Search Buildings

Last Modified on 08/08/2024 1:31 pm AEST

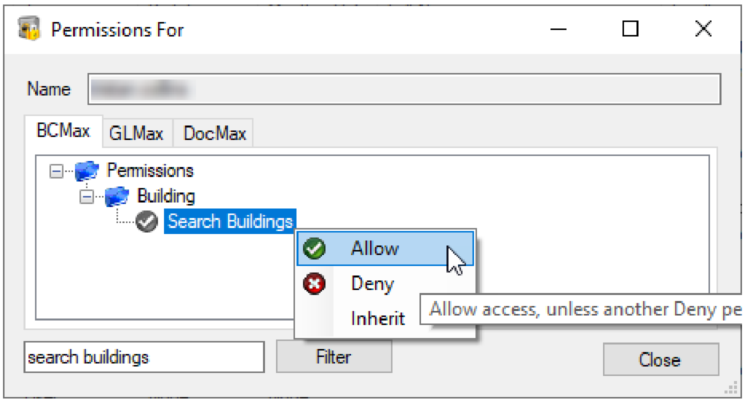
The instructions in this article relate to ***Search Buildings.*** The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

The ***Search Buildings*** screen has been designed for users to search specific fields in ***Building Information*** across all buildings in a portfolio, that can then optionally be exported to Excel.

It is recommended to use ***Search Buildings*** for all global reporting of ***Building Information*** fields that *Group Reports* and *Custom Reports* may have previously been used for.

Search Buildings | Security

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



Search Buildings

Using the 'Restrict To' fields, ***Building Information*** data can be limited to what needs to be displayed, whether it is based on 'Building Name,' 'Account Manager', 'Legislation' and more. Clicking the *Advanced* button displays more tabs so that columns can be included or excluded, setting of the sort order, and limiting the maximum number of records to report.

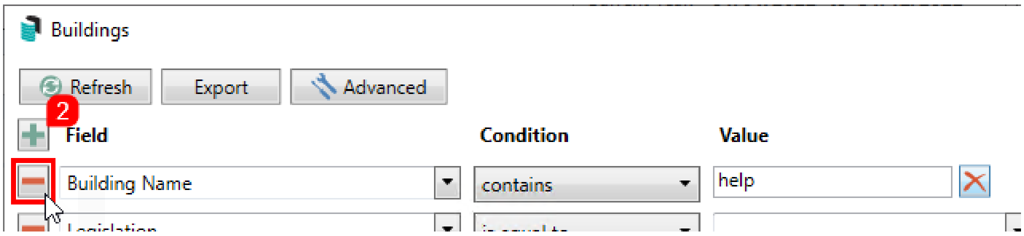
The results can also be saved for a *Saved Search*, which will allow this to be used at a later time and can be made available for a single *User* or *Group*.

To select multiple fields in the 'Columns' display area, click the first field, hold the keyboard Crtl key, and select the following field. This will select both fields and allow these to be moved up or down simultaneously.

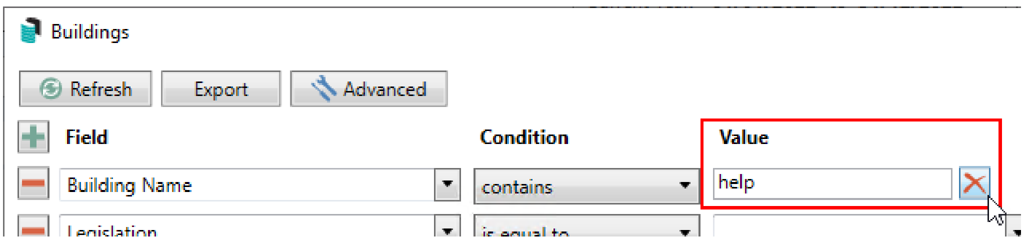
Setting Up Filters

Using filters, the results of the report can be based on specific requirements. To set up the reporting requirements follow the below steps:

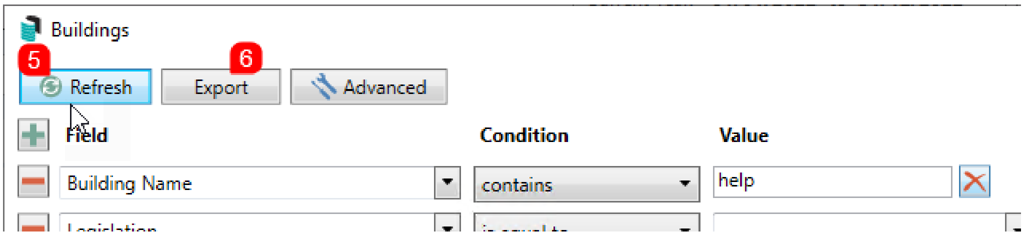
1. Search or select ***Search Buildings***.
    - By default, the 'Building Name' and 'Legislation' **Fields** are selected.
2. Select the green *plus* button to add more **Fields,** then click the drop-down menu to choose the required **Field** (from ***Building Information***).
    - If a **Field** needs to be removed, click the red *minus* button next to the field.



