# An Unbiased Guide to Electronic Logbook Implementation for Small and Medium Sized Trucking Companies by Greg Munden

With the apparent impending passing of regulation mandating the use of Electronic Logging Devices (ELD's) late next year in Canada, many Canadian trucking companies are only just now beginning to search out solutions to comply. Fortunately, or unfortunately, depending on your perspective, the market place is full of solution providers

Starting down the road to ELD (or ELOG) implementation can be fraught with challenges and pitfalls. While there is certainly getting to be more and more



information available online and from other sources, often times this information and advice is being provided by ELD providers and is, ultimately, slanted to selling their product. This blog is intended to the relay our experience of implementing ELD's in a small Canadian trucking company. It is an unbiased set of suggestions and lessons learned (sometimes the hard way) about what you might want to consider when going through the process of ELOG implementation.

Included in this Blog will be access to our suggestions for:

- Part 1 ELDs versus EOBRs what's the difference?
- Part 2 Operational realities (and opportunities) of moving to ELDs.
- Part 3 Finding a software and hardware supplier;
- Part 4 Implementation and Driver buy-in;
- Part 5 Harnessing the Power of an ELD/Telematics System
- Part 6 Telematics Features and Capabilities

## Part 1 - ELDs Versus EOBRs - What's the Difference?

An ELD (or ELOG) and an EOBR (Electronic Onboard Recording device) are two very different things - although both may be rolled into one package. From a regulation standpoint, the government is finalizing the requirement for an ELD, or electronic logbook, not an EOBR.

From a very basic standpoint, to comply with the upcoming regulation, you need an ELOG (Electronic Logbook), aka an ELD (Electronic Logging Device), to take the place of your drivers' paper logbook. Nothing more. There are many companies producing a straight forward ELD product that, so long as it meets the requirements pending in regulation, is all you need to comply.

There are also products (EOBR's) that provide telematics data. This is the data that is often used in the back-office by management and operations staff to analyze the data flowing out of your truck to understand things like:

- Driver behaviour and performance (Driver Scorecard)
- Cycle times
- Time spent at locations (customer or receiver delays)
- Fuel consumption and idle time

Make no mistake, this data is very powerful and can often be very useful in improving your trucking operation. That said, it nearly always comes at an additional cost, and requires a commitment from management that the data being gathered will actually be used for something. The ability to pull a report that is never pulled is a bit redundant, don't you think?

More and more, the ELD and EOBR are being packaged together as one product - or, as one product with modules that can be added on with the features you like. Many software companies in this space really started out as developers of EOBR systems designed to provide telematics information to trucking company management and have simply added on an ELOG option to comply with upcoming regulation and retain market share. Look at the product carefully as these may be stronger in telematics and late to the game in developing a good ELOG solution.

On the other hand, companies whose sole initial purpose is to develop an ELD solution to take advantage of a rising tide marketplace, may be well behind in developing the telematics pieces that you may be looking for to provide operational information.

There are companies out there who balance both an excellent ELD system along with strong telematics data. Best advice - do your homework.

## Part 2 - Operational Realities (and Opportunities) of Moving to an ELDs

There are some operational realities of moving to an ELD system that every company needs to consider and plan for. The most fundamental question you need to ask yourself is, "Does my business currently operate within the hours of service regulations?" Of course, you do! No, really, you need to sit down and look at your runs and the current practices of your drivers and dispatchers and determine if you comply.

The fundamental reason for introduction of ELD's is to improve industry safety by having a hire level of comfort that trucking companies and their drivers are working a "reasonable" number of hours each day, without the ability to cheat the system. The fact is, once you make the switch to ELDs, the opportunity for your driver to falsify his logbook goes way down. For instance, systems will be required to automatically place drivers "on-duty, driving" when the embedded gps system in the device senses that the vehicle is moving a certain speed for a specified minimum length of time. Same thing for recording locations - all automatic now. Things like unit odometer readings, unit #'s, etc. will all be pulled automatically from the truck's ECM.



While this may cause you to be twitching in your seat a little, it's important for you to know that there are also a whole bunch of positives that come with this. There will be no more tickets received for "clerical" or form errors - like the driver forgot to include some information on his logbook. Your drivers' logbook will always be complete, will always be up-to-date, and will always be legible. On the back end, your safety manager or dispatch team can stop reviewing all logbooks, and just review the exceptions - which good ELD systems should automatically identify. For instance, if a driver exceeds his hours of service, your system should flag this logbook day only, and identify the regulation that the driver is out-of-compliance on (for example - Failed to take the required time off-duty before continuing).

