Release Notes – Version 5.6.64

StrataMax has been dedicated to meeting the needs of Strata Managers for over 30 years through the continual enhancement of our software suite. We are committed to providing new functionality to support you in servicing your clients and to provide opportunities for you to optimize efficiency within your office environment.

This document describes exciting new features and enhancements available in the above release.

A history of Release Notes can be reviewed on the StrataMax Online Help

THE COMPLETE STRATA MANAGEMENT SOLUTION

StrataMax StrataCash TRATAPAY

What's New 3

1. Building Information Enhancement Overview 3
2. Security permissions for setting up Views 6
3. Setting up Views, Favourites and required fields 6

3.1 Setting up a View 6

3.2 Favourites and Quick View 7

3.3 Policies and Comments 8

4. Lot Type Editor 9
5. Reporting 10

5.1 Excel Local and Global Building Reports 10

5.2 Building Information Report 11

6. Record Meetings and Voting Details 12
7. Copy to Buildings 13
8. Inspections and other report categories 13
9. DocMax - Searchable Building Type and Regulatory Module fields 16
10. New WA Building Type Options 17
11. Notes - All Areas 17
12. Useful Links 18

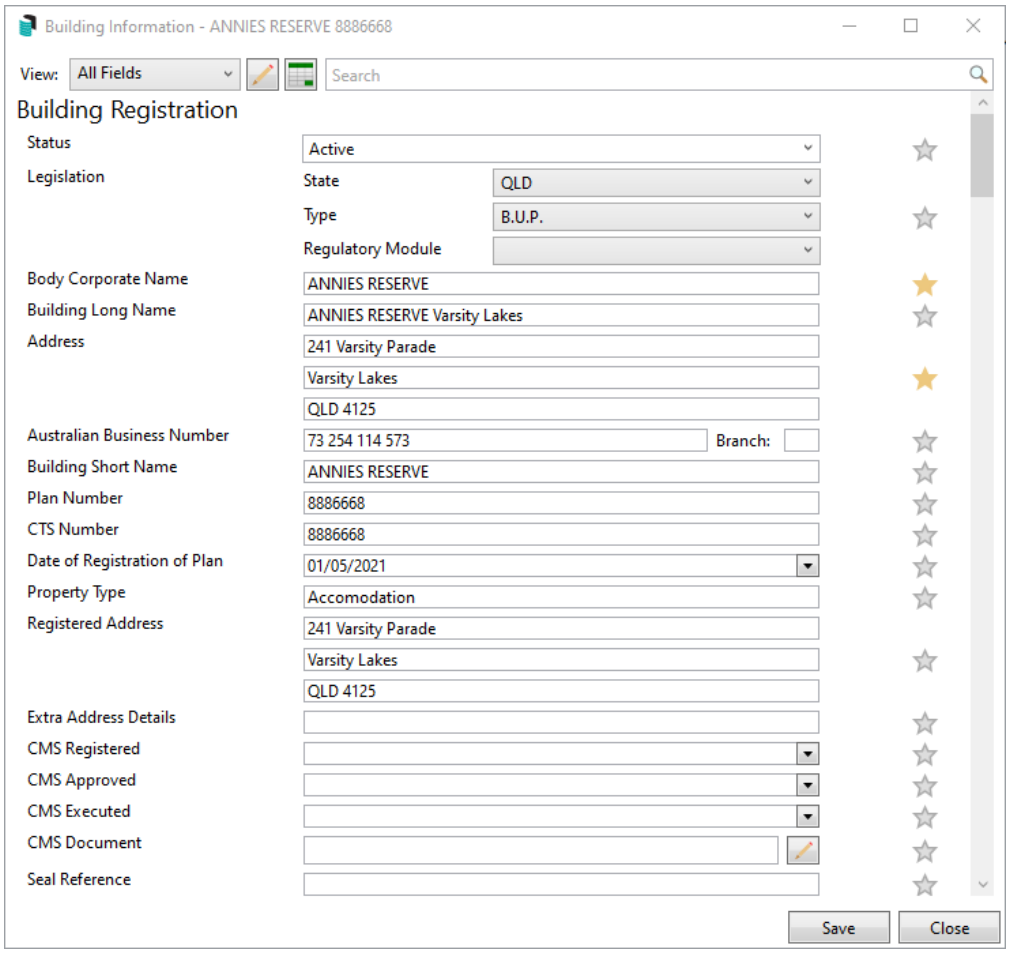
What's Better 19

What's New

1. Building Information Enhancement Overview

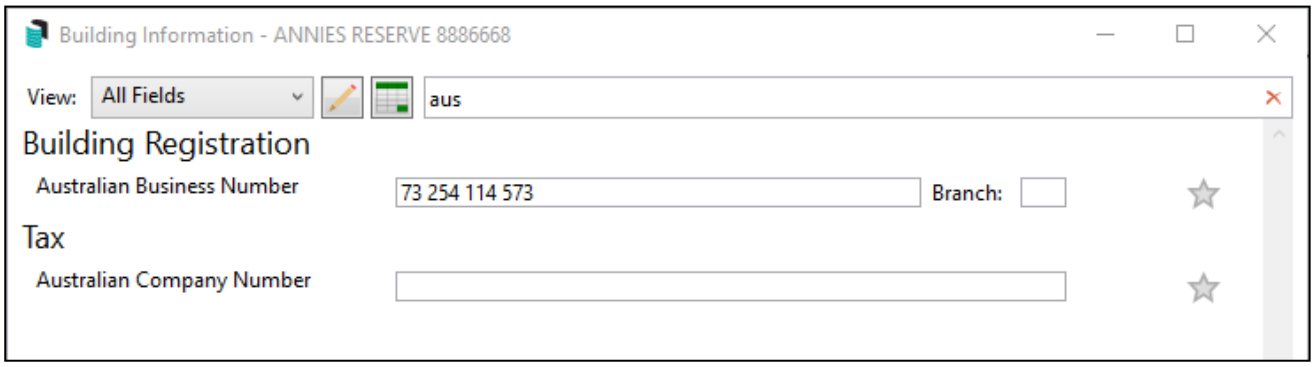
Info Update has been redesigned and is now called Building Information. This feature contains over 200 fields. This redesign will provide users with an easier interface and introduces a number of new features to allow customisation based on user & company requirements.

The new Building Information will replace the current Info Update, Building Info and Building Information modules. Specific fields relating to inspections will also be migrated to the Inspections Register as part of the upgrade process. See section 8 for details regarding report fields and categories.

