MY ACCOUNT

User Guide

THOMSON REUTERS

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MY ACCOUNT

My Account provides members of your organisation with the ability to view billing and payment information and to manage user access of your Thomson Reuters online services
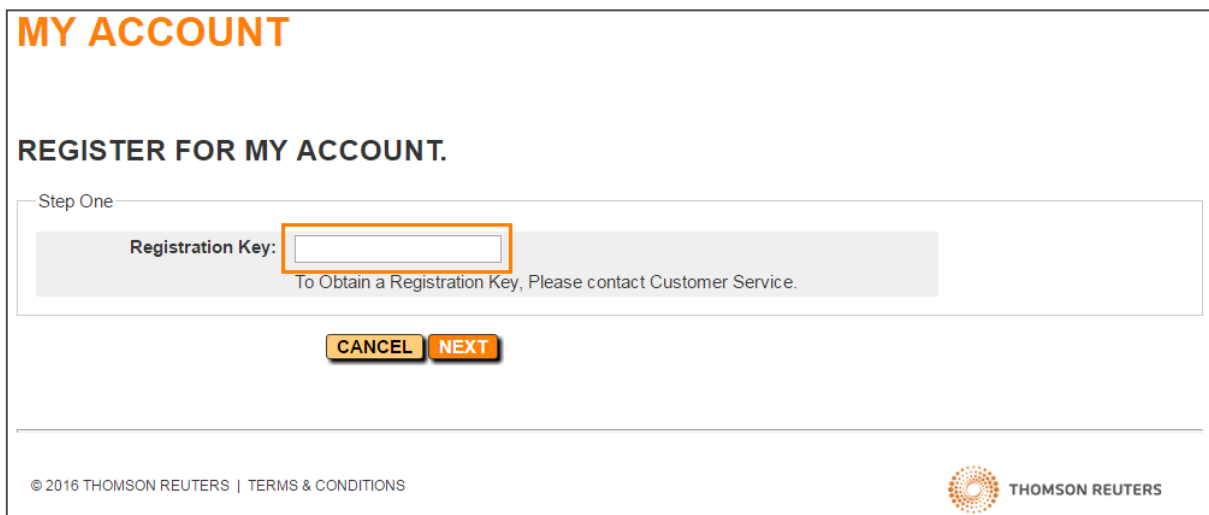
Accessing My Account
In order to access My Account you will need
- Your registration key which is generated by Customer Care
- Your OnePass Username and Password

Getting Started

Step 1: Go to **myaccount.thomsonreuters.com/myaccount/** and click on the **REGISTER NOW** button.

Step 2: Enter your registration key into the relevant field and click the **NEXT** button.

Figure 1: My Account Registration, Step 2

If you require a registration key please contact Customer Care .

P: 1300 304 195 (AU) | 0800 10 60 60 (NZ)
E: Care.ANZ@thomsonreuters.com

8AM-6PM (AU) | 8AM-8PM (NZ), Monday to Friday.

Step 3: Enter your email address into the relevant fields and click the **NEXT** button.

