

# StrataVote

## How to Guide

### Summary

Strata Master Version 14 delivers a two-way integration with StrataVote, allowing Strata Master users to access the full breadth of StrataVote's unrivalled meeting functionality from within the Strata Master platform.

### Pre-requisites

- Strata Master Version 14 or higher
- Signed contract with StrataVote
- Completed implementation with StrataVote

If you are already using StrataVote and you would like to enable the two-way integration, please contact StrataVote by emailing [support.mripartner@stratavote.com](mailto:support.mripartner@stratavote.com)

For further information about StrataVote or to book a demo with the StrataVote team please click [here](#)

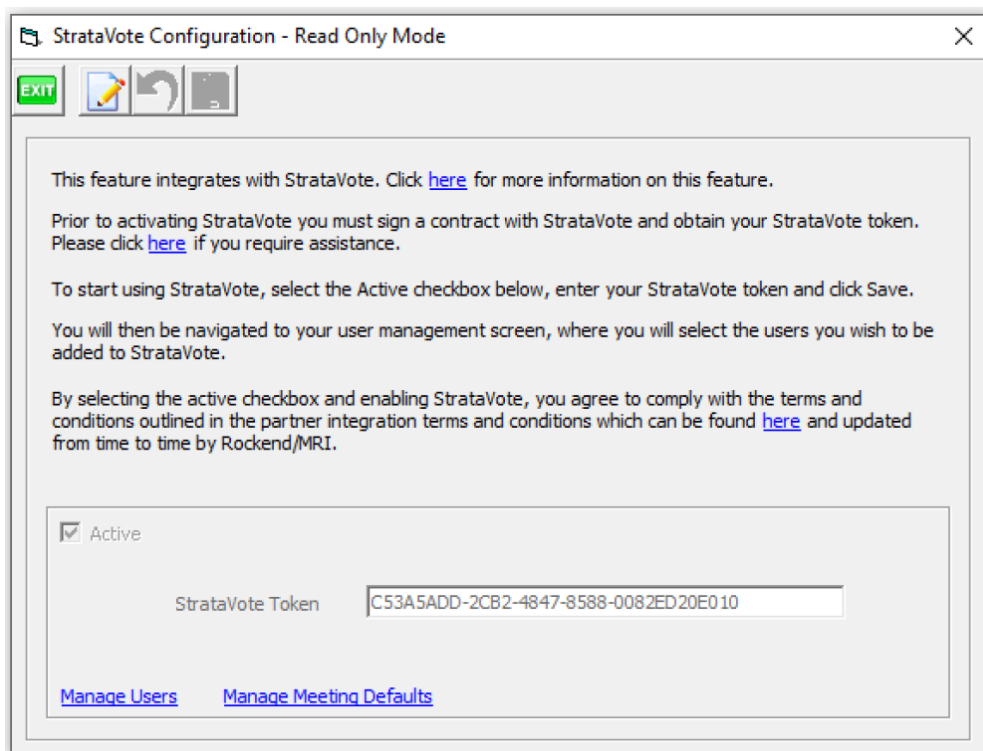
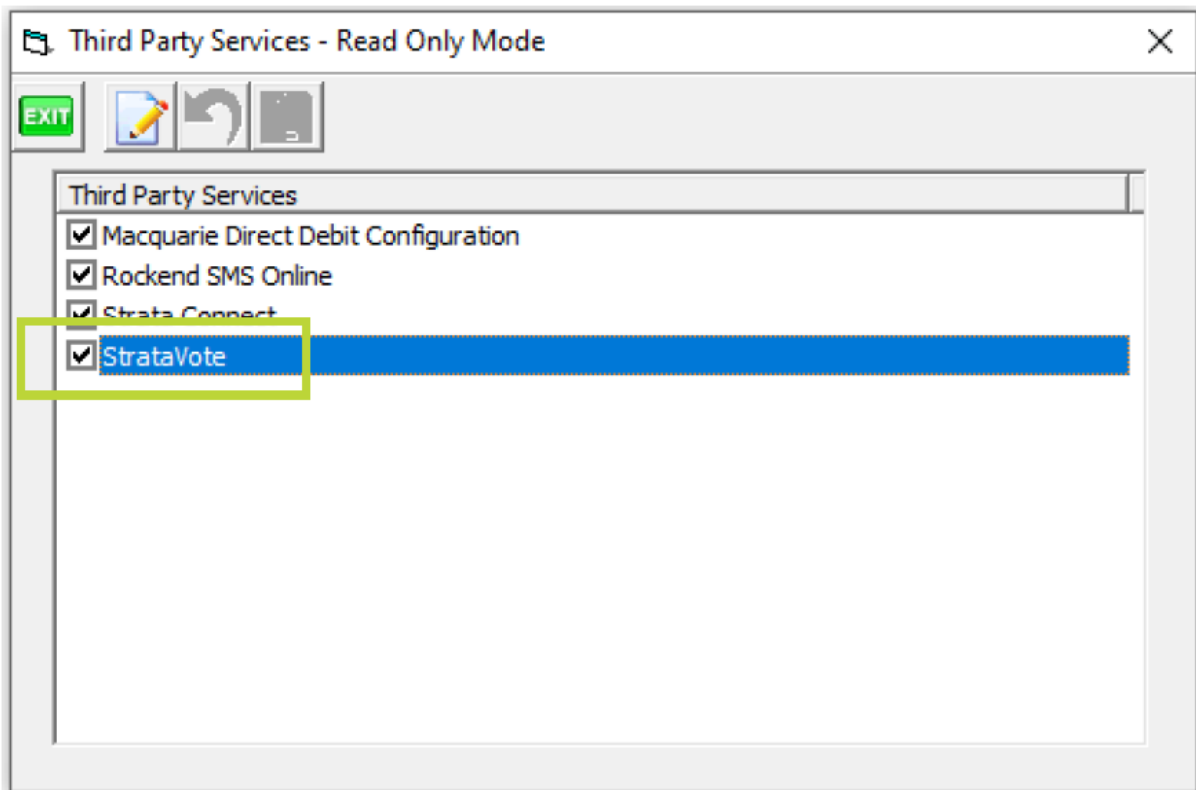
### Support

