Search Inspections

Last Modified on 15/01/2026 2:20 pm AEST

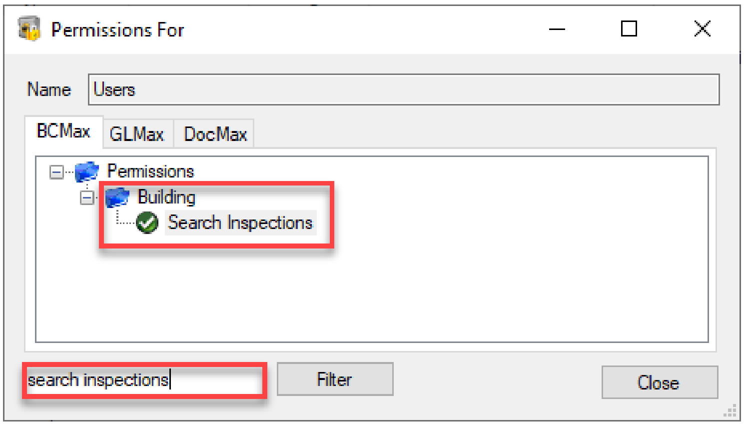
The instructions in this article relate to ***Search Inspections.*** The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

Search Inspections can be used to search data recorded in the ***Inspections*** register, across your portfolio, to quickly identify and report items such as upcoming or overdue inspection due dates. Searches can be saved for continuous use, which can then be optionally exported to Excel or produced into a PDF-style document.

It is recommended to use ***Search Inspections*** for all global reporting of the ***Inspections Register*** that *Group Reports* and *Custom Reports* may have previously been used for. Also note that only current year data will be displayed in the search results.

Search Inspections | Security

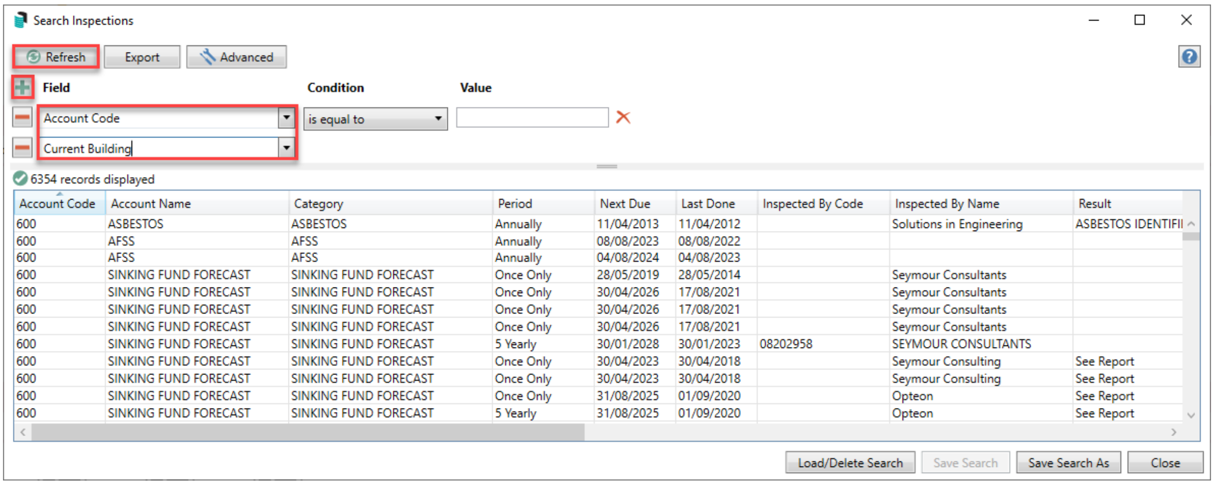
To access ***Search Inspections*** screen, the user must have the permission set to 'Allow' for 'Search Inspections' under the 'Building' category in ***Security Setup.***



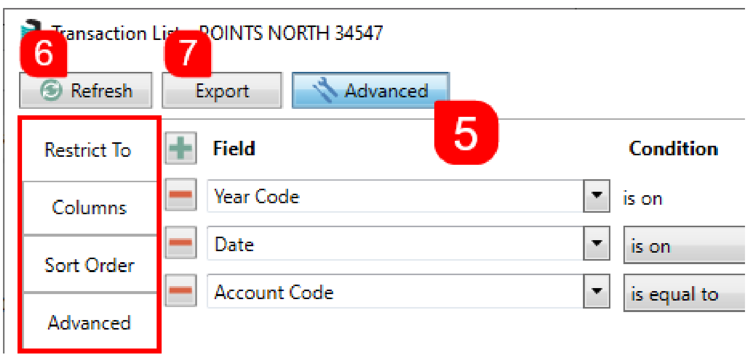
Search Inspections

Search Inspections has been designed for users to search any records in the ***Inspection Register*** that have been created based on set values; results can be exported to Excel. Quickly identify and report items such as upcoming or overdue inspection dates.

