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Company Admin

If you've been designated as an admin user for your company’s OneView account there will be an ‘Admin’ tab in the top menu bar (shown above). This document will walk through the additional functionality provided to admin users.

Assets

Create New Asset

When users click the ‘Admin’ tab, the ‘Assets’ section is initially selected. From the Assets section you can create a new asset, view your live, pre-installed, and retired assets, as well as administer your assets tree.

If you're creating a new assets because you have new devices that were installed, please contact Pedigree Technologies’ Tech Support to ensure that the ESN of that device is provisioned correctly.
Phone: 701-499-0010 | Email: support@pedigreetechnologies.com

Asset Life Cycle

The ‘Admin >> Assets’ page is split into three stages (Live, Pre-Installed, Retired) in order to create a nice, clean, view of your active assets and to maintain historical data from retired assets.

**Live (list of active assets)**

‘Live’ is the stage initially visible upon visiting the ‘Admin >> Assets’ page. An asset moved from ‘Pre-Installed’ to ‘Live’ will make it available, to all users, in the sidebar assets tree. It will also be available for use in dashboard modules, jobs, reports, etc.

**Pre-Installed (list of uninstalled assets)**

This is where assets start out before they’re fully up and running. It’s a list of assets that haven’t been installed yet. *This area is used by Pedigree Support.*

**Retired (list of inactive assets)**

Once retired, an asset is no longer available to users. Admin users, however, can still access some features.
Live Stage
(Assets available to all users)
Once a device has been fully installed it will be moved to the ‘Live’ stage where it will now be available in the Assets Tree and will be available to all users for viewing asset details, running reports, assigning jobs/maintenance and everything else a regular asset can do.

Pre-Installed Stage
(Assets, with limited functionality, available to admin users only)
This stage is mostly used by the Pedigree Support team. For you, it’s a list of your assets that have yet to be installed. *Pre-Installed assets won’t be visible in the sidebar Assets Tree. The Pre-Installed stage is a partial setup for your assets until the device has been installed and Pedigree support has been notified. To complete the setup, Pedigree support will assign the asset to an actor class (type of vehicle/asset) and will move it to ‘Live’ status.

Retired Stage
(Assets, with limited functionality, available to admin users only)
Assets can be retired if they’re sold or are no longer in use. The device can be taken off a retired asset and re-provisioned, with the help of Pedigree support, to be installed on another asset. Once an asset is retired, it won’t be available in the sidebar Assets Tree and can’t be accessed by regular users. Admin users can still access the asset’s details page either from the Retired Assets List or by using the asset search with the ‘Include Retired’ option checked.

A few other things about retired assets:
- They no longer update nor collect new data
- They can’t be retired if the asset is the target of a new or in-progress Job/Maintenance (completed Jobs/Maintenance will retain information about retired assets)
- They can’t be added to new Jobs/Maintenance
- They can be individually included in reports (by Admin users only)

Retiring An Asset:
Admin users can easily retire an asset by simply right-clicking on an asset in the sidebar assets tree and selecting ‘Retire’ from the menu.

Editing Life Cycle Stage:
There are two methods to edit the Life Cycle of an asset:
(typically you’ll only need to ‘retire’ an asset)
1. Click on an asset in the sidebar tree to view that asset’s details page, then click ‘Configure’ on the right of the page
2. Right-click on an asset in the sidebar assets tree and choose ‘Configure’

Once on the configure page for the asset, the Life Cycle stage can be edited by selecting ‘Edit’ on the bottom of the asset details panel (Name, Life Cycle, Description, etc).
Deleting an Asset (use ‘Retire’ instead)

With the availability to retire an asset, **deleting isn’t necessary and shouldn’t be done**. Deleting an asset will completely remove it from OneView and will cause information to be lost. The only location an asset can truly be deleted from is right-clicking on an asset in the Admin >> Assets >> Admin Tree.

Exporting Asset Lists to CSV

An additional feature of the Asset Lists (Live, Pre-Installed, and Retired), is the ability to export any of those lists, or user/driver lists, as a CSV file which can be used to easily sort, count, and analyze your assets. **Note: if you have filtered to narrow your results (see next section) the exported file will only include your filtered selections.**
Asset Filter
Each asset page has a filter option to help search for assets by multiple fields.

