

PropertyIQ™

Motions Library

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INTRODUCTION TO MOTIONS LIBRARY

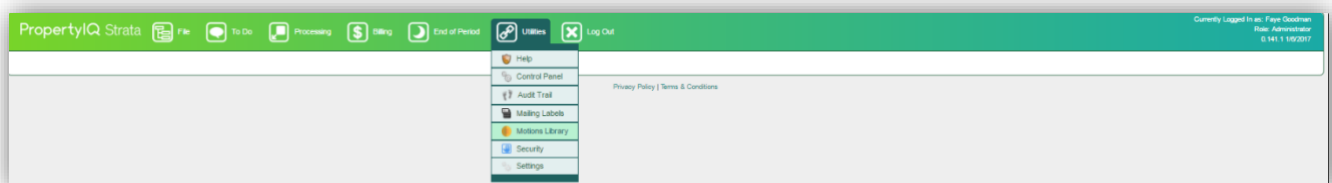
The motions library allows you to create a library of motions that you can utilise across different meetings and different buildings. The creation and editing of motions from the motions library is global function and will affect the motions that are available across all new meetings for all buildings in your company.



Permission to create and edit motions globally is usually an administrator's role. For full details about roles and permissions, see the manual "Users, Roles and Permissions".

GETTING STARTED

To get started, go to the Utilities menu and select *Motions Library*



1. The default status is to view all active motions, but you can toggle between the boxes to view *All* or *Inactive* statuses
2. Click on a column heading to sort the screen by that heading
3. You can type some key letters in any of the empty boxes on the top line to refine your search.
4. The description shows here. You can click in the box on the left or click on the M\motion to highlight it on the screen
5. Standard motions show with a tick. Standard motions are attached to nominated meeting types (see section below). Non standard motions have a cross. They are not automatically attached to any meetings, but you can add them as needed when you are creating a meeting agenda for a specific meeting. For example, you could create a motion to allow a Lot owner to have a pet, this wouldn't need to be attached to every meeting but would be available when you need it.
6. Standard motions have a motion number. The motion number shows here. (This determines the order it appears in when it is attached to a meeting, but they can be re-ordered from within the meeting if needed)
7. The type of motion shows here.
8. The resolution type shows here. This varies depending on your state.
9. *Clone* to clone an existing motion you have highlighted on the screen
10. *+Add* to add a new motion
11. *View* to open an existing motion that you have highlighted on the screen. You will then be able to edit it

PropertyIQ Strata File To Do Processing Billing End of Period Utilities Log Out 1 Currently Logged In as: **ams**
Role: Super Administrator 0 155 1 276/2018








Motions Library

Description	Standard Motion	Motion #	Motion Type	Resolution Type
<input checked="" type="checkbox"/> Accept Minutes of the Previous Meeting	✓	1	Statutory	Ordinary Resolution
<input type="checkbox"/> Election of Committee	✓	2	Statutory	Ordinary Resolution
<input type="checkbox"/> Appointment of Strata Managing Agent	✓	2	Statutory	Ordinary Resolution
<input type="checkbox"/> Insurance Quote Acceptance Motion	✓	4	Statutory	Ordinary Resolution
<input type="checkbox"/> Insurance Valuation	✓	5	Statutory	Ordinary Resolution Without Proxies
<input type="checkbox"/> Gardening Quotes	✗	0	Alternative	Ordinary Resolution
<input type="checkbox"/> New by-law for visitor car parks	✗	0	Committee	Special Resolution
<input type="checkbox"/> Roof Repairs	✗	0	Owner	Ordinary Resolution
<input type="checkbox"/> Gardening Quotes - copy	✗	0	Alternative	Ordinary Resolution
<input type="checkbox"/> Permission to keep pet	✗	7	Owner	Ordinary Resolution

9 10 11
Clone + Add View

ADDING NEW MOTIONS




Click *Add* from the motions library screen to get started.

PropertyIQ Strata  File  To Do  Processing  Billing  End of Period  Utilities  Log Out Currently Logged in as: smm
Role: Super Administrator
0.155.1 27/02/2019

