TeBS

Business Requirements Specification Document

(Extended Requirements of

Short Courses Course Registration)

Microsoft Dynamics CRM 2016 – On-Premises Implementation

FOR

NTU

College of Professional and Continuing Education

NANYANG TECHNOLOGICAL UNIVERSITY SINGAPORE | College of Professional and Continuing Education

Prepared for	NTU – CoPACE
Project	Microsoft CRM3.0 Upgrade to Dynamics CRM2016
Prepared by	Senthil
Business owner	CoPACE (Sales and Operation Team)

Document Version

Version	Date	Author	Comment/ Changes from Prior Version
0.1	17 Sep 2018	Senthil	Initial draft
0.2	21 Sep 2018	Senthil	Revised workflow
0.3	27 Sep 2018	Senthil	Amended SIP and eLearning scope after email correspondence with Lee Hoon on 22nd 23rd Sep
0.4	29 Sep 2018	Senthil	Amended after SIP field list and requirement email from Kat on 27th Sep
0.5	05 Oct 2018	Senthil	After meeting with DL user on 1st Oct and received revised field list matrix on 5th Oct.
0.6	16 Oct 2018	Senthil	Amended DL workflow based on Lily's 15th Oct email. Amended SIP workflow after phone conversation (on 16th Oct) by Chang Hsien and Patrick with Lee Hoon and Kathrine.
0.7	18 Oct 2018	Senthil	Amended workflow based on 18th Oct meeting.

Review & Acceptance

Date	Reviewed & Accepted by	Signature
18/10/18	Tan Soon Meng CoPACE NTU	
18/10/18	Tan Lee Hoon CoPACE NTU	

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The Objective

The objective is to create Course Registration and Course Acceptance page for short courses. These pages will be developed to meet web responsive, so the users can access these pages from any devices and register easily. The user-friendly controls will be incorporated to make the registration form filling easier for users.

