FLEET MANAGEMENT

Managing a fleet of vehicles requires an organization to achieve control over an inconsistent environment to keep vehicles and their operators performing at their peak. It requires a careful eye to maximize productivity while minimizing costs and ensuring compliance with government regulations.

This section contains solutions for increasing visibility into fleet operations to drive down costs and ensure consistency across departments and locations.

Avis Fleet Services 166
United Road Towing Arizona 172

AVIS FLEET SERVICES

Industry: Commercial
Number of employees: 1,000- 5,000
Headquarters: Johannesburg, South Africa
Existing Laserfiche integrations: Planet Press Suite, ScannerVision to Laserfiche Connector, AS400, Oracle Accounting System

Avis Fleet Services provides specialized solutions to more than 2,000 customers in the country's private and public sectors. The company manages a fleet of more than 200,000 vehicles from its headquarters in Johannesburg, South Africa, includes seven field offices and provides services in six neighboring countries.

Avis Fleet Services provides an integrated motor vehicle usage solution to fulfill customers' specific needs.

Here is how the company uses Laserfiche integrated with multiple systems to manage the various traffic fines and accidents accrued by drivers of its fleet.

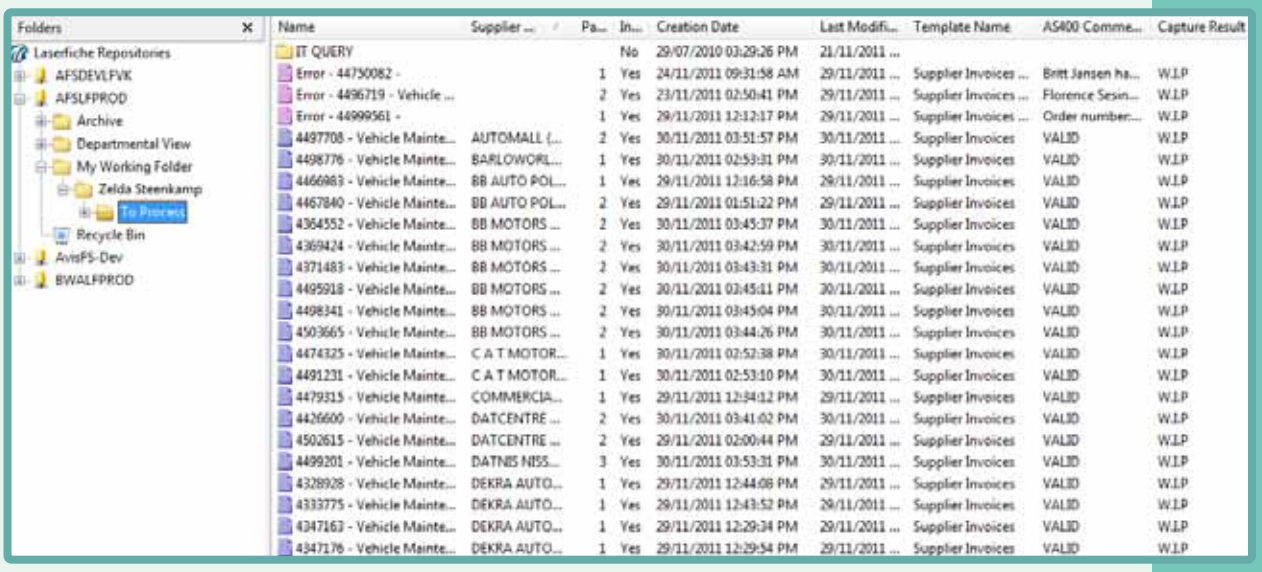
Vincent Kelly, Analyst Programmer, demonstrates how Avis Fleet Services manages traffic fines and accidents with Laserfiche.

CAPTURE

Traffic fines and accident reports are captured in Laserfiche using one of two methods:

- Laserfiche Snapshot.
- Scanner Vision integrated with Laserfiche using Lf -Link.

