

# FORS Fleet Tools user guide

FORS Fleet Tools

# Contents

1	FORS Fleet Tools Overview	1
2	Registering to access FORS Fleet Tools	2
3	Using the Toolkits	4
4	Company info	5
5	Vehicle Data	6
6	Vehicle Safety Equipment	7
7	Driver Data	8
8	Fuel use tracker	9
9	Summary report	10
10	Incident Data entry	10
11	Incident Tracker	11
12	PCN Data entry	12
13	PCN Tracker	13
14	Submitting Silver or Gold evidence into FORS evidencing systeme	13
15	Import existing data	17



# 1 FORS Fleet Tools Overview

FORS Fleet Tools provide a hassle-free, consistent and reliable platform to support you in demonstrating how you meet specific safety and efficiency requirements as you progress through the FORS accreditation levels.

It allows you to collate data on your vehicle fleet to support its management. It may help you to identify areas for improvement, monitor progress towards efficiency, environmental and cost-saving goals or improve customer service.

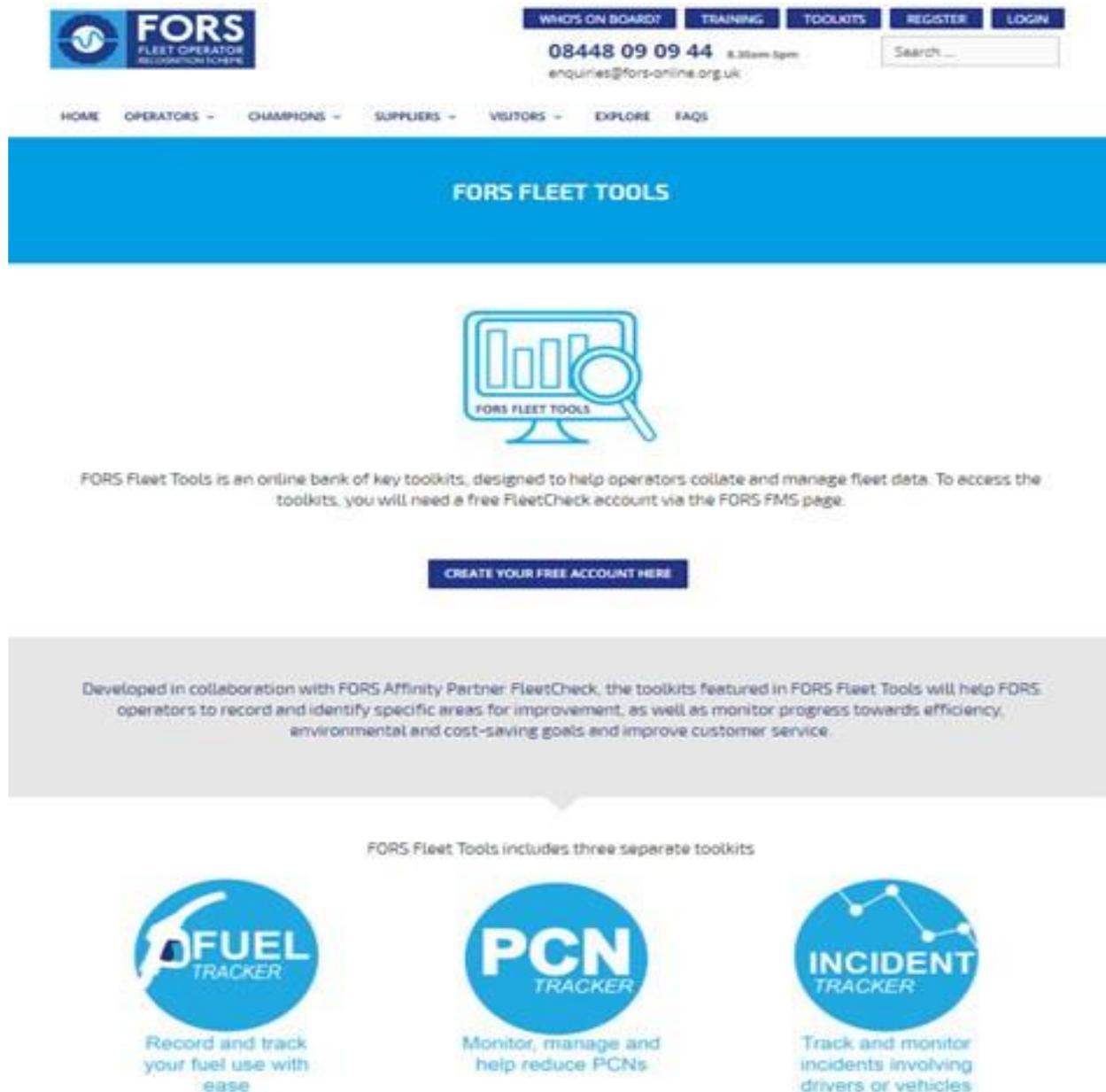
The toolkits comprise of:

