Workforce

SDSURF Electronic Time & Attendance System

Supervisor User Guide for **Principal Investigators**

Links to system:

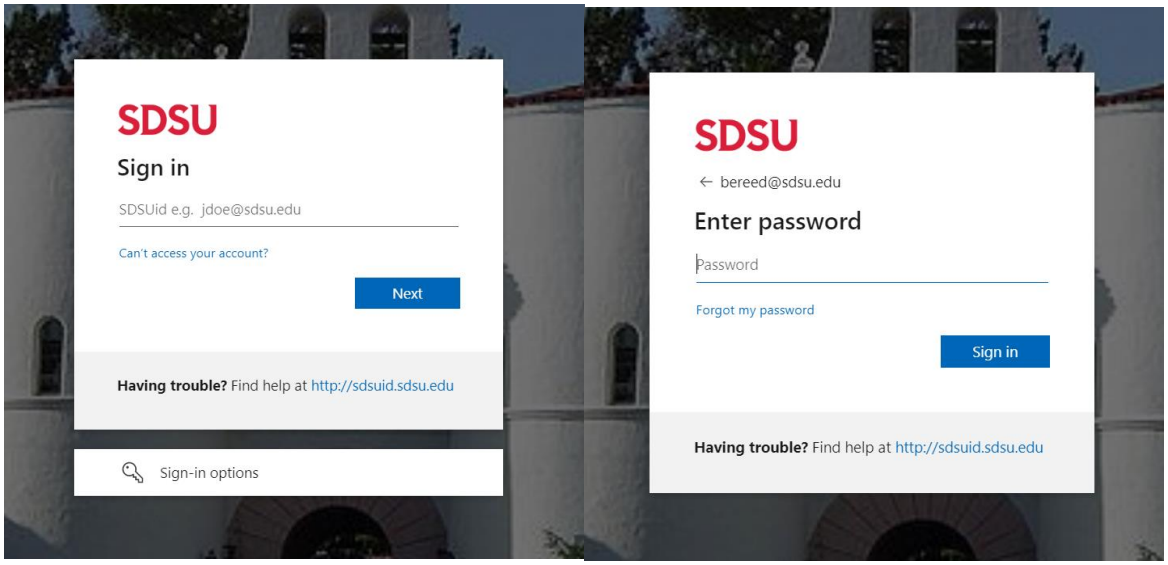
Main Login
https://sdsurf.wta-us8.wfs.cloud/workforce/SSO.do

Mobile Login
https://sdsurf.wta-us8.wfs.cloud/workforce/SSO.do?Page=Mobile

Accessible Login
https://sdsurf.wta-us8.wfs.cloud/workforce/SSO.do?Page=Accessibility

Signing on:

