Oracle® Retail Store Inventory Management

Release Notes

Release 14.0

E50535-01

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This document highlights the major changes for Release 14.0 of Oracle Retail Store Inventory Management (SIM).

Overview

Oracle Store Inventory Management is a mobile and PC based inventory management application. SIM increases store efficiency by helping store associates to execute and monitor all store inventory transactions, which allow store managers and corporate merchandisers to make better business decisions, reduce out of stock positions and simultaneously decrease total stock on hand and increase customer satisfaction.

SIM improves customer satisfaction by providing accurate and up-to-date in-store inventory positions, reserving inventory for layaway, managing customer orders, and allowing for cross store inventory lookup. SIM can also streamline inventory processes in the supply chain through its integration with merchandising systems (such as Oracle Retail Merchandising System), point-of-service systems (such as the Oracle Retail POS Suite), and warehouse systems (such as Oracle Retail Warehouse Management System).

SIM helps enforce best-of-breed in-store processes and allows increased efficiency by allowing store personnel to walk the shop floor with mobile devices while performing inventory tasks. Shrinkage is one of the main concerns retailers have, and SIM functionality can help prevent its occurrence by showing where shrink is happening. Serialized inventory can be tracked at every stage it can be touched by an employee, and an extensive detailed security model can control what employees can do. In addition, specific system-based transactions allow for inventory monitoring.

Hardware and Software Requirements

See the *Oracle Retail Store Inventory Management Installation Guide*, Release 14.0 for information about the following:

- Hardware and software requirements
- Oracle Retail application software compatibility

Functional Enhancements

The following functional enhancements are included in this release:

Commerce Anywhere

The following enhancement is included for Commerce Anywhere:

Customer Ordering

In order to support Commerce Anywhere functionality in the enterprise, customer ordering functionality in SIM has been expanded.

Prior to this release, SIM customer order functionality only reserved and unreserved inventory and kept track of the customer order for reference purposes. New and expanded customer order management functionality includes significant new features, including:

- Picking
- Cross docking of customer orders from warehouse, store to store transfer, or direct store deliveries
- Pick ups and direct shipments to the customer
- Reverse picking

Customer Order Picking is a new workflow where SIM informs the user what items need to be picked and set aside for either shipping out to the customer or for picking up at the store by the customer. Picking functionality can apply to a single order or multiple orders. If configured, picking allows for item substitution as well.

The Customer Order Delivery workflow allow users to either ship orders directly to customers or to have the customer perform a pickup in SIM if the order was paid for.

Customer Order Reverse Picking is an exception process to handle the cancelation of customer orders or reverse the quantities picked in those cases where items were damaged.

In order to fulfill multi-leg customer orders, enhancements were also made to store-to-store transfers, direct store deliveries and warehouse deliveries, including UI and web-services.

Enhanced Store and Corporate Efficiency

The following enhancements are included for store and corporate efficiency:

Inventory Adjustments

Inventory adjustment features in SIM have always been central to SIM functionality. This area has been significantly enhanced in this release of SIM in the following ways:

- System configurable sub-buckets have been introduced for the granular tracking of unavailable inventory such as repair, recall, display.
- A "template" concept on the user interface (UI) has been introduced that allows for the facile application of the same inventory adjustment transactions.
- Multiple items can now be associated with a single inventory adjustment transaction.
- Save and approval capabilities have been added.
- Pending inventory adjustments have been removed. System-generated inventory adjustments have been replaced with Transaction History.

Transaction History

A new concept called Transaction History has been added in this release. The transaction history is a read-only UI on the PC, which displays all transactions in the system for a user's store that have an impact on the stock on hand or on the unavailable inventory. Any time that a transaction impacts the stock on hand value or the unavailable bucket value, a transaction history record is written.

Store Pack Inventory

The ability for SIM to manage complex pack inventory has been enhanced to solve some of the selling issues that occur in a dynamic retail environment. SIM is now able to provide additional visibility into the items that can be sold individually or as part of a complex pack.