- 🔗 A Fuel use tracker which allows you to record and track fuel usage. This will support evidencing of O2, S2, S3 and G2 requirements of the FORS Standard v5
- 🔗 A Penalty Charge Notice tracker which helps you to monitor, manage and reduce the number of penalties your business receives. This will support evidencing of M10, S2 and G2 requirements of the FORS Standard v5
- 🔗 An Incident Tracker which helps you to record, track, monitor and any incidents that your drivers or vehicles are involved in. This will support evidencing of M10, V1, O3, S2 and G2 requirements of the FORS Standard v5
- 🔗 Silver and Gold evidencing system which will allow those going for a Silver or Gold audit to monitor requirements against the relevant checklist as well as to upload and store their evidence

You will also be able to download a summary report for each toolkit.

## 2 Registering to access FORS Fleet Tools

To access the toolkits, you will need to register for a free FleetCheck account. You can create a FleetCheck account by visiting the FORS Fleet Tools web page at <https://www.fors-online.org.uk/cms/fors-fleet-tools/> where you will see the page below.



By clicking on 'create your free account here' button you will be taken to the FORS FMS registration page. Under the FORS Fleet Tools column in the table, you will see a button to register for FORS Fleet Tools.

**FORS FMS**  
Helping you to gain and maintain FORS Accreditation

FORS fleet management system, powered by FleetCheck, delivers a comprehensive platform enabling complete vehicle, driver and organisation management.

FORS FMS delivers the tools you need to obtain and maintain your FORS accreditation. Its intuitive design suits fleets of all sizes, providing a robust audit trail and total peace of mind.

**Management**

- FORS documentation
- Document storage
- Transport infringements
- Vehicle fleet

**Driver**

- Licensing
- Professional development
- Health & Eyeight
- Driving Standards

**Vehicle**

- Inspection and maintenance planning
- Daily walk around checks
- Vehicle tax
- Insurance

**Operations**

- Fuel emissions and air quality
- Routing
- Road traffic collisions

Benefits and Features	FORS Fleet Tools (FFT)	FORS FMS 1 & 2	FORS FMS 3+
Free setup <small>(covering 3,000 per vehicle)</small>	✓	✓	✓
Access to all new FFT, including fuel management, incident management, and RCM management tools	✓	✓	✓
Direct import of performance data to FORS Silver and Gold application forms <small>(covering scores)</small>	✓	✓	✓
Management - checklist to demonstrate which documents are required	✓	✓	✓
Safety data importing	✓	✓	✓
Driver checklist and reminders for when updates are required	✓	✓	✓
Vehicle - checklist that allows you to manage maintenance schedule and provide customised reporting for audits	✓	✓	✓
Operations - checklist and reports to support demonstration of compliance	✓	✓	✓
Free integrated drivers walk around app aligned to FORS requirements, FORS RMS kiosks	✓	✓	✓
Automatic setup	✓	✓	✓
Staff assisted setup	✓	✓	✓
Free Trial period	✓	3 months	1 month
Cost	Free for all FORS members	50% discount for 3 months	10% discounted subscription per vehicle

Please login to register for FORS Fleet Tools or FORS FMS.

Once you click on this button you will receive a separate email from FleetCheck shortly after enabling you to register and set up your account followed by a link to access FORS Fleet Tools.

Once registered you will be provided with the link to access FORS Fleet Tools.

**FORS TOOLS Account created**

Thank you for registering to use FORS TOOLS.

In order to log in to FORS TOOLS, you can access the following link:

<https://my.fleetcheck.co.uk>

Getting started

FORS TOOLS, powered by FleetCheck, is inherently easy to use; it is usually possible to navigate your way around the basic functionality and get to grips with how it works very quickly.

