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part of Onvio Firm Management from Thomson Reuters. Along with document management, Onvio Firm Management also offers complete time and ...

Mary Girsch-Bock • Sep. 16, 2019

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Onvio Firm Management – Documents

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<https://tax.thomsonreuters.com/us/en/onvio>

From the 2019 reviews of [Document Management and Storage](#) systems for accounting firms.

Designed for accounting firms of any size, Onvio Documents is part of Onvio Firm Management from Thomson Reuters. Along with document management, Onvio Firm Management also offers complete time and billing and online client

collaboration capability using a flexible, online interface, and offers direct

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Onvio Documents supports multiple file formats including both audio and image files. The product uses a flexible folder structure, so users can create the structure that works best for their firm and their clients. Onvio Documents also allows users to create folder templates that makes it easy to setup new folders. All documents stored in Onvio Documents are organized by category, with tabs available for each category, which include All Documents, Client Documents, Firm Documents, My Documents, and Recent Activity. Users can also access the recycle bin from within Onvio Documents.

Onvio Documents allows users to scan documents directly into the application; working with any Twain compliant scanner. Multiple documents can be scanned simultaneously, and OCR capability in the application provides easy document search in the future. Documents can also be added to Onvio Documents from a variety of third-party document storage applications such as Google Drive, Dropbox, or Box.

Onvio Documents also allows users to review client folders to ensure that all requested documents are in the folder. If a document is missing, users can create an email from the document management application requesting that the client upload the document directly to Onvio Documents, eliminating the need to send confidential information via email. Users can view any requests made under the Requests tab, allowing them to keep track of any documents that have been requested and are still outstanding.

Onvio Documents offers easy document search capability, with users choosing the category they wish to search. Choosing a category will display all the documents in that category, where users can then enter specific search terms such as client name or file type. Onvio Documents also offers a Share Folder option that allows users to store documents that will be shared with colleagues and clients, provided that adequate file sharing permissions have been established with the recipients. Users

also have the option to edit any accessed file, with an option to save a new version of

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Onvio Documents, along with Onvio Firm Management offers complete integration with UltraTax CS, allowing firms to request and receive client source documents. Those using UltraTax CS can also send documents directly to Onvio Documents by using the included print driver.

Onvio Documents users have access to Thomson Reuters Help and How-To Center, where instructional articles and product videos are available. Getting started instructions are provided for all Thomson Reuters applications, and users can access the product knowledgebase as well. Product support is available via telephone, email, or chat, with support available during extended business hours.

Onvio Documents is a solid document management solution that is part of Onvio Firm Management. Well-suited for firms of any size, Onvio Documents is an excellent solution for firms that wish to implement online document management capability in their firm. Onvio Firm Management, including Onvio Document also offers excellent integration with other Thomson Reuters applications. Pricing for Onvio Firm Management is on a subscription basis, with all product support included in the cost of the subscription. Those interested can view a short informational video and contact Thomson Reuters directly for a price quote for their firm.

2019 Rating – 4.75 Stars

Firm Management

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