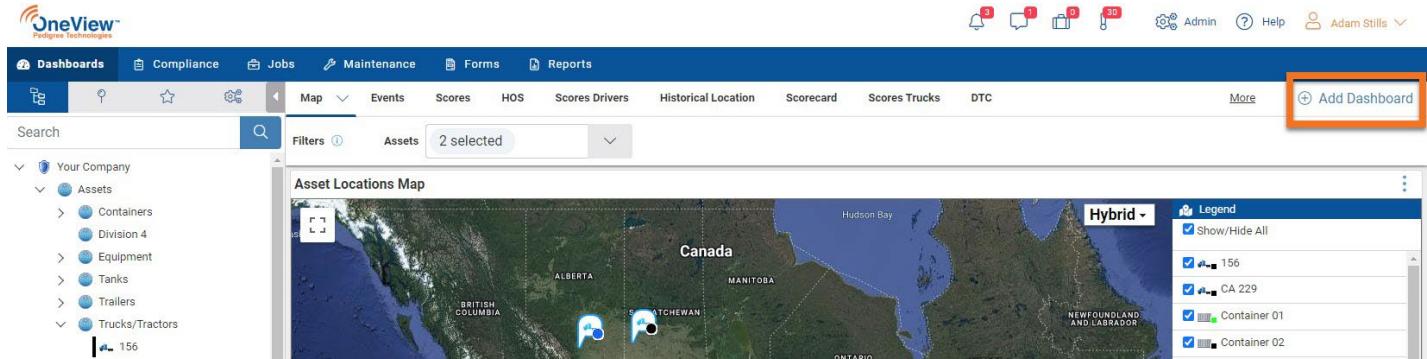


Dashboard Feature in OneView

Use the Dashboard area to configure and customize your account.

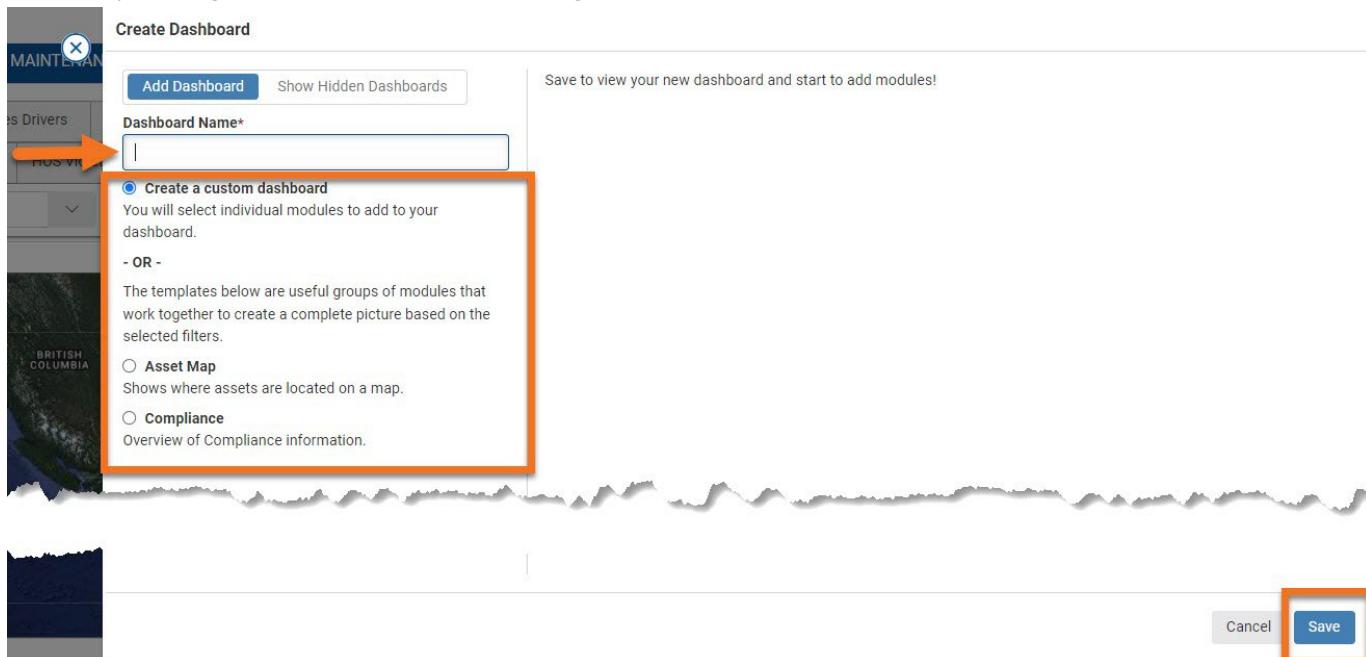
Adding Dashboard Tabs

To add a dashboard tab, there is a **(+)** **Add Dashboard** option in the upper right corner of your Dashboard area.



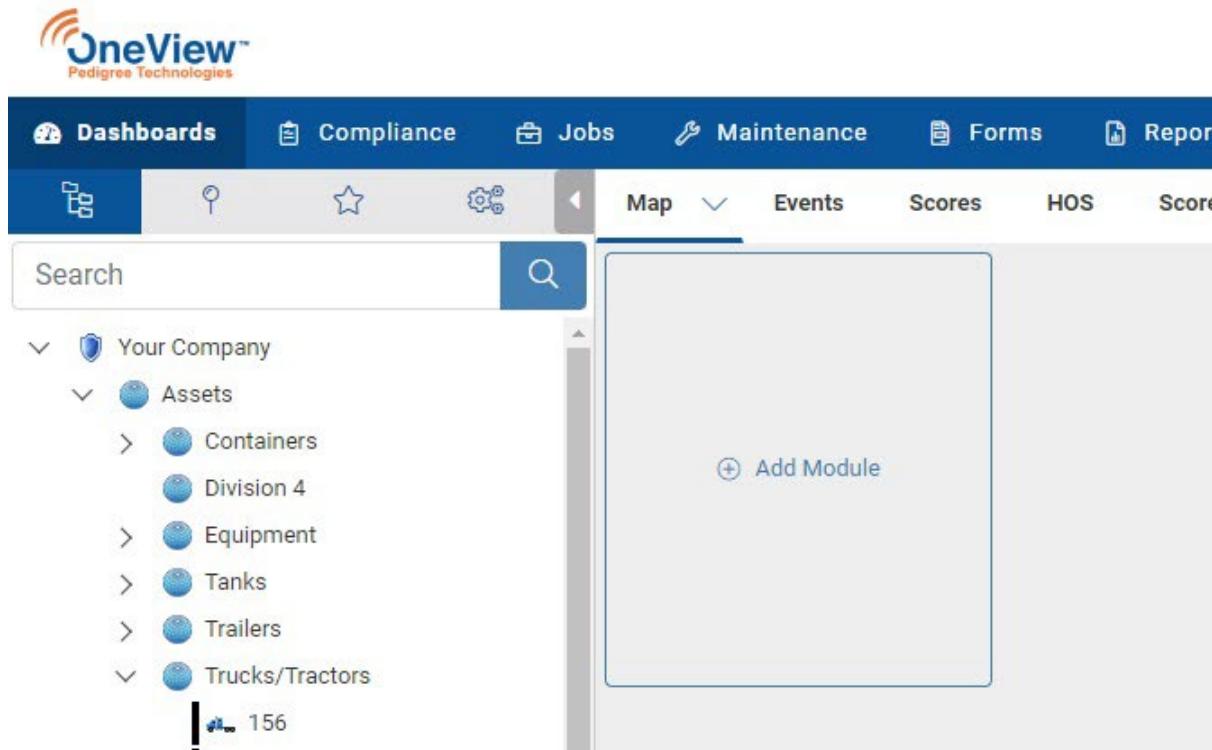
The screenshot shows the OneView Dashboard interface. At the top, there's a navigation bar with links for Dashboards, Compliance, Jobs, Maintenance, Forms, and Reports. Below the navigation bar is a search bar and a sidebar with a tree view of company assets like Assets, Containers, Division 4, Equipment, Tanks, Trailers, and Trucks/Tractors. The main content area displays an 'Asset Locations Map' of Canada with several asset icons. On the right side, there's a legend with checkboxes for 'Show/Hide All', '156', 'CA 229', 'Container 01', and 'Container 02'. In the top right corner of the dashboard area, there's a button labeled '(+) Add Dashboard' which is highlighted with an orange box.

After clicking “**(+)** **Add Dashboard**” you will see an option to Name your dashboard. Enter the name of your new dashboard tab in the field and then choose either Create a Custom Dashboard to pick from a number of modules, or use a template that has been pre-designed. Then click save (bottom right).



The screenshot shows the 'Create Dashboard' dialog box. It has a 'Dashboard Name*' input field with a placeholder 'Enter a name for your dashboard' and a 'Save' button. Below the input field, there are two options: 'Create a custom dashboard' (selected) and 'Asset Map' or 'Compliance' (disabled). A large orange box highlights the 'Create a custom dashboard' section. Another orange arrow points to the 'Create a custom dashboard' label. At the bottom right of the dialog box, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted with an orange box.

The new dashboard tab will appear and on it will be a block with a link to add a Module



Search

- Your Company
- Assets
 - Containers
 - Division 4
 - Equipment
 - Tanks
 - Trailers
 - Trucks/Tractors

+ 156

Map

Events

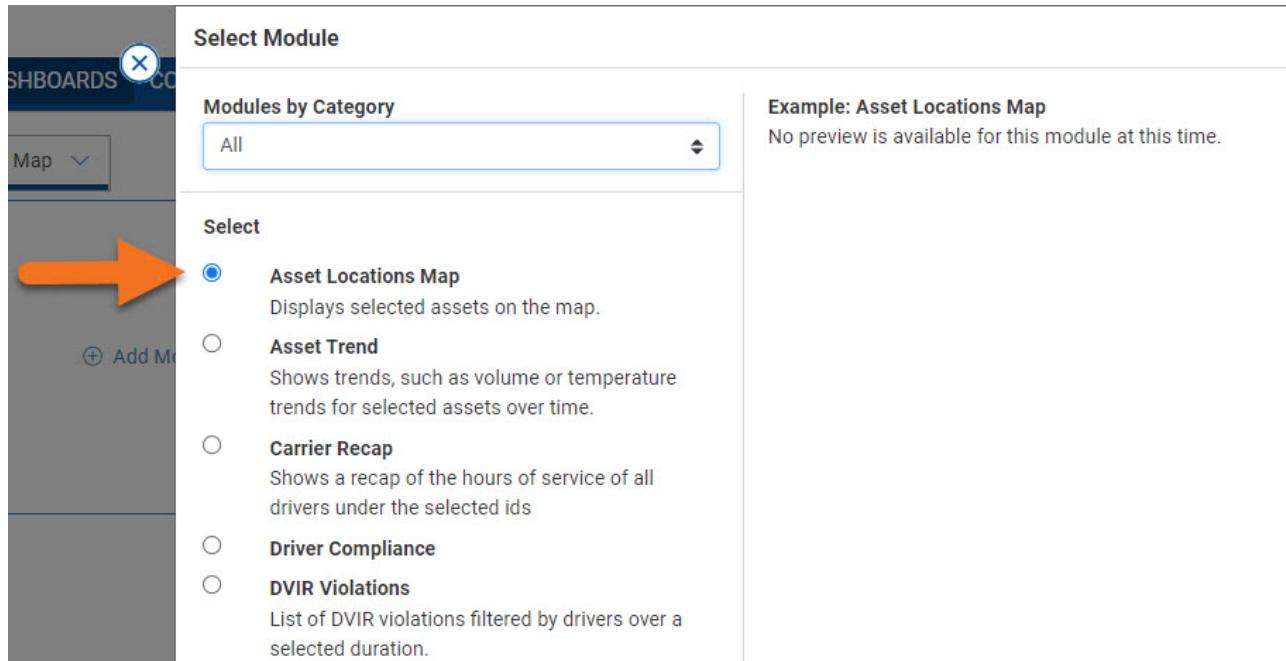
+ Add Module

Add Module

Click on the Add Module link to bring up a list of the modules available. Here you can choose one to cover the entire page or after adding one, resize it to your preference and add more modules.

One Module for Entire Page

From the list of modules, choose the module you want by clicking the radio bubble next to it.



Select Module

Modules by Category

All

Select

Asset Locations Map
Displays selected assets on the map.

Asset Trend
Shows trends, such as volume or temperature trends for selected assets over time.

Carrier Recap
Shows a recap of the hours of service of all drivers under the selected ids

Driver Compliance

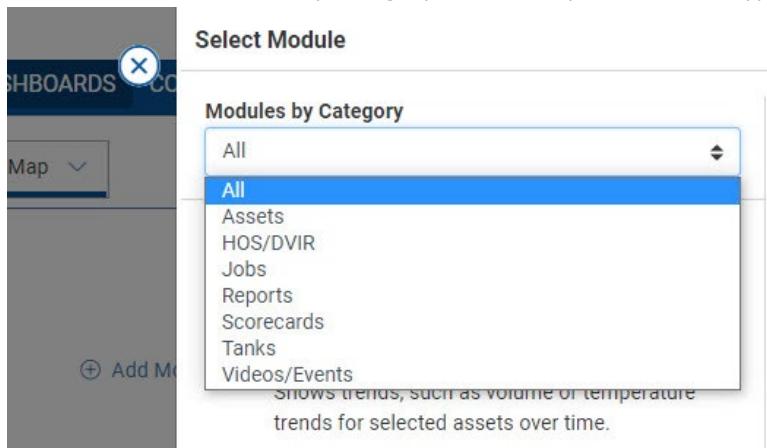
DVIR Violations
List of DVIR violations filtered by drivers over a selected duration.