For further help and information please call the FORS helpline on 08448 09 09 44 or by emailing [enquiries@fors-online.org.uk](mailto:enquiries@fors-online.org.uk)

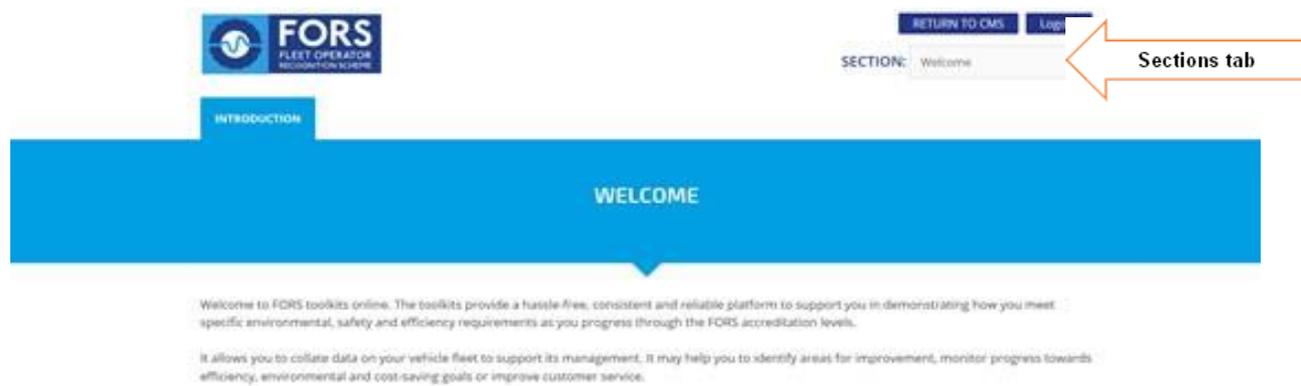
Thank you for using FORS Tools; we are very pleased to be working with you and your company.

Kind regards,  
The FORS Team

To unsubscribe please update your preferences within your FleetCheck profile

### 3 Using the Toolkits

To navigate through the toolkits please use the section tab on the top right-hand corner of this page.



Each page heading has a question mark help icon which you can hover your mouse over to view guidance.



## 4 Company Info

To enable the full features of the toolkits we require you to enter your Company Information in the form.

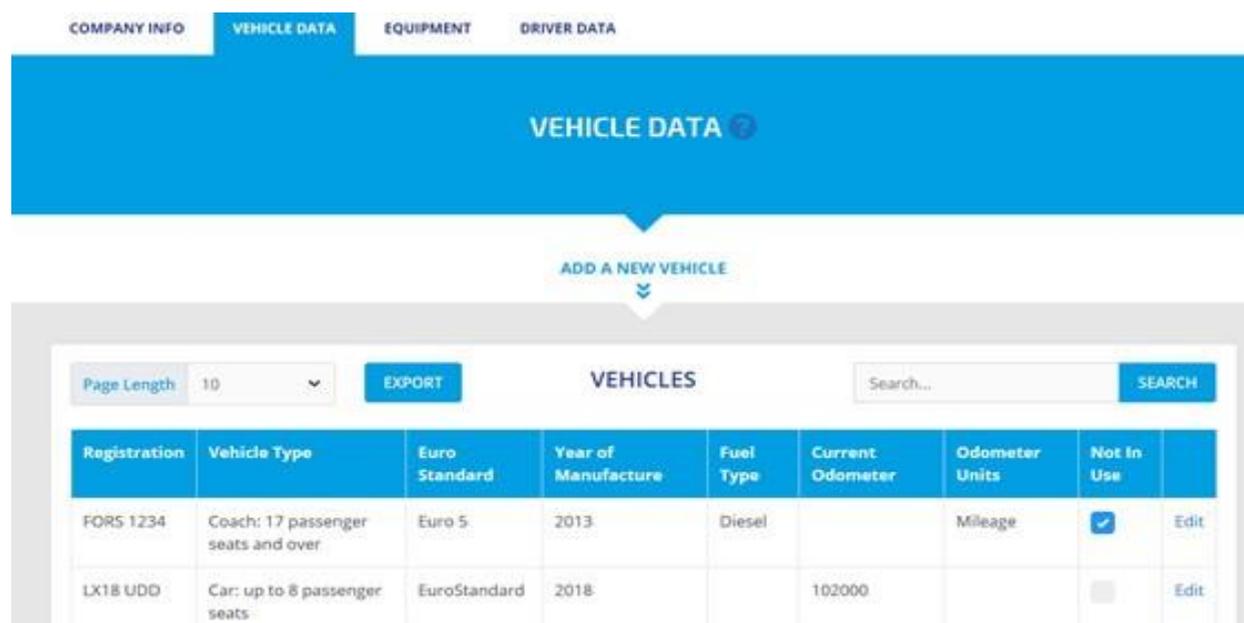
The screenshot shows the 'Company Info' section of the FORS Fleet Tools interface. At the top left is the FORS logo (FORS FLEET OPERATOR RECOGNITION SCHEME). To the right are 'RETURN TO CMS' and 'Logout' buttons, and a 'SECTION:' dropdown menu currently set to 'Fleet Data'. Below the logo is a navigation bar with tabs for 'COMPANY INFO', 'VEHICLE DATA', 'EQUIPMENT', and 'DRIVER DATA'. A large blue banner with the text 'COMPANY INFO' is centered below the navigation bar. Below the banner, there are two lines of instructional text: 'To enable the full features of the toolkits we require you to enter your company data in the form below.' and 'Once you have entered your company data you will need to go to the Vehicle and driver data sections to review and add any additional information.' Below this text are two input fields: 'FORS ID' with the value 'T00001' and 'Company Name' with the value 'Test1'.

