



Focus on: Southern Methodist University Dallas, Texas

Southern Methodist University has recently licensed and installed the Intersect Records Management System, joining the growing ranks of post-secondary institutions that are using Intersect's records management software.

A private University of 11,000 students on 186 acres located five miles north of downtown Dallas, SMU offers Bachelor's, Master's, and doctoral degrees through five undergraduate and graduate schools and two professional schools. The University also has campuses located on 295 acres near Taos, New Mexico, and on 18 acres in Plano, Texas.

SMU is noted particularly for its Cox School of Business, which is consistently recognized as a leader in business education by such publications as *Business Week*, *Forbes Magazine*, and *The Wall Street Journal*, and for the Dedman School of Law, which *U.S. News & World Report* ranks in the top tier of law schools nationally.

Typically, an organization will rely on a records manager for developing and maintaining a records control schedule, and for managing a records center. Intersect's Retention Schedule Manager (RSM) software for local governments and state agencies, and Retention Developer / Manager / Researcher (Retention DMR) software support the development of records control schedules using retention schedules published by the Texas State Library and Archives, and provided by Intersect Systems in digital format.

Intersect also publishes Clark's *Encyclopedia of Records Retention* for non-governmental organizations such as com-

mercial businesses and private institutions such as SMU. Both the RSM and Retention DMR software systems support the development of departmental sub-sets of the completed control schedule, a convenience for department managers since they can be provided with only the portion of a complete records control schedule that applies to their department — typically only a few pages — instead of the complete schedule for the organization, which can run to well over one hundred pages, and have a department's record information scattered throughout.

Southern Methodist University has taken a different and unique approach to applying Intersect's Retention DMR development software to meet the University's needs.

Originally Ms. Linda Wood in the University's HR department identified and selected the Intersect software to help meet their requirements for developing and maintaining a records control schedule. The license is a standard Intersect institutional license, allowing unlimited use of the software throughout the institution.

Mr. Weston Hebert, Associate Controller for the University, was aware of the capabilities of the Intersect retention software, and the terms of the license. He was interested in using the Intersect software to create a comprehensive records control schedule, incorporating all of the records of the various departments on the campus.

In a unique plan, Weston envisioned each department using the Intersect retention software and the research and query capabilities in the program to identify the records categories for that department. Then, the collection of seventeen individual departmental schedules could be easily used in a second application of the Intersect retention software to generate a comprehensive records control schedule for the Business and Finance Group, incorporating the records titles for each participating department.

To accomplish Weston's goal, two training classes were recently held with representatives of seventeen departments on the campus. A person from Intersect Systems introduced the attendees to the RSM software, which was subsequently installed on



The computer training classrooms in SMU's Fondren Library incorporate the latest technology, including large screen displays and networked computers.

a computer in each department. Each department representative was responsible for using the software to create a portion of a master records control schedule that applied to that person's department. At this point in late April, the component departmental schedules, now complete, are currently being reviewed. Any differences will be reconciled, and then the departmental components will be combined into a central master records control schedule.

Besides distributing the task of researching records categories to appropriate departments, there is another advantage to this approach. Through the research and development process, a records representative in each department of an organization becomes familiar with the retention process, and participates in the review and development of the resulting master records control schedule.

The unique SMU approach to developing a records control schedule with the initial active participation of various departments may be of interest to others with similar needs in large organizations.

As frequently happens with innovative and creative users, the SMU project has resulted in several suggestions to Intersect for features to be added to the retention software to facilitate this approach to developing a records control schedule.



Dallas Hall and fountain: Signature landmarks on the Southern Methodist University Campus