

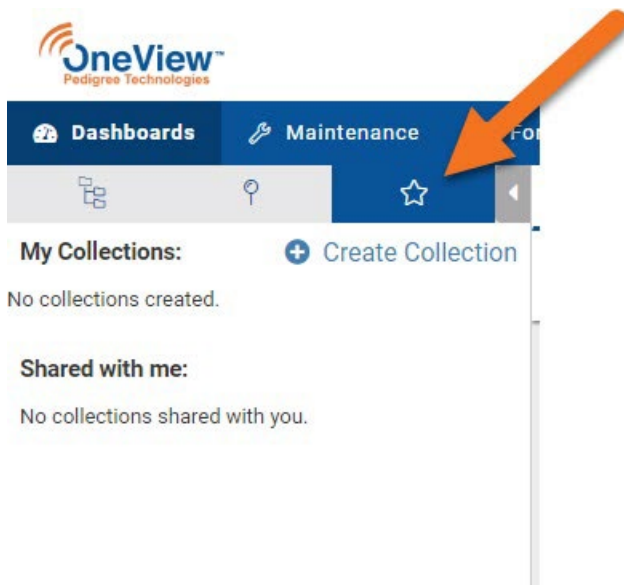
Collections

Collections are a great way to make favorites folders that you can select across all the OneView tools, like reports, dashboards, alarms and more. A collection is a group of assets/users that have been saved to easily be used in reports, dashboard modules, and other areas of OneView. Collections that have been created and saved are specific to your account but can be shared with other OneView user groups in your organization.

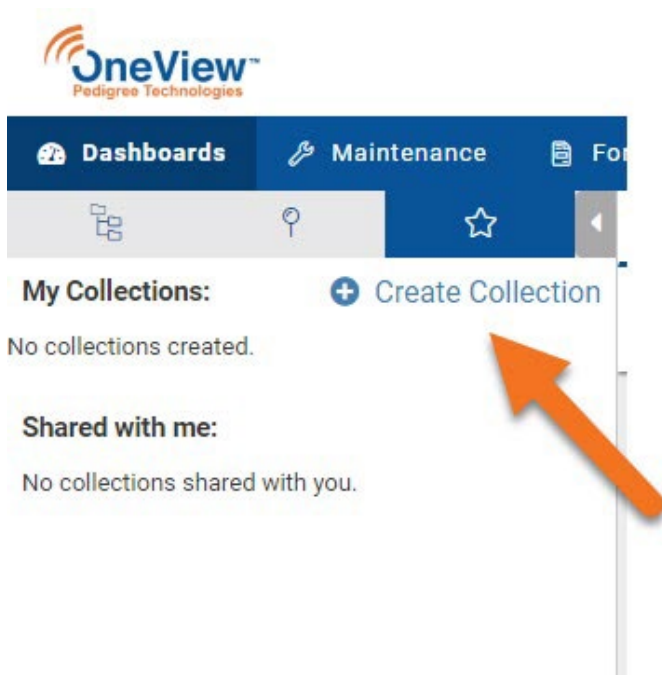
How to create a new collection

Collections can be created using the Star icon in the upper left corner of OneView.

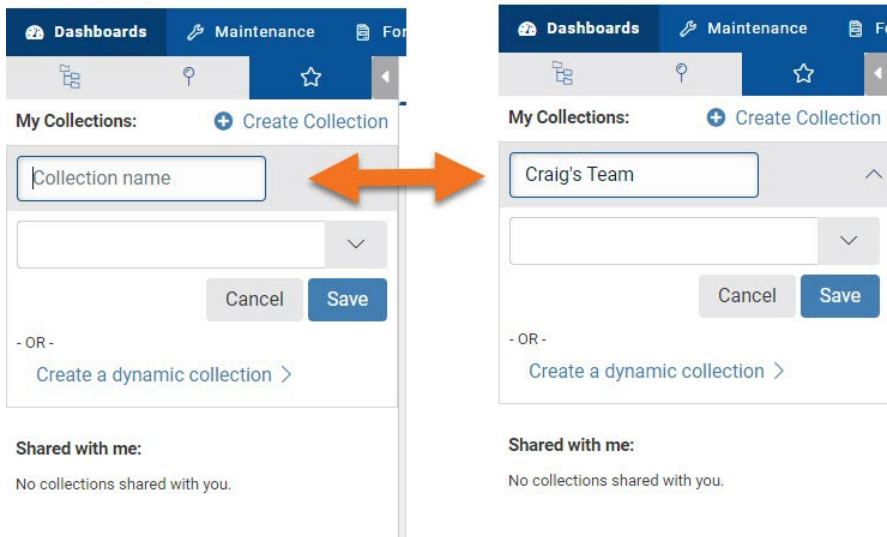
1. Select the Star Icon. The collections section will display below the star.



2. In order to create a new collection click on the plus sign "Create Collection" in the upper right corner of the collections area



