



# ONESOURCE Compliance Hub (OCH) User Guide

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Lucas Machado

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# Thomson Reuters ONESOURCE

## What is Thomson Reuters ONESOURCE?

Thomson Reuters ONESOURCE is a state-of-the-art tax platform that provides everything corporate tax departments and IT personnel need to manage indirect and direct tax calculations, reporting, and compliance.

Used by companies worldwide, ONESOURCE operates at the intersection of commerce and trade, allowing companies to conduct business without being bogged down by technical drama and busy work. In one of its many functions, the ONESOURCE platform integrates easily with existing enterprise, resource, and planning (ERP) systems and performs tax calculations automatically, enabling tax teams to focus on activities that offer more strategic and financial value to the enterprise.

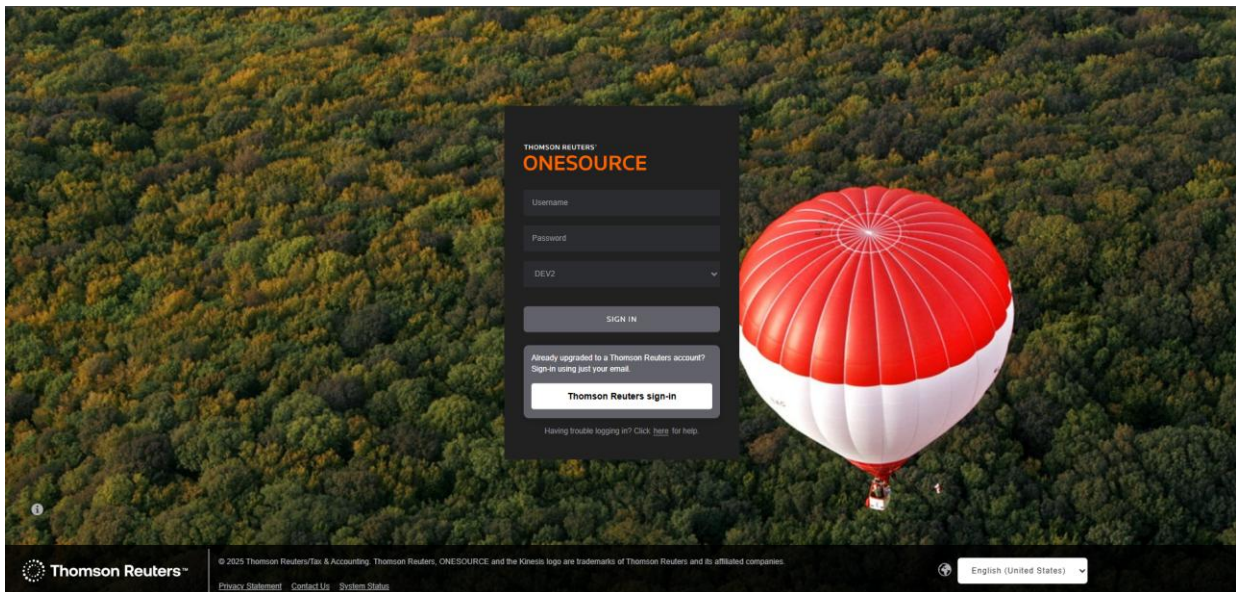


Figure 1: ONESOURCE login screen

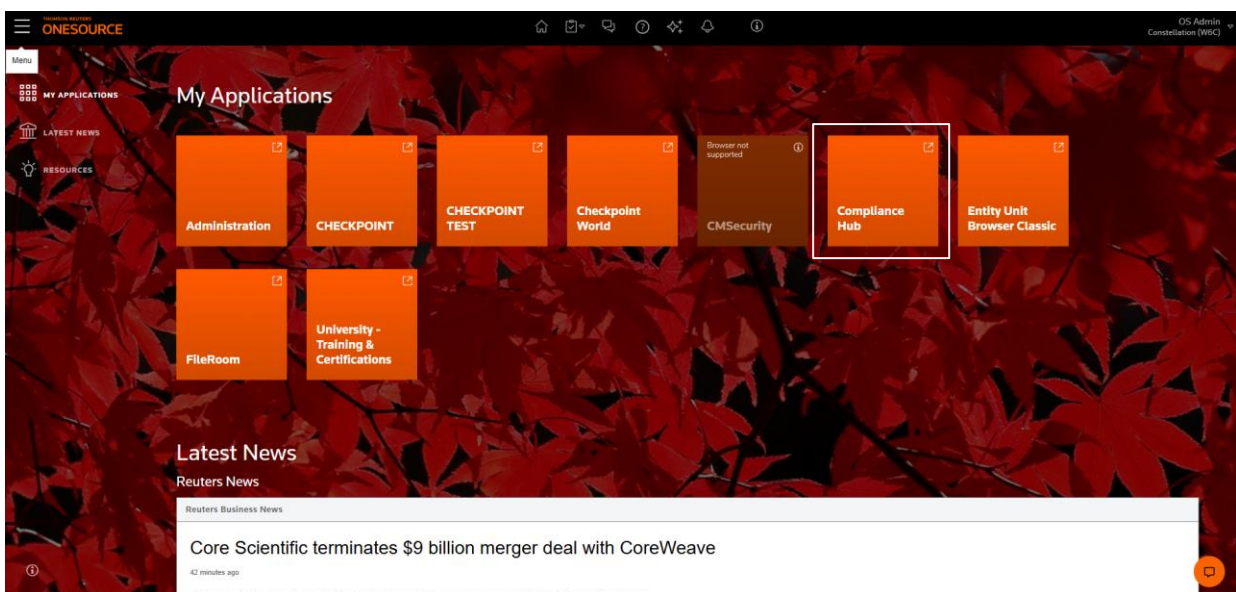


Figure 2: ONESOURCE home page

## What is ONESOURCE Compliance Hub?

ONESOURCE Compliance Hub (OCH) is a comprehensive tax and trade regulatory content and analysis platform that redefines how businesses track, consume and work with regulatory information.

ONESOURCE Compliance Hub (OCH) brings together AI-assisted discovery and SME-curated regulatory content to help teams find answers faster, trace sources confidently, and stay audit-ready.

Currently, OCH provides consolidated e-invoicing and CTC (Continuous Transaction Controls) content, country profiles, and deadline tracking, designed for quick navigation and clear provenance.

Later, OCH will expand to additional Corporate Tax & Trade (CT&T) domains in phased releases aligned with the product roadmap (e.g., notifications, workflow, partner APIs).

Built for your roles:

- Tax & Finance: see upcoming obligations and changes, filter by country/transaction type, and export actions for planning.
- AP / AR: Check CTC readiness, understand invoice controls, and follow implementation steps with linked guidance.
- IT: leverage SSO and tenant-level access; consult technical notes for data flows and environment setup.

AI & Research: Integrated CoCounsel surfaces relevant materials with citations. SMEs review and validate key guidance to ensure accuracy.

