

PropertyIQ™

Documents


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INTRODUCTION TO DOCUMENTS

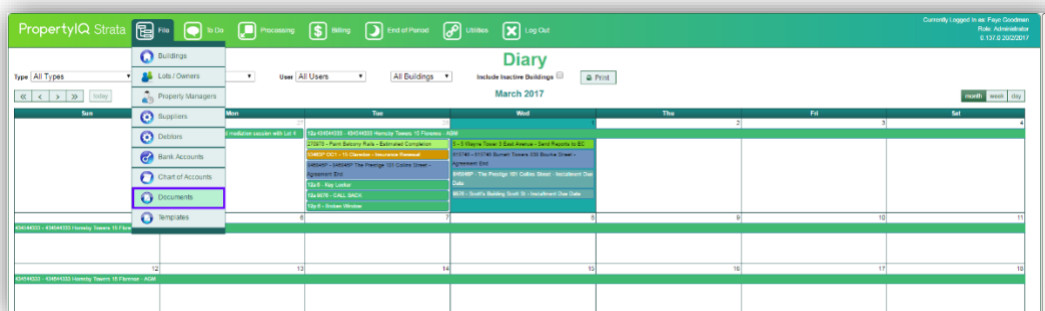
PropertyIQ has inbuilt document storage where all documents relating to your buildings are stored. Documents that are generated by PropertyIQ will be stored automatically and you can also upload other externally generated documents.

Documents are assigned to a Building, Lot Owner or Supplier. You can view all Documents from the Documents screen or view the documents relating to a Building from the Building Card, A lot Owner from the Lot Owner Card or a Supplier from the Supplier's card.

 You can upload external documents in PDF or Image – (JPEG or PNG) Format. PDF format is recommended in some contexts so you can preview the document on the screen. The maximum size of each document is 32 MB.

GETTING STARTED

To access the Documents screen go to  and Select Documents



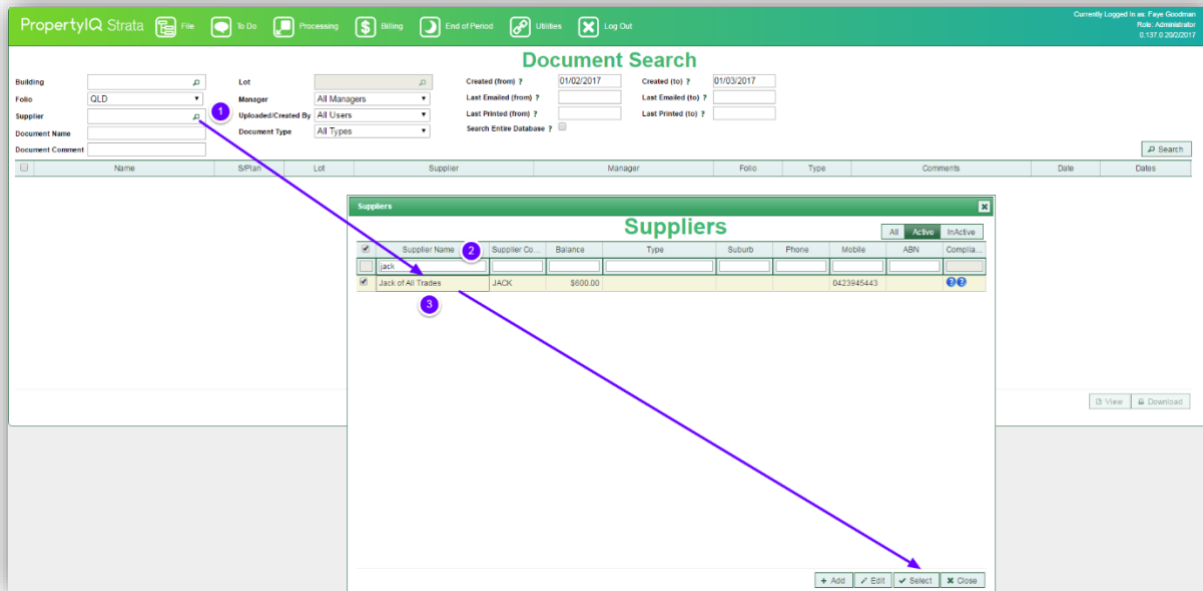
THE DOCUMENTS SCREEN

1. You can click in the boxes to open the calendar and enter a date range to refine your search
2. You can select individual documents on the screen by clicking on the boxes or click in the top line to select all
3. Click on a column heading to order the screen by that column
4. Type some key letters in any of the empty boxes on the top line to refine the view. If you refine the view down to a single strata plan and highlight at least one document, you will be able to upload to the owners portal.
5. Click *Advanced Search* to search for specific documents or across the whole database.
6. Click *+Document Entry* to start adding new documents. See the section below “Adding Documents”
7. The date the document was uploaded to the PropertyIQ or generated by PropertyIQ shows here
8. The document name shows in this column
9. All documents are attached to the strata plan they relate to. The strata plan number shows here
10. The building name, (if the strata plan has one) shows in this column
11. The street name shows in this column
12. If the document relates to a lot, the lot number shows here
13. If the document relates to a unit, the unit number shows here
14. The strata manager for the building shows here
15. If the document relates to a Supplier, the Supplier’s name shows here
16. The document type shows here. You can filter your view to a particular document type by typing some key letters in any of the empty boxes on the top line
17. Documents that have been uploaded to the owners portal have a green tick in this column. Documents that have not been uploaded to the portal will have a red cross in this column
18. You need to have the screen filtered to show documents for only one building for the *Publish to Portal* button to be enabled. See the section below for instructions to publish documents to the portal
19. Click on *Upload Metadata* to start entering metadata. See the section below for instructions to upload metadata
20. Click on the *View* to view a preview of the documents you have selected on the screen. See section below
21. Click on *Edit* to edit the details of a document you have selected on the screen.
22. Once you have selected some items on the screen you can click on the delete button to delete them from PropertyIQ altogether. (if you have delete permissions)