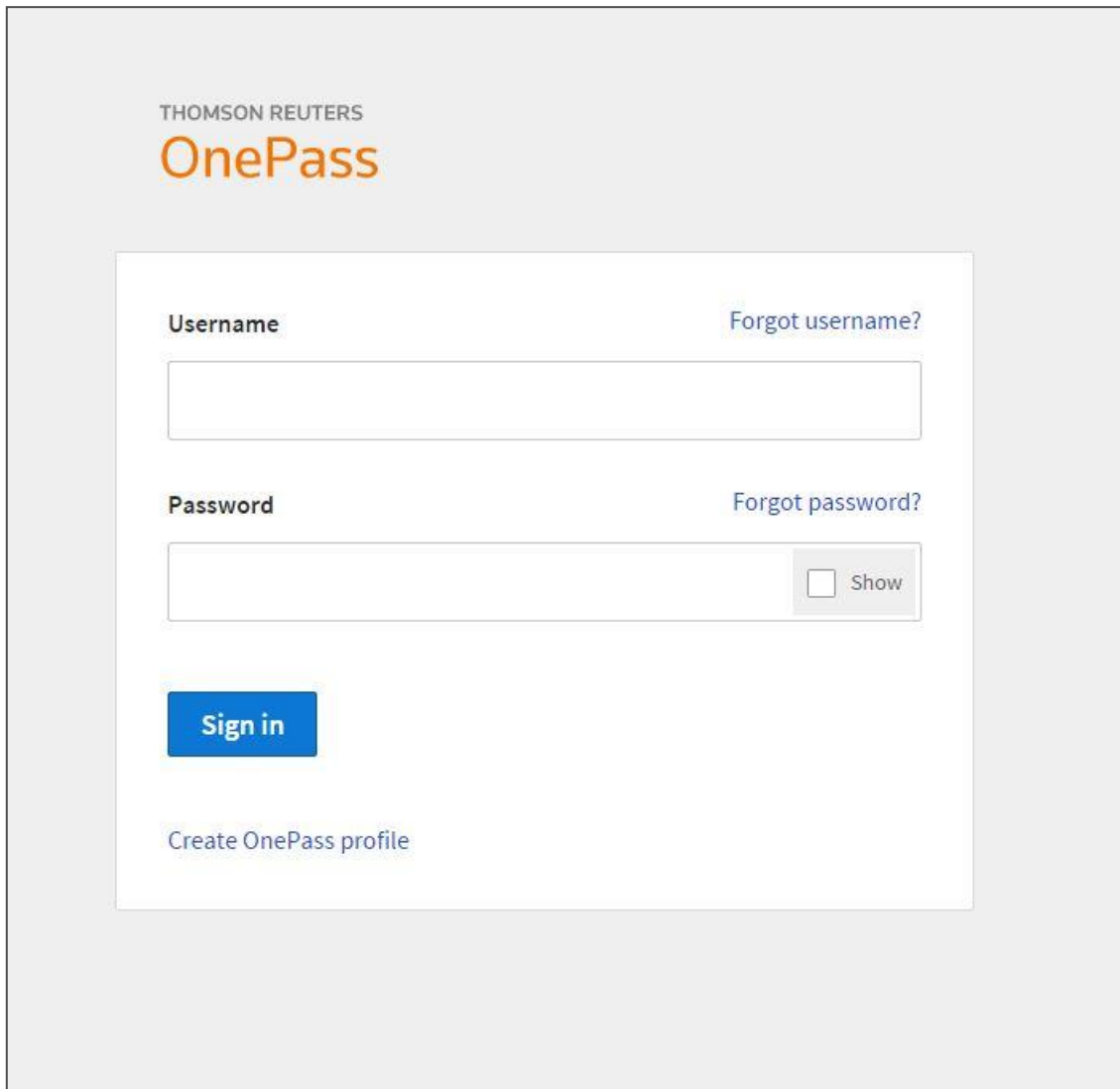*Figure 2: My Account Registration, Step 3*

Step 4: If you have an existing OnePass profile enter your login details and click on the **NEXT** button.

Figure 3: My Account Registration, Step 4 (A)

To Register a new OnePass

If you do not have an existing OnePass profile you will be asked to register a new OnePass profile. My Account will automatically redirect you to OnePass.

Click the **CREATE ONEPASS PROFILE** link.

Figure 4: My Account Registration, Step 4 (B)

To Register a new OnePass

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Enter your details into the create profile form and click **CONTINUE** once complete. Additional email addresses may be entered for added account security.

