

Organizor



Abstract : To optimize ORGANIZOR by making the current application to follow a standard, in order to simplify, automate, refine and improvise the operations of all the USERS of the CRM, thereby increasing the productivity and sales of the organization.

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Revision History

Name	Date	Reason For Changes	Version
Senthil	Aug 29, 2012	Initial Draft	0.1
Vijay	Sep 05, 2012	Review Comments	0.2
Senthil	Sep 06, 2012	Review Comments Incorporation	0.3

1. Document Scope

This document focuses primarily on discussions held between TEAM ALPHA and IEC Abroad to bring out new,

a. Enhancements

b. Defects

for improvising the functionality and operations of ORGANIZOR.

2. Document Conventions

- Font-face : Calibri
- Font-size : 12
- Employee = Staff
- Students = Candidates
- Organizor = CRM = Current System = Current Application

3. Enhancements

a) Roles, Users, Operations and Sessions

Currently, there are 8 roles,

- User
- Branch User
- Branch Manager
- Head Office Staff
- Head Office Supervisor
- Head Office Manager
- Head Office Super Admin
- Administrator

Problem Statement:

- a. Roles are static, their permissions cannot be altered
- b. Administrator cannot create new roles
- c. Administrator cannot customize the permissions of the roles
- d. Operations done by the users are not clearly defined

Proposed Solution:

Team Alpha greatly recommends RBAC(Role Based Access Control) model to be implemented for organizor.

A new module should be integrated with the current organizor which implements the RBAC architecture into the existing way of USER interaction with the current application.

Please follow this link to know more about the power of RBAC,

http://en.wikipedia.org/wiki/Role-based_access_control

b) Follow-ups

Presently, the follow-up system in organizor is not functional.

Problem Statement:

A fully functional follow-up system is required. In simple terms,

“Every employee should be provided with a list of follow-up line items each day based on his past activities”

“Every student has to be updated via email on a real time basis about the status change of the student in organizor”

Proposed Solution:

A whole new FOLLOW-UP module should be integrated with the current organizor making the employees and the students to be the main participants.

c) Finance Module

Currently, finance module is not functional.

Problem Statement:

It should say how much we received date wise and payment should reflect as per chosen options on the statistical report, for example University wise, language wise, overall pending and overall

Finance module has to be in a different page and have below option for university and language school separate

NOTE: It should be available for every student

Example tables are provided as follows,

Generic table:

Tuition fees	Comm %	Amount	Comm Paid	Date Recieved	Comm Remaining	Commission Status
						Fully Paid
						Partially Paid
						Pending

Example 1 – Full payment:

Tuition fees	Comm %	Amount	Comm Paid	Date Recieved	Comm Remaining	Commission Status
£10,000	10%	£1,000	£1,000	12-09-2010	NIL	Fully Paid

Example 2 – Partial payments:

Tuition fees	Comm %	Amount	Comm Paid	Date Recieved	Comm Remaining	Commission Status
£10,000	10%	£1,000	£500	12-09-2010	£500	Partially Paid

NOTE: In the above example, only £500 received so it should have provision to add payments in future like below

Example 2 – Partial payments extended:

Tuition fees	Comm %	Amount	Comm Paid	Date Recieved	Comm Remaining	Commission Status
£10,000	10%	£1,000	£500	12-09-2010	£500	Partially Paid
			£200	15-10-10	£300	Partially Paid

Example 2 – Partial payments extended:

Tuition fees	Comm %	Amount	Comm Paid	Date Recieved	Comm Remaining	Commission Status
£10,000	10%	£1,000	£500	12-09-2010	£500	Partially Paid
			£200	15-10-10	£300	Partially Paid
			£300	16-11-10	0.00	Fully Paid

Example 3 – No payment(Pending):

Tuition fees	Comm %	Amount	Comm Paid	Date Recieved	Comm Remaining	Commission Status
£10,000	10%	£1,000				Pending

Proposed Solution:

A new finance module has to be designed and integrated where every payment corresponds to every student and a whole new finance section which is very intelligent in generating reports based on every single attribute of the student such as date range, university, language school, location of the student, location of the university, location of IEC Abroad employee.

d) Sub-Agents

Sub-agents in Organizer can be defined as a person, organization or an event that generates lead(students) to IEC abroad.

