Workflow

HOW IT WORKS

DevMan workflow helps you:

- Record workflow steps such as project milestones.
- Control workflow with a pre-defined path ensuring practitioners perform certain tasks at specific intervals.
- Assign tasks and reminders to practitioners and administrators.
- Generate progress report reminders within DevMan for timely reporting

Each task is linked to a specific milestone, when the project milestone is updated, a reminder for a specific task to a specific person is generated. Milestones are available on projects, requisitions, remittances, tax certificates and approaches.

WORKFLOW RULE SET UP

DevMan workflow is very customisable and can assist with the following types of activities:

- Generate auto communications, such as acknowledgement of receipt letters
- Generate letters to be printed or emailed
- Generate reminders to complete specific tasks
- Assign tasks to other team members

The rules for these types of activities are linked to specific milestones and are generated by updating the milestone of a project.

Contact Kidz Africa for assistance to set up your customised workflow

UPDATING WORKFLOW MILESTONES

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 update page will pop up on to the project page
Select the applicable status and date then select Save
This will generate the task/reminder/letter based on your workflow rules

- Auto communications are generally email based – these will automatically send when the project milestone is updated

- Letters to be printed/emailed as well as reminders for tasks will show under the Actions due menu on the project. To complete the task, on the project select:

Action due

↓

Print decline

Quick guide

On the activity page select:

Complete

- If the reminder is for a letter, this will mail merge the letter with the details of the project. Print / email the letter as per the communication quick guide
- If it is simply a reminder, this will mark it as completed

- To assign tasks to other team members select their name in the *Assigned to* field on the milestone update page. This will only work if the workflow rule is set up to assign the task to the person on the milestone.

VIEW REMINDERS

There are 3 ways to view generated reminders:

- From the project under the Tasks due menu
- From the home page under the 'my inbox' section
- From the communication menu

From the communication menu select:

Communication

↓

Activities due

↓

View

Use the By filter to select your activities.

Date	Description	With	By
13 Mar 2014	Print decline letter	Smith, John (Mr) – Charity Organisation	Dlamini, Bulelani – CSI fund
10 Mar 2014	Request progress report	Tsekedi, Anna (Ms) – ABC Environmental studies	Dlamini, Bulelani – CSI fund
09 Mar 2014	Print approval letter	Kunene, Thulani (Mr) – Child Welfare	Dlamini, Bulelani – CSI fund

Date: The date the reminder is due on
Description: Brief description of what must be done
With: With whom the activity must be completed / communicated with
By: Who is responsible for completing the activity

The activity grid click through is cell specific:

- If you select the date or the description it will take you to the reminder
- If you select the With column, it will take you to the projects organisation profile
- If you select the By column, it will take you to the organisation profile of the person responsible for the activity