

Next Generation ONESOURCE Corporate Tax

Setting up users



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1 Introduction

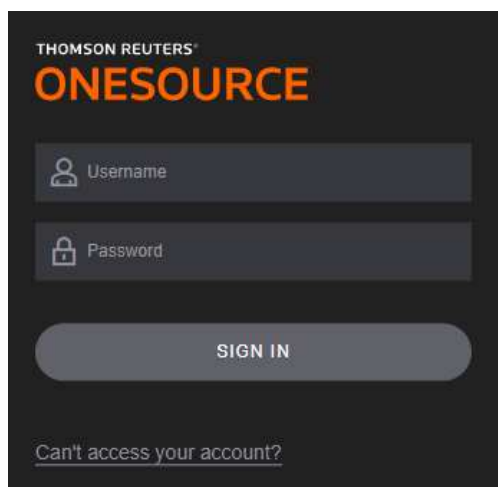
The purpose of this document is to provide a brief overview of setting up users in ONESOURCE Administration. For guidance on setting up Groups or other areas of ONESOURCE Administration (such as Client Manager) please refer to the E-learning modules on ONESOURCE University.

2 Accessing ONESOURCE Administration

As a reminder, to access in order to access any ONESOURCE applications, you need to access the ONESOURCE Platform. The URL for this is:

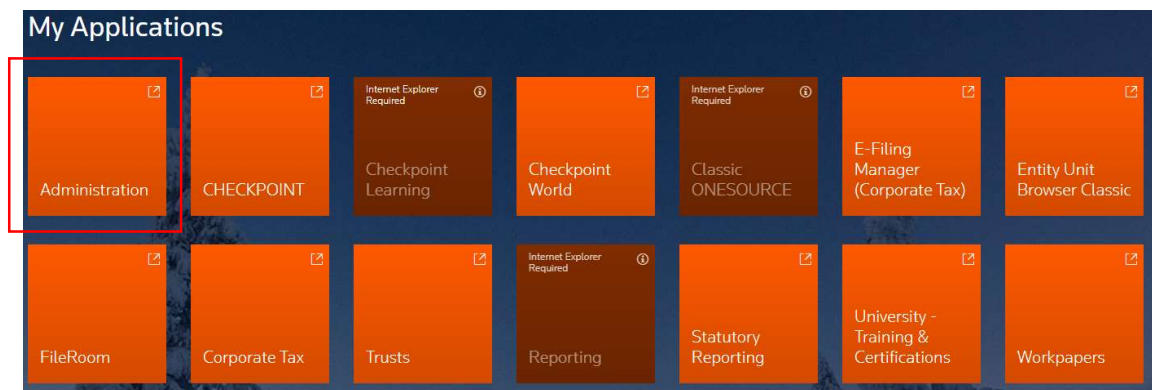
<https://emea1.onesourcetax.com/platform/home>

This will take you to the Login screen



Once you have logged in you will be taken to your ONESOURCE homepage which will display all the ONESOURCE applications which you are able to access. Each application is displayed as an Orange tile.

Once you have logged into the ONESOURCE Platform click on the Administration Tile, which will take you into ONESOURCE Administration and default to the Users Tab.



3 Add or edit a user

The first step is to add a new user, to do this, click on the Add user button.



To edit an existing user, the click on the pencil icon in the action's column.



Whether you are adding or editing a user, you will then be guided through a wizard to:

- Add user details
- Set user permissions
- Set product permissions

This is shown by the screenshot of the user setup workflow which contains the 3 chevrons indicated in the screenshot below.



4 Set user details

The next step is to populate the requested user information as per the screenshot below one done, on the left hand corner of the screen click next.

