

InfoSystems Integrated

Consulting Services for Advent Software Users



Why ISI?

Capable

InfoSystems Integrated (ISI) consultants have provided services to Advent Software users since 1988. With a wide variety of experience in investment operations, IT and development disciplines, we perform the vast majority of installs, upgrades and maintenance related to Axys, Qube, Moxy and BREU for our clients. Working in concert with advisors, we facilitate the changes necessary to streamline their technology-driven businesses.

Efficient

We specialize in working with financial services firms, particularly those that use Advent Software products. This focus has allowed us to gain valuable experience resolving problems, automating systems and enhancing reporting for many Advent users. Over the years, we have built a comprehensive library of applications, utilities, reports, scripts and macros for our clients. As needs arise, we are able to rapidly integrate and leverage components of our library to create operational efficiencies that save clients time and money.

Flexible

Though ISI provides most of the services that Advent Software's consultants do, like Advent installs and upgrades, our core competency is doing what Advent is unwilling or unable to do for their customers. Software and the vendors that create it rarely satisfy 100% of a financial advisor's requirements. We do our best to fill in the gaps and meet the remaining needs of our clients where it makes financial sense.

Knowledgeable

ISI willingly shares as much information with clients as requested, empowering your firm to solve its own issues whenever possible. Much of the specific experience that sets ISI apart is detailed and indexed by category on our site (www.isitc.com/projects), but our general experience related to Advent Software is listed below.

Summary of Consulting Services for Advent Users

- Installation/upgrades of most software, and optimization of workstations and servers with respect to Advent.
- Automation of daily pricing, downloads and reconciliation for Axys/APX.
- Automation of periodic and ad hoc report production for Axys/APX.
- Report creation for all Advent Software products using any combination of Replang, Report Writer Pro, compound report macros, Crystal Reports and SQL Server Reporting Services(SSRS).
- Integration of Advent products with Bloomberg, Excel, etc.
- Development of several applications that satisfy missing components of Advent's standard solutions.
- Creation of data conversion utilities, interfaces to support custodian feeds, reports/programs to perform data quality checks and various programs and scripts to keep Advent products running smoothly.
- Extracting and populating data to get nearly anything into and out of Axys/APX, Qube and Moxy.
- System maintenance of Axys, Moxy, and Qube.
- Backup and restore of all mission critical data related to Advent products.