Once these documents are captured, Laserfiche Workflow automatically routes them to the relevant employee's working folder in the repository.



- The employee opens a document in Laserfiche and creates a new incident by entering certain information, such as the Traffic Fine Number, the Vehicle Registration and the Document Type into the Fleet Management System (FMS). The FMS is where all our customer and supplier data is kept. Since the traffic fines are not in a uniform document format, we haven't been able to automate this part of the process yet.
- Once the employee updates the Fines Result field in the document's template, a workflow that validates the data between Laserfiche and the FMS is invoked.

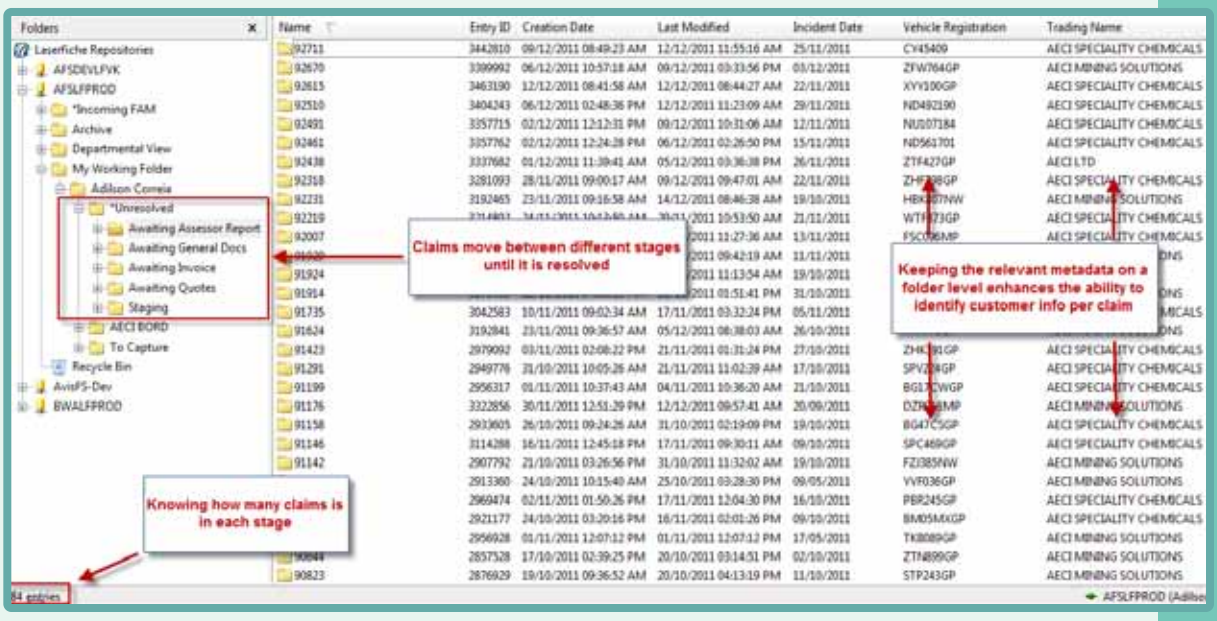
- From there, the document will be routed to the "Unresolved" folder, where it waits for further processing.
- At this time an e-mail is sent to the customer notifying him of a new traffic fine in our database. In addition to the Traffic Fine Number and Registration Number, the e-mail includes a copy of the actual traffic fine as an attachment for the customer to view and verify. We also provide him with a link to our online customer portal.
- Once logged into the portal, the customer can go to the "Traffic Fine Management" option and perform a search by the Registration Number provided in the e-mail. Clicking on any of the documents that have been returned in the search extracts the document from the Laserfiche repository and converts it to a PDF using a custom plug-in.
- Once the customer views the fine and is satisfied that the information is correct, he can either notify us to pay his fine or ask that the fine be redirected to another driver.

