



Legislation Text

File #: 1819-0255, **Version:** 1

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