



HARRISBURG AREA SCHOOL DISTRICT

STATEMENT OF *WORK*

ONBASE UPGRADE

AUGUST 24, 2026



DataBank
A KYOCERA GROUP COMPANY

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1.0 VERSION CONTROL

1.1 Document Attributes

Document Name	Statement of Work
Document Identifier	08192026 Harrisburg School District OnBase Upgrade_SOW
Publish Date	8/19/2026
Template Version Number	SOW-TemplateUpgradeOnPrem-v7-02142025
Version Number	0.2

1.2 Version History

Version Number	Date	Responsibility (Author)	Description
0.1	8/19/2026	Rick Billiet	Initial draft
0.2	8/24/2026	Brian Wienclaw	Removed Use & Disclosure and Revised General Terms and Conditions

1.3 RACI Chart

Name	Position	*	R	A	S	C	I
Bridget Dean	DataBank - Private Sector Practice Director	X		X	X		X
Jeff Eveland	DataBank – Vice President of Services			X	X		X
Rick Billiet	DataBank – Manager, Database & infrastructure				X		X
Mike Callen	DataBank - Director of Professional Services - Commercial				X		X
Brian Wienclaw	DataBank - Proposal Specialist		X				X
Brad Wright	DataBank - Account Manager				X		X
	Harrisburg School District - Project Sponsor	X				X	X
Column Key	* – Authorize: This individual has ultimate signing authority for any changes to the document and will be responsible for signing the Master Agreement R – Responsible: Person responsible for creating this document. A – Accountable: Person accountable for accuracy of this document. S – Supports: Individuals providing supporting services in the production of this document. C – Consulted: Individuals providing input (interviewee, etc.). I – Informed: Individuals who must be informed of any changes.						

1.4 End User Maintenance

Customer Number	21272
Maintenance Status	Full
Expiration Date	12/31/2026

2.0 INTRODUCTION

Hyland Software, Inc., manufacturer of OnBase, routinely releases new versions of the software. Each new version may contain new modules, new features in existing modules, corrections and/or enhancements to the software. DataBank strongly encourages their Customers to stay relatively current with the release schedule of OnBase. This benefits Customers in terms of maintenance, support, and overall user experience.

Harrisburg Area School District (hereinafter referred to as "Customer") is seeking to upgrade their current OnBase environments and is leveraging DataBank IMX, LLC, a Delaware Limited Liability Company (hereinafter referred to as "DataBank"), with its principal offices located at 458 Pike Road, Huntingdon Valley, PA 19006 to assist with the upgrade implementation.

3.0 OBJECTIVE

The objective of this document is to present the project scope, deliverables, assumptions, and professional service estimates for implementing the solution at Customer. It will also serve to solicit approval from Customer to move ahead with the described activities upon receipt of a signed copy.

4.0 UPGRADE PROJECT PLAN OVERVIEW

This Statement of Work outlines a project plan for an Incremental Parallel (IPUP) OnBase upgrade from version 20.3 to Current OnBase Release Build.

This project is to be performed remotely, using a remote screen-sharing application (Teams, Zoom, etc.).

Environments, servers and complex solutions to be covered under this project are:

PROD Environment
1 Database Server
2 App Servers

Certain OnBase modules pose particular considerations for OnBase projects. Modules licensed in the Customer environment include, but are not limited to:

- | | | |
|---|--|--|
| ☒ Workflow | ☐ WorkView | ☐ SSO/Identity Provider |
| ☐ Encrypted Keyword/Diskgroups | ☐ Autonomy IDOL | ☐ File Server/DDS |
| ☐ Mobile | ☐ Thick Client Processing | ☐ Other |

As part of this project, the OnBase database and/or component servers will be migrated to new hardware, or virtual hardware. This is a billable expense that is included in Time and Expenses estimates. Due to the number of servers and the complexity of architecture, a change order may be required if further complexity or unreported performance issues are discovered once the project begins.

As part of the pre upgrade analysis an assessment of custom components was conducted. The results are located within Appendix C

External Autofill Keyword Sets and Data Sets that use SQL Select string queries or VB Scripts are no longer recommended for use and may be removed in a future release. The rewrite \ replacement of these is out of scope for this project. The rewrite\replacement of these can be added as an additional billable expense.

Hyland has removed the Workflow functionality from the OnBase Thick Client as of version 23.1. Any end users currently using Thick client workflow will need to be transitioned to the Web or Unity client. Any back end processing will need to be moved to the Hyland Timer Service. As part of this project DataBank can install the



required modules. Depending on the level of complexity of the solution a change order may be required to set up the workflows to run using the new modules.

