

ONESOURCE Global Trade

Product Release Notes

Release 20.2

Revision history

Name	Date	Version	Summary of changes
Sarah Miles	5/11/2020	20.2	Initial Draft
Sarah Miles	5/11/2020	20.2.1	Update to Release Notes Format

Review history

Reviewer name	Doc version reviewed	Date sent for review	Date review filed	Approved/Rejected (with revisions)
Angela Chamberlain	20.2	4/28/2020	4/28/2020	Approved
Karen Lobdell	20.2	4/28/2020	4/28/2020	Approved
Liz Connell	20.2	4/28/2020	5/11/2020	Approved
Anne Woelke	20.2	4/28/2020	4/28/2020	Approved
Virginia Thompson	20.2	4/28/2020	4/28/2020	Approved
Joe Capobianco	20.2	4/28/2020	4/28/2020	Approved
Rowan Anderson	20.2	4/28/2020	4/28/2020	Approved
Suzanne Offerman	20.2.1	5/11/2020	5/11/2020	Approved (with revisions)



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Chapter 1 Update to Release Notes Format

In an effort to streamline our Release Notes and make it easier for customers to read, we include only those products that will change in this release. All other products will appear in the final chapter: “Products With No Customer-Facing Changes for the Release”.

Chapter 2 Cross Platform Enhancements

ASK THE COMMUNITY

Sunsetting of the “Ask the Community” Feature

Based on the recent customer communication survey results and low usage, we plan to phase out the Ask the Community feature. As we build our strategy to communicate release information, product enhancements, regulatory updates and news to our customers; we will continue to talk to you about your communication needs.

REQUEST MANAGEMENT

Request Management is a cross-platform add-on solution that can be configured to work in conjunction with other ONESOURCE solutions (e.g. Global Classification, Export Management, etc.). Request Management can be configured to serve a multitude of functions, including (but not limited to):

- First Sales
- Arrival Notice to Customs Broker
- Requests to Create Export Shipments
- Supplier/Internal Specification Information
- Requests to Customs Brokers

Auto-Attach Documents to Objects in Database when Accepting a Request

Some customers may have multiple requests at the same time inside Request Management. A new functionality has been added that makes it possible for documents sent in response to a request to automatically be saved to their respective system records (e.g. Product, Export Invoice, etc.). When this occurs, the user will be asked for confirmation as to whether or not the documents should be added to the system records.

When utilized, this function should reduce the amount of manual effort users had to make in the past to attach documents.

Datatype Validation for Response Submitted by Responder

Prior to the 20.2 Release, user responses were accepted by default with the system not checking the datatype. An update was made in this release that improves the validation of requests by adding datatype validations to user responses. This update will improve data accuracy and drastically reduce the risk of bad data being added to the system records.

Creating Multiple Requests on Excel Upload

Prior to the 20.2 Release, using the Excel upload feature to create requests meant users had to upload multiple Excel files to create multiple requests. This update makes it possible to create multiple requests from one Excel file. This update should reduce the amount of effort users had to make in the past to generate requests via Excel.

Chapter 3 Global Trade Content

Global Trade Content is a comprehensive collection of global trade regulations and regulatory knowledge for 200+ countries and territories. This solution organizes and maintains updated Customs data from around the globe, regardless of location or language. This information includes (but is not limited to):

- Tariff Schedules
- Duty Rates (Preferential, Retaliatory, ADD/CVD, etc.)
- Other Charges (VAT/Excise/Country Specific)
- FTA Rules of Origin
- Commercial Documents
- Binding Rulings
- World Customs Organization (WCO) Explanatory Notes
- Export Control and Munitions Lists
- Denied Party Screening

ANALYZER

Phase 1 & 2 Portuguese Translation Project

The Global Trade Content translation project is an ongoing initiative to provide full-screen translations within Global Trade Content. This current project includes Portuguese translations across all Global Trade Content. The completed portions are within the “Tariff Analyzer” and “Global Tariff” screens:

- Content drop-down menu names, Analyzer drop-down included
- All the tabs in the “Global Tariffs” landing screen and the “Advanced Search” functionality
- Global Tariffs mouse-over fields (i.e. when users hover over any hyperlinks or text boxes on the screen)
- All country and tariff schedule names

This project enables users to not only read parts of the global trade offerings in a different language; but the entire screen (including hover-over effects) in Portuguese. This enhancement will be available for anyone with a Global Trade Content subscription when switching the page language to Portuguese. Please note that this is a partial enhancement at this time and will be continuously worked on over the next few releases.

