



# FinClock Project Management Guide

- 1. **Manage projects and tasks** (with SMS notification)
- 2. **Automate project costing** (items, suppliers and margins).
- 3. **Real-time work reports** and update status of their tasks.
- 4. **Manage Project Costs** (Add Costs, revenue and profit/loss reports)
- 5. **Automated performance reports** (staff and projects).

**USER MENU**

- Projects Dashboard
- Projects
- Create Project
- My Projects**
- Projects Summary
- Tasks
- Items & Services
- Project Costs
- Project Reports
- Setup Guide
- Logout

Project / Project List

**+ Create Project**

Planned Projects [5]	Active Projects [8]	Completed Projects [23]
<b>A sample project</b>	<b>A project for Client A</b>	<b>Customer C Large scale project</b>
this project shows the reporting and task management under a project	This project is for client A, showing the costs management and financial reports	<ol style="list-style-type: none"><li>1. This project requires you to change this and that</li><li>2. Do not waste time</li><li>3. Be careful with the timelines</li></ol>
Start Date: 18 - 02 - 2021	Deadline: 0000-00-00	Completed on 04 - 04 - 2021
Project Manager: Another Person test	Project Manager: Another Person test	Project Manager: ALI SITI FARIDA
Project Quote: \$ 250	Expenses: \$ 0	Expenses: \$ 0 / \$ 2000
Tasks: 0	Bottlenecks: 1	Status: COMPLETED
Assigned users: 0	Tasks: 1	



# 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, showing a sidebar with "Common Tasks" selected, a "Department:" dropdown menu with "- Select Department" selected, and a list of tasks including "1st Task", "5th Task", and "6th 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**.

The screenshot displays the 'Add Project' interface in the FinClock EMS system. On the left, a 'USER MENU' sidebar contains options like 'Projects Dashboard', 'Projects', 'My Projects', 'Create Project' (highlighted), 'Tasks', 'Project Reports', 'Setup Guide', and 'Logout'. The top navigation bar includes 'HRM', 'Attendance', 'Projects', 'Requests', 'Payroll', and 'Help', with a user profile dropdown for 'De LLC'. The main content area is titled 'Post / Add Project' and contains the following form elements:

- Project Name:** A text input field with the placeholder 'Enter Project Name'.
- Budget:** A text input field with the placeholder 'Enter Budget'.
- Start Date:** A date picker with a 'Clear' button and the format 'dd/mm/yyyy'.
- To Date:** A date picker with a 'Clear' button and the format 'dd/mm/yyyy'.
- Project Manager:** A dropdown menu with the placeholder '- Select Project Manager -'.
- Project Brief:** A large text area for entering project details.
- Attach File:** A file upload button labeled 'Choose Files' with the text 'No file chosen'.
- ADD File URL:** A text input field for providing a file URL.

At the bottom of the form is a blue button labeled 'Save & Add Tasks'. Two blue arrows point from the instructional text boxes to the 'Create Project' menu item and the 'Save & Add Tasks' button, respectively.



### 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 'My Projects' section of the application. A table lists tasks with columns for 'Deadline' and 'Action'. The 'Production' task is selected, and a modal is open for setting its deadline and adding a task brief. The modal includes fields for 'Start Date' and 'To Date', an 'Attach File' section, and a 'Task Brief' text area. A 'Save & Assign People' button is visible at the bottom of the page.

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

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



### 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.

The screenshot shows the FinClock EMS interface. A modal window is open, titled "You are now checking workload and Assigning the tasks to your team, under project: Test project 3". The modal contains a table with the following data:

	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"/>	Charlynne 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

The background interface shows a sidebar with "My Projects" selected and an "Assign" button visible. The footer of the interface reads "© FinClock EMS 2016 - 2020" and "Powered by: FinClock EMS".



