

## Bursary rollout

Keeping bursary processes simple can be challenging. DevMan offers a convenient centralised system, which ensures all your requirements for bursary management are met.

This guide follows a tried and tested phased approach, and is designed to set up your system quickly with minimal disruption and impact on productivity.

### Step 1 – System setup and imports

Enhance the system value by acquiring any available information such as existing beneficiaries and their qualification histories. Steps include:

- DevMan team provides import specification document
- Client sources data, possibly including:
  - Beneficiaries, alumni, suppliers, and other stakeholder lists
  - Beneficiary qualification & bursary history
- DevMan team imports data
- DevMan team assists the client with setup of core beneficiary profile settings (DOB, ID numbers, student numbers, cohort, demographics etc.)



### Step 2 – Bursary workflow

A collaborative workshop is required to determine key bursary milestones throughout the year, from approval to completed, or withdrawn.

- Identify and set up bursary milestones and year end processes
- Add related workflow (communications / reminders / tasks)
- DevMan team to handover and train key users
- Key users to implement and oversee rollout of new processes / workflows



### Step 3 – Bursary management basic training

A series of introductory training sessions useful for all users covering the following areas:

- Search, view and update beneficiary and other stakeholder profiles
  - Including Interactions, communications, milestones and documents
- View qualifications and record results
- Search for groups of beneficiaries (per year, institution, qualification, bursary manager etc.)



## Step 4 – Online results portal

DevMan provides an online portal for collecting beneficiary results. Roll out steps include:

- DevMan team to set up online results page branded for your organisation
- Training session with key users to send bulk email request and monitor submissions
- DevMan support to assist user to monitor results submission



## Step 5 – Financial management

All bursary related financial steps can be streamlined via DevMan. Each step may require approval and workflow process definition - the complexity of this is optional and subject to your needs and preferences. Once these have been defined and set up, implementation and training can take place. Areas to consider:

### Commitments and pledges

Initial set up and training for relevant staff includes:

- High level Bursary budget set up and management
- Identify key finance fields to track, e.g. expense category - Tuition; Books; Meals etc.
- Training will cover:
  - Commitments (repeat payments)
  - Pledges and payments
  - Bursary finance summary



### Payment requisitions and remittances

Payment requests are typically approved by a manager and processed by finance by means of requisitions. Payment remittances are then generated to notify the relevant parties. Rollout steps include:

- Identify and set up the request and approval process.
- Add related workflow (communications / reminders / tasks)
- Client to source and provide payee information with banking details.
- DevMan team to import data.
- Training will cover:
  - Generating requisitions and approval process.
  - Issue remittance advice and complete the payment cycle.

## Step 6 – Advanced training - reporting

Analyse all areas of the database. Training will cover:

- Search and find function
- Customised and published reports
- Dashboards



## Step 7 – Application cycle / Online application

DevMan can be used to manage the full application cycle from start to approval, or only your shortlisted/approved candidates. This depends on the number of applications, your internal capacity and/or approval process. Of course, an online application can iron out many of these challenges.

- Client and DevMan team to workshop the requirements
- Set up and training will be provided as needed, OR
- DevMan team to develop the online application.



## Step 8 – Communications & events

DevMan provides a complete set of tools for managing subscriptions, bulk mailing and events. Areas for training could include:

- Day to day communications
- Subscriptions and mailing lists
- Mailshots
- Events



## Step 9 – Financial integration

DevMan is an integrated and connected solution that 'talks' to many core administrative systems, this includes finance and communication as well as a growing suite of online services. Potential areas for integration include:

### EFT integration

DevMan integrates directly to Virtual Card Services (VCS) which acts as a portal transferring data between DevMan and the bank. Process multiple bursary payments directly from DevMan.

### Pastel integration

Reduce data capture pressures and create a single source of truth by streamlining data transfers between DevMan and your accounting software. DevMan integrates directly to Sage Pastel, and supports API's to various other financial solutions.



## Step 10 – Alumni programme

Maintain contact with your alumni once they've completed their studies using DevMan's suite of communication tools. Build a history of communication and make your team's work easier and enhance their productivity. Steps include:

- Update beneficiary status to Alumni
- Manage alumni communication

