Smarter School Administration

A practical guide to reducing administration, connecting systems and improving everyday processes in independent schools.

An independent schools guide for 2027

Prepared by DocTech | Document Management & Process Automation Specialists

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Introduction: Is Your School Getting the Most From Its Existing Systems?

Independent schools manage a substantial volume of information every day.

From pupil admissions and parental permissions to staff records, finance documents and regulatory requirements, the administrative workload can be considerable.

Most schools already have established systems for managing pupil, staff and financial information. However, the documents and processes surrounding these systems often still involve emails, spreadsheets, shared folders, manual approvals and duplicated administration.

Improving school administration doesn't necessarily mean replacing existing software. Often, it's about making your systems work better together.

At DocTech, we've spent 30 years implementing document management solutions, including projects for independent schools and further education organisations.

Our experience has shown that some of the greatest opportunities for improvement exist between departments and systems, where information needs to be collected, checked, approved, shared and stored.

In this guide, we explore how independent schools can:

- Reduce repetitive administration across departments.
- Improve the collection and management of pupil, parent and staff information.
- Connect documents and workflows with existing school management systems.
- Strengthen document security, access controls and digital archiving.
- Improve financial processes and approval workflows.
- Make better use of existing technology investments.

We'll also share practical examples from our work with **Strathallan School and York College**, demonstrating how education organisations are improving everyday operations.

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1. One School. Different Departments. Different Priorities.

Introducing new technology or improving administrative processes in a school can be more complicated than it first appears.

Schools often have several people involved in decisions about systems, processes and information management. Bursars, IT teams, admissions staff, HR, senior leadership and external technology advisers may all have different priorities.

From our experience working with education organisations, we've found that the same document management challenge can look very different depending on who you speak to.

For a Bursar, the priority may be reducing administration, controlling costs, improving financial oversight and ensuring processes are properly documented.

For an IT Manager, the focus may be system compatibility, security, access permissions and avoiding additional complexity.

For Admissions and Pupil Administration, the challenge may be collecting information from parents, following up missing documents and making records available to the right people.

For HR, it may be managing confidential employee records, onboarding, contracts and policy acknowledgements.

All these priorities matter, but they don't always lead to the same conversation.

Looking Beyond Individual Departments

A process that begins in admissions may involve finance, boarding staff, pupil administration and IT before it is complete.

For example, a new pupil registration may require:

1. Parents to complete registration forms and provide supporting documents.
2. Admissions staff to review the information.
3. Finance to receive relevant billing information.
4. Boarding or pastoral teams to access appropriate pupil details.
5. Supporting records to be stored securely and made available to authorised staff.

If these stages depend on separate emails, manual updates and multiple systems, administration can quickly become fragmented.

At DocTech, we look at the complete process, not simply the software requirement.

By understanding how information moves between departments, we can help schools identify opportunities to reduce duplication, improve handovers and automate repetitive tasks.

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2. Make More of Your Existing School Systems

Enhance Your MIS, Finance and HR Software Without Starting Again

Independent schools have often invested significantly in management information systems (MIS), finance software, HR applications and other specialist platforms.

These systems are essential to everyday school operations. However, they may not provide all the document management, digital forms and workflow functionality required by every department.

This can leave staff managing important supporting processes outside their main systems.

For example:

- Pupil records may be held in an MIS, while supporting documents are stored in shared folders.
- Parent forms may arrive by email and require manual processing.
- Supplier invoices may need approval outside the finance system.
- HR documents may be stored separately from employee information.
- Policies and permissions may require manual reminders and follow-up.

Connect Documents, Data and Workflows

DocTech has extensive experience integrating document management with ERP, finance and other business applications.

We apply the same approach to education, helping schools connect document management with the systems they already use.

A document management solution can provide additional functionality for:

- **Digital forms:** Collect information from parents, pupils, staff and suppliers.
- **Workflow automation:** Route documents for review, approval and follow-up.
- **Document storage:** Securely store and retrieve supporting records.
- **System integration:** Connect documents and relevant data with existing applications.

- **Document control:** Apply access permissions, audit trails and retention rules.

Where suitable interfaces and permissions are available, integration can allow information to move between document management software and other school applications, reducing manual handling.

Why Replace a System That Already Works?

When a school needs better document handling or approval workflows, replacing its existing management system may not be necessary.

A complementary document management solution can help address these requirements while preserving the school's investment in its existing software.

For some schools, this may reduce the need for an expensive upgrade or replacement project undertaken primarily to gain additional document-related functionality.

The important starting point is understanding what the current systems do well, where the gaps exist and how the applications can work together.

Real example: Strathallan School

DocTech integrated DocuWare with Strathallan School's existing iSAMS management information system, enabling the school to improve the management of supporting documents, digital forms and administrative workflows.

