PropertyIQ™

PIQ+ Meetings

Libraries - Motions

Quick Reference Guide

Version 1. August 2023

Overview

Description

- This is a Quick Reference Guide for PIQ+ Meetings: **Libraries - Motions**.
- All motions that are created in PIQ+ are stored in a central location called the Motions library.
- Motions are one of the building blocks for creating and conducting meetings. You will add motions to Meeting Templates.
- With the help of merge fields and conditional logic, all motions for a meeting will be grouped into a 'Motions block' merge field. This flows into meeting notices and minutes, saving you time and ensuring consistency in the content of your meetings.

What you'll learn

This guide will assist you to navigate the following:

- View motions in the library
- Create a new motion
- Edit an existing motion
- Duplicate an existing motion
- Archive a motion

Additional information included:

- Important system behaviour
- Permissions

Who should read this

- Users responsible for Motions creation and maintenance
- Strata Managers
- Administrators

Read time

10 minutes

How to view Motions

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

2. Select **Motions** tab.

3. Sort the list of motions by selecting any of the column headings.

4. View all motions in the list. Select any motion in the list to open, view and edit.

5. Select ⋮ **Action Menu** to duplicate or archive a motion.

6. Select **Include Archived** toggle to view archived motions in the list.
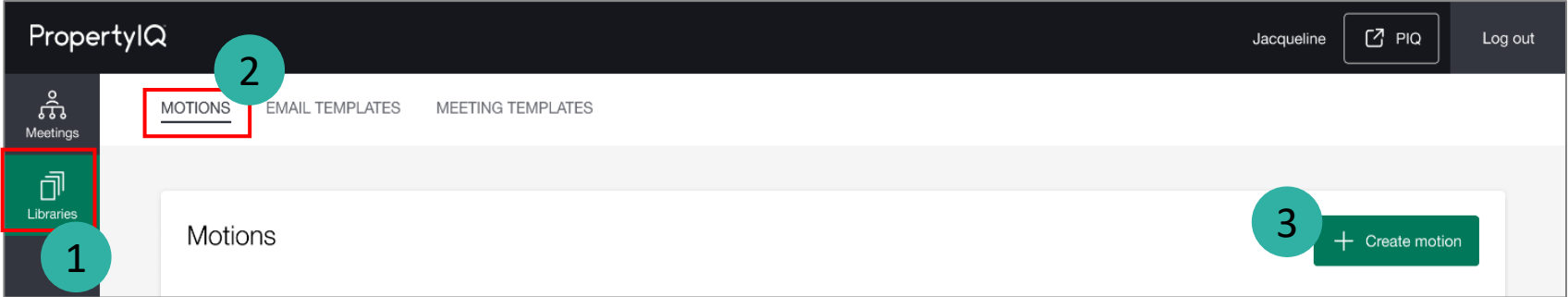
7. Select **+Create motion** to create a new motion.

How to create Motions

There are 15 steps to creating a Motion. Below are steps 1-3.

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 |

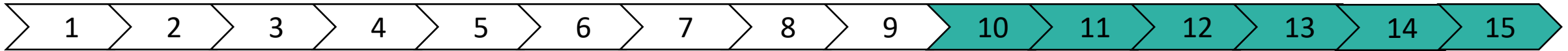|	
1	Select **Libraries** from the left-hand navigation menu.
2	Select **Motions** tab.
3	Select **+Create motion** to create a new motion.

How to create Motions (continued)

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There are 15 steps to creating a Motion. Below are steps 4-9.

1 > 2 > 3 > **4** > **5** > **6** > **7** > **8** > **9** > 10 > 11 > 12 > 13 > 14 > 15

4 Enter motion **Title**. This appears on agenda and minutes.

5 Enter optional internal **Description**.

6 Select **Folio** to determine if motion is for global or specific folio use. Menu options are **Global** and a list of all folios in your PropertyIQ.

Note: You cannot change this once the motion is created.

7 Select **Motion Type**. Menu options are Statutory, Owner and Committee.

8 Select **Resolution type** that's applicable.

Note: This displays a list of available types across all States.

