

Oracle® Retail Merchandising System

Release Notes

Release 16.0

E82627-01

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This document highlights the major changes for Release 16.0 of Oracle Retail Merchandising System (RMS).

Overview

RMS is used to execute core merchandising activities, including merchandise management, inventory replenishment, purchasing, vendor management, and financial tracking. Oracle Retail Trade Management (RTM) is used to manage the import process, including automating the steps necessary to import goods, managing file exchanges with trading partners, and providing a central database of critical import order information.

For information about Oracle Retail Sales Audit (ReSA), see the ReSA documentation library on the Oracle Technology Network (OTN).

Hardware and Software Requirements

See the *Oracle Retail Merchandising Installation Guide* for additional information about the following:

- Hardware and software requirements
- Oracle Retail application software compatibility

Functional Enhancements

The following functional enhancements are included in this release.

Enhanced User Interface (UI)

Throughout the Merchandising product suite, the focus has been on providing an enhanced user experience through the use of business intelligence (BI) driven workflows, user-centric design, role-based dashboards, and complementary mobile applications all intended to improve overall user efficiency. To deliver these capabilities, Oracle Retail has been adopting a Java platform built using Oracle's Application Development Framework (ADF) within our suite. The re-platform of RMS and RTM from Oracle Forms to ADF continues this evolution.

The benefits of the modernization of merchandising are many, including a reduced total cost of ownership because RMS, RTM, Allocation, ReIM, and ReSA all reside on the same technology.

Additionally, these applications now share a common security model based on roles, which allows flexibility for retailers to configure the application at both the screen and task level.

This strategic approach to transforming the user experience retained the market-leading functionality already present in the application, while leveraging the modern architecture to drive efficiency and personalization. As part of this transition there was also a focus on minimizing data model changes in RMS and RTM to facilitate upgrades and reduce the impact to integration.

For more information, see the latest *Oracle Retail Merchandising System Users Guide*.

Exception-based Retailing

In Release 16.0, RMS provides support for integrated role-based dashboards, which are a key part of the ADF platform.

These dashboards focus on the key users of RMS and raise exceptions to the users to help them identify and prioritize their work. For example, the system highlights to a buyer the purchase orders that are awaiting his or her approval or identifies inventory discrepancies for an inventory control analyst.

Reports provide quick action options to resolve the discrepancy from the dashboard itself, such as the ability to update order dates for late shipments, or the ability to launch from the dashboard to a transaction for further actions or review.

Each of the dashboards and reports included as part of the release is intended to be a point of view into some of the most common roles in RMS. However, the framework is also designed to be configurable. Retailers can match the reports to how they define their roles and build their own dashboards as needed.

The dashboard reports provided in the release are built leveraging the Application Development Framework Data Visualization Tools (ADF DVT) and are included as part of the application license. Retailers can also use the framework provided to build reports in their preferred technology, or even link to other sources, such as a news or social media feed

For more information, see the *Oracle Retail Merchandising System Operational Insights User Guide* and the *Oracle Retail Merchandising System Operations Guide, Volume 3*.

In-context Reports

The new platform for RMS provides a contextual pane for RMS screens. This contextual pane is a collapsible section to the right of the application screen that allows for an extension of information available in the associated task flow, to provide further details about a transaction or entity that is not present on the screen. The reports dynamically refresh when certain actions (called contextual events) are performed on the task flow.

Similar to the dashboard reports that are packaged with the RMS application, RMS provides several reports with the base application, such as an Item Details report that displays additional attributes about an item in the context of an order, transfer, or stock count, or an Order Summary report that shows a summarized view of the cost and retail of an order in the context of an order search.

This framework also provides an area of extensibility for retailers who wish to add reports in task flows that do not have reports as part of the base product or who wish to add reports to those in task flows that already support them.

For more information, see the latest *Oracle Retail Merchandising System Operational Insights Users Guide*. For more information on the triggering events and parameters, see the *Oracle Retail Merchandising System Operations Guide*.

