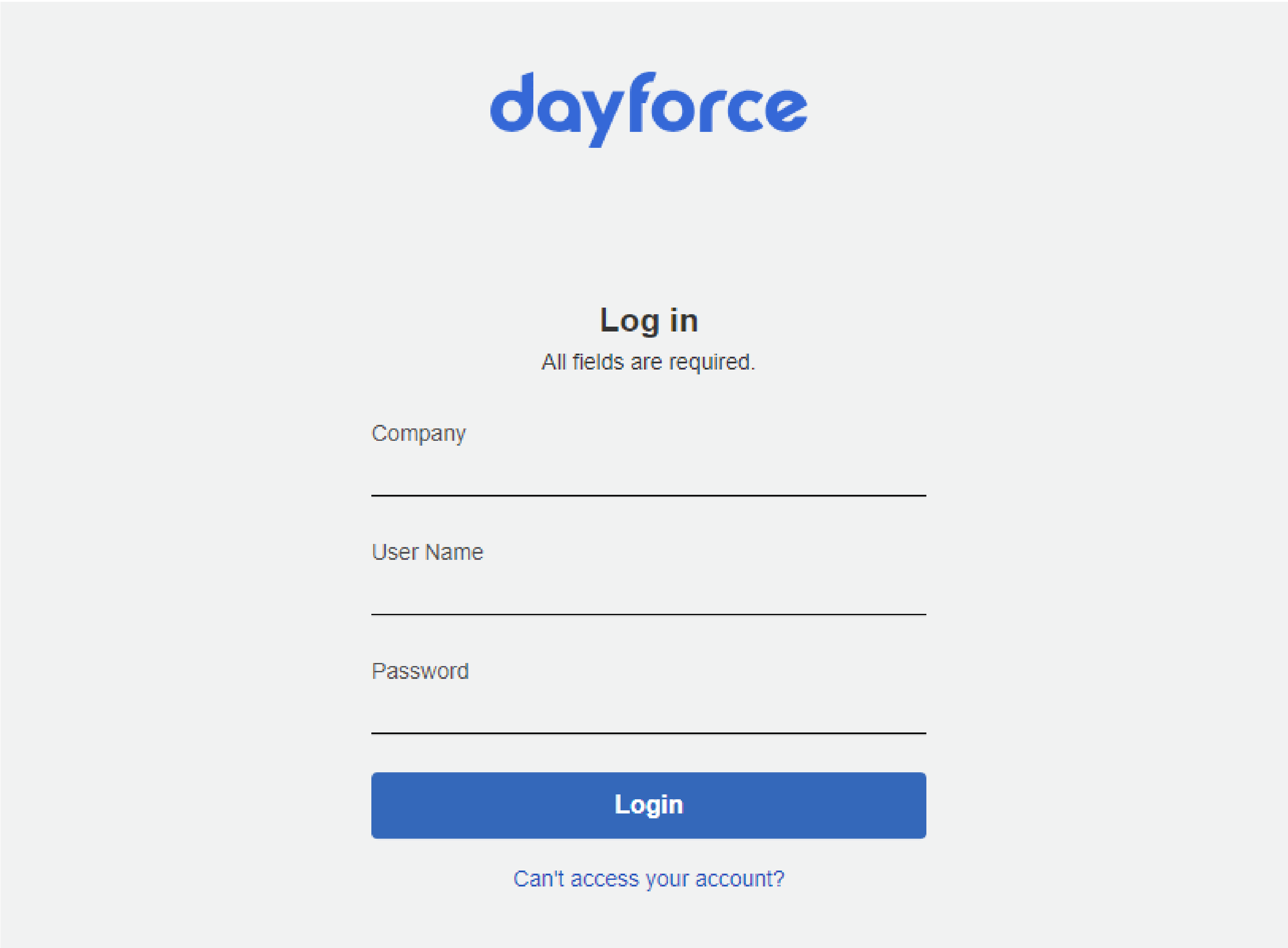
Manager Guide

Contents

How to Login 3
  Logging in as Manager 4
Home Screen 5
  Home Screen Legend 6
    Navigation Panel 7
    Help 8
    Message Centre 8
    Your Team 11
Profile and Settings 13
  Switching Roles 13
  Profile 14
  Preferences 14
  Security 14
  App 14
Viewing Your Employee Records in People 15
  Filter Employee Records 15
  View Employee Records 16
Scheduling Your Staff 17
Approvals 17
  Enter Time Off Request 18
Timesheets 19
  Load Timesheets 19
  Add Shifts 19
  Add Pay Adjustments 20
  Authorize Timesheet Records 21

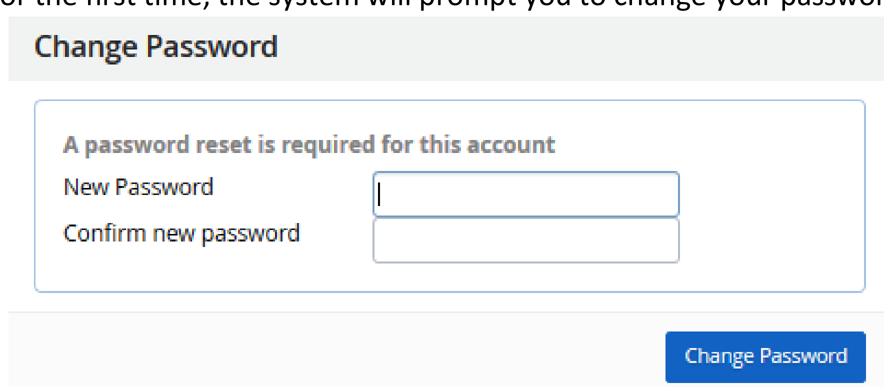
How to Login

To log into the Dayforce application use the link below:
https://www.dayforcehcm.com/mydayforce/login.aspx



Enter your login credentials provided by your employer:

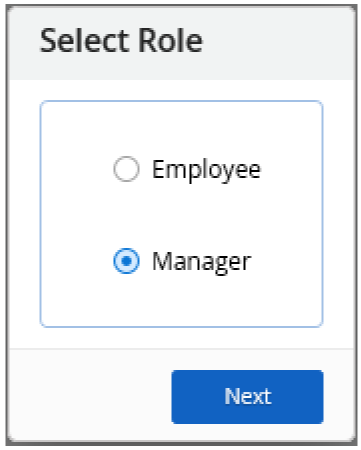
If you are logging in for the first time, the system will prompt you to change your password:



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

Logging in as Manager

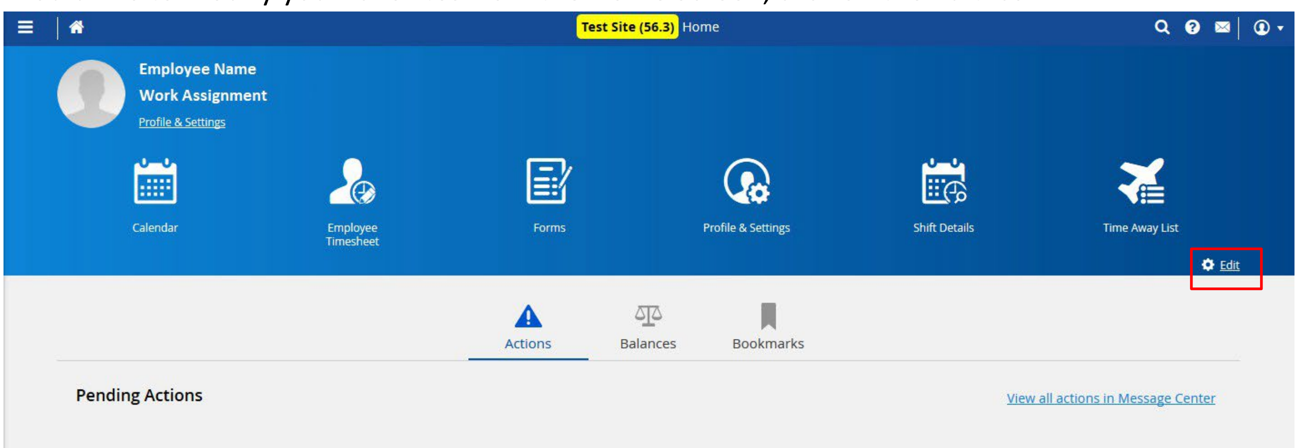
The system will then prompt you to select the role you would like to log in with, select manager and hit Next:

