Welcome to the SmartWay Webinar Series

Today's webinar is:

2016 SmartWay Logistics Company Tool Demonstration

Presenter: Matt Payne

Matt has worked at the US EPA for the past 25 years, and has been with SmartWay since its inception in 2001. He is the team lead for the SmartWay Data Development and Management team, which covers tool and database development/enhancement, program design, contract management, data collection and partner support. Matt's academic background consists of engineering, and political science degrees from Michigan State University as well as an MBA and Systems Science degree from the University of Michigan.

SmartWay Transport Partnership

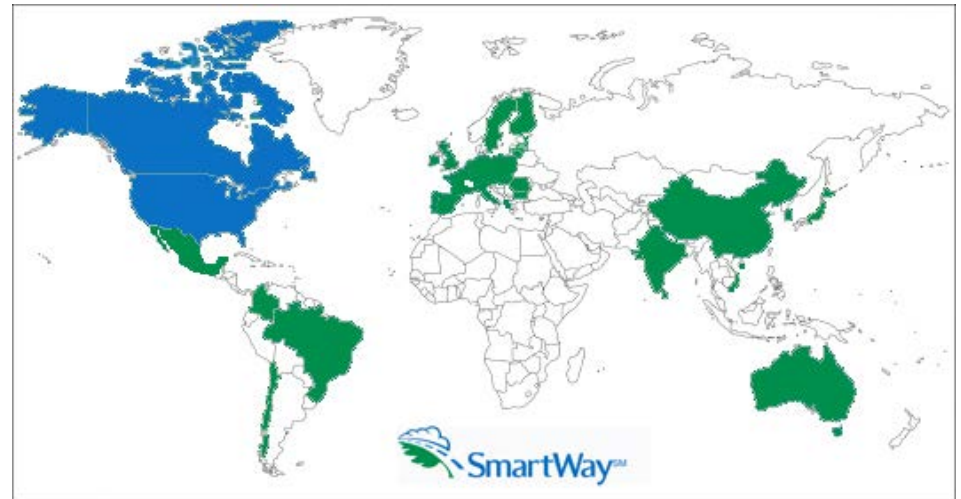## Logistics Tool
Webinar Presentation

Matthew Payne

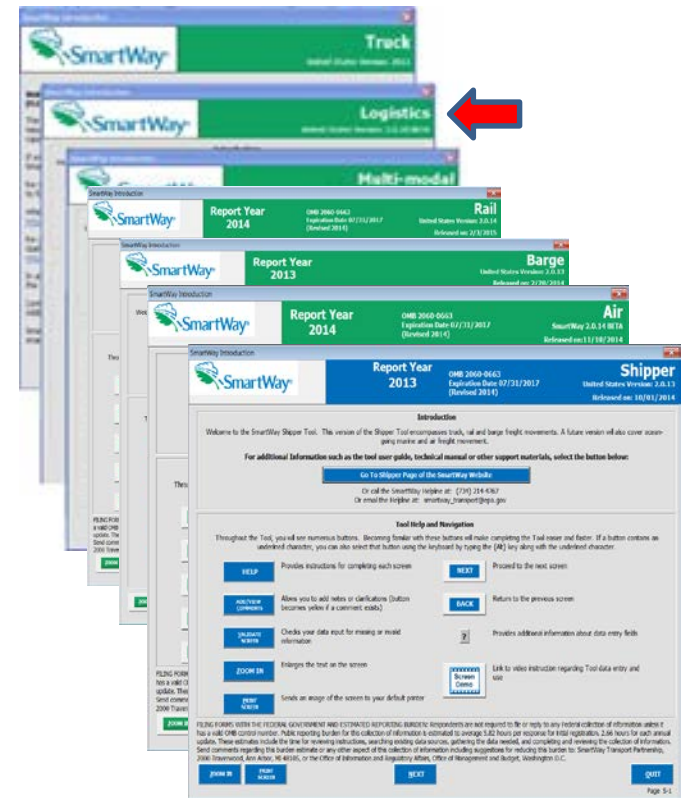US Environmental Protection Agency

July 20, 2016

Background

- SmartWay was initiated as a voluntary market based program with members of the U.S. Freight industry in 2001.
    - Improve the reputation of the freight industry
    - Improve the efficiency and competitiveness of the freight industry
    - Reduce the release of harmful emissions
    - **Fuel Use = $$$ = CO_2**

