

Employee Reference Manual

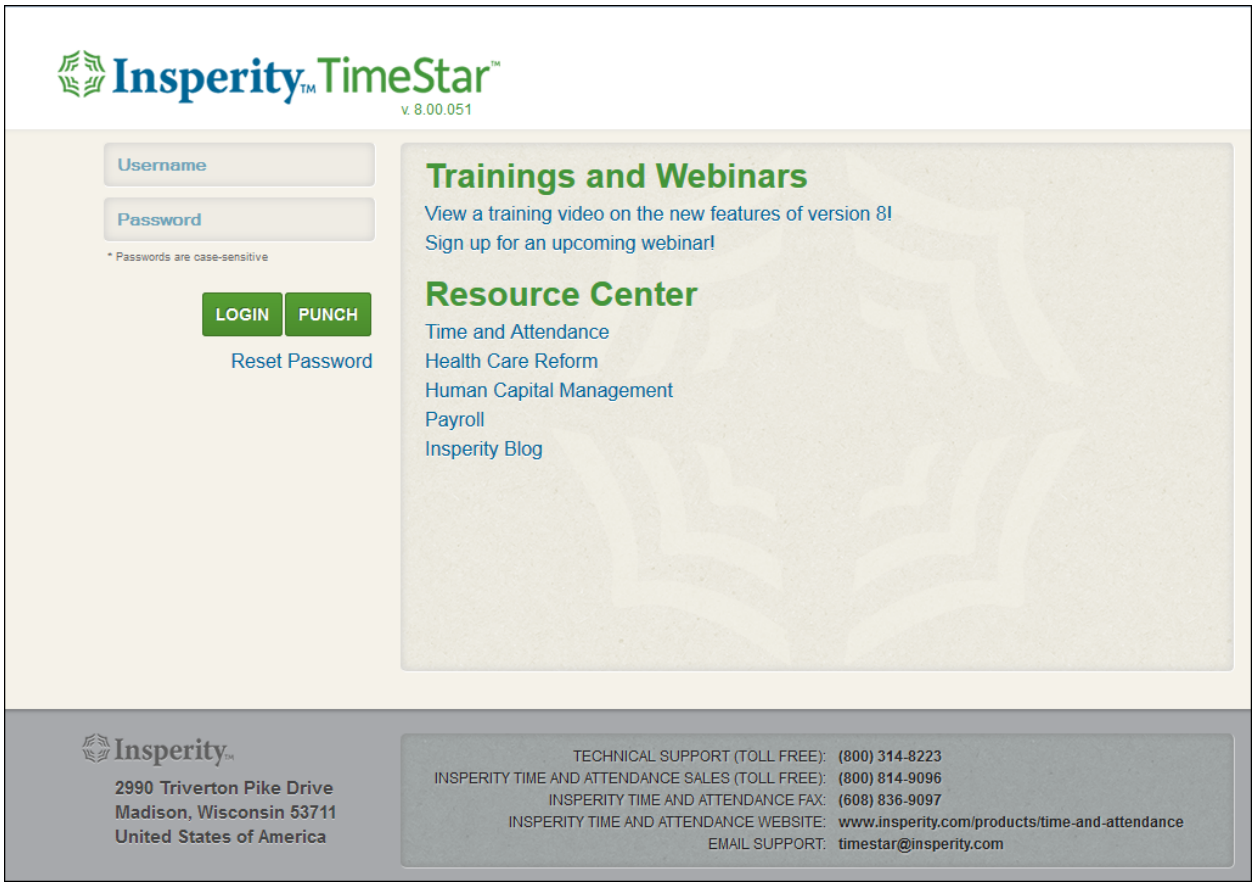
Insperity
Time and
Attendance

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Employee Routines

How to Login to TimeStar™:



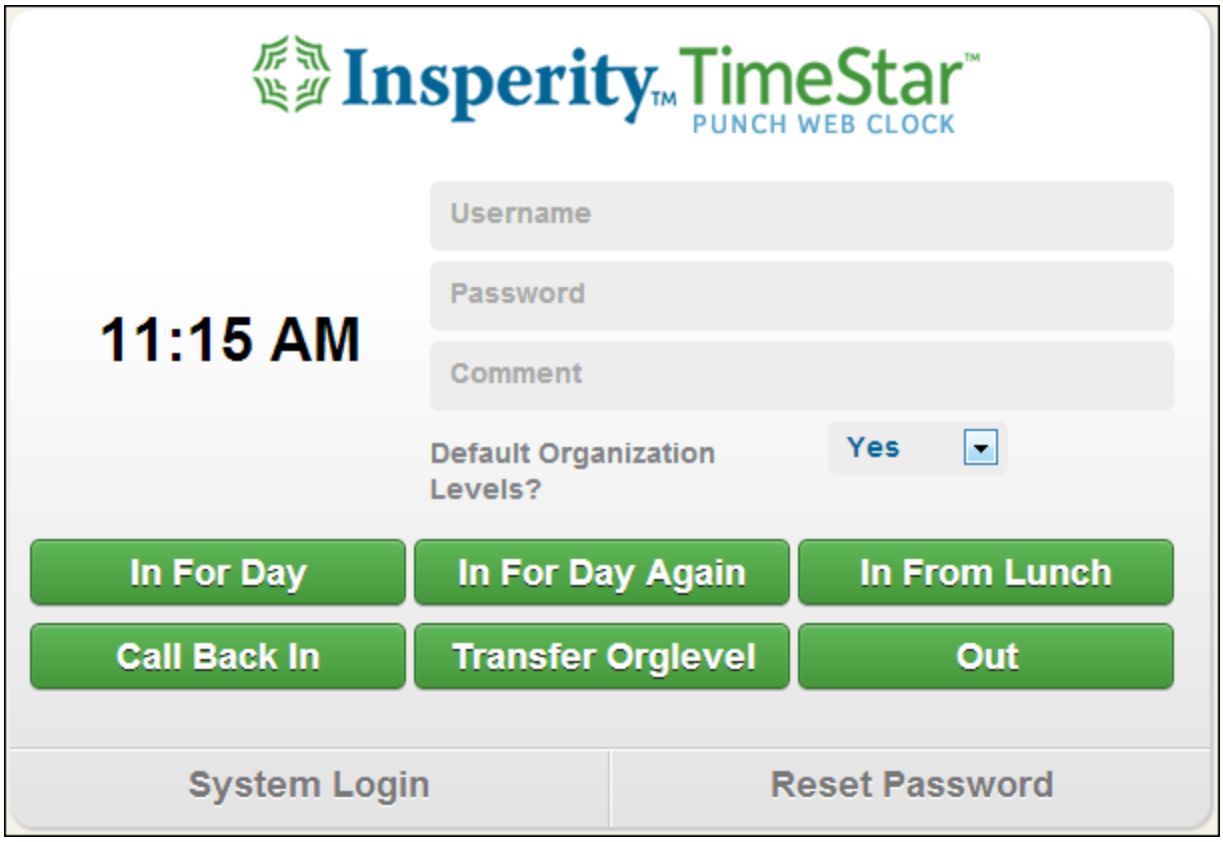
The Insperity™ TimeStar™ login page is the user's first step in accessing information within the TimeStar™ system. To access the login page, the user must enter the URL established for their company.

The user must enter their user name and password and press the 'Enter' key or click the 'Login' button to enter TimeStar™.

The content that is displayed in the middle of the login screen can be changed. Please contact an Insperity Time and Attendance Professional Services Representative for assistance with this setup.

How to Punch using the Web Punch:

There are three ways to access the TimeStar™ Web Punch feature.



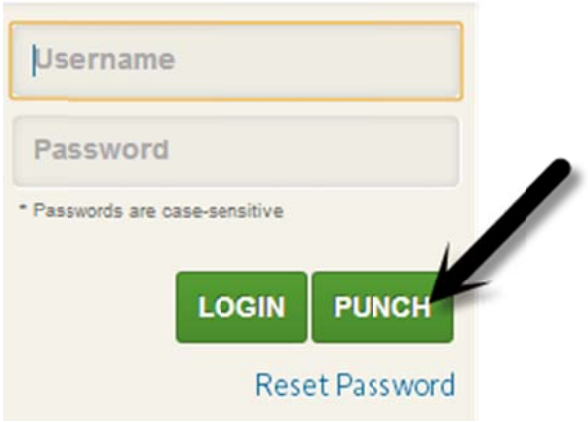
Option 1:

1. An employee must enter the URL established for their company to punch in and out using the TimeStar™ web punch feature.
2. The employee must enter their Username and Password.
3. The employee may enter a Comment associated with the punch if needed.
4. The employee must click an action button that defines the punch.

After the employee clicks the action button, they will be redirected to the TimeStar™ login page. The login page will contain a green indicator line displaying the punch that was successfully added to the system.

Option 2:

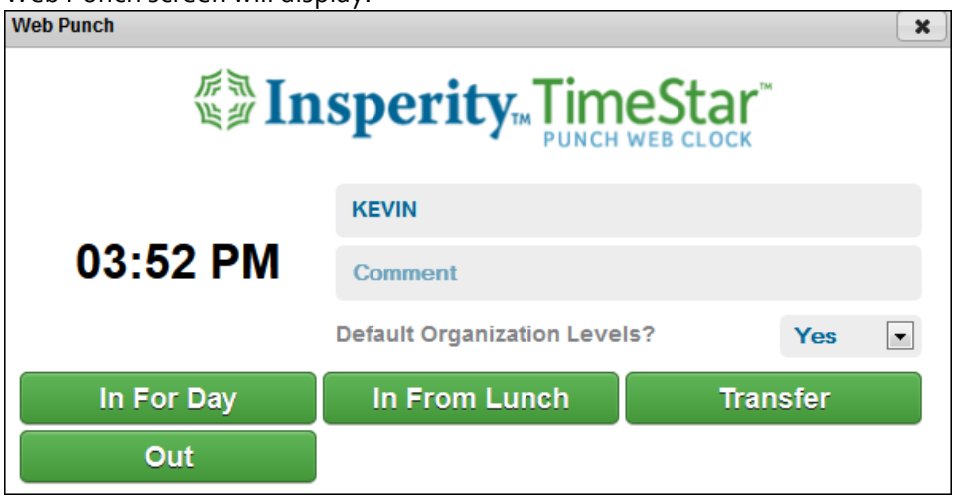
An employee can access the TimeStar™ web punch feature by entering the login page URL established for their company.



1. The employee must enter their Username and Password.
2. The employee must click the 'Punch' button.
3. After clicking the 'Punch' button, the Web Punch page will display.
4. The employee may enter a Comment associated with the punch if needed.
5. The employee must click an action button that defines the punch.

After the employee clicks the action button, they will be redirected to the TimeStar™ login page. The login page will contain a green indicator line displaying the punch that was successfully added to the system.

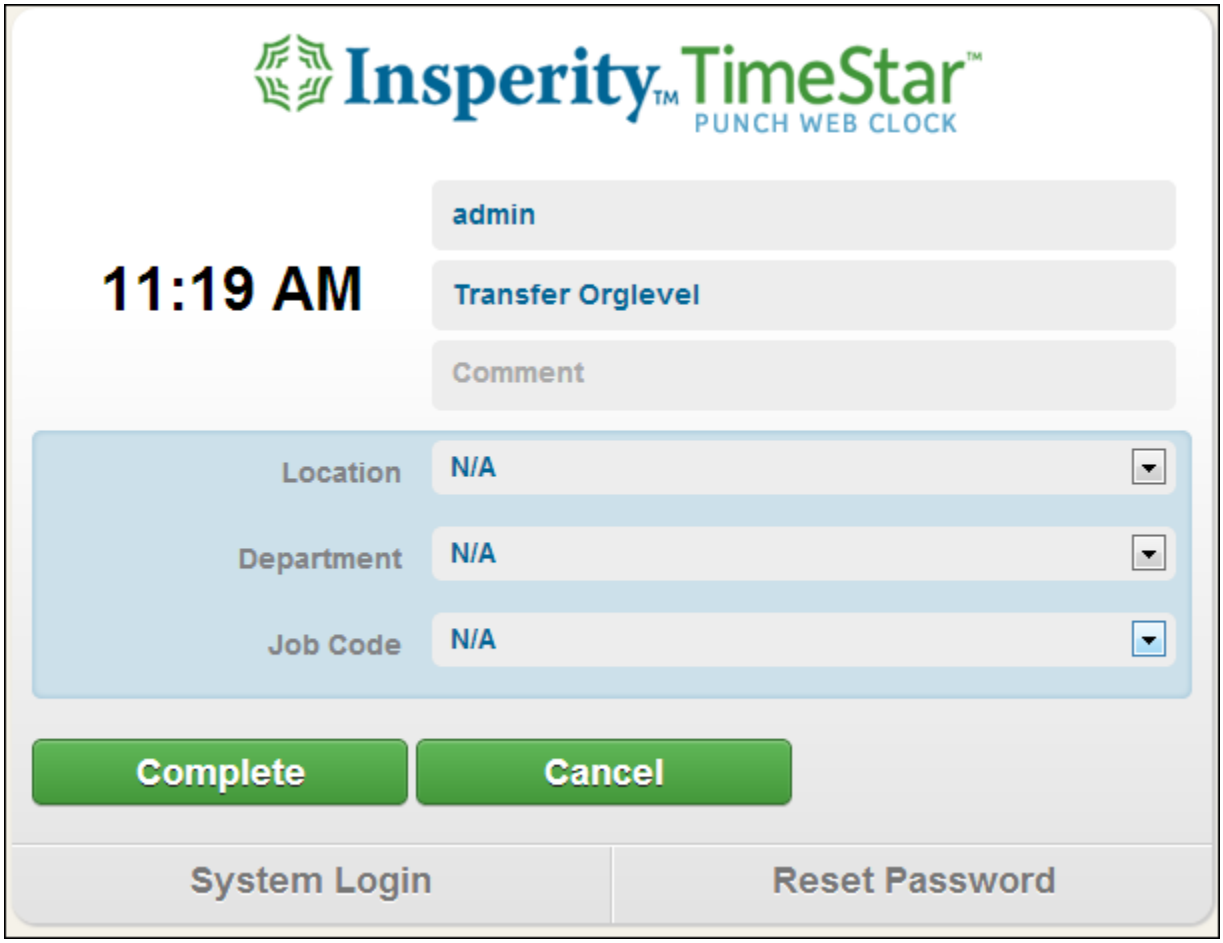
Option 3:
An employee can access the TimeStar™ Web Punch feature while logged into the system. By selecting the PUNCH IN/OUT option located in the upper right corner of the home page, the Web Punch screen will display:



1. The employee may enter a Comment associated with the punch if needed.
2. The employee must click an action button that defines the punch.
3. When the icon is clicked on the Web Punch screen, the employee will be directed to the TimeStar™ page they were previously located at.

How to Perform a Transfer Punch using the Web Punch:

To perform an organization level transfer punch using the TimeStar™ Web Punch an employee must follow the steps below:



1. The employee must enter their Username and Password.
2. The employee may enter a Comment associated with the transfer punch if necessary.
3. The employee must click the 'Transfer Orglevel' button.
4. The employee must select the organization levels they are transferring to by using the drop-down menus located on the screen.
5. The employee must click the 'Complete' button.

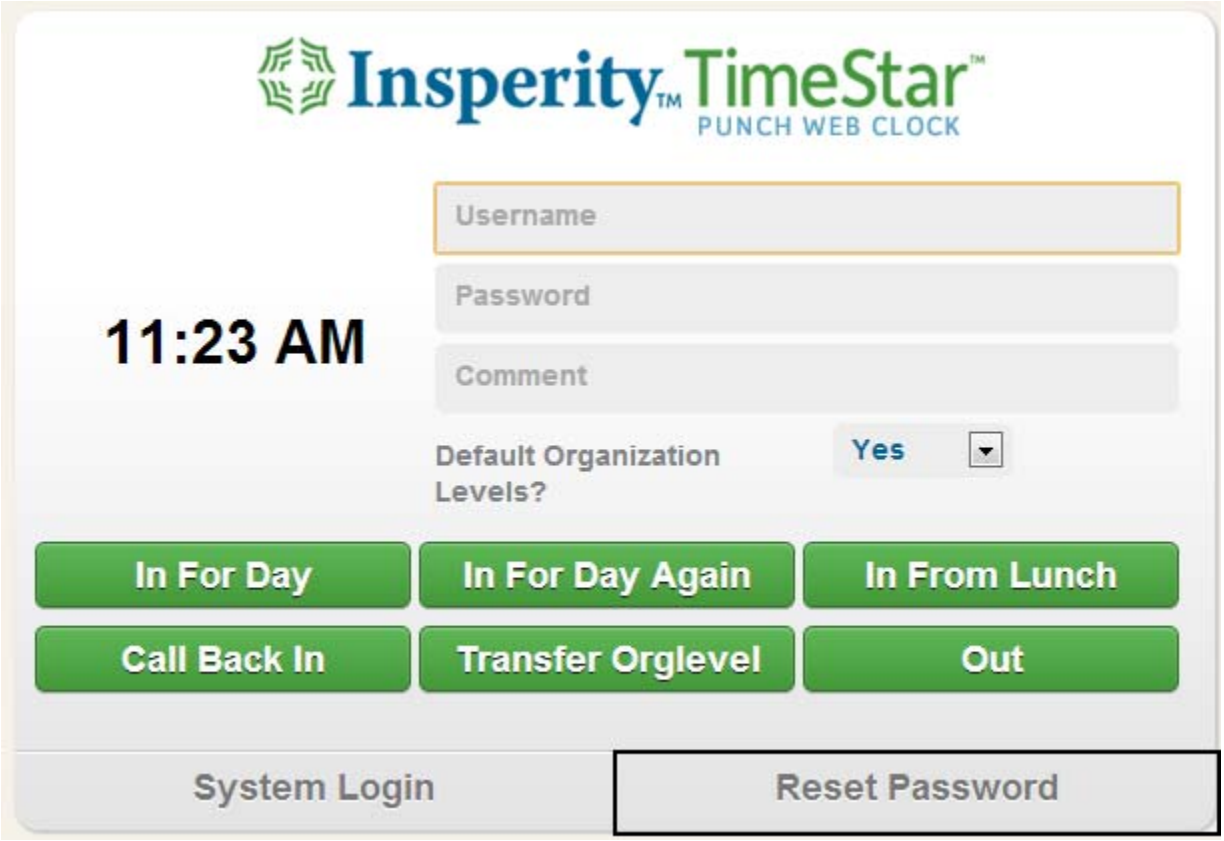
After clicking the 'Complete' button the Web Punch screen will display a green indicator line displaying the punch that was successfully added to the system.

If an employee must return to their home organization levels during their work day, they must perform the same transfer process and select their home organization levels.

