

Leverage Your Axys Licenses

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For years Axys users have coped with the pains of trying to manage their user licenses and have likely spent money on additional licenses that they did not need. In our dual role as both IT consultants and software integrators, we are charged with providing solutions to any and all technology problems that make our clients' day-to-day working lives difficult. Our clients are honest and willing enough to pay for necessary licenses, but do not want to pay for more than they need. If they truly only need five licenses, why would they want to buy more? As a result of this prevailing logic and our expertise integrating all things Advent, we have fielded many requests to **"make the pain go away."**

As you may know, Axys uses a simultaneous user model. By definition, this model allows you to install Axys on as many PCs as you like, but will only allow the number of licensed users to utilize the software simultaneously. This is a reasonable licensing model that services many financial advisors well. Unfortunately, Axys users do not have the ability to easily see who is using the software and who has used the software over a period of time. Additionally, idle users are not automatically disconnected, as is possible in other software packages that employ a simultaneous user model.

The lack of these basic features is no doubt a disappointment to the Axys user base. The simple solution for companies with a generous technology budget is to just buy enough licenses so that everyone can get in at the same time; the rub is that you are charged by Advent for these additional licenses initially and forever more in your recurring annual fees.

Our firsthand experience with Advent clients indicates that users do not impulsively go out and buy new user licenses. They stew on it. They consider alternative solutions - even other portfolio management systems - to address their frustration with the user licensing snafus, but when the pain becomes too much to bear, most buckle and buy additional licenses.

Check who is using Axys

In smaller installs with a single user version of Axys, this is usually a non-issue, since folks pretty much know what user is in Axys all the time. With larger Axys installations where 3, 6, 10 or more simultaneous users are allotted, it is difficult to track who is in and who is out at any given time. Let's face it, having to find out why you cannot get into Axys during a client presentation is a pain. In its current iteration Axys is capable of doing nearly nothing to help you resolve this problem. Although there is a utility called UCOUNT in the Axys3 root folder, it only tells you how many of your user licenses are in use. You can control how frequently it checks the number of active users, but it is otherwise useless.

BREU (Browser Reporting for Enterprise Users) allows you to set a timeout period, which is helpful, but BREU does not allow certain Axys functionality, requires an IIS server and has a different licensing agreement than Axys.

Were you to try and use UCOUNT to resolve your inability to login to Axys during a hypothetical client meeting, you would need to contact everybody that might be in Axys until you found a person who could log out of Axys to free up a user license. More likely, you would ask one of your associates to assist you with this inefficient task to save face in front of your client, but it would still need to be done by someone.

FYI: Axys has the potential to misreport licenses in use. This issue is frequently the result of a hung Axys32.exe or Rep32.exe session on a workstation. When this occurs, it is necessary to find and end the task to clear the license lock. The shotgun approach of resetting your PC will work too. Occasionally, license counts get skewed making it necessary for an administrator to delete the PFE and PFI files to fix the Axys license count.

Understand the Alternatives

There are, however, ways to determine who is using Axys without bothering your co-workers. Axys uses two different types of file types (PFI and PFE) to track licenses in use. Users with administrative rights can effectively determine who is using Axys by doing a locked file search on these types of files. The file names are determined by your firm's license number. For example, if your Advent license number was 1000, you would do a search for all locked files named 1000.PFE in the Axys root and subfolders.

Equipped with the resulting information from the search, a power user could also issue a windows script command to kill/end an Axys32.exe, Rep32.exe or any other Axys program task on another user's PC remotely, but this would be ill-advised without knowledge of what the user was doing. If the user is out to lunch with no files open there would be no harm done, but if the user was posting trades, modifying files, updating performance, et cetera, it definitely would not be a good idea.

From our website (www.isitc.com/aug), feel free to download our basic Axys User Check program to help you identify who is using Axys at your firm. Users of this program will require additional administrative rights to be able to see the file locks of other users.

Make the right decision

In order to determine whether additional Axys user licenses are required you should have the ability to chart the times that various users are in Axys throughout the day. If you did have that functionality you could simply track who was in and when, and then discuss each individual's use of Axys with them to validate their needs. Once that analysis has been done, you would be equipped to justify or rebuff the purchase of additional licenses based on your documentation of simultaneous user requirements.

In order to provide a greater level of functionality, we also developed another methodology which does not require additional administrative rights in our ALOT (Axys License and Optimization Tracking) program to check active Axys users, track/graph historic usage and identify Axys user sessions that may be idle. If you wish to learn more about this application you can visit our website.

If you have questions, please feel free to contact me directly to discuss them.

About the Author:

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