FLEET ACCIDENT MANAGEMENT

In addition to managing the process of traffic fines and citations, we also deal with the insurance companies if a customer is involved in an accident. Laserfiche Workflow routes the claim documents through each of the various stages in the fleet accident management process until the claim is resolved. At each stage in the workflow, the claim moves to a different folder in the Laserfiche repository.

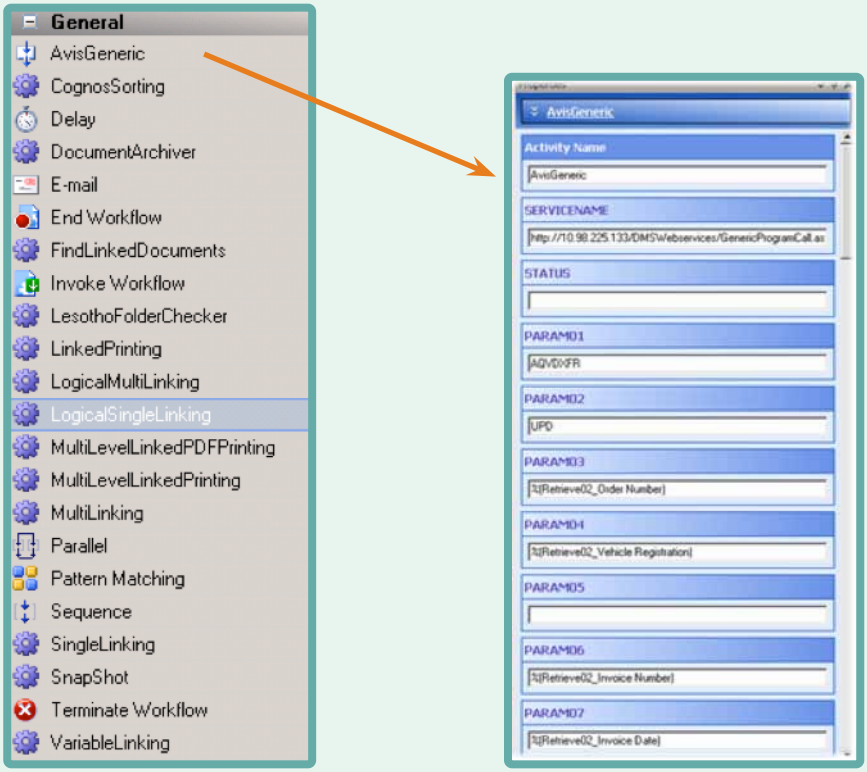
- Awaiting Assessor Report
- Awaiting General Documents
- Awaiting Invoice
- Awaiting Quotes
- Staging

While in each folder, the claim awaits any supplemental documents, such as the invoice while in the "Awaiting Invoice" folder and the quotes while in the "Awaiting Quotes" folder. The Clerk monitors each folder, and once each supplemental piece of information is received, he selects the next step in the claim's template field. Workflow then routes this claim and supplemental documents to the next folder in the repository.



