

Setup Rules



This guide offers a step-by-step process to set up rules, automate tasks, and customize workflows, helping improve productivity and ensure timely notifications.

1 Select "Settings".

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, and Settings. The 'Settings' item is highlighted with a red box. The main dashboard area shows a search bar at the top right, a breadcrumb trail 'Home > Dashboard', and a notification 'Tab selections will be stored for future visits.' Below this, there are tabs for Tickets, Assets, Users, and Locations. The dashboard features six data visualization widgets: 'Assets by Type' (donut chart showing Laptop: 8,700 and Chromebook, 4 Pad: 1), 'Assets by Site' (bar chart showing QAHS: 8,705, QAES, and QADO), 'Assets Not Turned In by Site' (line chart showing QAHS: 8,701, QAES: 2, and QADO: 145), 'Assets by Status' (donut chart showing Active: 8,872), 'Assets Assigned' (donut chart showing Unassigned: 99.7% and Assigned: 0.3%), and 'Assets by Funding Source' (bar chart showing E-Rate).

2 Select "System".

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, Settings, System (highlighted with a red box), Assets, Users, Sites, and Parts. The main content area displays a dashboard with several charts and widgets. The 'Assets' widget is selected, showing various asset-related metrics. The 'System' menu item is highlighted in the left sidebar.

Dashboard

Home > Dashboard

QA1 1to1 QA1

Tab selections will be stored for future visits.

Tickets Assets Users Locations

Assets by Type

Laptop	8,700
Chromebook	4
Pad	1

Assets by Site

QAHS	8,708
QAES	
QAEO	

Assets Not Turned In by Site

QAHS	8,701
QAES	2
QAEO	145

Assets by Status

Active	8,872
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Assets Assigned

Unassigned	99.7%
Assigned	0.3%

Assets by Funding Source

E-Rate	
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3 Select "Rules".

The screenshot shows the ONE TO ONE PLUS System Properties page. The left sidebar contains a menu with the following items: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, Reports, Settings, System (highlighted with a red box), Assets, Users, Sites, and Parts. The main content area displays the System Properties page with various configuration options. The 'Rules' menu item is highlighted in the left sidebar.

ONE TO ONE PLUS

Home > System Properties

QA1 1to1 QA1

System Properties

System Settings
General, Printing, etc.

User Logins
Username, Password, etc.

User Roles
Administrator, Technician, etc.

User Groups
Administrators, Technicians, etc.

Email Groups
Student Changes, Asset Changes, etc.

School Years
Start Date, End Date, etc.

SMTP Configurations
Gmail, Office 365, etc.

Rules
System events and rules for tasks, email, etc.

Custom Emails
Customize your emails

Custom Fields
Create and Manage Custom Fields

4 Select "Add New" to add a new rule.

The screenshot shows the 'Rules' page in the ONE TO ONE PLUS system. The page title is 'Rule(s) Showing all 2 records'. There are buttons for 'Columns', 'My Views', and 'Add New' (highlighted with a red box). Below the buttons is a search bar and a 'Refresh' button. The 'View Applied' is set to 'Standard'. The table below shows two rules:

Rule Name	Description	Priority	Actions
Select	Select	Select	Clear
Ticket Type Default Technician Rule	This rule sets the technician on a ticket based on the default technician field on the ticket type.	99	Edit Delete
Site Default Technician Rule	This rule sets the technician on a ticket based on the default technician field for each individual site.	100	Edit Delete

5 Select "Edit" to edit an existing rule.

The screenshot shows the 'Rules' page in the ONE TO ONE PLUS system. The 'Add New' button is now greyed out, and the 'Edit' button for the 'Ticket Type Default Technician Rule' is highlighted with a red circle. The table below shows the same two rules:

Rule Name	Description	Priority	Actions
Select	Select	Select	Clear
Ticket Type Default Technician Rule	This rule sets the technician on a ticket based on the default technician field on the ticket type.	99	Edit Delete
Site Default Technician Rule	This rule sets the technician on a ticket based on the default technician field for each individual site.	100	Edit Delete

6 Enter a name for the rule.

ONE TO ONE PLUS

Home > System Properties > Rules > Edit

Edit Rule

Save

Rule Name * Ticket Type Default Technician Rule

Description This rule sets the technician on a ticket based on the default technician field on the ticket type.

