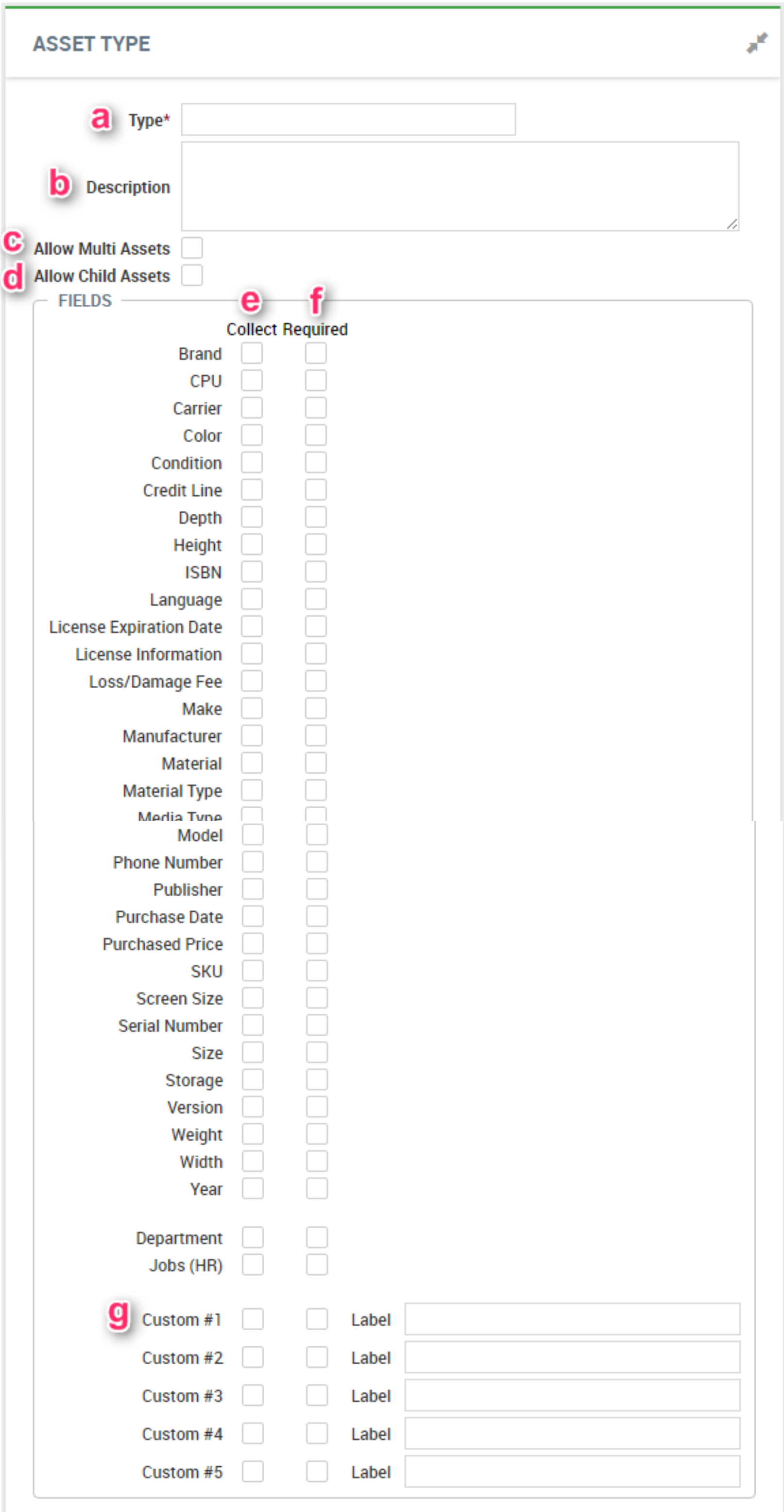
Asset Tracking Guide

Asset Types (Not including vehicles)