Learn by doing: Key pages include short walkthroughs and screenshots to help you complete common tasks (e.g., building a dashboard, tracking deadlines, or reviewing a country profile).

## ONESOURCE Administration Overview

The ONESOURCE Platform screen is the landing page for all ONESOURCE applications. From this screen, administrators can perform system setup tasks and manage users and groups through the Administration interface.

### Administration

The ONESOURCE Platform is compatible with various browsers and devices, enabling you to switch between different applications in your ONESOURCE suite. This lets you view data across multiple ONESOURCE applications using several browser windows. Plus, it offers the ability to track your recent work across all ONESOURCE applications and create tasks as you progress through your tax processes.

### Administration platform tile

The Administration application provides a centralized, user-friendly way to manage ONESOURCE applications. It streamlines administrative tasks by unifying product information management across all ONESOURCE solutions.

This help system is designed for administrators responsible for controlling company access and configuring security policies. Administrator permissions are required to access ONESOURCE Administration and perform these tasks.

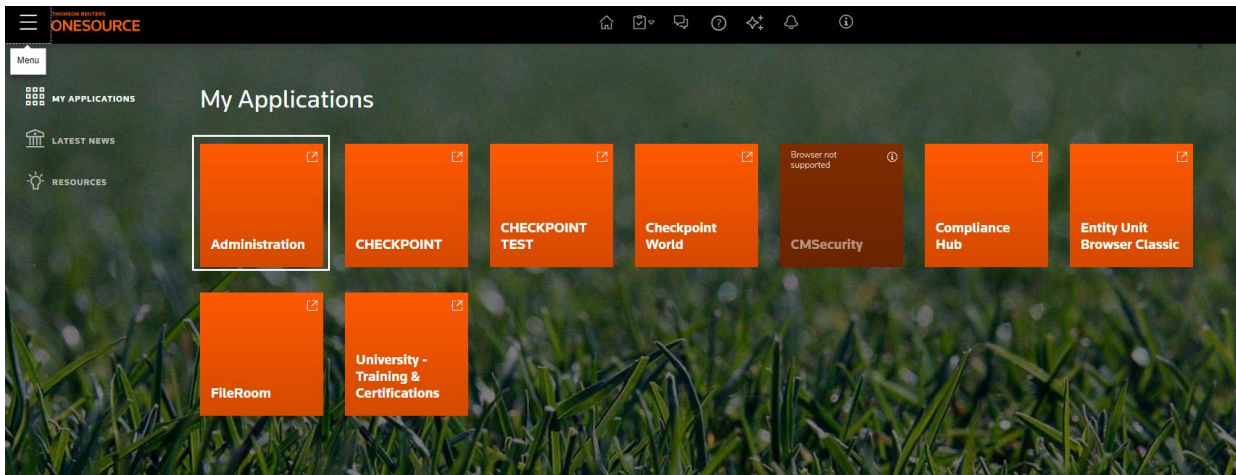


Figure 2: Administration Tile

### Administration tasks

The Administration application is organized into five functional areas for completing tasks. The screens available to you depend on your assigned permissions.

- **Company Info** - Access Accounts, Client Manager, Entities, Groups, Locations, and Users.
- **Reference Data** - Gives general-purpose data elements about common items that are used and accessed by multiple ONESOURCE applications and tools. There are currently 5 types of Reference Data: Authorities, Currencies, Domains, Financial Hierarchy, and Jurisdictions.
- **Notifications** - Shows the status of imports and import messages in the Notification Queue.
- **Reporting** - Reports screen to view, run, and print reports; change layout, use filters and more.
- **Setup** - Various system setup screens: Password Policy, Account Lockout Policy, Single Sign-On Authentication, Multi-factor Authentication, IP Authorization, and Support Access.

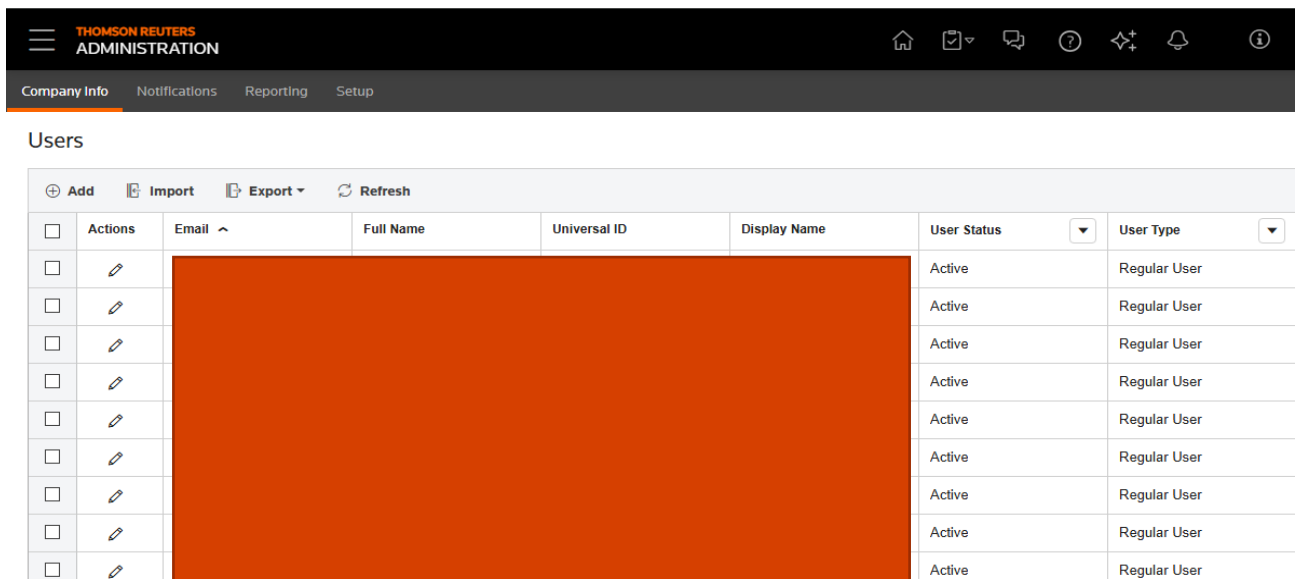


Figure 3: Admin tasks screen

## Administrator permissions for user administration

The options you select for administrators determine the type of administrator they are. These options determine the type of tasks the administrator can perform in their system.

There are 6 sections of permission:

- Full Access
- Company Info
- Assignments
- Product Permissions
- Reference Data
- Setup

Follow these steps to assign permissions.

- Sign in to ONESOURCE, then select Administration.
- On the Users screen, search for the name to assign permissions to.
- Select Edit.
- Select Product Permissions.
- To assign administrator role permissions, select Administration, then mark Full Access (select all).

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**Note:** Full Access administrators can assign all permissions for any ONESOURCE applications covered by their licenses.

