

20.3 PRODUCT RELEASE NOTES

FOR SPEND ANALYTICS+ ENHANCEMENTS

NOVEMBER 9, 2020 - FINAL VERSION



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WELCOME

The purpose of the **Product Release Notes** is to prepare administrators for the upcoming 20.3 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.

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:

New!	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.
Updated!	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.
Moved!	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.

Improved User Guidance for Embedding Machine Learning Engine Models

In the 20.3 release, we are improving the user guidance for embedding machine learning models. We are embedding a more automated functionality into our IntelliClass wizard, reducing the requirements for user input. Users are able to select from a set of templates that have already been configured. This makes embedding machine learning functionality to enrich data simpler, especially for users who have a limited set of technical skills.

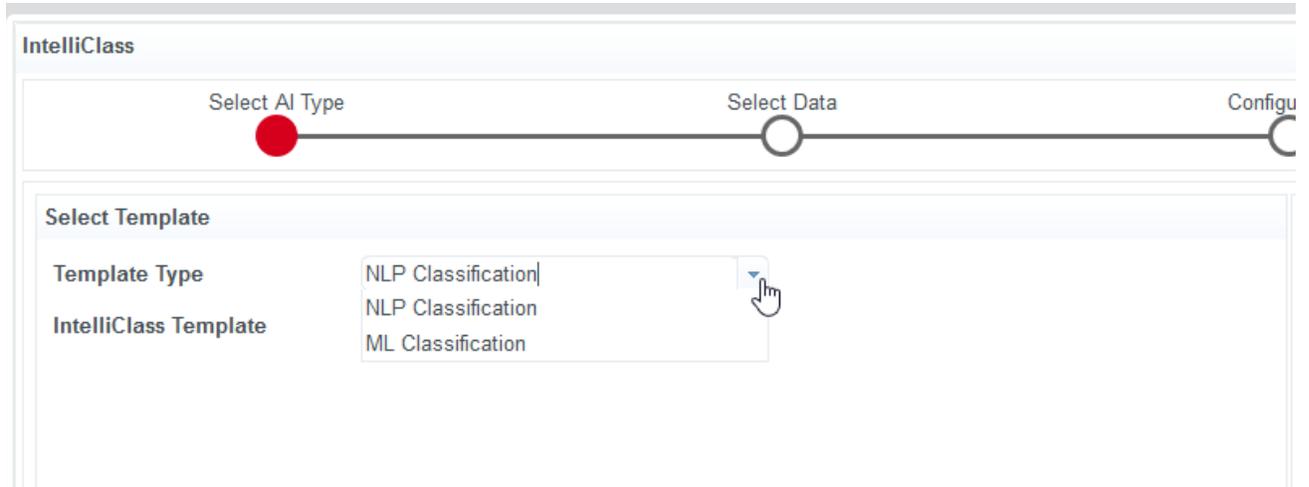
Customer Impact

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

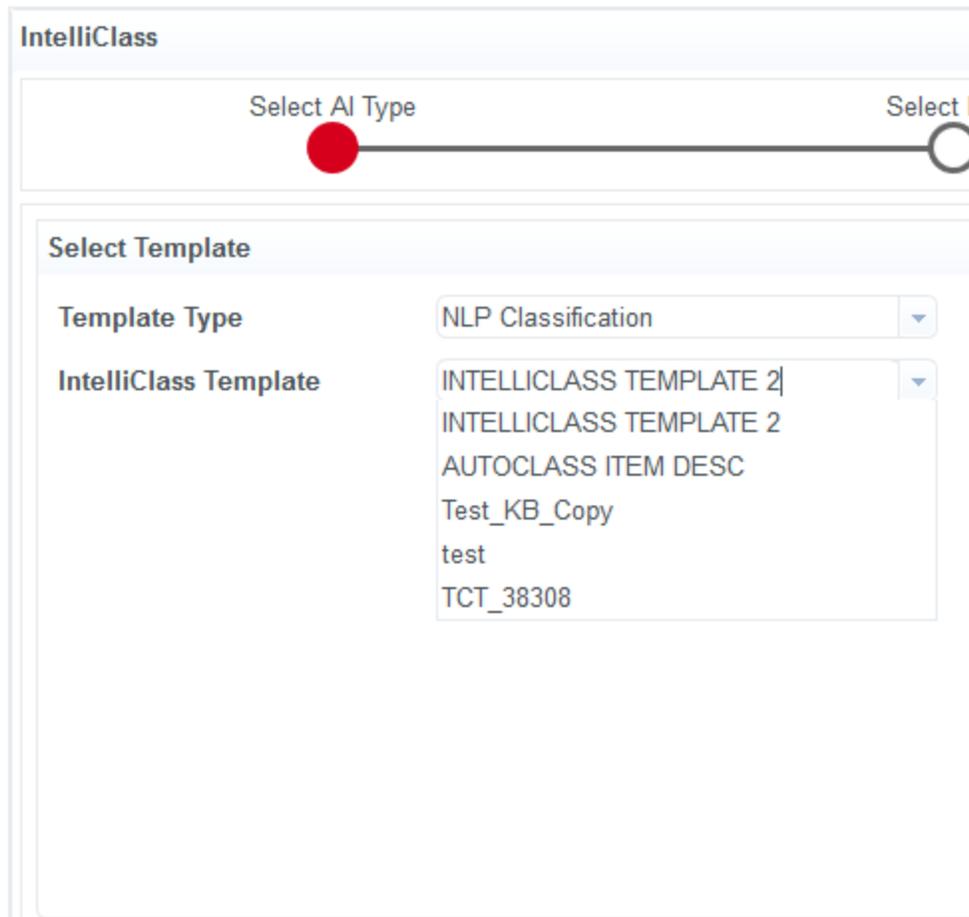
USER IMPACT

- To use this feature, perform the following procedure:
 1. Navigate to **Spend Data Load**  > **IntelliClass**.
 2. You will be taken to the **Select AI Type** screen.

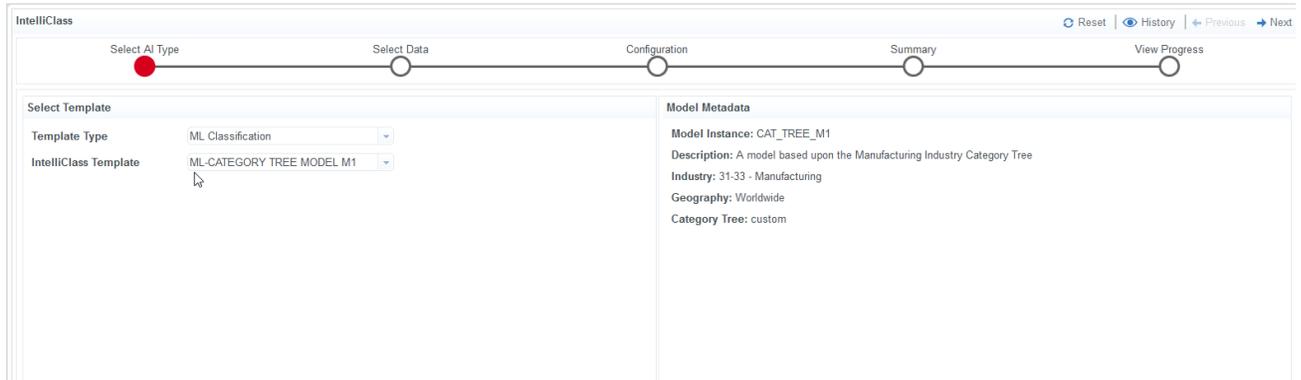
- On the left you will see the **Select Template** section. On the right you will see the **Model Metadata** section, which provides details about the Machine Learning model associated with the selected IntelliClass Template. The Select Template section has two fields, **Template Type** and **IntelliClass Template**. For Template Type, click the drop-down menu and select either **NLP Classification** or **ML Classification**. The default value is NLP Classification.



