



Information
Overview

Step One:

Partner Kick-off – Partner Sites

The partner site is the outward facing website for the university to engage the prospective student. The partner site includes the application portal and the payment module.

The kick-off process has four steps:

- Definitions
- Settings and Implementation
- Integration
- Training

For all aspects of this process, the S-U ticketing system is used to record and track all requirements as follows:

- The ticket system is the driver and primary communications channel between S-U and clients.
- All partner requests are logged in the ticket system.
- Once logged, a ticket “type” is assigned.
- In the initial implementation phase, the tickets are entered by S-U personnel. Once the client’s team learns how to use the ticketing system, the responsibility to enter tickets is transferred to the client.

This overview document includes:

- CRM Initial Settings
- Partner Site Initial Settings
- Applications Initial Settings
- Change Request Process
- Releases Management
- Blackout Periods

CRM - Initial Settings

Definitions and Settings – Configurations

For the most efficient use of the CRM, standard configurations must be established at the onset of the project. The S-U system has standard configurations with every out-of-the-box installation. While users are not required to change these, most desire some level of customization. The customization process is described below:

- a) Ticket and Implementation users
 - a. Users and Role Definitions - include but are not limited to:
 - i. Trainers
 - ii. Admins
 - iii. Enrollment Agents
 - iv. Retention Agents
 - v. Supervisors
- b) Ticket Types - include but are not limited to:
 - i. Errors
 - ii. Changes requests
 - iii. Data changes
- c) Programs
 - i. Define Courses
 - ii. Define Tuition packages
 - iii. Define start dates
 - iv. Define Required documentation
- d) Lead Sources (examples below)
 - i. Organic
 - 1. Partner site
 - 2. Referral
 - ii. Paid Search
 - 1. Google
 - 2. Bing
 - iii. Social Media
 - 1. Facebook
 - 2. LinkedIn
- e) Activity Results and Sub-results (examples below)
 - a. Contact
 - i. Interested
 - ii. Not interested
 - b. No contact

- i. Third party
 - ii. Answering Machine
- f) Lead Pipeline (status and sub statuses examples):
 - i. OPEN
 - 1. New Lead
 - 2. Attempted Contact
 - 3. Contact
 - 4. Application Started
 - 5. Applied
 - 6. Admitted
 - ii. WON
 - 1. Paid
 - 2. Enrolled
 - iii. LOST
 - 1. Closed
 - 2. Dropped
- g) Incorporate Accounts
 - a. Email
 - b. Text
 - c. SEM
 - d. Social media
 - e. Display
- h) Initial communication settings
 - a. Automatic Emails and triggers
 - b. Automatic Text and triggers
- i) Campaigns
 - a. Enrollment
 - b. Retention
- j) Initial Pipeline Reports
 - a. Operational
 - b. Terminal
- k) Dialing / Contact Strategy
 - a. Attempts
 - b. Frequency
 - c. Round robin policies
 - d. Lead closing

Once the variables are defined and entered in the system, S-U will begin the Client “train-the-trainer” process on the following functions:

- 1) Work Shift Creation and Management
- 2) User Creation and Roles Assignment

- 3) General Value Creation and Changes (Create, read, update, delete) -- examples:
 - a. Cities
 - b. Countries
 - c. Languages
 - d. Postal codes

- 4) Email and Text Management
 - a. Template creation and configuration
 - i. Attachments
 - ii. Programs related
 - b. Inbox Management

- 5) Lead Re-assignment

- 6) Email and Text Strategy
 - a. Templates
 - b. Triggers
 - c. Wild Cards
 - d. Attachments
 - e. Sending and receiving emails
 - f. Managing inboxes

- 7) Activities
 - a. Logging
 - b. Scheduling
 - c. Create new results and sub-results
 - d. Closing leads

- 8) Managing Applications
 - a. Documents
 - b. Stages
 - c. Approvals

Partner Site

Initial Settings

The starting point for the partner site is a template (see separate document) that is designed to efficiently capture the key elements, these include:

Partner Site example: www.school1.startuniversity.net

- About
- FAQ
- Programs
- Start Dates
- Start Now
 - Apply Now
 - Tuition and Course Fees
 - Payment Options
- Student Sections

Although most partner site content may be entered directly in the CRM by the client, the initial set-up is done by the S-U team, and then reviewed and approved by the client.

Content elements include:

- Images
- Branding Layout
- Additional brand elements as defined by the client

Application Portal

Initial Settings

The Application Portal is the outward facing module in which the prospective student will apply, enroll and pay to the partner institution. The Application Portal, like the Partner Sites, begin with a standardized template. The template is used to provide the following data elements:

- Application Portal Steps (typically one through seven, but can be customized)
- Fields and Naming Convention
- Field Format
- Mandatory (Y/N)
- Values from which these elements are fed
- Visibility Condition
- Step and Section Location

Change Request Process

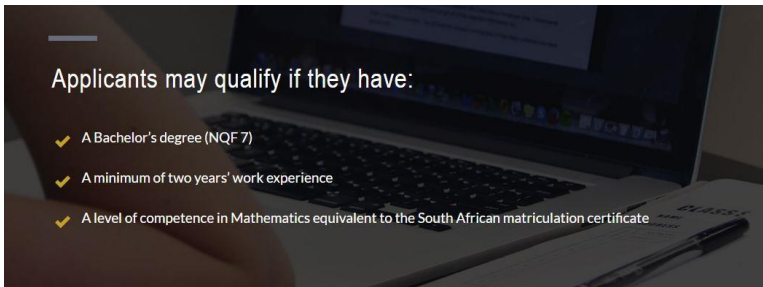
The S-U Ticket System is the driver of all change requests and the primary communication channel between S-U and the client.