Example: Asset Locations Map
No preview is available for this module at this time.

OneView™ Dashboards

Pedigree Technologies

You can use the Modules by Category filter to help decide what type of module to choose.

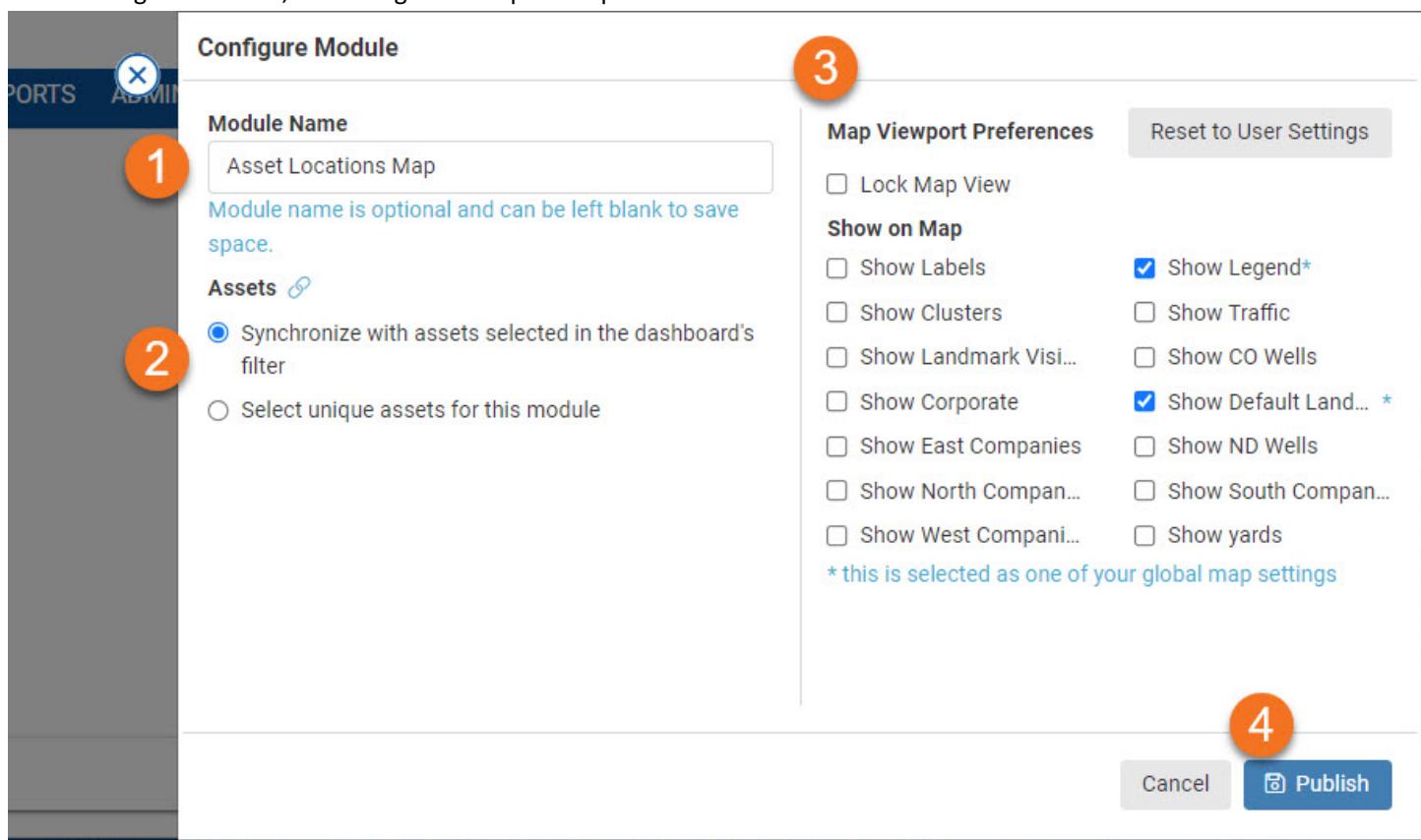


After selecting a module, choose Add Module in the lower right corner.



Module Configuration

After adding the module, the configuration options open.



Configure Module

1 **Module Name**
Asset Locations Map
Module name is optional and can be left blank to save space.

2 **Assets**
 Synchronize with assets selected in the dashboard's filter
 Select unique assets for this module

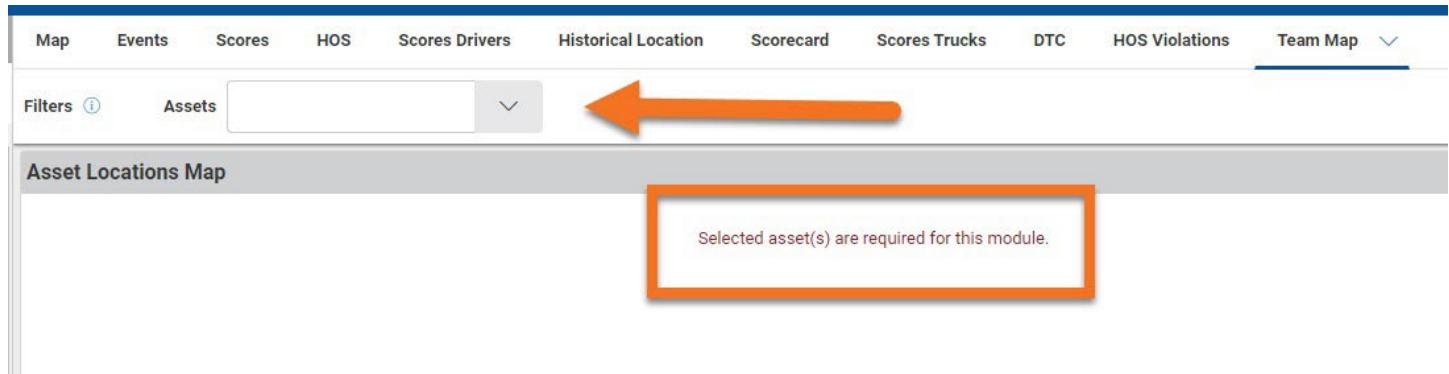
3 **Map Viewport Preferences**
 Lock Map View
Show on Map
 Show Labels Show Legend*
 Show Clusters Show Traffic
 Show Landmark Visi... Show CO Wells
 Show Corporate Show Default Land... *
 Show East Companies Show ND Wells
 Show North Compan... Show South Compan...
 Show West Compan... Show yards
* this is selected as one of your global map settings

4 **Cancel** **Publish**

1. **Module Name:** the name will default to the module name, but you can rename it.
2. **Assets:** There are top options for selecting assets.
 - a. **Synchronize with assets selected in the dashboard's filter** – this option is new, allowing you to set the asset selection the same across all modules that you add on the same tab.
 - b. **Select unique assets for this module** – this option allows you to set separate assets for this module than the main asset filter. It is useful when you add multiple modules to the same tab and want to filter them differently.
3. Every module will have different settings or preferences.
4. **Publish the Module** when you've completed the configuration settings.

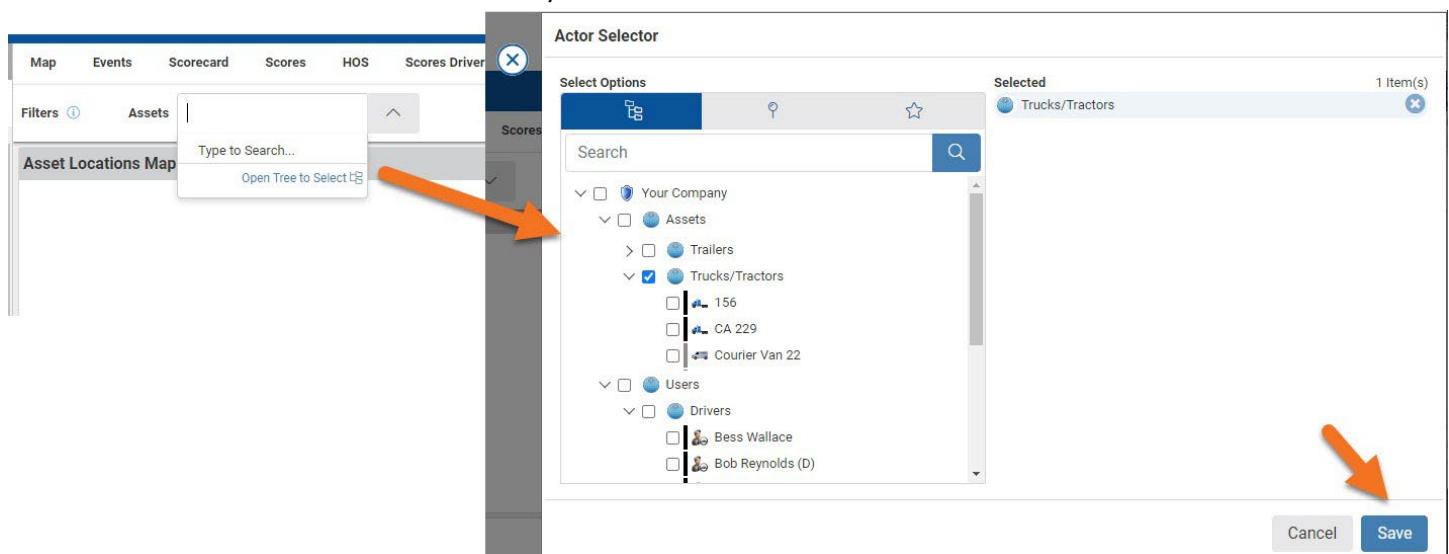
Assets Filter

After adding a module, if you've chosen to Synchronize with assets selected in the dashboard's filter (see a. above) you will notice a message reminding you to select assets in the main filter at the top of the dashboard area.



The screenshot shows the OneView™ Dashboards interface. At the top, there is a navigation bar with tabs: Map, Events, Scores, HOS, Scores Drivers, Historical Location, Scorecard, Scores Trucks, DTC, HOS Violations, and Team Map. Below the navigation bar is a search/filter bar with 'Filters' and 'Assets' fields. A large orange arrow points from the text 'Select the assets filter and either search or use your tree to select the assets for this module.' to the 'Assets' field. A message box with a red border and the text 'Selected asset(s) are required for this module.' is overlaid on the interface.

Select the assets filter and either search or use your tree to select the assets for this module. Then Save at the bottom.

