Task Management

Last Modified on 09/11/2026 9:18 am AEST



This article covers an overview of the Task Management interface and the various options, functions, and buttons available. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

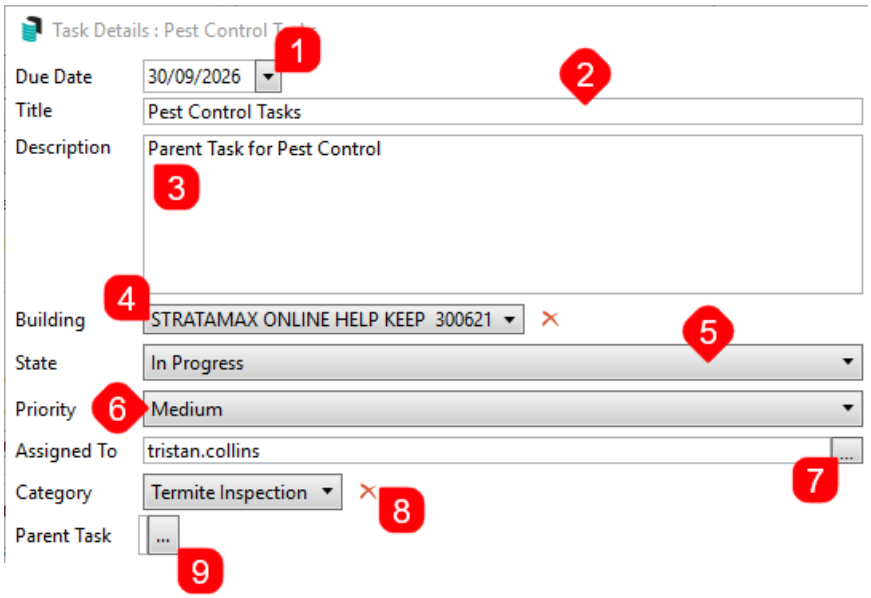
The Task Management screen provides users with the tools to efficiently manage the varying tasks associated with strata management, ensuring nothing is missed. Tasks can be associated with a building; where not associated to a building the task is considered an office task.

Task Management | Task Details Overview

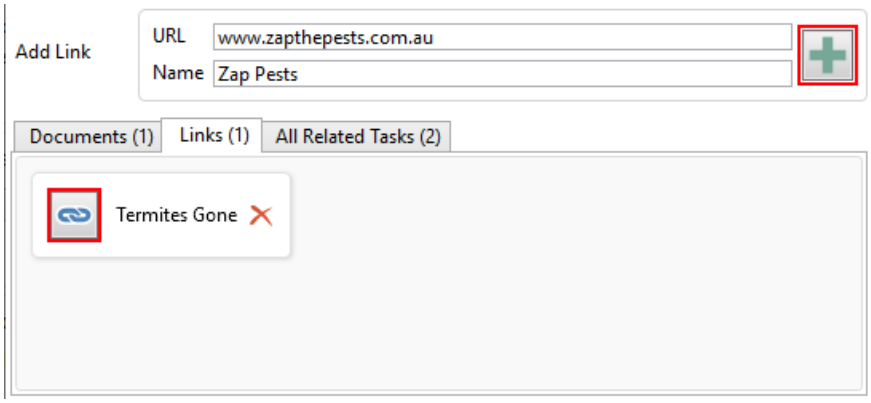
This section provides an explanation of fields & functions available in the Task Details window, which appears when the user creates a new task or opens an existing task.

1. Due Date: The date the task is due.
2. Title: Used to identify the task name, and is also used by the search field in the main Task Management screen.
3. Description: Additional text to provide a more detailed explanation of the task, and is also used by the search field in the main Task Management screen.
4. Building: The building the task relates to. If it's left blank, the task is considered an office task. This is also used by the search field in the main Task Management screen. Remove the building selection by clicking the red X.
5. State: A drop-down menu to help manage the various states of a task. Available for selection are Not Started, In Progress, Blocked, Abandoned and Complete. The state of a task can be updated manually or by drag and dropping a task to a different column in the Kanban view.
6. Priority: A pick-list to assist with managing the urgency of a tack. Available for select are Low, Medium and High.
7. Assigned To: A pick-list of users & user groups from StrataMax security. Tasks can be reassigned whenever required.
8. Category: A picklist that can be managed via the Categories button to assist in grouping tasks such as Maintenance, Correspondence, Procedures.

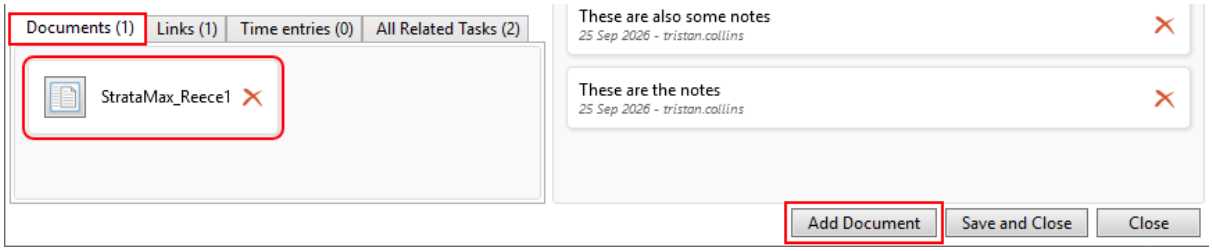
9. Parent Task: Use this ellipsis button to select a *Parent* task to assign this task to, which turns this task into a child task.



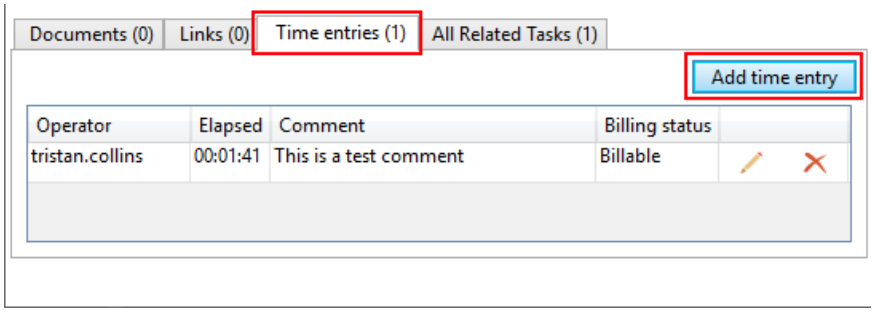
10. Add Link: URL & file links can be added to provide quick access to information, procedures etc. Multiple links can be added along with a name for easy identification. To add a link, type or paste the website URL or the file path into the URL field, then type a name, and click the green plus button. Once added, any links will appear in the *Links* tab where they can be clicked to open them.



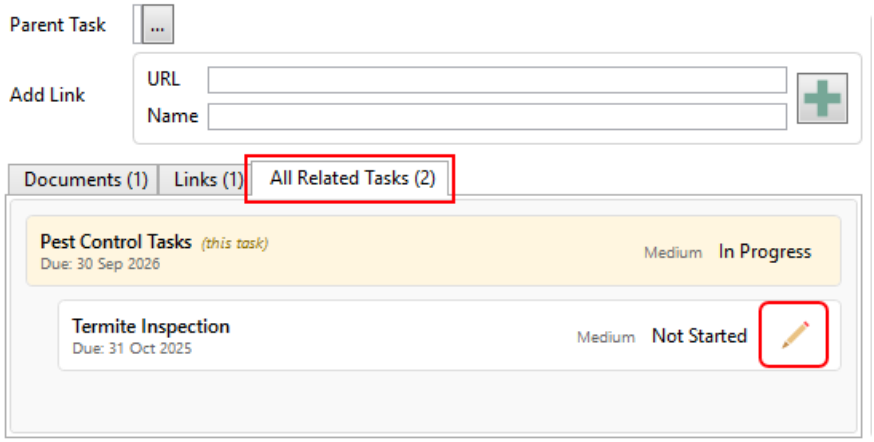
11. Documents / Add Document: The Documents tab will display any documents that have been added to this task. Open the document by clicking the icon to the left of the name. To remove the document from this task, click the red X button to the right of the name. To add documents, click the *Add Document* button in the bottom right of the Task Details window and locate the document from the ***DocMax*** Select Document window.



12. Time Entries: Where time entries for this specific task are managed and added. See *Timed Tasks* further below in this article for more details.



13. All Related Tasks: Displays any *Parent* or *Child* tasks associated with this task. Related tasks can be opened by clicking the *Pencil* icon. See *Task Management | Child Task* for more info.



14. Checklist: For tasks that may require multiple action points, items can be added to the checklist and marked completed individually. Once all items in a checklist are marked as complete; the task state will update to Complete also.
    - Checklist items cannot be edited, so if there is a typo or mistake, the checklist item needs to be deleted by clicking the red X and then added as a new checklist item.
15. Notes: Notes can be added to a task to help capture important information throughout its life cycle.

These will present with a date and username on them.

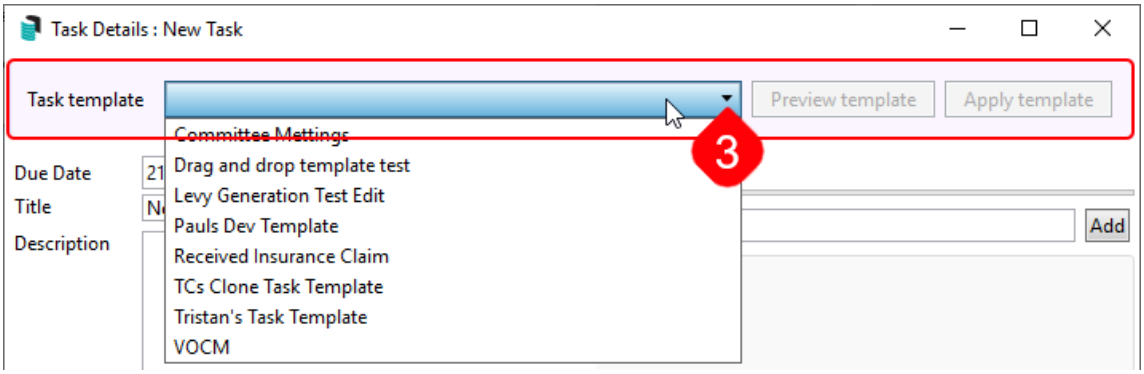
- Notes cannot be edited, so if there is a typo or mistake, the note needs to be deleted by clicking the red X and then added as a new Note.

16. Save and Close: Click to save the new task or any changes and close the*Task Details* window.
17. Close: Click to close the *Task Details* window without saving.

Create a New Task

To create a new task, including applying a Task Template, follow the below steps:

1. Open ***Task Management.***
2. Click on the *Add Task* button.
   - When in Calendar view, the user can double click within a date to create a new task or open an existing task.
3. To apply a Task Template, select one from the *Task template* drop-down menu, then (optionally) click the *Preview template* button if required, then click the *Apply template* button.
   - See *Task Automations | Task Templates*for info on how to create and manage Task Templates.



4. Enter or change any information required in the task as per the*Task Details Overview* section above for an explanation of the various settings and fields.
5. Click *Save and Close*.

Edit/Update a Task

This section describes how to edit / update a task. A task can also have the state updated by drag and dropping it to a different column in the Kanban view.

1. Open ***Task Management.***

2. Locate the required task and double click to open it.
3. Update information as required as per the *Task Details Overview* section above for an explanation of the various settings and fields.
4. Click *Save and Close*.

