WORKFLOW MANAGER
Orchestrate Your Tax Processes

Thomson Reuters ONESOURCE™ WorkFlow Manager is a high-performance web solution driving your comprehensive tax and compliance processes. This configurable solution helps ensure timely product completion with tracking features while providing secure access anywhere, any time. Through a powerful work flow engine, the solution delivers intelligent tax automation, improves your control, and heightens visibility so you can make more strategic decisions and reduce risk. Powering the solution are the calendar, filing and entity management features.

ONESOURCE CALENDAR

Automate due-date monitoring and track tax-related activities

Thomson Reuters ONESOURCE™ Calendar enables you to manage, publish, and track all of your external and internal obligations in one place that can be accessed through the Web. It provides a single multiyear database of due dates, payments, extensions, filings and projects.

Customized views and reporting features allow you to quickly determine the status of outstanding items and help bring attention to items that need your immediate review. Event reminder notifications also help you meet your obligations.

Pre-populated tax events

ONESOURCE Calendar provides robust content that is available by geographic region to ensure you can access information you need. The regions available include: North America; South & Central America; Europe, Middle East, and Africa (EMEA); and Asia Pacific (APAC). In addition to the pre-populated content, ONESOURCE Calendar gives you the ability to enter custom information and dates.

The pre-populated event content for statutory filings includes names, addresses and due dates from various taxing authorities such as:

+ Federal corporate income tax
+ Federal partnership income tax
+ Federal trust tax
+ State corporate income and franchise tax
+ State partnership income tax
+ State trust tax
+ Sales and use tax for state and local filings: monthly, quarterly and annually

Certified mailers

With ONESOURCE Calendar, you can print US-certified mail and return receipt forms for all of your scheduled events, right from the calendar. You can also print US-certified mailers in bulk and then track the certified mail process online.

FILEROOM

Establish a paperless office

Finding the information and documents you need has never been easier. The FileRoom feature of ONESOURCE WorkFlow Manager can help improve your document management efficiency while reducing the costs and time spent on your document processes.

FileRoom gives you the ability to manage and store all of your documentation online in one location. This component enables you to organize, edit and secure your documents. It will improve your organization's communication by enabling you to efficiently share, route and review files. FileRoom gives you access anytime and anywhere so you can easily control and monitor your work at the office, at home or on the road.

FileRoom also enables you to:

+ Customize drawers, index structures and reports so files can be easily located
+ View real-time, up-to-the-minute information on the status of all documents
+ Quickly find the documents you need using search/index fields and keywords
+ View detailed document audit trails to monitor every action taken with a document
+ Reduce your operating costs and enjoy unprecedented cost savings by eliminating paper files, storage fees, postage and manual administrative tasks
+ Restrict document viewing, annotating, editing and other functions by user groups, drawers or even specific documents—for example, by document type

ENTITY MANAGER

Centralize the management of your entities

The Entity Manager feature of ONESOURCE WorkFlow Manager allows you to manage and store a centralized database of entity information. It enables you to capture and manage every detail of your corporate data, including owners, contacts, geographic locations, tax identification numbers, intercompany transactions and more. Entity Manager also allows you to create custom data fields for any additional data. Tree view and search filters enable you to quickly find the entity information you need.

Increased visibility of your organization's multiple divisions, branches and partnerships will improve your business planning and help you make more informed decisions. Entity Manager features OrgPlus® charting functionality in addition to the standard charting and tree view. This functionality enables you to effortlessly produce custom charts and more clearly visualize your organization.

In addition to the broad range of on-screen graphic controls, the professional charting feature can print and export in a number of formats (Microsoft® Office Excel, PowerPoint, or PDF and wall charts). This allows you to quickly share information with colleagues and use charts in presentations.

Entity Manager will help you reduce economic risk. Since corporate data is stored centrally, you can easily find the information you need. Access to entity data can be controlled by groups and by areas (such as banking, board members and tax registrations) to ensure your data is not compromised.

SECURITY

You can rest assured that your information is in the safest location possible. Built-in security and automatic back-up capabilities safeguard against corrupted or lost data. The system uses a sophisticated network and data center security technologies to protect all your documents and data.

UNPRECEDENTED CONTROLS

ONESOURCE WorkFlow Manager provides access to drawers, workflow and documents that will be defined and configured during your implementation. Our granular approach to security lets you decide the appropriate level of access for each staff member and gives you the option to lock down confidential documents. In addition, a complete audit trail is maintained for all document and workflow activity.

ONESOURCE WorkFlow Manager gives you the improved visibility, control and efficiency you need to effectively manage your tax processes and reduces risk in an ever-changing environment.

CONTACT US TODAY

✉ onesource.mena@thomsonreuters.com

The intelligence, technology and human expertise you need to find trusted answers.

the answer company™
THOMSON REUTERS®