Motions Library

All Active InActive

<input type="checkbox"/>	Description	Standard Motion	Motion #	Motion Type	Resolution Type
<input checked="" type="checkbox"/>	Accept Minutes of the Previous Meeting	✓	1	Statutory	Ordinary Resolution
<input type="checkbox"/>	Election of Committee	✓	2	Statutory	Ordinary Resolution
<input type="checkbox"/>	Appointment of Strata Managing Agent	✓	2	Statutory	Ordinary Resolution
<input type="checkbox"/>	Insurance Quote Acceptance Motion	✓	4	Statutory	Ordinary Resolution
<input type="checkbox"/>	Insurance Valuation	✓	5	Statutory	Ordinary Resolution Without Proxies
<input type="checkbox"/>	Gardening Quotes	✗	0	Alternative	Ordinary Resolution
<input type="checkbox"/>	New by-law for visitor car parks	✗	0	Committee	Special Resolution
<input type="checkbox"/>	Roof Repairs	✗	0	Owner	Ordinary Resolution
<input type="checkbox"/>	Gardening Quotes - copy	✗	0	Alternative	Ordinary Resolution
<input type="checkbox"/>	Permission to keep pet	✗	7	Owner	Ordinary Resolution

 Clone  Add  View

AGENDA TAB

The agenda tab is where you enter the standard wording for the body of the motion. Users can then edit the motions as required for individual meetings.

CREATING A NEW NON-STANDARD MOTION

1. Click *Add* to get started
2. Type a description for the motion for internal use. This won't show on any documents but is an internal identifier.
3. The description you typed above will show here as the motion title by default, but you can overtype if you want to change it. The motion title will show on the motion reports documents.
4. Choose the motion type from the dropdown list here. The choices are:
 - i. Statutory
 - ii. Committee
 - iii. Owner
 - iv. Alternative
5. Choose the type of resolution here. These are the choices available for all states but you should choose the correct options for your State.
 - i. Ordinary Resolution
 - ii. Resolution without dissent
 - iii. Special Resolution
 - iv. Majority Resolution
 - v. General Resolution
 - vi. Unanimous Resolution
 - vii. Interim Special Resolution
 - viii. Interim Ordinary Resolution
 - ix. Ordinary Resolution without proxies
6. If you chose the motion type as statutory in step 4, this will be auto ticked, but you can untick it if you want
7. If you chose the motion type as committee in Step 4, this will be auto ticked but you can untick it if you want
8. If you chose the motion type as owner in step 4 this will be auto ticked, but you can untick it if you want. You can attach the relevant lot owner for each individual meeting motion when you are editing in the individual meeting.
9. Leave this area unticked. This is used when you are creating standard motions and you want them to be automatically attached to specific meeting types.
10. The voting settings can be edited when the user is editing motions just for a specific meeting. The default voting setting is Yes/No. The option to allow attendees to abstain can be ticked. You can also choose the option of providing alternative clauses for the meeting to consider. (see section below – Alternative Clauses).
11. You can use the editing functions to format your text
12. To insert merge fields – place your cursor in the position you want the merge field to appear. Use the slider to slide up and down and view all available merge fields. Click on a merge field to insert it into a document.
13. Type the body of your motion
14. Click Save when you are ready

PropertyIQ
Motions Library
17.02.2020
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CREATING A NEW STANDARD MOTION


1. Click **Add** to get started
2. Type a description for the motion for internal use. This won't show on any documents but is an internal identifier.
3. The description you typed above will show here as the motion title by default, but you can overtype if you want to change it. The motion title will show on the motion reports documents.
4. Choose the motion type from the dropdown list here. The choices are:
 - i. Statutory
 - ii. Committee
 - iii. Owner
 - iv. Alternative
5. Choose the type of resolution here. These are the choices available for all states but you should choose the correct options for your State.
 - i. Ordinary Resolution
 - ii. Resolution without dissent
 - iii. Special Resolution
 - iv. Majority Resolution
 - v. General Resolution
 - vi. Unanimous Resolution
 - vii. Interim Special Resolution
 - viii. Interim Ordinary Resolution
6. Standard motions should be numbered. This will determine the order in which they appear by default when adding them to a new meeting. You can rearrange the order from within the individual meeting if required.
7. If you chose statutory as the motion type in step 4, this will be auto ticked. Standard motions will be automatically attached to new meetings when they are created, based on the meeting types you attach them to.
8. These will not be ticked for a standard motion.
9. Click to select the meeting types you want this standard motion to be attached to. When users create a meeting of any of the types selected, this motion will automatically be attached to it.
10. The voting settings can be edited when the user is editing motions just for a specific meeting. The default voting setting is Yes/No. The option to allow attendees to abstain can be ticked. You can also choose the option of providing alternative clauses for the meeting to consider. (see section below – Alternative Clauses).
11. You can use the editing functions to format your text.
12. To insert merge fields – place your cursor in the position you want the merge field to appear. Use the slider to slide up and down and view all available merge fields. Click on a merge field to insert it into a document.
13. Type the body of your motion
14. Save when you are ready

