# **School Management System - Complete Implementation Guide**

# 1. Tables (Entities) and Their Columns

### **Student**

- Student ID (Primary Key, Auto Number)
- First Name (Single Line Text, Required)
- Last Name (Single Line Text, Required)
- Date of Birth (Date Only, Required)
- Gender (Option Set: Male, Female, Other)
- Address (Multiple Lines of Text)
- City (Single Line Text)
- State/Province (Single Line Text)
- Postal Code (Single Line Text)
- Country (Single Line Text)
- Email (Email, Required)
- **Phone** (Phone Number)
- Parent/Guardian Name (Single Line Text, Required)
- Parent/Guardian Contact (Phone Number, Required)
- Emergency Contact Name (Single Line Text)
- Emergency Contact Number (Phone Number)
- Admission Date (Date Only, Required)
- Status (Option Set: Active, Inactive, Suspended, Graduated)
- **Photo** (Image)
- **Blood Group** (Option Set: A+, A-, B+, B-, AB+, AB-, O+, O-)
- Medical Information (Multiple Lines of Text)
- Class (Lookup to Class)

#### **Teacher**

- Teacher ID (Primary Key, Auto Number)
- First Name (Single Line Text, Required)
- Last Name (Single Line Text, Required)
- Date of Birth (Date Only)
- Gender (Option Set: Male, Female, Other)
- Address (Multiple Lines of Text)
- Email (Email, Required)
- Phone (Phone Number, Required)
- Hire Date (Date Only, Required)
- Qualification (Multiple Lines of Text)

- Specialization (Single Line Text)
- Status (Option Set: Active, On Leave, Terminated, Retired)
- Photo (Image)
- Emergency Contact Name (Single Line Text)
- Emergency Contact Number (Phone Number)

#### Course

- Course ID (Primary Key, Auto Number)
- Course Name (Single Line Text, Required)
- Course Code (Single Line Text, Required)
- **Description** (Multiple Lines of Text)
- Credit Hours (Whole Number)
- Grade Level (Option Set: Primary, Middle School, High School)
- Status (Option Set: Active, Inactive, Archived)
- Primary Teacher (Lookup to Teacher)

#### **Class**

- Class ID (Primary Key, Auto Number)
- Class Name (Single Line Text, Required)
- Grade/Year (Option Set: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12)
- **Section** (Single Line Text)
- Room Number (Single Line Text)
- Academic Year (Single Line Text, Required)
- Start Date (Date Only)
- End Date (Date Only)
- Max Capacity (Whole Number)
- Current Student Count (Whole Number)
- Class Teacher (Lookup to Teacher)
- Status (Option Set: Active, Inactive)

### **Enrollment**

- Enrollment ID (Primary Key, Auto Number)
- Student (Lookup to Student, Required)
- Course (Lookup to Course, Required)
- Class (Lookup to Class, Required)
- Enrollment Date (Date Only, Required)
- Status (Option Set: Enrolled, Dropped, Completed)
- Grade (Option Set: A, B, C, D, F, Incomplete)
- Academic Year (Single Line Text, Required)

- Term/Semester (Option Set: Fall, Spring, Summer, Annual)
- Notes (Multiple Lines of Text)

#### **Attendance**

- Attendance ID (Primary Key, Auto Number)
- Student (Lookup to Student, Required)
- Class (Lookup to Class, Required)
- Date (Date Only, Required)
- Status (Option Set: Present, Absent, Late, Excused)
- Notes (Multiple Lines of Text)
- Recorded By (Lookup to Teacher)
- Recording Time (Date and Time)

### **Assessment**

- Assessment ID (Primary Key, Auto Number)
- Student (Lookup to Student, Required)
- Course (Lookup to Course, Required)
- Assessment Type (Option Set: Quiz, Test, Exam, Assignment, Project)
- Assessment Date (Date Only, Required)
- Max Score (Decimal Number)
- Scored Points (Decimal Number)
- Percentage (Decimal Number)
- Grade (Option Set: A+, A, A-, B+, B, B-, C+, C, C-, D+, D, F)
- Comments (Multiple Lines of Text)
- **Teacher** (Lookup to Teacher)
- Status (Option Set: Scheduled, Conducted, Graded, Published)

### Fee

- Fee ID (Primary Key, Auto Number)
- Fee Name (Single Line Text, Required)
- **Description** (Multiple Lines of Text)
- Fee Type (Option Set: Tuition, Transportation, Library, Laboratory, Sports, Exam, Other)
- Amount (Currency, Required)
- Due Date (Date Only, Required)
- Class (Lookup to Class)
- Academic Year (Single Line Text, Required)
- Term/Semester (Option Set: Fall, Spring, Summer, Annual)
- Status (Option Set: Active, Inactive)

### **Payment**

- Payment ID (Primary Key, Auto Number)
- Student (Lookup to Student, Required)
- Fee (Lookup to Fee, Required)
- Payment Date (Date Only, Required)
- Amount Paid (Currency, Required)
- Payment Method (Option Set: Cash, Check, Credit Card, Bank Transfer, Online Payment)
- Transaction ID (Single Line Text)
- Receipt Number (Single Line Text)
- Status (Option Set: Pending, Completed, Failed, Refunded)
- Notes (Multiple Lines of Text)
- **Processed By** (Single Line Text)

#### Communication

- Communication ID (Primary Key, Auto Number)
- Title (Single Line Text, Required)
- Content (Multiple Lines of Text, Required)
- Category (Option Set: Announcement, Notice, Event, Emergency)
- Audience (Option Set: All, Students, Teachers, Parents, Specific Class)
- Target Class (Lookup to Class)
- Start Date (Date Only, Required)
- End Date (Date Only)
- Created By (Single Line Text)
- Creation Date (Date and Time)
- Status (Option Set: Draft, Published, Archived)

# 2. Relationships

- 1. **Student to Class**: Many-to-One (Each student belongs to one class, but a class has many students)
- 2. **Teacher to Class**: One-to-Many (A teacher can be the primary teacher for multiple classes)
- 3. **Student to Enrollment**: One-to-Many (A student can have multiple enrollments)
- 4. Course to Enrollment: One-to-Many (A course can have multiple enrollments)
- 5. Class to Enrollment: One-to-Many (A class can have multiple enrollments)
- 6. Student to Attendance: One-to-Many (A student has multiple attendance records)
- 7. Class to Attendance: One-to-Many (A class has multiple attendance records)
- 8. **Student to Assessment**: One-to-Many (A student has multiple assessments)
- 9. Course to Assessment: One-to-Many (A course has multiple assessments)
- 10. **Teacher to Assessment**: One-to-Many (A teacher grades multiple assessments)
- 11. Student to Payment: One-to-Many (A student makes multiple payments)
- 12. **Fee to Payment**: One-to-Many (A fee type has multiple payment records)
- 13. **Teacher to Course**: One-to-Many (A teacher can teach multiple courses)

