RELEASE 6.0E
Support Package 1

Summary of
New Features and Enhancements
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Introduction

This document provides an overview of the Vistex Release 6.0E new features and enhancements. Vistex provides this release summary to briefly explain new features and changes included the software. To ensure our customers benefit from new developments and improvements, Vistex offers a variety of sources of information about Vistex solutions.

Vistex publishes release notes both on SAP Service Market Place and on Vistex VOICE at http://www.vistex.com/VOICE. VOICE is a customer media channel for learning about Vistex solutions, networking with other Vistex users, and sharing knowledge and best practices for using Vistex solutions in the business processes that Vistex solutions support. VOICE provides an excellent vehicle for discussing new business trends, new features and enhancements, and engaging with the Vistex community about any topic that has piqued your interest.

Further information about Vistex features can also be found in the Vistex Help Portal at http://www.vistex.com/help. This website provides extensive documentation from the Vistex Library on Vistex solutions, organized by release number, product and application.

Vistex software releases, support packages and OSS notes are all available on SAP Service Market Place.

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Global Features

Status Flow

Activities Enhancements

**Activity Workbench Changes** - mass processing of reminders, auto outcomes, redirect from Workbench. Change in reminder time, activity status from workbench and view on admin data to check activity initiator i.e. system or manual (ref. Status Flow Enhancements).

Status Flow Enhancements

There have been several enhancements done to the status flow feature:

- **Time intervals** – when creating an agreement, users now able automatically set certain time interval to the steps outcomes.
- **Activity mass processing** – can set the auto outcome. When a number of pending activities remain unattended, then the same can be processed at once using the mass processing system.
- **Offline Approval** – allow the business user i.e. Manager, VP etc. to take action over an item over email directly when they are either out of office or not within reach of the actual system.
- **Reminders** – when agreement(s) expiration dates approaching, users are now able to send several reminders with the triggered dates and time. As an example, if the agreement creation date is on June 7 the reminder 1 can be send 10 days prior expiration date or June 17th; reminder 2 can be set for 2 days later on the June 19th. It will display both, the planed send date and the actual date.
- **Redirect** – define a person to redirect the activity to when the current assigned person is unavailable; the status flow can be redirected to a different recipient.
- **Delegation** – the approval can be delegated to another user. The delegation rules can be created to assign specific processor. There is a “CC” Flag, when this flag is marked the original recipient will be copied when the updates mailed.
- **Auto outcomes** – set for activities to execute after a certain period of time, reminders defined to execute periodically and activities that need to be redirected need mass processing in cases where there are a lot of them are pending.

Recipient List and Recipient Workbench

Recipient list is intended to function like a group where the required set of processors (user, external person, etc.) can be defined as a group and used across applications that use processors. In the Status Flow workbench, users can create a recipient list for activities to be sent. Same recipient list can be used in the status selection of the status flow as well.

Recipient Delegation Rule

Delegation is the process of involving a substitute into the activity management in the event of the absence of an entity for a period of time.

Status Flow Activity Completed Cases

When the activity in the status flow step status is completed for a step, the activity outcome will be automatically set by the system, provided the outcome is set using the activity. When the outcome is set in the activity workbench, the Admin Data tab will display:

- **Activity Indicator field** – the way the activity was started, e.g. system
- **Completed By tab** – will display:
  1. Manual – outcome was set using activity workbench
  2. System – outcome was set by using activity or status tab
Usage tab will display the purpose the activity was used such as "Status Flow", "Data Type" or "Calculation Run".

In the activity workbench users will be able to change the activity status, e.g. in case the activity is set to completed without an outcome, the user can override and set activity back to in process in order to set an outcome.

**Status Flow Copy**

Users can now copy the status flow with flexibility of selecting a different status profile. Since the statuses are likely to be different, only the steps and outcomes will be copied. Thus, when a new status flow is copied users will have to set the new statuses.

**Activity Template Workbench “Link” Tab**

**Business Objective**

Activity template can be used in case of communication over email since that medium provides the ability to notify as well as allow the end user to take action on an event. These notifications can be triggered by the activity and may contain links to take action directly from the template and/or include PDF or smart form attachments in the email.

**Functionality**

The Link tab in the Activity Template Workbench has been updated with the user-defined link option. Now users have flexibility to create a user-defined link such as a link to a personal workspace. When a user receives a notification for an approval activity via email, the user can click on a link provided in the notification to launch the appropriate screen in the Vistex solution (e.g. Agreement Workbench, Claim Workbench, etc.). The workspace can set the link to provide a value at run-time for the link to be dynamic to display the relevant object (e.g. agreement, claim, etc.) related to the activity template for that notification.

**Data Objects**

This new functionality allows users to upload an original claim, utilize this original claim as a source object of the initial data to analyze and refine the data and create a target version. The claim format can be formatted based on the file received from a partner: as example the full single string address from the excel file can be separated to several columns such as name, street, city, postal code, and region. The file can be uploaded via file upload transaction. The section mapping tab introduced the new comparison groups, which identify source components (original source) and target components. Object types have to be created in order to create data object. From the source users first have to identify set of versions: "original version" (source) and "target" version. There may be multiple source or target versions. There are multiple ways to compare original source and target:

- **Groups Comparison**: Source components of the entire Group can be compared by a comparison button on the menu; it will display both groups line items side-by-side, the original source will be highlighted in color.
- **Single Line Item Comparison**: The source can also be compared by a single line item by clicking "Row Details" button. It will display the target components value row versus corresponding item on the source part.

“Page” button option has been also introduced while displaying all claims data objects. (Refer to Vistex 6.0E Release Summary).
Rules Profile in Data Object

This feature will allow assigning new specific rules when creating new data object version. Before, it was offered only one rule profile to a particular section. Now, users can assign multiple rules profiles without restriction. To trigger the rules in a certain way, there are three new columns in the "Assign Rule Profile":

- **On Create Sequence** – rule numbers will trigger in the order the user assign the rules to be executed
- **On Check Sequence** – to trigger certain rule profile while the checks performed
- **On Change Sequence** – only certain rule profiles to be triggered while creating a new rule, or while changing a version

Rule Profile sequence will decide when to apply a rule(s) or perform certain check or change the rule.

**Rule Profile Section Mapping tab:** provide flexibility to assign rule profile in a section mapping level.

Reporting

Metrics Report Execution Integration

Now the calendar dates maintained in order to execute the report. Users can simply select the dates in the Calendar tab and execute report from Execution tab. Beginning with this release, users can add selected variants to the report to run on a specific date derived from a calendar. Using report users can create a workspace and add an IP report link for the report.

IP Reporting Enhancement

In the IP Report Workbench, the reports can be executed based on the selected dates in the calendar. This release introduces the new variance concept and the execution process has been integrated to run from Launch Pad.

