

Conversion from the Internal Document Register

Once fileSMART is configured as your document manager you will no longer be able to access documents previously registered in STRATA Master from the Corp screen. As these documents are located on your strata drive in a documents folder for each plan you are still able to navigate to them from your network, but they will not be as easy to locate, or filter through.

We have created a conversion program which will take a copy of your all existing documents in the STRATA Master Document Register and archive them in the fileSMART Owners Corporation folder

- The program is shipped with the upgrade of STRATA Master but is not accessed from the software
- The conversion program named **Internal Document Register Conversion** must be launched, configured and run from the Strata drive on the server

Configuring the Conversion Program

Prior to archiving the documents in fileSMART you must decide the document type for the converted document to be assigned against.

The left hand side lists each of the document types in the Internal Document Register in STRATA Master, and on the right side you can view which documents are used when archiving into fileSMART.

Inward Correspondence	Correspondence
Outward Correspondence	Correspondence
Strata Plan	Registered Plan
Title Certificate	Certificate of title
Assignment of Lease	Legal Matters
Discharge of Lease	Legal Matters
Lease Notification	Legal Matters
Mortgage Notification	Legal Matters
Mortgage Discharge	Legal Matters
Entry into Possession	Legal Matters
Transfer	Legal Matters
Photo	Photo
Status Certificate	Legal Matters
General Meeting Notice	General Meetings
General Meeting Minutes	General Meetings
Exec Meeting Notice	Committee Meetings
Exec Meeting Minutes	Committee Meetings
Policy	Insurance Policy
Valuation	Valuation
Memo	Correspondence
Court Order	Legal Matters
Other	Correspondence
Financial Statement	Interim Reports

You are also able to specify additional fields (if any) you wish to copy from the internal document register to be recorded against each document in the notes field in fileSMART.

<input checked="" type="checkbox"/> Description		
<input type="checkbox"/> Author	<input type="checkbox"/> Paper Location	<input type="checkbox"/> Date on Document
<input type="checkbox"/> Recipient	<input type="checkbox"/> Received/Served Method	<input type="checkbox"/> Date Sent

Archiving existing STRATA Master documents

The conversion program will identify how many documents are registered in STRATA Master, and the number of documents which it was able to locate.

- When you are ready to archive the documents you click the start button and a copy of each document found in the Document Register will be copied and archived to the Owners Corporation folder for the plan.
- The document type assigned, and any additional notes recorded in fileSMART will be based on your configuration of the conversion program.
- When copying and archiving each document from your internal document register a log file is compiled to record which documents have been copied and archived in fileSMART.
- If you encounter a problem during the conversion of documents you can to re-commence the migration of documents and be assured that the same document will not be copied twice.

See this article for more information on STRATA Master & fileSMART Integration ["Frequently Asked Questions in fileSMART"](#)