Now, if as a trucking company owner, you are anything like me, this gives me great comfort in knowing that my drivers are always in compliance and their logbooks are accurate; or, if one goes out of compliance, it is brought to your attention to be dealt with rather than relying on someone thumbing through hundreds of logbook pages to try to determine compliance. Much better for you to be aware and take steps to prevent this in the future than await the CVSE auditor to pull up and start uncovering issues.

Okay, so step 1 is to start looking with a critical eye at your current level of compliance. If you find that you aren't in compliance, now is the time to start making changes to your operation to make sure you can continue to operate successfully in an ELD environment. Many industry colleagues that I know that have taken this step have had to make changes where it became obvious that certain runs just are not possible given the hours of service requirements. This has led to operational changes, and often meant some serious conversations with shippers who have, up to this point, had unreasonable expectations for deliveries. One thing is for sure, in an ELD environment, if you can't do it there won't be anyone else who can legally either - the proverbial "levelling of the playing field" the has been the talk of the industry for decades.



## Part 3 - Find a software and hardware supplier you are comfortable with.

Okay, so you're ready to move ahead into the world of ELD's. There are literally hundreds, maybe thousands of choices when you start down the road of ELD's – and the choices are growing every day. From large, multi-national companies who have successfully developed ELD solutions for the US market, to the kid down the street developing the next smart phone app to track your hours of service. Some things to consider:

## **Solution Provider Size**

The largest companies can provide a turn-key solution that can be implemented with proven software, training aids and resources, however, this option may come at a hefty cost and with very limited flexibility in terms of customization. These companies are more likely to have the resources at work to ensure they comply with all pending legislation, including such important details as ECM connectivity and third-party accreditation (the latest Canadian requirement holding up regulation). But don't expect a tailored solution here, this is often-times a one-size fits all approach.

On the opposite end of the provider spectrum, are the very small, independent firms or even individuals who are burning the candle at both ends to develop solutions that, often times, might be simpler, easier to use and inexpensive to implement, but are almost solely dependent on a small company or individual who may not have the resources to fully develop the product, nor comply with the complex regulations coming down the pike. Of course, these providers are often ready to promise-the-world in terms of customizing a solution to meet your every need.

You may find the sweet spot somewhere in between. There are a number of mid-size companies emerging in Canada who balance the technical depth with deep enough pockets to provide a robust, "local" solution, while not being so rigid in their development that they aren't willing to provide reasonable custom solutions to meet your needs – and maybe at a cost that doesn't break the bank.

#### Hardware and Software Considerations

One of the fundamental questions that you need to determine early on in this process, is whether cellular connectivity is enough, or if you require a satellite link with your ELD/telematics system. Some solution providers do not offer satellite connectivity for this system, and if this is important to your operation, may narrow your choices for vendors. Satellite communication can be a very expensive option, so really think about how imperative constant communication really is. Cellular-based systems have real-time communication and updates while the vehicle is in a cellular service area, but store information when out of service, uploading it as soon as it returns to cellular service. In many cases, and as cellular coverage becomes more and more reliable and wide-spread, many companies find that cellular connectivity is more than adequate. Keep in mind, that even when out of cellular coverage, the system in the vehicle still remains up-to-date for driver ELD purposes.

Many ELD providers are quick to offer their software solutions, but distance themselves from also providing the hardware to operate it. While they offer hardware compatibility suggestions, they just aren't prepared to offer the complete package.

Some, of course, do offer turn-key solutions...particularly the big players who often have custom-matched hardware. These can be extremely well-developed and comprehensive solutions that are both stable and continue to have progressive development. Just watch your wallet – these solutions, and their recurring fees, can creep.

In my experience, do your research here. Find an ELD provider who can also provide costeffective hardware matched to their solution and meeting all pending regulations. Compatibility of components and software are key to a good ELD experience. Effective solutions can be relatively simple (and inexpensive) from a hardware standpoint – many use common android or Apple tablets connected to a "dongle" which ties the tablet and ELD to your truck ECM through your J1939 connection (the same connection your local dealer uses to read your engine fault codes). ECM connectivity will be an absolute requirement to meet pending regulation, but this needn't cost thousands per truck to acquire.