3. Give the Collection a name.



My Collections: + Create Collection

Collection name

Cancel Save

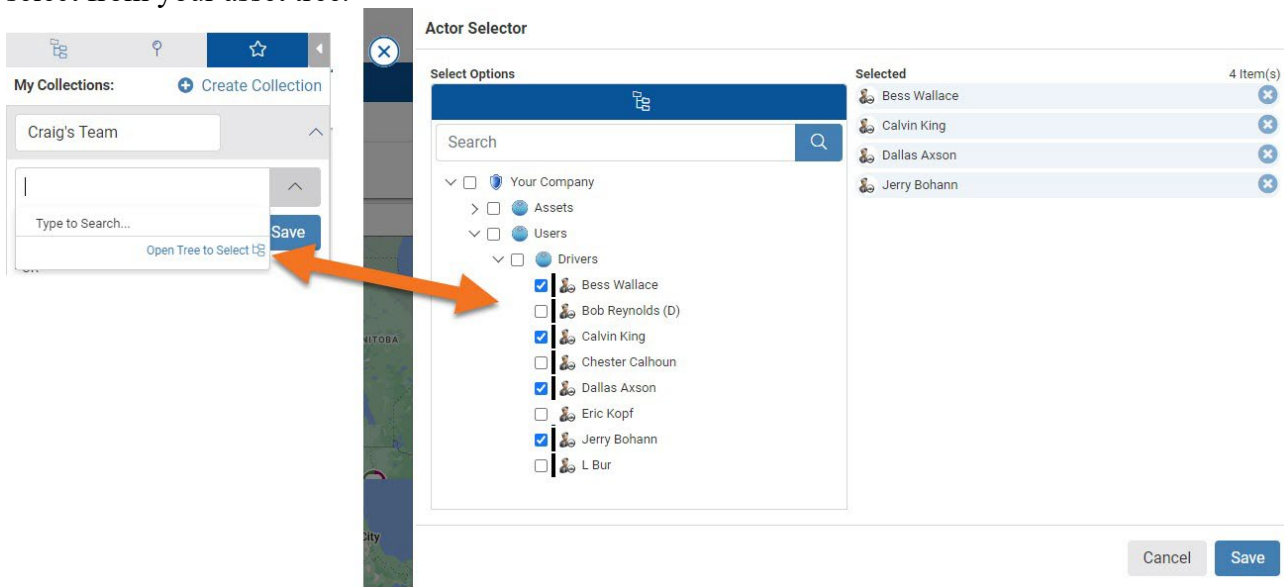
- OR -

[Create a dynamic collection >](#)

Shared with me:

No collections shared with you.

4. Then select the assets or users/drivers to be included. Use the search or click on "Open Tree to Select" to select from your asset tree.



Actor Selector

Select Options

Search

☐ Your Company

☐ Assets

☐ Users

☒ Drivers

☒ Bess Wallace

☐ Bob Reynolds (D)

☒ Calvin King

☐ Chester Calhoun

☒ Dallas Axson

☐ Eric Kopf

☒ Jerry Bohann

☐ L Bur

Selected 4 Item(s)

Bess Wallace

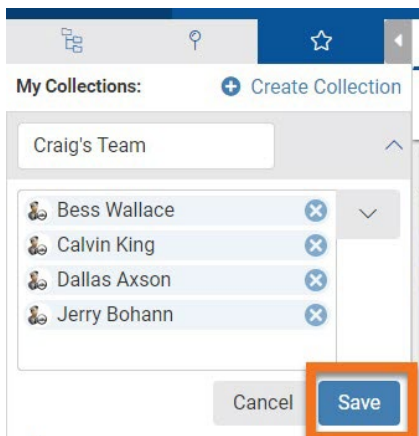
Calvin King

Dallas Axson

Jerry Bohann

Cancel Save

5. Finally you'll need to click Save to create the Collection.



My Collections: + Create Collection

Craig's Team

Bess Wallace

Calvin King

Dallas Axson

Jerry Bohann

Cancel Save

Once the collection is created and saved, it will be available for use in dashboard modules, reports, alert, and other actor selection fields, by selecting the star on the asset Selector window,

Reports >> Report Viewer

Select Template*

Scorecard Report

Report that compares multiple assets using a specified scorecard as the criteria.

Date Range

Today (30-Aug-22 12:00 AM (CDT) - 30-Aug

Assets*

Type to Search...

Open Tree to Select

Save Report

Generate Report

×

Actor Selector

Select Options

☆

My Collections:

☒ Craig's Team

▼

Shared with me:

No collections shared with you.

Selected

1 Item(s)

Craig's Team

×

Cancel

Save

or searching for the collection in a search field.

Reports » Report Viewer

Select Template*

Scorecard Report

Report that compares multiple assets using a specified scorecard as the criteria.