- 14. Class to Fee: One-to-Many (A class may have multiple fees associated)
- 15. Class to Communication: One-to-Many (Communications can target specific classes)

# 3. Forms Design

### **Student Form**

### • Information Tab

- Basic Information Section (ID, Name, DoB, Gender, Photo)
- Contact Information Section (Address, Email, Phone)
- Guardian Information Section
- Medical Information Section

### • Academic Tab

- Class Information
- Enrollment History Subgrid
- Assessment Summary Subgrid

### • Attendance Tab

• Attendance Records Subgrid

#### • Financial Tab

- Payment History Subgrid
- Pending Fees Subgrid

### **Teacher Form**

### • Information Tab

- Basic Information Section (ID, Name, DoB, Gender, Photo)
- Contact Information Section
- Professional Information Section (Hire Date, Qualification, Specialization)

### Classes Tab

- Classes Taught Subgrid
- Students Subgrid

# **Course Form**

### • Information Tab

- Basic Information Section
- Description Section

### Classes Tab

• Associated Classes Subgrid

# • Students Tab

• Enrolled Students Subgrid

### • Assessments Tab

Assessments Subgrid

#### **Class Form**

- Information Tab
  - Basic Information Section
  - Academic Year Section
- Students Tab
  - Enrolled Students Subgrid
- Courses Tab
  - Associated Courses Subgrid
- Attendance Tab
  - Daily Attendance Summary Subgrid

### **Enrollment Form**

- Student and Course Details
- Enrollment Status
- Grade Information

### **Attendance Form**

- Date and Student Information
- Attendance Status
- Notes

#### **Assessment Form**

- Basic Info Tab
  - Student and Course Details
  - Assessment Type and Date
- Grading Tab
  - Score and Grade Information
  - Comments

## **Fee Form**

- Fee Details
- Amount and Due Date
- Associated Class

# **Payment Form**

- Student and Fee Details
- Payment Amount and Method
- Transaction Details

### **Communication Form**

• Title and Content

- Audience Selection
- Publication Dates

### 4. Views

#### **Student Views**

- Active Students View (Filter: Status = Active)
- Students by Class View (Group By: Class)
- Recent Admissions View (Filter: Admission Date = Last 30 days)
- Graduating Students View (Filter: Status = Graduating)

#### **Teacher Views**

- Active Teachers View (Filter: Status = Active)
- Teachers by Specialization View (Group By: Specialization)
- Recently Hired View (Filter: Hire Date = Last 60 days)

#### **Course Views**

- Active Courses View (Filter: Status = Active)
- Courses by Grade Level View (Group By: Grade Level)

#### **Class Views**

- Current Classes View (Filter: Status = Active)
- Classes by Grade View (Group By: Grade/Year)
- Classes at Capacity View (Filter: Current Student Count >= Max Capacity)

### **Enrollment Views**

- Current Enrollments View (Filter: Status = Enrolled)
- Enrollments by Course View (Group By: Course)
- Enrollments by Class View (Group By: Class)

### **Attendance Views**

- Today's Attendance View (Filter: Date = Today)
- Absent Students Today View (Filter: Date = Today, Status = Absent)
- Attendance by Class View (Group By: Class)
- Monthly Attendance Summary View (Group By: Student, Filter: Date = This Month)

### **Assessment Views**

- Recent Assessments View (Filter: Assessment Date = Last 30 days)
- Pending Grading View (Filter: Status = Conducted)
- Assessments by Course View (Group By: Course)
- Assessment Performance View (Sort By: Percentage DESC)

### **Fee Views**

- Current Fees View (Filter: Status = Active)
- Upcoming Due Fees View (Filter: Due Date = Next 30 days)
- Fees by Type View (Group By: Fee Type)

# **Payment Views**

- Recent Payments View (Filter: Payment Date = Last 30 days)
- Pending Payments View (Filter: Status = Pending)
- Payments by Method View (Group By: Payment Method)

### **Communication Views**

- Active Communications View (Filter: Status = Published)
- Communications by Category View (Group By: Category)
- **Draft Communications View** (Filter: Status = Draft)

## 5. Charts and Dashboards

### **Charts**

- 1. Student Enrollment Trend Line chart showing enrollment numbers over time
- 2. Attendance Rate by Class Bar chart showing attendance percentage by class
- 3. **Assessment Performance Distribution** Pie chart showing grade distribution
- 4. Fee Collection Progress Gauge chart showing percentage of fees collected vs. outstanding
- 5. **Gender Distribution** Pie chart showing gender distribution of students
- 6. Enrollment by Course Bar chart showing number of students enrolled in each course
- 7. **Teacher-Student Ratio** Column chart comparing number of teachers to students by department
- 8. Monthly Payment Summary Line chart showing fee collection trend by month
- 9. **Attendance Trend** Line chart showing attendance percentage over time
- 10. Class Capacity Utilization Bar chart showing current vs. maximum capacity for each class

### **Dashboards**

### **School Administrator Dashboard**

- Student enrollment trends
- Fee collection status
- Teacher attendance summary
- Recent communications
- Class capacity utilization
- Quick access to common actions (new student, new teacher, etc.)