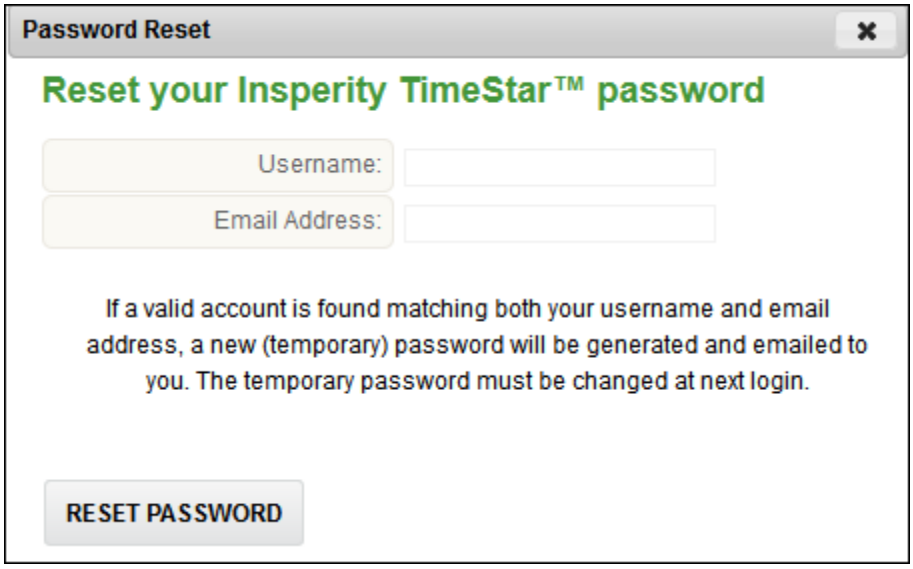
NOTE - It is not necessary for an employee to punch 'OUT' before performing an organization level transfer.

How to Reset Password via the Web Punch:

In the event the user has lost, forgotten or would like to change their password, they may click the 'Reset Password' link on the TimeStar™ Web Punch page.



In order for a user to have their TimeStar™ password reset, they must enter their username and email address that is on file within the TimeStar™ system for their user account. If the user does not have an e-mail address in the system, they will need to contact their TimeStar™ System Administrator.



After entering the information, the user must click the 'Reset Password' button. If the information entered matches the information within TimeStar™, a new password will be emailed to the address entered.

The next time the user logs into TimeStar™ with the generated password from the email, they will be required to change their password.

Daily Procedures:

- When selecting any of the Daily Procedures – Data Entry pages, the system automatically brings up the first employee in the system if this is your first time selecting an employee after logging in to TimeStar™. Otherwise, it will display the last employee you worked with at any point within the system.

- To locate an employee, use the employee toolbar on the top of the screen. See the TimeStar™ Navigation section, for more information on searching for employees.

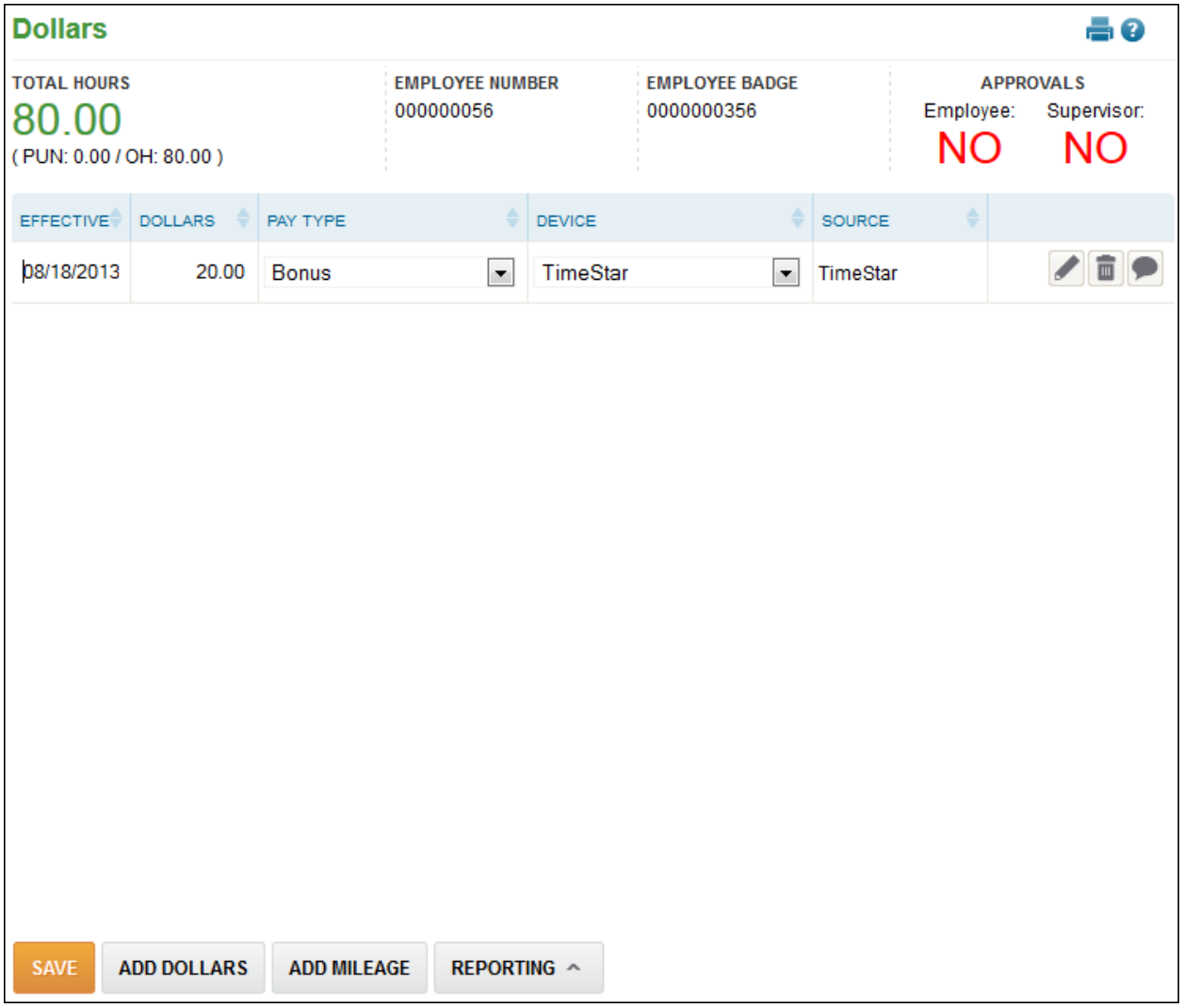
- When a date field is selected, a pop-up calendar will appear. The dates available for selection are determined by the security settings 'Allowable Range Outside of Current Period – Forward and Backward'.

- Clicking the print  icon a print preview of the page will display and the user will be able to print the information displayed in a report format.

- TimeStar™ has the ability to allow decimal hours entry, or hours and minutes entry. Contact your Insperity Time & Attendance consultant to update your system to display hours and minutes format.

Data Entry – Dollars:

The Dollars page can be utilized to enter dollar amounts within TimeStar™. The following fields appear on the page:



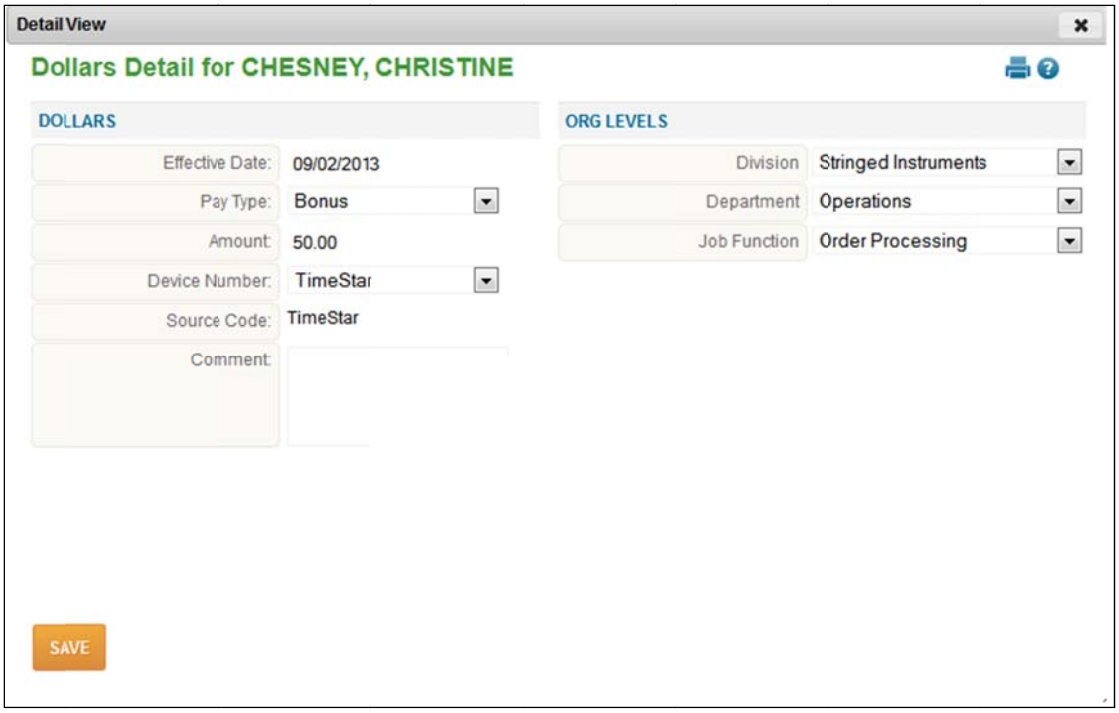
NOTE- If your company uses quick reports, click the 'Reporting' option and then click 'Dollars Report'. A new window will display the report.

Field Name	Description
Effective	The date that the dollars are effective.
Dollars	Number of dollars associated with the record.
Pay Type	Pay type that is applied to the Dollars record.
Device	Device Number.
Source	Source Code.
	Select this icon to edit any details of the Dollars record.
	Select this icon to delete the Dollars record.
	Select this icon to view the details of the audit log associated with the Dollars record.

	This is only available if the System Parameters – Audit Trail is set to Yes.

Adding/Editing/Viewing Dollars:

To add Dollars:



1. Click the 'Add Dollars' button.
2. Edit the 'Effective Date' to reflect the day to add Dollars.
3. Select a dollars pay type.
4. Enter the dollar amount.
5. Make any additional changes and click the 'Save' button.

Field Name	Description
Effective Date	The date that the dollars are effective.
Pay Type	Pay type to be applied to the dollars.
Amount	Number of dollars to grant the employee with the Dollars record.
Device Number	The device that the Dollars record originated from. When adding a Dollars record in TimeStar™, the device number will be TimeStar™.
Source Code	The Source Code defaults to a value of TimeStar™.
Comment	Enter any comment to have associated with the Dollars record.
Organization Level Drop-downs	Use these drop-downs to override the

	organization levels assigned.

To edit Dollars:

1. Click the icon to the right of the record to edit.
2. Edit any fields needed.
3. Enter comment.
4. Click 'Save'.

NOTE – Dollars records may also be edited on the main Dollars page without selecting the icon. You may also edit any of the fields that are shown on the main Dollars page and select 'Save' to apply any changes.

To delete Dollars:

1. Click the icon to the right of the record to delete.
2. You will receive a warning message - to delete, click 'OK', or to cancel, click 'Cancel'.

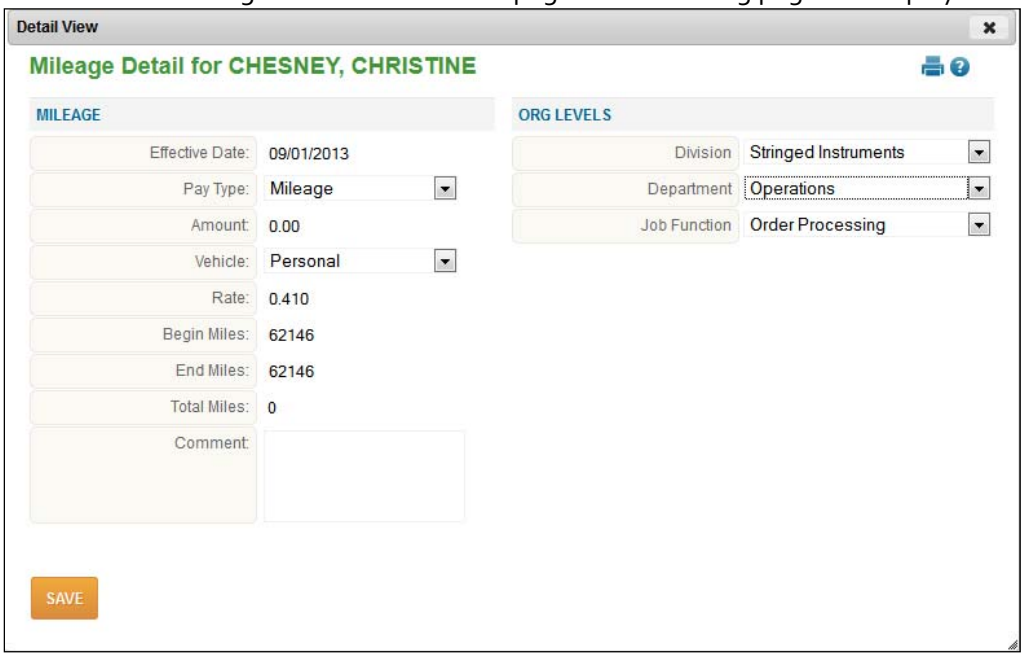
Mileage:

Mileage is one of Insperity Time and Attendance's additional optional modules for purchase.

Adding/Editing/Viewing Mileage Information:

To Add Mileage:

Click the 'Add Mileage' icon on the Dollars page. The following page will display:



Enter required information

- Effective date.
- Pay Type – only pay types with the dollar flag set to 'Yes' under System Setup – Reference Tables will be listed.
- Amount – calculation of the total miles multiplied by the rate – cannot be edited.
- Vehicle – if default vehicle is specified, the vehicle will be selected.
- Rate – may be edited if the employee is given the access right to do so.
- Begin – will default to one mile after the last entry made.
- End – will default to one mile after the last entry made.
- Total Miles – difference between begin and end mileage. This field may not be edited if the begin and end mileage fields are enabled.
- Comment.
- Organization level information may be changed.
- Click the 'Save' button.

To edit mileage:

- Click the  icon to the right of the record to edit.
- Edit any information.
- Click the 'Save' button.

To delete mileage:

- Click the  icon to the right of the record to delete.
- You will receive a warning message - if you want to delete, click 'OK'. If you want to cancel, click 'Cancel'.

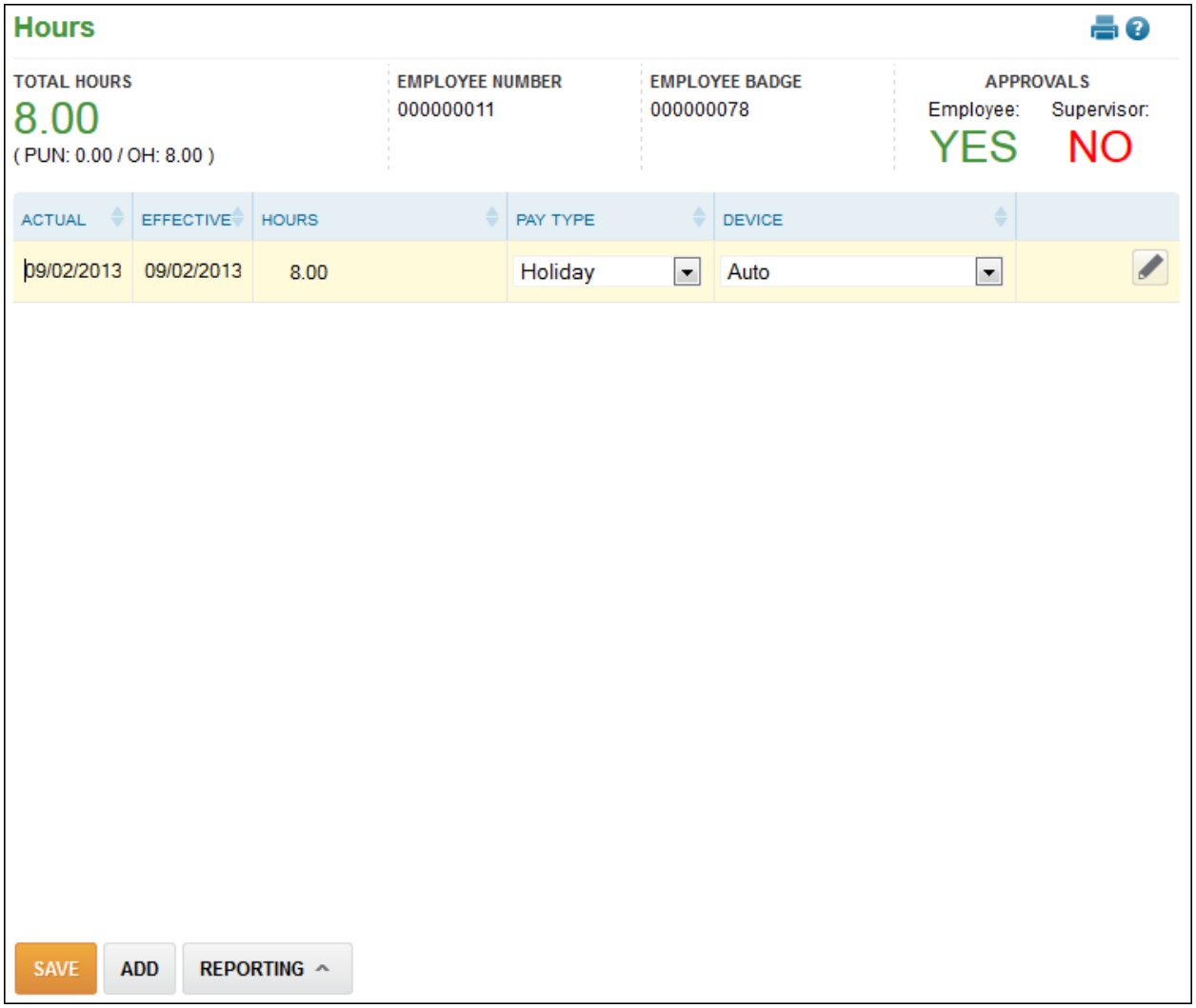
When the mileage option is available, the 'Add Mileage' button will be displayed next to the 'Add Dollars button'.

After mileage has been entered, the record will display on the Dollars panel with the dollar amount awarded.

NOTE – if the user is granted only view access to the Dollars panel, the 'Add Dollars' and 'Save' buttons will not be available.