Delete a Task

This section describes how to delete a task, which cannot be undone.

1. Open ***Task Management.***
2. Locate and select the required task.
3. Click the *Delete Selected* button.

Task Management | Interface

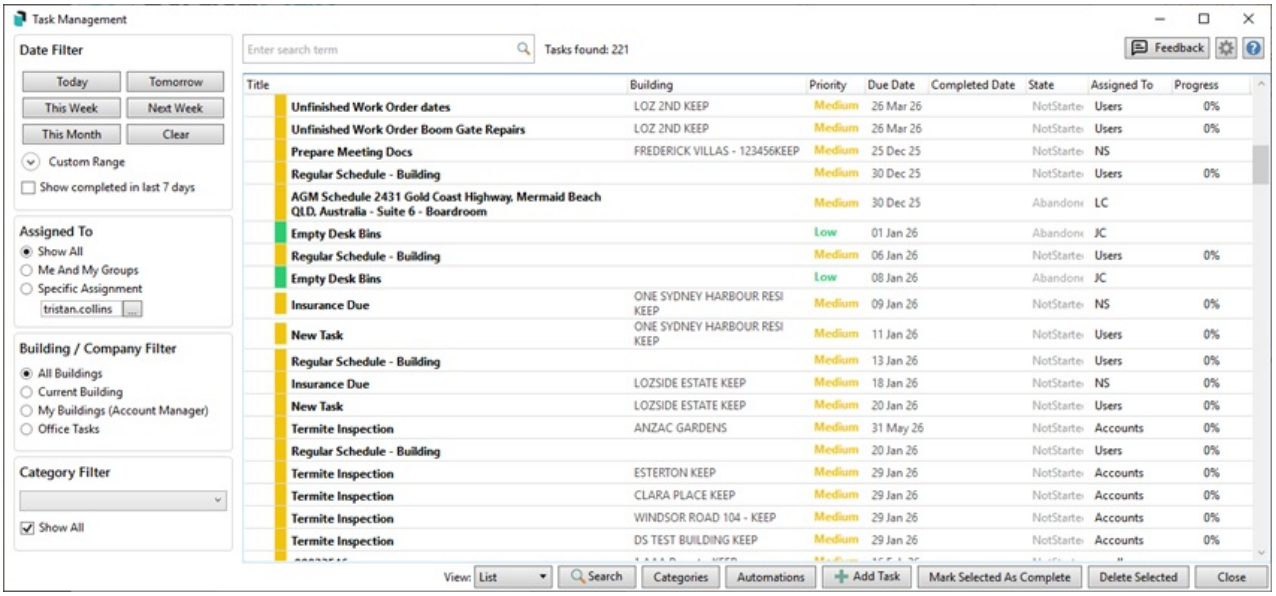
There are three views available in the Task Management screen, and there is also the ***Search Tasks*** screen, which can be used to access all tasks, report / export tasks, and create ***Dashboard*** items, etc. Each user can set their desired default view in the *Configuration* window.

List View

By default, the list view displays tasks in *Due Date* order and can be changed by clicking on the column headers. To open a task, simply double-click it. The percentage number in the Progress column observes the Checklist Items within the task.

A search bar is available above the list and will search the task Title, Description, and Building.

The colour of a task indicates the priority, which is set in the Task Details screen; these can be Low (green), Medium (yellow), or High (red).



Kanban View

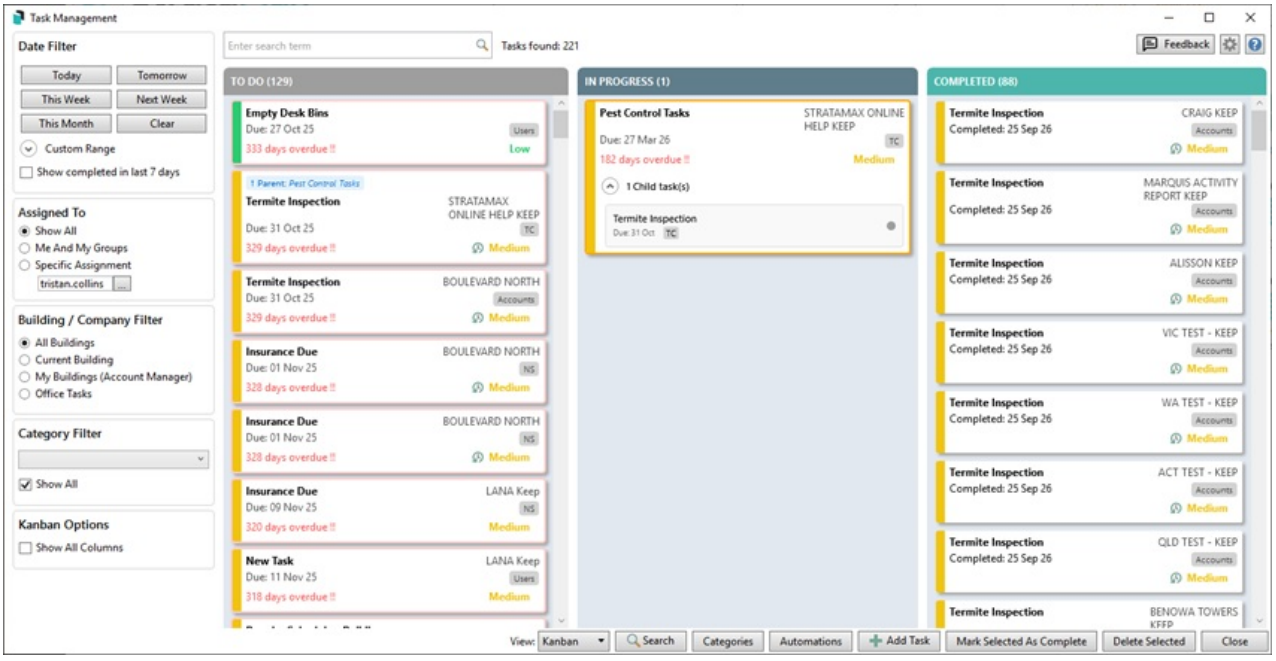
The kanban view displays tasks in columns based on the state field. Additional columns of Abandoned and Blocked can be included if the setting is ticked under Kanban Options within the Kanban view or if 'Show Extra Board Columns' is ticked in the *Configuration* window.

A search bar is available above the list and will search the task Title, Description, and Building.

The colour of a task indicates the priority, which is set in the Task Details screen; these can be Low (green), Medium (yellow), or High (red).

Tasks can be dragged from one column to another which will update the state of the task based on where it is dropped, and to open a task double click on it.

Tasks in this view will also indicate if they are a*Parent* task, and have any *Child* tasks within, and if they belong to a *Parent task.*



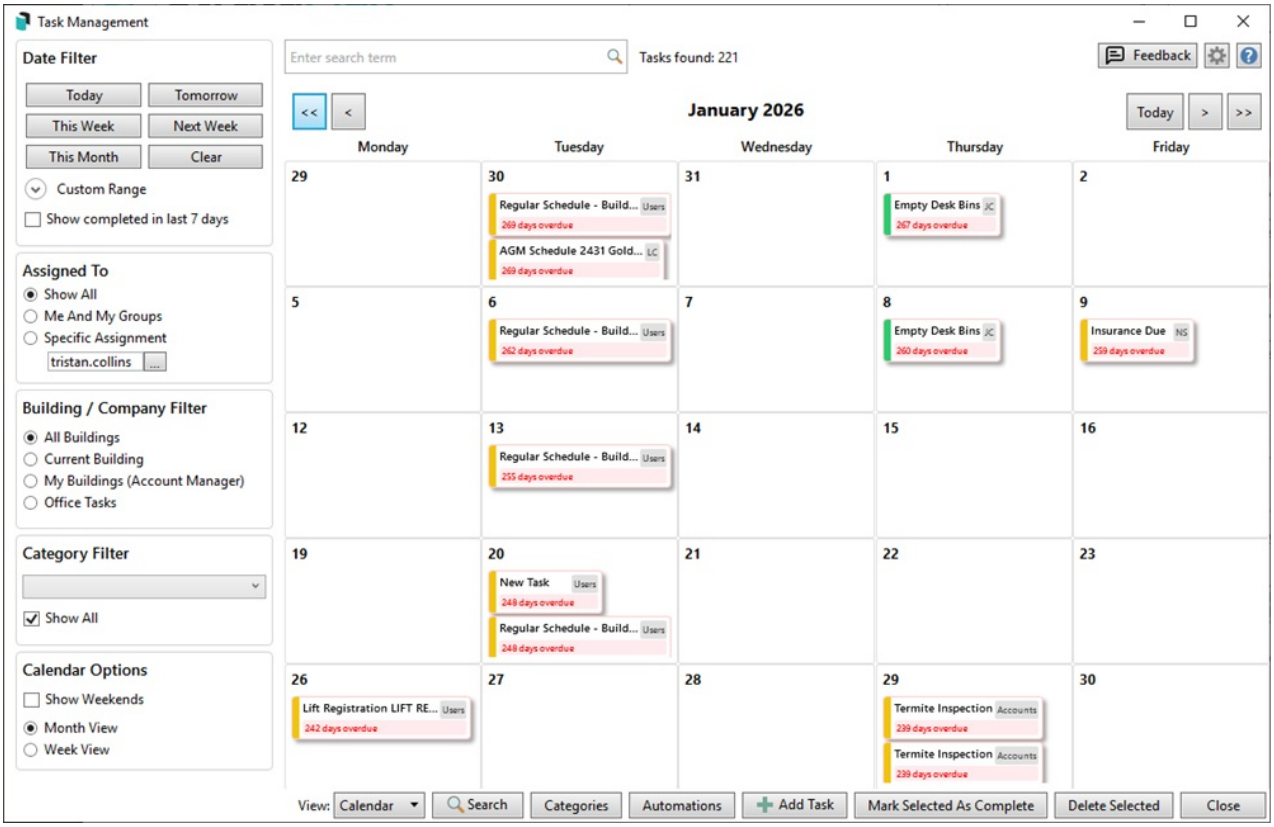
Calendar View

The calendar view allows users to see tasks within a monthly or weekly view, with additional configuration available to show / hide weekends.

A search bar is available above the list and will search the task Title, Description, and Building.

When in Calendar view, the user can double click within a date to create a new task or open an existing task.

The colour of a task indicates the priority, which is set in the Task Details screen; these can be Low (green), Medium (yellow), or High (red).



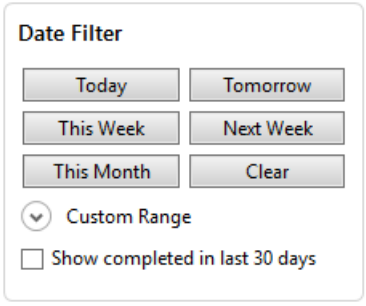
Task Management | Filters

The filters available in Task Management remain the same regardless of whether using the Kanban, List or Calendar views. The filters are used to manage what tasks will display.

Date Filter

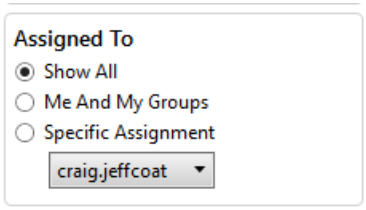
By default, no date filters are automatically applied. To limit tasks displayed, select from the quick date filters or set a custom date range.

