

Avii Document Management System Guidance

Avii customers can store files natively on Avii Workspace in Microsoft® Azure Cloud.

Avii customers can store up to 3 GB per Licensed User at no additional fee above the Avii Workspace License Fee, and can pool this storage allowance across all Licensed Users in their firm.

Avii customers can pay for additional storage above that limit at a rate of \$0.25/GB per month, shared across their firm, billed monthly.

Avii encourages firms to use Microsoft SharePoint or Box as their primary Document Management System. Avii Workspace has full integration with Microsoft SharePoint® and Box®. Documents exchanged across the Avii Client Workspace and Employee Workspace can be viewed and managed in Avii Workspace while simultaneously being stored in MS SharePoint or Box. In either of these scenarios, the documents are never stored in Avii, but are seamlessly accessible via all relevant Avii Workspace tools and workspaces by both accounting firm users and their client users, based on permission settings. The storage location of documents is not known to either accounting firm users or client users. Their user experience is identical regardless if your firm elects to store documents in Avii or in a 3rd party document management system, including Microsoft SharePoint or Box.

Avii customers that use Microsoft SharePoint as their primary Document Management System can take advantage of the DMS storage they already pay for in their Microsoft E5 licensing. This also allows accounting firms to utilize the rich document retention policies and procedures included in MS SharePoint. Documents that are removed via MS Share point's document retention tools are no longer accessible from the Avii Workspace.

Similarly, Avii customers who use Box as their primary Document Management System can leverage their Box licensing and features.

Additionally, Avii customers can leverage the Avii Workspace API to interact with other DMS systems where applicable.

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