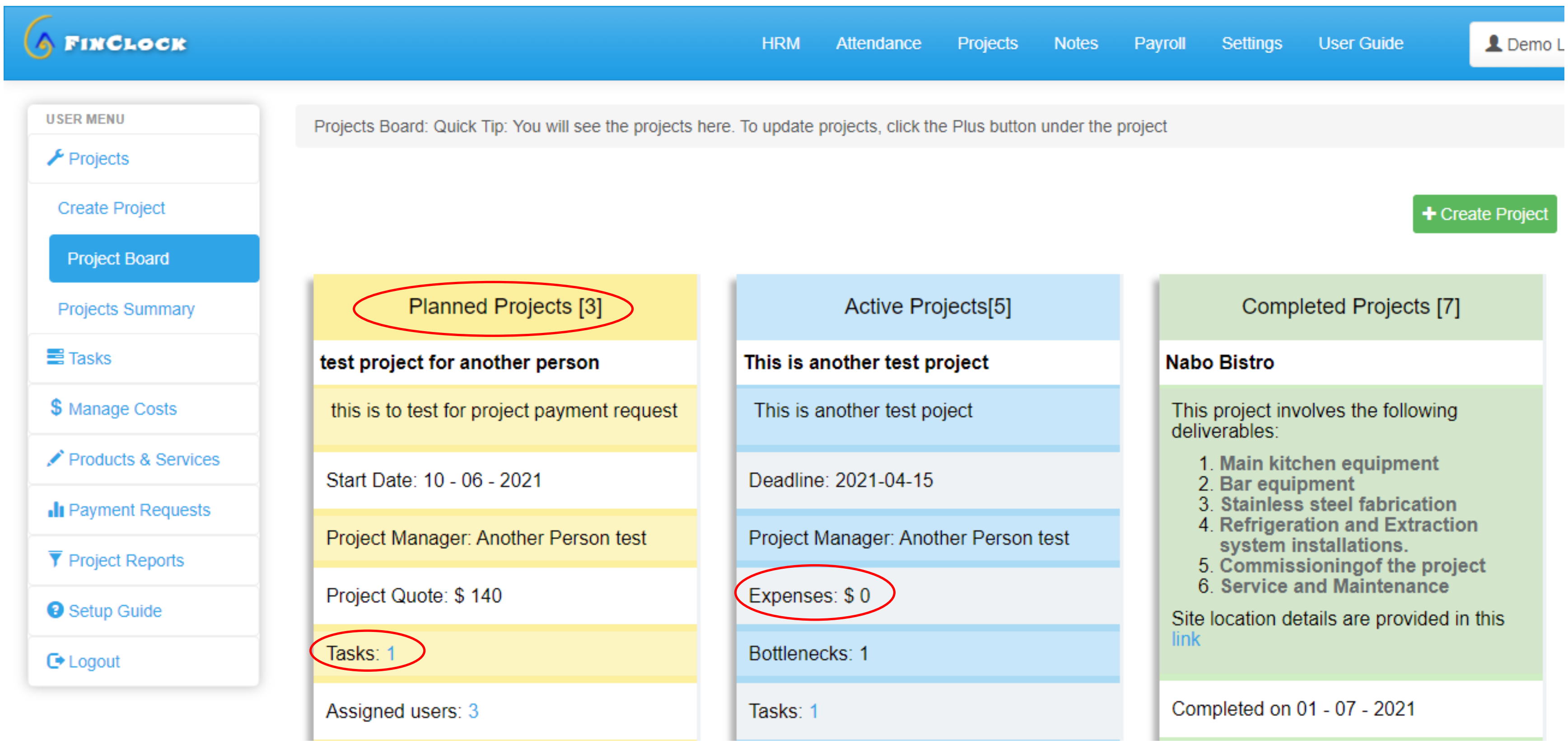
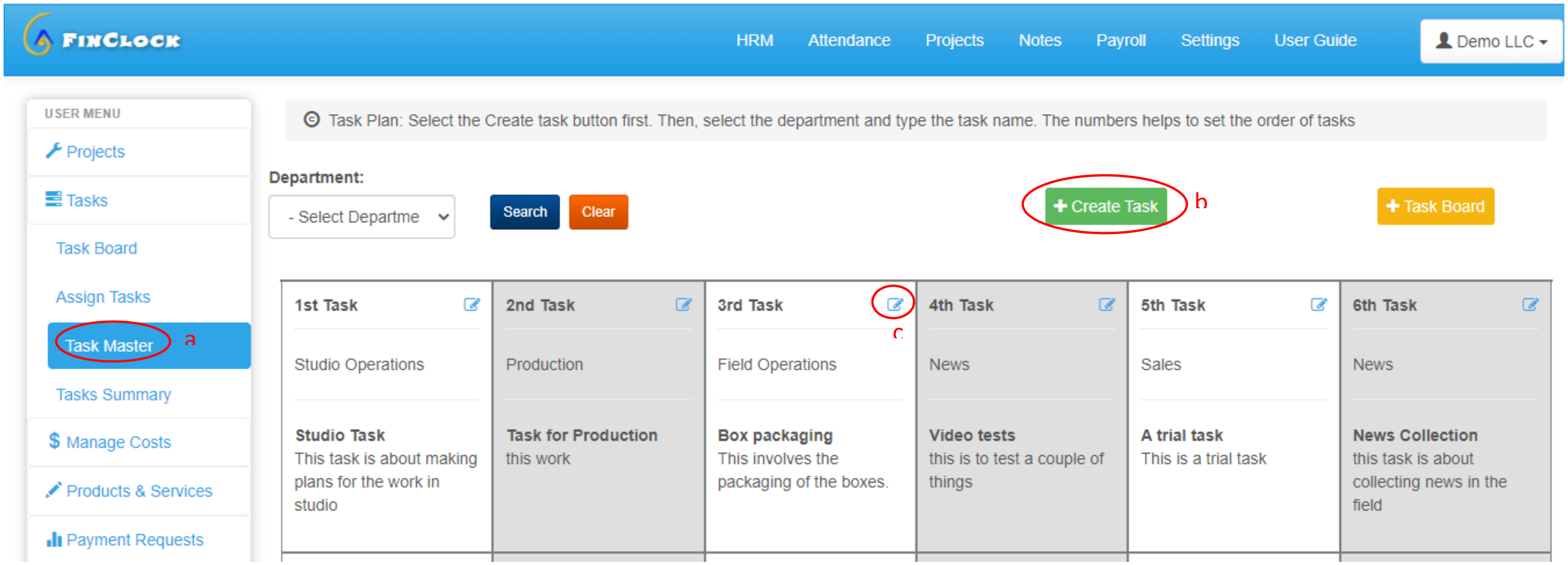
Managing Projects and Tasks