Other Topics

**BRFplus Enhancements**

This release provides new BRFplus Create function. This function has several different options to create:

- Actions to trigger the message such as BRF functions call; call procedure, log message, send email, start workflow, workflow event; Web Dynpro message. It also gives users flexibility to create expressions from a new drop down conditions selections.
- Data Object- in the function group there are local variables and global variables that can be used for elements, structure and tables.
- Expressions or predefined expressions; some are offered by standard SAP and some are provided by Vistex. Can be utilized to build condition rule triggers. Rules can be marked as obsolete which will allow the rule to be in the system but will not have any functionality.
- Evaluation changes – provision of BRFplus expression to set element value.
- Grid elements- read values, fetch element will pull values.

The new BSP or web function is introduced for BRF Plus creation. The BSP offers numerous varied features, the script editor allowing the user to directly edit the rule set for the BRF function created. Expressions can be entered in to the script editor and then maintain the context and values for the rule set. Users are able to switch between text, symbol, and abbreviation for entering the information into the editor; change the color for the different information entered into the rule set. Reset button in the settings to reset everything to the default or maintain the title of the rule. Expressions can also be entered in the rule.
Once information is entered into the editor, the user needs to click Update to send the information from the BRF editor to the SAP BRF engine. The editor contains a syntax check function in order to make sure that the information entered into the function will work. The syntax button will check the syntax under the current rule and insert comment. Data object/tables can be inserted to the rule set based on the agreement or agreement request and can include different variables (material/material group/amount-validity dates and etc.) for future analysis.

**Cross Reference Upload and Download Transactions**

New transactions have been created for Cross Reference Upload and Download process.
Pricing

Changing Proposal Profile Behavior

Business Objective

The purpose of the Proposal Profiles is to extend proposal profile as view profiles for all requests (agreement requests, price proposals, deal request and price requests). View profiles can be used for standard pricing (GPR-maintainable transactions as well as deals and agreement rules tab). Used for maintaining user additional fields and to review those additional fields in the price proposals, agreement requests and price requests workbenches.

Functionality

The functionality of the proposal profile is to provide a view to add the user additional fields for the price proposals/Agreement requests/Price requests/Deal request instead of view profile, which is used for standard pricing and agreements rules. To maintain user fields for all kind of requites they need to maintain in Proposal Profile after adding the fields into corresponding structures.

Sheet Extension Tables

Business Objective

To reduce database table sizes; improve the performance and to save all the user fields in separate tables - sheet extension tables.

Functionality

This new functionality is used to save the extension fields in specific tables which are created to specific sheets other than regular tables (EATR/GKONP) to reduce the load of regular tables (EATR/GKONP) which are increasing in size, especially after the introduction of Price Requests, Deals and etc. For instance, in case of the Agreement request, Sheet extension Proposal table’s assignment depends on the usage of agreement request.

In the agreement type level both the extension tables can be assigned. When creating agreement request from agreement tables assigned to agreement type are taken and request is created.

- If sheet extension tables are directly assigned to agreement request, while creating a new request from agreement request workbench the table will be taken and rules are created,
- If user specifically requires certain price sheets not to be posted to agreement, and user required additional fields for those sheets, then they can be maintained in extension table and table in assigned to agreement request type level.
- If both agreement and agreement request type level has the assignments of sheet extension tables then in priority, tables assigned to agreement type level are taken and rules are created in agreement request

Price Simulation

Business Objective

The main purpose of the price simulation is to generate the prices for the different customers on different products in a single document, which is similar to catalog workbench with less functionality. The scope of this functionality is over the price simulation workbench.

Functionality

A new internal workbench is designed to strictly for Simulation purpose, where users will have customer information in the item structure similar to Catalog. Currently this functionality is used in the Matrix Pro
Forma Document. Technically, price simulation is subset of catalogs. An item data has to be entered manually in items tab. Items default Functionality is not supported. Header partners will not be maintained. Source can be taken either from agreement or agreement request for price simulation.

**Condition-Level Text in Requests**

**Business Objective**

This functionality will support texts at the price record level in request-type documents. This feature will be utilized in GPR-maintainable workbenches, Agreement rules tab, agreement request, and Price Request and price proposals.

**Functionality**

Users can enter and save text at the price records level according to the text determination procedure maintained for the document type. For the request-type documents, texts maintained for the price condition are carried over to the target documents.

**Change Documents for Extension Fields, Dimensional Scales, and Awards**

**Business Objective**

The purpose of this functionality is to track all the changes done (Insert/Change/Delete) of extension table fields, dimensional scales and awards in GPR-maintainable transactions, agreement rules tab, agreement request rules tab and price request.

**Functionality**

This functionality will allow users to track all completed changes on user additional fields, dimensional scales and awards on condition records:

- Change Document for Dimension Scales and Awards:
- Whenever user performs actions such as: Insert Change and Deletion on the dimension scales and awards, all the changes will be saved in the change documents.
- Change Document for Extension Fields:
- Supports Change Documents for all sheet extension tables. In order to track all completed changes over extension tables, user has to mark Change Documents flag at the data element level in structures. If the flag is marked, all the changes for the user field will be recorded in change document.

**Default Values on Condition Map**

**Business Objective**

To provide default values for the condition map ID price records fields, while creating activity from activity tab in the price request.

**Functionality**

When creating rules for mapping source sheet to target sheet fields, mapped fields are copied and the fields which are assigned as default will fill that value provided from condition map ID configuration in target sheets. When creating an activity from the Activity tab in Price Request, the user can provide the defaults for field values.

**Eliminate Dependency on Sales Deal Condition Type Group**

**Business Objective**
To eliminate dependency of agreement on price sheets and condition type groups. The purpose of this new functionality is to eliminate dependency of the agreement and request type documents on the Sales Deal Condition Type Group configuration.

**Functionality**

Prior to this release, whenever the agreement was created the condition type groups have been always assigned to price sheets and agreement types. The condition type and pricing table combination that is specified in the Sales Deal Condition Type Group configuration can now be maintained solely in the agreement type configuration. This change impacts the following areas: agreement, agreement copy, mass maintenance, agreement request, and dynamic pricing.

**Special Processing for Item Number as Key**

The purpose of this functionality is to provide checks for price sheets which have IRM_GUID as a key field in the A tables.

- Item and higher item can be displayed replacing IRM_GUID in price sheet.
- Higher level item can be proposed default and manually.
- Checks will be performed for checking higher level item is existed as item.
- Price records can be sorted based on higher level item.
- No duplicate Items are allowed in the price sheet.

**Comparison of Catalogs with Reference Catalog**

The purpose of this functionality is to provide a new approach to compare Catalogs with Reference Catalogs. The functionality is to compare the catalogs with reference catalogs by introducing a new structure to add the user additional fields for comparison in the catalog type level. In the catalog type configuration need to have the compare structure and the catalog group added to the comparison fields. There is also new Previous Catalog flag added in the configuration to compare the new catalog with the previous catalog. When configured to the catalog type the system will compare which items are different from a previous catalog.

- Introduced new comparison structure at the catalog type level in order to add the user additional fields in comparison.
- These user additional fields have effect on comparison.
- User can add additional fields in the item structure.
- Three types of comparison can be seen:
  1. Newly created records – Which consider as new even if there were a change in the user additional field data - green color.
  2. Item with no price change – If a record is changed without price changes then those will be displayed - yellow color.
  3. Item with price change – If a record is changed with price changes then those will be displayed - red color.

