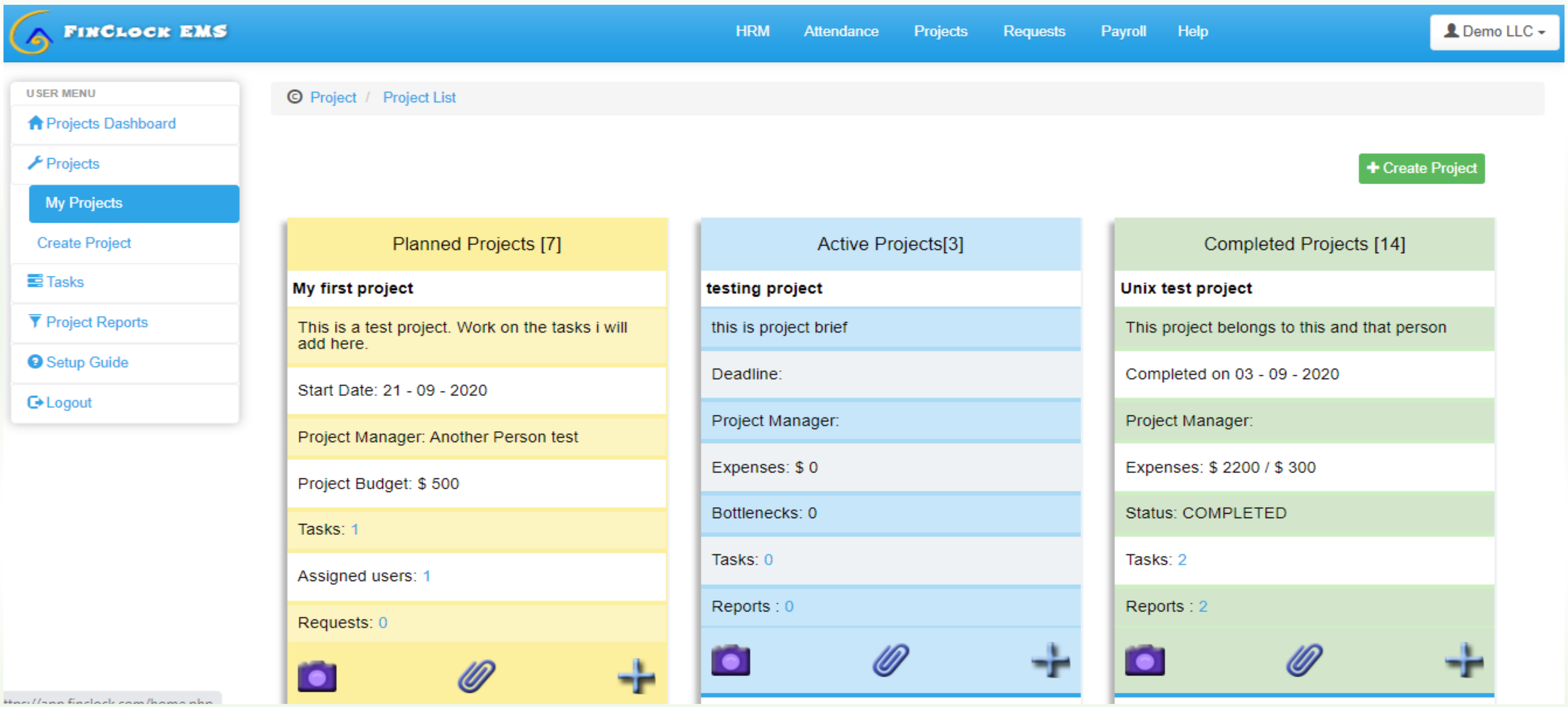
FinClock Guide: Project Management in 4 steps

1. **Add tasks** commonly done in your organization
2. **Create projects** and Assign tasks to people (with SMS notification)
3. People make **work reports** and update status of their tasks.
4. Evaluate project reports for staff and project **performance**



