



WORKFORCE ONE

Asset & Vehicle Creation/Assignment/Tracking

CONTENTS

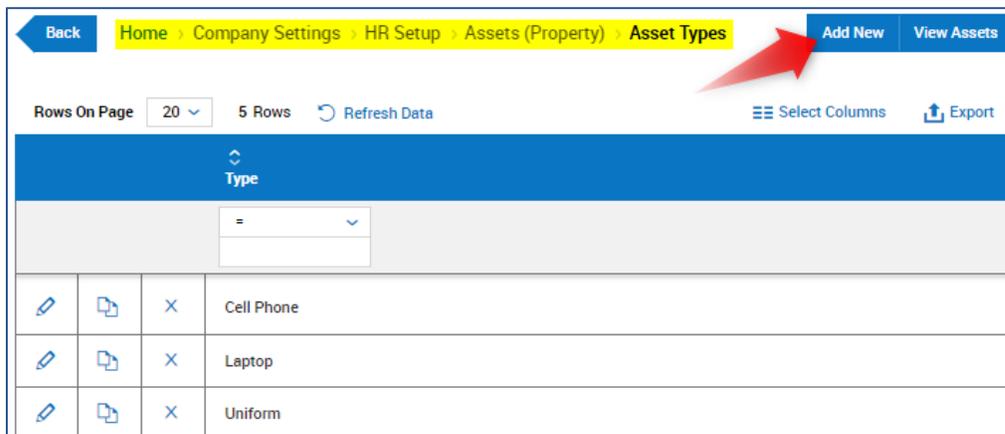
Asset & Vehicle Creation/Assignment/Tracking	3
Example: Creating an Asset Type.....	3
Create an Asset	5
Assign the Asset to an Employee	7
Adding a Vehicle	9
Assign a Vehicle.....	10
Tracking Assets & Vehicles	11
Asset Tracking	11
Vehicle Tracking.....	11

Asset & Vehicle Creation/Assignment/Tracking

The first step when utilizing the asset management tool is to create asset types. Assets like employer-provided cell phones, laptops, uniforms, etc. After assets are created they are easily assigned to employees after hired (or when they're given the asset). Before you can assign an asset to an employee, you must create the type of asset and then enter information about the actual asset itself.

Example: Creating an Asset Type

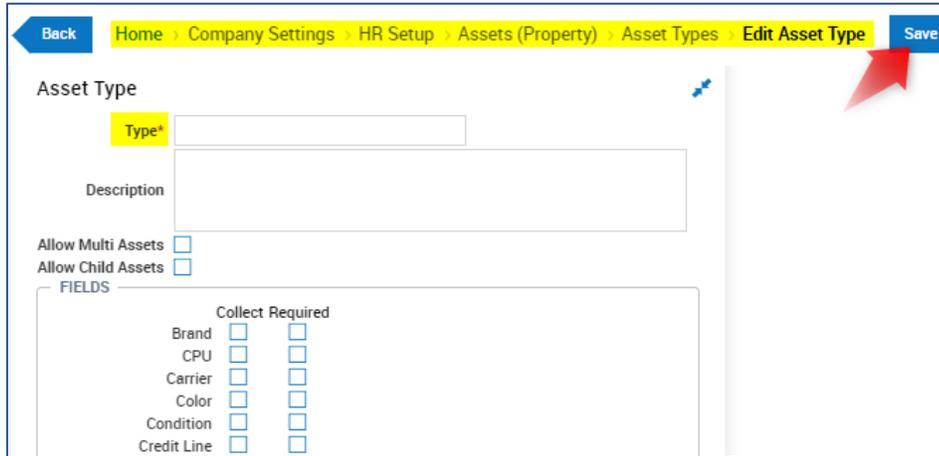
1. Select the **Hamburger Menu**.
2. Select **Company settings**.
The menu expands.
3. Select **HR Setup**.
The menu expands.
4. Select **Assets (Property)**.
5. Select **Asset Types**.
6. Select the **Add New** button.
As shown below