## **Installation and Support**

Installation costs are an often-over-looked expense that trucking companies should consider and negotiate into any agreement for an ELD solution. Of course, this will only be possible if the solution you choose is from a provider that can offer both the software and hardware – a turn-key solution. Solutions that include a tablet, mount and ECM dongle will often be able to be completed in under 2 hours. Complex systems using proprietary hardware and satellite systems could be much more involved...and costly.

As with any purchase that you will have daily reliance on for your business, after sales support is crucial to a successful ELD experience. Problems with something that will become as missioncritical as your driver's daily log book, could be more than just a headache. As we all know, CVSE officers don't have a lot of patience for drivers and companies who are not in compliance...at all times. ELD suppliers need to have a strong culture of customer support and the availability to provide quick responses to customer issues. Support costs can range widely...but should not be a significant additional cost from regular monthly costs.

# **Product and Development**

If there was one suggestion that was more important than any other, it would be to ensure that any system you choose is easy to use for your drivers. Driver acceptance in the early days of implementation will be crucial to having an enjoyable (okay acceptable) ELD experience. These systems need not be complicated to use. Modern ELD systems are intuitive and require minimal driver interaction. For instance, any system you choose should not require a driver to put him or herself in the "Driving" duty-status...the system should automatically do that once the gps embedded in the hardware recognizes that the truck is moving at a minimum speed for a minimum length of time.

Continuing development is important in terms of telematics capabilities, but over-complicating the driver's daily log (ELOG) component is probably not going to be a big requirement if they got it right the first time. In this case, the KISS (keep it simple stupid) principle definitely applies...no need to make your professional driver's job more difficult by complicating the log book use.

Now enhancing telematics capabilities on an ongoing basis is a different matter. This will be discussed more in a later section.

#### Part 4 - Steps to ELD Implementation

This process will take longer than you think...start now. So, you've assessed your business' ability to comply with hours of service regulations and made operational changes to ensure you can, you've made decision about what type of solution is right for you (ELD vs ELD/EOBR), and researched and selected a software and hardware provider, the next step is to prepare your company to implement.

#### **Include Your Drivers Early in the Process**

As has been eluded to earlier, the buy-in of your drivers and how you go about transitioning to an ELD world is crucial. Look, most of the industry is already grappling with a driver shortage the last thing any of us want to do is make that worse by implementing something that your drivers won't accept. Having an informational meeting with your drivers early on (before the ELD shows up in their truck), is a good...no, imperative, first step.

Put yourself in your drivers' shoes. So far, they are basing everything they know about ELDs on, in many cases, what they've heard from other drivers on the two-way radio. Not always the best source of information. That said, take comfort in knowing that you are now far from the first company to implement ELDs, many have been voluntarily running them for a few years now. In my experience, most drivers who have made an early transition to ELOGs would never go back to paper, so some of what your drivers are hearing on the road might actually be very positive.

Mostly, drivers are concerned about how these devices will impact their lives. We have an aging demographic and many of our older drivers are simply scared of change, particularly when that change includes technology - something they are often already very uncomfortable with. This goes back to the importance of simplicity when it comes to the ELOG component of your system. The simpler it is to operate, the larger the buttons are to see, the more intuitive the system is in either filling out a lot of the information, or how well it "guides" the driver through the steps to get through his day, the more readily your drivers will accept and transition.

#### Find an Internal Champion or Two and Transition Slowly

Okay, your opportunity to transition slowly is slipping away as regulation gets closer...but do your best here. Most of us have a couple of drivers who are technology savvy and just have to have the latest gadgets (pick the one who stands in line at Best Buy for the latest iPhone release!). Meet with them separately and solicit their help in getting this implemented in your business...because you know they are the one who can "lead" this roll out.

Work very closely with them in the early days both before and after system install to see how they are doing with the system and help them solve any problems early. Make sure you have supplier support here to be ready and available to assist in working through the challenges that will inevitably come up. (Yes, I guess I said it, you are going to encounter some challenges early on - but you will get past them).

One thing that was very helpful for us was involving the local CVSE regional manager in our decision to transition to ELD's. We kept him apprised of what we were doing and we asked him for a "transition period", whereby we would have our drivers train on the ELD system but continue to use their manual paper logbook as their official logbook. Our CSVE manager

provided us with a letter to carry in each of the trucks authorizing this so as to avoid anyone charging us with running 2 logbooks during this training period. This way, our early days of ELD use were much less stressful for our drivers knowing that any issues they encountered, or mistakes that they made, would not be held against them by CVSE.

