

# Add an Inventory Audit



This guide outlines a simple process for inventory audits, covering setup, assignments, and customization. It helps streamline inventory management, ensure accurate records, and gives users confidence in handling audits.

## 1 Select "Assets".

The screenshot shows the ONE TO ONE PLUS dashboard interface. The left sidebar contains a navigation menu with the following items: Dashboard, Sites, Assets (highlighted with a red box), Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, Reports, and Settings. The main content area displays the 'Dashboard' page with a search bar at the top and a navigation bar with 'Tickets', 'Assets', 'Users', and 'Locations'. Below the navigation bar, there are six donut charts representing different data points: 'Open Tickets by Assigned Technician' (Ben Zuber: 122, Joey Cole: 93), 'Open Tickets by Queue' (High School: 5, DO Queue: 8), 'Open Tickets by Site' (QAHS: 59, QAES: 51, QADO: 67, Staff: 5, QAHS: 46), 'Open Tickets by Type' (Chromebook Missing Keys: 98, Chromebook Cracked Screen: 21, Chromebook Broken Screen: 3, Chromebook: 30, Random: 1, Powerschool Issue: 1, Password Reset: 2, New User Account: 1, Lost Device: 5, Laptop Missing Keys: 1), 'Tickets by Status' (New Ticket: 202), and 'Tickets by Closure Type' (Closed: 43).

## 2 Select "Inventory Audit".

The screenshot displays the ONE TO ONE PLUS dashboard interface. On the left, a vertical navigation menu lists various options: Dashboard, Sites, Assets, Manage, Assign, Turn In, Print Labels, Bulk Update, Bulk Assign, Quick Add, **Inventory Audit** (highlighted with a red box), Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, and Reports. The main dashboard area is titled 'Dashboard' and features a navigation bar with 'Tickets', 'Assets', 'Users', and 'Locations'. Below this, there are six data visualization widgets:

- Open Tickets by Assigned Technician:** A donut chart showing tickets assigned to Ben Zuber (122) and Joey Cole (93).
- Open Tickets by Queue:** A donut chart showing tickets in the DO Queue (8) and High School (5).
- Open Tickets by Site:** A donut chart showing tickets across sites: QAMS (46), QAHS (59), QAES (51), QADO (67), and Staff (5).
- Open Tickets by Type:** A donut chart showing ticket types: Chromebook Missing Keys (98), Chromebook Cracked Screen (21), Chromebook Broken Screen (3), Chromebook (30), Random (1), Powerschool Issue (1), Password Reset (2), New User Account (1), Lost Device (5), and Laptop Missing Keys (1).
- Tickets by Status:** A donut chart showing New Ticket (202).
- Tickets by Closure Type:** A donut chart showing Closed (43).

### 3 Select "Add New".

ONE TO ONE PLUS

Home > Audits

1to1QA 1to1 QA

## Inventory Audits

[+ Add New](#)

Filter System Status: Active x 50

Completed	Inventory Audit	Start	End	Total Sites	Total Assets	Reconciled	Unreconciled	Reconciliation Issues	Status	Sys
	2023 End Of Year	6/1/23	6/16/23	4	940	3	937	2	Active	Act
	Chromebooks	6/1/23	6/8/23	4	940	32	908	3	Active	Act
✓	TEST	6/1/23	6/30/23	1	0	0	0	0	Active	Act
	KAREN'S TEST	6/15/23	6/30/23	1	158	0	158	0	Active	Act
	My_Test	7/1/23	7/31/23	1	158	0	158	0	Active	Act
	MORE TEST	1/1/24	3/30/24	1	158	0	158	0	Active	Act
	Test	1/1/24	1/31/24	1	90	0	90	0	Active	Act
	Test	1/1/24	1/31/24	4	938	0	938	0	Active	Act
	High School Chromebooks	1/1/24	4/30/24	1	69	0	69	0	Active	Act
	Test during	2/1/24	3/31/24	4	938	0	938	0	Active	Act
	rwerwerwerwe	2/1/24	3/31/24	4	938	0	938	0	Active	Act
	fghdfghdfghdfghdfghdfgh	2/1/24	3/31/24	4	940	0	940	0	Active	Act
	Joey Cole	2/1/24	2/22/24	3	315	0	315	0	Active	Act
	Test	3/1/24	3/31/24	1	5	0	5	0	Active	Act
	Audit 2024	3/1/24	3/31/24	1	158	1	157	0	Active	Act
	QAHS AUDIT	3/1/24	3/31/24	1	158	1	157	0	Active	Act
	test	8/1/24	8/21/24	1	40	7	33	0	Active	Act

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Add an "Audit Title", "Start Date", "End Date" and "Sites".