Once you have created your OnePass profile click **BACK TO MY ACCOUNT** in the top left corner.
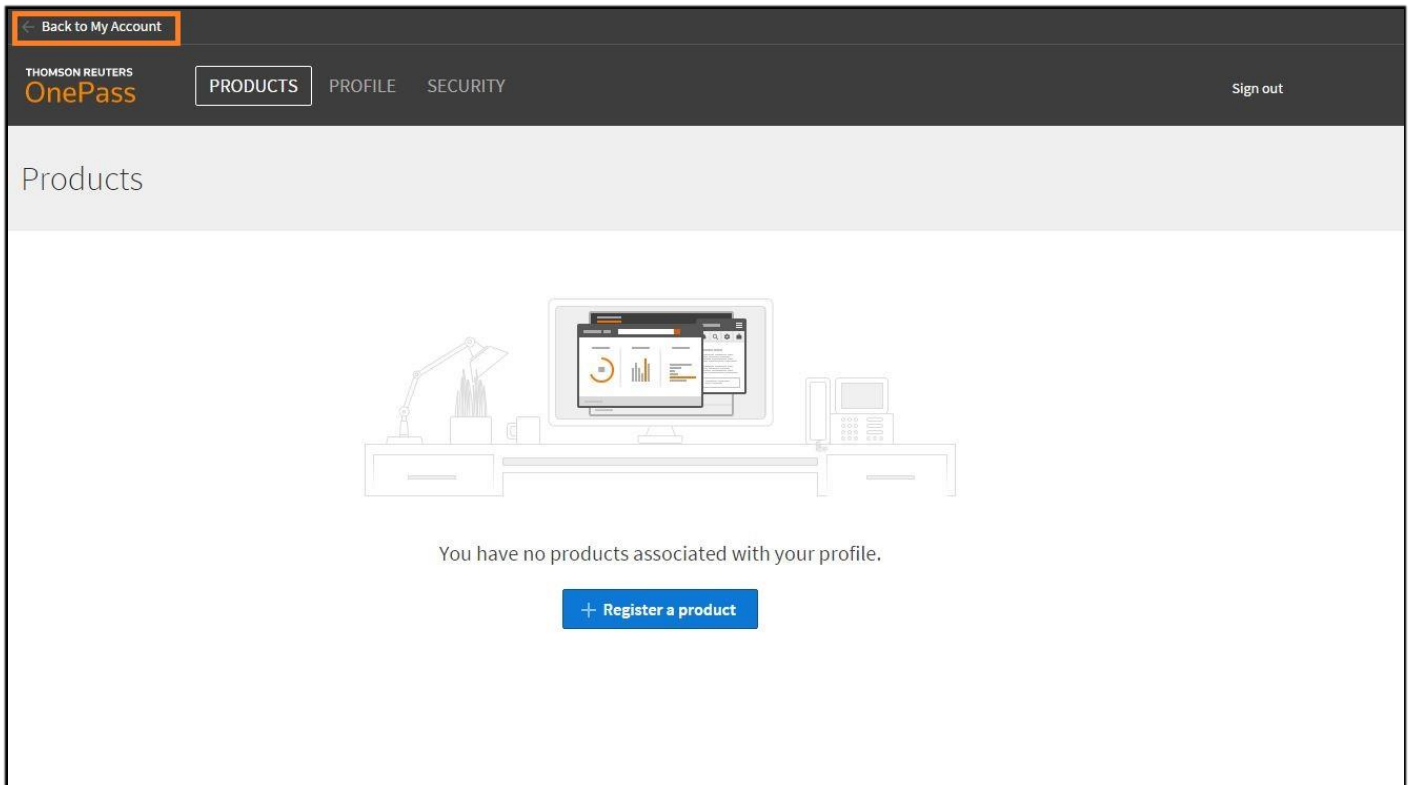

Figure 6: My Account Registration, Step 4 (D)

Enter in your new OnePass login details and click on the **NEXT** button.

Figure 7: My Account Registration, Step 4 (E)

Step 5: Once you have read through the terms and conditions select the checkbox next to **I AGREE** and click the **SUBMIT** button.

Figure 8: My Account Registration, Step 5

Navigating My Account

Once you have logged into My Account the My Account homepage will be displayed.

