Student Information System (SIS) on Microsoft Dynamics CRM platform

Typical problems:

* Lack of processes description
* Difficulties working with Data
* No integration between IS

Lack of processes description

- Inefficient use of the University resources (human, material and financial)
- Absence of the described scenarios on the work with Clients
- Lack of knowledge base on the work with Clients
- Dependence on Staff

Difficulties working with Data

- Scattered Data sources
- Long time for Data retrieval
- The problem of Data Integrity
- Difficulties with Business Intelligence

No integration between IS

- Lack of unified working environment for all users of the Systems
- Lack of integration between the University Information Systems (IS) and the IT infrastructure
- System management issues and data security at the user level

Student Information System (SIS)

What is SIS?

Microsoft Dynamics CRM
2011 – existing solution
2015 – under development

Localisation
English and another 39 languages

Data Import / Export
on the user level

Process Driven
Business Process*,
Flows*,
Dialogs,
Workflows,
Business Rules*

Excel
full integration

Word
full integration
(Bitforit module)

Outlook
full integration
(with Exchange Server)

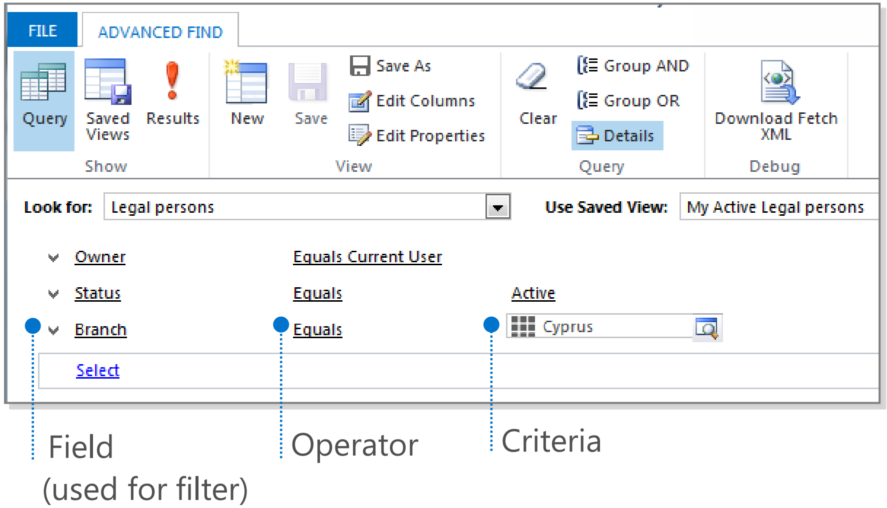
Microsoft BI
Excel
Power Pivot
Power View
Reporting Services
Data Mining

*Microsoft Dynamics CRM 2015

bitforit

Search option at the System. Fast Reports

- Fast and Advanced Search
- Advanced Search - parameters of choice
- Individual filters for users and save option
- Upload data to Excel file (in the table or pivot table)