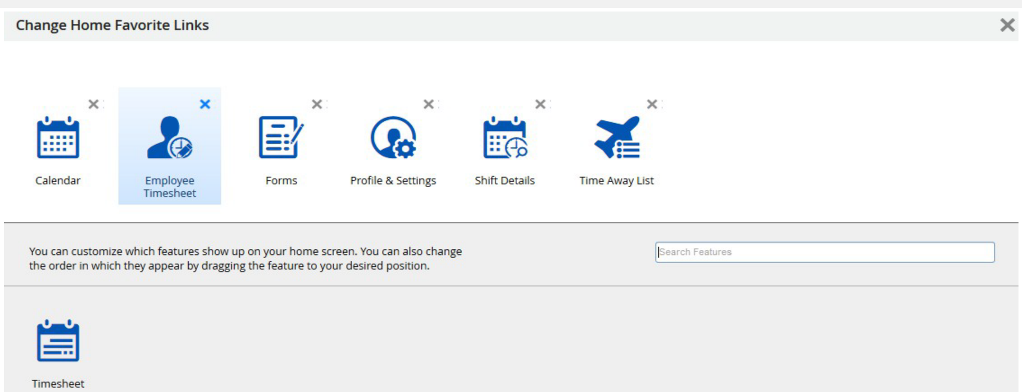


Home Screen

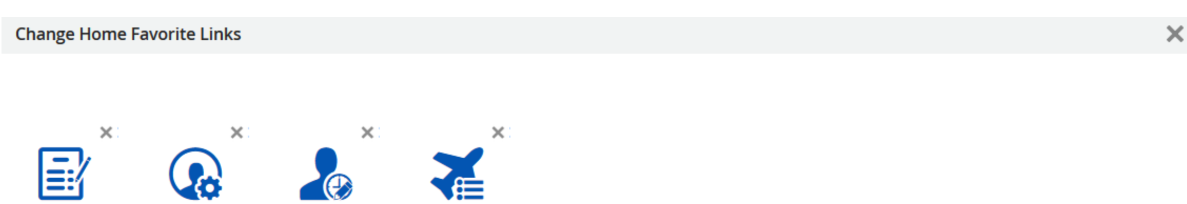
From the Home Screen you can quickly navigate to frequently used screens, review balances, upcoming schedules etc.

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

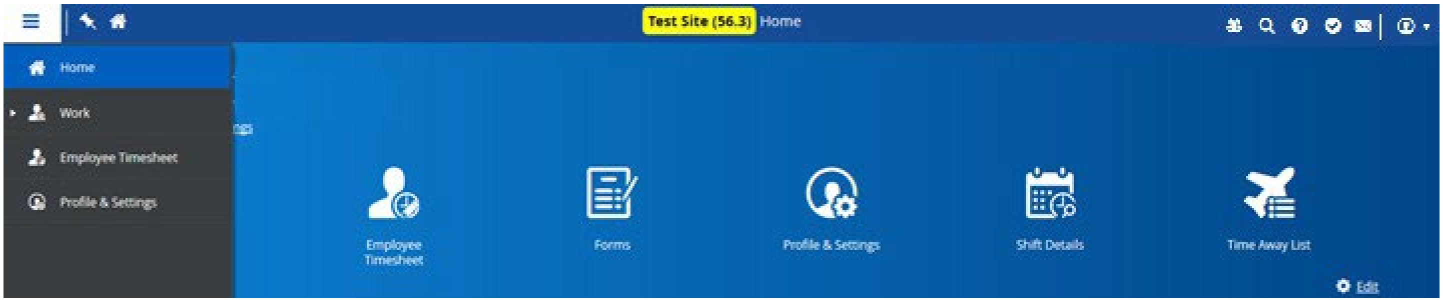




In this window, you can move Icons around and remove anything you don't want. Once you are done with your changes you can Save your changes, or Restore the Default Settings from the bottom right corner of the window:



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

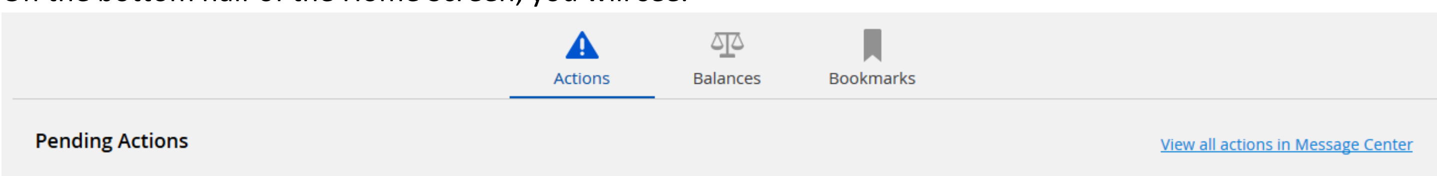
 Help

 Approvals

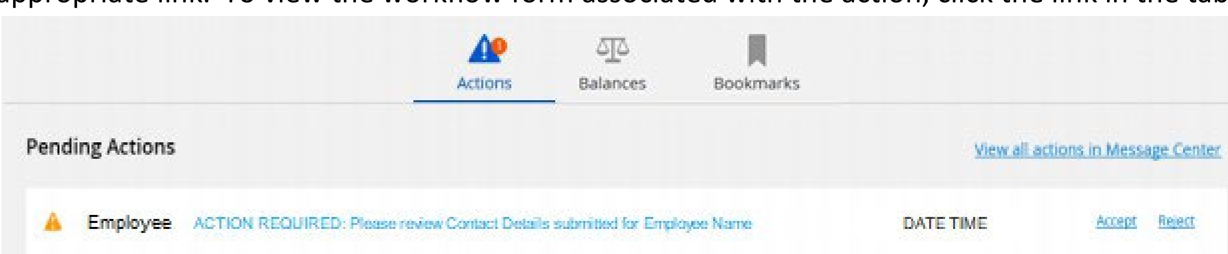
 Message Centre

 Profile/Settings & Logout

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



: 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:

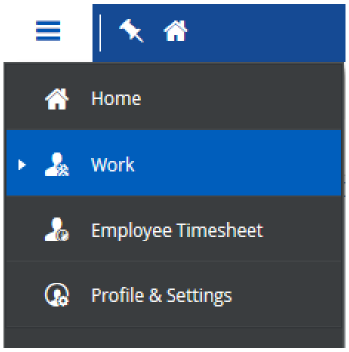


: Show balance details including amounts that employees have accrued, pending, remaining etc.

: Show links to your frequently access websites

Navigation Panel

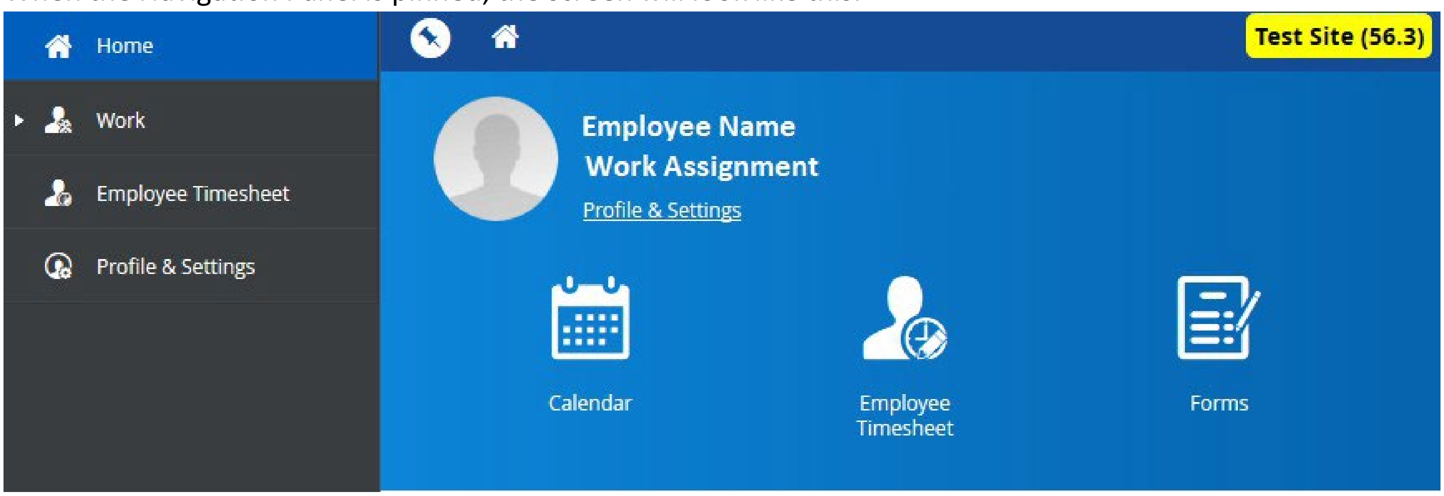
The navigation panel displays all the features that you can access. It is displayed to the far left of the screen, and is always available (even it is hidden, or "unpinned").