Data Entry – Hours:

The Hours page can be utilized to enter a block of hours for an employee. Any auto-generated hours, such as salary records or holiday records will appear on this page.



NOTE- If your company uses Quick Reports, click the 'Reporting' option and then click 'Hours Report'. A new window will display the report.

Field Name	Description
Actual	Actual date the Hours were earned.
Effective	The date that the Hours are effective.
Hours	Number of Hours.
Pay Type	Pay type that is applied to the Hours record.
Device	Device number.
	Click this icon to edit any details of the Hours record.
	Click this icon to delete the Hours record.
	Click this icon to view the details of the audit log associated with this Hours record. This is only available if the System Parameters – Audit Trail is set to Yes.

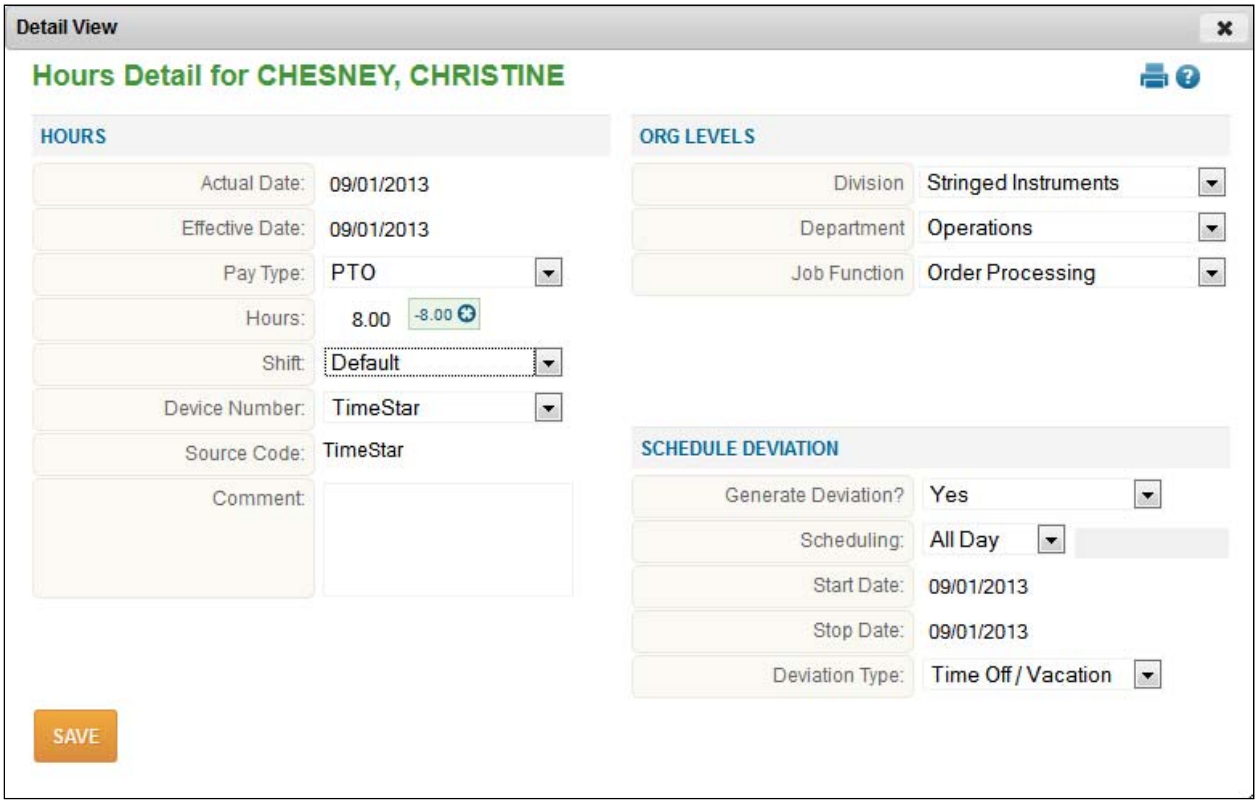
NOTE – The icon will not be available for selection on any auto-generated Hours records within TimeStar™ including but not limited to salary and holiday records.

To adjust hours for these records, edit the record or add hours of another pay type which will offset the number of hours for the auto-generated record.

Adding/Editing/Viewing Hours:

To add Hours:

- Click the 'Add' button.



The minimum requirements to add an Hours record in TimeStar™ are:

1. Edit the 'Actual Date' to reflect the day to add hours.
2. Use the 'Pay Type' drop-down to select the pay type.
3. Enter number of decimal hours or hours and minutes.
4. Make any additional changes to fields and click the 'Save' button.

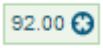
Field Name	Description
Actual Date	Actual date the hours were earned.
Effective Date	The date that the hours are effective.
Pay Type	Pay type to be applied to the hours.
Shift	Use the drop-down to override the shift code awarded with the Hours record.
Device Number	The device that the Hours record originated

	from. When adding an Hours record in TimeStar™, the device number will be TimeStar™.
Source Code	The Source Code defaults to TimeStar™.
Comment	Enter any comment to have associated with the Hours record.
Hours	Number of hours to grant the employee with the Hours record.
Hours/Minutes (if format turned on)	Number of hours and minutes to grant the employee. NOTE – Minutes cannot be entered for a value greater than 59.
Organization Level drop-down menus	Use these drop-down menus to override the organization levels assigned.
Schedule Deviation	If your company has the parameter 'Auto generate other hours and schedule deviations' set to True, this option will appear. Select 'Yes' to generate a deviation and specify the times of the deviation if applicable.

To edit Hours:

1. Click the  icon to the right of the record to be edited.
2. Edit any information.
3. Enter comment, if applicable.
4. Click 'Save'.

NOTE – Hours records may also be edited on the main Hours page without selecting the  icon. You may also edit any of the fields that are shown on the main Hours page and click 'Save' to apply any changes.

NOTE –If your system has accruals setup that are linked to a specific pay type and the pay type is selected on the hours page, a balance icon will show 

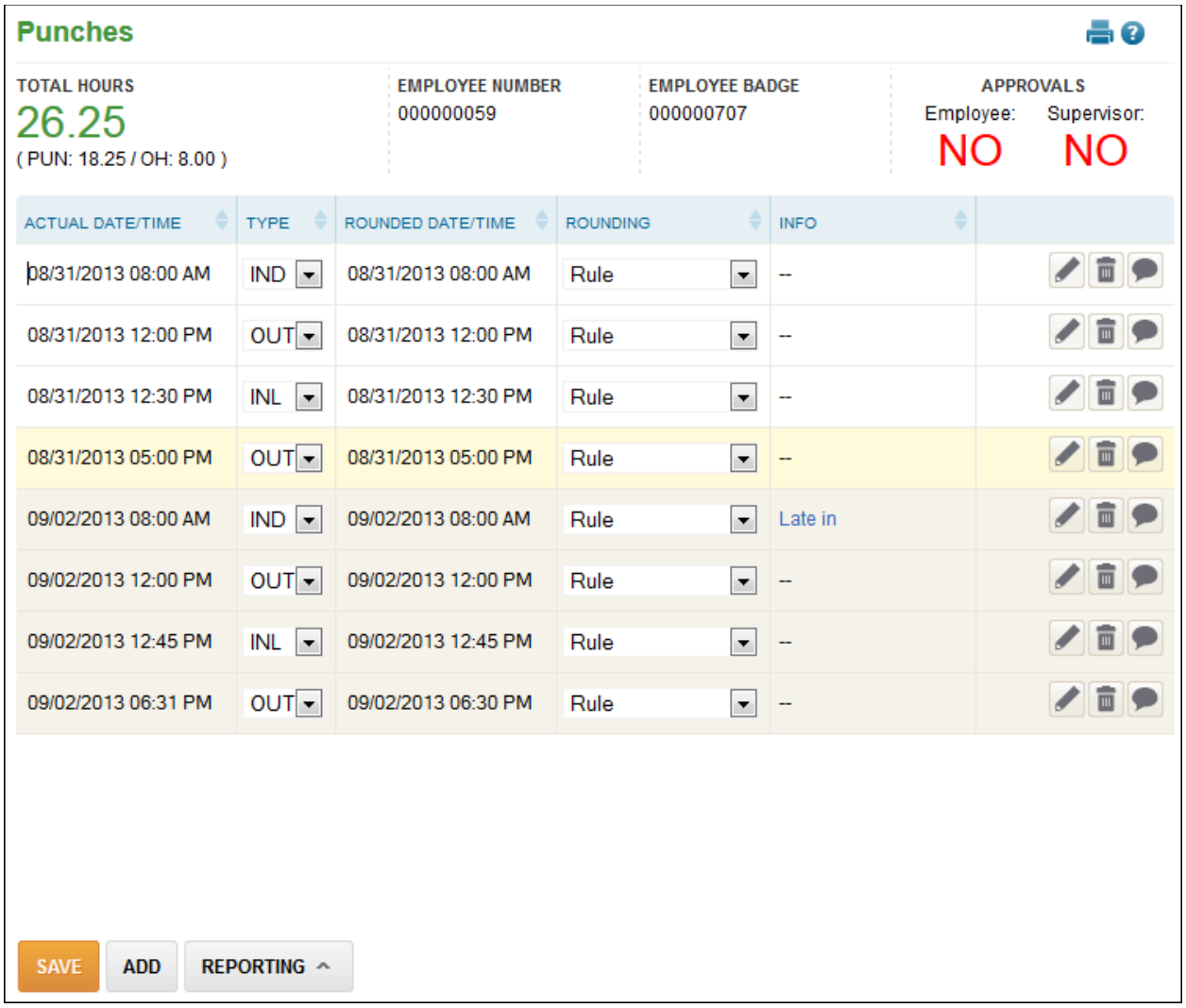
. Scrolling over this balance will show the accrual plan the pay type is linked to, and both committed and running balances. The committed and running values displayed can be configured by the following options: the balance as of the end of the current accrual plan year, end of last closed pay period or first requested effective date. Please contact Insperity Time and Attendance if changes in setup need to be made.

To delete Hours:

1. Click the  icon to the right of the record.
2. You will receive a warning message. To delete, click 'OK'. To cancel, click 'Cancel'.

Data Entry – Punches:

The punches page displays punch information coming from time clocks or web punching.



NOTE- If your company uses Quick Reports, click the 'Reporting' option and then click 'Punches Report'. A new window will display the report.

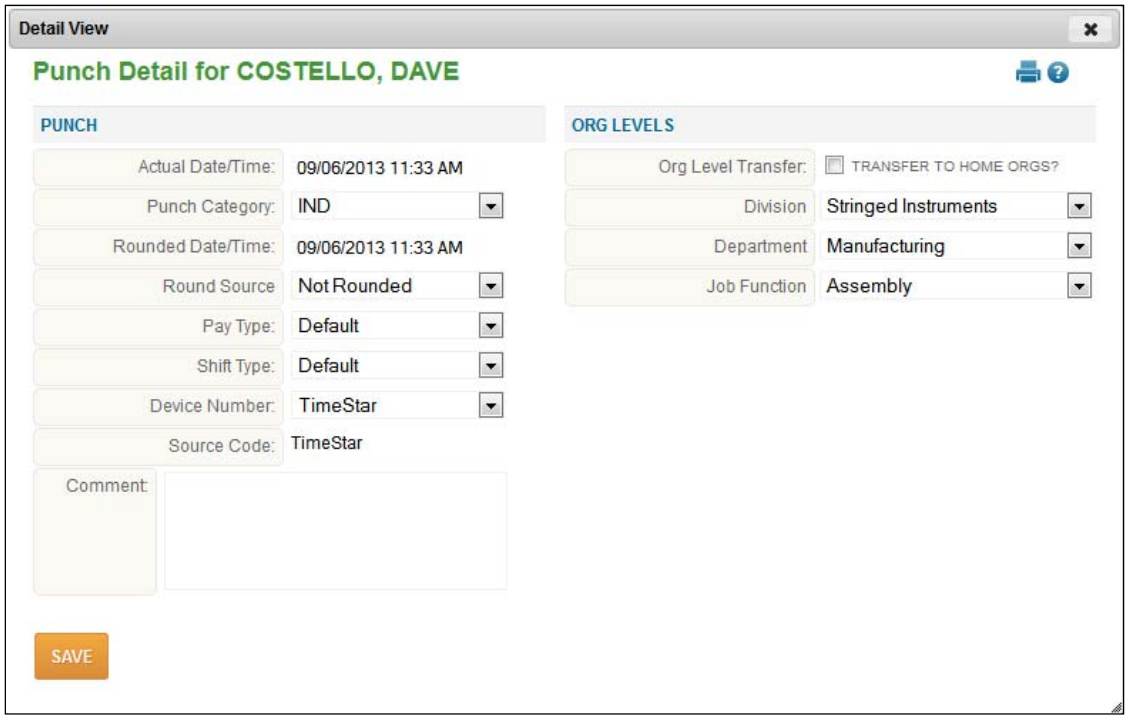
Field Name	Description
Actual Date/Time	Actual date & time the employee punched IN or OUT.
Type	The type of punch IND – In for Day INL – In from Lunch INB – In from Break IDA – In for Day Again INS – In from Split TXO – Transfer punch ALO – Auto lunch override CAL – On Call CBI – Call Back In

	OUT – Any Out punch
Round Date/Time	Displays the rounded date and time of the punch based on your company's rules. NOTE- Employees are paid from the dates and times in the round date/time field.
Rounding	Type of rounding that is in effect for the punch. Combine – a TXO and IND punch were combined (the IND rounding rules apply). None – No rounding rules are affecting the punch. O/R Effective Date – The effective date for the punch was overridden. O/R Org Levels – org levels were changed from the employees home assignments. O/R Time – The rounded date/time was manually entered overriding the rounding rules. Override – The round date/time was manually overridden. Rule – The punch is rounding based on the rounding rules. Schedule – The punch is rounding to the employee's schedule IN or OUT time.
Info	If the punch is a missing punch, 'Missing Punch' will display in the 'Info' column. If the punch has a comment associated with it, a notation 'Comment' will display in the 'Info' column. If an attendance transaction exists for the punch, the type of transaction will display, for example 'Late Out.'. Clicking on this message will take the user to attendance record detail.
	Click this icon to edit any details of the punch.
	Click this icon to delete the punch.
	Click this icon to view the details of the audit log associated with this punch. This is available if the System Parameters – Audit Trail is set to Yes.

Adding /Editing/Viewing Punches:

To add a punch:

- Click the 'Add' button. The following window displays:



The minimum requirements to add a punch in TimeStar™ are below:

1. Edit the Actual Date/Time.
2. Use the 'Punch Category' drop-down to select the punch type.
3. Make any additional changes to fields and click the 'Save' button.

Field Name	Description
Actual Date/Time	Actual date & time the employee punched IN or OUT.
Punch Category	The type of punch.
Round Date/Time	The rounded date and time of the punch based on your company's rules.
Rounding Source	Rounding that is in effect for the punch.
Pay Type	Use the drop-down to override the pay type that will be associated with the punched time.
Shift	Use the drop-down to override the shift code that will be associated with the punched time.
Device Number	The device that the punch originated from. When adding a punch in TimeStar™, the device number will be TimeStar™.
Source Code	The Source Type defaults to TimeStar™.
Comment	Enter any comment to have associated with

	the punch.
Org Level Transfer	Select the checkbox to force home organization levels for the punches even if the organization levels are changed on the punch.
Organization Level drop-downs	Use these drop-downs to override the organization levels assigned to the punched time.

To edit a punch:

1. Click the  icon to the right of the punch to be edited.
2. Edit any of the fields.
3. Click the 'Save' button.

Correcting a missing punch:

1. Click the  icon to the right of the punch to be edited.
2. Correct the actual date/time and punch type.
3. Click the 'Save' button.

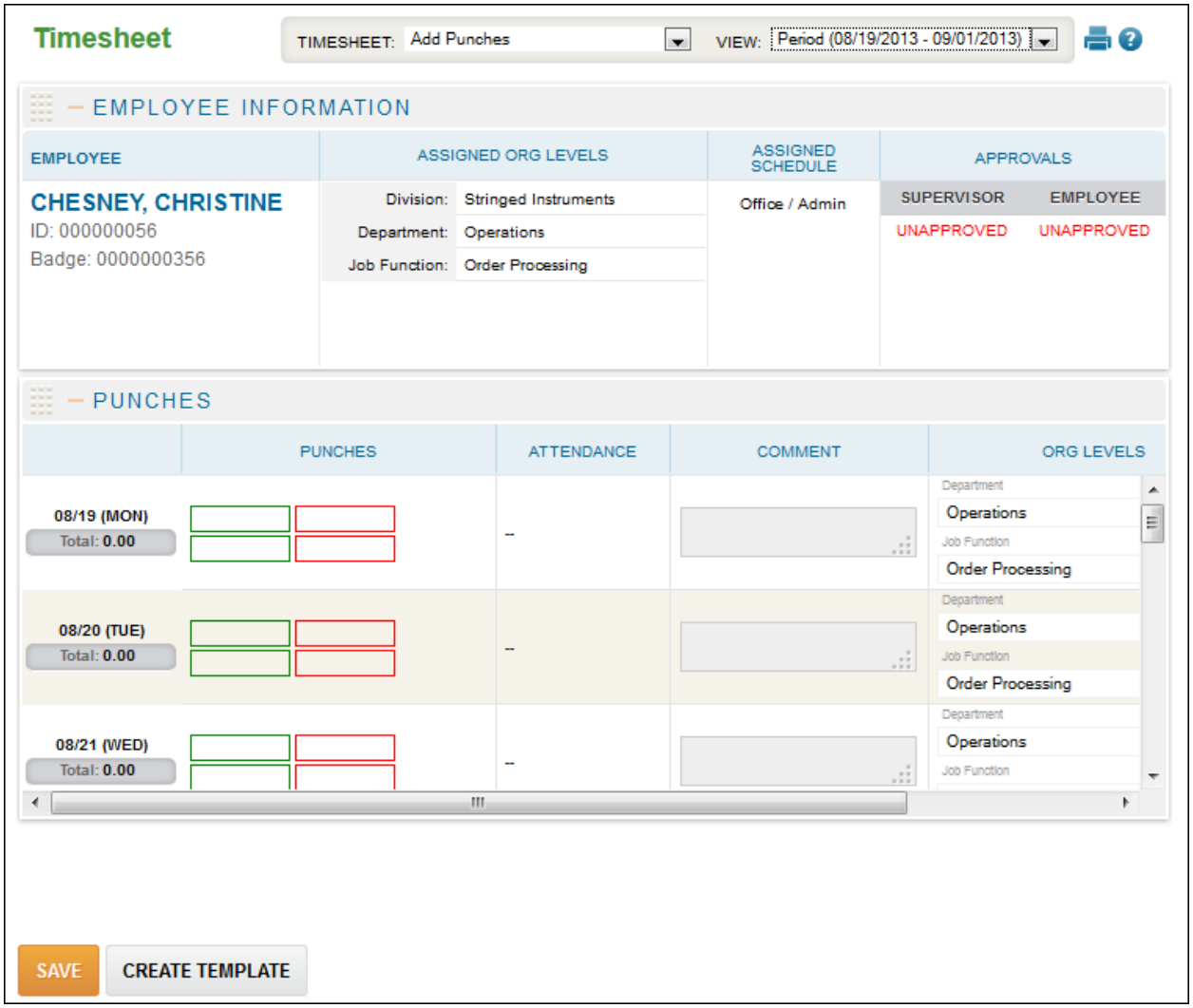
NOTE – Any information that displays on the Punches page may also be edited on the main Punches page without selecting the  icon. If correcting a missing punch, simply highlight the actual date/time and enter the correct actual/date time and use the drop-down for the punch type and click 'Save'. You may also edit the rounded time/date or rounding on the Punches page.