Once you have configured the integration, if you require support please contact StrataVote's Support Team at [support@stratavote.com](mailto:support@stratavote.com)

### Configuration

To activate this feature, please complete the following steps:

1. Navigate to Configure > Third Party Services
2. Select the 'Edit' button
3. Select the StrataVote checkbox
4. Click Save
5. Double click on StrataVote
6. Select the 'Edit' button
7. Select the 'Active' checkbox
8. Enter your StrataVote Token
9. Click Save



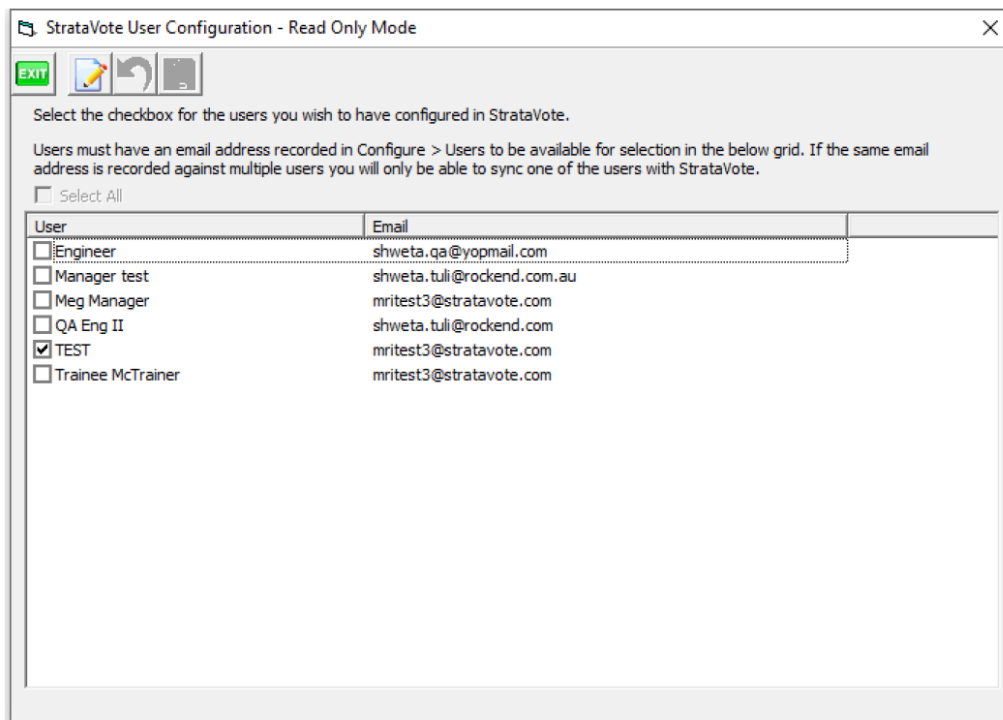
Once completed, you can continue with further configuration of Users and Document Archiving Defaults.

