



Insperity®

Units - User Guide

Reference Guide for Time & Attendance Users

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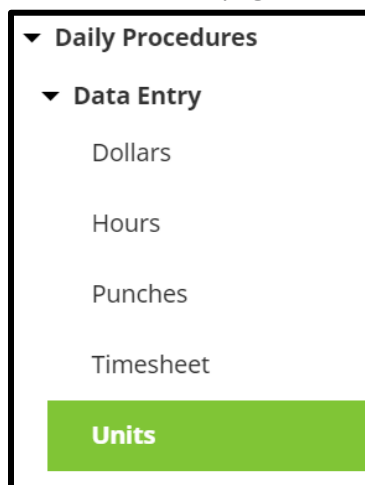
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Introduction

The Units page in Time and Attendance is used to track numbers of units of a specific item or items across time. Often, a dollar or hour per unit amount is established, which in turn automatically ties each unit record to a dollars or hours record.

Navigating to the Units Page

1. In the **Main Navigation** menu, open the **Daily Procedures** folder.
2. Open **Data Entry** subfolder.
3. Click on the **Units** page.



Reviewing the Units Page

1

Units 🚩

Total Hours
43h 0m

Punches: 43h 0m / Hours: 0h 0m

Employee Number
3113066

Employee Badge

Approvals

NO NO

EMPLOYEE SUPERVISOR

Effective	Amount	Type	Device	Source	Linked To	
12/08/2020	200.00	Screws ▾	TimeStar ▾	TimeStar	N/A	✎ 🗑️ 📄
12/10/2020	15.00	Widget ▾	TimeStar ▾	TimeStar	N/A	✎ 🗑️ 📄

3

1. Summary Bar

- a. Total Hours** – Total recorded time from the Punches and Hours pages
- b. Employee Number** – Assigned employee number
- c. Badge Number** – Employee’s badge number if hardware clocks are in use
- d. Approvals** – Status of employee and supervisor approvals

2. Units – Unit records for the elected employee. For definitions of each field, see the section titled “[Units Detail Definitions](#).”

3. Unnamed Column – Buttons that allow additional interaction with the units. They include:

- a. Edit** – Edit details of the units
- b. Delete** – Delete the units
- c. Audit Log** – View details of the audit log associated with the units

Units Detail Definitions

Below is a list of the fields in the order in which they may be seen on the main Units page or within the Detail View pop-up window when editing or adding a units record. Access to these fields is dependent on company setup and individual security.

Effective – Effective date of the units record
Unit Type – Type of units applied to the record
Amount – Number of units associated with the record
Device Number – Device from which the units record originated
Source Code – Source from which the units record originated
Comment – Comment (to be) associated with the units record
Organization Level – Organization level items assigned to the units record
Linked To – The hours or dollars record to which the units are linked

Editing a Units Record

With the appropriate security, any item that displays on the main portion of the Units page can be edited by selecting and overwriting the data within the appropriate field and clicking **Save**.

Additional units information can be edited using the following steps:

1. Click the **Edit** button to on the record to be edited. *The Detail View pop-up window opens.*
2. Adjust the field(s) as needed. At minimum, the Effective Date, Unit Type, and Amount fields must be completed. For definitions of each field, see the section titled "[Units Detail Definitions.](#)"
3. Click **Save**.

Deleting a Units Record

Use the following steps to delete a units record:

1. Click the **Delete** button to the right of the units to be removed. *A warning message opens to confirm the deletion of the record.*
2. Click **OK**.

Adding a Units Record

To add a single units record:

1. Click the **Add** button, located at the bottom left of the page. *The Detail View pop-up window opens.*
2. At minimum, the Effective Date, Unit Type, and Amount fields must be completed. For definitions of each field, see the section titled "[Units Detail Definitions.](#)"
3. Click **Save**.

Adding Many Units Records

To add many units records at once, it is best to use the Timesheet option.

1. In the **Main Navigation** menu, open the **Daily Procedures** folder.
2. Open **Data Entry** subfolder.
3. Click on the **Timesheet** page.
4. Use the drop down located on the second row of the Timesheet to select the worksheet to use. These are created and customized for each install, but will typically have a separate timesheet for units.
5. Find the date of the units record, and fill in the applicable fields. For definitions of each field, see the section titled "[Units Detail Definitions.](#)"
 - a. To add an additional record to the same day, use the **Plus-Add Units** button located on the units block.
 - b. For more detailed information about using the Timesheet, see the "[Timesheet](#)" User Guide.
6. Click **Save**.