

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

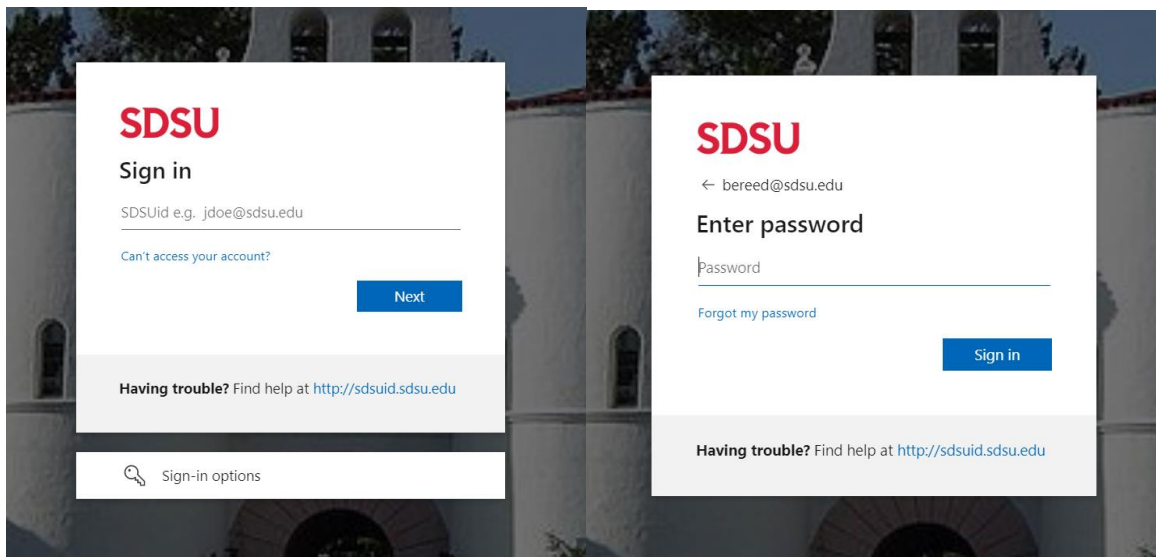
<https://sdsurf.wta-us8.wfs.cloud/workforce/SSO.do?Page=Mobile>

Accessible Login

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

Signing on:

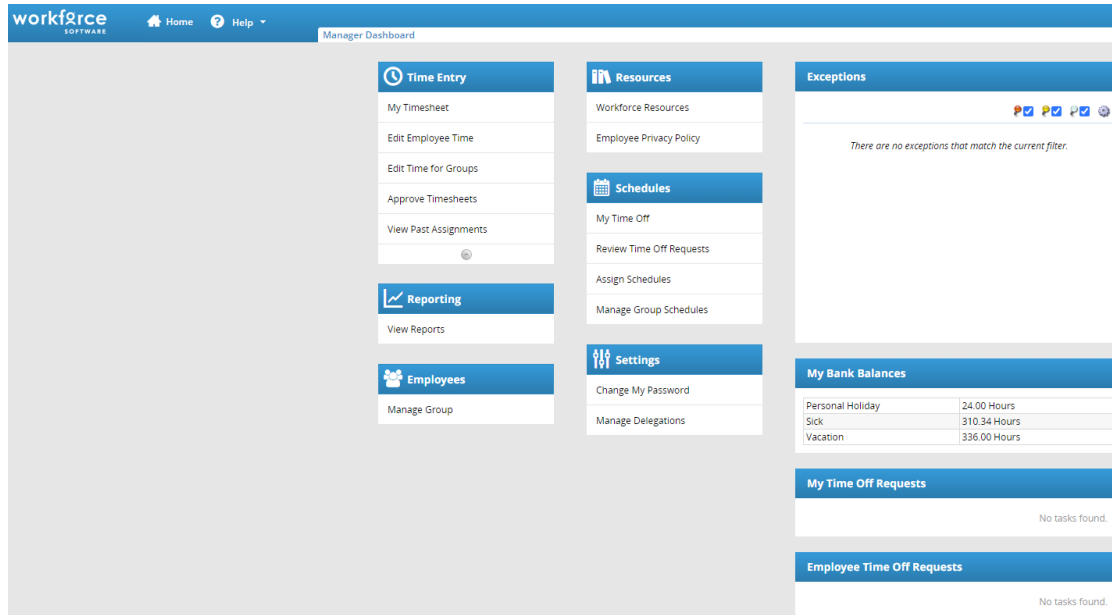
Beginning May 26, you will be able to log in to WorkForce with your SDSUId credentials (e.g. jdoe1234@sdsu.edu). The R+RedID user IDs will be retired and you will no longer need to maintain and secure separate credentials.