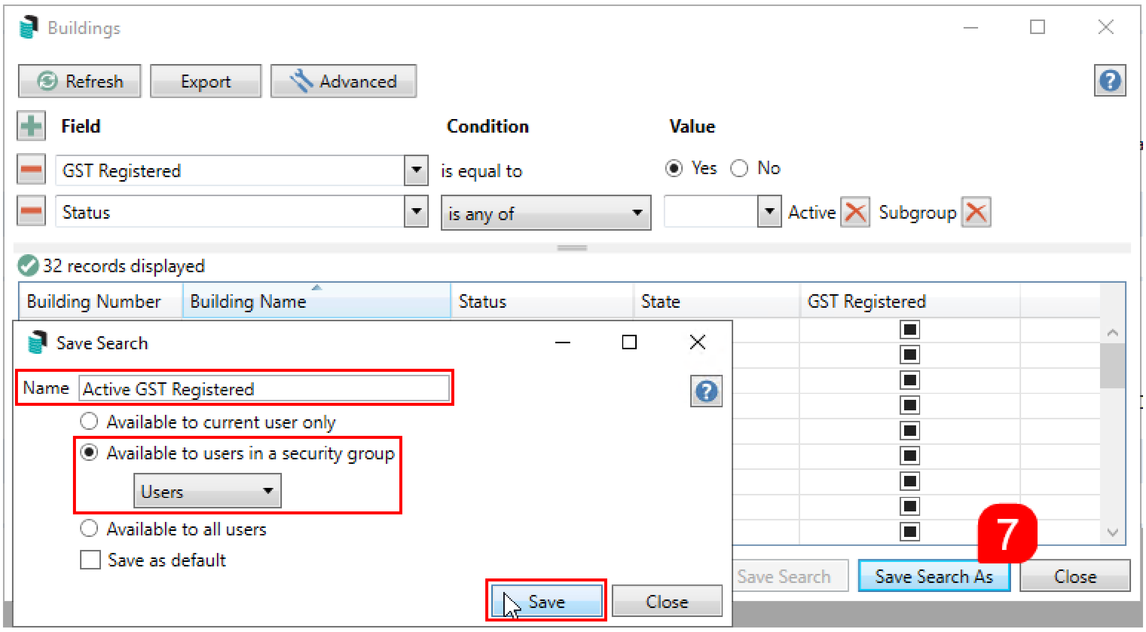
3. Depending on the selected **Field,** the **Condition** may or may not be changed to suit your needs ('Is equal to,' 'contains,' 'is in the range,' etc.)
4. Select the required **Value -** selected by radio button, chosen from a drop-down menu with data options, date ranges or specific dates, or typed manually.
    - If the **Value** can be either typed or selected from a drop-down menu, you can clear the selection by clicking the red cross icon next to the **Value**.



5. Click the *Refresh* button to load the results.
    - Click a column header to sort the data by that column.
6. Click the *Export* button if the data needs to be exported to Excel where it can be freely modified or printed as a report, etc.



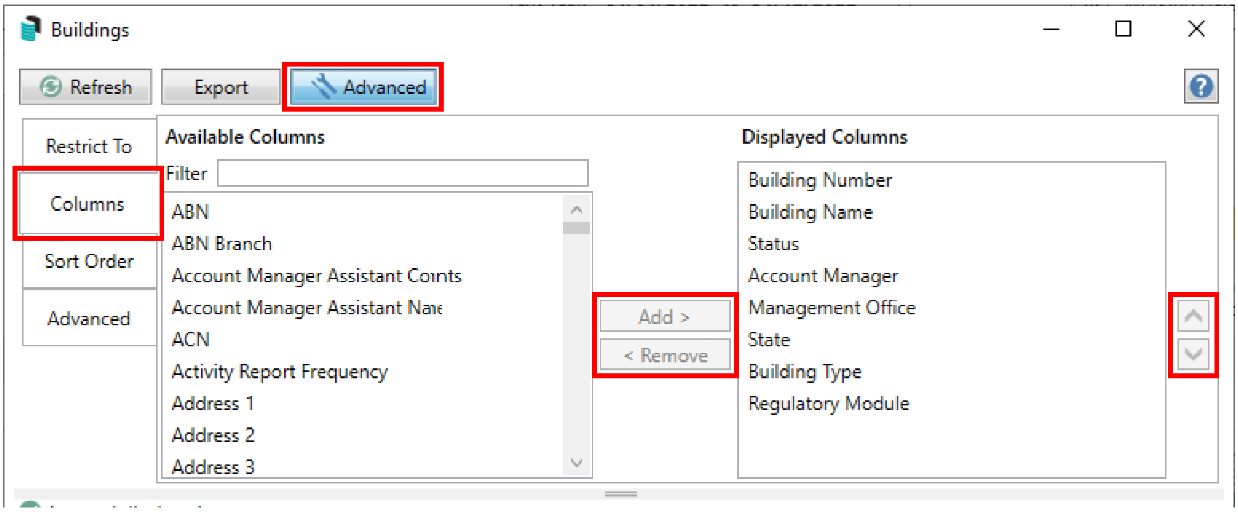
7. Optionally, the results can be saved as a 'Saved Search' for convenience, so that it can be loaded at a later time.
    - Click *Save Search As*.
    - Type in the *Name*.
    - Select the User/s or Group that it's available for.
    - Tick the *Save as default* box <u>if</u> this is the data to be displayed each time the User/s or Group open the ***Building Search*** screen.
    - Click the *Save* button.