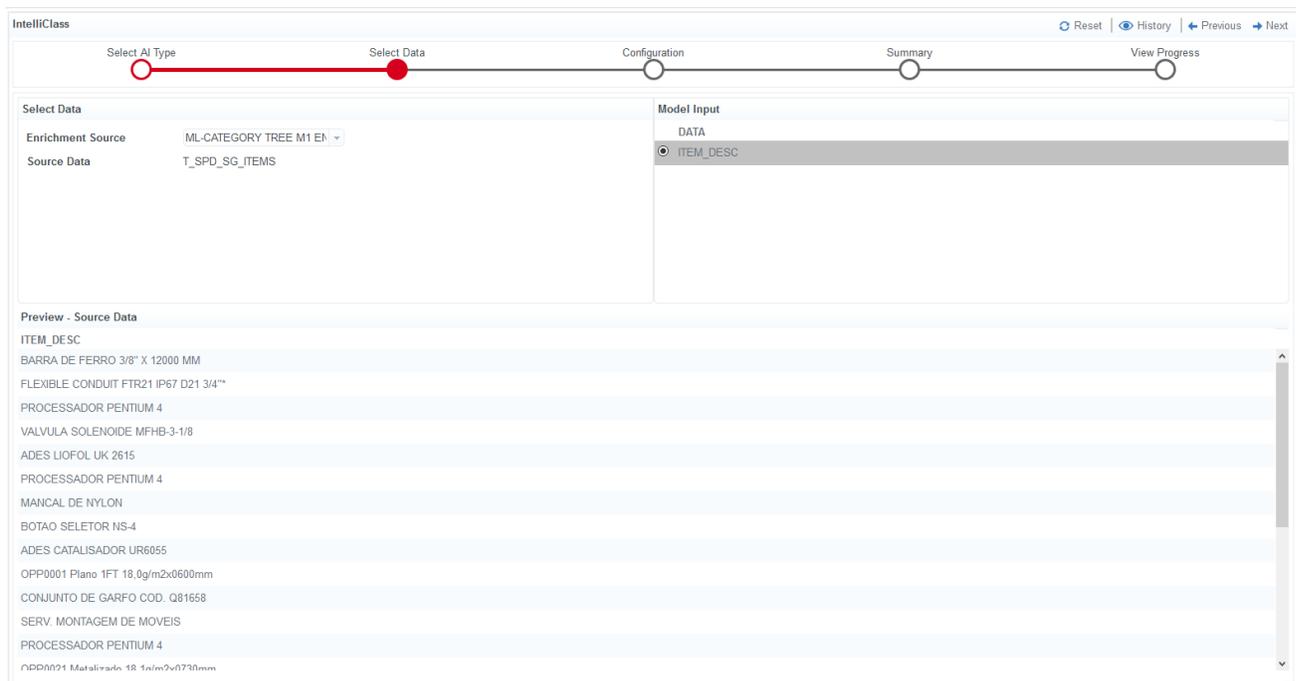
- For the IntelliClass Template field, the available options depend on what you selected for the Template Type field, as each type of AI has different Template options.



- The Model Metadata section describes the data that was used to generate the Machine Learning Model. It provides insight into the industry and geography, as well as a general description, all characteristics of which were selected when the Machine Learning Model (ML Model) was trained/created. The Model Metadata section is only relevant when the ML Classification Template Type is selected.