Problem Statement:

Currently, the sub-agents are functional but it does not achieve any purpose.

- The sub-agents do not have any profile.
- Sub-agents do not have access to organizer, no login name and password.
- Sub-agents can be anyone.
- Sub-agents details are name and email only.
- Three types of sub-agents are required as below,
 1. Any 3rd party/individual working for IEC abroad to bring students for enquiry.
 2. A government.
 3. A company such as StudyGroup.
- A separate access/role has to be defined for every kind of sub-agents as mentioned above.
- As mentioned in the section 3.1 of this document, the administrator of Organizer should have the permission to create a ROLE on the go.

Please refer the diagram below for creating ROLES,

Add a New User Account

Permission:		
<input checked="" type="checkbox"/> Accommodation Search		User can search for available accommodation
<input checked="" type="checkbox"/> Create Booking		User can create and save new student applications online
<input type="checkbox"/> Create User Account		User can create new user accounts for Agent staff
<input type="checkbox"/> Delete User Account		User can delete existing Agent staff user accounts
<input checked="" type="checkbox"/> Edit Booking		User can edit saved student applications that have not yet been submitted
<input type="checkbox"/> Modify User Account		User can modify existing Agent staff user accounts
<input checked="" type="checkbox"/> Submit Booking		User can submit saved student applications for processing
<input type="checkbox"/> View Agreements		User can view the Agency agreement with Study Group
<input type="checkbox"/> View Any Booking		User can view bookings that have been created by other users
<input type="checkbox"/> View Commissions		User can view booking commission details

First Name:
 Last Name:
 Email Address:
 Agent User Role:

Next Cancel

Payment Module to sub-agents

Before signing up any sub-agent in to Organizor the bank information of the sub-agent should be procured and an option for the IEC abroad to make a payment to the sub-agents from Organizor has to be created.

Proposed Solution:

A complete integration of user profile sign-up to all the types of sub-agents should be created and a payment module has to be integrated through an option for IEC abroad to make payments to the sub-agents should be provided.

e) Feedbacks – Comments –linked?

Feedbacks from the students adds a lot of value to the organization and it has to be handled in the right way.

Problem statement:

- The feedbacks given by a student is updated as a comment in the students comments section of the organizer.
- There is no one point of contact defined within the organizer which will be notified when a student sends a feedback to the organizer.

- The comments and feedbacks have a lot in common, if a proper tracking system that maintains this link between feedbacks and comments is in place then that would greatly enhance the value of the software thereby giving many opportunities to develop the organization.

Proposed solution:

- A comprehensive and thorough module that handles the link between FEEDBACKS and COMMENTS should be developed and integrated with the current system.
- A separate email facility that notifies all the participants about any activity in this module should be integrated, as well.

f) EXAMS

Currently, exams such as IELTS, TOEFL, GRE, GMAT are there in organizer.

Problem statement:

What if a new exam is established by the government.

How do we integrate a new exam to the current model.

The drop down scores should be text boxes.

Proposed solution:

An option to add new exams to the current model should be provided with organizer. At the same time, the dropdowns for scores should be removed and a text box should replace it.

g) Business Partners

Currently, organizer does not track the business partners of IEC abroad.

Problem statement:

- The **contract manager** at IEC Abroad had to maintain all the records about all the business partners manually.
- The business and **profile information** of the partners are not tracked anywhere in organizer.
- The **contract information** with the business partners are not stored in the current application.
- The **application form** is not uploaded and linked to anything .
- **Contact details** of the business partners and the point of contact at the partnered firm is not present anywhere.

- **The tenure of the contract** i.e. the start and end date of the contract with the partners are not stored.
- There is **no follow-up system** to track the status of the contract with the business partners.
- **Roles** that can create/read/update and delete business partners and contracts should be well-defined.