GLOBAL TARIFFS

Extract Functionality Added to Tabs in the HS Detail and ECN Detail Screens

Users now have the ability to extract the contents of the grids into a Microsoft Excel spreadsheet in several of the tabs on the “ECN Detail” and “HS Detail” screens. Adding the extract functionality to these screens allows users to download and extract specific data they are interested in to Microsoft Excel.

On the “ECN Details” (“ECN/Dual Use List Quick Lookup”) tab, the following grids can be extracted to Microsoft Excel:

- Related Controls
- License Exceptions
- Related Notes
- Related Definitions
- Export Related Controls

On the “HS Detail” (“Global Tariffs Quick Lookup”) screen, the following tabs can be extracted to Microsoft Excel:

- Controls
- Rulings
- Notes

This update will be provided to all users subscribed to Global Trade Content as part of the 20.2 Release.



Search Icons Added to the Global Tariff Landing Screen

New search icons have been added to the “Global Tariffs” landing screen. These icons give the user quick, easy, one-click access to their desired tab for more information about their selected tariff. The icons will display next to the HS Number in the grid for quick access to:

- Controls
- Rulings
- WCO Notes
- Duty

Depending on the customer’s subscription and what types of content are applicable to the selected HS Number, the buttons the user may see will vary. This update will be provided to all users subscribed to Global Trade Content as part of the 20.2 Release.

Preferential Duty Rates and Quotas Added to the Customize Search.

It is now possible to view the preferential and quota duty rates of a country in the grid on the “Global Tariffs” screen. In the “Customize Search” option, a checkbox has been added so the user can choose whether or not to view/select these rates for the currently selected country.

If the user clicks on the checkbox, they will be able to view available rates for that country and choose which ones they would like to view within the grid. This change in the click functionality pulls data when the checkbox is selected and hence optimizes the screen functionalities.

This update will be provided to all users subscribed to Global Trade Content as part of the 20.2 Release.



Chapter 4 Duty Deferral Programs

The ONESOURCE Global Trade Duty Deferral solutions are software solutions developed by a team of technology and international trade experts. These products combine robust functionality with state-of-the-art technology to address the needs of zone operators in all industries throughout the United States, Mexico, European Union, and Asia-Pacific.

ONESOURCE Global Trade has software for US Foreign-Trade Zones, Mexican Maquiladoras (IMMEX), and European Union Customs Warehouse/Processing under Customs Control.

FOREIGN-TRADE ZONE MANAGEMENT (DISCRETE)

The purpose of the Foreign-Trade Zone (FTZ) Management system is to avoid, minimize, and defer duty liability while remaining in compliance with United States Customs regulations. The system will automate the majority of the Foreign-Trade Zone tracking processes in order to reduce the amount of time spent manually maintaining inventory records.

Foreign-Trade Zone (FTZ) Management interfaces with the customer's inventory management system (IMS) to pull and process transactions to create customized reports in accordance with United States Customs.

Validation Updates for PreReceipts in FTZ

There was an update made to the handling of PreReceipts in FTZ to consolidate errors. This change eliminates duplicate messages, which should greatly reduce the number of errors a user will need to manage if a PreReceipt contains errors.

This change will be rolled out to all users subscribed to the PreReceipts module of the ONESOURCE Foreign-Trade Zone Management solution as part of the 20.2 Release.

