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# Thomson Reuters Professional Services

## Training Catalog

| 2025



# Welcome

Welcome to our **Thomson Reuters Professional Services** Training catalog!

We are passionate about training, and we continuously look for ways to enhance your training experience so you can easily find the training you need, when you need it.

In this catalog you will find a wealth of information including the type of training we offer and a comprehensive list of all our courses and certifications by product. Can't find what you are looking for? Have a suggestion on a new course or certification? If so, please let us know! We want nothing more than to receive feedback directly from our valued Clients and Partners.

We are all faced with constant change. Whether that change stems from product changes or changes within tax and regulatory compliance, we support and keep pace with that change. The traditional "one and done" training model is not an effective training program. Successful training programs use both instructor-led and eLearning delivery methods with a focus on interactive, real-life, and engaging content. This blended approach not only uses the most effective delivery type but is also flexible and can be tailored to each user's needs and learning preferences. Our experienced designers and experts use this approach to ensure our training content is timely, accessible, and relevant so you can continue to grow your ONESOURCE product knowledge and expertise.

Thanks for being a ONESOURCE User and Client! Welcome to our Professional Services Training catalog.

## DEANNA MCDONALD

*Vice President, Professional Services*

*Customer and Partner Training*

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# Who we are

Professional Services provides product training and certification programs that empower our corporate clients to become successful users of the ONESOURCE solution.

We know for a fact: training is a critical success factor for software implementation and ongoing proficiency. Inspired by this motto, every day our dozens of tax experts and learning professionals come together to design and deliver training solutions that help our corporate clients to make the most out of the software solutions they use to run their tax departments.

We believe that learners learn by doing, that training increases employee engagement and satisfaction, and that training is proven to help clients realize their goals. Whether the need is a dedicated instructor-led session, a few workshop seats, a timely WebSeminar, or an on-demand product training course – we strive to empower all ONESOURCE users to be efficient users of our products.

In our new and modern online learning platform, you'll find training resources on a variety of Thomson Reuters global tax products for corporations, including Direct Tax, Indirect tax, Statutory Reporting, Global Trade, among others.

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## TAX | ONESOURCE Global Tax Products

Direct Tax  
Data and Process Management  
Statutory Reporting  
Indirect Tax  
Global Trade



## Curriculum

### Direct Tax

- Income Tax RS Domestic and International
- Tax Provision
- State Apportionment
- Corporate Tax - Europe

### Data and Process Management

- WorkFlow Manager
- DataFlow
- Calendar
- General Ledger Manager
- Audit Manager

### Statutory Reporting

### Indirect Tax

- Determination
- Indirect Tax Compliance – VAT
- Indirect Tax Compliance – Sales & Use
- Certificate Manager
- Integrations

### Global Trade

- Denied Party Screening
- Global Classification
- Foreign Trade Zones
- Free Trade Agreements
- Import and Export Management
- Global Trade Content

# Learning Options

From online self-study to live remote class to face-to-face training, from basic to advanced topics – we’ve got you covered!

We understand that the ONESOURCE corporate users have unique training needs and different learning styles. To meet the needs of our valued clients, the curriculum is designed with modern learning methodologies and brought to you in different delivery methods that can be taken as stand-alone courses or combined in blended learning programs for an optimal learning experience.

## TRAINING FORMATS

On-demand	Comprehensive content of instructor-led workshops in a self-paced format. CPE Included.
eLearning	Video-style and interactive eLearning modules covering basic, intermediate, and advanced topics, available 24/7 for self-study.
WebSeminar	1-hour live remote classes ranging from targeted areas of an application to new functionalities and features, conducted by expert trainers and strategically timed throughout the year for when it matters most. CPE included.
Workshop	University-style class with a small group or learners that gives you the opportunity to interact with other learners as you learn through scenario-based hands-on exercises. CPE included.
Dedicated	Group class exclusively delivered to your company either remotely or onsite, with hands-on exercises facilitated by an expert trainer. CPE included. Dedicated onsite courses can be scheduled with a minimum of 2 days. A combination of courses to equal 16 hours can be used.
Certification	Role-based certification exams that allow users to demonstrate a recognized level of competency within a ONESOURCE product and showcase their expertise in the marketplace with digital badges.

► FREE Courses identified with this tag are free – enroll now!



Thomson Reuters Tax & Accounting Corporates Training is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.NASBARegistry.org](http://www.NASBARegistry.org).

# Learning Options

Professional Services offer formal training courses.

We can offer these classes as dedicated sessions, or single seats in a specific workshop – but if you have a few people that would benefit from multiple courses, the Training Passport is a better option. Big picture, a Passport gives you unlimited access to all the live instructor-led courses and on-demand eLearning we offer, as well as certification opportunities for a particular product line.

## WHICH OFFERING IS RIGHT FOR ME?

Training Passport	Provides unlimited educational opportunities to get up and running. Future content is included in the subscription to keep up to date with functionality and deepen your knowledge. The Training Passport is an all-access subscription to all virtual Workshops, WebSeminars, eLearning, and User Certifications. Best overall value, and a great resource to drive operational efficiency.
Workshop Seat	Great if you have a 1-2 people looking to learn a specific title. Least expensive option for single-user/single-title.
Dedicated Training	Great if you want your team to take a specific training title at the same time.

## WHAT'S INCLUDED IN EACH OFFERING?

Offering	Workshops	WebSeminars	On-Demand	eLearning	Certifications	Dedicated (up to 10 attendees)
Training Passport	Multiple courses per product line	Full access per product line	Full access per product line	Full access per product line	Full access per product line	n/a
Dedicated Training	n/a	n/a	n/a	n/a	n/a	Single course
Workshop Seat	Single course	n/a	n/a	n/a	n/a	n/a

## PURCHASING OPTIONS

Interested in learning more? [Contact us.](#)

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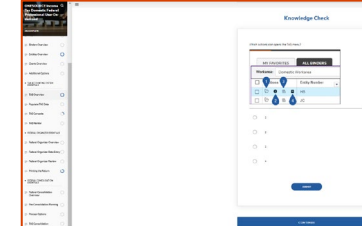
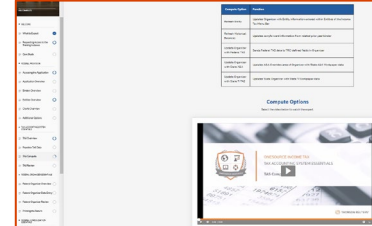
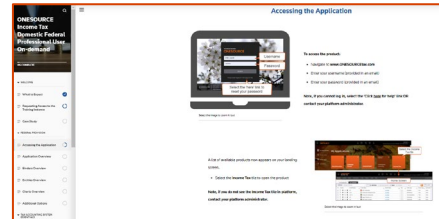
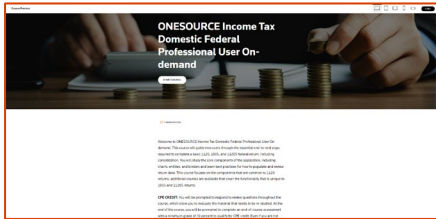
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# What do our courses look like?

