

PropertyIQ™

PIQ+ Meetings

Libraries - Meetings Templates

Quick Reference Guide

Version 1. August 2023





Description

- This is a Quick Reference Guide for PIQ+ Meetings: **Libraries - Meetings Templates**.
- Meetings templates are created and stored in a central location called the Meetings Templates library.
- A meeting template is used when creating a new meeting. All the pre-defined data from the meeting template will be copied into the new meeting, saving time and providing consistency in document design and formatting.
- Within a meeting template you can add motions, create notice and minutes document templates with merge fields, and link email templates.



What you'll learn

This guide will assist you to navigate the following:

- [View meeting templates](#)
- [Create a new meeting template](#)
- [Add motions to a meeting template](#)
- [Add and preview a notice in a meeting template](#)
- [Edit a notice in a meeting template](#)
- [Add and preview minutes in a meeting template](#)
- [Edit minutes in a meeting template](#)

Additional information included:

- [Important system behaviour](#)
- [Permissions](#)



Who should read this

- Users responsible for Meeting Template creation and maintenance
- Strata Managers
- Administrators



Read time

11 minutes

How to view Meetings Templates

1 Select **Libraries** from the left hand navigation menu.

2 Select the **Meeting Template** tab.

3 A list of Meetings Templates will be shown. Select any meeting template in the list to open, view and edit.

4 Sort the list of meeting templates by selecting any of the column headings.

5 Select the **Action Menu** to archive a meeting template.

6 Select the **Include Archived** toggle to view archived meeting templates in the list.

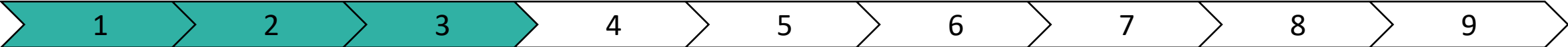
7 Select the **+Create meeting template** to create a new meeting template.

The screenshot shows the PropertyIQ web application interface. At the top right, the user is logged in as 'Jacqueline' with a 'PIQ' icon and a 'Log out' button. The main navigation bar includes 'MOTIONS', 'EMAIL TEMPLATES', and 'MEETING TEMPLATES' (highlighted with a red box and callout 2). The left-hand navigation menu has 'Meetings' and 'Libraries' (highlighted with a red box and callout 1). The 'MEETING TEMPLATES' page displays a table of 8 items. The table has columns for 'Description', 'Folio', 'Meeting type', and 'Last updated'. The first row is 'Annual General Meeting - Large Scheme'. The 'Include archived' toggle is currently off (callout 6). A '+ Create meeting template' button is in the top right (callout 7). Each row in the table has a vertical ellipsis action menu (callout 5). A 'Settings' icon is at the bottom left.

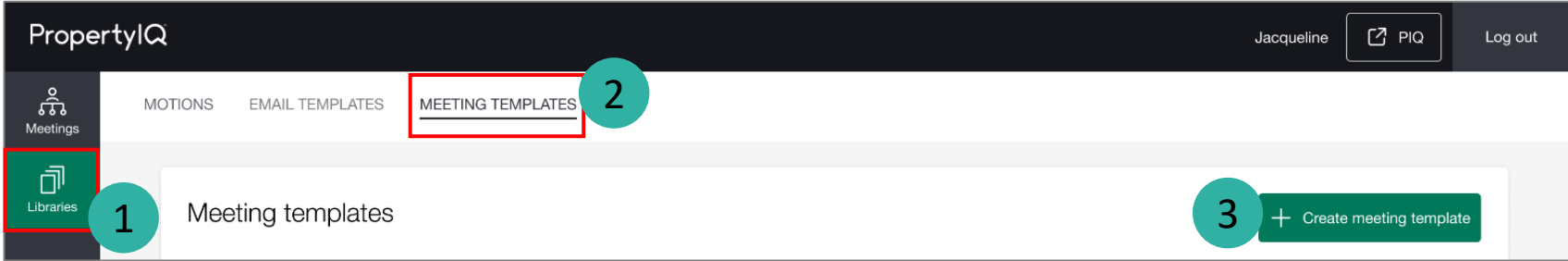
Description	Folio	Meeting type	Last updated
Annual General Meeting - Large Scheme	Global	AGM	08/05/23 by Jacqueline Reid
Annual General Meeting - Small Scheme	Global	AGM	08/05/23 by Jacqueline Reid
Committee meeting - generic	Global	Committee	08/05/23 by Jacqueline Reid
Committee meeting - pet approval	Global	Committee	08/05/23 by Jacqueline Reid
Extraordinary General Meeting - generic	Global	General	08/05/23 by Jacqueline Reid
Extraordinary General Meeting - special levy	Global	General	08/05/23 by Jacqueline Reid
Inaugural AGM	Global	Inaugural	08/05/23 by Jacqueline Reid
VOCM	Global	VOCM	08/05/23 by Jacqueline Reid

How to create Meetings Templates

There are 9 steps to creating a Meetings Template. Below are steps 1-3.



