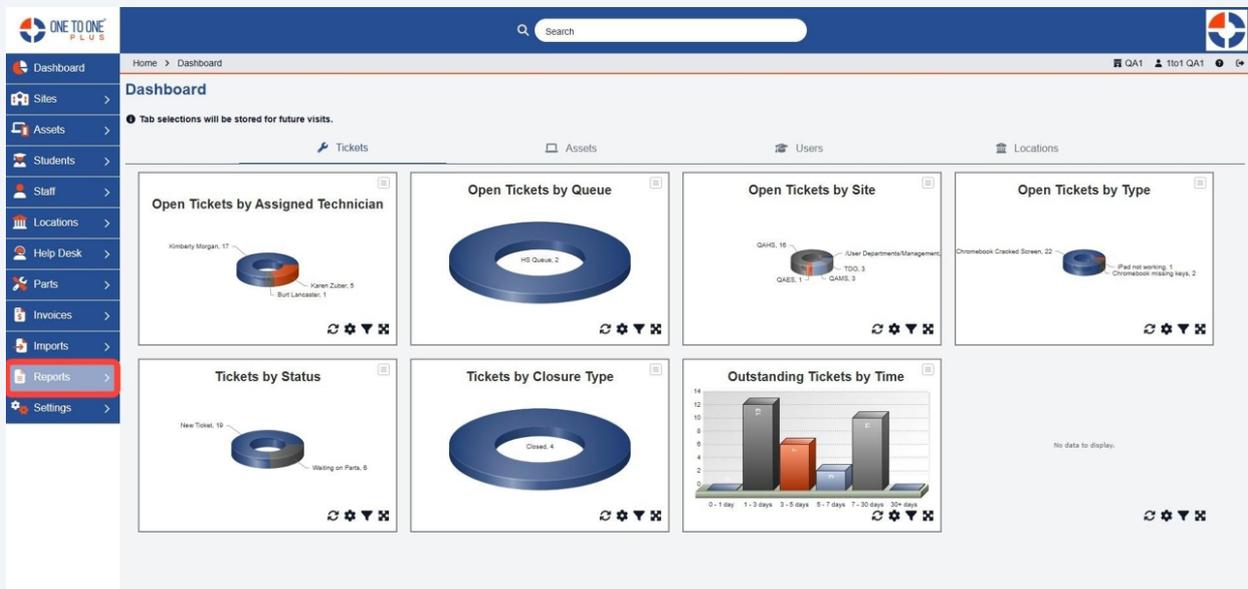


# Generate Custom Reports



This guide outlines a simple process for creating custom reports, helping users tailor, save, and export data for analysis. It's a valuable tool for improving data insights and decision-making.

## 1 Select "Reports".



## 2 Select "Custom Reports".

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 (highlighted with a red box), Quick Exports, Scheduled, and Settings. The main dashboard area displays several report widgets: Open Tickets by Assigned Technician, Open Tickets by Queue, Open Tickets by Site, Open Tickets by Type, Tickets by Status, Tickets by Closure Type, and Outstanding Tickets by Time. The 'Custom Reports' option is highlighted with a red box in the sidebar.

## 3 Select "Add".

The screenshot shows the ONE TO ONE PLUS 'Custom Reports' page. The left sidebar is the same as in the previous screenshot. The main content area displays a table with the following data:

Report Name	Description	Table	Created	Actions
Chromebook Asset report	Chromebook Asset report		1/23/25, 6:20 PM	

A red '+ Add' button is located in the top right corner of the table area. At the bottom of the page, there are navigation buttons for '< previous' and 'next >'. The page number '1 of 1' is displayed at the bottom left.

## 4 Select a "Report Type" to create.

ONE TO ONE PLUS

Home > Reports > Add Custom Report

QA1 1to1 QA1

### Add New Custom Report

Select a Report Type:

- Select An Option
- Tasks
- Assets
- Payments
- Users
- Invoices
- Locations

## 5 Enter a "Report Name" (this will save the report so that it can be accessed from the main custom report menu).

ONE TO ONE PLUS

Home > Reports > Add Custom Report > Custom Report for "Assets"

QA1 1to1 QA1

### Custom Report for Assets

Report Name \* Only required for saving

Description

+ Report Fields

Order By: Select An Option

Save Generate CSV Preview

## 6 Enter a report "Description".

The screenshot shows the 'Custom Report for Assets' page in the One to One Plus system. The left sidebar contains navigation options: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, Reports, Standard Reports, Custom Reports, Quick Exports, Scheduled, and Settings. The main content area has a breadcrumb trail: Home > Reports > Add Custom Report > Custom Report for "Assets". The page title is 'Custom Report for Assets'. There are three input fields: 'Report Name \*' with a placeholder 'Only required for saving', 'Description' (highlighted with a red box), and 'Order By:' with a dropdown menu 'Select An Option'. At the bottom, there are three buttons: 'Save' (green), 'Generate CSV' (blue), and 'Preview' (blue).

