Tasks User Guide

Real Estate Manager

Version 26.2.1

Document Information

Notices

Copyright

The information contained in this document represents the current view of insightsoftware.com on the issues discussed as of the date of publication. This document is for informational purposes only. insightsoftware.com makes no representation, guarantee or warranty, expressed or implied, that the content of this document is accurate, complete or up to date.

Disclaimer

This guide is designed to help you to use the Real Estate Manager applications effectively and efficiently. All data shown in graphics are provided as examples only. The example companies and calculations herein are fictitious. No association with any real company or organization is intended or should be inferred.

Contents

Tasks

The Tasks feature in Administration allows you to link specific users with Tasks for assets. Tasks can be defined for an Asset in order to track activities that are associated with a particular asset. The Task tab within an Asset allows you to define, record and track tasks that are specifically tied to an asset and contract. Using Tasks, Real Estate Manager may be used to ensure that deadlines are managed throughout the portfolio.

The Administration Workspace and Master Data

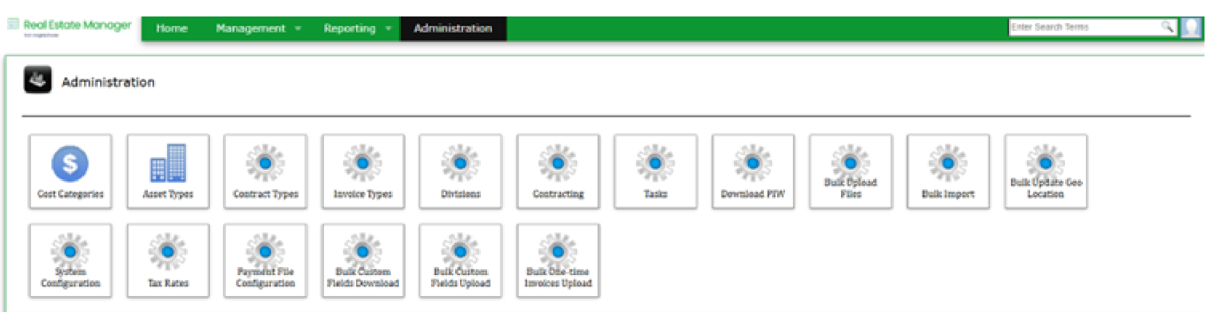
The Administration workspace establishes a global configuration for your data and how you want to organize your real estate portfolio. After you complete configuring your data, it is available to use to add assets (properties), contracts and leases, invoices, compliance requirements, and financial data such as cost centers and budgets. You may also then use the Real Estate Portfolio Intake Workbook (REPIW). You may continue to configure your data as your real estate portfolio changes by adding new data structures and removing others. The data that you configure in the Administration workspace is referred to as Master Data because it is available throughout REM.

About Master Data

Master Data is the set of data fields that you define and group under various data structures. For example, in Real Estate Manager you can define different types of invoices and associate specific data fields with each type of invoice. Master Data is unique to each client and must be defined prior to using Real Estate Manager. After the initial set up, Master Data can be edited, new Master Data can be added, and existing Master Data can be deleted. Master Data provides a consistent data structure across your portfolio while allowing for differences among different assets. Master Data makes managing your portfolio easier and more efficient.

Administration Workspace

The Administration workspace allows you to create and manage your Master Data in the system. To access the Administration workspace, from the Top NavBar, click Administration.



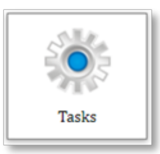
The Administration workspace tiles provide access to functions used to configure the Master Data as listed in the following table.

Management Tiles	Description
Cost Categories	Data related to any payable or receivable associated with an asset.