To delete a punch:

1. Click the  icon to the right of the punch to be deleted.
2. You will receive a warning message: 'You are about to permanently delete this punch record. This action can NOT be undone! Continue?' To delete, click 'OK'. To cancel, click 'Cancel'.

Data Entry – Timesheet:

The Timesheet page can be setup to display an employee's punches, hours, dollars, mileage, and/or units. Timesheet is configured via the Company Setup – Timesheet Setup page. Saved Timesheets can be applied to groups of employees from the Company Setup - Pay Groups – Timesheet tab. Below is an example of a Timesheet configuration:

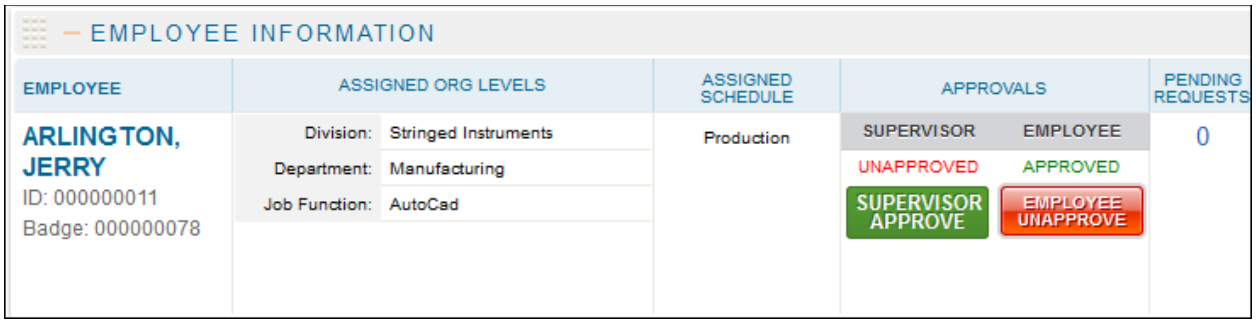


Adding/Editing/Deleting Data via Timesheet:

Please note that the following steps may vary depending on your company's setup.



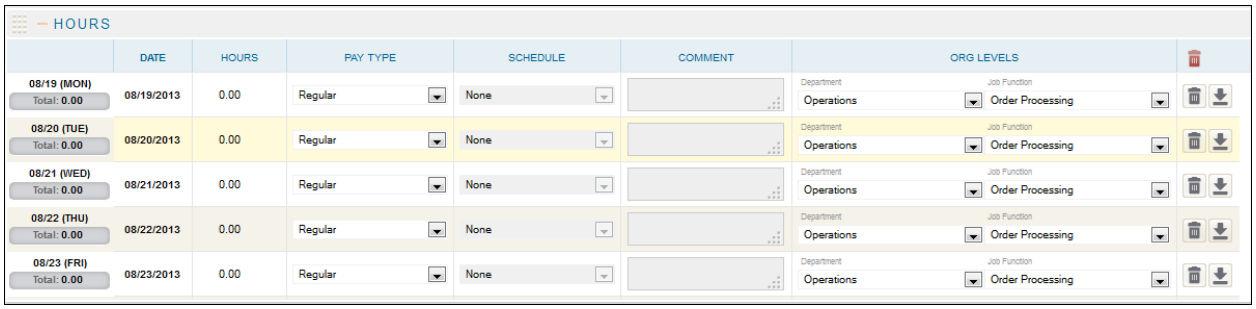
After clicking Data Entry – Timesheet, a drop-down list for available Timesheets appears along with a View drop-down to choose the period or specific weeks to display. The initial view for this screen is for the entire pay period for the employee selected. You may use the drop-down on the top of the screen to select a different employee or pay period.



Employee Information found on this page includes employee name, ID, badge, home organization levels, assigned schedule group, current approval status, and pending requests. If configured, supervisors will be able to approve employees' time via the Timesheet page by selecting the Employee Information tab and clicking 'Supervisor Approve' button.

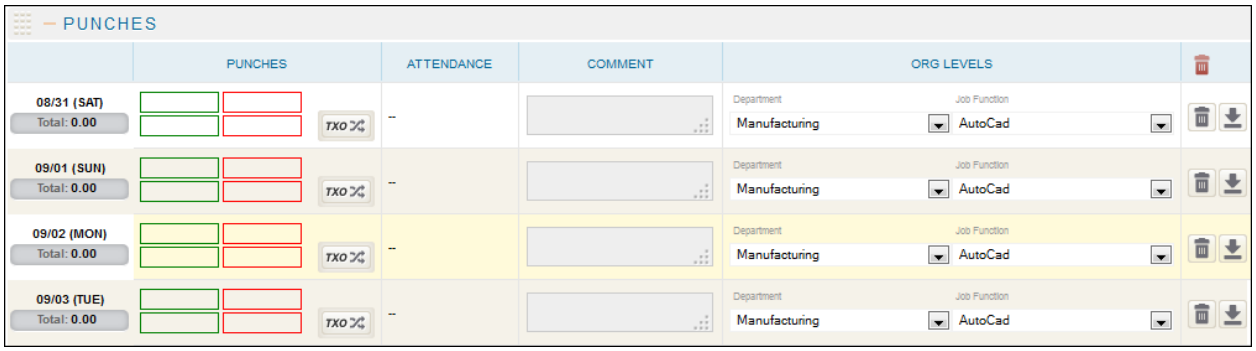
Each data type will display in a separate section. The sections can be selected and dragged to change the order they appear on the page. Click the icon to the left of the name to drag the section up or down. They can also be expanded or collapsed to allow for more visibility.

To add hours, follow these steps:



1. Select the Date to add a record for.
2. Enter the number of hours to the Hours column.
3. Use the 'Pay Type' drop-down and change the pay type.
4. Use the Schedule drop-down and select 'Day Off' to assign a time off schedule deviation for the entire day if applicable.
5. Enter a comment if applicable.
6. Use the drop-downs to select any organization level overrides if applicable.
7. If necessary, you may add another line to a day by clicking the icon on the right side of the screen. This will enable you to enter additional hours records.
8. Click 'Save' to save records.
9. A green message stating "Timesheet Saved" will appear. If there is any invalid or missing data it will appear in red.

To add punches, follow these steps:



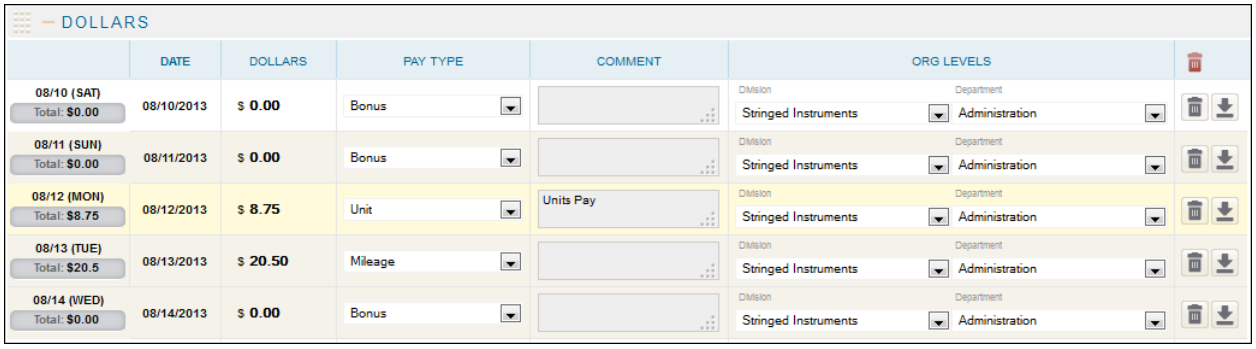
1. Select the Date to add punches for.
2. Enter times in the green and red outlined fields.
    a. If the 'Allow Transfer' setting is applied, click the  icon to enter a transfer punch.

NOTE– You do not need to complete all fields on a line. For example, if an employee did not punch out for lunch, you may complete the IND and OUT items for that line.

3. Use the 'Shift Type' to select a shift if applicable.
4. Use the drop-downs to select any organization level overrides if applicable.
5. You may add another line to a day by clicking the  icon on the right side of the screen. This will enable you to enter additional punches if needed.
6. The total for the day will appear below the date.
7. Click 'Save' to save records.
8. A green message stating "Timesheet Saved" will appear.If there is any invalid or missing data it will appear in red.

NOTE – If the 'Require Valid Punch Pairs' setting is set to 'Yes', a valid IN/OUT combination will need to be entered before saving the Timesheet.

To add dollars, follow these steps:

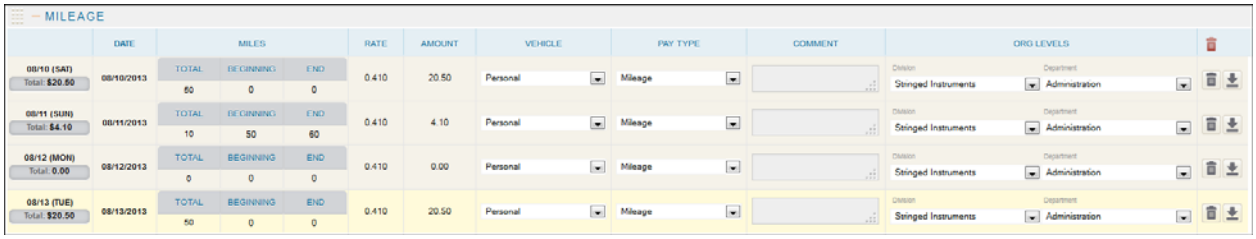


1. Select the Date to add dollars for.

2. Enter amount in Dollars field
3. Enter pay type.
4. Enter a comment if applicable.
5. Use the drop-downs to select any organization level overrides if applicable.
6. You may add another line to a day by clicking the icon on the right side of the screen. This will enable you to enter additional punches if needed.
7. Click 'Save' to save records.
8. A green message stating "Timesheet Saved" will appear.If there is any invalid or missing data it will appear in red.

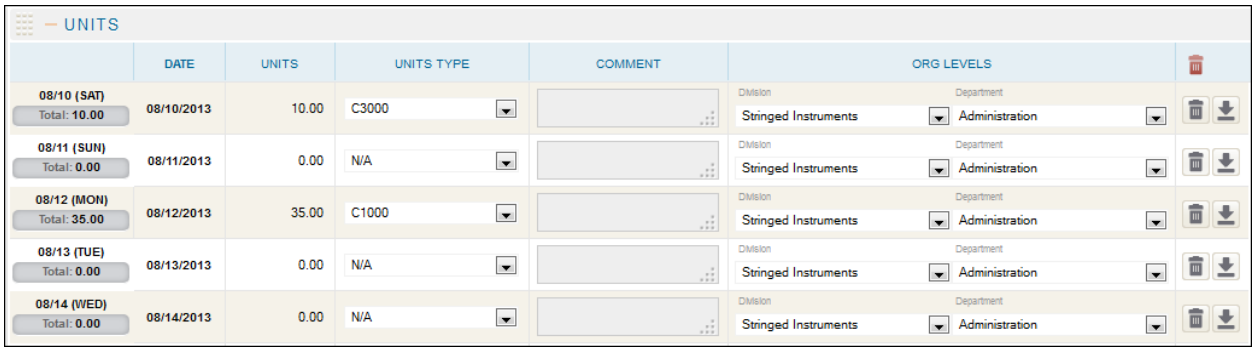
NOTE – Fields to enter will vary with individual Timesheet Setup configurations.

To add mileage, follow these steps:



1. Select the Date to add mileage for.
2. Enter values Begin and End Miles fields. Totals will automatically be updated based on these values.
3. Select the Vehicle.
4. Select the pay type.
5. Enter a comment if applicable.
6. Use the drop-downs to select any organization level overrides if applicable.
7. You may add another line to a day by clicking the icon on the right side of the screen. This will enable you to enter additional punches if needed.
8. Click 'Save' to save records.
9. A green message stating "Timesheet Saved" will appear.If there is any invalid or missing data it will appear in red.

To add units, follow these steps:



1. Select the Date to add units for.
2. Enter amount in Units field.
3. Enter units type.
4. Enter a comment if applicable.
5. Use the drop-downs to select any organization level overrides if applicable.
6. You may add another line to a day by clicking the icon on the right side of the screen. This will enable you to enter additional punches if needed.
7. Click 'Save' to save records.
8. A green message stating "Timesheet Saved" will appear.If there is any invalid or missing data it will appear in red.

To edit existing records to any of the sections, follow the steps below:

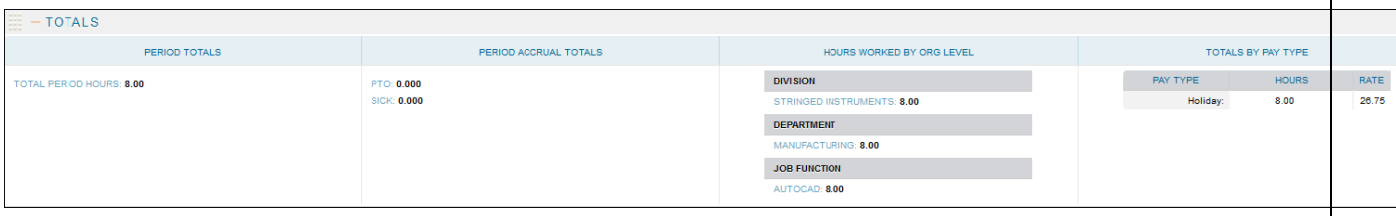
1. Update the appropriate section with the changes.
2. Click 'Save'.
3. A green message stating "Timesheet Saved" will appear.If there is any invalid or missing data it will appear in red.

NOTE – Not all setups will display existing records.

To delete records via Timesheet, follow the steps below:

1. Click the button to delete the record.
2. Click 'Save'
3. A green message stating "Timesheet Saved" will appear.

The Totals section will display with options chosen on the Timesheet Setup page. The following are options available to be displayed from this section, period totals, period accrual totals, hours worked by org level, and totals by pay type.



Follow these steps to create and apply a timesheet template:

1. Click the 'Create Template' button.
2. Enter information to save as a template to reuse.
3. Click 'Save Template' button.
4. Message appears that "Timesheet Template successfully saved".
5. Click 'Back to Timesheet' button to return to timesheet page.

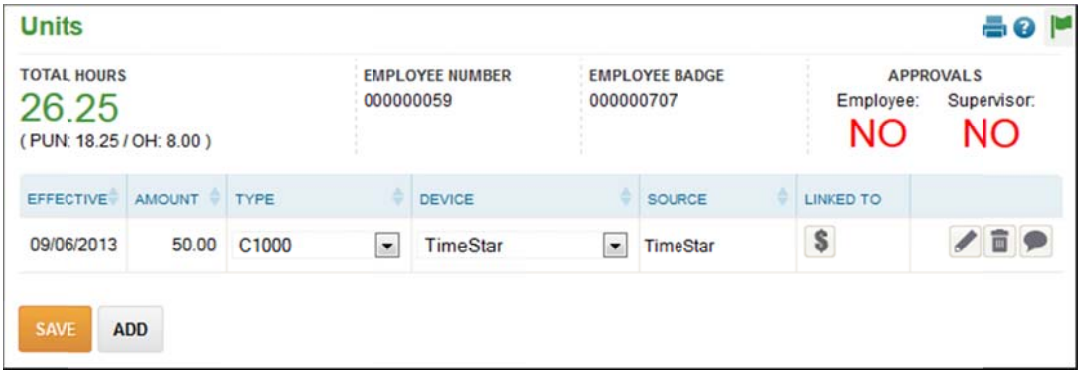
NOTE – If you made changes on the template screen without saving, a message will state "Your changes have not been saved. Press OK to continue without saving those changes." Click 'Cancel' to return to the template screen.

6. Click 'Use Template' to apply the template created.
7. To save the Timesheet click 'Save'.
8. To go back and edit the template click 'Edit Template'.

NOTE – Templates will only be saved for the specific employee it was created for.

Data Entry – Units:

The Units page can be utilized to enter Units records within TimeStar™.



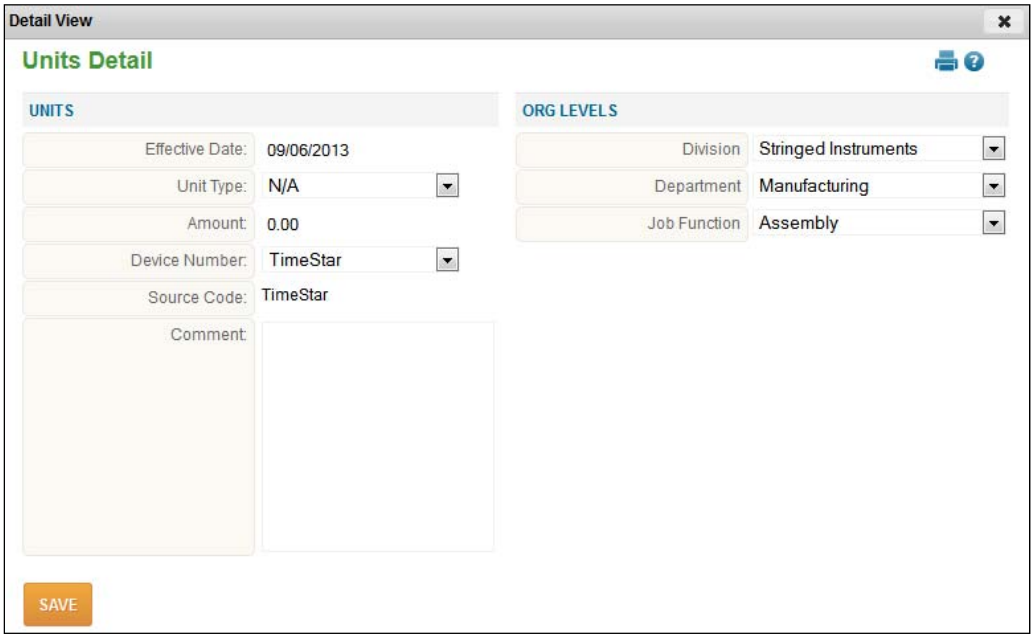
Field Name	Description
Effective	The date that the units are effective.
Amount	Number of units associated with the record.
Type	Units type that are applied to the units record.
Device	Device Number.
Source	Source Code.
Linked To	Hours or Dollars record the units record is linked to. If no record is linked, N/A will display.
	Select this icon to edit any details of the

	Dollars record.
	Select this icon to delete the Dollars record.
	Select this icon to view the details of the audit log associated with this Dollars record. This is only available if the System Parameters – Audit Trail is set to Yes.