Date Range

Today (30-Aug-22 12:00 AM (CDT) - 30-Aug

Assets*

Craig's team

Craig's Team

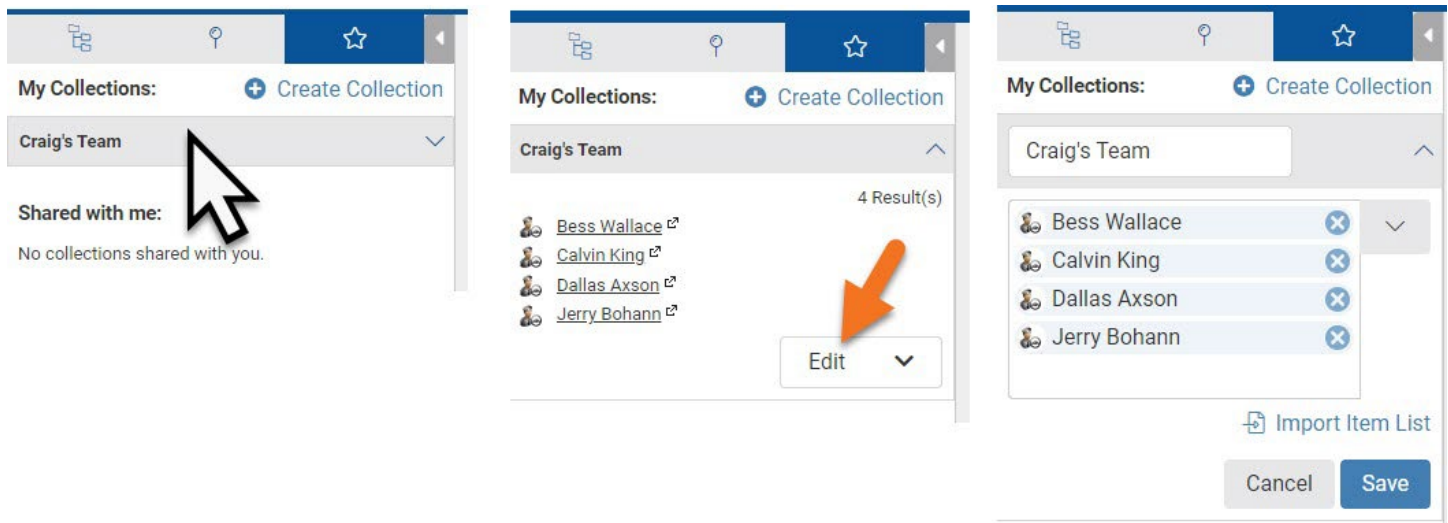
Open Tree to Select

Save Report

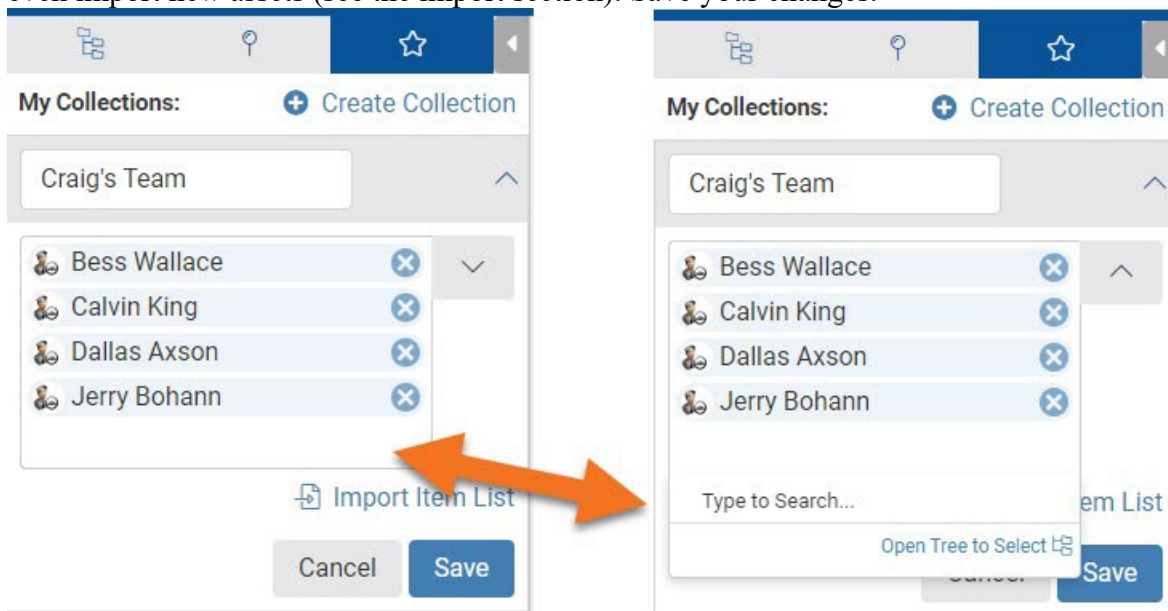
Generate Report

How to edit a collection

Collections can be edited by clicking on the Collection and selecting Edit.



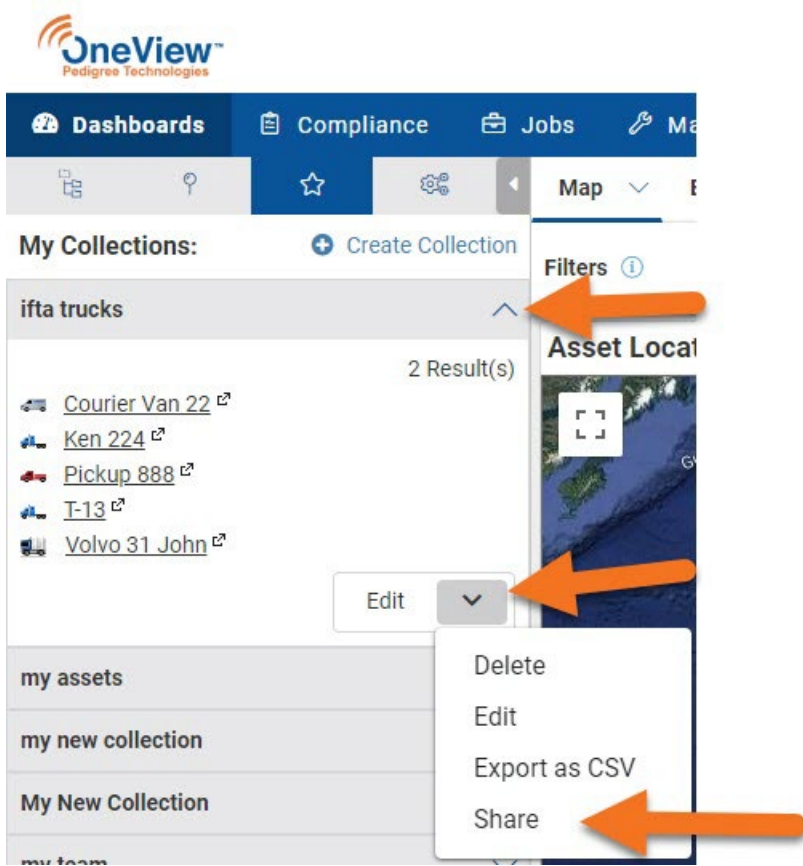
Edit the name, or add (click in the white space to bring up tree options) or delete assets (by clicking the x) or even import new assets (see the import section). Save your changes.