A screenshot of the 'Add New User' form in the Thomson Reuters Administration interface. The form is part of a three-step wizard. Step 1, 'Details', is active and contains the following fields: 'Universal ID*' (with a 'Rules' link), 'Full Name*' (with a 'Rules' link), 'Email Address*', 'User Type' (a dropdown menu currently showing 'Regular User'), 'Single Sign On', 'Password*' (with a 'Rules' link'), and 'Confirm Password*'. The 'Add' button from the previous screen is visible in the top left corner of the form area.

5 Set user permissions

This will bring you to a screen where you can set the specific user permissions for each application you have access to on the ONESOURCE Platform

- Step 1 – click on the “Corporate Tax” on the left-hand side of the screen. Once the permissions have been set, the green dot next to Corporate Tax will be visible, to indicate that user permissions have been set.
- Step 2 – select the required user role. These include, System Administrator, Client Administrator and End User, please see the appendix to this document for an explanation of the user role and the differences in default permissions.
- Step 3 – you can uncheck or re check specific permissions to tailor the permissions available for the user.
- Step 4 – you can tailor access of individual users to entities or datasets.

Once complete, click next at the bottom left-hand corner of the screen.

1 Details Provide user information

2 Permissions Set application specific permissions for this user

3 Products Select which products will be available to this user

Administration

Corporate Tax

E-Filing Manager

E-Filing Manager (Corporate Tax)

Indirect Tax Compliance

Corporate Tax

Modules

User Role: End User

Set Access To: Modules

Access

Calculations

Attachments

Change from a non-editable status

Change from an editable status

Delete Calculation

Disable workbook autosave

Effiler Wizard - File

Effiler wizard - File (Queues in Effiler)

Effiler Wizard - Save to XML

Effiler Wizard - Validate

Exports

6 Set product permissions

This will now bring you to a screen which product tiles will be available for the user. Check each product which you would like the user to be able to access, or alternatively check all products. Once this step is complete, click done and the user wizard will close.

1 Details Provide user information

2 Permissions Set application specific permissions for this user

3 Products Select which products will be available to this user

Product Assignments

Select which products will be able to be seen and opened in ONESOURCE.

All Products (select all)

ONESOURCE CHECKPOINT

Corporate Finance & Accounting

Estate Planning

ONESOURCE GLOBAL TAX & REPORTING

E-Filing Manager (Corporate Tax)

E-Filing Manager (Indirect Tax)

ONESOURCE Corporate Tax

7 Client Manager enabled databases

If you are working in a client manger enabled database (typically relevant for accounting firms) then the process you will go through will be slightly different. The workflow now includes 4 Chevrons, with the extra one being “Clients” which becomes step 2 of the process



7.1 Allocating clients

On the screenshot below, is the list of clients which have been set up in the database (Setting up the clients is beyond the scope of this document, please see further training on ONESOURCE University). These clients are in the left-hand pane. The clients which the user has access to are in the right-hand pane. To transfer clients to the user, select the clients in the left-hand pane to be transferred and then click on the button which says Transfer (in the left-hand pane, which will be highlighted).

To remove clients, select the clients in the right-hand pane, and then click the button which says transfer (in the right-hand pane, which will be highlighted).

Once this is complete, click next on the bottom left-hand corner.

Available Clients
3 of 60 Checked

CLIENT NUMBER	CLIENT NAME
☒ 001	after_patch1
☒ 002	after_patch2
☒ 003	after_patch3
☐ 1	API
☐ 001	before_patch
☐ 001	before_patch1

Transfer >

Selected Clients

CLIENT NUMBER	CLIENT NAME	SOURCE
☐ 2230	2230 client	Individual
☐ 2266	2266 client	Individual

< Transfer

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PREVIOUS NEXT >

7.2 Setting user permissions

Where client manager is enabled the process for setting user permissions is slightly different, as the user permissions are assigned per client. As per section 3, select Corporate Tax. You will then need to select which client to set the permissions for. Once the client is selected follow the steps in section 3 above to complete the process.

Once this is complete, click next on the bottom left-hand corner, and complete the final chevron in the user setup process.

