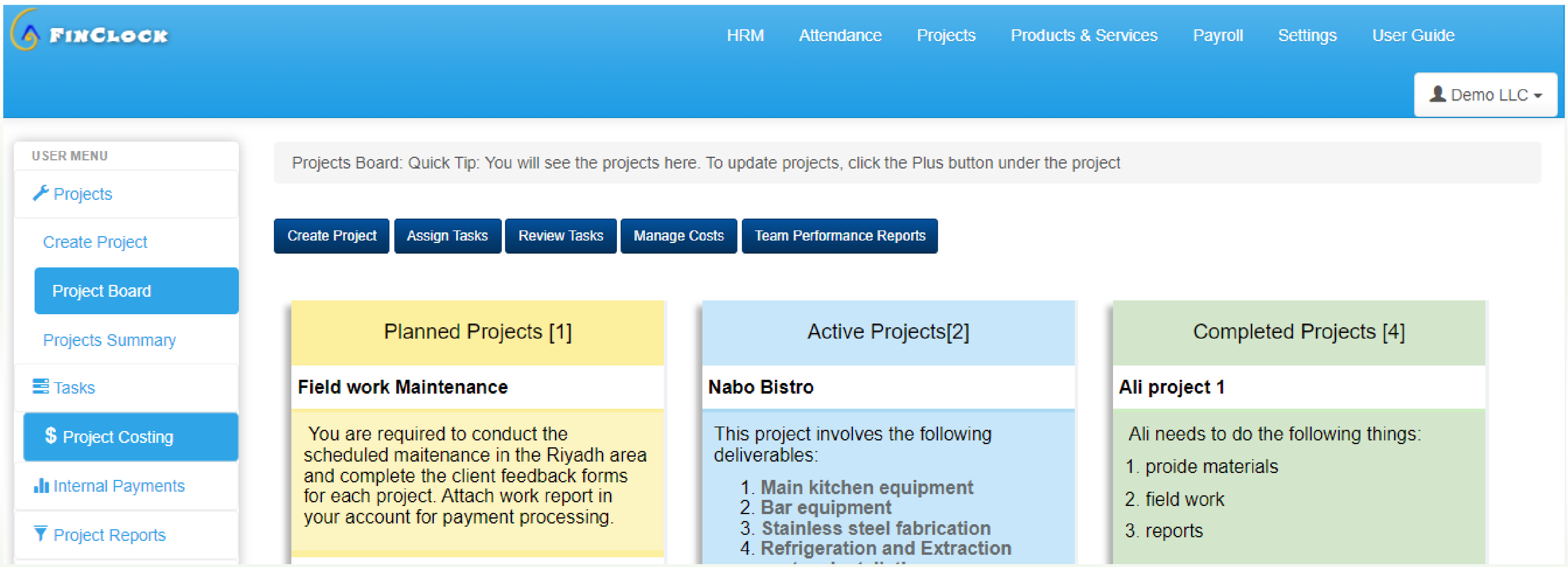
FinClock Guide: Project Management

Goals:

1. **Managers** Create projects and assign tasks to your team (with SMS notification)
2. **Team Members** make **work reports** and update work status.
3. **Managers** evaluate project reports for staff and project performance
4. **Project Managers** manage project costs.
5. **Management** gets Profit/Loss reports per project



