

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

Vol. 10 Fall 2004

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McLennan County Archives
Waco, Texas



Texas A & M University
at College Station

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New Software: Intersect Delivering Global Editor

Intersect's new Global Editor provides expanded editing and database management capabilities for the *Records Control and Management System (RCAMS)*.

The Global Editor allows selection of categories of container records, with the options of global edits to selected fields in the selected container group, or of step-through changes to multiple fields for specific containers in the selected group using a unique *Edit Mask* function.



Global Editor requires the user to make two levels of backups before proceeding. First, a backup of the records file is made, and then an Edit Copy or working copy is created.

Some examples of using the Global Editor:

1. You need to revise the retention periods for a selected category of records. With the Global Editor, you can use a query to select the containers to be changed, and then make the changes for all of the selected containers in one operation.
2. An organization renames one or more departments. The records container database needs to be edited to reflect the department name changes. With the Global Editor, the records manager can select all entries for the affected department using the RCAMS Query function, and then change the title in all entries in a single operation. Similar edits can be made for most fields. For instance, if retention periods for a records category need to be revised, all affected containers in the records category can

be selected and revised in one pass.

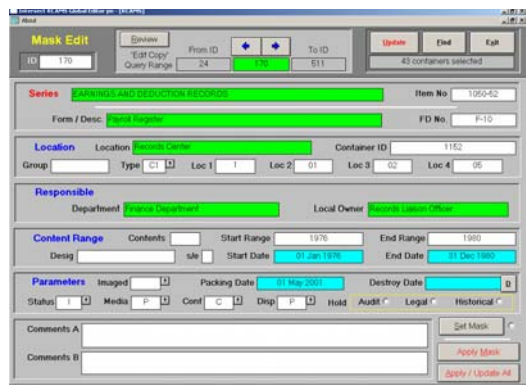
3. Selected container entries for a particular category need to be edited. With the step-through *Mask Edit* function, initial selection, container-by-container review, and point-and-click application of the edit mask make such selective updates quick and convenient.

Changing hundreds or even thousands of container records in one operation, and making such changes in multiple steps, raises the possibility of an error by the user.

Two levels of safeguards are provided. If the user discovers that a wrong field was selected and changed, or a wrong value was entered, the changes can be undone in two ways:

1. Global Editor requires that a backup copy of the master data file be created at the start of an editing session. Then a second Edit Copy is created, to which the actual changes are made. When the changes are complete, the Edit Copy can be checked and made the live copy. If an error is noted, the edit can be cancelled and the original file restored.

2. If the Edit Copy has already been made the live copy before an error is discovered, a second option allows the user to restore the master data file copy initially created. This can be done at any time prior to another edit session.



The Mask Editor allows the user to apply changes to multiple fields at one time. In addition, in instances where only selected records in a list need to be changed, the Edit Mask can be applied selectively in a step-through mode.



Focus on: McLennan County Archives Waco, Texas

McLennan County lies in central Texas, south of Dallas / Fort Worth, and north of the Temple / Killeen / Fort Hood area. The City of Waco is the county seat.

Manufacturing, agriculture, and education are the leading industries in the county. Perhaps best known for Baylor University, originally chartered by the Republic of Texas in 1845, the Texas State Technological College and McLennan Community College are also located in Waco.

The area has been in the national and international news frequently in the past few years due to the location of President Bush's ranch near Crawford, in the eastern part of the county.

Kathleen Schwartz, CRM, is the Records Management Officer for McLennan County, and in fact was the first records manager for the county, having established the program. Schwartz is something of a pioneer, as she was previously the first records manager for the City of Waco, also establishing their records program.

Kathy Schwartz is a long-term user of Intersect software. She acquired the Retention Schedule Manager program while managing the City of Waco's records program, and subsequently acquired the program for McLennan County. More recently, she licensed the RCAMS records database as well for use in the McLennan County Archives.

