Agility streamlines operations with OpenText

Global shipping company speeds shipment updates and payments, increases customer satisfaction with integrated information management from OpenText

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Global IT Director, Business Solutions & Support
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Agility moves goods that underpin global commerce. Its services include freight and shipping via land, air and sea for more than 60,000 customers in 100 countries. Constant movement needs constant visibility and management. To secure end-to-end information efficiency, Agility implemented OpenText integrated solutions OpenText™ Captiva™ Capture, OpenText™ Documentum™ and OpenText™ InfoArchive.

Each shipment produces a paper trail of documents, including air way bills, bills of lading, consolidation manifests, invoices and more. Previously, it could take days for paper documents to be sent from the shipment’s origin to its destination so cargo could be processed. In addition, a lack of integration among multiple information systems meant data had to be re-entered from one system to the next for processing to continue.

For decades, Agility relied on a core management system running on a legacy IBM iSeries platform to support all freight forwarding operations. However, the legacy system lacked capabilities essential for today’s customers and markets, according to Deepak Sharma, global IT director, Business Solutions & Support, for Agility. For instance, customers had no means of viewing shipping documents online; instead, they had to wait for documents to be delivered by email or fax. “We had definite room for improvement,” Sharma said. “Visibility is a key requirement in the freight hauling industry and an important component for optimal customer service.”

“It was clear that we needed to improve efficiencies, visibility and integration to shorten cycle times for global shipments, but we needed to meet those challenges without compromising the operational ability of the company.” As a global operation, Agility also needed an enterprise-wide system flexible to meet the unique requirements of operating regions.

Integrated management

After a lengthy evaluation process, Agility chose Captiva Capture and the Documentum enterprise content management platform to provide an integrated, centralized repository for capturing, sharing and managing documents. Within a few years, the shipping company added InfoArchive to preserve and speed access to stored files.

Captiva

Although Agility relies increasingly on electronic modes of communication, the company still generates a significant amount of paper—with most of the documents printed from the freight hauling control system. When shipping personnel in the branch offices scan the paper documents into the system, Captiva automatically transforms them into PDFs, captures index data and associates the PDF documents with metadata for storage in Documentum to enable easy search and retrieval.

Documentum

Documentum is tightly integrated with Agility’s core logistics system and financial applications, ensuring reports and key financial data are automatically stored in electronic format. The Documentum system is available to more than 25,000 Agility users, with up to 3,000 users accessing the system at any given moment. Every eight hours, the Documentum repository receives more than 10,000 new electronic documents through the ERP, customs application and others. In addition, up to 5,000 printed documents are scanned into the system by the branch offices.

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Agility must ensure data and content retention complies with industry requirements, so documents must be retained for 15 to 25 years. Files add up quickly. In 2017, Documentum storage soared at 10 TB of data, with an annual growth rate of 2.5 million documents or almost three TB per year. To ensure convenient, cost-efficient access, the shipping company selected InfoArchive. Active projects, referenced frequently, remain in Documentum for an average of three years. Once completed, project material is moved to the low cost, compliant InfoArchive repository.

**Improved efficiencies and customer satisfaction**

**Enhanced visibility for customers**

The Documentum solution supports Agility’s objective to enhance its customers’ visibility into their accounts, shipping status and key documents. “*Today, our clients expect that they will be able to instantly see their documents. This is a mandatory requirement in our industry, and Documentum makes it possible,*” said Sharma.

The Agility Connect portal powered by Documentum enables employees and customers to access jobs. When they are away from the office, users track shipments in real time with Agility Delivers, a mobile interface. Collection and delivery reports made within the app update the freight forwarding and warehouse management systems while adding a PDF of the Proof of Delivery (POD) to Documentum for reference. Documentum’s built-in security controls ensure users are only able to see the documents associated with their accounts.

**Customer satisfaction, cost savings**

The content management system delivers powerful advantages. “*Now, instead of having to call us and request the documents they need, our customers can instantly access the information themselves, which not only saves them time but also takes the burden off our customer service department,*” explained Sharma.

By reducing strain on employees and eliminating courier expenses, Agility boosted cost efficiency related to information management. “*The dollar savings are significant, but you can’t put a dollar figure on customer satisfaction and that’s probably the biggest benefit of Documentum,*” Sharma noted. “*The system has had a huge positive impact on our customer satisfaction.*”

**Expedited processing, payments**

Previously, supporting documents for an Agility shipment were mailed, faxed or sent via courier from the cargo’s origin to its destination, taking up to three days. With Captiva and Documentum, access is immediate. Not only are costs associated with shipping paper eliminated, but faster shipment processing means reduced time to invoice and expedited payments from clients.

Agility worked with OpenText Professional Services to move documents and metadata from the Documentum production environment to InfoArchive. With swift ingestion rates, InfoArchive ensures information in both environments remain accessible and timely. “*It was essential that we get documents out of Documentum, because it would start taking too long for users to search and pull them out. Performance was a major consideration,*” Sharma said. “*None of the tools that we looked at did that except for InfoArchive.*”

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Global IT Director, Business Solutions & Support Agility
Choosing InfoArchive stemmed from the results-focused partnership. “We really prefer staying with the same vendor versus having multiple systems from different companies trying to talk to each other,” Sharma said. “With InfoArchive, documents are easily accessible and available when needed.”

Compliance support
Documents stored within InfoArchive are accessed by all departments, remaining open to operations and finance personnel as well as the management team. “The fact that we can actually give users direct access to the archive itself is very useful,” Sharma said. Furthermore, InfoArchive compliance features enable flexibility for retention on managed records. Agility will establish retention policies to be managed by the solution while still maintaining granular control over disposition, as needed.

New business dimension
Working in concert, OpenText capture, management and archival capabilities transformed Agility’s operations and sharpened its competitive edge. “The system has brought a new dimension to the way we do business. By giving our customers a single access point for viewing all their shipping documents, tracking shipping status and receiving their invoices, the OpenText solution is a powerful marketing tool for us and has helped us attract new business,” concluded Sharma.

About OpenText
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