1. Creating Projects and Assigning tasks to team members

1

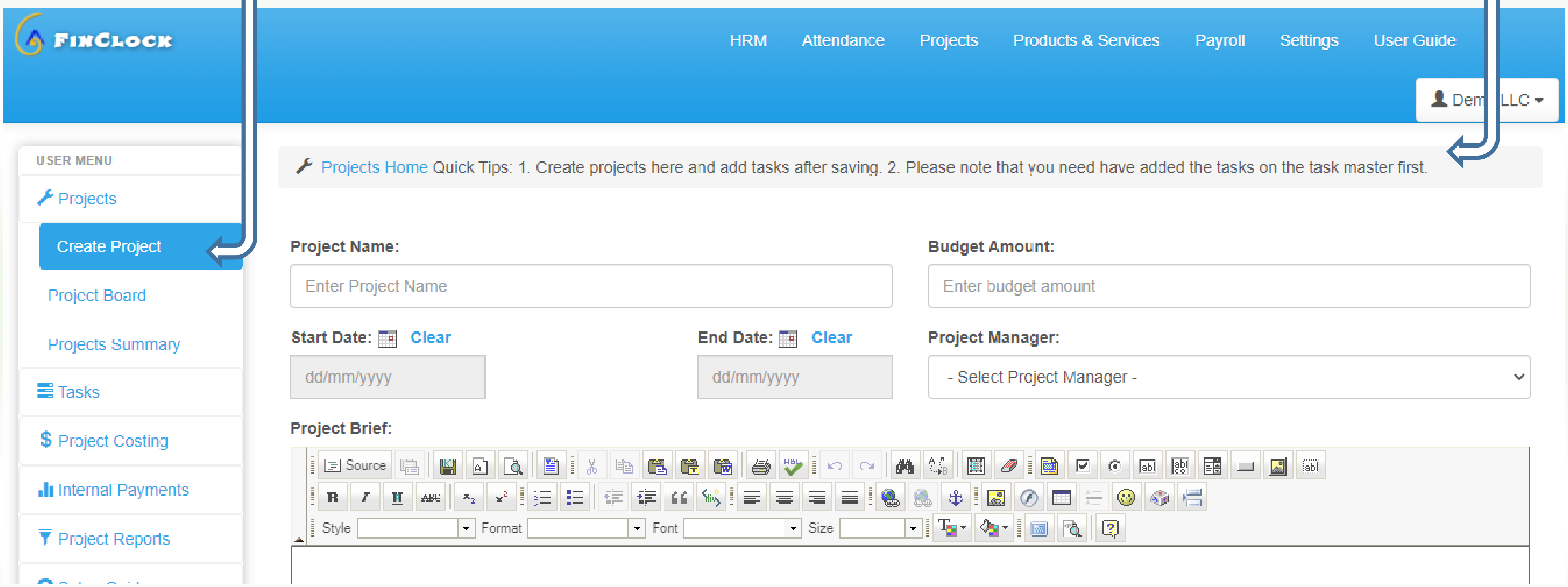
Step 1: Create project page

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

2. Add project

Step 2: Add Project Details