The screenshot displays the 'Edit User / Demo_User' interface, specifically the 'Permissions' step (Step 3 of 4). The interface is divided into several sections:

- Navigation Bar:** Shows four steps: 1. Details (Provide user information), 2. Clients (Select the clients to provide product level access), 3. Permissions (Set application specific permissions for this user - currently active), and 4. Products (Select which products will be available to this user).
- Left Sidebar:** Contains a list of products: Administration, Platform, API Administration (highlighted with a red box), E-Filing Manager (Corporate Tax), Statutory Reporting, and Workpapers. Under API Administration, 'Corporate Tax' is selected and highlighted with a red box.
- Clients Section:** Includes a search bar and checkboxes for 'Assigned to user', 'Associated with product', 'Clients with permissions', and 'Clients with no permissions'. Below these, a list of clients is shown: '2230', '2230 client' (highlighted with a red box), '2266', and '2266 client'. Navigation controls and 'Page 1 of 1' are at the bottom of this section.
- Corporate Tax Modules:** A table listing various modules and their access status. The 'User Role' is set to 'End User' and 'Set Access To' is set to 'Modules'.

Modules	Access
Calculations	☒
Attachments	☒
Change from a non-editable status	☒
Change from an editable status	☒
Delete Calculation	☒
Disable workbook autosave	☒
Etfler Wizard - File	☒
Etfler wizard - File (Queues in Etfler)	☒
Etfler Wizard - Save to XML	☒
Etfler Wizard - Validate	☒
Exports	☒

8 User roles

OCT contains the following user roles:

- System/Client Administrator – This user has access to administration functions in OCT together with the standard capability of the End User..
- End User – This user has no access to the administration functionality, and only limited access to configuration functionality. This is the user role which you should allocate to most users.

The table below provides a list of all functions per the relevant menu for each user role.

Menus	System Admin	Client Admin	End User
More menu (on calculation management screen if you click on the more button next to each entity)	• Insert sheets • Change Sources • E-Filing • Save To Excel • Change Status • Copy Calculations • Print • Force Upgrade • Upgrade • Upgrade to • Force Refresh • Transforms	• Insert sheets • Change Sources • E-Filing • Save To Excel • Change Status • Copy Calculations • Print • Upgrade	• Insert sheets • Change Sources • E-Filing • Save To Excel • Change Status • Copy Calculations • Print • Upgrade
Administration menu	• Calculation Statuses • Dataset Purpose • Exceptions • Open Calculations • Settings • Templates • Template cache • Users • Template Settings • Validate Calculations	• Calculation Statuses • Dataset Purpose • Exceptions • Open Calculations • Settings • Template cache • Validate Calculations	N/A
Configuration menu	• Chart of accounts • Entity Manager • Import Specifications • Mappings • Line Items • Print Styles	• Chart of accounts • Entity Manager • Import Specifications • Mappings • Line Items • Print Styles	• Chart of accounts • Entity Manager • Import Specifications • Mappings • Line Items
Settings menu (in calculation)	• Search • Sort • Settings • History • PDU Details • Compare	• Search • Sort • Settings • History • PDU Details • Compare	• Search • Sort • Settings • History • PDU Details • Compare

	• Sheet Settings • Import Data from External File • Import Overrides • Reset to Template Cell • View All Template Overrides • Client Template • Properties • Dependent References	• Sheet Settings • Import Data from External File • Reset to Template Cell • View All Template Overrides • Client Template • Properties • Dependent References	• Sheet Settings • Import Data from External File • Reset to Template Cell • View All Template Overrides • Properties • Dependent References
Save menu (in calculation)	• Save • Save Copy • Save as Latest • Save Version • Save to Excel • Save to File • Load from File • Export File • Import File	• Save • Save Copy • Save Version • Save to Excel • Save to File • Load from File • Export File • Import File	• Save • Save Copy • Save Version • Save to Excel • Save to File • Load from File