Next Generation ONESOURCE Corporate Tax

Setting up users

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1 Introduction

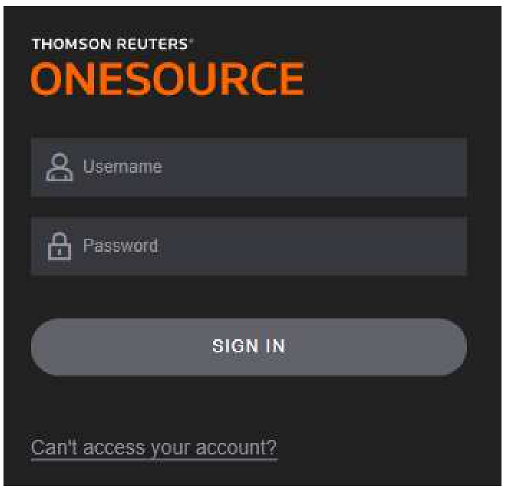
The purpose of this document is to provide a brief overview of setting up users in ONESOURCE Administration. For guidance on setting up Groups or other areas of ONESOURCE Administration (such as Client Manager) please refer to the E-learning modules on ONESOURCE University.

2 Accessing ONESOURCE Administration

As a reminder, to access inorder 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

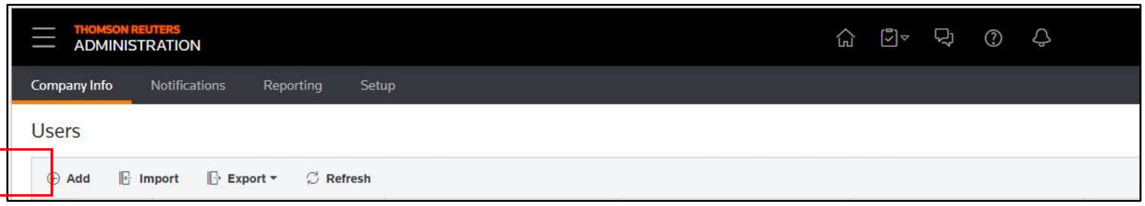


Once you have logged in you will be taken to your ONESOURCE homepage which will display all the ONESOURCE applications which you are able to acces. Each application is displayed as an Orange tile.

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.

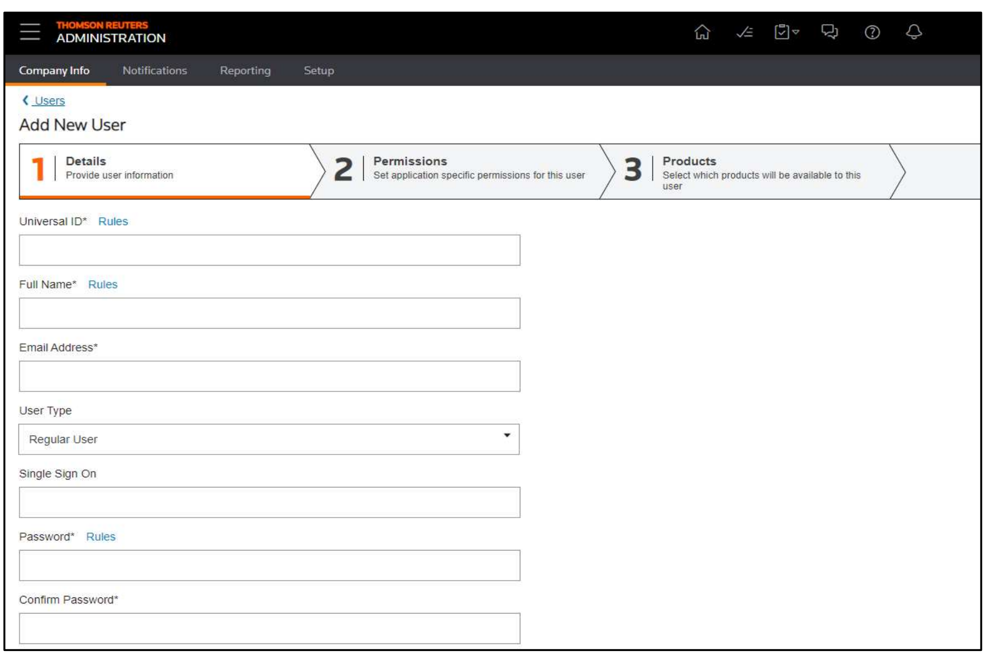
Whether you are adding or editing a user, you will then be guided through a wizard to:

- 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.

