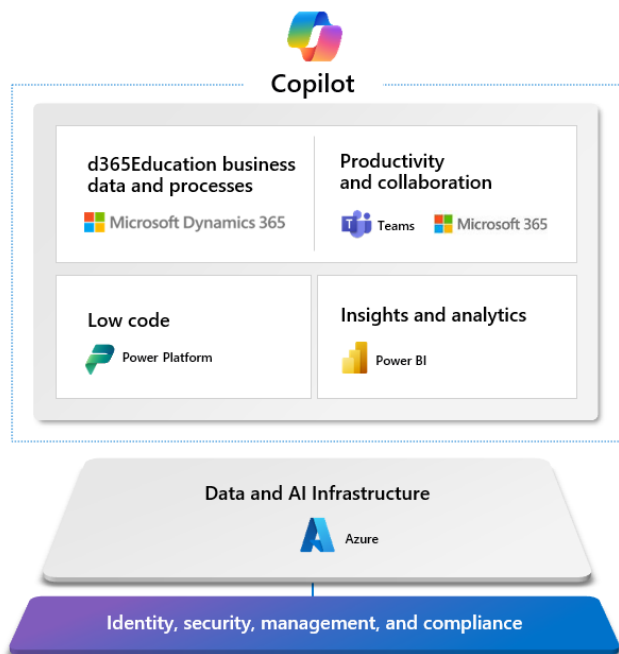




SOLUTION BLUEPRINT

Microsoft Dynamics 365 for Education,
www.d365Education.com,

Visit Microsoft Marketplace: [Education Management for Microsoft Dynamics 365](#)

Visit Learn.d365.Global: [Education Guide Introduction](#)

ABSTRACT

This Solution Blueprint defines the strategic, functional, technical, and delivery foundations for d365Education, a Microsoft Dynamics 365-based platform designed for schools, colleges, universities, training organisations, and education service providers. It establishes a shared understanding of the business outcomes, solution scope, architecture principles, implementation approach, governance model, and risk posture required to deliver a successful education-sector solution.

David@d365.Global

AU: 1 Sussex St, Sydney NSW 2000

SG: 59 Ubi Avenue 1# 03-11, Singapore 408938

UK: 71-75 Shelton St, London, WC2H 9JQ

USA: 8 The Green # 20058, Dover DE 19901

AU +61 2 9037 2385 | SG +65 3 1251534 |

UK +44 2036 953042 | USA +1 646 652 0780

www.d365Education.com

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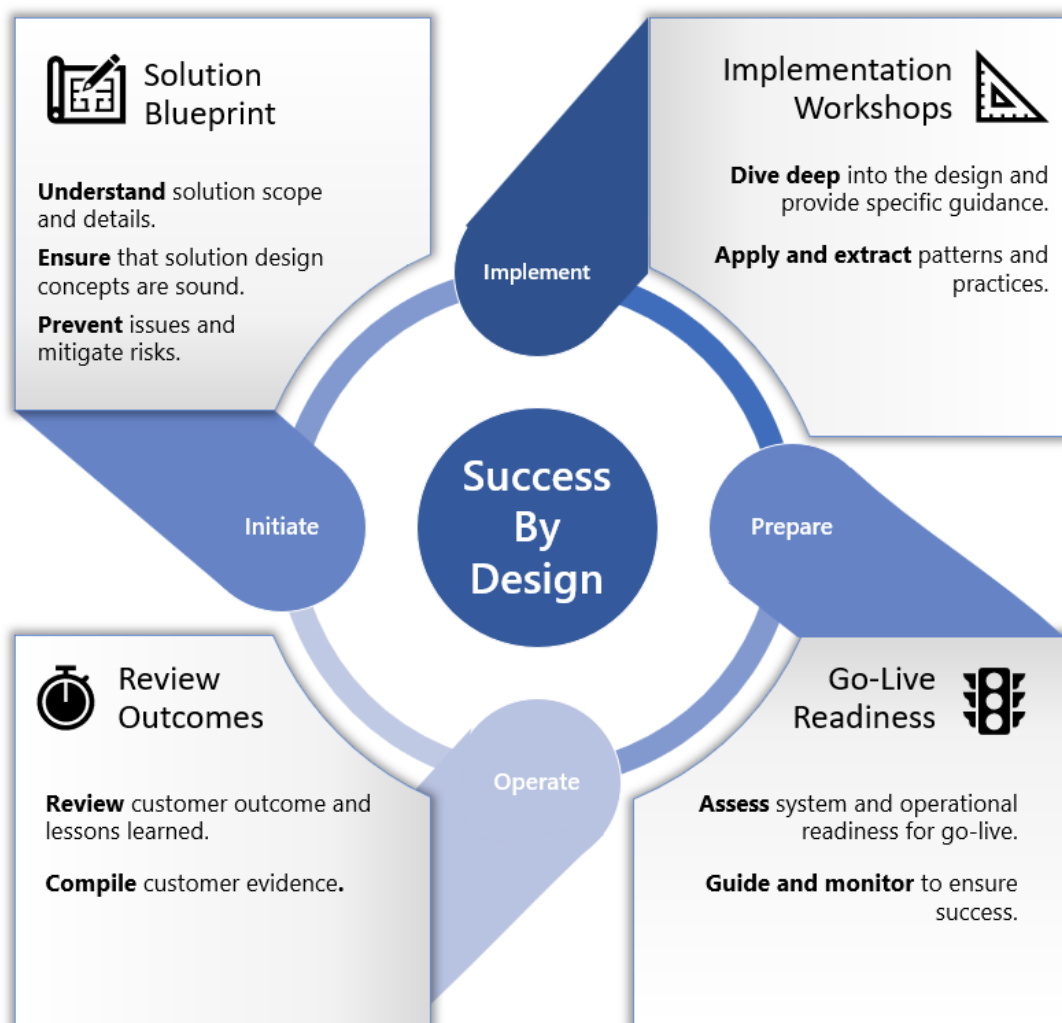
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1 Executive Summary

Purpose of the Solution Blueprint

This Solution Blueprint defines the strategic, functional, technical, and delivery foundations for d365Education, a Microsoft Dynamics 365-based platform designed for schools, colleges, universities, training organisations, and education service providers. It establishes a shared understanding of the business outcomes, solution scope, architecture principles, implementation approach, governance model, and risk posture required to deliver a successful education-sector solution.

The blueprint is intended to guide executive sponsors, education leaders, project managers, solution architects, functional consultants, technical teams, and change leaders through the early design and planning decisions that shape the program. It supports clear decision-making before implementation, reduces ambiguity, and provides the basis for future detailed design, configuration, integration, data migration, testing, adoption, and operational readiness activities.



Education Sector Context and Strategic Drivers

Education providers are operating in an environment shaped by increasing learner expectations, competition for enrolments, pressure to improve retention and student success, demand for flexible and hybrid learning models, and the need for stronger engagement across the full learner lifecycle. Institutions are also expected to demonstrate operational efficiency, data-informed decision-making, regulatory compliance, privacy protection, and improved collaboration between academic, administrative, student support, marketing, admissions, finance, and alumni teams.

d365Education responds to these sector drivers by providing a unified Microsoft business application platform that connects prospective students, enrolled learners, staff, programs, courses, applications, enquiries, communications, support cases, placements, alumni relationships, partnerships, and operational workflows. By using Dynamics 365, Power Platform, Microsoft 365, Dataverse, Power BI, and Microsoft's cloud security and identity services, the solution is positioned to support a connected, scalable, and extensible education operating model.

d365Education Vision and Target Outcomes

The vision for d365Education is to deliver a modern, cloud-based education management and engagement platform that enables institutions to attract, enrol, support, retain, and grow relationships with learners and stakeholders through a single, data-driven Microsoft ecosystem. The solution aims to improve the quality of student engagement, streamline administrative processes, increase visibility of learner and institutional performance, and provide a flexible foundation for future innovation.

- **Improved learner lifecycle management:** consistent processes from recruitment and enquiry management through admissions, enrolment, student support, progression, alumni, and lifelong engagement.
- **Enhanced operational efficiency:** reduced manual administration, clearer workflow ownership, and improved automation across education business processes.
- **Better decision-making:** trusted data, role-based dashboards, actionable insights, and reporting across student engagement, admissions performance, retention, compliance, and service delivery.
- **Stronger collaboration:** integrated use of Microsoft 365, Teams, Outlook, SharePoint, and Power Platform to support cross-functional teams and improved stakeholder communication.
- **Scalable innovation platform:** a composable architecture that can evolve with institutional strategy, emerging AI capabilities, regulatory obligations, and sector-specific requirements.

Success by Design Alignment

d365Education will be delivered in alignment with Microsoft's Success by Design methodology, which provides prescriptive guidance and structured reviews to help Dynamics 365 project teams proactively manage technical, architectural, and project risks. Microsoft describes Success by Design as a framework built from real-world Dynamics 365 implementation experience, with guidance for architecting, building, testing, deploying, and operating solutions across the implementation lifecycle.

The blueprint aligns to the Success by Design lifecycle stages of Strategize, Initiate, Implement, Prepare, and Operate. It also reflects the Solution Blueprint Review focus areas commonly used in Dynamics 365 programs, including program strategy, business process strategy, application strategy, data strategy, integration strategy, intelligence and reporting strategy, security strategy, application lifecycle management, testing strategy, and environment and capacity planning.

Success by Design Area	d365Education Application
Program strategy	Defines business outcomes, executive sponsorship, scope, roadmap, governance, decision rights, and success measures.
Business process strategy	Maps education processes across recruitment, admissions, enrolment, learner support, engagement, compliance, and alumni management.
Application strategy	Determines the Dynamics 365 apps, Power Platform components, Microsoft 365 services, and education-specific extensions required.
Data and integration strategy	Defines master data, migration approach, integration patterns, data quality, data ownership, and connectivity with student information, finance, learning, identity, and reporting systems.
Security, compliance, and governance	Establishes role-based access, privacy controls, auditability, identity management, retention approach, and compliance obligations relevant to education providers.
Testing, readiness, and operate model	Sets expectations for test planning, user acceptance, training, go-live readiness, support transition, service management, and continuous improvement.

Key Decisions, Risks, and Recommendations

Several early decisions will shape the success of d365Education. These include confirming the target education segments and priority use cases, defining the minimum viable product and phased roadmap, selecting the core Dynamics 365 and Power

Platform components, agreeing the data model and integration strategy, confirming the security and privacy model, and determining the implementation governance approach. These decisions should be made with clear executive sponsorship and documented as part of the program decision register.

Key risks include excessive customisation, incomplete understanding of education business processes, poor data quality, insufficient integration planning, unclear ownership of security and privacy controls, limited change management, inadequate testing, and delayed operational readiness. These risks should be addressed using Success by Design reviews, disciplined governance, early architecture validation, iterative delivery, clear acceptance criteria, and active engagement from business and technical stakeholders.

- **Adopt a phased implementation roadmap:** begin with high-value capabilities such as enquiry management, admissions, engagement, case management, and reporting before expanding into advanced automation and AI-enabled services.
- **Prioritise standard platform capabilities:** use Dynamics 365 and Power Platform configuration before custom development wherever possible to preserve upgradeability, supportability, and alignment with Microsoft's roadmap.
- **Establish strong data governance:** define ownership, quality rules, retention requirements, migration scope, data stewardship, and reporting definitions early in the program.
- **Design integration deliberately:** validate integration patterns for student information systems, learning management systems, finance systems, identity providers, communication channels, and external portals before build activities commence.
- **Invest in adoption and change management:** align process design, training, communication, role-based enablement, and executive sponsorship to drive measurable business value.
- **Use Success by Design checkpoints:** conduct structured reviews for solution blueprint, data, integration, security, testing, performance, environment strategy, and go-live readiness to reduce risk throughout the lifecycle.

2 Program Strategy

The d365Education program will use Microsoft's Success by Design principles to provide a structured, risk-aware approach for defining, validating, implementing, and operating a Microsoft Dynamics 365 solution for education institutions. The program strategy establishes the business vision, institutional outcomes, governance model, delivery approach, adoption measures, and key assumptions required to guide a successful implementation from initiation through operation.

Program Objectives and Expected Benefits

The primary objective of d365Education is to deliver a modern, scalable, and integrated education management platform that supports the full student, academic, administrative, and engagement lifecycle. The solution is designed to improve institutional visibility, streamline processes, reduce manual effort, and provide a trusted data foundation for decision-making.

- Establish a consolidated view of students, applicants, guardians, alumni, faculty, partners, and institutional stakeholders.
- Standardise and automate core processes for admissions, enrolment, student services, communications, case management, and engagement.
- Improve institutional responsiveness through workflow automation, service queues, notifications, and guided processes.
- Enable data-driven management through Power BI dashboards, operational reporting, and KPI tracking.
- Integrate Dynamics 365 with Microsoft 365, Teams, Outlook, SharePoint, Power Platform, and other core institutional systems.
- Support long-term extensibility through a secure, governed, and configurable solution architecture.

Institutional Scope and Deployment Approach

The initial institutional scope will focus on the priority education capabilities required to deliver measurable business value while establishing a reusable platform for future expansion. Scope will be confirmed during requirements confirmation and solution blueprint review activities, with each functional area assessed against standard Dynamics 365 and Power Platform capabilities before any extension is considered.

- **Phase 1:** Foundational platform setup, security model, contact and account structures, admissions and enquiry management, core student engagement processes, and reporting foundations.
- **Phase 2:** Expanded student services, case management, academic engagement, faculty interactions, communications, and workflow automation.

- **Phase 3:** Advanced analytics, alumni engagement, partner management, integrations, mobile scenarios, AI-assisted productivity, and continuous improvement releases.

The recommended deployment approach is an incremental rollout using controlled releases. Each release will include design validation, configuration, integration, data migration, testing, training, transition planning, and go-live readiness assessment. This approach reduces implementation risk, enables earlier adoption, and allows the institution to refine processes based on user feedback.

Stakeholder Groups and Governance Model

Effective governance is essential to ensure that the solution remains aligned to institutional objectives, regulatory obligations, operational priorities, and user adoption goals. The governance model defines clear decision rights, escalation paths, reporting cadence, and ownership across business, technology, and delivery teams.

Stakeholder Group	Primary Responsibilities
Executive Sponsors	Set strategic direction, confirm funding, resolve high-impact decisions, and champion institutional adoption.
Program Steering Committee	Monitor progress, risks, scope, budget, benefits, and readiness across the program lifecycle.
Business Process Owners	Define target processes, validate requirements, approve designs, and confirm operational readiness.
Solution Architecture Team	Ensure the solution is secure, scalable, integrated, maintainable, and aligned to Microsoft recommended practices.
Functional Workstream Leads	Manage requirements, configuration, testing, change impacts, and user acceptance for each capability area.
Technical and Integration Teams	Deliver environments, integrations, data migration, identity, security, automation, and deployment pipelines.
Change, Training, and Adoption Leads	Prepare users for new ways of working, coordinate communications, deliver training, and track adoption KPIs.

Delivery Methodology and Workstreams

The delivery methodology will combine Success by Design governance checkpoints with an iterative implementation approach. The program will progress through the Success by Design lifecycle stages of Strategize, Initiate, Implement, Prepare, and Operate, ensuring that risks are identified early, design decisions are validated, and readiness is assessed before go-live.

- **Program and Project Management:** Planning, governance, schedule management, RAID management, reporting, and stakeholder coordination.
- **Business Process and Functional Design:** Process mapping, requirements validation, fit-gap analysis, configuration, workflow design, and acceptance criteria.
- **Solution Architecture:** Architecture principles, platform design, application strategy, extensibility decisions, security model, and integration patterns.
- **Data Management:** Data model alignment, data quality assessment, migration planning, cleansing, transformation, loading, and reconciliation.
- **Integration and Automation:** Integration design, API strategy, Power Automate flows, event-driven processes, and connectivity to institutional systems.
- **Reporting and Analytics:** Power BI dashboards, operational reports, executive KPIs, data governance, and analytics adoption.
- **Testing and Quality Assurance:** Test strategy, system testing, integration testing, user acceptance testing, regression testing, and defect management.
- **Training, Change, and Adoption:** Communications, role-based training, adoption planning, champion network, change readiness, and post-go-live reinforcement.
- **Release, Cutover, and Support Transition:** Deployment planning, go-live readiness, cutover execution, hypercare, support model transition, and continuous improvement planning.

Success Measures and Adoption KPIs

Success will be measured across business outcomes, operational performance, user adoption, data quality, and platform reliability. KPIs will be baselined during discovery and refined throughout implementation to ensure that benefits are measurable and linked to institutional objectives.

Measure Area	Indicative KPIs
Student and Stakeholder Experience	Improved response times, enquiry conversion rates, service satisfaction, case resolution times, and communication effectiveness.
Operational Efficiency	Reduction in manual processing, duplicated data entry, spreadsheet dependency, follow-up delays, and process exceptions.
Adoption and Usage	Active user rates, role-based feature usage, training completion, process compliance, and reduction in shadow systems.

Measure Area	Indicative KPIs
Data Quality and Reporting	Completeness of key records, duplicate reduction, reporting accuracy, dashboard usage, and timeliness of institutional insights.
Platform Health	Environment stability, integration success rates, security compliance, release quality, performance, and support ticket trends.

Assumptions, Constraints, and Dependencies

The following assumptions, constraints, and dependencies will be validated during the Initiate phase and managed through the program RAID process. Any material change to these items may affect scope, timeline, budget, adoption readiness, or implementation risk.

- **Assumptions:** Executive sponsorship is active; business process owners are available; standard Dynamics 365 and Power Platform capabilities will be prioritised; source data will be accessible for migration; and institutional SMEs will participate in design, testing, and training.
- **Constraints:** Delivery must align with academic calendars, examination periods, enrolment deadlines, privacy obligations, budget approvals, internal IT capacity, and institutional change windows.
- **Dependencies:** Microsoft tenant readiness, Entra ID identity configuration, environment provisioning, data migration extracts, integration endpoint availability, third-party system access, communications planning, and timely approval of design decisions.
- **Risk Management:** Key risks will be reviewed through Success by Design workshops and governance forums, with mitigating actions tracked through the program RAID log and reflected in release readiness decisions.

Success by Design Alignment

The d365Education Solution Blueprint will be used as an input to the Solution Blueprint Review, which is the starting point for Success by Design engagement and is intended to confirm solution scope, conceptual design, project strategy, and early implementation risks. As the program progresses, additional Success by Design reviews should be scheduled for testing, data, integration, security, application lifecycle management, performance, go-live readiness, and transition to operations.

3 Business Process Strategy

The Business Process Strategy for d365Education defines the target operating model for education providers adopting Microsoft Dynamics 365, Microsoft Power Platform, Microsoft 365, and Business Central. Consistent with Microsoft Success by Design, the blueprint validates business scope, future-state process alignment, fit-gap priorities, risks, dependencies, and expected outcomes before detailed build activities commence.

