

ONESOURCE WORKSHOPS

DIRECT TAX | INDIRECT TAX

INSTRUCTOR-LED TRAINING – WORKSHOPS

University-style workshops offer an opportunity to interact with other customers while providing an in-depth look at product functionality and features. Best practices are highlighted during these sessions to help optimize processes using ONESOURCE solutions. Workshops are offered as remote workshops or at regional Thomson Reuters-hosted facilities. Remote workshops allow attendees to participate in a hands-on training experience without leaving their desk. Regional workshops allow for the benefit of collaborating with other attendees looking to achieve common goals in locations that are interesting to explore when not in training.

KEY BENEFITS

- **Flexibility:** Select the type of Instructor-Led Workshop (Regional or Remote) that best meets your needs
- **Availability:** Many date options available to meet your schedule
- **Collaboration:** Interact with expert trainers and peers to share best practices and optimize use of ONESOURCE solutions
- **Expertise:** Learn from experienced trainers with updated, interactive material covering both product demonstrations and hands-on exercises

Below is a listing of all our scheduled workshops. For real time information, please visit [ONESOURCE University](#) where all our workshops are posted as well as availability, detailed course descriptions, agendas, and any pre-requisite materials that may be required.

DIRECT TAX WORKSHOPS

Workshop Title	Price	Dates	Location	Description
ONESOURCE Income Tax RS Comprehensive Domestic Workshop	\$2,000 per person	2/02/21 – 2/04/21	Remote	This 3-day workshop will guide participants through the tax administrator functions and the federal and state tax return preparation process using hands-on exercises to reinforce key concepts.
		3/09/21 – 3/11/21		
		3/23/21 – 3/25/21		
		4/06/21 – 4/08/21		
		4/20/21 – 4/22/21		
		5/04/21 – 5/06/21		
		5/18/21 – 5/20/21		
		6/08/21 – 6/10/21		
		6/22/21 – 6/24/21		
		7/13/21 – 7/15/21		
		7/20/21 – 7/22/21		
		8/03/21 – 8/05/21		
		8/17/21 – 8/19/21		
		8/31/21 – 9/02/21		
12/07/21 – 12/09/21				
12/14/21 – 12/16/21				
ONESOURCE Tax Provision Comprehensive Workshop	\$2,000 per person	1/19/21 – 1/21/21	Remote	This workshop will guide end-users and administrators through the use of ONESOURCE Tax Provision to prepare federal and state tax provisions, use standard and detailed reports to review the calculations, and populate data using various data entry tools. This course utilizes a combination of advance preparation eLearning and in-class hands-on activities to reinforce key concepts
		2/09/21 – 2/11/21		
		3/09/21 – 3/11/21		
		4/13/21 – 4/15/21		
		5/18/21 – 5/20/21		
		6/15/21 – 6/17/21		
		8/10/21 – 8/12/21		
		9/13/21 – 9/15/21		
		10/26/21 – 10/28/21		
		11/02/21 – 11/04/21		
		11/18/21 – 11/20/21		
		11/30/21 – 12/02/21		
12/07/21 – 12/09/21				

12/14/21 – 12/16/21

ONESOURCE Income Tax RS Comprehensive International Workshop	\$2,000	3/02/21 – 3/04/21	Remote	This workshop will guide participants through the tax administrator functions and the international tax return preparation process using hands-on exercises to reinforce key concepts.
	per person	4/13/21 – 4/15/21		
		5/11/21 – 5/13/21		
		6/15/21 – 6/17/21		
		7/13/21 – 7/15/21		
		8/17/21 – 8/19/21		
		9/21/21 – 9/23/21		
ONESOURCE DataFlow Comprehensive Workshop	\$2,000	3/29/21 – 3/30/21	Remote	This 2-day workshop will guide participants through the tax administrator functions and the federal and state tax return preparation process using hands-on exercises to reinforce key concepts.
	per person	6/14/21 – 6/15/21		
		8/23/21 – 8/24/21		
		11/22/21 – 11/23/21		

