



Category	Type	Title	Description	Date	Start Time	End Time
Checkpoint	Product Training	CP100 - Make the Most of Your Tax Research with AI Powered Checkpoint Edge	This session provides an overview of different search capabilities using the AI Powered Checkpoint EDGE.	11/6	10:45 AM	11:40 AM
Checkpoint	Product Training	CP110 - The Emerging Tax and Financial Reporting Landscape for Alternative Energy & ESG Investments on Checkpoint	This session provides an overview of the Emerging Tax and Financial Reporting Landscape for Alternative Energy & ESG Investments searches/findings on Checkpoint.	11/6	1:00 PM	1:55 PM
Checkpoint	Product Training	CP120 - Optimizing Credits and Incentives: Identify and Take Advantage of New Incentives Using Checkpoint	In this class customers will identify New Incentives and Optimizing Credits in Checkpoint.	11/6	2:10 PM	3:05 PM
Checkpoint	Product Training	CP130 - Ensure Disclosure Accuracy with Checkpoint: Reviewing Peer and Industry SEC Filings with Checkpoint	With multiple sources of evolving standards and practices, see how easy it is to keep track of what is coming and prepare to disclose a proper representation of your companies reporting journey. In this session, attendees will learn how to use Checkpoint Edge to find the latest disclosures from SEC filings compared with curated samples and expert commentary from our editors.	11/6	3:45 PM	4:40 PM
Checkpoint	Product Strategy	CP500 - Examining the Power of Generative AI for Corporate Tax and Accounting Professionals	Join this discussion for a primer on generative AI. What are the implications of this fast-moving technology for the work of tax and accounting departments? This session will cover the capabilities, pitfalls and hard potential for you to know about.	11/7	10:20 AM	11:15 AM
Checkpoint	Product Strategy	CP510 - Regulatory Updates: What's Hot On Checkpoint	In this session, we'll discuss recent hot topics in taxation and financial reporting and show attendees how to find the latest updates within Checkpoint Edge, as well as answers to their tax and financial reporting research questions faster than ever before.	11/7	3:30 PM	4:25 PM
Checkpoint	Thought Leadership	CP600 - Keeping Up with Pillars 1 & 2: How Checkpoint Helps Me Cope	BEPs 2.0 is expanding the research requirements needed to stay apprised of local country compliance. Individual country divergence from OECD obligations continues to increase the complexity that tax departments face to comply in each local jurisdiction. Hear first-hand how companies using especially curated Pillar 1 & 2 research materials are able to support their tax departments in proactively keeping up with the necessary pace associated with these rapidly changing requirements.	11/8	8:00 AM	8:55 AM
Direct Tax	Product Training	DI-DOM200 - Clearing Diagnostics/Validation Errors	This session provides an overview of the enhancements to the Organizer diagnostics.	11/6	10:45 AM	11:40 AM
Direct Tax	Product Training	DI-DOM210 - Starting the New Year: Best Practices for Getting Ready	Do you know how to prepare ONESOURCE Income Tax for processing? In this session, we will provide attendees with a checklist of things to consider and some guidance on the order in which you should proceed.	11/6	1:00 PM	1:55 PM
Direct Tax	Product Training	DI-DOM230 - ONESOURCE Income Tax: Tips & Tricks	This session provides tips and tricks to ease your tax return preparation process.	11/6	2:10 PM	3:05 PM
Direct Tax	Product Training	DI-DOM240 - Getting the Most From Common State	This session will cover best practices and tips for gaining the most out of common state. Attendees will understand how to benefit from these practices to speed up their state return preparation and review process.	11/6	3:45 PM	4:40 PM
Direct Tax	Product Training	DI-DOM250 - Introduction to 1065 and State A&A for 1065 Returns	This course will cover hot topics around 1065's and the State A&A for 1065 Returns.	11/7	8:00 AM	8:55 AM
Direct Tax	Product Training	DI-DOM260 - State Apportionment Using Alteryx	This session will cover how Alteryx workflows can be leveraged to automate State Apportionment data loading and calculations.	11/7	8:00 AM	8:55 AM



Category	Type	Title	Description	Date	Start Time	End Time
Direct Tax	Product Training	DI-DOM290 - Setting Up the State Taxable Income Workpapers	This session will cover how to implement the state taxable income workpapers. You will learn a simple process that will save you time entering your state modifications and adjustments.	11/7	9:10 AM	10:05 AM
Direct Tax	Product Training	DI-DOM290H - Setting Up the State Taxable Income Workpapers (Hands-On)	This hands-on session will cover use of state taxable income workpapers. You will learn how to set up and use state taxable income workpapers to save you time with state modifications and adjustments.	11/7	10:20 AM	11:15 AM
Direct Tax	Product Training	DI-DOM370 - State Combined/Consolidated Returns Best Practices	In this informative session we will demystify state combined/consolidated return preparation and focus on best practices and tips for combined/consolidated returns.	11/7	11:30 AM	12:25 PM
Direct Tax	Product Training	DI-DOM370H - State Combined/Consolidated Returns Best Practices (Hands-On)	This hands-on session will cover the application of best practices and tips for combined/consolidated returns.	11/7	3:30 PM	4:25 PM
Direct Tax	Product Training	DI-DOM380 - Harness the Power of APIs for ONESOURCE Income Tax	This session will cover how APIs can be leveraged for loading and extracting data to and from ONESOURCE Income Tax.	11/7	4:40 PM	5:35 PM
Direct Tax	Product Strategy	DI-DOM500 - What's New In ONESOURCE Income Tax	This session provides an overview of the new features that will be released for clients for the 2023 form year.	11/7	3:30 PM	4:25 PM
Direct Tax	Product Training	DI-INTL120 - Introduction to Processing 5471s In ONESOURCE Income Tax International	This session is designed for clients that are new to ONESOURCE Income Tax International. You will learn about setting up and using the software to process your controlled foreign corporation (CFC) return, including the calculation of Subpart F, cash dividends, and the gross ups on them.	11/6	1:00 PM	1:55 PM
Direct Tax	Product Training	DI-INTL120H - Introduction to Processing 5471s In ONESOURCE Income Tax International (Hands-On)	This hands-on session is designed for clients that are new to ONESOURCE Income Tax International. You will work in the ONESOURCE Income Tax International application to process your controlled foreign corporation (CFC) return, including the calculation of Subpart F, cash dividends, and the gross-ups on those dividends. NOTE: Attendance in DI-INTL 120 is mandatory.	11/6	2:10 PM	3:05 PM
Direct Tax	Product Training	DI-INTL130 - Reconciling Transfer to Forms 5471, 8865 and 8858	In this session we will cover changes in the tax return forms over the past year. You will learn how the ONESOURCE Income Tax International module constructs information for transfer to various foreign form schedules.	11/6	3:45 PM	4:40 PM
Direct Tax	Product Training	DI-INTL140 - Reconciling Transfer to Form 1118	In this session we will cover changes in the tax return forms over the past year. You will learn how the ONESOURCE Income Tax International module constructs information for transfer to various schedules of Form 1118.	11/6	4:55 PM	5:50 PM
Direct Tax	Product Training	DI-INTL240 - Frequently Asked Questions and Best Practices for ONESOURCE Income Tax International	Want to avoid the most common ONESOURCE Income Tax International module mistakes? Solutions to many of the most frequently asked questions from clients will be the focus of this session.	11/7	8:00 AM	8:55 AM
Direct Tax	Product Training	DI-INTL270 - Processing GILTI Through ONEOURCE Income Tax	This session will cover how to process global intangible low-taxed income (GILTI) and how to populate Form 8992 through ONESOURCE Income Tax.	11/7	9:10 AM	10:05 AM
Direct Tax	Product Training	DI-INTL330 - Advanced Topics for Return Preparation Using ONESOURCE Income Tax International	Beyond the basics, this session will delve deeper into processing foreign returns and provide best practices and tips.	11/7	10:20 AM	11:15 AM