## 7 Select "Report Fields".

The screenshot shows the 'Custom Report for Assets' page in the One to One Plus system. The left sidebar contains navigation options: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, Reports, Standard Reports, Custom Reports, Quick Exports, Scheduled, and Settings. The main content area has a breadcrumb trail: Home > Reports > Add Custom Report > Custom Report for "Assets". The page title is 'Custom Report for Assets'. There are three input fields: 'Report Name \*' with a placeholder 'Only required for saving', 'Description', and 'Order By:' with a dropdown menu 'Select An Option'. The '+ Report Fields' button is highlighted with a red box. At the bottom, there are three buttons: 'Save' (green), 'Generate CSV' (blue), and 'Preview' (blue).

8

Click "Select All" to select all or deselect all fields.

The screenshot shows the 'Custom Report for Assets' configuration page. The left sidebar contains navigation options: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, Reports, Standard Reports, Custom Reports, Quick Exports, Scheduled, and Settings. The main content area is titled 'Custom Report for Assets' and includes a 'Report Name' field (marked as required), a 'Description' field, and a 'Report Fields' section. The 'Report Fields' section is a table with two columns: 'Field' and 'Values'. The 'Field' column lists various attributes, each with a checkbox. The 'Values' column contains input fields for each field. The 'Select All' checkbox is highlighted with a red box.

Field	Values
<input checked="" type="checkbox"/> Select All	
<input checked="" type="checkbox"/> Asset ID	Select Some Options
<input checked="" type="checkbox"/> Serial Number	Select Some Options
<input checked="" type="checkbox"/> Mac Address	Select Some Options
<input checked="" type="checkbox"/> Model	Select Some Options
<input checked="" type="checkbox"/> Turned In?	Select Some Options
<input checked="" type="checkbox"/> Turned In Date	Start Date End Date
<input checked="" type="checkbox"/> Purchase Order	Select Some Options

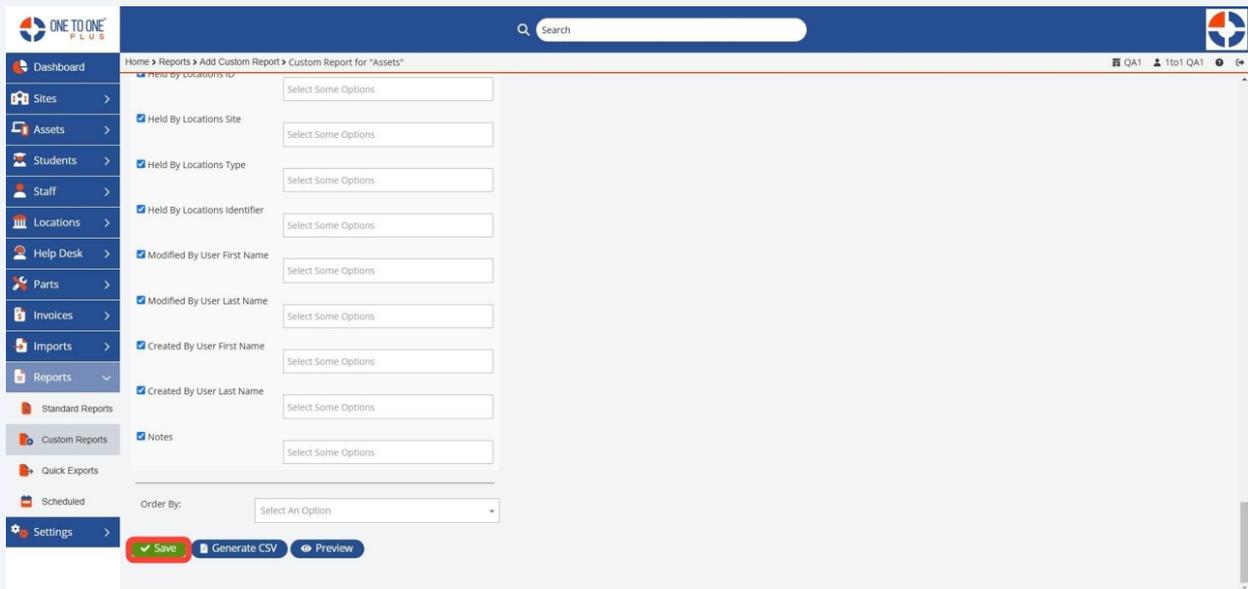
9

Pick the fields you wish to display on the report.

