PropertyIQ

Release Notes April 2021

PropertyIQ Version 0.219.3
Portal Version 2.4

TABLE OF CONTENTS

Table of Contents **1**

Summary **2**

Changes related to portal 2

Fees schedule 3

Levy maintenance 3

General 4

Detailed screenshots **5**

Item 2 – Portal - De-registration of inactive lots & members 5

Item 3 - Portal - Administrator users & roles 6

New permissions 6

Resend invites to pending users 7

Deactivate/activate users 9

Deactivate/activate roles 11

Item 5 - Warning for duplicate fee schedule charges 13

SUMMARY

CHANGES RELATED TO PORTAL

Changes in PropertyIQ

1. **Portal registration screens** – Changes have been made to the PropertyIQ portal registration screens to avoid user errors when registering lots and members for the portal. Improvements include:

    - Lot Owners – Under *Utilities > Portal Control Panel > Register Lot Owners* screen and when selecting the 'Inactive' filter, the *Register* and *Deregister* buttons have been hidden. This ensures that inactive lots cannot be registered in error.

    - Committee Members – Under *Utilities > Portal Control Panel > Register Committee Members* screen, any committee members linked to an inactive building will no longer appear in the list of committee members to select for registration.

2. **Portal de-registration of inactive lots & members** – Changes have been made to automate the de-registration of lots and committee members when a building is made inactive. Improvements include:

    - De-registration when a building is deactivated – When deactivating a building in PropertyIQ (e.g. untick the *Active* checkbox on the building card), the system will now check if there are lots and committee members registered for portal. If there is, PropertyIQ will automatically de-register them and you will see a warning message when deactivating the building that states "Any lots and/or committee members registered for Portal will also be de-registered."

      Refer screenshot below.

      NOTE: If you reactivate a de-activated building, you will be required to manually register the lots and committee members again.

    - Retrospective de-registration of inactive lots & members – As part of the above change, we have also completed a clean-up of data to ensure that any lots or committee members linked to an inactive building that are still registered for the portal are de-registered on the next portal sync.

Changes in Portal

3. **Portal administrator > Users & roles** – Improvements have been made to the Users & Roles feature for administrators. Improvements include:

    - New permissions – 3 new permissions have been added for portal administrators.
        - *Resend invitations for pending accounts* – This permission will allow a portal admin user to resend invitations to other portal admin users that have a status of 'pending'.
        - *Make a admin user active or inactive* - This permission will allow a portal admin user to set the status of other admin users as active or inactive.
        - *Make a admin role active or inactive* - This permission will allow a portal admin user to set the status of an admin role as active or inactive.

    - Users > Resend invites – Under *Portal > Administration > Users* tab, you will see a new option against admin users with a status of *Pending* to resend their invitation. Once the invitation is resent, the action is recorded in the portal audit trail history.

    - Users > Deactivate/activate users – Under *Portal > Administration > Users* tab and when viewing an individual user, you will see a new status toggle that will allow you to set the status of the user as *Inactive* or *Active*.

      When a user is marked as *Inactive*, their portal access will immediately be disabled. The user's status change will also be recorded in the portal audit trail history.

      NOTE: A user cannot change their own status. You cannot change the status of a Pending user.

- Roles > Deactivate/activate roles – Under *Portal > Administration > Roles* tab and when viewing an individual role, you will see a new status toggle that will allow you to set the status of the role as *Inactive* or *Active*.

  When a role is marked as *Inactive*, it will not appear in the list of available roles when assigning a role to a user. The role's status change will also be recorded in the portal audit trail history.

  NOTE: A user cannot change the status of their own role. You cannot change the status of a role if it's linked to any active or pending users.

Refer screenshots below.

4. **Portal administrator > 'log in as' feature** – An issue has been fixed that was preventing the download of documents when a strata administrator was logged in as the lot owner and/or committee member.

FEES SCHEDULE

5. **Warning for duplicate fee schedule charges** – When processing managing agent fees and charges under *Billing > Fee Schedules* screen, you'll now be warned if you attempt to process charges for the same period twice, or any overlapping date within that period, which would result in duplicate charges being created.

   Rules

   - The validation will apply to fee types of **Management Fees, Sundry Charges and Variable Charges**.
     NOTE: It is not possible to duplicate Activity Log charges.
   - If duplicate charges have been identified, you will see a warning message when clicking either the *Preview* or *Process* buttons on the Fee Schedules screen. You can then choose to proceed or cancel with the fee schedules run.
   - Duplicate charges are when the From/To dates entered overlap with a period from a previous fee schedule for the same building and same fee type selected.
   - The message will display the details of all previous fee schedule runs that are being duplicated in the current run, including each building, fee type and date period of the previous run. If the current fee run spans across multiple previous runs, each will show in a new row in the grid.
   - The validation will ignore any buildings that have been excluded from the run e.g. checkbox is ticked on the fee schedule screen under the *Exclude* column.

Refer screenshot below.

LEVY MAINTENANCE

6. **Deletion of chargeback levies** – When cancelling a chargeback levy under *Processing > Adjustments > Levy Maintenance* screen, the system will now apply the same cancellation/deletion rules to chargeback levies as it currently does to other standard and special levies.

   - If the chargeback **has not** been included on a notice issued to the lot, when clicking the *Cancel* button the system will delete the original levy and the charge will disappear from the lot ledger.
   - If the chargeback **has** been included on a notice issued to the lot, when clicking the *Cancel* button the system will not allow deletion and will instead create a credit note to contra the original charge. Both the original and the contra levies will be visible on the lot ledger.

   *IMPORTANT NOTE: This change is **not** retrospective and will only apply to chargeback levies created after this release. Any chargeback levies created prior to this release can still be deleted.*

7. **Document uploads virus scan -** When uploading a document within PropertyIQ, the system will now scan the file for any viruses or other malicious content. This virus scan has also been applied to APIs.
    - If there is no malicious content found, the upload will proceed as normal and the document will be saved into PropertyIQ.
    - If malicious content is found, the upload will be blocked and an error message will appear on screen that states "This file contained an error and was not uploaded."