You can complete this step now or come back to it later using the same menu path, Configure > Third Party Services.

## Configure Users:

You must have Strata Master Version 14 or higher in order to activate this functionality. You will also require a signed contract with StrataVote, at which point you will be provided with a StrataVote Token, used to activate the feature in Strata Master.

1. Click 'Manage Users'
2. Select the 'Edit' button
3. Select the checkboxes for the Users you wish to configure
4. Click 'Save'
5. Click 'Exit'



Note: When adding new Strata Master Users, you will need to return to the Manage Users screen and repeat the above process to provide them access to StrataVote.

## Configure Document Archiving Defaults:

1. Click 'Manage Meeting Defaults' - here you will setup default values for archiving meeting documentation
2. Select the 'Edit' button
3. Select a default document type for Agendas
4. Select the checkbox if you wish to display Agendas on the Owner Portal or Committee Portal (if you are a File Smart user)
5. Select a Portal Description (if required)
6. Select a default document type for Minutes

7. Select the checkbox if you wish to display Minutes on the Owner Portal or Committee Portal (If you are a File Smart User)
8. Select a Portal Description (if required)
9. Click Save

StrataVote Meeting Archival Defaults - Read Only Mode

Meeting Archival Defaults

**Agenda**

Document Type: Annual General Meetings

Show On Owner Portal:

Show On Committee Portal:

Portal Description: Annual General Meeting Notes

**Minutes**

Document Type: Correspondence

Show On Owner Portal:

Show On Committee Portal:

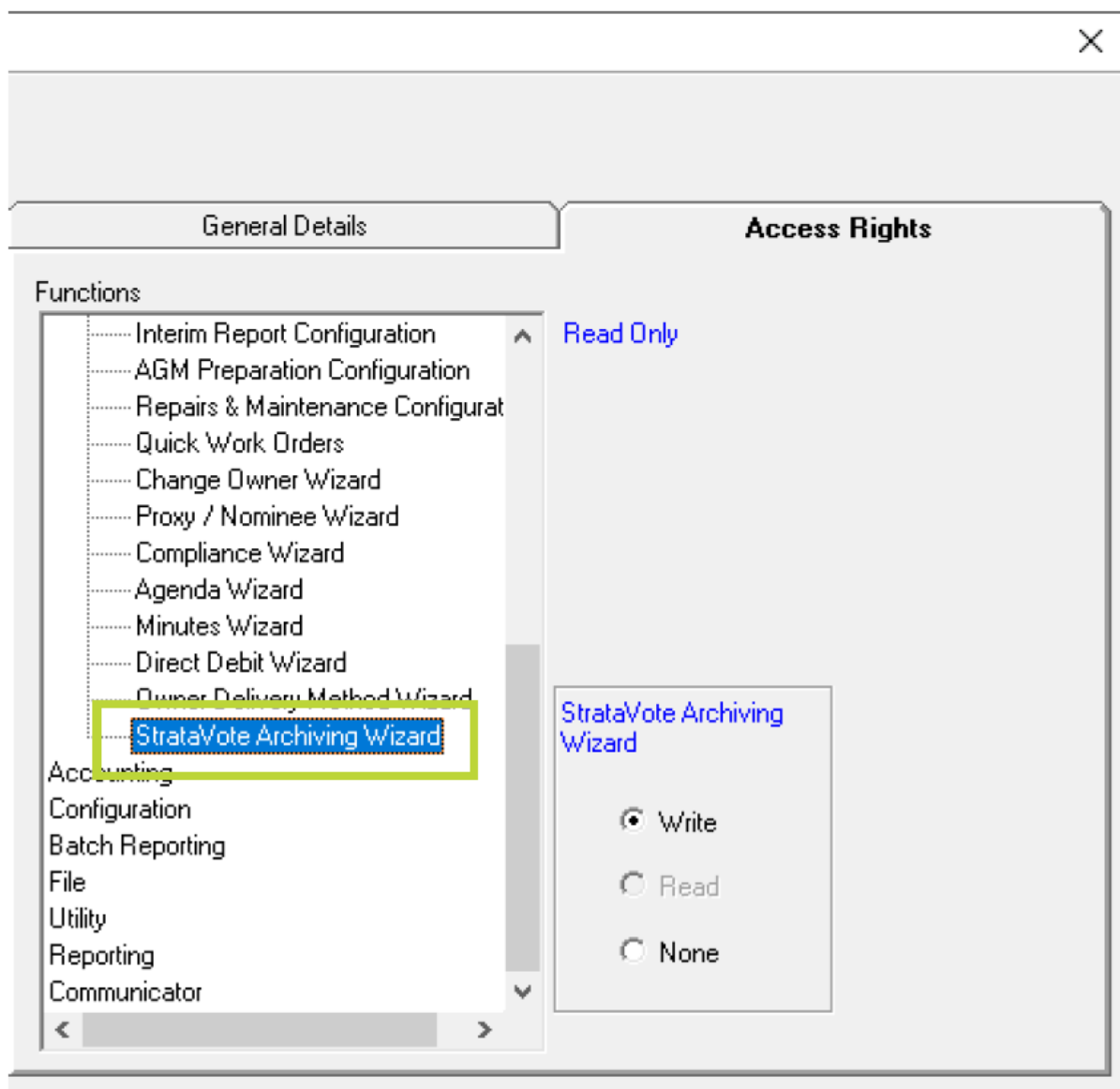
Portal Description: Annual General Meeting Notes

