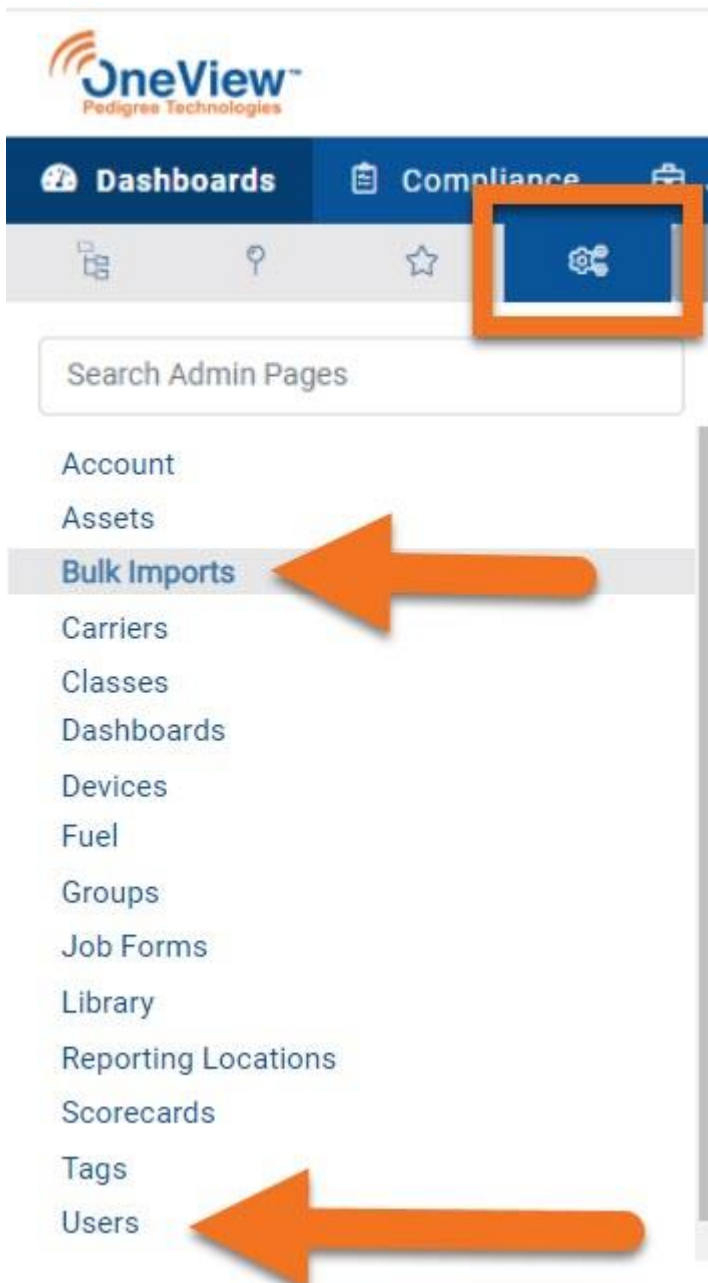


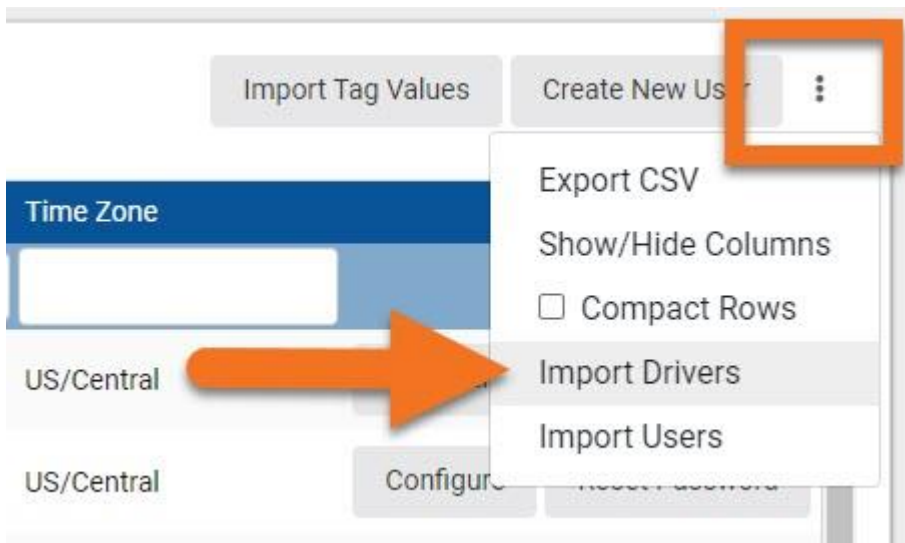
Our new Bulk Imports tool can be found in the Admin area. From here, you can import Drivers, Users, and Assets. This document will describe in detail each of these processes.

Importing Drivers

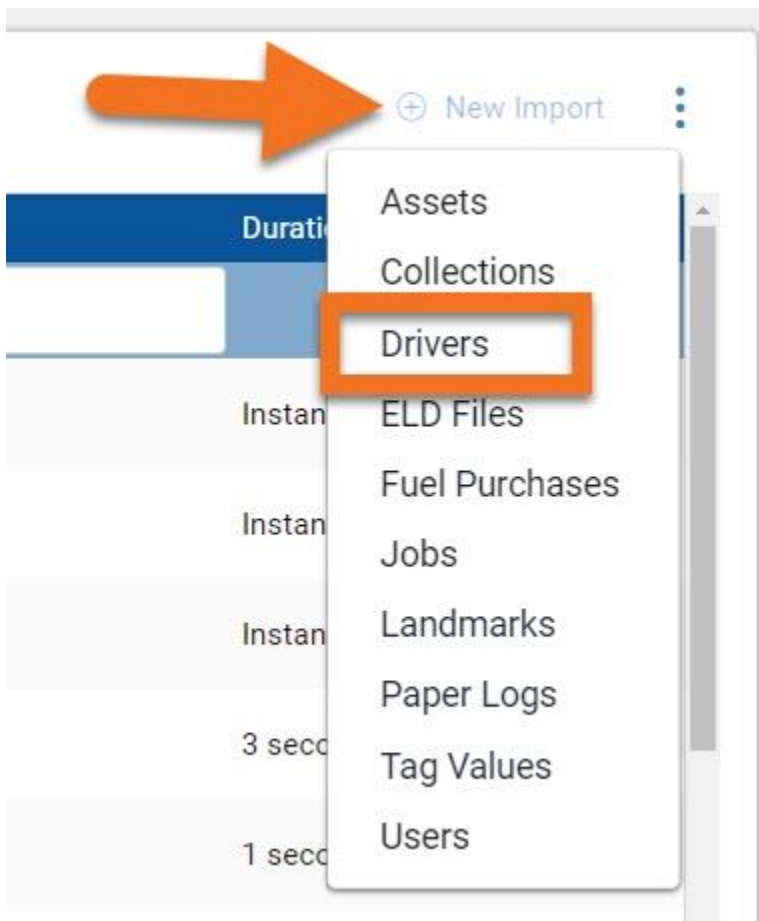
To quickly add multiple drivers into OneView, admin users can use a csv and our Import Drivers tool. Go to the Admin area and either choose **Users** or **Bulk Imports** from your list of admin pages.



On the **Users** page, choose the ellipsis menu and then Import Drivers.

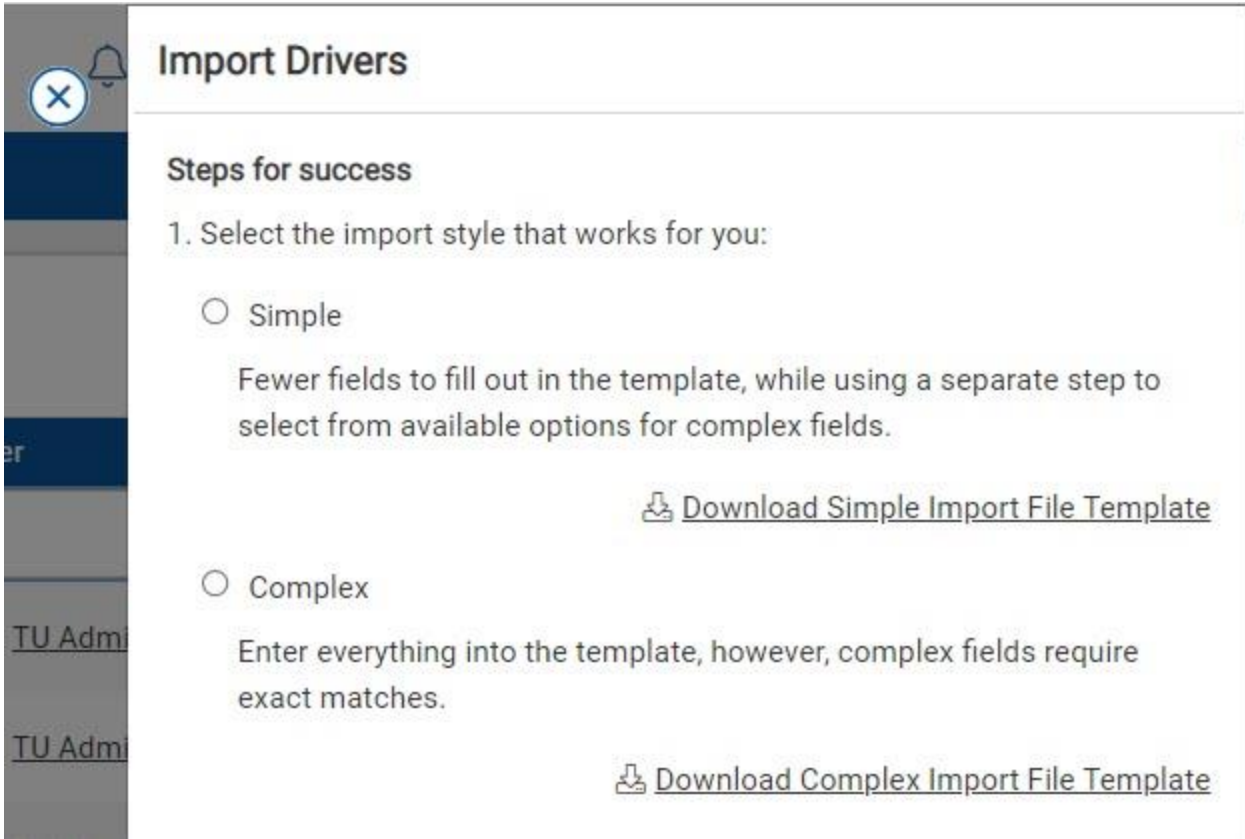


On the **Bulk Imports** page, use the **New Import** link to bring the import menu up and choose **Drivers**.



Simple vs. Complex Import

There are two types of imports that you can choose from. The **Simple** import is a simplified csv template and the **Complex** import allows for more flexibility with the driver details.



Import Drivers

Steps for success

1. Select the import style that works for you:

☐ Simple

Fewer fields to fill out in the template, while using a separate step to select from available options for complex fields.

[Download Simple Import File Template](#)

☐ Complex

Enter everything into the template, however, complex fields require exact matches.

[Download Complex Import File Template](#)

Considerations:

Region

All of the drivers in the import will be loaded into the same region so if you need to upload drivers to multiple regions, it may be helpful to have multiple csv uploads. One for each region. The region of a driver can always be changed later, so if your import isn't too large, and you have time to move the drivers after they are imported, including them all in one could be OK also.

