



5 Key Aspects of OTM Platform

2023 Update



by Tony Wayda



5 Key Aspects of OTM Platform Reviewed

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The 2023 Oracle Transportation and Global Trade Management Special Interest Group (OTM-SIG) 3-day event once again lived up to expectations, drawing an engaged crowd as it does year after year. What makes this user group unique is the OTM clients/users sharing their stories during the breakout session presentations, along with their willingness to openly discuss both challenges and successes.

In JBF's Strategy Practice, we have a concentrated focus on evaluating and advocating for optimal TMS solutions for our clients. This lens leads us to delve into the product strategy roadmap and assess how well Oracle fulfilled its commitments from the previous year.

We find it impressive that 35 of the last 70 enhancements in the latest release came from customer suggestions. It's refreshing to see that Oracle takes customer input seriously. Here are the 5 most interesting roadmap items and JBF's perspective on their usefulness for a transportation operation based on our JBF Sentiment Rating™ with 5 being the best.



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Area 1

ARTIFICIAL INTELLIGENCE (AI) & MACHINE LEARNING (ML)



JBF SENTIMENT RATING™

Strategic Value | 4 out of 5

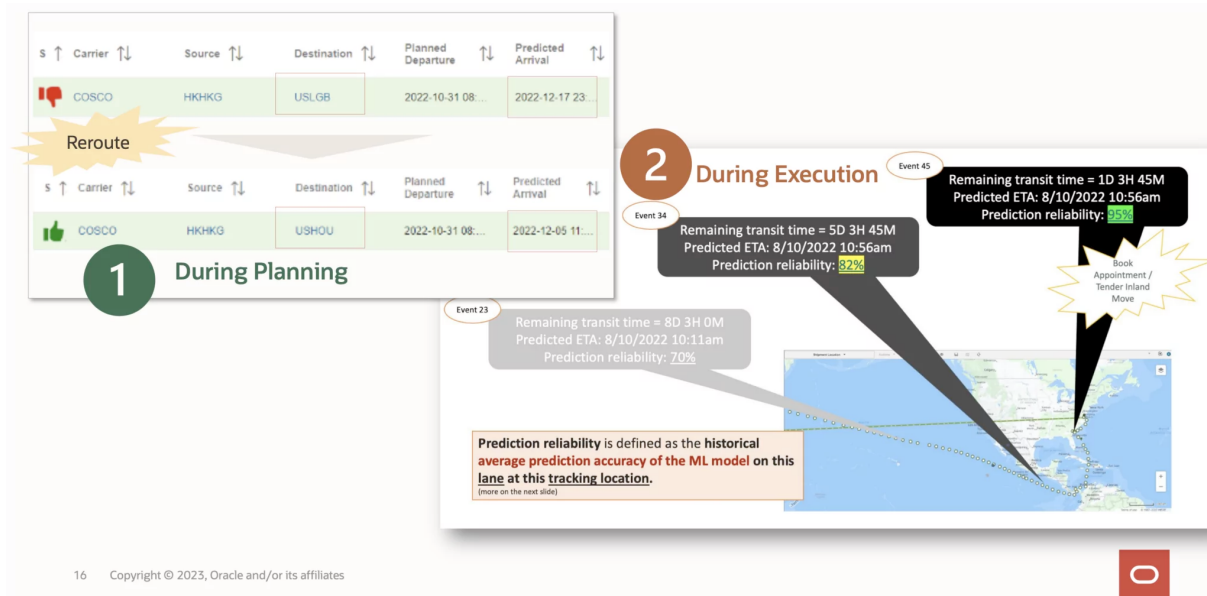
Oracle continues to invest in disruptive technology. We were particularly focused on AI and ML-based decision-making and use during optimization.

Last year **JBF scored Oracle a 3 out of 5 in this area on the JBF sentiment rating**. While we would always like more, we are seeing AI & ML beginning to be utilized in key OTM functions. Predictive ETA can now be utilized during OTM's planning and execution. Users will also be able to configure a machine learning model (no code, no scientist needed) that will self-improve based on historical and recent data.

The actionable machine learning predictions aid in the decision-making during planning based on history in the lane (carrier, origin/destination, date/season, etc.). During execution, the model will show a prediction reliability. This is based on the historical average prediction accuracy of the ML model on that lane at the tracking location.