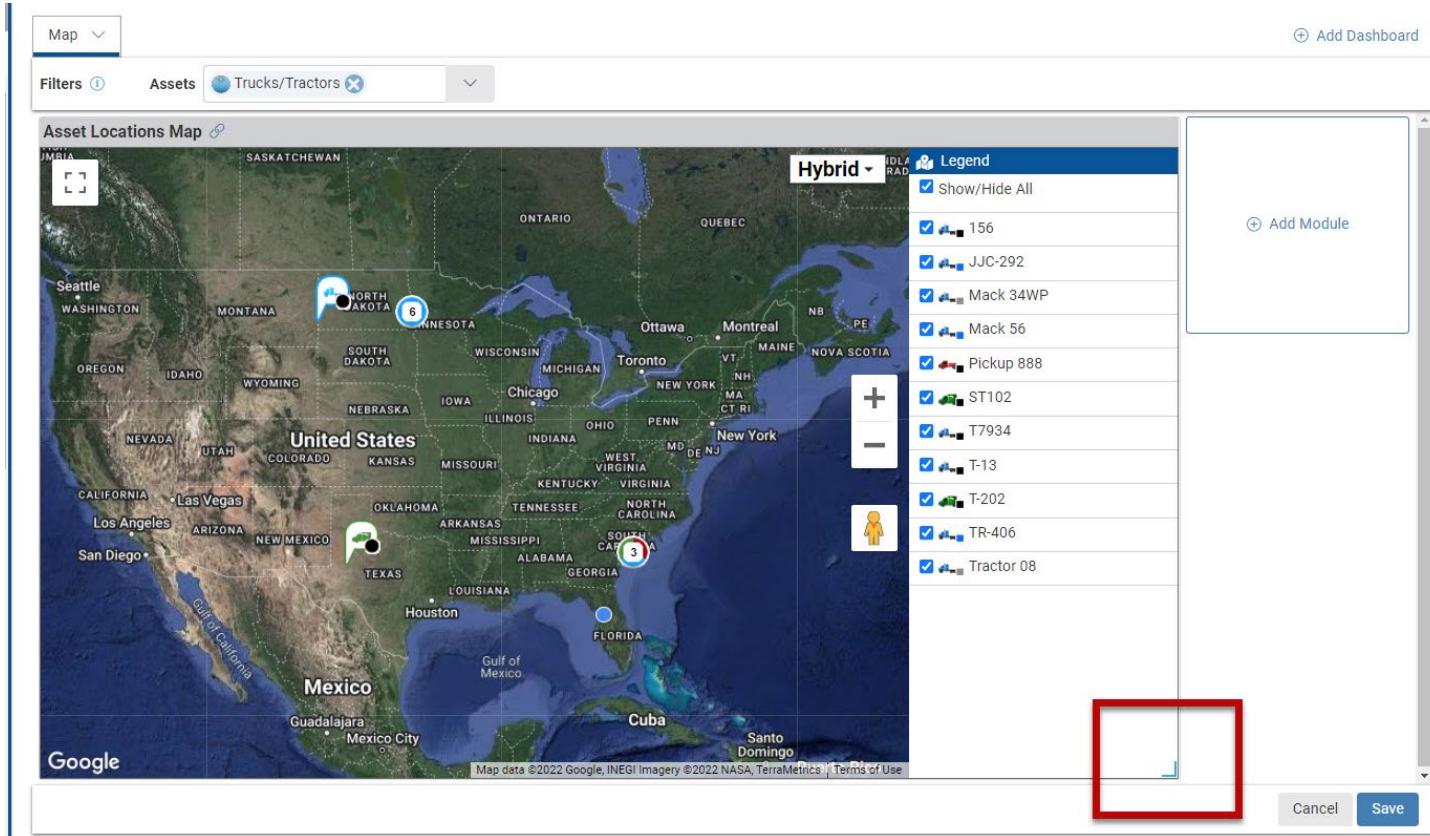


The screenshot shows the OneView™ Dashboards interface with the 'Assets' filter selected. A modal dialog box titled 'Actor Selector' is open, showing a tree view of assets. The 'Trucks/Tractors' node is selected, indicated by a checked checkbox. An orange arrow points from the text 'Select the assets filter and either search or use your tree to select the assets for this module.' to the 'Assets' field in the filter bar. Another orange arrow points from the 'Save' button in the bottom right corner of the dialog box to the 'Save' button in the main interface.

After Saving your asset selection and adding a module, you're not done. You will still need to publish your page.

Publish

When you add a module, it may snap to the entire page or it may not. You can resize any module in the lower right corner of the module.



Hover over the lower right corner of the module you've added until your mouse changes to a double arrow. You may then drag the corner of the module to fill up the entire space of your dashboard tab. (See next section for adding multiple modules on the same tab.)

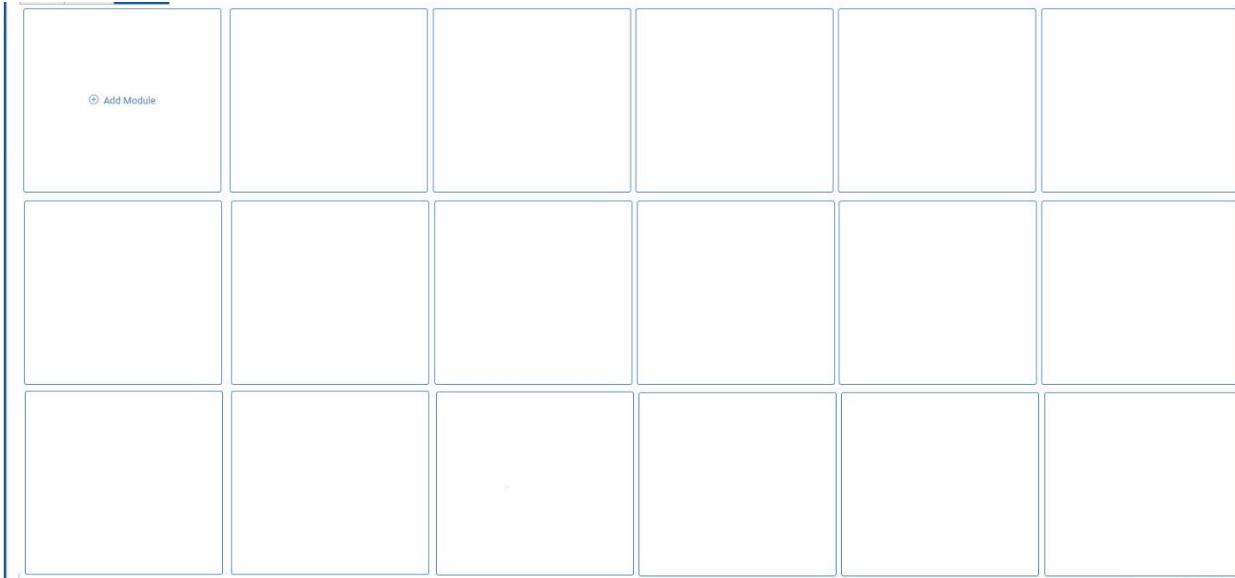


When you're done, you must click Save to finalize your dashboard and publish it. (If you don't see the blue corner icon shown above, you probably already clicked save. To get back to edit mode, go to the tab that you're on at the top of the page and click the arrow next to the tab name. Choose Edit Dashboard. You can only resize while still in edit mode.)

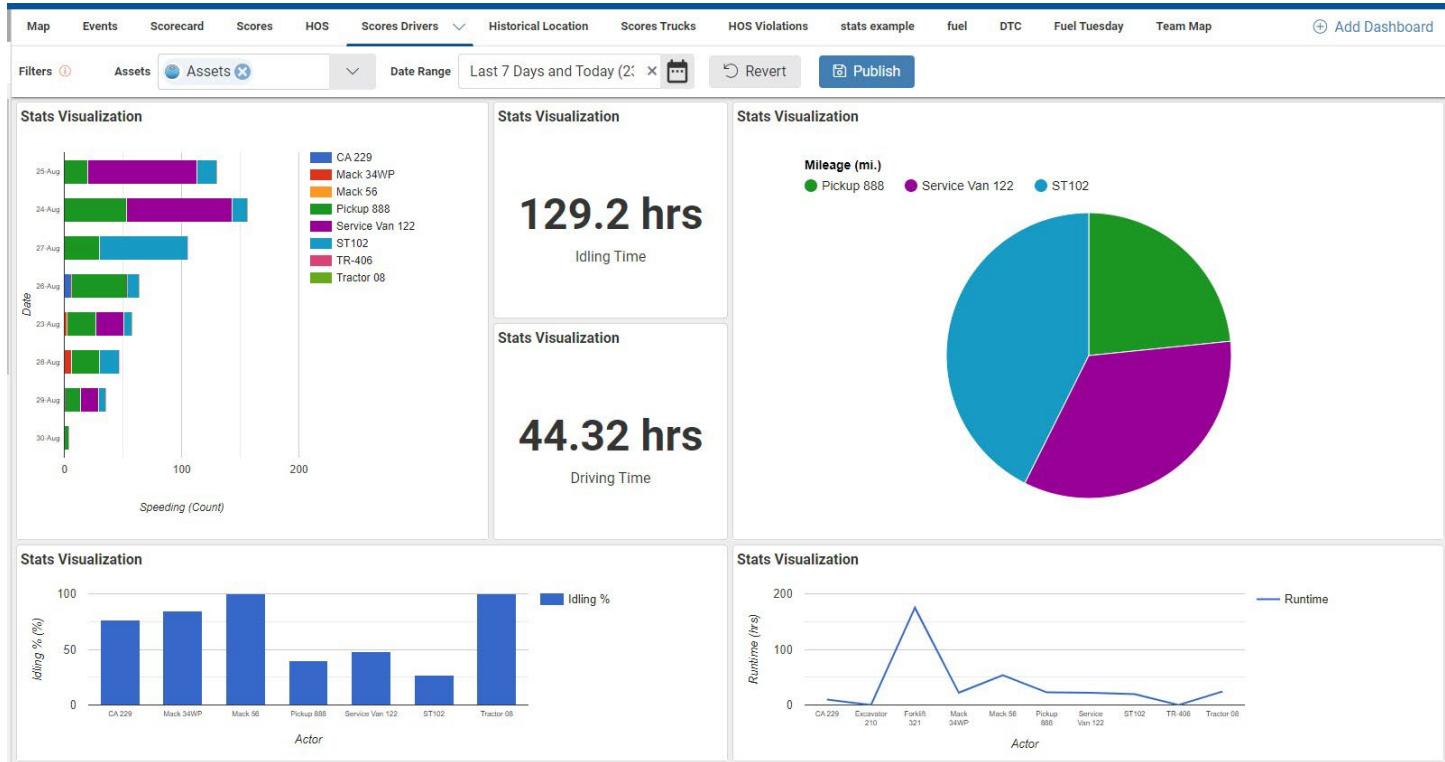
Multiple Modules on One Dashboard

Adding multiple modules on a single dashboard tab can be done easily. The dashboard area is a grid that can easily fit multiple modules. The grid is divided up into three rows and six columns.

Grid Visual (you will only see one square to add a module when you're looking at your dashboard tab. This image is for visualization only.)



Modules can be snapped into those grid areas in any combination of sizes like the example below.



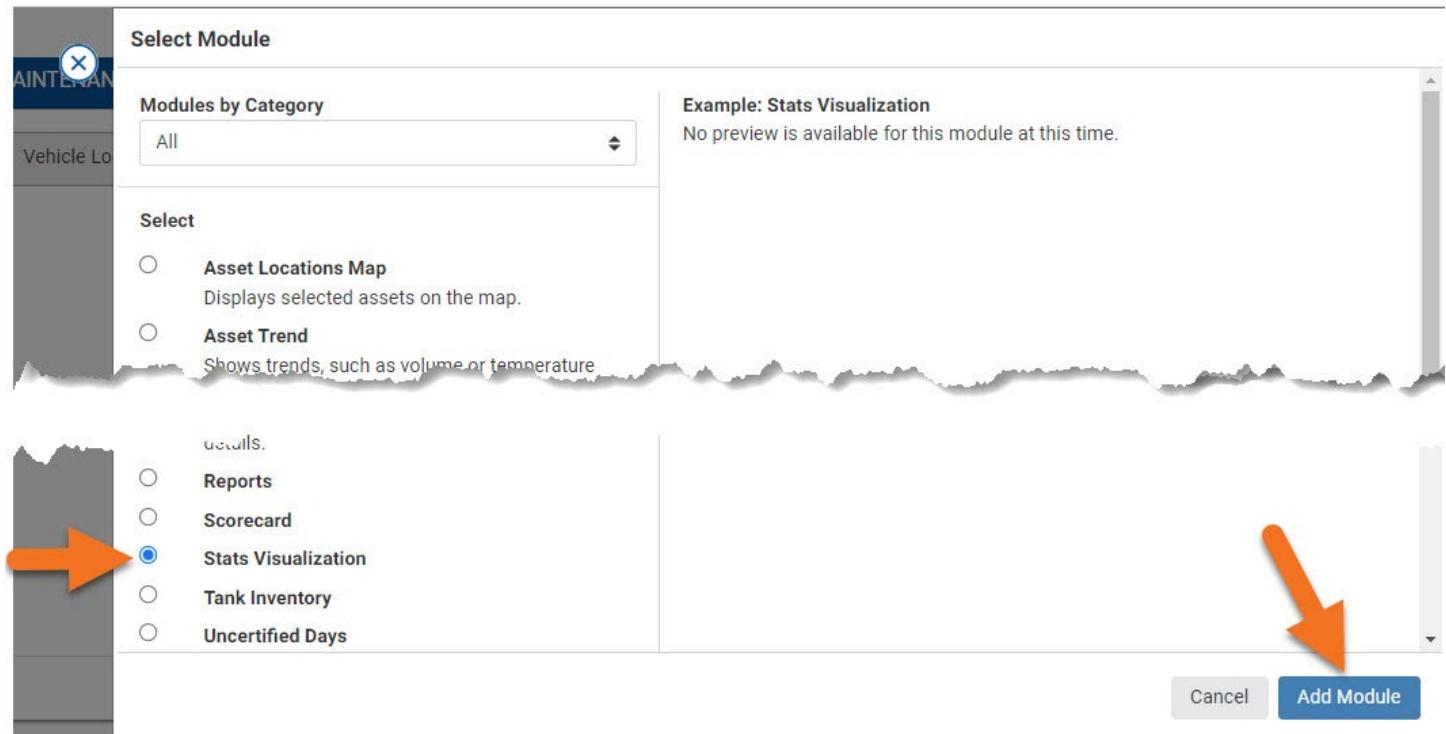
Add Module

After adding a new tab, (see Adding Dashboard Tabs at the beginning of this document) click on the link for Add Module in your dashboard area.



Select Module

From the list of modules available, click the radio button next to the module you want to add. Then **Add Module** in the lower right corner.



Configure Module

The module you choose will need configuring and the Configure Module window will open after clicking Add Module. Each module will have different options. The module shown below is the Stats Visualization. The one you choose may be different.

1
Configure Module

Module Name
 Module name is optional and can be left blank to save space.

