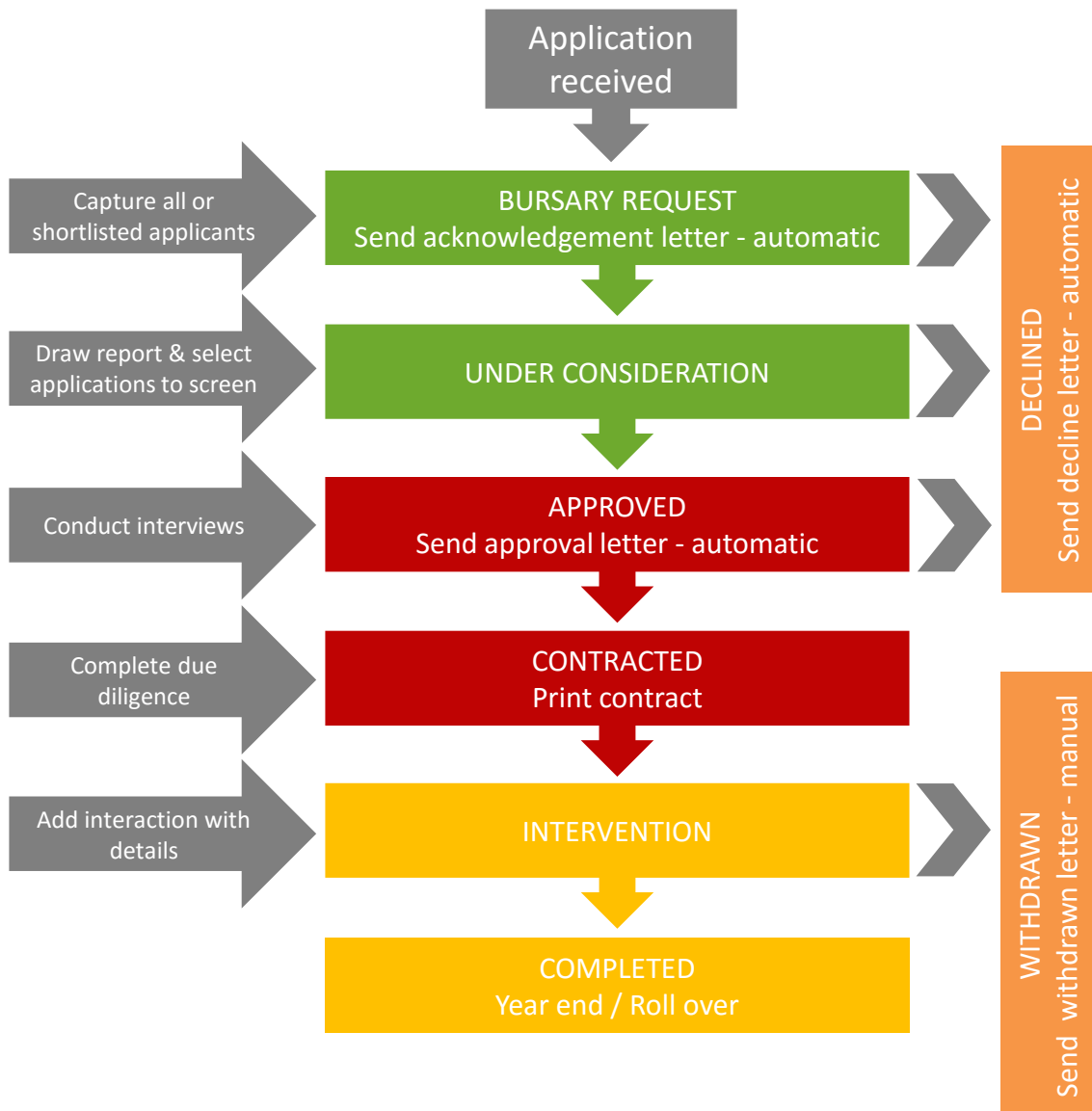## OVERVIEW

Bursary organisations typically deal with high volumes of applications which create a workflow management challenge. However, DevMan provides the needed tools to manage an effective process.

Successful computer systems are reliant on defined and documented workflow steps to which users must adhere. This guide is a basic outline of a bursary workflow process to help you to customise DevMan, and to assist in planning the initial rollout.

