

Setup Documents on Portals for Strata Master

Strata Master Version 5.5 introduced the ability to upload documents to your portals using Strata Communicator and **File Smart** Archive.

See this article for more information on Strata Master & File Smart Integration [Using File Smart Integration](#)

Strata Master Version 11.0 included an **upgrade to the Owner & Committee Portals**, including changes to the Documents page.

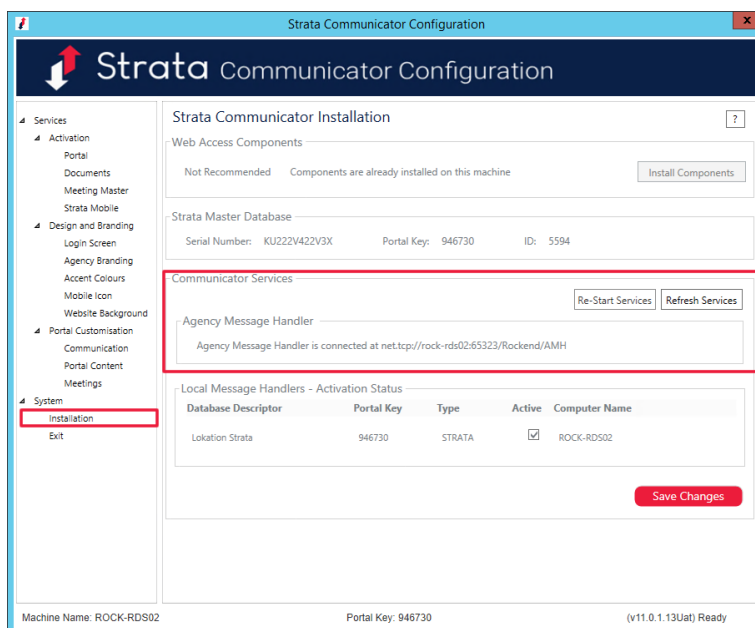
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Documents on Portals Setup

Prerequisites for using Documents on Portals

The installation of **Strata Communicator** and **Activation of Owner & Executive Portals** must be completed before setting up Documents on Portals.

Click on the Installation button under the System menu and ensure your message handler services are connected.



Minimum Product Versions:

Strata Master Version 5.5 or later together with **File Smart Version 4.7** or later must be installed to use

Documents on Portals

File Smart Version 6.5 or later must be installed to activate the *Document description* option. Click [here](#) for further details on the fileSMART Integration.

Strata Master Version 11.5 or later must be installed to have a separate Documents and Invoices tab on the Portals

Create a File Smart User with Publication Rights to the Portals

To allow documents on portals to be displayed you must create a user in File Smart with archive and search permissions. This user account will be used to communicate with File Smart from the portal.

NOTE: This user is not included in your licensed user count.

To create a new user in File Smart

1. Select **Manage User Permissions** from the File Smart toolbar.



2. Create a User named **Portal** and assign a password of your choice.

User Name	Password	Email	First Name	Surname
Portal	*****		Portal	

3. Select **Manage User Permissions** for the new user **Portal** and assign the Individual Lots, Owners Corporation and Payments / Maintenance folders for the user.
4. Check the **Archive** and **Search** boxes for each folder.

Folder Name	Archive	Search	Delete	Bulk Edit
Individual Lots	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Owners Corporation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payments / Maintena...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Later versions of File Smart should have the following checkboxes ticked for the 'Portal' user.

Workflow	Admin	Backup	Disabled	User Group
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Publisher

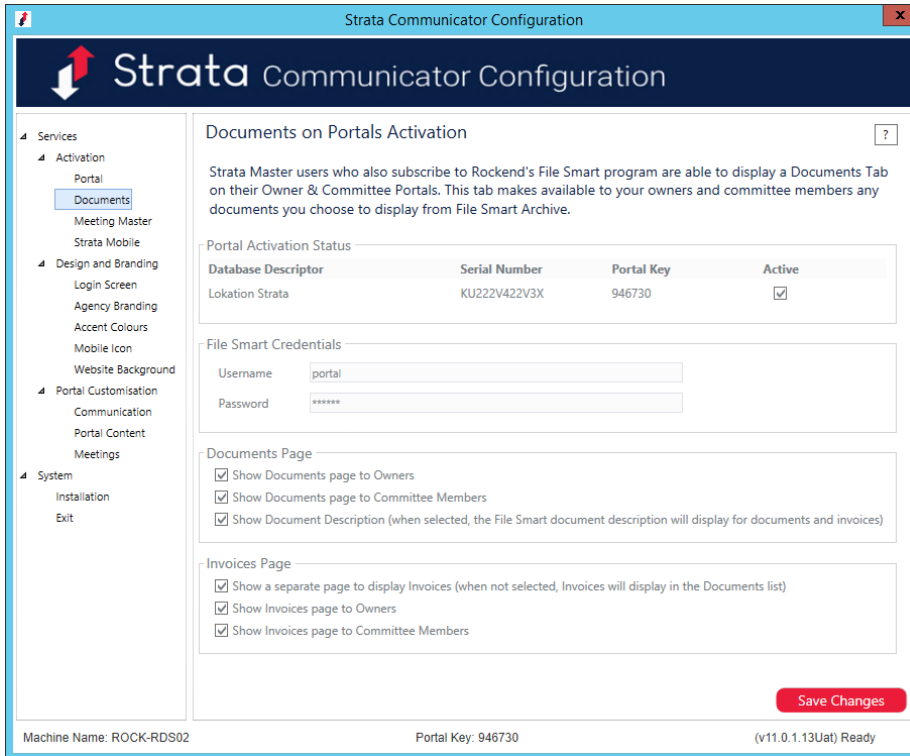
Activating Documents on Portals in Strata Communicator

Documents must be activated in Strata Communicator by a user with the required security level. When you have completed the next two steps your Owner and Executive portals will display an additional tab named Documents, and all documents marked to display on portals via Strata Master or directly from File Smart Archive

will be available for your Owners and Executives to view or download.

To activate your Strata Master database for publication of documents to the portals:

1. Click **Configure > Communicator Configuration**.
2. Click the **Documents** button under Services. The activation page displays your Strata Database.



3. Check the **Active** checkbox against your Strata database.

Portal Activation Status			
Database Descriptor	Serial Number	Portal Key	Active
Lokation Strata	KU222V422V3X	946730	<input checked="" type="checkbox"/>

4. In File Smart Credentials, enter the **Username** and **Password** as created in the instructions above.
5. In the Documents Page section you can;
 - Select whether to display the documents tab to Owners and/or Committee Members.
 - Select whether to display the document description saved in File Smart*.
6. In the Invoices Page section, if you wish to display invoices on a separate tab on the portals, select the option to show a separate page for invoices
 - If you have opted to show invoices on a separate page, you can select whether to display the invoices page to Owners and/or Committee Members.
7. Click **Save Changes**.
8. Click the **Exit** button under the System to close the screen.

***File Smart V6.5** or later must be installed to activate the Document description option.

