

# STUDENT INFORMATION SYSTEM BUYER'S GUIDE

*As of July 3, 2019*

Researching, evaluating, and selecting a Student Information System can be a daunting task.  
You don't have to do it alone! We're here to help you in the process.

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## Introduction

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A Student Information System, or "SIS", is a crucial component in every educational institution. A Student Information System is a software solution that stores and manages all student information, such as grades and attendance, beginning when the student first submits their application form all the way to when they receive their diploma or degree. An SIS is the foundation of school and student management, and the system you choose will have a tremendous impact on your institution (but hey, no pressure!). It is important to remember that you are not just looking for a student information system. You are looking for *solutions*.

The software selection process is often a long process and it can be overwhelming (and exhausting). There is so much information available that it becomes difficult to know where to even begin. If software is not your thing, that's ok! It doesn't need to be... Because software is OUR thing! Every educational institution is unique, and each one has unique needs. This Student Information System Buyer's Guide was made to help you through this process. Use this guide to assist you as you research potential SIS solutions for your institution. This guide covers some of the most important features of Student Information Systems and the important things that should be considered when evaluating potential SIS solutions for your institution.

## User Roles & Activities

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Typically, there are four distinct users that interact with an SIS. Each of these users plays a role within the system and each role experiences the system in a different way. The four primary types of users that make up an SIS are Administrator, Instructor, Student, and Parent. Each user has a different set of activities that are unique to their role. Each role and the activities associated with that role need to be considered during the selection process.

The graphic below displays each user

role and some of the main activities and needs of the role.

Admin	Instructor	Student	Parent
<ul style="list-style-type: none"><li>•Reporting</li><li>•Account Management</li><li>•Degree Audit</li><li>•Student &amp; Teacher Management</li><li>•Simple Methods of Mass Communication</li></ul>	<ul style="list-style-type: none"><li>•Course / Class Management</li><li>•Course Content Management</li><li>•Grading &amp; Assessments</li><li>•Attendance</li><li>•Virtual / Online Learning</li></ul>	<ul style="list-style-type: none"><li>•Online Courses &amp; Course Content</li><li>•Student Social Network</li><li>•Communicate with Instructors &amp; Administrative Staff</li><li>•Schedule and Calendar for events</li></ul>	<ul style="list-style-type: none"><li>•Online Portal</li><li>•Online Payments</li><li>•Ease of Use</li><li>•Readily Available Information Displayed</li><li>•Efficient Communication</li></ul>

It's important to remember that each role and the experiences or activities associated with that role is unique to itself. This is better understood by further grouping the initial four user roles into just two separate groups based on commonality and shared activities. The two groups are Organizational users and Non-Organizational users. Administrator and Instructor would fall under "Organizational", as these roles are internal roles that belong to the organization, or institution, in this case. Student and Parent would fall under "Non-Organizational" users. Nonorganizational users are users which do not belong to your institution. When grouped together in this manner, the roles and the experiences, expectations, and activities of the roles become more clear, more defined, and easier to understand.

As you read through the next section and develop your hierarchy of needs, you should keep in mind the roles and needs of SIS users within and without your organization, making sure no user experience is neglected in your selection process.

