

# DocMax | Bulk Update Documents

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This article covers how to update multiple documents in DocMax, which leverages the *Advanced Search* function in DocMax. This function is useful for scenarios such as after a building transfer and some documents within a category need to be split out into separate categories or when you wish to add documents onto the owners portal in bulk.

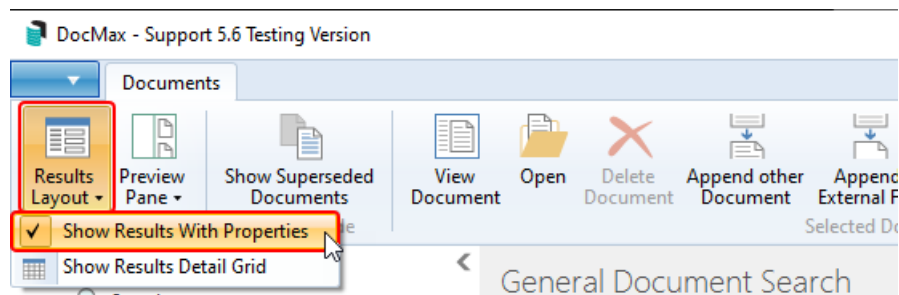
We also offer a completely free 'DocMax Basics' online course, which you can enrol in [here!](#)

## Locate the Documents

The first step is to narrow down which documents you want to update. To do this we recommend setting up an *Advanced Search*, or using an existing *Saved Search* (depending on if you have one), which you can read about here: [DocMax | Advanced Search and Saved Searches](#).

## Update the Fields

1. In order to select multiple or all documents, you will first need to change the *Results Layout* to *Show Results With Properties*.



2. Use the Restrict To options to limit the results to what is required and click Search. To avoid including Lost Buildings add 'Building is Lost' is equal to 'No'.

## Advanced Search

Customised search with specific criteria. The results can be displayed in your preferred layout.

Restrict To	+	Field	Condition	Value
Columns	-	Categories	is any of	Meeting Minutes <input type="button" value="X"/>
Sort Order	-	Title	contains	Committee

3. The list of documents will then have tick boxes next to them, which you can tick individually, or use the *Select / Deselect All* box to select the documents.

Search

Select / Deselect All

Title

- Committee Meeting Minutes 1/02/2023
- Committee Meeting Minutes 12/12/2022
- Committee Meeting Minutes 15/01/2023
- Committee Meeting Minutes 15/02/2023
- Committee Meeting Minutes 15/12/2022
- Committee Meeting Minutes 31/03/2023

Save Changes Discard Changes

Status  Assigned To

Action Date

**Document Details**

Category  Meeting Minutes

Search Words  Add

**Online Portal**

Upload to Portal?

Document Group

Remove from Portal after Date

**File Details**

Document Expires  03/04/2030

4. The following fields can then be updated:

- Status
- Assigned To
- Action Date
- Category
- Search Words
- Online Portal
- Document Expires