Goals:

⇨ Organize work flow in your organization.
⇨ Create projects and tasks
⇨ Work reports and instant communication
⇨ Project progress and expenses reports
⇨ Staff performance reports



Step 1: Create tasks on the Task Master page



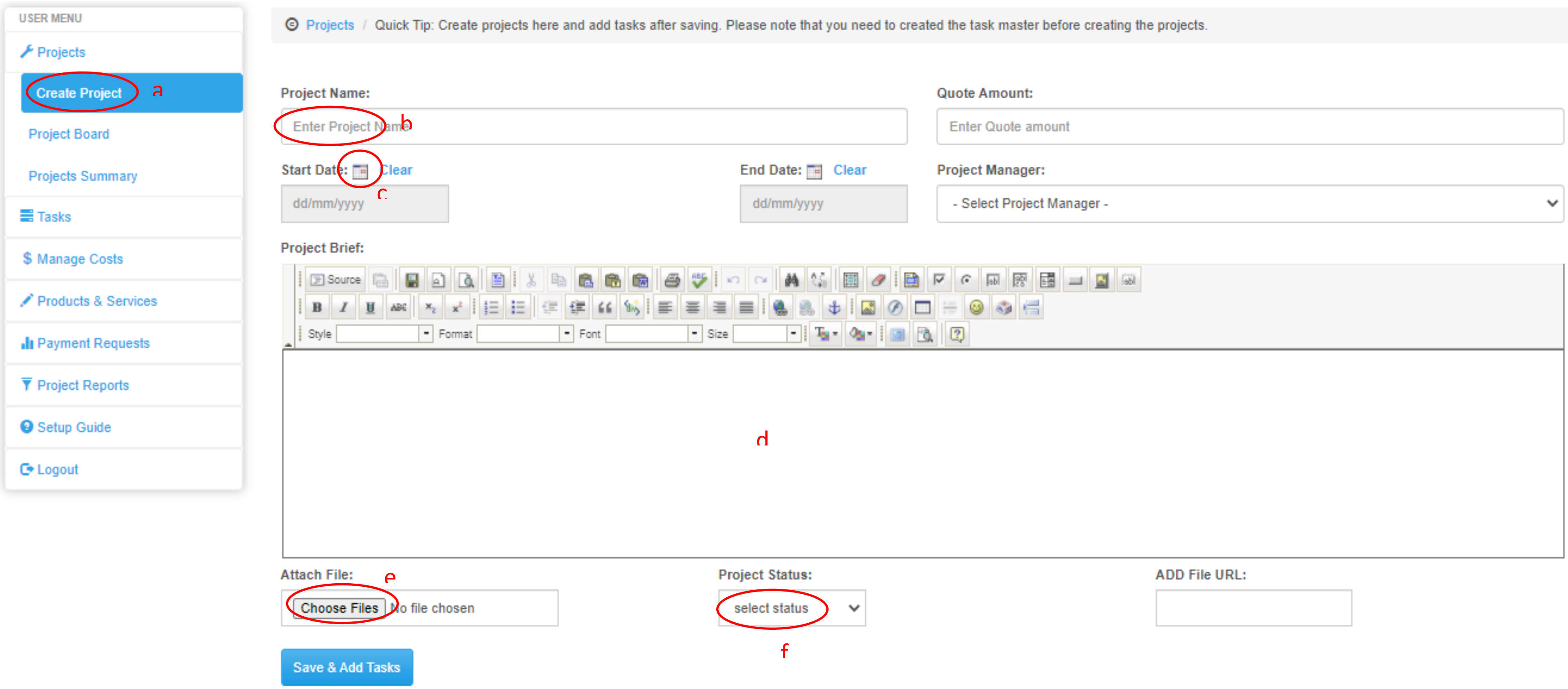
➔ **Why create tasks on the taskmaster page?**

The main tasks need to be organized under the departments to enable you to assign them to people in different projects. This is a one-time setup process that will help save a lot of your time in the future.

➔ **How do I create tasks in the taskmaster?**

a. Click the taskmaster Under tasks menu on the left
b. Click the green button called to create the task.
c. In the popup select the department, then add the task name and save.
d. The task created will appear in the taskmaster list starting with the 1st task.
e. If you wish to change the order of the tasks, click on the edit icon in the top right corner of the task.