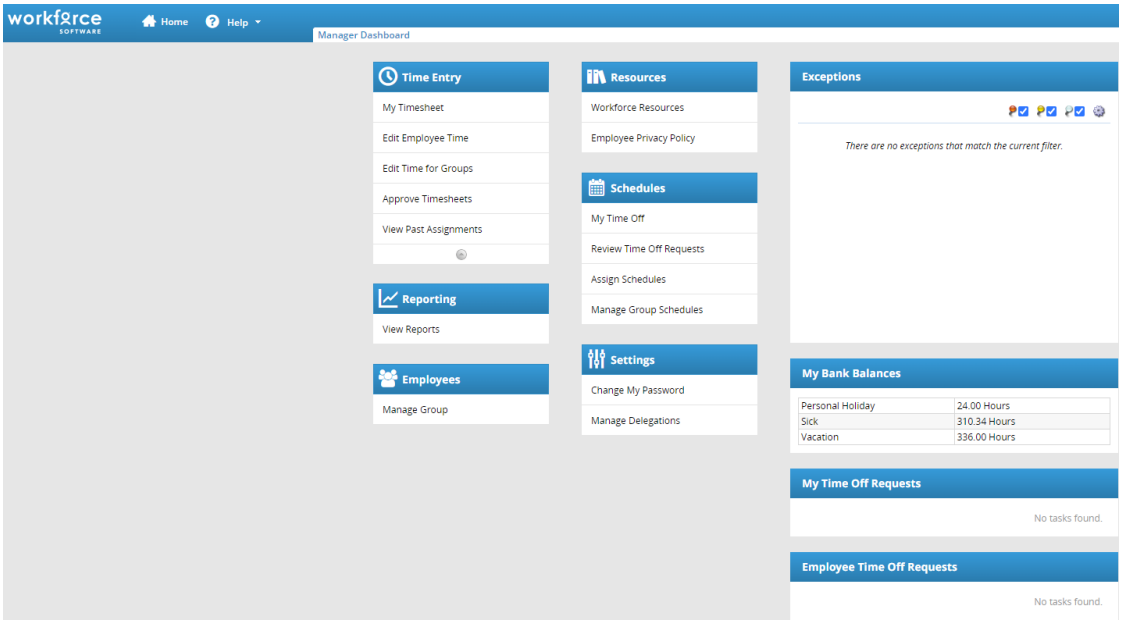
Beginning May 26, you will be able to log in to WorkForce with your SDSUid credentials (e.g. jdoe1234@sdsu.edu). The R+RedID user IDs will be retired and you will no longer need to maintain and secure separate credentials.



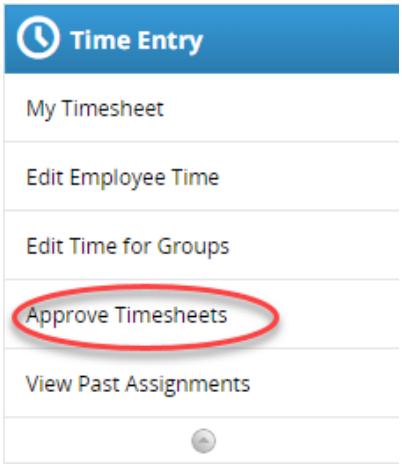
SUPERVISOR ROLE:

As a supervisor you may edit and/or approve your employees' time sheets in Workforce. Upon signing into the system, you are directed to the main screen, or dashboard.

Supervisor Dashboard:



The supervisor role includes reviewing and approving employee time sheets. Access to time sheets submitted by your employees is under the "Time Entry" section on the Dashboard



"Edit Employee Time" allows you to review and edit a time sheet for an individual employee

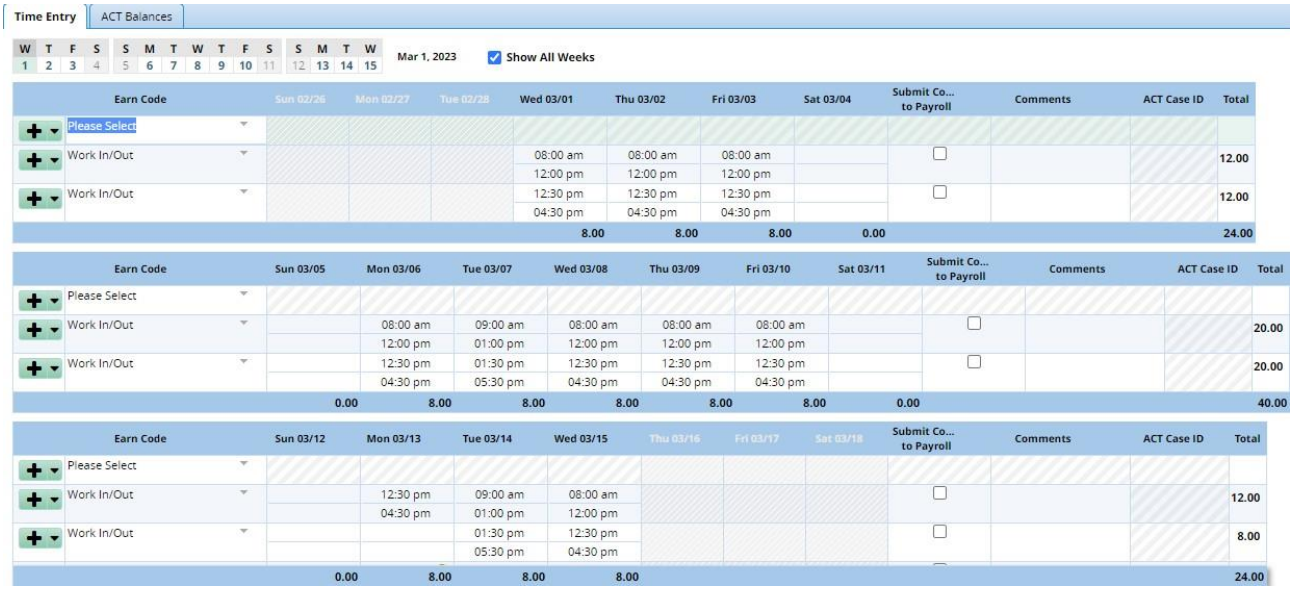
"Edit Time for Groups" allows you to review and edit time sheets for groups of employees under your supervision