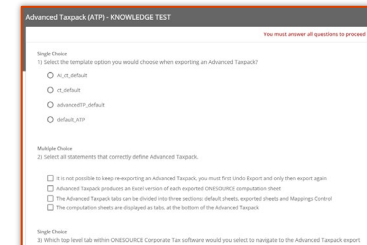
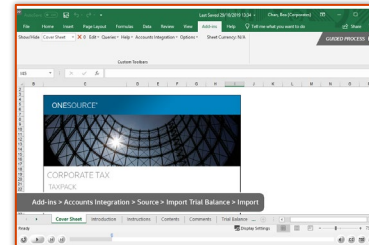
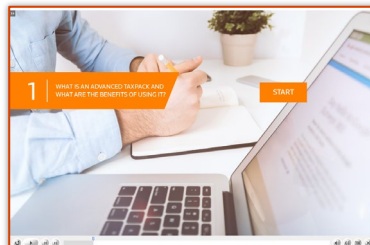
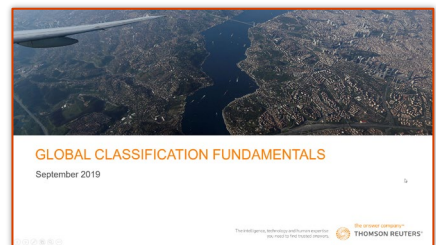
## ON-DEMAND TRAINING

Comprehensive content using text, video, graphics, interactivity, and knowledge checks to teach how to use ONESOURCE products. On-demand training covers much of the same content as the instructor-led training in a self-paced format.



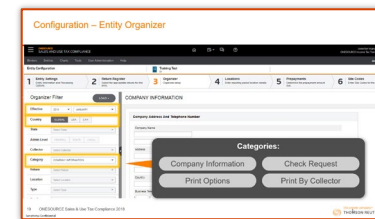
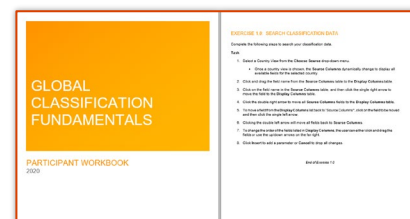
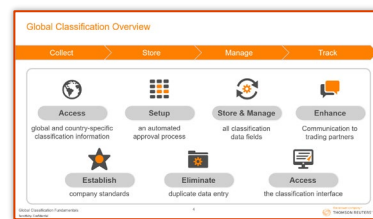
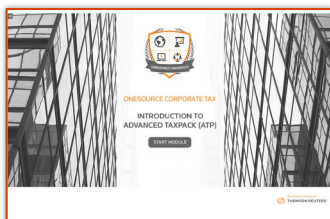
## INTERACTIVE ELEARNING

Video-style and interactive eLearning courses with product demonstrations, simulations, knowledge checks and other learning strategies for self-study.



## INSTRUCTOR-LED TRAINING

Remote and face-to-face training with expert instructors featuring personalized learning and hands-on exercises.



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# CERTIFIED USER PROGRAM

Welcome to the **ONESOURCE Certified User Program!** Are you a tax professional seeking a career-boosting differentiator within your company? Or maybe you just want to **validate your experience and knowledge** within the marketplace? You might be a team lead searching for potential candidates with proven ONESOURCE experience? Or a tax manager looking to **increase proficiencies** within your tax team? If one of those scenarios describes your needs, then you've come to the right place!



## TAX PROFESSIONALS

- Product Knowledge Validation
- Market Differentiator
- Digital Badges and Certificate



## TAX DEPARTMENTS

- Increase Organizational Proficiency
- Identify Qualified Candidates
- Build Strong Employee Career Paths

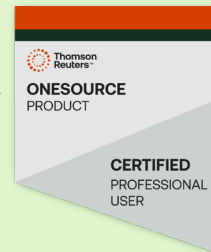


## PARTNERS

- Increase Services Marketplace Credibility
- Standardize Workforce Skills
- Identify Qualified Team Candidates

## LEVELS OF CERTIFICATION

1



### CERTIFIED PROFESSIONAL USER

User demonstrates a strong knowledge base and high skill level in the required functions/tasks typical of the product.

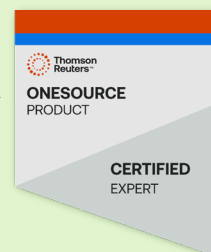
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### CERTIFIED PROFESSIONAL ADMIN

User demonstrates the required level of knowledge necessary to perform typical Administrator tasks.

3



### CERTIFIED EXPERT USER

User demonstrates full understanding of advanced features, using the product in complex situations and performing detailed administrative tasks.

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## WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
Platform Professional Administrator	8.5 hours	8 credits	<a href="#">Link</a>

Course Titles		
eLearning		
Platform	<ul style="list-style-type: none"> <li>• Introduction to OData ► <b>FREE</b></li> <li>• Platform &amp; Tools Introduction to ONESOURCE platform ► <b>FREE</b></li> <li>• Platform &amp; Tools Introduction to ONESOURCE Administration</li> <li>• Platform &amp; Tools Platform Homepage</li> </ul>	<ul style="list-style-type: none"> <li>• Platform &amp; Tools How to Create a OnePass Profile</li> <li>• Platform &amp; Tools How to Create a ONESOURCE Ticket</li> <li>• Platform &amp; Tools Entity Management</li> <li>• Platform &amp; Tools User Administration</li> </ul>

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## WORKSHOPS

### Course Title

### Duration

### Recommended CPE

### Course Agenda

The following courses are recommended for a comprehensive ONESOURCE Tax Provision new user training for US GAAP:

Tax Provision US Professional User	8.5 hours	8 credits	<a href="#">Link</a>
Tax Provision US Expert User	8.5 hours	8 credits	<a href="#">Link</a>
Tax Provision US Professional Administrator	8.5 hours	8 credits	<a href="#">Link</a>

The following courses are recommended for a comprehensive ONESOURCE Tax Provision new user training for non-US:

Tax Provision Global Professional User	8.5 hours	8 credits	<a href="#">Link</a>
Tax Provision Global Expert User	8.5 hours	8 credits	<a href="#">Link</a>
Tax Provision Global Professional Administrator	8.5 hours	8 credits	<a href="#">Link</a>

The following are stand-alone ONESOURCE Tax Provision courses:

Tax Provision Return and Provision Integration	4 hours	4 credits	<a href="#">Link</a>
Tax Provision Global Access Comprehensive	7 hours	6.5 credits	<a href="#">Link</a>
Tax Provision Year-End Master Class	7.5 hours	9.0 credits	<a href="#">Link</a>

### Add-ons

State Apportionment Comprehensive	8.5 hours	8 credits	<a href="#">Link</a>
Data Query Comprehensive	4 hours	4 credits	<a href="#">Link</a>
Data Import Add-In Comprehensive	4 hours	4 credits	<a href="#">Link</a>
Estimated Payments Comprehensive	4 hours	4 credits	<a href="#">Link</a>
General Ledger Manager Comprehensive	4 hours	4 credits	<a href="#">Link</a>
Workpapers Professional User for Tax Provision	4 hours	4 credits	<a href="#">Link</a>
Uncertain Tax Positions Comprehensive	7 hours	6 credits	<a href="#">Link</a>

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# ONESOURCE Tax Provision

Course Titles		
WebSeminars		
Tax Provision	<ul style="list-style-type: none"> <li>• Tax Provision Introduction to Tax Provision v2016</li> <li>• Tax Provision Federal Provision</li> <li>• Tax Provision Reporting</li> <li>• Tax Provision Deferred Tax Presentations</li> <li>• Tax Provision Effective Tax Functionality and Reporting</li> <li>• Tax Provision Tax Basis Balance Sheet</li> </ul>	<ul style="list-style-type: none"> <li>• Tax Provision Interim Reporting</li> <li>• Tax Provision Payables</li> <li>• Tax Provision State Provision</li> <li>• Tax Provision Return to Provision</li> <li>• Tax Provision Trial Balance Upload</li> <li>• Tax Provision Office Hours</li> </ul>

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## Course Titles

### eLearning

The courses marked with an asterisk (\*) are also included as a topic within an Interactive eLearning course; see next page for details.