    ! *IMPORTANT NOTE: This change is only applicable to Macquarie cloud hosted (AWS) clients and will be released to clients in a staged approach (small groups of clients at a time) over the next month.*

8. **Financial reports –**
    - Bulk financial reports – When generating bulk financial reports under *Reporting > Building > Financial accordion,* validation has been now added to date range fields to ensure the 'To' date entered is equal to or later than the 'From' date entered.
    - Prior year financial reports generated from building card – An issue has been fixed with the dates shown on a building's financial report when generated from *Building card > Financial Reports screen > Date Range Selection > Previous Financial Year dropdown.* If the financial year selected in the *Previous Financial Year* dropdown is one which states 'Opening Balances as At' (being the first financial year of the building in PIQ), then the report will now show the building's opening balance date (not the financial year start) as the start date in the header of the report. This is now consistent with the dates shown in reports when generating financial reports using the other date range options.
    - Supplier ledger report – When generating multiple supplier ledger reports, the jobs will now be queued in the jobs sidebar to avoid system errors.
9. **Audit trail –**
    - ABN changes captured - When updating the ABN on the *Building card > Settings* tab and the schedule ABN is subsequently updated, the change of ABN for the schedule will now be captured in the global audit trail and the building's log of changes.
    - Audit trail reports – An issue has been fixed for the audit trail report where if generating the report on a computer whose time zone was set to a different time zone to that nominated under PIQ application settings, some data was occasionally being missed out of the report if the entries were dated from around.
    - Global audit trail screen – Under *Utilities > Audit Trail* screen, the 'from' date will now default to 1 month prior to today's date to improve performance when initially loading the screen.
10. **Special levies screen** – An issue has been fixed where selecting the 'Don't deliver' option and previewing special levies was causing an error message to appear and cancel levy creation.
11. **Due notices screen performance improvements** – An issue has been fixed where sending a large amount of due notices in one run (e.g. 2000+) was causing an error to appear and sending of notices to fail. Performance improvements have now been made to prevent errors from occurring during large due notice runs.
12. **Activity log screen** – Under *Processing > Activity Log > Date range filter* section, the 'from' date will now default to 6 months prior to today's date to improve performance when initially loading the screen.

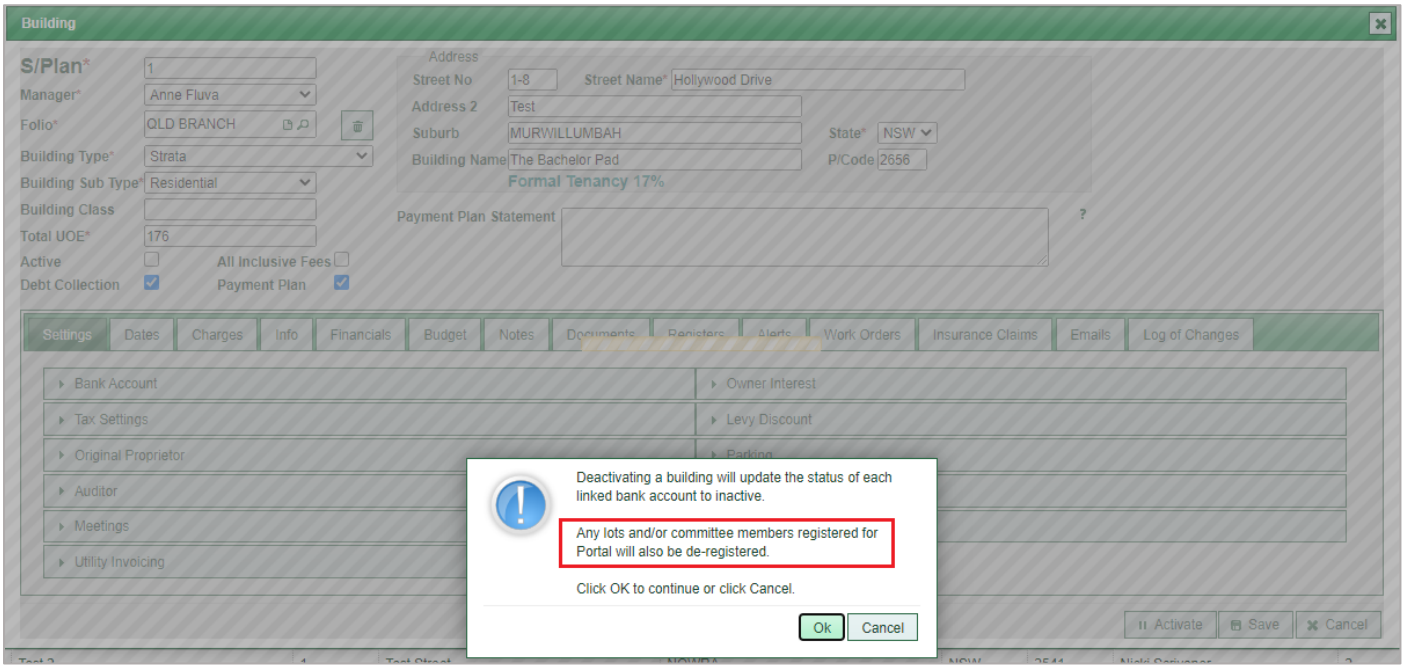
ITEM 2 – PORTAL - DE-REGISTRATION OF INACTIVE LOTS & MEMBERS

When deactivating a building in PropertyIQ (e.g. untick the *Active* checkbox on the building card), the system will now check if there are lots and committee members registered for portal.

If there is, PropertyIQ will automatically de-register them and you will see a warning message when deactivating the building that states “Any lots and/or committee members registered for Portal will also be de-registered.”

NOTE: *If you reactivate a de-activated building, you will be required to manually register the lots and committee members again.*

The warning message looks like this.



