

dayforce

Documents Guide

Dayforce Powerpay Self Service with Powerpay People

August 2021

Table of Contents

- Self Service with Powerpay People 3
 - Self Service Task Pane 3
 - To Do List3
 - View a document in the To Do List4
 - Sign-off on a document in your To Do List5
- Self Service Documents 7
 - Upload a Document7
 - Sign a document requiring a signature 10
 - Delete an existing document 13
 - Download a document..... 13
 - Edit a document..... 14
 - Preview a document 15

Self Service with Powerpay People

Self Service Task Pane

When you log into Self Service the Task pane displays your To Do List and a History of completed items.

To Do List

The screenshot shows the 'Powerpay Self Service' interface. At the top, there is a navigation bar with a menu icon, a home icon, and the text 'Powerpay Self Service'. Below this, a user profile is displayed for 'Jack A' with ID '00000003' and a 'Profile & Settings' link. A 'To Do List' icon is visible on the left. The main content area is titled 'Welcome to Powerpay Self Service' and contains two tabs: 'To Do List' (active) and 'History'. The 'To Do List' tab displays a table with the following data:

Status	Name	Action	Due Date
	Handbook	View	
	Offer letter	Requires review/sign-off	11/06/2019
	Employee Handbook	Requires review/sign-off	06/06/2020
	Performance Review	View	
	Welcome Letter	View	

At the bottom of the interface, there is a footer: '© Ceridian Canada Ltd. All Rights reserved.'

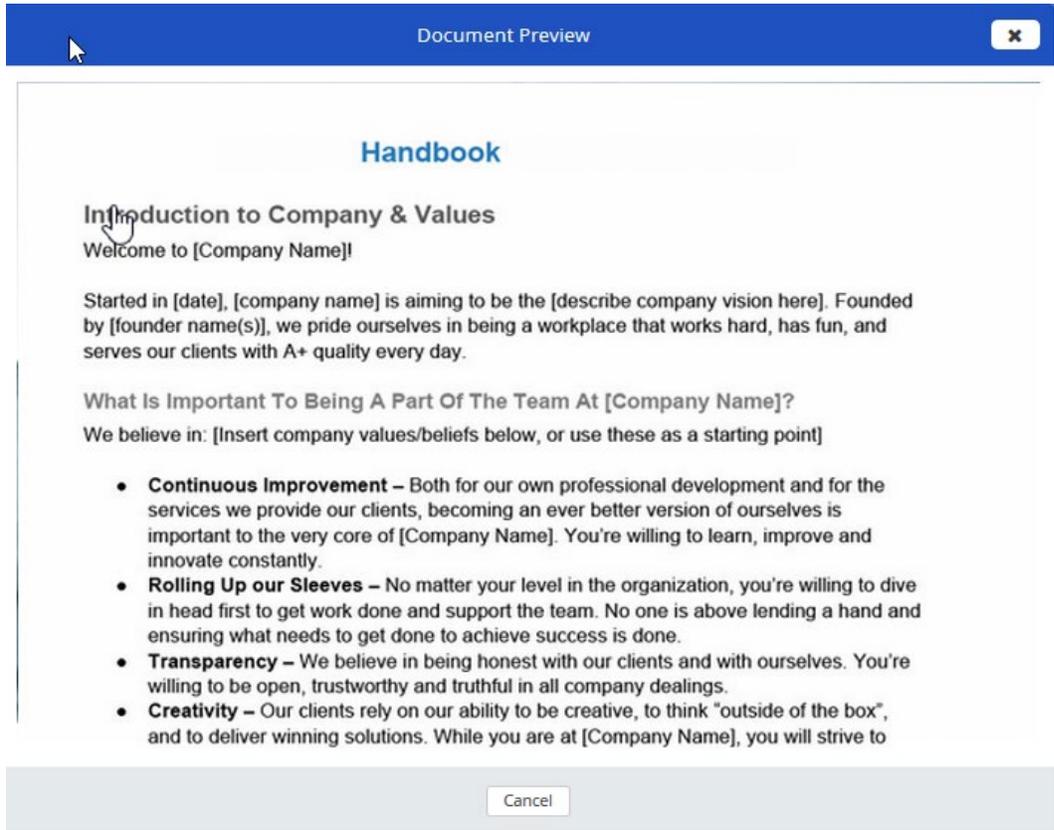
Each item displays in a separate row, with the following information:

- **Status** – One of three status types displays depending on the status of the task:
 - To Do (yellow),
 - New (blue)
 - Overdue (red)
- **Name** – The name of the task. Click on the name link to perform the action.
- **Action** – A description of the action required.
- **Due Date** – If an expiry or due date was placed on the action, the date displays.