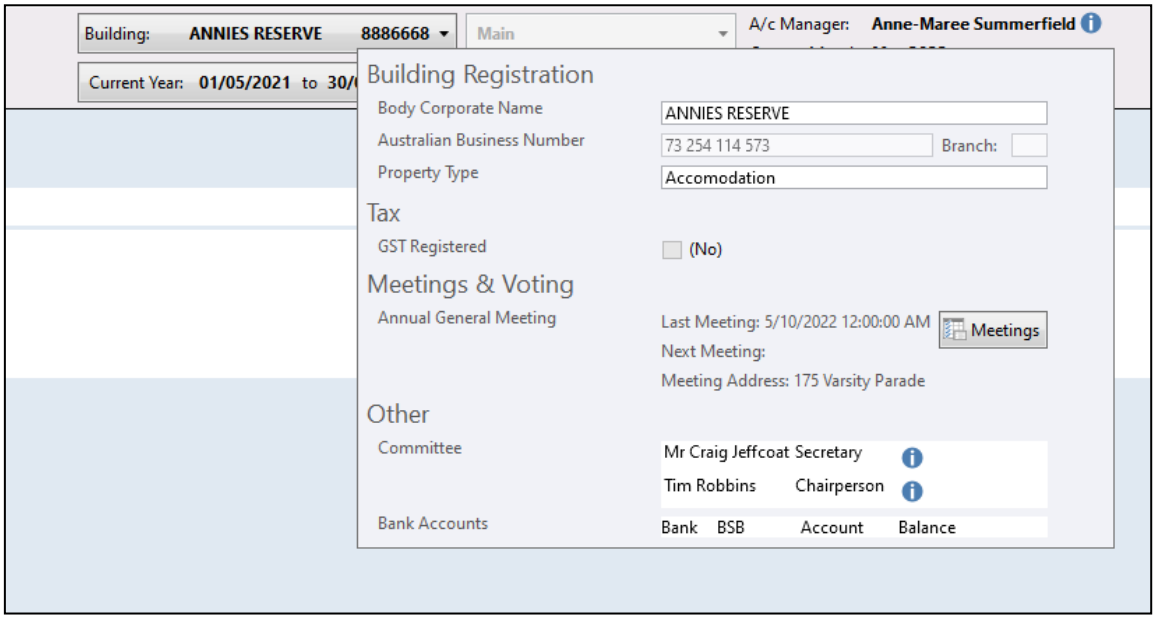


Some of the features included in the Info Update redesign:

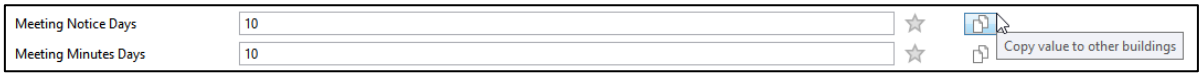
- Search Bar that filters displayed fields.



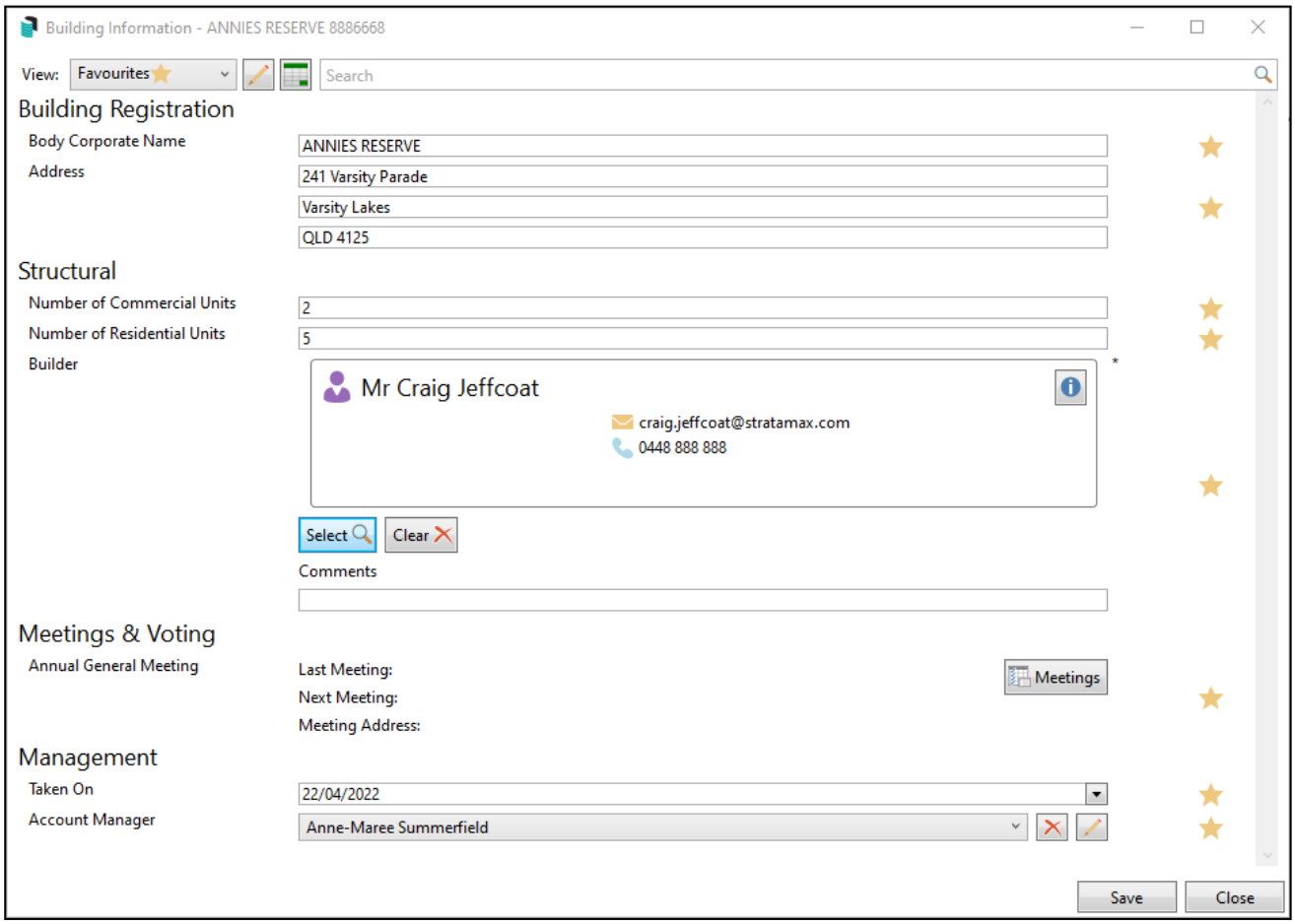
- Ability to configure 'Favourites' per user and view only these fields.
- Quick view of your Favourite fields.



