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# Passport Insperity Single Sign-on Tool User Guide

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## Passport Insperity Single Sign-on Tool



- This guide provides an overview of the Insperity Passport single sign-on tool.
- Use this guide to understand, create, maintain, and troubleshoot your Insperity Passport account.
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## System Requirements

IMPORTANT: Before starting this process, it is a good practice to clear your browser's cache and cookies. For instructions on this, see the Clearing the Browser's Cache and Cookies on page 20. Single sign-on is supported in the following OS and browser environments.

**IMPORTANT:** Although SSO is supported in the following OS and browser environments, refer to the documentation for your particular application as it may not necessarily support the same environments. For example, SSO may be supported in one of the environments, but the HCM or TimeStar applications may not be.

### Supported Operating Systems
The following table displays the supported operating systems.

| Operating System | Version |
| --- | --- |
| **Mac** | |
| Mac OS X 10.6 | 10.6.8 |
| Mac OS X 10.7 | 10.7.5 |
| Mac OS X 10.8 | 10.8.5 |
| Mac OS X 10.9 | 10.9.0 or later |
| **Windows** | |
| Windows XP | SP3 |
| Windows Vista | SP2 |
| Windows 7 | All |
| Windows 8 | All |
| Windows 8.1 | All |
| **Mobile** | |
| iOS5 | 5.1.1 |
| iOS6 | 6.1.6 |
| iOS7 | 7.0 or later |
| Android | 4.0 or later |
| BlackBerry | 10 and later |
| Windows Phone 8 | 8 and later |
| **Others** | |
| Ubuntu | 12.04.4 LTS |
| Chrome OS (Chromebook and Chromebox) | Chrome OS 29 and later |

### Supported Internet Browsers
The following tables display the supported browsers for desktops and mobile devices.

| Browser | Version |
| --- | --- |
| **Desktop** | |
| Microsoft® Internet Explorer® | 7-11 |
| Mozilla® FireFox® | 10 or later |
| Apple® Safari® | 5 or later |
| Google Chrome™ | 17 or later |

| Mobile Device OS | OS Version | Browser |
| --- | --- | --- |
| iOS | 5.1.1 or later | Safari |
| Android | 4.0 or later | Android Browser, Google Chrome |
| Windows Phone | Windows Phone 8 or later | Internet Explorer Mobile |
| BlackBerry® | BlackBerry 10 or later | BlackBerry Browser |

**Display Settings**
For the optimal viewing, a minimum screen resolution of 1024 x 768 is recommended.

## What is Insperity Passport?

Insperity Passport is a two-factor authentication, single sign-on process that provides simplicity, security, and time-savings by allowing you to sign on once to seamlessly access multiple Insperity services. Insperity Passport provides the following benefits:

- Reduces password fatigue by reducing the number of username and password combinations you need to remember.
- Provides additional security by requiring two-factor authentication to confirm you are who you say you are.
- Reduces the likelihood of falling victim to phishing scams.
- Saves you time by not requiring you to sign on multiple times while using Insperity services or having to troubleshoot sign-on issues for multiple usernames.

**Password Tips**
When creating your password, note the following guidelines:

- Passwords must be 8 characters long.
- Passwords must include 3 of the following: upper case, lower case, numbers, and special characters. The following special characters are allowed:
  ! @ # $ % & * ( ) − _ [ ] { } \ | < > / ?

**Using Insperity Passport for the First Time**

**IMPORTANT:** Before starting this process, it is a good practice to clear your browser's cache and cookies. For instructions on this, see the Clearing the Browser's Cache and Cookies on page 20.
To start using Insperity Passport you must first create your passport.

1. Access the Insperity Portal Login screen to begin the process.

2. From the Insperity Portal Login screen, click Create Passport.
   The Identify portion of the Create Passport screen displays.



3. Enter the last four digits of your social security in the Last 4 of SSN field.
4. Enter your Birth Date.
   NOTE: You can click in the Birth Date field to use the calendar pop-up to enter your birth date.
5. Enter your Last Name.
6. Click Next.
   The Create portion of the Create Passport screen displays.



7. Enter a Username.
   NOTE: The user name must be in email format. This email will not be used for communications.
8. Enter a Password.
   **NOTE:** See the Password Tips section for tips on password creation.
9. Confirm the password you entered in the Confirm Password field.
10. Enter the Email that you want to use to receive messages when changes to your account occur or when your account is being authenticated.

