DocMax | Administration

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This article covers the *Administration* tab within ***DocMax***. To open this menu, click the *Administration* button in the bottom left.



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.

This article does not, however, cover Work Queues or Saved Searches. Due to their size and complexity, each of these topics are covered in their own articles, and a video:

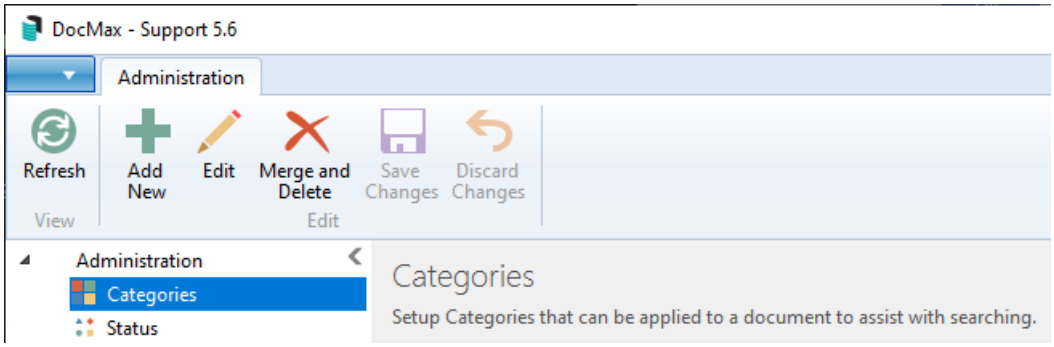
- *DocMax | Work Queues*
- *DocMax | Advanced Search and Saved Searches*
- *DocMax Work Queues and Saved Searches video*

DocMax Categories

Categories are document properties that help users search for and locate documents. Every document should have at least one category, and multiple categories can be applied when required.

Categories can be added and edited. To delete a category, it must be merged into an existing category using *Merge and Delete*.

DocMax includes default system categories, which link documents across different areas and modules in **StrataMax**. System categories can be renamed and support system processes.



Adding a Category

1. From the *Administration* tab, click the *Categories* menu.
2. Click *Add New* from the ribbon.
3. Enter the name of the category (maximum 40 characters).
4. Click *Save Changes* to add the new category or *Discard Changes* to cancel.

Edit a Category

1. From the *Administration* tab, click Categories.
2. Highlight the category to be edited, then click *Edit.*
3. Amend the category name (maximum 40 characters).
4. Click *Save Changes* to update the category name.

All documents, *Saved Searches* & *Work Queues* that had the category that was edited, will have the category name updated.

> If the *Discard Changes* button is clicked, the changes will not be saved and the category will revert to the original name.

Merge and Delete a Category

It is recommended to create an *Advanced Search* or use an existing *Saved Search* with the *Category* before completing a merge, to ensure the correct action is being taken.

1. From the *Administration* tab, click *Categories*.
2. Highlight the category to be deleted.
3. Click *Merge and Delete* from the ribbon.
4. A list of categories will be displayed. Select the category for the deleted category to be merged into, then click *Merge.*
    - All documents containing a category which was deleted, will be replaced with name of the category that it was merged into.

Categories used by other areas of StrataMax cannot be deleted. These categories are Building Plans, Building Photos & Management Fee Contracts.

> If you accidentally merge or delete the wrong category, recreate it, then run an advanced search to locate these documents and bulk-update them to split the category.

System Categories

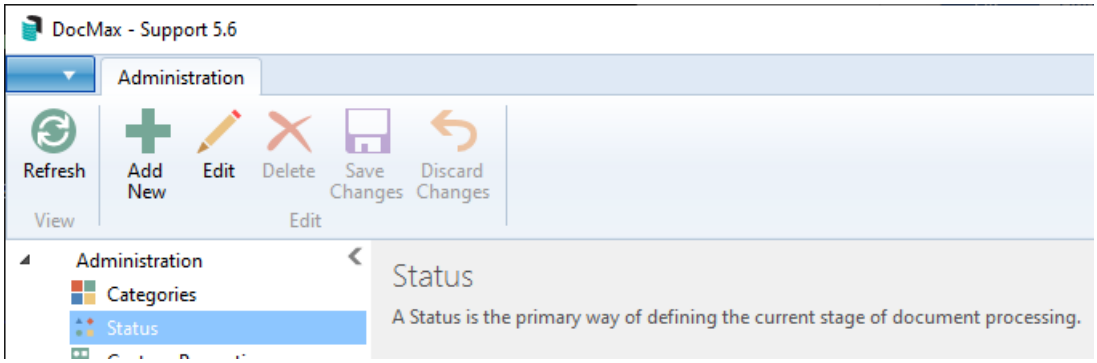
The following system categories are available to link between StrataMax and DocMax and can be renamed.