Once your champion drivers are comfortable with the system (and hopefully talking it up on the radio), include them in group driver training sessions to begin transitioning your larger driver pool. Make sure that your ELD provider has the capability and resources to provide classroom-style training at your facility, with a demonstration system that can emulate what the drivers will see in their trucks. Oh, and make sure you have included this driver training in your agreement with your chosen supplier, otherwise, cha-ching!

Be sure to include key operational people in all of the training that the drivers are experiencing. Soon they will be the ones fielding the, hopefully infrequent, calls from drivers needing help with the system. As well, these operational people will need additional training to know how to use the back-office aspects of the software (setting up new power units and trailers, adding employees and assigning user id's and rights, pulling information from the system for ELOGs, as well as telematics data if you choose that capability).

Maybe most importantly, have patience. In our experience the technology is best used as a learning tool to allow your company and your drivers to improve, not as a stick to easily identify all of their shortcomings.

## Part 5 - Harnessing the Power of an ELD/Telematics System

There are some key features that, in our experience, are must-haves when it comes to an ELD solution:

#### **Exception Reporting**

Eluded to in an earlier section, one of the great advantages from a management perspective with electronics, is the ability for the system to weed out the data that needs no attention from the data that needs your attention. With ELOGs, the only logbooks that are critically important are the ones that don't comply with hours of service regulations. A good ELOG software package will bring those logbooks to your attention so that you don't have to seek them out. This is a huge management time-saver.

#### **Pre/Post Trip Inspections**

Strong ELOG solutions incorporate a robust pre/post trip reporting capability with the software. Remember, our goal is do away with the paper logbook, and anything that goes along with it, including the vehicle inspection reports. They really go hand-in-hand, and your ELOG system should allow your drivers to complete their daily vehicle inspections online, within the system. Once again, units that are inspected that have defects, should be easily identified by the system, without your maintenance department having to look hard to find them.

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#### **Hours of Service Reporting**

Your ELOG system needs to have an easy way for both management and your drivers to access previous days' log books, both for personal use and for providing to CVSE if required. Understanding for how long your ELOG provider stores this information is important, both practically and legally. Logbooks must be maintained for viewing for 6 months for CVSE purposes. If you use logbooks as a means for calculating payroll, they may be needed for 7 years.

#### **Storage of Personal Information**

Knowing where the personal information for your business and, most importantly, for your drivers, is very important. Do your homework here, but you may be contravening your employee's personal information rights if their ELD information is stored outside of Canada.

**Fleet Tracking and Two-Way Communication** - okay, we're straddling the fence here on whether this is an ELD solution or an EOBR solution. Regardless, if you are only opting for an ELD solution, having the capability to track your vehicles on a map in your back-office, and having two-way communication via text from the office to your drivers and back through your onboard system is a huge asset. Try to ensure this is an included feature on any system you purchase.

Fleet-Tracking Example:



Two-Way Communication Example:



## **Logbook Editing**

ELD systems must still include the ability for the driver to edit his logbook if a mistake is made. There are very specific requirements about how an electronic logbook can be edited and what can be edited (for instance, it is believed that the final ruling will not allow for the editing of On Duty, Driving time). Compliant ELD systems must have an audit trail built in to them to highlight anything within a logbook that has been edited, and by whom. For example, early in our implementation we regularly had drivers forget to Log Off at the end of their shift, leaving themselves On-Duty, Not Driving for their entire off-duty time while they were at home. An inability to edit the logbook would have meant they couldn't go to work the next day.

## Part 6 - Telematics Features and Capabilities

So, you've made the decision to go with a full-feature ELD/EOBR system and want to extract all of the telematics information available to help streamline your operations. Below are some of the features and capabilities that we've seen, used and highly recommend.

#### **Driver Scorecard**

One of the great features of modern day EOBR systems is the ability to set parameters around how you want your trucks operated, and provide regular and ongoing feedback to your drivers. Once again, it's all in the approach. The minute drivers feel like these systems are being used as a stick over them, all is probably lost. Your drivers will feel suspicious and it may not be long before they are looking for another driving opportunity with someone else - and there are plenty of them out there.



Things you might consider setting targets around include: speed, idle time, harsh braking, target rpm under braking and under power. A driver scorecard can be created to provide points throughout your drivers' day for staying within your parameters, and have points deducted for straying outside of those parameters. At the end of the day, the driver (and company) can receive a report showing his performance for the day.