11. Optionally, enter a Phone number. This is used to verify your identity in case of a forgotten username or password.
12. Click Create.
    The Finished portion of the Create Passport screen displays.



13. Click Go to login.
    The Insperity Portal Login screen displays.
14. Enter your Username and Password.
15. Click Log In.
16. The Insperity Portal Login updates prompting you to enter your knowledge-based questions.



17. For all three questions, use the drop-down menu to select a question, and then enter the most appropriate response as it relates to your situation.
18. Click Update.
    The Integrity Passport Login screen displays.

19. Use the drop-down menu to select a company, a profile, and the role you want to sign in as. NOTE: If you have multiple companies, profiles, and/or roles, you will have drop-down menus to select from. If you do not have multiple entities, a default selection is made.
    IMPORTANT: If you do have multiple entities associated with your username, there may be a slight delay before the next drop-down menu is presented on the screen. Wait for the subsequent options to display before clicking Continue.
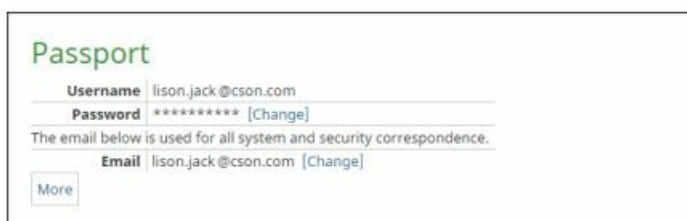20. Click Continue.
    The Home page displays.

## Passport Maintenance

The following sections guide you through the process of maintaining your Passport credentials including your password, your contact email, and security questions.

### Changing Your Password
To change your password:

1. Log into the Employee Self-Service Portal.
2. From the home page left navigation bar, click My Profile > Personal Information and scroll down to the Passport section.



3. In the Passport section, click the Change link next to the Password field.
   The Change Password dialog box displays.

4. Enter your email in the Username field.
5. Enter your New Password.
   NOTE: Passwords must be 8 characters long and must include 3 of the following: upper case, lower case, numbers, and special characters. The following special characters are allowed:
   ! @ # $ % & * ( ) − _ [ ] { } \ | < > / ?
6. Enter it again in the Retype New Password field.
7. Click Set Password.
   A confirmation window displays.
8. Click OK.
9. Close the Change Password dialog box.
10. Click the LogOut link in the upper right-hand corner and log back in using your new password.

**Changing Your Contact Email**
To change your contact email address:

1. Log into the Employee Self-Service Portal.
2. From the home page left navigation bar, click My Profile > Personal Information and scroll down to the Passport section.



3. In the Passport section, click the Change link next to the Email field.
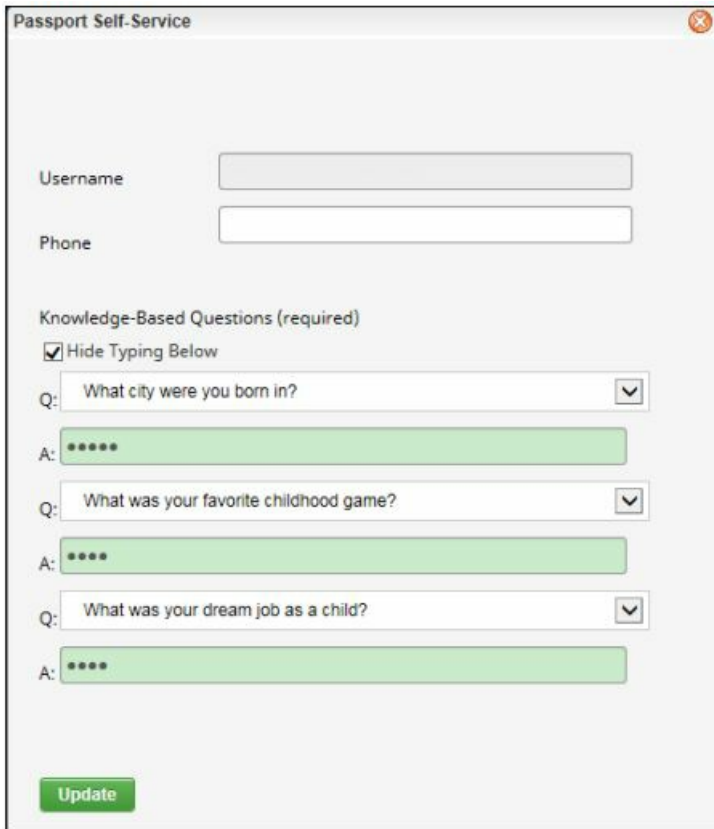   The Change Email dialog box displays.



