



Department of Administration  
Purchasing Division  
2019 Washington Street East  
Post Office Box 50130  
Charleston, WV 25305-0130

# State of West Virginia Delivery Order

Order Date: 03-07-2023

CORRECT ORDER NUMBER MUST APPEAR  
ON ALL PACKAGES, INVOICES, AND  
SHIPPING PAPERS. QUESTIONS  
CONCERNING THIS ORDER SHOULD BE  
DIRECTED TO THE DEPARTMENT  
CONTACT.

Order Number:	CDO 0803 0081 DOT2300000032 1	Procurement Folder:	1191158
Document Name:	E-Permitting Portal Project (81230102)	Reason for Modification:	
Document Description:	E-Permitting Portal Project (81230102)		
Procurement Type:	Central Delivery Order		
Buyer Name:	John W Estep		
Telephone:	304-558-2566		
Email:	john.w.estep@wv.gov		
Shipping Method:	Best Way	Master Agreement Number:	CMA 0803 DOT2300000003 1
Free on Board:	FOB Dest, Freight Prepaid		

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: 000000161706 DATABANK IMX LLC PO Box 829878  Philadelphia PA 19182-9878 US Vendor Contact Phone: 5614595987 Extension: Discount Details: <table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>No</td><td></td><td></td></tr><tr><td>#3</td><td>No</td><td></td><td></td></tr><tr><td>#4</td><td>No</td><td></td><td></td></tr></tbody></table>		Discount Allowed	Discount Percentage	Discount Days	#1	No	0.0000	0	#2	No			#3	No			#4	No			Requestor Name: John P Toomey Requestor Phone: 304-352-0540 Requestor Email: John.P.Toomey@wv.gov  <b>23</b> FILE LOCATION _____
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

INVOICE TO	SHIP TO
INFORMATION TECHNOLOGY DIVISION DEPT. OF TRANSPORTATION  1900 KANAWHA BLVD E, BLD. 5 RM-720  CHARLESTON WV 25305  US	INFORMATION TECHNOLOGY DIVISION DEPT. OF TRANSPORTATION  1900 KANAWHA BLVD E, BLD. 5 RM-720  CHARLESTON WV 25305  US

Total Order Amount: \$282,030.00

Purchasing Division's File Copy

JE 3/21/23

PURCHASING DIVISION AUTHORIZATION  
DATE: *Tanya* 3/21/23  
ELECTRONIC SIGNATURE ON FILE

ENTERED

ENCUMBRANCE CERTIFICATION  
DATE: *Beverly Tolson* 3-22-23  
ELECTRONIC SIGNATURE ON FILE



**Extended Description:**

E-Permitting Portal Project (81230102)

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	43232200	0.00000		\$0.0000	\$48,090.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2023-03-15	2024-03-14				

**Commodity Line Description:** Business Consultant - Professional Services**Extended Description:**

Business Consultant - Professional Services

229 hours @ \$210.00/ hr

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	43232200	0.00000		\$0.0000	\$187,110.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2023-03-15	2024-03-24				

**Commodity Line Description:** Database Engineer - Professional Services**Extended Description:**

Database Engineer - Professional Services

891 hours @ \$210.00/ hr

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	43232200	0.00000		\$0.0000	\$46,830.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2023-03-15	2024-03-14				

**Commodity Line Description:** Program Manager - Professional Services**Extended Description:**

Program Manager - Professional Services

223 hours @ \$210.00/ hr





# WEST VIRGINIA DEPARTMENT OF TRANSPORTATION

## BUDGETARY ESTIMATE

### E-PERMITTING PORTAL PROJECT

MARCH 6, 2023



**DataBank**  
A KYOCERA GROUP COMPANY



## SOLUTION OVERVIEW

West Virginia Department of Transportation (hereinafter “Customer” or “Client”) is seeking a Permitting Portal solution built on their existing OnBase platform. This process will begin with an applicant accessing the WV DOT developed Portal in order to submit an application via an OnBase Unity Form. Once submitted, this application will route through an OnBase Workflow for various levels of approval and review. Upon completion of the Workflow process, the results will be communicated back to the original applicant. While there are multiple departments and processes that will ultimately need this solution, the initial focus of this project is for the Entry Permitting and related MM109 Form based processes.

Customer will be leveraging DataBank IMX, a Kyocera Company (hereinafter “DataBank”) to design, implement, and support the solution.