Category	Type	Title	Description	Date	Start Time	End Time
Direct Tax	Product Training	DI-INTL340 - Using ONESOURCE Income Tax International to Calculate the 163(j) Business Interest Expense Limitation for Your Foreign Entities	This session will cover all aspects of the Section 163(j) Business Interest Expense Limitation for foreign entities to include the population of data using the newly added workpaper, the processing of that data during the International Subpart F calculation, and the transfer of the calculated results to Form 5471/8990 in Organizer.	11/7	11:30 AM	12:25 PM
Direct Tax	Product Training	DI-INTL350 - Processing Foreign Derived Intangible Income (FDII) Using ONESOURCE Income Tax International	This session will cover all aspects of the processing of Foreign Derived Intangible Income (FDII) including the population of data using the newly-added Foreign Derived Income screen, the processing of that data during the International Foreign Tax Credit calculation, the allocation of any Section 250 FDII and GILTI deduction to the underlying entities, and the reports that reflect the results.	11/7	3:30 PM	4:25 PM
Direct Tax	Product Strategy	DI-INTL500 - What's New In ONESOURCE Income Tax International	This session will explore what's new and what's planned for ONESOURCE Income Tax International.	11/6	2:10 PM	3:05 PM
Direct Tax	Product Strategy	DI-INTL510 - 2024 Orbitax International Tax Platform Roadmap	This session provides an overview of what's new and what's planned for the Orbitax International Tax Platform (ITP), including integration of Country-by-Country Compliance and Reporting, International Tax Calculator web version and Global Minimum Tax to automate data feeds for safe harbor, globe income and covered taxes information.	11/6	1:00 PM	1:55 PM
Direct Tax	Product Training	DP100 - ONESOURCE Tax Provision (version 2016) Basics	This session will orient attendees to ONESOURCE Tax Provision (version 2016) by covering the navigation paradigms, data review functions, drill-down capabilities, and data entry and transfer functionality.	11/6	10:45 AM	11:40 AM
Direct Tax	Product Training	DP100H - ONESOURCE Tax Provision (version 2016) Basics (Hands-On)	This hands-on session will provide the opportunity to work in ONESOURCE Tax Provision v2016 to orient yourself to navigating, populating data, and reviewing results. NOTE: Attendance in DP100 is mandatory.	11/6	1:00 PM	1:55 PM
Direct Tax	Product Training	DP100HR - ONESOURCE Tax Provision (version 2016) Basics (Hands-On, Repeat)	This hands-on session will provide the opportunity to work in ONESOURCE Tax Provision v2016 to orient yourself to navigating, populating data, and reviewing results. NOTE: Attendance in DP100 is mandatory.	11/6	3:45 PM	4:40 PM
Direct Tax	Product Training	DP120 - How to Unlock the Return to Provision True-Up	This session will cover the automated methodology for representing federal and state return to provision entries in ONESOURCE Tax Provision, and system requirements to identify and post true-up items into the current provision dataset.	11/6	2:10 PM	3:05 PM
Direct Tax	Product Training	DP130 - A Basic Guide to ONESOURCE Workpapers	This session will cover the Workpapers add-in ribbon and manager areas of the ONESOURCE platform. It will also cover loading book/tax adjustments, extracting data for calculations and pushing the calculated values back into data entry cells for circular calculations such as State NOL and VA utilization/generation.	11/6	3:45 PM	4:40 PM
Direct Tax	Product Training	DP160 - A Complete Guide to ONESOURCE Global Access Manager	This session will cover the web-based ONESOURCE Global Access tax provision, as well as data gathering screens, available reports, sign-off sequence, questionnaires, and user setup including group functionality.	11/6	4:55 PM	5:50 PM
Direct Tax	Product Training	DP180 - Deferred Tax Presentations and More!	This session will cover the calculation logic for activity, deferred-only and balance-sheet-only data entry fields for temporary differences, classes for assignment to deferred roll-forward report columns, and much more.	11/7	8:00 AM	8:55 AM



Category	Type	Title	Description	Date	Start Time	End Time
Direct Tax	Product Training	DP180H - Deferred Tax Presentations (Hands-On)	In this hands-on session we will cover the calculation logic for activity, deferred-only and balance-sheet-only data entry fields for temporary differences, classes for assignment to deferred roll-forward report columns, and much more. NOTE: Attendance in DP180 is mandatory.	11/7	9:10 AM	10:05 AM
Direct Tax	Product Training	DP230 - Payable and Journal Entry Functionality & Reporting	This session will cover how to format payable column headers, and auto postings of RTP and current tax expenses as well as the steps included in calculating the tax journal entry, core calculation, and journal entry profiles.	11/7	10:20 AM	11:15 AM
Direct Tax	Product Training	DP250 - Topics Led By the ONESOURCE Tax Provision Steering Committee	Learn about the ONESOURCE Tax Provision steering committee's purpose and objectives, as well as how to utilize the committee to get your voice heard in the development of ONESOURCE Tax Provision.	11/7	11:30 AM	12:25 PM
Direct Tax	Product Training	DP260 - Get More from Tax Provision Data with Dashboard Reporting, API's and Connectors	Enhance your tax operations by unlocking the potential of tax provision data in this informative learning session. Explore how ONESOURCE Tax Provision (OTP) APIs, the SAP OTP connector, and Dashboards can revolutionize your tax processes by driving automation and enabling strategic analysis. Learn how to use these automation and visualization tools to pull calculated data for Global Minimum Tax, quickly understand the impact resulting from effective tax rate drivers waterfalls, and more.	11/7	3:30 PM	4:25 PM
Direct Tax	Product Training	DP310 - Advanced Reporting and Administration for ONESOURCE Tax Provision	IMPORTANT: This session will cover advanced reporting capabilities in ONESOURCE Tax Provision (version 2016) including Batch Reporting functionalities, 10K reporting, various reporting configuration options, reporting permissions, and more.	11/7	4:40 PM	5:35 PM
Direct Tax	Product Training	DP510 - ONESOURCE Tax Provision New Developments	This session will cover new enhancements to V2016 OTP, Next Gen Tax Provision and proposed enhancements for 2024. This session will also cover new API's for V2016 OTP.	11/7	10:20 AM	11:15 AM
Direct Tax	Product Training	DT110 - Streamline Your Tax Preparation Process with the New ONESOURCE DataFlow	In this session we will cover the new ONESOURCE DataFlow and show how the new technology can be leveraged for global data gathering and loaded into ONESOURCE products, as well as how extractions can be used to gain insight into your data.	11/6	10:45 AM	11:40 AM
Direct Tax	Product Training	DT120 - A Basic Guide to Platform Entities	This session will cover how to configure and administer legal entities at the Platform level and how to drive efficiency in the entity management, especially for clients who are using multiple ONESOURCE applications.	11/6	1:00 PM	1:55 PM
Direct Tax	Product Training	DT130 - ONESOURCE Calendar: Gain Visibility and Control Over Key Deadlines	Learn how ONESOURCE Calendar simplifies the tracking of tax and reporting due dates while simultaneously increasing visibility to reduce risks of missed deadlines. This session will also explore how to customize the solutions to meet your organization's needs.	11/6	2:10 PM	3:05 PM
Direct Tax	Product Training	DT140 - Introduction to ONESOURCE WorkFlow Manager - WorkFlow Manager, Global Tax Audit Manager, FileRoom	Join the Professional Services team for a look at our WorkFlow Manager, FileRoom, and Global Tax Audit Manager productivity solutions to learn about our approach to the due date and document management today, as well as our future strategy for organizing, automating, and driving your processes across ONESOURCE.	11/6	3:45 PM	4:40 PM





Category	Type	Title	Description	Date	Start Time	End Time
Direct Tax	Product Training	DT190 - Introduction to ONESOURCE Statutory Reporting	This session will provide an exploration of the benefits that businesses can achieve by deploying ONESOURCE Statutory Reporting into their statutory reporting process.	11/6	4:55 PM	5:50 PM
Direct Tax	Product Training	DT210 - Integration of Data Between ONESOURCE Income Tax, Tax Provision and State Apportionment	This session will provide an overview of the data that flows between ONESOURCE Income Tax, Tax Provision, and State Apportionment, as well as the setup and execution processes.	11/7	8:00 AM	8:55 AM
Direct Tax	Product Training	DT220 - Using ONESOURCE State Apportionment from a State Planning and Audit Perspective	This session will provide an overview of ONESOURCE State Apportionment functionality and the value it can provide from a planning and audit perspective.	11/7	9:10 AM	10:05 AM
Direct Tax	Product Training	DT250 - Alteryx and Leveraging APIs	This course will cover how Alteryx can be used to extract and load data into ONESOURCE solutions using existing APIs between Alteryx and ONESOURCE solutions.	11/7	10:20 AM	11:15 AM
Direct Tax	Product Training	DT300 - Crowe: Using the Flexibility of DataFlow to Gather Information for Tax Provision and RTP	Learn how to streamline DataFlow templates for multiple calculations leveraging design best practices.	11/7	11:30 AM	12:25 PM
Direct Tax	Product Training	DT480 - Building An Integrated Tax Technology Ecosystem: Demystifying APIs and Connectors	What's the difference between an API, a connector, and an integration? What efficiencies and benefits can they offer? This session will demystify the power of APIs and connectors in building an integrated tax technology ecosystem. Discover how seamless data exchange and system integrations can enhance efficiency, accuracy, and streamline workflows. Gain insights into best practices and real-world examples to unleash the full potential of your tax technology stack.	11/8	8:00 AM	8:55 AM
Direct Tax	Product Training	DT490 - ONESOURCE WorkFlow Automation: Bolster Process Efficiency and the Speed to Compliance	Gain more control through automation in the compliance process. Join us to discuss workflow automation in tax compliance with our new Workflow solution! Discover how to enhance efficiency and compliance by standardizing, controlling, and monitoring the status and resources of complex processes. Learn useful techniques to keep your complicated tax processes on track while optimizing productivity. Don't miss this opportunity to streamline your tax compliance workflows.	11/7	4:40 PM	5:35 PM
Direct Tax	Product Strategy	DT500 - Direct Tax Horizons	In this session, participants will acquire valuable knowledge about crucial industry trends encompassing new technologies, emerging opportunities, and the strategic handling of Direct tax portfolios. Participants will get an exclusive preview of our Direct Tax product strategy leveraging early AI innovations.	11/6	1:00 PM	1:55 PM
Direct Tax	Thought Leadership	DT600 - Pillar 2: Practical Advice for Managing Global Minimum Tax Data Challenges Leveraging ONESOURCE Tax Provision and Other Sources	Explore options to automate data sourcing for Global Minimum Tax from various external systems, including ONESOURCE Tax Provision. Learn about leveraging automated workflows to standardize and routinize data loading during time sensitive quarter closes. See the API connection between Orbitax GMT and ONESOURCE Tax Provision in action.	11/6	10:45 AM	11:40 AM
Direct Tax	Thought Leadership	DT610 - Getting In-House Tax In Order to Withstand the Unknown: A Story About Data	Is your in-house tax team still manually entering data, validating it, and reconciling it to prepare it for use internally or with an advisory firm? There is a better way to manage data and the cost is surprisingly low when compared to its return on investment. Learn how ONESOURCE customers used data as a starting point for getting their in-house tax process in order. Then, create your own journey with the help of insight from their experiences.	11/6	1:00 PM	1:55 PM



