



## Who Are We?

### **Mark Oberman**

- has an extensive background in social service governance
- has a history of success in the commercial sector in NZ and overseas
- is the Director of SAB Trading Ltd.
- provides governance and consultancy within the commercial and not-for-profit sectors.

### **Michelle Beavan**

- has an extensive clinical background and currently teaches for CPS
- experience in NGO management and governance
- is the Director of Developing Potential Ltd
- provides consultancy to the not-for-profit sector.

Because we come from your sector we have an intrinsic understanding of the issues and pressures you face.

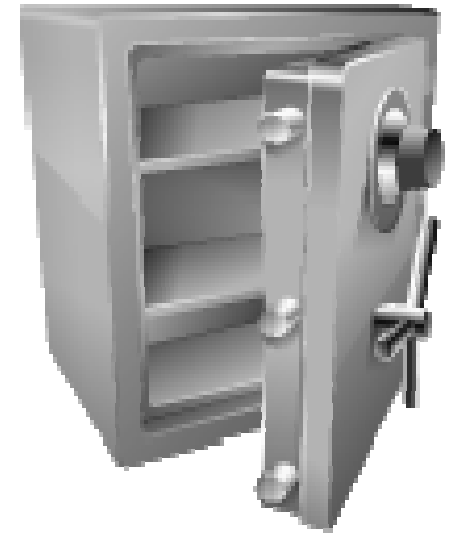


## Why Exess

- Exess is very user friendly – if you can e-mail then you can use Exess
- We come out of your sector
- Exess provides you with exceptional reporting capabilities - all you have to do is capture the info and we do the rest
- It is not an “off the shelf” product
- Whatever your delivery model is, Exess is relevant
- Exess works on both Microsoft & Apple platforms – if you can access the internet then you can use Exess
- Exess can be used on ipads & pda’s
- Exess has applicability across all sectors – all partners can use it equally successful (great for Whanau Ora!)
- Exess is scalable, it can grow exponentially with your organisation

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## With Exess you will

- Improve the safety, efficiency and quality of your service
- Capture and disseminate critical client information to your staff more efficiently
- Keep client data more secure
- Access expert information from any location – no matter how remote
- Support case decisions with clear, instant evidence
- Create client outcome and organisational reports that capture accurate information for funders, governance bodies and management planning



## Interoperability

- Exess can evidence a high degree of interoperability as one of the outstanding features of its PHP5 platform.
- Exess anticipates your needs to speak to other databases both now and in the future.

Investing in Exess is an investment in the latest technology and that helps future-proof your organisation to the highest possible standard.

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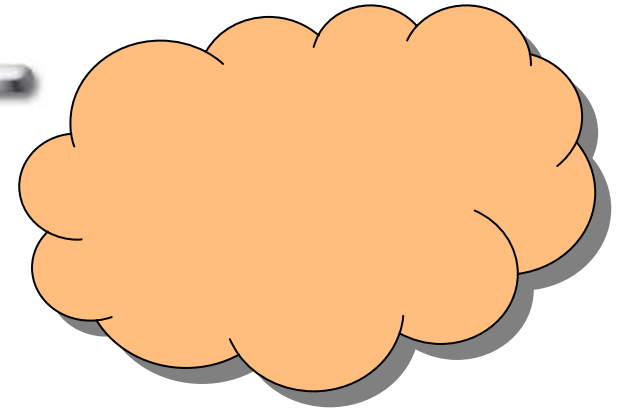


## Features include:

- Easily add, manage and review your clients details
- Capture all relevant information including Alerts
- Track your client notes with auto date stamp and author signed entries
- Track time spent on cases, costs attached and mileage
- Attach multiple external documents to client files
- Collect genogram information
- Message casenotes to colleagues
- Schedule follow-ups and appointments and due dates via the calendar functions
- Create your own customised form letters, referral documents and questionnaires
- Store client photos
- Track the involvement of other professionals
- Create flexible, customised, complex reports, including PRIMHD mental health reports

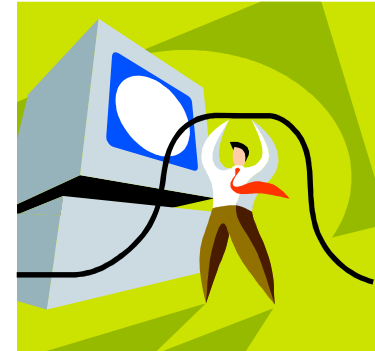
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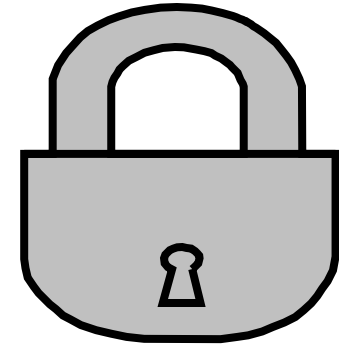
## Exess is Cloud Based

- The main Exess Server is hosted in a secure facility
- Data Centre Tier Rating: 3
- Fully redundant architecture utilising dual Cisco 6500 core switches.
- Fully redundant FortiGate appliances for network security.
- Multiple POEs (Point of Entry) for fibre using Border Gateway Protocol (BGP4) core routing to eliminate network downtime.
- Independent networks for backups, management and public services ensure the highest levels of security and performance by segregating traffic on physically separate networks.
- 99.99% Core Network Service Level Agreement.