#### **Teacher Dashboard**

- Class attendance summary
- Upcoming assessments

- Recent assessments to grade
- Student performance in their courses
- Recent communications
- Quick access to take attendance, add assessment

#### **Student Affairs Dashboard**

- Daily attendance summary
- Students with consecutive absences
- Disciplinary cases
- Medical incidents
- Recent communications to students

### **Finance Dashboard**

- Fee collection progress
- · Recent payments
- Upcoming due payments
- Payment method distribution
- Outstanding fees by class
- Fee collection trend

### **Academic Performance Dashboard**

- Assessment performance by class
- Assessment performance by course
- Grade distribution
- Top performing students
- Courses with highest/lowest pass rates

### 6. Business Rules

### **Calculated Fields**

- 1. Student Age Calculate based on Date of Birth
- 2. Current Student Count (Class) Count of active enrollments
- 3. Attendance Percentage (Student) Calculate based on attendance records
- 4. Outstanding Fee Amount (Student) Calculate based on fee and payment records
- 5. GPA/Overall Grade (Student) Calculate based on assessment records
- 6. Assessment Percentage Calculate from Scored Points / Max Score
- 7. Days Until Due (Fee) Calculate from Due Date Today

# **Business Process Flows**

- 1. Student Admission Process
  - Initial Information → Document Verification → Fee Payment → Class Assignment → Completed

#### 2. Assessment Process

• Scheduled → Conducted → Graded → Published

#### 3. Fee Collection Process

• Generated → Notified → Partially Paid → Fully Paid

#### Form Rules

### 1. Auto-populate fields:

- Auto-populate grade level based on class selection
- Auto-calculate age based on date of birth

### 2. Field validation:

- Ensure due date is in the future
- Ensure assessment date is not in the future
- Validate that scored points don't exceed max score

### 3. Conditional visibility:

- Show medical information section only if relevant option is selected
- Show payment details only if payment status is "Completed"

### **Workflows and Automations**

- 1. Attendance Notification Notify parents when student is marked absent
- 2. Fee Due Reminder Send reminder 7 days before fee due date
- 3. Assessment Result Notification Notify students/parents when assessment results are published
- 4. Class Capacity Alert Alert administrators when class reaches 90% capacity
- 5. Consecutive Absence Alert Alert when student has been absent for 3 consecutive days
- 6. Auto-generate Receipt Generate receipt number when payment is completed
- 7. Communication Expiry Automatically archive communications past their end date
- 8. **Report Card Generation** Generate report cards at the end of term based on assessments

# 7. Security Roles

### **School Administrator**

- Full access to all entities
- Can create, read, write, delete records in all entities
- Can assign security roles
- Can customize the system

# **Teacher**

- Create, read, update, delete access to:
  - Own courses
  - Own class records
  - Attendance for own classes
  - Assessments for own courses

- Read-only access to:
  - Student information
  - Fee information
- No access to:
  - Payment details
  - System configuration

### **Finance Officer**

- Full access to:
  - Fee records
  - Payment records
- Read access to:
  - Student information
  - Class information
- No access to:
  - Assessment details
  - Attendance records

### **Student Affairs Officer**

- Full access to:
  - Student records
  - Attendance records
  - Communications
- Read access to:
  - Course information
  - Class information
  - Assessment summaries
- No access to:
  - Payment details
  - System configuration

# Registrar

- Full access to:
  - Student records
  - Enrollment records
  - Class records
- Read access to:
  - Course information
  - Teacher information
- Limited access to:

- Assessment records (summaries only)
- Attendance summaries

# 8. Implementation Roadmap

### Phase 1: Data Model Setup (Weeks 1-2)

- Create all entities with their fields
- Establish relationships between entities
- Set up calculated fields and basic business rules
- Configure security roles

### Phase 2: Forms and Views Development (Weeks 3-4)

- · Design and create all forms
- Set up required views
- Implement form rules and field validations
- Test data entry and data relationship integrity

# Phase 3: Business Process Implementation (Weeks 5-6)

- Configure business process flows
- Implement workflows and automations
- Set up notification systems
- Test business process execution

### Phase 4: Reporting and Analytics (Weeks 7-8)

- · Create charts and dashboards
- Implement reporting functionality
- Set up data export capabilities
- Test analytical tools and data visualization

# Phase 5: Testing and Refinement (Weeks 9-10)

- Conduct user acceptance testing
- Refine forms, views, and processes based on feedback
- Optimize performance
- Document system configuration

### Phase 6: Training and Deployment (Weeks 11-12)

- Prepare training materials
- Conduct user training sessions
- Migrate initial data
- Go-live preparation and launch

# 9. Code Elements

**Client-Side JavaScript - Form Scripts** 

**Student Form Script** 

javascript

```
// Student Form OnLoad script
function onStudentFormLoad() {
    // Calculate age based on date of birth
    var dob = Xrm.Page.getAttribute("new_dateofbirth").getValue();
    if (dob) {
        var today = new Date();
        var age = today.getFullYear() - dob.getFullYear();
        var m = today.getMonth() - dob.getMonth();
        if (m < 0 || (m === 0 && today.getDate() < dob.getDate())) {</pre>
        }
        Xrm.Page.getAttribute("new_age").setValue(age);
    // Check if medical info is required based on status
    var hasMedicalCondition = Xrm.Page.getAttribute("new_hasmedicalcondition").getValue();
    if (hasMedicalCondition) {
        Xrm.Page.getControl("new_medicalinformation").setVisible(true);
        Xrm.Page.getAttribute("new medicalinformation").setRequiredLevel("required");
    } else {
        Xrm.Page.getControl("new_medicalinformation").setVisible(false);
        Xrm.Page.getAttribute("new medicalinformation").setRequiredLevel("none");
    }
}
// Student Form OnChange - Medical Condition
function onMedicalConditionChange() {
    var hasMedicalCondition = Xrm.Page.getAttribute("new hasmedicalcondition").getValue();
    if (hasMedicalCondition) {
        Xrm.Page.getControl("new_medicalinformation").setVisible(true);
        Xrm.Page.getAttribute("new medicalinformation").setRequiredLevel("required");
    } else {
        Xrm.Page.getControl("new medicalinformation").setVisible(false);
        Xrm.Page.getAttribute("new medicalinformation").setRequiredLevel("none");
    }
}
// Student Form OnChange - Class
function onClassChange() {
    var classId = Xrm.Page.getAttribute("new_classid").getValue();
    if (classId != null) {
        // Get class details to populate grade level
        Xrm.WebApi.retrieveRecord("new_class", classId[0].id, "?$select=new_gradelevel").then(
            function success(result) {
                Xrm.Page.getAttribute("new gradelevel").setValue(result.new gradelevel);
            },
            function(error) {
                console.log(error.message);
            }
        );
    }
}
```