Adding/Editing/Viewing Units:

To add units:

1. Click the 'Add' button.



2. Edit the 'Effective Date' to reflect the day to add units.
3. Select the 'Unit Type'.
4. Enter the unit amount.
5. Make any additional changes and click the 'Save' button.

Field Name	Description
Effective Date	The date that the units are effective.
Unit Type	Unit type to be applied to the record.
Amount	Number of units.
Shift	Shift type for the Units record.
Device Number	The device that the Units record originated from. When adding a Units record in TimeStar™, the device number will be TimeStar™.
Source Code	The Source Code defaults to TimeStar™.

Comment	Enter any comment to have associated with the Units record.
Organization Level drop-downs	Use these drop-downs to override the organization levels assigned.

To edit units:

1. Click the  icon to the right of the record to edit.
2. Edit any information.
3. Enter a comment if applicable.
4. Click the 'Save' button.

NOTE – If a Dollars or Hours record is linked to the Units record, the linked record is also updated.

NOTE – Units records may also be edited on the main Units page without selecting the  icon. You may also edit any of the fields that are shown on the main Units page and select 'Save' to apply any changes.

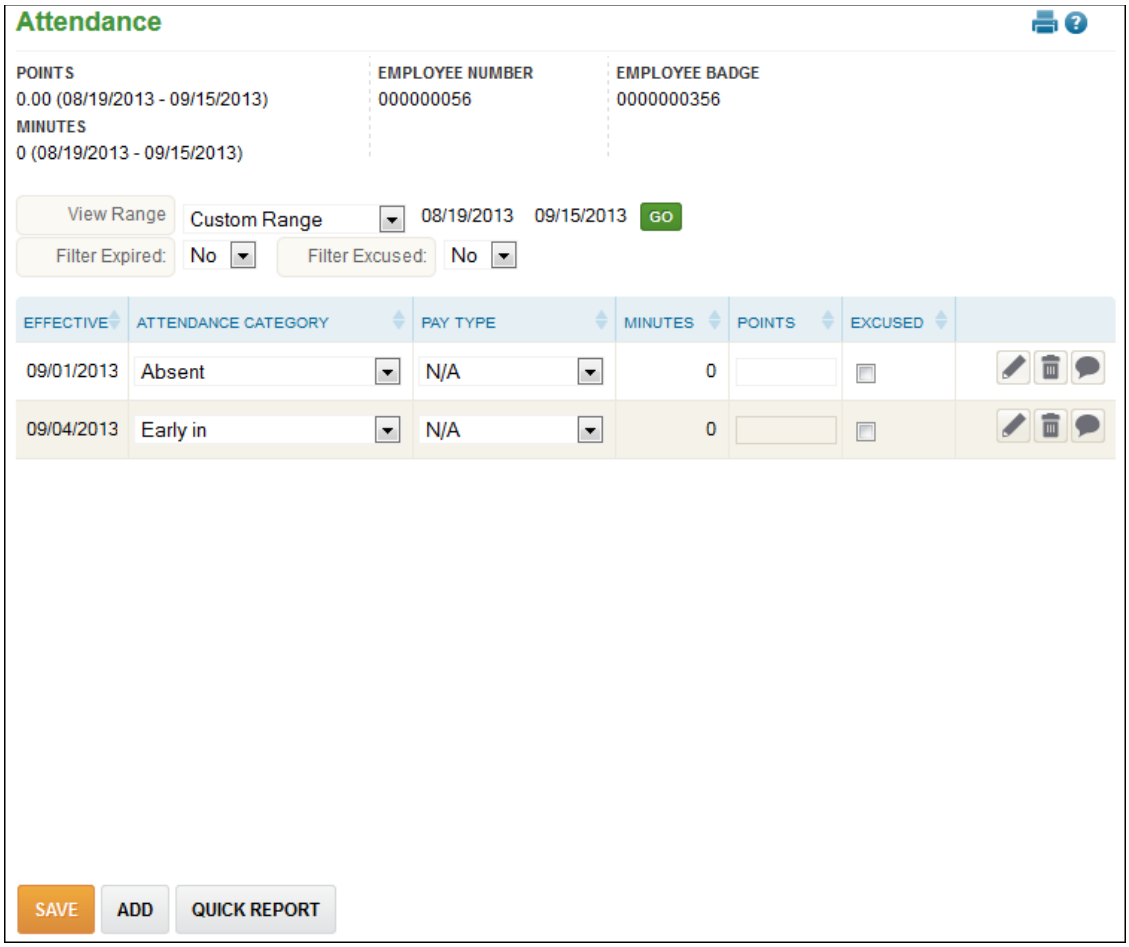
To delete units:

1. Click the  icon to the right of the record to delete.
2. You will receive a warning message - To delete, click 'OK', or to cancel, click 'Cancel'.

NOTE – If a Dollars or Hours record was linked to the units record, the linked record is also deleted with this process.

Exceptions – Attendance:

The Attendance page holds your company's attendance information. Certain pay types entered on the Hours page can be saved here such as vacation, sick, or personal. Also, attendance data can be generated from alerts such as early outs, tardies and absences.



Attendance records can be saved to this page and points can be associated with each instance if your company has a Points policy.

- Any user given 'edit' access to the attendance panel may adjust points associated with attendance transactions.
- Points warnings can also be configured to alert supervisors when an employee has reached the defined points threshold(s).
- In addition to the ability to generate points, TimeStar™ can also be configured to automatically generate award points.
- Award points would be given to an employee if the employee did not have any point transactions in the number of days defined.
- A point cap can also be defined so employees who do not have points are not given award points.

Adding/Editing/Viewing Attendance records:

- The Attendance page holds any attendance incidents as well as Hours records to track for attendance purposes.
- The 'Excused' checkbox may be used to excuse an attendance transaction.

NOTE – The 'Points' value must still be set to 0.00 manually after the 'Excused' checkbox is selected for the transaction to be disregarded for points awards.

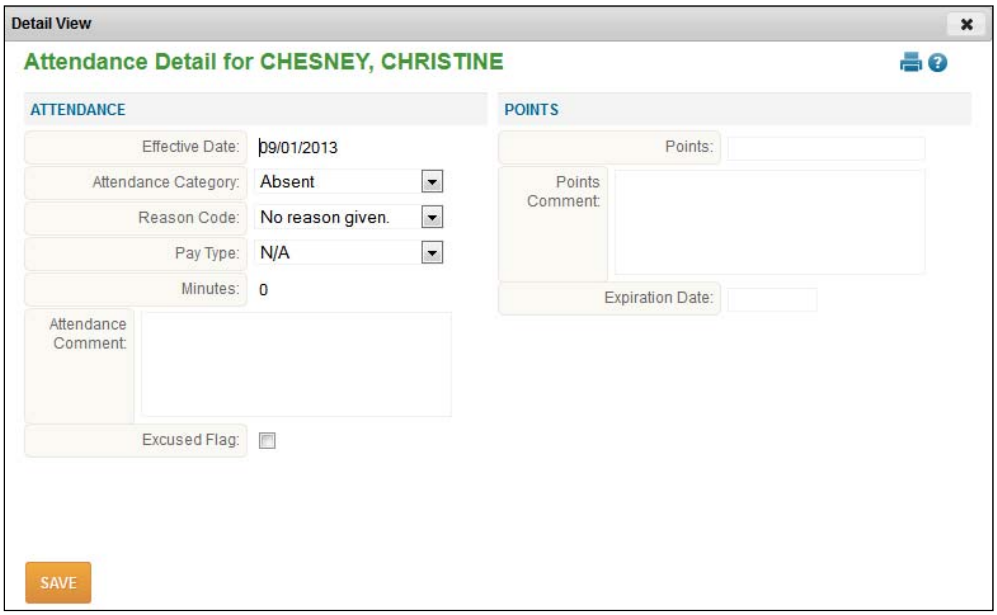
The 'Filter Expired' option may be used to hide records that have points values that have expired before the end date of the date range you are currently viewing.
NOTE – This filter will not remove transactions if the View Range is set to 'All Attendance History'.

The 'Filter Excused' option will remove any excused transactions from the view.

To add an attendance record:

Select the Attendance page from Daily Procedures – Exceptions - Attendance:

1. Click the 'Add' button. The following window displays:



2. Enter 'Effective Date'.
3. Use drop-down to select Attendance Category.
4. Use drop-down to select Reason Code (if applicable).
5. Use drop-down to select Pay Type (if applicable).
6. Enter 'Minutes'.
7. Enter an Attendance Comment (if applicable).
8. Check the 'Excused Flag' check box (if applicable)
9. Enter Points (if applicable).
10. Enter a Points Comment (if applicable).
11. Enter Expiration Date for the points (if applicable).
12. Click the 'Save' button.

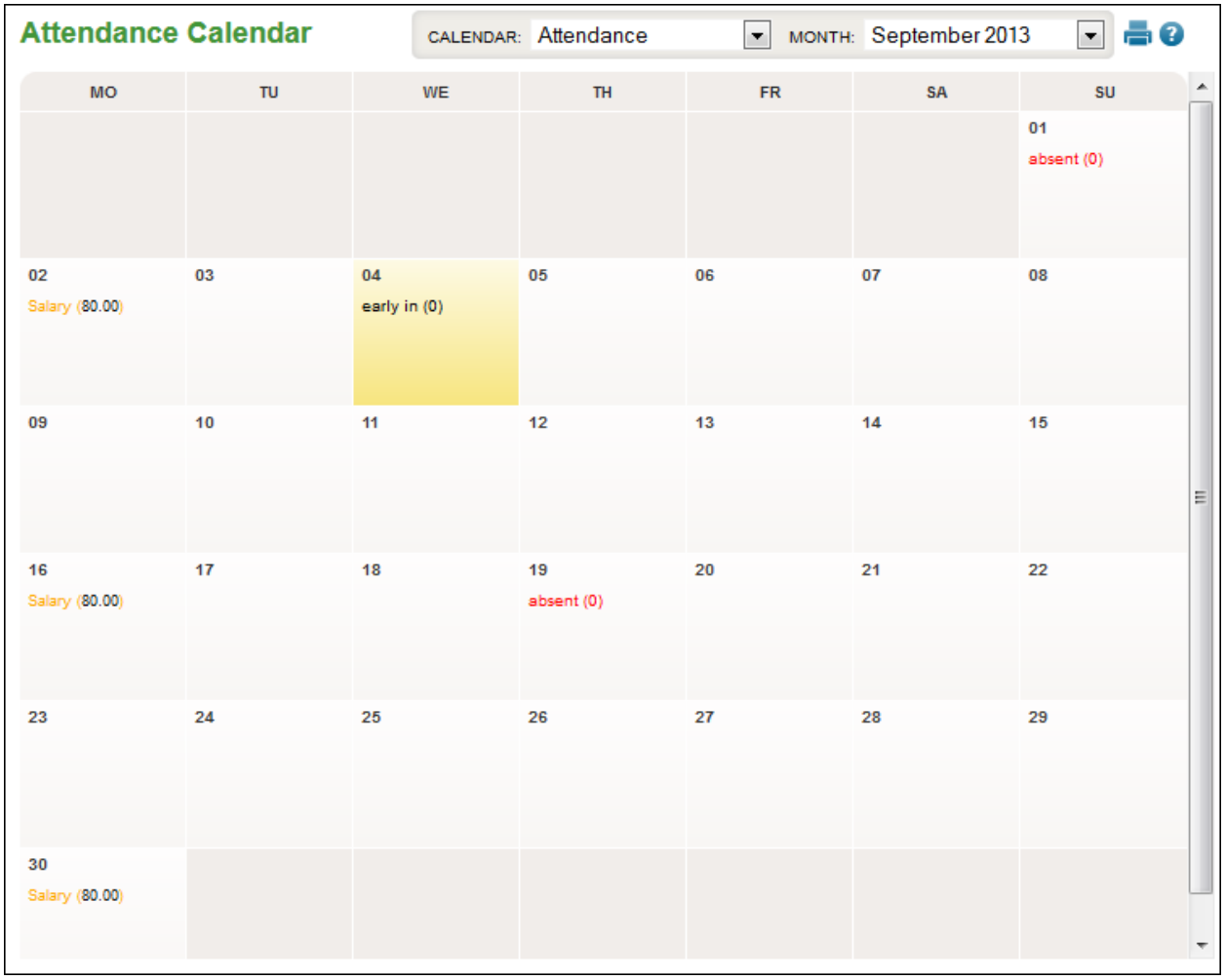
To edit an attendance record:

1. Click the icon to the right of the record to be edited.
2. Edit the fields you would like changed.
3. Click the 'Save' button.

To delete an attendance record:

1. Click the icon to the right of the record to be deleted.
2. You will receive this warning message – 'You are about to permanently delete this attendance record. This action can NOT be undone! Continue?' Click 'Ok' to delete the record, click 'Cancel' to keep the record and close the message.

Exceptions - Attendance Calendar:



The Attendance Calendar provides a calendar view of attendance transactions and/or Hours records for a single employee. This calendar is configurable under Company Setup – Calendar Setup – Attendance Calendar Setup.

NOTE – If your system is setup with hours and minutes instead of decimal hours, the coverage view will display with those values.

Requests:

Insperity TimeStar™ has integrated a request module to minimize data entry by supervisors and administrative personnel. You may also use this process to replace a manual paper tracking system for time off.

Employees may submit requests within TimeStar™. After the employee completes the request, a supervisor will receive a notification that a request has been submitted.

Supervisors may then approve or deny the request. At the time the request is approved or denied, a supervisor may enter comments or edit any data entered by the employee.

After the supervisor has replied to the request, the employee receives a notification detailing the supervisor's response.

Submitting a Request:

After an employee's request has been made, a notification will appear on the request icon for the employee's supervisor.

There are five types of requests that can be submitted:

- Time Off: Time that will be added to an employee's hours for a pay period (Examples are vacation, sick, bereavement)
- Schedule Change: Change to scheduled hours
- General Request: Send a message to a supervisor
- Missing Punch (optional): Fix an inaccurate punch or missed punch
- TimeStar™ Message (optional): Send a message to any user in TimeStar™

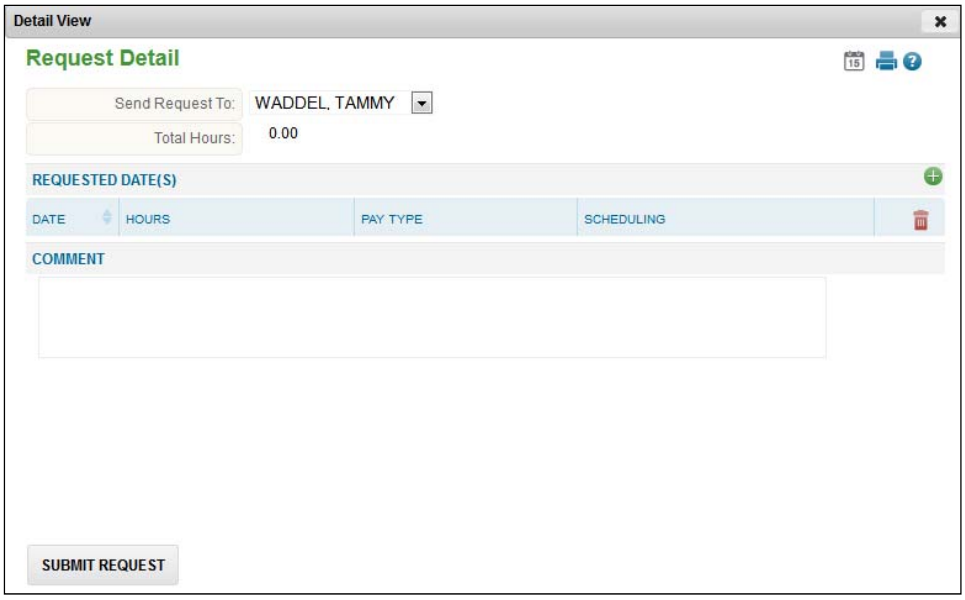
NOTE – Users who have access to the My Request Widget will be able to view and submit requests via the Widget. Please see the Widget section for more details.