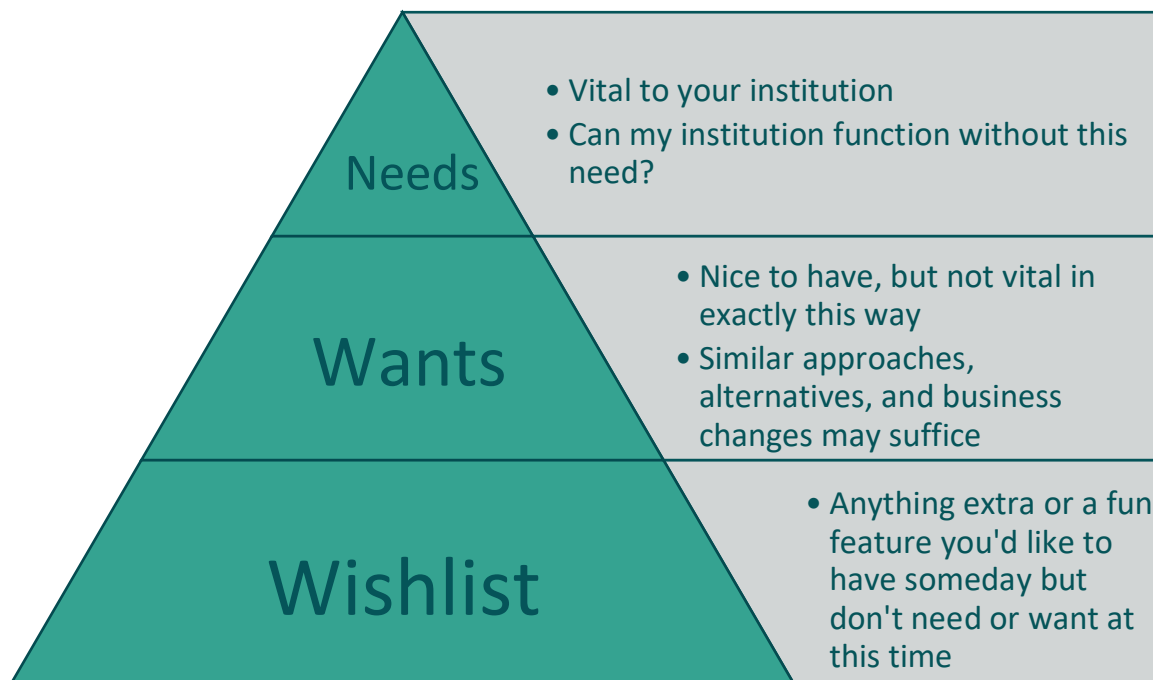
## Developing a Hierarchy for Your Needs

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Developing a hierarchy of needs during the discovery process helps to establish order and structure, group and/or sort information more effectively, and can assist in the decision-making process. Humans are visual learners. Having a visual aid can help you enormously during this process. Additionally, the structure that a hierarchy provides helps to reign in your thoughts and to keep the content focused. Get all those ideas, concepts, and thoughts out of your head and put them in front of you. There is one key thing that is commonly overlooked during the discovery process – The discovery process is as much for you and your institution as it is for us. It helps you to understand your institution better and can highlight some areas that could be improved upon, all while you are "nailing down" your business practices and processes. If you are a person who likes to conceptualize, visualize, strategize, compartmentalize, and whatever other "-ize" you can think of, this next part is for you.

## Conceptualize

The first step in developing a hierarchy for your needs is to establish exactly what your needs are. This is more easily understood by using a pyramid for your hierarchy of needs structure. The pyramid is divided into three tiers – Tier 1, Tier 2, and Tier 3 (appropriately named, don't you think?). Tier 3 is the base of the pyramid. This is for your "wishlist" items. These are items that are not necessary to run your institution. They are the bells and whistles that would be nice to have but are not vital to running your institution. Tier 2 in the next layer. This is for your wants. Features or functions that are not necessarily vital to running your institution but are items you would like to have. Lastly, Tier 1 is the top layer and is for your necessities. These are items that are imperative to running your institution – you could not function without these items. A question to ask yourself during this process is, "Is this vital to run my institution?" If the answer is yes, the item would be a Tier 1 Need. If the answer is no, then ask yourself, "What would change if I was not able to have this function?" Depending on your answer to that question, the item will be categorized as either a Tier 2 Want or Tier 3 Wish. Now is the time to make some potentially difficult decisions. But, they have to be made. Not everything can be a Tier 1 Need. No solution is perfect.



Keep in mind that all of your needs, wants, and extras (or wishlist items) should be expressed as exact and precise statements. “I need to be able to take attendance” is not as helpful in making a decision as “I want my teachers to be able to take attendance at the start of each class using a smartphone or mobile device, able to check off the status of each student (present, absent, tardy, etc.) and add comments if need be”. Just imagine a page full of statements like the former versus a page full of statements similar to the latter and think which would be more useful in determining if a specific SIS meets your needs or wants. Go ahead and write down literally *everything* you can think of for every component of your SIS that you need or want. Once you have everything written down, proceed to identify which are needs, which are wants, and which are wish list or extra features. You should have more wants than needs and more extras than wants when you’re done. If you don’t, it’s time to either make some hard decisions or try and figure out what you missed when writing your statement of needs and wants.