Naturally the closer the tracking event locations get to the final destination the higher the prediction accuracy. While this last piece is an addition to the strategy roadmap shown last year, it still leaves much to be desired.

Actionable Machine Learning Prediction Output

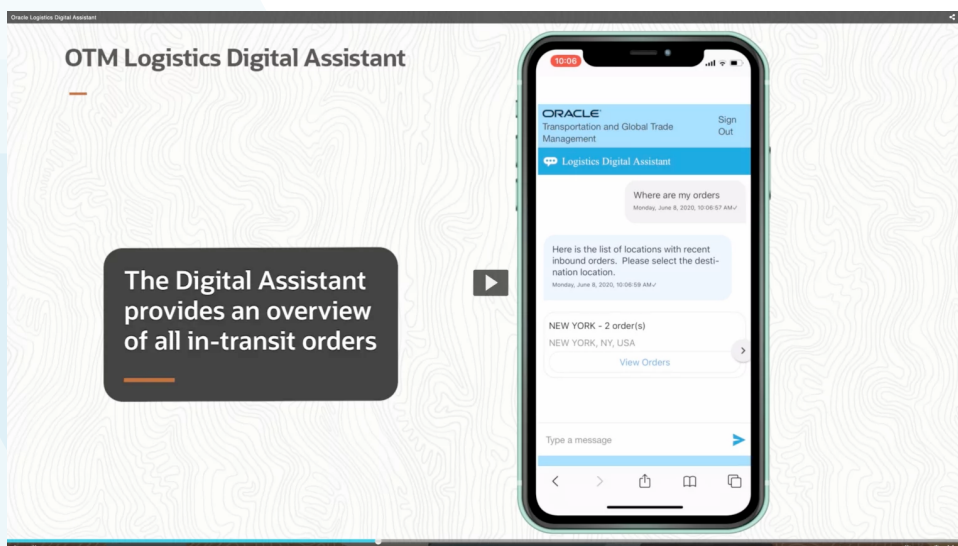


Source: Oracle Product Strategy Presentation; © 2023 Oracle and/or its affiliates

The Oracle Digital Assistant (ODA) for logistics is one of the most practical uses of AI/ML that every OTM shop should be utilizing. Simple voice or text commands can retrieve order or shipment status and the ODA platform is extensible utilizing REST APIs to access all business objects (invoices, orders, shipments, etc.).

Oracle Logistics Digital Assistant demo

View the [Oracle Logistics Digital Assistant demo here](#).



Additional areas Oracle is applying AI/ML:

- **Order Routing and Order Consolidation** - Determines the desirability of orders consolidating in same shipment; ensures orders follow user-preferred route.
- **Data Anomaly/Outlier Detection** - Analyze data as received or entered by a user: screen for anomalies & potential errors in real-time. For example, an invoice from a particular carrier in a lane is typically \$1400 and the system receives an invoice from the carrier for \$14,000. Instead of sending this through the entire process to be rejected, the system can flag this upfront so it can be addressed immediately.
- **Document Extraction** - Convert documents into data for ingestion and avoid effort & errors from manual entry. While OCR has been around for a while Oracle is adding an additional layer of intelligence to recognize and capture key data elements.
- **Product Classification** - Reduce user effort & errors in identifying the correct classification codes (e.g., HS codes).

We are excited by the announcement of Oracle's partnership with **Cohere**, a leading generative AI company. Our hope is this will speed up the rate of meaningful AI in OTM.



"The days of digital brokers and Spot being a "Hail Mary" last resort are gone."



Area 2

OPTIMIZING CARRIER COSTS – DIGITAL BROKER INTEGRATION



JBF SENTIMENT RATING™

Strategic Value | 5 out of 5

As promised at [last year's SIC](#), Oracle delivered on the integration of digital freight brokers during both planning and execution in their last release which include [Uber Freight](#), [Convoy](#), [Surge Transportation](#), and [LoadSmart](#).

Given the gap between spot and contract rate in the last year this capability will enable shippers to drive even more savings if they choose to use this feature proactively. The days of digital brokers and spot being a “Hail Mary” last resort are gone. Combining the use of digital brokers, spot market, and OTM’s step tendering enables shippers to deploy an array of strategies to ensure they get the best rate for their freight while still managing their carrier capacity commitments.

