



*Oregon Records  
Management Solution*

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

# *The Problem*

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

# *The Solution*

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- 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.*

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## **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

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# *Benefits of Oregon's Partnership with CCI/Arikkan*

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## “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
- Lessons learned: What worked? What didn't? Factors for Success?

### 360 Degree Support

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

# *Customized Implementation Strategy*

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## **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*

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## **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

# *HPERM HIGHLIGHTS*

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## **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***

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- 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”*

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*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***

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- 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***

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- 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)