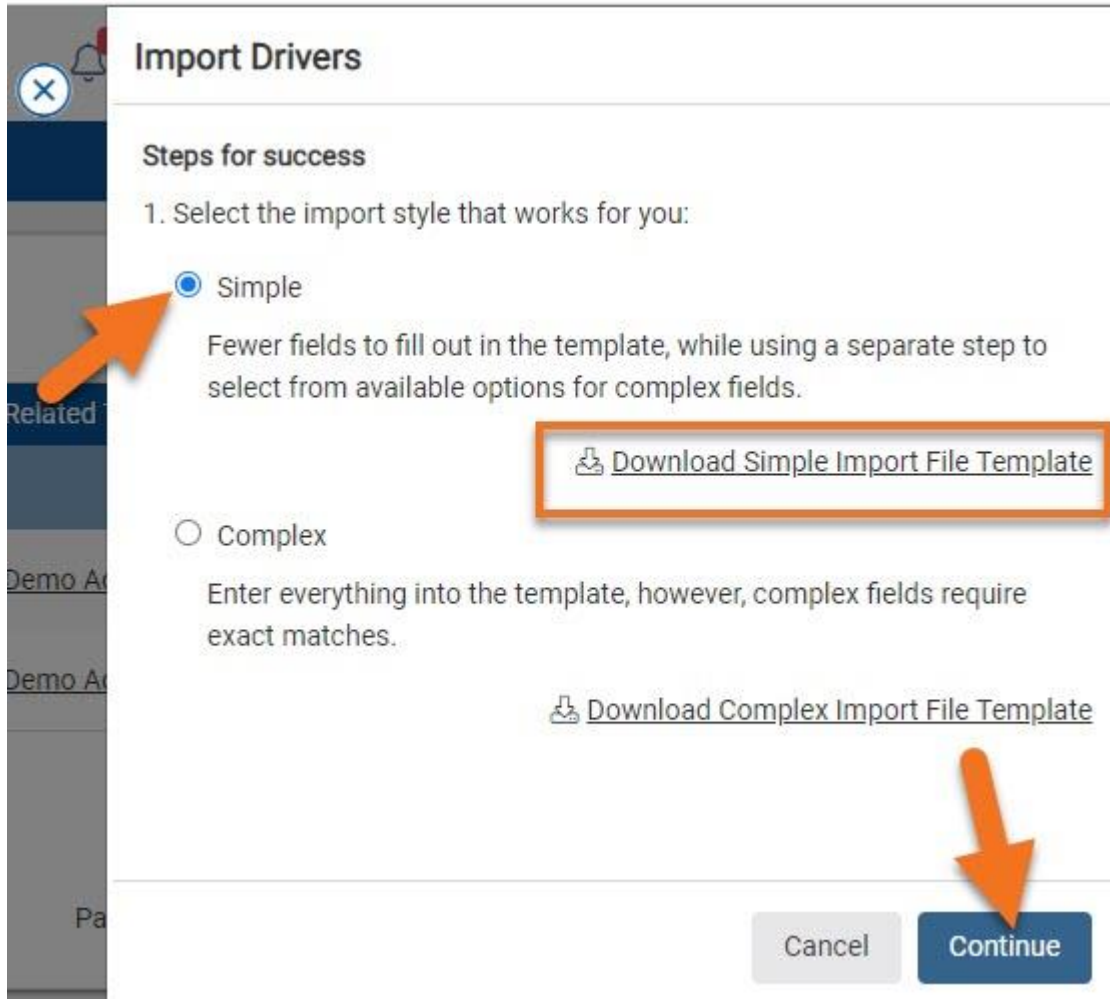
Driver Options

Simple: All drivers will need to be give the same options such as pre-trip/post-trip inspections, personal use of CMV, yard move, etc. because they are chosen in the upload window for the entirety of the upload.

Complex: each driver can be assigned the options on an individual basis because the driver options are columns in the template file.

Simple Import

Check the simple option and then Continue. There is a template download on this screen or you can also download the template on the next screen.



Import Drivers

Steps for success

1. Select the import style that works for you:

☒ Simple

Fewer fields to fill out in the template, while using a separate step to select from available options for complex fields.

[Download Simple Import File Template](#)

☐ Complex


Enter everything into the template, however, complex fields require exact matches.

[Download Complex Import File Template](#)

Cancel Continue

On the Import Drivers screen, the left side of the window includes the template file that you can download. There is a chart that shows which columns in the template are required (True), and which columns are optional (False). Any formatting that is required is also demonstrated in the chart, such as the email structure or the cell phone structure if you're adding driver's cell phone numbers to their account.

Download the template and add the driver details to the CSV file.



Import Drivers

Steps for success

1. Download the [import file template](#)
2. Ensure your data has the required fields and formatting as shown below and import your file.
3. Make selections applicable to all records uploaded.
4. Begin import

File Upload*

Required Selections

Select Region*

Class*

Select Class

Driving Rule*

Period Start Time*

00:00

ELD Exempt Option

☐

24-Hour Reset Option

☐

Waiting at Wellsite

☐

DOV Screen Lock

☐

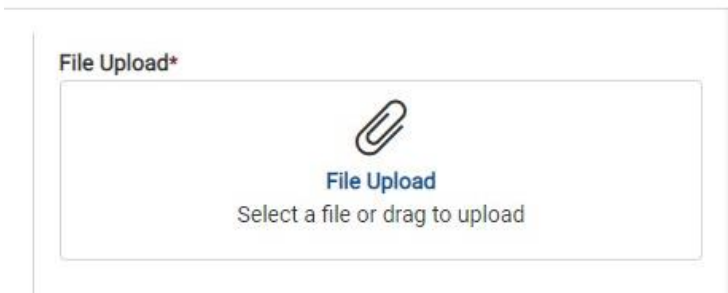
Fields	Required Format	Required
First Name	-	True
LastName	-	True
Email	JohnDoe@email.com	True
Username	-	True
Password	-	False
Cell Phone #	(xxx)xxx-xxxx	False
Cell Carrier	-	False
Time Zone	-	False
Driver's License #	-	True
Driver's License State	-	True

	A	B	C	D	E	F	G	H	I	J	K
1	* First Name	* Last Name	Email	* Username	Password	Cell Phone	Cell Carrier	Time Zone	* Driver's License #	* Driver's License State	
2											
3											
4											

Considerations:

- If an email is used and the password field is not used, the driver will receive an email to set their own password.
- If the Time Zone is not filled in, the driver will default to your account's time zone, and if that is not set, the time zone will default to Central time. Time zone can be changed in bulk on the Drivers List page.

When you are finished filling out the template, the right side of the Import window includes the File Upload field. Choose the driver list you've created. The file MUST BE A CSV.




The csv will be uploaded into a single region. Select the region from the Region field. Bring up your tree or search for the region by name.

Consideration: If you are uploading drivers into multiple regions, a separate upload is needed for each region.

Required Selections

Select Region*

 Drivers

[Open Tree to Select](#)

Select the class you want to use for your drivers.

Class*

 User Driver

Select the ruleset for all drivers in this upload. (Ruleset can be changed in bulk on the Drivers List, or you can use multiple csv uploads to assign multiple rulesets. The Complex upload allows you to assign the ruleset in the CSV.)

Driving Rule* 

The period start time for most drivers is Midnight, so you can normally leave this field as is.

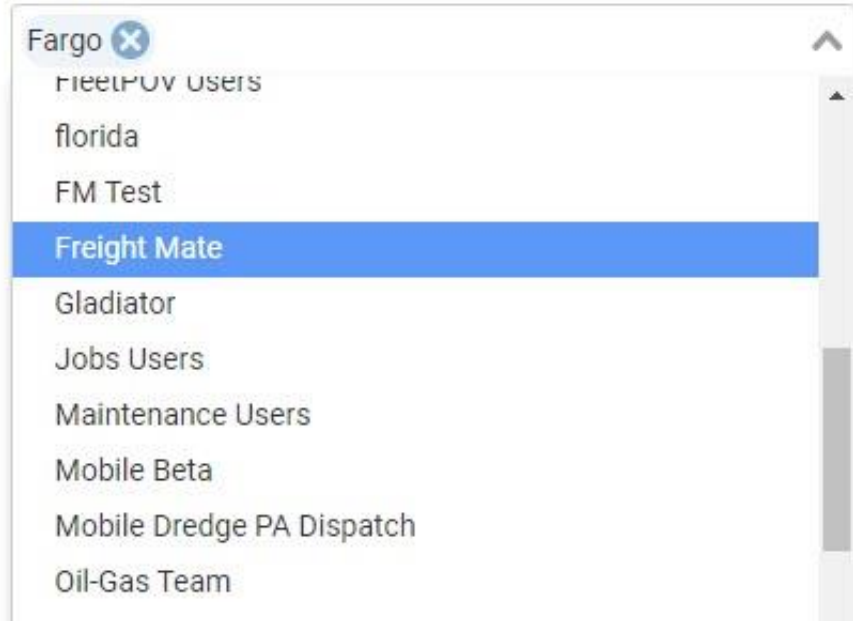
Period Start Time* 

The driver options will all need to be set the same for each csv upload. These options can always be changed later from the Drivers List or on a driver's individual configuration. (The complex import includes these options in the csv so driver can all have separate options selected.)

ELD Exempt Option☐**24-Hour Reset Option**☐**Waiting at Wellsite Option**☐**POV Screen Lock Enabled**☒**16-Hour Big Day Option**☐**Personal Use of CMV Option**☒**Yard Move Option**☒**California Meal Break Option**☐**Require Pre-Trip**☒**Require Post-Trip**☒

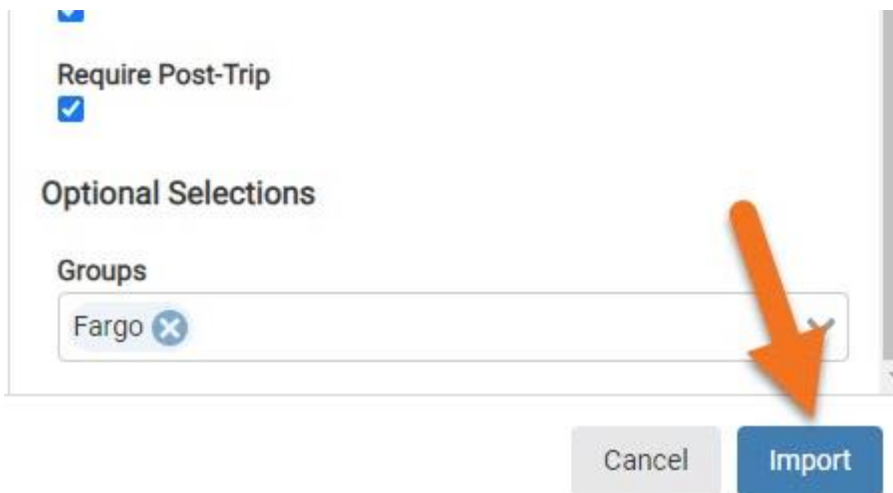
The final field - Groups - is optional. If all of these drivers are in the same groups, you can select 1 or more from your groups list.

Groups



A screenshot of a dropdown menu titled "Groups". The menu is open, showing a list of group names. "Fargo" is at the top with a close button (X). Below it are "FleetPOV Users", "florida", "FM Test", "Freight Mate" (which is highlighted with a blue background), "Gladiator", "Jobs Users", "Maintenance Users", "Mobile Beta", "Mobile Dredge PA Dispatch", and "Oil-Gas Team". A scroll bar is visible on the right side of the list.

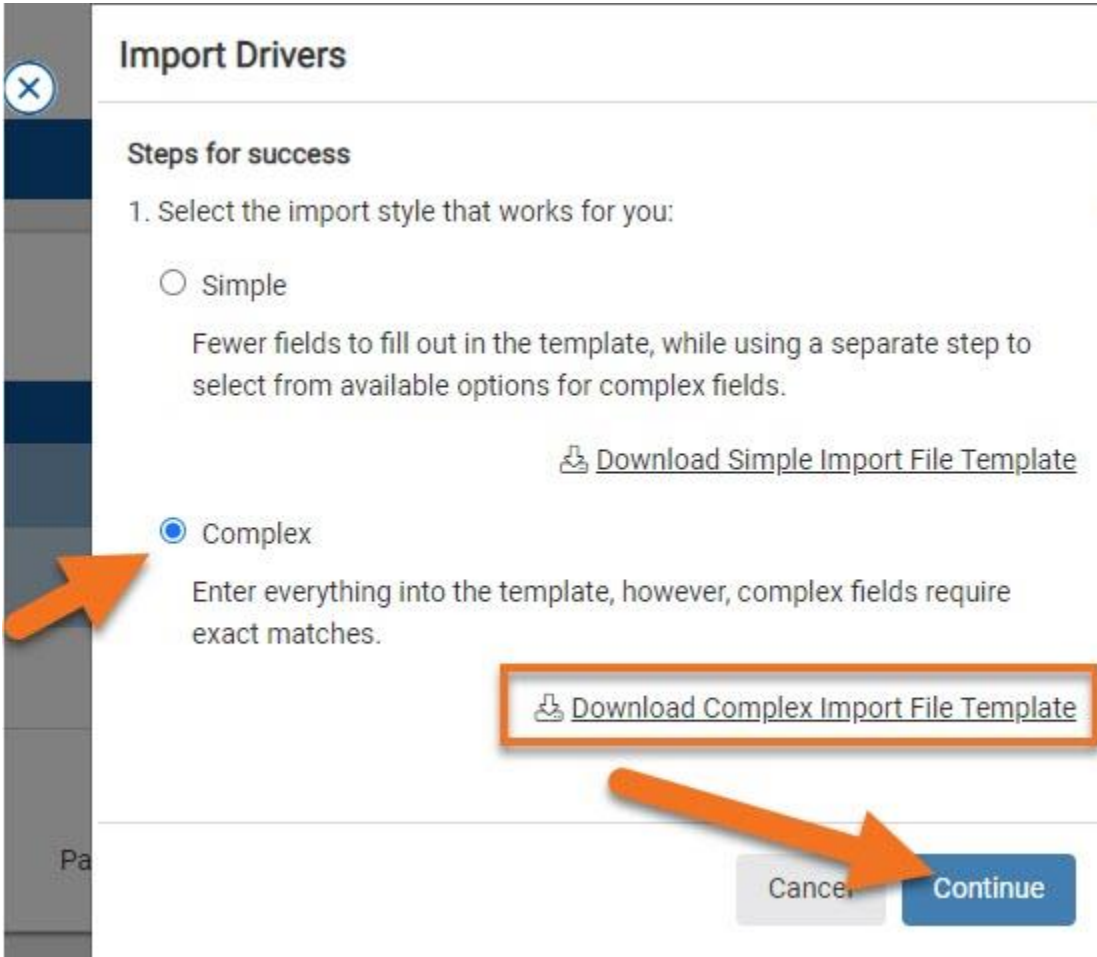
When you are ready, choose Import at the bottom right.