Once you have entered your company data you will need to go to the Vehicle and driver data sections to review and add any additional information.

## 5 Vehicle data

You can add, view and edit your vehicle data to the toolkits system. Data includes:

- 🔗 Registration
- 🔗 Vehicle type
- 🔗 Euro Standard
- 🔗 Year of Manufacture



The screenshot displays the 'VEHICLE DATA' section of the FORS Fleet Tools interface. At the top, there are navigation tabs: 'COMPANY INFO', 'VEHICLE DATA' (selected), 'EQUIPMENT', and 'DRIVER DATA'. Below the tabs is a large blue header with the text 'VEHICLE DATA' and a help icon. Underneath the header is a button labeled 'ADD A NEW VEHICLE'. The main content area features a table titled 'VEHICLES'. The table has a header row with the following columns: 'Registration', 'Vehicle Type', 'Euro Standard', 'Year of Manufacture', 'Fuel Type', 'Current Odometer', 'Odometer Units', 'Not In Use', and an 'Edit' button. The table contains two rows of data:

Registration	Vehicle Type	Euro Standard	Year of Manufacture	Fuel Type	Current Odometer	Odometer Units	Not In Use	Edit
FOR5 1234	Coach: 17 passenger seats and over	Euro 5	2013	Diesel		Mileage	<input checked="" type="checkbox"/>	Edit
LX18 UDD	Car: up to 8 passenger seats	EuroStandard	2018		102000		<input type="checkbox"/>	Edit

To add a new vehicle simply click on the 'add a new vehicle' tab.

## 6 Vehicle Safety Equipment

You can also record safety equipment fitted to your vehicle by clicking on equipment and add new equipment tabs. This will allow you to assign safety equipment by date and by location on the vehicle.

The screenshot shows the 'EQUIPMENT' form in the FORS Fleet Tools interface. The form is titled 'EQUIPMENT' and has tabs for COMPANY INFO, VEHICLE DATA, EQUIPMENT, and DRIVER DATA. The EQUIPMENT tab is active. The form contains fields for Vehicle (a dropdown menu), Date Assigned (a date picker), Location on Vehicle (a text input), and Equipment Description (a text area). Below the form is an 'ADD EQUIPMENT' button and a 'CLOSE' button with an upward arrow. Below the form is a table showing the equipment list.