- Ability to copy data to other buildings where applicable



- Ability to configure 'Company Policy fields' where users will see a prompt if the fields are left blank.
- Ability to create custom views which will only display the configured fields when selected.
- Ability to report custom views to Excel for a building or multiple buildings.
- Ability to record multiple meetings and fields available for each meeting.
- Automatically populated / read only fields for information such as number of lots, lots by category and bank account details.
- Contacts are used for recording individuals and companies with access to all the contact information.



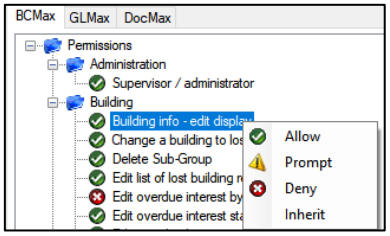
The new Building Information will allow StrataMax to add new fields when required if suitable. New fields included in this release are:

- Assistant Manager,
- Asset Manager
- Nabers Rating - Energy, Water, Waste and Indoor Environment,
- Interim/Final Occupation Certificate Date,
- Strata Renewal Committee Established,
- Quorum %
- Quorum Resolution Date.
- Emergency Contact

2. Security permissions for setting up Views

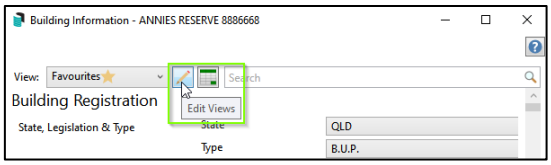
The existing 'Building Info - Edit Display' security setting will control access to set up Views in the Building Information screen. The Building Info - Create Save Frame control will no longer be required and has been removed.

To set access permissions to create views and required fields, navigate to security, use the filter to search for "Building Info - Edit Display' and set to Deny, Allow or Inherit as required. This will default to the current permission on upgrade.



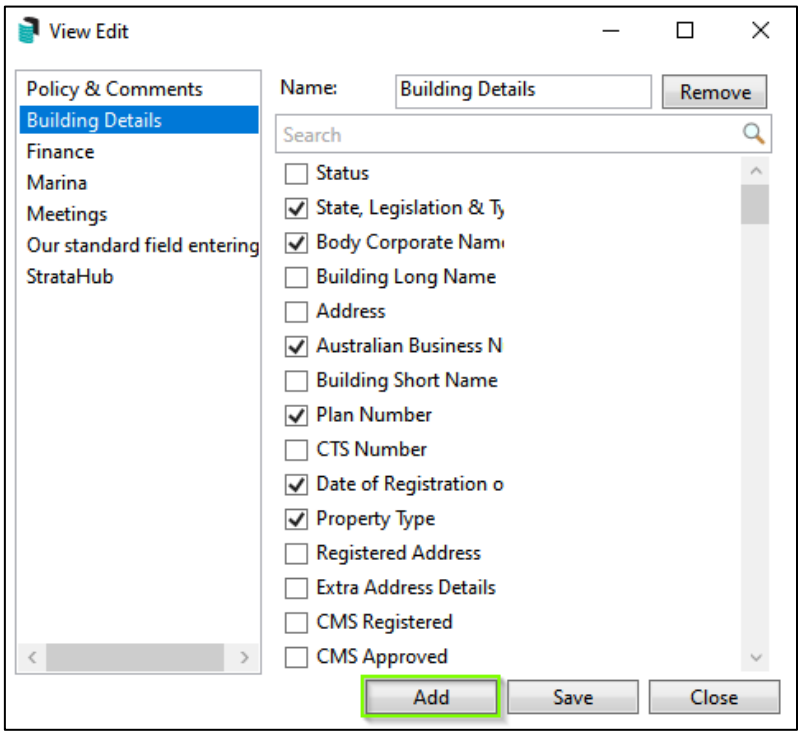
3. Setting up Views, Favourites and required fields

New Views (to display specific data) can be set up by clicking the pencil icon in the Building Information screen.

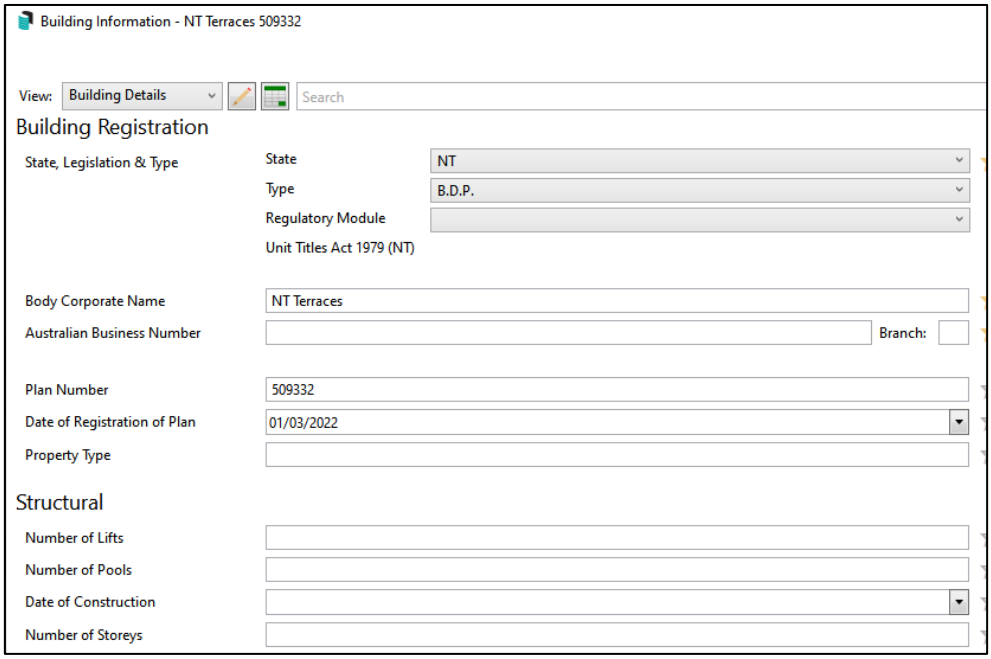


3.1 Setting up a View

Click Add to create a view and tick the fields to be displayed. For example, to create a view which will display building details, click Add and tick the building data fields you would like to see in one view. Name the view so it can be identified and save.