ITEM 3 - PORTAL - ADMINISTRATOR USERS & ROLES

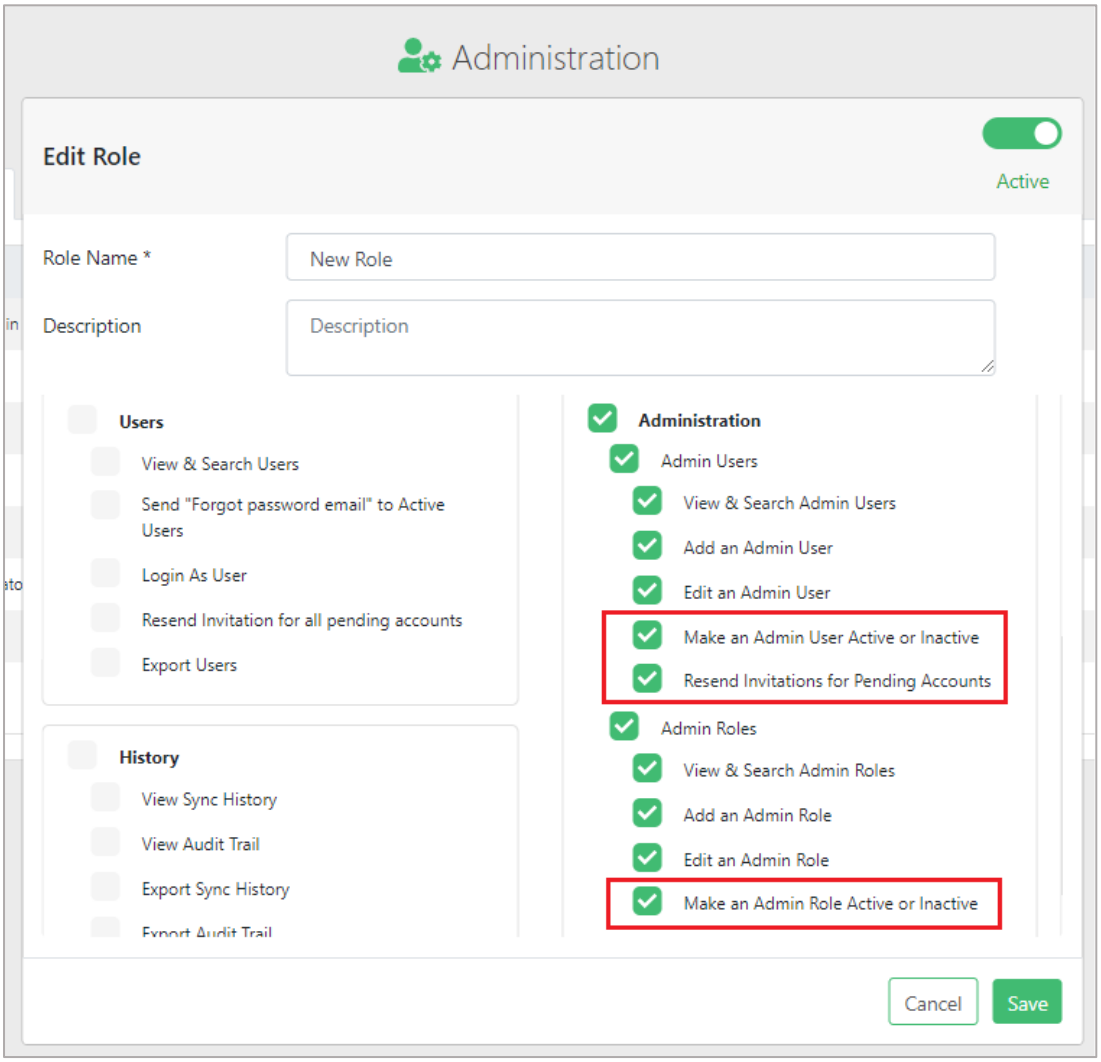
Improvements have been made to the Users & Roles feature for portal administrators. Improvements include:

- New permissions
- Resend invites to pending users
- Deactivate/active users
- Deactivate/active roles

NEW PERMISSIONS

There are 3 new permissions for portal administrators.

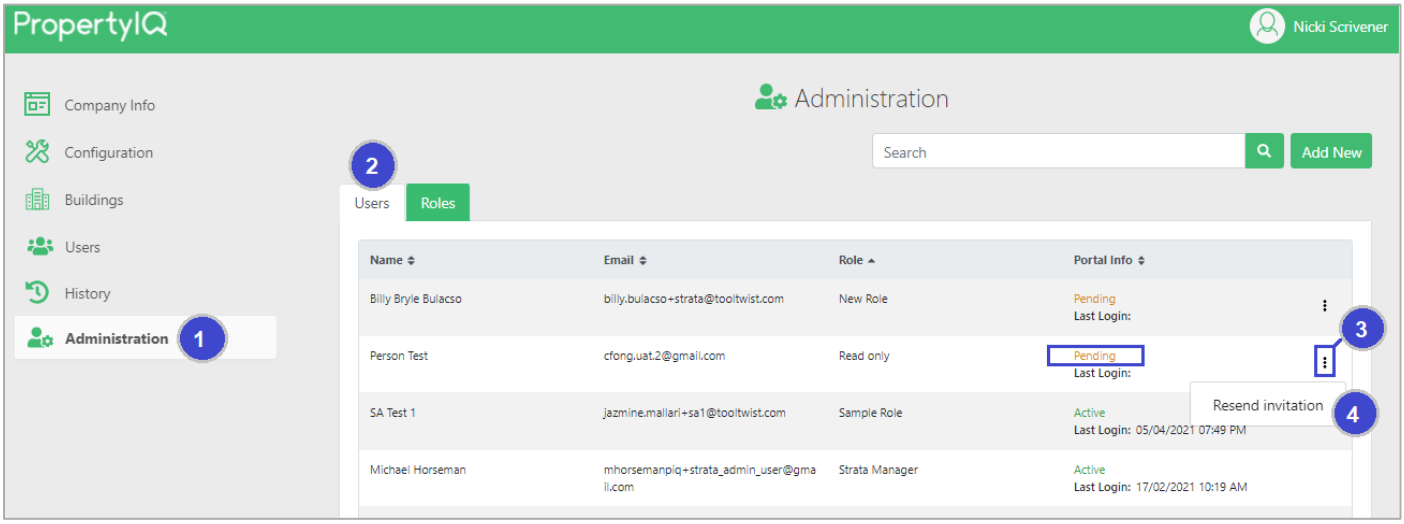
1. ***Resend invitations for pending accounts*** – This permission will allow a portal admin user to resend invitations to other portal admin users that have a status of 'pending'.
2. ***Make a admin user active or inactive*** - This permission will allow a portal admin user to set the status of other admin users as active or inactive.
3. ***Make a admin role active or inactive*** - This permission will allow a portal admin user to set the status of an admin role as active or inactive.



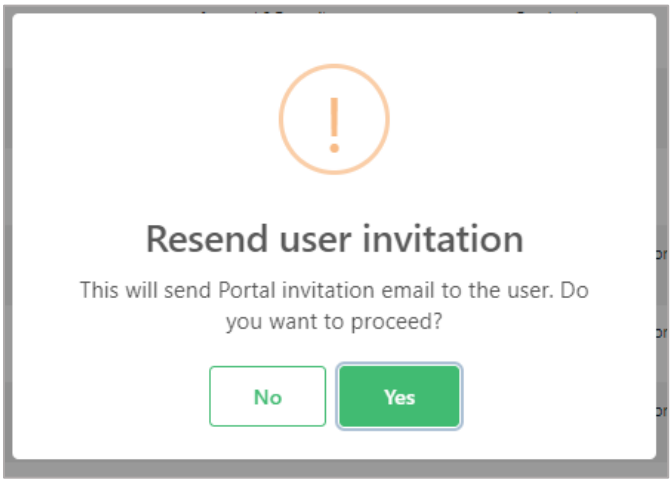
RESEND INVITES TO PENDING USERS

Under *Portal > Administration > Users* tab, you will see a new option against admin users with a status of *Pending* to resend their invitation. Once the invitation is resent, the action is recorded in the portal audit trail history.