"Approve Employee Time Sheets" allows you to approve employee time sheets.

Utilizing the "Approve Time Sheets" button will bring up a second screen that lists the employees (or groups) under your supervision.

Click on the assignments line. If you have multiple employees or groups, you can choose the group or employee by clicking on the employee's or group's name.

Clicking on an employee's name will retrieve their detailed time sheet.
Sample employee time sheet



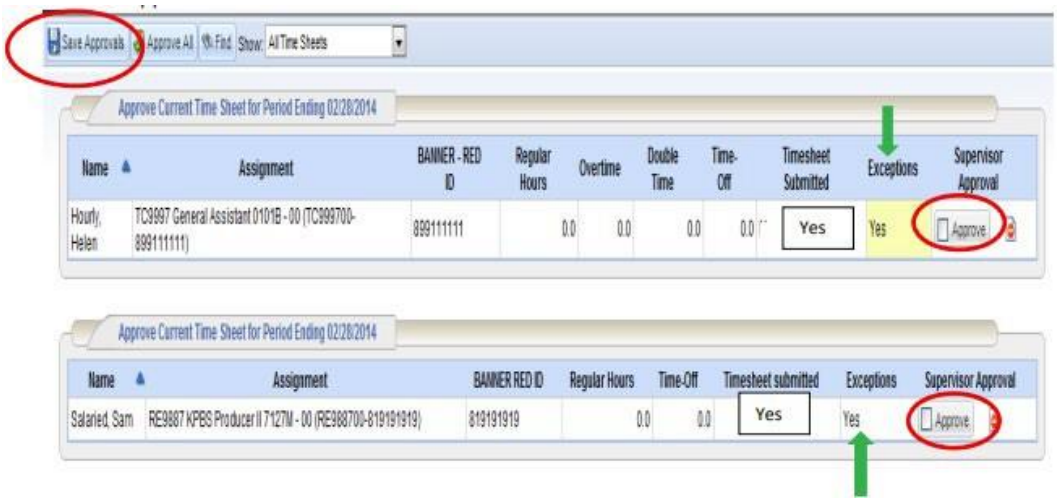
Clicking on the group name will access the Approve Current Time Sheet window.

The names of the employees in your group will be listed on this screen. If you have multiple exempt and non-exempt employees, there will be two groupings of employees. The upper group will contain all of your exempt employees and the lower group all of your non-exempt/hourly employees.

The time sheet submitted box should reflect "YES" – as employees must submit time sheets to their supervisor before the time sheet can be approved. (*If it has not been submitted by the employee the field will show "No" and be highlighted in red.*)

From the summary screen, you can access an individual employee's time sheets by clicking anywhere on the employee's row.

