



QAS Professional Services

Statement of Work

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1. Overview

The purpose of this Statement of Work (SOW) is to articulate the work to be undertaken by QAS Professional Services (QAS PS). The content of this document will also outline the requirements needed and expectations from QAS PS to deliver the service.

This document provides a framework for each 'service type' QAS PS offer. **Please only refer to relevant service(s) below.**

This Statement of Work applies to the QAS services listed in the table below.

Please click on service for its relevant details

Consultancy Services – section 2	Installation & Training Services – section 3	Non product services – section 4
QAS Pro Web	QAS Pro Plug & Go	Address Clean Bureau
QAS Pro On Demand	QAS Pro Server	NCOAS
QAS Pro API	QAS Batch Standalone	Match Bureau
QAS Batch API	MatchIT Plus	Data Audit
QAS For	MatchIT Pro	Solution Review
QAS For Salesforce.com	MatchIT Complete	Data build (AARF)
QAS Email		Data Build (GNAF)
MatchIT API		Data Analysis Workshop
		Email Bureau

2. Consultancy Services

2.1 Key Details

- i. QAS will provide integration assistance for developers to understand best practice and provide necessary support to complete the integration of QAS. QAS PS will not provide any hands on development
- ii. Integration assistance pertains to a single touch point, single environment and default functionality of QAS. If there is a requirement for non-standard functionality and multiple touch points this will require additional consultancy that is chargeable subject to feasibility
- iii. It is preferable that any work undertaken is within a development environment
- iv. Development will take place at onsite location of QAS customer or 3rd party developer
- v. QAS PS will attend a maximum of 2 onsite visits for any service within the Sydney, Melbourne, Canberra and Auckland metropolitan areas. Any service to be delivered outside these areas may be subject to travel expenses to be discussed prior to the purchase of the service. Any integration assistance beyond these onsite visits will be performed remotely until the deliverables (below) have been achieved
- vi. Any integration requirements outside the default touch points and functionality of 'QAS for' solutions may require assistance from the QAS escalations team based in the UK. Turn-

around time for this service is subject to QAS escalations availability and complexity of customisation – which may incur additional charge

- vii. Capture Training is limited to 8 users per session

2.2 Resources

- i. PC/Server(s) for QAS software installation
- ii. Access to person or team with administrator rights on the PC/server(s) affected by the installation
- iii. Developer of target application where QAS is being integrated
- iv. Any 3rd party or internal stakeholders to discuss scope of project and integration options
- v. If applicable, training room facilities including user access to UAT/Dev environment to enable “hands-on” training.

2.3 Deliverables

- i. Combination of onsite and remote knowledge transfer to allow developers to complete solution integration
- ii. Working integration of solution into a single environment (preferably development)
- iii. An accreditation document (‘Accreditation’ and ‘Premium’ services only)
- iv. Nominated users trained on functionality and best practice (‘Enhanced’ and ‘Premium’ services only)

2.4 Completion Criteria

- i. QAS integration is working in a single touch point within a single environment
 - a. A ‘working integration’ relates to QAS functionality within the core scope of the product and customer project
 - b. Any additional requirements outside of scope may require a new Statement of Work to be developed by QAS PS.
- ii. 5 working days has passed since the customer or their representative acknowledges the receipt of the Accreditation Documentation (‘Accreditation’ and ‘Premium’ services only).
- iii. Conclusion of the training session on the date agreed between customer and QAS PS (‘Enhanced’ and ‘Premium’ services only)
- iv. QAS PS will endeavour to contact customer soon after order has been processed. QAS PS will make additional attempts via phone and email to book the service if initial contact is not successful. The customer will forfeit the service after a period of 12 months if no contact has been returned.

