

XeFr Service Definition Document

1. Executive Summary

In today's digital landscape, organisations struggle with fragmented data across multiple systems, manual processes that drain productivity, and the challenge of extracting meaningful insights from disparate sources. XeFr addresses these fundamental challenges by providing a sophisticated yet accessible enterprise data platform that acts as an intelligent layer above existing infrastructure.

Developed by Xerini, a UK technology company founded by former Morgan Stanley professionals, XeFr represents a paradigm shift in how organisations approach data unification. Rather than forcing costly system replacements or complex migrations, XeFr seamlessly connects to existing platforms, from Xero to SharePoint, from Monday.com to bespoke databases, creating a unified view that transforms operational efficiency.

What sets XeFr apart is its AI-powered core, enabling natural language queries across all connected data sources, automated document processing, and intelligent workflows that learn and adapt. With XeFr, organisations can design custom workflows, interfaces, data views, and AI-powered features to create complete applications tailored to their operations — all running securely on the unified data layer. The platform has already delivered transformative results for clients including National Highways, Metrolinx, CMi2i, and the British Board of Agrément, reducing report generation from hours to minutes and uncovering insights previously hidden in data silos.

As a UK-based solution with guaranteed data sovereignty, ISO 9001:2015, ISO 27001:2022, and Cyber Essentials certification, XeFr meets the stringent requirements of government and enterprise clients while remaining agile enough to configure for specific sector needs. This service definition outlines how XeFr can serve as your organisation's "breath of fresh Air", a phrase our clients use to describe the transformation from data chaos to clarity.

2. Service Description

XeFr emerged from a simple observation: while organisations have invested millions in specialised systems, the very specialisation that makes these tools powerful also creates isolation. Data sits in silos, insights remain undiscovered, and staff waste countless hours manually bridging gaps between systems. XeFr transforms this fragmented landscape into a cohesive, intelligent ecosystem where data flows freely and insights emerge naturally.

2.1 Core Service Offering

At its heart, XeFr is more than a data platform, it's an organisational transformation tool that preserves your existing technology investments while exponentially increasing their value. The platform acts as an intelligent orchestration layer, using advanced AI and configurable workflows to create a single source of truth without the disruption of system replacement.

Our approach is fundamentally different from traditional integration platforms. Where others require extensive coding and rigid mappings, XeFr uses AI to understand context, relationships, and meaning across your data landscape. This intelligence manifests in practical, powerful capabilities:

- **Unified Data Platform:** Integration with existing systems (Xero, Monday.com, SharePoint, etc.) without replacement
- **AI-Powered Intelligence:** Natural language queries, automated document processing, and semantic search
- **Custom Workflows:** Configurable forms, dashboards, and business logic
- **Document Management:** Full-text indexing, metadata extraction, and automated summarisation
- **Advanced Analytics:** Real-time dashboards, Power BI integration, and custom reporting

2.2 Service Tiers

Starter

- Standard data tables and forms
- Charts and dashboards
- External system connectivity
- Azure hosting (UK South)
- Standard support

Professional

- All Starter features
- Mapping and geolocation tools
- AI-powered search and data enrichment
- AI co-pilot interface
- Document support with full-text indexing

Enterprise

- All Professional features
- Semantic search across documents
- OAuth2/SSO integration
- OData API access
- Advanced integrations
- Dedicated support options

3. Technical Architecture & Requirements

Modern organisations require flexibility in how and where their data is processed and stored. XeFr's architecture reflects this reality, offering deployment options that range from fully managed cloud services to on-premises installations, all while maintaining the same powerful capabilities. This flexibility ensures that whether you're a small organisation seeking simplicity or a government department with strict data sovereignty requirements, XeFr adapts to your needs rather than forcing compromise.

3.1 Deployment Options

Standard Cloud Deployment

- Hosted on Microsoft Azure (UK South)
- MongoDB Atlas database (Azure UK South)
- Load-balanced architecture for scalability

Alternative Deployment Options

- Docker container deployment to customer's cloud provider
- On-premises installation with full support
- Geographic data residency (UK guaranteed for enterprise and government clients)

3.2 Technical Requirements

Client Requirements

- Modern web browser (Chrome, Edge, Safari, Brave)
- JavaScript enabled
- Internet connection

Integration Capabilities

- RESTful API with Swagger documentation
- OData interface for read-only access
- OAuth2 authentication with MFA support
- Azure Entra ID integration
- API rate limit: 1,000 requests/hour (negotiable for enterprise)
- Maximum payload: 10MB per request

3.3 Storage & Limitations

- Structured data: 8GB (expandable)
- Document storage: 3TB (expandable)
- Additional Azure storage available on request
- No user number limitations (per-user licensing model)

4. Security & Compliance

Security isn't an afterthought at Xerini, it's fundamental to everything we build. Having developed systems for investment banks where a single breach could cost millions, our founding team brings institutional-grade security thinking to every aspect of XeFr. This commitment goes beyond technical controls; it's embedded in our culture, processes, and continuous improvement practices. Our triple certification in ISO 9001, ISO 27001, and Cyber Essentials demonstrates that security and quality management are not just policies, but proven, audited realities of our operation.