## What to Look For

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This section includes the most popular and most commonly included features of Student Information Systems. It does not cover every possible component or feature of Student Information Systems. Here are some things to consider and questions to ask when evaluating potential solutions.

### Admissions

The admissions process has evolved immensely over the years and has become a primary focal point of institutions. As rapidly as education evolves, software is never far behind. To meet these ever-evolving needs, many systems now include a Customer Relationship Management (CRM) system and/or a form engine. A CRM is a system that helps you manage, nurture, and grow your business relationships using the data you've stored. The better you can relate, the better the relationship will be. A form engine is a program that allows for dynamic and complex form creation and data processing. Considering the admissions process relies heavily on

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application forms, the importance of a form engine cannot be stressed enough. Having the ability to create, manage, and configure forms is a valuable asset to an institution, and it can help set you apart from other institutions. A CRM and a form engine are individual tools, each with pros and cons. No need to decide which is needed for your institution though. A number of systems have taken the best and most essential functions of both programs and have combined them to create an admissions module that is optimized for education. In addition to managing relationships and creating forms, some systems now offer a scheduling component for interviews or meetings with prospective students, sending of email and SMS messages and much more. With all the features available in current systems, think of the module as a "Lite CRM". Having a Lite CRM built in to your SIS allows you to manage the entire admissions process from scouting prospective students all the way to enrollment in a single location and allows you to keep an open line of communication and build relationships with them. Every student starts at the admissions process. Your SIS should start there, too.

## A Comprehensive Solution

Student Information Systems have evolved far past what their name suggests. In addition to a traditional SIS, many systems now include dedicated modules with key features and functionalities of Learning Management System, Customer Relationship Management systems, and/or Classroom Management systems – some even have finance modules which allow for invoicing and taking online payments, complete with a general ledger for your accounting needs! The system should track the entire student lifecycle from pre-admissions all the way to graduation. If your institution maintains a relationship with students after graduation, then the system should have a module for managing alumni. Finding a comprehensive solution for your institution and for all users is a Tier 1 Need. The system should keep detailed, comprehensive student records and be able to display that information in a variety of different, effective ways. It is called a Student *Information* System, after all. Each and every piece of information that you collect helps you better understand your students and can help you realize pitfalls and shortcomings that may exist within your institution. Collecting data is the easy part. How you



utilize that data to improve is the challenge. The system should have built-in analytics, reporting, and various dashboard tools to help you create a better student experience, increase retention rates, and most importantly, help your students succeed.

## Assessments, Grading, and Attendance

Comprehensive modules are becoming increasingly common. Comprehensive modules allow the user to manage a number of various tasks all from one place. Considering it's the title of this section, we will go ahead and use assessments, grading, and attendance as an example. For instructors, having a dedicated module for creating and managing assessments and other course content can make a world of difference on its own. Throw in a grade book and an attendance tracker into the same module and you've got the attention of your instructors. Three of the most common, yet cumbersome, activities for an instructor just got a little easier. Housing all these functions in one module cuts down on the time spent alternating between apps and windows, leading to increased efficiency and accuracy. When evaluating assessments, grading, and attendance module(s) in potential solutions, be sure to investigate what grading methodologies the system allows for, such as grading scales, rubric, percentage-based, point-based, and/or manual grading. Other functionalities to look for are if the system allows for weighted grading, customized grade calculation, grading periods, and student transcripts. When evaluating for attendance, look for methods other than manual entry that can be used to expedite or automate the attendance-taking process.

For example, some systems now have the ability to take attendance via QR Code or Bar Code, allowing instructors to scan the code with their smartphone and have the information transferred right into the SIS.

## Learning Management System

A Learning Management System, or "LMS", is used for administering, tracking, reporting, and delivering educational resources and content, such as lecture notes, quizzes, and more.