Click Column Head to Filter Alpha-Numeric
Click any column head to filter in alpha-numeric order (0-100, A-Z). Click a second time to reverse the order (100-0, Z-A).

Filter Fields
In the white filter fields, click to use the dropdown and choose a filter option, or type in the blank field to filter matching keywords.
Creating New Tags

1. Click on the Admin Tab.
2. By default you’ll be in the Assets section of the Admin area. On the right, click the View Tags button.

3. The Registered Tags window will open showing all existing tags. There are four global tags that can’t be edited or removed (Make, Model, Serial Number, and Year).
4. To create a new tag click the ‘Add Tag’ button in the lower-left corner. This will create a new line where you can type in the name of your tag and then decide if you want the tag values to display in the asset card (see below). The External ID option is currently used for Driver ID only, leave it unchecked.

5. Then decide what asset class you will assign the tag to. When you’re done, click Save to finish creating your new tag. The tag will now be available to use where tags are found (asset configure page, user information page).
Create New Tag on Asset Page
You can also add a tag directly on an asset or user’s page.

1. Click on the plus button at the top of an object’s page.

2. Choose the add tag button at the bottom of the window.

3. Follow steps 4 & 5 above.
Add a Tag
Any object in OneView can have tags assigned to it. The easiest way to assign a tag is to click on the object (like a user or asset) and use the plus button at the top of the page.

1. Click on the plus button at the top of the page.

2. Fill in the tag field(s). You can leave tag fields blank, not all fields have to be filled in.

3. Click save at the bottom.
Creating a New Actor Class (and map icon colors)

1. Click on the Admin Tab.

2. By default you’ll be in the Assets section of the Admin area. On the right, click the View Actor Classes button.

3. The View Actor Classes window will display. Select the Create New button to create a new Actor Class (icon and colors). If an Actor Class had previously been created, you can select the Edit button after the actor class to edit the icon and/or colors. (Note that you cannot edit global actor types)

4. Enter a name for the new Actor Class and select an icon set. The Icon set will display on the page and the user can make the color changes needed using the Background and Foreground color selectors.

5. Note that only the Map Icon colors can be changed.
6. Add a Custom Inspection if this new actor class has a custom inspection form. See your account manager about the process of having a custom inspection form created for any of your asset’s DOT inspection requirements.

### Renaming an Asset

1. **Right-click** on an asset from the Asset Tree in sidebar on the left side of the window. Then select **Rename**.
2. The edit box will pop up around the Asset’s current name. Edit the name as desired.
Moving a Single Asset

1. **Right-click** on an asset from the Asset Tree in sidebar on the left side of the window. Then select **Move**.
2. Next, click on the new region that the asset should be moved into. The asset will then appear in that region of the asset tree. *In the example below we’re moving Service Truck 102 from Vehicles to the Trucks/Tractors region.*

Moving Multiple Assets

1. Right click on one of the assets you would like to move.
2. Select **Move** +
3. From the Asset Tree pop up window, check the assets you want to move and click next. **Note: Select the assets that are moving into the same region. You may have to repeat this process if moving multiple assets to multiple regions.**
4. Select the Region to move the selected assets to and click **Done**.
Editing Asset Details

1. **Right-click** on an asset from the Asset Tree in sidebar on the left side of the window. Then select **Configure**.
2. On the lower-left side of the configure page, click **Edit** to change any of the fields listed below.

**Name**: Users can change the name of an asset here.

**Life Cycle**: Choose from Live, Pre-Installed, Retired (typically you will only need to retire an asset from ‘Live’)

**Parent**: Choose/change which folder this asset will be in

**Description**: This can be used for additional information on the asset.

**Actor Class**: This allows a user to choose an icon set/asset class appropriate for the asset they are monitoring. See examples on the next page (more are added all the time)

**Location**: Not needed

**Latitude**: Not needed

**Longitude**: Not needed

**Tags**: Tags can be used to add additional information across your assets. Examples: Make, Model, Year, etc.

**Asset/Actor Class Icons**: For a complete list of Avatars/Actor Class icons, see the Avatar List in the help tab.
Right-Click to Create Assets, Regions, and more

When admin users right-click on an asset or region and select Create there will be three options: Asset, Region, Landmark here. Please see below for how to use each on these three options.

