



## myInsight Client Edition

### An ecosystem for Tax

Deloitte's myInsight tax portal provides a complete ecosystem for tax allowing true collaboration across all tax functions (planning, provision, compliance and post-compliance). myInsight client edition assists users with:

- 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
- Eliminating silos to work collaboratively and efficiently

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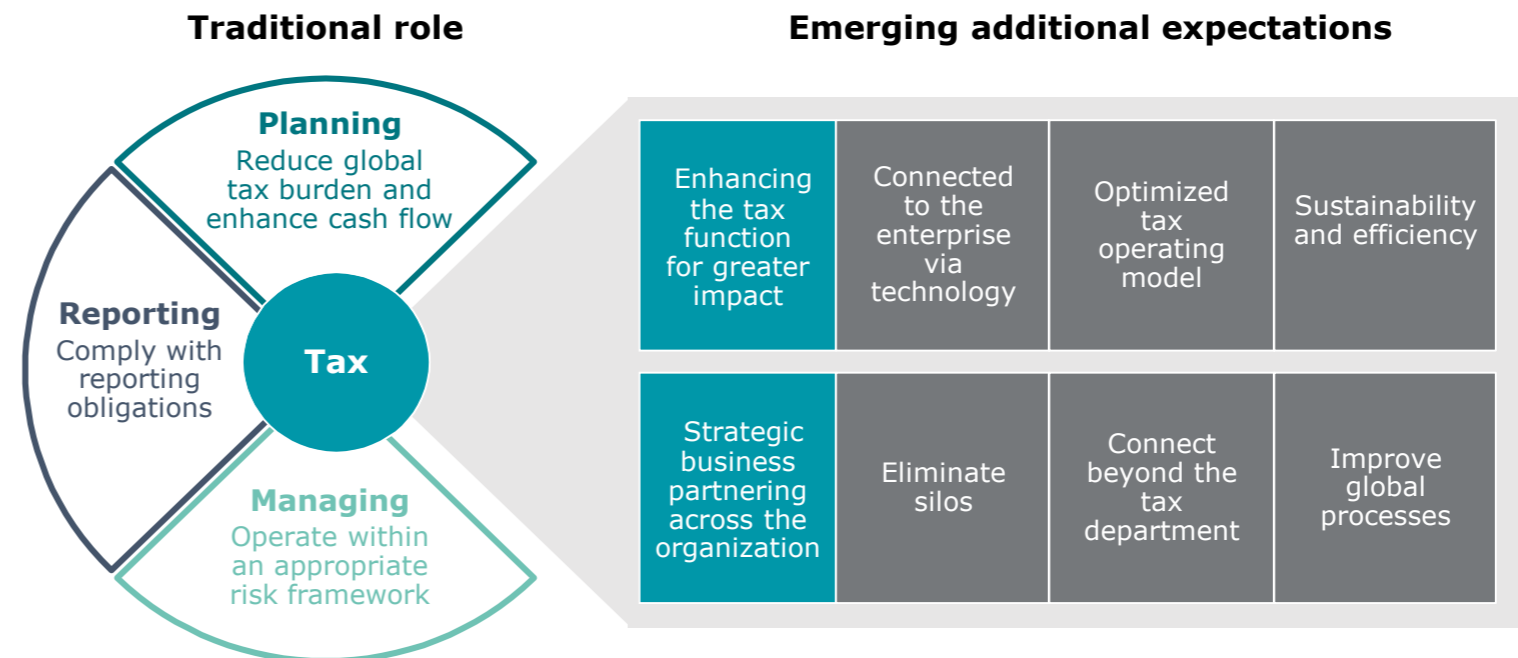