**ONE TO ONE PLUS** Search

Home > Audits > Add

1to1QA 1to1 QA

### Add Inventory Audit

[← Inventory Audits](#)

**Details**

**Audit Title \***

**Start Date \***  x

**End Date \***  x

Assigned Users  v

**Sites \***  v **All**

Audit Status  Active x v

**Audit Settings**

Audit Settings

Assigned and Held by

Assigned to

Held by

**Do you want to reconcile during the audit?**

Reconcile During Audit

**Filters**

Asset Disposition  v

Location Types  v

Asset Types  v

Asset States  v

Asset Funding Sources  v

Asset Models  v

Asset Manufacturers  v

Asset Categories  v

Asset Classes  v

Asset Costs  v

**Dashboard**

**Sites** >

**Assets** v

Manage

Assign

Turn In

Print Labels

Bulk Update

Bulk Assign

Quick Add

**Inventory Audit**

**Students** >

**Staff** >

**Locations** >

**Help Desk** >

**Parts** >

**Invoices** >

**Imports** >

**Reports** >

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Select "Assigned to Users" to assist with the Inventory. (Only these users will be able to access the inventory).

The screenshot displays the 'ONE TO ONE PLUS' web application interface for adding a new audit. The left sidebar contains navigation options such as Dashboard, Sites, Assets, Manage, Assign, Turn In, Print Labels, Bulk Update, Bulk Assign, Quick Add, Inventory Audit, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, and Reports. The main content area is titled 'Home > Audits > Add' and features a search bar at the top right. The 'Details' section includes fields for 'Audit Title \*', 'Start Date \*', 'End Date \*', 'Assigned Users' (highlighted with a red box), 'Sites \*' (set to 'All'), and 'Audit Status' (set to 'Active'). The 'Audit Settings' section has three radio button options: 'Assigned and Held by' (selected), 'Assigned to', and 'Held by'. Below this is a section titled 'Do you want to reconcile during the audit?' with a 'Reconcile During Audit' checkbox. A 'Filters' section on the left lists various asset-related filters like Asset Disposition, Location Types, Asset Types, Asset States, Asset Funding Sources, Asset Models, Asset Manufacturers, Asset Categories, Asset Classes, and Asset Pools. A green 'Save' button is located at the bottom left of the form area.

## 6 Select "Filters" for Audit (if any).

The screenshot displays the 'ONE TO ONE PLUS' software interface for adding a new audit. The breadcrumb trail is 'Home > Audits > Add'. The interface is divided into several sections:

- Header:** Includes the 'ONE TO ONE PLUS' logo, a search bar, and user information '1to1QA'.
- Left Sidebar:** A navigation menu with options like Dashboard, Sites, Assets, Manage, Assign, Turn In, Print Labels, Bulk Update, Bulk Assign, Quick Add, Inventory Audit, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, and Reports.
- Main Content Area:**
  - Details:** Fields for Audit Title, Start Date, End Date, Assigned Users, Sites (with an 'All' button), and Audit Status (set to 'Active').
  - Audit Settings:** Radio buttons for 'Assigned and Held by' (selected), 'Assigned to', and 'Held by'.
  - Reconciliation:** A checkbox for 'Do you want to reconcile during the audit?' with the label 'Reconcile During Audit'.
  - Filters:** A section containing ten dropdown menus: Asset Disposition, Location Types, Asset Types, Asset States, Asset Funding Sources, Asset Models, Asset Manufacturers, Asset Categories, Asset Classes, and Asset Pools. This section is highlighted with a red border.
  - Buttons:** A green 'Save' button with a checkmark icon is located at the bottom left of the main content area.

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Select "Audit Settings" (will default to both Assigned and Held by).

The screenshot shows the 'Add Inventory Audit' page in the ONE TO ONE PLUS system. The page is divided into several sections:

- Header:** Includes the ONE TO ONE PLUS logo, a search bar, and user information (1to1QA).
- Left Sidebar:** Contains navigation options such as Dashboard, Sites, Assets, Manage, Assign, Turn In, Print Labels, Bulk Update, Bulk Assign, Quick Add, Inventory Audit, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, and Reports.
- Main Content Area:**
  - Details:** Fields for Audit Title, Start Date, End Date, Assigned Users, Sites (with an 'All' button), and Audit Status (set to Active).
  - Audit Settings:** A section highlighted with a red box containing three radio button options: 'Assigned and Held by' (selected), 'Assigned to', and 'Held by'.
  - Do you want to reconcile during the audit?:** A checkbox labeled 'Reconcile During Audit' which is currently unchecked.
  - Filters:** A list of dropdown menus for Asset Disposition, Location Types, Asset Types, Asset States, Asset Funding Sources, Asset Models, Asset Manufacturers, Asset Categories, and Asset Classes.
- Right Sidebar:** A button labeled '← Inventory Audits'.

