Meeting Hub | FAQ

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Welcome to our Meeting Hub Frequently Asked Questions article. We've put together answers to the questions we get asked the most. If you have a question that you can't find the answer to, please use the Contact Us option.

Meeting Hub Access

Q. When I open Meeting Hub from StrataMax the email address field does not allow me to enter an email address, why?
A. An email address cannot be entered into this field as Meeting Hub uses the email address setup for each user in Security. Refer to *Set Up Access to Meeting Hub*.

Q. I am receiving a 'server error' when I try and log in to the Meeting Hub, why?
A. This commonly occurs if a user has not been granted security access to the Meeting Hub. Check in ***Security Setup*** to ensure the user has *Standard or Administrator access to Meeting Hub*.

Q. How do I remove access to the Meeting Hub from a staff member that is no longer employed by us?
A. Access is removed for the particular user in ***Security Setup***; adjust Meeting Hub to *No Access*.

Q. Can I use Meeting Hub and BCMax at the same time?
A. Access to BCMax and other modules remains available while Meeting Hub is open, however during certain processes including editing a Word document or during distribution you will need to have Meeting Hub open in one screen and BCMax in the other before starting the process.

Q. How can I get a Voting Register if my office loses connection to the internet?
A. You can log on to the Meeting Hub via the browser on any internet connected device or a device with a hot spot. Navigate to *https://www.stratamax.com.au/OnlineVoting/meetinghub/meeting*, and log in with your *Portal Account*. Select the meeting you wish to obtain the Voting Register for and click on the Voting Register button.

Q. Why are some buildings not appearing in the building selection list?
A. Buildings that are not made available for the StrataMax Portal will not be displayed. Check in Building Information; if 'StrataPay Only' has a tick for 'Yes' as this will be preventing the building displaying.

Q. How do I access Meeting Hub if I have forgotten my password?
A. If you have forgotten your password, this is reset in the same way a User Account is reset. Go to *https://www.stratamax.com.au/Portal/login.aspx* and click *Forgot Password* in the sign in box. Enter your nominated email address and follow the prompts to reset this.

Meeting Hub Test Data

Q. Can I create a dummy building to test with?
A. No, this is not recommended as the Meeting Hub requires uploaded data. We do suggest that Meetings are setup and cancelled using a current active building. This can be done without owners and/or committee viewing the information provided the Meeting Status is not updated to 'Notice Issued'. Any test meetings can be deleted from the Meeting Hub after testing has been completed.

Document Attachment

Q. Can I attach documents to a Standard Meeting such as a Proxy Form rather than using an Attachment Placeholder?
A. Yes under attachments select *Add Document* and select the document required.

Q. Can I attach documents outside of DocMax?
A. Yes; when attaching a document, the DocMax window will open, where the folder containing your documents, can be added.

Q. What order will the attachments display in Merge Letter Attachments?
A. The attachments will display in the order in which they are attached to the meeting items (agenda items and motions). Documents attached to the meeting itself will follow.

Q. Can I attach any file type to the meeting notice or minutes document?
A. It is recommended that attachments are in a .pdf format as this has the highest compatibility and reduced processing time when the notice or minutes document is previewed and sent from the *distribution screen*. Excel documents are not supported.

Numbering Style Format

Q. Why do you recommend only using the number options for motions?
A. When owners cast their votes using VoteMax, the first motion will be numbered after an agenda item and therefore can cause confusion.

Q. We have generated our meeting notice however numbers are not shown in front of the agenda items?
A. Meeting Hub templates that refer to OTS within the name have been designed to only display numbers for motions for the above reason.

Group of Same Issue Motions (QLD)

Q. Why when we change the sort order of motions in a Group of Same Issue Motion does it not hold the changes when saved?
A. Legislation states that motions must be ordered starting with motions that require a resolution without dissent, then special resolution, majority resolution and then ordinary resolution. Meeting Hub will automatically sort motions to cater for this requirement.

Configuring Template Groups

Q. When creating a meeting and selecting *Generate* I am receiving the message 'No Template Groups have been configured for this meeting', what does this mean?
A. *Template Groups* are required to control the formatting of your notices. Scroll to the bottom of the Meeting Details screen, to the *Template Groups section* to add required templates. Please refer to the *Template Groups section* for more info.