1. Adding tasks commonly done in your organization

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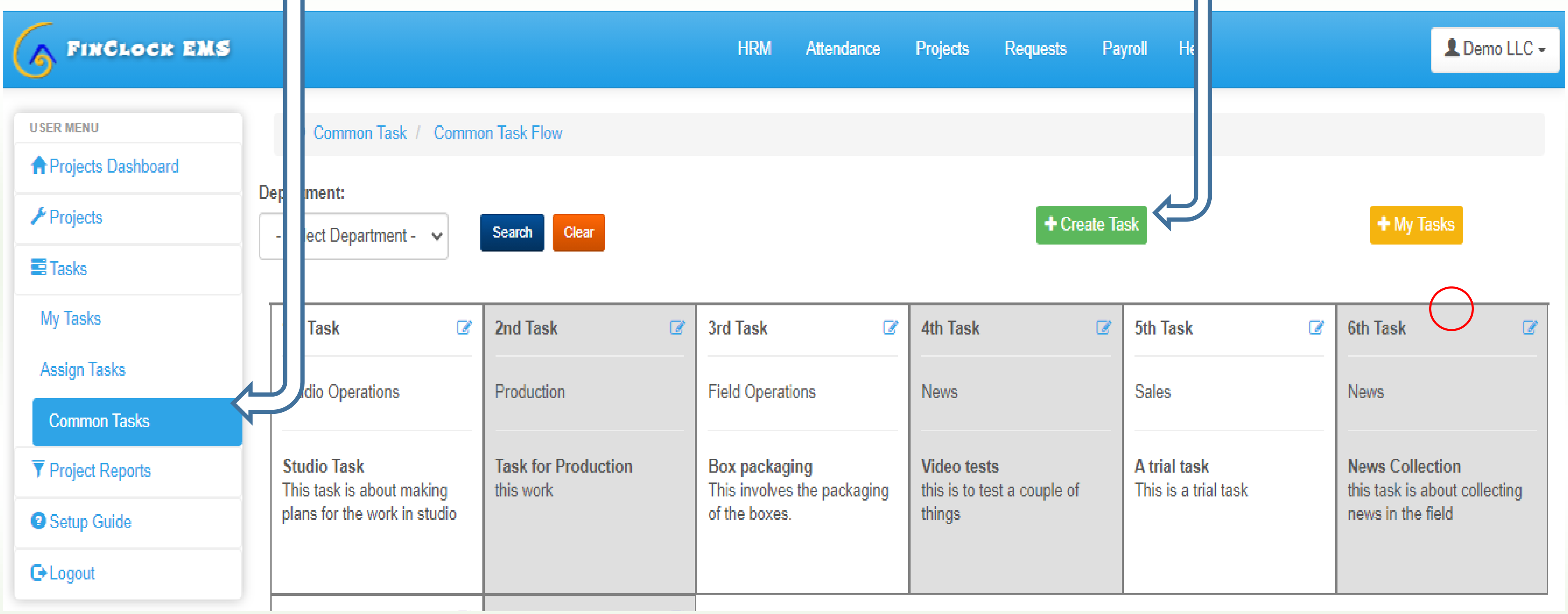
Step 1: Common tasks:

Select **Common tasks page**, under Tasks menu.

2

Step 2: Create Common tasks

Click **create task button** to open a popup, where you will add tasks under departments.



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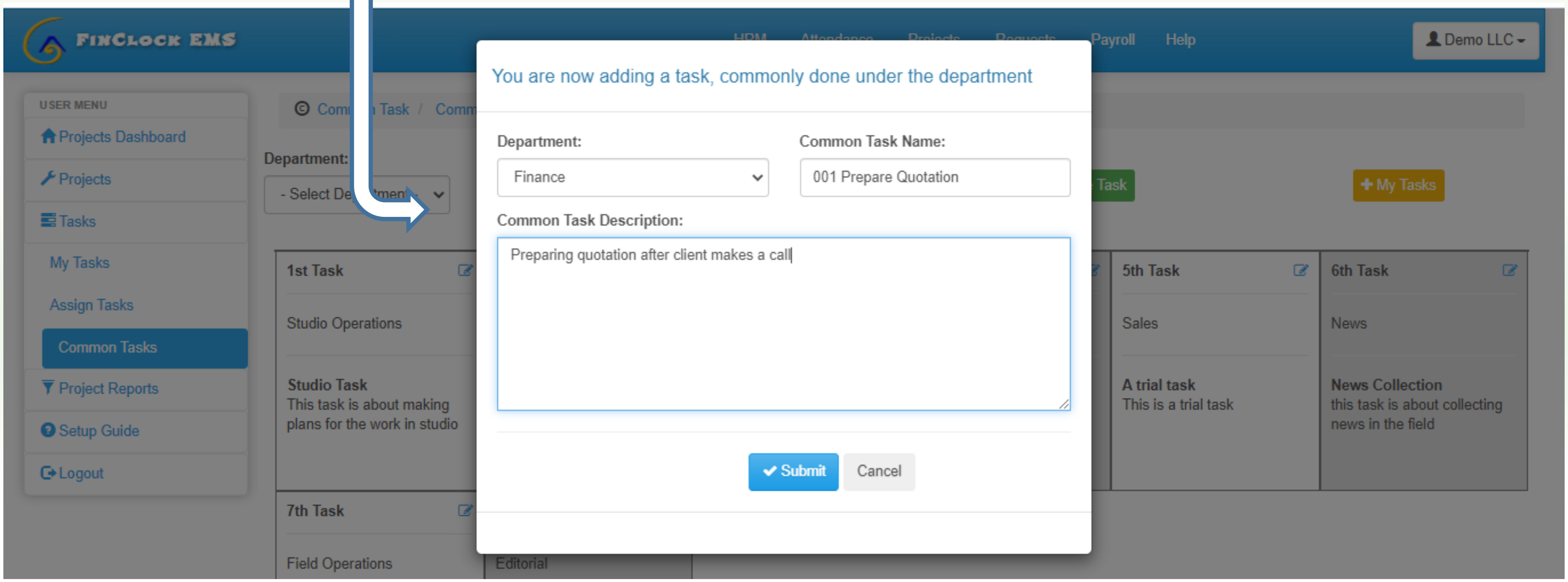
Step 3: Select department and add a task done under the department.