- [illegible]

To search for documents that relate to a particular supplier

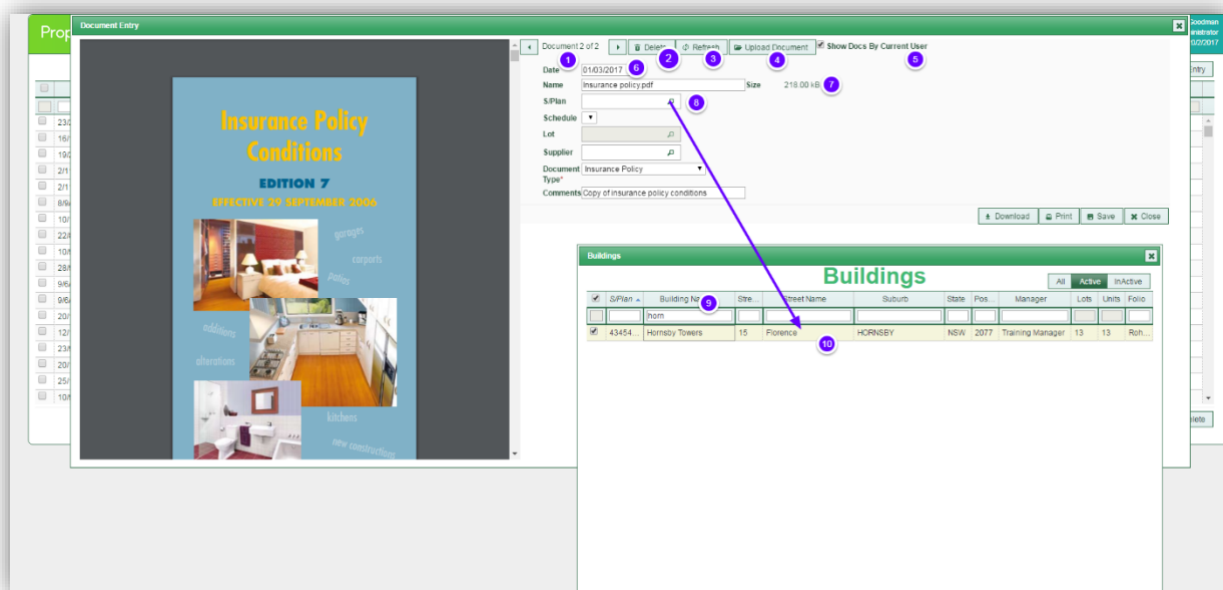
1. Click on the search Icon in the *Supplier* box to enable the supplier search screen
2. Type some key letters to refine your search and find the supplier you are looking for
3. Click on the supplier you want and then click *Select* at the bottom of the screen (or double click on the supplier you want)



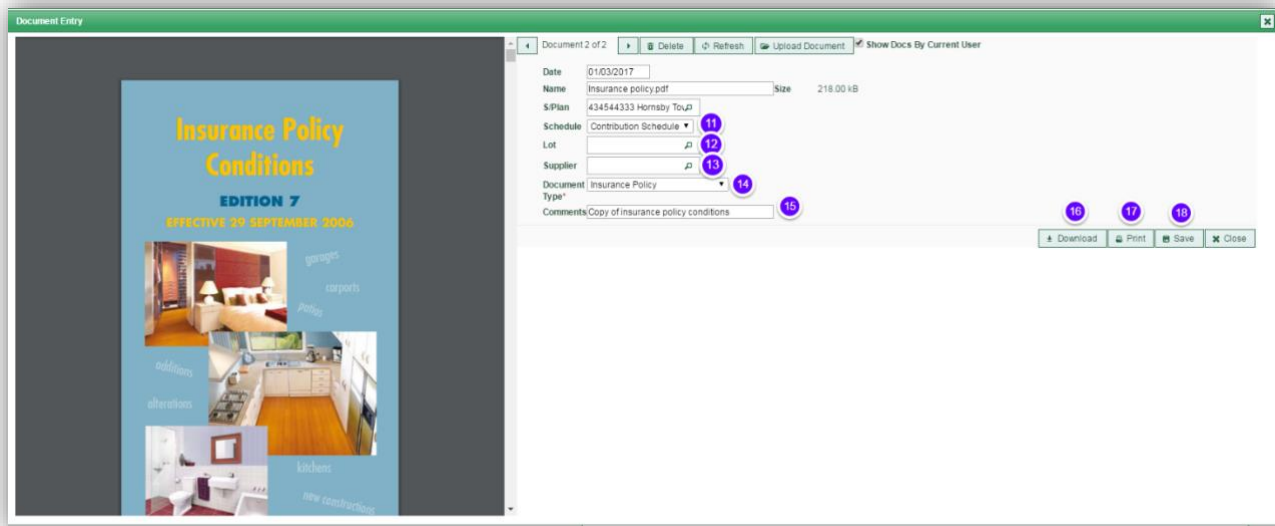
Enter information to filter your search:

1. Use the dropdown list to search for documents for a particular folio
2. Type the document name or part name here
3. Type document comments or part of the comments here. Documents generated by PropertyIQ will automatically have comments. For example. "Generated by Meeting Notice Generator"
4. Use the dropdown list to search for documents for one strata manager
5. Use the dropdown list to search for documents created by one user
6. Use the dropdown list to search for a particular type of document
7. Enter a date range to search for documents created within that date range
8. Enter a date range to search for document that have been emailed within that date range
9. Enter a date range to search for documents that have been posted within that date range
10. Click *Search* to find the documents that fit your search criteria

1. The documents you uploaded will show as a preview on the left. If there is more than one you can click on the arrows to move between documents.
2. Click *Delete* to remove a document you have uploaded
3. Click *Refresh* to refresh and clear the screen
4. Click here to upload documents (see previous screenshot)
5. By default, you will see documents uploaded by all users. Tick this box to narrow the search to just the current user's uploaded documents
6. Today's date will show here by default. This is the date that will be recorded as the document date. You can alter if you want
7. The name and size of the document will show here
8. Click on the search icon to find and allocate the building this document relates to
9. Type some key letters to refine your search and find the building you are looking for
10. Click to highlight and then double click on the building you want



11. If the building you have selected has more than one contribution schedule, use the dropdown list to select the schedule
12. If the document relates to a lot owner within the building you selected, click on the search icon to find the lot owner you want
13. If the document relates to a Supplier, click on the search icon to find the Supplier.
14. Use the dropdown list to select the type of document
15. Type any comments here
16. Click *Download* to download a copy of the document
17. Click *Print* to generate a PDF copy of the document that you can print
18. Click *Save* to save the document to PropertyIQ. You can continue adding all the documents you uploaded in step one and then click *close* when you are finished



PUBLISH TO PORTAL

You can select and publish documents to the portal from the documents screen

1. You can filter the date range by clicking in the boxes to open the calendar and enter a date range
2. To be able to publish to portal you must filter the screen to only show one strata plan
3. Click on the document(s) you want to publish to the Portal by clicking on the boxes in the left
4. The “Publish to Portal” button will now be enabled. Click to send the selected documents to the portal

PropertyIQ Strata

File To Do Processing Billing End of Period Utilities Log Out

Currently Logged In as: admin Role: Super Administrator 0.147.3 10/10/2017

From Date: 10/07/2017 To Date: 1

Documents

Advanced Search + Document Entry

Date	Name	S/Plan	Building Name	Street Name	Lot	Unit	Supplier	Document Type	On Portal
5/10/2017	Financial Report 01-07-2017 to 30-09-2017.pdf	888777	Hornsby Towers	Florence				Financial	✗
5/10/2017	Financial Report 01-07-2017 to 30-09-2017.pdf	888777	Hornsby Towers	Florence				Financial	✗
19/9/2017	Income Tax Report 01-01-2015 to 19-09-2017.pdf	888777	Hornsby Towers	Florence				Income Tax Report	✗
7/9/2017	Hornsby Towers 2017 Proposed Budget Report.pdf	888777	Hornsby Towers	Florence				Budget Report	✗
1/9/2017	Balance Sheet Report.pdf	888777	Hornsby Towers	Florence				Financial	✗
25/8/2017	Debtor Invoice 2017-08-25.pdf	888777	Hornsby Towers	Florence				Financial	✗
17/8/2017	End of Year Reports - 2016-2017.pdf	888777	Hornsby Towers	Florence				Financial	✗
11/8/2017	Lot 1 AGM Minutes Notice - 27/02/2017.pdf	888777	Hornsby Towers	Florence	1	1		Meeting Minutes	✗
11/8/2017	Lot 2 AGM Minutes Notice - 27/02/2017.pdf	888777	Hornsby Towers	Florence	2	2		Meeting Minutes	✗
11/8/2017	Lot 3 AGM Minutes Notice - 27/02/2017.pdf	888777	Hornsby Towers	Florence	3	3		Meeting Minutes	✗
11/8/2017	Lot 4 AGM Minutes Notice - 27/02/2017.pdf	888777	Hornsby Towers	Florence	4	4		Meeting Minutes	✗
11/8/2017	Lot 5 AGM Minutes Notice - 27/02/2017.pdf	888777	Hornsby Towers	Florence	5	5		Meeting Minutes	✗
11/8/2017	Lot 6 AGM Minutes Notice - 27/02/2017.pdf	888777	Hornsby Towers	Florence	6	6		Meeting Minutes	✗
11/8/2017	Lot 7 AGM Minutes Notice - 27/02/2017.pdf	888777	Hornsby Towers	Florence	7	7		Meeting Minutes	✗
11/8/2017	Lot 8 AGM Minutes Notice - 27/02/2017.pdf	888777	Hornsby Towers	Florence	8	8		Meeting Minutes	✗
11/8/2017	Lot 9 AGM Minutes Notice - 27/02/2017.pdf	888777	Hornsby Towers	Florence	9	9		Meeting Minutes	✗
11/8/2017	Lot 10 AGM Minutes Notice - 27/02/2017.pdf	888777	Hornsby Towers	Florence	10	10		Meeting Minutes	✗
11/8/2017	Lot 11 AGM Minutes Notice - 27/02/2017.pdf	888777	Hornsby Towers	Florence	11	11		Meeting Minutes	✗