Making changes to an issued Meeting Notice or Minutes

Q. I have issued a meeting notice or minutes and realised we have to make some changes, or the status should not have been changed; what can I do?
A. The status of the meeting can be rolled back to the required status such as Created, Agenda Finalised, Meeting Held etc; while the meeting is rolled back to a previous status it will no longer appear available for pre-meeting voting until the status is updated to Notice Issued. Any votes already declared will be retained and will display when the meeting has a status of Notice Issued.

Making formatting changes to a Meeting Notice

Q. I have generated a meeting notice and made some formatting amendments; we had to generate a new notice after adding a motion and now I have lost the formatting changes. What happened?
A. Generating a new notice will supersede (overwrite) the prior version, so any formatting changes will need to be made again.

Q. Why are extra lines appearing under motions when I generate the meeting notice?
A. These lines/spaces are where *Explanatory Notes* and/or *Voting Instructions* would display if they were entered in a motion. A future change is planned to remove blank lines automatically.

Q. Can I change motion wording in the Word document?
A. No, we do not recommend making changes to the Motion in the Word document. If *VoteMax* is being used, any changes in the Word document will not be reflected online. Changes must be made in the Meeting Hub and a new Agenda Generated.

Merge Fields

Q. When does merge field information merge for *Agenda Items* and *Motions*?
A. When first creating a meeting, the merge data is collected for Agenda Items and Motions. For any Motions added at a later stage, the merge data is collected when the Motion is added to the meeting.

Q. Why is the levy data not merging into the motion; we have rolled the levy year and created the new levies?
A. Check to ensure the correct merge fields have been used ensuring if the levies are unstruck, the unstruck levy merge field category was used. The index number is also important as this is used to merge the correct levy

periods information; as an example, when using the Unstruck Category index number 1 would merge the 1st unstruck levy in the Levy Management list for the selected fund, index number 2 would merge the 2nd etc.

If levies have only just been created; it may be due to the data not having synchronized yet; manually upload the building via the *StrataMax Menu* which can be access via the menu or by typing StrataMax into the search bar. Once the building has uploaded, remove the levy motions from the required meeting and then add them back.

Q. When using the *Preview* option for a Standard Meeting the merge field information is not merging, why?
A. The *Preview* option in a Standard Meeting does not merge Motion or Agenda Item content and is designed to show the general layout. To view the merge field information, create a new meeting for any building as a test and delete after testing has been completed.

Meeting Documentation

Q. How can I change my Meeting Documentation (Notice & Minutes) Template?
A. There are two parts to this answer. If you want to change these for a Standard Meeting so that they are applied to new meetings moving forward, you will need to do this in the *Standard Meetings* screen, under the *Template Groups section* at the bottom of the screen. Note that this needs to be done for each Standard Meeting separately.
If you want to change the minutes template on an existing meeting, then the method will vary depending on whether the meeting status has progressed to *Notice Issued* or beyond:

- For meetings that have not progressed to *Notice Issued* or beyond, you will need to make the change at the bottom of the *Meetings Details* screen, in the *Template Groups section*.
- For meetings that have progressed to *Notice Issued* or beyond, you will need to make the change at the bottom of the *Meeting Overview* screen, in the *Template Groups section*.

Q. Can we generate minutes from Meeting Hub if we did not run the meeting using Meeting Hub?
A. Yes documentation can still be produced. However, you will need to update the word document when generated. Alternatively, using Meeting Hub you can replicate what occurred at the meeting by entering attendees, commence the meeting selecting the Chairperson, setting the required meeting start date & time, and then replicating the outcome of each motion (this is best done using the Vote Tally option which simply requires the number of votes to be recorded rather than the votes per attendee).

Meeting Document Distribution

Q. Does Meeting Hub convert the word document to PDF when sent?
A. Yes.

Q. Why is Meeting Hub emailing multiple attachments and not one?
A. A change is planned for future release to enable appending all attachments, so they are sent as one. If you wish to send as a single attachment it is recommended to preview the documents, save and then issue via Merge Letters.

Q. Can I change the email body of the email that sends the Meeting Notice and/or Minutes?
A. Yes, the email body can easily be edited, please refer to the details in the following *article*.

Q. What is the Add to DocMax option for?
A. This option will file a copy of the Merge Letter Cover Letter into DocMax for every lot a Notice or Minutes is issued to and will include how the document was distributed (Printed &/or Emailed). It is important not to select a Profile that will result in the Cover Letters uploading to the StrataMax Portal.

