

# Federated Group deploys Windows CMS portal



The Federated Group

The Federated Group, based in Mississauga, Ontario, Canada, provides a complete range of customs and logistics services across North America and around the world. Federated used Visual LANSAs Framework to deliver a Client Management System (CMS) that integrates directly with existing System i backend systems. LANSAs Client is used for reporting and analysis over operational files and a data warehouse.

**"The CMS serves as a centralized repository of client information"**

**Nancy Riddell**, senior business analyst at the Federated Group, says, "Using LANSAs triggers to update the existing databases saved us customizing over 400 programs and lets us continue to use the existing customs, accounts receivable and freight systems without major modification. With this approach we can modernize and redevelop these systems at our own pace, with minimal disruption to the business."

## The Client Management System

Federated sent its developers for LANSAs training and brought in a LANSAs Services consultant for onsite mentoring. A design committee was set up with key users from the shareholders.

## Meeting Diverse Shareholder Needs

The Federated Group, an integrated group of customs brokers and logistics providers owned by twenty shareholders, is also an IT provider for thirteen other companies.

Federated started using an IBM System/325 years ago and has since evolved to the System i. The company's in-house developed customs, freight forwarding and accounts receivable RPG systems, used by 500 users in over 50 locations, needed replacement. But before embarking on a redevelopment project, Federated decided to first take stock of the way these systems used and stored client information.

"Client information was maintained in several areas and had to be entered multiple times," says Riddell.

"We wanted to centralize client information, so that it could be shared by all divisions."

"Most importantly, we wanted the CMS solution to update client information in our existing systems directly. But we didn't want to change the existing file structures, as it would affect over 400 backend programs."

"We briefly investigated buying a packaged CMS solution, but from past experience we knew that a packaged solution was not going to meet all the shareholder's needs. We needed a solution that we could control ourselves."

"We already knew about LANSAs and had several meetings with them to discuss the best way forward. We decided that LANSAs's productive framework approach would also provide guidance for our RPG programmers who were new to Windows development."

It took Riddell and her team six months to complete the requirement analysis and system design. "Even though all stakeholders are in the same industry, they have different requirements. We used LANSAs's prototyping tool extensively to help refine the system design, which was reviewed in weekly meetings."

"The user committee preferred a LANSAs Windows rich-client user interface to a browser interface. With 500 users at over 50 locations, a zero-install browser interface might have been easier to support, but by using LANSAs's Just-in-Time (JIT) deployment we could automate program distribution and deployment, all the way to the user's PC."

After the user committee approved the design, development took another six months with a team of four.

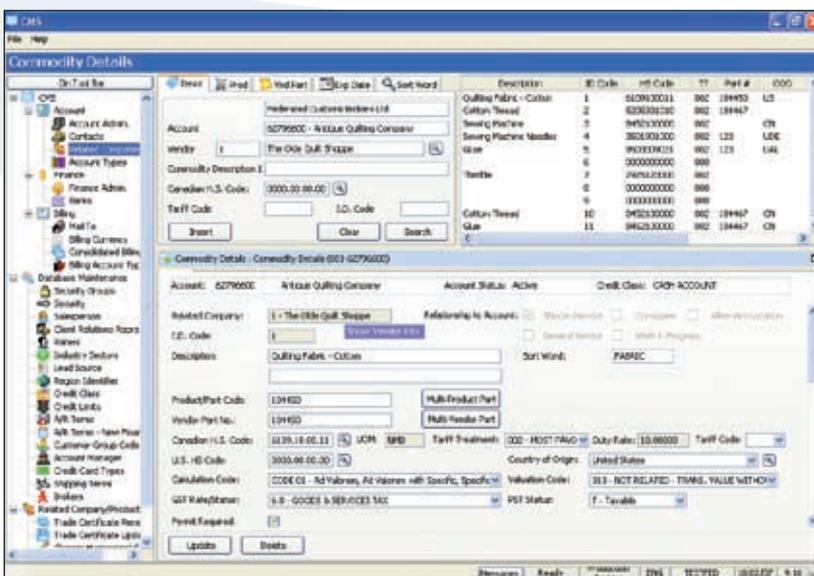
The CMS allows for central management of all client data. This can be quite massive, because as a customs broker, Federated needs records about all the vendors its clients deal with and all products imported or exported.

While areas of the old backend systems were limited in the number of client and contact addresses stored, the new central CMS can handle unlimited invoice, contact and delivery addresses.

The data relevant to the backend systems, such as customs classification codes, rates and address information, is automatically updated by the CMS using LANSAs trigger functions.

Riddell explains that, as the backend systems will eventually be replaced, large portions of backend functionality have already been moved into the CMS. So redevelopment of those systems should be easier.

The CMS gives a complete impression of the account status, including historical statistics and an up-to-date customs and billing summary overview. →



The Federated Group's new CMS system gives a complete impression of the account status, including historical statistics and an up-to-date customs and billing summary overview.

In addition to storing operational information, the CMS also allows the capture of profiling information, such as free format notes, company revenue, employee numbers, industry, regional business activities and branch locations.

"Managers now get a quick and complete overview of an account from a single screen," says Riddell. "The CMS is becoming the central portal for all backend systems."

### Benefits of a Centralized Repository

"The biggest advantage of the CMS is that it serves as a centralized repository of client information," says Riddell. "Our users don't have to jump from system to system and screen to screen to maintain information or enquire on a client."

"The CMS is tightly integrated with our customs, freight and accounts receivable systems with LANSAs triggers, so client data in all backend systems is now consistent and up-to-date. This tight integration let us continue to use these systems without major modification."

"We could never have achieved that kind of control with a packaged solution. We would have had to replace all systems simultaneously, an expensive and high risk approach."

The CMS has its own built-in security, allowing division managers to set up new users, with varying degrees of authority. "Our technical services team used to get involved all the time. Now managers can set up staff access on their own, saving time on both sides."

"We also empowered business users by giving them the LANSAs Client and Crystal Reports bundle for query and reporting. Many user requirements were for reporting and statistical overviews. Now they can do their own reporting."

"The rollout was easy. One IT resource did the LANSAs Client training and trained the users. Now we have at least 30 people producing their own reports and queries. Users just love it."

"All we have to do is make the files known to the LANSAs Repository and the users create their reports," says Riddell.



*The new Client Management System is becoming the central portal for all backend systems and gives managers a complete overview of a client account from a single screen.*

### "Using LANSAs triggers saved us customizing over 400 programs "

Laurel Marshall is operations manager at the Federated shareholder Thompson, Ahern & Co. Limited. Marshall was on the CMS design committee and explains that, "Information in the CMS is very important to us, because we need to be able to track related business plans."

"I am now able to draw out a lot more information than before. I can analyze clients to see if volumes are up or down. I can analyze regions and investigate whether we can develop new business there, do comparative research between this and last year and so on. The information helps us in developing business plans."

"The more you know about a client, the better the relationship can be with them. The information also helps us when negotiating contracts and pricing," says Marshall.

### Next Step is Customer Access

"LANSAs was the easiest route for our first Windows project," says Riddell. "We specifically like the LANSAs Repository and reusable components."

"Even business users can access field descriptions, formulas and help text defined in the repository in their queries and reports."

"Nothing needs to be defined or developed more than once. With RPG we often had to repeat the same code."

While clients currently have Web access to the backend systems using Net.Data applications that offer shipment tracking, inquiries, customs forms and imaged documents, Federated plans to replace this with a LANSAs-based client portal to provide greater functionality.

"We can improve client service by giving real-time access to customs, shipping and billing data. Clients should be able to view and maintain their own products and other data."

There is also a wealth of reports that we want to make available online for the clients," concludes Riddell. ■

### COMPANY AND SYSTEM INFORMATION

- The Federated Group, headquartered in Mississauga, Ontario, Canada and incorporated in 1953, provides cross-border and global logistic solutions, including customs brokerage, freight forwarding, air, ocean and ground transportation, warehousing, distribution, customs consulting and information technology services. Federated has offices in Mississauga, Toronto, Hamilton, Montreal, Vancouver and the major gateways of Niagara Falls, Fort Erie, Sarnia and Windsor. The U.S. operations are based out of Buffalo, New York. For more information visit: [www.federated-group.com](http://www.federated-group.com)
- Federated uses an IBM System i model 520 as a main processor and a model 550 for the deployment of Web applications. Shareholders and their branches have direct connections to the System i in Mississauga. The Visual LANSAs-based Windows programs are automatically distributed using LANSAs Just-in-Time deployment.
- Federated's development team consists of two developers. The support team consists of four technical service analysts, one EDI specialist and one person handling all the user training.