A screenshot of the bottom portion of a form. It includes a "Require Post-Trip" checkbox which is checked. Below that is a section titled "Optional Selections" containing a "Groups" dropdown menu. The dropdown menu is open, showing "Fargo" as the selected option. A large orange arrow points from the "Groups" dropdown towards the "Import" button. At the bottom right, there are two buttons: "Cancel" and "Import".

Complex Import

Choose the Complex option and download the template (or you can download the template on the next window) then choose Continue.



Import Drivers

Steps for success

1. Select the import style that works for you:

☐ Simple

Fewer fields to fill out in the template, while using a separate step to select from available options for complex fields.

[Download Simple Import File Template](#)

☒ **Complex**

Enter everything into the template, however, complex fields require exact matches.

[Download Complex Import File Template](#)

[Cancel](#) [Continue](#)

On the Import Drivers screen, the left side of the window includes the template file that you can download. There is a chart that shows which columns in the template are required (True), and which columns are optional (False). Any formatting that is required is also demonstrated in the chart, such as the email structure or the cell phone structure if you're adding driver's cell phone numbers to their account.

The difference between the complex and the simple is that here on the Complex import, all of the individual driver options are part of the CSV spreadsheet. On the CSV spreadsheet, use True to give the driver that option and False to not give the driver that option.

ELD Exempt Option	true/false	False
ELD Exempt Reason	-	False
24-Hour Reset Option	true/false	False
Waiting at Wellsite Option	true/false	False
POV Screen Lock Enabled	true/false	False
16-Hour Big Day Option	true/false	False
Personal Use of CMV Option	true/false	False
Yard Move Option	true/false	False
California Meal Break Option	true/false	False
Require Pre-Trip	true/false	False
Require Post-Trip	true/false	False


	N	O	P	Q	R	S	T	U	V	W	X	Y
State	ELD Exempt	ELD Exempt Reason	24 Hour Reset Option	Waiting at Wellsite Option	POV Screen Lock Enabled	16 Hour Big Day Option	Personal Use of CMV Option	Yard Move Option	California Meal Break Option	Require Pre-Trip	Require Post-Trip	

On the right side of the import window, the top field is to choose the upload file. The template that you fill out must be saved as a csv in order to upload successfully.

Choose the region the drivers will all be imported to. If you are importing to multiple regions, you will need a separate csv for each region.

Groups are optional. You can add them now in this upload if all drivers should be in the same groups, or you can add groups to drivers after the import using the Groups page. If you have many drivers in different groups, such as different branches that access only certain assets, you may want to upload a separate spreadsheet for each branch.

File Upload*


File Upload
Select a file or drag to upload

Required Selections

Select Region*



Optional Selections

Groups



After your import is done, you can go to the Bulk Imports page to view the success of the upload. The conformation window of the upload has a quick link to the bulk imports page. If you're already on that page, you can just Close this message.

Import Started 

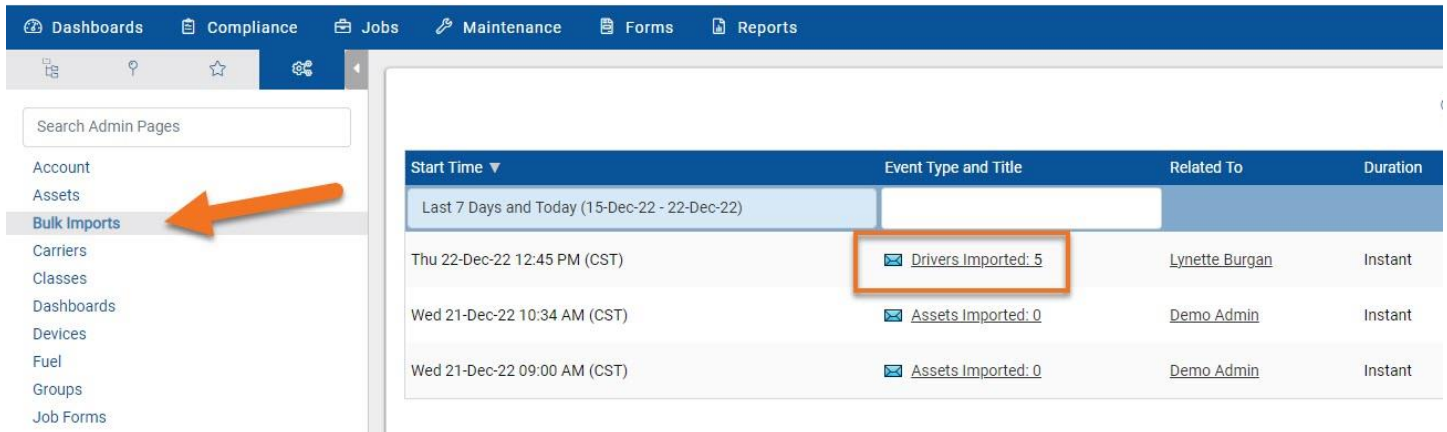
Your import is being processed.

Check the status of records imported on the [Bulk Imports page](#)

Close

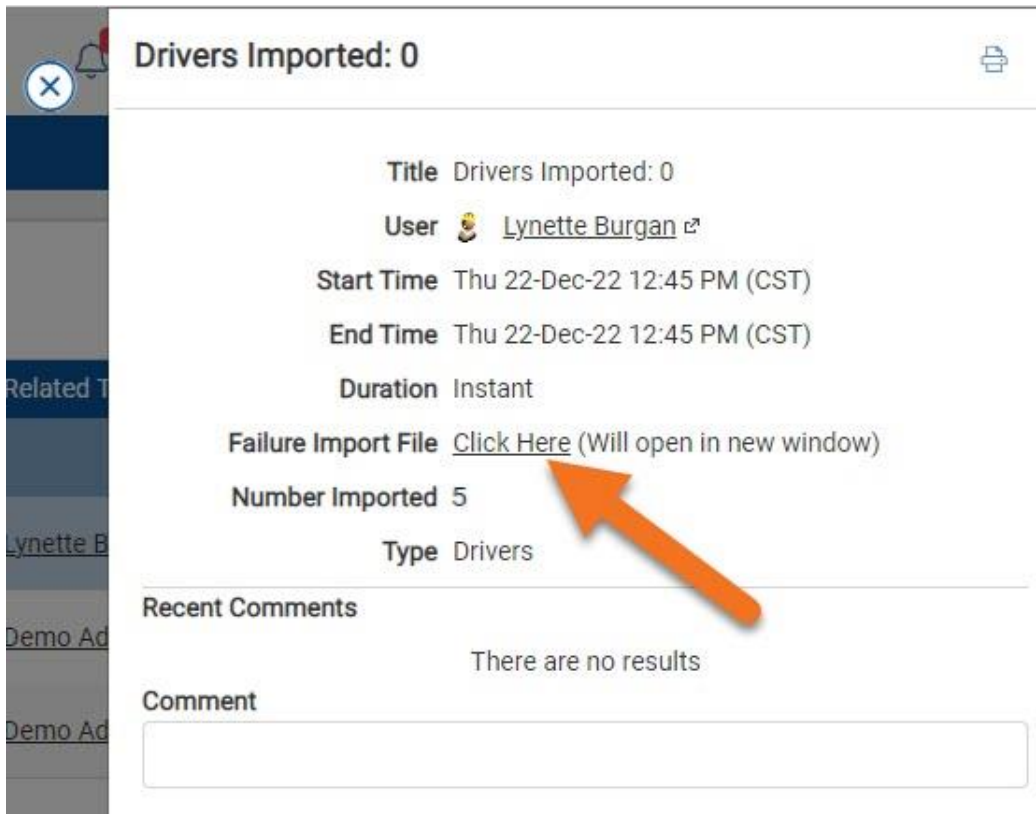
On the Bulk Imports page, you will find any upload events for any bulk import so you can check the status of the upload.

Find the event by date/time order of their upload, and use the event filter to find specific kinds of imports. You will be able to see how many drivers were successfully uploaded. If that number doesn't match your spreadsheet, click on it to view the failure file.




Start Time ▼	Event Type and Title	Related To	Duration
Last 7 Days and Today (15-Dec-22 - 22-Dec-22)			
Thu 22-Dec-22 12:45 PM (CST)	Drivers Imported: 5	Lynette Burgan	Instant
Wed 21-Dec-22 10:34 AM (CST)	Assets Imported: 0	Demo Admin	Instant
Wed 21-Dec-22 09:00 AM (CST)	Assets Imported: 0	Demo Admin	Instant

The failure file will show which drivers didn't upload and will give you the reason. The most common reason may be the username is already taken. Just change the incorrect information and upload these drivers again.



Drivers Imported: 0

Title Drivers Imported: 0

User  [Lynette Burgan](#)

Start Time Thu 22-Dec-22 12:45 PM (CST)

End Time Thu 22-Dec-22 12:45 PM (CST)

Duration Instant

Failure Import File [Click Here](#) (Will open in new window)

Number Imported 5

Type Drivers

Recent Comments

There are no results

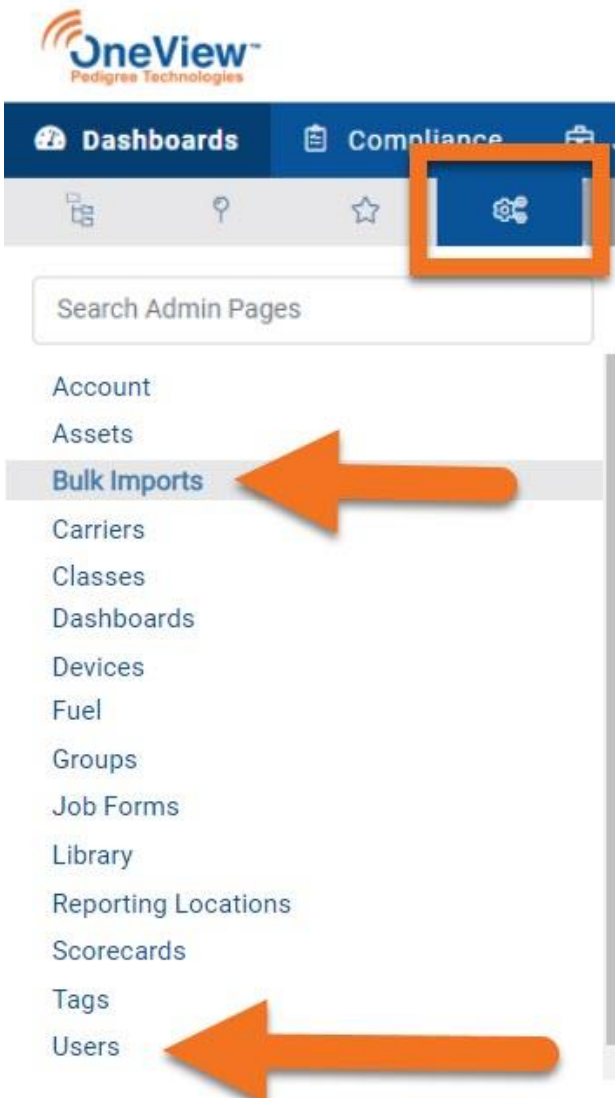
Comment

	A	B	C	D	E	F
1	Item	Failure Reason				
2	Jordan	Error creating actor: DriverLicenseState length incorrect				
3						
4						
5						
6						

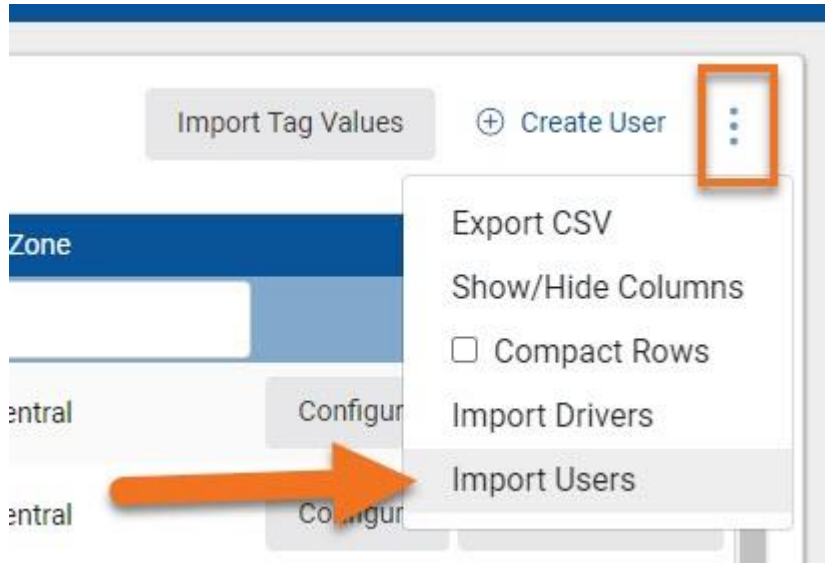
Don't re-import the full file again. Put only the corrected drivers into a new csv template to upload.

