



University of  
St Andrews | FOUNDED  
1413 |

TRIBAL

working as one

# Using SID in Finance

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# Using SID in Finance

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**Alison Barnett**  
**Cash Office Supervisor**

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# What is SER?

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## **SER - Senate Efficiency Review**

*To deliver a programme of continuous improvement of student administration and seek efficiencies and enhancements to the student and staff experience following the defined programme principles within a culture of collegiate partnership and engagement*

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# What is SID?

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## SID – Student Information Desk

*SID will allow Schools/Units to manage student enquiries in an efficient and effective manner. Responses will be uniformed, communication between Units will be more transparent and there will be full auditability and management information available.*

*A fully functioning, clearly branded and easily accessible enquiry management system which will manage 100% of all enquiries from students, staff, third parties and others in respect of the participating departments.*

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# Which Units are involved in SID?

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## Wave 1

- Student Services
- Registry
- Student Accommodation Services
- Finance

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# Which Schools/Units are involved in SID?

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## Wave 2

### Units

CAPOD

ELT

Careers

Development

### Schools

Comp. Science

Divinity

History

Management

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# Benefits of SID for Finance

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**SID will revolutionise the way Finance staff respond to enquiries!**

- Timely and professional responses
- FAQ's - reduced number of enquiries
- Manage staff workloads
- Holistic view students record
- Audit trail of enquiries
- Reduce the number of generic email accounts
- Finance dashboard
- Improved email communication
- Reduce copying of emails into SITS
- Only Finance enquiries to Finance
- Reduce cross Unit enquiries
- User friendly

HIDE MENU EXPAND ALL COLLAPSE ALL

Student Enquiry Centre TEST

Alison Barnett (AFB2)  
Finance - Operations

Sign out

Enquiry Centre

- Accommodation Enquiry Centre
- Finance Enquiry Centre
- Registry Enquiry Centre
- Student Services Enquiry Centre

Search For...

Enquiries

Profiles

My Options

- Quick Enquiry Log
- One Click Enquiry Log
- Log Enquiry For Enquirer
- Search Enquiries
- My Summary
- My Team Summary
- My Enquiry Centre Summary
- All Enquiry Centre Summary

Enquiry Summary: Finance Enquiry Centre : Page reloading in 02:5 seconds  Pause Group by Team Go

Enquiries filtered on: All Current enquiries, Enquiry Centre (of teams): Finance Enquiry Centre

Enquiry summary										
Team	Open	Expert	Waiting 1st Response	Re-Opened	On Amber	On Red	Out of Contract	With Enquirer	With Advisor	Closed
Finance - Accounts Payable Team	1		1				1		1	
Finance - Credit Control Team	18		16				16	1	17	
Finance - Cash Office Team	10			1				7	3	
Finance - Financial Accounts Team	1		1				1		1	
Finance - Operations Team	4	2	2	1			2		4	
Finance - US Loan Team	16		14				14	1	15	
<b>Totals</b>	<b>50</b>	<b>2</b>	<b>34</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>34</b>	<b>9</b>	<b>41</b>	<b>0</b>

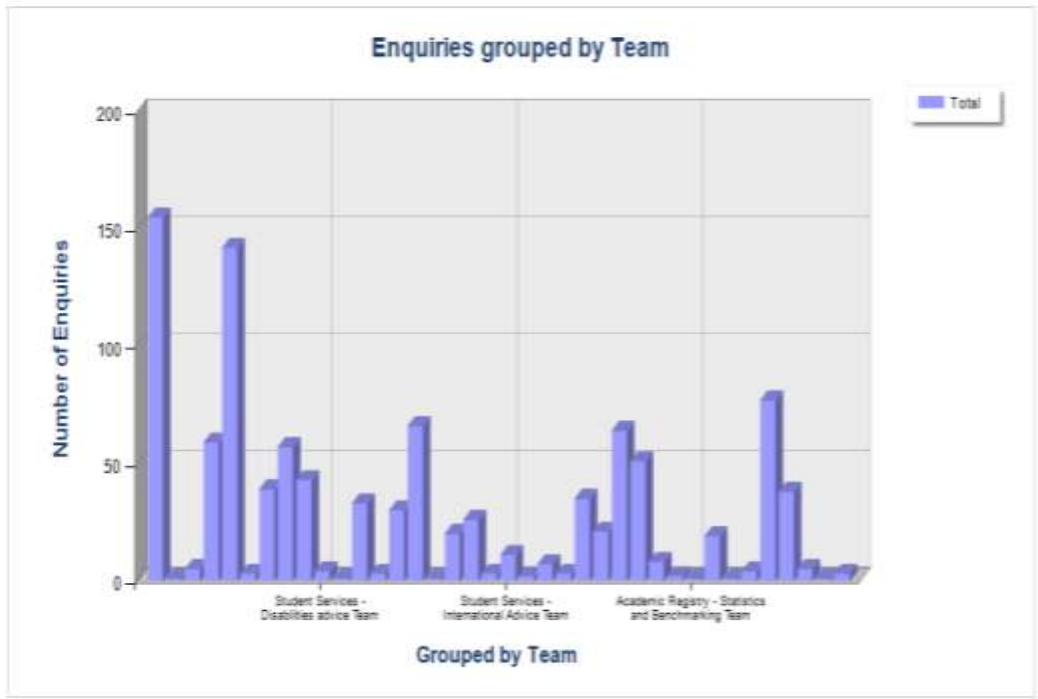
Select Multiple Enquiries 20 records per page

