Using Hierarchy Attributes

Link: https://help.gpsinsight.com/docs/about-attributes/using-hierarchy-attributes/ Last Updated: February 11th, 2016

Attributes allow you to add custom, descriptive properties to individual hierarchy levels (nodes)–such as alert addresses, email lists, and timezones. When you apply an attribute to a hierarchy level, all members of that level (vehicles, drivers, landmarks and/or users) are automatically assigned to that attribute.

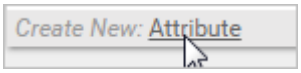
> **EXAMPLE**
> Company XYZ has several dispatch facilities in Arizona and Minnesota. XYZ's owner wants to specify an email list and a timezone for both facilities so that he can schedule reports that are formatted according to the proper timezone and are automatically sent to the email distribution list per facility.

To create and assign a timezone hierarchy attribute:

1. From the portal, click the **Account** menu, click **Manage Hierarchy**, and click **Describe with attributes**.

   The Manage Attributes page opens in a new browser tab.

1. At the bottom of the Attribute Definitions grid, click **Attribute** next to Create New.

   The Add New Attribute screen window appears.

1. Set the different properties for the attribute:
   - **Attribute Name:** Enter the user-friendly identifier for the attribute (e.g., Timezone).
   - **Attribute Type:** Select the check box(es) for each type this attribute supports. In the Company XYZ example, we're using this attribute for hierarchy only.
   - **Value Type:** Choose the data type that is allowed for this attribute. In the Company XYZ example, we chose Timezone.
   - **Treat as Category:** The timezone type automatically is treated as a category that is conveniently formatted for you.
   - **Account Visibility:** Select the check box(es) if you want other portal users on your account to see and use this attribute and/or edit this attribute.