**Supporting Awards via Upload and Download**

The purpose of this functionality is to consider the awards when uploading and downloading the price records. This functionality is implemented in the following areas: GPR-maintainable workbenches, Price Proposal, Agreement rules tab and agreement request.

Uploading and downloading awards can be done in one of two ways:

- **When Scales are assigned to the condition type level**: In this case awards can be maintained at the scales level. The functionality is to support awards when uploading and downloading the price records maintained at the scale level. Award attributes and awards components are to be considered in the file template to upload the awards in file template workbench in mapping tab.
• **When scales are not assigned to the condition type level:** In this case directly awards can be maintained for the condition type level. The functionality is to support awards when uploading and downloading the price records maintained at the Condition record type level. Condition record Award attributes and condition record awards components are to be considered in the file template to upload the awards in file template workbench in mapping tab. No scales will be considered in this case.
Deals

Vouchers Workbench for Deals

Business Objective

The purpose of this functionality is to create and add a voucher to the specific deal.

Functionality

New Voucher Workbench added to Deals application. This new workbench will be used for deal in such instances as: customer receives xx.xx% discount when submits a voucher. By submitting the voucher customer can get a discount on the flexible group(s).

- In deals workbench vouchers tab added and as Voucher number will be added in deal(s) and specify the deal number(s) and whereas customer used voucher number in deal(s).
- Vouchers divided between single usage, multiple usage and ranges. If voucher usage type is ranges than range tab is displayed in voucher. In ranges tab, user can be assigned any number voucher from – to and without any duplicate.
- The status can be assigned to the Voucher type such as: Rejected, approved, in process and new. If user assigns voucher number to deal than voucher release status must be in final status. (Voucher status is assigned in voucher type level configuration).
- When a specific voucher is assigned to a deal than this voucher can longer be assigned to any other deals. The voucher is assigned to the deal in the Deal Workbench. The new Vouchers tab is added to the deal workbench. Vouchers can also be created from the Deal Workbench using the Vouchers tab.
- The voucher image can be uploaded or deleted.
- The voucher is processed on a sales order at the Header level on the deals. By adding voucher to sales order the discount is calculated while processing sales order.
- When vouchers processed as ranges, the vouchers bar code can be added to the Control Number field.

Compatibility Mode & Incompatible Deals Maintenance

The new Compatibility Mode flag is added to the deals workbench. This flag provide three values to select from "No Compatibility", "Compatible with All" and "Compatible with None". Users can list incompatibles deals with validity dates in the new Incompatibility tab. The Incompatibility tab will determine which deals the system will not be compatible and will use the highest discount. If the deal is marked as incompatible with another deal, when creating the sales order, if the discount from the first deal is selected, then the second deal will not be selected regardless if the material is eligible.

Deal Restrictions at Rule Level

New setting in the deal rules can be set at either Partial or Full and will determine if the deal can be earned partially or if the full quantity has to be ordered.

- If the partial option is selected, the system will allow a discount to be earned across multiple orders if the maximum has not been reached
- If the full option is selected, the system will allow the discount to be earned only if the full amount has been ordered on the same order.

Deal Restrictions handled through minimum & maximum fields at the benefit rules level. To determine the deal discount the new “Deal Price % Discount” calculation and condition value routine has been introduced in the Deals pricing procedure.

Deal Resolution

Deal Resolution used to apply the best deal when multiple deals exist. It is customizable at Document type, considers across items instead of current processing of single item.
New Category in Deals - Rebuy Qualifications

This feature was added to maintain additional data for condition types. Log Category already has several options to select from:

- Group Benefits
- Group Qualifications
- Rebuy Benefits
- Add-ons
- Add-on restrictions
- Eligibility using Customer List
- Grouping using Customer List
- Eligibility using Vendor List
- Grouping using Vendor List

Now the Rebuy Qualification has been added to the options. In the past there were Main order and sub-sequence order. The main order is to meet the qualifications and the sub-sequence order is to receive the discounts. If customer has main deal then it does not need to meet sub-sequence order qualifications. Now with the new Rebuy Qualification selection, customer can control the rebuy order qualifications before giving rebuy benefits. Rebuy qualifications is optional setup.

Deal Log Redesign

The Deal Log for sales orders is now at the header level instead of the item level. The Deal Log will display how the applied deal was determined based on the information entered into the sales order.

Additional Data Screen Redesign

Changed maintenance from Item to Header, Item additional data screen changed, allowing multiple Deals and allowing entering Vouchers.

Territory Formulas

Territory formulas have been introduced. The formula is assigned in the rules.
Agreement

Pro Forma

Business Objective

Pro Forma allows users to create any number of simulations for a proposed agreement or amendment to determine the profitability of that proposal before executing. Pro Forma displays simulations for all customers, materials and business rules across the agreement’s lifetime. Users can configure various perspectives to view the Pro Forma data.

Functionality

Pro Forma feature is accessed via a new tab on agreement in agreement workbench. The Pro Forma profile can be set up at the agreement type level. The purpose of the new tab added to the agreement is to display the profitability of the agreement based on the pricing, matrix, matrix usage and other parameters. Pro Forma profile is available to be selected from the agreement Pro Forma tab.

Dimensions

Dimensional Hierarchy

Business Objective

The purpose of this functionality is to provide dimensions on the condition records is to defining and validating Intellectual Property (IP) rights for all eligible materials on an agreement, they can be defined as attributes of a material and can be carried over into all material rules. This functionality is incorporated for GPR-maintainable workbenches, Agreement rules tab and material workbench, proposals, agreement requests, price profiles – Dimension tab.

Functionality

Using the dimensional hierarchy workbench, dimensions hierarchy for a category is maintained based on the valid date and dimensional profile. To maintain dimensions, Dimension Profile is assigned to the category; as well as dimensional profile has to be assigned to Price sheet level. Dimensions are now maintained for GPR-maintainable transactions, agreement rules, agreement request, material list, and claims at the claim type level.

Example of dimensional hierarchy:

1. Main (Franchise)
2. Parent (Branches)
3. Child (East coast Branch, Midwest branch, West coast branch)

Dimensional Hierarchy workbench:

- In the dimensional hierarchy workbench, category will be displayed, which are maintained in the configuration and can be view using GO TO CATEGORIES Button.
- The category hierarchy can be displayed based on the VALID ON Date

Maintaining dimensions in GPR transactions:

- Based on the dimension profile assigned to the price sheet, dimensions categories maintained will be displayed in price sheet.
Based on the valid from and valid to dates for the price record maintained the dimensions will be displayed.

The new Dimensions button was added in order to review condition records of the price sheet. It will display the categories that are assigned to the specific dimension profile. To maintain condition records, there have been added two different environments, either individual maintenance via Individual button or in matrix view via Matrix button. The purpose is to back up and storage of data combinations.

If the dimension category’s validity dates fall between price record validity dates then dimensions will be displayed. If the dimension category’s validity dates are not in between price record validity dates then dimensions will not be displayed, instead a warning message is displayed.