<u>APPROVE</u> time sheets by clicking on the ""Approve" box as shown above and then hit the "Save Approvals" button to save the approvals.



Note: if an employee's time sheet indicates errors or exceptions these should be addressed prior to approving. Yellow coded exceptions may or may not need correction. Red coded exceptions must be corrected.

Exception messages are color-coded to identify the level of severity:

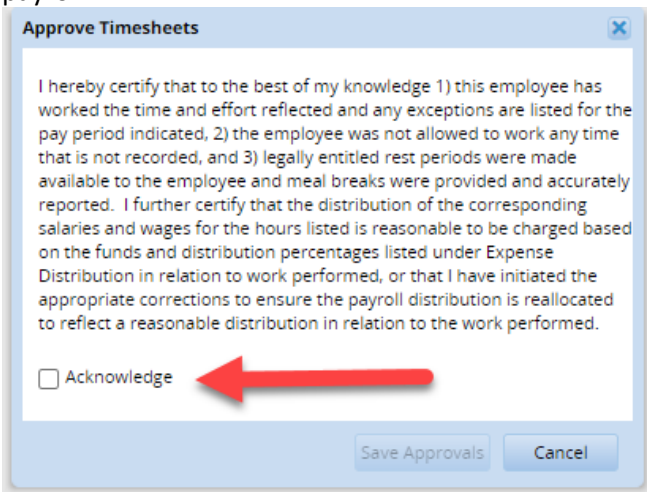
- **White**: No exceptions or only informational messages present
- **Yellow**: Warnings present
- **Red**: Errors present (employee cannot save or submit time sheet with a red error code)

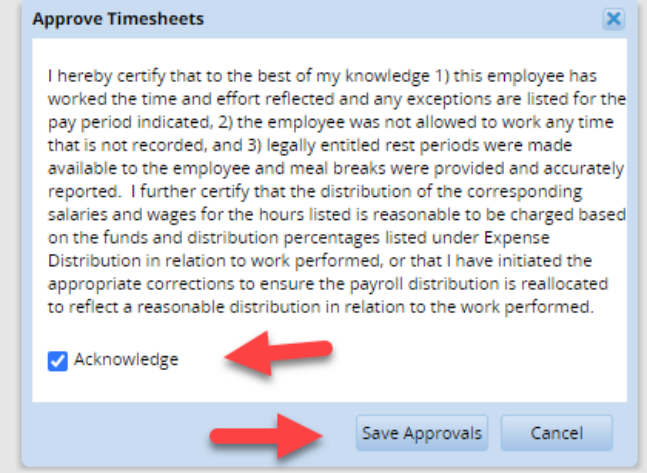
Errors should be reviewed prior to approving an employee's time sheet.

<u>Supervisor's Certification</u>:

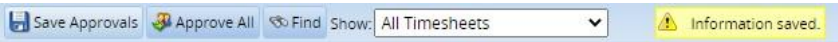
Once you've approved the time sheet(s) and clicked on "Save Approvals," the supervisor's certification window will appear:

Acknowledge that you have read and agree to the certification statement by clicking on the "Acknowledge" box, and then click on the "Save Approvals" box to submit the approved time sheets to payroll.



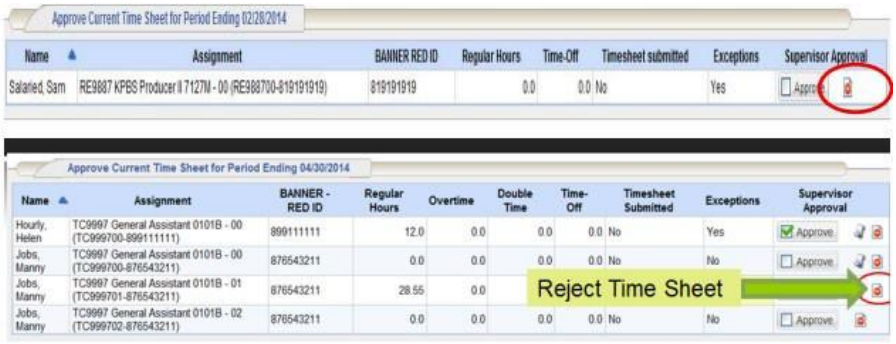


The summary screen will reflect that the approvals have been saved:



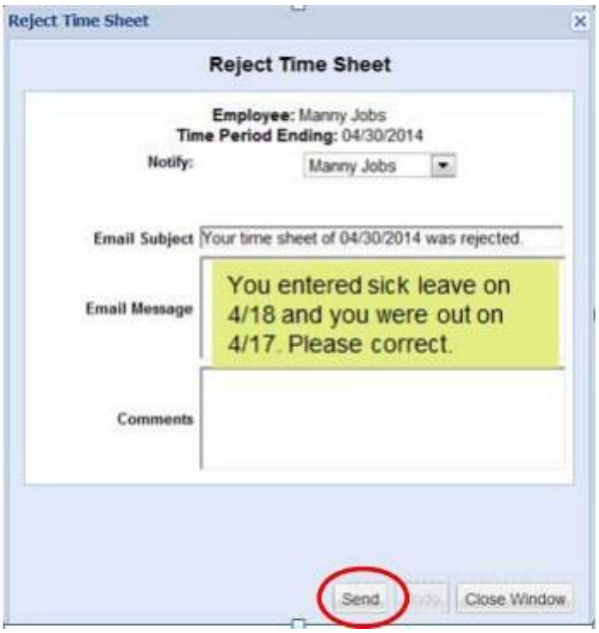
REJECT

For time sheets that are incorrect or incomplete, a supervisor can reject a time sheet by clicking on the reject button which is located to the far right of the line.



The “Reject Time Sheet” window will appear where the reason for the rejection should be noted. Click the “Send” button to complete the process. This will send an email alert to the employee who will need to amend the time report and resubmit for approval.

It’s helpful to include information in the body of the email (“Email Message” box) by specifically addressing why the time sheet is being rejected.



The employee must then access their time sheet, correct the error, save, and then resubmit their time sheet. You will be notified when the time sheet has been submitted. Once the change has been made and the time sheet is submitted, the time sheet should be reviewed and if accurate, approved.

Points to consider while reviewing employee time sheets for approval or rejection:

Exempt employees: Similar to the paper time reports previously submitted - exempt employees will be logging only exceptions to their regular time. (I.E. time off – vacation, sick, jury duty, leaves etc.)

Non-exempt (hourly) employees: Will be logging work in and out times (work start/end as well as lunch/meal breaks if applicable) rather than the number of hours worked that day. The system will automatically calculate the number of hours worked as well as paid time off (if applicable to the employee's job classification.)

ZERO hours- time sheets If an hourly/non-exempt employee did not work any hours during the pay period, the time sheet should still be submitted without any hours logged. It's not necessary for the employee to submit their time sheet but the supervisor should approve and submit the time sheet without any time logged.

