Welcome to Thomson Reuters ONESOURCE University. This training catalog offers a range of learning options, including:

- **Certified User Program**
- **ONESOURCE Tax Provision**
- **ONESOURCE Income Tax – US**
- **ONESOURCE DataFlow**
- **ONESOURCE WorkFlow Manager**
- **ONESOURCE Corporate Tax – Europe**
- **ONESOURCE Statutory Reporting**
- **ONESOURCE Indirect Tax**
- **ONESOURCE Global Trade**

Contact us for more information or to register for courses.
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
**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.
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

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

PURCHASING OPTIONS

Interested in learning more? Contact us.

<table>
<thead>
<tr>
<th>Training Passport</th>
<th>Dedicated</th>
<th>Workshop seats</th>
<th>Subscription</th>
<th>Certification</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Training Passport is an all-access, recurring training subscription to all virtual Workshops, WebSeminars, eLearning, and User Certifications.</td>
<td>Delivered either remote or onsite, dedicated courses are conducted by ONESOURCE University expert trainers and are ideal for groups of users looking for personalized training.</td>
<td>Our schedule of remote workshops gives you the opportunity to learn in a hands-on training environment while you interact with other clients and share best practices and tips.</td>
<td>ONESOURCE University Subscriptions give you 1-year of access to all eLearning modules and WebSeminars available in the training subscription of your specific product.</td>
<td>ONESOURCE University User Certification helps users validate their knowledge, gain confidence, socialize achievements in social medias – and take their tax department to the next level.</td>
</tr>
</tbody>
</table>

Courses identified with this tag are free – enroll now!
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.
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 proficiency 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

**LEVELS OF CERTIFICATION**

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

2. **CERTIFIED PROFESSIONAL ADMIN**
   - User demonstrates the required level of knowledge necessary to perform typical Administrator tasks.

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

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Duration</th>
<th>Recommended CPE</th>
<th>Course Agenda</th>
</tr>
</thead>
<tbody>
<tr>
<td>ONESOURCE Tax Provision Comprehensive</td>
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<tr>
<td>ONESOURCE Tax Provision Professional User</td>
<td>8.5 hours</td>
<td>8</td>
<td>Link</td>
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<tr>
<td>ONESOURCE Tax Provision Expert User</td>
<td>8.5 hours</td>
<td>8</td>
<td>Link</td>
</tr>
<tr>
<td>ONESOURCE Tax Provision Professional Administrator</td>
<td>8.5 hours</td>
<td>8</td>
<td>Link</td>
</tr>
<tr>
<td>ONESOURCE Tax Provision Tailored (Build Your Own Agenda)*</td>
<td>Min. of 4 hours</td>
<td>4 credits</td>
<td>Link</td>
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#### Add-ons

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Duration</th>
<th>Recommended CPE</th>
<th>Course Agenda</th>
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<tbody>
<tr>
<td>ONESOURCE State Apportionment Comprehensive</td>
<td>8.5 hours</td>
<td>8</td>
<td>Link</td>
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<tr>
<td>ONESOURCE Tax Provision Return and Provision Integration</td>
<td>4 hours</td>
<td>4</td>
<td>Link</td>
</tr>
<tr>
<td>ONESOURCE Data Query Comprehensive</td>
<td>4.5 hours</td>
<td>4.5</td>
<td>Link</td>
</tr>
<tr>
<td>Data Import Add-In Comprehensive</td>
<td>4 hours</td>
<td>4</td>
<td>Link</td>
</tr>
<tr>
<td>ONESOURCE Estimated Payments Comprehensive</td>
<td>4 hours</td>
<td>4</td>
<td>Link</td>
</tr>
<tr>
<td>ONESOURCE General Ledger Manager Comprehensive</td>
<td>4 hours</td>
<td>4</td>
<td>Link</td>
</tr>
<tr>
<td>ONESOURCE Workpapers Professional User for Tax Provision</td>
<td>4 hours</td>
<td>4</td>
<td>Link</td>
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<tr>
<td>ONESOURCE Uncertain Tax Positions Comprehensive</td>
<td>6.5 hours</td>
<td>6</td>
<td>Link</td>
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<tr>
<td>ONESOURCE Tax Provision Global Access Comprehensive</td>
<td>7 hours</td>
<td>6.5</td>
<td>Link</td>
</tr>
</tbody>
</table>

