

The Future of ONESOURCE Determination Original and Upgrading to ONESOURCE Determination Enterprise

Frequently Asked Questions

Question	Response
What is being announced?	<p>Thomson Reuters is announcing the consolidation of our investments and support for both, ONESOURCE Determination Original and ONESOURCE Determination Enterprise, to only ONESOURCE Determination Enterprise, deployed as a cloud, or cloud/on-premises hybrid solution (edge computing).</p> <p>Users of ONESOURCE Determination 5.x (deployed on-premises) and Determination Original (deployed as dedicated or multi-tenant cloud) should review the following FAQs associated with this change and review a path to upgrade to ONESOURCE Determination Enterprise.</p>
What is the timeline associated with the end-of-life announcement?	<p>Product Development:</p> <ol style="list-style-type: none"> 1. Product development, supporting ONESOURCE Determination v5.13*, including content and software updates, will continue for two years through June 2025. 2. Product development will be limited to content and major security updates from July 2025 through June 2026. 3. After June 2026, no further product developments for content or software updates should be expected. <p>Product Support:</p> <ul style="list-style-type: none"> • The Thomson Reuters' Support Team will conclude their support of ONESOURCE Determination v5.13, beginning July 2026. <ul style="list-style-type: none"> ○ Product support timelines are available in the Thomson Reuters Customer Support Knowledgebase: ○ Product lifecycle overview and details ○ Determination lifecycle timelines <p><i>*ONESOURCE Determination v5.13 is also known as ONESOURCE Determination Original</i></p>

<p>Why was the decision made to</p>	<p>At Thomson Reuters, our goal is to empower the growth and stability of our customers through all types of economies and external forces. Our customers trust us to provide reliable, modern tax applications delivering fast, accurate, and reliable performance, connect business processes across integrated applications for greater productivity, improved transparency, and better collaboration, and increase visibility of highly valued information across multiple data sources to elevate the strategic value of the tax team.</p> <p>Cloud-enabled solutions deliver superior capabilities and performance than on-premises solutions and alleviate the heavy burden and cost businesses must bear to maintain in-house. ONESOURCE Determination Enterprise, released in 2017 and used by hundreds of customers worldwide, has proven to meet or exceed the performance required by customers previously using ONESOURCE Determination Original.</p> <p>By informing customers three years in advance, the development of advanced migration tools and the support of experienced Thomson Reuters technical consultants, existing customers will find upgrading to ONESOURCE Determination Enterprise a more seamless transition, experiencing a faster time to value, than moving to another solution.</p>
<p>How do I know if I am a ONESOURCE Determination Original (5.x) customer?</p>	<p>Current customers and users of ONESOURCE Determination 5.x (deployed on-premises) and Determination Original (deployed as dedicated or multi-tenant cloud) can determine the version of ONESOURCE Determination your systems use, following the steps below:</p> <ol style="list-style-type: none"> 1. In your ONESOURCE application, navigate to the Help Tab on the top left corner and select “About Determination” from the dropdown menu. 2. A new window will open. Refer to System Version to find the Determination Version.
<p>What if I am on an older version, than the most current (5.13)? Do I have to upgrade to 5.13? What if I plan to upgrade to Determination Enterprise?</p>	<p>We recommend customers meet with their Thomson Reuters Account Executive and/or Client Success Executive to begin planning and preparing to upgrade to ONESOURCE Determination Enterprise. They will answer questions you may have, as you determine the best path for your company to take.</p> <p>If you are considering upgrading to Determination Enterprise then you do not need to be on the latest version (5.13) to do this (e.g., v5.11 or 5.12). If you plan on remaining on Determination 5.x, you will need to be on a supported version to take advantage of support and updates through the mainstream and extended support timeline. Please see Determination lifecycle timelines in our support Knowledge Base.</p>