5.0 SCOPE OF SERVICES

The scope of this project consists of planning, discovery, development, testing, training, and deployment activities associated with the implementation of this project. Installation and/or configuration of OnBase components not listed or that exceed the documented numbers will require an approved change order.

The scope of this initiative will be limited to DataBank performing the following activities:

Activity	Description
Environmental Discovery and Project Initiation	• Outline roles and responsibilities between Customer and DataBank. • Discuss downtime (window when Customer cannot access OnBase). • DataBank will share User Acceptance Testing best practices and discuss Customer testing responsibilities as needed. • Determine target delivery date and rollout plan. • DataBank will survey Customer environment and document servers, processing locations, timers, and service paths. • DataBank will review all existing and/or new servers for compatibility and ensure they have necessary pre-requisites installed prior to install. • DataBank will analyze the existing OnBase software configuration and database settings. • DataBank to provide Customer with documentation on how to download necessary installer files from Hyland. Customer to download files.
Upgrade Production (Prod) Environment Implementation	• Customer is responsible for backing up the OnBase database. • DataBank will provide Customer with guidelines for server compatibility upon request. • Customer will provide servers as identified in Project Kickoff meeting, and is responsible for granting remote server access and necessary rights to the DataBank Engineer at the agreed upon time. • Server Migration to be implemented as part of IPUP process. • Upgrade project will include moving the OnBase database. • Customer assumes responsibility for all new server OS compatibility including target OnBase version prerequisites, unless otherwise stated in this document. Servers and DataBank access to servers must be available on the negotiated date or the project may be delayed. • DataBank will install destination version OnBase server components as determined in Environmental Readiness Assessment for In Place upgrades or on new servers if IPUP. • If moving the OnBase database to a new server, Customer holds responsibility to ensure that the database software is installed and for taking a full backup of the production database and moving the database to the new database server. DataBank will be responsible for updating database connections, and database pointers within OnBase. • Customer assumes responsibility for Third-Party applications hosted on these servers and their compatibility.



Activity	Description
	- Customer is responsible for backing up and moving the backup of the OnBase database where applicable. - Upgrade database and all component servers to target version. - DataBank will perform basic functionality testing of the Prod upgrade. Basic OnBase functionality testing shall be limited to user login, storage, and retrieval. - Customer will be required to conduct user acceptance testing with Customer Subject Matter Experts and sign off on the Prod environment upgrade. - Within 15 days after project hand-off, support of the system will be transitioned to DataBank Support.
Testing and Go-Live Support	- DataBank will provide post-upgrade support for unexpected software behavior or issues reported by Customer. - Any custom integration pieces should undergo User Acceptance Testing by Customer, and OnBase-side integration will be supported by DataBank. - If using the IPUP methodology, a Foundation version of OnBase and a Legacy version of OnBase will coexist for the duration of the project. To cut down on Go-Live Support costs and improve turnaround time, if unexpected behavior occurs in the Foundation version environment, Customer should verify all reported issues are not occurring in the Legacy environment prior to reporting the issue. - Customer is responsible for reporting & prioritizing unexpected behavior. - If issues are found with the software or upgraded environment result in a Software Change Request (SCR) from Hyland Software and Customer chooses to have DataBank upgrade the solution to a different fixed build, and this causes Go-Live Support to exceed the estimated hours, a Change Order for extra support time may be required.
Project Management	DataBank will own project management activities such as status meetings, budget reports, and change management.

The following items have been discussed but are considered out of scope for this project:

Activity	Description
Script Conversions	Following a pre-upgrade custom script check, it is assumed that there are no custom Scripts that need to be converted at this time. If Scripts are later identified and must be converted, a change order will be required.
Custom Development	Unity script updates
Electronic Form Rewrites	Following a pre-upgrade custom form check, it is assumed that there are no electronic forms that need to be rewritten at this time. If forms are identified and need to be rewritten, a change order will be required.