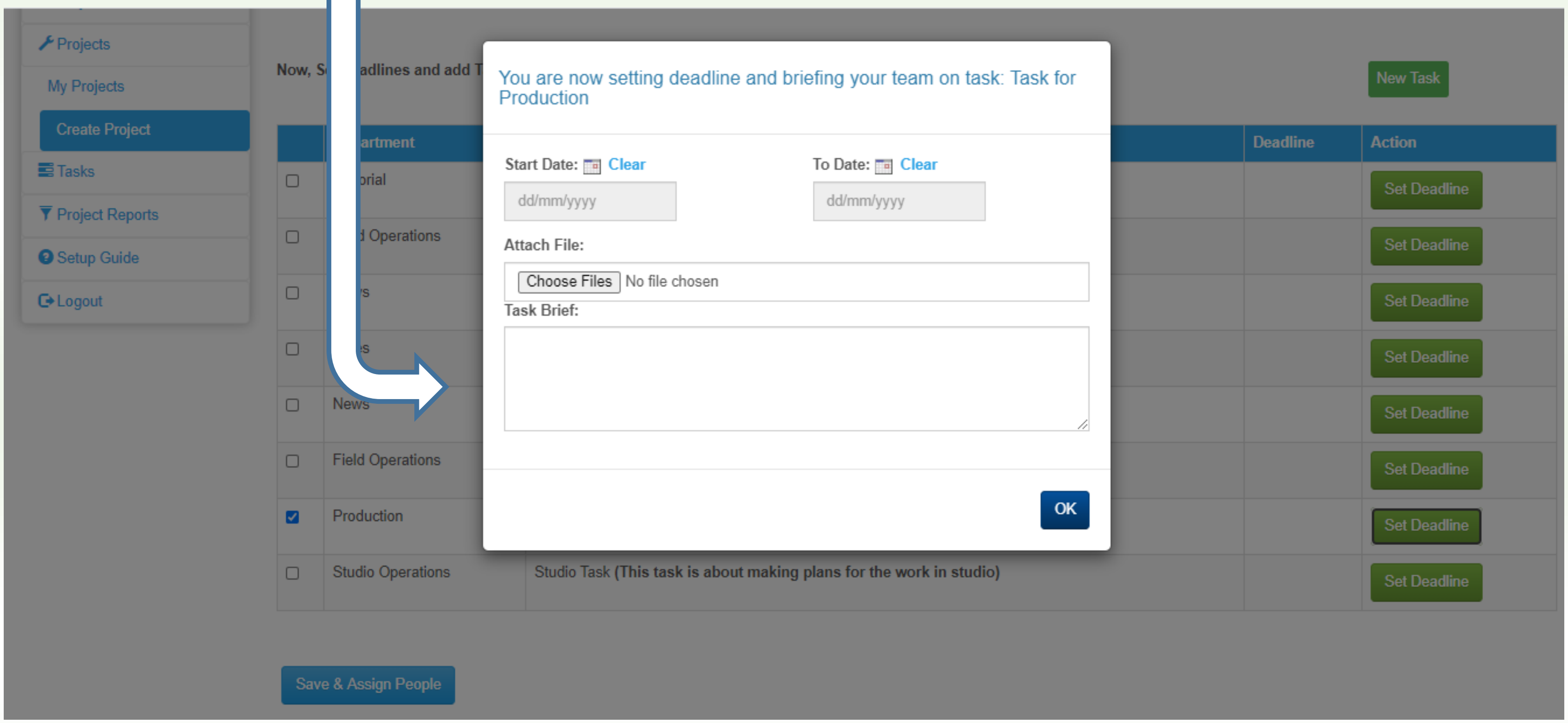
Add project name, Project budget, start date and end date, and select the project manager from the team member's list. Then, scroll down and click **Save & Add Tasks Button.**