- 1** Select the **Libraries** from the left-hand navigation menu.
- 2** Select the **Meetings Templates** tab.
- 3** Select the **+Create meeting template** to create a new meeting template.



There are 9 steps to creating a Meetings Template. Below are steps 4-9.



- 4** Select the **Meeting Type**. The options are: AGM, Committee, General and VOCM.
Note: You cannot change this once the template is created.
- 5** Select whether this meeting template is used globally or for a specific folio. This dropdown will display 'Global' and a list of all folios in your PropertyIQ.
Note: You cannot change this once the template is created.
- 6** Enter an optional internal description.
- 7** Select an email template that will be used for distribution of the meeting **notice**.
Note: This list will only display email templates applicable to the Email type (notice), Meeting type and Folio selected in Steps 4 & 5.
- 8** Select an email template that will be used for distribution of the meeting **minutes**.
Note: This list will only display email templates applicable to the Email type (minutes), Meeting type and Folio selected in Steps 4 & 5.
- 9** Select **Create** to save the meeting template.

How to add motions to a Meeting Template


Once the meeting template is created, you can add, reorder, remove and create motions all from the Motions tab.

1 Select the **Motions** tab.

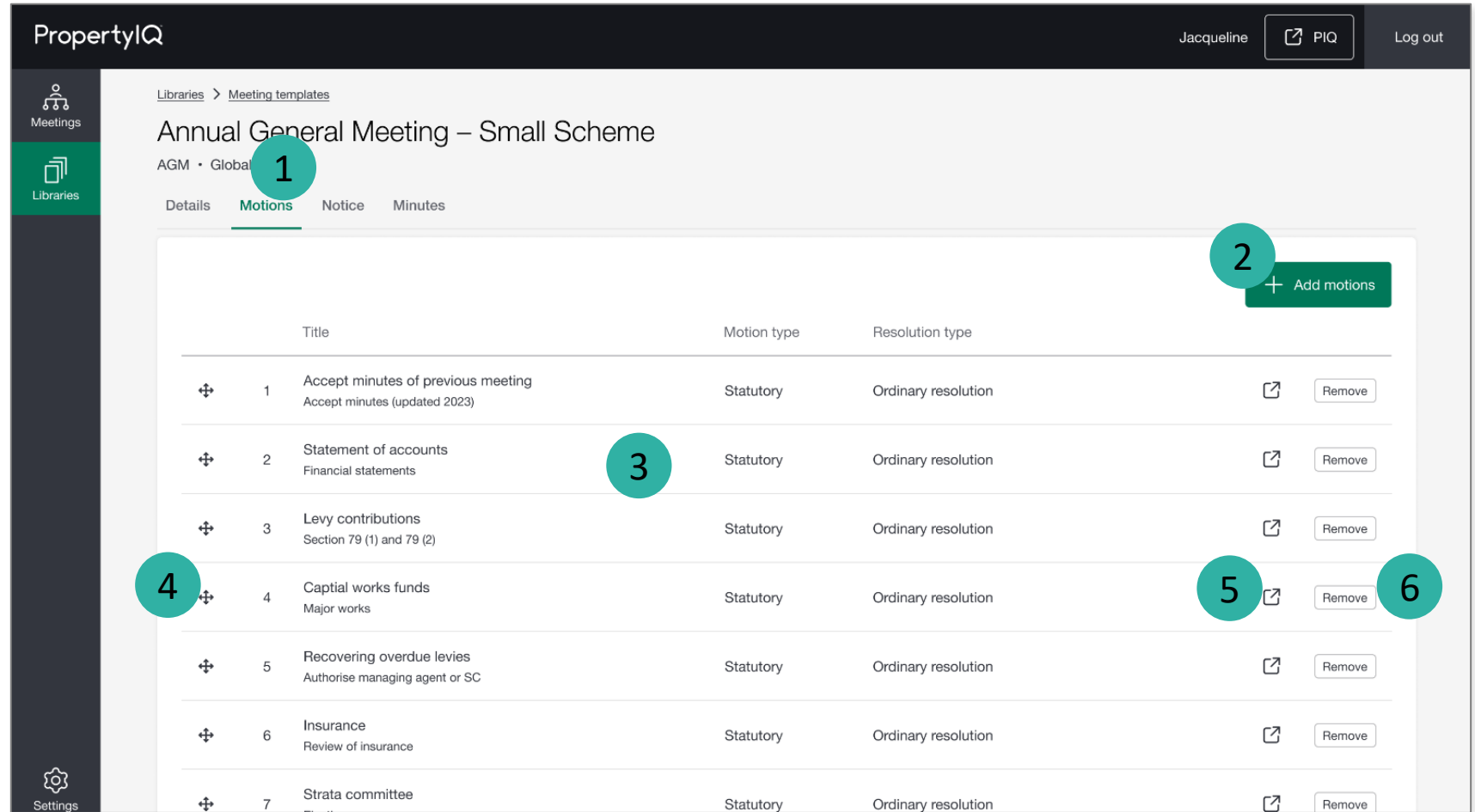
2 Select **+Add motions**, to add motions to your meeting template from the global Motions library.