Activity	Description
Test Refresh	The refresh of the Test database is out of scope. This requires updating many OnBase pieces in the new Test instance and would require an 8 hour change order if this is later added.
User Acceptance Testing	- User Acceptance Testing is defined as the testing of unique processes configured by the Customer through the OnBase product. - To minimize DataBank's billable time, User Acceptance Testing is the responsibility of the Customer. - DataBank requires Customer involve their business subject matter experts and/or end users in functional testing.
Configuration of modules or components not currently installed	- OnBase solutions, configuration or components that are not currently installed will not be considered in scope for this project. - No additional new functionality will be considered part of the project. - Any requests for DataBank to change configuration of existing components will require an approved change order.
Workstation client software deployment	Customer is responsible for deploying OnBase client-side software, ODBC Data Sources, or other items to user workstations, unless explicitly stated in scope, or if an approved change order is processed.
OnBase Training	- Upgraded software may include new configuration options or updates to the user interface (UI). - Administrator or end user training is not considered in scope for any upgrade project. If training is required, Customer will work with their Account Manager in a separate service request.
Data Conversion	Work outlined in this SOW does not include data conversion from existing or legacy systems to OnBase. Out of scope items would include, but not limited to: data related to integration, content stored in other repositories, etc. If this is desired, an approved change order will be required.
Custom Interfaces	Standard OnBase interfaces will be leveraged for this project. Customized web front-ends, applications, or web services are not in scope and will require an approved change order.
Integrations	Application integrations with OnBase will require a change order.
Activities not listed	Activities not listed in the in scope statement will require a change order.

6.0 CRITERIA FOR PROJECT COMPLETION

DataBank defines upgrade project status as "Done"; that is, completed and ready for sign-off when the following statuses are present:

- All in scope installation activities have been completed
- All showstopper issues have been corrected or a viable workaround has been found
- Project will remain open for up to 15 (fifteen) days after the upgrade of the production system is complete. If after 15 days there are no open issues the project will be considered complete.

Note any non-showstopper issues with the software may be kept open with the upgrade technician when necessary.



Pursuing corrections for unexpected software behavior often requires installing a new build of OnBase for correction. Once the unexpected software behavior is corrected and scheduled for release the issue will be considered closed. Resolution will require installing a new build and that installation would require a change order.

7.0 COMPENSATION & PAYMENT SCHEDULE

DataBank will charge and bill services fees to Customer for the Professional Services provided under this Statement of Work (SOW) in the following manner:

1. Milestone or Fixed Bid project payments will be billed upon delivery or completion of the milestone.

All payments for subscription services or services outlined in this SOW must be made via Automated Clearing House (ACH) transfer. ACH transfers are required to facilitate timely and efficient payment processing. ACH transfers should be completed within thirty (30) days from the invoice date, unless otherwise agreed upon in writing by both parties.

8.0 PRICING BREAKDOWN

8.1 Professional Services Fees - Fixed Bid

The services rendered under this SOW will be delivered on a fixed fee basis. All Fixed Bid or Milestone projects will require a Project Initiation to commence. From that point forward, DataBank shall invoice Customer on completion or delivery of the following project related milestones. Travel and Expenses are outlined separately in the section below.

Milestone	Deliverables	Fixed Bid
Environmental Discovery and Project Initiation	- Project Kickoff - Project Plan - Release notes, documentation, download file info from Hyland Community	\$3,825.00
Upgrade PROD and Implementation	- Upgrade done on PROD Servers - Database schema updated - Project Sign-off	\$6,750.00
Production Deployment	Go-Live Support	\$2,925.00
Total		\$13,500.00

Note: Fixed cost project. Customer will be billed for the specific milestone amount upon completion of each milestone above. 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 Customer add a contingency reserve of 20% of total project estimate to account for change orders and additional requests.

8.2 Investment Summary

Description	Total
Professional Services	\$13,500.00
Estimated Total	\$13,500.00



9.0 DATABANK POLICIES

9.1 Travel & Expense Policy

Work is to be performed remotely. Any request of onsite work would require a Change Order.

9.2 Non-Standard Time Policy

Professional Services are considered non-standard time if they are performed outside of standard business hours in Customer's time zone. In certain circumstances, DataBank will perform work outside of normal business hours. DataBank will only charge a premium when Customer has requested that work be performed outside of standard business hours (see above for location and/or hours details). Premium rates are billed at 1.50 times the quoted services rate.

During non-standard business hours, on-call, standby, and availability time shall be billed at the standard quoted services rate until such time as the Customer engages the resource to perform services. Upon Customer engagement of the resource during non-standard business hours, all subsequent time associated with the engagement, including active service, on-call, standby, monitoring, and waiting time, shall be billed at 1.50 times the quoted services rate for the remainder of the period occurring outside of standard business hours. Any time incurred during standard business hours shall be billed at the standard quoted services rate.