Updates to the Product History Report

The "Product Search" function was updated on the Product History Report to increase the flexibility of user data. This update should make it even easier to search for and identify products the user wants to research.

This change will be rolled out to all ONESOURCE Foreign-Trade Management users as part of the 20.2 Release.

Updates to e214 Process for ACE Filings

CBP has updated the e214 process that will go into production later this year. Work has begun on the ONESOURCE Global Trade side to accommodate this process and will be available when CBP updates into production.

Once these updates become available, users will be able to file with the updated data and remain in compliance. As our team learns more about these changes, we will be communicating those changes to our customers. Currently, CBP has a Production Deployment scheduled for Phase 2 Drop 2 of the admissions schedule (June 2020). The ONESOURCE Global Trade team is having ongoing conversations with CBP on the topic. As more information becomes available, we will share.

FTZ Entries Can Push to GTV Using SKU Level Detail

The ONESOURCE Global Trade team has integrated the FTZ entry filing process to our Global Trade Visibility (GTV) tool at a SKU level. ONESOURCE GTV users now have the ability to drill down their zone entries to a SKU level. This update provides GTV users with more information and insight into their entry filings.

This change will be rolled out to all users subscribed to both ONESOURCE Global Trade Visibility and ONESOURCE Foreign-Trade Management users as part of the 20.2 Release.

DRAWBACK

The ONESOURCE Global Trade Drawback solution is used for processing entries into the United States and exports out of the United States in order to determine the available duty to claim back from Customs while in compliance with United States Customs regulations.

In order to reduce the amount of time spent manually maintaining entry and export records, this system automates the majority of the drawback tracking processes, allowing users to focus on claim creation.

Our Drawback solution interfaces with the user company's inventory management system (IMS) to pull transactions. From there, it processes the transactions to create customized reports in accordance with United States Customs regulations.

Update to Drawback CBP Form 7553

On 11/14/2019; CBP published CSMS #40637910, which contained updates to Drawback form 7553. In an effort to maintain compliance with these changes, updates were made to the ONESOURCE Drawback 7553 form.

This change will be rolled out to all ONESOURCE Drawback users as part of the 20.2 Release.



IMMEX

The purpose of the IMMEX/Maquila solution is to avoid, minimize, and defer the payment of duties while complying and adhering to Mexican Customs regulations. The system:

1. Automates most of the follow-up processes for the maquiladora in order, thereby reducing the amount of time spent manually maintaining inventory records
2. Integrates with the inventory management system (IMS) to transmit information and process transactions, thereby creating customized reports under the Mexican Customs regulations

Added Optional Consolidated Partner Data Generation on IMMEX Reports

A new consolidated partner feature is now configurable for ONESOURCE IMMEX. If enabled; a drop-down list will appear on some IMMEX reports screens, allowing the user to select both parent and child partners/plants for the report.

This feature is most beneficial for users who have multiple plants with the same RFC, as the feature can be used to consolidate all plants data into a single report result rather than multiple reports. In this scenario, users can generate the complete report and present all information at the RFC level to authorities, as well as manage the whole process (including all working plants).

To use this feature, the user will enter the report screen and select the main partner first. From there, it will be possible to select a child partner. If the user does not follow this additional step and simply selects a particular partner on the list; the report will only return the data for the selected partner (no child partners), just as it would if the feature were not enabled.

If enabled, the following IMMEX reports will include this feature as part of the 20.2 Release:

- Reports:
 - Component Balance Audit
 - Finished Goods Balance Audit
 - Annual Report
- Pedimento Reports:
 - Pedimento Balance
 - Pedimento Summary
 - Pedimento History
 - Allocated Import Pedimento
 - Allocated Export Pedimento
- Legal & Audit Reports:
 - Annex 31-Balances
 - Annex 31-Discharges
- INEGI
- Tools
- Data Stage

This feature is configurable, meaning it can be enabled or disabled. If you are interested in enabling this feature in your ONESOURCE IMMEX system, please reach out to your Thomson Reuters professional services representative.