4. Enter your new email in the Email Address field.
5. Click Save.
   A confirmation window displays.
6. Click OK.
7. Close the Change Email dialog box.

8. Click the LogOut link in the upper right-hand corner and log back in using your new password.

**Updating Your Security Questions and Contact Phone**
To update your security questions and you contact phone number,

1. Log into the Employee Self-Service Portal.
2. From the home page left navigation bar, click My Profile > Personal Information and scroll down to the Passport section.
3. Click the More link.
   The Passport Self-Service screen displays.



4. Update your Phone info if needed.
5. If necessary, click the Hide Typing Below checkbox to hide and show the answers to your security questions.
6. Use the question drop-down menus to select your new questions and enter your answers, or simply update your answers to your existing questions.
7. Click Update.
   A confirmation message displays confirming your updates.
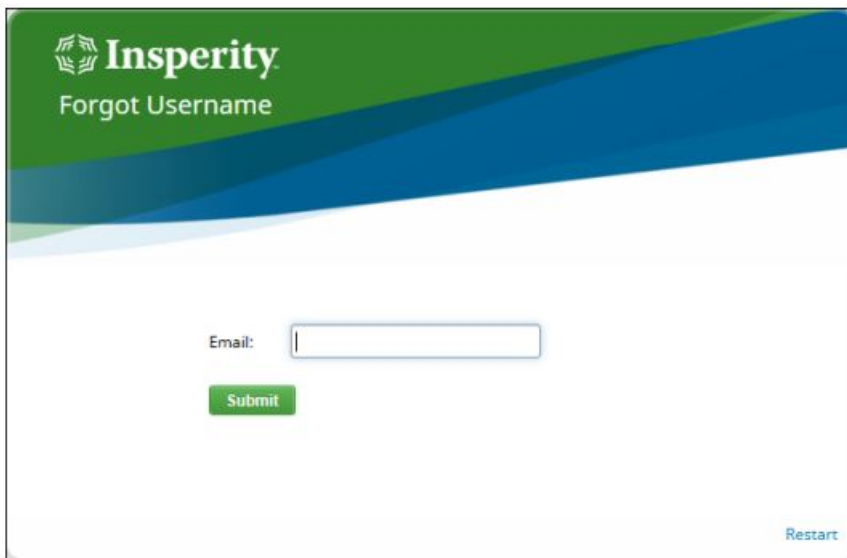8. Close the screen.

## Addressing Sign-On Issues

The following sections will help you reset your password or username should you forget them.

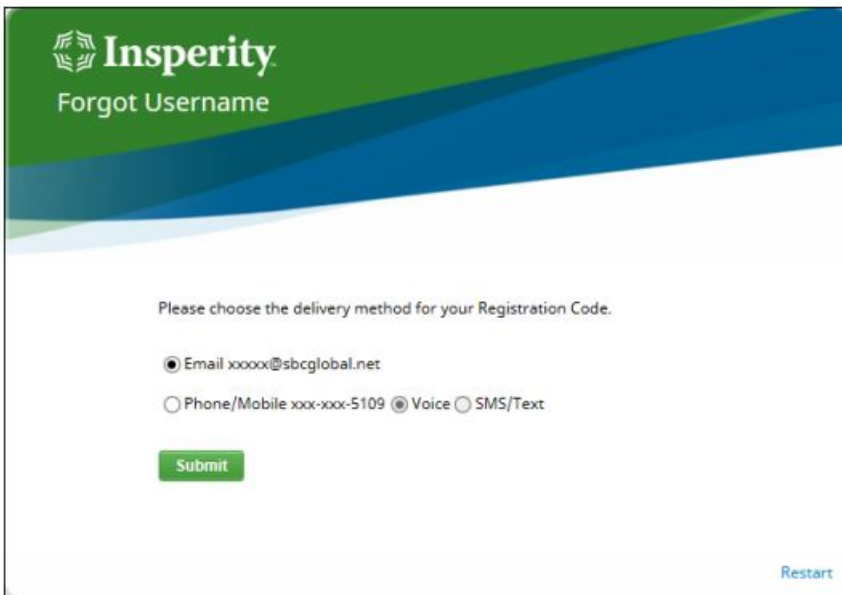**Retrieving a Forgotten Username**
If you have forgotten your username:

1. From the Insperity Portal Login screen, click the Forgot Username? link.
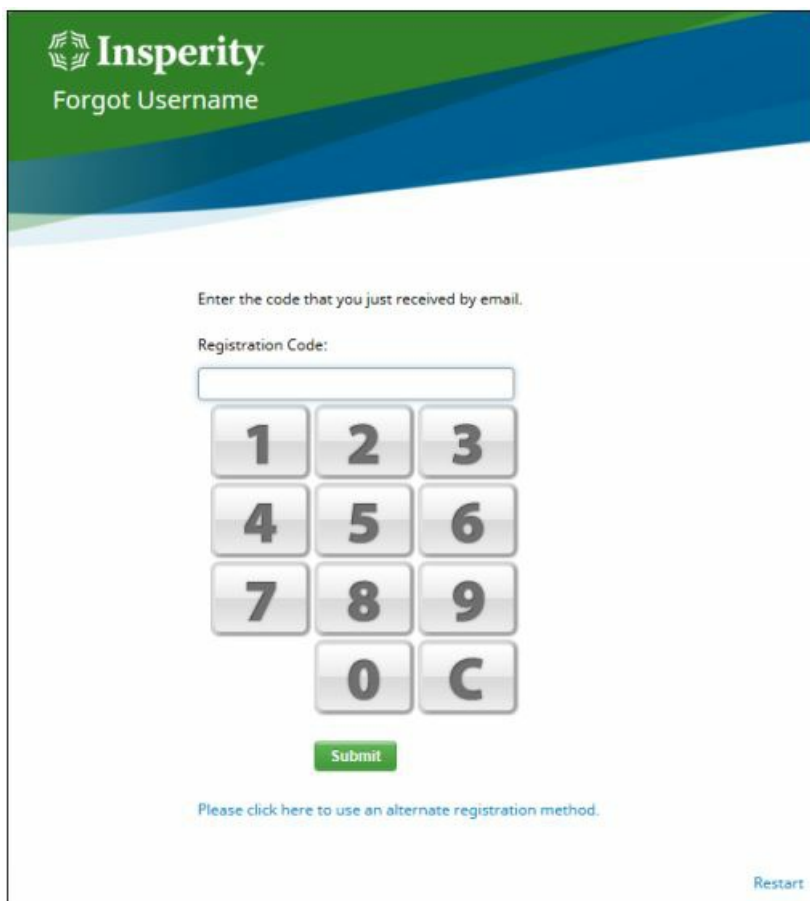   The Insperity Forgot Username screen displays.

2. Enter your contact email on file.
   NOTE: Do not enter your username email.
3. Click Submit.
   The Insperity Forgot Username screen updates.



**NOTE:** If you did not enter a phone number in your initial setup, you will not be given a Phone/Mobile option.

4. Select which method you want to reset your password:
   - Email – a code is sent to your Passport email on file.
   - Phone/Mobile with the voice option – you will receive a recorded call with the code on your phone that is on file.
   - Phone/Mobile with the SMS/Text option – you will receive a written message with the code on your phone that is on file.
5. Click Submit.
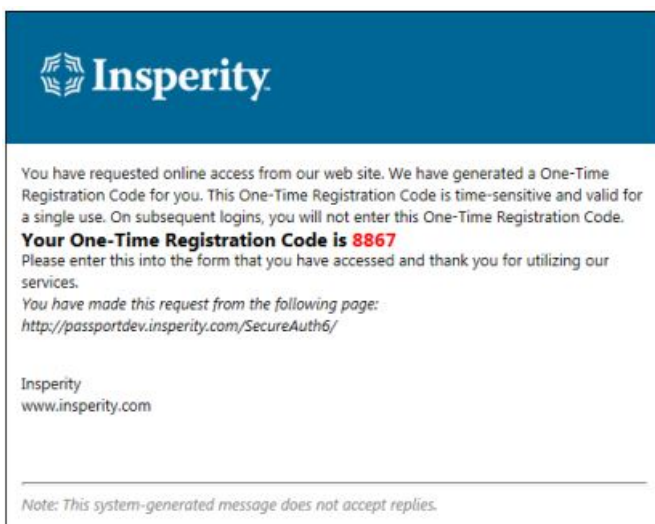   The Registration Code entry screen displays.