4.1 Certifications

- ISO 9001:2015
- ISO 27001:2022
- Cyber Essentials Certified
- GDPR Compliant

4.2 Security Controls

Data Protection

- TLS/SSL encryption for data in transit
- Encryption at rest via MongoDB Atlas
- Role-based access control
- OAuth2 with multi-factor authentication
- Azure Entra ID integration for enterprise SSO

Security Monitoring

- Microsoft Azure Defender for App Services
- Regular MEND dependency scanning
- NPM audit for frontend components
- Annual penetration testing
- Real-time threat detection and automated containment

4.3 Data Governance

- Full customer data ownership retained
- Data Processing Agreement available
- GDPR-compliant data handling
- UK data residency guaranteed for government clients
- No third-party data sharing

5. Service Levels & Availability

Reliability isn't just about technology, it's about trust. When organisations depend on Xepr for critical operations, they need confidence that the platform will be available when needed, responsive when accessed, and supported when questions arise. Our service level commitments reflect this understanding, with clear, measurable guarantees backed by automatic service credits. This transparency ensures that our success is directly aligned with yours.

5.1 Availability SLA

99.9% Monthly Uptime Guarantee

Service credits apply when availability falls below guaranteed levels:

- 99.5% - 99.89%: 5% credit
- 99.0% - 99.49%: 10% credit
- 95.0% - 98.99%: 25% credit
- Below 95%: 50% credit

Exclusions: Planned maintenance (72-hour notice), customer-caused issues, third-party failures, force majeure events, emergency security patches

5.2 Support Tiers

Standard Support (Included)

- Business hours: 08:00-18:00 GMT/BST Monday-Friday
- Response SLAs:
 - P1 (Critical): 1 hour
 - P2 (High): 4 hours
 - P3 (Medium/Low): Next business day
- Security patches and bug fixes
- Documentation portal access
- Quarterly service reviews

Enhanced Support

- All Standard features
- Named technical support engineer
- Proactive integration monitoring
- Monthly health checks
- 20% Professional Services discount

Enterprise Support

- Dedicated Technical Account Manager
- Priority support queue
- Fortnightly reviews
- Included Professional Services days
- Strategic roadmap planning
- Negotiable enhanced SLAs

6. Business Continuity & Disaster Recovery

Data is the lifeblood of modern organisations, and protecting it requires more than good intentions, it demands systematic, tested, and proven approaches to backup and recovery. Our

business continuity strategy builds on enterprise-grade MongoDB Atlas capabilities enhanced with Xerini's operational procedures, ensuring that your data remains protected, recoverable, and available even in the face of unexpected events. This multi-layered approach provides peace of mind while maintaining the flexibility to meet specific regulatory or business requirements.

6.1 Backup Strategy

- **Hourly snapshots:** Retained for 7 days
- **Daily backups:** Retained for 30 days
- **Monthly archives:** Retained for 12 months
- Automated backup via MongoDB Atlas

6.2 Recovery Objectives

- **Recovery Time Objective (RTO):** 4-6 hours
- **Recovery Point Objective (RPO):** Maximum 1 hour data loss
- Full restoration capability from backups
- Alternative deployment options available

6.3 Resilience Features

- Load-balanced architecture
- Auto-scaling capabilities
- Geographic redundancy options
- Continuous monitoring from multiple locations

7. Service Management

Effective service management is about proactive communication, rapid response, and continuous improvement. Our approach combines automated monitoring with human expertise to ensure that issues are detected early, resolved quickly, and learned from systematically. This operational excellence framework, refined through years of supporting mission-critical systems in financial services, ensures that XeFr remains a reliable foundation for your digital transformation rather than another system requiring constant attention.

