Oregon Records Management Solution

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

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

"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 90 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

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

CONTENT MANAGER 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

CONTENT MANAGER HIGHLIGHTS

SECURITY

- **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

- Content Manager software licenses and upgrades

- Detailed implementation planning

- Customized agency implementation
  - IT configuration
  - Custom file structure and software build
  - Training resources are provided to 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:

- **Scanning services**
  - Image quality control
  - Metadata input

- **Custom built workflows in Content Manager**

  - 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

- 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)