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

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### WebSeminars

- Introduction to ONESOURCE 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
  - Payables (1 CPE)
    - Payables Basics
    - Payables Intermediate
    - Payables Advanced
  - Reporting Overview (1 CPE)
    - Reporting Basics ▶️ FREE
    - Reporting Intermediate
    - Reporting Advanced

---
<table>
<thead>
<tr>
<th>Course Titles</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>eLearning</strong></td>
</tr>
<tr>
<td>ONESOURCE Tax Provision – continued (up to 6.5 CPE included)</td>
</tr>
<tr>
<td>Customizing Reports (1 CPE)</td>
</tr>
<tr>
<td>Reviewing Data Basics</td>
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<tr>
<td>Deferred Balances Report</td>
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<tr>
<td>Effective Tax Rate Functionality &amp; Reporting Intermediate</td>
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<tr>
<td>Tax Basis Balance Sheet</td>
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<tr>
<td><strong>ONEXSOURCE State Apportionment</strong></td>
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<tr>
<td>Structural Setup - Apportionment Accounts</td>
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<tr>
<td>Structural Setup – Entities</td>
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<tr>
<td>Structural Setup – Groups</td>
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<tr>
<td>Structural Setup – Jurisdictions</td>
</tr>
<tr>
<td><strong>ONESOURCE General Ledger Manager</strong></td>
</tr>
<tr>
<td>End User Processes and Best Practices</td>
</tr>
<tr>
<td><strong>SYNERGY 2020 recorded sessions</strong></td>
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<tr>
<td>ONESOURCE Tax Provision Version 2016 Basics</td>
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<tr>
<td>Tax Basis Balance Sheet and Income Statement</td>
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<tr>
<td>Return to Provision True Up</td>
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<td>ONESOURCE Workpapers Basics</td>
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<td>Interim Functionality and Reporting</td>
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<td>Deferred Tax Presentations</td>
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<td>Global Access Manager</td>
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<td><strong>ONEXSOURCE Calendar</strong></td>
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<td><strong>ONESOURCE Corporate Tax – Europe</strong></td>
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<tr>
<td><strong>ONESOURCE Statutory Reporting</strong></td>
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<tr>
<td><strong>ONESOURCE Indirect Tax</strong></td>
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<tr>
<td><strong>ONESOURCE Global Trade</strong></td>
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<td><strong>Contact Us</strong></td>
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### CERTIFICATION EXAMS

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<tr>
<th>Product</th>
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<tr>
<td>ONESOURCE Tax Provision</td>
<td>Professional User Exam</td>
<td>2 hours</td>
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<tr>
<td></td>
<td>Professional Administrator Exam</td>
<td>2 hours</td>
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<tr>
<td></td>
<td>Expert User Exam</td>
<td>2 hours</td>
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# WORKSHOPS

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Duration</th>
<th>Recommended CPE</th>
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<tbody>
<tr>
<td><strong>Domestic</strong></td>
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<tr>
<td>ONESOURCE Income Tax Comprehensive</td>
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<td>ONESOURCE Income Tax Domestic Federal Professional User</td>
<td>8.5 hours</td>
<td>8 credits</td>
<td>Link</td>
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<td>ONESOURCE Income Tax Domestic State Professional User</td>
<td>8.5 hours</td>
<td>8 credits</td>
<td>Link</td>
</tr>
<tr>
<td>ONESOURCE Income Tax Domestic Professional Administrator</td>
<td>8.5 hours</td>
<td>8 credits</td>
<td>Link</td>
</tr>
<tr>
<td>ONESOURCE Income Tax Domestic Partnership Professional User</td>
<td>8.5 hours</td>
<td>8 credits</td>
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<td>ONESOURCE Income Tax Domestic S-Corporation Professional User</td>
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<td>ONESOURCE Income Tax Domestic Insurance</td>
<td>4.5 hours</td>
<td>4.5 credits</td>
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<td>ONESOURCE Income Tax Domestic Conversion</td>
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<td>varied</td>
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<td>ONESOURCE Income Tax Express RS Domestic for 1120</td>
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<td>Min. of 4 hours</td>
<td>varied</td>
<td>Link</td>
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<tr>
<td><strong>International</strong></td>
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<td>ONESOURCE Income Tax International Comprehensive</td>
<td>25.5 hours</td>
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<td>17 hours</td>
<td>16.5 credits</td>
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<tr>
<td>ONESOURCE Income Tax International Administrator</td>
<td>8.5 hours</td>
<td>8 credits</td>
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<tr>
<td>ONESOURCE Income Tax International Build Your Own Agenda*</td>
<td>Min. of 4 hours</td>
<td>varied</td>
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<tr>
<td><strong>Add-ons</strong></td>
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<tr>
<td>ONESOURCE State Apportionment Comprehensive</td>
<td>8.5 hours</td>
<td>8 credits</td>
<td>Link</td>
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<tr>
<td>ONESOURCE Tax Provision Return and Provision Integration</td>
<td>4 hours</td>
<td>4 credits</td>
<td>Link</td>
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<tr>
<td>ONESOURCE Data Query Comprehensive</td>
<td>4.5 hours</td>
<td>4.5 credits</td>
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<tr>
<td>ONESOURCE Data Import Add-In Comprehensive</td>
<td>4 hours</td>
<td>4 credits</td>
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<tr>
<td>ONESOURCE Estimated Payments Comprehensive</td>
<td>4 hours</td>
<td>4 credits</td>
<td>Link</td>
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<tr>
<td>ONESOURCE General Ledger Manager Comprehensive</td>
<td>4 hours</td>
<td>4 credits</td>
<td>Link</td>
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<tr>
<td>ONESOURCE Workpapers Professional User for Income Tax</td>
<td>4 hours</td>
<td>4 credits</td>
<td>Link</td>
</tr>
</tbody>
</table>