Q. Can I file a full copy of the Notice &/or Minutes including all attachments into DocMax?
A. At the distribution screen tick all documents to be included in the Merge Letters Attachment section (do not include a Cover Letter), then click on Preview. The preview must be saved and then filed into DocMax following usual DocMax filing procedures taking into consideration whether you want the document to upload to the StrataMax Portal.

Q. We are receiving an error during the distribution process after clicking Print/Email; why does this happen?
A. If other word documents are open or opened during the distribution process it may cause the crash due to multiple instances of Word. Therefore, it is recommended to close other Microsoft Word documents prior to clicking on Print/Email and do not open any further Word documents and distribution has successfully completed.

Q. When sending a Vote Outside Committee Meeting notice & / or minutes a copy must be sent to all owners; how do we do this?
A. Automatically in the distribution screen the Recipients will be the 'Meeting Committee Members'; change this to 'Owners' to include everyone. It is recommended to use a cover letter when sending a notice that explains this is for Committee Members only to vote upon.

Meeting Document Distribution | Owner Preferences

Q. Why can't I change the owner's delivery preference?
A. If the *Use Contact Preferences* tick box within the *Meeting Hub Document Distribution* window is ticked; meeting hub observes the *Contact Preferences* for each lot in the ***Roll*** menu. To change email/print selections, select the Mailout Type of custom and then make changes.

Meeting Document Distribution | BING

Q. Does the *Print/Email* function work with BING?
A. Yes, please refer to the details in the following *article*.

Meeting Attendance

Q. How does Meeting Hub determine eligibility or ineligibility to vote for meetings?
A. The system does not decide whether an attendee is eligible to vote for meetings, it recognises that it is the manager’s prerogative to make that decision. However, it will provide alerts to assist the manager in identifying scenarios that may warrant review.

By default, all new attendance records are listed as both ‘Financial’ and ‘Eligible to Vote’ unless ‘Non-Voting Attendee’ is selected in the **Voting Method** field in the *Attendance Register*. In which case they will be considered ineligible to vote and no eligible to vote checkbox option will be offered. Alerts are provided to indicate that an attendee's eligibility to vote may need to be reviewed or their financial status may need to be reviewed but the decision to flag an attendance record as unfinancial or to remove vote eligibility entirely is completely user driven.

Q. How does Meeting Hub determine eligibility or ineligibility to vote for VOCMs (Vote Outside Committee Meeting)? Sometimes a committee member advises us that they have voted however this is not shown on the Meeting Overview page.
A. In accordance with legislation; a voting member must be a lot owner or nominated by a lot. Therefore, if in the office bearer record the Owner of Lot & Nominated by Lot fields are blank at the time of voting the voter will have the Eligible to Vote unticked by default. This can be ticked manually if required and once done the Meeting Overview page will reflect the votes.

Q. Do I need to untick both Financial and Eligible to Vote columns if an owner is Unfinancial for the purposes of the meeting?
A. Do not adjust the eligible to vote flag if the attendee is not eligible to vote because they are unfinancial. If the attendee is unfinancial simply untick the 'Financial' flag instead. This will ensure that if motions are voted on which legislatively require the inclusion of unfinancial votes, the vote calculation results will include the unfinancial votes. If you mark an attendee as ineligible to vote, their votes will always be excluded from vote calculations and tallies.

Q. Why doesn't the delete button appear for an attendance record?
A. If the attendee voted online via VoteMax, you will be unable to delete their attendance record. An attendee that was created by VoteMax will have a voting method of 'VoteMax Pre-Meeting'.

Q. I have someone attending the meeting for a lot they own and as a proxy for another lot; do I need to add them multiple times?
A. One attendance record should be created with two capacities; load the attendee details ensuring the Capacity Type is set to Owner then click on Add Additional Capacity and select Proxy then enter the lot or lots the proxy holder is representing.

Q. I need to enter a Proxy Holder; how is this done?
A. Proxy holders are added to the attendee list, select the capacity of 'Proxy' when adding the individual.