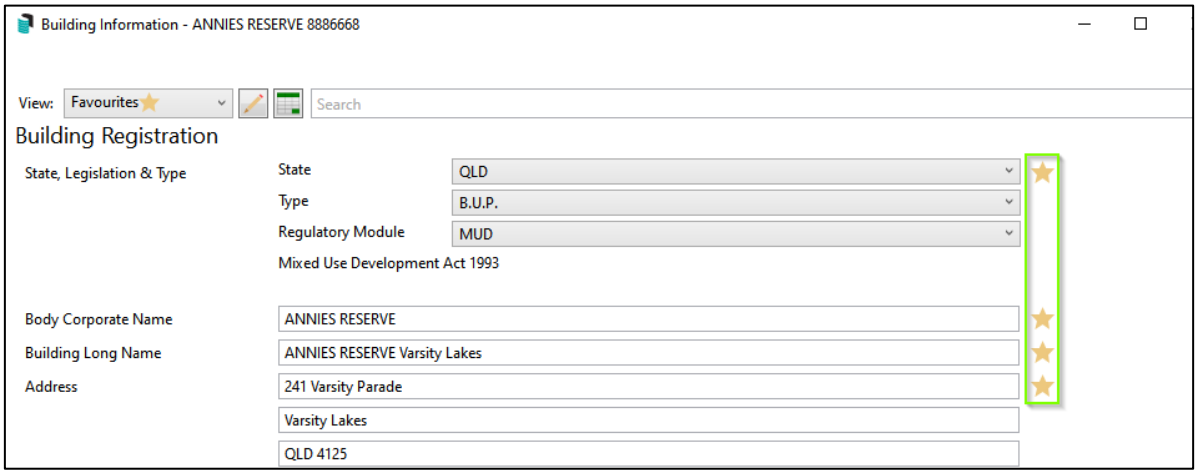


Once set, only those fields will be displayed when the Building Details View is selected.

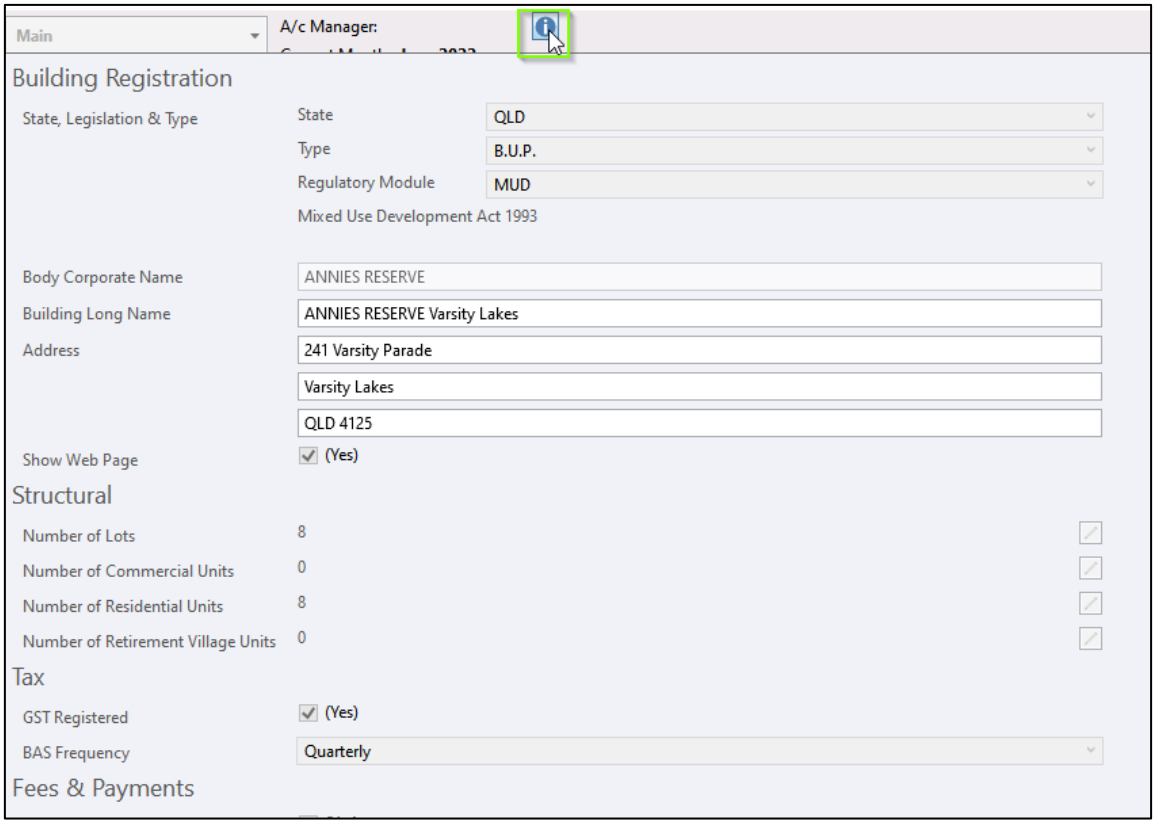


3.2 Favourites and Quick View

Add a favourite by clicking the star beside the field. These fields will be displayed when the 'Favourites' view is selected.

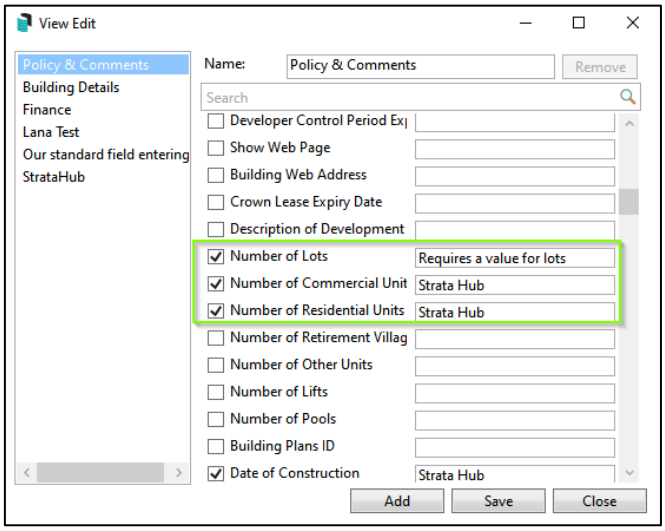


We have also included a new 'Quick View' icon which will display the Favourites as a tooltop or open Building Information when clicked.