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

#### WebSeminars

**ONESOURCE Income Tax**
- 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
- International Charts
- Preparing Form 5471
- Preparing Form 8858
- Preparing Form 8865
- Preparing Form 1118
- Preparing GILTI Workpapers
- Express RS Trial Balance

#### eLearning

**ONESOURCE Platform**
- Introduction to ONESOURCE platform ► FREE

**Domestic**
- 1120 and 1065 Enhancements ► FREE
- Annual Rollover Process ► FREE
- Federal Processing
- Using TAS to Complete the Federal Return
- Federal Organizer
- Federal e-Filing
- Federal Consolidations Setup
- Federal Consolidations Express RS
- Preparing Federal Estimates, Penalties and Extensions ► FREE
- Preparing FinCEN FBAR Form 114
- Data Connection for Express RS ► FREE
- Data Connection for Income Tax ► FREE
- 1120S Federal Organizer Express RS
- Processing State Modifications
- State e-Filing
- State Consolidation Setup
- State Consolidation Processing
- State Combined Returns with DivCons & Subcons
- Preparing Form 1139 Under the CARES Act ► FREE
- State Activation
- Enable, Populate, and Print State Estimates
- Federal Attachments
- Form 7004 Extensions
- Jurisdictional Locking
- Working with ONESOURCE Income Tax and Express RS ► FREE

**S-Corporation**
- Activity Transfer for 1120S Returns

**Partnership**
- Preparing Partnership Returns

**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

**ONESOURCE Integration**
- Return and Provision Integration - Starting Returns
- Return and Provision Integration – Return to Provision

**ONESOURCE Data Import Add-in**
- Templates
- Data Import Tab
- Import Log
- Mapping Data
- Transferring Data
### Course Titles

#### eLearning

<table>
<thead>
<tr>
<th>Data Hub</th>
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<tr>
<td>• Getting Started with Data Hub ➤ FREE</td>
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<tr>
<th>ONESOURCE State Apportionment</th>
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<tbody>
<tr>
<td>• Structural Setup - Apportionment Accounts</td>
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<tr>
<td>• Structural Setup – Entities</td>
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<tr>
<td>• Structural Setup – Groups</td>
</tr>
<tr>
<td>• Structural Setup – Jurisdictions</td>
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<tr>
<td>• Structural Setup – Nexus</td>
</tr>
<tr>
<td>• Introduction to ONESOURCE State Apportionment</td>
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<tr>
<td>• ONESOURCE State Apportionment - Data Entry</td>
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<table>
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<tbody>
<tr>
<td>• K1- Analyzer Training ➤ FREE</td>
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<table>
<thead>
<tr>
<th>ONESOURCE General Ledger Manager</th>
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<tbody>
<tr>
<td>• End User Processes and Best Practices</td>
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### SYNERGY 2020 recorded sessions