Submitting a Time Off Request:

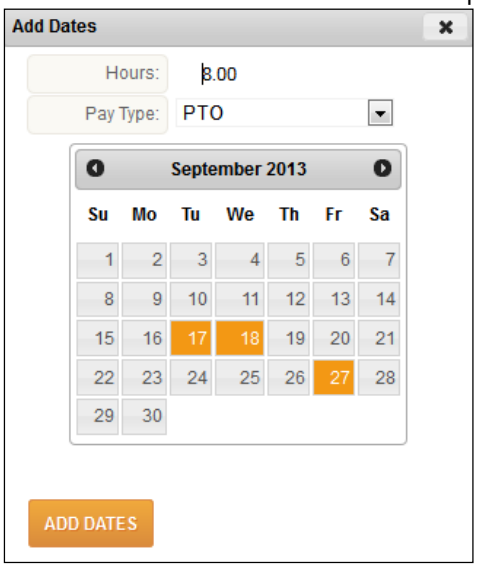
To submit a Time Off Request, follow these steps:

1. Login to TimeStar™.
2. Click the Requests icon 

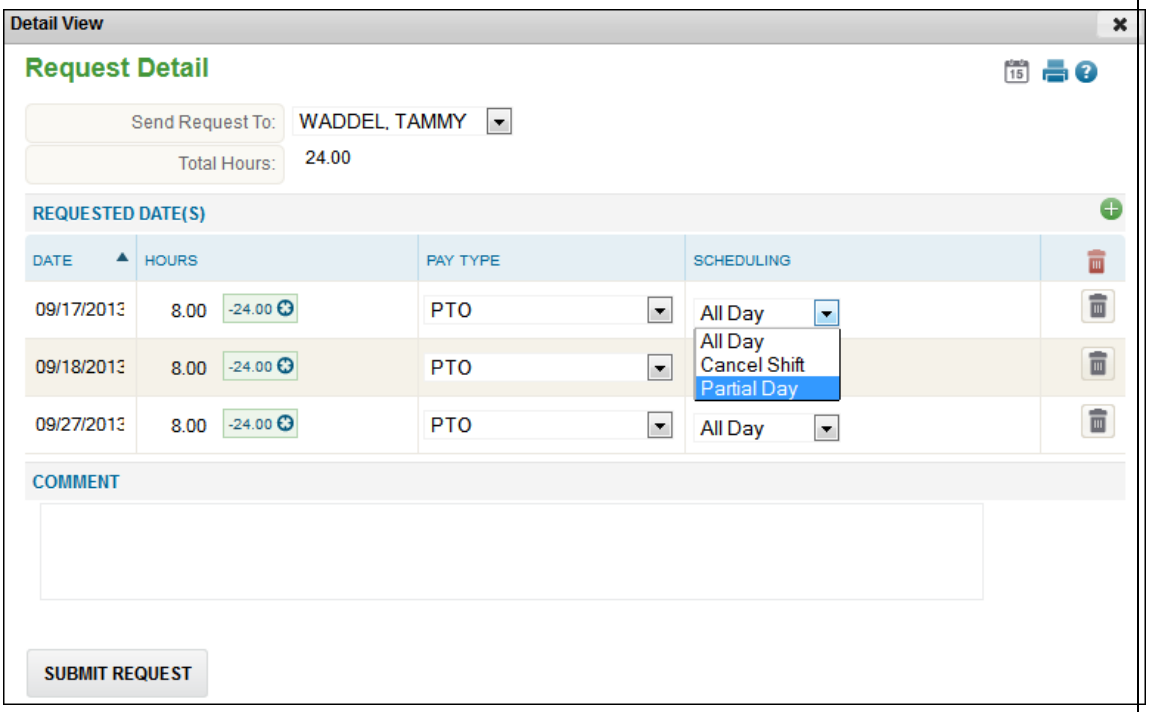
, or click Daily Procedures - Requests on the TimeStar™ menu.
3. Click the 'New Request' button. The menu will open upwards and display additional options.
4. Click 'Time Off Request'. The following window displays:



5. When submitting or approving a request, if a user has access to the Daily Procedures – Schedules - Time Off Calendar page, the 15 icon will appear on the detail screen so the Time Off Calendar may be accessed when reviewing or entering a request.
6. Use the 'Send Request To' drop-down to select which supervisor to send your request to.
7. Click the + icon to open a calendar. The calendar window displays:



   a. Add daily hours information.
   b. Select Pay Type option.
   c. Click and drag to select days (Selected dates will appear in orange).
   d. Hold 'Ctrl' to add additional days from other weeks or months.
   e. Click 'Add Dates' button to add the selected dates to the request screen. The following Request Detail will display:



f. Only one entry per pay type per day is allowed.
g. Click the close 'X' to cancel and return to the Requests page.

8. Select the 'Pay Type' for each day and modify hours, if needed.
9. To take a partial day, select 'Partial Day' from the 'Scheduling' drop-down list and enter a start time.

NOTE – If you are scheduled over midnight and have a schedule that includes break minutes, you may select the 'Cancel Shift' scheduling tab and enter a start time for the system to automatically cancel any contiguous schedule(s) within the start time + number of hours entered.

10. Click the  icon to remove a certain day from the request.
11. As needed, enter comments for your supervisor.
12. Click 'Submit Request'. You will receive a message that the request has been sent to your supervisor and the request will be listed on the Requests page with a status of unanswered.

NOTE – If an employee is entering a request for over 24 hours on one day, a message will appear stating "This request is for more than 24 hours on a single day, are you sure you wish to continue?"

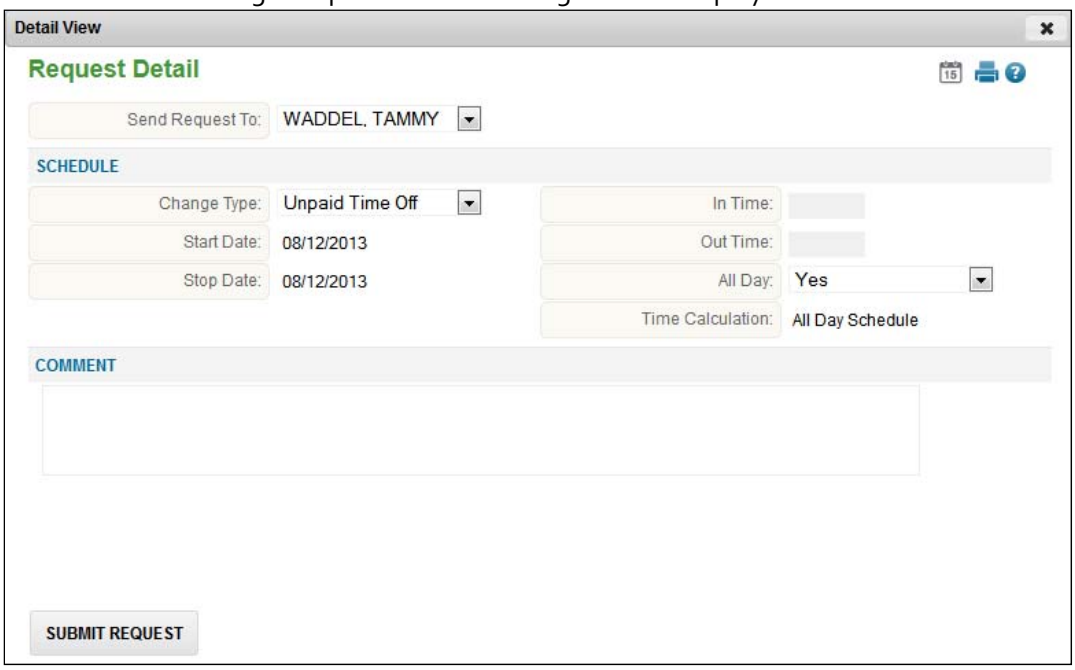
- If the employee selects 'OK' to this message, the supervisor will receive the same prompt when approving the request.
- If an employee is requesting more than one day of time off, it is recommended that the employee separate out the requested date(s) to ensure schedule deviations and hours records are created accurately.

After the supervisor has responded to the request(s) entered, the user will receive a notification on the 'Requests' area on the home page.

Submitting a Schedule Change Request:

To submit a Schedule Change Request, follow these steps:

1. Login to TimeStar™.
2. Click the Requests icon , or click Daily Procedure - Requests on the TimeStar™ menu.
3. Click the 'New Request' button. The menu will open upwards and display additional options.
4. Click 'Schedule Change Request'. The following window displays:



5. Use the drop-down to select which supervisor to send the request to.
6. Use the drop-down to select the type of schedule change request.

NOTE – You must enter each day as a separate request.

   a. Unpaid Time Off: Remove scheduled time for a day and take unpaid time off.
   b. Regular Schedule Override: Modify hours scheduled for a day.
   c. Additional Scheduled Time: Add a new schedule for a day or add hours scheduled for a day.
   d. Cancel Shift with Time Off: Remove any schedules that overlap the requested date and times off.

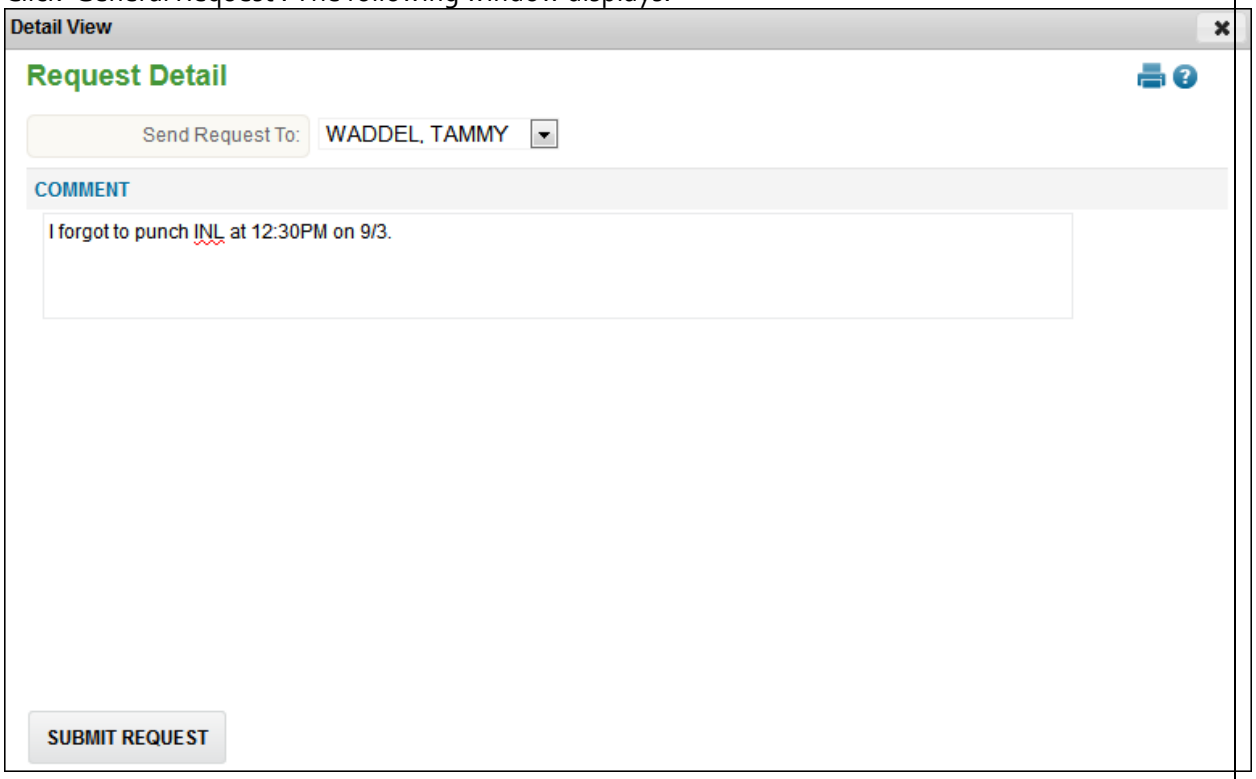
7. Enter the start and stop date this schedule change applies to.
8. To enter 'In & Out' times, uncheck the checkbox next to 'All Day' and enter the times.
9. If needed, enter comments for your supervisor.
10. Click 'Submit Request'. You will receive a message that the request has been sent to your supervisor and your request will be listed on the requests page with a status of unanswered.

After your supervisor has responded to the request(s) you have entered, you will receive a notification on the 'Requests' area on the home page.

Submitting a General Request:

To submit a General Request, follow these steps:

1. Login to TimeStar™.
2. Click the Requests icon , or click Daily Procedure - Requests on the TimeStar™ menu.
3. Click the 'New Request' button. The menu will open upwards and display additional options.
4. Click 'General Request'. The following window displays:



5. Use the drop-down to select which supervisor to send your request to.
6. Enter the request details in the 'Comment' section.
7. Click 'Submit Request'. You will receive a message that the request has been sent to your supervisor and your request will be listed on the requests page with a status of unanswered.

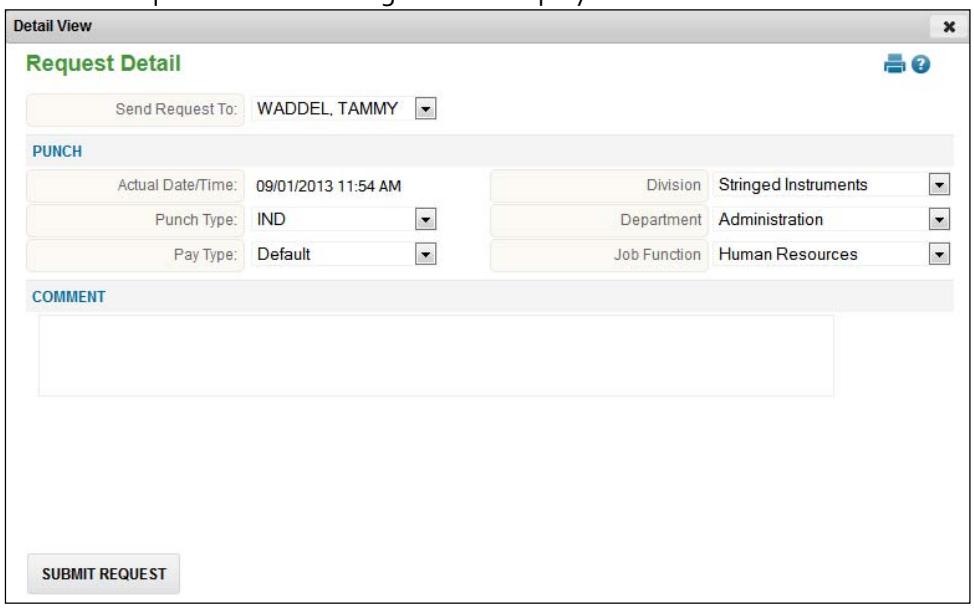
After your supervisor has responded to the request(s) you have entered, you will receive a notification on the 'Requests' area on the home page.

Submitting a Missing Punch Request:

To submit a Missing Punch Request, follow these steps:

1. Login to TimeStar™.
2. Click the Requests icon , or click Daily Procedure - Requests on the TimeStar™ menu.

3. Click the 'New Request' button. The menu will open upwards and display additional options.
4. Click 'Punch Request'. The following window displays:



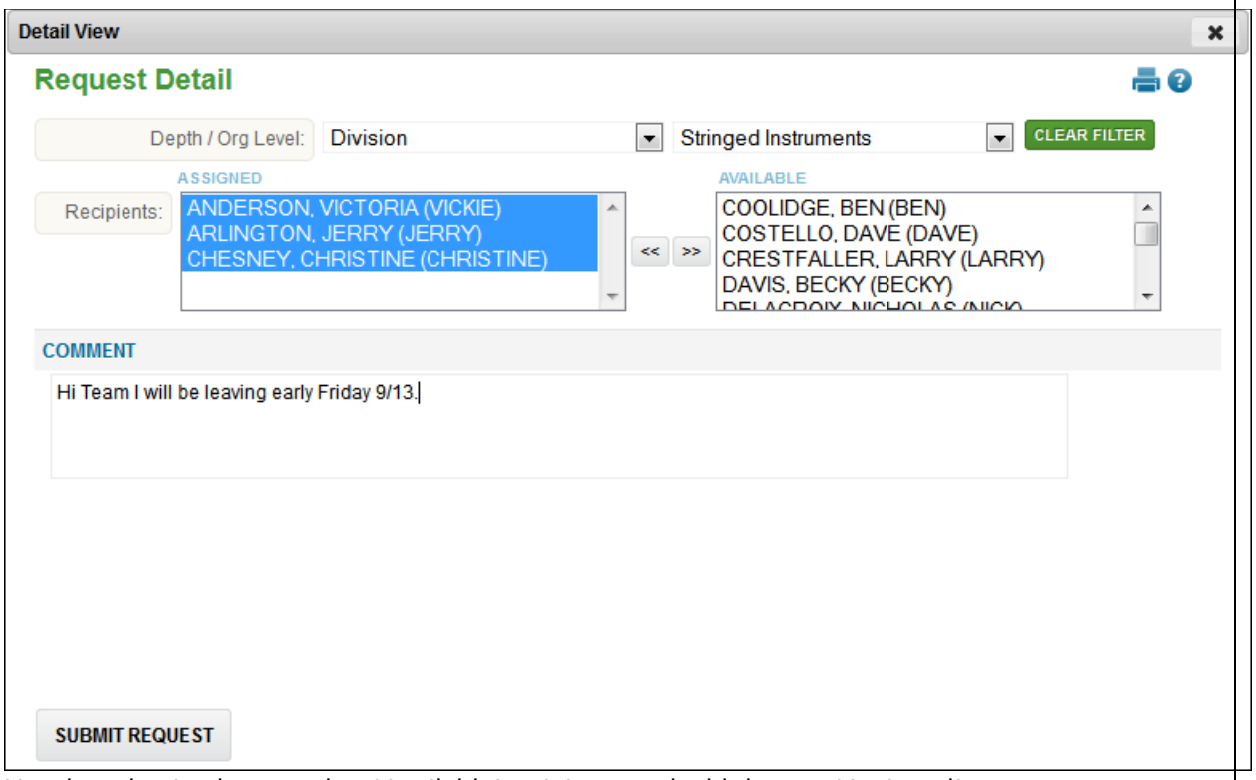
5. Use the drop-down to select which supervisor to send your request to.
6. Enter an 'Actual Date/Time' of the punch.
7. Use the drop-down to select a Punch Type.
8. Use the drop-down to select a Pay Type.
9. You may select different organization levels if needed.
10. Click 'Submit Request'. You will receive a message that the request has been sent to your supervisor and your request will be listed on the requests page with a status of unanswered.

NOTE –Users may also enter a missing punch request via the Punches page by clicking the icon next to the missing punch.

After your supervisor has responded to the request(s) you have entered, you will receive a notification on the 'Requests' area on the home page.

To submit a TimeStar Message, follow these steps:

1. Login to TimeStar™.
2. Click the Requests icon 0, or click Daily Procedure - Requests on the TimeStar™ menu.
3. Click the 'Message' button. The following window displays:



4. Use the selection box to select 'Available' recipients and add them to 'Assigned'.
5. Use the drop-down to specify users in a certain organization level. Use the 'Clear Filter' button to clear the organization level filter.
6. Enter your message in the message box.
7. Click 'Submit Request'. You will receive a message that the request has been sent to your supervisor and your request will be listed on the requests page with a status of unanswered.

After the user has responded to the request(s) you have entered, you will receive a notification on the 'Requests' area on the home page.