Assets Sync
 Synchronize with assets selected in the dashboard's filter
 Select unique assets for this module

Date Range Sync
 Synchronize with date range selected in the dashboard's filter
 Select unique date range for this module

Visualization


 Bar Chart


 Stacked Bar Chart


 Column Chart


 Stacked Column Chart


 Line Chart


 Number Card


 Pie Chart


 Scatter Chart


 Table

Visualizations have different associated option selections in the right pane. Selecting a different visualization may result in the loss of options selected.

1. Module Name: you can leave the default module name or rename as desired.

2. Assets: Choose between two options, to use the main filter on the dashboard tab to control the assets selected for this module
or
select a unique set of assets just for this one module – separate from the main filter

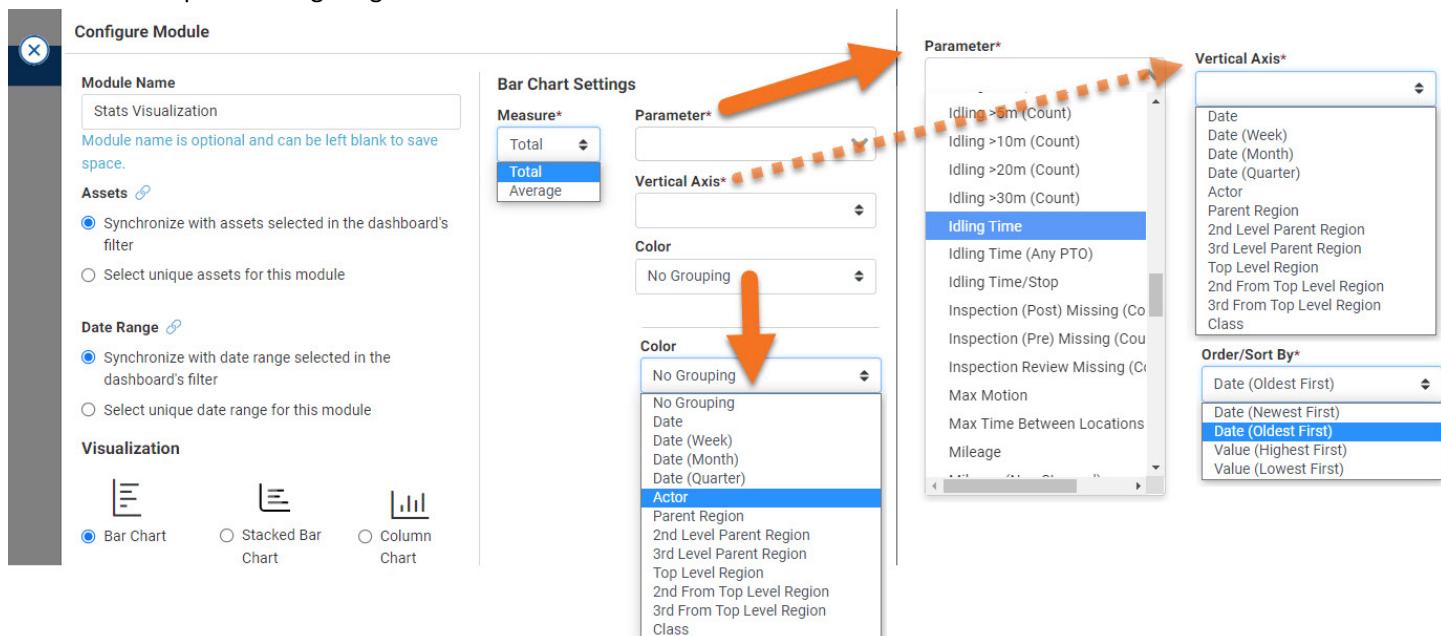
3. Date Range: If the module requires a date range, you have the option of tying it to the main filter on the tab or choosing a separate date range just for this module.

4. Visualization: unique to this selected module, there are different charts, graphs, tables, and data displays that you can choose. Every module will be different and may not have an additional section like this to configure.

Cancel
Publish

9

After choosing the options you want, there may be more sections to configure on the right side. It depends on the module. Here's an example of configuring the Stats Visualization bar chart.



Configure Module

Module Name: Stats Visualization
 Module name is optional and can be left blank to save space.

Assets:
 Synchronize with assets selected in the dashboard's filter
 Select unique assets for this module

Date Range:
 Synchronize with date range selected in the dashboard's filter
 Select unique date range for this module

Visualization:
 Bar Chart Stacked Bar Chart Column Chart

Bar Chart Settings

Measure*: Total
 Parameter*: Idling Time
Vertical Axis*: Date
Order/Sort By*: Date (Oldest First)

Color: Actor

Vertical Axis*:
 Date
 Date (Week)
 Date (Month)
 Date (Quarter)
 Actor
 Parent Region
 2nd Level Parent Region
 3rd Level Parent Region
 Top Level Region
 2nd From Top Level Region
 3rd From Top Level Region
 Class

Bar Chart Final Settings:

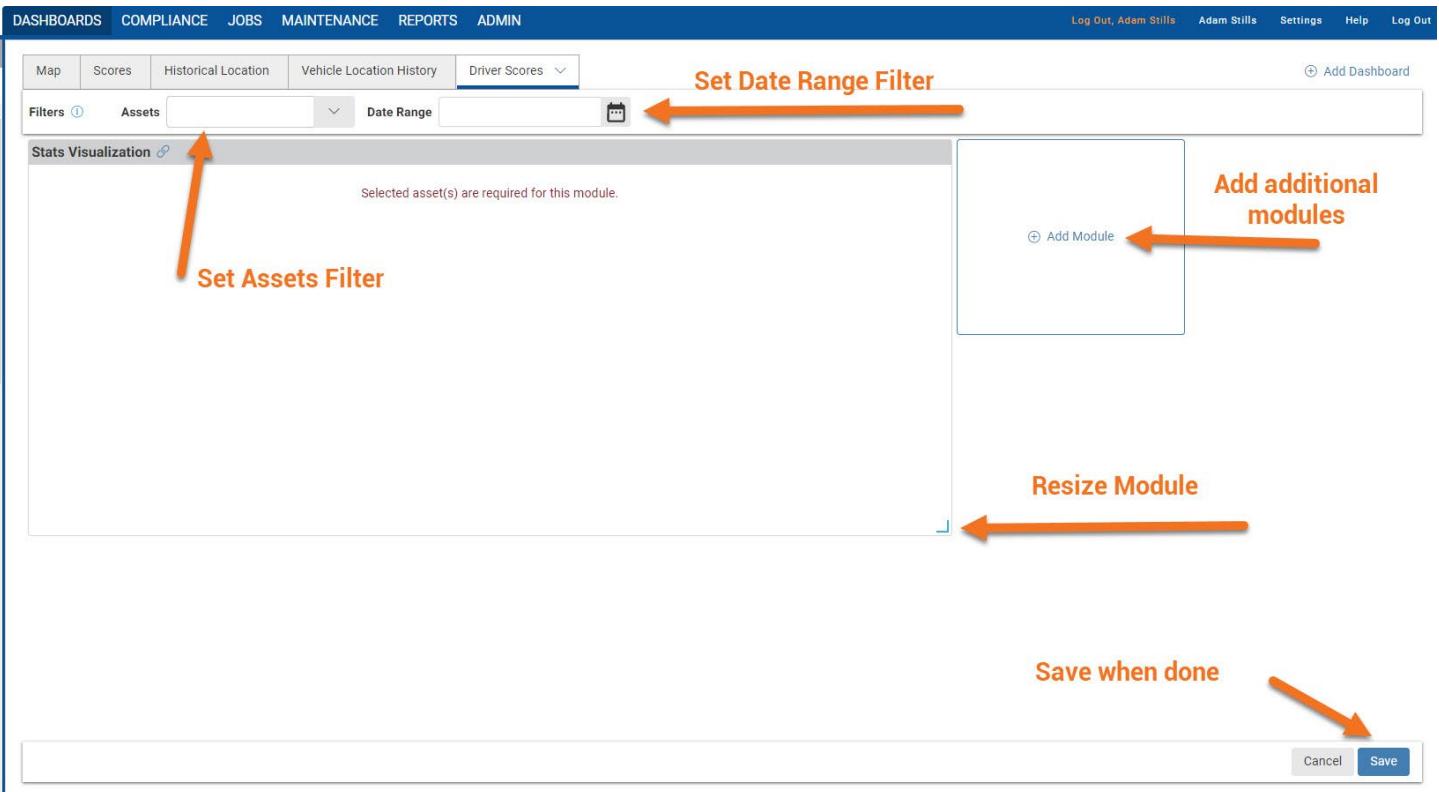
Bar Chart Settings

Measure*: Total
Parameter*: Idling Time
Vertical Axis*: Date
Order/Sort By*: Date (Oldest First)

Color: Actor

After choosing your settings, click on Publish in the lower right corner.





Once you've added your first module, you will need to make additional adjustments:

Assets Filter: if you've tied the module to synchronize with the main filter, add your assets/drivers. The module will be empty until you add assets to this filter.

Date Range: if the module you've added is tied to the main date range filter, you will have to add a date range or the filter will remain empty of results

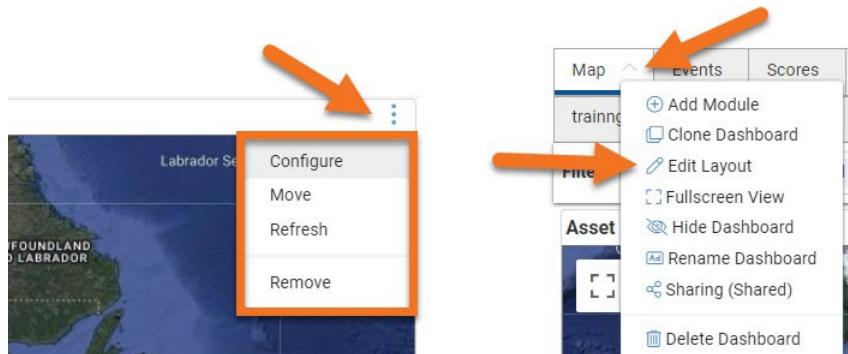
Add Module: you can use the add module link to continue adding modules

Resize Module: you can hover over the small blue corner icon in the lower right corner of the module you've added to resize it on the page. It will snap to the grid as shown previously.

Save: after adding modules, resizing and choosing everything you want to include on this page, click on Save in the lower right corner. **Note:** *if you leave this tab before saving, any changes, additions, unsaved modules will be deleted.*

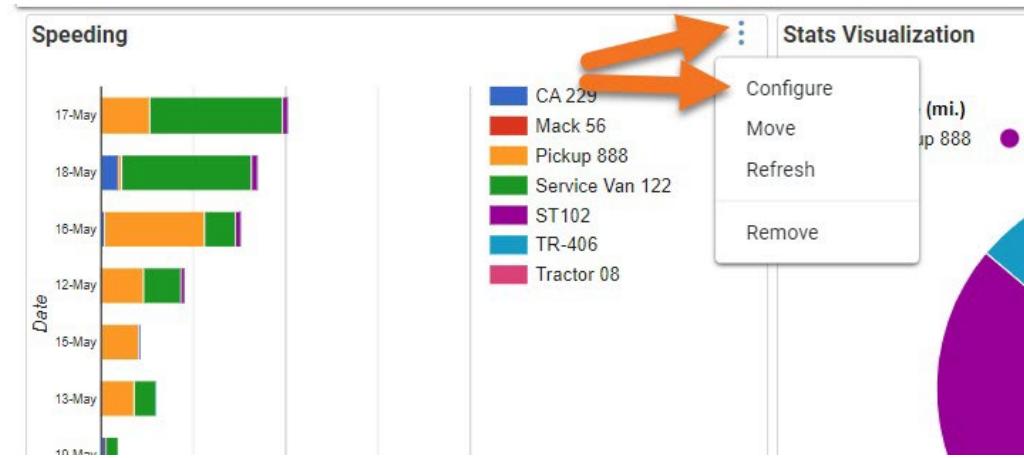
Edit Dashboard

After saving a dashboard, you can use the module's **configure** to make changes, or if you want to edit the layout, rearrange modules and add new modules, etc., you will have to enter the **edit dashboard** mode.



Edit Configuration

The modules have an ellipsis menu in the top right corner of the module. Click there to find a configure option.



The original configuration of the module will appear on the right and you can make any changes needed:

Configure Module

Module Name
Stats Visualization
Module name is optional and can be left blank to save space.

Assets
 Synchronize with assets selected in the dashboard's filter
 Select unique assets for this module
Assets

Date Range
 Synchronize with date range selected in the dashboard's filter
 Select unique date range for this module
Last 7 Days and Today

Visualization

Stacked Bar Chart Settings

Measure* Average Parameter* Speeding (Count)

Vertical Axis* Date Order/Sort By Value (Highest First)

Limit

Color* Actor

Visualizations have different associated option

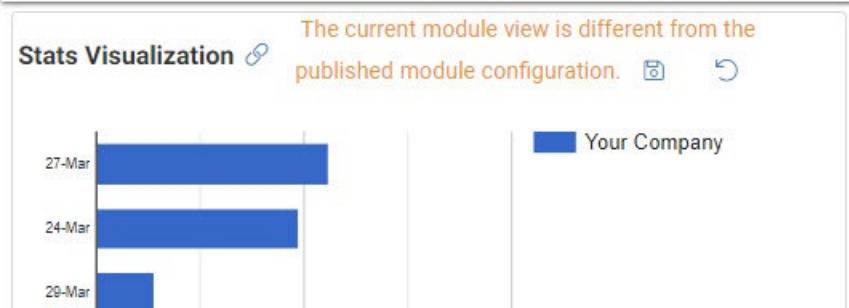
Cancel Apply Publish

After making changes, there are two options in the lower corner to choose, either to apply or publish.