Dimension Cross-Reference Workbench:

- Dimension cross reference workbench is used to maintain dimension cross reference with respect to partner type.
- In this workbench, Category and their respective dimensions can be entering to a partner type with cross reference flag, dimension with an alias field “Dimension Entered” is also provided.
- In order to create an entry the valid key combination is partner, category, and dimension entered and valid from date.
- Cross reference flag: Checked if the cross reference is made available for any provider

Functionalities provided in workbench:

- Overlapping button is providing to check in case of existing overlapping records. If any overlapping records exist, resulted records will be displayed in another window in order to change the values.

Dimensions Evaluation:

- This functionality is used to evaluate the entered dimensions combinations maintained for a particular price record is valid or not. If is valid then condition type value are taken in pricing procedure.

Supporting Dimensions in Requests and Price Proposals

Users can create an agreement request containing dimensions and make changes to the dimensions in the agreement request by clicking on the new Dimensions button right on the menu in the workbench.

These changes then can be posted from the agreement request to the original request.

List/Group Management

Customer/Vendor List Workbench

Customer/Vendor list is a group of associated customers/vendors. The benefits of this functionality are:

- To efficiently assign and maintain multiple customers/vendors in the price sheet
- Easily access and manage group of customers

Customer List assigned in the price sheets will be displayed in a rules tab of an agreement or request. Customer List number can be used in different workbenches without entering all customers repeatedly.

Customer List for Agreement and Agreement Request

A number of customers can be assigned to a Customer List and the Customer List can be assigned to one or more agreement rules in one or more agreements. This saves the user the effort of assigning the same group of customers multiple times.

In order to maintain or assign a Customer List to a rule, the Customer List has to be assigned at the agreement or agreement request type level.
Vendor List for Agreement and Agreement Request

Similar to Customer List, Vendor List can be assigned to a number of vendors as a group by create/change/display a Vendor List. The configuration is based on the Customer List feature.

Product List

The new Release Status field is introduced in the Product List workbench. To turn off the postings the new flag is added to Product List Type configuration “Not Relevant for Postings”. This flag will prevent the product list from posting to A tables. Provide flexibility to create/maintain product list from agreement rules.

Customer/Vendor/Product List Maintenance from Rules

User can create/change/display lists (customer/vendor/product) from Agreement & Agreement requests rules. Lists (customer/vendor/product) are applicable in Agreements and Agreement Requests. In Agreement/Agreement Request, lists will be assigned in price sheets and providing right-click capability on rules grid to create/change/display a Customer List. This feature is limited to only price-sheets. Whenever the right click on list key field is available in a price-sheet, if the value of list key is empty then it can be considering it as create case.

Create Customer/Vendor/Product List from IDoc

From the “Lists” configuration at the Agreement Request type level, users can create list type/category for customer, vendor, and flexible group. Customer/Vendor/Product List can be created from the IDoc.

Flexible Groups Enhancements

There are a few changes made to the Flexible Group functionality:

- **Flag to identify default add-on**: New Auto Add-On flag is added to the deals workbench. These flag identifies the defaults add-on; user can add a material directly when the deal is processed.
- **Quantity fields to consider deal qualifications**: In the Flexible groups, users can now set a quantity to consider for deal qualification. In configuration maintain quantity and default add-on from maintain flexible group flags. When this functionality used in deal and the specific quantity is maintained at the group level then the deal should have the same quantity on the order. One of the new deal qualifications is that the deal has to have at least the minimum quantity equal to the quantity on the order. This will make the maintenance of deal qualification easier.

Other Topics

Agreement Postings

Agreement Postings functionality is redesigned, and offers new functions such as a separate workbench to view the postings made against an Agreement and new sources for the posting values.

For the existing customers that utilize old postings, the new “Turn Off New Postings” flag was added in the configuration. In order to view the old postings this flag has to be on, then users will able to review the old postings. This functionality allows user to determine which IP types will be used for which postings for an agreement type.

For new postings there three new sources to be used for the agreement:

- **LIS Postings** – the posting values can be retrieved from LIS type data in matrices which hold summarized IP document values.
- **Bucket postings** – posting values can be pulled from Bucket data which holds IP document values. Composite IP Postings – posting values can be retrieved from the data associated with a deployment code, participation type and usage.
• **Transaction IP Postings** – posting values can be retrieved directly from IP documents (this is only option available in the original posting design).

**Settlement Parameters for Customer/Vendor/Employee**

There is a small change was done to the pop-up window for creating customer parameters, now the parameters are available based on selection of customer, company code, parameter group and validity dates. The system will not allow creating the same customer/vendor/employee during the same valid settlement particular period. Parameter IDs created in the Settlement Parameter ID workbench are used to assign to Partners settlement Parameters (Customer/Vendor) during creation with validity dates. Partner Settlement Parameters is applicable in Customer Settlement parameters and Vendor Settlement parameters.

**Territory Formulas**

Territory formulas have been introduced. The formula is assigned in the rules.
IP Documents

Processing

Item Correction

Business Objective
To eliminate the discrepancies in financial reporting by creating Corrected Items for IP documents made from Resubmitted Claim items. Introduction of new functionality to create Correction Documents on re-pricing of IP documents whose periods are closed will remove these discrepancies in financial reporting. Item level Correction document will be generated in IP for resubmitted items of claims.

Functionality

- **Resubmission**: Item correction will allow the user to view the original claim and resubmitted items details in one document increasing clarity and simplicity for the user and improving the reporting. A new IP document will be created from the claim resubmission. The pricing of the correction document will be carried out. Correction IP document will be listed in the document flow at the header level.
- **Re-price**: The re-price scenario will ensure the IP documents whose periods are closed are not touched and if re-price takes place from composite side then a Correction document is created to ensure consistency in reporting. A Correction document will be generated upon re-pricing of IP documents whose periods are closed. If the IP document with closed periods is re-priced then each line-item condition requiring changes is added and changed in a new Correction document created for that IP document. If the IP document is re-priced again and an existing correction document’s period is closed then a new Correction document is created and the changed items are added to the newly-created Correction document.

New Control Correction Document field is added to configuration step that contains several options:

- Do Not Create Correction
- Create Correction for Resubmission
- Create Correction During Re-price
- Create Correction for Resubmission and During Re-price – when this option is maintained it will create IP document with correction items from the resubmitted claim and offset items from the previous IP document as shown in the above example in the functionality part.

Independent Claims and Transaction Register

Business Objective
The purpose of this feature is to reduce dependency of claims and transaction register on sales and billing document configuration

Functionality
In the past, such fields as Partner Determination Procedure, Status Profile, and Text Procedure were used to come from Sales Document Type/Billing Type mentioned in claim/TR type configuration.

Now, user will no longer need to configure a Sales Order type and a Billing type in claim/transaction register configuration. Instead all of the necessary configuration fields are now provided in the claim/transaction register type configuration. Vistex provides all the required fields in claim/transaction register type configuration screen.
Older claims that have been created in the earlier releases prior 6.0E-SP1 Release version still will behave as originally configured. Going forward, the new claims created in 6.0E-SP1 will behave based on the new configuration and will not be dependent on sales document and billing document.