- In operation since 2004
    - Currently over 3000 Carriers and over 250 Shippers are members of SmartWay
    - SmartWay is the Global Standard in Freight Emissions Reporting
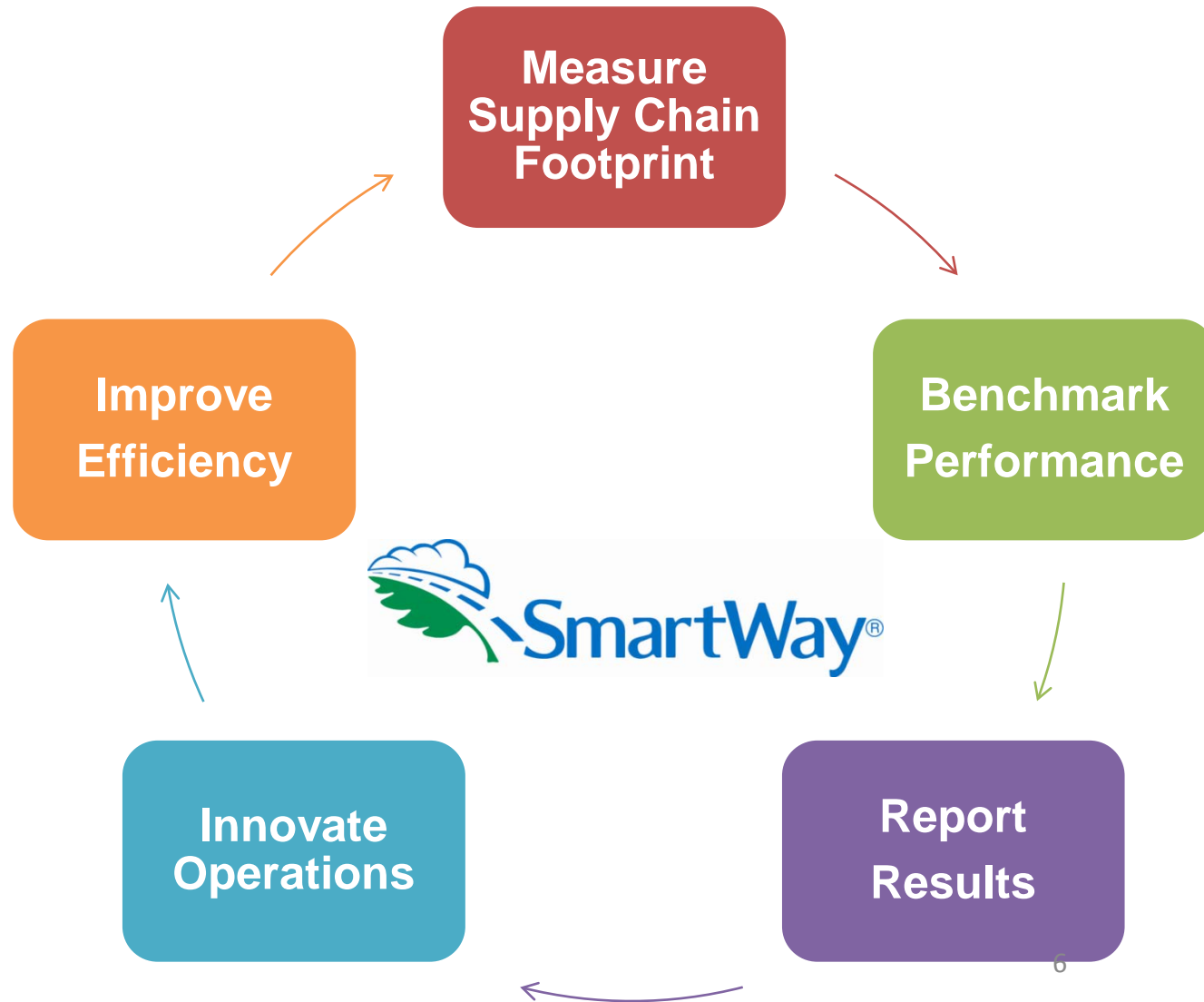   - *Massachusetts Institute of Technology*

SmartWay is an Integrated System

- Carrier Data Collection Tools
  - Truck, Logistics, Barge, Rail, Air, Multimodal Suite
  - Ocean marine emission factors in 2017

- SmartWay QA/QC and Benchmarking Process
  - Provides benchmarking (6 emission metrics)

- Shipper Tool
  - Calculates carrier emission footprints for Shippers

- SmartWay Website
  - General: https://www.epa.gov/smartway/

  - Existing Logistics Partners:
    https://www.epa.gov/smartway/smartway-logistics-company-partner-tools-and-resources
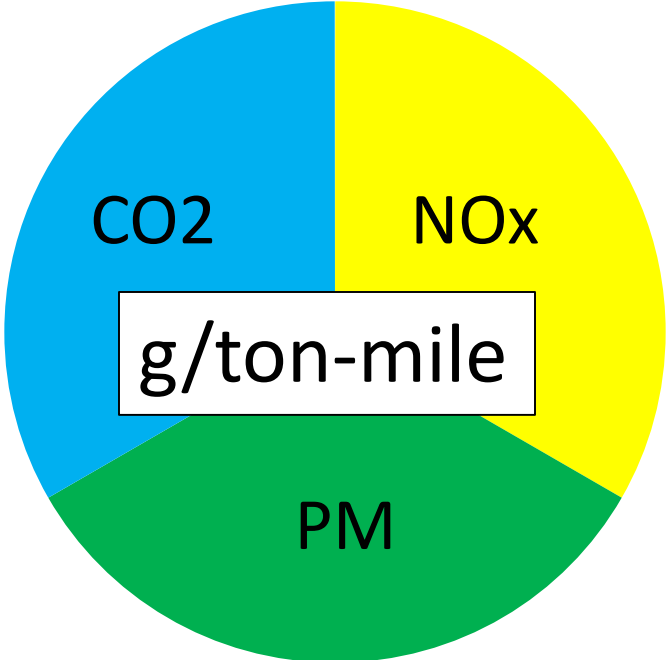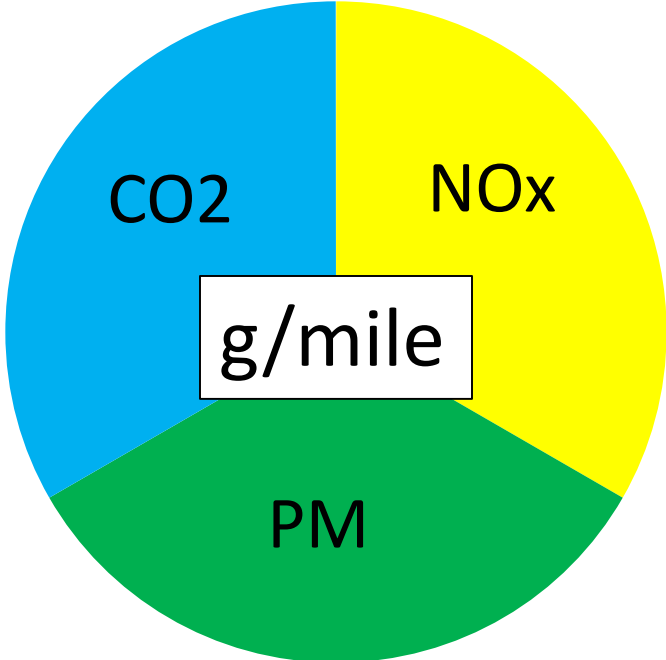
  - New Logistics Partners:
    https://www.epa.gov/smartway/steps-become-smartway-partner

5

SmartWay is continuous improvement for the Environment

- Measure Supply Chain Footprint
- Benchmark Performance
- Report Results
- Innovate Operations
- Improve Efficiency

6

SmartWay's 6 Public Emission Metrics

What do SmartWay metrics actually measure?

CO2 NOx **g/mile** PM

CO2 NOx **g/ton-mile** PM

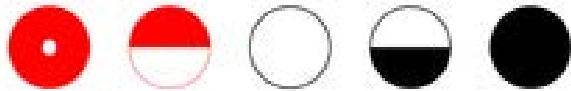|		**g/mile** Amount of pollution for every mile travelled	**g/ton-mile** Amount of pollution for every ton that travels one mile
CO2	A surrogate for fuel efficiency and global warming	Based on miles, fuel used	Based on miles, fuel used, average payload
NOx &PM	Essentially smog and soot, a health concern for drivers and people living near heavy truck traffic (rest stops and truck routes)	Based on age of trucks, class/size of trucks, highway versus urban driving, speed of urban driving, idling, and aftertreatment devices	Based on age of trucks, class/size of trucks, highway versus urban driving, speed of urban driving, idling, and aftertreatment devices, average payload

SmartWay Ranking System
Graphic Representation

Other Ranking Systems
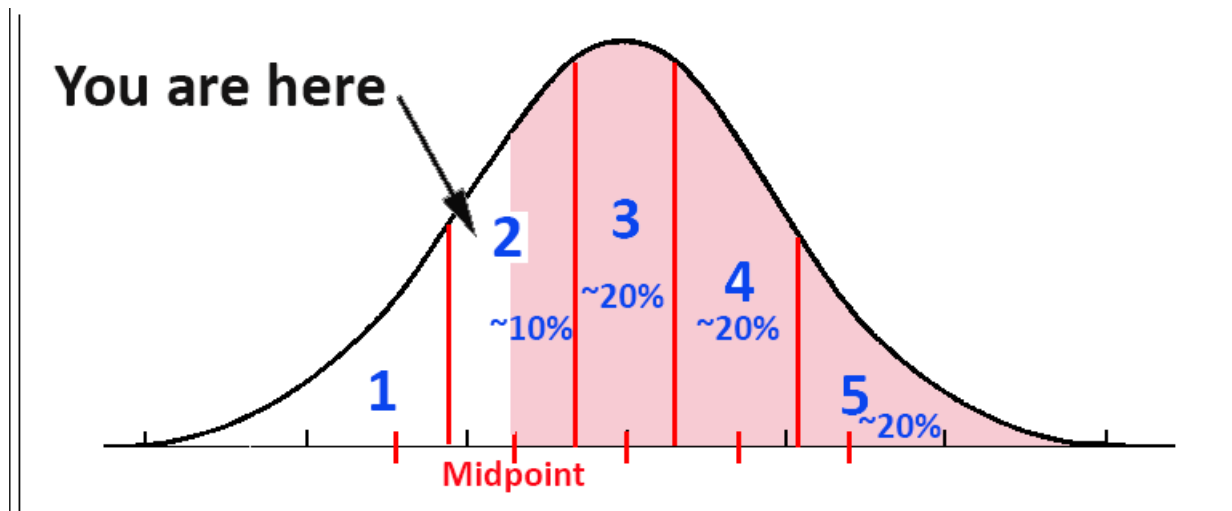# (Or another way to think about SmartWay)

- Remember the old Consumers Reports Car ratings?

- Different aspects of a car were ranked on a 1 to 5 scale (Red ball with the white dot was the best).

- SmartWay has a 1 to 5 ranking system (Performance Rank #) for it's 6 environmental metrics.

- When you are buying a car, you may be more concerned about one aspect more so than another; e.g., engine reliability more so than AC reliability.

- Similarly, shippers may be interested in your CO2 score g/ton-mile score more so than your PM score g/mile score, or they may look at all of them. It's up to the shipper to decide how they will use SmartWay ranking scores.

SmartWay Ranking

- So…how good am I?
- Example: You are a Logistics Company and are in Bin 2 for Grams per Ton-mile.
- This means that at a minimum you are better than 60% of logistics companies in this metric, and could be better than 80% at most. If your actual g/ton-mile is better than the midpoint for bin 2 (what is displayed publicly), then you are likely better than 70% of logistics companies.
- If you are in Bin 5, then at least 80% of your peers are doing better than you.

Understanding Logistics Emission Factors

You are the weighted sum of all the fleets you use

The fleets you use

- Internal to your company
- Invisible to outsiders

The fleet your customers see

- Your Emission Factor=
$$\sum_{k=1}^{n}\binom{n}{k}Your\ carrier's\ emission\ factors\ \mathbf{x}\ \%\ of\ the\ freight\ they\ haul\ for\ you$$

- The best way to improve your emission factor is to use:
  - More efficient modes (rail or barge)
  - Then use SmartWay carriers: If some of your carriers are not SmartWay, encourage the ones you use the most to join first!
  - Then use better performing SmartWay carriers (bin 1 is better than bin 2…)

How Do Shippers Use SmartWay Scores?

- Shippers have something called Corporate Social Responsibility Reporting…
  - They need to determine their emissions from many sources, and freight is one of these.
  - SmartWay provides a standardized way of calculating these emissions.
  - Without SmartWay, many shippers would be asking carriers for their information.
  - Shipper emissions show up on Shareholder reports, Social Responsibility Reports, Carbon Disclosure Reporting, Greenhouse Gas Protocol reporting, etc.

- Relating to SmartWay Carriers, some Shippers:
  - Require their carriers to be SmartWay.
  - Require their carriers to be certain bin levels within SmartWay (1 or 2).
  - Give preferential fuel surcharge rates to SmartWay carriers or high performing SmartWay carriers.
  - Give bonus points in bid proposals and carrier selection criteria.
  - Request carriers submit their SmartWay registration document with a bid.

-

What's New This Year?

- Auto-populate Steps 1, 2, and 3:
  - Name, Contact Information, Fleet Description(s)
- Data Source Descriptions Simplified
  - Moved out of the Activity Data Screen, Replicate for different fuel types
- Less Screens and Less Data Entry
  - Allows quicker navigation to data entry screens for experienced users
  - Data Entry Streamlined
- More options for non-SmartWay carriers

- New Joining Process for New Partners
  - Online form to complete Steps 1 and 2
  - Applicant Status.
  - More intensive SmartWay Partner Account Manager interaction
  - Auto-populate Steps 1 and 2
  - https://www.epa.gov/smartway/steps-become-smartway-partner

Logistics Tool Demonstration

Review: Input Carriers

SmartWay Logistics Tool: ABC Logistics, Inc.: Logistics Division					
Input Carriers	**Activity Data**	**% SmartWay**	**Data Display**		
Instructions	Export Carriers	Match My Carriers	Outside Data Import	Manual Input SmartWay Carriers	Manual Input Non-SmartWay Carrie

- Option 1: Manual Input (best for companies with 100 or less carriers)
- Option 2: Export last years info into a .csv file and modify it.
- Option 3: Export a Master .csv file of all SmartWay carriers and then delete
- Option 4: Carrier matching function (best for companies with thousands of carriers)
  - There is a bit of process to this but if you have to search 10,000 carriers, this will shorten your time
  - If you have 100, then it will take more time than manually adding
- Option 5: Create a .csv from scratch

- Instruction manual: https://www.epa.gov/smartway/logistics-multi-modal-and-shipper-partner-2015-tools-guide-importing-carrier-data-using

Review: Managing SmartWay Data Requirements

- It's pretty much the same year-to-year; i.e., data requirements don't change.
- Develop a good record keeping system.
- Develop an "information funnel."
    - Develop standardized reports or file formats for people to send you data.
    - SmartWay has data sheets you can use as templates.
- A lot of the data SmartWay requires is data that is good for you to track for your bottom line.
- Data is power – use data reporting to improve your bottom line – and your position in the company. SmartWay is okay being the "bad guy" – get the data and use it.
- Invest in Big Data. Companies are gaining competitive advantage through the use of big data.   SmartWay reporting should be a small component of your overall data handling capabilities.
- Consultants are available to assist you.
- Your Partner Account Manager can help you think of strategies to improve your data.
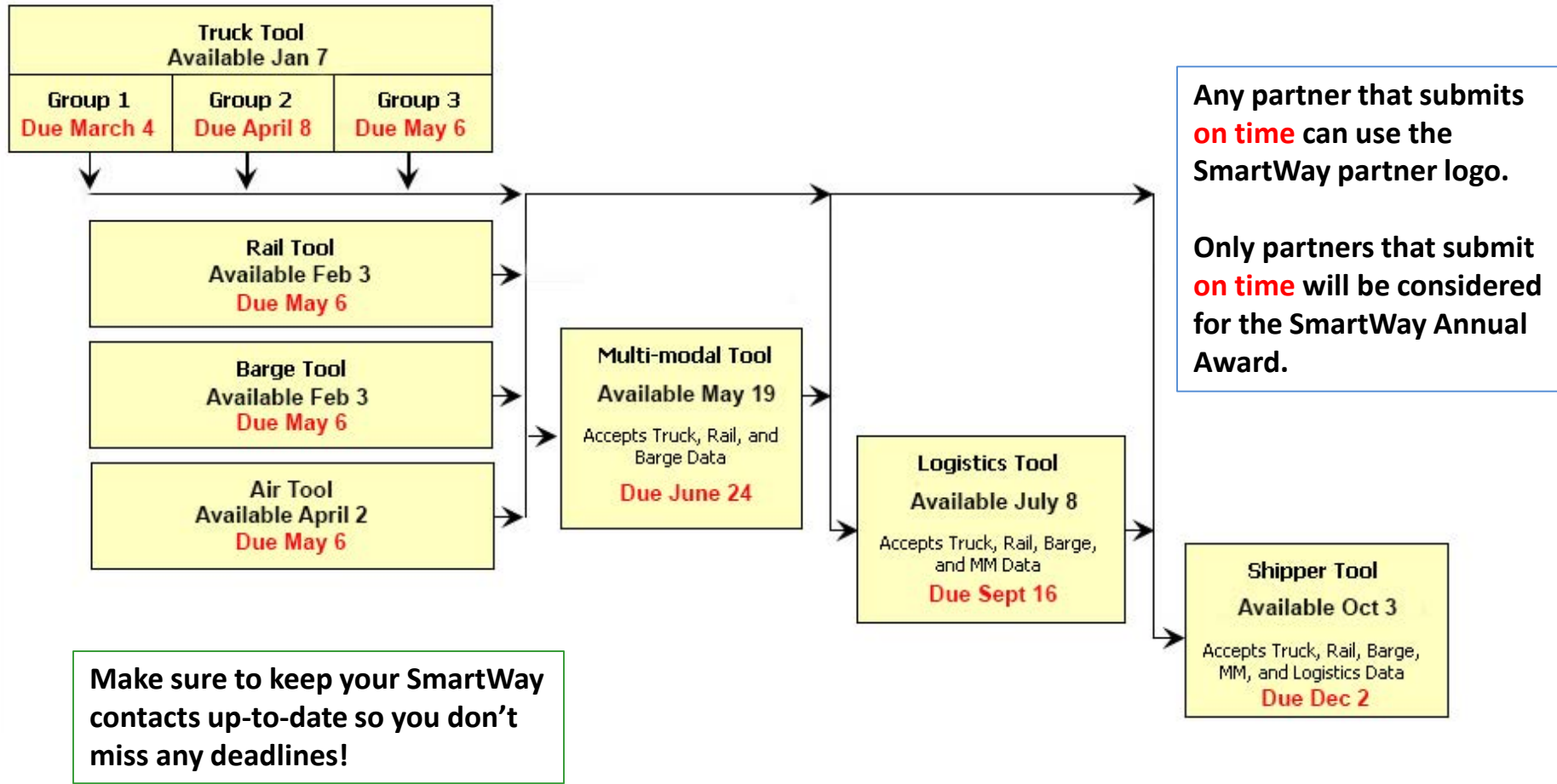
Additional points to Remember

When completing the Logistics Tool

- SmartWay presents the carrier identification data *as supplied by the carrier*
  - Includes multiple identifiers: SCAC, DOT, MCN, address, plus others

- Include your U.S. and Canadian freight
  - Canada is participating in SmartWay and has a Canadian version of the program/tools identical to the US. (except in metric and French)

- Please send BOTH .xls and .xml files to your Partner Account Manager

- Please include different Primary (working) and Executive Contacts

- Remember to save your progress as you fill out the tool, and when you save it, make sure it is saved in a place that others in your organization can access.

- If you are promoted to a new position, or leave the company, PLEASE make sure your replacement knows about your SmartWay responsibilities.

- If in doubt on anything (SmartWay related), <u>call your PAM!</u>

2016 SmartWay Schedule
(Tool Information Flow, Availability and Due Dates)

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

Truck Tool
Available Jan 7

Group 1	Group 2	Group 3
Due March 4	Due April 8	Due May 6

Rail Tool
Available Feb 3
Due May 6

Barge Tool
Available Feb 3
Due May 6

Air Tool
Available April 2
Due May 6

Multi-modal Tool
Available May 19

Accepts Truck, Rail, and Barge Data

Due June 24

Logistics Tool
Available July 8

Accepts Truck, Rail, Barge, and MM Data

Due Sept 16

Shipper Tool
Available Oct 3

Accepts Truck, Rail, Barge, MM, and Logistics Data

Due Dec 2

Any partner that submits **on time** can use the SmartWay partner logo.

Only partners that submit **on time** will be considered for the SmartWay Annual Award.

Make sure to keep your SmartWay contacts up-to-date so you don't miss any deadlines!

Thank you for your attention. Questions?

SmartWay website: https://www.epa.gov/smartway
SmartWay Hotline: 734-214-4767
SmartWay email: smartway_transport@epa.gov

Carrier Matching

SmartWay®

The SmartWay Portal

The SmartWay Portal is a resource for SmartWay Partners and eligible companies that are interested in partnering up with SmartWay. The portal options that are listed below reflect what type of partner/prospect you are (e.g., a Truck Carrier), as well as whether you are working with the US Environment Protection Agency or Natural Resources Canada. For example, partners can use this portal to obtain their SmartWay Registration document and SmartWay Logo files. Partners and prospects who are either Logistics Carriers or Shippers can use the Carrier Matching function to assist them in filling out their tools. If you have any questions, please contact your SmartWay Partner Account Manager or SmartWay recruiter.

- SmartWay Registration Document

- SmartWay Partner Logo Resources

- Sample SmartWay Partner Press Release (docx)

- SmartWay Carrier Matching

Carrier Matching

$EPA Webinar Test Partner

SmartWay Carrier Matching

The Carrier Matching function allows partners to match their carrier lists from their in-house system with the data submitted by current SmartWay carriers. Matching carrier lists will make it easier for partners with a large number of carriers to quickly and accurately complete their SmartWay Tool. Select the options below to match your carriers.

A note about performance: a file of about 2,500 carriers with 4 identification fields took approximately a minute to process. The more identification fields you have the greater the time it takes to perform the automated matching function. It is strongly recommended that you do not include identification fields that do not add value to finding your carriers in the SmartWay database, and only include 'real' values for identification. For example, you should not put 'n/a' in fields for which you don't have a real value.

1. How to use the SmartWay Carrier Matching Function
2. Upload Your Carrier Data
3. Find Your Carriers in the SmartWay Database
4. Send Emails to Your Carriers (coming soon)
5. Create a Carrier CSV file for Importing into your SmartWay Tool
6. Delete Your Carrier data from the Carrier Matching Function

- Example CSV File
- Starter CSV File

CLOSE

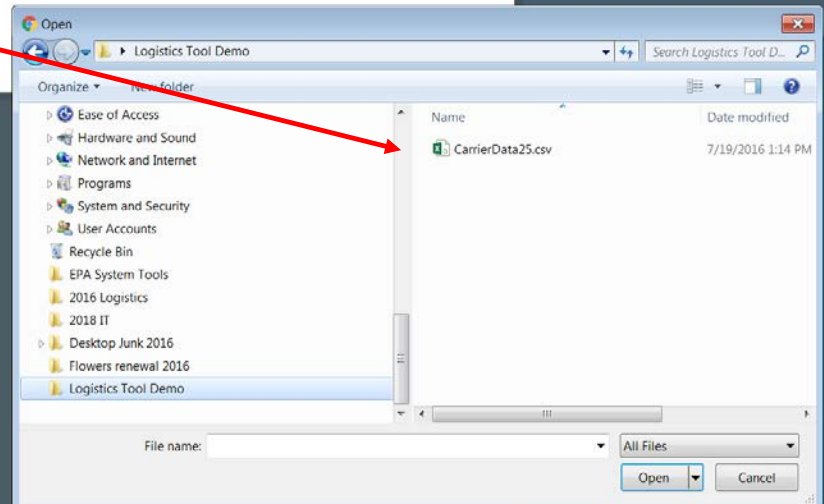# Carrier Matching

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Overview

The SmartWay Logistics, Multi-modal, and Shipper Tools include a Data Import function. This function reduces the need to manually enter carrier activity data, allowing you to create a file containing your company's in-house carrier data in SmartWay's prescribed format. Some partners have found it challenging to use this import function because of difficulties matching their carrier data with the corresponding SmartWay data. For example, carrier names and addresses often do not match. In addition, SCAC, MCN, DOT, and NSC codes are not always available or reported, and when they are, some carriers may use the same code for more than one of their fleets. Since SmartWay carrier partners can define multiple fleets and have the flexibility to change their data each year, there is no completely reliable way to match carrier data by solely using internal SmartWay identifiers from year to year.

The new Carrier Matching Function is designed to make it easier to match your carrier data with the carrier data in the SmartWay Database. There are two approaches to using the function.

1) **Matching based on unique identification fields from your in-house system included in a previous year's submission.** Include a unique carrier identifier from your in-house system/database in your current year Tool submission. Ideally this would be a unique code your company uses to identify each carrier you use. You can also use the carrier's name from your in-house system, the carrier's address, SCAC, MCN, DOT, NSC, and/or phone number. *The identification information you supply should be unique to that carrier.* These identifiers can be an alphanumeric value up to 100 characters in length, and will be stored in the SmartWay Database along with SmartWay's identifier for that partner record and carrier fleet, creating a match between your data and SmartWay's data. This match can then be used by you in future year submissions as a reliable and consistent way to match your data with the SmartWay carrier partner record. You should pick and use an internal identifier that will remain constant year to year. Note: the carrier-specific identification information you include in your submission is not shared with any other SmartWay Partner.

2) **Matching based on SmartWay Carrier data.** This approach uses carrier identification information you have in your carrier database that may match the information the carrier supplied in their SmartWay submission. This includes the carrier's address, SCAC, MCN, DOT, NSC, and/or phone number. If the Carrier Matching Function fails to find a match using both of the two previous approaches, it will attempt to find matches based

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You can use the 'Rerun' button to rerun the automated matching function. Carrier matches confirmed by you will remain 'confirmed' unless that carrier entry is removed from the SmartWay database.

Filter Options:

Match Results	All Results ▼	Reporting Status	All Status ▼	Filter

You have 24 carriers that meet your current filtering options. Displaying 1 – 24.