Event * Ticket is Created

Priority * 99

— Conditions

OR

AND

CONDITION FIELD

— Actions

ACTION FIELD

Action * Assign Ticket Type Technician

Delete

7 Add a description of the rule.

ONE TO ONE PLUS

Home > System Properties > Rules > Edit

Edit Rule

Save

Rule Name * Ticket Type Default Technician Rule

Description This rule sets the technician on a ticket based on the default technician field on the ticket type.

Event * Ticket is Created

Priority * 99

— Conditions

OR

AND

CONDITION FIELD

— Actions

ACTION FIELD

Action * Assign Ticket Type Technician

Delete

8 Select an event from the list that will trigger the rule.

The screenshot shows the 'Edit Rule' page in the ONE TO ONE PLUS system. The page title is 'Edit Rule'. The breadcrumb navigation is 'Home > System Properties > Rules > Edit'. The left sidebar contains a navigation menu with items: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, Reports, Settings, System, Assets, Users, Sites, and Parts. The main content area is divided into sections: Rule Name, Description, Event, Priority, Conditions, and Actions. The 'Rule Name' is 'Ticket Type Default Technician Rule'. The 'Description' is 'This rule sets the technician on a ticket based on the default technician field on the ticket type.' The 'Event' dropdown is highlighted with a red box and shows 'Ticket is Created' selected. The 'Priority' is '99'. The 'Conditions' section is currently empty. The 'Actions' section has one action: 'Assign Ticket Type Technician'.

9 Add a priority for the rule as they will process in priority order (#1 being the highest priority).

The screenshot shows the 'Edit Rule' page in the ONE TO ONE PLUS system, similar to the previous one. The 'Event' dropdown is still 'Ticket is Created'. The 'Priority' input field is now highlighted with a red box and contains the value '99'. The 'Conditions' and 'Actions' sections remain the same as in the previous screenshot.

10 Drag a "Condition Field" into the conditions area.

The screenshot shows the 'ONE TO ONE PLUS' interface for editing rules. The breadcrumb trail is 'Home > System Properties > Rules > Edit'. The left sidebar contains navigation options: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, Reports, Settings, System, Assets, Users, Sites, and Parts. The main content area is divided into sections: 'Event *' (Ticket Is Created), 'Priority *' (99), 'Conditions', 'Actions', and 'Notifications'. In the 'Conditions' section, a list of fields on the left includes 'OR', 'AND', and 'CONDITION FIELD', with 'CONDITION FIELD' highlighted by a red box. The configuration area on the right shows 'Field *' set to 'Site', 'Operator *' set to 'One Of', and 'Site(s) *' set to 'QAHS'. The 'Actions' section shows 'Action *' set to 'Assign Ticket Type Technician'. A 'Delete' button is visible next to the configuration area. The bottom right corner indicates 'Changes detected...'.

11 Select a field from the list.

This screenshot is identical to the previous one, but the 'Field *' dropdown in the configuration area is highlighted with a red box, indicating that a field has been selected from the list. The 'Field *' dropdown now shows 'Site' as the selected option. The rest of the interface remains the same.

12 Choose whether the field is "one of" or "not one of" from the list.

The screenshot shows the 'ONE TO ONE PLUS' interface for editing a rule. The breadcrumb trail is 'Home > System Properties > Rules > Edit'. The rule configuration is as follows:

- Event ***: Ticket is Created
- Priority ***: 99
- Conditions**:
 - Logic: OR
 - Field: Site
 - Operator ***: One Of (highlighted with a red box)
 - Site(s): X QAHS
- Actions**:
 - Action: Assign Ticket Type Technician

A 'Delete' button is visible next to the condition and action fields. The bottom right corner shows 'Changes detected...'.

13 Select the options that you wish to include in the condition. You can select multiple options.

The screenshot shows the same 'ONE TO ONE PLUS' interface for editing a rule. The configuration is identical to the previous screenshot, but the 'Site(s)' dropdown is highlighted with a red box.