Category	Type	Title	Description	Date	Start Time	End Time
Direct Tax	Thought Leadership	DT620 - Tax Automation - How It Strengthens Your Control of the Tax Process Panel Discussion	Manually managing any aspect of the tax process lowers your control and slows the compliance process down. Similar to handing your credit card to a person, manually doing anything in tax puts your business at risk. All too often we hear customers say that they are minimizing or slowing their adoption of tax automation for concerns about loss of control and security. Join this panel of clients and cloud security and advisory firm tax process experts to learn how advancing tax automation actually strengthens your control of the tax process using a step-by-step guide to transition from manual to automated systems. This session will explore key tools, technologies, best practices, and insights into maximizing efficiency, accuracy, and compliance in tax processes. Panel: Alteryx	11/6	2:10 PM	3:05 PM
Direct Tax	Thought Leadership	DT630 - Building Bridges - Integrating Tax Systems with ERP and Financial Platforms Panel Discussion	Increasing business, technology and legislative changes are placing unforeseen demands on the Tax function to manage data. Having a centralized and flexible way to manage data is increasingly seen as a must-have. In this session, we will explore how a data warehouse for Tax can be used to support these growing demands via use cases and sharing benefits realized utilizing this approach. Panel: DMA	11/6	3:45 PM	4:40 PM
Direct Tax	Thought Leadership	DT640 - Case Studies In Successful Tax Automation: Lessons From Early Adopters	Tax automation is widely recognized as a way of achieving efficiency in the tax process, yet the goal of that transformation can often get set aside under the pressures of managing the day-to-day tax process. Join us to hear two stories of customer journeys to gain buy-in, the needed budget, and execute on delivering tax automation.	11/6	4:55 PM	5:50 PM
Direct Tax	Thought Leadership	DT650 - Making A Technology Purchase Decision In the Era of Global Minimum Tax: Maximizing Opportunities and Minimizing Risks	A significant 74% of Chief Tax Officers report that the OECD's BEPS Pillar 2 initiatives are impacting operations and tax planning. Concurrently, surveyed tax professionals lack time and budget for implementation of a technology investment. This session offers actionable insights for selecting technology to manage Pillar 2, covering system integration, calculation, reporting, process automation, and implementation. Focus: C-level conversation about GMT, impacts to business.	11/7	8:00 AM	8:55 AM
Direct Tax	Thought Leadership	DT660 - Take the Sting Out of State and Local Tax Regulations with our SALT Update	Test your knowledge of state and local tax regulations widely impacting businesses in the US. Join our interactive session to explore these new regulations, benchmark your understanding with other tax professionals and gain insights about how to stay compliant.	11/7	9:10 AM	10:05 AM
Direct Tax	Thought Leadership	DT700 - BDO: Practical Applications of AI In Tax	Learn how AI is already being applied to drastically improve tax data management, delivery of tax services, and how organizations are deploying it internally to improve forecasting, modeling, testing, communication, and more.	11/7	10:20 AM	11:15 AM
Direct Tax	Thought Leadership	DT710 - Crowe: APIs and Reporting Solutions for Emerging Tax Issues	Learn how APIs and dynamic reporting options are used in dealing with emerging tax issues such as OECD BEPS Pillar 2 and FASB proposed tax disclosure changes.	11/7	3:30 PM	4:25 PM
Direct Tax	Thought Leadership	DT720 - EY: GAAP and Non-GAAP ETR Reporting with Tax Provision	Discover how Charles River Laboratories expanded the use of ONESOURCE Tax Provision to enhance the ETR process for year-end GAAP and Non-GAAP Reporting. The session will cover key design decisions and a demo of an enhanced ETR process.	11/7	3:30 PM	4:25 PM
Direct Tax	Thought Leadership	DT730 - EY: Leveraging AI to Future Proof Your Tax Department	Explore the future of tax leveraging Artificial Intelligence and Machine Learning and how to integrate these new technologies into your tax processes.	11/7	4:40 PM	5:35 PM



Category	Type	Title	Description	Date	Start Time	End Time
Direct Tax	Thought Leadership	DT740 - Deloitte: Harnessing the Power of Tax Data - Building A Responsive Data Solution	Discover the critical role of tax data management in the face of evolving global tax changes, such as Pillar 2, and learn how to build a flexible and adaptive tax data solution that enables seamless compliance, empowers data-driven decision-making, and supports hybrid operating models including co-sourcing.	11/8	8:00 AM	8:55 AM
Direct Tax	Thought Leadership	DT750 - EY: Unlocking the Value of ONESOURCE Tax Provision Data with Microsoft Power BI	NetApp and EY will share leading practices and lessons learned for using Microsoft Power BI to bring your ONESOURCE Tax Provision data to life using visualizations that can enhance review processes and help you deliver more value in your management reporting.	11/6	4:55 PM	5:50 PM
Direct Tax	Thought Leadership	DT760 - EY: Orbitax Global Minimal Tax Implementation Best Practices	This session will present leading practices for the design, configuration and testing of calculations for BEPS Pillar 2 using the Orbitax Global Minimum Tax solution. A client case study will be used to show how the application was used for computing Pillar 2 taxes and integrated into client tax processes.	11/8	9:10 AM	10:05 AM
Direct Tax	Thought Leadership	DT780 - Grant Thornton: Integrating ONESOURCE Data Hub on the Journey to Self-Services Analytics with Grant Thornton	Discover legacy provision challenges and how ONESOURCE Data Hub can help to empower tax departments with connected applications, efficient data storage and real-time analytics for tax insights.	11/8	10:20 AM	11:15 AM
Direct Tax	Thought Leadership	DT790 - KPMG: Excellence In Practice - The UnitedHealth Group Journey	Discuss how UnitedHealth Group is utilizing the ONESOURCE platform to efficiently manage its tax processes and data. Discuss how UHG is implementing ONESOURCE Data Hub and Modern DataFlow, while building out a roadmap for a smarter, data-driven tax process to support its growing tax needs.	11/7	9:10 AM	10:05 AM
Direct Tax	Product Training	O150 - Introduction to Alteryx	This course will provide an introduction to Alteryx and how to build workflows and Alteryx Designer basics.	11/6	10:45 AM	11:40 AM
Direct Tax	Product Training	O160 - Introduction to ONESOURCE Data Hub	This session will provide an introduction to ONESOURCE Data Hub and how data can be loaded from the ERP, mapped into various formats within ONESOURCE Data Hub, and loaded into various ONESOURCE Solutions.	11/6	1:00 PM	1:55 PM
Direct Tax	Product Training	O170 - ONESOURCE Data Hub - Integration and Dashboarding Reporting	This session will highlight how ONESOURCE Data Hub can be integrated with ONESOURCE products and leveraged to generate various Dashboard reports using data from various ONESOURCE products.	11/6	2:10 PM	3:05 PM
Direct Tax	Product Training	O180 - Turn Your Accountants Into Rockstars: Making the Most of Your ONESOURCE Tools	In this session we will share real-life examples of work situations where accurate leverage of ONESOURCE University, ONESOURCE Support, and the ONESOURCE Help Library have made our client users look like pros. We will be walking through a series of short narratives that tell the story of our ONESOURCE resources.	11/6	3:45 PM	4:40 PM
Direct Tax	Product Training	O200 - Enabling Change - Best Ways to Prepare the Team for Technology Changes	Join us to learn more about proven strategies and insights for how to successfully manage change associated with re-imagining processes leveraging technology solutions.	11/7	8:00 AM	8:55 AM
Direct Tax	Product Training	O300 - ONESOURCE Tax Provision and Alteryx	This session will cover ONESOURCE Tax Provision automation and analytics with Alteryx.	11/8	8:00 AM	8:55 AM
Direct Tax	Product Training	O440 - User Administration - Managing User Access	This session will cover how to add, update and delete user access. We'll cover tips and tricks to help you manage user access in the ONESOURCE Administration feature and the ONESOURCE Tax Information Security feature.	11/8	9:10 AM	10:05 AM