Match Results	Reporting Status	Your Mode	Your Carrier Name	Your ID#1
Not Found		Add	A new Carrier	NEW1
Match Found	Reported	Add	Ardwin Incorporated	ARDWIN
Match Found	Reported	Add	Armstrong Transportation & Trailers, LLC	ARMSTR
Match Found	Reported	Add	Buchanan Hauling	BUCH
Match Found	Reported	Add	BX Solutions	BX SOL
Match Found	Reported	Add	CDN Logistics	CDNLOGIC
Match Found	Reported	Add	Continental Group LLC	CFSYS
Match Found	Reported	Add	Cooper Freight Service, Inc.	COOP
Match Found	Reported	Add	Covenant Transport	COVTRANS
Duplicates Found		Add	Danny Herman Trucking Inc	INC
Match Found	Reported	Add	Daybreak Express, Inc.	DAYBREAK
Match Found	Reported	Add	Delta Freight Systems LLC	TRNSFRT
Match Found	Reported	Add	DRT Transportation LLC	LLC
Match Found	Reported	Add	Easley Transportation	EASL–MEM
Match Found	Reported	Add	E–Transport Carriers, Inc.	ETRANSP
Match Found	Reported	Add	Fischer Trucking, Inc.: Fischer Trucking Inc.	VLI

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(dropdown: All Results / Not Found / Match Found / Probable match / Possible Match / Confirmed Match / Duplicates Found)

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Match Results [All Results ▼]   Reporting Status [All Status ▼]   [Filter]

All Status
Has Not Reported
Reported
Pending Approval

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Filter Options:

| Match Results | Match Found ▼ | Reporting Status | Reported ▼ | Filter |

You have 18 carriers that meet your current filtering options. Displaying 1 – 18.

Match Results	Reporting Status	Your Mode	Your Carrier Name	Your ID#1
Match Found	Reported	Add	Ardwin Incorporated	ARDWIN
Match Found	Reported	Add	Armstrong Transportation & Trailers, LLC	ARMSTR
Match Found	Reported	Add	Buchanan Hauling	BUCH
Match Found	Reported	Add	BX Solutions	BX SOL
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Match Found	Reported	Add	Fischer Trucking, Inc.: Fischer Trucking Inc.	VLI
Match Found	Reported	Add	Greentree Logistics, Inc.	GTL
Match Found	Reported	Add	JNJ Express Inc.	JNJ

Carrier Matching

Exported Carrier Data .csv File

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	SELECTED CARRIER EXPORT FILE																				
2																					
3	Carrier Data File Input Instructions																				
4	Do not modify columns A - H																				
5																					
6	You may leave existing (carrier-based) data in place or overwrite with your own data as needed																				
7																					
8	Ignore (but do NOT delete) columns I through M, column O, column R, and column S. Deleting these columns will cause the import process not to work properly.																				
9	Any information entered into columns I though M, O, R, and S will be ignored during the import process.																				
10																					
11	Following is a description of the data required for columns N through T:																				
12	> Enter Data Availability Option (allowable values a, b, c, or d) in column N																				
13	> For Data Availability Options 'a' or 'b', enter ton-miles in column P. Maximum allowable value is 9.99 x 10^18																				
14	> For Data Availability Options 'a', 'c', or 'd', enter total miles in column Q. Maximum allowable value is 9.99 x 10^18																				
15	> For Data Availability Options 'b' or 'c', enter the average payload per truck or railcar IN SHORT TONS (2,000 lbs), in column T.																				
16																					
17	You may add carrier identification data in columns Y through AN. The headers you specify (in row 22) must match exactly to the allowable values as described in the import/export document.																				
18	The maximum length for all values in these columns is 100 characters. Any information entered into columns U through X will be ignored during the import process.																				
19																					
20																					
21																					
22	Carrier ID	Carrier Na	Mode	SmartWay	SCAC	MCN	DOT	NSC	Column I	Column J	Column K	Column L	Column M	Data Avail	Column O	Ton Miles	Total Mile	Column R	Column S	Average Payload	
23	32549	A & Z Truc	Logistics		AZTD	MC510449								a		15987587	925796			17.3	
24	1E+09	Approved	Logistics		ACTC									b		32569874	1696348			19.2	
25	32223	Associated	Logistics		ASAF,ASGY	MC151219	DOT24042							c		48750859	2389748			20.4	
26	32518	Atech Logi	Logistics		APKI	MC437810	DOT1047145							a		2.37E+08	13857154			17.1	
27	33145	Atlantic Lo	Logistics		AQGC	MC397574	DOT2227192							b		82547967	3949663			20.9	
28	32622	Atlantic-Pa	Logistics		APEN	MC873473	DOT1621913							c		1.34E+08	6784596			19.8	
29	31929	Atomic Tra	Logistics		ATYL	MC657583	DOT2243043							a		8574967	508478			16.9	
30	32115	Audit Logis	Logistics		N/A	MC433634	DOT2229343							b		36287496	1823492			19.9	
31	32431	AV Logistic	Logistics		AVOG	MC414502								c		53014957	2548796			20.8	
32	32672	Avery Truc	Logistics		AVYT	MC241978	DOT2294564							a		25487589	1278947			19.9	