

## 20.1 PRODUCT RELEASE NOTES

FOR SPEND ANALYTICS+ ENHANCEMENTS

---

APRIL 6, 2020 - FINAL VERSION



# TABLE OF CONTENTS

WELCOME .....	1
SPEND ANALYTICS+ ENHANCEMENTS .....	2
GUI Support for Merge Mapper Step in Engine Configuration .....	2
GUI Support for In Place Lookup Step in Engine Configuration .....	6

# WELCOME

The purpose of the **Product Release Notes** is to prepare administrators for the upcoming 20.1 release. The main goal of this document is to provide an overview of key features that are planned and committed for delivery.

**Important:** Please see the General release notes document for information about features that affect all modules, as well as some features that are intended for multiple modules. These include:

**Objects Deletion Consolidation**

**Objects Administrative Deletion**

**Visibility on Archived Object Lists of Other Buyer Organizations**

**Redefine Rights in Objects - "Select All" Option**

**Ability to Search on Project Team when Adding Users to Objects**

**Ability to Restrict Users to Creating Objects from Templates**

**Template Name Visibility in Object Details**

**Separate Access Right for RFx, Auction and Contract Attachments**

## FEATURE ICON KEY

Features may be added after publication of the Release Preview document. Additionally, in some cases, a feature may be included with a specific Product group for the Release Preview, but moved to another Product group for the full Product Release Notes. If there is a noteworthy change to a feature, the release note will be marked with one of the following icons:

<b>New!</b>	Indicates that the feature release note was added since the initial version of the release notes was published with the push to the test environment.
<b>Updated!</b>	Indicates that the feature release note has had a major update since the initial version of the release notes was published with the push to the test environment.
<b>Moved!</b>	Indicates that the feature release note has been moved to a different document since the initial version of the release notes was published with the push to the test environment.

# SPEND ANALYTICS+ ENHANCEMENTS

## GUI Support for Merge Mapper Step in Engine Configuration

Merge Mapper is a required step for loading of Spend Master and Reference data. This step moves data from the source table to the target table, either with direct mapping or by applying a constant value. It determines if an existing record should be updated or a new record should be inserted, based on a unique business transaction key. Currently, there is no user interface for configuring the Merge Mapper step. A user must know how to format JSON in order to perform this task. In release 20.1, we will be providing a GUI that can be used to configure the step. By default, only the GUI configuration option will be available. However, a new User Right will be available that can be used to allow specific users to continue to configure the step in JSON.

### Customer Impact

- Related Solutions: Spend Analytics+
- Feature Activation: This feature is **ON** by default.
- New User Rights related to this feature: None.
- New Notifications related to this feature: None

### USER IMPACT

---

- Engine configuration is primarily an Spend Data Load Administrator task. Please see **Administrator Impact** for additional information about using this feature.

### ADMINISTRATOR IMPACT

---

- A new configuration GUI is now available when adding and configuring a Merge Mapper step in Engine Configuration. By default, only the GUI option is available with the exception of users who have been assigned the Administrator or Data Load Administrator Spend Roles. Specifically, the EngineConfigExportMode feature enables/disables the ability to edit the step via the JSON options. Those users will have the option to continue formatting the step in JSON in addition to the GUI.
- In release 20.1, *Direct*, *Constant* and *Function* mapping can be accomplished through the GUI. Additional options may be available in future releases.
- Follow the steps below to create a mapping.
  1. Navigate to **Spend Data Load > Engine Configuration**. Select the appropriate configuration from the drop-down options in the top-right corner of the screen.
  2. In the **Configuration** column on the left, locate and expand the appropriate process.
  3. Create or open a **Merge Mapper** step.
  4. In the **View** field, *Form* is selected by default. This option displays the GUI. **Note:** For users who still have the capability of formatting in JSON, this will display as a drop-down option in the View field. To perform the configuration in JSON, select this option. No changes have been made to the JSON process.
  5. Configure the step parameters on the **Parameters** tab.

- **Auto Map Matching Field Names** - Select this option to auto map matching field names with same data type implicitly.
- **Clear Backup before Mapping** - Select this option to delete all records out of the Backup table before mapping.
- **Backup After Mapping** - Select this option to backup the data after the mapping completes. This option is selected by default when you create the step.
- **Reset Statistics** - Select this option to reset the table statistics before running the step. This is useful if there is a very large data set that will be loaded into the target table.
- **Allow Unsafe Mappings** - Select this option to allow matches which are not possible in all cases (string to numeric, for example).
- **Clear Target Before Mapping** - Select this option to remove all data from the target table before mapping.
- **Copy Mode Only** - Select this option to run the step and leave the data in the source table as well.
- **Update Record Size** - Enter a count that defines the number of records which are moved from source to target before committing the move to the database. The default value is 50,000.