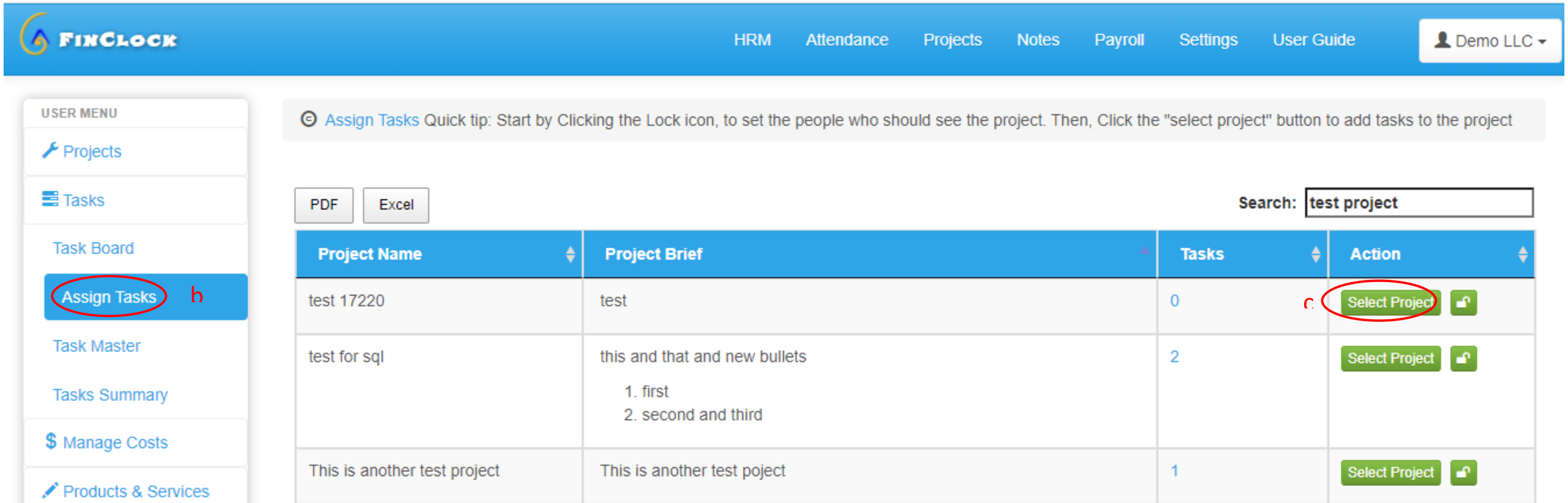
Step 2: Create Projects



➔ **How do I create a project?**

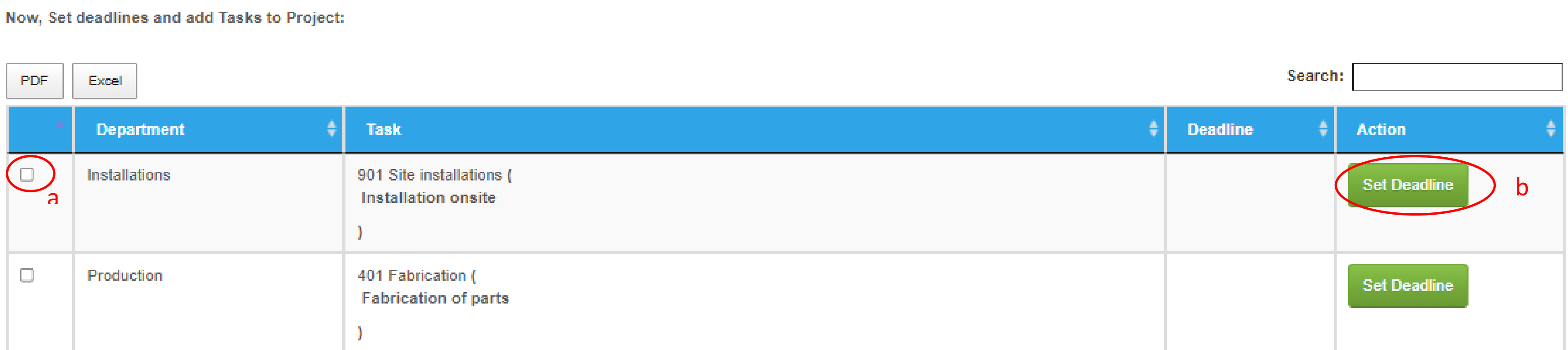
a. Click the Create Project Page under the Projects menu
b. Add Project Name, the quoted/budget amount.
c. Select the start date, end date, and the project manager
d. Add the project brief, whereby you can include links and formatting.
e. Attach Files
f. Select project stage
g. Click the save and add tasks button

Step 3: Assign Tasks to Your Team



Part 1. How to assign tasks to your team

a. When you create the project, you are automatically redirected to the assign tasks page and you can proceed to assign tasks.
b. Another option is to click on assign tasks under tasks, which you may use to add more tasks to the projects.
c. Click the select the project button and proceed to add assign the tasks as explained on the next page.



