EXECUTIVE SUMMARY

Direct Negotiation Agreement
58-035E – Upland FileBound

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For over seventeen (17) years, the District has used several software products provided by Advance Processing & Imaging (API). Upland FileBound acquired API. The new agreement between the District and Upland FileBound, formerly known as API, is for the maintenance of software products and support services. The products currently being used by the District are OptiView, OptiWorkFlow, OptiSpool, and Agenda Maker.

- OptiView is used by departments and the technical schools to digitize paper documents and index the images for future retrieval. The OptiView scanning tool allows schools and departments the ability to organize and search documents.

- OptiWorkFlow is a document management software product used by district staff to convert paper forms to an electronic format. The OptiWorkFlow is the software that tracks the agendas for School Board items.

- OptiSpool is used to store reports generated in the data center in a digital format. OptiSpool has a form creation software tool allowing forms to include headings, borders, and graphics and merging of data to create a final product, which will be stored electronically and printed only when necessary. The printing of student report cards is produced using the OptiSpool tool for creating forms.

- Agenda Maker (**eAgenda**) is used by Official School Board Records for the creation of board agendas, electronic storage, and document management.

The Master Service Agreement provides the District with a document management solution that has resulted in the District reducing the amount of equipment and staff support required to maintain and store documents, software upgrades, and a reduction in paper and ink consumables.

FINANCIAL IMPACT

The District negotiated a three (3) year Statement of Work (SOW) with Upland FileBound. The first year of the SOW, Upland maintains the maintenance fee at the current level. The maintenance fee is an annual subscription that the District has the option to renew or terminate at the end of each year. Information & Technology (I & T) is requesting a spending authority of $235,848 for year one (1) only.

The maintenance fee will increase five (5) percent for year two (2) and year three (3). The annual maintenance fee for year two (2) and three (3) will be included in the I & T Hardware/Software budget.

Contract Term	Annual Fee
First year	$235,848
Total	**235,848**