ONESOURCE WorkFlow Manager is a high-performance, web-hosted solution that helps you manage your department and drive your tax and compliance processes. This comprehensive project and document management solution improves your control and operational efficiency. ONESOURCE WorkFlow Manager provides the visibility you need into project status, enabling you to make more strategic decisions and reduce risk.

ONESOURCE WorkFlow Manager provides intelligent task automation through a powerful workflow engine. Tracking and reporting features help ensure timely project completion. This solution is fully configurable to meet the specific needs of your tax department. ONESOURCE WorkFlow Manager provides secure, remote access from anywhere at any time.

ONESOURCE WorkFlow Manager is integrated with powerful components that give you control of your operations and tax processes, including ONESOURCE Calendar, FileRoom, and Entity Manager. These components work together and enable you to achieve tax process optimization.
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.

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 help you meet your deadlines.

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.

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 U.S. certified mail and return receipt forms for all of your scheduled events, right from the calendar. You can also print U.S. certified mailers in bulk and then track the certified mail process online.
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

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.

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 center 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.

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 for more information about this innovative solution.
GLOBAL SOLUTIONS

No matter where you do business today, a global perspective is essential to achieve success. That’s why Thomson Reuters has focused on developing tax software and services that function globally and enable customers to maintain accurate and seamless compliance with increasingly complex international tax laws and accounting rules.

LOCAL SOLUTIONS

ONESOURCE from Thomson Reuters provides the localized resources and expertise you need to manage your taxes in numerous jurisdictions worldwide – and we continue to expand. Bridging important language, currency, and regulatory gaps, our local solutions and software can help you smoothly interact with the tax requirements and accounting practices in your specific location.