Thomson Reuters Corporates Training

ONESOURCE University | Tax Training Catalog

| 2024

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Welcome

Welcome to our ONESOURCE University Training catalog!

Here at ONESOURCE University we are passionate about training. We are continuously seeking ways to enhance your training experience so you can easily find the training you need, when you need it.

In this catalog you will find a wealth of information including the type of training we offer and a comprehensive list of all our courses and certifications by product. Can't find what you are looking for? Have a suggestion on a new course or certification? If so, please let us know! We love nothing more than receiving feedback directly from our valued Clients and Partners.

We are all faced with constant change. Whether that change stems from product changes or changes within tax and regulatory compliance, at ONESOURCE University, we support and keep pace with that change. The traditional "one and done" training model is not an effective training program. Successful training programs use both instructor-led and eLearning delivery methods with a focus on interactive, real-life, and engaging content. This blended approach not only uses the most effective delivery type but is also flexible and can be tailored to each user's needs and learning preferences. We fully support a blended learning approach. Our experienced designers and experts use this approach to ensure our training content is timely, accessible, and relevant so you can continue to grow your ONESOURCE product knowledge and expertise.

Thanks for being a ONESOURCE User and Client! We hope to see you soon at ONESOURCE University! Welcome to our Corporates Training Team, ONESOURCE University training catalog.

DEANNA MCDONALD

Senior Director, Professional Services

Corporates Training Team

Welcome

Who we are

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Who we are

ONESOURCE University provides product training and certification programs that empower our corporate clients to become successful users of the ONESOURCE solution.

We know for a fact: training is a critical success factor for software implementation and ongoing proficiency. Inspired by this motto, every day our team of over 30 tax experts and learning professionals come together to design and deliver training solutions that help our corporate clients to make the most out of the software solutions they use to run their tax departments.

At ONESOURCE University, we believe that learners learn by doing, that training increases employee engagement and satisfaction, and that training is proven to help clients to realize their goals. Whether the need is a dedicated instructor-led session, a few workshop seats, a timely WebSeminar, or a subscription to our extensive eLearning library – we strive to empower all ONESOURCE users to be efficient users of our products.

In our new and modern ONESOURCE University online learning platform, you'll find training resources on a variety of Thomson Reuters global tax products for corporations, including Direct Tax, Indirect tax, Transfer Pricing, Global Trade, among others.

TAX | ONESOURCE
Global Tax Products

Direct Tax
Data and Process Management
Statutory Reporting
Indirect Tax
Global Trade

ONESOURCE University Curriculum

Direct Tax
- Income Tax RS Domestic and International
- Tax Provision
- State Apportionment
- Corporate Tax - Europe

Data and Process Management
- WorkFlow Manager
- DataFlow
- Calendar
- General Ledger Manager
- Audit Manager

Statutory Reporting

Indirect Tax
- Determination
- Indirect Tax Compliance – VAT
- Indirect Tax Compliance – Sales & Use
- Certificate Manager
- Integrations

Global Trade
- Denied Party Screening
- Global Classification
- Foreign Trade Zones
- Free Trade Agreements
- Import and Export Management
- Global Trade Content

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Learning Options

From online self-study to live remote class to face-to-face training, from basic to advanced topics – ONESOURCE University has got you covered!

We understand that the ONESOURCE corporate users have unique training needs and different learning styles. To meet the needs of our valued clients, the ONESOURCE University training curriculum is designed with modern learning methodologies and brought to you in different delivery methods that can be taken as stand-alone courses or combined in blended learning programs for an optimal learning experience.

TRAINING FORMATS

eLearning	Video-style and interactive eLearning modules covering basic, intermediate, and advanced topics, available 24/7 for self-study.
WebSeminar	1-hour live remote classes ranging from targeted areas of an application to new functionalities and features, conducted by ONESOURCE University expert trainers and strategically timed throughout the year for when it matters most. CPE included.
Workshop	University-style class with a small group or learners that gives you the opportunity to interact with other customers as you learn through scenario-based hands-on exercises. CPE included.
Dedicated	Group class exclusively delivered to your company either remotely or onsite, with hands-on exercises facilitated by an expert trainer. CPE included. Dedicated onsite courses can be scheduled with a minimum of 2 days. A combination of courses to equal 16 hours can be used.
Certification	Role-based certification exams that allow users to demonstrate a recognized level of competency within a ONESOURCE product and showcase their expertise in the marketplace with digital badges.

▶ FREE   **Courses identified with this tag are free – enroll now!**

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Learning Options

ONESOURCE University offers formal training courses.

We can offer these classes as dedicated sessions, or single seats in a specific workshop – but if you have a few people that would benefit from multiple courses, the Training Passport is a better option. Big picture, a Passport gives you unlimited access to all the live instructor-led courses and on-demand eLearning we offer, as well as certification opportunities for a particular product line.

WHICH OFFERING IS RIGHT FOR ME?

Training Passport	Provides unlimited educational opportunities to get up and running. Future content included in subscription to keep up to date with functionality and deepen your knowledge. The Training Passport is an all-access subscription to all virtual Workshops, WebSeminars, eLearning, and User Certifications. Best overall value, and a great resource to drive operational efficiency.
Workshop Seat	Great if you have a 1-2 people looking to learn a specific title. Least expensive option for single-user/single-title.
Dedicated Training	Great if you want your team to take a specific training title at the same time.