The project demonstrates how document management can complement an established MIS rather than replace it.

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3. Admissions and Parental Permissions

From Information Collection to Completed Records

Admissions and pupil administration involve far more than collecting registration details.

Schools may need to manage application documents, guardian information, medical details, permissions, financial information and supporting correspondence.

The challenge is ensuring that information is complete, reviewed, available to the appropriate staff and securely retained.

Simplifying Admissions Administration

Digital forms can replace paper-based or emailed information requests, making it easier for parents to submit details and supporting documents.

Once submitted, document workflows can be configured to:

1. Receive and identify the submission.
2. Assign it to the appropriate member of staff.
3. Highlight missing information requiring review.
4. Route documents for approval or further action.
5. Make relevant information available to other departments.
6. Store the completed record with appropriate access controls.

The school remains responsible for checking the accuracy of information and making decisions. The software helps coordinate the supporting administrative process.

Managing Parental Permissions and School Trips

Trip permissions, activity forms and guardian information can create substantial administration, particularly when information must be collected from hundreds of families.

Digital forms allow schools to collect responses electronically, while automated workflows can help staff identify outstanding actions and access completed records.

Depending on the process, this might include:

- Collecting permission for a particular trip or activity.
- Recording the response and relevant date.
- Notifying staff when information requires attention.
- Managing changes or missing information.
- Making the appropriate records available to trip organisers.
- Retaining the supporting evidence securely.

Different responses, such as approval, refusal or requests for clarification, should follow the school's agreed procedures.

Strathallan School: Digital Forms in Practice

Strathallan School uses DocuWare digital forms for a wide range of pupil and parent information.

Its workflows include practical activities such as notifying staff about pupil airport collections and setting reminders for future policy reviews.

The school has also developed the ability to create additional forms and workflows internally, allowing the solution to evolve as its administrative requirements change.

The benefit isn't simply replacing paper forms. It's connecting the information collected with the actions that need to follow.

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4. Staff Administration and HR Processes

Reduce Paperwork Across the Employee Lifecycle

Independent schools manage sensitive staff information, from recruitment and onboarding through to training, employment changes and leaving procedures.

These processes often involve several departments, including HR, line managers, payroll and IT.

A document management system can help coordinate the administrative work while maintaining controlled access to confidential records.

Staff Onboarding

A new employee may need to provide supporting documents, complete forms, review policies and receive relevant information before starting work.

Document management software can support the administrative process by:

- Collecting required information through digital forms.
- Routing documents to the appropriate reviewer.
- Notifying colleagues when an action is outstanding.
- Storing employment records securely.
- Recording policy acknowledgements.
- Making authorised documents accessible when needed.

The school must still complete its required employment, safeguarding and suitability checks. Document management software supports the handling of records but does not replace those responsibilities.

Managing Staff Records

During employment, schools may need to manage contracts, training records, qualification documents, policy updates and other personnel information.

Digital workflows can help track reviews and acknowledgements, while controlled document storage can reduce reliance on paper files and shared folders.

Staff Leaving Processes

When an employee leaves, HR, payroll, IT and other departments may all need to complete separate actions.

A defined workflow can help coordinate those tasks and maintain an appropriate record of completion.

Access removal and account administration must still be carried out through the school's relevant IT and identity systems.

A connected approach to HR administration helps schools manage documents consistently while keeping responsibility with the appropriate staff.

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5. Finance and Bursary Processes

Improve Financial Control Without Adding Administration

Bursars and finance teams are under continued pressure to manage resources effectively, maintain financial oversight and ensure that processes are properly controlled.

Yet many everyday finance tasks still involve manual document handling, email approvals and repeated data entry.

Document management and workflow automation can help schools improve these processes while working alongside existing finance applications.

Accounts Payable Automation

Supplier invoices often arrive in different formats and require several stages of processing before payment.

With a suitably configured solution, schools can:

- Capture incoming supplier invoices.
- Extract relevant invoice information using document processing technology.
- Route invoices to authorised approvers.
- Manage exceptions and outstanding queries.
- Link supporting documents to finance records.
- Maintain an accessible record of the approval process.

Integration with existing finance software may reduce duplicate data entry and improve the availability of supporting information.

Purchase Requests and Approvals

Purchase requests may need approval from department heads, finance teams or senior leadership.

Digital forms and workflows can provide a consistent route for submitting and approving requests, with supporting documentation retained for future reference.

Other Finance Applications

Schools may also benefit from improved document management for:

- Supplier contracts and agreements.
- Purchase orders and delivery documentation.
- Financial correspondence.
- Audit supporting records.
- Expense and reimbursement requests.
- Other document-heavy finance processes.

The appropriate workflow depends on the school's existing finance systems, authorisation policies and operational requirements.

The objective is to reduce repetitive administration while improving visibility and control over financial documents and approvals.