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.

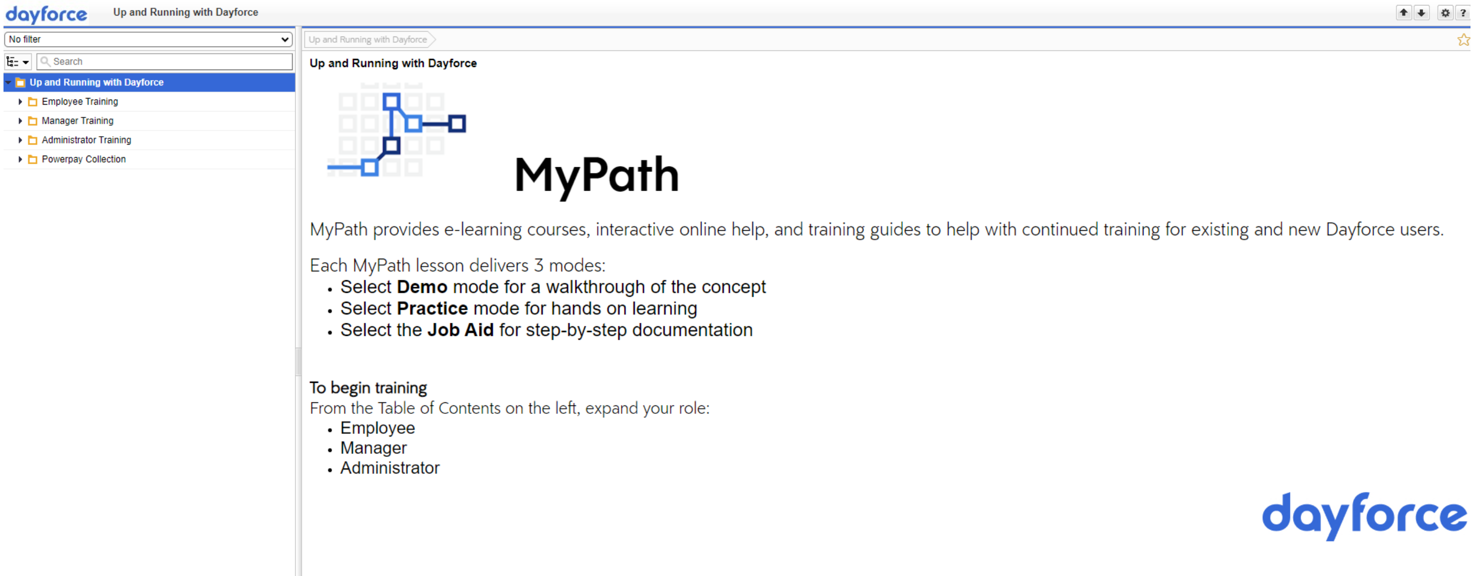
When the Navigation Panel is pinned, the screen will look like this:



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.



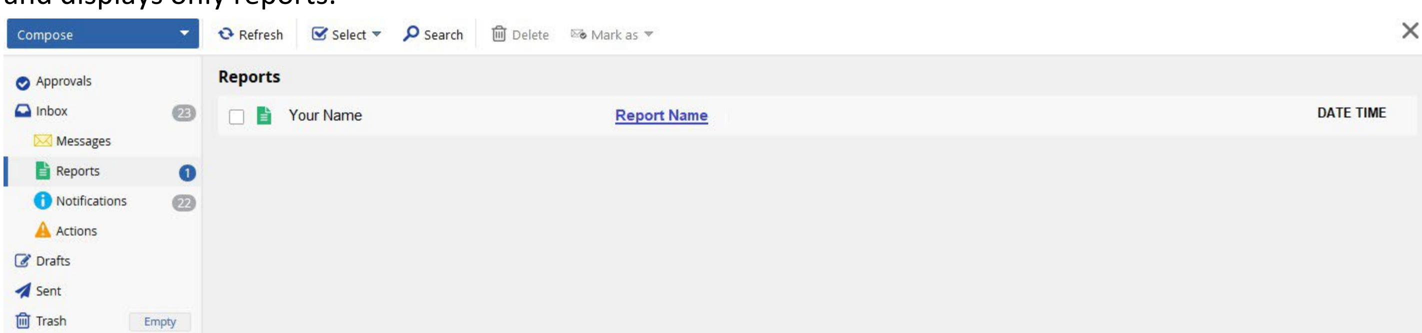
Message Centre

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

View Messages

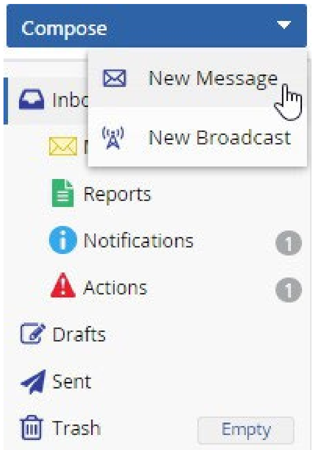
By Default, the application displays all messages (including notes, broadcasts, reports, and actions) when you open **Message Centre**. If necessary, you can click one of the filter buttons beneath the **Inbox** tab to view a specific type of message.

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



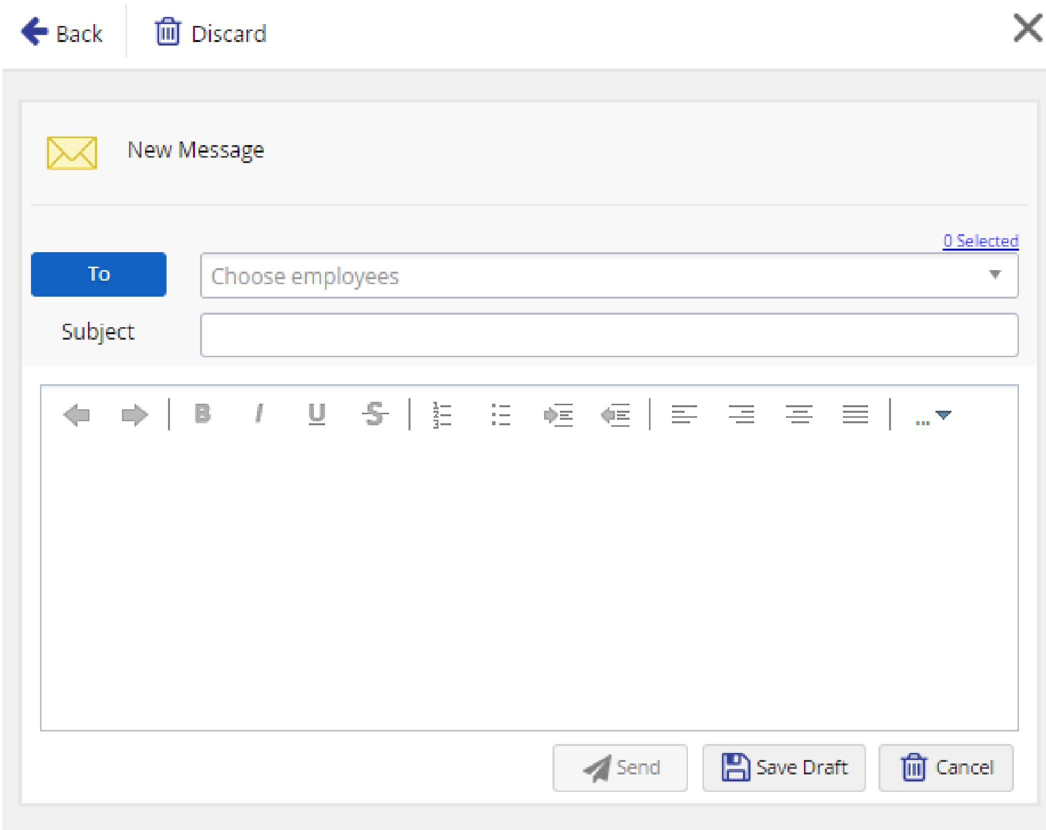
Send Messages

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:



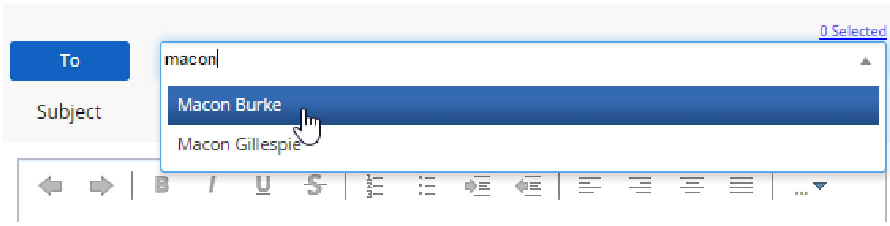
In the example above, the user has access to send both messages and broadcasts. If they only had access to send messages, the application would only display the **New Message** option in the list.