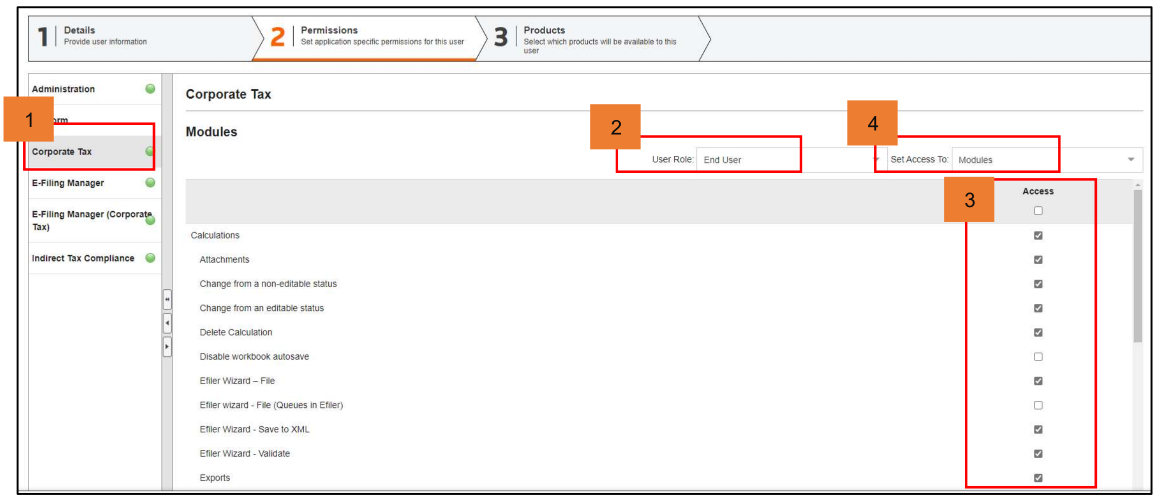


5 Set user permissions

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

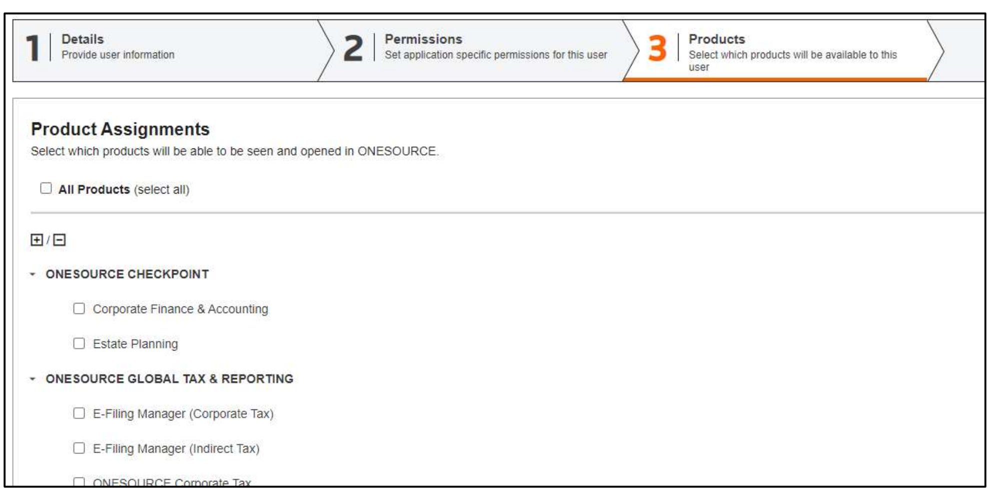
- Step 1 – click on the "Corporate Tax" on the left-hand side of the screen. Once the permissions have been set, the green dot next to Corporate Tax will be visible, to indicate that user permissions have been set.
- Step 2 – select the required user role. These include, System Administrator, Client 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.