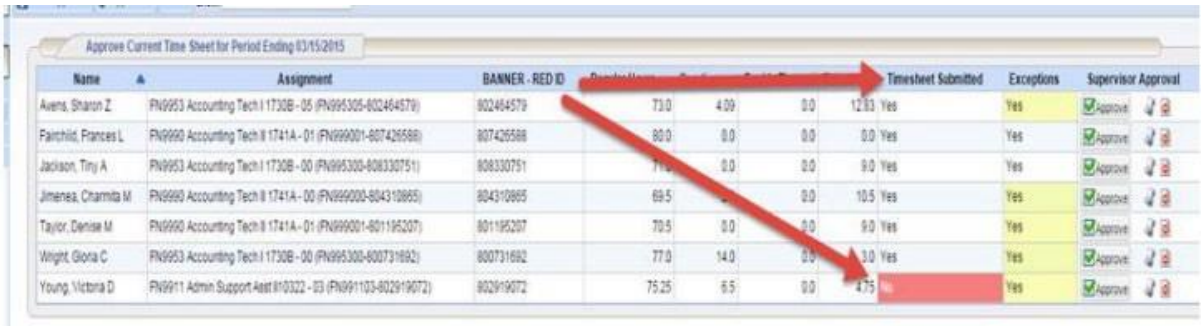
Time Sheet Comments

Supervisors can submit notes and changes to Payroll on the employee's time report. Examples when this functionality would be appropriate include if there are overtime hours which should post to a different fund; if an employee is setup on the wrong fund; or if a different fund distribution is needed for the time sheet.

Supervisor should write the comment in the "Comments" field and click the "Submit Comments to Payroll box."

Supervisor Summary Window

When a group of employees is viewed, a supervisor can, at a glance, determine whether or not employees have submitted their time sheets. In the example below, one of the employees in the group has not yet submitted their time sheet.



Supervisors must not approve time sheets that haven't been submitted by the employee. Note the "Timesheet Submitted" column reflects the last employee in the list has not yet submitted their time sheet by a red highlighted "No" in the column.

DELEGATING AUTHORITY

Delegation is the act of granting someone else authority to review/approve time sheets for your employees, typically when you are not available to review and approve.

1. Supervisors must delegate to an individual who is trained to review and certify time sheets for employees.
2. Delegation can be granted to another individual for a specific group of employees on an on-going basis.

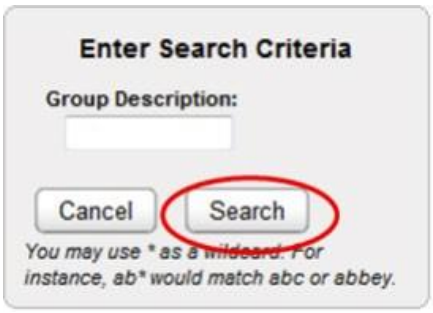
3. Delegation can also be given for a set period of time (e.g. while supervisor is out of the office.)

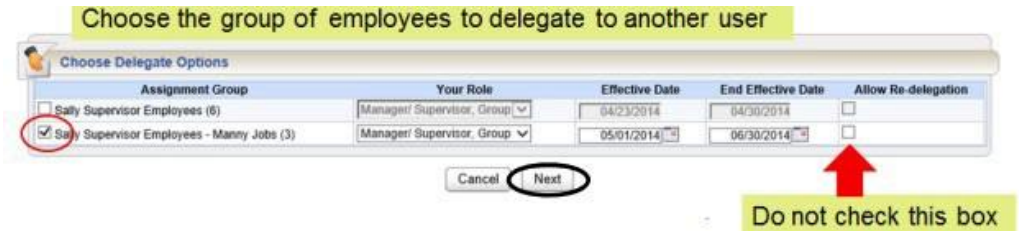
4. An employee cannot approve their own time sheet.

From the "Settings" section of your Dashboard click on "Manage Delegations"

This will bring up a secondary screen – click on “Delegate Authority”

This will bring up a search screen – simply click on the “Search” button and it will retrieve a list of all groups set up with you as named supervisor.





Click on the box which contains the group you wish to delegate.

Enter the date the delegation is effective and the end date. If you wish to keep the delegation of authority on an ongoing basis, use 12/31/3000 as the end date.

Then click on the “Next” button.

This will bring up the screen where you indicate the person to whom you are delegating authority to approve time sheets. Note: you cannot delegate authority to an individual to approve their own time sheet. The delegation should be to someone who has had training on how to review/approve time

sheets and has a “Supervisor Agreement” form on file with SDSURF.

Enter the first and last name of the person to whom you wish to delegate authority. Then hit the “Search” button.

This should bring up a list of names.