The flexibility to include digital brokers during planning or execution will be key for many shippers, especially if they have a large number of orders to plan. It is important to understand that utilizing this feature during planning will increase the optimization time due to the API calls to the digital brokers.

Other improvements include:

- › Service provider tender constraints for equipment and special services
- › Reason code capture if the lowest spot is not chosen
- › Ability for spot carriers to enter per mile rate rather than just a fixed rate
- › Capture additional reference data from spot carriers during the bid process



Area 3

AREA 3 - UX & WORKBENCH ENHANCEMENTS



JBF SENTIMENT RATING™

Strategic Value | 5 out of 5

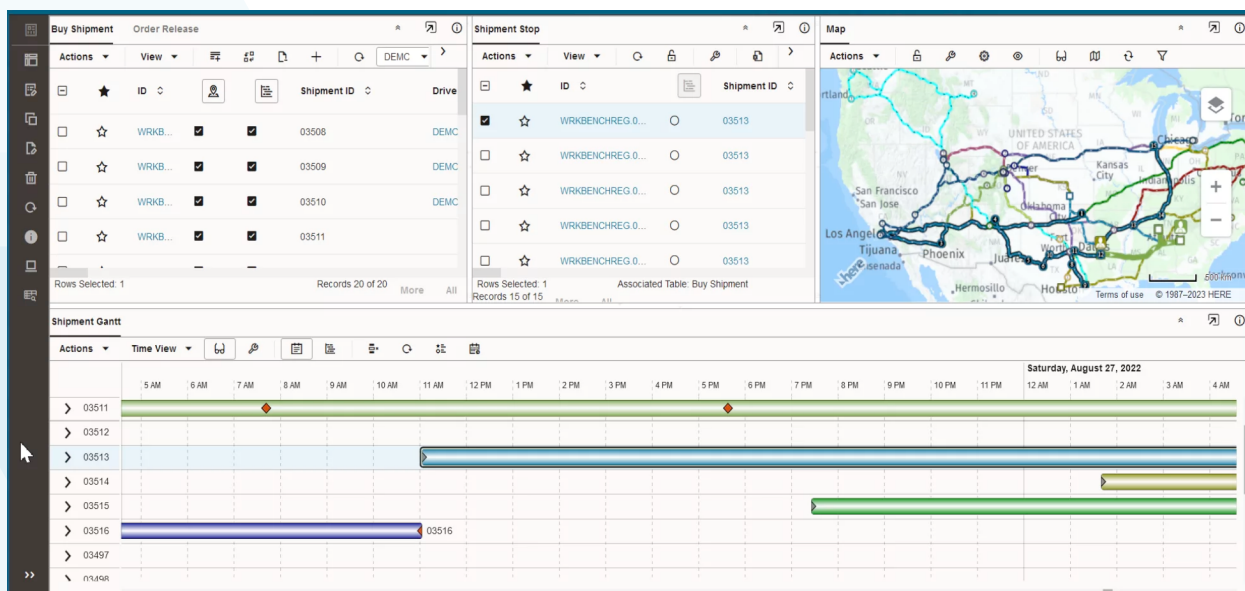
One of the most impressive items was the UX and Workbench enhancements. There have been UX and Workbench enhancements in the last 3 releases. The incredible amount of flexibility and personalization includes:

Ability to create advanced Workbench layout

- Layout Display - Compact, Super Compact
- Inline edit and mass update with action checks
- Configure windows (lists, charts, maps, graphs) and size each individually
- Drag and drop, multi-select, filtered Set for Action Selection

The possibilities are endless and once you create your custom Workbench for the various tasks, you just save them as favorites.

Next Generation Workbench



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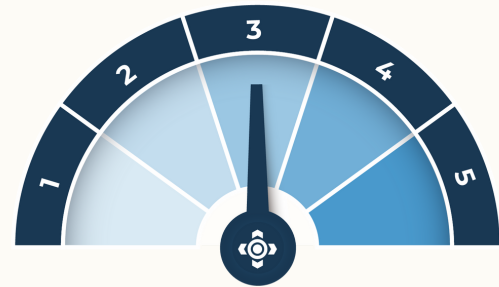
The Data Visualization capabilities allow users to quickly create meaningful visuals that simplify identification of items that need attention or are outliers. Coming soon these additional features will be available in the Workbench.

