

Manager Guide

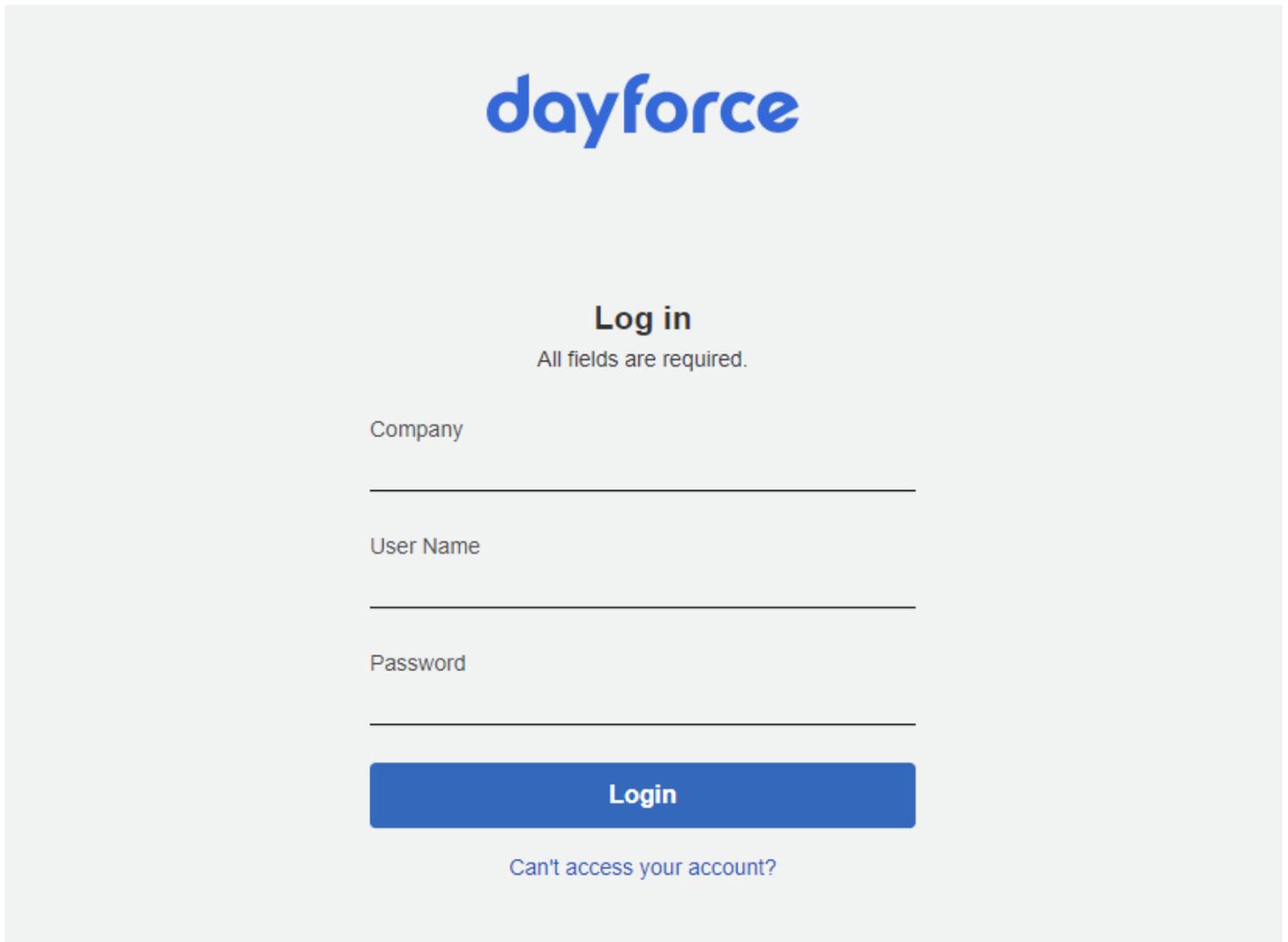
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How to Login

To log into the Dayforce application use the link below:

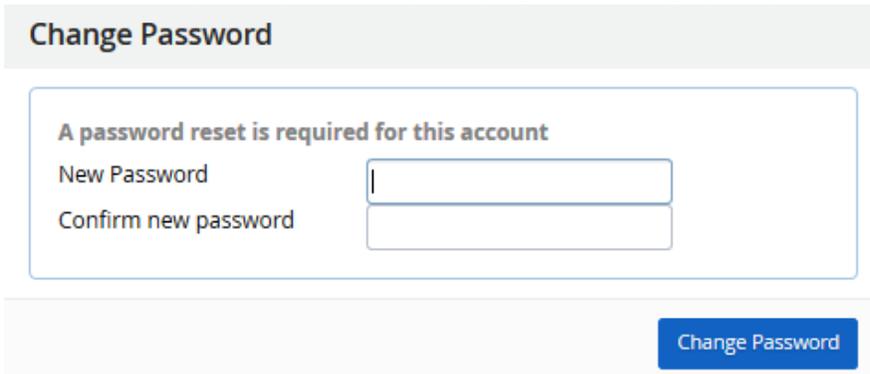
<https://www.dayforcehcm.com/mydayforce/login.aspx>



The image shows the Dayforce login page. At the top center is the Dayforce logo in blue. Below the logo is the heading "Log in" in bold black text, followed by the instruction "All fields are required." in a smaller font. There are three input fields: "Company", "User Name", and "Password", each with a horizontal line below it. Below these fields is a blue button with the text "Login" in white. At the bottom of the form area is a link that says "Can't access your account?" in blue text.

Enter your login credentials provided by your employer:

If you are logging in for the first time, the system will prompt you to change your password:

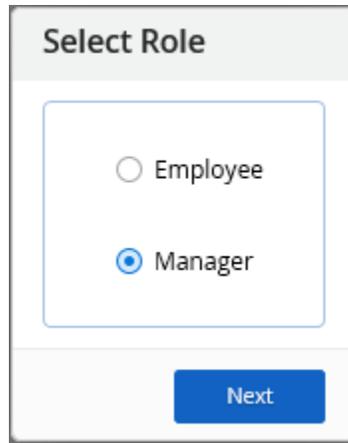


The image shows a "Change Password" form. At the top is a grey header with the text "Change Password" in bold. Below the header is a white box with a blue border containing the message "A password reset is required for this account" in bold. Underneath are two input fields: "New Password" and "Confirm new password". To the right of the "Confirm new password" field is a blue button with the text "Change Password" in white.

Enter your new password twice and click on **Change Password**.

Logging in as Manager

The system will then prompt you to select the role you would like to log in with, select manager and hit Next:

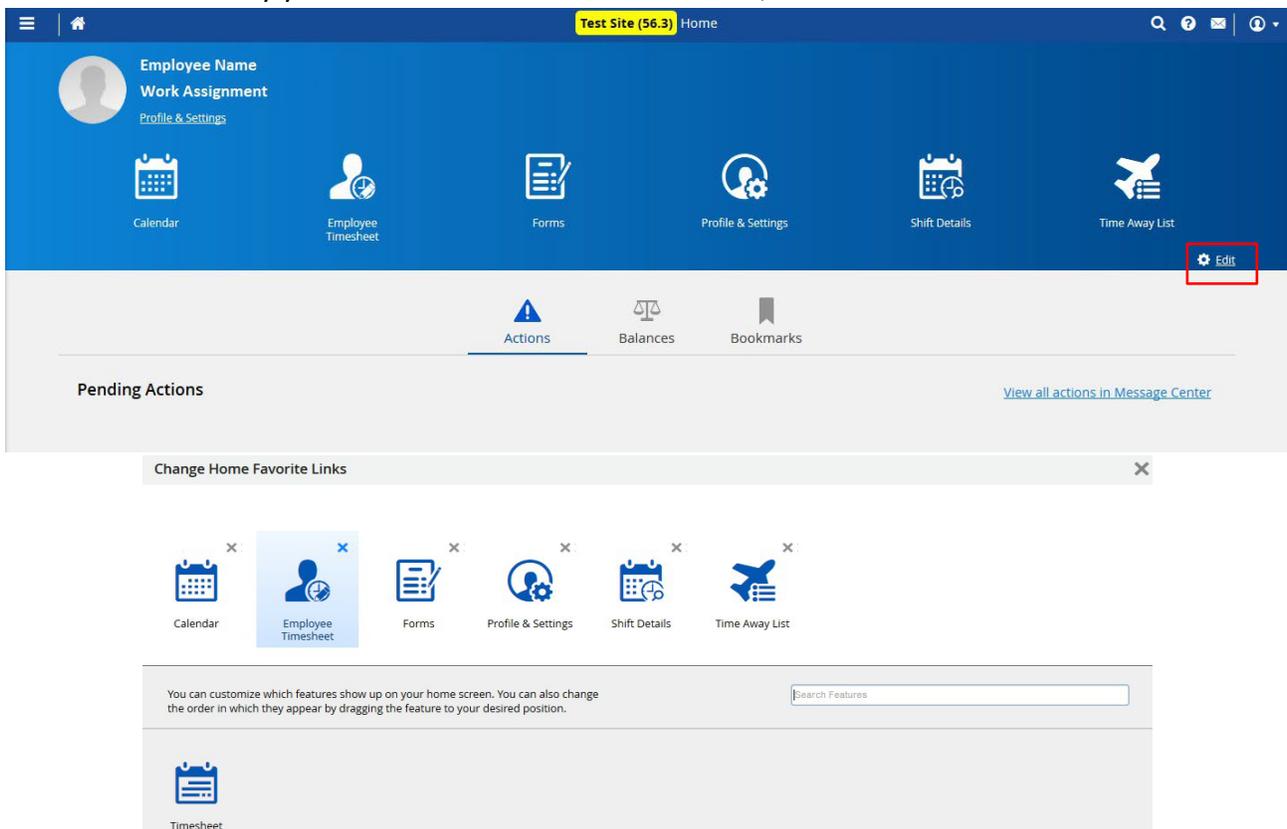


A dialog box titled "Select Role" with a light gray background. It contains two radio button options: "Employee" (unselected) and "Manager" (selected). Below the options is a blue button labeled "Next".

Home Screen

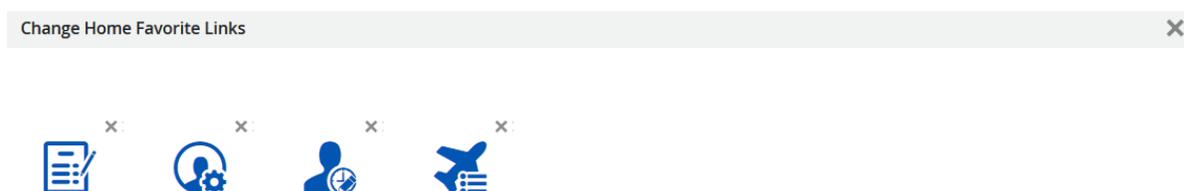
From the Home Screen you can quickly navigate to frequently used screens, review balances, upcoming schedules etc.

If you would like to modify your favorites from the Home Screen, click on the Edit Icon:



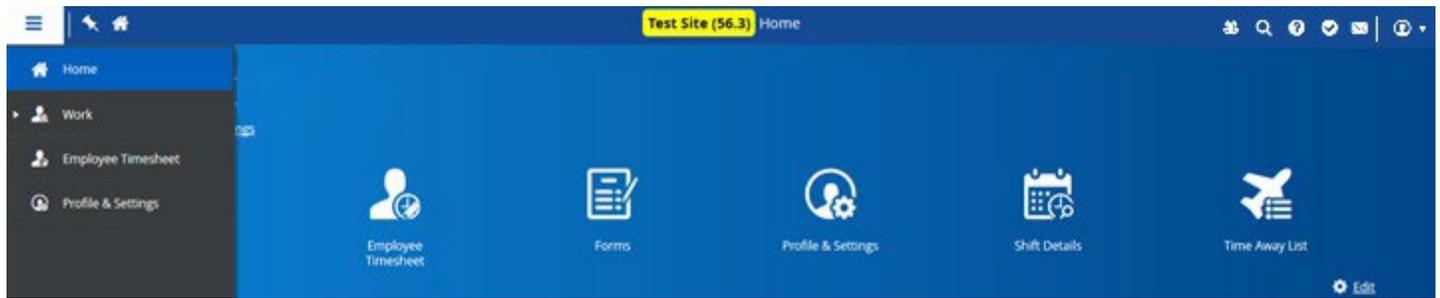
The screenshot shows the Home Screen interface. At the top, there's a navigation bar with a home icon, a search icon, and a user profile icon. Below the navigation bar, there's a section for "Employee Name" and "Work Assignment". The main area contains several icons for "Calendar", "Employee Timesheet", "Forms", "Profile & Settings", "Shift Details", and "Time Away List". An "Edit" icon (a gear) is highlighted with a red box in the bottom right corner of this section. Below the main area, there's a section for "Pending Actions" with a link to "View all actions in Message Center". At the bottom, there's a "Change Home Favorite Links" dialog box. This dialog box shows a list of icons for "Calendar", "Employee Timesheet", "Forms", "Profile & Settings", "Shift Details", and "Time Away List". The "Employee Timesheet" icon is currently selected. Below the list, there's a search bar labeled "Search Features" and a "Timesheet" icon at the bottom.

In this window, you can move Icons around and remove anything you don't want. Once you are done with your changes you can Save your changes, or Restore the Default Settings from the bottom right corner of the window:



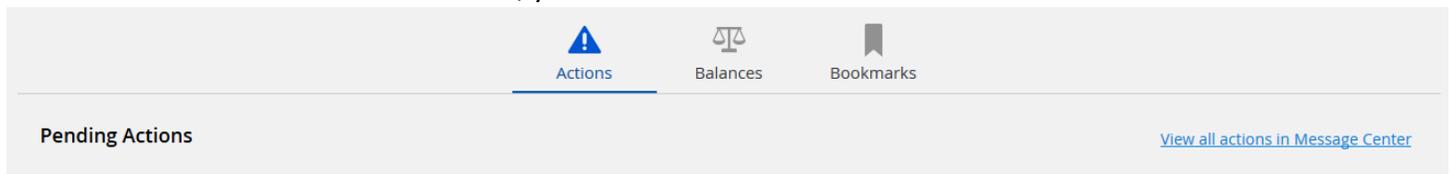
A dialog box titled "Change Home Favorite Links" with a light gray background. It contains a list of icons for "Forms", "Profile & Settings", "Employee Timesheet", and "Time Away List". Each icon has a small 'x' in the top right corner, indicating it can be removed. The "Employee Timesheet" icon is currently selected.

Home Screen Legend

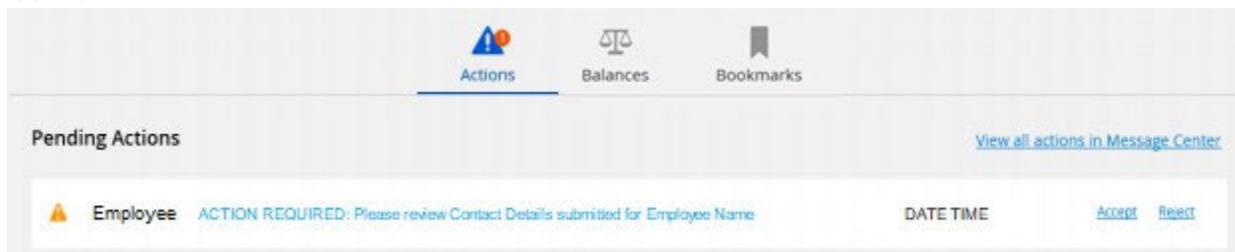


-  Menu/Navigation Panel
-  Home – this icon will appear on all screens as a quick link to take you back to the Home Screen
-  People
-  Search
-  Help
-  Approvals
-  Message Centre
-  Profile/Settings & Logout

On the bottom half of the Home Screen, you will see:



 **Actions** : Displays any pending actions you have in your inbox. You can **Accept** or **Reject** the action by clicking on the appropriate link. To view the workflow form associated with the action, click the link in the tab:

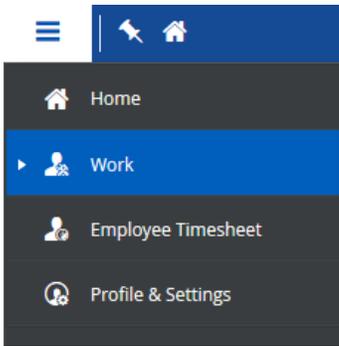


 **Balances**: Show balance details including amounts that employees have accrued, pending, remaining etc.

 **Bookmarks** : Show links to your frequently access websites

Navigation Panel

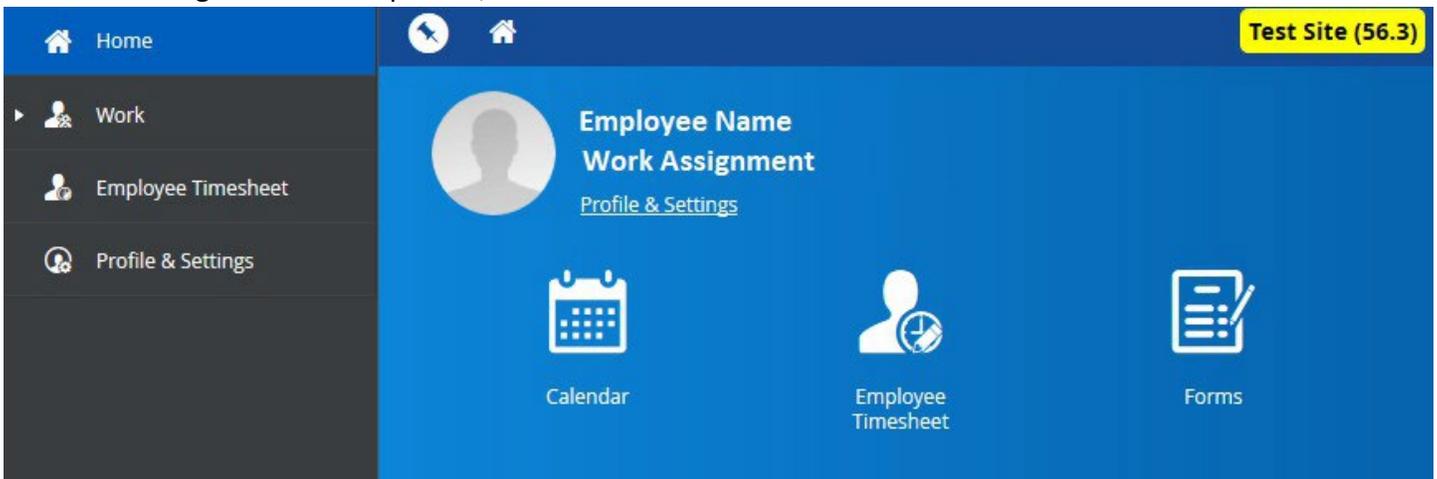
The navigation panel displays all the features that you can access. It is displayed to the far left of the screen, and is always available (even it is hidden, or “unpinned”).



The application highlights the feature you’re currently using in blue. You can navigate to another feature by selecting it from the panel.

By default, the navigation panel is hidden (“unpinned”) when you first log into the application. You can pin the panel so that it will always appear on the left by clicking the Pin Icon  once the Navigation panel is opened.

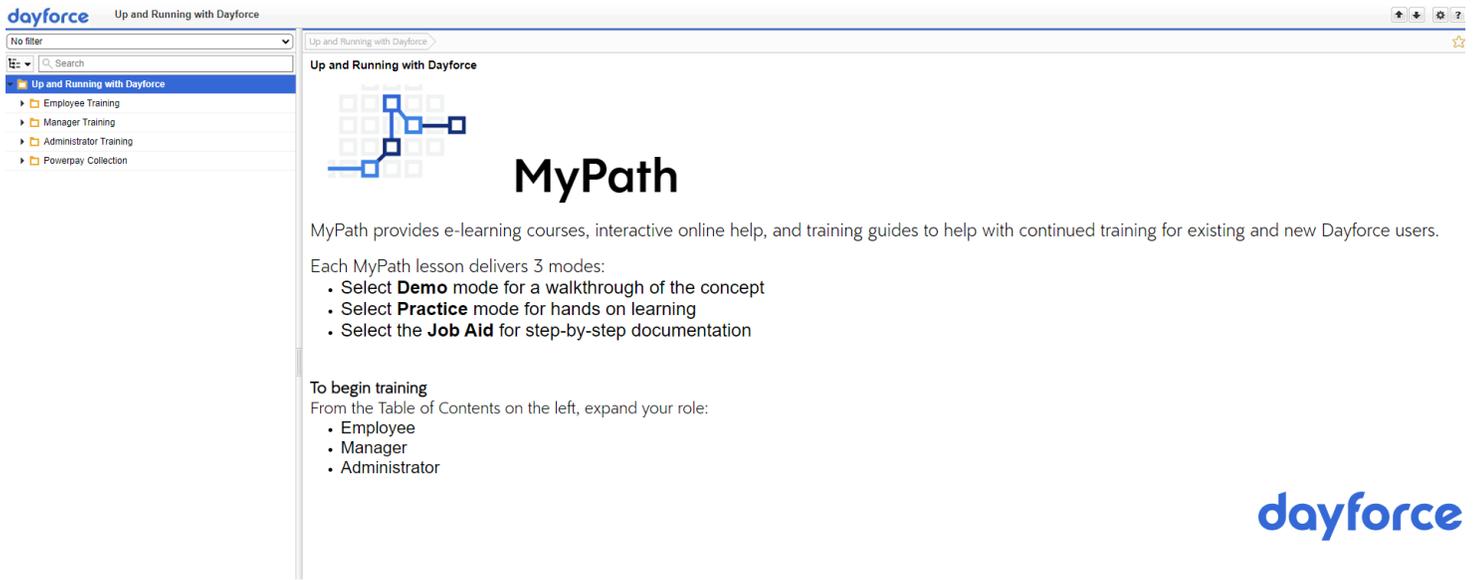
When the Navigation Panel is pinned, the screen will look like this:



The application will continue to display the navigation panel until you unpin it.

Help

The Help Icon will open another window or tab to the Ceridian Dayforce Online Help with instructions to help you navigate through the application.



The screenshot shows the Dayforce MyPath training interface. On the left is a navigation menu with categories like Employee Training, Manager Training, Administrator Training, and Powerpay Collection. The main content area features the 'MyPath' logo and text explaining that it provides e-learning courses, interactive online help, and training guides. It lists three modes: Demo, Practice, and Job Aid. Below this, it provides instructions on how to begin training by expanding roles like Employee, Manager, or Administrator. The Dayforce logo is visible in the bottom right corner.

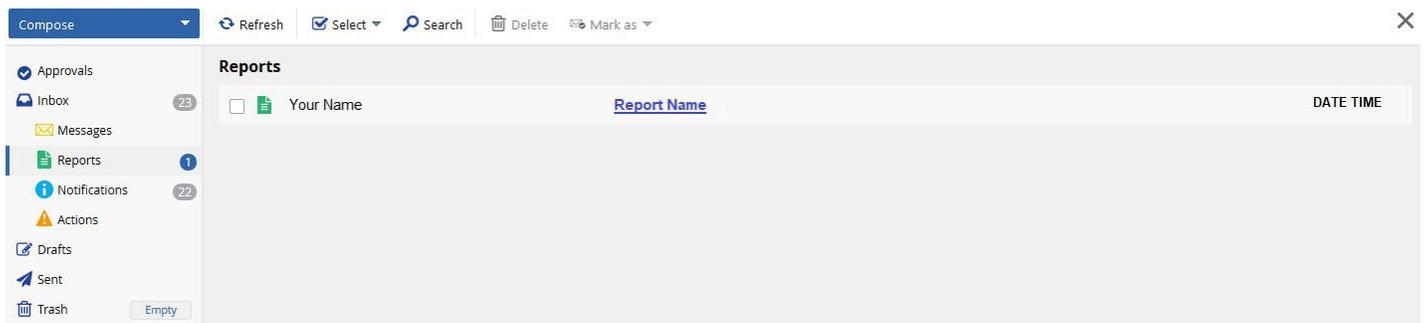
Message Centre

In the Message Centre you can create and view messages regarding your DFTA account.

