

ONESOURCE WORKFLOW MANAGER

WEB TRAINING SESSIONS

Recommended Training Sequence

| ONESOURCE platform* | |
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| Introduction to ONESOURCE platform (Recorded-only) | ONESOURCE platform is the launching pad for all of your ONESOURCE applications. This session will discuss many convenient tools and options of ONESOURCE platform. You will learn how to access your applications, how to categorize and display relevant information about each of your products on custom pages, and how to utilize the various support features that are available to you. |
| Administration for ONESOURCE platform | ONESOURCE platform is the central location to set up users and access rights for your ONESOURCE products. This session will guide administrators through the process of setting up user and group level security, creating page templates to display relevant product data for each user, reviewing user and group specific data in various report formats, and configuring other productivity tools. |
| Gadgets | This session will guide you through the process of configuring available gadgets to your ONESOURCE platform. Learn how to display timely and accurate data. In addition, you will learn how to use Gadgets to change statuses, export data, hyperlink directly to your data set, print reports and much more. |

**ONESOURCE WorkFlow Manager training is offered as separate modules. However, each module should be preceded by the ONESOURCE platform sessions.*

| ONESOURCE WorkFlow Manager | |
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| Administration for ONESOURCE WorkFlow Manager | Learn how to set up groups and complete security assignments for the modules in ONESOURCE WorkFlow Manager. This session will guide administrators through the process of streamlining your security setup process and using the security reports to assist you in defining and confirming that the security setup meets your specific needs. |
| Introduction to ONESOURCE WorkFlow Manager | Join us as we introduce you to ONESOURCE WorkFlow Manager and how it can provide you the ability to view and manage all of your processes with customized Workflows and associated tasks. This course introduces the types of Workflows, all other related modules and functionality that ONESOURCE WorkFlow Manager provides to you to help manage your department. |
| ONESOURCE WorkFlow Manager – Workflows and Tasks | Join us as we cover how ONESOURCE WorkFlow Manager gives you the ability to view all associated Workflows and tasks. This course introduces the types of Workflows that are available and the differences between them. Learn about tasks and every action that can be invoked to re-route, reassign, change the status or properties of the task and even add additional tasks when needed. |
| ONESOURCE WorkFlow Manager – Workflows and WorkFlow Browser | The students will learn what the ONESOURCE WorkFlow Browser is, how to navigate in the browser, locate WorkFlow folders and underlying Workflows. Additionally we will cover all the functions and features that users can perform within designated Workflows. |

Visit the [ONESOURCE University online platform](#) to view the schedule and register for courses. Not registered for ONESOURCE University? To gain access, submit an email request to onesource.university@thomsonreuters.com. In your request, please provide your full name and corporate email address.

