



Digital Gateway Lake Superior Release 1.3

January 31, 2025



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Welcome to Lake Superior 1.3 Release on Digital Gateway

Release Date: **January 31, 2025** ◆

The Digital Gateway Lake Superior 1.3 release is complete, effective January 31, 2025. This release includes new features and enhancements for the following Digital Gateway modules:

Legal Entity Management | Workflows | Document Extraction | Modeling Suite | Documents

Please view the release highlights below, followed by detailed release notes.

Release Highlights



Legal Entity Management

- ▶ Introducing new entity types, "Hybrid Partnership" and "Reverse Hybrid Corporation" for entities taxed differently across jurisdictions.
- ▶ Define different classifications (legal, tax, regulatory) per jurisdiction.
- ▶ New entity views on the org chart to easily focus on the information you need, from all subsidiaries, all owners, both owners & subsidiaries, and direct owners & subsidiaries.

Workflows

- ▶ View all consolidated deliverables by entity in Digital Gateway Workflows, allowing you to easily access and monitor deliverables and their statuses tied to an entity.
- ▶ New sign-off actions: Enable effective rework, gather more information once a task has been signed off, and automatically mark documents as final.
- ▶ The Workflows grid view settings will now be saved to ensure your preferred view is set each time you enter Digital Gateway Workflows, and even when switching between clients.

Continued on next page ►

Digital Gateway Lake Superior Release 1.3

January 31, 2025

KPMG Users Only

Release Highlights (Continued)



Document Extraction

- ▶ Perform tabular extractions and export tables directly into Excel.
- ▶ Extract various file types simultaneously, composing multiple forms per file within a single model.

Modeling Suite

- ▶ Complete data collection tasks using Modeling Suite and sign-off the associated Workflow task directly from the excel file.
- ▶ Model Administrators now have enhanced, granular control over user access and permissions in Modeling Suite.
- ▶ Faster data handling and improved data filtering

Documents

- ▶ Bug fixes from DG Documents release (released December 6, 2024), including the ability to now perform Bulk Downloads within DG Documents.

[View a detailed list of these new features and enhancements on the next page](#) ▶

Digital Gateway Lake Superior Release 1.3

January 31, 2025



KPMG Users Only

[Legal Entity Management](#) – [Workflows](#) – [Document Extraction](#) – [Modeling Suite](#) – [Documents](#)

Learning Resources (Internal Only)

Legal Entity Management

- ▶ [Release Review Video](#)
- ▶ [Legal Entity Management Video](#)
- ▶ [Legal Entity Management User Guide](#)

LEM – New Features

- ▶ **Track joint ventures and external entities.** New fields for “Client Purview” and “External Organization” enable you to differentiate between the client’s entities, joint ventures they have with other organizations, and entities that belong entirely to other organizations.
- ▶ **Enter long text attributes.** Attributes can now have the data type of “Long Text” to capture up to 500 characters of text for custom attributes. “Long Text” attributes cannot be displayed on the org chart due to their length, however, the existing “Text” data type continues to support up to 250 characters and can be displayed on the org chart.
- ▶ **View and search by entity code on the org chart.** The org chart now displays both the entity name and entity code so you can more easily identify and search for the entities you are interested in.
- ▶ **Display hybrid entities.** There are new entity types for “Hybrid Partnership” and “Reverse Hybrid Corporation” for entities taxed as a corporation in one jurisdiction and a partnership in another. The org chart has new shapes for these new entity types.

Continued on next page ▶

Digital Gateway Lake Superior Release 1.3

January 31, 2025



KPMG Users Only

[Legal Entity Management](#) – [Workflows](#) – [Document Extraction](#) – [Modeling Suite](#) – [Documents](#)

LEM – New Features (Continued)