Vehicle	Date Assigned	Description	Location	
LX18 UDD	01-Jan-2019	Front facing camera	Front of Vehicle	Edit

## 7 Driver Data

You can add, view and edit your driver data to the toolkits system. Data includes:

- 🔗 Driver name
- 🔗 License number
- 🔗 Expiry date
- 🔗 License categories

The screenshot shows the 'DRIVER DATA' form and table. The form has tabs for 'COMPANY INFO', 'VEHICLE DATA', 'EQUIPMENT', and 'DRIVER DATA'. The 'DRIVER DATA' tab is active, showing a form with fields for 'First Name', 'Surname', 'Licence Number', and 'Licence Expiry Date'. Below these fields are 'Licence Categories' with checkboxes for B, BE, C1, C1E, C, and CE. An 'ADD DRIVER' button is visible. Below the form is a 'DRIVERS' table with columns for Driver, Licence No, Expiry Date, and Licence Categories. The table contains three rows of data.

Driver	Licence No	Expiry Date	Licence Categories
John Smith			
Paul Smith			
Raj Sharma	RKMF25666F	31-Oct-2019	B, C1,

To add a new driver simply click on the 'add a new driver' tab.

## 8 Fuel use tracker

The FORS Fuel Use Tracker is designed to be easy to use and update - to make it as simple as possible to monitor the fuel use of your vehicles. You can add, view and edit the volume of Fuel used by each vehicle. Data includes:

- 🔍 Purchase date,
- 🔍 Distance travelled in London
- 🔍 Odometer reading
- 🔍 Fuel price units

The screenshot shows the 'FUEL USE TRACKER' interface. At the top, there are tabs for 'FUEL USE TRACKER' and 'SUMMARY REPORTS'. Below the tabs is a large blue header with the text 'FUEL USE TRACKER'. The main area contains several input fields: 'Registration Number' (a dropdown menu), 'Purchase Date' (a date picker showing '02-Jan-2019'), 'Fuel Used' (a text input with a 'Litres' unit), 'Distance Traveled In London' (a text input with a '%' unit), 'Odometer' (a text input with a 'Miles' unit), and 'Fuel Unit Price' (a text input with a 'Pence' unit). Below these fields is a blue 'ADD FUEL' button and a 'CLOSE' button with a home icon. At the bottom, there is a table titled 'FUEL' with columns for 'Vehicle', 'TransactionDate', 'Fuel Used', 'Distance London %', 'Odometer', 'Fuel Unit Price', and an 'Edit' link. The table contains five rows of data for 'LX18 UDD' with a transaction date of '01-Jul-2018', fuel used of '300', distance of '0', odometer of '30000', and fuel unit price of '20000'.

Vehicle	TransactionDate	Fuel Used	Distance London %	Odometer	Fuel Unit Price	
LX18 UDD	01-Jul-2018	300	0	30000	20000	Edit
LX18 UDD	01-Jul-2018	300	0	30000	20000	Edit
LX18 UDD	01-Jul-2018	300	0	30000	20000	Edit
LX18 UDD	01-Jul-2018	300	0	30000	20000	Edit
LX18 UDD	01-Jul-2018	300	0	30000	20000	Edit

To add fuel usage data simply click on the 'add Fuel' tab.

Data will only be automatically completed for a vehicle's fuel use once at least two entries have been made. This is because the spreadsheet uses the odometer reading to calculate the distance travelled - and so it only has a previous reading to compare with a vehicle's second fuel use entry onwards.

## 9 Summary report

To monitor fuel use you can download a PDF report which shows data from your desired baseline date. This allows you to analyse the data for any particular vehicle - or for your entire fleet - for any single month.

FUEL USE TRACKER SUMMARY REPORTS

### SUMMARY REPORTS ?

Report Type  
Monthly Summary

Vehicle  
All Vehicles

Start Date \*  

End Date \*  

London Use Only

RUN REPORT

## 10 Incident Data Entry

You can add, edit, view and monitor vehicle or driver incidents. Data includes:

- 🔗 Vehicle registration
- 🔗 Incident dates
- 🔗 Fatal Incidents
- 🔗 Serious Incidents
- 🔗 Slight Incidents
- 🔗 Damage only Incidents
- 🔗 RIDDOR reportable
- 🔗 Third part costs

INCIDENT ENTRY   INCIDENT TRACKER   PCN ENTRY   PCN TRACKER

## INCIDENT DATA ENTRY

Registration Number:  Incident Date:  Incident Type: Fatal Third Party Costs: £

RIDDOR Reportable:

**ADD INCIDENTS**

**CLOSE**

Page Length: 10 **EXPORT** **INCIDENTS** Search... **SEARCH**

Registration	Vehicle Type	Incident Date	IncidentType	RIDDOR	Third Party Costs	
LX18 UDD	Car: up to 8 passenger seats	12-Dec-2018	Slight	<input checked="" type="checkbox"/>	200	Edit
LX18 UDD	Car: up to 8 passenger seats	10-Dec-2018	Damage Only	<input type="checkbox"/>	0	Edit
LX54 PPU		19-Dec-2018	Damage Only	<input checked="" type="checkbox"/>	1234123	Edit
LX54 PPU		02-Dec-2018	Fatal	<input type="checkbox"/>	2000	Edit

To add Incident data simply click on the 'Add Incident' tab.