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- In the **Company Info** section, select all applicable permissions: **View, Add, Edit, or Delete**.
- In the **Assignments** and **Product Permissions** sections, choose either **Edit (Limited)** or **Edit (All)**:
- **Edit (Limited):** Administrators can view and manage only the clients and products assigned to their own profile.
- **Edit (All):** Administrators can view and manage all clients and products, regardless of the assignments in their profile.

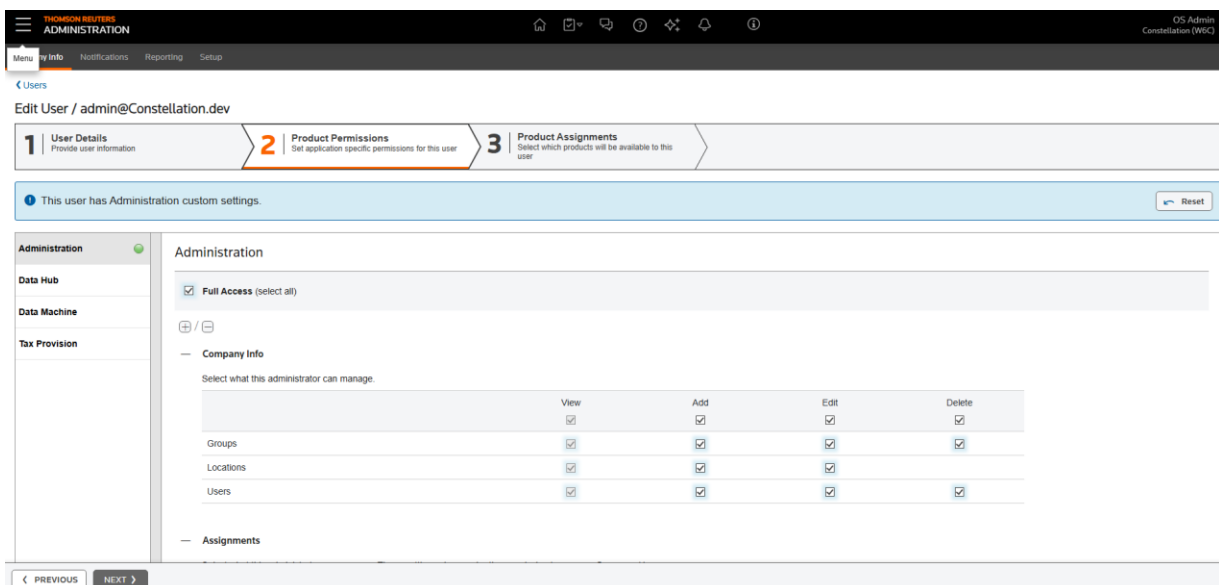


Figure 4: Product permission screen

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**Note:** These settings require at least **View Users** or **View Group** permissions.

---

- In the **Reference Data** and **Setup** section, select all applicable **View** or **Edit** permissions.
- Click **Next**.
- On the **Product Assignments** screen, select all products the user should be able to view and use.
- Click **Done** to save your changes.

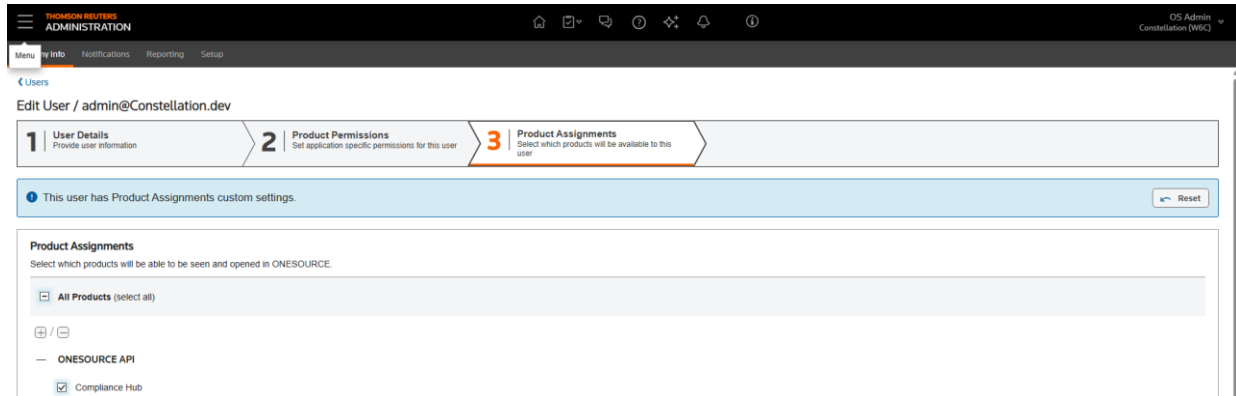


Figure 5: Product Assignment

## Administrator types

Administrators manage user access and security across ONESOURCE applications. They can:

- Set up other administrators
- Assign permissions (**View, Add, Edit, Delete**) to users
- Manage application-level permissions
- Establish security policies for users and company accounts

## Administrator Levels

### Full Access:

- Grants permissions for **every licensed ONESOURCE application**.

### Full Access (Product-Specific):

- Grants **full permissions for selected applications only**.
- Requires **Edit (Limited)** for product-specific control.

### Product-Specific:

- Grants **specific permissions for selected applications only**.

## Managing Product Assignments

To use and manage the **Product Assignments** section, you must have either:

- Full Access administrator permissions, or
- Edit (Limited) administrator permissions.

### Steps to Assign Permissions

- Sign in to **ONESOURCE**, then select **Administration**.
- On the **Users** screen, search for the user you want to update.
- Select **Edit**, then go to **Product Permissions**.

### Full access administrator

Administrators with **Full Access** can assign all permissions for any ONESOURCE applications covered by their licenses.

#### To grant full Access:

1. Select the Full Access (Select All) checkbox.
- When selected, all other options are automatically enabled except Edit (Limited).
  - The user now has Full Access, including administrator-level permissions.

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**Note:** If the account uses **Client Manager**, administrators with **Edit (All)** permissions can view and manage all clients, regardless of the client's assignments in their profile.

---

1. Click **Next**.
2. On the **Product Assignments** screen, select all products the user should be able to view and use.
3. Click **Done** to save your changes.

### Full access (product-specific) administrator

A **Product-Specific Full Access** administrator can manage all user permissions for selected ONESOURCE applications.

When you select **Full Access** for a specific application, you enable the administrator to configure every permission for that application.

This designation grants the user **Full Access administrator rights** for that application only.

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**Note:** These settings require at least **View Users** or **View Group** permissions.

---

1. In the **Product Permissions** section, mark **Edit (All)** next to the specific application the user should have access to.
2. In the **Company Info**, **Assignments**, **Reference Data**, and **Setup** sections, select the specific permissions required for this user.
3. Click **Next**.
4. On the **Product Assignments** screen, select all products the user should be able to view and use.
5. Click **Done** to save your changes.