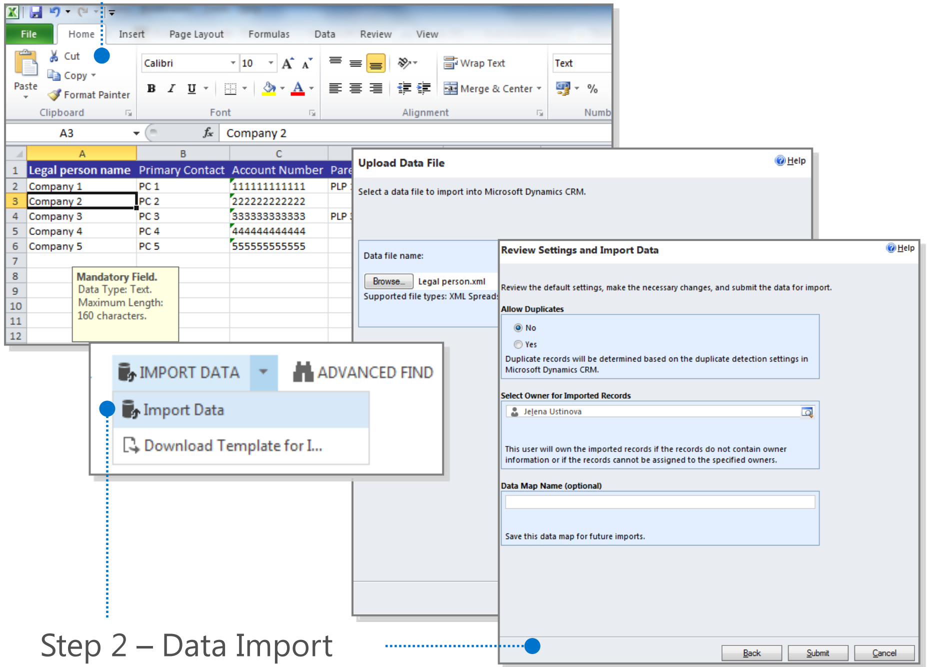


3 Step Data Import

1. Preparing file for import
2. Data Import to the System
3. Verification of Data

- Each of the registers have option to get a template for Data Import

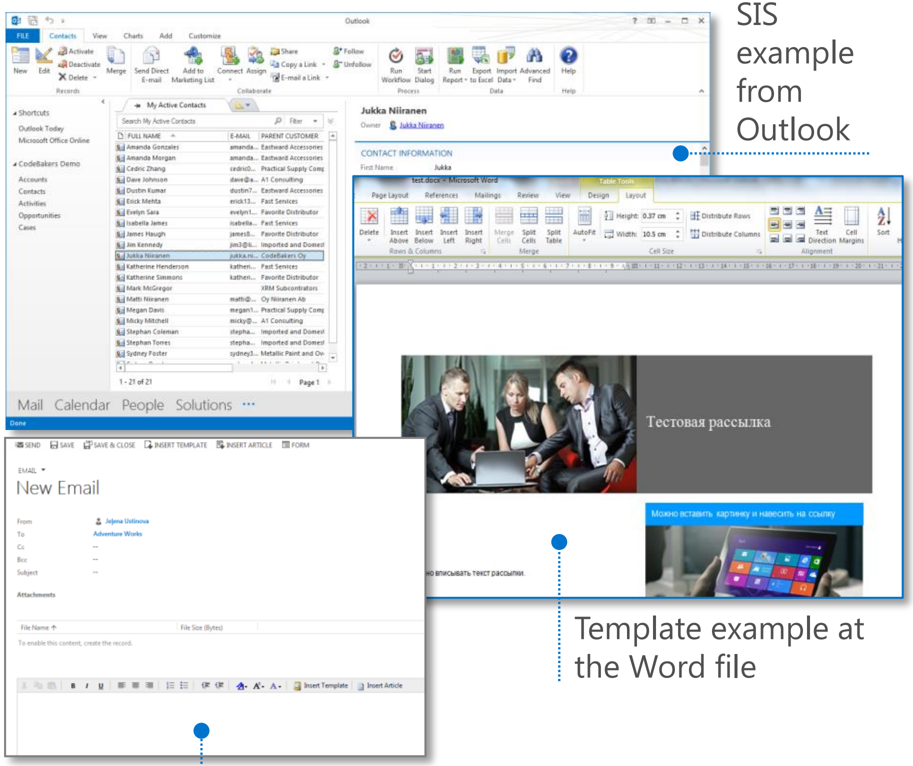
Step 1 – Filling the Template for the Data Import



Step 2 – Data Import

Communication with Clients

- Integrated email Client
- Full integration with Outlook
- Creating email template based on Word file
- Integration with Call Centre
- Integration with SMS mailing
- Compatible with Microsoft Exchange or other POP3 mail servers (example, Gmail)



SIS example from Outlook

Template example at the Word file

SIS email client

SIS Modules

Graduates

Templates

References

Exchanges

Integration module (AD, Moodle etc.)

Foreign Applicants Admission

Contracts

Orders

Internships

Surveys

Teacher Portal

Local Applicants Admission

Students (BS, MSc)