- ▶ **Dummy client entity on the org chart has been removed.** This “fake” dummy entity on the org chart that represented the client has been removed.
- ▶ **Simplified legal entity group entry.** The Workflow-specific “Legal Entity Group” field has been combined with the “Entity Groups” table for streamlined entry, reduced input errors, and easy filtering of the legal entity group on the org chart. To enter the “Legal Entity Group” that Workflows, Documents, and other systems use, select the value in the “Entity Groups” table and mark it as the primary group for the entity.
- ▶ **Track BEPS Pillar 2 classifications.** There is a new BEPS Pillar 2 section that captures BEPS classifications in alignment with KPMG BEPS 2.0 Automation Technology (KBAT).
- ▶ **Show/hide entities with no relationships on the org chart.** By default, the org chart hides entities without any relationships in the structure. You can choose to show these entities from the “Chart Options” menu.
- ▶ **Show/hide inactive entities.** Entities that have been terminated (using the “Termination Date” field) can now be hidden in the Entity List using the “Hide Inactive Entities” toggle.
- ▶ **New jurisdiction classification data points.** You can now define different jurisdiction classifications for different classification types (legal, tax, regulatory). Additionally, an Entity Type is captured per classification. This will enable future capabilities of viewing different shapes on the org chart for an entity based on jurisdiction and classification type.
- ▶ **Cookie notice.** A cookie notice is now available from your user profile menu, allowing you to manage your cookie preferences.

Continued on next page ►

Digital Gateway Lake Superior Release 1.3

January 31, 2025



KPMG Users Only

[Legal Entity Management](#) – [Workflows](#) – [Document Extraction](#) – [Modeling Suite](#) – [Documents](#)

LEM – New Features (Continued)

- ▶ **New entity views on the org chart.** When you choose to view a specific entity on the org chart, you now have 4 options to view its surrounding structure:
 1. All Subsidiaries – shows all the way down the structure
 2. All Owners – shows all the way up the structure
 3. Owners & Subsidiaries – shows all the way up and down
 4. Direct Owners & Subsidiaries – shows 1 level up and down

This selection is available in the “Chart Options” menu as the “Entity View”.

LEM – Enhancements

- ▶ **Support for longer entity names.** An entity's name can now be up to 150 characters, expanding the previous limit of 75 characters.
- ▶ **Improved org chart performance.** You will observe that the org chart now loads faster, particularly for large clients, since information is retrieved only as needed.

Up Next: **Workflows** ▶

Digital Gateway Lake Superior Release 1.3

January 31, 2025



KPMG Users Only

[Legal Entity Management](#) – [Workflows](#) – [Document Extraction](#) – [Modeling Suite](#) – [Documents](#)

Learning Resources (Internal Only)

Workflows

- ▶ [Release Review Video](#)
- ▶ [Digital Gateway Workflows User Guide](#)
- ▶ [Digital Gateway Workflows Management Video](#)

Workflows – New Features

- ▶ **Return for changes.** When rework is required, signing off on the current task may not be appropriate. The "Return for Changes" action allows assignees to automatically route the workflow back to a pre-configured prior task for revision. Depending on the routing configuration, intermediate tasks can either remain completed or be reopened up to the specified prior task. *If no specific routing is configured, the "Return for Changes" action will default to reopening the previous task.*
- ▶ **Comments for task sign-off.** Selected tasks can be configured to require a reason or comment during sign-off.
- ▶ **Finalize documents during sign-off.** When signing-off a task, a pre-configured setting will automate the tagging of documents to be "Final".
- ▶ **User preferences for the Workflows grid view are now saved.** You can sort, rearrange, hide, or enable columns, and your customized view will be ready each time you reconnect to DG Workflows. These settings will be consistently applied across all clients for you.
- ▶ **Manage deliverables by Entity.** Getting a clear picture of all filing/reporting obligations for an Entity is now possible through the Entities page of DG Workflows. Select an entity to review deliverable statuses, manage tasks, assignments, or other workflow components.

Continued on next page ▶

Digital Gateway Lake Superior Release 1.3

January 31, 2025



KPMG Users Only

[Legal Entity Management](#) – [Workflows](#) – [Document Extraction](#) – [Modeling Suite](#) – [Documents](#)

Workflows – New Features (Continued)

- ▶ **Reply to a specific comment.** You can now reply directly to specific comments, allowing for more streamlined collaboration and tracking of conversations.
- ▶ **New 'Contact Support' experience.** When clicking the 'Contact Support' link, you will be directed to the Global Tax Customer Service Portal, replacing the previous text box functionality. This enhanced experience automatically pre-fills client and module context information and allows you to attach supporting files. Ticket requests are sent directly to the Global Support team. *This integration will keep extending to other Digital Gateway modules in future releases.*

Workflows – Infrastructure Features

- ▶ **Workflows integration with the Digital Gateway Core Taxonomy.** To ensure consistency across the entire Digital Gateway Platform, standard naming conventions and values will now be established and managed via the Platform Administration. Digital Gateway Workflows is now ready to consume and apply these values. This standardization will be completed across the other Digital Gateway modules in upcoming releases.