Current-State Process Overview

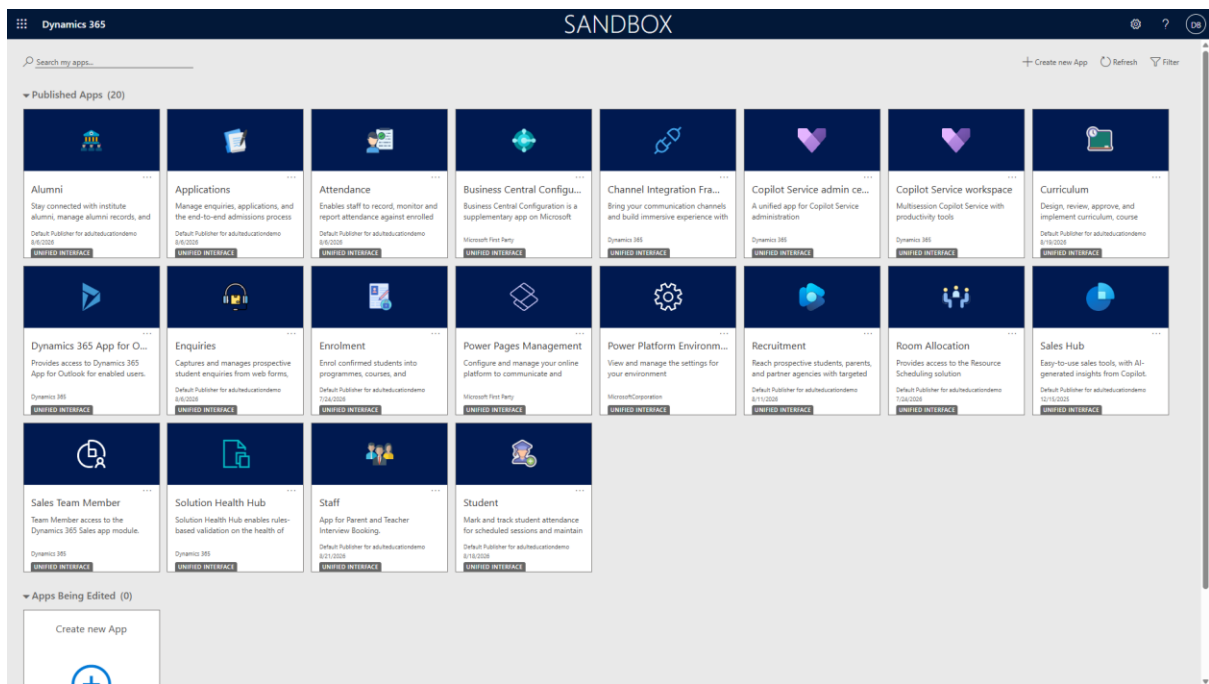
Most education organisations operate across multiple disconnected systems for recruitment, enquiry capture, admissions, enrolment, student records, learning engagement, finance, human resources, risk, parent communications, and alumni engagement. Manual spreadsheets, email inboxes, shared drives, and point solutions often create duplicate data entry, limited visibility of the student lifecycle, inconsistent communications, and fragmented reporting.

Key current-state challenges typically include inconsistent lead qualification, limited segmentation for marketing campaigns, paper-based or semi-manual admissions workflows, manual fee discount calculations, limited integration between student management and finance, reactive student risk management, and disconnected staff, parent, industry partner, and alumni interactions.

Future-State Education Process Model

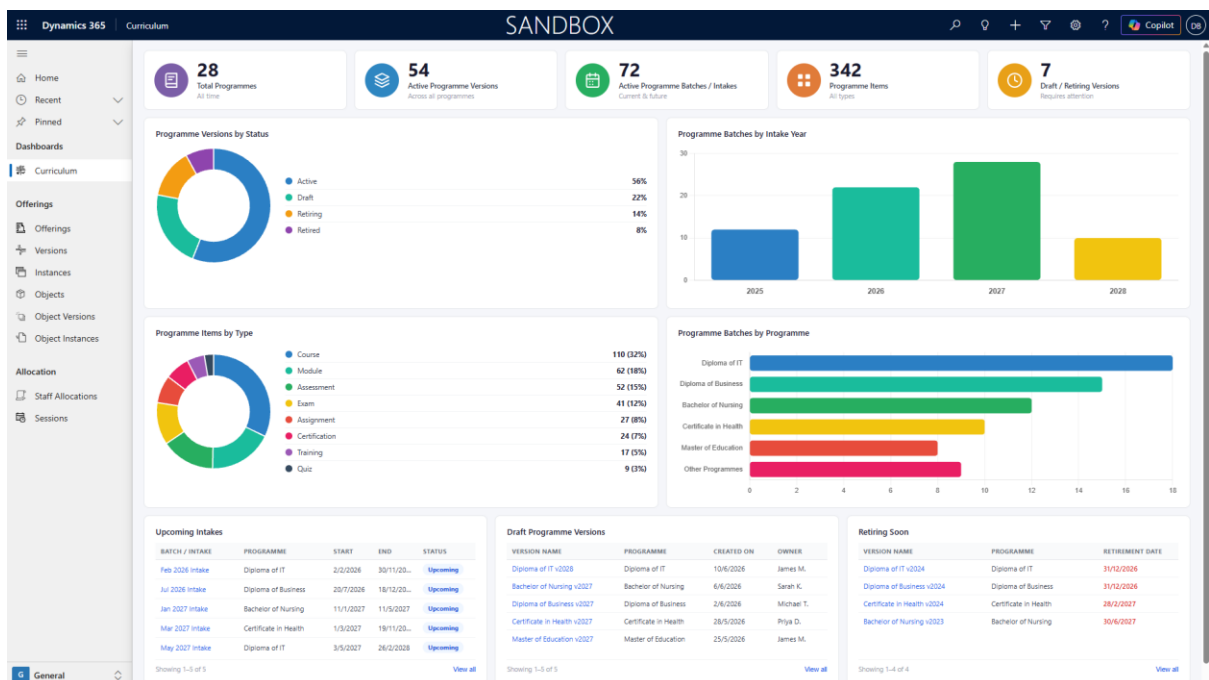
The future-state process model positions d365Education as a single, role-based engagement and operations platform across the full education lifecycle: attract, engage, apply, admit, enrol, support, retain, graduate, and reconnect. Dynamics 365 provides relationship, case, marketing, and workflow capabilities; Power Platform enables automation, apps, portals, and analytics; Microsoft 365 supports collaboration and communications; and Business Central manages financial operations for schools and education providers.

The target model supports a common student, family, organisation, staff, contractor, employer, and stakeholder data model. It enables end-to-end process ownership, workflow-driven approvals, proactive communications, embedded compliance controls, and consolidated reporting for leadership, administration, finance, academic, wellbeing, and marketing teams.



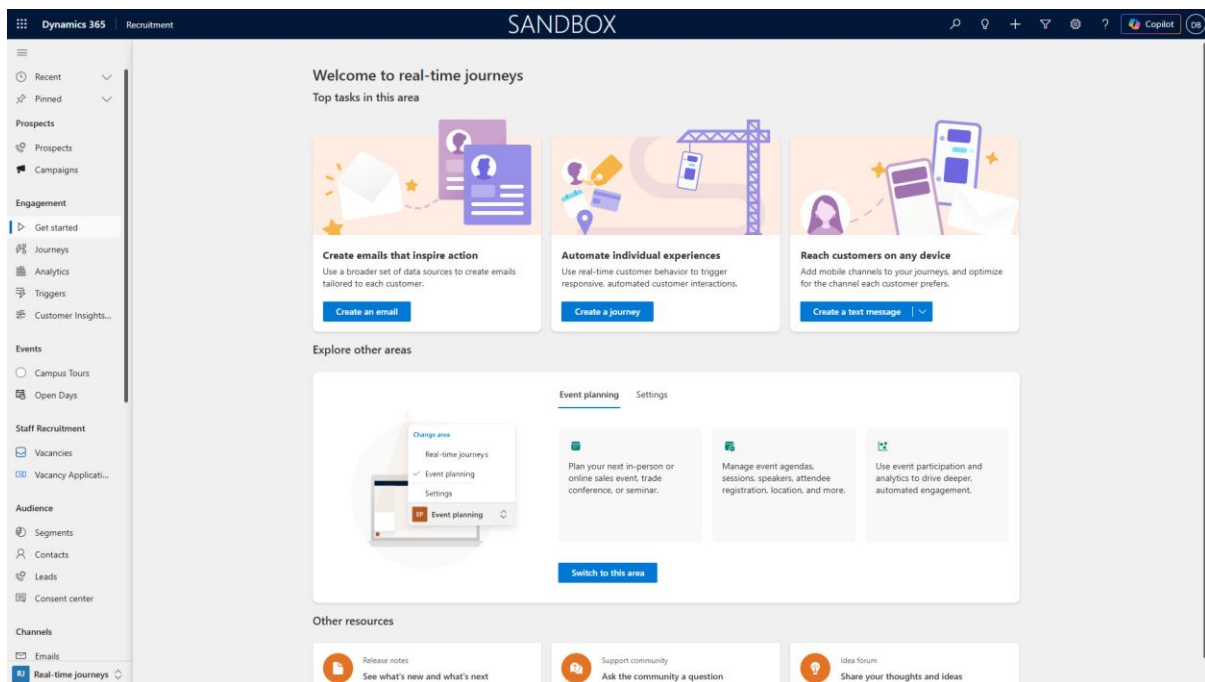
Curriculum, Design and Implement Programs and Courses

d365Education will manage curriculum structures, course catalogues, program pathways, subjects, units, learning outcomes, prerequisites, delivery modes, locations, academic periods, timetables, and approval workflows. Program design will be supported through configurable metadata, curriculum governance stages, version control, and publishing workflows so that approved programs and courses can be surfaced to marketing, admissions, enrolment, timetabling, and finance processes.



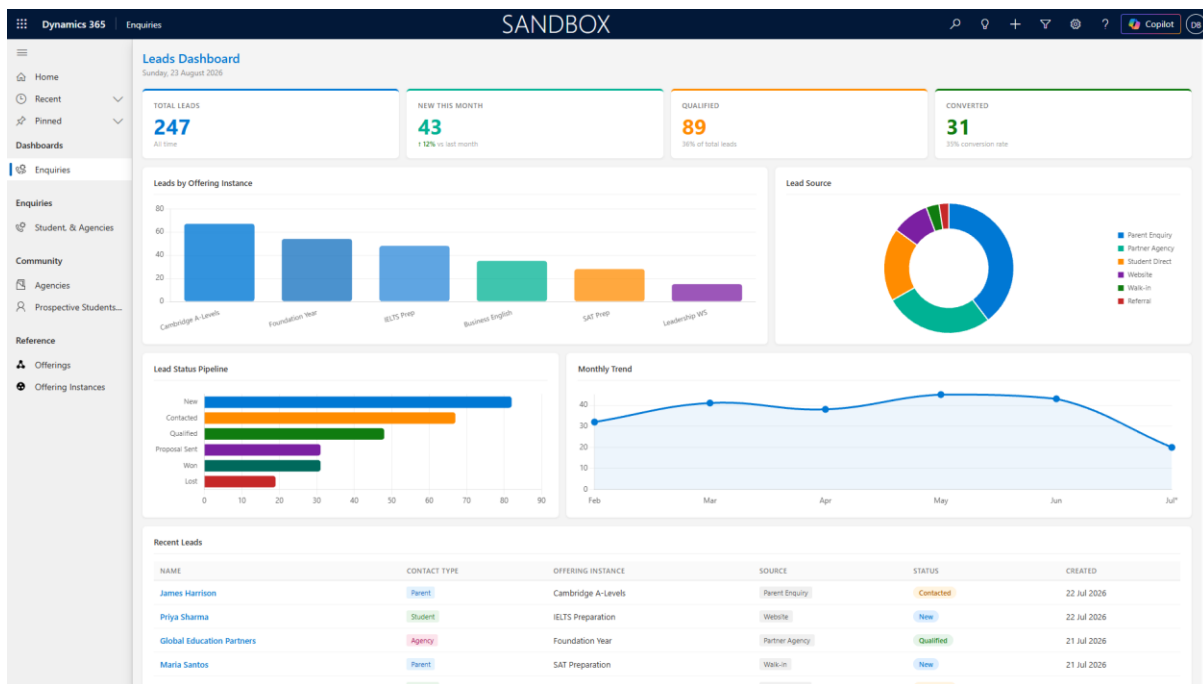
Recruitment through Targeted Marketing Campaigns

Recruitment will use segmented campaign journeys to attract prospective students, families, agents, employers, and community stakeholders. Campaigns may be targeted by region, school level, program interest, prior engagement, enquiry source, event attendance, scholarship eligibility, or alumni relationship. Marketing interactions will be tracked against prospects and organisations to provide visibility of campaign effectiveness, enquiry conversion, and preferred communication channels.



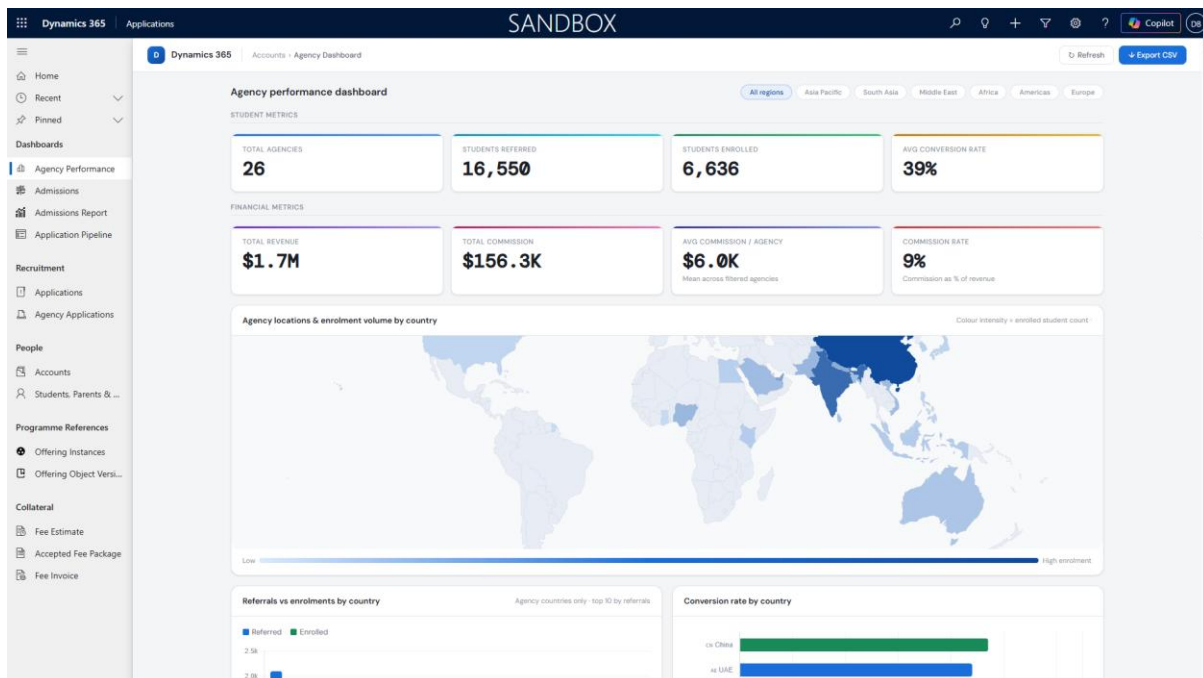
Enquiries Management

Enquiries from websites, portals, phone calls, email, events, agents, social channels, and referrals will be captured into a structured enquiry management process. Each enquiry will be classified by source, program interest, learner profile, urgency, owner, consent status, and next-best action. Automated routing, service-level monitoring, templates, and follow-up reminders will improve responsiveness and conversion visibility.



Applications, Admissions and Enrolment

The applications, admissions, and enrolment process will support online application submission, document collection, eligibility checks, interview or assessment scheduling, offer management, acceptance, fee deposit tracking, enrolment confirmation, and onboarding. Workflow rules will support domestic and international admissions, scholarship pathways, guardianship requirements, compliance checks, waitlists, deferrals, withdrawals, and re-enrolments.



Student Lifecycle Management

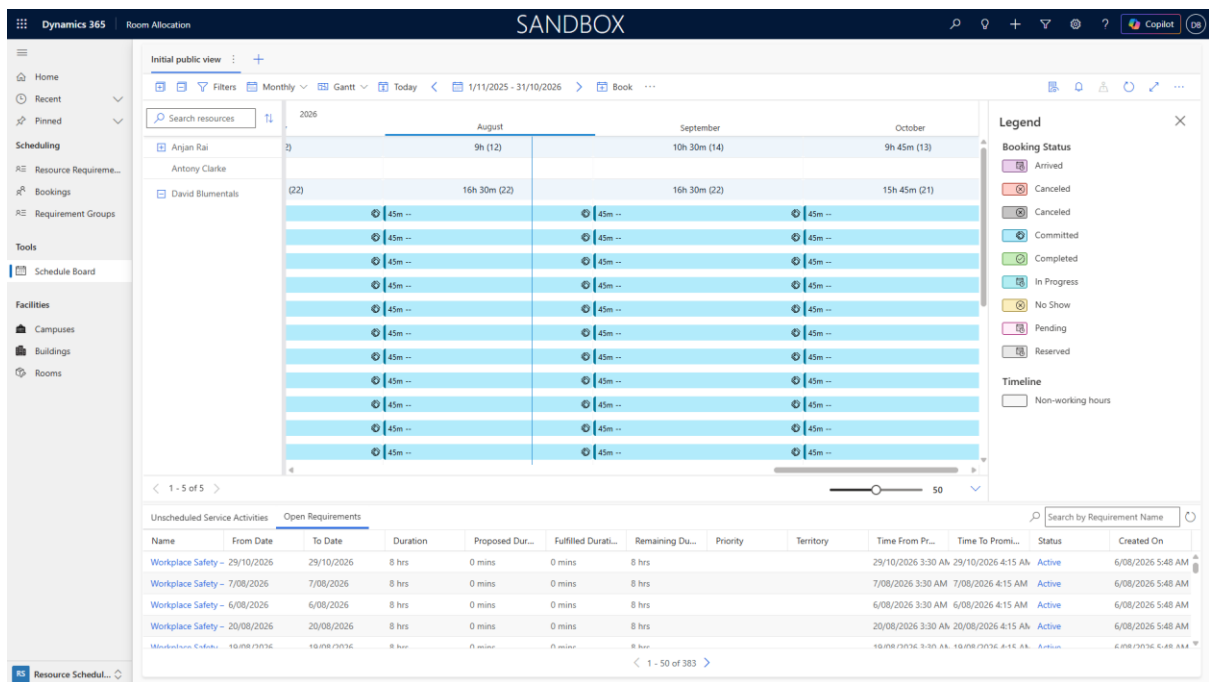
d365Education will maintain a consolidated view of the student lifecycle from initial contact through enrolment, attendance, academic engagement, wellbeing, progression, graduation, and alumni status. The system will provide role-based dashboards for admissions staff, academic leaders, student services, wellbeing teams, finance, and executives to track student status, risks, activities, cases, communications, and obligations.

