Oracle® Retail Store Inventory Management

Release Notes

Release 13.1

June 2009

This document highlights the major changes for Oracle Retail Store Inventory Management (SIM) Release 13.1. SIM 13.1 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 generated its own transfers.
- 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 13.1 release is focused on functional, integration, and usability enhancements, along with critical technical improvements. Enhancements are described in more detail in the following pages of these Release Notes.

Functional Enhancements

- Stock counts redesign
- Role-based security
- Simple pack breakdown
- Printing of multiple reports
- Viewing reports in a Web browser
- Filter upgrades for lists throughout the application
- Sequencing width display
- Item request commits
- Inventory adjustment improvements
- ASN lookup for warehouse deliveries

Technical Enhancements

- Improved stability by decoupling SIM from direct integration with RIB
- Real-time logging control on both server and client
- Record locking – view mode
- Additional Web service support for customer order inventory
- Enterprise database rationalization (consistent store and item IDs)
- Helper upgrade scripts to upgrade from SIM 13.0.2
- Translatable reports
- Ability to print to both ticket and standard printers
- Ability to print labels and tickets through Oracle BI Publisher on Zebra printers

Integration Enhancements

- Customer order inventory reservation
- Item requests with multiple day delivery slots
- Item Basket – Item list enabled for Web service
- Supplier case-level receiving
- Consignment and concession item information
- Store GMT setup with RMS
- Item country of manufacture
- Multiple supplier addresses

Documentation Enhancements

- Improved Implementation Guide
- Online help in Oracle Help for the Web format

Functional Enhancements

The following are the major functional enhancements for SIM 13.1.

Stock Count Rewrite

Stock counts have been enhanced to be much more flexible, handle more volume, and support a wider variety of business practices. SIM is updated with the following functional changes.

System Setup

- Items that are not counted have their count values set to zero. This allows missing items that are not scanned to have their stock on hand corrected to zero.
- The stock positions of non-discrepant items within variance can be updated if they are on the count.

Product Group Setup

- Partial third party stock counts allow the third party counter to count a subset of data, instead of the entire store.
- The counting method can be determined flexibly by stock count. In the product group, you can determine whether the count should be a third party count, an unguided stock count, or a guided count.
- Merchandise hierarchy breakdown of stock counts can be done by department, class, or subclass.
- There is an optional automatic authorization process for any type of stock count.
- It can be determined which items need counting:
  - Item location status: Active, Inactive, Discontinued, Deleted
  - Stock on hand position greater than, less than, or equal to zero

Stock Count Processing

- All stock counts follow a similar procedural and processing path.
- Individual unit and amount stock counts are kept together under a single master stock count.
- Stock count reports can be printed without taking the snapshot.
- Unit counts can be saved on the PC.
- Filtering can be done by merchandise hierarchy, and for counted or uncounted items.
- The product group setup for an item can be viewed in the stock count dialog.
- Authorization, with filtering options, is based on merchandise hierarchy and variance.

Future Stock Count Visibility

- You can view stock counts that are not yet extracted within a data range you specify.
- You can view details of future stock counts and print item reports.

Handheld

You can list uncounted items and allow them to be added to the count.

Role-Based Security

The SIM security model has been completely updated, allowing for generic role/privileges authorization. Over a hundred individual privileges were added; these can be assigned to customer-configured roles in SIM.

These are some highlights of privileges that can be assigned:

- Different authorizations for the handheld and PC
- Product group type (stock count, pick list, item request)
- Return source (supplier or warehouse)
- Inventory adjustment reason code (for each reason code)
- Different privileges to create or dispatch or confirm transactions

Simple Pack Breakdown

To support customers who order in packs but sell items at different levels, SIM has been upgraded to track inventory at the component level for these items.

An example is the purchase of soft drinks. In many countries, the retailer purchases soft drinks with 6, 12, or 24 cans for each pack. SIM would normally track this inventory at the pack level, because the packs are sellable; however, in many countries, it is a general practice to also sell individual cans of soft drinks. Because both the retailer and the customer can break open a pack, there is no good inventory control at that pack level.

The new functionality allows the retailer to specify whether to monitor the items at the pack or individual item level. SIM has also a feature that allows the retailer to see the hypothetical number of packs they could have on hand if none of them were broken down.

There are some features:

- Receiving at pack level
- Indicator at simple pack level to keep inventory at pack or component level
- Indicator at simple pack level to calculate hypothetical pack inventory
- Pack component inventory display

Printing of Multiple Reports

In many cases, a single report does not satisfy all printing or viewing requirements. SIM provides a generic dialog through Oracle BI Publisher that allows you to select any reports created in the system, but this can be overwhelming if there are many different reports.

This new PC feature provides greater user efficiency, by allowing you to identify multiple reports for a single functional area. You can then select to print or view a single report or multiple reports.

This can be useful for tasks for which different reports could be printed: for example, to print a label for a container and a bill of lading for the contents.

Filter Upgrades

All the filter windows in SIM are embedded pop-up windows. This allows a faster system response, because SIM does not have to load a new filter window. It also allows easier code maintenance.

All buttons have been made consistent across all filter screens as well, allowing for a more consistent user experience. In addition, for every list screen where a filter can be used, the user can see a summary of the filter currently applied.

Other Usability Enhancements

The following are other SIM 13.1 usability enhancements.

Sequencing Width Display

Most plan-o-gram tools include a width value for the sequence display. This value indicates how many items you can place across the shelf for display purposes.

The micro item list and edit windows display the Width field. In the edit window, you can define the width for each item.

Similarly on the handheld, you can define the width on the same screen where you define the capacity.

Item Request Commits

If the handheld connection failed, users would lose all the work done since the last time they saved. This new feature commits every single item scan to the database, increasing user efficiency in case of wireless network outages.

Inventory Adjustment Improvements

You can print inventory adjustments, and you can have the reason code defaulted. A default reason code increases efficiency by not requiring each reason code to be redefined.

SIM also has a new inventory reason code setup window. This enhancement prevents you from setting up invalid reason codes, or accidently breaking existing reason codes by entering them in the database.

ASN Lookup for Warehouse Deliveries

In addition to lookup by carton ID, SIM now also provides the option to search warehouse deliveries by entering the ASN number (on the PC).

Elimination of Supplier Cost Field

The supplier cost field is removed from the price window to reduce user confusion and to ensure that store personnel are not made aware of the primary supplier cost when creating price changes.

Technical Enhancements

The following are technical enhancements for SIM 13.1.

Upgrading to SIM Release 13.1

For new customers, SIM 13.1 is a base release (a full product installation). Current customers who have installed SIM 13.0.2 also have the option to upgrade to Release 13.1. For information about upgrading, see the following document at My Oracle Support (formerly MetaLink) at the following URL:

https://metalink.oracle.com

Oracle Retail Upgrade Guide (Doc ID 837368.1)

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.

Oracle Database Upgrade

For Release 13.1, SIM and other Oracle Retail applications are supported with Oracle Database 11g (11.1.0.7). See the *Oracle Retail Store Inventory Management Installation Guide* for complete information about requirements for your operating environment.

Decoupling SIM

The decoupling framework isolates integration code. It consists of staging tables for both inbound and outbound messages. It has a polling framework with multi-threading support and an administrative interface to interact with staged records.

This new feature provides additional uptime and stability in SIM, by not requiring the RIB server to run when confirming transactions.

Real-Time Logging on Both Server and Client

SIM allows logging on the server without restarting the server. This functionality has now been extended to the client as well. The user can turn on client logging and turn it off whenever needed.

Record Locking - View Mode

If a user has a record lock and a second user does not want to break the lock, the second user continues in view mode. The second user can see all details, but cannot not make any changes.

Added Service-Oriented Architecture Services

With the SIM 13.1 release, the SOA footprint is extended further. Changes have been made to the Item Inquiry Web service to support the breakable pack information.

SIM now supports services that can update inventory information. The Customer Order Inventory Web service allows the reservation of inventory and subsequently generates an inventory message to RMS.

A third Web service family allows external systems to pull item baskets containing items and quantities from SIM.

Other Technical Enhancements

The following are additional SIM 13.1 technical enhancements.

Enterprise Database Rationalization

SIM has updated its store IDs to 10-character values and item IDs to 25-character values, to conform to the lengths used throughout the enterprise.

Translatable Reports

Reports can now be translated into multiple languages.

Label and Ticket Printing from Oracle BI Publisher to Zebra Printers

SIM 13.1 was tested for printing labels and tickets on a Zebra label and ticket printer. Zebra has the ZebraLink Enterprise Connector (ZEC) that interprets and converts XML formatted labels to the Zebra-ZPL (Zebra programming language) format understood by Zebra printers.

For testing, Oracle BI Publisher was configured to send XML output, which can be picked up by ZEC and sent to Zebra printers. ZEC works with a broad range of Zebra printers. For details on configuration and support, search for related documents on My Oracle Support (formerly MetaLink).

Integration Enhancements

The following are SIM 13.1 integration enhancements.

Customer Order Inventory Reservation

SIM 13.1 incorporates new functionality to reserve inventory tied to customer transactions. Reservation of customer inventory is important to ensure that replenishment has the most accurate numbers about how many units are available in the store. The availability of a Web service and batch process to reserve this inventory allows more accuracy and efficiency when creating customer transactions for which the inventory is not immediately picked up.

Customer inventory can be reserved for different reasons and through different applications, as follows:

- Point-of-sale (POS) systems

  Some sales transactions are not immediately picked up because the customer has to hire a delivery person, or they need to move their vehicle to the loading dock (for example, at home improvement or furniture stores). When these transactions are created, a real-time Web service call can be made to SIM to reserve the inventory. The inventory is moved to a special unavailable status that can only be changed through another Web service call from a point-of-sale system when the inventory is picked up.

- Oracle Retail Sales Audit (ReSA)

  If a third party POS system is used and you do not want to invest in a real-time Web service architecture, SIM and ReSA can still reserve customer inventory through a batch process. In addition to the previous example, this interface can also handle layaway transactions, or any other customer reservation transaction that ReSA can pass to SIM.

- Third party systems

  Third party systems can also use the Web service for a variety of tasks that are not supported in the base products. For example, it would be possible to reserve store inventory from a customer order management system. This same system would then be used when the item was picked up at the store.

These are some features:

- Real-time (Web service) and batch-driven (trickle or nightly) reservation of inventory
- Display of limited order information for traceability purposes in the store (type of order, order ID, quantity)
- Accurate available inventory positions in both SIM and RMS
- Audit trail tracking all changes

Item Requests with Multiple-Day Delivery Slots

Many grocery retailers create item requests for items with multiple deliveries per day for the same item. In the morning, doughnuts should be delivered, for lunch sandwiches are needed, and in the evening hot prepared meals are required.

The Item Request dialog in SIM is enhanced to allow you to select for items on Store Order type replenishment which delivery slot should be filled.

This delivery slot information is communicated to RMS, where replenishment can run multiple times a day and provide the transfers to the warehouse for a timely delivery.

These are some features:

- Selection of time slot for store order replenished items
- RIB available time slot integration
- Default time slot for more efficient use
- Transfers displayed with time slot

Item Basket – Item List Enabled for Web Service

Item Basket functionality allows the SIM handheld user to create a list of items with quantities associated. This list can be requested by external systems that have a specific Item Basket ID and conform to the basket type. For example, a POS can use the list for line-busting purposes.

Because of the Web service flexibility, SIM can be integrated with third party tools that can use it for their own purposes, because of a type that is associated with the Item Basket. As an example, a wedding registry application could use the SIM handheld to allow customers to browse and select items in the store.

This functionality can also be used internally with SIM to create a list of items that can be printed at the end of the day.

These are some features:

- Handheld-specific application
- Add, delete, edit functionality
- Recall and delete Item Basket functionality
- Configurable Item Basket Type assignments
- Flexible, system- or user-defined unique ID recall feature
- Automatic purging

Supplier Case-Level Receiving

Some suppliers require orders to be placed at the case level, and they invoice and deliver at the case level. Oracle Retail 13.0 and prior applications are configured to work at the individual (each) item level. This SIM enhancement allows specified suppliers to create ASNs and deliver at the case level. All the information communicated and received from these suppliers is assumed to be at a case level.

These are some features:

- Supplier-specific indicator set up in RMS
- All ASNs and deliveries automatically defaulted to case for these suppliers

Consignment and Concession Item Information

To prepare SIM for trade-based inventory management in a future release, SIM now subscribes to and displays inventory information about consignment and concession items. Because these items usually do not have inventory, there was previously no need to support them.

With SIM 13.1, it is possible to look up these items; however, it is not possible to perform any inventory transactions with them.

SIM allows consignment and concession items in the following dialogs: Item Lookup, Item Basket, Customer Orders, Pricing, and Sequencing.

Other Integration Changes

The following are additional integration enhancements in SIM 13.1.

Store Time Zone Setup

When new stores are created, SIM subscribes to the new time zone store information, reducing the database administrator's involvement in setting up time zones manually.

Item Country of Manufacture

The ticket dialog in SIM has been enhanced to display the country of manufacture. This allows printing of tickets and labels with country of origin or manufacture information, if it has been setup in RMS.

Multiple Supplier Addresses

Suppliers can have different addresses for different purposes. SIM subscribes to all the different address types that are published by RMS.

Documentation Enhancements

Oracle Retail Store Inventory Management Implementation Guide

The *Oracle Retail Store Inventory Management Implementation Guide* now has in three volumes.

The first volume, Architecture and Administration, provides information about the architecture and administration of your SIM implementation, as well as information about configuration and customization of your SIM implementation.

The second volume, Integration Information, addresses the technical and functional integration of SIM with other products.

The third volume, Mobile Store Inventory Management, introduces workflows describing the use of the new Mobile Store Inventory Management handheld device, which allows users to perform many traditional SIM tasks on the go.

This enhanced documentation set better fulfills the specific information needs of distinct audiences.

Oracle Help for the Web

The SIM 13.1 Online Help has been upgraded to the Oracle Help for the Web technology. Oracle Help for the Web is a Java servlet and file format specification for delivering HTML-based help in a Web environment. A single installation of the help is managed on a single server. You view and navigate help content through your default Web browser. The help display includes tabs for features such as Contents, Search, and Index that help you locate and navigate to a help topic easily.

Known Issues

The following are known issues in SIM 13.1:

- Clearance price changes - A date modification of an existing clearance in RPM results in adding a new clearance in SIM, instead of updating the existing one. This can lead to inaccurate clearances being executed in SIM.
- Item lookup Details tab - When adding an item to a transaction on the PC, the user is required to select an item before looking up the details. If no item is selected and the user selects the details tab, SIM returns an error. The workaround for this issue is to ensure that the user selects an item before looking up any details of the item. This error only happens on the PC.
- Integration - SIM 13.1 is not integrated with Oracle Retail Strategic Store Solutions applications.

Related Documentation

For more information, see the following documents in the Oracle Retail Store Inventory Management Release 13.1 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*

See also:

- Oracle Retail Integration Bus documentation
- Oracle Retail Service Layer documentation