Tick *Show completed in last XX days*to include completed tasks within the set number of days. The number of days displayed in this setting is based on the number set in the *Configuration*. Tasks that have been completed will show with a line through them.



Assigned To

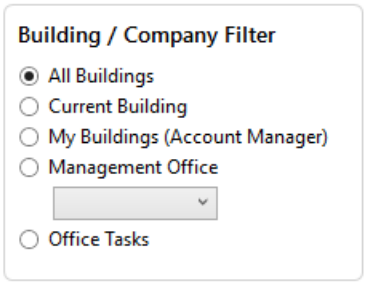
By default the assigned is set to your username. Select either other users or user groups to view tasks assigned to them. To view tasks assigned to all users & user groups tick *Show All*. To view tasks assigned to your username of security groups you are a member of, select *Me and my groups*.



Building / Company Filter

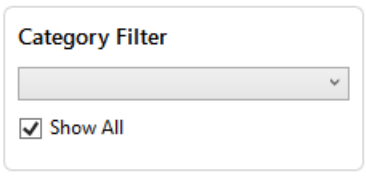
By default *All Buildings* is set when opening Task Management, but other filters can be selected.

- All Buildings will display tasks for all active buildings.
- Current Building will display tasks for the currently selected building.
- My Buildings (Account Manager) will display for the users buildings where they are set as the Account Manager. The user name must be linked to the Account Manager in ***Account Manager Edit***.
- Management Office can be selected if the ***Management Office*** function is being used in StrataMax. Once ticked, select the required Management Office to view the tasks for the buildings associated with the selected Management Office.
- Office Tasks can be ticked to display Office Tasks, that are not associated with a building.



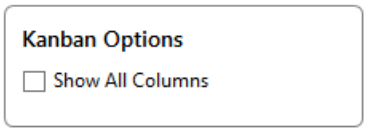
Category Filter

By default no category is selected. To filter by a specific category, untick*Show All* and select the required category.



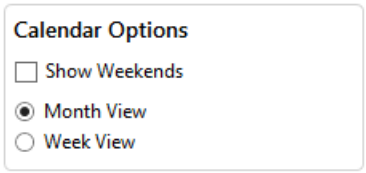
Kanban Options (only displayed in Kanban view)

Tick *Show All Columns* to include any tasks with the state of Abandoned and Blocked.



Calendar Options (only displayed in Calendar view)

- Show Weekends can be ticked to display weekend days within the calendar.
- Month View and Week View can be selected to view the calendar as either monthly or weekly.

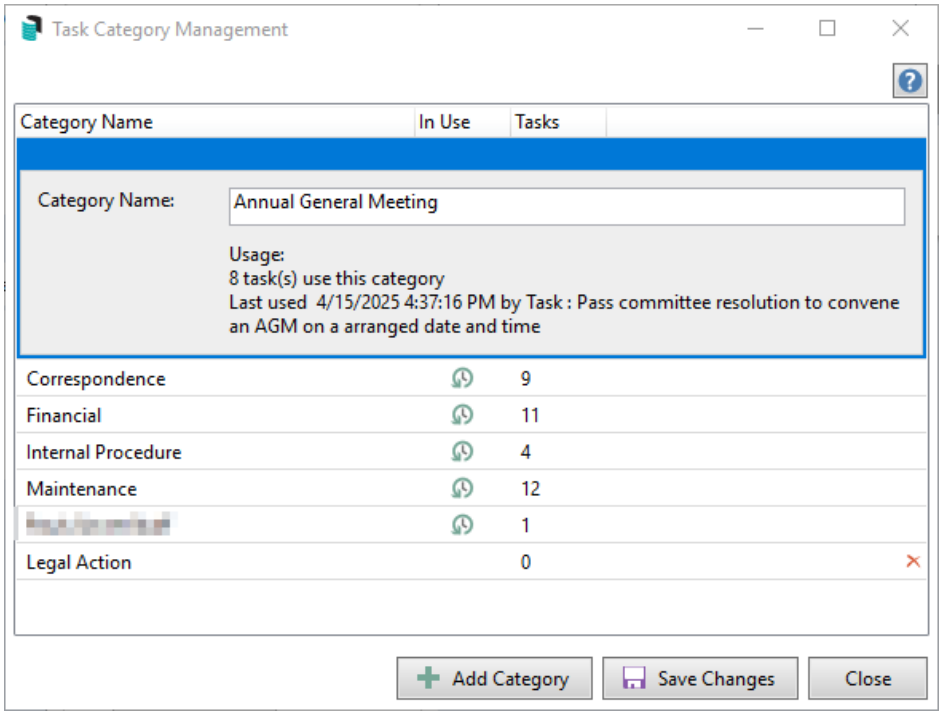


Task Management | Categories

Categories can be assigned to tasks to assist with grouping them, whether it be via filters, searching, reports, or ***Dashboard*** items.

- To add a new category, select *Add Category*.
- To edit a category, change the Category Name and select Save Changes.

> Categories are not able to be deleted if they have been used for a task.



Task Management | Child Tasks

This section covers the topic of *Child Tasks* in the Task Management screen. Child Tasks allow a main or *Parent* task to be broken down into multiple activities that can be assigned to different users and completed on different dates.

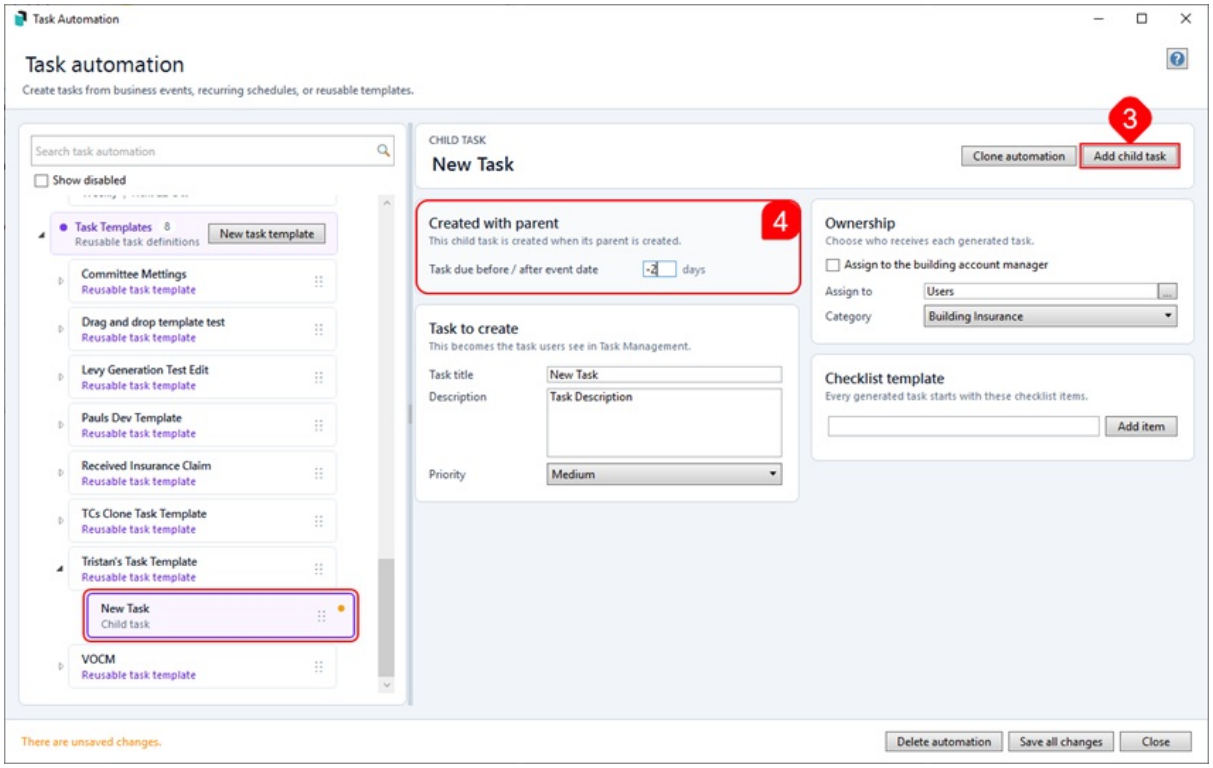
Child Tasks can be created within any type of Automation. Child Tasks can also contain additional Child Tasks, creating multi-level task structures for complex workflows.

Add a Child Task to an Automation

This section explains how to add a child task to an automation. This can be done whilst setting up a new automation or retrospectively to an existing automation. Child tasks can also be added to existing child tasks, creating multiple of layers of tasks and sub-tasks.

Note that when a child task is added to any existing task automation, any tasks that have already been created based on the automation, will not add the new child tasks.

1. Search or select ***Task Management*** and click the *Automations* button.
2. In the Task Automation window, expand the relevant automation section or use the search field to locate and select the automation required.
3. Click the *Add child task* button and the new child task will immediately appear slightly indented, under the existing task with the *Task title* 'New Task.'



4. The unique field in a child task is in the **Created with parent** section, called *Task due before/after event date.* This figure will be number of days the child task is due relative to the due date of its parent task.
    - A positive number will result in the child task being due that number of days after the due date of the parent task.
    - A zero will result in the child task being due on the same date as the parent task.
    - A negative number will result in the child task being due that number of days before the due date of the parent task.
5. For guidance and information on the rest of the fields and options, see *Task Management | Creating New Automations*.
6. The Click the *Save all changes* button.

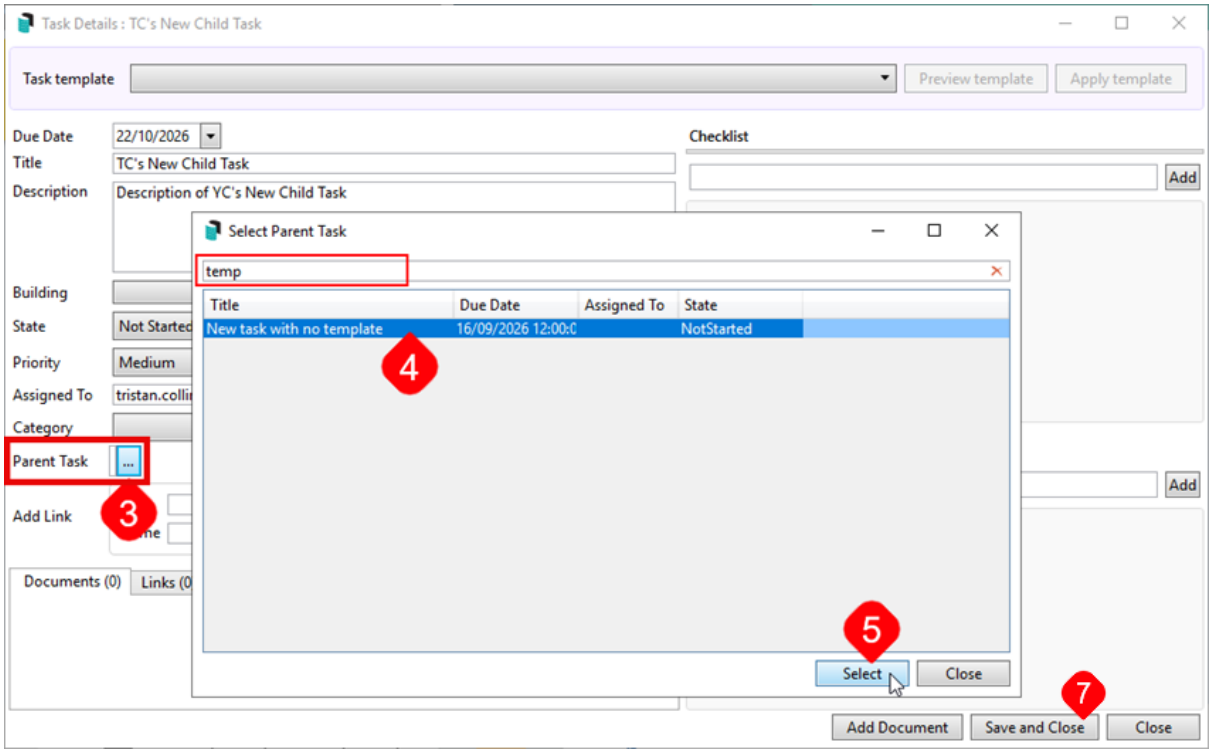
Add a Child Task to an Existing Task

This section explains how to add a child task to an existing task. This can be done whilst adding a new task, or it can be done retrospectively to an existing task. Rather than creating a child task inside an existing/parent task per se, a task needs to be assigned to another existing/parent task.