Mobile

Increasingly, retailers are looking for ways to increase their productivity, both in the office and on the go. Although not practical to attempt to execute all retailing activities on a mobile phone, there are opportunities where retail personnel would like visibility to key processes and to perform time-critical business functions away from the desk.

In Release 16.0, two new mobile flows focused on RMS functionality are being released, adding to those that were released previously for Oracle Retail Sales Audit (ReSA), Oracle Retail Allocation, and Oracle Retail Invoice Matching (ReIM).

The first, Recent Orders, allows the user to view open purchase orders at a summary and detail level, as well as to approve orders en masse, update dates, and cancel orders. The application also allows users to send an e-mail related to the data they are viewing in the mobile application, with a hyper-link to allow users to launch into the order in context from their desktop.

Additionally, Recent Transfers, similar to Recent Orders, allows a user to view and approve one or more open transfers at a summary and a detail level based on the entry of a set of search criteria. The application also includes the ability to send an e-mail based on the data being viewed that includes a hyper-link to open the transfer from their desktop.

For more information, see the Mobile Merchandising documentation library on the Oracle Technology Network.

Notifications

In addition to leveraging dashboards, RMS now uses the notifications feature that was originally introduced in Release 16.0 of Oracle Retail Allocation. This feature, configurable by user role, highlights when various events occur in the application and provides the user with information about the event, as well as a hyper-link into the application to review more details. For example, if a purchase order that had been submitted for approval is rejected back to worksheet status, the creator of the purchase order can be notified, so that he or she can correct any issues with the order and resubmit it. RMS provides a set of pre-configured notifications, but flexibility also exists for retailers to define their own

For more information, see the latest *Oracle Retail Merchandising System Implementation Guide*.

Functional Simplification

As part of the RMS modernization effort, RMS functionality was reviewed for areas that could be simplified. One of these areas considered was functionality in the system that was no longer required, due, for example, to redundancy with other Oracle Retail application functionality or to the fact that the particular functionality was better supported through other technologies or solutions. Removing these redundant functions should simplify RMS implementations because less time is now required to analyze the use of functionality that is better suited to other solutions.

The following table provides a list of the areas of functionality removed from the application with this release:

Area	Notes
POS Configuration	Removed functionality for managing Pay In/Out, Money Orders, POS Touch Buttons, Supplier Site Payment Types, POS Resend. These are generally handled in a POS application such as Oracle Retail Xstore. Simplified handling of Tender Types to only hold data needed for ReSA.
Service Confirmation	A function better suited for an application running in the store, this functionality was intended to allow stores to be able to confirm that a service for which an invoice was received was actually performed (for example, a third party is hired to plow snow in a store's parking lot, and so on).
US Sales Tax Configuration	Supports only basic US sales tax requirements, not the complex taxes that exist today (for example, tiered taxes, maximum basis taxes, and so on). Infrequently used because third-party solutions are better equipped to not only manage the tax information, but also to integrate with a POS and perform tax calculations.
Regionality	Tables and screens unused in RMS.
Open to Buy Forward Limits	Replicates planning functionality intended to help buyers to not spend their open to buy (OTB) budget too quickly. Basic tracking of spend against an OTB budget in RMS remains unchanged.
Location Traits Above Store	Traits were able to be associated at the district, region and area levels of the organizational hierarchy, but are only used at the store level.
Custom Attributes	Formerly available for item, supplier, store and warehouse, these attributes were intended to be customized to house any retailer specific attributes. However, they do not drive any functionality in RMS without customization. This functionality has been replaced by the Custom Flex Attribute Solution (CFAS), which is available in more areas and is more flexible.
Store Department Area	Replicates space management functionality used to track the square footage for a department in a store and was informational only in RMS.
Warehouse/Store Assignment	No longer used to drive any functionality with the removal of US Sales Tax Configuration and the changes made to Oracle Retail Allocation in Release 15, that use the sourcing information at the item/location level in RMS instead.
Stop Shipments, Shipment Schedules, Warehouse Blackout	Has been replaced by Location Closings and Location Shipment Schedule functionality.
Printer Maintenance	Allowed one or more printers to be set up for a user and used only in older versions of RMS, prior to reports being available in BI Publisher.
Table-level Audit	Functionality replaced by more robust audit capabilities available in the database.
Bill-to Location	Previously used to determine the VAT region of a location for evaluated receipt settlement (ERS) or direct store delivery (DSD) invoices; the functionality has been replaced through the use of the invoice location on the order.

