

TRAINING REFERENCES

Meeting Wizard

Use Meeting Wizard to:

- ✓ Streamline your meetings
- ✓ As a checklist to ensure you complete everything required before and after meetings
- ✓ Issue notice and minutes quickly

Meeting Wizard requires a one time set up. Set default templates for your Agendas and Minutes so that you don't need to create documents or edit existing ones each time you issue these.

Use the Meeting Wizard to issue Meeting notices and Minutes for all corporations and meetings.



One time set up:
Meeting Wizard &
Templates



Book
Meeting



Issue
Agenda



Sync to
MEETING
Master



Run
Meeting



Sync from
MEETING
Master



Issue
Minutes

Template setup

To create templates for use in Meeting Wizard go to:

1. Configure > Association Types > Strata Plan
 2. At the Agenda/Minutes Setup section click on the Meeting type that you wish to create a template for
 3. Edit the Template
 4. Click on Save in the toolbar to save your template
- See the [Rockend Knowledgebase](#) for more information. Scroll down to Template Configuration for more information.

MEETING Master

Use the MEETING Master app to run your meetings from a tablet and sync the information back to STRATA Master. MEETING Master allows you to quickly & easily update your meetings and issue minutes.

Configure MEETING Master via Communicator, go to:

1. Configure > Communicator Configurations
2. Go to the MEETING Master tab
3. You will need your Portal Key to complete the configuration

Meeting Wizard Setup

To configure the Meeting Wizard, go to:

1. Configure > Meeting Wizard > Agency
2. Select the Meeting type from the dropdown list
3. Set your task list in the box on the right hand side
 - Highlight tasks to edit or remove from list
 - Use the arrow keys in the centre to remove any tasks
 - Use the green arrows to change the order of tasks
 - Use the green + symbols to add customised tasks to the list
4. Click on the Save button on the toolbar to save your changes
5. Repeat for each meeting type

For more information on Meeting Wizard, see the [Set up & Use Guide](#) on the Rockend Knowledgebase.



Download the MEETING Master App for iOS or Android

See the Knowledgebase for more information on [STRATA Master and MEETING Master integration](#).