

ServWare

Improving the Way You Serve Others



serving in hope
servir dans l'espoir

ServWare was founded by Vincentians from the Dayton, Ohio area in 2012 and incorporated in 2013. In 2017, ServWare became a National Partner of the National Council of Saint Vincent de Paul USA.

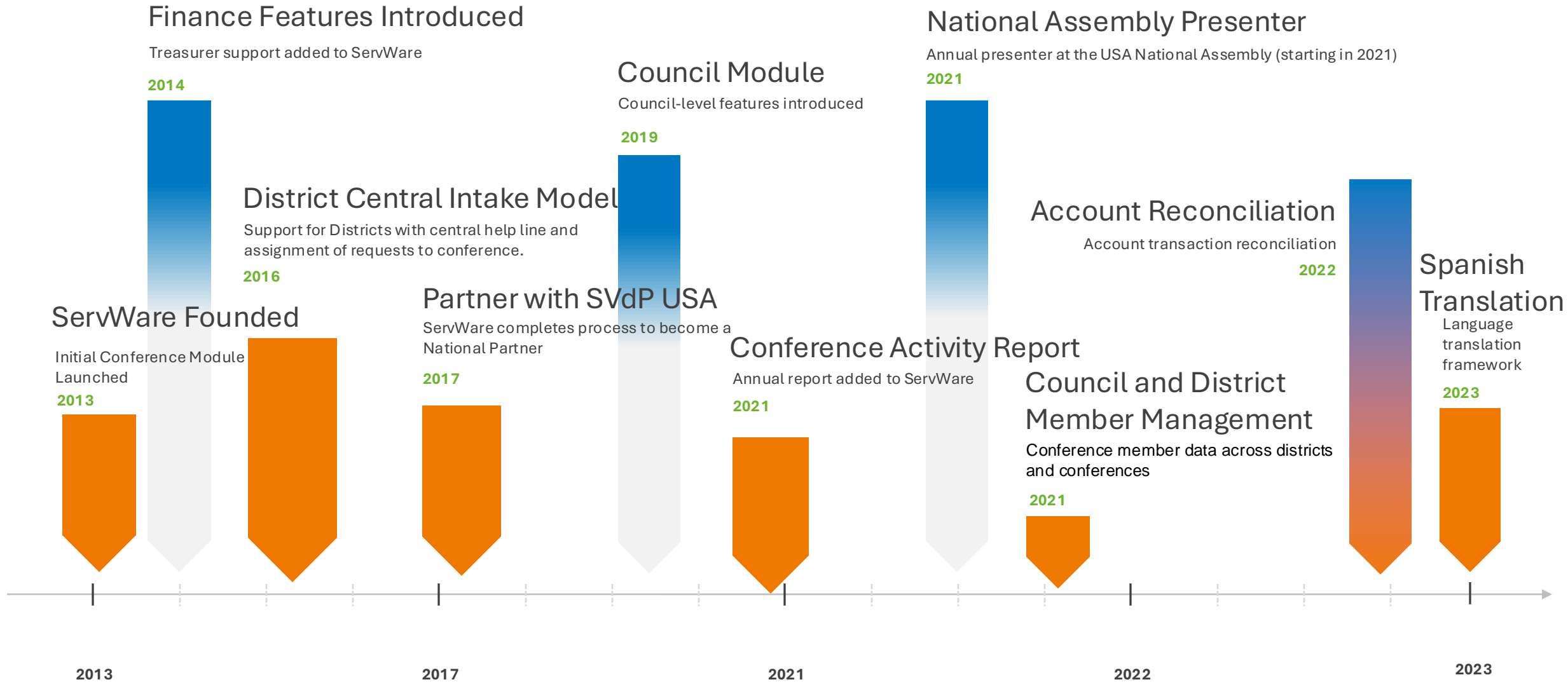
ServWare was created to support case management at the conference level and has since evolved to support Council needs. Nearly all members of the ServWare team are highly experienced software professionals with over 30 years each.

We know that some conference members may be apprehensive about using a web-based application, so we designed a simple, intuitive workflow that is easy to learn and use. We have had great success in this area with many positive testimonials from ServWare users. It is also compatible with any device, such as smartphone, tablet, or laptop/desktop computer.