Importing Users

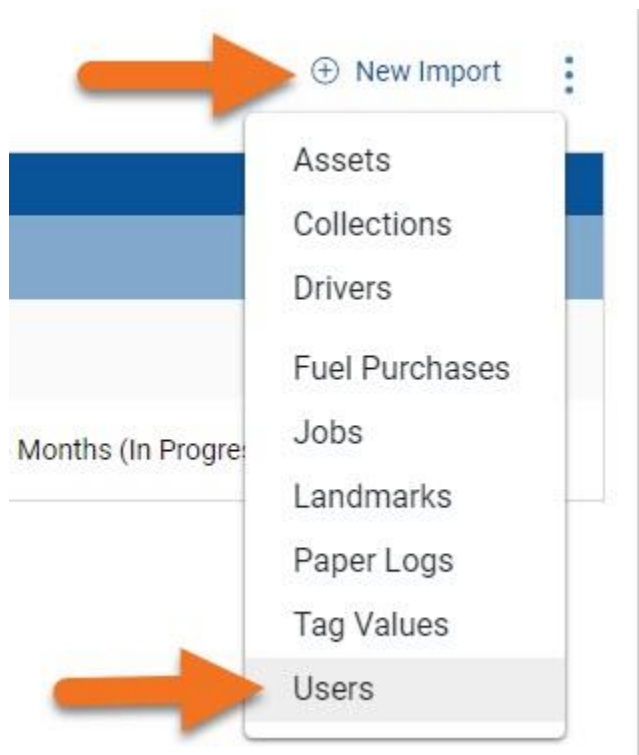
To quickly add multiple users into OneView, admin users can use a csv and our Import Users tool. Go to the Admin area and either choose **Users** or **Bulk Imports** from your list of admin pages.



On the **Users** page, choose the ellipsis menu and then import Users.




On the **Bulk Imports** page, use the **New Import** link to bring the import menu up and choose Users.



Simple vs. Complex Import

There are two types of imports that you can choose from. The **Simple** import is a simplified csv template and the **Complex** import allows for more flexibility with the users details.



Import Users

Steps for success

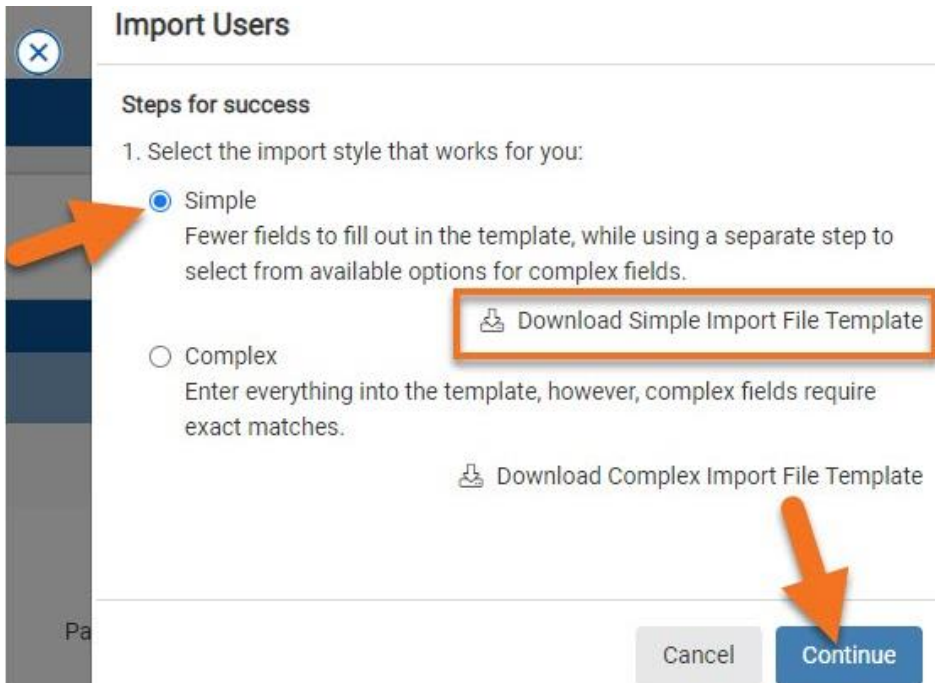
1. Select the import style that works for you:
 - ☐ Simple
Fewer fields to fill out in the template, while using a separate step to select from available options for complex fields.
[!\[\]\(8b944636c18086005afb4c34c5fb9650_img.jpg\) Download Simple Import File Template](#)
 - ☐ Complex
Enter everything into the template, however, complex fields require exact matches.
[!\[\]\(776b8e5baf5710dd2ff4466059f1d935_img.jpg\) Download Complex Import File Template](#)

Considerations:

The simple template does not include the user class. In the simple upload all of the users being uploaded get the same user class. The Complex template allows you to assign any user class to any user within the template.

Simple Import

Check the simple option and then Continue. There is a template download on this screen or you can also download the template on the next screen.



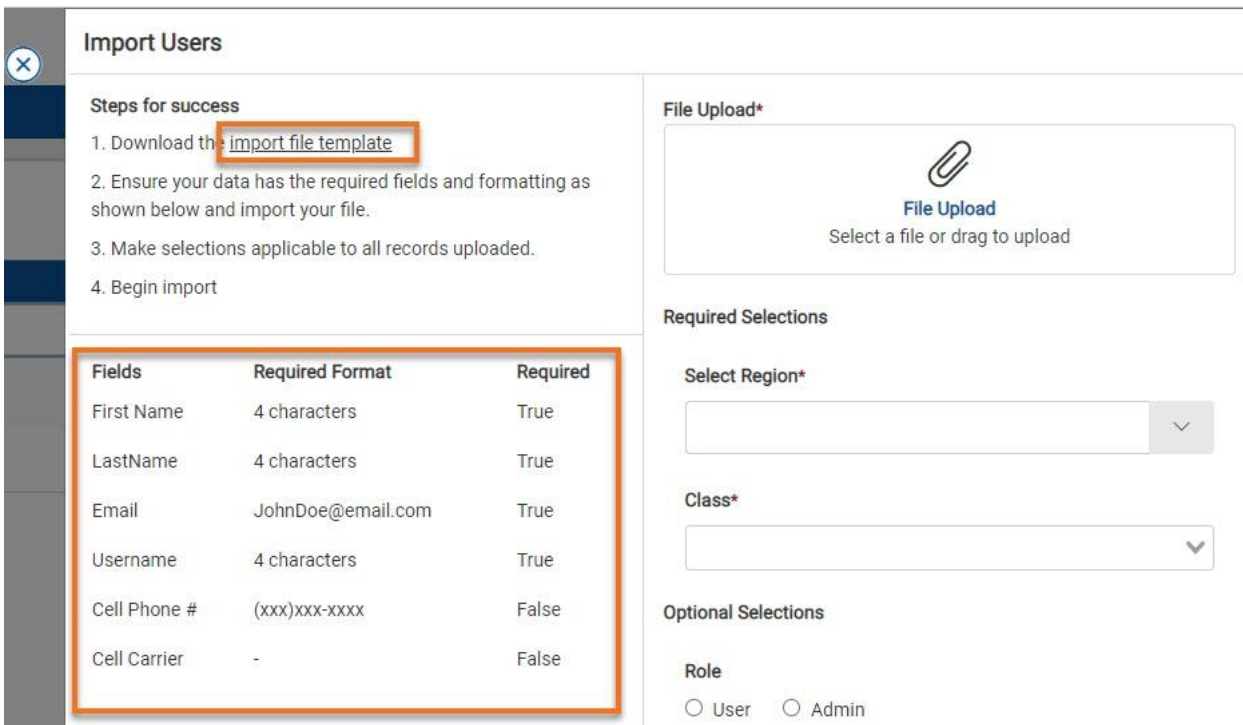
Import Users

Steps for success

1. Select the import style that works for you:
 - ☒ **Simple**
Fewer fields to fill out in the template, while using a separate step to select from available options for complex fields.
 - ☐ **Complex**
Enter everything into the template, however, complex fields require exact matches.

[Download Simple Import File Template](#)
[Download Complex Import File Template](#)

On the Import Users screen, the left side of the window includes the template file that you can download. There is a chart that shows which columns in the template are required (True), and which columns are optional (False). Any formatting that is required is also demonstrated in the chart, such as the email structure or the cell phone structure if you're adding user's cell phone numbers to their account.




Import Users

Steps for success

1. Download the [import file template](#)
2. Ensure your data has the required fields and formatting as shown below and import your file.
3. Make selections applicable to all records uploaded.
4. Begin import

Fields	Required Format	Required
First Name	4 characters	True
LastName	4 characters	True
Email	JohnDoe@email.com	True
Username	4 characters	True
Cell Phone #	(xxx)xxx-xxxx	False
Cell Carrier	-	False

File Upload*


File Upload
Select a file or drag to upload

Required Selections

Select Region*

Class*

Optional Selections

Role
☐ User ☐ Admin

Download the template and add the user details.

	A	B	C	D	E	F	G	H
1	* First Name	* Last Name	* Email	* Username	Cell Phone #	Cell Carrier	Time Zone	
2								
3								
4								
5								
6								
7								

Note: Unlike the driver upload, there is no password column. All users must have an email address and they will be sent an email to choose their own password.

When you are finished filling out the template, the right side of the Import window includes the File Upload field. Choose the users list you've created. The file MUST BE A CSV.

The csv will be uploaded into a single region. Select the region from the Region field. Bring up your tree or search for the region by name.

Consideration: If you are uploading users into multiple regions, a separate upload is needed for each region.

Select Region*

Office Users

Type to Search...

Open Tree to Select

Select the class you want to use for all users. (The complex upload template includes class so you can assign different classes to each user).

Class*

User Suit

Tanker Trailer

User

User Astronaut

User Beard

User Driver

User Girl

User Guy

User Lady

User Mechanic

User Queen

User Spy

User Suit

The final fields are optional. There are role fields--User or Admin. If nothing is selected for Role, the users in the import will default to User. You can assign them an admin role later if needed. Also, the group selections are optional here. If you select 1 or more groups, all users in this import will be in those groups. You can change their assigned groups later.

Optional Selections

Role

☒ User ☐ Admin

Group

A dropdown menu for selecting groups. The menu is open, showing a list of groups. The first group, "Canada ELD", is highlighted in blue. The other groups listed are "Chrome Drivers", "Digital Library", "HOS Annotations", "Jobs", "John Test Group", "Library Management", "Mechanics", "Tanks", "test visibility", and "Trainer".

- Canada ELD
- Chrome Drivers
- Digital Library
- HOS Annotations
- Jobs
- John Test Group
- Library Management
- Mechanics
- Tanks
- test visibility
- Trainer

After you finish with these field, choose Import at the bottom right.

