



# 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

The screenshot displays the FinClock Project Management interface. At the top is a blue navigation bar with the FinClock logo on the left and a menu of links (HRM, Attendance, Projects, Products & Services, Payroll, Settings, User Guide) on the right. A user profile dropdown for 'Demo LLC' is located in the top right corner. On the left side, there is a 'USER MENU' sidebar with options: Projects (selected), Create Project, Project Board, Projects Summary, Tasks, Project Costing, Internal Payments, and Project Reports. The main content area features a 'Projects Board' with a quick tip: 'You will see the projects here. To update projects, click the Plus button under the project'. Below this are five action buttons: Create Project, Assign Tasks, Review Tasks, Manage Costs, and Team Performance Reports. The board is divided into three columns: 'Planned Projects [1]' (yellow background) showing 'Field work Maintenance' with a description of scheduled maintenance in the Riyadh area; 'Active Projects[2]' (blue background) showing 'Nabo Bistro' with a list of deliverables: Main kitchen equipment, Bar equipment, Stainless steel fabrication, and Refrigeration and Extraction; and 'Completed Projects [4]' (green background) showing 'Ali project 1' with a list of tasks: provide materials, field work, and reports.



# 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**.

The screenshot displays the FinClock Project Management interface. The top navigation bar includes links for HRM, Attendance, Projects, Products & Services, Payroll, Settings, and User Guide. A user profile dropdown is visible on the right. The left sidebar shows the 'USER MENU' with options: Projects, Create Project (highlighted), Project Board, Projects Summary, Tasks, Project Costing, Internal Payments, and Project Reports. The main content area shows the 'Create Project' form with the following fields:

- Project Name:** Enter Project Name
- Budget Amount:** Enter budget amount
- Start Date:** dd/mm/yyyy (with a 'Clear' button)
- End Date:** dd/mm/yyyy (with a 'Clear' button)
- Project Manager:** - Select Project Manager - (dropdown menu)

Below the form is a 'Project Brief' section with a rich text editor toolbar. A blue arrow points from the 'Create Project' button in the sidebar to the form. Another blue arrow points from the 'Save & Add Tasks Button' (mentioned in the text) to the bottom right of the form area.

### 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**

The screenshot shows the FinClock Project Management interface. On the left, a sidebar contains navigation links: Projects, My Projects, Create Project, Tasks, Project Reports, Setup Guide, and Logout. The main area displays a list of tasks under the heading 'Now, Set deadlines and add tasks'. The tasks are listed in a table with columns for 'Task', 'Deadline', and 'Action'. The 'Production' task is selected, and a modal is open for setting its deadline and briefing the team.

**Task List:**

Task	Deadline	Action
Studio Operations		Set Deadline
Studio Task (This task is about making plans for the work in studio)		Set Deadline
Field Operations		Set Deadline
News		Set Deadline
Production		Set Deadline
Field Operations		Set Deadline
News		Set Deadline
Studio Operations		Set Deadline
Studio Task (This task is about making plans for the work in studio)		Set Deadline

**Modal: You are now setting deadline and briefing your team on task: Task for Production**

Start Date:  Clear To Date:  Clear

Attach File:  No file chosen

Task Brief:

OK

At the bottom of the task list, there is a button labeled 'Save & Assign People'.

### 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.



You are now checking workload and Assigning the tasks to your team, under project: Test project 3

	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

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## 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.

**USER MENU**

- Projects
- Tasks
- Task Board**
- Assign Tasks
- Task Master
- Tasks Summary
- Project Costing
- Internal Payments
- Project Reports
- Setup Guide

**Projects Home** Tips: 1. You can view the tasks here. The report button helps you to add work reports. 2. To update task status, click on the Plus icon to view more options

**Assign Tasks**

Planned Tasks [1]	Active Tasks [4]	Completed Tasks [10]
<p><b>901 Site installations</b></p> <p>Field work Maintenance: Conduct the site installations and make work report Starting in 2 days from now Project Manager: Another Person test</p> <p>Reports Requests +</p>	<p><b>901 Site installations</b></p> <p>Field work Maintenance: Site minor installations Deadline: 20 - 08 - 2021 Project Manager: Another Person test</p> <p>Reports Requests +</p>	<p><b>accounting reconciliation</b></p> <p>Ali project 1: Test 2 Completed: 25 - 08 - 2021 (Complete) Project Manager: ALI SITI FARIDA</p> <p>Reports Requests +</p>
	<p><b>500 Site Survey</b></p>	<p><b>703 System Maintenance</b></p> <p>Kenyan Bank USSD phase 2: System</p>



## 2. Work Reporting and Changing Task Status

### 1. Add work report (Task board)

#### Step 1: Adding Work Reports

- To add a task report, click on Reports button for the task you are working on and a popup will open.
- 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.
- When Finished, click the ‘Save’ button.