Category	Type	Title	Description	Date	Start Time	End Time
Direct Tax	Product Training	O470 - A Tour of the Customer Center!	This session will cover how to navigate through the ONESOURCE Customer Center to find information on scheduled outages, system releases, eNewz reports and more.	11/8	10:20 AM	11:15 AM
Direct Tax	Product Strategy	O510 - What's New and Coming Soon In ONESOURCE DataFlow	Learn first-hand from the Product team about the new ONESOURCE DataFlow and the upcoming functionalities. Determine how new technology will position your organization to improve efficiencies and increase the control and accuracy of your data collection process. You will also gain insight into the product roadmap.	11/6	2:10 PM	3:05 PM
Direct Tax	Product Strategy	O520 - What's New and Coming Soon In ONESOURCE Data Capabilities	Join the Product team for a closer look into recent key developments, a preview of future enhancements, and our ongoing direction for data management in the ONESOURCE platform.	11/6	4:55 PM	5:50 PM
Direct Tax	Product Strategy	O530 - ONESOURCE Platform and Administration: What's New and What's Next?	Join the Product team for a closer look into recent key developments, a preview of future enhancements, and our ongoing direction for the ONESOURCE platform.	11/7	9:10 AM	10:05 AM
Direct Tax	Product Strategy	O540 - ONESOURCE WorkFlow: A New Approach to Process Management and Automation	Join the Product team for a look into our new modern workflow solution and learn how you can gain control and real-time visibility into your tax and reporting processes across ONESOURCE. More integration, automation and collaboration translates to increased efficiency and risk reduction.	11/7	3:30 PM	4:25 PM
Direct Tax	Thought Leadership	O710 - Deloitte: Art of the Possible – Driving Digital Transformation in Tax	This session will focus on the types of discussions that promote outside-of-the-box thinking and planning to drive digital transformation of your tax processes, which can ultimately lead to designing "art of the possible" strategies to get there.	11/7	4:40 PM	5:35 PM
Direct Tax	Thought Leadership	O720 - KPMG: Supercharge Your State Income Tax Function By Unleashing the Power of the ONESOURCE Suite of Tools and Alteryx to Automate Both Compliance and Provision Processes	State income tax has always been an area where thousands of hours are spent extracting and analyzing data. KPMG will show how to solve for these challenges with the use of all the ONESOURCE products specific to state, Alteryx and connected modeling. KPMG will also share some of the valuable use cases that has been transformative to the state income tax life cycle as well as demo a state tax model used to automate return preparation, estimates, extension, and provision.	11/7	10:20 AM	11:15 AM
Direct Tax	Thought Leadership	O730 - KPMG: Raw-to-Refined, Converting Data for Use In the Tax Lifecycle - A Focus On Key Use Cases	This session will follow a typical data journey in a tax department by focusing on fixed assets, use case 2 and use case 3. We will explore how data can be extracted, transformed and loaded from source systems via Alteryx and APIs, stored and transformed for tax using the structures provided in ONESOURCE Data Hub, and then used in the tax process to capture data-driven insights using PowerBI connectors.	11/7	3:30 PM	4:25 PM
Direct Tax	Thought Leadership	O740 - EY: Global Tax Administrations - The Journey to Digital Tax	This session will cover the digital tax administration, activities and trends of the tax authorities, and the impacts of digitization on companies.	11/6	1:00 PM	1:55 PM
Direct Tax	Thought Leadership	O750 - KPMG: Customer Roundtable - Leading Practices for ONESOURCE and Alteryx Implementation & Integration with the ERP System	Customers discuss their experiences working with Alteryx and various ONESOURCE products to maximize efficiency in their Tax department and integrations to their ERP systems.	11/6	3:45 PM	4:40 PM





Category	Type	Title	Description	Date	Start Time	End Time
Direct Tax	Thought Leadership	O770 - Grant Thornton: Streamline Your Tax Operations - How to Configure A ONESOURCE-integrated Portal By Leveraging Your Organization's Microsoft Instance	Managing your tax department and ensuring visibility and control can be challenging. Learn how to leverage your organization's MSFT instance to unify your ONESOURCE applications, files and due dates under one umbrella for improved operational efficiency.	11/7	9:10 AM	10:05 AM
Direct Tax	Thought Leadership	O780 - Deloitte: The Benefits of Digitizing Your Tax Department Using the Full Suite of Thomson Reuters Products	In this session, you will learn the efficiencies gained in using the full suite of the Thomson Reuters products.	11/8	9:10 AM	10:05 AM
Direct Tax	Thought Leadership	O790 - Deloitte: Kenvue/Deloitte - ONESOURCE Empowers A Successful Tax Process and Technology Setup During A Spin-off	Kenvue will share how they made the decision to implement the ONESOURCE suite (ONESOURCE Tax Provision, DataFlow, ONESOURCE UTP, Alteryx, and GAM) as they were undergoing a spin off. They will explain how the ONESOURCE suite offered more flexibility and visibility to the data and reporting during this process. They will also discuss the different challenges they encountered along the way with resources, dual reporting, data management and tight timelines.	11/7	11:30 AM	12:25 PM
Exams	Exam Testing	UCE100.1 - ONESOURCE University Certified User Program Testing	The ONESOURCE Certified User Program offers User Certification(s) to individual ONESOURCE professionals. Certification allows a user to demonstrate a recognized level of expertise within a product by passing a product-specific exam. Certification provides professionals an opportunity to differentiate themselves in the market, validate product knowledge and proficiency, and earn industry-recognized digital certificates and badges. Since its initial launch in 2019, we have seen over 300% growth in active Certified Users. Certify today and join the community of 700+ ONESOURCE Certified Users.	11/5	3:00 PM	5:00 PM
Exams	Exam Testing	UCE100.2 - ONESOURCE University Certified User Program Testing	The ONESOURCE Certified User Program offers User Certification(s) to individual ONESOURCE professionals. Certification allows a user to demonstrate a recognized level of expertise within a product by passing a product-specific exam. Certification provides professionals an opportunity to differentiate themselves in the market, validate product knowledge and proficiency, and earn industry-recognized digital certificates and badges. Since its initial launch in 2019, we have seen over 300% growth in active Certified Users. Certify today and join the community of 700+ ONESOURCE Certified Users.	11/6	10:00 AM	12:00 PM
Exams	Exam Testing	UCE100.3 - ONESOURCE University Certified User Program Testing	The ONESOURCE Certified User Program offers User Certification(s) to individual ONESOURCE professionals. Certification allows a user to demonstrate a recognized level of expertise within a product by passing a product-specific exam. Certification provides professionals an opportunity to differentiate themselves in the market, validate product knowledge and proficiency, and earn industry-recognized digital certificates and badges. Since its initial launch in 2019, we have seen over 300% growth in active Certified Users. Certify today and join the community of 700+ ONESOURCE Certified Users.	11/8	9:00 AM	11:00 AM
Global Trade	Product Training	GT300 - Classification Tips and the New UI: Get Ahead of Classification Changes with Tariff Changes Manager, Using Artificial Intelligence to Manage Your Classifications	In this product training session, review the new Global Classification user interface released this year, as well as learn the best ways to use ONESOURCE Global Classification (GC) to manage your classification data. We will review tools such as Tariff Changes Manager, HS Mapping, Smart HS, and ECN to help you get ahead and stay on top of classification changes.	11/7	10:20 AM	11:15 AM



Category	Type	Title	Description	Date	Start Time	End Time
Global Trade	Product Training	GT310 - Self-Help and Platform Tools: How to Leverage BPM Automation & Visibility to Increase Efficiency, Report Builder for Business Insights and Navigate File Load Manager	Explore Self-Help tools such as File Load Manager designed to provide user independence related to data interfaces. Learn about Platform Tools, such as Business Process Management (BPM) and Report Builder that can provide process automation and visibility, as well as the ability to run business reporting and dive into data insights.	11/7	8:00 AM	8:55 AM
Global Trade	Product Training	GT320 - Navigating the New DPS Search Screen	This session will provide a comprehensive overview of the new manual DPS Search screen that drives the ONESOURCE DPS module. Explore the algorithm behind the screening and review tips and best practices for leveraging the advanced engine.	11/6	2:10 PM	3:05 PM
Global Trade	Product Training	GT330 - Leveraging PGA Management for Smoother Importing	This product training session will focus on tools within the ONESOURCE platform that support the assignment and maintenance of PGA data. Explore the PGA Management options within the ONESOURCE Global Classification module and how Global Trade Content can help drive PGA decisions.	11/7	8:00 AM	8:55 AM
Global Trade	Product Training	GT340 - Utilizing Content and Content Analyzers to Drive Sourcing Decisions	This product training session will explore the role of Global Trade Content in sourcing decisions and opportunities for limiting duty impact by leveraging the Content Analyzer suite - Trade Lane Analyzer and Tariff Analyzer.	11/6	10:45 AM	11:40 AM
Global Trade	Product Training	GT350 - FTA Analyzer: Taking Advantage of FTA Opportunities for Supply Chain Success	Join us to review the FTA Analyzer tool: a decision-making and analytics tool that delivers up-to-the-day reports detailing which sourcing countries, trade lanes, and trade agreements provide the most favorable return on investment based on your company-specific trade data.	11/6	4:55 PM	5:50 PM
Global Trade	Product Training	GT360 - Making the Most Out Of Your GTM Ecosystem	This product training session will review the components of the GTM ecosystem and how ONESOURCE Global Trade modules work best together to create an efficient and effective trade compliance platform.	11/8	10:20 AM	11:15 AM
Global Trade	Product Training	GT370 - Post Implementation Best Practices	This session will review best practice recommendations for staying up-to-date and getting the most out of your ONESOURCE GTM solution after go live, including Subscription Services, Training Passport, and other service offerings.	11/7	4:40 PM	5:35 PM
Global Trade	Product Training	GT380 - US Foreign Trade Zone Workshop (Day 1)	Join us for an in-depth 10-hour workshop focusing on the US Foreign Trade Zone. We will walk through comprehensive training on FTZ distribution processing, CBP reports, FTZ validation & data correction tools, and tips on troubleshooting inventory out-of-balances. This workshop is taught by an LCB and experienced TR Professional Services team member and will be eligible for ONESOURCE University certification (pending exam results at the end of the conference).	11/6	10:45 AM	5:50 PM
Global Trade	Product Training	GT380 - US Foreign Trade Zone Workshop (Day 2)	Join us for an in-depth 10-hour workshop focusing on the US Foreign Trade Zone. We will walk through comprehensive training on FTZ distribution processing, CBP reports, FTZ validation & data correction tools, and tips on troubleshooting inventory out-of-balances. This workshop is taught by an LCB and experienced TR Professional Services team member and will be eligible for ONESOURCE University certification (pending exam results at the end of the conference).	11/7	9:10 AM	5:35 PM
Global Trade	Product Strategy	GT500 - ONESOURCE Global Trade Product Roadmap	Join us as we introduce our 2024 product roadmap, describing our key product initiatives to the ONESOURCE Global Trade suite of products. In this session, we will discuss the progress of our Catalyst program, planned future enhancements, and how Generative AI will help shape GTM software.	11/8	8:00 AM	8:55 AM