PhD

Grades

Student Portal

Academic planning

Premises logistics

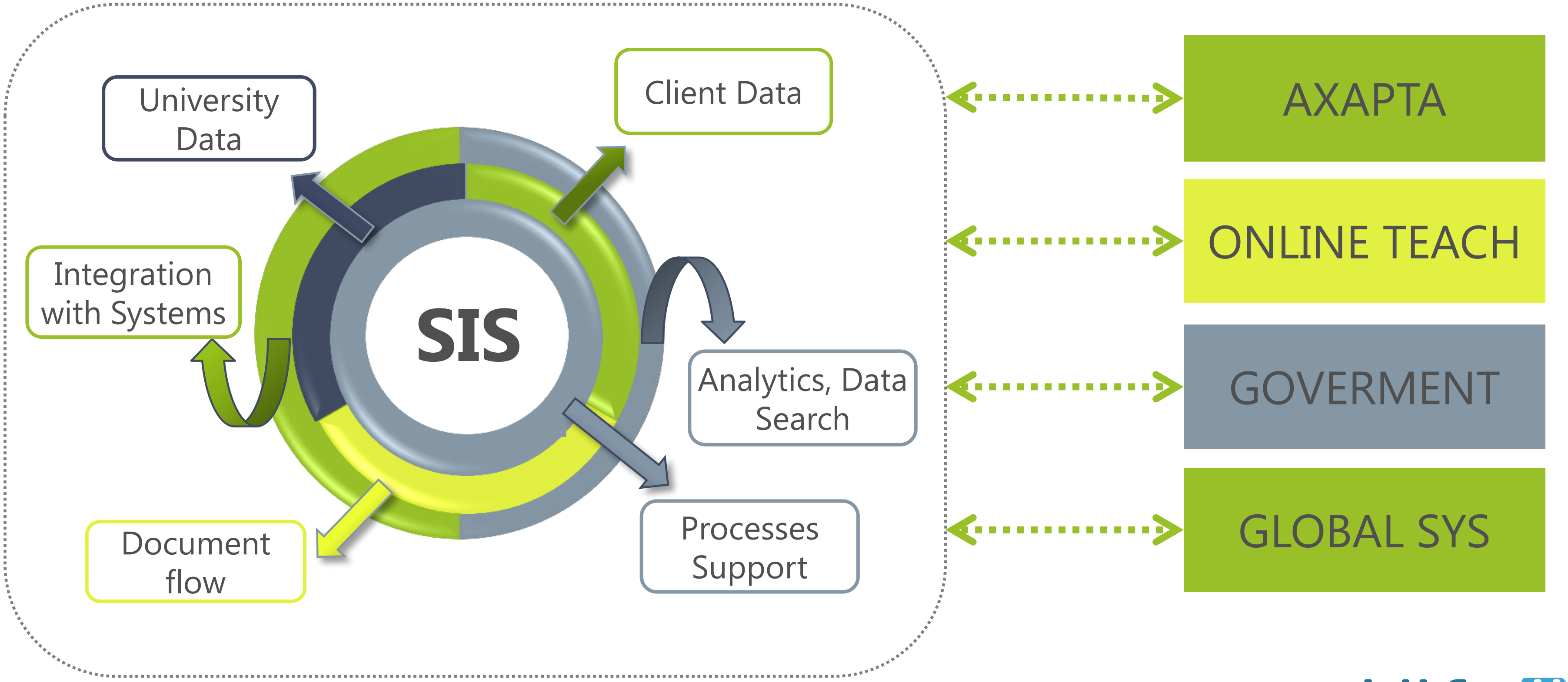
Teachers workload

Finance Module

Core Module

Standard CRM

SIS – University Processes Managment System



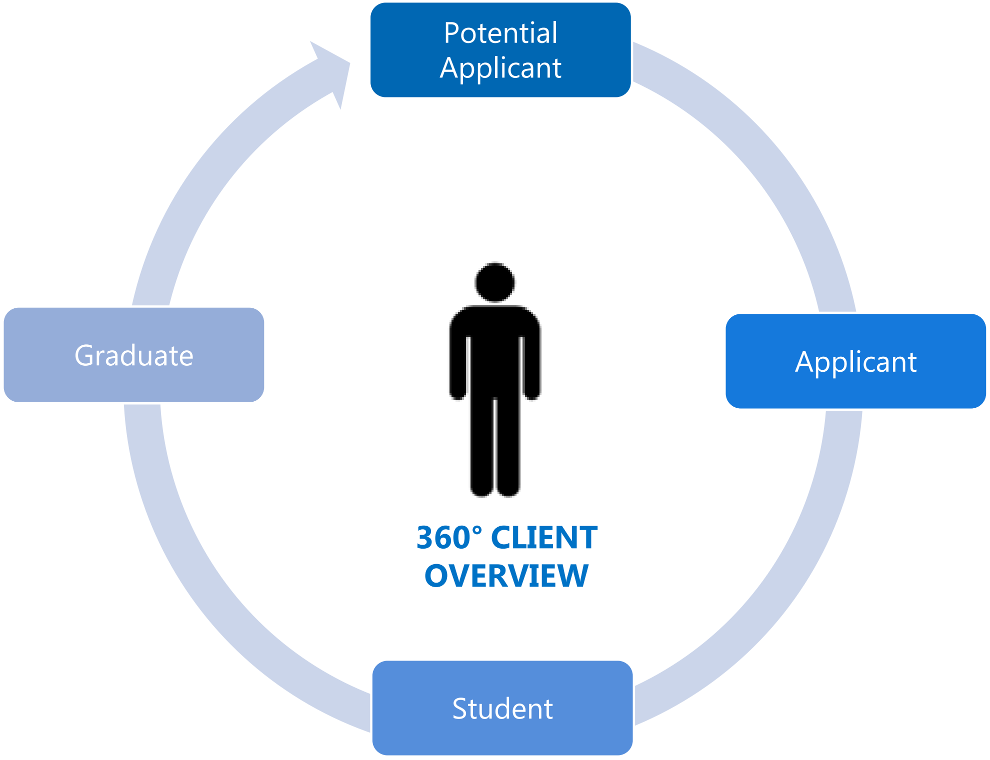
Legal Entities

- Potential Client
- Client
- Partner

Individuals

- Potential Client
- Course Participant
- Potential Applicant
- Applicant
- Student
- Intern
- PhD Student
- Graduate
- Thesis Supervisor
- Thesis Consultant
- Lecturer