6. Retrieve the code from your email or phone.
   **NOTE:** Use the "C" key to clear your entry if needed.
   If you selected Email, you will get a message like the following:



   If you selected Phone/Mobile, you will get either a phone call or a message on the phone on file.

7. Enter the code using the buttons on the screen or your keyboard.
8. Click Submit.
   The screen updates and displays your username.

Your username is: lison.jack@cson.com

Click here to log in.

Restart
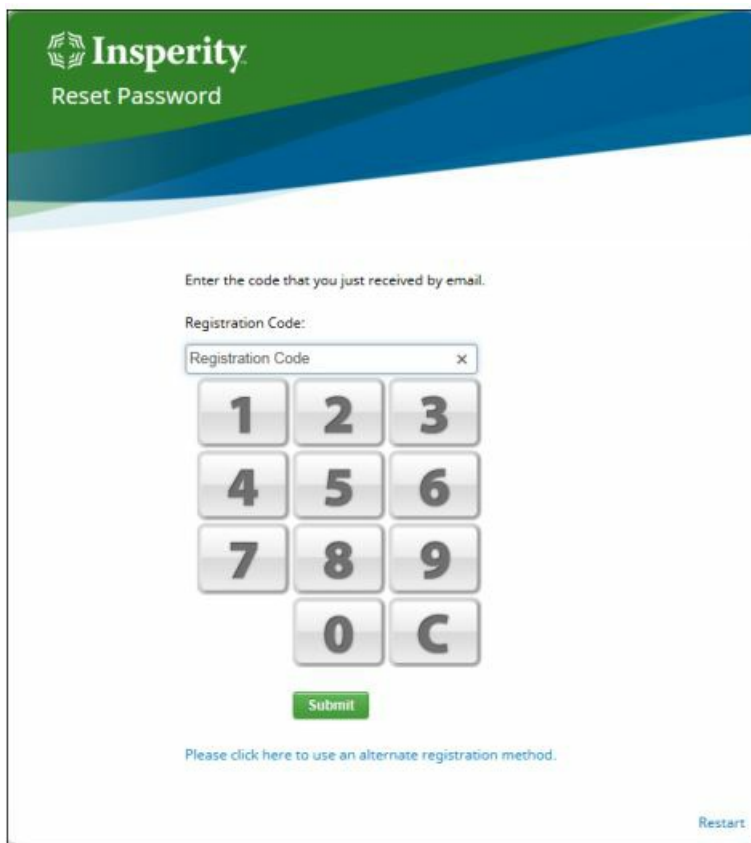
9. Click the Click here to log in link to sign on.

**Resetting a Forgotten Password**
To reset your password:

1. From the login page, click the Forgot Password? link under the Password field.
   The Insperity Reset Password screen displays.



Please enter your Username below.

Username: [ ]

Submit

Restart

2. Enter your Username.
3. Click Submit.
   The Insperity Reset Password screen updates.
   NOTE: If you did not enter a phone number in your initial setup, you will not be given a Phone/Mobile option.
4. Select which method you want to reset your password:
   - Email – a code is sent to your Passport email on file.
   - Phone/Mobile with the voice option – you will receive a recorded call with the code on your phone that is on file.
   - Phone/Mobile with the SMS/Text option – you will receive a written message with the code on your phone that is on file.
   - Knowledge-Based Questions – you are required to answer your security questions.
5. Click Submit.
   If you selected:
   - Email or Phone/Mobile, the Registration Code entry screen displays.
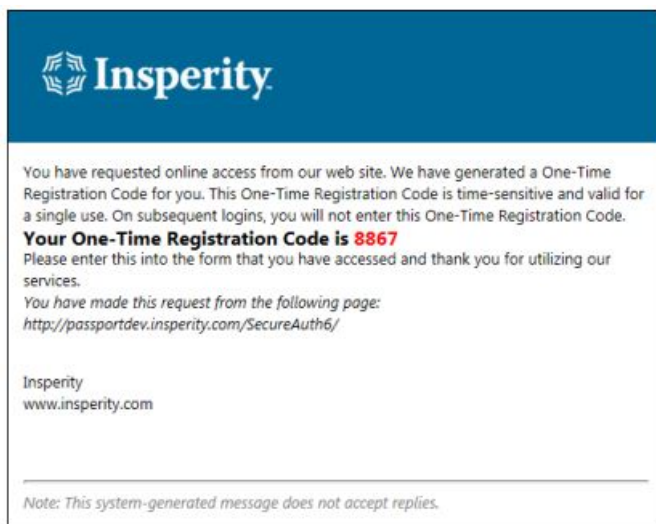   - If you selected Knowledge-Based Questions skip to step 11.

