

The Intersection

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

Grand Prairie, Texas

Volume 5

In This Issue:

Developments at Intersect: 1
Bar Code System for Container Management

Intersect Announces 1
Accounting / Statistics Module

Intersect User Focus: 2
Collin County Community College District

Intersect User Focus: 3
City of Plano, Texas

About 4
Intersect Systems Inc.

Contact Intersect Systems 4



In this issue:
Focus on
Collin
County
Community
College



In this issue:
Focus on City of Plano

The Intersection is published periodically by Intersect Systems Inc.

To add your name to the mailing list, contact Intersect at (972) 641-7747.

Developments at Intersect: Bar Code System for Container Management

A current project at Intersect is developing software extensions for the RCAMS container database system to support bar code functions for container management. The system will use a series of bar code labels for designating shelf spaces in a storage facility, and a separate series of bar code labels for designating records containers. A portable bar code reader will be used to relate each storage position to the container(s) in that position. This process will allow incoming containers to be immediately placed in an available shelf position, and the bar code container management system will then make the appropriate space / container assignments in the RCAMS database.

The bar code system can

also be used to reconcile actual containers / locations with the existing assignments in the RCAMS database, and will generate reports of any discrepancies.

The bar code reader is portable with a self-contained memory, and can be temporarily connected to a computer running RCAMS via a USB port for transfer of space / container information.

People behind the Software Special utility software supporting USB port data transfer between the bar code reader and the Windows operating system is being developed by Mr. Robert Perry, a specialist in data communications and hardware / software interfacing with over twenty-five years experience in developing real-time systems

and computer applications.

Recently, when Intersect published *Clark's Encyclopedia of Records Retention*, Bob solved the problem of transferring the Encyclopedia master — then in a word processing format — to a master electronic file by developing a program to transfer the Encyclopedia content while identifying and removing extraneous formatting information and codes.



Robert Perry at computer

Intersect Announces Accounting / Statistics Module

A new Accounting / Statistics module adds a comprehensive statistics, accounting, and reporting capability to Intersect Systems' *Records Control and Management System*.

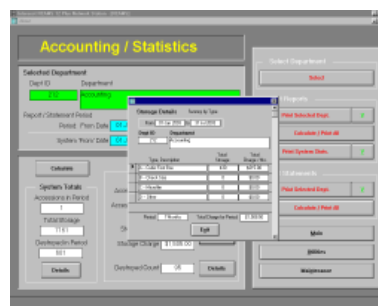
Developed at the request of Intersect customers, with capabilities and functions based on suggestions from RCAMS users, the new Accounting / Statistics module is designed to meet two needs: (1) *To record and report activity in the records center — both overall for the RCAMS system, and individually by departments or divisions.* The Accounting / Statistics module captures all records transactions in RCAMS — storage spaces used, records accessions, document

disposal — and provides a flexible set of reports the user can access through easy point-and-click operations to either view the reports on-screen, or print the reports. Each department can receive a periodic statement documenting space used and activity. (2) *To*

allow records center costs to be allocated to various departments or divisions based on storage space used, and on activity determined by records containers accessed. A statement of costs for storage and accessions can be calculated for each Department and printed periodically — monthly, quarterly, annually, or for any period desired.

The Accounting / Statistics module is not only easy to configure and use, it is also flexible. The records manager can specify charges for storage and accession for each type of container defined for the system.

Please contact Intersect for more information on the Accounting / Statistics module.



Accounting / Statistics Control Screen



Focus on: Collin County Community College



The Collin County Community College District includes five campuses in the cities of Plano, Allen, Frisco, Rockwall, and McKinney in north Texas. Academic courses in the arts and sciences are offered to prepare students for senior institutions; a variety of technical programs leading to associate degrees or certificates are offered as well. CCCCD offers a teacher certification program, and is the first community college in the nation to offer teacher certification for technology education. Enrollment in credit courses is currently at 16,000. In addition, continuing adult education programs provide opportunities for academic, professional, occupational, and cultural enhancement. CCCCD also provides conferencing facilities including conference rooms, classrooms, auditoriums, and on-site catering and A-V services.

