

# Fleet Operator Recognition Scheme

## FORS Overseer Dashboard

## Contents

Overview .....	3
Getting started for FORS Champions and local authorities .....	4
Creating/updating regions.....	4
Creating/updating contracts.....	5
Viewing the list for FORS Champions, local authorities and MOCAs .....	7
Viewing the map .....	8

## Overview

The FORS Overseer Dashboard has been designed for organisations that oversee a FORS supply chain or a local region, as well as for those who manage a number of FORS accredited operating centres (OCs). Organisations that will benefit from the FORS Overseer dashboard include FORS Champions, local authorities and Multi-Operating Centre Accredited organisations (MOCAs).

The dashboard comes with numerous features to make it easier to find, monitor and contact FORS organisations using three distinct approaches:

- By regions via the registered postcode – good for spatial searches
- By contracts via the FORS ID or organisation name – good for known supply chains
- By FORS accredited operating centres through your MOCA account

Using this dashboard is easy, and features include:

- Seeing who is operating in given postcode regions that you can select
- Viewing and exporting lists of FORS operators in your supply chain
- Monitoring operators' FORS status and upcoming expiry dates
- Requesting a call-back from an operator
- Sending an email to the FORS compliance team about a specific operator

The dashboard displays the search results in a map and table format, indicating days to expiry of an operator's current level of FORS accreditation (ie Bronze, Silver or Gold) making it easy to manage checks of operator's accreditations. Further details on the operator can be viewed by clicking on their entry.

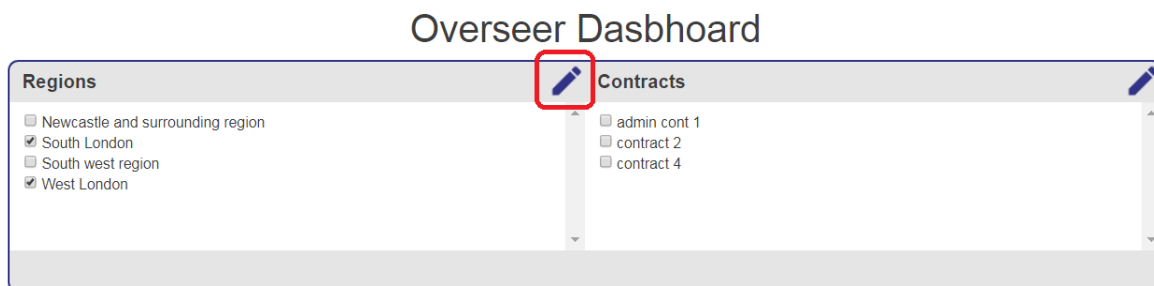
## Getting started for FORS Champions and local authorities

If you have a MOCA account, then you can skip this section as your operating centres are selected by default and will appear on the FORS Overseer dashboard. Go to, jump to 'Viewing the list' section.

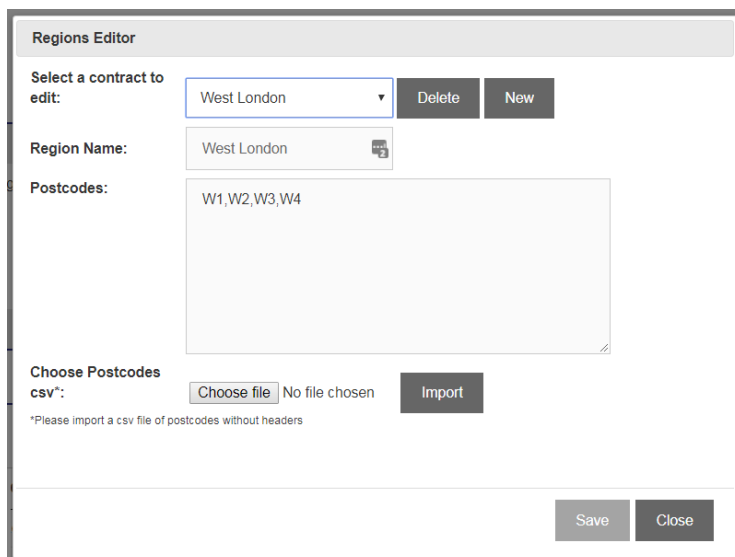
## Creating/updating regions

Regions make it possible to identify groups of operators via their registered postcode; this is good for spatial searches.

