ONESOURCE DataFlow

Optimize your data management process so tax can be your focus

Enhance your tax packages and workpapers

In tax, every minute counts. Unfortunately, many tax departments spend too much time managing and consolidating Microsoft® Office Excel tax packages, resending new versions, and figuring out who has responded. What if you could preserve the familiarity your company has with existing tax packages, while adding structured storage, greater control, and visibility? ONESOURCE makes it possible. With ONESOURCE® DataFlow, standardize your existing tax packages and workpapers with controls, validation, year-over-year data recall, and automated rollovers to reduce preparation time and flow data directly from the source to your tax applications. Increase efficiency across your data management processes and focus on more value-add activities. Save time and boost accuracy by eliminating the need to track manually using Outlook to work out who has sent what information.

Share information from across the world with a data management process that is truly global. Easily collect data from individuals around the globe with DataFlow, using a modern and intuitive user interface.

Familiar navigation

Go above and beyond with templates that suit your organization's workflow. DataFlow extends the capabilities of Excel, so you can develop customizable web-based templates to suit your preferred style. Enhance your existing Excel-based workpapers or tax packages and easily load them into DataFlow where the requests can be sent out as a familiar Excel data collection workbook. With DataFlow, there's no need to spend time navigating a new process.

new versions. This is particularly helpful if your requirements change during the process.

- Once the data is entered by the provider, it's never rekeyed, thus, eliminating any chance of a transcription error
- Eliminates version issues of the tax package that is sent out, ensuring that only one active workbook is in circulation
- Data is stored in a central repository, allowing for easy review, consolidation, and scrubbing — all from Excel

Simple data loading and reviewing

The Excel add-In feature within ONESOURCE DataFlow makes loading data easy. It maps and transfers data across the ONESOURCE platform such as into ONESOURCE Income Tax or ONESOURCE Tax Provision — without ever needing to launch the software.

- Authorized individuals can quickly and easily extract the necessary data for reporting or for rapid transfer into other applications
- Easily identify worksheet errors such as duplications, incorrect codes, and miscalculations before data is loaded to your ONESOURCE product — preventing time-consuming edits, corrections, and additional review
- Receive all the accurate data you need up front with built-in diagnostics and validations. Eliminate back and forth with your data providers to request additional data
- Import scripted results from spreadsheets containing Macros or Visual Basic without having to remove those elements

Flexible data collection

Easily distribute and monitor your data collection requests, and send automated and ad-hoc reminders to ensure timely completion. DataFlow enables secure access for all internal and external sources of data in your process. Documents and notes can be attached to data collection requests for improved communications and the gathering of pertinent information. Make updates to the template at any time without affecting previously collected data. See changes in real-time within your data request, without having to re-send

Easy access to key data

Access all the data you collect in way that suits your organization. DataFlow is API enabled so you can manage your entire process using the tools of your choice. Create custom dashboards with easy access to information that has been regularly updated. Present clear and precise information in a way that allows your stakeholders to better understand your data.

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