Tax Provision	<ul style="list-style-type: none"> <li>• Introduction to ONESOURCE 2016 platform* ► FREE</li> <li>• Introduction to ONESOURCE Administration*</li> <li>• Introduction to ONESOURCE Tax Provision* ► FREE</li> <li>• Tax Provision Federal Provision Basics*</li> <li>• Tax Provision State Provision Basics*</li> <li>• Tax Provision State Provision Intermediate*</li> <li>• Tax Provision Data Management Basic Concepts* ► FREE</li> <li>• Tax Provision Reviewing Data Basics*</li> <li>• Tax Provision Deferred Balances Report*</li> <li>• Tax Provision Effective Tax Rate Functionality*</li> <li>• Tax Provision Tax Basis Balance Sheet*</li> <li>• Tax Provision Reporting Basics* ► FREE</li> <li>• Tax Provision Reporting Intermediate*</li> <li>• Tax Provision Reporting Advanced*</li> </ul>	<ul style="list-style-type: none"> <li>• Tax Provision Payable Basics*</li> <li>• Tax Provision Payables Advanced*</li> <li>• Tax Provision Payables Intermediate*</li> <li>• Tax Provision Spreadsheet Imports*</li> <li>• Tax Provision Administration Basics*</li> <li>• Tax Provision Manage System Settings*</li> <li>• Templates Tab</li> <li>• Tax Provision Reports – Class Datasets v2016</li> <li>• Tax Provision SAP to OTP Integration</li> <li>• Tax Provision Trending Topics - Return to Provision</li> <li>• Tax Provision Trending Topics - Payables</li> <li>• Tax Provision Trending Topics - Deferred Tax Presentations</li> <li>• Tax Provision Trabajar con ONESOURCE Income Tax</li> </ul>
Uncertain Tax Positions	<ul style="list-style-type: none"> <li>• Uncertain Tax Positions Reporting Overview v2016</li> <li>• Uncertain Tax Positions Other Functionality v2016</li> <li>• Uncertain Tax Positions Numbers Template v2016</li> <li>• Uncertain Tax Positions Main Contingency Menu v2016</li> <li>• Uncertain Tax Positions Intro to UTP v2016</li> <li>• Uncertain Tax Positions Data Transfer v2016</li> </ul>	<ul style="list-style-type: none"> <li>• Uncertain Tax Positions Categories and Class Templates v2016</li> <li>• Uncertain Tax Positions Admin Center Read Write v2016</li> <li>• Uncertain Tax Positions Admin Center Component Setup v2</li> <li>• Uncertain Tax Positions Admin Center Admin Rights v2016</li> <li>• Uncertain Tax Positions Action Menu v2016</li> </ul>
State Apportionment	<ul style="list-style-type: none"> <li>• Apportionment Accounts</li> <li>• Entities</li> <li>• Groups</li> </ul>	<ul style="list-style-type: none"> <li>• Jurisdictions</li> <li>• Nexus</li> <li>• Data Entry</li> </ul>
Data Import Add-in	<ul style="list-style-type: none"> <li>• Data Import Add-in Essentials</li> </ul>	
Workpapers	<ul style="list-style-type: none"> <li>• Introduction to Workpapers Next Generation</li> </ul>	
Data Query Reporting	<ul style="list-style-type: none"> <li>• Introduction to Data Query Reporting</li> </ul>	
SYNERGY 2021 recorded sessions	<ul style="list-style-type: none"> <li>• Modern ONESOURCE Tax Provision Overview</li> <li>• Provision Analytics enabled by ONESOURCE Tax Provision</li> <li>• Automation: NOLs, valuation allowance and AMT</li> </ul>	<ul style="list-style-type: none"> <li>• ONESOURCE Tax Provision: Analytics and Visualizations</li> <li>• Journal entry functionality and reporting</li> <li>• Flow through</li> </ul>

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# ONESOURCE Tax Provision

## Course Titles

### Interactive eLearning

The following eLearning courses include multiple videos as indicated, interactive elements, and knowledge checks:

Tax Provision (up to 6.5 CPE included)	<ul style="list-style-type: none"> <li>Tax Provision Product Overview (1.5 CPE)                             <ul style="list-style-type: none"> <li>Introduction to ONESOURCE platform</li> <li>Introduction to ONESOURCE Tax Provision</li> <li>Introduction to ONESOURCE Administration</li> </ul> </li> <li>Tax Provision Federal and State Provision (1 CPE)                             <ul style="list-style-type: none"> <li>Federal Provision Basics</li> <li>State Provision Basics</li> <li>State Provision Intermediate</li> <li>Data Management Basic Concepts</li> </ul> </li> <li>Tax Provision Customizing Reports (1 CPE)                             <ul style="list-style-type: none"> <li>Reviewing Data Basics</li> <li>Deferred Balances Report</li> <li>Effective Tax Rate Functionality &amp; Reporting Intermediate</li> <li>Tax Basis Balance Sheet</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Tax Provision Reporting Overview (1 CPE)                             <ul style="list-style-type: none"> <li>Reporting Basics</li> <li>Reporting Intermediate</li> <li>Reporting Advanced</li> </ul> </li> <li>Tax Provision Payables (1 CPE)                             <ul style="list-style-type: none"> <li>Payable Basics</li> <li>Payables Intermediate</li> <li>Payables Advanced</li> </ul> </li> <li>Tax Provision Administration (1 CPE)                             <ul style="list-style-type: none"> <li>Spreadsheet Imports</li> <li>Administration Basics</li> <li>Manage System Settings</li> </ul> </li> </ul>

### On-demand Training (Self-Study)

Tax Provision	<ul style="list-style-type: none"> <li>Tax Provision Professional Administrator (7 CPE)</li> <li>Tax Provision Professional User (6.5 CPE)</li> </ul>	<ul style="list-style-type: none"> <li>Tax Provision Expert User (7 CPE)</li> <li>Tax Provision Global Access Comprehensive (2.5 CPE)</li> </ul>
State Apportionment	<ul style="list-style-type: none"> <li>State Apportionment Comprehensive (5 CPE)</li> </ul>	
Workpapers	<ul style="list-style-type: none"> <li>Workpapers Professional User for Tax Provision (2 CPE)</li> </ul>	

### CERTIFICATION EXAMS

Product	Title	Duration
Tax Provision	Tax Provision Professional Administrator Certification Exam	2 hours
	Tax Provision Professional User Certification Exam	2 hours
	Tax Provision Expert User Certification Exam	2 hours
	Tax Provision Global Access Professional User Certification Exam	2 hours

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Course Title	Duration	Recommended CPE	Course Agenda
<b>Domestic</b>			
<i>The following courses are recommended for a comprehensive ONESOURCE Income Tax Domestic new user training:</i>			
Income Tax Domestic Federal Professional User	8.5 hours	8 credits	<a href="#">Link</a>
Income Tax Domestic State Professional User	8.5 hours	8 credits	<a href="#">Link</a>
Income Tax Domestic Professional Administrator	8.5 hours	8 credits	<a href="#">Link</a>
<i>The following courses should be paired with the Income Domestic Federal Professional User course for complete 1065 or 1120S new user training:</i>			
Income Tax Domestic Partnership Professional User	8.5 hours	8 credits	<a href="#">Link</a>
Income Tax Domestic S-Corporation Professional User	4.0 hours	4 credits	<a href="#">Link</a>
<i>The following courses are stand-alone product courses:</i>			
Income Tax Domestic Federal Expert User	8.5 hours	8 credits	<a href="#">Link</a>
Income Tax Domestic State Expert User	8.5 hours	8 credits	<a href="#">Link</a>
Income Tax Domestic Expert Administrator	8.5 hours	8 credits	<a href="#">Link</a>
Income Tax Domestic Insurance Professional User	8.5 hours	8 credits	<a href="#">Link</a>
Income Tax Domestic Conversion	8.5 hours	8 credits	<a href="#">Link</a>
Income Tax Year-End Master Class	8.0 hours	7.5 credits	<a href="#">Link</a>

\* Courses marked by an asterisk are not included in the ONESOURCE University Training Passport.