**Split and Consolidation of Manual Conditions**

**Business Objective**

The purpose of Consolidation is to aggregate different values of various fields when claim is created using combination criteria.

**Functionality**

In previous releases, only quantity aggregation was available; now it is possible to consolidate manual conditions. This is done while creating claims via upload process and by reference with claim and transaction register.

When the claim is created using combination criteria, the conditions should also get aggregated. In previous releases, only quantity aggregation was available; now consolidation of manual conditions is also available. A new Combination Criteria flag has been added to the criteria menu to consolidate items. The claim quantities on line items are combined into one total quantity. The consolidation can be also done on the File Submission in the mapping tab. Claims can be split using split criteria.

**Message Log**

The new Message Log button is added to the claim/TR menu to display the most current message log. Message log shows all the messages generated during the processing of a particular document.

The messages in message log can be a mixture of current messages (applicable to the claim item now) and saved messages (applicable to the claim item before it was modified; no longer applicable to existing data), depending on the line item. If no current message is available for a line item, the saved message is displayed.

User can check messages for particular item by selecting it and using Message Log button at item level.

**Transfer and Delete Functionality Enhancements**

**In Validation Report** – Transfer and delete functionality was only available in standard claim and transaction register workbenches. From this release Transfer and Delete functionality is also available from validation reports.

**In Agreement Cross-Reference** – Earlier, creation of Agreement cross reference entry from Items grid was not allowed. In 6.0E-SP1 the new fields such as Original Agreement, Agreement Cross Reference have been added to support this functionality. With Support Package 1, users can create extra reference entries for agreements right from claim workbench by simply flagging the Agreement Cross Reference field.

**For New Pricing** – The new entry New Pricing message has been added in the configuration of message types. If user wants to suppress this message he needs to check No Message flag for this message entry.

For Statistics Update – Updating of purchasing LIS table for Purchasing Transaction Register type is now supported.

**Reconciliation Rebill Process**

Rebill functionality is available for Chargeback and Billback applications, or from the mass processing transaction.
Sales Order creation during Rebill process: Previously only claim was created during Rebill process, hence for the users who do not have Global and have only IP application would face certain inconveniences in order to remove these discrepancies. In current rebill process only claim document is created, so main purpose is to enhance the rebill functionality and give user option to create a claim or sales order document. SP1 introduced new Sales order creation during Rebill process. Sales Orders header data at the Accounting tab will display Rebill Reference Number.

Rebill functionality is available for Chargeback and Billback applications, or from the mass processing transaction. In the reconciliation the rebill amount might be different from the original claim amount and the net value. When using the claim rebill submission, the rebill amount can be set. This will trigger claim creation. User can view the Rebill Amount at the line item level.

Claim creation during Rebill process: Similarly to the sales order creation, when selected rebill items are saved it saves rebill amount. The rebill amount can be saved by default unless user changes the amount manually. After the rebill item is saved the system will trigger to maintain a claim from a claim workbench. When the claim is maintained the reason code and last rebill date are populated and rebill amount is changed.

Rebill process from reports: rebill report can be used to generate either sales order or claim from rebill report workbench.

Change of Upload Report

Upload report has been rewritten and now it is mandatory to use File Template while uploading the file. The grid which was there for mapping from upload report has been removed, also many file template related fields like Header Row, Item Start Row have been removed and now their values are fetched from file template.

Extension of Text Field in Item Detail

This release introduces an Extension Text button to allow the user to enter more text than the limitation of 50 characters in the item detail text field.

Dimensions and Dimension Hierarchy in Claims and TR

Business Objective

Dimensions in claims and TR designed for the purpose of Royalties to address royalty rights related to theatrical media. The actual usage of the rights now can be recorded on the claim.

Functionality

Dimensions can be utilized during pricing evaluations for royalty determination purposes. Based on the business requirements, dimensions might represent theatrical appearance: number of times the show was displayed, the country it was displayed in, etc.

Dimension Categories represent the list of theatrical base (TV, internet, et al) Dimension Categories assigned to the Dimension Profiles and Dimension Profile has to be assigned to the claim type. By default, Vistex provides three assigned categories. In case users select more than three dimension categories, the dimension fields are customizable with identical data elements.
Settlement

Settlement Reverse and Settlement Adjust Enhancement

When the user will have an IP document having separate partner for the header and at item level for each line item separate agreement is being determined each having different Partners. If the user chooses to settle such a document using the settlement parameter option "Settle by Agreement" then while settling the IP document two settlement documents will be created and partners will be considered from the agreement determined at the line item level. Earlier during process of settlement reversal and settlement adjustment if "Settle by Agreement" was selected while doing settlement reverse and settlement adjust "Settle by Agreement" was not considered hence the partners of agreement were not considered and on reverse settle/settlement adjustment IP documents partner was considered creating inconsistent data. Now with the new changes the partners determined by the agreement while settling those will be considered while performing settlement reversal and settlement adjust.

Bucket Processing Enhancement

Business Objective

To display all created buckets according to vendor, customer and agreement. In order to increase the efficiency for the other applications to access values of condition records for a particular line item in the bucket related fields to condition records were configured in bucket workbench.

Functionality

Buckets reduce performance run time and maintain settlement/accrual/re-pricing.

Revamp of Save Logic functionality

Ignore Y component in some scenarios such as settlement.

Business Objective

While performing the Settlement procedure user work on all documents collectively. As the volume of the documents a quite huge user ends up settling two million items in one go. This has an intense impact on the system in terms of performance, memory and time consumption. Due to this user is not able to finish the settlement process successfully.

Functionality

Save Logic was introduced in Release E with lean Y structure. Lean Y structure will store only the old item and header level field values required during settlement and parking process.

Release 60E –SP1 introduced lean X structure that will further improve the performance, memory and time consumption issues. The lean X structure has only the new item fields that will be used to compare with the old fields of the Y structure required during settlement and parking process.

Date Based Settlement Parameter

Business Objective

Date based parameters were introduced in order to maintain multiple settlement parameters for a particular partner valid for a particular time period.

Functionality

Date based parameter provides user with the flexibility to maintain multiple settlement parameter for a particular partner and its validity is maintained by the particular date range. For instance, in the case of over
1000 participants in composite user needs to maintain same settlement parameters for everyone previously this was not possible as parameters were maintained according to Company Code and Partners or only Partners.

- Newly introduced date based parameters will allow the user to maintain date ranges for which these settlement parameters will be valid in the Customer or Vendor Settlement Parameter Workbench.
- They can maintain multiple settlement parameters for company code, partners or parameter group for a particular date range.
- When there are many participants in composite and user needs to set for all of them same settlement parameters then they have to maintain parameter with parameter group only these are called as Global Parameters.

### Pools

#### Pool Reconstruction Enhancement

**Business Objective**

Earlier the reservation claim documents were not considered while running reconstruction report. Certain scenarios, such as deletion of criteria, were not considered when making changes in configuration; hence Pool Reconstruction revamp was modernized. Pool initialization option was also not available.