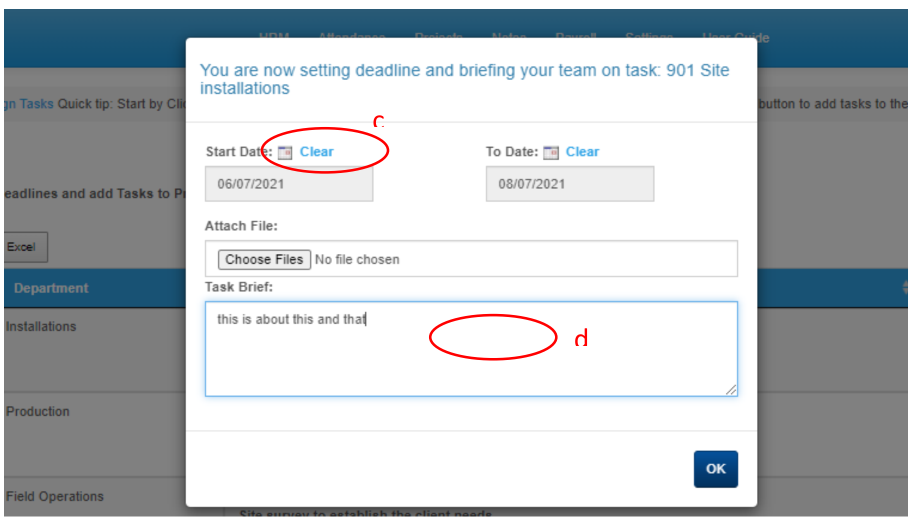
a. Select the task on the left column in the table.

b. Click the set deadline button to open a popup.

c. Select the start and end date of the task.

d. Add the comments, attach documents and click OK.

e. After setting deadlines to the task, scroll down and click the Next button at the bottom of the page.