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



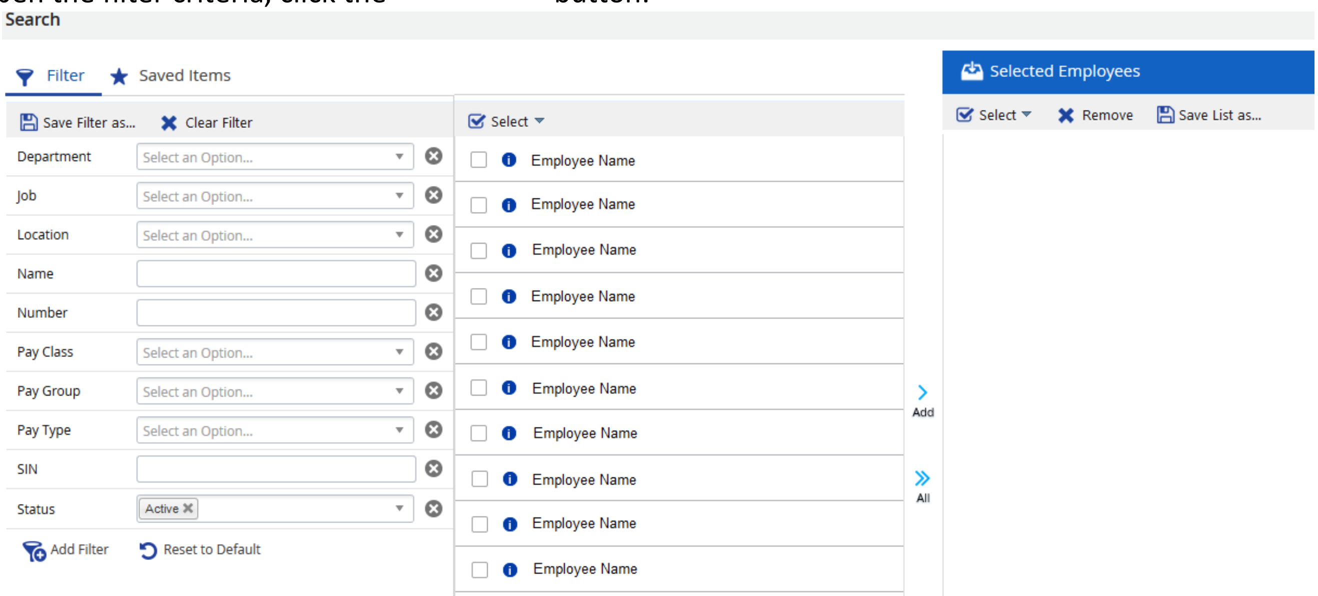
You can select your recipients in two ways:

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

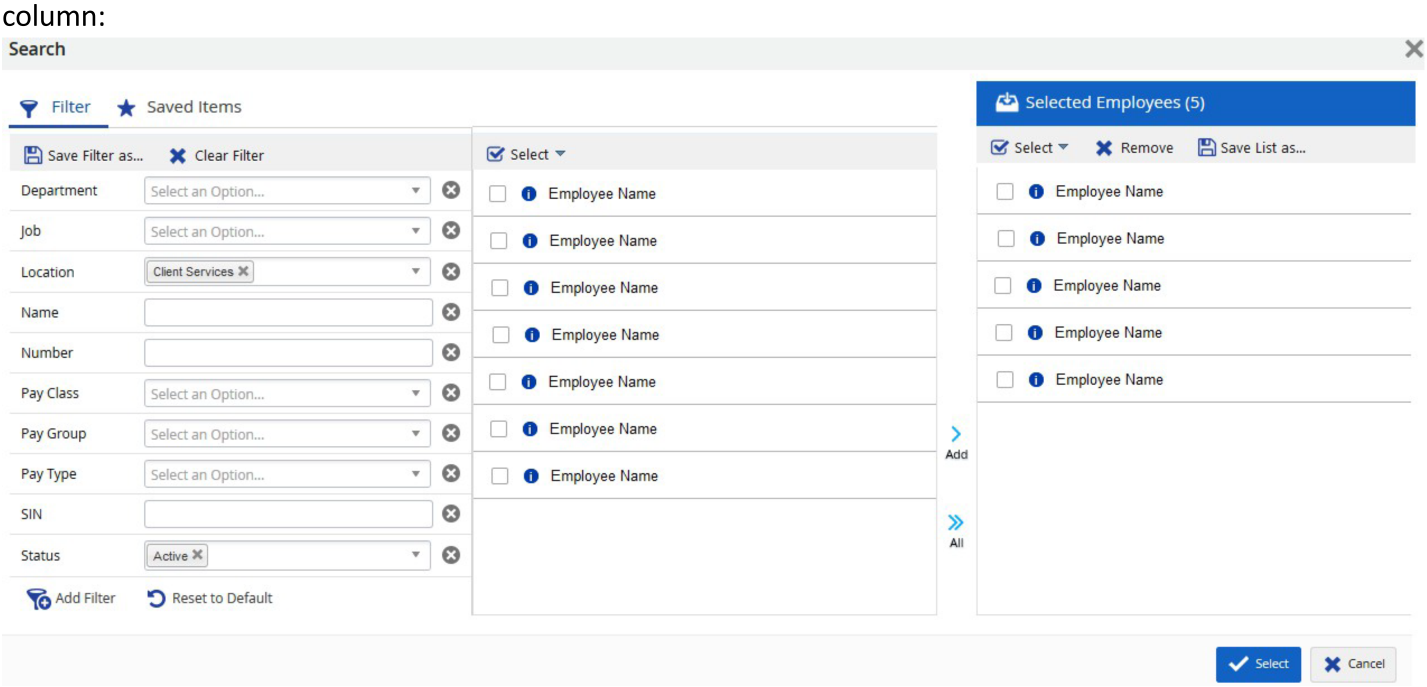


2) If you must send a communication to a large audience, you can use filters to find the necessary recipients.

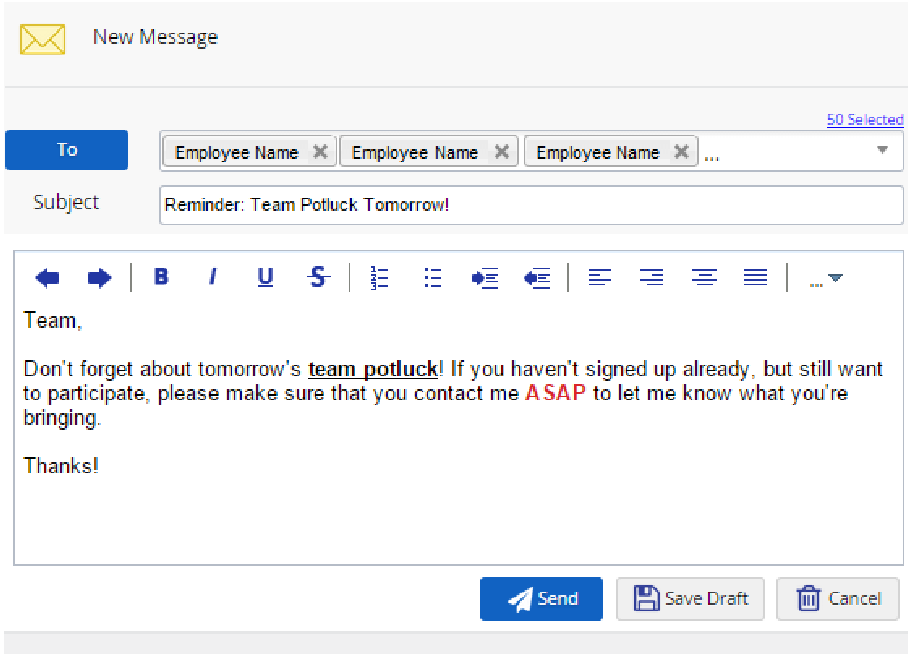
To open the filter criteria, click the  button:



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:

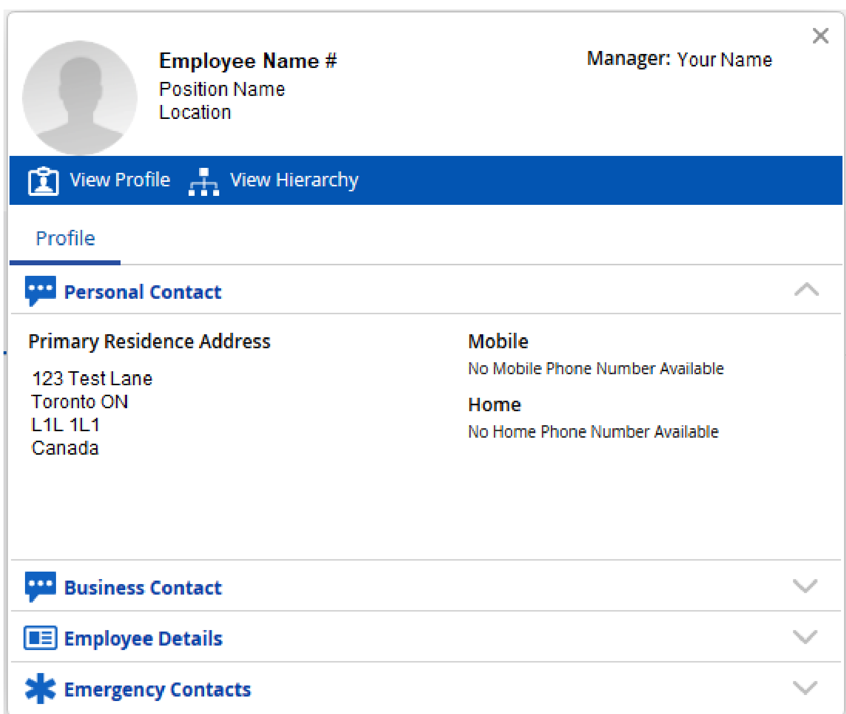


Once you have selected all the necessary users, you can compose your message. The application provides text formatting controls for messages and broadcasts, so that you can format your message as necessary:



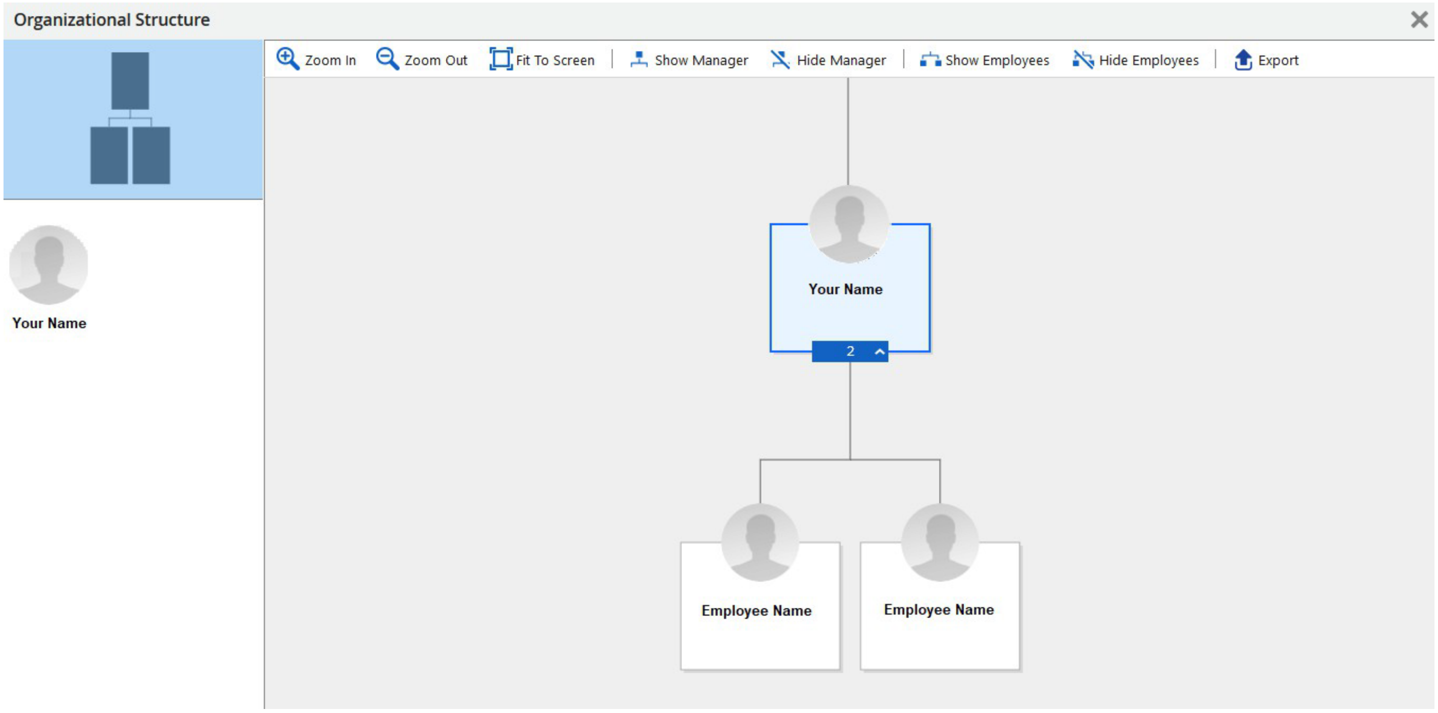
Your Team

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



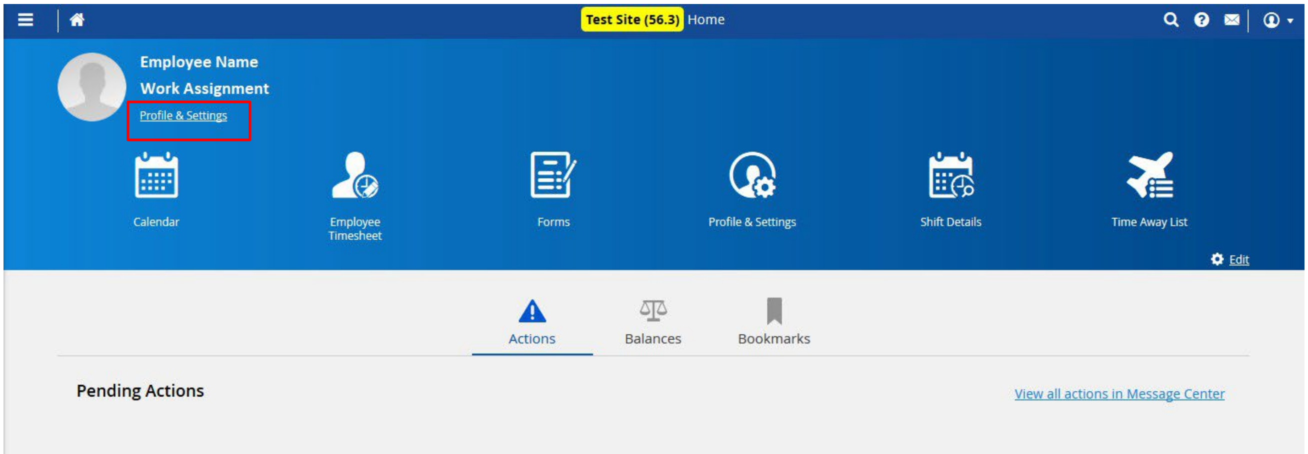
Click on View Profile from the Employee Card to take you to the employee's profile in People.

Click on View Hierarchy to view the organization hierarchy.