WHAT'S INCLUDED IN EACH OFFERING?

Offering	Workshops	WebSeminars	eLearning	Certifications	Dedicated (up to 10 attendees)
Training Passport	Multiple courses per product line	Full access per product line	Full access per product line	Full access per product line	n/a
Dedicated Training	n/a	n/a	n/a	n/a	Single course
Workshop Seat	Single course	n/a	n/a	n/a	n/a

PURCHASING OPTIONS

Interested in learning more? Contact us.

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What do our courses look like?

INTERACTIVE ELEARNING

Video-style and interactive eLearning courses with product demonstrations, simulations, knowledge checks and other learning strategies for self-study.
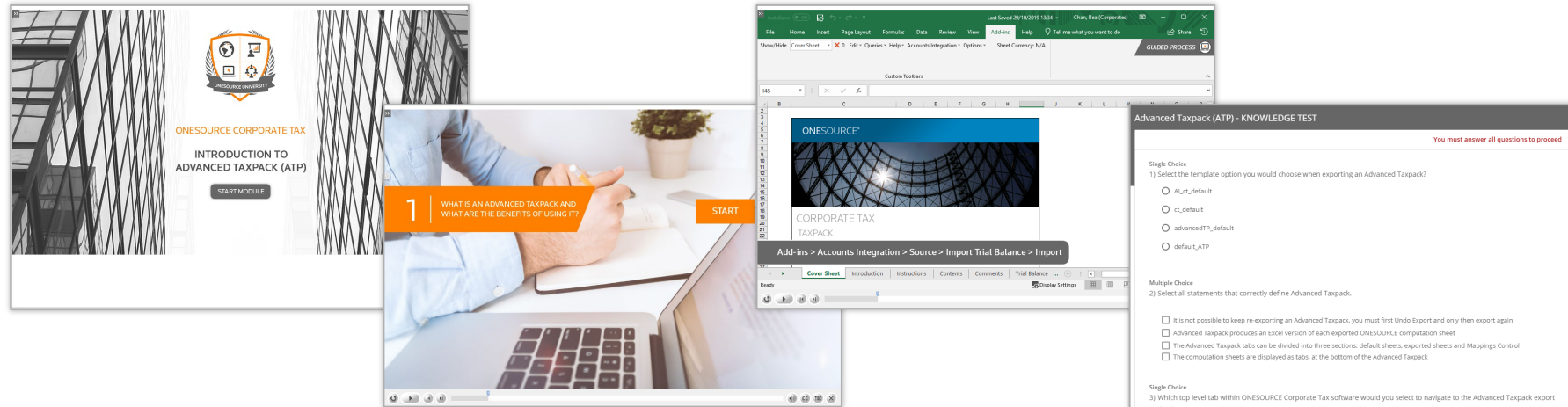
INSTRUCTOR-LED TRAINING

Remote and face-to-face training with ONESOURCE University expert instructors featuring personalized learning and hands-on exercises.

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CERTIFIED USER PROGRAM

LEVELS OF CERTIFICATION

Welcome to the **ONESOURCE Certified User Program!** Are you a tax professional seeking a career-boosting differentiator within your company? Or maybe you just want to **validate your experience and knowledge** within the marketplace? You might be a team lead searching for potential candidates with proven ONESOURCE experience? Or a tax manager looking to **increase proficiencies** within your tax team? If one of those scenarios describes your needs, then you've come to the right place!

TAX PROFESSIONALS
- Product Knowledge Validation
- Market Differentiator
- Digital Badges and Certificate

TAX DEPARTMENTS
- Increase Organizational Proficiency
- Identify Qualified Candidates
- Build Strong Employee Career Paths

PARTNERS
- Increase Services Marketplace Credibility
- Standardize Workforce Skills
- Identify Qualified Team Candidates

1 ONESOURCE PRODUCT — CERTIFIED PROFESSIONAL USER

CERTIFIED PROFESSIONAL USER
User demonstrates a strong knowledge base and high skill level in the required functions/tasks typical of the product.

2 ONESOURCE PRODUCT — CERTIFIED PROFESSIONAL ADMINISTRATOR

CERTIFIED PROFESSIONAL ADMIN
User demonstrates the required level of knowledge necessary to preform typical Administrator tasks.

3 ONESOURCE PRODUCT — CERTIFIED EXPERT

CERTIFIED EXPERT USER
User demonstrates full understanding of advanced features, using the product in complex situations and performing detailed administrative tasks.

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ONESOURCE Tax Provision

WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
ONESOURCE Tax Provision Comprehensive *(three separate courses offered in sequence)*			
└ ONESOURCE Tax Provision Professional User	8.5 hours	8 credits	Link
└ ONESOURCE Tax Provision Expert User	8.5 hours	8 credits	Link
└ ONESOURCE Tax Provision Professional Administrator	8.5 hours	8 credits	Link

Add-ons			
ONESOURCE State Apportionment Comprehensive	8.5 hours	8 credits	Link
ONESOURCE Tax Provision Return and Provision Integration	4 hours	4 credits	Link
ONESOURCE Data Query Comprehensive	4 hours	4 credits	Link
Data Import Add-In Comprehensive	4 hours	4 credits	Link
ONESOURCE Estimated Payments Comprehensive	4 hours	4 credits	Link
ONESOURCE General Ledger Manager Comprehensive	4 hours	4 credits	Link
ONESOURCE Workpapers Professional User for Tax Provision	4 hours	4 credits	Link
ONESOURCE Uncertain Tax Positions Comprehensive	7 hours	6 credits	Link
ONESOURCE Tax Provision Global Access Comprehensive	7 hours	6.5 credits	Link

* Courses marked by an asterisk are not included in the ONESOURCE University Training Passport.