### Product-specific administrator

A **Product-Specific administrator** can manage user permission for the ONESOURCE products they are assigned to.

- Selecting **Edit (Limited)** for an application allows the administrator to configure permissions for that specific application only.
- This designation grants the user administrator rights for the selected application and its associated permissions.

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**Note:** *These settings require at least View Users or View Group permissions.*

---

1. Select **Edit (Limited)** for the specific application the user is licensed to use.
2. **Don't** select **Full Access** for any application.
3. In the **Company Info, Assignments, Product Permissions, Reference Data, and Setup** sections, select the specific permissions required for this administrator.
4. Select **Next**.
5. On the **Product Assignments** screen, select all products that the user has permission to view and use.
6. Select **Done** to save your change.

# Compliance Hub User Guide

## Compliance Hub Dashboard overview

The Compliance Hub dashboard centralizes global regulatory deadlines, updates, and information for digital controls. It provides real-time insights and interactive tools to help organizations manage compliance obligations efficiently.

The screenshot shows the Compliance Hub dashboard for the topic 'E-invoicing and CTC'. The dashboard is divided into two main sections: 'Key metrics' and 'Regulatory deadlines'.

**Key metrics:** This section provides a 'Compliance summary' for the year 2026. It displays 'All deadlines' with 809 total deadlines and 106 jurisdictions. The 'Compliance status' is shown with three indicators: 0 green (Compliant), 0 orange (At Risk), and 807 blue (No status). A 'Your deadlines' section allows users to filter and customize their view.

**Regulatory deadlines:** This section shows a 'Regulatory deadlines' view for 2026. It includes a 'View' dropdown set to 'Your Deadlines', a 'Forecast' dropdown set to 'Yearly', and buttons for 'Timeline' and 'Table'. A navigation bar at the bottom shows the year 2026 with left and right arrows.

## Compliance Summary

Offers a concise overview of all compliance deadlines and jurisdictions, using color-coded status indicators (green, orange, blue) for rapid risk assessment. Users can filter to view only their relevant deadlines and jurisdictions, ensuring personalized compliance tracking.

This detailed view of the 'Compliance summary' section shows the following data for 2026:

Deadlines	Jurisdictions	Compliance status
809	106	0 Compliant, 0 At Risk, 807 No status

The 'Your deadlines' section includes a link to 'Set up your deadlines'.

## Regulatory Deadlines Timeline/Table

Shows upcoming regulatory deadlines in a timeline and table, enabling users to track obligations, filter dates, and plan ahead to prevent compliance issues.

The screenshot shows the 'Regulatory deadlines' section in 'Timeline' view for 2026. The timeline spans from January to December. A legend at the bottom indicates the status of deadlines: Not compliant (orange dot), No status (blue dot), and Compliant (green dot). A 'Go to deadlines' link is located at the bottom right.

## Regulatory Atlas

Interactive world map enables users to select a country for detailed compliance requirements. For instance, selecting Mexico displays key information on e-invoicing, CTC models, required infrastructure, formats, and archiving rules.



## Regulatory Updates

A real-time feed displays the latest regulatory changes by jurisdiction, detailing the effective date, country, and a brief summary (such as deadline extensions or new requirements). Users can pin preferred countries for quick reference and track compliance status for each update.

### Regulatory updates

## Compliance Summary Details

The Compliance Summary section offers a clear overview of compliance deadlines and statuses across jurisdictions. It features two primary views:

- **All deadlines:** Presents compliance data for every jurisdiction included in your subscription.
- **Your deadlines:** Shows compliance data tailored to your personalized filters and preferences.

This revised description is concise and aligns with the Compliance Hub's focus on rapid risk assessment and personalized tracking, as indicated in the surrounding context.

### All deadlines

**Deadlines:** Total number of compliance deadlines across all jurisdictions in the subscription.

**Jurisdictions:** Number of countries included in the subscription.

**Compliance status:**

**Green:** Compliant deadlines.

**Orange:** Deadlines at risk.

**Blue:** No status

**Your deadlines**

**Deadlines:** Number of deadlines matching your preferences.

**Jurisdictions:** Countries selected based on your deadlines”.

**Compliance status:**

**Green:** Compliant deadlines.

**Orange:** Deadlines at risk.

**Blue:** No status

**Year Filter**

Located on the top-right corner of the summary.

Enables selection of the year to display relevant compliance data.

**Definitions**

**Jurisdictions:** Countries selected based on your Compliance Hub filters or included in your subscription.

**Deadlines:** Compliance obligations for the selected year.

**Compliance Status:** Total counts for each status category (Compliant, At Risk, Pending).

**How to Use**

1. **Select Year:** Use the dropdown to pick the year you want to view.
  - **Review All Deadlines:** See compliance status for all jurisdictions.
  - **Review Your Deadlines:** Focus on deadlines based on your filters in Compliance Hub.

**Regulatory Deadlines Timeline/Table Details****Main Components**

1. **Timeline View**
  - Shows regulatory deadlines per month for the selected year.
  - Each dot represents a deadline and is color-coded by status:
    - **Red:** Not compliant
    - **Gray:** No status
    - **Blue:** Compliant

Hovering reveals a tooltip with deadline details (e.g., "3 not compliant").

- **View Selector**
- Toggle between:
- **Your deadlines:** Deadlines filtered for the user
- **All deadlines:** All regulatory deadlines

## 2. Forecast Selector

Choose to view:

**Yearly:** Deadlines for the selected year

**Multi-year:** Deadlines across multiple years

### Display Modes

**Timeline:** Visual, month-by-month view

3. Table: Detailed, tabular list of deadlines
4. Navigation
5. Use the "Go to deadlines" link to access the full regulatory deadlines page (Gantt chart view).

## How to Use

1. **Select View:**  
Choose between "Your deadlines" or "All deadlines" using the dropdown.
2. **Select Forecast**  
Pick "Yearly" or "Multi-year" for the timeline scope.
3. **Switch Display Mode:**  
Click **Timeline** for a visual view or **Table** for a detailed list.
4. **Hover for Details:**  
Move the cursor over any dot to see the tooltip with deadline counts.
5. **Navigate to Full Page:**  
Click **Go to deadlines** for a comprehensive Gantt chart.

## Regulatory Atlas

### Main Components

#### 1. Country Selector

- **Purpose:** Allows users to select a country.
- **How to Use:**
  - Click the dropdown menu labeled **Country**.
  - Choose the desired country from the list.
  - Alternatively, click directly on the map to select a country.

#### 2. Map/Table Toggle

- **Purpose:** Switch between **Map View** and **Table View**.

- **How to Use:**
  - Click **Map** for a visual representation.
  - Click **Table** for a tabular format.

