



# The Intersection

A Newsletter for the users of Intersect Systems Retention Schedule Manager software systems and Records Control and Management software systems

Arlington, Texas

Fall 2014

## In This Issue:

### Intersect User Focus

- Grand Prairie Independent School District Opens New State of the Art Records Facility 2

### Also in this Issue:

- Intersect Systems Contracts with Texas State Library and Archives Local Government Division to Convert Texas State Agency Retention Schedules to A Standard Format 1
- Issues with SharePoint for Records Management 1

### News and Updates

e-Records Conference 2014:  
"Collaboration in an RM-IT World"  
November 18, 2014  
Austin, Texas

[www.tsl.texas.gov/slrml/training/conferences/erecords2014.html](http://www.tsl.texas.gov/slrml/training/conferences/erecords2014.html)

Plan to attend and visit the Intersect Systems exhibit.

About Intersect Systems Inc. 4

Intersect Systems Inc. is a Texas-based company located in north Texas. Intersect specializes in developing software for retention schedule development, records management, and electronic document management.

The Intersection is published periodically by Intersect Systems Inc.

To add your name to the mailing list, e-mail Intersect at [intersect@newintel.com](mailto:intersect@newintel.com).

## Intersect Systems Converting Records Schedules For Texas State Library and Archives

Intersect Systems provides a special retention management software application as part of the RCAMS records management suite, and also publishes the Texas State Retention Schedules in a compatible format for use with the Intersect records database system. Intersect is also the sole publisher of *Clark's Encyclopedia of Records Retention* for businesses, as well as supporting other state retention schedules.

Perhaps as a result of Intersect's experience in this area, the Texas State Library and Archives, State and Local Records Management Division, approached Intersect in early 2014 about assisting TSLAC with a project to convert 158 Texas State Agency retention schedules to a standardized .csv format for use with a new records database system at TSLAC's Austin records facility.

Intersect already had experience in moving retention schedules developed and edited in the Intersect retention format to .csv files in order to support users of third-party data systems without retention management components for records management, including companies that are using Microsoft® Sharepoint®.

### SharePoint® for Records Management?

SharePoint, a collaborative environment closely related to Microsoft's Office, continues to present challenges to users attempting to use SharePoint as a records management system. One issue that is frequently mentioned is the problem of managing records retention. Assigning a retention period to a document is only one step in managing retention; a comprehensive retention management process requires the ability to recalculate disposal dates for all records of a particular record series if retention requirements change.

The conversion project is well along, with completion anticipated in early 2015.

While some of the 158 schedules already existed in the .csv format or equivalent, some of the schedules were in Microsoft Word® or in many instances in .pdf files, requiring text extraction and reformatting using Intersect's retention application. Since Texas Agencies periodically amend and extend their schedules based on various legal requirements as well as special needs, in a number of instances original .pdf files were no longer available, having been modified from time to time, frequently by appending earlier .pdf documents with scanned, embedded images of .pdf schedules to new additions in pure .pdf format, complicating the process.

The individual responsible for the conversion effort at Intersect notes that "...it has been an interesting project. It also underscores the value of a basic standard file format such as .csv (comma separated values) for long term compatibility — even though applications such as Excel® may not be the easiest choice for text entry in creating and editing retention additions."

Further, The ability to set legal or audit holds on records, or groups of records, and to release these as appropriate, is essential. Intersect Systems' Retention DMR / Retention Schedule Manager for Business, with *Clark's Encyclopedia of Records Retention*, offers a compatible resource to assist in this area. New features in the upcoming 2015 version will further enhance the capabilities of the Intersect retention application for businesses, with extended editing tools and format conversion options.

**Focus on:****Grand Prairie, Texas, Independent School District:  
New Grand Prairie ISD Central Records Facility**

Located in north central Texas in the western part of Dallas County with a population of 166,000, the city of Grand Prairie is conveniently located between Dallas and Fort Worth. The Grand Prairie Independent School District is a 58-square-mile district serving 27,740 students. GPISD has 2,885 employees, of which 1,660 are teachers. The District boasts 40 schools, including 24 elementary schools, seven middle schools, four high schools, a ninth grade center, three grades 6-12 schools, one grades 7-8 school, and one alternative school.