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## WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
<b>Express RS</b>			
<i>The following courses are recommended for a comprehensive Express RS 1120 new user training (schedule in the order and timing that fits your needs):</i>			
Income Tax Express RS Federal for 1120	8.5	8 credits	<a href="#">Link</a>
Income Tax Express RS State for 1120	8.5	8 credits	<a href="#">Link</a>
<i>The following courses are recommended for a comprehensive Express RS 1065 new user training (schedule in the order and timing that fits your needs):</i>			
Income Tax Express RS Federal for 1065	8.5	8 credits	<a href="#">Link</a>
Income Tax Express RS State for 1065	8.5	8 credits	<a href="#">Link</a>
<i>The following courses are recommended for a comprehensive Express RS 1120S new user training (schedule in the order and timing that fits your needs):</i>			
Income Tax Express RS Federal for 1120S	8.5	8 credits	<a href="#">Link</a>
Income Tax Express RS State for 1120S	8.5	8 credits	<a href="#">Link</a>
<b>International</b>			
<i>The following courses are recommended for a comprehensive ONESOURCE Income Tax International new user training:</i>			
Income Tax International Professional Administrator	8.5 hours	8 credits	<a href="#">Link</a>
Income Tax International Foreign Entity Professional User	8.5 hours	8 credits	<a href="#">Link</a>
Income Tax International Foreign Tax Credit Professional User	8.5 hours	8 credits	<a href="#">Link</a>

\* Courses marked by an asterisk are not included in the ONESOURCE University Training Passport.

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## WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
<b>Add-ons</b>			
State Apportionment Comprehensive	8.5 hours	8 credits	<a href="#">Link</a>
Tax Provision Return and Provision Integration	4 hours	4 credits	<a href="#">Link</a>
Data Query Comprehensive	4 hours	4 credits	<a href="#">Link</a>
Data Import Add-In Comprehensive	4 hours	4 credits	<a href="#">Link</a>
Estimated Payments Comprehensive	4 hours	4 credits	<a href="#">Link</a>
General Ledger Manager Comprehensive	4 hours	4 credits	<a href="#">Link</a>
Workpapers Professional User for Income Tax	4 hours	4 credits	<a href="#">Link</a>

\* Courses marked by an asterisk are not included in the ONESOURCE University Training Passport.

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# ONESOURCE Income Tax – US

Course Titles		
WebSeminars		
Domestic	<ul style="list-style-type: none"><li>Income Tax Annual Rollover</li><li>Income Tax Domestic Batch Process</li><li>Income Tax Maintaining Domestic Charts</li><li>Income Tax Maintaining State Charts</li></ul>	<ul style="list-style-type: none"><li>Income Tax State Consolidation Essentials</li><li>Income Tax State e-Filing</li><li>Income Tax State Organizer Essentials</li><li>Income Tax State Organizer Expert</li><li>Income Tax Office Hours</li></ul>
Express RS	<ul style="list-style-type: none"><li>Income Tax Express RS Trial Balance</li></ul>	<ul style="list-style-type: none"><li>Federal Office Hours</li></ul>
International	<ul style="list-style-type: none"><li>Income Tax International Charts</li><li>Income Tax International Preparing Form 5471</li><li>Income Tax International Preparing Form 8858</li><li>Income Tax International Preparing Form 8865</li></ul>	<ul style="list-style-type: none"><li>Income Tax International Preparing Form 1118</li><li>Income Tax International Preparing GILTI Forms</li><li>Income Tax International Office Hours</li></ul>
On-demand Training (Self-Study)		
Domestic	<ul style="list-style-type: none"><li>Income Tax Domestic Professional Administrator (5 CPE)</li><li>Income Tax Domestic Federal Professional User (4 CPE)</li></ul>	<ul style="list-style-type: none"><li>Income Tax Domestic State Professional User (4 CPE)</li></ul>
State Apportionment	<ul style="list-style-type: none"><li>State Apportionment Comprehensive (5 CPE)</li></ul>	

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# ONESOURCE Income Tax – US

Course Titles		
eLearning		
ONESOURCE Platform	<p><i>These courses correspond with the modules included in the Platform Professional Administrator workshop:</i></p> <ul style="list-style-type: none"> <li>Platform &amp; Tools Platform Homepage</li> <li>Platform &amp; Tools User Administration</li> <li>Platform &amp; Tools Entity Management</li> </ul>	<p><i>The following courses are stand-alone topics:</i></p> <ul style="list-style-type: none"> <li>Platform &amp; Tools Introduction to ONESOURCE platform ► <b>FREE</b></li> <li>Platform &amp; Tools Introduction to ONESOURCE Administration</li> <li>Platform &amp; Tools How to Create a OnePass Profile</li> <li>Platform &amp; Tools How to Create a ONESOURCE Ticket</li> <li>Introduction to OData ► <b>FREE</b></li> </ul>
Domestic	<p><i>These courses correspond with the modules included in the Income Tax Domestic Professional Administrator workshop:</i></p> <ul style="list-style-type: none"> <li>Income Tax Product Setup</li> <li>Income Tax Maintaining Domestic Charts</li> <li>Income Tax Maintaining State Charts</li> <li>Income Tax Batch Process Setup</li> </ul> <p><i>These courses correspond with the modules included in the Income Tax Domestic Federal Professional User workshop:</i></p> <ul style="list-style-type: none"> <li>Income Tax Product Overview</li> <li>Income Tax Tax Accounting System Essentials</li> <li>Income Tax Federal Organizer Essentials</li> <li>Income Tax Federal Consolidation Essentials</li> </ul> <p><i>These courses correspond with the modules included in the Income Tax Domestic State Professional User workshop:</i></p> <ul style="list-style-type: none"> <li>Income Tax State Processing Overview</li> <li>Income Tax State A&amp;A Workpapers Essentials</li> <li>Income Tax State Organizer Essentials</li> <li>Income Tax State Consolidation Essentials</li> </ul>	<p><i>These courses correspond with the modules included in the Income Tax Domestic Federal Expert User workshop:</i></p> <ul style="list-style-type: none"> <li>Income Tax Batch Process</li> <li>Income Tax Federal Organizer Extended</li> <li>Income Tax Federal eFiling</li> </ul> <p><i>The following courses are stand-alone topics:</i></p> <ul style="list-style-type: none"> <li>Federal Consolidations</li> <li>Income Tax Annual Rollover Process ► <b>FREE</b></li> <li>Income Tax Automating Adjustments</li> <li>Income Tax Domestic Overview</li> <li>Income Tax Federal Attachments</li> <li>Income Tax Introduction to Tax Regulatory Insights</li> <li>Income Tax Preparing Federal Estimates, Penalties and Extensions ► <b>FREE</b></li> <li>Income Tax Preparing FinCEN FBAR Form 114</li> <li>Income Tax Processing State Modifications</li> <li>Income Tax Enable, Populate, and Print State Estimates</li> </ul> <ul style="list-style-type: none"> <li>Income Tax Trending Topics – Populating Beginning Balances</li> <li>Income Tax Trending Topics – State TI Workpapers</li> </ul>
S-Corporation	<p><i>These courses correspond with the modules included in the Income Tax Domestic S-Corporation Professional User workshop:</i></p> <ul style="list-style-type: none"> <li>Income Tax Shareholder Information</li> <li>Income Tax S-Corporation Federal Processing</li> </ul>	<p><i>The following course is a stand-alone topic:</i></p> <ul style="list-style-type: none"> <li>Income Tax Activity Transfer for 1120S Returns</li> </ul>
Partnership	<p><i>These courses correspond with the modules included in the Income Tax Domestic Partnership Professional User workshop:</i></p> <ul style="list-style-type: none"> <li>Income Tax Partner Information</li> <li>Income Tax Partnership Federal Processing</li> <li>Income Tax Partnership State Processing</li> <li>Income Tax Partnership K-1 Transfer</li> </ul>	
International	<p><i>The following courses are stand-alone topics:</i></p> <ul style="list-style-type: none"> <li>Income Tax Preparing Forms 8991 8992, and 8993</li> <li>Income Tax Preparing Schedule I-1 Under TCJA</li> </ul>	<ul style="list-style-type: none"> <li>Income Tax Preparing Form 5471 Under TCA</li> </ul>
Insurance	<p><i>The following courses are stand-alone topics:</i></p> <ul style="list-style-type: none"> <li>Income Tax Preparing Property and Casualty Returns</li> <li>Income Tax Using TAS to Complete Insurance Returns</li> <li>Income Tax NOLs for Insurance Returns</li> </ul>	<ul style="list-style-type: none"> <li>Income Tax Insurance Consolidations Best Practices</li> <li>Income Tax Troubleshooting Federal Insurance Consolidations</li> <li>Income Tax Preparing State Insurance Consolidations</li> <li>Preparing Life Insurance Returns</li> </ul>