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## Changing expectations

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

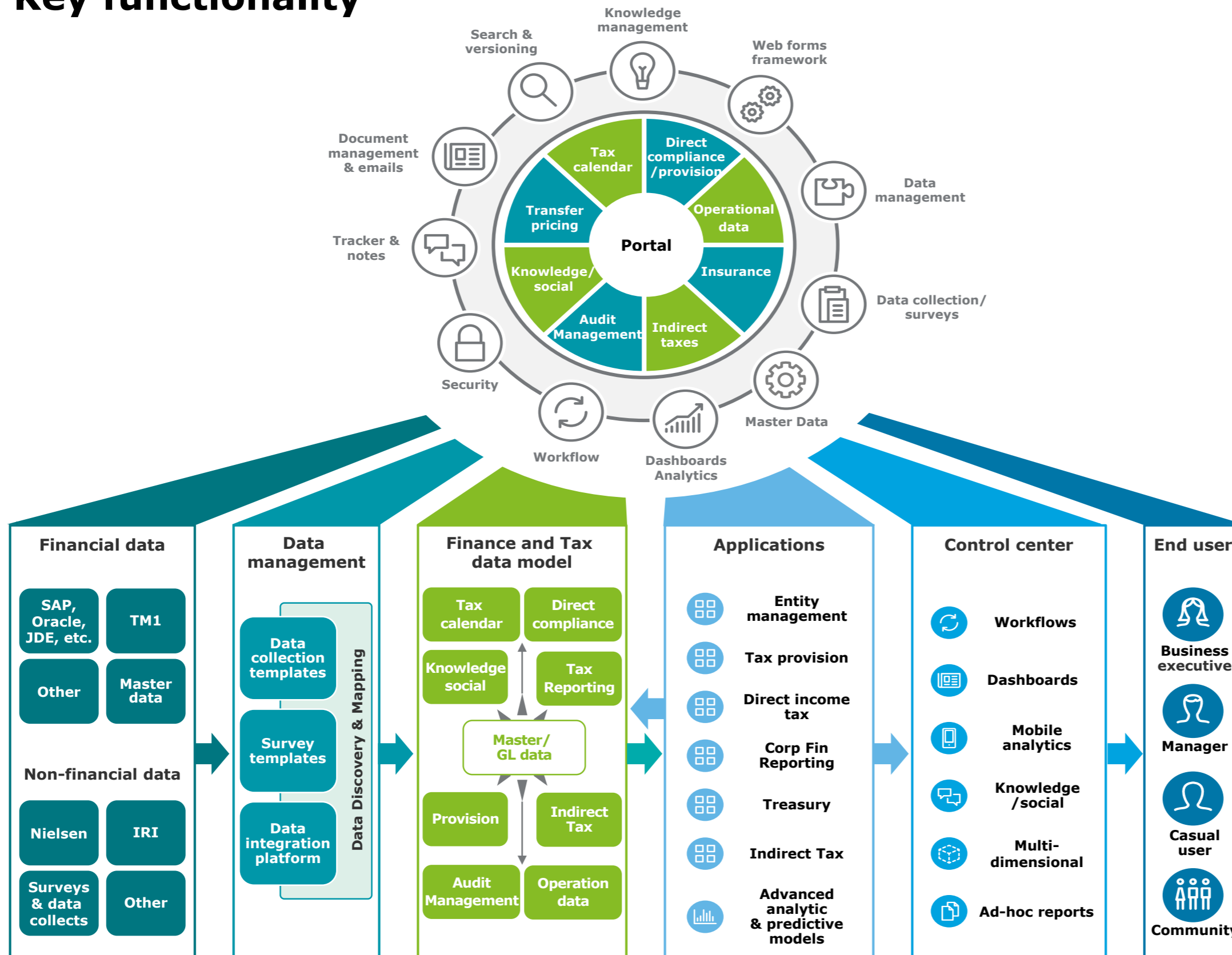


## Transform ... for greater impact

### Benefits

<b>Fewer silos</b>	<ul style="list-style-type: none"> <li>• Connected tax processes connected corporate functions</li> <li>• Common user interface, workflow, and document management platform</li> </ul>
<b>Risk mitigation</b>	<ul style="list-style-type: none"> <li>• Transparency and accountability supported by global calendar</li> <li>• Access and reporting to key tax department filings, documents, and data</li> </ul>
<b>Faster access to one version of the truth</b>	<ul style="list-style-type: none"> <li>• Effective communication through integrated tools and processes</li> <li>• Searchable through key tags and key word search capability</li> </ul>
<b>Standardized processes</b>	<ul style="list-style-type: none"> <li>• Documented and controlled workflows supporting efficient processes throughout the tax department</li> </ul>
<b>Efficiency gains</b>	<ul style="list-style-type: none"> <li>• Increased efficiency and productivity</li> <li>• Advanced search, bulk assignments, and drag-and-drop capability</li> </ul>
<b>Improved planning</b>	<ul style="list-style-type: none"> <li>• Designated idea repository and tax data analytics platform</li> <li>• Ability to prioritize and track planning ideas and future projects</li> </ul>
<b>Cost savings</b>	<ul style="list-style-type: none"> <li>• Corporate enterprise platform, reducing inefficient methods of information sharing</li> <li>• Facilitates self-service, lower support costs, and consolidation of disparate platforms</li> </ul>

