



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

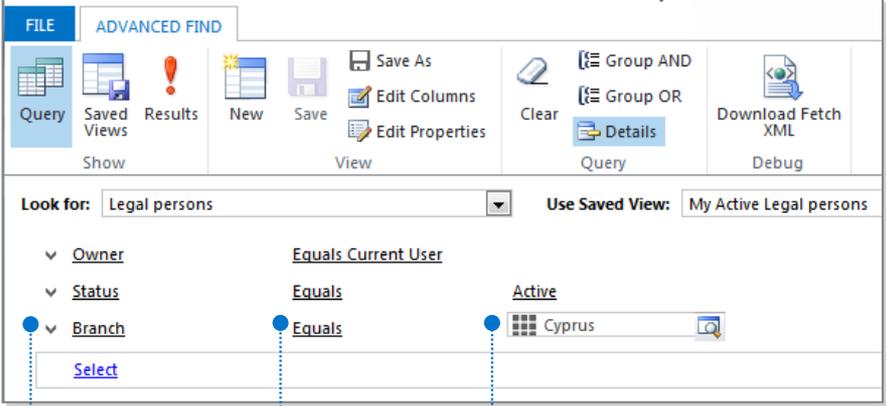
Student Information System (SIS)

What is SIS?

 <p>Microsoft Dynamics CRM 2011 – existing solution 2015 – under development</p>	<h2>Localisation</h2> <p>English and another 39 languages</p>	<h2>Data Import / Export</h2> <p>on the user level</p>	<h2>Process Driven</h2> <p>Business Process*, Flows*, Dialogs, Workflows, Business Rules*</p>
 <h2>Excel</h2> <p>full integration</p>	 <h2>Word</h2> <p>full integration (Bitfort module)</p>	 <h2>Outlook</h2> <p>full integration (with Exchange Server)</p>	 <h2>Microsoft BI</h2> <p>Excel Power Pivot Power View Reporting Services Data Mining</p>

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)



The screenshot displays the 'ADVANCED FIND' interface. At the top, there is a 'FILE' menu and a 'Look for:' dropdown set to 'Legal persons'. Below this, a table of search criteria is shown:

Field (used for filter)	Operator	Criteria
Owner	Equals	Current User
Status	Equals	Active
Branch	Equals	Cyprus

Labels 'Field (used for filter)', 'Operator', and 'Criteria' are positioned below the table with dotted lines pointing to the respective columns. The 'Branch' row is highlighted with a blue dot in the 'Field' column.

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

The screenshot shows a Microsoft Excel spreadsheet with a data table and two overlapping Dynamics CRM dialog boxes. The Excel spreadsheet has the following data:

Legal person name	Primary Contact	Account Number	Par
Company 1	PC 1	11111111111111	PLP
Company 2	PC 2	22222222222222	
Company 3	PC 3	33333333333333	PLP
Company 4	PC 4	44444444444444	
Company 5	PC 5	55555555555555	

The 'Upload Data File' dialog box is open, showing 'Legal person.xml' as the selected file. The 'Review Settings and Import Data' dialog box is also open, showing 'No' for 'Allow Duplicates' and 'Jejena Ustinova' as the 'Select Owner for Imported Records'. A yellow tooltip points to cell C2, stating: 'Mandatory Field. Data Type: Text. Maximum Length: 160 characters.'

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)

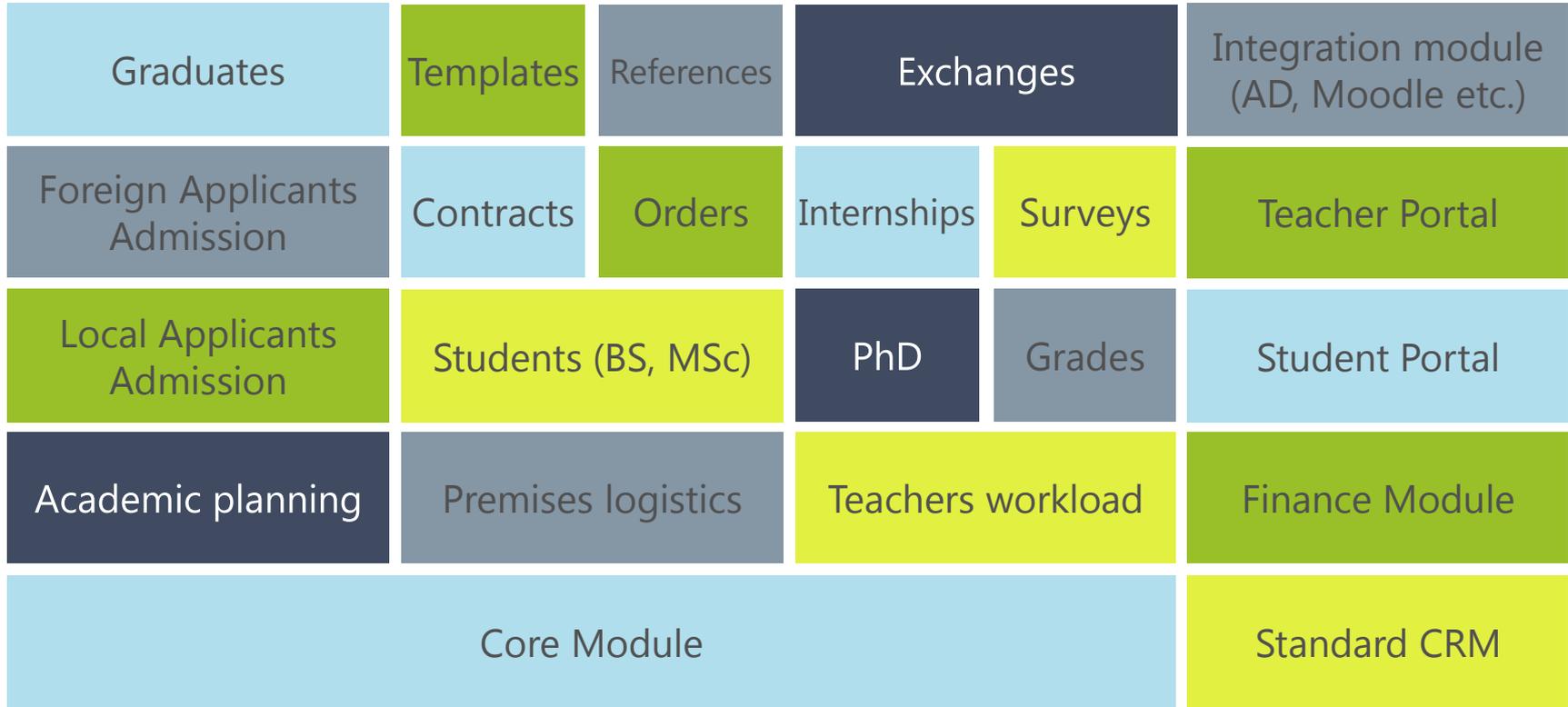
The image displays two overlapping software windows. The top window is Microsoft Outlook, showing a contact list for 'My Active Contacts' with 'Jukka Niiranen' selected. The bottom window is Microsoft Word, showing a document titled 'test.docx' with a contact information template for 'Jukka Niiranen'. The template includes fields for 'First Name' and 'Jukka', and a placeholder for a photo. A blue callout box in the Word window contains the text 'Можно вставить картинку и навести на скриншот' (You can insert a picture and point to a screenshot). A blue dot in the Outlook window points to the contact's name, and another blue dot in the Word window points to the photo placeholder. A blue line connects these two dots, indicating the data flow between the two applications.