In 2013, the school board made a decision to create a central records management facility with the dual purpose of



New GPISD Records Facility



Loading / Unloading Docks

housing both physical records as well as serving as a school book depository, and in late 2013 purchased a suitable 4,000 sq. ft. building in the city for this purpose. Following initial planning, and as heavy duty shelving was being installed in the new warehouse, Ms. Dianna Drew of the Technology and Information Services Department began investigating software systems for records management for use at the new records facility. Following contacts with area school districts, the RCAMS Records Control and Management System developed by Intersect Systems Inc., a company based in the North Texas area, was identified as a preferred candidate.

Used by numerous Local Governments in Texas and several other states for records management by school districts, cities, and county governments, the RCAMS system also has the advantage of being under contract with the Texas Department of Information Resources. The Department of Information Resources contract offers a substantial discount to Texas Local Governments while avoiding the time-consuming RFP and competitive bidding process.

Intersect's RCAMS system has the further advantage of an integrated records retention management system to facilitate compliance with state and federal records management requirements. Intersect publishes and provides the Texas Retention Schedules with the Intersect system, greatly simplifying the task of managing physical and electronic records in a relational database system.

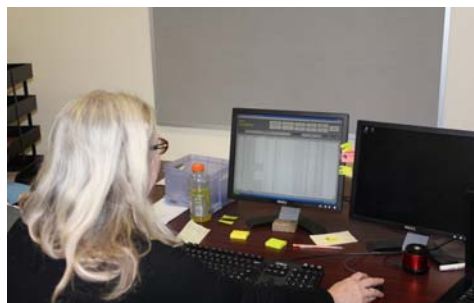
In addition, the RCAMS system is provided under a one time, paid-up institutional license, allowing unlimited installations of

RCAMS stations throughout an organization without the complication of per-station or per-seat accounting — a significant advantage when considering the need for numerous remote records inventory look-up stations in departments throughout GPISD. Further, the RCAMS system provides for managing not only physical records, but also includes a state-of-the-art Optical Character Recognition and electronic document scanning and indexing system — of possible interest for future applications in the school district.

The school district proceeded to license the Intersect RCAMS system in early 2014, and shortly afterwards Ms. Drew approached Intersect representatives with an unusual request: could Intersect provide an on-site team to manage the initial installation, configuration, and operation of the new records facility for a period of 90 days, to [\(cont. page 3\)](#)



Heavy duty shelving, electric mobile lift: ready to receive containers.



Lesla Walton at container receiving and data entry station, where box labels and bar codes are also printed and applied.



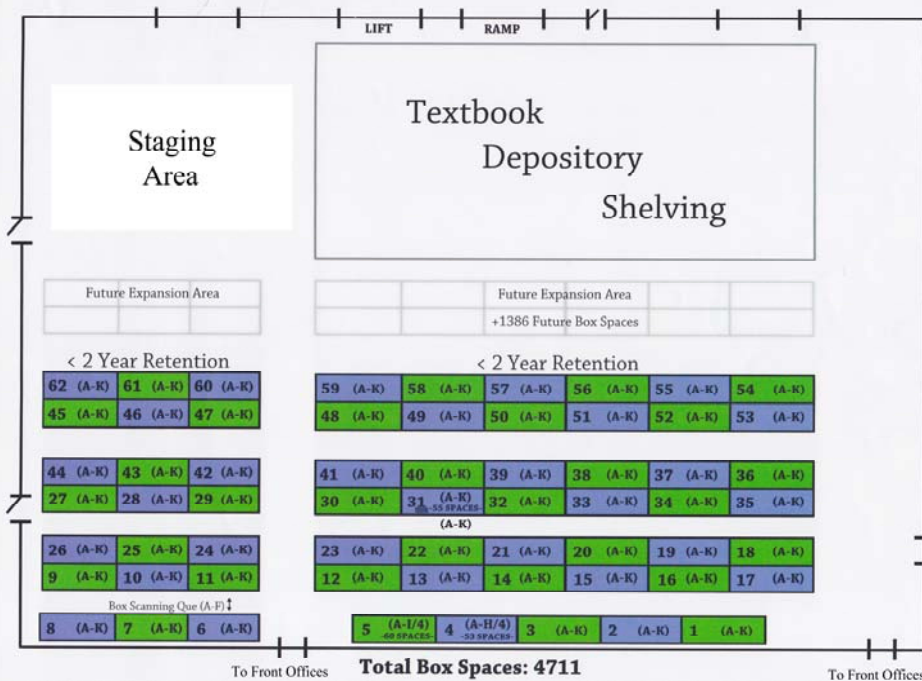
All shelf spaces are numbered with bar codes, and all containers are identified with a serialized ID.