## 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.

The screenshot displays the 'My Tasks' page in the FinClock EMS system. The page is organized into three main columns: 'Planned Tasks [2]', 'Active Tasks [11]', and 'Completed Tasks [7]'. A blue arrow from the text box above points to the 'My Tasks' menu item in the left sidebar. The 'Planned Tasks' section shows a task titled 'Task for Production' with details: 'Test project 3: This task requires you to do the following: Starting in 6 days from now Project Manager: Another Person test'. The 'Active Tasks' section shows a task titled 'Field Task' with details: 'Unix test project: You should cut the pieces as required Deadline: 15 days (Bottleneck) Project Manager:'. The 'Completed Tasks' section shows a task titled 'Task for Production' with details: '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'. Each task card includes 'Reports' and 'Requests' buttons and a plus icon. A green 'Assign Tasks' button is located in the top right of the task area. The top navigation bar includes HRM, Attendance, Projects, Requests, Payroll, Help, and a user profile 'Demo LLC'.

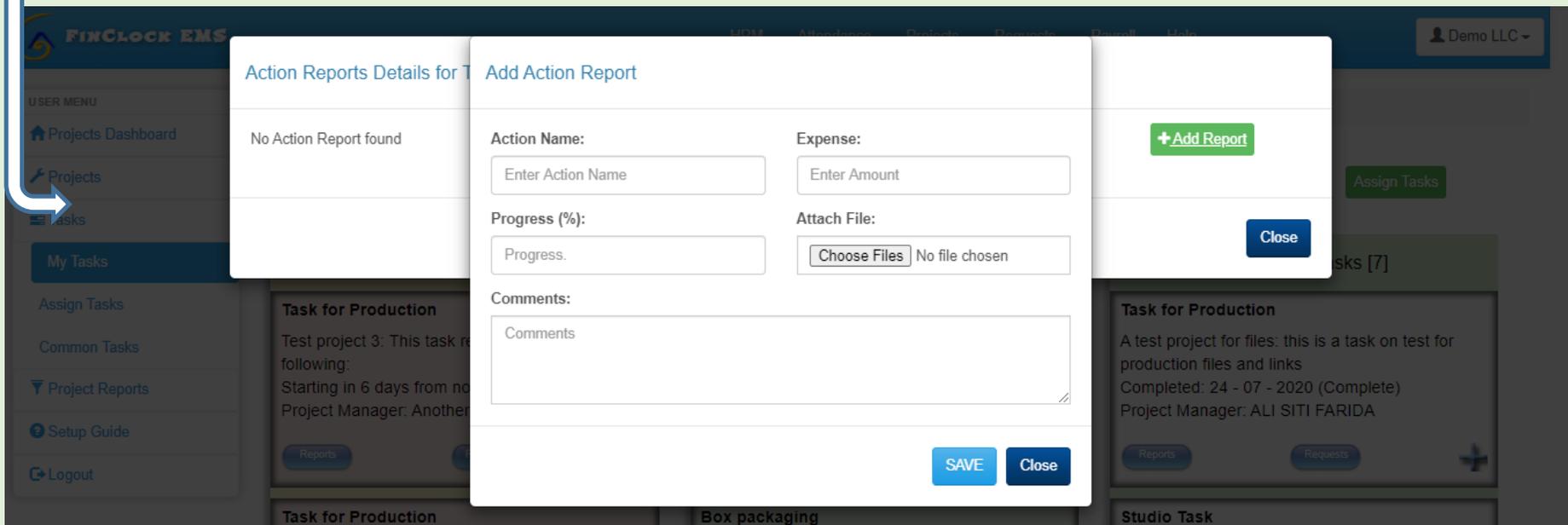


### 3. Work Reporting and Changing Task Status

#### 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 illustrates the process of updating a task status. On the left, a task card for 'Task for Production' is shown with a plus icon. An arrow points from this icon to a 'Details for Task for Production' popup. This popup contains a table with the following data:

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

Below the table is an 'Update Task' button. An arrow points from this button to a larger 'Update Task' popup on the right. This popup contains the following fields:

- Task Name: Task for Production
- Status: Planned (dropdown menu)
- Assign To: - Select Employee: - (dropdown menu)
- Comments: this work (text area)
- Attach File: Choose Files (button) No file chosen
- Submit (button)
- Close (button)

At the bottom of the 'Update Task' popup, there are three buttons: 'Start Date' (with a date of 2020-09-22), 'End Date' (with a date of 2020-09-23), and 'Add / Update Action'.