- Example: Finance department, the first task can be 001 Prepare quotations.
- Remember to use the 001 numbers to help you organize the tasks in future.
- You may arrange the order of tasks by clicking the edit icon after submitting the task.



2. Creating Projects and Assigning tasks to people

1

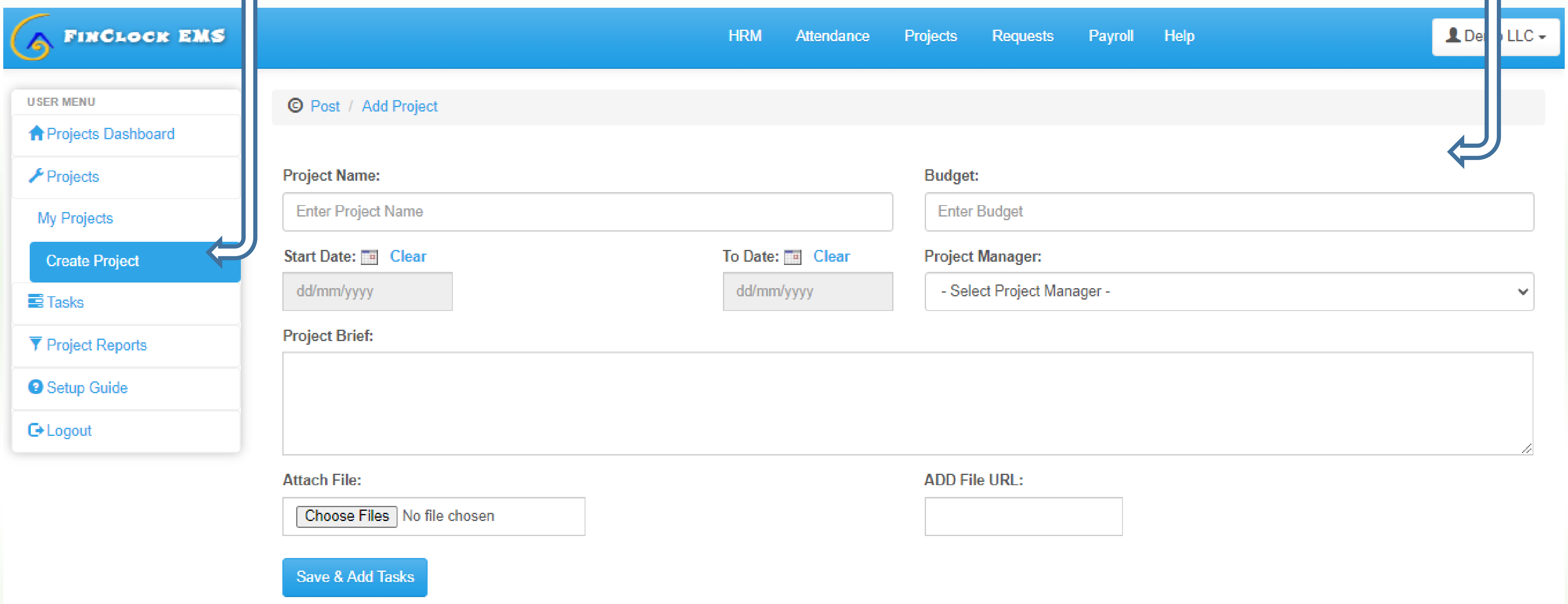
Step 1: Create project page

Start by clicking the projects menu and select the create project.