- To support Reservation Claims Documents while running reconstruction scenarios.
- To update pools with new documents

**Functionality**

In order to update the new documents in the pool, users can now perform reconstructions via Pool Reconstruction Report. Pool Reconstruction is used to update pools from any particular IP documents or reprocess existing IP documents; those IP documents that already have updated pools. It can reconstruct either only pools results or polls values. Users can select which documents to update, either existing IP documents or select specific documents from Billback; Chargeback, Sales Rebate, Sales Incentives, Purchase Rebate, Business Register and/or Claims.

Pool Initialization is a new option added to the Pool Reconstructions. Similarly to Pool Reconstruction have few options to select to update pools: “pooled only”, “reserved only” and “both pooled and reserved”. IP documents can be updated in Pool Initialization, but the difference is that when pools are updated via Pool Initialization following options:

- **Pooled only** – pooled items on the IP document that have been updated from the pool will be deleted
- **Reserved only** – will delete the reserved items, not the pool itself
- **Both Pooled and Reserved** – will delete both

The pool will not be deleted only the items from the pool. In the Pool Initialization, any Pool can be initialized by in a simulation mode and actual mode, in which changes will not get updated in database. In Simulation mode the report will display all saved actual items. By running report in actual mode, the report will display initial values.

#### Pool Reservation Integration

**Business Objective**

Pool Reservation Process is integrated into Standard as previously it was done with Pricing Procedure Requirement Routines and BADI methods making it excessive setup for manual configuration settings. During Reconstruction of Pool it was a challenging to decide from which Pool Profile to Reserve. Hence while
integrating the Pool Reservation Process into standard a configuration for assigning the Pool Profile at claim item control level is provided.

**Functionality**

Setting up Configuration for Pool Reservation Process is simplified by integration of Pool Reservation Process into standard. Also during reserving from a pool if there is no sufficient quantity available then Rejection Code is set this modifications to Pool Reservation process is mainly introduced for enhancement of the quantity check during claim validation process.

Basically to make sure that item level partner fields gets updated during all processes (such as creation) and in the respective workbenches.
Matrix

Scenario Workbench

Key Figure Reference Assignments at Usage Level

Key figure reference assignments are now available at the Usage level. In the Scenario Workbench in the Usage tab three new fields were added:

- **Key Figure** – to define values and analyze the key figures to view in the planning workbench
- **Pro Forma flag**– is a mediator for matrix. Before updating matrix, the data is uploaded into Pro Forma. When the flag is marked matrix will not be updated.
- **Enhancement Class** – is used for defining authority checks, when data is loaded customers may still need to make changes to the data.

Enchantment Class Assignment at Usage Level for Authority Check

There are new Authority_Check and Matrix_Data_Check parameters added to Methods tab in the /IRM/IF_IPMXS_ENHANCEMENT class interface. Matrix_Data_Check checks record level data in case user would like to additional checks along with application checks.

Formula Function Execution Events

In Functions tab, a new function type “Formula Function” is offered to enable user level changes to the key figures at Matrix record level. There are two options (“On Load” and “On Check”) at Scenario Workbench level to indicate at which time the corresponding method should be called.

Pro Forma Workbench

Creating and Maintenance of Pro Forma workbench

The main purpose of the new Pro Forma functionality document is to maintain the data where it appears under the approval process and post in to the Matrix. When the Data loaded in the load scenario, data usage for the Matrix, usage and scenario with a specified Pro Forma type then the data will be loaded and will be displayed in Pro Forma.

- Pro Forma can be created from the Planning workbench, Copy matrix reports, Scenario load and Agreement request. From the Scenario load, Matrix copy reports, Planning Workbench it can be created by simply specifying the Pro Forma type.
- To create Pro Forma from an agreement the new Pro Forma tab was added to the agreement workbench. It can be utilized for price simulation and review profitability analysis.
- If the Pro Forma flag is checked in the Scenario Workbench for the usage then Pro Forma is created by default or can be created according to the requirements.
- The Pro Forma created will be under the approval process after it is created from different concepts.
- Pro Forma can be created via following Source Document Categories: IP Matrix – Pro Forma created from scenario Workbench or panning Workbench; Agreement; Composite; Agreement Request. (Composite source category is not supported in SP1). When data is loaded and Pro Forma flag is marked, it will automatically create Pro Forma document.
- It contains two different views with which the data in the Pro Forma can be displayed: in the Grid view or the Web view.
- Pro Forma periods – come from the data uploaded, for instance if the data uploaded for 6 months the number of periods for Pro Forma is 6. T also can come from IP documents.
Upload or Download Matrix from Planning Result

This feature is used to upload or download the Matrix data from the Planning workbench. To upload or download the Matrix from the Planning result is done using the File Template where the Matrix, the type of sheet and the fields of the matrix which should exist in the Document are maintained with the position it must be placed. This functionality is used for download of the Matrix from the Planning result, when some data from the Planning result must be downloaded to the local document. This can be done through the selection Download in the Upload or Download button when the data in the planning needs to be downloaded. It prompts for the selection of the file template and the file template which was created for the Matrix must be selected and the file can be opened or saved. The same can be done to upload the data from a local file using the file template.

Revising User Functions Process

Execution of user-defined and computation functions in planning Workbench.

Matrix Update Report and Simulate Report

Matrix Update Report functionality is used to Update IP Document data into Matrix.

Simulate Reports are used to analyze the IP Document data in the format of matrix data.

Matrix Copy Reports Management

Used to Copy the data from one Scenario Usage to another Scenario Usage, also deletes the data completely or specifically and can also be copied in to the Target Scenario by deleting it from the source Scenario.

- The Source tab used to maintain the Matrix from which the data should be copied or deleted or copied and deleted in the source
- Copy Matrix Reports consist of Matrix with the respective scenario and usage in the “Source”
- Copy - Copies from Source matrix to the given Target Matrix, Delete - Deletes data from source Matrix and Copy + Delete - Copies data from Source to Target Matrix and deletes the data in source Matrix
- After maintaining the source contents i.e. the Matrix, scenario and usage then the action must be selected.
- If user selects the Copy or Copy+Delete function, the target and Mapping tab will also be displayed along with the selections.
- If there is a selection of only delete then it will display only with the selections tab.

Matrix Workbench Updates

Changing Existing Data Element for Existing Key Figure

In the Key Figures tab, the Data Element field is enabled to make changes to data elements of the key figures. When the data element values area stored it will be applied in the planning. When the matrix is generated it will be generated along with the data element.

“No Rollup” Flag for Key Figures

In Key Figures tab, key figure level flag "No Rollup" was added to indicate whether the particular key figure data used to be aggregate or not.

Defining Layout without Periods

Small change was made to the layout of the matrix. Now users can define lay out of matrix without identifying Periods. Matrix can be run and viewed based on Characteristics and Key Figures respectively.
Formula Functions

In Functions tab in previous releases, users had to maintain before and after change structures. Now only one function change should be maintained and applied to the data. Introduced new function type "Formula Function" which is applicable in the planning for two events: "After change" and "Function variables" where users can define their own formula functions.