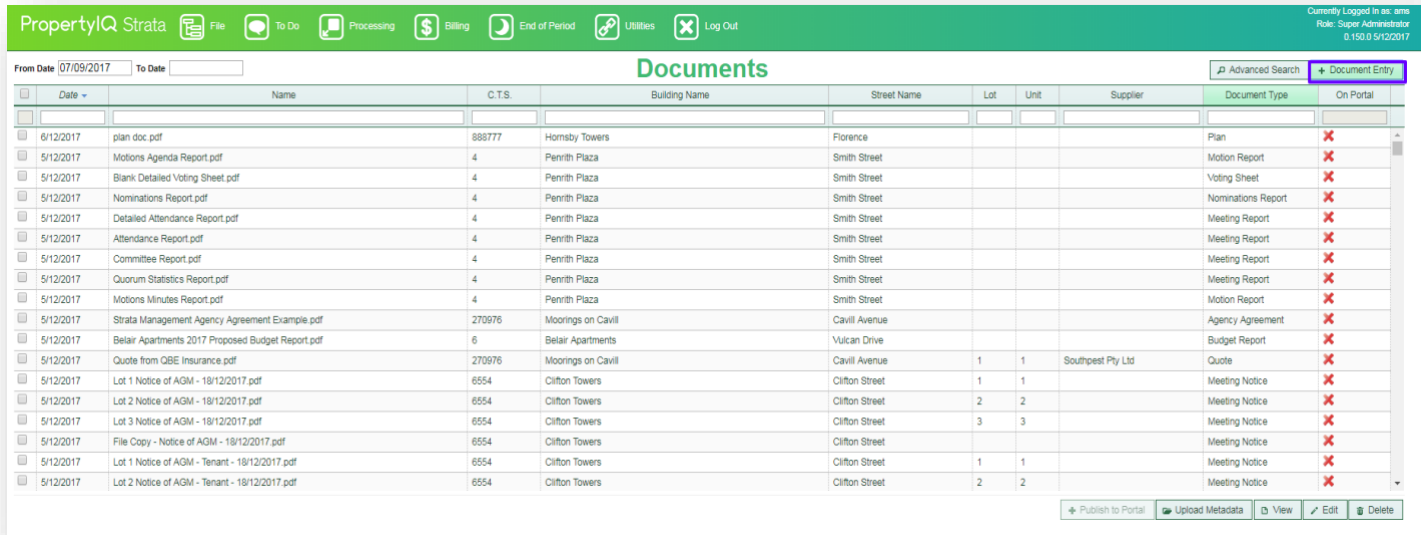
The documents you selected will now be queued for the next overnight portal sync, but you can force a manual sync if you want them to appear on the portal immediately.

For full instructions on the portal, see the manual, “Owner’s Portal”

UPLOAD METADATA FOR DOCUMENT FIELDS

To Save time when importing large numbers of documents, you can import metadata, that contains all the field names for each document to save on document data entry.

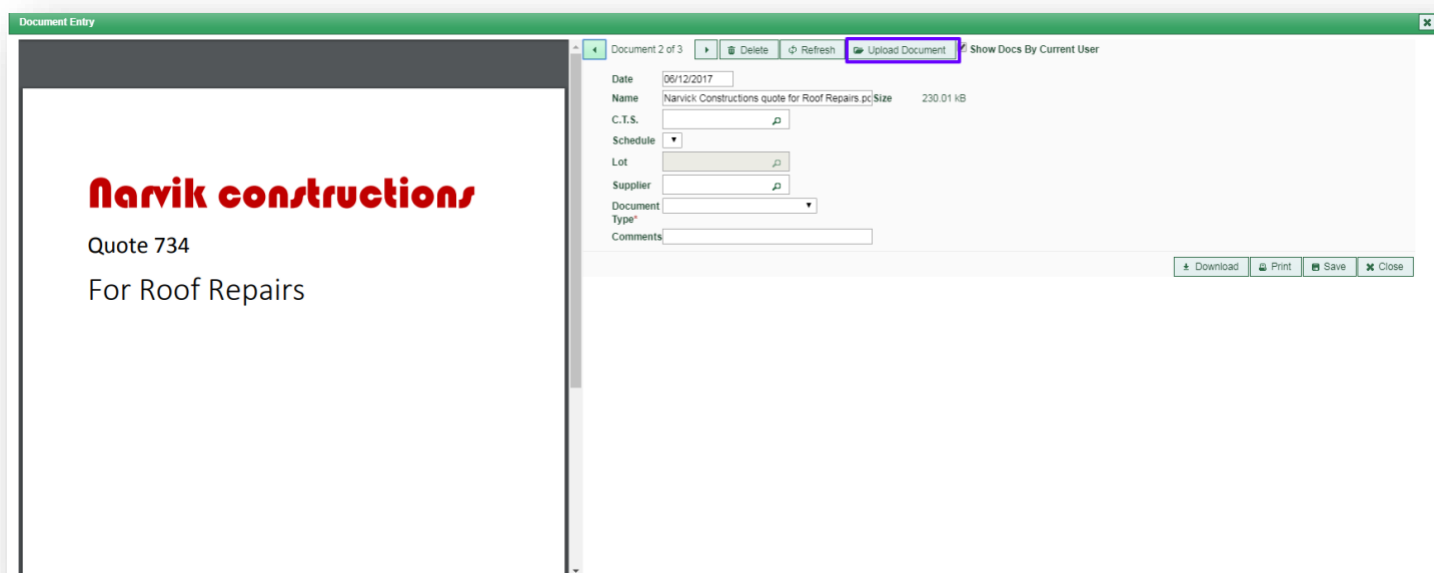
First you need to upload the files via +Document Entry



