

# Overview





## Description

- This is a Quick Reference Guide for PIQ+ Meetings: **Meetings Settings**.
- You can customise your settings for Meetings (e.g. Quorum, Motion results, Motion outcomes).
- These settings will be used throughout the meeting workflow, such as when you're creating motions, recording meeting results and creating meeting minutes.



## What you'll learn

This guide will assist you to navigate the following:

- How to choose your initial transition settings during adoption of PIQ+
- How to change Quorum percentage Global
- How to change Quorum percentage Building
- How to change Quorum percentage Meeting
- How to enable Multi-OC meetings (Victorian clients)
- How to customise Motion Results settings



### Who should read this

- Users responsible for setting and updating meeting settings
- Management / Operations
- Administrators



### Read time

10 minutes

### Additional information included:

- Important system behaviour
- Permissions

## How to choose your initial transition settings during adoption of PIQ+



You can flexibly choose how PIQ+ Meetings module is rolled out and adopted in your business by using one of three transition phases. You can also change the transition phase from one to another at any time.

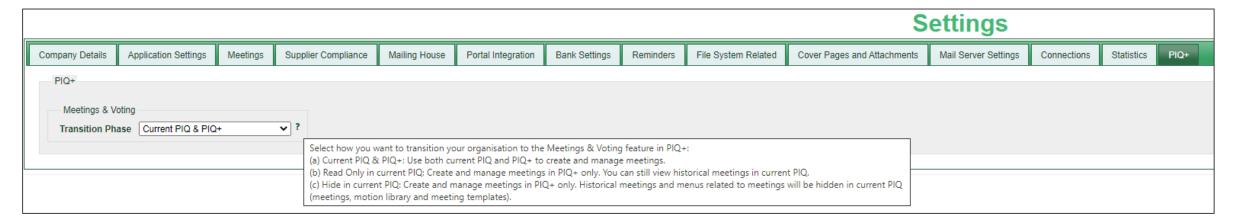
### For example:

- You can trial PIQ+ Meetings for some meetings, while you continue to operate as you currently do in current PIQ for your remaining meetings.
- Or you can make a hard switchover to PIQ+ Meetings, by deactivating the menus and features for the old meetings module in current PIQ.

## There are three options for transition:

- 1. Current PIQ & PIQ+: Create and view meetings in both current PIQ and PIQ+.
- 2. Read Only in current PIQ: Create meetings in PIQ+ only, view historical meetings in current PIQ.
- 3. Hide in current PIQ: Create meetings in PIQ+ only, historical meetings and menus related to meetings will be hidden in current PIQ.

The Transition Phase setting is located under Utilities>Settings>PIQ+ tab. This is visible once your account has been enabled for PIQ+.



## How to change Quorum percentage - Global



Global quorum percentage in PIQ+:

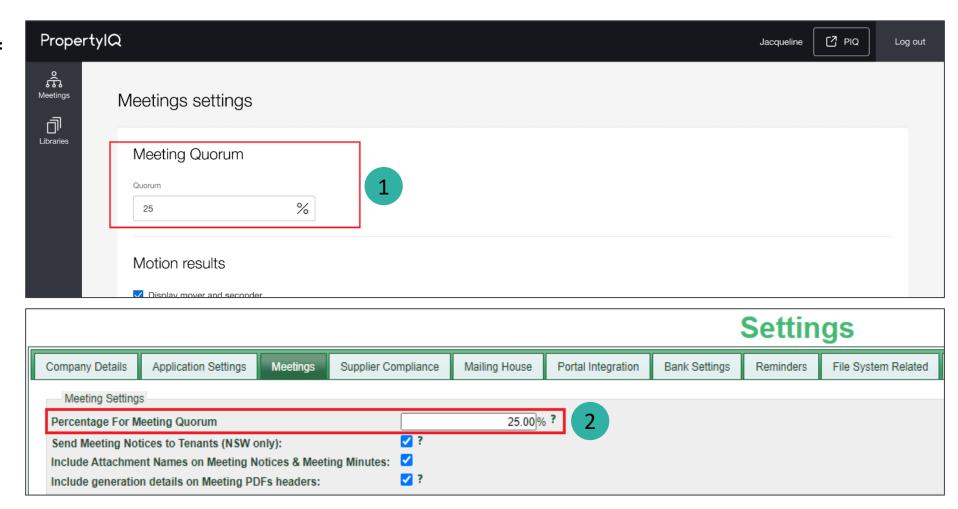
You can configure this in PIQ+ under **Settings menu>Meeting Quorum** section.