9 Select **Applies to** for the type(s) of meetings this motion is for. You can select one or multiple. For example, when viewing or creating AGM meetings and meeting templates, you can only see and add motions applicable to an AGM.

Note: You cannot change this once the motion is created.

How to create Motions (continued)

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There are 15 steps to creating a Motion. Below are steps 10-15.

1 > 2 > 3 > 4 > 5 > 6 > 7 > 8 > 9 > 10 > 11 > 12 > 13 > 14 > 15

10 Enter motion description for **Agenda**. You can drag and drop, or click and insert, merge fields from the list on the right.
Use the editor toolbar to apply formatting and styles, insert tables, images or hyperlinks.

11 Enter **Explanatory note** for the motion (optional).

12 Enter **Voting instructions** for the motion (optional).

13 Enter motion description for **Minutes**. You can drag and drop, or click and insert, merge fields from the list on the right.
Use the editor toolbar to apply formatting and styles, insert tables, images or hyperlinks.
  a. You must add a description for each possible motion outcome.
  b. Motion outcomes (e.g. options, naming conventions) are determined by Settings for Motion Results.
     Go to Configure Settings > Motions Results for more information.

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

15 Select **Create** or **Save** to save the motion.
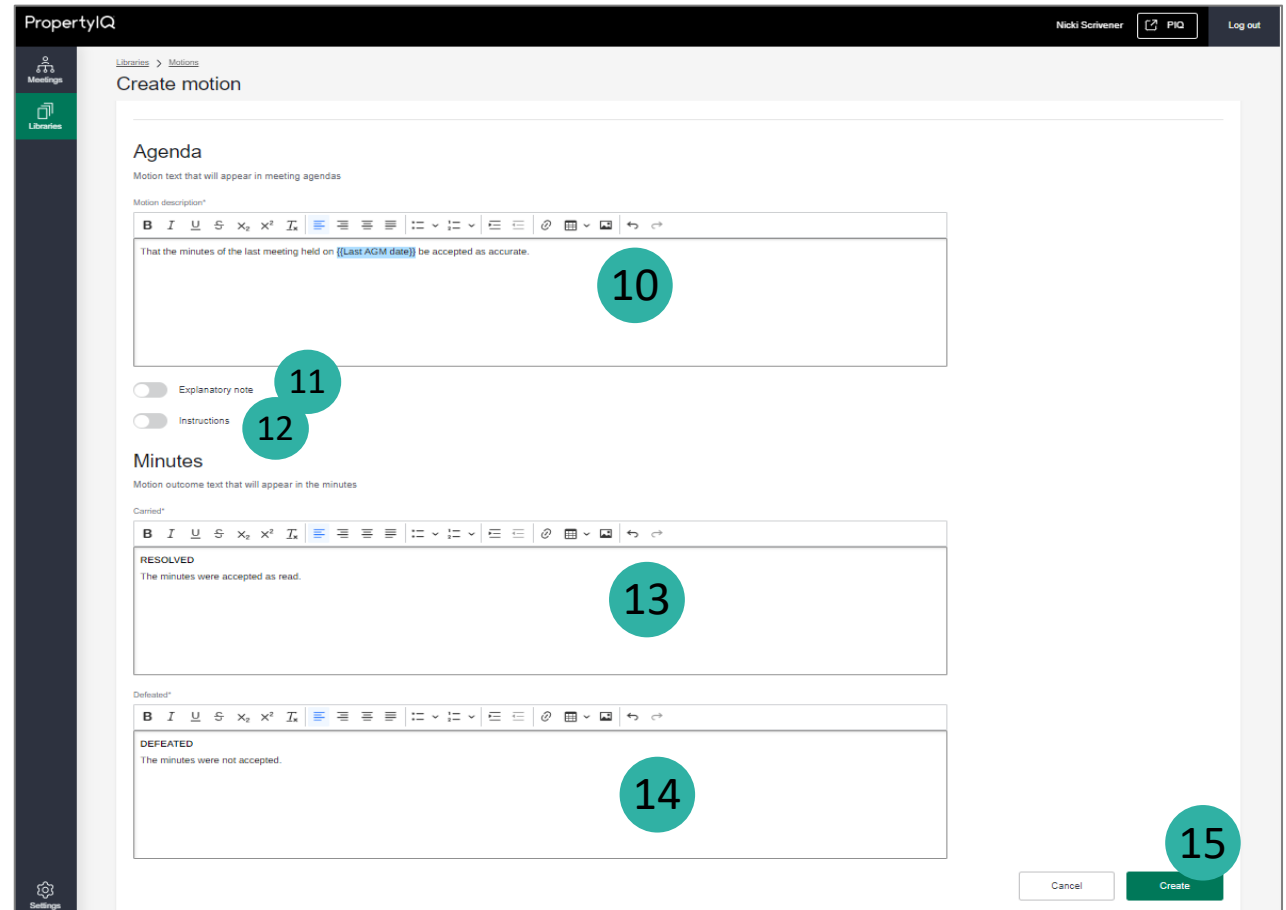
How to edit an existing Motion