7. Enter the name of the asset and any other properties you want to track.

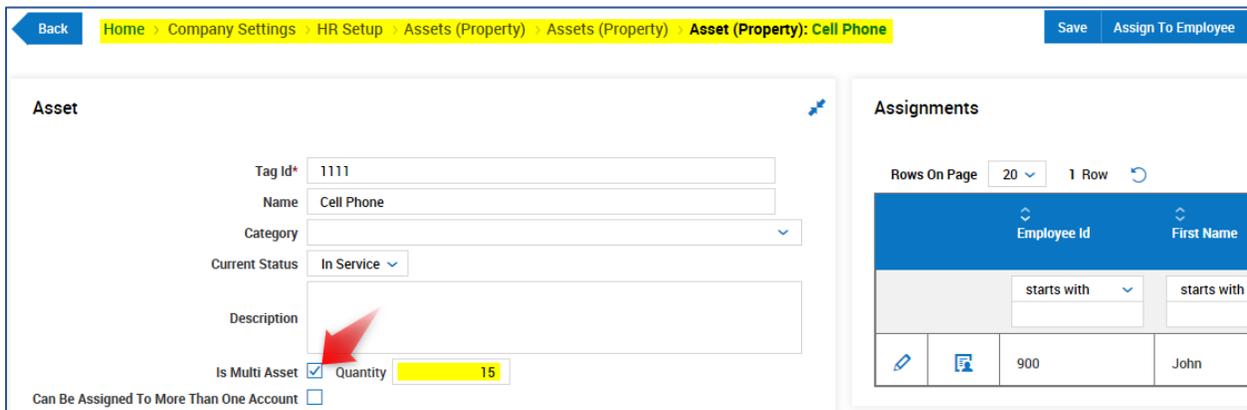
Child assets allow you to create sub assets which belong to the main asset. For example, a computer would be the main asset and the software installed on that computer would be the child asset. Anything checked in the **Collect** column will add a description field to the asset. The

Required column will make the field a requirement (i.e., laptop serial number) before you can save the new asset.



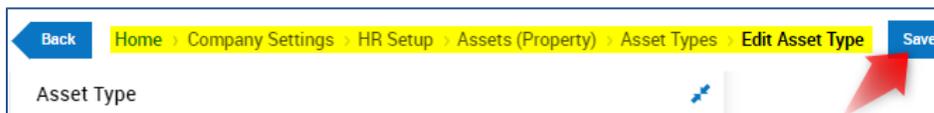
	Collect Required
Brand	<input type="checkbox"/>
CPU	<input type="checkbox"/>
Carrier	<input type="checkbox"/>
Color	<input type="checkbox"/>
Condition	<input type="checkbox"/>
Credit Line	<input type="checkbox"/>

Selecting **Allow Multi Assets** allows you to assign the same asset multiple times, i.e., 15 desk chairs. If you select this option, another field will display allowing you to enter the number of assets you have. The **Can Be Assigned To More Than One Account** allows you to assign an asset to more than just one account.



Employee Id	First Name
900	John

8. Save the asset type.



Create an Asset

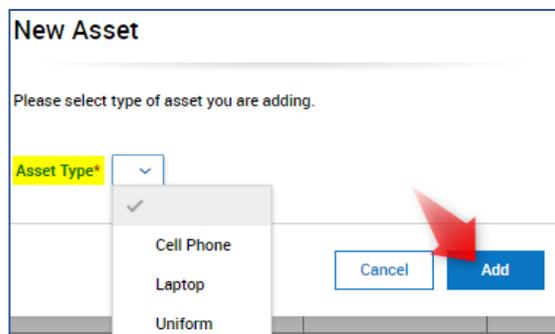
Now that the asset types are created you can add actual assets to your inventory and eventually assign them to employees.

1. Select **Company Settings**.
2. Select **HR Setup**.
3. Select **Assets (Property)**.
4. Select the **Add New** button (shown below).