3. Installation & Training Services

3.1 Key Details

- i. Installation and configuration is limited to a maximum 10 end users/machines and includes a single server installation if applicable
- ii. QAS PS will attend 1 onsite visit per service within the Sydney, Melbourne, Canberra and Auckland metropolitan areas. Any service to be delivered outside these areas may be subject to travel expenses to be discussed prior to the purchase of the service.
- iii. Webinar training will be conducted via an Online Conference (<http://www.webex.com>) and it is expected that the customer's internet security allows for Webex training
- iv. MatchIT webinar training includes a standard overview of product functionality and capabilities. This does not include a customised session targeted at specific requirements or data.
- v. MatchIT Onsite and Batch Onsite Training is limited to 3 users per session
- vi. Capture Onsite Training is limited to 8 users per session. Capture webinar training is limited to 3 users

3.2 Resources

- i. PC/Server(s) for QAS software installation and/or training
- ii. Access to person or team with administrator rights on the PC/servers affected by the installation
- iii. Any 3rd party or internal stakeholders to discuss scope of installation, configuration or training requirements
- iv. It is preferable (although not mandatory) for training room facilities to be available onsite at customer/training location. A projector is also preferable
- v. For Onsite Capture Training, it is preferred that users have access to UAT/Dev environment to ensure training session is as relevant as possible

3.3 Deliverables

- i. Users trained on functionality and best practice ('Training' and 'Premium' services only)
- ii. Working installation of product configured to custom requirements and environment ('Install and Config' and 'Premium' services only)

3.4 Completion Criteria

- i. Conclusion of the training session on the date agreed between customer and QAS PS ('Training' and 'Premium' services only)
- ii. 5 working days have passed since Installation and Configuration has been completed within scope for the relevant application. Any amendments to the scope after this time is subject to a new Statement of Work ('Install and Config' and 'Premium' services only)

- iii. The customer has confirmed Installation and Configuration is complete and correct ('Install and Config' and 'Premium' services only)
- iv. QAS PS will endeavour to contact customer soon after order has been processed. QAS PS will make additional attempts via phone and email to book the service if initial contact is not successful. The customer will forfeit the service after a period of 12 months if no contact has been returned.

4. Non product Services

4.1 Key Details and Deliverables

4.1.1 Address Clean Bureau

Address Clean Bureau Key Details

- i. QAS PS will process a single file through the Batch engine
- ii. Data provided to QAS PS should be in a Comma Separated Value file (*.csv) or Tab Delimited Text file (*.txt) and contain field headings
- iii. It is preferable that the address file is provided in the following format; "Address Lines", "Locality", "State", "Postcode", however QAS Batch can handle addresses in a variety of formats.
- iv. QAS PS will provide updated records for automatically matched records. QAS PS will not manually clean unmatched records
- v. All formatting, standardisation, cleaning and output requirements will be defined post sale between QAS PS and appropriate customer stakeholder
- vi. Data will be returned via FTP using 256-bit data encryption and require WinZip 9.0 or above to extract the files. Alternatively, the data can be supplied in CD-ROM format if required.
- vii. All work will be performed remotely from Experian offices

Address Clean Bureau Deliverables

- i. QAS PS will provide a cleansed address file as per the requirements document (defined after order has been processed)
- ii. Cleaning Summary Report (*.pdf)
- iii. Any other reports requested by customer

4.1.2 NCOAS

NCOAS Key Details

- i. QAS PS will process a single file through the NCOAS engine

- ii. Data provided to QAS PS should be in a Comma Separated Value file (*.csv) or Tab Delimited Text file (*.txt) and contain field headings
- iii. Data provided should contain the following fields; "Title", "First Name", "Surname", "Address Lines"
- iv. Data will be returned via FTP using 256-bit data encryption and require WinZip 9.0 or above to extract the files. Alternatively, the data can be supplied in CD-ROM format if required.
- v. All work will be performed remotely from Experian offices

NCOAS Deliverables

- i. NCOA statistics file
- ii. NCOA output file will contain the input name, address fields used for the NCOA matching process and output the corresponding NCOA fields; "NCOA_START_DATE", "NCOA_TO_DPID", "NCOA_ADDRESS", "NCOA_SUBURB", "NCOA_STATE", "NCOA_POSTCODE", "NCOA_NAME_MATCH_RATE", "NCOA_NAME_MATCH_LEVEL", "NCOA_MATCHED_NAMES", "NCOA_MSG"
- iii. Address format is output to a standard format as above. This is not customisable.