CUSTOM ACTIVITIES

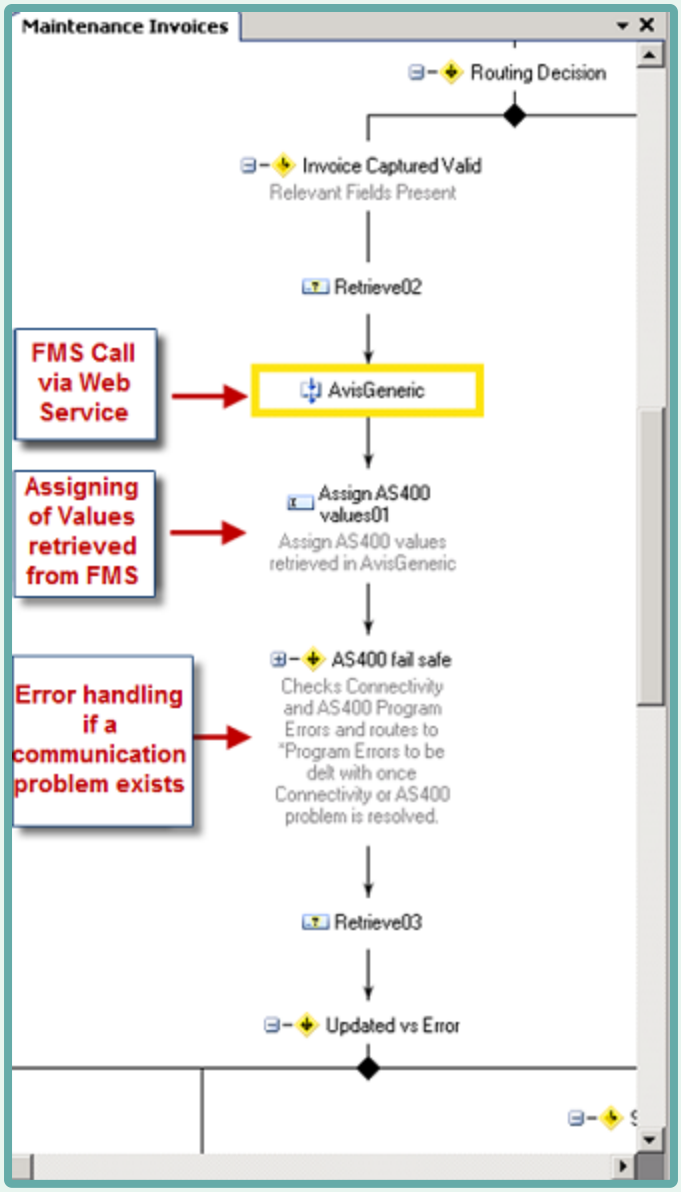
In order to facilitate our business processes, we have created a large number of custom Workflow activities. Of those activities, the most important is AvisGeneric, which updates the information in Laserfiche from the FMS:



We basically call a Web Service by a specific path and pass the parameters into the FMS via the Web Service:

- Order Number
- Vehicle Registration
- Invoice Number
- Invoice Date

The data is then validated based on information contained in the FMS system and the relevant information is passed back via the Web Service to populate the document's template fields. Here is how this activity fits into a workflow:



SUMMARY OF BENEFITS FOR AVIS FLEET SERVICES

Implementing Laserfiche in our Traffic Fine and Accident Management processes resulted in the following benefits:

- Improved disaster recovery and business continuity. When our warehouse burned down we couldn't recover from loss of all the paper documents that were stored there. Now we have backup servers offsite and can easily recover from any disaster.
- With Laserfiche Audit Trail, we can easily trace any problem with a document to a specific time and user. This helps us resolve issues quickly.

UNITED ROAD TOWING ARIZONA

Industry: Commercial
Number of employees: 1,000- 5,000
Headquarters: Phoenix, AZ
Existing Laserfiche integrations: Towing software

The Arizona branch of United Road Towing performs more than 7,200 tows monthly. A fleet of over 100 service trucks provides 24/7 emergency road service every day of the year.

The company implemented Laserfiche to ensure consistent processes between different staff groups and eliminate reporting late fees.