Page 1 - showing records 1 to 20 of 34 records (2 pages at 20 records per page)  
 Grouped by team, then sorted by column 'updated' (desc)

Number and Title	Status	Logged	By	From	Category	Severity	Team	Advisor	Updated	Reply By
<b>Team: Finance - Accounts Payable Team</b>										
000517 : Scholarship Delay	3	23/03/2015 14:11:26	XU ZHU	PT10Y	21	2	FINAP	KRT2	*14/05/2015 10:01:03	
<input type="checkbox"/> Further details <input type="checkbox"/> Initial enquiry										
<b>Team: Finance - Credit Control Team</b>										



<a href="#">adnrews.ac.uk Subject: Automated Email: Enquiry 000432 has a reply-by date of 20/03/2015</a> <span style="float: right;">00:04:23</span>									
<span style="color: red;">Awaiting first response from advisor</span> <input type="checkbox"/> Further details <input type="checkbox"/> Initial enquiry									
000696 : Location of Study	3	20/04/2015	THOMAS BOURNE	PD35Y	10	2	ASC	ASC	
<span style="color: red;">Awaiting first response from advisor</span> <input type="checkbox"/> Further details <input type="checkbox"/> Initial enquiry									
000621 : test enquiry full log 31/3/15	3	31/03/2015	John Generic	GEN	11	2	ASC	ASC	*31/03/2015 14:25:03
<span style="color: red;">Awaiting first response from advisor</span> <input type="checkbox"/> Further details <input type="checkbox"/> Initial enquiry									
000521 : Still can't find the answer I want. Exasperating!!	3	23/03/2015	HYDROGEN FARRELL		11A	2	ASC	ASC	*27/03/2015 11:12:08
<span style="color: red;">Awaiting first response from advisor</span> <input type="checkbox"/> Further details <input type="checkbox"/> Initial enquiry									



Sign out

Enquiry Centre

Accommodation Enquiry Centre

Finance Enquiry Centre

Registry Enquiry Centre

Student Services Enquiry Centre

FAQ Look-Up

Type search term here

FAQ Options

Search FAQs

Show All FAQs

FAQ Stats and Charts

Create New FAQ

Menu

FAQ Statistical Summary Options

Show/Hide Chart Options

Category	FAQ Count	FAQ record hits counter (the resettable display value)	Total count of FAQ view log records	FAQ view log records within date range	FAQ view log records - solution provided	FAQ view log records within date range - solution provided	Number of Votes	Rating: Total	Rating: Average
Tuition Fees - payment enquiries	18	280	285	285	4	4	7	25	3
Accommodation Fees - payment enquiries	14	219	226	226	1	1	9	33	4
SAAS funding	6	87	87	87	1	1			
SLC funding	7	100	101	101	2	2	2	6	3
US Loans funding	11	136	136	136	1	1	3	5	2
Sponsors (not incl. SAAS & SLC)	8	101	101	101	4	4	3	15	5
Forms and Letters	2	16	16	16	1	1	2	2	1
<b>Totals:</b>	<b>66</b>	<b>939</b>	<b>952</b>	<b>952</b>	<b>14</b>	<b>14</b>	<b>26</b>	<b>86</b>	<b>18</b>