### 3. Zoom Controls

- **Purpose:** Adjust the map view.
- **How to Use:**
  - Use **+** to zoom in and **-** to zoom out.
  - You can also use the mouse scroll wheel when hovering over the map.

### 4. Reset Button

- **Purpose:** Return to the default view.
- **How to Use:**
  - Click **Reset** to:
    - Zoom out to the entire world view.
    - Clear any selected country.

### 5. Quick Facts Panel

- **Purpose:** Displays key compliance details for the selected country.
- **Contents:**
  - Country name and compliance attributes (e.g., CTC model, pre-clearance, mandatory infrastructure).
  - Information on mandatory formats, suppliers, eSignature, archiving protocol, and rules for issuing/receiving invoices.
- **How to Use:**
  - Click on a country to open the **Quick Facts** panel.
  - Click **X** to close the panel.

### 6. Country Profile Button

- **Purpose:** Navigate to the detailed Country Compliance Profile page.
- **How to Use:**
  - Click **Country profile** at the bottom of the Quick Facts panel.

### 7. Tooltip

- **Purpose:** Display country names when hovering over the map.
- **How to Use:**
  - Move the cursor over any country to see its name.

## Regulatory Updates

## Main Components

### 1. Navigating Regulatory Updates

- **Location:** Access **Regulatory Updates** at the end of main dashboard
- **Sorting & Search:** Use the **Sort by newest** option or the **Search bar** to find specific updates.
- **Update Cards:** Each update card displays:
  - **Date & Country** (e.g., April 12, 2023 | Mexico)
  - **Title** (e.g., Extension of the timeline to comply with new CFDI version 4.0)
  - **Description** with details and official links.
  - **Compliance Status Badge** (Compliant, Not compliant, No status)
  - **Update Status Dropdown** for changing compliance status.

### 2. Updating Compliance Status

- Click **Update status** on the update card.
- Choose one of the following:
  - **Compliant** – You have met the requirement.
  - **Not compliant** – Requirement not met.
  - **No status** – Default state; no action taken yet.

### Where Status Appears

- **Deadline Dialog:** Shows badge (Compliant, Not compliant, No status).
- **Regulatory Deadlines Gantt Chart:** Color-coded by status.
- **All Updates Grid:** Displays your current status.

### 3. Status Behavior

- **Default:** “No status” until user updates.
- **Impact:** Status controls:
  - Badge in dialogs and timelines.
  - Color coding in Gantt charts.
- **Accessibility:** Ensure badges have `aria-live="polite"` for screen readers.

## 4. Interaction Rules

### Success

- If status updates successfully:
  - No system alert is shown.
  - Badge changes visually.
  - Screen readers announce the change.

### Failure

- If update fails:
  - Inline alert appears in the card:

“We couldn’t update your status. Try again or contact Support if the problem continues.”

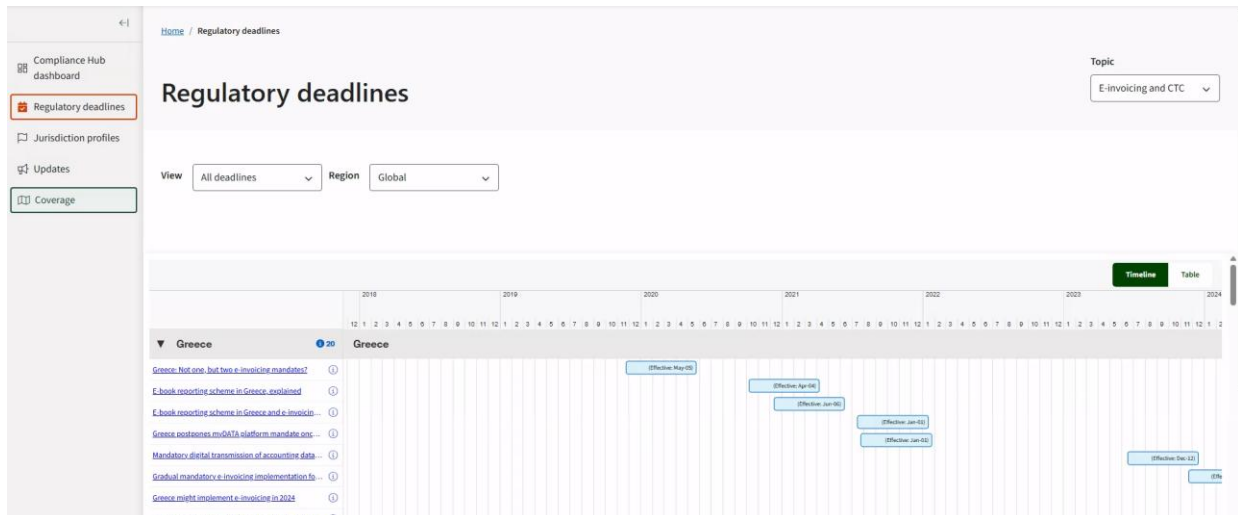
## 5. Visual Indicators

- **Compliant:** Green badge.
- **Not compliant:** Red badge.
- **No status:** Blue badge.
- Gantt chart and grids reflect these colors.

## 6. Tips

- Always check official links for details.
- Use the **Update status** dropdown to keep compliance tracking accurate.
- For accessibility, confirm badge containers use `aria-live="polite"`.

## Regulatory Deadlines Page



### 1. Overview

The **Regulatory Deadlines** feature in OCH helps users track compliance mandates across regions and topics. It provides two main views:

- **Timeline View:** Displays deadlines in a Gantt chart format.
- **Table View:** Displays deadlines in a tabular format.

### 2. Navigation

- Access the feature from the **Regulatory Deadlines** menu.
- Use the **sidebar icons** for navigation and exporting data.

### 3. Filters and Options

- **View:**
  - **All deadlines:** Shows all mandates organized by region.
  - **Your deadlines:** Displays a customized view based on user filters.
- **Region:**
  - Choose from **Americas, Africa, Asia, Europe, Oceania**.
- **Topic:**
  - Select compliance topics such as **Digital controls, ESG, Global trade, Indirect tax, Tax**.

### 4. Timeline View

- **Left Panel:**
  - Countries are listed with mandate counts and compliance status:
    - Green: Compliant
    - Orange: Not compliant
    - Blue: No status
- **Right Panel:**
  - Displays deadlines as bars with start and effective dates.
  - Clicking a mandate link scroll to its position on the timeline.

### 5. Table View

- Switch between **Timeline** and **Table** using the toggle.
- **Grouping Options:**
  - **Group by jurisdiction:** Sort by country.
  - **Group by date:** Sort by month.
- Export data as **XLS** (same format as displayed).

### 6. Compliance Status

- Status can be updated in the **Deadline Dialog:**
  - **Compliant, Not compliant, or No status**.
- Status affects:
  - Color coding in the timeline.
  - Badge display in updates grid.

### 7. Countries with No Deadlines

- If no mandates exist:
  - Caret rotates but does not expand.
  - Header shows “0 items”.

