Welcome to the SmartWay Webinar Series

Today’s webinar is:

2017 SmartWay Logistics Company Tool Demonstration
Webinar Housekeeping

• Submit a question via the Questions pane on your GoTo control panel.

• After the presentation, as time permits, our EPA presenter will answer questions submitted via the Questions box.

• Please complete the survey at the end of today’s webinar. Your feedback is important to us!
Webinar Housekeeping

The presentation will be available at:

www.epa.gov/smartway/smartway-webinars-events

Note: Today’s webinar is being recorded.
Congratulations 2017 SmartWay Affiliate Honorees!

Read about the outstanding work these Affiliates accomplished in support of sustainable shipping.

Learn about SmartWay
- Overview of SmartWay
- Why Freight Matters
- How SmartWay Advances Sustainable Transportation Supply Chains
- Sustainability Accounting & Reporting
- SmartWay Program Successes
- Trends, Indicators & Partner Statistics (TIPS)

Meet our Partners & Affiliates

Participate in SmartWay
- How to Participate in SmartWay
- How the SmartWay Partnership Works
- Become a SmartWay:
  - Shipper
  - Logistics Company
  - Carrier
  - Affiliate
- Tools & Resources for Partners & Affiliates

Use the SmartWay Brand

Upcoming Webinars & Events
- Education Webinar: 5/17/2017
- Livable Streets vs. Deliverable Streets
- Tool Demo Webinar: 5/24/2017
- Multimodal Tool Demonstration
- Freight Matters Webinar: 6/14/2017
- Boosting Freight Sustainability at Lower Costs
- Tool Demo Webinar: 6/15/2017
- 2017 SmartWay Air Tool Demonstration

More SmartWay webinars & events
Select the “Past Webinars/Events” tab shown below.

**Webinars are free:** Please register promptly because registration may be closed to new attendees after 12:00 noon on the day of the webinar.

**View SmartWay Webinars**

**Freight Matters! Webinar Series:** Hear from leaders in the industry about freight-related trends and issues that matter to your business

**Suggest a Webinar Topic:** If you would like to see a webinar about a particular topic, email your idea (smartway_transport@epa.gov) with the subject line "SmartWay Webinar Suggestion."

**Event Type Legend**

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<thead>
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<td>Education Webinar</td>
<td>5/17/2017</td>
<td>Livable Streets vs. Deliverable Streets</td>
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<tr>
<td>Tool Demo Webinar</td>
<td>5/24/2017</td>
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Matt has worked at the US EPA for the past 27 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.
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 coming in 2018

- 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 and Logistics Applicants: https://www.epa.gov/smartway/become-smartway-logistics-company-partner

- Ocean marine emission factors coming in 2018
SmartWay is continuous improvement for the Environment.

1. **Measure Supply Chain Footprint**
2. **Benchmark Performance**
3. **Innovate Operations**
4. **Report Results**
5. **Improve Efficiency**

SmartWay is a program that focuses on reducing the environmental impact of supply chains through innovative operations and continuous improvement.
SmartWay’s 6 Public Emission Metrics

What do SmartWay metrics actually measure?

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<tr>
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<th>g/mile</th>
<th>g/ton-mile</th>
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<tr>
<td><strong>CO2</strong></td>
<td>Amount of pollution for every mile travelled</td>
<td>Amount of pollution for every ton that travels one mile</td>
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<tr>
<td><strong>NOx</strong> &amp; <strong>PM</strong></td>
<td>Based on miles, fuel used</td>
<td>Based on miles, fuel used, <strong>average payload</strong></td>
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<tr>
<td><strong>CO2</strong></td>
<td>A surrogate for fuel efficiency and global warming</td>
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</tr>
<tr>
<td><strong>NOx</strong> &amp; <strong>PM</strong></td>
<td>Essentially smog and soot, a health concern for drivers and people living near heavy truck traffic (rest stops and truck routes)</td>
<td>Based on age of trucks, class/size of trucks, highway versus urban driving, speed of urban driving, idling, and aftertreatment devices, <strong>average payload</strong></td>
</tr>
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</table>
SmartWay Ranking System
Graphic Representation

Performance Range #
SmartWay Performance Report for Carriers  
(Public Data: What Your Customers Can See)

Click down arrows to filter data by column categories. Select one or more items in the dropdown checklist.

To search by name, SCAC or MCN, click CTRL + F to bring up the search dialogue box, then type in the 4 letter SCAC, the 8 digit MCN, or all or part of the company name.