CCCCD has several nationally recognized programs, achieving a National Bellwether Instructional Award for the Learning Communities program; a Campus



Peggy Browning and Tammy Brown retrieving document in storage area

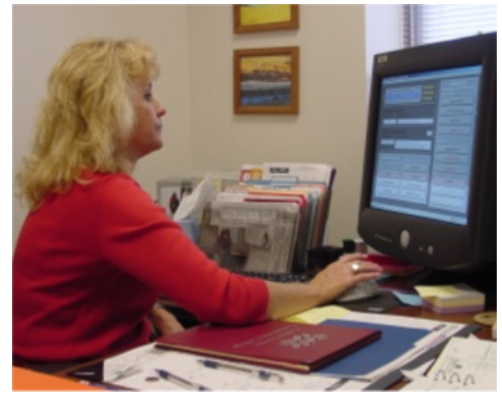
Compact's National Collaboration Award for Service Learning; an AAUW Progress in Equity Award for the NETWORKS program; and three Gala Awards at the American College Dance Festival. Award-winning professors at CCCCD include a U.S. Professor of the Year, four Minnie Stevens Piper Award winners, and two Fullbright Scholars. Also among the CCCCD faculty is an honoree for the Teaching Excellence Award, presented by the Texas Mathematical Association of Two year Colleges.

Another recent development gives CCCCD an expanded role in offering state-of-the-art technology training. On March 5, 2003, Microsoft Corporation announced that Collin County Community College District and Richland College, part of the Dallas County Community College District, will partner to serve as the Texas Working Connections IT Faculty Development Institute, one of 10 sites across the United States in 2003 to offer cutting-edge IT training for community college faculty and staff.

CCCCD has had a records program with departmental retention schedules since 1994, with each department originally responsible for managing its own records. The college used a manual system for managing records prior to November 2001, when a new 2,500 sq. ft. records center was opened to meet needs consistent with expanding programs and growing enrollment at the institution.

To assist in managing records at the new facility, CCCCD selected and implemented the Intersect Systems Retention Schedule Manager (RSM) and Records Control and Management System (RCAMS) for use at the records center. Ms. Peggy Browning, Manager, CCCCD Student Records System, placed initial inventory in the records center at over 6,000 containers, which were transferred to the new facility from the previous location at the Spring Creek campus. Ms. Browning notes that the total number of containers at the records facility has been reduced to less than 4,000 as a result of fully implementing the Intersect software and keeping current on retention requirements in managing the records database.

The staff at the new CCCCD records



Peggy Browning at RCAMS station

center includes Ms. Browning, and two records specialists, Tammy Brown and Rhonda Bolton. Tammy is employed at the records center full time, and Rhonda is employed half time.

Ms. Browning has an Associate Arts degree from Collin County and a BS Degree from Texas Women's University, and has been involved in records management for over ten years. She is enrolled in the CRM program, with one test to go for full certification.

Ms. Browning taught a course in records management at the college for several years, although due to her expanded responsibilities she had to give up teaching the course last year. Intersect Systems provided copies of the Intersect records management software for use by enrolled students during the period that Ms. Browning taught the course – an arrangement that Intersect is happy to make available to other interested two- and four year institutions that teach courses in records management.

CCCCD will be one of the early Intersect users to implement the new Accession work flow module for use by selected departments for viewing their records on-line, and transmitting requests directly to the records center via the LAN system.

The records center also is engaged in imaging some categories of documents. Student transcripts, grade rosters, class lists, and TASP documentation are scanned to optical disk. Once scanned, the documents are available for viewing at all campuses.

Records professionals can contact Ms. Browning at the CCCCD Records Center at the Central Park campus in McKinney at (972) 548-6568.

