

## The Road to Self Sufficiency - Electronic Records Management

The Office of Management and Budget's [M-12-18 OPM](#) Directive for Records Management requires federal agencies to manage all permanent electronic records in an electronic format to the fullest extent possible for eventual transfer and accessioning by NARA in an electronic format by December, 2019. The Directive requires that to the fullest extent possible, agencies eliminate paper and use electronic recordkeeping. While this change is mandatory, the directive will ultimately result in significant cost efficiencies within government organizations.

To comply with the Directive, there is a need for an aggressive, very experienced and well-established records management organization. The overall logistical complexity of the mandate is only one of the challenges that needs to be overcome to comply successfully. An organization must be able to make the effort **affordable** and **scalable** while maintaining a high-level of **quality** and **customer service**. They must also ensure that the **technology** meets current and future requirements and is able to provide **reporting** for decision makers.

Chickasaw Nation Industries (CNI) is a Native American Tribally-owned, Small Disadvantaged Business wholly owned by the Chickasaw Nation. CNI can offer customers contract accessibility through the direct awards of tribal sole source contracts up to \$22,000,000, dramatically speeding the award/contract start-up phase. With years of government contracting experience, and currently managing multiple government contracts valued at \$250,000,000 annually, CNI is more than capable to provide you with critical solutions to meet your electronic records management needs. CNI can also accommodate your HUB zone needs.

### **COMPETITIVE PRICING**

**The directive calls for an economically viable, automated records management solution.**

- CNI's flexible price-per-page allows the price to adjust depending on volume and metadata collection.
- Volume estimations help stay within expected budgets. CNI helps with these estimation efforts and is able to provide accurate averages.
- Software as a Service (SaaS) is advantageous to our customers as it allows for a fixed monthly cost without the burden of purchasing the necessary software, hardware or maintenance required for internal hosting. This supports your organizations Cloud First efforts.
- Short-term storage of documents allows customers to reclaim expensive storage space while documents are being scanned. This is included in CNI's Scanning Services.

### **SCALABILITY AND AGILITY**

**Electronic Records Management (ERM) processes and systems needs to be scalable, and flexible enough to meet ever-changing needs.**

- It is mandatory that an ERM system allow for high volume production and storage space to accommodate a customer's ever change needs. This helps to quickly ramp up large-scale projects involving millions of documents. CNI's ERM system is built to this standard in order to meet customer's current and future needs.



- Agile Project Management methodologies assure the Federal Government is provided with prompt, thoroughly tested, value-drive, and high-quality solutions. CNI incorporates these methodologies and works with our customers to anticipate and adapt our processes and technologies before the need arises within the constraints of the contract.

## **TECHNOLOGY**

### **ERM Software needs to allow for eventual self-sufficiency with current electronic systems and paper driven processes.**

- An ERM SaaS should allow for document viewing immediately upon upload and be user intuitive. We leverage the popular Laserfiche Repository solution in our SaaS, along with our in house developed CNI Imaging Portal. This combination allows for a customizable and user-friendly interface for users to view and upload documents. This solution can be hosted long-term in the FedRAMP Government Cloud or on location at your agency.
- An ERM SaaS needs to provide self-service capabilities allowing users to manage repository settings and documents within a structured, role based, secure environment. Laserfiche and the CNI Imaging Portal uses this role based security to ensure that users have the correct amount of access and control in our SaaS.
- Automated workflows must be used in the management and movement of documents to make certain documents are where they need to be. CNI's flexible automated workflow processes provides a seamless, effort-free management of documents in the repository. This enables the users to see enhanced services at a lower cost. This includes the processing of FOIA Requests.

## **QUALITY MANAGEMENT**

### **A high level of quality needs to be achieved to gain the trust of organizations while reducing the need for paper.**

- Quality audits need to be conducted at each phase of the records management process. CNI conducts these audits throughout the inventory, preparation, scanning, data entry, reassembly and shipping processes to ensure that we deliver a superior product in comparison to our competition.
- A high percentage of quality is needed to confirm documents are scanned and the correct data entry is performed. CNI's goal is to always deliver 100% quality for all phases of our document management services. Our staff is extensively cross-trained so they can understand the level of effort needed in each process to ensure quality. Our standards are documented in detailed Standard Operating Procedures.

## **REPORTING ADVANTAGES**

### **Flexible and reliable reporting needs to be available to the customer at all times in order to monitor the flow of data from electronic systems and paper processes.**

- Quality reports need to be provided to the customer to build trust and provide transparency in the handling of documents. Other reports need to be available so the customer can make decisions based upon their stored documents. CNI provides these reports upon request.



Detailed and varied activity reports are also available for management at every phase of the electronic records management process.

### **CUSTOMER SERVICE**

**Timely delivery of scanned images and resolutions to issues is mandatory in records management where employees use documents in their daily duties.**

- Responsiveness is required in Records Management. CNI guarantees our first response to a request or issue within 8 hours of notice. We work hand in hand with our customer to insure their documents are in the repository when they need them. This means we are in frequent communication and always willing to help.
- Fast startup abilities are necessary for a records management contract. Customers frequently need their documents to perform their daily duties. CNI is able to provide the quick transition times from current records management systems and can stand up an instance of our ERM SaaS within 72 hours.