View Messages

By Default, the application displays all messages (including notes, broadcasts, reports, and actions) when you open **Message Centre**. If necessary, you can click one of the filter buttons beneath the **Inbox** tab to view a specific type of message.

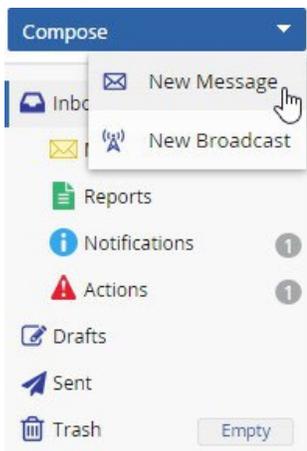
For example, to view only reports, click the **Reports** button. The application hides all other items in your inbox and displays only reports:



The screenshot shows the Dayforce Message Centre interface. The 'Reports' filter is selected in the left-hand navigation pane. The main content area displays a table of reports with columns for 'Report Name' and 'DATE TIME'. A single report entry is visible with the name 'Your Name' and a link to view the report. The interface includes standard email management tools like 'Compose', 'Refresh', 'Select', 'Search', 'Delete', and 'Mark as' at the top.

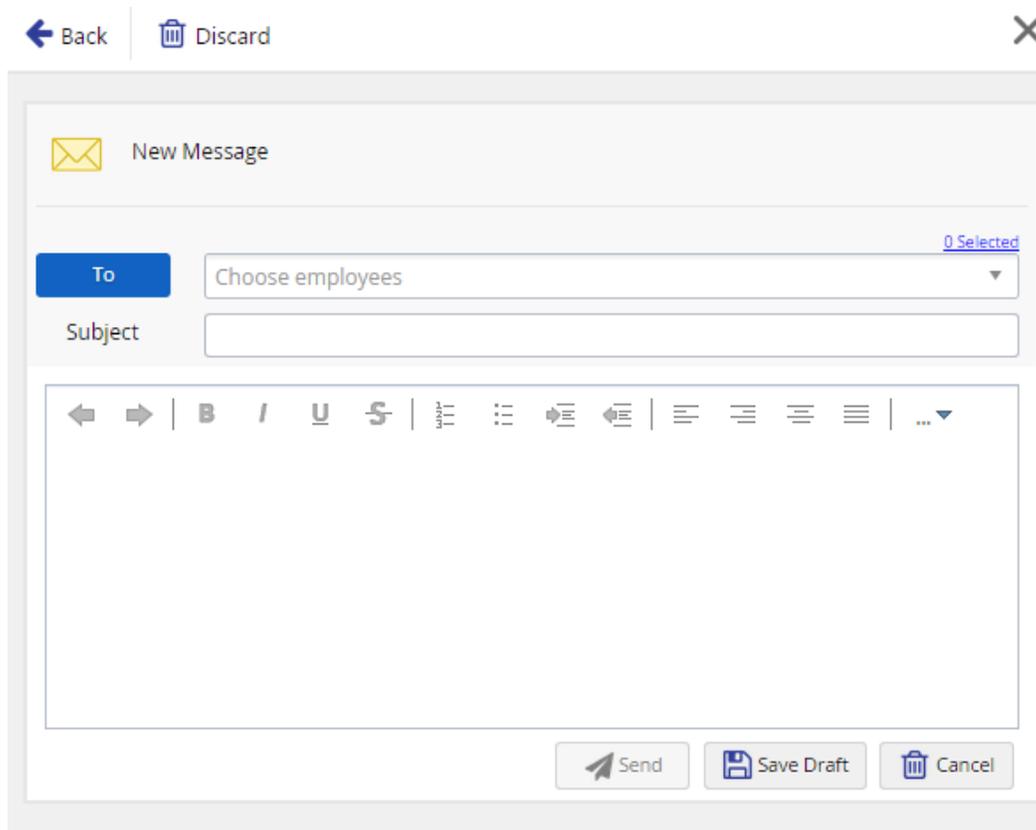
Send Messages

Depending on your company's configuration, you might be able to send messages and/or broadcasts to your colleagues. The application displays any message types that you can send in the **Compose** drop-down list:



In the example above, the user has access to send both messages and broadcasts. If they only had access to send messages, the application would only display the **New Message** option in the list.

Once you have selected the type of message to compose, the application displays a blank message or broadcast:



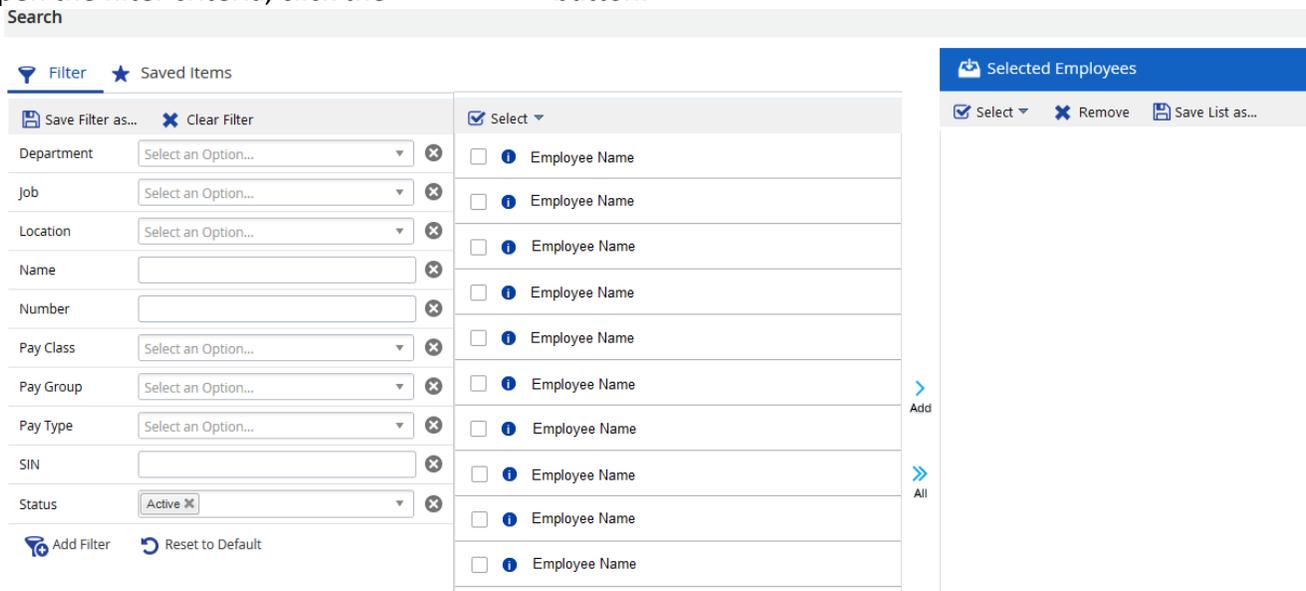
You can select your recipients in two ways:

1) Start typing the recipient's name into the **To** field. The application displays the appropriate users:

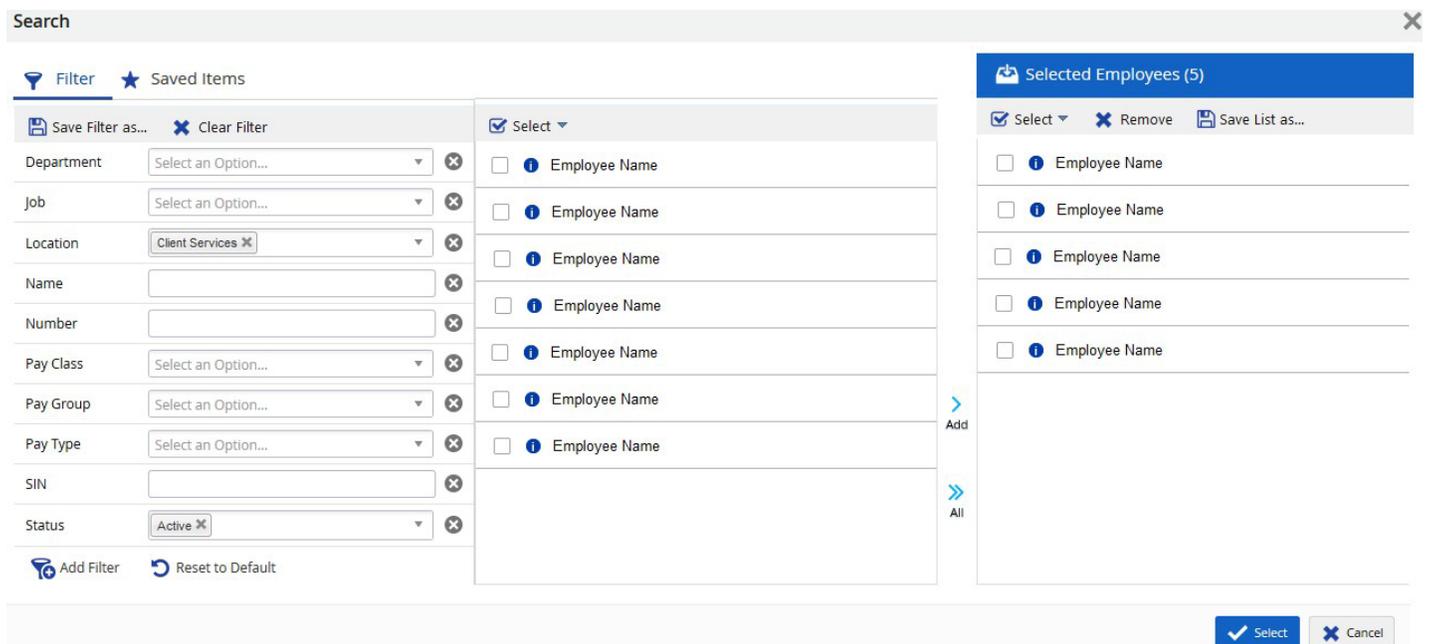


2) If you must send a communication to a large audience, you can use filters to find the necessary recipients.

To open the filter criteria, click the **To** button:



Specify your filter criteria using the controls provided, then select the checkbox beside the recipients' names and click the **Add** button. The application displays the users you have selected in the **Selected Employees** column:



Once you have selected all the necessary users, you can compose your message. The application provides text formatting controls for messages and broadcasts, so that you can format your message as necessary:

New Message

To: Employee Name x Employee Name x Employee Name x ... 50 Selected

Subject: Reminder: Team Potluck Tomorrow!

Team,
Don't forget about tomorrow's team potluck! If you haven't signed up already, but still want to participate, please make sure that you contact me **ASAP** to let me know what you're bringing.
Thanks!

Send Save Draft Cancel

Your Team

If you manage other employees, they are displayed on the **My Team** section. Click on a team member to open their Employee Card.

Employee Name # Manager: Your Name

Position Name
Location

View Profile View Hierarchy

Profile

Personal Contact

Primary Residence Address 123 Test Lane Toronto ON L1L 1L1 Canada	Mobile No Mobile Phone Number Available Home No Home Phone Number Available
--	--

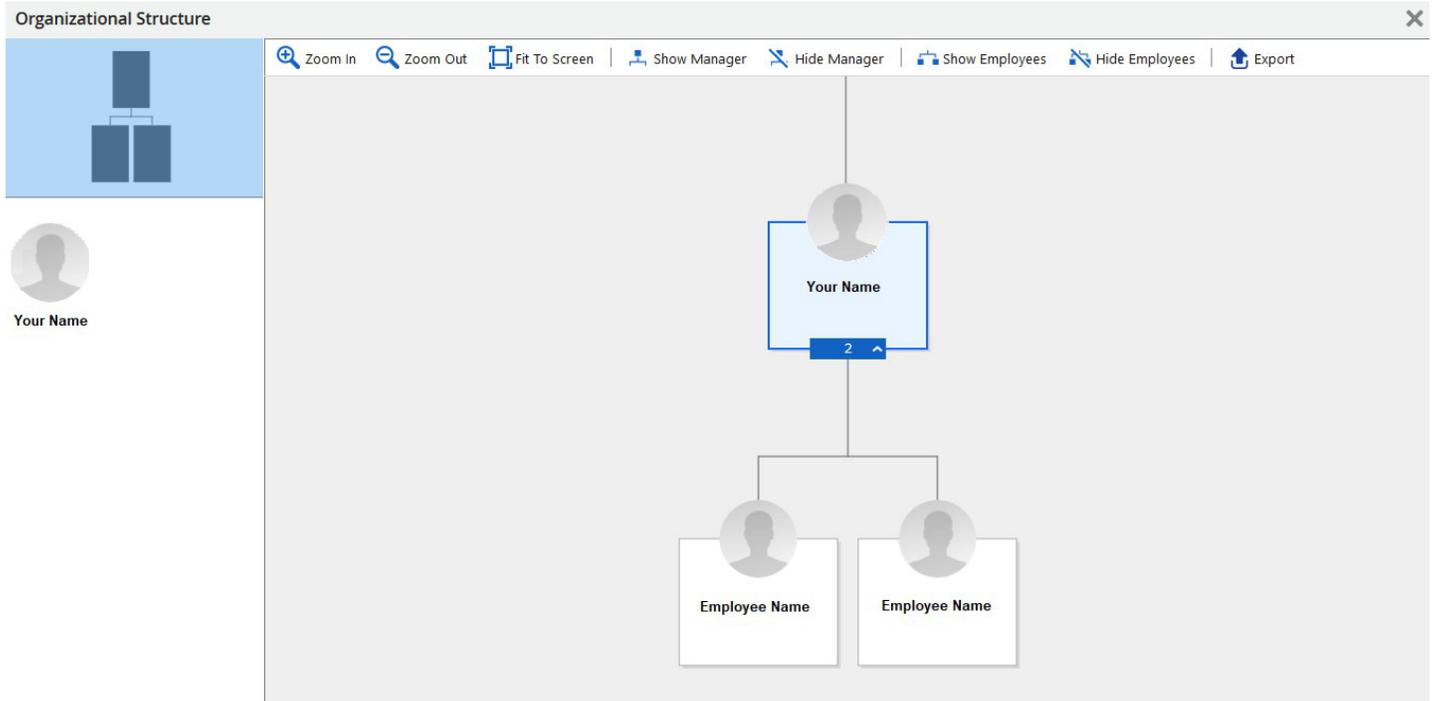
Business Contact

Employee Details

Emergency Contacts

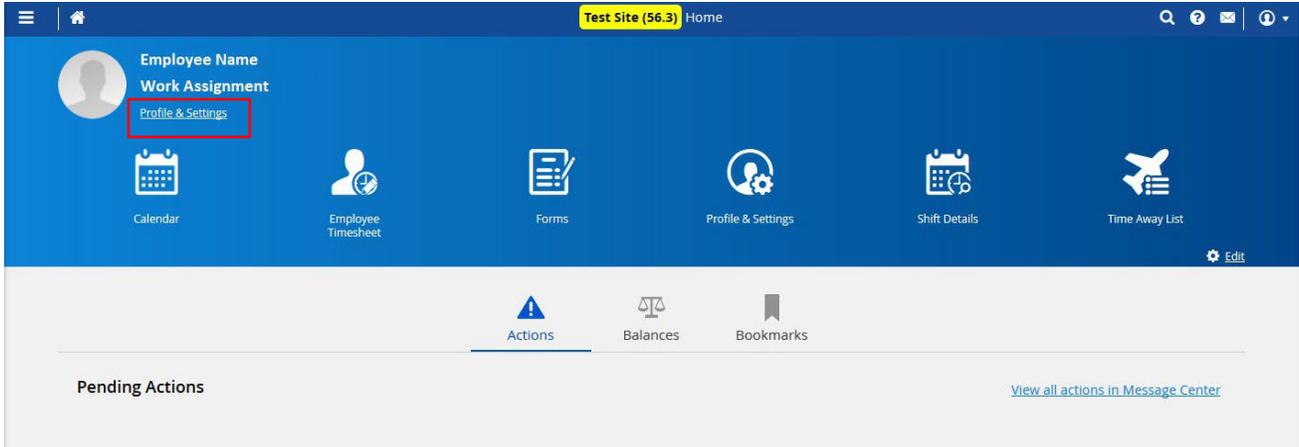
Click on **View Profile** from the Employee Card to take you to the employee's profile in People.