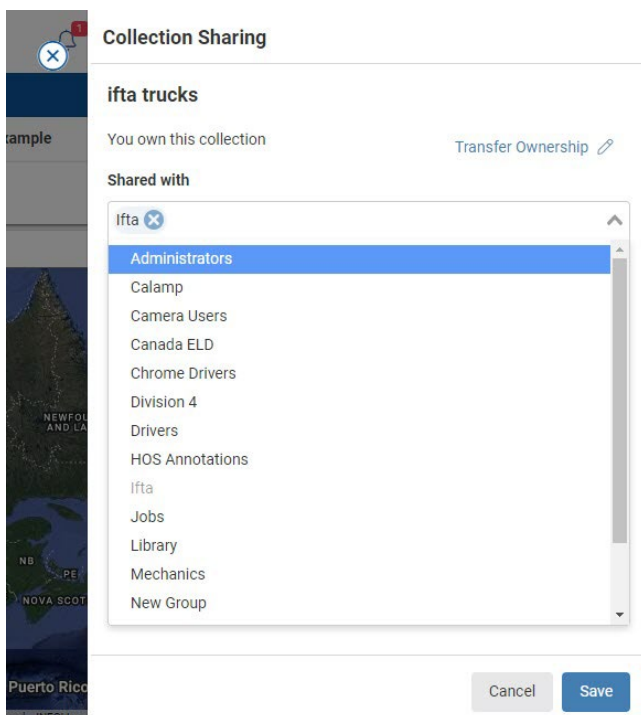
Sharing your Collection

After creating a collection, an admin user can share that collection with groups of users.

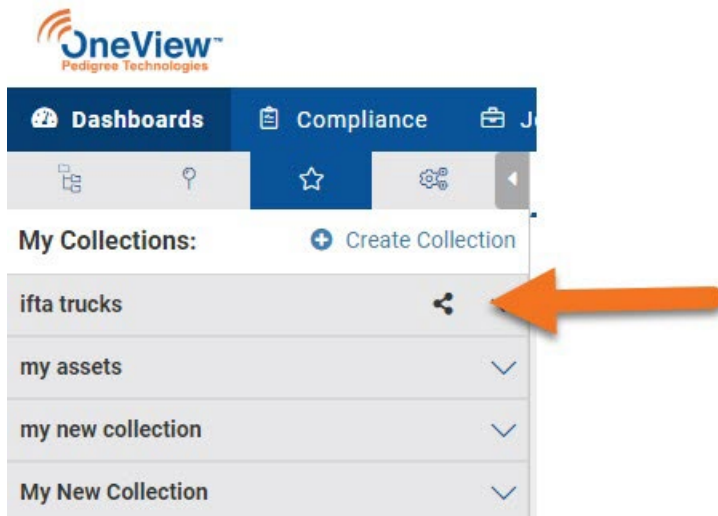
1. Click on the collection you want to share.
2. Click the dropdown arrow next to the word Edit.
3. Choose Share.



4. Choose the groups to share this collection and then Save.



You will now see a sharing icon on the collection that you have shared. Users that you have share this collection with will also see the share icon on the collection.

