

Schedule Reports



This guide shows how to easily schedule reports for automatic email delivery, saving time and boosting productivity. It streamlines access to key data in CSV format for easy analysis and sharing.

1 Select "Reports".

The screenshot displays the ONE TO ONE PLUS dashboard interface. The left sidebar contains a navigation menu with the following items: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, Reports (highlighted with a red box), and Settings. The main dashboard area is titled "Dashboard" and features a search bar at the top right. Below the search bar, there are tabs for Tickets, Assets, Users, and Locations. The dashboard contains several data visualization widgets:

- Open Tickets by Assigned Technician:** A donut chart showing tickets assigned to Kimberly Morgan (17), Karen Zuber (5), and Bun Lamaster (1).
- Open Tickets by Queue:** A donut chart showing tickets in the HD Queue (2).
- Open Tickets by Site:** A donut chart showing tickets from QMS (16), QMS (1), QMS (3), and User Departments/Management (TDO) (3).
- Open Tickets by Type:** A donut chart showing tickets for Chromebook Cracked Screen (22), iPad not working (1), and Chromebook missing keys (2).
- Tickets by Status:** A donut chart showing New Ticket (19) and Waiting on Parts (6).
- Tickets by Closure Type:** A donut chart showing Closed (4).
- Outstanding Tickets by Time:** A bar chart showing the number of outstanding tickets over time intervals: 0-1 day (13), 1-2 days (7), 3-5 days (2), 5-7 days (1), 7-30 days (1), and 30+ days (0).

The bottom right corner of the dashboard area displays "No data to display." with a refresh icon.

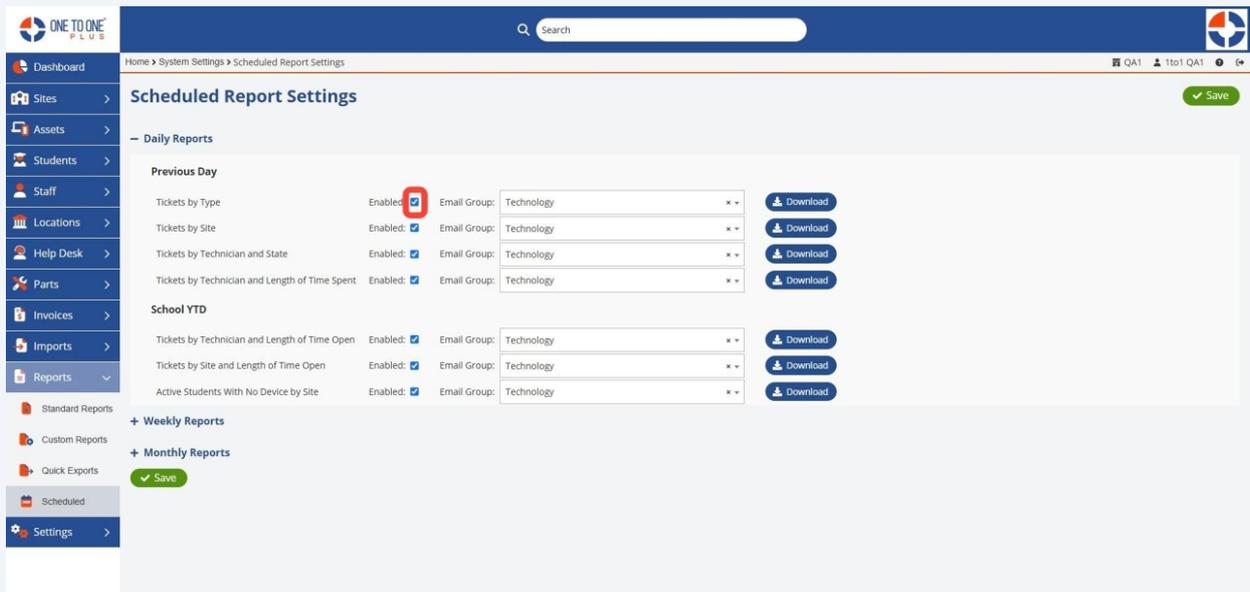
2 Select "Scheduled".

The screenshot shows the ONE TO ONE PLUS dashboard. The left sidebar contains a menu with the following items: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, Reports, Standard Reports, Custom Reports, Quick Exports, **Scheduled** (highlighted with a red box), and Settings. The main dashboard area displays several reports under the 'Tickets' tab: 'Open Tickets by Assigned Technician' (donut chart), 'Open Tickets by Queue' (donut chart), 'Open Tickets by Site' (donut chart), 'Open Tickets by Type' (donut chart), 'Tickets by Status' (donut chart), 'Tickets by Closure Type' (donut chart), and 'Outstanding Tickets by Time' (bar chart). A 'No data to display' message is visible in the bottom right corner of the dashboard area.