Click on **View Hierarchy** to view the organization hierarchy.

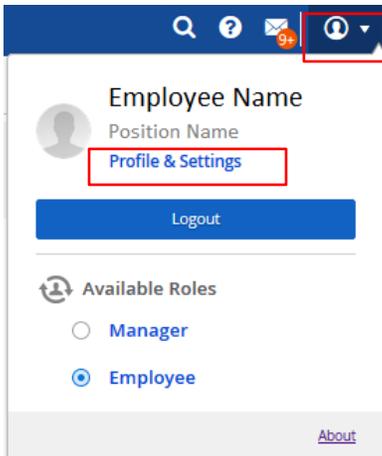


Profile and Settings

To navigate to the Profile and Settings you can do it directly from the Home Screen:

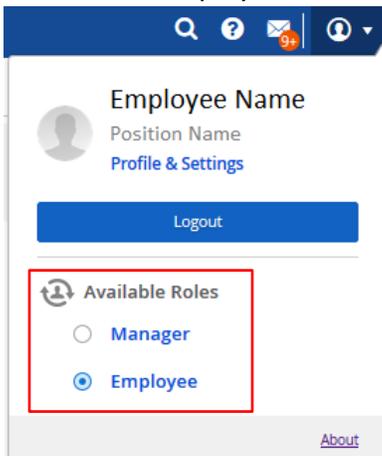


Or by clicking on the Profile and Settings through the Top Right Icon:



Switching Roles

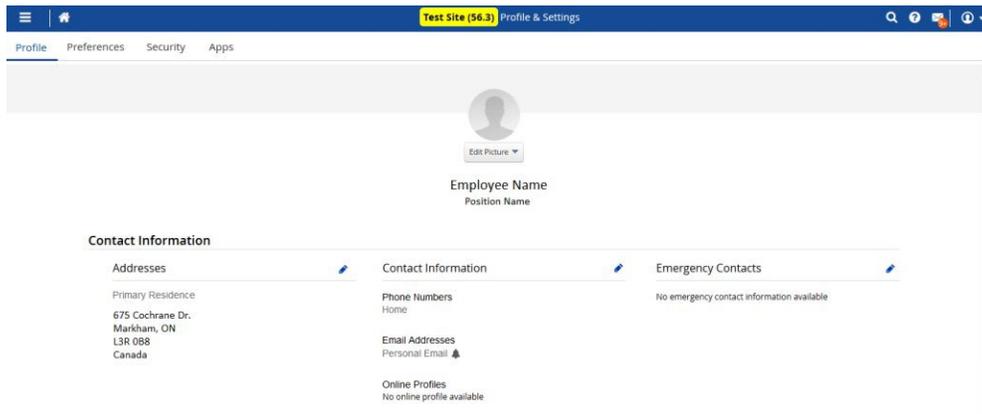
The application displays any other roles you've been assigned. When you select one of them, the application reloads and displays the features you're assigned access for that role.



Profile

On the Profile Tab, you can do things such as:

- Add/Edit Display Picture
- Update Contact Information



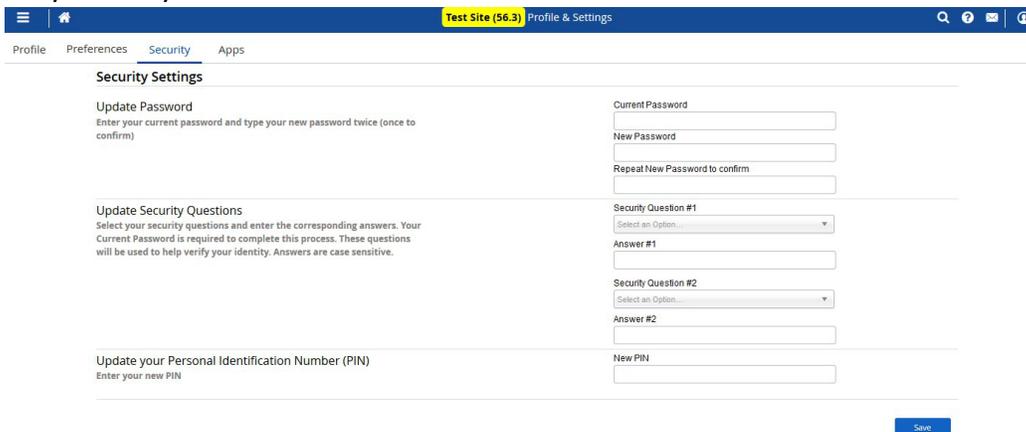
Preferences

You can change your culture and language settings from the Preferences tab of the Profile & Settings

Security

You can update your security settings

- Change your Password
- Add/Modify Security Questions



App

The application displays information on the Dayforce Mobile App, including links to download the app on the App Store or Google Play, your Company ID and User Name, and a link to the Dayforce Mobile FAQ.



Viewing Your Employee Records in People

Once you have setup your employees in the application, you need to maintain their records to ensure they are accurate and up-to-date.

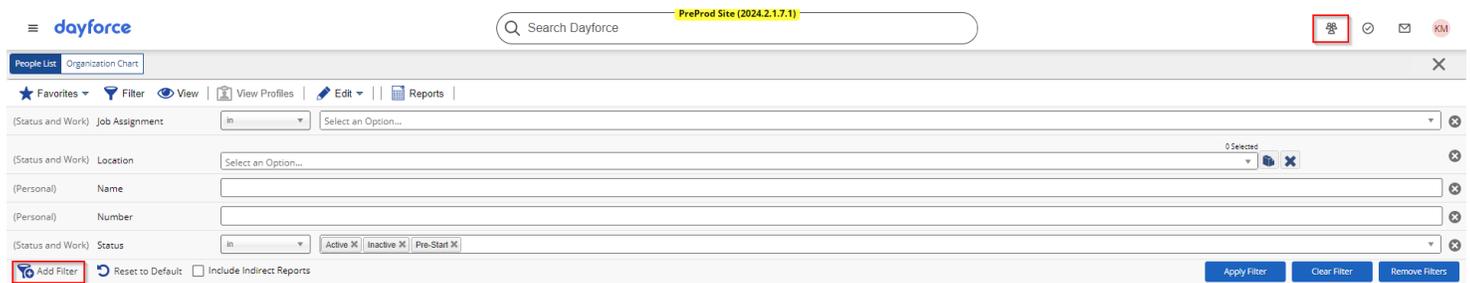
The **People** feature provides a centralized access point for data about your employees, such as their status, contact information, work assignments etc.

It is in the top right-hand corner of the application:

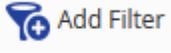
Filter Employee Records

Before you Begin: The filters you have access to depend on the access authorizations assigned to your role. For example, if you do not have permissions to view employee pay information, the application does not display affected pay filters.

Filtering employee records allows you to narrow the list, so that you're only seeing employees who meet the specified filter criteria. For example, you could use this functionality to find all employees who work at a specific location.



By Default, the application displays some filter options when you open the **People** screen:

If you would like to modify your filter options, click on the  Add Filter icon and check off any options you would like to use.

View Employee Records

You can either view individual employee records or load a number of records that you can navigate between.