What should I do?	<p>Thomson Reuters, ONESOURCE Determination Original customers have been upgrading to ONESOURCE Determination Enterprise since 2018.</p> <p>It is recommended, that existing customers meet with their Thomson Reuters Account Executive and/or Client Success Executive to discuss an upgrade.</p> <p>To begin planning and preparation for upgrading to ONESOURCE Determination Enterprise, a dedicated process, working with Thomson Reuters Professional Services has been formed to assist customers in conducting an initial analysis of their needs, develop an upgrade plan, and oversee its' execution.</p> <p>Upgrade to Enterprise:</p> <ul style="list-style-type: none"> • Engage with Thomson Reuter Professional Service (PS) team, or TR implementation partners, to provide consultation work to help with the upgrade. An engagement agreement will be provided to illustrate the upgrade process. • Decide the timing of the upgrade. The Upgrade team will analyze the customer's business processes and provide solutions for a successful upgrade to ONESOURCE Determination Enterprise. • Customers may consider using Determination Anywhere, an edge computing deployment model of the ONESOURCE Determination Enterprise tax engine, to continue use as an on-premises/cloud, hybrid solution.
When was ONESOURCE Determination Enterprise released?	<p>ONESOURCE Determination Enterprise was released in 2017 offering customers the latest in technology and global, tax content making it the most robust, cloud-native tax engine.</p>
What's different about ONESOURCE Determination Enterprise?	<p>Built using cloud-native technology, unique to Thomson Reuters solutions, ONESOURCE Determination Enterprise offers significant value to customers.</p> <p>We recommend meeting with your Account or Client Success Executive to understand the full breadth of unique capabilities, improved infrastructure, expanded tax content, as well as reliability and scalability that ONESOURCE Determination Enterprise offers.</p> <p>Joining our webcast, on August 2nd, is another great way to get an overview of these new capabilities.</p>

Are internal resources needed to upgrade?	<p>The upgrade process may require the following roles:</p> <ul style="list-style-type: none"> • Project Manager • Tax Functional Role • Business Role • Technical resource(s) <p>Please note that one person may fulfill multiple roles.</p>
What is the general upgrade process?	<p>The following steps provide a high-level overview of the general process for upgrading to ONESOURCE Determination Enterprise:</p> <ol style="list-style-type: none"> 1. Upgrade project kick off 2. Thomson Reuters, Professional Services provide access to ONESOURCE Determination Enterprise 3. Customer exports existing, ONESOURCE Determination Original, tax engine configurations 4. Thomson Reuters transfers and validates client setup 5. Post transfer analysis is performed 6. Thomson Reuters assists client in updating integration(s) 7. Thomson Reuters supports the creation of the customer test plan 8. Client tests new system with Thomson Reuters testing support 9. Production and readiness cut-over
How long does it take to upgrade to ONESOURCE Determination Enterprise Cloud?	<p>Our Thomson Reuters team of experts have the expertise, tools, and upgrade process clearly identified for ONESOURCE Determination Original customers. The process was created to be highly efficient and effective so that businesses minimize the cost to change and realize the benefits of the ONESOURCE Determination Enterprise solution, faster.</p> <p>Upgrading has taken most customers 2-6 months, however, it may require 1-2 years of planning to coordinate internal projects and prepare in advance. It is suggested that customers start to outline their plans now.</p>
What functionality will I lose moving from On-Premises to Enterprise Cloud?	<p>Thomson Reuters development has removed most limitations that would prevent a customer from moving to ONESOURCE Enterprise. Over the course of the next regularly scheduled releases, the product team will finish closing remaining functional gaps.</p>

What deployment models are supported by Enterprise?	<p>ONESOURCE Determination Enterprise can be deployed as a cloud only or with edge computing (cloud/on-premise hybrid solution).</p> <p>Customers can expect ONESOURCE Determination Enterprise to support most systems requiring tax determination and calculation services regardless of whether cloud or on-premises.</p> <p>Regardless of the number or deployment model, ONEOSURCE Determination Enterprise offers a centralized tax engine to manage indirect tax processes, policy, configuration, etc. from one centralized solution.</p>
How will I migrate my historical audit data to ONESOURCE Determination Enterprise?	<p>Customers may choose to migrate up to 7 years of reporting data to ONESOURCE Determination Enterprise and should discuss this with the Thomson Reuters Professional Services team.</p> <p>Customer's that do not decide to migrate historical data may run reports, or extracts, to migrate their historical transaction data into their own database or data warehouse. Thomson Reuters Professional Services can also assist with exploring options based on the customer's need.</p>
How will I facilitate updates for content and do my regression testing before going live?	<p>Customers that require or prefer to control when software upgrades and content updates are implemented, i.e. under their supervised control, can accomplish this by implementing Determination Anywhere. With Determination Anywhere, a customer can delay updates to the Determination Anywhere nodes for multiple days.</p>
How do I assess my needs will be met with ONESOURCE Determination Enterprise?	<p>Thomson Reuters Customer Success and Account Executives assigned to an account will provide the necessary information to help guide customers through the upgrade process. Working directly with these teams will provide customers access to the necessary resources to questions and other required information, from evaluation to upgrade planning.</p> <p>Customers are invited to an August Webinar where they will receive an overview of ONESOURCE Determination Enterprise, its' unique benefits, the steps to take in building their upgrade plan, and more.</p> <p>It is also recommended that customers attend SYNERGY 2023 and participate in dedicated, product training for ONESOURCE Determination Enterprise.</p>
I see there is an SLA but how reliable is Determination Enterprise and how do I protect my company from outages?	<p>Determination Enterprise cloud is highly reliable with customers experiencing a 99.995% uptime over the last 12 months (Apr 2023). The status of Thomson Reuters solutions can be found here: Thomson Reuters Corporates Status. Additionally, we track our uptime and report on it monthly in our online knowledgebase: ONESOURCE Determination Enterprise Cloud Tax Calculation Service 12-month Uptime Tracking (force.com)</p>