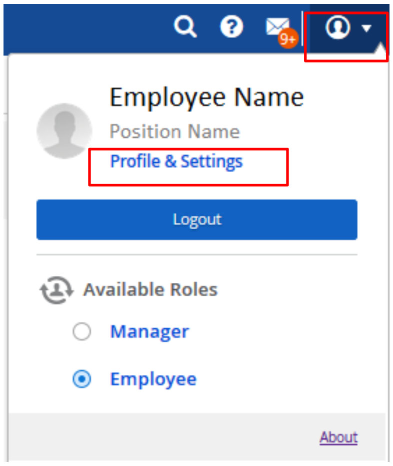


Profile and Settings

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

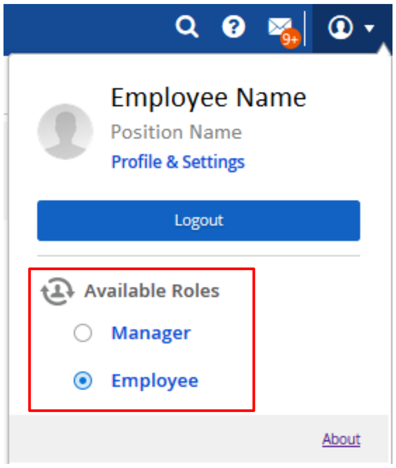


Or by clicking on the Profile and Settings through the Top Right Icon:



Switching Roles

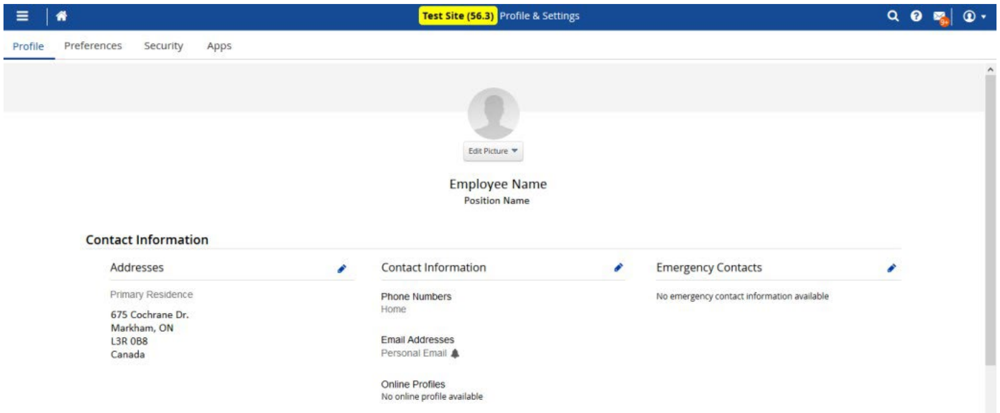
The application displays any other roles you've been assigned. When you select one of them, the application reloads and displays the features you're assigned access for that role.



Profile

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

- Add/Edit Display Picture
- Update Contact Information



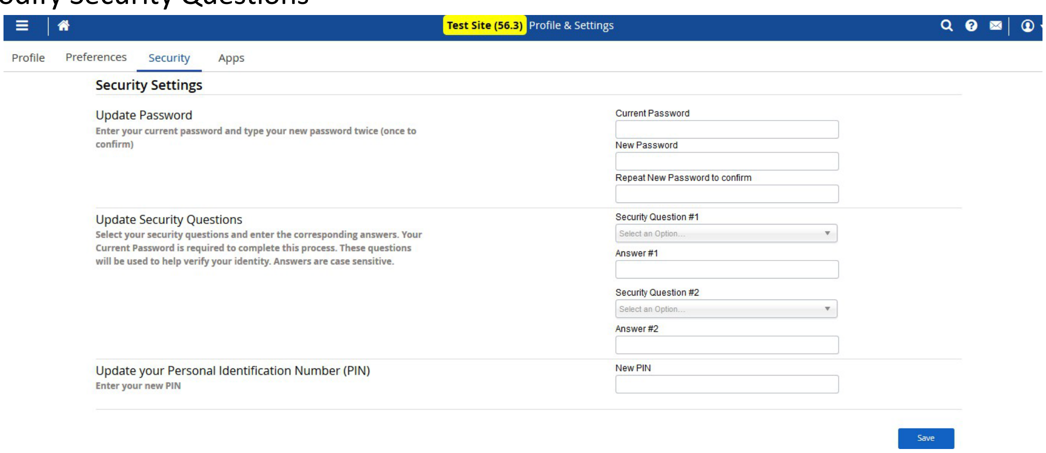
Preferences

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

Security

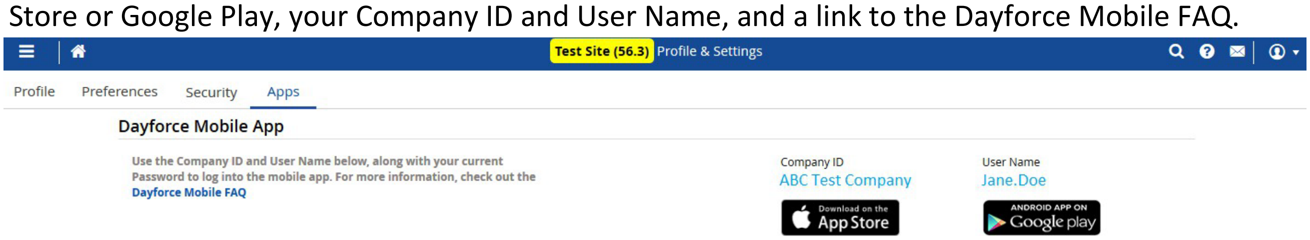
You can update your security settings

- 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

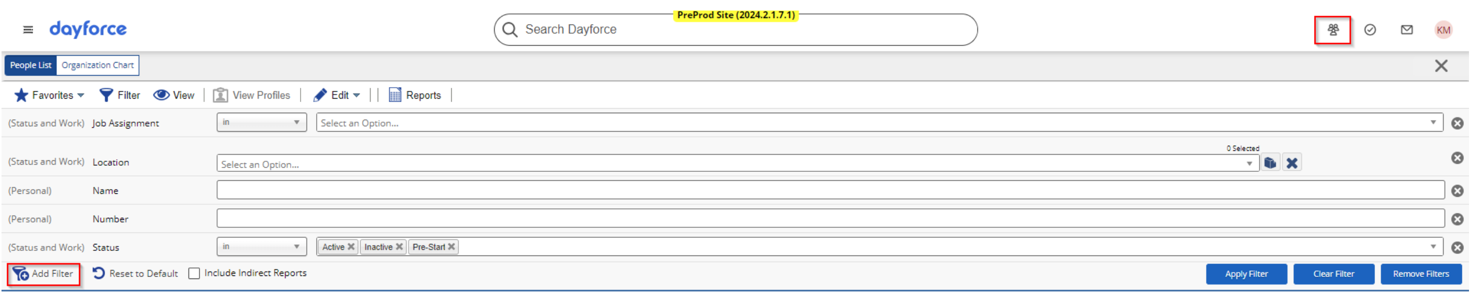
Once you have setup your employees in the application, you need to maintain their records to ensure they are accurate and up-to-date.

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:

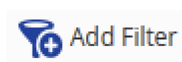
Filter Employee Records

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:

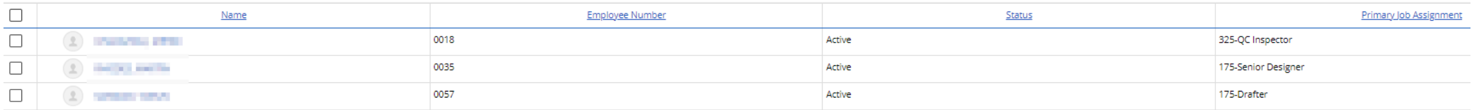
If you would like to modify your filter options, click on the 

Icon and check off any options you would like to use.

