

# EDGE STATEMENT OF WORK FOR DATA MIGRATION FROM CUSTOM LEGACY SYSTEM

This online Statement of Work (“SOW”) defines the goals, scope, and other important details supporting the delivery of Hyland Professional Services to Customer for one (1) or more projects related to the Edge Software standard services offerings. The offerings to be delivered will be designated and agreed upon between Hyland and Customer within an executed Order Form.

## PROJECT AREAS

### Data Migration

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#### Scope

Hyland will provide Professional Services to migrate documents and metadata from Customer’s legacy immigration case storage solution (“Legacy System”) into the Edge Immigration Case Management Solution (“Edge”) as specified in an executed Order Form.

Scope includes conversion from one (1) instance of the Legacy System. The scope of this service will be to convert and migrate customer’s historical immigration case management data and stored documents (if applicable) from a proprietary immigration forms or case management software program. Within the limitations of the data structure present in the supplied data file, Hyland will migrate the usable data from this file into Edge for a one-time charge per data file as indicated on an applicable Order Form.

As part of the Custom Data Migration engagement(s), Hyland will perform the following:

1. Provide project management services to collaborate on the creation of a detailed project plan with the Customer in order to drive project schedule, milestones and coordinate transition to new environment;
2. Perform in-depth requirements analysis to determine document metadata mappings, tactical planning, and establish respective roles;
3. Deliver a Requirements Document (“RD”) based on the requirements analysis, which will outline the documents and document metadata to be migrated, the extraction formats related to mapping of converted content, and the conversion methodology;
4. Configure document type and keyword mappings between Edge and the Legacy System according to the RD;
5. Configure migration import processes based on document type and keyword mappings between Edge and the Legacy System;
6. Perform Demonstration (Demo) to illustrate how the data will appear post data migration;
  - A. In the event the staged data does not meet the migration requirements as documented within the mutually agreed upon RD, Hyland will determine if a second iteration of the demo is required; and
  - B. In the event the Customer requests changes to the data migration requirements subsequent to mutual agreement on the requirements;
    - i. Additional demos will be performed at Hyland’s discretion;

- ii. Any additional Customer request(s) for demo will require an additional fee of \$2,000 per reiteration, to be applied through an approved Change Order executed via the standard Change Order process.
7. Convert single final export of Legacy System files and metadata into the Edge production system.

## Assumptions

1. Document Migration includes up to the number of data sets indicated on the applicable Order Form;
2. Legacy System contains a folder structure that typically defines both document types and metadata that will be used as keywords in Edge:
  - A. Only the first three (3) levels of the hierarchy will be considered in scope for such mapping.
3. The linkage between the metadata in the Legacy System databases and the physical files representing the pages of each document are identifiable within each Legacy System database;
4. Legacy System is hosted by a third-party vendor ("Vendor");
5. Customer will be responsible for coordinating and completing the extraction of Legacy System metadata and documents with Vendor;
6. Customer will be responsible for the delivery to Hyland of Legacy System document files and metadata:
  - A. Legacy System document files and metadata will be provided in an Excel, SQL, Immigrant Pro, or other industry-standard format;
  - B. The entire dataset will be provided along with any necessary foreign key linking relationships; and
  - C. No proprietary file types will be accepted.
7. Format of extracted Legacy System files will be natively supported by Edge such that no file format alterations will be required;
8. The production conversion will be performed in a single phase, as defined in the project plan, comprised of one (1) Bulk Load of documents;
  - A. All case data must be loaded.
9. Notwithstanding the above, migrated data is accepted on an "as-is" and "as-submitted" basis and subject to Customer User entry errors. Customer retains full responsibility for ensuring that data migration is accurate and correct. Data migration is limited to key fields as identified for each specific migration option and specific data on forms is not transferred in form-specific structure but is instead propagated to the central relational database that underlies Edge. As such, these migrated pieces of data are subject to verification by Customer and should not be relied upon prior to verification by Customer.

## Exclusions

The following items are considered out of scope for this engagement:

1. Data cleanup during the migration;
2. Access to the Edge system during data migration demo to validate and/or verify what has been imported;
3. Hardware support;
4. Operating support;
5. Web browser support;

6. Custom report creation;
7. General systems management;
8. Data validation or cleanup;
9. Verification or correction of errors that result from Customer data entry or procedural errors;
10. On or offsite training; and
11. Other services more properly covered under a separate engagement at the applicable hourly rate.

## Deliverables

<b>Deliverable</b>
Requirements Document
Migration Project Closure Information

## DELIVERABLE DESCRIPTIONS

The following table provides an overview of the Hyland project deliverables. Please reference the specific Project Areas for a listing of the applicable deliverables.

<b>Deliverable</b>
<b>Project Schedule</b>
Delivered within the initiation phase; and
Defines the major milestones and deliverables with corresponding planned completion dates.
<b>Requirements Document (RD)</b>
Composed as a result of a completed migration discovery; describes detailed functional requirements for the migration conversion project;
Includes mapping exceptions; and
Upon approval by Customer Project Manager and Sponsor the project will move to the Test Migration.
<b>Data Migration Demo</b>
Initial backup loaded into Edge.
<b>Production Import</b>
Detailed plan for the production conversion;
Customer-provided final backup; and
Includes activities, owners, and dates/timing as well as change control procedures and key dependencies.
<b>Migration Project Closure Information</b>
Signifies completion of activity on the migration project.