Workflow summary

DevMan can be used to manage the full application cycle for all or only your shortlisted / approved applicants – this depends on the number of applications, your internal capacity and / or approval process. Following is an example of a typical process:

	Workflow	
	Application received	
Capture all or shortlisted applicants	**BURSARY REQUEST** Send acknowledgement letter - automatic	DECLINED Send decline letter - automatic
Draw report & select applications to screen	**UNDER CONSIDERATION**	
Conduct interviews	**APPROVED** Send approval letter - automatic	
Complete due diligence	**CONTRACTED** Print contract	
Add interaction with details	**INTERVENTION**	WITHDRAWN Send withdrawn letter - manual
	COMPLETED Year end / Roll over	

devman

Key tools

MILESTONES
The primary process points in the application lifecycle which determine steps to be taken and trigger automated communications or reminders.

SAVED REPORT FILTERS
These provide quick access to reports and lists of projects at various milestones with just a few clicks. When the project milestone is updated these reports automatically update.

BULK PROJECT UPDATE FUNCTION
Allows you to select numerous projects and update them to the next milestone, triggering any linked workflow with just a few clicks.

Milestone - Receive applications

Add shortlisted applicant details	• Person profile
	• Academic profile
	     • School
	     • Tertiary
	• Bursary profile

Bursary status	Bursary request
Workflow	Send acknowledgement letter – automatic Auto update milestone to *Under consideration*

Milestone - Screen & approve

Bursary status	*Under Consideration*
Action: View list of possible beneficiaries	View saved *Under consideration* list – draw report
Action: Conduct interview and record interactions	
Workflow	Bulk update projects • *Decline* – send decline letter, automatic • *Approved* – Send approval letter, automatic
Action: Complete due diligence	Update bursary checklist Upload required documents

Milestone - Contract

Bursary status	*Approved*
Workflow	Update bursary status to *Contracted* • Add contracted amount • Print and finalise agreement, manual
Action: Rollover bursaries from previous year	Details on how to manage this process are under the heading 'Year end'
Action: Add payment commitments for the year	See quick guide

Beneficiary management

There are a number of tasks that can be managed on Devman:

- Results recording
    - manually (see quick guide)
    - or via online portal
- Recording student interactions (see quick guide)
- Payment request and approval cycle (see quick guide)
- Communications (see quick guide)
    - Automatic communications such as birthday messages, payment notifications, template driven letters, etc
    - Manual communications such as emails and SMS's,
- Keeping track of the beneficiaries status - Bursary organisations keep track of beneficiaries who is 'at risk', or require intervention, as well as a history when they have been 'at risk'. This can be managed with bursary milestones. For eg:

Contracted	At risk 1	First time at risk
	Off risk 1	No longer at risk
	At risk 2	Second time at risk
	Off risk 2	No longer at risk

Bursary status	*Contracted - At risk 1/2*
Workflow	Generate reminder to student manager to interact with beneficiary
Action: Capture interaction	Details of the intervention are recorded on an interaction, categorised as such (see quick guide)

Milestone - Year end

A number of steps need to be taken at the end of the year to indicate:
- who has completed their studies
- who has dropped out / been removed from the programme, and
- who will continue studying

HOW TO DO IT

1. Update the exceptions manually (usually those who have completed their studies or dropped out)
2. Update remaining bursaries using bulk updater
3. Bulk roll over all bursaries to the next year

Action: Update qualification status	Indicate if qualification is • Completed • Incomplete • In service training
Workflow	Manually update bursary exceptions • *Completed – Completed studies* • *Withdrawn* – send terminated letter, automatic Bulk update balance of bursaries • *Completed - Rollover*

Workflow	View saved *Completed – Rollover* list
	Bulk rollover bursaries
	• Bursary record for the next year will be generated
	• Bursary status will be – *Bursary request*
	Bulk update rolled over bursaries
	• *Approved*
	Continue with workflow

Qualifications & results

Results for each semester can be added for a qualification. DevMan automatically calculates the semester average based on the number of subjects added, even if the result is '0'.

However, each result can be flagged, and a flag can be set to exclude the result from the average. For eg:

Cancelled	the outcome is '0' and shouldn't affect the average
Fail	the outcome is '0' but should affect the average
Fail – did not write	the outcome is '0' but should affect the average
Pass	the outcome should affect the average
Pass - distinction	the outcome should affect the average
Progress result	the outcome shouldn't affect the average

These flags are customisable.

Reports

The following reports can be drawn:

BURSARY
- By bursary milestone- Approved; At risk; Withdrawn, etc
- By bursary flags – Region, Accommodation, Sponsor etc

QUALIFICATION
- Qualification status – In progress, Completed; In-service training, Incomplete
- Semester Pass, Fail
- Subject results and Pass, Fail

FINANCIAL
- Approved vs paid amount
- Payments by beneficiary
- Payments by sponsor
- Payments by expense category

INTERACTIONS
- By date
- By type
- By student
- By user

Many other reporting options are also available depending on what is required.