FinClock Project Management Guide

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

FINCLOCK		HRM Attendance Projects Produ	cts & Services Payroll Settings User Guide				
			LC -				
USER MENU	Projects Board: Quick Tip: You will see the projects her	e. To update projects, click the Plus button under th	ie project				
Projects							
Create Project	Create Project Assign Tasks Review Tasks Manage	Costs Team Performance Reports					
Project Board							
Projects Summary	Planned Projects [1]	Active Projects[2]	Completed Projects [4]				
Tasks	Field work Maintenance	Nabo Bistro	Ali project 1				
\$ Project Costing	You are required to conduct the scheduled maitenance in the Riyadh area	This project involves the following deliverables:	Ali needs to do the following things:				
Internal Payments	and complete the client feedback forms for each project. Attach work report in	1. Main kitchen equipment 2. Bar equipment	 proide materials field work 				
T Project Reports	your account for payment processing.	3. Stainless steel fabrication 4. Refrigeration and Extraction	3. reports				



1. Creating Projects and Assigning tasks to team members

1		2. Add project						
Step 1: Create pr		Step 2: Add Project Details						
Start by clicking t menu and select project.		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		HRM Attendance Projects Products & Services Payroll Settings User Guide						
USER MENU	Projects Home Quick Tips: 1. Creat	te projects here and add tasks after saving. 2. Please note that you need have added the tasks on the task master first.						
Create Project	Project Name:	Budget Amount:						
Project Board	Enter Project Name	Enter budget amount						
Projects Summary	Start Date: 🔟 Clear	End Date: 📰 Clear Project Manager:						
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\$ Project Costing	Project Brief:							
Internal Payments	Image: Source Image:							
▼ Project Reports	Style Format	 Font ✓ Size ✓ Tar <li< td=""></li<>						

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

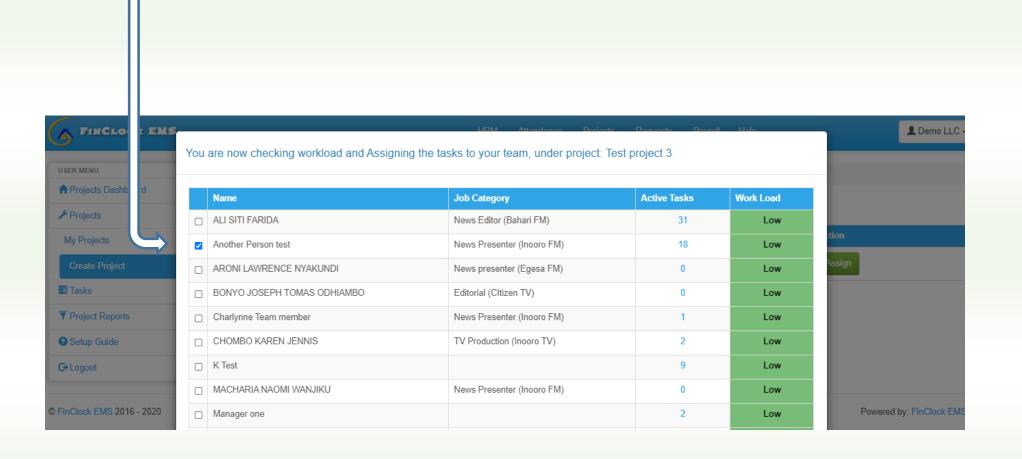
≁ Projects	_					
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Create Project		artment			Deadline	Action
Tasks		orial	Start Date: Clear	To Date: 🔤 Clear		Set Deadline
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O Setup Guide			Attach File: Choose Files No file chosen			Set Deadline
C+ Logout		ïS	Task Brief:			Set Deadline
		łS				Set Deadline
		lews		1		Set Deadline
	D F	ield Operations				Set Deadline
	P	roduction		ОК		Set Deadline
	□ S	tudio Operations	Studio Task (This task is abo	ut making plans for the work in studio)		Set Deadline
	Save 8	Assign People				

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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.

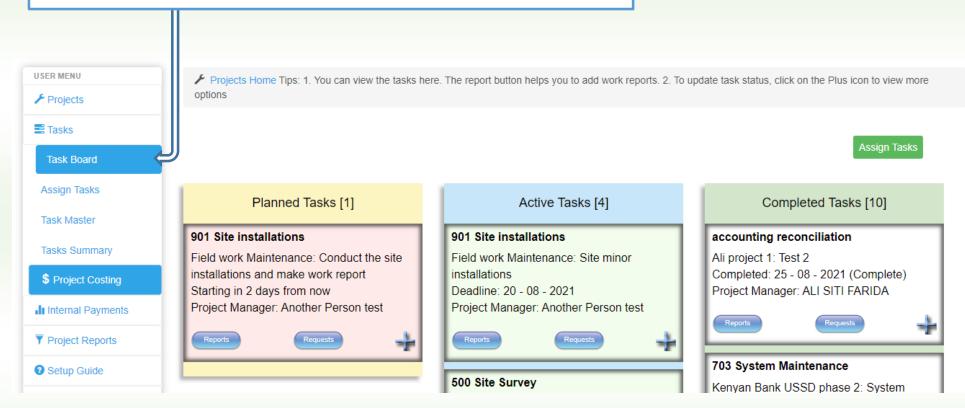




4. Review Work Progress on the Task board

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.