View  
Form

Parameters Mappings

Auto Map Matching Field Names

Clear Backup Before Mapping

Backup After Mapping

Reset Statistics

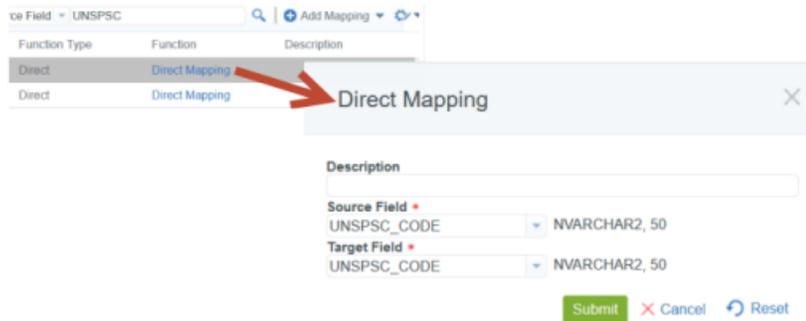
Allow Unsafe Mappings

Clear Target Before Mapping

Copy Mode Only

Update Record Size  
50,000

6. To manage the mapping, click on the **Mappings** tab. If there are existing mappings assigned to the step, they display in the **Mappings** section of the tab.
  - Information is displayed for each mapping in the following columns; **Target Field**, **Source Field**, **Function Type**, **Function** (a link to display the mapping configuration) and **Description** (if available). Click on a column header to sort the mappings by that column.
  - Clicking on the function link displays the mapping configuration.

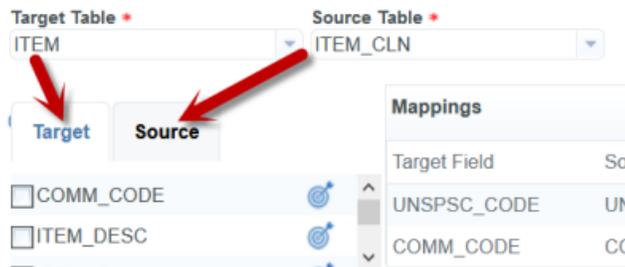


- You can filter the available mappings by using the search feature. Select a search parameter, enter a value in the text field and click the  icon. An example is shown below:

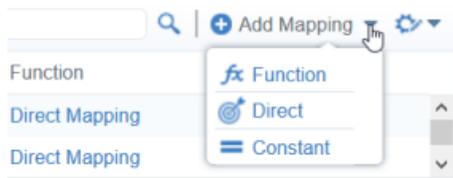
Mappings		Source Field	Target Field	Function
UNSPSC_CODE	UNSPSC_CODE	UNSPSC		Direct Mapping
COMM_CODE	COMM_CODE			Direct Mapping

7. Create a new mapping.

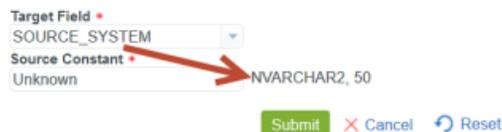
- In the **Target Table** field, select the target table from the drop-down options.
- In the **Source Table** field, select the source table from the drop-down options. The fields for each selected table display in the **Target** and **Source** tabs below the table fields. If a field has already been mapped, an icon displays which indicates the mapping type. In the image below, the  indicates that the field has been used in a **Direct** mapping. Hover your cursor over the column name to display the data type and size.



- Select the business keys in the Target table by clicking the appropriate checkbox(es). At least one business key must be selected for the table. **Note:** Fields identified as business keys can only be used for Direct or Constant mapping types.
- Select the **Add Mappings** button and select a mapping type.



- e. Configure the mapping as appropriate for the mapping type.
- Function Mapping** - This type maps the data based on a function. Configure the fields as described below and click **Submit** to save the mapping. To cancel the mapping, click the **Cancel** button. To reset all of the fields click the **Reset** button.
    - Description** - Enter a meaningful description for the mapping.
    - Function (required)** - Select the mapping function.
    - Input Parameters (required)** - Configure the parameters. Select an input type from the Input Type drop-down options (Field or Constant) and enter a value in the Assigned Value field. All input parameters are required.
    - Target Field (required)** - Select a field for the Target table.
  - Direct Mapping** - This type maps a field from the Source table directly to the Target table. Configure the fields as described below and click **Submit** to save the mapping. To cancel the mapping, click the **Cancel** button. To reset all of the fields click the **Reset** button.
    - Description** - Enter a meaningful description for the mapping.
    - Source Field (required)** - Select the field for the Source table.
    - Target Field** - Select the field for the Target table.
  - Constant Mapping** - This maps a field in the Target table with a constant from the Source table. Configure the fields as described below and click **Submit** to save the mapping. To cancel the mapping, click the **Cancel** button. To reset all of the fields click the **Reset** button.
    - Description** - Enter a meaningful description for the mapping.
    - Target Field (required)** - Select the field for the Source table.
    - Source Constant (required)** - Enter a constant value. The constant value entered must match Target field data type and size. When the Target field is selected, this information displays to the right of the Source Constant field, as shown below.



- f. Once the mapping has been submitted, the user is returned to the Configuration screen. If the mapping is invalid, the function displays in **red** in the Function column, as shown below. Hovering over the Function link will display text that describes the error.