3.3 Policies and Comments

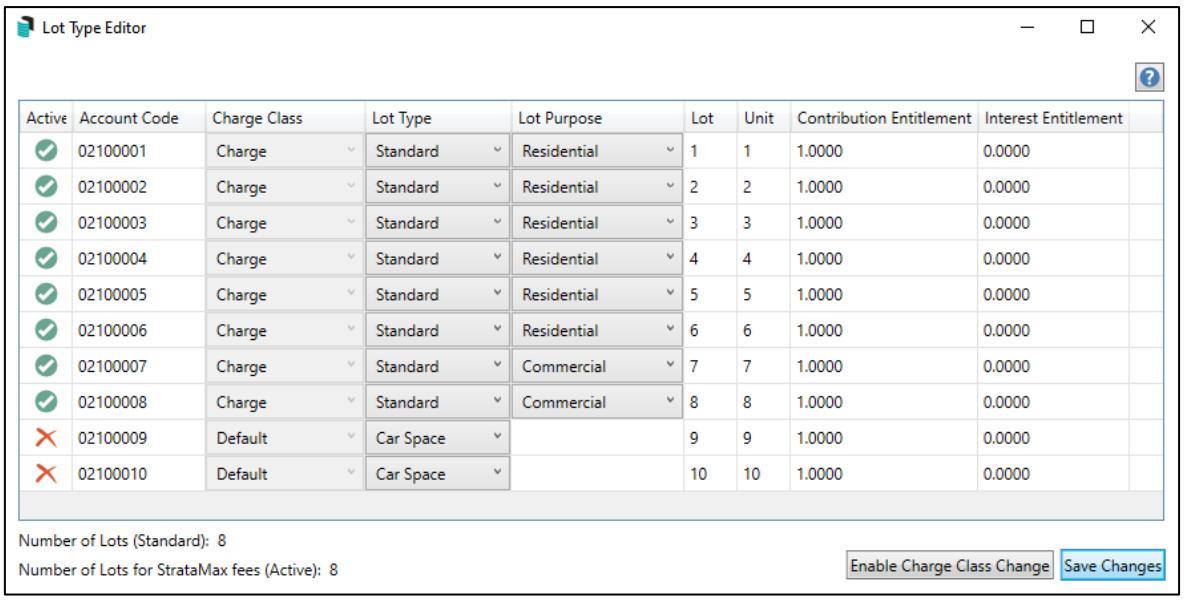
The Policies and Comments View provides the option to set specific fields as required and / or add supporting comments. Tick the fields you would like to display as a Company Policy field and / or type a comment to display.



Once saved, the comment will be displayed when reviewing Building Information.

4. Lot Type Editor

The Lot Type Editor can be accessed by clicking the Edit icon beside Number of Lots. For example, set the type as Residential or Commercial depending on its use.



This will update the number of the corresponding lot types in the Building Information screen.

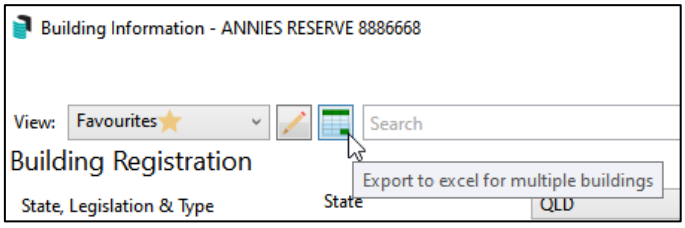
Please Note: The 'Enable Charge Class Change' option is password protected and managed by the StrataMax Support Team. Please contact Support if you need to use this option.

Please Note: If using 'Change existing Entitlements' the Lot type may need to be changed in the Lot Editor screen if required.

5. Reporting

5.1 Excel Local and Global Building Reports.

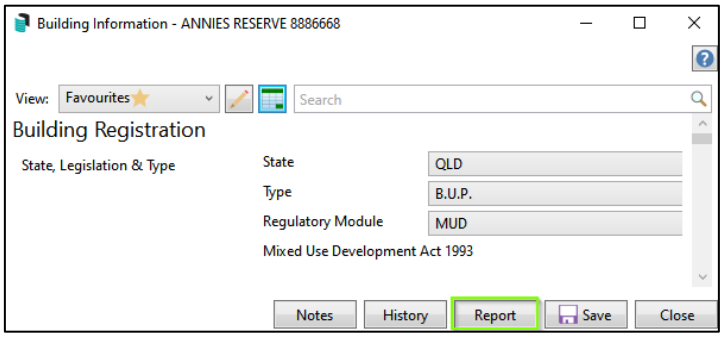
The data in each View can be exported to an Excel report for a single, or multiple buildings. Click the Excel icon in the Building Information screen to run. Select one or multiple buildings and the data for the selected view will be produced in Excel.



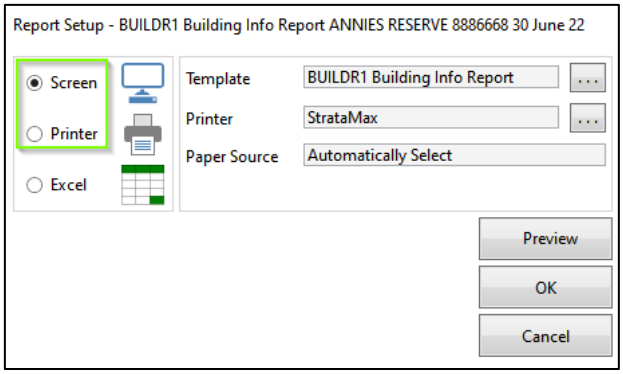
Select the 'All Fields' view to export all available info

5.2 Building Information Report

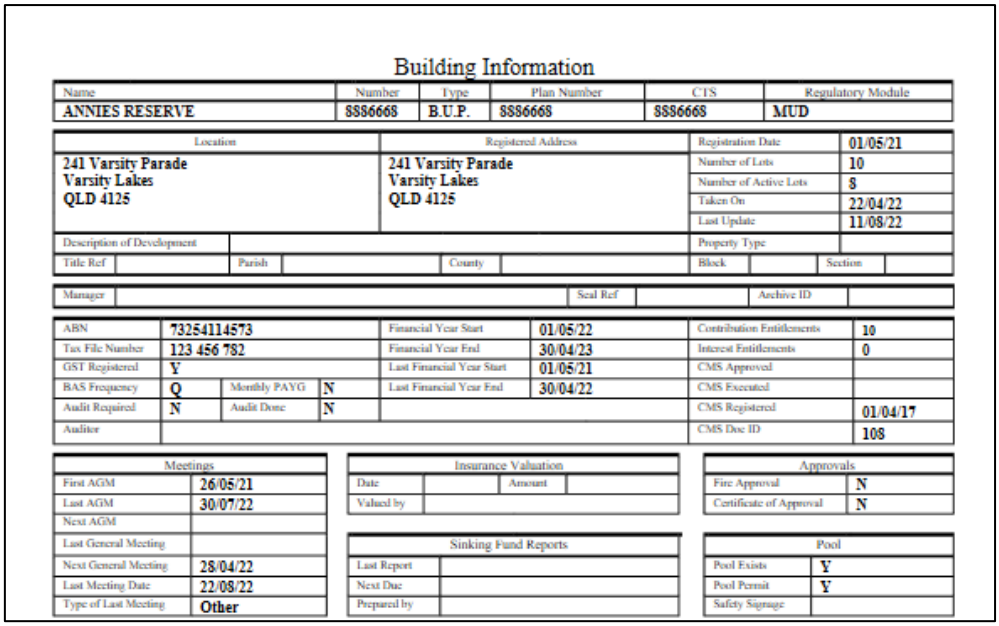
The original Building Information Report is still available by clicking 'Report' in the Building Information screen,