**Right-Click >> Create >> Asset**

NOTE: If you have new Assets that were installed please contact Pedigree Technologies Tech Support to ensure that the ESN of that device is provisioned correctly. Email: support@pedigreetechnologies.com – Phone: 701-499-0010

**Right-Click >> Create >> Region**

Regions will organize Assets for everyone within your company. Assets can be broken out by type, grouped by locations/purpose/function or any other combination that makes the most sense for your business. Regions can also be created within the User sections. This will help to keep users organized by job such as dispatchers, drivers, etc.

1. **Right-click** on the asset or an existing region from the Menu Tree on the left side of your OneView account. Then hover over Create and select Region.
2. This will cause the new region to pop up and allow the user to name it anything you would like.

**Right-Click >> Create >> Landmark Here**

This allows you to create a landmark based on the current location of an asset.

1. **Right-click** on the asset from the Menu Tree then hover over Create and select Landmark Here.
2. The create landmark window will appear and you can fill in the remaining fields before clicking Submit.
Devices

The second tab is Devices. These sub-tabs show the devices that are provisioned to this customer.

Device Summary: view how many devices of each model have been provisioned to this customer. These lists are exportable to CSV.

<table>
<thead>
<tr>
<th>Device Model A</th>
<th>Assigned</th>
<th>Unassigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Android Tablet</td>
<td>0</td>
<td>12</td>
</tr>
<tr>
<td>Calamp Fleet Manager 1.0</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Calamp Fleet Manager with OBDII 1.0</td>
<td>2</td>
<td>0</td>
</tr>
</tbody>
</table>

SKU A | Assigned | Unassigned |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Status</th>
<th>Last Reading</th>
<th>Device Name</th>
<th>Linked Asset</th>
<th>Asset Lifecycle Status</th>
<th>Device Model</th>
<th>Device Prov</th>
<th>Order Number</th>
<th>Skip Date</th>
<th>SKU</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️</td>
<td>03:25 PM 09/24/2018</td>
<td>LMU-4549032941</td>
<td>TEST</td>
<td>Live</td>
<td>Calamp Fleet Manager 1.0</td>
<td>03:25 PM 09/24/2018</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>✔️</td>
<td>10:51 AM 08/14/2015</td>
<td>LMU-4541000735</td>
<td>Counter Van 22</td>
<td>Live</td>
<td>Calamp Fleet Manager with OBDII 1.0</td>
<td>10:51 AM 08/14/2015</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>✔️</td>
<td>02:42 PM 03/13/2019</td>
<td>LMU-4588107397</td>
<td>SigNet1</td>
<td>Live</td>
<td>Calamp Fleet Manager with OBDII 1.0</td>
<td>02:42 PM 03/13/2019</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Devices: a list of all the devices and what asset they are linked to. All column heads are clickable to sort.

Status: Green = received a reading in the last hour from this device. Gray = have not received a reading in the last hour (do NOT necessarily mean offline like the regular gray status badge on assets)

Last Reading: date and time of the last reading received from this device

Device name: The ESN or LMU number of the device

Linked Asset: The name of the asset this device is linked to or installed in

Asset Lifecycle Status: Live, Pre-installed, or Retired

Device Model: The model of the device

Device Prov: the date and time this device was provisioned to this account

Unassigned Devices: a list of devices that are currently not assigned to an asset. If the device was assigned to an asset at one time, you will see the last linked asset and when it was last linked.
**Mobile Devices:** a list of all the tablets that have been provisioned to this company. This list will include all past devices ever used/provisioned to this company.

<table>
<thead>
<tr>
<th>Status</th>
<th>Last Reading</th>
<th>Device Name</th>
<th>OS Version</th>
<th>Software Version</th>
<th>User</th>
<th>Vehicle</th>
<th>Mobile Make</th>
<th>Mobile Model</th>
</tr>
</thead>
<tbody>
<tr>
<td>09:13 AM 03/11/2019</td>
<td>54476511400007</td>
<td>5.0</td>
<td>4.46.3</td>
<td>Zachary Berg</td>
<td>Zac</td>
<td>CalAmp</td>
<td>MOT7P</td>
<td></td>
</tr>
<tr>
<td>09:04 PM 05/23/2018</td>
<td>40357e5-9ff4-4551-8448-1098164da656</td>
<td>5.1.1</td>
<td>4.27.4</td>
<td>Christ Johnson</td>
<td>Western Star 255</td>
<td>Samsung</td>
<td>GT-R1110</td>
<td></td>
</tr>
<tr>
<td>04:10 PM 03/08/2019</td>
<td>190751d3332332</td>
<td>5.0</td>
<td>4.46.3</td>
<td>Troy Boerstel</td>
<td>Tractor 20</td>
<td>CalAmp</td>
<td>MOT7P</td>
<td></td>
</tr>
</tbody>
</table>

**Status:** Green = received a reading in the last hour from this device. Gray = have not received a reading in the last hour.