You can return to the homepage at any time by clicking on the My Account header in the top left-hand corner, or alternatively clicking the **HOME** menu.
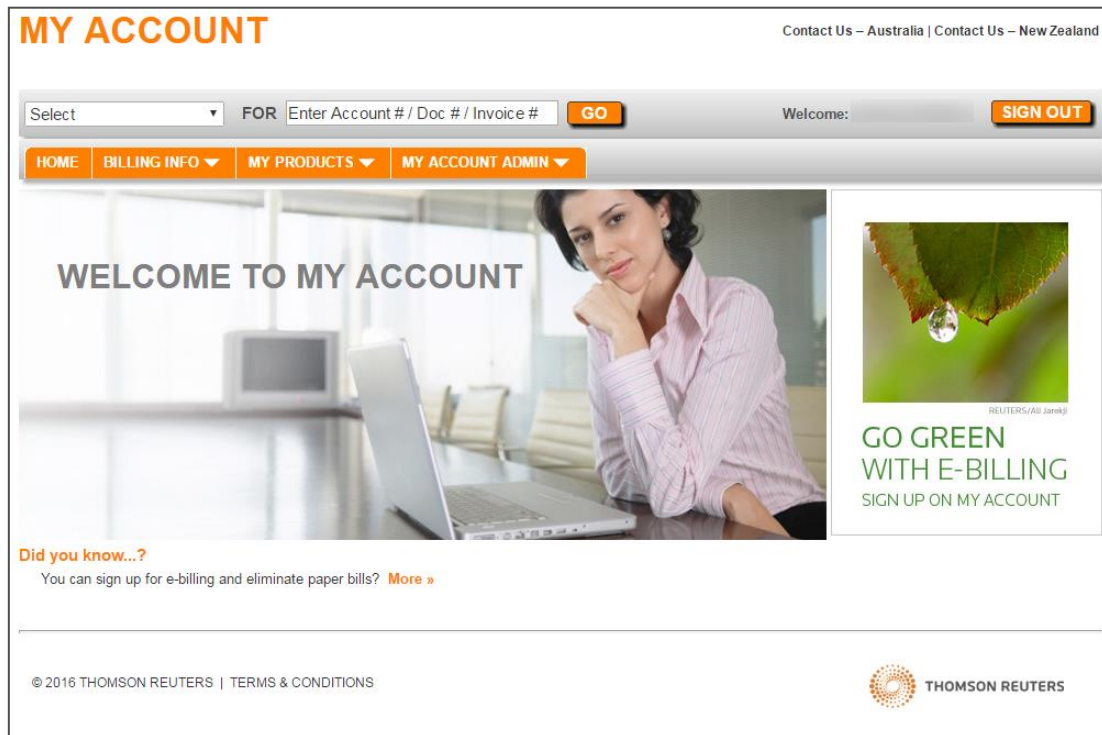

Figure 9: My Account Homepage

Quick Navigation

By using the drop-down menus (Billing Info, My Products & My Account Admin) you can navigate to view a copy of an invoice, view your payment history or to manage the online users' OnePass to your Thomson Reuters online products.

Menu Bar

From the My Account homepage you can navigate your way around using the orange drop-down Menu Bar. To select an option from the menu bar hover the mouse over the heading to view more options.

Billing Info

Under the **Billing Info** heading you can navigate to the Billing & Payment page, the Payment History page, the Payment Method page or the Invoice History page.

Figure 11: Billing Info Menu

My Products

Under the My Products heading you can navigate to the Manage Online Users page.

