

UPGRADE & CUMULATIVE HOTFIX OVERVIEW

Keep your Advent investment management technology updated and your business running smoothly.



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INTRODUCTION

Investments are inherently risky. Your investment technology, however, should not be. We offer Advent Upgrade & CHF services to keep your business updated and running smoothly.

As an extension of your team, we want what's best for your office. That's why we believe consulting should consist of three core values:

HONEST - Client relationships are built on trust. That's why we're sincere in every part of our business.

SAVVY - Our experts have diverse backgrounds and decades of experience using many industry platforms. We pride ourselves on giving you a solution, an explanation, AND the time to ensure everything works properly.

UN-BIASED - We don't answer to any vendors. Our recommendations are based on what you actually need.

With the right preparation and expectations, we can set ourselves up for a successful upgrade process...

UPGRADES: CHECKLIST

- ✓ Define application(s) to be upgraded.
(APX, Rev. Center, etc.)
.....
- ✓ Provide version(s) to version(s) info.
(APX 18.2 to APX 21.1)
.....
- ✓ Account for any applications that need to be
integrated.
.....
- ✓ Meet to define who will own each process.
.....
- ✓ Submit request to build out new servers to IT (internal
or 3rd party).
.....
- ✓ Ensure servers mimic current environment and include
updated OS, SQL, & other system requirements.
.....
- ✓ Decide who will handle Microsoft SQL installation. We
prefer to do it, but it's up to you.
.....
- ✓ Receive new environment connection from IT once it's
available
.....
- ✓ Schedule the test and production upgrades. We
recommend choosing a weekend for production
upgrade and then working backwards from that.
.....
- ✓ Hold Project Kickoff Meeting to discuss any questions or
concerns about the upgrade.
.....

UPGRADES: WHAT TO EXPECT

FUNCTIONAL TESTING

We will conduct functional testing of the applications after both the test and production upgrades.

Clients will test their applications after each upgrade, especially custom reports, automation, and integration.

CLIENT TESTS

NO PARALLEL PROCESSING REQUIRED

Upgrades do not require parallel processing. Users will be on the current version one day and the upgraded version on the next business day.

We will provide troubleshooting and support for issues that might arise during and after installation/upgrade for Advent products.

TROUBLESHOOTING & SUPPORT

CLOSE-OUT MEETING

We'll hold a Client Close-Out Meeting at the end of the Go-Live week to make sure all parties are satisfied with the upgrade.

UPGRADES: STEPS TO SUCCESS

We have a tried and tested 4-step process to effectively upgrade your Advent investment technology.

1

- 1 Test & 1 Production Upgrade
 - Work out any issues
 - Expose client to new environment
 - Test done 3-5 weeks prior to upgrade
 - Takes 1-2 days over a weekend

- Update Automation & Integrations
 - Update pathing and server references
 - Assist holistically (Advent + more) with testing integrations

2

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- Training & Workflow Reviews
 - Walk through changes and new features
 - Held during weeks between test and scheduled production upgrade

- Go-Live Support
 - Monday after production upgrade
 - Resolve any issues with IT & Advent
 - Support will go beyond Monday if problems persist

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CHF: MONITORING & INSTALLATION

The CHF (Cumulative Hotfix) is an update or patch for your current Advent software release (unlike an upgrade, which moves you from your current release to a new release). An example of an implemented fix by a CHF is APX 21.1.3: SSRS Reports Take Longer than Expected to Complete when Run at the Same Time. This fixed a problem clients were having when running SSRS Reports for a large amount of portfolios. It was fine running reports the first time, but anything after that took an unnecessary amount of time.

The goal of this service is to keep you current with the newest CHF release version throughout the life of your Advent product's mainstream support. We allow you to maintain your necessary due diligence without investing additional time and resources.

Read on to see what's included in the CHF service and what isn't...

CHF: WHAT'S INCLUDED & WHAT ISN'T



Collection & analysis of updates from Advent Community

Package details associated with releases

Communicate findings for your consideration

Prepare server environment for installation

Backup database

Run installer

Reboot server

Test functionality



An upgrade of any Advent products

Advent products that do not have CHF's associated with them

Custom solutions that aren't maintained by Versoft in your environment

OS, SQL, or any other software patches, updates, etc.

Troubleshooting problems unrelated to CHF update

CONCLUSION

This overview was created to help keep you informed about your Advent products.

If hiring us to help is the right decision for your business, great! If not, that's okay too. Our hope is that you found this Overview valuable and useful. Navigating the investment technology space is already hard enough. Our aim is to make it less stressful with honest, savvy, and always un-biased recommendations.

If you would like to learn more about how we can assist you, please reach out to us via one of our many channels:



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