Monitoring Requests:

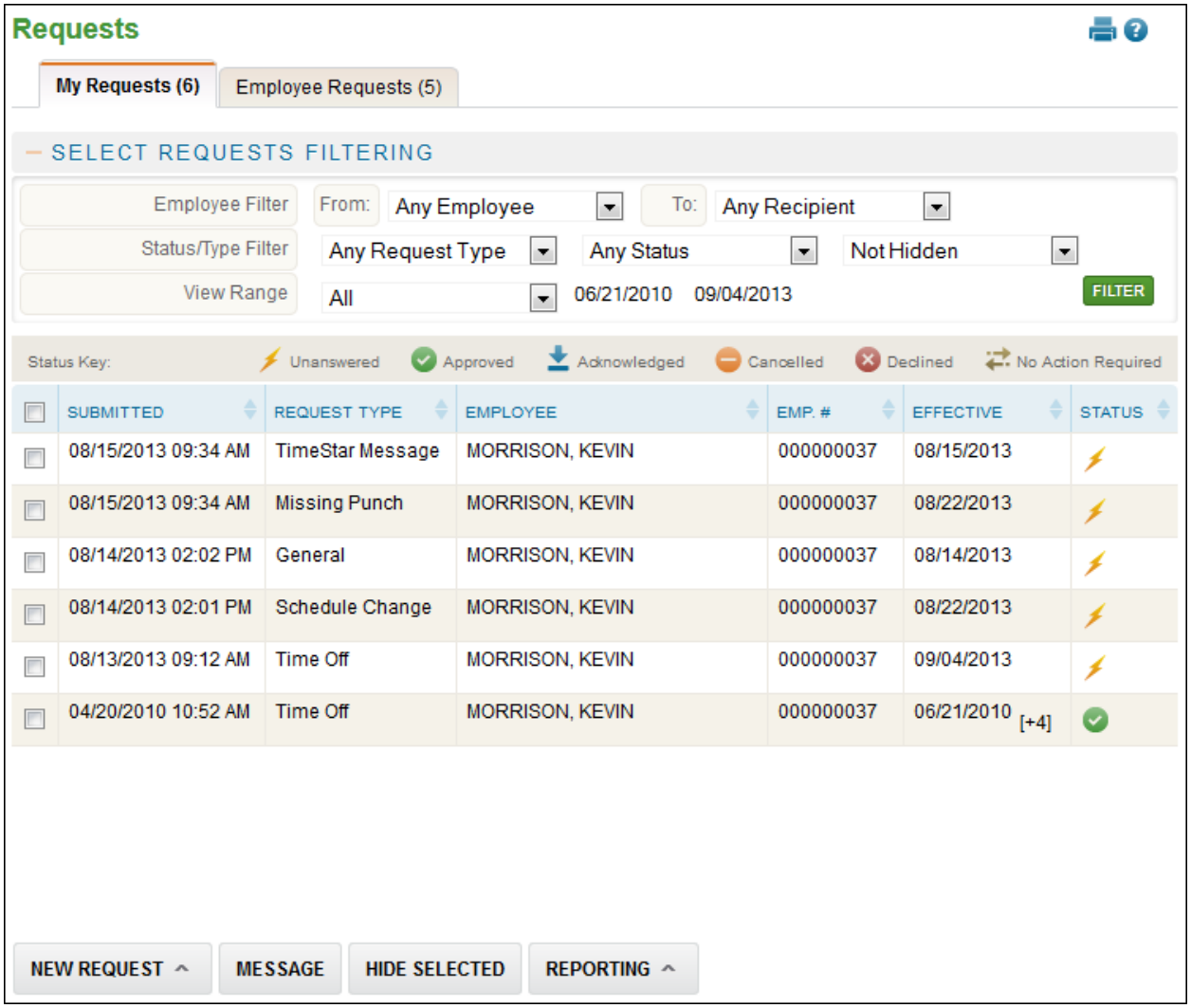
After an employee has submitted a request, a supervisor will receive a notification on the TimeStar™ Navigation Tree icon when logging in. An example of this is below:



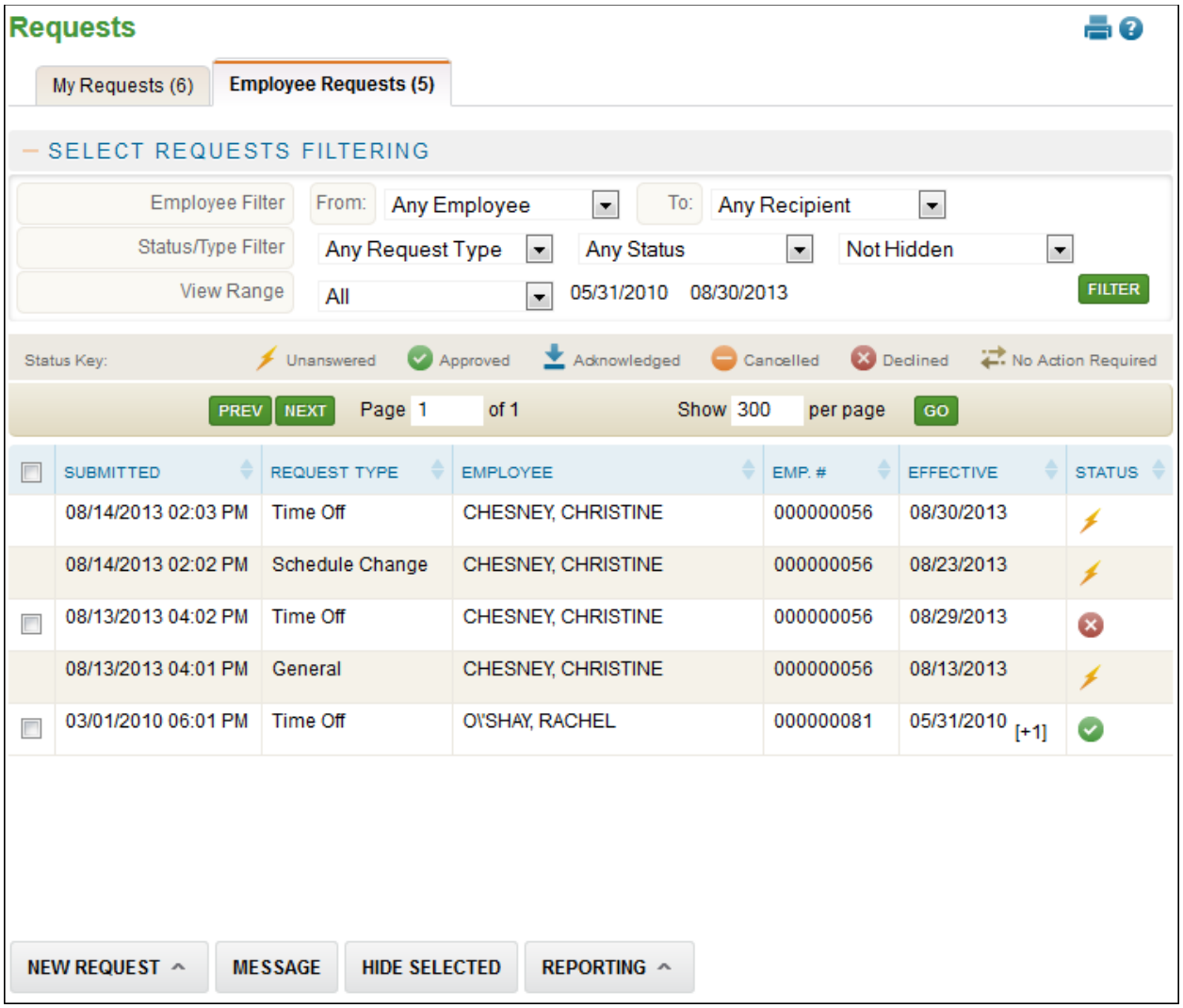
If the user has access to the Employee Request Widget on the home page, requests sent to them can be monitored via the widget. Please see Widget section for more information.

You may view the requests submitted by employees by selecting the icon with the number of requests waiting or Daily Procedures - Requests from the TimeStar™ menu.

The 'My Requests' screen displays requests made by the user logged in. The following is an example of information that will display on the tab:



The 'Employee Requests' screen allows a supervisor to view a list of the supervisee requests waiting to be answered. The following is an example of information that will display on the tab:

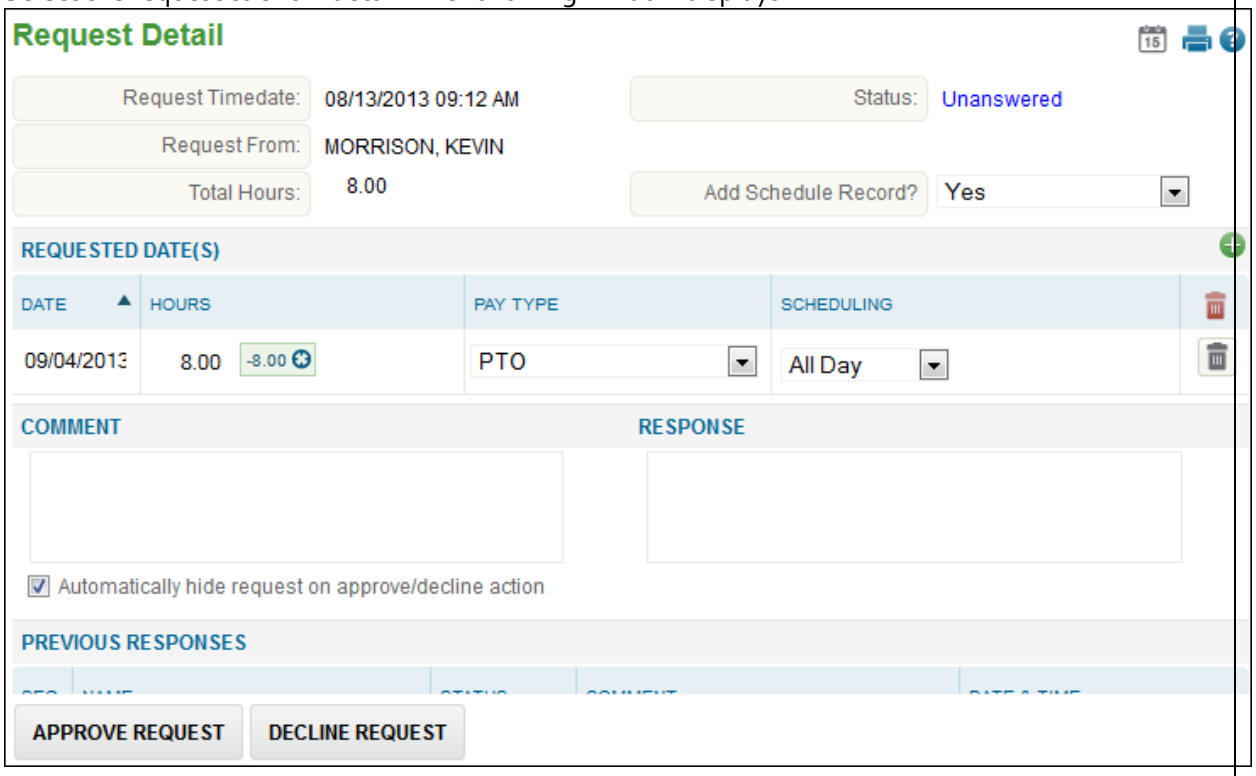


- Any TimeStar™ message requests will appear on the 'Employee Requests' screen.
- Use the Select Request Filtering section to display the requests you would like to see.
- If the user wants to display hidden requests, select the drop-down in the 'Status/Type Filter' to be 'Including Hidden', and then click 'Filter'.
- The request list displayed may also be filtered by Employee, Supervisor, Request Type, Status Type, and Date.
- The requested date range may be used to display only requests that were submitted within a specific date range.
- Any requests can be hidden by marking the checkbox on the left and clicking 'Hide Selected' button.
- When viewing hidden requests, the checkbox on the left will not be available because the request has already been hidden from the initial view.

For details on how to submit a request, please see the previous section 'Submitting a Request'.

To view the details of a request, follow these steps:

1. Login to TimeStar™.
2. Click the icon or go to Daily Procedures - Requests on the TimeStar™ menu.
3. Select the 'Employee Requests' page, if applicable.
4. A list of the unanswered requests will display.
5. Select the request to show detail. The following window displays:



To respond to a request, follow these steps:

1. Detail the record, as previously described.
2. The following fields display:
    a. Request Timedate: The date and time the employee submitted the request in TimeStar™.
    b. Request From: Employee's name who submitted the request.
    c. Total Hours: The number of hours the employee expects to have applied for this request.
    d. Status: The current status of the request
        i. Unanswered: Response has not been submitted.
        ii. Approved: Request has been approved.
        iii. Cancelled: Request has been cancelled.
        iv. Declined: Request has been denied.
        v. No Action Required: No action is needed.
        vi. Acknowledged: Message was read. Available for TimeStar™ Message and General Requests only.
    e. Comment: Comments the employee entered when submitting the request.
    f. Response: Comments entered when responding to the request.
    g. Previous Responses: Shows the order and status of the responses.

h. Sequence Status: Active, Inactive, or Completed.
i. Status: The status that corresponds with each user's response.
j. Comment: The response comment appears here.
k. Date & Time: Date & Time of the response.

3. Make any adjustments to the date(s) and other information as necessary.
   a. To deny part of the request (i.e. deny one day, but approve other days), you may select the  icon next to the date to deny.
   b. You may also add days (or separate out days if the request was submitted incorrectly), by selecting the 'Add' button.
4. Enter any comments in the 'Response' section.
5. Leave the 'Automatically hide request on approve/decline action' checked to hide request from the list after response. Uncheck it to keep the record in your list.



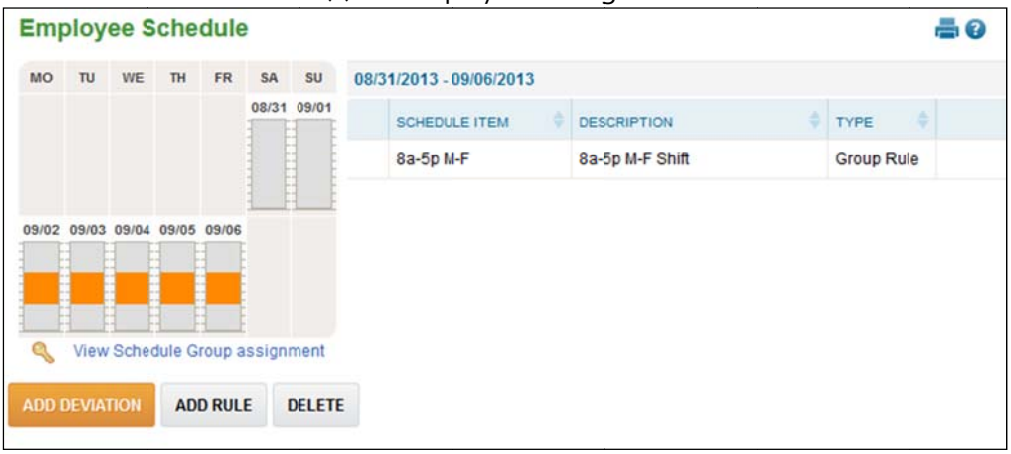
6. Select your response:
   a. Select 'Approve Request' to approve the request.
   b. Select 'Decline Request' to deny the request.
   c. Select 'X' if you do not want to respond at this time.
7. After your reply has been submitted, the employee's request notification will be updated detailing your response.

NOTE –TimeStar™ has the ability to send request information via email. Responses to request can be made through an email instead of users logging in to the system. Please contact Insperity Time and Attendance for more information on this functionality.

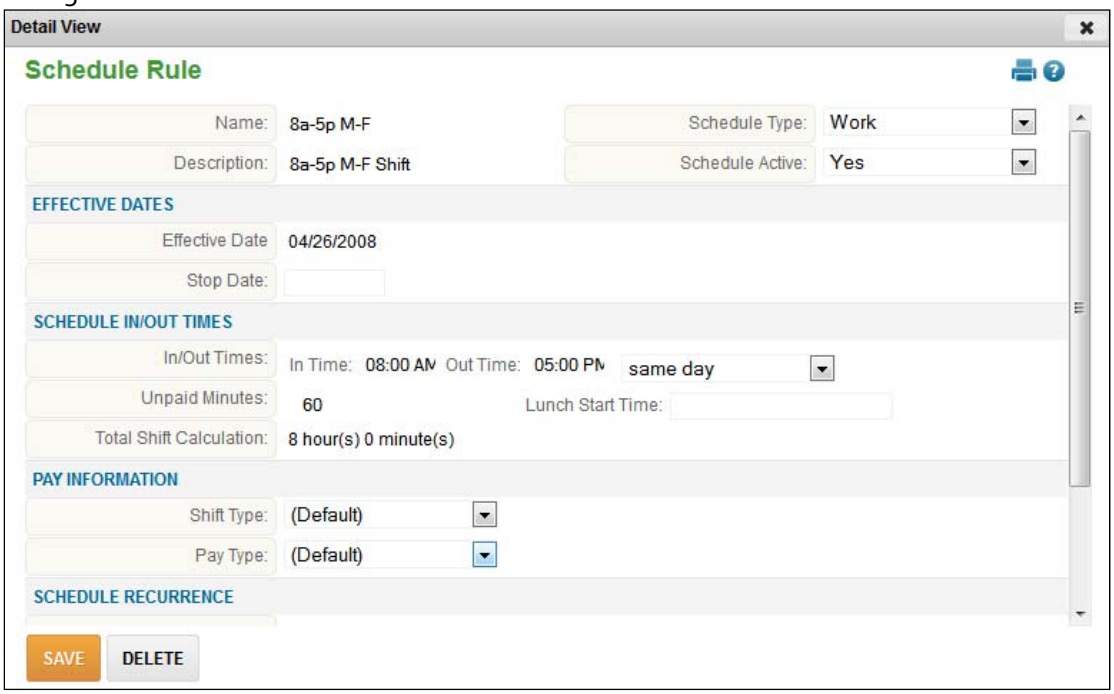
Schedules -Employee Schedule:

Employees must be assigned to a Schedule Group before any scheduled time can be applied. To assign a schedule to an employee, please see the Global Update chapter or Employee Maintenance chapter.

To view an employee's schedule, select Daily Procedures - Schedules – Employee Schedule. You will see a list of the schedule(s) the employee is assigned.



To view the details of any Schedule, select the name of the schedule under the Schedule Item heading.

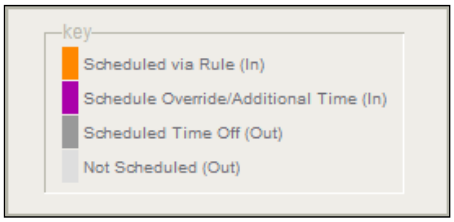


There are three types of schedules that will be displayed on this panel:

- Group Rule – a schedule that is assigned to the employee via the Schedule Group tab in Employee Maintenance - Groups.
- Employee Rule - a schedule that is assigned to the employee via the 'New Rule' button.
- Deviation – a schedule that is assigned to the employee via a team schedule change or via a schedule deviation record.

When viewing this screen, if the user has access to the Employee Maintenance – Groups screen, an additional link will appear to View/Edit the employee's Schedule Group assignment. Select this link to go to the Employee Maintenance– Groups then Schedule Group page.