6. Retrieve the code from your email or phone.
   **NOTE:** Use the "C" key to clear your entry if needed.
   If you selected Email, you will get a message like the following:



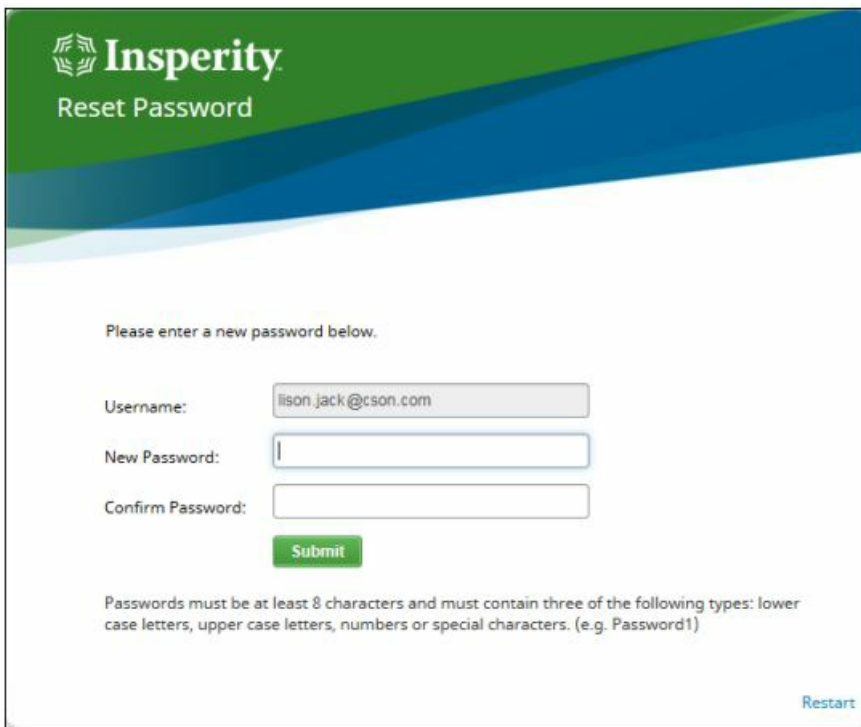   If you selected Phone/Mobile, you will get either a phone call or a message on the phone on file.

7. Enter the code using the buttons on the screen or your keyboard.
8. Click Submit.
   The screen updates to allow you to enter your new password.

9. Enter and confirm your new password.
10. Click Submit.
    A message displays indicating your password was changed successfully.
    **NOTE:** An email is sent to your contact email on file indicating that your password has been changed.
11. If you elected to answer the security questions, the Insperity Reset Password screen updates.



12. Answer your security questions.
13. Optionally, you can check the Hide Answers checkbox to view or hide the answer text.
14. Click Submit.
    If your answers are correct, the screen updates to allow you to enter your new password.
15. Enter your new password.
16. Click Submit.
    **NOTE:** An email is sent to your contact email on file indicating that your password has been changed.

## Troubleshooting

IMPORTANT: If you experience issues, it is a good practice to clear your browser's cache and cookies. For instructions on this, see the Clearing the Browser's Cache and Cookies on page 20.

If you are unable to successfully create/sign on with your new Passport account, review the following.

**At Setup: Step 1. Identify**

Error:
> ❌ The information you provided does not match our database. Please re-enter, or contact your Administrator.