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Select if you would like to reconcile assets during the audit process or leave unchecked if you would like to audit at the end of process.

The screenshot shows the 'ONE TO ONE PLUS' software interface for adding a new audit. The breadcrumb trail is 'Home > Audits > Add'. The left sidebar contains navigation options: Dashboard, Sites, Assets (with sub-options: Manage, Assign, Turn In, Print Labels, Bulk Update, Bulk Assign, Quick Add), Inventory Audit, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, and Reports. The main content area is divided into three sections: 'Details', 'Audit Settings', and 'Filters'.  
The 'Details' section includes:  
- Audit Title \* (text input)  
- Start Date \* (text input with 'x' icon)  
- End Date \* (text input with 'x' icon)  
- Assigned Users (dropdown menu)  
- Sites \* (dropdown menu with 'All' button)  
- Audit Status (dropdown menu with 'Active' selected and 'x' icon)  
The 'Audit Settings' section includes:  
- Audit Settings (radio buttons):  
 - Assigned and Held by (selected)  
 - Assigned to  
 - Held by  
- Do you want to reconcile during the audit? (checkbox)  
 - Reconcile During Audit (checkbox, highlighted with a red box)  
The 'Filters' section includes dropdown menus for:  
- Asset Disposition  
- Location Types  
- Asset Types  
- Asset States  
- Asset Funding Sources  
- Asset Models  
- Asset Manufacturers  
- Asset Categories  
- Asset Classes  
- Asset Pools  
At the bottom left of the form is a green 'Save' button with a checkmark icon.

# 9 Select "Save".

The screenshot displays the 'ONE TO ONE PLUS' software interface. The top navigation bar includes a search field and user information. The left sidebar contains a menu with options like Dashboard, Sites, Assets, Manage, Assign, Turn In, Print Labels, Bulk Update, Bulk Assign, Quick Add, Inventory Audit, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, and Reports. The main content area is titled 'Home > Audits > Add'. It features a 'Details' section with fields for Audit Title (QAHS), Start Date (2024-08-01), End Date (2024-08-17), Assigned Users (Ben Zuber), Sites (QAHS), and Audit Status (Active). An 'Add Settings' section has radio buttons for 'Assigned and Held by' (selected), 'Assigned to', and 'Held by'. A 'Do you want to reconcile during the audit?' section has a checked checkbox for 'Reconcile During Audit'. A 'Filters' section lists various asset-related categories with dropdown menus. At the bottom left, a green 'Save' button with a checkmark is highlighted with a red box. The bottom right corner shows a 'Changes detected...' notification.

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Select the audit that was created on manage page to start audit process.

The screenshot shows the 'Inventory Audits' page in the ONE TO ONE PLUS system. The page includes a search bar at the top, a sidebar with navigation options, and a table of audit records. The 'QAHS' audit is highlighted with a red box.

Completed	Inventory Audit	Start	End	Total Sites	Total Assets	Reconciled	Unreconciled	Reconciliation Issues	Status	System	
	Chromebooks	6/1/23	6/30/23	1	938	938	0	0	0	Active	Act
✓	TEST	6/1/23	6/30/23	1	0	0	0	0	0	Active	Act
	KAREN'S TEST	6/15/23	6/30/23	1	158	0	158	0	0	Active	Act
	My_Test	7/1/23	7/31/23	1	158	0	158	0	0	Active	Act
	MORE TEST	1/1/24	3/30/24	1	158	0	158	0	0	Active	Act
	Test	1/1/24	1/31/24	1	90	0	90	0	0	Active	Act
	Test	1/1/24	1/31/24	4	938	0	938	0	0	Active	Act
	High School Chromebooks	1/1/24	4/30/24	1	69	0	69	0	0	Active	Act
	Test during	2/1/24	3/31/24	4	938	0	938	0	0	Active	Act
	rwerwerwerwe	2/1/24	3/31/24	4	938	0	938	0	0	Active	Act
	fghdfghdfghdfghdfghdfgh	2/1/24	3/31/24	4	940	0	940	0	0	Active	Act
	Joey Cole	2/1/24	2/22/24	3	315	0	315	0	0	Active	Act
	Test	3/1/24	3/31/24	1	5	0	5	0	0	Active	Act
	Audit 2024	3/1/24	3/31/24	1	158	1	157	0	0	Active	Act
	QAHS AUDIT	3/1/24	3/31/24	1	158	1	157	0	0	Active	Act
	test	8/1/24	8/31/24	1	40	7	33	0	0	Active	Act
	QAHS	8/1/24	8/17/24	1	158	0	158	0	0	Active	Act