2. Add project

Step 2: Add Project Details

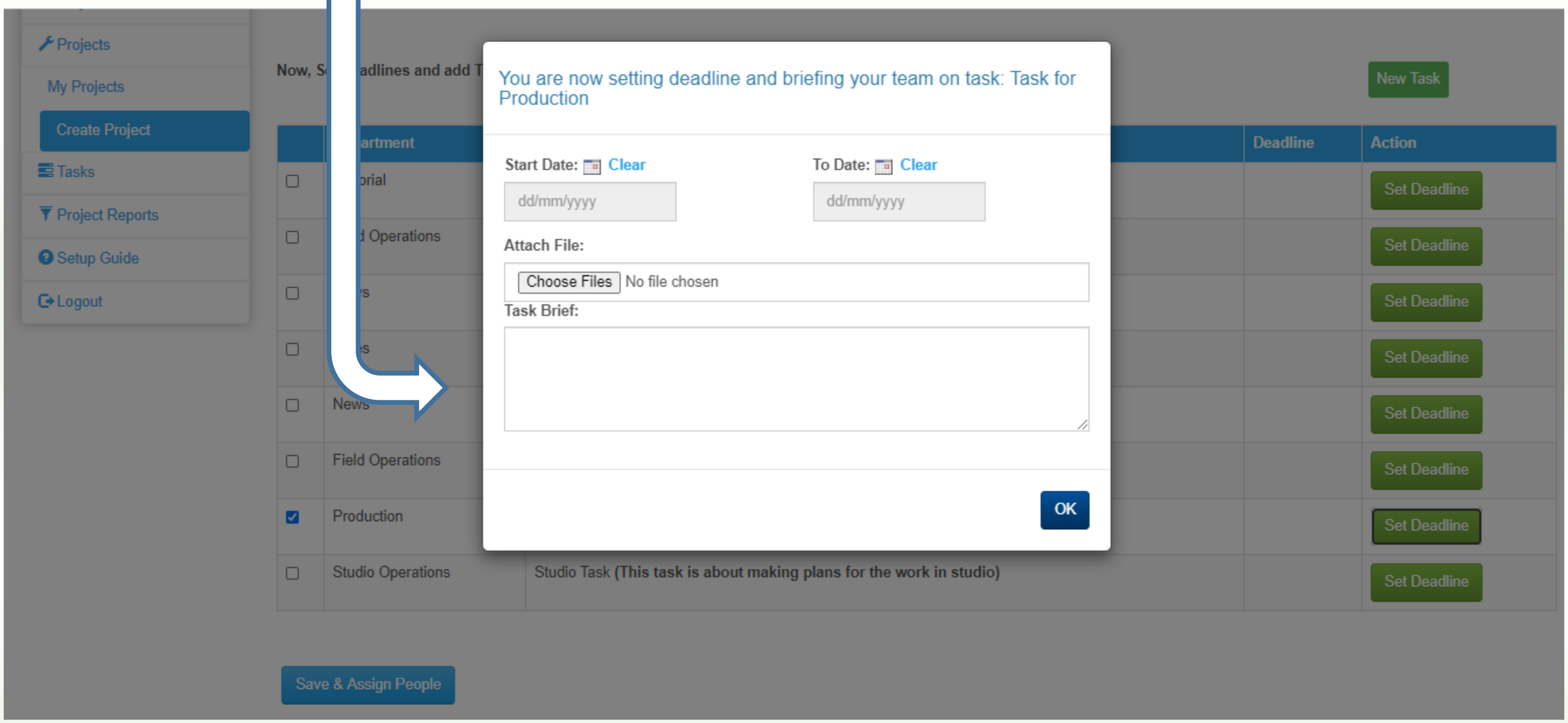
Add project name, Project budget, start date and end date, and select the project manager from the team member's list. Then, scroll down and click **Save & Add Tasks Button.**



3. Add Task to Project

Step 2: Add Tasks to the project

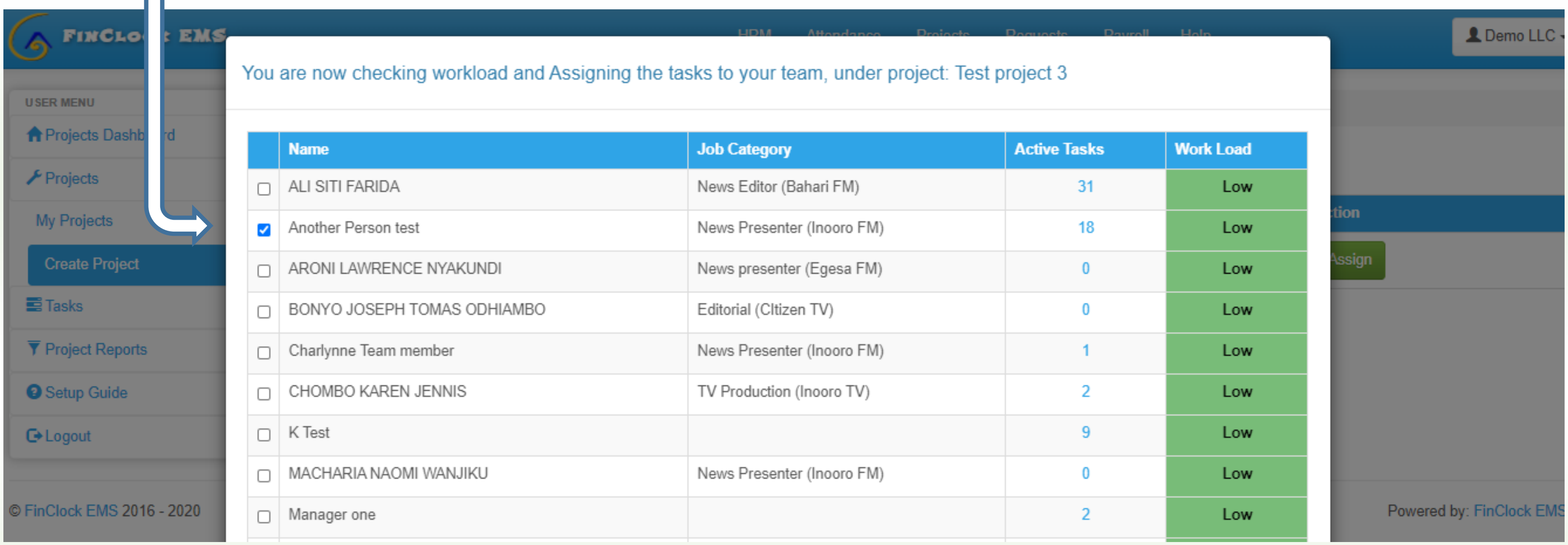
- Select the task that you wish to add to the project, then click the set deadline button to open a popup. Then, set the start date and end date for the task, attach any file related to the task and add brief instructions to the person working on the task.
- Scroll down to the end of the page and select the ‘Save and Assign People Button’ to open a page. **Click the Assign button**