**If you receive this error, check the following:**

- Confirm with your administrator that the last 4 digits of your social security number, your Date of Birth, and your Last Name match exactly how they appear in your employee master record.
- If your last name includes special characters, such as hyphenated last name, confirm the same type of hyphenation you entered is the same as the one used in the employee master record.
- Confirm you have not had a name change since you were first hired on.
- Confirm you have not created another Insperity Passport for another client.

**At Setup: Step 2. Create**

Error:
> ❌ We are unable to create your Passport at this time

This error may indicate the Passport system is offline. Have your onsite administrator contact your Insperity support representative.

Error:
> Username * | knguyen@demo.com | ❓ knguyen@demo.com is Not Available

This error indicates that the email you are attempting to use is already in use. Emails must be unique.

**At Sign On**

Error:
> Log In failed. Invalid Username / Password. Please try again.

This error indicates you have entered the wrong username, password, or both. Recheck your entries and try again. You can also use the Forgot Username? and/or Forgot Password? links.

Error:
> You have exceeded the maximum number of login attempts. Please close your browser and try again.

Error:
> This account has been locked. Please use the Forgot Password link above or contact your Administrator to reset your password and unlock your account.

If you attempt more than five invalid logins, your account gets locked. You can use the Forgot Password? link or contact your company administrator to reset it.

**Clearing the Browser's Cache and Cookies**

When first working with, setting up, and troubleshooting single sign-on, it is a good idea to clear your browser's cache and remove any cookies. Use the steps below for your particular browser.