3. Adding Tasks to a project

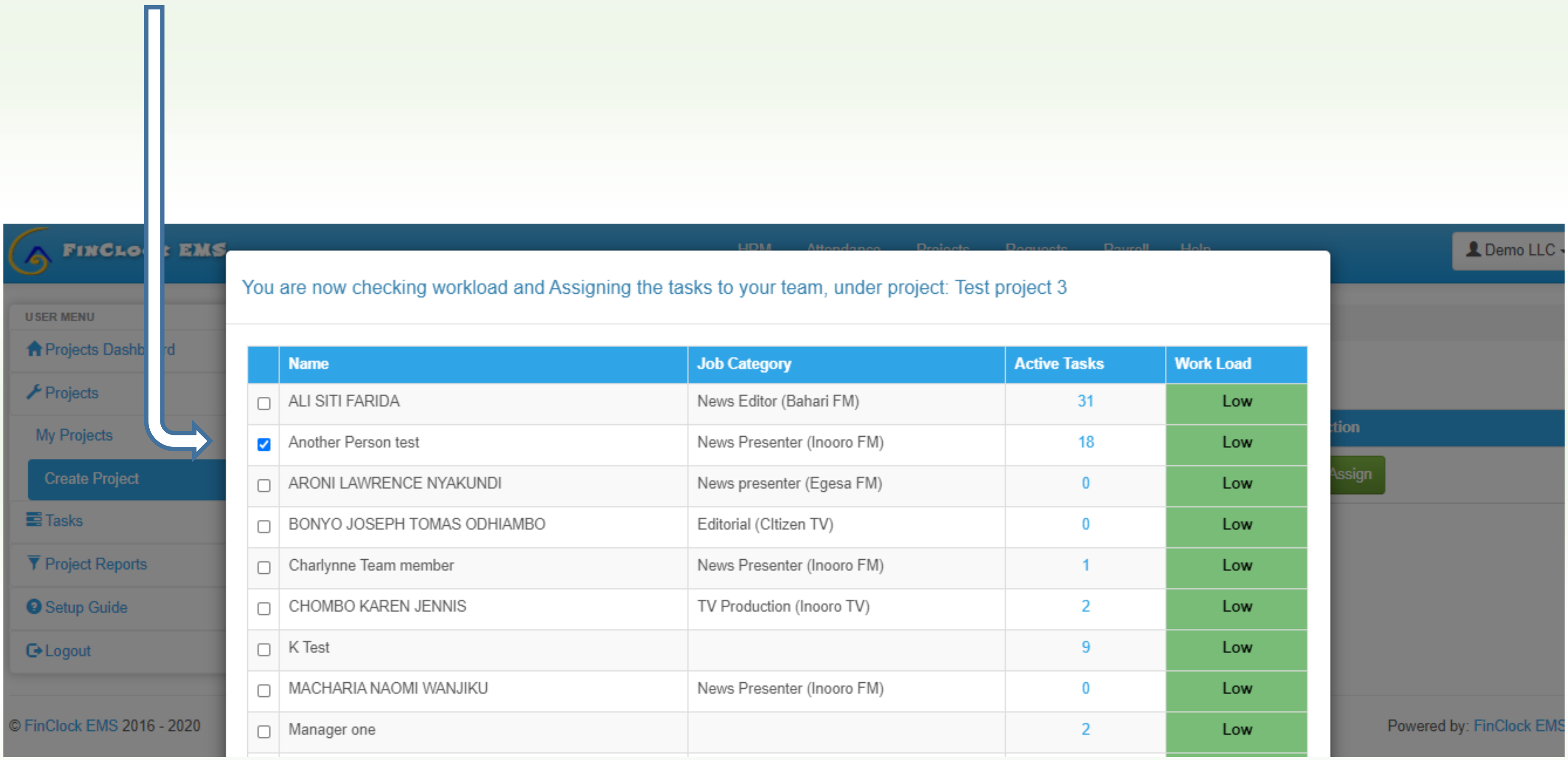
Step 2: Add Tasks to the project

- 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 to Team members

- 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.

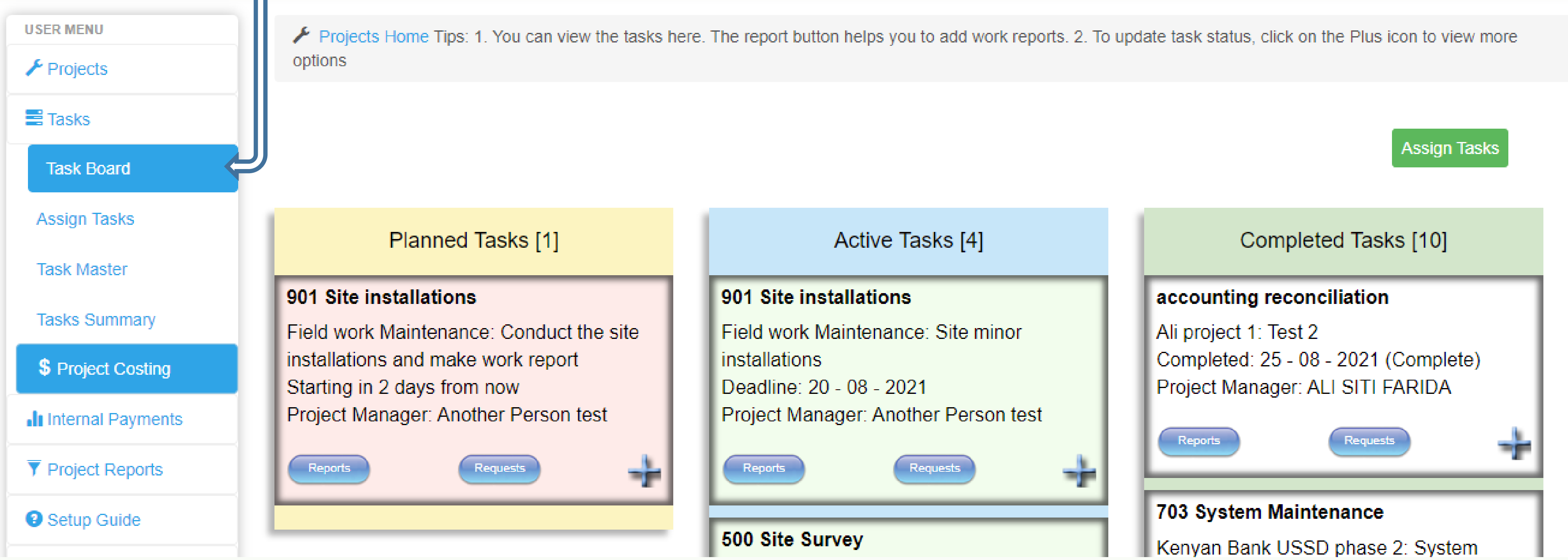


	Name	Job Category	Active Tasks	Work Load
☐	ALI SITI FARIDA	News Editor (Bahari FM)	31	Low
☑	Another Person test	News Presenter (Inooro FM)	18	Low
☐	ARONI LAWRENCE NYAKUNDI	News presenter (Egesa FM)	0	Low
☐	BONYO JOSEPH TOMAS ODHIAMBO	Editorial (Citizen TV)	0	Low
☐	Charlynne Team member	News Presenter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

4. Review Work Progress on the Task board

Step 4: Task board

- Now, you can see the tasks and status under the task board.
- The person assigned tasks get SMS short message to their phone and they can start working on the task.
- The team members can click on Report, to upload the work report per task.

