

# OBTAIN How-To: Named Tailoring

OBTAIN's Asset Spreadsheet has always been one of its most widely used features. Users are able to generate a report which lists information on every single Asset in their database, whether they are Devices, Racks, Patch Panels, Cables and so forth. However, our users needed a way to easily define which data they wanted to see in the spreadsheet at any given time. To answer this request, the Named Tailoring feature was added to the Asset Spreadsheet. The Named Tailoring feature allows individual users to create, modify and save specific tailoring formats for the Asset Spreadsheet. This allows users to switch between their tailoring settings with a single click so they can view different groups of Assets.

## **How to Use Named Tailoring:**

### **Create a Named Tailoring:**

- 1) From the main OBTAIN window click Spreadsheets > Assets, to open the Assets Spreadsheet.
- 2) At the bottom middle of the Asset Spreadsheet, click the Hidden Columns button.
- 3) The Asset Spreadsheet Tailoring window will open.
- 4) Input a name for the tailoring in the top right corner.
- 5) Click the Add button.

### **Choosing Columns to Hide:**

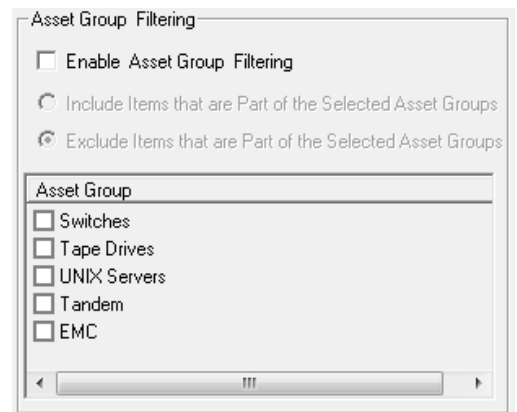
- 1) Click the top left drop-down list and select your Named Tailoring.
- 2) The left most box of the Asset Spreadsheet Tailoring window contains a list of all the displayable columns. By default, all columns will be set to be displayed. However, very rarely do users want/need to see every single column of information.
- 3) To hide a column, preventing it from showing in the Asset Spreadsheet, click the box to the left of the column name to check it off. Any column that is checked off will be hidden in the Asset Spreadsheet and won't be displayed.
- 4) After you're finished choosing which columns to hide, click the Save Changes to this Named Tailoring button.
- 5) When you close the Asset Spreadsheet Tailoring window, the Asset Spreadsheet will update itself based on which columns you have set to be hidden and those you don't.

### **Filtering the Asset Spreadsheet:**

There are five main ways to filter the Asset Spreadsheet in order to make it display only the information that you want it to.

#### **1) Asset Group Filtering:**

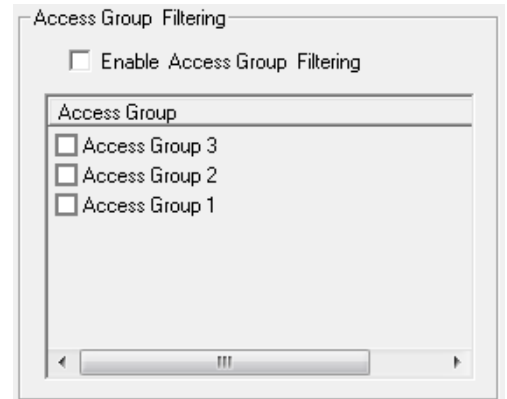
- a. If there are Asset Groups defined in your database then you are able to filter the Asset Spreadsheet to only show Assets that have been assigned to a specific group.
- b. Check off the Enable Asset Group Filtering box.
- c. Check off the Asset Groups that you want to be displayed.
- d. Save the changes to the tailoring, close the tailoring window and your spreadsheet will be updated.



(Figure 1)

## 2) Access Group Filtering:

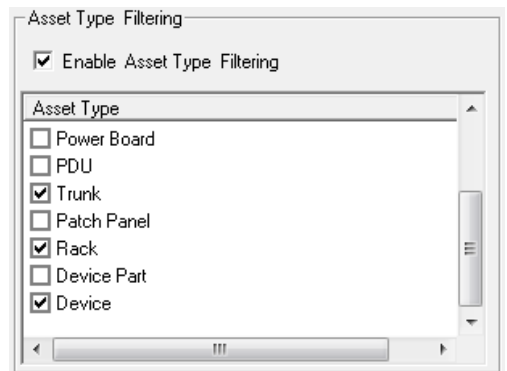
- a. If there are Access Groups defined in your database then you are able to filter the Asset Spreadsheet to only show Assets that have been assigned to a specific group.
- b. Check off the Enable Access Group Filtering box.
- c. Check off the Access Groups that you want to be displayed.
- d. Save the changes to the tailoring, close the tailoring window and your spreadsheet will be updated to only show Assets that are in the specific Access Groups.



(Figure 2)

## 3) Asset Type Filtering:

- a. As mentioned in the beginning of the document, the Asset Spreadsheet lists out every single Asset in the database. The Asset Type Filtering allows you to filter the spreadsheet so it only shows specific types of Assets. I.e. you can have the spreadsheet only show Devices and Blades or only Racks and Patch Panels.
- b. Check off the Enable Asset Type Filtering box.
- c. Check off the Assets Types that you want to have displayed in the Asset Spreadsheet
- d. Save the changes to the Named Tailoring, close the tailoring window and then the Asset Spreadsheet will update and only show the specific Asset Types that you selected.



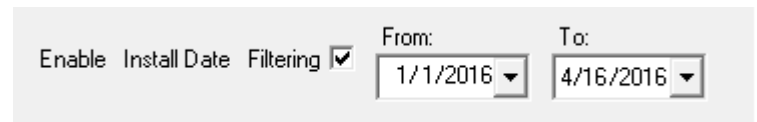
(Figure 3)

## 4) Scheduling Pool Filtering:

- a. If there are Customers and Scheduling Pools defined in your database then you are able to filter the Asset Spreadsheet to only shows Assets that have been scheduled into specific pools.
- b. Check off the Enable Scheduling Pool Filtering box.
- c. Check off the Scheduling Pools that you want to have displayed in the Asset Spreadsheet.
- d. Save the changes to the Named Tailoring, close the tailoring window and then the Asset Spreadsheet will update and only show Assets in the specific Scheduling Pools that you selected.

## 5) Install Date Filtering:

- a. Often times, users want to be able to output a list of Assets that were installed between two specific dates. The Install Date Filtering allows you to do exactly that.
- b. Check off the Enable Install Date Filtering box.
- c. Click on the "From" drop-down list and select the initial install date.
- d. Click on the "To" drop-down list and select the ending install date.
- e. Save the changes to the Named Tailoring, close the tailoring window and then the Asset Spreadsheet will update and only show Assets that were installed between the two dates that you specified.



(Figure 4)