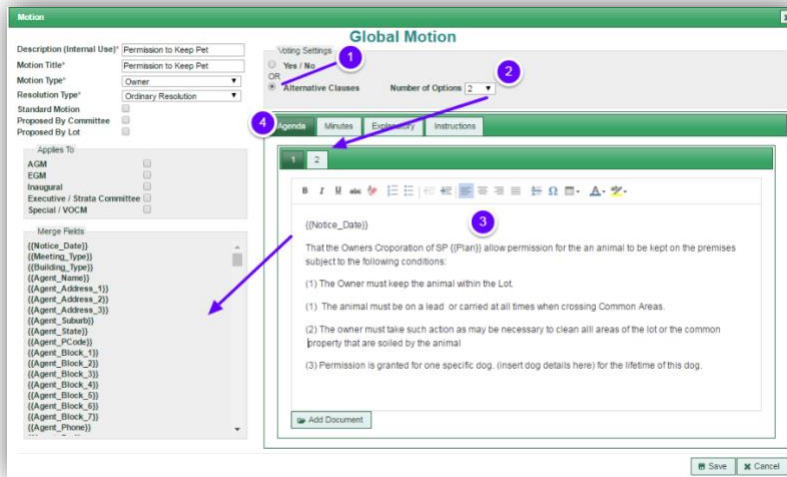
The screenshot shows the 'Global Motion' form with the following elements and callouts:

- 1:** Points to the 'Add' button at the bottom right of the form.
- 2:** Points to the 'Description (Internal Use)' field.
- 3:** Points to the 'Motion Title' field.
- 4:** Points to the 'Motion Type' dropdown menu.
- 5:** Points to the 'Resolution Type' dropdown menu.
- 6:** Points to the 'Standard Motion' checkbox.
- 7:** Points to the 'Proposed By Committee' checkbox.
- 8:** Points to the 'Proposed By Lot' checkbox.
- 9:** Points to the 'Applies To' section with checkboxes for AGM, EGM, Inaugural, Executive / Strata Committee, and Special / VOCM.
- 10:** Points to the 'Voting Settings' section with options for Yes/No, Abstain, and Alternative Clauses.
- 11:** Points to the text formatting toolbar above the main text area.
- 12:** Points to the merge field insertion point in the text area.
- 13:** Points to the main text area where the motion body is typed.
- 14:** Points to the 'Save' button at the bottom right of the form.

The form also includes a 'Merge Fields' list on the left side, containing fields like {{Notice_Date}}, {{Meeting_Type}}, {{Building_Type}}, {{Agent_Name}}, {{Agent_Address_1}}, {{Agent_Address_2}}, {{Agent_Address_3}}, {{Agent_Suburb}}, {{Agent_State}}, {{Agent_PCode}}, {{Agent_Block_1}}, {{Agent_Block_2}}, {{Agent_Block_3}}, {{Agent_Block_4}}, {{Agent_Block_5}}, {{Agent_Block_6}}, {{Agent_Block_7}}, and {{Agent_Phone}}.

VOTING SETTING – ALTERNATIVE CLAUSES

1. Click here to enable alternative clauses
2. Choose the number of alternative clauses you want to include from the dropdown list. The minimum is two and the maximum is ten. Tabs will now show here. If you chose two there will be two tabs, if you chose three, there will be three tabs and so on. Click on each numbered tab to toggle between each alternative clause
3. Type the body of your alternative clause  If they are similar, it is easiest to copy and paste and then edit each clause.



You can add documents to each of the alternative motions. This is normally done at the time a motion is being added to a meeting as it is specific to a meeting, but if you want the same document to appear for every meeting, then attach at this point.

MINUTES TAB

The minutes tab is where you can record standard wording for all the possible results of a motion. Users can then edit the results as required for individual meetings.



Not all the merge fields that show in the motion agenda report show on the minutes motion report, due to variations such as the budget status changing between notice and minutes, so it is best to test these before sending any documents.

Go to the motion minutes tab

1. If you have selected the voting settings as Yes/No, you can record the standard wording for the Yes vote by clicking on the Yes tab. Record the standard wording for a No vote by clicking on the No tab
2. You can use the editing tools to edit the details
3. You can use any of the available merge fields (see agenda tab instructions above for details of how to use merge fields)
4. Type the body of the wording
5. *Save* when you are ready