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# ONESOURCE Income Tax – US

Course Titles		
eLearning		
Express RS	<ul style="list-style-type: none"> <li>1120S Federal Organizer Express RS</li> </ul>	<ul style="list-style-type: none"> <li>Income Tax Working with ONESOURCE Income Tax and Express RS ► <b>FREE</b></li> </ul>
Integration	<ul style="list-style-type: none"> <li>Return and Provision Integration - Starting Returns</li> </ul>	
ONESOURCE Data Import Add-in	<ul style="list-style-type: none"> <li>Data Import Add-in Essentials</li> </ul>	
ONESOURCE Data Connection	<ul style="list-style-type: none"> <li>Income Tax Data Connection for Income Tax ► <b>FREE</b></li> </ul>	<ul style="list-style-type: none"> <li>Income Tax Data Connection for Express RS ► <b>FREE</b></li> </ul>
ONESOURCE State Apportionment	<ul style="list-style-type: none"> <li>Apportionment Accounts</li> <li>Entities</li> <li>Groups</li> </ul>	<ul style="list-style-type: none"> <li>Jurisdictions</li> <li>Nexus</li> <li>Data Entry</li> </ul>
K-1 Analyzer	<ul style="list-style-type: none"> <li>Income Tax K-1 Analyzer Training ► <b>FREE</b></li> </ul>	
SYNERGY 2020 recorded sessions	<ul style="list-style-type: none"> <li>ONESOURCE Income Tax International Tips and Tricks</li> <li>Foreign Tax Credit Entities and Form 1118 Processing</li> </ul>	<ul style="list-style-type: none"> <li>Tracking E&amp;P, Tax Pools and other advanced topics for Foreign Entity Processing</li> </ul>
SYNERGY 2021 recorded sessions	<ul style="list-style-type: none"> <li>Best practices for insurance returns</li> <li>How do I prepare the new Schedules K-2 and K-3?</li> <li>Using Data Query with ONESOURCE Income Tax</li> <li>The essentials of mixed-group returns</li> <li>Preparing state filings for insurance and mixed-group returns</li> <li>Using Alteryx with ONESOURCE State Apportionment</li> <li>Tracking earnings and profits, and tax pool information</li> <li>Processing GILTI through ONEOURCE Income Tax</li> <li>Customizing reports in ONESOURCE Data Query for international users</li> <li>Using ONESOURCE Income Tax International for preparing Form 8975</li> </ul>	<ul style="list-style-type: none"> <li>Reconciling transfer to Form 1118</li> <li>Advanced topics for foreign entity processing</li> <li>What's new for ONESOURCE Income Tax International</li> <li>Advanced topics for foreign tax credit entities and Form 1118 processing</li> <li>Frequently asked questions and best practices for ONESOURCE Income Tax International</li> <li>Amending returns and managing organizational changes in ONESOURCE Income Tax International</li> <li>Introduction to processing 5471s in ONESOURCE Income Tax International</li> </ul>

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# ONESOURCE Income Tax – US

## CERTIFICATION EXAMS

Product	Title	Duration
Income Tax Domestic	Domestic Professional Administrator Certification Exam	2 hours
	Domestic Federal Professional User Certification Exam	2 hours
	Domestic Federal Expert User Certification Exam	2 hours
	Domestic State Professional User Certification Exam	2 hours
	Domestic State Expert User Certification Exam	2 hours
	Domestic Partnership Professional User Certification Exam	2 hours
	Domestic S-Corporation Professional User Certification Exam	2 hours
	Domestic Insurance Professional User Certification Exam	2 hours
Express RS	Express RS Federal for 1120 Professional User Certification Exam	2 hours
	Express RS State for 1120 Professional User Certification Exam	2 hours
	Express RS Federal for 1065 Professional User Certification Exam	2 hours
	Express RS Federal for 1120-S Professional User Certification Exam	2 hours
Income Tax International	International Professional Administrator Exam	2 hours
	International Foreign Entity Professional User Certification Exam	2 hours
	International Foreign Tax Credit Professional User Certification Exam	2 hours
ADD-ONS		
State Apportionment	State Apportionment Professional User Certification Exam	2 hours
Data Query	Data Query Professional User Certification Exam	2 hours
Workpapers	Workpapers Professional User Certification Exam	2 hours

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## WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
The following course is based on the new generation product interface:			
DataFlow Comprehensive	17 hours	16.5 credits	<a href="#">Link</a>

## Course Titles

### eLearning

DataFlow Classic	<ul style="list-style-type: none"> <li>• Introduction to ONESOURCE DataFlow Classic ► <b>FREE</b></li> <li>• Introduction to FormsFlow Designer Classic ► <b>FREE</b></li> <li>• Introduction to DataFlow Extraction Classic ► <b>FREE</b></li> <li>• Preparing a FormsFlow Classic Workbook</li> <li>• Using FormsFlow Designer Classic Reports</li> <li>• Using DataFlow Classic</li> </ul>	<ul style="list-style-type: none"> <li>• DataFlow Classic Batch Administration</li> <li>• DataFlow Classic Menu Overview ► <b>FREE</b></li> <li>• Data Provider Classic</li> <li>• FormsFlow Designer Classic Reports &amp; Templates</li> <li>• DataFlow Classic Extraction – Linking Requests &amp; Rollforward</li> </ul>
Data Hub	<ul style="list-style-type: none"> <li>• DataFlow and Data Hub Integration ► <b>FREE</b></li> </ul>	
SYNERGY 2020 recorded sessions	<ul style="list-style-type: none"> <li>• Managing Your Data Collection Process Using ONESOURCE DataFlow</li> </ul>	<ul style="list-style-type: none"> <li>• The Next Generation of Data Collection in ONESOURCE DataFlow</li> </ul>
SYNERGY 2021 recorded sessions	<ul style="list-style-type: none"> <li>• Streamline your tax preparation process with the new ONESOURCE DataFlow</li> </ul>	

## CERTIFICATION EXAMS

Product	Title	Duration
DataFlow	DataFlow Professional User Certification Exam	2 hours
	DataFlow Professional Administrator Certification Exam	2 hours
DataFlow Classic	DataFlow Classic Professional Administrator Certification Exam	2 hours

## WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
WorkFlow Manager Comprehensive	17 hours	16.5 credits	<a href="#">Link</a>

## ADD-ONS

General Ledger Manager Comprehensive	4 hours	4 credits	<a href="#">Link</a>
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## Course Titles

## eLearning

ONESOURCE WorkFlow Manager	<ul style="list-style-type: none"> <li>Administration for ONESOURCE WorkFlow</li> <li>Introduction to ONESOURCE WorkFlow</li> <li>My Work</li> <li>ONESOURCE WorkFlow Manager Gadgets</li> </ul>	<ul style="list-style-type: none"> <li>Rules-Based WorkFlows</li> <li>WorkFlows and Tasks</li> <li>WorkFlows and WorkFlow Browser</li> </ul>
General Ledger Manager	<ul style="list-style-type: none"> <li>New General Ledger Manager</li> </ul>	

## CERTIFICATION EXAMS

Coming soon.

## WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
<i>The following course is based on the new generation product interface:</i>			
Calendar Demonstration	4 hours	4 credits	<a href="#">Link</a>

Course Titles		
On-demand Training		
Calendar	<ul style="list-style-type: none"> <li>Calendar Comprehensive</li> </ul>	
eLearning		
Calendar	<ul style="list-style-type: none"> <li>Introduction to ONESOURCE Calendar Next Generation ► <b>FREE</b></li> </ul>	<ul style="list-style-type: none"> <li>Administration for ONESOURCE Calendar ► <b>FREE</b></li> </ul>
Calendar Classic	<ul style="list-style-type: none"> <li>Introduction to Calendar Classic</li> <li>Scheduling and Managing Calendar Classic Events</li> <li>Adding Custom Records to Calendar Classic</li> <li>Generating Reports in Calendar Classic</li> <li>Importing for Calendar Classic</li> </ul>	<ul style="list-style-type: none"> <li>Retrieve and View Calendar Classic Data</li> <li>Tips and Tricks for Calendar Classic</li> <li>Roll Forward- Calendar Classic</li> <li>Administration for Calendar Classic</li> </ul>

## CERTIFICATION EXAMS

Product	Title	Duration
Calendar	Calendar Professional User Certification Exam	2 hours

## WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
<b>ONESOURCE Corporate Tax Legacy</b>			
Corporate Tax Legacy Introduction	7 hours	n/a	<a href="#">Link</a>
Corporate Tax Legacy Advanced	4.5 hours	n/a	<a href="#">Link</a>
Corporate Tax Legacy Tax Accounting IFRS/FRS101	7 hours	n/a	<a href="#">Link</a>
Corporate Tax Legacy Tax Accounting FRS102	7 hours	n/a	<a href="#">Link</a>
Corporate Tax Legacy Partnership	7 hours	n/a	<a href="#">Link</a>
<b>ONESOURCE Corporate Tax Cloud</b>			
Corporate Tax Cloud Introduction	7 hours	n/a	<a href="#">Link</a>
Corporate Tax Cloud Advanced	3.5 hours	n/a	<a href="#">Link</a>
Corporate Tax Cloud Tax Accounting IFRS/FRS101	7 hours	n/a	<a href="#">Link</a>
Corporate Tax Cloud Tax Accounting FRS102	7 hours	n/a	<a href="#">Link</a>
Corporate Tax Cloud Partnership	7 hours	n/a	<a href="#">Link</a>

## Course Titles

<b>eLearning</b>		
Corporate Tax Release 8	• Video Series ► <b>FREE</b>	
Corporate Tax	• Advanced Taxpack (ATP) ► <b>FREE</b>	• Introduction to Enterprise Edition ► <b>FREE</b>
Corporate Tax – Next Generation	• Next Generation Overview ► <b>FREE</b> • Account Mapping and Trial Balance Upload – Cloud ► <b>FREE</b>	• Introduction –Cloud (Videos) • Cloud (Next Generation) How To Videos
<b>WebSeminars</b>		
Corporate Tax – Next Generation	• Corporate Tax Cloud Office Hours	

## CERTIFICATION EXAM

Product	Title	Duration
Corporate Tax – Legacy	Corporate Tax Professional User Certification Exam	2 hours



## WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
<b>ONESOURCE Statutory Reporting Legacy</b>			
Statutory Reporting Legacy Basic User	7 hours	n/a	<a href="#">Link</a>
Statutory Reporting Legacy Super User	3.5 hours	n/a	<a href="#">Link</a>
<b>ONESOURCE Statutory Reporting Cloud</b>			
Statutory Reporting Cloud Basic User	7 hours	n/a	<a href="#">Link</a>
Statutory Reporting Cloud Super User	7 hours	n/a	<a href="#">Link</a>

Course Titles		
<b>On-demand Training</b>		
Statutory Reporting	<ul style="list-style-type: none"> <li>Statutory Reporting Cloud Basic User On-demand Training</li> </ul>	<ul style="list-style-type: none"> <li>Statutory Reporting Cloud Super User On-demand Training</li> </ul>
<b>eLearning</b>		
Statutory Reporting 2015	<ul style="list-style-type: none"> <li>Statutory Reporting Refresher Videos (2015 year-end) ► <b>FREE</b></li> </ul>	
Statutory Reporting 2020	<ul style="list-style-type: none"> <li>Statutory Reporting Cloud for Migration Users ► <b>FREE</b></li> <li>Statutory Reporting Cloud How To Videos</li> <li>Statutory Reporting Cloud Working with Reports</li> </ul>	<ul style="list-style-type: none"> <li>Statutory Reporting Cloud for Migration Administrators ► <b>FREE</b></li> </ul>
<b>WebSeminars</b>		
Statutory Reporting New UI	<ul style="list-style-type: none"> <li>Statutory Reporting Cloud Office Hours</li> </ul>	

## CERTIFICATION EXAM

Product	Title	Duration
Statutory Reporting - Cloud	Statutory Reporting Cloud Expert User Certification Exam	2 hours
	Statutory Reporting Cloud Professional User Certification Exam	2 hours

## WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
<b>ONESOURCE Determination Original Cloud</b>			
ONESOURCE Determination Original Cloud Hands-on Introduction	12 hours	13.5 credits	<a href="#">Link</a>
ONESOURCE Determination Original Cloud Hands-on Advanced	8 hours	9 credits	<a href="#">Link</a>

<b>ONESOURCE Determination Enterprise Cloud</b>			
ONESOURCE Determination Enterprise Cloud Hands-on Introduction	12 hours	12.5 credits	<a href="#">Link</a>
ONESOURCE Determination Enterprise Cloud Hands-on Advanced	8 hours	9 credits	<a href="#">Link</a>

<b>ONESOURCE Indirect Compliance – Sales &amp; Use (US and Canada)</b>			
ONESOURCE Indirect Compliance (Sales & Use) Hands-on Introduction	11 hours 15 min	13.5 credits	<a href="#">Link</a>
ONESOURCE Indirect Compliance (Sales & Use) Hands-on Advanced	8 hours	9 credits	<a href="#">Link</a>

<b>ONESOURCE Indirect Compliance – VAT</b>			
ONESOURCE Indirect Compliance - VAT Hands-on Introduction	4 hours	4 credits	<a href="#">Link</a>

<b>ERP Integration</b>			
ONESOURCE Indirect Tax Integration - Determination - SAP Global Next - New Users	4 hours	4 credits	<a href="#">Link</a>
ONESOURCE Indirect Tax Integration - Determination - SAP Global Next - Experienced Users	4 hours	4 credits	<a href="#">Link</a>
ONESOURCE Indirect Tax Integration - Determination - Oracle Fusion	4 hours	4 credits	<a href="#">Link</a>

