

# EDGE IMPLEMENTATION SERVICES STATEMENT OF WORK

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

### Edge Implementation

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Hyland offers a range of implementation services in connection with Customer's use of the Edge Immigration Case Management Solution ("Edge"). Customer may choose a Tier 1 or Tier 2 implementation as set forth in an executed Order Form.

- A Tier 1 implementation consists of a turn-key solution that requires minimal configuration by Hyland.
- A Tier 2 implementation provides custom immigration process type bundles and predefined reminders.

### Edge Implementation (Tier 1, Turn-key)

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#### Scope

If Customer selects Implementation Tier 1 in an applicable Order Form, Hyland will provide the following Professional Services to Customer to implement Edge. The implementation will focus on initial administrative setup of the Software as well as user configuration and privilege assignments.

As part of implementation, Hyland will set up:

1. The base Edge system with the following pre-defined best-practice settings and assets:
  - A. Approximately fifty-five (55) immigration process types with pre-configured default forms, required documents, questionnaires, and activities;
  - B. Approximately twenty (20) sample reports for firm metrics, case status, client expirations, and error-checking;
  - C. Approximately ten (10) pre-configured reminders (email and dashboard) for client status expirations; and
  - D. One (1) user dashboard with twelve (12) pre-configured widgets for monitoring workloads, active cases, case/consultation trends, upcoming tasks, calendars, and reports.
2. Customer-level data points used for form population, including:
  - A. Organization name;
  - B. EIN;
  - C. Address; and
  - D. Phone number.

3. A “Division” feature for multi-office/team organizations;
4. All desired user accounts according to best practice user settings, including:
  - A. Attorney/DOJ representative data for forms.
5. Customer logo for display on client portals.

## Assumptions

This scope is based upon the below assumptions being true. If for some reason these assumptions prove to be false, this could result in a scope change and may have an impact on the cost and timeline to deliver:

1. Hyland will provide up to sixteen (16) hours to implement the base solution, and up to sixteen (16) hours of additional consulting/support for project status calls and all methodology-related activities required to enable the solution to go live; and
2. Customer will provide the necessary information required for the implementation including but not limited to Customer-specific data values for forms, multi-office needs, user accounts, and logo.

## Exclusions

The following items are considered out of scope:

1. Additions or customizations to the pre-configured solution, including the following:
  - A. Database fields;
  - B. Process types;
  - C. Email or document templates;
  - D. Questionnaires;
  - E. Reports; and
  - F. Reminders.

## Deliverables

Deliverables
Software Solution

## Edge Implementation (Tier 2, Partial Customization)

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### Scope

If Customer selects Implementation Tier 2 in an applicable Order Form, Hyland will provide Professional Services to Customer to implement Edge. The implementation will focus on initial administrative setup of the Software, user configuration and privilege assignments, and customization of various components as listed below.

As part of implementation, Hyland will:

1. Setup the base Edge system with the following pre-defined best-practice settings and assets:
  - A. Approximately fifty-five (55) immigration process types with pre-configured default forms, required documents, questionnaires, and activities;
  - B. Approximately twenty (20) sample reports for firm metrics, case status, client expirations, and error-checking;
  - C. Approximately ten (10) pre-configured reminders (email and dashboard) for client status expirations; and
  - D. One (1) user dashboard with twelve (12) pre-configured widgets for monitoring workloads, active cases, case/consultation trends, upcoming tasks, calendars, and reports.
2. Configure up to one hundred (100) custom immigration process types, with the following related process defaults:
  - A. Forms;
  - B. Required documents;
  - C. Questionnaires; and
  - D. Activities.
3. Set up Customer-level data points used for form population, including:
  - A. Organization name;
  - B. EIN;
  - C. Address; and
  - D. Phone number.
4. Customize pre-defined reminders, including:
  - A. Enabling/disabling pre-defined reminder types for specific status types; and
  - B. Configuring custom lead time settings for pre-defined reminder types.
5. Set up a "Division" feature for multi-office/team organizations;
6. Set up all desired user accounts according to best practice user settings, including:
  - A. Attorney/DOJ representative data for forms.
7. Setup Customer logo for display on client portals.