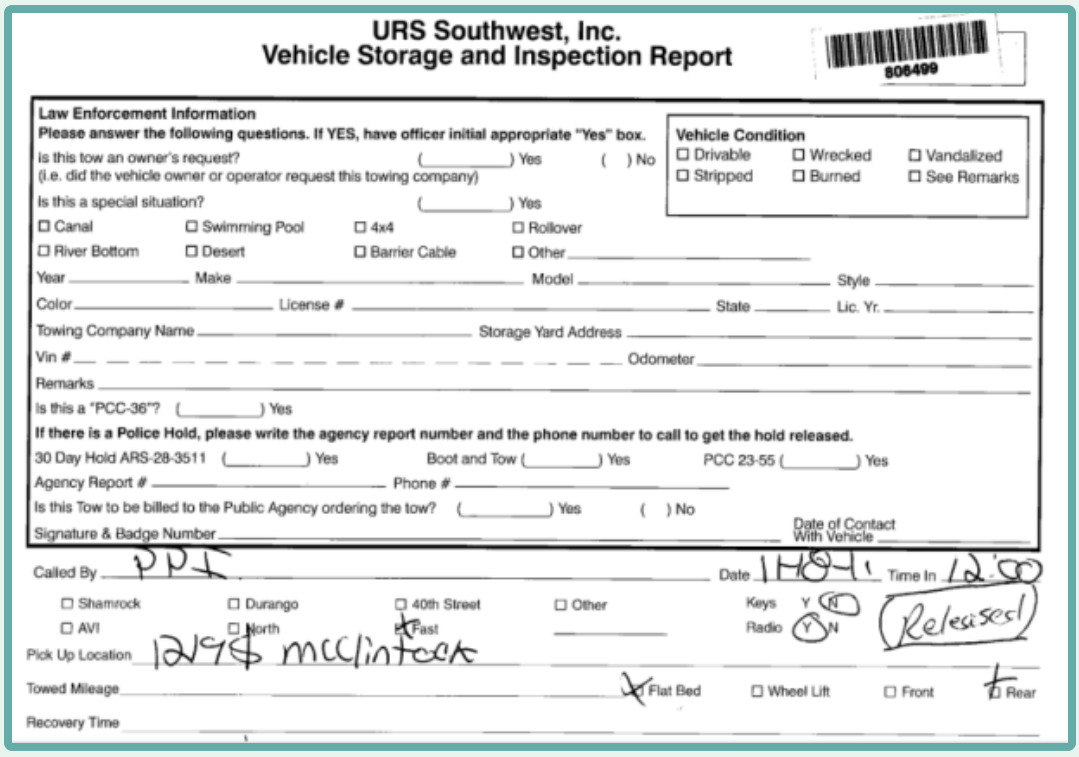
United Road Towing built a custom integration between Laserfiche Quick Fields, Laserfiche Workflow and towing software that gathers data from scanned vehicle barcodes, driver invoices and customer-submitted documents. The integration makes previously disconnected information readily available to multiple departments and provides in-depth documentation on the towing process.

United Road Towing delivers Workflow templates, code and tips for custom integrations.

> *"Laserfiche has helped us to streamline our processes but also makes sure that the processes are the same from location to location."*
>
> *— Sheila Gallegos, Project Manager.*

The company worked with Laserfiche to create a custom Workflow script with an HTTP post to retrieve data from the towing software's closed database. The script automatically pulls information from the towing software to fill in additional data in Quick Fields about the document after the barcodes are scanned:

- When the company tows a vehicle, the tow truck driver places a bar code sticker on the vehicle to identify it in the vehicle inventory and places a barcode on the storage report:



URS Southwest, Inc.
Vehicle Storage and Inspection Report

806499

Law Enforcement Information
Please answer the following questions. If YES, have officer initial appropriate "Yes" box.

Is this tow an owner's request? (_____) Yes ( ) No
(i.e. did the vehicle owner or operator request this towing company)

Is this a special situation? (_____) Yes

☐ Canal ☐ Swimming Pool ☐ 4x4 ☐ Rollover
☐ River Bottom ☐ Desert ☐ Barrier Cable ☐ Other _____

Vehicle Condition
☐ Drivable ☐ Wrecked ☐ Vandalized
☐ Stripped ☐ Burned ☐ See Remarks

Year _____ Make _____ Model _____ Style _____
Color _____ License # _____ State _____ Lic. Yr. _____
Towing Company Name _____ Storage Yard Address _____
Vin # _____ Odometer _____
Remarks _____
Is this a "PCC-36"? (_____) Yes

If there is a Police Hold, please write the agency report number and the phone number to call to get the hold released.

