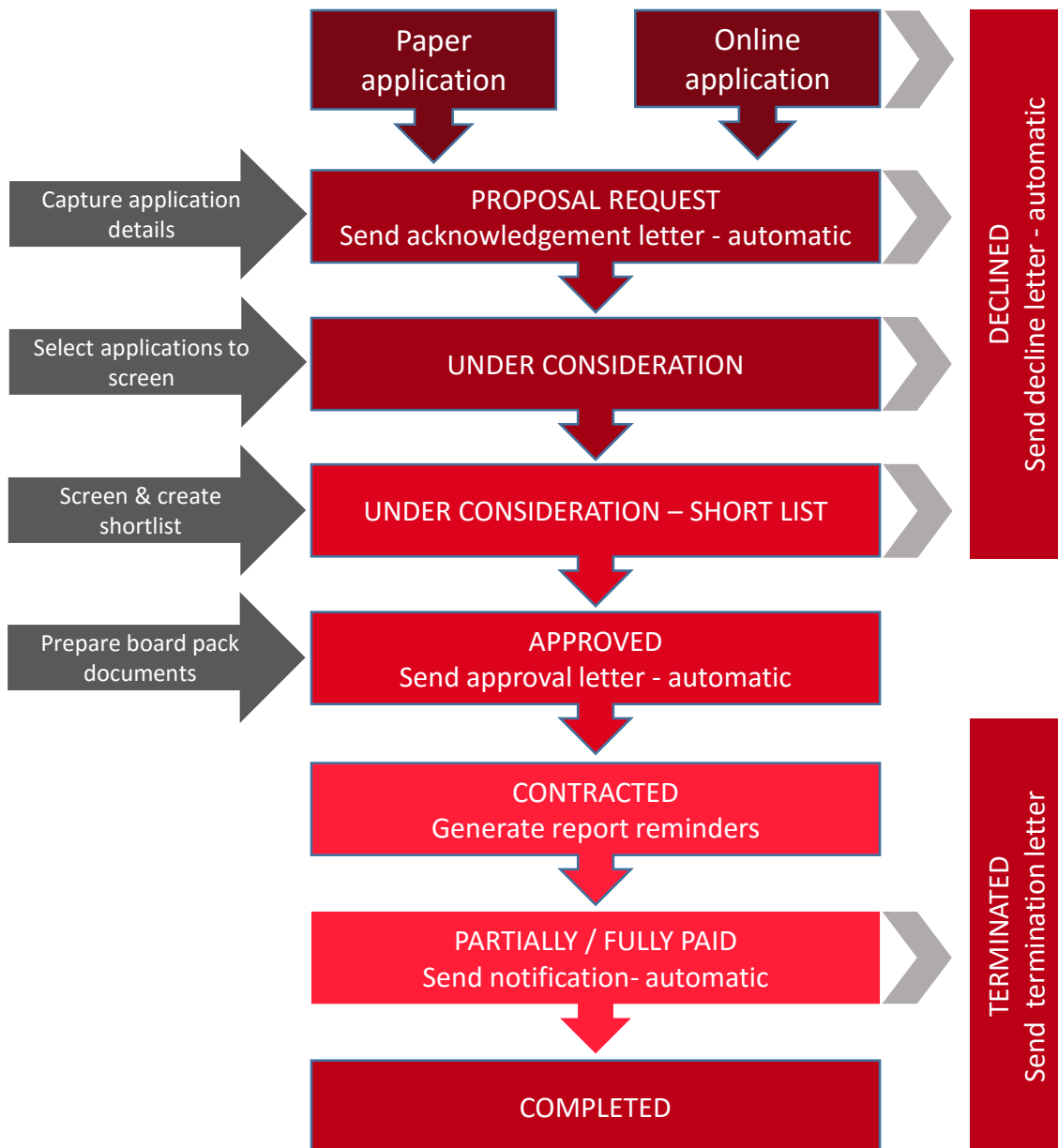


Grant making organisations typically deal with high volumes of funding applications, which create a workflow management challenge. However, DevMan provides the needed tools to manage an effective process.

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

Workflow summary



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.

Workflow steps

Following is an outline of a typical grant management cycle as managed on DevMan:

Receive applications

PAPER APPLICATIONS	Add applicant details <ul style="list-style-type: none"> • Organisation profile • Contact person profile • Project profile • Factsheets • Upload attachments • Update checklist
Project status	Proposal request
Workflow	Send acknowledgement letter - automatic
Action: Select applications to screen	View saved <i>Proposal request</i> list Bulk update projects <ul style="list-style-type: none"> • <i>Decline</i> – send decline letter, automatic • <i>Under Consideration</i> By completing this step you are separating projects to be screened from any new applications.
ONLINE APPLICATIONS	All details are automatically screened and added to DevMan
Project status	<i>Proposal request</i> – online application complete
Workflow	Send acknowledgement letter - automatic
Action: Select applications to screen	View saved <i>Proposal request – online application complete</i> list Bulk update projects <ul style="list-style-type: none"> • <i>Under Consideration</i> By completing this step you are separating projects to be screened from any new applications.

Screen applications

Project status	<i>Under consideration</i>
Workflow	Screen applications - View saved <i>Under consideration</i> list Extract data to excel
Action: Select applications for shortlist	View saved <i>Under consideration</i> list Bulk update projects <ul style="list-style-type: none"> • <i>Decline</i> – send decline letter, automatic • <i>Under Consideration - Shortlist</i> By completing this step you are separating projects that have been screened from those that still need to be screened.
Project status	<i>Under consideration - Shortlist</i>
Workflow	Draw report of shortlisted applications View saved <i>Under consideration – Shortlist</i> Extract data and prepare for meeting
Action: Update applications post meeting	View saved <i>Under Consideration – Shortlist</i> list Bulk update projects <ul style="list-style-type: none"> • <i>Decline</i> – send decline letter, automatic • Manually update projects • <i>Approved</i> - send approval letter, automatic /manual • <i>Approved amount</i>

Approve & manage

Project status	Approved
Workflow	Prepare grant contracts - View approved projects Manually update <ul style="list-style-type: none"> • <i>Contracted</i> – send grant contract, manual
Workflow	Add payment record as transactions are processed <ul style="list-style-type: none"> • Send payment notification, automatic Project will auto update milestone to <i>Partially</i> or <i>Fully funded</i>
Workflow	Terminate project if non-compliance Manually update project <ul style="list-style-type: none"> • <i>Terminated</i> - send terminated letter, manual
Workflow	Manually update completed projects <ul style="list-style-type: none"> • <i>Completed</i>

Financial workflow

DevMan provides a full financial approval process from tranches, to requisitions and payment remittance. .