If there are multiple names – click on the circle to the left of the name and then click on the “Select” button.

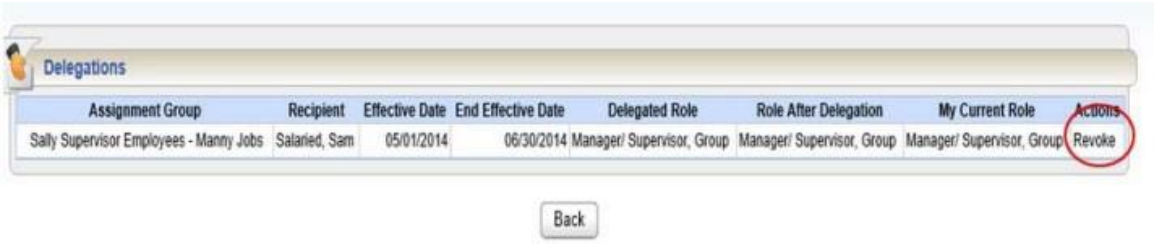
<u>Revoking Delegation of Authority</u>

Under “Settings” click on the “Manage Delegations” button.

Then click on “View/Revoke Delegations.”

This will bring up a search screen – enter the pertinent information and then click on the “Search” button.

Simply click on the “Revoke” (or “Revoke All” if applicable) button.



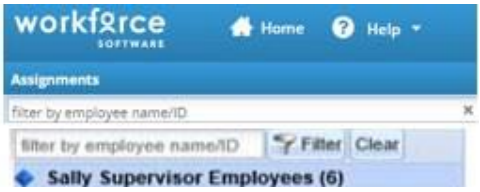
Enter the date the revocation is effective and click on the “Confirm” button.

Managing Groups in Workforce

If you supervise multiple employees, it may be helpful to place employees in separate groups to facilitate time sheet review and/or delegation of authority.