Category	Type	Title	Description	Date	Start Time	End Time
Global Trade	Product Strategy	GT510 - ONESOURCE Global Trade Customer Panel	A SYNERGY favorite! Join our 4Q Customer Advisory Board meeting to provide us with your candid feedback, share ideas, ask questions and discuss issues of the day with your global trade peers.	11/8	9:10 AM	10:05 AM
Global Trade	Thought Leadership	GT600 - Manage the Forced Labor and Other ESG Risk In Your Supply Chain	Meet with our blue ribbon panel from Trade and Risk Management teams to learn about ESG risk in your supply chain - how to detect it, how to analyze it, and the methods and tools you can use to avoid it.	11/6	1:00 PM	1:55 PM
Global Trade	Thought Leadership	GT610 - How to Save Money In Your Supply Chain	Avoiding risk is important, but don't forget the more tangible benefits of compliance! Learn how efficiencies, duty savings and optimization, fee avoidance and deferral, and privileged entry status can all be yours if you engage with the opportunities afforded by the modern regulatory landscape.	11/6	3:45 PM	4:40 PM
Global Trade	Thought Leadership	GT620 - The Shape of Things to Come: Global Trade in 2024	Trade CBPBM, deforestation, export controls, Customs framework, de minimis, China policy, the Cassidy bill, and more. Our presenters give their predictions of what is to come in 2024; the headwinds and tailwinds, the risks and the opportunities.	11/7	9:10 AM	10:05 AM
Global Trade	Thought Leadership	GT630 - Benchmark Your Department Against Your Peers: State of Global Trade Report Readout	How does your global trade practice area measure up? Join us to benchmark your global trade key metrics against the results of this year's Thomson Reuter's Institute State of Global Trade Report readout.	11/7	3:30 PM	4:25 PM
Global Trade	Thought Leadership	GT640 - It's Already Here: Keeping Up with Trade Developments In An AI World	Artificial Intelligence (AI) is the hot topic of 2023, but what is it and how can it be used? How should you change your compliance program for AI to maximize your benefit and keep up with the competition?	11/7	11:30 AM	12:25 PM
Indirect Tax	Product Training	IDT200 - Enabling Industry Specific IDT Content	This session will demonstrate the basic configuration steps necessary to properly enable Oil & Gas, Retail, Manufacturing and other specialty Content sets.	11/7	4:40 PM	5:35 PM
Indirect Tax	Product Training	IDT210 - IDT Data Management - Current and Future State	This session will cover how to extract calculation data from ONESOURCE Reports and Analytics. We will focus on the current and future state of Data Access and Data Management.	11/8	8:00 AM	8:55 AM
Indirect Tax	Product Training	IDT220 - How to Extract User Defined Content Using Content Extract	In this session, Thomson Reuters Product Management and Professional Services will share the capabilities of Thomson Reuters Indirect Tax Content Extract product which allows customers to extract user defined content based on your unique tax policy configured in Enterprise Cloud. Attendees will learn about actual customer use cases and the process for deploying Content Extract in your organization.	11/8	10:20 AM	11:15 AM
Indirect Tax	Product Training	IDT300 - Utilizing APIs to Automate Your ONESOURCE Indirect Compliance for VAT	This course demonstrates the use of APIs to interact with the ONESOURCE Compliance for VAT application and how automation could reduce preparation time.	11/7	4:40 PM	5:35 PM
Indirect Tax	Product Training	IDT400 - IDT Migration, Promotion and Change Management Best Practice	Join us for a conversation on how to optimally and effectively manage, validate and execute changes to your solution.	11/8	9:10 AM	10:05 AM
Indirect Tax	Product Training	IDT410H - IDT Model Scenarios - Best Practices (Hands-On)	This session will provide a hands-on opportunity to learn how to troubleshoot rates and configurations with Model Scenarios.	11/7	8:00 AM	8:55 AM



Category	Type	Title	Description	Date	Start Time	End Time
Indirect Tax	Product Training	IDT420H - IDT Configuration Best Practices (Hands-On)	Join us for a hands-on demonstration on how to optimize Determination configurations for easier maintenance and troubleshooting.	11/7	11:30 AM	12:25 PM
Indirect Tax	Product Training	IDT430 - Indirect Tax Integration Principles for Custom Connectors	An overview of ONESOURCE Indirect Tax APIs, information available, and best practices for constructing custom connectors.	11/7	4:40 PM	5:35 PM
Indirect Tax	Product Strategy	IDT500 - Living On The Edge: Indirect Tax's Hybrid Cloud Offering	This session will provide details on Determination Anywhere, ONESOURCE's Indirect Tax's innovative edge computing offering providing the benefits of a SaaS offering with the speed and control of on premise.	11/7	8:00 AM	8:55 AM
Indirect Tax	Product Strategy	IDT510 - What's Next for Indirect Tax Original	This session will provide details on TR's plans for Indirect Tax's Original code line including recent improvements as well as insight into our End-of-Life Strategy and how Thomson Reuters will support your transition.	11/6	3:45 PM	4:40 PM
Indirect Tax	Product Strategy	IDT520 - What's New with ONESOURCE Determination	This session will review the enhancements to the ONESOURCE Determination, the indirect tax calculation engine, over the last year. Learn about the design concepts, functional changes, and the new indirect tax features on the ONESOURCE platform.	11/7	10:20 AM	11:15 AM
Indirect Tax	Product Strategy	IDT540 - Indirect Tax Determination's Focus On the Customer Experience	In this session we will share some of the recent and upcoming changes we are making to improve your user experience using ONESOURCE Determination including UI performance improvements and design improvements the Product team has implemented and is planning and an opportunity to share your feedback on where to focus next.	11/6	2:10 PM	3:05 PM
Indirect Tax	Product Strategy	IDT550 - What's New with Indirect Tax Integrations	An overview of the latest product changes, enhancements, and features, as well as an outlook on upcoming release items and new product offerings related to ERP and systems integrations.	11/8	9:10 AM	10:05 AM
Indirect Tax	Product Strategy	IDT560 - Deep Dive on the Enhancements and New Integrations for SAP Solutions	A demo-oriented session of new features added to our SAP ECC & S/4HANA Integrations and our new standard integrations for SAP Business One.	11/6	2:10 PM	3:05 PM
Indirect Tax	Product Strategy	IDT570 - Deep Dive on the Enhancements for Oracle Cloud ERP and Coupa Integrations	A demo-oriented session of new features added to our Oracle Cloud ERP Integration and our new integration for Coupa procurement solution.	11/7	11:30 AM	12:25 PM
Indirect Tax	Product Strategy	IDT580 - ONESOURCE Indirect Tax Market Expansion	Attend this session to learn about our Indirect Tax industry specific strategy. We continue to invest more into specific industry solutions which includes content and capabilities to support tax treatments in industries such as Retail, and Oil and Gas. Beyond industry-specific solutions, we are expanding to include tax treatments such as Withholding Taxes in a variety of geographies. We will take a look at the future and where we plan to go next.	11/7	10:20 AM	11:15 AM
Indirect Tax	Product Strategy	IDT590 - ONESOURCE Indirect Compliance - VAT/GST: Global Compliance Automation Now and Next	Attend this session to learn about recent compliance developments and how ONESOURCE keep you up-to-date with regulatory events and offers exciting new capabilities as well as API automation to make sure your business is operating to maximum efficiency. This session will also provide a glimpse into our upcoming global compliance strategy.	11/7	9:10 AM	10:05 AM