1. Search or select ***Search Inspections.***
2. By default, the fields 'Current Building' and 'Account Code' will be applied.
    - By removing (click the red 'minus' button) or changing the 'Current Building' field to a different field, it will display inspection items across your entire portfolio.
    - The 'Account Code' field is used to select a specific Inspection Account Code (600 range). By removing (click the red 'minus' button) or changing the 'Account Code' field to a different field, it will display the full history of all inspection types and category e.g. Report on the Category.
3. To add another field, click the green plus button, then select the **Field** by clicking the drop-down menu.



4. Based on the selected **Field,** the **Condition** can be changed if required, and then you can change / select the required **Value**.
5. Click the *Advanced* button to display additional tabs down the left side:
    - *Columns* to add, remove, or change the order of the columns.
    - *Sort Order* to change how the data in the table is sorted (by column, A-Z, etc.).
    - *Advanced* to change the maximum number of records to display in the table (10000, 1000, etc.).
6. Click the *Refresh* button to search for the records.
7. If you would like to, you can export the data to an Excel sheet, by clicking the *Export* button.



Each column can be clicked on to adjust the sort order

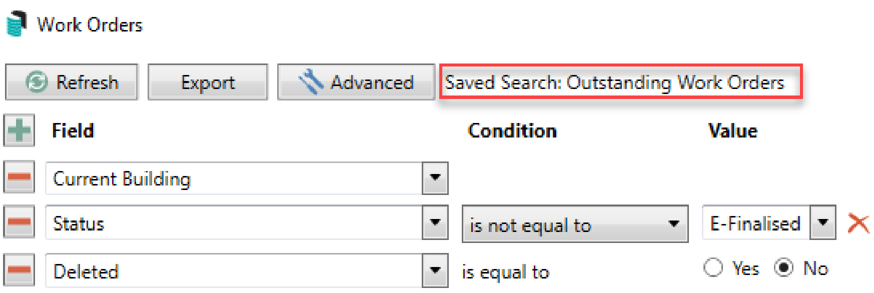
Search Inspections | Saved Searches

'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. There is also a tool to assist with quick-finding fields of text information. Use the top right corner and enter text into this field to search. Click *Find First* or *Find Next* to locate results.

'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.

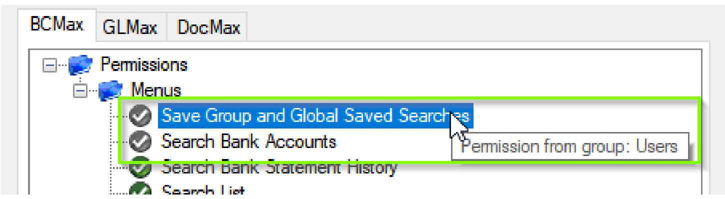
'Saved Searches' can be saved for the current user, globally (accessible to all users), or for a specific user group.