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6. Compliance, Document Security and Digital Archiving

Make Important Records Easier to Find, Control and Retain

Schools hold large volumes of personal and confidential information, including pupil, parent, employee and financial records.

These documents must be accessible when needed, but only to people with appropriate authorisation.

Paper archives, shared drives and disconnected storage locations can make this more difficult to manage consistently.

Secure Document Access

Document management software allows access permissions to be configured according to the school's requirements.

For example, HR records may be restricted to authorised personnel, while particular pupil administration documents may be accessible to designated staff.

This helps schools organise information according to departmental responsibilities and the sensitivity of the records.

Digital Archiving and Retention

Schools need to consider how long different types of information should be retained and what happens when records are no longer required.

A configured document management system can support:

- Searchable digital archives.
- Defined access permissions.
- Document histories and audit information.
- Retention rules and review processes.
- Controlled handling of records requiring disposal or continued preservation.

Retention periods should reflect the school's approved policies and applicable legal requirements. Pupil, staff and financial records will not necessarily have the same retention requirements.

Supporting Inspections and Information Requests

When information is stored consistently, authorised staff can retrieve supporting records without searching multiple folders or relying on individual colleagues.

This can be valuable during audits, inspections and internal reviews.

However, the software does not itself establish compliance or guarantee an inspection outcome.

Schools remain responsible for their safeguarding, data protection and recordkeeping obligations.

Good document management supports good governance by helping schools maintain reliable, accessible and appropriately controlled records.

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7. Real Results: Document Management in Education

Strathallan School: Connecting School Systems, Digital Forms and Administration

Strathallan School is a Scottish independent school managing substantial volumes of pupil, parent, staff and operational information.

Before implementing DocuWare, the school relied heavily on paper records and manual administration, with physical archives occupying significant space.

Working with DocTech, Strathallan introduced DocuWare and integrated it with its existing iSAMS school management information system.

The solution has expanded to support approximately 30 digital forms, automated workflows and 14 departmental digital filing cabinets.

At the start of the 2023 academic year, the school processed more than 7,000 digital forms.

How Strathallan Uses DocuWare

- Pupil registration and parent information collection.
- School trip and guardian permissions.
- Staff onboarding and HR documentation.
- Policy reviews and administrative workflows.
- Department-specific document storage.
- Secure access and retention management.
- Integration with its existing iSAMS system.

The school can also create and manage additional digital forms and workflows internally, helping it adapt the solution as requirements change.

The Benefits

Strathallan has reduced its reliance on paper, improved the accessibility of information and introduced more consistent document processes across departments.

The integration with iSAMS is particularly important, demonstrating how document management can enhance existing school management technology.

Read the full case study: https://www.doctech.co.uk/success-with-strathallan

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York College: Improving Finance, HR and Student Records

York College provides another example of how document management can improve administration across an education organisation.

When the college moved from five buildings to a single campus, reducing physical document storage became a priority.

Working with DocTech, the college introduced DocuWare to digitise records, improve information access and reduce its dependence on paper archives.

The solution was implemented across finance, HR and student records, including integration with the college's accounting software and UNIT-e student management system.

Project Highlights

- 150,000 documents digitised before the campus move.
- Document management introduced across multiple departments.
- Integration with existing accounting and student management systems.
- Controlled access to confidential employee information.
- Reduced physical document storage.

The Results

York College reported a **50% reduction in time spent searching for files**, helping staff retrieve information more efficiently.

The project demonstrates how document management can support a large education organisation while working alongside established finance and student information systems.

Although York College operates in further education rather than the independent school sector, many of the document management challenges are similar.

Read the full case study: https://www.doctech.co.uk/success-with-york-college

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8. Implementing Document Management in Your School

Start With One Process. Build From There.

Improving document management doesn't mean every department needs to change its processes at once.

At DocTech, we recommend beginning with a clearly defined administrative challenge and understanding how the current process works.

For example, a school might start by improving:

- Parental information collection.
- Supplier invoice approvals.
- Staff onboarding documents.
- Pupil record storage.

- School trip permissions.

The next step is to understand who receives the information, who reviews it, what decisions are required and where the completed record needs to be stored.

A Practical Approach

1. Identify the problem

Which process creates unnecessary administration, delays or difficulty accessing information?

2. Understand the existing systems

Which MIS, finance, HR or other applications are already in use? What functionality do they provide, and where are the gaps?

3. Map the document process

Identify how information is collected, reviewed, approved, shared and stored.

4. Assess integration opportunities

Explore whether document management can connect the process with existing applications, subject to available interfaces and access permissions.

5. Implement and test

Introduce the agreed forms, workflows, document storage and access controls. Test normal processes and exceptions before wider adoption.

6. Expand where appropriate

Once the initial process is working effectively, consider other departments that could benefit from the same approach.