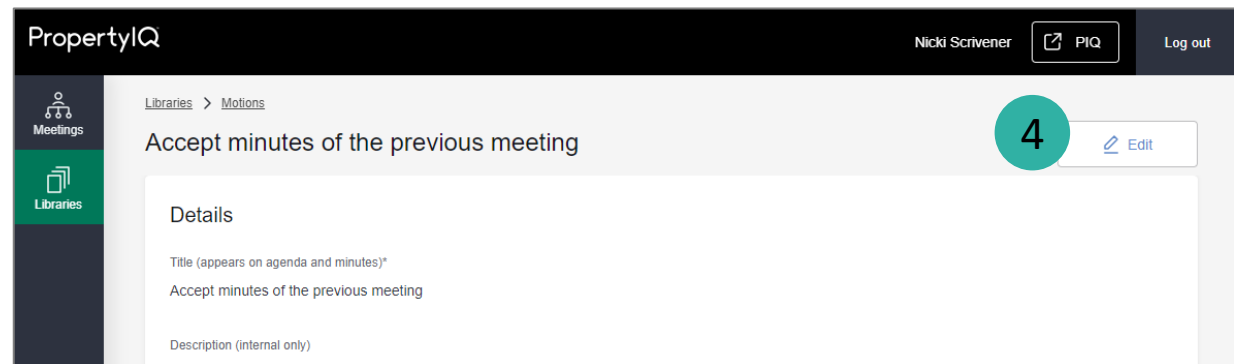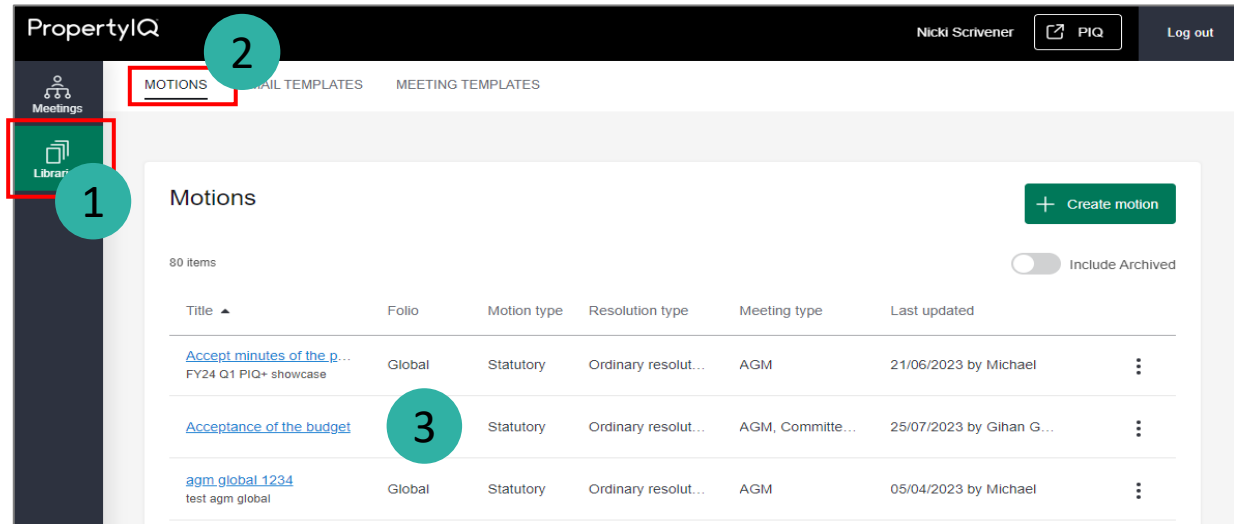There are 6 steps to editing a motion. Below are steps 1-4.

