



THOMSON REUTERS PORTIA PROFESSIONAL SERVICES GROUP

PARTNER FOR SUCCESS



THOMSON REUTERS™

Your success reflects your vision, commitment, and know-how. Achieve even more with the right partner. Thomson Reuters PORTIA professional services helps you get more from your technology and align your technical strategy with your business. With our experience, together we can deliver lasting success.

A sound investment accounting system is at the heart of your operation. All business functions rely on its accuracy and output. Thomson Reuters PORTIA has been designed openly to support your unique requirements and to evolve with your business.

Our professional services group helps you at every stage of the journey from initial implementation to workflow optimization and system integration. Thomson Reuters PORTIA professional services offer the right combination of consulting, training and custom development to ensure that you maximize the return on your investment in technology.

Our trusted team of professionals helps you identify, evaluate and implement solutions that optimize your workflow and improve efficiency. Streamline your operations and develop best practices with our proven methodologies. Benefit from our practical expertise and technical knowledge. All of our consultants are Thomson Reuters PORTIA experts with a deep understanding of industry practices and project management. We deliver projects and solutions on time, every time.

Leverage your investment in Thomson Reuters PORTIA with skilled consulting services and custom application development. Choose from a range of Thomson Reuters PORTIA services, including product implementation and integration to workflow analysis and optimization. Our services create a streamlined operation and a solid infrastructure for your future.

IMPLEMENTATION PROJECT MANAGEMENT

Take advantage of our comprehensive product knowledge, proven project management methodology, and industry experience. With careful planning and detailed analysis, we help you save time and money. Benefit from a detailed project plan that includes a budget and detailed schedule. We provide the right people to specify, plan and implement a solution that meets your budget and exceeds your expectations. And to ensure that there are no surprises, you receive detailed progress reports every step of the way.

PROJECT MONITORING

Keep on track. Thomson Reuters PORTIA project managers understand how important it is to deliver on time and to budget. You are engaged throughout the process to ensure that everyone has the tools needed to accomplish the job. Benefit from our implementation expertise to help identify problems and potential issues. We perform a detailed critique of the implementation on completion that includes practical suggestions for improvement moving forward.

IMPLEMENTATION TESTING

Our experts perform extensive testing throughout the implementation to ensure that the system meets your business requirements and operational goals.

DATA CONVERSION AND RECONCILIATION

A crucial element in a successful implementation is the proper conversion and reconciliation of existing data to Thomson Reuters PORTIA. Our proven methodologies manage complex security characteristics, transaction history, sophisticated performance and attribution measurement information. And our specialists have established routines for data conversions, reconciliation, and quality assurance.

BUSINESS WORKFLOW OPTIMIZATION

Leverage our extensive investment management and process improvement experience to achieve optimal workflow. We design and implement enterprise-wide processes that efficiently manage business workflows. Our proven methodologies include gap analysis, detailed implementation plans, and onsite project management.

SYSTEM INTEGRATION

Thomson Reuters PORTIA is based on an open technology platform that enables a comprehensive set of integration models. Its integrated 'drag-and-drop' workflow designer, automated interface manager, XML-driven job service, a message-based publish/subscribe model, and programmatic access over COM, .NET, and Web Services support a wide range of integration needs.

OPERATIONS REVIEWS AND BEST PRACTICES

Benefit from our experience. We help you establish and implement best practices based on our considerable years of experience. Our expertise and detailed knowledge helps you streamline processes and establish best practices to save time and money and to mitigate risk.

STAFF AUGMENTATION OF SKILLED PROFESSIONALS

An extra pair of hands when you need it. If you are running short of experts or simply deluged with work, we can augment your team. Trust us to provide you with expert help when you need it, for as long as you need it.

TRAINING

Once your operations are up and running, we ensure a smooth transition to your own staff. The Thomson Reuters PORTIA Professional Services Group manages the entire education and training process, developing materials and monitoring the quality of training given to your staff. We offer standard training classes and also develop customized training modules to meet your specific needs. Our refresher training courses ensure you get more value as your business develops and requirements change.

Reliable. Secure. Proven. PORTIA

To learn more contact:

North America:

+1 617 856 2700

EMEA:

+44 (0)20 7542 6960

Hong Kong:

+852 3762 3300

portia@thomsonreuters.com

tf-portfolio solutions.net