User-Defined Distribution Function

In previous releases, Vistex provided pre-defined distribution functions to allocate higher level amounts to lower levels of the Matrix. Now users have the ability to define their own distribution functions to allocate amounts to other levels in the Matrix.
Composite

Flexible Groups Enhancements
The new Flexible Group Field flag is added in the deployment code configuration to display fields that hold flexible group characteristics and sub-components. When flexible groups assigned to the deployment code users will able to drill the flexible group to view the characteristics that are presented in sub-component structure.

Settlement Participation Parameters
Earlier parameters group entries were not allowed. Now, the new Parameter Group field is added to allow the parameter group to be assigned in the settlement parameters header. Settlement parameters will be picked from the Parameter Group field.

Themes
The new Theme button is added to the deployment code menu. Users will able to make changes and customize font, text alignment, size of the text for a specific style area such as sub-component; components, layout, subcomponent header. It will show the preview before making final changing to the text.

Awards
Integration of Awards into Composite IP
Configuration has to be maintained for Awards in order to maintain award type and integrate into composite.

- Award Type flag – configuration maintained based on the rule sheet flag;
- Scales – maintain in the agreement and can be scales based or direct award;
- Awards – are tracked in the deployment code based on the specific rules (for example: revenue; flight edibility and value; and etc.)
- Award as sub-component – An option added to the component configuration, will add a subcomponent to the awards;
- Formula builder – added new look up functions for awards;
- Award request document – when posted, will update the redemption amount for the corresponding award;
- Transactional Award – for each item can display how much has been earned and which program is used.
- IP document – each line item in the IP document can have an award. Award is fetched whenever IP document is created and can be viewed in the new Awards tab.
- IP pricing procedure – IP pricing procedure aligned with the award has to be relevant for the specific award. It is determined in the Additional Data for Pricing Procedure by selecting Evaluation Award flag.
- Settlement – There will be settlement for each IP document line item.

Awards Settlement and Reverse settlement
When there are multiple IP documents or materials involved in a settlement, users can calculate the different amounts for eligible accruals for each document or material. The system will aggregate the correct amount for each document for the accrual amount. This is done in the configuration of the deployment codes.

Awards Document Workbench
Using award type; grantor, receiver and validity period Awards Workbench track data based on the reward type: posting category; earning reverse postings; reverse redemption, forfeiture, quantity and amount.
Awards Request
Request an Award in other words means to post awards or to redeem awards. There are several various posting categories that integrated in Vistex configuration: earning; redemption; forfeiture; reverse earning; reverse redemption; reverse forfeiture and adjustment. The posting category combined with the control options: either “New Award” or “Update existing award”. Only an existing award can be redeemed. To redeem an award, user can simply find an award in the Award Request workbench and post it.

Aggregation in Awards
When there are multiple IP documents or materials involved in a settlement to calculate the different amounts eligible accrual for each document or material. Now the system will aggregate the correct amount for each document for the accrual amount. This is done in the configuration of the deployment codes.

Calculation Run for Awards
Similar to calculation run in composite. Award determination is based on It will display the eligible awards per participant. Award determination is based on settlement amount and formulas maintain in settlement formulas, similar to collective tracking.

Archiving
Report Archiving for Calculation Run
Before archiving the calculation run users have to set the completion status then it was ready for archiving. There are two modes available to run the archiving report: test mode and production mode. The report will provide the list of tables that have been archived. Before a final archiving in production users have a chance to check the report in the test mode. The primary check that should be carried out is the archiving of the posting documents. When all financial-accounting documents are archived the calculation run is ready to be archived.

Report Archiving for Deployment Code
Similar to archiving calculation run, archiving deployment code also has two options: test mode and production mode.

Other Topics
Transaction Type Maintenance
Earlier, transaction types were maintained in the configuration making it difficult for user to make entries. Now, new Maintain Transaction Type workbench has been designed in this release to maintain the transaction types for the Price type components. This functionality is provided for the ease of user to maintain transaction types for a particular price type. User just needs to run the transaction provided instead of maintaining it in the configuration.

Participation Fields Editable in Mass reports
In the prior releases, in order to assign agreement users had to assign participants to calculation run via a Participant button. With Release E Support Package 1, users can now conveniently assign an agreement value while creating calculation run.

Generating Deployment Code/Calculation Run Log Tables
In previous releases, the only option available to create a log was to create Calculation Run log tables. Now users have control to select what type of log tables to generate; there are 3 options to select from:
Summary of New Features and Enhancements

- Deployment Code log
- Calculation Run log
- Both Deployment Code and Calculation Run logs

**XML Transformation in Deployment Code Log Table Backup**
When backing up the data for deployment code log tables, before deleting from the tables the data now can be converted into the XML and stored in the memory. In a simple process, the data is backed up, tables are re-generated, and data is restored in XML format.

**Tracing Changes in New Mapping Sources**
In release 6.0E, new mapping sources (evaluation, buckets, and new matrix) were introduced, but did not offer traces. Now traces such as "Buckets Integration Tracking" are offered. The traces display which buckets information is processed from; bucket dates; lists IP documents with the summary of the results. "Evaluation Trace Log" displays agreement number, evaluation document number and results or totals score. The trace selection is based on deployment group, code agreement(s), participation, and evaluation anchor information.

**Participant Tracking for Virtual Participation**
Participants can be tracked in multiple deployment codes. In order to restrict participants tracking in the specific deployment codes, the new "No Participant Tracking" flag has been added in the configuration. When this flag is marked, the deployment code will not be considered in case of participant tracking. In Participant tracking, when selecting participant type the system displays selected participants, when the participant tracking is executed the system will display the deployment codes and variants to select. When deployment code is not relevant for virtual participation, users will have to track participant directly as it was done in the past.

**Explode Characteristics Mapping for New Sources**
Extend characteristics for new sources for a particular customer, material, and vendor. In order to pull the data for child customers/materials/vendors from under a specific parent customer/material/vendor, in the configuration the tracking characteristics and characteristics of a material or customer or vendor is assigned to hierarchy type, and assign a hierarchy value to the characteristics. Along with the parent customer/material/vendor data the users will able to receive the data for child customer/material/vendor. Now it is supported for buckets evaluation and new matrix.

**Formulas in Composite IP Report**
Users will be able to define the formulas for the user-defined fields.

**Reporting using Calculation Run**
Previously, to pull characteristics was available from only one rule sheet. Now users will able to fetch data from multiple rule sheets. New Composite with calculation run report provides option to run report on the data for calculation runs. Filter is available to run report by the posting type or the calculation run type as well as other information. The key figures will contain the proposed amounts, which are the amounts created when creating a calculation run.

**Settlement to a Position**
The new "Settlement to a Position" concept is introduced due to employees frequently change positions within a company. In this case the settlement performs to the person who currently is in the position listing first name and last name. Position is assigned at the deployment code level. Two hierarchy types are available to be assigned in the configuration: either "Evaluation Path" (SAP hierarchy based on the organizational objects or SAP HR hierarchy) or "Hierarchy Type". Collection tracking is performed on the position tracking. In the collective tracking case the participant is now referring to a position such as...
“Director of Sales”. The hierarchy level will display the name of a person in the position. The system will pick up a person who is in the position based on the validity dates.

