

ONESOURCE Global Trade

Product Release Notes

Release 21.4

Revision history

Name	Date	Version	Summary of changes
Documentation Team	10/18/2021	21.4	Initial Draft
Documentation Team	10/20/2021	21.4	Final Draft

Review history

Reviewer name	Doc version reviewed	Date sent for review	Date review filed	Approved/Rejected (with revisions)
Anne Woelke	21.4	10/20/2021		
Alison Camargo	21.4	10/20/2021		
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Chapter 1 Cross-Platform Enhancements

PLATFORM

Migration to AWS Data Centers

What It Is

As part of the strategy to grow our platform to provide new and innovative solutions, in 2020 ONESOURCE Global Trade began supporting customers in AWS with over 150+ partners currently operating in AWS in both the US and Europe.

To continue this effort, ONESOURCE Global Trade customers who are currently hosted in a legacy Integration Point data centers will be migrated to AWS targeting the same region as their current hosting. Early pilot migration customers will begin as early as November 2021 and will continue over the next 12-18 months. These early pilot migration customers will be contacted directly by their Account Managers, with further communication around migration coming in the weeks and months ahead for all remaining customers. Please be on the lookout for emails, release notes, release videos, and system messages for more information.

Benefit To You

Hosting the ONESOURCE Global Trade application on AWS will provide the base for many wonderful opportunities for us to enhance our application through natively available cloud capabilities. Immediate benefits that we expect include greater flexibility to support scalability and stability, while also increasing our application security posture. Future benefits will be in the form of new innovations and greater integrations with other TR products and partners.

Enhancements in Saved Query

What It Is

Saved Query has received several enhancements to increase performance and stability.

- **Queries with Large results** will run much faster. The page now won't wait for all data to returned before showing those on screen (e.g: thousands of records). Note: this is an automatic performance improvement applied by the application to certain query types and some limitations apply depending on the structure and complexity of the existing queries.
- **Data Extraction** speed and stability have been improved during the extraction process. The following file formats and rules are applied:
 - **Single excel worksheet**
 - XLS or XLSX: Used for up to 65K records. XLS is the default extension used unless XLSX is explicitly defined when the query was built by the Implementation specialist.
 - CSV: Used when above 65K and up to 1 Million records.
 - **Multiple excel worksheets**
 - XLS or XLSX: XLS is the default extension used unless XLSX is explicitly defined when the query was built. Note that if results are expected to be greater than 65K, XLSX should be specified.
- A **Top limit of 1 Million records** for data extraction has been implemented. Saved Query was not designed to perform massive data extractions and it can compromise application stability and pose a risk to the customer and other customers accessing the application. In case you have any Query that you were used to perform larger extractions than 1M records, please contact Customer Support to understand what are the options available for your customized process.

Benefit To You

Faster and more stable usage of Saved Query.

No Access Page (403)

What It Is

The old page stating that the user does not have access to a certain application page (with a hand palm and 403 code) has been replaced by an orange pop up at the top right corner. The new pop also includes the partner name (environment name) to facilitate user understanding. User is then redirected to the Home Page.

Benefit To You

Easier understanding by end users when they lack access to a certain page, solving a previous challenge when the page was misleading users to think that was actually an application error, when it is not.

Bug: Misleading Page Tile in the Browser Tab

What It Is

A misleading or out of date page title in the browser tab and mouse over tooltip containing the current page name has been fixed.

Benefit To You

Faster understanding current page that the user is working on by looking at the Browser tab.

Bug: Changing User Default Language/Culture would not reflect on certain pages**What It Is**

An Intermittent issue was not reflecting user's default culture changes on all application pages after logoff and login.

Benefit To You

Correct selected user language when using the application.

REPORT BUILDER**Minor Usability Enhancements****What it is:**

A horizontal scrollbar was added to the field list pane (on the left hand side of the screen) so that fields with longer names can be more easily viewed by users.

Benefit to you:

Users of Report Builder can better understand the fields they are selecting from to add to a report, and potentially avoid the situation where they are adding a field they didn't intend to because they didn't have visibility to the entire field name. Previously users had to use their browser's find function, or zoom functions, to gain better visibility into fields with longer names.

Chapter 2 ERP Integrations

Long Term Enhancements**What It Is**

As part of the 21.4 Release, IPAPI Long Term Enhancements have been placed under POC status and implemented.

Benefit To You

With these implementations, IPAPI related strategic improvements could be implemented, in order to have IPAPI more flexible and overall, more efficient.