### 8. Deadline Details

- Click **Details** in Table View or a mandate in Timeline View to open the **Deadline Dialog**.
- Dialog shows:

- Mandate title.
- Date added and effective date.
- Description and recommendations.
- Link to **Read more** for full details.

## 9. Export

- Export deadlines in XLS format from both views.
- Format matches the grouping selected (by country or date).

## 10. Status Indicators

- **Icons:**
  - Green check: Compliant.
  - Orange triangle: Not compliant.
  - Blue circle: No status.
- Counts displayed next to country names (e.g., 12, 1, 2).

## Updates Page

The **Updates** page allows you to browse and track official and unofficial regulatory announcements related to topics such as **E-invoicing and Continuous Transaction Controls (CTC)**.

Date added	Effective date	Region	Jurisdiction	Description	Details	Status
	10/23/2018	Europe	Italy		Details →	ⓘ No Status
	12/01/2018	Europe	Spain		Details →	ⓘ No Status
	12/03/2018	Asia	Singapore		Details →	ⓘ No Status
	12/13/2018	Europe	Italy		Details →	ⓘ No Status
	05/26/2019	Asia	Russia		Details →	ⓘ No Status
	07/21/2019	Asia	Malaysia		Details →	ⓘ No Status
	07/24/2019	Europe	Poland		Details →	ⓘ No Status
	08/03/2019	Europe	Hungary		Details →	ⓘ No Status

### 1. Accessing the Updates Page

1. Open the left-hand menu.
2. Click **Updates**.
3. The Updates page opens by default on the **Official** tab.

### 2. Page Layout Overview

#### Header Section

- **Title:** *Updates*
- **Description:** Explains that the page displays government announcements and early intelligence.
- **Topic Selector (top-right):**
  - Use the dropdown to change the topic (e.g., *E-invoicing and CTC*).

### 3. Official vs. Unofficial Updates

- **Official:** Government-issued or confirmed regulatory announcements.

- **Unofficial:** Industry insights or early intelligence not yet officially published.

Click the tab to switch between the two views.

#### 4. Browsing Updates in the Table

Each row represents one regulatory update.

##### Table Columns

- **Date Added** – When the update was added to the system.
- **Effective Date** – When the regulation or change takes effect.
- **Region** – Geographic region (e.g., Europe, Asia).
- **Jurisdiction** – Specific country (clickable).
- **Description** – Short summary (if available).
- **Details** – Opens the full update.
- **Status** – Indicates the current status (e.g., *No Status*).

#### 5. Sorting and Filtering Data

##### Sorting

- Click the small arrow icon in any column header to sort:
  - **Ascending**
  - **Descending**

##### Filtering by Column

1. Click the filter icon in a column header (for example, **Region**).
2. Choose **Filter by Condition** or **Filter by Value**.
3. Select one or more values (e.g., Europe, Asia).
4. Click **Apply** to filter results.
5. Use **Clear** to remove filters.

#### 6. Using Search

- Use the **Search** box above the table to quickly find updates.
- Search works across multiple fields, such as jurisdiction names.

#### 7. Viewing Update Details

1. Click the **Details** → button on any row.
2. A popup window opens with:
  - a. Update title
  - b. Jurisdiction
  - c. Status
  - d. Date added
  - e. Effective date
  - f. Detailed explanation
3. Click **Read More** (if available) for additional information.
4. Click **Close** to return to the table.

#### Coverage Page

The **Coverage** page helps you understand whether specific regulatory obligations are **currently supported, planned, under review, or not supported** for each jurisdiction and transaction type.

Jurisdiction	Digital Control	Document Type Name	Ctc Model ID	Transaction Type Name	Outbound Flag	Inbound Flag	Archiving Flag	Comments
Albania (1 item)	E-invoicing	Invoice			Not supported	Not supported	Not supported	Comment
Andorra (2 items)	E-invoicing	Invoice		B2B	Supported	Supported	Supported	
				B2G	Supported	N/A	Supported	
Argentina (1 item)	E-invoicing	Invoice			Supported	Not supported	Supported	
Australia (2 items)	E-invoicing	Invoice		B2G	Supported	Supported	Supported	
				B2B	Supported	Supported	Supported	Comment
Austria (3 items)	E-invoicing	Invoice		B2B	Supported	Supported	Supported	
				B2G	Planned	N/A	Supported	Comment

## 1. Accessing the Coverage Page

1. Open the left-hand menu.
2. Click **Coverage**.
3. The Coverage page opens with a global overview by default.

## 2. Page Layout Overview

### Header Section

- **Title:** *Coverage*
- **Description:** Indicates whether obligations are supported, planned, or under review.
- **Topic Selector (top-right):**
  - Choose the topic you want to review (e.g., *E-invoicing and CTC*).

## 3. Region Filtering

### Region Dropdown

1. Locate the **Region** dropdown below the page header.
2. Select one of the following:
  - a. Global
  - b. Africa
  - c. Americas
  - d. Asia
  - e. Europe
  - f. Oceania
3. The table updates automatically based on your selection.

This allows you to quickly focus on a specific geographical area.

#### 4. Understanding the Coverage Table

Each row represents coverage information for a jurisdiction and transaction type.

##### Table Columns Explained

- **Jurisdiction** – Country name (number of items shows how many configurations exist).
- **Digital Control** – The type of control applied (e.g., *E-invoicing*).
- **Document Type Name** – Document covered (e.g., *Invoice*).
- **CTC Model ID** – Continuous Transaction Control model (if applicable).
- **Transaction Type Name** – Business context:
  - B2B (Business to Business)
  - B2G (Business to Government)
  - B2C (Business to Customer)
- **Outbound Flag** – Whether outbound transactions are supported.
- **Inbound Flag** – Whether inbound transactions are supported.
- **Archiving Flag** – Whether document archiving is supported.
- **Comments** – Allows viewing or adding notes.

#### 5. Coverage Status Indicators

Icons and labels are used to indicate coverage status:

- **Supported** – The obligation is currently supported.
- **Not supported** – The obligation is not supported.
- **Planned** – Support is planned and on the development roadmap.
- **Under review** – Support is being evaluated.
- **N/A** – No applicable obligation.
- **No info** – No information or analysis is available.

#### 6. Using the Definitions Panel

1. Click the **Definitions** button on the right side of the page.
2. A popup opens explaining all status icons and meanings.
3. Review definitions for clarity.
4. Click **Close** to return to the table.

This helps ensure consistent interpretation of statuses across jurisdictions.

#### 7. Viewing Multiple Items per Jurisdiction

- Some jurisdictions show multiple entries (e.g., B2B and B2G).
- Each line represents a **different transaction type or configuration**.

- Review each row to understand full coverage for that country.