| 1 | 2 | 3 | 4 | 5 | 6 |

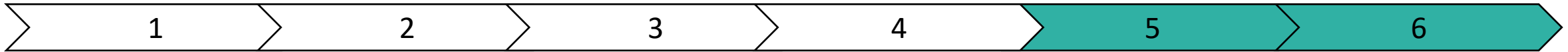**1** Select **Libraries** from the left hand navigation menu.

2 Select **Motions** tab.

3 Select a **Motion** from the list.
You can click anywhere on the row, not including ⋮.

4 Once the motion is open, select **Edit**.

How to edit an existing Motion (continued)

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There are 6 steps to editing a motion. Below are steps 5-6.

| 1 | 2 | 3 | 4 | 5 | 6 |

5 Change the existing content areas.
a. Title*
b. Description (internal only)
c. Motion type*
d. Resolution type*
e. Motion description*
f. Explanatory note
g. Instructions
h. Motion outcomes*
*Fields are mandatory

Note: You cannot change Folio or Applies To fields once the motion is created.

6 Select **Save** to save your changes.

How to duplicate a Motion

Duplicate a motion to quickly create a clone of it. The duplicated motion will contain the same details and content from the original motion (except for Motion title).

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

2 Select **Motions** tab.

3 Select ⋮ of the motion you want to duplicate.

4 Select **Duplicate** in the menu.

5 All the details from your original motion will be displayed. Change the motion details as needed.

6 Select **Create**. You will see a success message at the top of the Motions library, and the new motion will appear in the list.
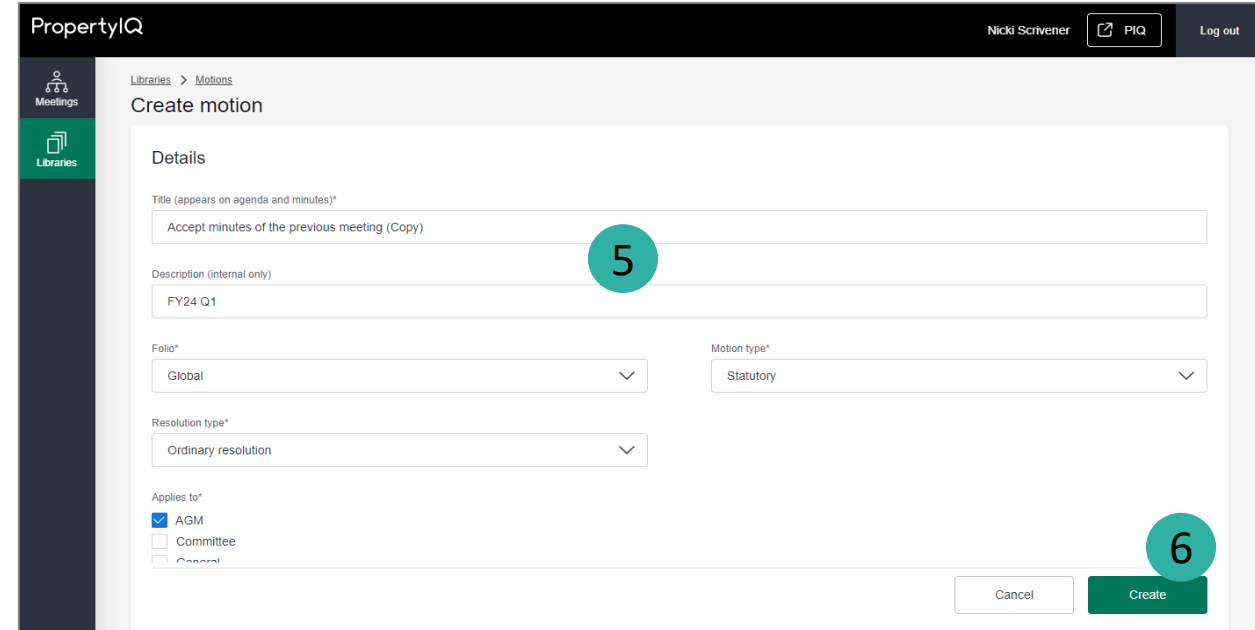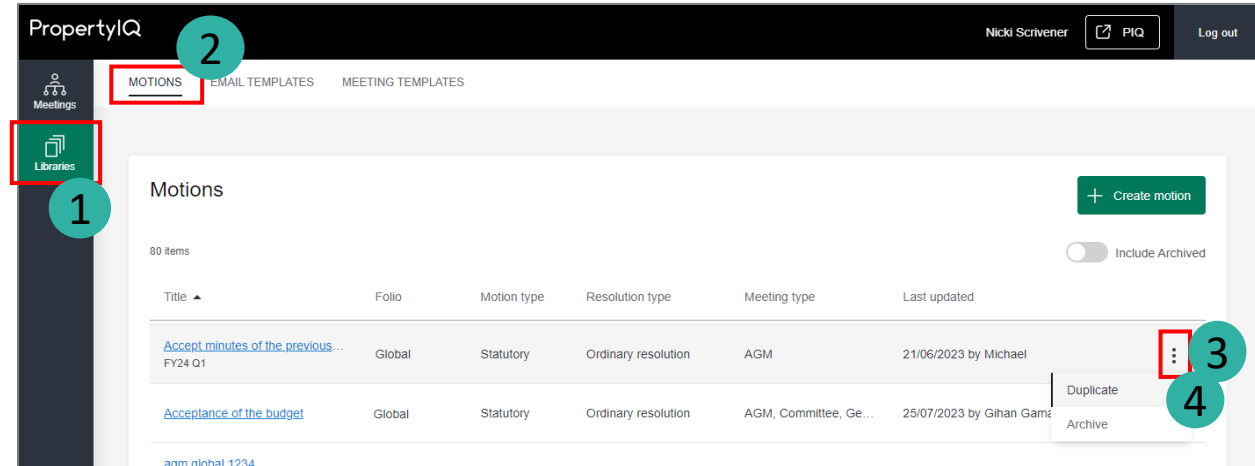
How to archive a Motion

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You can archive a motion that is redundant or obsolete.

1	Select **Libraries** from the left hand navigation menu.
2	Select **Motions** tab.
3	Select ⋮ of the motion you want to archive.