## 11 Incident Tracker

To monitor incidents, you can download a PDF report which shows incidents from your desired baseline date

INCIDENT ENTRY   **INCIDENT TRACKER**   PCN ENTRY   PCN TRACKER

## INCIDENT TRACKER

Registration Number: LX18 UDD From Date: 01-Jan-2018 To Date: 31-Dec-2018

**RUN REPORT**

## 12 PCN Data Entry

You can add, edit, view and monitor PCN data by each vehicle and driver.

Data includes:

- 🔗 Vehicle registration
- 🔗 Driver details
- 🔗 PCN dates
- 🔗 London Lorry control PCN
- 🔗 Congestion PCN
- 🔗 Moving traffic PCN
- 🔗 Loading/parking PCN

PCN DATA ENTRY ?

Registration Number

Driver

PCN Date

PCN Type

ADD PCN  
CLOSE

Page Length

EXPORT

PCNS

SEARCH

Registration	Vehicle Type	Driver	PCN Date	PCN Type	
LX18 UDD	Car: up to 8 passenger seats	Paul Smith	11-Dec-2018	Lorry Control	<a href="#" style="color: #0070C0; text-decoration: none;">Edit</a>
LX56 FOR	Van: Medium 1.8T to 2.6T	Raj Sharma	13-Dec-2018	Moving Traffic	<a href="#" style="color: #0070C0; text-decoration: none;">Edit</a>

To add PCN data simply click on the 'Add PCN's' tab.

## 13 PCN Tracker

To monitor PCN's you can download a Pdf report which shows PCN's from your desired Vehicle or driver and baseline date.

## 14 Submitting Silver or Gold evidence into FORS

For those going for a Silver or Gold audit, you can monitor your progress against the requirements using the Silver and Gold checklists and there is a function to upload, store and submit your Silver and Gold performance data into to the FORS evidencing system.

To use this function simply navigate to the Evidencing tab add your audit period by clicking on the 'Add audit period' tab. You then need to enter your planned audit submission date and intended level in the boxes and click on the 'add new audit period' button.

The screenshot displays the 'EVIDENCING' section of the FORS Fleet Tools interface. At the top, there is a blue header with the word 'EVIDENCING' and a help icon. Below the header, there are two input fields: 'Planned Audit Submission Date \*' with a calendar icon and 'Intended Level \*' with a dropdown menu currently set to 'Silver'. A blue button labeled 'ADD NEW AUDIT PERIOD' is positioned below these fields. To the right, there is a grey box with the heading 'Looking to maintain the FORS Standard?' and a blue icon of a laptop. The text inside the box states: 'FORS Fleet Management System (FORS FMS) has been tailored to support your needs.' Below this text is a blue button labeled 'FIND OUT MORE'. At the bottom center of the form, there is a 'CLOSE' button with an upward-pointing arrow icon.

You will then be able to view your audit period in the table at the bottom of the page.

Page Length 10 AUDIT PERIODS

Intended Level	OC Count	End Date	In Progress	Completed		
Silver	0	31-Mar-2019	0.00%	0.00%	<a href="#">View</a>	<a href="#">Delete</a>
Silver	0	31-Mar-2019	0.00%	0.00%	<a href="#">View</a>	<a href="#">Delete</a>
Silver	0	30-Apr-2019	0.00%	0.00%	<a href="#">View</a>	<a href="#">Delete</a>
Silver	0	31-Mar-2019	0.00%	0.00%	<a href="#">View</a>	<a href="#">Delete</a>
Silver	0	30-Nov-2019	0.00%	0.00%	<a href="#">View</a>	<a href="#">Delete</a>
Silver	0	30-Nov-2019	0.00%	0.00%	<a href="#">View</a>	<a href="#">Delete</a>
Gold	0	30-Apr-2019	0.00%	0.00%	<a href="#">View</a>	<a href="#">Delete</a>
Gold	0	30-Apr-2019	0.00%	0.00%	<a href="#">View</a>	<a href="#">Delete</a>
Gold	0	30-Apr-2019	0.00%	0.00%	<a href="#">View</a>	<a href="#">Delete</a>
Silver	0	12-Nov-2019	0.00%	0.00%	<a href="#">View</a>	<a href="#">Delete</a>