- Stored Reports
- Management Fee Contracts
- Building Photos
- Building Plans
- Meeting Hub Meeting Notices
- Meeting Hub Meeting Minutes
- Quotes
- Invoices
- Certificate Of Classification

DocMax Statuses

Document Statuses can be configured which describe the various stages of document processing. Statuses are designed to be used in conjunction with Work Queues to assist with the document workflow.

> Once created, Statuses can be renamed or deactivated but cannot be deleted.



Add a Status

1. From the *Administration* tab, click *Status.*
2. Click *Add New* from the ribbon.
3. Enter the name of the Status (maximum 40 characters)
4. Click *Save Changes* to add the new status or *Discard Changes* to cancel.

Edit a Status

1. From the *Administration* tab, click *Status.*
2. Highlight the status to edit, then click *Edit.*
3. Amend the status name (maximum 40 characters).

4. Click *Save Changes* to update the status name.

All documents, *Saved Searches* & *Work Queues* that had the Status that was edited, will have the Status name updated.

> If the *Discard Changes* button is clicked, the changes will not be saved and the status will revert to the original name.

Deactivate a Status

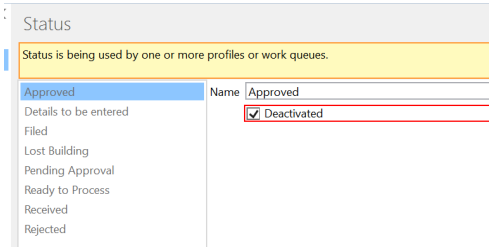
Deactivating a 'Status' will ensure that it can no longer be set for a document. Any document that was previously set with the 'Status' will be retained.

1. From the *Administration* tab, click *Status.*
2. Highlight the status to deactivate, then click *Edit*.
3. Tick the Deactivated checkbox.
4. Click *Save Changes* to update the Status.

> A 'Status' can only be deactivated if it is not included in any profiles or work queue actions.

If the status is currently being used within a profile or work queue action, the following message will appear when the 'Deactivated' checkbox is checked and the *Save* button will be disabled.

The profile or work queue that uses this status will need to be amended to allow the status to be updated.



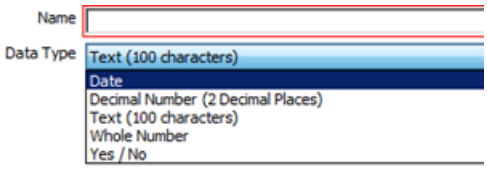
DocMax Custom Properties

Create additional property fields that can be used in profiles, searching and work queues. These properties cannot be deleted; however they can be hidden or deactivated. Custom Properties allow configuration of additional Document Properties to suit their specific needs. If a Custom Property has been deactivated (but not hidden) it will still be shown in the Document Properties with any value that was set previously, but it will not be able to be changed to a new value. If a Custom Property has been hidden it will not appear within the Document Properties.

Add a Custom Property

Care must be taken when choosing a data type for a Custom Property as it cannot be changed. The following data types are available for selection:

1. From the *Administration* tab, click *Custom Property.*
2. Click *Add New* from the ribbon.
3. Enter the name of the Custom Property (maximum 40 characters).
4. Select the *Data Type* to ensure that the correct data will be entered for each document.
5. Click *Save Changes* to add the new custom property.



Deactivate a Custom Property

Deactivating a custom property ensures that it can no longer be set for a document, but any value that was set previously will be retained.

1. From the *Administration* tab, click *Custom Property.*
2. Highlight the custom property to edit, then click *Edit.*
3. Tick the *Deactivated* checkbox.
4. Click *Save Changes* to update the custom property.

Once a custom property is deactivated, it will still appear throughout the system showing any values that were set previously, but a new value cannot be set for a document. The custom property will still be listed in the custom property configuration screen and may be reactivated in the future if required.

Hide a Deactivated Custom Property

A deactivated custom property can also be hidden so that it no longer appears anywhere in the system. Hiding a custom property ensures that any values that were set previously may still be accessed in the future by displaying the custom property again.

1. From the *Administration* tab, click *Custom Property.*
2. Highlight the custom property to edit, then click *Edit.*
3. Amend the ‘Name’ or 'selection boxes' as required.
4. Click *Save Changes* to update the custom property.