Course Titles		
WebSeminars		
ONESOURCE Tax Provision	• Introduction to Tax Provision v2016 • Federal Provision • State Provision • Payables • Reporting • Deferred Tax Presentations	• Effective Tax Functionality and Reporting • Tax Basis Balance Sheet • Interim Reporting • Trial Balance Upload • Return to Provision
eLearning		

ONESOURCE Tax Provision
 	
(up to 6.5 CPE included)
	• Product Overview (1.5 CPE)
	  • Introduction to ONESOURCE platform ▶ FREE
	  • Introduction to ONESOURCE Tax Provision v2016 ▶ FREE
	  • Introduction to ONESOURCE Administration
	• Federal and State Provision (1 CPE)
	  • Federal Provision Basics
	  • State Provision Basics
	  • State Provision Intermediate
	  • Data Management Basic Concepts ▶ FREE
		• Reporting Overview (1 CPE)
		  • Reporting Basics ▶ FREE
		  • Reporting Intermediate
		  • Reporting Advanced
		• Payables (1 CPE)
		  • Payable Basics
		  • Payables Intermediate
		  • Payables Advanced

Continue →

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ONESOURCE Tax Provision

Course Titles		
eLearning		

ONESOURCE Tax Provision – continued
 	
(up to 6.5 CPE included)
	• Customizing Reports (1 CPE)
	   • Reviewing Data Basics
	   • Deferred Balances Report
	   • Effective Tax Rate Functionality & Reporting Intermediate
	   • Tax Basis Balance Sheet
		• Administration (1 CPE)
		   • Spreadsheet Imports
		   • Administration Basics
		   • Manage System Settings

Integration	• Return and Provision Integration - Starting Returns	• SAP to OTP Integration
ONESOURCE Data Import Add-in	• Data Import Add-in Essentials	
ONESOURCE State Apportionment	• Introduction to ONESOURCE State Apportionment • Structural Setup – Apportionment Accounts • Structural Setup – Entities • Structural Setup – Groups	• Structural Setup – Jurisdictions • Structural Setup – Nexus • Data Entry • Comprehensive On-demand training ◆
Global Access	• Reports – Class Datasets v2016	
ONESOURCE Data Hub	• Getting Started with Data Hub ▶ FREE	• Data Hub Administration ▶ FREE
ONESOURCE Workpapers	• Professional User for Tax Provision On-demand training ◆	
SYNERGY 2020 recorded sessions	• ONESOURCE Tax Provision Version 2016 Basics • Tax Basis Balance Sheet and Income Statement • Return to Provision True Up • ONESOURCE Workpapers Basics • Interim Functionality and Reporting • Deferred Tax Presentations • Global Access Manager	• Tax Provision Integrations • Journal Entry Functionality and Reporting • Flow-Through Functionality • Advanced Topics in Tax Provision • ONESOURCE User Administration Basics • ONESOURCE Entities & Chart of Accounts • Introduction to ONESOURCE Data Hub
SYNERGY 2021 recorded sessions	• Deferred tax presentations • Tax basis balance sheet and income statement • Return to Provision True Up • Leverage enhanced reporting in ONESOURCE Tax Provision utilizing the Journal Entry, Payable and Footnote functionality • ONESOURCE Workpapers basics • ONESOURCE Tax Provision (version 2016) basics • Modern ONESOURCE Tax Provision overview • Uncertain Tax Positions: Basic • General Ledger Manager: Overview • Advanced reporting and administration • Uncertain Tax Positions: Advanced • Interim functionality and reporting • Provision Analytics enabled by ONESOURCE Tax Provision • What's new and coming soon in ONESOURCE data capabilities	• ONESOURCE Global Access manager • Automation: NOLs, valuation allowance and AMT • Payable account tracking • ONESOURCE Tax Provision: Analytics and visualizations • Data lifecycle management with ONESOURCE Data Hub • ONESOURCE Administration Company Info and Reference Data: Centralized key data elements • User Administration basics • State-by-state provision automation: Enable state current provision calculations with OWP • API (Application Programming Interface) 101: What is it and how to take advantage • The future of data integration in the direct tax process • Journal entry functionality and reporting • Flow through

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ONESOURCE Tax Provision

CERTIFICATION EXAMS

Product	Title	Duration
ONESOURCE Tax Provision	Professional Administrator Exam	2 hours
	Professional User Exam	2 hours
	Expert User Exam	2 hours
	Global Access Professional User Exam	2 hours

