



# The Intersection

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

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### 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 reten-

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."

tion requirements change. 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.