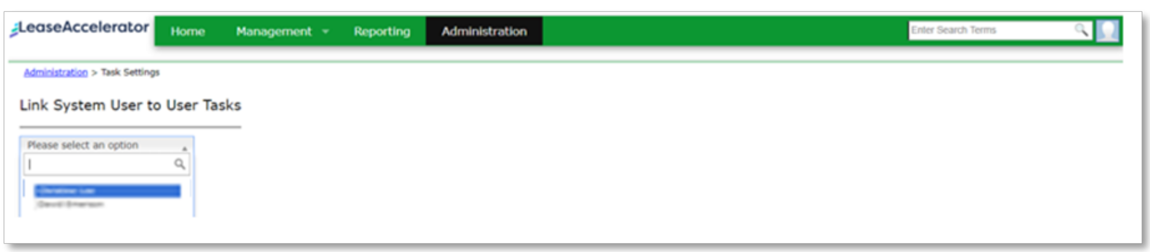
Management Tiles	Description
Asset Types	Organizes assets into categories that group different types of assets.
Contract Types	Organizes contracts or agreements into groups that have similar characteristics.
Invoice Types	Organizes invoices (either payable or receivable) into groups.
Divisions	Defines your business structure along with the associated accounting codes.
Contracting	Defines the types contractors and any related certifications.
Tasks	Links users with tasks for Assets.
Bulk Import	Imports contract files in bulk.
Bulk One-time Invoices Upload	Uploads one-time payable invoices in bulk.

Linking Users for Tasks

1. From the Top NavBar, select **Administration**. The Administration workspace opens.
2. Click the Tasks tile and the workspace opens.



3. From the Link System User to User Tasks drop-down, select the user you want to link to the Tasks function.



4. Click **Link User**. The user will be available to assign to a Task added for an Asset.

Tasks Tab within an Asset

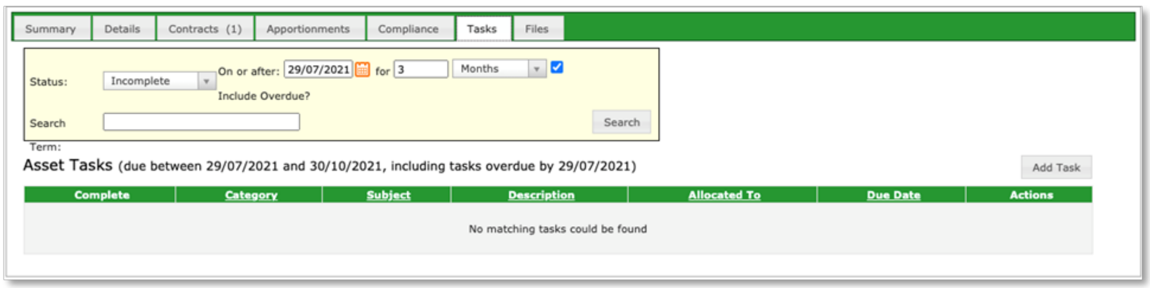
The Tasks tab within an Asset allows you to define Tasks, assign them to a specific person, and establish a schedule for them. It is within this workspace where all current, non-completed tasks are presented. The assignor of the task can choose to notify assignee of the task via an email notification when a new task is added or any existing task is edited, deleted, or reassigned to a different user. It is here where you can add a new task, mark a current task complete, edit a current task, delete a current task, search for tasks, or reorder the task list. Tasks that have already been marked as complete can be accessed here as well.

Adding a Task

1. From the Top NavBar, select Management, then select Assets to open the Asset workspace.

2. In the Action Panel, click the Expand Tree icon to display the Asset for which you want to add a Task and click the Asset.

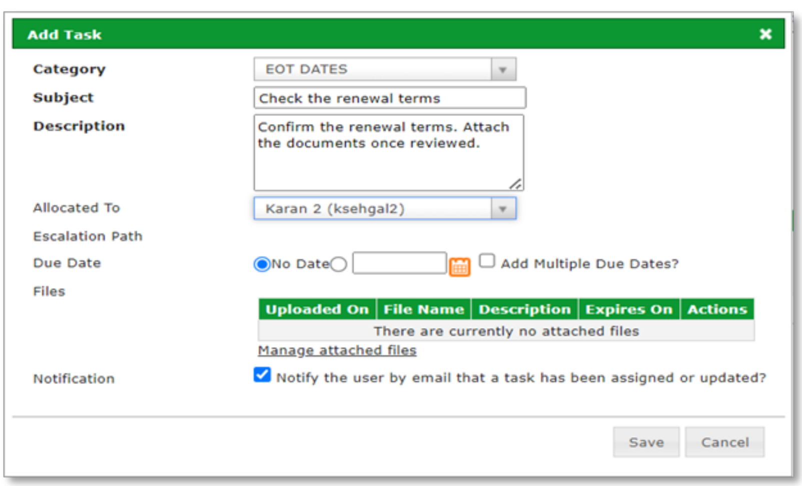
3. Click the Tasks tab.