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ONESOURCE Income Tax – US

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WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
Domestic			
ONESOURCE Income Tax Domestic Comprehensive *(three separate courses offered in sequence)*			
∟ ONESOURCE Income Tax Domestic Federal Professional User	8.5 hours	8 credits	Link
∟ ONESOURCE Income Tax Domestic State Professional User	8.5 hours	8 credits	Link
∟ ONESOURCE Income Tax Domestic Professional Administrator	8.5 hours	8 credits	Link
For 1065 or 1120S, pair the following courses with the Domestic Federal Professional User course for complete Income Tax 1065 or 1120S End-User training:			
ONESOURCE Income Tax Domestic Partnership Professional User	8.5 hours	8 credits	Link
ONESOURCE Income Tax Domestic S-Corporation Professional User	4.0 hours	4 credits	Link
The following courses are stand-alone product courses:			
ONESOURCE Income Tax Domestic Insurance Professional User	8.5 hours	8 credits	Link
ONESOURCE Income Tax Domestic Conversion	8.5 hours	8 credits	Link
The following courses are recommended for a comprehensive Express RS 1120 new user training (schedule in the order and timing that fits your needs):			
ONESOURCE Income Tax Express RS Federal for 1120	8.5	8 credits	Link
ONESOURCE Income Tax Express RS State for 1120	8.5	8 credits	Link
The following courses are recommended for a comprehensive Express RS 1065 new user training (schedule in the order and timing that fits your needs):			
ONESOURCE Income Tax Express RS Federal for 1065	8.5	8 credits	Link
ONESOURCE Income Tax Express RS State for 1065	8.5	8 credits	Link
The following courses are recommended for a comprehensive Express RS 1120S new user training (schedule in the order and timing that fits your needs):			
ONESOURCE Income Tax Express RS Federal for 1120S	8.5	8 credits	Link
ONESOURCE Income Tax Express RS State for 1120S	8.5	8 credits	Link

* Courses marked by an asterisk are not included in the ONESOURCE University Training Passport.

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ONESOURCE Income Tax – US

WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
International			
ONESOURCE Income Tax International Comprehensive *(three separate courses offered in sequence)*			
└ ONESOURCE Income Tax International Professional Administrator	8.5 hours	8 credits	Link
└ ONESOURCE Income Tax International Foreign Entity Professional User	8.5 hours	8 credits	Link
└ ONESOURCE Income Tax International Foreign Tax Credit Professional User	8.5 hours	8 credits	Link
Add-ons			
ONESOURCE State Apportionment Comprehensive	8.5 hours	8 credits	Link
ONESOURCE Tax Provision Return and Provision Integration	4 hours	4 credits	Link
ONESOURCE Data Query Comprehensive	4 hours	4 credits	Link
ONESOURCE Data Import Add-In Comprehensive	4 hours	4 credits	Link
ONESOURCE Estimated Payments Comprehensive	4 hours	4 credits	Link
ONESOURCE General Ledger Manager Comprehensive	4 hours	4 credits	Link
ONESOURCE Workpapers Professional User for Income Tax	4 hours	4 credits	Link

* Courses marked by an asterisk are not included in the ONESOURCE University Training Passport.

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ONESOURCE Income Tax – US

Course Titles

WebSeminars

Domestic	• Product Overview • Maintaining Domestic Charts • Annual Rollover • Using TAS to Complete the Federal Return • Batch Process • Federal Organizer Essentials • Federal Consolidation Essentials	• Maintaining State Charts • State Organizer Essentials • Preparing State Estimates • State Consolidation Essentials • State e-Filing • Express RS Trial Balance
International	• International Charts • International Preparing Form 5471 • International Preparing Form 8858	• International Preparing Form 8865 • International Preparing Form 1118 • International Preparing GILTI Workpapers

eLearning

ONESOURCE Platform	• Introduction to ONESOURCE platform ▶ FREE • Introduction to ONESOURCE Administration • ONESOURCE User Administration Basics	• How to Create a OnePass Profile • How to Create a ONESOURCE Ticket

Domestic	• Domestic Professional Administrator
	   • Product Setup
	   • Maintaining Domestic Charts
	   • Maintaining State Charts
	   • Batch Process Setup
	• Federal Professional User
	   • Product Overview
	   • Tax Accounting System Essentials
	   • Federal Organizer Essentials
	   • Federal Consolidation Essentials
	• State Professional User
	   • State Processing Overview
	   • State A&A Workpapers Essentials
	   • State Organizer Essentials
	   • State Consolidation Essentials
	• Federal Expert User
	   • Batch Process
	   • Federal Organizer Extended
	   • Federal eFiling
		• Domestic Federal Professional User On-demand training ◆
		• Supplemental
		   • Annual Rollover Process ▶ FREE
		   • Federal Consolidation Setup
		   • Automating Adjustments
		   • Preparing Federal Estimates, Penalties and Extensions ▶ FREE
		   • Form 7004 Extensions
		   • Federal Attachments
		   • Preparing Form 1139 Under the CARES Act ▶ FREE
		   • Preparing FinCEN FBAR Form 114
		   • 1120 and 1065 Enhancements ▶ FREE
		   • State Activation
		   • Processing State Modifications
		   • State Consolidation Setup
		   • State Combined Returns with DivCons & Subcons
		   • Enable, Populate, and Print State Estimates
		   • State e-Filing
		   • Jurisdictional Locking

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Course Titles		
eLearning		

S-Corporation	• Domestic S-Corporation Professional User
	   • Shareholder Information
	   • S-Corporation Federal Processing
		• Supplemental
		   • Activity Transfer for 1120S Returns

Partnership	• Domestic Partnership Professional User
	   • Partner Information
	   • Partnership Federal Processing
	   • Partnership State Processing
		• Supplemental
		   • Partner Allocations