**Last Reading:** date and time of the last reading received from this tablet

**Device name:** The ESN number of the tablet

**OS Version:** The current version of the Android Operating system running on this tablet

**Software Version:** The current version of POV running on this tablet

**User:** The last user to login to this tablet

**Vehicle:** the last vehicle this driver linked to from this tablet

**Mobile Make:** The brand of this tablet

**Mobile Model:** The model of this tablet

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Jobs/Forms (not used at this time)

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Users

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**Setting up a User/Driver**

1. Click on the Admin tab >> select 'Users' >> click Create New User
2. The **General Information** screen will display. All the fields with asterisks next to them are required.

- **Customer**: This field shows the Companies name the User/Driver will be added to.

- **Username**: *(required field)* Place the user/drivers username here. This will be the user/driver login. **Note**: The username must be unique to the system globally. If the username you choose is already taken anywhere else in the system, you’ll be asked to choose a different username.

- **Email Password Setup**: *(optional)* check this box and the system will send the user an email for setting their own password. **Note**: This email is active for 1 week only.

- **Password**: *(required field)* Enter the password the user/driver will be using to log into the OneView or POV. **Note**: If you have multiple drivers each driver should have a unique password.

- **Confirm Password**: *(required field)* Re-enter the password the user/driver will use to log into OneView or POV.

- **First Name**: *(required field)* Type in the first name as it should display in the system.

- **Last Name**: *(required field)* Type in the last name as it should display in the system.

- **Email**: Enter an email address for this user *(optional)*. If your username is also an email address, this field will automatically populate.

- **Work Phone**: Place the work phone number here if it was provided. **Note**: When entering a phone number enter it in the following format 7015551212. Please do not use spaces or dashes.

- **Cell Phone**: Place the cell phone number here if it was provided. This is the phone number that the user will be notified via text message alerts.

- **Cell Phone Provider**: Select the cell phone provider/carrier from the dropdown list. This is required for notifying users via text message alerts.

- **Class**: *(required field)* In the drop-down list, select the proper user type. Example: User, User Driver, User Girl, etc.

- **Time Zone**: Set the home office time zone for the user/driver. (This will establish the time zone for the driver’s log book.)

- **Parent**: Select the region folder to add this user – i.e. Drivers folder. You can choose any region in your asset tree.

- **Active**: Place a checkmark in this box to make the user active in the system. Remove the checkmark in this box to make the user inactive in the system.

- **Groups**: Place a checkmark in front of driver if they will be using POV. **Note**: Once driver is selected additional Driver Information fields will display.

- **Tags**: Use the New Tag drop down menu to add tags to this user.
Driver Set Up

By checking the Driver group box, the Driver Information opens below the general information. Any user who will be driving any of your assets must have this driver information.

Driver Information

- **Driver's License**: (required) Enter the driver’s license number in just letters and numbers, no dashes.
- **Driver's License Issuing State**: From the drop down, choose the license’s state of issue.
- **Reporting Location**: Choose the driver’s home terminal reporting location from a dropdown list or create a new reporting location with the New Reporting Location button. (See Adding a Reporting Location on page 19.)
- **Driving Rule**: Select the HOS driving rule appropriate for the driver. Consult your compliance officer with questions.
- **Period Start Time (HH:MM:SS)**: This should be set to 00:00:00 unless the driver has a known different period start time. Consult your compliance officer with questions.
- **ELD Exempt Option**: Check this box to make signify this user is ELD Exempt. By checking the box, a reason field will appear. Enter a reason (required). Consult your compliance officer with questions.
- **24-hour Reset Option**: Some drivers qualify for a 24-hour reset option vs. the standard 34-hour reset. Check the box if the driver qualifies for the 24-hour reset. Consult your compliance officer with questions.
- **Waiting at Wellsite Option**: Check the box if the driver qualifies for the Waiting at Wellsite 5th line duty status. Consult your compliance officer with questions.
- **Supports Logbook Annotation**: Check the box if you want the driver to be able to annotate their past duty statuses to another duty status (NOTE: No driver is allowed to annotate from driving to a non-driving status). Note that the driver will still be able to make annotation to other information (tractor, trailer, place, odometer, etc.). Note that this only affects annotations on POV and not in OneView (that is a separate permission).
- **POV Screen Lock Enabled:** Check the box if you want the moving lock screen to be enabled. If enabled, the moving lock screen will prevent the user from using the mobile device (tablet or Smartphone) to do anything while the vehicle is moving. The exception is that if turn-by-turn directions were started before the vehicle was in motion they can continue to be used.