A custom property can only be hidden if it is also deactivated. It may also be restored by editing the

entry and un-ticking the *Hidden* and *Deactivated* boxes.

DocMax Profiles

Profiles can be added, edited or deleted, based on setup of security permissions. As profile applies document properties such as statuses, categories and text in fields, it is possible to delete profiles without changes to the document properties. A document profile may be selected when adding or updating the document properties for a single document.

A document profile can only be selected and applied to a single document. The document profile selection field will be unavailable when multiple documents are selected.

A document profile can be used to:

- Populate document properties with certain values based on the document type.
- Set certain document properties to be mandatory, to ensure that information is entered before changes can be saved.
- Set certain document properties to include a *Tab Stop* at required fields, to assist in bulk document processing.
- Determine which sections are expanded or collapsed, making it easier to go straight to the document properties that are most relevant.
- Provide consistent control of what documents are uploading to the Online Portal and fixed time periods.

Once a profile is selected, the profile settings will be applied to the current document properties. These document properties may include a set of properties that can populate directly to a Work Queue. Some document properties can replace the existing properties if they are already set, and some will add to existing properties.

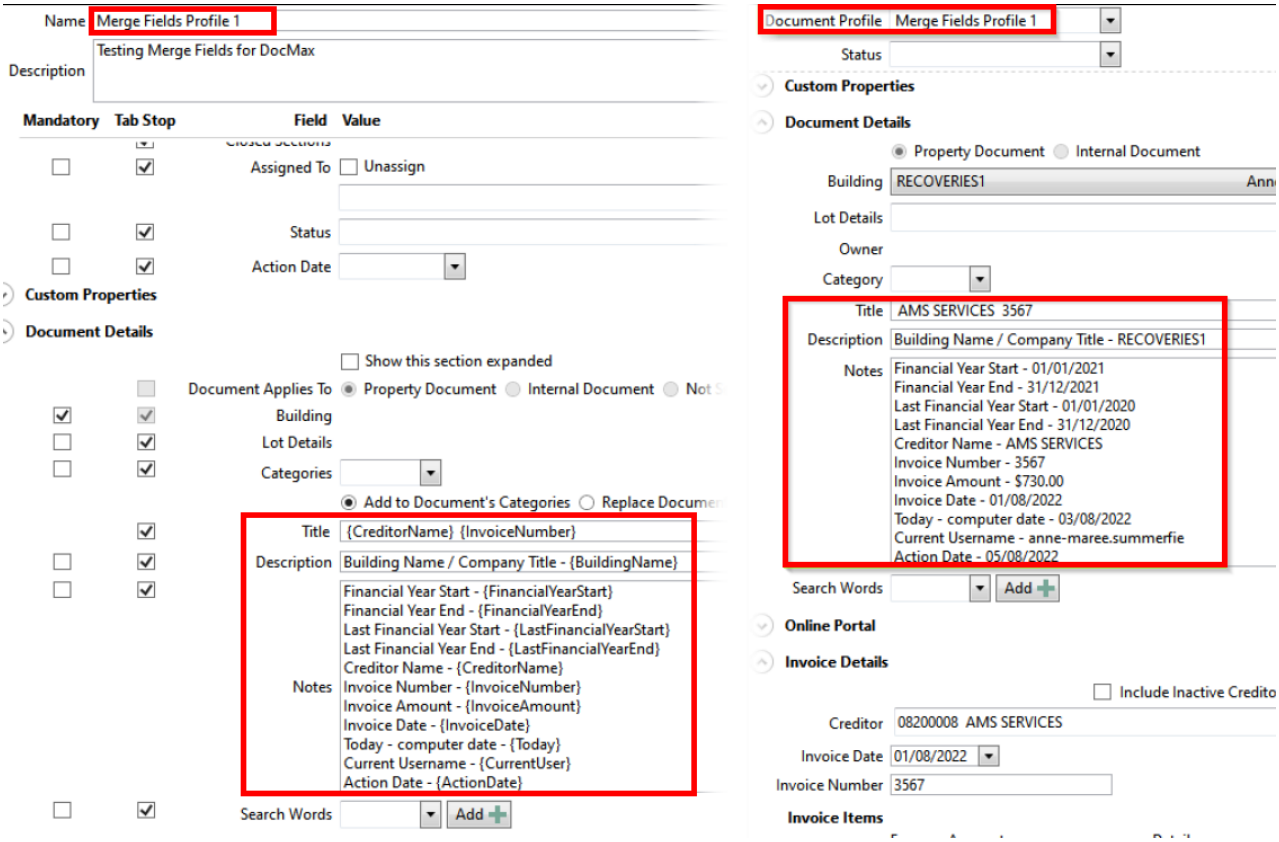
Categories can be set to 'Replace Existing Categories' or 'Add to Existing Categories' in the *Profile*. 'Search Words' and 'Notes' will add to existing properties, whilst all other properties will replace any existing properties.