SIM is able to provide an estimated quantity for the complex pack when it is sold as both an individual component or as a complex pack. The notional pack indicator has been renamed to Store to Store Pack Inventory Indicator and extended to complex packs. SIM categorizes the item by identifying whether the pack is breakable or not based on these indicators. Breakable packs can be transacted in a similar was as non-breakable packs, but inventory for a breakable pack is always stored at the component level.

Support for a GS1 DataBar

SIM has a number of new features in this release to support a GS1 DataBar. This enhancement has impacts across the entire product because core the barcode-scanning functionality has been modified. All of the item entry fields on both the PC and mobile devices allow the entry of a GS1 DataBar. On the PC, a new popup screen called the Advanced Item Entry has been added to allow for the entry or scanning of items and barcodes including the GS1 DataBar. When entering or scanning a GS1 DataBar, SIM parses out the item, quantity, price and universal item number (UIN) and applies those to the transaction. The price is used to calculate the quantity of the item.

Service Enablement

Several changes have been made to existing web-services and new services have been added. These enhancements adhere to common Oracle Retail architecture and governance patterns. The new and improved services include the following:

- Item lookup
- Inventory lookup (store, buddy store, transfer zone, multi-store/item combination)
- Store inventory UIN
- Markdown check
- Store-to-store transfer
- Returns
- Manifest
- Customer order management
- Customer order:
  - Create
  - Lookup

  - Delivery
  - Pick
  - Reverse pick
- Inventory adjustment
- Item basket
- Item request
- POS transaction

Notifications/Alerts

Multiple new configurable notifications have been added to SIM for this release. Alerts have been added for New Customer Order, New Customer Order reminder, Customer Order Pick reminder, Transfer Request, and Customer Order Receipt. To function properly, all notifications require proper security setup. Only those users with the proper permission receive the notification. Although email is the default delivery mechanism, the framework allows for various delivery mechanisms when extended. See latest SIM Implementation Guide for more information.

User Experience Improvements

A considerable number of enhancements were made in SIM to improve its user interaction and experience.

Unit of Measure (UOM) Retaining Capability

On both the PC and the handheld user interface, when starting a transaction, the system default unit of measure (UOM) is used. If the user switches the UOM, the system retains that UOM within that transaction until the user modifies it. The UOM resets back to the system default when the user leaves the transaction.

Configurable Advanced Barcode Application

SIM supports the following barcodes: SKU, GS1, UIN, UPC E, and Type 2 A through L. The parsing of items and barcodes is now configurable in the database. Users can decide whether the type of barcode is 'Active' (where the system would perform the logic to look for this type of barcode when parsing). Users can also configure the barcode parsing order.

Stock Counts

In this release, all sales transactions and audit adjustment extracts from Oracle Retail Sales Audit (ReSA) to SIM have a transaction time stamp. Because of this ability, stock counts are updated, so late sales are directly applied by the stock count process when moving to the re-count or authorization steps before the calculation of discrepancies.

Quick Item Ticket Print

Users now have the option to perform quick ticket printing, where the system remembers the ticket format the printer and defaults to one (1) as the quantity on item scans.

Purchase Order Display

The Direct Store Delivery workflow has now been streamlined on the PC to give users visibility to purchase orders while creating new deliveries.

Duplicate Invoices

Direct Store Deliveries have been modified to configure whether the invoice number can be entered as any number, cannot be entered at all, or can be entered but must be unique per supplier.

Item Lookup

Inventory Status and Brand have been added as search criteria on Item Lookup. The Item Lookup Detail UI has been enhanced to show non-sellable inventory positions with detailed sub-bucket breakdowns along with brand information.

Related Items

SIM now subscribes to other item types of related items from RMS. These types include Cross Sale, Up Sale, and Substitute items. They appear in the Related Items dialogue. The existing related items that have the same parent item are listed as "Related." Substitute type of related items can also be used within the Customer Order Picking workflow.

