

Oracle® Retail Store Inventory Management

Release Notes

Release 13.2

March 2010

This document highlights the major changes for Oracle Retail Store Inventory Management (SIM) Release 13.2. SIM 13.2 includes numerous functional, technical, and integration enhancements.

Product Overview

The Oracle Retail Store Inventory Management (SIM) software can manage any physical inventory functions that can be performed in a store, with the exception of selling the items. SIM has the following features:

- SIM allows the user to create or act upon external generated transfer requests between stores or generate transfers in SIM.
- Returns can be dispatched between the store and the warehouse. Returns can be generated in external systems or created within SIM.
- Receiving from a warehouse can be performed at the advanced shipping notice (ASN), container, or individual item level.
- Direct supplier delivery can be handled with or without a purchase order. If no prior purchase order exists for the delivery, SIM generates one.
- There are different stock count types in SIM:
 - Annual unit and amount counts synchronize SIM with an external merchandising system and allow re-evaluation of inventory. These counts can be performed by a third party or in-house, by sequenced location level or merchandise hierarchy.
 - Scheduled unit counts allow systematic counts of priority items.
 - Ad hoc counts allow you to verify stock-on-hand values when amounts seem wrong.
 - Problem line stock counts generate stock counts based on stock-on-hand exceptions.
- Inventory adjustments can be performed with different reason codes. These adjustments can move inventory from available to unavailable, from unavailable to available, from out-of-stock to in-stock, from in-stock to out-of-stock, and from unavailable to out-of-stock.
- Ordering items can be totally controlled in the store by directly creating purchase orders from the supplier or warehouse. Alternatively, additional items can be requested from the Oracle Retail Merchandising System (RMS) through the Item Request dialog.

- Sequencing allows you to indicate where specific items are located in the store. This feature allows restocking of the shop floor shelves from the backroom when out-of-stock positions occur.
- Tickets and labels can be printed based on price changes, purchase orders, and stock-on-hand positions.
- Emergency price changes can be requested by SIM; these are validated by the Oracle Retail Price Management (RPM) application before they are activated.
- Item, supplier, container, and customer order lookups are available. Each lookup has its own set of search criteria.
- Using the handheld mobile device, you can bring floor-based inventory management, which normally runs in the back office, to the shop floor and backroom, increasing user and store efficiency. The handheld is used to capture and validate data.
- Data captured in SIM can be sent to external systems, including a corporate-level merchandising or warehousing system. The Oracle Retail Sales Audit (ReSA) application provides inventory sales updates to SIM, to assure accurate and timely inventory positions.

Hardware and Software Requirements

See the *Oracle Retail Store Inventory Management Installation Guide* for information about the following:

- Hardware and software requirements
- Oracle Retail application software compatibility

Release Summary

The SIM 13.2 release has the following major goals:

- Store inventory efficiency

Support was added for tracking items with unique identification numbers (UIN). Additional item support was added for returns to suppliers enabled for direct store deliveries, as well as suppliers not enabled for direct store deliveries.
- User and customer experience enhancements

Enhancements were made to the visibility of transfer quantities and ID tracking integration.
- Direct inventory updates from point-of-sale systems
- Corporate and store efficiency and flexibility

Improved security deployment options were added. SIM can now also be deployed without the Oracle Retail Integration Bus (RIB).
- Internationalization

SIM has been translated into six additional languages.

Enhancements are described in more detail in the following pages of these Release Notes and in other product documentation.

Functional Enhancements

The following are the major functional enhancements for SIM 13.2.

Store Inventory Efficiency

The following enhancements were made to improve store inventory efficiency.

Support for Inventory with Unique Identification Numbers

SIM 13.2 supports the use of unique identification numbers (UIN) for inventory and includes the following features:

- Automatic generation of UINs and ticket printing for quantities received
- User interface dialogs to record UINs during receiving, inventory adjustments, and shipping
- Detailed status tracking of UINs from receiving through sale of items
- Web services to check item UIN status and update the status
- Problem line stock counts when stock on hand does not match the available UINs
- Audit trail of UIN events that affect inventory in SIM and point-of-sale systems

Support for Additional Item Types

SIM has added support for two new item types:

- Non-inventory items
Non-inventory items, such as warranty plans and gift cards, are items that can be sold in a store but do not necessarily have physical inventory. SIM handles non-inventory items by not allowing the user to make any inventory transactions against them.
- Variable-weight items
SIM now supports variable-weight UPCs (type 2) based on price. A variable-weight UPC can contain the price or weight of the item, in addition to the item number. SIM 13.2 only supports the use of the embedded price to calculate the weight of the item. When an item is entered or scanned anywhere in SIM, SIM finds the correct SKU. If the handheld is used to add a quantity (stock counts, inventory adjustments), SIM increases the quantity by a value based on the current active price.