### Assumptions

This scope is based upon the below assumptions being true. If for some reason these assumptions prove to be false, this could result in a scope change and may have an impact on the cost and timeline to deliver:

1. Hyland will provide up to sixteen (16) hours to implement the base solution, and up to thirty two (32) hours of additional consulting/support for the solution customizations, project status calls, and all methodology-related activities required to enable the solution to go live; and

2. Customer will provide the necessary information required for the implementation including but not limited to Customer-specific immigration process types, data values for forms, reminder adjustments, multi-office needs, user accounts, and logo.

## Exclusions

The following items are considered out of scope:

1. Additions or customizations to pre-configured solution beyond those listed in scope, including the following:
  - A. Database fields;
  - B. Email or document templates;
  - C. Questionnaires;
  - D. Reports; and
  - E. Reminder types.

## Deliverables

Deliverables
Project Plan
Software Solution

## Single Sign-On for Edge

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### Scope

Hyland will provide Professional Services to Customer to implement single sign-on (SSO) to automate the sending of information from Customer's identity management application (IdP system) to the Edge Software as set forth in an executed Order Form.

As part of the services, Hyland will:

1. Configure Service Provider initiated (preferred) or Identify Provider initiated SSO; and
2. Upload NameID identifiers to user records.

### Assumptions

This scope is based upon the below assumptions being true. If for some reason these assumptions prove to be false, this could result in a scope change and may have an impact on the cost and timeline to deliver:

1. Hyland will provide up to eight (8) hours to implement the integration;
2. Software will integrate with one (1) IdP system as the SSO data source;
3. Customer will perform all configuration required within the IdP system;
4. SAML assertions will conform to the SAML 2.0 standard;
5. SAML assertions will include a unique identifier (i.e., NameID) for each user;
6. Customer will provide SAML-compliant metadata;
7. SSO login URL will be unique to Edge account; and
8. Customer will perform ongoing user management post go-live. User management may be handled by a data feed managed by Customer.

### Exclusions

The following items are considered out of scope:

1. Configuration by Hyland within Customer's IdP system;
2. Non-SAML compliant SSO;
3. Post-implementation user record management by Hyland; and
4. Custom programming.

### Deliverables

Deliverables
Solution Design Document

## Web Services Integration for Edge

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### Scope

Hyland will provide Professional Services to Customer to support implementation of web services integrations to share information between Customer's third party system and the Edge Software as set forth in an executed Order Form.

As part of the services, Hyland will setup REST API integrations to include the following endpoints:

1. FNL;
2. Company Contact;
3. Visa;
4. Activities;
5. Reminders;
6. Job; and
7. Passport.

### Assumptions

This scope is based upon the below assumptions being true. If for some reason these assumptions prove to be false, this could result in a scope change and may have an impact on the cost and timeline to deliver:

1. Hyland will provide up to twenty (20) hours of consulting services to advise Customer in implementing the integrations;
2. Customer will configure/build the integrations to call the REST API endpoints;
3. Software will integrate with one (1) Customer third-party system;
4. Data sharing will occur in a one (1) way direction (i.e., either to or from Software) for each endpoint;
5. Hyland will provide API credentials (OAuth) for the non-production and production environments;
6. API requests and responses will conform to the specifications provided by Hyland;
7. Customer will ensure the integrity and accuracy of the integrated data; and
8. Customer will regularly monitor API responses for errors and repair any as needed on an ongoing basis.

### Exclusions

The following items are considered out of scope:

1. Configuration by Hyland within Customer's third-party system or API client;
2. Use of any web services protocol other than REST;
3. Use of insecure methods for transmitting data;
4. Post-implementation monitoring of the integrations by Hyland; and
5. Custom programming.

### Deliverables

Deliverables
Solution Design Document

## Acuity Integration for Edge

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### Scope

Hyland will provide Professional Services to Customer to implement an integration to enable the bi-directional sharing of foreign national client appointment information between Customer's Acuity and Edge calendars (refer to [Section 2 Supplemental Terms of Service Acuity Integration with Edge](#)) as set forth in an executed Order Form.