30 Day Hold ARS-28-3511 (_____) Yes Boot and Tow (_____) Yes PCC 23-55 (_____) Yes
Agency Report # _____ Phone # _____
Is this Tow to be billed to the Public Agency ordering the tow? (_____) Yes ( ) No
Signature & Badge Number _____ Date of Contact With Vehicle _____

Called By PPT Date 1/10/11 Time In 12:00

☐ Shamrock ☐ Durango ☐ 40th Street ☐ Other Keys Y N
☐ AVI ☐ North ☒ East _____ Radio Y N

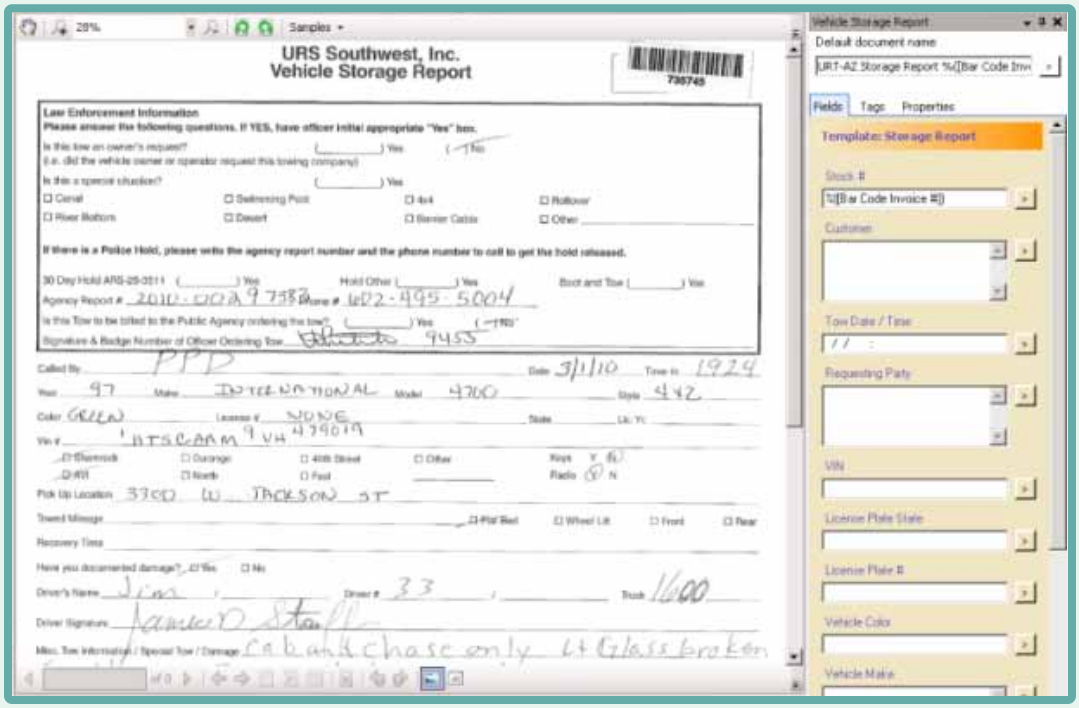
Released

Pick Up Location 1295 McClintock

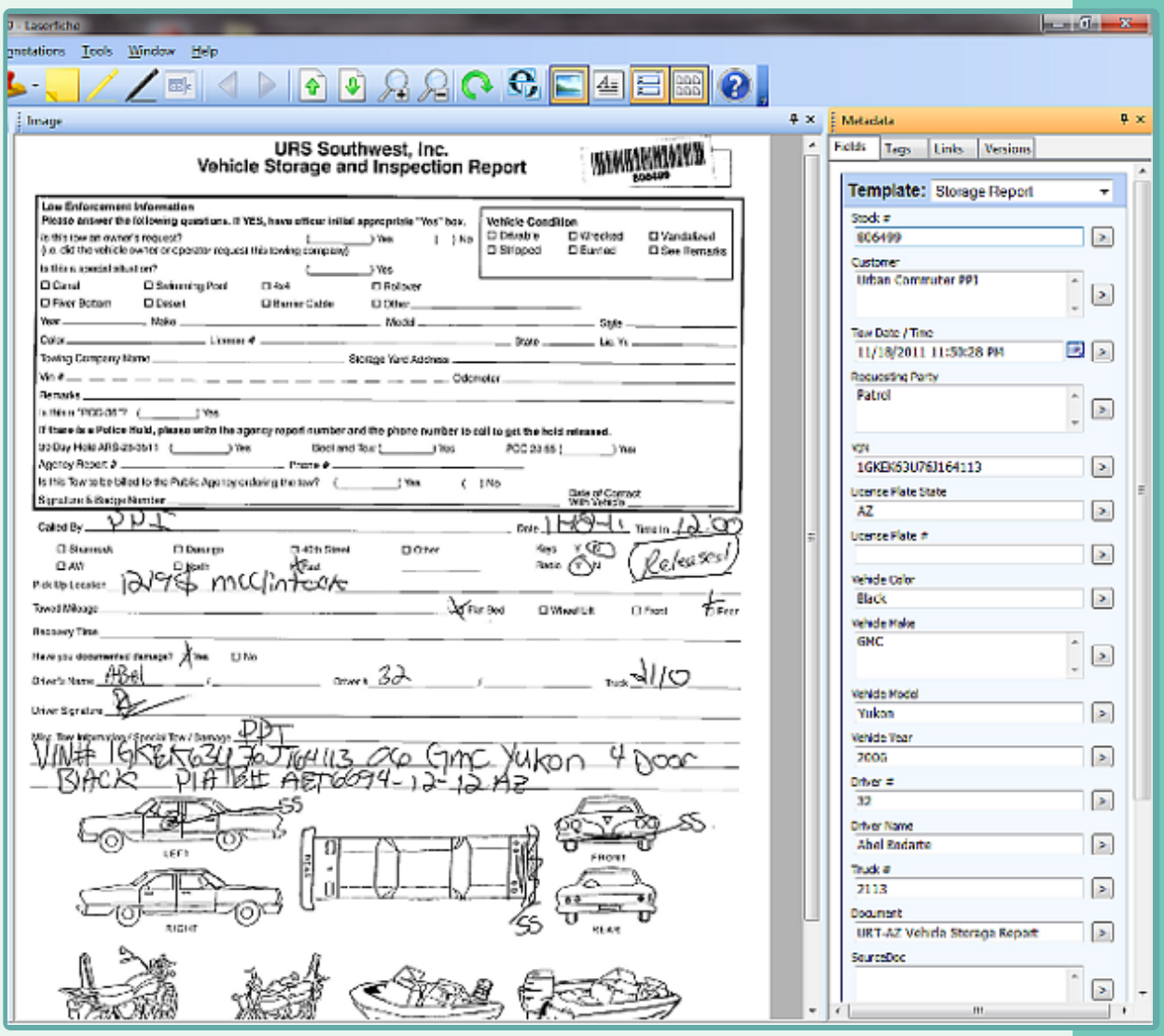
Towed Mileage _____ ☒ Flat Bed ☐ Wheel Lift ☐ Front ☐ Rear