Each container is assigned to a specific shelf location in the Intersect Systems records database.



Containers can be assigned and unassigned with a Wi-Fi connected laptop or tablet from the warehouse floor, or containers can be assigned using a display of empty spaces from the central records management station.



4,000 sq. ft. warehouse layout

help get the records facility up and running, while the district identified and assigned permanent staff members to the new records management department? Intersect would train the individuals assigned as they joined the team, and after the 90 day period, the records facility operations would be turned over to the GPISD records staff.

In addition, Intersect would prepare a comprehensive procedural document for GPISD, which would detail the overall operation as well as documenting established records management methods and processes, based on Intersect's experience over the past 24 years in supporting records management operations by Texas Local Governments. The document would also be the basis for a board policy for overall records

management in the school district.

After considering the unusual request, Intersect agreed, and the 90 day implementation project began on June 1, 2014.

Intersect assigned an on-site project coordinator, and Mr. Joe Harry, a long time Intersect associate, agreed to develop the procedural document based on his experience in consulting with numerous other Texas school districts on [\(cont. page 4\)](#)



Intersect's RCAMS is compatible with touch screen laptop or tablet Windows-based systems. An additional feature of the bar code system allows verification of containers eligible for disposal before shredding.



Keith Clark placing containers in assigned spaces.

## Intersect Systems Inc.



Post Office Box 540907  
Grand Prairie, Texas 75054-0907

Telephone: (972) 641-7747  
e-mail: [intersect@newintel.com](mailto:intersect@newintel.com)  
Internet: [www.intersectsystems.com](http://www.intersectsystems.com)

Microsoft, Microsoft Windows, Microsoft Office, and SQL Server are registered trademarks of Microsoft Corp.

Copyright © 2014 Intersect Systems Inc.

*Intersect Systems Inc. is a Texas corporation, founded in 1993, dedicated to the design and development of innovative computer software systems and applications for retention schedule development and management, and for records control and management, with an exclusive focus on proven approaches and user-friendly systems.*

*Intersect Systems develops software applications for both local governments and state agencies to help meet state requirements in maintaining records programs. Intersect also offers comprehensive records management systems for businesses, including Clark's Encyclopedia of Records Retention.*



GPISD Records Facility staff Keith Clark, Kaeli Pollard, and Lesa Walton



Warehouse capacity: 4,700 containers.  
Future expansion will add 1,386 containers.

### GPISD... (cont. from page 3)



Keith Clark processing remote records requests



MeShelley White in GPISD HR Department at Administration Building viewing HR records, and transmitting request for a document to records facility

their records management programs. Mr. Harry served as Records Management Officer at Arlington ISD for over ten years, and was responsible for the initial creation and organization of the AISD records management department.

With the shelving already in place, initial tasks for Intersect included software installation, followed by the design of suitable container labels,

defining a shelf space organization plan, and development of a shelf bar code configuration and format that would support the anticipated expansion of the facility in future years.

Container processing began almost immediately with initial deliveries of Human Resources records containers from storage in the Administration building.

A feature of the Intersect RCAMS records management system includes remote RCAMS Accession stations, located in various departments, which allow a department to review and locate specific containers and records belonging to that department, and to transmit requests for the particular container or record to the records facility. Only records belonging to a particular department can be viewed on an Accession station. The department's request is received at the records facility, where the record is retrieved and delivered to the requesting department. Records are checked out for a specific time period, and overdue records are monitored by the system. The Accession system is popular with Intersect customers, with

some installations having over 100 Accession stations in operation, and one installation having over 200. An initial training session in using Accession was held with the GPISD HR Department — the first of many department training sessions planned.

During the 90 day start-up period, Intersect and GPISD staff received, labeled, and entered over 2,500 containers into the GPISD records database — a substantial beginning accomplished in a remarkably short time. The new facility is rapidly approaching the initial 4,700 container capacity, and shelving has already been installed for the approximately 1,400 container expansion area (see facility layout on page 3).



Total containers received, entered into database, labeled, and shelved in initial 90 day start-up period: 2,550