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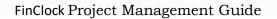
2. Work Reporting and Changing Task Status

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.

FINCLOCK EMS	Action Reports Details for T	Add Action Report	Attanidanen Diolaste Doministe	Dauroff Idah	L Demo LLC -
A Projects Dashboard	No Action Report found	Action Name:	Expense:	+ <u>Add Report</u>	
≁ Projects		Enter Action Name	Enter Amount		
E asks		Progress (%):	Attach File:	Close	
		Progress.	Choose Files No file chosen		sks [7]
	Task for Production	Comments:		Task for Production	
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▼ Project Reports	Starting in 6 days from no		1	Completed: 24 - 07 - 2020 (Co	
Setup Guide	Project Manager: Another			Project Manager: ALI SITI FAR	RIDA
C Logout	Reports		SAVE Close		
	Task for Production	Box pack	caging	Studio Task	



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.

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Update Task	Reports		Update Task			Lindate Task	Add / Up	late Action		Vide

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

USER MENU	Projects Board: Quick Tip: You will see the projects he	ere. To update projects, click the Plus button under the pro	oject			
Projects Create Project Design Desig	Create Project Assign Tasks Review Tasks Manag	e Costs Team Performance Reports				
Project Board Projects Summary	Planned Projects [1]	Active Projects[2]	Completed Projects [4]			
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 Project Costing Internal Payments Project Reports 	You are required to conduct the scheduled maitenance in the Riyadh area and complete the client feedback forms for each project. Attach work report in your account for payment processing.	This project involves the following deliverables: 1. Main kitchen equipment 2. Bar equipment 3. Stainless steel fabrication 4. Refrigeration and Extraction	Ali needs to do the following things: 1. proide materials 2. field work 3. reports			
Setup Guide	Start Date: 20 - 07 - 2021	system installations. 5. Commissioningof the project 6. Service and Maintenance	Completed on 23 - 07 - 2021			
C Logout	Project Manager: Another Person test	Site location details are provided in this link	Project Manager: ALI SITI FARIDA			
	Project Budget: \$ 1450	Deadline: 2021-03-03	Expenses: \$ 45669 / \$ 5000 Status: COMPLETED Tasks: 7			
	Tasks: 3					
	Assigned users: 3	Project Manager: ALI SITI FARIDA				
	Requests: 6	Expenses: \$ 6000	Reports : 5			
		Bottlenecks: 1				
		Tasks: 1				
		Reports : 1	Mama Rocks Test			
		i	This project starts from design to installation. The timelines are strict and high quality is expected. Complete the			

- 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

S FINCLOCK EMS			HRM	Attend	lance	Projects	Requests	Payroll	Help		L Demo L
USER MENU	Project Reports / St	aff Performance									
A Projects Dashboard											
≁ Projects	PDF Excel									Search:	
E Tasks	Name 🕴	ID \$	Assigned Tasks	\$	Complete	ed 🔶	Late Task	s (Rating	¢	Verdict
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Staff Performance	Manager one	254544	2	1			0		50		Above Average
Project Reports	K Test	608	9	4			0		44		Below Average
Setup Guide	Charlynne Team member	2545448	1	1			0		100		Excellent
AL .											

- 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.

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Project Revenue Reports (Profit/Loss)

FINCLOCK			HRM	Attendance	Projects	Products & Sen	vices Payroll	Settings	User Guide
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USER MENU	✤ Projects	Home Project Financial reports. Hop	ping that your team	recorded the c	costs properly. V	our projects dave	vou this profit.		
≁ Projects		······				pj 3	,		
E Tasks	From Date:	To Date:	Search	Clear					
\$ Project Costing				_					
Internal Payments	PDF	Excel					:	Search:	
▼ Project Reports	Code 🔺	Project Name 🔶	Client 🔶	Tasks 🔶	Status 🔶	Budget(\$) 🔶	Costs(\$)	Income	% Profit 🛛 🔶
Staff Performance	1	Ali project 1		7	Complete	5000	481		90.38
Progress Reports	2	Unix test project		2	Complete	300	120		60
Financial Reports	3	Field work Maintenance	Agnes mueni	3	Planned	1450	1006		30.620689655172
Setup Guide	4	Jambo Sacco System		5		9000	0		100
Social Galac									

> 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.



Book a Meeting

Contact support team here: (Link)

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