Quick guide
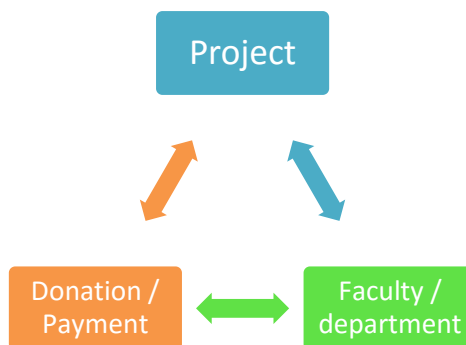
HOW IT WORKS

DevMan helps you to manage projects and all related financials. Each project is linked to a business unit, and many projects can be linked to one business unit. These links are recorded for future reference irrespective of whether the project was followed through or not. Categorising the projects by means of flags allows reports to be drawn from different views.

Project

Donation / Payment ↔ Faculty / department

BUSINESS UNIT HIERARCHY SET UP

DevMan allows you to set up all your business units for an organisation in an easy to see hierarchy using 4 levels. Your institution may call these Faculty >> College >> Division >> Department. For example:

Level 1 – Faculty/School	Level 2 - School	Level 3 - Department
Faculty of Health Sciences	School of Public Health and Family Medicine	Adolescent health Research Institute
Faculty of Health Sciences	School of Public Health and Family Medicine	Department of Public Health
Faculty of Health Sciences	N/A	Health Economics Unit
Faculty of Engineering	School of Radiation Medicine	Department of Radiation Oncology

Contact Kidz Africa for assistance to set up your hierarchy levels.
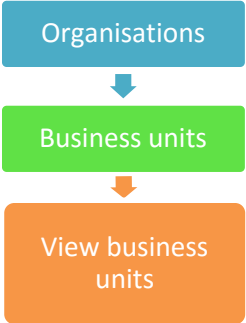
ADD A BUSINESS UNIT

To add business units select:

Organisations
↓
Business units
↓
Add new business unit

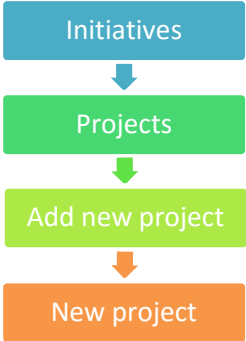|	
Name:	The name of the faculty/department etc
Type:	Select the level of the business Unit level 1, level 2, level 3 or level 4
Parent:	You must have a level 1 faculty / school as the parent if your type is a level 2 to 4

Complete all details and Save.

devman

VIEW BUSINESS UNIT HIERARCHY

To view the business unit hierarchy select:

```
Organisations
      ↓
Business units
      ↓
View business
   units
```

ADD A PROJECT

To add a project for a specific faculty / school / department select:

```
Initiatives
     ↓
  Projects
     ↓
Add new project
     ↓
 New project
```
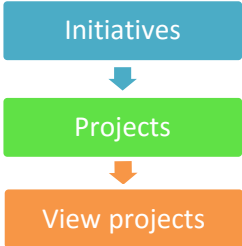
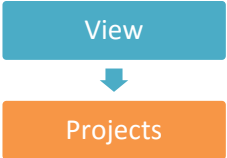|	
Project name:	The name of the project
Parent name:	Using the inline search link the project to the organization / business unit running the project
Contact person:	This field will automatically fill with the primary link of the parent organization / business unit. You can change the project contact person if need by 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:

```
Initiatives
     ↓
  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
- To view a specific project select a grid line to see all details

To 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.

EDITING A PROJECT

Search for your project profile. When on the profile select:

Edit

Edit the details and save your changes

NOTES