For new meetings, the quorum percentage used will be:

- **global** quorum; or
- building quorum if there is one (see Slide 5); or
- meeting quorum which can be manually entered for a specific meeting (see Slide 6).

Global quorum percentage in current PIQ:

- It's used to pre-populate the global quorum setting in PIQ+ (see Step 1).
- You can configure the global quorum percentage in current PIQ under Utilities> Settings> Meetings tab.



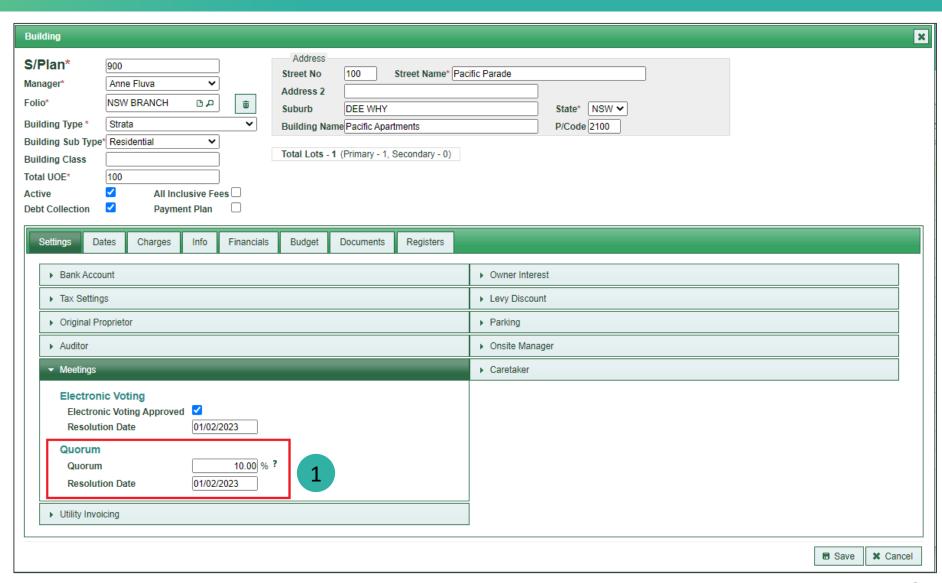
# How to change Quorum percentage - Building

# PropertyIQ

Building quorum percentage in **current PIQ:** 

 You can configure the quorum percentage for a building in current PIQ under Building card> Settings> Meetings accordion.

If a building percentage is set, it will override the global percentage and will be used for any new meetings created in PIQ+ for that building.



## How to change Quorum percentage - Meeting

# PropertyIQ

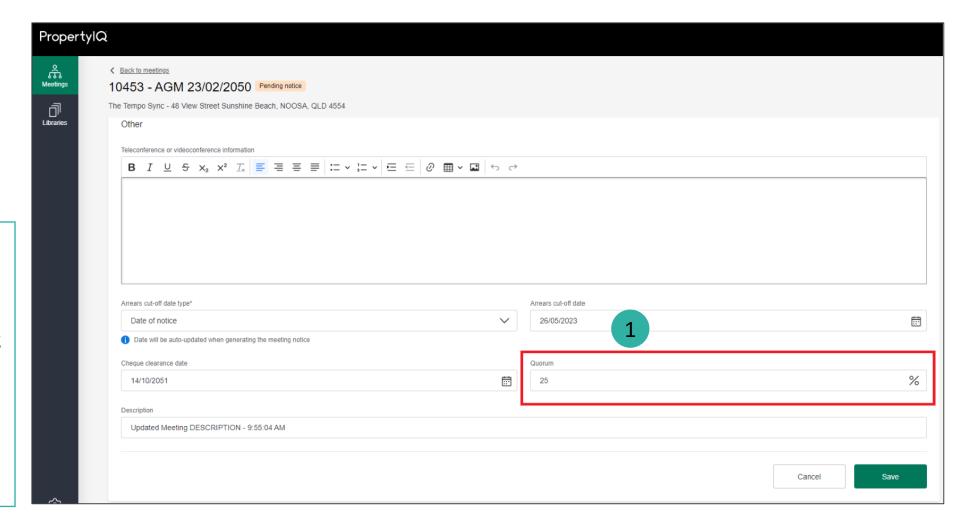
Meeting quorum percentage in **PIQ+:** 

You can configure the quorum percentage for a specific meeting in PIQ+ under the **Meeting> Details tab>Quorum** field.