The screenshot displays the Dynamics 365 Student interface for a student named Adam Powell. The interface is divided into several sections:

- Header:** Shows the Dynamics 365 logo, the word "Sandbox", and various utility icons like search, save, and refresh.
- Left Navigation Panel:** Contains a list of tabs including Home, Recent, Pinned, Community, and a search bar. Below these are categories like Curriculum, Offerings, Sessions, Mark Attendances, Extra Curricular, Medical, Excursions, Wellbeing, Results, Academic Reports, Tools, and Reports.
- Student Card:** Displays the student's name "Adam Powell" with a contact icon and a dropdown menu showing "Contact" and "Student". It also shows the "Phase 1 - Education" and "Student Record Type" as "Janam Maharjan".
- Summary Tab:** The active tab, showing a grid of information:
 - Contact Information:** First Name (Adam), Last Name (Powell), Email (adam.powell@studentmail.com), Mobile Phone (+61 412 556 778), Date of Birth (18/06/2010), Phone (---), Contact Type (Student), Preferred Method of Contact (Email), Primary Parent / Guardian (Antony Powell), Secondary Parent / Guardian (Sarah Quinn).
 - Status:** Phase (Phase 1 - Education), Program Batch (Senior School - Grade 10 - 2026).
 - Address Details:** Address 1: Street 1 (42 Bay Street), Address 1: Street 2 (Apartment 8), Address 1: Street 3 (---), Address 1: City (Brighton), Address 1: State (VIC), Address 1: Postal Code (3186), Address 1: Country/Region (Australia), Address (Brighton VIC 3186, Australia).
 - Medical:** Medical Record (Medical Record 5).
- Comments:** A section for notes and updates, showing recent comments from Janam Maharjan regarding Adam's enrollment and progress.
- Timeline:** A section for a chronological view of events, showing a recent appointment from Anjan Raj for a Parent-Teacher Interview.

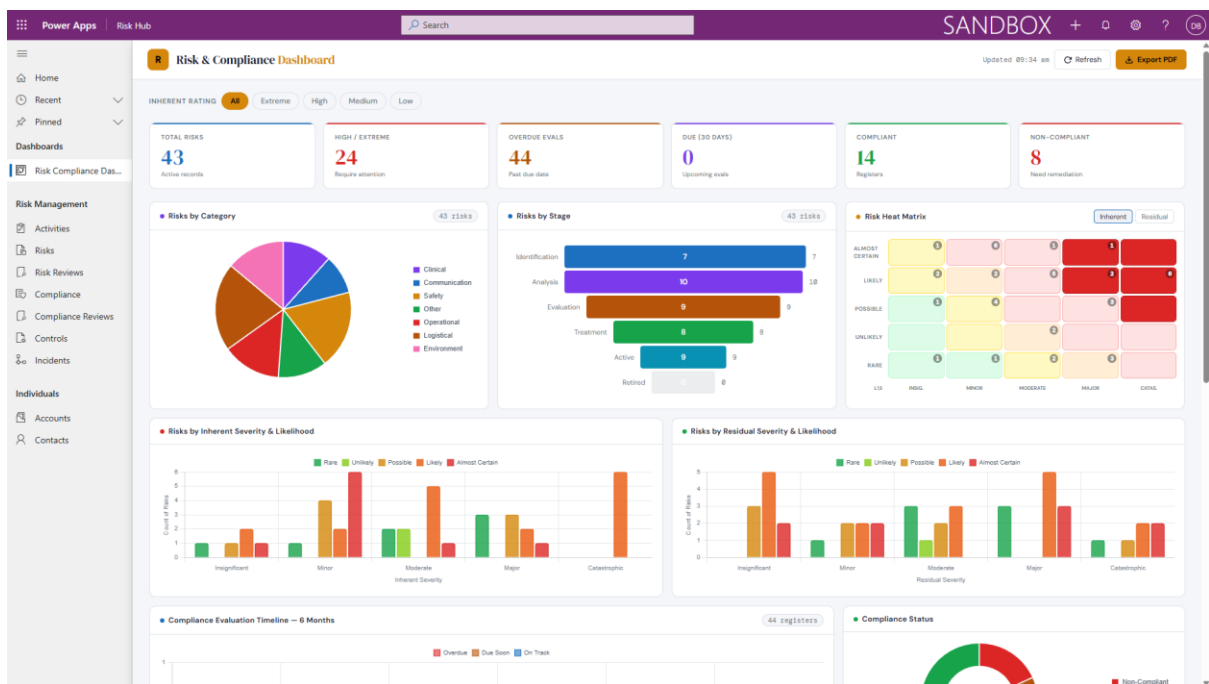
Room Allocation System

The room allocation process will manage teaching spaces, interview rooms, boarding accommodation, specialist facilities, accessibility requirements, capacity rules, equipment needs, and booking conflicts. Integration with calendars and timetabling processes will support visibility of room availability, approvals, utilisation, and exceptions.



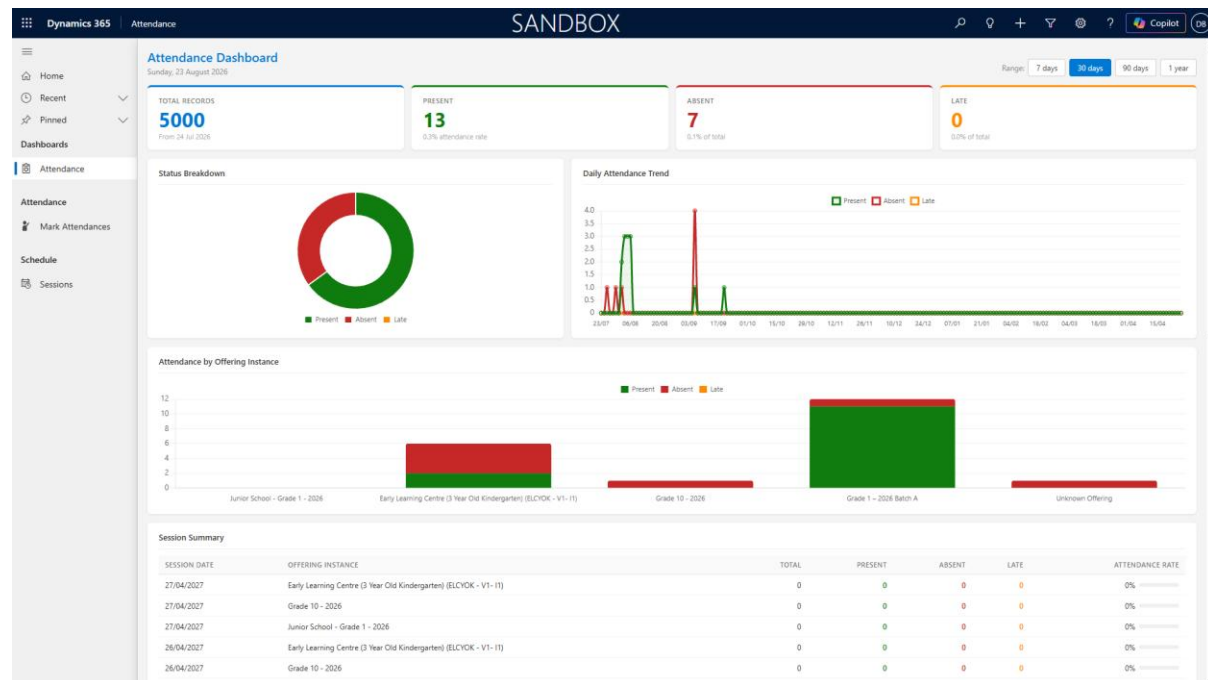
Student Services, Risk and Incident Management

Student services will manage wellbeing cases, support requests, risk indicators, incidents, complaints, adjustments, safeguarding referrals, medical notes, accessibility support, and escalation workflows. Role-based security will protect sensitive information while enabling authorised teams to collaborate on interventions, action plans, communications, and follow-up activities.



Attendance, Academic Engagement and Communications

Attendance and academic engagement processes will capture attendance events, absence reasons, late arrivals, participation indicators, assessment engagement, communication history, and intervention triggers. Automated notifications can be sent to students, families, staff, and support teams based on attendance thresholds, academic risk, missing documentation, or required actions.



Staff App for Parent and Teacher Interviews

A staff-facing app will support parent and teacher interview scheduling, availability management, meeting preparation notes, communication history, student context, follow-up actions, and outcomes tracking. The app will streamline coordination for teachers, administration staff, parents, guardians, and student support teams while maintaining appropriate access controls.

Industry Placement, Internships, and Work-Integrated Learning

d365Education will manage employer relationships, placement opportunities, student eligibility, placement matching, agreements, risk assessments, insurance requirements, supervisor details, learning objectives, attendance during placement, feedback, and completion outcomes. The process will support industry partners, academic coordinators, students, and compliance teams with a single source of truth for placement status and obligations.

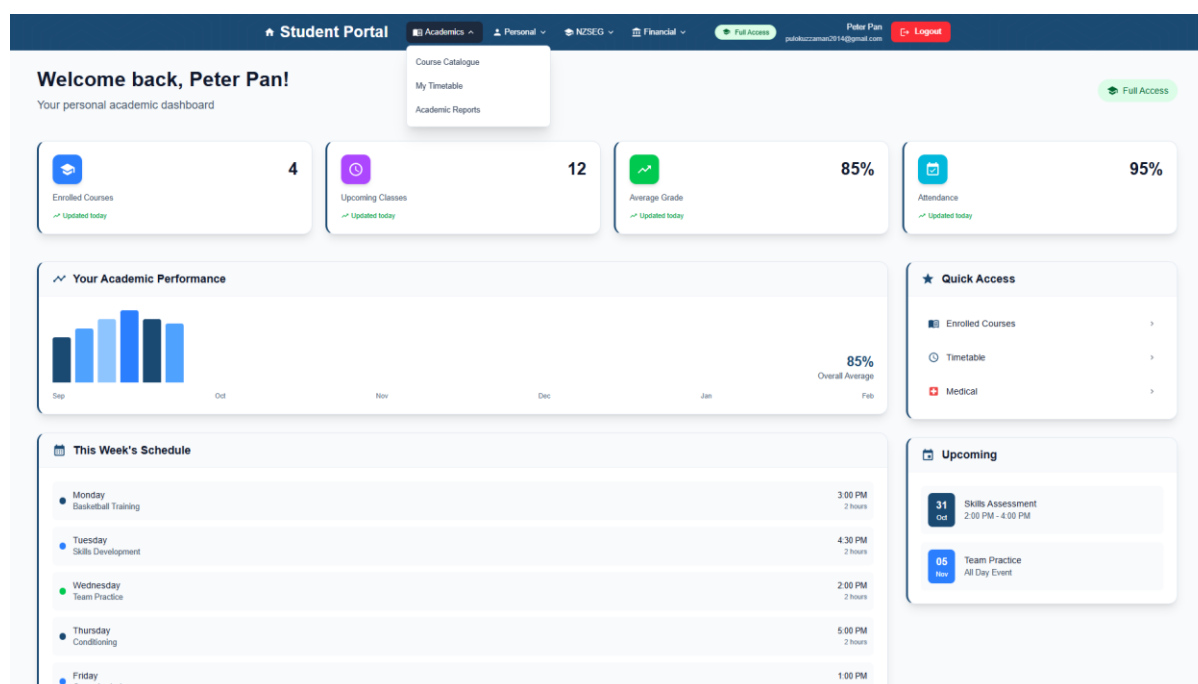
Alumni and Stakeholder Engagement

Alumni and stakeholder engagement will manage alumni records, career outcomes, mentoring programs, events, fundraising campaigns, employer networks, community

partnerships, and stakeholder communications. Segmented engagement journeys will support lifelong relationships, advocacy, donations, internships, employment pathways, and institutional reputation-building.

Self Service Portals for Students, Parents and Teachers

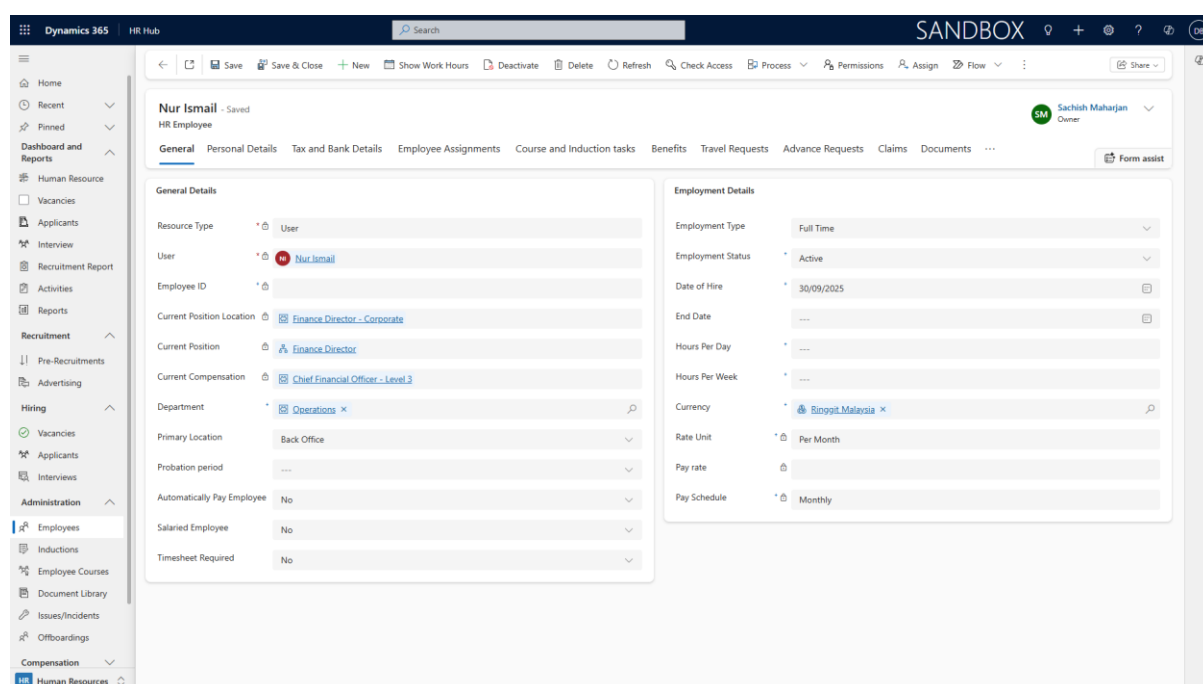
d365Education can provide modern self-service portal experiences for students, parents and teachers through secure, role-based web applications hosted in Microsoft Azure. Powered by Azure Web App Services and developed using Next.js and TypeScript, the portal delivers a responsive, intuitive user experience across devices while connecting directly to Microsoft Dataverse as the trusted backend for student, family, enrolment, timetable, communication, document and workflow data. Students can access personalised information such as schedules, learning activities, applications, service requests and status updates; parents can review and update student details, manage approvals, view communications, access reports, make bookings and engage with school services; and teachers can interact with class, student, attendance, assessment and pastoral information through streamlined digital workflows. By using Azure-hosted web apps with a Dataverse backend, d365Education extends Dynamics 365 beyond internal administration into a secure, scalable and user-friendly digital engagement layer for the whole school community.



HR Management for Staff and Contractors

HR management will maintain staff and contractor profiles, role assignments, onboarding tasks, qualifications, certifications, employment checks, training records, availability, contract terms, and compliance evidence. Integration with Microsoft 365

identity and security controls will support secure access, onboarding, offboarding, and role-based permissions across the education environment.



Business Central Finance for Schools

Business Central will provide the finance platform for school and education provider billing, fee schedules, fee matrix rules, family discounts, sibling discounts, scholarship adjustments, payment plans, split billing, debtor management, revenue recognition, general ledger integration, bank reconciliation, and financial reporting. Student enrolment and billing events from d365Education will drive finance transactions through controlled integration and approval processes.

Process Gaps, Fit-Gap Summary, and Prioritisation

Process Area	Fit-Gap Assessment	Priority	Recommended Action
Recruitment and enquiries	Strong fit with Dynamics 365 relationship, campaign, and case capabilities.	High	Configure lead, enquiry, campaign, consent, routing, and follow-up processes.
Applications, admissions, and enrolment	Partial fit requiring education-specific workflows, portals, forms, and document checks.	High	Design application stages, offer rules, compliance checks, and enrolment integration.
Student services, risk, and incidents	Strong platform fit with sensitive data, security,	High	Configure case categories, risk indicators, access

Process Area	Fit-Gap Assessment	Priority	Recommended Action
	and escalation design required.		controls, and intervention workflows.
Attendance and academic engagement	Partial fit depending on source systems and required attendance capture model.	High	Confirm attendance data sources, thresholds, alerts, and academic engagement metrics.
Finance for schools	Partial fit requiring fee matrix, discounts, split billing, and revenue recognition design.	High	Define finance integration architecture, fee rules, posting logic, and reconciliation controls.
Room allocation and interviews	Moderate fit using Power Apps, calendars, and booking workflows.	Medium	Confirm timetabling integration, capacity rules, booking exceptions, and staff app design.
Industry placement and alumni engagement	Strong fit for relationship management with education-specific workflows.	Medium	Configure employer, placement, alumni, event, and stakeholder engagement processes.
HR management for staff and contractors	Partial fit depending on existing HR systems and identity management requirements.	Medium	Define HR master data, compliance checks, onboarding, offboarding, and integration approach.

4 Application Strategy

The d365Education application strategy is to provide a modular, cloud-based education management platform that uses standard Microsoft business applications wherever possible and extends them through Dataverse, Power Apps, Power Automate, Power BI, Teams, SharePoint, Outlook, and Business Central. The strategy is to avoid building a standalone education system and instead deliver a connected student, staff, finance, engagement, compliance, and operations platform across the Microsoft cloud.

- **Fit-to-standard first:** Use native Dynamics 365, Business Central, Dataverse, and Power Platform capabilities before considering custom development.
- **Modular deployment:** Implement modules in manageable releases aligned to business value, readiness, and risk.
- **Single source of truth:** Establish Dataverse as the operational education data layer and Business Central as the financial system of record.
- **Role-based experiences:** Provide tailored views and apps for admissions, administration, teachers, faculty, finance, HR, executives, and support teams.
- **Secure by design:** Apply Microsoft identity, role-based security, auditability, data loss prevention, and governance controls from the start.
- **Continuous improvement:** Align solution enhancements with Microsoft release waves, d365Education product improvements, and institutional priorities.

Solution Overview

d365Education supports the full education lifecycle from first enquiry through application, enrolment, attendance, curriculum delivery, student management, staff management, risk and incident management, alumni engagement, and finance operations. It connects front-office engagement processes with back-office ERP and operational workflows so that institutions can manage relationships, compliance obligations, academic administration, and financial processes in one Microsoft ecosystem.

The solution is designed for phased implementation. Early releases typically focus on enquiries, applications, enrolment, student management, and core reporting. Later releases may add curriculum management, attendance automation, room allocation, advanced HR and recruitment, alumni engagement, incident management, integrations, mobile apps, analytics, and AI-enabled process assistance.