DocMax Profile Merge Fields

In DocMax merge fields can be applied in the *Title*, *Description* & *Notes* fields from within the *Profiles* screen. By using these fields, the data from within StrataMax will populate into those merge fields.

A few important things to be aware of with DocMax merge fields:

- The merge fields need to be manually typed in (can be copied & pasted from this article).
- For building specific merge fields to populate, the building must be selected prior to selecting the profile.
- For creditor and invoice related merge fields, the data won't be merged until after the **Invoice Details** section has been populated and then the profile with merge fields has been applied. This is also true when using *DocMax Work Queues* with *Action Buttons* to process invoices; the **Invoice Details** section should be filled in whilst the invoice document is being added to DocMax and places it into the first Work Queue. Then each *Action Button* in that Work Queue should include the creditor and invoice related merge fields.

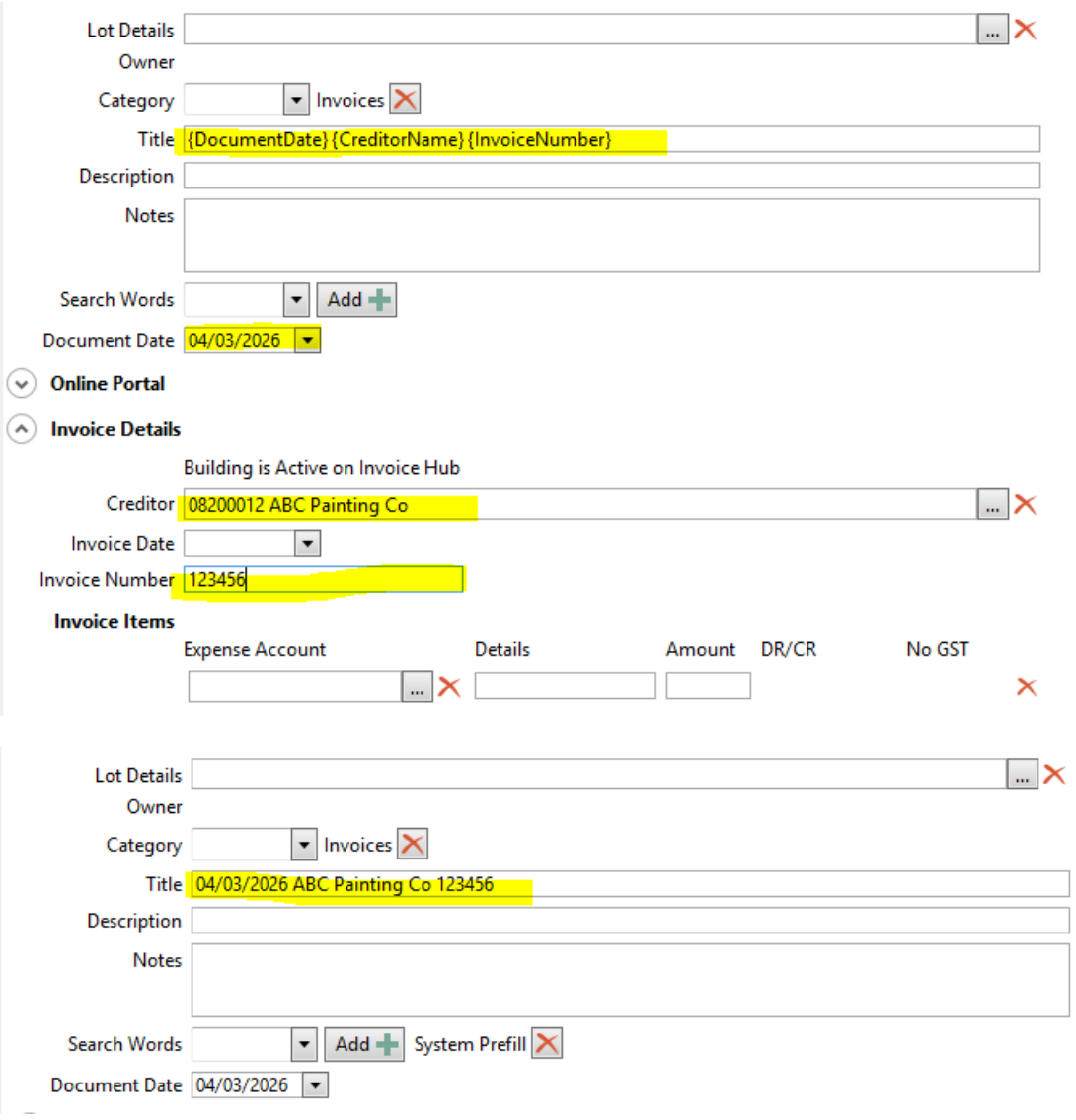


Specific fields that can be used are:

- Building Name / Company Title: {BuildingName}
- Document Date {DocumentDate}
- Financial Year Start: {FinancialYearStart}
- Financial Year End: {FinancialYearEnd}

- Creditor Name: {CreditorName}
- Invoice Number: {InvoiceNumber}
- Invoice Amount: {InvoiceAmount}
- Invoice Date: {InvoiceDate}
- Today - computer date: {Today}
- Current Username: {CurrentUser}
- Action Date: {ActionDate}

Example of Merge Fields being used: Document Date, Creditor Name & Invoice Number:



Formatting for Date Merge Fields

By default, any date field will be presented as DD/MM/YYYY (29/08/2022 for example). However, date fields can be formatted by manually typing some characters within the merge field as follows:

{InvoiceDate: yyyy-MM-dd}

This will result in the date being displayed as 2022-08-29.

The components that can be used in the formatting are as follows (note that these are case sensitive):

- YYYY = Year (e.g. 2022)
- YY = Year (e.g. 22)
- MM = Month (e.g. 08)
- MMMM = Month (e.g. August)
- DD = Day (e.g. 29)

The formats can be used on their own or together, as seen in the following examples for the {InvoiceDate} merge field.

Field and Formatting	Display Example
{InvoiceDate: yyyy}	2022
{InvoiceDate: yyyy-MM-dd}	2022-08-29
{InvoiceDate: dd/MM/yy}	29/08/22
{InvoiceDate: MMMM yyyy}	August 2022

Add a Profile

1. From the *Administration* tab, click *Profiles*.
2. Click *Add New* from the ribbon.
3. Enter the name of the profile. Make the name relevant to the document type the profile will be used for. For example 'Meeting Minutes'.
4. Enter a description which explains what the profile will do.
5. Review document properties and set as necessary.