1. Search or select ***Task Management.***
2. Either follow the process to *Create a New Task*, or select an existing task that will become the child task.
3. The field to note is the *Parent Task* field. Click the ellipsis button and the 'Select Parent Task' window will open.
4. Use the *Search* field to locate the required task, or scroll and select the task that will become the

parent task.

5. Click the *Select* button and the 'Select Parent Task' window will close, with the *Parent Task* field now populated.



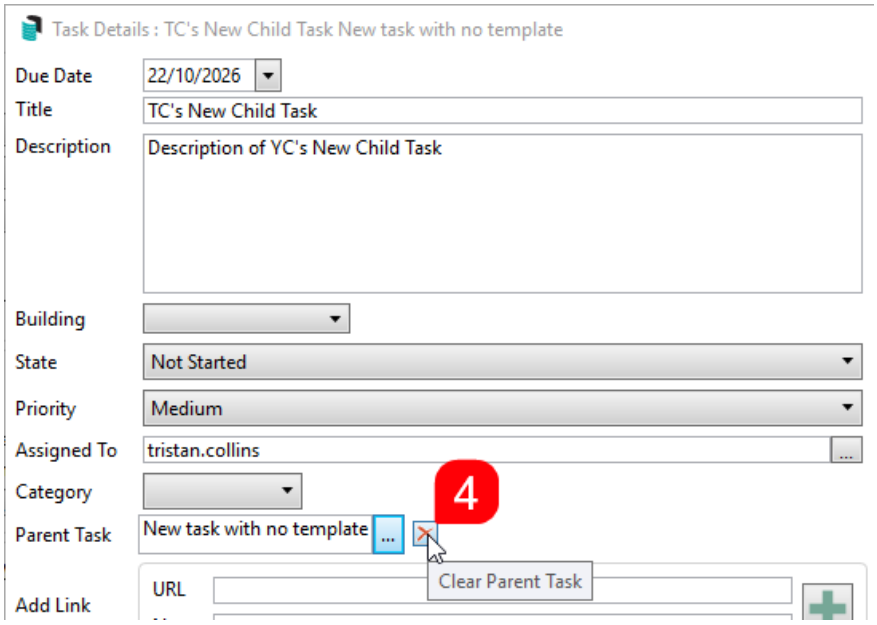
6. Add any remaining details and configure any other fields or options.
7. Click the *Save and Close* button.

Reassign or Remove a Child Task from an Existing Task

This section explains how to replace or remove a child task from an existing task. This can be done whilst adding a new task, or it can be done retrospectively to an existing task. Rather than removing a child task from an existing/parent, a child task needs to have the assigned parent task changed or removed from within the child task's 'Task Details' window.

1. Search or select ***Task Management.***
2. Locate and open the child task so the 'Task Details' window opens.
3. If the child task needs to be assigned to a different parent task...
    - Click the ellipsis button next to the *Parent Task* field, and the 'Select Parent Task' window will open.
    - Use the *Search* field to locate the required task or scroll and select the task that will become the parent task.
    - Click the *Select* button and the 'Select Parent Task' window will close, with the new *Parent Task assigned.*

4. To remove the parent task, click the red X to the right of the ellipsis button next to the *Parent Task* field.



Task Management | Automations

The 'Task automation' screen is where users can manage the three different types of Task Automations, which are *Events, Schedules,* and *Task Templates*. Each section and item can be expanded using the arrow beside the heading to display their automation items or their child tasks. Users can also clone existing automations from this screen, as well as create *Child Tasks* for each of these *Automation* types.

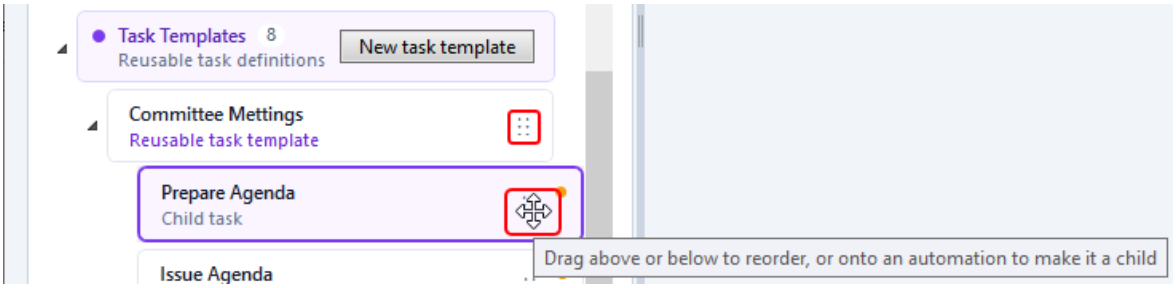
The *Automations* button has a permission associated to it in ***Security Setup***, which is called 'Manage Automations'. If the *Automations* button is inactive for a specific user, check this permission and ensure it is set to 'Allow' or is inheriting from a parent permission that grants access.

Here are some key features and functions within the 'Task automation' screen.

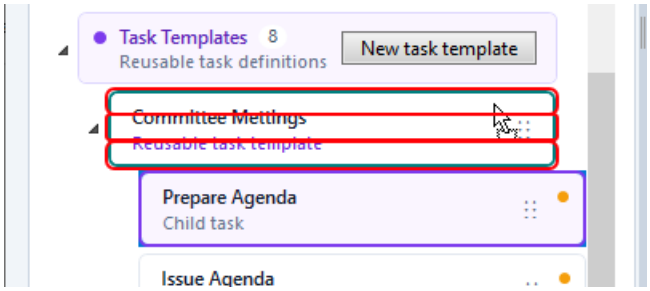
- The search field can be used to search anywhere in the automation name, including child tasks.
- Ticking the *Show disabled* box will display automations that have been disabled by removing the tick in their *Enabled* box.
- Drag & Drop support so automations can be reordered or moved to other automations of the same type. This can be used to convert a child task to a top-level automation of the same type.
- Cloning an automation is essentially creating a copy of it.
- A child task is designed to be a way of breaking down a larger, overarching task into a number of tasks that belong to the overall or Parent Task. These child tasks can be created within all three Automation types and can be assigned to different users and completed on different dates.

Task Automations | Drag & Drop and Reordering

Drag & Drop support allows users to reorder or move automations and child tasks to other automations of the same type. This can be used to convert a child task to a top-level automation of the same type, or to add multiple layers of sub-child tasks.



Select the drag handle (six small dots to the right of the item) > Hold down the mouse button > Drag the automation to the required position.



When releasing the mouse button, it's important to be aware of where the mouse cursor is in the automation item, as this impacts the outcome of the dragging & dropping.

- Dropping it to the top zone of a child task will place the item above it. Whilst dropping it in the top zone of main or parent task, will move it out of the parent task and essentially convert it to an automation of the same type.
- Dropping it to the bottom zone of a child task will place the task below it. Whilst dropping it in the bottom zone of main or parent task, will move it out of the parent automation and essentially convert it to a separate automation of the same type.
- Dropping it into the centre zone will place the automation or child task inside that item as a child task. If dropped into an existing child task, it creates a sub-child task.

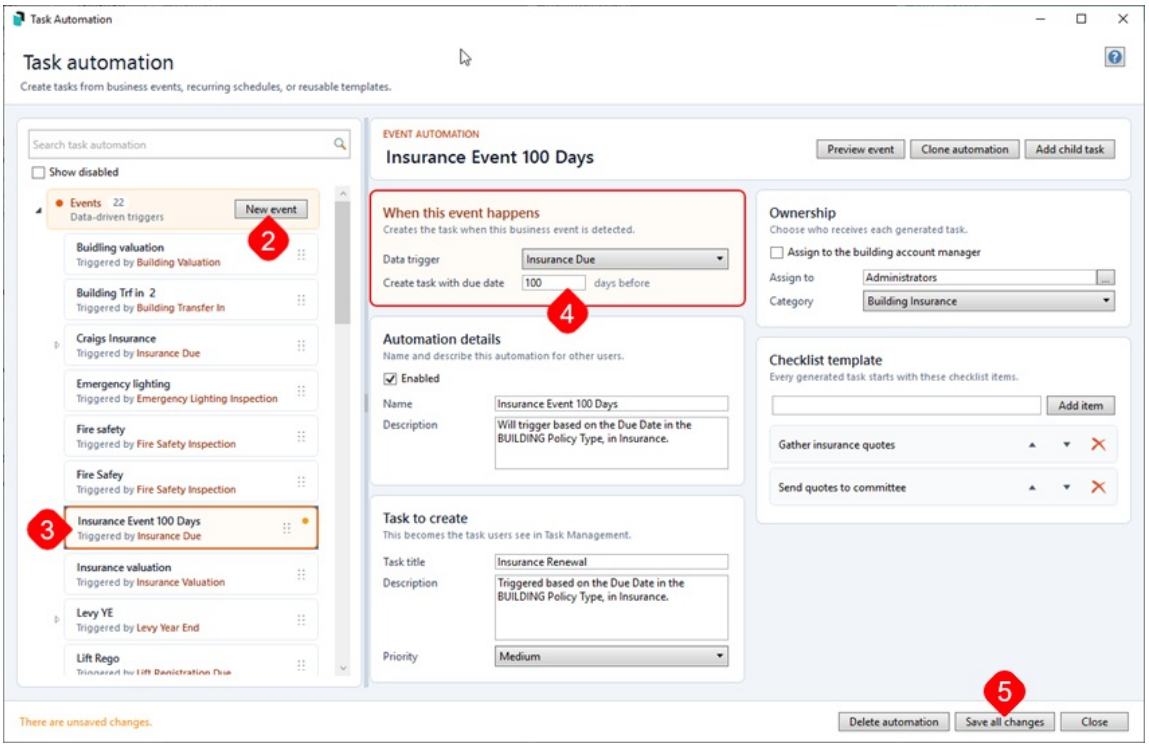
Task Automations | Events

Event Automations observe various data triggers, which are spread out through different areas in StrataMax. Once they have been set up (and enabled), they are created for the upcoming dates based

on the number entered into the 'Create Task with due date X days before.' Any Events are checked and created daily using the StrataMax scheduler.

