



CITY OF HOUSTON - CITY COUNCIL

Meeting Date: 11/6/2019

ALL

Item Creation Date: 10/21/2019

N29232 - Aderant Total Office Software Upgrade - MOTION

Agenda Item#: 12.

Background:

S21-N29232 - Approve the sole source purchase from Aderant North America, Inc. for the Aderant Total Office software upgrade in the total amount of \$19,050.00 for the Legal Department.

Specific Explanation:

The City Attorney and the Chief Procurement Officer recommend that City Council approve the purchase for the Aderant Total Office software upgrade from **Aderant North America, Inc.** in the total amount of **\$19,050.00** for the Legal Department, and that authorization be given to issue a purchase order.

In 2006, the Legal Department purchased perpetual software licenses for an integrated records/claims management database system referred to as "Client Profiles" from the software publisher Aderant North America, Inc. Currently, the Legal Department uses version 8.5 of Clinet Profiles to a new product, "Aderant Total Office v.9.1" (ATO) that is designed also to work with current versions of Microsoft technologies.

Version 8.5 of Client Profiles operates on an outdated server operating system, database server, and end user operating system that will no longer be supported by Microsoft beyond January 14, 2020. It also is not compatible with newer supported versions of server and PC operating systems. Further, Houston IT Services (HITS) is requiring all department to migrate to supported versions of server, database, and end user operating system to remain in compliance with the City's IT security policies. In order to remain in compliance with the City's IT security policies, version 8.5 of Client Profiles must be updated to ATO, Aderant's latest software and one which is integrated with current versions of Microsoft technologies. Accordingly, this agreement governs the software upgrade from version 8.5 of Client Profiles to ATO.

The ATO upgrade is built on the Microsoft technologies framework, which permits the users to function both within the case management environment and Microsoft Office Suite. The ATO upgrade includes a document management system that provides for all case related documents to be attached to an electronic case file, organized by document type, sub-type, version and user or practice group. It includes numerous features such as document view, full-text searching, conversion of Word and WordPerfect documents to PDF, as well as conversion of scanned documents to TIFF, PDF, Word, or plain text. It also provides functionality to define document types and sub-types permitting further customization within the litigation and transactions sections of the Legal Department. The Legal Department and Houston Information Technology (HITS) have made several attempts to work with the current version, but have not been successful. HITS is requiring the department to transition to Windows 10 and upgrade its servers. Neither of these will be possible without upgrading the current version.

During FY2020 the Legal Department previously issued a manual payment voucher for support from Aderant North America, Inc. totaling \$42,105.00. With the issuance of this purchase order for \$19,050.00, the aggregate total spend will be \$61,155.00, and therefore requires City Council approval.

This recommendation was made pursuant to Chapter 252, Section 252.022 (a) (7) (A) a procurement of items that are available from only one source because of patents, copyrights, secret processes, or natural monopolies of the Texas Local Government Code for exempted procurements.

MWBE


This procurement is exempt from the City's M/WBE subcontracting goals as the total expenditure amount does not exceed the \$100,000.00 threshold.

Hire Houston First:

This procurement is exempt from City's Hire Houston First Ordinance. Bid/proposal were not solicited because the department is utilizing a sole source contractor for this purchase.

Fiscal Note:

Funding for this item is included in the FY2020 Adopted Budget. Therefore, No Fiscal Note is required as stated in the Financial Policies.

DocuSigned by:

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10/25/2019

Jerry Adams, Chief Procurement Officer
Finance/Strategic Procurement Division

Department Approval Authority Signature

Estimated Spending Authority

Department	FY19	Out Years	Total
Legal	\$ 19,050.00	\$ 0.00	\$19,050.00

Amount of Funding:

\$ 9,050.00 General Fund (1000)

\$10,000.00 Property & Casualty Fund (1004)

\$19,050.00 Total

Contact Information:

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Deidra Penny, 1 st Asst. City Attorney	LGL	(832) 393-6246

ATTACHMENTS:

Description

N29232 Sole Source Justification
 N29232 CPO Approved Email
 N29232 Affidavit of Ownership (FL)
 N29232 Fair Campaign Ordinance
 N29232 Aderant North America, Inc.

Type

Backup Material
 Backup Material
 Backup Material
 Backup Material
 Backup Material

FIN - Funding info 1000, 1004

Financial Information