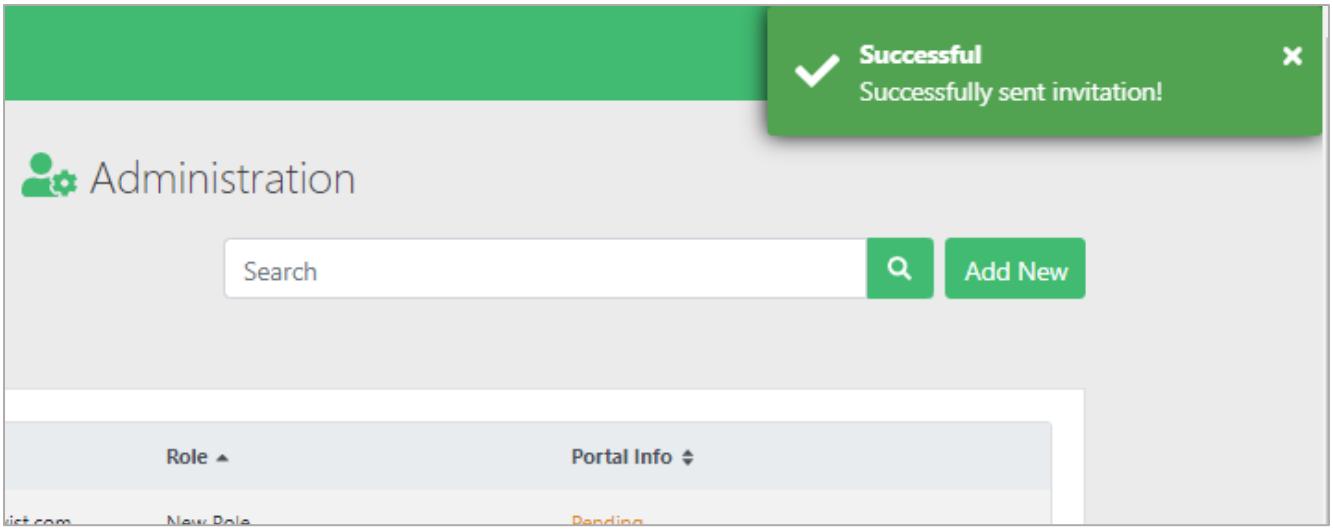
1. Go to Administration page
2. Go to Users tab
3. Find a user with a status of *Pending*. Click on the action menu ⋮
4. Select *Resend Invitation*

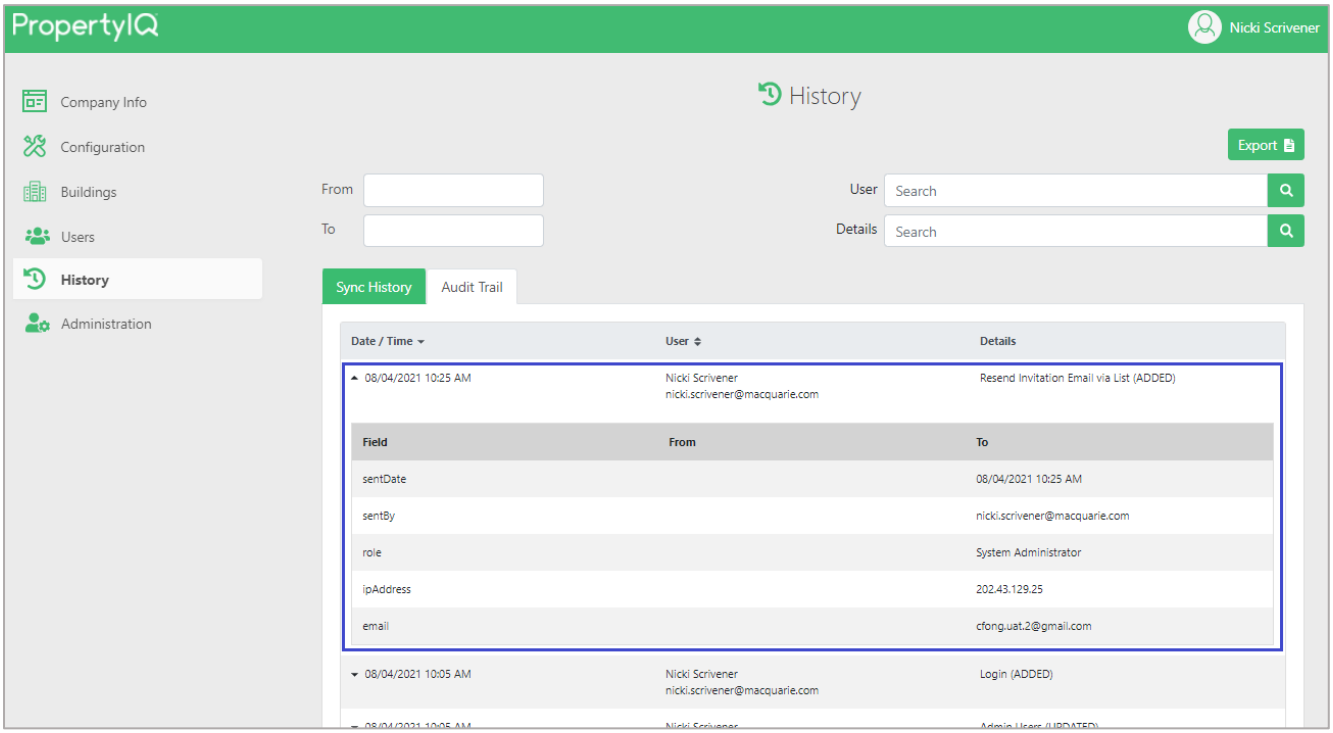


Select *Yes* to proceed, or *No* to cancel and return to the prior screen.



Once the invite has been successfully sent, you will see a confirmation message in the top right corner of the screen and the action is recorded under *History > Audit Trail*.


Successful
Successfully sent invitation!
Administration
Search
Add New
Role
Portal Info


PropertyIQ
Nicki Scrivener
Company Info
Configuration
Buildings
Users
History
Administration
History
Export
From
To
User
Search
Details
Search
Sync History
Audit Trail
Date / Time
User
Details
08/04/2021 10:25 AM
Nicki Scrivener
nicki.scrivener@macquarie.com
Resend Invitation Email via List (ADDED)
Field
From
To
sentDate
08/04/2021 10:25 AM
sentBy
nicki.scrivener@macquarie.com
role
System Administrator
ipAddress
202.43.129.25
email
cfong.uat.2@gmail.com
08/04/2021 10:05 AM
Nicki Scrivener
nicki.scrivener@macquarie.com
Login (ADDED)

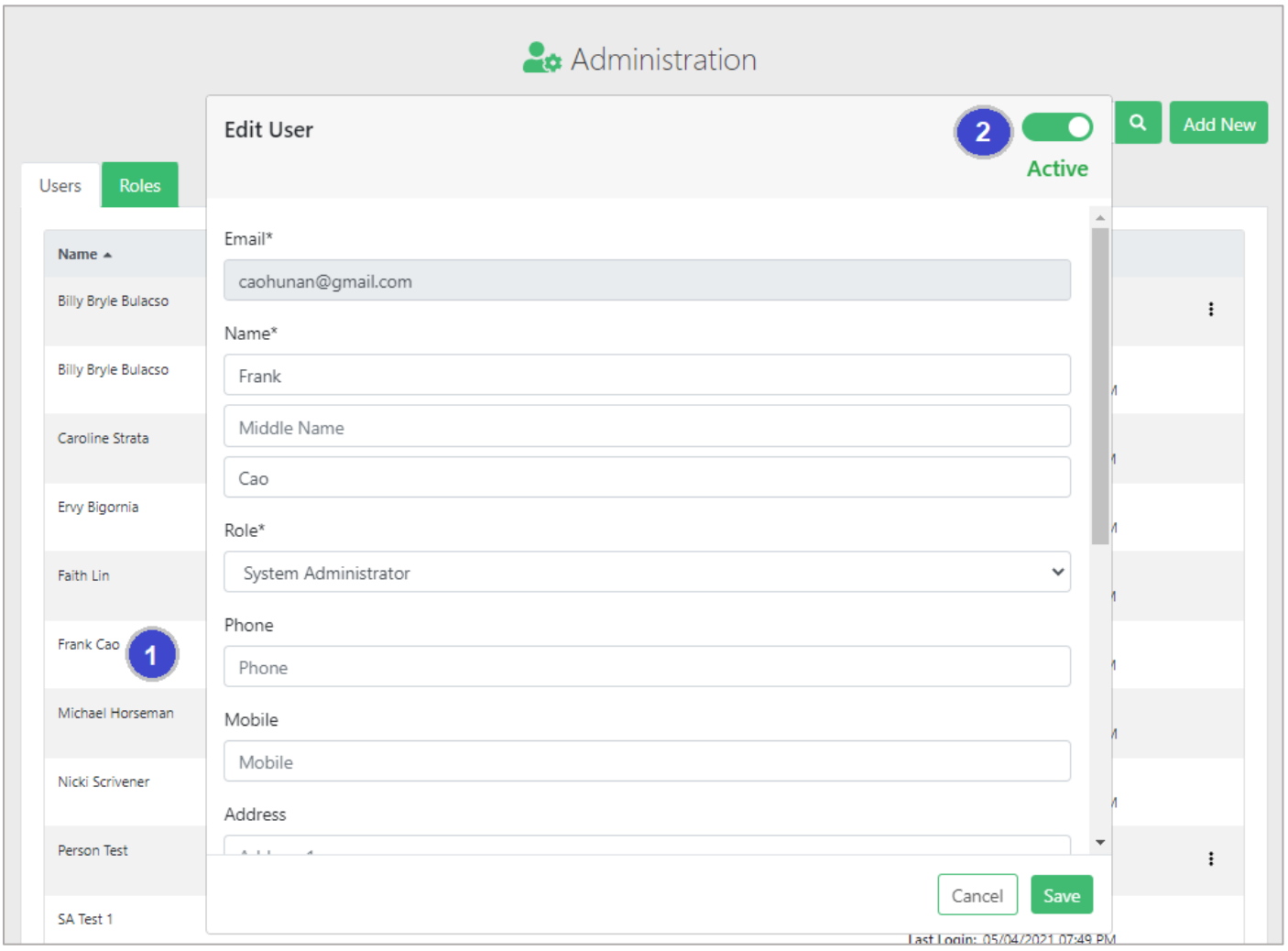
DEACTIVATE/ACTIVATE USERS

Under *Portal > Administration > Users* tab and when viewing an individual user, you will see a new status toggle that will allow you to set the status of the user as *Inactive* or *Active*.

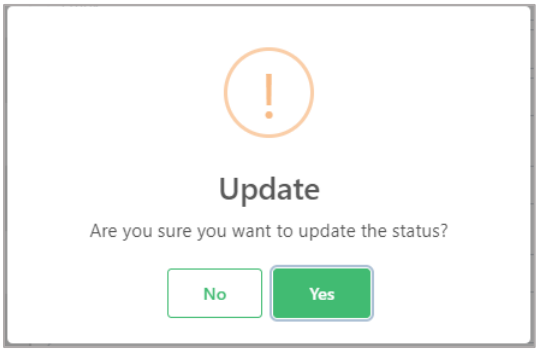
- When a user is marked as *Inactive*, their portal access will immediately be disabled.
- The user's status change will also be recorded in the portal audit trail history.

***NOTE**: A user cannot change their own status. You cannot change the status of a Pending user.*

1. Click on an individual user to view the details
2. Click on the status toggle to change the user's status from *Active* to *Inactive*, or *Inactive* to *Active*.