## User Access Rights:

The StrataVote integration introduces a new user access right for StrataVote Document Archiving. Managers will have access to this function by default, whereas other users will have the access right of 'none'.

To setup your team with the required access, please complete the following steps:

1. Navigate to Configure > Users
2. Select a User followed by the Access Rights tab
3. Double click on Management to expand your options
4. Select the 'StrataVote Document Archiving' option and provide the required access
5. Click 'Save'



## How to Launch StrataVote

After upgrading to Strata Master Version 14, there will be new StrataVote icons appearing throughout Strata Master.

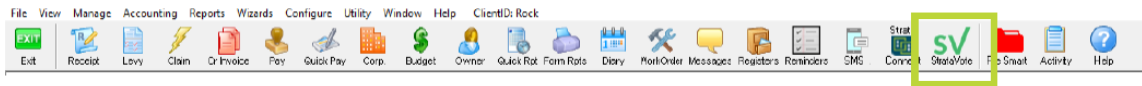
StrataVote will integrate with your existing business practices, providing quick access points from familiar locations, without requiring any additional sign in.

These locations are detailed below:

### Launch StrataVote from the Strata Master Toolbar

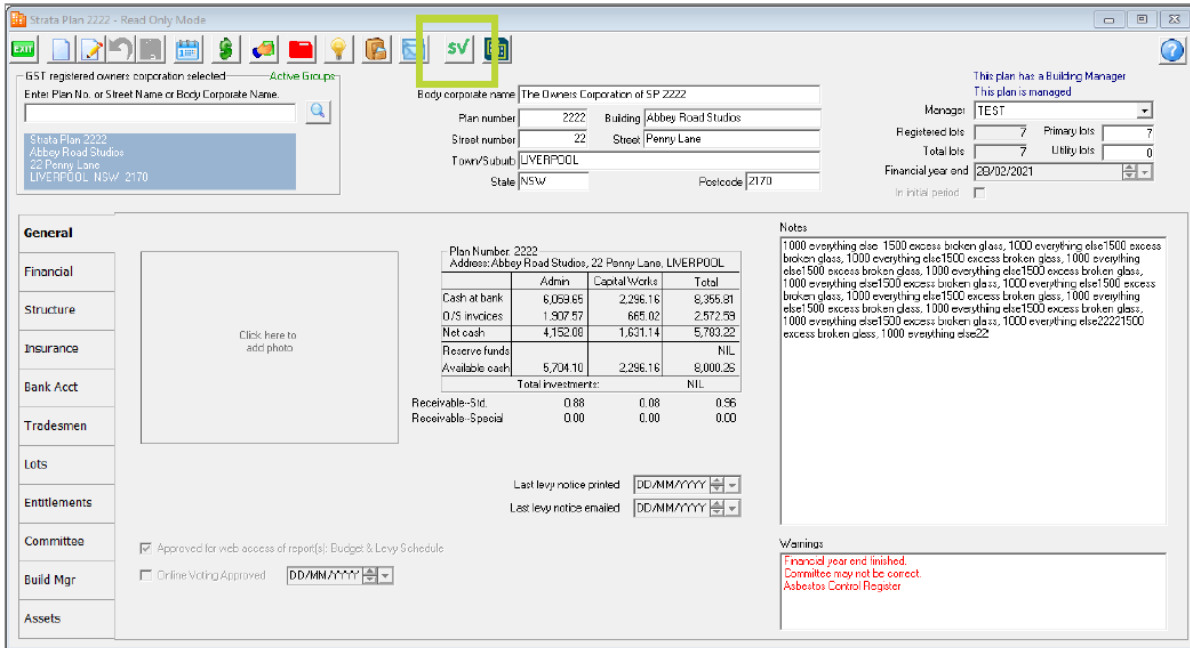
A new StrataVote icon will appear on the bottom toolbar in Strata Master.

Clicking this icon will launch StrataVote's dashboard page, with the user already signed into StrataVote, ready to create or view your meetings.



## Launch StrataVote from the Corporation screen

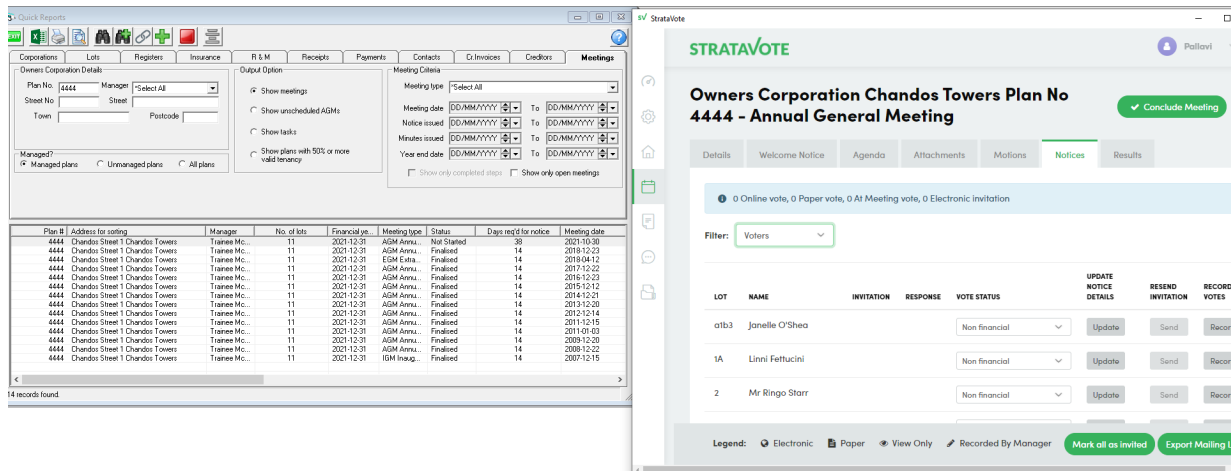
A StrataVote icon will now appear within each Corporation screen. Clicking this icon will open StrataVote with the Owners Corporation filtered. The user will already be signed in.



## Launch StrataVote from Quick Reports > Meetings Tab

All meetings created through StrataVote will be saved as records in Quick Reports. Navigating to the Meetings Tab will provide relevant information regarding each meeting.

You will also be able to click the Chain Link button, which will open the selected Meeting within StrataVote.