Up Next: **Document Extraction** ▶

Digital Gateway Lake Superior Release 1.3

January 31, 2025

KPMG Users Only

[Legal Entity Management](#) – [Workflows](#) – [Document Extraction](#) – [Modeling Suite](#) – [Documents](#)

Learning Resources (Internal Only)

Document Extraction

- ▶ [Release Review Video](#)
- ▶ [Document Extraction Quick Reference Guide](#)
- ▶ [User Guide](#)
- ▶ [Model Management Guide](#)
- ▶ [Training Videos](#)

Document Extraction – New Features

- ▶ **Export table extractions in Excel.** In addition to the existing JSON export for table extractions, a standard Excel export is now available, eliminating the need for additional conversion steps.
- ▶ **Support for Microsoft Document Intelligence Pre-built Model Structure.** This update allows for the extraction of different types of files simultaneously by determining the appropriate model for each document. Multiple forms per file can be composed within a single model. The US Personal Tax Model includes forms such as W-2, 1098, 1098-E, 1098-T, 1099, 1040, 1095A, and 1095C, which can be used individually or as part of the model.
- ▶ **Auto-updating of composed models.** Composed models now automatically update to incorporate changes from any updated child custom models. While these models support changes in both the composed model and updated child custom models, manual updates are still required to finalize these changes.

Continued on next page ▶

Digital Gateway Lake Superior Release 1.3

January 31, 2025

KPMG Users Only

[Legal Entity Management](#) – [Workflows](#) – [Document Extraction](#) – [Modeling Suite](#) – [Documents](#)

Document Extraction – New Features (Continued)

Document Extraction as a Service

- ▶ **Connect to another application storage account.** Introducing a new integration method for downstream applications to process documents. This feature allows for secure connections to disparate storage blobs or folders to Document Extraction.
- ▶ **Batch processing.** Enables the bulk processing of up to 10,000 documents using a single operation request.
- ▶ **Enhance extraction results using additional features:**
 - High Resolution
 - Query Fields
 - Formulas
 - Barcodes
 - Languages
 - Key Value Pairs

** Since this is a service, files and extraction results remain on the client side. The extractions are not stored in the Document Extraction system. Instead, results can be viewed directly through the connected downstream applications.*

Continued on next page ►

Digital Gateway Lake Superior Release 1.3

January 31, 2025



KPMG Users Only

[Legal Entity Management](#) – [Workflows](#) – [Document Extraction](#) – [Modeling Suite](#) – [Documents](#)

Document Extraction – Infrastructure Features

- ▶ **Additional region support expanding to US region.** With the introduction of this additional region, clients will be migrated to their preferred region as requested during onboarding.
- ▶ **Allow for models to be replicated from region to region.** The original model, which resides in a single region, will maintain ownership and include the training data. Any updates should be made on the original model, after which they can be replicated to other regions.
- ▶ **Introduction of a rotating queue of requests.** The system will now rotate through extraction requests to ensure that a large extraction request does not prevent other extractions from proceeding. By alternating between high and low volume queues, the system ensures that large document uploads do not delay processing for other users.

Up Next: **Modeling Suite** ▶

Digital Gateway Lake Superior Release 1.3

January 31, 2025



KPMG Users Only

[Legal Entity Management](#) – [Workflows](#) – [Document Extraction](#) – [Modeling Suite](#) – [Documents](#)

Learning Resources (Internal Only)

Modeling Suite

- ▶ [Quick Reference Guide](#)
- ▶ [KPMG Income Tax Insights](#)

