Collaboration is Crucial

"Almost every business activity can be made more efficient by enabling users to plan, negotiate, brainstorm, and resolve conflicts within the context of a business process. This idea of 'contextual collaboration' will replace the current model where collaboration services are largely divorced from business processes."[1] In the investment operations industry's continuous push to maximize efficiency, contextual collaboration is greatly needed within the fast-paced offices of portfolio managers, hedge funds, plan sponsors, treasury institutions, and other investment operations organizations where timely and accurate exchange of position and trade information is crucial.

About QED Financial Systems

Founded in 1987, QED Financial Systems provides integrated treasury management, fund accounting, investment accounting, portfolio management, and general ledger software solutions to many of North America's largest buy-side institutional investment organizations.

Contact Us

QED Financial Systems, Inc.
856.797.1200
www.QEDFinancialSystems.com
solutions@QEDFinancialSystems.com

Realizing the importance of real-time processing and information exchange, QED has taken a proactive approach to contextual collaboration by incorporating instant messaging, email, and data sharing agents directly into the Q2 Investment Workflow system. By deploying collaborative tools as embedded functions within Q2, QED enables customers to achieve greater levels of efficiency. Q2 users can jointly and easily address issues related to trade clearing, reconciliation, and portfolio management by instantaneously interacting with each other and sharing detailed information—within the contextual footing of their respective Q2 desktops.

Instant Messaging with Q2 Messenger™

Q2 Messenger, the messaging agent embedded within Q2, **enables users to interact and collaborate instantly with peers, counter parties, clients, and even QED support team members.** Using Q2 Messenger, an operator who needs assistance setting up a new security type, for example, can instantly contact a QED representative for support. The QED representative can provide the operator with detailed instructions, quickly and within the context of the application. The operator's productivity is not adversely affected, since the integrated instant messaging utility enables the operator to receive immediate support—without exiting Q2 to look up telephone numbers, make telephone calls, or send emails.

Qmail™ Integrated Email

Qmail is an **integrated email agent that allows users to exchange Q2 data and reports via email to or from other users, custodians, or clients directly from the Q2 desktop.** Q2 users realize the benefits of sending email and associated attachments, but they do not have to leave the Q2 application to do so. Additionally, the integrated email capabilities enable third-party organizations to send data directly to Q2 for automated import and processing.

Real-time Exchange of Working Data

Collaborative functionality allows users to attach security positions, trades, tickler notes, or other user-defined data to real-time message alerts so that the alert recipients can review, research, analyze, process, update, or report on the attached data. For example, during the reconciliation and account verification process, Q2 automatically displays any exceptions. The operator can then copy the list of exceptions, attach the list to a message, and send the message—with the attached exceptions—to another Q2 user. The recipient of the message can then directly access the actual exception data on his Q2 desktop for research, processing, and reporting. Efficiency and productivity are greatly enhanced because real, working data is shared between users in real time, which drastically reduces the time spent on the multi-user collaboration that is often needed to effectively resolve problems.

Embedded File Transfer Agent

Q2 also includes an **embedded FTP agent that provides a simple point-and-click file transfer mechanism accessible from the desktop.** The integrated FTP application facilitates universal data exchange with internal and external sources. Any data, such as trades, positions, prices, and exceptions, as well as saved .txt, .html, and .pdf files, can be easily shared with other Q2 users, clients, custodians, brokers, trading systems, DTCC, etc. by simply transferring the data files via Q2's built-in FTP agent.

[1]Cain, Matt. 2003 "Collaboration and the Evolution of the Enterprise: Improving Business Efficiencies Through Collaboration". Stamford, CT: META Group, Inc.