RMS North group: Scanning & Archiving
9th July 2009

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University Records Manager

Scanning to manage records

- EDRMS and records management at Huddersfield – the background

- The current scanning project
  - Admissions and Records Office
  - Roll out the scanner (we'll have a barrel of fun)

- Lessons learned

Huddersfield, EDRMS and records management

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

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What is the student record?

Academic School:
Skills Tutor

Academic School:
School Office

Student Services:
Careers

Student Services:
Counselling

Admis...
Record...

Academic S...
Module lea...

Registry:
disciplinaries

Occupational Health

Student Service...
Disability Suppo...

Student Finance
Office: income

Academic S...
Admission...

Student Finan...
Office: ALF

Registry: appeals

International Office
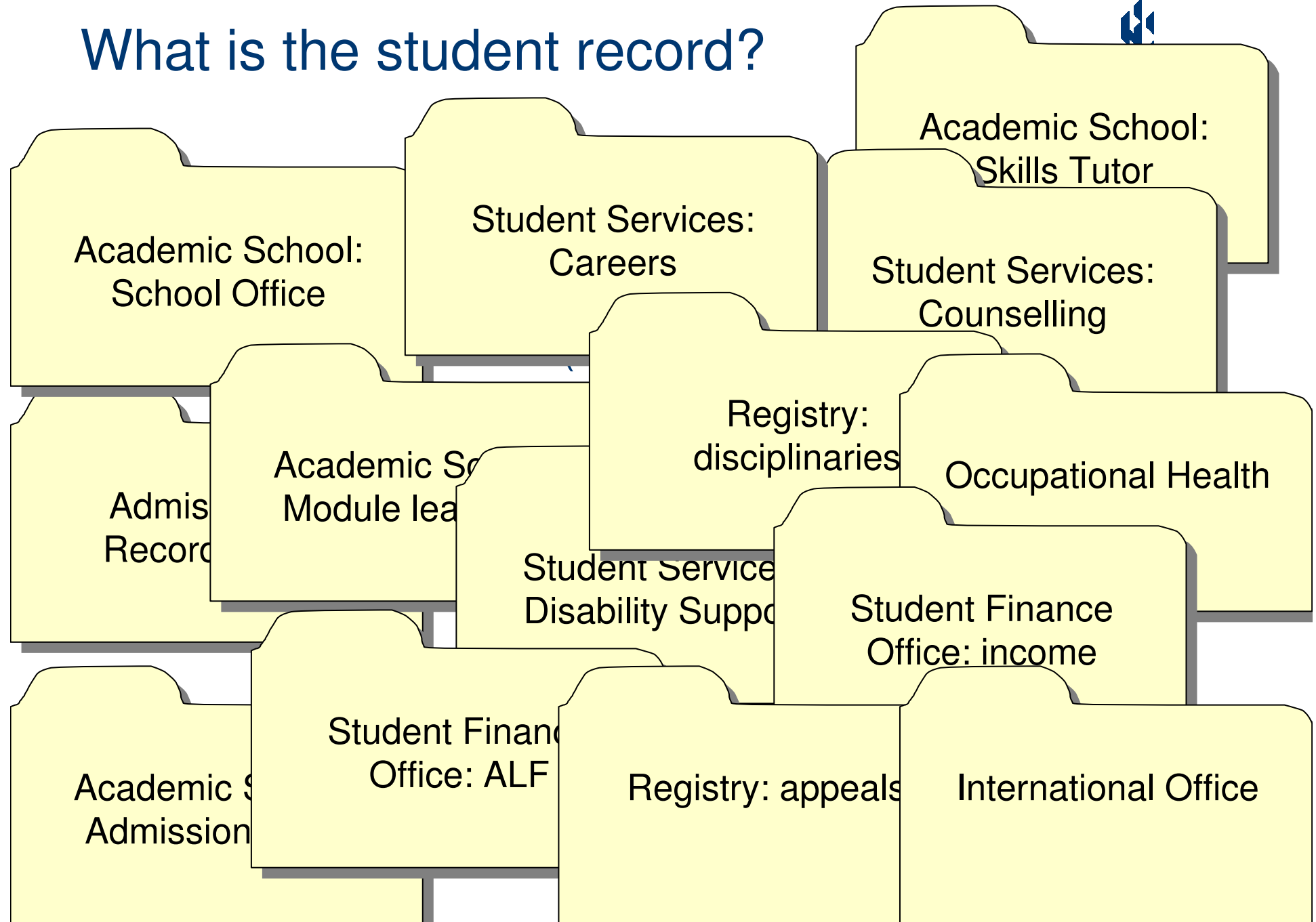
The student fileplan:

- [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

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The scanning process

What's next?

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- June/July 2009: infrastructure (server and local scan stations)
- July 2009: generic document import routines for student documents
- July/August 2009: the summer catch-up/stripping week
- Thereafter: new document types & import routines

Lessons learned

- Project management: clarity of purpose and brief, timescale/momentum
- Explicit decision about being pragmatic/fit for purpose
- Risk-based approach depending on content
- Wider information needs in future
- Check image breaks in licences!
- Don't forget to allow for handling, scanner daily rates and metadata creation
- Take digital preservation needs into account

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