

There are many challenges with tax work, starting with the ability to get the proper data. As workloads increase and demands rise, it is essential that tax professionals have reliable methods for collecting, consolidating and reviewing data. Corptax offers a range of solutions to make this process faster, more efficient and less prone to errors and risk.

Corptax Data Exchange

Automated data import with minimal manual involvement after setup

A standard ETL tool (Extract, Transform and Load), Corptax® Data Exchange automates the process of loading data into Corptax directly from source systems. This tool allows for application of business rules and mappings, meaning Corptax can pull information in at the account or entity level required to do compliance, provision and planning.

In other words, if the source system data isn't in the right format – let's say it's at the business unit or cost center level – Corptax allows the end user to "consolidate" into the necessary detail. This is also true for descriptive type data.

Corptax Office

Data collection and reporting with two-way data access between Corptax and Excel

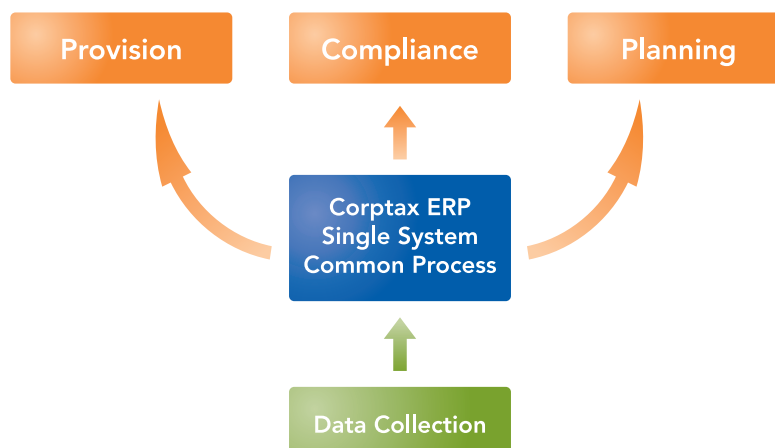
Corptax® Office is a choice solution for companies who want to continue to use proven Excel workbook solutions. Corptax Office is an Excel add-in that allows for the bi-directional flow of data between Corptax and Excel with a simple submission button.

This tool removes the need for creating export files from Excel and importing these files into the tax system. Built-in validation and diagnostics allow for immediate verification that data from Excel was properly moved to the tax system. Corptax Office enables proven processes to stay in place with no learning curve. Additionally, the security rights and administration set up in Corptax accrue to Corptax Office, so there is no need for additional security measures.

Corptax Data Collect Workpapers

Comprehensive data collection workpapers with built-in process workflow

Corptax® Data Collect Workpapers is a secure, Web-based tool that allows staff, clients and even other third-party resources to use standard workpapers to collect, analyze and review data. No additional software needs to be installed on users' local workstations and full security rights can be established for all users. This tool offers review of data in real time and allows for multiple users to interact with the data at the same time without any need for importing or exporting.



Corptax Data Exchange	Corptax Office	Corptax Data Collect Workpapers
<ul style="list-style-type: none"> ✓ Process large amounts of data from one or more source systems 	<ul style="list-style-type: none"> ✓ Flexibility with familiar look and feel of Excel 	<ul style="list-style-type: none"> ✓ Standardized workpapers for consistent formats and more control, includes document attachment capabilities
<ul style="list-style-type: none"> ✓ Event-driven processing automatically identifies files to be processed 	<ul style="list-style-type: none"> ✓ Works with existing data collection workbooks, other Excel add-in packages such as Hyperion's SmartView or for any one-off data collection need 	<ul style="list-style-type: none"> ✓ Web-based data collection for global access in real time
<ul style="list-style-type: none"> ✓ Process status and email notification upon completion of process 	<ul style="list-style-type: none"> ✓ For data submission, multiple fields can be mapped or a single field calculated and linked directly with Corptax 	<ul style="list-style-type: none"> ✓ Workflow management to assign and track process
<ul style="list-style-type: none"> ✓ Summary and detailed record reports available for data imported as well as reject reports 	<ul style="list-style-type: none"> ✓ Simple extraction of provision and tax data for reporting, planning and analytics in Excel 	<ul style="list-style-type: none"> ✓ Package and schedule status tracking and reporting, including on-workpaper validation against benchmarks
<ul style="list-style-type: none"> ✓ Conversion mapping allows customized accounts, entity codes, and jurisdiction codes to the Corptax equivalents for easier import and review 	<ul style="list-style-type: none"> ✓ Works in conjunction with Corptax WorkSpace for additional controls and document tracking and storing 	<ul style="list-style-type: none"> ✓ User-defined tax packaged tailored to your needs, including pre-return collected data review and approval and audit trails
<ul style="list-style-type: none"> ✓ Examples for use: General Ledger data, apportionment, fixed assets, etc. 	<ul style="list-style-type: none"> ✓ Examples for use: apportionment schedules, M1 adjustments 	<ul style="list-style-type: none"> ✓ Examples for use: international data from remote sites, tax adjustments