[Cancel](#) [Apply](#) [Publish](#)

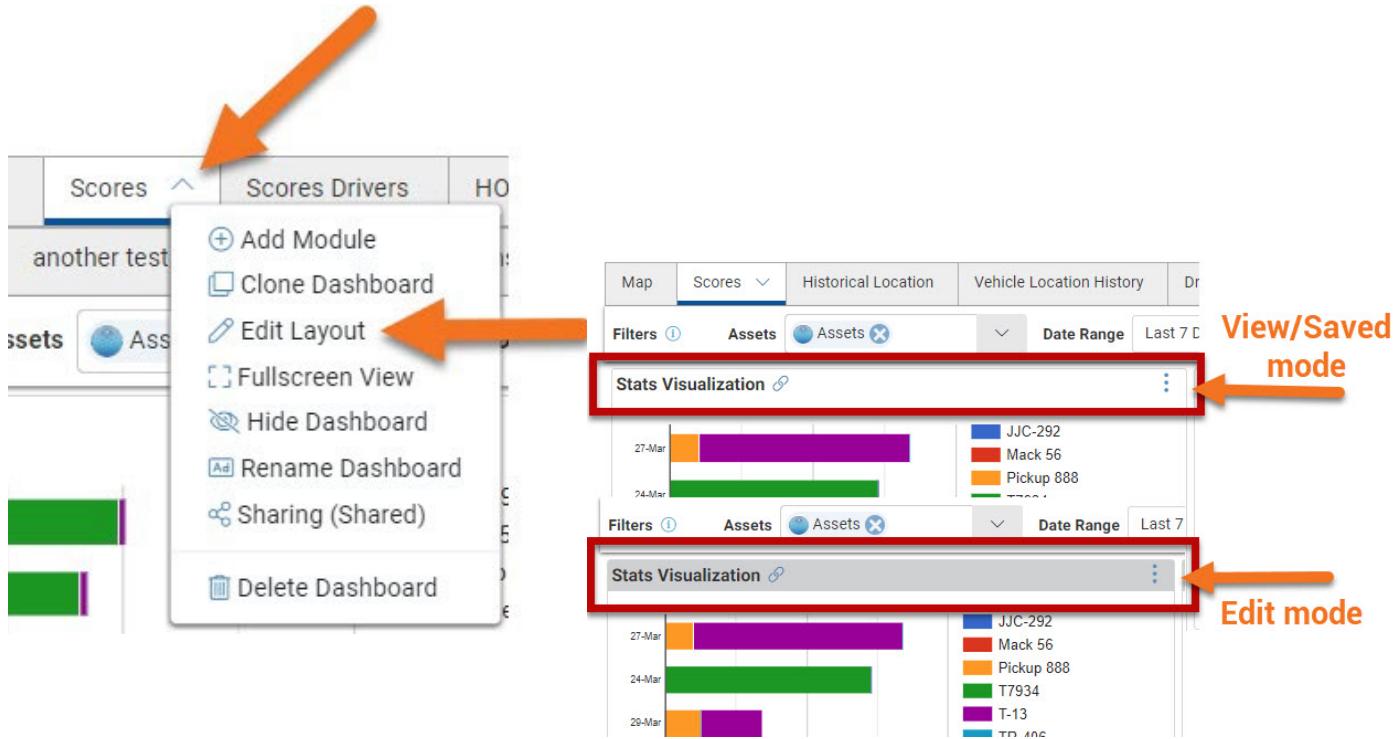
Apply

Use apply when you want to see the changes before making a decision to make them permanent. You will see the changes in the module and a note reminding you that these changes are not yet saved/published. Use the Save icon (floppy disc) to publish these changes, or use the revert arrow (circle shaped arrow) to go back to the previous settings.



Edit Layout of Dashboard

If you want to change out some modules, or resize modules on your dashboard, you will need to be in edit mode. You can tell if you're in edit mode because the modules will have a gray header instead of a white header. To enter edit mode, click on the arrow next to the tab name at the top of the dashboard you want to change. Choose Edit Dashboard from the menu.



Clone Dashboard

You may want to create multiple dashboards with the same module, but different asset selections, like one for trucks and one for drivers, or one for each division. Cloning makes this process easy.

Use the dropdown arrow on the tab you want to clone and choose **Clone Dashboard**.

The screenshot shows the Scores Drivers module. At the top, there are tabs: Map, Events, Scores, HOS, Scores Drivers, and a dropdown menu labeled 'More'. Below the tabs is a filter section for 'Assets' with a 'Assets' button. To the right of the filter are buttons for 'Revert' and 'Publish'. A date range selector shows 'Last 7 Days and Today (2)' with a calendar icon. The main area contains a 'Stats Visualization' chart showing driving time by date, with a total of '44.32 hrs' displayed. To the right is a pie chart showing mileage distribution. A context menu is open over the chart, with the 'Clone' option highlighted by a red box.

Next you will see the option to name the new dashboard. It will default to the dashboard name + clone. Change it as needed.

The image shows two side-by-side 'Clone Dashboard' dialog boxes. Both dialogs have a header 'Clone Dashboard' with a close button. The text 'Creating a clone allows you to add or remove modules and save changes.' is present. In the first dialog, the 'Name*' field contains 'Scores Clone' and has an orange arrow pointing to it. In the second dialog, the 'Name*' field contains 'Scores Drivers' and has an orange arrow pointing to it. Both dialogs have 'Cancel' and 'Save' buttons at the bottom.

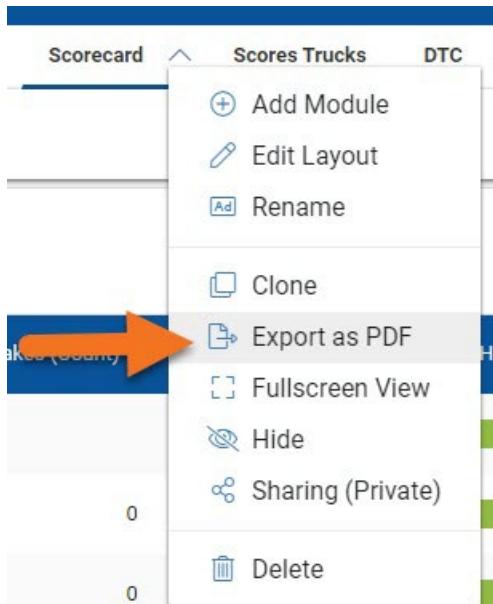
Change Filters or Configs

The filters and configurations will also be cloned at first. Change them as needed to add the different assets for this new dashboard and then Publish.

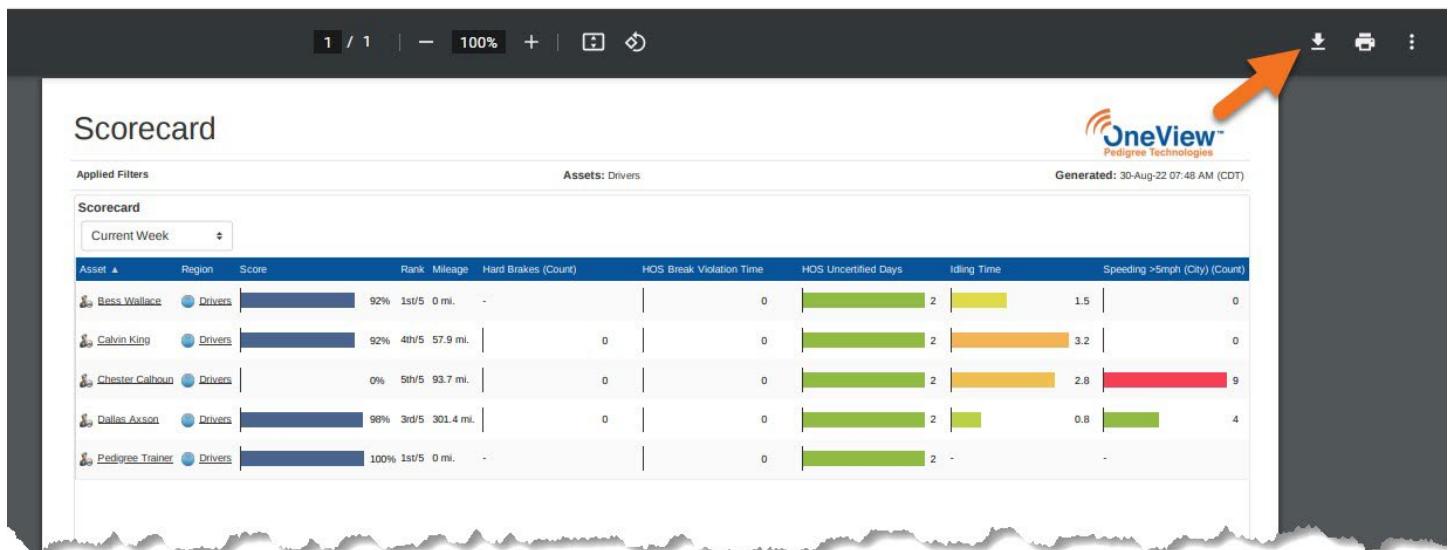
The screenshot displays three parallel dashboards. The top navigation bar is highlighted with a red box, showing 'Filters 1 Assets 2 selected Date Range Last 7 Days and Today (2) Revert Publish'. The middle dashboard features a 'Stats Visualization' chart for 'Pickup 888: 40 count' with a date range from 27-Mar to 31-Mar. The right dashboard shows a pie chart for 'Mileage (mi.)' with categories JJC-292, Pickup 888, T7934, and T-13.

Export Dashboard as PDF

Each of your dashboards can be exported as a pdf. Use the dropdown menu from the dashboard tab and choose Export as PDF



In the pdf window that appears, you can zoom in and out from your browser, or use the download icon to save this pdf to your computer.



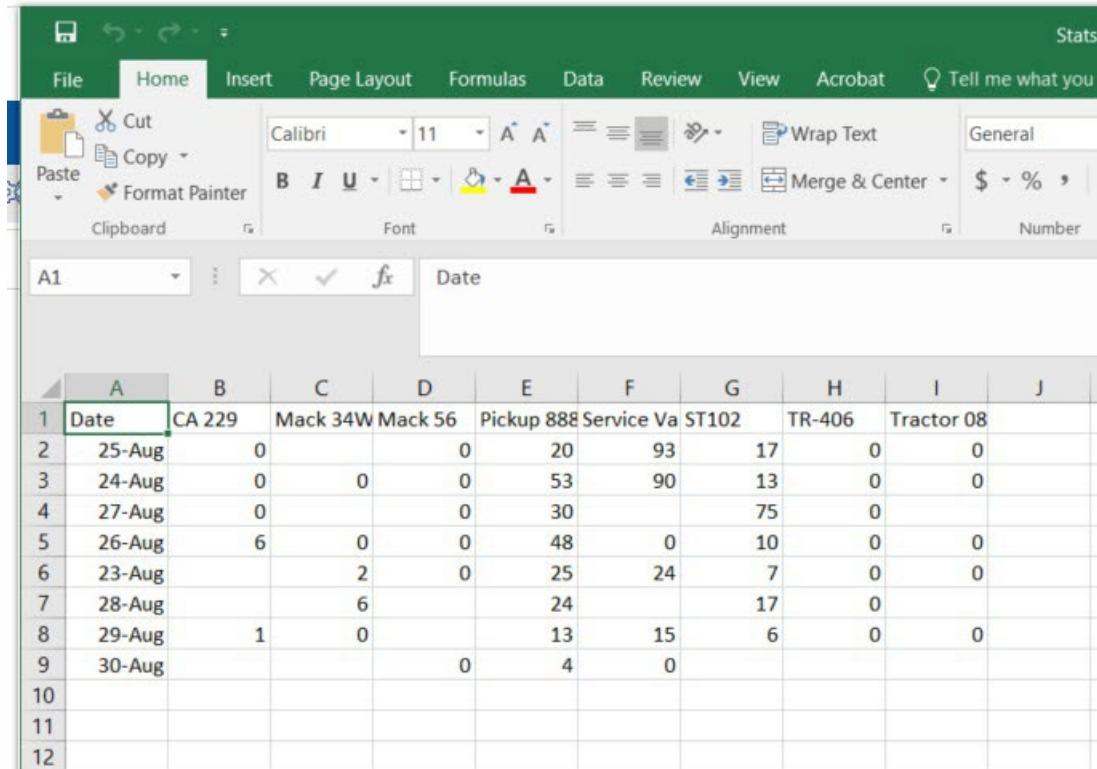
| Asset | Region | Score | Rank | Mileage | Hard Brakes (Count) | HOS Break Violation Time | HOS Uncertified Days | Idling Time | Speeding >5mph (City) (Count) |
|------------------|---------|-------|-------|-----------|---------------------|--------------------------|----------------------|-------------|-------------------------------|
| Bess Wallace | Drivers | 92% | 1st/5 | 0 mi. | - | 0 | 2 | 1.5 | 0 |
| Calvin King | Drivers | 92% | 4th/5 | 57.9 mi. | 0 | 0 | 2 | 3.2 | 0 |
| Chester Calhoun | Drivers | 0% | 5th/5 | 93.7 mi. | 0 | 0 | 2 | 2.8 | 9 |
| Dallas Axson | Drivers | 98% | 3rd/5 | 301.4 mi. | 0 | 0 | 2 | 0.8 | 4 |
| Pedigree Trainer | Drivers | 100% | 1st/5 | 0 mi. | - | 0 | 2 | - | - |

Export to CSV

The modules you have on your dashboards can be downloaded as a csv. Click on the ellipsis menu on the top right of the module. Choose Export to CSV.



