Changes to College Records Access Levels

Changes to the access levels for the College Records Student and Member eVision functionality and some College Record Reports have been agreed in consultation with the College Records User Group and are expected to go live in early February.

These changes will provide greater flexibility when deciding how to assign access to users. The main change is that users will need different access permissions for Student records and Member (i.e. staff and other member) records. In addition, new levels of access are being introduced to ensure that access to confidential and sensitive data can be restricted appropriately.

A summary of the access level changes is given below. There are no changes for the Collections or Groups functionality. However, please ensure that users with access to Groups also have read-only access to Students or Member records (see p. 11 for details).

Changes to Notes functionality

Changes to the Notes functionality will go live at the same time as the access changes. Depending on the user’s own level of access, they will be able to set an access level of Non-confidential, Confidential or Sensitive against a Note to control who can view the Note.

Action required

In order to make the transition to the new access levels as smooth as possible we have already deployed them to the Live system. Please assign these to users by Monday 5 February to ensure that they do not lose access to any eVision functionality on the planned go live date of Tuesday 13 February. The new access levels are currently inactive so users will not see any immediate change to their access levels.

The new access levels are:

- College Records: Manage Members – Sensitive (SVFC_MEM_SEN)
- College Records: Manage Students – Limited (SVFC_STU_LIM)
- College Records: Manage Students – Confidential (SVFC_STU_CON)
- College Records: Manage Students – Sensitive (SVFC_STU SEN)
- College Records: View Student Finance (SVFC_FIN_VEW)
The new access levels are temporarily labelled as “Inactive” in the Information Custodian functionality as shown below. These will be renamed when the eVision changes go live.

Add access permissions:

![Add access permissions](image)

**Detailed description of each Access permission:**

- **College Records: Emergency Contact Details**: Read-only access to emergency contact details for college members
- **College Records: Group View - Restricted**: View details of any restricted groups
- **College Records: Inactive - Members-Sensitive (SVFC_MEM_SENS)**
- **College Records: Inactive - Students-Confidential (SVFC_STU_CONF)**
- **College Records: Inactive - Students-Limited (SVFC_STU_LMT)**
- **College Records: Inactive - Students-Sensitive (SVFC_STU_SENS)**
- **College Records: View Student Finance (SVFC_FIR_VIEW)**

Please do not remove any existing access levels from users until the changes are live as they may lose access to functionality. However, please think in advance about the existing access levels which have been assigned to users in your college and be ready to remove these, if required, on the go-live date.

In some cases, users will require more than one access level. Details are given in the **Additional Role Group(s) required** column in the tables below (see pp. 5-7 and pp. 9-11).
Example:

Current access levels
A user has the following access levels so is able to update both student and member records:

- College Records: Students View (SVFC_STU_VEW)
- College Records: Members View (SVFC_MEM_VEW)
- College Records: Members: - Restricted (SVFC_MEM_RES)

Future access levels
If the user’s access levels are not changed they will continue to have update access to member records but will be able to view (but not update) student records.

In order to retain their update access to student records they will need to be assigned the following access level in advance of the changes going Live:

- College Records: Manage Students – Limited (SVFC_STU_LIM)

Depending on the required access level to the Notes functionality they may also need one or both of the following access levels:

- College Records: Manage Students – Confidential (SVFC_STU_CON)
- College Records: Manage Students – Sensitive (SVFC_STU_SEN)

If they are not required to view or update member records then the following access levels should be removed after the changes have gone Live:

- College Records: Members View (SVFC_MEM_VEW)
- College Records: Members: - Restricted (SVFC_MEM_RES)
### Access to Student records

The new access levels are summarised below, see the table on the next page for more details:

<table>
<thead>
<tr>
<th>Type of access</th>
<th>Original name</th>
<th>New name *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read-only</td>
<td><em>College Records: Students View</em> (SVFC_STU_VEW)</td>
<td>No change</td>
</tr>
<tr>
<td>Read-only</td>
<td><em>College Records: View Student Finance</em> (SVFC_FIN_VEW)</td>
<td></td>
</tr>
<tr>
<td>Read-only</td>
<td><em>SVFC College Alerts View</em> (SVFC_CA_VIEW)</td>
<td><em>College Records: View Student Record Changes</em> (SVFC_CA_VIEW)</td>
</tr>
<tr>
<td>Update</td>
<td><em>College Records: Manage Students – Limited</em> (SVFC_STU_LIM)</td>
<td></td>
</tr>
<tr>
<td>Update</td>
<td><em>College Records: Manage Students – Confidential</em> (SVFC_STU_CON)</td>
<td></td>
</tr>
<tr>
<td>Update</td>
<td><em>College Records: Manage Students – Sensitive</em> (SVFC_STU_SEN)</td>
<td></td>
</tr>
<tr>
<td>Update</td>
<td><em>College Records: Student Finance</em> (SVFC_STU_FIN)</td>
<td><em>College Records: Manage Student Finance</em> (SVFC_STU_FIN)</td>
</tr>
</tbody>
</table>