Motion

Description (Internal Use)* Permission to keep pet

Motion Title* Permission to keep pet

Motion Type* Owner

Resolution Type* Ordinary Resolution

Standard Motion

Proposed By Committee

Proposed By Lot

Applies To

AGM ☐

EGM ☐

Inaugural ☐

Executive / Strata Committee ☐

Special / VOCM ☐

Merge Fields

{{Agent_Phone}}

{{Agent_Fax}}

{{Agent_Email}}

{{Agent_ABN}}

{{Agent_Principal}}

{{Building_Manager}}

{{Manager_Phone}}

{{Manager_email}}

{{Building_Id}}

{{Building_ABN}}

{{Strata_Plan}}

{{Building_Name}}

{{Building_Street_No}}

{{Building_Street_Name}}

{{Building_Address_2}}

{{Building_Suburb}}

{{Building_PCCode}}

{{Building_State}}

Global Motion

Editing this motion will affect all meetings added in the future

Voting Settings

☒ Yes / No ☒ Abstain

OR

☐ Alternative Clauses

Agenda **Minutes** Explanatory Instructions

Yes No Abstain

The Resolution was adopted by the Meeting:

That the Owners Corporation of SP {{Plan}} allow permission for the an animal to be kept on the premises subject to the following conditions:

(1) The Owner must keep the animal within the Lot.

(1) The animal must be on a lead or carried at all times when crossing Common Areas.

(2) The owner must take such action as may be necessary to clean all areas of the lot or the common property that are soiled by the animal

Deactivate Save Cancel

Continue to create the wording for all the possible outcomes. This is how the No result might look.

Motion

Description (Internal Use)* Permission to keep pet

Motion Title* Permission to keep pet

Motion Type* Owner

Resolution Type* Ordinary Resolution

Standard Motion

Proposed By Committee

Proposed By Lot

Applies To

AGM ☐

EGM ☐

Inaugural ☐

Executive / Strata Committee ☐

Special / VOCM ☐

Merge Fields

{{Agent_Phone}}

{{Agent_Fax}}

{{Agent_Email}}

{{Agent_ABN}}

{{Agent_Principal}}

{{Building_Manager}}

{{Manager_Phone}}

{{Manager_email}}

{{Building_Id}}

{{Building_ABN}}

{{Strata_Plan}}

{{Building_Name}}

{{Building_Street_No}}

{{Building_Street_Name}}

{{Building_Address_2}}

{{Building_Suburb}}

{{Building_PCCode}}

{{Building_State}}

Global Motion

Editing this motion will affect all meetings added in the future

Voting Settings

☒ Yes / No ☒ Abstain

OR

☐ Alternative Clauses

Agenda **Minutes** Explanatory Instructions

Yes No Abstain

the Resolution was not adopted by the Meeting. The {{Building_Manager}} is to investigate further and report back to the next Meeting.

Deactivate Save Cancel

This is how an abstain option might look

Standard Motion

Proposed By Committee

Proposed By Lot

Applies To

AGM ☐

EGM ☐

Inaugural ☐

Executive / Strata Committee ☐

Special / VOCM ☐

Merge Fields

{{Notice_Date}}

{{Meeting_Type}}

{{Building_Type}}

{{Agent_Name}}

{{Agent_Address_1}}

{{Agent_Address_2}}

{{Agent_Address_3}}

{{Agent_Suburb}}

{{Agent_State}}

{{Agent_PCCode}}

{{Agent_Block_1}}

{{Agent_Block_2}}

{{Agent_Block_3}}

{{Agent_Block_4}}

{{Agent_Block_5}}

{{Agent_Block_6}}

{{Agent_Block_7}}

{{Agent_Phone}}

Global Motion

Editing this motion will affect all meetings added in the future

Agenda **Minutes** Explanatory Instructions

Yes No Abstain

.....Members resolved to abstain from voting do to potential conflicts of interest.

Edit Done

ALTERNATIVE CLAUSES

If the motion has alternative clauses, you can enter the possible outcomes for each clause

1. Go to the motion minutes tab
2. You will see the numbered tabs here. The number you see depends on how many alternative clauses you entered in the agenda. You can toggle between them to create, view and edit each possible outcome.
3. You can use the editing tools to edit the details
4. You can use any of the available merge fields (see agenda tab instructions above for details of how to use merge fields)
5. Type the body of the wording
6. Click Save when you are ready

The screenshot displays the 'Global Motion' editor in the PropertyIQ Strata system. The interface is divided into several panels. On the left, a list of motion types is shown, with 'Permission to keep pet' selected. The main central panel is titled 'Global Motion' and contains a 'Description (Internal Use)' field, a 'Motion Title' field, and a 'Resolution Type' dropdown. Below these are checkboxes for 'Standard Motion', 'Proposed By Committee', and 'Proposed By Lot'. A 'Merge Fields' list is visible on the left side of the main panel. The 'Minutes' tab is active, showing a text editor with a toolbar. The text in the editor describes a motion to allow a pet on the premises under specific conditions. Numbered callouts (1-6) highlight key features: 1 points to the 'Alternative Clauses' tab, 2 points to the 'Number of Options' dropdown, 3 points to the text editor toolbar, 4 points to the 'Merge Fields' list, 5 points to the motion text, and 6 points to the 'Save' button. On the right, a 'Resolution Type' list is visible, with 'Ordinary Resolution' selected.