- Event ***: Ticket is Created
- Priority ***: 99
- Conditions**:
 - Logic: OR
 - Field: Site
 - Operator: One Of
 - Site(s) ***: X QAHS (highlighted with a red box)
- Actions**:
 - Action: Assign Ticket Type Technician

A 'Delete' button is visible next to the condition and action fields. The bottom right corner shows 'Changes detected...'.

14 You can add multiple conditions.

The screenshot shows the 'ONE TO ONE PLUS' interface for editing a rule. The breadcrumb trail is 'Home > System Properties > Rules > Edit'. The 'Event' is 'Ticket is Created' and the 'Priority' is '99'. The 'Conditions' section is highlighted with a red box and contains a single condition with the following settings: 'Field' is 'Site', 'Operator' is 'One Of', and 'Site(s)' is 'QAHS'. A 'Delete' button is located to the right of the condition. The 'Actions' section contains one action: 'Assign Ticket Type Technician'. The 'Notifications' section is currently empty. A 'Changes detected...' message is visible at the bottom right.

15 You can select whether you want multiple conditions to be met an "and" conditions as well as "or" conditions.

The screenshot shows the 'ONE TO ONE PLUS' interface for editing a rule. The breadcrumb trail is 'Home > System Properties > Rules > Edit'. The 'Event' is 'Ticket is Created' and the 'Priority' is '99'. The 'Conditions' section is highlighted with a red box and contains two options: 'OR' and 'AND'. The 'Field' dropdown is set to 'Site', the 'Operator' dropdown is set to 'One Of', and the 'Site(s)' dropdown is set to 'QAHS'. A 'Delete' button is located to the right of the condition. The 'Actions' section contains one action: 'Assign Ticket Type Technician'. The 'Notifications' section is currently empty. A 'Changes detected...' message is visible at the bottom right.

16 Drag the "Action Field" into the action area.

The screenshot shows the ONE TO ONE PLUS interface for editing a rule. The breadcrumb trail is "Home > System Properties > Rules > Edit". The rule configuration is as follows:

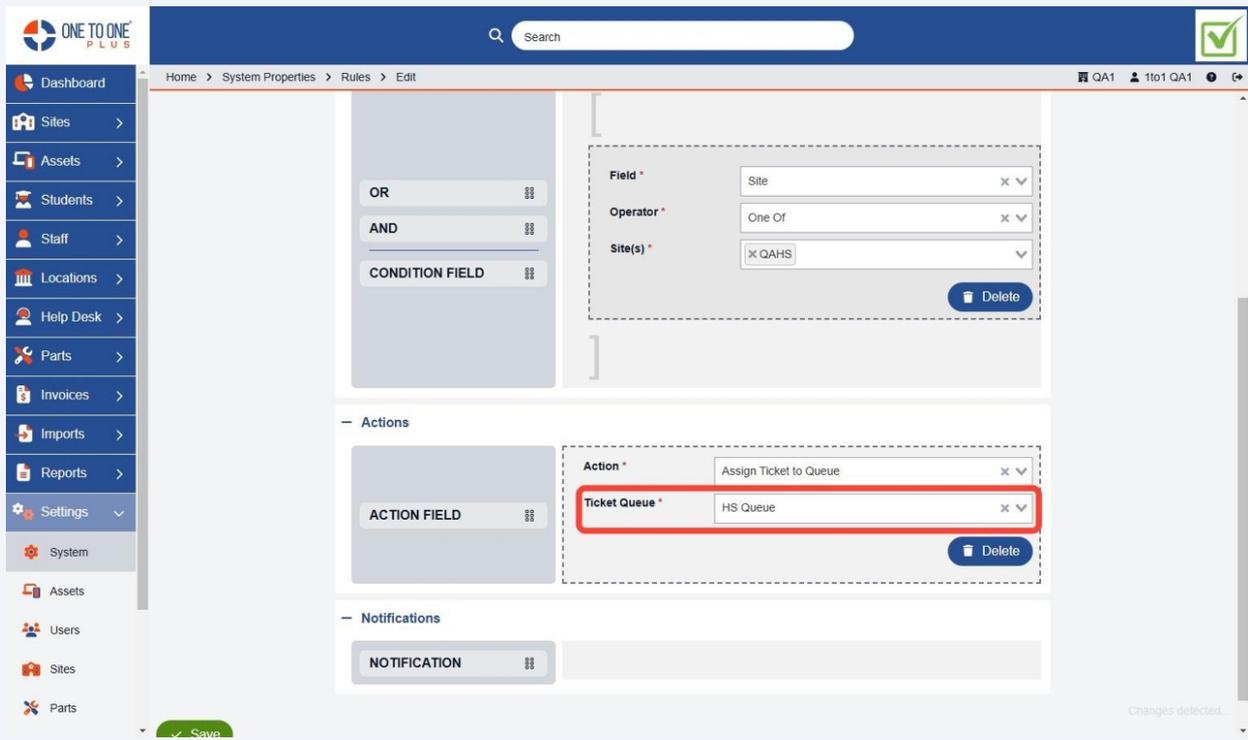
- Event ***: Ticket is Created
- Priority ***: 99
- Conditions**: A dashed box contains a configuration for "Field *" (Site), "Operator *" (One Of), and "Site(s) *" (QAHS). A "Delete" button is present.
- Actions**: A dashed box contains a configuration for "Action *" (Assign Ticket Type Technician) and a "Delete" button. A red box highlights the "ACTION FIELD" button in the left-hand menu of this section.
- Notifications**: A section header at the bottom.