The table will indicate:

- 🔍 The intended level (Silver or Gold)
- 🔍 Operating centre count
- 🔍 End date
- 🔍 % of evidencing in progress
- 🔍 % of evidencing completed

Once you are ready to begin to add data click on the view button appropriate to your audit and you will see a list of relevant Silver or Gold requirements.

<input checked="" type="radio"/> S1. Maintain FORS Bronze	+
<input type="radio"/> S2. Operational Improvement	+
<input type="radio"/> S3. Audible warning systems	+
<input type="radio"/> S4. Blind-spot Minimisation	+
<input type="radio"/> S5. Vulnerable Road User Safety Training	+
<input type="radio"/> S6. Performance Data	+
<input type="radio"/> S7. Fuel and Emissions	+
<input type="radio"/> S8. Road Risk	+

By clicking on each requirement, you will be able to begin to populate these fields.

S1. Maintain FORS Bronze +

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S2. Operational Improvement -

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**Requirement:**  
 Fleet operators shall demonstrate that senior management reviews and decisions result in the development of the business and that such changes themselves are reviewed.

**Purpose:**  
 To ensure the continuing operational improvement of the business

**Demonstration:**  
 Fleet operators shall show evidence of effective management to develop the business, not just running the day to day operation. This may be through indicating review recommendations that have been actioned or other evidence of strategic decision making from senior management and monitoring of actions. This may follow procedures in any existing robust quality management system.

Evidence of decisions made to improve the business may include the provision of more efficient equipment or vehicles, increasing operational safety through the introduction of better working practices, developing a strategy for targeted training etc.

<p><b>Evidence Description</b></p> <div style="background-color: #ccc; height: 30px; width: 100%;"></div>	<p><b>Document Upload</b></p> <div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #007bff; color: white; padding: 2px 5px;">Browse</span> <span style="float: right; background-color: #007bff; color: white; padding: 2px 5px;">Upload</span> </div> <p>Uploaded Documents</p>
---	--

**Requirement Status**

In Progress

**Notes**

Save

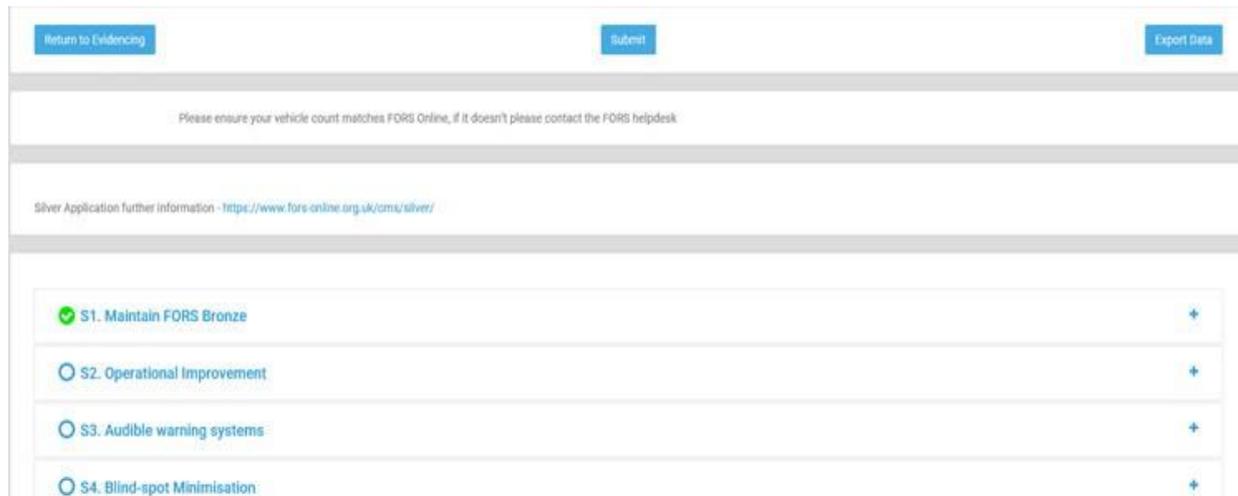
**Useful Resources:**  
[FORS Associate offers and discounts](#)

## FORS Fleet Tools

Once each relevant section of the worklist has been populated you will need to select the 'completed' button on the 'Requirement Status' drop-down box. Once this is complete a green tick will appear to show it is marked as complete.



