

opentext™

Success story

Agility Logistics

Industry

- Distribution & Transportation

Solutions

- OpenText™ Intelligent Capture
- OpenText™ Documentum™
- OpenText™ Documentum xCP™
- OpenText™ InfoArchive

Challenges

- Extended cycle times for global shipments
- Compromised operations
- Delayed response time with growing volume

Results



Secured immediate access to current, archived data



Reduced courier and paper expenses, maximized archive efficiency



Expedited processing, payments



Enhanced customer service, sustainability, competitive edge

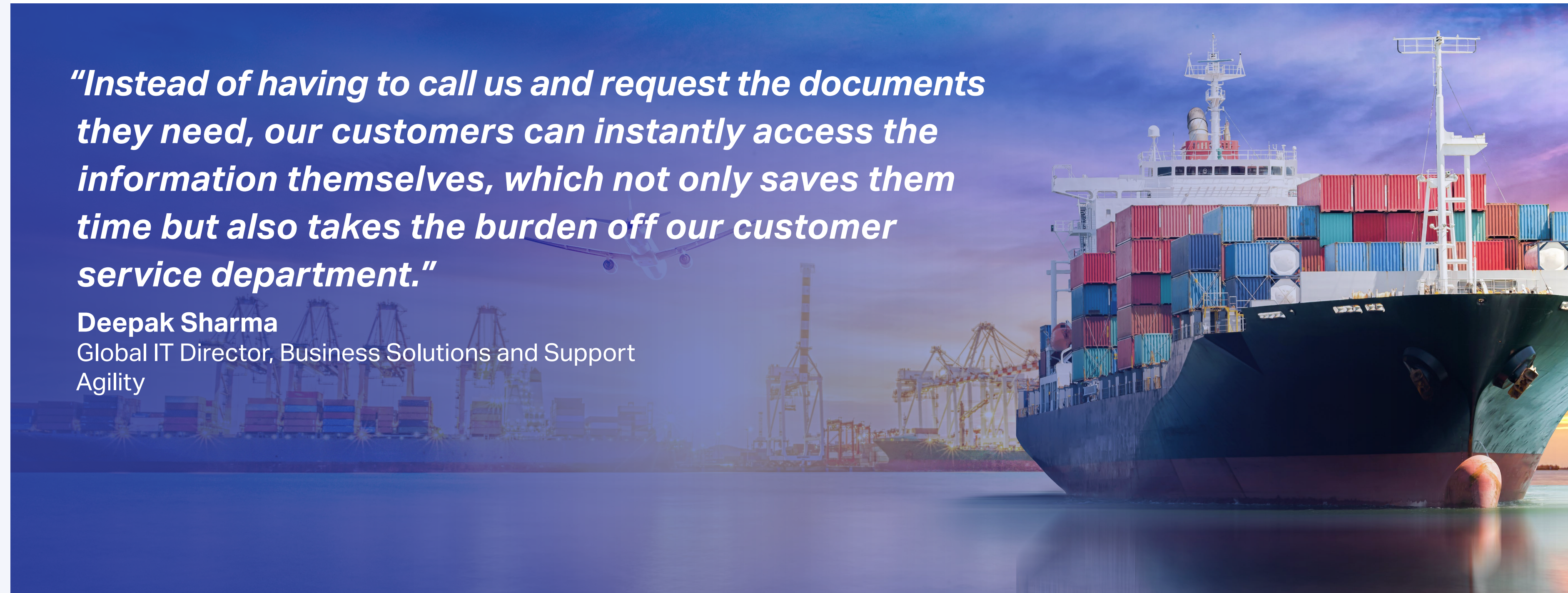


Global shipping company streamlines operations

Agility speeds shipment updates and payments, increases customer satisfaction, enhances sustainability with integrated information

"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."

Deepak Sharma
Global IT Director, Business Solutions and Support
Agility





Global shipping company streamlines operations

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™ Intelligent Capture, OpenText™ Documentum™, Documentum xCP 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 information management

After a lengthy evaluation process, Agility chose Intelligent 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 and Documentum xCP to customize interactions.

Intelligent Capture

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, Intelligent Capture 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 20,000 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. **"Documentum is the backbone of what we do ... it is used all the way by senior management right down to the operator working at the warehouse,"** Sharma said, noting the interface is straightforward and easy to use.

"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."

Deepak Sharma

Global IT Director, Business Solutions and Support
Agility

Documentum xCP

Recognizing business needs vary among its customers, Agility implemented Documentum xCP to build user interfaces tuned to the organizations. For instance, a real estate vertical experiences Documentum differently than a logistics vertical, though the core platform remains the same. ***“That has added a lot of value to how customers or users interact with the system,”*** Sharma said.

InfoArchive

Agility must ensure data and content retention complies with industry requirements, so documents must be retained for 15 to 25 years and some indefinitely. Files add up quickly: Within its first decade of use, Documentum storage totaled 12 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.

Professional and Learning Services

Agility worked with OpenText Professional Services for its initial InfoArchive implementation. ***“Professional Services plays a crucial role with the right sort of engineers, architects, managers. The value of the product is really very tightly linked or integrated to the people you bring it to the table at the end of the day. We have a 24/7 support with OpenText,”*** Sharma explained.

Agility continues to employ Professional and Learning Services to support users adoption and training. ***“It was definitely worthwhile. There’s a whole gamut of courses available online. There’s no***


classroom situation where people had to put their time aside to attend classes. They could go through a course on their own at their own time,” Sharma said.

Long-term strategy and benefits

Digital transformation is not just injecting technology into the well-established shipping industry, it is changing the whole way of doing business, enhancing customer experience as well as improving efficiency and sustainability, according to Sharma: ***“OpenText products are already part of a long-term strategy and as the product matures within the organization, we come up with new ideas and ways to leverage the value of the product,”*** he said.

The Documentum solution supports Agility’s objective to enhance its customers’ visibility into their accounts, shipping status and key documents. Traditionally, the wheels of the supply industry turned on paper, with dozens of copies along the route. ***“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. Pre-alerts, previously sent manually, are automatically delivered to destinations once documents are scanned in Documentum at the origin site. 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. Invoices can be delivered electronically and Documentum’s built-in security controls ensure users are only able to see the documents associated with their accounts.



“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.”

Deepak Sharma
Global IT Director,
Business Solutions & Support
Agility

Customer satisfaction, cost savings

The content management system delivers powerful advantages. By reducing strain on employees and eliminating courier expenses, Agility boosted cost efficiency related to information management. ***“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. The system has had a huge positive impact on our customer satisfaction,”*** explained Sharma.

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 Intelligent Capture 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.

Sustainability

Valuing its role as a socially responsible global corporation, Agility leverages efficiency and data gained through OpenText technologies to refine operations for environmental benefit. ***“When an organization is able to track everything from beginning to the end, then they have much better control over how they can contribute back to improving sustainability, to reducing carbon emissions,”*** Sharma noted.

New business dimension

Working in concert, OpenText capture, management, customization 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

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit [opentext.com](https://www.opentext.com).

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