9.3 Change Order Policy

Change Orders will be utilized for all scope changes not specifically stated in the in-scope section of this SOW, if the schedule changes from the defined schedule in this SOW, or Project Assumptions listed in this SOW are not met. This includes billable and non-billable project changes. Purchase Orders will be required for all mutually agreed upon billable changes. Any Change Orders that are agreed upon during the deployment phase can affect the project schedule. The Project Schedule will be updated and approved by Customer as part of the Change Order Process.

10.0 CUSTOMER RESPONSIBILITIES

Customer agrees that the following actions and project requirements will be solely owned and completed/provided by Customer staff and Customer resources. Failure to complete actions will directly impact the project start date, project schedule and project success. Any requirements or Customer responsibilities not provided during the project will result in a change order to account for increased project schedule, increased resource expenses, and increased operating expenses.

10.1 Required Prior to Project Start

DataBank resources will be assigned to the project and engaged in project activities beyond the initiation meeting once all of the following requirements have been met by the Customer.

1. Signed Statement of Work and Purchase Order, if required by Customer.
2. All applicable System Servers are installed, tested, and properly working
3. All applicable Operating Software is installed, tested, and working properly
4. A network account with rights to the network and hardware is set up and made available to DataBank for both onsite and remote work.
5. A work space will be made available for DataBank resources to perform the work described in this SOW. The space will be a physical space if work is performed on-site. The space will be remote machines if the work is performed remotely.
6. Customer will provide project staff with access to all printed and electronic information relevant to this project at the beginning of the project.



7. Customer will assign a Project Manager or Lead Resource to manage the day-to-day activities related to the project. This will include ongoing project planning, schedule coordination, and issue escalation in order to meet all milestones/requirements.

10.2 Required During Project

Customer will provide the following during the project.

1. Customer will maintain and keep available all line items listed as requirements prior to project start.
2. Customer will manage/schedule its own resources during the project.
3. Customer will test the deployed solution as defined within the Solution Design Document.
4. Customer will document all issues/change requests as part of the Customer testing process.

11.0 ASSUMPTIONS

11.1 Project Assumptions

The following Assumptions are paramount to the defined scope and schedule for this project. Any variables in the project found to not match the listed assumptions will be documented by DataBank Project Manager as a project risk. A change order will be required for any variables that do not match the Project Assumptions and that impact the project deliverables, project schedule or project expenses.

1. This quote and description of work is valid for 180 days following delivery of the Statement of Work to the Customer or the next OnBase long term release (LTR), whichever comes first. If work does not begin within that allotted period, a follow-up review of the system will be performed, and a Change Order for additional work may be required.
2. Recognizing that technology is a changing landscape in which changes to software (OS and browser updates, OnBase major versions, etc.) are outside the control of DataBank, changes in software may necessitate a change in the approach or requirements of an upgrade in order to preserve the functionality of the solution. This work may require a Change Order to bring Customer system in compliance with updated software.
3. DataBank resources will schedule a kickoff call within (2) weeks after both parties sign this SOW.
4. A schedule will be presented during the kickoff call and will be updated after discovery is complete. If Customer delays lead to gaps of more than (5) unplanned days, the currently assigned DataBank resources may be reassigned to other projects. If the currently assigned resources are reassigned to other projects, the costs associated with performing knowledge transfer to new resources will be the responsibility of Customer. The timing of project reinitiating with a new resource will be determined on the resources new project booking. Customer has the opportunity to pay a \$6,500.00 a week resource hold fee during delays to retain resources and keep project schedules on track which will be issued through a change order.
5. During Customer testing, the only issues that will be considered to be addressed are those that are not pre-existing issues and are upgrade-related.
6. DataBank will manage/schedule its own resources during the project.
7. Both parties will attend up to 1 project status meeting per week throughout the duration of the project. Attendance will be via remote conference call unless other requirements are agreed upon by both parties. Additional Project Status requirements are subject to applicable Project Management fees.
8. DataBank assumes no liability or responsibility for any changes made in the production environment that are not made by a DataBank employee.
9. After completion of the upgrade, it is possible that additional issues may be identified. For a period of 15 business days (about 3 calendar weeks), the DataBank project team will be available to provide support for issues falling within the upgrade project scope. After the 15th business day, post-upgrade support will transition to the DataBank Support teams to provide primary assistance.
10. This Agreement may be terminated with or without cause by either Party with not less than ninety (90) days prior written notice. The termination, effective upon the agreed termination date, shall result in the cessation of all work. Termination shall not relieve either Party of any obligation accrued prior to the termination date.