The McLennan County Archives are in a three-story building in downtown Waco. The records program manages approximately 16,000 containers and over 3,000

books of historical significance, including, for instance, the original oaths of office when the county was first incorporated in 1850. Other historical documents go back even further, and include the day books for the Circuit Judges, or circuit riders, who traveled the area before the county was established.

Many of these historical documents are being encapsulated in plastic through a process that evacuates the air and then seals the plastic around each page, to help preserve them against further deterioration due to humidity changes.

The county also films documents on microfilm, or on microfiche, as appropriate, based on the type of record and the retention requirements.

The county handles archival records as well as inactive records. The distinction is important, because historical or archival records are handled somewhat differently.

The Archives uses Intersect's RCAMS records database system for both archival documents and for inactive records. When asked about the Archives' use of RCAMS, Schwartz commented, "We love RCAMS. It is the only program we've found with the flexibility to handle both archival records and inactive records in one system."

McLennan County was also an early user of Intersect's new Global Editor, which operates with RCAMS to allow the user to select groups of container records, and then to change specific fields in all of the selected records in one operation. Claire McDaniels, primarily responsible for the RCAMS database, provided valuable insights and suggestions based on her experience with the system. Schwartz noted that a benefit of the Global Editor was to edit various entries in the records database, to correct variations in names and labels to make them uniform, and to make changes based on revised naming conventions.

The McLennan County Archives welcomes visitors. Anyone interested should contact Kathy Schwartz at (254) 757-0860 to arrange a mutually suitable time for a visit.



A process of encapsulation, which encloses pages in a special protective plastic, is used to preserve many of the County's historical records.



Lenora Hammons is responsible for microfiche and microfilming operations.



A vigilant Mikey the cat, on watch for mice and other creatures that might make a meal out of paper documents. Mikey is one of three feline residents of the County Archives.



Trudy McGuire points to one of over 3,000 books in the Archives' historical area. Many of these volumes date back to the mid- to late 1800's, and many of the earliest ones are being protected with a special process for encapsulation of the pages.



Kathy Schwartz, McLennan County Records Management Officer, at keyboard of computer station running Intersect's RCAMS records management system.



Focus on: Texas A & M University Records Center College Station, Texas

Texas A & M University, established in 1876, was the state of Texas' first institution of higher education. Established under the Morrill Act of 1862 as a land grant college, the University today bills itself as "a land-grant, sea-grant, and space-grant institution."

Located in College Station, Texas, the school's curriculum today includes not only agriculture and engineering, but also architecture, business, education, geosciences, liberal arts, medicine, science, and veterinary medicine. Enrollment today in the ten colleges includes approximately 50,000 students.

The records management department is housed at the Sterling C. Evans Library on the College Station campus, and is a long-term user of Intersect Systems' Retention Schedule Manager (RSM) and Records Control and Management System (RCAMS) records database system. Now in their fifth year with the Intersect software, the records management department uses the Retention Schedule Manager to create and maintain their records control schedule. The RCAMS records database is used to maintain the University's container inventory. The RCAMS records database communicates with the RSM program, insuring that current records retention information is used for each records container and record type that is entered into the system.

On a recent visit to College Station to install software updates at the University records center, Intersect had a chance to visit with Meg Carpenter, Records Officer, and to make some photos of this



High volume shredder in records center.

unique records facility.

Most records centers seem to be located in warehouse facilities, in basements, or in secure windowless storage rooms. The A & M records center, however, is located on the top floor of the recently-constructed annex to the Sterling C. Evans Library, in the heart of the University campus. The views are spectacular. To the West, one can see the new George H. W. Bush Presidential Library, and beyond, the University airport. Looking East, one can see across College Station, and identify highway 6 on the East side of the city, connecting Houston and Waco.

Meg Carpenter gave us a tour of the well-organized facilities, and provided an overview of their operations.

We asked how Intersect's RCAMS records database fits into the operations, and Meg's response was direct and to-the-point: "I don't see how we could get along without it." She noted specifically the Search and Query capabilities, and remarked "... (with RCAMS) we can find records when we need them." Other features of RCAMS she mentioned included the data entry capabilities with the ability to use any existing container as a template to reduce keyboarding, and the convenient multiple-container entry function.

