

## 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

Projects Board: Quick Tip: You will see the projects here. To update projects, click the Plus button under the project

[+ Create Project](#)

Planned Projects [3]	Active Projects [5]	Completed Projects [7]
<b>test project for another person</b>	<b>This is another test project</b>	<b>Nabo Bistro</b>
this is to test for project payment request	This is another test project	This project involves the following deliverables:
Start Date: 10 - 06 - 2021	Deadline: 2021-04-15	<ol style="list-style-type: none"><li>1. Main kitchen equipment</li><li>2. Bar equipment</li><li>3. Stainless steel fabrication</li><li>4. Refrigeration and Extraction system installations.</li><li>5. Commissioning of the project</li><li>6. Service and Maintenance</li></ol>
Project Manager: Another Person test	Project Manager: Another Person test	Site location details are provided in this <a href="#">link</a>
Project Quote: \$ 140	Expenses: \$ 0	Completed on 01 - 07 - 2021
Tasks: 1	Bottlenecks: 1	
Assigned users: 3	Tasks: 1	



## Step 1: Create tasks on the Task Master page

Task Plan: Select the Create task button first. Then, select the department and type the task name. The numbers helps to set the order of tasks

Department: - Select Department Search Clear + Create Task h + Task Board

1st Task	2nd Task	3rd Task	4th Task	5th Task	6th Task
Studio Operations	Production	Field Operations	News	Sales	News
<b>Studio Task</b> This task is about making plans for the work in studio	<b>Task for Production</b> this work	<b>Box packaging</b> This involves the packaging of the boxes.	<b>Video tests</b> this is to test a couple of things	<b>A trial task</b> This is a trial task	<b>News Collection</b> this task is about collecting news in the field

### → 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?

- Click the taskmaster Under tasks menu on the left
- Click the green button called to create the task.
- In the popup select the department, then add the task name and save.
- The task created will appear in the taskmaster list starting with the 1<sup>st</sup> task.
- 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

The screenshot shows the 'Create Projects' form with the following elements and annotations:

- USER MENU:** A sidebar menu on the left with 'Create Project' circled in red and labeled 'a'.
- Header:** 'Projects / Quick Tip: Create projects here and add tasks after saving. Please note that you need to created the task master before creating the projects.'
- Project Name:** A text input field with 'Enter Project Name' and a red circle 'b' around it.
- Quote Amount:** A text input field with 'Enter Quote amount'.
- Start Date:** A date picker with 'Clear' and a red circle 'c' around it.
- End Date:** A date picker with 'Clear'.
- Project Manager:** A dropdown menu with '- Select Project Manager -' and a downward arrow.
- Project Brief:** A rich text editor with a toolbar and a large empty text area labeled 'd'.
- Attach File:** A file upload button with 'Choose Files' circled in red and labeled 'e'.
- Project Status:** A dropdown menu with 'select status' circled in red and labeled 'f'.
- ADD File URL:** A text input field.
- Save & Add Tasks:** A blue button at the bottom.

### → 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

USER MENU

- Projects
- Tasks
- Task Board
- Assign Tasks** h
- Task Master
- Tasks Summary
- Manage Costs
- Products & Services

Assign Tasks Quick tip: Start by Clicking the Lock icon, to set the people who should see the project. Then, Click the "select project" button to add tasks to the project

PDF Excel Search: test project

Project Name	Project Brief	Tasks	Action
test 17220	test	0	Select Project
test for sql	this and that and new bullets 1. first 2. second and third	2	Select Project
This is another test project	This is another test poject	1	Select Project

### Part 1. How to assign tasks to your team

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



Now, Set deadlines and add Tasks to Project:

PDF Excel Search:

	Department	Task	Deadline	Action
<input type="checkbox"/> a	Installations	901 Site installations ( Installation onsite )		<input type="button" value="Set Deadline"/> b
<input type="checkbox"/>	Production	401 Fabrication ( Fabrication of parts )		<input type="button" value="Set Deadline"/>

- Select the task on the left column in the table.
- Click the set deadline button to open a popup.
- Select the start and end date of the task.
- Add the comments, attach documents and click OK.
- After setting deadlines to the task, scroll down and click the Next button at the bottom of the page.

You are now setting deadline and briefing your team on task: 901 Site installations

Start Date:   To Date:

Attach File:  No file chosen

Task Brief:  d



## 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.

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

Now, Assign the tasks to members of your team, under project:

PDF Excel Search:

Task Details	Assigned Users	Action
901 Site installations ( Installation onsite )	Another Person test	<input type="button" value="Assign"/>
901 Site installations ( Installation onsite )		<input type="button" value="Assign"/> <b>b</b>

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

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

	Name	Job Category	Active Tasks	Work Load
<input type="checkbox"/>	ALI SITI FARIDA	News Editor (Bahari FM)	<b>8</b> <b>c</b>	Low
<input checked="" type="checkbox"/>	Another Person test	Sales Agent(s)	6	Low