Set the report conditions to 'Screen' or Printer only and click OK.



The original Building Information Report will be produced:



Building Information

Name	Number	Type	Plan Number	CTS	Regulatory Module
ANNIES RESERVE	8886668	B.U.P.	8886668	8886668	MUD

Location	Registered Address		
241 Varsity Parade Varsity Lakes QLD 4125	241 Varsity Parade Varsity Lakes QLD 4125	Registration Date	01/05/21
		Number of Lots	10
		Number of Active Lots	8
		Taken On	22/04/22
		Last Update	11/08/22
Description of Development		Property Type	
Title Ref / Parish / County		Block / Section	
Manager / Seal Ref / Archive ID			

ABN	73254114573		Financial Year Start	01/05/22	Contribution Entitlements 10
Tax File Number	123 456 782		Financial Year End	30/04/23	Interest Entitlements 0
GST Registered	Y		Last Financial Year Start	01/05/21	CMS Approved
BAS Frequency	Q	Monthly PAYG N	Last Financial Year End	30/04/22	CMS Executed
Audit Required	N	Audit Done N			CMS Registered 01/04/17
Auditor					CMS Doc ID 108

Meetings	
First AGM	26/05/21
Last AGM	30/07/22
Next AGM	
Last General Meeting	
Next General Meeting	28/04/22
Last Meeting Date	22/08/22
Type of Last Meeting	Other

Insurance Valuation			
Date		Amount	
Valued by			

Sinking Fund Reports	
Last Report	
Next Due	
Prepared by	

Approvals	
Fire Approval	N
Certificate of Approval	N

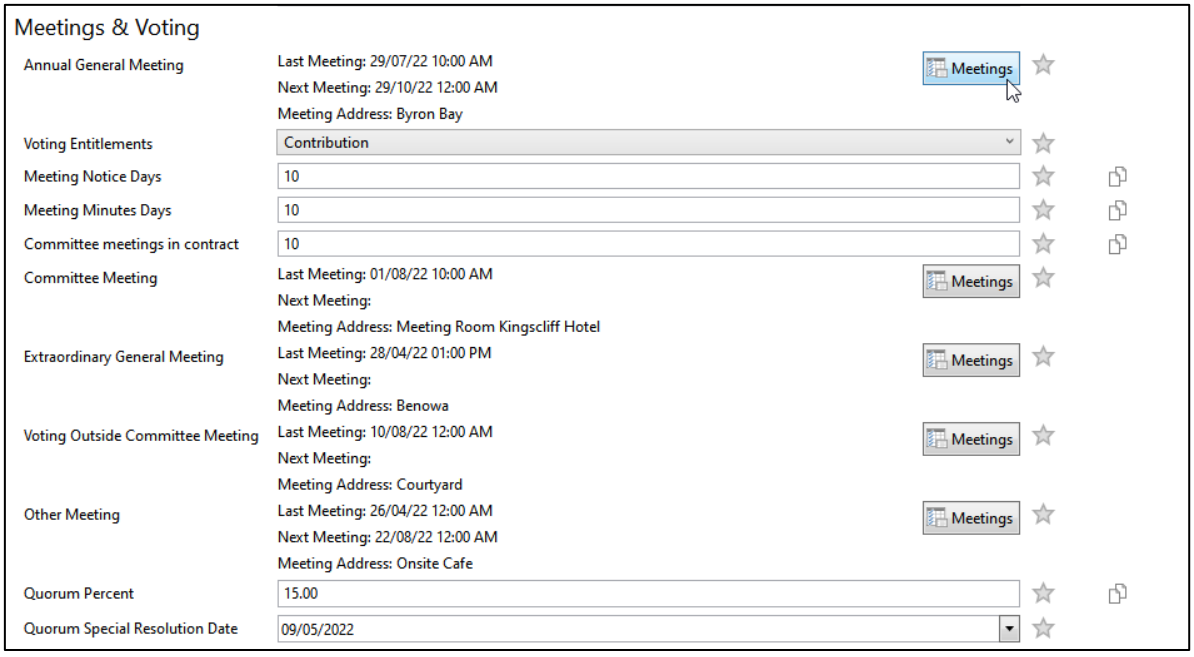
Pool	
Pool Exists	Y
Pool Permit	Y
Safety Signage	

Note:

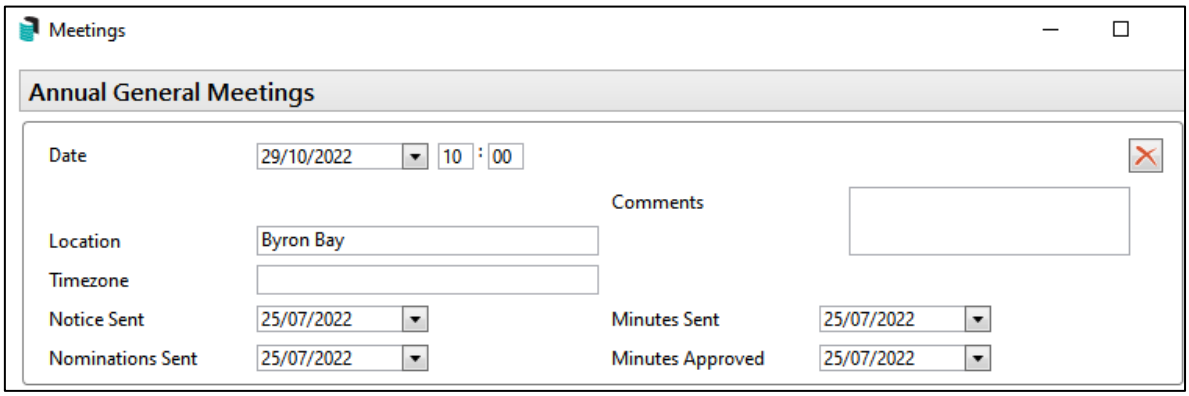
- The Export to Excel and the Preview options are not relevant for this report and will be removed in a future release.
- The Global Building Info Report has been removed from Report / Utilities global as it can now be run from Building Information.

