

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.

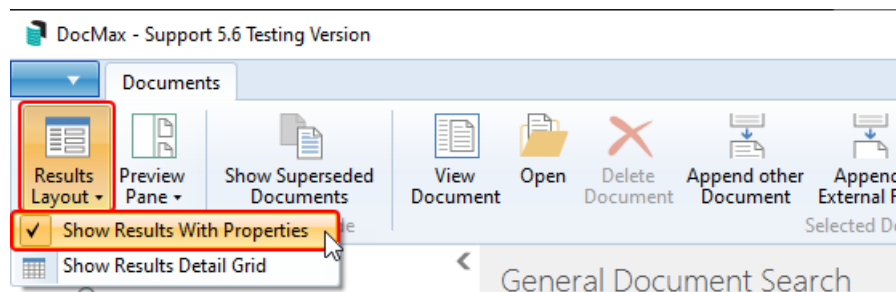
We also offer a completely free 'DocMax Basics' online course, which you can enrol in [here!](#) Please see the [StrataMax Online Courses](#) page for more details, including the coupon code required to enrol for free.

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="text"/>
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.

The screenshot shows a document management interface. At the top, there is a search bar and a status indicator '6 records displayed'. Below this is a list of documents with a 'Select / Deselect All' checkbox highlighted in red. The list contains six entries, each with a checked checkbox and a 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', and 'Committee Meeting Minutes 31/03/2023'. To the right of the list is a details panel with sections for 'Document Details', 'Online Portal', and 'File Details'. The 'Document Details' section includes fields for 'Status', 'Assigned To', 'Action Date', 'Category' (set to 'Meeting Minutes'), and 'Search Words'. The 'Online Portal' section has a checkbox for 'Upload to Portal?' and a 'Document Group' dropdown. The 'File Details' section has a 'Document Expires' dropdown set to '03/04/2030'. Buttons for 'Save Changes' and 'Discard Changes' are located at the top of the details panel.

4. The following fields can then be updated:

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