Modeling Suite – New Features

- ▶ **Faster Data Handling.** Working with large datasets is now faster. You will observe a noticeable improvement in speed when engaging with certain features, such as utilizing the "push" function located in the right-hand pane and calculating entity tiers for extensive datasets.
- ▶ **Improved Data Filtering.** When "pulling" data from datasets using the right-hand pane, you can now use wildcards in your filters to easily filter the data within the dataset.
- ▶ **Integration with DG Workflows.** Complete data collection tasks using Modeling Suite and sign-off the associated Workflow task directly from the right-hand pane, enhancing the user experience of not having to move between multiple modules.
- ▶ **Questionnaire UI update.** Citizen developers and other users can now run automation features through the right-hand pane using questionnaires, making the process more user-friendly.
- ▶ **DG Fabric Integration.** Seamlessly transfer data from the Modeling Suite database to DG Fabric and make the data available within the wider DG Data Ecosystem.

Continued on next page ▶



Digital Gateway Lake Superior Release 1.3

January 31, 2025



KPMG Users Only

[Legal Entity Management](#) – [Workflows](#) – [Document Extraction](#) – [Modeling Suite](#) – [Documents](#)

Modeling Suite – Bug Fixes

- ▶ Issues with updating model parameters have been fixed.
- ▶ Problems with manually sending data have been fixed.
- ▶ Duplicate sheet sections not displaying correctly have been fixed.
- ▶ Issues with sheets remaining unlocked inappropriately have been fixed.

Up Next: **Documents** ▶

Digital Gateway Lake Superior Release 1.3

January 31, 2025



KPMG Users Only

[Legal Entity Management](#) – [Workflows](#) – [Document Extraction](#) – [Modeling Suite](#) – [Documents](#)

Learning Resources

DG Documents

- ▶ [Release Review Video](#)
- ▶ [Change Management Guide](#)
- ▶ [Navigating DG Documents Video](#)
- ▶ [DG Documents User Guide](#)
- ▶ [Detailed DG Documents Video](#)
- ▶ [DG Connector User Guide](#)

Documents – New Features

- ▶ **Bulk download documents directly from DG Documents.** Enhance your efficiency with the Bulk Download capability, enabling you to download multiple documents directly from DG Documents. The progress of your download is displayed on the screen, allowing you to continue navigating DG Documents until the process is complete. *Please note that there is a limit of downloading 3,000 documents at a time.*
- ▶ **Ability to filter by specific tasks and Deliverables in Connector (formerly known as Export Connector)** . These options enable you to refine your exports by including only specific task or deliverables, ensuring that you export only pertinent data to enhance your productivity.

Documents – Enhancements

- ▶ **Renaming of "Export connector" to "Connector"**. This new name more accurately represents its capabilities, as it facilitates both data export and import.
- ▶ **Connector User Guide Access.** A direct link to the User Guide in the User Profile pane is now available. Now, you can quickly find detailed instructions on using "Connector" without leaving your current workflow.

Continued on next page ▶



Digital Gateway Lake Superior Release 1.3

January 31, 2025



KPMG Users Only

[Legal Entity Management](#) – [Workflows](#) – [Document Extraction](#) – [Modeling Suite](#) – [Documents](#)

Documents – Technical Items

- ▶ **Track user login.** To enhance DG Documents ability to support and manage the user activities, users' last login information will now be shared and made available within the DG Platform analytics.
- ▶ **Migration to Function App.** Connector has transitioned export transformations from ADF pipelines to a function app. This change will significantly reduce costs and improve processing speed.

Up Next: Information on Upcoming DG Releases ►

Digital Gateway Lake Superior Release 1.3

January 31, 2025

KPMG Users Only

[Legal Entity Management](#) – [Workflows](#) – [Document Extraction](#) – [Modeling Suite](#) – [Documents](#)

Looking Ahead to the next Digital Gateway Releases

Here is a preview of upcoming features that will be part of the DG Platform Module releases. A full feature list and release information will be shared as we get closer to the release date.

► Legal Entity Management

Display workflows tied to an entity



► DG Platform

Core Taxonomy configurations to be consumed by all the Digital Gateway modules and applications.



► Workflows

Integration with Outlook to perform task actions via email



► Smart Questionnaire

Roll forward requests without having to rebuild the questions every cycle



View the Product Release Roadmap [here](#) (Internal Only)

To view information about past Digital Gateway releases, please visit the [Digital Gateway Resource Center - Release Information Page](#). (Internal Only)