Requirement Overview

- The following 3 different types of forms will be created.
  - Short Courses (SC)
  - Student Immersion Programme (SIP)
  - Distance Learning (DL)
- In order to capture the leads quickly, we propose to capture basic information of participant in first iteration of registration.
- The overview of process flow shown below.
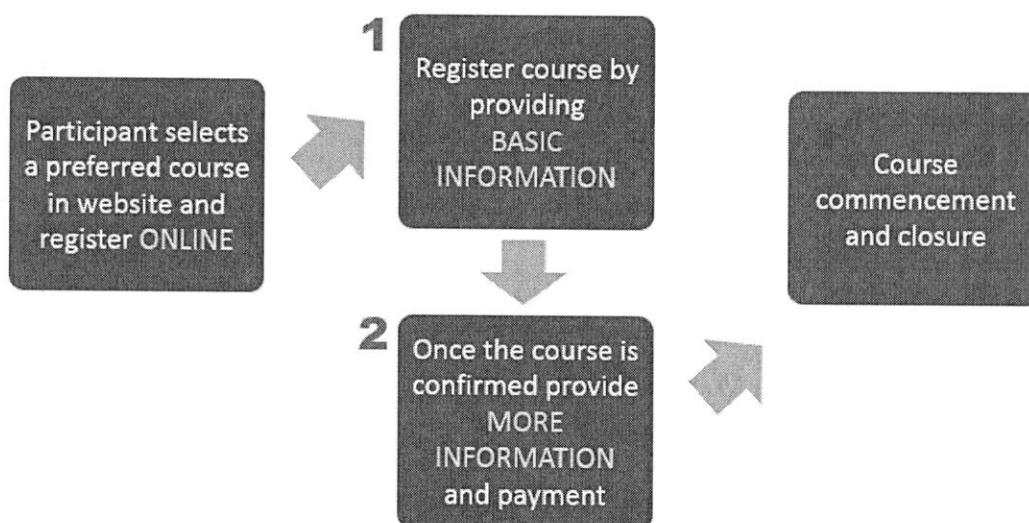
- Once the course has confirmed, the participant should provide more information and subsequent action such payment. This approach is applicable for Short Courses only. The Student Immersion Programme and Distance Learning registration doesn't need this approach due to there is no course confirmation process in it.
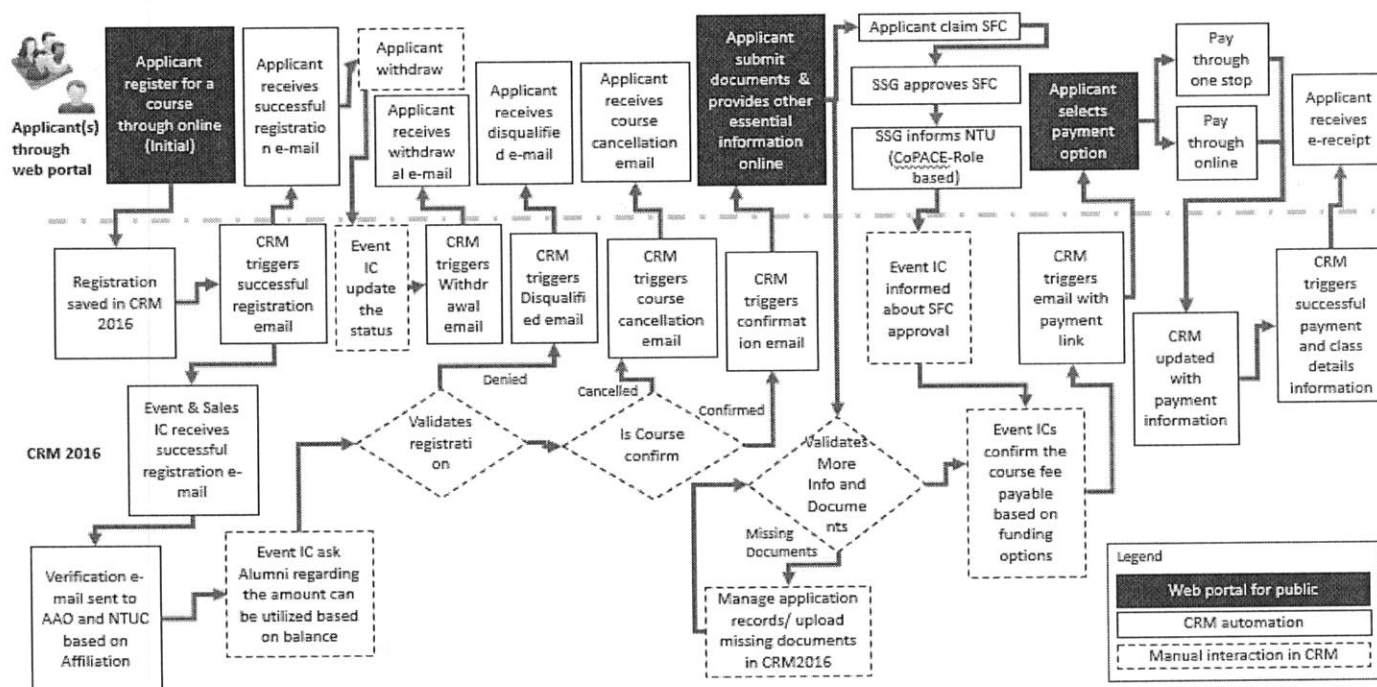
- The following are the types of registration forms.
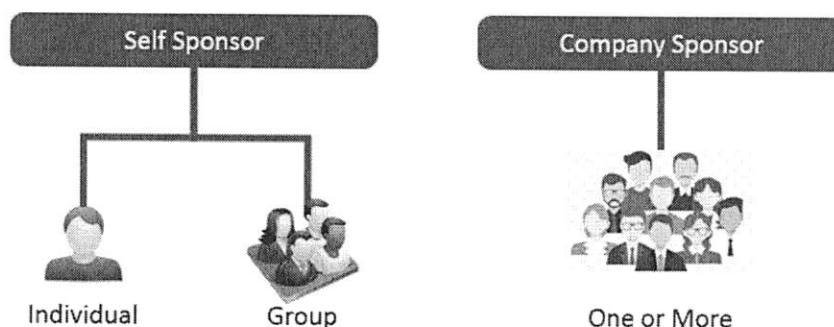
- The detailed registration processes explained in the following sections.

Workflow

The following workflow defines the processes of registering for a Short Course which has funding and SkillsFuture Credit option.

**SC Registration workflow – Self Sponsor – Individual & Group – With Funding and SFC option**

The following workflow defines the processes of registering for a Short Course through company sponsor with funding options.