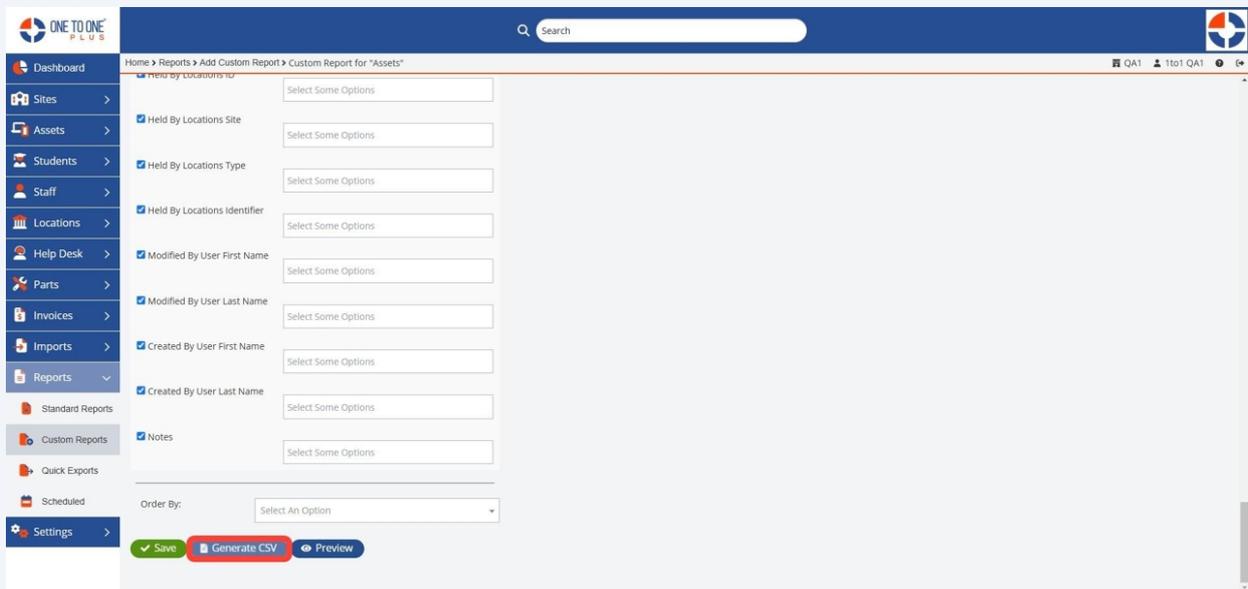
The screenshot shows the 'Custom Report for Assets' configuration page, similar to the previous one. In this view, the 'Asset ID' checkbox in the 'Report Fields' section is highlighted with a red box, indicating that the user is selecting specific fields to display on the report.

Field	Values
<input checked="" type="checkbox"/> Select All	
<input checked="" type="checkbox"/> Asset ID	Select Some Options
<input checked="" type="checkbox"/> Serial Number	Select Some Options
<input checked="" type="checkbox"/> Mac Address	Select Some Options
<input checked="" type="checkbox"/> Model	Select Some Options
<input checked="" type="checkbox"/> Turned In?	Select Some Options
<input checked="" type="checkbox"/> Turned In Date	Start Date End Date
<input checked="" type="checkbox"/> Purchase Order	Select Some Options

10 Select "Save" to save the custom report.



11 Select "Generate CSV" to create a file of the custom report data.



## 12 Select "Preview" to view the custom report.

The screenshot displays the 'ONE TO ONE PLUS' software interface. The top navigation bar includes the logo, a search bar, and user information (QA1, 1to1 QA1). The left sidebar contains a menu with categories: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, Reports, Standard Reports, Custom Reports, Quick Exports, and Settings. The main content area is titled 'Home > Reports > Add Custom Report > Custom Report for "Assets"'. It features a list of filter criteria, each with a checked checkbox and a 'Select Some Options' dropdown menu:

- Held By Locations Site
- Held By Locations Type
- Held By Locations Identifier
- Modified By User First Name
- Modified By User Last Name
- Created By User First Name
- Created By User Last Name
- Notes

Below the filters is an 'Order By:' dropdown menu with the text 'Select An Option'. At the bottom of the configuration area are three buttons: 'Save' (green), 'Generate CSV' (blue), and 'Preview' (red, highlighted with a red circle).