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

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>ONESOURCE Income Tax</td>
<td>Domestic State Professional User</td>
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<td></td>
<td>Domestic Federal Professional User</td>
<td>2 hours</td>
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<tr>
<td></td>
<td>Domestic Partnership Professional User</td>
<td>2 hours</td>
</tr>
<tr>
<td></td>
<td>Domestic Professional Administrator</td>
<td>2 hours</td>
</tr>
<tr>
<td></td>
<td>International Professional User</td>
<td>2 hours</td>
</tr>
<tr>
<td></td>
<td>International Professional Administrator</td>
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**ONESOURCE Income Tax – US**
## WORKSHOPS

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Duration</th>
<th>Recommended CPE</th>
<th>Course Agenda</th>
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<tbody>
<tr>
<td>ONESOURCE DataFlow Classic Comprehensive</td>
<td>17 hours</td>
<td>16.5 credits</td>
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<tr>
<td>ONESOURCE DataFlow End User</td>
<td>17 hours</td>
<td>16.5 credits</td>
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<tr>
<td>ONESOURCE DataFlow Upgrade</td>
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<td>ONESOURCE DataFlow Tailored Workshop (Build Your Own Agenda)</td>
<td>Min. of 4 hours</td>
<td>varied</td>
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### Course Titles

#### eLearning

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<tr>
<th>Product</th>
<th>Title</th>
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<tbody>
<tr>
<td>ONESOURCE DataFlow Classic</td>
<td>Introduction to ONESOURCE DataFlow</td>
<td>[FREE]</td>
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<tr>
<td></td>
<td>DataFlow Menu Overview</td>
<td>[FREE]</td>
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<tr>
<td></td>
<td>Introduction to FormsFlow Designer</td>
<td>[FREE]</td>
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<td>FormsFlow Designer Reports &amp; Template Creation</td>
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<tr>
<td></td>
<td>Introduction to DataFlow Extraction</td>
<td>[FREE]</td>
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<td>DataFlow Extraction – Linking Requests &amp; Rollforward</td>
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<tr>
<td>ONESOURCE DataFlow</td>
<td>DataFlow and Data Hub Integration</td>
<td>[FREE]</td>
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<tr>
<td>Data Hub</td>
<td>Getting Started with Data Hub</td>
<td>[FREE]</td>
</tr>
<tr>
<td></td>
<td>Data Hub Administration</td>
<td>[FREE]</td>
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<tr>
<td>SYNERGY 2020 recorded sessions</td>
<td>Managing Your Data Collection Process Using ONESOURCE DataFlow</td>
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<td>SYNERGY 2021 recorded sessions</td>
<td>Streamline your tax preparation process with the new ONESOURCE DataFlow</td>
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<tr>
<td></td>
<td>The Next Generation of Data Collection in ONESOURCE DataFlow</td>
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<tr>
<td></td>
<td>Introduction to ONESOURCE Data Hub</td>
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<tr>
<td></td>
<td>Data lifecycle management with ONESOURCE Data Hub</td>
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### CERTIFICATION EXAMS

<table>
<thead>
<tr>
<th>Product</th>
<th>Title</th>
<th>Duration</th>
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<tbody>
<tr>
<td>ONESOURCE DataFlow</td>
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<td>Professional Administrator</td>
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<tr>
<td></td>
<td>Professional Administrator – DataFlow Classic</td>
<td>2 hours</td>
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### Thomson Reuters ONESOURCE University

**Welcome**

**Who we are**

**Learning Options**

**What do our courses look like?**

**Certified User Program**

**ONESOURCE Tax Provision**

**ONESOURCE Income Tax – US**

**ONESOURCE WorkFlow Manager**

**ONESOURCE Corporate Tax – Europe**

**ONESOURCE Statutory Reporting**

**ONESOURCE Indirect Tax**

**ONESOURCE Global Trade**

**Contact Us**
WORKSHOPS

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Duration</th>
<th>Recommended CPE</th>
<th>Course Agenda</th>
</tr>
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<tbody>
<tr>
<td>ONESOURCE WorkFlow Manager Comprehensive</td>
<td>17 hours</td>
<td>16.5 credits</td>
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<tr>
<td>ONESOURCE General Ledger Manager Comprehensive</td>
<td>4 hours</td>
<td>4 credits</td>
<td>Link</td>
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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.
## WORKSHOPS

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Duration</th>
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<tr>
<td>ONESOURCE Calendar Demonstration</td>
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### eLearning

