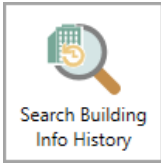


Search Building Info History

Last Modified on 08/08/2024 1:30 pm AEST



The instructions in this article relate to **Search Building Info History**. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

Search Building Info History can be used to find changes made to information recorded in **Building Information**, for example, if an Account Manager was changed, or when a field has been updated. Each column can be clicked on to adjust the sort order and the information can be exported to Excel and used to analyse changed data.

Search Building Info History | Security

To access the **Search Building Info History**, the user must have permission set to 'Allow' for *Search Building Information History* under the 'Menus' category in **Security Setup**.

Search Building Info History

Search Building Info History will display a table of all the changes made in **Building Information** in your StrataMax portfolio, including all edits and updates to fields. Each column can be clicked on to adjust the sort order and the information. This information can also be exported into an Excel sheet if required and filters can be applied. To view or report on changes made in **Building Information**:

1. Search or select **Search Building Info History**.
2. Referring to the restriction fields, the *Current Building* will be a default of restriction. Click the - to remove the Current Building and report across the full portfolio.
3. Refer to the *Advanced* area and apply any Columns and Sort Order preferences.
4. Click *Refresh* to view the results.
5. Click *Export* if this information should be available in Excel.

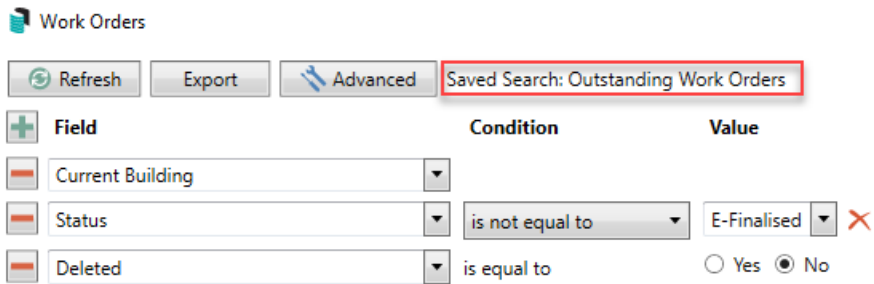
Search Building Info History | Saved Searches

'Saved Searches' are designed for convenience so that you can save a selection of fields, columns, and a specific sort order so that it can be loaded later.

'Saved Searches' can also be set as the 'default' search for the selected screen. This means that the selection of fields, columns, and specific sort order will be the one chosen whenever the menu screen/icon is selected.

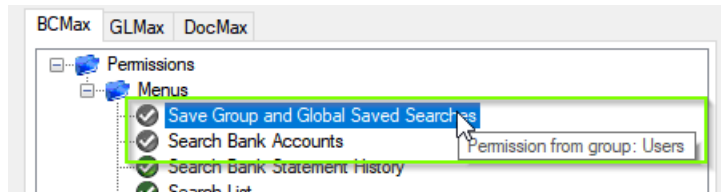
'Saved Searches' can be saved for the current user, globally (accessible to all users), or for a specific user group.

If a Saved Search is loaded/opened this will be noted at the top of the search screen.

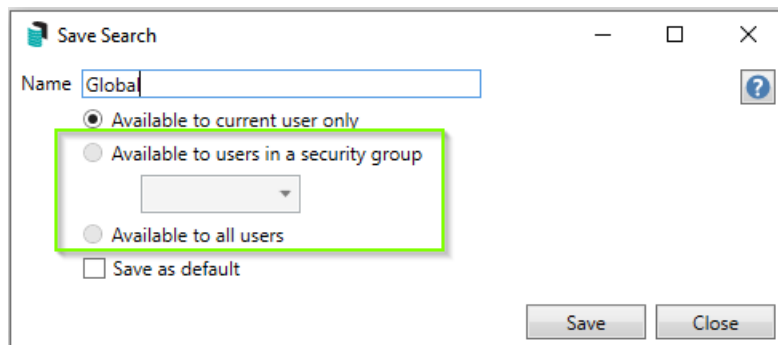


Saved Searches | Security Setup Permissions

A security permission will either allow or deny individual *Users* or *User Groups* access to create or delete a search. The permission is called 'Save Group and Saved Searches' under the 'Menus' category in **Security Setup**. You can also type the word 'Search' into the filter field and click the *Filter* button to see the permission.