Learning Management Systems used to be entirely separate systems from an SIS, posing a whole world of integration challenges. As we discussed earlier, having data stored in multiple places often leads to diminished data integrity which can require several hours to correct, organize, and review. Nowadays, many student information systems have a built-in LMS,

which allows for more time to dedicate to more pressing tasks, as well as to their students. Having an LMS built in to the SIS is a great feature, but that's not the end of the discussion. You

must evaluate each system individually, as well as together. Aristotle famously said that, "The whole is greater than the sum of its parts." However, Aristotle didn't know a thing about software. (Sorry, Aristotle. No offense, really!) Just because the systems are "combined" does not

mean the problem is solved. Make sure the integrated LMS still meets all of your Tier 1 Needs and/or Tier 2 Wants - Can instructors post video lectures, homework assignments, and administer quizzes or exams? Can the instructors communicate with students? Does it offer

online courses? Does it offer private or semi-private online tutoring?

## Integration

Having to use multiple software and systems guarantees, if nothing else, the loss of integrity of your data. Managing data stored in separate locations is something that precisely zero people desire to be tasked with. Finding an SIS that can easily integrate with other programs and systems that your institution already uses, such as Office365 or Google Apps, is typically a Tier 1 Need. (And, yes, we will continue using this terminology!) Having your systems communicate is not a luxury in 2019. With the countless number of systems out there today, communication between them is becoming increasingly more necessary, especially with the rise of "Niche apps". Niche apps focus on a single, specific area, process, or function, and are designed solely for that purpose. The goal is to be the best product available for that specific need. The approach is simple: do exactly one thing and do it well - do it better than it's ever

been done. An example of a niche app is Tatchat. Tatchat is a mobile social tattoo chat app that is solely for people with tattoos. What can you do on Tatchat? With Tatchat, you can:

1. Upload a photo of your tattoo to Tatchat and chat with people about your tattoo or tattoos in general.

That's it. There is no additional functionality in Tatchat. This is an extremely basic example of a niche app, but it gives you some idea as to what exactly a niche app is. A more pertinent example of a niche app would be USA Scheduler. USA Scheduler is a master schedule building software. The software does not do anything outside of scheduling. The team spent years developing their product and perfecting the algorithms for conflict-resolution, boasting a best-in-class scheduling conflict resolution rate. With niche apps becoming more common, integration is more important than ever. You need an SIS that can integrate with many other applications at a high level. What does that mean exactly? A high-level of integration means having an API (Application Programming Interface) that covers basic functionalities. There should be documentation for most (if not *all*) of your needs, ranging from simple and common to rare and complex. If you can't find the documentation for what you need, the company should be able to provide that for you. For this reason alone, you want to find a company or vendor that has an in-house API developer who specializes in API development that can assist you in all your potential integration needs. It's better to have a good solution that integrates fully with the rest of your software, than a great one that lives on an island.

## Scheduling

Scheduling is one of the biggest pain points for institutions. With hundreds, even thousands, of students, and dozens of instructors and courses, it's not hard to see why. Having an SIS that more closely resembles and functions as a school management system can alleviate this pain point, along with many others you may feel at your institution. Eliminate the time spent, the stress, and the headaches that scheduling causes by offloading the task to a scheduling software. Make your problems the scheduler's problems! However, with the rise of unified software solutions, which aim to bring together separate software and additional components and features of a certain area and house them under one roof, certain aspects or features sometimes have to be trimmed down in order to make it work.

One such area that often gets trimmed down is scheduling. It's becoming less common for an SIS to have a scheduling builder. Many systems that boast of a scheduling component often include a scheduler holder rather than a schedule builder. One thing that you want to be sure of is that the product creates a solution, not a problem, because honestly, who has time for that? Well, with all the time you'll save by having a scheduling software, you will, but who *wants* to have more problems? A schedule holder simply displays a schedule that you have built. All the work is still done by you. A schedule builder does exactly what the name implies. It builds a schedule. Input the information and that's it. The software will build the schedule for you. No additional manual processes are needed. Bonus points if it offers conflict resolution. You may be wondering why 'resolution' is underlined. That's simple, really. The system should *resolve* conflicts, not just alert you of conflicts that arise while leaving the actual task of resolving them up to the user to do manually. This still requires a good deal of manual intervention, and every minute spent on resolving conflicts is a minute that could have been spent running your institution or assisting your students. If the scheduling solution offered in the SIS is not sufficient, then one must look to other solutions and find one that can integrate with the system.

