

Overview

Oracle Retail XBRⁱ Release 15.0 offers Business Intelligence (BI) reporting and analysis modules in the areas of Loss Prevention (LP) and Sales and Productivity (SP).

The XBRⁱ LP module is the world's most widely used loss prevention and point of service (POS) data analysis tool. The LP module is an intuitive, intelligent and global analytical reporting solution that is designed to quickly identify suspicious trends, transactions, and other data anomalies. The LP module allows easy user access, dynamic functionality, and forensic analysis to make more-informed decisions with timely, data-driven answers to business questions and to protect the bottom line.

The XBRⁱ SP module offers robust and highly configurable reporting across all levels of the retail organization hierarchy (Salesperson, Store, District, Region, and so on), merchandise hierarchy (item, class, dept., and so on) and/or by geographic attributes. Through a comprehensive set of grid and graph reports, documents and interactive dashboards, users can compare same store sales to past performance and custom goals, measure sales members' productivity, and evaluate the impact of merchandise characteristics on productivity.

Retailers can purchase the Loss Prevention module separately, or have both modules bundled in the application.

Oracle Retail Cloud Services

Oracle Retail XBRⁱ Cloud Services are hosted in the Oracle Retail Cloud with the security features inherent to Oracle and a robust data center classification, providing significant uptime. The Oracle Cloud team is responsible for installing, monitoring, patching, and upgrading retail software. Included in the service are continuous technical support, access to software feature enhancements, hardware upgrades, and disaster recovery. The Cloud Service model helps to free customer IT resources from the need to perform these tasks, giving retailers greater business agility to respond to changing technologies and to perform more value-added tasks focused on business processes and innovation. Oracle Retail Software Cloud Service is acquired exclusively through a subscription service (SaaS) model. This shifts funding from a capital investment in software to an operational expense. Subscription-based pricing for retail applications offers flexibility and cost effectiveness.

Supported Client Browsers and Mobile Devices

The XBRⁱ 15.0 release is supported on the following browsers and mobile devices:

Browsers	Comments
Internet Explorer 11	Compatibility view is not supported
Safari (iPad)	Basic analyst functionality supported on iPad browser
Firefox	Version 36.0
Google Chrome	Version 49.0
Mobile Devices (Oracle XBRi)	Comments
Apple iPad	iOS8, iOS9

Functional Enhancements

The following are functional enhancements for XBRⁱ Release 15.0.

Sales and Productivity Module

This release introduces the SP module, which is divided into the four business areas summarized below. Detailed information on the new SP Administration Project Default pages and Dashboards follows the summaries.

Comparative Sales

Comparative Store Sales gives retailers a new dashboard and a comprehensive set of reports. The purpose is to report on sales by store by day. These sales include This Year vs. Last Year (TY/LY) transformation metrics, based on retailers' predefined fiscal calendars. A second set of transformation metrics tracks comparative (Comp), or same store sales. These metrics add further logic to the TY/LY comparison, by comparing store sales only to when the store was open at the same time this year and last; with additional business logic. The Comp settings are maintained within the application using a new Store Status page in Administration, Project Defaults. In addition, the customer can define and load sales goals or budgets to compare a store's sales performance to as many as three different sales goals. This is accomplished within the application, using a new Upload Goals/Sales page in Administration, Project Defaults.

Salesperson/Employee Productivity

Salesperson Productivity reporting tracks key sales and productivity KPIs. These KPIs are attuned to a true selling environment in which employees are held accountable for sales and the quality and focus of what they sell. Another component of salesperson productivity is measuring sales against hours worked. Hours worked can be classified as selling or non-selling hours. These metrics are used to create and monitor sales/labor hour comparatives. A comprehensive set of new reports is provided in the Productivity category, as well as a new Salesperson Productivity dashboard. Using the new Salesperson Custom Stats page in Project Defaults, Administrator users can define up to ten custom KPIs with count, transaction count, and amount statistics in each KPI to use in reporting.

Merchandise Productivity

Merchandise Productivity provides retailers with sales analysis across their merchandising hierarchy. A merchandise (SKU Master) table has been incorporated, which provides the levels of summarization needed within these hierarchies along with added attributes associated with the item such as vendor or manufacturer. This allows retailers to analyze their merchandise sales by categories and by items across their merchandise and operational hierarchies. It also allows for Margin analysis as well as, Return, Discount, and Voids summary information through these same hierarchies. New reports are provided in the Merchandise category along with a new Merchandise Productivity dashboard.

