

HP customer case study: Forsyth County Schools manages growth, achieves compliance with HP TRIM software

Industry: Education

Forsyth County Schools

Growth spurs need for award-winning HP TRIM solution



"In Forsyth County, we believe that change creates opportunity. The need for process efficiency in a time of fast growth gave us the opportunity to deploy HP TRIM for our records management program. This helps us redirect resources to our primary mission of improving student achievement."

—Sue Derison, Director, Information Systems and Support, Forsyth County Schools, Ga.

Objective:

Digitize records to support school system efficiency and long-term regulatory compliance as student population grows

Approach:

Deploy HP TRIM document management solution

IT improvements:

- Unify 100,000+ student files as well as HR, financial and food service records
- Provide instant online access
- Reduce paper use 75 percent, free file room space
- Implement DoD 5015.2 design standard

Business outcomes:

- Accommodate growth of student population
- Ease and secure access to records
- Streamline and improve document lifecycle management
- Satisfy regulatory compliance demands

In recent years, Georgia's Forsyth County has been one of the fastest growing counties in the United States. Its student population from 2005 to 2010 is expected to rise 52 percent. While registration had been centralized, student records were not due to limited space. What's more, government accountability and regulatory compliance demands were increasing. In response, the Forsyth County Schools Board of Education and Cabinet approved creation of a centralized registration and records center. That center needed an electronic records management application to archive and retrieve both electronic and paper files. The solution was HP TRIM software.

"We needed to digitize records to maintain performance and long-term compliance as the county student population grew," says Sue Derison, Forsyth County's Director of Information Systems and Support.

Dispersed records, a call to standardize

A major challenge was that student and administrative records were located throughout many departments within the school system, either in a local school district or on a single school campus. Rising student populations increased the amount of information to manage. With decentralized record sites already at capacity and multiple employees involved in the creation, management and tracking of critical information, it had become difficult to standardize the records policy to comply with a multitude of local, state, and Federal guidelines.

To solve these problems, the school system initiated meetings with stakeholders to create the Records Center Project Plan. The project team sought input from other school systems with electronic records management programs in Georgia's Fayette County

Customer solution at a glance

Primary applications

Student, HR, financial, food service and building maintenance records

Primary software

- HP TRIM software

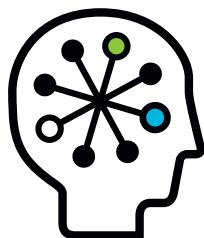
and Fairfax County in Virginia. They also had an excellent resource in Andrew Taylor, Assistant Director, Georgia Archives and author of Guide to Managing Public Records in Georgia.

"Authorized staff can now satisfy requests from college and university registrars, and former students, with immediate electronic access to records. There is no more searching multiple file rooms and making return phone calls."

Sue Derison, Director, Information Systems and Support, Forsyth County Schools, Ga.

The next step was to identify resources needed in the form of hardware, software and space remodeling. This process also included a complete review of the current policies and procedures, and the legal issues and compliance requirements the county needed to address: Family Educational Records Protection Act (FERPA), Individuals with Disabilities Education Act (IDEA), Georgia Records Act and Open Records requests to determine retention schedules. To ensure accountability and regulatory compliance, Georgia has adopted DoD 5015.2 as a design standard to provide information accuracy, strict version control and full audit capability with a strong emphasis on security of sensitive data.

The school system chose HP TRIM as its document and records management solution because the software is a single, unified commercial off-the-shelf product certified under DoD 5015.2-STD. The solution was deployed in one week and the first group of users was trained the second week. Scanning started immediately to begin the conversion from paper files to electronic records with secure online access. To date, more than 100,000 current and former student files—roughly two thirds of the total—have been scanned and merged to create a single repository. Duplicate paper records in the area of special education were able to be eliminated as authorized users can now access the single electronic copy.



The system was also configured to manage files for human resources and the financial department. The schools' food services organization followed so they could import reports directly into the system. Forsyth County Schools' most recent project is to use HP TRIM software to view facility documents needed for building maintenance. The deployment continues expanding to include electronic documents such as email, Microsoft® Office Word, and Excel® files for a range of departments across the enterprise. HP TRIM offers the flexibility to configure the solution to meet the unique records requirements of each department.

A secure, scalable, efficient system

Progress continues as more student documents—scanned and electronic—join the 100,000+ records already in the HP TRIM repository. The system has fundamentally changed the way staff operates on a daily basis to access student files, as well as HR, financial, and food service records. Access is securely controlled and audit trails identify who has accessed files. Records retention policies were set and are strictly enforced. Another significant solution benefit was the schools' ability to reduce the paper stored in file cabinets after purging 75 percent of all files. This enabled them to eliminate file rooms and free that space for other purposes. Misfiled and lost folders are a thing of the past; each scanned file drawer was posted with a sign reading "DO NOT OPEN THIS DRAWER, LOOK IN HP TRIM."

"Authorized staff can now satisfy requests from college and university registrars, and former students, with immediate electronic access to records," Derison says. "There is no more searching multiple file rooms and making return phone calls."

As a result of all this, Forsyth County Schools won an award for Excellence in Archival Program Development from the Georgia Historical Records Advisory Board. By publicly recognizing excellent achievements, the Board strives to inspire others.

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