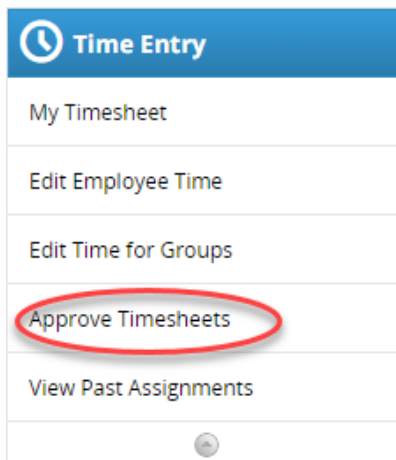
SUPERVISOR ROLE:

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

Time Entry		ACT Balances																
W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	Mar 1, 2023		<input checked="" type="checkbox"/> Show All Weeks	
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15				
Earn Code		Sun 02/26	Mon 02/27	Tue 02/28	Wed 03/01	Thu 03/02	Fri 03/03	Sat 03/04	Submit Co... to Payroll	Comments	ACT Case ID	Total						
<input type="checkbox"/>	Please Select								<input type="checkbox"/>									
<input type="checkbox"/>	Work In/Out				08:00 am 12:00 pm	08:00 am 12:00 pm	08:00 am 12:00 pm		<input type="checkbox"/>			12.00						
<input type="checkbox"/>	Work In/Out				12:30 pm 04:30 pm	12:30 pm 04:30 pm	12:30 pm 04:30 pm		<input type="checkbox"/>			12.00						
					8.00	8.00	8.00	0.00				24.00						
Earn Code		Sun 03/05	Mon 03/06	Tue 03/07	Wed 03/08	Thu 03/09	Fri 03/10	Sat 03/11	Submit Co... to Payroll	Comments	ACT Case ID	Total						
<input type="checkbox"/>	Please Select								<input type="checkbox"/>									
<input type="checkbox"/>	Work In/Out		08:00 am 12:00 pm	09:00 am 01:00 pm	08:00 am 12:00 pm	08:00 am 12:00 pm	08:00 am 12:00 pm		<input type="checkbox"/>			20.00						
<input type="checkbox"/>	Work In/Out		12:30 pm 04:30 pm	01:30 pm 05:30 pm	12:30 pm 04:30 pm	12:30 pm 04:30 pm	12:30 pm 04:30 pm		<input type="checkbox"/>			20.00						
		0.00	8.00	8.00	8.00	8.00	8.00	8.00	0.00			40.00						
Earn Code		Sun 03/12	Mon 03/13	Tue 03/14	Wed 03/15	Thu 03/16	Fri 03/17	Sat 03/18	Submit Co... to Payroll	Comments	ACT Case ID	Total						
<input type="checkbox"/>	Please Select								<input type="checkbox"/>									
<input type="checkbox"/>	Work In/Out		12:30 pm 04:30 pm	09:00 am 01:00 pm	08:00 am 12:00 pm				<input type="checkbox"/>			12.00						
<input type="checkbox"/>	Work In/Out			01:30 pm 05:30 pm	12:30 pm 04:30 pm				<input type="checkbox"/>			8.00						
		0.00	8.00	8.00	8.00							24.00						

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.)

Approve Current Time Sheet for Period Ending 03/15/2014									
Name	Assignment	BANNER RED ID	Regular Hours	Time-Off	Timesheet submitted	Exceptions	Supervisor Approval		
Salaried, Sam	RE9887 KPBS Producer II 7127M-00 (RE988700-819191919)	819191919	0.0	0.0	Yes	Yes	<input type="checkbox"/> Approve		

Approve Current Time Sheet for Period Ending 03/15/2014									
Name	Assignment	BANNER - RED ID	Regular Hours	Overtime	Double Time	Time-Off	Timesheet Submitted	Exceptions	Supervisor Approval
Regulator, Roger	RN9984 Inst Supt Asst II 1578A-00 (RN998400-051797979)	051797979	0.0	0.0	0.0	0.0	Yes	Yes	<input type="checkbox"/> Approve

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

APPROVE 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:

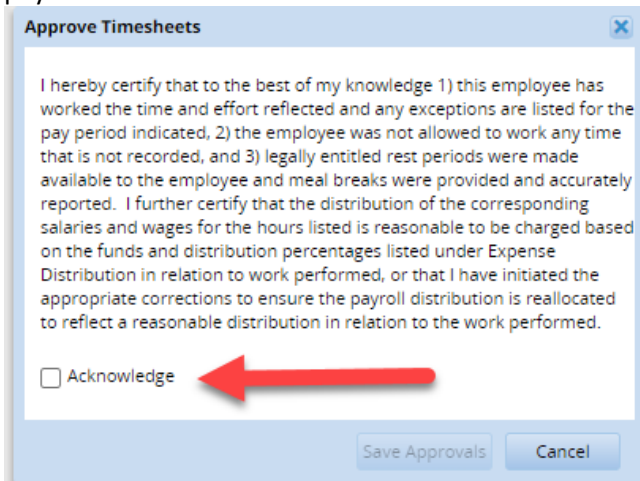
- **White:** No exceptions or only informational messages present
- **Yellow:** Warnings present
- **Red:** Errors present (employee cannot save or submit time sheet with a red error code)

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

Supervisor’s Certification:

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.



Approve Timesheets

I hereby certify that to the best of my knowledge 1) this employee has worked the time and effort reflected and any exceptions are listed for the pay period indicated, 2) the employee was not allowed to work any time that is not recorded, and 3) legally entitled rest periods were made available to the employee and meal breaks were provided and accurately reported. I further certify that the distribution of the corresponding salaries and wages for the hours listed is reasonable to be charged based on the funds and distribution percentages listed under Expense Distribution in relation to work performed, or that I have initiated the appropriate corrections to ensure the payroll distribution is reallocated to reflect a reasonable distribution in relation to the work performed.

Acknowledge

Save Approvals Cancel

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

Save Approvals Approve All Find Show: All Timesheets Information 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.

Approve Current Time Sheet for Period Ending 02/28/2014										
Name	Assignment	BANNER RED ID	Regular Hours	Time-Off	Timesheet submitted	Exceptions	Supervisor Approval			
Salatid, Sam	RE3887 KPBS Producer I 7127N - 01 (RE388700-819191919)	819191919	0.0	0.0	No	Yes	<input type="checkbox"/> Approve	<input type="checkbox"/> Reject	<input type="checkbox"/> Cancel	<input type="checkbox"/> Send

Approve Current Time Sheet for Period Ending 04/30/2014										
Name	Assignment	BANNER RED ID	Regular Hours	Overtime	Double Time	Time-Off	Timesheet Submitted	Exceptions	Supervisor Approval	
Hourly, Helen	TC9997 General Assistant 0101B - 00 (TC999700-899111111)	899111111	12.0	0.0	0.0	0.0	No	Yes	<input checked="" type="checkbox"/> Approve	<input type="checkbox"/> Reject
Jobs, Manny	TC9997 General Assistant 0101B - 00 (TC999700-876543211)	876543211	0.0	0.0	0.0	0.0	No	No	<input type="checkbox"/> Approve	<input type="checkbox"/> Reject
Jobs, Manny	TC9997 General Assistant 0101B - 01 (TC999701-876543211)	876543211	28.55	0.0					<input type="checkbox"/> Approve	<input checked="" type="checkbox"/> Reject Time Sheet
Jobs, Manny	TC9997 General Assistant 0101B - 02 (TC999702-876543211)	876543211	0.0	0.0	0.0	0.0	No	No	<input type="checkbox"/> Approve	<input type="checkbox"/> Reject

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.”

Earn Code	Sun 04/13	Mon 04/14	Tue 04/15	Wed 04/16	Thu 04/17	Fri 04/18	Sat 04/19	Submit C... to Payroll	Comments	ACT Ca..	Total
Work In/Out				06:30 am 12:00 pm	08:33 am 12:00 pm	08:25 am 11:58 am					10.55
				3.50	3.53	3.52	0.00				10.55

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.

Name	Assignment	BANNER - RED ID	Timesheet Submitted	Exceptions	Supervisor Approval
Avena, Sharon Z.	FN9953 Accounting Tech I 1730B - 05 (FN995305-802464579)	802464579	73.0 4.00 0.0 12.83	Yes	Approve
Fairchild, Frances L.	FN9990 Accounting Tech II 1741A - 01 (FN999001-807426588)	807426588	80.0 0.0 0.0 0.0	Yes	Approve
Jackson, Tim A.	FN9953 Accounting Tech II 1730B - 00 (FN995300-808330751)	808330751	71.0 0.0 0.0 9.0	Yes	Approve
Jimenez, Charmita M.	FN9990 Accounting Tech II 1741A - 00 (FN999000-804310865)	804310865	69.5 0.0 0.0 10.5	Yes	Approve
Taylor, Denise M.	FN9990 Accounting Tech II 1741A - 01 (FN999001-801195207)	801195207	70.5 0.0 0.0 9.0	Yes	Approve
Wright, Gloria C.	FN9953 Accounting Tech I 1730B - 00 (FN995300-800731892)	800731892	77.0 14.0 0.0 3.0	Yes	Approve
Young, Victoria D.	FN9911 Admin Support Asst II 10322 - 03 (FN991103-802919072)	802919072	75.25 6.5 0.0 4.75	Yes	Approve

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.

