12 February 2023

Zephyr Project Manager – supply-chain processes

1 How do I log on to Zephyr?

Enter https://ravenshill.co.za/projects in a browser such as Google Chrome, Opera or Microsoft Edge.

Store this URL on the browser to make it even easier to log on next time.

When the login form opens, enter your username and password. This will be the same as that which you entered when you signed up to the website.

2 What are the parameters for a Project?

Each Project is linked to one of ten Categories which covers all the activities that the Trustees are responsible for.

Only in respect of the Categories

- 'Maintenance – Common Property' and
- 'Maintenance – Units'

shall we have multiple Projects for ease of reference. All other Categories shall only have one Project.

All Projects are numbered sequentially. To create a new Project you must first ascertain the last number used.

To do this click on Projects on the side menu bar; then click on the All Projects segment and the screen that opens will show on the left uppermost segment the last Project number used. You will use the next number in ascending order.

The project manager shall be the responsible Trustee.

3 How do I create a new Project?

To create a new Project, click on the '+' button bottom right of the screen. Click 'New Project' and enter the details.

To inspect the details captured, click on Projects on the side menu bar; then click on the All Projects segment and the screen that opens will display all Projects created.

Click on the Project name in the segment.

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4 What are the parameters for a Task?

All Tasks created within a Project follow a set sequence. Each Task shows the Project number as a prefix and the Task number as a suffix.

Every Task has a start date when commenced and an end date.

Each of the Trustees and the estate manager linked to the Project receives an email each time a Task is updated.

The start date of every Task shall not be earlier that the start date of the Project. The end dates for each Task shall allow for a reasonable period to complete the Task.

The end Date of the last task shall not be later than the end date of the Project.

Please note that the details you enter cannot be edited/corrected/deleted except by the Administrator.

4.1 Outline or Specification (suffix '-1')

The Trustee under whose portfolio the Project falls is responsible for providing an outline of the issue and a specification of what is required to fix the matter. He also provides a cost estimate.

4.2 Quote(s) (suffix '-2)

It is the responsibility of the estate manager to secure the necessary quote(s) for the Project. The specification per 4.1 is provided to each supplier approached for a quote and each of them either repeat the specification on their quote or confirms thereon that the quote meets the specification provided.

Should the cost estimate per 4.1 be less than R5k, only one quote is required. Cost estimates above R5k require three quotes.

The estate manager is responsible to record all interactions with possible service providers, checking that the quotes as received comply with our requirements and uploading the quotes. No more verbally reporting to the Trustees at a meeting. All the required details are available on the Tasks of every Project for them to read.

The Trustees are not involved, except that the portfolio Trustee can recommend a service provider to be approached.

4.3 Approvals (suffix '-3')

The comments, notes and approval of a particular quote are recorded on the Task by the Trustees. The estate manager records a note to confirm that all Trustees have indicated their approval of a Quote and the Task is complete.

4.4 Implementation (suffix '-4)

Based on the results from 4.3 the estate manager is authorised to proceed to award the works contract to the service provider selected by the Trustees.

5 How do I create a Task?

First, ascertain the Project name and number.

Then click on the '+' button bottom right of the screen. Click 'New Task' and enter the details.

Please note that the form does not display all the fields the first time around. You have to again open it to complete all the remaining fields.

To do this click on Tasks, select All Tasks, Alphabetical and All Projects. Go to the bottom of the list to find your newly created task. Click it to open and complete the missing fields.

- Description – insert the same details as shown on the Project;
- Dates – ensure the Start and End Date align with the Project's dates;
- Assignee – the name of the portfolio Trustee;
- Project – select the Project from the drop-down list;
- Categories – select the Category from the drop-down list;

When done click 'Save Changes'.

6 How do I find the Tasks I'm responsible for?

This is the core of our respective responsibilities.

Click on Tasks on the side menu bar, and select My Tasks. Due date Ascending and All Projects.

The screen displays all your Tasks. Always work on the Tasks from top to bottom.

Overdue Tasks are shown with a on the extreme right. This is a no-no. Expect the Administrator (Ben) to be on your case the same day.

Click on the Task and use the 'Discussion' menu at the top to record your comments.

When you have completed a Task - such as 'Approvals' and have made your selection and recorded it as part of your Discussion - you can close the Task.

To close a Task click on the 'Complete' icon top left of the Task screen. Remember, closing a Task means you cannot see it anymore as an outstanding Task, but others still can if they have to attend to it.

7 How do I enter comments or attach a file to a Task?

Click on Tasks on the side menu bar, and select My Tasks. Due date Ascending and All Projects.

Click on the Task and use the 'Discussion' menu at the top to record your comments. You simply start to type your comment in the space provided. The system will date stamp when you entered it and add your name to it.

To upload a file follow the instructions in the user guide.

8 Who closes a Project?

The Administrator (Ben) will view all open Tasks daily and when all Tasks are closed, the Project will also be closed.

Closing a Task or Project does not delete it. We can always get back to any of these.

9 Who can I ask if I get stuck?

Send an email or WhatsApp to the Administrator.