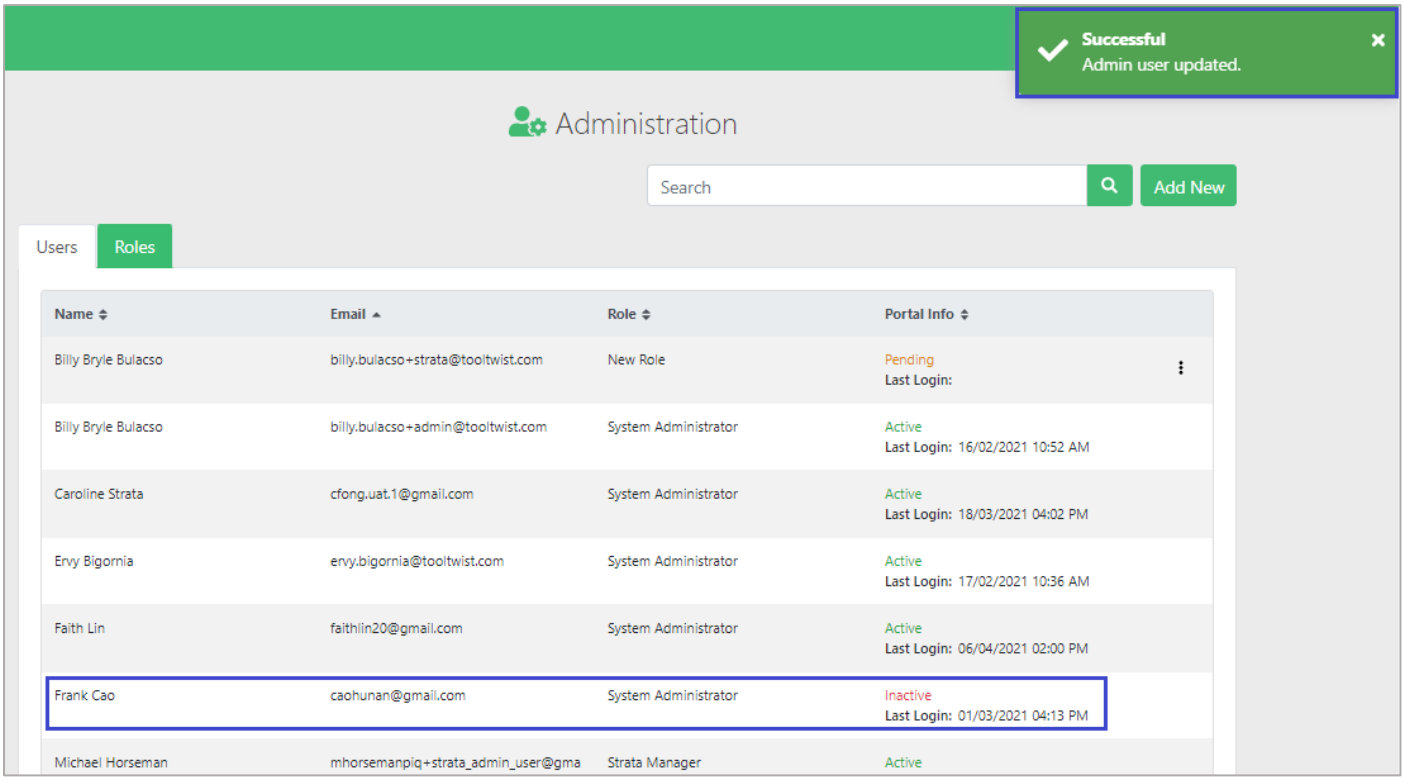


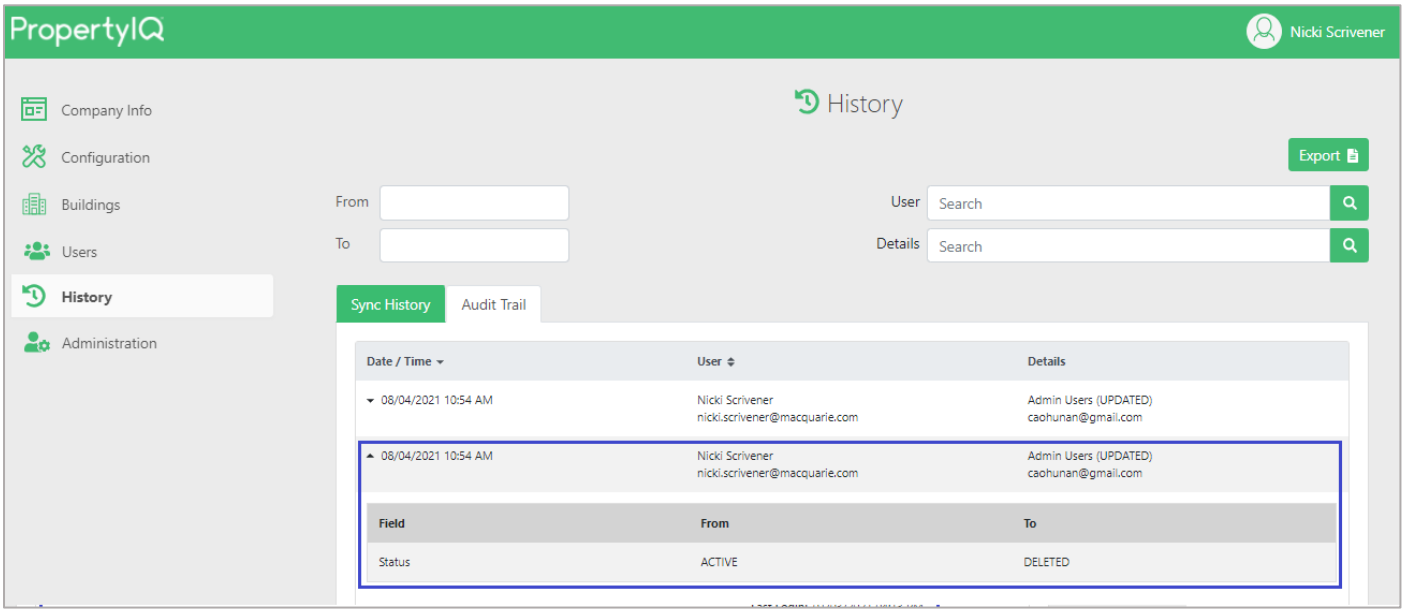
You will then see a confirmation message. Click *Yes* to proceed with the change, or *No* to cancel and return to the previous screen.



Once the status change has been completed, you will see:

- a confirmation message in the top right corner of the screen
- the user's status is updated in the list of users. In the example below, it's changed from *Active* to *Inactive*; and,
- the action is recorded under *History > Audit Trail*.