**Assessment Form Script** 

javascript

```
// Assessment Form OnLoad script
function onAssessmentFormLoad() {
    // Calculate percentage when form loads
    calculatePercentage();
    // Set default values for new records
    if (Xrm.Page.ui.getFormType() == 1) { // Create form
        var today = new Date();
        Xrm.Page.getAttribute("new assessmentdate").setValue(today);
        Xrm.Page.getAttribute("new_status").setValue(100000000); // Scheduled status
    }
}
// Assessment Form OnChange - Scored Points
function onScoredPointsChange() {
    calculatePercentage();
    determineGrade();
}
// Assessment Form OnChange - Max Score
function onMaxScoreChange() {
    calculatePercentage();
    determineGrade();
}
// Function to calculate percentage
function calculatePercentage() {
    var scoredPoints = Xrm.Page.getAttribute("new scoredpoints").getValue();
    var maxScore = Xrm.Page.getAttribute("new_maxscore").getValue();
    if (scoredPoints != null && maxScore != null && maxScore > 0) {
        var percentage = (scoredPoints / maxScore) * 100;
        Xrm.Page.getAttribute("new_percentage").setValue(percentage);
    }
}
// Function to determine grade based on percentage
function determineGrade() {
    var percentage = Xrm.Page.getAttribute("new_percentage").getValue();
    if (percentage != null) {
        var grade;
        if (percentage >= 97) grade = 100000000; // A+
        else if (percentage >= 93) grade = 100000001; // A
        else if (percentage >= 90) grade = 100000002; // A-
        else if (percentage >= 87) grade = 100000003; // B+
        else if (percentage >= 83) grade = 100000004; // B
        else if (percentage >= 80) grade = 100000005; // B-
        else if (percentage >= 77) grade = 100000006; // C+
        else if (percentage >= 73) grade = 100000007; // C
        else if (percentage >= 70) grade = 100000008; // C-
        else if (percentage >= 67) grade = 100000009; // D+
        else if (percentage >= 60) grade = 100000010; // D
```

```
else grade = 100000011; // F

Xrm.Page.getAttribute("new_grade").setValue(grade);
}
```

## **Attendance Form Script**

```
javascript
// Attendance Form OnLoad script
function onAttendanceFormLoad() {
    // Set default values for new records
    if (Xrm.Page.ui.getFormType() == 1) { // Create form
        var today = new Date();
        Xrm.Page.getAttribute("new date").setValue(today);
        Xrm.Page.getAttribute("new_recordingtime").setValue(today);
        // Set current user as "Recorded By"
        var currentUser = Xrm.Utility.getGlobalContext().userSettings;
        var lookup = new Array();
        lookup[0] = new Object();
        lookup[0].id = currentUser.userId;
        lookup[0].name = currentUser.userName;
        lookup[0].entityType = "systemuser";
        Xrm.Page.getAttribute("new recordedby").setValue(lookup);
    }
}
// Attendance Form OnChange - Status
function onAttendanceStatusChange() {
    var status = Xrm.Page.getAttribute("new_status").getValue();
    // If absent or late, make notes field required
    if (status == 1000000001 || status == 100000002) { // Absent or Late
        Xrm.Page.getControl("new_notes").setVisible(true);
        Xrm.Page.getAttribute("new notes").setRequiredLevel("required");
    } else {
        Xrm.Page.getControl("new_notes").setVisible(true);
        Xrm.Page.getAttribute("new_notes").setRequiredLevel("none");
    }
}
```

### **Payment Form Script**

javascript

```
// Payment Form OnLoad script
function onPaymentFormLoad() {
    // Set default values for new records
    if (Xrm.Page.ui.getFormType() == 1) { // Create form
        var today = new Date();
        Xrm.Page.getAttribute("new paymentdate").setValue(today);
        Xrm.Page.getAttribute("new_status").setValue(100000000); // Pending status
       // Generate receipt number
        generateReceiptNumber();
    }
   // Set field visibility based on payment method
    var paymentMethod = Xrm.Page.getAttribute("new paymentmethod").getValue();
    setFieldVisibilityBasedOnPaymentMethod(paymentMethod);
}
// Payment Form OnChange - Payment Method
function onPaymentMethodChange() {
    var paymentMethod = Xrm.Page.getAttribute("new_paymentmethod").getValue();
    setFieldVisibilityBasedOnPaymentMethod(paymentMethod);
}
// Payment Form OnChange - Fee
function onFeeChange() {
    var feeId = Xrm.Page.getAttribute("new_feeid").getValue();
    if (feeId != null) {
       // Get fee amount to populate payment amount
       Xrm.WebApi.retrieveRecord("new_fee", feeId[0].id, "?$select=new_amount").then(
            function success(result) {
                Xrm.Page.getAttribute("new amountpaid").setValue(result.new amount);
           },
            function(error) {
                console.log(error.message);
            }
        );
    }
}
// Function to set field visibility based on payment method
function setFieldVisibilityBasedOnPaymentMethod(paymentMethod) {
    if (paymentMethod == 100000001) { // Check
        Xrm.Page.getControl("new checknumber").setVisible(true);
        Xrm.Page.getControl("new_cardlastfour").setVisible(false);
        Xrm.Page.getControl("new_transactionid").setVisible(false);
    } else if (paymentMethod == 100000002) { // Credit Card
        Xrm.Page.getControl("new checknumber").setVisible(false);
        Xrm.Page.getControl("new cardlastfour").setVisible(true);
        Xrm.Page.getControl("new_transactionid").setVisible(true);
    } else if (paymentMethod == 100000003 || paymentMethod == 100000004) { // Bank Transfer or
        Xrm.Page.getControl("new checknumber").setVisible(false);
        Xrm.Page.getControl("new_cardlastfour").setVisible(false);
        Xrm.Page.getControl("new_transactionid").setVisible(true);
```

```
} else { // Cash or null
        Xrm.Page.getControl("new_checknumber").setVisible(false);
        Xrm.Page.getControl("new_cardlastfour").setVisible(false);
        Xrm.Page.getControl("new_transactionid").setVisible(false);
    }
}
// Function to generate receipt number
function generateReceiptNumber() {
    var today = new Date();
    var year = today.getFullYear().toString().substr(-2);
    var month = (today.getMonth() + 1).toString().padStart(2, '0');
    var day = today.getDate().toString().padStart(2, '0');
    var hours = today.getHours().toString().padStart(2, '0');
    var minutes = today.getMinutes().toString().padStart(2, '0');
    var seconds = today.getSeconds().toString().padStart(2, '0');
    var receiptNumber = "RCT-" + year + month + day + "-" + hours + minutes + seconds;
    Xrm.Page.getAttribute("new_receiptnumber").setValue(receiptNumber);
}
```