### Assumptions

This scope is based upon the below assumptions being true. If for some reason these assumptions prove to be false, this could result in a scope change and may have an impact on the cost and timeline to deliver:

1. Hyland will provide up to four (4) hours to implement the integration;
2. Customer will perform all configuration required within Acuity;
3. Hyland will connect up to ten (10) Acuity calendars to respective Edge users;
4. Customer will connect any additional Acuity calendars to respective Edge users;
5. Integration requires a one-to-one relationship between one (1) Acuity calendar and one (1) Edge user; and
6. Multiple Acuity calendars cannot be mapped to either the Edge Master Calendar or a single Edge user.

### Exclusions

The following items are considered out of scope:

1. Configuration by Hyland within Customer's Acuity system;
2. Custom programming; and
3. Training.

### Deliverables

Deliverables
Solution Design Document

## Edge Training

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### Scope

Hyland will provide Professional Services to train Customer administrators and end users on the Edge Software. Training will be delivered via remote webinar sessions and/or onsite in a classroom, as agreed upon between Hyland and Customer within an executed Order Form.

### Assumptions

This scope is based upon the below assumptions being true. If for some reason these assumptions prove to be false, this could result in a scope change and may have an impact on the cost and timeline to deliver:

1. Customer will secure training resources and a training room (if onsite) and ensure that all users participating will have the proper workstations and/or materials, as set forth by the Hyland project team. If these provisions are not met, Hyland has the right to cancel and reschedule training;
2. In the event of webinar sessions, each will be up to ninety (90) minutes in duration; and
3. Upon written request and Hyland approval, Customer will have the right to record webinar sessions provided by Hyland and to use such recordings for internal training; provided, however, that Customer agrees to restrict access to Authorized Users only.

### Deliverables

Deliverables
Training Agenda



## 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.

Deliverable	Description
<b>Project Plan</b>	Defines the projected schedule of project events from initiation through closure. Includes the activities, deliverables, assignments and dates required to complete the project.
<b>Solution Design Document (SDD)</b>	Central point of reference on how the solution functions. Outlines and defines important details about the solution functionality and configuration.
<b>Software Solution</b>	The Software configuration delivered at the conclusion of the Project. Implementation of the solution as described in scope and any related Solution Design Document(s).
<b>Training Agenda</b>	Defines the training schedule. Includes the necessary information to support delivery and completion of training.

## KEY ASSUMPTIONS

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

1. Services start date is subject to a mutually agreed upon schedule after execution of an Order Form;
2. Services are intended to be implemented in a timeframe of contiguous weeks;
3. Scheduling delays that impact the project timeline may result in delayed go-live and/or changes to project costs;
4. All services will be provided remotely, with the exception of training which can be provided onsite as agreed upon between Hyland and Customer within an executed Order Form;
5. 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. Software solution will be configured and go live in one (1) production environment, with the exception of integrations which will also be tested in one (1) non-production environment;
7. Go-live for implementation, integrations (if applicable), and data migration (if applicable) will occur simultaneously. Training will occur in close proximity to the first day of implementation go-live;
8. Customer is responsible for solution management post go-live including enhancements or customizations and user management;
9. Immediately following a go-live support period of two (2) weeks, Customer should contact Hyland Technical Support for all support inquiries;
10. Each deliverable created will use Hyland's standard deliverable templates; and
11. 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.

## 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

1. Customer will assign a project sponsor or manager, who will be the final escalation point for all decisions and issues;
2. Customer will designate a Software administrator who will actively participate in the project(s);
3. Customer will engage the appropriate business process owners or subject matter experts, who are knowledgeable about the current business practices and capable of contributing as needed;
4. Customer will provide vendor resources, interface specialists, technical experts, and/or subject matter experts deemed necessary for third party system(s) with which Software will integrate or from which content will be migrated;
5. Customer will make reasonable efforts to maintain consistent resources throughout the project(s);
6. Customer will create, maintain, and execute test plans and cases, as well as track and report testing results during the user testing period;
7. Customer will manage third party application setup (i.e. installation, configuration), testing, training, and go-live support related to any integration(s) with Software;
8. Customer will deploy Software on end user workstations for Microsoft Office add-ons (if applicable); and
9. Customer will execute timely decision-making, review of all Hyland deliverables, and completion of all Customer deliverables, action items, and resolution of issues throughout the course of the project(s). Untimely or non-response may result in project delays.

## CHANGE ORDER PROCESS

Requested changes to an executed Order Form 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. 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 Services Proposal 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.