A form showing the "Groups" field with a dropdown menu. The dropdown menu is open, showing a list of groups. The first group, "Fargo", is selected and displayed in the input field. An orange arrow points to the "Import" button at the bottom right of the form.

Groups

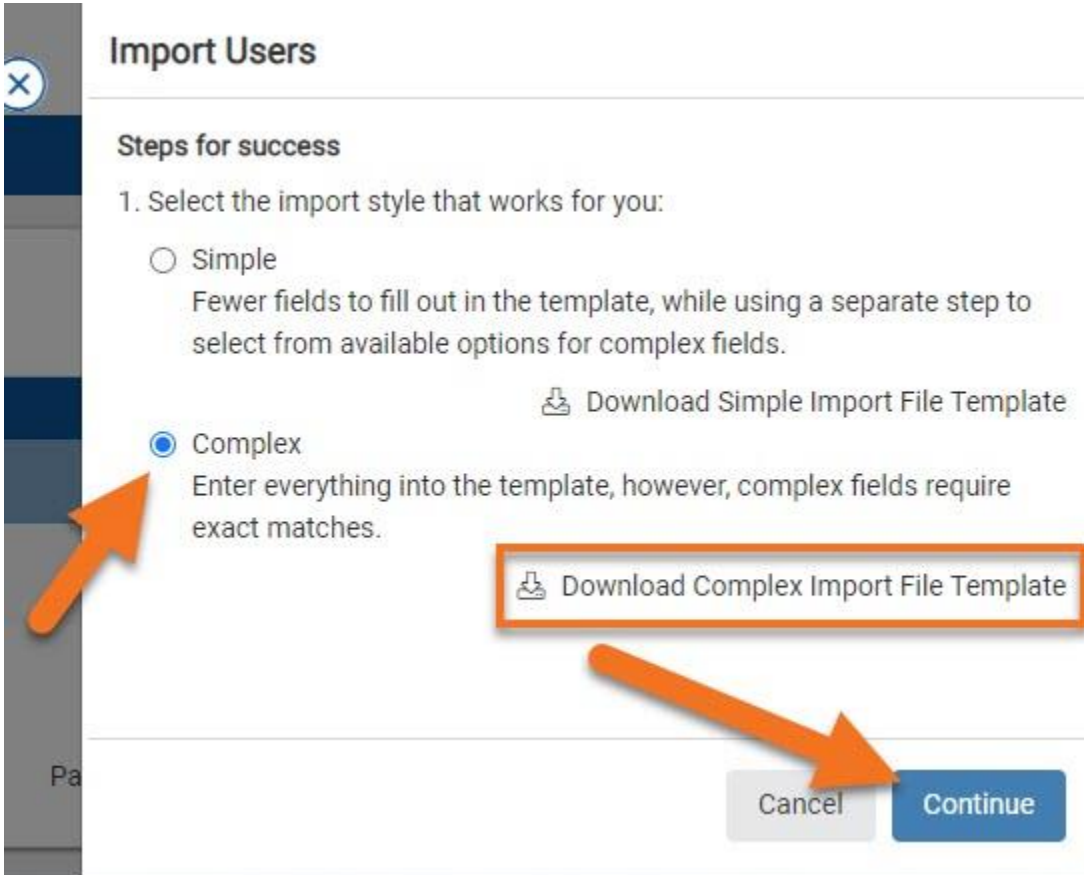
Fargo 



Cancel Import

Complex Import

Choose the Complex option and download the template (or you can download the template on the next window) then choose Continue.



The screenshot shows a dialog box titled "Import Users" with a close button (X) in the top left corner. Below the title is a section "Steps for success" with the instruction "1. Select the import style that works for you:". There are two radio button options: "Simple" and "Complex". The "Complex" option is selected, indicated by a blue dot and an orange arrow pointing to it. Below the "Simple" option is a link "Download Simple Import File Template". Below the "Complex" option is a link "Download Complex Import File Template", which is highlighted with an orange rectangle. At the bottom right are two buttons: "Cancel" and "Continue". An orange arrow points from the "Download Complex Import File Template" link to the "Continue" button.

Import Users

Steps for success

1. Select the import style that works for you:

☐ Simple
Fewer fields to fill out in the template, while using a separate step to select from available options for complex fields.

[Download Simple Import File Template](#)

☒ **Complex**
Enter everything into the template, however, complex fields require exact matches.

[Download Complex Import File Template](#)

[Cancel](#) [Continue](#)

On the Import Users screen, the left side of the window includes the template file that you can download. There is a chart that shows which columns in the template are required (True), and which columns are optional (False). Any formatting that is required is also demonstrated in the chart, such as the email structure or the cell phone structure if you're adding user's cell phone numbers to their account.

Import Users

Steps for success

1. Download the [import file template](#)
2. Ensure your data has the required fields and formatting as shown below and import your file.
3. Make selections applicable to all records uploaded.
4. Begin import

Fields	Required Format	Required
First Name	4 characters	True
LastName	4 characters	True
Email	JohnDoe@email.com	True
Username	4 characters	True
Cell Phone #	(xxx)xxx-xxxx	False
Cell Carrier	-	False
Class	-	True

The difference between the simple and the complex templates is the Class column. You can assign different classes to each user.

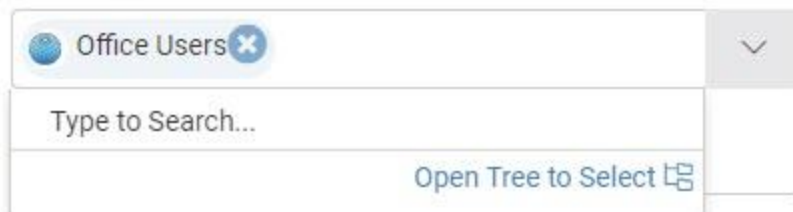
	A	B	C	D	E	F	G	H	I
1	* First Name	* Last Name	* Email	* Username	* Class	Cell Phone	Cell Carrie	Time Zone	
2									
3									
4									
5									
6									
7									

When you are finished filling out the template, the right side of the Import window includes the File Upload field. Choose the users list you've created. The file MUST BE A CSV.

The csv will be uploaded into a single region. Select the region from the Region field. Bring up your tree or search for the region by name.

Consideration: If you are uploading users into multiple regions, a separate upload is needed for each region.

Select Region*

A dropdown menu for selecting a region. The selected item is "Office Users" with a blue circular icon and a close button (X). Below the dropdown is a search bar with the placeholder text "Type to Search...". To the right of the search bar is a link that says "Open Tree to Select" with a tree icon.

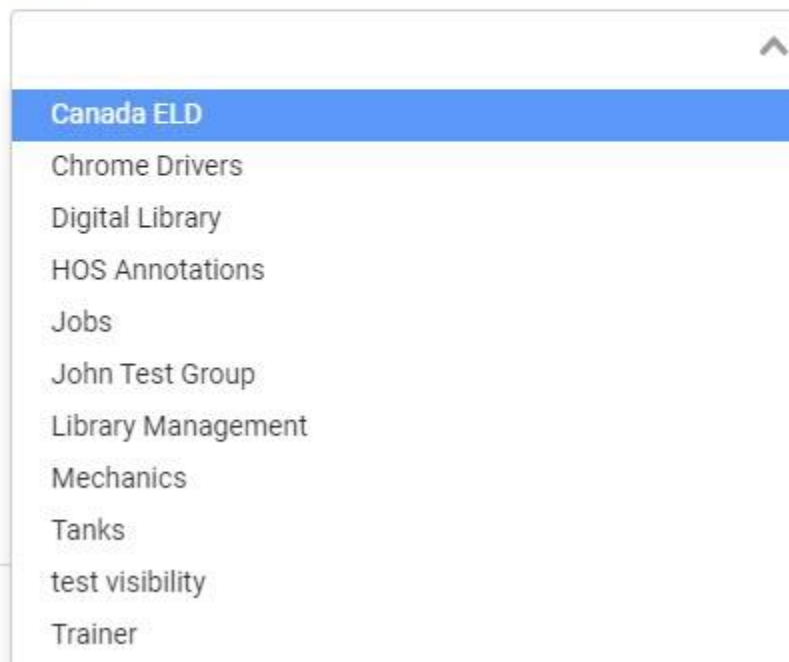
The final fields are optional. There are role fields, User and Admin. If nothing is selected for Role, the users in the import will default to User. You can assign them an admin role later if needed. Also, the group selections are optional here. If you select 1 or more groups, all users in this import will be in those groups. You can change their assigned groups later.

Optional Selections

Role

☒ User ☐ Admin

Group

A dropdown menu for selecting groups. The menu is open, showing a list of groups. The first group, "Canada ELD", is highlighted in blue. The other groups listed are "Chrome Drivers", "Digital Library", "HOS Annotations", "Jobs", "John Test Group", "Library Management", "Mechanics", "Tanks", "test visibility", and "Trainer".

After you finish with these field, choose Import at the bottom right.



Groups

Fargo

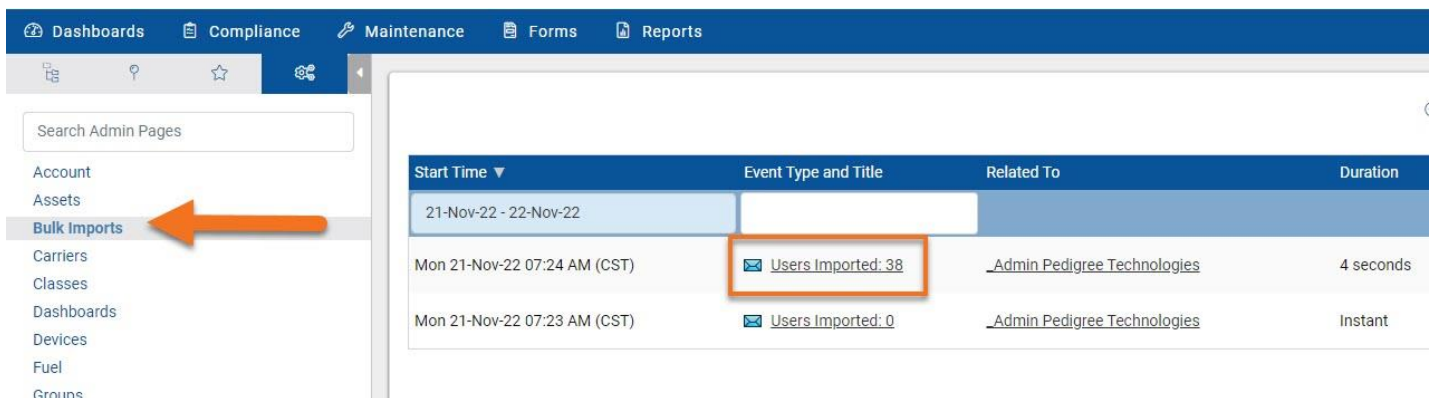
Cancel Import



After your import is done, you can go to the Bulk Imports page to view the success of the upload. The conformation window of the upload has a quick link to the bulk imports page. If you're already on that page, you can just Close this message.




On the Bulk Imports page, you will find any upload events for any bulk import so you can check the status of the upload.

Find the event by date/time order of their upload, and use the event filter to find specific kinds of imports. You will be able to see how many users were successfully uploaded. If that number doesn't match your spreadsheet, click on it to view the failure file.




Start Time ▼	Event Type and Title	Related To	Duration
21-Nov-22 - 22-Nov-22			
Mon 21-Nov-22 07:24 AM (CST)	 Users Imported: 38	_Admin Pedigree Technologies	4 seconds
Mon 21-Nov-22 07:23 AM (CST)	 Users Imported: 0	_Admin Pedigree Technologies	Instant



The failure file will show which users didn't upload and will give you the reason. The most common reason may be the username is already taken. Just change the incorrect information and upload these users again.