6. Tick the check boxes to determine whether a document property is mandatory and must be completed.
7. Tick the check boxes to determine whether a document property has a tab stop. When the tab key is used, it will go to or skip that document property.
8. Click *Save Changes* to save the profile.

Entry of mandatory document properties is only enforced when the profile is manually selected by the

user. Mandatory document properties are ignored when the profile is applied via automatic channels such as a drop box, or the Outlook add-in.

When any of the following document properties are marked as mandatory, the building selection will also become mandatory, and the document will automatically be marked as a property document:

- Lot selection
- Creditor selection
- Expense account selection
- Upload to Portal (Y/N)

For example, by making the *Lot Details* field mandatory, the *Building* field will also automatically become mandatory and the *Document Applies To* field is automatically set to 'Property Document'.

Edit a Profile

Editing a profile will allow the document properties to be changed for documents being currently filed. It should be noted that any changes applied to the profile will not retrospectively update any documents that have used this profile in the past.

1. From the *Administration* tab, click *Profiles*.
2. Highlight the profile to edit, then click *Edit*.
3. Amend the document properties of the profile as required.
4. Click *Save Changes* to save the amended profile.

Delete a Profile

1. From the *Administration* tab, click *Profiles*.
2. Highlight the profile to delete, then click *Delete*.
3. When prompted select *Yes* to delete the selected profile.

> Once a profile is deleted it cannot be reactivated at a later stage, it can be recreated if required.

DocMax Drop Boxes

A Drop Box allow documents to be added to DocMax quickly and easily by placing the document file into a Windows folder. This can either be on your own PC, or on the StrataMax server.

A Drop Box can be configured with two different methods of adding documents to DocMax:

- It can be added to DocMax with a profile applied to the added document.

  or
- It will prompt the user to enter the details of the document manually, via the 'Add Document' window.

Multiple Drop Boxes can be set up, and they can be edited or deleted based on the user's security permission. Once the Drop Box has been added, the user needs to be have StrataMax open for the Drop Box to become monitored. This is a user setting and will need to mapped by the individual user to move documents into the Drop Box. If a staff member is the primary user of a commonly used Drop Box and does not have StrataMax open, the Drop Box will not be monitored and therefore not add documents to DocMax.