## 8. Comments Feature

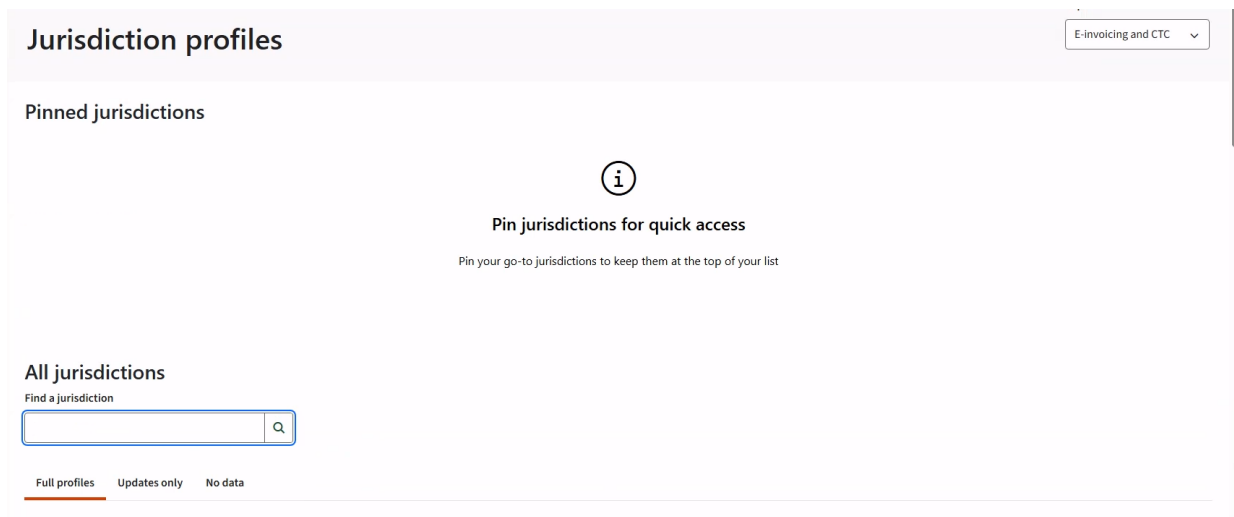
- Click **Comment >** in the **Comments** column.
- Use this to:
  - Capture clarifications
  - Flag country-specific considerations

## Jurisdiction Profiles

### Jurisdiction Profile (Pinned Jurisdiction)

#### Overview

The **Pinned Jurisdictions** feature allows users to quickly access their most relevant country profiles by pinning them at the top of the jurisdiction list. This is useful for compliance and regulatory tracking across multiple countries.



## Key Components

- 1. Pinned Jurisdictions Section**
  - a. Located at the top of the **Jurisdiction Profiles** page.
  - b. Displays countries that you have pinned for quick access.
- 2. All Jurisdictions Section**
  - a. Shows the complete list of countries organized into three categories:
    - i. **Full profiles:** Countries with complete compliance and regulatory details.
    - ii. **Updates only:** Countries with limited content (regulatory updates only).
    - iii. **No data:** Countries without available content.
- 3. Search and Filter**
  - a. Use the **Find a jurisdiction** dropdown to quickly locate a country.
  - b. Tabs allow filtering by **Full profiles**, **Updates only**, or **No data**.

### How to Pin a Jurisdiction

1. Navigate to **Jurisdiction Profiles**.
2. Locate the country you want to pin in the **All-Jurisdictions** list.
3. Click the **pin icon (+)** next to the country name.
4. The country will appear in the **Pinned Jurisdictions** section at the top.

### How to Unpin a Jurisdiction

1. In the **Pinned Jurisdictions** section, click the **close icon (x)** next to the country name.
2. A confirmation alert will briefly appear:  
*“Jurisdiction unpinned successfully.”*

### Additional Notes

- Clicking a pinned country name navigates to its **Country Profile** page.
- Only countries with **Full profiles** or **Updates only** can be pinned.
- A short confirmation alert appears when pinning or unpinning a jurisdiction.

### Visual Indicators

- **Green success alert** confirms unpinning.
- **Tabs** clearly separate countries by data availability:
  - **Full profiles:** Complete compliance guidance.
  - **Updates only:** Limited updates.
  - **No data:** No content is available.

### Search Countries

Go to the **Find a jurisdiction** dropdown at the top of the page.

Start typing the country name in the search box:

- The list will filter dynamically.
- Matching countries will appear in the dropdown menu.

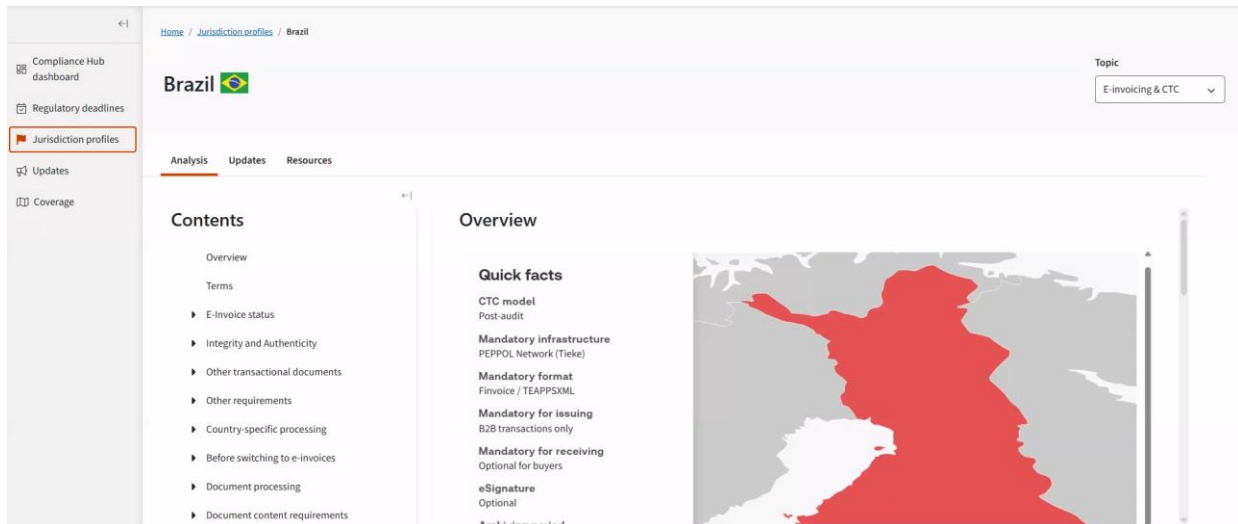
Select the desired country from the list:

- The system will navigate to the tab for that country.
- You can then view details or pin the country for quick access.

If the entered text does not match any country:

- An error message will appear: **“Enter a valid jurisdiction.”**
- The Drop down will not function until valid input is provided.

### Jurisdiction Profile Content



## Overview

Compliance Hub provides country-specific regulatory information for **e-invoicing and CTC**. Each country profile includes **Analysis**, **Updates**, and **Resources** tabs.