Lifecycle of the Student



Business processes supported by SIS

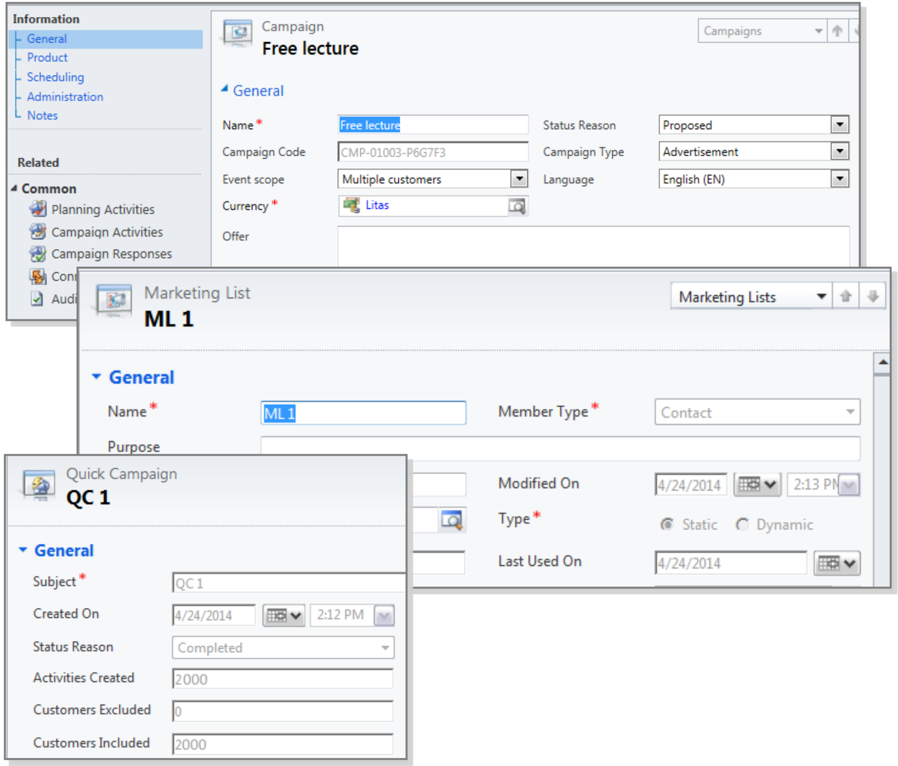
Lifecycle of the Student

Potential Applicant → Applicant → Student → Graduate

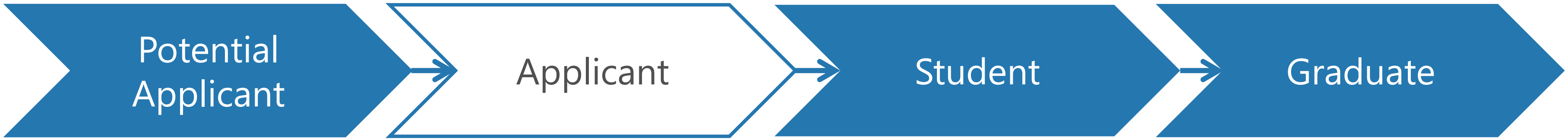
- Work with Recruiting Agencies
- Marketing

Marketing

- Management of marketing activities
- Conducting marketing campaigns, creating tasks for Marketing team
- Preparation of Marketing Lists
- Mailings in a few steps
- Monitoring Marketing Campaigns costs
- Gathering Marketing Campaigns statistics