3 Select an area to schedule reports.

The screenshot shows the ONE TO ONE PLUS 'Scheduled Report Settings' page. The breadcrumb trail is 'Home > System Settings > Scheduled Report Settings'. The left sidebar is the same as in the previous screenshot, with 'Scheduled' highlighted. The main content area shows three report categories: '+ Daily Reports' (highlighted with a red box), '+ Weekly Reports', and '+ Monthly Reports'. A green 'Save' button is located at the bottom right of the main content area.

4 Enable the report(s) that you wish to schedule.



Home > System Settings > Scheduled Report Settings

Scheduled Report Settings

— Daily Reports

Previous Day

Tickets by Type	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Tickets by Site	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Tickets by Technician and State	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Tickets by Technician and Length of Time Spent	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download

School YTD

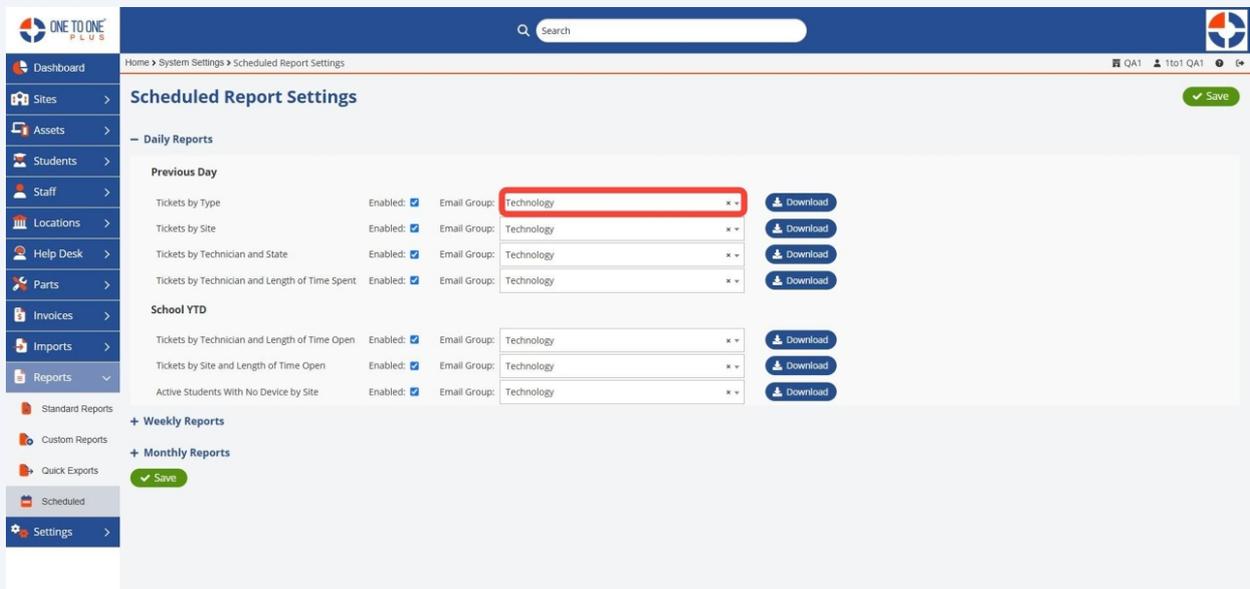
Tickets by Technician and Length of Time Open	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Tickets by Site and Length of Time Open	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Active Students With No Device by Site	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download

+ Weekly Reports

+ Monthly Reports

Save

5 Select an "Email Group" where the reports will be delivered.



Home > System Settings > Scheduled Report Settings

Scheduled Report Settings

— Daily Reports

Previous Day

Tickets by Type	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Tickets by Site	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Tickets by Technician and State	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Tickets by Technician and Length of Time Spent	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download

School YTD

Tickets by Technician and Length of Time Open	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Tickets by Site and Length of Time Open	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Active Students With No Device by Site	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download

+ Weekly Reports

+ Monthly Reports

Save

6 Select "Download" to download the report as a CSV file.

ONE TO ONE PLUS

Home > System Settings > Scheduled Report Settings

Scheduled Report Settings

Save

— Daily Reports

Previous Day

Tickets by Type	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Tickets by Site	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Tickets by Technician and State	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Tickets by Technician and Length of Time Spent	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download

School YTD

Tickets by Technician and Length of Time Open	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Tickets by Site and Length of Time Open	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Active Students With No Device by Site	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download

+ Weekly Reports

+ Monthly Reports

Save

7 Select "Save".

ONE TO ONE PLUS

Home > System Settings > Scheduled Report Settings

Scheduled Report Settings

Save

— Daily Reports

Previous Day

Tickets by Type	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Tickets by Site	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Tickets by Technician and State	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Tickets by Technician and Length of Time Spent	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download

School YTD

Tickets by Technician and Length of Time Open	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Tickets by Site and Length of Time Open	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download
Active Students With No Device by Site	Enabled: <input checked="" type="checkbox"/>	Email Group: Technology	Download

+ Weekly Reports

+ Monthly Reports

Save