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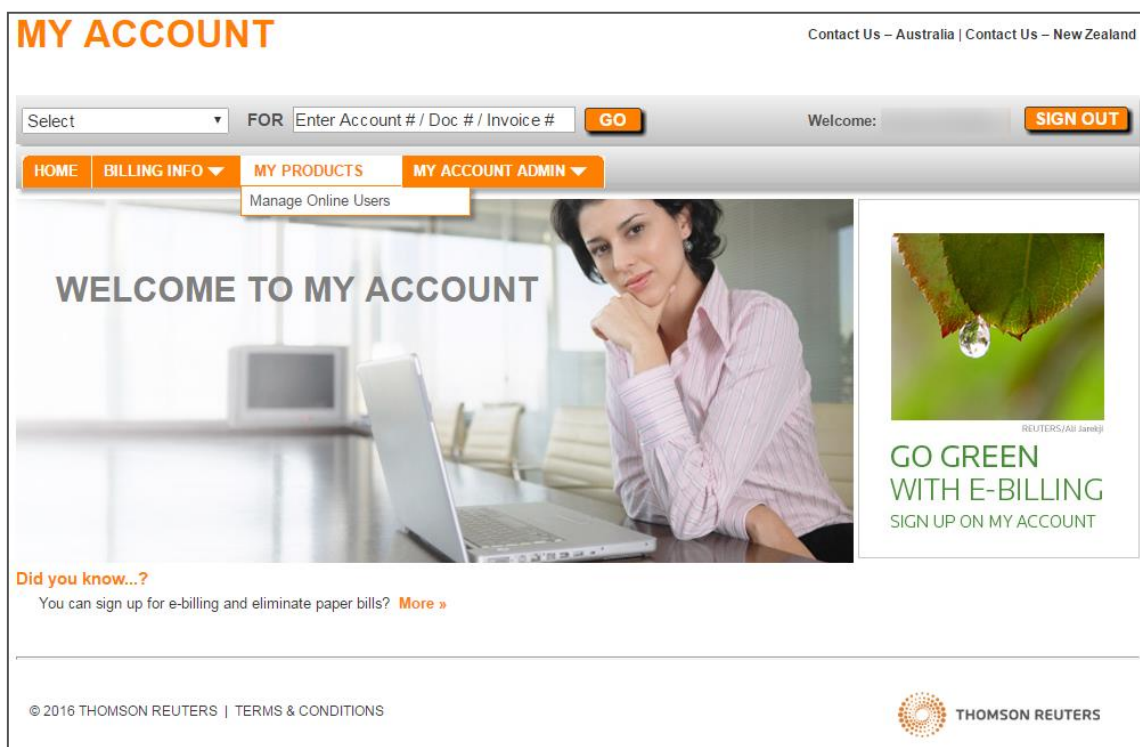**THOMSON REUTERS**®

Figure 12: My Products Menu

My Account Admin

Under the My Account Admin heading you can navigate to the Change Address page.

Administrative Access

If you have administrative access to My Account you can also navigate to the My Account User List page and Locations page.

Figure 13: My Account Admin Menu

Billing & Payment

The Billing & Payment page allows you to view an aging balance summary, your account balance details and a list of billing documents.

You may also view PDF copies of your invoices.

Note: The Billing & Payment page displays **open** items only and may take up to 48 hours to update.

Figure 14: Billing & Payment Page

Aging Balance Summary

The Aging Balance Summary section displays any outstanding amounts on your account categorised by the age of the debt.

Aging Summary as of 30/07/2016							
Currency	Not Due	1-30 Days	31-60 Days	61-90 Days	91-180 Days	181+ Days	Currency Total
AUD	361.00	0.00	0.00	0.00	0.00	0.00	361.00

Uninvoiced charge amounts may be reflected in the Aging Summary but not yet displayed.

Figure 15: Aging Balance Summary Section

Balance Detail

Clicking on the **BALANCE DETAIL** button will display the Balance Detail page providing a detailed breakdown of the invoice included in the Aging Balance Summary section.

Download List

	Invoice Date ▼	Due Date ▼	Invoice Number	Posting Number	Description	Aging	Charges Credits
1.	27/07/2016	26/08/2016	6109007625	6109007625	+ Nutshell: Australian Legal System 5e and other items **Item Detail**	Not Due	155.00 AUD
2.	27/07/2016	26/08/2016	6109007626	6109007626	Business and the Law 6e **Item Detail**	Not Due	130.00 AUD
3.	27/07/2016	26/08/2016	6109007627	6109007627	Principles of Dispute Resolution 2e **Item Detail**	Not Due	76.00 AUD

Figure 16: Balance Detail Page

Clicking on **Download List** will prompt your browser to download an Excel export of the information displayed on the Balance Detail page in csv format.

You can return to the Billing & Payment page at any time by clicking on the **BILLING & PAYMENT** button or by using the Menu Bar.

Billing Documents

The Billing Documents section displays a list of all open billing documents generated on your account in the past **180 days.** This includes invoices and credit or debit memos.

Download List

	Invoice Date ▼	Due Date ▼	Invoice Number	Description	Charges (Credits)
1.	27/07/2016	26/08/2016	6109007627	New Sale	76.00 AUD
2.	27/07/2016	26/08/2016	6109007625	New Sale	155.00 AUD
3.	27/07/2016	26/08/2016	6109007626	New Sale	130.00 AUD

Figure 17: Billing Documents Section

To view an invoice or multiple invoices within an invoice summary number, click on the PDF symbol next to the Invoice Number.