Date	Name	C.T.S.	Building Name	Street Name	Lot	Unit	Supplier	Document Type	On Portal
6/12/2017	plan doc.pdf	888777	Hornaby Towers	Florence				Plan	✗
5/12/2017	Motions Agenda Report.pdf	4	Pennith Plaza	Smith Street				Motion Report	✗
5/12/2017	Blank Detailed Voting Sheet.pdf	4	Pennith Plaza	Smith Street				Voting Sheet	✗
5/12/2017	Nominations Report.pdf	4	Pennith Plaza	Smith Street				Nominations Report	✗
5/12/2017	Detailed Attendance Report.pdf	4	Pennith Plaza	Smith Street				Meeting Report	✗
5/12/2017	Attendance Report.pdf	4	Pennith Plaza	Smith Street				Meeting Report	✗
5/12/2017	Committee Report.pdf	4	Pennith Plaza	Smith Street				Meeting Report	✗
5/12/2017	Quorum Statistics Report.pdf	4	Pennith Plaza	Smith Street				Meeting Report	✗
5/12/2017	Motions Minutes Report.pdf	4	Pennith Plaza	Smith Street				Motion Report	✗
5/12/2017	Strata Management Agency Agreement Example.pdf	270976	Moorings on Cavill	Cavill Avenue				Agency Agreement	✗
5/12/2017	Belair Apartments 2017 Proposed Budget Report.pdf	6	Belair Apartments	Vulcan Drive				Budget Report	✗
5/12/2017	Quote from QBE Insurance.pdf	270976	Moorings on Cavill	Cavill Avenue	1	1	Southpey Pty Ltd	Quote	✗
5/12/2017	Lot 1 Notice of AGM - 18/12/2017.pdf	6554	Clifton Towers	Clifton Street	1	1		Meeting Notice	✗
5/12/2017	Lot 2 Notice of AGM - 18/12/2017.pdf	6554	Clifton Towers	Clifton Street	2	2		Meeting Notice	✗
5/12/2017	Lot 3 Notice of AGM - 18/12/2017.pdf	6554	Clifton Towers	Clifton Street	3	3		Meeting Notice	✗
5/12/2017	File Copy - Notice of AGM - 18/12/2017.pdf	6554	Clifton Towers	Clifton Street				Meeting Notice	✗
5/12/2017	Lot 1 Notice of AGM - Tenant - 18/12/2017.pdf	6554	Clifton Towers	Clifton Street	1	1		Meeting Notice	✗
5/12/2017	Lot 2 Notice of AGM - Tenant - 18/12/2017.pdf	6554	Clifton Towers	Clifton Street	2	2		Meeting Notice	✗

Find and select the files you want to import

1. Click on the upload document button



Document Entry

Document 2 of 3 | Delete | Refresh | Upload Document | Show Docs By Current User

Date: 06/12/2017

Name: Narvik Constructions quote for Roof Repairs.pc | Size: 230.01 KB

C.T.S.: [Field]

Schedule: [Dropdown]

Lot: [Field]