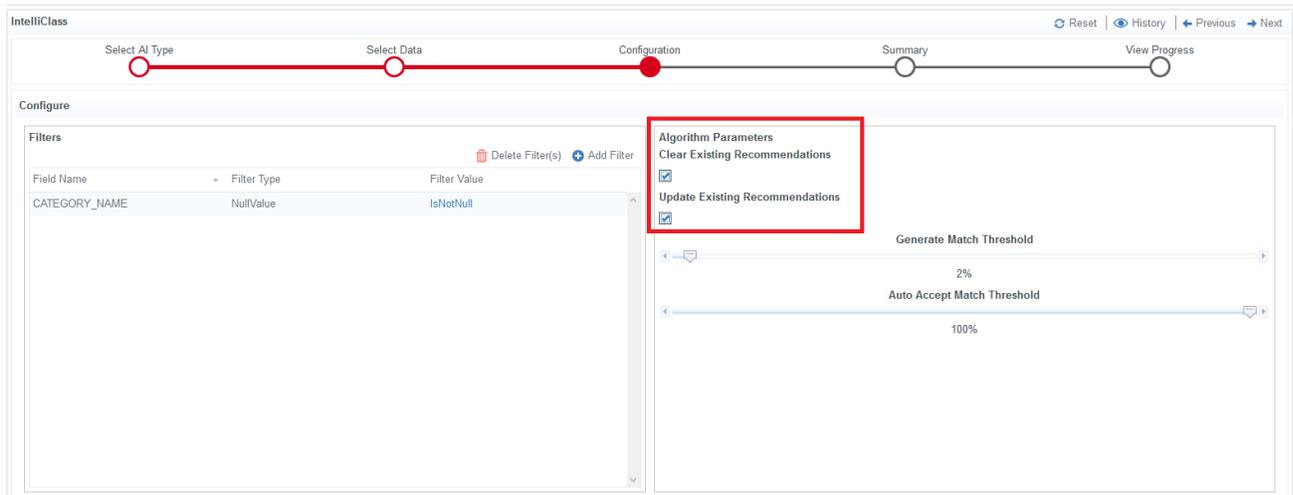


- When you have finished your selections, click the **Next** button in the upper right to proceed to the **Select Data** screen.
- The Select Data screen provides users with the ability to define what data elements from the Source Data set will be matched against the **Trained Model** by allowing the user to select the **Model Input Source** data elements when more than one has been defined in the underlying configuration of the **Enrichment Source**. This screen has not been changed in this release. Complete the Select Data screen as normal. Press the Next button in the upper right to proceed to the **Configuration** screen.

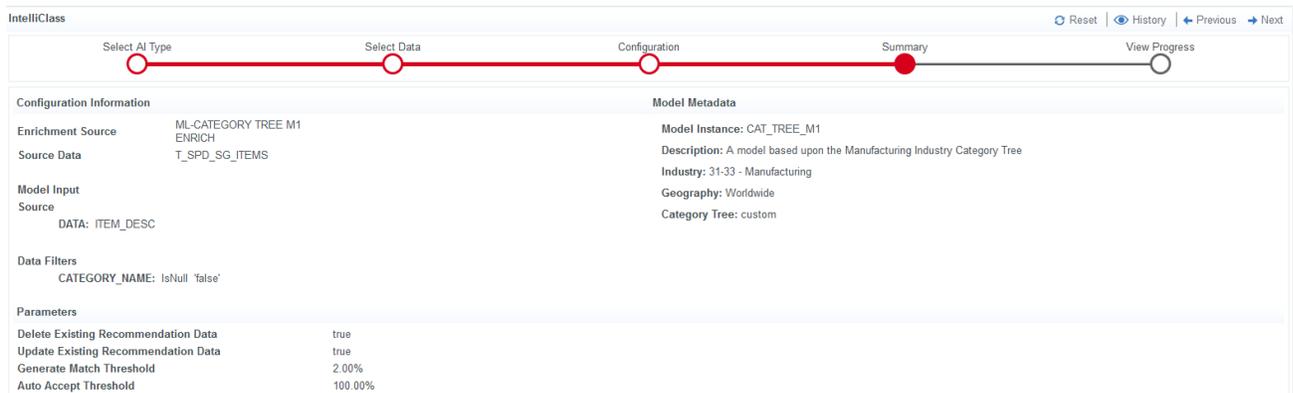


- The configuration screen now has two checkboxes in the **Algorithm Parameters** section: **Clear Existing Recommendations** and **Update Existing Recommendations**. Toggle these check boxes to enable or disable these functions. By default, both are enabled.

- Clear Existing Recommendations: If selected, the system will Remove all existing Recommendations from the system based upon the Enrichment Source selected on the Select Data screen.
- Update Existing Recommendations: If selected, the system will update existing recommendations associated with the Enrichment Source if they exist. Where a recommendation is created that did not previously exist, the system will create a new recommendation.



9. When you have finished your selections, click the Next button in the upper right to proceed to the **Summary** screen, which provides an overview of your current settings. This screen has not been changed in this release. When you are ready, click the Next button to proceed to the **View Progress** screen.



10. To launch the IntelliClass process to match the Source data and Knowledge Base data (whether that is an **NLP** matching process using a Knowledge Base or an **ML** matching process using a Trained Model), press the **Execute** button in the upper right. Your results are displayed in a chart.



ADMINISTRATION IMPACT

This feature does not impact administrators.

THIRD-PARTY INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

New Date Formatting Function During Engine Configuration

In the 20.3 release, date values formatted using the epoch format will be convertible to a timestamp date value during the engine mapping process. This will make it easier for organizations working with epoch values to convert their data to other formats compatible with Spend Analytics+.

Customer Impact

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

USER IMPACT

- Some organizations store dates in epoch format and do not convert them to a date format during the generation of **Spend Data**. This format is based on the number of milliseconds since January 1, 1970 at midnight. When mapping an engine, any date values in this format will automatically be converted to a standard timestamp format.