Lifecycle of the Student

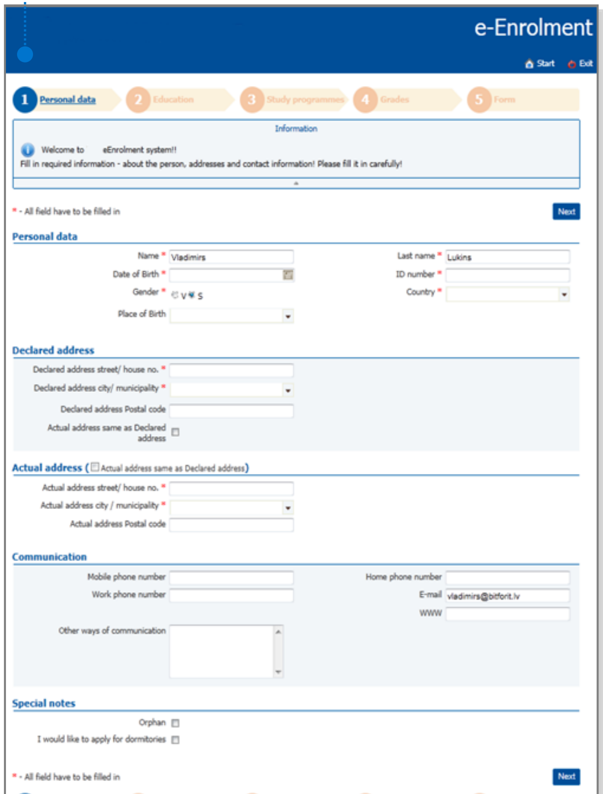


- Admission of Local Applicants
- Admission of Foreign Applicants
- Marketing

Admission of Applicants

- Portal for Applicants
- Admission on funded/tuition programmes, on first/higher semester
- Generation of contracts, admission orders, first invoices
- Accounting statistics on each Student admission period

Portal for Applicants


e-Enrolment
Start Exit
1 Personal data 2 Education 3 Study programmes 4 Grades 5 Form
Information
Welcome to eEnrolment system!!
Fill in required information - about the person, addresses and contact information! Please fill it in carefully!
* - All field have to be filled in
Next
Personal data
Name * Vladimirs
Last name * Lukins
Date of Birth *
ID number *
Gender *
Country *
Place of Birth
Declared address
Declared address street/ house no. *
Declared address city/ municipality *
Declared address Postal code
Actual address same as Declared address
Actual address (Actual address same as Declared address)
Actual address street/ house no. *
Actual address city / municipality *
Actual address Postal code
Communication
Mobile phone number
Home phone number
Work phone number
E-mail vladimirs@bitforit.lv
WWW
Other ways of communication
Special notes
Orphan
I would like to apply for dormitories
* - All field have to be filled in
Next

Operator

eApplicant

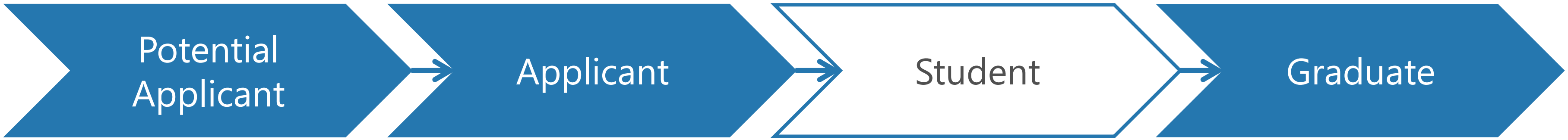
↓

Applicant

bitforit

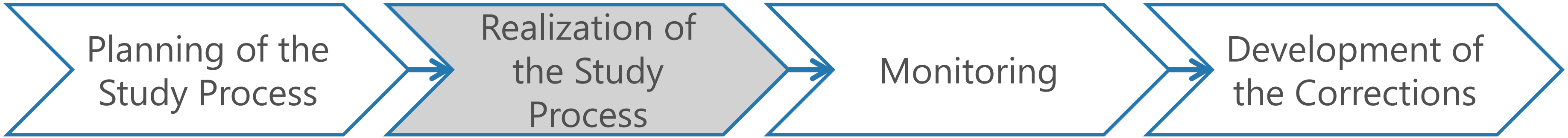
SIS

Lifecycle of the Student



- Realization of the Study Process
- Internships for Students
- Exchange Programmes
- Additional services (hostel / dormitories, IT support, conferences, etc.)
- Self-service
- Marketing

