

# ONESOURCE DataFlow 2018

## CIP Orientation Package

This packet will augment the standard release documentation, such as release notes. You should not distribute this package to your clients; however, you can use this as a basis for your internal documentation or in the creation of needed external documentation.

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## DataFlow 2018 Release – High-level description of release.

DataFlow 2018 is the next generation of the current DataFlow product. DataFlow offers customers a highly flexible yet controlled environment to conduct and manage their data collection and workpaper standardization needs. DataFlow 2018 takes this core value and builds upon it with a modern and improved user experience, integration with common platform capabilities, performance improvements to collect data faster, and expanded language support to help facilitate global data collection.

### Elevator Pitch

#### Prospects -

MNCs often collect data from different resources around the globe throughout the tax lifecycle. These processes are often managed via a combination of excel files and emails causing an administrative and organizational burden.

DataFlow 2018 eases this burden, operating as a central hub for data collection and workpaper standardization throughout ONESOURCE. DataFlow creates a common template which can be leveraged across multiple entities to collect and centralize data. This template minimizes the administrative burden of managing multiple excel files and versions. DataFlow 2018 not only helps manage the data collection effort but also facilitates the process and communication providing visibility throughout.

Regardless of the type of data tax departments collect, DataFlow 2018 will offer standardization and control to manage this process.

#### Current Clients-

DataFlow 2018 is the next generation of the current DataFlow product. DataFlow is widely used by ONESOURCE clients to collect and aggregate data for various processes. DataFlow has been completely rebuilt from the ground up with a modern and improved user experience. DataFlow 2018 integrates with the common platform capabilities around entities, users, and documents centralizing the storage and maintenance of these items on the platform. Additionally, new DataFlow functions will increase performance and efficiency of templates offering greater flexibility in the data collection process.

DataFlow 2018 takes the power and value of the current DataFlow product and brings it forth into the next generation of ONESOURCE.

## DataFlow 2018 Release – Feature List & Key Benefits

Feature List		Key Benefits	
1.	Modern and Improved User Experience	1.	The new look and feel of DataFlow 2018 provides users with an intuitive user interface enabling tasks to be completed more easily in less time. Additionally, the application can now be accessed via any browser
2.	Integration with Common Entities on the ONESOURCE Platform	2.	Entities, Domains, and Jurisdictions are now common attributes stored on the ONESOURCE Platform. As a result, they can be managed in a centralized fashion eliminating duplicative efforts.
3.	New DataFlow Functions	3.	The new table structures consolidate the template design functionality into a single concept. This new structure brings the necessary flexibility as well as performance of the previous concepts.

4. Integration with New Document Management System	4. DataFlow attachments will be stored in the new Document Management System.
5. Expanded Language Support	5. The DataFlow 2018 user interface can be translated into languages other than English. This provides foreign users with a more comfortable and familiar experience working in their local language.
6. External APIs	6. External APIs enable customers to integrate 3 <sup>rd</sup> party systems with DataFlow, expanding and extending the capabilities of ONESOURCE.

## DataFlow 2018 Release – Functionality Details

<b>1. Modern and Improved User Experience</b>
Value: Minimize clicks, streamline processes, decrease adoption time
Key Features: <ul style="list-style-type: none"> <li>New user interface aligns the look and feel of DataFlow with other ONESOURCE products</li> <li>Streamlined screens enable users to complete tasks more efficiently</li> </ul> Benefits: <ul style="list-style-type: none"> <li>Users have a holistic and consistent user experience when moving between ONESOURCE products</li> <li>Less clicks results in less time completing tasks and more time on other value-added activities</li> </ul>
<b>2. Integration with Common Entities on the ONESOURCE Platform</b>
Value: Reduced administrative burden, centralized common administration of entities, domains, jurisdictions and users
Key Features: <ul style="list-style-type: none"> <li>DataFlow 2018 will source entities, domains, and jurisdictions from common entity on the platform</li> <li>This will become the common location where all ONESOURCE product store and manage these common attributes</li> </ul> Benefits: <ul style="list-style-type: none"> <li>Users can manage common attributes across multiple ONESOURCE products in a common location saving time and increasing efficiency</li> </ul>
<b>3. New DataFlow Functions</b>
Value: Optimize the design and format of templates to gain the greatest performance and flexibility for data collection
Key Features: <ul style="list-style-type: none"> <li>New table structures replace current Block, Table, Wildcard, and Repeating Cell Name structures</li> <li>New formulas enable users to access data stored within new table structures in a dynamic fashion</li> </ul> Benefits: <ul style="list-style-type: none"> <li>The simplified data structures and formulas will reduce complexity within templates</li> <li>New data structures and formulas will also enable greater performance improvements of templates</li> </ul>
<b>4. Integration with new Document Management System</b>
Value: Store documents and attachments in a common platform location

**Key Features:**

- New document management system will store all DataFlow 2018 documents which are attached to requests
- Documents will adopt properties of the request they are attached to
- Drag and drop functionality to attach documents

**Benefits:**

- All documentation which supplements the data collection process will be stored in a centralized location
- New drag and drop functionality streamlines the process of attaching documentation to requests

**5. Expanded Language Support**

Value: Comfort and familiarity viewing product in local language

**Key Features:**

- DataFlow 2018 web screens will be translatable into multiple languages beyond English
- Eventual alignment with platform languages

**Benefits:**

- Viewing DataFlow 2018 in local language decreases adoption time, increases efficiency and saves time