1. Click **Save Attribute**.

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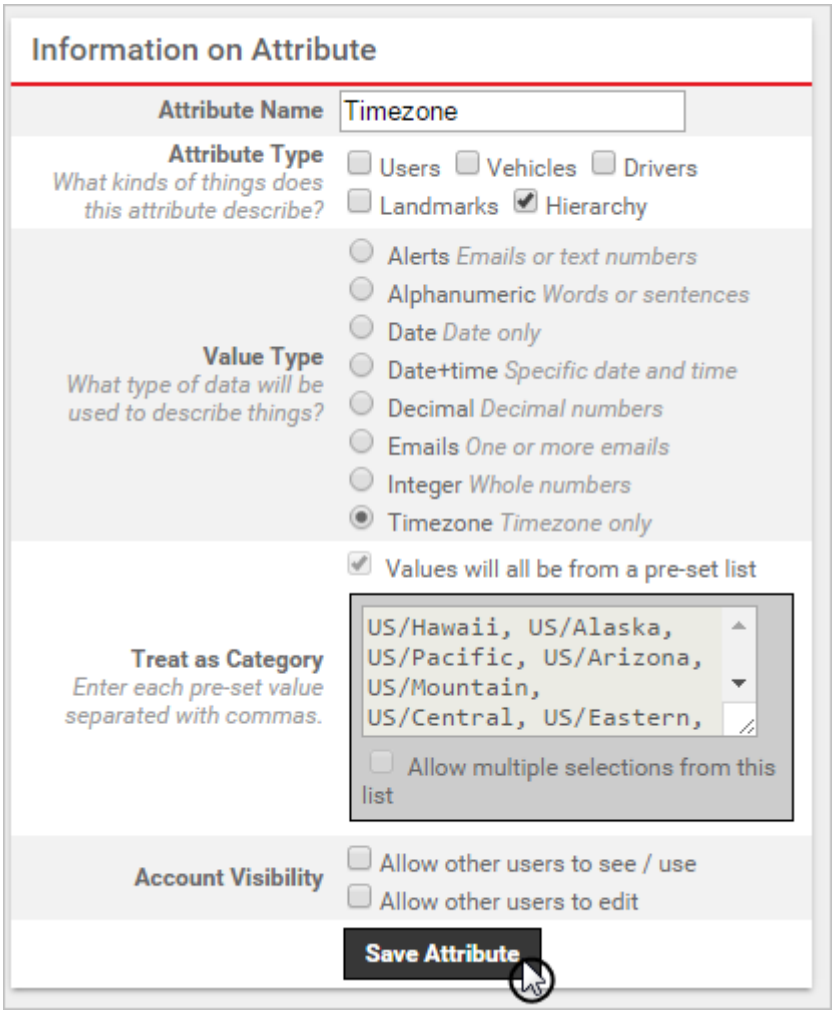
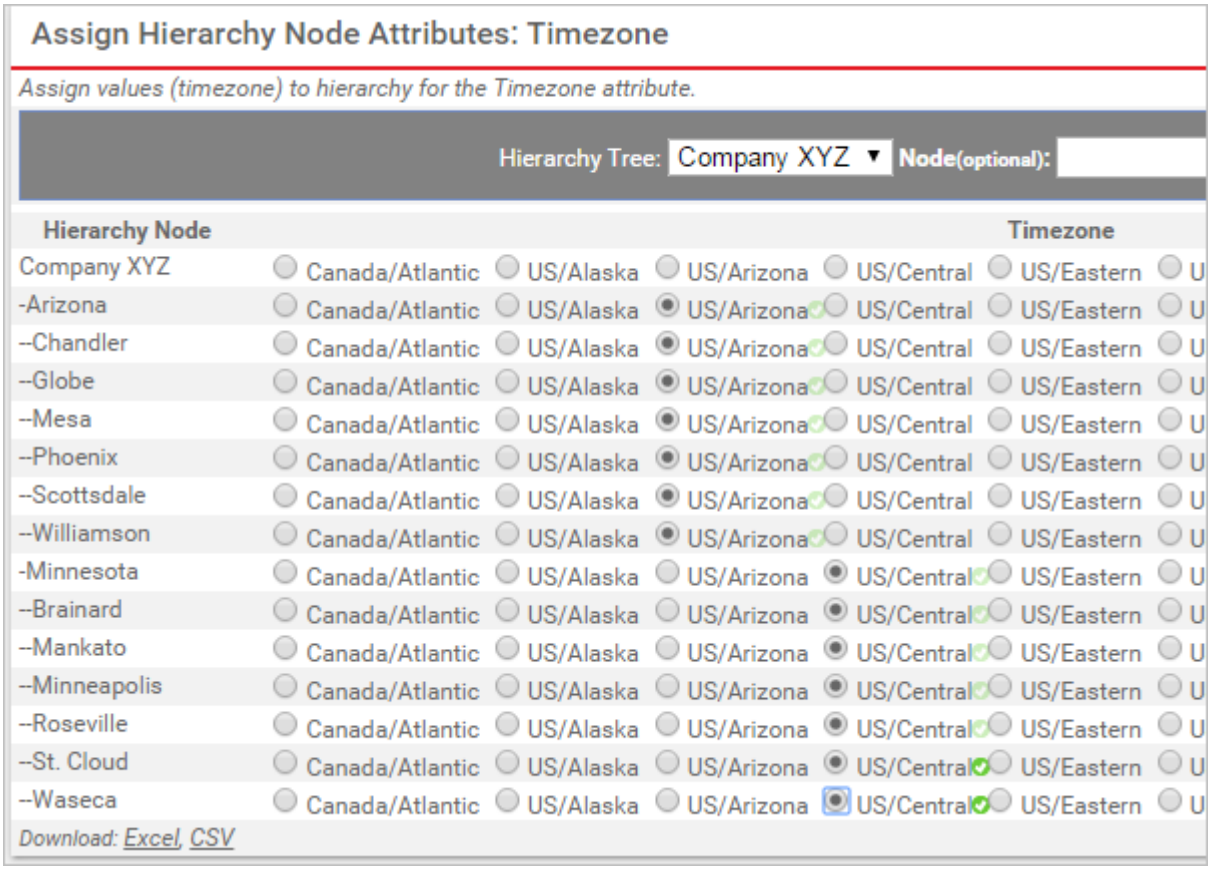