## PROJECT OVERVIEW AND SCOPE

- **OnBase Taxonomy and Configuration**
  - Standard OnBase configuration for Document Types, Keywords, Autofill Keyword Sets, Custom Queries, File Cabinets, and Capture Methods (VPD, Acquisition) – along with User Group security configuration.
- **Permit Application Portal**
  - This will be developed and maintained by WV DOT and will launch the appropriate Unity Form for the applicant (with data injection). This portal may also be used for delivering content back to the applicant (in addition to email).
  - The general concept of the portal is that it will provide a persistent login (or anonymous access) for applicants to submit permit applications. Upon starting an application, the user will be presented with a series of (wizard style) questions via the portal, which will ultimately determine which specific application, and designated Unity Form, is needed (or allow for direct launch of Unity Form). The portal code will then call/open the chosen Unity Form, and pass any/all relevant data (e.g. User ID, Name) into the Unity Form (via URL coding) for presentation to the user to complete. The user will then complete the Unity Form, which will submit directly into OnBase and the workflow.
  - One potential difficulty area is around the ability for a submitter to save & continue a form. This would only be possible for submitters that have created an account on the portal, but if they did then it would require some form of submitting the form, then allowing a link back to the form from the portal that they could re-open and complete. There would also need to be some mechanic of allowing for an override of required fields for this scenario, and a workflow recognition of this happening. Overall, it is possible, but in a work-around way and would take some considerable time to accomplish.
  - In addition to the primary Unity Form launch function, it is also desired to create a SQL View of OnBase data that can be accessed via the portal for presentation to the user as desired by WV DOT.
  - While not definitely a part of this scope, it has also been discussed that this portal will surface specific OnBase content (e.g. Plans, MM109) to the user via DocPop or QueryPop methods. At this point, this effort should be considered likely (but still optional), and therefore in scope until determined otherwise. This may also need to include the ability for additional OnBase upload capability (via Sweep, or Upload portlet).
  - It is also worth noting that this portal will be doing additional functions, but the scope of this project should be limited to the above-described needs.





- **Application Forms**

- These will be built as Unity Forms. These forms will act as the primary workflow document, continue to allow for internal only data entry during the workflow and output to the MM109 form for completion.
- Within the Entry Permit program, there are multiple sub-types, which are listed below. It has not yet been determined whether it is best for each sub type to have its' own Unity Form, some concatenation of forms with dynamic presentation based on the sub-type, or a single dynamic form. However, it is believed that a single form per sub-type will be the easiest to maintain over time, even if it does create the most potential initial configuration (which should be minimized due the mostly repetitive nature of the forms across the sub-types).
  - **Residential:** Loosely considered the baseline standard version of the form.
  - **Commercial:** Similar, but some additional fields.
    - **Drilling:** Some additional Drilling specific fields.
    - **Industrial:** Some additional Industrial specific fields.
    - **Logging:** Some additional Logging specific fields.
    - **Oil & Gas:** Some additional Oil & Gas specific fields.
    - **Utilities:** Some additional Utilities specific fields.
  - **Temporary**
  - **Miscellaneous**
- As stated in the Portal section, it is expected that these Unity Forms will be launched via the portal once the correct form type has been determined, and that it will pass in any/all relevant data to the form. The user will then complete the form and submit it into OnBase.
- The following additional components should also be considered in scope:
  - **Processing Tab:** An additional Tab or Section to account for internal processing. This will likely take the form of a checklist with some data fields to be filled out by WV DOT as the process the application, along with any relevant automated Workflow detail.
  - **Map Lookup:** The concept is for the user to be able to click a button to locate the property in question on a map, which will subsequently autofill the Latitude & Longitude (along with any other relevant & Available data) onto the form.
    - **NOTE:** The exact requirements for this functionality and level of effort will need to be determined during the Discovery sessions.
    - **NOTE:** This may be something WV DOT can do as part of the portal and pass into the Unity Form.