## Course Titles

<b>WebSeminars</b>		
ONESOURCE Determination (Enterprise Cloud)	<ul style="list-style-type: none"> <li>Introduction to ONESOURCE Certificate Manager</li> <li>Office Hours</li> </ul>	<ul style="list-style-type: none"> <li>Comparing Original Cloud with Enterprise Cloud</li> </ul>
ERP Integration	<ul style="list-style-type: none"> <li>SAP Ariba Implementation Process</li> </ul>	

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Course Titles		
On-demand Training		
ONESOURCE Determination (Enterprise Cloud)	<ul style="list-style-type: none"> <li>Determination On-demand Training</li> </ul>	
ONESOURCE Indirect Compliance – Sales & Use Tax	<ul style="list-style-type: none"> <li>Compliance Sales &amp; Use Tax On-demand Training</li> </ul>	
ONESOURCE Indirect Compliance – VAT	<ul style="list-style-type: none"> <li>Compliance VAT On-demand Training</li> </ul>	
ONESOURCE Indirect Tax – Integration	<ul style="list-style-type: none"> <li>SAP Global Next On-demand Training</li> </ul>	
eLearning		
ONESOURCE Determination (Original Cloud)	<ul style="list-style-type: none"> <li>Solution Overview ► <b>FREE</b></li> <li>Managing Exempt Customers</li> <li>Introduction to Certificate Manager</li> <li>Comparing Original Cloud to Enterprise Cloud</li> <li>Introduction to Data File Integrator (DFI)</li> </ul>	<ul style="list-style-type: none"> <li>Transaction Extract Reporting</li> <li>Reporting ► <b>FREE</b></li> <li>Integration Principles ► <b>FREE</b></li> <li>Data Workflow Library (Alteryx) Overview</li> </ul>
ONESOURCE Determination (Enterprise Cloud)	<ul style="list-style-type: none"> <li>Product Overview                             <ul style="list-style-type: none"> <li>Indirect Tax Overview</li> <li>Model Scenario</li> <li>Managing Exempt Customers</li> <li>Tax Jurisdictions</li> <li>Product Mapping</li> <li>Conditional Mapping</li> <li>TransEditors</li> <li>Reports Analytics</li> </ul> </li> <li>Solution Overview ► <b>FREE</b></li> <li>Integration Principles ► <b>FREE</b></li> <li>Certificate Manager ► <b>FREE</b></li> <li>Standard Rate Lookup</li> <li>TransEditors</li> <li>Determination Anywhere</li> <li>SAP Business One Integration</li> <li>US Oil &amp; Gas</li> <li>Transition to Support</li> <li>How to Create a Support Ticket</li> <li>Determination Integration for SAP Global Next – Exercises</li> <li>Conditional Mapping</li> <li>Tax Jurisdictions</li> <li>Managing Exempt Customers</li> </ul>	<ul style="list-style-type: none"> <li>Introduction to Reports and Analytics ► <b>FREE</b></li> <li>Tire Fees ► <b>FREE</b></li> <li>Certificate Manager: Reviewing the Import Templates and User Interface</li> <li>Data File Integrator (DFI)</li> <li>Reports &amp; Analytics: Advanced Reporting</li> <li>Custom Rates and Fees</li> <li>ERP Code Mapping</li> <li>Vendor Charged Tax Verification</li> <li>Content Extract</li> <li>Determination for VAT: Intra-community Dispatch Sales</li> <li>Model Scenario for Common VAT Transactions</li> <li>Comparing Original Cloud with Enterprise Cloud</li> <li>Determination to Compliance Merge (D2C)</li> <li>Trending Topics – Tax Response Filters</li> <li>Brazil Implementation Best Practices</li> <li>How to Create a OnePass Account</li> <li>Data Workflow Library (Alteryx) Overview</li> <li>Indirect Tax Overview – Value Proposition</li> <li>Model Scenario</li> <li>ERP Code Mapping</li> <li>Product Mapping</li> </ul>
ONESOURCE Indirect Compliance – Sales & Use (US & Canada)	<ul style="list-style-type: none"> <li>Determination to Compliance (D2C) Merge</li> <li>Data Workflow Library (Alteryx) Overview</li> </ul>	<ul style="list-style-type: none"> <li>Electronic Filing Overview</li> </ul>
ONESOURCE Indirect Compliance – VAT	<ul style="list-style-type: none"> <li>Product Overview</li> <li>Exploring Navigation Features of the Platform ► <b>FREE</b></li> <li>Importing and Viewing Transaction Details</li> <li>Generating and Submitting Returns</li> </ul>	<ul style="list-style-type: none"> <li>Running and Managing Reports ► <b>FREE</b></li> <li>Using Workpapers</li> <li>Performing Administration Functions</li> <li>Data Workflow Library (Alteryx) Overview</li> </ul>
ONESOURCE Indirect Tax – Integration	<ul style="list-style-type: none"> <li>SAP Commerce Cloud</li> <li>SAP Business One</li> <li>ERP Code Mapping</li> <li>Determination Integration for SAP Global Next – Exercises</li> <li>Brazil Implementation Best Practices</li> </ul>	<ul style="list-style-type: none"> <li>SAP Ariba</li> <li>SAP Global Next Plants Abroad Overview</li> <li>Oracle Fusion</li> <li>D365 Finance and Operations</li> <li>Data Workflow Library (Alteryx) Overview</li> </ul>

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Course Titles																				
eLearning																				
SYNERGY recorded sessions	<ul style="list-style-type: none"> <li>• Around the World with Global Indirect Tax Research and Content</li> <li>• Tips and Tricks Fees, Other Charges, Tax Credits and Prepayments</li> <li>• Tips and Tricks Credits and Suspensions CA e-File, and Remote Sellers Support</li> <li>• Metrics for tax success: From basic reporting to actionable analytics</li> <li>• Metrics for tax success: From basic reporting, it's all about the data</li> <li>• Accelerating digital: Managing the global indirect tax lifecycle</li> <li>• The big shift: Impacts of real-time filing and e-invoicing</li> <li>• SAP and ONESOURCE: Better together!</li> <li>• What's new with ONESOURCE Indirect Compliance</li> <li>• What's new with ONESOURCE Determination, Tax Information Reporting, and Certificate Manager</li> <li>• Best practices for integrating ONESOURCE Determination with a procurement system</li> <li>• Integration of PeopleSoft 9.2 with ONESOURCE for Indirect Tax payables</li> <li>• Oracle and ONESOURCE: Elevate tax performance</li> <li>• Current and future states of integrations</li> <li>• Indirect Tax and Global Compliance</li> <li>• Introduction and Best Ways to Use ONESOURCE Indirect Compliance for VAT &amp; GST</li> <li>• ONESOURCE Indirect Compliance for VAT &amp; GST: New Digital Tax Reporting and Market Trends</li> <li>• New SAP US Global Tax Service Integrations for SAP S/4HANA Any Premise and SAP S/4HANA Cloud</li> <li>• What's new with the ONESOURCE Determination Enterprise Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• Enhancements on Oracle ERP Cloud (Fusion) Integration</li> <li>• Introduction to Indirect Tax Next Generation Reporting and Analytics</li> <li>• What's New with ONESOURCE Indirect Compliance for VAT &amp; GST</li> <li>• Leveraging RPA, intelligent automation and analytics as part of your tax engine implementation</li> <li>• Leveraging Alteryx and data analytics tools to optimize your implementation and post go-live ONESOURCE maintenance</li> <li>• ONESOURCE Sales and Use Tax Compliance tips and tricks on reporting and reconciliation</li> <li>• EU One-Stop Shop (OSS) and e-commerce regulations</li> <li>• ONESOURCE Sales and Use Tax Compliance work area actions and batch processing</li> <li>• Preparing for a cloud ERP migration</li> <li>• ONESOURCE Sales and Use Tax Compliance prepayments module tips and tricks</li> <li>• Tax Traps for the Unwary: Staying ahead of Changes in State and Local Tax</li> <li>• Global indirect tax determination: Regulatory changes that impact your business</li> <li>• What's New with ONESOURCE Sales &amp; Use Tax Compliance</li> <li>• What's New with ONESOURCE Determination – Original Shared and Original Dedicated Cloud</li> </ul>																		
	<table> <tr> <td rowspan="2">ONESOURCE Determination (Original Cloud)</td><td>Professional User Exam</td><td>2 hours</td></tr> <tr> <td>Expert User Exam</td><td>2 hours</td></tr> <tr> <td>ONESOURCE Determination (Enterprise Cloud)</td><td>Professional User Exam</td><td>2 hours</td></tr> <tr> <td>ONESOURCE Indirect Compliance – VAT</td><td>Professional User Exam</td><td>2 hours</td></tr> <tr> <td>ERP Integration</td><td>Integration for SAP Global Next – Professional User Exam</td><td>2 hours</td></tr> <tr> <td rowspan="2">ONESOURCE Indirect Compliance - S&amp;U Tax</td><td>Professional User Exam</td><td>2 hours</td></tr> <tr> <td>Expert User Exam</td><td>2 hours</td></tr> </table>	ONESOURCE Determination (Original Cloud)	Professional User Exam	2 hours	Expert User Exam	2 hours	ONESOURCE Determination (Enterprise Cloud)	Professional User Exam	2 hours	ONESOURCE Indirect Compliance – VAT	Professional User Exam	2 hours	ERP Integration	Integration for SAP Global Next – Professional User Exam	2 hours	ONESOURCE Indirect Compliance - S&U Tax	Professional User Exam	2 hours	Expert User Exam	2 hours
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## WORKSHOPS