Category	Type	Title	Description	Date	Start Time	End Time
Indirect Tax	Product Strategy	IDT591 - ONESOURCE Sales and Use Tax Compliance: A Journey to New Horizons	Attend this session to learn about our API journey that maximizes value across the configuration of new entities and increases business processes efficiencies when you prepare and file tax returns. Additionally, learn about new value add capabilities such as integration to payment processing platforms, and other value add capabilities.	11/8	10:20 AM	11:15 AM
Indirect Tax	Product Strategy	IDT592 - ONESOURCE E-Invoicing: Global End-to-End E-Invoicing Solution	Attend this session to learn more about Thomson Reuters exciting launch of ONESOURCE E-Invoicing, how this solution can meet your global e-invoicing requirements today and learn more on how this product will evolve to meet future indirect compliance needs.	11/7	8:00 AM	8:55 AM
Indirect Tax	Product Strategy	IDT594 - Indirect Tax Horizons	In this session, participants will acquire valuable knowledge about crucial industry trends encompassing AI technologies, emerging opportunities, and the strategic handling of indirect tax portfolios.	11/6	10:45 AM	11:40 AM
Indirect Tax	Thought Leadership	IDT600 - Discover the Power Of ONESOURCE Determination Enterprise: Upgrading to ONESOURCE Determination Enterprise	Discover the power of ONESOURCE Determination Enterprise with a comprehensive overview of the exciting features and enhancements, developed using the latest innovation in technology, to meet the needs of our valued ONESOURCE Original customers. Attendees will gain a thorough understanding of the latest functionality and associated benefits that ONESOURCE Determination Enterprise offers, including reducing the total cost of compliance, eliminating manual processes, and removing IT requirements and administration. ONESOURCE Determination Enterprise gives indirect tax professionals the tools, time, and strategic insights to elevate their indirect tax function.	11/6	4:55 PM	5:50 PM
Indirect Tax	Thought Leadership	IDT610 - ESG Investments In Renewable Energy and the Impact to the Tax Department of the Future	Oil and gas companies are investing in and becoming more like utility companies with large portfolios of renewable energy assets, becoming more of an "energy" provider than a traditional oil and gas company. Auto manufacturers are transforming into "gas" (refuelling) stations for the EV charging world. Tax reporting standards continue to evolve as state and federal governments upgrade their systems and require more real-time data and reporting. Join this panel discussion to learn more about industry trends revolving around environmental, sustainability and governance to gain a better understanding of where capital investments are being made within ESG and renewable/alternative energy along with its impact to the tax department.	11/7	4:40 PM	5:35 PM
Indirect Tax	Thought Leadership	IDT630 - E-Invoicing Regulatory Update: Preparing US Tax Professionals for 2024 and Beyond	Globally, e-invoicing/continuous-transaction-controls (CTCs), are nothing new, nor are they slowing down. In 2022 alone, there were approximately 150 new mandates impacting businesses worldwide. For US-based multinational corporations, keeping up with the volume of new regulations and changes to existing ones can be a full-time job... for multiple employees. In this session we'll cover some of the most important updates in e-invoicing/CTC mandates and how a strategic approach will simplify complexity, reduce compliance costs, and offer a smoother path forward.	11/6	2:10 PM	3:05 PM
Indirect Tax	Thought Leadership	IDT700 - KPMG: BRIMming with Complexity - A Case Study On the Custom Integration Between SAP BRIM and ONESOURCE	In this session, we will deep dive on the unique hurdles and creative workarounds implemented to meet business requirements while implementing SAP BRIM to ONESOURCE via custom integration using SAP Global Next.	11/7	9:10 AM	10:05 AM
Indirect Tax	Thought Leadership	IDT710 - Deloitte: As the Indirect Tax World Embraces E-Invoicing, A Global Unified Vision Is the Key to Success	Learn how Pagero and Deloitte can help you develop a unified global approach and methodology to comply with the increasing requirements of e-invoicing around the world.	11/7	11:30 AM	12:25 PM



Category	Type	Title	Description	Date	Start Time	End Time
Indirect Tax	Thought Leadership	IDT720 - BDO: Real Life Application of Emerging Trends In Indirect Tax	Today's tax function is faced with an ever-changing business environment that impacts tax rules and regulations. State and local tax authorities expect compliance and have developed approaches that require tax functions to be highly responsive and nimble.  BDO's Indirect Tax Automation professionals will discuss best practice approaches, including how ONESOURCE Indirect Tax Determination (OID) and the Integration for SAP (FKA Global Next) can be configured to handle some of the trending indirect tax scenarios that are often more complex. In detail, we will discuss taxation of Digital Goods & Services (ex: NFTs); leveraging the OID Integration for SAP in the Tax Code configuration for global deployments; and Vendor Charged Tax Methodology and leading practices.	11/8	9:10 AM	10:05 AM
Indirect Tax	Thought Leadership	IDT730 - Deloitte: Oil & Gas - Indirect Tax Trends and Transformational Themes	In this session, you will learn about Oil & Gas industry challenges for tax calculation and automation, and how organizations are overcoming such complexities utilizing Cloud ERPs and complementary Tax solutions.	11/6	3:45 PM	4:40 PM
Indirect Tax	Thought Leadership	IDT740 - KPMG: Bausch & Lomb Customer Case Study - Global ONESOURCE Indirect Tax Determination Implementation with SAP S/4HANA	Bausch & Lomb has embarked on a global Financial Transformation project with SAP S/4HANA and ONESOURCE Indirect Tax Determination. We will review the implementation approach and how ONESOURCE has added significant value to Bausch & Lomb in managing its indirect tax calculation and reporting requirements.	11/6	4:55 PM	5:50 PM
Indirect Tax	Thought Leadership	IDT750 - KPMG: Motor Fuels Excise Taxes - Best Practices for Data, Workflow and Compliance	Compliance data is at the bottom of the hill. Every single click, save, and refresh within your ERP could affect the accuracy of the data in your firm's compliance filing extracts. Good maintenance is paramount to keep your compliance filing systems running clean and efficient. Let us walk through how minor data elements result in huge snowballs rolling down into compliance.	11/7	3:30 PM	4:25 PM
Indirect Tax	Thought Leadership	IDT780 - Grant Thornton: Digital Onboarding - How Intelligent RPA Can Accelerate Implementation and Enhance the Maintenance of ONESOURCE Indirect Tax Determination	Tax engine implementations have long been expensive, time-consuming and inflexible. We will demonstrate how technology can assist with implementation, documentation, maintenance and testing of the tax engine to save time without sacrificing quality.	11/8	8:00 AM	8:55 AM
Indirect Tax	Thought Leadership	IDT790 - EY: Indirect Tax Implementation Tips and Tricks with Oracle Cloud ERP	This session outlines the key tips and tricks involved in implementing tax engines, including process flow, design, master data, and tax calculation verification with Oracle Cloud ERP. Managing post-implementation challenges such as compliance, resolving ongoing issues, and staying up to date with changing regulations is equally important. The session concludes with best practices that emphasize the importance of a dedicated project team and accurate documentation related to Oracle Cloud ERP and ONESOURCE. By following the tips and tricks outlined in this session, organizations can achieve a successful indirect tax implementation with ONESOURCE and Oracle Cloud ERP and adapt to the evolving tax landscape effectively.	11/6	1:00 PM	1:55 PM
Indirect Tax	Thought Leadership	O700 - BDO: Global Indirect Tax and SAP - An Agile Approach at Sims Metal Management	This session will review BDO's best practice approach as well as lessons learned during Sims Metal Management's current global indirect tax implementation with SAP S/4HANA (Fiori). Sims Metal Management is leveraging ONESOURCE Indirect Tax Determination (IDT), the Data File Integrator (DFI), ONESOURCE Statutory Reporting, and ONESOURCE Indirect Compliance to automate their global indirect tax function. Learn how Thomson Reuters' innovative tools provides solutions that are flexible and allow the team to design agile stop gap solutions and mitigate long project timelines during multi-year ERP implementations.	11/7	11:30 AM	12:25 PM



Category	Type	Title	Description	Date	Start Time	End Time
Indirect Tax	Thought Leadership	O760 - Crowe: Leveraging and Transforming Indirect Tax Data for State Apportionment	Explore how to leverage indirect tax data across systems in completing state apportionment calculations. Examples presented include using ONESOURCE Indirect Tax Determination data, transformed with Alteryx, to populate ONESOURCE State Apportionment.	11/7	8:00 AM	8:55 AM
Legal	Product Strategy	CL500 - HighQ + Legal Tracker 101: An Overview	This session will provide an overview of HighQ and Legal Tracker. HighQ is a cloud-based secure file sharing, team collaboration, and social networking software for enterprise customers. Legal Tracker is the corporate legal industry's most widely used software for matter, spend management, and e-billing. Learn how each platform can help reduce response times for legal service requests, streamline matter management, proactively mitigate risk, easily manage legal spend, and much more.	11/6	10:45 AM	11:40 AM
Legal	Product Strategy	CL510 - What's In Store for 2024: Legal Tracker & HighQ Strategies and Roadmaps	The Product Team will discuss the high-level goals and strategies for the future of Legal Tracker and HighQ, and how the current roadmap will achieve those goals. Come hear about Legal Tracker utilizing AI to handle invoice review, the next LTA release, and the goal to become 100% accessible. HighQ topics include cloud migration, AI integrations and modernization efforts.	11/8	10:20 AM	11:15 AM
Legal	Thought Leadership	CL600 - Intelligent Drafting Using Generative AI	A legal industry first, Microsoft and Thomson Reuters have partnered to help redefine the way legal professionals work with Copilot. This session will discuss and demo how the recent development allows generative AI to draft legal documents from content in Thomson Reuters products.	11/7	8:00 AM	8:55 AM
Legal	Thought Leadership	CL610 - Thomson Reuters and the Future of AI	Generative AI and large language models (LLM) are monopolizing the thoughts of professionals around the world. How and if they will impact the relevance of one's job is a question most have pondered, including corporate in-house legal professionals. While these technologies are undoubtedly set to make a substantial impact on the legal field, the need for the unique human skills and knowledge that corporate in-house legal professionals contribute will be imperative. Join us to learn of Thomson Reuters' vision for the use of generative AI and LLMs to positively improve the corporate in-house legal professionals workflow.	11/6	10:45 AM	11:40 AM
Legal	Thought Leadership	CL620 - Driving Change and Becoming A Data-Informed Legal Team	Join us as we meet with our client panel to discuss the value of being a data informed Legal Team and hear how their change mindset help get them there.	11/7	10:20 AM	11:15 AM
Legal	Thought Leadership	CL630 - How To Prepare For A Successful Rollout Project	What do you need to succeed with your HQ or LT rollout? We're talking about the steps to prep for your International Rollouts, Department Rollouts, and New Use Case rollouts.	11/8	8:00 AM	8:55 AM
Legal	Thought Leadership	CL640 - Legal Department Operations Index Discussion	Join Thomson Reuters leaders and customers as we discuss the results of our annual Legal Department Operations Index Report, including key priorities and initiatives.	11/6	4:55 PM	5:50 PM
Legal	Product Training	HQ100H - Ask Us Anything! (Hands-On)	If you've got the questions, we have the answers. From custom workflows to creating views, contract automation to matter management, chances are chances are we've seen it, and we've solved it. Don't miss exclusive chance to meet with experts and ask us anything.	11/7	4:40 PM	5:35 PM