Recovery Time _____

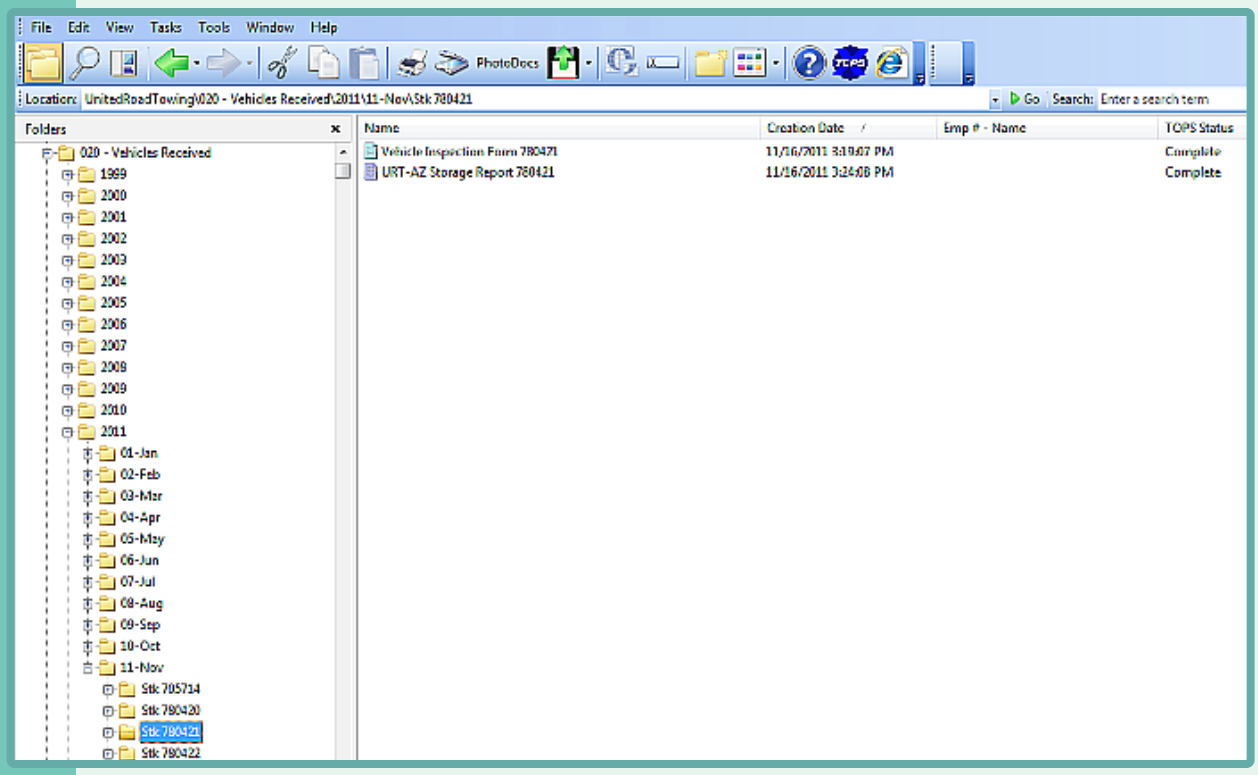
- Storage facility staff scans the storage report with the barcode into Laserfiche.
- Quick Fields reads the barcode, places the inventory number into a field and saves the storage report into the Laserfiche repository:



- The custom Workflow script runs a session that searches the towing database using the barcode and fills in additional sections in Quick Fields with retrieved information about the vehicle, such as the vehicle's make, model, year, VIN as well as customer information, invoice and payment dates:



- When all fields are complete, the Workflow session electronically files the documents by tow date:



"Now anyone who answers the phone can answer inquiries about the status of a vehicle by doing a simple search in Laserfiche."

— Sheila Gallegos, Project Manager.

TIPS AND LESSONS LEARNED

- Involve everyone who touches the documents to be sure that you don't miss something critical to the department. Find out what is important to them.
- Add quality checks to the system for those odd situations that might need to be processed differently.
- Document the current business processes and determine where Laserfiche can create efficiencies. Then set measurable and realistic goals as to when the efficiencies can be implemented.
- Think outside of the box.