3 Any motions you add to your template will display in the list.


4 Reorder the motions by selecting and dragging the motion to the desired position in the list.
Note: The motions will display in the same order in a meeting as they do here in the template.

5 Select  to **Preview** a motion. This will open in a new tab.

6 Select **Remove** to remove a motion.



PropertyIQ

Jacqueline  Log out








Libraries > Meeting templates

Annual General Meeting – Small Scheme

AGM • Global

Details **Motions** Notice Minutes

2 + Add motions

	Title	Motion type	Resolution type		
1	1 Accept minutes of previous meeting Accept minutes (updated 2023)	Statutory	Ordinary resolution		Remove
3	2 Statement of accounts Financial statements	Statutory	Ordinary resolution		Remove
4	3 Levy contributions Section 79 (1) and 79 (2)	Statutory	Ordinary resolution		Remove
5	4 Capital works funds Major works	Statutory	Ordinary resolution		Remove 6
	5 Recovering overdue levies Authorise managing agent or SC	Statutory	Ordinary resolution		Remove
	6 Insurance Review of insurance	Statutory	Ordinary resolution		Remove
	7 Strata committee	Statutory	Ordinary resolution		Remove

Settings

1 Select the **Notice** tab.

2 On the **Document** sub-tab you can create, edit and preview your notice document.

3 On the **Distribution** sub-tab you can preview the email template that is already linked to the notice for distribution, and also change/edit the template if required.

4 Select **Edit** to create and edit content for your meeting notice.
Note: See Slide 8 for more information.

5 **Preview** the notice document live on screen here.

6 Select the **PDF/Print** icon to preview the notice document as a PDF/Print output.

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Jacqueline Log out

Libraries > Meeting templates

Annual General Meeting – Small Scheme

AGM • Global

Details Motions **Notice** Minutes

Document Distribution

Notice of Annual General Meeting

Owners Corporations Act 2006 Section 72, Owners Corporations Regulations 2018 and Owners Corporation Rules. This Notice must be given to each Lot Owner 14 days before the meeting.

For OWNERS CORPORATION PLAN OF SUBDIVISION: {{Strata plan number}} - {{Building name}} ,
{{Building street number}} {{Building street name}} , {{Building suburb}} {{Building state}} {{Building postcode}}

The Annual General Meeting for the Owners Corporation will be held:

Date	Time	Venue	Join online
{{Meeting date (long)}}	{{Meeting time}}	{{Meeting venue name}} {{Meeting venue address}}, {{Meeting venue suburb}} {{Meeting venue postcode}}	{{Teleconference information}}

Agenda

1

Use the editor toolbar to apply formatting and styles, insert tables, images or hyperlinks.

2

Add the content to your meeting notice.

3

Add **Merge fields** to your text using the merge field library. You can search, drag/drop or select and insert any fields that may be required.

4

Select **Save** to save your changes to the meeting notice.



TIP: Make sure you use the merge field **{{Motions for agenda}}** to merge your motions into the meeting notice document.

This merge field block will include all motions from your meeting template AND any adhoc motions added in a meeting.