3. Assign Tasks

Step 2: Assign Tasks to people

- Clicking the assign button opens a page, where you can select the people you wish to assign tasks. Note that you can assign task to many people, based on the workload shown here.
- Then, scroll down and click the assign button.
- Then click Finish.

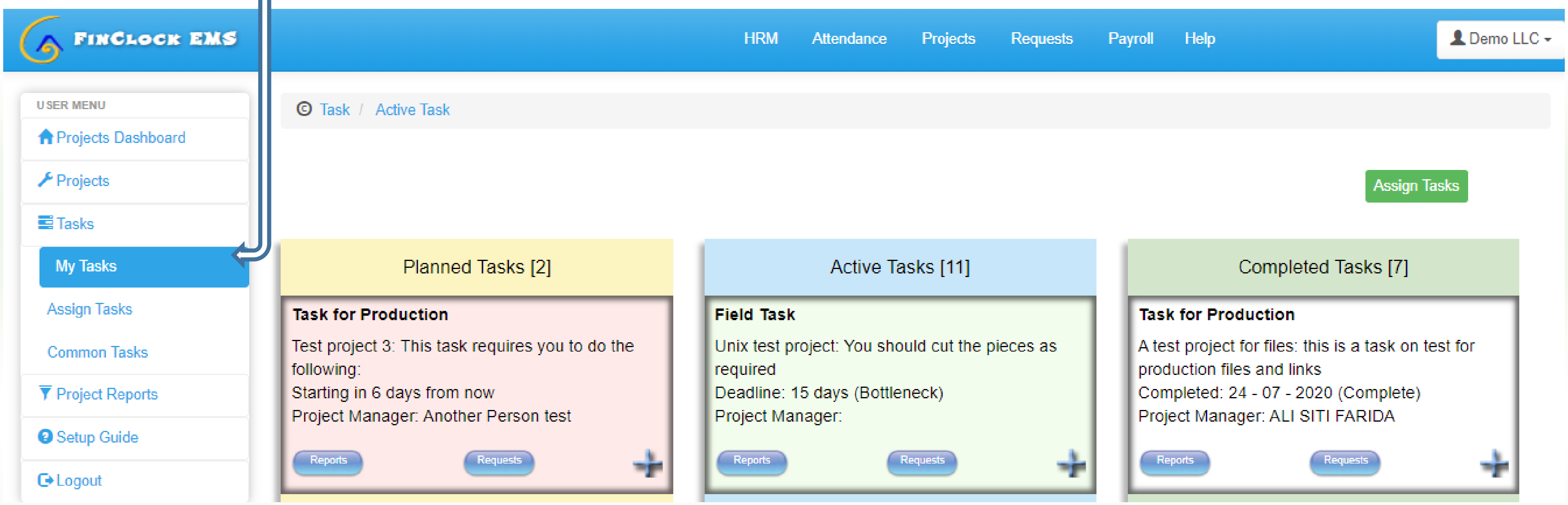


4. View Tasks

Step 4: View My Tasks

Now, you can see the task list under My Tasks page.

Also, the people you assigned tasks get SMS short message to their phone) and they can start working on the task.