The left sidebar contains a navigation menu with items: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, Reports, Settings, System, Assets, Users, Sites, and Parts.

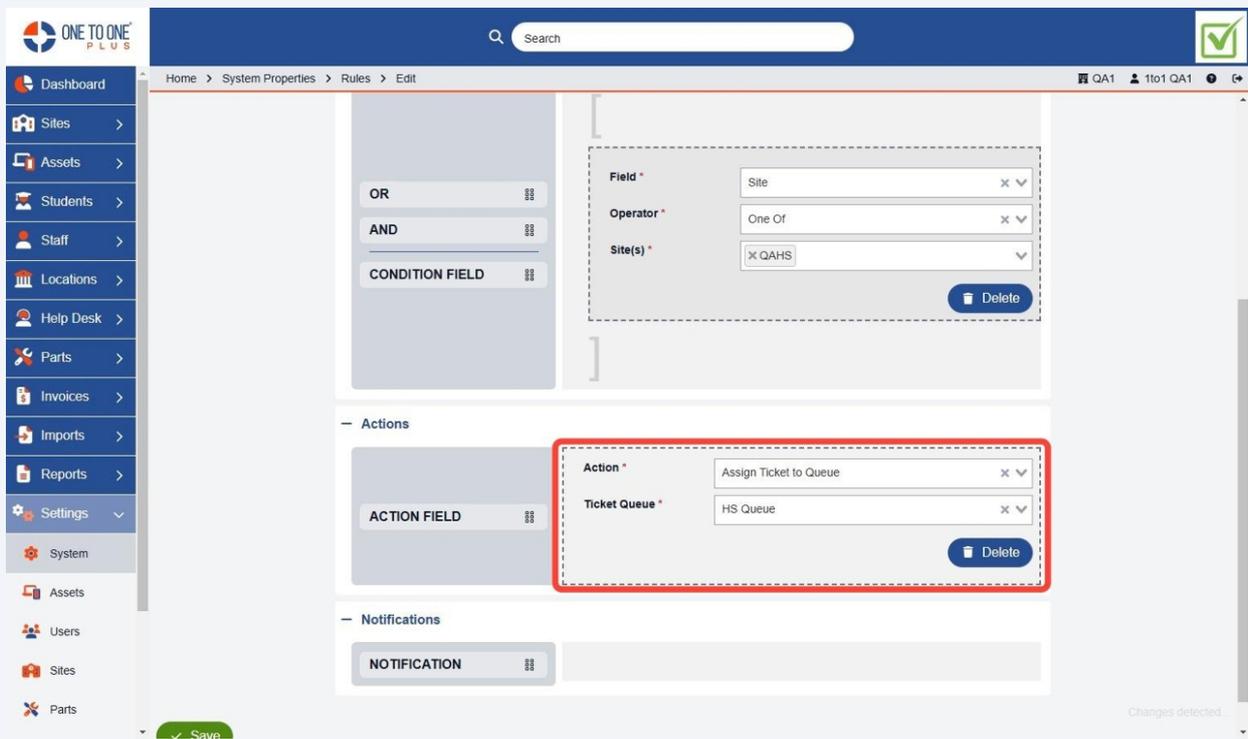
17 Select an "Action" from the list.