4. Click **Add Task**.

5. From the Category drop-down, select the appropriate Category.

> **Note:** As you enter characters in the Category field, Categories that match the characters display.



6. To add a new Category, enter the label in the Category field and click the **Add and select?** link. The new category will be added.

7. Enter a label for the Tasks in the Subject field.

8. Enter information about the Task in the Description field

9. From the Allocated To drop-down, select the person to whom you want to assign the task.

10. To add a new person, enter the name in the Allocated To field and click the **Add and select?** link. The person will be added.

> **Note:** The person you allocate a task to does not have to be a user. Entering staff responsible for tasks can be used by the asset manager for tracking purposes. However, to receive email notifications, the assignee needs to have a valid email address and access to the system.

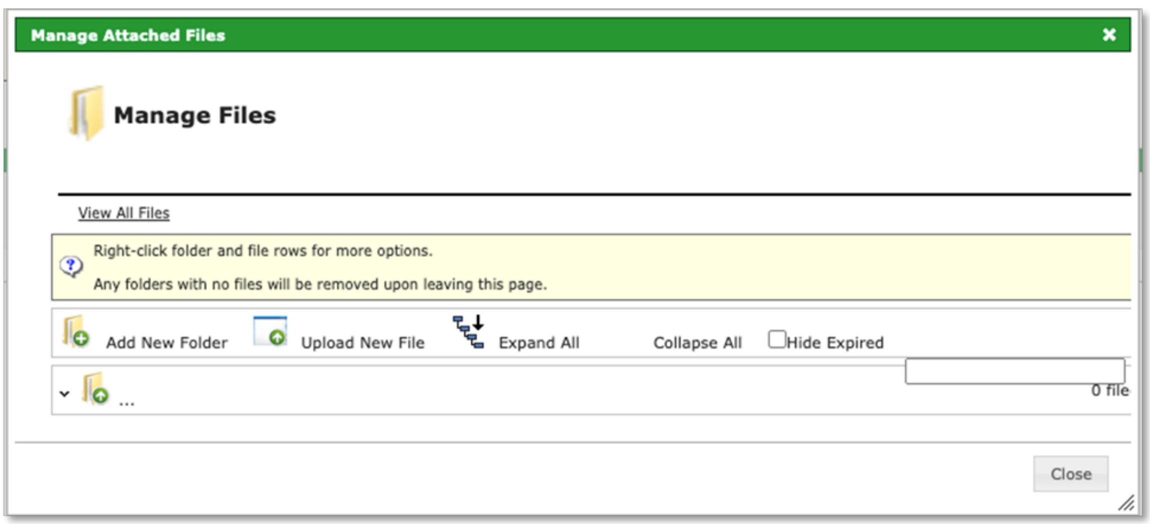
11. To define a Due Date for the tasks, select the appropriate option.

12. Select the No Date radio dial if no date is defined.

13. To define a single due date, click the blank field or the Calendar icon to display the calendar and select the appropriate date.

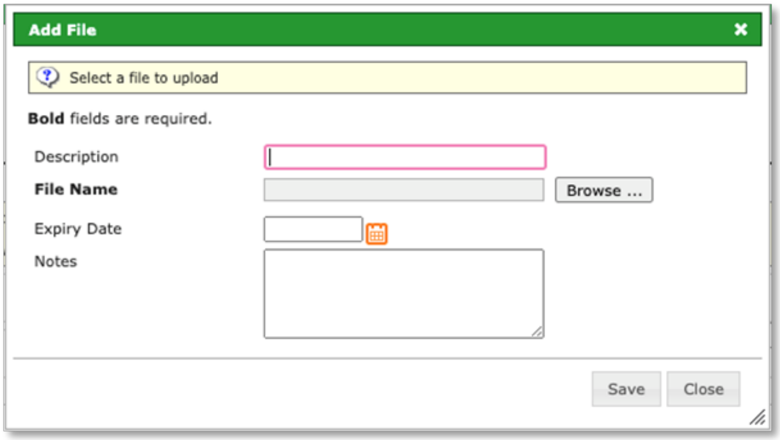
14. To define more than one due date, click the **Add Multiple Due Dates?** checkbox. To enter a start date, click in the blank field or use the Calendar icon to display the calendar and select the appropriate date.

15. To attach a document to the Task, click **Manage Attached files**.



16. Click **Upload New File**.

17. Populate the Description field.



18. Click **Browse** and navigate to the location of the file you want to attach, select the file, and click **Open**. The file displays in the File Name field and message indicates that the upload is complete.