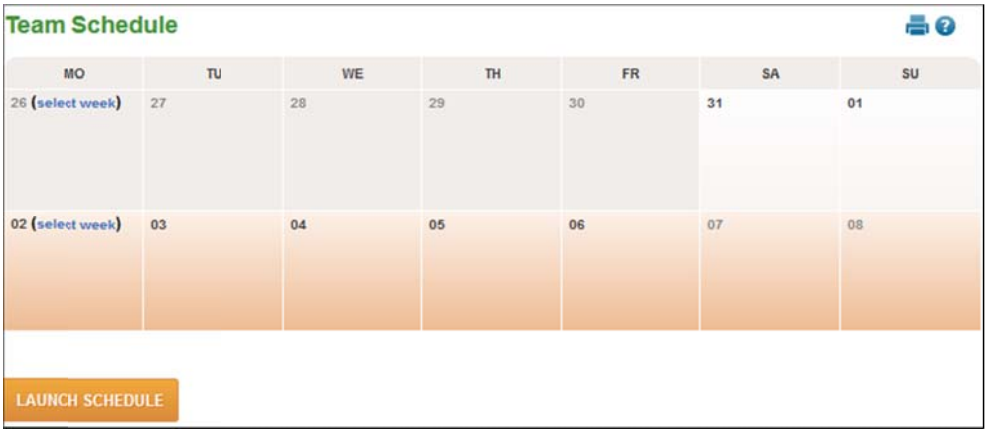
To the left of the schedule assignments, a calendar view of the schedule for the selected pay period appears. Scrolling over the value defines what each of the colors shown in the picture mean.



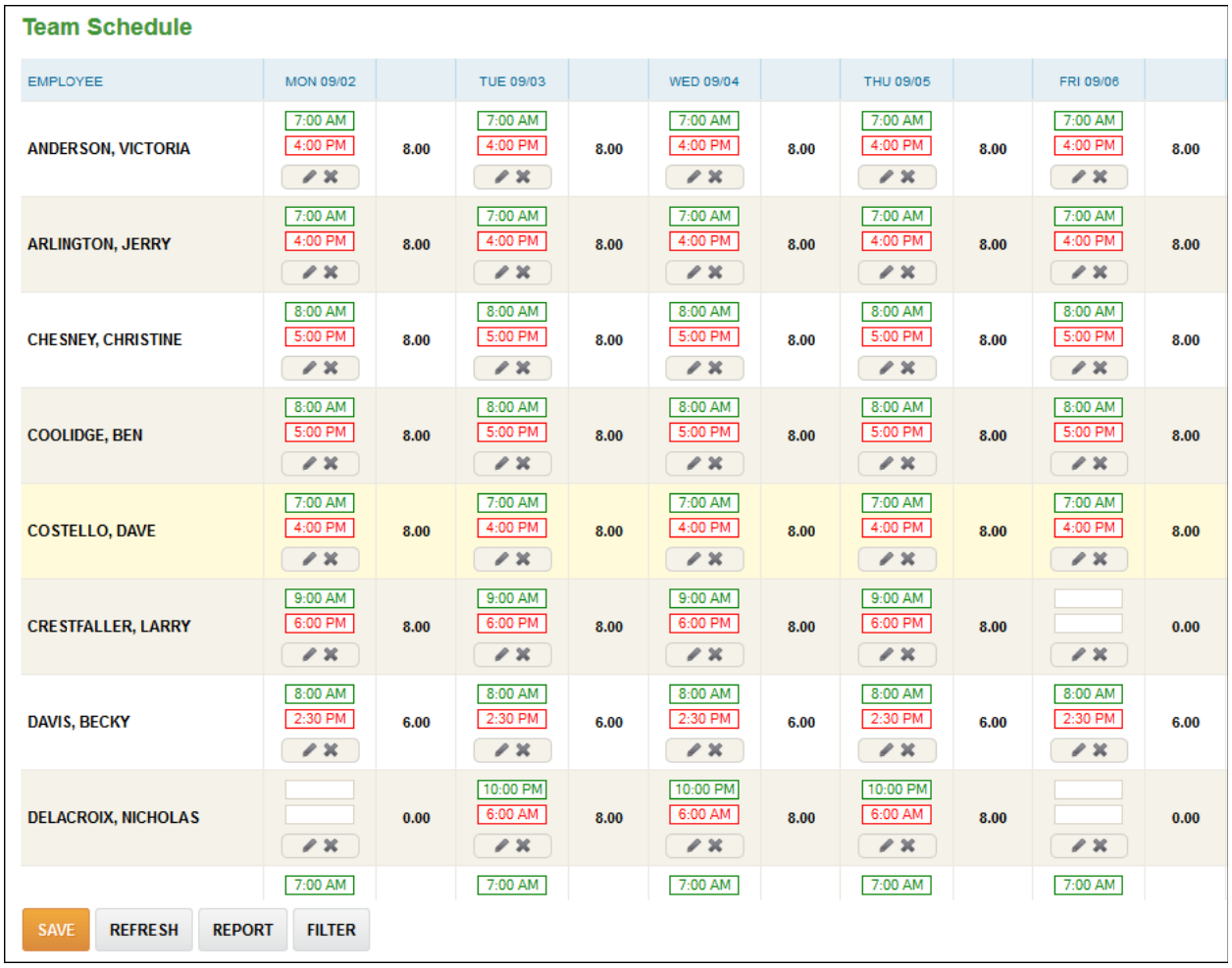
Schedules - Team Schedule:

A Team Schedule allows you to schedule multiple employees on one screen and receive hour totals by employee and by day.

Highlight the individual days on the Team Schedule page or select the link to highlight the whole week.



Click the 'Launch Schedule' button and the system will build a list of your employees and the schedule rules associated with each employee. The following screen displays:



- A report may be generated by clicking the 'Report' button. Please see Appendix K – Organization Level Report for more details.

- A filter can be set for the list by selecting the 'Filter' button at the bottom of the page.
- Users may edit the time(s) employees are scheduled by selecting the existing time and entering a new time.
- To cancel the current shift remove the scheduled time records and click 'Save'.
- Select the icon to create a day off for the schedule time.

NOTE – To ensure accurate schedule data, only select the icon for a day off if the employee is not scheduled over midnight. If the employee is scheduled over midnight, please follow the steps below to cancel a shift.

- Select the icon in the lower left corner of the scheduled day to create multiple shifts for the day, generate an Hours record, override organization levels, or cancel or delete shift(s).



Select this icon above the scheduled shift to add an additional shift to the schedule.

Select this icon to delete the scheduled shift.

NOTE – If an Hours record is associated with the scheduled shift, a message will appear to confirm you want to delete the Hours record as well.

Select this icon to cancel the shift by assigning time off. This option must be used to remove schedules over midnight from the team schedule page accurately.

Select this icon to display the detail screen that includes an option to generate Hours (if the system parameter is enabled) and override organization levels.

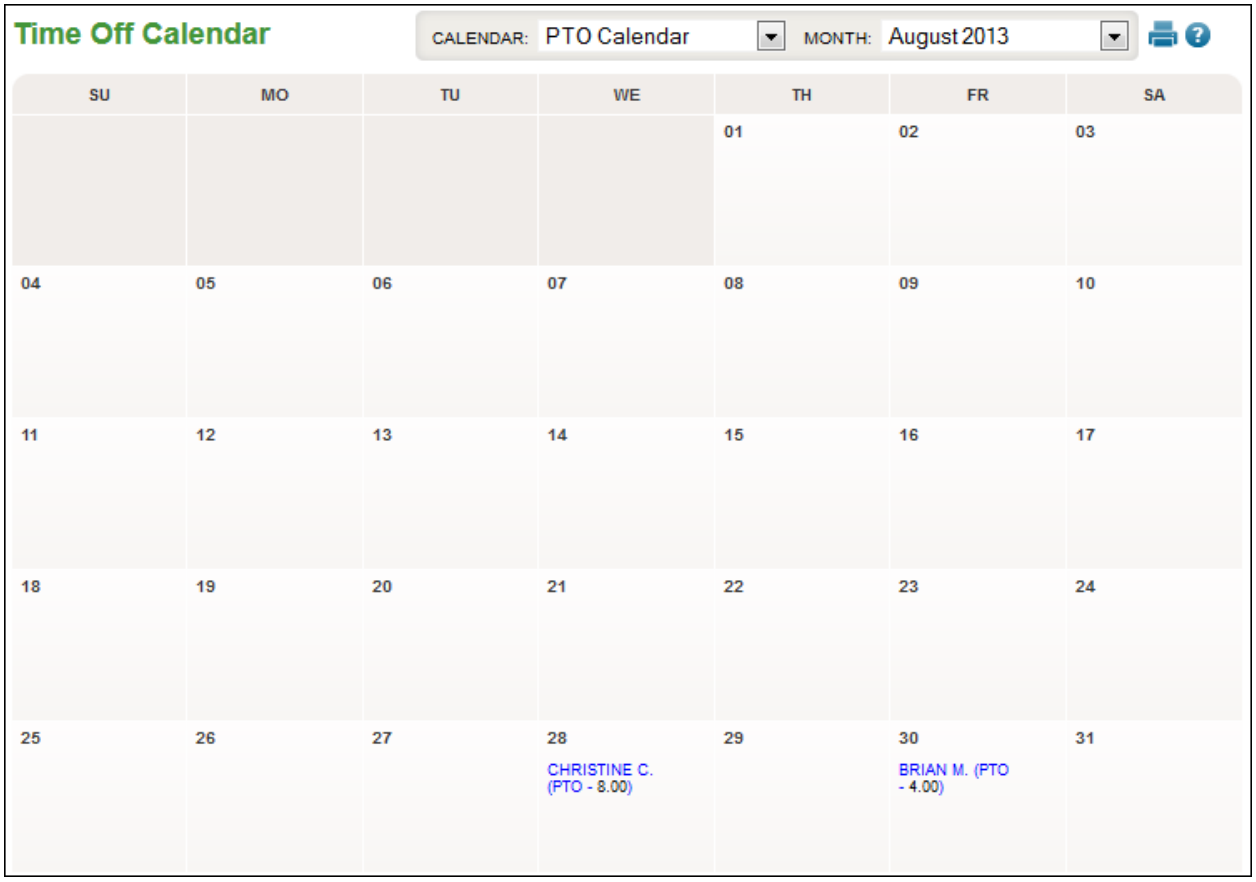
RESTORE Select this option to remove any changes you have made to the employee's schedule since the last save of Team Schedule information. The employee's schedule will display as it did before any changes were made.

NOTE – When assigning an Hours deviation record, you must first set the generate hours record option to 'Yes' and then enter the number of hours to award the employee using the IN/OUT options and define the pay type.

NOTE – If your system is setup with hours and minutes instead of decimal hours, the team schedule will display with those values.

Schedules - Time-Off Calendar:

The Time-Off Calendar provides a calendar view of Hours transactions and/or Schedule Deviations for a group of employees. This calendar is configurable under the Company Setup – Calendar Setup - Time-Off Calendar Setup page.



NOTE – If your system is setup with hours and minutes instead of decimal hours, the time-off calendar will display with those values.

Employee Maintenance

Employee Information - Accrual Summary:

The TimeStar™ application is versatile enough to allow you to transfer accrual balance information from an outside application, or calculate accrual data within the system.

TimeStar™ may be setup to deduct hours taken from the different accrual plans. Accruals may also be setup to calculate based on eligibility rules.

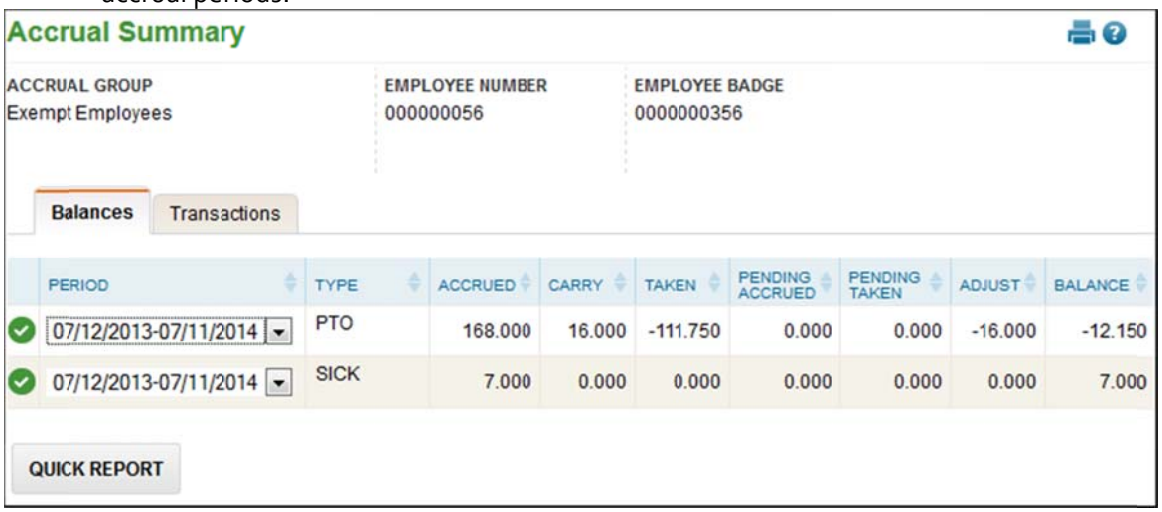
To have TimeStar™ setup to deduct taken time from accruals or calculate accruals, please contact an Insperity Time & Attendance Professional Services Representative for assistance.

Viewing Accrual Information:

Employee Maintenance –Employee Information - Accrual Summary

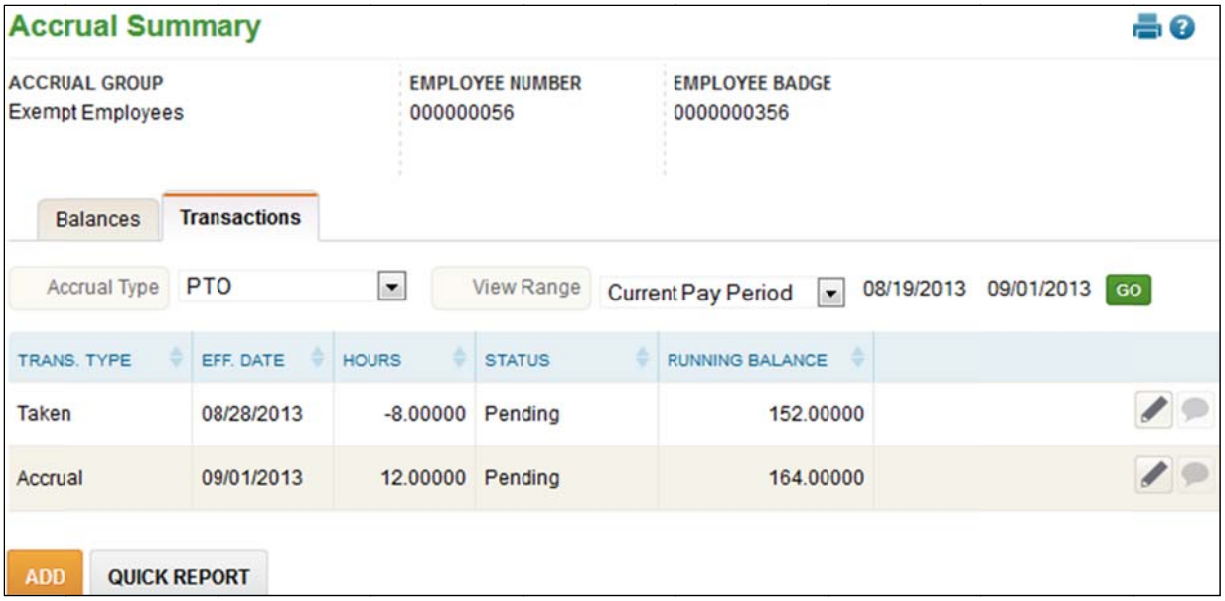
- The Accrual Summary page displays 2 tabs, Balances and Transactions.

- On the Balances tab, you have the ability to view balance information for each accrual plan assigned to an employee.
- Use the 'Period' drop-down to view accrual information for the previous and next accrual periods.



Field Name	Description
Period	The accrual period for the balance displayed. Select the drop-down to switch accrual periods to view balance information.
Type	The accrual plan defined in Company Setup–Accruals Setup – Accrual Plans.
Accrued	Hours accrued in previous pay periods.
Carry	Carryover hours from previous accrual years.
Taken	Hours taken in previous pay periods.
Pending Accrued	Hours set to become accrued in the current period or in future pay periods.
Pending Taken	Hours set to be taken in the current period or in future pay periods.
Adjust	The total hours of manual adjustment records. These adjustment records may have been entered by a user or created during a conversion from an earlier version of TimeStar™.
Balance	The current balance for the accrual plan.

The other view on the Accrual Summary page is Accrual Transactions, 'Transactions' tab. Below, is an example of information that appears on this tab:



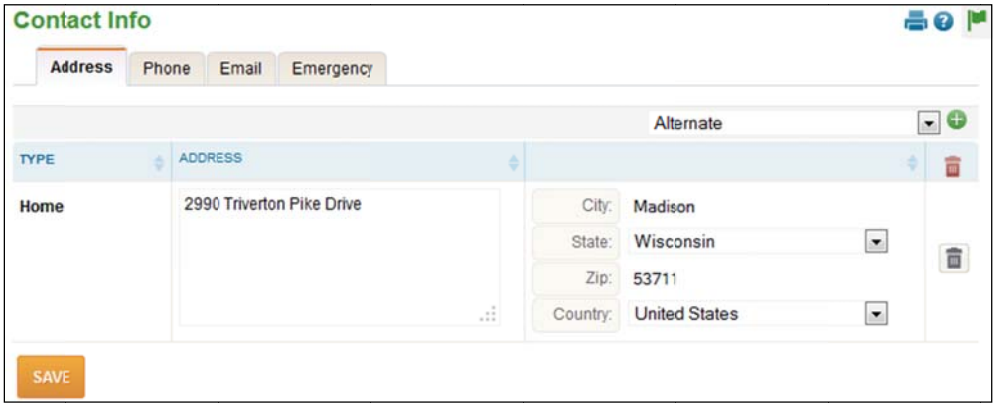
On this tab, all accrual transactions will appear in a sequential list by effective date. Specific date ranges may be specified to view this page.

When this page is initially selected, the first accrual plan's transactions for the current pay period will be displayed. Use the 'Accrual Type' drop-down to switch to another accrual plan. Use the 'View Range' drop-down to view transactions by a different date range.

Field Name	Description
Trans.Type	The type of accrual transaction. Available transaction types include Accrual, Accrual Adjustment, Beginning Balance, Carryover, Carryover Adjustment, Expired, Manual Adjustment, Taken and Taken Adjustment.
Eff. Date	The effective date for the transaction type.
Hours	The hours amount of the transaction.
Status	Indicator if the transaction is pending (taken or accrued in the current period or into the future). Transactions that are pending will be denoted with 'Pending' in the 'Pending' column. Transactions that are no longer pending will be denoted with 'Closed' in the 'Pending' column.
Running Balance	The running balance of the accrual type.

Employee Information - Contact Info:

The Contact Info page allows users to add general contact information for each employee.



1. On this page, enter the employee's Address, Phone, Email, and Emergency Contact information.
2. Click the 'Save' button when you have completed entering the data in each of these areas.