The screenshot shows the PropertyIQ editor interface. At the top, the user is logged in as 'Jacqueline' and can click 'PIQ' or 'Log out'. The breadcrumb trail is 'Libraries > Meeting templates > Annual General Meeting - Small Scheme > Notice > Document'. The editor toolbar (1) is visible at the top of the document area. The main content area (2) displays a 'Notice of Annual General Meeting' with various merge fields highlighted in blue, such as {{Strata plan number}}, {{Building name}}, and a table with columns for Date, Time, Venue, and Join online. Below the table is an 'Agenda' section with a merge field {{Motions for agenda}}. On the right, the 'Merge fields' library (3) is open, showing a search bar and a list of fields including Building ABN, Building address 2, Building name, Building plan QLD, Building postcode, Building state, Building street name, Building street number, Building type, Company, Community, Neighbourhood, and Current financial year. The 'Save' button (4) is highlighted in green at the bottom right of the editor.

1 Select the **Minutes** tab.

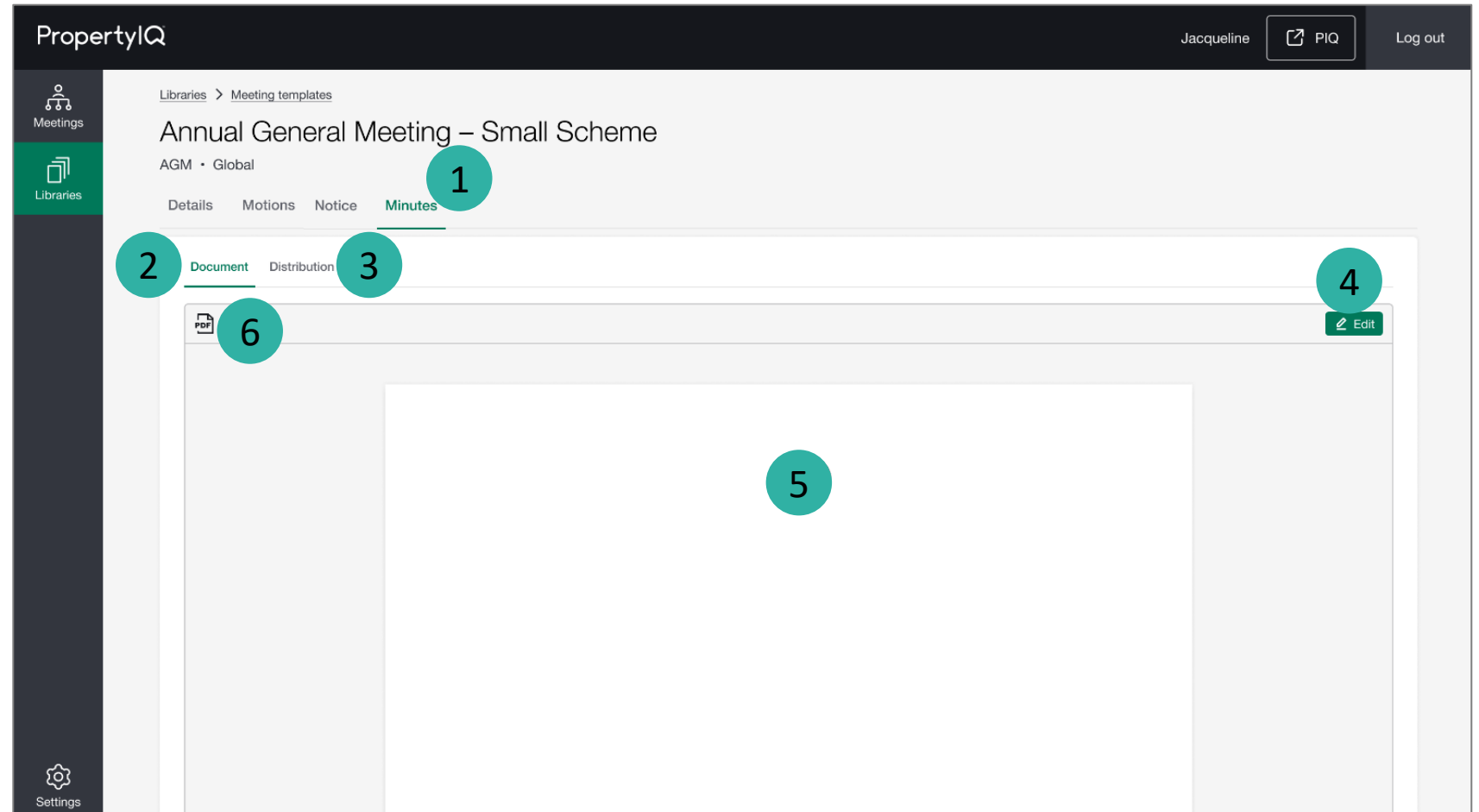
2 On the **Documents** sub-tab you can create, edit and preview your minutes document.

