

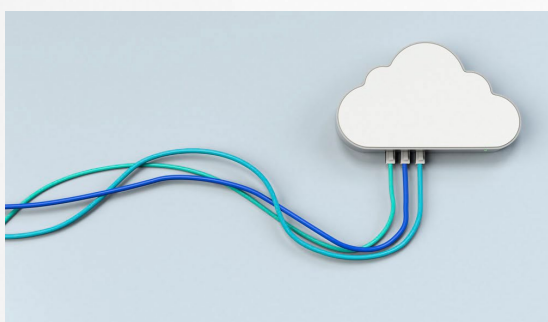
# Key mistakes customers make moving to OTM Cloud from On Premise that could be avoided with a Health Check

Every company has a mandate to cut costs and improve productivity, and one of the best ways to do that is by getting rid of that huge data center and moving to OTM Cloud. So, you start on your journey, and you decide to either do it yourself or get a Systems Integrator to support you. You're then presented with these options should I do a Lift and Shift, or should I do a new implementation? Again, because you're trying to save money many think, my OTM environment is working well On Premise so why not just pick it up and move it to the cloud? Please allow me to tell you why this may not be the best option and the things that you need to consider.

Winfree Consulting recently completed a Comprehensive Functional and Technical OTM health check for a customer that had migrated from On Premise to OTM cloud. They did use a Systems Integrator and they've been up and running for quite some time, but they began to experience performance issues. The users were complaining about how slow the system was running, one user said, "I can click the button, go get coffee, come back and still wait for the successful message". They were having to log an Oracle SR several times a week because the system was just moving so slow. Oracle could not fully help them and recommended they get an independent assessment because the issue was not their cloud environment, the issue was their configuration. But what's wrong, this is the same configuration they used On Premise, and they didn't have these problems, so why is it a problem now? Here are just a few reasons why:

**Event Queue and Cache Sizing** - When moving to OTM Cloud you still need to monitor the sizing of your event queues and cache. In the case of this customer, we saw some of the event queues were far too small to accommodate the peak volumes of the events that they support. This caused significant delays in processing those events and some of the caches were sized too small to accommodate the volumes they support. This causes them to swap more often than necessary, thereby degrading system performance. It's imperative to do an assessment of your transactional volumes to determine the appropriate sizing for your event queues and cache.

**Ignoring current processes and how they could change** - When migrating to the cloud, many will say just keep everything the way it is, and you can change it later. While it is true that you could change it later, you could also be overlooking some opportunity to simplify processes or configuration with your move. There is value in doing an end-to-end business process review to determine if perhaps there are any opportunities to do something better in OTM Cloud. Once you've done the assessment, then you can plan the roadmap which would include things you want to change right away with the migration, and things you want to change but want to wait until after the migration to complete. Every business is different, it is not a one size fits all answer, which is why doing a comprehensive health check assessment of your current environment and processes first, will allow you to find the right balance of changes to make right away versus changes to plan for in the future.



**New functionality in cloud that was not available on premise** - but that's a good thing, right? Yes, it is, but only if you take advantage of it. Finding the right balance of what to take advantage of out the gate is one of the keys to success. There are many things that Oracle has done in OTM Cloud that were not available On Premise. For example, from an Automation Agents perspective to accommodate for the inability or need to do stored procedures in agents; there are new agent actions, data associations, and performance monitoring abilities that you should take advantage of. When moving to the cloud, you want to evaluate all agents, determine their purpose, and determine are they configured in the most optimal way to perform in OTM Cloud. With this client we saw many issues surrounding agents like multiple agents performing the same actions with overlapping or conflicting conditions, agents with direct sql statements for things that Oracle has now included specific actions for, poorly structured direct sql statements.

Automations agents are like the heartbeat of any OTM environment, they have the power to make your business run extraordinarily great or if poorly configured they can severely impact your entire operation. In this customer's environment, while agent development was a major concern from a performance/technical aspect, it also had functional implications as well. When users were performing actions, they are often waiting for the actions to occur, and they were sometimes getting errors that the action did not occur even though it did. Automation Agents should be carefully assessed prior to moving to OTM Cloud.

Another great feature Oracle added to OTM Cloud is the ability to use many Rest-API based Services rather than old fashioned Web Services that only use XML. This improvement opens countless possibilities for integration and should be considered when moving to OTM Cloud.

**Not using the Oracle Provided Performance Monitoring tools** - Run the AWR report and the Data Analyzer tools that Oracle provides on a regular basis. These tools are key to helping you identify system or performance issues before they become a major problem.

**Missing Data in OTM that agents are relying on** - We often see migration mistakes where an agent is inserting a specific value into a record or setting a specific status, but the data was not migrated from the On Premise environment so the agents are failing. It's imperative when you configure your new OTM Cloud environment to test full cycles of all processes preferably at volume and monitor the agent errors that are occurring. You will be able to discover many data migration issues through this process.

