

# WORKFLOW MANAGER



## ORCHESTRATE YOUR TAX PROCESSES

ONESOURCE WorkFlow Manager is a high-performance, web-hosted solution that helps you streamline your entire tax and compliance processes. It provides you with real-time visibility into your project status, resourcing and compliance deadlines, enabling better strategic decisions and reduced risk. This solution provides intelligent task automation through a powerful workflow engine.

ONESOURCE WorkFlow Manager integrates powerful components such as ONESOURCE Calendar, FileRoom, and Entity Manager to give you complete control of your operations and optimise your tax processes.

### ONESOURCE CALENDAR

#### Automate Due Date Monitoring and Tracking of Tax-Related Activities

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

#### Pre-populated Tax Events

ONESOURCE Calendar provides robust content that is available by geographic region to ensure you have access to the 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.

### 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 enables you to:

- Customise 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

#### Centralise the Management of your Entities

The Entity Manager feature of ONESOURCE WorkFlow Manager allows you to manage and store a centralised 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.

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 be 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 centre security technologies to protect all your documents and data.

### UNPRECEDENTED CONTROLS

ONESOURCE WorkFlow Manager provides access to drawers, workflow, and documents which 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.

### IMPROVE YOUR DATA MANAGEMENT PROCESS

#### Control your data collection efforts more efficiently

The DataFlow application of ONESOURCE WorkFlow Manager gives you the control you need to manage your data collection efforts more efficiently and obtain higher-quality information. DataFlow allows you to develop customised web-based templates. You can use your existing Excel-based workpapers or tax packages and enhance them by utilizing DataFlow's unique functionality.

DataFlow is integrated with ONESOURCE WorkFlow Manager to automate your data management activities. This solution gives you the ability to monitor and track tasks, as well as store and manage all your documents.

Benefits of DataFlow are:

- Lets you automate how you gather, use, store and reuse data
- Eliminates the need for manual consolidation, making data available for global retrieval, consolidation, and reporting directly from Excel
- Allows you to standardise and organise workpapers and process more accurate information
- Enables you to track the status of data requests and ease the communication process for data providers
- Helps you to reduce human error by eliminating the need to rekey data
- Extracts the maximum value from your data.

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