Create Task Events

1. Search or select ***Task Management*** and click the *Automations* button.
2. In the Task Automation window, click the *New event* button on the left side.
3. The cursor immediately highlights the *Name* field, so a new name can be entered, and the Task Event will be placed in alphabetical order in the list of Events on the left.
4. The only unique fields in Events are located in the orange 'When this event happens' section.
    - The *Data trigger* is a drop-down menu to select from a series of event types that happen throughout StrataMax. Refer to the table below for an explanation of each of these events.
    - The number entered into *Create task with due date X days before* means the task created from this Event Automation will be due that number of days before the event occurs. For example, if *Insurance Due* is selected and '30' is entered into the field, a task will be created with a *Due Date* 30 days before the *Due Date* in the *BUILDING* policy type in the ***Insurance*** screen.



5. After the remaining fields have been completed and options configured, click the *Save all changes* button in the bottom right.
    - For guidance and information on the rest of the fields and options, see *Task Management | Creating New Automations*.

An event date can have multiple tasks automatically created if required. Data Triggers for Event

Automations that are currently available for selection include:

Task Management Event Type	Area	Data Source
Annual Fire Safety	***Inspections***	Default Inspection Type - Annual Fire Safety Statement
Asbestos	***Inspections***	Default Inspection Type - Asbestos
Back Flow Testing	***Inspections***	Default Inspection Type - Backflow Testing
Building Transfer In	***Transfer In/Out***	Earliest Date of Transfer. This also contains a default checklist for common tasks that are recommended to be completed.
Building Valuation	***Inspections***	Default Inspection Type - Building Valuation
Building Year End	***Building Information***	Financial Year End
Contract Expiry	***Contracts Register***	Expiry Date
Contract Increase Due	***Contracts Register***	Increase Due
Contract Next Option Due	***Contracts Register***	Next Option Renewal Date
Emergency Lighting Inspection	***Inspections***	Default Inspection Type - Emergency Lighting (Next Planned field)
Fire Safety Inspection	***Inspections***	Default Inspection Type - Fire Safety Report (Next Planned field)
First AGM	***Building Information***	Meeting Type - First Annual General Meeting
Gates	***Inspections***	Default Inspection Type - Gates (Next Planned field)
Gutter Cleaning	***Inspections***	Default Inspection Type - Gutter Cleaning (Next Planned field)
Health and Safety Inspection	***Inspections***	Default Inspection Type - Workplace H & S (Next Planned field)
Insurance Due	***Insurance***	Building Type - Due Date
Insurance Valuation	***Inspections***	Default Inspection Type - Insurance Valuation (Next Planned field)
Levy Year End	***Building Information***	Levy Year/AGM
Lift Registration Due	***Inspections***	Default Inspections Type - Lift Registration (Next Planned field)

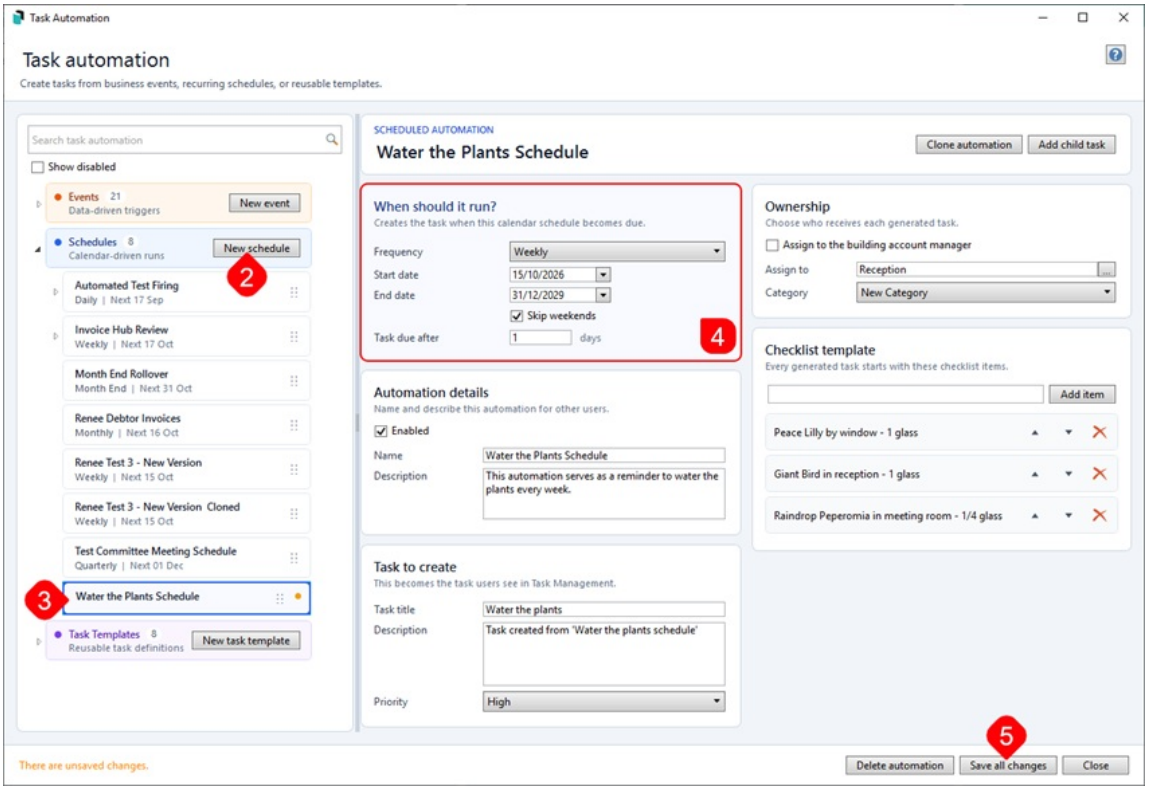
Next AGM	***Building Information***	Meeting Type - Annual General Meeting
Next General Meeting	***Building Information***	Meeting Type - General Meetings
Next Sinking Fund Report Due	***Inspections***	Default Inspection Type - Sinking Fund Report (Next Planned field)
Painting	***Inspections***	Default Inspection Type - Painting
Pest Control	***Inspections***	Default Inspection Type - Pest Control
Pool Safety	***Inspections***	Default Inspection Type - Pool Safety (Next Planned field)
Switchboard	***Inspections***	Default Inspection Type - Switchboard
Termite Inspection	***Inspections***	Default Inspection Type - Termite (Next Planned field)
Unfinished Work Order	***TaskMax***	Description: Contractor and Finish Date; Due Date is the Notice Before Due; Title: Work Order Subject

Task Automations | Schedules

Schedules are designed to create tasks based on frequency and dates, which are set by the user. Once a *Task Schedule* has been created in ***Task Management***, the backend system runs an automatic daily check, which creates new tasks based on the Task Schedules that have been set up. This daily check is managed by the StrataMax Support team and cannot be altered by users.

Create Task Schedules

1. Search or select ***Task Management*** and click the *Automations* button.
2. In the Task Automation window, click the *New schedule* button on the left side.
3. The cursor immediately highlights the *Name* field, so a new name can be entered, and the Task Schedule will be placed in alphabetical order in the list of Schedules on the left.
4. The only unique fields in Schedules are located in the blue 'When should it run?' section.
    - Frequency can be selected from the drop-down menu, and is hard-coded, so cannot be changed.
    - Select the Start date and End date
    - Optionally, tick the *Skip weekends* box if the tasks should only be created on business days.
    - Enter a number in the *Task due after X days* field. The system will automatically apply a due date based on this number when a task is created using this schedule.



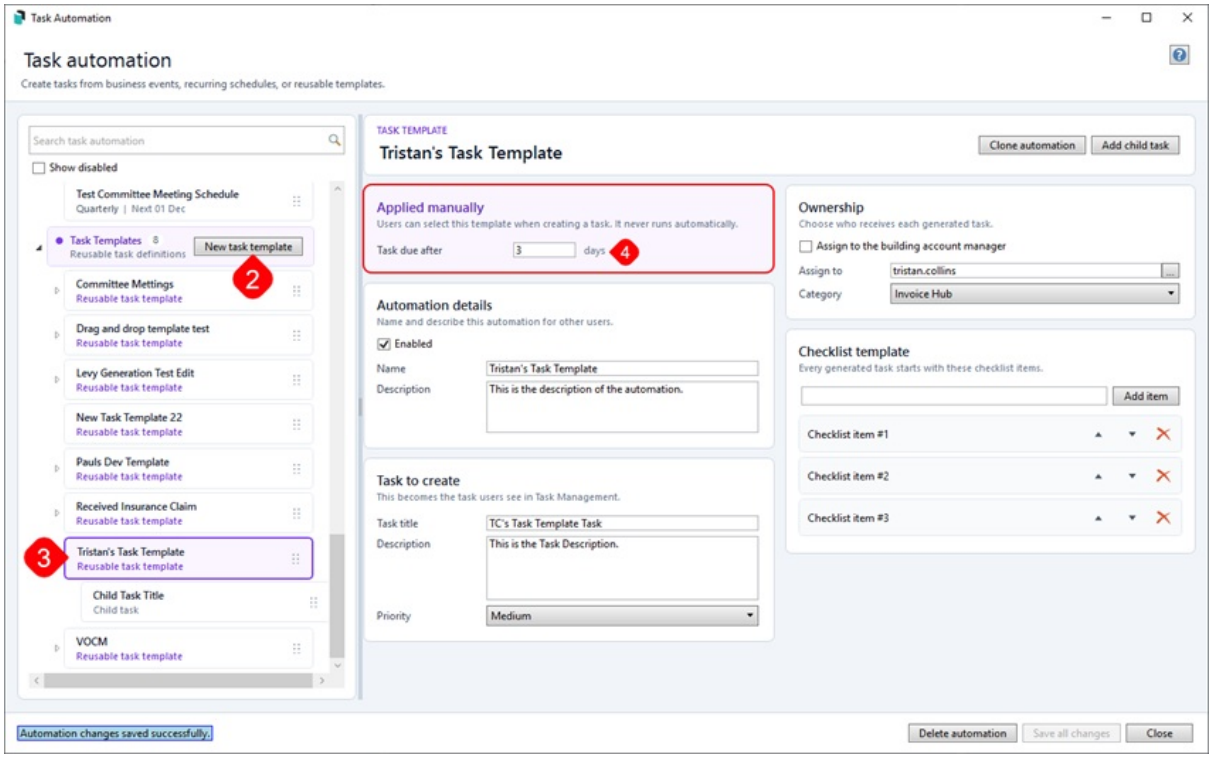
5. Once all other fields have been completed and options configured, click the *Save all changes* button in the bottom right.
    - For guidance and information on the rest of the fields and options, see *Task Management | Creating New Automations*.

Task Automations | Task Templates

Task Templates are designed to streamline the creation of recurring manual tasks. When creating a new task, the user can select a Task Template and preview it before applying it. This populates the task details, ownership settings, checklists, and scheduling structures. This reduces the need to manually recreate tasks each time and helps ensure consistency across task management processes. An example could be Insurance Claims Received.

Create Task Templates

1. Search or select ***Task Management*** and click the *Automations* button.
2. In the Task Automation window, click the *New task template* button on the left side.
3. The cursor immediately highlights the *Name* field, so a new name can be entered, and the Task Template will be placed in alphabetical order in the list of Task Templates on the left.
4. The only unique field in Task Templates is in the purple 'Applied Manually' section called *Task due after X days.* The system will automatically apply a due date based on this number when a task is created using this template.

