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THOMSON REUTERS

Onvio Documents

Thomson Reuters

<https://tax.thomsonreuters.com/onvio/documents/>

From the 2018 reviews of Document Management and Documents Storage Systems for accounting firms.

Onvio Documents is part of Onvio Firm Management from Thomson Reuters. Onvio Firm Management includes document management, time and billing, and online client collaboration capability. Completely cloud-based, Onvio also offers seamless integration with UltraTax CS. Well-suited for firms of any size, Onvio Documents is a great choice for those looking for the flexibility of a completely online document management application.

Onvio offers a free mobile app for both Apple and Android devices, with the mobile app offering the same functionality found in the online application, including access to all stored documents, the ability to send documents to a variety of recipients, and the ability to use a camera to scan and upload documents.

Onvio Documents supports numerous document types including audio and image files, and the product also allows users to create the folder structure that works best

for their needs, with the option to create folder templates for simplified folder setup.

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installing Onvio Link, which allows users to print documents directly to Onvio Documents from locally installed applications as well as from websites and PDFs. Onvio Link can only be installed on computers that are currently running on a Microsoft Windows platform. Users should also be aware that Internet Explorer version 11 or higher is required in order to print from the locally installed applications.

Seamless integration with other Thomson Reuters applications such as UltraTax CS allows users to easily send documents directly to Onvio Documents through the print driver as well.

Offering true document management, Onvio Documents includes the ability to easily access and review client folders to ensure all necessary source documents are in the client folder. If a document is missing from the file, users can easily request the document directly from the client. Onvio Documents also manages all requests made, so users will be aware of all outstanding documents requested, as well as when the document has been received.

Onvio Documents offers excellent search capability, with users able to search both folders and subfolders for the necessary documents. Security options are also available in the application, with firm administrators able to create user groups, with new users added to a specific group. The Share Folder option allows users to easily share select folders with colleagues as well as clients, provided that the correct permissions have been assigned to the file or system user. Users can also edit files, with the option to save both versions of the file, or save only the edited file.

Onvio Client Center integrates with Onvio Documents to provide easy collaboration between firm users and their clients. Users can determine which clients have access to the Client Center and can set up access when entering client information. Once clients receive an email inviting them to sign up, they will create their own user

name and password to gain access to the Client Center. The Client Center portal is bi-

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Users can also choose to utilize Thomson Reuters personnel when implementing the application, which helps with analysis, documentation, date conversion, setup, and training.

Onvio Documents is a solid document management solution for firms using other Thomson Reuters applications. Part of Onvio Firm Management, Onvio Documents offers easy online document management capability, while also integrating with other Onvio Firm Management applications. Onvio pricing is subscription-based, with pricing dependent on the number of users. All product support is included in Onvio's pricing, with users able to contact Thomson Reuters directly for a quote.

2018 Rating – 4.75 Stars

Firm Management

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