



"The migration process from three legacy systems to Versatile Enterprise was a success for the State of Idaho. The Idaho State Historical Society saw immediate efficiencies and program improvements thanks to the implementation of Zasio products."

Mackenzie Stone

*State Records Center Manager
Idaho State Historical Society*

Summary

Established as a state agency in 1907, the Idaho State Historical Society (ISHS) is an extraordinary system of cultural and historical resources, including the Idaho State Archives and the State Record Center. These programs deliver essential state services by providing critical storage and preservation needs of government records to 80 state agencies, 44 counties, and 230 cities.

ISHS recognized that their three unsupported, unintegrated legacy records management systems needed to be replaced. They knew they needed a single, long-term sustainable solution that could meet the varying needs of their diverse customer base. The former resources were increasingly unreliable, lacked proper technical support, and didn't meet current operational needs.

Zasio was awarded the state contract through the RFP process in August 2015 and a statewide implementation of the new database was completed within a year.

Objectives

- Implement a single, long-term sustainable records management software solution to replace three essentially unsupported legacy systems that were unable to communicate with each other
- Update information management workflow
- Allow the ability to meet the varying needs of a diverse customer base
- Offer the ability to handle both public and confidential records management in more than one physical location
- Provide a robust accounting system for the State Record Center's cost recovery program

Solution

Efficiency. ISHS sought to replace their outdated records management workflow with a single system. Zasio had the answer with Versatile Enterprise, its flagship records management solution. Of course, data in the legacy systems still had to get into Enterprise. To eliminate the need for busy ISHS employees to re-enter records, Zasio merged meta-data fields from the three legacy systems and imported the records into Enterprise. Zasio was careful to ensure both completeness and accuracy of the migrated data. With all their records management needs now available in one application, ISHS was empowered with more control over their records and better reporting analysis.

Automation. Another issue ISHS faced with their old systems was that they lacked a way to efficiently bill for records management operations. The solution? Versatile Enterprise's built-in chargeback system, which allowed them to bill for file check out, box check out, and records storage. This permitted them to automate the cost of circulating their records and more easily track inventory.

Convenience. Most businesses don't have time for extensive training sessions on new software and ISHS was no exception. To get everyone in the organization up-and-running with the new system quickly, Zasio employed Versatile Web Enterprise, which allows authorized users to access records using a web browser. With an intuitive user interface and the ability to send electronic requests to check out records and submit file or box creation requests, ISHS employees could access all their records information from anywhere, any time.

Communication. To ensure the new information management workflow was communicated to key stakeholders, Zasio implemented Versatile Notification System to allow users to receive automated email notifications when files or boxes are added or when comments on these items are made. Because notifications can be customized, ISHS can add more notifications in the future as their needs grow.

Peace of Mind. Now that ISHS has a supported and maintained records management product, they can enjoy the opportunity to expand their records management capabilities with future releases and feel at-ease knowing the solution to any question about their software is only a phone call away.

Results

ISHS saw the following positive results:

- Modernized information management of government records data
- A seamless and secure records management interface to carry out statutory obligation to preserve Idaho historic resources and provide records management services
- A single access point for statewide employees to manage government records at the Idaho State Archives and the State Record Center for the first time in the State of Idaho
- Improved intellectual control of current holdings at ISHS
- Significantly augmented audit trail—ISHS now knows more about their historical data than ever before
- Migrated 86,000 boxes and 450,000 files from three legacy systems into a single, intuitive system

About Zasio

For 30 years, Zasio Enterprises, Inc. has been paving the way in records management and information governance consulting. We've walked clients through every stage of information governance—from education and planning to implementation and maintenance. We have experts at all levels of our organization who pride themselves on customer satisfaction and nurture lasting relationships with every client. No matter how big your business or the number of records you have, our dedicated team of attorneys, engineers, and technical support specialists are up to the task and ready for the challenge. We've been here since 1987 supporting clients just like you, and we're here to stay. Learn more at www.zasio.com.

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