Workflow Mapping Runner Re-Architecture**What It Is**

As part of the 21.4 Release, Workflow Mapping Runner Re-Architecture have been proposed and implemented.

Benefit To You

With these implementations, Workflow Mapping Runner has been improved, in order to incorporate some new functionalities.

FTZ/IMMEX Item Master - Reuse Existing Masterdata Product API**What It Is**

As part of the 21.4 Release, Workflow Mapping Runner Re-Architecture have been proposed and implemented.

Benefit To You

With these implementations, Workflow Mapping Runner has been improved, in order to incorporate some new functionalities.

IPAPI Short Term Enhancements**What It Is**

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As part of the 21.4 Release, IPAPI Short Term Enhancements have been implemented, for IPAPI.

Benefit To You

With these implementations, IPAPI usage has been expanded to improve current IPAPI functionalities.

2nd Gen Outbound Controllers and Configurations for Oracle R12 Integration What It Is

As part of the 21.4 Release, 2nd Gen Outbound Controllers And Configurations have been implemented, for Oracle R12 Integration.

Benefit To You

With these implementations, Oracle R12 Integration solution will be more efficient and overall, improved.

Feature: 119196- Improve Automated Tests Coverage - Part III

What It Is

As part of the 21.4 Release, new ERP API Automated Tests were created.

Benefit To You

Make sure the interfaces are tested in the most common scenarios so which will improve the interface reliability.

Feature: 56677- GC - Item Master Interface (Country and Module Specific Fields)

What It Is

As part of the 21.4 Release, the ERP Product API were changed to include Item Master information (Country and Module Specific Fields).

Benefit To You

These ERP Product API will be able to receive country and Module specific data from external systems.

Feature: 7649 - Integration Tool Enhancements

What It Is

As part of the 21.4 Release, some Integration Components were changed to enhance some of their capabilities.

Benefit To You

With these changes, they provide possibilities of enhancing some of the capabilities, for some of the modules/product.

Chapter 3 Connectivity

AES TRANSMISSION

FTZ Number Field Increased in AES

What It Is

U.S. Customs and Border Protection (CBP) has recently increased the possible length that the FTZ Number may be issued at from 7 characters to 9 characters long. In order to ensure that any of our customers using the AES Connectivity solution to manage their EEI filings remain compliant if they are exporting from an FTZ, two corresponding changes were made in 21.4. First, the EEI report was adjusted to accommodate the longer length of the FTZNum field, and secondly users will be now be warned if they try to validate an AES shipment with an FTZNum that is longer than 9 characters instead of 7 characters.

Benefit To You

These two enhancements will ensure on-going compliance with CBP reporting requirements of FTZ exporters and will be made available to all AES filers automatically with the 21.4 release.

AUTOMATED BROKER INTERFACE (UNITED STATES CONNECTIVITY)

Updates to Meet 3461 Report Changes by US Customs

What It Is:

CBP made updates to the 3461 report to allow for reporting of entities at the line level.

Benefit To You:

Previously, entity data was only reported at the header level, which did not allow for differentiation of parties on the tariff lines. This CBP update allows users to report more accurate entity data on the cargo release. The change to the report now matches more accurately with what is filed with CBP.

Preparation for the Global Business Identifier (GBI) Pilot with CBP

What it is:

Customs is preparing the GBI Pilot for the Spring of 2022. This pilot will allow users to file the additional data elements with the Cargo Release filing in preparation for the mandatory rollout.

Benefit To You:

Customers will be able to apply and participate in the pilot as CBP makes it available. This will allow users to have a head start and provide feedback to CBP to help shape the direction of the GBI program. More information on the pilot will be available in the coming months. If you are interested in learning more about the pilot, please reach out to your Thomson Reuters' account manager.

Updates to Meet Regulatory Changes by US Customs

What Is It:

During Q4 of 2021, the following updates were made by US Customs:

- Entry Summary and Cargo Release Status Notifications
- PGA Validation and Global Code updates
- Retaliatory Updates

Benefit To You:

Entry Summary and Cargo Release Status Notifications - These updates will ensure that users have the most up to date reply responses from CBP.

PGA Validation and Global Code updates - Updates for FDA and NHT to match Regulatory changes.

Retaliatory Updates - These updates will ensure that users have the most up to date information on Tariff schedule changes.