1. From the Attribute Definitions grid, click the green check mark icon(s) (e.g., Hierarchy) to assign values.

1. From the Assign Hierarchy Node Attributes grid, choose the Hierarchy Tree to which this attribute applies. In the Company XYZ example, we chose the “Company XYZ” hierarchy, which has levels for Arizona and Minnesota.
2. Click **Go**.
3. For each node in the selected hierarchy, choose the attribute value (e.g., Timezone) that you want to apply. Values are automatically saved when you either make a selection (for pre-defined lists) or click/tab outside of the field (for text entry).



In the Company XYZ example, we also need to set up an Email attribute so that we can designate the email addresses per hierarchy node for where we want to send scheduled reports. Let's create another one in the next set of steps.

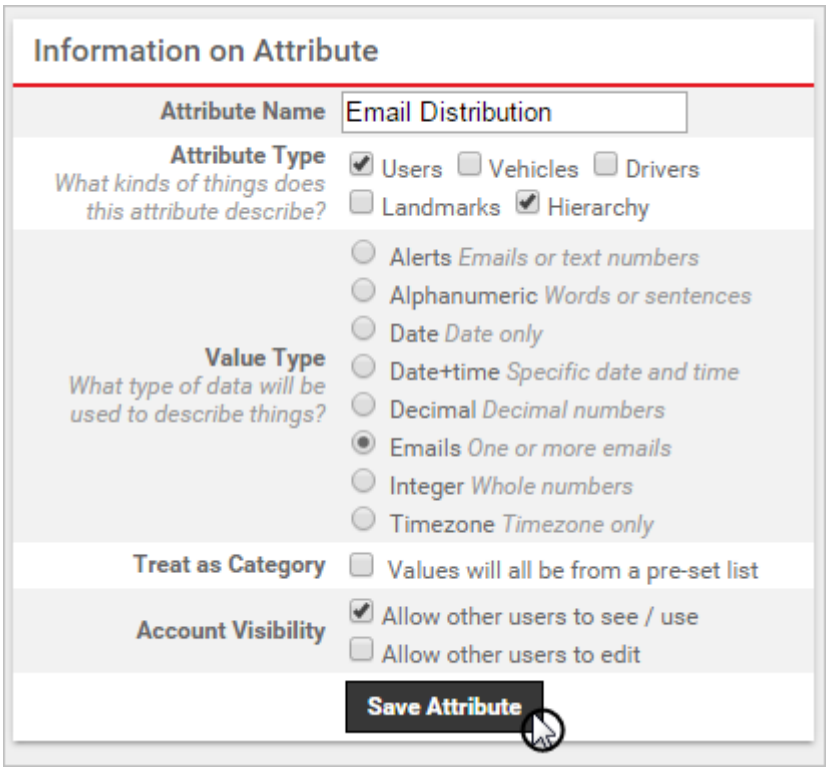
To create and assign an email hierarchy attribute:

1. From the the Manage Attributes page at the bottom of the Attribute Definitions grid, click **Attribute** next to Create New.

   The Add New Attribute screen window appears.

1. Set the different properties for the attribute:
   - **Attribute Name:** Enter the user-friendly identifier for the attribute (e.g., Email Distribution).
   - **Attribute Type:** Select the check box(es) for each type this attribute supports. In the Company XYZ example, we're setting up this attribute for hierarchy, but it might also apply to users.
   - **Value Type:** Choose the data type that is allowed for this attribute. In the Company XYZ example, we chose Emails.
   - **Treat as Category:** Although you can set up the email value type as a category if you had a few distribution lists from which to choose, it's most often used as free-form.
   - **Account Visibility:** Select the check box(es) if you want other portal users on your account to see and use this attribute and/or edit this attribute.