This screenshot is identical to the one above, but the red box now highlights the "Action *" dropdown menu in the "Actions" section, which is currently set to "Assign Ticket Type Technician".

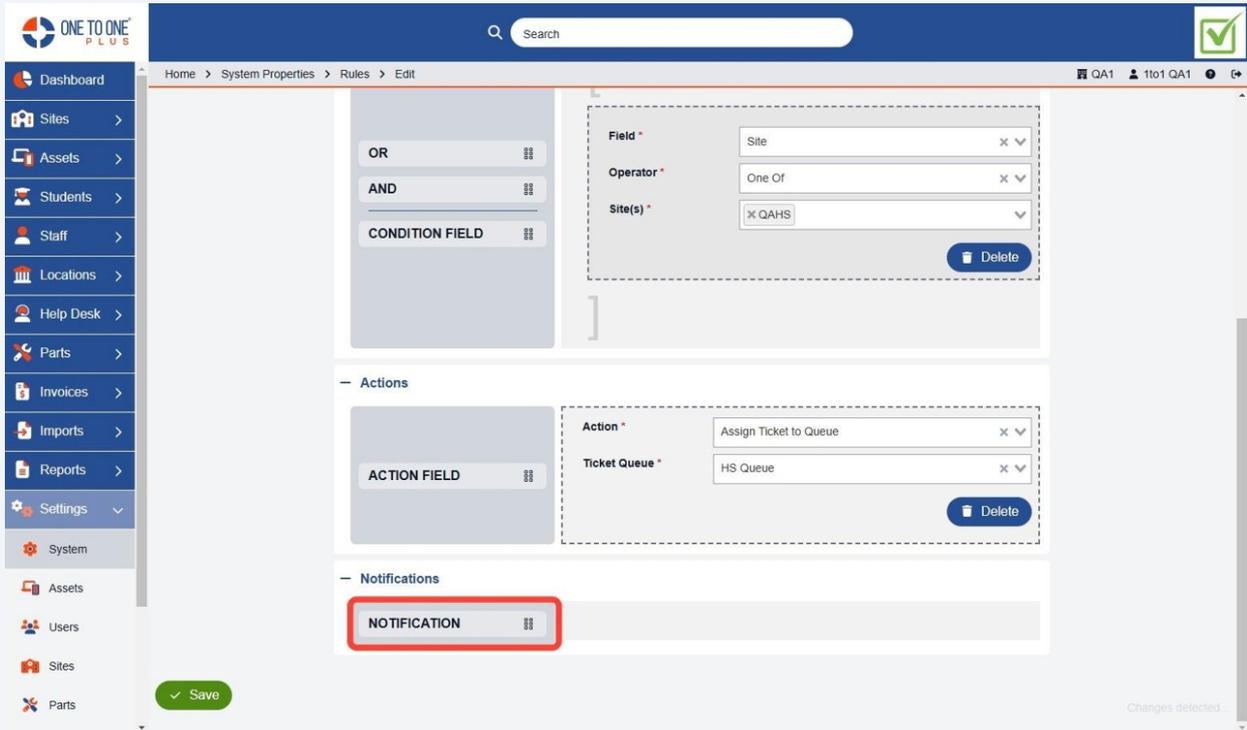
18 Select the options that meet the desired action from the list.