- **Processing Workflow**

- Upon application submission, the processing workflow will manage the multiple routing and approval stages, and allow for deviation from the main process as needed by application type. At the conclusion of the workflow, an email will be delivered to the original applicants with relevant data in the email body and attached documents. This will also involve some version of electronic signature.
- Workflow scope will include:
  - **Lifecycle:** 1
  - **Queues:**
    - **Initial:** Any automated ingestion logic
    - **Intake:** Triage and assignment
    - **Review:** Document & Application review, site visits, data gathering, etc.
    - **Applicant Update:** Email communication with applicant to fix/update application





- **OA:** Return to OA for further processing.
- **Final Review**
- **Engineer & Other Approval/Review:** Queues, with sub type specific routing rules
- **Completion:** Any/All final processing steps
  - **CSV Data Output:** Data feed for State Treasurer (Invoice #, Permit #, Total Amount, etc.)
  - **Email To Applicant:** Email must include document attachments, email template, and fully editable Email body (primarily to include a list of deficiencies or manual detail)
- **Additional Content & Data:** Ability to add documents, and data on the Unity Form (including checklist)
- **Letter Composition:** (Details in Document Composition section)
- **MM109 Conversion:** Application Unity Form must be converted to MM109 format (PDF like)
- **Signature:** The exact signature needs have not been fully defined, but what is known is that there must be some accounting for the ability of internal reviewers/approvers to 'sign' the application. There has been discussion of using AdobeSign or DocuSign, Unity Form Signatures, OnBase PDF Sign functions, and even Workflow Tasks as signatures. This requirement will need to be determined during Discovery before exact scope can be accounted for.
- **Auto Void:** If in process 1+ year
- **Email Reminders:** Not expected to be in scope.
- **Print Case Documents:** To allow them to be taken into the field if necessary.
- **Image Form Support:** Workflow must support process for initial receipt of paper form.
- **Invoice Matching:** Would involve generation of invoice data and individual objects, which would also be converted to PDF and printed in the background. Then an import of CSV data into individual html forms for matching as a distinct part of workflow. This is the next stage of the CSV output to the Treasurer. Likely will require a dedicated Lifecycle & OnBase Auto-fill Keyword Set functionality for this capability.
- **OPTIONAL 1 – Packet Creation:** If documents need to be combined into a single packet for distribution to the applicant. This is not currently included in the budgetary estimate scope.
- **Document Composition**
  - Per the conclusions of the application process, Doc Comp will be used to compose letters for delivery back to the applicant.
  - Document Composition Templates:
    - **Approval**
    - **Reasons Can't Approve**
    - **Extension**
    - **Voided**
    - **Additional Information Required (Possible)**





## PRICING BREAKDOWN

### Professional Services Estimate

Description	Contract Item No	Estimated Hours	Rate	Estimated Cost
Business Consultant – Professional Services	4.1.7.1.2.2	229.0	\$210.00	\$48,090.00
Database Engineer – Professional Services	4.1.7.1.2.4	891.0	\$210.00	\$187,110.00
Program Manager – Professional Services	4.1.7.1.2.9	223.0	\$210.00	\$46,830.00
<b>Professional Services Estimate Total</b>		<b>1343.0</b>	<b>\$210.00</b>	<b>\$282,030.00</b>

**Note:** All estimates of fees or time required to complete the project are approximations of the anticipated amount of time needed to complete the project. Client will be invoiced based on the amount of time actually required to complete the project. DataBank will bill monthly for services performed.

It is important to note that scope can change throughout the lifecycle of a project requiring the use of DataBank's change order process. DataBank recommends Client add a contingency reserve of 20% of total project estimate to account for change orders and additional request uncovered during the Discovery.

## PROJECT ASSUMPTIONS

1. This estimate is subject to changes in the price for software and licenses, maintenance, and Professional Services upon completion of Discovery and DataBank receiving enough information, sample documents, requirements, etc.. to properly price the solution.
2. Discovery is required in order to develop and issue an Implementation SOW (Statement of Work) that will define the solution development and implementation effort. The SOW issued upon completion of the discovery effort will reflect the final services pricing required to deliver the solution.
3. Budgetary Estimate includes the following tasks for discovery and design:
  - Conduct Discovery sessions with Client Subject Matter Experts (SMEs) and technical experts from IT, interfaces, and applications to identify business and technical requirements.
  - Draft Solution Design Document (SDD) and review with Client.
4. Budgetary Estimate includes the following tasks for solution configuration:
  - Infrastructure Setup
    - DMZ Server Setup Assistance
  - Basic OnBase components
    - Disk Group (1)
    - Document Type Group (1)
    - Document Types (30)
    - Keywords (30)
    - User Security Group (1)
      - Users (7)
  - Capture