### **TIP**

- If you need to update the quorum percentage and want it to apply to future meetings, update the quorum percentage setting under:
  - PIQ>Utilities>Settings> Meetings tab (globally);
    or
  - Building card>Settings tab> Meetings (for a building)



# How to enable Multi-OC meetings (Victorian clients)

# PropertyIQ

This setting allows Victorian clients to enable meetings for multi-OCs (where a building in PIQ is using schedules for each OC).

#### When enabled

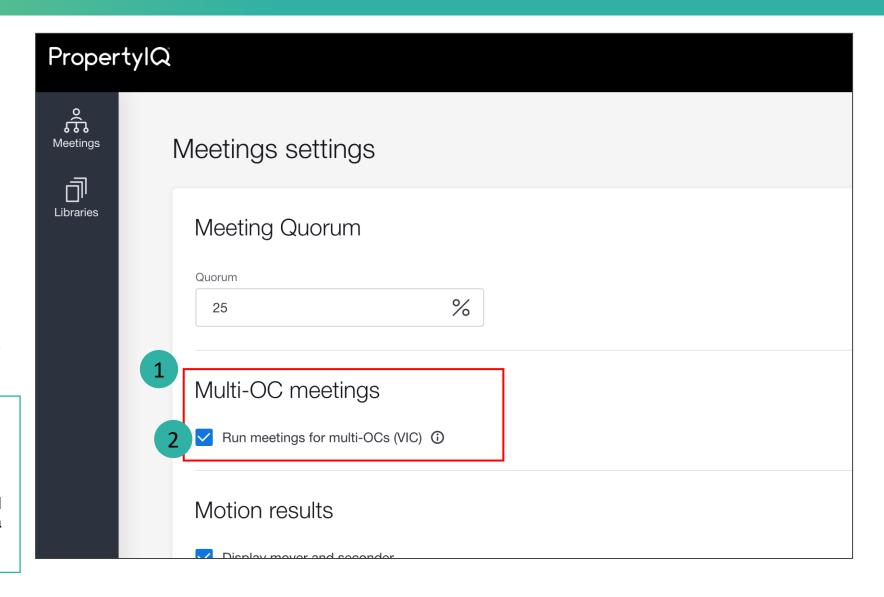
- When creating a new meeting, you'll see an option to select it as a multi-OC meeting.
- Displays OC details in the attendance screen and attendance details in the minutes (displays the schedules the lot contributes to).

Select the checkbox to enable/disable the setting. This is de-selected by default.



### TIP

- This setting currently only caters to multi-OC meetings where all OCs are included in the meeting.
- Future improvements are planned for multi-OCs, including creating a meeting for a single OC.



## **How to customise Motion Results settings**

# PropertyIQ

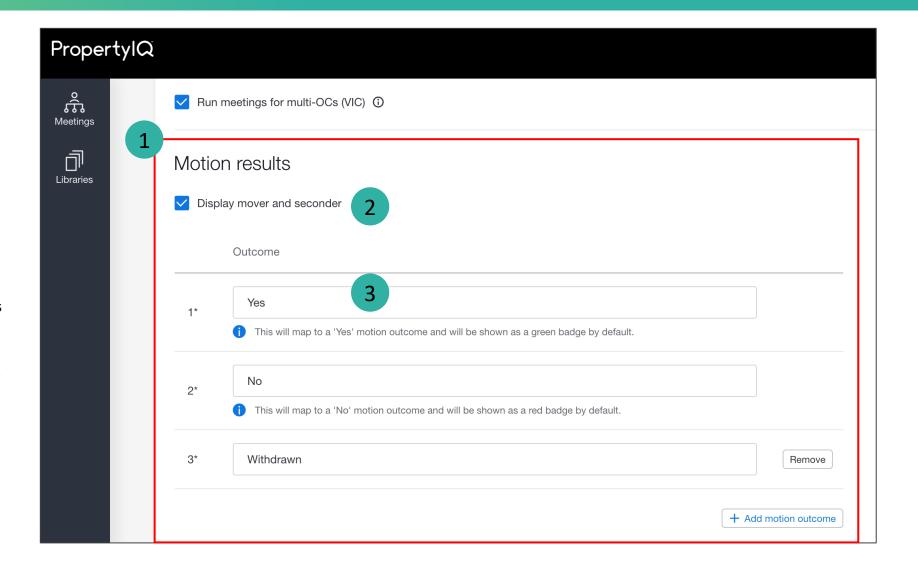
These settings will determine

- what you see and use on the Results screen in a meeting. See Slide 9 for an example.
- what is reflected in the meeting minutes.