Shelf Replenishment

In prior releases, a "Pick List" represented the moving of inventory from the back room to the shop floor. In 14.0, as described above, Customer Order enhancements resulted in a new dialogue called Customer Order Picking, which is for the picking of items for customer orders. To avoid confusion, the previous pick-list reference is now renamed as "Shelf Replenishment."

Role-based Security

As described below, security deployment models have been modified so that they are more coherent.

- External authentication and authorization: The users and roles/permissions data is held at the LDAP.
- Internal authentication and authorization: The users and roles/permissions data is held at SIM database.
- External/internal authentication and internal authorization: There are two identity stores for authenticated user credentials. Roles/permissions data is held at SIM database.
- External/internal authentication/authorization: There are two identity stores for authenticated user credentials and user/role/store assignments.

Return Reason Codes

Return reason codes can now be entered through a UI instead of through direct database insertions. Return reasons will have an inventory status associated to them. Returns will be made from available or unavailable stock based upon the inventory status associated with the reason code. Return to warehouse and return to finisher have been modified to restrict reason codes based upon the inventory status selected on the header.

Integration Enhancements

The integration enhancements described below are included in this release.

Integration with Oracle Retail Point-of-Service (ORPOS) and Oracle Retail Sales Audit (ReSA)

With this release, ORPOS becomes the primary source of sales transaction information for SIM and ReSA, providing only the modified transactions delta updates to SIM. Via a new batch, sales transactions are directly imported into SIM. Retailers have an option to integrate SIM with ORPOS either via the batch file process or web services.

Note: Previous batches have been replaced with a new single batch that imports both customer order transactions and sale/return transactions.

Integration with Oracle Retail Price Management (RPM)

The entire RPM to SIM integration has been enhanced to support time-based promotions and overlapping promotions.

Integration with Manifesting System

Retailers can now integrate SIM with a third-party manifesting system for creating manifest documents, bill of lading (BOL) documents, and print labels. SIM exposes a manifest-web service, so shipment information can be sent to a manifest system. Shipping functional areas of SIM that can be interfaced with a manifesting system include the following: Customer Order Deliveries, Finisher Returns, Return to Vendor, Return to Warehouse and Store-to-Store Transfers.

Part of this new feature also includes the return of a tracking ID for the shipment from the manifest system.

New Two-Stage Dispatch Process

All shipment dialogues can now be enabled to submit the transaction. This functionality allows for a separate approval/dispatch from the creation process.

Pre-Shipment Message

A new message has been added to SIM that can be sent to external systems over the Oracle Retail Integration Bus (RIB) when the shipment transaction is submitted or dispatched. This functionality has been added to the Store-to-Store Transfer, Customer Order and Returns dialogue.

Technical Enhancements

SIM now uses Oracle Fusion Middleware with Java Required Files (JRF) extensions. If single sign-on (SSO) is enabled, SIM uses Oracle Identity Management 11gR1. SIM also now utilizes credential stores and security authentication providers.

The packaging of SIM code has also been updated. The "Ext services" package is used for non-RIB, outgoing integration such as RSL to RPM, RSL to RMS, calling the manifest web-service, and calling the web-services that could go to an Order Management System (OMS).

The "Int services" package is used for non-RIB, incoming integration, such as the web services exposed by SIM.

Software Operating Environment Upgrades

Note: The list below announces the addition of Oracle Retail support for the technology described. See the Installation Guide requirements section for critical information, such as whether the enhancement below replaces previous versions or is supported in addition to already existing versions.

The technology below has been upgraded.

- Oracle Linux 6 for x86-64 (Actual hardware or Oracle virtual machine)
- Red Hat Enterprise Linux 6 for x86-64 (Actual hardware or Oracle virtual machine)
- Java 1.7.0+ 64 bit for the server side (JDK)
- Java JRE 1.7.0+ for the client browser

Documentation Enhancement

The following documentation enhancement is included in this release.