Microsoft Dynamics 365 Applications in Scope

Application	Role in d365Education
Dynamics 365 Sales	Supports enquiry management, recruitment pipelines, applications, stakeholder relationship management, and admissions engagement.
Dynamics 365 Customer Service	Supports student services, parent or guardian requests, case management, service queues, knowledge articles, and service-level management.
Dynamics 365 Customer Insights – Journeys	Supports personalised communications, campaigns, application nurturing, open days, alumni engagement, and automated journey communications.
Dynamics 365 for HR or HR-aligned Dataverse modules	Supports staff records, recruitment processes, onboarding, role management, HR cases, and workforce administration where required.
Dynamics 365 Business Central	Provides the ERP foundation for finance, procurement, budgeting, billing, receivables, payables, financial reporting, and operational accounting.
Dataverse-based d365Education modules leveraging Team Member based licensing	Provides the industry-specific education data model, functional modules, user experiences, workflows, and integrations.

Power Platform Components

- **Dataverse:** Core data platform for education entities, relationships, security roles, business rules, auditing, and integration patterns.
- **Model-driven Power Apps:** Primary administrative experience for admissions, student management, staff management, curriculum, risk, attendance, and operations.
- **Canvas Power Apps:** Mobile and task-focused experiences for teachers, attendance marking, incident capture, room checks, events, and approvals.
- **Power Automate:** Workflow automation for application approvals, enrolment confirmations, student communications, HR onboarding, incident triage, notifications, and integration orchestration.
- **Power BI:** Operational and executive reporting for enrolment trends, student attendance, recruitment funnel, financial performance, risk incidents, student engagement, and staff utilisation.

- **Azure Web App Service:** External portals for students, parents, guardians, alumni, staff applicants, and partner engagement where required.
- **Copilot Studio:** Conversational agents for admissions questions, student services, staff knowledge access, and guided support journeys subject to governance and licensing.

Microsoft 365 Integration

Microsoft 365 integration is central to the user experience and supports the “One Microsoft” operating model. Dynamics 365 and d365Education records will connect to productivity, collaboration, communication, document management, and identity services to reduce duplication and improve user adoption.

- **Microsoft Teams:** Collaboration spaces for admissions teams, student support, incident response, curriculum planning, and project delivery.
- **Outlook and Exchange:** Email tracking, appointments, communication history, interview scheduling, application follow-ups, and stakeholder correspondence.
- **SharePoint:** Document management for applications, student files, staff records, policies, risk documents, and controlled document libraries.
- **OneDrive:** Personal productivity storage for draft documents and working files, governed by institutional policies.
- **Microsoft Entra ID:** Identity, single sign-on, conditional access, security groups, and lifecycle access management.
- **Microsoft Purview:** Data governance, retention, sensitivity labels, audit, compliance, and information protection where adopted.
- **Microsoft Forms and Bookings:** Forms, surveys, interview booking, open day scheduling, and appointment capture where appropriate.

d365Education Functional Modules

Module	Blueprint Scope
Alumni	Manage alumni profiles, engagement history, campaigns, events, donations hand-off, mentoring, and lifelong relationship management.
Applications	Capture applicant details, supporting documents, assessment steps, interviews, offers, conditions, waitlists, and admissions decisions.
Attendance	Record attendance, absence reasons, late arrivals, notifications, trends, interventions, and attendance compliance reporting.

Module	Blueprint Scope
Business Central ERP, Finance for Schools	Manage finance, purchasing, receivables, payables, budgets, bank reconciliation, reporting, and financial controls.
Curriculum	Manage programs, courses, subjects, learning periods, course sections, curriculum requirements, and academic structures.
Enquiries	Track prospective student, parent, guardian, corporate, and partner enquiries from initial contact through conversion.
Enrolment	Manage enrolment offers, acceptance, student onboarding, class allocation, enrolment status, changes, withdrawals, and progression.
HR Management	Manage staff HR records, onboarding, employment details, compliance checks, leave-related workflow integration, and HR service cases.
Recruitment	Support student recruitment campaigns, open days, school engagement, corporate education sales, and applicant conversion management.
Risk and Incident Management	Record risks, incidents, actions, severity, investigations, escalations, outcomes, and compliance reporting.
Room Allocation and Seating Plan	Manage rooms, capacity, equipment, allocations, seating plans, accessibility needs, exams, and event scheduling support.
Staff Management	Maintain staff profiles, roles, faculty or department links, certifications, availability, teaching assignments, and operational responsibilities.
Student Management	Maintain student profiles, guardians, medical information, academic status, enrolment history, attendance, incidents, interventions, and communications.

Configuration versus Customisation Principles

The preferred design principle is to configure standard Microsoft and d365Education capabilities before creating custom components. Customisation is reserved for validated gaps that materially impact business outcomes, compliance, user adoption, or integration requirements and cannot be addressed through configuration, process change, or product roadmap timing.

- **Configuration first:** Use standard tables, forms, views, business rules, security roles, workflows, templates, and reporting where suitable.

- **Extend through supported patterns:** Use Power Platform, Dataverse, plug-ins, custom connectors, APIs, and managed solutions in a governed manner.
- **Avoid unsupported changes:** Do not modify platform behaviour in ways that create upgrade, performance, security, or support risks.
- **Document all gaps:** Maintain a fit-gap register with business rationale, solution options, risk, cost, ownership, and decision status.
- **Architectural review:** Require solution architect approval for custom tables, complex automation, integrations, security exceptions, and bespoke user experiences.
- **Upgrade awareness:** Validate customisations against Microsoft release waves, d365Education updates, dependency changes, and regression testing requirements.

Product Roadmap Alignment

d365Education should remain aligned with the Microsoft Dynamics 365, Power Platform, Business Central, Microsoft 365, and Dataverse roadmaps. Release planning will consider Microsoft release waves, environment update schedules, deprecations, new features, security enhancements, and education accelerator data model evolution. Roadmap alignment reduces technical debt and helps institutions adopt innovation without destabilising core operations.

- Review Microsoft release wave plans and d365Education product updates during each planning cycle.
- Assess new features for business value, licensing impact, security implications, and adoption readiness.
- Maintain a roadmap backlog covering functional enhancements, compliance changes, integrations, reporting, mobile experiences, and AI opportunities.
- Use sandbox environments to validate updates before production deployment.
- Communicate release impacts to business owners, administrators, trainers, and support teams.

Application Ownership and Support Model

The support model defines clear ownership between the institution, implementation partner, d365Education product team, Microsoft administrators, and Microsoft support channels. The model should distinguish between business ownership, platform administration, application configuration, integration support, data governance, training, and operational service management.

Role	Primary Responsibilities
Executive Sponsor	Owns strategic outcomes, investment decisions, prioritisation, and executive escalation.

Role	Primary Responsibilities
Business Product Owner	Owns business process design, backlog prioritisation, acceptance decisions, and user adoption.
Solution Architect	Owns solution integrity, design governance, integration patterns, data model alignment, and fit-to-standard decisions.
Application Administrator	Manages users, roles, configuration, environments, basic troubleshooting, release coordination, and support triage.
Data Owner	Owns data quality, privacy, retention, reporting definitions, migration validation, and master data governance.
Support Team	Provides first-line and second-line support, incident management, service requests, knowledge articles, and escalation management.
Implementation Partner or d365Education Product Team	Provides specialist configuration, development, integration, product support, release advice, and enhancement delivery.
Microsoft Support	Provides platform-level support for Microsoft cloud services under the applicable support agreements.

Key Blueprint Decisions and Next Steps

- Confirm the detailed module scope for the first release and subsequent release waves.
- Validate Dynamics 365 and Power Platform licensing assumptions for each user group.
- Review data model alignment with the Microsoft education data model and d365Education extensions.
- Define integration requirements for finance, learning management systems, identity, portals, communications, and reporting.
- Establish environment, ALM, testing, training, migration, security, and support strategies as follow-on Success by Design workstreams.
- Prepare for Solution Blueprint Review by documenting risks, assumptions, decisions, dependencies, and open design questions.

5 Solution Architecture

d365Education is designed as a Microsoft Dynamics 365 and Power Platform solution for education institutions that need a unified, secure, and extensible platform for student lifecycle management, engagement, administration, analytics, and operational collaboration. The Solution Blueprint follows Microsoft's Success by Design approach by validating the overall solution design early, identifying architectural risks, and aligning the implementation to product best practices, security, scalability, supportability, and long-term platform direction.

High-Level Solution Architecture

The high-level architecture is centred on Microsoft Dataverse as the secure business data platform, with Dynamics 365 model-driven applications, Power Apps, Power Automate, Power BI, Microsoft 365, and Azure integration services working together as a single Microsoft cloud ecosystem. d365Education provides configurable education-specific modules for prospective student engagement, admissions, enrolment, student services, academic administration, placements, alumni engagement, and stakeholder relationship management.

The solution architecture separates user experience, business process automation, integration, analytics, and governance layers so that the platform can evolve without unnecessary customisation. This layered architecture supports fit-to-standard configuration first, controlled extension where business value justifies it, reusable integration patterns, and governed application lifecycle management across development, test, user acceptance, training, and production environments.

Architecture Principles and Design Pillars

Design Pillar	Principle for d365Education
Business value alignment	Prioritise capabilities that improve student experience, operational efficiency, compliance, and institutional insight.
Fit-to-standard first	Use standard Dynamics 365, Dataverse, Power Platform, and Microsoft 365 capabilities wherever practical before extending the solution.
Security by design	Apply least privilege access, Microsoft Entra ID authentication, role-based security, data loss prevention, auditing, and compliance controls from the start.
Scalability and performance	Design data structures, integrations, automation, and reporting to support institutional growth, seasonal peaks, and high-volume student processes.

Design Pillar	Principle for d365Education
Integration-led architecture	Use governed integration patterns to connect student information systems, learning systems, finance, HR, marketing, identity, and portal services.
Data quality and stewardship	Establish ownership, validation, duplication controls, retention policies, and reporting-ready data models.
Evergreen cloud adoption	Keep the solution aligned to Microsoft's cloud roadmap, managed updates, and continuous improvement model.

Tenant, Environment, and Platform Overview

The target platform is deployed in the institution's Microsoft cloud tenant, using Microsoft Entra ID for identity, Power Platform environments for solution lifecycle separation, and Dataverse for operational data services. A recommended environment strategy includes Development, Test, User Acceptance Testing, Training, and Production, with controlled solution movement through managed and unmanaged solutions, environment variables, connection references, and automated deployment pipelines where appropriate.

Environment governance should define naming standards, administrative ownership, capacity monitoring, backup and restore approach, data residency, Power Platform licensing, connector controls, and support responsibilities. Separate environments reduce implementation risk by ensuring configuration, development, testing, training, and production activities are isolated and traceable.

Dataverse Architecture

Dataverse provides the core data model for d365Education. Key tables include accounts, contacts, students, applicants, guardians, schools, programs, courses, cohorts, applications, enrolments, cases, activities, communications, documents, placements, scholarships, events, and alumni relationships. The model should apply standard Dataverse capabilities such as relational tables, choices, business rules, calculated and rollup columns, auditing, duplicate detection, search, security roles, teams, and field-level security.

The Dataverse architecture should distinguish master data, transactional data, reference data, integration staging data, and analytical data. Data ownership and stewardship rules should be defined for each major entity group, especially where student records are exchanged with external student management, learning management, finance, or identity systems.

Identity, Access, and Authentication Model

Authentication is managed through Microsoft Entra ID, supporting single sign-on for staff, administrators, academic users, and authorised external users where applicable. Access is controlled through a layered model that combines Entra ID group membership, Dataverse security roles, business units, owner teams, access teams, field-level security, and Power Platform environment roles.

The security model should reflect education-specific responsibilities such as admissions officers, student services teams, faculty staff, placement coordinators, alumni officers, finance users, system administrators, and executive reporting users. Conditional access, multifactor authentication, privileged identity management, audit logging, and data loss prevention policies should be applied according to institutional risk and compliance requirements.

Integration Architecture

The integration architecture should provide reliable, secure, and supportable interfaces between d365Education and the wider education technology landscape. Common integration endpoints include student information systems, learning management systems, finance and billing systems, HR systems, marketing platforms, document management repositories, identity platforms, web portals, SMS/email providers, and external assessment or compliance services.

Recommended patterns include Power Automate for low-code workflow integration, Azure Logic Apps for enterprise orchestration, Azure Functions for custom services, Azure Service Bus for asynchronous messaging, Dataverse APIs for real-time integration, virtual tables where external data should be surfaced without replication, and Azure API Management for governed API exposure. Each integration should define ownership, data direction, frequency, error handling, monitoring, retry logic, security, and support procedures.

Analytics and Reporting Architecture

The analytics architecture provides operational reporting, management dashboards, executive insights, and institutional performance analysis. Dynamics 365 views, charts, dashboards, and model-driven app reporting should support day-to-day users, while Power BI should provide governed analytics across admissions pipelines, enrolment trends, student engagement, case management, retention risk, placement outcomes, alumni engagement, and service performance.

For advanced reporting, the architecture may use Microsoft Fabric, Azure Synapse Link for Dataverse, dataflows, or lakehouse patterns to combine Dataverse data with finance, learning, HR, and external data sources. Reporting governance should define

certified datasets, refresh schedules, row-level security, data definitions, KPI ownership, and retention policies so that analytics outputs are trusted and repeatable.

Non-Functional Requirements

Requirement Area	Blueprint Requirement
Availability	The solution must support critical education administration processes during business hours and key enrolment periods, with clear continuity and support arrangements.
Performance	Core forms, views, workflows, reports, and integrations must be designed and tested for expected user volumes, data volumes, and seasonal peaks.
Security and privacy	Student, guardian, staff, and institutional data must be protected through role-based access, auditing, encryption, conditional access, and privacy-aware data handling.
Scalability	The architecture must support growth in students, programs, campuses, departments, users, integrations, and reporting volumes.
Maintainability	Configuration and customisation must follow documented standards, solution layering, naming conventions, deployment controls, and support documentation.
Compliance	The solution must align with institutional policies, education-sector obligations, records retention, accessibility, audit, and applicable privacy requirements.
Usability and adoption	User experience must be role-based, task-focused, accessible, and supported by training, embedded guidance, and change management materials.
Monitoring and support	Platform health, integrations, automation, storage, security events, and service performance must be monitored with clear escalation and incident management processes.

6 Data Strategy Overview

The Data Strategy for d365Education defines how institutional, academic, learner, engagement, operational, and compliance data will be structured, governed, migrated, secured, retained, and used across the solution lifecycle. In line with Microsoft Success by Design, the strategy is intended to reduce implementation risk, establish clear data ownership, validate data readiness early, and ensure the solution remains scalable, supportable, and aligned with Microsoft Dynamics 365 and Microsoft Dataverse best practices.

Education Data Model Overview

d365Education uses Microsoft Dataverse as the core transactional data platform. The data model provides education-specific structures for students, schools, staff, faculty, courses, programs, enrolments, attendance, assessments, scholarships, grants, internships, accomplishments, and related learner lifecycle information. It combines custom education tables, enriched Dataverse tables, and flexible connection records that support a holistic view of the student and their relationships with programs, institutions, educators, guardians, advisors, and support services.

The model supports both higher education and K–12 scenarios, while allowing d365Education to extend the Microsoft baseline with additional tables, columns, business rules, security roles, calculated fields, and integration mappings required by each institution. The target architecture will avoid unnecessary duplication of source-system data and will establish Dataverse as the system of engagement and education process orchestration layer, while respecting authoritative systems of record for finance, identity, learning management, student information, and document management where applicable.

Student, Course, Program, and Institution Data Structures

Data Domain	Core Structures	Purpose in d365Education
Student / Learner	Contact, student profile, student status, characteristics, previous education, accomplishments, assessments, accommodations, language preferences, enrolments, and student resources.	Provides a single learner view across recruitment, admissions, enrolment, engagement, wellbeing, progression, graduation, alumni, and support services.
Course and Course Section	Course, course requirement, course section, academic subject, learning standard, assessment,	Supports curriculum management, teaching delivery, course enrolment, attendance tracking,

Data Domain	Core Structures	Purpose in d365Education
	attendance, assignment, and grade scale structures.	assessment activity, and academic pathway visibility.
Program	Program, program version, program version detail, program enrolment, program requirement, program/grade level, registration status, and student program type.	Manages program offerings, learner participation, progression rules, eligibility, requirements, registration, and completion tracking.
Institution / School	Account, school, school calendar, school calendar date, academic period, grading period, bell schedule, institution hierarchy, address, and external identifiers.	Represents the education provider, campuses, faculties, departments, schools, calendars, organisational hierarchy, and operational structures.
Relationships and Connections	Dataverse connections, account/contact relationships, staff/faculty links, guardian relationships, advisor assignments, cohort memberships, and external system identifiers.	Enables flexible modelling of student support networks, faculty relationships, institutional affiliations, and source-system traceability.

Data Ownership and Stewardship

Data ownership will be assigned by business domain rather than by system alone. Each major data domain will have an accountable business owner, one or more operational data stewards, and a technical custodian. Business owners define meaning, quality expectations, retention requirements, access expectations, and approval rules. Data stewards maintain data definitions, review exceptions, manage duplicate resolution, and confirm migration readiness. Technical custodians implement Dataverse configuration, integrations, security, audit settings, and monitoring controls.

Data Domain	Business Owner	Stewardship Responsibilities
Student and learner profile	Registrar, student services, or enrolment leadership.	Maintain learner identity rules, profile completeness, duplicate prevention, student lifecycle status definitions, and sensitive data handling.
Programs and curriculum	Academic administration or curriculum governance.	Maintain program versions, course requirements, academic periods, eligibility rules, and approved curriculum structures.

Data Domain	Business Owner	Stewardship Responsibilities
Institution and organisational data	Institution administration or operations leadership.	Maintain school, campus, faculty, department, hierarchy, calendar, and location reference data.
Compliance and retention	Privacy, records management, legal, or compliance leadership.	Define retention schedules, consent rules, archival policies, audit requirements, and regulatory controls.

Data Quality and Cleansing Approach

The data quality approach will begin during discovery and continue through build, migration rehearsal, user acceptance testing, go-live, and operations. Quality rules will be documented for each priority data domain, including mandatory fields, valid value lists, relationship integrity, duplicate matching, naming standards, date validity, status logic, historical completeness, and personally identifiable information controls. Cleansing will be performed as close to the source as practical, with exceptions tracked in a data readiness register.

- Profile source-system extracts to identify duplicates, missing values, obsolete records, invalid references, and inconsistent coding.
- Define cleansing rules for learner identity, course codes, program names, academic periods, institution hierarchy, addresses, contact details, and status fields.
- Establish matching and merge rules for student, guardian, staff, faculty, employer, and institution records.
- Validate reference data before transactional data migration to avoid orphaned enrolments, course sections, programs, and assessments.
- Use migration rehearsals to measure data quality improvement and to confirm that cleansing remediation is complete before go-live.

Data Migration Scope and Strategy

The Data Migration Strategy will be managed as a dedicated Success by Design workstream. The scope will prioritise data required to operate d365Education at go-live, support statutory and institutional reporting, preserve learner history needed by frontline users, and provide sufficient context for student engagement, case management, registration, and academic support processes.