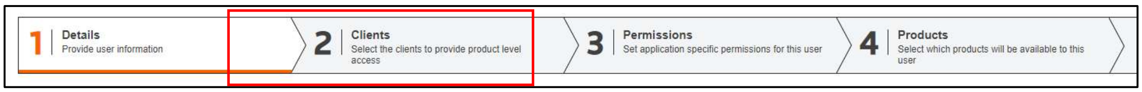
6 Set product permissions

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.



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

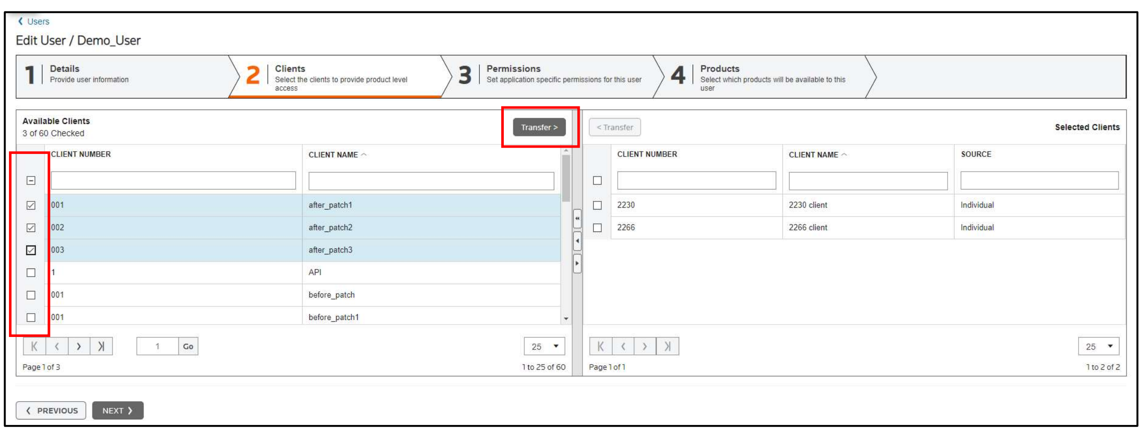


7.1 Allocating clients

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).

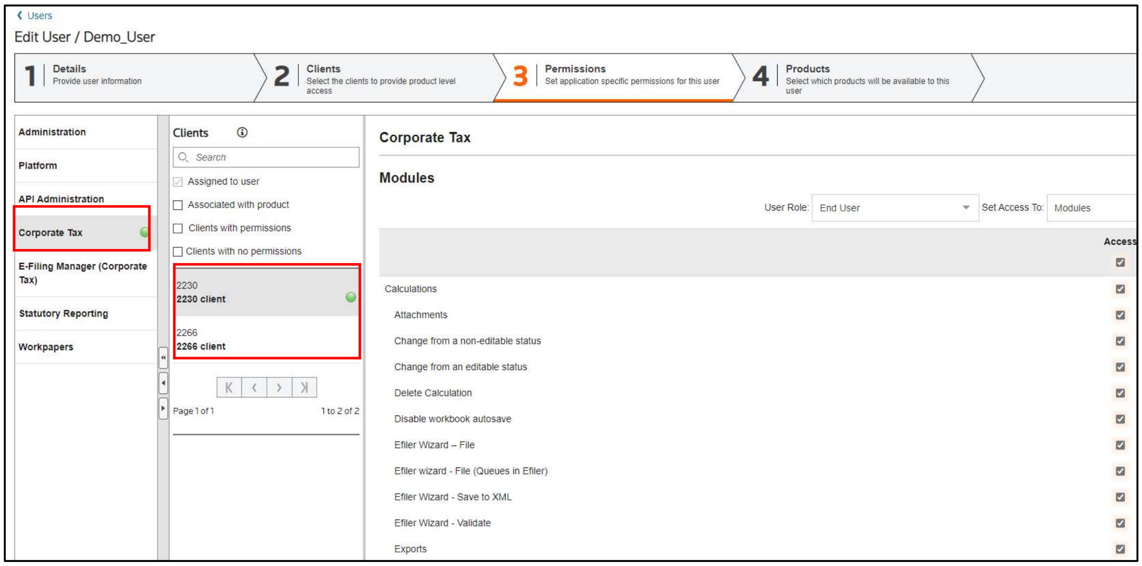
Once this is complete, click next on the bottom left-hand corner.



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.



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