Overview

The Human Resource (HR) screens in isolved provide the tracking mechanism to provide insight into managing employees effectively. The HR data can store information about company assets. The data can be available to the employee, manager, and HR admin through self-service. Managers can effectively manage the acquisition, distribution, and return of all assets assigned.

To get started, enter the HR data that is most important to your business on the **Client Management > HR Management > Company Asset Types** screen. Then, HR information is assigned, and the employees are assigned an asset on the appropriate **Employee Management > Human Resources > Company Assets** screen. All the HR screens have corresponding reports, and the data is available in the report writer, providing the ability for custom reporting.

Create a List of Company Assets

How does your company keep track of the company assets that are assigned to employees? Add each asset type that an employee may possess while employed at your company. This list becomes a drop-down where you can make selections for each employee and you may add to the list at any time.

To get started, enter the HR data that is most important to your business by following the steps below:

1. Navigate to **Client Management > HR Management > Company Asset Types**
2. Click **Add New**
3. Enter the **Asset Type Description**
4. Click **Save**
   Note: If Inactive is selected, the description no longer appears in the employee Company Asset drop-down menu.

Assigning Company Assets to Employees

Follow the steps below to assign company assets to employees.

1. Navigate to **Employee Management > Human Resources > Company Assets.**
2. Click **Add New**
3. Select the **Asset Type** (required).
4. Add the **Asset Make, Model, Serial Number,** and **Equipment Number** (optional)
5. Enter the **Date Assigned** (optional)
6. Enter the **Date Returned** (optional)
7. **Comments** (optional)
8. Click **Save**

When an employee is terminated, the termination report reflects all assets not yet returned. There is an optional area to enter an **Asset Description**. Please note, the **Asset Description** has a 500-character limit. Historical data of all assets assigned to each employee is maintained at the top of the screen.

Reports

1. Navigate to **Reporting > Client Reports**.
2. Select the “HR Reports” category or filter for the appropriate report name.
3. The “Employee Company Assets Report” provides all assets within the date range.

You can also filter the report within that date range for specific information.

May 31, 2024

Report Writer

All data stored for HR topics are available on the **Report Writer** screen, allowing you to create a custom report. The report can pull multiple entries to reflect all the employees' records.

To create custom reports for HR subjects, follow these steps:

1. Navigate to **Reporting > Report Writer.**
2. The **Report Setup** tab is selected by default.
3. Click **Add New.**
4. **Report Type**: Select "HR Report."
5. **Sub Report Type**: Select "Asset Report."
6. Add a **Report Title**.
7. Change the **Font Size** and **Face** if desired.
8. Select the **Report Group**.
9. Enter an optional **Description**.
10. Click **Save.**

Add Columns & Edit Columns tabs

To add columns, follow these steps:

1. Select the **Add Columns** tab.
2. Select the **Field Category** from the drop-down menu (e.g., "Employee Certifications" or "Employee Status").
3. In the **Column** area, select the column headers that should be included.
4. Use the **>>** and **<<** arrows to move them in and out of the report.
5. If needed, select the up and down arrows to the right of the **Added Columns** section to sort the columns.
6. Click **Save**.

If needed, columns can be edited to change their width, alignment, position, sort, and value. To edit columns, follow these steps:

1. Select the **Edit Columns** tab.
2. Select the column that you wish to edit.
3. Select **Edit** in the action bar.
4. Make your selections from the **Column Details** section.
   Click **Save**.

Report Filters tab

Report filters can be set on a column for a specific filter value. For example, the "Employment Status" column can filter just "Active" employees if needed. If changes are made, be sure to select **Save**.

Preview by Company tab

1. Select the report's desired **Company**, **From** and **To Dates**, **Date Type**, and **Output Type**.
2. Click **Generate Report**
3. Select **Go to My Report Queue** to view the report
4. Click **View Report**

Note: Once your report request has been submitted you can do any of the following: run another report, go to **My Reports Queue** to retrieve reports, or exit this screen to perform other tasks. This report is available in **My Reports Queue** for 72 hours.

isolved
Help Docs

Company Assets

May 31, 2024