

STRATA Master and fileSMART Integration Setup & Use

For all agencies that are using both STRATA Master and fileSMART for Strata (Version 4.6.1 onwards), you are able to configure fileSMART in place of the internal document register in STRATA Master.

This will allow you to automatically archive documents from STRATA Master into fileSMART so you will have one location for all your documents.

When fileSMART has been configured as your document management system, you are able to publish documents from STRATA Master through fileSMART, or directly from fileSMART to the Owner and Executive Portals.

If you are not yet using fileSMART we recommend that you view the online demonstration below and learn more about how fileSMART can streamline your business, help reduce costs, save space and help the environment.

<http://www.rockend.com.au/Page2.aspx?category=1&element=270>

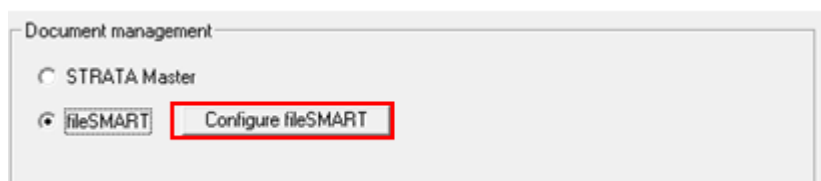
Setup Instructions

Configure STRATA Master for fileSMART Integration

Before you can start archiving documents or launch fileSMART directly from STRATA Master you need to configure the folders where the documents will be filed to ensure the documents are being archived in the correct location. A user with the required security access must setup the fileSMART configuration.

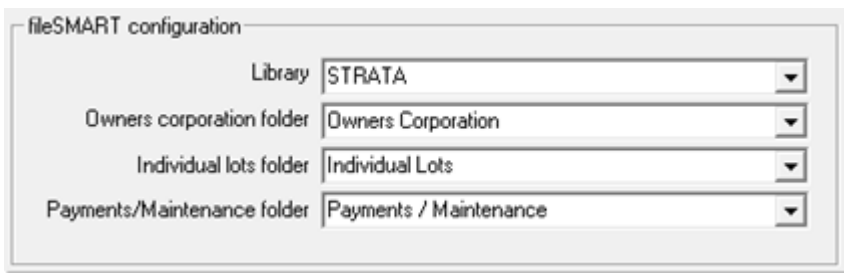
To configure fileSMART in STRATA Master:

1. From Configure > Agency > Options # 3,
2. Click on **Edit**, or F3,
3. Select the fileSMART radio button, and click on the Configure fileSMART button. You will be prompted with a fileSMART login screen.



4. Complete the mapping of the folders as shown below.

Note: In most cases the library name will be MAIN. For agencies operating multiple libraries (e.g. STRATA Master and REST) the library will be named STRATA.



The image shows a screenshot of the 'fileSMART configuration' window. It contains four dropdown menus:

- Library: STRATA
- Owners corporation folder: Owners Corporation
- Individual lots folder: Individual Lots
- Payments/Maintenance folder: Payments / Maintenance

1. Click **Save**, or F5.

Configure fileSMART for Integration with STRATA Master

It is now necessary to configure the Owners Corporation and Individual Lots folders in fileSMART.

In fileSMART:

1. Select File > Integration Field Mapping
2. Select **STRATA Master** from the list to Integrate with.
3. Select the **MAIN** library in fileSMART.
4. In most cases the library name will be MAIN.
Note: For agencies operating multiple libraries (e.g. STRATA Master and REST) the library will be named STRATA.
5. Select the **Owners Corporation** folder and complete the **Field Mapping** as shown below.
6. Click **Apply**.
7. Select the **Individual Lots** folder and complete the **Field Mapping**.
8. Click **Apply**.
9. Select the **Payments / Maintenance** folder and complete the **Field Mapping**.
10. Click **Apply**.

Integration Field Mapping

Integrate With: STRATA Master

Library and Folder

Library: MAIN

Folder: Individual Lots

Trust: Strata

Serial No:

Field Mapping

Plan Number*	Plan Number	Doc Type*	Doc Type
Address*	Address	Date*	Date
Manager*	Manager	Notes	Notes
Lot Number*	Lot Number		
Unit Number*	Unit Number	Show on Portals	Show on Portals
Owners Name*	Owners Name		
Lot Address*	Lot Address		

Apply Done

See this article for more information on STRATA Master and fileSMART Integration "[Setup Documents on the Portals](#)"

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