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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
3rd March 2009**

M Sarah Wickham
University Records Manager



University of
HUDDERSFIELD



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

Admission
Records

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 displays the Wisdom student records system interface. At the top left is the 'Wisdom' logo. A navigation bar contains 'Home', 'Folder', 'Search', and 'Wisdom Settings'. Below this is a 'Folder' dropdown menu. The left sidebar shows a tree view of folders: '[1] Student Admin' (expanded) containing '[1] Application and Enrolment', '[2] Module Choices', '[3] Research Degrees', '[4] Attendance', '[5] Placement and Field Trips', and '[6] Personal Circumstances'; '[2] Student Finance'; '[3] Student Services'; and '[2] Occupational Health'. The main content area has tabs for 'General', 'Folders', 'Subject/Keywords', 'Notes', 'Mand', 'Custom Items', and 'Security'. An 'Audit Actions' dropdown is visible. Below this is a folder icon and a redacted area. The 'General' tab is active, showing a 'Reference' field with a redacted value, a 'Title' field with a redacted value, and a 'Next Number' field with the value '3'. A '+ Review' link is at the bottom.

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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