The CSV will download to your computer where you can save it.

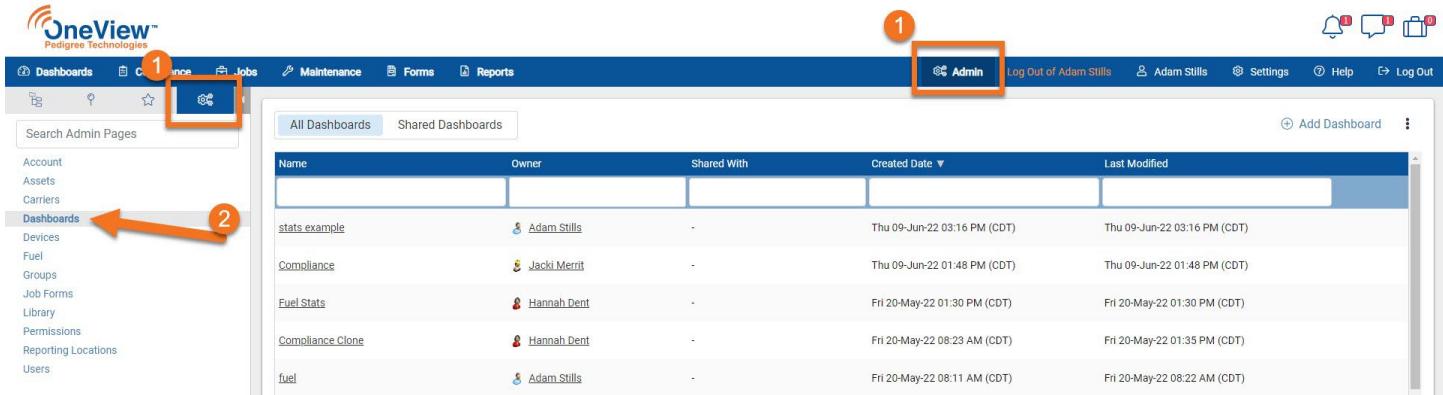


| | A | B | C | D | E | F | G | H | I | J |
|----|--------|--------|-----------|---------|------------|------------|-------|--------|------------|---|
| 1 | Date | CA 229 | Mack 34WP | Mack 56 | Pickup 888 | Service Va | ST102 | TR-406 | Tractor 08 | |
| 2 | 25-Aug | 0 | | 0 | 20 | 93 | 17 | 0 | 0 | |
| 3 | 24-Aug | 0 | 0 | 0 | 53 | 90 | 13 | 0 | 0 | |
| 4 | 27-Aug | 0 | | 0 | 30 | | 75 | 0 | | |
| 5 | 26-Aug | 6 | 0 | 0 | 48 | 0 | 10 | 0 | 0 | |
| 6 | 23-Aug | | 2 | 0 | 25 | 24 | 7 | 0 | 0 | |
| 7 | 28-Aug | | 6 | | 24 | | 17 | 0 | | |
| 8 | 29-Aug | 1 | 0 | | 13 | 15 | 6 | 0 | 0 | |
| 9 | 30-Aug | | | 0 | 4 | 0 | | | | |
| 10 | | | | | | | | | | |
| 11 | | | | | | | | | | |
| 12 | | | | | | | | | | |

Dashboard Admin

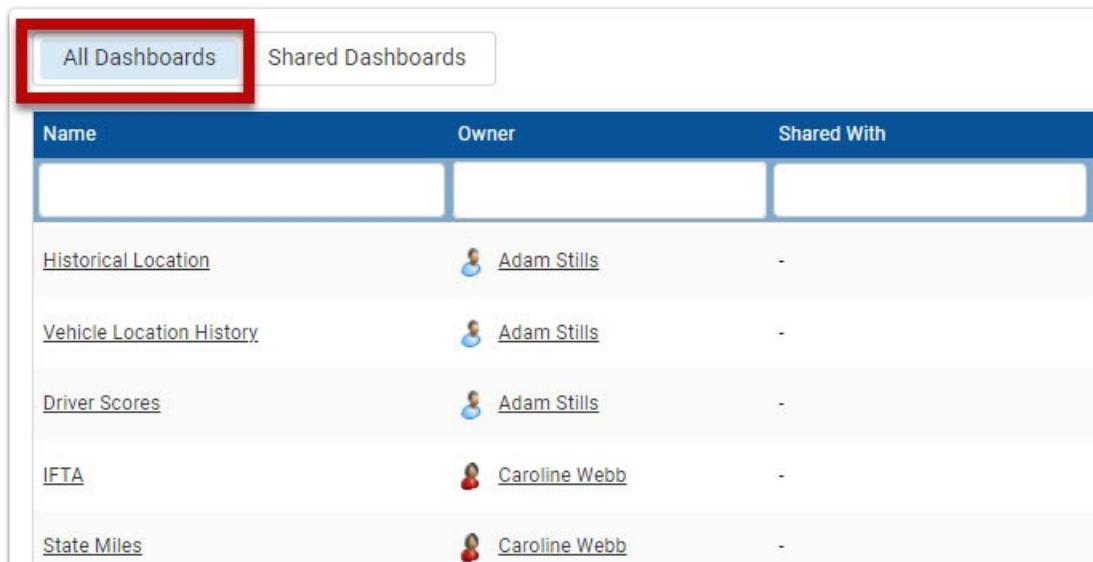
New to dashboards is the ability for your company to have dashboard administrators. It can be giving to the Admin group or other user group. This feature allows the dashboard admin to manage all users' dashboards including setting up dashboards for other users, cloning a user's dashboard and assigning it out to another user or group of users, deleting and making changes necessary so your entire team has just what they need on their dashboard area.

To get to the dashboard admin area, 1) click on the Admin tab at the top, and then 2) the Dashboards sub-tab.



The screenshot shows the OneView™ Dashboards interface. At the top, there is a navigation bar with tabs: Dashboards, Compliance, Jobs, Maintenance, Forms, and Reports. The 'Admin' tab is highlighted with a red box and a circled '1'. Below the navigation bar is a secondary menu with a search bar ('Search Admin Pages') and a sidebar containing links like Account, Assets, Carriers, and Dashboards (which is also highlighted with a red box and a circled '2'). The main content area displays a table titled 'All Dashboards' with columns: Name, Owner, Shared With, Created Date, and Last Modified. The table lists several dashboards, such as 'stats example', 'Compliance', 'Fuel Stats', 'Compliance_Clone', and 'fuel', along with their respective owners and creation dates.

Here you will see buttons to view either All Dashboards which will show each dashboard every user has, or Shared Dashboards which will show the dashboards that are shared with other users.

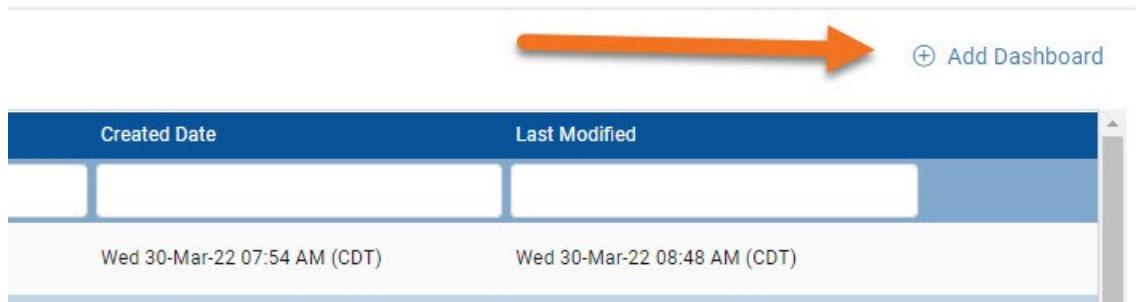


This screenshot shows the 'All Dashboards' view. At the top, there are two buttons: 'All Dashboards' (which is highlighted with a red box) and 'Shared Dashboards'. Below this is a table with columns: Name, Owner, and Shared With. The table lists five dashboards: 'Historical Location' owned by Adam Stills, 'Vehicle Location History' owned by Adam Stills, 'Driver Scores' owned by Adam Stills, 'IFTA' owned by Caroline Webb, and 'State Miles' owned by Caroline Webb.

| All Dashboards | Shared Dashboards |
|------------------------|-------------------|
| | |
| Map | Adam Stills |
| Scores | Adam Stills |

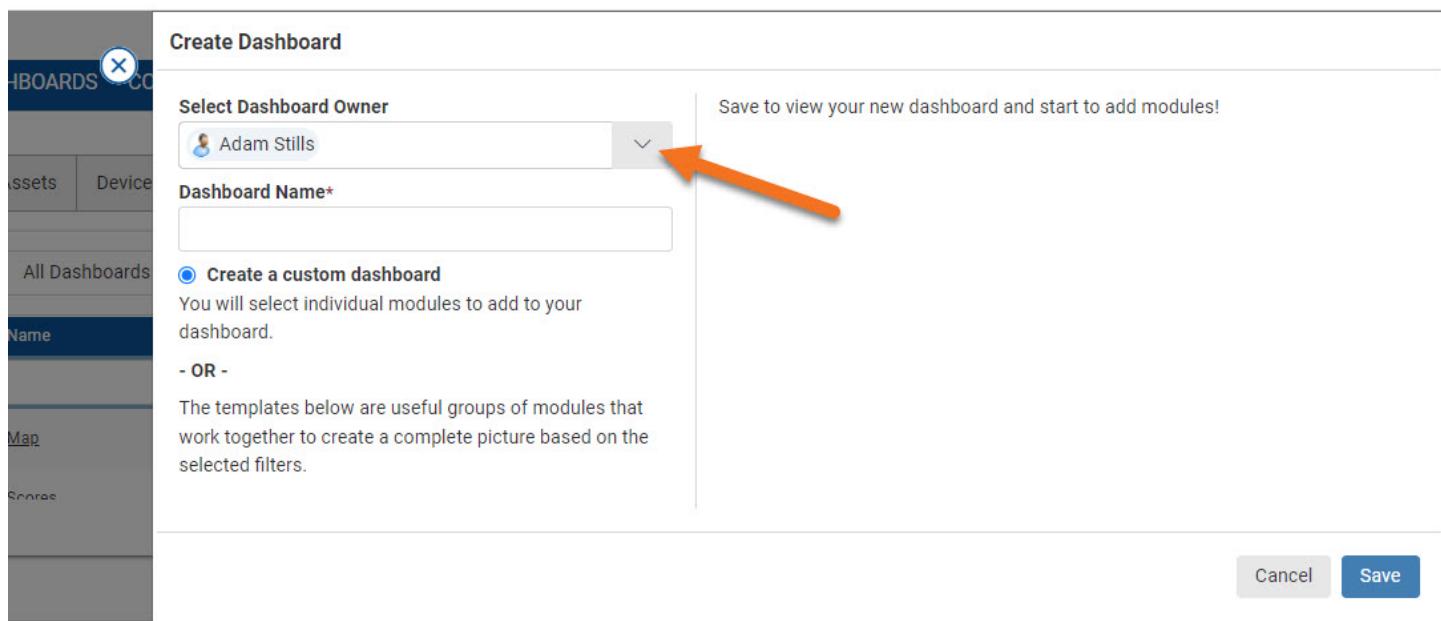
Admin - Create a Dashboard for another User

Dashboard admins can create new dashboards for any user in your company. On the Dashboard Admin tab, use the (+) Add Dashboard link on the far right to start a new dashboard that can be assigned to any user.



Assign Ownership

In the Create Dashboard window where you normally just name the dashboard, you will also have an ownership field where you can choose any of your users to own the dashboard. This will add your newly created dashboard to their user account.



Create this user's new dashboard just like you would on your own account except it will be in a slide out window.

OneView™ Dashboards

Pedigree Technologies

1 Choose the Owner, Name the Dashboard and then Save.

Create Dashboard

Select Dashboard Owner
Eric Dawson

Dashboard Name*
Maintenance Schedule

Create a custom dashboard
You will select individual modules to add to your dashboard.
- OR -
The templates below are useful groups of modules that work together to create a complete picture based on the selected filters.