  *Note:* Please be aware that disabling the POV lock screen will allow drivers to use the tablet while the vehicle is moving. Use of a phone while a commercial vehicle is moving is prohibited by the FMCSA, [http://www.fmcsa.dot.gov/rules-regulations/administration/rulemakings/rule-programs/rule_making_details.aspx?ruleid=347](http://www.fmcsa.dot.gov/rules-regulations/administration/rulemakings/rule-programs/rule_making_details.aspx?ruleid=347)

- **16 Hour Big Day Option:** Check this box if a driver qualifies for the 16-hour exception. Consult your compliance officer with questions.

- **Personal Use of CMV Option:** Check this box to enable this status option, allowing the driver to choose this status on their tablet. Consult your compliance officer with questions.

- **Yard Move Option:** Check this box to enable the yard move option, allowing the driver to choose this status on their tablet. Consult your compliance officer with questions.

- **Allow California Meal Break Option:** Check this box to enable the California Employee Meal Break options on the driver’s tablet. Consult your compliance officer with questions.

- **Required Pre-trip Inspection:** Check this box to enable OneView to create missing pre-trip inspection violation events when drivers miss a pre-trip inspection on their tractor or trailer.

- **Required Post-trip Inspection:** Check this box to enable OneView to create missing pre-trip inspection violation events when drivers miss a pre-trip inspection on their tractor or trailer.

3. Click on **Save** and the User/Driver will be created in OneView

### Key-fob Setup

If your company has vehicles using the key-fob, assigning a key-fob to a user is done through a user tag called Driver ID.

1. Find the key-fob identification number (on the back of the fob).
2. On the user’s general information, use the tags field to choose Driver ID.
3. Enter the key-fob identification number.
4. Save your changes.
Editing a User/Driver and Changing Emails/Passwords

1. **Click on the Admin tab >> select ‘Users’ >> click the Configure button to the right of user’s name that needs edits or password reset.**

   ![Admin Users Interface](image)

   a. **Reset Password** – use this button to system generate an email to this user to reset their own password. This email will include a link that will stay live for 1 week only. If the user fails to reset their password in that time, you will need to repeat this process to send them another link.

   ![Reset Password Confirmation](image)

   b. **Configure** – use this button to edit a user’s information.

   ![User Information Screen](image)

   The following screen will pop up. Edit user/driver info accordingly.

   1. To change outdated information, click in the field and type over.
      a. To reset the password, either use the Reset Password button to send an email to this user for resetting their own password, or type the new password in the password text field the user would like. Then in the confirm password box retype the same password.
         **Note:** OneView doesn’t have specific requirements for passwords. **Each user should have a unique password.**
      b. To inactivate the user from the system, remove the checkmark in front of the Active box. This will also move the user to the ‘Inactive User List’.

   2. Then click on **Save** in the bottom right corner.
User Reset Password
Users can reset their own password on the login screen if they have their username. The system will send them an email that is only active for 1 hour, allowing them to reset their password.

Driver Reset Password
Drivers have a reset password button on the POV login screen. This will send an email to their account’s registered email (providing it is an active email address). They will need the ability to access that email to complete the reset process.

Users Lists
There are three user lists to provide a clear view of all active users, active drivers, and users who are no longer active. Each user list has its own CSV export option, to get the data out of the system for tracking, analyzing, and reconciliation purposes.

Active User List
The active users list displays all users (users, administrators, and drivers) who currently have access to OneView, POV, or both. Also displayed on this list is the group(s) to which each user is a member and the active date the user was added.
User List Filters

The user lists include a filter at the top that allows you to search through the list of users to find your results fast and easily.

Name: type at least 3 letters to start narrowing the list of results by first or last name using the Name field.