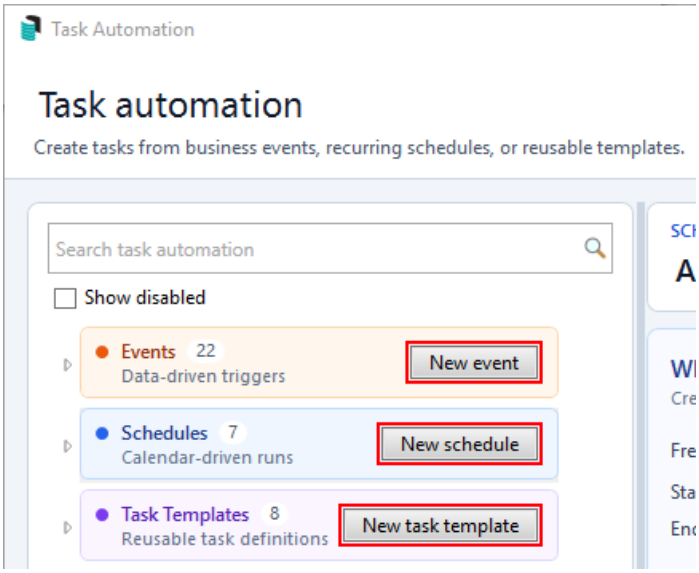


5. After all remaining fields have been completed and options configured, click the*Save all changes* button in the bottom right.
    - For guidance and information on the rest of the fields and options, see*Task Management | Create New Automations*.

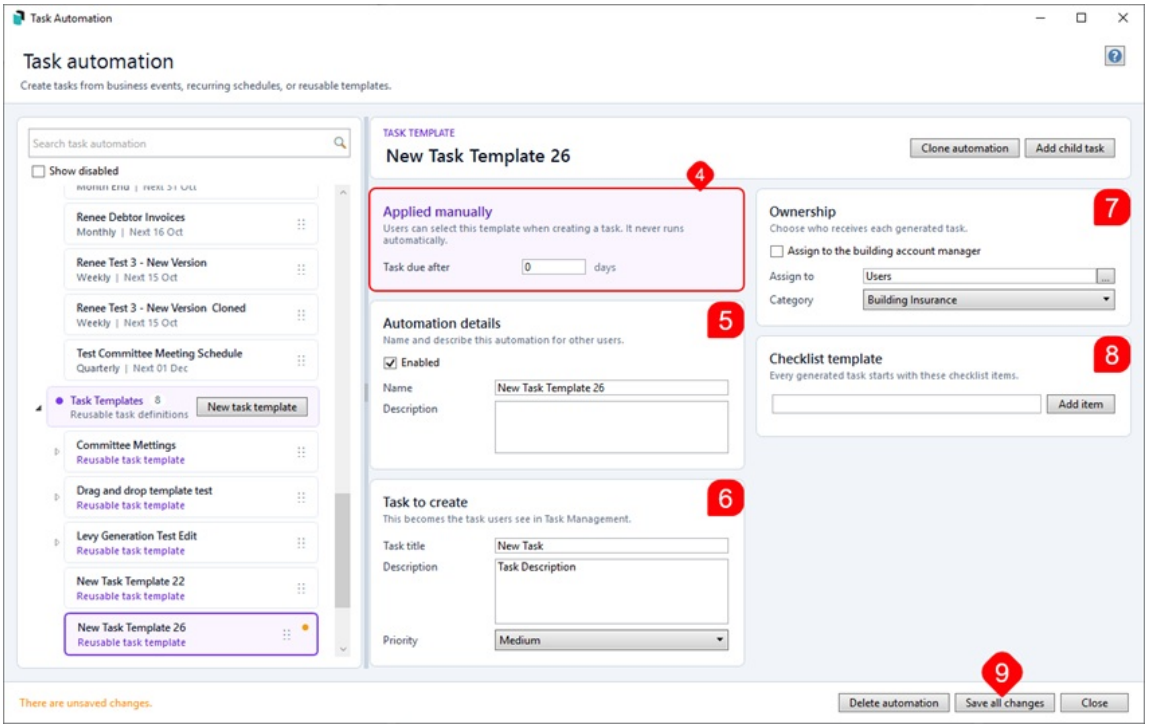
Task Management | Create New Automations

This section covers the various fields, buttons, and options in the 'Task automation' window. For each type of automation, there is a unique section containing the appropriate fields. Each of these unique fields are covered in their respective sections in this article.

1. Search or select ***Task Management*** and click the *Automations* button.
2. In the Task Automation window, click the *New event, New schedule,* or *New task template* button.



3. The cursor immediately highlights the *Name* field, so a new name can be entered.
    - The Automation will be placed in alphabetical order in the list on the left.
    - An orange dot on the item in the list indicates that changes to the item have not been saved yet.
4. Enter the unique information related to the Automation being created.
    - For Events see *Creating Task Events*.
    - For Schedules see *Creating Task Schedules*.
    - For Task Templates see *Creating Task Templates*.



5. **Automation details**:
    - To disable an automation, remove the tick in the *Enabled* box.

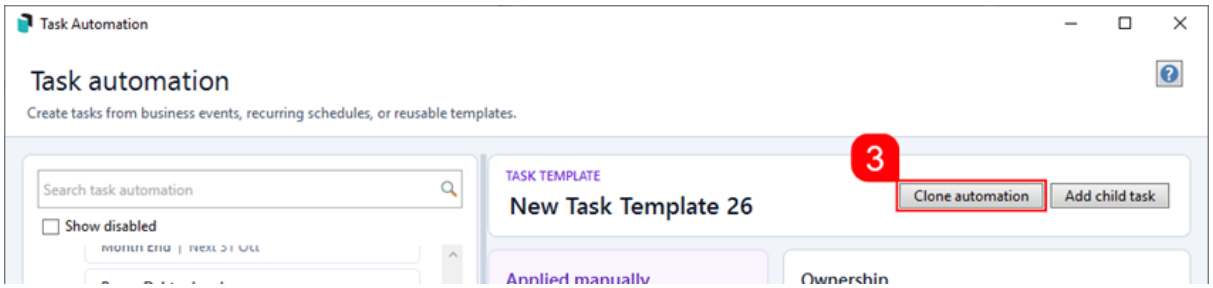
- Type a *Name* for the automation.
- Write a *Description* for the automation.

6. **Task to create**:
   - Type the required *Task title*.
   - Use the *Description* to include any additional information that may be required include help links for procedures etc.
   - Set the *Priority* of the task.
7. **Ownership**:
   - Tick the *Assign to the building account manager* if needed.
   - Use the *Assign to* field to select the user or user group the task will be assigned to.
   - Set the required *Category* if applicable.
8. **Checklist template**:
   - Add any checklist items that are required on the tasks by typing the details and clicking the *Add item* button.
   - If a mistake or typo is made, the checklist item needs to be deleted and a new one created.
   - Click the up or down arrows to change the order of the checklist items and click the red X to delete a checklist item.
9. Once all fields have been completed and options configured, click the *Save all changes* button in the bottom right.

Clone a Task Automation

This section explains how to clone an existing automation.

1. Search or select ***Task Management*** and click the *Automations* button.
2. In the Task Automation window, expand the relevant automation section or use the search field to locate and select the automation to clone. This also includes any child task automations.
3. Click the *Clone automation* button and immediately it is copied, with the word 'Copy' added to the Automation's *Name* field.



4. Make any necessary adjustments and click the *Save all changes* button.

Edit a Task Automation

This section explains how to edit an existing automation. Note that this will not change any tasks that have were already created based on this automation.

1. Search or select ***Task Management*** and click the *Automations* button.
2. In the Task Automation window, expand the relevant automation section or use the search field to locate and and select the automation to edit.
3. Make any required changes.
4. Click the *Save all changes* button.

Disable a Task Automation

This section explains how to delete a schedule. This will stop any further Tasks being created based on the setup. It will not delete any tasks already created.

1. Search or select ***Task Management*** and click the *Automations* button.
2. In the Task Automation window, expand the relevant Automation to disable.
3. Remove the tick from the *Enabled* box in the **Automation Details** section.
4. Click the *Save all changes* button.

Delete a Task Automation

This section explains how to delete a schedule. This will stop any further Tasks being created based on the setup. It will not delete any tasks already created.

1. Search or select ***Task Management*** and click the *Automations* button.
2. In the Task Automation window, expand the Schedules and select the Schedule to delete.
3. Make any required changes.
4. Click the Delete automation button.

Timed Tasks

Timed Tasks have been developed so users can record time against tasks directly within***Task Management,*** and from the StrataMax desktop. Timed entries can be marked as billable provided the task is associated with a building, allowing consultancy recoveries to be created in ***TRMax*** and subsequently processed through the standard recovery workflow.

Since timed entries can be billable, a billing processing functionality is included and enhances task visibility through recorded time entries. Time allocations can be reviewed, analysed and reported/extracted with ***Search Time Allocations***.

Timed Tasks Configuration

Before using Timed Task recordings, a consultancy invoice code needs to be configured in***TRMax***.

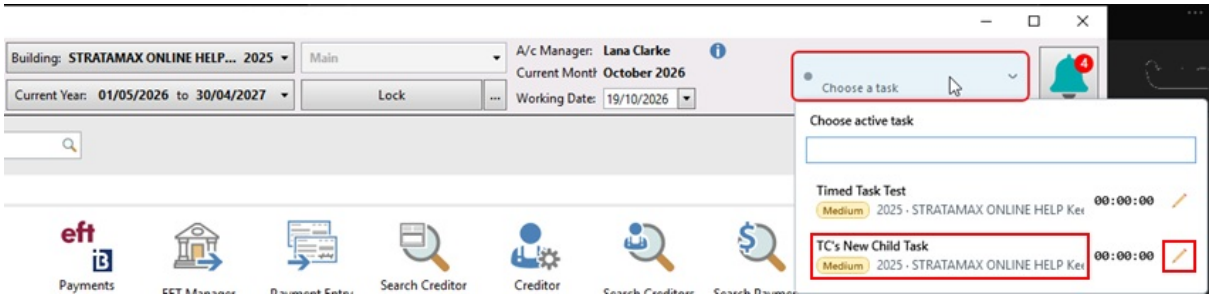
Please the following articles that cover the setup:

- *Consultancy Invoice Code*
- *TRMax Consultancy Rate*

Record Time Entries

This section covers how to record time entries for tasks in StrataMax, using the timer in the top right of the StrataMax desktop.

1. Click the timer in the top right of the StrataMax desktop.



2. Select the required tasks from the list and the timer will start automatically.
    - The building number and name will be displayed next to the task unless it hasn't been assigned to the task yet.
    - The numbers represent HH:MM:SS currently being recorded.
    - Clicking the pencil icon on the right will open the task itself.
3. The blue *Pause* button will pause the timer, whilst the red *Stop timer* button will pause the timer and open the 'Save task time entry' window.



