



Legislation Details (With Text)

File #: 19-2832 **Name:** AUTHORIZATION TO AMEND AN EXISTING AGREEMENT WITH AVOLVE SOFTWARE FOR PROJECTDOX UPGRADES

Type: Purchasing/Contract **In control:** Village Council

On agenda: 4/23/2019 **Final action:**

Title: AUTHORIZATION TO AMEND AN EXISTING AGREEMENT WITH AVOLVE SOFTWARE FOR PROJECTDOX UPGRADES

Code sections:

Attachments: 1. 1. Change Request - Bldg_Eng_Utility Workflow (CR#01142019), 2. 2. Change Request - Planning Integration (CR, 3. 3. New Test Environment Quote (201902-1360)

Date	Ver.	Action By	Action	Result
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ITEM: AUTHORIZATION TO AMEND AN EXISTING AGREEMENT WITH AVOLVE SOFTWARE FOR PROJECTDOX UPGRADES

REQUEST: Authorization to amend an existing Agreement with Avolve Software, for ProjectDox upgrades, in the amount of \$40,200.00.

EXPLANATION: ProjectDox is the current electronic plan review software that routes Building, Engineering, and Utility permit applications through the plan review process. ProjectDox comes with an advanced set of tools - eForms, project templates, workflows, and folder structures which has helped to automate and expedite the permitting process by allowing files to be submitted online and routed digitally through the permitting process. Once approved, the applicants have access to approved plans and permit cards online, to access or download at their convenience. The Village has been utilizing ProjectDox since 2009.

On June 12, 2018, Council approved upgrades to the ProjectDox software, including custom integration with the Village's new Enterprise Resource Planning (ERP) system (Tyler Munis-EnerGov), and integration to a Document Management System, totaling \$82,750.

While the new Tyler Munis ERP software includes a module whereby the Planning Department is able to complete electronic plan reviews using the new ERP software, instead of ProjectDox, after extensive testing, staff has determined a simplified planning permit process could be accomplished in ProjectDox (existing software).

Based on testing and consulting with ProjectDox officials, staff is requesting the following ProjectDox upgrades at a cost of \$40,200:

- 1) Planning Integration allowing applicants to upload documents to Citizen Self Service portal rather than direct to ProjectDox (\$7,200).
- 2) Workflow enhancements allowing for the application of business rules to specified workflow activities/tasks to help streamline the permitting process (\$8,100).

- 3) ProjectDox Test Environment - Wellington is in the process of implementing EnerGov as a replacement software for permitting. With the implementation of EnerGov, electronic plan review will be used for the Building, Engineering, Utility, and Planning permits. The test environment will be used to test different configurations, upgrades, and test scenarios without compromising the live environment (\$24,900).

Staff recommends amending the existing agreement with Avolve Software for the upgrades, as described above at a total cost of \$40,200.00.

Pursuant to the Village's Purchasing Manual, services performed by the equipment manufacturer or manufacturer's service representative, are exempt from competition; however, since expenditures exceed \$25,000, Council approval is required.

BUDGET AMENDMENT REQUIRED: NO

PUBLIC HEARING: NO **QUASI-JUDICIAL:**

FIRST READING: **SECOND READING:**

LEGAL SUFFICIENCY: YES

FISCAL IMPACT: Funds for these configuration upgrades are budgeted in various budgets.

WELLINGTON FUNDAMENTAL: Responsive Government

RECOMMENDATION: Authorization to amend an existing Agreement with Avolve Software, for ProjectDox upgrades, in the amount of \$40,200.00.