Area	Notes
ORPOS and 3rd Party POS Integration	The MOM to Oracle Retail Xstore POS Suite integration, introduced in Release 15.0, is more robust and complete in terms of attributes shared with store locations. In addition, Oracle Retail has moved the ORPOS Suite into a sustaining engineering mode. Note that the Xstore POS Suite integration also replaces methods for other third-party POS applications.

Enhanced Data Loading Capabilities

In Release 15.0, RMS introduced the ability to manage foundation data elements using spreadsheets to upload and download additions, updates, and deletes for data elements that are slow moving or rarely change after initial implementation. This function, however, was only accessible via a ReSA screen. In Release 16.0, this functionality has been split back out into RMS and ReSA foundational data, with the RMS elements managed using RMS screens, and the ReSA foundation data managed in the ReSA screens.

The RMS capabilities were also expanded to include even more data elements, such as CFAS and data security administration, and also areas that previously required database scripts to load, such as brand, calendar, and PO types. This design is intended to simplify the initial load of foundation data, as well as ongoing maintenance, by reducing the need for retailers to build scripts to maintain this data or to manually key in the information in the RMS screens.

Cost Change Induction

When Item Induction was originally introduced in Release 14.1, it included the ability to create and update cost changes. In Release 16.0, this functionality still exists, but has been separated out as a different process from Item, so that separate privileges can be assigned to various user roles. Additionally, enhancements were made to the cost change functionality to utilize the tolerances defined by supplier site to determine whether a cost change can be approved when uploaded.

Custom Flex Attribute (CFAS) Enhancements

With Release 16.0, the existing CFAS framework continues to be supported in the new technology, but with some key enhancements. The CFAS framework has been extended to support new functional areas, including partners and order item, order item/location, diff types, and cost changes. Additionally, three date fields were added for each group, taking the total attributes that can be defined for each group from two dates to five, and the code values used for this function were moved from a separate set of tables to the main code head/detail tables used in other areas of RMS. The CFAS framework also supports the maintenance of entities, group sets, and groups using the data loading capability described above.

For more information, see the latest *Oracle Retail Merchandising System Custom Flex Attribute Solution Implementation Guide*.

Configurable Rules Enhancements

Configurable rules functionality, initially introduced in Release 15.0 for Item and PO approval, has been extended to other functional areas, including the following:

- Item Submit

- Purchase Order (PO) Submit
- Transfer Submit and Approval
- MRT Submit and Approval
- RTV Submit and Approval
- Inventory Adjustment Creation
- Cost Change Submit and Approval
- RTM Finalizations
- Replenishment Attribute Activate and Deactivate
- Supplier and Partner Activate and Deactivate

This functionality allows retailers to define their own custom rules that are triggered alongside RMS validations in these areas. For more information, see the latest *Oracle Retail Merchandising System Implementation Guide*.

Translation

Translation functionality has been enhanced to include store translations based on entity-specific data, such as using the item ID as a reference for translated item descriptions. This new approach replaces the former string based approach.

The new framework also supports the ability for user-interface labels to be easily updated to use terms that make the most sense to the retailer throughout the application. Additionally, translation capabilities have been added to the applicable entities that are supported by the Data Loading capability, and have been added for Item Induction, to support the ability to upload translations from a spreadsheet from an external source to be used in RMS.

