

## PROJECT MANAGER FACT SHEET

### THE PRACTICE MANAGEMENT SYSTEM THAT MAKES EVERYONE A PART OF THE TEAM

As a workflow hub, Thomson Reuters Onvio Project Manager combines all the tools and resources you need in one place, to ensure that you're in complete control and managing your practice efficiently and effectively. But its centralized database and real-time synchronization ensure that you and your staff are always on the same page—no matter where, when or how you're all working.

#### The tools your staff needs

With Onvio Project Manager your staff can manage their own responsibilities, thanks to the ability to:

- Identify the tasks and time required to perform work
- Track due dates
- Control project workflow
- Manage progress for all your firm's projects
- Manage project list and status from the Active Projects widget

#### The efficiency to manage every project with ease

From managing partners to seasonal staff, Onvio Project Manager helps every member of your team at every turn, with the ability to:

- See an elevated view of all work in your office
- Save time with project templates that hold default information for project creation
- Control the way recurring projects are generated with flexible project generation
- Review time and receivables quickly with onscreen reporting by day, week, month or custom date range
- Easily access project documents stored in project-specific folders when used with Thomson Reuters Onvio Documents
- Assign projects and tasks to staff based on the staff assigned to the client, specified staff on the template or assigned on a project-by-project basis
- Track time, and bill by project when using Thomson Reuters Onvio Time and Billing

### DISCOVER ONVIO PROJECT MANAGER

See for yourself how Project Manager can help move your firm forward into a connected and profitable future.

Visit [DTMax.ca/en/Onvio/Project-Manager](https://DTMax.ca/en/Onvio/Project-Manager), or call 1 866 653-8629 to speak with a representative.

### Six good reasons firms use the cloud

A 2015 study by technology consulting firm NMGI and Insight Research Group found that almost 60 percent of survey participants use some form of cloud services. Here are six reasons why.

1. **Accessibility**—Today's clients and staff expect (and demand) access to their personal and financial information online, anywhere, on any device.
2. **Connection**—In an over-scheduled world, the tools of the cloud (portals, websites, etc.) make it convenient for your staff and your clients to stay in touch.
3. **Efficiency**—Cloud technology improves efficiency in the firm and eases the burden of software and hardware maintenance.
4. **Collaboration**—Working in the cloud enables your firm to work with clients in a manner that's familiar to them (e.g., using secure logins to access files online).
5. **Security**—To mitigate security risk, cloud providers offer a level of technical and staffing security that most firms can't maintain locally.
6. **Expertise**—Ever since Thomson Reuters first made the CS Professional Suite® available in the cloud in the late 1990s, we've been a profession leader in helping tax and accounting firms maintain a virtual presence.

Thomson Reuters Onvio. Connections that move you forward.  
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