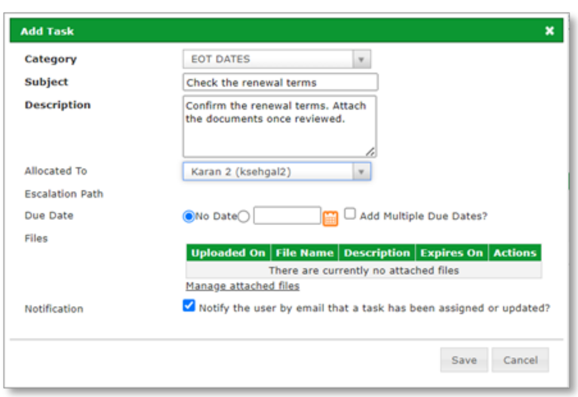
19. To define an expiration date for the file, click in the Expiry Date field or click the Calendar icon to display the Calendar and select the appropriate date.

20. Enter information about the file in the Notes field.

21. Click **Save**.

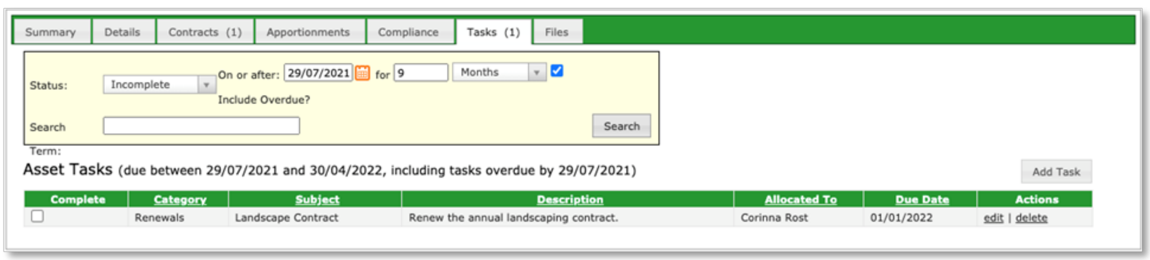
22. Click **Close** in the Manage Files pop-up.

23. To notify the assignee via an email, check the **Notification** box. Users can unsubscribe from notifications by unchecking the Notification box. For any existing task, users will need to manually check the Notification box to receive updates.



24. The email notification will be triggered for the following scenarios:
    a. When a new task is assigned to a user.
    b. When an existing task is reassigned to a different use.
    c. When an existing task is deleted.
    d. When a task is updated or edited.

25. The email will contain the following information:
    a. Subject Line: The subject will indicate the nature of the notification (e.g., "A new task has been assigned", "An existing task has been edited or reassigned", etc.).
    b. Details Included:
        - Category
        - Subject
        - Description
        - Asset details
        - Assignor details
        - URL to the task tab section (Please login to the application before you copy and paste the URL to the browser.)

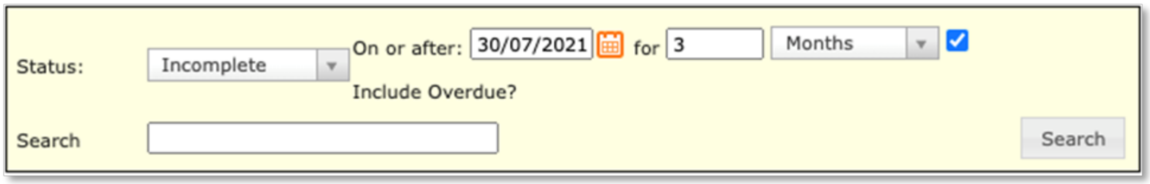


26. Click **Save** to save the task and it will display.

Searching for a Task

Real Estate Manager allows a user to search for a particular task by due date, status, or subject.

1. From the Top NavBar, select **Management**, then select **Assets** to open the Asset workspace.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset for which you want to add a Task and click the Asset.
3. Click the **Tasks** tab.
4. To search by status, from the Status drop-down, select the status for the tasks you want to display.
    a. **Incomplete** – Task has not been marked completed in Real Estate Manager as of the date entered in the On or after field.
    b. **Complete** – Task has been marked completed in Real Estate Manager.
    c. **Overdue** – Task has not been marked completed in Real Estate Manager and it is past the due date.
    d. **All** – All tasks display with all status values.