To view a single employee record, simply click the employee's name in the list:

<input type="checkbox"/>	Name	Employee Number	Status	Primary Job Assignment
<input type="checkbox"/>	(Amanda Tamane)	0018	Active	325-QC Inspector
<input type="checkbox"/>	(Erin Walsh)	0035	Active	175-Senior Designer
<input type="checkbox"/>	(Julie Palmer)	0057	Active	175-Drafter

To load multiple employee records, complete the following steps:

<input type="checkbox"/>	Name	Employee Number	Status	Primary Job Assignment
<input checked="" type="checkbox"/>	(Amanda Tamane)	0018	Active	325-QC Inspector
<input checked="" type="checkbox"/>	(Erin Walsh)	0035	Active	175-Senior Designer
<input type="checkbox"/>	(Julie Palmer)	0057	Active	175-Drafter

1. Select the checkboxes next to the records you want to open:

2. Click the **View Profiles** button above the filter options:

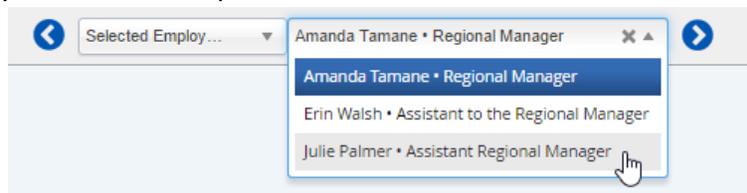
The screenshot shows the 'People' screen interface. At the top, there's a header with 'Test Site (56.3) People' and various icons. Below the header, there's a 'People List' tab. A 'View Profiles' button is highlighted with a red box. Below the button, there are filter options for Location, Name, Number, Position, and Status. At the bottom, there are buttons for 'Apply Filter', 'Clear Filter', and 'Remove Filters'.

1. Navigate between the profiles you've selected by doing one of the following actions:

- Click the left and right arrows:



- Select the employee from the drop-down list:



For more details on the **People** Screen, see HTML People Document.

Scheduling Your Staff

Dayforce provides you with a graphical tool to schedule your employees. You can perform a variety of scheduling tasks, such as adding shifts and changing their start and/or end times or their duration.

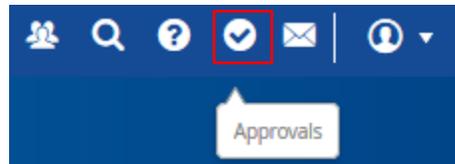
The application also checks your schedule for problems, such as scheduling overlapping shifts or scheduling employees when they are unavailable and alerts you while you are working on the schedule if it contains any of these issues.

If your company uses Scheduling, please see the Introducing Schedules Document.

Approvals

This is where you approve/deny Time Away From Work Requests entered by your employees.

To navigate to the **Approvals** screen, you can click on the  icon from the top right hand corner of the application.



By default, the application will show any Pending, Cancellation Pending Requests that need to be actioned.

Employee Name	Approval Type	Status	Date Range	Location	Manager	Action
Milliken, Walter 6035	Availability	Pending	Starting from 4/30/2017			Approve Deny
Christensen, Winston 6030	Time Away From Work	Pending	VAC 4/27/2017	New York Customer Service		Approve Deny
Conner, Sheila 6028	Time Away From Work	Pending	VAC 4/21/2017	New York Customer Service		Approve Deny
Conner, Sheila 6028	Time Away From Work	Pending	VAC 3/27/2017 - 4/7/2017	New York Customer Service		Approve Deny
Powell, Christopher 6037	Time Away From Work	Pending	VAC 3/28/2017	New York Computers		Approve Deny

You can simply Approve or Deny the request or you can click on the request to view the details. The details of the request depend on the type of request.

Enter Time Off Request

To create a new Time Away From Work Request in the **Approvals** screen, complete the following steps:

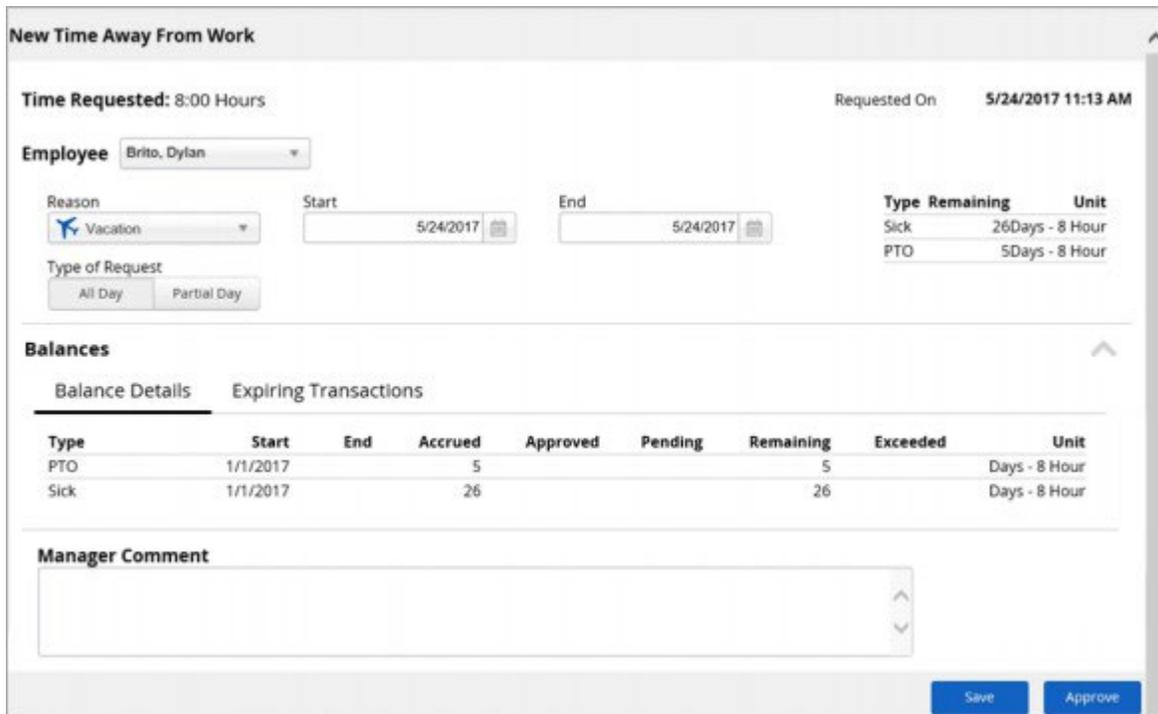
1. In the Approvals toolstrip, click **Request New Time Off**:



The new time away from work request opens in an overlapping window.

2. In the Employee drop-down list, select the appropriate employee.

3. In the reason drop-down list select the reason for the time off. This list is filtered based on the selected employee. When you select a reason, the application displays the balance type, remaining, and unit days for the employee:



New Time Away From Work

Time Requested: 8:00 Hours Requested On: 5/24/2017 11:13 AM

Employee: Brito, Dylan

Reason: Vacation

Start: 5/24/2017 End: 5/24/2017

Type of Request: All Day Partial Day

Type	Remaining	Unit
Sick	26Days - 8 Hour	
PTO	5Days - 8 Hour	

Balances

Balance Details Expiring Transactions

Type	Start	End	Accrued	Approved	Pending	Remaining	Exceeded	Unit
PTO	1/1/2017		5			5		Days - 8 Hour
Sick	1/1/2017		26			26		Days - 8 Hour

Manager Comment

Save Approve

4. Enter the start and end date of the request or click the calendar icons to select the dates.

5. Click **All Day** or **Partial Day** to indicate the type of request.

6. Optionally, enter your comments in the **Manager Comment** field.

7. Do one of the following actions:

- Click **Save** to save the request and approve it later
- Click **Approve** to save and approve the request at once.

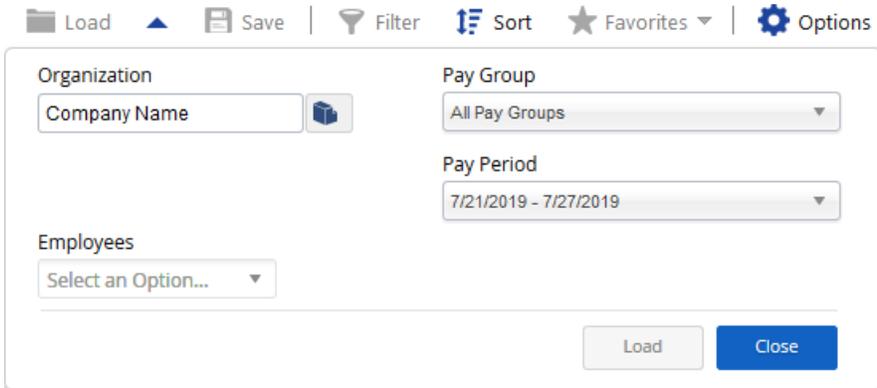
Timesheets

You can load your employees' time and attendance records in **Timesheets**. The application displays the Locations that you have access to, if you manage multiple locations, make sure you pick one location in your organization before you load any timesheets.

