![omnitracs logo]

Driver Workflow for the ES Platform

## Implementation Overview

What is Driver Workflow?

Driver Workflow automates or verifies many of the critical tasks that a driver completes at a typical stop, providing the fleet with timely and comprehensive information. At the same time, it lessens the driver's workload through a simplified interface.

At its most basic, Driver Workflow replaces many existing macro messages with a set of stops, tasks, and forms that are clear and easy to follow. Drivers no longer need to search for critical information buried in a text-heavy format, nor look through multiple notifications to find everything related to a single stop.

Driver training needs are reduced because next steps are prompted. Memory is much less of a factor. Mandatory and optional tasks are easily distinguishable, as are their completion status.
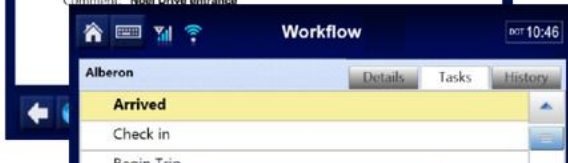
Most often, the type of stop (pickup, delivery, fuel, etc.) determines the driver tasks and associated information they require. Tasks can be driven by other conditions too, such as time of day.
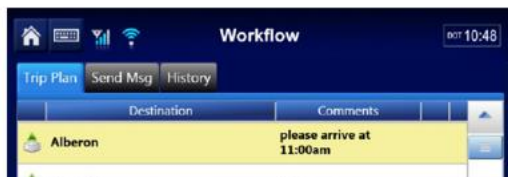
The major elements of Driver Workflow are hierarchical. At the top is the Trip Plan.
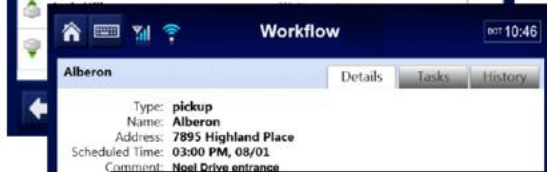
Trip plans have stops, and stops have details. What kind of details depends on the type of stop.

Stops also have tasks. Some tasks are mandatory and some are optional.

Tasks usually have forms, but not always. Fields in the forms can be mandatory or optional. Some fields are pre-populated.

Tasks in Driver Workflow usually center on the information that the driver manually sends to dispatch, but not always. For example, arrival and departure notifications can take place in the background, without any driver intervention.

Ultimately, Driver Workflow simplifies things. The driver no longer has to find and read individual notifications about the stops on his trip. Instead, he receives a single trip plan that consolidates all stops into one notification. The plan houses the details, tasks, and forms associated with each stop.

## Is Driver Workflow an out-of-the-box solution?

No. It needs to be integrated into your specific Transportation Management System (TMS). It may also need to be customized, because no two companies do business alike. For example:

- Load assignments and trip plans vary.

- Information sent before and after a stop is never exactly the same.

- Fuel stops are handled differently.

These and other business processes may require Driver Workflow to be tailored to your organization.

What kind of business processes are we talking about?