- Go to **Company Settings > HR Setup > Assets (Property) > Asset Types**
- Some common asset types have been created for you.
- Select the 

button to create a new asset type, if needed



a. **Type**: Enter the name of the asset type (Ex. Keys)

b. **Description**: Enter a description of the asset, if necessary

c. **Allow Multi Assets**: Check this box if you have multiple of the exact same item (for example, if your company has 50 large uniform shirts, you do not need to enter 50 individual shirts). This will allow you to assign an asset to more than one employee.

d. **Allow Child Assets**: Check this box if you want to assign sub-assets (for example, a computer as the main asset, and the software as child assets). When the main asset is assigned to an employee, all child assets will be assigned as well.

e. **Collect**: Check the boxes for the information to collect on the asset. Cost centers are listed below the standard items. Checking the cost center boxes allows you to allocate an asset to a specific cost center or job.

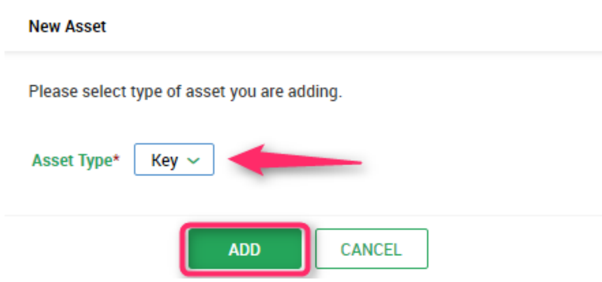
f. **Required**: Check the boxes for any information that is required to collect

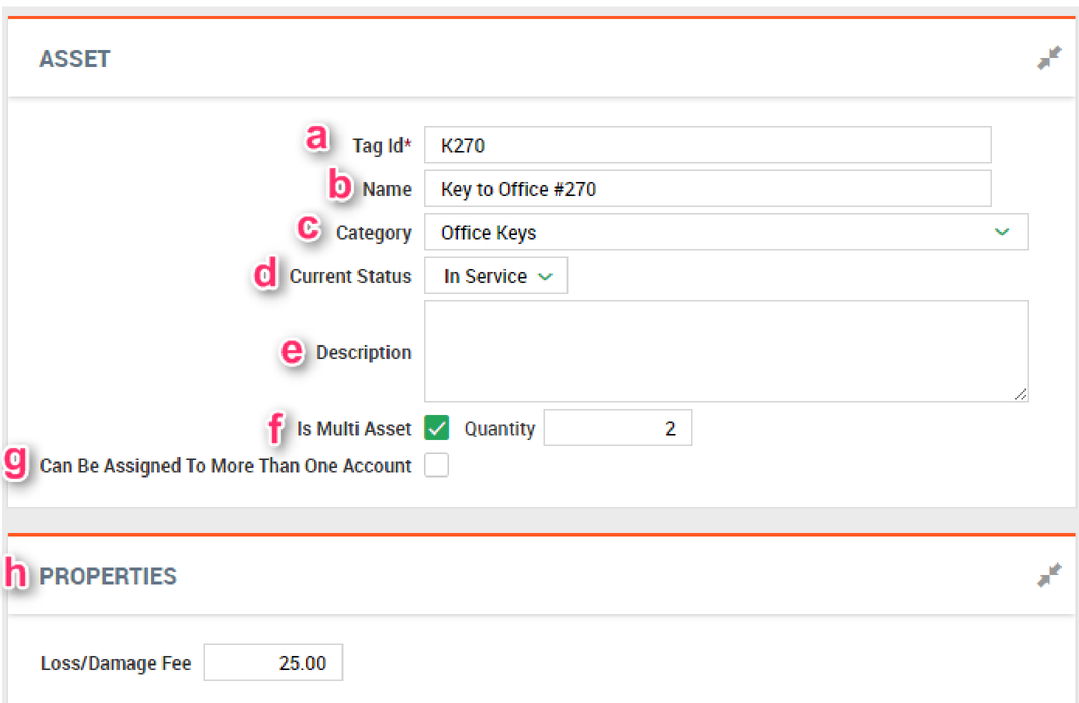
g. **Custom Fields**: If you need to collect additional information, up to 5 custom fields are available to create (Ex. Warranty Expiration Date)

Assets (Property)