The screenshot displays the FinClock Project Management interface. On the left, a sidebar menu includes 'Projects Dashboard', 'Projects', 'Tasks', 'My Tasks', 'Assign Tasks', 'Common Tasks', 'Project Reports', 'Setup Guide', and 'Logout'. The main area shows a task titled 'Task for Production' with details: 'Test project 3: This task is for production files and links', 'Starting in 6 days from now', and 'Project Manager: ALI SITI FARIDA'. A modal window titled 'Add Action Report' is open, featuring the following fields: 'Action Name' (with placeholder 'Enter Action Name'), 'Expense' (with placeholder 'Enter Amount'), 'Progress (%)' (with placeholder 'Progress.'), and 'Attach File' (with a 'Choose Files' button and 'No file chosen' text). There is also a 'Comments' text area. At the bottom of the modal are 'SAVE' and 'Close' buttons. In the background, another modal titled 'Action Reports Details for Task' is visible, showing 'No Action Report found' and an '+ Add Report' button. The top right of the interface shows the user 'Demo LLC'.



## 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 displays the 'Details for Task for Production' modal and the 'Update Task' form. The modal shows task details for 'Test project 3' and 'Task for Production'. The 'Update Task' form allows changing the status from 'Planned' to 'Active' or 'Completed'.

Details for Task for Production	
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
<button>Update Task</button>	

**Update Task**

Task Name: Task for Production

Status: Planned

Assign To: - Select Employee: -

Comments: this work

Attach File: Choose Files No file chosen

Submit Close



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

USER MENU

[Projects](#)

Create Project

**Project Board**

[Projects Summary](#)

[Tasks](#)

**\$ Project Costing**

[Internal Payments](#)

[Project Reports](#)

[Setup Guide](#)

[Logout](#)

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

Create Project

Assign Tasks

Review Tasks

Manage Costs

Team Performance Reports

Planned Projects [1]

**Field work Maintenance**

You are required to conduct the scheduled maintenance in the Riyadh area and complete the client feedback forms for each project. Attach work report in your account for payment processing.

Start Date: 20 - 07 - 2021




Project Manager: Another Person test

Project Budget: \$ 1450

Tasks: 3

Assigned users: 3

Requests: 6



Active Projects[2]

**Nabo Bistro**

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 [link](#)

Deadline: 2021-03-03




Project Manager: ALI SITI FARIDA

Expenses: \$ 6000

Bottlenecks: 1

Tasks: 1

Reports : 1



Completed Projects [4]

**Ali project 1**

Ali needs to do the following things:

1. provide materials
2. field work
3. reports

Completed on 23 - 07 - 2021




Project Manager: ALI SITI FARIDA

Expenses: \$ 45669 / \$ 5000

Status: COMPLETED

Tasks: 7

Reports : 5



**Mama Rocks Test**

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

The screenshot displays the 'Staff Performance' report in the FinClock EMS system. The interface includes a sidebar menu on the left with options like 'Projects Dashboard', 'Projects', 'Tasks', 'Project Reports', 'Staff Performance' (selected), 'Project Reports', and 'Setup Guide'. The top navigation bar contains links for 'HRM', 'Attendance', 'Projects', 'Requests', 'Payroll', and 'Help', along with a user profile 'Demo LLC'. The main content area shows the 'Project Reports / Staff Performance' breadcrumb, a search bar, and a table with staff performance 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
Charlynnne 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)

**FINCLOCK**

HRMAttendanceProjectsProducts & ServicesPayrollSettingsUser Guide

Demo LLC

USER MENU

Projects

Tasks

Project Costing

Internal Payments

Project Reports

Staff Performance

Progress Reports

Financial Reports

Setup Guide

Projects Home

Project Financial reports. Hoping that your team recorded the costs properly, your projects gave you this profit.

From Date:To Date:

SearchClear

PDFExcel

Search:

Code	Project Name	Client	Tasks	Status	Budget(\$)	Costs(\$)	Income	% Profit
1	Ali project 1		7	Complete	5000	481		90.38
2	Unix test project		2	Complete	300	120		60
3	Field work Maintenance	Agnes mueni	3	Planned	1450	1006		30.620689655172
4	Jambo Sacco System		5		9000	0		100

- 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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