**Server-Side Plugins** 

**Attendance Notification Plugin** 

```
using System;
using System.ServiceModel;
using Microsoft.Xrm.Sdk;
using Microsoft.Xrm.Sdk.Query;
public class AttendanceNotificationPlugin : IPlugin
    public void Execute(IServiceProvider serviceProvider)
    {
        // Extract the tracing service for use in debugging
        ITracingService tracingService = (ITracingService)serviceProvider.GetService(typeof(ITr
        // Extract the execution context
        IPluginExecutionContext context = (IPluginExecutionContext)serviceProvider.GetService(t
        // Check if the plugin is running in the correct context
        if (context.InputParameters.Contains("Target") && context.InputParameters["Target"] is
        {
            Entity attendanceRecord = (Entity)context.InputParameters["Target"];
           // Check if this is a create or update of attendance record
            if (context.MessageName.Equals("Create") || context.MessageName.Equals("Update"))
            {
               // Only process if this is an attendance record and status is absent
               if (attendanceRecord.LogicalName == "new attendance" &&
                    attendanceRecord.Contains("new_status") &&
                    attendanceRecord["new_status"].ToString() == "100000001") // Absent status
                {
                    try
                    {
                        // Get organization service
                        IOrganizationServiceFactory serviceFactory = (IOrganizationServiceFactc
                        IOrganizationService service = serviceFactory.CreateOrganizationService
                        // Get student information
                        if (attendanceRecord.Contains("new_studentid"))
                        {
                            EntityReference studentRef = (EntityReference)attendanceRecord["new
                            Entity student = service.Retrieve(studentRef.LogicalName, studentRe
                            if (student != null && student.Contains("new_parentguardianemail"))
                                string studentName = student["new_firstname"] + " " + student["
                                string parentEmail = student["new_parentguardianemail"].ToStrin
                                // Get date of absence
                                DateTime absenceDate = (DateTime)attendanceRecord["new date"];
                                // Create email notification (this would connect to email servi
                                Entity email = new Entity("email");
                                email["subject"] = "Absence Notification - " + studentName;
                                email["description"] = "This is to inform you that " + student\"
                                email["to"] = parentEmail;
```

```
email["from"] = "schoolsystem@example.org";
                                 // Here you would connect this to your email service
                                 // For demo purposes, we're just logging that an email would be
                                 tracingService.Trace("Absence notification would be sent to " +
                            }
                         }
                    }
                    catch (Exception ex)
                    {
                         tracingService.Trace("AttendanceNotificationPlugin: " + ex.ToString());
                         throw\ new\ \textbf{InvalidPluginExecutionException("An error occurred in the Att}
                    }
                }
            }
        }
    }
}
```

Fee Due Reminder Plugin

```
using System;
using System.ServiceModel;
using Microsoft.Xrm.Sdk;
using Microsoft.Xrm.Sdk.Query;
public class FeeDueReminderPlugin : IPlugin
    public void Execute(IServiceProvider serviceProvider)
    {
        // Extract the tracing service for use in debugging
        ITracingService tracingService = (ITracingService)serviceProvider.GetService(typeof(ITr
        // Extract the execution context
        IPluginExecutionContext context = (IPluginExecutionContext)serviceProvider.GetService(t
        // Get organization service
        IOrganizationServiceFactory serviceFactory = (IOrganizationServiceFactory)serviceProvid
        IOrganizationService service = serviceFactory.CreateOrganizationService(context.UserId)
        try
        {
           // This plugin is designed to run on a scheduled basis (daily)
           // Find all active fees that are due in 7 days
            DateTime targetDate = DateTime.Today.AddDays(7);
            QueryExpression query = new QueryExpression("new_fee");
            query.ColumnSet = new ColumnSet("new_feename", "new_amount", "new_duedate", "new_cl
           // Filter for active fees due in 7 days
            FilterExpression filter = query.Criteria.AddFilter(LogicalOperator.And);
            filter.AddCondition("new status", ConditionOperator.Equal, 100000000); // Active st
            filter.AddCondition("new_duedate", ConditionOperator.On, targetDate);
            EntityCollection fees = service.RetrieveMultiple(query);
            foreach (Entity fee in fees.Entities)
            {
                // Get class information to find students
                if (fee.Contains("new_classid"))
                {
                    EntityReference classRef = (EntityReference)fee["new_classid"];
                    // Find all students in this class
                    QueryExpression studentQuery = new QueryExpression("new_student");
                    studentQuery.ColumnSet = new ColumnSet("new firstname", "new lastname", "ne
                    FilterExpression studentFilter = studentQuery.Criteria.AddFilter(LogicalOpe
                    studentFilter.AddCondition("new classid", ConditionOperator.Equal, classRef
                    studentFilter.AddCondition("new_status", ConditionOperator.Equal, 1000000000
                    EntityCollection students = service.RetrieveMultiple(studentQuery);
                    foreach (Entity student in students.Entities)
```

```
{
                        if (student.Contains("new_parentguardianemail"))
                            string studentName = student["new_firstname"] + " " + student["new_
                            string parentEmail = student["new_parentguardianemail"].ToString();
                            string feeName = fee["new_feename"].ToString();
                            decimal amount = (decimal)fee["new_amount"];
                            DateTime dueDate = (DateTime)fee["new_duedate"];
                            // Create email notification (this would connect to email service)
                            Entity email = new Entity("email");
                            email["subject"] = "Fee Payment Reminder - " + feeName;
                            email["description"] = "This is a reminder that " + feeName + " pay
                                                  " for " + studentName + " is due on " + dueDa
                            email["to"] = parentEmail;
                            email["from"] = "finance@schoolexample.org";
                            // Here you would connect this to your email service
                            tracingService.Trace("Fee reminder would be sent to " + parentEmail
                        }
                    }
                }
            }
        }
        catch (Exception ex)
        {
            tracingService.Trace("FeeDueReminderPlugin: " + ex.ToString());
            throw new InvalidPluginExecutionException("An error occurred in the FeeDueReminderF
        }
    }
}
```

