

StudentRelate

Because you care



- Complete Student Services relationship solution
- Professional service management enhances student lifetime experience
- Easy-to-use, intuitive user interface. Users like it; users use it
- Ends paper pain fast



Student

Breath of Fresh Air

StudentRelate is a complete service management solution for all areas of Student Services. Administration work becomes quick and easy. It has a high level of flexibility designed for self-managing, dedicated staff. The resulting freedom to just 'get on and do your job' is empowering. It works like no other; it's innovative, intuitive design is a 'breath of fresh air'.

Complete Service Management

StudentRelate helps staff to create the university life experience every student expects. It provides a single source of relationship history, case notes, documents, e-mails, telephone conversations. Students need not be kept waiting for a file to be found or for the prime contact person to become free. It's designed for teams; sometimes sharing student data, sometimes having confidential records. Service/case items can be assigned to appropriate staff with workflow options like automated e-mail alerts.

StudentRelate is much more than a student relationship system. It includes facilities to manage relationships with university staff involved in dealing with each student's needs. Relationships with external organisations are also supported (eg suppliers, funding bodies, visa contacts, potential employers etc.)

Customised

Administrative processes are customised separately for each type of service. Wherever outdated systems, are sapping the effectiveness of service staff, StudentRelate is customised to carry out established processes. In the case of paper files, it eliminates paper-pain forever.

One Time Data Entry

Basic student data available in registry and other university systems does not need to be entered manually. There is a daily feed of current data; so with StudentRelate you are always working on the latest information. In addition student data can be transferred directly to other university systems so avoiding the need to enter data twice.

Your Interface; Your Way

Personal colour coding control of each screen view helps alert staff to students with priority needs (eg 'at-risk') or specific types of contact or organisation. Status settings and colour choices are under user control and colour rules can be switched on or off under user control. Colour rules can be triggered by spreadsheet-like calculations based on student data (eg- remaining budget low=red). Size and position windows where you want. Have saved workspaces.

Freedom to Work Efficiently

StudentRelate helps staff work quickly with minimum effort and is optimised for minimum mouse clicks and minimum views. With screen formatting optionally customised for each and every user, it works the way you work.

Easy-to-Use

It's intuitive. New users learn quickly how the system works because it follows the normal ways of working common in personal computer software for the last 20 years. A new team member sits with a mentor and knows the basics by lunch time. It's easy to use, so people use it

Relationship e-Mail Management

Integration with Outlook allows for immediate storing of incoming e-mails from students. The diary and contact details synchronise too. Together with notes of conversations and documents this provides a full picture for subsequent communications. E-mailing to large numbers of students is also supported. Some users are sending out 10's of thousands of focused information campaigns for students every year.

Reports, Graphs and Statistics

There are over 50 standard reports and dashboard graphics. Additional bespoke report templates can be provided. Dashboard report displays can be created using DIY wizard tools. These may be departmental but can also be for one person only, managing to a set of personal statistics. There is no limit to the number of dashboards.

Work-anywhere Design

StudentRelate works where you need it.

- PC workstation for office-based staff
- WiFi link using a browser
- Broadband (home working)
- Phone, iPad and BlackBerry

There is also a special 'small screen' interface for most mobiles with browser and web connectivity.



StudentRelate



Self-Sufficient

Your StudentRelate project creates your service management solution with your business processes based on user-amendable customisations. This makes your team self-sufficient. You become liberated from the obligation to call upon and pay for IT programming resource every time you need to make screen layout or process changes. Users are completely in control of all the data tools and report set-ups they need. StudentRelate is the liberating solution of the student relationship administration world.



Selective Data Sharing

Where faculty/school or academic staff need access to current service records this can be made available on browser. Confidentiality rules are respected in this type of access. It is widely used for giving latest study provisions for students receiving disability support

Workflow

For handling important service delivery events there are options to create e-mail alerts if a completion date is exceeded. Escalation e-mails alert supervisory staff of a need to take a special interest or take remedial action.

Action plans allow you to create your own automated processes. A predetermined sequence of tasks and meetings is saved as a template. They are available for immediate use as an agreed solution process for problems as they occur. These include automated alarms and pop-ups.

Low IT Support Resource

Maximizer is mature and reliable, leading to minimal requirement for IT resource support. System is designed for minimum intervention. Cloud working with self-hosted, IIS means workstations do not need local software installed. Client-server working on networks is also supported for PC workstations.

Rapid Implementation Projects

In a StudentRelate project we work in partnership with a small core team. We jointly build all processes with screen displays and necessary data items. Projects usually require 6-8 weeks. Following this rapid transformation, the Application Administrator and some other members of the core team will be self-sufficient in modifying processes as departmental demands evolve and change.

Compliant with Industry Standards

The database software is Microsoft SQL Server. This gives it open integration options with other university systems and is fully compatible with Microsoft IT infrastructure. Data access with SQL Server Reporting Services enables easy report creation.

In Continuous Use for Over 15 Years

Since its first implementation StudentRelate is now in daily use in 15 universities.... Used across Student Services, StudentRelate has been used successfully for:

- Accommodation
- Careers
- Counselling
- Finance
- Disability
- Study skills
- International
- Complaints
- Student life host
- Behaviour
- Exchanges
- Casework
- NMH support
- Placement
- Student life newsletter
- Disciplinary

Benefits

Moving to StudentRelate from pure paper and filing cabinet systems can be expected to free-up as much as 50% otherwise wasted time. Moving from inefficient, spreadsheets, 'clunky' multi-screen CRM systems and out-of-date Access systems will bring an ease of use and efficiency gain. Possibly a 25% improvement might be expected.