International	• Preparing Forms 8991 8992, and 8993 • Preparing Schedule I-1 Under TCJA	• Preparing Form 5471 Under TCA
Insurance	• Preparing Property and Casualty Returns • Preparing Life Insurance Returns • Using TAS to Complete Insurance Returns • NOLs for Insurance Returns	• Insurance Consolidations Best Practices • Troubleshooting Federal Insurance Consolidations • Preparing State Insurance Consolidations
Express RS	• Working with ONESOURCE Income Tax and Express RS ▶ FREE	• 1120S Federal Organizer Express RS
Integration	• Return and Provision Integration - Starting Returns	
ONESOURCE Data Import Add-in	• Data Import Add-in Essentials	
ONESOURCE Data Connection	• Data Connection for Income Tax ▶ FREE	• Data Connection for Express RS ▶ FREE
Data Hub	• Getting Started with Data Hub ▶ FREE	• Data Hub Administration ▶ FREE
ONESOURCE State Apportionment	• Introduction to ONESOURCE State Apportionment • Structural Setup – Apportionment Accounts • Structural Setup – Entities • Structural Setup – Groups	• Structural Setup – Jurisdictions • Structural Setup – Nexus • Data Entry • Comprehensive On-demand training ◆
K-1 Analyzer	• K1- Analyzer Training ▶ FREE	

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ONESOURCE Income Tax – US

Course Titles		
eLearning		
SYNERGY 2020 recorded sessions	• Preparing State Returns in ONESOURCE Income Tax (including State A&A and State TI) • An Overview of the Federal and State E-File Process • New Tax Return Import/Export (Data Connection) Import directly into the Organizer • Introduction to Processing 5471s in ONESOURCE Income Tax International • Processing GILTI through ONESOURCE Income Tax • ONESOURCE Income Tax International Tips and Tricks • Tracking E&P, Tax Pools and other advanced topics for Foreign Entity Processing	• Foreign Tax Credit Entities and Form 1118 Processing • Using ONESOURCE Workpapers • Using Data Query for Reporting • Best Practices for Federal Consolidated Returns • ONESOURCE Income Tax: Did You Know? • State Combined/Consolidated Returns Best Practices • Getting the Most from Common State Best Practices • ONESOURCE Entities & Chart of Accounts • Introduction to ONESOURCE Data Hub • ONESOURCE User Administration Basics
SYNERGY 2021 recorded sessions	• Batch processing in ONESOURCE Income Tax • Getting the most out of user administration • Getting the most from common state • What's new in ONESOURCE Income Tax • Best practices for insurance returns • The new trial balance for ONESOURCE Income Tax Express • Handling K-1s in ONESOURCE Income Tax • How do I prepare the new Schedules K-2 and K-3? • Partnership: Tips and tricks • Best practices for federal consolidated returns • State divisional consolidations • An overview of the federal and state e-file process • Using Data Query with ONESOURCE Income Tax • Federal forms: What data needs to be entered and where • Import into virtually any Organizer field using Data Connection • Starting the new year: Best practices for getting ready • The essentials of mixed-group returns • Clearing diagnostics/validation errors • Preparing state filings for insurance and mixed-group returns • Using ONESOURCE State Apportionment with ONESOURCE Income Tax • ONESOURCE State Apportionment for the experienced user • Getting instant answers to your product questions • Best practices for filing state returns • Using Alteryx with ONESOURCE State Apportionment • ONESOURCE Income Tax: Tips and tricks • Frequently asked questions about state processing	• Tracking earnings and profits, and tax pool information • Processing GILTI through ONEOURCE Income Tax • Customizing reports in ONESOURCE Data Query for international users • Reconciling transfer to forms 5471, 8865, and 8858 • Using ONESOURCE Income Tax International for preparing Form 8975 • Amending returns and managing organizational changes in ONESOURCE Income Tax International • Introduction to processing 5471s in ONESOURCE Income Tax International • Reconciling transfer to Form 1118 • Advanced topics for foreign entity processing • What's new for ONESOURCE Income Tax International • Advanced topics for foreign tax credit entities and Form 1118 processing • Frequently asked questions and best practices for ONESOURCE Income Tax International • Data lifecycle management with ONESOURCE Data Hub • ONESOURCE Administration Company Info and Reference Data: Centralized key data elements • User Administration basics • What's new and coming soon in ONESOURCE data capabilities • How AI and machine learning can help with K-1s • API (Application Programming Interface) 101: What is it and how to take advantage • The future of data integration in the direct tax process

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ONESOURCE Income Tax – US

CERTIFICATION EXAMS

Product	Title	Duration
Income Tax Domestic	Domestic Professional Administrator Exam	2 hours
	Domestic Federal Professional User Exam	2 hours
	Domestic Federal Expert User Exam	2 hours
	Domestic State Professional User Exam	2 hours
	Domestic Partnership Professional User Exam	2 hours
	Domestic S-Corporation Professional User Exam	2 hours
	Domestic Insurance Professional User Exam	2 hours
Express RS	Express RS Federal for 1120 Professional User Exam	2 hours
	Express RS State for 1120 Professional User Exam	2 hours
	Express RS Federal for 1065 Professional User Exam	2 hours
	Express RS Federal for 1120-S Professional User Exam	2 hours
Income Tax International	International Professional Administrator Exam	2 hours
	International Professional User Exam	2 hours
ADD-ONS		
State Apportionment	Professional User Exam	2 hours
Data Query	Professional User Exam	2 hours