6. Record Meetings and Voting Details

Record and keep an historical record of Meetings held by entering the details in the Meeting section of Building Information. Record date, time, location and notice distribution dates for Annual General Meeting, Committee meetings, Extraordinary Meetings or Other Meetings.

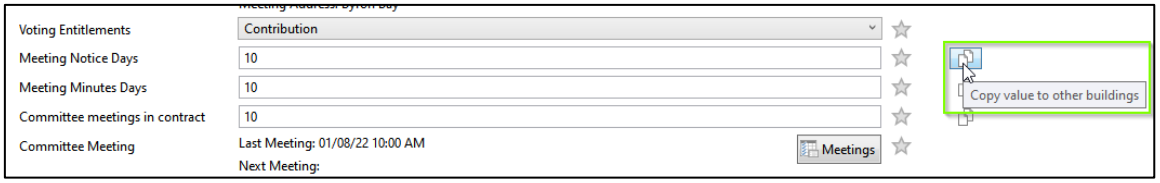


Click the "Meeting' button beside the meeting type you want to set up and add the details as required.



7. Copy to Buildings

We have added the ability to 'Copy Value to Other Buildings' for certain fields. The copy icon will show beside fields that can be copied to other buildings.



Click the 'Copy Value to Other Buildings' icon and select the building/s you want to copy the value to. The data will then be replicated in the selected buildings.

8. Inspections and other report categories

The following fields have been removed from Building Information and migrated to the Inspections register. The category will determine the reporting location. Categories are listed in **bold** below and the corresponding data fields are listed under each category:

LIFT REGISTRATION

Next Registration Due

BACKFLOW TESTING

Last Backflow Tested

Next Backflow Test Due

Backflow Tested by

MAINTENANCE REPORT

Last Maintenance Report

Next Maintenance Report Due

Maintenance Report Prepared By

PAINTING

Date Last Painted

PEST CONTROL

Pest Control Last Inspected

Pest Control Next Due

WORKPLACE H & S

Workplace H & S Last Inspected

Workplace H & S Next Due

EMERGENCY LIGHTING

Emergency Lighting Last Inspected

Emergency Lighting Next Due

TERMITE

Termite Last Inspected

Termite Next Due

FIRE SAFETY EQUIPMENT

Fire Safety Equipment Last Inspected

Fire Safety Equipment Next Due

ASBESTOS

Asbestos Inspection

Asbestos Present

SWITCHBOARD

Last Switchboard Inspection

Next Switchboard Inspection Due

SINKING FUNDS REPORT

Sinking Fund Report Prepared By

Last Sinking Fund Report

Next Sinking Fund Report Due

INSURANCE VALUATION

Insurance Valuation Date

Insurance Valuation

Insurance Valuation By

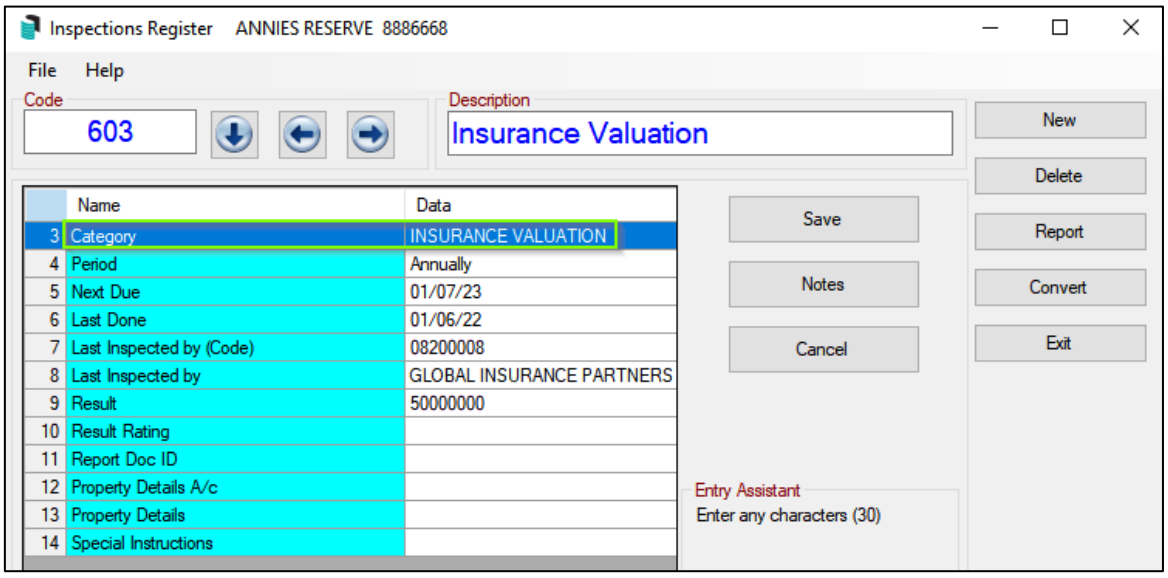
BUILDING VALUATION

Building Valuation Date

Building Valuation Amount

Building Valuation by

In the Inspections register, a new record can be created if required by setting the category for the corresponding report. For example, if you need to populate the 'Insurance Valuation' section of the report, create an Inspection Register record where the category is 'INSURANCE VALUATION' and populate the required data.

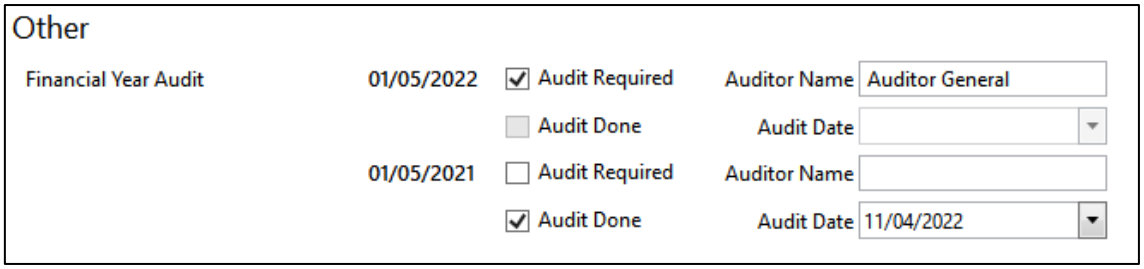


The data will then output to the Building Information Report.