Function Type	Function	Description
Constant	Constant Mapping	
Direct	Direct Mapping	

- Mappings can be cleared and deleted from the Actions menu  in the Mappings section.
  - To delete one or more specific mappings, select them in the Mappings list. Click the Actions menu and select *Delete Mapping*.
  - To delete all invalid mappings, click the Actions menu and select *Delete Invalid Mappings*.
  - To clear all mappings, click the Actions menu and select *Clear All Mappings*.
- Mappings can be generated from the Actions menu  in the Mappings section. Click on the Actions menu and select *Generate Mappings*.

## INTEGRATION IMPACT

---

- This feature does not impact integration.

## Supplier Impact

- This feature does not impact suppliers.

# GUI Support for In Place Lookup Step in Engine Configuration

Lookup Mapper is a required step for loading of Spend Invoice data. This step provides the ability to lookup data in a separate table and return data from that table to the target table. The lookup is based upon a set of business keys from the target table matched to the lookup table. Previously, there was no user interface for configuring the InPlaceLookup step. A user needed to know how to format JSON in order to perform this task. In release 20.1, we are providing a GUI that can be used to configure the step. By default, only the GUI configuration option will be available. However, a new User Right is available that can be used to allow specific users to continue to configure the step in JSON.

## Customer Impact

- Related Solutions: Spend Analytics+
- Feature Activation: This feature is **ON** by default.
- New User Rights related to this feature: None.
- New Notifications related to this feature: None

## USER IMPACT

---

- Engine configuration is primarily an Spend Data Load Administrator task. Please see **Administrator Impact** for additional information about using this feature.

## ADMINISTRATOR IMPACT

- A new configuration GUI is now available when adding and configuring a **InPlaceLookup** step in Engine Configuration. By default, only the GUI option is available with the exception of users who have been assigned the Administrator or Data Load Administrator Spend Roles. Specifically, the **EngineConfigExportMode** feature enables/disables the ability to edit the step via the JSON options. Those users will have the option to continue formatting the step in JSON in addition to the GUI.
- Follow the steps below to create a mapping.
  1. Navigate to **Spend Data Load > Engine Configuration**. Select the appropriate configuration from the drop-down options in the top-right corner of the screen.
  2. In the **Configuration** column on the left, locate and expand the appropriate process.
  3. Create or open a **InPlaceLookup** step.
  4. In the **View** field, *Form* is selected by default. This option displays the GUI. **Note:** For users who still have the capability of formatting in JSON, this will display as a drop-down option in the View field. To perform the configuration in JSON, select this option. No changes have been made to the JSON process.
  5. Configure the step parameters on the **Parameters** tab.
    - **Change Manage Records** - Select this option to apply this update only to records that have been change managed (the last "changed date" is less than or equal to the "modified date" of the Lookup. If this parameter is not selected, all matching records will be updated.
    - **Apply Change Management** - Select this option to identify the updated record as changed so that change management can be applied thru the application.
  6. To manage the mapping, click on the **Mappings** tab. If there are existing mappings assigned to the step, they display in the **Mappings** section of the tab.
    - Information is displayed for each mapping in the following columns; **Target Field**, **Source Field**, **Function Type**, **Function** (a link to display the mapping configuration) and **Description** (if available). Click on a column header to sort the mappings by that column. You can filter the available mappings by using the search feature. Select a search parameter, enter a value in the text field and click the  icon. An example is shown below:

Mappings		Source Field	UNSPSC	
Target Field	Source Field	Function Type	Function	
UNSPSC_CODE	UNSPSC_CODE	Function Type	Direct Mapping	
COMM_CODE	COMM_CODE	Function	Direct Mapping	
		Description		

7. Create a new mapping.
  - a. In the **Target Table** field, select the target table from the drop-down options. The columns associated with the selected table display in the **Target** tab.
  - b. Click the **Add Mapping** button  **Add Mapping** . The **Lookup Mapping** screen displays.
  - c. Enter a meaningful description for the mapping in the **Description** field (optional)
  - d. Select the Lookup table from the drop-down options in the **Lookup Table** field.

- f. Drag a field from **Target** table and drop it on a field in the **Lookup Table** to map the fields. Target fields and Lookup fields on the same row must be of the same data type and size. At least one field-to-field mapping must be complete in order to save the mapping.
- g. Click **Submit** to save the mapping.
- Mappings can be cleared and deleted from the Actions menu  in the Mappings section.
  - To delete one or more specific mappings, select them in the Mappings list. Click the Actions menu and select *Delete Mapping*.
  - To delete all invalid mappings, click the Actions menu and select *Delete Invalid Mappings*.
  - To clear all mappings, click the Actions menu and select *Clear All Mappings*.
- Mappings can be generated from the Actions menu  in the Mappings section. Click on the Actions menu and select *Generate Mappings*.

## INTEGRATION IMPACT

---

- This feature does not impact integration.

## Supplier Impact

- This feature does not impact suppliers.