



Insperity®

Dollars & Mileage - User Guide

Reference Guide for Time & Attendance Users

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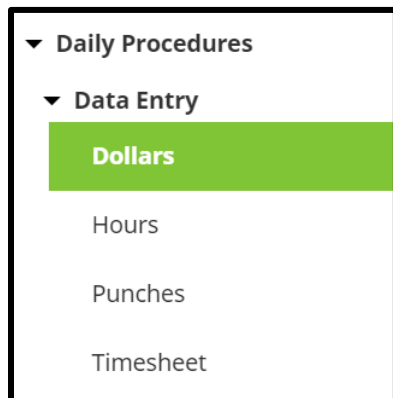
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Introduction

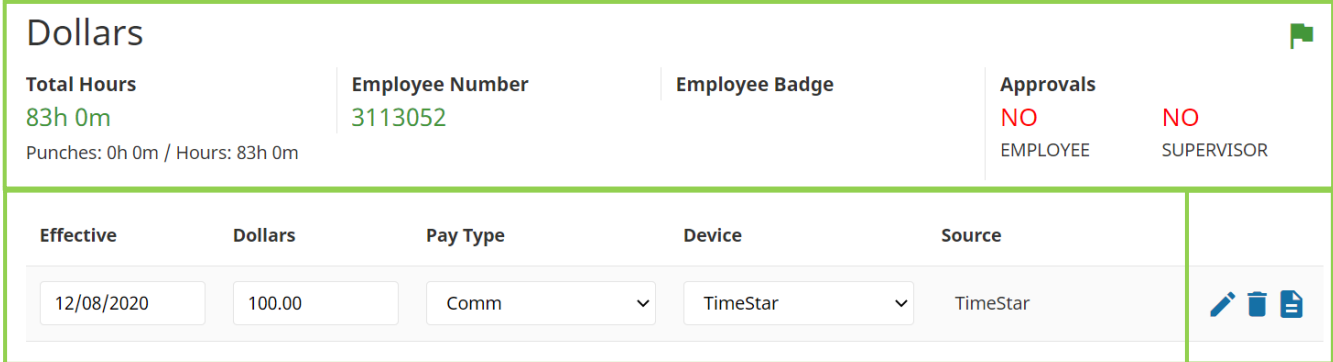
The Dollars page in Time and Attendance is used to track employees' earned dollars. If mileage is being tracked, it will also be added and edited from this screen. Access is dependent on user security and company set up.

Navigating to the Dollars Page

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






Reviewing the Dollars Page



1 Dollars

2

3




Effective	Dollars	Pay Type	Device	Source	
12/08/2020	100.00	Comm	TimeStar	TimeStar	  

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. Dollars and/or Mileage – Each dollars and/or mileage record. For definitions of each field, see the section titled “[Detail Definitions.](#)”

3. Unnamed Column – Buttons that allow additional interaction with the record. Options include:

- a.  **Edit** – Edit record details
- b.  **Delete** – Delete record
- c.  **Audit Log** – View details of the record’s audit log

Detail Definitions

Dollars Detail Definitions

Below is a list of the fields in alphabetical order that may be seen on the main Dollars page, or within the Detail View pop-up window when editing or adding a dollars record. Access to these fields is dependent on company set up.

1. **Amount** – Dollar amount of the record
2. **Comment** – Comment (to be) associated with the dollars record
3. **Device** – Device from where the dollars record originated
4. **Device Number** – Device from where the dollars record originated
5. **Dollars** – Dollars amount of the record
6. **Effective** – Effective date of the dollars record
7. **Organization Level(s)** – Organization level items assigned to the dollars record
8. **Pay Type** – Pay Type applied to the dollars record
9. **Source** – Source from where the dollars record originated
10. **Source Code** – Source from where the dollars record originated

Mileage Detail Definitions

Below is a list of the fields in alphabetical order that may be seen on the main Dollars page, or within the Detail View pop-up window when editing or adding a mileage record. Access to these fields is dependent on company set up.

1. **Amount** – Dollars amount of the record.
 - a. This field auto calculates based on the Rate and Miles fields.
2. **Begin Miles** – Defaults to one mile after the last entry made
3. **Comment** – Comment (to be) associated with the mileage record
4. **Device** – Device from where the mileage record originated
5. **Dollars** – Dollars amount of the record
6. **Effective** – Effective date of the dollars record
7. **End Miles** – Last mile driven
8. **Organization Level(s)** – Organization level items assigned to the mileage record
9. **Pay Type** – Pay Type applied to the mileage record
10. **Rate** – Rate per mile
11. **Source** – Source from where the mileage record originated
12. **Total Miles** – Total miles driven
 - a. This field cannot be edited if the Begin and End Mile fields are enabled.
13. **Vehicle** – Vehicle driven

Editing a Record

Editing a Dollars Record

With the appropriate security, any item that displays on the main portion of the Dollars page can be edited simply by selecting and overwriting the data within the appropriate field. When finished, click **Save**.

Additional dollars information can be edited using the following steps:

1. Click the **Edit** button of the record to be edited.



The Detail View pop-up window opens.

2. Adjust the field(s) as needed. At minimum, the **Effective Date**, **Pay Type**, and **Amount** fields must be completed. For definitions of each field, see the section titled "[Dollars Detail Definitions](#)."
3. Click **Save**.

Editing a Mileage Record

Any item that displays on the main portion of the Dollars page can be edited simply by selecting and overwriting the data within the appropriate field. When finished, click **Save**.

Additional mileage information can be edited using the following steps:

1. Click the **Edit** button of the record to be edited.



The Detail View pop-up window opens.

2. Adjust the field(s) as needed. At minimum, the **Effective Date**, **Pay Type**, and **Total Miles OR Begin/End Miles** must be completed. For definitions of each field, see the section titled "[Mileage Detail Definitions](#)."
3. Click **Save**.

Deleting a Record

Use the following steps to delete a record:

1. Click the **Delete** button of the dollars or mileage to be removed.



A warning message appears to confirm the deletion of the record.

2. Click **OK**.

Adding a Record

Adding a Dollars Record

To add a single dollars record:

1. Click the **Add Dollars** button.



The Detail View pop-up window opens.

2. At minimum, the **Effective Date**, **Pay Type**, and **Amount** fields must be completed. For definitions of each field, see the section titled "[Dollars Detail Definitions.](#)"
3. Click **Save**.

Adding a Mileage Record

To add a single mileage record:

1. Click the **Add Dollars** button.



The Detail View pop-up window opens.

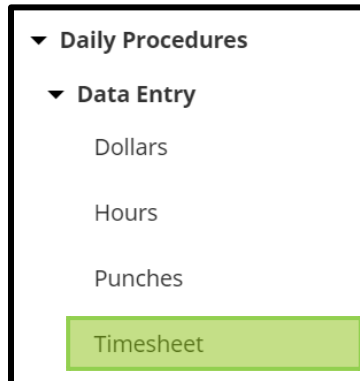
4. At minimum, the **Effective Date**, **Pay Type**, and **Total Miles OR Begin/End Miles** must be completed. For definitions of each field, see the section titled "[Mileage Detail Definitions.](#)"
5. Click **Save**.

Adding Many Records


Adding Many Dollars Records

To add many dollars 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.



The Timesheet opens in a new window or tab within the browser.

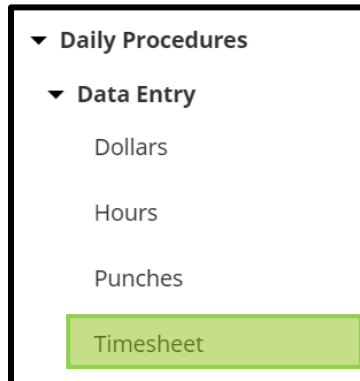
4. Use the drop-down located on the second row of the Timesheet to select the worksheet to use. These are created and customized for each company, but will typically have a separate timesheet for dollars.
5. Find the date of the dollars record, and fill in the applicable fields. For definitions of each field, see the section titled "[Dollars Detail Definitions](#)."
 - a. To add an additional record to the same day, use the **Plus-Add Dollars** button located on the dollars block.

 - b. For more detailed information about using the Timesheet, see the "[Timesheet](#)" User Guide.
6. Click **Save**.

NOTE: Adding more than one dollars records of the same pay type, and the same org level items, with the same date range **will** cause payroll errors. If you are adding multiple dollars records with the same criteria, it is recommended that the multiple records are combined into one record.


Adding Many Mileage Records

To add many mileage 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.



The Timesheet opens in a new window or tab within the browser.

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 mileage.
5. Find the date of the mileage record, and fill in the applicable fields. For definitions of each field, see the section titled "[Mileage Detail Definitions.](#)"
 - a. To add an additional record to the same day, use the **Plus-Add Mileage** button located on the mileage block.
 A button with a blue plus sign icon and the text 'ADD MILEAGE' in blue capital letters.
 - b. For more detailed information about using the Timesheet, see the "[Timesheet](#)" User Guide.
6. Click **Save**.