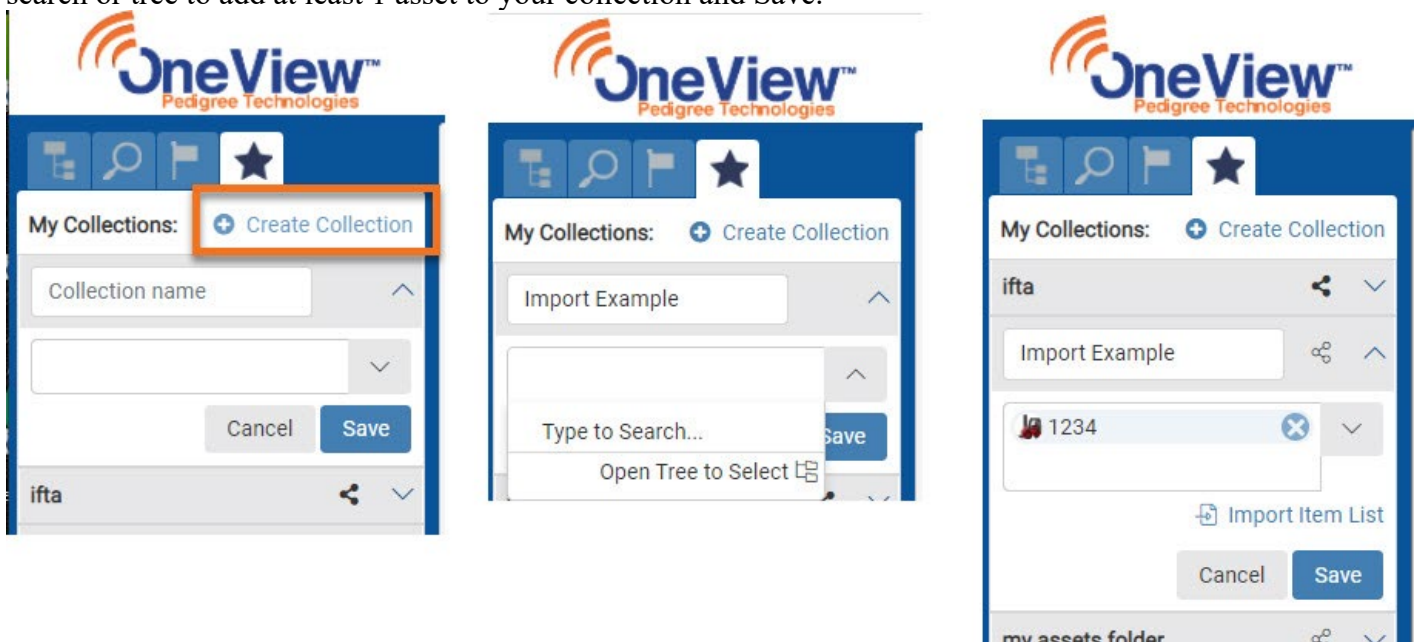


Edit Collection Sharing/Delete Collection Sharing

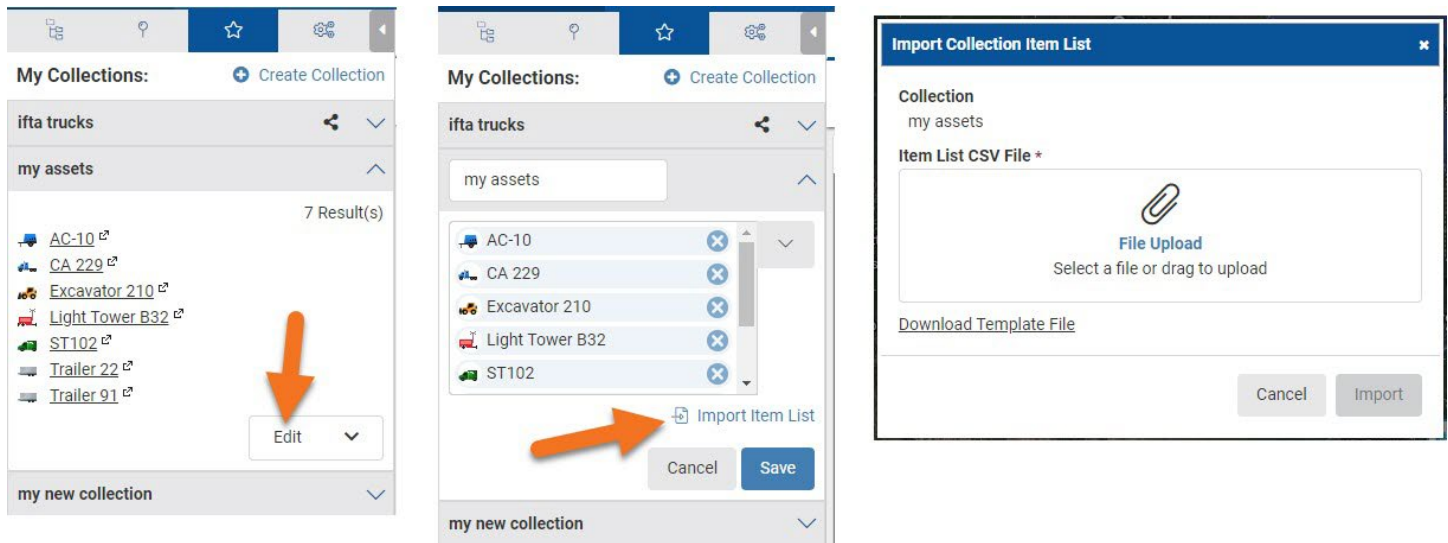
If you want to stop sharing your collection or change the groups that collection is shared with, click on the collection and use the edit dropdown again to select Sharing. Un-check the groups to remove. If you delete all shared groups, the collection will no longer be shared. Save your changes.

Import Collection

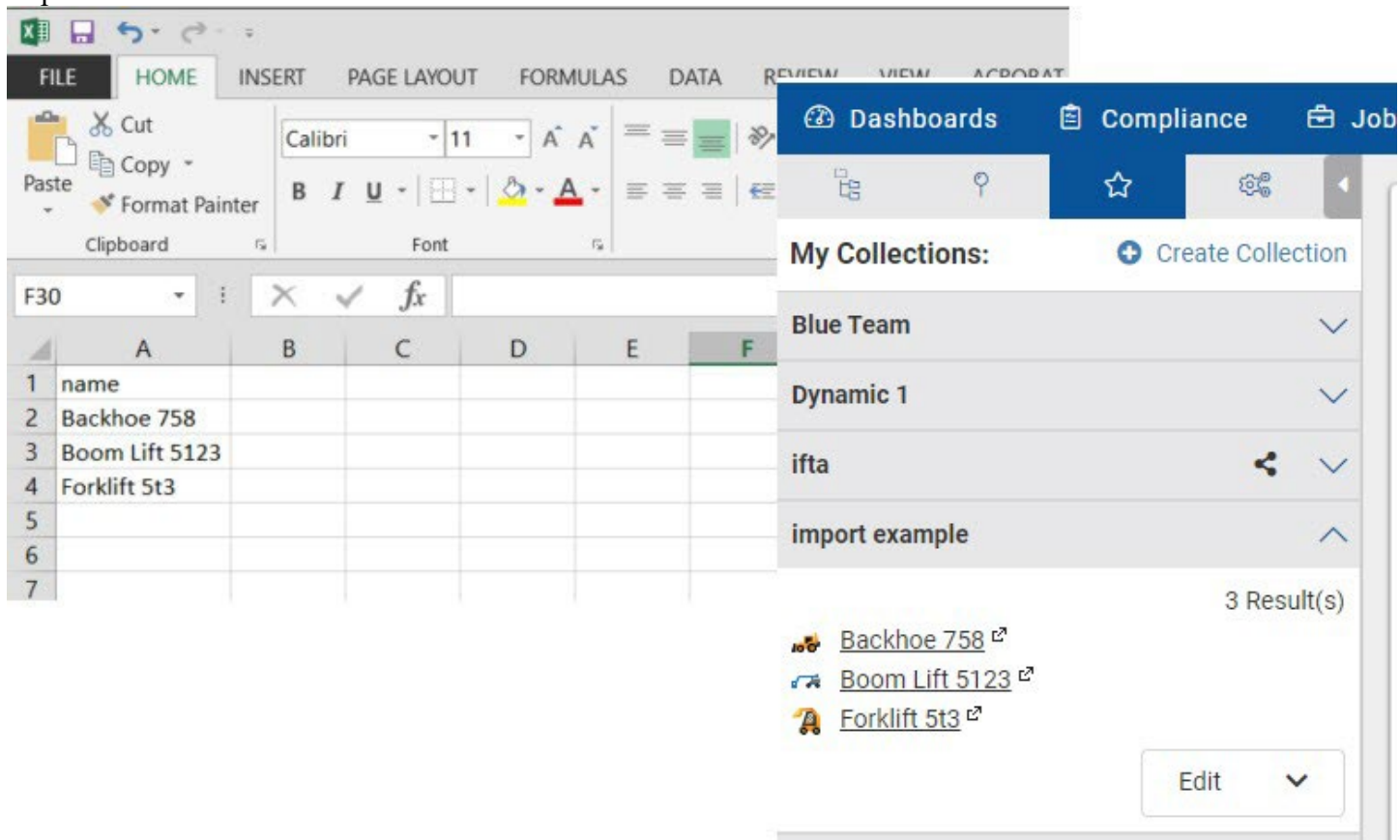
After creating a collection and adding at least 1 actor into it, you can simply upload the rest through a spread sheet. Use the create collection plus button link to start a new collection. Name your collection and use the asset search or tree to add at least 1 asset to your collection and Save.