In order to assign assets to an employee, they must be included in your list of assets in Workforce Link

- Go to **Company Settings > HR Setup > Assets (Property)**
  - This screen lists the specific assets in your company inventory
  - Select the ADD NEW button to add an asset to the list.
  - Select the asset type from the dropdown menu and click *Add*



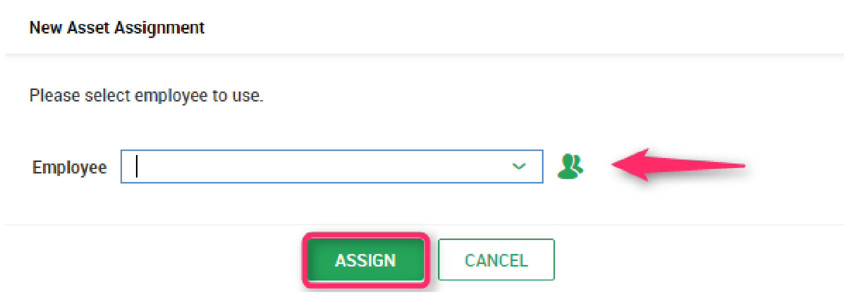


  - Enter the asset details and properties
    - a. **Tag ID**: Enter a tag for the item. This can be anything that your company uses to track the item such as a code, number, or simply a name.
    - b. **Name**: Enter the name of the item
    - c. **Category**: Select from the dropdown. If the category you are looking for is not available, it can be typed in. In this example, Keys is the asset type, but Office Keys, File Cabinet Keys, and Cash Register Keys are categories.
    - d. **Current Status**: Select the status of the item. Typically, items being entered will be “In Service,” meaning they are available to assign to an employee.
    - e. **Description**: Optional description of the item
    - f. **Is Multi-Asset**: Checking this box will bring up another field for Quantity. Enter the quantity of these assets that are available to assign.

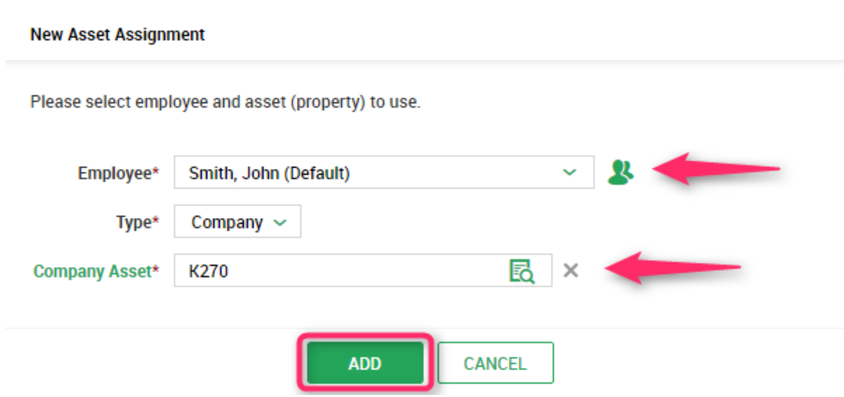
        - g. **Can Be Assigned to More Than One Account**: Check this box if this one specific item can be assigned to more than one employee at a time. For example, two part time employees who share one computer.
        - h. **Properties**: Fields for the information selected to be collected for this asset type will appear under Properties. Required fields will be marked with an *.
    - Once all information has been entered, click SAVE
    - Notes and Documents can be added to the asset by selecting the ADD NOTE or UPLOAD DOCUMENT buttons.
    - If child assets were enabled, the ADD CHILD ASSET button will allow you to create a secondary asset.
        - Once the information has been entered for the child asset, it will be linked to the parent asset. Employees who are assigned a parent asset will be assigned any linked child assets automatically.