Additional Enhancements

Virtual Warehouses for Commerce Anywhere

Support has been added for virtual warehouses in integration related to customer ordering in RMS. Previously, all processing assumed that an order management system would communicate in terms of physical warehouses only.

Supplier Sites

The option to enable or disable supplier sites has been removed. Supplier sites are now always required. If not used, then a one-to-one relationship can be created. Note: Deals maintained at a supplier level as with previous releases.

Technical Enhancements

The following technical enhancements are included in this release.

Enhanced Security

Security within the RMS application has been changed to align with the ADF role-based security model present in other Oracle Retail ADF applications. Privileges within the application are mapped to job duties, which in turn, are grouped into job roles. The application is delivered with preconfigured job roles, based on the most

common users of the application, but can be configured by retailers using the Oracle Retail Application Administration Console (ORAAC), a user interface that supports the creation of roles and duties, as well as updates to the mapping of privileges to duties and duties to roles.

This security model supports a lower level of application security than was previously supported and has the added benefit of sharing a model across all ADF merchandising applications.

Data security and filtering continues to be managed using the RMS organization and merchandise hierarchies and order approval limits by role from earlier releases. However, changes were made to use the application user ID, rather than the database user ID, in order to configure this functionality.

For more information, see the latest *Oracle Retail Merchandising Implementation Guide* and the latest *Oracle Retail Merchandising System Operations Guide, Volume 3*.

Active Retail Intelligence Retirement

Active Retail Intelligence (ARI) was a productivity-enhancing tool that worked in combination with the Oracle Retail Merchandising System (RMS). Driven by business rules set by the user, ARI monitored business activities in real time and provided proactive exception management that could identify opportunities, recommend courses of action, and automate routine tasks. Because ARI was also an Oracle Forms-based application, and because there are a number of other Oracle tools, such as Oracle Business Process Management Suite, with more robust capabilities in this area, ARI has been retired with this release.

Automated Test Scripts

Oracle Retail Merchandising Test Automation, while not part of the supported RMS application itself, is a tool that is intended to help customers with 'regression testing' patches and upgrades of RMS. This solution also provides a starting point for retailers to develop their own automation tests.

These scripts are provided free of charge to all retailers who have an RMS license and have licensed the Oracle Application Test Suite (OATS).

For more information on downloading and configuring these scripts and for detailed documentation about this solution, see the Oracle Test Starter Kit Accelerator Scripts at:

www.oracle.com/technetwork/oem/downloads/index-084446.html

Other Technical Enhancements

Conversion Scripts

Updates were made to the conversion scripts provided by RMS to use SQL Loader. This modification also resulted in splitting some of the larger scripts into smaller individual components.

Online Help

RMS now references cloud-based online help, which allows retailers to ensure they are referencing the most up to date User Guide content via the Online Help.

Integration Enhancements

The following integration enhancements are included in this release.

Oracle Commerce Retail Extension Module (RXM) Integration

An additional module is available in the Oracle Commerce application that creates a unified shopping experience merging the capabilities of the digital store with the physical store. This module ensures that sales associates and/or other consumer-facing users and applications have access to the same information, such as customer, order, item, inventory, and price.

Although the solution is not part of the merchandising suite of Oracle Retail applications, RMS provides foundation data, such as hierarchies and locations, as well as items, locations, and inventory for both stores and warehouses to support this extension module. This new integration leverages a new integration structure called Bulk Data Integration (BDI), which facilitates the transfer of large data sets between applications.

For more information, see the Oracle Commerce Retail Extension Module documentation set on the Oracle Retail Technology Network.

For information on RMS's use of BDI, see the latest *Oracle Retail Merchandising System Operations Guide, Volume 2*.