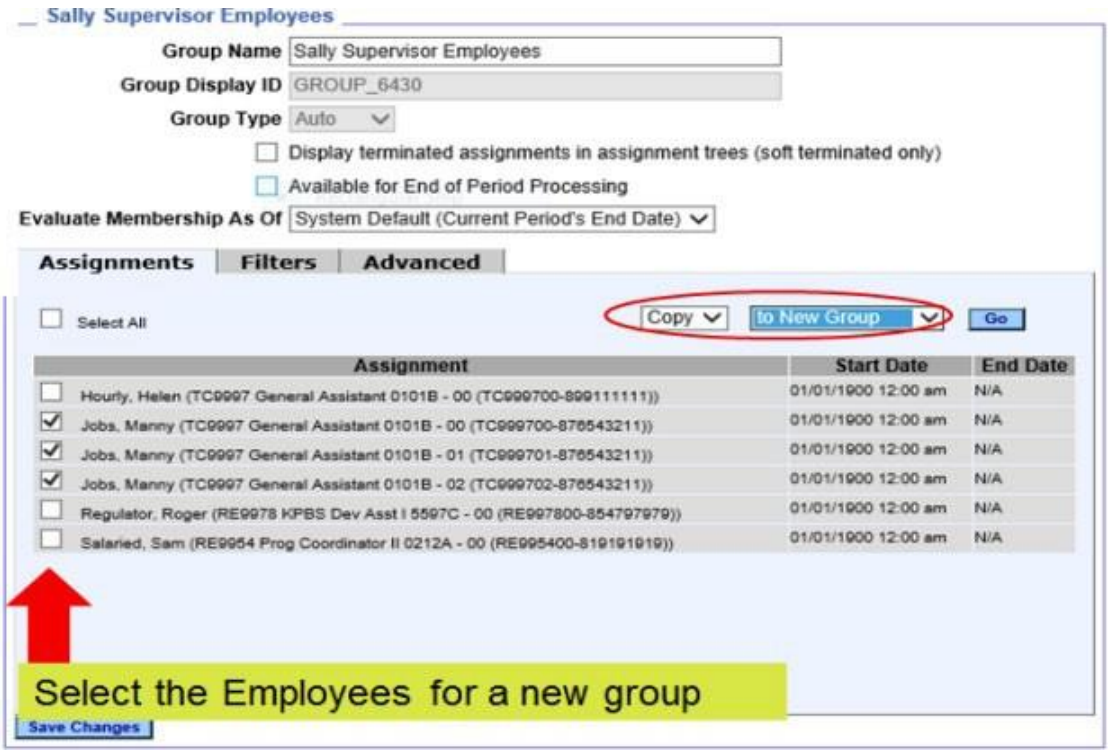
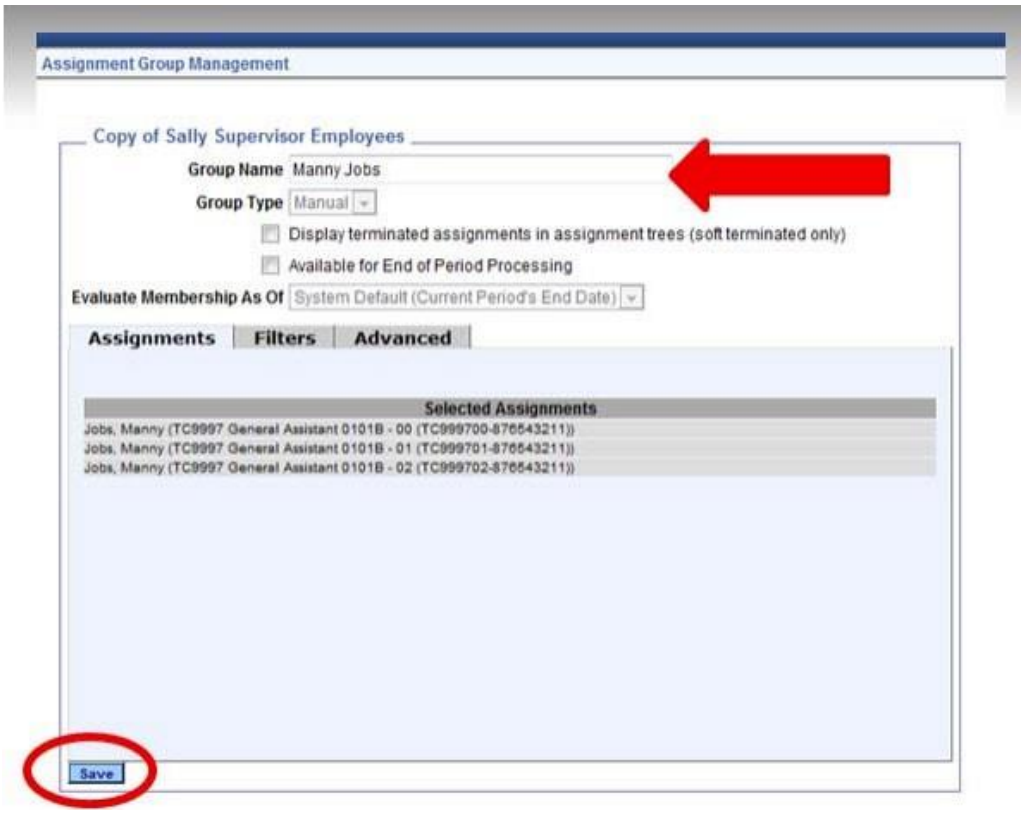
Select “Manage Group” from the dashboard.

This will bring up an “Assignments” screen listing the group(s) of employees whom you supervise:



Click on the group name to bring up a screen with all the employees in the group.

Select employees you wish to place in a new group by clicking on the box to the left of the employee’s name. From the drop down menus choose “Copy” and “to New Group” and then hit “Go”



Then change the Group Name (will initially show as “Copy of…”) and then hit “Save.”