11. Software Manufacturers occasionally publish a schedule that indicates which versions or functionality is no longer supported or being phased into an end-of-life status. DataBank assumes that Customer is taking responsibility for monitoring such end-of-life, deprecation, or sunset schedules and taking necessary precautions. If DataBank encounters a condition in the course of its project work that requires action or modification to resolve such an issue, it may result in a change order.
12. DataBank resources will perform work unimpeded by Customer staff monitoring, shadowing, or Customer driven remote technology where DataBank resources are limited by Customer staff availability. A request to monitor/shadow DataBank resources, while welcomed, does impede resource efficiency which has a direct impact on the duration of the project and time needed to complete the project. A change order will be required to cover the increased project time that results from resource monitoring.
13. Formal Change Orders will be utilized for all scope changes not specifically stated in the in-scope section of this document. This includes billable and un-billable project changes. Purchase Orders will be required for all mutually agreed upon billable changes.
14. Any Change Orders that are agreed upon during the deployment phase can affect the project schedule. The Project Schedule will be updated and approved by Customer as part of the Change Order Process.
15. As part of the project there will be certain activities that are the responsibility of Customer. These activities will be outlined within the project plan and timeframes for these activities will be agreed upon by DataBank and Customer. Delays to these activities will extend the overall project timeline and increase the amount of time DataBank resources spend on the project, and may require a change order.
16. The current release build that the upgrade will target will be agreed upon by DataBank and Customer at the start of the project. Changing the agreed upon targeted version during the project, particularly a change in the major version, will result in additional time and effort and a Change Order may be required.

12.0 GENERAL TERMS AND CONDITIONS

The performance of the Services described in this Statement of Work ("SOW") by DataBank for the Customer is subject to and shall be governed by the following terms and conditions. If this SOW is made pursuant to a Master Services Agreement ("MSA"), the terms and conditions set forth in such MSA are incorporated herein by reference and made a part of this SOW.



13.0 ACCEPTANCE OF SOW

This SOW represents DataBank's offer to perform the project on the terms set forth herein; and this offer shall be accepted only upon Customer signing and delivering this SOW to DataBank within 90 days from the date of this document (the "Acceptance Deadline"). DataBank may withdraw this offer at any time prior to acceptance by Customer. In any event, this offer shall be void, and shall for all purposes be deemed to have been withdrawn by DataBank, if this offer is not accepted, in the manner provided above, by Customer on or before the Acceptance Deadline.

For purposes of this SOW, a signed copy delivered by facsimile or electronically shall be treated by the parties as an original of this SOW and shall be given the same force and effect.

IN WITNESS WHEREOF, and intending to be legally bound, the parties have executed this SOW as of the date(s) set forth with their respective signatures below.

DataBank IMX, LLC, a Delaware Limited
Liability Company

Company Name ("DataBank")

Harrisburg Area School District

Company Name ("Customer")

By (Signature)

By (Signature)

Printed Name and Title

___ / ___ / ___

Dated

Printed Name and Title

___ / ___ / ___

Dated

Billing Information

Billing Contact and Title

Billing Email Address

Billing Address

Billing City, State, Zip



APPENDIX A – UAT ACCEPTANCE FORM

- ☐ Customer acknowledges that User Acceptance Testing (UAT) is complete. No further solution changes will be required before the migration of the solution to the production environment.

Exceptions:

Comments/Reason:

Company Name ("Customer")

Project Sponsor Name (Print)

Project Sponsor Signature

Date



APPENDIX B - WORK ACCEPTANCE FORM

Date Submitted ____ / ____ / ____

Company: _____

Project Name _____

Deliverable/Milestone _____

Exceptions:

- ☐ Accept Deliverable
- ☐ Decline Deliverable

Comments/Reason:

Company Name ("Customer")

Project Sponsor Name (Print)

Project Sponsor Signature

Date



APPENDIX C – CUSTOM DEVELOPMENT ANALYSIS



Harrisburg School District Upgrade Analysis



Harrisburg School District Upgrade Analysis

Summary:

- Replace up to 21 SQL based af/ds (out of scope)

Details:

- 21 SQL based autofills (See attached spreadsheet for list)
 - 4 autofills are retired based on naming (out of scope)
- 4 SQL based datasets (See attached spreadsheet for list)