Added Configurable Sorting Criteria for Two Invoicing Reports (MX Fixed Asset Import Invoice, MX Change of Regime Invoice)

A new configurable element has been added to ONESOURCE IMMEX. If activated, the user will be able to sort criteria for the “MX Fixed Asset Import Invoice” and “MX Change of Regime Invoice” reports.

Both of these reports are MX Dynamic Documents, which means the Thomson Reuters implementation team can set up the fields by which the data can be sorted. Using the same sorting criteria on both reports makes it easier to audit data between the two reports. The feature also improves the broker process, since this defines a standard sort order by which the information will be received.

If your IMMEX system has been configured to include the “MX Document Rules” screen in the “Maintenance” menu, then these reports can be located at IMMEX -> Invoice Processing -> Work with Invoice -> Select an Invoice -> On Context Menu -> Click on Print.

This feature is configurable, meaning it can be enabled or disabled. If you are interested in enabling this feature in your ONESOURCE IMMEX system, please reach out to your Thomson Reuters professional services representative.

Changed Packing List Report to Adjust Calculation for Fields NetWeight and GrossWeight

In the “Packing List Report” screen, the “NetWeight” and “GrossWeight” fields were changed to use the Transaction Quantity value multiplied by the Weight value. This change allows these fields to be properly calculated for the “Unit of Measure for Weight” section of an invoice and eliminates any potential discrepancies that could have occurred during a manual entry.

If your IMMEX system has been configured to include the “MX Document Rules” screen in the “Maintenance” menu, then this report can be located at IMMEX -> Invoice Processing -> Work with Invoice -> Select an Invoice -> On Context Menu -> Click on Print -> "Packing List Spanish"

Performance Improvement for IMMEX Component Balance Audit Report

During the 20.2 Release, the ONESOURCE IMMEX team made some performance improvements (an upgrade of the populate data query function) to the “IMMEX Component Balance Audit Report” screen. These updates were added to use the latest function provided by the ONESOURCE Foreign-Trade Zone Management solution, as well as to improve the report’s performance.

This update means IMMEX users should be able to generate their reports faster, thereby improving the user experience.

This report is located at IMMEX -> Reports -> Component Balance Audit and is available for all ONESOURCE IMMEX users.

PROCESSING TRADE REGIMES (CHINA)

The ONESOURCE Global Trade Processing Trade Regimes (PTR) solution assists companies with reconciling China-bonded inventory and managing additional requirements necessary to maintain compliance. The system replaces the manual and time-consuming import/export process with a robust, on-demand solution designed to adapt to various handbooks and bonded zones.

This system interfaces with a customer’s ERP system or inventory management system (IMS) to allow companies to reconcile their transactions to their China Customs Handbook and to integrate their Customs Clearance Sheets (CCS) with their Handbook Registrations and ERP transactions. This will increase control and improve visibility of the Processing Trade Regime.

For more information on Processing Trade Regimes, please refer to the China Customs regulations and documents provided by the [General Administration of Customs of the People’s Republic of China](#).

China Connectivity to Single Window

In order to perform direct filing with China customs, ONESOURCE PTR customers will need to be able to connect through the single window system. The 20.2 Release was used to provide connectivity and support the following processes:

1. Import and export customs declaration for general trade
2. Entry and exit customs declaration for process trade regime (“PTR”)
3. Handbook and bills of material (BOM) registration for PTR

ONESOURCE PTR generates XML files which will be sent to the single window. In addition, foundation logic has been added to handle customs responses. This customs response handling will be further enhanced in the 20.3 Release.

Being able to generate XML files from ONESOURCE—rather than manually entering the information into the China customs single window—should drastically reduce the amount of time the user spends with direct filing. In addition, the system maintains a submission history, which provides additional benefit.

