



# Workpapers

## Enjoy an enhanced workpapers solution

Tax reform — like the Tax Cuts and Jobs Act (TCJA) — brings yet another level of scrutiny. The new data requirements create the need to put a technology in place that can collect, store, and quickly report your data without risking loss of data. Data management also needs to be more efficient than ever to effectively implement the changes from reform.

Are you ready to stay on the right side of disruption? ONESOURCE® Workpapers is the next evolution of workpaper technology for the Direct Tax suite. Our suite of tools provides capabilities that allow customers to manage a variety of workpaper scenarios.

ONESOURCE Workpapers empowers users to pull or push data from any on-boarded ONESOURCE applications. Users can build ad-hoc calculations, summary schedules, and data comparisons all within the familiar environment of Microsoft® Excel.

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## Key Benefits and Features



### Enhanced integration with ONESOURCE applications

- Users can create workpapers and stand-alone/ad-hoc calculations using native Excel
- Configure Excel functions to push and pull data across ONESOURCE applications
- Ability to pull both calculated and stored values from ONESOURCE applications
- ONESOURCE Workflow Manager and FileRoom integration for all ONESOURCE Workpaper scenarios
- Backwards compatibility with ONESOURCE DataFlow and Data Import Add-in



### Superior inventory management

- Manage all Excel workpapers in secure cloud environment
- Recent work displayed at top of home page allows users to return to last activity with one click
- Enhanced search/filter/grouping functionality makes it easier to organize and find workpapers
- New “Google-like” search on workpaper content
- Batch processing allows users to process workpapers in user defined sequence



### Simplified user experience

- Simplified approach to building configurable push and pull functions
- Flexible mapping approach for your current workpapers
- Streamlined rollover process
- Email notifications, lists, and status/actions managed centrally and reusable across templates
- Check out workpapers and work offline



### Strong internal controls to mitigate spreadsheet risk

- Improved version control with native rollback functions
- Snapshot allows users to make a point in time copy of a workpaper and send to FileRoom or a third party (e.g., auditor)
- User access can be granted or restricted based on workpaper attributes/properties

Don't hesitate — stay on the right side of disruption with **ONESOURCE Workpapers**, the next evolution of workpaper technology for the Direct Tax suite.

### Contact Us Today

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