## Step 4: Review Tasks and Work Reports

### → How it Works

- 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.
- The team members can click on the reports button and add work reports, including the expenses, file attachments, and comments.
- The team members can click on the Requests button and make an instant request to other members of the team or the management.
- 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.
- 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

Projects Board: Quick Tip: You will see the projects here. To update projects, click the Plus button under the project

+ Create Project

Planned Projects [3]	Active Projects [5]	Completed Projects [7]
<b>test project for another person</b>	<b>This is another test project</b>	<b>Nabo Bistro</b>
this is to test for project payment request	This is another test project	This project involves the following deliverables: 1. Main kitchen equipment 2. Bar equipment 3. Stainless steel fabrication 4. Refrigeration and Extraction system installations. 5. Commissioning of the project 6. Service and Maintenance Site location details are provided in this <a href="#">link</a>
Start Date: 10 - 06 - 2021	Deadline: 2021-04-15	Completed on 01 - 07 - 2021
Project Manager: Another Person test	Project Manager: Another Person test	Project Manager: ALI SITI FARIDA
Project Quote: \$ 140	Expenses: \$ 0	Expenses: \$ 6000 / \$ 2500000
Tasks: 1	Bottlenecks: 1	Status: COMPLETED
Assigned users: 3	Tasks: 1	
Requests: 0	Reports: 0	

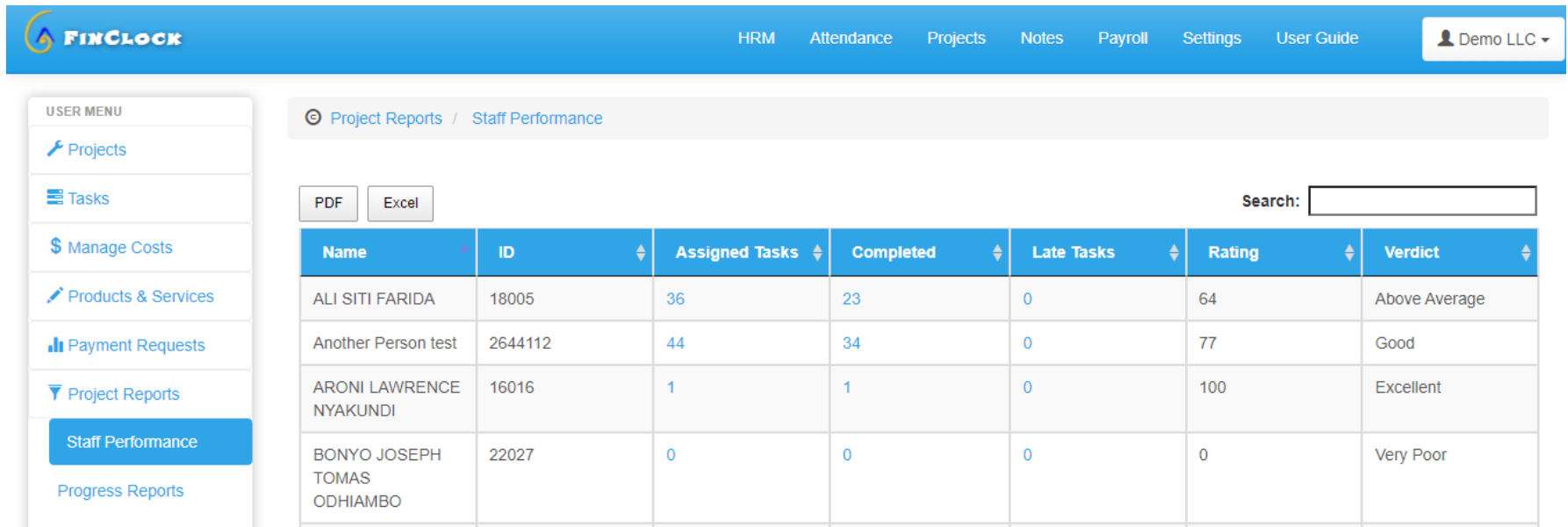
### How it Works

- You may review the tasks under a project by clicking the blue number next to the tasks as shown above
- You may review the people assigned work under a project by clicking the blue number under assigned users.
- You may review the files attached by clicking the attachment icon.
- 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.
- To view more details and update project status, click the plus icon.





## Step 5: Staff Performance Reports



USER MENU

- Projects
- Tasks
- Manage Costs
- Products & Services
- Payment Requests
- Project Reports
  - Staff Performance**
  - Progress Reports

Project Reports / Staff Performance

PDF Excel Search:

Name	ID	Assigned Tasks	Completed	Late Tasks	Rating	Verdict
ALI SITI FARIDA	18005	36	23	0	64	Above Average
Another Person test	2644112	44	34	0	77	Good
ARONI LAWRENCE NYAKUNDI	16016	1	1	0	100	Excellent
BONYO JOSEPH TOMAS ODHIAMBO	22027	0	0	0	0	Very Poor

- 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](mailto:support@finclock.com)