I was concerned about speed, performance, and resiliency so I deployed on Original Dedicated Cloud customer and had dedicated servers for tax calculation, what are my options in upgrading to Determination Enterprise?	<p>Determination Anywhere, the edge computing deployment option for Enterprise, supports a company's requirement for dedicated tax calculation. It expands on the dedicated server model, and even allows for a company to install it where they need it, to maximize performance and minimize latency. Whether hosted by Thomson Reuters or the business, the client will have dedicated compute nodes built on the latest containerization architecture to ensure scalability, reliability, and the performance they need. In addition, if the customer doesn't want their data in the cloud, because of privacy or data residency requirements, Determination Anywhere can either A) not record transaction results, or, B) stream transaction results to the customer's local data store.</p> <p>A customer may want to revisit leveraging ONESOURCE Determination Enterprise, as it has gone through significant improvements and upgrades to ensure the system calculates tax as fast as a dedicated system, that performance scales no matter how many transactions it processes, and can be upgraded and updated without any down time.</p> <p>Determination Enterprise cloud is very reliable with customers experiencing a 99.995% uptime over the last 12 months (Apr 2023). Customers can quickly see the status of our systems here: Thomson Reuters Corporates Status.</p>
As a Determination Original Dedicated Cloud customer, I chose the dedicated model to ensure my data was private. What are my options for Determination Enterprise?	<p>There are three options depending on your requirements:</p> <ol style="list-style-type: none">1. Determination Enterprise stores the transaction reporting data, on a separate reporting schema, per individual customer. This separation, at the schema level, provides another level of protection on top of data access controls built into the system.2. Customer may turn-off tax calculation auditing in the engine so that no transaction results are stored in the cloud. This will require customers use the transaction results, stored in your ERP or business application, to prepare tax returns and respond to audits.3. Determination Anywhere may be used to calculate tax and have tax results streamed locally to your own data store. This option will require you to license Determination Anywhere and either use it in your data center, cloud, or hosted by Thomson Reuters.

Because of data residency laws or other regulatory requirements, I can't have my transaction data on your servers. What are my options?	<p>Determination Enterprise support data residency requirements with two options:</p> <ol style="list-style-type: none">1. Customers may turn-off tax calculation auditing so that no transaction results are stored in the cloud. This will require users to access their transaction results, stored in your ERP or business application, to prepare tax returns and respond to audits.2. Determination Anywhere maybe used to calculate tax and store the results locally. This option will require users to license Determination Anywhere and deploy it in a data center, cloud, or have Thomson Reuters host it for a fee.
Is there anything else I should consider to help my tax department and business prepare for the future, since I am upgrading to ONESOURCE Determination Enterprise?	<p>Thomson Reuters' customers, that have upgraded to ONESOURCE Determination Enterprise, have evaluated additional tools and opportunities for automation, specific to the next generation, cloud-enabled solution. ONESOURCE Enterprise offers greater flexibility to integrate and speed processes that free up additional resources and save the business time and money, future proofing their compliance process and tax department.</p> <p>Potential processes to automate:</p> <ul style="list-style-type: none">• E-invoicing Compliance• Indirect Tax Compliance (Return preparation and filing)• Workflow and Data Management• Exemption Certificate Management