DIRECT TAX WORKSHOPS – NEW FOR 2021

Workshop Title	Price	Dates	Location	Description
ONESOURCE Tax Provision Upgrade Workshop	\$500 per person	1/25/21	Remote	This 4-hour workshop will guide end users and administrators through the navigation and functionality of Tax Provision v2016, differences between v2016 and v2014, and core navigational processes in v2016. Instructors use hands-on exercises to reinforce key concepts.
		4/26/21		
		7/12/21		
		10/4/21		
ONESOURCE Workpapers For Provision Workshop	\$500 per person	2/01/21	Remote	This 4-hour workshop will guide participants through the use of features, benefits, and navigational processes for ONESOURCE Workpapers. Attendees will learn to create workpapers that receive and send data and calculations in ONESOURCE Tax Provision using hands-on exercises to reinforce key concepts.
		5/03/21		
		7/19/21		
		10/11/21		
ONESOURCE Estimated Payments	\$500 per person	3/08/21	Remote	This 4-hour workshop will guide participants through the essential functions of the ONESOURCE Estimated Payments application, using a combination of lecture and demo to reinforce key concepts.
		5/24/21		
		8/02/21		
		10/25/21		
ONESOURCE General Ledger Manager	\$500 per person	3/15/21	Remote	This 4-hour workshop will guide participants through the essential functions of ONESOURCE General Ledger Manager application using hands-on exercises to reinforce key concepts.
		6/07/21		
		8/09/21		
		11/01/21		
ONESOURCE State Apportionment Workshop	\$1,000 per person	3/22/21	Remote	This 8-hour workshop will guide participants through the administrator and preparer functions of ONESOURCE State Apportionment application, including transferring data to other ONESOURCE applications, using hands-on exercises to reinforce key concepts.
		5/10/21		
		7/26/21		
		10/18/21		
ONESOURCE Calendar	\$1,000 per person	3/01/21	Remote	This 8-hour workshop will guide participants through the administrator functions and ONESOURCE Calendar functionality using hands-on exercises to reinforce key concepts.
		5/17/21		

ONESOURCE Workflow Manager	\$2,000 per person	4/12/21 – 4/13/21	Remote	This 16-hour workshop will guide participants through using the ONESOURCE WorkFlow Manager suite of applications, including administrator functions, using hands-on exercises to reinforce key concepts.
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INDIRECT TAX WORKSHOPS

Introduction to ONESOURCE Determination (Legacy UI)	\$1,500 per person	3/16/21 – 3/18/21	Remote	This class is intended to provide new or veteran users with a common understanding of the ONESOURCE Determination solution: its value proposition, place within a client's business processes, and technology components. The course is meant for those who will be working with the software either directly (tax professionals) or indirectly (implementers, developers). This is a hands-on course. Additional Information
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Introduction to ONESOURCE Determination Cloud (New UI)	\$1,500 per person	1/19/21 – 1/21/21 2/09/21 – 2/11/21 2/23/21 – 2/25/21 3/09/21 – 3/11/21 3/23/21 – 3/25/21	Remote	This class is intended to provide participants with a greater understanding of the ONESOURCE Determination Cloud (New UI) application. Additional Information
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Advanced ONESOURCE Determination Training (Legacy UI)	\$1,000 per person	1/19/21 – 1/20/21 3/02/21 – 3/03/21	Remote	This class is intended to provide participants with a greater understanding of the ONESOURCE Indirect Tax determination software solution. Topics include more in-depth examination of TransEditors, rule qualifiers, reference lists and other features of the solution. Additionally, the course details system tips and tricks and advanced support topics. This is a hands-on course. Additional Information
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Intro to ONESOURCE Compliance for Sales & Use Tax	\$1,500 per person	1/25/21 – 1/27/21 2/23/21 – 2/25/21 3/23/21 – 3/25/21	Remote	This class is intended to provide new users with a common understanding of the ONESOURCE Compliance solution and its UI components. The course is meant for those who will be working with the software directly (tax professionals). This is a hands-on course. Additional Information
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ONESOURCE Determination Integration for SAP Global Next	\$1,000 per person	1/28/21 – 1/29/21 3/04/21 – 3/05/21	Remote	This course will guide new users through a hands-on approach to sending and receiving data between SAP and Determination. Users will also configure and read log files to verify transaction accuracy. Additional Information
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Advanced ONESOURCE Compliance for Sales & Use Tax	\$1,000 per person	1/28/21 – 1/29/21 3/30/21 – 3/31/21	Remote	This course guides new and experienced users through a greater understanding of the ONESOURCE Indirect Compliance for Sales & Use Tax software solution. Topics include in-depth examination of
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Location reporting, place codes, in-line adjustments and e-filing. Additionally, the course details system tips and tricks and advanced support topics. This is a hands-on course. [Additional Information](#)
