

BOARD MEETING DATE: May 7, 2021

AGENDA NO. 8

PROPOSAL: Authorize Purchase of OnBase Software Support

SYNOPSIS South Coast AQMD uses OnBase software for its electronic document management system to manage critical documents and to support the Record Retention Policy. Software subscription and support for OnBase expires on July 31, 2021. This action is to obtain approval for sole source purchase of OnBase software subscription and support for one year from Information Management's FY 2020-21 Budget. Funds for this purchase (\$140,000) are conditional on approval of the Proposed FY 2021-22 Budget.

COMMITTEE: Administrative, April 9, 2021; Recommended for Approval

**RECOMMENDED ACTIONS:**

Authorize the Procurement Manager to purchase OnBase software subscription and support for one year from Hyland Software at a cost not to exceed \$140,000 contingent on approval of this funding in Information Management's Proposed FY 2021-22 Budget, Services and Supplies Major Object, Professional and Special Services Account.

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Executive Officer

RMM:MH;hlp

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**Background**

South Coast AQMD uses OnBase software as its electronic document management system, which has maintained South Coast AQMD documents and other critical records since 1990. Total storage to date is over three million multi-page documents. OnBase is used by many of South Coast AQMD's mission critical web applications including Online Application Filing, Asbestos Notifications, and Oil and Gas Well Electronic Notification and Reporting. OnBase is a Windows-based, menu-driven, document

management system designed to store and retrieve critical documents in electronic format. The system provides concurrent information to multiple workstations simultaneously. It has a flexible compound document structure where black-and-white or color images co-exist with text and data within a single document. It stores various types of documents such as Microsoft Word documents, Outlook emails, PDFs, videos and data files.

The system includes document routing and ad-hoc, scheduled point-to-point, and broadcast distribution of documents. It contains a complete set of markup and annotation tools that allow users to add notes, comments and drawings to pages without compromising the original document's integrity. The system has full network support so information can be distributed rapidly within an organization regardless of architecture. Finally, the system has an extensive number of features to allow the secure display of documents on South Coast AQMD's internal and external websites and on iPhone, iPad and Android mobile applications. OnBase software subscription and support expires on July 31, 2021.

### **Proposal**

Hyland Software is the sole manufacturer and provider of OnBase software and is, therefore, the only source for its maintenance support licensing agreements. Staff recommends the purchase of OnBase software subscription and support for one year from Hyland Software at a cost of \$140,000.

### **Sole Source Justification**

Section VIII.B.2 of the Procurement Policy and Procedure identifies circumstances under which a sole source purchase award may be justified. This request for a sole source award is made under provision VIII.B.2.c.(2) and (3). The products and services are available from only the sole source; involve the use of proprietary technology; and use key contractor-owned assets for project performance. The cost of these support services reflects General Services Administration pricing.

### **Resource Impacts**

Sufficient funds are included in Information Management's Proposed FY 2021-22 Budget within the Services and Supplies Major Object Professional and Special Services Account.