SIS
example
from
Outlook

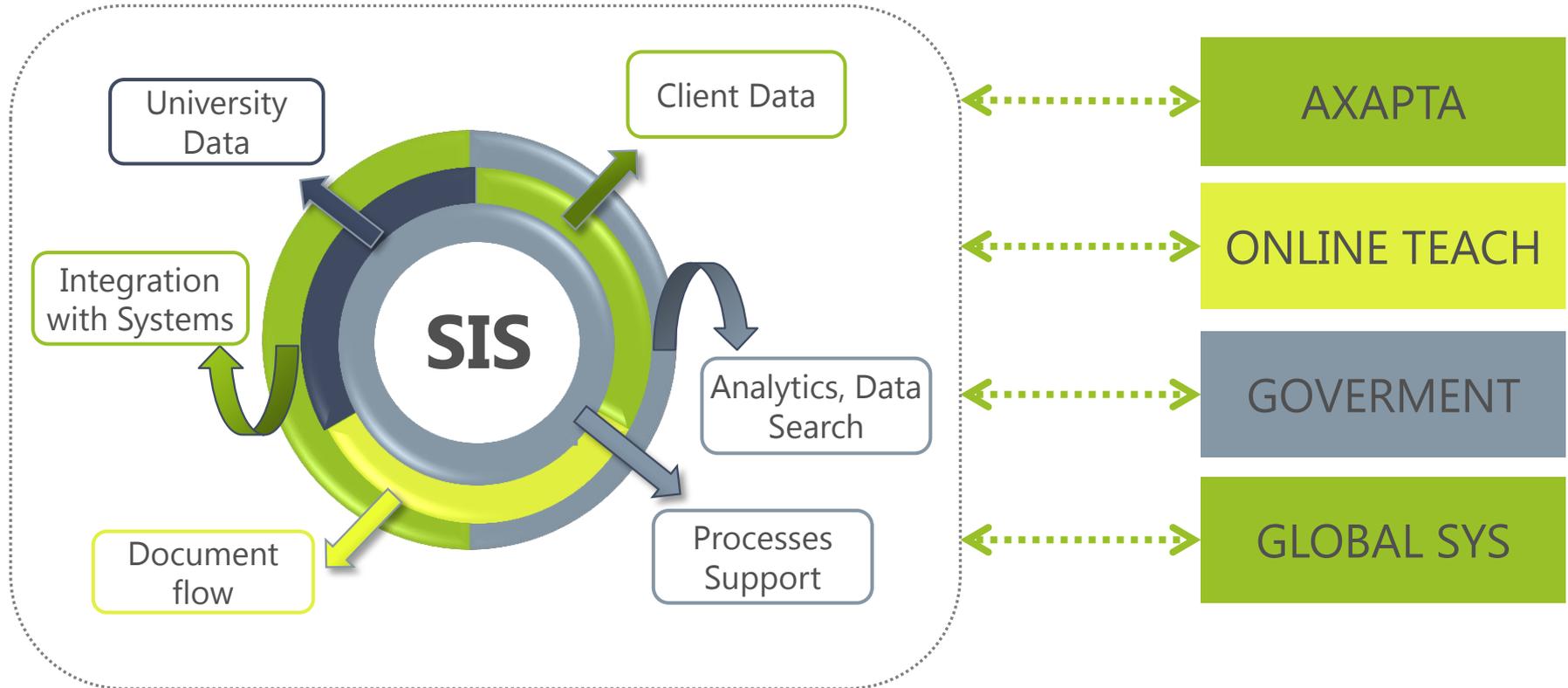
SIS email client

Template example at
the Word file

SIS Modules



SIS – University Processes Management System



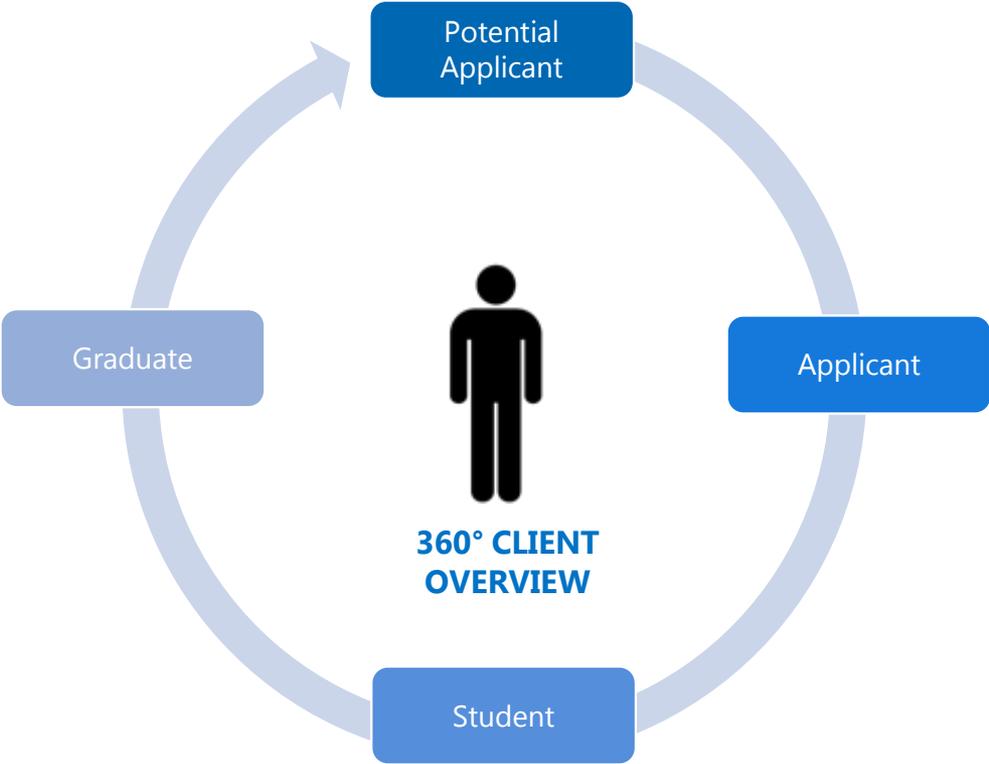
Legal Entities

- Potential Client
- Client
- Partner

Individuals

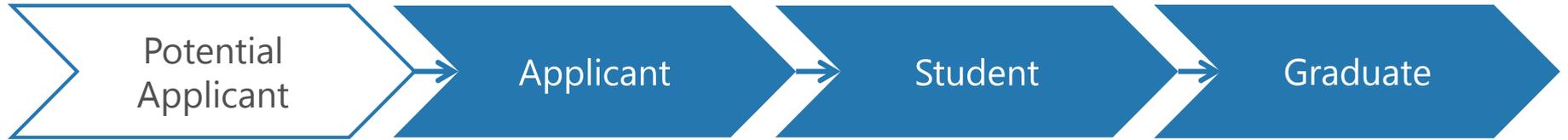
- Potential Client
- Course Participant
- Potential Applicant
- Applicant
- Student
- Intern
- PhD Student
- Graduate
- Thesis Supervisor
- Thesis Consultant
- Lecturer

Lifecycle of the Student



Business processes supported by SIS

Lifecycle of the Student



- Work with Recruiting Agencies
- Marketing

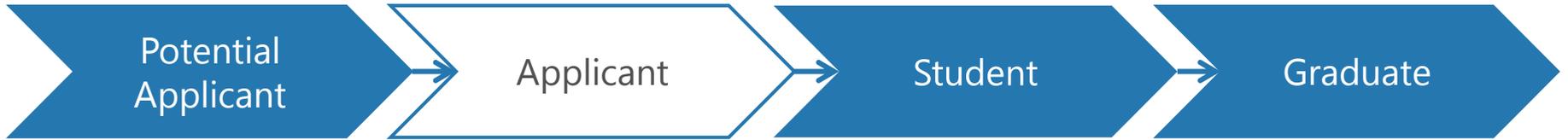
Marketing

- 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

The screenshot displays three overlapping windows from a marketing management software interface:

- Campaign Window (Free lecture):**
 - Information:** General, Product, Scheduling, Administration, Notes.
 - Related:** Common (Planning Activities, Campaign Activities, Campaign Responses), Cont, Audi.
 - General:** Name: Free lecture; Status Reason: Proposed; Campaign Code: CMP-01003-P6G7F3; Campaign Type: Advertisement; Event scope: Multiple customers; Language: English (EN); Currency: Litas; Offer: (empty).
- Marketing List Window (ML 1):**