## KEY ASSUMPTIONS

The following are key assumptions that impact the success of the Professional Services, and are applicable to all Project Areas unless otherwise noted:

## General

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1. Hyland will provision and maintain the Edge non-production and production environments required for the solution(s) defined herein within the Amazon Web Services data center hosting the solution;
  - a. The hosted Edge environment(s) will leverage the latest version of Edge.
2. Project start date(s) are subject to a mutually agreed upon schedule after execution of an applicable Order Form;
3. Professional Services will be delivered utilizing Hyland's standard implementation methodology;
4. Professional Services will be provided remotely from Hyland offices;
5. When providing remote services, Hyland and Customer will discuss generally acceptable working hours and take into consideration time zone differences. Issues deemed as non-critical will only be addressed during normal business hours.
6. Upon mutual agreement between Hyland and Customer, the Requirements Document (RD) replaces any previous form of scope or solution proposal and becomes the then current project scope. Any changes to the scope per the RD may require review and re-estimation of the work effort, timeline, and pricing to deliver, and, based on such review and re-estimation, Hyland will determine whether the Project Change Control Process is required;
7. Each project is intended to be implemented in a timeframe of contiguous weeks. Scheduling delays that impact the project timeline will result in changes to project costs;
8. Each deliverable created will use Hyland's standard deliverable templates. Customer requested changes to deliverable templates may increase project costs or introduce timeline delays; and
9. After execution of an Order Form, all changes to the services will be processed with an authorized change order unless otherwise agreed to in writing by both Hyland and Customer.

## Migration-Specific

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1. Hyland will not be responsible for:
  - A. Verifying the correctness or integrity of document metadata, or the quality of image files associated with the Legacy System; or
  - B. Enhancing or modifying such documents or document metadata, (e.g., rotating documents, enhancing image quality, or correcting metadata).

## CUSTOMER OBLIGATIONS

To facilitate Hyland's execution of the Professional Services, Customer agrees, at a minimum, to the following obligations. The parties acknowledge and agree that failure to meet the responsibilities noted will likely affect project duration, cost and/or quality in the execution and completion of Professional Services.

## General

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### Project Personnel

1. Customer will assign a project sponsor, who will be actively involved in the project(s) and is the final escalation point for all issues and decisions:
  - A. The project sponsor will also ensure that the appropriate Customer personnel are assigned and made available to execute the project(s) successfully.
2. Customer will assign a project manager, who will act as a single point of contact for the Hyland project team and whose responsibilities include, but are not limited to, the following:
  - A. Managing all customer obligations as defined herein; and
  - B. Coordinating all key departmental decision makers, technical experts, subject matter experts, end user representatives, third party software application resources and project sponsorship.
3. Customer will engage the appropriate business process owners to the project(s), as well as subject matter experts, who are thoroughly knowledgeable about the current business practices in their respective areas and who are capable of performing their assigned project roles:
  - A. Business process owners and subject matter experts will be required to attend and contribute to all project meetings to which they have been invited for the duration of the project(s).
4. Customer will make reasonable efforts to maintain consistent resources throughout the project(s):
  - A. Any anticipated changes to the core team must be communicated in writing within five (5) business days unless termination or illness is the result of the change.

### Project Management

1. Customer will review all deliverables in accordance with the agreed upon plan. Failure to respond where needed within the designated timelines may result in project delays, loss of resources, and incorporation of the Project Change Control Process; and
2. Customer will execute timely decision-making, completion of all deliverables and action items and resolution of issues throughout the course of the project(s).

## Migration Specific

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1. Sign-off on the Project Charter that outlines the scope, objectives, critical success factors, assumptions and constraints of the project;
2. Identify document type and keyword mappings between the Legacy System and Edge;
3. Provide written Go / No-Go decision within the time period defined in the mutually agreed upon project plan to initiate the production migration;
4. Identify cutoff dates for the final production migration of static documents and metadata in Legacy System application;
5. Review and provide confirmation of closure of project; and
6. Report any errors during the warranty period as defined:
  - A. An error is defined as a defect in migration code that causes migrated documents or case data not to meet requirements;
  - B. New or changed requirements after the conversion is complete will be scoped as a new services engagement;

- C. After the warranty period, any errors, new requirements, or changed requirements will be scoped as a new services engagement.

## CHANGE ORDER PROCESS

Requested changes to this SOW will be managed using the Project Change Control Process outlined below.

If any party believes that a change to an executed Order Form is warranted, the party shall issue a Change Request in writing via electronic mail. The Hyland and Customer project teams will review the Change Request, determine the impact and attempt to agree to the change(s). Once the change(s) are agreed upon, Hyland will provide a formal Change Order to Customer outlining the change in Professional Services, the impact on hours, resources, timeline and/or cost.

Customer and Hyland will fully execute each mutually agreed upon Change Order prior to the requested changes taking effect. Customer and Hyland acknowledge that this may affect Professional Services, timelines and deliverables, and therefore will make reasonable efforts to execute any changes to this SOW with enough lead-time to minimize the influence on the project. No Change Order is binding upon the parties until it is executed by both Customer and Hyland.

## PRICING

The pricing set forth in the executed Order Form referencing this SOW was created using the following assumptions:

1. The above cost includes estimated Professional Services fees anticipated to complete the project(s) successfully; and
2. The fixed fee was determined based on information provided to Hyland by Customer and assumptions developed by the parties based upon that information. In the event that (a) any such information is inaccurate or necessary information was not provided to Hyland, (b) Customer fails to fulfill its obligations set forth above, or (c) reasonably unforeseen technical or system limitations exist or arise, and any of such causes materially and adversely affect the performance of the Professional Services, this fixed fee shall be adjusted equitably to reflect the impacts of such circumstances following the Project Change Control Process.