



## Legislation Details (With Text)

**File #:** 1819-0255  
**Type:** Agenda Item **Status:** Agenda Ready  
**File created:** 5/9/2019 **In control:** School Board  
**On agenda:** 6/11/2019 **Final action:**  
**Title:** Approve Renewal of Records Management and Workflow Solutions with Upland  
**Sponsors:**  
**Indexes:**  
**Code sections:**  
**Attachments:** 1. Upland\_2019 Renewal.pdf, 2. Upland\_Workflow 2019.pdf, 3. Upland\_SOW Contract Routing.pdf

Date	Ver.	Action By	Action	Result
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### TITLE

Approve Renewal of Records Management and Workflow Solutions with Upland

### BACKGROUND INFORMATION

Upland is the District's existing cloud based records management solution used for both student and business records.

Along with the 2019-2020 records management solution renewal, a new solution is being added to the software suite which would allow contracts/forms to be electronically approved through a workflow and then filed within records management. In September the Board approved the existing records management solution in the amount of \$66,420. Workflow brings an increase to that annual cost of \$8,000. In order to roll this at the beginning of the 2019-2020 FY we need to pay the \$12,000 to be able to complete the implementation and training prior to July 1.

Based on the above, we are requesting an increase to the 2018-2019 NTE spend with Upland by \$12,000 to allow for implementation and training of the new workflow (new NTE \$78,500) as well as approval of the 2019-2020 records management and workflow solution in the amount of NTE \$75,000.

### BUDGET INFORMATION

Item Budgeted? Yes

Total Cost: 18-19 Spend \$78,500 (Increase of \$12,000) / 19/20 Spend \$75,000 Renewal

Contract Originator: Suanne Lee, Director of Internal Services

Board Meeting Date: June 11, 2019

### RECOMMENDATION

## Approval of Renewal with Upland Filebound Document Management and Workflow Solutions