Deloitte’s myInsight portal provides a complete ecosystem for tax allowing true collaboration across all tax functions (planning, provision, compliance and post-compliance). It facilitates:

- Standardizing document management methodologies
- Standardizing processes
- Providing insight to global tax obligations
- Providing users with access to required information when and where they need it
- Providing consistent and central user interface for disparate systems and office locations
- Facilitating data management, reporting and analytics

**myInsight**

**An ecosystem for Tax**

Deloitte’s myInsight portal provides a complete ecosystem for tax allowing true collaboration across all tax functions (planning, provision, compliance and post-compliance). It facilitates:

- Standardizing document management methodologies
- Standardizing processes
- Providing insight to global tax obligations
- Providing users with access to required information when and where they need it
- Providing consistent and central user interface for disparate systems and office locations
- Facilitating data management, reporting and analytics

**Changing expectations**

CFOs have new expectations for tax executives. The myInsight portal enables tax departments to exceed those expectations.

**Traditional role**

- **Planning**
  - Reduce global tax burden and enhance cash flow

- **Reporting**
  - Comply with reporting obligations

- **Managing**
  - Operate within an appropriate risk framework

**Emerging additional expectations**

- **Enhancing the tax function for greater impact**
  - Connected to the enterprise via technology
  - Optimized tax operating model
  - Sustainability and efficiency

- **Strategic business partnering across the organization**
  - Eliminate silos
  - Connect beyond the tax department
  - Improve global processes

**Transform ... for greater impact**

**Benefits**

<table>
<thead>
<tr>
<th>Fewer silos</th>
<th>Risk mitigation</th>
<th>Faster access to one version of the truth</th>
<th>Standardized processes</th>
<th>Efficiency gains</th>
<th>Improved planning</th>
<th>Cost savings</th>
</tr>
</thead>
</table>
| • Connected tax processes connected corporate functions  
  • Common user interface, workflow, and document management platform |
| • Transparency and accountability supported by global calendar  
  • Access and reporting to key tax department filings, documents, and data |
| • Effective communication through integrated tools and processes  
  • Searchable through key tags and key word search capability |
| • Documented and controlled workflows supporting efficient processes throughout the tax department |
| • Increased efficiency and productivity  
  • Advanced search, bulk assignments, and drag-and-drop capability |
| • Designated idea repository and tax data analytics platform  
  • Ability to prioritize and track planning ideas and future projects |
| • Corporate enterprise platform, reducing inefficient methods of information sharing  
  • Facilitates self-service, lower support costs, and consolidation of disparate platforms |
Key functionality

Key features

- Designed to allow tax department to support, configure, and administer the portal without reliance on IT or Deloitte
- Robust integrated workflow engine specifically designed and built to meet unique tax process needs
- Integrated web forms engine for data collection with a robust rules engine that can trigger workflows based on specific business rules
- Integrated business intelligence tool for creating self-service dashboards, reports and analytics
- Integrated legal entity management
- Integrated survey tool that can be leveraged by tax and finance for data collection such as questionnaires
- Automatic capture and reporting of internal or external controls based on client specified Controls Catalog
- Full support for client defined taxonomy, metadata and custom data elements
- Automated tagging of documents based on client defined taxonomy
- Ability to integrate with client systems and data sources for advanced data analytics
- Integrated data wrangling functionality facilitating automation of global data gathering, enrichment and validation
- Offered as a cloud-based Software as a Service model