Oracle® Retail Merchandising Foundation Cloud Service (RMS)

Release Notes

Release 16.0

E85799-02

May 2017

This document introduces Oracle Retail Merchandising Foundation Cloud Service 16.0.

Overview

Retailers leverage Oracle Retail Merchandising Foundation Cloud Service functionality to execute core merchandising activities, including merchandise management, inventory replenishment, purchasing, import processes, sales auditing, and financial tracking. Its Trade Management module 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.

Merchandising Foundation Cloud Service also includes a Sales Audit module that evaluates all sales transaction from all channels, ensuring clean and consistent sales information. The solution identifies any missing, duplicate or erroneous data, highlights any suspicious transactions and ensures errors are resolved so that downstream systems operate off the same cleansed sales information.

> **Note:** The Merchandising Cloud Services are based on corresponding on-premises applications. References to the on-premises application names exist throughout the Merchandise Cloud Services applications and documents.

Oracle Retail Cloud Services and Business Agility

Oracle Retail Merchandising Foundation Cloud Service is hosted in the Oracle Cloud with the security features inherent to Oracle technology 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 is 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.

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Client System Requirements

The following technology is supported:

- Operating Systems
    - Microsoft Windows 7
    - Microsoft Windows 10
- Browser Support
    - Mozilla Firefox ESR 45
    - Internet Explorer 11.0
    - Google Chrome (Desktop) 48+

> **Note:** Oracle Retail assumes that the retailer has ensured its Operating System has been patched with all applicable Windows updates.

Functional Enhancements

The following were functional enhancements for the on-premises Release 16.0 of Oracle Retail Merchandising, Oracle Retail Trade Management, and Oracle Retail Sales Audit. They are provided here for reference purposes.

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 User 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 Invoice Matching, Oracle Retail Allocation, Oracle Retail Sales Audit, and Oracle Retail Merchandising System User* guides.

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.

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 functionally 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.

Area	Notes
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.
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*.

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.

Mass Audit Error Resolution

Sales Audit automatically identifies sales and returns transaction conditions and errors to ensure that retailers can make necessary corrections before final financial recording and passing on to other systems. Working with large sales volumes, a retailer may find multiple occurrences of the same error, such as a data issue related to an improper promotion ID. With Release 16.0, users in Sales Audit now have the ability to resolve multiple instances of the same error across an entire store day, or even across stores for a day, in a single action allowing users to focus more of their time on unique and critical issues.

Other 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 not use 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 were technical enhancements for the on-premises Release 16.0 of Oracle Retail Merchandising, Oracle Retail Trade Management, and Oracle Retail Sales Audit. They are provided here for reference purposes.

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*.

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 were integration enhancements for the on-premises Release 16.0 of Oracle Retail Merchandising, Oracle Retail Trade Management, and Oracle Retail Sales Audit. They are provided here for reference purposes.

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.

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.

Financials Integration

A new process for extracting staged financial data to a flat file has been included in this release. This is intended for interfacing financial data from the Merchandising Foundation Cloud Service to a General Ledger system.

Support Considerations

For product support and logged defects, the new product identifier for Oracle Retail Merchandising Foundation Cloud Service is 13315. Each logged defect will be analyzed to determine the source of the reported issue. Note that this Cloud Service product code also includes trade management and sales audit functionality.

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
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
Issue with creating items with multi-level items, such as an item parent and its transaction items, in the same file in the same spreadsheet using item upload from spreadsheet functionality. An error is raised which prevents the items from being created. The workaround is to create the parent items first and then the child items.	24918562

Related Documentation

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

- *Oracle Retail Merchandising System User Guide and Online Help*

- *Oracle Retail Merchandising System Reports User Guide*

- *Oracle Retail Sales Audit User Guide and Online Help*

- *Oracle Retail Merchandising System Custom Flex Attribute Solution Implementation Guide*

- *Oracle Retail Merchandising Cloud Services Implementation Guide*

- *Oracle Retail Merchandising Cloud Services Administration Guide*

- *Oracle Retail Merchandising Cloud Services Administrator Action List*

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