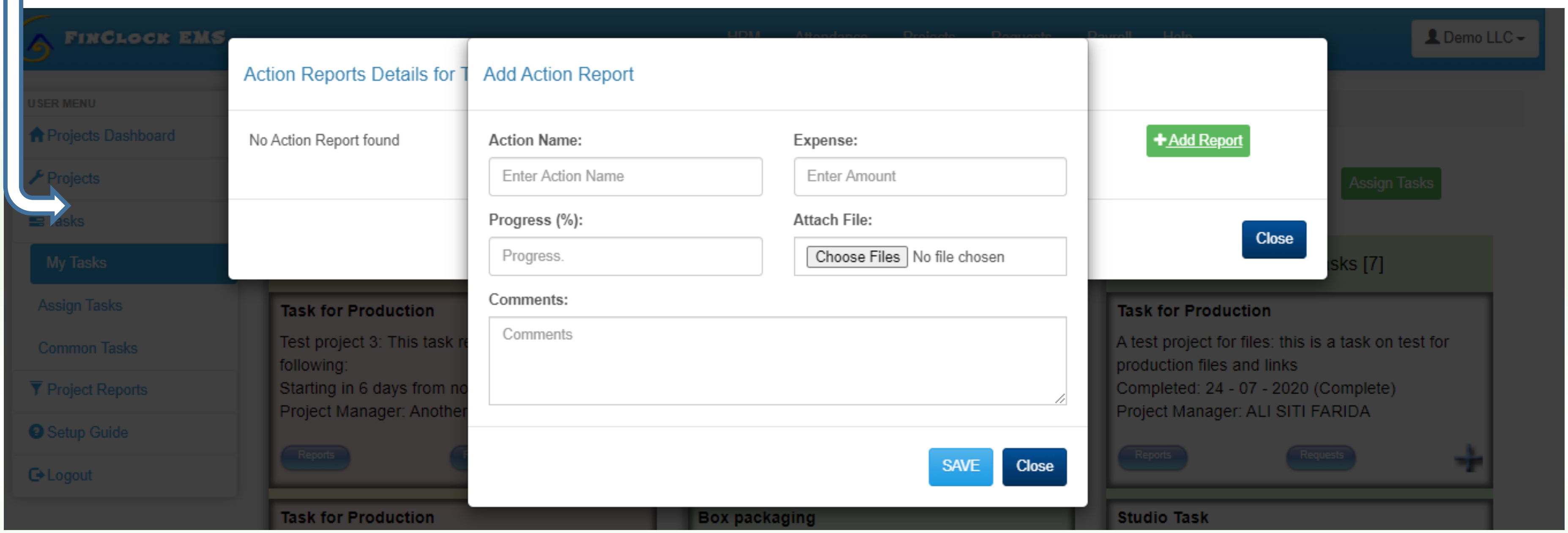


2. Work Reporting and Changing Task Status

1. Add work report (Task board)

Step 1: Adding Work Reports

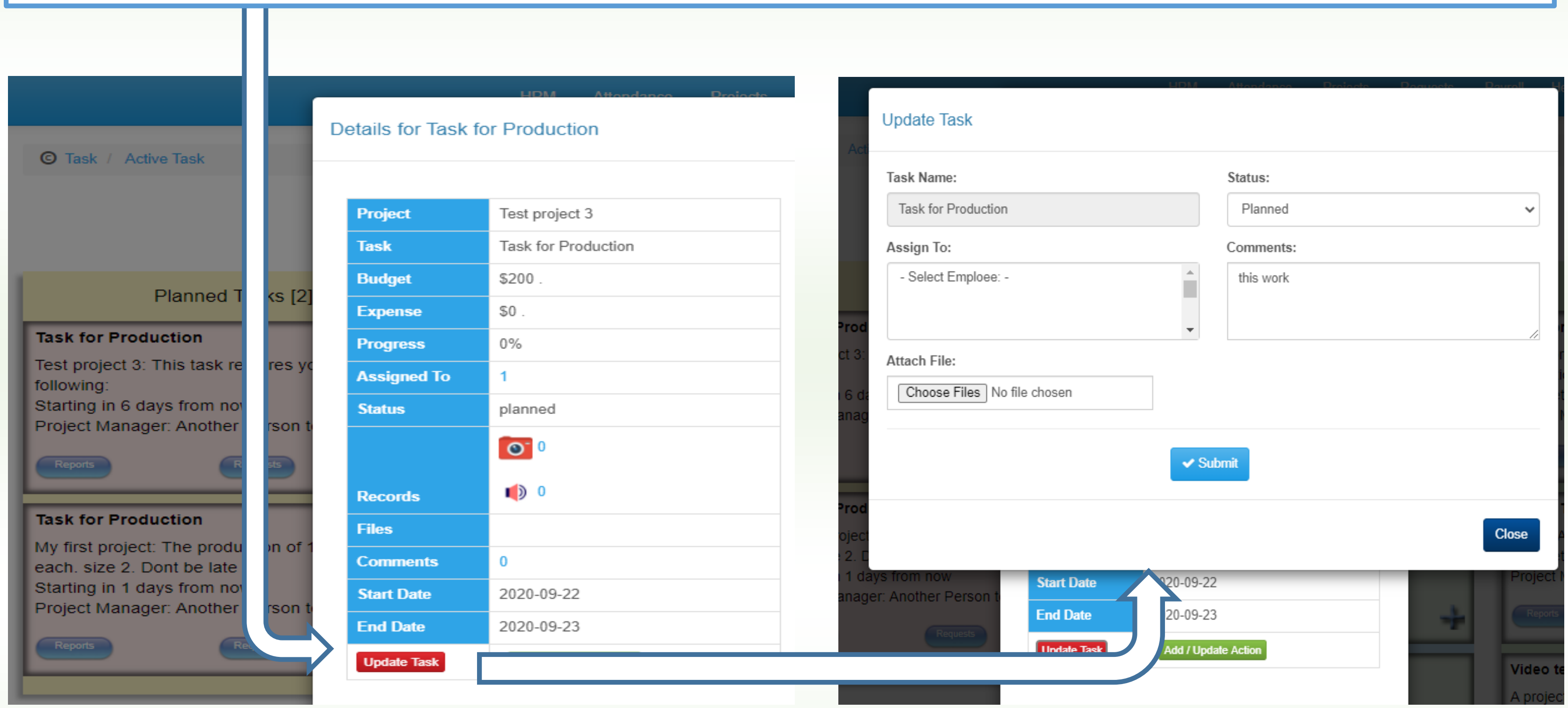
a. To add a task report, click on Reports button for the task you are working on and a popup will open.
b. Click on the "add report button" and now you can add a report about the work done.
   - The Action name is the title of the report and expenses is the amount you spent on that work.
   - Add percentage 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.



