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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
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
  - Admission Record
  - Module leader

- **Student Services:**
  - Careers
  - Counselling
  - Disability Support

- **Registry:**
  - Disciplinaries
  - Appeals

- **Student Finance Office:**
  - Income

- **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 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-Conversion-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
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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