The recommended migration approach is phased and rehearsal-driven. Foundation reference data will be loaded first, followed by master records, relationship records, and then transactional or historical records. Each rehearsal will include extract

validation, transformation checks, target-load validation, reconciliation reporting, security review, user validation, and defect remediation. Final cutover will include a migration freeze window, incremental delta loads where required, business sign-off, and a rollback or contingency approach for material defects.

Migration Category	Typical Scope	Strategy
Reference data	Academic periods, grading periods, subjects, course codes, program types, statuses, calendars, locations, and institution hierarchy.	Load early, govern centrally, freeze changes before cutover, and validate with business stewards.
Master data	Students, contacts, accounts, schools, staff, faculty, programs, courses, and external identifiers.	Cleanse, deduplicate, standardise identifiers, and reconcile record counts and key attributes.
Relationship data	Student-program, student-course, guardian-student, advisor-student, course-section, school-enrolment, and organisational relationships.	Load after master data and validate referential integrity, relationship types, dates, and status values.
Historical and transactional data	Prior enrolments, assessments, attendance, incidents, achievements, support cases, scholarship applications, grants, and communications history.	Migrate only where required for business continuity, compliance, analytics, or user context; archive the remainder.

Dataverse Tables, Relationships, and Reference Data

d365Education will use a structured Dataverse table design that separates core master data, operational process data, reference data, and integration control data. Table customisation will follow the principle of configuration before customisation, using standard Dataverse tables and Microsoft education data model tables where they meet requirements, and introducing custom tables only where there is a clear business need that cannot be satisfied through configuration, relationships, choices, calculated fields, or business rules.

- **Core tables:** Contact, Account, Student Profile, School, Program, Program Version, Course, Course Section, Academic Period, Program Enrolment, Course Enrolment, Assessment, Attendance, Student Status, and External System Identifier.
- **Relationship patterns:** one-to-many relationships for institutional hierarchy, many-to-many relationship tables for enrolments and program/course

participation, Dataverse connections for flexible stakeholder relationships, and lookup relationships for controlled references.

- **Reference data:** centralised choices and reference tables for status, registration type, academic level, subject, institution type, delivery mode, grade scale, calendar, location, language, accommodation type, and lifecycle stage.
- **Integration control:** external identifiers, source-system keys, synchronisation timestamps, ownership flags, error logs, and reconciliation fields to support integration traceability and operational support.

Master Data Management

The Master Data Management approach will define which system is authoritative for each master data domain and how d365Education consumes, enriches, or synchronises that data. The solution will apply clear survivorship rules, ownership flags, duplicate detection, approval workflows, and change control so that student, program, course, institution, and contact data remains trusted across the solution landscape.

Master Data Area	Authoritative Source	d365Education Responsibility
Student identity and demographic profile	Student information system, identity platform, or institutional master record.	Consume and enrich for engagement, support, communications, case management, and student lifecycle tracking.
Program and curriculum catalogue	Academic administration, curriculum management, or student information system.	Use approved program and course structures to support registration, engagement, progression, and advisory processes.
Institution hierarchy and locations	Institution administration, HR, finance, or enterprise master data service.	Represent schools, campuses, faculties, departments, calendars, and locations for process routing, reporting, and security segmentation.
Reference values and controlled vocabularies	Data governance board or nominated business owners.	Maintain controlled Dataverse reference data and ensure integrations use agreed mappings.

Data Retention, Archiving, and Compliance

Data retention and archiving will be designed to meet institutional policy, privacy obligations, records management requirements, and jurisdiction-specific regulations. Retention rules will distinguish between active operational records, records required for

student services or academic administration, historical records required for audit or statutory reporting, and records that should be archived or deleted under approved schedules. The solution will use Dataverse security, auditing, field-level controls, role-based access, retention classification, and integration with Microsoft 365 and Azure services where required to support compliance.

- Define retention schedules by data domain, record type, jurisdiction, learner status, and compliance obligation.
- Classify sensitive education data, including personal information, health or wellbeing indicators, accommodations, assessment outcomes, disciplinary records, and support interactions.
- Apply least-privilege access, audit logging, field-level security, and environment governance for sensitive and regulated data.
- Archive inactive records to approved repositories while preserving searchability, legal hold capability, and reporting continuity where required.
- Document deletion, anonymisation, and archival procedures as part of operational runbooks and post-go-live governance.

Success by Design Review Considerations

During the Solution Blueprint Review, the project team should validate that the data strategy is complete, realistic, and aligned to the delivery plan. Key review questions include whether each data domain has an owner, whether migration scope is defined, whether data quality risks are understood, whether Dataverse table design avoids unnecessary customisation, whether source-system ownership is clear, whether reference data governance is agreed, and whether retention and compliance requirements have been translated into enforceable solution controls.

7 Integration Strategy

The integration strategy for d365Education establishes the architectural approach for connecting Microsoft Dynamics 365, Microsoft Dataverse, Power Platform, Microsoft 365, and external education systems into a coherent, governed, and supportable solution. Aligned with Microsoft's Success by Design methodology, the strategy focuses on early risk identification, clear ownership of integration patterns, validation of non-functional requirements, and repeatable design decisions that support scalability, security, performance, and long-term operability.

Integration Principles

- **Dataverse as the education engagement data foundation:** d365Education will use Microsoft Dataverse and the education data model as the primary foundation for student, school, staff, enrolment, attendance, activity, and engagement data where appropriate.
- **System of record clarity:** each major data domain will have a clearly nominated master system, such as the Student Management System for core student academic records or the finance system for billing and ledger transactions.
- **API-first integration:** integrations will prefer secure, documented APIs and event-based patterns over direct database access or manual file exchange.
- **Security by design:** all interfaces will apply least-privilege access, Microsoft Entra ID authentication where available, secure secret management, encryption in transit, and auditable service accounts.
- **Resilience and supportability:** integrations will include retry, exception logging, reconciliation, and alerting patterns so that operational teams can detect and resolve issues quickly.
- **Minimal duplication:** d365Education will avoid unnecessary replication of full external system data sets and will synchronise only the data required for education workflows, reporting, automation, and user experience.
- **Scalable automation:** Power Automate, Azure integration services, and approved middleware will be used according to volume, complexity, latency, and governance requirements.

Systems in Scope

System Area	Typical Systems	Integration Purpose
Student Management	SIS, admissions, enrolment, attendance, timetable, academic records	Maintain student lifecycle, enrolment, class, attendance, wellbeing, and academic information.

System Area	Typical Systems	Integration Purpose
Learning Management	LMS platforms such as Canvas, Moodle, Blackboard, Schoology, or Microsoft learning tools	Synchronise courses, classes, assignments, progress, learning activity, and engagement insights.
Finance and ERP	Dynamics 365 Business Central, KeyPay/EH payroll, procurement, billing, payment gateways	Support fees, invoicing, receipting, scholarships, grants, financial reporting, and operational controls.
Microsoft 365	Teams, Outlook, SharePoint, Exchange, Microsoft Graph	Enable collaboration, communications, documents, activities, notifications, and productivity workflows.
Azure Web App External Portals	Parent portals, student portals, applicant portals, alumni portals, government portals	Provide secure self-service access and controlled submission of applications, updates, forms, and requests.
Analytics and Reporting	Power BI, Microsoft Fabric, data warehouse, institutional reporting platforms	Provide trusted reporting, institutional intelligence, compliance outputs, and student success analytics.

Student Management System Integration

The Student Management System integration will connect d365Education with the institution's authoritative source for students, enrolments, courses, classes, timetable, attendance, academic status, guardians, and key student attributes. The integration design will define the system of record for each entity and whether data is synchronised one-way, two-way, event-driven, or on a scheduled basis. Common scenarios include applicant-to-student conversion, enrolment updates, class placement, attendance capture, student profile updates, status changes, and controlled access to student records by staff.

Learning Management System Integration

The Learning Management System integration will support teaching, learning, and student engagement processes by exchanging relevant course, class, assignment, assessment, and learner activity information. d365Education will not duplicate the full LMS experience; instead, it will surface the information needed for student engagement, intervention workflows, staff follow-up, parent or guardian communications, and institutional reporting. Integration patterns may include scheduled synchronisation of courses and enrolments, event-based notifications for

assignment submission or non-engagement, and analytics feeds into Power BI or Microsoft Fabric.

Finance and ERP Integration

Finance and ERP integration will connect d365Education with the institution's financial platform for fee billing, payment status, scholarships, grants, procurement, and financial reporting. The finance system will remain the system of record for ledger, tax, payment allocation, receipting, and statutory financial reporting, while d365Education may expose selected financial indicators to authorised student services, admissions, finance, or leadership users. Integration controls will include reconciliation of student account balances, validation of billing triggers, secure handling of payment references, and separation of duties between operational student workflows and accounting processes.

Microsoft Teams, Outlook, and SharePoint Integration

d365Education will apply a "One Microsoft" collaboration model by integrating Dynamics 365 with Microsoft Teams, Outlook, and SharePoint. Outlook integration will support activity tracking, appointment management, email communications, and staff productivity. Teams integration will support collaboration around students, classes, cases, interventions, and project workspaces, with governance for team creation and membership. SharePoint will provide document storage for student records, enrolment documents, policies, forms, templates, and controlled collaboration files, with metadata and security inherited or aligned to Dataverse where appropriate.

Third-Party and External Portal Integrations

Third-party and external portal integrations will provide secure channels for parents, guardians, applicants, students, alumni, agencies, payment providers, government services, and other approved stakeholders. Portal scenarios may include enrolment applications, event registrations, forms, consent management, document upload, case requests, scholarship applications, and profile updates. Integration with external services will be assessed against security, privacy, consent, data residency, rate limit, audit, and operational support requirements before implementation.

API, Middleware, and Power Automate Approach

The integration approach will use the most appropriate pattern for each interface based on data volume, complexity, frequency, reliability, and support requirements. Power Automate will be used for low-to-medium complexity workflow automation, notifications, approvals, and service orchestration where connectors are available and governance requirements can be met. Azure Logic Apps, Azure Functions, Azure Service Bus, Azure API Management, and approved middleware may be used for higher-

volume, event-driven, reusable, or enterprise-grade integration patterns. Direct database integrations will be avoided unless formally approved as an exception.

Integration Monitoring and Error Handling

Integration monitoring and error handling will be designed as part of the solution blueprint rather than treated as an operational afterthought. Each integration will define logging requirements, retry behaviour, exception queues, alerting rules, owner responsibilities, and reconciliation checks. Operational dashboards will show interface health, transaction volumes, failed messages, latency, and unresolved exceptions. Support teams will receive clear runbooks covering common failure scenarios, escalation paths, data correction procedures, and service-level expectations.

8 Security Strategy Overview

The security strategy for d365Education is designed to support a secure, scalable, and compliant Microsoft Dynamics 365 platform for education providers. Consistent with Microsoft's Success by Design approach, the security model should be reviewed early in the Solution Blueprint stage to validate that the design supports business processes, data protection obligations, operational governance, and long-term maintainability.

The security architecture must balance accessibility for students, staff, faculty, and administrators with strict controls over sensitive student information, academic records, financial data, health and wellbeing information, and institutional reporting. The model should be simple enough to administer, yet robust enough to support institutional structures such as schools, faculties, campuses, departments, programs, and shared service teams.

Security Principles and Compliance Requirements

- **Least privilege access:** Users are granted only the permissions required to perform their role, with elevated privileges reserved for approved administrative functions.
- **Separation of duties:** Security roles should prevent inappropriate combinations of access, such as the same user approving admissions exceptions and maintaining fee or compliance settings without oversight.
- **Privacy by design:** Student and staff information is protected from the start of the design process through role design, field-level controls, auditing, retention policies, and consent management.
- **Secure collaboration:** Teams, queues, and shared ownership models should enable cross-functional student support while avoiding uncontrolled access to confidential records.
- **Compliance alignment:** The solution should align with applicable education, privacy, data protection, accessibility, records management, and sector-specific regulatory obligations in each operating jurisdiction.
- **Maintainability and scalability:** Security configuration should be documented, repeatable across environments, and designed to support future campuses, programs, departments, and regulatory changes.

Role-Based Security Model

d365Education should use a role-based security model built on Microsoft Dataverse and Dynamics 365 security capabilities. Security roles should be mapped to business functions rather than individual users, enabling centralised governance and simpler administration.

Role Category	Typical Responsibilities	Access Scope
Student Services	Admissions support, enrolment assistance, student enquiries, case management, and service requests.	Read and update access to assigned student records, cases, communications, and enrolment-related activities.
Academic Faculty	Teaching delivery, academic advising, assessment review, progression monitoring, and student engagement.	Access to students, classes, programs, activities, and academic information relevant to assigned teaching or advising responsibilities.
Program Administration	Program setup, course management, timetable coordination, academic rules, and progression administration.	Access to program, course, unit, cohort, and related configuration records within the applicable faculty or department.
Finance and Fees	Fee assessment, sponsorships, scholarships, billing coordination, refunds, and financial holds.	Access to finance-related records and limited student profile information required for billing and reconciliation.
Wellbeing and Safeguarding	Student wellbeing, support plans, risk alerts, accessibility accommodations, and sensitive case management.	Restricted access to highly sensitive records, controlled through specialist roles, teams, and field-level security.
System Administrator	Platform configuration, environment management, security administration, integration monitoring, and release support.	Elevated technical access governed by privileged access processes, auditing, and approval controls.

Student, Staff, Faculty, and Administrator Access

- **Students:** Access should primarily be delivered through student portals, mobile experiences, or approved app interfaces. Students should only access their own profile, applications, enrolments, cases, communications, appointments, documents, and consent preferences.
- **Staff:** Administrative staff should access student and operational data according to their role, department, campus, and service responsibilities. Access should be limited through business units, owner teams, access teams, and record sharing where appropriate.
- **Faculty:** Faculty members should access academic and engagement data for assigned classes, cohorts, advisees, and programs. Faculty access should not

automatically include sensitive wellbeing, conduct, disability, or financial information unless required and approved.

- **Administrators:** Functional and technical administrators should have clearly separated duties. Configuration, integration, security, and environment administration should be assigned to approved administrator roles and monitored through audit logs and privileged access reviews.

Business Units, Teams, and Ownership Model

The d365Education ownership model should reflect the institution's operating structure while avoiding excessive complexity. Business units may represent major organisational boundaries such as institution, campus, faculty, school, department, or shared services. Teams should be used to support collaboration across these structures without duplicating roles or creating unnecessary security exceptions.

- **Business units:** Used where there is a clear need for hierarchical data segregation, such as campus, faculty, or regional operating models.
- **Owner teams:** Used where records are managed by a functional group, such as Admissions, Student Services, International Office, Wellbeing, or Faculty Administration.
- **Access teams:** Used for ad hoc collaboration on specific records, such as complex student cases or cross-functional support scenarios.
- **Record ownership:** Standard records should be owned by users or teams based on business process accountability. Sensitive records should generally be owned by restricted teams rather than individual users.
- **Sharing rules:** Manual sharing should be minimised and governed by policy. Where recurring collaboration is required, teams and security roles should be preferred.

Field-Level Security and Sensitive Data Controls

Field-level security should be applied to sensitive information that should not be visible to all users with access to the parent record. This includes health information, disability and accessibility adjustments, safeguarding alerts, conduct matters, financial hardship, emergency contacts, visa and citizenship details, identity documents, demographic attributes, and consent preferences.

- Define a sensitive data register identifying protected fields, tables, owners, access roles, retention requirements, and audit expectations.
- Use field security profiles to restrict read, update, and create permissions for highly sensitive fields.
- Use separate tables for highly confidential case types where table-level security is more appropriate than field masking alone.

- Protect attachments and documents using Microsoft 365, SharePoint, sensitivity labels, retention policies, and appropriate document location security.
- Apply data loss prevention policies across Power Platform environments to reduce the risk of accidental disclosure or unauthorised connector use.

Microsoft Entra ID Authentication

Authentication for d365Education should be based on Microsoft Entra ID as the identity provider for staff, faculty, administrators, and approved external users. Identity controls should be aligned with institutional identity lifecycle management, including joiner, mover, leaver, guest access, and privileged access processes.

- Use single sign-on with Microsoft Entra ID for Dynamics 365, Power Platform, and Microsoft 365 workloads.
- Apply conditional access policies for location, device compliance, risk-based sign-in, and multifactor authentication.
- Use security groups to assign licensed users and manage access to environments, model-driven apps, and role membership where appropriate.
- Use privileged identity management for elevated administrative roles and time-bound access approval.
- For external stakeholders such as agents, parents, sponsors, employers, or placement supervisors, use controlled external identity patterns such as guest access or portal authentication depending on business requirements.

Audit, Logging, and Monitoring

Audit and monitoring controls should provide visibility into access, data changes, security administration, integration activity, and operational exceptions. The audit design should identify what must be tracked, who reviews the logs, how long records are retained, and how incidents are escalated.

- Enable Dataverse auditing for key tables and fields, including student profile records, enrolments, cases, sensitive support records, financial fields, and consent attributes.
- Monitor administrative changes to security roles, teams, business units, field security profiles, environment settings, and integrations.
- Use Microsoft Purview, Microsoft Entra sign-in logs, Power Platform admin centre analytics, and Microsoft Defender capabilities where applicable for broader monitoring and compliance oversight.
- Define exception reporting for unusual access patterns, bulk exports, failed integrations, privileged access use, and high-risk data changes.
- Establish an operational review cadence for audit reports, access reviews, and compliance evidence.

Privacy, Consent, and Regulatory Considerations

d365Education supports privacy and consent management requirements across the student lifecycle. The solution should capture lawful basis, communication preferences, consent history, parent or guardian permissions where applicable, accessibility accommodations, data retention status, and disclosure restrictions. Privacy controls must be designed in partnership with institutional legal, compliance, records management, and information security stakeholders.

- Map applicable regulatory obligations by jurisdiction, including student privacy, data protection, child safety, accessibility, records retention, and international student compliance requirements.
- Document consent capture, withdrawal, expiry, and evidence requirements for student communications, marketing, data sharing, placements, guardianship, and support services.
- Apply retention and disposal policies to student records, applications, cases, communications, and supporting documents.
- Design role-based access and audit controls for sensitive disclosure scenarios, including wellbeing, safeguarding, complaints, academic misconduct, disability support, and financial hardship.
- Ensure reporting and analytics datasets are governed so that sensitive data is minimised, anonymised, aggregated, or restricted where appropriate.

Success by Design Review Questions

- Has the security model been validated against end-to-end student lifecycle processes?
- Are business units and teams aligned to the institution's operating model without introducing unnecessary complexity?
- Are student, staff, faculty, and administrator access patterns clearly documented and tested?
- Are sensitive fields and confidential case types protected using field-level security, restricted tables, or specialist teams?
- Are Microsoft Entra ID, conditional access, multifactor authentication, and privileged access controls defined?
- Are audit, monitoring, incident response, and compliance evidence processes operationally owned?
- Have privacy, consent, retention, and jurisdiction-specific regulatory requirements been mapped to the solution design?

9 Intelligence, Reporting, and Analytics Strategy

The intelligence, reporting, and analytics strategy for d365Education is designed in accordance with Microsoft's Success by Design guidance, which treats intelligence strategy as a core solution architecture pillar and aligns reporting requirements with business processes, data strategy, security, and the wider implementation roadmap. The purpose of this strategy is to ensure that Microsoft Dynamics 365 for Education, Microsoft Dataverse, Power BI, Microsoft Fabric where required, and AI-enabled capabilities provide trusted, role-based insight across the full education lifecycle.