If you take this from the approach of a learning tool, and your targets as goals for your drivers to reach for, it should be well-received by your driving team. Tying this to an incentive program for safety and efficiency is the next step at sharing the savings with your driving team.

#### **Fuel Usage**

Obviously one of the most significant costs in a trucking business is fuel. EOBR's provide an easy way to monitor, compare and report out on fleet and individual unit and driver fuel usage. Tying the monitoring of fuel usage with establishing speed targets, idle time targets and driver

scorecards can be a very powerful tool in moving your company to meaningful fuel savings. As well, reporting on fuel usage within different jurisdictions will make IFTA tax claims that much easier to submit.

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# **Idle Time Monitoring**

Similar to fuel usage, fleet and individual unit idle time is easily monitored through telematics. Creating fleet and individual trip targets for idle time is a great way to: reduce fuel consumption and cost, minimize the maintenance costs which are inevitable to rise with high idling - particularly with current aftertreatment systems - all while helping the environment.

# **Cycle Time Calculating**

Advanced telematics systems have the ability to extract data on cycle times for individual hauls. Depending on the complexity of your operation, some systems can automatically calculate cycles (for repeat and routine routes), or allow you to "build" cycle routes by stringing together geozones (see below).

# **Geo-Fencing**

Geo-fencing allows you to essentially put a box around a particular segment of your route, or your entire route, name it and then put particular criteria within that "geo-zone". For instance, maybe you have a particularly dangerous corner along your route that is the scene of many accidents and you want your equipment travelling 40 km/hr around that corner. You can geo-fence that corner along your route, and set your maximum speed at 40 km/hr...even if the actual legal speed limit is 60 km/hr. Driver's will be cautioned if their speed is above 40, as will the company depending on the settings you choose.



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This type of tool can be used also to identify school zones or other high-risk areas. You might also use it to geo-fence a customer's property which will allow you to later pull reports on how long your equipment is at a customer site being loaded or unloaded - a great way to have the data you need to support rate negotiations, or, even better, support customer conversations to improve the service for your drivers and company while on their site.

#### **Speed Monitoring**

Once again, depending on the system you choose, different telematics systems have different capabilities. Some may only allow you to choose a "Company maximum speed", whereby it only reports out speeds in excess of that single maximum speed limit. Of course, if your company

maximum speed is 100 km/hr, this does not mean your trucks won't be speeding in sections where the speed limit is, say, 80 km/hr.

More advanced systems have the capability of recognizing the speed limits on all major road systems. These systems will allow you to set a tolerance on the legal speed limit, and then report out any violations at any speed beyond the tolerance you have set.

## Messaging

As mentioned earlier, two-way messaging between your home office and trucks is a great tool to have. Particularly in a day and age where distracted driving is such a concern, allowing drivers to put away their phones and receive messages through their onboard system whenever they are at the next safe place to view them, can improve safety, reduce the impulse for drivers to talk or text while driving (telematics systems should prevent driver input while the vehicle is in motion), and improve operational efficiencies in dispatching equipment.

#### Fleet Tracking

A tool that should be included in all telematics systems (and often in your base ELD system), is fleet tracking. Simply put, this is the ability to view all of your equipment, real-time, on your computer screen, over-laid on a map. Hovering over each unit will often provide additional information, like whether the truck is empty or loaded, current speed, truck and trailer #'s, and the driver's name and duty status.

This can be a great for providing customer's with accurate information on arrival times, etc., without ever needing to contact your driver.



Certainly, this is not an exhaustive list of features available with a telematics system – but it does represent ones we think you should consider looking for in any package. Other options like engine fault code reporting through your telematics, breadcrumb tracking and reporting, etc., etc., are all available depending on your choice of system. The world is your oyster!

#### Summary

The road to ELOG/ELD/telematics implementation will not be one without its challenges, but the rewards will quickly outweigh the costs. The sooner you get started, the more smoothly the transition will go, and the more time you will have to onboard your staff in a positive way.

Best of luck as you pick your path to ELD and telematics implementation.

Our journey to implement electronic logbooks in all our trucks was not without its ups and downs. Certainly, the most challenging part was getting all our drivers to embrace and use the new technology.

If you want to have a chat sometime about how we went about getting buy in from our drivers, choosing a technology or supplier, or the our operational experience with ELD's, feel free to give me a call at 250.828.2821 or drop me an email <u>gmunden@mundentrucking.ca</u>.

All the best, Greg Munden

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