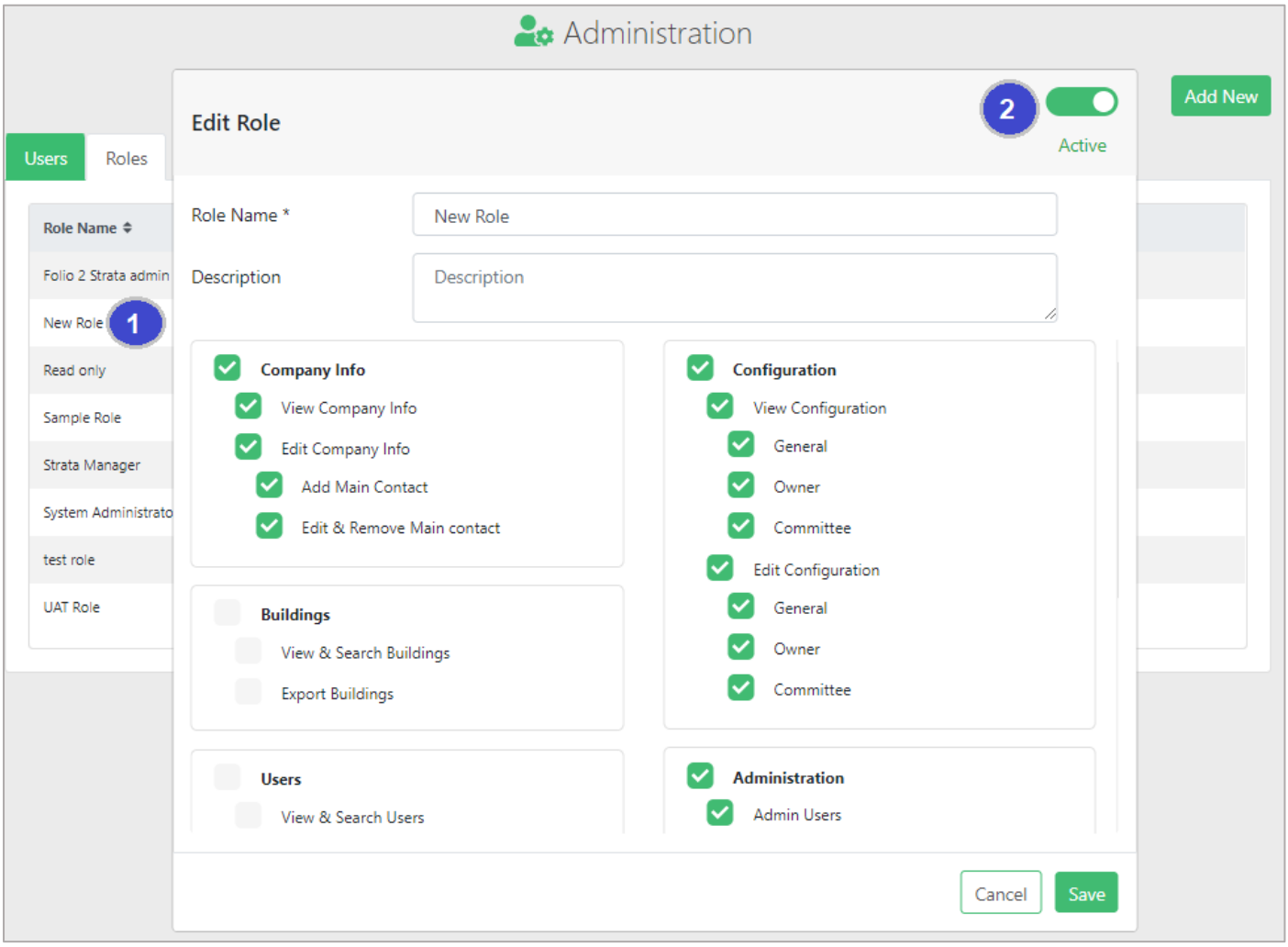
DEACTIVATE/ACTIVATE ROLES

Under *Portal > Administration > Roles* tab and when viewing an individual role, you will see a new status toggle that will allow you to set the status of the role as *Inactive* or *Active*.

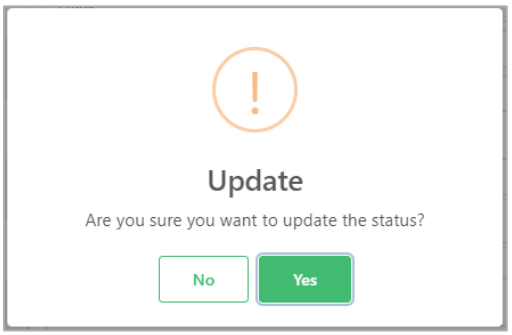
- When a role is marked as *Inactive*, it will **not** appear in the list of available roles when assigning a role to a user.
- The role's status change is recorded in the portal audit trail history.

NOTE: *A user cannot change the status of their own role. You cannot change the status of a role if it's linked to any active or pending users.*

1. Click on an individual role to view the details
2. Click on the status toggle to change the role's status from *Active* to *Inactive*, or *Inactive* to *Active*.

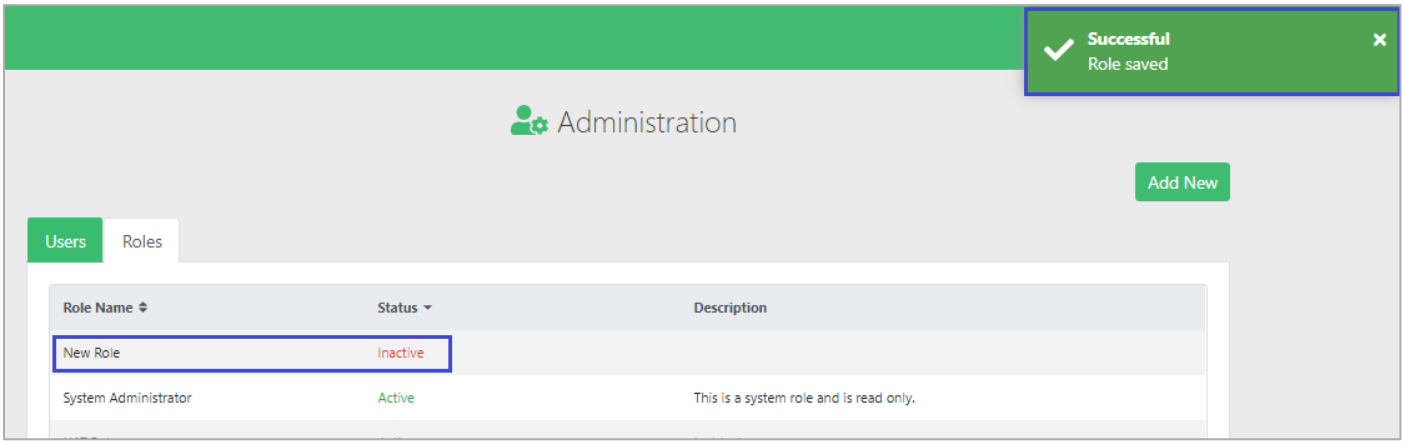


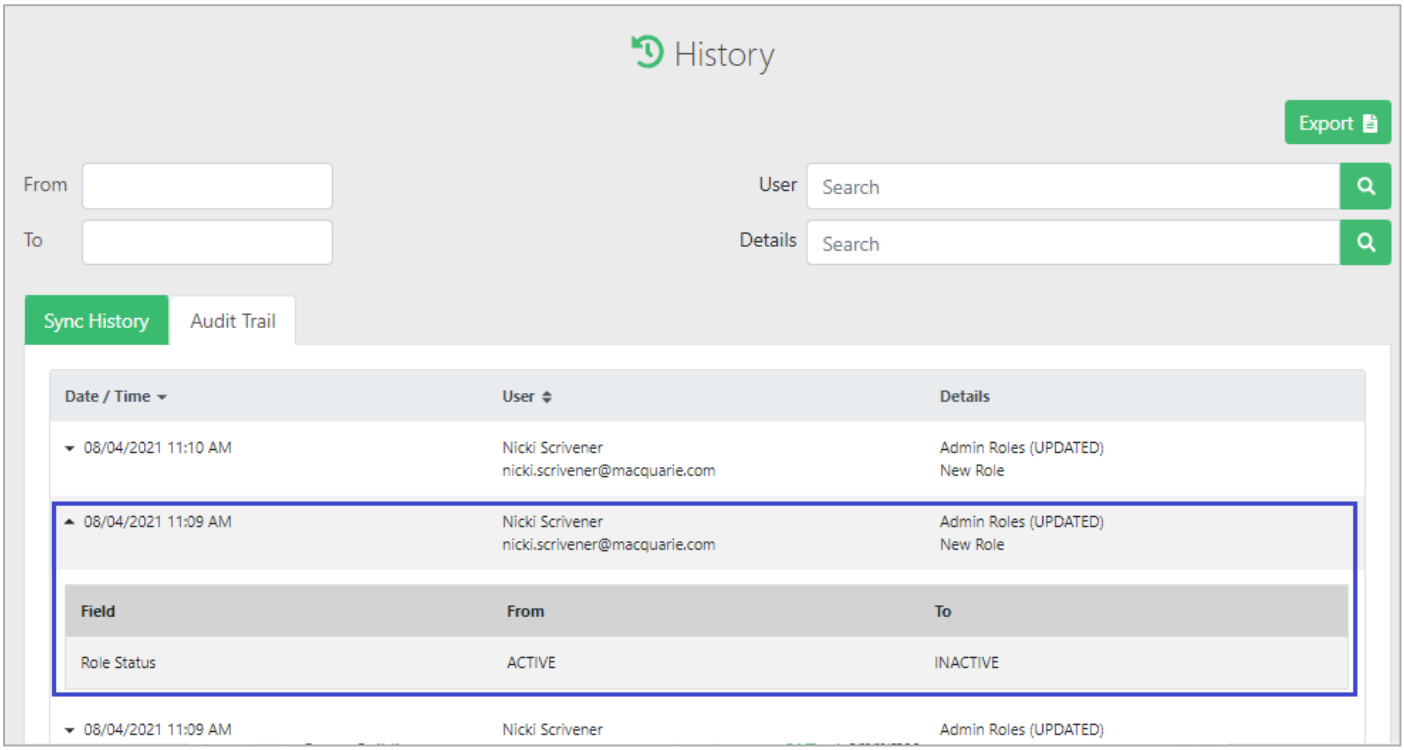
You will then see a confirmation message. Click *Yes* to proceed with the change, or *No* to cancel and return to the previous screen.



