



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**

The screenshot displays the FinClock EMS interface. At the top, there is a navigation bar with the FinClock EMS logo on the left and menu items: HRM, Attendance, Projects, Requests, Payroll, and Help. On the right of the navigation bar, there is a user profile dropdown labeled "Demo LLC".

Below the navigation bar is a breadcrumb trail: "Project / Project List". On the right side of this area, there is a green button labeled "+ Create Project".

On the left side, there is a "USER MENU" sidebar with the following items: Projects Dashboard, Projects, My Projects (highlighted), Create Project, Tasks, Project Reports, Setup Guide, and Logout.

The main content area shows three project cards:

- Planned Projects [7]**: Card for "My first project". Description: "This is a test project. Work on the tasks i will add here." Start Date: 21 - 09 - 2020. Project Manager: Another Person test. Project Budget: \$ 500. Tasks: 1. Assigned users: 1. Requests: 0.
- Active Projects[3]**: Card for "testing project". Description: "this is project brief". Deadline: (empty). Project Manager: (empty). Expenses: \$ 0. Bottlenecks: 0. Tasks: 0. Reports : 0.
- Completed Projects [14]**: Card for "Unix test project". Description: "This project belongs to this and that person". Completed on 03 - 09 - 2020. Project Manager: (empty). Expenses: \$ 2200 / \$ 300. Status: COMPLETED. Tasks: 2. Reports : 2.

Each card has a footer with icons for a camera, a paperclip, and a plus sign.



1. Adding tasks commonly done in your organization

1
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.

FinClock EMS

HRM Attendance Projects Requests Payroll He

Demo LLC

Common Task / Common Task Flow

Department:
- Select Department - Search Clear

+ Create Task + My Tasks

Task	2nd Task	3rd Task	4th Task	5th Task	6th Task
Radio Operations	Production	Field Operations	News	Sales	News
Studio Task This task is about making plans for the work in studio	Task for Production this work	Box packaging This involves the packaging of the boxes.	Video tests this is to test a couple of things	A trial task This is a trial task	News Collection this task is about collecting news in the field



3

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.

The screenshot displays the FinClock EMS web application. A modal window is open in the center, titled "You are now adding a task, commonly done under the department". The modal contains the following fields:

- Department:** A dropdown menu with "Finance" selected.
- Common Task Name:** A text input field containing "001 Prepare Quotation".
- Common Task Description:** A text area containing "Preparing quotation after client makes a call".

At the bottom of the modal are two buttons: "Submit" (with a checkmark icon) and "Cancel".

In the background, the main interface is visible. On the left is a "USER MENU" with options: Projects Dashboard, Projects, Tasks, My Tasks, Assign Tasks, Common Tasks (highlighted), Project Reports, Setup Guide, and Logout. The main content area shows a "Department:" dropdown set to "Finance" and a table of tasks. The table has columns for task ID, name, and description. Visible tasks include "1st Task" (Studio Operations), "5th Task" (Sales), "6th Task" (News), and "7th Task" (Field Operations). A "My Tasks" button is also visible on the right side of the interface.



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**.

FinClock EMS HRM Attendance Projects Requests Payroll Help Den LLC

Post / Add Project

Project Name:

Budget:

Start Date: [Clear](#) **To Date:** [Clear](#)

Project Manager:

Project Brief:

Attach File: No file chosen

ADD File URL:



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**

The screenshot displays the FinClock interface. On the left is a sidebar with navigation options: Projects, My Projects, Create Project, Tasks, Project Reports, Setup Guide, and Logout. The main area shows a table of tasks. The 'Production' task is selected, and a modal window is open for setting its deadline and adding a brief. The modal contains fields for 'Start Date' and 'To Date', an 'Attach File' section, and a 'Task Brief' text area. An 'OK' button is at the bottom right of the modal. Below the table, a 'Save & Assign People' button is visible. A blue arrow points from the 'Production' task in the table to the modal window.

	Deadline	Action
		<button>New Task</button>
<input type="checkbox"/> Department		<button>Set Deadline</button>
<input type="checkbox"/> Tutorial		<button>Set Deadline</button>
<input type="checkbox"/> Operations		<button>Set Deadline</button>
<input type="checkbox"/> s		<button>Set Deadline</button>
<input type="checkbox"/> s		<button>Set Deadline</button>
<input type="checkbox"/> News		<button>Set Deadline</button>
<input type="checkbox"/> Field Operations		<button>Set Deadline</button>
<input checked="" type="checkbox"/> Production		<button>Set Deadline</button>
<input type="checkbox"/> Studio Operations		<button>Set Deadline</button>

Studio Task (This task is about making plans for the work in studio)

Save & Assign People



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.

You are now checking workload and Assigning the tasks to your team, under project: Test project 3

	Name	Job Category	Active Tasks	Work Load
<input type="checkbox"/>	ALI SITI FARIDA	News Editor (Bahari FM)	31	Low
<input checked="" type="checkbox"/>	Another Person test	News Presenter (Inooro FM)	18	Low
<input type="checkbox"/>	ARONI LAWRENCE NYAKUNDI	News presenter (Egesa FM)	0	Low
<input type="checkbox"/>	BONYO JOSEPH TOMAS ODHIAMBO	Editorial (Citizen TV)	0	Low
<input type="checkbox"/>	Charlynnne Team member	News Presenter (Inooro FM)	1	Low
<input type="checkbox"/>	CHOMBO KAREN JENNIS	TV Production (Inooro TV)	2	Low
<input type="checkbox"/>	K Test		9	Low
<input type="checkbox"/>	MACHARIA NAOMI WANJIKU	News Presenter (Inooro FM)	0	Low
<input type="checkbox"/>	Manager one		2	Low



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.