Updates to Reconciliation of PSC Entries

What It Is:

Updates were made to improve the handling of PSC data for Reconciliation filing

Benefit To You:

These changes will make it easier for users to reconcile PSC data in the Reconciliation Module

Chapter 4 Global Trade Content

GLOBAL TRADE CONTENT EXTRACTS

Remove Integration Point News from all partners

What It Is

This is a deactivation of one of the Integration Point modules. The Integration Point News feature allowed for clients to view news related to Global Trade. Thomson Reuters is deactivating this module to focus resources on other tools that are more widely used across the GTM client base.

Benefit To You

Staying with Reuters as main information provider. Reuters news is read and seen by billions of people worldwide every day, with unmatched coverage in over 16 languages, and reaching billions of people worldwide every day, we provide trusted intelligence that powers humans and machines to make smart decisions. Founded in 1851, Reuters has remained true to the Trust Principles of independence, integrity and freedom from bias, working relentlessly to bring news from the source and from every corner of the world.

Main Duty API Estimation

What It Is

This is a new API feature that will help clients estimate the Main duty that will be charged on a particular trade lane, using API calls. Based on a country of origin, destination country and HS Number this will allow for a user to enter a transaction value and quantity to determine this estimate. This first phase of Main Duty API Estimation will handle over 99.5% of trade lanes globally. These following formulas are used to determine this Main Duty Estimation:

- ASG
- ASL
- PERCENTAGE
- PERUNIT
- PLUS
- NOTE

Benefit To You

Final User will be able to perform API calls for more than +215 countries, so they will be able to perform main duty estimations. Users will be able to see the charges applicable for Main Duty for a specific HS Number based on a country of origin and country of destination.

What It Is

Global Trade Content has created a new user guide to help clients stay up to date with the WCO 2022 Tariff Schedule Changes. This document includes countries that have published their 2022 Tariff Schedule Updates along with an overview of the upcoming WCO 2022 changes.

From within the Thomson Reuters GTM platform, a user can click on their username and then select Help. After that if they type in WCO to the search bar this will bring the user to the HelpCenter. From there the user will be able to view a new user guide called 'WCO Tariff Schedule Change'.

Benefit To You

Global Trade Content updates and monitors tariffs for over 215 countries on a daily basis. This way clients can ensure they have access to the most up to date content possible.

Chapter 5 Duty Deferral Programs

FOREIGN-TRADE ZONE MANAGEMENT (DISCRETE)

Updates to Meet 3461 Report Changes by US Customs

What It Is:

CBP made updates to the 3461 report to allow for reporting of entities at the line level.

Benefit To You:

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Benefit To You:

Customers will be able to apply and participate in the pilot as CBP makes it available. This will allow users to have a head start and provide feedback to CBP to help shape the direction of the GBI program. More information on the pilot will be available in the coming months. If you are interested in learning more about the pilot, please reach out to your Thomson Reuters' account manager.

Enhancements to the Shipment Reassignment Process

What It Is:

Within the 21.4 Release, several enhancements were made for performance and usability on the Shipment Reassignment screen.

Benefit to you:

With larger volume entries, processing moves will be much quicker and screen usability is more intuitive for users.

Updates to Meet Regulatory Changes by US Customs

What It Is:

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Benefit To You:

These changes will make it easier for users to reconcile PSC data in the Reconciliation Module

IMMEX

Annex 24 Reports Enhancements P2

What It Is

This change provides to users some small enhancements related to the generation of the reports where now is possible to select for more than one pedimento code to generate the reports. The solution covers the following reports:

- Allocated Import
- Allocated Export
- Pedimento Balance
- Pedimento Summary
- Pedimento History
- Multilevel BOM

Benefit To You

This enhancement provides to the users more usability simplifying the extraction of reports and reducing efforts.

Value Manifest Legal Changes - Part III

What It Is

This enhancement is related to the implementation for the new Value Manifest defined by SAT. The entire solution covers the changes applied to the layout of the document and the inclusion of the web service to send this document electronically to the Customs Authorities.

Benefit To You

With this feature, customers will be able to send electronically their Value Manifest using the web service provided by SAT maintaining the operation in accordance with the required legal and technological requirements.

Pedimento Layout adjustments

What It Is

This item is related to the new regulation published by SAT on June 1st (2021) and removes some fields from the section "DATOS DEL PROVEEDOR O COMPRADOR" of the M1 file. This change already was applied in production for all customers on August 16th. More information can be checked in the regulation below:

https://www.dof.gob.mx/nota_detalle.php?codigo=5619911&fecha=01/06/2021.

Benefit To You

The changes applied keep the solution according to the regulation avoiding any problem with customs authorities.