## Navigation

### Contents Panel (Left Sidebar)

- Common sections (depends on country content):
  - Overview
  - Terms
  - Regulatory environment
  - Enforcement status
  - Document processing
  - Business process & technical requirements
  - Domestic documents
  - Cross-border processes
  - Archiving rules
  - And more...

**Tip:** Use the sidebar to switch between sections.

**Show/Hide TOC:** The right-side button toggles the Table of Contents panel.

### Country-Specific Details

- **Quick Facts**

It's a tool that show the user some regulatory facts about the selected jurisdiction

- CTC model;
- Mandatory Infrastructure;
- Mandatory format;
- Mandatory for issuing;
- Mandatory for receiving;
- eSignature;
- Archiving;

- Archiving abroad;
- **Key Metrics**

## Export Function

- **Purpose:** Export all content from the **Analysis** tab into a PDF.
- **Steps:**
  - Click **Export** at the top right corner.
  - Confirmation messages:
    - **Analysis exported successfully** → Click **Download file**.
    - **Error** → Contact support.

The screenshot displays the Thomson Reuters Compliance Hub interface for the Brazil jurisdiction profile. The left sidebar contains navigation links: 'Compliance Hub dashboard', 'Regulatory deadlines', 'Jurisdiction profiles' (highlighted), 'Updates', and 'Coverage'. The main content area is titled 'Brazil' and includes a 'Topic' dropdown menu set to 'E-invoicing & CTC'. Below this, there are tabs for 'Analysis', 'Updates', and 'Resources'. The 'Documents' section is active, showing a list of documents for this jurisdiction. A search bar is located above the document table. The table has columns for 'Name', 'Type', 'Date', 'Initiative', and 'Download'. One document is listed: 'CCR Brazil' with type 'application/pdf' and date '01/14/2026'. Below the table, there are pagination controls including 'Page 1 of 1', 'Go to page:', and 'Items per page' (set to 10).

## Table of Contents Behavior

- Same structure for country profile.
- Left panel shows sections; right panel shows topics.
- Selecting a section scrolls the right-side content.
- Right-side page changes update left panel selection.

## Best Practices

- Regularly check **Updates** and **Resources** for new regulations.
- Use **Export** for offline review.
- Monitor **Key Metrics** for compliance planning.
- Review **Terms** for country-specific terminology.

# User Guide Terminology

## **Account Lockout Policy**

A security setting in ONESOURCE that specifies the number of unsuccessful login attempts required to initiate an account lockout, as well as the duration of the lockout period.

## **Administration (ONESOURCE Administration)**

The centralized platform where administrators manage users, groups, permissions, product access, security settings, and system configurations across ONESOURCE applications.

## **Administrator Permissions**

Access rights that determine what actions an administrator can perform, including viewing, adding, editing, or deleting user or system data.

## **Assignments (Administrator Permissions Section)**

A permission category that controls whether an administrator can manage client assignments and product assignments for users.

## **Authorities (Reference Data)**

Jurisdictional bodies (e.g., tax authorities) used across ONESOURCE applications for tax and regulatory purposes.

## **Client Manager**

A feature used to structure client-level data, allowing administrators to manage user access based on client assignments.

## **Compliance Hub (ONESOURCE Compliance Hub / OCH)**

A regulatory intelligence and compliance platform that consolidates e-invoicing, CTC, country profiles, and regulatory updates into a single workspace.

## **Continuous Transaction Controls (CTC)**

Real-time or near-real-time digital tax enforcement models that require transaction data (such as invoices) to be validated or reported to tax authorities.

## **Country Profile**

A detailed, country-specific content page in Compliance Hub containing regulatory analysis, requirements, processes, and updates for e-invoicing and CTC.

## **Currencies (Reference Data)**

Standard currency codes and names used across ONESOURCE applications for reporting and configuration.

## **Dashboard (Compliance Hub)**

The home screen displays compliance deadlines, regulatory updates, and country-level insights through interactive components such as timelines, maps, and summaries.

## **Deadline Dialog**

A pop-up window opened from the timeline or table view showing detailed information on a regulatory mandate, including dates, descriptions, links, and compliance status updates.

**Domains (Reference Data)**

Categorization structures used in ONESOURCE to standardize data classification across multiple tools and applications.

**Entities**

Legal or operational units within a company, managed in Company Info, used to structure user access and reporting.

**Full Access (Administrator Level)**

A permission setting that grants an administrator all available rights across every ONESOURCE application covered by the organization's licenses.

**Full Access (Product-Specific Administrator)**

A permission level granting full administrative control for selected ONESOURCE applications rather than all applications.

**Gantt Chart (Regulatory Deadlines)**

A timeline-based visual view showing regulatory deadlines represented as bars with start and end/effective dates.

**Groups**

Collections of users organized to simplify permission assignments and configuration management.

**IP Authorization**

A security configuration restricting access to ONESOURCE applications to specific IP addresses.

**Jurisdictions**

Countries or regions included in a user's ONESOURCE subscription, used in Compliance Hub to organize regulatory data.

**Locations**

Physical or operational addresses defined within Company Info, used for structuring data and access.

**Mandate**

A regulatory requirement, deadline, or compliance obligation tracked in Compliance Hub.

**Multi-Factor Authentication (MFA)**

A security measure requiring users to provide additional verification methods beyond a password.

**Notifications (Administration)**

A section showing import statuses, system alerts, and error messages related to data operations.

**Pinned Jurisdictions**

Countries a user selects to appear at the top of the jurisdiction list for quick access in Compliance Hub.

**Product Assignments**

Specific ONESOURCE applications a user is permitted to access, controlled by administrators.

**Product Permissions**

Permissions defining what actions a user or administrator can take within each ONESOURCE application.

**Reference Data**

Shared master data (e.g., Authorities, Currencies, Domains, Jurisdictions) used across ONESOURCE applications to maintain consistency.

**Regulatory Atlas**

An interactive Compliance Hub feature that visually displays global compliance information on a map and offers quick facts for each country.

**Regulatory Deadlines (Compliance Hub)**

A consolidated view of compliance obligations presented in timeline (Gantt) or table format.

**Regulatory Updates**

A real-time feed of regulatory changes by country, including summaries, effective dates, and links to official sources.

**Reporting (Administration)**

A section allowing administrators to view, run, and print reports related to user management and system activities.

**Single Sign-On (SSO)**

An authentication method allowing users to log in to ONESOURCE using their corporate identity provider.

**Support Access**

Temporary access granted to Thomson Reuters support for troubleshooting or technical assistance.

**Timeline View (Deadlines)**

A chronological display showing compliance deadlines by month using visual indicators.

**User**

An individual with access to ONESOURCE applications, managed through the Administration interface.

**View, Add, Edit, Delete Permissions**

Action-level permissions assigned to administrators or users determining their ability to interact with data in ONESOURCE.