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**

- **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
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
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 Modules

<table>
<thead>
<tr>
<th>Graduates</th>
<th>Templates</th>
<th>References</th>
<th>Exchanges</th>
<th>Integration module (AD, Moodle etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreign Applicants Admission</td>
<td>Contracts</td>
<td>Orders</td>
<td>Internships</td>
<td>Surveys</td>
</tr>
<tr>
<td>Local Applicants Admission</td>
<td>Students (BS, MSc)</td>
<td>PhD</td>
<td>Grades</td>
<td>Teacher Portal</td>
</tr>
<tr>
<td>Academic planning</td>
<td>Premises logistics</td>
<td>Teachers workload</td>
<td>Finance Module</td>
<td></td>
</tr>
<tr>
<td>Core Module</td>
<td></td>
<td></td>
<td></td>
<td>Standard CRM</td>
</tr>
</tbody>
</table>
SIS – University Processes Management System

University Data
Integration with Systems
Document flow
SIS
Analytics, Data Search
Processes Support
Client Data

AXAPTA
ONLINE TEACH
GOVERNMENT
GLOBAL SYS
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

Potential Applicant

Graduate

Applicant

Student

360° CLIENT OVERVIEW
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
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
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
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 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.
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
Advantages of SIS implementation

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