4.1.3 Match Bureau

Match Bureau Key Details

- i. QAS PS will process a single file through the matchIT engine
- ii. Data provided to QAS PS should be in a Comma Separated Value file (*.csv) or Tab Delimited Text file (*.txt) and contain field headings
- iii. Data provided should contain unique reference, consumer names (first and surname) and address information at a minimum. Additional fields can be provided however not mandatory.
- iv. QAS PS will utilise the default match keys and match weights for matching. See below:
 - a. Phonetic Surname Key & Initial + Postcode
 - b. Phonetic Surname Key + Phonetic Town/City Key
 - c. Phonetic Address Key (Town/City & Street)
- v. If bespoke matching settings are required, a new Statement of Work will need to be drawn up by QAS PS articulating these requirements
- vi. The minimum score to report on will be the default score of 80.
- vii. Data will be returned via FTP using 256-bit data encryption and require WinZip 9.0 or above to extract the files. Alternatively, the data can be supplied in CD-ROM format if required.
- viii. All work will be performed remotely from Experian offices

Match Bureau Deliverables

- i. Internal Matching Summary Report (*.pdf) – This will summarise the number of matching pairs, potential deletions, matches found, match keys used and an overview of matches found by score range
- ii. Matching Sets Report (*.csv) – This report will contain each report that is considered a duplicate from score 80 and above. It includes the input fields of the supplied file, as well as specific matchIT fields. These include: unique_ref, match_ref and set_dups

4.1.4 Data Audit

Data Audit Key Details

- i. QAS PS will analyse and report on address accuracy, potential duplicates and the percentage of change of address occurrences within a single database (where applicable)
- ii. QAS PS will also report on possible areas for improvement, address errors and trends and recommend a solution to resolve issues
- iii. Data will be processed through the QAS Batch engine, matchIT engine and NCOAS engine
- iv. Data should be provided to QAS in a Comma Separated Value file (*.csv) or Tab Delimited Text file (*.txt) and contain field headings
- v. QAS PS will utilise the default match keys and weights for the matching component. See below:
 - a. Phonetic Surname Key & Initial + Postcode
 - b. Phonetic Surname Key + Phonetic Town/City Key
 - c. Phonetic Address Key (Town/City & Street)
- vi. The minimum score to report on will be the default score of 80.
- vii. QAS PS will not provide any cleansed data back to the customer, ie. only reports will be provided
- viii. All work will be performed remotely from Experian offices

Data Audit Deliverables

- i. QAS PS will supply a data audit report (*.pdf) of the issues found
- ii. QAS PS will supply an implementation plan to resolve the issues found where possible

4.1.5 Solution Review

Solution Review Key Details

- i. QAS PS will review existing integration of QAS products and provide advice on modifications necessary to meet best practice

- ii. QAS PS will not modify/change integration, resolve existing issues or issues that are uncovered as a result of the review

Solution Review Deliverables

- i. A Solution Review report on the analysis of QAS solution. This includes data flow, details on integration of product, specific requirements, issues and processes.

4.1.6 Data Build (AARF)

Data Build (AARF) Key Details

- i. Experian will provide the Australian Address Reference File (AARF)
- ii. The AARF will not include non-street addresses such as PO Boxes, Locked Bags or Roadside Mail Boxes
- iii. DPIDs and Building names are excluded from the AARF
- iv. Data will be returned via FTP using 256-bit data encryption and require WinZip 9.0 or above to extract the files. Alternatively, the data can be supplied in CD-ROM format if required.
- v. All work will be performed remotely from Experian offices

Data Build (AARF) Deliverables

- i. The AARF will be supplied as a comma separated file (*.csv) with 7 fields of varying length (including field names). All character fields are left aligned and the postcode field is 4 characters and may have a leading zero.
- ii. The fields supplied are: AARF_Street, AARF_Suburb, AARF_State, AARF_Postcode, AARF_RES_IND (Residential flag), AARF_NONRES_IND (Non Residential flag) AARF_NAM_IND (No Advertising Material Indicator)
- iii. The above output is subject to availability of the AARF and assumes no changes to the format has occurred