Users Imported: 38



Title Users Imported: 38

User  [Admin Pedigree Technologies](#) 

Start Time Mon 21-Nov-22 07:24 AM (CST)

End Time Mon 21-Nov-22 07:24 AM (CST)

Duration 4 seconds

Failure Import File [Click Here](#) (Will open in new window)

Input File [Click Here](#) (Will open in new window)

Number Imported 38

Successful Import File [Click Here](#) (Will open in new window)

Type Users

Recent Comments

There are no results

Comment

	A	B	C	D	E	F	G	H	
1	Item	Failure Reason							
2	Charlie	Error creating actor: A user with the specified username already exists.							
3	Sam	Error creating actor: A user with the specified username already exists.							
4									
5									
6									

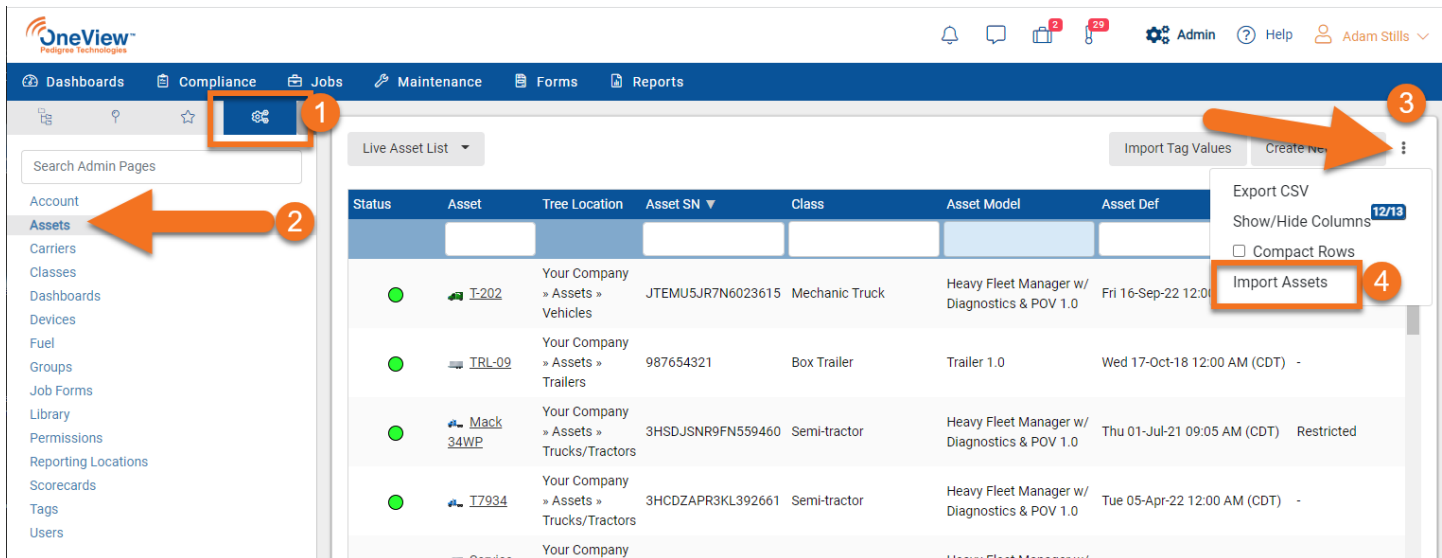
Don't re-import the full file again, put only the corrected users into a new csv template to upload.

Importing Assets

Admin users can upload a list of new assets through the asset import tool on the Assets page or use the Bulk Imports page.

To import from the **Assets** page:

1. Click the admin tab
2. Click the assets page
3. Click the ellipsis menu
4. Click Import Assets

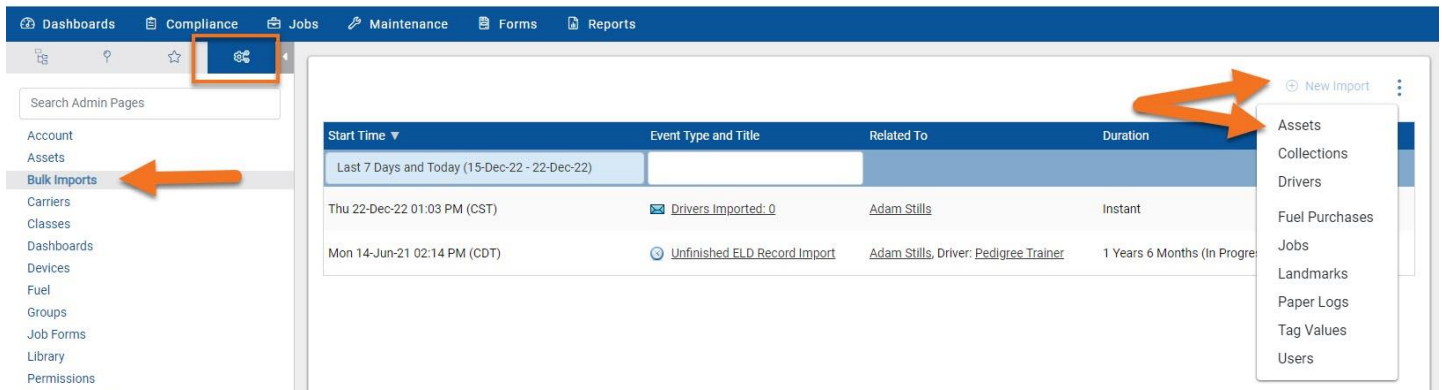


The screenshot shows the OneView interface with the Admin tab selected. The Assets page is visible in the sidebar. The ellipsis menu is open, and the Import Assets option is highlighted.

Status	Asset	Tree Location	Asset SN	Class	Asset Model	Asset Def
●	T-202	Your Company » Assets » Vehicles	JTEMU5JR7N6023615	Mechanic Truck	Heavy Fleet Manager w/ Diagnostics & POV 1.0	Fri 16-Sep-22 12:00
●	TRL-09	Your Company » Assets » Trailers	987654321	Box Trailer	Trailer 1.0	Wed 17-Oct-18 12:00 AM (CDT) -
●	Mack 34WP	Your Company » Assets » Trucks/Tractors	3HSDJ5NR9FN559460	Semi-tractor	Heavy Fleet Manager w/ Diagnostics & POV 1.0	Thu 01-Jul-21 09:05 AM (CDT) Restricted
●	T7934	Your Company » Assets » Trucks/Tractors	3HCDZAPR3KL392661	Semi-tractor	Heavy Fleet Manager w/ Diagnostics & POV 1.0	Tue 05-Apr-22 12:00 AM (CDT) -

To import from the **Bulk Imports** page...

1. Click the admin tab
2. Choose Bulk Imports.
3. Choose the New Import option on the far right.
4. Choose Assets from the dropdown.

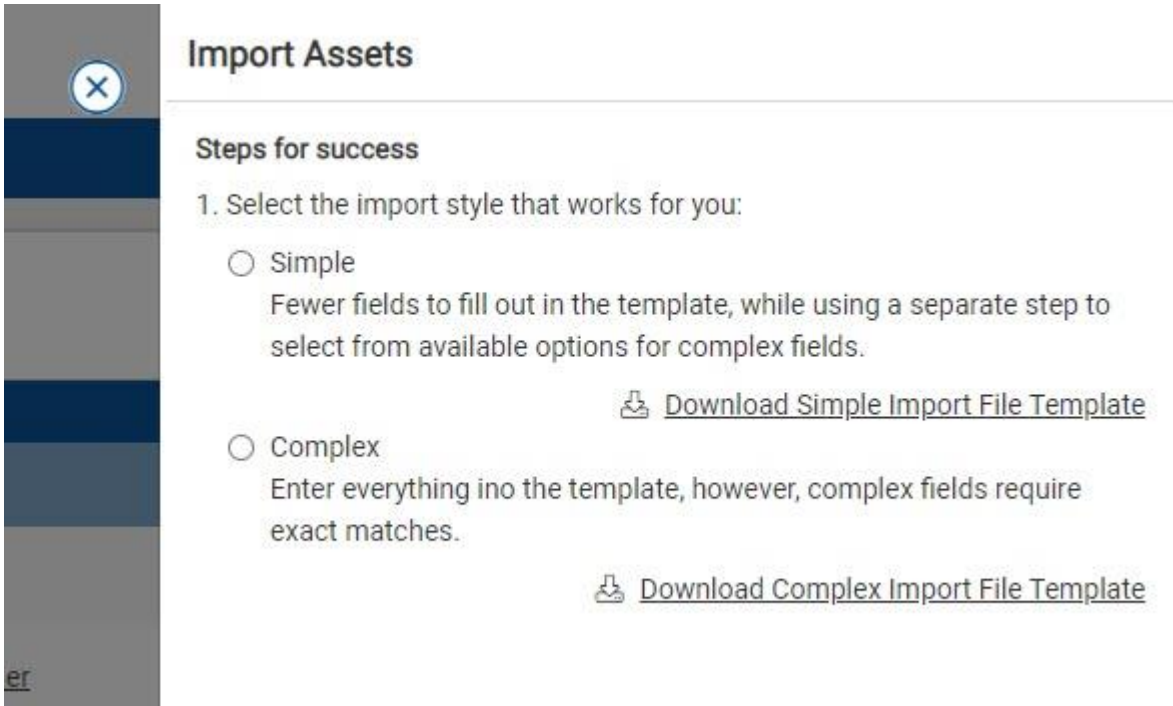


The screenshot shows the OneView interface with the Admin tab selected. The Bulk Imports page is visible in the sidebar. The New Import option is clicked, and the Assets option is selected from the dropdown.

Start Time	Event Type and Title	Related To	Duration
Last 7 Days and Today (15-Dec-22 - 22-Dec-22)			
Thu 22-Dec-22 01:03 PM (CST)	Drivers Imported: 0	Adam Stills	Instant
Mon 14-Jun-21 02:14 PM (CDT)	Unfinished ELD Record Import	Adam Stills, Driver: Pedigree Trainer	1 Years 6 Months (In Progre

Simple vs. Complex Import

There are two types of imports that you can choose from. The **Simple** import is a simplified csv template and the **Complex** import allows for more flexibility with the asset details.

The screenshot shows a modal window titled "Import Assets" with a close button (X) in the top left corner. Below the title is a section "Steps for success" containing a numbered list. Item 1 says "1. Select the import style that works for you:". There are two radio button options: "Simple" and "Complex". The "Simple" option is selected. Below "Simple" is the text "Fewer fields to fill out in the template, while using a separate step to select from available options for complex fields." and a link "Download Simple Import File Template" with a download icon. Below "Complex" is the text "Enter everything into the template, however, complex fields require exact matches." and a link "Download Complex Import File Template" with a download icon. A partial "er" is visible at the bottom left of the modal.

Import Assets

Steps for success

1. Select the import style that works for you:

☒ Simple
Fewer fields to fill out in the template, while using a separate step to select from available options for complex fields.
[Download Simple Import File Template](#)

☐ Complex
Enter everything into the template, however, complex fields require exact matches.
[Download Complex Import File Template](#)

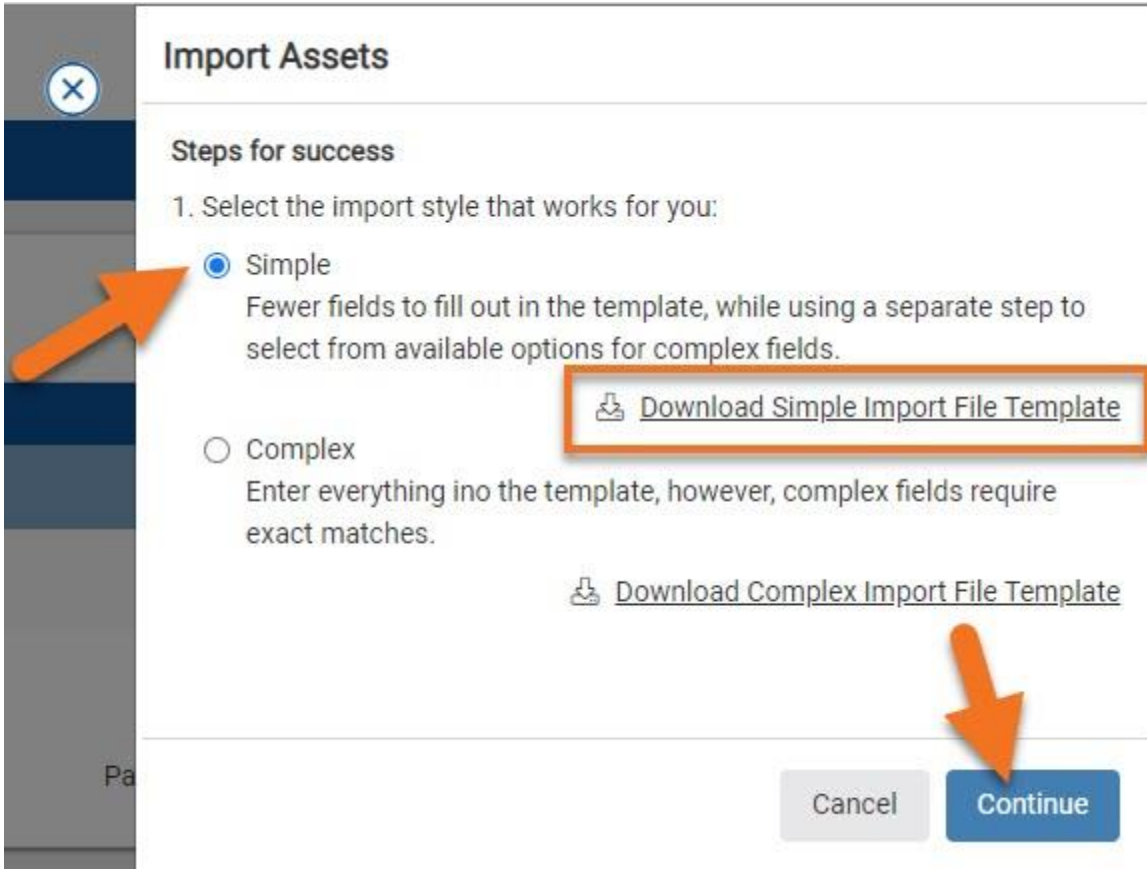
er

Considerations:

The simple import template does not include asset class so all assets uploaded will be the same class as chosen in the upload window. The complex template has a column for the asset class so you can upload many different asset classes in the same template.