 - General:** Name: ML 1; Member Type: Contact; Purpose: (empty); Modified On: 4/24/2014 2:13 PM; Type: Static; Last Used On: 4/24/2014.
- Quick Campaign Window (QC 1):**
 - General:** Subject: QC 1; Created On: 4/24/2014 2:12 PM; Status Reason: Completed; Activities Created: 2000; Customers Excluded: 0; Customers Included: 2000.

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

The screenshot shows the 'e-Enrolment' portal interface. At the top, there is a navigation bar with five steps: 1 Personal data, 2 Education, 3 Study programmes, 4 Grades, and 5 Home. Below this is a welcome message: 'Welcome to e-Enrolment system!! Fill in required information - about the person, addresses and contact information! Please fill it in carefully!'. A 'Next' button is visible. The form is divided into several sections: 'Personal data' with fields for Name (Vladimir), Last name (Lukins), Date of Birth, ID number, Gender (V M S), and Country; 'Declared address' with fields for street/house no., city/municipality, and postal code; 'Actual address' (with a checkbox for 'Actual address same as Declared address') with similar fields; 'Communication' with fields for mobile, work, and home phone numbers, email (vladimir@bitforit.lv), and WWW; and 'Special notes' with checkboxes for 'Orphan' and 'I would like to apply for dormitories'. A 'Next' button is at the bottom right.

