

# Data Connection

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DENISE GODBEE

SENIOR TRAINER



# What & When?

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## What is Data Connection?

- Data Connection is a robust tool that allows for importing and exporting of data from your locators.
- Can be updated in the locator without doing data entry in the locator itself.
- Can be used to verify the data in a locator to compare to your workpaper or other expected results

## When should I use Data Connection?

- When you want to automate processes and remove data entry requirements
- Used with API to improve efficiencies or with webservice to execute the data connection call instead of manually importing
- Can potentially be used when no other import capability is available

# Import Templates

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You can create an import template by Exporting the data connection file from a locator that is already populated to understand the format and required fields, or you can manually create one.

- Fields available for import change by year and also by entity type
- Form and Field names also vary per return
- Development may also add new fields each year

Import templates can be edited in Excel or Notepad

- Import templates that are not in the correct format will fail during import. Development may need to review the files.

# Data Connection Files

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If creating and not exporting...be sure to save as an CSV file not an XLS

Header Record is Mandatory and requires

- Locator Number
- Entity Name
- Data connection replacement flag

All items must have quotations in the header and a comma to separate the 6 available fields

IE. "000CNZ", "ABC Company", "0", "0", "0", "M" (zeros will put zero as the value use "" to leave blank)

Optional fields are

- Entity name line 2
- Client code
- And file source code

# Import Replacement Flags

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M – **Recommended** flat for import – keeps all existing data in the return as is and only imports data that has been replaced in the file

R – Will delete all existing data in the return first then import data in the file

U – This will align group data for forms included in the file for import and return information existing in the return before import

H – Hybrid of U and M flags (Go Wolverine's!)

“000CNZ”, “ABC Company”, “”, “”, “”, “”, “R”

# Data Connection Files

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## Data Record Requirements

- Quotations are optional in the data records but required in the Header
- Each row must include commas to separate each requirement
  - Form name
  - Copy number
  - Group number
  - Subgroup number
  - Field name
  - Value
  - Organizer indicator (required or import will fail)
- Each line must indicate 0 for Organizer
  - General Information,0,0,0,IN CARE OF NAME,George Boo,0

# Data Connection File Set

The screenshot displays the GoSystem Tax RS website interface. At the top left, the logo 'GOSYSTEM TAX RS' is visible. The top right corner features the Thomson Reuters logo and navigation links for 'Options', 'Help', and 'Log Off'. A main navigation bar includes 'Home', 'Returns', 'Returns Processing', 'Admin', 'Reports', 'e-Form RS', and 'K1 Analyzer'. A left-hand sidebar lists 'Help Resources', 'Customer Center', 'State Availability', 'Supported Environments', 'Case Studies', and 'About GoSystem Tax RS'. The main content area has a filter bar with tabs for 'ALL', 'KNOWN ISSUE', 'GUIDES', 'FAQS', 'HOW TO', and 'UPDATES AND RELEASE N'. Below this, a search bar contains the text 'Data Connection File Set'. The search results are divided into two columns: 'ALERTS' and 'Search Results'. The 'ALERTS' column lists several updates, including 'Customer Center Updates for GoSystem Tax', '990/1041/1065/1120: E-Filing for Business Returns - IRS Shutdown to Prepare for Upcoming Filing Season', '1120: Suppressing Rollover in Preseason at Thomson Reuters will mark a return as "Final"', and '1040: IRS E-File Alert - 1040 Modernized e-File (1040 MeF) Production Shutdown/Cut Over Schedule'. The 'Search Results' column lists '1120: 2019 Data Connection Specifications and File Set Documentation - January 19, 2021', '1065: 2019 Data Connection Specifications and File Set Documentation - November 17, 2020', 'Customer Center Updates for GoSystem Tax News\_Alerts - January 6, 2021', and '1065: 2020 Data Connection Specifications and File Set Documentation - January 19, 2021'. The last search result is highlighted in yellow.

**GOSYSTEM TAX RS** THOMSON REUTERS

Home Returns Returns Processing Admin Reports e-Form RS K1 Analyzer Options **Help** Log Off

Help Resources  
**Customer Center**  
State Availability  
Supported Environments  
▶ Case Studies  
About GoSystem Tax RS

**ALL** KNOWN ISSUE GUIDES FAQS HOW TO UPDATES AND RELEASE N

**Data Connection File Set**

**ALERTS**

- Customer Center Updates for GoSystem Tax
- 990/1041/1065/1120: E-Filing for Business Returns - IRS Shutdown to Prepare for Upcoming Filing Season
- 1120: Suppressing Rollover in Preseason at Thomson Reuters will mark a return as "Final"
- 1040: IRS E-File Alert - 1040 Modernized e-File (1040 MeF) Production Shutdown/Cut Over Schedule

**Search Results**

- 1120: 2019 Data Connection Specifications and File Set** Documentation - January 19, 2021
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