Once the status change has been completed, you will see:

- a confirmation message in the top right corner of the screen
- the role's status is updated in the list of roles. In the example below, it's changed from *Active* to *Inactive*; and,
- the action is recorded under *History > Audit Trail*.

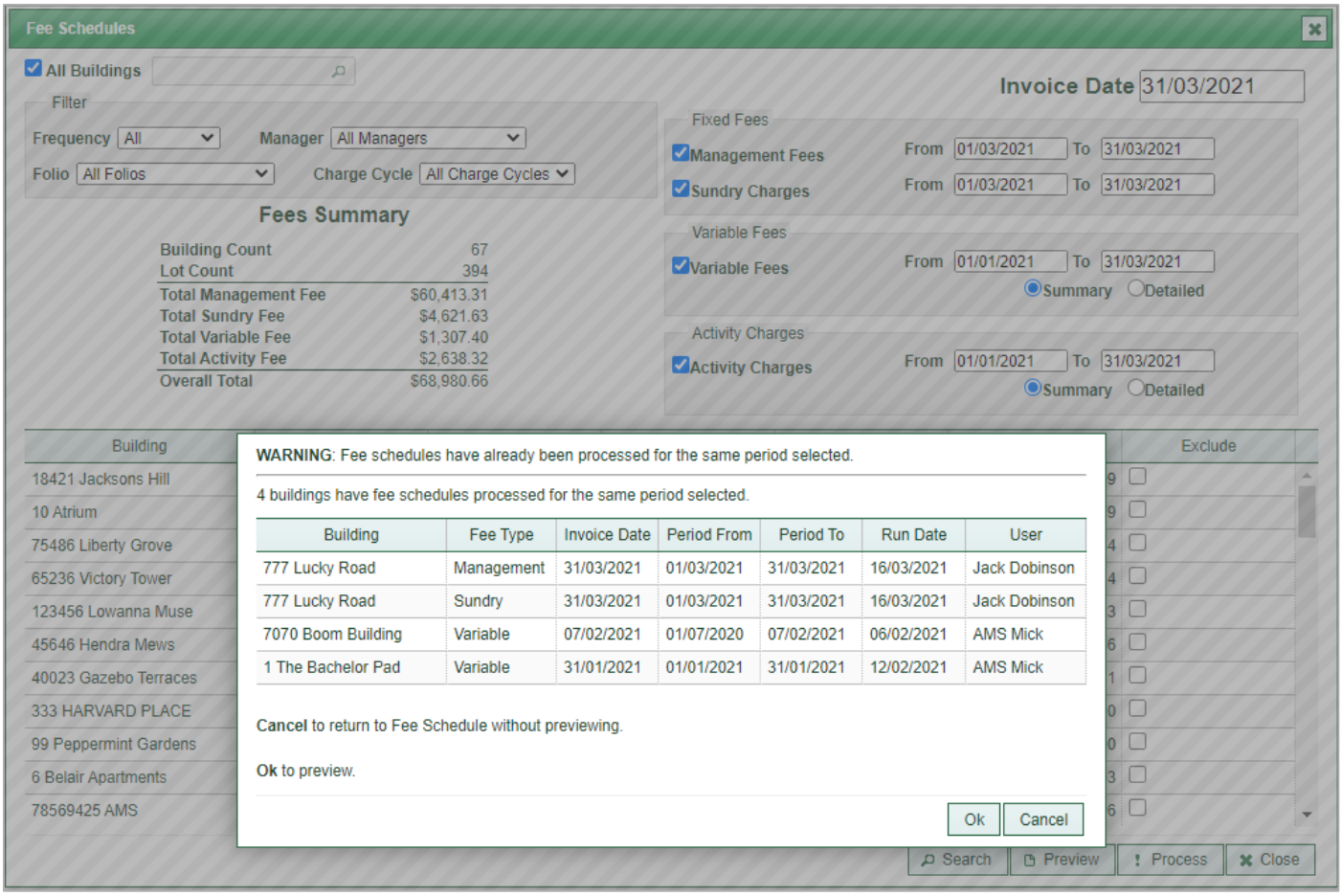




ITEM 5 - WARNING FOR DUPLICATE FEE SCHEDULE CHARGES

When processing managing agent fees and charges under *Billing > Fee Schedules* screen, you'll now be warned if you attempt to process charges for the same period twice, or any overlapping date within that period, which would result in duplicate charges being created.

Rules

- The validation will apply to fee types of **Management Fees, Sundry Charges and Variable Charges**.
  NOTE: It is not possible to duplicate Activity Log charges.
- If duplicate charges have been identified, you will see a warning message when clicking either the *Preview* or *Process* buttons on the Fee Schedules screen. You can then choose to proceed or cancel with the fee schedules run.
- Duplicate charges are when the From/To dates entered overlap with a period from a previous fee schedule for the same building and same fee type selected.
- The message will display the details of all previous fee schedule runs that are being duplicated in the current run, including each building, fee type and date period of the previous run. If the current fee run spans across multiple previous runs, each will show in a new row in the grid.
- The validation will ignore any buildings that have been excluded from the run e.g. checkbox is ticked on the fee schedule screen under the *Exclude* column.

The warning message looks like this.