

THE

# PAPER TRAIL

A paperless trucking operation is technologically possible, but don't expect paper to go away any time soon.

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For a number of years now, motor carriers have been among the many companies ridding their operations of paper. They have done so for a number of reasons: improved efficiencies, streamlined processes and even a desire to “go green.”

According to Matt Johnson, senior product manager at Omnitracs, the key ways document capture improves a carrier's efficiencies include increased driver productivity during downtime, fewer stops (for courier services and LTL carriers), and improved billing payment cycle because delivery documents get to the back office sooner.

Fleets use various technologies to automate driver paperwork, says Pete Allen of MiX Telematics. Workflow apps, for instance, allow fleets to turn documents into digital forms drivers can fill out with their in-cab mobile device or a smartphone or tab-

let. The MiX Go forms app is one such product, providing easy data entry and allowing drivers to capture signatures, scan barcodes or take a picture.

The paperwork burden varies by particular segment, application and load type. In truckload, the paperwork involves loads and trips. LTL carriers look at paper “a little differently,” explains Ben Wiesen, vice president, product at Carrier Logistics Inc. “It's more about flow. The difficulty the LTL industry has is keeping the paper flow up with the freight flow.” Document management systems help “close the gap between the paper flow and the freight flow,” he says.

While fleets use less and less paper, the information — the data — that used to be on

a piece of paper still needs to be captured, stored, and applied to everyday business functions, from the truck to the back office, shop, HR and management. As paper use has dropped, fewer filing cabinets line office walls. But fewer pieces of paper do not mean less data. In fact, there is more data than ever being collected and managed, because technology makes it readily available.

Of course fleets capture a wide array of data from their vehicles such as GPS location, speed, miles travelled, etc. Vehicle sensors can also transmit tire pressure and temperature, reefer temperature, door openings and more.

For instance, Best Logistic Group, Kernersville, N.C., collects vehicle information

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— Ben Weisen, Carrier Logistics Inc.

through the PeopleNet onboard computing platform, including engine performance, driver performance and hours of service, along with capturing data from paper documents.

Because let's face it, paper still exists in trucking. Even fleets that have made a concentrated effort to become paperless still do business with customers that require hard copy documents. Hazardous materials and other specialized loads require special paperwork.

Smith & Berry Trucking, Penticton, British Columbia, collects and scans a wide range of documents. "Everything from freight bills, proof-of-delivery, shipper documents, safety documents, tractor-trailer inspection documents, payables and driver to driver qualifications," says Dorothy Vankoughnett, controller and IT manager. "The sky is the limit when it comes to data capture." Her company uses a document management system from Microdea.

Paul Davis, manager of process improvement and training at Best Logistic Group, says his company captures data from all load documents such as bills of lading, proof of delivery, lumper receipts, fuel receipts, driver envelopes and others. The documents are turned in by drivers and then imaged and indexed with McLeod's Document Power. Document capture had an "immediate impact on our receivables," he says. Before implementing the document capture technology, it averaged 7.8 days to bill. Now it is consistently 3.5 days.

According to Vankoughnett, in addition to improving back office efficiency, it's the little things that can add up to real savings. They don't spend as much on postage, and they have cut printer ink and paper costs. "You don't have to have real high-level ROIs," she says. "There are simple ways you can measure your return."

### Capturing data

When it comes to capturing data from documents, there are a variety of options.

"We see a variety of technologies used to capture documents," says Jay Duquette, TMW Synergize sales engineer. "Fleets use in-cab mobile communications devices, in-cab scanners and mobile apps on smartphones — which is a growing area." Drivers also still use kiosk scanning services at truck



**Smith & Berry has been using a document management system to capture data for 16 years. The Penticton, British Columbia-based carrier has seen improved efficiencies across the board, says Dorothy Vankoughnett, controller and IT manager.**

stops to get shipping information back to the home office as quickly as possible.

Best uses in-cab scanners in about 10% of their trucks. The rest use truck stop scanning or mail or drop off the paperwork. When an image is needed immediately, drivers use their cell phones to photograph a document.

Tyler Ashworth, a product development specialist at Apex Capital, notes that customized company mobile apps drivers can use is another avenue. "There are apps to help you manage your fuel card accounts, assist with digital document management and image capture for paperwork solutions, and load searching and booking that help with day-to-day load management," he says.

For instance, Transflo Mobile from Pegasus TransTech, Tampa, Fla., is a mobile app that allows drivers to scan and transmit documents using their smartphone.

The types of documents fleets now manage has multiplied in recent years. Ten or twenty years ago, most documents came back as a scanned image — as a tiff or PDF file, Duquette notes. Now, they are likely to be in a variety of formats including picture files, video files and other types.

### Managing documents and data

"Capturing the data is easy," says Jerry Robertson with Bolt System, a provider of internet-based fleet management software based in Nashville, Tenn. "It's what you do with it that matters." Fleet management products provide a way to process vehicle-generated information and make it readily available for use in dispatch, billing, management, the safety department and in the shop.

For documents that have been scanned or photographed, many enterprise software products provide a means to integrate those

documents and data of all types so they can be easily accessed and used by personnel throughout an organization. As TMW's Duquette notes, the devices used to collect documents in the field "do a good job of managing it in the field; we want to integrate these documents.

"We partner with a lot of companies to facilitate getting documents from the cab." Those documents are then stored in a central location and are searchable by authorized personnel.

Vankoughnett says integration between various systems was key to the improvements her company has seen. "Everything has improved." All of the systems they deploy, from their fleet management system to mobile communications and shop management system, are integrated with the document management system. If they were standalone systems that didn't integrate, "it would be harder to get the efficiency out of them," she says.

### Driver impact

Many of these technologies have made some aspects of a driver's day much easier. But the driver still has to collect the data. Carriers want systems that make managing data and documents simple. "They want a solution that allows drivers to focus," Duquette says.

Whether the driver is using an in-cab mobile comm device, a smartphone or a scanning kiosk, "you want to ultimately take the burden off the driver."

As CLI's Wiesen explains, "There's a good reason the industry talks about a 'professional' driver," noting that drivers also have to be customer service reps and technology experts. "It's not an easy job because of all the proficiencies they need to have, and the trou-

ble they can get in if they make a misstep,” he says. And while these added responsibilities can add pressure, the technologies they are using can help make non-driving duties easier. “Even though he is collecting more data than ever, he’s doing less work than in the past to gather that data.”

Many fleets are automating driver paperwork with workflow apps, says Pete Allen, MiX Telematics. These apps turn driver paperwork into digital forms drivers can fill out on an in-cab mobile device, smartphone or tablet. The MiX Go forms app provides easy data entry and allows drivers to capture signatures, scan barcodes or take a picture.

Vankoughnett says her company just implemented automated workflows through their PeopleNet platform. It allows them to develop specific forms for each location with instructions for that location. “The driver doesn’t have to remember that at this place, I have to do this and at that place I have to do that,” she says.

### A paperless future?

The paperless office concept has been around for many decades. Many think the technology exists now for trucking companies to operate without paper. But government regulations, shipper needs and a company’s comfort level may hold that concept back.

“The tools are all available now,” Duquette says, but paper still provides a “comfort level.”

Wiesen agrees the capabilities are there. “Clearly it could be done. It’s worked for the couriers; it will eventually expand to the rest of the industry.”

Ken Weinberg, vice president of sales and co-founder of Carrier Logistics Inc., says he thought going paperless would be slower in the LTL segment. He says a very high percentage of truckload fleets use EDI and other paperless processes, but the percentage for LTL carriers was low. Part of that is due to the fact that there are more customers for an LTL carrier and “they don’t know who their customers will be from day to day.”

Government requirements are one stumbling block, Vankoughnett says, noting that when the fleet runs loads across the border, they have to submit electronic documents for clearance, but in case something fails, the driver is still required to carry the paper

documents. Even with electronic logging devices, if there is any problem the driver has to revert back to a paper log.

And government reporting requirements continue to grow, Robertson says, noting that new rules for transporting food require additional reporting and documenting for food processors, receivers and trucking companies.

Davis says he “only hopes we can become paperless,” adding that the company has gotten further than he thought they would after six years of using document and data capture technologies. “I’m looking forward to six years from now.”

In the end it will all depend on customers, Davis says. Until they go paperless, fleets will always have paper. 

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