



# University of HUDDERSFIELD

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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  
3<sup>rd</sup> 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 shows the Wisdom student records system interface. At the top left is the 'Wisdom' logo. Below it is a navigation bar with 'Home', 'Folder', 'Search', and 'Wisdom Settings'. The main area is divided into a left-hand navigation pane and a right-hand content area. The left pane 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 right pane has tabs for 'General', 'Folders', 'Subject/Keywords', 'Notes', 'Mand', 'Custom Items', and 'Security'. Below the tabs is an 'Audit Actions' dropdown menu. A folder icon is shown next to a redacted folder name. Below that, the 'General' tab is active, showing a form with fields: 'Reference' (redacted), 'Title' (redacted), and 'Next Number' 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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[www.hud.ac.uk/cls/recordsmanagement](http://www.hud.ac.uk/cls/recordsmanagement)

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