## Monitoring Projects: (Planned, Active and Completed)

The screenshot displays the FinClock Project Management interface. At the top, there is a blue 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 tasks assigned under the project.
- Click on the number next to assigned users to see who is working on 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.



# Manage Project Costs (Items/services, Costing and financial reports)

## 1. Manage Items/services and suppliers

Sr No.	Item Code	Category Name	Item Name	Unit	Internal Cost(\$)	Supplier(s)	Selling Price	Sample	Action
1	101 FinClock	software modules	PMS	User	3	1	0		<a href="#">Edit</a> <a href="#">Delete</a>

- Add items/services by clicking the Item/Services page on the left menu
- Start by adding item categories.
- Add Items under the categories including the Internal costs
- Assign Items to Suppliers



## 2. Manage Project Costs

USER MENU

- Projects Dashboard
- Projects
- Tasks
- Items & Services
- Project Costs
- Clients
- Manage Costs
- Create Invoice

Project Costing

PDF Excel Search:

Sr No	Project Name	Client	Task	Status	Quoted(\$)	Costs(\$)	Edit	Action
1	A test project for now	Agnes mueni	1	Planned	120	180	<a href="#">Add Cost</a> <a href="#">Edit Project</a>	<a href="#">Assign Client</a> <a href="#">Send Note</a>
2	Today Project	Agnes mueni	4	Complete	250	0	<a href="#">Add Cost</a> <a href="#">Edit Project</a>	<a href="#">Assign Client</a> <a href="#">Send Note</a>

- Select Project costs on the left menu
- Select the project, whose costs you wish to manage
- Select the Items you wish to add and the quantities.
- The costs are automatically calculated against the set project budget
- You may download the project costs in PDF or Excel.



# 1. Project Financial Reports

USER MENU

- Projects Dashboard
- Projects
- Tasks
- Items & Services
- Project Costs
- Project Reports
- Staff Performance
- Project Reports
- Financial Reports**
- Setup Guide

Project Costing

PDF Excel Search:

Code	Project Name	Client	Tasks	Status	Quoted(\$)	Costs(\$)	Income	% Profit
1	A test project for now	Agnes mueni	1	Planned	120	180		
2	Today Project	Agnes mueni	4	Complete	250	0		
3	Latest Project 295	Peter Jones	4	Complete	1500	0		
4	Today Test Project		5	Complete	500	0		
5	A big test project		13	Complete	250	0		
6	project ABC		2	Complete	25	0		
7	test 104		2	Complete	250	0		

- Click the Project reports on the left menu
- Select Financial reports
- You will see the financial reports for the projects (Budget, Project Costs, and Profit/loss)
- Download reports in PDF or Excel and make decisions to grow.



## Staff Performance Reports

The screenshot displays the 'Staff Performance' report in the FinClock EMS system. The interface includes a top navigation bar with 'HRM', 'Attendance', 'Projects', 'Requests', 'Payroll', and 'Help' menus, and a user profile 'Demo LLC'. A left sidebar contains a 'USER MENU' with options like 'Projects Dashboard', 'Projects', 'Tasks', 'Project Reports', 'Staff Performance', 'Project Reports', and 'Setup Guide'. The main content area shows a breadcrumb trail 'Project Reports / Staff Performance', a search bar, and two buttons for '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 decisions 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.



## Bonus!

### Lock Projects to only few users

- Some projects should only be viewed by selected users in your organization.
- For example, it may be unwise to let juniors view a project involving decision makers only.
- To lock a project to a select viewers only, go to Tasks and **select assign users**.
- Under assign users, you will see the projects and next to it, a **Lock icon**.
- Click on the lock icon and select the **users who should see the project**.
- When done, click **Save**
- This way, only the selected people will see the project.

USER MENU

- Projects Dashboard
- Projects
- Tasks
- My Tasks
- Assign Tasks**
- Common Tasks

HRM Attendance Projects Payroll Notes Settings User Guide Demo LLC

Project / Assign Tasks

PDF Excel Search:

Project Name	Project Brief	Tasks	Action
A big test project	I need some adjustments	6	Select
A day of new time	This And that	2	Select
A fitting test	A brief	3	Select



Need Help?

Contact support team:

<https://finclock.com/contacts/>

Business Growth Tools