disability

application fees

i need an extension

pre payment exam

supervisor deadline

refund exchange

leaving money

accommodation

statement phd

extension

payment general

withdrawal

tuition thesis

absence

fee status

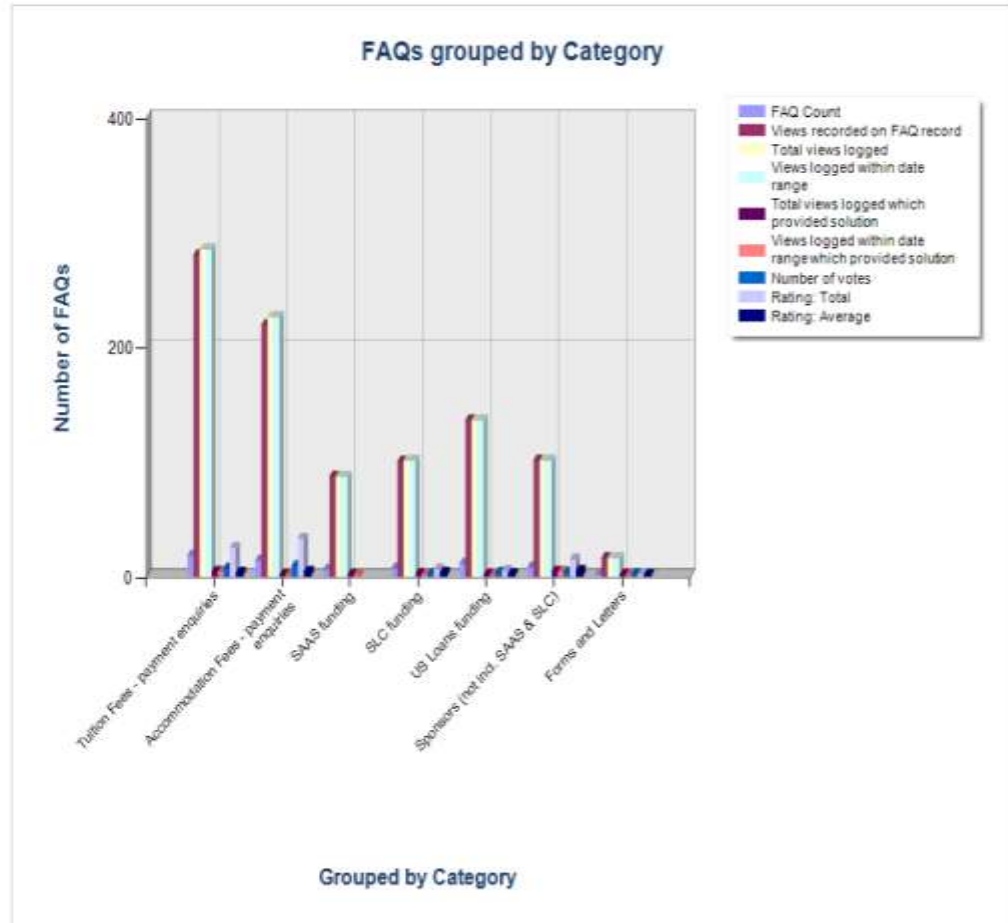
- FAQ Stats and Charts
- Create New FAQ

Menu



Sponsors (not incl. SAAS & SLC)	8	101	101	101	4	4	3	15	5
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fee status



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# Finance Involvement in the SID Project

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- We worked closely with Fees and Funding team
- We thought about how enquiries should be categorised
- Revised and created FAQ's
- Agreed ownership of FAQ's
- Agreed ownership of enquiries
- Created 'Teams' within SID
- Decided which email accounts would be harvested
- Drew up a training plan, and had an ongoing action list
- Reviewed our quick parts
- Testing of current workflows
- Attended drop-in sessions
- Maintained a positive attitude throughout 😊
- Set up weekly meetings with project team and met all SID deadlines
- Updated team members at staff meetings
- **Created staff 'questions and answers' for training**
- **Effective communication**
- **Proactive and positive**
- Motivated staff to accept change
- Agreeing SLA
- Liaising with Units and project team
- Part of SID user group
- Completed a business case and SID identified as a Finance project

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# Benefits of SID for Students

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## SID will revolutionise the way students ask questions

- Enhance the student experience
- **Professional system**
- Information and answers should be easier found
- **Will receive faster and consistent responses**
- Regular updates on call progress
- Look and feel will be the same
- Students will have a full audit trail of their enquiries
- Cross Units knowledge about students
- Students can filter their enquiry
- **Availability of FAQ's**
- Feedback is easy to submit
- 24/7
- Seamless process
- Know how to submit an enquiry

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# Benefits of SID for the University

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- **Enhance the student experience**
- Improved cross unit communication
- **Management information**
- **Triage system** at the ASC and for matriculation
- Share knowledge & develop best practice – other Uni's
- Case Management system
- Ability to roll in Wave 2 by employing in-house expertise

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# What Finance still need to do for SID?

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- More testing
- Training
- Review and identify new FAQ's
- Communicating to staff current position – Team meetings
- Liaising with other Uni's for hints and tips
- Thinking out side the box

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## When is SID coming?

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Wave 1 – go live date 1<sup>st</sup> July 2015

36 days to go!!



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# SID in the Future

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**All Staff need to be on board/not bored!**

- Students = Enquirers
- Sections = Teams
- Units = Centres
- E-mails = Enquiries

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# Summary of SID

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- ITS - Emergency Shut Down
- Careers - Elderly Services Division
- Admissions - Estimated Start Date
- Accommodation - En-suite, Single or Double
- Student Services – Eat, Sleep and Drink
- Finance - Eric's Student Debtors
- Finance – Eric's Sarcastic Disasters
- Registry – Exams, Submissions and Distance learners

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**SID**

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Any Questions?