



**QAS Professional Services**

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## **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
<a href="#">QAS Pro Web</a>	<a href="#">QAS Pro Plug &amp; Go</a>	<a href="#">Address Clean Bureau</a>
<a href="#">QAS Pro On Demand</a>	<a href="#">QAS Pro Server</a>	<a href="#">NCOAS</a>
<a href="#">QAS Pro API</a>	<a href="#">QAS Batch Standalone</a>	<a href="#">Match Bureau</a>
<a href="#">QAS Batch API</a>	<a href="#">QAS Unify</a>	<a href="#">Data Audit</a>
<a href="#">QAS For</a>		<a href="#">Solution Review</a>
<a href="#">QAS For Salesforce.com</a>		<a href="#">Data build (AARF)</a>
<a href="#">QAS For MS Dynamics CRM 2011</a>		<a href="#">Data Build (PAF)</a>
<a href="#">QAS For Oracle On Demand</a>		<a href="#">Data Build (GNAF)</a>
<a href="#">QAS Email</a>		<a href="#">Data Analysis Workshop</a>
<a href="#">QAS Mobile</a>		<a href="#">Email Bureau</a>
		<a href="#">Mobile Bureau</a>
		<a href="#">Append Bureau</a>

## 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 3<sup>rd</sup> 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. QAS PS and service delivery will be available during Australian or New Zealand business hours. Australian and New Zealand business hours are 9:00 AM – 5:30 PM AEST/NZDT Monday to Friday, excluding public holidays.
- vii. 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
- viii. 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 3<sup>rd</sup> 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. Unify Onsite and Batch Onsite Training is limited to 3 users per session
- v. 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 3<sup>rd</sup> 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 QAS Unify 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 a unique reference, consumer names (forename and surname) and address information at a minimum. Additional fields can be provided however is not mandatory.
- iv. QAS PS will utilise the default Individual Match Scenario using Name + Address and score filtering of First Name > 85%, Last Name > 85% and Address > 85%. The score filters are used to determine what is considered a matching record.
- v. All other default match settings will be used
- vi. If bespoke matching settings are required, a new Statement of Work will need to be drawn up by QAS PS articulating these requirements
- 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. Cluster of duplicates report (\*.csv) – This report will contain all records that have been identified as a duplicate.

- ii. The fields supplied are: "Id" (Unify internal unique ID), "ClusterId" (ID linking duplicate records), "RecordId" (Customer unique ID), "TotalScore" (Matching Score), "Survivor" (Identifies most complete record)
- iii. Original input fields are not output by default. If this is required a new Statement of Work may be required

#### 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, Unify 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 Individual Match Scenario using Name + Address and score filtering of First Name > 85%, Last Name >85% and Address >85%. The score filters are used to determine what is considered a matching record.
- vi. All other default match settings will be used
- 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

- vi. 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.
- vii. 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)
- viii. The above output is subject to availability of the AARF and assumes no changes to the format has occurred

#### 4.1.7 Data Build (PAF)

##### Data Build (PAF) Key Details

- ix. Experian will provide the Australian PAF in a flat file. DPIDs are excluded.
- x. 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.
- xi. All work will be performed remotely from Experian offices

##### Data Build (PAF) Deliverables

- i. The PAF flat file will be supplied as a pipe separated file (\*.psv) 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. PAF flat file containing the following field headings:

Field	Example
BLDG_PROP_NAME	RAAF ASSOCIATION RETIREMENT VILLAGE
FLAT_UNIT	U 24 or 134

FLOOR	L 1
LOT	31
PO_BOX	PO Box 12
STREET	TYLER ST
LOCALITY_NAME	FINGAL BAY
STATE	ACT
POSTCODE	2315

- iii. The above output is subject to availability of the PAF and assumes no changes to the format has occurred

#### 4.1.8 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. The file will be returned as a separate as a Pipe Delimited File (\*.psv)
- iii. The G-NAF dataset is not supplied with Postcode data for individual records. Experian will supplement postcode data through an internal PID to Postcode reference file. It is expected this process can append up to 95% of postcodes across the G-NAF dataset.
- iv. No change in availability or format of the GNAF occurs. If this takes place the Statement of Work will need to be reviewed.
- v. No changes in the availability of the PID to Postcode lookup file for Postcode appending. If this takes place the Statement of Work will need to be reviewed
- 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

##### Data Build (GNAF) Deliverables

- i. The GNAF flat file will be supplied as a pipe separated file (\*.psv) 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.

