

Enhanced User Experience with Intuitive UI for Financial Services Provider



ATTENTION. ALWAYS.



aspire 
SYSTEMS
attention. always.

THE CUSTOMER

Our customer is committed to creating a better wealth experience for Financial Advisors and their clients across America. For years, they have helped independent financial advisors provide better client experiences. Working with leading academics, they build strategic Asset Class portfolios with the goal of harnessing the power of global markets and keeping clients focused on what matters most. They provide Investment Management, Business Management and Practice Development to a select group of America's most knowledgeable and forward-thinking independent financial advisors and their clients.



THE CHALLENGE



The client came to us with the requirement of a more efficient and more user friendly system.

They were facing the following challenges:

- 1 The customer's existing system's UI had become outdated. The clients of the customer had to spend a lot of time trying to add new pages when required.
- 2 The system was time consuming and not very user friendly.

THE SOLUTION



Aspire designed an intuitive UI for the new system making it mobile and tablet supportive as compared to their legacy system. The application built was made a gateway to both the investor management portals so it now needs a single login.



- 3 The existing CMS made content creation quite difficult for the admins.
- 4 Also the Customer had two platforms for Investors management. The advisors had to login to each of this separately.

Aspire's work involved building a system for Content Management and User Management. We designed an intuitive UI for the new system making it mobile and tablet supportive as compared to their legacy system.

- 1 Drupal Content management system was used in the setting up of the application for the customer.
- 2 Multiple templates were created in Drupal to create content easily. Views were setup that lists all the content based on the categories and sub categories. Some content also had images as part of the content which was also integrated.
- 3 Using the templates the admin was able to create any number of pages much more easily and in less time.
- 4 Solr was used for setting up content and document related search, categorizing the results as web based and document based.
- 5 The User management system was built integrating into two third party vendors. Integration required that we work with multiple vendors. REST API and SAML integration was used to connect to the third party vendors.
- 6 The application which we built was made a gateway to both the investor management portals so it now needs a single login.

Highlights:

Using Solr we created categorized search options for both documents and web.

BUSINESS BENEFITS

Broadly, the customer achieved the following outcomes:



The Content management system that we built brought in a cleaner UI and better user experience.

From the business side, creating content was made a lot easier and faster than before. In the legacy system every page was created right up and inserted as needed. In the newer improved system, we setup multiple templates for content layout which made content creating from admin panel much easier.

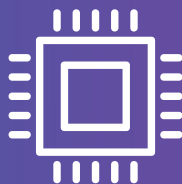


Based on the new template, we were successfully able to migrate all the content from the legacy system and accommodate it into the new templates with HTML modification as required.

The newer system made User management much easier for the customer since all actions pertaining to the user was brought into one system. It also cleared off lots of inconsistencies that were there in the legacy system.



TECHNOLOGY SNAPSHOT



Web Server: Apache 2.4

OS: Linux (Red Hat Enterprise)

Programming: PHP 5.6

Database Engine: MySQL 5.6

CMS Framework: Drupal 7

Designing Language: HTML/CSS

Scripting Language: JavaScript, JQuery, JQuery UI

Caching: Memcache 1.4.24

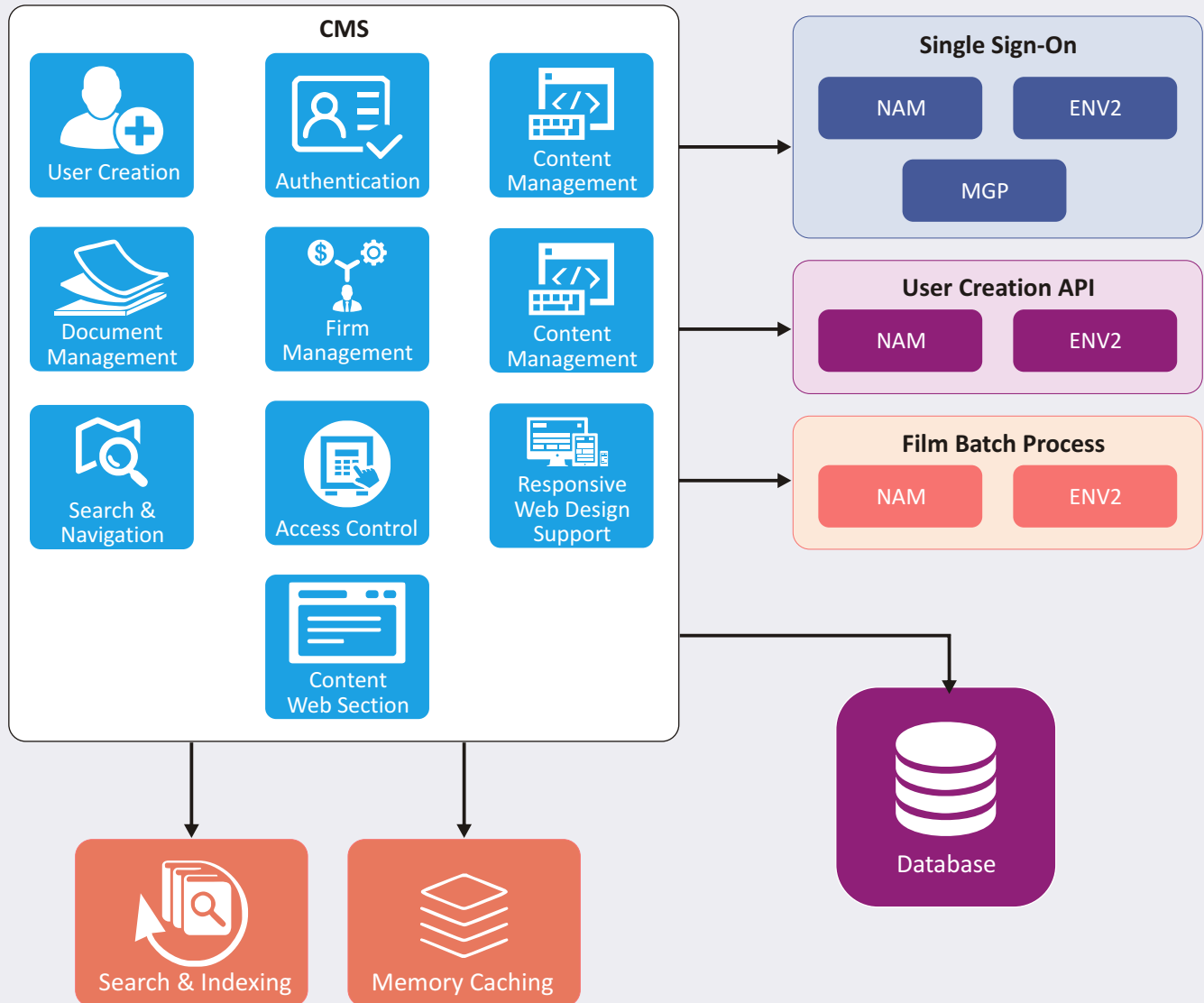
Solr: Apache Solr 5.2.1

SITUATION COMPARISON



The advisors using the client's portal have ease of access and the process is more efficient and less time consuming.

High Level Architecture Diagram



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ABOUT ASPIRE

Aspire Systems is a global technology services firm serving as a trusted technology partner for our customers. We work with some of the world's most innovative enterprises and independent software vendors, helping them leverage technology and outsourcing in our specific areas of expertise. Our core philosophy of "Attention. Always." communicates our belief in lavishing care and attention on our customer and employees.

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