The strategy supports the d365Education objective of providing educational institutions with a single, governed platform for recruitment, admissions, enrolment, student engagement, service delivery, programme administration, case management, communications, and executive decision-making. It moves reporting from manually compiled spreadsheets and fragmented departmental extracts toward a governed analytics operating model based on shared data definitions, operational dashboards, embedded Dynamics 365 views, Power BI semantic models, and actionable AI-assisted insights.

Reporting Objectives and Audiences

The primary reporting objective is to provide each stakeholder group with accurate, timely, and relevant information required to manage student outcomes, operational performance, compliance, and institutional growth. Reporting should be designed around business decisions and intervention points, not merely around data availability.

Audience	Primary Reporting Needs	Typical Decisions Supported
Executive leadership	Institution-wide KPIs, enrolment trends, retention, service performance, revenue indicators, risk exposure, and strategic outcomes.	Strategic planning, investment prioritisation, performance management, and board reporting.
Admissions and recruitment teams	Enquiry volumes, lead sources, application status, conversion rates, agent performance, offer acceptance, and enrolment pipeline.	Campaign targeting, follow-up prioritisation, agent management, and capacity planning.
Student services and case teams	Open cases, service demand, SLA performance, escalations, student wellbeing indicators, and support outcomes.	Workload balancing, early intervention, escalation management, and service improvement.

Audience	Primary Reporting Needs	Typical Decisions Supported
Academic and programme teams	Attendance, participation, progression, assessment status, completion, course performance, and cohort trends.	Teaching support, academic intervention, programme improvement, and resource allocation.
Finance and operations	Fee status, invoicing readiness, payment exceptions, programme revenue, refunds, and integration exceptions.	Revenue assurance, reconciliation, exception follow-up, and operational controls.
Compliance, governance, and data owners	Data quality, access controls, audit status, consent, retention indicators, and regulated reporting extracts.	Compliance assurance, audit preparation, privacy management, and data stewardship.

Operational Dashboards

Operational dashboards should be embedded within Dynamics 365 model-driven apps wherever users need day-to-day queue management, task prioritisation, exception handling, and process visibility. These dashboards should use Dataverse views, charts, Power BI embedded reports, and role-specific workspaces to provide actionable visibility without forcing users to leave their primary application.

- **Admissions operations dashboard:** enquiry volumes, open applications, stage ageing, missing documents, eligibility checks, offer status, and enrolment conversion.
- **Student services dashboard:** open support cases, priority cases, SLA breaches, escalations, communication backlog, and student risk indicators.
- **Programme operations dashboard:** cohort status, attendance, course participation, assessment completion, timetable exceptions, and progression alerts.
- **Finance readiness dashboard:** enrolment records pending billing, fee status, payment exceptions, split billing issues, refund cases, and Business Central integration errors.
- **Data quality dashboard:** duplicate records, incomplete student profiles, invalid programme links, missing consent records, and integration reconciliation exceptions.

Each dashboard should define ownership, refresh frequency, source data, security model, and agreed usage expectations. This ensures that operational reporting becomes part of the management rhythm and supports accountable service delivery.

Student Engagement and Retention Analytics

Student engagement and retention analytics provide an evidence-based view of how students interact with the institution across recruitment, onboarding, learning, support, communication, and alumni stages. The objective is to identify patterns that may indicate disengagement, service friction, or retention risk early enough for staff to intervene.

- Engagement indicators should include portal logins, communication responses, event participation, attendance, learning activity, case interactions, survey feedback, and outstanding tasks.
- Retention indicators should include attendance decline, repeated non-response, unresolved support cases, payment or documentation issues, low participation, course withdrawal signals, and progression delays.
- Dashboards should allow analysis by cohort, programme, campus, year level, demographic segment where permitted, agent source, engagement channel, and intervention outcome.
- Retention reporting should provide trend analysis, not only point-in-time status, so that teams can measure whether interventions improve continuation, completion, and student satisfaction.

Admissions Pipeline and Enrolment Reporting

Admissions pipeline and enrolment reporting should provide a complete view from first enquiry through application, assessment, offer, acceptance, enrolment, and onboarding. Reporting should align with the configured business process flows in Dynamics 365 so that stage movement, bottlenecks, and conversion rates are visible and measurable.

Reporting Area	Example Measures
Lead and enquiry management	Lead source, campaign performance, agent contribution, enquiry volume, response time, and enquiry-to-application conversion.
Application processing	Applications by programme, status, stage ageing, missing documentation, assessment outcome, and approval cycle time.
Offer and acceptance	Offers issued, offers accepted, declined offers, acceptance rate, offer ageing, and follow-up status.
Enrolment and onboarding	Enrolments completed, enrolments pending, portal account activation, document completion, orientation readiness, and provisioning status.

Reporting Area	Example Measures
Agent and partner performance	Applications submitted, conversion rate, quality of submissions, time to completion, and contribution by programme or region.

Case Management and Service Performance Reporting

Case management reporting should provide visibility into service demand, service quality, risk, workload, and student experience. Dynamics 365 Customer Service capabilities and d365Education case structures can support student support, administrative enquiries, complaints, wellbeing referrals, policy exceptions, finance queries, academic requests, and operational incidents.

- **Volume and demand:** cases opened, closed, reopened, by category, programme, campus, cohort, channel, and priority.
- **Timeliness:** average response time, resolution time, SLA achievement, ageing, and overdue actions.
- **Quality and outcomes:** resolution reason, satisfaction feedback, escalation rate, first-contact resolution, and repeat contact rate.
- **Risk and intervention:** high-priority student cases, wellbeing indicators, escalation patterns, regulatory or safeguarding flags, and intervention outcomes.
- **Operational workload:** owner workload, team capacity, queue performance, reassignment frequency, and backlog trends.

Power BI Architecture

The Power BI architecture should provide a governed reporting layer that supports operational, tactical, and strategic analytics while respecting Dataverse security, data classification, and institutional governance requirements. The recommended architecture is layered to separate source systems, integration, curated analytics models, and presentation reports.

1. **Source layer:** Dynamics 365 and Dataverse for student, admissions, service, programme, communications, and configuration data; Business Central or finance systems for billing and payment data; external student information, learning, identity, portal, and marketing systems where required.
2. **Integration and data movement layer:** Dataverse direct reporting, Azure Synapse Link for Dataverse, dataflows, Fabric pipelines, or approved integration services depending on data volume, latency, and transformation requirements.
3. **Curated data layer:** governed datasets, semantic models, conformed dimensions, calculated measures, certified datasets, and standard KPI definitions aligned to the institutional data dictionary.

4. **Reporting and consumption layer:** Power BI workspaces, apps, embedded Power BI reports in Dynamics 365, executive dashboards, paginated reports, operational scorecards, and self-service analytics where appropriate.
5. **Governance and monitoring layer:** workspace ownership, deployment pipelines, access reviews, sensitivity labels, usage monitoring, refresh monitoring, change control, and report certification.

AI and Copilot Opportunities

AI and Copilot capabilities should be introduced through controlled, high-value use cases that improve productivity, insight, personalisation, and student outcomes while maintaining human oversight and responsible AI governance. Priority opportunities include:

- **Admissions assistance:** summarising applicant records, identifying missing documents, recommending next actions, drafting applicant communications, and highlighting applications at risk of delay.
- **Student engagement insights:** surfacing students with declining engagement, summarising interaction history, suggesting intervention actions, and supporting targeted communication journeys.
- **Case management productivity:** summarising case history, drafting responses, recommending knowledge articles, identifying escalation patterns, and supporting service quality reviews.
- **Executive insight generation:** natural language exploration of Power BI datasets, narrative summaries of KPI trends, anomaly detection, and scenario analysis for enrolment and retention planning.
- **Staff productivity:** meeting preparation, action item extraction, email drafting, Teams collaboration summaries, and process guidance through Microsoft 365 Copilot and Dynamics 365 Copilot experiences.

AI use cases should be assessed through the Success by Design lens of business value, data readiness, security, privacy, adoption impact, operational control, and measurable outcomes. Sensitive student information, wellbeing data, medical information, complaints, and regulated records must be governed carefully, with clear rules for access, auditability, explainability, and human review.

Data Governance for Analytics

Data governance is essential to ensure reporting remains trusted, secure, consistent, and compliant. The analytics governance model should align with the broader d365Education data strategy, security strategy, master data approach, and institutional information governance framework.

- **Data ownership:** assign accountable owners and stewards for student, applicant, programme, enrolment, finance, case, communication, and engagement data domains.
- **Common definitions:** establish a data dictionary for terms such as applicant, enrolled student, active student, retained student, withdrawn student, case, cohort, offer, conversion, completion, and intervention.
- **Security and privacy:** apply role-based access, row-level security where required, sensitivity labels, data classification, consent controls, and least-privilege access to analytics workspaces.
- **Data quality:** monitor duplicates, incomplete records, invalid relationships, missing consent, outdated statuses, integration exceptions, and unresolved data issues.
- **Lifecycle management:** define retention, archival, deletion, audit, and historical reporting requirements for operational and analytical datasets.
- **Change management:** manage changes to reports, datasets, KPIs, and semantic models through controlled release processes and documented approval pathways.
- **Responsible AI governance:** ensure AI-enabled analytics use approved data sources, respect privacy obligations, provide transparency, and support human decision-making rather than replacing accountable professional judgement.

Success by Design Review Considerations

During the Solution Blueprint Review, the intelligence strategy should be validated against the Success by Design architecture pillars. The review should confirm that reporting requirements are linked to business outcomes, data sources are understood, analytics security is aligned with privacy and compliance obligations, operational dashboards support actual management processes, Power BI architecture is scalable, and AI opportunities are introduced through governed and measurable use cases.

The resulting analytics capability should help educational institutions move from retrospective reporting to proactive, data-driven management of recruitment, enrolment, engagement, student support, retention, service quality, and institutional performance. It establishes the foundation for continuous improvement and future enhancement as d365Education matures across Dynamics 365, Power Platform, Microsoft Fabric, Power BI, and Copilot-enabled experiences.

10 Application Lifecycle Management Strategy

ALM Principles

- **Design for repeatability:** All d365Education changes must be deployable through a controlled, repeatable process rather than manual recreation.
- **Separate configuration from code:** Environment-specific settings, service endpoints, and credentials must be externalised using environment variables and connection references.
- **Promote through controlled environments:** Changes must flow from Development to Test, UAT, and Production with clear quality gates.
- **Use source control as the system of record:** Solution assets, deployment scripts, configuration mappings, and release documentation must be versioned.
- **Minimise unmanaged changes:** Direct changes in Production are restricted to emergency fixes governed by change control.
- **Align releases to education operations:** Release windows must consider academic calendars, enrolment periods, assessment cycles, timetabling, and student communications.

Solution Layering and Managed Solutions

d365Education will use managed solutions for Test, UAT, and Production environments. Development teams will work in unmanaged solutions only within dedicated development environments. The managed solution model protects production stability, supports clean upgrades, and enables rollback planning through versioned packages.

Layer	Purpose	Examples
Core Platform Layer	Reusable foundation components used across d365Education.	Security roles, common tables, shared fields, audit settings, base forms.
Education Domain Layer	Education-specific data model and business capabilities.	Students, guardians, courses, enrolments, attendance, wellbeing, academic progression.
Process Layer	Business process automation and guided user experiences.	Power Automate flows, business process flows, approval workflows, notifications.
Integration Layer	Integration components and connection abstractions.	APIs, virtual tables, Azure integration points, finance or learning management integrations.
Reporting and Analytics Layer	Operational and executive insights.	Power BI datasets, dashboards, embedded reports, data export configuration.

Development, Test, UAT, and Production Promotion

The d365Education promotion pathway will follow a structured sequence: Development, Test, UAT, and Production. Each environment has a defined purpose, access model, and promotion gate. Solution packages move forward only when the required validation evidence is complete, including build success, automated checks, functional testing, data migration validation, security verification, and stakeholder sign-off.

Source Control and Build Pipelines

Source control will be maintained in a central repository, such as Azure DevOps Repos or GitHub, with branch policies aligned to the release model. Exported solution components, deployment settings files, Power Platform build scripts, test artefacts, and release notes will be versioned together to provide traceability from requirement through to production deployment.

Release Management and Change Control

Release management will be governed through a formal change control process. Each release must have a named release owner, approved scope, documented impact assessment, deployment plan, validation plan, rollback approach, and communications plan. Change Advisory Board review is required for Production releases, high-risk configuration changes, integrations, data migration activities, and changes affecting student, guardian, staff, or compliance data.

Configuration Management

Configuration management will distinguish between solution components, reference data, environment-specific settings, and operational data. Configuration items such as education programme structures, academic calendars, consent categories, wellbeing classifications, roles, teams, and approval matrices must be documented, versioned where practical, and tested before promotion. Configuration changes must be reproducible and should not rely on undocumented manual steps.

Environment Variables and Connection References

Environment variables will be used for values that differ by environment, including API endpoints, Azure resource identifiers, email sender settings, integration flags, feature toggles, SharePoint locations, and external system references. Connection references will be used for Power Platform connectors to separate the app and flow design from the underlying connection credentials. This supports secure deployment, reduces manual rework, and ensures that integration connections can be governed consistently across environments.

Deployment Governance

Deployment governance ensures that d365Education remains supportable, secure, and aligned with institutional priorities. Governance controls include environment ownership, maker access policies, solution review checkpoints, automated validation, deployment approval gates, segregation of duties, audit logging, release communications, and post-deployment monitoring. Production deployments must be scheduled, communicated, and validated against agreed success criteria, with hypercare support available for priority education processes.

11 Environment and Capacity Strategy

Environment Topology

The recommended environment topology separates development, validation, testing, training, and production workloads to reduce deployment risk and support controlled lifecycle management. Each environment should have a defined purpose, access model, refresh cadence, data classification, and ownership model.

Environment	Purpose	Key Controls
Development	Configuration, customisation, solution packaging, unit testing, and early integration prototyping.	Restricted maker access, source control alignment, unmanaged solutions only, regular cleanup.
Build / Integration	Automated solution import, integration validation, and regression preparation.	Managed solution imports, deployment pipelines, automated validation checks.
System Test	End-to-end functional testing, integration testing, security role testing, and data migration rehearsal.	Production-like configuration, representative test data, formal defect management.
User Acceptance Testing	Business validation by admissions, student services, administration, marketing, compliance, and executive users.	Controlled refresh from production-like data, sign-off criteria, traceability to requirements.
Training	End-user training, business process walkthroughs, and super-user enablement.	Sanitised sample data, stable release version, reset schedule before each training cycle.
Production	Live operational use for students, applicants, staff, agents, alumni, and integrated systems.	Strict security, change control, monitoring, backup, disaster recovery, and service management.

Dataverse Capacity Planning

Dataverse capacity planning for d365Education must consider database storage, file storage, log storage, expected user volumes, integration throughput, reporting patterns, and long-term retention requirements. Capacity should be estimated during solution design and reviewed at each major release gate.

- Estimate core database growth from student profiles, applications, enrolments, activities, cases, notes, communications, placements, compliance records, and audit history.
- Estimate file growth from document attachments, student evidence, application documents, correspondence, consent records, and integration payloads.
- Estimate log growth from plug-ins, workflows, Power Automate runs, integration monitoring, auditing, and exception handling.
- Apply record retention and archiving policies by data domain, especially where student, applicant, finance, compliance, or regulatory data is involved.
- Review capacity monthly during implementation and quarterly after go-live, with earlier review if growth exceeds forecast thresholds.

Storage, Transaction, and API Usage Considerations

d365Education should be designed to minimise unnecessary storage consumption and manage transaction load across interactive users, background processes, integrations, portals, and analytics services. API usage should be reviewed against integration design, Power Automate patterns, bulk operations, and external system synchronisation schedules.

- Use Dataverse tables for structured operational data and avoid storing large binary documents directly where SharePoint or Azure storage is more appropriate.
- Configure document management integration for student and application documents where institutional policy allows.
- Batch integrations and schedule high-volume imports outside peak operating periods.
- Use change tracking, delta queries, and event-driven patterns where possible to reduce repeated full synchronisation loads.
- Monitor Power Automate triggers, custom APIs, plug-ins, and external integrations for excessive calls, retries, or inefficient query patterns.
- Define thresholds for API consumption, failed requests, queue backlog, and long-running operations as part of the technical operations model.

Performance and Scalability Requirements

The solution must support predictable performance for key education processes such as lead capture, application assessment, offer management, enrolment confirmation, student case management, communication tracking, reporting, and integrations with learning, finance, identity, and student administration systems.

Requirement Area	Blueprint Decision
User Experience	Forms, views, dashboards, and business process flows must be optimised for the roles that use them most frequently, with unnecessary fields, scripts, and sub-grids removed.
Peak Load	Peak admissions and enrolment periods must be modelled and tested, including campaign response spikes, application imports, student service case creation, and bulk communication activities.
Integration Performance	Integration designs must define expected frequency, payload size, retry behaviour, error handling, and whether the pattern is real-time, near real-time, or batch.
Reporting	Operational dashboards should use Dataverse views and model-driven app dashboards; high-volume analytics should use Power BI, replicated data, or data export patterns where appropriate.
Scalability	The architecture must allow additional institutions, campuses, brands, faculties, programs, and international student cohorts without redesigning the core data model.

Sandbox and Production Management

Sandbox and production environments must be managed through formal application lifecycle management controls. Changes should progress from development through test and user acceptance before deployment to production. Production access should be restricted, monitored, and aligned with least privilege principles.

- Use managed solutions for downstream environments and production deployments.
- Maintain a release calendar aligned to academic cycles, admissions periods, examination periods, and institutional blackout windows.
- Refresh sandbox environments from production only under an approved process that includes data masking or sanitisation where required.
- Separate configuration, reference data, test data, and production data ownership responsibilities.
- Maintain deployment runbooks, rollback plans, and post-deployment validation checklists for each production release.

Backup, Restore, and Disaster Recovery

The backup, restore, and disaster recovery model must support institutional continuity requirements for student engagement and administration processes. The solution team should document recovery objectives, restore responsibilities, business validation steps, and escalation paths before go-live.

- Define recovery time objective and recovery point objective targets for critical d365Education services.
- Document which operational processes can continue manually during a service interruption and how data will be reconciled after recovery.
- Maintain restore procedures for production and sandbox environments, including approval requirements and stakeholder communications.
- Test disaster recovery and restore procedures periodically, particularly before major admissions or enrolment cycles.
- Include dependent services such as Microsoft Entra ID, SharePoint, Power Automate, Power BI, integration middleware, and external student systems in continuity planning.

Monitoring and Operational Health

Monitoring must provide early visibility of system health, integration failures, capacity trends, user adoption issues, security events, and performance degradation.

Operational health should be reviewed through defined dashboards, alerts, service management processes, and regular governance forums.