5. Click the On or after field or the Calendar icon to display the calendar and select the beginning date for the search.

6. In the going back field, enter the number of periods and select the period from the drop-down to set the range of dates to search from the beginning date.

> **Note:** To search Tasks, you must select a beginning date and length of time you want to include in the search.

7. To include tasks that are overdue in the search, click the Include Overdue? checkbox.

8. To limit the search results based on a set of characters, enter characters in the Search field.

9. After you have entered the appropriate search parameters, click **Search**. The tasks that meet the criteria display.

> **Note:** You can combine search methods, such as searching for Incomplete tasks with due dates in the next two weeks with the term “Inspection.”

Reordering the Tasks

1. From the Top NavBar, select **Management**, then select **Assets** to open the Asset workspace.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset for which you want to add a Task and click the Asset.

3. Click the **Tasks** tab.

4. To order the tasks list:

    a. Click the Category, Subject, Description, Allocated To, or Due Date column headings to order them in ascending order.

    b. Click the same column heading again to reorder them in descending order.


Asset Tasks (pending and completed tasks due between 30/07/2021 and 31/07/2024, including tasks overdue by 30/07/2021) Add Task

Complete	Category	Subject	Description	Allocated To	Due Date	Actions
☐	Inspections	Schedule Fire Marshall Inspection	Schedule annual inspection	Jorgan Fulmer	01/04/2021	edit | delete
☐	Renewals	Landscape Contract	Renew the annual landscaping contract.	Corinna Rost	01/01/2022	edit | delete
☐	Renewals	Notify Landlord	Send notification of intent to renew to Landlord.	Corinna Rost	01/11/2023	edit | delete

5. Click the On or after field or the Calendar icon to display the calendar and select the beginning date for the search.

6. In the going back field, enter the number of periods and select the period from the drop-down to set the range of dates to search from the beginning date.

> **Note:** To search Tasks, you must select a beginning date and length of time you want to include in the search.

7. To include tasks that are overdue in the search, click the Include Overdue? checkbox.

8. To limit the search results based on a set of characters, enter characters in the Search field.

9. After you have entered the appropriate search parameters, click **Search**. The tasks that meet the criteria display.

> **Note:** You can combine search methods, such as searching for Incomplete tasks with due dates in the next two weeks with the term “Inspection.”

Completing a Task

When a task is completed, you can change the status to Complete.

1. From the Top NavBar, select **Management**, then select **Assets** to open the Asset workspace.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset for which you want to add a Task and click the Asset.

3. Click the **Tasks** tab.

Asset Tasks (pending and completed tasks due between 30/07/2021 and 31/07/2024, including tasks overdue by 30/07/2021) Add Task

Complete	Category	Subject	Description	Allocated To	Due Date	Actions
☑	Inspections	Schedule Fire Marshall Inspection	Schedule annual inspection	Jorgan Fulmer	01/04/2021	edit | delete
☐	Renewals	Landscape Contract	Renew the annual landscaping contract.	Corinna Rost	01/01/2022	edit | delete
☐	Renewals	Notify Landlord	Send notification of intent to renew to Landlord.	Corinna Rost	01/11/2023	edit | delete

4. To change the status of a task to Complete, click the checkbox in the Complete column for the appropriate task(s).

> **Note:** If you need to change the status back to Incomplete, display the task and uncheck the Complete checkbox.

Editing a Task

After you add a task, you can continue to maintain information about the task.

1. From the Top NavBar, select **Management**, then select **Assets** to open the Asset workspace.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset for which you want to add a Task and click the Asset.

3. Click the **Tasks** tab.

4. Click the **edit** link for the task you want to edit.

5. Edit the appropriate fields as necessary.

6. Click **Save** to update the task.

Deleting a Task

1. From the Top NavBar, select **Management**, then select **Assets** to open the Asset workspace.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset for which you want to add a Task and click the Asset.

3. Click the **Tasks** tab.

4. Click the **delete** link for the task you want to delete.

5. Click **Okay** in the confirmation box. The task is deleted.

Version Summary

Version	Changes/Updates	Date
21R2.1	Guide created. Tasks broken out from larger guide.	07/30/2021
23R3	Removed all reference to Real Estate Manager.	08/08/2023
242.3	Added steps to add email Notification for a task (Task Within the Asset)	08/15/2024