3. Work Reporting and Changing Task Status

1. Add work report

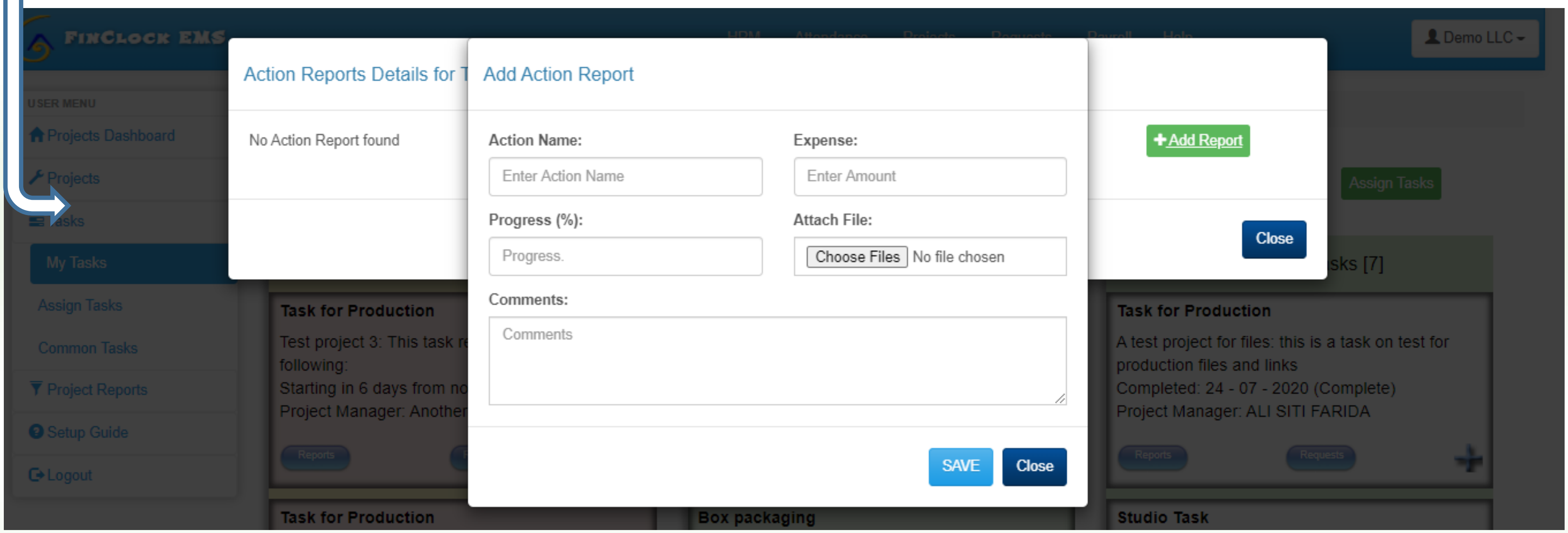
Step 1: Adding Work Reports

a. To add a task report, click on Reports button for the task you are working on and a popup will open.

b. Click on the “add report button” and now you can add a report about the work done.

- The Action name is the title of the report and expenses is the amount you spent on that work.
- Add percentage of the work you have done. E.g. If you are halfway done, then add progress as 50%.
- Add attachments and Add comments on the task, e.g. I have completed the first part of the task.

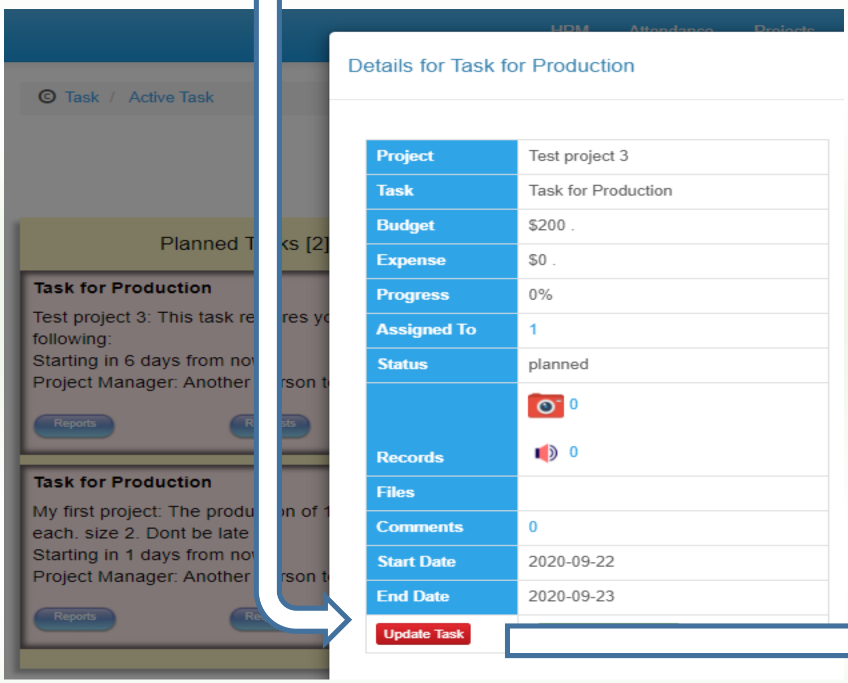
c. When Finished, click the ‘Save’ button.