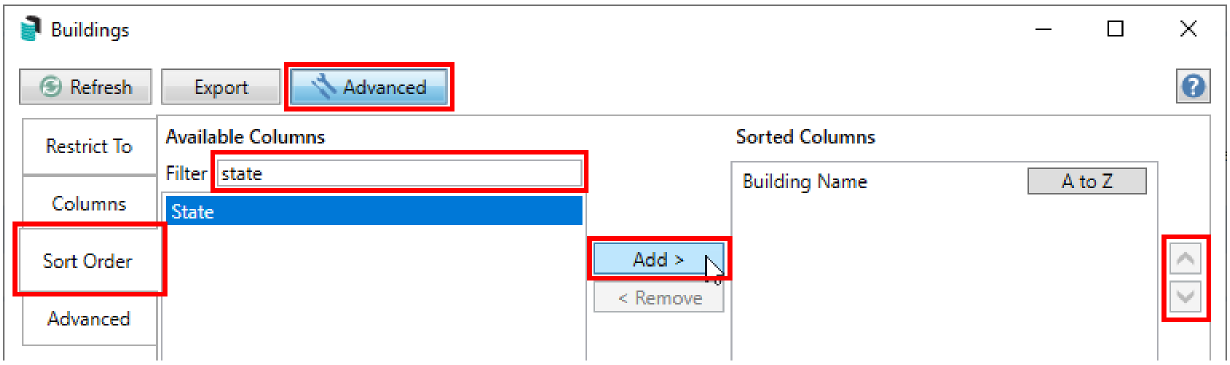
Each column can be clicked on to adjust the sort order.

Setting Display Columns & Sort Order

The displayed columns can be changed by clicking the *Advanced* button, then selecting the *Columns* tab. Select the required column (use the *Filter* to search for the required column) and use the *Add* or *Remove* buttons. In the displayed columns section use the *Up* and *Down* arrows to move the required columns.



The sort order can be changed by clicking the *Advanced* button, then selecting the *Sort Order* tab. In the **Available Columns** list, select the required column (use the *Filter* to search for the required column), and click the *Add* button to add the column. In the **Sorted Columns** list, use *Remove* button to remove a column and the *Up* and *Down* arrows to move the required columns up or down the list.



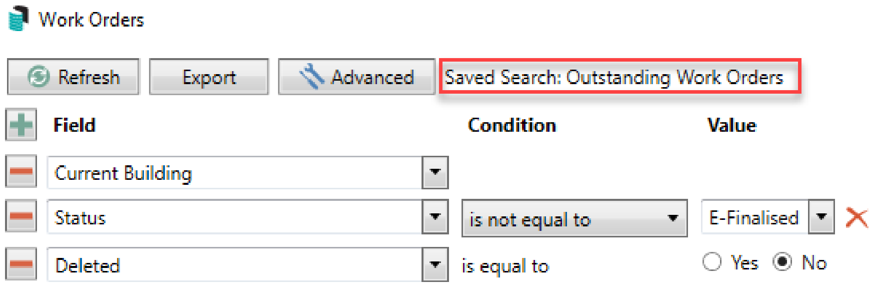
Search Buildings | Saved Searches

'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.

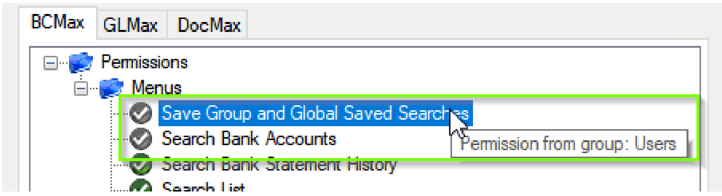
'Saved Searches' can be saved for the current user, globally (accessible to all users), or for a specific user group.