The New Asset window will open.

5. Select the **Asset Type** dropdown menu and choose your asset.
6. Select the **Add** button. (shown below)



After the asset type has been selected, you will be prompted to enter asset details. (shown below).

Back Home > Company Settings > HR Setup > Assets (Property) > Assets (Property) > Asset (Property): Uniform Save

Asset

Tag Id* Wait Staff Uniform

Name

Category

Current Status In Service

Description

Is Multi Asset Quantity

Can Be Assigned To More Than One Account

Properties

Brand

Color

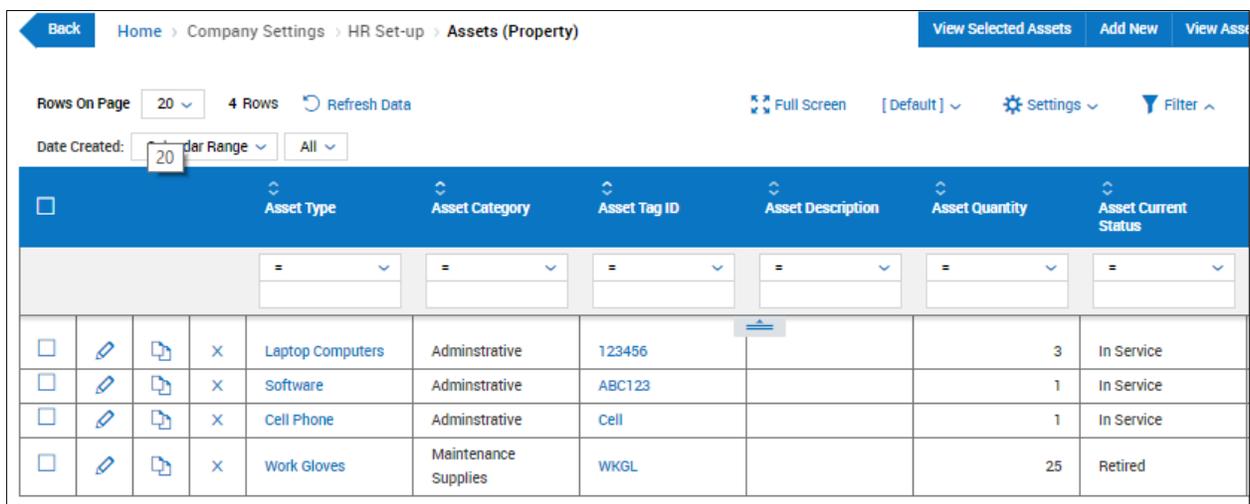
7. Select **Save**.

Assign the Asset to an Employee

Now that the asset type has been set up and the asset has been added to the system, you can assign the asset to your employees.

1. Select **Company Settings**.
2. Select **HR Setup**.
3. Select **Assets (Property)**.

From the Assets (Property) display, select the pencil icon next to the icon you want to assign. Let's select Laptop Computers.



Assets (Property)						
Asset Type	Asset Category	Asset Tag ID	Asset Description	Asset Quantity	Asset Current Status	
Laptop Computers	Administrative	123456		3	In Service	
Software	Administrative	ABC123		1	In Service	
Cell Phone	Administrative	Cell		1	In Service	
Work Gloves	Maintenance Supplies	WKGL		25	Retired	

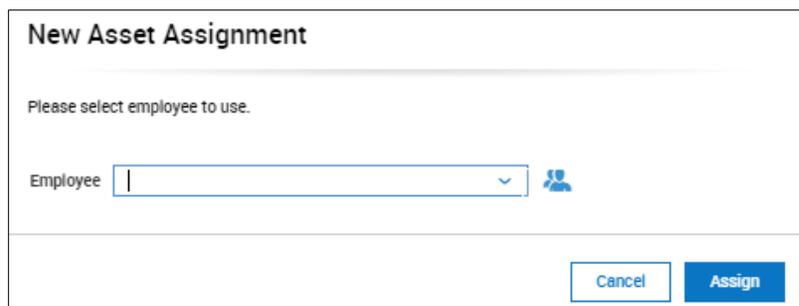
4. Select the **Assign to Employee** button (shown below).