We utilize customer feedback for new features and improvements. As a result, ServWare is a very robust, extensible, secure, and easy to use application



ServWare Enhancement Timeline - Highlights



Conference Features

- Record neighbour information including household members, income, expenses, and more
- Track neighbour requests and the assistance provided
- View assistance request history details
- Schedule, assign, and manage home visits, or other visit types
- Generate detailed assistance reports, membership reports, and annual report
- Customize conference assistance types, referral agencies, landlords, utilities and more
- Upload files for association with neighbour requests and for conference operations
- Communicate with conference members through calendar and messaging features
- Enter and report mileage and hours in service for conference members
- Track conference finances such as expenditures, receipts and donors
- Store information securely and reliably on the Amazon cloud

Council Features

- View, update, and copy council neighbours between conferences
- Assign requests for a council neighbour to an individual conference
 - New council-initiated requests generate an email to the conference referral contacts
- Upload files that will be available to all council members and optionally conference members
- Create and send messages to council or conference members
- Create council user accounts for your members and assign permissions to each account based upon the council member's role in your organization
- Council address mapping options:
 - Import or export council addresses and conference mappings
 - View council address information and conference assignments
- Edit details for conferences in your council
- View, print, or export a Conference Request Report
- Manage conference member data across council conferences
 - Filtering by member type, position and conference
 - Ability to export conference member data to Excel

Central Council Features

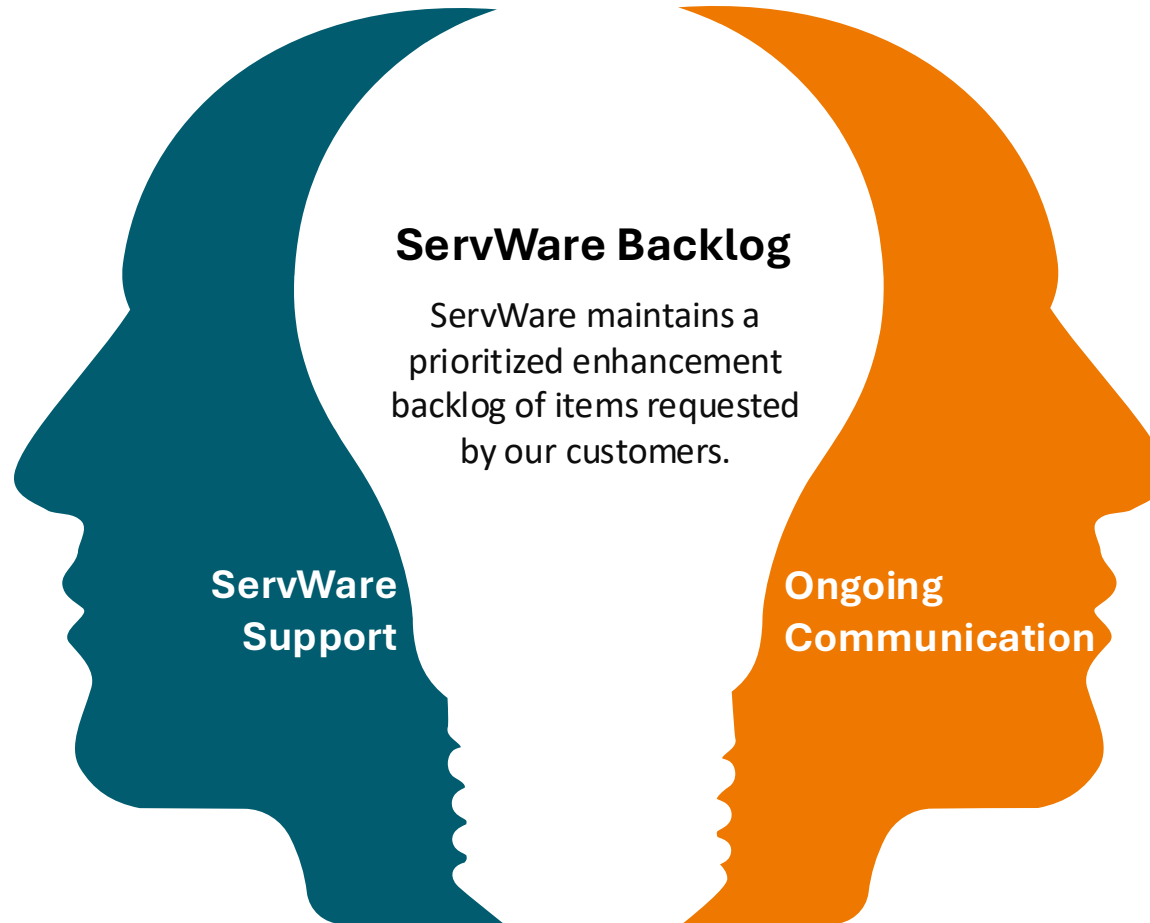
- Ability to view and manage neighbor records across council /conferences
 - Includes viewing neighbour request history
- File Management
 - Upload files that can be shared with ServWare council and conference users
- Define central council-wide assistance types that are applied to a new conference as part of the conference setup
 - Can't delete or make inactive at the conference level
- View council and conferences list for the Central Council
- Conference member data across councils and conferences
 - Filtering by member type, position, district and conference
 - Ability to export conference member data to Excel
- Ability to define specialized Conference Activity Report (CAR) categories that differ from the SSVP National report categories
- Create central council user accounts for your members and assign permissions to each account based upon the member's role