Insurance Valuation			
Date	**01/06/22**	Amount	**50000000**
Valued by	**GLOBAL INSURANCE PARTNERS**		

Please Note: When adding a record in the register, categories need to be created exactly as listed to output correctly.

Last Audit Date can be added in the Other section of Building information:

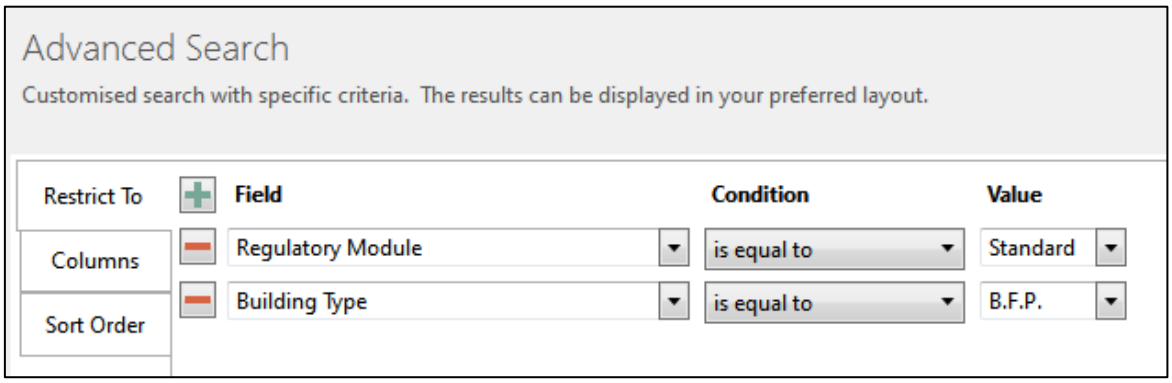


Please Note: The API will continue to output field data as per current functionality.

9. DocMax - Searchable Building Type and Regulatory Module fields

New fields have been added to DocMax which will filter the documents returned by Building Type and Regulatory Module.

In the Restrict To view, add a field and use the drop-down arrow to select the new fields and set the required condition and value criteria. Only documents from these building types / modules will be returned. These fields can also be included in Saved Searches and Work queues

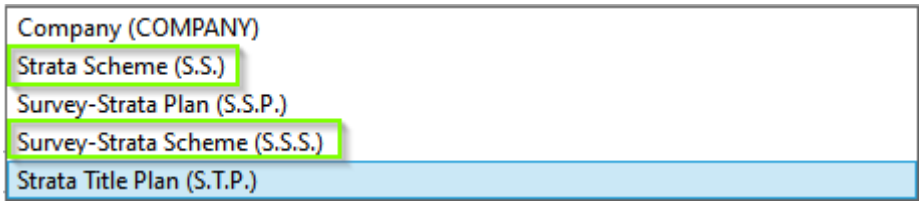


10. New WA Building Type Options

We have added two new building type options for Western Australian buildings selectable in Building Information and New BCMax Building screens.

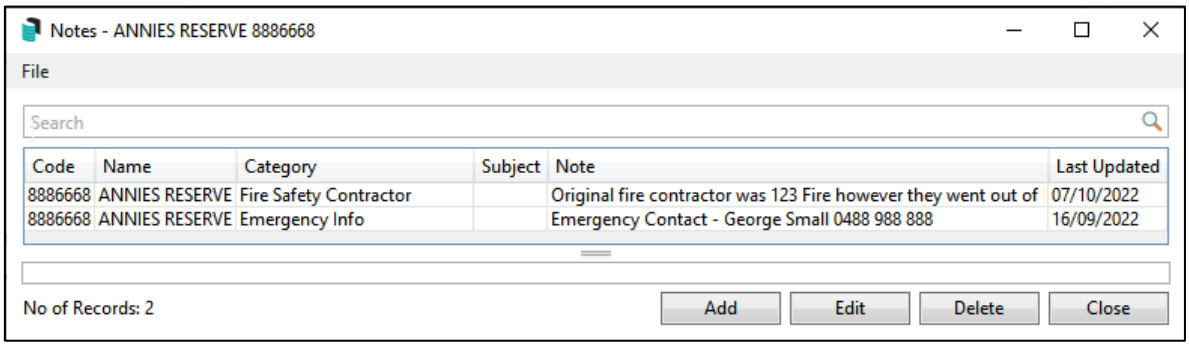
Strata Scheme (S.S.)

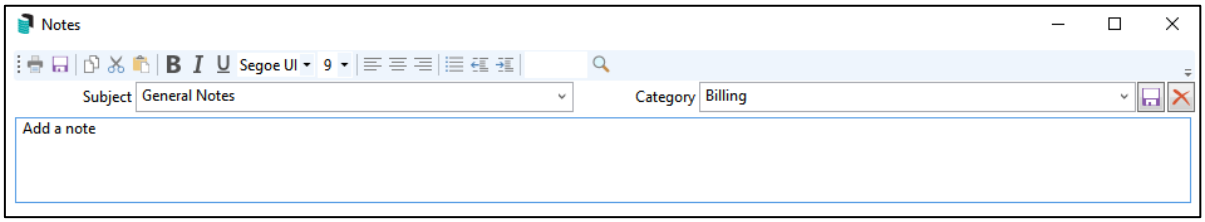
Survey-Strata Scheme (S.S.S)



11. Notes - All Areas

Note modules have been enhanced and now have a refreshed user interface. The new screen has been implemented in any location that notes can be added in BCMax and GLMax.





12. Useful Links

15 min summary/overview video of Building Information

Building Information Help Link

What's Better

- Data Health Configuration - A new setting 'Lost Building Expiry' has been added - Set count for how many months a building must be lost for before automatic deletion; 0 meaning do not delete.
- DocMax - The invoice hub building active status message shown in Invoice Details was incorrect. Message will now check Invoice Hub status and report reliably.
- Contact Management - Duplicate contact search by Email Address - will no longer show 'hidden' contacts.
- Utility Billing - Legacy Utility billing templates were producing a second, blank page after new deposit slip code was introduced. This has been corrected.
- Bendigo Banking – If a bank account had no transactions in the statement file, but did have a balance recorded then no statementinfoheader was being created. When running a month end rollover, the 'Last Days Banking Not Done' message was appearing. This has now been resolved