

# Search Inspections

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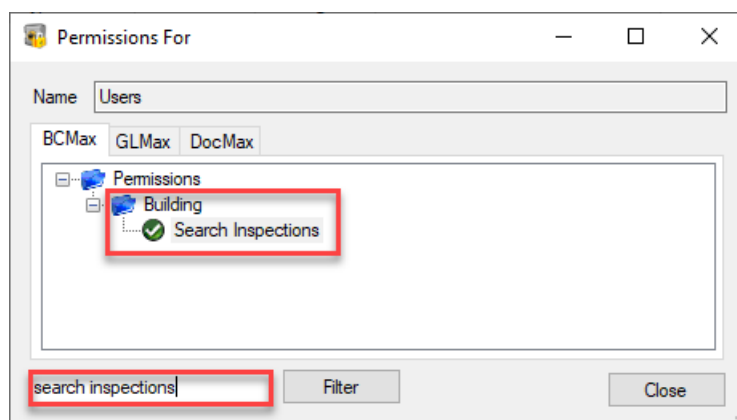
The instructions in this article relate to **Search Inspections**. The icon may be located on your [StrataMax Desktop](#) or found using the [StrataMax Search](#).

**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.

The screenshot shows the 'Search Inspections' window. At the top, there are buttons for 'Refresh', 'Export', and 'Advanced'. Below these is a table for defining search criteria:

Field	Condition	Value
Account Code	is equal to	
Current Building		

Below the criteria table, it says '6354 records displayed'. The main part of the window is a table of inspection records:

Account Code	Account Name	Category	Period	Next Due	Last Done	Inspected By Code	Inspected By Name	Result
600	ASBESTOS	ASBESTOS	Annually	11/04/2013	11/04/2012		Solutions in Engineering	ASBESTOS IDENTIFI
600	AFSS	AFSS	Annually	08/08/2023	08/08/2022			
600	AFSS	AFSS	Annually	04/08/2024	04/08/2023			
600	SINKING FUND FORECAST	SINKING FUND FORECAST	Once Only	28/05/2019	28/05/2014		Seymour Consultants	
600	SINKING FUND FORECAST	SINKING FUND FORECAST	Once Only	30/04/2026	17/08/2021		Seymour Consultants	
600	SINKING FUND FORECAST	SINKING FUND FORECAST	Once Only	30/04/2026	17/08/2021		Seymour Consultants	
600	SINKING FUND FORECAST	SINKING FUND FORECAST	Once Only	30/04/2026	17/08/2021		Seymour Consultants	
600	SINKING FUND FORECAST	SINKING FUND FORECAST	5 Yearly	30/01/2028	30/01/2023	08202958	SEYMOUR CONSULTANTS	
600	SINKING FUND FORECAST	SINKING FUND FORECAST	Once Only	30/04/2023	30/04/2018		Seymour Consulting	See Report
600	SINKING FUND FORECAST	SINKING FUND FORECAST	Once Only	30/04/2023	30/04/2018		Seymour Consulting	See Report
600	SINKING FUND FORECAST	SINKING FUND FORECAST	Once Only	31/08/2025	01/09/2020		Opteon	See Report
600	SINKING FUND FORECAST	SINKING FUND FORECAST	5 Yearly	31/08/2025	01/09/2020		Opteon	See Report

At the bottom right, there are buttons: 'Load/Delete Search', 'Save Search', 'Save Search As', and 'Close'.

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.

The screenshot shows the 'Transaction List' window for 'POINTS NORTH 34547'. It has buttons for 'Refresh', 'Export', and 'Advanced'. A sidebar on the left contains a 'Restrict To' section with four options: 'Columns', 'Sort Order', 'Advanced', and 'Advanced' (repeated). The main area shows a table with search criteria:

Field	Condition
Year Code	is on
Date	is on
Account Code	is equal to

Red numbered callouts are present: 6 points to the 'Refresh' button, 7 points to the 'Export' button, and 5 points to the 'Advanced' button in the sidebar.

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.

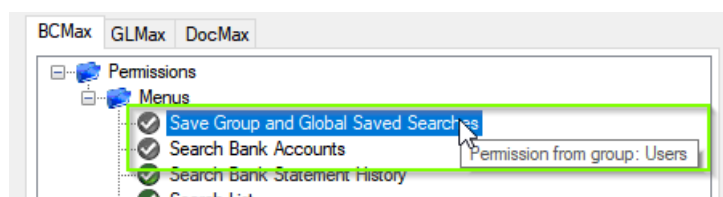
'Saved Searches' can be saved for the current user, globally (accessible to all users), or for a specific user group.

