**Quick guide**

HOW IT WORKS

DevMan helps you to manage projects and all related financials. Each project is linked to an organization, and many projects can be linked to one organization. These links are recorded for future reference irrespective of whether the project was followed through or not.

Devman also provides work-flow to track the progress of your projects using a life-cycle or milestone.

Project

Payment ⟷ Organization
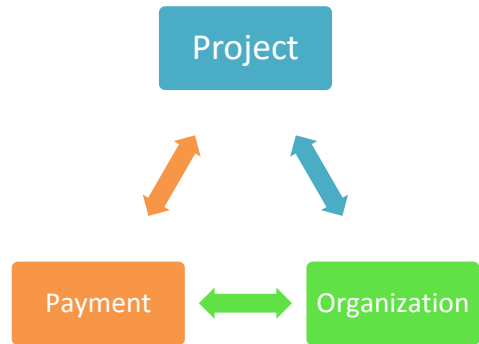
ADD A PROJECT

To add a project for a specific organisation:

Development
↓
Projects
↓
Add new project
↓
New project

Project name:	The name of the project
Parent name:	Using the inline search link the project to the organization running the project
Contact person:	This field will automatically fill with the primary link of the parent organization / business unit. You can change the project contact person if need be using the inline search function.
Flags:	Complete the profiling of your project by selecting all flags. These flags are important for accurate reporting.

Complete all details and save.

VIEW PROJECTS

To view all current projects select:

Development
↓
Projects
↓
View projects
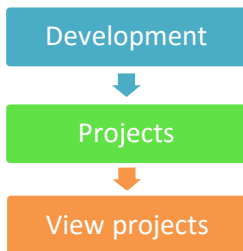
- Use the filters at the top of the grid to change your view
- Sort the data by column by clicking on the column heading to sort in ascending or descending order
- Click on any row to view the details

devman

To view all projects for a specific organization, when on the organization profile select:

View
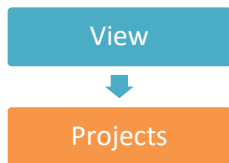
Projects   Sort and/or select your project as described above

To search for a specific project , use the inline search function on the home page or on the Development page.

MANAGE A PROJECT

There are 4 main things that need to be done when managing a project:
- Update the status
- Add documentation
- Add interactions (see separate quick guide)
- Send communication (see separate quick guide)

To update the status of the project go to the profile of the project and select:

Edit

Update status   Update status is on the right side of the page next to the project status.

The milestone change page will pop up on to the project page
Select the applicable status and date then select Save

To add an attachment to the project, select:

Edit

Add   Add is on the right side of the page next to the project attachments.

Complete all details and save.

|	
Date:	Applicable date
Type:	Type of attachment
Description:	Your description of the attachment
Attachment:	Browse your computer files to upload the file

To add an interaction – see Interactions Quick Guide
To send communication – see Communication Quick Guide

PROJECT QUICK CAPTURE PAGE

This page allows you to capture three profiles on one page:
- The organization profile
- The contact persons profile
- The project profile

To add a project using this method select:

Development

⬇

Projects

⬇

Add new project

⬇

Via quick capture page
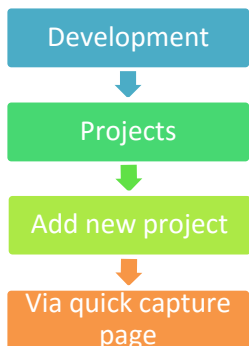
ORGANISATION DETAILS

Organisation: If the organisation profile already exists on DevMan, use the inline search to link the project to the organisation
If the organisation does not exist on DevMan then add the details in the relative fields

Contact person: If you select an existing organisation, the contact person field will provide a drop down of all the people linked to the organisation, simply select the applicable name
If the person does not exist on DevMan then add all the details in the relative fields

Complete all details and save.

NOTES