Monitoring Area	Recommended Measures
Platform Health	Track Microsoft service health, environment availability, capacity utilisation, solution import outcomes, and administrative notifications.
Application Performance	Review form load performance, long-running workflows, plug-in execution, slow queries, dashboard usage, and recurring user-reported performance issues.
Integrations	Monitor failed messages, retry queues, authentication failures, throughput limits, duplicate processing, and reconciliation exceptions.
Operations	Track incident trends, service requests, release defects, change success rate, support backlog, and recurring data quality issues.
Security and Compliance	Review privileged access, role changes, audit logs, data export activity, conditional access events, and compliance exceptions.

Key Risks and Mitigations

Risk	Impact	Mitigation
Underestimated Dataverse growth	Capacity pressure, increased cost, degraded performance, and delayed releases.	Create capacity forecasts, monitor actual growth, archive inactive data, and use

Risk	Impact	Mitigation
		SharePoint or Azure storage for large documents.
Uncontrolled sandbox refreshes	Exposure of sensitive student data and disruption to testing cycles.	Use approved refresh processes, data masking, environment ownership, and refresh schedules.
High-volume integrations during peak periods	API contention, delayed processing, failed synchronisation, and user experience issues.	Schedule batch processing, use delta patterns, monitor throughput, and define retry and exception handling.
Lack of operational monitoring	Issues are identified only after business impact has occurred.	Implement health dashboards, alerts, regular service reviews, and clear incident escalation paths.

12 Test Strategy

The d365Education Test Strategy defines how the solution will be validated across functional, technical, integration, security, performance, accessibility, and user acceptance dimensions before production release. Consistent with Microsoft's Success by Design approach, testing is treated as a continuous lifecycle activity rather than a final project stage, with quality measured against agreed business processes, requirements, risks, and operational readiness criteria.

Testing Objectives and Scope

The objective of testing is to confirm that d365Education supports the agreed education business processes, including student lifecycle management, admissions, enrolment, curriculum administration, case and service management, communications, reporting, security roles, integrations, and data migration outcomes. Testing will verify that the solution is fit for purpose, reliable, secure, accessible, performant, and ready for adoption by administrators, educators, service teams, and students where applicable.

- Validate end-to-end business processes against approved requirements and solution design.
- Confirm that Microsoft Dynamics 365, Power Platform, Microsoft 365, reporting, integration, and data components operate together as designed.
- Identify and resolve defects as early as possible to reduce rework, adoption risk, and go-live risk.
- Provide measurable evidence that the solution satisfies entry and exit criteria for each testing phase.
- Support formal business sign-off prior to go-live readiness review and production deployment.

Test Phases and Entry/Exit Criteria

Phase	Purpose	Entry Criteria	Exit Criteria
Unit Testing	Validate individual configurations, plugins, workflows, Power Automate flows, security roles, and custom components.	Build item complete; developer or configurator test cases prepared; required test data available.	Configured item passes expected outcomes; critical defects resolved or accepted with mitigation.
System Testing	Validate completed functional areas within d365Education.	Configured features deployed to controlled test	Priority business scenarios pass; open defects

Phase	Purpose	Entry Criteria	Exit Criteria
		environment; test scripts approved.	triaged and assigned.
Integration Testing	Validate interfaces across Dynamics 365, Dataverse, Microsoft 365, Power Platform, external student systems, finance, identity, or learning platforms.	Integration endpoints, credentials, mappings, and monitoring approach available.	Data exchange, error handling, reconciliation, and retry processes confirmed.
Regression Testing	Confirm that new changes do not negatively affect previously accepted functionality.	Regression suite identified; release candidate deployed.	No unresolved high-severity regression defects remain.
User Acceptance Testing	Confirm business readiness and user acceptance of the solution.	UAT environment stable; users trained; scenarios and acceptance criteria agreed.	Business sign-off received or conditional sign-off documented with approved actions.
Performance, Security, and Accessibility Testing	Validate non-functional readiness for production use.	Non-functional requirements, user volumes, roles, and scenarios agreed.	Performance, security, privacy, and accessibility risks resolved or formally accepted.

Unit, System, Integration, and Regression Testing

Unit testing will be performed by the configuration and development team as each work item is completed. System testing will validate functional solution areas such as admissions, student records, courses, enrolments, communications, activities, service cases, dashboards, and workflow automation. Integration testing will confirm that source and target systems exchange accurate and complete information, including validation of field mappings, business rules, error handling, and exception reporting. Regression testing will be repeated for each release cycle and will focus on high-value education processes, previously resolved defects, and areas affected by configuration or code change.

User Acceptance Testing

User Acceptance Testing will be conducted by nominated business representatives using realistic education scenarios and agreed acceptance criteria. UAT will focus on whether d365Education supports the way the institution needs to operate, not simply whether individual features work. Test scenarios should cover daily operational activities, exception handling, approval processes, student communications, reporting outputs, and role-based access. UAT outcomes will be formally recorded, with sign-off required from the appropriate business owner before go-live readiness activities are completed.

Performance Testing

Performance testing will validate that d365Education can support expected production usage patterns, including peak enrolment periods, bulk communications, reporting workloads, integration processing, and concurrent user activity. Performance scenarios will be based on agreed non-functional requirements, expected user volumes, transaction volumes, data volumes, and service-level expectations. Results will be reviewed to identify configuration changes, process optimisation, capacity considerations, or design changes required before deployment.

Security and Accessibility Testing

Security testing will validate that users can access only the information and functions appropriate to their role, organisational unit, and responsibilities. Testing will include role-based access, field-level security, record ownership, team access, audit settings, authentication, and integration permissions. Accessibility testing will confirm that key user journeys are usable by people with accessibility needs and align with institutional accessibility obligations, including keyboard navigation, screen reader compatibility, colour contrast, labels, and error messages.

Test Data Strategy

The test data strategy will provide realistic, controlled, and compliant data for each test phase. Data sets will include representative student, applicant, course, enrolment, academic period, staff, case, communication, and consent records. Where production data is used, it must be appropriately masked, anonymised, or approved in accordance with privacy and information security requirements. Test data will support positive, negative, boundary, security, integration, migration, and regression scenarios, and will be refreshed or reset between cycles as required.

Defect Management and Reporting

All defects will be recorded in the agreed project tracking tool with sufficient detail to reproduce, triage, assign, resolve, retest, and close the issue. Each defect will include

severity, priority, affected process, environment, test case reference, owner, target resolution date, status, and supporting evidence. Defect reporting will provide transparent visibility of testing progress, pass and fail rates, defect trends, ageing defects, blocked scenarios, and readiness risks. Go-live decisions will consider unresolved defects, business impact, available workarounds, and formal acceptance by the relevant project governance body.

13 Training, Adoption, and Change Management

The objective of the Training, Adoption, and Change Management workstream is to ensure that d365Education is understood, accepted, and embedded into daily operations across the institution. The approach treats adoption as a business transformation activity rather than a final-stage training task. It begins during discovery and design, continues through build and testing, and remains active after go-live to reinforce new behaviours, improve user confidence, and maximise the value of the Dynamics 365 investment.

Change Impact Assessment

A structured Change Impact Assessment will be completed for each major functional area affected by d365Education, including student recruitment, admissions, enrolment, student services, academic administration, finance touchpoints, marketing and communications, compliance reporting, and executive analytics. The assessment will compare current-state processes, roles, systems, data flows, controls, and decision points against the future-state operating model enabled by Dynamics 365.

The assessment will identify the scale and nature of change for each stakeholder group, including process change, system change, data ownership change, reporting change, role or responsibility change, policy change, and behavioural change. Each impact will be classified by severity, readiness level, adoption risk, and mitigation requirement. Findings will be used to inform the communication plan, training strategy, super user model, transition support plan, and go-live readiness criteria.

Stakeholder Communication Plan

The Stakeholder Communication Plan will provide clear, timely, and role-relevant messaging throughout the d365Education program. Communications will explain why the change is being made, what business outcomes are expected, how the new solution will affect each audience, what decisions or actions are required, and where users can access support. Communication will be aligned to the Success by Design project phases of Initiate, Implement, Prepare, and Operate, ensuring that key messages support readiness and adoption at each stage.

Audience	Primary Message Focus	Channel	Timing
Executive sponsors and steering committee	Business outcomes, risks, decisions, readiness, and benefits realisation	Steering committee updates, executive briefings, dashboards	Monthly and at key quality gates

Audience	Primary Message Focus	Channel	Timing
Faculty and academic leaders	Impacts on student engagement, academic workflows, visibility, and service quality	Leadership forums, targeted briefings, recorded updates	At process design, UAT, and go-live preparation
Student administration and services teams	New processes, role expectations, data quality responsibilities, and support model	Team meetings, or Teams posts, newsletters, training invitations	Fortnightly during implementation and weekly near go-live
IT, data, and support teams	Operational readiness, security, integration, support processes, and release governance	Technical workshops, readiness checklists, service transition meetings	Throughout build, test, deployment, and operate phases
End users and super users	What is changing, how to prepare, training expectations, go-live support, and feedback channels	Training portal, Teams channels, knowledge base, quick reference guides	From UAT preparation through hypercare

Training Strategy by Role

The training strategy for d365Education will be role-based, scenario-led, and aligned to real education business processes rather than generic system navigation. Training will be designed around the tasks each role must perform in the future-state solution, the data they own or maintain, the decisions they support, and the outcomes they are accountable for. Training will be delivered progressively so users build understanding before formal acceptance testing and gain confidence before go-live.

Role Group	Training Focus	Delivery Method	Outcome
Executives and senior leaders	Dashboards, KPIs, student lifecycle visibility, benefits tracking, and governance reporting	Executive briefings and dashboard walkthroughs	Confidence in decision support and performance visibility

Role Group	Training Focus	Delivery Method	Outcome
Admissions and recruitment teams	Prospect management, application tracking, communications, campaign attribution, and pipeline management	Hands-on role-based workshops and guided simulations	Ability to manage the full recruitment-to-admission process
Student services and administration	Case management, student interactions, service requests, enrolment support, and escalation processes	Process walkthroughs, scenario labs, and quick reference guides	Consistent service delivery and accurate student record management
Faculty and academic staff	Student engagement visibility, referrals, communications, and academic support workflows	Short targeted sessions and self-service learning modules	Improved engagement with student support and follow-up processes
IT administrators and support teams	Security roles, environment management, integrations, support procedures, data quality, and release management	Technical workshops, administrator guides, and service transition sessions	Operational readiness and sustainable support capability
Super users and champions	Advanced process knowledge, troubleshooting, peer coaching, UAT support, and feedback capture	Train-the-champion workshops and community sessions	Localised adoption support and reduced dependency on the project team

Training Materials and Knowledge Base

A central knowledge base will be established to support learning before, during, and after go-live. It will contain role-based learning paths, process maps, quick reference guides, frequently asked questions, recorded training sessions, release notes, known issues, troubleshooting guidance, and links to relevant Microsoft Dynamics 365 and Power Platform guidance. The knowledge base will be accessible through Microsoft Teams or SharePoint and will be governed so that content remains current as the solution evolves.

Training materials will be created using future-state d365Education processes and representative education scenarios. Materials will cover both “how to use the system”

and “how to perform the business process” so users understand the purpose of each step, the expected data quality standard, the downstream impact of their actions, and how the solution supports institutional outcomes such as improved student engagement, faster admissions processing, better service responsiveness, and enhanced reporting.

Super User and Champion Network

A Super User and Champion Network will be established to provide localised support, strengthen adoption, and create a feedback loop between business users and the project team. Champions will be selected from each major school, faculty, campus, business unit, or service function based on process knowledge, credibility with peers, willingness to support change, and ability to communicate feedback constructively.

The network will participate in early solution demonstrations, process validation, UAT preparation, training material review, user readiness activities, and go-live support. After go-live, champions will assist with first-level peer support, identify adoption barriers, recommend improvements, and reinforce standard operating procedures. The network will meet regularly during implementation and hypercare, then transition into an ongoing community of practice for continuous improvement.

Adoption Measurement

Adoption measurement will be used to confirm whether d365Education is being used effectively and whether the expected business outcomes are being realised. Measures will be defined during solution design and refined during UAT and go-live readiness planning. Adoption reporting will combine system usage analytics, process performance indicators, training completion data, support trends, data quality measures, and stakeholder feedback.

Measurement Area	Example Measures	Purpose
User readiness	Training attendance, completion rates, assessment results, confidence surveys	Confirm users are prepared before go-live
System usage	Active users, login frequency, process transaction volumes, dashboard usage	Confirm the solution is being used as intended
Process adoption	Lead conversion, application processing time, case resolution time, task completion, SLA adherence	Measure whether future-state workflows are embedded

Measurement Area	Example Measures	Purpose
Data quality	Duplicate records, incomplete fields, invalid statuses, integration exceptions	Improve trust in reporting and downstream processes
Support and sentiment	Ticket volume, recurring issues, user feedback, champion insights, satisfaction surveys	Identify adoption barriers and continuous improvement opportunities

Success by Design Alignment

This workstream supports the Success by Design principle that successful Dynamics 365 projects require disciplined planning, quality reviews, risk mitigation, and readiness validation across the full implementation lifecycle. For d365Education, change impact, communication, training, knowledge management, champion enablement, and adoption measurement will be treated as core solution blueprint components and will be reviewed during design, UAT, go-live readiness, and post-go-live optimisation.

14 Deployment and Cutover Strategy

The deployment and cutover strategy establishes the approach for moving d365Education from validated non-production environments into live operational use. The strategy is designed to protect academic operations, minimise disruption to students, staff, and administrators, and provide clear governance over release readiness, migration execution, go-live decision making, and contingency response.

Deployment Approach

d365Education will be deployed using a controlled, phased deployment approach that supports progressive validation, business adoption, and operational readiness. The recommended model is a pilot-to-production release, beginning with a representative group of users and education business processes before full institutional rollout.

- **Environment progression:** Configuration, extensions, integrations, reports, and security roles will progress through development, test, user acceptance testing, pre-production, and production environments.
- **Solution packaging:** Managed solutions and controlled release packages will be used to ensure consistent deployment across environments.
- **Release governance:** Each release will be reviewed against scope, quality, security, performance, data migration, and operational readiness criteria before promotion.
- **Education calendar alignment:** Deployment windows will avoid peak academic periods such as enrolment deadlines, census dates, examinations, grading cycles, fee due dates, and reporting obligations.
- **Integration readiness:** Integrations with Microsoft 365, Entra ID, Teams, SharePoint, Power Platform, learning systems, finance systems, student information systems, and reporting platforms will be validated before production release.

Release Readiness Criteria

Release readiness will be assessed through formal go/no-go checkpoints. The release will proceed only when the project steering group, business owners, solution architect, technical leads, and service readiness stakeholders confirm that the solution is ready for operational use.

Readiness Area	Criteria
Functional readiness	All in-scope education processes, including admissions, enrolments, student engagement, case management, communications, events, and reporting workflows, have passed user acceptance testing.

Readiness Area	Criteria
Technical readiness	Production environments, integrations, authentication, security roles, monitoring, backups, and support access have been configured and validated.
Data readiness	Migration reconciliations, data quality checks, record counts, exception logs, and business sign-offs confirm that migrated data is complete and fit for use.
Performance readiness	Key scenarios have been tested for expected transaction volumes, concurrent users, reporting load, and integration throughput.
Security and compliance readiness	Role-based access, privacy controls, audit requirements, student data protection obligations, and administrative segregation of duties have been reviewed and approved.
Business readiness	Training, communications, support guidance, process documentation, and change impact assessments have been completed.
Support readiness	Hypercare team members, escalation paths, issue triage processes, service desk procedures, and knowledge articles are in place.

Cutover Plan

The cutover plan defines the controlled sequence of activities required to transition from legacy systems and manual processes to d365Education in production. A detailed cutover runbook will be maintained, rehearsed, and approved before go-live.

1. **Cutover preparation:** Confirm the cutover window, freeze periods, communications, stakeholder availability, production access, deployment package, migration scripts, and integration dependencies.
2. **Legacy system readiness:** Apply agreed transaction freezes, complete final extracts, preserve audit records, and communicate read-only access arrangements where required.
3. **Production deployment:** Deploy managed solutions, environment variables, security configuration, workflows, Power Automate flows, model-driven app settings, reports, dashboards, and integration endpoints.
4. **Final data migration:** Execute final data migration loads, validate record counts, reconcile exceptions, and obtain business approval for key migrated datasets.
5. **Smoke testing:** Validate authentication, navigation, security roles, core transactions, integrations, reporting, email generation, Teams and SharePoint connectivity, and priority student administration scenarios.

6. **Go-live approval:** Conduct a formal go/no-go meeting, review readiness evidence, confirm open risks and mitigations, and record the decision to proceed.
7. **Production activation:** Enable production users, activate scheduled jobs and integrations, publish communications, and transition support monitoring to the hypercare model.

Data Migration Execution

Data migration execution will be managed as a governed workstream with clear ownership, repeatable migration tooling, reconciliation controls, and business validation. Migration activities will be rehearsed during test cycles so that final cutover migration can be completed within the approved deployment window.

- **Scope of migrated data:** Student records, applicants, guardians and contacts, courses, programs, enrolments, cases, activities, communications history, tasks, consent records, reference data, and open operational items.
- **Migration waves:** Data will be migrated through trial loads, dress rehearsals, and final production load, with each wave improving data quality and execution predictability.
- **Data cleansing:** Duplicate records, invalid values, inactive records, missing mandatory fields, inconsistent identifiers, and obsolete reference data will be addressed before final migration.
- **Validation controls:** Migration will be validated using source-to-target record counts, sampling, exception reporting, reconciliation reports, and business owner sign-off.
- **Operational ownership:** Data stewards will be appointed for each major education data domain to confirm data quality, resolve exceptions, and approve migrated datasets.

Business Readiness Activities

Business readiness activities will prepare academic, administrative, student services, admissions, marketing, and leadership stakeholders to adopt d365Education confidently. Readiness will be measured through training completion, role-based process understanding, user acceptance participation, communications engagement, and support preparedness.

- **Stakeholder communications:** Publish go-live messages, key dates, scope changes, support contacts, known limitations, and expected user actions.
- **Role-based training:** Deliver targeted training for admissions teams, student advisors, course administrators, marketing users, case workers, finance users, managers, and system administrators.

- **Process documentation:** Provide quick reference guides, standard operating procedures, frequently asked questions, and exception handling guidance.
- **Change impact management:** Identify changes to user roles, approval paths, reporting processes, communications, record ownership, and handoffs between departments.
- **Adoption tracking:** Monitor training attendance, readiness survey responses, user confidence, and open adoption risks before go-live.

Go-Live Support Model

The go-live support model will provide focused hypercare support immediately after production activation. The objective is to rapidly resolve issues, support users through priority processes, stabilise integrations and reporting, and transition the solution into steady-state support.

- **Hypercare period:** A dedicated support period will operate for an agreed duration after go-live, typically aligned to the first critical business cycle.
- **Support channels:** Users will access support through agreed channels such as service desk, Teams support channel, floor walkers, super users, and escalation contacts.
- **Issue triage:** Issues will be categorised by severity, business impact, affected user group, workaround availability, and required resolution timeframe.
- **Daily governance:** Daily hypercare stand-ups will review incidents, defect trends, user adoption feedback, integration monitoring, and priority decisions.
- **Operational transition:** At the end of hypercare, open issues, knowledge articles, administrative procedures, and support metrics will be handed over to the steady-state support team.