Select the checkbox to enable/disable **mover and seconder** fields. This is de-selected by default.

Set **naming conventions** and options for motion outcomes e.g. carried, defeated, withdrawn, out of order.

- There are 'Yes' and 'No' options by default.
- Add more outcomes using the +Add motion outcome button.
- Remove an outcome using the Remove button.



## **How to customise Motion Results settings (continued)**



This is an example of the **Results** screen in a meeting, based on Motion result settings.

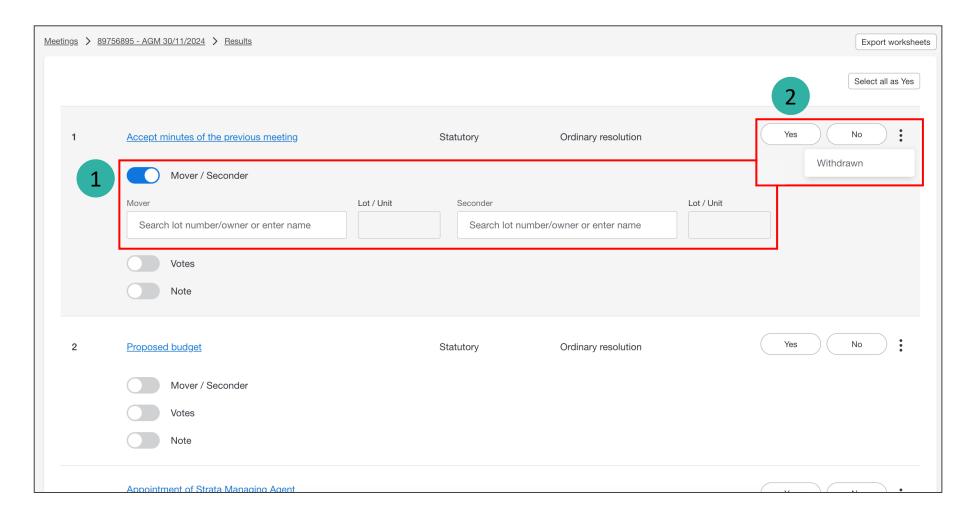
### Mover and seconder

When the mover/seconder setting is **enabled** (see Slide 8, Step 2), you'll see a toggle for each motion to optionally record the mover and seconder.

#### **Motion outcomes**

The outcome text you choose for 'Yes' and 'No' options will be displayed on the voting pills for each motion.

If you've created additional motion outcomes, you can select them in the motion : **Action Menu**.



## Important system behaviour



#### General

The options and terminology you select under Settings>Motion Results, will be used in the **Results** screen in a meeting and in **Motions** (setting default text for minutes for each possible outcome).

#### Motion outcome names

- Customise outcomes based on the terminology used in your state and your company preferences.
- There are "Yes" and "No" motion outcomes provided by default and are mandatory. You can still customise the name of these two outcomes e.g. change "Yes" to "Carried".
- The outcome names you nominate will be used in the meeting minutes document, where the **Motion for minutes** merge field is used in the meeting template minutes document.

### Changing motion outcomes (add, edit, remove)

- When making changes to outcome names
  - o New motions created will see these changes reflected immediately; and
  - o For existing motions, the name will only update upon editing the motion.
- When adding or removing outcomes, they will automatically be added/removed from all motions.
- When adding a new outcome, you'll also need to go to each motion and add text to the outcome field for the minutes; it will then appear in the meeting minutes.

## **Permissions**



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

## View and edit meetings settings

Users with: Utilities> Security> Role> Utilities - Settings	View	View Meetings Settings in read-only mode.
	Edit	Edit and make changes to Meetings Settings in PIQ+.



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