**Adding Participant from Rules**

Previously in order to pull the participant at the deployment level, users first had to assign participants to the deployment code from agreement partner tab. Now, users can add partner conditions via Partner conditions at the deployment level and assign it to the rule sheet. This will allow adding participant in the Performance tab for the deployment code. This customer now is part of the settlement process. When both partner and partner conditions are maintained, partners will be added from partner rules; and partner rules will take a preference over partner conditions.

**Business Partner Integration into Hierarchy**

Business Partners are now able to be maintained in the hierarchy. A new “Business Partner” option has been introduced in the participation type. It is similar to the participant hierarchy process feature.

**Tracking Performance Optimization**

The new Optimize Performance flag is added at the deployment code level configuration to efficiently process large amount of data. This new functionality allows increasing performance and reducing the memory for tracking and calculation run workbench. In the past, the data was collected into a single table. When this flag is marked, only relevant data for a specific deployment code is collected using optimized parameters.
Data Maintenance – Resources

Data Map
Integrate data map for Customer and Vendor (similar to Material data map). As an example, user can re-assign the un-assigned address to any usage once it has been created in the unassigned address section. Deleting the assignment will remove the address from the current assignment. Deleting the address will remove the address entirely from every assignment.

Awards
Awards are non-financial settlements given to employees or customers based on their performance. Award Component Workbench provides three default component categories:

- **Points** – for every dollar spends receive and accumulate certain amount of points.
- **Rules** – customer makes a sales deal, for instance customer has to purchase certain amount of material for agreed dollar amount; and then the award is based on the future transaction of the sales deal. Whenever customer reaches agreed dollar amount will get an award. The sales deal rule is applied every time customer purchases material toward the agreed dollar amount.
- **Value** – certain value of a dollar amount. The value can be maintained with scales.

Component Attributes can be maintained for each component category: Points can be assigned based on the value of destination. Component Attribute for instance can be a flight ticket value based on domestic flight or international flight. Component attributes can be single or multiple values such as flights can be to different destinations: Chicago, New York.

Users can also specify Award Type: outgoing or incoming; grantor type of the award: vendor or customer; receiver type: vendor or customer; award can be based on a specific validity period; and when the flag “Cumulative Award” marked will accumulate award based on the validity. Award Reference Program (agreement) can be assigned to the award component and will be updated each time the award is updated. New sales deal will not be created. The New Program can be created based on the Award Reference Program. Multiple New Programs can be created for each IP document.

Upload and Download Files via File Template
All upload transactions should support file template. Purpose of this functionality is to provide uploading and downloading of list through Excel file, CSV file, Text file etc. This Functionality is available for Customer/ Material/ Vendor list workbenches. In file template workbench, users will have to define Section Indicators for sections (maintained in configuration). Sections are basically areas for which user can maintain data. Mapping has to be maintained for sections with their fields and position for fields and field mask. This functionality is enabled in order to upload from excel or download to excel files into/from SAP system.

Language Dependent Attribute Set
The purpose of this new functionality is to allow descriptions for attribute sets to be maintained in multiple languages. Attribute Sets are used routinely throughout the Data Maintenance tool, and will now have the option of being presented according to the logon language. User can maintain description for attribute set in more than one language in the Customer/Vendor/Material Attribute Set workbench.

Customer Type change from Customer List
Users can now change customer’s type from the Customer List. When entering an existing customer users can manually select a new customer type.
Background Post in Worklist Mass Process

Background post (Save now and post in background) at user-defined time was missing in work list mass process. Purpose of providing this functionality is to post work list documents from background. This functionality is available in Customer/ Vendor/ Material workbench. New Post Job button is added in mass process pop-up window in order to post background. By using that button users can post selected documents from background.

Search and Replace in Text

The purpose is to search text maintained for Customers/Vendors/Materials in the Customer/Vendor/Material list and replace the text or a substring of the text with a different value. A new text-related Action field value, Search and Replace, is introduced in the List to allow users to Search for a particular text string and Replace with a different text string. The text for the object is updated once the List is posted.

Internal and External Number Range for Product Type

Now both internal and external number ranges can be maintained for a single product type. Purpose is to create Material with internal and external number range by using only one product type. This functionality is available in material and material list workbenches. In EPSPRO provided field as "No range for internal assignment” and “No range for external assignment” at product type level.

List Search Using Attribute Set

Purpose of this “Attribute Set for Search” functionality is to search for Lists which contain the values specified in the attribute set in the “value entered” columns of the List. This functionality is used to search within a Customer/ Material/ Vendor list for items matching multiple attributes; if an item is found which satisfies the search criteria, the List containing that item is returned in the results list. Users can define temporary attribute sets as well as pre-define the “and”/”or” combinations of attributes.

Document Repository

This functionality allows users to attach external files such as Microsoft Excel spreadsheet, Microsoft Word document, text file, etc. to Material, Material List, Customer, Customer List, Vendor, and Vendor List. There is a new Attachments tab where files can be attached as an active or stored document.

User Maintenance Levels

Purpose of providing Flexible Maintenance Levels or User Maintenance Levels is that user can create their own maintenance levels and can maintain attributes for that maintenance levels. This functionality is available for Material, Material List, Customer, Customer List, Vendor, and Vendor List. These maintenance levels are not relevant for posting. Attributes for these maintenance levels are also shown as normal attributes.

Customs Tariff Preference

Customs Tariff Preference is new functionality now provided in Material and Material List workbenches to maintain Foreign Trade Export. In the Material or Material List workbench, customs tariff preference can be assigned in the header information. Customs Tariff Preferences can be selected from a new Customs Tariff Preferences tab.

Integrated Evaluation

Evaluation is basically a census questionnaire that provides score data on selected responses. In previous releases, Evaluation was only available in IP applications. The Evaluation tab has now been integrated in DMR Lists as well. Evaluation uses BRFplus functions to evaluate Lists. BRFplus can also be used to prevent saving and posting of the List.
Customer/Vendor/Product Type Change through Customer/Vendor/Material List Workbench

New "New Customer/Vendor/Product type" field provided in list workbench is allowing users to make change and post it to the list.

- When changing target type from a source type and target type attributes do not match source type attributes the system will trigger a warning "Attribute Branch number has been unassigned".
- If target type has some default attributes at definition level then after posting successfully, all default attributes will be defaulted in that customer if values for that attribute are not maintained in list.
- If target type has some extra output types than source type while posting all extra output types will be defaulted after posting.
- If target type has all output types different from source type, then while posting system will generate an error message.
- If target type has different partner functions in partner determination procedure than source type, system will generate an error message while posting.
- If target type has some extra partner functions than your source type, then after posting list all extra mandatory partners will get defaulted.
- If target type has different text ID and procedure different then source type then system will generate error message “Enter a valid ID according to the assigned procedure”.

Duplication Using Customer/Vendor List

Duplication functionality has been incorporated into Customer List and Vendor List. The Customer/Vendor list has to be maintained. The Log Display will show items that are duplicated.