Simple Import Template

Check the simple option and then Continue. There is a template download on this screen or you can also download the template on the next screen.



Import Assets

Steps for success

1. Select the import style that works for you:

☒ **Simple**
Fewer fields to fill out in the template, while using a separate step to select from available options for complex fields.


☐ **Complex**
Enter everything into the template, however, complex fields require exact matches.

[Download Simple Import File Template](#)

[Download Complex Import File Template](#)

[Cancel](#) [Continue](#)

On the Import Assets screen, the left side of the window includes the template file that you can download. There is a chart that shows which columns in the template are required (True), and which columns are optional (False). Any formatting that is required is also demonstrated in the chart, such as the formatting of the year or installation date, and what to put in the life cycle column - most often that will be Live as you are most likely uploading live assets.




Import Assets

Steps for success

1. Download the [import file template](#)
2. Ensure your data has the required fields and formatting as shown below and import your file.
3. Make selections applicable to all records uploaded.
4. Begin import

Fields	Required Format	Required
Name	-	True
Description	-	False
Serial Number/VIN	17 characters	False
Make	-	False
Model	-	False
Year	yyyy	False
License Plate	-	False
License Jurisdiction	-	False
Life Cycle	PRE, LIVE, RETIRED, or DELETED	False
Device Name	-	False
Install Date	m/d/yyyy	False


File Upload*




File Upload
Select a file or drag to upload

Required Selections


Select Region*



Class*



Asset Model*



Download the template and add the asset details.


	A	B	C	D	E	F	G	H	I	J	K	L
1	* Name	Description	Serial Number/VIN	Make	Model	Year	License Plate	License Jurisdiction	Life Cycle	Device Name	Install Date	
2												
3												
4												
5												
6												
7												

Note: Devices can be assigned to the asset after import and can be left blank in this import, plus the install date can be left blank. Only the starred columns are required.

File Upload


When you are finished filling out the template, the right side of the Import window includes the File Upload field. Choose the asset list you've created. The file **MUST** BE A CSV.

File Upload*



File Upload


Select a file or drag to upload




Required Selections

File Upload*

Asset Import Simple Template (1).csv



Upload Complete ×




The csv will be uploaded into a single region. Select the region from the Region field. Bring up your tree or search for the region by name.

Consideration: If you are uploading users into multiple regions, a separate upload is needed for each region.


Required Selections

Select Region*



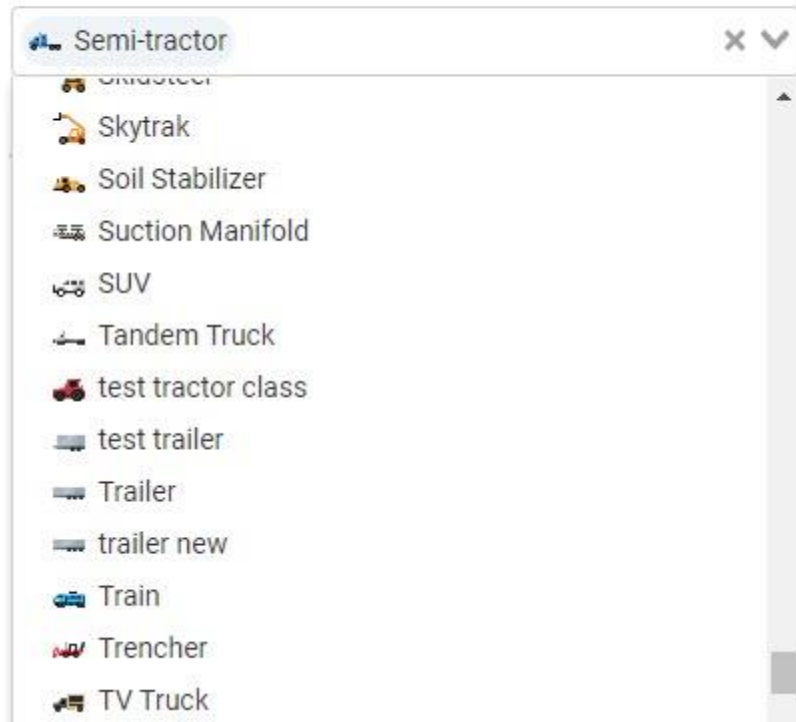
Assets ×

Type to Search...

Open Tree to Select 

Select the class you want to use for all assets. (The complex upload template includes class so you can assign different classes to each asset).

Class*



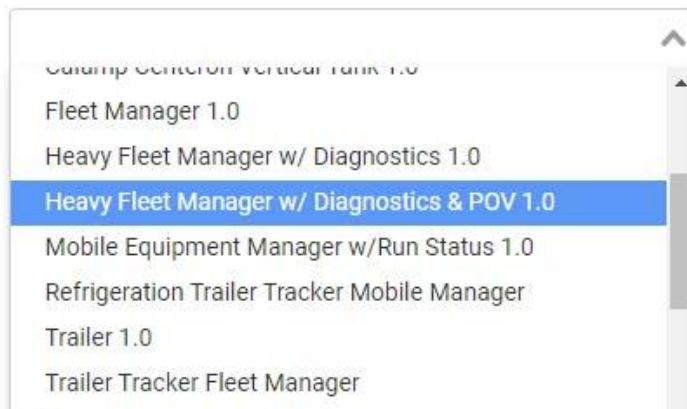
Consideration:

If the upload contains multiple asset classes, you may want to use the complex import since there is a column in the complex template for class.

Asset Model

Select the asset model to assign all of the assets in this upload. If you don't know the asset model of the devices that you are installing or if you have not installed the assets yet and are simply uploading them prior to installation, you can check your device asset models on the admin devices page ([see explanation below](#)).

Asset Model*



Considerations:

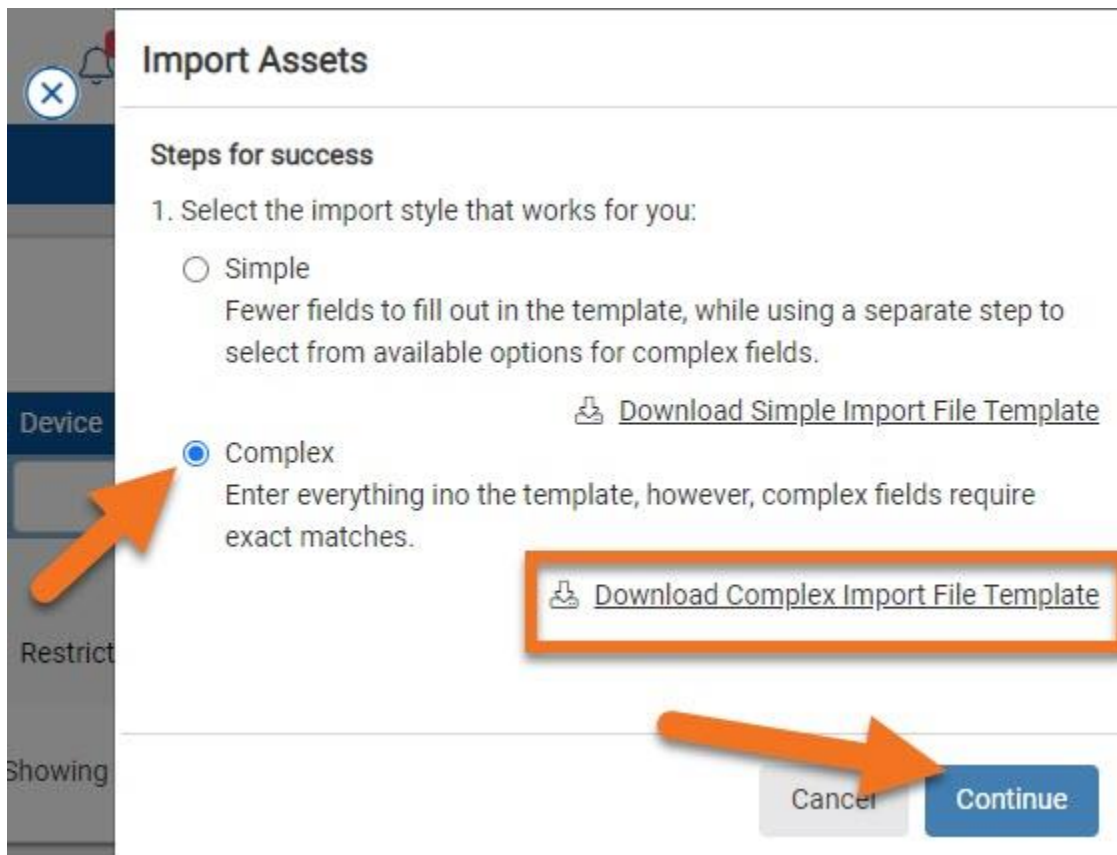
If there are multiple asset models in your upload, you may want to use the complex import as the asset model is a column in the complex template.

After you finish with these fields, choose Import at the bottom right.




Complex Import

Choose the Complex option and download the template (or you can download the template on the next window) then choose Continue.



On the Import Assets screen, the left side of the window includes the template file that you can download. There is a chart that shows which columns in the template are required (True), and which columns are optional (False). Any formatting that is required is also demonstrated in the chart, such as the formatting of the year or installation date, and what to put in the life cycle column - most often that will be Live as you are most likely uploading live assets.




Import Assets

Steps for success

1. Download the [import file template](#)
2. Ensure your data has the required fields and formatting as shown below and import your file.
3. Make selections applicable to all records uploaded.
4. Begin import

Fields	Required Format	Required
Name	-	True
Description	-	False
Serial Number/VIN	17 characters	False
Make	-	False
Model	-	False
Year	yyyy	False
License Plate	-	False
License Jurisdiction	-	False
Life Cycle	PRE, LIVE, RETIRED, or DELETED	False
Device Name	-	False
Install Date	m/d/yyyy	False
Class	-	True
Asset Model	-	True


File Upload*



File Upload
Select a file or drag to upload

Required Selections

Select Region*



Cancel

Import

Download the template and add the asset details.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	* Name	Description	* Class	Serial Number/VIN	Make	Model	Year	License Plate	License Jurisdiction	* Asset Model	Life Cycle	Device Name	Install Date
2													
3													
4													
5													
6													


Considerations

The starred columns are required. All assets uploaded will be imported into the same region. If the assets need to be in multiple regions, use a csv for each region of assets imported.

File Upload

When you are finished filling out the template, the right side of the Import window includes the File Upload field. Choose the asset list you've created. The file MUST BE A CSV.

File Upload*




File Upload

Select a file or drag to upload

Required Selections

File Upload*

Asset Import Complex Template (1).csv



Upload Complete ×


Required Selections

The csv will be uploaded into a single region. Select the region from the Region field. Bring up your tree or search for the region by name.

Consideration: If you are uploading users into multiple regions, a separate upload is needed for each region.

Required Selections

Select Region*



Assets ×

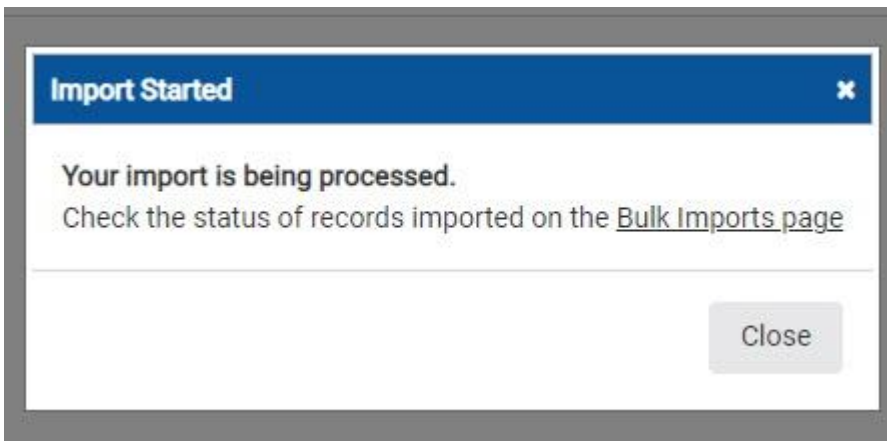
Type to Search...

Open Tree to Select

After you finish with this field, choose Import at the bottom right.

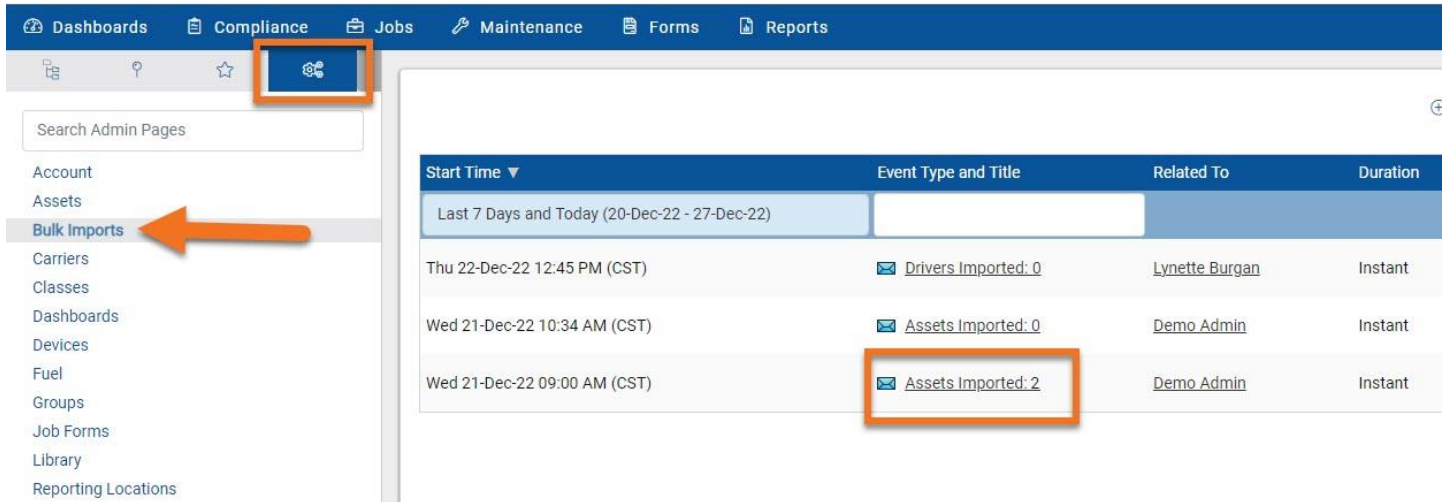


After your import is done, you can go to the Bulk Imports page to view the success of the upload. The conformation window of the upload has a quick link to the bulk imports page. If you're already on that page, you can just Close this message.



On the Bulk Imports page, you will find any upload events for any bulk import so you can check the status of the upload.

Find the event by date/time order of their upload, and use the event filter to find specific kinds of imports. You will be able to see how many assets were successfully uploaded. If that number doesn't match your spreadsheet, click on it to view the failure file.



Start Time ▼	Event Type and Title	Related To	Duration
Last 7 Days and Today (20-Dec-22 - 27-Dec-22)			
Thu 22-Dec-22 12:45 PM (CST)	✉ Drivers Imported: 0	Lynette Burgan	Instant
Wed 21-Dec-22 10:34 AM (CST)	✉ Assets Imported: 0	Demo Admin	Instant
Wed 21-Dec-22 09:00 AM (CST)	✉ Assets Imported: 2	Demo Admin	Instant

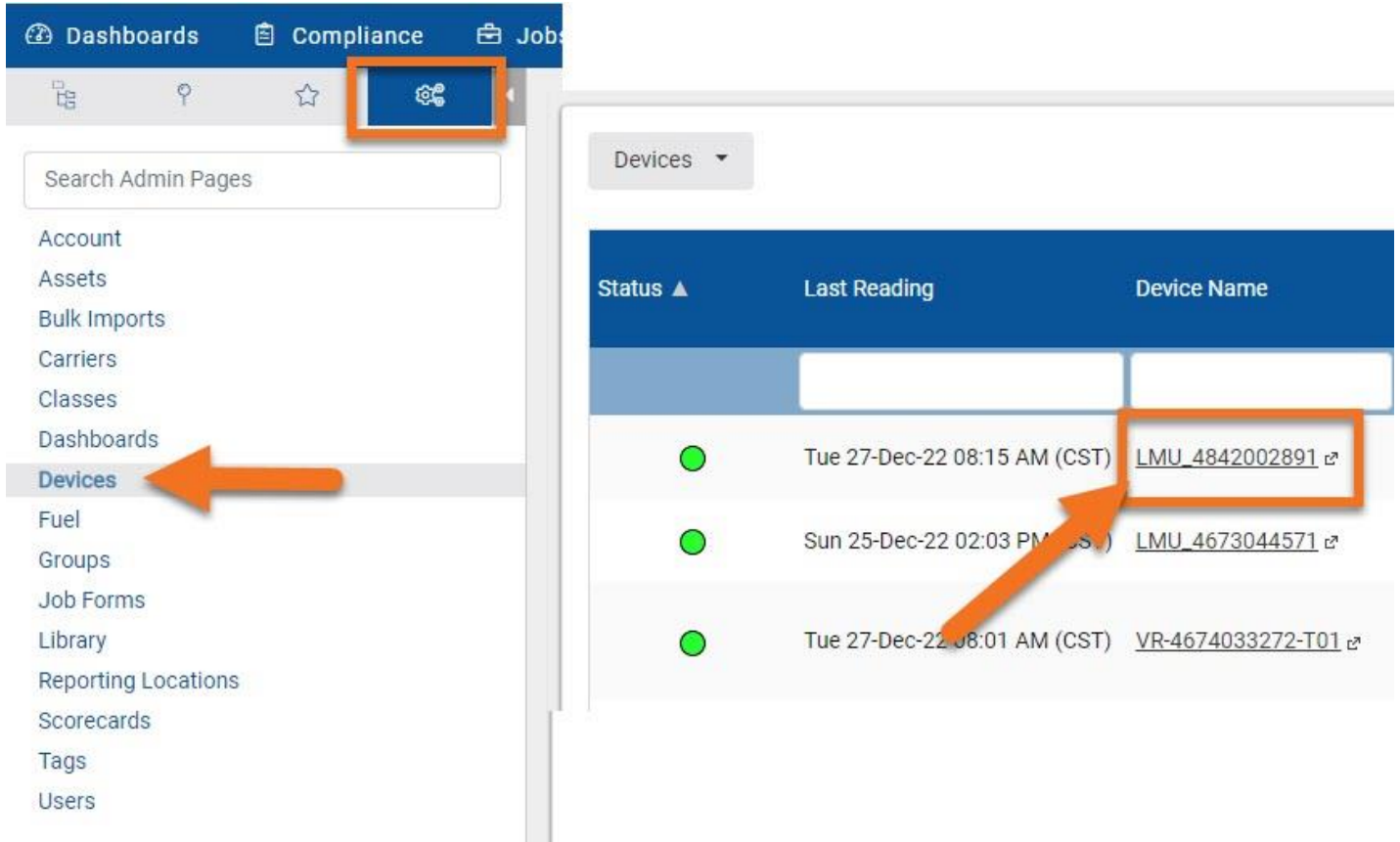
The failure file will show which assets didn't upload and will give you the reason. This example shows that the asset didn't have a name (N/A is not recognized as a name).

	A	B	C	D	E	F	G
1	Item	Failure Reason					
2	N/A	Required column header not included: Name					
3							
4							

Create a new csv with the failed assets and make sure to add the corrected information. Don't upload the original file again as some of those assets have been successfully added and it will fail to try to add them again.

Find Asset Model of Device

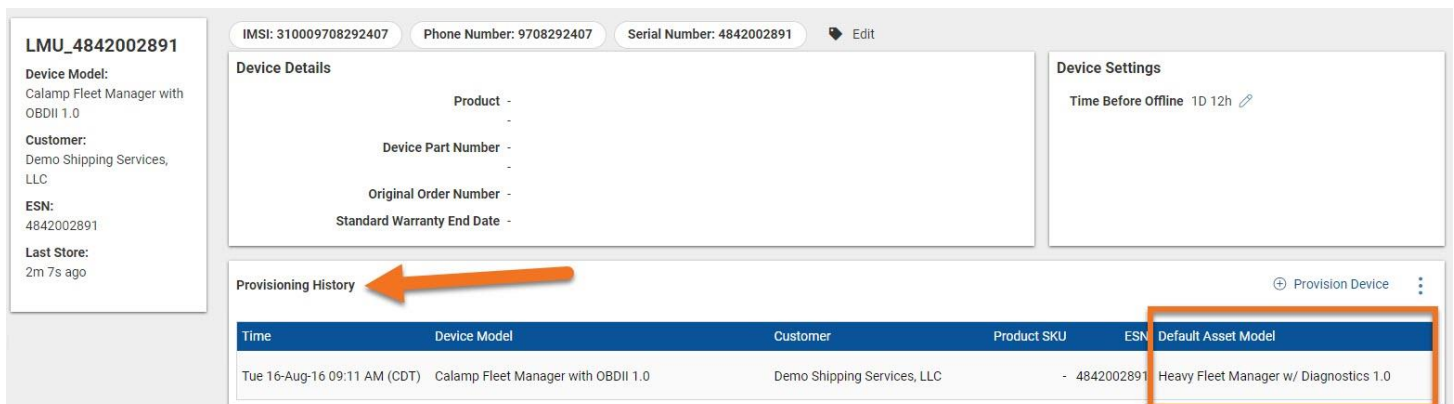
- To find the asset model of your devices:
- Click on the Admin tab
- Click on Devices
- Click on one of the devices you will be installing from the Devices list (or change the Devices list to Unassigned devices if you've received new devices that are different than your current devices).



The screenshot shows the OneView Admin interface. On the left is a navigation menu with options: Account, Assets, Bulk Imports, Carriers, Classes, Dashboards, **Devices** (highlighted with an orange arrow), Fuel, Groups, Job Forms, Library, Reporting Locations, Scorecards, Tags, and Users. Above the menu is a search bar labeled 'Search Admin Pages'. At the top of the main content area is a 'Devices' dropdown menu. Below it is a table with columns: Status, Last Reading, and Device Name. The table contains three rows of device data. The first row is highlighted with an orange box around the 'Device Name' column, which contains the link 'LMU_4842002891'. An orange arrow points from this link to the 'Provisioning History' section in the next screenshot.

Status	Last Reading	Device Name
●	Tue 27-Dec-22 08:15 AM (CST)	LMU_4842002891
●	Sun 25-Dec-22 02:03 PM (CST)	LMU_4673044571
●	Tue 27-Dec-22 08:01 AM (CST)	VR-4674033272-T01

On the device's data page, find the Provision history section and look at the Default Asset Model. This is the asset model to select in the drop down.



The screenshot shows the device data page for 'LMU_4842002891'. At the top, there are fields for IMSI, Phone Number, and Serial Number. Below this is a 'Device Details' section with fields for Product, Device Part Number, Original Order Number, and Standard Warranty End Date. To the right is a 'Device Settings' section with a 'Time Before Offline' field. Below these sections is a 'Provisioning History' section, highlighted with an orange arrow. It contains a table with columns: Time, Device Model, Customer, Product SKU, ESN, and Default Asset Model. The first row of the table is highlighted with an orange box around the 'Default Asset Model' column, which contains the text 'Heavy Fleet Manager w/ Diagnostics 1.0'.

Time	Device Model	Customer	Product SKU	ESN	Default Asset Model
Tue 16-Aug-16 09:11 AM (CDT)	Calamp Fleet Manager with OBDII 1.0	Demo Shipping Services, LLC	-	4842002891	Heavy Fleet Manager w/ Diagnostics 1.0