ONESOURCE guide to support

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Customer Service and Product Support follow these guidelines to maximize the value of your support experience by using best practices that expedite resolutions.

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If after reasonable efforts, your internal support organization can't find a solution, you can contact Support. To help you, we may need reasonable and necessary access to repository files, log files, and/or database extracts to effectively troubleshoot a resolution.

Note: Any mention of the term *business hour* refers to an hour that takes place during the support hours for your Thomson Reuters Support site. And the term *business day* means Monday through Friday, excluding holidays. Each product's landing page lists the Support hours and holidays at the bottom of the page.

- Australia
- Brazil
- United Kingdom
- United States

You create cases for Product Support for tracking the status of your question or problem. If you use the Case Management Dashboard, sign in to create your case. For critical issues that arise outside business hours, assign a high priority to your case. Product Support receives alerts for these critical matters.

Tip: Keep this in mind! The more detail you give, the faster your question or problem gets resolved. Details to include:

- Specific steps to reproduce the problem.
- Screenshots, log files, error reports, etc.
- Recent changes to your environment.
- Any account, database, or partner IDs.

These products have premium support available per the terms of the customer contract:

- Global Trade Management (LATAM)
- Global Trade Management powered by Integration Point
- ONESOURCE Indirect Tax (Determination, not Compliance)

Note: For critical or high priority cases entered outside of business hours, a notification is sent to Product Support.

In the event of a system outage, Thomson Reuters delivers the status and any related updates using the system status page. To receive these updates by email or text, subscribe to the service on the system status page.

For standard maintenance, you receive 2 calendar weeks before the maintenance date and 48-hour notice for emergency maintenance situations.

For incidents related to your local, company-specific IT configurations, Product Support gives limited assistance due to the unique, technical knowledge needed to support a company's network. In such cases, Product Support may request you involve your IT administrator.

Note: The absence of a requested IT or business representative from the customer may negatively impact resolution times and may void the service-level agreement (SLA) guarantees.

Collaboration between Thomson Reuters Product Support professionals, you as our customer, and your IT support is important in delivering effective and efficient solutions to you. We recommend these practices for a successful support arrangement.

- Maintain continuity of incident ownership. We recommend 1 individual from your IT provider works to resolve the incident from start to finish avoiding delays in resolution time. We also recommend 1 individual from your firm stays involved from start to finish.
- Remain current on IT training and certifications. We recommend your IT provider works to ensure their resource pool have current certifications and training.

Product Support works hard to help resolve any issues that arise for you as efficiently as possible.

Note: You'll want to ensure your environment follows the latest system requirements and the product's use follows its intended design to qualify for coverage under Product Support SLAs.

- **Initial go-live and upgrade policy.** We ask you to involve Thomson Reuters Professional Services or Product Support when planning to go-live or upgrade your system. This ensures the associated restoral time SLA stays in affect. Note that if SLAs don't stay in effect, Product Support continues with our best efforts to resolve the incident.

  - **Testing.** As part of troubleshooting a production issue that happens immediately after an upgrade or other significant change to production, we ask you to document occurrences of the issues in a test environment before the upgrade.

- **Authorized support contacts.** These are your employees or contractors you designate as your firm representative for submitting cases and interacting with Product Support. If you outsource production support to 3rd parties, you want to ensure such 3rd party delegates receive training and that they obtain an account with Product Support as an authorized contact. We recommend authorized contacts stay current with their product use and knowledge.
- **IT resources.** Thomson Reuters may request an authorized contact involve 1 or more IT administrators or business resources to help with the incident.
- **Restoral time.** Restoral time SLAs objective is to return your product environment to working order within the allowed time limit. If a transition to Product Support didn't occur, the restoral time SLA won't apply. Note that if SLAs don't stay in effect, Product Support continues with our best efforts to resolve the incident.

Table 1: Support incident priority levels and response/restoral SLAs

Priority	Definition	Initial response SLA	Restoral time SLA	Resolution commitment
P1 - critical - level I	Production system is inoperative and business operations critically impacted. Can't work.	Premium 1 hour Standard 1 bus hour	Premium 8 hours Standard 2 bus days	Find alternative or other temporary solution to restore operation. Apply permanent fix to next scheduled release. Possible product updates. Customer assigns an authorized contact to partner with Support in resolving the issue. Both parties to be available during standard business hours.
P2 - high - level II	Production system is adversely affected or is inoperative. Productivity is compromised; able to work but severely limited.	Premium 4 hours Standard 4 bus hours	Premium 48 hours Standard 5 bus days	Find alternative or other temporary solution to restore operation. Apply permanent fix to next scheduled release. Possible product updates. Customer assigns an authorized contact to partner with Product Support in resolving the issue.
P3 - medium - level III	Production or development system has a non-critical problem or defect and/or questions have arisen about product use. Products usable but non-critical features can't function.	1 business day	N/A	Find alternative or other temporary solution to restore operation. Apply permanent fix to next scheduled release. Possible product updates.

Priority	Definition	Initial response SLA	Restoral time SLA	Resolution commitment
P4 - low - level IV	Minimal system impact; includes feature requests and other non-critical problems. May also be a new feature request.	7 business days	N/A	Find alternative or other temporary solution to restore operation. Apply permanent fix to next scheduled release. Possible product updates. Enhancement requests given to Thomson Reuters Product Management for consideration in future scheduled releases.

- **Custom integrations and other custom code.** Our testing environments don't include all customizations, whether built by you, a 3rd party, or by Thomson Reuters Professional Services. Standard contracts don't cover the maintenance of customizations, as such Thomson Reuters isn't responsible for customizations impacted by an update/upgrade. Contact your account manager who can assist you in getting the customization working again. This work is billable by time and materials.
- **Customer on-premise infrastructure.** Product Support helps you troubleshoot complex issues in your product and on-premise IT infrastructure. In cases where the IT infrastructure is the root cause, we may recommend an environment review with Thomson Reuters Professional Services or a 3rd party IT consulting company. This includes IT infrastructure and environments not meeting minimum system requirements.
- **Product releases.** We continuously enhance our products to give you new functionality and to stay current with necessary guidelines. Following industry standards, older versions of the product and associated platforms are formally no longer supported.
- **Product's intended use.** Utilization of the product in accordance with its intended design and use must align to qualify for coverage under SLAs.

Important: This article is the source of truth for guidelines in contacting and working with Support.

Thomson Reuters holidays

Table 2: 2023 US holidays

Holiday	Day of the week	Date
New Year's Day	Monday	January 2
Martin Luther King Day	Monday	January 16
President's Day	Monday	February 20
Mental Health Day	Friday	May 12
Memorial Day	Monday	May 29
Juneteenth	Monday	June 19
Independence Day	Tuesday	July 4

Holiday	Day of the week	Date
Labor Day	Monday	September 5
Mental Health Day	Monday	October 23
Thanksgiving Day	Thursday	November 23
Day after Thanksgiving	Friday	November 24
Christmas Day	Monday	December 25