## Invoicing & Payments

One thing that everyone can agree on is that money is important. It is what allows your institution to exist! For this reason alone, a built-in invoicing module and/or payment gateway integration should be considered Tier 1 Needs. However, this one is strictly up to you as some institutions have processes for this already in place outside of an SIS and some don't need to worry about this kind of thing at all. You should also consider *how* you collect your payment from students and/or parents. Do you invoice, or do you apply balances that the students make payments against? Is there a payment plan system or do you only take payment in full? An ideal invoicing module should meet your specific billing needs. If it can also integrate with payment gateways to take online payments then which payment gateways, such as Stripe, can it integrate with? Does it display alerts for students with past-due invoices and accounts? Can you send email notifications and reminders to students and/or parents? Does it allow for partial, full, or recurring invoicing and/or payments? The system should provide enough tools to increase collections, decrease accounts receivable, and manage students' accounts. Again, the importance of an invoicing module is strictly yours to decide. If you are open to suggestions, having a complete and comprehensive view of a student's financials readily available is priceless.

## Additional Questions to Ask

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Beyond an SIS meeting your hierarchy of needs, here are some additional questions you should ask of each potential solution.

### Does it work for everyone?

The SIS you choose for your institution should work for all users, from students and parents to high-level administrators – *and everyone between!* It should fulfill the needs, both individual *and* collaborative, of each department that will be working in the SIS. It should be intuitive and simplistic, allowing the most non-tech-savvy users to accomplish what they need to, yet powerful and in-depth enough for technical experts and power users to obtain what they need from the system. Review your particular roles as discussed before and make sure your hierarchy of needs is covered for each user type.

### Does it offer customization and flexibility?

From structure and processes to courses offered to student demographics, every institution is unique. Does the SIS offer enough flexibility that your institution or staff members do not need to alter processes or practices, and can continue business as usual? Does the system offer customization, such as White Labeling, which allows for using your logo, school colors, your own URL, etc.? There does not have to be a single mention of the software company anywhere on the site. It is your brand; your experience. True white labeling will make the website feel like it's your own. Determine what level of customization you will need and that will help you when evaluating systems. Not every feature offered is pertinent to every single institution.

## Will the system increase productivity?

One of the main things that an SIS should do is increase productivity. The system should be easy enough to use and have enough automation built into it that it allows for you to focus on what's really important – the students and running your institution! The entire point of an SIS (or a good SIS, at least) is to help manage your institution, which means making processes easier, as well as automated when possible. It should be (nearly) a one-stop shop, packed with a multitude of features and tools to help make life easier for all users.

## What is the total cost of ownership?

The bottom line is that it's about the bottom line. Two of the main costs associated with purchasing a student information system are the implementation (standing up the SIS) and the configuration of the SIS. However, there are other additional costs which are not as direct or tangible as implementation and configuration. Some of these intangible/indirect costs are the loss of students (aka revenue) due to an unsatisfactory student and/or parent experience. A question to ask is, "How much are we losing by NOT having an adequate SIS?" and the cost of labor/man-hours spent associated with the amount of time spent by administrative staff correcting, searching, and managing the data. If a staff member is spending two hours correcting data, that is two hours that are paid and could be spent doing something – *anything* – else. We can assist you in cost-benefit analysis to measure the potential benefits from various decisions made and determine if the benefits outweigh the costs incurred.

## Conclusion

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Selecting the right Student Information System for your institution is a long and challenging process, and the road to get to your desired destination is a bumpy one. Change up your method of travel. Let UniverseIT get your institution off the ground and take you beyond the clouds and to universal success.

UniverseIT can be your complete IT partner in Student Information Systems and beyond, and not just another single solution provider. If you're interested in learning more, why not contact us!

Email [sales@universeit.com](mailto:sales@universeit.com) or call us at 281-817-4004.

We hope that this guide assists you in finding your next educational technology solution and we here at UniverseIT thank you very much for lending us an ear, so to speak.