It is very beneficial to set up a Drop Box for the network folder where a scanner has been configured to store newly scanned documents.

When setting up a Drop Box within DocMax, it is recommended to use UNC pathing, rather than a drive letter for the path to the Drop Box. The reason for this is if the drive letter were to change or differ depending on the device where it has been set, this can cause the Drop Box upload functions to fail.

The Drop Box is commonly set up for the network folder which receives the outputs from an office scanner, but may be configured for any network location which is accessible by the user.

To do this, it is recommended to setup a base Drop Box folder as an application share for example:

```
\\Servername\Dropbox\Name_of_dropbox
```

If you were to have a server named “Office”, you would create a new folder share called “Dropboxes” and within this “Dropboxes” folder, create the required dropboxes, i.e.

```
\\Office\Dropboxes\Invoices
\\Office\Dropboxes\Filing
```

Add a Drop Box with a Profile

1. From the *Administration* tab, click *Drop Boxes*.
2. Click *Add New*.
3. Use the *Browse* button to locate the folder where DocMax will monitor.
4. Select the *with Profile* radio button, then in the drop down list, set the appropriate profile.
5. Click *Save Changes* to save.

If a profile is used to apply document properties, any mandatory fields will be ignored and the document will be removed from the drop box. This ensures that the process runs behind the scenes without any interruption to the user.

Add a Drop Box via Add Document window

1. From the *Administration* tab, click *Drop Boxes*.
2. Click *Add New*.
3. Use the *Browse* button to locate the folder where DocMax will monitor.
4. Select the *via Add Document window* radio button.
5. Click *Save Changes* to save.

If the Drop Box is configured to add to DocMax via Add Document Window, DocMax will display the 'Add Document' window as soon as there are documents detected in the Drop Box folder.

Edit a Drop Box

1. From the *Administration* tab, click *Drop Boxes*.
2. Highlight the drop box to edit, then click*Edit*.
3. Use the *Browse* button to locate the folder where DocMax will monitor.
4. Select the either the *with Profile* and select a profile, or *via Add Document window* radio button.
5. Click *Save Changes* to save.

Delete a Drop Box

1. From the *Administration* tab, click *Drop Boxes*.
2. Highlight the drop box to delete, then click*Delete*.
3. When prompted select *Yes* to delete the selected drop box.

A Drop Box can only be edited by the user the Drop Box belongs to or by Administrators with privileges to edit another user's Drop Box.

DocMax Import

There is a function that allows importing DocMax documents. The import function allows a collection of documents to be copied from a network folder into DocMax, including Document Properties, which are set from a user-defined CSV file. This process can be delicate in its execution, and any errors should be reviewed, as the process must proceed without errors to ensure a successful import.

- Only documents that are supported by DocMax will be added via the import process.
- All files to be imported must be in the same network folder.
- The import.csv file must be in the same folder location.
- Each data field/column must be separated by a ',' (comma) to ensure that the mandatory fields are in the import.txt file.

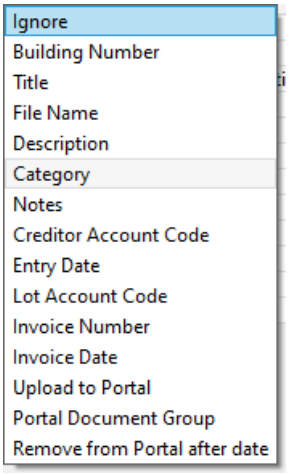
- Merge and Delete Categories if required to ensure that the categories remain consistent.
- Review Online Portal Groups after import and amend if necessary.

Document Import Setup

1. Locate the folder where the import files are saved.
2. Open Excel to create the import.csv file. If the files to be imported were originally exported from DocMax, the index file can be used to create part of the import file.

The following are the mandatory fields, and also the other fields that can be imported:

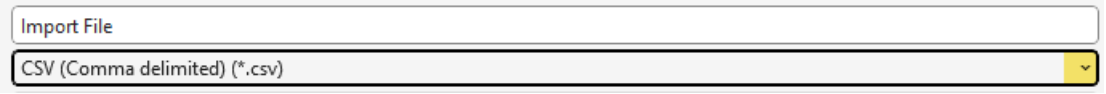
- Building number (mandatory).
- Title (mandatory).
- Filename (name and file extension) (mandatory).