The records center staff includes four students at the University, who work part-time at the center filling records requests and re-filing containers.

The students are trained in the operation of the RCAMS software. There is no particular preference as to student employees' course of study; the current students' studies include wildlife and fish-



Meg Carpenter at keyboard with Intersect's Records Control and Management System (RCAMS) running on computer station.

eries, chemistry, and accounting. Carpenter noted that business and accounting students in particular gain valuable first-hand experience in records management in understanding and working with records retention schedules, and operating a live records management system, that will be useful in their careers.

Carpenter has been accepted to sit for the CRM exam early this Fall.

The Records Center welcomes visitors to the facility. Anyone interested in visiting is requested to telephone first, to arrange a mutually suitable time. Meg Carpenter can be reached at (979) 458-1473, or by e-mail at mhcarpenter@tamu.edu.



First row of container storage in the records center.



Spectacular view looking East from the records center on the top floor of the Sterling C. Evans Library. In the background is the University Administration Building.



Student staff at Texas A & M records center: from left, Stephen Ross; Linsey Shinpaugh; Will Barrett; Daisy Tran.

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Intersect Systems Inc. has a number of ongoing software development projects, as well as a continuing series of updates and enhancements to existing software applications. For more information on Intersect software for Retention Schedule Development and Management, software 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 an Information Systems Vendor (CISV) 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 develops software applications for both local governments and state agencies to help meet state requirements in maintaining records programs. Intersect also offers specialized software tools for commercial businesses, including *Clark's Encyclopedia of Records Retention*, and commercial versions of its Retention Schedule Manager and Records Control and Management System database. Intersect software applications combine innovative ideas with proven, effective, and user-friendly approaches that produce results in the critical area of records management.

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? Are you evaluating imaging systems?

Mr. Joe Harry offers consultation and assistance in these and related areas of records management to local governments and businesses in North Texas. With over ten years of experience in the field, Mr. Harry can help you with your records management program. References available on request.

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.

Installation and Training

Spring and summer of 2004 have been particularly busy for Intersect. New software installations, data conversions, on-site training of new users, software updates, and re-training of existing users to address staff additions or changes, have made for a hectic few months.

In addition, the pace of new software development and announcements has been intense, with the introduction of the Image Management system, the Global Editor, and the Accession and Accession Monitor systems.

New installations have included the Denton County records center, and training of the records management staff in Denton. Training was conducted in two sessions for the eight participants in the County's training center — a very well-equipped facility with computer stations for each participant, an overhead video projector, and an instructor's console — all networked.

Another new installation is in the Northwest Independent School District, in Justin (north of Fort

Worth) — a rapidly growing district with fourteen schools and over 6,000 students.

An additional new installation for Wichita County (Wichita Falls) is underway as this is written.

An extensive cooperative project with the Tarrant County records center continues, with a focus on extending concepts on which the Accession system is based.

In addition, a number of new development projects promise that the pace of activity will remain at the current level through early 2005.



Denton County participants in one of two training sessions. From left: Theresa Rogers, Records Management Officer; Cecilia Cook; Teresa York; and David Mollen.

A preview of current projects includes *RCAMS / Enterprise*, for users with 100,000 or more containers, with options for Microsoft SQL Server or the open source MySQL database; *RCAMS Mail*, an addition to the new Accession system to support LAN-based mail between departments with Accession installed and the records center; and an extended bar code system for RCAMS that will allow container placement on a space-available basis, with the locations and container ID's then input to RCAMS with a portable wand via a USB port. The bar code system will also provide a container inventory / reconciliation function to insure that the records inventory and RCAMS space matrix are synchronized. We encourage Intersect customers with an interest in any of these, or with related suggestions, to call us for more information.

Users of Intersect Systems retention schedule development and records management software can publish records control 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.