GNAF flat file containing the following field headings:

Field	Example
ADDRESS_DETAIL_PID	GAACT714845933
BUILDING_NAME	CANBERRA COLLEGE WODEN
FLAT	UNIT 10
LEVEL	FL 12
LOT	45
NUMBER	53 or 53-55
STREET	BAYLIS PLACE N
LOCALITY_NAME	CHARNWOOD
STATE_ABBREVIATION	ACT
POSTCODE	2615
LATITUDE	-35.20185603
LONGITUDE	149.03048051
MESH_BLOCK_CODE	80006300000

- ii. Each file is returned as a Pipe Separate File (\*.psv) of varying field lengths

#### 4.1.9 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 3<sup>rd</sup> 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

#### 4.1.10 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 as a Comma Separated (\*.csv) flat file with the following fields appended:

Field	Description
EMAIL_VALIDATION_CODE	Validation code for valid / invalid emails
EMAIL_VALIDATION_REASON	Level of validity or reason for invalid
DUPE_FLAG	Flags duplicate emails in file
CORRECTION_CODE	Code for GOOD_EMAIL email
GOOD_EMAIL	Syntax Corrections ONLY

- ii. MxValid Report (\*.html)

## 4.1.11 Mobile Bureau

**Mobile Bureau Key Details**

- i. Mobile Data should be provided to QAS in a Comma Separated Value file (\*.csv)
- ii. File name format: <<clientName>>\_DDMMYYYY-HHMM.csv
- iii. QAS PS will process the mobile records through the cloud.iQ Mobile verification engine to verify mobile numbers. QAS PS will not append new or corrected mobile numbers, or verify land line numbers.
- iv. The mobile number is expected to be in an international format without the leading '+' E.g. 61422123789. Australian numbers provided in non international format (E.g. 0422123789) may still be verified, however, the success rate cannot be guaranteed. International numbers in non international format cannot be verified.
- v. 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.
- vi. All work will be performed remotely from Experian in conjunction with cloud.iQ

**Mobile Bureau Deliverables**

- i. The input file will be returned as a Comma Separated (\*.csv) flat file with the following fields appended:

Field	Description
requestedMsisdn	Number formatted as supplied
Status	'0', '1', '2' '3' '4' '5'
Description	Description of Status
validatedMsisdn	Verified number in international format without the leading +
countryCode	Home country
countryISO	Country ISO alpha-2 code
countryName	Name of the country
operatorName	Company name of the MSISDN operator
operatorAlias	Operator brand name
operatorCountryIso	Country ISO alpha-22 code
operatorCountryName	Country name
portedStatus	'Yes' or 'No' indicating if the MSISDN has been ported
portedOperatorName	Ported operator company name
portedOperatorAlias	Ported operator brand name

## ii. Status Codes and Description

Status Code	Description	Comment	Example
0	Invalid	Invalid number format	Not enough digits, contains alphanumeric characters
1	Unknown	Valid number format, Unverified with network look-up, Unavailable	Mobile number is unregistered and / or doesn't belong to a network e.g. unactivated sim card
2	Absent	Valid number format, Verified with network look-up, Unavailable	Mobile phone is turned off or out of coverage at time of look up
3	Verified	Valid number format, Verified with network look-up, Available	Verified with network look-up and currently available
4	Teleservice not provisioned	Valid number format, Verified with network look-up, Unavailable	Not SMS provisioned
5	Call Barred	Valid number format, Verified with network look-up, Unavailable	Mobile number is blocked by the operator for SMS message or MNP (Mobile Number Portability) support isn't working and not letting a lookup to succeed

## 4.1.12 Append Bureau

**File Format and Data Handling**

- i. QAS PS will receive 1 file from <Company> containing <number> of records.
- ii. Data provided to QAS PS should be a comma delimited or pipe delimited file. Comma delimited files must provide data values that contain a comma within quotation marks. The file must have an extension of "txt" or "csv".
- iii. Required field headings:
  - FIRSTNAME
  - MIDDLENAME
  - SURNAME
  - FULLNAME
  - ADDRESSLINE1
  - ADDRESSLINE2
  - ADDRESSLINE3
  - LOCALITY

STATE

POSTCODE

PHONE1

PHONE2

PHONE3

CUSTOMERREFERENCE

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.

All work will be performed remotely from Experian offices

#### **Address Bureau**

- i. QAS PS will process address records through QAS Batch engine under Whole Address Mode
- ii. QAS PS will provide updated records for automatically matched records (R9 results). QAS PS will not manually clean unmatched records
- iii. Matched Addresses will be provided in abbreviated format.

#### **Append Bureau**

- i. QAS PS will process address records through Acceleon Matching engine.
- ii. All names, addresses and telephone numbers are parsed and standardized into a common format for processing in the Acceleon Matching engine
- iii. Acceleon Matching engine will match input data, append telephone numbers, correct address details and assign a Match Description. Match Descriptions: Excellent, Very Good, Good, Fair, Phone Only.

\*Locate Mode is available as add on to Append Bureau. Locate mode will provide trace through by matching the input record to a historical record and the system being able to move the person to a new known address.

#### **Append Bureau Deliverables**

QAS PS will provide an Excel file containing the following tabs:

- i. Summary – summary report for Address Bureau and Append Bureau
- ii. Input Data – original input fields, new fields appended for cleaned and parsed addresses
- iii. Quick View – original input field, new fields appended for append results
- iv. Phone - listing of all telephone matches achieved for this input file
- v. How to use – how to use guide

#### 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