Clicking on **Download List** will prompt your browser to download an Excel export of the information displayed in the Billing Documents section in csv format.

Payment History

The Payment History page outlines any payments made on your account including the date the payment was received, a reference/check number, the payment status description and the amount.

Note: The Payment History page may take up to 48 hours to update.

Figure 18: Payment History Page

Clicking on **Download List** will prompt your browser to download an Excel export of the information displayed on the Payment History page in csv format.

For more detailed information about a payment you can click on the **Description link** of the payment. This will take you to the Payment History Detail page for that payment.

Figure 19: Payment History Detail Page

You can return to the Payment History page at any time by clicking on the **BACK TO PAYMENT HISTORY** button or by using the Menu Bar.

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Payment Method

The Payment Method page is currently unavailable in My Account.

Invoice History

The Invoice History page displays any invoices generated on your account within the last 13 months.

Note: The Invoice History page may take up to 48 hours to update.

Figure 20: Invoice History Page

To view an invoice, select the relevant date range and then click on the PDF symbol next to the Invoice Number.

Clicking on **Download List** will prompt your browser to download an Excel export of the information displayed in the Invoice History page in csv format.

Manage Online Users

The Manage Online Users page provides you with the ability to manage user access of all of the online subscriptions currently active on your account, excluding ProView and Firm Central ANZ. Due to the nature of these products, ProView and Firm Central online users can be viewed but not managed through My Account.

For all other products, you can add, delete or edit online users, as well as track the status of the registration keys in OnePass.

The Manage Online Users page displays a list of all existing online users including the user's name, contact ID and registration status.

Figure 21: Manage Online Users Page

Add Online User(s)

To add a new online user;

> **Step 1:** Select **Manage Online Users** from the **MY PRODUCTS** menu.
> **Step 2:** Click the **ADD USER(S)** button to display the **Add Online User(s)** page.
> **Step 3:** Complete the fields on this page as necessary.

Figure 22: Add Online User(s) Page

Entering an **End Date** will cause the registration keys generated by My Account to expire and the online user to be deactivated on the date specified.

Selecting the checkbox next to **Send Welcome Email to User** will generate a Welcome Email to be sent to the new user. My Account will also copy in the email address linked to your My Account login so that you can retain a copy of the Welcome Email for your records.

Select the relevant **Products** you would like the new online user to have access to. You can select subscriptions individually or in bulk by platform.

Note: If you subscribe to content on the Practical Law platform you may have complementary subscriptions to Westlaw AU that will also need to be selected.

Step 4: Click the **NEXT** button to continue.

On the ADD ONLINE USERS(S) - REVIEW page you have the option of adding multiple new online users by clicking on the **ADD MORE** button.

Step 5: Once you have added the necessary users to your request click the **SUBMIT** button.

Figure 23: Add Online User(s) – Review Page

My Account will display a **CONFIRMATION** of your request.

Figure 24: Add Online User(s) – Confirmation Page

Delete Online User(s)

You may also choose to delete or remove a user from the system

> S**tep 1:** Select **Manage Online Users** from the **MY PRODUCTS** menu.

> **Step 2:** Click the **DELETE USER(S)** button to display the Delete Online User(s) page.

> **Step 3:** Select the checkbox next to the users you wish to delete then click the **NEXT** button.

Figure 25: Delete Online User(s) Page

On the DELETE ONLINE USER(S) - REVIEW page you will be asked to enter an End Date for the users you have selected. Entering an End Date will cause all of the registration keys linked to this user to expire and the online user to be deactivated on the date specified.

Step 4: When you are ready to submit the request, click the **SUBMIT** button.

Figure 26: Delete Online User(s) – Review Page

My Account will display a confirmation of your request.

Figure 27: Delete Online User(s) – Confirmation Page

Manage Existing Online User(s)

To manage an existing online user

        Step 1: Select **Manage Online Users** from the **MY PRODUCTS** menu
        Step 2: Select a letter from the Jump To list or click the (show all) link to view a list of Users
        Step 3: Click on a **User's name** to display the **Online User Detail Profile** page.