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

Field	Condition	Value
Current Building		
Status	is not equal to	E-Finalised
Deleted	is equal to	Yes

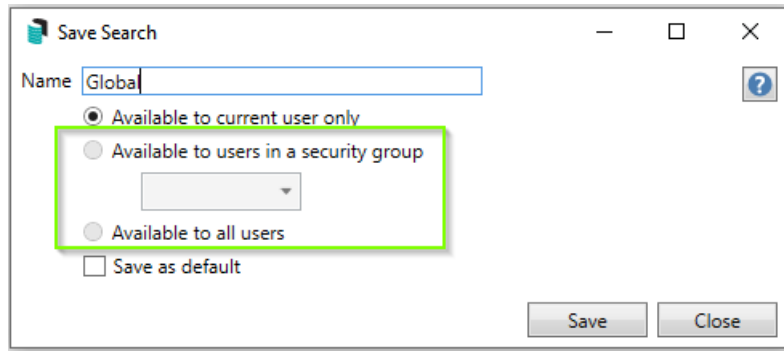
## Saved Searches | Security Setup Permissions

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.



The screenshot shows a 'Save Search' window with the following elements:

- Name:** A text field containing 'Global'.
- Availability Options:** Three radio buttons are present:
  - ☒ Available to current user only
  - ☐ Available to users in a security group (with a dropdown menu below it)
  - ☐ Available to all users
- Save as default:** An unchecked checkbox.
- Buttons:** 'Save' and 'Close' buttons at the bottom right.

## 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

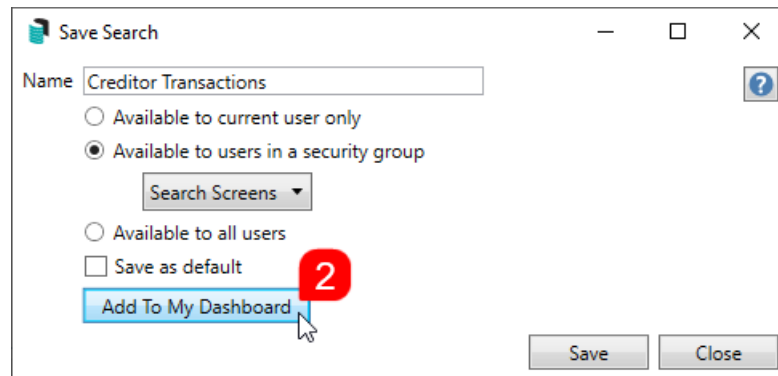
1. If the *Saved Search* you want to edit has been set as the default search, it should be on screen already, and you can proceed to the next step. Otherwise click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button.
3. Now make any changes required to the required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

Refresh

Export

Advanced

Saved Search: Creditor Transactions

?

Field

Condition

Value

Current Building

On Hold

Contractor Industry

is equal to

is equal to

Yes

No

218 records displayed

Find FirstFind Next

Building	Building Name	Reference	Paid Date	Paid	On Hold	Invoice Date	Invoice Amount	Invoice Number	Contractor Industry	Creditor Code	Creditor Name	Expense Code	Expense
		D0000164	30/07/2024	✓	<input type="checkbox"/>	30/07/2024	39.86			08200002		15020	MANAGE
		D0000163	30/07/2024	✓	<input type="checkbox"/>	30/07/2024	66.00			08200002		14605	LEGAL &
		D0000162	26/07/2024	✓	<input type="checkbox"/>	18/07/2024	2,654.65	3877987		08200192		14315	INSURAN
		D0000161	26/07/2024	✓	<input type="checkbox"/>	18/07/2024	32,548.66	3877987		08200192		14310	INSURAN
		D0000160	30/07/2024	✓	<input type="checkbox"/>	11/07/2024	176.00	12055	Accountant	08200202		12510	AUDITOR
		D0000159	30/07/2024	✓	<input type="checkbox"/>	22/07/2024	957.00	148		08200663		24610	LEGAL SE
		D0000158	05/08/2024	✓	<input type="checkbox"/>	19/07/2024	5,247.00	1003	Gardener	08200683		13905	GARDEN
		D0000157	05/08/2024	✓	<input type="checkbox"/>	19/07/2024	1,606.00	1004	Gardener	08200683		14455	IRRIGATI
		D0000156	24/07/2024	✓	<input type="checkbox"/>	17/07/2024	148.30	1636	Handyman	08200541		13950	GENERAL

Edit Creditor

View Creditor Contact

Print

Load/Edit/Delete Search

Save Search

Save Search As

Close

## 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:

Field

Condition

Value

Due

is on or before

☒ Specific Dates

Task State

is any of

Not Started

In Progress

Displayed Columns:

Displayed Columns

Building Number

Building Name

Title

Assigned To

Due

Created





Priority

Task State

Category

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

Restrict To:

 Field	Condition	Value
 Building Name	starts with	<input type="text"/>
 AGM Last Meeting Date/Time	is on or before	<input type="checkbox"/> Specific Dates <input type="text" value="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	<input type="text"/>
 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 Awaiting Invoice Hub Approval & dated more than 1 month in the past (Search Creditor Invoice Items)

Restrict To:



Field	Condition	Value
 Invoice Hub Status	is equal to	Uploaded  
 Invoice Date	is on or before	<input type="checkbox"/> Specific Dates <input checked="" type="checkbox"/> 1 Month in the past

Displayed Columns:

Displayed Columns
Building Number
Building Name
Reference
Invoice Date
Invoice Amount
Invoice Number
Invoice Hub Status
Creditor Code
Creditor Name
Expense Code
Expense Name

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

Restrict To:

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

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