Sample File

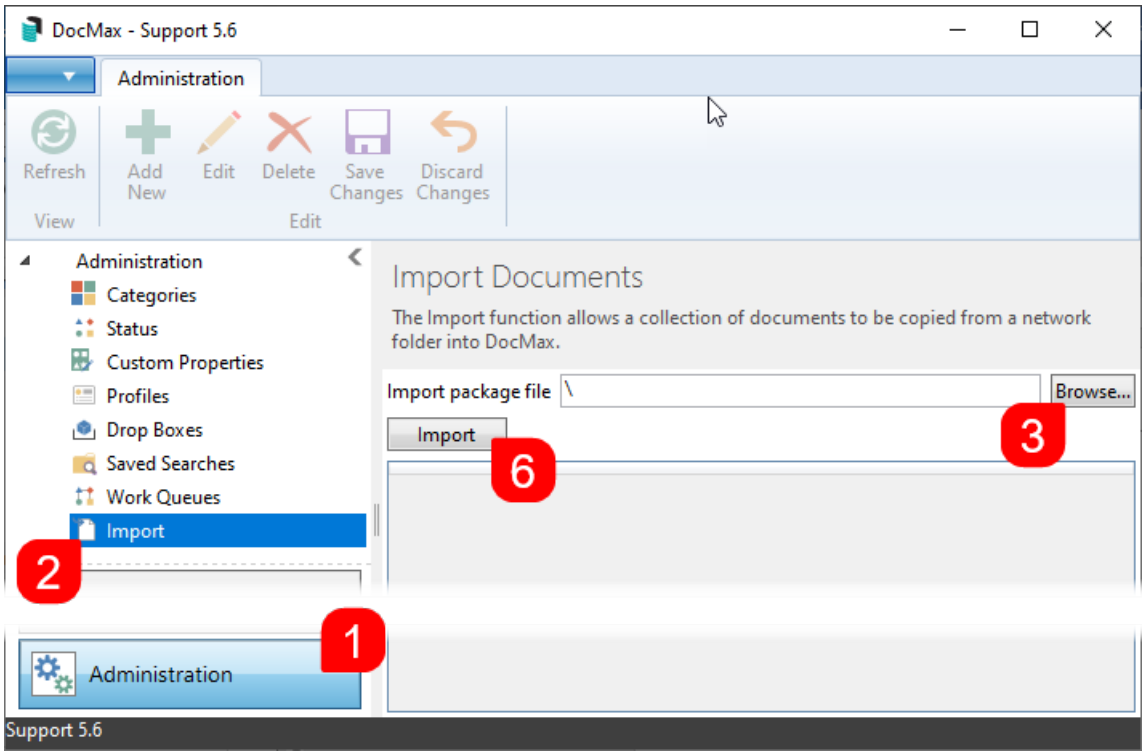
	A	B	C	D	E	F
1	32155	Property Guys	Invoice 15.tif	June Invoice	Invoices	26/06/2025
2	32155	Garden Concepts	Invoice 1.tiff	May Invoice	Invoices	26/06/2025
3	32155	Shire Council	Invoice 2 NSW.tiff	Fees	Invoices	26/06/2025
4	32155	Poolman	Invoice 3.tiff	Chemicals / Clean	Invoices	26/06/2025
5	32155	Gardening 123	Invoice 4.tiff	Fortnighlty Invoice	Invoices	26/06/2025
6	32155	GCCC	Invoice 5.tiff	Rates	Invoices	26/06/2025
7	32155	Purify Water	Invoice 6.tiff	Delivery	Invoices	26/06/2025
8	32155	Qld Govt	Invoice 7.tiff	Fees	Invoices	26/06/2025
9	32155	City Council	Invoice 8.tiff	Rates - Water	Invoices	26/06/2025
10	32155	Craft Pty Ltd	Invoice 9.tiff	Supplies	Invoices	26/06/2025
11	32155	BRK	Invoice 10.tiff	Services	Invoices	26/06/2025
12	32155	Plumber, Drainer & Gasfitter	Invoice 11.tiff	Plumbing - pool	Invoices	26/06/2025

If using Excel, save the file as a *.csv format in the same directory as the documents.