Back	Home > ... > Asset (Property): Laptop Computers	Save	Add Child Asset	Assign To Employee	...
------	---	------	-----------------	--------------------	-----

A New Asset Assignment pop up window will display where you can select the employee.

5. Select the icon to choose your employee. (Shown Below).



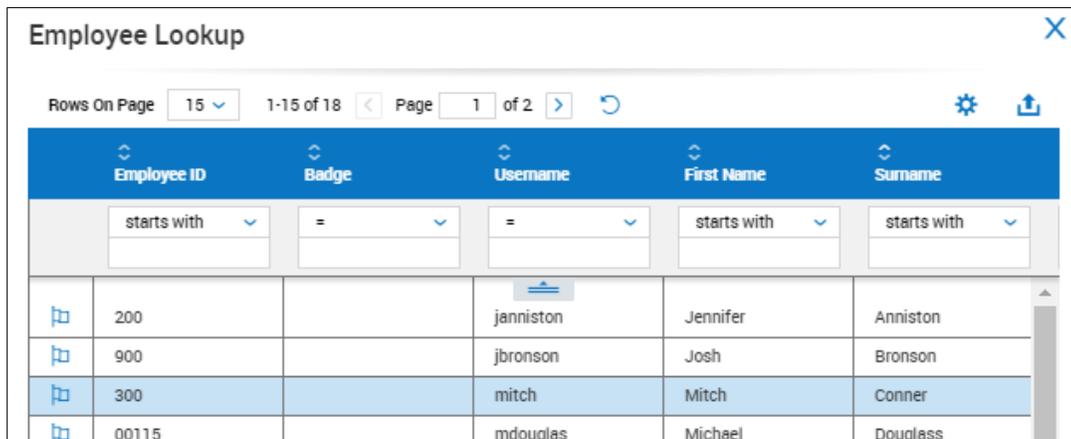
New Asset Assignment

Please select employee to use.

Employee 

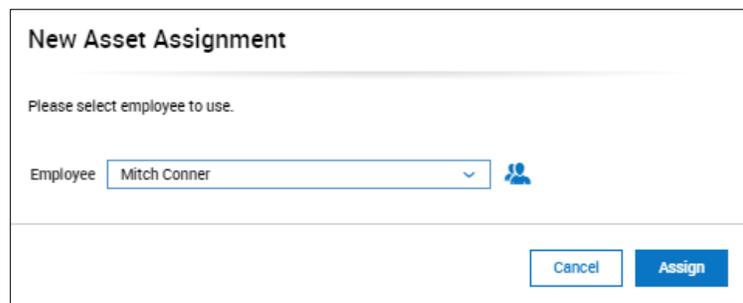
An Employee Lookup page will display all employees in the company. You can use a search filter or just scroll depending on how many people you have in the company.

6. Select the **flag icon** next to the employee you want to have the asset assigned. (Shown below)



Employee ID	Badge	Username	First Name	Surname
starts with	=	=	starts with	starts with
 200		 janniston	Jennifer	Anniston
 900		jbronson	Josh	Bronson
 300		mitch	Mitch	Conner
 00115		mdouglas	Michael	Douglass

7. Select the **Assign** button (shown below).



New Asset Assignment

Please select employee to use.