SC Registration workflow – Company Sponsor – With Funding option
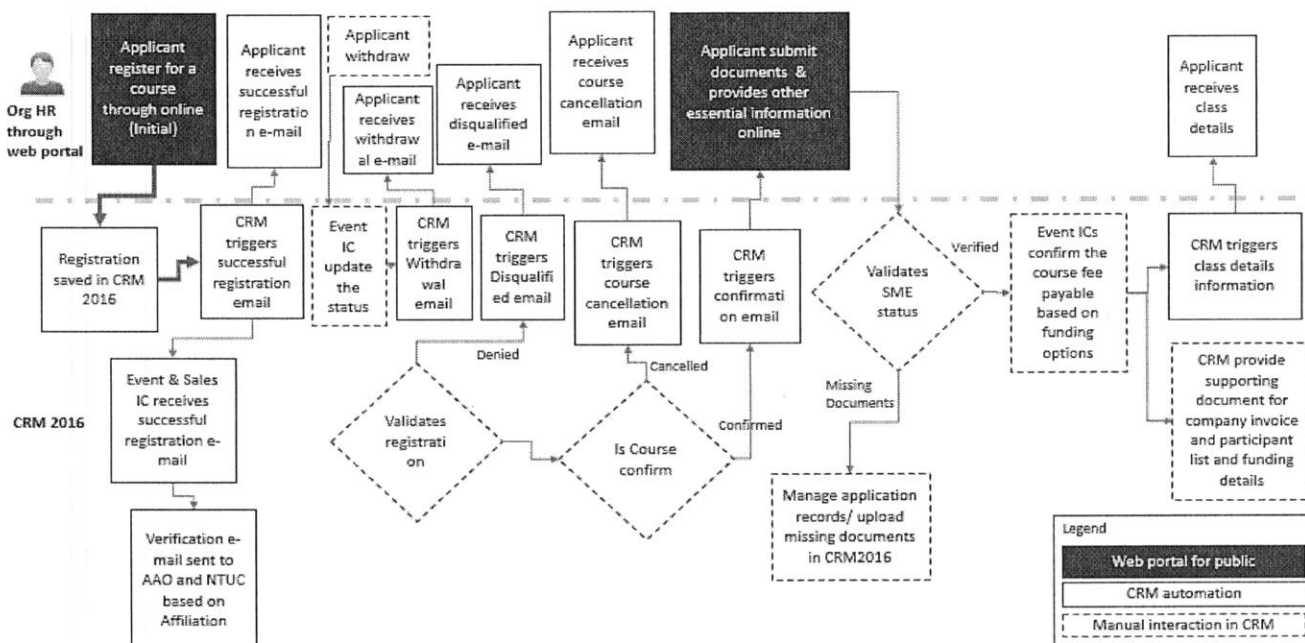
The following workflow defines the processes of registering for Student Immersion Programme.

Student Immersion Programme – Registration Workflow
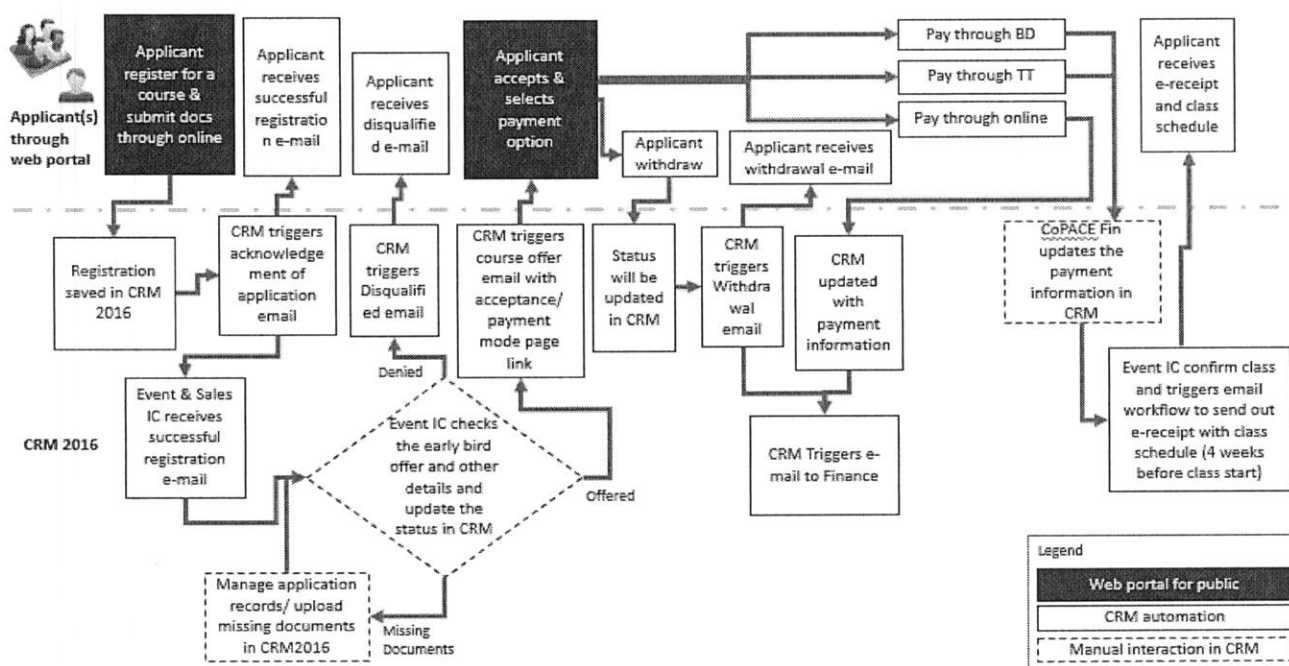
Proposed Detailed flow for online registration portion & payment portion *(Took in reference of our other programme type who is using CRM2016 as well,is quite feasible to have them)* :