Operator

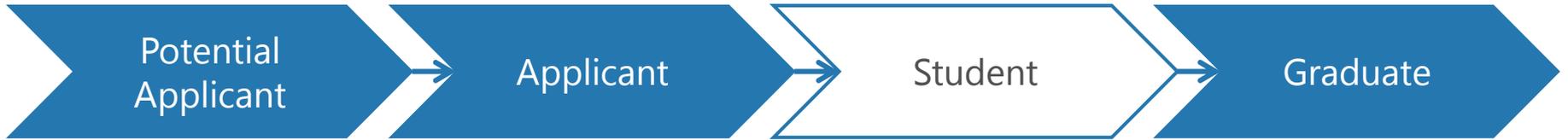


eApplicant



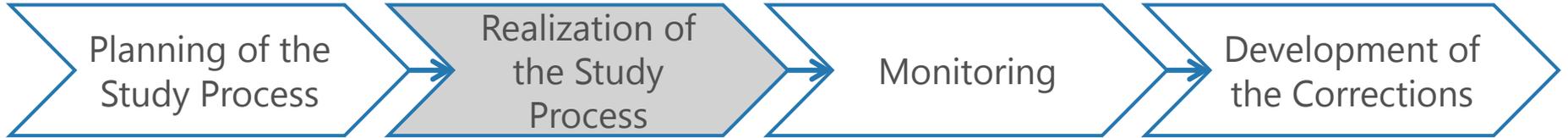
Applicant

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.

The screenshot illustrates the document flow process. It starts with the **Contract module** showing a contract for ID 11-49/2012/000030. A **Orders module** window is open, displaying a list of order types. The selected type is **Expulsion - termination of the Contract (failure to perform the contract)**. Below this, the **Reporting Services** window is shown, displaying a **Report of study programs** with a table of subjects and years. A dropdown menu is open, listing various export formats such as XML, CSV, PDF, MHTML, Excel, TIFF, and Word.

Name (Subject)	Year
Abstrakcija ir realybė	2013
Aktyvų įkainojimas	2013
Anglų kalba I	2013
Finansų ekonomika	2013

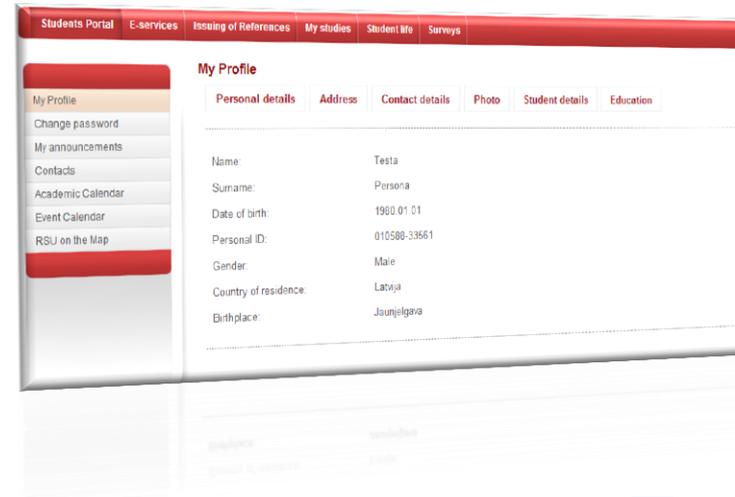
Self-service: Student Portal

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

Course	Type	Course objectives		
		Week		Semes
		Lectures	Classes	
1. Matemática	C	0	0	0
1.1. Matemática - atjendana	C	5	3	20
1.2. Matemática - saskañšana	C	1	0	4

Self-service: Teacher Portal

- Timetables
 - Study Plans
 - Grading
 - Calendar desired working hours
 - Filling the Study Plan by Subjects
 - Monitoring of Student Successes
 - 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.

The image displays two overlapping software windows from a financial management system.

The top window, titled "Person's payment" with ID "M047030IN", shows a form for recording a payment. The "Main" section includes fields for "Payment type" (Invoice), "Payment number" (M047030IN), "Date" (12/17/2012), "Payment source" (Student), "Student" (12-021911), "Actual payer" (TEO), and "Payment term" (12/28/2012). Below this is a "Details" table with columns for Code, Description, and Amount. One entry is visible: "TF_DISC" for "Tuition fee discount" with an amount of 1115.00.