Support and Communication

Support Channels

- Support ticketing system accessible from the application 24 X 7. All tickets receive first response within 24 hours
- YouTube Training Channel
- User and QuickStart Guides available within the application
- Zoom-based training included as part of onboarding process
- Periodic, custom training available to customer base, such as Treasurer and administrator training



Communications

- Release Notes are sent to all conference, district and council contacts as well as posted to Messages area in ServWare upon deployment of patches and releases
- Notification messages posted on ServWare Home Page in advance of any downtime for enhancement releases
- ServWare User Group participation by the ServWare team as requested

Security Model

- **TLS (Transport Layer Security)** - this involves encryption using a digital certificate that securely encrypts the data transferred between the user's device and the application. This is the same type of encryption used for online banking and online purchases.
- **User Credentials** - all users are required to have a unique user name as well as what is considered a strong password which includes requirements to ensure the password has a sufficient combination of upper and lower case letters, numbers, and special characters.
- **Auditing** - All updates to data in ServWare are audited to include the user name making the modification as well as the timestamp.
- **Administrators** - only the conference administrator role has permissions to perform special functions such as creating new conference members and activating existing conference members and deleting critical data such as a neighbor or request entry.
- ServWare is hosted on Amazon's cloud infrastructure which is highly secured. In order for ServWare data to be breached, it would imply that the Amazon security has been breached. ServWare does not store complete SSNs, credit card, or personal financial information, which is normally desired for identity theft. To date, there have been no security threats or data breaches. In the event that this would occur, we would notify conference administrators of the situation.
- In early 2022, ServWare completed formal application penetration testing through a 3rd party security risk organization. As part of this testing, one potential item was identified related to access vulnerability. This item was immediately resolved in the production environment.



Roadmap Highlights - 2024

ServWare enhancements are delivered throughout the year with focus on highly-requested features, as well as features that will benefit the conference, council and central councils that partner with us.

- **Key Roadmap Enhancements for 2024:**
- Enhanced Pantry Workflow Support
- Aggregated Reporting at the council level for the Conference Activity Report (Annual Report)
- Addition of Custom-Defined Fields per Conference
- Integrated Thrift Store Vouchers
- Micro-Loan Tracking
- And many other enhancements based upon customer feedback



Live Demonstration

The ServWare team will conduct a live demonstration of the key features and functionality of ServWare and will allow time for Q&A.

The screenshot shows the ServWare interface for a 'SW Demo Conference'. The main area is a calendar for February 2023, displaying various events such as home visits, packing lunches, and conferences. On the right, there are sections for 'Messages', 'Open Follow-Ups <30 days', 'Recent Neighbors', 'Voucher Quantities', 'Recent Assistance Requests', and 'Statistics'.

Completed Requests (FY)	44
Open Requests (FY)	12
Completed Requests - Feb	5
Home Visits Completed (FY)	30
Home Visits Completed - Feb	7
Total Neighbors	152

The screenshot shows the 'Neighbors' section of the ServWare interface. It includes a search bar for household members, a 'Search By DOB' field, and a table of neighbor records. The table has columns for Last Name, First Name, Street Address, Home Phone, Mobile Phone, SSN (Last 4), and DOB. Each record has an 'Edit' button and a 'New Request' button.

Last Name	First Name	Street Address	Home Phone	Mobile Phone	SSN (Last 4)	DOB	History	
Abacuss/Adams	Don/Ann	123 Leycross Dr. Apt X	(937) 214-4411	(937) 638-4016				
Able	Ann Marie	1200 Leycross Dr. Apt. K	(376) 999-9233	(513) 233-1123		01/01/1990		
Able	Beth	5422 Anderson Blvd		(937) 322-1111		02/12/1975		
Able	Jennie Aka: Amy	957 Marshall Rd. Apt. C	(938) 623-8765					
Able	Mike	TBD	(525) 987-5478	(937) 434-9231				



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Links to Demo Videos

[What is ServWare video](#)

[ServWare Conference Capability Video](#)



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Merci d'avance pour votre soutien !