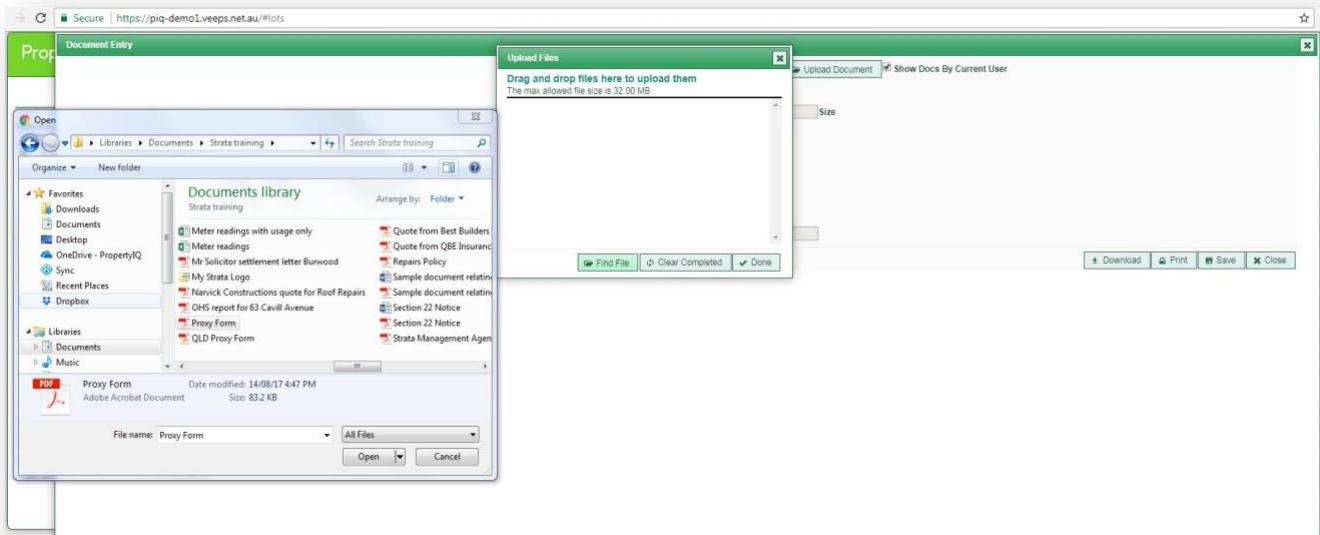
Supplier: [Field]

Document Type: [Dropdown]

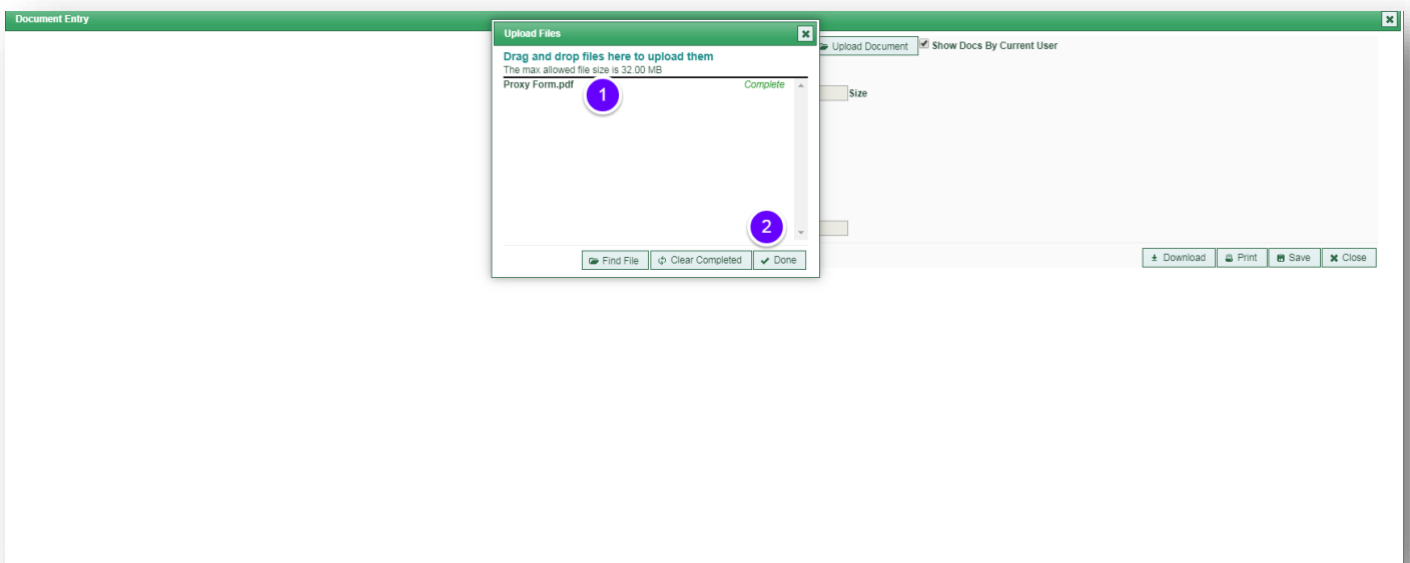
Comments: [Text Area]

[Download] [Print] [Save] [Close]

Find the files you want. (hold your control key down and click on each item you want to select)



1. You will see the documents you have selected here
2. Click Done once you have gathered all the documents you want to upload.



Click Close

Document Entry

Document 1 of 2 | Delete | Refresh | Upload Document | Show Docs By Current User

Date: 06/12/2017
 Name: QLD Proxy Form.pdf | Size: 83.21 kB
 C.T.S.:
 Schedule:
 Lot:
 Supplier:
 Document Type:
 Comments:

Download | Print | Save | Close

BCCM Form 6
 Queensland Government
 Proxy form for body corporate general meetings
 Body Corporate and Community Management Act 1997
 This form is effective from 29 August 2015
 ABRN: 13 846 673 994
 Department of Justice and Attorney General

Section 1—Body corporate secretary details

Name:
 Address of scheme:
 Suburb: State: Postcode:

Section 2—Authorisation

The Regulations set out a number of restrictions on the use of proxies, including an ability for the body corporate to further restrict their use including prohibition.

Note:
 If there is insufficient space please attach separate sheets.

Name of owner 1:
 Signature: Dated:
 Name of owner 2:
 Signature: Dated:
 Lot number/s: Plan number:
 Name of scheme:
 CMS number:
 Appoint (full name):
 as my/our proxy to vote on my/our behalf (including adjournments) at (please tick **yes**)

Now you can upload the metadata.