* the new access levels have already been deployed to the Live system. The new names will be deployed in early February and will replace the temporary names shown in the screenshots on p.2.
## New access levels for Student functionality

<table>
<thead>
<tr>
<th>Type of access</th>
<th>Role Group required</th>
<th>Additional Role Group(s) required</th>
<th>eVision access available</th>
<th>Reports available (see page 12 for details of content)</th>
</tr>
</thead>
</table>
| Read-only      | College Records: Students View (SVFC_STU_VEW) | None | The Manage Student Record link gives read-only access to the following tabs:  
* Assessments / Research *  
* Suspension  
* Supervisor/Advisor/Tutor  
* Address  
* Enrolment  
* Resources  
* Groups  
* Needs  
  * The Assessments tab is only displayed for students on taught courses, the Research tab is only displayed for research students | • Leavers Report  
• Students Report |
| Read-only      | College Records: View Student Finance (SVFC_FIN_VEW)  
This is a new Role Group.  
Please assign users before the access changes go live. | College Records: Students View (SVFC_STU_VEW) | **In addition to** the access provided by College Records: Students View, the Manage Student Record link gives read-only access to the following tab:  
• Fees | • Fees Report |
<table>
<thead>
<tr>
<th>Type of access</th>
<th>Role Group required</th>
<th>Additional Role Group(s) required</th>
<th>eVision functionality available</th>
<th>Reports available (see page 12 for details of content)</th>
</tr>
</thead>
</table>
| Read-only      | College Records: View Student Record Changes (SVFC_CA_VIEW)  
This is not a new Role Group but it requires users to be assigned to the new Role Group SVFC_STU_LIM.  
Please assign users to this before the access changes go live.  | College Records: Students View (SVFC_STU_VEW)  
AND  
College Records: Manage Students – Limited (SVFC_STU_LIM)  | In addition to the access provided by College Records: Students View and College Records: Manage Students – Limited users will also have read-only access to the following link:  
- Student Record Changes  | None |
| Update         | College Records: Manage Students – Limited (SVFC_STU_LIM)  
This is a new Role Group.  
Please assign users before the access changes go live.  | College Records: Students View (SVFC_STU_VEW)  | In addition to the access provided by College Records: Students View, the Manage Student Record link gives update access to the following tabs:  
- Supervisor/Advisor/Tutor  
- Resources  
- Needs  
- Notes*  
  * Users have access to view, add, edit or remove non-confidential Notes only  |  
- Student Contact Details Report  
- Member Contact Details Report  
- College Room List Report  
- Previous Institution Report  
- College Advisors/Personal Tutors Report  
- Labels Report  
- Students Report |
| Update         | College Records: Manage Students – Confidential (SVFC_STU_CON)  
This is a new Role Group.  
Please assign users before the access changes go live.  | College Records: Students View (SVFC_STU_VEW)  
AND  
College Records: Manage Students – Limited (SVFC_STU_LIM)  | In addition to the access provided by College Records: Students View and College Records: Manage Students - Limited, the Manage Student Record link gives additional access to the following tab:  
- Notes*  
  * Users have access to view, add, edit or remove confidential Notes  |  
- Suspended Students Report |
<table>
<thead>
<tr>
<th>Type of access</th>
<th>Role Group required</th>
<th>Additional Role Group(s) required</th>
<th>eVision functionality available</th>
<th>Reports available (see page 12 for details of content)</th>
</tr>
</thead>
</table>
| Update        | College Records: Manage Students – Sensitive (SVFC_STU_SEN) | College Records: Students View (SVFC_STU_VEW) AND College Records: Manage Students – Limited (SVFC_STU_LIM) | In addition to the access provided by College Records: Students View and College Records: Manage Students - Limited, the Manage Student Record link gives additional access to the following tab:  
- Notes*  
* Users have access to view, add, edit or remove sensitive Notes | None |
| Update        | College Records: Manage Student Finance (SVFC_STU_FIN) | College Records: Students View (SVFC_STU_VEW) AND College Records: Manage Students – Limited (SVFC_STU_LIM) | In addition to the access provided by College Records: Students View, the Manage Student Record link gives update access to the following tab:  
- Fees | • Fees Report |
Access to Member records (staff, other members and students)

Member records includes those for Staff, Other Members and Students. Users who do not have any level of student access will be able to view basic student details on the search results page but will not be able to view the records.