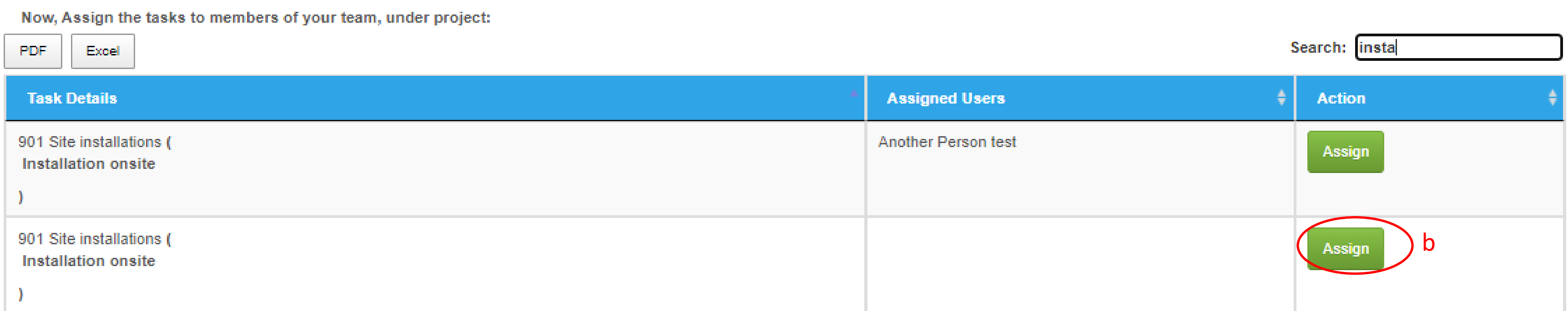
Part 2: Assign tasks per the workload

➔ How it works

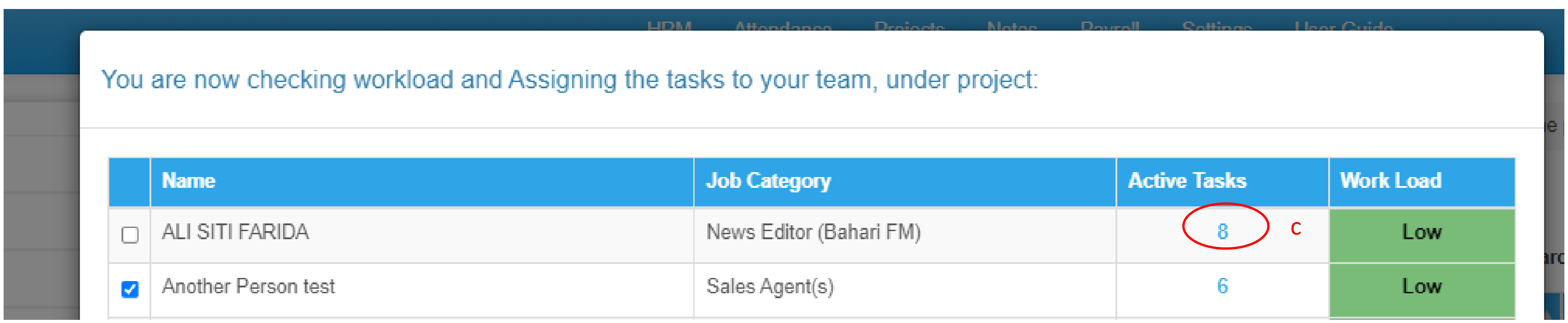
Finclock will automatically analyze the active task of each employee and help you to assign more tasks to people with the least workload. This way, work balance is attained and improves the performance of your team.

➔ How to assign tasks per workload.