- » Embed third-party apps
- » Additional Personalization
- » Lasso-and-select on Map
- » Multi-parent Detail pane
- » Redwood "Ask Oracle" uptake
- » New Public Layouts + more content added to existing layouts
- » New drag/drop actions (Power Unit→Buy Shipment)
- » Map actual route based on events



Area 4

DOCK SCHEDULING



JBF SENTIMENT RATING™

Strategic Value | 3 out of 5

While Oracle has made some improvements to its dock scheduling module, we would like to see more intelligence built in to suggest appointment times based on estimated delivery/pickup times. In fairness to Oracle, they are beginning to close the gap compared to the most robust appointment scheduling applications available.

In recent releases they have added:

- › Improved Gantt appointment view
- › Multiple appointment support (for multiple commodities, dry door, refer door, etc.)
- › Flexibility to set appointment at any specific time – not just on the quarter or half hour
- › Appointment scheduling cut-off times – carrier must schedule appointment X number of days or hours before delivery day
- › Includes drag-and-drop features in the appointment scheduling UI

We are also encouraged by Oracle's participation in the [Scheduling Standards Consortium \(SSC\)](#). This initiative is in its infancy but is a good start to begin chipping away at the painfully manual process of appointment scheduling.

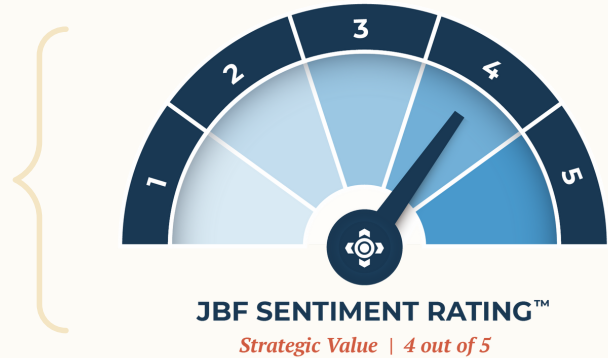


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Area 5

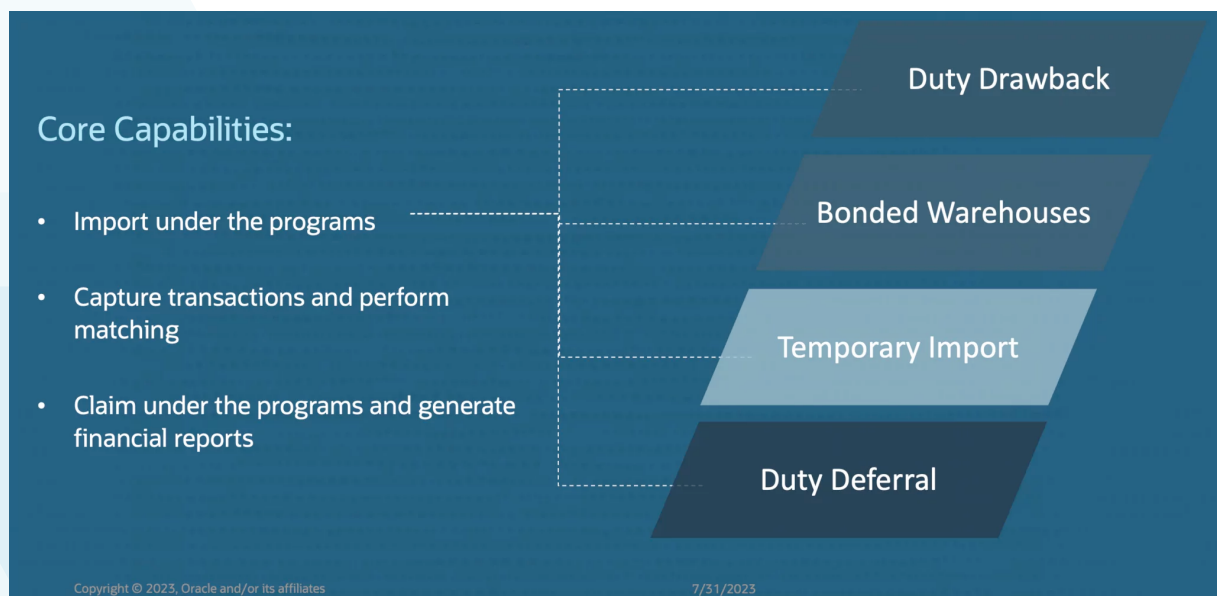
GLOBAL TRADE MANAGEMENT & INTERNATIONAL CAPABILITIES



Most of the Tier 1 TMS platforms started with a very US or North American focus and expanded into NA import/export as their client base expanded. Oracle has done a better job than most expanding international shipping capabilities to move beyond NA import/export and work towards a true anywhere-to-anywhere model and they continue to invest in international capabilities and Global Trade Management.

This year's improvements include the integration of **P44 Ocean Voyage Schedules**, Trade Agreement Qualification enhancements, usability, and restricted party screening enhancements but the biggest improvement is Trade Incentive Programs support. Oracle GTM can now support **Duty Deferral & Drawbacks**, Bonded Warehouses, and Temporary Import Programs.

Trade Incentive Programs for Oracle Global Trade Management Cloud



Source: Oracle Product Development Presentation; © 2023 Oracle and/or its affiliates

Oracle is also beginning to utilize AI/ML to assist with product classification and document understanding for data ingestion. Additional capabilities on the roadmap include expanding trade incentive program support (**Foreign Trade Zone**, Manufacturing under **IMMEX**, Manufacturing drawback) and additional trade agreement qualifications.

Some honorable mentions:

Oracle continues to make improvements in its cloud technology:

- › OCI Gen 2 & Autonomous DB