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| My Work | Join us as we introduce you to a mini application that is available within ONESOURCE platform. My Work allows you to see all of your task assignments without even launching ONESOURCE WorkFlow Manager. Perform your work right on your desktop, by due date, urgency, or any other criteria. Learn about available features and functionality. |
| Introduction to Rules-Based Workflows | Join us as we introduce you to Rules-Based Workflows within ONESOURCE WorkFlow Manager. This new functionality provides you the ability to create dependencies for WorkFlow tasks based upon conditions and rules that are created within the WorkFlow Template. |
| Introduction to Rules-Based Workflows – Part I | This session will cover the Rules-Based Workflows functionality. Join us as we demonstrate step by step instructions on how to build a rules-based WorkFlow template. We begin with the basics of setting up Task Categories and Roles which are underlying components of a Rules-Based Workflow. |
| Introduction to Rules-Based Workflows – Part II | This second session will build upon Part I of this series and expand your knowledge of building a Rules-Based Workflow. We begin with showing you how to add Tasks and Calendar Events to your templates. For each task you can add your own custom task fields. These fields can be used in the rule conditions if you need. |
| Introduction to Rules-Based Workflows – Part III | This third session will build upon Parts I and II of this series and expand your knowledge of building a Rules-Based Workflow. Join us as we provide more in depth details of additional features for Rules-Based Workflows. We will cover Supplemental Workflows from how to create these templates, use them for create, due date calculation and close for Primary Workflow tasks, and how to associate supplemental workflows to primary workflows. |
| Introduction to Rules-Based Workflows – Part IV | Join us as we complete the series of sessions for rules-based workflows covering areas that improve efficiencies. Learn about three time saving features: Using the export and import feature to create additional rules-based workflow templates, create many workflows using our bulk instantiation method, and finally how to define settings so ONESOURCE automatically creates rules-based workflows for you automatically. |
| ONESOURCE Calendar | |
| Administration for ONESOURCE Calendar | This session is designed to help Administrators of ONESOURCE Calendar set up the application and establish user access. Learn how to assign security permissions, define Global defaults, create custom values for drop down boxes and define field names. We will also cover how to use the various administrative elements of the program to increase your group's efficiency, setup reminder emails, and protect the integrity of your data. |
| Scheduling and Managing Calendar Events | This session is designed to help you schedule and access your Calendar data as efficiently as possible. Join us to learn how to schedule and maintain detailed information for events, utilize various ONESOURCE Calendar functionality, assign and track areas of responsibility, view upcoming events, as well as how to roll forward your data to subsequent years. |
| Adding Custom Records to ONESOURCE Calendar | This session will guide you through the process of adding your own custom data to ONESOURCE Calendar. Learn the hierarchy of database tables that contain the Thomson Reuters provided default data for holidays, jurisdictions, authorities, form/addresses, and event template records. We will cover how the record types are linked via key fields which will provide you the knowledge you need to know to build your custom Calendar data. |
| Generate Reports – ONESOURCE Calendar | This session will guide you through the Reports module of ONESOURCE Calendar. Learn how to generate Standard reports, mailing labels and Custom reports. Additionally we will teach you how to create and apply filters that are easily applied to your reports. |

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| FileRoom | |
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| Introduction to FileRoom | Join this session to learn the basics of FileRoom. Beginning with navigation techniques, we quickly move to teaching you the many ways to add paper or electronic documents to the system. We cover the basics of saving your documents including version control. We wrap up with how to quickly find and locate your documents using multiple search techniques. |
| Administration for FileRoom | Join this session to learn about Administrative features within FileRoom of ONESOURCE WorkFlow Manager. We begin with the navigation areas of FileRoom then teach you about setting up Users, Groups, and how to establish document security for both. We also cover how to add index values, update or edit the lookup lists, customizing the file cabinet, drawers, and other features. |
| Working with Documents in FileRoom | This session covers various features that are available to use with documents stored in FileRoom. We cover the basics of copying, merging, deleting, re-indexing, emailing, moving etc. for all of your ONESOURCE documents. Additionally, we cover the ability to email your documents using Outlook or Lotus Notes or directly from your FileRoom. The last portion of the class covers the expanded tools that are available for your PDF files using the ONESOURCE Add-In. |
| ONESOURCE DataFlow | |
| Introduction to ONESOURCE DataFlow | Join this session as we introduce you to DataFlow terminology, system requirements and the fundamentals of sending and receiving data requests. We demonstrate the navigation and features within the ONESOURCE system as well what your data providers receive, see, and provide for you. |
| Preparing a FormsFlow Template | Join us for this session as we teach you the process to build your FormsFlow Templates for ONESOURCE DataFlow. These custom Excel based files are used to collect data in a consistent manner from your various sources. We provide you with a step by step process and cover all of the various features and functionality that is available to help you build the files. |
| Entity Manager | |
| Introduction to Entity Manager | Join us for an introduction to the Entity Manager application of ONESOURCE WorkFlow Manager. Entity Manager allows you to store and track information regarding all of your entities, whether they are LLCs, partnerships, corporations, branches or other types. Regardless of the entity type, we will discuss each area of the application and the associated data that can be stored for each entity. |

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