**Microsoft Internet Explorer**

1. From the main menu bar, click Tools > Delete browsing history…
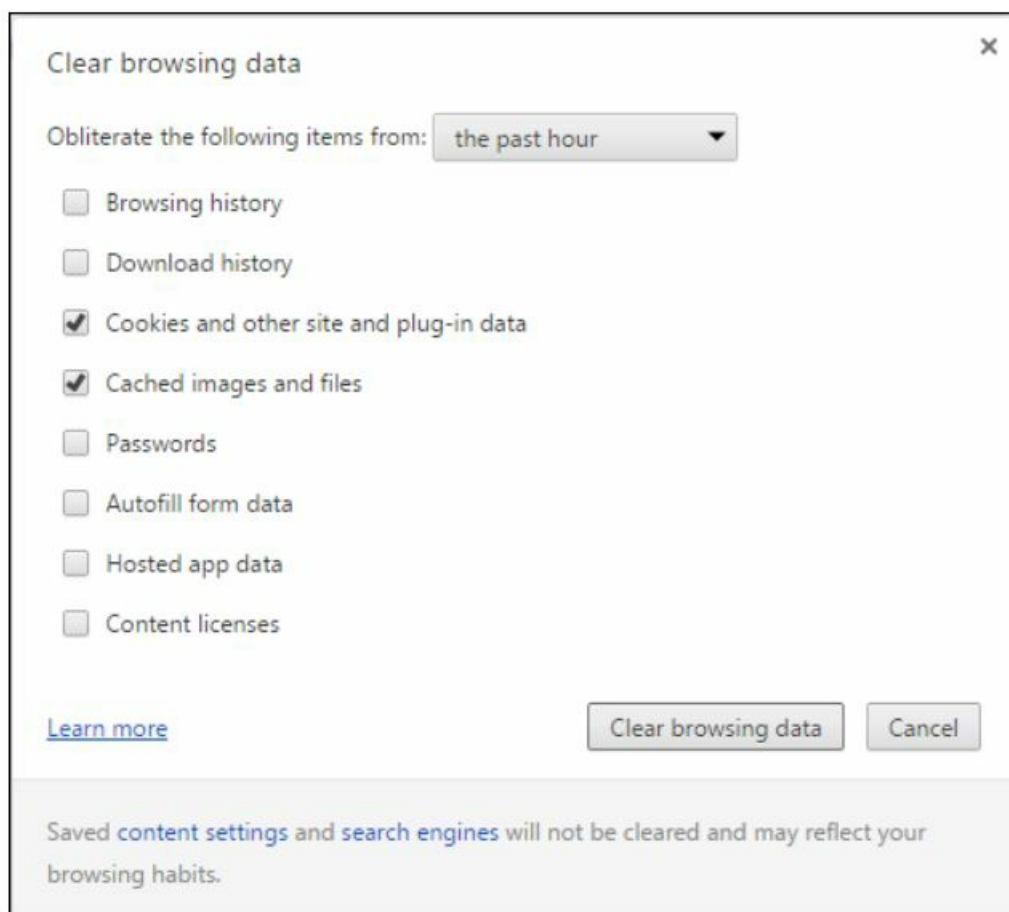   The Delete Browsing History window displays.
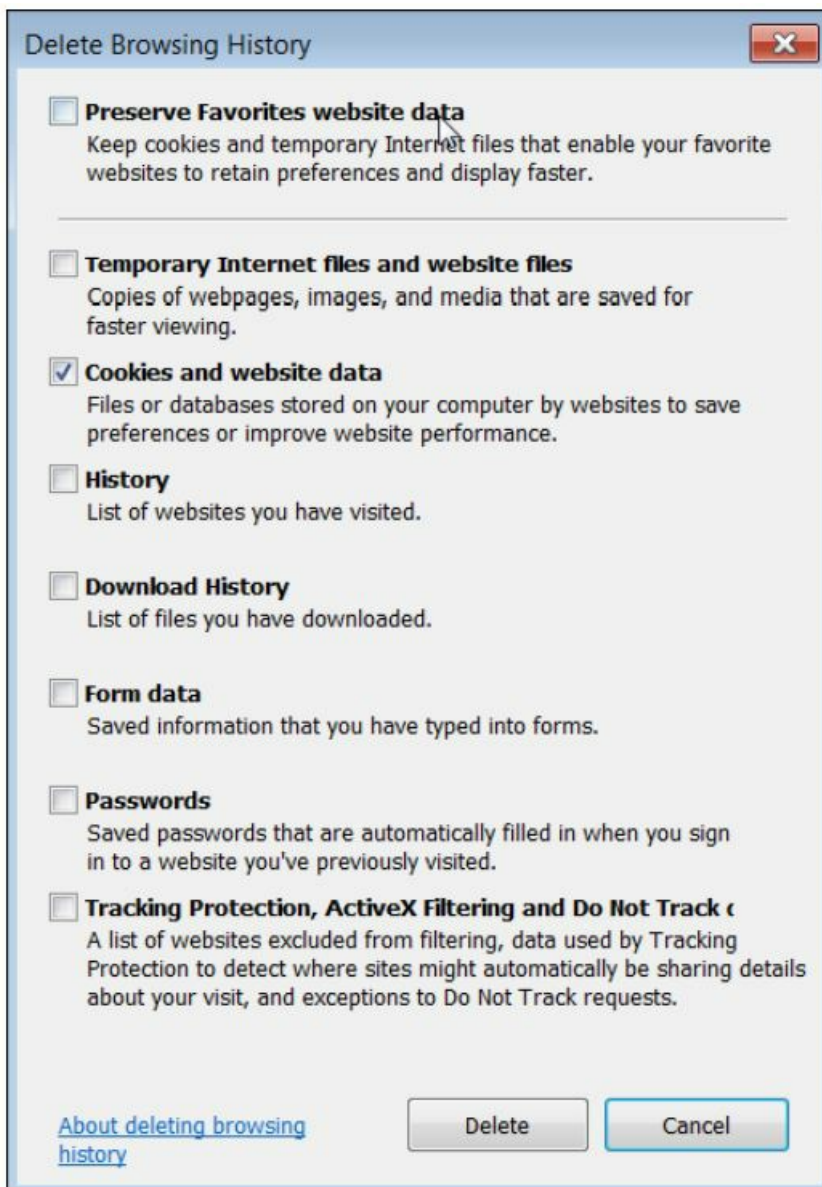
2. Confirm Cookies and website data is checked. All other selections can be left unchecked.
3. Click Delete.

**Google Chrome**

1. Click the Chrome menu icon in the upper right-hand corner of the browser. This displays the menu.
2. Click More tools > Clear browsing data…
   This displays the Clear browsing data window.

3. Select Cookies and other site and plug-in data and Cached images and files. All other selections can be left unchecked.
4. Click Clear browsing data.

**Mozilla FireFox and Apple Safari**
For instructions on clearing the cache and cookies on these two browsers, visit their respective support websites.
**Mozilla FireFox: https://support.mozilla.org/en-US/**
**Apple Safari: http://help.apple.com/safari/mac/8.0/#/**

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