4	Select **Archive** in the menu.

TIPS:

- Archived motions cannot be unarchived.

- Before you archive a motion, check whether it is being used elsewhere. For example, archiving a motion being used in a meeting template, removes it from that linked meeting template. Archiving a motion being used in an active or old meeting, does not remove it from the meeting.

Important system behaviour

Creating

- 'Folio' and 'Applies to' fields cannot be changed once a motion has been created.

Editing

- Any updates to a motion will be reflected in global meeting template/s under *Libraries > Meeting templates* if that motion has been included.
- Any updates to a motion will **not** affect or be reflected in existing meetings under *Meetings page*.

Archiving

- Once a motion is archived, it cannot be unarchived.
- Archived motions cannot be edited.

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Access to the motions 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, duplicate, edit and archive motions

Users with: Utilities> Security> Role> Utilities – Motions Library	**View**	View motions library and any motion in the library in read-only mode.
	Add	Create and duplicate motions.
	Edit	Edit and archive email templates.

User data access restrictions

Users with: Utilities> Security> Role> Data Access Restriction	**No Data Access Restriction** can work with motions belonging to global and all folios.
	Restrict to Data In Users Folios can only work with motions 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 email templates belonging to global, Folio A and Folio B.
	Restrict to Data in Buildings Managed by User can only work with motions 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+.