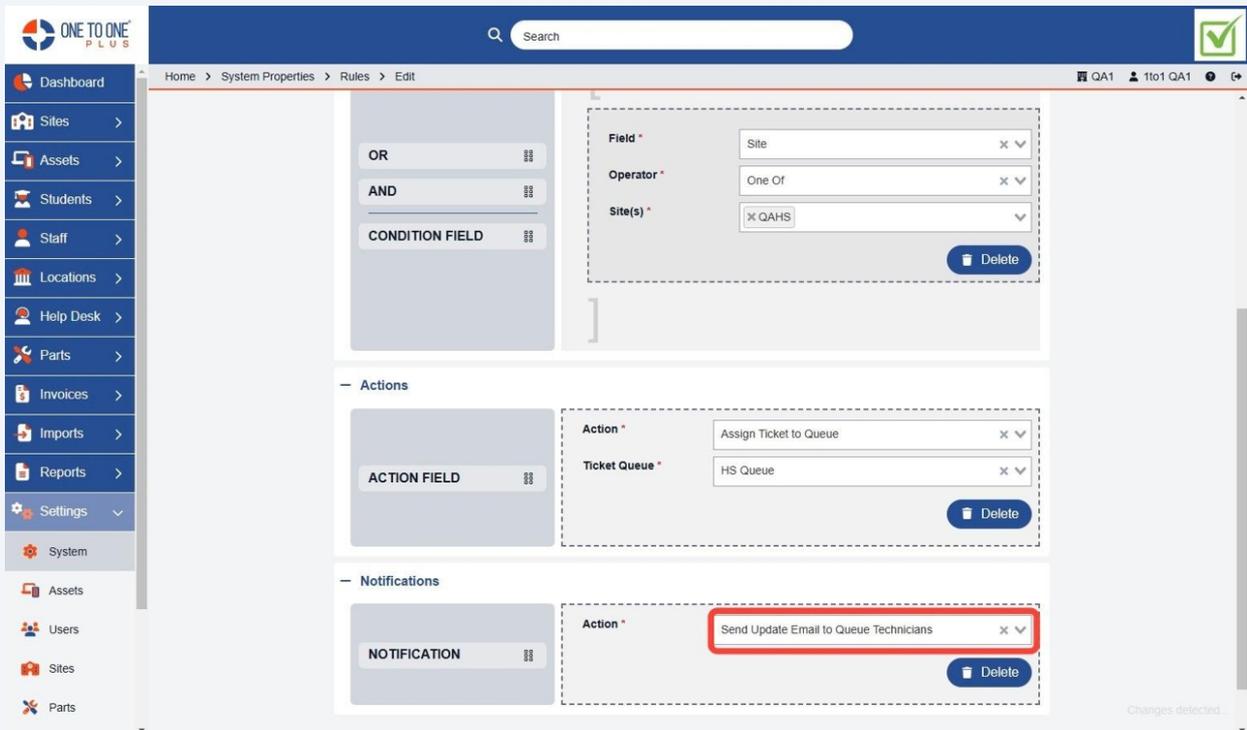
19 You can add multiple actions to a rule.



20 Drag a "Notification" into the notifications area.



21 Select the type of notification and the users to receive the notification from the list.



22 Select "Save".

The screenshot displays the 'ONE TO ONE PLUS' software interface for editing a rule. The breadcrumb trail is 'Home > System Properties > Rules > Edit'. The top navigation bar includes a search field and a user profile icon for 'QA1'. The left sidebar contains a menu with items: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, Reports, Settings, System, Assets, Users, Sites, and Parts. The main content area is divided into three sections:

- CONDITION FIELD:** A dropdown menu with options 'OR', 'AND', and 'CONDITION FIELD'. To the right, there are fields for 'Operator' (set to 'One Of') and 'Site(s)' (set to 'QAHS'), with a 'Delete' button.
- Actions:** A dropdown menu with options 'Assign Ticket to Queue' and 'Ticket Queue'. To the right, there are fields for 'Action' (set to 'Assign Ticket to Queue') and 'Ticket Queue' (set to 'HS Queue'), with a 'Delete' button.
- Notifications:** A dropdown menu with options 'Send Update Email to Queue Technicians'. To the right, there is a field for 'Action' (set to 'Send Update Email to Queue Technicians') and a 'Delete' button.

A green 'Save' button is highlighted in the bottom left corner. The bottom right corner of the interface shows the text 'Changes detected...'.