- Unity Acquisition, VPD, Sweep
  - Autofill Keyword Sets (1)
  - Custom Queries (3)
  - Foldering
    - File Cabinet (1)
    - Child (1)
  - Workflow
    - Lifecycles (1)
    - Queues (15)
    - Ad-hoc Tasks (30)
    - Notifications (3)
    - Timers (3)
    - Portfolio Relations (WF Folder)
  - Document Composition Templates (5)
  - DIP (1)
  - Electronic Forms (up to 10)
    - Application
    - Residential
    - Commercial Drilling
    - Commercial Industrial
    - Commercial Logging
    - Commercial Oil & Gas
    - Commercial Utilities
    - Temporary
    - Miscellaneous
  - Digital Signatures
    - Potential to use Adobe, DocuSign, or Unity Form
  - MM109 Conversion
    - Output as PDF (Image Form)
5. Budgetary estimate includes the following tasks for testing:
    - Unit testing
    - Create test scripts for User Acceptance Testing (UAT)
    - User Acceptance Testing (UAT) Support
  6. Budgetary estimate includes the following tasks for training:
    - Create training materials
    - UAT training for super users
    - End user training
  7. Budgetary estimate includes the following tasks for production deployment:
    - Migration of the solution to the Production environment
    - Go-live support
    - Create system information document
  8. Budgetary estimate includes the following tasks for project management:
    - Setup the project in the internal PSA system
    - Coordinate DataBank technical team personnel and schedules
    - Manage the project budget and invoicing
    - DataBank will schedule a project kick-off meeting to introduce project resources and review the project plan with Client
    - Ongoing planning and coordination
    - Lead weekly status meetings with the project team
    - Preparation of weekly status reports
    - Status reporting to Client Project Manager
    - Project Plan management





# EXHIBIT A - PRICING PAGE

v2.5.73.22

Content Management Software and Professional Services								
LOCATION: BUILDING 5, ROOM A-720, CHARLESTON, WV 25305								
Contract Item Number	Description	Unit of Measure	Estimated Quantity*	Unit Cost				Extended Cost
				Year One	Optional - Year Two	Optional - Year Three	Optional - Year Four	
4.1.5	Hyland OnBase Integration for WVDOT DocuSign eSignature Part # ONB-INTG1-11 or equal	EA		\$4,594.46	\$4,594.46	\$4,594.46	\$4,594.46	
4.1.6	Hyland OnBase Integration for WVDOT ESRI ArcGIS Server Part # ONB-INTG1-14 or equal	EA		\$4,594.46	\$4,594.46	\$4,594.46	\$4,594.46	
4.1.7.1.2.1	Advanced Capture Consultant - Professional Services	EA		\$210.00	\$210.00	\$210.00	\$210.00	
4.1.7.1.2.2	Business Consultant - Professional Services	EA		\$210.00	\$210.00	\$210.00	\$210.00	
4.1.7.1.2.3	Conversion Consultant - Professional Services	EA		\$210.00	\$210.00	\$210.00	\$210.00	
4.1.7.1.2.4	Database Engineer - Professional Services	EA		\$210.00	\$210.00	\$210.00	\$210.00	
4.1.7.1.2.5	Enterprise Solutions Consultant - Professional Services	EA		\$0.00	\$0.00	\$0.00	\$0.00	
4.1.7.1.2.6	Infrastructure Analyst - Professional Services	EA		\$210.00	\$210.00	\$210.00	\$210.00	
4.1.7.1.2.7	Integration Engineer - Professional Services	EA		\$210.00	\$210.00	\$210.00	\$210.00	
4.1.7.1.2.8	Principal Consultant - Professional Services	EA		\$0.00	\$0.00	\$0.00	\$0.00	



# EXHIBIT A - PRICING PAGE

v25.23.22

Content Management Software and Professional Services  
LOCATION: BUILDING 5, ROOM A-720, CHARLESTON, WV 25305

Contract Item Number	Description	Unit of Measure	Estimated Quantity*	Unit Cost				Extended Cost
				Year One	Optional - Year Two	Optional - Year Three	Optional - Year Four	
4.1.7.1.2.9	Program Manager - Professional Services	EA		\$210.00	\$210.00	\$210.00	\$210.00	
4.1.7.1.2.10	Technical Consultant - Professional Services	EA		\$210.00	\$210.00	\$210.00	\$210.00	
4.1.7.1.2.11	Hyland OnBase System Administrator Training or equal	EA		\$2,720.40	\$2,720.40	\$2,720.40	\$2,720.40	
4.1.7.1.2.12	Hyland OnBase Introduction to Workflow Training or equal	EA		\$2,740.00	\$2,740.00	\$2,740.00	\$2,740.00	
4.1.7.1.2.13	Hyland OnBase Premium Subscription or equal (Pricing should be based on 25 Essential User Licenses)	LS		\$604.53	\$604.53	\$604.53	\$604.53	

\* The estimated purchase volume for new licenses represents the approximate volume of anticipated purchases only.  
No future use of the Contract or any individual item is guaranteed or implied.