Store Sales Flow by Period

The Store Flow by Period components of this module provide customers with added business analytics focusing on the flow of sales transactions throughout business days, by hour, or by day-part custom categorizations, for example, Morning, Lunch, Afternoon, Early Evening, Evening, as well as by traffic counts and conversion rates. A new report, Sales Flow by Period Summary, gives the user the flexibility of accessing information in multiple ways. There is a new dashboard, Sales Flow by Period. The new Sales Flow by Period reporting by store type category is also available.

LP and SP Module Delivery

With the introduction of the SP module, XBRⁱ can now be purchased with just the Loss Prevention module, or Loss Prevention and Sales and Productivity can be purchased together. Retailers who purchase both modules can access both within the same application, and apply access to one or both modules at the User and Group Levels.

New Administration Screens – Project Defaults

Upload Goals/Sales

The Upload Goals/Sales page provides a mechanism for retailers to upload sales goals or historical sales to be used in Sales and Productivity reporting at the store level. The data can be uploaded from text, csv, or Excel files that are formatted for the expected table layout. Retailers can use the uploaded data to compare store sales performance to different goal(s) and this year to last year.

Salesperson Custom Stats

The Salesperson Custom Stats page lets retailers define the KPI target categories focused on increased sales and incentive tracking for use in evaluating salesperson productivity. Retailers can create up to ten target categories with count, transaction count, and amount statistics. For example, a target category might summarize the number of warranty or service plans that are sold by retailers when they purchase appliances. Another target category might track the sales of gift cards by salesperson during a pre-holiday sales period.

Store Status

The Store Status page lets retailers identify the status of stores as Comparative or Not Comparative, or Polled or Not Polled for specified date ranges for analysis of comparable stores. Polled Status is used to determine if an estimation, or flash sales, is to be used until the data expected during specific time ranges for a store can be updated. This is to make in-store comparisons more relevant in Sales and Productivity reporting.

Metric Bulk Update

The Metric Bulk Update page lets retailers set defaults for local, common, or all currency metrics. This includes defaults for symbol, custom mask, position, negative numbers, and decimal place.

Case Management

The Case Management page lets retailers modify these default project settings for the Case Management feature: Application URL, Web Services URL, User Account, and User Password used for communication between the two applications.

Admin Control

The Admin Control page lets retailers enable or disable Oracle users. The users in this list are the Oracle administrators with elevated privileges who may need to perform configurations of the application.

Sales and Productivity Dashboards

The Sales and Productivity module introduces four new core dashboards. They can be customized to retailers' requirements, or additional dashboards can be created with the involvement of the Oracle Services team.

Comparative Store Sales – This dashboard visualizes sales by region, district, or store, comparing this year to last year and to sales goals. It tracks sales amount, transaction count, units sold, and margin percent over a selected time period.

Merchandise Productivity – This dashboard visualizes how profitable merchandise is by department, class and style, at the region, district, or store level. Performance is ranked from top to bottom and compared for net sales, net unit count, net margin percent, and this year to last year.

Sales Flow by Period - This dashboard visualizes sales throughout the day for all or specific days of the week. Sales flow can be shown daily, hourly, or by day part (for example, morning, lunch, afternoon, evening) at the region, district, store, or store type level. Sales are summarized by amount, transaction count, unit count, amount per transaction, and units per transaction.

Salesperson Productivity – This dashboard visualizes salesperson productivity using several different metrics, including transaction count, unit count, units per transaction, amount per transaction, and average unit amount. Results can be viewed at the region, district, store, and individual salesperson level over a number of time periods.

New Survey Analysis Dashboard

This new dashboard is provided on the XBRⁱ web application for modelling and analyzing the results of the mobile app Survey feature. You can select store hierarchy, auditor, and date range to summarize the survey results based on those selections, and also sort by top and bottom results.

Modified KPI Dashboard

The look and feel of the KPI dashboard has been improved based on customer feedback to better support customers' needs. The previously used KPIs have been replaced with those most frequently requested. The four dashboard panels have been reconfigured into

three panels that are stacked to provide numerous combinations of results from yesterday, last week, and the last 30, 60, or 90 days.

Sales and Productivity Reports

The following are the new core folders of reports (and report count) in the SP module. Retailers can configure these reports to their company's requirements, and also create new reports using SP data with the XBRⁱ Report Wizards.