Username: type at least 3 letters or numbers to start narrowing the list of results by username.

Actor Class: Click the “Filter by Class” field to narrow the results by actor class (users classes are near the bottom of the list).
Groups: Click in the “Filter by Groups” field to select a group to include in your results.

Time Zone: Click in the “Filter by Timezone” field to narrow your results by timezone.

Active Date: Click in the Active Date field to use a calendar to choose a date range or specific date to filter your results by when users were added into OneView.

Column Heads Clickable to Sort
Click the column head to sort alpha-numeric or click a second time to sort reverse alpha-numeric.
Driver List

The Driver List displays only those in the ‘Drivers’ Group and displays all the attributes specific to drivers (Driving Rule, Start Period, Lock Screen, etc). A full list of driver attributes are listed in the ‘Setting up a User/Driver’ section. This list includes filters and bulk edit options.

Driver Filter

Whether you are simply looking for one particular driver, or want to bulk edit a number of drivers, the filters across the top allow you to narrow your selection results. (See previous section on User List Filters.)

Pages

You may have multiple pages of results. Look to the bottom to see the total.

Records Per Page

Change the number of records you see in your results per page.
**Driver Bulk Edits**

1. To edit driver options in bulk, first filter for the drivers you need to make changes to.
2. Check the All box at the top left if you are making changes to all the drivers in your result, or check individual driver’s check boxes from the left column if changing only select drivers.

---

**Note:** after add a filter like the above example, using the All check box on the left only selects the results. Without filtering as in the image below, the select all box will select every driver throughout all your pages of drivers.
3. After selecting the drivers, scroll to the option to add or remove and click on the column head edit pencil.

![Column head edit pencil](image)

4. Leave the box unchecked to remove an option or check the box to add the option and Save.

![Add and Remove Features](image)

**Inactive User List**

In addition to not being able to log into the system, inactive users are removed from the sidebar assets tree, collections, groups, alarms, and notifications. They also aren’t eligible to be added to any of those items while the user is inactive.

![Inactive User List](image)
A few other things about Inactive Users:

- A user can’t be made inactive if they’re the target or assignee of a Job or Maintenance. A prompt will alert you to the job(s) that are preventing the user from being made inactive.
- Admin users can access a user’s details page by clicking on their name in the Inactive Users List or by checking ‘Include Retired’ when searching assets.
  - Using the asset search and ‘Include Retired’ checkbox is how admin users can include Inactive users in reports.
- If a user’s access is restored, their tree location will be restored as will their inclusion in their previous groups.

Export Users/Drivers to CSV

Use the 3 dots menu and choose CSV to export any list of drivers or users and save to your computer.

Show/Hide Columns

Use the Show/Hide Columns option in the 3 dots menu (see above) to make changes to the order of the columns by dragging them in a different order, or remove a column by unchecking the box.
Groups

This tab allows Administrators to create, update, and delete users in groups that are setup. The groups can be used for maintenance notifications, jobs notifications, report delivery schedules, or for messaging.

Creating a New Group

1. Click on the Admin tab >> select ‘Groups’ >> click the Create New Group link

2. Then type the desired name in the Name field.
3. Add users to the group and then Save.

4. The group created will display under the Groups section.
Adding Users to a group

1. Click on the Group name.
2. Select the user(s) name(s).
3. Use the arrow to move user into group. Save.

Removing Users from a group

1. Click on the Group name. Then from the selected side, chose the name(s) to remove.
2. Use the arrow to remove names from the selected list and then Save.
Examples of where *Groups* could be useful:

**Messages:**
This displays all the groups available and allows the user to quickly send everyone within that group a message.

**Report Delivery Schedules:**
This displays all the groups available and allows the user to quickly send everyone within that group a report.

**Maintenance Notifications:**
If you are using the Maintenance portion of OneView you can send notifications out to user groups about the upcoming maintenance.

**Job Notifications:**
If you are using the Jobs portion of OneView to dispatch your drivers, job notifications can be sent out to groups.
Carriers

Most companies will only have one carrier or DOT number. If you ever need to add an additional carrier or DOT number, the Carrier tab allows you to do that.

Create a new Carrier

1. Click Admin >> Carriers >> then Carriers again, it should default to show Carriers

   ![Create Carrier Window]

In the Create Carrier window, fill in the required information and then Save.