Cancel **Save**

2 Click on (+) Add Module

Maintenance Schedule

+ Add Module

Cancel **Save**



OneView™ Dashboards

Pedigree Technologies

3 select the first module you would like to add from the list of options and then choose Add Module at the bottom.

The screenshot shows the 'Select Module' dialog box. On the left, there's a vertical sidebar with a close button ('X') at the top, followed by sections for 'Device' and 'Dashboards'. The main area has a title 'Select Module' and a dropdown menu 'Modules by Category' set to 'All'. Below this, under the heading 'Select', there are several options with descriptions:

- Asset Locations Map
Displays selected assets on the map.
- Asset Trend
Shows trends, such as volume or temperature trends for selected assets over time.
- HOS Summary
- HOS Violations
- Jobs List
A filterable, sortable table of jobs showing most details.
- Reports
- Scorecard
- Stats Visualization

At the bottom right are two buttons: 'Cancel' and 'Add Module'.

4 Configure the module as needed and then Publish (All modules will require different configurations and may not be the same as the one pictured here.)

The screenshot shows the 'Configure Module' dialog box. On the left, there's a vertical sidebar with a close button ('X') at the top. The main area has a title 'Configure Module' and a section for 'Module Name' with a text input field containing 'Jobs List'. A note below says 'Module name is optional and can be left blank to save space.' Under the heading 'Assets' is a list of options:

- Synchronize with assets selected in the dashboard's filter
- Select unique assets for this module

At the bottom right are two buttons: 'Cancel' and 'Publish'.

OneView™ Dashboards

Pedigree Technologies

5 Once the first module is added, choose the top filters if necessary, then resize if needed and add any other modules desired. Save when you are done and the dashboard will appear on the assigned user's dashboard area.

The screenshot shows the 'Maintenance Schedule' module configuration screen. At the top, there are 'Filters' and 'Assets' buttons with a dropdown arrow between them. An orange arrow points to the dropdown arrow. Below this is a table titled 'Jobs List' with columns: Status, ID, Name, Description, Type, Target, Assignee, Due Date, and Start Date. The table contains several rows of maintenance jobs. At the bottom of the table, there are page navigation controls (Page 1 of 12, Showing 1-25 of 283, Records Per Page 25, and arrows) and a 'Save' button. To the left of the table, there is a placeholder box labeled '(+) Add Module'. Orange arrows point from the left towards the 'Add Module' box and from the right towards the 'Save' button.

Admin – View/Edit Dashboards of Other Users

Dashboard admins can click on the dashboard from the list in the Dashboards Admin area to view an individual's dashboard or view a shared dashboard.

The screenshot shows the 'Dashboards Admin' area. At the top, there are tabs for 'All Dashboards' and 'Shared Dashboards'. Below is a table with columns: Name, Owner (with a dropdown arrow), Shared With, and Created Date. The table lists four dashboards: 'Scorecard', 'HOS Violations', 'DVR', and 'Maintenance Schedule'. An orange arrow points to the 'Scorecard' row. Another orange arrow points to the 'Save' button in the bottom right corner of the dashboard preview area.

| Name | Owner ▾ | Shared With | Created Date |
|--------------------------------------|---------------|-------------|------------------------------|
| Scorecard | George Monroe | - | Fri 01-Apr-22 08:24 AM (CDT) |
| HOS Violations | George Monroe | - | Fri 01-Apr-22 08:26 AM (CDT) |
| DVR | George Monroe | - | Fri 01-Apr-22 08:34 AM (CDT) |
| Maintenance Schedule | Eric Dawson | - | Fri 01-Apr-22 09:29 AM (CDT) |

OneView™ Dashboards

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When the dashboard appears on the screen it will be in edit mode. You can make any changes needed, to the main filter(s), to the module(s) configuration, resize modules, add any new modules, and save your changes. These changes will take effect on the user's dashboard.

Scorecard

Filters *i* Assets 2 selected ▾

Scorecard Current Month

Idling Time Speeding % >10mph Speeding % >20mph

B+ 89% 6.0 0.9 0.0

↓ 6% from Previous Month (A) Goal < 0 hrs Goal < 0 % Goal < 0 %

| Asset ▲ | Region | Score | Rank | Idling Time | Speeding % >10mph | Speeding % >20mph |
|-------------|-----------------|-------|------|-------------|-------------------|-------------------|
| Adam Stills | Office Users | 99% | - | 1.4 | 0 | 0 |
| JJC-292 | Trucks/Tractors | 99% | - | 1.4 | 0 | 0 |
| Mack 56 | Trucks/Tractors | 97% | - | 2.8 | 0 | 0 |
| Pickup 888 | Vehicles | 53% | - | 0.5 | 4.6 | 0 |
| TR-406 | Trucks/Tractors | 100% | - | 0 | 0 | 0 |

+ Add Module

Cancel Save

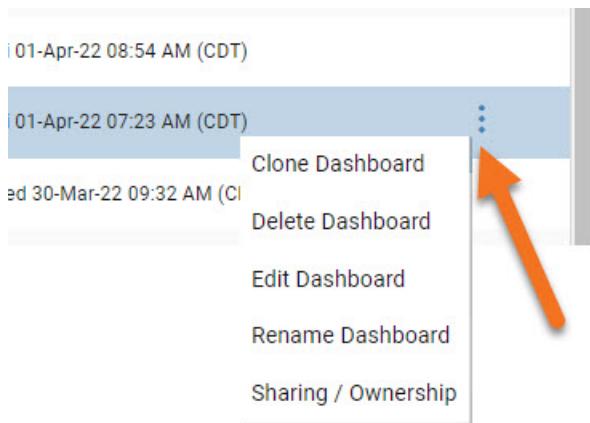
If you want to do more than just edit the user's dashboard, there is a more menu if you mouse over the right end of the dashboard list.

| All Dashboards | Shared Dashboards | + | Add Dashboard | |
|--------------------------|-------------------|-----------------|------------------------------|------------------------------|
| Name | Owner | Shared With | Created Date | Last Modified |
| Map | Adam Stills | Users | Wed 30-Mar-22 07:54 AM (CDT) | Fri 01-Apr-22 08:58 AM (CDT) |
| Scores | Adam Stills | HOS Annotations | Wed 30-Mar-22 08:49 AM (CDT) | Fri 01-Apr-22 08:54 AM (CDT) |
| Historical Location | Adam Stills | - | Wed 30-Mar-22 09:23 AM (CDT) | Fri 01-Apr-22 07:23 AM (CDT) |
| Vehicle Location History | Adam Stills | - | Wed 30-Mar-22 09:23 AM (CDT) | Wed 30-Mar-22 09:32 AM (CDT) |

⋮

- Clone Dashboard
- Delete Dashboard
- Edit Dashboard
- Rename Dashboard
- Sharing / Ownership

This more menu has multiple options.

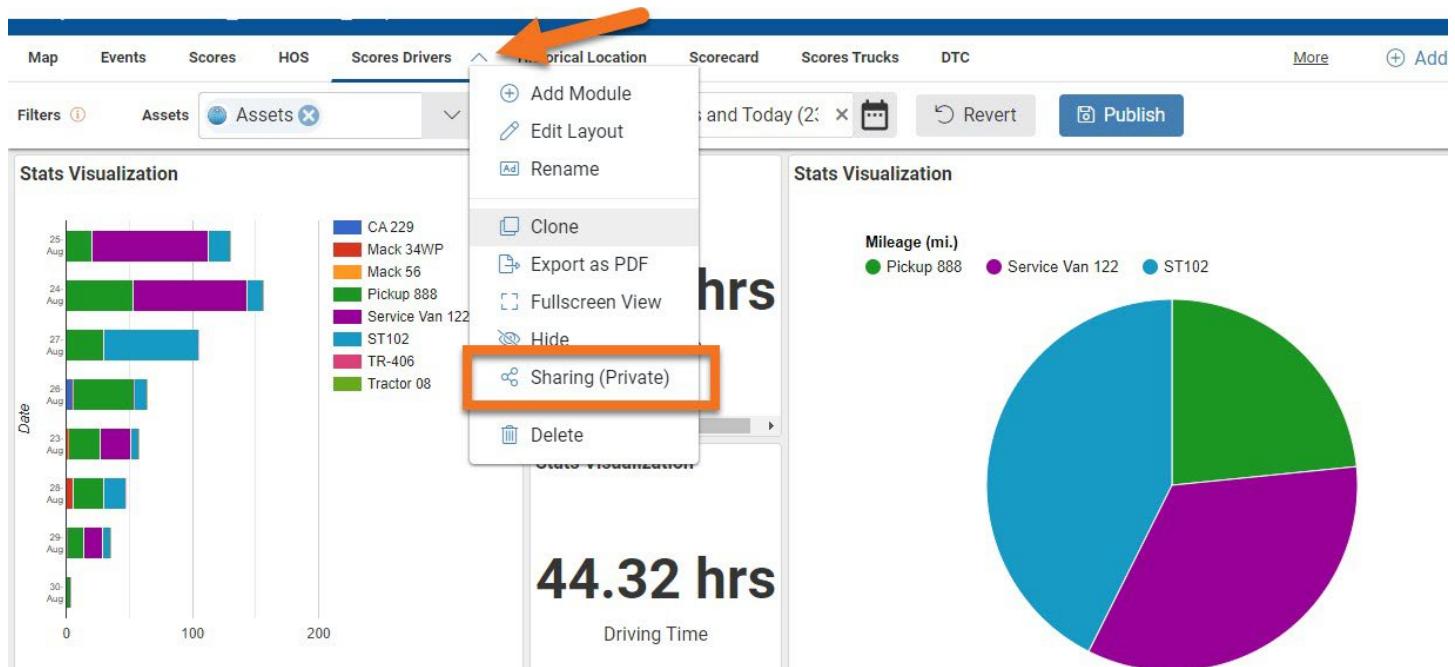


Admin – Share Dashboard or Change Ownership

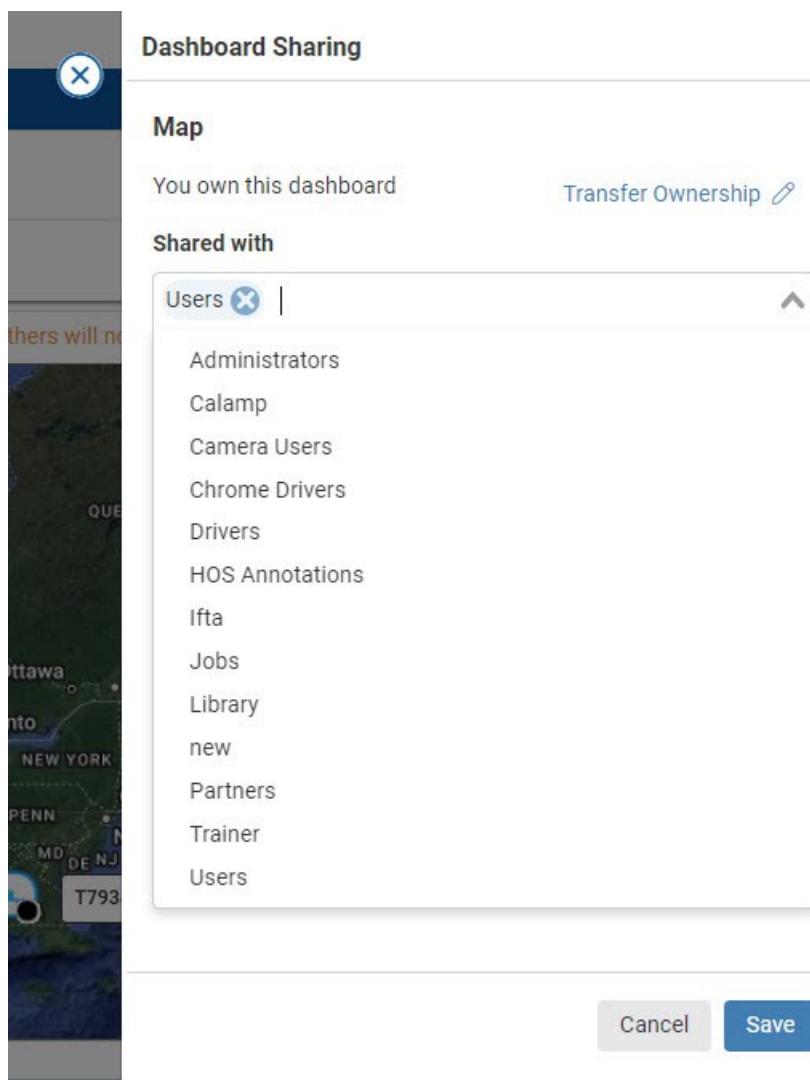
Admin users have permission to manage dashboard sharing. You can create the dashboard and share it from your main dashboard area, or use the Dashboard Admin tab to share any dashboard created by any user.

Share from Dashboard Tab

Admin users can share any dashboard they have created. Click on the dropdown arrow next to the name of the tab you would like to share. Choose “Sharing” from the dropdown.