## Power back-up features include:

- Segregated fire-rated power room, independent biometric access.
- Custom designed and engineered main switchboard with dual A + B (2N) power supply and integrated ASCO automatic transfer switch (mains/generator).
- Olympus auto-start diesel generator, serviced and load tested monthly with 24 hour on site diesel storage.
- Dual A + B (2N) power feeds to A + B (2N) UPS's Uninterruptible Power Supply (UPS).
- Dual A + B (2N) metered and monitored PDU's (Power Distribution Units) in each 19' cabinet.



## Security of data

- Exess uses a dedicated server - NOTHING else runs on there; it's a real machine NOT a virtual machine
- There are NO non-essential services running on the box - just the bare minimum to support Exess (for example, there is no FTP service)
- The Exess server is behind a firewall that restricts traffic to ports 22, 80, and 443
- All data is transferred over SSL (we only use port 80 for Google Maps)
- Data is encrypted for backups
- Remote shell access (for programming work) to the server is strictly limited and controlled
- The server is patched and all applications kept-up-to-date
- The database does NOT listen for remote connections

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## Security of our data centre

- Private Data Centre - invited, escorted access only.
- No signage, nondescript building.
- Single entry and exit point, using biometric devices and man-trap access.
- Network cameras monitoring and recording all movement - no blind spots.
- Perimeter fencing encompasses the data centre with CCV (closed circuit video)
- Surveillance cameras recording all entry/exit points and open areas.
- Security patrols nightly at random times to ensure the location remains secure.
- After hours access to the location is via keypad entry only.

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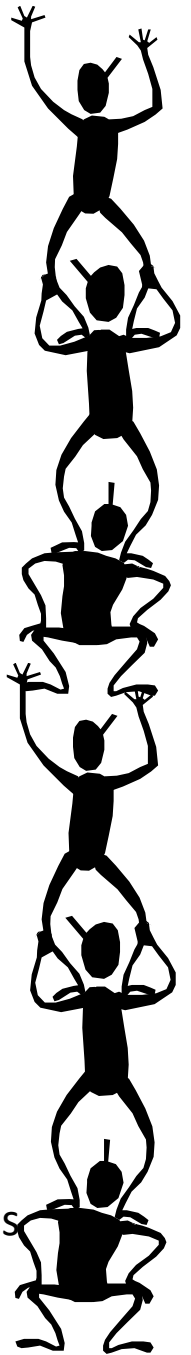


## Back-ups & Disaster Recovery

- Main server in the South Island
- The diesel generator activates in power failures
- Daily back-ups occur to a server in the North Island which is structured to accommodate additional archiving, data loss and disaster recovery
- The secondary server will ensure Exess is fully operational if a disaster occurs in the South Island
- Exess is backed up from the secondary server to a third server for added security
- Exess has had zero unplanned down-time in 18mths of operation

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## Support

### Training

- hands-on training to new users as a group.
- follow-up training (at no cost) available if needed

### Manual

- comprehensive user manual provided.
- Updates to the manual are made each time an enhancement is made to Exess.

### Support

- 24/7 support is available 365 days of the year via telephone and e-mail.
- We call in and visit from time to time to ensure everything is going well.

### Newsletter

- a quarterly newsletter keeps you updated with new developments and introduces our new customers to you.

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## All development in Exess is customer driven



Exess has a web-based User Development Forum that provides:

- A forum for our customers to discuss development ideas
- A place for customers to discuss their particular needs, share ideas and support each other to find solutions
- Recommendations from the group are made back to Exess to shape the development plans going forward
- The forum is chaired by Dave Eggers, IT Coordinator, Dunedin Methodist Mission.
- Our relationship with you is very important to us. We are committed to listening to you and responding to YOUR particular needs.



Don't believe us – talk to our customers!



*As a self acclaimed computer nerd who has a history of working with computers and programmes, I find this system to be efficient and user friendly. I love the fact that Exess is on an external server and readily accessible from any computer with internet access.*

*The support from Mark and Michelle has been great, and we've been able to make changes to suit our specific needs as an organisation.*

Jo Apanui

Team Leader

Whakatohea Iwi Social & Health Services

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*“Youth don’t always stick to a 9 to 5 timeframe and crisis or incidents can happen at anytime. For example a young person I was working with aged 11 went missing over a weekend.*

*I supported the family to make a missing person report. They did not have a recent photo and I had one on file in Exess. I had all relevant information at my finger tips even though I was with family in Rotorua and I work and live in Hamilton. The report was emailed off with all contact information and up to date relevant information that was case-noted on Exess.*

*I was able to update any progress including phone calls in and out. The file and case-notes around this incident are clear and organised all in step by step inputs that are dated and timed”.*

Sarah Jayne McLachlan

Youth Worker

The Hub

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## Contact us:

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