Load Timesheets

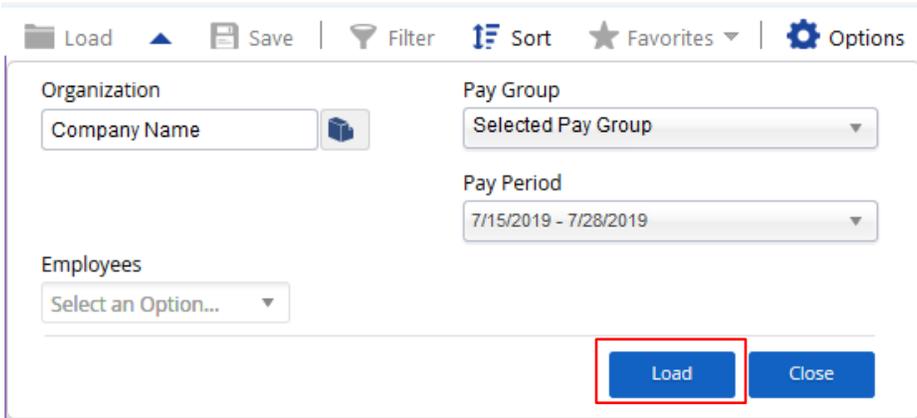
1. Click on the arrow next to the **Load** button: 

A dialog opens displaying additional loading options:



2. Select a Pay Group and a Pay Period from the corresponding drop-down lists.

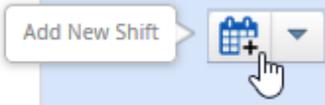
3. Click the **Load** button display appropriate information:



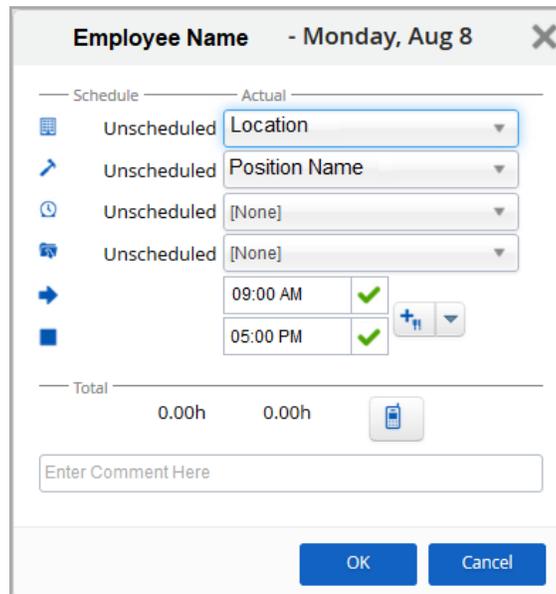
Add Shifts

After loading your timesheets, you can add shifts for specific employee.

1. In **Timesheets**, select the appropriate cell and click the add icon ():

Employees	Sunday, Aug 7	Monday, Aug 8
Employee Name		

The application displays a dialog in which you can add the shift details:



The dialog box is titled "Employee Name - Monday, Aug 8" and has a close button (X) in the top right corner. It is divided into two sections: "Schedule" and "Actual". Under "Schedule", there are four rows, each with an icon and the text "Unscheduled". The first row has a calendar icon and a dropdown menu for "Location". The second row has a location pin icon and a dropdown menu for "Position Name". The third row has a clock icon and a dropdown menu for "[None]". The fourth row has a person icon and a dropdown menu for "[None]". Below these are two rows for start and end times: "09:00 AM" with a green checkmark and a plus icon, and "05:00 PM" with a green checkmark and a plus icon. Under "Actual", there are two rows for "0.00h" and "0.00h", each with a plus icon. At the bottom, there is a text input field labeled "Enter Comment Here" and two buttons: "OK" and "Cancel".

Depending on how your application is configured, you may see the employee's primary job, the default meals or breaks, and the shift default start and end time.

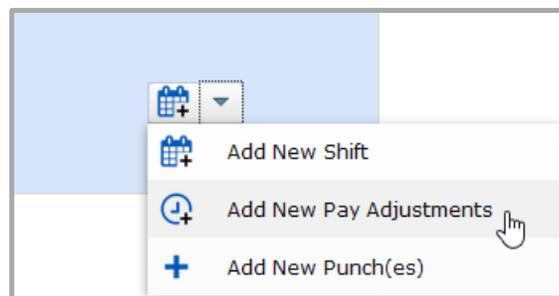
2. If needed adjust the shift details using the associated drop-down lists in the dialog.
3. Click the arrow next to the start and end times, and then adjust the times as needed using the up and down arrows. You can also enter the time directly into the corresponding field.
4. If you want to add a meal, click the add meal icon (). If you want to add a break, click the arrow next to the add meal icon, and then select **Add Break** in the drop-down list. Once added, you can modify the start and end time for the meal or break.
5. When you are finished creating the new shift, click the **OK** button. The application closes the dialog box and adds the shift to the timesheet.

NOTE: You must Save the modifications to the timesheets using the Save Icon in the left corner of the Timesheets Screen.

Add Pay Adjustments

You can add amounts or hour-based pay adjustments for employees on the timesheets.

1. In the timesheets, select the appropriate cell, and then click the arrow next to the add icon () to expand the add drop-down list:



2. Select **Add New Pay Adjustments**.

The dialog Add New Pay Adjustments dialog box opens:

Add New Pay Adjustments ✕

Pay Adjustment Type Bonus

Position Employee's Position Name

Amount 0.00 Amount

Comment

Reference Date

OK
Cancel

3. Specify the details of the pay adjustment, including the pay adjustment type and amount/hours.
4. When you are finished creating the pay adjustment, click **OK**. The application closes the dialog box and adds the adjustment to the timesheets.

Authorize Timesheet Records

You will need to authorize an employee's shift for those hours to be sent over to Powerpay.

To authorize a single employee's complete week, click on the employee's name to highlight the entire week and then click the Authorize Icon **Authorize**.

You will see a shift has been authorized when you see this icon in the top right-hand corner of the record:

To authorize, all your employees, click on the Employees to highlight your entire Timesheet:

Employees	Monday, Jul 15	Tuesday, Jul 16	Wednesday, Jul 17
Employee Name	Position Name 9:00 AM - 5:00 PM 0.00 8.00	Position Name 9:00 AM - 5:00 PM 0.00 8.00	Position Name 9:00 AM - 5:00 PM 0.00 8.00
Employee Name	Position Name 9:00 AM - 5:00 PM 0.00 8.00	Position Name 9:00 AM - 5:00 PM 0.00 8.00	Position Name 9:00 AM - 5:00 PM 0.00 8.00
Employee Name	Position Name 9:00 AM - 5:00 PM 0.00 8.00	Position Name 9:00 AM - 5:00 PM 0.00 8.00	Position Name 9:00 AM - 5:00 PM 0.00 8.00

Click on the Authorize Icon **Authorize**

Employees	Monday, Jul 15	Tuesday, Jul 16	Wednesday, Jul 17
Employee Name	Position Name 9:00 AM - 5:00 PM 0.00 8.00	Position Name 9:00 AM - 5:00 PM 0.00 8.00	Position Name 9:00 AM - 5:00 PM 0.00 8.00
Employee Name	Position Name 9:00 AM - 5:00 PM 0.00 8.00	Position Name 9:00 AM - 5:00 PM 0.00 8.00	Position Name 9:00 AM - 5:00 PM 0.00 8.00
Employee Name	Position Name 9:00 AM - 5:00 PM 0.00 8.00	Position Name 9:00 AM - 5:00 PM 0.00 8.00	Position Name 9:00 AM - 5:00 PM 0.00 8.00