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ONESOURCE DataFlow

WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
The following course is based on the new generation product interface:			
ONESOURCE DataFlow Comprehensive	17 hours	16.5 credits	Link

Course Titles		
eLearning		
ONESOURCE DataFlow Classic	• Introduction to ONESOURCE DataFlow ▶ FREE • DataFlow Menu Overview ▶ FREE • Introduction to FormsFlow Designer ▶ FREE • FormsFlow Designer Reports & Template Creation • Introduction to DataFlow Extraction ▶ FREE • DataFlow Extraction – Linking Requests & Rollforward	• Preparing a FormsFlow Workbook • Using FormsFlow Designer Reports • Using ONESOURCE DataFlow • ONESOURCE DataFlow Batch Administration • Data Provider
ONESOURCE DataFlow	• DataFlow and Data Hub Integration ▶ FREE	
Data Hub	• Getting Started with Data Hub ▶ FREE	• Data Hub Administration ▶ FREE
SYNERGY 2020 recorded sessions	• Managing Your Data Collection Process Using ONESOURCE DataFlow	• The Next Generation of Data Collection in ONESOURCE DataFlow
SYNERGY 2021 recorded sessions	• Streamline your tax preparation process with the new ONESOURCE DataFlow	

CERTIFICATION EXAMS

Product	Title	Duration
ONESOURCE DataFlow	Professional User	2 hours
	Professional Administrator	2 hours
	Professional Administrator – DataFlow Classic	2 hours

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ONESOURCE WorkFlow Manager

WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
ONESOURCE WorkFlow Manager Comprehensive	17 hours	16.5 credits	Link
ONESOURCE General Ledger Manager Comprehensive	4 hours	4 credits	Link

Course Titles		
eLearning		
ONESOURCE WorkFlow Manager	• Administration for ONESOURCE WorkFlow • Introduction to ONESOURCE WorkFlow • ONESOURCE WorkFlow Manager Gadgets	• WorkFlows and Tasks • WorkFlows and WorkFlow Browser • Rules-Based WorkFlows • My Work
SYNERGY 2020 recorded sessions	• A Strategic Approach to Content Management Planning for ONESOURCE WorkFlow Manager	

CERTIFICATION EXAMS

Coming soon.

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ONESOURCE Calendar

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WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
The following course is based on the new generation product interface:			
ONESOURCE Calendar Demonstration	4 hours	4 credits	Link

Course Titles	
eLearning	
ONESOURCE Calendar	• Introduction to ONESOURCE Calendar Next Generation ▶ FREE • Administration for ONESOURCE Calendar ▶ FREE • Comprehensive On-demand training ◆
ONESOURCE Calendar Classic	• Introduction to Calendar Classic • Administration for Calendar Classic • Scheduling and Managing Calendar Classic Events • Adding Custom Records to Calendar Classic • Generating Reports in Calendar Classic • Importing for Calendar Classic • Retrieve and View Calendar Classic Data • Tips and Tricks for Calendar Classic • Roll Forward- Calendar Classic
SYNERGY 2021 recorded sessions	• ONESOURCE Calendar: Gain visibility and control over key deadlines

CERTIFICATION EXAMS

Coming soon.

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ONESOURCE Corporate Tax – Europe

WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
ONESOURCE Corporate Tax Legacy UI			
Introduction to Corporate Tax	8 hours	n/a	Link
Advanced Corporate Tax	3.5 hours	n/a	Link
Corporate Tax: Tax Accounting IFRS/FRS101	8 hours	n/a	Link
Corporate Tax: Tax Accounting FRS102	8 hours	n/a	Link
Corporate Tax: Partnership Module	8 hours	n/a	Link

Course Title	Duration	Recommended CPE	Course Agenda
ONESOURCE Corporate Tax New UI			
Introduction to Corporate Tax - Cloud	7 hours	n/a	Link
Advanced Corporate Tax – Cloud	3.5 hours	n/a	Link
Corporate Tax: Tax Accounting IFRS/FRS101 – Cloud	8 hours	n/a	Link

Course Titles	
eLearning	
ONESOURCE Corporate Tax Release 8	• Video Series ► FREE
ONESOURCE Corporate Tax	• Advanced Taxpack (ATP) ► FREE • Introduction to Enterprise Edition ► FREE
ONESOURCE Corporate Tax – Next Generation	• Next Gen Overview ► FREE • Cloud (Next Generation) How To Videos • Account Mapping and Trial Balance Upload ► FREE

CERTIFICATION EXAM

Product	Title	Duration
ONESOURCE Corporate Tax - Legacy	Professional User Exam	2 hours

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ONESOURCE Statutory Reporting

WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
ONESOURCE Statutory Reporting Legacy UI			
Basic User - Legacy	8 hours	n/a	Link
Super User - Legacy	3.5 hours	n/a	Link
ONESOURCE Statutory Reporting New UI			
Basic User - Cloud	7 hours	n/a	Link
Super User - Cloud	3.5 hours	n/a	Link

Course Titles	
eLearning	
ONESOURCE Statutory Reporting 2015	• Refresher Videos (2015 year-end) ▶ FREE
ONESOURCE Statutory Reporting 2020	• Next Generation Migration Users ▶ FREE • Next Generation for Administrators ▶ FREE • Cloud (Next Generation) How To vides • Working with Reports
SYNERGY 2021 recorded sessions	• Global financial reporting: The benefit of technology

CERTIFICATION EXAMS

Coming soon.