From this page, you can click the **Edit** link to modify the user's Personal Information. Click the **Delete** link will take you to the Delete Online User(s) page.

You can also choose to click the **Manage Products** link to modify the products that a user has access to.

Figure 28: Online User Detail Profile Page

Manage Online Product Access

The Manage Online Product Access page provides the functionality to select or deselect the product(s) you would like the user to have access to

> **Step 1:** Follow steps 1 to 3 on page 22 to display the **Online User Detail Profile** page.
> **Step 2:** Click the **Manage Products** link to modify the products they have access to.
> **Step 3:** Add or remove ticks from the check boxes then click the **NEXT** button.
> **Step 4:** Click the **Submit** button to save changes.

Note: If you are adding new access My Account will confirm the products requested.
   If you are removing existing access My Account will require an End Date to be entered.

Figure 29: Manage Online Product Access Page

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Removing or Changing an Existing End Date

To remove or change an existing **End Date** click on the date listed in the End Date column.
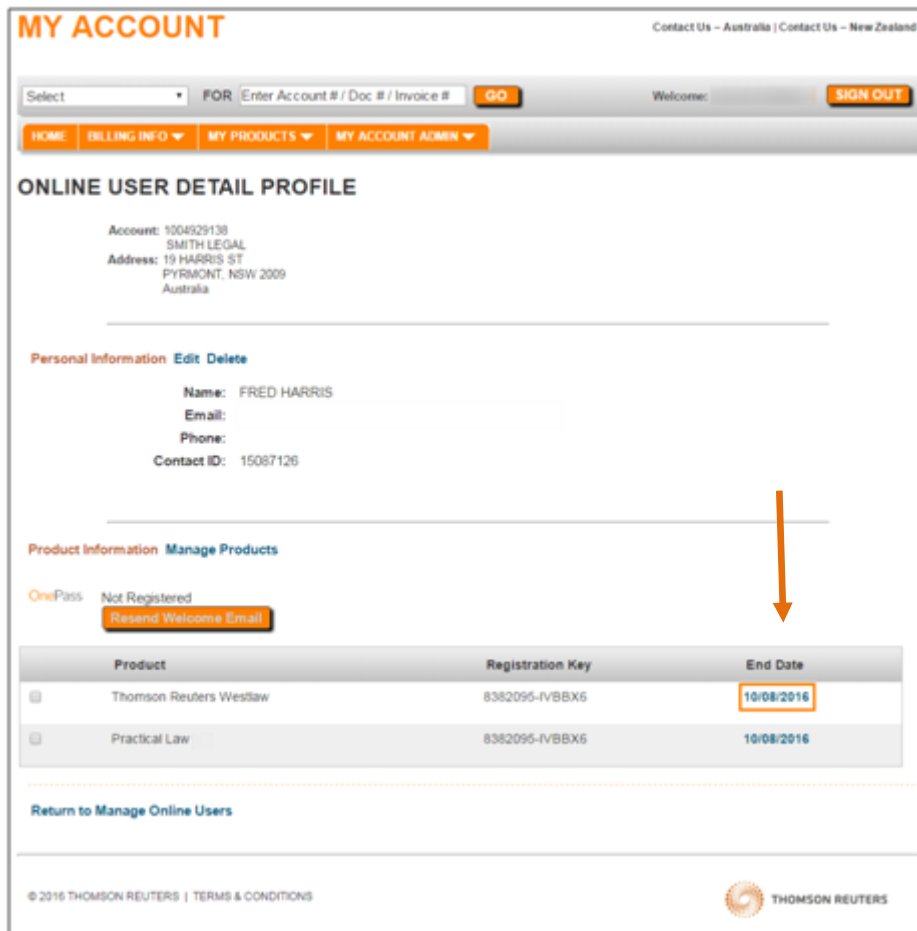
Figure 30: Online User Detail Profile Page