National Single Window Connectivity - Phase 2

Customers interested in direct filing through China will need to connect to China Customs through a single-window system. In the 20.2 Release, the ONESOURCE team expanded the coverage of China connectivity in the following ways:

1. New transport history feature to capture and display China customs response for all connectivity built
2. Handbook registration enhancements to allow users to register IM, PC and BOM for PTR
3. New handbook reconciliation feature to support bi-annual handbook reconciliation submission to China customs
4. New real-time component consumption tracking report to monitor component balance to support users to prepare customs reconciliation

These updates to the platform enable users to use ONESOURCE PTR to submit and receive responses from China single window, covering major end-to-end processes for both general trade and PTR.

Chapter 5 Global Trade Management (GTM)

AUTOMATED BROKER INTERFACE (ABI)

The Automated Broker Interface (ABI) is an interface for communicating with CBP's Automated Commercial System (ACS) and Automated Commercial Environment (ACE) systems that permits qualified participants to electronically file required import data with CBP. ABI is a voluntary program available to:

- Brokers
- Importers
- Carriers
- Port Authorities
- Independent Service Centers

ABI expedites the release of merchandise for the trade community. Entry summaries are electronically transmitted, validated, confirmed, corrected, and paid. Administrative messages keep participants informed of all current information and issues. Participants can query manufacturer information and entry/entry summary processing statuses.

ABI allows filers to pay multiple entries with one payment transaction through statement processing. ABI filers can also pay CBP duties, fees, and taxes electronically through the Automated Clearinghouse (ACH).

Retaliatory Updates to Meet Regulatory Changes Related to 301 Tariffs and Exclusions

Many updates were released by the US government regarding retaliatory tariffs and exclusions. Chapter 99 and exclusions were updated as required by their effective dates. These updates ensure that users utilize retaliatory tariff changes appropriately and remain compliant. These changes went out to all self-filing ONESOURCE FTZ and ONESOURCE ABI customers in alignment with the enforcement date.

Regulatory Updates for Fish and Wildlife Reporting

CBP released multiple changes to Fish and Wildlife Services (FWS) in anticipation of their mandatory filing later in the year. Updates were made to accommodate these changes for the 04/04/2020 pilot. This means that users will be able to file FWS data and remain in compliance with the upcoming regulatory changes.

These changes were pushed to all self-filing ONESOURCE Foreign-Trade Zone Management and ONESOURCE ABI customers in alignment with the enforcement date.

US-Japan Trade Agreement

On 12/31/2019, CBP published CSMS #41149692 in regards to the US-Japan Trade Agreement. Updates were made to accommodate the agreement which went into effect on 01/01/2020. This update makes it possible for users to take advantage of the new US-Japan Trade Agreement.

These changes were pushed to all self-filing ONESOURCE Foreign-Trade Zone Management and ONESOURCE ABI customers in alignment with the enforcement date.

CBP Updates – Negating Payments to ACE

CBP recently updated payments to ACE. They are now allowing the negation of payments on the same day up until midnight in the Eastern Time Zone. In the 20.2 Release, the following updates were made to ONESOURCE ABI:

- All payments in ONESOURCE are made utilizing the Eastern Standard Time Zone, regardless of location. This ensures that the user is negating payments using the same time zone as CBP.
- Additional updates were made to the UI when payments are rejected by CBP within the same day the payment was made. This update provides the user more flexibility, making it easier to manage the new negate payment feature.

Enhanced Validation Message for Missing Manufacturer ID Code

In the 20.2 Release, the validation messages were updated to include the Manufacturer that is missing in maintenance data. This should make it easier to identify which MID code is missing data. If this error appears, the Maintenance screens can be used to resolve the issue.



Reconciliation Date Updates, Process, and Performance Improvements

In the 20.2 Release, multiple updates were made for the Reconciliation portion of the ONESOURCE ABI product. These updates include:

- Improved accommodation of the various dates for the different types of reconciliations filed and when the data becomes available in reconciliation. This change should make it easier for users to manage the needed data and filing times in this section of the product.
- Improved performance and faster processing times.