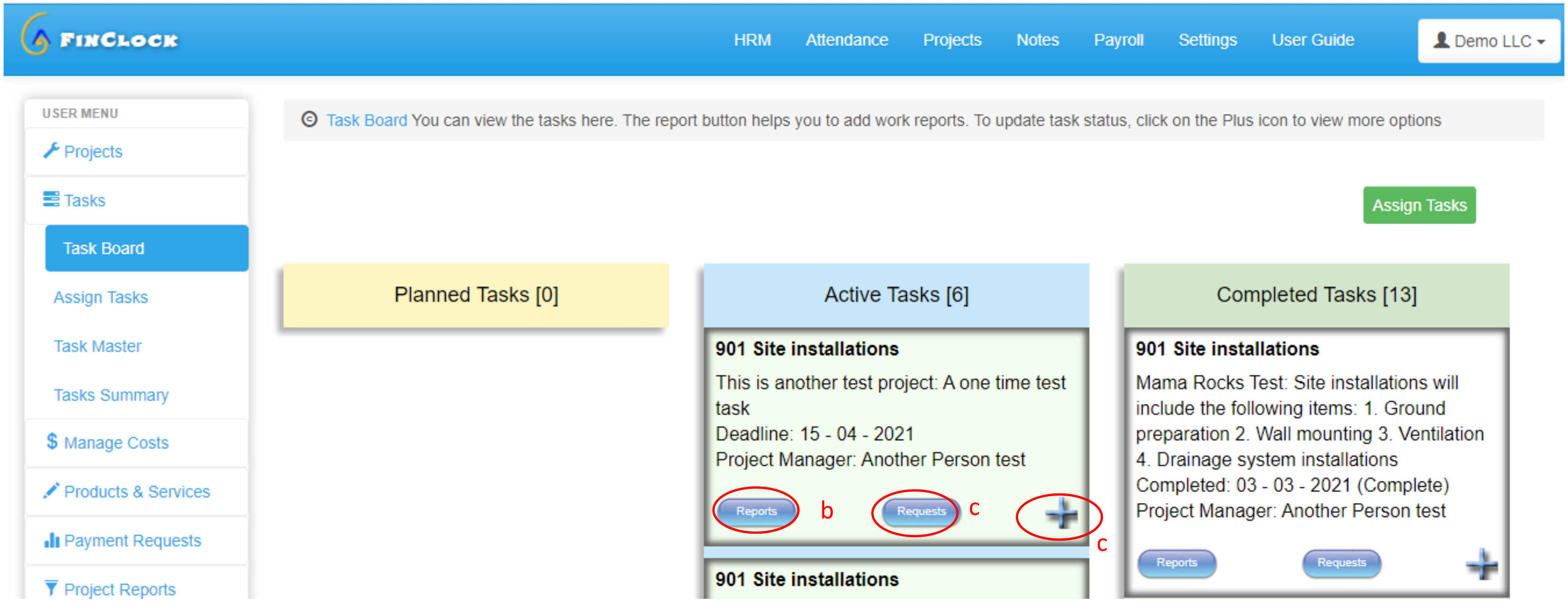
a. When you click the next button after selecting tasks and setting deadlines the page opens as shown in the screenshot below.
b. Click on the assign button which opens the workload popup



c. On the workload popup, choose the people to work on the task, then **scroll down** and click the **Save Button**
d. Click the Finish button to complete the process.