- › Fast Switch - Improved DR and backup recovery - unplanned cutover in ~30 minutes
- › Cloud Downtime is under 60 minutes now for updates

Oracle Mobile App Improvements:

- › Ship Unit Barcode Scanning
- › Document upload at the shipment stop level
- › Map Enhancements
- › Integration with Digital Assistance
- › Rest APIs for bulk data export for external BI systems



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SUMMARY

In summary, the Oracle OTM conference continues to be an example of what a software users conference should be.

- › Candid user discussion on struggles and wins, both in presentations and individually
- › Meaningful presentations with good audience participation and questions
- › No Kumbaya Oracle/Client joint presentations selling/marketing Oracle (there were a few client/SI presentations that touted the SI a bit much, IMO)
- › Passion from the Oracle representatives to deliver product improvements and client requests
- › A solid communication of the OTM and GTM product vision



About Tony Wayda

Tony Wayda, a Principal in JBF's strategy practice, boasts over 30 years of experience in supply chain solution design, logistics software management, and implementation. His unique blend of operations and technology insight has enabled delivery of practical solutions that simplify supply chain complexities. With leadership roles spanning the 3PL industry, transportation software Product Management, and consultancy, he has served sectors including retail, 3PL, Telecommunication, apparel, grocery, and CPG. Most recently, he led initiatives in DC consolidations, omni-channel implementations, and visibility solutions, reflecting a consistent record of strategic growth, cost reduction, and increased productivity.

About JBF Consulting

Since 2003, we've been helping shippers of all sizes and across many industries select, implement and squeeze as much value as possible out of their logistics systems. We speak your language – not consultant-speak – and we get to know you. Our leadership team has over 100+ years of logistics and TMS implementation experience. Because we operate in a niche – we're not all things to all people – our team members have a very specialized skill set: logistics operations experience + transportation technology + communication and problem-solving skills + a bunch of other cool stuff.

JBF Investor Advisory Services

JBF Investor Advisory Services provides due diligence guidance to private equity and VC firms. We bring decades of log-tech software expertise that has been honed by working closely with our shipper clients to evaluate and implement log-tech solutions.

JBF investment guidance Log-Tech focus areas:

- Transportation Management Fleet Management
- Yard Management
- Parcel Management Routing and Scheduling
- Logistics Modeling
- Digital Freight Brokerages Visibility / Analytics
- Transportation / 3PL Managed Services



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