

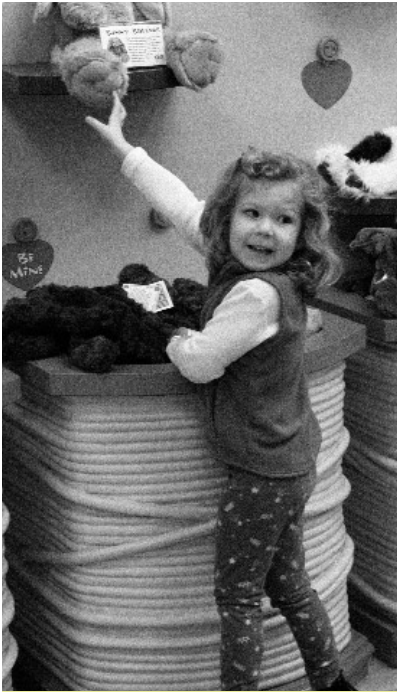
Tracy Unified School District, California

# Document management solution earns high marks



# “Compaq’s huge base of experience with Microsoft products and network operating systems provides an invaluable technical resource.”

*Kerry Johnson, Director of Information Services and Educational Technology, Tracy Unified School District, California*



## *Business results:*

- > **Improved information access** – teachers and other staff have reliable, secure access to documents and district information, from anywhere, at any time.
- > **Increased productivity** – eliminating the need to search through myriad file shares, not to mention more than 60,000 hard copy legacy documents.
- > **Improved collaboration and communications** – the customized SharePoint Server solution provides an efficient, consistent method for document versioning and information dissemination.
- > **Greater time savings** – a single, standard interface to document and information access enables IT to spend less time on file share backup and more time focused on enhancing the single, centralized solution.

Located in the San Joaquin Valley of California, the Tracy Unified School District (TUSD) is experiencing a time of rapid growth and change: The student population is growing rapidly, with an average of nearly 800 new students enrolling in K-12 classes each year. New schools are opening, and district offices are moving to new quarters.

At the same time, TUSD is aggressively pursuing the use of new technologies to support student learning in the most effective ways possible — and to provide robust network services to its teachers and staff to allow for increased productivity and efficiency.

“We eagerly embrace new technologies at TUSD,” said Kerry Johnson, director of the Information Services and Educational Technology (ISET) department for the school district. “I’m proud to say that 99.9 percent of our classrooms are wired and connected to the Internet, and 75 percent of our teachers do student attendance on networked computers. One of the most recent challenges we’ve

faced was finding the right technology to support better collaboration among groups of teachers, administrators and the families whose educational needs we serve.”

To address this issue, TUSD engaged Compaq Global Services to implement a customer document management solution built with Microsoft SharePoint Portal Server.

## The “old school” of document management

The TUSD ISET department is responsible for more than 60 Compaq ProLiant™ servers spread across 20 sites. These servers support a wide variety of district functions — from basic file and print services to tracking school schedules, and meeting ever-increasing state and federal requirements.

While the ISET staff was managing the server systems themselves, the content of the file shares was completely unmanaged. As a result, users had difficulty finding information and often had to search among multiple copies of documents with the same file name but different content. Significant time was spent browsing

through multiple domains and servers to find the correct file share.

For the district’s Human Resources (HR) department, this problem was compounded by the fact that, in addition to electronic file share content, the HR staff had 80 years’ worth of legacy documents to contend with — or figured another way, approximately 60,000 hard-copy employee records stored in office file cabinets. So TUSD was looking for a scalable digital storage system that would facilitate easy searching and retrieval.

At the same time, finding a solution that would allow hundreds of staff members to access documents from home computer systems was a never-ending challenge. “We considered connections via virtual private networks,” commented Sara Windsor, senior network engineer with TUSD. “But with most staff connecting from home PCs, we would have faced significant security and configuration challenges. So we really needed a more flexible yet secure access solution.”