![Create Carrier Form]

Reporting Location

In order to make sure automatic rule selection is works correctly for your company, your driver’s each need to be assigned a reporting location, even if you only have one for the entire company.

Admin level users with permissions for adding a reporting location will see a Carriers tab in their Admin area. You can use this tab to set up your reporting location(s) or use the New Reporting Location button on the driver’s set-up page.
Create New Reporting Location from Carrier’s Tab

1. Choose the Admin Tab
2. Choose Carriers from the sub-tabs at the top of the page.
3. Choose Reporting Locations
4. Choose Create new Reporting Location

Create Reporting Location Window

In the Create Reporting Location window

1. Name – add the name of the reporting location you want to create
2. Address – add the address of the location you want to use for the reporting location. You can also move the pin on the map to adjust the address if necessary.
3. Actor Class – leave as reporting location
4. Parent – this will default to “not in the tree” but if you would like your reporting location to show up in your asset tree, choose the folder through this dropdown by choosing “Select Parent”.
5. Save your location at the bottom right of this window.
The Account tab includes the customer’s account information that can be adjusted as necessary. You can set the support center for the customer through the edit window.

**Account**

**Account #:** Cannot change.

**Customer Name:** name of customer

**Description:** description of customer

**Address:** address of customer

**Address 2:** additional address field for PO box, suite number, etc

**City:** customer’s city

**State:** customers’ state or province

**Postal Code:** customer’s zip code or postal code

**Telephone Number:** customer’s phone number

**US DOT Number:** customer’s DOT number

**Timezone:** customer’s home terminal time zone

**Support Center:** Do not change.
Upload

Upload Fuel Purchases

1. Click on the Admin tab >> select 'Upload' >> click the Upload Fuel Purchases button.

2. The Upload Fuel Purchases window opens with the option to upload a file or download the template (shown below).

Fuel Purchases Template:

The required fields in the Fuel Purchases Template are marked with asterisks. If you have an export from a fuel card or another system, make sure the fields match up before uploading to ensure the upload is successful.

Note: for a fuel purchase to be associated with a vehicle and/or user, the vehicle name or user/driver name must match EXACTLY what is displayed in OneView.
3. Once a file has been uploaded, you can go to your Event History page to see the results (successes and failures) by clicking on the Fuel Purchases Imported event.

4. Click on the import failures to see which fuel data is missing. Add any missing information, resave and upload again. The Failure Import File will have a last column that shows you what the errors are.

   - **Input File** is your original uploaded file.
   - **Successful Import File** will show which fuel records were successfully uploaded into the system
   - **Failure Import File** will show you which fuel records failed to upload and the reason why listed in a new column.

**Create Fuel Purchase**

If you need to create a single fuel purchase, the Create Fuel Purchase button will allow you to add a fuel record in OneView just like driver’s do through POV. You can also upload the receipt if you have it.

1. Choose Admin >> Upload >> Create Fuel Purchase
2. Fill in the information on the Create Fuel Purchase window.

A – Driver: Add the Driver that made the fuel purchase.

B – Asset: Choose the asset that received the fuel.

C – Date: Use the calendar and time clock to add the date and time of the fuel purchase.

D – Merchant’s Name: Add the name of the merchant where the fuel was purchased.

E – Merchant’s Address: Add the address of the merchant or use the Search icon to find the merchant in your Landmark list.

F – State/Province: Add the state or province of the fuel purchase. Will only autofill from landmarks. Manually add it all other times.

G – Volume: Add the number of gallons or liters.

H – Total Cost: Add the total cost of fuel purchased, or add a zero if the fuel was from a company tank.

I – Product: Use the dropdown to choose the fuel type.

J – Receipt: If you have a receipt, scan it to your computer, then browse for the image and attach.

K – Invoice Number: (optional) Add an applicable invoice number.

Click Create to save this fuel purchase.

Check Event

After creating the fuel purchase, check the driver or the asset events to verify the fuel purchase.

Fri 12 Oct 2018 06:30 AM

Pedigree Trainer  Fuel Purchase: 2755 Brandt Drive S Farg - 20 gal.

Fri 05 Oct 2018 06:30 AM

Pedigree Trainer  Fuel Purchase: Holiday Station
Click on the fuel purchase to view the details and Edit if necessary. Admin users will have an Edit button in the upper left corner. Any fuel receipt that has been uploaded to this fuel record will have a View link to click on.