**Class Capacity Check Plugin** 

```
using System;
using System.ServiceModel;
using Microsoft.Xrm.Sdk;
using Microsoft.Xrm.Sdk.Query;
public class ClassCapacityCheckPlugin : IPlugin
    public void Execute(IServiceProvider serviceProvider)
    {
        // Extract the tracing service for use in debugging
        ITracingService tracingService = (ITracingService)serviceProvider.GetService(typeof(ITr
        // Extract the execution context
        IPluginExecutionContext context = (IPluginExecutionContext)serviceProvider.GetService(t
        // Check if the plugin is running in the correct context
        if (context.InputParameters.Contains("Target") && context.InputParameters["Target"] is
        {
            Entity enrollment = (Entity)context.InputParameters["Target"];
           // Only execute for enrollment entity on create
            if (context.MessageName.Equals("Create") && enrollment.LogicalName == "new enrollme
            {
                try
                {
                    // Get organization service
                    IOrganizationServiceFactory serviceFactory = (IOrganizationServiceFactory)s
                    IOrganizationService service = serviceFactory.CreateOrganizationService(con
                    // Get class information from enrollment
                    if (enrollment.Contains("new classid"))
                    {
                        EntityReference classRef = (EntityReference)enrollment["new_classid"];
                        Entity classEntity = service.Retrieve(classRef.LogicalName, classRef.Id
                        if (classEntity != null)
                        {
                            int maxCapacity = (int)classEntity["new_maxcapacity"];
                            int currentCount = (int)classEntity["new_currentstudentcount"];
                            string className = classEntity["new_classname"].ToString();
                            // Check if class is already at capacity
                            if (currentCount >= maxCapacity)
                                throw new InvalidPluginExecutionException("Cannot enroll studen
                            }
                            // Check if enrollment would bring class to 90% capacity or more
                            if ((currentCount + 1) >= (maxCapacity * 0.9))
                            {
                                // Update class count
                                classEntity["new_currentstudentcount"] = currentCount + 1;
                                service.Update(classEntity);
```

```
// Create notification for administrators
                                Entity notification = new Entity("new_communication");
                                notification["new_title"] = "Class Capacity Alert - " + classNa
                                notification["new_content"] = "Class " + className + " has reac
                                                            "% of its maximum capacity (" + (cu
                                notification["new_category"] = new OptionSetValue(100000000); /
                                notification["new_audience"] = new OptionSetValue(100000000); /
                                notification["new_startdate"] = DateTime.Today;
                                notification["new status"] = new OptionSetValue(100000001); //
                                service.Create(notification);
                                tracingService.Trace("Class capacity alert created for " + clas
                            }
                            else
                            {
                                // Just update the class count
                                classEntity["new_currentstudentcount"] = currentCount + 1;
                                service.Update(classEntity);
                            }
                        }
                    }
                }
                catch (Exception ex)
                {
                    tracingService.Trace("ClassCapacityCheckPlugin: " + ex.ToString());
                    throw new InvalidPluginExecutionException("An error occurred in the ClassCa
                }
            }
        }
    }
}
```

**Automatic Grade Calculation Plugin** 

```
using System;
using System.ServiceModel;
using System.Collections.Generic;
using System.Linq;
using Microsoft.Xrm.Sdk;
using Microsoft.Xrm.Sdk.Query;
public class AutoGradeCalculationPlugin : IPlugin
{
    public void Execute(IServiceProvider serviceProvider)
    {
       // Extract the tracing service for use in debugging
        ITracingService tracingService = (ITracingService)serviceProvider.GetService(typeof(ITr
       // Extract the execution context
        IPluginExecutionContext context = (IPluginExecutionContext)serviceProvider.GetService(t
       // Check if the plugin is running in the correct context
        if (context.InputParameters.Contains("Target") && context.InputParameters["Target"] is
            Entity assessment = (Entity)context.InputParameters["Target"];
           // Execute for assessment entity on create or update
            if ((context.MessageName.Equals("Create") || context.MessageName.Equals("Update"))
                assessment.LogicalName == "new assessment")
            {
                // Only proceed if we have scored points and max score
                if (assessment.Contains("new scoredpoints") && assessment.Contains("new maxscor
                {
                    try
                    {
                        // Get organization service
                        IOrganizationServiceFactory serviceFactory = (IOrganizationServiceFactc
                        IOrganizationService service = serviceFactory.CreateOrganizationService
                        decimal scoredPoints = (decimal)assessment["new_scoredpoints"];
                        decimal maxScore = (decimal)assessment["new_maxscore"];
                        // Calculate percentage
                        if (maxScore > 0)
                        {
                            decimal percentage = (scoredPoints / maxScore) * 100;
                            assessment["new_percentage"] = percentage;
                            // Determine grade based on percentage
                            int gradeValue;
                            if (percentage >= 97) gradeValue = 100000000; // A+
                            else if (percentage >= 93) gradeValue = 100000001; // A
                            else if (percentage >= 90) gradeValue = 100000002; // A-
                            else if (percentage >= 87) gradeValue = 100000003; // B+
                            else if (percentage >= 83) gradeValue = 100000004; // B
                            else if (percentage >= 80) gradeValue = 100000005; // B-
```

```
else if (percentage >= 77) gradeValue = 100000006; // C+
else if (percentage >= 73) gradeValue = 100000007; // C
else if (percentage >= 70) gradeValue = 100000008; // C-
else if (percentage >= 67) gradeValue = 100000009; // D+
else if (percentage >= 60) gradeValue = 100000010; // D
else gradeValue = 100000011; // F
assessment["new grade"] = new OptionSetValue(gradeValue);
// If this is an update operation, we need to update the entity
if (context.MessageName.Equals("Update"))
{
    // Create an update request for just these fields
    Entity updateAssessment = new Entity(assessment.LogicalName);
    updateAssessment.Id = assessment.Id;
    updateAssessment["new_percentage"] = percentage;
    updateAssessment["new_grade"] = new OptionSetValue(gradeValue);
    service.Update(updateAssessment);
    tracingService.Trace("Updated assessment with calculated grade
}
// If status is "Graded", check if we should notify student/parent
if (assessment.Contains("new_status") && assessment["new_status"] i
{
    OptionSetValue status = (OptionSetValue)assessment["new_status"
   if (status. Value == 100000002) // Graded status
    {
       // Get student information
       if (assessment.Contains("new studentid") && assessment.Cont
        {
            EntityReference studentRef = (EntityReference)assessmen
            EntityReference courseRef = (EntityReference)assessment
            Entity student = service.Retrieve(studentRef.LogicalNam
            Entity course = service.Retrieve(courseRef.LogicalName,
            if (student != null && student.Contains("new parentguar
            {
                string studentName = student["new_firstname"] + " "
                string parentEmail = student["new parentguardianema
                string courseName = course["new_coursename"].ToStri
                string assessmentType = "";
                if (assessment.Contains("new assessmenttype") && as
                {
                    OptionSetValue assessTypeOption = (OptionSetVal
                    switch (assessTypeOption.Value)
                    {
                        case 100000000: assessmentType = "Quiz"; br
                        case 100000001: assessmentType = "Test"; br
                        case 100000002: assessmentType = "Exam"; br
                        case 100000003: assessmentType = "Assignmen
                        case 100000004: assessmentType = "Project";
```

```
default: assessmentType = "Assessment"; bre
                                             }
                                        }
                                         // Here you would connect to your email service to
                                         tracingService.Trace("Assessment result notificatic
                                                             " for student " + studentName +
                                                             GetGradeText(gradeValue) + " ("
                                    }
                                }
                            }
                        }
                    }
                }
                catch (Exception ex)
                    tracingService.Trace("AutoGradeCalculationPlugin: " + ex.ToString());
                    throw new InvalidPluginExecutionException("An error occurred in the Aut
                }
            }
       }
    }
}
private string GetGradeText(int gradeValue)
    switch (gradeValue)
        case 100000000: return "A+";
        case 100000001: return "A";
        case 100000002: return "A-";
        case 100000003: return "B+";
        case 100000004: return "B";
        case 100000005: return "B-";
        case 100000006: return "C+";
        case 100000007: return "C";
        case 100000008: return "C-";
        case 100000009: return "D+";
        case 100000010: return "D";
        case 100000011: return "F";
        default: return "Unknown";
    }
}
```