Go to the File>Documents Menu and click *Upload Metadata*

PropertyIQ Strata | File | To Do | Processing | Billing | End of Period | Utilities | Log Out

Currently Logged in as: **ams**
 Role: Super Administrator
 8:14:42 26/11/2017

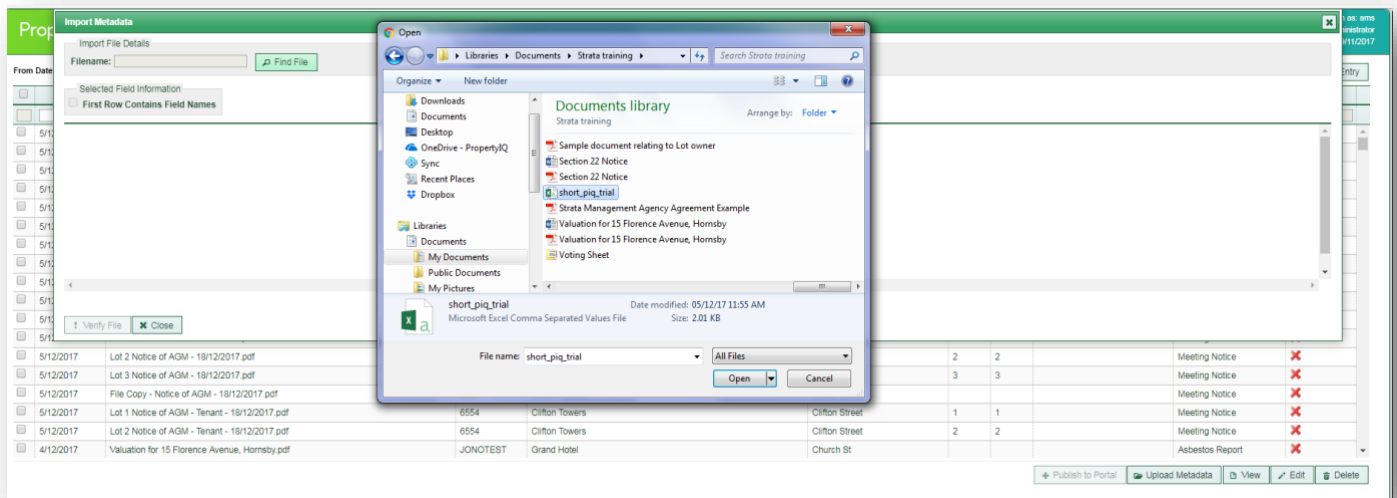
From Date: 05/09/2017 | To Date:

Documents | Advanced Search | Document Entry

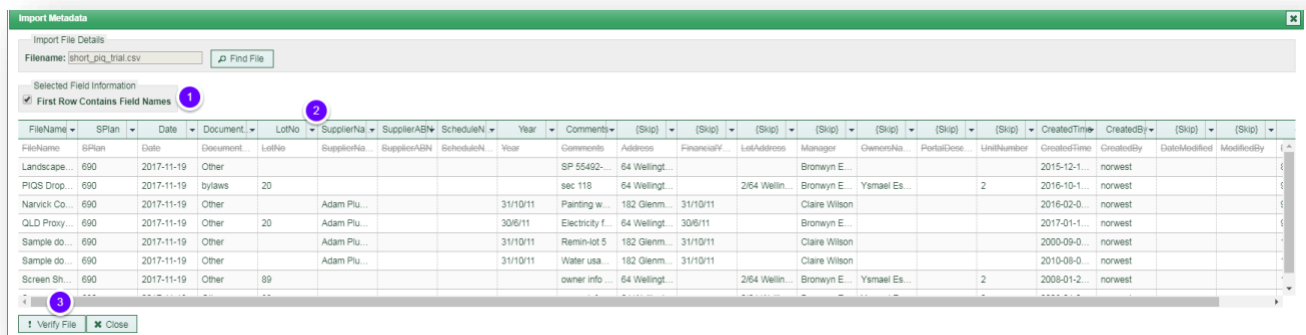
Date	Name	C.T.S.	Building Name	Street Name	Lot	Unit	Supplier	Document Type	On Portal
5/12/2017	Motions Agenda Report.pdf	4	Penrith Plaza	Smith Street				Motion Report	✗
5/12/2017	Blank Detailed Voting Sheet.pdf	4	Penrith Plaza	Smith Street				Voting Sheet	✗
5/12/2017	Nominations Report.pdf	4	Penrith Plaza	Smith Street				Nominations Report	✗
5/12/2017	Detailed Attendance Report.pdf	4	Penrith Plaza	Smith Street				Meeting Report	✗
5/12/2017	Attendance Report.pdf	4	Penrith Plaza	Smith Street				Meeting Report	✗
5/12/2017	Committee Report.pdf	4	Penrith Plaza	Smith Street				Meeting Report	✗
5/12/2017	Quorum Statistics Report.pdf	4	Penrith Plaza	Smith Street				Meeting Report	✗
5/12/2017	Motions Minutes Report.pdf	4	Penrith Plaza	Smith Street				Motion Report	✗
5/12/2017	Strata Management Agency Agreement Example.pdf	270976	Moorings on Cavill	Cavill Avenue				Agency Agreement	✗
5/12/2017	Belair Apartments 2017 Proposed Budget Report.pdf	6	Belair Apartments	Vulcan Drive				Budget Report	✗
5/12/2017	Quote from QBE Insurance.pdf	270976	Moorings on Cavill	Cavill Avenue	1	1	Southpest Pty Ltd	Quote	✗
5/12/2017	Lot 1 Notice of AGM - 18/12/2017.pdf	6554	Clifton Towers	Clifton Street	1	1		Meeting Notice	✗
5/12/2017	Lot 2 Notice of AGM - 18/12/2017.pdf	6554	Clifton Towers	Clifton Street	2	2		Meeting Notice	✗
5/12/2017	Lot 3 Notice of AGM - 18/12/2017.pdf	6554	Clifton Towers	Clifton Street	3	3		Meeting Notice	✗
5/12/2017	File Copy - Notice of AGM - 18/12/2017.pdf	6554	Clifton Towers	Clifton Street				Meeting Notice	✗
5/12/2017	Lot 1 Notice of AGM - Tenant - 18/12/2017.pdf	6554	Clifton Towers	Clifton Street	1	1		Meeting Notice	✗
5/12/2017	Lot 2 Notice of AGM - Tenant - 18/12/2017.pdf	6554	Clifton Towers	Clifton Street	2	2		Meeting Notice	✗
4/12/2017	Valuation for 15 Florence Avenue, Hornsby.pdf	JONOTEST	Grand Hotel	Church St				Asbestos Report	✗