Online registration input by course pax for SIP → Application route to event IC for processing & Application Acknowledgement Email auto sent to course pax → Event IC checked application in order and accept course pax's application → Change the application status of applicant in CRM to "Offer" → Autotrigger Application Acceptance email sent to course pax (Contents will mention the payment amount applicable for course pax (should be auto detect from CRM), type of payment mode/deadline, information they need to have before they proceed to the url & comes with an url to lead applicant to another webpage: Online Acceptance Page (Course pax can choose whether they accept or reject offer) . If they accept, they can choose the payment mode (Online Credit Card / Telegraphic Transfer / Bank Draft).

a) If the person choose **Online Credit Card** payment, reflect the correct fee amount to be charged to applicant → prompt applicant to input payment details online → Transaction completed successfully → Payment Mode auto reflected in CRM as **Credit Card. Payment Amount Received:** Auto indicated the received amount in crm.)

b) If the person choose **Telegraphic Transfer**, prompt to upload attachment of their telegraphic transfer proof of advice from Bank → Auto Route to our Finance for followup to track if the remittance was received and the amount received & Payment Mode should auto reflected in CRM as **Telegraphic Transfer** → Finance update the status in CRM → **Payment Amount Received:** Finance indicates the actual received payment amount in crm.)

c) If the person choose **Bank Draft** → Payment Mode should auto reflected in CRM as **Bank Draft** → Event IC follows up manually with course pax → course pax submit bank draft to event IC → Event IC manually submit to Finance for followup to track if the Bankdraft amount was received and the amount received → Finance update the status in CRM → **Payment Amount Received:** Finance indicates the actual received payment amount in crm.)

Concurrently, once the course pax choose to "Accept the offer" → to auto trigger email sent of selected required details of course pax (Self Sponsored: Participant's Name & mailing address of course pax or University Sponsored: University Billing Contact Details) to Finance to create SAP record (this will be used by Finance to create Invoice and Receipt).

The following workflow defines the processes of registering for Distance Learning.