If the *User* or *User Group* do not have the permission set to 'Allow' then the ability to save a search for all users or a user group will be inactive.



Saved Searches | Set up a new Saved Search

1. Configure the required fields and click the *Refresh* button to display the required data.

- Optionally click the *Advance* button to also configure the displayed columns, and specific sort order.
2. Click the *Refresh* button to display the data.
 3. Click the *Save Search As* button, and the 'Save Search' window will appear.
 4. Enter a 'Name'.
 5. Select one of the three radio buttons, depending on your requirement:
 - *Available to current user only* will save the search for the current user only.
 - *Available to users in security group* will save the search for the *User Group* selected from the drop-down (this radio button is only available if you have the right permission, and the *User Groups* available in this list are limited to the *User Groups* that you are a member of).
 - *Available to all users* will save the search for all StrataMax users (this radio button is only available if you have the right permission).
 6. Optionally tick the *Save as default* box to load this 'Saved Search' whenever the menu screen/icon is opened.

Saved Searches | Load or Delete a Saved Search

1. At the bottom of the screen, click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button to load the *Saved Search*, or click the red cross button to delete the *Saved Search*.
3. If you click the *Load* button, the 'Load Search' window will disappear, and the screen will refresh automatically and load the *Saved Search* data.
4. If you click the *Delete* button, a confirmation pop-up will appear; Click *Yes* to confirm the deletion.

When a Saved Search is loaded/opened, the Saved Search name will be noted at the top of the search screen.

Saved Searches | Edit a Saved Search

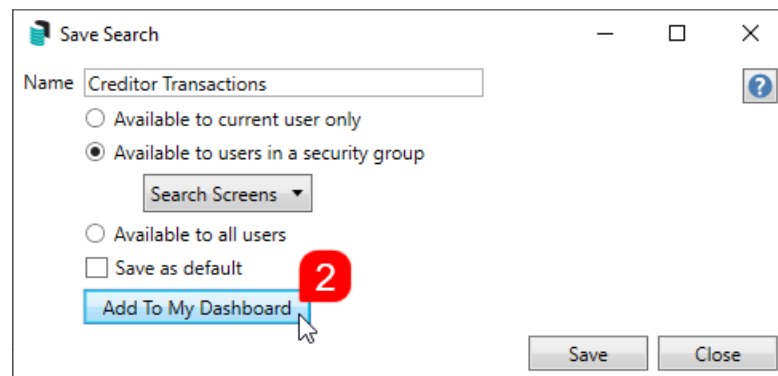
1. If the *Saved Search* you want to edit has been set as the default search, it should be on screen already, and you can proceed to the next step. Otherwise click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button.
3. Now make any changes required to the required fields, and optionally click the *Advance* button to also configure the displayed columns, and specific sort order.
4. Click the *Refresh* button to display and check the data.
5. Click the *Save Search* button to save the applied changes.

Saved Searches | Add To My Dashboard

There is the option to add certain searches to your own **Dashboard**. This is limited to your own **Dashboard** only (you cannot add it to the **Dashboard** of another user or group), and only available in these specific 'Search' screens:

- [Search Office Bearers](#)
- [Search Bank Accounts](#)
- [Search Creditor Invoice Items](#)
- [Search Work Orders](#)
- [Search Quotes](#)
- [Search Building](#)
- [Search Inspections](#)
- [Search Levies](#)
- [Management Fees Report](#)

1. Follow the steps to set up a new Saved Search, or edit a Saved Search (see the two relevant sections above).
2. In the 'Save Search' window, click the *Add To My Dashboard* button.