The bottom window, titled "Incentive" with ID "New", shows a form for recording an incentive. The "General" section includes fields for "Type", "Scope" (Whole study), "Kind" (Amount), "Target" (Student), "Issuer" (Document nr., Document date, Issue date), and "Receiver (stud.)" (12-021220). The "Amount" field is set to [L] and the "Currency" is set to Lit.

Overlapping the bottom-right corner of the "Person's payment" window is a "Financial data" window for student "12-029220". It shows "Type of Studies" as "Tuition fee - ESF funded" and "Payer partner" as "100 Talent". A table at the bottom shows a summary of payments:

Purpose	Date	Due to	Payment ID	Invoice	Paid	
					Balance:	0.00
					By fact:	0.00

Lifecycle of the Student

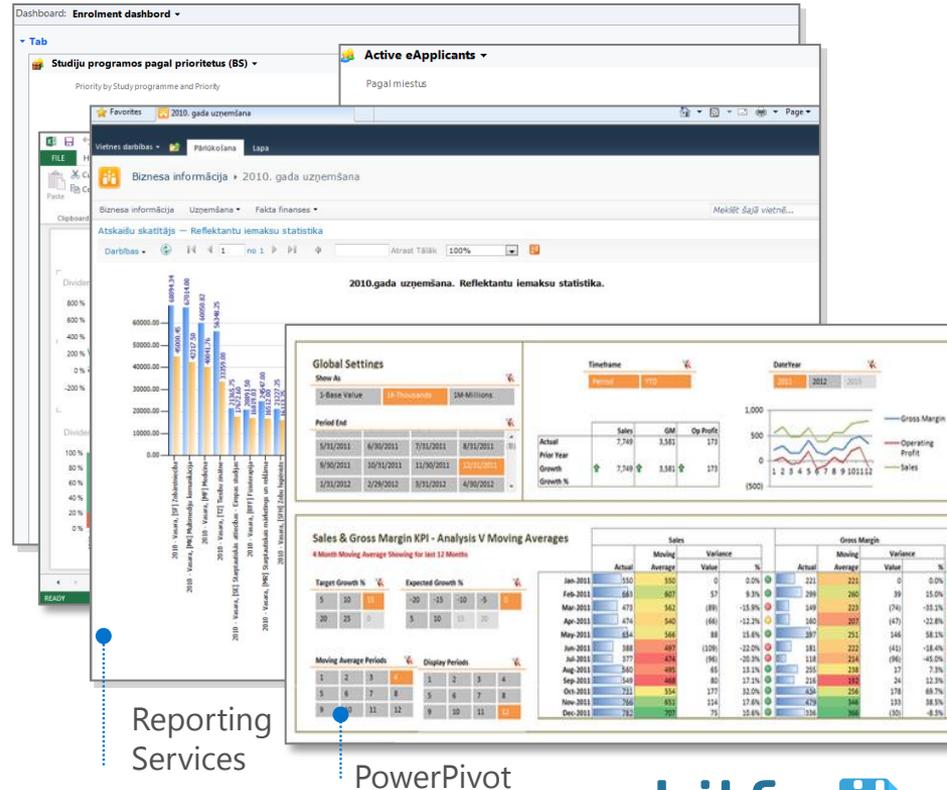


- Setting the Theme and Appointing Supervisor
- Conducting Pre-/Denfese of Thesis
- Diplomas and their Annexes
- Work with Alumni (employment, career tracking)
- Qualification Courses
- Marketing

Business Intelligence within SIS

Business Intelligence options

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



Survey Module

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

The screenshot displays the 'Survey Portal' interface for a course evaluation survey. The top section shows the survey title 'Studiju kursa novērtējuma anketa (2013 - VASARA, SF, ANGLU)' and its status as 'Finished'. Below this, there are fields for 'Type' (Anonymous) and 'Survey status' (Finished). The main content area is titled 'Studiju kursa novērtējuma anketa' and includes a 'Komentāri' section for user feedback. A 'Testquestion' section is also visible, containing a question about the survey's usefulness.

The 'Survey Results' section shows a horizontal bar chart titled '[DEL]Studiju programmas novērtējuma anketa(med) (Medicina)'. The chart displays the distribution of responses for various survey items, with a legend indicating the color coding for response categories: 'Nav vērojama' (dark green), 'Pilnībā apmierināts' (light green), 'Varbūt apmierināts nekā neapmierināts' (yellow), 'Varbūt neapmierināts nekā apmierināts' (orange), and 'Pilnībā neapmierināts' (red). The x-axis represents the percentage of respondents, ranging from 0% to 100%.

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