Distance Learning – Registration Workflow
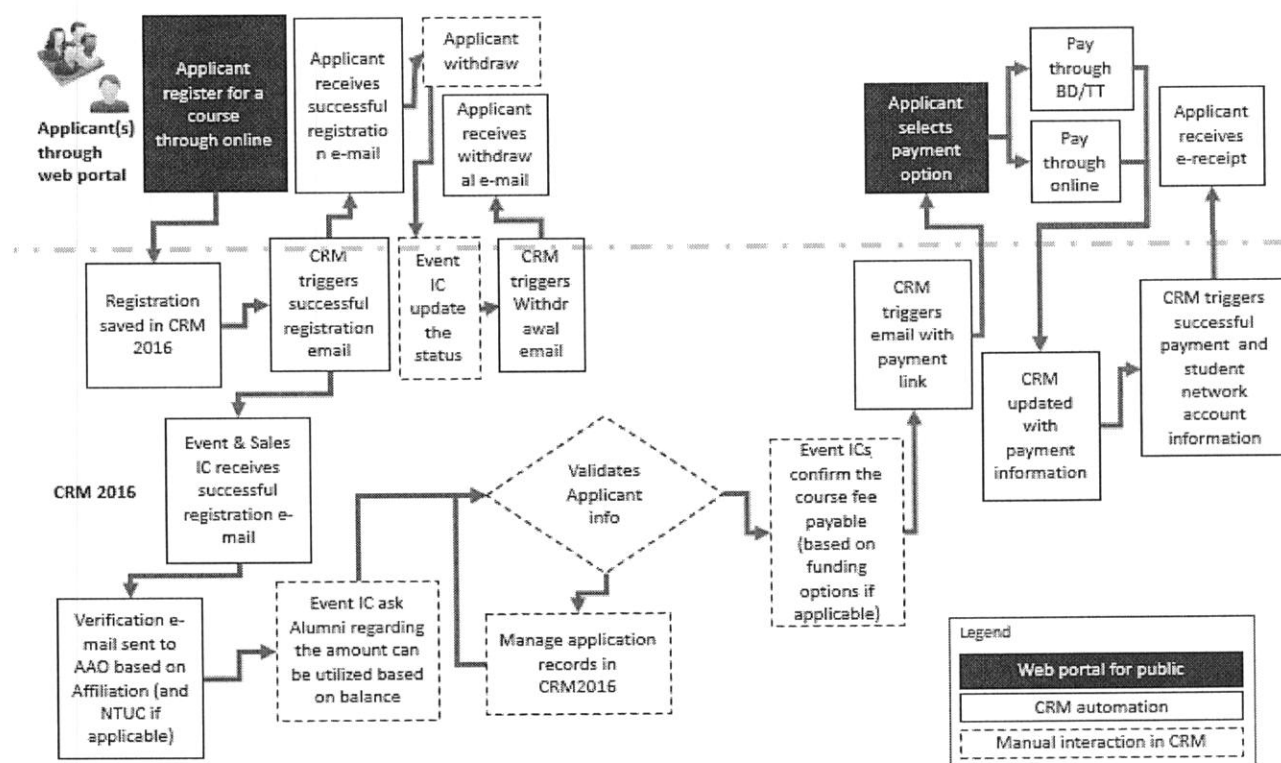
Course Registration

- The course registration form will be loaded based on the course type. Ex. If the course type is short courses, the form created for this type will be loaded.
- The following list of fields will be incorporated in the registration form for different types.

Registration form
fields matrix_201810

- The company sponsor section will be enabled to fill only when the user selects company sponsor option.
- The company sponsor and individual sponsor (group) can apply multiple applicants at one-time registration, instead of submitting individually.
- The user can add more than one participant in the registration form.
- The course name and commencement date will be filled automatically by the system, based on the intake chosen from Short Courses website.
- The user can enter postal code to retrieve the block number and road name, for Singapore address. Other such intuitive options will be provided in registration form.
- The registration form will be responsive to access using mobile devices. The layout will be adjusted automatically according to the device size.
- To verify whether the student is a current University student, they should submit University Letter at registration for SIP programme.

Acceptance Page

- The acceptance page will provide option for user to view the status of registration, any time after successful registration.
- When the course confirmed by Event ICs, the applicant will be informed to fill more information and select the preferred mode of payment from this acceptance page. Ex. One-Stop (Student Services), Online Payment.
- The online payment option will be provided if the applicant selected payment mode is Online Payment.
- The user will be verified at the time of accessing this acceptance page.
- The student could withdraw offer from this page, before paying for SIP programme.

Existing Registration Forms

Short Course

e-Learning

Need to add the attached "Front Page" for SIP before the actual registration input page to inform applicant get ready those details before they key their details.

Front Page for SIP
registration page be

SIP Registration
Form

Registration Page Sample Layout

- The following image shows registration page sample layout. The list of fields will be followed as per the fields list attached in this document.
- The registration form will be split for basic information and more information for short courses.
- The HTML mock-up design will be provided for user acceptance as next milestone.