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

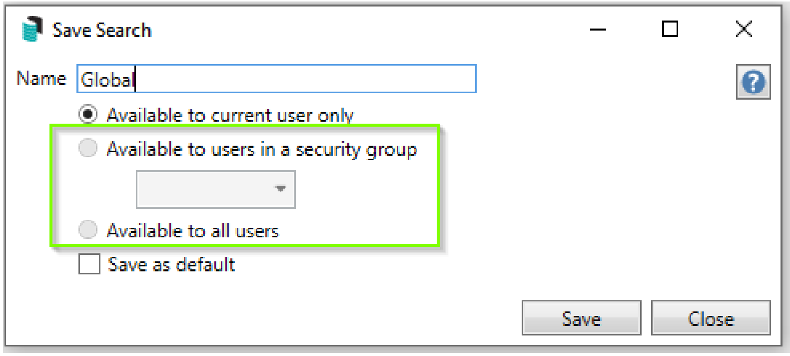


Saved Searches | Security Setup Permissions

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

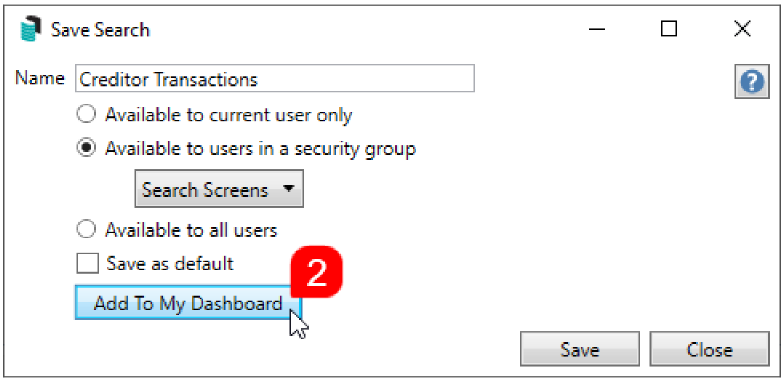
1. If the *Saved Search* you want to edit has been set as the default search, it should be on screen already, and you can proceed to the next step. Otherwise click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button.
3. Now make any changes required to the required 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.

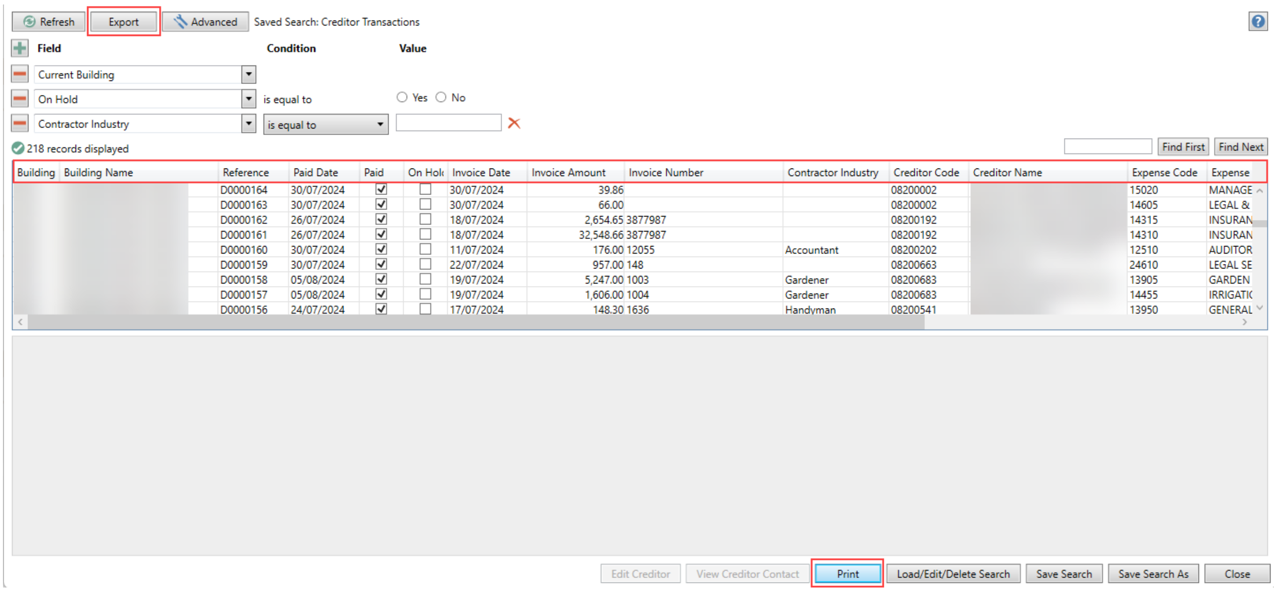


3. The 'Dashboard Configuration' window will then appear.
4. The *Report* drop-down menu cannot be changed from 'Saved Search'.
5. The *Display Title* can be changed to whatever is required.
6. Choose the *Display Type* that is preferred. See *Display Types* for more information.
7. Tick *Show On Desktop* 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.

Export and Print

Each search can be exported to Excel or produced as a PDF-style report, and the column display for these reports will be included.

- *Export* - If there are more than 1000 results, Check the *Advanced* tab / Advanced area to report the maximum. Click Export for an Excel report.
- *Print* - Check the cogwheel from the Report Distribution screen to change fonts and set the letterhead style. This print style will produce the report based on the column width. Click Print for a PDF-style report.