4. In the 'Save task time entry' window.
    - The *Comments* box supports up to 250 characters and can be used to enter any additional info about the time entry.
    - If the task is already assigned to a building, the *Billable time* tick box will be available to tick. If ticked, then the time entry will be saved in the *Process Task Billing* window, so it can be processed and saved as a ***TRMax*** recovery.
    - If the task is not assigned to a building, then the *Billable time* tick box won't be available.
    - Clicking the *Discard time* button will close the 'Save task time entry' window without saving

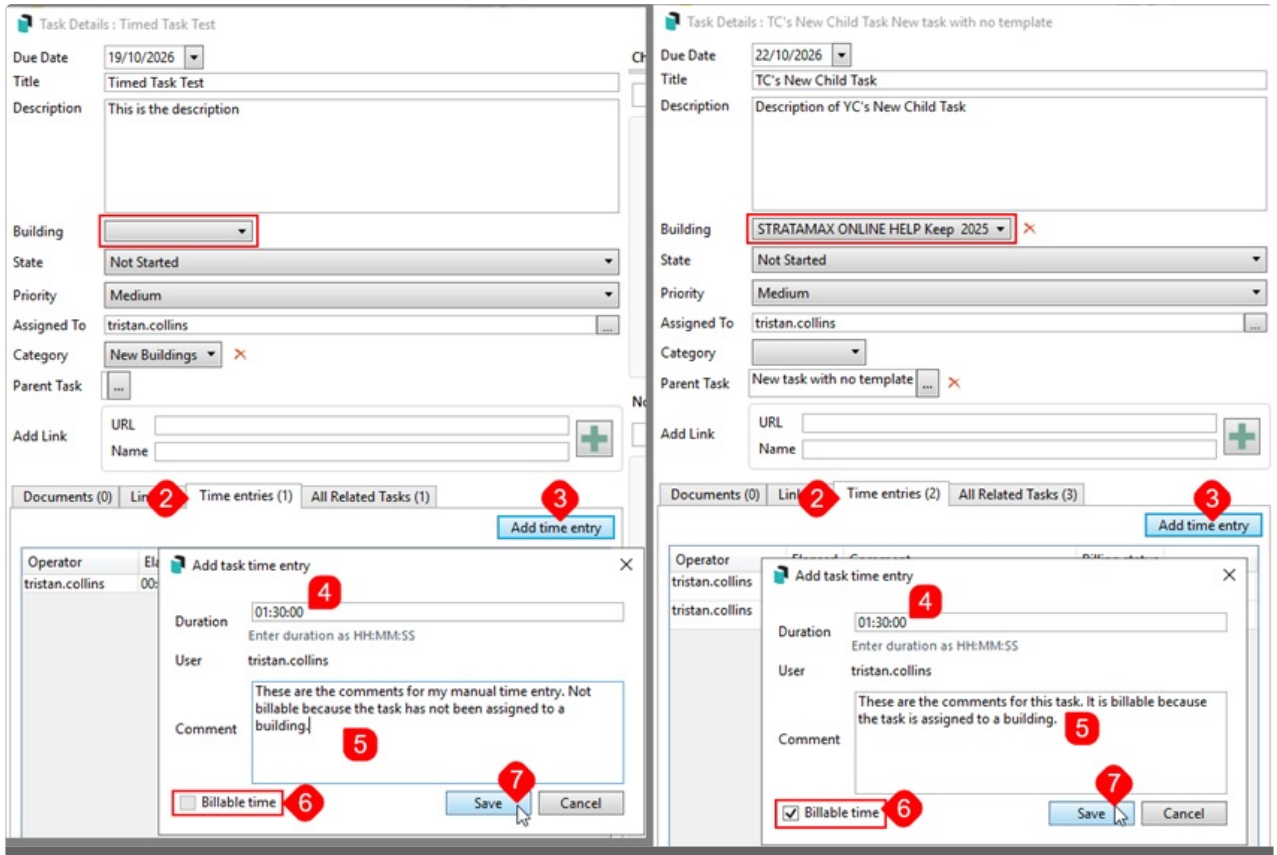
the time entry and clear the task from the timer.

- Clicking the *Save entry* button will save the time entry against the task and clear the task from the timer.
  - The time entry can be seen from within the task, in the *Time entries* tab.
- Clicking the *Cancel* button will close the 'Save task time entry' window and the timer will continue.

Add Manual Time Entries

This section covers how to manually add time entries to a task, without using the task timer on the StrataMax desktop.

1. Search or select ***Task Management,*** then locate and open the required task.
2. In the bottom left section of the 'Task Details' window select the *Time entries* tab
3. Click the *Add time entry* button and the 'Add task time entry' window will open.
4. In the *Duration* field type the required duration in a HH:MM:SS format.
5. The *Comments* box supports up to 250 characters and can be used to enter any additional info about the time entry.
6. If the task is already assigned to a building, the *Billable time* tick box will be available to tick. If ticked, then the time entry will be saved in the *Process Task Billing* window, so it can be processed and saved as a ***TRMax*** recovery.
   - If the task is not assigned to a building, then the *Billable time* tick box will be inactive.
7. Click the *Save* button to save the time entry and close the 'Add task time entry' window.

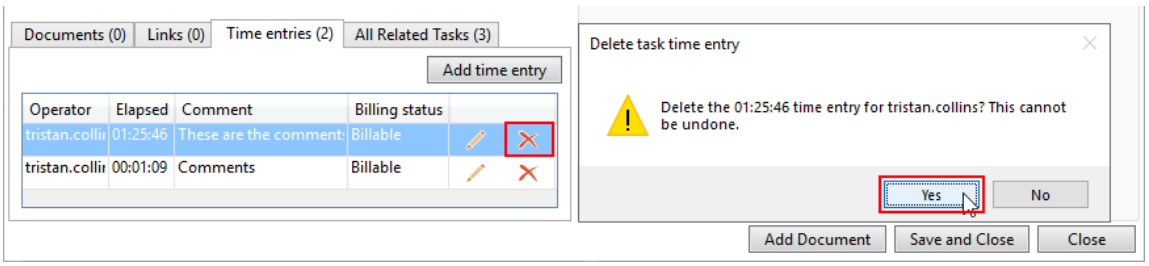


Non-billable time entry on the left. Billable time entry on the right.

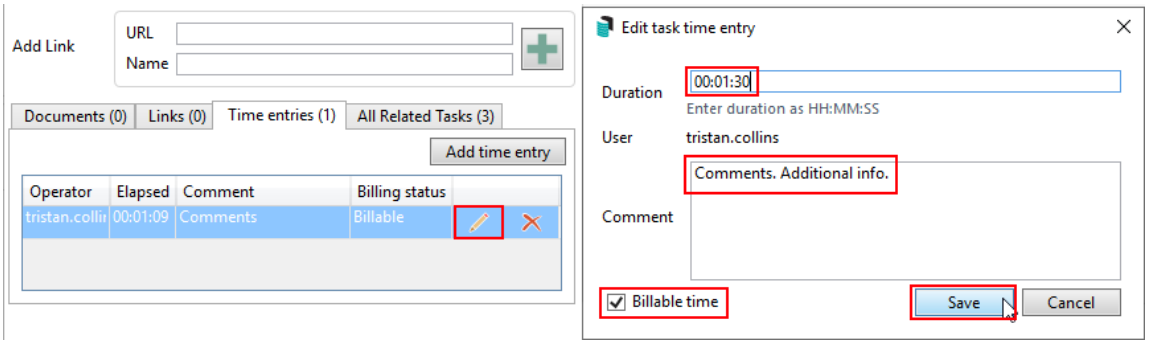
Edit or Delete Existing Time Entries

This section covers how to edit or delete existing time entries that have been saved in a task.

1. Search or select ***Task Management,*** then locate and open the required task.
2. In the bottom left section of the 'Task Details' window select the *Time entries* tab.
    - To delete a time entry, click the red X icon next to the entry and click*Yes* to confirm.



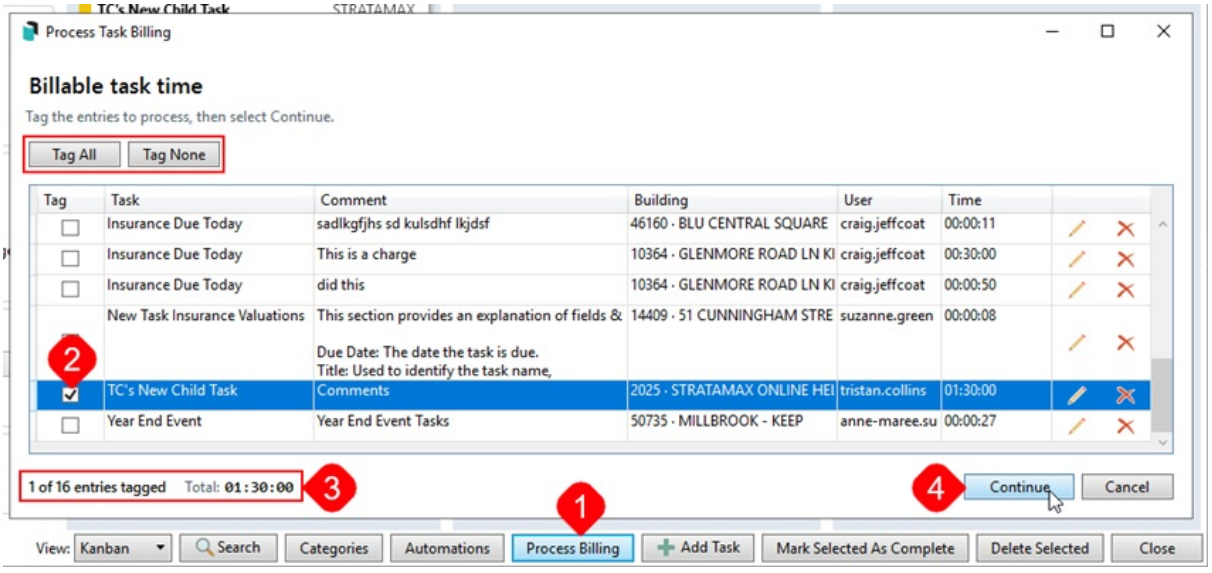
    - To edit a time entry, click the pencil icon and the 'Edit task time entry' window appears where the *Duration, Comments,* and *Billable time* box can be modified.