VoteMax

Q. How do owners access VoteMax?
A. Owners can simply access VoteMax via the *StrataMax Portal*.

Q. Can owners use their mobile phone to access VoteMax?
A. Yes, VoteMax is mobile responsive.

Q. Why do owners have to login to cast my vote? Can't they just click a link?
A. We have chosen to only allow votes from users who have logged into the portal with a username and password. It was decided that this was a more secure method in validating that a vote had been cast correctly than clicking on a link. It also prevents proxy farming of votes which is not allowed under the legislation in many states. A link may easily be forwarded to someone who is proxy farming and thus may have control of far more votes than is allowed under the law. It is unlikely that a user would provide their personal account username and password details to a third party.

Q. Why are owners not seeing the Committee Election to vote on?
A. To enable a *Committee Election* in VoteMax, a tick box called *Enable Committee Election Voting* needs to be

enabled. This is located in the Meeting Details screen, under the VoteMax Settings section, which you can read more about *here*.

Q. I have distributed the notice to the owners, so why can they not see the meeting or ballot in VoteMax?
A. The meeting status must be progressed to *'Notice Issued'* by clicking the *Update to Notice Issued* button in the *Meeting Details* screen. The meeting will then move to the Active meetings in the Meetings screen. Have a look at the *Meeting Overview* article to learn more the different meeting stages.

Q. I have created a meeting with motions for owners to cast their votes, but when I log into the Portal and use the 'View As Owner' function, I cannot see the VoteMax tab.
A. This is by design. *The VoteMax tab* is only visible to actual owners.

Q. Can owners change their vote if they have already declared them and if so what do we need to do?
A. Owners can change their votes at any time if it is within the voting window period; as a manager you do not need to do anything. Instructions for an owner are available *here*.

Q. If an owner doesn't vote for a motion on VoteMax how is this recorded in Meeting Hub?
A. The vote/s is recorded as Abstain. When the owner votes, if they do not vote for a motion when submitting votes, a message appears stating 'You have not cast a vote on all motions, missing votes will be counted as abstentions. Would you like to proceed?'.

Q. How do we determine when an owner voted via VoteMax?
A. From within the meeting select Manage Attendance; click on the icon in the *View Vote* column to view an attendee's votes. If the icon does not appear, this means no votes have been recorded. The date and time will be displayed for when the owner declared their votes.

VoteMax in Meeting Voting

Q. How do owners access VoteMax in Meeting Voting?
A. Owners can simply access VoteMax via the *StrataMax Portal*.

Q. If we plan to use VoteMax in Meeting Voting; is there anything we should consider?
A. As owners would log onto the StrataMax Portal to vote; it is recommended to use the cover letter and or email templates to advise owners of how to vote and to recommend portal accounts are setup prior to the meeting.

Q. How can we check what owners have a StrataMax Portal account and if they do what email address/s are used?
A. Managers and team members should have their own StrataMax Portal account. Log onto the StrataMax Portal and use the *Owner View function* to check.

Offline Voting Register

Q. We have downloaded the voting register however some of the data is not displaying in the cells?
A. The Offline Voting Register is a Microsoft Excel Spreadsheet. If your implementation of Excel has 'Protected View' settings applied in the 'Trust Center' settings (recommended for security purposes), the offline voting register will always require you to 'Enable Editing' before use. Note: Some of the downloaded data will not be displayed in the spreadsheet until you 'Enable editing'.

Q. We are printing the voting register however it has printed 20 plus pages; why is this?
A. The offline voting register is designed to be used in a meeting with votes being recorded in Excel. If you want to print the voting register, it is recommended to set the required print area; information is available *here*.

Proxy Voting

Q. What would proxy holders do?
A. Proxy voting is not currently supported via the Meeting Hub or VoteMax, this would need to be managed by your office.

In Meeting Functions

Q. Can meeting hub determine the outcome of a motion based on entitlements?
A. On the required motion, select Open Voting and then change the Vote Calculation Type from Standard to Poll. When the votes are submitted the Motion Outcome Screen will provide a summary of results based on the count of entitlements. The Vote Calculation Type of Poll is not available if entering votes using the Vote Tally option.

Meeting Hub & VoteMax Enhancements

Q. Are there more features for Meeting Hub being developed?
A. Enhancements are continuously being worked on by the development team here at MaxSoft. We aim to update Meeting Hub at least once a month, but often more. Please check the *Meeting Hub Release Notes page* from time to time if you would like to stay up-to-date with Meeting Hub releases and updates.