Go back to the saved collection and click the Edit button to reveal an Import Item List option. This will open a window where you can download the template csv.



Add the names of the assets you want to import and save the file as a .csv which you can then upload into the Import Collection Item List window.

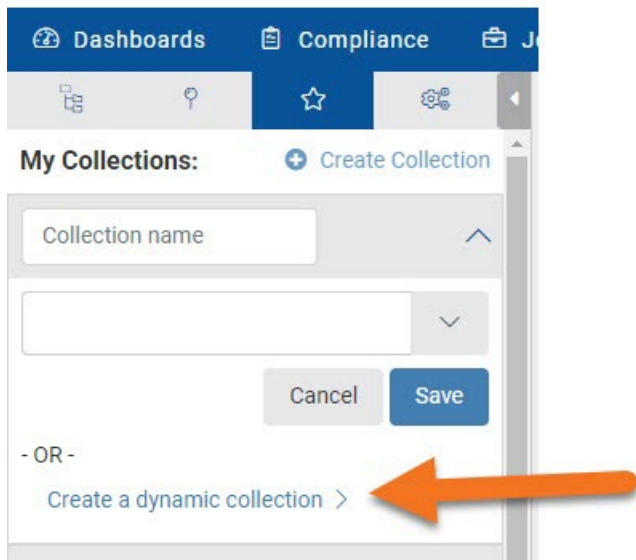
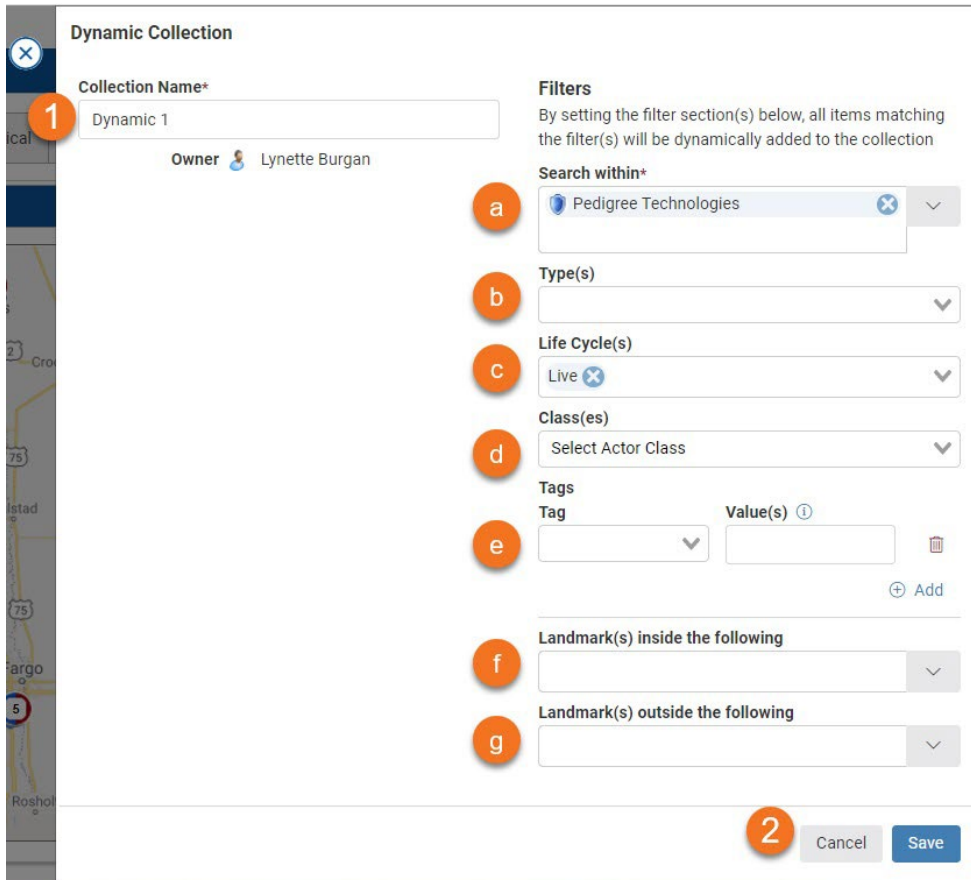


Dynamic Collections

You can use the Dynamic Collections to create a collection that will change based on the rules you set up by choosing the filters that will run your collection. The possibilities and use cases for dynamic collections are endless.

