Case study

State of Oregon embraces HP TRIM software for statewide cloud-based records management

HP Autonomy customer case study
Read how the State of Oregon uses HP TRIM in the cloud-based Oregon Records Management Solution (ORMS) to minimize information overload, legal risk, and liability.

Customer
State of Oregon

Industry
State government

“We realized that the benefits we experienced at the Secretary of State’s office could be broadened to encompass every city, county and state agency in Oregon, and since agencies access ORMS on a per-user basis, the smallest agencies can have the same transformative public records management as organizations with thousands of employees and larger budgets. ORMS with HP TRIM truly levels the playing field when it comes to managing public records.”

—Kate Brown, Oregon Secretary of State

Objective

Leverage technology to enable transparent, efficient records management with lowered risk and costs for all public entities throughout the State of Oregon. Implement Solution as a Service, enabling rapid deployment and use at an affordable cost.
Approach

Implement HP TRIM in the cloud as part of a Solution as a Service deployment to make access to government records easier, more transparent, and affordable.

Implementation highlights

• A public-private partnership and the first statewide, private government cloud electronic records management solution of its kind in the country
• Fulfilled the agency’s needs for records management hardware, software, training, and support without the requirement of an up-front investment
• Enabled city, county, and state agencies using ORMS with HP TRIM to manage more than one million documents during the pilot
• Moved files from disparate storage approaches including software programs, microfilm/microfiche, and paper into the HP TRIM electronic records management solution

Business benefits

• A public-private partnership and the first statewide, private government cloud electronic records management solution of its kind in the country
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Overview

The Oregon Secretary of State’s office pursues a vision that includes using innovation to connect Oregonians to their government, and to deliver services effectively, efficiently, and with greater transparency. In keeping with these goals, the Oregon Secretary of State’s Archives Division formed a unique public-private partnership with Chaves Consulting Incorporated, and their business partner

Arikkan Incorporated, utilizing HP TRIM software to implement the first statewide electronic records management solution of its kind in the country.

Called the Oregon Records Management Solution (ORMS), the program is currently in its pilot phase, and is making access to government records easier, which makes government more transparent. ORMS also allows agencies to comply with Oregon’s public records law for scheduled notification of automated retention and destruction of records. HP TRIM is also Department of Defense 5015.2 (chapters 2, 3, and 4)-certified, enabling the Secretary’s office to manage records in line with the highest level of information security. And because HP TRIM integrates with various industry-leading software applications, the process of moving legacy records, such as Microsoft Office files, is straightforward.

Utilizing HP TRIM software, the Oregon Records Management Solution provides capabilities to support the State’s eDiscovery projects, helping legal teams produce and review large volumes of information. During the pilot phase, more than 700 employees across 11 city, county, and state agencies have used ORMS with HP TRIM to manage more than one million documents. “The feedback we’ve gotten from users so far has been very positive,” said Mary Beth Herkert, State Archivist with the Oregon Secretary of State’s office. Herkert added, “More agencies and users are on-boarding monthly.”

New system with HP TRIM minimizes information overload, legal risk, and liability

Herkert explained the process before the implementation took place, “We were trying to manage electronic records manually, but realized we needed to introduce technology to manage our information more effectively. The challenge was how to get both the smallest and largest agencies together on one system to save the state money in storage, cut risk, and reduce litigation costs.” After HP TRIM was successfully implemented in the Secretary of State’s office, they decided to release a competitive bid for implementing HP TRIM throughout the State. The contract was awarded to Chaves Consulting and their
partner Arikkan to deliver a uniquely packaged Solution as a Service (SaaS) using HP TRIM. The SaaS-standardized model included the hardware, software, training, and support that the agency needed to implement HP TRIM, and it is deployed in a private government cloud. The ORMS solution offers a low monthly per-user fee based on statewide economies of scale which make it possible for every agency—large or small—to participate. The solution fulfills the agencies’ need for records management, hardware, software, training, and support without requiring an up-front investment.

Before HP TRIM was implemented, the Secretary’s office tried to manage its electronic records, but found the process to be time consuming without being systematic or routine, leaving information volumes to continue growing. “Most state archivists don’t manage information until after documents have been created and used, but that process is cumbersome and does not work very well. HP TRIM lets us pivot to a front-end management solution where the records are managed as they are created,” said Herkert. “In addition, the ability to perform scheduled and automated destruction of records will not only minimize information overload, but reduce storage needs, legal risk, and liability.”

In addition to the Secretary of State’s Office, pilot agencies include Oregon Department of Energy; Oregon Department of Human Services Children, Adult, and Families Division; Oregon Public Utility Commission; Tualatin Hills Parks and Recreation District; and the cities of Beaverton, Dundee, Hillsboro, Milwaukie, and West Linn. In addition, the cities of St. Helen’s and Lebanon, as well as Tillamook County, have come on board as early adopters. The Secretary’s office anticipates more agencies coming on board, and a Federal Grant has been awarded to bring all of the current Oregon Governor’s office records online and in a partnership with the State of Washington to bring them into the HP TRIM SaaS solution.

The new system has shortened the amount of time it takes to fulfill public records requests. Previously, the process required pulling backup tapes, emails, and file servers to satisfy requests for information. Now, because information is in the system, it can be found quickly. Herkert said, “A recent request for the Secretary’s email from the first day in office to the present day, which included 80,000 emails, would have taken us about six days to gather, but instead it takes 90 seconds!”

Going forward, the ORMS system will allow citizens to request Public Records. This capability will be made possible through the WebDrawer feature of HP TRIM and will eliminate the step of having to take search requests to a city employee who must type in the request and wait for the result. “With the new system, public access will be much easier and more transparent. It will allow public servants to do a better job,” said Herkert.
HP TRIM enables transparent, efficient records management

With HP TRIM as the software cornerstone of the Secretary’s cloud-based records management system, state, city, and county agencies can manage, secure, and provide access to digital and physical documents. The innovative technology solution integrators at Arikkan solved a number of previously insurmountable IT issues to permit trusted connections and user authentication from differing agency network types into the private government cloud housed at Synergy Data Center and Services in Oregon.

About Chaves Consulting (CCI)

Since 1980, CCI has designed and implemented on-time, cost-effective, complex information system solutions for state and local government agencies throughout the United States. CCI has built a reputation for delivering exceptional customer service and product excellence that goes Beyond the Call®.

More information about CCI is available at www.chavesconsulting.com or by calling 800-435-4633.

About Arikkan, Inc.

Arikkan, Inc. is a leading technology integrator known for delivering on-time, complex, innovative Enterprise Solutions for state and local government throughout the United States. Arikkan has built a reputation for delivering exceptional client service and product excellence that exceeds client expectations.

More information about Arikkan, Inc. is available by e-mail info@arikkan.com or by calling 360-553-7966.

About HP Autonomy

HP Autonomy is a global leader in software that processes human information, or unstructured data, including social media, email, video, audio, text and web pages, etc. HP Autonomy’s powerful management and analytic tools for structured information together with its ability to extract meaning in real time from all forms of information, regardless of format, is a powerful tool for companies seeking to get the most out of their data. HP Autonomy’s product portfolio helps power companies through enterprise search analytics, business process management and OEM operations. HP Autonomy also offers information governance solutions in areas such as eDiscovery, content management and compliance, as well as marketing solutions that help companies grow revenue, such as web content management, online marketing optimization and rich media management.

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