Following this you will need to press the 'submit' button at the top of the screen to send the performance data directly to the FORS evidencing system. This will start a new application in the FORS evidencing system and prepopulate the relevant fields with performance data.



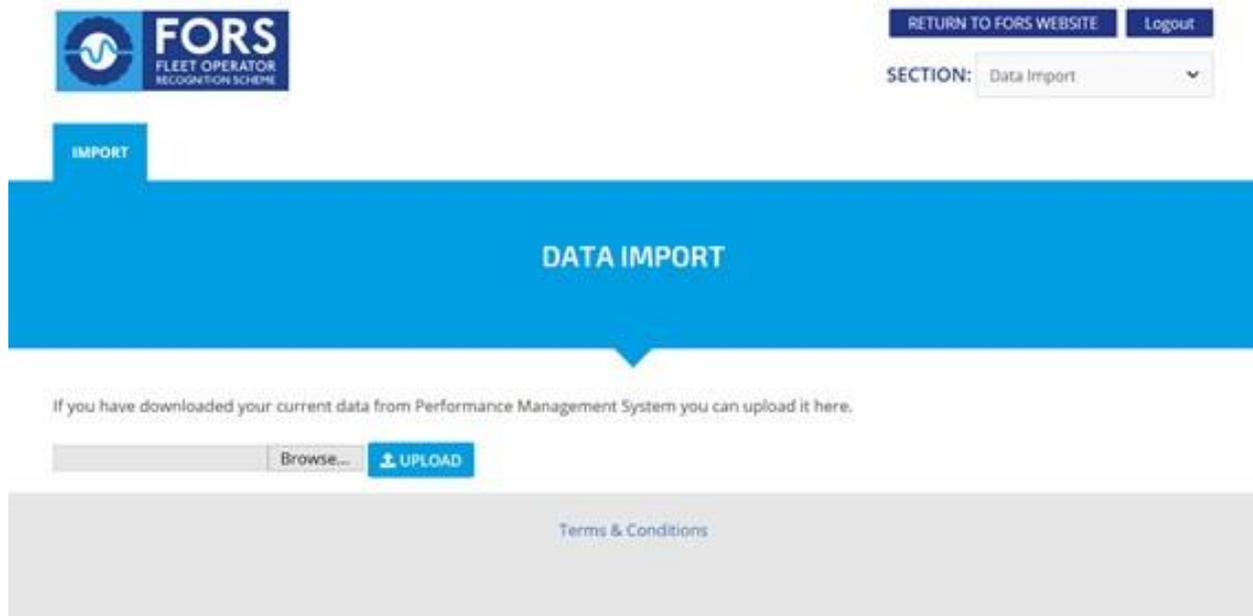
Now that your Vehicle Safety Equipment, Fuel, PCN and incident data, notes and attachments have been sent to the FORS evidencing system; you will now need to check this data in the newly created application in the FORS evidencing system to ensure that is correct. There is a link at the top of the page which will take you to your application in the FORS evidencing system.

Please note that by submitting evidence via FORS Fleet tools you are not completing your actual FORS application, you will still need to login to the FORS evidencing system, review all data and complete additional information requested.

## 15 Import existing data

You can upload existing data in Excel format from the FORS Performance Management System into the FORS Fleet Tools. You can upload the required data by pressing the 'browse' button, selecting the required file and then pressing the blue 'upload' button.

Please note only existing data from the FORS Performance Management System can be imported into the FORS Fleet Tools, all other existing data from PCN and incident trackers needs to be inputted manually.



For further help and information please call the FORS helpline on 08448 09 09 44 or by emailing [enquiries@fors-online.org.uk](mailto:enquiries@fors-online.org.uk)