4.1.7 Data Build (GNAF)

Data Build (GNAF) Key Details

- i. Experian will provide the RAW GNAF for all Australian States, including other territories (for example, Christmas Island)
- ii. Each state will be returned as a separate Comma Separate File (*.csv)
- iii. Data will be returned via FTP using 256-bit data encryption and require WinZip 9.0 or above to extract the files. Alternatively, the data can be supplied in CD-ROM format if required.
- iv. All work will be performed remotely from Experian offices

Data Build (GNAF) Deliverables

- i. Each Australian State file will contain the following field headings:

ADDRESS_DETAIL_PID, LEVEL_NUMBER_PREFIX, LEVEL_NUMBER, LEVEL_NUMBER_SUFFIX,
FLAT_NUMBER_PREFIX, FLAT_NUMBER, FLAT_NUMBER_SUFFIX,, LOT_NUMBER_PREFIX,
LOT_NUMBER, LOT_NUMBER_SUFFIX, NUMBER_FIRST_PREFIX, NUMBER_FIRST,
NUMBER_FIRST_SUFFIX, NUMBER_LAST_PREFIX, NUMBER_LAST, NUMBER_LAST_SUFFIX,
STREET_NAME, STREET_TYPE_CODE, STREET_SUFFIX_CODE, LOCALITY_NAME,
STATE_ABBREVIATION, PRIMARY_POSTCODE, CONFIDENCE, RELIABILITY_CODE,
BUILDING_NAME, LOCATION_DESCRIPTION, LEGAL_PARCEL_ID, PRIVATE_STREET,
PROPERTY_PID, FLAT_TYPE_CODE, LEVEL_TYPE_CODE, LOCALITY_PID,
LOCALITY_CLASS_CODE, BOUNDARY_EXTENT, DATE_CREATED, DATE_RETIRED, ELEVATION,
GEOCODE_SITE_DESCRIPTION, GEOCODE_SITE_NAME, GEOCODE_TYPE_CODE,
PLANIMETRIC_ACCURACY, LONGITUDE, LATITUDE

These attributes will be appended to each address record where applicable

- ii. Each file is returned as a Comma Separate File (*.csv) of varying field lengths

4.1.8 Data Analysis Workshop**Data Analysis Workshop Key Details**

- i. QAS PS will provide an onsite workshop to scope database schema and business requirements to determine optimal pre-processing and output requirements for an address bureau clean.
- ii. Data Analysis Workshop can only be conducted if Address Bureau Clean has been purchased by customer
- iii. Workshop will take place at onsite location of QAS customer or 3rd party stakeholder
- iv. QAS PS will attend 1 onsite visit within the Sydney, Melbourne and Auckland metropolitan area. Any service to be delivered outside these areas may be subject to travel expenses to be discussed prior to the purchase of the service.

Data Analysis Workshop Deliverables

- i. Onsite Data Analysis Workshop
- ii. Optimised Address Bureau Clean results

4.1.9 Email Bureau**Email Bureau Key Details**

- i. Email Data should be provided to QAS in a Comma Separated Value file (*.csv) or Tab Delimited Text file (*.txt)

- ii. Data will be returned via FTP using 256-bit data encryption and require WinZip 9.0 or above to extract the files. Alternatively, the data can be supplied in CD-ROM format if required.
- iii. All work will be performed remotely from Experian in conjunction with TowerData

Email Bureau Deliverables

- i. The input file will be returned with the following fields appended: Corrected_Email, Email_OK, Email_Status_Code, Email_Status_String, Email_Address, Username, Domain, Email_Validation_Level, Dupe_Flag
- ii. MxValid Report (*.xls)

4.2 Completion Criteria

- i. 5 working days have passed since the customer or their representative acknowledges the receipt of the output files or reports **OR**

The output files has been uploaded back into the customer's database or is being used in a live environment **OR**

The customer has confirmed that the output or report files are complete and correct
- ii. Conclusion of the workshop session on the date agreed between customer and QAS PS (Data Analysis Workshop only)
- iii. QAS PS will endeavour to contact customer soon after order has been processed. QAS PS will make additional attempts via phone and email to book the service if initial contact is not successful. The customer will forfeit the service after a period of 12 months if no contact has been returned