow warning to confirm *one or more selected documents are finalised and cannot be updated*.

Advanced Search

One or more selected documents are finalised and cannot be updated

Restrict To	Field	Condition	Value
Columns	Is Locked	is equal to	<input checked="" type="radio"/> Yes <input type="radio"/> No
Sort Order			

Search

Select / Deselect All

Title
<input checked="" type="checkbox"/> Status Report
<input checked="" type="checkbox"/> Status Report
<input checked="" type="checkbox"/> Status Report
<input checked="" type="checkbox"/> Pest Control - Generic
<input checked="" type="checkbox"/> Status Report
<input checked="" type="checkbox"/> Levy Notice
<input checked="" type="checkbox"/> Levy Notice
<input checked="" type="checkbox"/> Levy Notice
<input checked="" type="checkbox"/> Levy Notice
<input checked="" type="checkbox"/> Levy Notice
<input checked="" type="checkbox"/> Levy Notice
<input checked="" type="checkbox"/> Levy Notice
<input checked="" type="checkbox"/> Levy Notice
<input checked="" type="checkbox"/> Levy Notice
<input checked="" type="checkbox"/> Levy Notice

Assigned To

Status Action Date

Document Details

Category

Search Words

Online Portal

Unavailable - Not all documents have a building selected.

Upload to Portal?

Document Group

Remove from Portal after Date

These are available to upload on a individual basis using the following areas.