The new access levels are summarised below, see the table on the next page for more details:

<table>
<thead>
<tr>
<th>Type of access</th>
<th>Original name</th>
<th>New name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read-only</td>
<td>College Records: Members View (SVFC_MEM_VEW)</td>
<td>No change</td>
</tr>
<tr>
<td>Update</td>
<td></td>
<td>College Records: Manage Members – Sensitive (SVFC_MEM SEN) New access level is already Live with a temporary name (see p.2). New name goes live early February.</td>
</tr>
<tr>
<td>Read-only or Update</td>
<td>College Records: Emergency Contacts tab (SVFC_MEM_EMR)</td>
<td>College Records: Emergency Contact Details (SVFC_MEM_EMR) New name is already Live.</td>
</tr>
<tr>
<td>Access level is determined by user’s other permissions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Read-only or Update</td>
<td>College Records: Manage Employment Details (SVFC_MEM_EMP)</td>
<td>No change</td>
</tr>
<tr>
<td>Access level is determined by user’s other permissions</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### New access levels for Member functionality

<table>
<thead>
<tr>
<th>Type of access</th>
<th>Role Group required</th>
<th>Additional Role Group(s) required</th>
<th>eVision access available</th>
<th>Reports available (see page 12 for details of content)</th>
</tr>
</thead>
</table>
| Read-only      | College Records: Members View (SVFC_MEM_VEW) | None                            | The Manage Person Record link gives read-only access to the following tabs:  
  - Resources  
  - Groups  
  - Needs | None |
| Update         | College Records: Manage Members – Limited (SVFC_MEM_RES) | College Records: Members View (SVFC_MEM_VEW) | **In addition to** the access provided by College Records: Members View, the Manage Person Record link gives update access to the following tab:  
  - Notes*  
  * Users have access to view, add, edit or remove non-confidential Notes only | • Member Contact Details Report  
• College Room List Report  
• Labels Report |
| Update         | College Records: Manage Members – Confidential (SVFC_MEM_UNR) | College Records: Members View (SVFC_MEM_VEW) AND College Records: Manage Members – Limited (SVFC_MEM_RES) | **In addition to** the access provided by College Records: Members View, the Manage Person Record link gives update access to the following tab:  
  - Contact Details  
  - Notes*  
  * Users have access to view, add, edit or remove confidential Notes | None |
| Update         | College Records: Manage Members – Sensitive (SVFC_MEM_SEN)  
  * This is a new Role Group.  
  * Please assign users before the access changes go live. | College Records: Members View (SVFC_MEM_VEW) AND College Records: Manage Members – Limited (SVFC_MEM_RES) | **In addition to** the access provided by College Records: Members View, the Manage Person Record link gives update access to the following tab:  
  - Contact Details  
  - Notes*  
  * Users have access to view, add, edit or remove sensitive Notes | None |
<table>
<thead>
<tr>
<th>Type of access</th>
<th>Role Group required</th>
<th>Additional Role Group(s) required</th>
<th>eVision access available</th>
<th>Reports available (see page 12 for details of content)</th>
</tr>
</thead>
</table>
| Read-only      | College Records: Emergency Contacts (SVFC_MEM_EMR) | College Records: Members View (SVFC_MEM_VEW) | **In addition** to the access provided by College Records: Members View, the Manage Person Record link gives read-only access to the following tab:  
- Emergency Contacts | None |
| Update         | College Records: Emergency Contacts (SVFC_MEM_EMR) | College Records: Members View (SVFC_MEM_VEW)  
**AND**  
College Records: Manage Members – Limited (SVFC_MEM_RES) | **In addition** to the access provided by College Records: Members View and College Records: Manage Members – Limited, the Manage Person Record link gives update access to the following tab:  
- Emergency Contacts | None |
| Read-only      | College Records: Manage Employment Details (SVFC_MEM_EMP) | College Records: Members View (SVFC_MEM_VEW) | **In addition** to the access provided by College Records: Members View, the Manage Person Record link gives read-only access to the following tab:  
- Employment Details | None |
| Update         | College Records: Manage Employment Details (SVFC_MEM_EMP) | College Records: Members View (SVFC_MEM_VEW)  
**AND**  
College Records: Manage Members – Limited (SVFC_MEM_RES) | **In addition** to the access provided by College Records: Members View, the Manage Person Record link gives update-only access to the following tab:  
- Employment Details | None |
## Access to Groups functionality