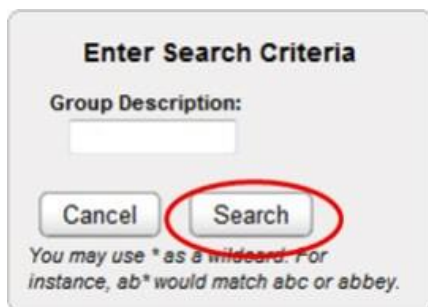
From the "Settings" section of your Dashboard click on "Manage Delegations"



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.



Choose the group of employees to delegate to another user



Do not check this box

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.

Search for Delegation Recipients

User ID:

First Name:

Last Name:

Max Results:

*You may use * as a wildcard. For instance, ab* would match abc or abbey.*

This should bring up a list of names.

Search Results

Name	First Name	Last Name
<input checked="" type="radio"/> Salaried, Sam	Sam	Salaried

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

Revoking Delegation of Authority

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

Then click on “View/Revoke Delegations.”

Manage Delegations

[Delegate Authority](#)

[View/Revoke Delegations](#)

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

Enter Search Criteria

Group Description:

First Name:

Last Name:

User ID:

As Of Date:

*You may use * as a wildcard. For instance, ab* would match abc or abbey.*

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

Delegations

Assignment Group	Recipient	Effective Date	End Effective Date	Delegated Role	Role After Delegation	My Current Role	Actions
Sally Supervisor Employees - Manny Jobs	Salaried, Sam	05/01/2014	06/30/2014	Manager/ Supervisor, Group	Manager/ Supervisor, Group	Manager/ Supervisor, Group	Revoke

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

Revoke Delegated Roles

Assignment Group	Recipient	Effective Date	End Effective Date	Delegated Role	My Current Role
Sally Supervisor Employees - Manny Jobs	Salaried, Sam	05/01/2014	06/30/2014	MANAGER_GROUP	MANAGER_GROUP

Revoke Is Effective As Of: Revoke Immediate

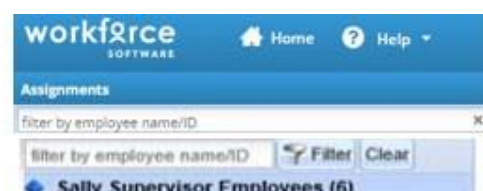
Managing Groups in Workforce

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”

Sally Supervisor Employees

Group Name

Group Display ID

Group Type

Display terminated assignments in assignment trees (soft terminated only)

Available for End of Period Processing

Evaluate Membership As Of

Assignments | **Filters** | **Advanced**

Select All

Assignment	Start Date	End Date
<input type="checkbox"/> Hourly, Helen (TC9997 General Assistant 0101B - 00 (TC999700-899111111))	01/01/1900 12:00 am	N/A
<input checked="" type="checkbox"/> Jobs, Manny (TC9997 General Assistant 0101B - 00 (TC999700-876543211))	01/01/1900 12:00 am	N/A
<input checked="" type="checkbox"/> Jobs, Manny (TC9997 General Assistant 0101B - 01 (TC999701-876543211))	01/01/1900 12:00 am	N/A
<input checked="" type="checkbox"/> Jobs, Manny (TC9997 General Assistant 0101B - 02 (TC999702-876543211))	01/01/1900 12:00 am	N/A
<input type="checkbox"/> Regulator, Roger (RE9978 KPBS Dev Asst I 5597C - 00 (RE997800-854797979))	01/01/1900 12:00 am	N/A
<input type="checkbox"/> Salaried, Sam (RE9954 Prog Coordinator II 0212A - 00 (RE995400-819191919))	01/01/1900 12:00 am	N/A

Select the Employees for a new group

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

Assignment Group Management

Copy of Sally Supervisor Employees

Group Name

Group Type

Display terminated assignments in assignment trees (soft terminated only)

Available for End of Period Processing

Evaluate Membership As Of

Assignments | **Filters** | **Advanced**

Selected Assignments

Jobs, Manny (TC9997 General Assistant 0101B - 00 (TC999700-876543211))

Jobs, Manny (TC9997 General Assistant 0101B - 01 (TC999701-876543211))

Jobs, Manny (TC9997 General Assistant 0101B - 02 (TC999702-876543211))