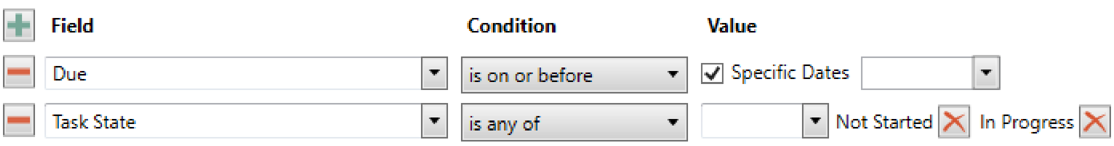


Examples of Searches for Dashboard

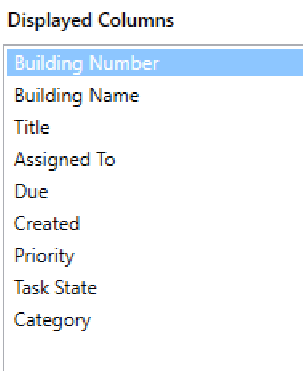
The below are some examples of saved searches that can be used as a dashboard to either prompt based on particular dates or to provide quick access to information & reporting. Examples are reliant on fields being populated with data and information as part of your processes, and your particular setup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

All Overdue Tasks (Search Tasks)

Restrict To:



Displayed Columns:



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:

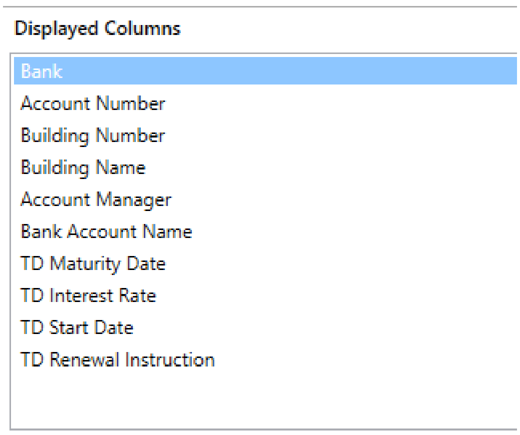
Displayed Columns
Building Number
Building Name
Account Manager
Account Manager Assistant Name
Strata Finance Manager Name
Asset Manager Name

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

Restrict To:

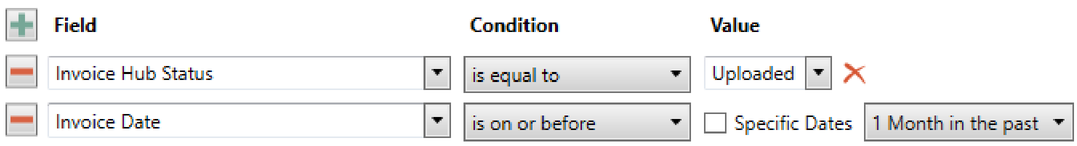
Field	Condition	Value
Building Number	is equal to	
Status	is not equal to	Removed
Account Code	is not equal to	012 - CASH AT BANK
TD Maturity Date	is in the next 30 days	
TD Renewal Instruction	is empty	

Displayed Columns:

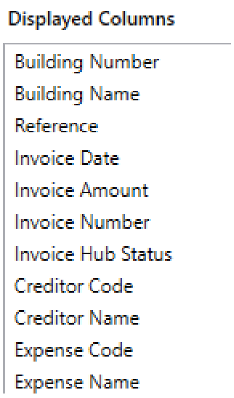


Creditor Invoices Awaiting Invoice Hub Approval & dated more than 1 month in the past (Search Creditor Invoice Items)

Restrict To:

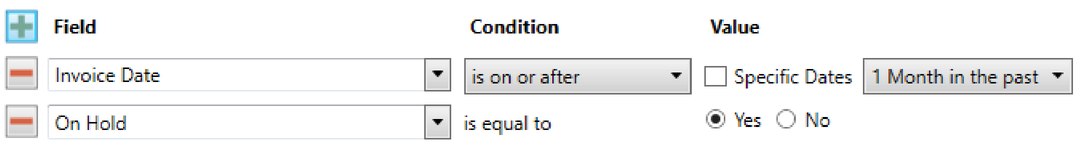


Displayed Columns:



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

Restrict To:



Displayed Columns:

Displayed Columns

- Building Number
- Building Name
- Reference
- Invoice Date
- Invoice Amount
- Invoice Number
- On Hold
- Invoice Hub Status
- Creditor Code
- Creditor Name
- Expense Code

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
Category	is equal to	Sinking Fund Forecast
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 expense account codes without a category (Search Global Accounts)

Useful for ensuring the NSW State of Key Financial Information is accurate; this relies on account codes having a category set in Account Maintenance.

Restrict To:

Field	Condition	Value
Account Type	is equal to	Expense
Financial Reporting Category	is empty	
Actual YTD	is not equal to	0
Actual YTD	is not empty	

Displayed Columns:

Displayed Columns

Building Number
Building Name
Account Code
Description
Financial Reporting Category