3 On the **Distribution** sub-tab you can preview the email template that is already linked to the minutes for distribution, and also change/edit the template if required.

4 Select **Edit** to create and edit content for your meeting minutes.
Note: See Steps on the next page for more information.

5 **Preview** the minutes document live on screen here.

6 Select the **PDF/Print** icon to preview the minutes document as a PDF/Print output.



1 Use the **editor toolbar** to apply formatting and styles, insert tables, images or hyperlinks.

2 Add the content to your meeting minutes.

3 Add merge fields to your text using the **merge field library**. You can search, drag/drop or select and insert any fields that may be required.

4 Select **Save** to save your changes to the meeting minutes.



TIP: Make sure you use the merge field **{{Motions for minutes}}** to merge your motions into the meeting minutes document.

This merge field block will include all motions from your meeting template AND any adhoc motions added in a meeting.

The screenshot displays the PropertyIQ web interface for editing meeting minutes. At the top, the user 'Jacqueline' is logged in, with a 'PIQ' button and a 'Log out' option. The breadcrumb navigation shows the path: 'Libraries > Meeting templates > Annual General Meeting - Small Scheme > Minutes > Document'. The editor toolbar (1) contains various formatting and insertion tools. The main text area (2) is currently empty. The 'Merge fields' library (3) on the right lists several fields for selection, including 'Building ABN', 'Building address 2', 'Building name', 'Building plan QLD', 'Building postcode', 'Building state', 'Building street name', 'Building street number', and 'Building Type'. A tooltip is visible over the 'Building Type' field, providing additional information: 'Building Type. See Building / Building type e.g. Strata, Company, Community, Neighbourhood'. The 'Save' button (4) is highlighted in green at the bottom right of the editor.

General

- You must create the following email templates **before** you can create any meeting templates:
 - 1x email template of type 'meeting notice' and assigned to 'Global' folio
 - 1x email template of type 'meeting minutes' and assigned to 'Global' folio
- The Meeting Type and Folio fields of a meeting template cannot be changed once the template is created.

Motions

- When adding motions to the meeting template, the motions list will only show you motions that have the same meeting type and folio as the meeting template you're creating. For example, for a meeting template 'Meeting type = AGM', only motions with 'Applies to = AGM' will be displayed in the list.

Merge fields

- You cannot add or change merge fields within a notice or minutes document within a meeting (the merge field list is not available). Merge fields can only add/remove from a meeting template under Libraries>Meeting Templates.
- You cannot change or overwrite the merge field text in a notice or minutes document within a meeting. However, you'll be able to apply styling and formatting.
- The merge fields called 'Motions for agenda' and 'Motions for minutes' cannot be added into a motion template. They are only available within Meeting Templates for notice and minutes documents.
 - You need to insert the `{{Motions for agenda}}` merge field into the notice document of the meeting template.
 - You need to insert the `{{Motions for minutes}}` merge field into the minutes document of the meeting template.

Access to the meeting templates library will be determined by the user permissions set in PropertyIQ under Utilities>Security menu. If you think you have the wrong permissions, please contact your administrator to update your role permission in PIQ.

View, create, edit and archive meeting templates

Users with: Utilities> Security> Role> File - Meeting Templates	View	View meeting templates and any meeting template in the library in read-only mode.
	Create	Create meeting templates
	Edit and Archive	Edit and archive meeting templates, including details, motions, attachments, notice and minutes content.

User data access restrictions

Users with: Utilities> Security> Role> Data Access Restriction	No Data Access Restriction can work with meeting templates belonging to global and all folios.
	Restrict to Data In Users Folios can only work with meeting templates under global and folios they have access to. For example, if a user has access to Folio A and B, they will only have access to meeting templates belonging to global, Folio A and Folio B.
	Restrict to Data in Buildings Managed by User can only work with meeting templates under global and folios with buildings they have access to. For example, if a user has access to Building A and B of Folio X and Building E of Folio Y, they will only have access to meeting templates belonging to Global, Folio X and Folio Y.



TIP: If your administrator has updated your permissions, you will need to logout and then login again for those permissions to reflect in PIQ+.