Post Summary Correction Reason Codes for Multi-HTS Tariff Lines

In the 20.2 Release, updates were made to the handling of Reason Codes involving Multi-HTS tariff lines when filing Post Summary Corrections. This change will make it much easier for users to select the correct lines for reporting.

Updates to Unit of Measure Validations for Tariff Lines with Chapter 98

Changes were made to the handling of Unit of Measure for Chapter 98. With this update, the system will match the Unit of Measure to the Unit of Measure provided by ONESOURCE Global Trade Content. This update not only keeps the data in line, but also reduces the number of validation errors the user may experience when reporting Chapter 98.

ADD and CVD Updates When Transmitting to CBP

In the 20.2 Release, some standardization efforts were made for certain tables. Standardizing these tables between products allows for better handling of anti-dumping duties (ADD) and countervailing duties (CVD) data when transmitting to CBP.

DENIED PARTY SCREENING

ONESOURCE Global Trade Denied Party Screening (DPS) is a comprehensive global referencing tool that simultaneously scans multiple control lists from all around the world. This screening process searches for denied persons, groups, organizations, and entities plus embargoed or sanctioned countries all within a single, intuitive search.

By comparing these denied parties to possible supply chain partners (such as customers or suppliers) before entering into a business relationship, users are able to minimize the significant risk that comes from doing business with a denied entity or in a sanctioned/embargoed country or region.

Addition of Turkish Entity Name Mapping Data

All Denied Entities located in Turkey on the 200+ lists sourced and maintained by the ONESOURCE Global Trade Content team have had their names mapped into Turkish to be held as a Turkish AKA, even if the original agency source published the name in English or some other language.

For customers who enter the names of their own supply chain partners in other languages, the likelihood of finding accurate hits is increased when the name being screened is in the same language. With these additional “translations” (which in some cases are not actual translations, but registered business names) into Turkish entered into the system as AKAs for the denied entities, the search engine will screen against both the language of the original source and Turkish in order to provide the highest likelihood of success in finding an accurate hit if one should be returned.

The new Turkish data will be available on all entities located in Turkey (almost 1,500 total companies and people) by default for all DPS customers as of the start of the 20.2 Release.

ENTRY VERIFICATION

ONESOURCE Global Trade Entry Verification is designed to support a closed-loop entry review process and addresses the challenges of auditing entries on a consistent basis. When communications between the importer and broker break down, the information stored in the broker's brokerage system may not match the information stored in the user's system, thereby creating a discrepancy.

Entry Verification compares entry data against other applicable data residing in the system, such as:

- Classification data stored in the Global Classification solution
- Quantity and valuation in either a purchase order or commercial invoice

If Global Classification is deployed as part of an integrated solution, it is possible to send parts data files nightly to a Customs broker as part of the pre-entry process. By adding this step to the "closed loop" process, the user gains an increased level of confidence in knowing the Customs broker consistently uses the most up-to-date classification data during the entry process.

Multiple Random Audits At One Time

The Random Audit functionality of Entry Verification (EV) has been enhanced to allow the user to conduct more than one random audit at the same time for a given country profile.

Random audits are a best practice for a robust import compliance operation to show that an importer is exercising reasonable care with regards to importing goods into the United States. It also supports the concept of self-testing on areas of risk for programs such as the US CBP Importer Self-Assessment (ISA) program.

The ONESOURCE Entry Verification solution now provides the ability for users to conduct multiple random audits at the same time, based on varying risk parameters (e.g., specific HTS number, MOT or Broker). Additionally, the auditing of entries can be assigned to specific individuals as necessary based on responsibilities or areas of expertise. Combined with standard ongoing validations of 100% of your entries, the EV solution provides an effective method for audit purposes.



FREE TRADE AGREEMENT MANAGEMENT

As a web-based solution, the ONESOURCE Global Trade Free Trade Agreement (FTA) Management software allows Importers, Manufacturers, and Exporters to significantly reduce the time and effort required to manage any Free Trade Agreement (FTA) through its entire lifecycle. The system can be used to solicit Suppliers for a Preferential Certificate of Origin, to determine product eligibility based on the rules of origin, or to generate Certificates of Origin.