FINCLOCK EMS HRM Attendance Projects Requests Payroll Help Demo LLC

USER MENU
Projects Dashboard
Projects
Tasks
My Tasks
Assign Tasks
Common Tasks
Project Reports
Setup Guide
Logout

Task / Active Task

Assign Tasks

Planned Tasks [2]	Active Tasks [11]	Completed Tasks [7]
Task for Production Test project 3: This task requires you to do the following: Starting in 6 days from now Project Manager: Another Person test Reports Requests +	Field Task Unix test project: You should cut the pieces as required Deadline: 15 days (Bottleneck) Project Manager: Reports Requests +	Task for Production A test project for files: this is a task on test for production files and links Completed: 24 - 07 - 2020 (Complete) Project Manager: ALI SITI FARIDA Reports Requests +

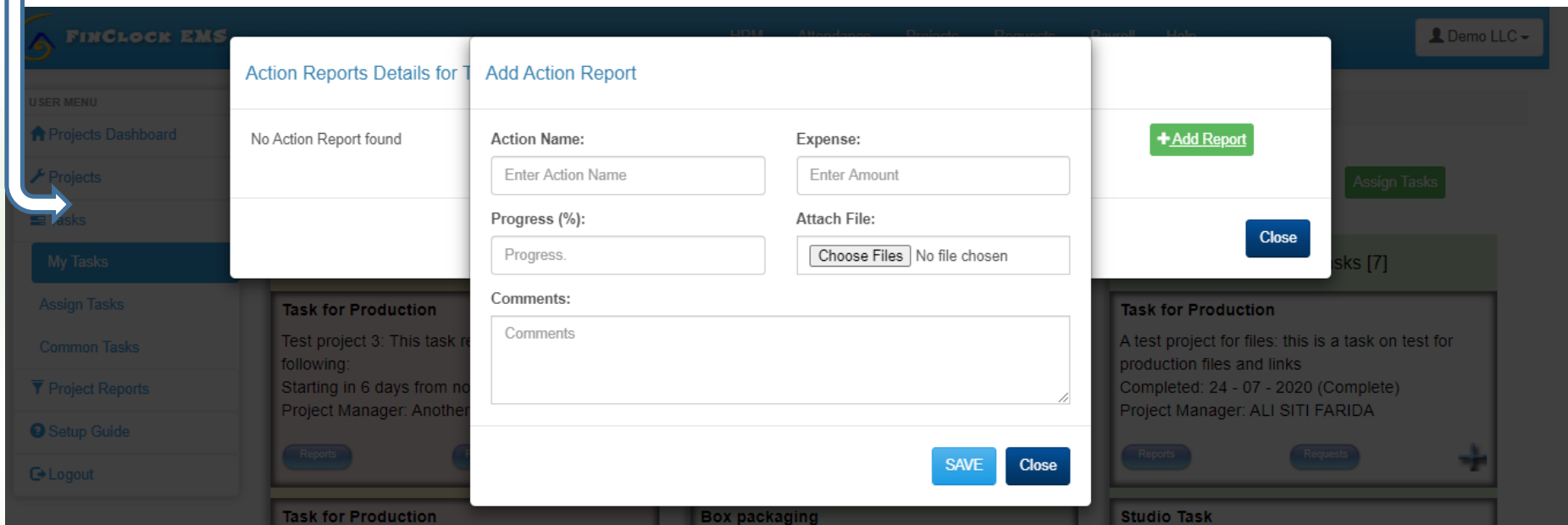


3. Work Reporting and Changing Task Status

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.

The screenshot displays the 'Details for Task for Production' interface. The task details are as follows:

Project	Test project 3
Task	Task for Production
Budget	\$200 .
Expense	\$0 .
Progress	0%
Assigned To	1
Status	planned
Records	0
Files	0
Comments	0
Start Date	2020-09-22
End Date	2020-09-23

The 'Update Task' popup is open, showing the following fields:

- Task Name: Task for Production 3
- Status: Planned
- Assign To: - Select Employee: -
- Comments: this work
- Attach File: Choose Files No file chosen

The 'Submit' button is visible at the bottom of the popup. The background shows a list of tasks with a plus icon on the right side of the task row, which is highlighted by a blue arrow pointing to the 'Update Task' button in the popup.



Monitoring Projects: (Planned, Active and Completed)

The screenshot displays the FinClock Project Management interface. At the top, there is a navigation bar with the FinClock EMS logo on the left and menu items: HRM, Attendance, Projects, Requests, Payroll, and Help. On the right of the navigation bar, there is a user profile dropdown for 'Demo LLC'. Below the navigation bar, a breadcrumb trail shows 'Project / Project List'. On the left side, there is a 'USER MENU' with options: Projects Dashboard, Projects, My Projects (highlighted), Create Project, Tasks, Project Reports, Setup Guide, and Logout. In the top right corner of the main content area, there is a '+ Create Project' button. The main content area is divided into three columns: 'Planned Projects [7]', 'Active Projects[3]', and 'Completed Projects [14]'. Each column displays a project card with details such as project name, description, start date, project manager, budget, tasks, assigned users, and requests. At the bottom of each project card, there are icons for a camera, a paperclip, and a plus sign.

- 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

The screenshot displays the FinClock EMS interface. The top navigation bar includes the FinClock EMS logo, navigation links for HRM, Attendance, Projects, Requests, Payroll, and Help, and a user profile dropdown for Demo LLC. The left sidebar contains a 'USER MENU' with options: Projects Dashboard, Projects, Tasks, Project Reports (expanded), Staff Performance (selected), Project Reports, and Setup Guide. The main content area shows the 'Project Reports / Staff Performance' page. It features a search bar and two export buttons: PDF and Excel. Below these is a table with the following data:

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
Charlyne 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 many 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.