Realization of the Study Process



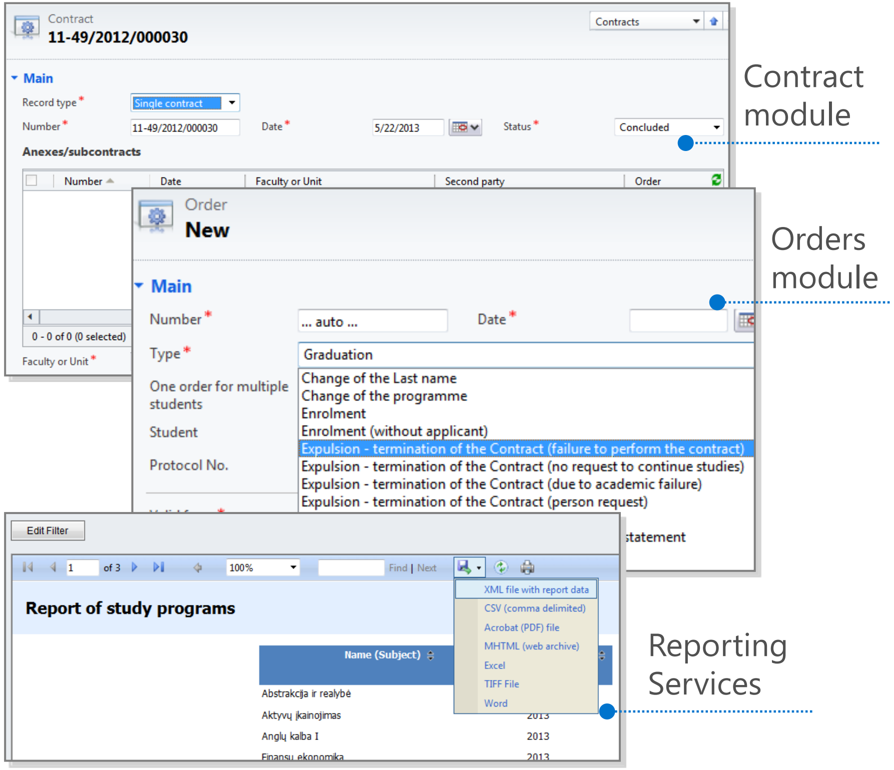
- Providing Educational Services (Semesters, Session)
- Student movement control
- Finance management related to Students and other clients of the University
- Supporting Students in the Study Process
- Marketing

Supporting Students in the Study Process

- Grant the Academic leave
- Form an Additional Subject
- Change of Personal Data
- Change of Study Programmes
- Change of Study Forms
- Creating a Personal Plan
- Expulsion of Students
- etc.

Student Document flow

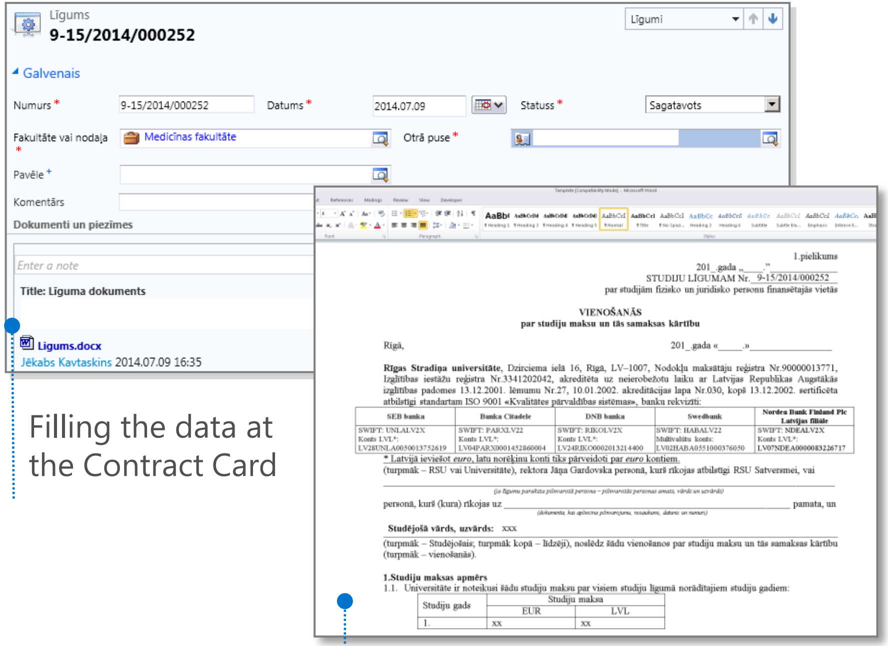
- Generating contracts, orders, references, certificates, diplomas and their annexes
- Keeping separate nomenclature for each type of document
- **Reporting Service** – a tool for creating reports and documents to unload at .xlsx, .docx, .pdf, .xml, etc.



Preparing document template on Word base

1. Document template
2. Definition of Document variable places
3. Final Document

- Templates – generation of a document based on Microsoft Word template and automatic save of the document in the System