FTA Management stores Supplier-provided supporting documentation, Bill of Material (BOM) analysis results, and generated Preferential Certificates of Origin in a central location to support paperless recordkeeping.

With the FTA Management software in place, users can significantly reduce the time needed to qualify goods for FTAs by automating the Supplier solicitation, BOM analysis, and certificate generation processes.

Additional benefits include:

- Managing FTAs from one integrated system
- Automating and centrally managing supplier solicitations
- Using dedicated screens for suppliers to create Certificates of Origin
- Qualifying Bills of Material (BOMs) against multiple FTAs
- Automating the generation of Customer Certificates of Origin
- Managing documentation supporting FTA claims in one central location
- Utilizing integrated Global Trade Content that provides up-to-date rules of origin, preferential duty rates, and available FTAs

USMCA Automotive

Accumulation within the USMCA agreement allows the producer to count originating content from the agreement region where the material is non-originating but is produced within the United States, Canada, or Mexico.

This functionality allows the user to solicit within the tool and count a portion of the material toward the regional value content (RVC) calculation. The accumulation logic allows the user to count a portion of non-originating materials towards the finished goods RVC.

Averaging

This feature expanded the functionality of the Averaging module. Enhancements standardized the tool that allows the user to setup and adjust averaging categories and see visibility into the parts that make up the category.

Averaging allows automotive customers to group certain goods together based on category defined in the regulations and allow a larger number of finished goods to qualify for the agreement. It creates qualification results for the category while still allowing the user to see the individual qualification results. This will allow the user to analyze the category so optimal qualification can be achieved.

BOM Worksheet Updates

The Specific Process (SP) criterion is one type of origin criterion commonly used standalone or in combination with other origin criteria such as tariff shift or RVC rules. In the 20.2 release, ONESOURCE FTA further enhanced its capability to handle SP criterion and combination rules. Users can set which products meets SP criterion and the system can further perform origin determination with combination rules automatically and review the origin determination results on standard report such as BOM analysis worksheet and lookup reports.

This enhancement allows users to perform origin calculation with complex rules. In addition, users can monitor how their products are qualified with various reports and more effectively develop origin strategy to improve qualification results.

Mass BOM Analysis Filtering

In the 20.2 Release, the BOM filtering functionality in Mass BOM Analysis was enhanced to include “Contains” and “Starts With” options.

GLOBAL CLASSIFICATION

ONESOURCE Global Classification makes it possible for companies to collect, store, manage, and track all classification data in an easily accessible web-based database. The system can be used to:

- Access global and country-specific classification information using a web-based solution
- Store and manage all classification data fields regardless of industry, business needs, or regulatory requirements
- Setup an automated approval process to ensure data integrity
- Enhance communication to trading partners by providing multi-language capabilities
- Establish company standards to ensure there are no data management issues
- Eliminate duplicate data entry through interfaces with inventory processing systems
- Access the classification interface via the Global Trade Content solution

Enhanced GC Push to IM Visibility for Null Value Products

In order to maintain the Global Classification (GC) database and FTZ/IMMEX Item Master (IM) in sync effectively, various logic rules are in place when the products in GC are pushed to IM each night. If product records are void in key data fields (such as Product Number), the push will fail to ensure that those bad records are not sent to the Item Master database. Situations of this type require assistance from the Support team to resolve.

Various enhancements have been added into Global Classification in 20.2 to assist our Support team in locating the specific records, which will help them to research and solve these types of GC Push to IM cases faster.

Smart HS Classification Certificate

The “Smart HS” tool now generates a Classification Certificate to provide users with valuable documentation of the search parameters, classification returned, and rationale for the classification chosen by the Smart HS Artificial Intelligence-based engine.

When Smart HS is used via the “Edit Classification” screen, the Certificate will be automatically saved to the product record in Global Classification when the classification is saved. If Smart HS is used on the Ad Hoc screen, users may save the Certificate as a pdf file locally.