There is no change to this functionality but please ensure that users have an additional Role Group of *College Records: Members View* or *College Records: Students View* in order to have full access to the functionality.

<table>
<thead>
<tr>
<th>Type of access</th>
<th>Role Group required</th>
<th>Additional Role Group(s) required</th>
<th>eVision access available</th>
<th>Reports available (see page 12 for details of content)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read-only</td>
<td>College Records: Groups View – Restricted (SVFC_GR_RSTR)</td>
<td>None</td>
<td>The <a href="#">View Groups</a> link gives read-only access to the Groups functionality.</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Users with this access level can view details of Unrestricted Groups only.</td>
<td></td>
</tr>
<tr>
<td>Read-only</td>
<td>College Records: Groups View – Unrestricted (SVFC_GR_ALL)</td>
<td>None</td>
<td>The <a href="#">View Groups</a> link gives read-only access to the Groups functionality.</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Users with this access level can view details of Unrestricted and <strong>Restricted</strong> Groups.</td>
<td></td>
</tr>
<tr>
<td>Update</td>
<td>College Records: Manage Groups (SVFC_GR_CREA)</td>
<td>College Records: Groups View – Restricted (SVFC_GR_RSTR)</td>
<td>The <a href="#">Manage Groups</a> link gives update access to the Groups and Privileges functionality. Users with this access level can view, create and edit Unrestricted Groups</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>To add Members to a Group (i.e. Staff and College Members), users will also need:</td>
<td>College Records: Members View (SVFC_MEM_VEW)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>College Records: Members View (SVFC_MEM_VEW)</td>
<td>Users do not need any other access to add Students to a Group.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update</td>
<td>College Records: Manage Groups (SVFC_GR_CREA)</td>
<td>College Records: Groups View – Unrestricted (SVFC_GR_ALL)</td>
<td>The <a href="#">Manage Groups</a> link gives update access to the Groups and Privileges functionality. Users with this access level can view, create and edit Restricted Groups</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>To add Members to a Group (i.e. Staff and College Members), users will also need:</td>
<td>College Records: Members View (SVFC_MEM_VEW)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>College Records: Members View (SVFC_MEM_VEW)</td>
<td>Users do not need any other access to add Students to a Group.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Summary of College Records Reports

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collections Report</td>
<td>Provides the outputs to enable the business to create room lists and validate against student lists to ensure all required students are undertaking the relevant collections.</td>
</tr>
<tr>
<td>College Advisors/Personal Tutors Report</td>
<td>Provides a list of all currently assigned college advisors (graduate students) or personal tutors (undergraduate students)</td>
</tr>
<tr>
<td>College Room List Report</td>
<td>Provides a list of all members currently assigned to any college rooms</td>
</tr>
<tr>
<td>Fees Report</td>
<td>Provides fee information for students</td>
</tr>
<tr>
<td>Labels Report</td>
<td>Provides name and correspondence address details for all current college members (including staff and students)</td>
</tr>
<tr>
<td>Leavers Report</td>
<td>Provides details of students whose course expected end date falls in a given period</td>
</tr>
<tr>
<td>Member Contact Details Report</td>
<td>Provides current contact details for all current college members (excluding Next of Kin)</td>
</tr>
<tr>
<td>Previous Institution Report</td>
<td>Provides a list of students and their previous institution</td>
</tr>
<tr>
<td>Student Contact Details Report</td>
<td>Provides name, current term-time address and current term-time telephone number for all students.</td>
</tr>
<tr>
<td>Students Report</td>
<td>Provides a list of all current students</td>
</tr>
<tr>
<td>Suspended Students Report</td>
<td>Provides details of students who are currently suspended or are due to suspend</td>
</tr>
</tbody>
</table>

Updated 24 January 2018