7.1 Maintenance Windows

- **Routine maintenance:** Weekends (advance notice provided)
- **Urgent patches:** After 17:00 GMT weekdays
- **Critical security updates:** 72-hour notice minimum
- **Planned downtime:** Excluded from SLA calculations

7.2 Incident Management

Response Process

1. Incident reported via support@xerini.co.uk
2. Immediate triage and classification
3. Investigation initiated per SLA
4. Automated containment for security incidents
5. Customer notification within 30 minutes (confirmed incidents)
6. Hourly updates during resolution
7. Post-incident report within 5 business days

Monitoring & Detection

- 24/7 automated monitoring
- Azure Defender integration
- Performance metrics tracking
- Proactive alerting systems

7.3 Change Management

- Advance notification of changes
- 72-hour minimum notice for service updates
- Release notes provided
- Rollback procedures in place

8. Onboarding & Offboarding

The beginning and end of a service relationship are critical moments that set the tone for everything in between. Our onboarding process is designed to deliver value quickly while building the foundation for long-term success. Equally important, our offboarding provisions ensure that should you ever need to transition away from Xepr, your data remains yours, fully accessible, portable, and unencumbered. This commitment to data ownership and portability reflects our confidence that clients stay with Xepr because of the value we deliver, not because they're locked in.

8.1 Onboarding Support

- Initial consultation and requirements gathering
- System configuration and customisation
- 0.5-1 day on-site training (available as additional service)
- Documentation and user guides
- Post-implementation support

8.2 Offboarding Process

- **Notice period:** 48 hours minimum
- **Data export:** Database dump provided at no additional cost (JSON/BSON format)
- **Additional support:** Custom formats and filtering available
- **Data retention:** Flexible retention periods (typically 12 months post-contract)
- **Data deletion:** Complete removal upon request

8.3 Data Portability

- Full data export available anytime via admin tools
- CSV export functionality for all data
- API access for programmatic extraction
- No vendor lock-in

9. Service Constraints & Customisation

Every platform balances flexibility with stability, and XeFr is designed to provide extensive customisation capabilities while maintaining a robust, supportable core. This approach means that organisations can tailor the platform to their specific needs through configuration rather than code, dramatically reducing implementation time and ongoing maintenance burden. Where deeper customisation is required, our architecture supports extensions without compromising the core platform's integrity or upgrade path.

9.1 Customisation Capabilities

- Extensive configuration without code changes
- Custom workflows and business logic
- Branded interfaces and white-labelling
- Custom code extensions supported
- API integrations with third-party systems

9.2 Constraints

- Core data model structure maintained
- Standard UI/UX navigation framework
- API rate limiting applies (negotiable)
- Storage limits per tier (expandable)

10. Artificial Intelligence & Data Governance

Trust in AI systems begins with absolute clarity about how data is handled, processed, and protected. At Xerini, we recognise that your data represents not just information but organisational intelligence, citizen trust, and competitive advantage. Our AI governance framework ensures that while you benefit from cutting-edge artificial intelligence capabilities, your data sovereignty and security are never compromised.

10.1 Data Usage Principles

Our commitment to data protection is unequivocal and non-negotiable:

- **Exclusive Purpose:** Client data is used solely for providing the contracted XeFr services to that specific client
- **No Model Training:** We never use client data to train, improve, or develop AI models
- **Complete Isolation:** Each client's data remains completely isolated from other clients' environments
- **No Data Monetisation:** Client data is never sold, shared, or used for any purpose beyond service delivery
- **Transparent Processing:** All data processing activities are documented and auditable

10.2 AI Model Architecture

XeFr leverages advanced AI capabilities while maintaining strict data governance:

Foundation Models

- Enterprise-grade third-party models (e.g., OpenAI Enterprise, Azure OpenAI Service)
- Contractual guarantees that prevent model training on client data
- API-based integration ensuring data is not retained by model providers
- UK/EU hosting options available for model inference

Model Selection

- Carefully vetted providers with enterprise agreements
- SOC 2 Type II compliance required for all AI partners
- Regular review of provider data handling practices
- Option for clients to specify approved model providers

11. Commercial Terms

Our commercial model reflects our commitment to transparency, flexibility, and long-term partnership. We believe in clear terms that align our success with yours, comprehensive insurance that demonstrates our professional standing, and the flexibility to grow and adapt as your needs evolve. These terms provide the framework for a relationship built on mutual success rather than contractual complexity.

11.1 Contract Terms

- **Minimum term:** 12 months
- **Payment terms:** Monthly or annual (with available discounts)
- **Licensing model:** Per-user basis with no user number restrictions
- **Professional Services:** Available on Time & Materials basis

11.2 Insurance Coverage

- Professional Indemnity: £5 million
- Products Liability: £5 million
- Employers Liability: £10 million

11.3 Additional Services

- Professional Services consultancy
- Custom development
- Data migration support
- Extended training programmes

12. Contact Information

Open communication is the foundation of successful partnerships. Whether you're exploring how Xepr can transform your organisation, need support with an existing implementation, or simply want to discuss the art of the possible with data unification, our team is ready to help. Based in the heart of London's financial district, we combine the accessibility of a UK SME with the expertise typically found in global consultancies.

Xerini Ltd

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