Category	Type	Title	Description	Date	Start Time	End Time
Legal	Product Training	HQ120 - Unleash the Power of iSheets	From intake to reporting, iSheets are truly the brain behind HighQ; but are you using them effectively? Meet with HighQ experts to learn how to drive process automation, increase searchability and get the most out of your reporting.	11/7	11:30 AM	12:25 PM
Legal	Product Training	HQ130 - ContractCraft: Empowering Efficiency with Contract Express	Whether you are a legal professional, in-house counsel, or legal tech enthusiast, this session will equip you with the knowledge and tools to master the art of ContractCraft. Join us to unlock the potential of automated templates and revolutionize your legal practice in pursuit of unparalleled efficiency and effectiveness.	11/6	3:45 PM	4:40 PM
Legal	Product Training	HQ200 - Coding Beyond Limits: Transforming Forms and Dashboards with Simple CSS Enhancements	Have you been longing to add that extra flair to your forms and dashboards, but the thought of delving into coding makes you break out in a cold sweat? Fear not! This beginner-friendly session is made for you. Join us to discover the exciting world of CSS (Cascading Style Sheets) and how it can be used to enhance your HighQ Forms and Dashboards with style and finesse. Our experienced presenters will break down the basic concepts of CSS and show you how it can be your secret weapon without the need for extensive coding knowledge.	11/7	3:30 PM	4:25 PM
Legal	Product Training	HQ210 - Working It with Workflows	HighQ's powerful workflow tool can streamline your legal processes saving you time, all the while keeping people aware of their requests. Come ask the HighQ Experts your workflow questions while engaging in conversation with other clients about best practices, use cases, and troubleshooting.	11/6	2:10 PM	3:05 PM
Legal	Product Training	HQ220 - We Can Visualize That: Viewing HighQ Data in New Ways	Do you have a lot of data in HighQ? Wondering how to get that data translated to visualizations that you can share with others? Come see the various data visualization options in HighQ and learn the tips and tricks to make your visualizations top notch.	11/7	9:10 AM	10:05 AM
Legal	Product Training	HQ230 - Legal Front Door: Managing Your Matters in HighQ	In this session, we delve into the crucial concept of the legal front door and its significance in the ever-evolving legal landscape.	11/8	9:10 AM	10:05 AM
Legal	Product Training	HQ300 - Contract Insights with Document Intelligence	What is Document Intelligence? How does it work? What is next on the Doc Intel roadmap? Attend this session to learn about our new product and ask questions to see how it could help your organization.	11/8	8:00 AM	8:55 AM
Legal	Product Training	LT100H - Ask Us Anything! (Hands-On)	If you've got the questions, we have the answers. From custom reporting to troubleshooting timekeeper rates, invoice auditing to lifetime budgets, chances are we've seen it, and we've solved it. Don't miss this exclusive chance to meet with experts and ask us anything!	11/7	4:40 PM	5:35 PM
Legal	Product Training	LT120 - Reporting Wizardry	Fields, filters, and displays, oh my! This session is taken straight from our Reporting Workshop and is designed to ensure you follow the correct yellow brick road of reporting and get your base level reporting knowledge solid with tips, tricks and best practices from the experts. #ReportingWorkshop	11/6	3:45 PM	4:40 PM
Legal	Product Training	LT130 - The Law Firm Side of Legal Tracker	This session will demo the Law Firm side of Legal Tracker. From reposting and reporting on invoices to notifications and submitting accruals, you will get all the tips and tricks to help answer your law firm's questions.	11/7	3:30 PM	4:25 PM





Category	Type	Title	Description	Date	Start Time	End Time
Legal	Product Training	LT200 - Custom Advanced Accruals Reporting	A SYNERGY favorite! This session is designed specifically as a take-home guide for creating your very own custom Accruals Report that includes report field definitions and example reports. #ReportingWorkshop	11/7	9:10 AM	10:05 AM
Legal	Product Training	LT210 - Manage Legal Tracker and Rein in Legal Spend	Legal Tracker allows you to control costs by implementing and enforcing your billing guidelines through invoice review of fees and expenses, budgets, timekeeper rates, accruals, and various reports. This session will help you outline a plan to reign in and control your legal spend.	11/6	2:10 PM	3:05 PM
Legal	Product Training	LT220 - Reports You Should Be Running: Popular and Beneficial Reports from Clients and Consultants	Come learn as our consultants walk you through a series of reports that can help change the way you think about reporting. We will share popular reports, our personal favorite reports and eye-opening advanced reports. This session is taken straight from our #ReportingWorkshop!	11/7	8:00 AM	8:55 AM
Legal	Product Training	LT300 - The Power of PowerBI	Come learn how to analyze, visualize and professionalize your Legal Tracker data with PowerBI. This session will walk users through creating popular charts, graphs and finish with a quick review of the GC Dashboard.	11/6	1:00 PM	1:55 PM
Legal	Product Strategy	LT310 - Budgets Entwined	Every wondered about Budgets in Legal Tracker? And how Law Firm Budgets, Volume Discounts, Firm Portfolios and Rate Discounts could work together? If so, then this session is for you! Come see the big picture of how every budget feature works individually and together in Legal Tracker.	11/7	11:30 AM	12:25 PM
Legal	Product Training	LT320 - Legal Tracker Advanced: Functions and Functionality	Come learn about the latest and greatest with the Legal Tracker Advanced Functionality, followed by a discussion with the experts talking about how LTA is changing the firm selection game.	11/8	9:10 AM	10:05 AM
Tax	Thought Leadership	IDT620 - Unleash the Power Of Your Team and Data with AI	With the advancement of artificial intelligence (AI) and machine learning in the past 12 months, specifically generative AI, tax professionals have more power to get and stay ahead in their field. With the assistance of AI, tax professionals can make better decisions faster, automate processes and manual tasks, and provide more strategic value. But there are barriers to this strategic advancement. Learn how to navigate these barriers and leverage the rising capabilities of AI to mitigate risks, improve profitability, and elevate your indirect tax function.	11/6	1:00 PM	1:55 PM
Tax Information & Reporting	Product Training	TI100 - Tax Year Preparations and Testing	This session will review best practice recommendations for staying up-to-date and getting the most out of your OTIR.	11/7	9:10 AM	10:05 AM
Tax Information & Reporting	Product Training	TI110 - OTIR, Did You Know?	This session will review the most helpful features and lesser known functions in ONESOURCE Tax Information Reporting you could be using to become more productive.	11/7	10:20 AM	11:15 AM
Tax Information & Reporting	Product Training	TI120 - Things Your CSE Wished You Knew About	If you've got the questions, we have the answers. From Customer Center to creating reports and TIN matching, chances are we've seen it, and we've solved it. Don't miss exclusive chance to meet with experts and ask us anything!	11/7	4:40 PM	5:35 PM
Tax Information & Reporting	Product Strategy	TI130 - Client Panel Discussion	Join us as we meet with our client panel to discuss the value of OTIR and how it allows them to be more efficient.	11/8	9:10 AM	10:05 AM



