Oregon Records Management Solution

Public / Private Partnership:
Oregon Secretary of State, Archives Division
Chaves Consulting, Inc. / Arikkan, Inc.
The Problem

- Too much stuff to manage manually
- Too many silos
- Inefficient work processes
- Security difficult to enforce
- Retention rules ignored
- Massive legal liability
The Solution

- Centralize control of information
- Eliminate unnecessary duplication
- Streamline work processes
- Simplify routine tasks
- Automate security & retention
- Lessen load on employees
Oregon Records Management Solution
One Team. One Purpose.

OREGON STATE ARCHIVES
- Records & Information Management
  - Customized retention & security
  - Software configuration / set-up
  - Initial training

CHAVES CONSULTING, INC.
- Business & Customer Support
  - Single point of contact before, during and after implementation
  - 360 degree Support Desk
  - Project Management

ARIKKAN
- Technical Support
  - Technical implementation
  - Network engineering
  - Ongoing application maintenance

ORMS Project Manager: Karen Kolb-Schoeningh
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Benefits of Oregon’s Partnership with CCI/Arikkan

“Solution as a Service” (SaaS) Model

Value to Agencies
- Eliminates up-front expenses for hardware, software, maintenance, technical and end user support
- Low per user per month fee includes comprehensive subscription services
- State Contract: No RFPs required

Tested & Proven Implementations
- Over 50 implementations: state and local government, special districts, K-12

360 Degree Support
- ORMS Support Desk available by phone or email
- Provides user and technical support
- Coordinates all support resources forever

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Customized Implementation Strategy

We (Archives, Chaves, Arikkan):
Work with you to design your customized step-by-step approach to fulfill your business needs and priorities.

Our implementation goals:
To implement using the most supportive and least disruptive process possible.

Our Implementation Team’s intention:
To make improvements in how your work is accomplished, not to add an additional burden.
HPERM HIGHLIGHTS

ORGANIZE:
- Archives works with you to:
  - Create folder structures with attached security, retention, disposition rules

FIND/SEARCH:
- Flexible, robust search filters:
  - Find information how you want to
- Save and share searches

SHARE:
- Collaboration and Version Control:
  - Edit and finalize documents in the system with full accountability
SECURITY
- Compliance with DoD Certification 5015.2
  - Required by OAR 166
- Customized security settings per agency needs
  - Assign access and permissions through security groups
- Audit trails recorded automatically:
  - Accountability through permanent record of actions

RETENTION AND DISPOSITION
- Ensure compliance with Oregon law
  - Schedules built in by Archives team
  - Legal holds applied in system
ORMS Solution Includes

- HPERM software licenses and upgrades
- Detailed implementation planning
- Customized agency implementation
  - IT configuration
  - Custom file structure and software build
  - One-on-one training for all full users
- Access to ORMS 360° Support Desk
- Storage infrastructure, maintenance, upgrades and support at Synergy Data Center
- Batch migration and import of old records & metadata
Optional “Non-Subscription Services”

Available upon request:

- **Facilitated Business Process Sessions:**
  - Assistance with leaning out processes and increasing efficiency
  - No charge for first “Happy Path” process session for first ORMS business procedure

- **Custom built workflows in HPERM**
  - Requires business process configuration and testing prior to designing the flow with the tool
  - Requires Workflow software design expertise

- **Direct software integrations or anything requiring custom programming work**
ORMS Pricing Structure

- **Base:** $370.20/month includes:
  - 10 licensed users
  - 100 GB data storage
  - 10 GB data transfer per month

- **Additional users:**
  - **$37.02** per **full license** user per month
    - Includes 10 GB storage / 1 GB transfer/month
  - **$18.51** per **inquiry only** user per month
    - Search and view access only, no storage included
ORMS Pricing Structure

- Prices **will not** increase, drops as total ORMS users increase
- Additional Storage/Transfer:
  - $7.00 per 10GB/month
  - $1.20 per 1GB transfer per month
- 300 or more users: discount on pricing
  - $24.06 per user
- CJIS compliant implementations also available for additional $250/month (up to 25 users)