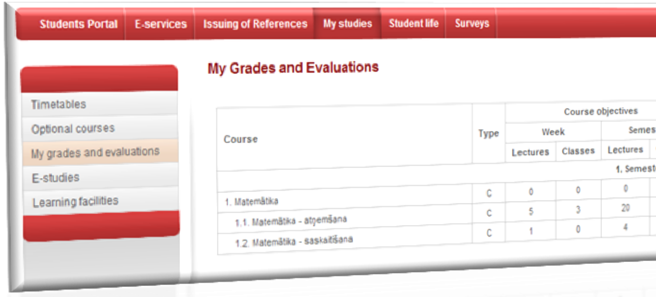


Filling the data at the Contract Card

Example of the Result

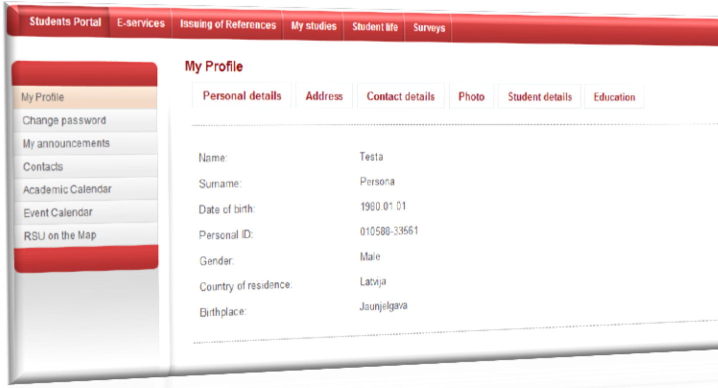
Self-service: Student Portal

- Timetables
- Study Plan
- Grades
- Order References
- Contact Information
- Finance Information
- Subject Study Plans
- FAQ
- Application Templates
- Personal Information
- Electives
- Student Exchange Programmes



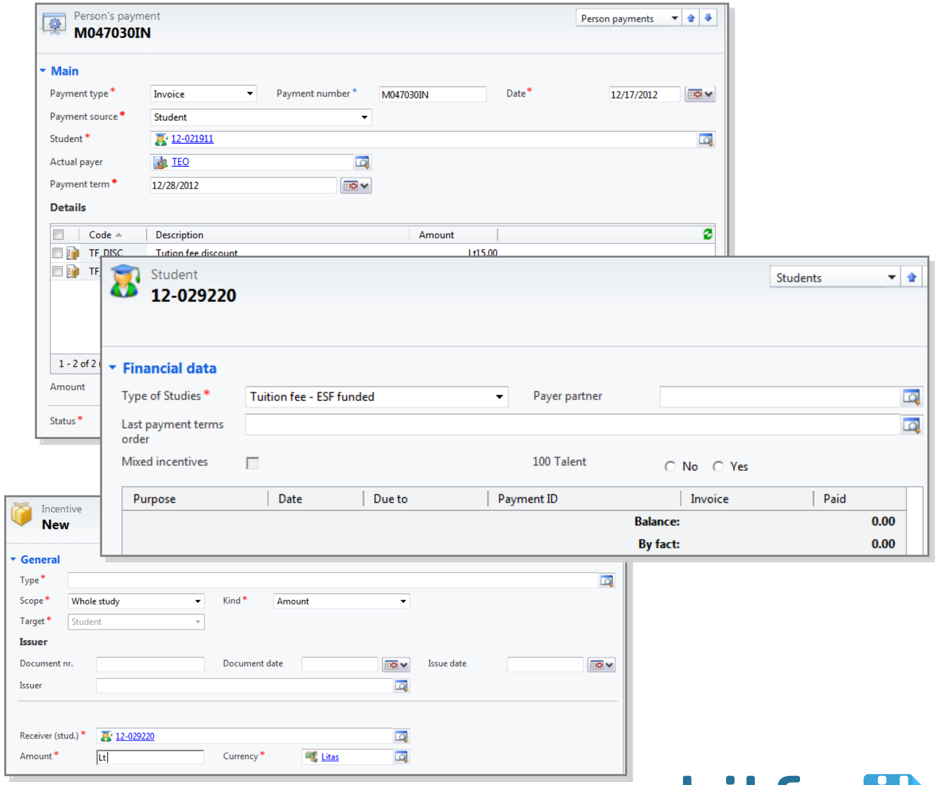
Self-service: Teacher Portal

- Timetables
- Study Plans
- Grading
- Calendar desired working hours
- Filling the Study Plan by Subjects
- Monitoring of Student Sucesses
- FAQ
- Application Templates
- Personal Information
- Scientific activities



Student Finance Flows

- Managing Student Finance Flows
- Accounting Finances on the Client level
- Automatic invoicing
- Bonuses and Discount System
- Reports on Admissions, Debts, Future Finance flows etc.