Security Guide

This new guide addresses pre and post installation considerations and configuration for the infrastructure that supports SIM, as well as infrastructure troubleshooting points. Topics about the SIM application security include its security features, encryption and hashing, administration, and more.

Known Issues

The known issues described below are included in this release.

- After receiving a purchase order, SIM does not allow additional stores to be added to that purchase order. A new purchase order is required.
- Retailers cannot make inventory adjustments in SIM through the SIM web service without impacting the external merchandising system. This issue prevents the custom reconciliation processes from being driven into SIM from a third-party system.

Related Documentation

For more information, see the following documents in the Oracle Retail Store Inventory Management Release 14.0 documentation set:

- *Oracle Retail Store Inventory Management Installation Guide*
- *Oracle Retail Store Inventory Management User Guide*
- *Oracle Retail Store Inventory Management Online Help*
- *Oracle Retail Store Inventory Management Security Guide*
- *Oracle Retail Store Inventory Management Operations Guide*

- *Oracle Retail Store Inventory Management Implementation Guide, Volume 1 - Configuration*
- *Oracle Retail Store Inventory Management Implementation Guide, Volume 2 - Integration with Oracle Retail Applications*
- *Oracle Retail Store Inventory Management Implementation Guide, Volume 3 - Mobile Store Inventory Management*
- *Oracle Retail Store Inventory Management Implementation Guide, Volume 4 - Extension Solutions*
- *Oracle Retail Store Inventory Management Data Model*

Supplemental Documentation on My Oracle Support

The following documents are available through My Oracle Support. Access My Oracle Support at the following URL:

https://support.oracle.com

Oracle Retail Commerce Anywhere Functional White Papers **(Doc ID: 1598177.1)**

This library contains a collection of white papers that outline functional aspects of the Commerce Anywhere solution in Oracle Retail applications. One document provides an overview of the solution from an enterprise perspective, and it is accompanied by product specific-papers addressing Oracle Retail Merchandising System, Oracle Retail Store Inventory Management, Oracle Retail Warehouse Management System, Oracle Retail POS Suite, and Oracle Retail Advanced Inventory Planning.

Oracle Retail Commerce Anywhere Technical Integration Solution **(Doc ID: 1598187.1)**

This set of architectural diagrams and related business processes depict the Commerce Anywhere solution and its major integration points. The conceptual representation that is depicted is intended to support an integrated implementation of an Oracle Retail Commerce Anywhere solution that includes Oracle Retail Merchandising System, Oracle Retail Store Inventory Management, Oracle Retail Warehouse Management System, Oracle Retail POS Suite, and Oracle Retail Advanced Inventory Planning.

Enterprise Integration Guide (located in the Oracle Retail Integration Suite library on the Oracle Technology Network)

The Enterprise Integration Guide is an HTML document that summarizes Oracle Retail integration. This version of the Integration Guide is concerned with the two integration styles that implement messaging patterns: Asynchronous JMS Pub/Sub Fire-and-Forget and Web Service Request Response. The Enterprise Integration Guide addresses the Oracle Retail Integration Bus (RIB), a fully distributed integration infrastructure that uses Message Oriented Middleware (MOM) to integrate applications, and the Oracle Retail Service Backbone (RSB), a productization of a set of Web Services, ESBs and Security tools that standardize the deployment.

Oracle Retail Store Inventory Management Upgrade Guide **(Doc ID 1598606.1)**

This guide describes the approach that Oracle Retail Store Inventory Management takes for the upgrade process from the previous line of code, as well as discussing upgrade assumptions and considerations.

Supplemental Training on My Oracle Support

The following document is available through My Oracle Support. Access My Oracle Support at the following URL:

https://support.oracle.com

Release Readiness Transfer of Information (TOI) Recordings (Doc ID 732026.1)

Online training is available to Oracle supported customers at product release. These online courses provide release-specific product knowledge that enables your functional and technical teams to plan, implement and/or upgrade and support Oracle Retail applications effectively and efficiently. Note that Oracle Retail products with minor updates often do not have an associated TOI.

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