<u>Assigning Assets</u>

- Assets can be assigned in one of four ways:
    - Directly from the Asset screen - **Company Settings > HR Setup > Assets (Property) > Assets (Property)**
        - Select the icon for the asset you want to assign.
        - Select ASSIGN TO EMPLOYEE
        - Select the employee and click *Assign*



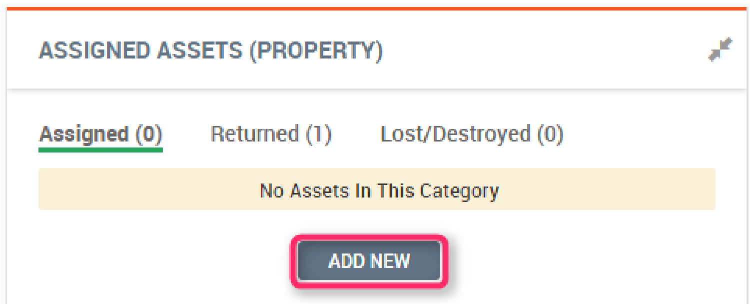
        - Enter the Issue Date and Expected Return Date, if applicable. The issue date will default to today's date, but it can be changed.
        - Click SAVE
    - From the Asset Assignment screen - **My Employees > Employee HR Maintenance > Assets (Property) Assignments**
        - Select ADD NEW
        - Select the Employee and Company Asset to assign



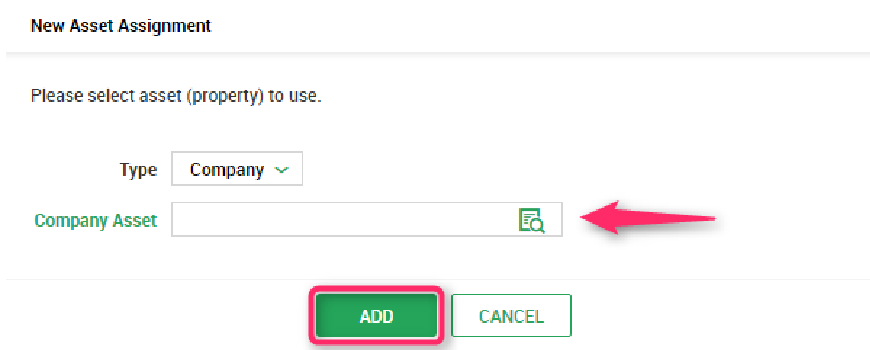
- Enter the Issue Date and Expected Return Date, if applicable. The issue date will default to today's date, but it can be changed.
- Click SAVE

○ From the Employee's Profile - **My Employees > Employee Information**

- Select the icon for the employee to whom you want to assign the asset.
- On the employee's HR tab, select ADD NEW from the *Assigned Assets* widget



- Select the Company Asset to assign to the employee



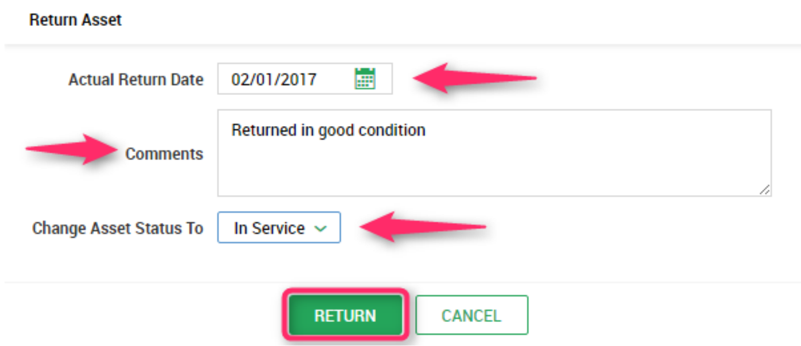
- Enter the Issue Date and Expected Return Date, if applicable. The issue date will default to today's date, but it can be changed.
- Click SAVE

○ From an import - **Company Settings > Imports > Overview**

- Select the *Asset Assignments* import template
- Complete, at minimum, the Employee ID, Assignment Type (which should be "Company"), Asset Type and Asset Tag ID.
- Assets assigned this way must have already been created in the system.