Performance Ranking=midepoint of the performance range for the metric

Note: gm=grams/mile and gtm= g/ton-mile

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https://www.epa.gov/smartway/smartway-carrier-performance-ranking
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.
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 =
\[ \sum_{k=1}^{n} \binom{n}{k} \times \text{Your carrier's emission factors} \times \% \text{ of the freight they haul for you} \]

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…)
What Data Will I Need to Complete the Tool?

- Tons-miles, miles and possibly average payloads per carrier
- We provide four ways to input your data
What’s New in This Version?

Version 2.0.16a of the Logistics Tool contains a number of updates and revisions to the prior version, 2.0.15. These updates have been implemented to enhance the usefulness and clarity of the Tool, and are summarized below:

- A note on new security warnings has been incorporated. Microsoft has instituted new security warnings that appear in some versions of Excel. The SmartWay files are still safe, and in the same format as previous years. Instructions are provided to navigate through the new Microsoft security warnings.
- New SmartWay Categories have been added for Multimodal carriers: Surface, Surface-Air, Surface-Marine, and Surface-Air-Marine.
- Additional validation checks have been added for Barge carrier product density and Surface-Air Multimodal carrier payloads.
- Average carrier volumes have been added to the Input Summary reports.
- A “save” option has been added to all reports to allow for exporting to Excel format.
- Miscellaneous text and format updates for clarification.

• Short Story: Good News- Not much new from last year!
Review: Input Carriers

- Manual Input (best for companies w/ <100 carriers)
- Data Import
  - 1: Export a Master CSV file and delete carriers you don’t use
  - 2. Manually build a CSV file from Export Selected Carriers and modify it.
  - 3: Create a .csv from scratch (use the example Carrier CSV file as a starting point)
  - 4. Start with your CSV from last year and add or subtract carriers
- Instruction manual: [https://www.epa.gov/sites/production/files/2017-05/documents/420b17021.pdf](https://www.epa.gov/sites/production/files/2017-05/documents/420b17021.pdf)
- Carrier matching function
  - Best for companies with tens of thousands of carriers
  - Accessed in the SmartWay Partner Portal
Review: Input Carriers

1. Export a Master CSV file and delete carriers you don’t use
   - Good for a large number of carriers
   - Generate a CSV using the Export Master File
   - Open in Excel and delete carriers (rows) you don’t use
   - Enter data for your carriers
Review: Input Carriers

2. Manually build a CSV file from Export Selected Carriers and modify it.
   • Good for smaller number of carriers
   • Manually select carriers from the tool and use the Export Selected Carriers Button
   • Open in Excel
   • Enter data for your carriers
Review: Input Carriers

- 3: Create a .csv from scratch (use the example Carrier CSV file as a starting point)
  - Create with your in-house IT system
  - Use an example CSV file as a template
  - Use the Carrier Matching Function to identify which of your carriers are SmartWay

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<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
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<td>&gt; Enter Data Availability Option (allowable values a, b, c, or d) in column I</td>
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<td>12</td>
<td>&gt; For Data Availability Options 'b' or 'c', enter the average payload per truck or railcar in SHORT TONS (2,000 lb), in column L</td>
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<td>13</td>
<td>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.</td>
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<td>14</td>
<td>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.</td>
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</table>