Example:

Item 250010001500 is scanned. The embedded price is 000150 = \$1.50.

The price on file for this item is \$3.

The quantity is calculated as follows: $1.5/3 = 0.5$

The standard unit of measure for the item = kg, so the weight of the item is 0.5 kg.

Supplier Returns

Some retailers want to allow return-to-vendor transactions for suppliers that are not enabled for direct store deliveries. SIM added new system options that allow retailers to return merchandise to both direct store delivery suppliers and suppliers not enabled for direct store deliveries.

User Experience Enhancements

The following usability enhancements were added to SIM 13.2.

Flexible Transfers

There is more visibility to quantities for transfers within SIM. A store can view the requested quantity when shipping and receiving store-to-store transfers. SIM was enhanced with simplified transfer statuses, and SIM also provides stock-on-hand information for the inventory transferred or received.

The store-to-store transfer workflow was modified for a more consistent user experience, as follows:

- The user interface has the same look and feel for transfer requests, transfers, and transfer receipts.
- The same internal SIM ID is used for both the sending and receiving locations throughout the process. This allows users to reference the same transaction when communicating.
- Depending on the state of the transaction, both the sending and receiving locations see the same quantities that have been requested, approved, shipped, or received in a single user interface window. When receiving, a user can immediately identify how many units they requested and how many they are actually receiving.
- Several changes were made to handheld workflows to allow a similar workflow between requested and shipping quantities. In addition, extra features have been added to review scanned items and use scan functionality, regardless of whether the item was added or is being edited.

Inventory Adjustment Comments

Retailers often require additional information to be included in an inventory adjustment, to provide critical audit information in addition to the reason for the adjustment. For example, in the case of a product demonstration, this might be who is using the item, and where.

To support this business process, a comments field has been added at the header level of the inventory adjustment window. Because the comments field is at the header level, a user can apply the same comment to all items being adjusted.

Note: The comments field is only accessible within SIM, and not in other applications.

Item Resolution

SIM 13.1 and earlier releases resolved any scan of an item number on the handheld, or entry of the item number through the PC user interface, by returning a single transaction-level item. The item entered was required to be at transaction level or below, and to be stored in the item location table in a format identical to the number scanned or entered.

SIM 13.2 resolves UINs, UPC weighted items, or SKUs more dynamically on both the handheld and PC. In some cases, a pop-up window appears for the user to select the correct item.

UINs are not necessarily unique across all items, and if they are set up incorrectly, entry of a UPC2 item could also result in multiple hits.

Technical Enhancements

The following are technical enhancements for SIM 13.2.

Data Seeding

Foundation data seeding has been improved so that retailers can seed foundation data for one store or a group of stores. Retailers can also seed additional stores at a later point to support the roll-out process.

Platform Support

SIM 13.2 supports the following operating systems:

- Oracle Enterprise Linux Release 5 Update 3 (OEL 5.3)
- Sun Solaris 10
- IBM AIX 6.1

See the *Oracle Retail Store Inventory Management Installation Guide* for detailed information about hardware and software requirements.

Upgrade Scripts

To aid and encourage customers to upgrade from SIM 13.1.x to SIM 13.2, upgrade and data migration scripts are available to customers. These scripts are based on SIM 13.1.x.

The upgrade and migration scripts focus on bringing a schema up to date with the latest production data. The *Oracle Retail Upgrade Guide* provides more detail about upgrade and migration scripts; see "[Supplemental Documentation](#)."

Language Enablement

New Translations

For Release 13.2, Oracle Retail Store Inventory Management is translated into the following languages, in addition to the language translations supported in Release 13.1:

- Dutch (NL)
- Greek (EL)
- Hungarian (HU)
- Polish (PL)
- Swedish (SV)
- Turkish (TR)

Supported Translations

SIM is now translated into all of the following languages:

- Chinese (Simplified) (ZHS)
- Chinese (Traditional) (ZHT)
- Dutch (NL)
- English (EN)
- French (FR)
- German (DE)
- Greek (EL)
- Hungarian (HU)
- Italian (IT)
- Japanese (JP)
- Korean (KO)
- Polish (PL)
- Portuguese (Brazilian) (PTB)
- Russian (RU)
- Spanish (ES)
- Swedish (SV)
- Turkish (TR)

Integration Enhancements

The following are SIM 13.2 integration enhancements.

Point-of-Sale Transaction integration–Direct Inventory Updates

This transaction integration is a Web service that sends sales transaction information directly to SIM, bypassing the Oracle Retail Sales Audit (ReSA) batch process. This increases inventory accuracy at the store level because of faster updates.