Maximizer Inside

At the heart of every StudentRelate implementation is world-leading Maximizer software. With over 1 million sold and 20 years of innovative software development, it is a sound IT investment for any organisation.

Find Out More

When you are ready to find out more about how StudentRelate could help you, call

Jl Software +44(0)1234-214004

StudentRelate

Overview of Functions

Managing Contact Relationships

- Individual record cards for students
- Unlimited notes for meeting records, phone conversations
- Unlimited documents including e-mails and printed documents, Word, PDF's etc
- Cards have upload option for photo
- Complete relationship history
- Individual record cards for organisations. Organisation chart view. One click link to web site.
- Separate custom data fields for contacts and organisations

Intuitive User Interface

- Screen interface consistent with 'look and feel' conventions used in Word/Excel/Windows etc.

Time Management

- Diary for each member of the team
- Booking of appointments from Outlook
- To-Do list; optional share with colleagues
- Tasks can be re-assigned/delegated
- Action plans (groups of tasks) can be assigned to team members. User-defined plan templates for workflow

Mail Merge

- Unlimited template letters
- Any group of individuals may be sent a standard communication, correctly merged with user/sender's personal data
- e-Mail merge also an option with plain text and HTML templates supported
- Mass e-mail communications supported using SMTP with bounce-back report when opened and automatic removal on request

Managing Service Commitments

- Separate records for each service commitment item. Attached notes track progress on resolving issue.
- Several staff may work on an item
- Automatic e-mail alerts if jobs go over completion date.

- SLA reports useful in the event of complaints or disputes.
- Service tasks are re-assignable

Knowledge Base

- Record answers to FAQs in keyword searchable records
- Store knowledge which requires specific forms of wording. Save process instructions for important actions

Document Library

- Unlimited store of standard documents, forms etc.
- Save departmental e-mail attachments ready for use

Social Networking

- Integration with Linked-in. Shows individual's profile in separate window

Classroom Support Scheduling

- Support workers selected by skill type and availability. Manage e-mail confirmations from database

Microsoft Office Compatibility

- Store Word/Excel/PDF/E-mail documents
- Mail merge to Word
- Single mouse click to export to Excel on main list views

Outlook Integration

- E-mails copied into database from Outlook toolbar icon
- Synchronisation of diaries between Outlook and Maximizer
- Download contacts phone numbers and details to compatible smartphones

Web Access

- Browser-based user interface compatible with Firefox and Internet Explorer
- Deployment through IIS

Searching and Grouping

- Create groups for individual communication or communication campaigns or for statistical analysis
- Search on individual fields or groups, use 'and'/'or' selections

- Link appropriate screen view format to each saved search and favourite list for immediate display.

Working with Lists

- Use searching and grouping tools to create lists then validate that group contents are correct by checking column report view.
- Use previously saved search templates
- Save specific lists for later reference.
- Create larger groups by combining lists
- Use lists to create processes for contacting students or working with external organisations
- Easy customisation of list format by users means that IT experts not needed when view/report requirements change

Maps: Google & Bing

- Integration to link contact address to map location

Data Security

- Confidential records option based on staff role
- Control of amend/delete rights

Control of Data Visibility

- Visibility control of user-defined data fields for contacts and organisations
- Option to have academic/faculty staff use the database without having access to secure pieces of information or records.

Data Analysis and Graphs

- Basic graphing tools work on any list of students in view
- Select a column of data, select a graph format from the menu, click to get graph
- Export list report data to Excel and use Excel analysis tools/graphs
- Supports Crystal Reports/Business Objects

Customisation

- Screens and views layout easily customised to new departments and new types of departmental responsibility
- Reporting tools mean that new business processes can also have new reports.
- IT experts have access to database for further customisation, integration, data export, and building extra windows for new processes. Integrators' toolkit sold separately

Case Studies

University of Manchester

The DSO has been using Maximizer as its main disabled student database since 2002, initially within the DSO only but more recently this has been expanded across the University. It has enabled us to manage the very large number of student records, allowing access simultaneously to staff and also enabling us to keep up-to-date and accurate records of all of our student interactions. This has meant that we can be more responsive and efficient than if we were using paper files only, and our processes have been simplified and streamlined as a result.

Disability Support Office

Leeds Metropolitan University

Replacing a mix of IT and paper processes, the Maximizer database system has helped us improve the quality and professionalism of what we do. We have been using the system for 8 months. We now deliver a far better student service experience than ever we could using paper. Our students know that we care because we always have their information to hand and it doesn't matter who they talk to. The StudentRelate consultant made it easy to implement our processes immediately. We started in mid-July. Given the complexity of what we do, we were surprised to see the project completed by mid-September.

John Reaney, Disability Services Manager

University of Salford

We use Maximizer to manage our student caseload for 13 different services within Student Life, handling 23,000 cases per year using the workload management functions. Services include; careers, counselling, disability, guidance, incident logging, care leaver cases, healthy lifestyles, interlink, confidential complaints, mentoring, Student Life hosts, Student Life Newsletter. Student data feeds from Banner and is planned to be 2-way in the future. We will also be introducing web forms and card readers to monitor student attendance at events.

*Peter Martin, Projects Team Officer,
Student Life Directorate*

JI Software

Developers and implementers of StudentRelate projects. Maximizer business partner for over 20 years. Sole software developer of StudentRelate add-on modules for Maximizer. Authorised to develop additional bespoke business process windows for Maximizer

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