<u>Managing Assets</u>

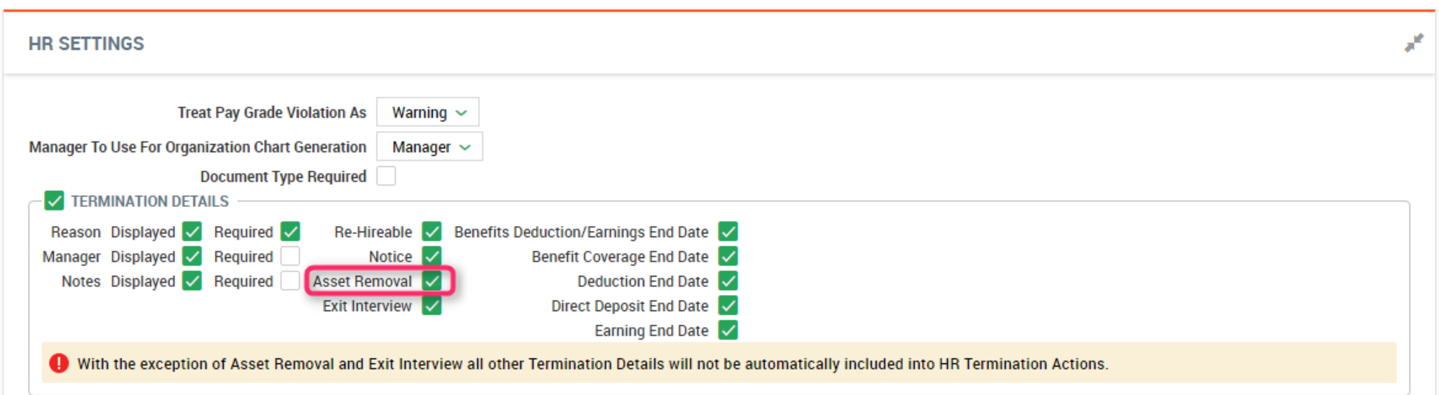
- Go to **My Employees > Employee HR Maintenance > Assets (Property) Assignments**
- Select the icon for the asset you need to manage
- Select the RETURN ASSET or MARK AS LOST / DESTROYED button to change the status of the asset.
- Enter the return (or lost/damaged) date and comments, and change the asset status, if needed.



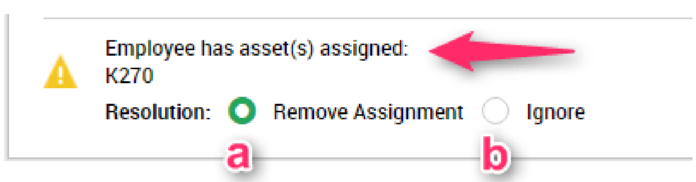
- Child Assets will update along with the parent asset.

Tracking Assets Upon Termination

- Go to **Company Settings > Global Setup > Company Setup > HR Tab**
  - Check the *Asset Removal* box in the *Termination Details* widget.



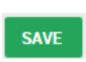
  - This will notify you upon terminating an employee, if the employee has an asset that needs to be returned.



    - a. **Remove Assignment** - moves the asset to "returned" status
    - b. **Ignore** - requires that the asset be updated manually
- Assets can also be added to an HR action for termination.

Vehicles

- Go to **Company Settings > HR Setup > Assets (Property) > Vehicles**
- Select 

  - Enter the vehicle information
  - The *Make* and *Model* dropdowns will be blank initially, and will need to be typed in rather than selected. As vehicles are entered, the makes and models will be saved as options in the dropdown list.
  - Select 

- Once the car information has been saved, widgets for insurance, maintenance, notes and supporting documents will appear.

- Add insurance information by selecting the ADD INSURANCE button
- Add maintenance information, notes and documents by selecting the ··· button and choosing the ADD MAINTENANCE , ADD NOTE , or UPLOAD DOCUMENT option.

- Assigning a vehicle to an employee is similar to assigning an asset
  - Select the ASSIGN TO EMPLOYEE button.
  - The Vehicle Assignment widget includes fields for *Issue Value $* and *Issued Odometer Reading*, but is otherwise identical to any other asset.
- Assigned Vehicles are viewed in a separate location from other assets.
  - Go to **My Employees > Employee HR Maintenance > Vehicles** to view a list of vehicles assigned to employees