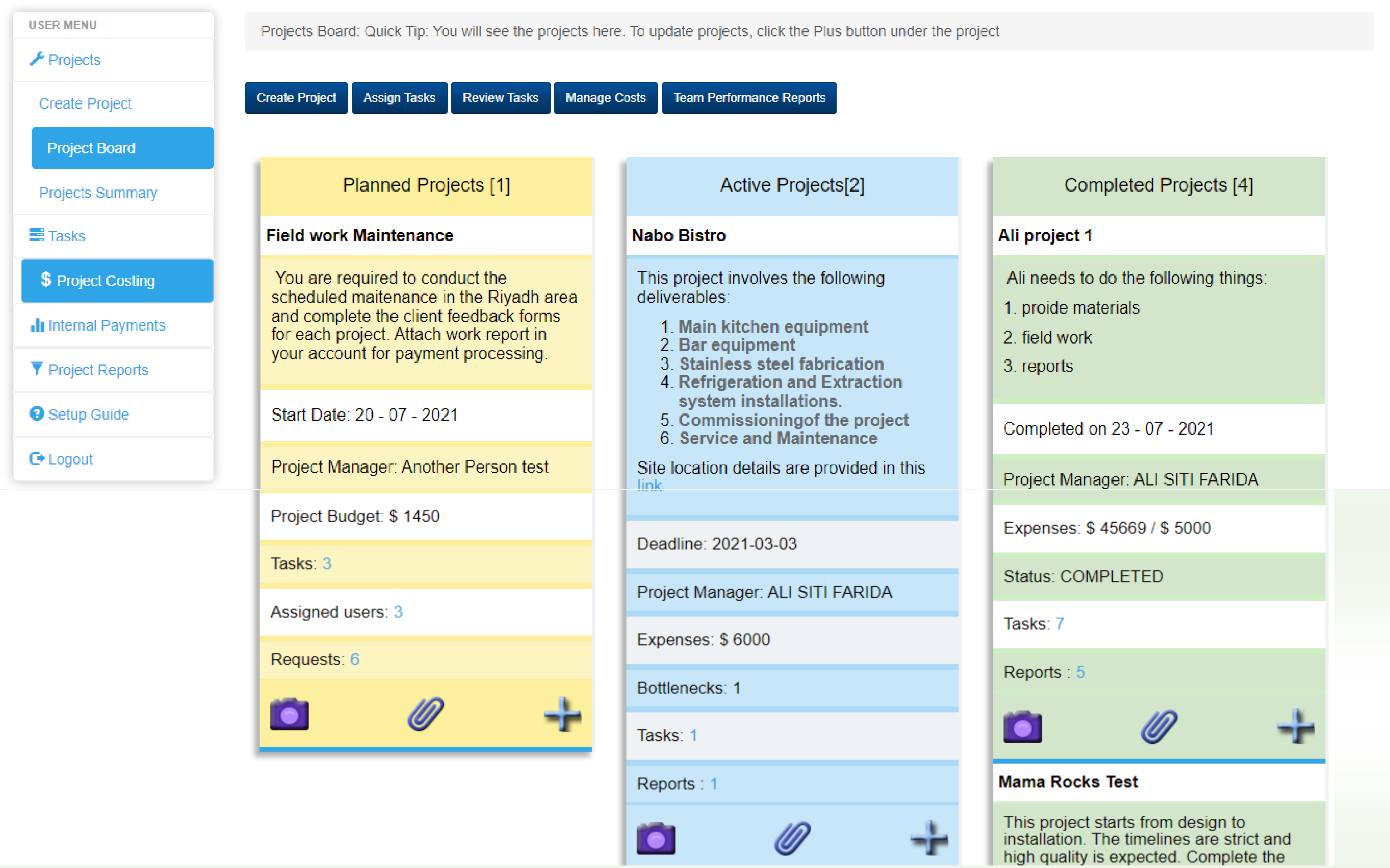
2. Change Task status

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.

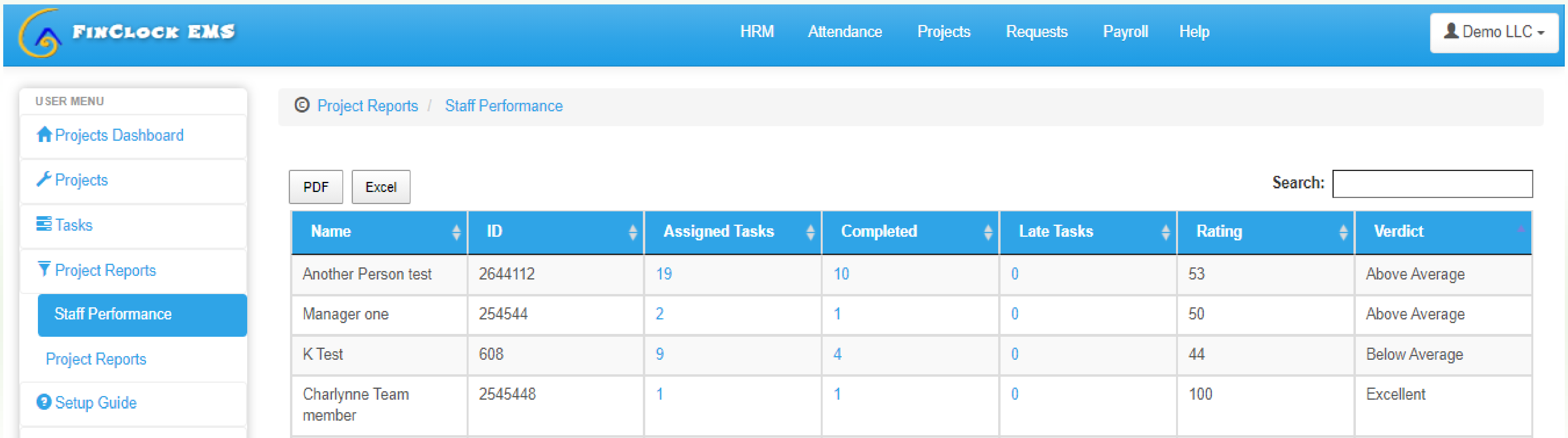


Project Board: Manage project progress: (Planned, Active and Completed)