(Image of Central Park Campus courtesy of CCCCD.)



Focus on:

City of Plano, Texas

The city of Plano, Texas is located 20 miles north of downtown Dallas. The largest city in Collin County with a population of over 237,000, Plano is the home for leading information technology companies Electronic Data Systems and Perot Systems. Plano is also the U.S headquarters location for Swedish wireless telecom and equipment manufacturer Ericsson, and for Nortel Networks, the Canadian maker of telecom switching, wireless, and optical systems. In 1996, Plano was named the "Best City in the U.S. for Home-based Businesses" by Home Office Computing thanks to a strong telecommunications infrastructure and a dedication to small business development. Plano was named a



City of Plano City Hall

Users of Intersect Systems retention schedule development and records management software can publish records control schedules and sub-schedules, as well as all or part of their records database, on the Internet or on a private intranet. Contact Intersect Systems Inc. at (972) 641-7747 for more information on this feature of Intersect software.

1994 All-America City by the National Civic League and Allstate Foundation. The city was named the 8th Safest City in the United States based on the most recent F.B.I. crime statistics, and is in Money magazine's listing of "America's Safest Places."

The city of Plano has a history of strong emphasis on records management. Beginning in 1987, the city developed a custom records database software system to meet its needs. The system operated on a mini-computer installed at the city hall, and was used to manage paper and microfilm records for the ensuing fourteen years. In fact, the city's original records database development pre-dated much of the work done by the Texas State Library and Archives to develop the Texas Retention Schedules for state and local governments. Several subsequent updates were made to the original mini-computer database system as the state schedules were finalized and as appropriate state guidelines and procedures were put in place, and also to add a section to manage imaged records on microfilm.

When the first retention schedules could be submitted to the Texas State Library and Archives for approval, Plano already had its schedules ready and was one of the first to submit, resulting in an Award of Merit by the library to Plano in 1987.

When plans to phase out the aging mini-computer system were being made in 2001, the city began looking for replacement software that would run on the Windows® operating system, and that could be installed on the city's Local Area Network and shared among various users.

The city selected Intersect's Retention Schedule Manager (RSM) and Records Control and Management System (RCAMS) software. Intersect installed the RSM and RCAMS software in the Spring of 2002, and converted the city's records data to the Intersect records format. After a brief period for system testing and for on-site training, the city switched over to the new Intersect records management software system.

After the Intersect software was initially installed, the city used the retention software to create the retention control schedule for the city, and then to create individual departmental schedules for each of forty-three city divisions from the master control schedule. The retention



Billie Clayton, Records/Public Information Manager

control schedule is automatically accessed by the RCAMS records database when processing containers to determine retention requirements. The RCAMS database system is used for management of the records inventory, including locating and checking records in and out, for entering new records into the database, and for records disposal processing including printing of disposal sign-off forms for each department when retention requirements have been met.

The city of Plano has taken advantage of a recently added feature of the Intersect software: in addition to printing hard copies, the Retention Schedule Manager supports point-and-click export of the retention control schedule and of departmental schedules created with the software. Once exported, the schedules can be easily converted to Internet-compatible files with any recent version

(Continued on Page 4)



Sylvia Berry at computer running RCAMS

Intersect Systems Inc.

P. O. Box 540907
Grand Prairie, Texas 75054-0907



Phone: (972) 641-7747
Toll Free (888) 745-4151
Fax: (972) 641-0792
e-mail: newintel@newintel.com
Internet: www.intersectsystems.com

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

Copyright © 2003 Intersect Systems Inc.

Intersect Systems Inc. has a number of on-going software development projects, as well as a continuing series of updates and enhancements to existing software applications. For more information on Intersect Systems Inc. software for Retention Schedule Development and Management, for Records Control and Management, to discuss your software requirements, or to discuss current software development and software enhancements, contact Intersect Systems at the address, telephone number, or e-mail address listed above.