3. The 'Dashboard Configuration' window will then appear.
4. The *Report* drop-down menu cannot be changed from 'Saved Search'.
5. The *Display Title* can be changed to whatever is required.
6. Choose the *Display Type* that is preferred. See [Display Types](#) for more information.
7. Tick *Show On Desktop* if preferred.
8. Depending on which *Display Type* was chosen, the fields for the different number values will change. Observe the *Preview* to assist with picking the right number values suited to the *Display Type*.
9. Click the *Save* button.
10. Back in the 'Save Search' screen, there are now buttons to *Edit Dashboard* and *Delete Dashboard*.
11. Click the *Close* buttons on any remaining screens.

Examples of Searches for Dashboard

The below are some examples of saved searches that can be used as a dashboard to either prompt based on particular dates or to provide quick access to information & reporting. Examples are reliant on fields being populated with data and information as part of your processes and your particular setup of Restrict To, Display Columns and Sort Order may vary to suit your requirements.

Last AGM where minutes have not been sent (Search Buildings)

Restrict To:

| Field | Condition | Value |
|-------------------------------|-----------------|---|
| Building Name | starts with | |
| AGM Last Meeting Date/Time | is on or before | <input type="checkbox"/> Specific Dates 2 weeks in the past |
| AGM Last Meeting Minutes Sent | is empty | |

Displayed Columns:

Displayed Columns

- Building Number
- Building Name
- Account Manager
- AGM Last Meeting Date/Time
- AGM Last Meeting Minutes Sent

Assigned Team Members (Search Buildings)

Restrict To: No requirements however you may filter by Account Manager for example

Displayed Columns:

Displayed Columns

- Building Number
- Building Name
- Account Manager
- Account Manager Assistant Name
- Strata Finance Manager Name
- Asset Manager Name

Term Deposits maturing in next 30 days where no instruction has been provided (Search Bank Accounts)

Restrict To:

| Field | Condition | Value |
|------------------------|------------------------|--------------------|
| Building Number | is equal to | |
| Status | is not equal to | Removed |
| Account Code | is not equal to | 012 - CASH AT BANK |
| TD Maturity Date | is in the next 30 days | |
| TD Renewal Instruction | is empty | |

Displayed Columns:

- Displayed Columns**
- Bank
 - Account Number
 - Building Number
 - Building Name
 - Account Manager
 - Bank Account Name
 - TD Maturity Date
 - TD Interest Rate
 - TD Start Date
 - TD Renewal Instruction

Creditor Invoices on hold & dated more than 1 month in the past (Search Creditor Invoice Items)

Restrict To:

| Field | Condition | Value |
|---------------------------------------|----------------|---|
| <input type="checkbox"/> Invoice Date | is on or after | <input type="checkbox"/> Specific Dates 1 Month in the past |
| <input type="checkbox"/> On Hold | is equal to | <input checked="" type="radio"/> Yes <input type="radio"/> No |

Displayed Columns:

- Displayed Columns**
- Reference
 - Invoice Date
 - Invoice Amount
 - Invoice Number
 - Creditor Code
 - Creditor Name
 - Expense Code
 - Expense Name
 - Details
 - Paid Date
 - Paid
 - On Hold

Inspections due in next 30 days (Search Inspections)

Restrict To: setting the category to specific values allows dashboards specific to inspection types.

| Field | Condition | Value |
|-----------------------------------|------------------------|--|
| <input type="checkbox"/> Category | is equal to | Sinking Fund Forecast ✗ |
| <input type="checkbox"/> Next Due | is in the next 30 days | |

Displayed Columns:

Displayed Columns

- Building Number
- Building Name
- Category
- Period
- Next Due
- Last Due
- Inspected By Code
- Inspected By Name
- Result
- Result Rating

Identify Creditors with no Compliance Code that have had recent activity

Restrict To:

| | Field | Condition | Value |
|--|-----------------------|-----------------------|-------|
| | Compliance Short Name | is empty | |
| | Last Activity | is in the last 7 days | |

Displayed Columns:

Displayed Columns

- Building Name
- Building Number
- Creditor Code
- Creditor Name
- Balance
- On Hold Total
- Compliance Short Name
- Compliance Long Name