AIP Integration Updates

Updates were made to RMS's integration with Oracle Retail Advanced Inventory Planning (AIP) to support the ability to create store-to-store transfers. From the RMS side, these modifications updated existing processes that send transfers 'in the well' and in-transit from RMS to include store-to-store transfers. Changes were also made to accept store-to-store transfers sent from AIP.

Price Execution Subscription

A new subscription API was added to RMS to support retailers who manage pricing in a system other than Oracle Retail Price Management (RPM). This functionality allows retailers to continue integrating regular and clearance price changes into RMS to ensure that the retail value of inventory is accurate, when a price change goes into effect. Initial pricing in this type of configuration is managed based on the markup percentage defined at the department level in RMS.

For more information, see the latest *Oracle Retail Merchandising System Operations Guide, Volume 2*.

Known Issues

The following known issues remain in this release.

Known Issue/Defect	Defect Number
When a page is opened with the contextual area collapsed and then the user later opens the contextual area, the contextual reports will be empty until the user takes some action that would cause the contextual reports to refresh.	24732647, 25114546, 25119585

Known Issue/Defect	Defect Number
Entering a partial description for an item in an RMS screen and then clicking the LOV button does not persist the partial description into the LOV, causing the user to need to re-enter the description in the LOV to limit the results.	25133009

Related Documentation

For more information, see the following documents in the Oracle Retail Merchandising System Release 16.0 documentation set:

- *Oracle Retail Merchandising System Installation Guide*
- *Oracle Retail Merchandising System User Guide and Online Help*
- *Oracle Retail Merchandising System Custom Flex Attribute Solution Implementation Guide*
- *Oracle Retail Merchandising System Operations Guide*
- *Oracle Retail Merchandising System Data Model*
- *Oracle Retail Merchandising System Data Access Schema Data Model*
- *Oracle Retail Merchandising Security Guide*
- *Oracle Retail Merchandising Implementation Guide*
- *Oracle Retail Merchandising Data Conversion Operations Guide*
- *Oracle Retail Merchandising Batch Schedule*
- *Oracle Retail Xstore Suite Merchandising Implementation Guide*
- *Oracle Retail Merchandising System Users Guide*
- *Oracle Retail Operational Insights User Guide*
- *Oracle Retail Merchandising System Release Notes*
- Oracle Retail Sales Audit documentation
- Oracle Retail Trade Management documentation

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 Merchandising Operations Management Upgrade Guide 16.0 (Doc ID 2184520.1)

This guide describes the approach that each Oracle Retail Merchandising Operations Management application takes for the upgrading process, as well as its upgrade assumptions and considerations. Actual procedures for the upgrade may be included in the application's Installation Guide.

Oracle Retail Merchandising Mock Installation Test Cases 16.0 (Doc ID 2184521.1)

The tests in this document have been created to assist in verifying (smoke testing) that the installation of the following products was successful: RMS, ReSA, RTM, Oracle Retail Allocation, ReIM, and RPM. These tests are not intended to verify all functionality in the suite of products previously listed.

Oracle Retail Merchandising Fusion Applications Customization Guide, Release 16.0 (Doc ID 2018356.1)

This guide helps retailers make modifications to the Merchandising products that use the Oracle Application Development Framework (ADF).

This document covers the recommended approaches for extending and customizing the following Merchandising products:

- Oracle Retail Allocation
- Oracle Retail Sales Audit (ReSA)
- Oracle Retail Invoice Matching
- Oracle Retail Merchandising System

Information is included to help retailers with the following:

- Understand the available types of customization and extension and determine when each should be used
- Learn how to best implement custom components
- Determine how to effectively leverage seeded customization
- Identify the areas that are not recommended for customization

Supplemental Training

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

<https://support.oracle.com>

Transfer of Information (TOI) Material (Doc ID 732026.1)

For applicable products, online training is available to Oracle supported customers. 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.

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Access to Oracle Support

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Value-Added Reseller (VAR) Language

Oracle Retail VAR Applications

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