

APS Managed Services Agreement

What will be delivered under the plan

APS will provide and install all **General Release** updates and improvements (hotfixes and service packs) to the APS Software throughout the lifecycle of this agreement. These upgrades are limited to our standard suite of applications as listed below, and any additional APS software as the parties may agree upon in writing from time to time.

Included	
APS Practice Management	Approximately one main release and one service pack a year
APS Practice IQ	Approximately one release (from PIQ 9 to PIQ 10.1)
APS Tax	Approximately two (NZ) or five (AU) upgrades a year
APS XPA, APS Xcede Reporting Engine, APS Xcede Standard Sheets	Approximately one sheets release and one software release per year
APS Workpaper Management	Approximately one main release plus a service pack
APS SyncDirect	Approximately one upgrade per year
BPA	Approximately one upgrade per year

What is excluded under the plan

The following APS Software is out of scope for the purpose of the Managed Services Plan and any upgrades are considered Consulting work and will be chargeable and subject to the standard Consulting Process.

Excluded	
Business Process Automation (BPA)	New alerts will require consulting resources
Practice IQ	Customised reports will require Consulting/Tech work
Customised Xcede Professional Accounting Sheets	Customised Sheets will require Consulting work

Any training required as a result of upgrades is not covered under the Managed Services Plan and will be chargeable and subject to the standard Consulting Training Process. Should any major upgrades be taken that require user training, a training plan should be discussed with Client Success prior to the upgrade work being carried out.

Database maintenance plans are excluded from this agreement. APS strongly recommends a nightly backup of your APS Databases. Database maintenance should be discussed with your IT provider or Database Administrator.

Server migrations and software re-installations are not covered under the Managed Services Plan. Any work required as a result of server and/or database migrations may be chargeable and subject to the standard Support or Consulting Process.

Where required, third party applications (Microsoft Office, SQL or Adobe reader etc.) may require updates prior to upgrades being carried out. These applications and the management of their upgrades are not covered under the APS Managed Services Plan and are the responsibility of your Practice.

The APS Managed Services plan is only applicable to clients with a standard Terminal Server environment and does not include upgrades to individual workstations.

How upgrades will be delivered

In relation to APS Managed Services, service/maintenance releases will be managed and installed by APS. However, all pending updates that we deem essential will be notified to the client via phone call and email with an update schedule advised. If additional training is deemed appropriate because of the upgrade, the client will be notified of such, all additional training is provided either remotely or on-site and charged at a standard consulting rate.

All applied updates will be general release products and when a major upgrade is deemed appropriate an upgrade plan will be provided to the client where both parties can agree on a suitable time to complete the upgrade and appropriate training can be planned and co-ordinated. (All additional training and configuration will be charged at standard consulting rates).

Prior to any work being carried out under the APS Managed Services plan, the Client Success representative will back up your Practice's current APS databases to ensure there is a roll back position.

After completion of any upgrades under the APS Managed Services plan, the Client Success representative will conduct general testing on the software prior to handing the systems back to your Practice for general use. Any issues that develop after handover should be logged via our standard support process.

Delivery of the service

All upgrades, service packs and hotfixes will be managed by APS Client Success and delivered to your business via remote session within 14 days of the upgrades being released to the general market.

All standard upgrades covered by the APS Managed Services plan will be carried out by a Client Success Support Officer. However, work may be carried out by an APS Client Success Consultant or APS Client Success Technical Consultant where more technical work or where customisations are required.

APS delivery requirements

Your Practice must provide APS with the necessary remote access to their designated Computer, Terminal servers and SQL Servers as required so that APS may provide its Managed Services. APS will request that you make this facility available as and when it is necessary to perform maintenance work remotely, at which point you will provide the necessary access information such as user name and password and ensure that adequate rights and permissions are associated with the relevant login accounts to perform its obligations under this plan.

APS does not guarantee performance of the Managed Services described herein if your Practice does not provide such remote access.

Where system downtime is required, APS Client Services will liaise with your designated contact on a mutually agreed time for all users to be out of APS Software and/or Terminal Server sessions until such time as the upgrades are complete.

All APS upgrades will be completed within a mutually agreed timeframe between the hours of 6:30am to 7:30pm Monday to Friday. Weekends and public holidays are not included in the standard APS Managed Services business hours of operation.

Any work that is required to be completed outside of standard business hours of operation is at the discretion of APS Client Success.

Client Support Process for Upgrades

The following information outlines the process that APS will take to perform any upgrades to your system:

Once an upgrade has been released to the market and an email has been sent to all relevant APS Clients advising release availability, an APS Client Success Support Officer will contact the designated key contact within your Practice to discuss the upgrade and agree to a timeframe for this to be implemented. It is the responsibility of the designated key contact to review the release documentation and ensure that relevant users in the practice have been made aware of any changes.

During the initial contact the Client Success Support Officer will;

- Obtain details regarding any specific customisations.
- Confirm Remote desktop information.
- Client environment e.g. terminal servers, application servers etc.
- SQL and Microsoft Office versions. (Where applicable)
- Confirm time with your designated key contact for the upgrade to occur.

At the agreed time for the upgrade or as appropriate, an APS Client Success representative will contact the designated key contact to ensure work can commence and that all users are out of the system.

The APS Client Success representative will then backup the APS database and then install the upgrade.

The APS Client Success representatives will test general functionality and accessibility of the software and ensure that the upgrade versions are correct.

Once successfully completed the APS Client Success representative will advise the designated key contact via phone call or email advising that the system is available for general use.

Should an APS Client Success Consultant be required for customisation work or training then a request will be logged to the Consulting Team and time be agreed upon for this work to be carried out prior to any upgrades being carried out.

Should an APS Technical Services Consultant be required for technical upgrades or customisation work then a request will be logged to the APS Technical Services Team and a time be agreed upon for this work to be carried out.

Storing of Information

APS holds the privacy of client data with the utmost importance and recognises that it must conduct its activities in a manner designed to protect any information concerning your Practice from improper use or disclosure.

APS has implemented an Information Security Management System (ISMS) that complies with the ISO27001 standard.