To add or edit a region, click the pencil icon highlighted in the image below.



The region editor will be displayed:



The image shows a screenshot of the 'Regions Editor' form. The form has a title bar 'Regions Editor'. Below the title bar, there is a section 'Select a contract to edit:' with a dropdown menu showing 'West London' and two buttons: 'Delete' and 'New'. Below this, there is a 'Region Name:' field with a text input containing 'West London' and a small icon. Below that, there is a 'Postcodes:' field with a text area containing 'W1,W2,W3,W4'. Below the text area, there is a 'Choose Postcodes csv\*' section with a 'Choose file' button, a 'No file chosen' label, and an 'Import' button. Below this, there is a small note: '\*Please import a csv file of postcodes without headers'. At the bottom right of the form, there are two buttons: 'Save' and 'Close'.

### To add a new region:

- 1) If you've been using this pop-up already, then click the 'new' button. If not skip this step.
- 2) Enter a 'region name'
- 3) Either:
  - a) Type in one or more postcode parts (eg "W1" or "B48"), these should be comma separated
  - b) Use the 'Choose file' button to select a file (\*.csv or \*.txt) containing the comma separated postcode parts and press the 'Import' button
- 4) Click the 'Save' button
- 5) Correct any validation errors and re-save
- 6) To add a second region, repeat from Step 1

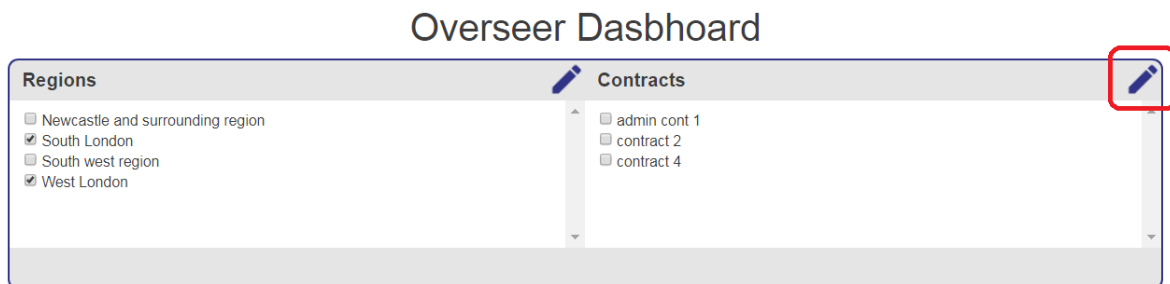
### To Edit a region:

- 1) Select the region in the first drop down list
- 2) Modify the 'Region name' if required
- 3) Modify the postcode parts if required
- 4) Click the 'Save' button
- 5) Correct any validation errors and re-save
- 6) To edit another region, repeat from step 1

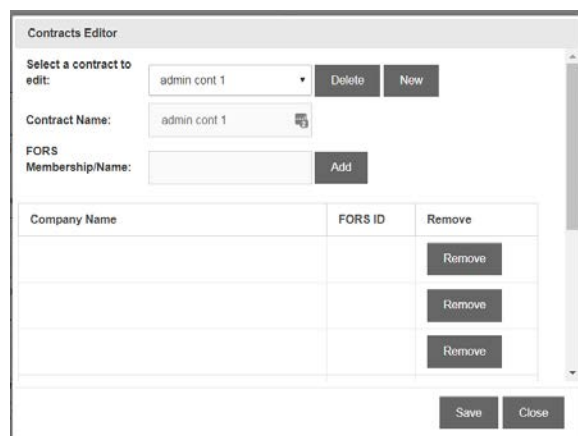
## Creating/updating contracts

Contracts make it possible to identify groups of operators via their FORS ID/name. This is good for known supply chains.

To add or edit a contract, click the pencil icon highlighted in the image below.



The contract editor will be displayed:



The 'Contracts Editor' form is shown. It includes a dropdown menu to 'Select a contract to edit:' with 'admin cont 1' selected, and buttons for 'Delete' and 'New'. Below this is a 'Contract Name:' field with 'admin cont 1' and a file upload icon. There is also a 'FORS Membership/Name:' field with an 'Add' button. A table with columns 'Company Name', 'FORS ID', and 'Remove' is present, with three rows, each having a 'Remove' button. At the bottom right, there are 'Save' and 'Close' buttons.