2. Click **Save Attribute**.



1. From the Attribute Definitions grid, click the green check mark icon(s) (e.g., Hierarchy) to assign values.

1. From the Assign Hierarchy Node Attributes grid, choose the Hierarchy Tree you want to use. In the Company XYZ example, we chose the “Company XYZ” hierarchy, which has levels for Arizona and Minnesota.
2. Click **Go**.
3. For each node in the selected hierarchy, choose the attribute value (e.g., email address) that you want to apply. You can specify one or more email addresses per entry (separated by commas). Values are automatically saved when you either make a selection (for pre-defined lists) or click/tab outside of the field (for text entry).

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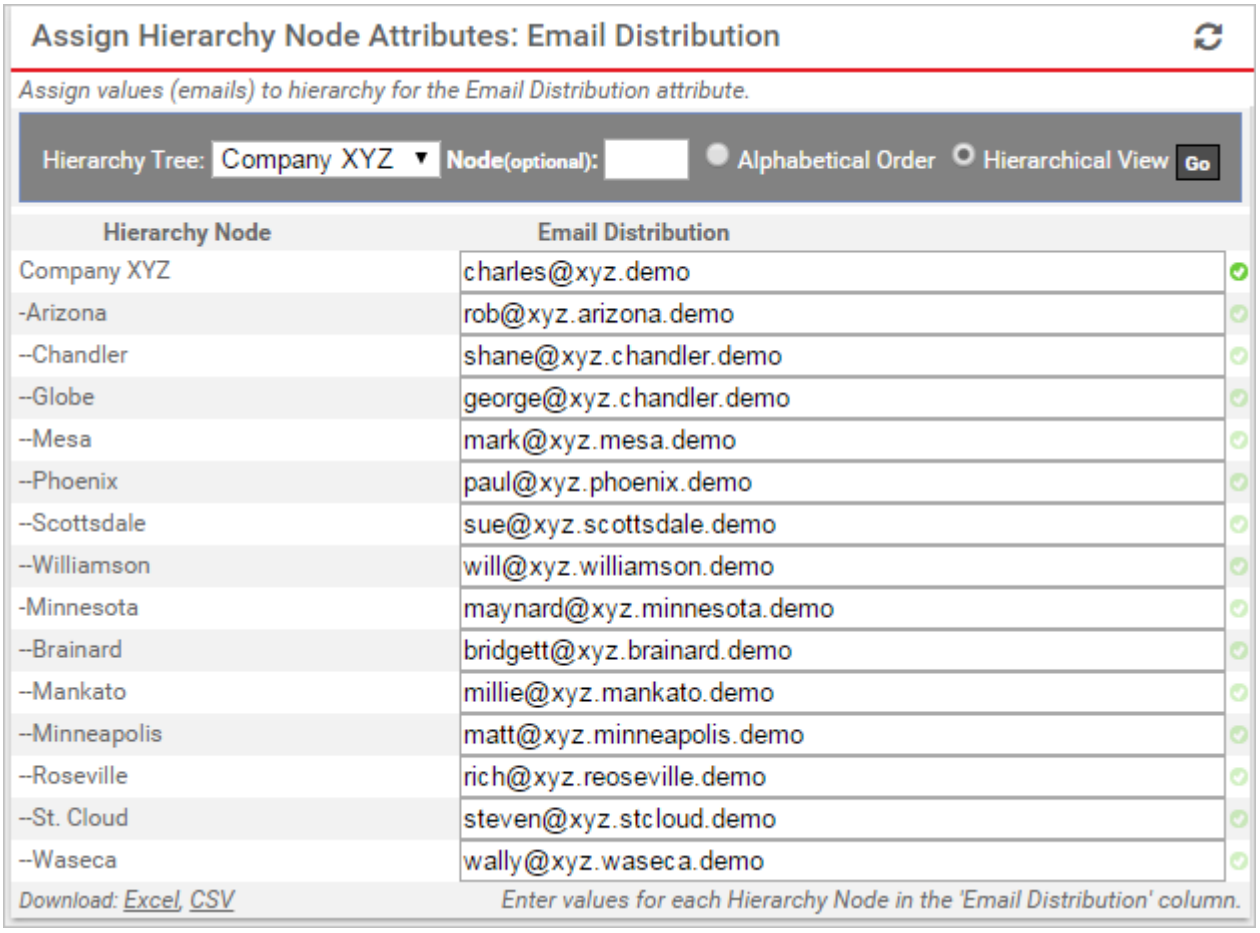
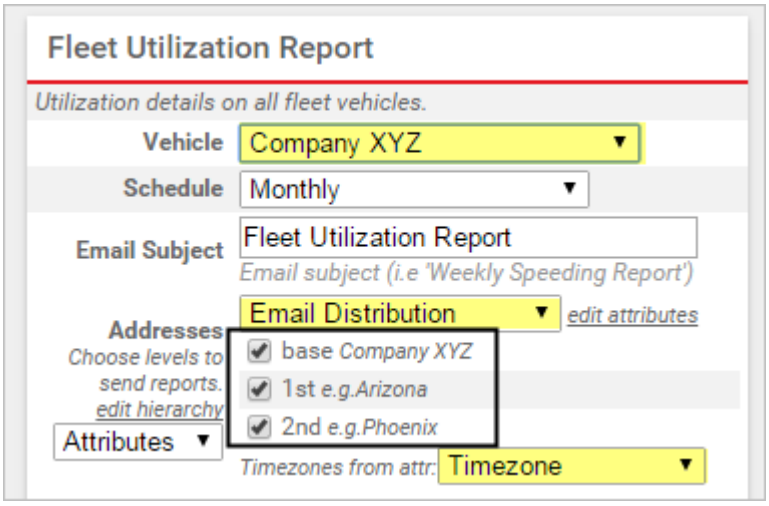
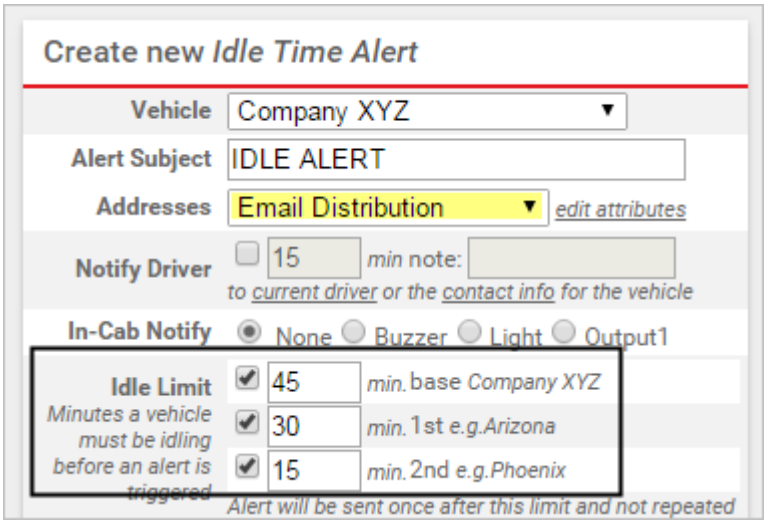


Now you can use this attribute on a scheduled report or alert whenever you filter the vehicle list using one of the nodes in your hierarchy. In the following example, when scheduling a fleet utilization report based on Company XYZ vehicles, the timezones in the report will be formatted according to what was specified when applying the attribute, and the report will be sent to the email addresses set up in the hierarchy.



Email hierarchy attributes can also be used when setting up alerts for automatic escalation:


Create new Idle Time Alert
Vehicle
Company XYZ
Alert Subject
IDLE ALERT
Addresses
Email Distribution
edit attributes
Notify Driver
15
min note:
to current driver or the contact info for the vehicle
In-Cab Notify
None
Buzzer
Light
Output1
Idle Limit
Minutes a vehicle must be idling before an alert is triggered
45
min. base Company XYZ
30
min. 1st e.g.Arizona
15
min. 2nd e.g.Phoenix
Alert will be sent once after this limit and not repeated