Lifecycle of the Student

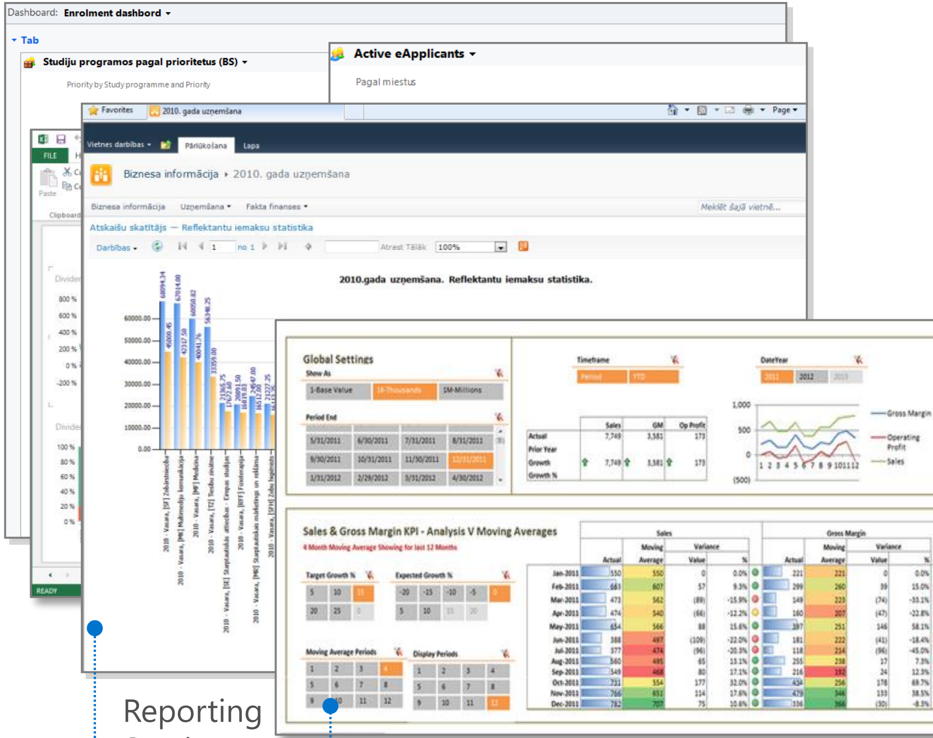
Potential Applicant → Applicant → Student → Graduate

- Setting the Theme and Appointing Supervisor
- Conducting Pre-/Denfese of Thesis
- Diplomas and their Annexes
- Work with Alumni (employment, career tracking)
- Qualification Courses
- Marketing

Business Intelligence within SIS

Business Inteligence options

- Individual sets of indicators for different groups of employees
- Export to Excel files
- Reporting Services
- PowerView
- Data Warehouse
- Summary Reports



Reporting Services

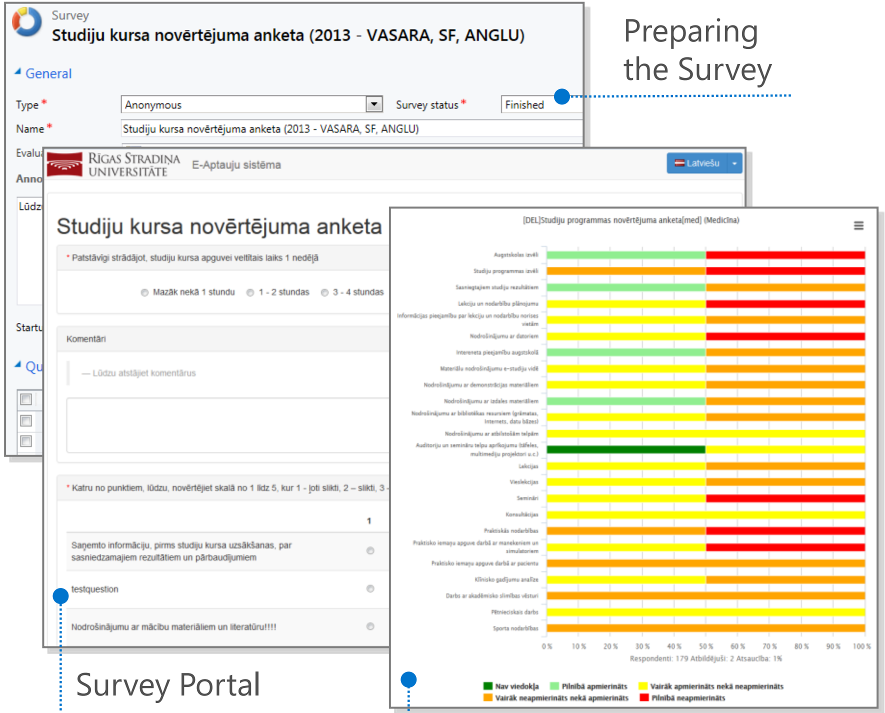
PowerPivot

SIS

bitforit

Survey Module

- Create surveys on SIS
- Surveying students, teachers, partners etc.
- Surveying based on the Course or the Study Programme
- Multi-langugage surveys with Summary reports
- Automatic and personalized mailing to Respondents



Preparing the Survey

Survey Portal

Survey Results

Advantages of SIS implementation

Process oriented	Modularity	WEB-access	Expansibility	Centralisation
Verticality	Integration with Microsoft Office	360° Data Overview	Conjugacy	Business Intelligence