This Certificate (regardless of which location the user generates it from) can be used by the trade compliance team to provide documentation in the case of an audit to validate why classification decisions were made via a consistent methodology.

Customers already subscribed to Smart HS will see the Classification Certificate enabled by default with the 20.2 release. If you are interested in learning more about Smart HS, please contact your System Administrator.

Smart HS Ad Hoc Screen Enhancements

The “Smart HS” functionality can be accessed two ways: as part of a user's classification workflow process linked from the “Edit Classification” screen; or from a stand-alone Ad Hoc screen, which is not tied to any particular product or country of import.

In the 20.2 release, the Ad Hoc screen is being enhanced to match the look and functionality of the Edit Classification version. Specific changes include:

- Cleaner UI, matching the look of the rest of the ONESOURCE Global Trade platform
- Fully-qualified tariff numbers returned in a grid from ONESOURCE Global Trade Content
- Links to complete Global Tariff Details for each HS Number returned for more complete research
- Tab with Binding Rulings available in Global Trade Content to search on

Users of the Ad Hoc Smart HS screen will see these changes automatically within the 20.2 release. If you are currently using only the “Edit Classification” version and would like the Ad Hoc screen added to your menu, or if you would like more information about subscribing to Smart HS, please contact your System Administrator.

"Not Your Item?" Enhancement to Smart HS

Sometimes the "Smart HS" AI classification engine can interpret a product description incorrectly and, for example, switch what is being classified with a word meant to describe it. If one submits "shoes leather," for example, Smart HS will start to prompt questions to classify leather. But if the user had meant to enter "shoes, leather" (intending to classify shoes), the questions would be very different. Currently, the user would need to notice that the questions being prompted are not correct and change the description.

In 20.2, the "Not Your Item?" drop-down will surface any time the AI engine returns the possibility of more than one item that the description might be classifying. In this case, the screen would display "Leather" as the item being classified, but the user would be able to see "Shoe" in the drop-down list to choose from in order to prompt Smart HS to start generating questions that are more appropriate for shoes to be classified.

By providing users with a way to see what type of item is being classified and a quick way to change that type, the accuracy and speed of classifications with Smart HS will increase.

The "Not Your Item?" capability will be enabled by default for all customers using Smart HS with the 20.2 release.

Improved Edit Classification Page Load Time Through Updated Search Architecture

As a part of our effort to focus on improved system performance and stability in 2020, the Global Classification team examined ways in which we could realize screen load time improvements on the "Edit Classification" screen. After doing some analysis of the architecture of the page; we identified that, particularly for customers with large numbers of products in their database, a significant percent of the load time was due to the way in which the searching functionality at the top of the screen was designed and configured.

In order to realize performance improvement on screen load time, the original "Prev/Next" links have been hidden with the 20.2 release. Users can still navigate from product to product on the "Edit Classification" screen by searching within a particular field for a specific value as before. While the performance changes will vary from customer to customer; in some tests with high product counts, we saw improvements of over 80% of the screen load time. Therefore, it is our expectation that many customers will experience some level of improvement.

The "Prev/Next" links will be hidden by default for all customers effective with the 20.2 release. If you decide that you would like them re-enabled, please reach out to your System Administrator.

Chapter 6 Products With No Customer-Facing Changes for the Release

The following ONESOURCE Global Trade products had no customer-facing changes for the 20.2 Release:

- **Cross Platform Enhancements:**
 - Business Process Management (BPM)
 - Report Builder
 - Decision Tree
- **Global Trade Content**
 - Content Extracts
 - ECN/Munitions Lists
 - WCO Notes
- **Duty Deferral Programs**
 - Foreign-Trade Zone Management – Petroleum
 - EU Customs Regimes
- **Global Trade Management**
 - Export Management
 - Import Management
 - Global Trade Visibility
 - Importer Security Filing
 - Supply Chain Compliance