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ONESOURCE Indirect Tax

WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
ONESOURCE Determination Original Cloud			
ONESOURCE Determination Original Cloud Hands-on Introduction	12 hours	13.5 credits	Link
ONESOURCE Determination Original Cloud Hands-on Advanced	8 hours	9 credits	Link
ONESOURCE Determination Enterprise Cloud			
ONESOURCE Determination Enterprise Cloud Hands-on Introduction	12 hours	12.5 credits	Link
ONESOURCE Indirect Compliance – Sales & Use (US and Canada)			
ONESOURCE Indirect Compliance (Sales & Use) Hands-on Introduction	11 hours 15 min	13.5 credits	Link
ONESOURCE Indirect Compliance (Sales & Use) Hands-on Advanced	8 hours	9 credits	Link
ONESOURCE Indirect Compliance – VAT			
ONESOURCE Indirect Compliance - VAT Hands-on Introduction	4 hours	4 credits	Link
ERP Integration			
ONESOURCE Indirect Tax Integration - Determination - SAP Global Next - New Users	4 hours	4 credits	Link
ONESOURCE Indirect Tax Integration - Determination - SAP Global Next - Experienced Users	4 hours	4 credits	Link
ONESOURCE Indirect Tax Integration - Determination - Oracle Fusion	4 hours	4 credits	Link

Course Titles		
WebSeminars		
ONESOURCE Determination (Enterprise Cloud)	• Introduction to ONESOURCE Certificate Manager • Office Hours	• Introduction to ONESOURCE Data File Integrator
ERP Integration	• SAP Ariba Implementation Process	

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ONESOURCE Indirect Tax

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Welcome

Who we are

Learning Options

What do our courses look like?

Certified User Program

ONESOURCE Tax Provision

ONESOURCE Income Tax – US

ONESOURCE DataFlow

ONESOURCE WorkFlow Manager

ONESOURCE Calendar

ONESOURCE Corporate Tax – Europe

ONESOURCE Statutory Reporting

ONESOURCE Indirect Tax

ONESOURCE Global Trade

Contact Us

Course Titles	
eLearning	
ONESOURCE Determination (Original Cloud)	• Solution Overview ► FREE • Managing Exempt Customers • Introduction to Certificate Manager	• Transaction Extract Reporting • Reporting ► FREE • Integration Principles ► FREE

ONESOURCE Determination (Enterprise Cloud)
 	
(up to 4.0 CPE included)
	• Product Overview (4.0 CPE)
	  • Indirect Tax Overview
	  • Model Scenario
	  • Managing Exempt Customers
	  • Tax Jurisdictions
	  • Product Mapping
	  • ONESOURCE Determination Conditional Mapping
	• Solution Overview ► FREE
	• Integration Principles ► FREE
	• Certificate Manager ► FREE
	• Standard Rate Lookup
	• TransEditors
	• SAP Global Next Implementation Process
		• Introduction to Reports and Analytics ► FREE
		• Tire Fees ► FREE
		• Certificate Manager: Reviewing the Import Templates and User Interface
		• Data File Integrator (DFI)
		• Reports & Analytics: Advanced Reporting
		• Custom Rates and Fees
		• ERP Code Mapping
		• Vendor Charged Tax Verification
		• Content Extract
		• Determination for VAT: Intra-community Dispatch Sales
		• Model Scenario for Common VAT Transactions

ONESOURCE Indirect Compliance – Sales & Use (US & Canada)	• Determination to Compliance (D2C) Merge	• Electronic Filing Overview
ONESOURCE Indirect Compliance – VAT	• Exploring Navigation Features of the Platform ► FREE • Importing and Viewing Transaction Details • Generating and Submitting Returns	• Running and Managing Reports ► FREE • Using Workpapers • Performing Administration Functions
ONESOURCE Indirect Tax - Integration	• SAP Global Next On-demand Training • SAP Commerce Cloud • SAP Business One	• Oracle Fusion • SAP Ariba
SYNERGY 2020 recorded sessions	• Around the World with Global Indirect Tax Research and Content • Tips and Tricks Fees, Other Charges, Tax Credits and Prepayments • Tips and Tricks Credits and Suspensions CA e-File, and Remote Sellers Support • Indirect Tax and Global Compliance • Introduction and Best Ways to Use ONESOURCE Indirect Compliance for VAT & GST • ONESOURCE Indirect Compliance for VAT & GST: New Digital Tax Reporting and Market Trends • New SAP US Global Tax Service Integrations for SAP S/4HANA Any Premise and SAP S/4HANA Cloud	• Enhancements on Oracle ERP Cloud (Fusion) Integration • Introduction to Indirect Tax Next Generation Reporting and Analytics • What's New with ONESOURCE Indirect Compliance for VAT & GST • What's New with ONESOURCE Sales & Use Tax Compliance • What's New with ONESOURCE Determination – Original Shared and Original Dedicated Cloud
SYNERGY 2021 recorded sessions	• Metrics for tax success: Basic reporting, it's all about the data • Accelerating digital: Managing the global indirect tax lifecycle • The big shift: Impacts of real-time filing and e-invoicing • SAP and ONESOURCE: Better together! • Leveraging RPA, intelligent automation and analytics as part of your tax engine implementation • Leveraging Alteryx and data analytics tools to optimize your implementation and post go-live ONESOURCE maintenance	• What's new with the ONESOURCE Determination enterprise cloud • Current and future states of integrations • Global indirect tax determination: Regulatory changes that impact your business • Oracle and ONESOURCE: Elevate tax performance! • Integration of PeopleSoft 9.2 with ONESOURCE for indirect tax for payables