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<thead>
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<th>Course Title</th>
<th>Duration</th>
<th>Recommended CPE</th>
<th>Course Agenda</th>
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<tbody>
<tr>
<td>ONESOURCE Calendar</td>
<td></td>
<td></td>
<td>• Introduction to ONESOURCE Calendar Next Generation ★ FREE</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Administration for ONESOURCE Calendar ★ FREE</td>
</tr>
<tr>
<td>ONESOURCE Calendar Classic</td>
<td></td>
<td></td>
<td>• Introduction to Calendar</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Administration for Calendar</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Scheduling and Managing Calendar</td>
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<td>• Adding Custom Records to Calendar</td>
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<td>• Generating Reports in Calendar</td>
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<td></td>
<td>• ONESOURCE Calendar: Gain visibility and control over key deadlines</td>
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<td></td>
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<td>• Importing for Calendar</td>
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<td></td>
<td>• Retrieve and View Calendar Data</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Tips and Tricks for Calendar</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• Roll Forward</td>
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### Course Titles

**ONESOURCE Calendar**
- Introduction to ONESOURCE Calendar Next Generation ★ FREE
- Administration for ONESOURCE Calendar ★ FREE
- Introduction to Calendar
- Administration for Calendar
- Scheduling and Managing Calendar
- Adding Custom Records to Calendar
- Generating Reports in Calendar
- Importing for Calendar
- Retrieve and View Calendar Data
- Tips and Tricks for Calendar
- Roll Forward

**SYNERGY 2021 recorded sessions**
- ONESOURCE Calendar: Gain visibility and control over key deadlines

## CERTIFICATION EXAMS

Coming soon.
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<table>
<thead>
<tr>
<th>Course Title</th>
<th>Duration</th>
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<th>Course Agenda</th>
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<tr>
<td><strong>ONESOURCE Corporate Tax Legacy UI</strong></td>
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<tr>
<td>Introduction to Corporate Tax</td>
<td>8 hours</td>
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<tr>
<td>Advanced Corporate Tax</td>
<td>3.5 hours</td>
<td>n/a</td>
<td>Link</td>
</tr>
<tr>
<td>Corporate Tax: Tax Accounting IFRS/FRS101</td>
<td>8 hours</td>
<td>n/a</td>
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<tr>
<td>Corporate Tax: Tax Accounting FRS102</td>
<td>8 hours</td>
<td>n/a</td>
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<tr>
<td>Corporate Tax: Partnership Module</td>
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<td>n/a</td>
<td>Link</td>
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<tr>
<td><strong>ONESOURCE Corporate Tax New UI</strong></td>
<td></td>
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<td></td>
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<tr>
<td>Introduction to Corporate Tax – Cloud</td>
<td>7 hours</td>
<td>n/a</td>
<td>Link</td>
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<tr>
<td>Advanced Corporate Tax – Cloud</td>
<td>3.5 hours</td>
<td>n/a</td>
<td>Link</td>
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<tr>
<td>Corporate Tax: Tax Accounting IFRS/FRS101 – Cloud</td>
<td>8 hours</td>
<td>n/a</td>
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## eLearning

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<thead>
<tr>
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<tbody>
<tr>
<td>ONESOURCE Corporate Tax Release 8</td>
<td>• Video Series ► FREE</td>
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<tr>
<td>ONESOURCE Corporate Tax</td>
<td>• Advanced Taxpack (ATP) ► FREE</td>
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<tr>
<td>ONESOURCE Corporate Tax – Next Generation</td>
<td>• Next Gen Overview ► FREE</td>
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<tr>
<td></td>
<td>• Account Mapping and Trial Balance Upload ► FREE</td>
<td></td>
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<tr>
<td></td>
<td>• Introduction to Enterprise Edition ► FREE</td>
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<tr>
<td></td>
<td>• Cloud (Next Generation) How To Videos</td>
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## CERTIFICATION EXAM

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<th>Product</th>
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<tr>
<td>ONESOURCE Corporate Tax - Legacy</td>
<td>Professional User Exam</td>
<td>2 hours</td>
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WORKSHOPS

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<th>Duration</th>
<th>Recommended CPE</th>
<th>Course Agenda</th>
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<tbody>
<tr>
<td>ONESOURCE Statutory Reporting Legacy UI</td>
<td></td>
<td></td>
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<tr>
<td>Basic User - Legacy</td>
<td>8 hours</td>
<td>n/a</td>
<td>Link</td>
</tr>
<tr>
<td>Super User - Legacy</td>
<td>3.5 hours</td>
<td>n/a</td>
<td>Link</td>
</tr>
<tr>
<td>ONESOURCE Statutory Reporting New UI</td>
<td></td>
<td></td>
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<tr>
<td>Basic User - Cloud</td>
<td>7 hours</td>
<td>n/a</td>
<td>Link</td>
</tr>
<tr>
<td>Super User - Cloud</td>
<td>3.5 hours</td>
<td>n/a</td>
<td>Link</td>
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</tbody>
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CERTIFICATION EXAMS

Coming soon.