| 22 | Carrier ID | Carrier Na Mode | SmartWay | SCAC | MON | DOT | NUC | Data Avail Miles | Total Miles | Average P | Column M | Column N | Column O | Column P | Column Q | Column R | Column S |
|----|------------|-----------------|----------|------|-----|-----|-----|-----------------|-------------|-----------|----------|----------|----------|----------|----------|----------|----------|----------|
| 44 | 36791      | l-Bridge Logistics | OBBL     | MC690006 | DOT25575 | N/A |     |                 |             |           |          |          |          |          |          |          |          |
| 45 | 37586      | 15 Logistic Logistics | OFLG     | MC595741 | DOT29431 | N/A |     |                 |             |           |          |          |          |          |          |          |          |
| 46 | 36483      | 3rd Choice Logistics | FCOS     | MC383561 | DOT24275 | 700 |     |                 |             |           |          |          |          |          |          |          |          |
| 47 | 36854      | 3 Rivers Logistics | TVQI     | MC378381 | DOT22593 | 700 |     |                 |             |           |          |          |          |          |          |          |          |
| 48 | 38336      | A & C Trans Logistics | ACBB     | MC835978 | DOT22823 | N/A |     |                 |             |           |          |          |          |          |          |          |          |
| 49 | 38726      | A.M. Trans Logistics | AMNO     | MC224875 | DOT22187 | N/A |     |                 |             |           |          |          |          |          |          |          |          |
| 50 | 36975      | Ace Logistic Logistics | ACEI     | MC41479 | N/A |     |     |                 |             |           |          |          |          |          |          |          |          |
| 51 | 36991      | Adams Th Logistics | AHWE     | MC239399 | DOT00000 | 0000 |     |                 |             |           |          |          |          |          |          |          |          |
| 52 | 36257      | Addison T Logistics | ABFD     | MC38834 | DOT23233 | N/A |     |                 |             |           |          |          |          |          |          |          |          |
| 53 | 36210      | ADM (logi) Logistics | ADOS     | MC27976 | N/A |     |     |                 |             |           |          |          |          |          |          |          |          |
| 54 | 36960      | Advanced Logistics | AVDR     | MC319784 | DOT29386 | N/A |     |                 |             |           |          |          |          |          |          |          |          |
| 55 | 36356      | Aeromet V Logistics | AERI     | MC003399 | DOT37786 | 01 |     |                 |             |           |          |          |          |          |          |          |          |
| 56 | 36312      | Afn, LLC Logistics | AFWN     | MC46693 | DOT22000 | N/A |     |                 |             |           |          |          |          |          |          |          |          |
| 57 | 36943      | Agmark Lc Logistics | AKFO     | MC94924 | DOT24487 | 17 |     |                 |             |           |          |          |          |          |          |          |          |
| 58 | 36357      | AGT Global Logistics | AGSK     | MC57088 | DOT22361 | N/A |     |                 |             |           |          |          |          |          |          |          |          |
| 59 | 36354      | Airways Fl Logistics | AFRG     | MC28807 | DOT22171 | 22 |     |                 |             |           |          |          |          |          |          |          |          |
Review: Input Carriers

1. Start with your CSV from last year and add or subtract carriers
   - Best for carriers that don’t change their carrier base often
   - Beware name changes or company reorganizations that may change your carrier’s identification year-to-year
   - The csv format (columns) have changed from last year
   - Still workable- just follow the directions closely
   - You can always tweak your inputs manually
Review: Carrier Matching

• In Carrier Matching, you can add your own unique identification data to your carriers that will carry over to next year (for carriers that use a unique carrier code instead of standard SCAC or MCN or DOT numbers)
• Note: Carrier matching is not a “Hail Mary” pass to the endzone, but rather a series of first downs to narrow down and help match your carriers.

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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 Environmental 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.

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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
Review: Carrier Matching

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Upload Your Carrier Data

Use the ‘Choose File’ button to locate and select the carrier file containing your carrier activity and identification information. This carrier file needs to be in a specific format. This format is described in the How to use the Carrier Matching Function. Once this file has been selected an ‘Upload File’ button will appear which you will use to upload your data so it can be matched with the SmartWay submissions sent in by your carriers.

NOTE: the data in this file is NOT reported to SmartWay. It is saved within the Partner Portal while your carrier data is matched with the SmartWay carrier submissions. This matching makes it easier for you to identify SmartWay carriers and report their information in your SmartWay Tool.

Ryder Supply Chain Solutions

Find Your Carriers in the SmartWay Database

The table below shows the Match Results and Carrier Status for your carriers. Select the value in the Match Results column to see more details of the automated search results, or to change the Match Results when the results are incorrect. You can filter the list by using the options below. If any of your carriers are ‘Not Found’ you can click on the phrase ‘Not Found’ to perform additional searches for that carrier’s submission in the SmartWay database.

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.

Ryder Supply Chain Solutions

Create a Carrier CSV file for Importing into your SmartWay Tool

Use this page to export your carriers to a Carrier CSV file which you can then import into your SmartWay Tool. This CSV file will be identical to the CSV file you uploaded into the Partner Portal with two exceptions:

- SmartWay carriers with an approved submission will have their SmartWay carrier ID added to their row. Having the correct SmartWay Carrier ID will alleviate the need for you to search for and select your SmartWay carriers in the Tool.
- SmartWay carriers without an approved submission, SmartWay carriers who have not reported, and non-SmartWay carriers will be grouped together into non-SmartWay carrier rows by mode.

Note: It is strongly suggested that you do not overwrite your original CSV file. SmartWay suggests that you save both the original input CSV file and the exported CSV separately.

Matching Results Summary
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.
Thank you for your attention

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