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ONESOURCE Indirect Tax

Course Titles
eLearning

SYNERGY 2021 recorded sessions	• What's new with ONESOURCE Indirect Compliance • What's new with ONESOURCE Determination, Tax Information Reporting, and Certificate Manager • Metrics for tax success: From basic reporting to actionable analytics • What's new with ONESOURCE Indirect Compliance for VAT and GST • Best practices for integrating ONESOURCE Determination with a procurement system	• ONESOURCE Sales and Use Tax Compliance tips and tricks on reporting and reconciliation • EU One-Stop Shop (OSS) and e-commerce regulations • ONESOURCE Sales and Use Tax Compliance work area actions and batch processing • Preparing for a cloud ERP migration • ONESOURCE Sales and Use Tax Compliance prepayments module tips and tricks • Tax Traps for the Unwary: Staying ahead of Changes in State and Local Tax

CERTIFICATION EXAMS

Product	Title	Duration
ONESOURCE Determination (Original Cloud)	Professional User Exam	2 hours
	Expert User Exam	2 hours
ONESOURCE Determination (Enterprise Cloud)	Professional User Exam	2 hours
ONESOURCE Indirect Compliance – VAT	Professional User Exam	2 hours
ERP Integration	Integration for SAP Global Next – Professional User Exam	2 hours
ONESOURCE Indirect Compliance - S&U Tax	Professional User Exam	2 hours

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ONESOURCE Global Trade

WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
Denied Party Screening (DPS) Fundamentals	3 hours	n/a	Link
Global Classification (GC) Fundamentals	4 hours	n/a	Link
Global Classification (GC) Advanced	3 hours	n/a	Link
Foreign Trade Zones (FTZ) Basic Distribution Processing	4 hours	n/a	Link
Foreign Trade Zones (FTZ) Reports	4 hours	n/a	Link
Foreign Trade Zones (FTZ) Validations and Data Correction Tools	3 hours	n/a	Link
Content Harmonized Schedule (HS) Fundamentals	3 hours	n/a	Link

Course Titles	
Web Seminars	
Denied Party Screening (DPS)	• Office Hours
Global Classification (GC)	• Office Hours
Global Trade Content	• Office Hours
Foreign Trade Zones (FTZ)	• Office Hours
eLearning	
Foreign Trade Zones	• Introduction and Overview of Foreign Trade Zones • Maintenance Data • PGA Management • Download Transactions • Validate Transactions • 214 Assignment • 3461 Estimate • 7501 and 7512 Assignments • FIFO and LOT Processing • Daily Reporting – CBP Requirements • FTZ Balance Reports Overview • FTZ Reports • FTZ Tools
Denied Party Screening	• Introduction to Denied Party Screening
Global Classification	• Introduction to Global Classification • Smart ECN
Export Management	• Introduction to Export Management
Import Management	• Introduction to Import Management
Entry Verification	• Introduction to Entry Verification
Free Trade Agreements	• Introduction to Free Trade Agreements • FTA Supplier Response • FTA Supplier Solicitation
Government Connectivity	• Introduction to Government Connectivity, US AES • Introduction to Government Connectivity, US ABI

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ONESOURCE Global Trade

Course Titles	
eLearning	
Global Trade Visibility	• Introduction to Global Trade Visibility
Supply Chain Compliance	• Introduction to Supply Chain Compliance
Trade Lane Analyzer	• Introduction to Trade Lane Analyzer
ERP Integration	• Introduction to SAP Connectors
Global Trade Content	• Introduction to Global Trade Content
IMMEX	• Goods Transfer Constancy
General	• Report Builder
SYNERGY 2020 recorded sessions	• Best Practices Using Import and Export Management and Verification • Global Classification and Smart HS Update • New Connectors in GTM • What is New in Screening and Clear • Keeping up with Regulatory Changes Using Global Trade Content • Exploring GTM Platform Tools and Zone Health Checks
SYNERGY 2021 recorded sessions	• Using ONESOURCE Global Trade Content to keep up with regulatory changes • Mastering your zone: Tips and tricks for ONESOURCE FTZ software • Classification corner: New tools, new technologies with ONESOURCE Global Classification • GTM Health Checks and Platform Tools • Tips to ensure a smooth ONESOURCE Global Trade implementation • Best practices to stay compliant using ONESOURCE Export Management and AES for GTM • Auto solicitation and savings through ONESOURCE FTA Management software • Best practices: Training makes for better compliance • Trade modernization: Does CBP's 21st Century Customs Framework meet the challenges? • How to determine if an FTA is right for you • Mitigating risk in your supply chain: Forced labor and China trade policies

CERTIFICATION EXAMS

Product	Title	Duration
Foreign Trade Zone	Professional User Certification Exam	2 hours
Denied Party Screening	Professional User Certification Exam	2 hours
Global Classification	Professional User Certification Exam	2 hours
Content Harmonized Solution	Professional User Certification Exam	2 hours

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For more information, contact your Account Manager or Customer Success Executive to discuss purchasing options.

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