Intersect Systems Inc. is a Qualified Information Systems Vendor (QISV) in the state of Texas, specializing in software for records retention and for records database management. For more information, contact Intersect Systems Inc. or visit Intersect's web site at www.intersectsystems.com.

About Intersect Systems ...

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. The Intersect Systems design and development team includes top-notch software professionals and consultants, as well as experienced records management professionals.

Intersect Systems Inc. continues to develop and introduce software systems for professional records managers that combine innovative ideas with proven, effective, and user-friendly approaches that produce results in the critical area of retention schedule development and maintenance, and in records management operations.

Records Consulting Services

Is your organization planning to expand or upgrade your records management program, or designing or expanding a records storage facility? Do you need assistance in creating a local Records Control Schedule, or in developing a records management policy for your organization? Mr. Joe Harry of Texas Records Consultants provides experienced consultation and assistance in these and related areas of records management to local governments and businesses in North Texas. Mr. Harry can be contacted at (817) 996-9281.

Local governments and businesses that have failed to establish and maintain credible records management programs can find that they are at a serious disadvantage in a lawsuit. The inability to produce documents during the discovery process, and the inability to explain the circumstances and authority under which documents were destroyed, can have serious consequences in a lawsuit. Judges have been known to enter default judgments against defendants due to faulty records management practices.

Focus on City of Plano ... (cont.)

(Continued from page 3)

of Microsoft® Office, and published on-line for Internet or private intranet access.

The city added the departmental retention schedules to the Records Management section of the city's private intranet site, allowing each city department to easily view and search its retention schedule on-line, eliminating the need to distribute paper copies (see illustration).

The intranet resource will also make any future schedule updates immediately available on-line, without the need to distribute printed copies. The organization and format of the departmental schedules on the intranet site are well designed and user-friendly. (The schedules are not available for public viewing through the city's Internet site.) Adding the exported department schedules was straightforward, requiring a few minutes each to copy and format each department schedule. The estimated total time to add and publish all of the departmental schedules on the intranet site was less than eight hours. The software used to maintain the intranet records management site is Microsoft Front Page®.

The city's records database averages

around 7,000 containers, most of which are located in a central warehouse facility and in a records annex. This total is somewhat smaller than typical records databases for cities of similar size -- made possible by the city's diligent observance of the state's retention requirements, and by disposal of records when the retention requirements are met.

Many of the city's permanent records are transferred to microfilm, allowing the city to apply to the state for approval to dispose of the hard copy originals, further reducing space requirements. In addition, some electronic imaging is done on a departmental basis; in fact, the Plano police department was one of the first to use electronic imaging beginning in the late 1980's.

The city currently uses a vault, which has its own humidifier and air conditioning system, for microfilm and for historical and vital records.

The long-term success of the city of Plano's records management program is attributed to the experienced and dedicated staff, and to the fact that city officials and departments throughout the city have been very supportive of the program.

The city of Plano's Records Management Division is happy to share its experience in managing their records facility with other records professionals. Visitors are asked to call in advance to arrange a mutually suitable time for a visit. Please contact Ms. Billie Clayton, Records / Public Information Manager, at (972) 941-7222 for more information.

(Images courtesy of city of Plano)

Records Management	
HOME	
List of Retention Schedules by Department	
Accounting	Library Administration
Animal Shelter	Municipal Court Administration
Budget and Research	Municipal Court Judge
Building Inspections	Parks and Recreation Administration
City Manager	Planning
City Secretary	Plano Television Network
Civic Center	Police
Customer and Utility Services	Print Shop
Development Business Center	Property Standards
Engineering	Public Information
Environmental Health	Public Safety Communications
Equipment Services	Purchasing
Facilities Services Administration	Records Management
Finance	Risk Management
Fire	Solid Waste
Fire Marshal	Streets
Human Resources	Telecommunications
Information Services	Utility Maintenance Administration
Internal Audit	Warehouse Operations
Legal	

City of Plano intranet web page with links to departmental schedules