



Board Action Required ☒ X

No Action Required ☐

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To: Coppell ISD Board of Trustees  
From: Denise Sullivan  
Date: January 10, 2011

cc: Dr. Jeff Turner, Kelly Penny, Sid Grant

**Re: Electronic Document Management System**

Due to the need for an electronic document management storage system for student records, the District requested proposals and received responses from three cooperative vendors. The following vendors submitted proposals; Documation (PSA - Purchasing Solutions Alliance), Pitney Bowes (Buyboard), and eDoc Strategies (Buyboard).

The staff members (CHS Registrar, Executive Director of Technology, PEIMS Coordinator, and Director of Purchasing) that will be heavily involved in data storage management evaluated each system for best value, meeting district needs, pricing, and references. It was determined that the proposal submitted for MaxxVault software by Documation will provide the best product and pricing to meet the District's needs.

This system will:

- Improve productivity and security by storing and retrieving student records electronically;
- Quickly locate documents based on searching indexed key student information;
- Leverage existing student information to automatically index documents;
- Ensure Disaster Recovery capability by storing electronic versions of legally required documents onsite, as well as, offsite through regularly scheduled data backups;
- Safeguards documents from being misplaced;
- Reduces storage of boxes;
- Provides access to sensitive documents based upon security level authorization;
- Will not require new scanners. Existing Ricoh copiers will be utilized to scan documents.

The District anticipates implementing electronic document storage to Intervention Services, Human Resources, and the Business Office.

Documation guarantees successful integration of MaxxVault's software with Pentamation (Student Software) and EDPro from Tyler Technologies (Financial Management Software). If Documation cannot successfully integrate with both of these software packages, Coppell ISD will have the option to cancel the agreement with Documation and receive a full refund of the initial partial payment. Payment in full will not be made until the system is successfully implemented.

The total cost for the purchase of the software, professional services to implement the program, and the annual maintenance for five years is \$30,088.00 by Documation, and \$43,232.00 from Pitney Bowes for the same time period. EDoc Strategies' proposal did not meet specifications. The cost of the MaxxVault software proposed by Documation will be paid for from bond proceeds that were initially designated for the financial software conversion that is no longer required.

**RECOMMENDATION: That the Coppell ISD Board of Trustees approve the MaxxVault software by Documation for the document management solution for Coppell ISD.**