
MEMORANDUM

TO: The Honorable Mayor and City Council

FROM: Chad Michaelis, Director of Information Technology

DATE: **September 20, 2021**

SUBJECT: **Recommendation for Records Management System**

Request

Approve the resolution for the purchase of a Records Management System.

Background

In 2020, the City Manager approached the Information Technology Department with concerns about the City's ability to find important documents and communications. The modern workplace no longer uses paper memorandums for many important decisions, agreements, and communications. These important records are now residing in various systems including emails, file servers and cloud storage locations. These new locations create significant challenges when the record needs to be retrieved or researched. After reviewing these concerns with several Departments and the City Manager we identified the following record groupings that are priorities for a Records Management System:

- Developments
- Permits
- Agreements
- Correspondence
- Ordinances
- Resolutions

A Records Management System will provide the necessary structure and workflow to allow these important records to be classified, stored, and retrieved.

IT staff evaluated three (3) vendors that provide records management solutions:

- Laserfiche from Proven IT
- RecordsPoint
- AvePoint

Each vendor has unique offerings and approaches that make direct comparisons difficult. Only Laserfiche from Proven IT provided a competitively priced solution with a map integration.



Scope of Work

This purchase will provide the installation and configuration of the Laserfiche records management system including:

- Security configuration
- Configuring system templates for developments, permits, agreements, correspondence, ordinances, and resolutions.
- Ability to associate records to map locations including PINs and addresses
- Ability to retrieve records with an intuitive search tool
- Ability to require critical meta data elements such as dates, unique identifiers, description, and key contacts.
- Audit ability to ensure records are being added correctly.
- Integration to allow staff to retrieve records from a map (click on map location to see related records)

Budget Impact

The total first year cost to purchase and implement Laserfiche from Proven IT is \$22,032. The IT Department 2021 budget includes \$23,640 for this purchase in account 13000015-68001.

Recommendation

Staff recommends that the City Council adopt the resolution authorizing the execution of Agreement No. 232 for a Records Management System with Proven IT for a three (3) year term (\$22,032 annually) and a total amount not to exceed \$66,096.

The Agreement and exhibits are on file in the City Clerk's office and available for review.

RESOLUTION R-2021-

**A RESOLUTION AUTHORIZING THE EXECUTION OF AGREEMENT NO. 232 WITH
PROVEN IT FOR A RECORDS MANAGEMENT SYSTEM FOR A THREE (3) YEAR TERM (\$22,032 ANNUALLY)
AND A TOTAL AMOUNT NOT TO EXCEED \$66,096**

WHEREAS, the City prepared a Request for Quotation package (RFQ Number 21-39) for a Records Management System; and

WHEREAS, the City solicited quotes and Proven IT was determined to be the lowest, responsive, responsible bidder with a bid amount of \$22,032 annually for a three-year commitment (\$66,096 for a three-year term); and

WHEREAS, the City budgeted funds for CY2021 in the General Fund, Information Technology-Software Licenses/Maintenance account for a total amount of \$23,640 for a Records Management System; and

WHEREAS, both parties agree to the terms and conditions of City of Wheaton Agreement No. 232 for a Records Management System; and

WHEREAS, the corporate authorities of the City of Wheaton, DuPage County, Illinois find it reasonable and appropriate to enter into an agreement with Proven IT, 718450 Crossing Drive, Tinley Park, Illinois, 60487, for a Records Management System.

NOW, THEREFORE, BE IT RESOLVED, by the Mayor and City Council of the City of Wheaton, Illinois, that:

The Mayor is hereby authorized to execute, and the City Clerk is hereby directed to attest to City of Wheaton Agreement No. 232 with Proven IT, 18450 Crossing Drive, Tinley Park, Illinois, 60487, for a Records Management System for a three (3) year term (\$22,032 annually) and a total amount not to exceed \$66,096; and that a copy of that certain City of Wheaton Agreement No. 232 is on file with the City Clerk's office as Exhibit A to this Resolution R-2021-____ and is hereby incorporated into this Resolution as if fully set forth herein.

ADOPTED this 20th day of September 2021.

Mayor

ATTEST:

City Clerk

Roll Call Vote:

Ayes:
Nays:
Absent: