Oracle® Retail Store Inventory Management

Release Notes

Release 15.0

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This document highlights the major changes for Release 15.0 of Oracle Retail Store Inventory Management (SIM).

Overview

Oracle Retail Store Inventory Management is a mobile, PC, and tablet dashboard based inventory management application. SIM increases store efficiency by helping store associates to execute and monitor all store inventory transactions, which allows 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 Xstore), and warehouse systems (such as Oracle Retail Warehouse Management System).

Accurate inventory is especially important in an Omni-channel setting, which SIM can fully support by providing accurate near real-time inventory positions to Customer Order systems as well as provide efficient pick, pack, and ship functions.

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 15.0 for information about the following:

- Hardware and software requirements
- Oracle Retail application software compatibility

Functional Enhancements

The following functional enhancements are included in SIM 15.0:

Commerce Anywhere

A transfer picking flow is added to the handheld. Users can use this dialogue to pick quantities that need to be shipped to other stores for customer orders.

These picked requests can, in a later stage, be added to the outbound shipment for packaging.

For more information, see the *Oracle Retail Store Inventory Management Implementation Guide, Volume 3 - Mobile Store Inventory*.

Store Inventory Efficiency

These enhancements improve store inventory efficiency.

Internal Shipping and Receiving

The shipping and receiving process to a warehouse, store, and external finisher are aligned in 15.0. This change allows the retailer to have a more efficient process, since there are fewer inconsistencies between shipping and receiving to/from different locations types.

Some of the major changes include:

- The ability to ship and receive containers from store, warehouse, and finisher.
- Assignment of multiple transfer documents to a container.
- Assignment of multiple containers to a single shipment.
- The separation of the logical transfer document with the physical shipping document.
- Receiving at the delivery (Advanced Shipment Notice (ASN)), container level, and item level.
- Automatic request approval.
- Inventory updates at the container level.

Transfer Document

Store, merchandising, and supply chain systems create logical documents that indicate to systems, such as SIM or a warehouse system, what needs to be shipped or received. These logical documents give an intent of what needs to be shipped, but do not necessarily map one to one to how the shipment is constructed or even if they can be fully filled by the shipping location.

To facilitate this inventory control process as well as align better with the logical versus physical business process, a new transfer document dialogue is introduced.

The transfer document dialogue has the following features:

- Request creation from both SIM and an external system, such as a merchandising system, for outbound shipments from a store.
- A formal approval or rejection of transfer requests.

- A new handheld workflow to facilitate the processing of requests. It allows the user to pick inventory based on the requested quantities. This picking flow follows the same pattern for customer order picking or in store replenishment ensuring a consistent process. This can be especially useful for Commerce Anywhere shipping requests where the user pre-packages the shipment by printing out a picking report, picks the items from the shelf, and actually physically confirms that the store has the inventory available.
- Transfer requests can be auto-approved in the case of tight inventory control from corporate. This auto-approves the request for the requested quantities.
- External systems can also generate transfers and transfer requests for unavailable inventory. In some cases, inventory is marked unavailable because it is defective, recalled, or needs to be reallocated. In those cases, the external system could ask SIM to ship directly from the inventory marked unavailable. This shipment can be either to a store, external finisher, or warehouse.
- It is possible to create transfer documents with a not after ship date that is auto-defaulted and has several notifications in place to ensure that the transaction is fulfilled in time.
- Requesting users are able to indicate if the whole transfer needs to be shipped, or if it is allowed to partial ship.
- A comprehensive view is available on what has been shipped, received, and with details about the shipment record such as which item was shipped on which container.
- Automatic document close when the not after date is reached.

Transfer Shipping

Shipments to store, warehouse, or external finishers are under a single new dialogue. This new dialogue focuses on building a single shipment to a single entity containing one or more containers.

Each container is considered its own logical unit of work and has specific features:

- Each container can be managed by a different user. This allows multiple people to work on a single shipment at one time.
- Containers can be marked for available or unavailable inventory. The user can select specific reason codes for each unavailable container in a shipment.
- Labels for containers can be generated by SIM, or can be manually entered. SIM follows the SSCC-18 standard when generating labels. The retailer can define different container labeling formats and print them as needed.
- If the retailer is not printing internal labels, it is possible to get a tracking ID from a manifesting system or manually enter one.
- It is possible to have multiple transfer documents on a single container, or to reference the same transfer document across multiple containers.
- Different business processes to build a container are supported:
    - Users can enter items on the fly without preselecting a transfer.
    - Users can select an approved transfer document and have different options to apply the items.
- Select just the document and add items to the container validating against the document.

- Add items with the remaining quantities from the transfer document.
- Each container has its own status and user tracking.
- Containers can be restricted by merchandise hierarchy.
- The user can set the entire transaction quickly to cases or Standard Unit of Measure.

Transfer Receiving

Similar to the shipping dialogue, the receiving dialogue merges store, warehouse, and external finisher receiving. The new dialogue is fully container enabled which means that any inbound shipment will have containers.

The new dialogue has the following features:

- The ability to receive at ASN, container, or item level depending on business process.
- Delivery level information such as the freight ID, carrier name, type, address, and license plate can be captured.
- The number of containers can be validated against those physically counted before container or detailed receiving is required.
- SIM inventory is updated when receiving the container. The merchandising system is also notified at a container receipt level.
- Configurations are added to perform blind receiving. In a blind receiving environment, the user does not have the option to see the expected inbound quantities. An exception report and filter are available to allow a manager or user to review the possible discrepant items.
- The handheld quick receiving workflow is updated to receive containers across any ASN, be it store, warehouse, or external finisher.
- The handheld container barcode scanner allows the user to find containers to receive based on the internal SIM container ID, the external container ID, and the EAN128 barcode or external tracking ID.
- Receiving containers marked as unavailable automatically move inventory to the unavailable bucket.
- Container exception processing is added. It is possible to add a completely new container in case containers are delivered that previously were not on the delivery. It is also possible to replicate misdirected containers to the delivery record. In both cases, it is possible to reference an original container ID.
- Tracking can be enabled to record every container scan for quick receiving and item container scan for detailed receiving by user.
- Additional smaller enhancements for container level processing include:
    - The ability to indicate at the container level if it should be received on the shop floor or not. Previously, this was at the delivery level only.
    - Indicate a damaged reason.
    - Mark a whole container as damaged.
    - Enter an external tracking ID or SSCC number.
    - Define at the container header level if the units are displayed at the item or case level.

- A Quality Control indicator (backend only) that forces a user to receive in detail.

- Allocations are handled as true transactions, which means they are not deleted automatically when the ASN is consumed.

DSD Receiving and Purchase Order Document

Similar to the logical transfer document and physical delivery document of transfers, the supplier delivery functionality has two dialogues. The logical Purchase Order (PO) document, which can come from an external system or be based on a delivery, and the physical DSD delivery document.

Deliveries from a supplier include:

- DSD Receiving with a PO and an ASN
- DSD Receiving with a PO, but no ASN
- DSD Receiving on the fly (no PO or ASN)
- DSD Receiving Dex/Nex (no PO, but delivery document)

All of these types support multiple containers per receipt and each of these containers can contain one or more purchase orders. DSD receiving has mostly the same features as those for transfer receiving:

- Receive at the delivery, container, or individual item level.
- Allow multiple users to work in a single delivery with locking at the container level (only single user in a container).
- Perform blind receiving.
- Ability to add unexpected containers on the fly.
- Identify containers by scanning GS1-EAN128, SSCC, tracking ID, or container ID.
- Capture header information for delivering entity, license plate, and freight ID.
- Automatically close the delivery after a certain number of days, and mark the non-received containers as missing.
- Receive individual marked containers on the shop floor.
- Updates to the PO dialogue.
- Capture item and container scan entry by user, location, and time of receiving.

Some specific new features that do not exist on the transfer receiving dialogue:

- PC scan screen that allows quick entry for PO on the fly deliveries by allowing the user to identify a PO number, quantity, and optional cost by scanning an item.
- Restrict the ability to receive against a single PO multiple times.
- Depending on supplier restrictions, allow to receive and update inventory in SIM at the container level, or wait until the entire delivery has been received.
- Capture a total invoice amount.
- Country cost and override cost display for Dex/Nex and delivery on the fly.
- Display of primary VPN.
- Automatic creation of a SIM PO for deliveries on the fly and Dex/Nex.

Return to Vendor (RTV)

Return to vendors has gone through some significant changes as well by separating the logical return to vendor request and approved document from the physical shipping side.

RTV Document

External merchandising systems can create an RTV request document, which is similar to a transfer document. The requested document needs to be approved in SIM. SIM also has the ability to create the RTV document:

- Warehouse returns are removed and moved under the transfer dialogue described before.
- The addition of a header level return reason code for RTV.
- A not after date, which when reached, will not allow the user to ship the RTV.
- The shipping document is separate from the RTV request and approval document.

RTV Shipment

The RTV shipment is a new dialogue that allows multiple users to prepare containers for shipping together to the vendor.

Features of this dialogue are very similar to the transfer shipping dialogue:

- The ability to create an RTV shipment without a prior RTV.
- Default quantities and items to the shipment.
- Default reason for the container when shipping unavailable.
- Container management and labeling works the same as for internal shipments.
- Automatic document close when the not after date is reached.

Some notable differences from transfer shipping:

- Only a single RTV transaction can be associated to a single RTV shipment.
- Unavailable and available can be mixed in the same container.

Bill of Lading

The Bill of Lading (BOL) dialogue is enhanced in several areas to facilitate implementing and increasing the user experience:

- The display format of the address can be customized by country.
- The RTV address can be defined by SIM, or can be integrated from the external system.
- The BOL lists the containers associated to the shipment and their states.
- The motive of all BOLs is now extended through the database by BOL type (transfer, return to vendor, or fulfillment).

Other Modifications

Additional modifications are made to support the container shipping and receiving changes:

- Naming and navigation of functional areas to account for shipping and receiving changes:

- Quick Jump
- Customer Order Management List and Filter
- Item Lookup - UIN Detail and UIN History
- Transaction History List and Filter

- Return Reason Maintenance has become Shipping Reason Maintenance to be used for shipping to stores, supplier, warehouse, and finishers.

For more information, see the *Oracle Retail Store Inventory Management User Guide*.

Tablet Support

A new workbench oriented User Interface (UI) for the tablet is created with focus on the manager who wants to understand what is going on in their store. This UI is based on Oracle's Mobile Application Framework (MAF) 2.x technology. It shows item images where available. The tablet gives access to the most important SIM features as well as provides several business intelligence and operational features:

- Home Page: The Home Page or task list provides the user an up-to-date view of all open transactions for the store:
  - Transactions include stock counts, transfer, transfer shipments, transfer receiving, RTV, RTV shipment, DSD receiving, inventory adjustments, item requests, shelf replenishment, customer orders, customer order pick, customer order delivery, and customer order reverse pick.
  - Selecting a transaction takes the user to the details of that transaction. This is only true for Inventory Adjustments in this release.
  - Transactions displayed to the user depend on the security level given to the user.
- Notifications: The notification dialog consists of:
  - System-generated notifications that are generated from email alerts. These notifications are group assigned, so one user reviewing them can automatically remove them from the list for other users.
  - Ad-hoc notifications can be created by selecting an open transaction and triggering off a notification to a user.
  - Once notifications are read, they are marked to read, and the user also has the option to mark it to unread.
- Item Lookup: The item lookup dialog on the tablet provides the user with the same information as the PC:
  - Look up an item by SKU (item, barcode, GS1, Type 2, and so on).
  - Search for items by different types of criteria similar to the PC: item, supplier, warehouse, finisher, inventory status, UDA, and style. Each of these finds types that contain different fields for identifying the item as well as item, description, merchandise hierarchy, brand, and so on.
  - Item Details include those similar to the PC and tabs may include (depending on the item): Stock on Hand, Pricing, Item Attributes, Ordering Attributes, Merchandise Hierarchy, Stock Locator, UDAs, Non-Sellable, Item Locations, Deliveries, Show Packs, Show Components, Related Items, Customer Orders, UINs, and Additional Suppliers.

- Supplier Lookup: The supplier lookup dialog on the tablet displays the same details as that of the PC:
  - Look up supplier by supplier ID, supplier name, or item ID.
  - Supplier details:
    * Supplier ID, Supplier Name, Status, Returns Allowed, Return Authorization Required, and Delivery Discrepancy.
    * HQ address details.
    * Additional address type details.
- Inventory Adjustments: The inventory adjustment dialogue is fully enabled and has the same features as the handheld or PC inventory adjustment dialogue. Security permissions exist for various features:
  - View an inventory adjustment.
  - Edit an inventory adjustment.
  - Create a new inventory adjustment.
  - Create a new inventory adjustment by applying a template.

    Templates can only be applied on the tablet. They must be created/maintained on the PC.
  - Delete an inventory adjustment.
  - Print an inventory adjustment.
  - Capture extended attributes.
  - Capture UINs.
- Four operational views are created:
  - New Item displays newly received items for a range of dates.
  - Noncompliant Tickets reviews regular price changes going into effect for a specific date and compares them against tickets and labels generated for that date.
  - Expiring Items takes in a date and returns a result if any Use By or Sell By dates match.
  - Out of Stock provides a list of active items with no available stock.

Item Lookup

The Item Lookup dialogue has the following changes:

- The following fields are added to Item Detail and Item Detail popups:
  - Inbound quantity - Total ASN quantity that is currently in transit (PO and Transfer ASN). Note: In Transit has been removed.
  - Ordered quantity - remaining left to be delivered for transfers, allocations, and purchase orders.
  - Next Delivery (date) and Next Delivery type.
  - Next Delivery quantity - the quantity expected.

- Pack Info - In Transit is changed to Inbound. Ordered quantity is updated per the new definition.
- Deliveries tab is added to Item Detail:
  - Lists planned deliveries including: expected date, type, source, inbound quantity, and ordered quantity.

Ticket Printing

Ticket batches can be generated by container for received or inbound containers regardless if the container is related to a DSD or transfer delivery.

The inbound containers ticket batch creation dialogue allows the user to pre-generate tickets and labels before the delivery happens. This can reduce the time it takes to bring items to the shop floor by having them printed the day before.

For both inbound and received containers, the user can limit the list of containers by source and/or date, as well as look up by container ID. The user can sort by ASN and have the ability to multi-select containers for bulk processing.

Container Lookup

The container lookup dialogue is updated to allow the user to look up any inbound or outbound container by container ID, ASN, item, UIN, or type of container.

Notes Tracking

The notes dialog, same as that added in customer orders, is added to the shipping and receiving dialogues. This allows easy sharing of information between users processing containers.

A single notes field allows a user to share information on the shipment across containers or shipment header level.

For more information, see the *Oracle Retail Store Inventory Management User Guide*.

Corporate Efficiency

Several new services are added. These services enable retailers to execute Oracle Retail Store Inventory Management business functionality within their own systems.

The following new services are available in release 15.0:

- Product Group and Product Group Schedule

  Lookup, read, and update.

- Shipment Reason code

  This service allows the user to look up reason codes that are used in the RTV and transfer shipment dialogue to ship with.

- Store

  The service allows the look up of auto-receive stores, buddy stores, stores in a transfer zone, and read the detail of the store.

- Stock Counts

The stock count service allows the user to look up header information, ready stock count details, and the details of child stock counts.

- Item Request

  This service allows the user to read time-slot information and look up the header and details.

- Vendor Return document

  Vendor Returns can be looked up, read, updated, approved, and cancelled.

Usability and Performance Improvements

Batch processing between Oracle Retail Price Management (RPM) and SIM is improved by allowing the batch file to be split and processed by location.

The introduction of the container support feature involved refactoring of several shipping and receiving dialogues. This results in an efficient alignment of the workflow in shipping and receiving.

Integration Enhancements

The integration enhancement described below is included in this release.

Xstore Integration

When deployed with SIM, Xstore integrates with SIM through SOAP web services. Xstore uses the following web services for inventory inquiry:

- StoreInventory
- StoreInventoryUIN

Xstore also updates Stock on Hand (SOH) in SIM by calling the following web service for Sale, Return, Void, and Layaway transactions:

- ProcessPOSTransactions

For more information, see the *Oracle Retail Store Inventory Management Implementation Guide, Volume 2 - Integration with Oracle Retail Applications*.

Technical Enhancements

The technical enhancements described below are included in this release.

Hardening of Security

SIM specific TABLESPACES were added. Tables that could hold potentially personally identifiable information (PII) have been moved to encrypted table spaces using Oracle's Transparent Data Encryption (TDE). SIM also introduced new database roles with restricted database privileges.

New Application Security groups have been introduced for controlling user authorization. The groups are (secure-users, admin, batch, integration, security, server, mps).

Software Operating Environment Upgrades

This section addresses the technical enhancements for the software operating environment included in Oracle Retail Store Inventory Management 15.0.

> **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 following technology is upgraded:

- Oracle Database Enterprise Edition 12cR1 (12.1.x)
- Oracle WebLogic Application Server (12.1.x)
- Oracle Linux 7 for x86-64
- Red Hat Enterprise Linux 7
- Java 1.7.0_85 (security baseline)
- Java JRE 1.7 for the client browser
- Java JRE 1.8 for the client browser

Related Documentation

For more information, see the following documents in the Oracle Retail Store Inventory Management Release 15.0 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 Implementation Guide, Volume 5 - Tablet*
- *Oracle Retail Store Inventory Management Data Model*
- *Oracle Retail Store Inventory Management Upgrade Guide*

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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