- 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 a given task, under the project.
- Click on the 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, click the update button, and change the status from planned, to active or completed.

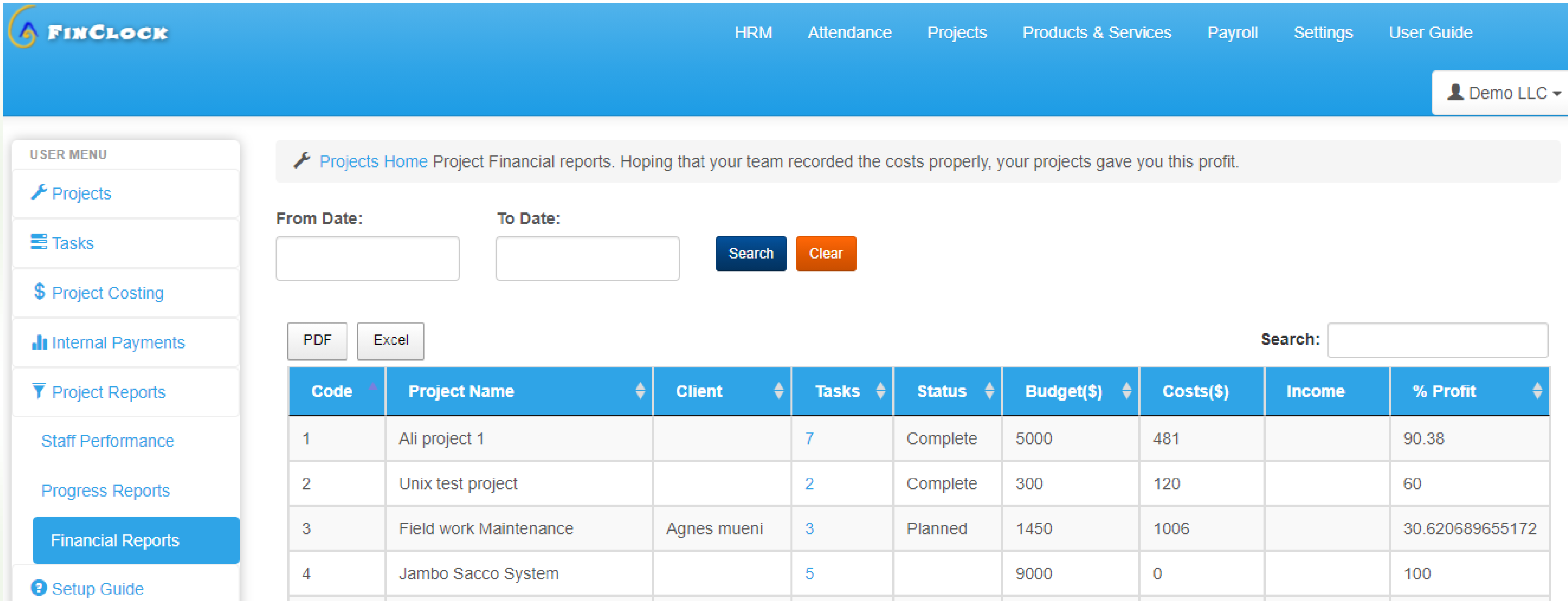
Staff Performance Report



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 the 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.
- These reports help you to make decisions on the work balance and commitment of your workers besides, you will be able to take actions on non-performing workers.

Project Revenue Reports (Profit/Loss)



- When you click on the project reports submenu, you will see a summary of the project financial reports
- The report is a summary of the Project Budget, Expenses/costs, income per project, and the percentage profit.
- Management uses these reports to evaluate the financial position of the business at a glance.
- Managers can also know the type of projects to focus on and increase profit in the business.

Need help?

Book a Meeting

Contact support team here: (Link)

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