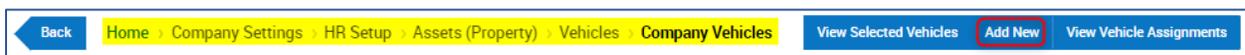
Employee 

8. Select **Save** and the asset is now assigned to Mitch.

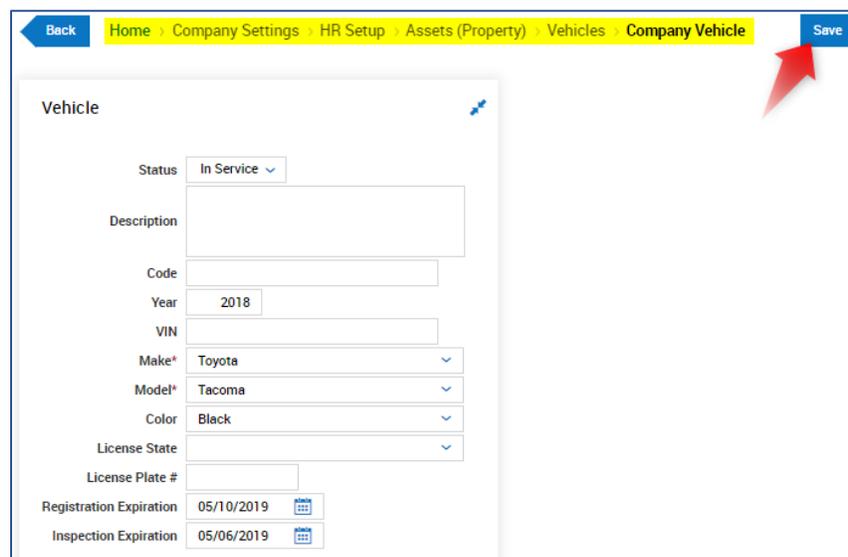
Adding a Vehicle

Vehicle assets are added in a different location and offer more description and record keeping options, such as insurance and maintenance. Let's add a vehicle now.

1. Select **Company Settings**.
2. Select **HR Setup**.
3. Select **Assets (Property)**.
4. Select **Vehicles**.
5. Select the **Add New** button.



6. The status dropdown should be In Service (if it is in use).
7. Enter other information that you want included.
8. The fields with the red asterisks must be filled out (Make and Model).
9. Select **Save**. (Shown below)



Vehicle

Status: In Service

Description: [Text Field]

Code: [Text Field]

Year: 2018

VIN: [Text Field]

Make*: Toyota

Model*: Tacoma

Color: Black

License State: [Dropdown]

License Plate #: [Text Field]

Registration Expiration: 05/10/2019

Inspection Expiration: 05/06/2019

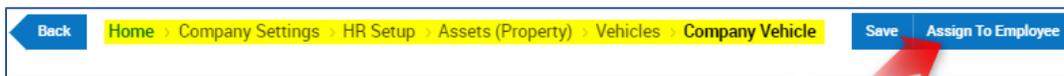
Assign a Vehicle

Assigning a vehicle is very similar to assigning an asset.

1. Select **Company Settings**.
2. Select **HR Setup**.
3. Select **Assets (Property)**.
4. Select **Vehicles**.

This will display all vehicles in inventory.

5. Select the pencil icon next to the vehicle you want to assign.



The New Vehicle Assignment window will open so you can select the employee.

6. Choose your employee.
7. Select the Assign button (Shown below).



A screenshot of the 'New Vehicle Assignment' window. The title is 'New Vehicle Assignment'. Below the title is a text prompt: 'Please select employee to use.' There is a search input field labeled 'Employee*' with a person icon on the right. Below the input field are two buttons: 'Cancel' and 'Assign'. A red arrow points to the 'Assign' button.