### **To add a new contract:**

- 1) If you've been using this pop-up already, then click the 'new' button. If not skip this step.
- 2) Enter a 'contract name'
- 3) Use one or both approaches:
  - a) Type in the start of a FORS ID or name. After a few characters, a short list will appear. Click the correct entry to use it, then click the 'Add' button.
  - b) Use the 'Choose file' button to select a file (\*.csv or \*.txt) containing the comma separated FORS IDs (not names) and press the 'Import' button. Note any exceptions
- 4) Click the 'Save' button
- 5) Correct any validation errors and re-save
- 6) To add a second contract, repeat from step 1

### **To Edit a contract:**

- 1) Select the contract in the first drop down list
- 2) Modify the 'Contract name' if required
- 3) Add or remove organisations as required
- 4) Click the 'save' button
- 5) Correct any validation errors and re-save
- 6) To edit another contract, repeat from step 1

## Viewing the list for FORS Champions, local authorities and MOCA's

Select one or more regions and contracts to display the resulting organisations' data in the list. If you have a MOCA account then your operating centres will already be included.

### Overseer Dashboard

**Regions**

- Newcastle and surrounding region
- South London
- South west region
- West London

**Contracts**

- admin cont 1
- contract 2
- contract 4

The list will update to list the organisation IDs/names:

List Map
Search:

[Export to CSV](#)

FORS ID	Company Name	Level	Status	Days to Expiry	Postcode
Number	Name	Registered	Active	74	NW1 0BY
		Registered	Active	28	S3 9QY
		Registered	Active	61	W4 5YF
		Bronze	Active	295	W3 0TJ
		Bronze	Active	113	NW1 2RS
		Bronze	Active	45	S2 3AU
		Bronze	Active	266	W3 8DH
		Associate	Active	N/A	S4 7UR
		Bronze	Active	7	S3 9SR
		Bronze	Active	127	NW1 3ER

FORS ID
Company Name
All ▼
All ▼
Days to Expiry
Postcode

Showing 1 to 10 of 68 entries Previous 1 2 3 4 5 6 7 Next

Key data in this list includes the organisations current:

- Level eg registered/Bronze/Silver/Gold – filterable
- Status eg Active/dormant etc – filterable
- Days to expiry – this is the number of days until the current level expires and therefore not necessarily a countdown to the Bronze expiry
- Postcode – when displaying just regions this should match the postcode parts selected

Key features of this list:

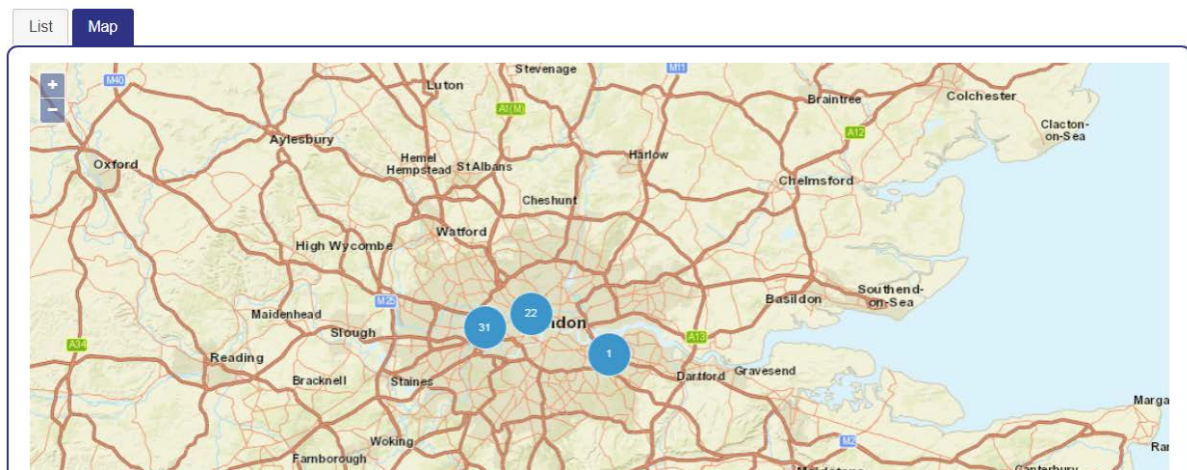
- Filtering: the dropdown selectors in the footer can be used to filter the lists content eg to show only Gold members
- Sorting: clicking the headers sorts and re-orders the data
- Paging: where lots of data exists you may navigate through it using pages (bottom right)
- Searching: use the text box (top right) to filter the list contents using a search term. This can be applied to the FORS ID/name or any other content