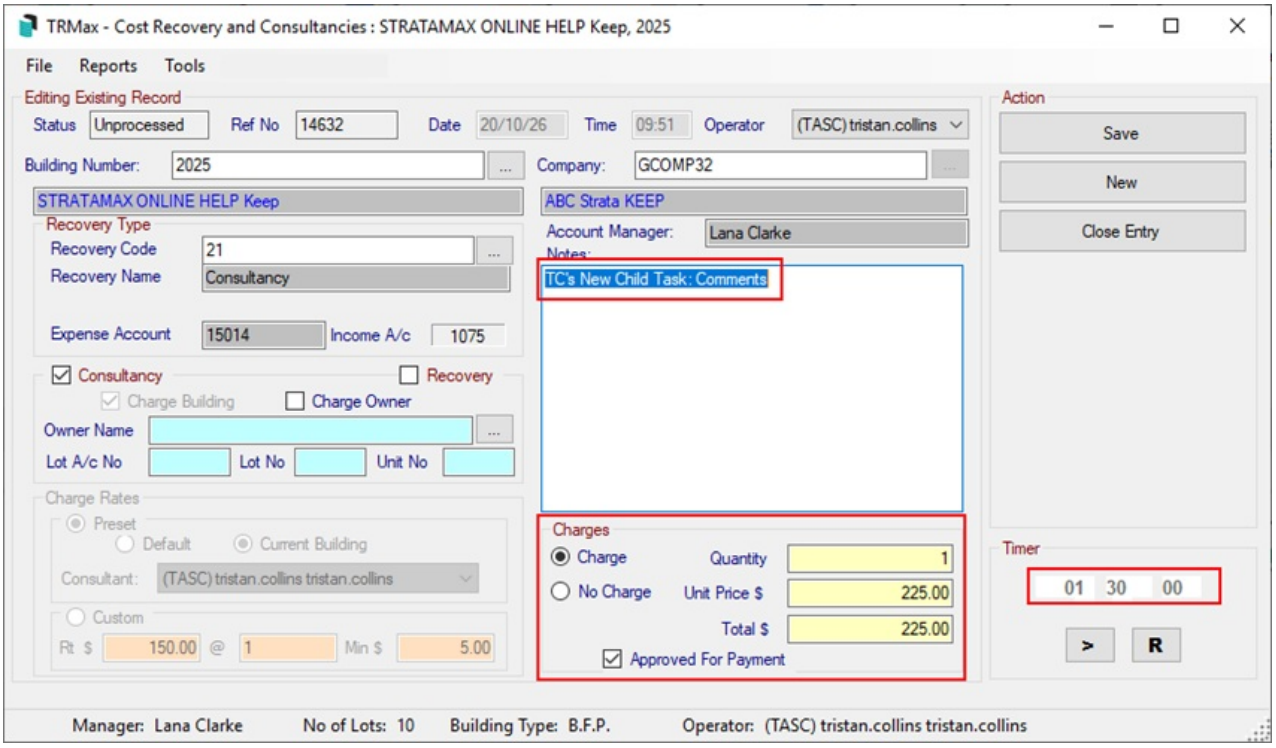
Process Billable Task Time

This section covers the steps to process the billable task time in ***Task Management***.

1. Search or select ***Task Management*** and click the *Process Billing* button.
2. In the 'Process Task Billing' window tag all the required entries (use the *Tag All* and *Tag None* buttons for convenience).
    - Time entries can also be edited or deleted by clicking the *Edit* or *Delete* buttons on the right side.
3. The total number of time entries tagged as well as the total duration being processed are displayed in the bottom left.
4. Click the *Continue* button and the 'Process Task Billing' window will close.



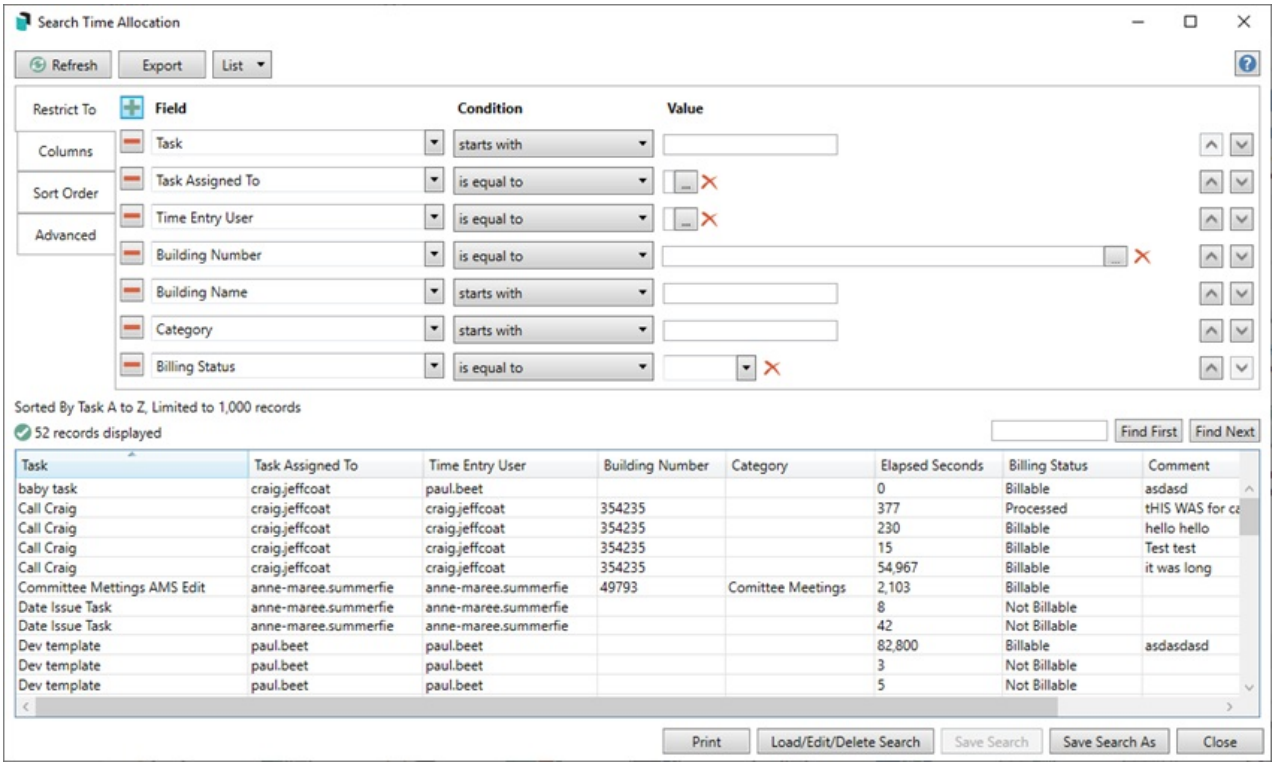
5. A new recovery record for each time entry will be saved in ***TRMax*** where it can be opened for review, edited before saving and being processed, or deleted from ***TRMax***.



Search Time Allocations

This section covers the ***Search Time Allocation*** screen, which has been designed to provide users a method of searching, reporting, and exporting data from time entries that have been saved in tasks in ***Task Management***.

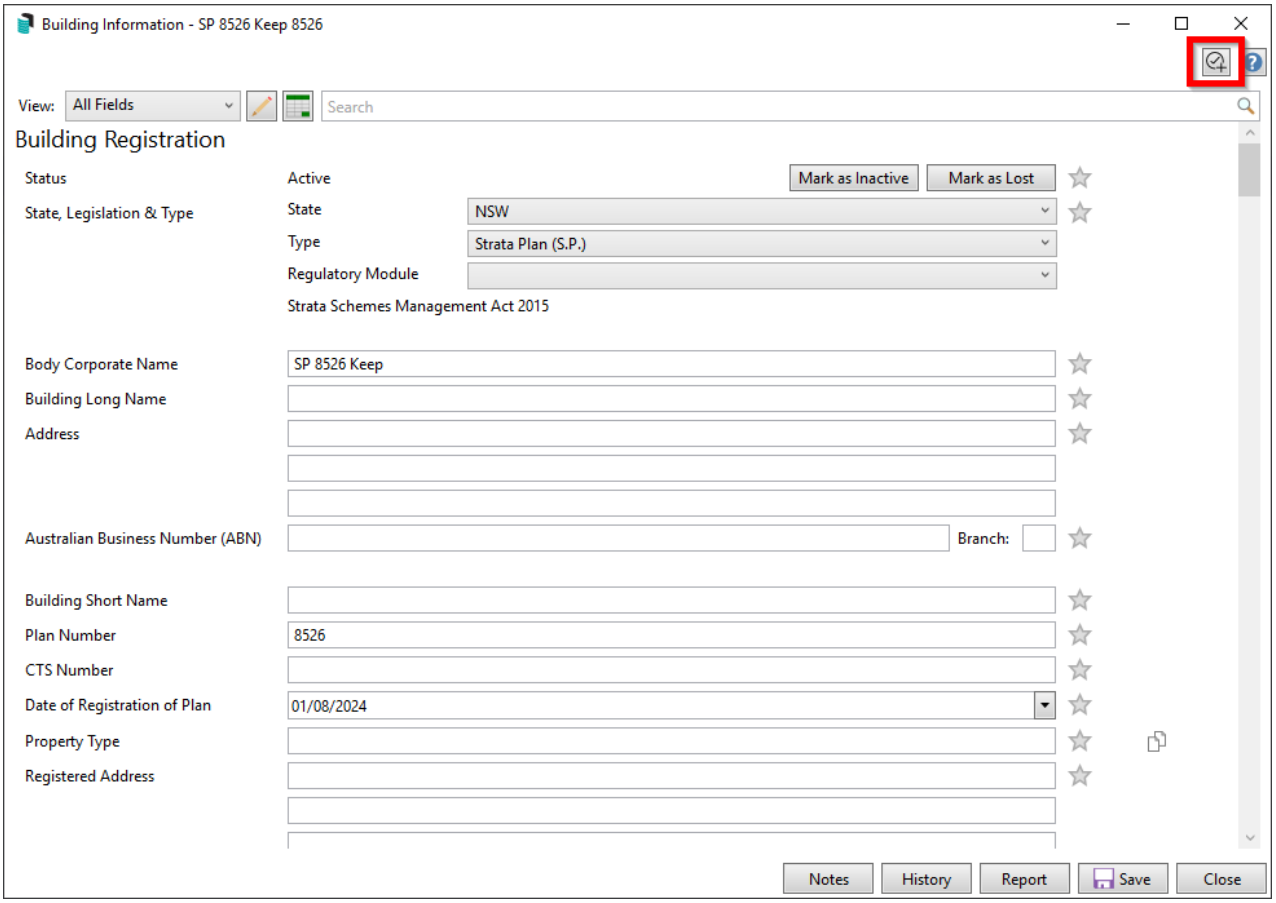
The interface has been designed to be and function exactly the same as all the other Search screens throughout StrataMax. Therefore, please refer to the *Searches* article for a comprehensive guide on how to utilise the ***Search Time Allocation*** screen, and other Search screens in StrataMax.



Quick Tasks

Shortcut icons used to create a task are available from the below areas of StrataMax; these are intended to allow for quick creation of a task without the need to navigate to Task Management.

- Building Information.
- DocMax (a saved document).
- Bank Account Setup.
- Office Bearers.
- Invoice Hub / Review Invoices.
- Bank Rec.
- Building Transfers.



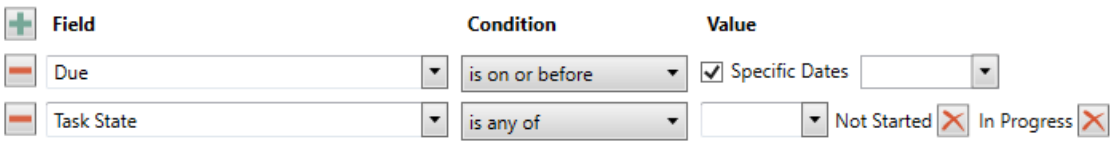
Search Tasks

Tasks are available for direct search in ***Task Management*** using the search button or by selecting ***Search Tasks***.

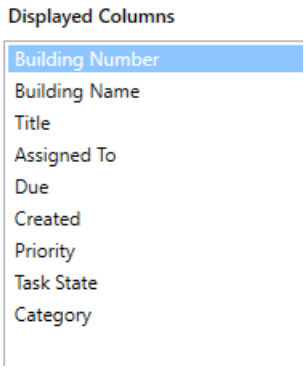
The following is an example of the restriction and column display fields for All Overdue Tasks.

All Overdue Tasks (Search Tasks)

Restrict To:



Displayed Columns:



Task Management | Logs

When a task is created, deleted, or when any of the following fields are updated, details will be recorded in *Log Viewer* under the category of 'Tasks'.

- State
- Assigned to
- Due Date
- Priority
- Notes