Your drivers already have a workflow, although it may not be formally written down. It is the simple pattern of stops and activities that occur every day. Omnitracs calls it the Driver Workflow. Your company's workflow is probably a variation of these basic steps.
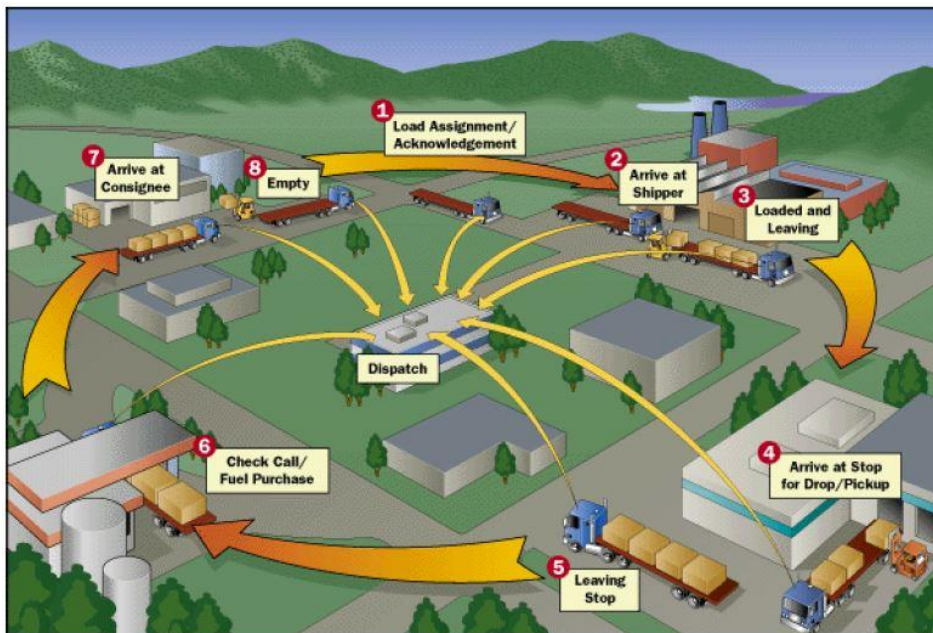
1. Driver receives a load assignment (also known as a stop list or trip plan) and sends a notification acknowledging it.

2. At a pickup, he notifies you that he has arrived by filling out an Arrived at Shipper form.

3. After loading, he completes a Depart Shipper form with the details of the load. He also sends a notification when he departs the site.

Basic Driver Workflow

4. Interim stops follow a similar pattern. He notifies you that he's arrived by completing an Arrived at Shipper (or Consignee) form.

5. After loading (or unloading), the driver departs and sends you a notification that he's on his way, along with details about what he picked up or delivered.

6. At a fuel stop, he informs you of his arrival, completes a form about the fuel taken on board, and informs you when he departs.

7. There may or may not be additional pick-ups and drop-offs that day.

8. At the end of the day, the vehicle may be empty. However, the dispatch may continue the next day. Additional tasks (tractor and trailer inspections break or delay notifications, etc.) are likely to be part of your driver's typical day.

Is there a difference between customization and integration?

Yes. Customization makes changes to stop types, details, and forms so that they conform to the way your company does business. Integration connects Driver Workflow to your dispatch or route-generation system so that data can flow between the two of them.

Customization is optional. Integration is necessary.

No customization is required if your processes are the same as those in the basic Driver Workflow.

Customization can be minimal, depending on business patterns. As long as the basic tasks and required information are close to the basic Driver Workflow, you can rearrange forms, adjust data labels, and rename stop types fairly easily.

Major customization may be called for to create new stop types, different tasks, rearranged sequencing, additional notifications, or fields for specialized data.

You can create the integration yourself using an in-house team (with or without consultants), or you can contract with Omnitracs Technical Services group to handle it.

Customization is different. All customization must be done by Omnitracs Technical Services.

The scope of customization effort is specified in a negotiated Omnitracs Services Request.

Can I change my business processes during the implementation of Driver Workflow?

Yes. While examining the communication tasks between dispatch and driver, you may decide to simplify the way you do business. You may want to bring them into alignment with the basic Driver Workflow, or you may want to take this opportunity to enhance the tasks you ask of your drivers.
To save time and money, identify these changes BEFORE you begin customization and integration.

While examining your processes, you may decide to:
- Improve or streamline the work that a driver does at a stop.
- Automate macros that are not part of the Driver Workflow.
- Change what your dispatchers include in their trip plans.

What is the biggest factor influencing the integration effort?

The number one factor affecting the degree of integration needed is your Transportation Management System (TMS). Your Customer Service Representative (CSR) needs to know:
- Is it home-grown or made by one of the major suppliers? Which one?
- How customized is it?
- Where is it hosted?
- Which QTRACS platform do you integrate–AS/400 or Omnitracs Services Portal?
- Who makes changes to your TMS, you or someone else?
- What other systems does it interact with?

Omnitracs Technical Services will have additional questions for you.

> A TMS can run macros in one of two ways: native mode (direct) or interpreted mode (stand-alone).
>
> Each requires its own approach to Driver Workflow integration.

What else do I need?

Here is a list of basic prerequisites you need to satisfy in order to bring Driver Workflow to your organization. You must have:
- A back-end dispatch or route-planning system that supports a Web Services client. This includes but is not limited to AS/400, Windows, and UNIX systems.
- Existing integration with the AS/400 or Portal version of QTRACS. Driver Workflow is not compatible with QTRACS Web, QTRACS Windows, or Direct CI customers.
- An MCP110, MCP200, or MCP50 for testing.

If you plan to integrate Driver Workflow yourself, you also need:
- An AS/400 Web Services Toolkit (if you use the AS/400 platform).
- The ability to do integration work on that system. Having the system is not enough. You (or your developer) must be able to modify and maintain it.
- Developers who are comfortable with Web Services and a TMS system with access to the internet (for native integration).
- The ability to intercept macros for translation to workflow notifications in both forward and return directions (interpreted integration).
- Access to the Omnitracs Software Development Kit for Workflow.

What other decisions will I need to make?

Once the prerequisites are satisfied, you need to address additional important questions. The decisions you make to questions like these will shape Driver Workflow at your company:

• Will you map your existing forward and return macros in order to minimize impact, or will you take this opportunity to modify them?

• Which macros will you use and/or replace?

• What will govern automated arrival and departure? (Default radius, ignition status, idle time, etc.)

• What stop types do you need? The base types are pickup, delivery, and fuel stop. Will you need others?

• What tasks will belong to each stop type?

• Will you incorporate vehicle inspections as tasks?

• What additional information do you want to capture, beyond what is acquired by your existing macros?

• What other Omnitracs services will your drivers use?

Who are the key personnel?

From your side, it is critical that you identify a business sponsor or management stakeholder early. Your Operations Manager is a likely candidate. You also need to select a project manager and a lead technical resource.

From the Omnitracs side, your Customer Service Representative or your Professional Services Technical Consultant works with you to make initial design decisions and plan the entire implementation.

Early in the process, a Technical Consultant from Omnitracs Professional Services group joins the team to analyze your integration needs. This helps you make an informed decision about who should do it. Omnitracs provides basic support material and answers questions if you choose to do the integration.

Professional Services also helps you evaluate your customization options. With advice from your CER, your project manager and the Technical Consultant examine your business processes. Together, you map your existing macros to the stops, tasks, and forms that make up Driver Workflow.

What does the step-by-step process look like?

```
                                    Start

                          Discuss with
                          Account Mgr
                            or  CER

                          Scope with                         Design and
                          Omnitracs                           document
                          Professional
                           Services
                                                             Write code
                          Sign contract

                                                                Test
                           Identify                          application
                        Sponsor & key
                         IT contact
                                                            Train initial
  Select internal   No   Omnitracs for  Yes   Meet w/        drivers &
    team &/or             integration?      Omnitracs PS    dispatchers
   consultants

                                            PS creates       Conduct pilot
    Determine                                Omnitracs
    high-level                             Statement of
   requirements                                Work

    Refer to                                                  Evaluate
    Omnitracs                               Sign SOW           results
   wiki and other
   documentation

    Customer        While integrating...                      Revise       PS bills for work
    develops                                PS develops      application      performed
   integration                              integration                      under SOW

            Yes                      No                      Train drivers
                      Customize                                 and
                         ?                                   dispatchers

    Meet with                                                Implement
   Omnitracs PS                                              fleet-wide

  Initiate/modify      Finalize                                 End
    Omnitracs        requirements
   Statement of       with PS
      Work
```