### **Power Automate Flows**

}

**Student Registration Flow** 

Trigger: When a new Student record is created Actions:

- 1. Get Student record details
- 2. Create a Dataverse record in the User entity for the student
  - Set username as student email
  - Set appropriate security role
- 3. Send welcome email to parent/guardian
  - Include student information
  - Include login credentials for parent portal
  - Attach school handbook/policies
- 4. Create a task for the class teacher to welcome the new student
- 5. Update student record status to "Active"

### **Report Card Generation Flow**

Trigger: Manual trigger with inputs (Class, Academic Year, Term) Actions:

- 1. Get all students in the specified class
- 2. For each student:
  - a. Get all assessments for the student in the term
  - b. Calculate average grade per course
  - c. Generate PDF report card using template
    - Include student details
    - Include course grades
    - Include attendance summary
    - Include teacher comments
  - d. Save PDF to SharePoint document library
  - e. Send email to parent with report card attached
- 3. Create summary record of report cards generated

#### **End of Year Promotion Flow**

Trigger: Scheduled - End of academic year Actions:

- 1. Get all active classes
- 2. For each class:
  - a. Get all active students
  - b. For each student:
    - i. Check if student meets promotion criteria
      - Attendance > 80%
      - Overall grade > 60%
    - ii. If criteria met:
      - Create new enrollment for next grade
      - Update student status
    - iii. If criteria not met:
      - Flag for review
      - Create notification for admin
- 3. Generate promotion summary report

# 10. Advanced Power Apps Components

**Canvas App Components** 

**Student Check-In Application** 

javascript

```
// OnStart event
Clear(ColAttendanceToday);
Set(CurrentDate, Today());
Set(CurrentUser, User());
// Check if current user is a teacher
ClearCollect(
    CurrentTeacher,
    Filter(
        Teachers,
        Email = CurrentUser.Email
    )
);
// If user is a teacher, load their classes
If(
    !IsEmpty(CurrentTeacher),
    ClearCollect(
        TeacherClasses,
        Filter(
            Classes,
            ClassTeacher = First(CurrentTeacher).TeacherId
    )
);
// Attendance Marking Function
Set(MarkAttendance, function(studentId, status, notes){
    Patch(
        Attendance,
        Defaults(Attendance),
            Student: studentId,
            Class: dropdown_Classes.Selected.Value,
            Date: CurrentDate,
            Status: status,
            Notes: notes,
            RecordedBy: First(CurrentTeacher).TeacherId,
            RecordingTime: Now()
        }
    );
    // Update the collection to reflect the new record
    Collect(
        ColAttendanceToday,
        {
            Student: studentId,
            Status: status,
            Notes: notes
        }
    );
});
```

**Assessment Entry Application** 

javascript

```
// OnStart event
Clear(ColAssessments);
// Get available courses taught by the current teacher
Set(CurrentUser, User());
ClearCollect(
    CurrentTeacher,
    Filter(
        Teachers,
        Email = CurrentUser.Email
    )
);
If(
    !IsEmpty(CurrentTeacher),
    ClearCollect(
        TeacherCourses,
        Filter(
            Courses,
            PrimaryTeacher = First(CurrentTeacher).TeacherId
        )
    )
);
// Function to calculate grade based on percentage
Set(CalculateGrade, function(scoredPoints, maxScore){
    Set(percentage, (scoredPoints / maxScore) * 100);
    If(percentage >= 97, "A+",
    If(percentage >= 93, "A",
    If(percentage >= 90, "A-",
    If(percentage >= 87, "B+",
    If(percentage >= 83, "B",
    If(percentage >= 80, "B-",
    If(percentage >= 77, "C+",
    If(percentage >= 73, "C",
    If(percentage >= 70, "C-",
    If(percentage >= 67, "D+",
    If(percentage >= 60, "D",
    "F"))))))))));
});
// Create Assessment Function
Set(SaveAssessment, function(studentId, courseId, assessmentType, maxScore, scoredPoints, comme
    Set(calculatedPercentage, (scoredPoints / maxScore) * 100);
    Set(calculatedGrade, CalculateGrade(scoredPoints, maxScore));
    Patch(
        Assessments,
        Defaults(Assessments),
            Student: studentId,
            Course: courseId,
```

```
AssessmentType: assessmentType,
    AssessmentDate: Today(),
    MaxScore: maxScore,
    ScoredPoints: scoredPoints,
    Percentage: calculatedPercentage,
    Grade: calculatedGrade,
    Comments: comments,
    Teacher: First(CurrentTeacher).TeacherId,
    Status: "Graded"
    }
);
});
```