Rollback and Contingency Planning

Rollback and contingency planning will ensure that the organisation has clear decision points and response options if go-live readiness is not met or if a material production issue occurs during cutover. The preferred approach is to prevent rollback through rehearsal, validation, and risk-based governance; however, business continuity plans will be maintained for critical scenarios.

- **Rollback triggers:** Critical data migration failure, unresolved authentication issue, major integration outage, unacceptable performance degradation, failed security validation, or inability to complete core education processes.
- **Decision authority:** The go/no-go authority will rest with the project sponsor or steering group, supported by the solution architect, technical lead, business process owners, and support lead.

- **Rollback actions:** Suspend production activation, retain legacy operational access, restore pre-cutover configuration where required, communicate the revised timeline, and re-plan remediation activities.
- **Contingency operations:** Manual workarounds, read-only access to legacy systems, temporary spreadsheets, controlled case intake procedures, and deferred batch processing may be used for time-critical education activities.
- **Recovery validation:** Any rollback or contingency action will include confirmation of data integrity, audit trail preservation, user communications, and revised readiness criteria before a new go-live attempt.

15 Operate and Continuous Improvement

The Operate and Continuous Improvement workstream defines how d365Education will be stabilised, governed, supported, enhanced, and kept current after go-live. In alignment with Microsoft's Success by Design methodology, this phase focuses on maintaining the long-term health of the solution, protecting business continuity, and ensuring the platform continues to deliver measurable value to students, educators, administrators, and institutional leadership.

Post-Go-Live Stabilisation

Post-go-live stabilisation provides a controlled transition from project delivery into steady-state operations. For d365Education, the stabilisation period should run for an agreed hypercare window and focus on validating business process readiness, resolving priority defects, monitoring system adoption, and confirming that critical education operations are functioning as designed.

- Establish a hypercare command structure with daily triage, issue ownership, and escalation paths.
- Monitor priority processes such as admissions, enrolments, student lifecycle management, attendance, communications, case management, and reporting.
- Validate integrations with Microsoft 365, Power Platform, identity, finance, learning systems, and third-party education applications.
- Track user adoption, training gaps, data quality issues, and recurring support themes.
- Exit hypercare only when agreed operational readiness criteria and service acceptance measures are met.

Support Model and SLAs

The support model defines how incidents, service requests, configuration changes, and operational questions are managed after go-live. A tiered model should be adopted to separate first-line institutional support from specialist application, integration, infrastructure, and Microsoft escalation responsibilities.

Support Tier	Primary Responsibility	Example Activities
Tier 1: Business Support	Institutional super users and service desk	User guidance, known issue resolution, access requests, basic data checks, and training reinforcement.
Tier 2: Application Support	d365Education functional and technical support team	Configuration support, defect analysis, workflow troubleshooting,

Support Tier	Primary Responsibility	Example Activities
		reporting issues, and integration triage.
Tier 3: Platform and Vendor Support	Microsoft, ISV, integration, and infrastructure specialists	Platform incidents, product defects, environment issues, release regressions, and advanced technical escalation.

Service levels should define response and resolution targets by severity, including business impact, affected user groups, workaround availability, and compliance implications. SLA performance should be reviewed regularly to identify recurring themes and improvement opportunities.

Operational Governance

Operational governance ensures that d365Education remains secure, compliant, performant, and aligned to institutional priorities. Governance should continue beyond project closure and include decision forums, ownership models, risk management practices, service reporting, and architectural oversight.

- Establish an Operational Governance Board responsible for service health, prioritisation, risk review, and roadmap alignment.
- Maintain clear ownership for business processes, data stewardship, security roles, environments, integrations, and reporting.
- Review service metrics including incident volume, SLA achievement, user adoption, system performance, data quality, and release readiness.
- Ensure changes are assessed against architecture principles, Microsoft roadmap alignment, compliance obligations, and operational risk.
- Maintain documentation for support procedures, configuration decisions, integration dependencies, and business continuity processes.

Enhancement Backlog Management

The enhancement backlog provides the mechanism for capturing, prioritising, approving, and delivering continuous improvements after go-live. Enhancements may include new business capabilities, automation opportunities, reporting improvements, user experience changes, regulatory updates, and process refinements identified through operational usage.

- Capture enhancement requests through a controlled intake process with defined business owner sponsorship.
- Classify requests by value, urgency, risk, effort, dependency, compliance impact, and alignment to the d365Education roadmap.

- Use a prioritisation forum to approve items for discovery, design, build, test, and release.
- Maintain traceability from business need to solution design, acceptance criteria, testing evidence, deployment decision, and post-release benefit review.
- Separate defects, service requests, minor configuration changes, and strategic enhancements to support clear decision-making.

Platform Updates and Release Wave Management

Microsoft Dynamics 365 and the Power Platform are continuously updated through planned release waves and ongoing service updates. d365Education requires a structured release management process to assess change impact, validate compatibility, plan adoption of new capabilities, and reduce operational risk.

- Review Microsoft release wave plans and product roadmap updates for relevant Dynamics 365, Power Platform, and Microsoft 365 changes.
- Assess functional, integration, security, reporting, performance, and user experience impacts before production deployment.
- Use sandbox environments for regression testing, business validation, and release rehearsal.
- Coordinate release communication, training updates, deployment windows, and cutover planning with business stakeholders.
- Maintain a release calendar that incorporates Microsoft updates, institutional blackout periods, academic calendars, enrolment peaks, and examination periods.

Continuous Improvement Roadmap

The continuous improvement roadmap translates operational insight into a forward-looking plan for business value realisation. It should combine user feedback, service performance, institutional strategy, technology roadmap opportunities, and measurable outcomes into a rolling plan of improvement initiatives.

- Define 30, 60, and 90-day post-go-live improvement priorities based on stabilisation findings.
- Develop a 6 to 12-month roadmap for process optimisation, automation, reporting maturity, student engagement, and staff productivity.
- Align roadmap items to institutional goals such as improved student experience, reduced administrative effort, better compliance, and enhanced decision support.
- Measure benefits using agreed KPIs, including adoption rates, case resolution time, enrolment processing time, intervention effectiveness, data quality, and user satisfaction.

- Review and refresh the roadmap through operational governance forums to ensure it remains aligned with Microsoft product direction and institutional priorities.

Success Measures

Success will be measured by the ability of d365Education to operate reliably, support priority education processes, respond effectively to incidents, adopt Microsoft platform innovations, and deliver ongoing business improvements. The operating model should ensure that the solution remains secure, supportable, scalable, and aligned to the evolving needs of the institution.

16 Risks, Issues, Decisions, Open Questions, and Success by Design Review Findings

Risk Register

ID	Risk	Impact	Likelihood	Mitigation / Response	Owner
R-01	Education-specific requirements are not fully validated across schools, colleges, or higher education operating models.	High	Medium	Run structured requirements playback sessions by persona and institution type; maintain traceability to business outcomes and Success by Design review topics.	Business Process Lead
R-02	Data migration complexity is underestimated, especially for student, enrolment, attendance, fees, alumni, and legacy CRM records.	High	High	Define a migration strategy early, profile source data, agree cleansing responsibilities, and conduct multiple trial migrations before user acceptance testing.	Data Migration Lead
R-03	Integration scope grows beyond the approved architecture, including LMS, finance, identity, parent portals, payment gateways, and reporting platforms.	High	Medium	Establish an integration catalogue, classify integrations by criticality, confirm ownership, and apply design governance before build commences.	Solution Architect
R-04	Security and privacy model does not adequately address student data protection, role-based access, consent, safeguarding, and	High	Medium	Design security roles, business units, field-level security, audit settings, retention policies, and compliance controls	Security Lead

ID	Risk	Impact	Likelihood	Mitigation / Response	Owner
	regional compliance requirements.			as part of the security strategy review.	
R-05	User adoption is delayed due to insufficient change management, training, or stakeholder engagement across academic, administration, admissions, and student services teams.	Medium	High	Prepare role-based training, adoption communications, champion networks, and readiness measures before go-live.	Change Manager

Issue Register

ID	Issue	Status	Impact	Required Action	Owner
I-01	Final scope for admissions, enrolment, academic engagement, student services, events, alumni, and fundraising modules requires confirmation.	Open	High	Confirm in scope / out of scope capabilities and map each capability to release phases.	Project Sponsor
I-02	Data ownership for key education entities has not yet been agreed.	Open	High	Assign data stewards for students, guardians, courses, enrolments, attendance, assessments, communications, and alumni records.	Data Governance Lead
I-03	Reporting and analytics requirements need prioritisation between operational	Open	Medium	Run analytics prioritisation workshop and confirm Power BI dataset strategy.	Reporting Lead

ID	Issue	Status	Impact	Required Action	Owner
	dashboards, executive reporting, compliance reporting, and predictive insights.				
I-04	Non-functional requirements for performance, availability, backup, monitoring, and support are not fully baselined.	Open	Medium	Document operational requirements and align them with environment, capacity, and support planning.	Technical Lead

Key Design Decisions

ID	Decision Area	Decision	Rationale	Implications
D-01	Platform Strategy	d365Education will be built on Microsoft Dynamics 365 and Microsoft Power Platform, using Dataverse as the core operational data platform.	This supports a Microsoft-first architecture with extensibility, security, workflow automation, reporting, and integration options.	Requires disciplined ALM, environment governance, licensing review, and Dataverse capacity planning.
D-02	Education Data Model	The solution will use a standardised education data model for students, guardians, courses, enrolments, communications, cases, events, alumni, and stakeholder relationships.	A common data model reduces duplication, supports analytics, and enables repeatable implementation across education organisations.	Requires fit-gap analysis for each institution and strict governance over custom fields and extensions.
D-03	Security Model	Access will be role-based, supported by business units, teams, field-level security, auditing, and least-privilege access principles.	Education data includes sensitive student and guardian information and must be protected by design.	Requires security workshops, test scripts, privacy impact review, and access validation before go-live.

ID	Decision Area	Decision	Rationale	Implications
D-04	Integration Approach	Integration will be API-led where possible, using Power Platform connectors, Azure integration services, and approved middleware patterns.	This supports maintainability, monitoring, scalability, and future integration expansion.	Requires integration ownership, error handling, message monitoring, and agreed service-level expectations.
D-05	Release Strategy	The first release will focus on priority capabilities required for measurable operational value, with later phases covering advanced automation and analytics.	A phased delivery approach reduces implementation risk and supports adoption.	Requires a clear product backlog, release governance, and change control process.

Open Questions and Follow-Up Actions

ID	Open Question	Follow-Up Action	Owner	Target Date
Q-01	Which education segments are included in the initial release: K-12, higher education, vocational training, professional education, or multi-campus education groups?	Confirm priority segments and validate persona journeys for each.	Product Owner	TBD
Q-02	What legacy systems will remain as systems of record after go-live?	Create application inventory and determine system-of-record ownership for each business entity.	Solution Architect	TBD
Q-03	What regional privacy, data residency, consent, safeguarding, and retention rules must be supported?	Conduct compliance workshop and document mandatory controls.	Compliance Lead	TBD

ID	Open Question	Follow-Up Action	Owner	Target Date
Q-04	Which reports are required for go-live versus post-go-live optimisation?	Prioritise reporting backlog and define minimum viable dashboard set.	Reporting Lead	TBD
Q-05	What support model will apply after go-live?	Define support tiers, escalation paths, service levels, and hypercare plan.	Support Lead	TBD

Success by Design Review Findings

Review Area	Finding	Assessment	Recommended Action
Program Strategy	The overall business vision for d365Education is strong, but project scope, rollout sequencing, and benefit measures should be formally baselined.	Risk identified	Define measurable outcomes, phase boundaries, governance forums, and decision rights.
Business Process Strategy	Core education journeys should be validated end-to-end, including admissions, enrolment, student engagement, case management, events, alumni, and communications.	Action required	Run process playback workshops and document fit-gap outcomes.
Application Strategy	The Dynamics 365 and Power Platform approach is appropriate, provided customisation is governed and reuse of standard capabilities is prioritised.	Positive finding	Maintain a design authority and review customisations against standard platform capability.
Data Strategy	Data migration is a major success dependency and requires early profiling, cleansing, ownership, and validation planning.	High risk	Prepare migration strategy, data mapping workbook, trial migration plan, and reconciliation controls.

Review Area	Finding	Assessment	Recommended Action
Integration Strategy	Integration architecture must be controlled to avoid unmanaged point-to-point dependencies.	Risk identified	Create integration catalogue, confirm technical patterns, define monitoring, and document ownership.
Security Strategy	The solution must adopt privacy-by-design principles due to sensitive education and student information.	Action required	Complete security model design, privacy impact assessment, and role-based access testing.
ALM Strategy	Environment and release management should be formalised before build activities scale.	Action required	Define development, test, UAT, training, and production environments; implement solution packaging and release controls.
Environment and Capacity Strategy	Capacity, performance, storage, and operational monitoring assumptions require validation.	Open item	Confirm expected users, transaction volumes, storage growth, reporting workloads, and non-functional requirements.

17 Appendices

Appendix A: Glossary

Term	Definition
Success by Design	Microsoft's prescriptive implementation framework for architecting, building, testing, deploying, and operating Dynamics 365 solutions.
Solution Blueprint	A consolidated design artefact describing the business objectives, process scope, application architecture, data, integrations, security, reporting, risks, and implementation approach.
d365Education	A Microsoft Dynamics 365 and Power Platform based education solution supporting student administration, enrolment, class and timetable management, communications, student records, reporting, and stakeholder engagement.
Fit-Gap	The assessment of how well standard solution capabilities meet business requirements, identifying configuration, extension, integration, or process-change gaps.
Dataverse	Microsoft's secure, scalable data platform used by Dynamics 365 and Power Platform for transactional and relational business data.

Appendix B: Reference Architecture Diagrams

The reference architecture for d365Education should be maintained as a set of diagrams covering the end-to-end education solution landscape. The diagrams should align business outcomes to Dynamics 365, Dataverse, Power Platform, Microsoft 365, Azure integration services, security services, and external education platforms.

Diagram	Purpose	Key Components
Logical Solution Architecture	Shows how d365Education capabilities are grouped across applications and services.	Dynamics 365, Dataverse, Power Apps, Power Automate, Power BI, Microsoft Teams, SharePoint, Outlook.
Integration Architecture	Illustrates data flows between d365Education and external systems.	Student information systems, learning management systems, finance systems, identity platforms, APIs, Azure integration services.
Security Architecture	Documents identity, access, role-based security, data	Microsoft Entra ID, Dataverse security roles, business units,

Diagram	Purpose	Key Components
	protection, and compliance controls.	teams, field security, auditing, conditional access.
Reporting and Analytics Architecture	Defines reporting layers and analytical data consumption patterns.	Power BI, Dataverse views, dashboards, Microsoft Fabric or data lake services, operational reports.

Appendix C: Process Catalog

Process Area	Process	Business Outcome
Recruitment and Admissions	Enquiry, application, interview, offer, acceptance, and enrolment conversion.	Improved student recruitment visibility and conversion management.
Student Administration	Student profile, enrolment status, attendance, wellbeing, medical information, and communications.	Single student view with secure access to operational records.
Academic Operations	Course, subject, class, timetable, assessment, grading, and progression management.	Streamlined academic administration and improved planning accuracy.
Stakeholder Engagement	Parent, guardian, student, alumni, teacher, and community engagement.	Consistent communications and relationship management across the student lifecycle.
Events and Activities	School tours, open days, excursions, extracurricular activities, and conferences.	Controlled registration, attendance, communication, and follow-up.

Appendix D: Fit-Gap Register

ID	Requirement	Fit / Gap	Resolution Approach	Priority
FG-001	Manage student enquiries and applications.	Fit	Configure Dynamics 365 entities, forms, stages, and automated communications.	High
FG-002	Synchronise enrolment data with an external student information system.	Gap	Build API-based integration using agreed master data ownership and error handling.	High

ID	Requirement	Fit / Gap	Resolution Approach	Priority
FG-003	Provide executive dashboards for enrolment pipeline, attendance, and student engagement.	Fit	Deploy Power BI dashboards using Dataverse and governed analytical data sources.	Medium

Appendix E: Data Entity Catalogue

Entity	Description	System of Record	Data Classification
Student	Core student demographic, enrolment, and lifecycle information.	d365Education / SIS, as agreed	Confidential
Parent / Guardian	Contact, relationship, consent, and communication preferences.	d365Education	Confidential
Course / Subject	Academic offering, curriculum structure, year level, and delivery details.	d365Education / Academic system	Internal
Attendance	Daily or session-based attendance records and absence reasons.	d365Education / Attendance system	Confidential

Appendix F: Integration Catalogue

Integration	Source	Target	Pattern	Frequency
Student Master Data	Student Information System	Dataverse	API or scheduled synchronisation	Near real-time or daily
Learning Activity	Learning Management System	d365Education / Analytics	API, file import, or data lake integration	Daily
Finance and Billing	Finance System	d365Education	Batch or API integration	Daily or event-based
Identity and Access	Microsoft Entra ID	Dynamics 365 / Power Platform	Identity federation and role assignment	Real-time

Appendix G: Security Role Matrix

Role	Typical Users	Access Scope	Key Permissions
System Administrator	Platform administrators	Organisation-wide	Full configuration, security, environment, and integration administration.
Admissions Officer	Admissions team	Applications and prospective students	Create and manage enquiries, applications, offers, and admissions communications.
Student Services Officer	Student administration team	Assigned students or business unit	Maintain student records, attendance, wellbeing cases, and communications.
Teacher / Faculty	Teaching staff	Assigned classes and students	View class lists, attendance, student information, and relevant communications.
Executive	Leadership team	Read-only cross-institution	Access dashboards, KPIs, and aggregated operational insights.

Appendix H: Reporting Catalogue

Report / Dashboard	Audience	Purpose	Data Source
Admissions Pipeline Dashboard	Admissions and executive teams	Monitor enquiry, application, offer, and enrolment conversion.	Dataverse / Power BI
Student Attendance Report	Student services and teaching staff	Identify attendance trends, exceptions, and follow-up needs.	Dataverse
Student Engagement Dashboard	Leadership, student services, and faculty	Track interactions, wellbeing indicators, and intervention activity.	Dataverse / Power BI
Operational Performance Dashboard	Executive team	Provide a consolidated view of enrolment, attendance, communications, and service levels.	Power BI / Fabric-ready data estate

Appendix I: Traceability Matrix

Requirement ID	Business Requirement	Process	Design Artefact	Test Case	Status
REQ-001	Capture and qualify admissions enquiries.	Recruitment and Admissions	Admissions process design, data model, security role matrix.	TC-ADM-001	Draft
REQ-002	Maintain a secure single student profile.	Student Administration	Student entity design, security role matrix, reporting catalogue.	TC-STU-001	Draft
REQ-003	Integrate enrolment data with external systems.	Student Administration	Integration catalogue, data entity catalogue, architecture diagrams.	TC-INT-001	Draft