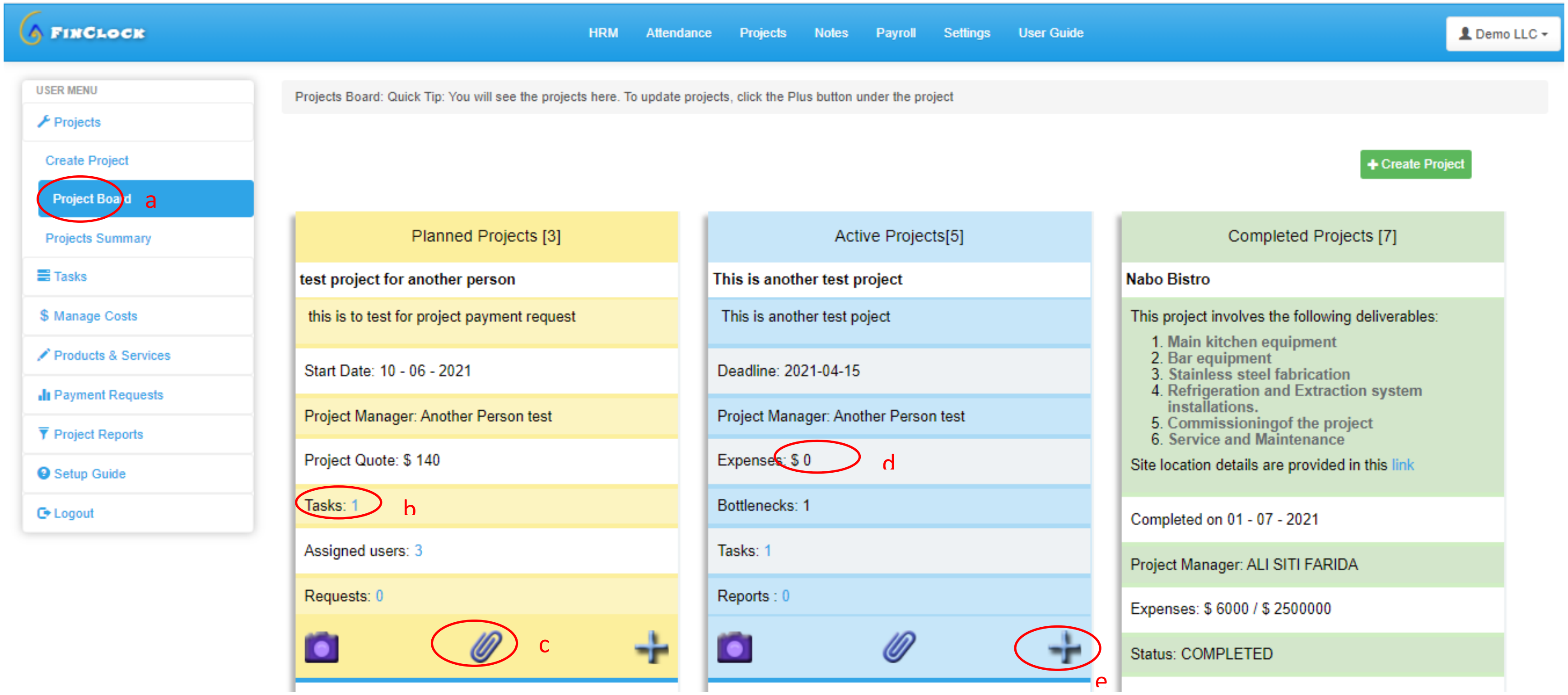
Step 4: Review Tasks and Work Reports



➔ **How it Works**

a. When people are assigned tasks, they will get SMS and Email notifications. Then, they will log in to their account and view the tasks under the task board.
b. The team members can click on the reports button and add work reports, including the expenses, file attachments, and comments.
c. The team members can click on the Requests button and make an instant request to other members of the team or the management.
d. The team members can click on the plus button to update the status of the task, e.g. change the task status from active to complete.
e. Project managers and admin will see all tasks and can review the reports which make the work easy, fast, and efficient.