Proposed solution:

A whole new module for business partners should be designed and developed after carefully analyzing all the problem statements and roles that can operate on this module should be created.

h) Events

There are many events that are conducted by IEC Abroad to create awareness among the students and make them enroll with the organization.

Problem statement:

Currently, the leads generated by events are stored in the organizer under sub-agents.

No proper and exact details about events are stored in the organizer.

Proposed Solution:

A separate event module that tracks the events and offers an exclusive space for events to store all the details about the events without confusing with the sub-agents should be developed and integrated.

i) Employees ID/Profile – (Replaceable with a new employee)**Problem statement:**

- In the event of an employee at organizer leaving the organization the students/candidates assigned to that employee is left unassigned in the current application.
- A large amount of manual work has to be done in order to assign every candidate to the new employee.
- There is no one place in the current software to store, track and maintain the information of employees in the software.

Proposed solution:

- A whole new module that enables an employee to be signed up with the organizer with all the profile information should be integrated.

- In event of an employee leaving the organization the new employee should receive the old employees ID so that everything that was assigned to the old employee would now be allotted to the new employee.

j) Logs

Problem statement:

Currently, all activities performed by the users of the organizer are not logged anywhere.

There is no one logging system that takes care of storing all the operations in a log report, so that in future it acts as a reference point.

Proposed solution:

A thorough study has to be made to identify and recognize the operations that takes place in the organizer and those operations has to be taken in to consideration and a monitoring system that writes a log when those operations are performed by the users in to the database should be designed and implemented.

4. Defects

a) Country of Study/Origin

The country of origin should display all the countries.

The list of countries to study should be in total control of the administrator, so that he can add/remove any of countries as required.

b) Passwords - Students

When a new student is created in the application, an email is sent to the student that has the login information/ password and a link that activates the students profile at Organizor. By chance, if the student deletes the email thinking it as a spam or anything, the student loses the password. There is no system in Organizor to regenerate the password and send it back to the students.

A password resend module that handles all scenarios has to be integrated.

c) UNIVERSITIES/LANGUAGE CENTERS – start/end dates

The start dates and end dates when choosing the universities and language centers is not persistent while updating the student information.

A proper date tracking system that is consistent across all the places in the application has to be developed and implemented.

d) Status of the application to an university

The following are the statuses,

- Sent to University/Language school
- Offered
- Conditional
- Joined
- Unconditional
- Pending
- Rejected
- Defer

- Dead
- Sent to Nasir/Rafi
- Student confirmed acceptance
- Sent to iec.abroad

The above mentioned statuses will be corresponded to a student at an instant. In other words, every applicant/student will have a life on organizer with a status assigned to them.

This status assigned to the student should always be persistent and there are few scenarios where the status is lost. This has to be fixed.

e) Previous Study in all Countries

Organizor doesn't keep track of the information about the previous history of the students.

For instance, if a student has studied in the UK previously in his/her lifetime and applying to study in the UK again via IEC Abroad, the need to procure, store and track that information is critical.

Currently, the information about the previous study in any country is not stored and tracked. It has to be implemented.

f) Passwords – Users

Passwords are critical and top secret information. To maintain them in the event of any user forgetting it and to give the user the freedom to set any password of their choice with a security and sense embedded into it is very important.

Organizor do not have an option for the users to change/reset/retrieve password and every time the administrator of the application has to do all the maintenance work. This has to be changed and the user has to be given the rights to maintain their accounts.

g) Branches

The branches in organizer do not have any information about the branch. There will be many information about a branch and all those information has to be properly fed in to the software before creating a branch and then the branch has to come in the play.

h) Adding universities and language centers – restricted access?

The rights to add universities and language centers should be given to the administrator or to anyone the administrator wants to give. Not all should be able to add a university or a language center into organizer.

i) Countries - Consistency across Organizor and IEC Abroad website

Currently, the list of countries displayed in organizor and the IEC abroad website vary so much and this is because the countries in both places are picked up from the database in different tables, this is not a standard and this has to be fixed by moving countries to one place and to display countries it has to be retrieved from that one place.

Thanks,

Senthil, Client Manager.

Team alpha.