ADMINISTRATION IMPACT

This feature does not impact administrators.

THIRD-PARTY INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

New Export/Import Feature for Machine Learning Model Instances

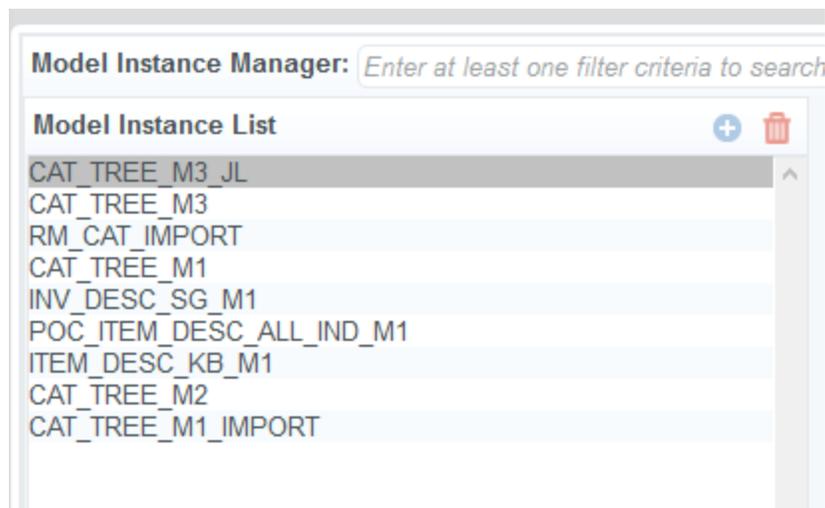
In the 20.3 release, users will be able to export and import trained machine learning models. This will allow trained models from one client to be used in another.

Customer Impact

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

USER IMPACT

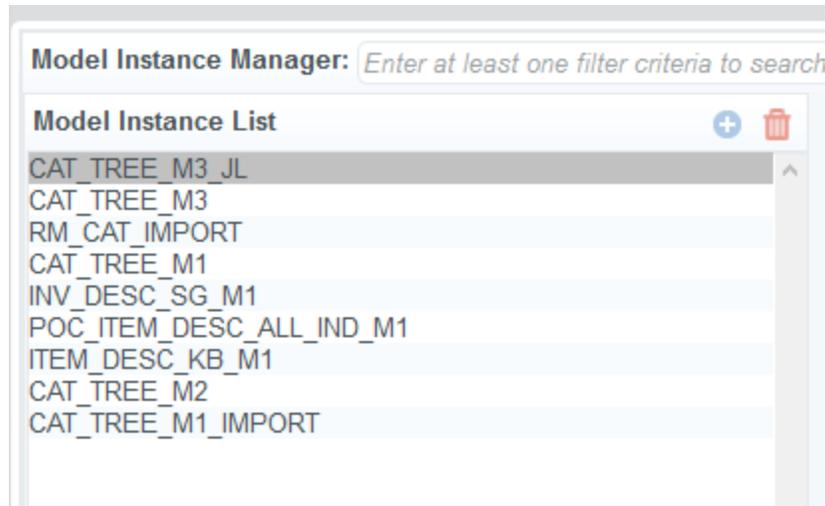
- To export a Trained Model using this feature, perform the following procedure:
 1. Navigate to **Spend Data Load**  > **Model Instance Manager**.
 2. Select the model that you want to export in the left-hand list of Model Instances.



3. Select the  menu option in the top right of the screen.
4. Select the **Export** menu option.



5. Select whether you want to export the Model Instance (Trained Model) to either your local computer or to the client FTP site (where client data files to be loaded are sent).
- To import a Trained Model using this feature, perform the following procedure:
 1. Navigate to **Spend Data Load**  > **Model Instance Manager**.
 2. Select the model that you want to export in the left-hand list of Model Instances.



3. Select the  menu option in the top right of the screen.
4. Select the **Import** menu option.



5. Select whether you want to import the Model Instance (Trained Model) from either your local computer or from the client FTP site (where client data files to be loaded are sent).

ADMINISTRATION IMPACT

- There is an **Instance Parameter** setting which defines the FTP folder when exporting and importing from FTP. This has a default value and should not need to be changed. If this value is changed, it may impact export/import functionality.

THIRD-PARTY INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.