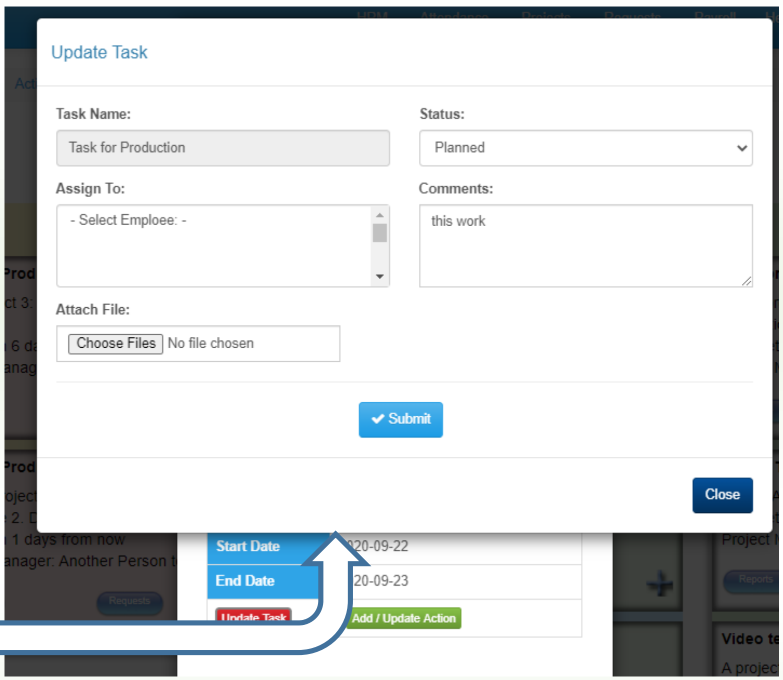


2. Change Task status

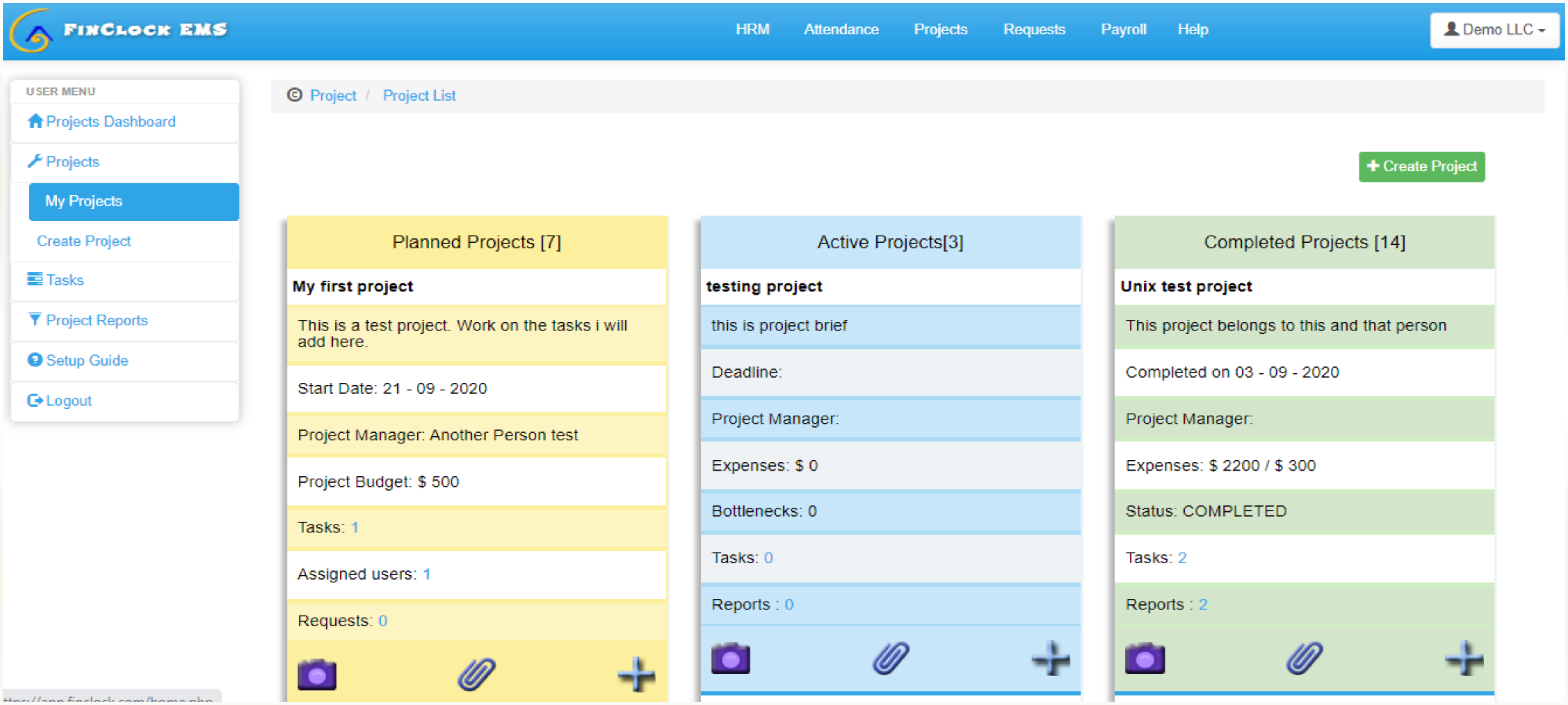
Step 1: Changing task status from Planned, Active, Completed.