**Fee Management Application** 

javascript

```
// OnStart event
Clear(ColPayments);
Clear(ColPendingFees);
// Function to generate receipt number
Set(GenerateReceiptNumber, function(){
    Concatenate(
        "RCT-",
        Text(Year(Now()), "00"),
        Text(Month(Now()), "00"),
        Text(Day(Now()), "00"),
        "-",
        Text(Hour(Now()), "00"),
        Text(Minute(Now()), "00"),
        Text(Second(Now()), "00")
    )
});
// Function to record payment
Set(RecordPayment, function(studentId, feeId, amountPaid, paymentMethod, transactionId){
    Set(receiptNumber, GenerateReceiptNumber());
    Patch(
        Payments,
        Defaults(Payments),
        {
            Student: studentId,
            Fee: feeId,
            PaymentDate: Today(),
            AmountPaid: amountPaid,
            PaymentMethod: paymentMethod,
            TransactionID: transactionId,
            ReceiptNumber: receiptNumber,
            Status: "Completed",
            ProcessedBy: User().FullName
        }
    );
    // Generate PDF receipt for printing
    // This would typically call a Power Automate flow to generate the PDF
    // Update the pending fees collection
    ClearCollect(
        ColPendingFees,
        Filter(
            ColPendingFees,
            FeeId <> feeId
        )
    );
});
// Function to load student fees
Set(LoadStudentFees, function(studentId){
```

```
ClearCollect(
        ColStudentInfo,
        Filter(
            Students,
            StudentId = studentId
        )
    );
    ClearCollect(
        ColPendingFees,
        Filter(
            Fees,
            Class = First(ColStudentInfo).Class,
            Status = "Active",
            Not(
                Fee.FeeId in Filter(
                    Payments,
                    Student = studentId,
                    Status = "Completed"
                ).Fee
            )
        )
    );
    ClearCollect(
        ColPaymentHistory,
        Filter(
            Payments,
            Student = studentId
        )
    );
});
```

## 11. Testing and Deployment Plan

# **Testing Strategy**

### **Unit Testing**

### 1. Entity Testing

- Verify each entity can be created with required fields
- Test field validations and business rules
- Verify entity relationships work correctly

### 2. Form Testing

- Test each form for proper display of fields
- Verify conditional visibility rules
- Test form navigation and tab functionality
- Verify calculated fields update correctly

### 3. Plugin Testing

• Test each plugin with valid inputs

- Test error handling with invalid inputs
- Verify transaction rollback on failure

#### 4. JavaScript Testing

- Test client-side scripts in isolation
- Verify field calculations
- Test conditional visibility logic

#### **Integration Testing**

### 1. Process Flow Testing

- Test complete business process flows from start to finish
- Verify entities update correctly at each stage
- Test transitions between stages

#### 2. Workflow Testing

- Test complete workflow execution
- Verify email notifications are sent correctly
- Test conditional branches in workflows

### 3. Dashboard Testing

- Verify charts display correct data
- Test dashboard filters
- Verify refresh functionality

### **User Acceptance Testing**

### 1. Role-Based Testing

- Test system as different user roles
- Verify security permissions work correctly
- Test form access based on security roles

### 2. Scenario-Based Testing

- Test complete end-to-end scenarios
  - Student admission process
  - Course enrollment
  - Fee payment
  - Assessment grading
  - Report card generation

### 3. Performance Testing

- Test system with realistic data volumes
- Verify response times meet requirements
- Test concurrent user access

### **Deployment Plan**

#### 1. Environment Setup

- Create Development environment
- Create Test/QA environment
- Create Production environment
- Configure security and access controls

### 2. Development Deployment

- Deploy solution components to Development environment
- Configure system settings
- Create initial test data
- · Perform initial unit testing

### 3. Test/QA Deployment

- Deploy validated solution to Test/QA environment
- Import realistic test data
- Perform integration testing
- Conduct user acceptance testing
- · Document and fix identified issues

### 4. Production Preparation

- Finalize deployment checklist
- Prepare data migration scripts
- · Create user training materials
- Schedule deployment window
- Plan go-live support strategy

### 5. Production Deployment

- Deploy solution to Production environment
- · Migrate initial data
- · Validate critical functionality
- Activate user accounts

### 6. Post-Deployment Activities

- Provide user training
- Monitor system performance
- Address any production issues
- · Collect user feedback
- Plan for future enhancements

# 12. Key Implementation Challenges and Solutions

### **Data Migration**

Challenge: Moving existing student data from legacy systems. Solution:

- Create data mapping templates
- Use Power Platform dataflows for ETL processes
- Implement validation rules to ensure data quality
- Perform staged migration (historical data last)

### **User Adoption**

Challenge: Ensuring staff adapt to the new system. Solution:

- Involve key stakeholders during development
- Provide comprehensive training materials
- Create quick reference guides
- Designate super-users in each department
- Establish a feedback mechanism

### **Performance Optimization**

Challenge: Maintaining system performance with large data volumes. Solution:

- Implement efficient data model
- Create appropriate indexes
- Optimize plugin code
- Implement data archiving strategy
- Set up performance monitoring

### **Security and Compliance**

Challenge: Ensuring student data privacy and regulatory compliance. Solution:

- Implement role-based security model
- Enable field-level security for sensitive data
- Create audit trails for critical operations
- Implement data retention policies
- Regular security reviews

### 13. Future Enhancement Roadmap

### Phase 1 Enhancements (3-6 months post-launch)

- Mobile app for students and parents
- Integration with learning management systems
- Enhanced reporting capabilities
- Attendance tracking with biometric options

### Phase 2 Enhancements (6-12 months post-launch)

- Alumni management module
- · Advanced analytics dashboard
- Resource scheduling module
- Integration with accounting systems

### Phase 3 Enhancements (12+ months post-launch)

- Al-powered student performance prediction
- Curriculum planning module
- School transportation management
- Automated timetable generation

### 14. Conclusion

This comprehensive school management system leverages the power of Microsoft Power Platform to create a robust, scalable solution that addresses all aspects of school administration. By following this implementation roadmap, you will be able to create a system that streamlines administrative tasks, improves communication between stakeholders, and provides valuable insights into school operations.

The modular design allows for phased implementation and future enhancements, ensuring the system can grow and adapt to changing requirements. The focus on user experience and role-based access ensures high adoption rates and system utility for all stakeholders, from administrators and teachers to students and parents.