Chapter 6 Global Trade Management (GTM)

DENIED PARTY SCREENING

Subcountry Dropdown

What It Is:

A dropdown has been added to the Subcountry field that provides a list of states/provinces/sub-countries to the user. The user will still have the ability to type a value that is not listed in the dropdown.

Benefit To You:

For ad-hoc searches, a user can more easily select a State/Province value for the Subcountry field within an address.

Name Type

What It Is:

A new field called "NameType" has been added to Company Maintenance and is able to be stored per company record, so it can be used by the Advanced DPS engine during automated batch screenings. "Name Type" has also been added to the DPS



Management page so historical screening records can display what value was provided at the time of search, as this value (Individual / Organization / Unspecified) could impact the resulting hit scores.

Benefit To You:

The “Advanced” engine considers the “NameType” value (of Organization or Individual) to help the search algorithm better analyze names of organizations or names of individuals when searched. In 21.3 this was added for Ad-hoc searches, but 21.4 now allows this value to be saved into the master partner data, otherwise known as Company Maintenance – so that it can be leveraged during batch/automated screenings. This value will also auto-populate when a user loads a company for screening on the ad-hoc page.

For users reviewing historical screening records on the DPS management page, they will now be able to see which value (Individual, Organization, or Unspecified) was used with the search; as search results could vary depending on the value provided.

FREE TRADE AGREEMENT MANAGEMENT

Spreadsheet upload for solicitation

What It Is

Spreadsheet upload for solicitation so the user does not have to select parts individually.

Benefit To You

Allows the user to upload a list of parts and suppliers that they would like to solicit through the FTA product. It will pull in the HS number and description for that part number that is listed in the part number for FTA module.

Certification Product Grid filters

What It Is

Added filters in the Product Grid for selection. Expanded the grid pane for better viewing on the screen. Also added filtering capabilities to the grid for the selected products.

Benefit To You

Allows the users can filter out the information they want to certify.

BOM Edit Screen filtering

What It Is

Added filtering and sorting capabilities to the component grids on the BOM edit screen. Also added headers to finish goods and components list.

Benefit To You

Better viewing capabilities for the user and easier filter capabilities.

GLOBAL TRADE VISIBILITY

Additional Extract Capabilities added to Broker Declaration Audit, and Declaration Detail View screens

What it is:

A user can now extract the header and line information associated with an Import declaration, to excel.

Benefit to you:

Users are now able to pull this data from the system to share internally, or with brokers for various purposes including the process of resolving discrepancies in the data. In addition to the data from the declaration, audit notes are also able to be extracted from the Broker Declaration Audit screen.

IMPORT MANAGEMENT

Parties Can Be Added To/Deleted From Licenses After Allocation

What It Is

Prior to the 21.4 release, Parties could not be added to or deleted from a license after the point that a license had been allocated against. However, in many countries, agencies issue license/permit/authorization types that allow for amendments to be made after the initial shipment(s) have been made and quantities reported against those licenses. Therefore, License Management is being enhanced to allow for regulation code types to be configured that permit Parties to be added and deleted after the point of allocation.

Note

In order to maintain the integrity of the audit trail, specific Parties will still be blocked from being deleted if they are the Party on the shipment that was allocated against.

Benefit To You

This enhancement will support greater flexibility and remove the need to manage these scenarios in a manual off-system way. All current licenses and license regulation codes will remain unchanged with the 21.4 release. But if you are interested in having a new or current license regulation code configured to take advantage of this capability, please contact your ONESOURCE Account Manager for more details.

Performance Enhancement in Search Box on Import Management Invoice

What It Is

As a part of our continuing focus on improving the stability and performance across the platform this year, one of the key screens we have been working on is the Import Invoice Management screen. In 21.4, back-end refactoring was performed on the drop-down Search box to improve performance.

Benefit To You

While individual customers will see varying improvements based on client-specific configurations and shipment volumes, during testing we saw an average of 12% improvement in performance. The performance enhancements will be pushed out to all Import Management customers by default with the 21.4 release.

EXPORT MANAGEMENT

Parties Can Be Added To/Deleted From Licenses After Allocation

What It Is

Prior to the 21.4 release, Parties could not be added to or deleted from a license after the point that a license had been allocated against. However, in many countries, agencies issue license/permit/authorization types that allow for amendments to be made after the initial shipment(s) have been made and quantities reported against those licenses. Therefore, License Management is being enhanced to allow for regulation code types to be configured that permit Parties to be added and deleted after the point of allocation.