Once logged, each ticket is assigned to the S-U team responsible for estimating size and scope. Depending on the nature of the request, multiple teams may be assigned.

- S-U Ticket Teams
 - Software Developer (Front-End or Back-End)
 - Designer
 - Content Manager/Operator (Social Networks Management)
 - IT Manager/Operator
 - Integration specialist

If requests impact outward facing components (e.g., partner sites, application portal, etc.) the requirements are referred to the Front-End team. This team uses the standard S-U template to capture the changes for client review and approval (no outward facing changes are deployed to production without the express approval of the client). The example below illustrates the change process.

Design Content Change – Web Sites

URL:	https://online.wits.ac.za/Programmes/Fundamentals-of-Public-and-Development-Management
At this area:	
Replace:	Applicants may qualify if they have: A Bachelor's degree (NQF 7) A minimum of two years' work experience A level of competence in Mathematics equivalent to the South African matriculation certificate
By:	Applicants may qualify if they have: A Bachelor's degree (NQF 7); or equivalent
Comments:	Please correct admission requirements as per attached.

When changes to an application field distribution are required, S-U uses the same template that is used in the initial set-up. (Example below)

Screen	Screen Name	Name of the field	Compulsory	Excel TAB LOV	Field Format
1	What would you like to study?	Email	Yes		Validated email field
1	What would you like to study?	Available Progr.	Yes		List of programs
Call to CRM - if there is an email match, this would prepopulate the name, surname, mobile # and prequal questions.					
2	Do you qualify?	Full Name	Yes		Free Text
2	Do you qualify?	Surname	Yes		Free Text
3	Create your account	Date of birth	Yes		Date Controls
3	Create your account	Gender	Yes		Male/Female/Other
4	Personal information	Maiden Name	No		Free text
4	Personal information	Population Group	Yes	Population Group	List of population Group

Once the task/requirement is assigned, S-U begins a process in which the change will be hosted/tested on different environments before released: These environments are:

- Development
- Testing
- QA

Upon client approval, the change is moved to Production and goes live. Live pushes are scheduled and occur only once clients are notified, documentation provided and reviewed by S-U and the client. In addition, pushes are only made during business hours.

Release Management

S-U employs a “versioning” process for each new release. Prior versions are archived on secure servers in the event a roll-back is necessary. New releases are never pushed without this safety measure.

Releases typically include any of the following components:

- Fixes
- Design Changes
- New Functionality or Enhancements

Scheduled releases typically occur monthly. If required, “hot” fixes can be pushed on an ad hoc basis.

Any release that may have an operational impact is scheduled and coordinated with S-U clients as noted in the table below:

Day 1	Day 2	Day 3	Day 4
Proposed Release Communication Distributed to Client	Client Conference: Release Overview, Q&A	Go Live (during office hours)	Additional Team Members Assigned to Monitor Release and Address Client Questions

Once a release is locked and communicated to client, no features are added.

Black-out Periods

A release is typically followed by a black-out period in which no new features are released, but “hot fixes” may be addressed. These periods are established with the client.

In addition, scheduled black-out periods include:

- December Break – December 23 through January 3
- Thanksgiving (US)
- Labor Day (US and Argentina)
- Memorial Day (US)
- Independence Day (US and Argentina) July 4th and July 9th
- Spring Break (Easter / Passover)

Application Security and Data Protection

Server Architecture

Standard configuration includes three servers:

- Application Server / behind a firewall with ports 80 / 443 open
- Database Server / no public IP
- SFTP Server / behind a load balancer with port 22 open
 - This server is used to integrate files with clients
 - All integration is segregated to a single server not impacting other operations

Load balancers are used to hide the servers IP addresses.

Servers are accessed using Remote Desktop ports only open for our IPs

Website security

HTTPS/SSL

- S-U ensures Sitewide SSL in our CRM and in every Partner Site
- SHA256 Encryption is used for SSL certificates
- Secure cookies are used in all S-U sites

Servers configuration

- No FTP services or other services are enabled in application server
- Antivirus software is installed on all S-U servers limiting potential threats from student entry uploads
- Sites are protected against DoS using request filtering modules
- SFTP server is used to integrate files with the schools
- SLA with our vendor (Rackspace) ensures all servers have the latest available security patches and updates.

Application Security

- Parametrized queries in our applications are used to avoid SQL Injection
- Passwords are stored encrypted in database (SHA512)
- Passwords expire every 90 days
- No simple passwords are allowed in the application.

- A log of sessions and attempts is maintained and monitored to ensure no unauthorized access
- Application enables the customization of permissions for every role and allows creation of custom roles.

Environments

- Development
- QA
- Production

Data protection

Back-up Policy

- Website configurations and files are backed-up weekly into the Rackspace Cloud Back-up system
- Document files are backed-up once a day into the Rackspace Cloud Back-up system
- Databases are fully backed up once a day and the transactions logs are backed up every 5 minutes. This allow S-U to recover the database to any previous state during the date.
- Database Full Backups are retained for four weeks
- Websites configurations and file Back-ups are retained for eight weeks
- Data is backed up to an additional secondary location to ensure redundancy of backups in case of disaster.
- System images are created once a week to enable complete server recovery in a disaster scenario.

Additional security procedures may be implemented as required by clients.