Create Dynamic Collection

Use the same “Create Collection” option as you would when creating any other collection, but use the “Create a dynamic collection” that appears below the Cancel/Save buttons.

The screenshot shows the 'Dynamic Collection' configuration form. It has a title bar with a close button. The form is divided into several sections:

- Collection Name***: A text input field with the value 'Dynamic 1'. A red circle with the number '1' is next to it.
- Owner**: A dropdown menu showing 'Lynette Burgan'.
- Filters**: A section with the text 'By setting the filter section(s) below, all items matching the filter(s) will be dynamically added to the collection'.
- Search within***: A dropdown menu showing 'Pedigree Technologies'. A red circle with the letter 'a' is next to it.
- Type(s)**: A dropdown menu. A red circle with the letter 'b' is next to it.
- Life Cycle(s)**: A dropdown menu showing 'Live'. A red circle with the letter 'c' is next to it.
- Class(es)**: A dropdown menu showing 'Select Actor Class'. A red circle with the letter 'd' is next to it.
- Tags**: A section with a 'Tag' dropdown menu and a 'Value(s)' input field. A red circle with the letter 'e' is next to the 'Tag' dropdown. There is an 'Add' button with a plus icon.
- Landmark(s) inside the following**: A dropdown menu. A red circle with the letter 'f' is next to it.
- Landmark(s) outside the following**: A dropdown menu. A red circle with the letter 'g' is next to it.

At the bottom right, there are 'Cancel' and 'Save' buttons. A red circle with the number '2' is next to the 'Save' button.

1. Collection Name: give your new dynamic collection a name

Filters:


- a. Search Within: this is your asset tree. You can choose any region or all regions to include. This will sort through the chosen regions to find the assets/users/ etc that match any of your other filters.
- b. Types: choose the types of objects to use, like assets, or users, or landmarks, or reporting locations, etc.
- c. Life Cycle(s): you can use any life cycle to filter.
- d. Class(es): choose the actor classes to include in your collection.
- e. Tags: choose any tags you want to include in the collection and enter the value of that tag that you want to include
- f. Landmarks(s) inside the following: use this field if you want your collection to only include selections that are physically inside a certain landmark(s)
- g. Landmark(s) outside the following: use this field if you want your collection to only include selections that are physically outside a certain landmark(s)

2. Cancel or Save your dynamic collection

1. Name your dynamic collection

Dynamic Collection

Collection Name*

Owner  Lynette Burgan

Filters: you do not have to use every filter, just the ones that you need to run your collection. These are how you set rules for the collection, so it knows to include certain objects and leave others out.

a. Search within This filter will allow you to select from your asset tree, either by search or by using the tree to check any folders you want to include in the possible results. By default your entire company will be selected. You can select from the tree, from landmarks, from established collections in your possible results. Choose to include only certain regions, excluding all assets from other regions, as an example.

Filters

By setting the filter section(s) below, all items matching the filter(s) will be dynamically added to the collection

Search within*
🛡️ Demo Shipping Services, LLC

Type(s)

Life Cycle(s)
Live

Class(es)
🚛 Tanker Trailer
🏗️ Loader
🚛 Trailer
🚛 Semi-tractor

Tags
⊕ Add

Landmark(s) inside the following

Landmark(s) outside the following

Actor Selector

Select Options

- ✓ ☒ 🛡️ Demo Shipping Services, LLC
 - ☐ 👤 API Test
 - ✓ ☐ 🌐 Assets
 - ☐ 📡 53148
 - > ☐ 📡 Bluetooth Trackers
 - ✓ ☐ 📡 CA Tractors
 - ☐ 🚛 CA 1
 - ☐ 🚛 CA 3
 - ✓ ☐ 📡 CA Trailers
 - ☐ 🚛 CAT2
 - ☐ 🚛 CAT3
 - ☐ 🚛 Cat5
 - ☐ 🚛 TTFM-01
 - ✓ ☐ 📡 Containers
 - ☐ 📦 40Y-04334
 - ☐ 📦 40Y-04335
 - ☐ 📦 GFC_70003276
 - ☐ 📦 GFC_70003302
 - ☐ 📦 GFC_70003341
 - ✓ ☐ 📡 Equipment
 - ☐ 🚛 1234
 - ☐ 🏗️ AEMP Asset
 - ☐ 📡 Appareo Verizon Test
 - ☐ 🏗️ Backhoe 758
 - ☐ 🚛 Boom Lift 5123
 - ☐ 🚛 Forklift 5t3

b. Type(s); this filter allows you to set what type of object to include, like assets, or users. As an example, you could pick from the entire company but choose just users to include in your collection.

Type(s)

- Asset
- Carrier
- Customer
- Landmark
- Region
- Reporting Location
- User

c. **Life Cycle(s)**: you can choose to include just live or pre-installed or retired assets or any combination of those choices.

Life Cycle(s)

Live 



Pre-Installed


Live


Retired


d. **Class(es)**: you can narrow which actor classes you want to include in your results. Select as many as you want.


