



## Solution Overview

The National Industry Coalition of Examples

Dynamics 365 Implementation

Version .11

Author: SL

### Version History

Version	Date	Author	Notes
.1	5/23/19	SL	Initial Document
.2	5/29/19	SL	Added integration estimate and language to support exclusions.

.3	6/25/19	JB	Added field "Core" for Designation
.4	7/1/19	SL	Added filing field relationship to State
.5	7/1/19	JB	1.Strikethrough the relationships on Course assignments as duplicates for Course entity 2. Adding workflow to course assignment 3. Adding Course Date to Course and Course Assignment
.6	7/3/19	SL	Added relationship from Course to Instructor Approval
.7	7/8/19	SL	Modified Award date and Start Date on Designation award entity
.8	7/8/19	JB	Add Type to Event to classify the type of event.
.9	7/9/19	SL	Added order relationship to Discount Coupon
.10	7/11/19	JB	Added a N:N relationship from Course Assignments to Designation Awards. Added Start Date to Designation Award
.11	7/26/19	SL	Added Filing Format entity definition, added fields to Filing Fields

## Table of Contents

Overview .....	5
Company Overview.....	5
Designations.....	5
Continuing Education (State Agencies).....	6
Events.....	6
Self-Paced Learning.....	7
Systems .....	7
Project Overview.....	8
Objectives.....	8
Event Marketing .....	8
Resource Management.....	9
Course Management.....	9
Production Management .....	9
Project Details.....	9
D365 Customer Engagement Customizations .....	10
Entities .....	10
Account .....	10
Contact.....	10
License.....	12
State.....	12
State CE.....	13
State Filing .....	17
Filing Format .....	20
Filing Field.....	22
Course.....	22
Course Assignment.....	23
Instructor Approval .....	24
Product.....	25
Designation .....	26
Designation Award .....	26
Task Template.....	28
Task Template Item.....	29
Task Template Execution.....	29
Event .....	30
Session.....	31

Speaker Engagement.....	32
Event Registration .....	32
Book Template File .....	33
Book File .....	34
Discount Coupon.....	35
Model Driven Apps .....	36
Portal.....	36
Storefront.....	36
Detail Page.....	37
Event Registration .....	37
Account Management .....	37
Content Portal .....	37
Profile Management .....	37
Integrations.....	38
Business Central .....	38
LMS System .....	38
Data Migration.....	38
Security .....	39
D365.....	39
Portal.....	39
Training.....	39
Administrative Training.....	40
End User and Power User Training .....	40
Custom REST Site .....	40
Business Central.....	41
Core Functionality.....	41
Third Party Apps.....	42
Customizations.....	42
Reports.....	42
Data Migration.....	43
Training .....	43
Project Management .....	43
Notes and Exclusions .....	44
Services Estimate .....	45
Appendix A – Data Model .....	46

Appendix B – Systems Diagram .....	47
Glossary of Terms.....	48

## Overview

### Company Overview

The National Industry Coalition of Examples (NICE) is a nonprofit insurance industry training and continuing education institution based in Austin, TX. Through a combination of self-paced learning, hosted events, licensed events and online webinars, the company provides state certification, training, and achievement designations for insurance agents and their employees. While the company also has an educational publishing division, the scope of the project centers around educational instruction, certifications, and continuing education credit with state agencies.

### Designations

NICE has five core designations they offer; Certified Industry Example Representative (CIER), Certified Industry Example Counselor (CIEC), Certified Example Manager (CEM), Certified Example Risk Manager (CERM), and Certified Example Training Manager (CETM). Each designation has a set of requirements a participant must meet in order to achieve certification. Typically, this involves attending instructor led training classes either at a live event or through hosted webinars. The company also offers self-paced learning through their integrated learning management system. Once a participant has met the requirements of the designation and passed any applicable tests, they are awarded the certification.

Much like the Microsoft achievement model, the NICE model has multiple levels of achievement that participants can advance to as they are awarded certification in various designations. These levels include; Fundamentals, Associate, Expert and Advanced. Each level corresponds to a specific set of achievements within a particular coverage area. For instance, a participant achieves Associate by completing a single designation certification. Once the same participant is certified in another qualifying designation, they are considered an Expert in the areas achieved.

Designations have a fixed period of time that they are applicable both with respect to the completion of required coursework to achieve the certification as well as the ongoing maintenance of the certification. For instance, a CIEC certification requires the participant to complete the required coursework within a 5-year time frame in order to be eligible. There are instances however where NICE may extend the time frame for achieving the certification within a reasonable period of time. This is usually considered on a case by case basis and manually overridden in their current system.