Course Titles

eLearning

- ONESOURCE Statutory Reporting 2015
  - Refresher Videos (2015 year-end) ► FREE
- ONESOURCE Statutory Reporting 2020
  - Next Generation Migration Users ► FREE
  - Cloud (Next Generation) How To videos
- SYNERGY 2021 recorded sessions
  - Global financial reporting: The benefit of technology

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ONESOURCE Income Tax – US

ONESOURCE DataFlow

ONESOURCE WorkFlow Manager

ONESOURCE Calendar

ONESOURCE Corporate Tax – Europe

ONESOURCE Statutory Reporting

ONESOURCE Indirect Tax

ONESOURCE Global Trade

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

<table>
<thead>
<tr>
<th>WebSeminars</th>
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</table>
| ONESOURCE Determination (Enterprise Cloud)             | • Introduction to ONESOURCE Certificate Manager  
• Office Hours |
| ERP Integration                                       | • Introduction to ONESOURCE Data File Integrator  
• SAP Ariba Implementation Process |
## ONESOURCE Indirect Tax

### 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
- 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
- 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
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

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**CERTIFICATION EXAMS**

<table>
<thead>
<tr>
<th>Product</th>
<th>Title</th>
<th>Duration</th>
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<tbody>
<tr>
<td>ONESOURCE Determination (Original Cloud)</td>
<td>Professional User Exam</td>
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<td>Expert User Exam</td>
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<tr>
<td>ONESOURCE Determination (Enterprise Cloud)</td>
<td>Professional User Exam</td>
<td>2 hours</td>
</tr>
<tr>
<td>ONESOURCE Indirect Compliance – VAT</td>
<td>Professional User Exam</td>
<td>2 hours</td>
</tr>
<tr>
<td>ERP Integration</td>
<td>Integration for SAP Global Next – Professional User Exam</td>
<td>2 hours</td>
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<tr>
<td>ONESOURCE Indirect Compliance - S&amp;U Tax</td>
<td>Professional User Exam</td>
<td>2 hours</td>
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## WORKSHOPS

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Duration</th>
<th>Recommended CPE</th>
<th>Course Agenda</th>
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<tbody>
<tr>
<td>Denied Party Screening (DPS) Fundamentals</td>
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## 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
### Course Titles

#### eLearning

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<td>Trade Lane Analyzer</td>
<td>• Introduction to Trade Lane Analyzer</td>
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<td>ERP Integration</td>
<td>• Introduction to SAP Connectors</td>
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<td>IMMEX</td>
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#### SYNERGY 2020 recorded sessions

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<td>• Best Practices Using Import and Export Management and Verification</td>
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<td>• Global Classification and Smart HS Update</td>
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<td>• New Connectors in GTM</td>
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<td>• What is New in Screening and Clear</td>
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<td>• Keeping up with Regulatory Changes Using Global Trade Content</td>
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<tr>
<td>• Exploring GTM Platform Tools and Zone Health Checks</td>
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#### SYNERGY 2021 recorded sessions

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<td>• Using ONESOURCE Global Trade Content to keep up with regulatory changes</td>
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<tr>
<td>• Mastering your zone: Tips and tricks for ONESOURCE FTZ software</td>
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<tr>
<td>• Classification corner: New tools, new technologies with ONESOURCE Global Classification</td>
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<tr>
<td>• GTM Health Checks and Platform Tools</td>
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<td>• Tips to ensure a smooth ONESOURCE Global Trade implementation</td>
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<td>• Best practices to stay compliant using ONESOURCE Export Management and AES for GTM</td>
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<td>• Auto solicitation and savings through ONESOURCE FTA Management software</td>
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<td>• Best practices: Training makes for better compliance</td>
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<td>• Trade modernization: Does CBP’s 21st Century Customs Framework meet the challenges?</td>
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<td>• How to determine if an FTA is right for you</td>
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<td>• Mitigating risk in your supply chain: Forced labor and China trade policies</td>
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### CERTIFICATION EXAMS

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<td>Content Harmonized Solution</td>
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