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Insperity Mobile Time and Attendance Application Set Up

User Guide

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# Introduction

Features of the Time and Attendance system are available on a mobile application. This document presents the setup requirements to activate mobile access.

# Overview of Setup Requirements

In order to set up mobile access for a group of users, the below steps must be taken. These steps are explored in further detail under the Mobile Setup Process section.

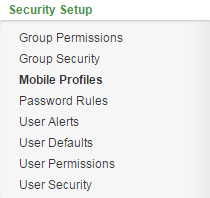
1. Set up a Mobile Profile/Profiles.
2. Attach the Mobile Profile to the appropriate Security Group/Groups.

# Mobile Setup Process

## Mobile Profile

A mobile profile or profiles must be created to attach to the users that will need access to the mobile application. To do so, follow the below steps:

1. In the **Main Navigation** menu, open the **Security Setup** folder.
2. Click on the **Mobile Profiles** page.



*The Mobile Profiles page opens.*

1. Click the **Add** button.
2. Assign a **Name** and **Description** to the new profile.
3. Select applicable feature(s) from the list of available features and click the **Plus** button.
4. Click **Save.**

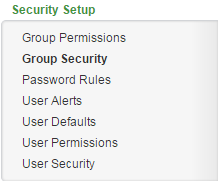
*The main Mobile Features page reappears with the current Mobile Profile selected.*

1. Use the drop down in the **Assigned Features** bar to select a feature to apply. Once chosen, click the **Plus**  button to add it to the profile. Return to this drop down to continue to add features until complete.
2. Click **Save**.

## Attaching a Security Group

After a mobile profile is set up, it must be placed in to the Security Group(s) of the employees that will access the mobile application by following the below steps:

1. In the **Main Navigation** menu, open the **Security Setup** folder.
2. Click on the **Group Security** page.



*The Group Security page opens.*

1. Select the Security Group from the **Select Group** drop down.
2. In the **User Properties** section, select applicable Mobile Profile under the **Mobile Profile** drop down.
3. Click **Save**.

# Frequently Asked Questions

## Why are my mobile setup menu options not available?

If you do not have access to the mobile setup options displayed in this document, your system license likely needs to be updated. Please contact your Insperity Time and Attendance representative to activate the Mobile Application option.

## Am I able to activate mobile access for only one user?

If security should only be applied to one user, the Mobile Profile may instead be attached to the User Security in place of Group Security. To do so, open the **Security Setup** menu, and click on the **User Security** page. Select the employee to update from the overall **Employee Drop Down**. Once their user security page opens, attach their Mobile Profile from the **Mobile Profile** drop down and click **Save**. This setting will override any attached Group Security.