Comparative Sales

- Sales Comp Productivity Summary
- Sales Comp Productivity Summary (Calendar TY vs. LY)
- Sales Comp Productivity Summary (Fiscal TY vs. LY)
- Sales Comp Productivity Summary (Goals)
- Total vs. Comp Sales Summary

Master Tables

- Cashier Master
- Customer Master
- District Master
- Region Master
- Register Master
- Sales Goal Master
- Salesperson Master
- SKU Master
- Store Master

Merchandise

- Market Basket Disc Sales Summary
- Market Basket Merch Sales Summary
- Merchandise Sales Summary
- Merchandise Sales Summary - Daily
- Merchandise Sales Summary - Vendor
- Merchandise Sales Summary - Weekly
- Merch Sales Summary (Calendar TY vs. LY)
- Merch Sales Summary (Fiscal TY vs. LY)

Productivity

- Daily Hours Worked Summary
- Daily Salesperson Summary
- Daily Sales Summary
- Hours Worked Summary
- Merch and Non-Merch Sales Summary
- Sales Productivity Summary
- Sales Productivity Summary (Calendar TY vs. LY)

Sales Productivity Summary (Fiscal TY vs. LY)
Sales Productivity Summary (Goals)
Sales Productivity Summary (Hrs Worked)

Sales Flow by Period

Sales Flow by Period Summary

Tech Support

Daily Comp-Poll Summary
No Poll Stores Summary
Stores Comp Polled Status
Stores Not Processed
Stores Processed
Stores Processed Details
Trans Count Summary

Transaction Analysis

Clock In and Out - HDR
Gift Card Certificate Summary
Hours Worked by Business Date
Incomplete Transactions
SKU Details
Tender Details
Tender Summary
Transaction Details
Transaction Header
Transaction Journal

Survey Modifications

The survey on the Oracle XBRⁱ mobile app has been enhanced to include a New Survey button, so that users no longer have to click on the map to start a new survey. Another new option lets you start a new survey from the historical survey results page. You can then select the store from a drop-down list and create a new survey.

New Oracle Retail Cloud Documentation Videos

Oracle is providing new informational videos that guide users through common tasks in XBRⁱ.

- The Navigation Basics video demonstrates basic navigation within the XBRⁱ application, such as how to log in and navigate through the different screens using the navigation toolbars and menu bars. It also covers report action links and other navigation options such as search, search filters, and XBRⁱ online help.

Available to customers in the documentation library at:

<https://youtu.be/-l-ymhoRy5o>

- The User Management Video shows how Customer Administrators can set up new users and groups, focusing on their access to data, features, and modules, and set up a security filter.

Available to customers in the documentation library at:

<https://youtu.be/OZwAnYtivaE>

Technical Enhancements

Real Time Processing

XBRⁱ 15.0 provides real-time processing to support intraday flash sales reporting for the new Sales and Productivity module. This is accomplished by processing data in specified time increments throughout the day rather than once at the end of day. Additional business logic supports the inclusion of post voids, clock in, clock out, and adjustments to normal business. Additional Loss Prevention analysis followed by no sale and no match transactions will be updated through the end of day process.

New Inventory Results for Full or Cycle Counts Table

This table stores data for inventory results for both full inventories and simple cycle counts with key information to the item level. The data will support the Loss Prevention team with analysis of inventory shortage, linking to merchandise activity, to look for POS activity such as returns or voids that may have been the cause of the loss. The new data feed will be required to be formatted to a standard file layout or additional services will be required to load the data.

New Custom Fields Added to the Employee Master and SKU Master

New custom fields are provided to allow customers to configure and extend the data collected in these tables. These new fields support both the Loss Prevention and Sales and Productivity modules.

Known Issues/Defects

The noteworthy issues and defects described below exist in this release.

Known Issue/Defect	Defect Number (Bug DB)
The questions in the Mobile Survey History list are not translated for Spanish and Portuguese.	23072051
The PDF file in email attachments or in the exception dashboard does not display correctly for control points and control groups.	23072110
When using a Custom Group, the items in a list will not display.	23072168
If you try to upload a video from Video Queue, the video will not be saved	23072179
The Data Editor list of available tables that can be administered is limited to 10.	23197503
You may need to install Flash Player version 22,0,0,209 to run the Survey Analysis dashboard. Note: You need to restart your computer once Flash Player is installed.	24369214
When editing data in the Data Editor, if the table name description contains spaces, the page after editing the data appears empty. Workaround: Replace spaces in the table name descriptions with underscores. This ensures that the page after editing the data will be displayed properly	24408102

Related Documentation

For more information, see the following documents in the Oracle Retail XBRⁱ Cloud Services 15.0 documentation set:

- *Oracle Retail XBRⁱ Cloud Services Implementation Guide*
- *Oracle Retail XBRⁱ Cloud Services Administration Guide*
- *Oracle Retail XBRⁱ Cloud Services Web User Guide*
- *Oracle Retail XBRⁱ Cloud Services Administrator User Guide*

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<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

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Value-Added Reseller (VAR) Language

Oracle Retail VAR Applications

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