Working With Your Existing IT Provider

Many independent schools already work with external IT advisers or managed service providers who understand their infrastructure and technology requirements.

Introducing document management doesn't necessarily mean changing these relationships.

DocTech specialises in document management, workflow automation and system integration. We can work alongside a school's existing IT team or technology provider, bringing specialist expertise to the project.

This collaborative approach helps schools improve document-heavy processes while maintaining established technology relationships.

9. Your School Administration Improvement Checklist

Where Could Your School Reduce Manual Work?

Use this checklist to identify areas where document management and workflow automation could make a difference.

Admissions and Pupil Administration

- Parent and guardian information can be collected digitally.
- Supporting documents can be linked to the correct pupil record.
- Staff can identify incomplete submissions and outstanding actions.
- Relevant information can be shared securely with authorised departments.
- Completed records can be retrieved without searching multiple locations.

Finance and Bursary

- Supplier invoices follow a consistent review and approval process.
- Purchase requests can be tracked from submission to approval.
- Supporting documents are accessible alongside relevant finance information.
- Manual data entry and duplicated administration have been reviewed.
- Finance records can be retrieved efficiently for audit purposes.

HR and Staff Administration

- Staff onboarding documents follow a defined process.
- Confidential employee information has appropriate access controls.
- Policy acknowledgements and reviews can be tracked.
- Employment documents are stored consistently.
- Staff leaving processes involve the appropriate departments.

Systems and Integration

- We understand which applications hold our key school information.
- We have identified processes that take place outside those systems.
- We know where information is entered or transferred more than once.
- We have considered whether document management could enhance existing applications.

- Our IT team or external technology provider is involved in relevant discussions.

Document Security and Compliance

- Staff can access the records required for their responsibilities.
- Sensitive information is restricted to authorised users.
- Document retention requirements have been reviewed.
- Important records can be retrieved for audits or inspections.
- We have a consistent approach to digital archiving.

If several of these areas need attention, your school may benefit from reviewing how documents and information move between departments and existing systems.

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10. About DocTech

30 Years of Document Management Experience

DocTech has been delivering document management solutions since 1984 and implementing DocuWare since 1996.

Over three decades, we've helped hundreds of organisations improve document storage, automate business processes and connect information with existing software.

Our experience extends across education, manufacturing, professional services, hospitality, finance and many other sectors.

This breadth of experience matters because schools face many of the same challenges as other organisations: disconnected systems, manual approvals, duplicated data entry and growing volumes of documents.

More Than Document Storage

We help organisations identify how document management can support their wider operations through:

- Document management and digital archiving.
- Digital forms and workflow automation.
- Intelligent document processing and data capture.
- Integration with existing business applications.
- Secure document access and information management.

- Implementation, training and ongoing support.

For schools, this means considering how document management can support admissions, finance, HR, pupil administration and other departments as part of a connected approach.

Experience You Can Build On

Our work with Strathallan School and York College demonstrates how DocuWare can support education organisations with different requirements, existing systems and administrative challenges.

We understand that every school operates differently, and the right solution needs to reflect its people, processes and technology.

Could Your Existing School Systems Be Working Harder?

You may already have the systems your school needs. The opportunity could be making the documents, information and processes surrounding them work more efficiently.

Whether you're looking to improve admissions, automate finance processes, manage staff records or connect documents with your existing MIS, DocTech can help you explore the options.

Book a School Document Process Review

Tell us about your existing systems and administrative challenges.

We'll discuss where document management could help reduce manual work, improve access to information and support the technology you've already invested in.

Contact DocTech

Email: info@doctech.co.uk

Telephone: 0161 647 7040

Website: www.doctech.co.uk

DocTech | Document Management. Workflow Automation. System Integration.

Further Reading and Resources

DocTech Education Case Studies

- Strathallan School: https://www.doctech.co.uk/success-with-strathallan
- York College: https://www.doctech.co.uk/success-with-york-college

DocTech Guides and Solutions

- Digital Forms for Independent Schools: https://www.doctech.co.uk/blog/digital-forms-for-independent-schools-doctech
- Document Management Integration: https://www.doctech.co.uk/document-management-integration
- Document Workflow Automation: https://www.doctech.co.uk/document-workflow

Education and Governance Resources

- Independent Schools' Bursars Association: https://www.theisba.org.uk
- Information Commissioner's Office: https://ico.org.uk
- Independent Schools Inspectorate: https://www.isi.net
- Department for Education – Keeping Children Safe in Education: https://www.gov.uk/government/publications/keeping-children-safe-in-education--2

Publication note: This guide provides general operational information and examples of potential document management applications. It is not legal, safeguarding or regulatory advice. Requirements vary across UK jurisdictions and individual schools. Integration capabilities and project outcomes depend on existing systems, available interfaces and agreed implementation requirements.