Class(es)


 Semi-tractor 


 HVAC Heater (Gas)


 HVAC Red Heater


 HVAC White Heater


 Hydrovac Truck


 Jet/Vac Combo Truck


 Jetter Truck


 Landmark


 Landmark Group


 Loader

 Mechanic Truck

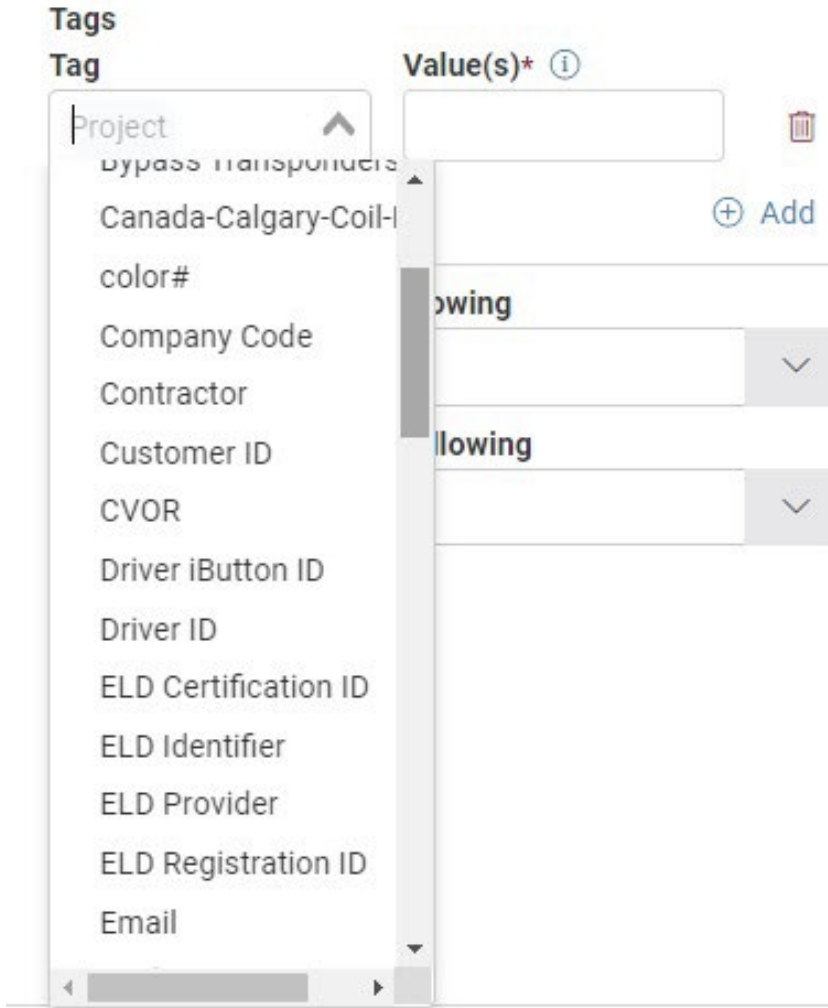
 Mobile Air Compressor

 Mobile Camera

 Mobile Generator

 Mobile Light Tower

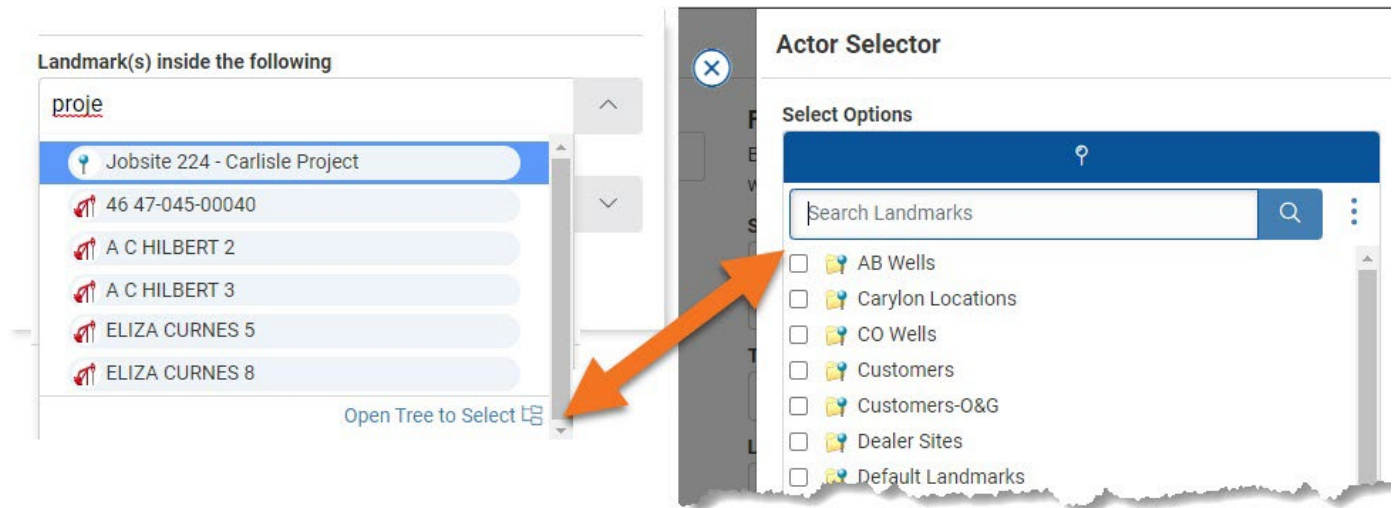
e. **Tags:** choose from any tags that you use in your account to filter for in the Tags filter.



Add the tag value to any of the tags you choose. Use the trash can to remove any options you've added and no longer want, and use the (+) Add button to add any number of additional tags to your filter.



f. Landmark(s) inside the following: If your filter requires the result to only include assets inside any particular landmark or a number of landmarks, use the search to find that landmark(s) or use the tree to select the landmark(s) from your landmark groups.



f. Landmark(s) outside the following: If your filter requires the result to only include assets outside any particular landmark or a number of landmarks, use the search to find that landmark(s) or use the tree to select the landmark(s) from your landmark groups.