**Migrating old data and configuration** - one of the greatest benefits of moving to OTM Cloud from On Premise is that you're essentially starting over. Take advantage of it. Some customers have the mindset of well let's just move everything. Yes, it may take a little extra time and patience but trust me, take the time to clean up and get rid of the old data like old locations, old rates, inactive itineraries, the list goes on. You would be amazed at how much more proficient your environment can run and your users can process not having to deal with old garbage data. Don't forget, Garbage in - Garbage Out!

**Not considering the user experience** - Your users experience is key to a successful implementation and improvement in productivity. One of the best things Oracle has improved upon in OTM Cloud is the Enhanced Workbenches. If you've only worked on premise and you just had advanced layouts, business monitors, or legacy workbenches, you're probably thinking about the headache of creating queries and how slow and poor those were, trust me this is not that. Enhanced Workbenches are powerful tools that allow you to pull many screens into one screen so that users don't have to constantly click on multiple screens or smart link from one object to another. Enhanced Workbenches have the same capabilities as screensets but in a more powerful way. They've even added the ability to include analytics in a workbench to help users make decisions operationally, they've also multiplied the number of tables and objects available. When you're migrating to OTM Cloud take the time to evaluate your users' processes and think about implementing Enhanced Workbenches that could help improve their productivity and their experience.

While the items mentioned in this article are not an exhaustive list of all the mistakes made by companies moving to cloud, or of all the great new functionality Oracle has included in OTM cloud; our hope is that you see the need for due diligence to be done up-front so that you can avoid frustration, wasted efforts, and dollars by doing it right the first time. If you are considering moving to the cloud and want to avoid these mistakes, Winfree Consulting can help you with a Cloud migration Assessment or if you have already moved to OTM Cloud or are still On Premise and you're experiencing performance, productivity, or user experience issues, Winfree Consulting can help you with an OTM Comprehensive Health Check.

## OTM Comprehensive Health Check

### Technical Check Up

- Technical Analysis and Performance Assessment
- Workflow Agent Efficiency Analysis
- Property Settings – Queue Sizing
- Integration Review

### Functional Check Up

- User Experience Assessment
- Business Process and Configuration Review
- Identification of beneficial functionality improvements

## Cloud Migration Assessment

Configuration and Customization Analysis

Data Migration Strategy

Integration Strategy

Business Process and Transformation Opportunities

The comprehensive health check includes complete documentation of findings, short term and long-term recommendations, and a roadmap to help you plan for improvements to improve performance, stability, and user productivity.

Our approach to the health check and assessments includes interactive sessions with users to discuss their current processes, pain points, and future operational plans. We also do an extensive review of your OTM environment configuration from both a functional and technical perspective including your OTM Analyzer Report, configuration, customizations, and integrations.

The outcome of this assessment is a complete report of our findings and recommendations. Each finding includes a detailed description of the finding and 1 or more recommendations to address the findings if required. Each recommendation includes a rating that helps you to gauge the Effort vs Benefit that you will receive to help you plan the sequence of items. Below is an example of an actual Health Check report table of contents.

Our consultants have been implementing OTM for more than 15-20 years and have experience in every industry. The benefit of experienced resources when doing a Health Check or Cloud Migration is that we've seen the different ways that customers operate and know the best practices, we know the common mistakes that are made during implementations and what to look for. We're not just considering the technical aspect, but we also consider your business processes, current and future operational goals, and users experience.

Contact us today to schedule your OTM Health Check or Cloud Migration Assessment – [info@winfreeconsulting.com](mailto:info@winfreeconsulting.com)

### Example of Health Check Report Table of Contents

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Terrell has been implementing the Oracle Transportation Management (OTM) application since 1999 (23 Years).

She spent 17 years with a major third-party logistics (3PL) provider where she successfully completed more than 80 implementations with budgets of **50K-7M** in North America, Latin America, and Europe for customers in all industries including 3PL, Consumer and Retail, Life Sciences, Chemical Industrial, Oil and Energy, Technology, and Automotive.

Terrell started her consulting career in 2014 as a Managing Consultant at DXC Technology, formerly CSC for 6 years. At DXC Terrell led the OTM Practice made up of functional, technical, integration, support, and DBA resources both onshore and offshore. Terrell's team successfully completed several multi-year implementations ranging in deal sizes **15K-10M** and developed innovative integrated solutions and accelerators for OTM.

Terrell is known for the development and implementation of innovative, efficient, quality solutions for business-critical customer processes as well as developing quality OTM implementors, super users, and end users. Terrell founded Winfree Consulting in February 2021 which is a conglomerate of Independent OTM consultants that have been implementing OTM longer than 15-20 years and come together to provide affordable, quality, efficient solutions.



*Winfree Consulting*

Winfree Consulting™ LLC is committed to providing experienced, quality, functional and technical resources that will not just complete an implementation but will ensure that the most effective, efficient, and user-friendly solutions will be deployed on time and on budget.

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