Note

In order to maintain the integrity of the audit trail, specific Parties will still be blocked from being deleted if they are the Party on the shipment that was allocated against.

Benefit To You

This enhancement will support greater flexibility and remove the need to manage these scenarios in a manual off-system way. All current licenses and license regulation codes will remain unchanged with the 21.4 release. But if you are interested in having a new or current license regulation code configured to take advantage of this capability, please contact your ONESOURCE Account Manager for more details.

Performance Enhancement in Search Box on Export Management Invoice

What It Is

As a part of our continuing focus on improving the stability and performance across the platform this year, one of the key screens we have been working on is the Export Invoice Management screen. In 21.4, back-end refactoring was performed on the drop-down Search box to improve performance.

Benefit To You

While individual customers will see varying improvements based on client-specific configurations and shipment volumes, during testing we saw an average of 12% improvement in performance. The performance enhancements will be pushed out to all Export Management customers by default with the 21.4 release.

GLOBAL CLASSIFICATION

PGA Validation Updates for APHIS, FDA, and FWS

What It Is

Updates have been made in the 21.4 release to the Partner Government Agencies (PGAs) classification validations for APHIS (Animal and Plant Health Inspection Service), FDA (Food and Drug Administration), and FWS (Fish and Wildlife Service) in the United States to continue to keep the validations current with updates published by CBP (Customs and Border Protection) in the CATAIR (CBP and Trade Automated Interface Requirements) documents. Classifiers need to be aware of those changes and keep their products pre-classified in accordance with current requirements in order to avoid delays at the time of border crossing.

In addition to these new validations, we removed some validations that had been in place for transactional data elements (e.g., quantities) which change with every shipment, in an effort to maintain only validations appropriate for pre-classification data elements.

Benefit To You

These changes will allow users classifying with PGA in Global Classification to remain compliant and save more time downstream on shipments. The updated validations will be made available by default to all users of PGA in GC with the 21.4 release.

IMPORTER SECURITY FILING

ISF Enhanced Password Reset Functionality

What it is:

The feature to reset a User's password has been enhanced for added security and to be consistent with other ONESOURCE Global Trade platform solutions. This upgrade includes the following changes:

- For the current user logged in, the "User Settings" tab will now have the additional field of "Current Password" that will be required to be completed in order to change the password.
- To change another user's password, the "Password" and "Verify Password" fields on the "User Settings" tab have been replaced with the "Reset User Password (automatic reset) link."

Benefit to You:

Passwords provide the first line of defense against unauthorized access to the system, and these upgrades ensure an extra layer of security. By requiring the existing user to enter a current password prior to initiating a password change, this provides an additional step in authenticating the user. Additionally, allowing the ability to reset another user's password by only using a secure reset link, ensures that passwords are known only to the intended user.

SUPPLY CHAIN COMPLIANCE

Enhanced Security Surrounding Emailing User Credentials

What is it:

Email notifications from the solution have been updated to no longer show all necessary credentials for a user to login to the system. Emails will now provide only the correct URL, Company Name and User Name. The Password itself will not be provided in the email message. The email will provide the recipient with instructions that **"A user password may be set or reset on the login screen by clicking on the 'Need help logging in?' link."** This will allow the user to set their own initial password on the first login, providing for a more secure approach to providing user credentials.

Should a user forget their password, that same link can be used to reset the password.

Benefit to You:

Passwords provide the first line of defense against unauthorized access to the system, and this upgrade ensures an extra layer of security. By removing the password from the email notification the user will be required to create their own unique password on

login providing additional security for the user. Additionally, allowing the ability to reset passwords by only using secure reset links, makes certain that passwords are known only to the intended user.

Chapter 7 Products With No Customer-Facing Changes for the Release

The following ONESOURCE Global Trade products had no customer-facing changes for the 21.3 Release:

Cross Platform Enhancements:

- Decision Tree
- Request Management
- Email Notification Dashboard (Email Bounceback)

Connectivity:

- AGS 3 (Netherlands Customs)
- ATLAS 9.0 Import (Germany)
- ATLAS AES 2.4 Export (Germany)
- CHIEF (UK)
- NCTS (Netherlands)
- Processing Trade Regimes (PTR)
- China Connectivity (AEO)

Global Trade Content:

- WCO Notes
- Analyzer
- ECN/Munitions Lists
- Global Tariffs

Duty Deferral Programs:

- Foreign-Trade Zone Management – Petroleum
- EU Customs Regimes
- Drawback
- DIS
- e214

Global Trade Management

- Entry Verification
- Export Verification