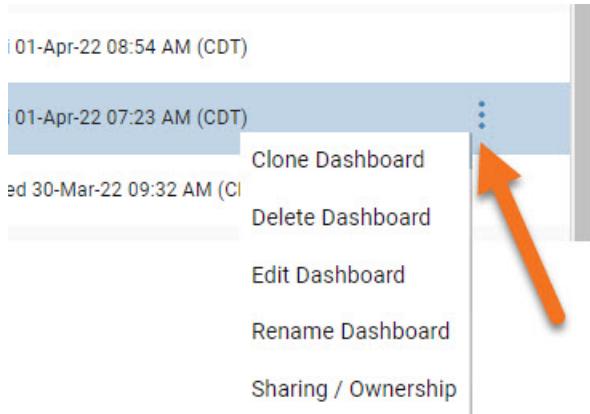
In the window that opens, choose the group(s) to share this dashboard to. You can only choose from your groups, not an individual user. Then save.



The screenshot shows the 'Dashboard Sharing' interface for a 'Map' dashboard. At the top, it says 'You own this dashboard' and 'Transfer Ownership'. Below that is a section titled 'Shared with' containing a list of users. The list includes: Administrators, Calamp, Camera Users, Chrome Drivers, Drivers, HOS Annotations, Ifta, Jobs, Library, new, Partners, Trainer, and Users. There is also a 'Users' button with a delete icon. At the bottom are 'Cancel' and 'Save' buttons.

Share from Dashboard Admin

If you are in the dashboard admin area, you can share any dashboard made by any user, including yourself, by clicking on the more menu that appears when you hover your mouse over the right side of the list of modules. Choose "Sharing/Ownership"



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In the window that appears, click in the Share With field to choose the group(s) to share this module to. Then make sure to save your changes.

The screenshot shows the 'Dashboard Sharing' dialog box. At the top left is a close button (X). Below it is the title 'Dashboard Sharing'. Underneath the title is the section 'Historical Location' with the message 'You own this dashboard' and a 'Transfer Ownership' link. The next section is 'Shared with', which contains a list of groups: Administrators, Calamp, Camera Users, Chrome Drivers, Drivers, HOS Annotations, Ifta, Jobs, Library, new, Partners, Trainer, and Users. At the bottom of the dialog are 'Cancel' and 'Save' buttons.

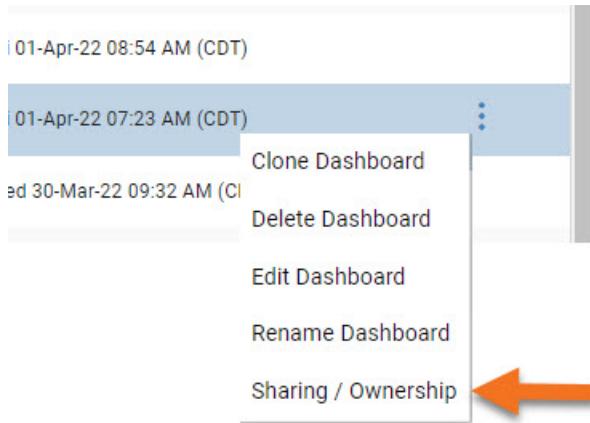
Remove Sharing

You can use these same two techniques above to remove sharing by clicking the X next to any groups that should be deleted from the **Sharing With** list.

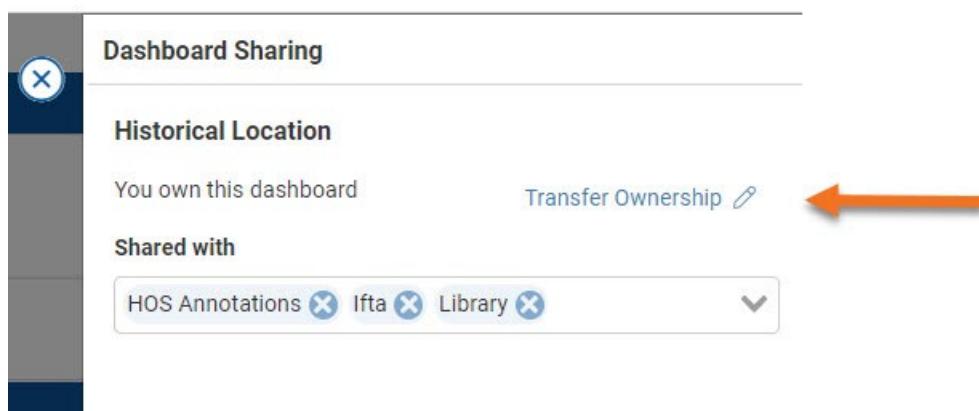
This screenshot shows the same 'Dashboard Sharing' dialog box as above, but with three groups removed: HOS Annotations, Ifta, and Library. An orange arrow points to the 'Library' entry, which has a red 'X' icon to its right, indicating it has been deleted. The other groups listed are Administrators, Calamp, Camera Users, Chrome Drivers, Drivers, new, Partners, Trainer, and Users.

Change Ownership of Dashboard

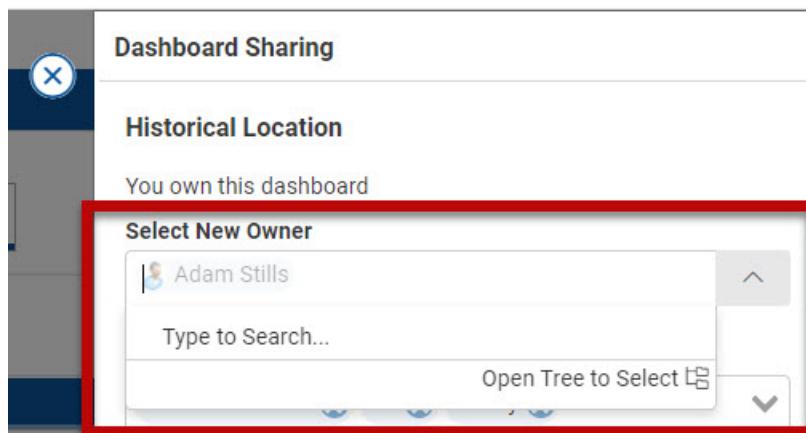
To change the ownership of a dashboard, it is easily done in the Dashboard Admin list More menu. Click on the more menu of the dashboard you want to transfer. It can be a shared dashboard or a user's individual dashboard. Choose **Sharing/Ownership** from the menu.



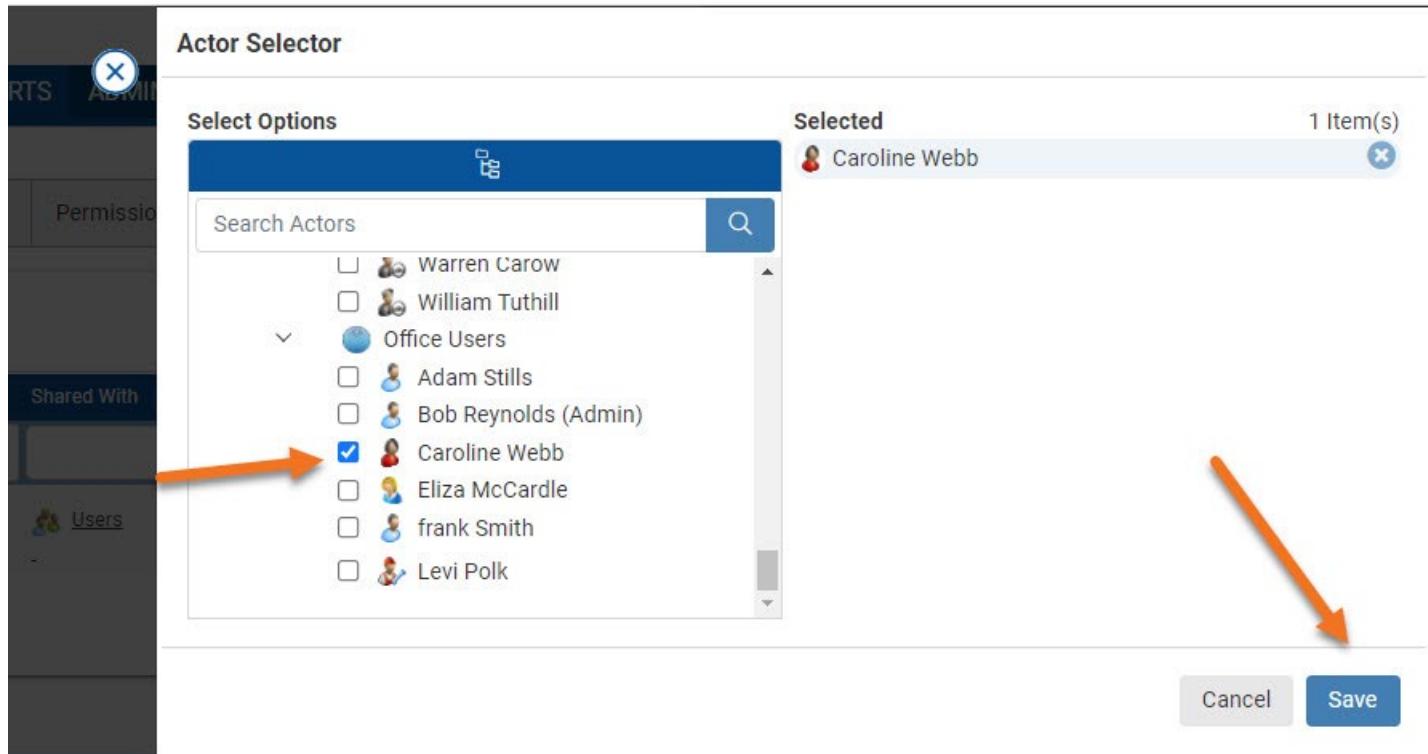
In the window that appears, you will see which user is the owner and next to that user's name is Transfer Ownership. Click the edit pencil.



Click in the "Select New Owner" field to search for a user or use the asset tree to select a user to be the new owner.



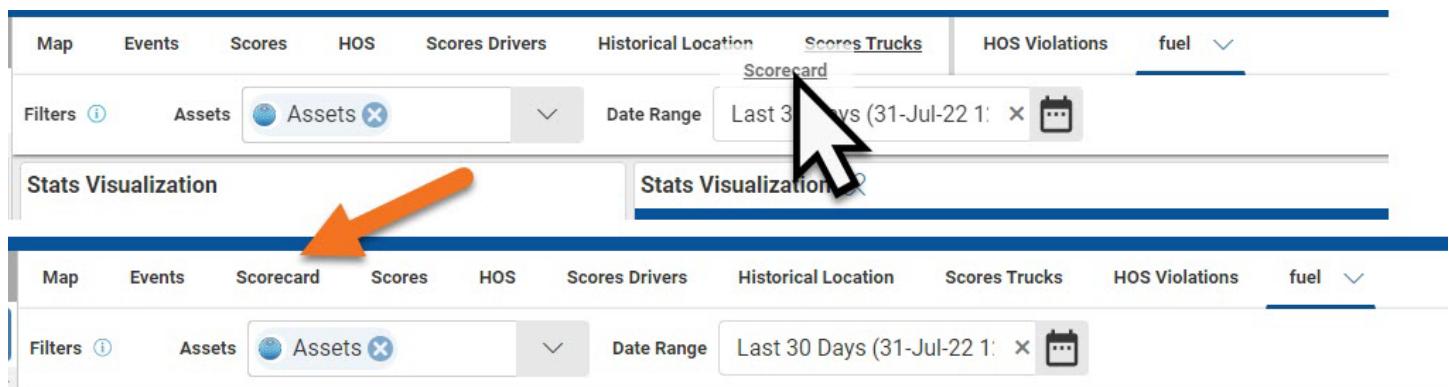
After selecting a new owner, Save your changes at the bottom.



The screenshot shows the 'Actor Selector' dialog box. On the left, there's a sidebar with 'RTS' and 'Admin' buttons, 'Permissions' and 'Shared With' sections, and a 'Users' button. The main area has a title 'Actor Selector' and a sub-section 'Select Options'. It includes a search bar 'Search Actors' with a magnifying glass icon. Below it is a list of users with checkboxes. The user 'Caroline Webb' is selected, indicated by a checked checkbox. An orange arrow points from the left sidebar towards this list. Another orange arrow points from the bottom right towards the 'Save' button. At the top right, it says 'Selected' with 'Caroline Webb' and '1 Item(s)'. At the bottom right are 'Cancel' and 'Save' buttons.

Rearrange Tab Order

If you want your dashboard tabs to be in a different order, you can move them with a click and hold on the tab. Then drag it to where you want the tab to be.



The screenshot shows a dashboard interface with several tabs at the top: Map, Events, Scores, HOS, Scores Drivers, Historical Location, Scores Trucks, HOS Violations, and fuel. The 'Scores Trucks' tab is currently active. Below the tabs, there are two sections labeled 'Stats Visualization'. A large orange arrow points from the top section's 'Scorecard' tab down to the bottom section's 'Scorecard' tab, indicating the action of dragging the tab to a new position. The bottom section's 'Scorecard' tab is highlighted with a blue border, while the top section's tab is not.