NANYANG TECHNOLOGICAL UNIVERSITY
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Nxtmd Online Registration Form

Artificial Intelligence (01 Oct 2018 - 02 Oct 2018)

Company — **Participant** — **Pre-course Survey** — **Acknowledgement**
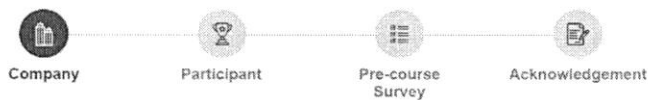
| Company Sponsored? | ● Yes   ○ No |

COMPANY   ⌄

Company Name *

[   ]

Company Billing Address

Address 1 *

[+]

City *   Country *   Postal Code *

[   ]   [⌄]   [   ]

Company Mailing Address

Company Sponsored?   ● Yes   ○ No

Address 1 *

[+]

City *   Country *   Postal Code *

[   ]   [⌄]   [   ]

COMPANY DEPT   ⌄

Company/Organisation Representative Salutation & Name

Salutation   Family Name*   Given Name *

[Dr   ⌄]   [   ]   [   ]

Contact Dept *

[   ]

Contact Details

Telephone *   Fax *   Email *

[   ]   [   ]   [   ]

[**Next**]

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College of Professional and Continuing Education

Home/ Online Registration Form

Artificial Intelligence (01 Oct 2018 - 02 Oct 2018)

| Company | Participant | Pre-course Survey | Acknowledgement |

+ Add Participant

PARTICIPANT 1   —

Participant Details   ⌃

Participant Name

Salutation	Family Name*	Given Name *
Dr ⌄		

Full Name (as shown in NRIC/Passport) *

Contact Number(s)

Office Telephone Number *	Mobile Number *	Home Number *

Participant Department	⌄
Participant Personal Details	⌄
Participant Emergency Contact Details	⌄
Mode of Payment	⌄

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PROSPECTIVE STUDENTS   STUDENTS   ALUMNI   FACULTY / STAFF   MEDIA   PARTNERS/PEERS   LOGIN   中文   Enter search term   🔍
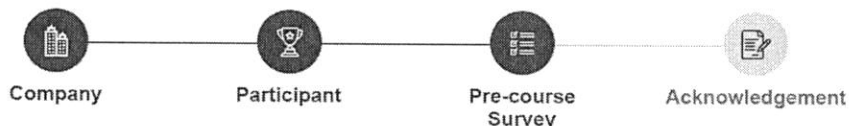
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Artificial Intelligence (01 Oct 2018 - 02 Oct 2018)

🏢 —— 🏆 —— 📑   📝
Company   Participant   Pre-course   Acknowledgement
                            Survey

PRE-COURSE SURVEY   ⌃

Have you attended our
course previously?   ● Yes   ○ No

How did you hear about us?

● PACE College Website   ○ PACE College Facebook   ○ Emailer / Mailing List

○ Online Advertisement   ○ Organisation HR/L&D   ○ SkillsFuture Portal

○ Friend's Recommendation   ○ Search Engine   ○ Other [   ]

Please upload your transcript **(PG applicants only)**: What does this category refers to?

[   ] **UPLOAD**

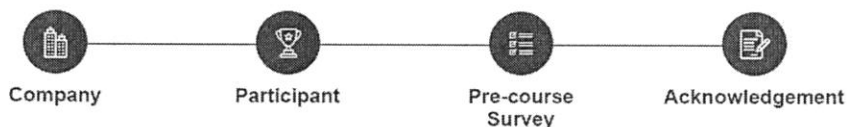Please upload your photo (for Summer programme's applicants only)

[   ] **UPLOAD**

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Home/ Online Registration Form

Artificial Intelligence (01 Oct 2018 - 02 Oct 2018)

Company ——— **Participant** ——— **Pre-course Survey** ——— **Acknowledgement**

METHODS OF PAYMENT   ∧

1. Credit Card (Visa, American Express and Mastercard only)

2. Cheque made payable to **Nanyang Technological University**

3. Invoice to Company (for Company Sponsored Participants)

4. E-invoice (for Government Organizations)

5. Telegraphic Transfer or Bank Draft (Note: All related charges are to be borne by participant)

CANCELLATION & REFUND POLICY   ∨

REPLACEMENT POLICY   ∨

TERMS AND CONDITIONS   ∨

PRIVACY CLAUSES   ∨

☐ Yes, I acknowledge and agree to the above. (change to declaration? That the above is true and accurate. Etc)

I declare that the information provided by me in this application is true and accurate to the best of my knowledge and I have not willfully suppressed any material fact. I accept that if any information given by me in this application is in anyway false or incorrect at the point of application, my application will be rejected and any offer of course placement and subsidy(if applicable) will be withdrawn.

I have read and agreed to the Terms and Conditions attached herein.

Back   **Submit**