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

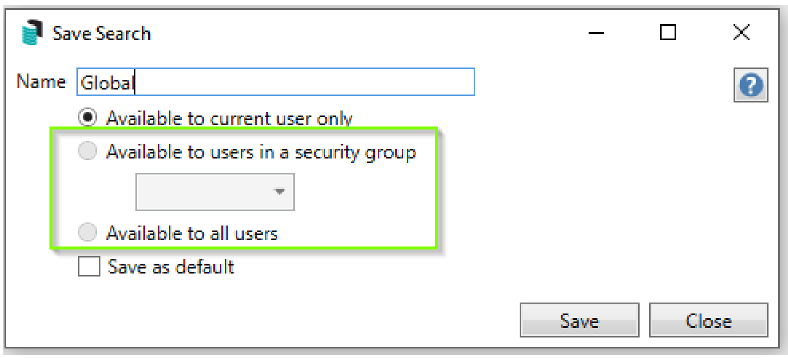


Saved Searches | Security Setup Permissions

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.

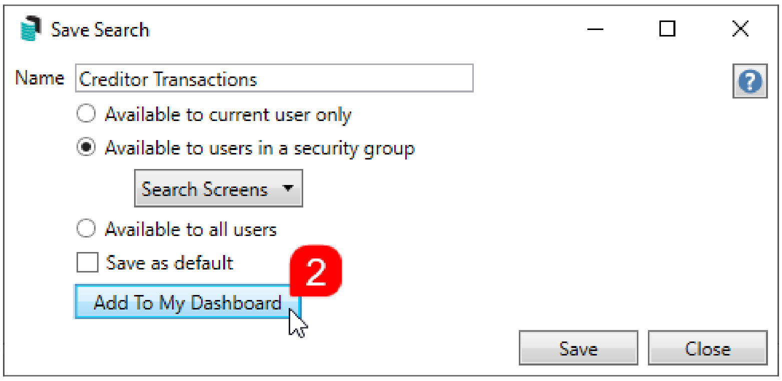
Saved Searches | Add To My Dashboard

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	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:

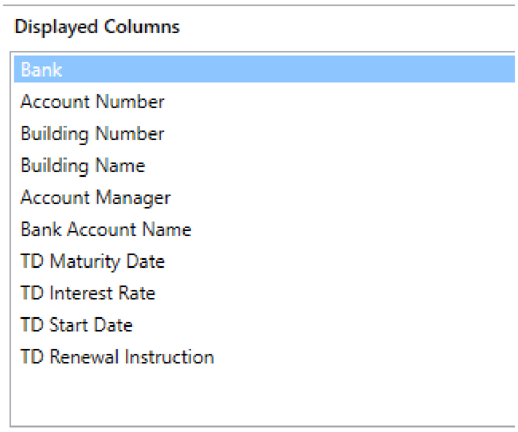
Displayed Columns
Building Number
Building Name
Account Manager
Account Manager Assistant Name
Strata Finance Manager Name
Asset Manager Name

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

Restrict To:

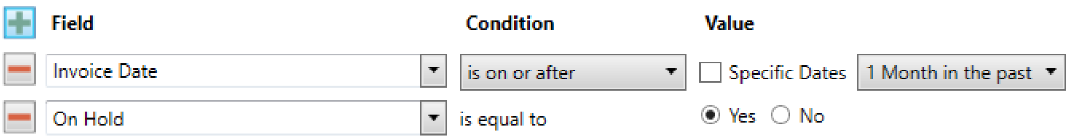
Field	Condition	Value
Building Number	is equal to	
Status	is not equal to	Removed
Account Code	is not equal to	012 - CASH AT BANK
TD Maturity Date	is in the next 30 days	
TD Renewal Instruction	is empty	

Displayed Columns:

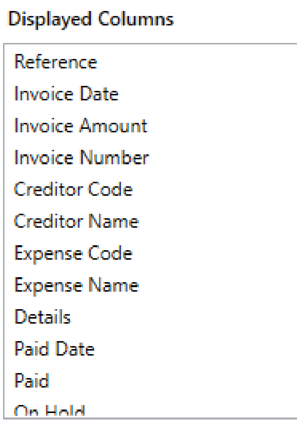


Creditor Invoices on hold & dated more than 1 month in the past (Search Creditor Invoice Items)

Restrict To:

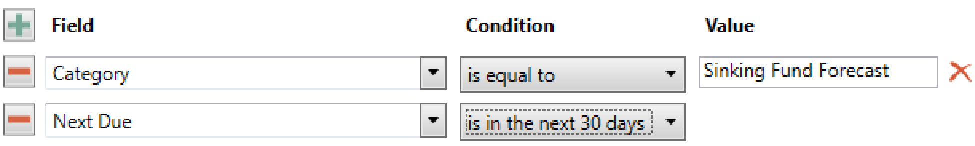


Displayed Columns:



Inspections due in next 30 days (Search Inspections)

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



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