



# University of HUDDERSFIELD

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Wickham, Sarah

Ensuring a degree of success : managing the student record from within the records management system

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Educating tomorrow's professionals

**JISC Building Bridges conference:  
Ensuring a degree of success  
3<sup>rd</sup> March 2009**

M Sarah Wickham  
University Records Manager



## Managing the student record from within the records management system

- SITS, EDRMS and records management at Huddersfield – the background
- Integrating SITS and the EDRMS
- Lessons learned

## Huddersfield, SITS, EDRMS and records management

- 7 schools, 3 campuses, 12-13 support services
- 22,000+ students, 2,200(ish) staff
- SITS in use since 1997-8
- Document management project begun early 2004; Wisdom in use since 2006
- Records manager/information governance officer appointed late 2007

# What is the student record?

Academic School:  
School Office

Student Services:  
Careers

Academic School:  
Skills Tutor

Student Services:  
Counselling

Admis  
Record

Academic School:  
Module leader

Registry:  
disciplinary

Occupational Health

Student Services:  
Disability Support

Student Finance  
Office: income

Academic School:  
Admission

Student Finance  
Office: ALF

Registry: appeals

International Office

# The Student Centre



## So where does the EDRMS come in?

- Easily viewable in conjunction with SITS for current business purposes
- Easily accessible to those who need and who have authority to use
- Better maintenance and management of authoritative records
- Retention & disposal in line with the schedule



# Implementation: student records

The screenshot shows the Wisdom student records system interface. At the top, there is a red header bar with the 'Wisdom' logo on the left and a 'W' on the right. Below the header is a navigation bar with links: Home, Folder, Search, and Wisdom Settings. The main interface is divided into two panels. The left panel, titled 'Folder', shows a tree structure of folders. The right panel contains tabs for 'General', 'Folders', 'Subject/Keywords', 'Notes', and 'Mand'. Below these tabs are sections for 'Custom Items', 'Security', 'Audit', and 'Actions'. The 'General' tab is active, showing a 'Reference' field, a 'Title' field, and a 'Next Number' field with the value '3'. There is also a 'Review' section.

Wisdom

Home Folder Search Wisdom Settings

Folder

- [1] Student Admin
  - [1] Application and Enrolment
  - [2] Module Choices
  - [3] Research Degrees
  - [4] Attendance
  - [5] Placement and Field Trips
  - [6] Personal Circumstances
- [2] Student Finance
- [3] Student Services
- [2] Occupational Health

General Folders Subject/Keywords Notes Mand

Custom Items Security

Audit Actions

General

Reference

Title

Next Number 3

Review



# The fileplan:

- [ADMIN] Student-Template
  - [01] Student-Admin
    - [01] Application-and-Enrolment
    - [02] Module-Choices
    - [03] Research-Degrees
    - [04] Attendance
    - [05] Placement-and-Field-Trips
    - [06] Personal-Circumstances
  - [02] Student-Finance
    - [01] Student-Expenses
    - [02] Access-to-Learning-Fund
    - [03] Payments
    - [04] Bridging-Loans
    - [05] LEA-Contribution-Forms
    - [06] School-Finance-Issues
  - [03] Student-Services
    - [01] Student-Support
    - [02] Disability-Office-General-Correspondence
    - [03] Student-BOE-Disciplinaries-Appeals-Complaints
    - [04] Exit-References
  - [04] Occupational-Health
    - [01] COSHH-40
    - [02] Health-10

## View from the School of Education & Professional Development



Jane Reddington,  
Deputy School  
Services Manager

Admin staff are now either saving directly into Wisdom or scanning in - the process is quick once the student has been retrieved in SITS and saves time. We no longer need to sift through a filing cabinet for the piece of paper; an added bonus is that the need for storage space is reduced. Academics are also gradually being trained to access the student area through e-vision so there will only be one file per student - unlike the present situation of many files and no-one knowing exactly what is where!

## Lessons learned

- Colleagues get it and (mostly) like it!
- Approach to integrating with line of business system
- Active relationship with users and key stakeholders
- Project management: clarity of purpose and brief, timescale/momentum

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[www.hud.ac.uk/cls/recordsmanagement](http://www.hud.ac.uk/cls/recordsmanagement)

✉ [s.wickham@hud.ac.uk](mailto:s.wickham@hud.ac.uk)



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