Category	Type	Title	Description	Date	Start Time	End Time
Tax Information & Reporting	Product Training	TI140 - What to Know About Customer Center	This session will cover how to navigate through the ONESOURCE Customer Center to find information on scheduled outages, system releases, and more.	11/8	10:20 AM	11:15 AM
Tax Information & Reporting	Product Training	TI150 - Utilizing APIs within OTIR	This session will cover what is included in the ONESOURCE Tax Information Reporting API suite and the benefits provided by APIs. Attendees will gain an understanding of how to utilize these services in their tax operations.	11/6	3:35 PM	4:40 PM
Tax Information & Reporting	Product Training	TI200 - Form 1042-S & 1042 Processing and Filing	Join us for a conversation on the Form 1042-S & 1042. We'll cover the new feature for Form 1042 entry, as well as how these forms are very complex and what the IRS has changed about them.	11/7	3:30 PM	4:25 PM
Tax Information & Reporting	Product Strategy	TI500 - ONESOURCE Tax Information Reporting Product Update	This session will cover updates to the ONESOURCE Tax Information Reporting application resulting from regulatory changes for the upcoming tax season and additional product updates and enhancements.	11/6	1:00 PM	1:55 PM
Tax Information & Reporting	Thought Leadership	TI510 - Ledgible and ONESOURCE Tax Information Reporting Cryptocurrency Solution	This session will discuss how Thomson Reuters and Ledgible can help you address your cryptocurrency challenges. The IRS is currently working on final crypto regulations, but you don't have to wait until those regulations come out to understand your potential reporting requirements.	11/7	11:30 AM	12:25 PM
Tax Information & Reporting	Thought Leadership	TI600 - Information Reporting Hot Topics	This session will cover the latest developments surrounding 1099 & 1042-S compliance obligations, IRS audit efforts, as well as providing an update on the Transmitter Control Codes (TCCs) for filing electronically through the FIRE system.	11/6	10:45 AM	11:40 AM
Tax Information & Reporting	Thought Leadership	TI610 - 1099 State Reporting Regulatory Update	This session will cover the latest regulatory updates and changes to state tax information reporting rules and regulations.	11/6	2:10 PM	3:05 PM
Tax Information & Reporting	Thought Leadership	TI620 - Cryptocurrency Regulatory Update and Associated Information Withholding Reporting Implications	The IRS released the draft Digital Assets regulations in late August 2023. This session will cover key requirements focus as well as cover some of the implementation challenges related to who is broker, what information will need to be reported, and the coordination with Sections 6045A/6045B and 6050W regulations.	11/6	4:55 PM	5:50 PM
Tax Information & Reporting	Thought Leadership	TI630 - Gig/Share Industry Update	The gig/share economy continues to grow as people look to on-demand work to offset inflation. This session will provide an update on the gig/share economy as it relates to tax information reporting requirements for gig/share workers and companies.	11/7	8:00 AM	8:55 AM
Tax Information & Reporting	Thought Leadership	TI640 - Best Practices Associated with Tax Information Reporting and Withholding Operations	Review of the challenges, processes, current trends, and best practices associated with Tax Information Reporting and Withholding operating model.	11/8	8:00 AM	8:55 AM
Trust	Product Training	TT100 - Product Training: Federal and State E-file Update	This session will review the lesser-known functions and recently added functions within ONESOURCE Trust Tax that you could be using to become more productive.	11/7	8:00 AM	8:55 AM
Trust	Product Training	TT100R - Product Training: Federal and State E-file Update	This session will review the lesser-known functions and recently added functions within ONESOURCE Trust Tax that you could be using to become more productive.	11/8	8:00 AM	8:55 AM



Category	Type	Title	Description	Date	Start Time	End Time
Trust	Product Training	TT110 - K-1 Analyzer Integration with OTT	This session will review using K-1 Analyzer to manage partnership Schedule K-1s and improving efficiency with the integration into ONESOURCE Trust Tax.	11/7	8:00 AM	8:55 AM
Trust	Product Training	TT120 - OTT, Did You Know?	This session will review the lesser-known functions in ONESOURCE Trust Tax that you could be using to become more productive.	11/7	11:30 AM	12:25 PM
Trust	Product Training	TT130 - What's New with Information Reporting	This session will provide a high-level view of 1042/1099 reporting in ONESOURCE Trust Tax and will cover the latest changes that have been made to this process.	11/8	10:20 AM	11:15 AM
Trust	Product Strategy	TT500A - ONESOURCE Trust Tax Product Update Part 1: What's New for 2023!	This session will cover changes in the ONESOURCE Trust Tax application for the upcoming tax season resulting from regulatory changes, plus other product updates and enhancements. This is part 1 of a 2-part session.	11/6	1:00 PM	1:55 PM
Trust	Product Strategy	TT500B - ONESOURCE Trust Tax Product Update Part 2: What's New for 2023!	This session will cover changes in the ONESOURCE Trust Tax application for the upcoming tax season resulting from regulatory changes, plus other product updates and enhancements. This is part 2 of a 2-part session.	11/6	2:10 PM	3:05 PM
Trust	Thought Leadership	TT600 - ONESOURCE Trust Tax Kick-off: Tax and Legislative Update	This session will kick-off the ONESOURCE Trust Tax SYNERGY sessions. In this session, you will receive an important industry update from our keynote speaker.	11/6	10:45 AM	11:40 AM
Trust	Thought Leadership	TT610 - A Discussion on ESBT Return Challenges and Best Practices	This session will cover ESBT related challenges and best practices when preparing returns with ESBT.	11/6	3:45 PM	4:40 PM
Trust	Thought Leadership	TT610R - A Discussion on ESBT Return Challenges and Best Practices	This session will cover ESBT related challenges and best practices when preparing returns with ESBT.	11/7	9:10 AM	10:05 AM
Trust	Thought Leadership	TT620 - Preparing For the Unsetting of TCJA in 2025	This session will cover the sunset of tax provisions implemented with the passing of the TCJA in 2018.	11/6	3:45 PM	4:40 PM
Trust	Thought Leadership	TT620R - Preparing For the Unsetting of TCJA in 2025	This session will cover the sunset of tax provisions implemented with the passing of the TCJA in 2018.	11/7	9:10 AM	10:05 AM
Trust	Thought Leadership	TT630 - Avoiding Common Pitfalls When Dealing with ILITS	ILITs are a popular planning tool, but there are a number of pitfalls that you should avoid to maximize their effectiveness. This session will identify common pitfalls when dealing with ILITs.	11/6	4:55 PM	5:50 PM
Trust	Thought Leadership	TT630R - Avoiding Common Pitfalls When Dealing with ILITS	ILITs are a popular planning tool, but there are a number of pitfalls that you should avoid to maximize their effectiveness. This session will identify common pitfalls when dealing with ILITs.	11/7	3:30 PM	4:25 PM
Trust	Thought Leadership	TT640 - Tax Technical - GST and Estate Returns	This session will cover the regulatory and legislative updates impacting GST and Estate Tax returns.	11/6	4:55 PM	5:50 PM
Trust	Thought Leadership	TT640R - Tax Technical - GST and Estate Returns	This session will cover the regulatory and legislative updates impacting GST and Estate Tax returns.	11/7	3:30 PM	4:25 PM



Category	Type	Title	Description	Date	Start Time	End Time
Trust	Thought Leadership	TT650 - Grantor Trust Reporting: What Are Your Options?	This session will explain different grantor trusts, the tax treatment of such trusts, and the tax planning advantages of grantor trusts. This session will help trust and tax professionals understand this somewhat confusing topic.	11/7	10:20 AM	11:15 AM
Trust	Thought Leadership	TT650R - Grantor Trust Reporting: What are your Options?	This session will explain different grantor trusts, the tax treatment of such trusts, and the tax planning advantages of grantor trusts. This session will help trust and tax professionals understand this somewhat confusing topic.	11/7	4:40 PM	5:35 PM
Trust	Thought Leadership	TT660 - Charitable Return Update	This session will cover the latest regulatory updates impacting charitable returns and identify potential issues that a tax preparer should be aware of.	11/7	10:20 AM	11:15 AM
Trust	Thought Leadership	TT670 - Disposition of Partnership Interests: Abandonment, Selling and Redemption	This session will cover the various transaction and fact patterns involved with a disposition of a partnership interest and will include a discussion of potential issues that a tax preparer should be aware of.	11/7	11:30 AM	12:25 PM
Trust	Thought Leadership	TT670R - Disposition of Partnership Interests: Abandonment, Selling and Redemption	This session will cover the various transaction and fact patterns involved with a disposition of a partnership interest and will include a discussion of potential issues that a tax preparer should be aware of.	11/8	8:00 AM	8:55 AM
Trust	Thought Leadership	TT680 - Know Your Alternative Investments	Alternatives aren't just for large institutional investors. This session will discuss the reporting requirements for various investments held (passive, at-risk basis, section 199A, etc.), proposed changes in tax legislation (if any), basis tracking, valuation issues, and the potential for unrelated business taxable income (UBTI). We will also discuss the challenges encountered, including third-party prepared returns, rental real estate (passive losses and at-risk basis), debt-financed items creating UBIT for charitable donations and IRAs, additional time requirements, skill sets needed, and more.	11/7	4:40 PM	5:35 PM
Trust	Thought Leadership	TT690 - Trust Situs: Challenges Due to Changing Locations of Trustees and Beneficiaries	Did you work from home, change state residency, or move your trustee location? This session will cover the various trust situs rules, as well as what happens if beneficiaries or trustees move, and how to deal with state authorities who want to keep a share of the tax revenue.	11/8	9:10 AM	10:05 AM
Trust	Thought Leadership	TT700 - Secure Act, Secure 2.0 and Other IRA Challenges	This session covers recent updates to the SECURE ("Setting Every Community Up for Retirement Enhancement") Act and how these changes affect IRAs, particularly IRAs where trust is a named beneficiary. The first SECURE bill passed in 2019, but "SECURE 2.0" bill has passed in the House and is moving through the Senate.	11/8	9:10 AM	10:05 AM
Trust	Thought Leadership	TT710 - NRA and FATCA Withholding: Latest Regulatory Updates	This session will cover the latest regulatory updates to NRA/FATCA and associated withholding for Form 1042-S, with an emphasis on reporting for trust companies.	11/8	10:20 AM	11:15 AM