## Launch StrataVote from the Meetings Register

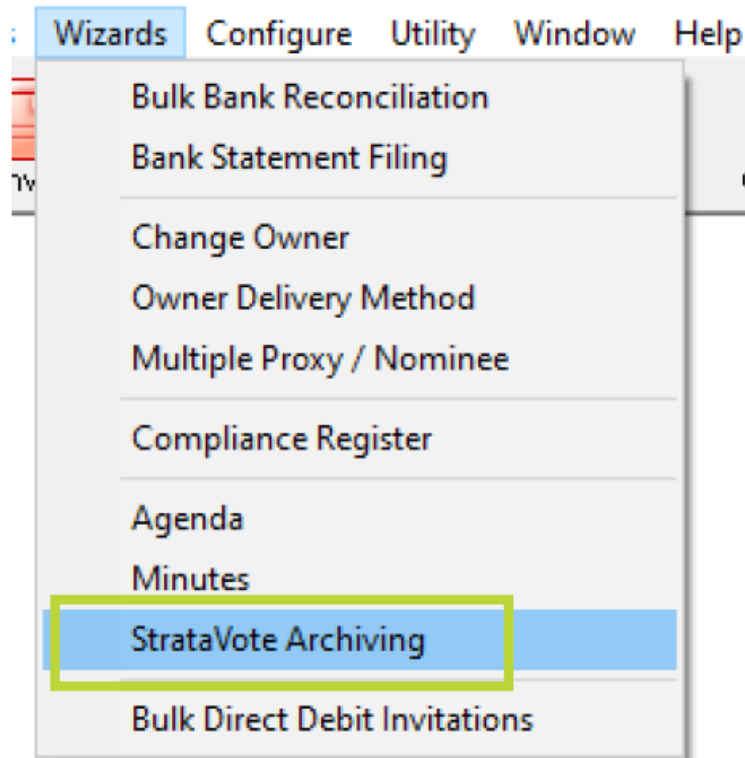
All your StrataVote meeting information will be stored in the meeting register. StrataVote meetings will be shown in green text, and will display the following information:



All Agendas and Minutes created through StrataVote will come through to the StrataVote Archiving Wizard, allowing Users to confirm or adjust their archiving preferences before documents are saved into File Smart or the Strata Master Document Register.

Users will have the ability to adjust whether or not these documents are archived, as well as adjusting document type, whether or not to publish on the Owner or Committee portals, and the Portal Description of each document.

To navigate to the StrataVote Archiving Wizard, select the Wizards Menu > StrataVote Archiving.



StrataVote Archiving Wizard

EXIT [Grid Icon]

Manager: \*Select All Document: \*Select All

All  All

Plan #	Meeting Type	Meeting Date	Agenda/Minutes	Document Type	Owner Portal	Committee Portal	Portal Description	Archive	Delete
2222	AGM	21/05/2021	Agenda	Annual General Meetings	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Annual General Meeting N	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3333	GM	22/05/2021	Minutes	Correspondence	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Annual General Meeting N	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3333	AGM	20/05/2021	Agenda	Annual General Meetings	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Annual General Meeting N	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3333	AGM	21/05/2021	Agenda	Annual General Meetings	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Annual General Meeting N	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3333	BM	20/05/2021	Agenda	Annual General Meetings	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Annual General Meeting N	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3333	AGM	21/05/2021	Minutes	Correspondence	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Annual General Meeting N	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3333	GM	22/05/2021	Minutes	Correspondence	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Annual General Meeting N	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3333	CM	25/05/2021	Agenda	Annual General Meetings	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Annual General Meeting N	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3333	CM	25/05/2021	Minutes	Correspondence	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Annual General Meeting N	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3333	AGM	20/05/2021	Agenda	Annual General Meetings	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Annual General Meeting N	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3333	GM	21/05/2021	Agenda	Annual General Meetings	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Annual General Meeting N	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3333	AGM	20/05/2021	Minutes	Correspondence	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Annual General Meeting N	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## Meeting Reminders

If you are a fan of Strata Master Reminders, there is some good news for you! The Annual General Meetings



Reminder and Meeting Wizard Reminder are both still available for use with StrataVote.

There is no user adjustment required for this to take effect.

For more information on Reminders setup and use, you can review the [Reminders Setup and Use Guide](#) or watch our [Reminders Webinar](#)

22/09/2021 12:29 pm AEST