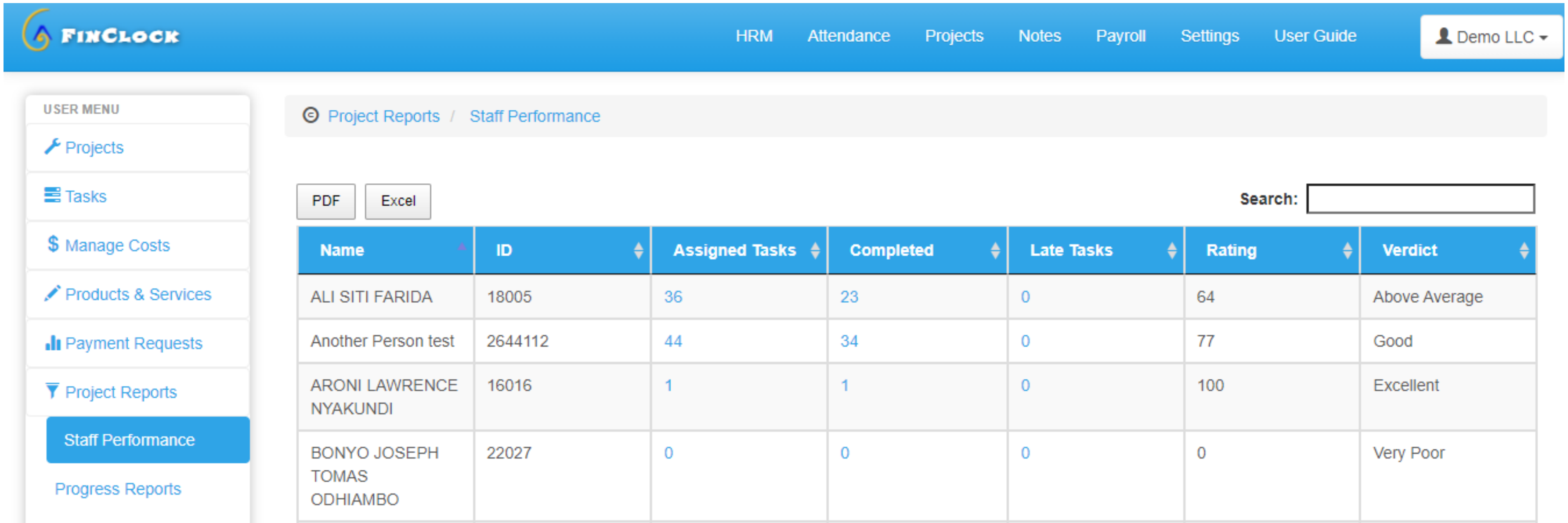
Step 4: Review and Update Projects



How it Works

a. You may review the tasks under a project by clicking the blue number next to the tasks as shown above
b. You may review the people assigned work under a project by clicking the blue number under assigned users.
c. You may review the files attached by clicking the attachment icon.
d. The expenses recorded in each task are automatically included in the total project expenses as you can see in the active and completed projects above.
e. To view more details and update project status, click the plus icon.

Step 5: Staff Performance Reports



- ➔ The staff performance reports are automatically generated based on the assigned, completed and the late tasks.
- ➔ To download the staff performance report, go to the project reports on the left menu and select staff performance page.
- ➔ You can use these reports for performance evaluation, staff appraisals and reassignment to ensure work balance.

Need help?

Chat with the support team or book a meeting.

[Book Meeting here]

Email: support@finclock.com