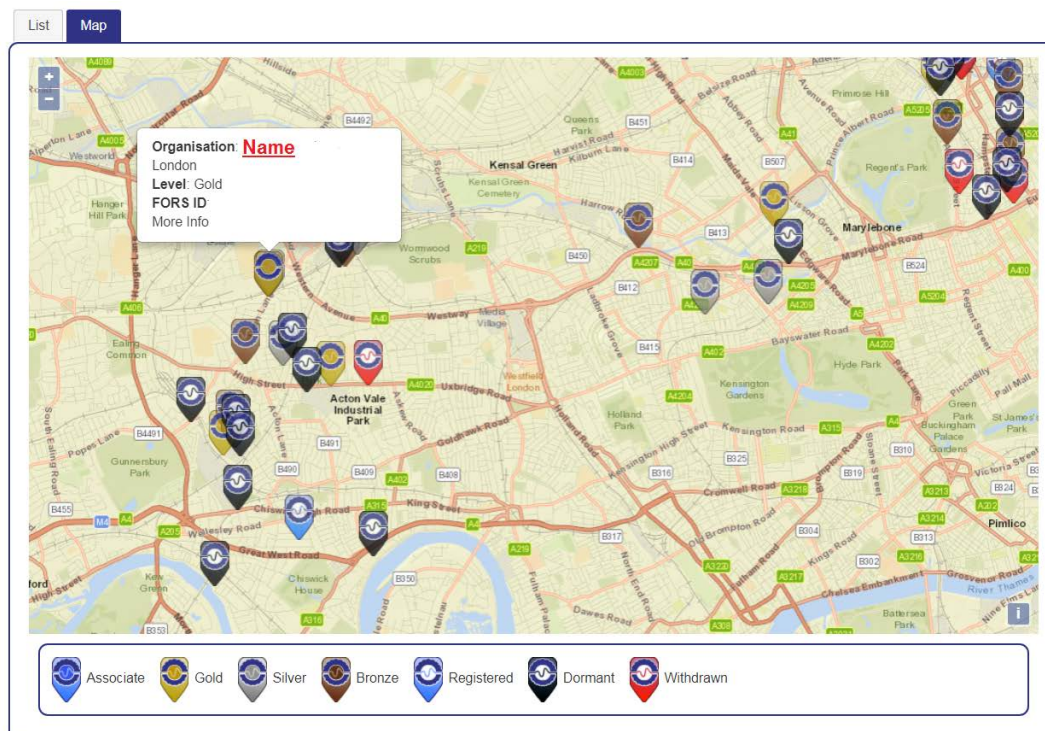
Finally clicking on the organisation name will display a pop-up, described below.

## Viewing the map

The contents of the list are also drawn on a map (accessible via the tab control). The default is to show organisations clustered together, the number indicates the count.



Zooming in (using + button or the scroll wheel on a mouse) will display individual organisations as icons. Clicking an icon will display a balloon with the organisation name and a link to display the pop-up described in the next section:





## Using the pop-up

Clicking the organisation name in the list view or map balloon will display the following pop-up:

**Company Details**

FORS ID:	<input type="text" value="Number"/>	City:	<input type="text" value="London"/>
Company Name:	<input type="text" value="Name"/>	Number of Vehicles:	<input type="text" value="2"/>
Status:	<input type="text" value="Active"/>	Last audit date:	<input type="text" value="Not booked"/>
		Last audit Result:	<input type="text" value="Approved"/>

You may request this operator contacts your organisation using the controls below. Their primary account holder will be emailed your primary account holders details as well as a the phone number entered. The reason will help them identify what topic you'd like to discuss:

Contact reason:	<input type="text" value="Select"/>	Telephone:	<input type="text"/>	<input type="button" value="Contact"/>
-----------------	-------------------------------------	------------	----------------------	--

[Report Non-Compliance to FORS](#)

The pop-up display a little more information about the organisation, the ability to request a call-back and a link to help report non-compliance issues.

The call-back requires you to specify a reason and provide a phone number. FORS will email the organisation on your behalf.