

**Client**

A leading solutions provider to financial institutions and investment professionals

**Goal**

Bring the power of analytical tools to mobile devices.

**Business Impact**

60% of the financial advisors commenced using the mobile application within 90 days of launch.

## The power of mobility

*Iris created a mobile application for financial advisors to practice their trade seamlessly between their office systems and their mobile devices.*

**Overview**

Iris developed a mobile application for a leading provider of financial data and technology. The application, engineered by Iris, serves as an easy-to-use tool for financial advisors and helps in the exchange of key financial data between the advisor and the investor.

This application displays custom reports created by accessing the client's financial information calculation engines. The application is extremely versatile and allows financial advisors the capability of displaying user blends, custom portfolios and manager performance charts. A unique feature of the application is that it also allows for annotating financial charts with comments as per FINRA guidelines.

**The challenge**

Our client is a technology provider and strategic partner to premier financial services firms. As a leader in the aggregation and distribution of data pertaining to portfolio and fund manager performance, IIS's investment manager research and selection products give users access to the most comprehensive data source for separate account information.

Our client has been collecting and distributing performance data over the past few decades. In the past, the primary access to this data has been through two web portals. Financial advisors wanted an iPad application that would allow them to harness the power of our client's analytical tools while on the move. The ability to deliver an application in a new platform that would work in concert with their legacy applications and infrastructure was a significant challenge.

**The solution**

To address the primary task of providing an intuitive presentation to the data delivered on the iPad, Iris led the engagement by conceptualizing the user interface paradigm that was unique to our client. The application has been designed to extract performance data from a number of backend applications and translate the same as reports that formed an integral part of the financial advisor's presentation to the investor. This facility provided on the iPad makes it extremely convenient for financial advisors to use this application as a companion in an advisor-investor discussion. In addition, Iris designed, developed and deployed the web services required for data extraction and calculation for the mobile application UI/blends.

## Tools & technologies

iOS, Objective-C, SQL Lite, HTML 5, CSS, Javascript, SVG, HighCharts JS

## Technical highlights

- Extensive charting controls: Drill-down charts, slider time control for charts
- iOS special features: Zoom-in, zoom-out, pinch, finger-flip 2 finger-flip, tap one, tap twice, etc.
- Web services that interface with legacy applications and mobile clients
- Utilities that allow for transferring preferences, frequently viewed graphs, etc from the web portal to the mobile client.
- Average time for loading on mobile: 1 second

## The Iris advantage

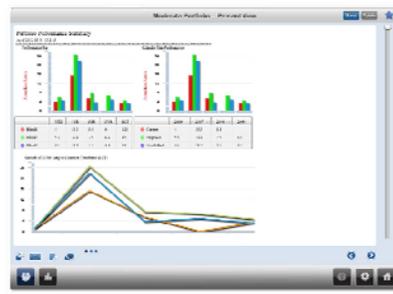
**Vision to Reality:** Iris formed a cross-functional team from business, marketing and IT to collaborate in requirements planning, user interface design and realization of the application.

**Speed to market:** User interface design and approval in less than 5 weeks, application delivered in 4 months.

**Execution excellence:** Iris made extensive customizations to the standard HighCharts libraries and the application allows the user to create charts and graphs for unlimited permutations of portfolios and create blends on the fly.

**Predictable paybacks:** The project was completed at 97% of budget.

**Collaborative problem solving:** Iris worked with client technology personnel to ensure that technical requirements in a low latency, light weight, complex graphic application context were translated effectively in implementation.



## About Iris

Iris ([www.irissoftware.com](http://www.irissoftware.com)) is a professional software services organization providing its customers with high-quality, cost-effective solutions and developing mutually beneficial relationships. Iris does this through comprehensive solution offerings with best-of-breed technologies, rapidly deployable solutions, flexible engagement models and proven methodologies. This allows customers to focus on their core competencies, and concentrate IT resources on projects that directly impact their bottom-line.