8. Select Save. (Shown below)



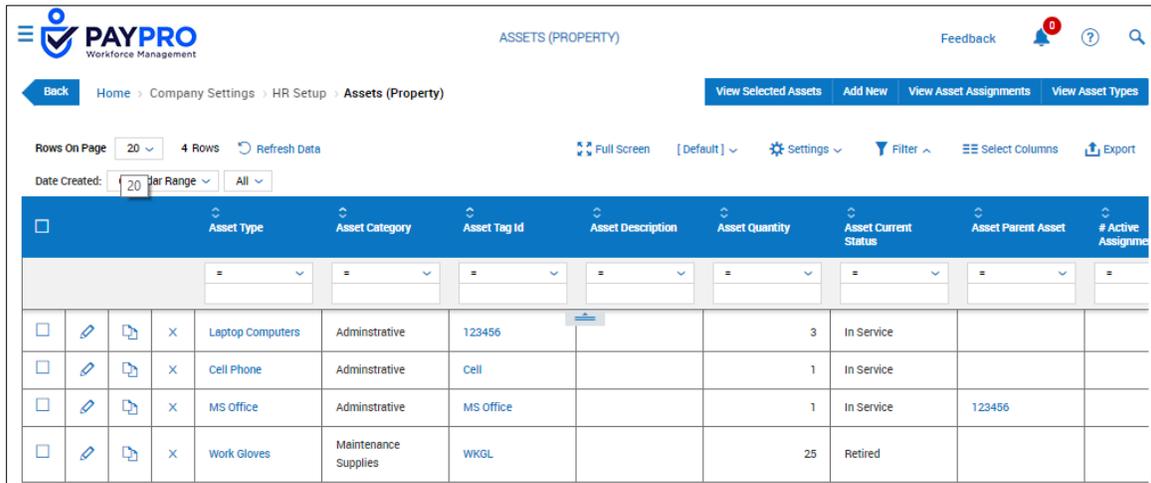
Tracking Assets & Vehicles

The Asset Property page will show all assets that have been created for the company whether they are assigned to an employee or not. Vehicles are in a different location, but all are listed. Let's look at our assets and vehicles now.

Asset Tracking

First let's look at Assets. This page lists all assets (parent and child) in the company, whether assigned or not, but not vehicles.

1. Select **Company Settings**.
2. Select **HR Setup**.
3. Select **Assets (Property)**.



The screenshot shows the 'ASSETS (PROPERTY)' page in the PAYPRO system. The page includes a navigation breadcrumb: Home > Company Settings > HR Setup > Assets (Property). There are buttons for 'View Selected Assets', 'Add New', 'View Asset Assignments', and 'View Asset Types'. The table below lists various assets with columns for selection, edit, delete, asset type, category, tag ID, description, quantity, current status, parent asset, and active assignments.

<input type="checkbox"/>				Asset Type	Asset Category	Asset Tag Id	Asset Description	Asset Quantity	Asset Current Status	Asset Parent Asset	# Active Assignments
<input type="checkbox"/>				Laptop Computers	Administrative	123456		3	In Service		
<input type="checkbox"/>				Cell Phone	Administrative	Cell		1	In Service		
<input type="checkbox"/>				MS Office	Administrative	MS Office		1	In Service	123456	
<input type="checkbox"/>				Work Gloves	Maintenance Supplies	WKGL		25	Retired		

Vehicle Tracking

This page lists all vehicles, whether assigned or not, in the company.

1. Select **Company Settings**.
2. Select **HR Setup**.
3. Select **Assets (Property)**.
4. Select **Vehicles**.

COMPANY VEHICLES

Feedback   

[Back](#) [Home](#) > [Company Settings](#) > [HR Setup](#) > [Assets \(Property\)](#) > [Vehicles](#) > **Company Vehicles** [View Selected Vehicles](#) [Add New](#) [View Vehicle Assignments](#)

Rows On Page: 2 Rows [Refresh Data](#) [Full Screen](#) [Default] [Settings](#) [Select Columns](#) [Export](#)

<input type="checkbox"/>	Vehicle Code	Vehicle Name	Vehicle Description	Vehicle Year	Vehicle Make	Vehicle Model	Vehicle Color	Vehicle VIN
<input type="checkbox"/>	-	-	-	-	-	-	-	-
<input type="checkbox"/>	Executives	Range Rover Discovery 2019 (Executives)		2019	Range Rover	Discovery	Red	
<input type="checkbox"/>	Sales	Toyota Camry 2009 (Sales)		2009	Toyota	Camry	Silver	ABE155487