

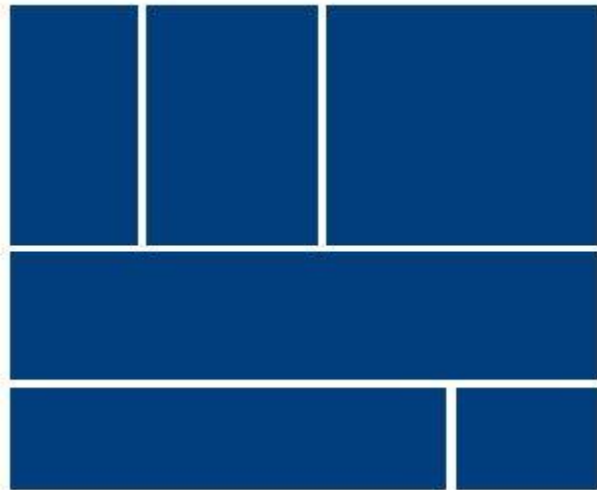
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# A REGISTRAR'S OFFICE DOCUMENTATION JOURNEY

NEACRAO'S ANNUAL CONFERENCE NEWPORT, RI 2018

PRESENTED BY EVELYN M. JIMENEZ, DOCUMENTATION MANAGER

FAS REGISTRAR'S OFFICE AT HARVARD UNIVERSITY



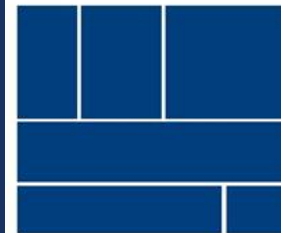
# NEACRAO

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Please be sure to fill out the session  
evaluation at:

**[neacrao.org/feedback/](https://neacrao.org/feedback/)**



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# What is the one thing that every employee asks for and every office wishes they had more of?



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# DOCUMENTATION

# WHY DOCUMENT?

history

training

instructions

Business continuity

legacy

Cross functional

# WHAT ARE SOME IMPEDIMENTS TO DOCUMENT?

time

limited resources

procrastination

“I’m not the expert”

Fear of job loss

# AGENDA:

- *Harvard FAS Registrar's office journey*
- *Choosing a platform and setting the groundwork*
- *Getting the office on board*
- *Hurdles or obstacles*
- *Security*
- *Demo*



# FAS Registrar's Office Journey

2014

- New Student Information System

2015

- Go LIVE!

2016

- Consultants in our midst

2017

- Office Reorganization



## DOCUMENTATION MANAGER JOB DESCRIPTION:

This position will work closely with Faculty of Arts & Sciences & University constituents (students, faculty, staff, alumni, & leadership) to enable the Registrar's Office to become a center of excellence for our constituents and systems in FAS, Harvard, and our profession, and to promote business continuity and functional cross-training.



# Choosing a platform and setting the groundwork



# Template



## INSTRUCTIONAL GUIDE

Name of Process:

Author:

Date original created:

Last Updated:

Check area that owns this process:

- Academic Planning
- Enrollment Services
- Information Records
- Other, specify:

Steps are delineated by a   - Field names are in **bold** - query names in **PURPLE CAPS** - navigations/URLs are in **red**

### Purpose:

Start text here.

### Timeframe:

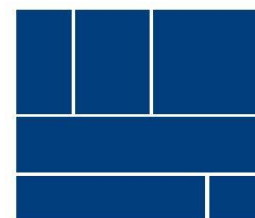
Start text here.

### Instruction:

#### Tools and Access needed:

Start text here.

- Easy to Read
- Consistent
- Tools and access
- Accessibility friendly



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# OUR FOLDER STRUCTURE



- Cross functional
- Breaking silos
- Processes over team functions

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## Getting the office on board:

- Management support
- Dedicated time
- Follow-up
- SharePoint news

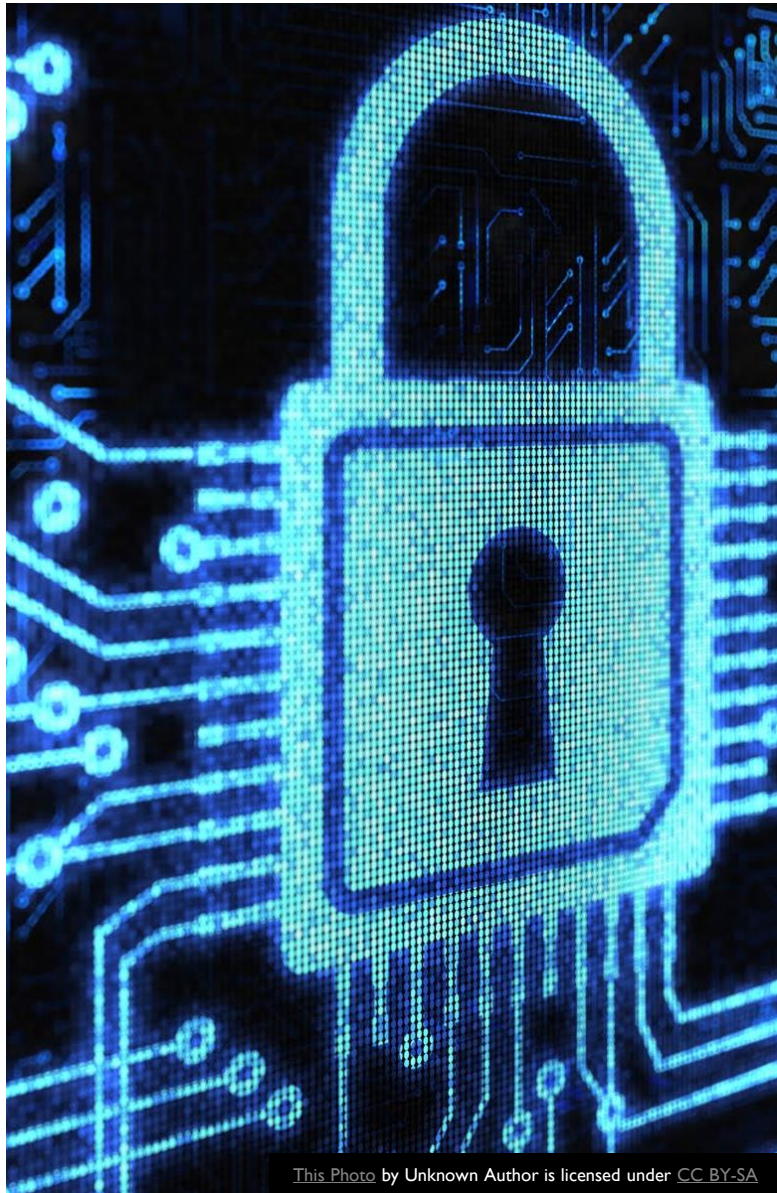
# Hurdles and Obstacles:

- Hoarding
- Job loss fears
- Keeping up with changes



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## THREE LEVELS OF SECURITY

Owners

Members

Visitors





# FAS RO Training and Documentation

Public group

Search this site

+ New

Home

Conversations

Announcements

Document Library

FAS RO Events Calendar

FAS RO Training Calen...

FAS RO Academic Plan...

FAS Academic Calend...

Site contents

Edit



## HARVARD Faculty of Arts and Sciences REGISTRAR'S OFFICE

Welcome to the FAS Registrar's Office Sharepoint site for sharing information and training documentation!

The quick links below will take our constituents to pages relevant to their areas or helpful information. Registrar staff use the "Document Library" link on the left side of the screen. The purpose of this site is to have a repository of documentation and calendars related to the operation of the RO and related constituent tasks.

### To Note:

- You can print a PDF of the course catalog by going to [portal.my.harvard.edu](http://portal.my.harvard.edu). Click on Course Search. Under Browse Courses, click on Faculty of Arts and Sciences, then click on the box "Course Catalog PDF".
- You can set up an alert that will email you when documents, a library, a folder, or announcements are changed. Just click on the ellipsis (...) to the right of the folder or document name and select "alert me". You can then choose how you wish to be alerted, email or text, and for which (or all) types of changes.
- Check out the "Announcements" link to the left for posted information or reminders.
- Calendars can be connected to an Outlook calendar. Just go to the desired calendar in Sharepoint, click on the "Calendar" tab at the top, and then click on "Connect to Outlook". You can then see the calendar in Outlook without opening Sharepoint.

### Quick Links To Information For Our Constituents:



For Program in General Education Office

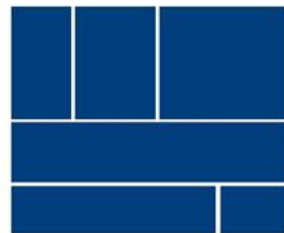


For Residential House Deans and Staff



For Curriculum Coordinators

- 
- Questions?
  - What documentation endeavors are you pursuing in your office?



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