### One new solution meets many goals

“We had a long list of very specific goals in mind for our new document management system,” said Johnson. “We wanted to replace all file shares with folders and transfer the file share content to a new system. We wanted to implement a document access control system that would allow folder owners to determine who has access to content within folders. And we wanted the document management system to be accessible from a Web browser. We also were looking to extend the solution to users outside the firewall so authorized users could access documents from anywhere, at any time.”

TUSD is working closely with Compaq Global Services to deploy a customized intranet portal solution based on Microsoft SharePoint Portal Server that meets all of these goals.

Piloted with more than 1,200 users, and scalable enough to quickly provide services for up to 14,000 users, the custom SharePoint Portal solution provides seamless, secure access to documents

and critical information via a common interface through both intranet and extranet connections.

The solution includes document searching and retrieval, document versioning, check-in, check-out and subscription capabilities. In addition, Compaq customized a digital dashboard interface to enable easy integration with other district information sources, such as the existing student information system.

Compaq Global Services is also helping the TUSD HR department to determine the best way to organize the volumes of hard-copy employee records that are to be scanned into the SharePoint Portal Server system to produce imaged documents. “We’re working closely with a Compaq information designer to create the structure of HR’s document library — to streamline the process and add approval and routing capabilities to handle the electronic version of the documents,” explained Windsor.

### Benefits add up

Already, TUSD is beginning to realize the benefits that come with improved information access and document sharing.

Providing staff “anytime, anywhere” access to documents via a single, standardized interface translates into increased productivity and efficiency — not to mention happy staffers.

“The customized SharePoint Portal Server solution is saving us time in several different ways,” said Windsor. “We no longer need to support multiple file shares, which allows us to concentrate on the development of a single, centralized solution. This also eliminates the need to provide backup and support for many remote file shares across a wide area network — and that means we’re saving on network bandwidth as well.”

“Thanks to the appropriately scaled Compaq hardware that powers the SharePoint solution, we can also now implement a higher level of fault tolerance, as well as a more secure backup system, for greater reliability and availability.”

### Compaq expertise speeds solution

TUSD has a long-standing relationship with Compaq, and first worked with Compaq Global Services to provide an analysis of existing networks in preparation for the recent upgrade to Windows 2000.

“It was a natural progression of our relationship to have Compaq Global Services help evaluate how the Microsoft SharePoint Portal Server solution might meet our information access and document management needs,” said Windsor.

“In the past, we have used relatively little consultant support in implementing new solutions. We saw this project as one that required expert advice and support in order to be successful,” observed Johnson. “Compaq provided us with needed SharePoint expertise and was able to customize Web parts to meet our specific requirements.

Added Windsor, “The Compaq engineers were always extremely responsive to our many technical questions, many related to the configuration of our portal for secure access from both intranet and extranet.”

### What's next for TUSD?

Phase one of the SharePoint implementation focuses on document management, and will be followed by a second phase that calls for the evolution of the SharePoint installation into a dynamic information portal solution.

"This next phase will include not only the implementation of a host of forms, and document tracking and approval processes," said Windsor. "It will also include custom applications designed to present key student data, such as daily attendance figures and enrollment numbers, to staff and administrators dynamically."

TUSD will continue to customize the portal solution. "We plan to eventually offer

specific dashboards designed with an eye to the needs of specific user groups," explained Johnson. "For example, principals might get a dashboard that includes Web parts which present information relevant to their specific school as well as site administrative announcements. And school board members might get a dashboard that includes Web parts which present summary data for the entire district, along with subscriptions to board meeting agendas and links to support documents. We're excited about the possibilities and will continue to rely on Compaq Global Services to help make them real."

### What makes it work:

- > **Systems:** One Compaq *ProLiant* 8000 server
- > **Software:** Microsoft SharePoint Portal Server application and Windows 2000 Advanced Server operating system
- > **Solutions:** Document Management Solution and Compaq Publishing and Intranet Portal Solution
- > **Services:** Compaq Global Services to help plan, design, customize and implement the SharePoint Portal Server solution

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