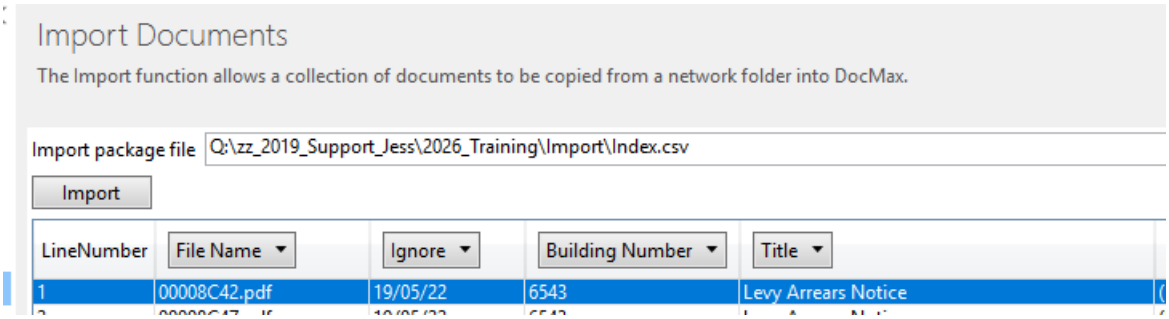


Document Import Process

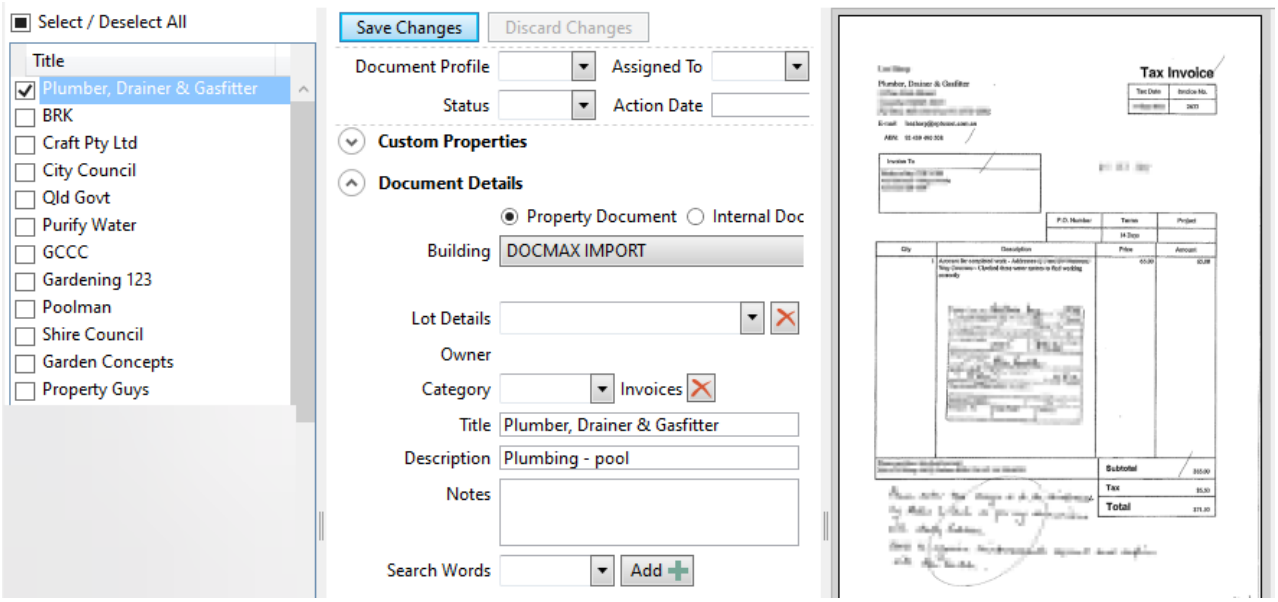
1. In DocMax, select the *Administration* tab.
2. Click the *Import* menu in the left-side navigation pane.
3. Click the *Browse...* button on the right side.
4. Locate the folder where the Import.csv file and documents are saved.
5. Select the file, then *Open.* Check that the column name matches the data below, and amend if necessary. Choose *Ignore* if not required for import.
6. Click the *Import* button once the column headers match the data (see below if any errors are found in the import.csv file).



7. Review the imported files to verify the import has been successful.



Review



DocMax Import Errors

If there are errors within the import.csv file, you may need to review the file and amend it. The import process will not run until all errors are rectified.

Error	Explanation
Error	Meaning
Building number is required	Building Number is not selected as a column heading
Title is required	The Title is not selected as the column heading
FileName is required	The FileName is not selected as a column heading
Invalid building number(s)	The Building Number specified is not found in DocMax
Missing title on these lines	A row is missing a value in the Title column
Invalid file formats	A non-supported file type was found in the FileName column
File not found	The File specified in import.txt is not in the directory