**6. External APIs**

Value: Extend the capabilities of DataFlow 2018 beyond the ONESOURCE user interface

**Key Features:**

- Request Management API – exposes attributes of the DataFlow request grid via an external API
- Request Data API – exposes request data from DataFlow via an external API

**Benefits:**

- Allows external developers to connect the data and content of DataFlow 2018 to their custom software applications
- Clients can leverage data and content from ONESOURCE products to build custom products and reporting tools to interact with ONESOURCE and report on data

**Functionality Comparison between prior version & latest version**

TOPIC	CURRENT DATAFLOW	DATAFLOW 2018
1. Entities, Tax Types, Jurisdictions	<ul style="list-style-type: none"> <li>• Entities created and stored in Entity Manager</li> <li>• Tax Types and Jurisdictions created and stored in Fileroom indexes</li> </ul>	<ul style="list-style-type: none"> <li>• Entities stored in the Common Entity on Platform</li> <li>• Tax Types (Domains) and Jurisdictions stored as standard lists on Platform</li> </ul>
2. DataFlow Functions	<ul style="list-style-type: none"> <li>• Different data structures can be used to design templates</li> <li>• Block, Table, Wildcard, Repeating Cell Name</li> </ul>	<ul style="list-style-type: none"> <li>• One table structure available for design</li> <li>• New Tables offer greater performance and flexibility</li> </ul>
3. Documents	<ul style="list-style-type: none"> <li>• DataFlow documents attached to requests are stored in Fileroom</li> <li>• Documents inherit index values of requests for searchability</li> </ul>	<ul style="list-style-type: none"> <li>• DataFlow documents attached to requests are stored in new Document Management system.</li> <li>• Documents inherit properties of the requests they are attached to</li> </ul>
4. Notifications	<ul style="list-style-type: none"> <li>• Managed within DataFlow</li> </ul>	<ul style="list-style-type: none"> <li>• Managed on the Platform</li> </ul>

## DataFlow 2018 Transition Path

The release of DataFlow 2018 will not bring about an end of life for the current DataFlow product. Current clients who license DataFlow will not be forced to transition over to DataFlow 2018 until they are prepared to do so.

Automatic migration to the new product will not be available. The new functionality around DataFlow functions, documents, entities, and other common attributes precludes the availability of an automatic transition. Historical data can continue to be accessed via the current DataFlow product.

The transition to DataFlow 2018 should be positioned as a reflection point for customers to review their current process and templates and optimize them as they move into the new product. The new DataFlow functions were designed to improve performance and flexibility within templates. Clients should review this new functionality to consider how to implement into current processes.

Tools will be developed to help customers review and convert templates from the current DataFlow functions to the new functions available in DataFlow 2018.

## FAQ

### When is the release date for DataFlow 2018?

August 23<sup>rd</sup>, 2018

### What are the key differentiators between current DataFlow and DataFlow 2018?

- Modern and improved user interface
  - Alignment with the look and feel of other ONESOURCE products
  - Simplified user experience with less clicks
- New optimized table functions for template design
  - New DCTable structure replaces Block, Table, Wildcard, Repeating Cell Name
  - Improved performance and flexibility in template design
- Integration with common platform capabilities (entities, domains, jurisdictions, users, documents)
  - Common components managed centrally through Platform Administration Tile
- Expanded language support
  - Local language translation of user interface for ease of use and globalization
  - Brazilian Portuguese will be the first available language

### Where is DataFlow 2018 hosted?

DataFlow 2018 is hosted in Thomson Reuters' Amazon Web Services (AWS) which is managed by the Thomson Reuters technology group. The initial release on 8/23 will be available in the US. DataFlow 2018 will become available in EMEA and APAC in future releases.

### Is the existing ONESOURCE DataFlow going away?

No. We will continue to support and maintain the existing tool, while our development teams will be actively building new features and functionality in DataFlow 2018.

### Do current clients automatically migrate to DataFlow 2018 when it is released?

No. Transitioning to DataFlow 2018 is an optional switch that can be made the client's discretion. As mentioned current DataFlow will continue to be supported.

### **How does a current client transition to DataFlow 2018?**

Transitioning to DataFlow 2018 should be positioned as an opportunity for clients to evaluate and optimize their current data collection process and needs. Depending on the complexity of current DataFlow templates, the amount of optimization needed can vary (see item below regarding “What happens to current DataFlow templates”). Once templates have been brought over to DataFlow 2018, additional setup components must be configured around status templates, action management, email templates, and custom lists. Once these components have been configured, administrators can begin creating requests and assigning them to users.

### **Will DataFlow 2018 be integrated with Workflow?**

No, DataFlow 2018 is separating from many of the current dependencies on WorkFlow and Fileroom. DataFlow 2018 will be a standalone data collection tool for ONESOURCE. The concept of a connection/integration with process management is being evaluated and rationalized as the next generation of WorkFlow is developed.

### **What happens to current DataFlow templates?**

Less complex templates can be supported within DataFlow 2018 with little or no manipulation. Templates that are more complex and robust may need to be optimized in order to function and be supported in DataFlow 2018. Utilizing our conversion tool, designers can evaluate their template to convert from the current DataFlow structures and functions to the new DataFlow 2018 functions and formulas.

### **What happens to my historical data after moving to DataFlow 2018?**

Historical data and requests can still be accessed and viewed via the current DataFlow product.