Course Title	Duration	Recommended CPE	Course Agenda
Denied Party Screening (DPS) Fundamentals	3 hours	n/a	<a href="#">Link</a>
Global Classification (GC) Fundamentals	4 hours	n/a	<a href="#">Link</a>
Global Classification (GC) Advanced	3 hours	n/a	<a href="#">Link</a>
Foreign Trade Zones (FTZ) Basic Distribution Processing	4 hours	n/a	<a href="#">Link</a>
Foreign Trade Zones (FTZ) Reports	4 hours	n/a	<a href="#">Link</a>
Foreign Trade Zones (FTZ) Validations and Data Correction Tools	3 hours	n/a	<a href="#">Link</a>
Content Harmonized Schedule (HS) Fundamentals	3 hours	n/a	<a href="#">Link</a>

## Course Titles

### Web Seminars

Denied Party Screening (DPS)	• Office Hours	
Global Classification (GC)	• Office Hours	
Global Trade Content	• Office Hours	
Foreign Trade Zones (FTZ)	• Office Hours	

### On-demand Training

Denied Party Screening (DPS)	• Denied Party Screening (DPS) On-demand Training
Global Classification (GC)	• Global Classification (GC) On-demand Training
Global Trade Content	• Content Harmonized Schedule (HS) On-demand Training
Foreign Trade Zones (FTZ)	• QPWP On-demand Training



Course Titles		
eLearning		
Foreign Trade Zones	<ul style="list-style-type: none"> <li>Foreign Trade Zones (FTZ) Overview</li> <li>Introduction to FTZ Management</li> <li>Foreign Trade Zones (FTZ) Reporting Tools Best Practices</li> </ul>	<ul style="list-style-type: none"> <li>Foreign Trade Zones (FTZ) Zone to Zone Transfers</li> <li>Foreign Trade Zones (FTZ) – Manufacturing Introduction</li> </ul>
Denied Party Screening	<ul style="list-style-type: none"> <li>Introduction to Denied Party Screening</li> </ul>	<ul style="list-style-type: none"> <li>Denied Party Screening (DPS) The Benefits of Utilizing Specialty DPS Lists</li> </ul>
Global Classification	<ul style="list-style-type: none"> <li>Introduction to Global Classification</li> <li>Smart ECN</li> </ul>	<ul style="list-style-type: none"> <li>Global Classification (GC) New User Experience</li> </ul>
Export Management	<ul style="list-style-type: none"> <li>Introduction to Export Management</li> </ul>	
Import Management	<ul style="list-style-type: none"> <li>Introduction to Import Management</li> </ul>	
Entry Verification	<ul style="list-style-type: none"> <li>Introduction to Entry Verification</li> </ul>	
Free Trade Agreements	<ul style="list-style-type: none"> <li>Introduction to FTA</li> <li>FTA Supplier Response</li> </ul>	<ul style="list-style-type: none"> <li>FTA Supplier Solicitation</li> </ul>
Government Connectivity	<ul style="list-style-type: none"> <li>Introduction to Government Connectivity, US AES</li> </ul>	<ul style="list-style-type: none"> <li>Introduction to Government Connectivity, US ABI</li> </ul>
Global Trade Visibility	<ul style="list-style-type: none"> <li>Introduction to Global Trade Visibility</li> </ul>	
Supply Chain Compliance	<ul style="list-style-type: none"> <li>Introduction to Supply Chain Compliance</li> </ul>	
Trade Lane Analyzer	<ul style="list-style-type: none"> <li>Introduction to Trade Lane Analyzer</li> </ul>	
ERP Integration	<ul style="list-style-type: none"> <li>Introduction to SAP Connectors</li> <li>SAP Connector</li> </ul>	
Global Trade Content	<ul style="list-style-type: none"> <li>Introduction to Global Trade Content</li> </ul>	
IMMEX	<ul style="list-style-type: none"> <li>IMMEX Goods Transfer Constancy</li> </ul>	
General	<ul style="list-style-type: none"> <li>Report Builder</li> </ul>	
SYNERGY recorded sessions	<ul style="list-style-type: none"> <li>Best Practices Using Import and Export Management and Verification</li> <li>New Connectors in GTM</li> <li>Using ONESOURCE Global Trade Content to keep up with regulatory changes</li> <li>Keeping up with Regulatory Changes Using Global Trade Content</li> <li>Mastering your zone: Tips and tricks for ONESOURCE FTZ software</li> <li>Classification corner: New tools, new technologies with ONESOURCE Global Classification</li> <li>GTM Health Checks and Platform Tools</li> <li>Tips to ensure a smooth ONESOURCE Global Trade implementation</li> </ul>	<ul style="list-style-type: none"> <li>Auto solicitation and savings through ONESOURCE FTA Management software</li> <li>Best practices: Training makes for better compliance</li> <li>Trade modernization: Does CBP's 21st Century Customs Framework meet the challenges?</li> <li>How to determine if an FTA is right for you</li> <li>Mitigating risk in your supply chain: Forced labor and China trade policies</li> <li>What is New in Screening and Clear?</li> <li>Global Classification and Smart HS Update</li> <li>Exploring GTM Platform Tools and Zone Health Checks</li> <li>Best practices to stay compliant using ONESOURCE Export Management and AES for GTM</li> </ul>

# ONESOURCE Global Trade

## CERTIFICATION EXAMS

Product	Title	Duration
Foreign Trade Zones	Professional User Certification Exam	2 hours
Denied Party Screening	Professional User Certification Exam	2 hours
Global Classification	Professional User Certification Exam	2 hours
Content Harmonized Schedule	Professional User Certification Exam	2 hours

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