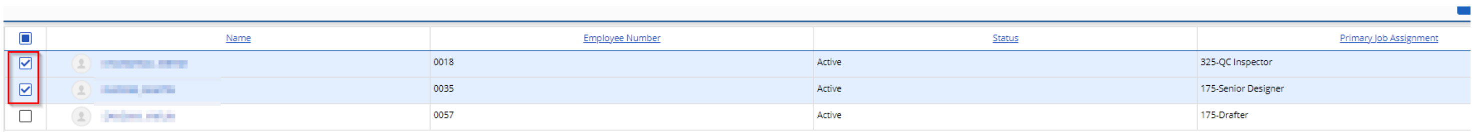
View Employee Records

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:

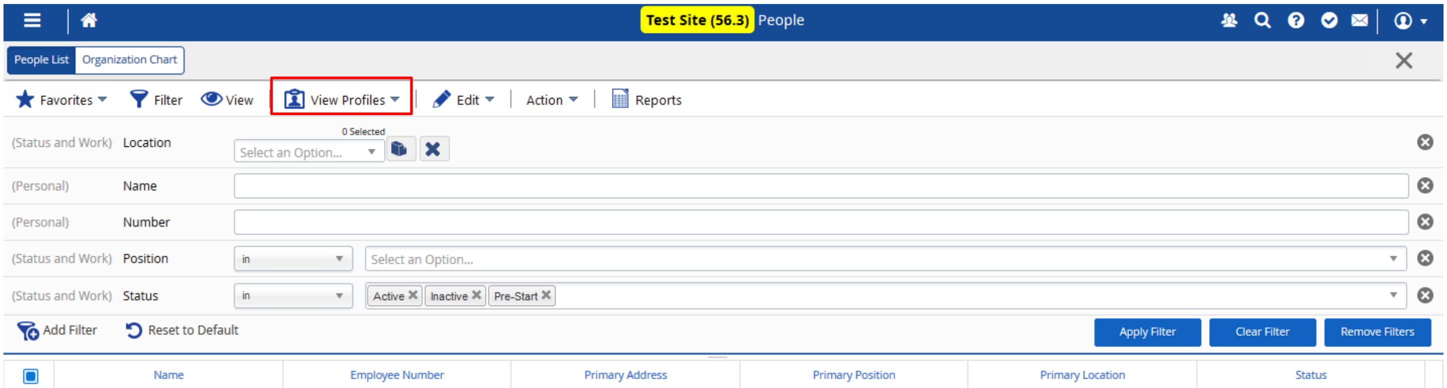


To load multiple employee records, complete the following steps:



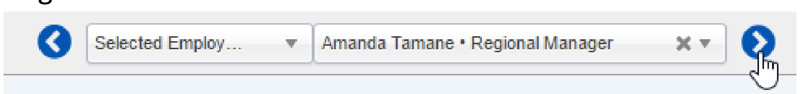
1. Select the checkboxes next to the records you want to open:

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

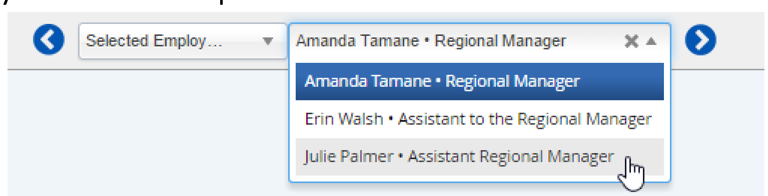


1. Navigate between the profiles you've selected by doing one of the following actions:

- 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.

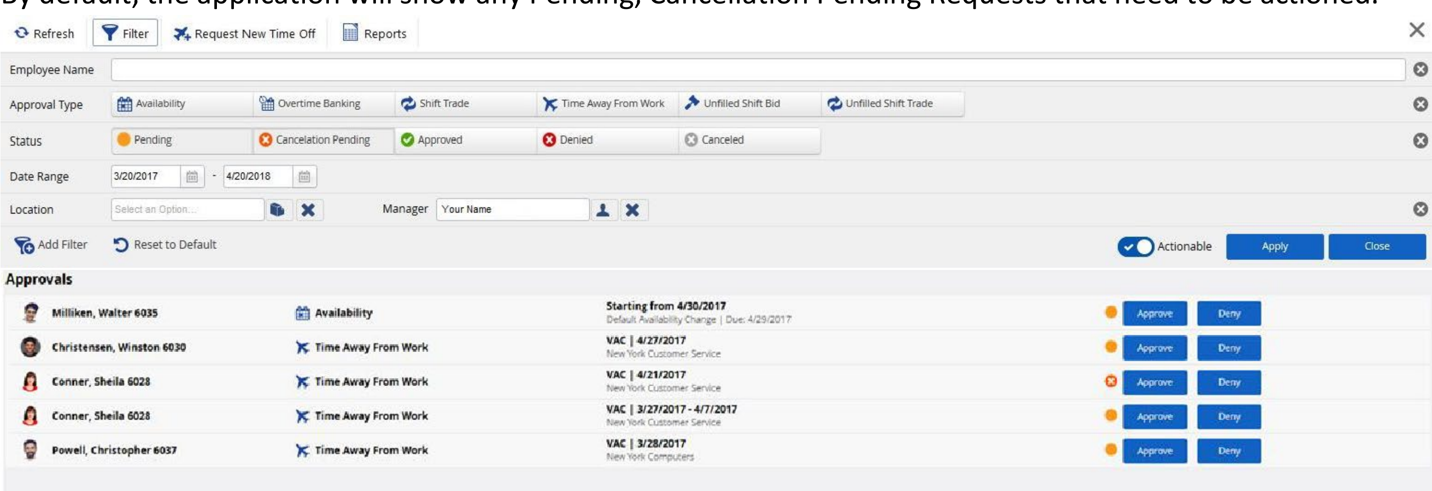
If your company uses Scheduling, please see the Introducing Schedules Document.

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.

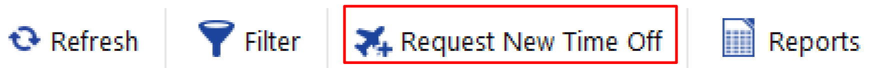


You can simply Approve or Deny the request or you can click on the request to view the details. The details of the request depend on the type of request.

Enter Time Off Request

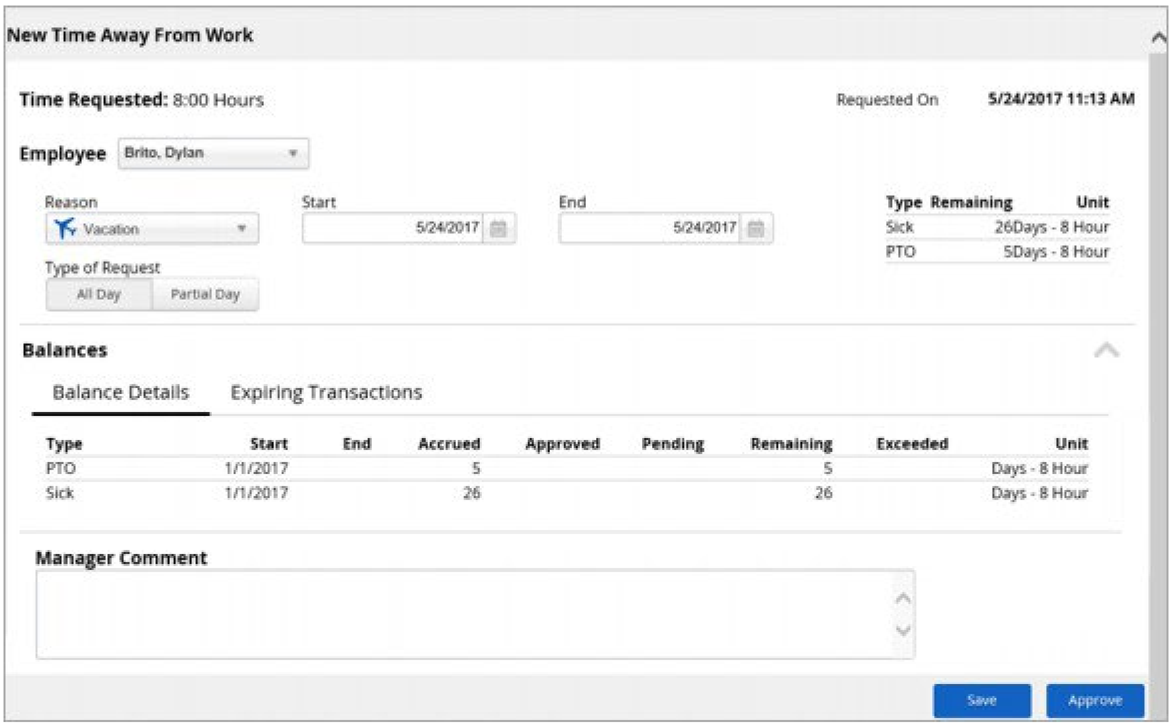
To create a new Time Away From Work Request in the **Approvals** screen, complete the following steps:

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:



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.