\*\* TRAVEL: Vendor shall be responsible for all mileage and travel costs, including travel time, associated with performance of this Contract.  
Any anticipated mileage or travel costs may be included in the flat fee or hourly rate listed on Vendor's bid, but such costs will not be paid by the Agency separately.

\*\*\*Optional Renewals- Year Two through Year Four may be renewed by Change Order upon mutual agreement between the Vendor and Agency.

Glenn Walther  
DataBank IMX

Vendor Signature



State of West Virginia  
Purchasing Division

# Blanket Release Order

Release # <b>81230102</b>	Req. Date <b>03/06/23</b>	Buyer	PURCHASING DIVISION'S USE ONLY
WVFIMS Account #			
Agency/Invoice To: WVDOT Information Technology Division ATTN: John Toomey 1900 Kanawha Blvd. E. Building 5, Room 730 Charleston, WV 25305 304-352-0540		TEAM Code _____	
Ship To: WVDOT Information Technology Division ATTN: John Toomey 1900 Kanawha Blvd. E. Building 5, Room 730 Charleston, WV 25305 304-352-0540		TEAM Code _____	
Vendor Name & Address:  DATABANK IMX LLC 458 PIKE RD HUNTINGTON VALLEY PA 19006			
WVFIMS Vendor # 000000161706		Team Vendor #	
BPO #	Terms	F.O.B.	

Item No.	Quantity	Description	Unit Price	Amount
		<u>CMA DOT23*3</u> Statewide or Agency Blanket Purchase Order Number		
001	229	Business Consultant - Professional Services	\$210.00	\$48,090.00
002	891	Database Engineer - Professional Services	\$210.00	\$187,110.00
003	223	Program Manager - Professional Services	\$210.00	\$ 46,830.00

Authorized  
Signature

*Humeini & Elk Rama*

Total Amount

**\$282,030.00**

Title

**CTO**

Original: Vendor

Copy: Purchasing Division

Telephone

**304 - 414-6911**






STATE OF WEST VIRGINIA  
DEPARTMENT OF ADMINISTRATION  
OFFICE OF TECHNOLOGY  
State Capitol  
Charleston, West Virginia 25305

Mark D. Scott  
Cabinet Secretary

Joshua D. Spence  
Chief Information Officer

**MEMORANDUM**

**TO:** John Toomey, Highways Division Manager II  
Department of Transportation

**FROM:** Joshua D. Spence, Chief Information Officer  
Office of Technology 

**SUBJECT:** INFORMATION TECHNOLOGY PROCUREMENT  
81220078 IS&C NUMBER: 2022-2049

**DATE:** April 21, 2022

West Virginia Code §5A-6-4(a)(3) permits the Chief Technology Officer to "evaluate the economic justification, system design and suitability of information equipment and related services, and review and make recommendations on the purchase, lease or acquisition of information equipment and contracts for related services by the state spending units."

West Virginia Code §5A-6-4c requires that the Chief Technology Officer review and approve "a major information technology project."

West Virginia Code §5A-6-5 requires that "any state spending unit that pursues an information technology purchase that does not meet the definition of a 'major technology project' and that is required to submit a request for proposal to the State Purchasing Division prior to purchasing goods or services shall obtain the approval of the Chief Technology Officer, in writing, of any proposed purchase of goods or services related to its information technology and telecommunication systems."



After conducting a review of your request for open-ended Content Management System RFQ for Hyland OnBase or equal, the Office of Technology has determined:

**X** That your request is approved.

That your request is not subject to the review and approval provisions contained in Chapter 5A, Article 6 of the Code, therefore, it does not need approval by the Office of Technology.

This memorandum constitutes this office's official review and a copy should be attached to your purchase order and any other correspondence related to this request.

If you have questions, or need additional information, please contact Consulting Services at [Consulting.Services@wv.gov](mailto:Consulting.Services@wv.gov).