1. Tasks under planned with automatically change to Active when the start date arrives.
2. You can also change task status by clicking on the **plus icon** on the task you wish to change status.
3. Then, scroll down and click on **update task** status button.
4. A popup will open, where you can select the new task status on top and click Submit button.
5. Your task will be moved to the new status and the project manager gets a SMS and Note, showing that you completed the task.



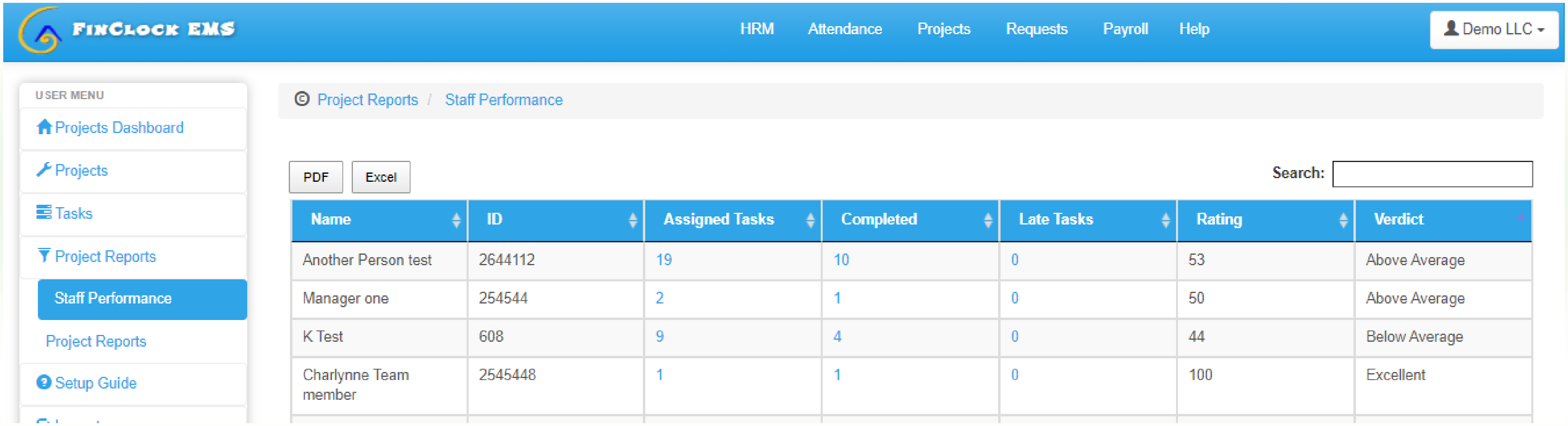


Monitoring Projects: (Planned, Active and Completed)



- Click on the number Next to tasks to see the tasks assigned under the project.
- Click on the number next to assigned users to see who is working on the which task under the project
- Click on number next to requests, to see what has been requested under the project
- Click on the number next to reports, to view all reports made under the project.
- To Change project Status, click on the Plus icon, then update button and change the status from planned, to active or completed.

Project Reports and Staff Performance



Name	ID	Assigned Tasks	Completed	Late Tasks	Rating	Verdict
Another Person test	2644112	19	10	0	53	Above Average
Manager one	254544	2	1	0	50	Above Average
K Test	608	9	4	0	44	Below Average
Charlynne Team member	2545448	1	1	0	100	Excellent

- Click on project reports, to see the staff performance and project performance reports.
- **Staff Performance report.** Click on staff performance sub menu and you will see a summary of staff performance. Here, you will see how many tasks each person has been assigned, how may they completed on time and how many late tasks per employee. Furthermore, you will see the performance rating per person. This report helps you to make managerial decision on work balance and commitment of your workers besides, you will be able to take actions on non-performing workers.
- **Project Reports.** When you click on project reports submenu, you will see a summary of the project, which includes the expenses, progress and timeliness. This report helps you to improve efficiency in your organization.