Publish to Portal | Upload Metadata | View | Edit | Delete

Click on *Find file* to search for the file on your computer



1. If the first row of your spreadsheet contains the field names, tick “First row contains Field Names” so that PropertyIQ will ignore the data in the first row.
2. PropertyIQ will now look for a field that matches the field names in your spreadsheet. If your field name is different, click on the dropdown list to select a corresponding field heading on the program.
3. Click on *Verify File*



1. If the data matches a file you have uploaded in the steps above, they will show here as valid. Note that the name of the document must be identical to the document name on your spreadsheet.
2. Any incomplete data will show in this area
3. Data that can't be imported shows here – this could be because you haven't uploaded a document with the same name of that shows on your spreadsheet or that other information is incorrect.
4. You can tick here to leave incomplete items as pending, so that you can go back and amend later
5. Click to import the metadata.

Import Metadata

Import File Details

Filename: short_pio_trial.csv

Selected Field Information

☒ First Row Contains Field Names

FileName

SPlan

Date

6/1/

5/1/

5/1/

5/1/

5/1/

5/1/

5/1/

5/1/

5/1/

5/1/

5/1/

5/1/

5/1/

5/1/

5/1/

5/1/

5/1/

5/1/

5/1/

5/1/

5/1/

Verify File

Close

5/12/2017

Lot 1 Notice of AGM - 18/12/2017

5/12/2017

Lot 2 Notice of AGM - 18/12/2017

5/12/2017

Lot 3 Notice of AGM - 18/12/2017

5/12/2017

File Copy - Notice of AGM - 18/12/2017

5/12/2017

Lot 1 Notice of AGM - Tenant - 18/12/2017

5/12/2017

Lot 2 Notice of AGM - Tenant - 18/12/2017

Verify Metadata

Total rows in file: 3

Valid Metadata - 2 rows

FileName	SPlan	Date	DocumentType	LotNo	SupplierName	SupplierABN	ScheduleName	Year	Comments	CreatedBy/Na...	CreatedTime
Narvik Cons...	690	2017-11-19	Other		Adam Plumber			0011	Painting walls	norwest	2016-02-01 0...
QLD Proxy F...	690	2017-11-19	Other	20	Adam Plumber			0011	Electricity for ...	norwest	2017-01-11 0...

Incomplete Metadata - 0 rows

Invalid Metadata - 6 rows

FileName	SPlan	Date	DocumentType	LotNo	SupplierName	SupplierABN	ScheduleName	Year	Comments	CreatedBy/Na...	CreatedTime
Landscape Plan	690	2017-11-19	Other						SP 55492- U...	norwest	2015-12-12 0...
PIOS Drop Test	690	2017-11-19	bylaws	20					sec 118	norwest	2016-10-10 0...
Sample docum...	690	2017-11-19	Other		Adam Plumber			0011	Remin-lot 5	norwest	2000-09-01 0...
Sample docum...	690	2017-11-19	Other		Adam Plumber			0011	Water usage	norwest	2010-09-07 0...
Screen Shot 20...	690	2017-11-19	Other	89					owner info up...	norwest	2008-01-23 0...
Screen Shot 20...	690	2017-11-19	Other	89					owner info up...	norwest	2008-01-23 0...

☒ Leave incomplete documents as pending ?

Import Valid & Incomplete Metadata

Upload Metadata

View

Edit

Delete

You will receive a confirmation that the data is being imported

Click OK to proceed and complete the process.

!

2 valid records imported

0 incomplete records imported

6 invalid records not imported

Ok

The documents you selected have now been fully imported without the need to enter details manually for each document.

PropertyIQ
Documents
13.09.2019
12