## Key functionality



## Key features

- Designed to allow tax department to support, configure and administer majority of the Portal without reliance on IT
- Robust integrated workflow engine specifically designed and built to meet unique tax process needs
- Integrated 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 Control Catalogue
- 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
- Support for both on-premises and cloud-based hosting model



## Common user interface

The dashboard features a navigation bar with 'Home', 'Tasks', 'Tracker', 'Documents', 'Search', 'Workflows', 'Forms', 'Reports', 'Survey', 'Entities', and 'Admin'. The main content area is divided into four sections: 'Status Overview' with a 'Tracker Item Status' filter and counts for 'All Open Items', 'Completed', 'Due Later', 'Due Soon', 'No Due Date', and 'Overdue'; 'Useful Links' with a news snippet about FIRS penalties and links for 'World Tax Advisor', 'Global Tax Alerts', 'Debrief Webcast', 'State Tax Matters', 'The Weather Channel', and 'COMPANY Intranet'; 'Dashboards' with tiles for 'Status Report', 'Provision Analytics', 'Worldwide KPIs', 'Compliance Analytics', 'Compliance Memo', and 'Tax Reform Analytics'; and 'Tax Apps' with tiles for 'K-1 Xtract', 'Compliance Mgmt', 'OTP', 'VAT SMART', 'Data Mgmt Tool', and 'Controls Management'.

## Document management

The interface shows a list of documents on the left and a table of details on the right. The table has columns: Document Name, Checked Out To, Document Type, Specialized Security, Module, Location, Year, Master Obligation, Binder Section, and Entity ID.

Document Name	Checked Out To	Document Type	Specialized Security	Module	Location	Year	Master Obligation	Binder Section	Entity ID
SAP BW GL.xlsx		Excel		Direct Compliance	US	2018	1120 US Corporate Income Tax...	Account Recs	0101_Direct_Complan
Company form 1120.pdf		PDF		Direct Compliance	US	2018	1120 US Corporate Income Tax...	Federal 1120	0101_Direct_Complan
Workpapers.xlsx		Excel		Direct Compliance	US	2018	1120 US Corporate Income Tax...	Compliance	0101_Direct_Complan
Trial Balance.xlsx		Excel		Direct Compliance	US	2018	1120 US Corporate Income Tax...	BS Flux	0101_Direct_Complan

## Workflow and due date tracking

The interface shows a list of tracker items on the left and a detailed view of a workflow on the right. The detailed view includes a 'Tracker Item Name', 'Entity ID', and 'Entity Name'. It also features a table of workflow steps and a table of task assignments.

Workflow Name	Start Date	End Date	Owner	Workflow Status
Statement of Info Workflow	02-Mar-2017		Ankush Bhatia	Sanitize Data Collected

Task Name	Due Date	Role	Assigned To	Task Status	Control ID	Task Completion Date
Gather Data	01-Nov-2021	Preparer	Ankush Bhatia	Complete		30-Jan-2018
Sanitize Data Collected	11-Nov-2021	Preparer	Ankush Bhatia	Not Started		
Prepare Workpaper	21-Nov-2021	Preparer	Ankush Bhatia	Not Started		
Review Workpaper	26-Nov-2021	Reviewer	Niketu Bhatt	Not Started		
Sign off	01-Dec-2021	Signer	Niketu Bhatt	Not Started		

## Reporting on compliance status

The interface displays a 'Questionnaire' with a table of questions and responses. A map shows 'Countries that responded' with regions labeled: NOORD-AMERIKA, EUROPA, ZUID-AMERIKA, and ANTARCTICA. A bar chart shows 'Responses per year' for 2012, 2011, 2010, and 2009.