To remove the existing End Date, delete the date in the date field. To change the existing End Date, modify the date in the date field. Then click on the **SUBMIT** button.
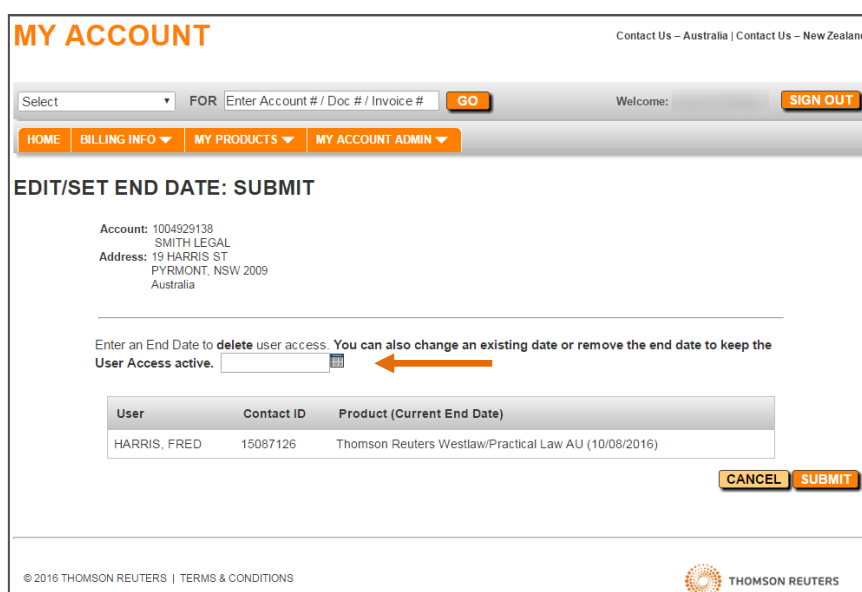

Figure 31: Edit/Set End Date: Submit Page

My Account will display a confirmation of your request. Please note that if you are removing an existing End Date My Account will state: *The following user(s) will be deleted on [BLANK].*

Figure 32: Delete Online User(s) – Confirmation Page

Note: If the user does not have an existing End Date and the column displays as [Blank], click on the Delete link and then follow Step4 on page 20.

Figure 33: Online User Detail Profile Page

Resending a Welcome Email

To resend a Welcome Email select the checkbox next to the platform required then press the **Resend Welcome Email** button.

My Account will ask you to confirm your selection including the email address the Welcome Email will be sent to.

Verifying OnePass Registration Information

If the user has activated their registration keys using OnePass you will be able to verify which OnePass profile they have been linked with.

Figure 35: Verifying OnePass Registration Information

My Account User List

The My Account User List page provides you with the ability to add, edit or remove an employee's access to My Account.

Note: To access this page you will require <u>additional administrative rights</u> added to your My Account profile by Customer Care. You can contact Customer Care on 1300 304 195 (AU) | 0800 10 60 60 (NZ) or <u>Care.ANZ@thomsonreuters.com</u>. Business hours are 8AM-6PM (AU) | 8AM-8PM (NZ), Monday to Friday.

The My Account User List page is not to be confused with managing access to your organisation's online subscriptions. Access to online subscriptions is handled through the Manage Online User(s) page.

- To **edit** an existing My Account user click on the Edit link.

- To **delete** an existing My Account user click on the Delete link.

- To **add a new** My Account user click on the Add Users link (highlighted below).

Figure 36: My Account User List Page

Add a New My Account User

To add a new My Account user;

> **Step 1:** Select **My Account User List** from the **My Account Admin** menu.
>
> **Step 2:** Complete the required fields on the **Add My Account User** page.
>
> **Step 3:** Selecting the checkbox next to Manage My Account Users will give the new user the ability to add, edit or remove My Account users.
>
> **Step 4:** Selecting the checkbox next to Send Email Invitation will send the new user their My Account registration key via email. This is checked by default.

Figure 37: Add My Account User Page

Change Address

The Change Address page allows you to request a change of address for an account.

Step 1: Select the account that you would like the address altered on and then click on the **NEXT** button.

Figure 38: Change Address Page

Step 2: Complete the required fields and enter any relevant comments into the **Text** field, then click the **SUBMIT** button.

Our Customer Care team will receive your request and may contact you to confirm the requested change.

Figure 39: Change Address – Edit Address Page

Locations

Clicking on an account number using the Locations page will take you to the My Account User List for that account.

Figure 40: Locations Page