

# Axys Release 15.2 System Requirements

## About System Requirements

- Advent tests only the English language versions of third-party products such as Microsoft Windows operating systems, Microsoft SQL Server, Microsoft Office, and more.
- Operating systems and configuration options that Advent does not list as supported in this document are not supported.
- These requirements reference the most recent service packs on third-party software that were available when Advent released this product. Although we have not tested service packs released since that time, we do not expect you to experience issues from installing service packs as they become available. Nevertheless, we recommend that you validate them in your test environment before applying them to your production environment.
- Advent provides performance and capacity guidelines for planning purposes only. Because many variables affect the performance of your system and the size of your data files, Advent assumes no liability for hardware purchase decisions. Please consult your systems consultant about specific configuration decisions.
- Advent supports only the English language versions of third-party products such as Microsoft Windows operating systems, Microsoft Office, Microsoft Active Directory, and more.

## Application Server

### Operating System

#### You Must Install One of These:

- Microsoft Windows Server
  - 8.1 Professional, 64-bit only
  - 8 Professional, 64-bit only
  - 7 SP1 Enterprise , 64-bit only
  - 2012 R2, Standard
  - 2012, Standard
  - 2008 R2 (SP1 or later), Standard or Enterprise, 64-bit only
  - 2008 (SP2 or later), Standard or Enterprise, 64-bit only

### Internet Connection

An Internet connection is initially required to install Axys and to entitle users through the Advent Direct Admin portal for Firm Administrators. After that, an Internet connection is optional and required only for completing other tasks (such as password resets) in the Admin portal.

<b>Other Software</b>	<p><b>Axys Installs This Required Software:</b></p> <ul style="list-style-type: none"> <li>■ Microsoft.NET Framework 4.5</li> <li>■ Visual C++ Redistributable for Visual Studio 2012</li> </ul> <p><b>You Can Install This Additional Software:</b></p> <ul style="list-style-type: none"> <li>■ Microsoft Office <ul style="list-style-type: none"> <li>■ 2013, Professional, 64- or 32-bit</li> <li>■ 2010, Professional, 64- or 32-bit</li> <li>■ 2007, Professional</li> </ul> </li> <li>■ <b>Required: Microsoft Excel</b> <ul style="list-style-type: none"> <li>■ 2013, Professional, 64- or 32-bit</li> <li>■ 2010, Professional, 64- or 32-bit</li> <li>■ 2007, Professional</li> </ul> </li> <li>■ Adobe Acrobat XI, X, or 9 <ul style="list-style-type: none"> <li>■ If you generate PDF output through scripts, you must install Adobe on the server. Otherwise, this software is optional.</li> </ul> </li> </ul>
<b>Hardware</b>	<p><b>Your System Must Meet These Minimum Requirements:</b></p> <ul style="list-style-type: none"> <li>■ 2.5+ GHz Intel/AMD x86 architecture dual-core processor, minimum</li> <li>■ 4 GB RAM, minimum. For details, see “Axys Hard Disk Capacity Guidelines (in MB)” on page 4.</li> </ul>

## User Workstations

<b>Operating System</b>	<ul style="list-style-type: none"> <li>■ Microsoft Windows <ul style="list-style-type: none"> <li>■ 8.1, Professional, 64-bit only</li> <li>■ 8, Standard, Professional, or Enterprise, 64- or 32-bit</li> <li>■ 7 (SP1), Professional, Enterprise, or Ultimate, 64- or 32-bit</li> </ul> </li> </ul>
<b>Internet Connection</b>	<p>An Internet connection is always required on the workstation for users to open and log into Axys.</p>

## Other Software

### Axys Installs This Required Software:

- Microsoft.NET Framework 4.5
- Visual C++ Redistributable for Visual Studio 2012

### You Can Install This Additional Software:

- Adobe Acrobat XI, X, or 9
  - If you manually save files or report output to PDF, you must install Adobe on the workstation. Otherwise, this software is optional.
- Microsoft Office
  - 2013, Professional, 64- or 32-bit
  - 2010, Professional, 64- or 32-bit
  - 2007, Professional
  - **Required: Microsoft Excel**
    - 2013, Professional, 64- or 32-bit
    - 2010, Professional, 64- or 32-bit
    - 2007, Professional

**NOTE** Microsoft Office 2007 users may experience problems using Excel macros. See KB Article [1300010](#), “Using Excel 2007 with Axys Release 3.7 and Later and Advent Portfolio Exchange Releases 2 and 3.”

## Hardware

### Your System Must Meet These Minimum Requirements:

- 2.5+ GHz Intel/AMD x86 architecture dual-core processor, minimum
- 4 GB RAM, minimum

## Axys Hard Disk Capacity Guidelines (in MB)

In addition to the 24 to 25 MB of hard drive space required for Axys program files, hard drive space is required for Axys data files that store portfolio and system information. Many variables affect the size of your data files, such as the number of portfolios, transaction volume, the number of securities, pricing frequency, etc. This table is intended only to provide a guideline for planning your hardware requirements based on two key variables—the number of portfolios your firm manages and the level of transaction activity. The values in this table reflect three years of portfolio and system data, and should be adjusted accordingly to accommodate your historical data and hardware purchasing time frame.

Number of Portfolios		50	100	250	500	1,000	5,000
	500	14	30	80	160	300	1,600
Annual Transactions Per Portfolio	1,000	30	60	160	300	600	3,000
	1,500	44	100	240	500	1,000	5,000

When considering hardware upgrades, consult your Advent representative for specific questions. But in general, applying upgrade resources to hardware is most advantageous in this order:

- Application/File Server disks
- Application/File Server CPU and memory

## Compatible Advent Products

Advent Product	Release
Advent Browser Reporting for Enterprise Users	3.8.5
Advent Corporate Actions	3.8.5
Advent Direct Investor Management	
Advent General Ledger Exchange	15.2, 2.6
Advent Partner	7.3
Advent Revenue Center	15.2, 15.1, 14.2, 14.1
Advent Report Writer Pro	3.8.5

Advent Product	Release
DataExchange	3.0.1
Dataport	3.8.5
DTCC Interface	3.8.5
Interactive Data Interface	3.8.5
Moxy	15.2, 15.1, 14.2, 14.1
Rex	3.8.5
Settlement Reconciliation	3.8.5

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## Key Supported Product Changes in AxyS Release 15.2

This table shows highlights of the Microsoft products that this release supports and how that support has changed since the previous release. For details about specific machines and features, see individual sections in this document.

	Adds Support For	Maintains Support For	Drops Support For
<b>Servers</b>			
Operating System		<ul style="list-style-type: none"> <li>■ Windows Server 2012 R2</li> <li>■ Windows Server 2012</li> <li>■ Windows Server 2008 R2</li> <li>■ Windows Server 2008</li> </ul>	
Internet & Browser	Starting in release 15.2, AxyS requires an Internet connection for installation and administrative tasks.		
<b>Workstations</b>			
Operating System		<ul style="list-style-type: none"> <li>■ Windows 8.1</li> <li>■ Windows 8</li> <li>■ Windows 7</li> </ul>	
Other Software			
Internet & Browser	Starting in release 15.2, AxyS requires an Internet connection for installation and administrative tasks.		