A new Web service can process customer orders, serial-numbered items, and sales as one transaction. This means that all inventory buckets are updated at the same time, reducing the time lag experienced in previous SIM releases when customer order fulfillment transactions are processed. In previous releases, a customer order fulfillment transaction could be transmitted through a Web service, while the sales transaction (stock on hand reduction) came later through ReSa. This caused temporary imbalances of available inventory.

Note: This feature has the following constraints:

- If this feature is used by grocery retailers, the following conditions apply:
 - The selling unit of measure (UOM) must match the standard UOM. The logic to convert UOMs is not yet available.
 - SIM does not calculate sales-based wastage.
 - When this feature is used with Oracle Retail applications, a few additional constraints exist:
 - SIM does not receive any ReSA quantity modifications. If any ReSA inventory changes are made (including wastage calculations), SIM will gradually move out of sync with RMS. It is recommended that ReSA changes not be allowed. If there are lost transactions, they should be entered through the point-of-sale system.
 - Because unit and amount stock counts in RMS are not sensitive to timestamps, special care must be taken that all records are processed by RMS and SIM in a similar fashion. This requires the Stock Count Sales Processing indicator to be set to "daily sales processing." Before the unit part of the unit and amount stock count is closed in RMS, both systems must have processed the same sales transactions belonging to a period before or on the day of the unit and amount count.
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Role-Based Security

Role-based security provides a new access control model for SIM. It allows security to be managed in a way that corresponds closely to an organization's structure. This model provides improved support for customization, maintenance, and management of security in SIM. It simplifies customer implementations while maintaining a high degree of control and flexibility

This model was designed for multiple modes of operation:

- External mode
In external mode, user-related data is stored in an external system such as LDAP. Administration of user authorization in SIM is performed externally, using your LDAP tools or interface.
- Internal mode
In internal mode, all security data is stored in the SIM database. All administration can be performed using the security user interface in SIM.
- Failover mode
Failover mode is a hybrid of external and internal modes. External data is stored in the database, similar to the internal data. External users can be given internal assignments in addition to external assignments. The data stored in SIM is used when the external system is unavailable

Staging Table Support

SIM has always been designed to interoperate with a merchandising system. By default, SIM has only worked with the Oracle Retail Merchandising System (RMS), because of the SIM dependency on the Oracle Retail Integration Bus (RIB).

SIM 13.2 is decoupled from RIB. Because SIM does not require RIB, SIM can be deployed with merchandising systems of other vendors.

Decoupled from RIB, SIM 13.2 provides retailers several benefits that improve implementation and maintenance:

- As with SIM 13.1, you can perform maintenance on RIB servers without affecting the online operations of SIM. Asynchronous communication with RIB means that SIM can now function without RIB running. Messages will be published and consumed when RIB is available again.
- SIM decoupled from RIB, in combination with internal SIM security, allows quality assurance efforts to start earlier during the implementation, because SIM will not have data errors when publishing, and LDAP is not a required tool.
- There is more up time and stability for SIM.
- SIM integration code is isolated from SIM business code.
- Integration is easier.
- Messages persist in staging tables, providing a consistent pattern of communication.

Notes:

- Deploying SIM with other Oracle Retail applications such as RMS and Oracle Retail Warehouse Management System (RWMS) requires the use of RIB as the integration layer.
 - Deploying SIM with other vendors' applications requires custom integration work to interface data with the SIM staging tables.
 - If SIM is deployed with a merchandising system other than RMS, neither emergency price changes in Oracle Retail Price Management (RPM), nor direct store delivery lookup and maintenance in RMS, can be performed; these features should be turned off.
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Related Documentation

For more information, see the following documents in the Oracle Retail Store Inventory Management Release 13.2 documentation set:

- *Oracle Retail Store Inventory Management Data Model*
- *Oracle Retail Store Inventory Management Implementation Guide*
- *Oracle Retail Store Inventory Management Installation Guide*
- *Oracle Retail Store Inventory Management Licensing Information*
- *Oracle Retail Store Inventory Management Online Help*
- *Oracle Retail Store Inventory Management Operations Guide*
- *Oracle Retail Store Inventory Management User Guide*

Supplemental Documentation

For new customers, SIM 13.2 is a base release (a full product installation). Current customers who have installed SIM 13.1.x also have the option to upgrade to Release 13.2. For information about upgrading, see the following document at My Oracle Support at the following URL:

<https://support.oracle.com>

Oracle Retail Upgrade Guide (ID 1073414.1)

Because the upgrade process varies among Oracle Retail applications, the *Oracle Retail Upgrade Guide* describes the approach that each Oracle Retail application takes for the upgrading process, as well as product-specific upgrade assumptions and considerations. Actual procedures for the upgrade may be included in the application's Installation Guide.

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Value-Added Reseller (VAR) Language

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