EXPLANATORY TAB

The explanatory tab can be used to give meeting attendees some background about the motion. This is a legal requirement in some states.

1. From the motion, go to the explanatory tab
2. You can use the editing functions to format the text
3. Type the text here
4. *Save* when you are ready.


The screenshot displays the 'Global Motion' software interface. On the left, there are fields for 'Description (Internal Use)', 'Motion Title', 'Motion Type', 'Resolution Type', and checkboxes for 'Standard Motion', 'Proposed By Committee', and 'Proposed By Lot'. Below these are sections for 'Applies To' (AGM, EGM, Inaugural, Executive / Strata Committee, Special / VCOM) and 'Merge Fields'. The main area shows the 'Explanatory' tab selected, with a rich text editor containing the text: 'The Owner of Lot 1 has requested permission to keep one old dog on her lot. The dog is a four year old King Charles Cavalier Spaniel. She has advised that the dog is very quiet and house trained'. The interface includes a 'Voting Settings' section with 'Yes / No' and 'Abstain' options, and a 'Deactivate', 'Save', and 'Cancel' button bar at the bottom right. Numbered callouts 1 through 4 highlight the 'Alternative Clauses' option, the text editor toolbar, the text input area, and the 'Save' button respectively.

INSTRUCTIONS TAB

The instructions tab can be used to give the meeting attendees instructions about the motion. For example, how to vote.

1. From the motion, go to the instructions tab
2. You can use the editing functions to format the text
3. Type the text of the instructions
4. *Save* when you are ready

EDITING A MOTION

1. From the motions screen, type some key letters in any of the empty boxes on the top line to refine your search and find the motion you want to edit
2. Click on a motion to highlight it and then double click to select it or
3. *View*
4. *Edit* to start editing
5. Whenever you edit a global motion you will see this message, as any changes you make will affect all meetings added in the future.  Changes will not affect motions that are attached to meetings that have already been created.

1. Click on any of the tabs to start editing
2. You can make any changes you need to
3. *Deactivate* will make the motion no longer be available to attach to meetings but it can be reactivated if you need it later.
4. *Delete* if you want to remove the motion permanently
5. *Save* to keep your changes

CLONING A MOTION

If you have a lot of similar motions, you can clone an existing motion to save data entry.

1. From the motions library click on a motion you want to clone
2. Click the *Clone* button

Description	Standard Motion	Motion #	Motion Type	Resolution Type
Accept Minutes of the Previous Meeting	✓	1	Statutory	Ordinary Resolution
Election of Committee	✓	2	Statutory	Ordinary Resolution
Appointment of Strata Managing Agent	✓	2	Statutory	Ordinary Resolution
Insurance Quote Acceptance Motion	✓	4	Statutory	Ordinary Resolution
Insurance Valuation	✓	5	Statutory	Ordinary Resolution Without Proxies
Gardening Quotes	✗	0	Alternative	Ordinary Resolution
New by-law for visitor car parks	✗	0	Committee	Special Resolution
Roof Repairs	✗	0	Owner	Ordinary Resolution
Permission to keep pet	✗	7	Owner	Ordinary Resolution

1. The name of the original motion shows here with the additional word “copy”. Type the name of the new motion here.
2. Type the wording of the new motion here. Don’t forget to make changes to the minutes, explanatory and instructions tabs too, if required.
3. *Save*

The screenshot shows the 'Global Motion' software interface. On the left, the 'Description (Internal Use)' field is highlighted with a purple circle and the number 1. Below it, the 'Motion Title' field also contains 'Gardening Quotes - copy'. The 'Motion Type' is set to 'Alternative' and 'Resolution Type' is 'Ordinary Resolution'. Under 'Applies To', 'AGM', 'EGM', and 'Inaugural' are checked. A 'Merge Fields' list is visible below. The main area has tabs for 'Agenda', 'Minutes', 'Explanatory', and 'Instructions'. The 'Minutes' tab is active, showing a text editor with the text 'That the Owners Corporation {{Strata_Plan}} Accept the quote from (insert supplier name)'. This text area is highlighted with a purple circle and the number 2. At the bottom right, the 'Save' button is highlighted with a purple circle and the number 3. Other buttons include 'Deactivate', 'Delete', and 'Cancel'.