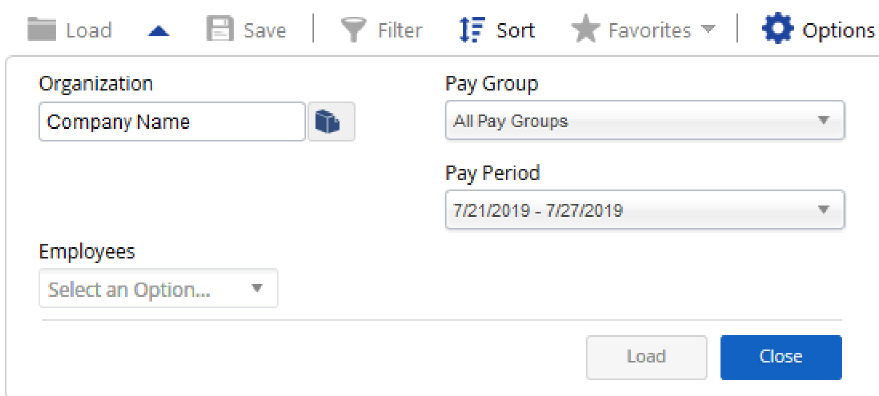
Timesheets

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.

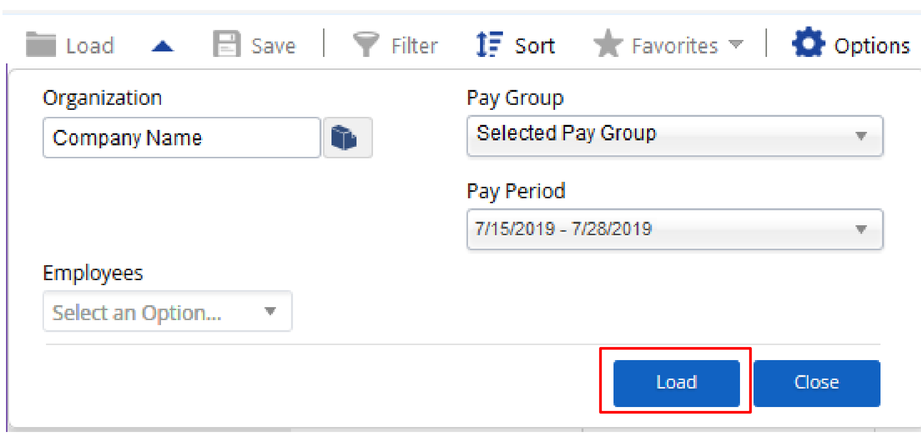
Load Timesheets

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

A dialog opens displaying additional loading options:

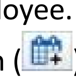


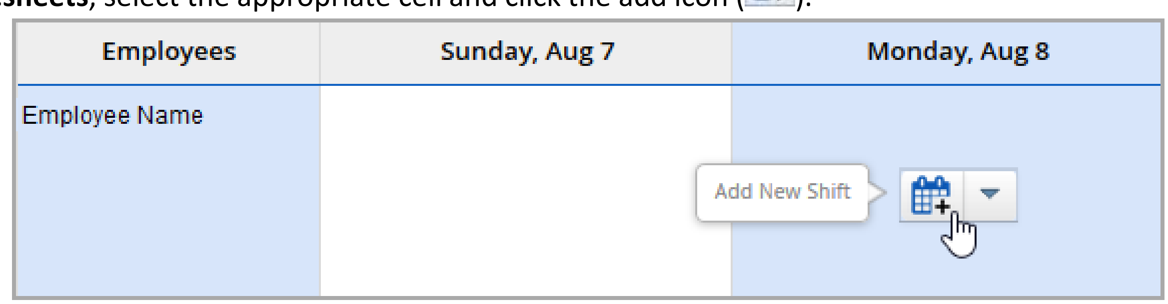
2. Select a Pay Group and a Pay Period from the corresponding drop-down lists.
3. Click the **Load** button display appropriate information:



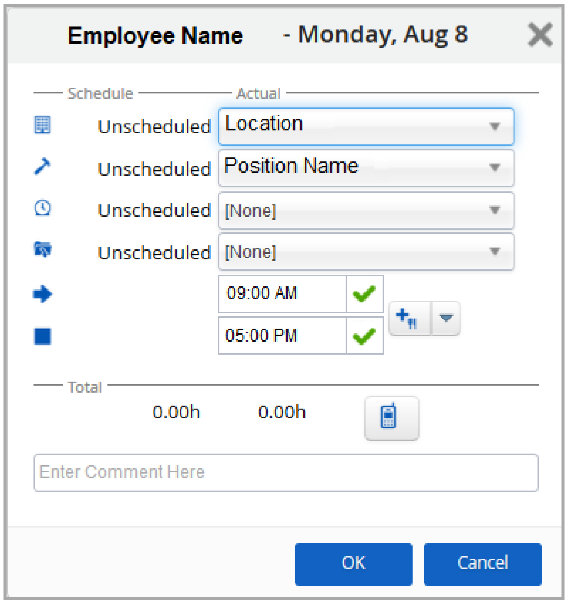
Add Shifts

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

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



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



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 suing 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.

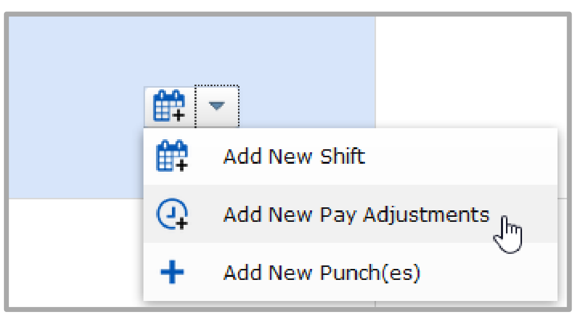
5. When you are finished creating the new shift, click the **OK** button. The application closes the dialog box and adds the shift to the timesheet.

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

Add Pay Adjustments

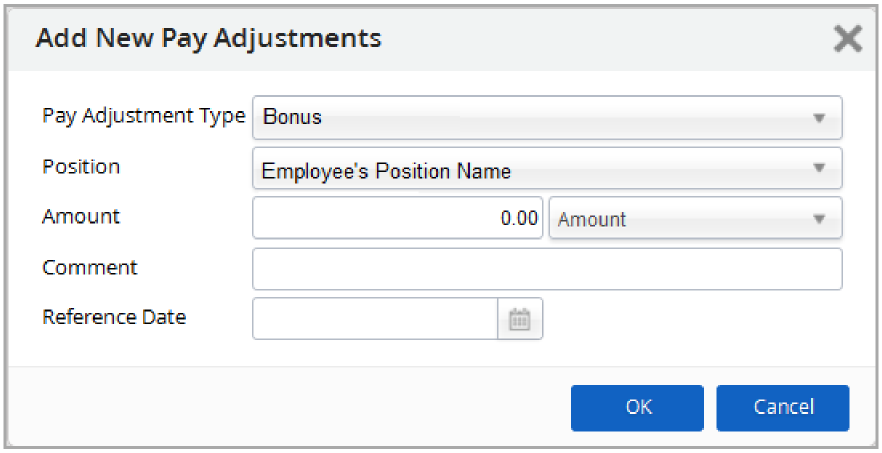
You can add amounts or hour-based pay adjustments for employees on the timesheets.

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**.

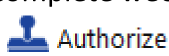
The dialog Add New Pay Adjustments dialog box opens:



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

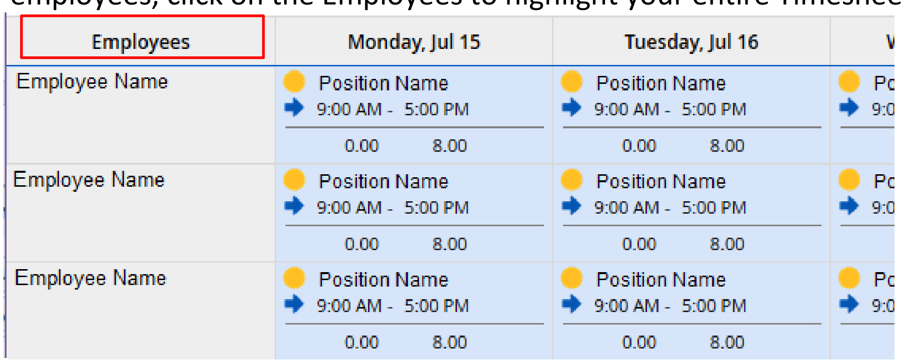
You will need to authorize an employee's shift for those hours to be sent over to Powerpay.

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 

.

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:



Click on the Authorize Icon