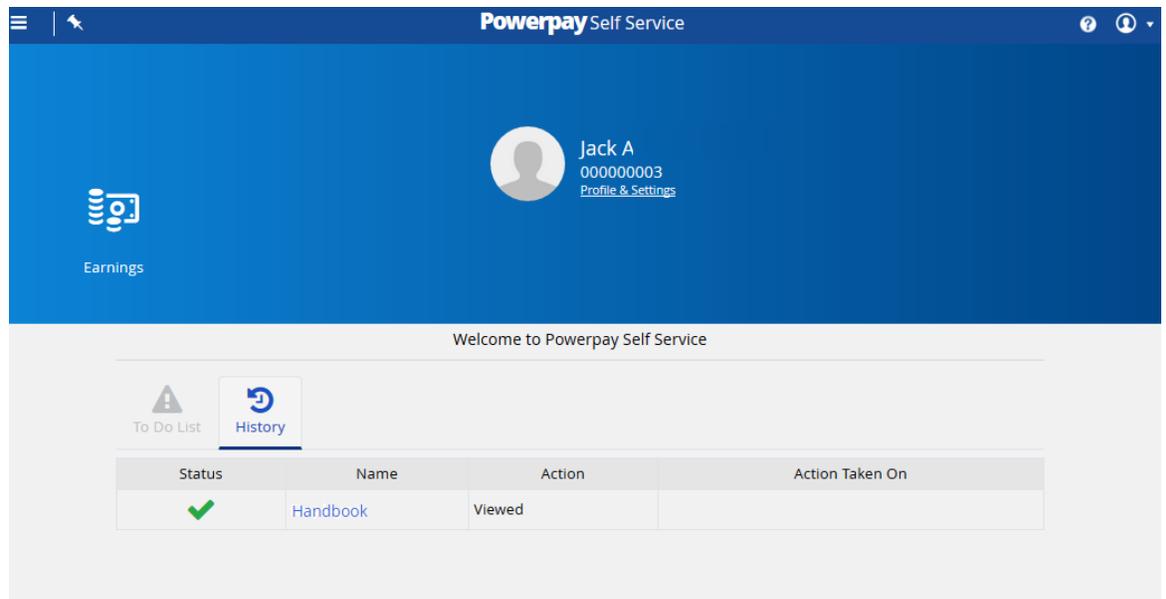
To complete an action, click on the link for the action in the Name column.

View a document in the To Do List

- ▶ To view a document in your To Do List:
 1. From the Home page, click on the document name link in the Name column. A Preview window opens.



2. Review the document.
 3. Click **Close**.
- After you have viewed the document, the task is removed from the To Do List and displays in the History tab. A green checkmark displays in the Status column for the document.



Sign-off on a document in your To Do List

- ▶ To review and sign-off on a document from your To Do List:
 1. From the Home page, click on the document name link for the document requiring sign-off in the Name column.
A Preview window opens.

Document Preview✕

Handbook

Introduction to Company & Values

Welcome to [Company Name]!

Started in [date], [company name] is aiming to be the [describe company vision here]. Founded by [founder name(s)], we pride ourselves in being a workplace that works hard, has fun, and serves our clients with A+ quality every day.

What Is Important To Being A Part Of The Team At [Company Name]?

We believe in: [Insert company values/beliefs below, or use these as a starting point]

- **Continuous Improvement** – Both for our own professional development and for the services we provide our clients, becoming an ever better version of ourselves is important to the very core of [Company Name]. You're willing to learn, improve and innovate constantly.
- **Rolling Up our Sleeves** – No matter your level in the organization, you're willing to dive in head first to get work done and support the team. No one is above lending a hand and ensuring what needs to get done to achieve success is done.
- **Transparency** – We believe in being honest with our clients and with ourselves. You're willing to be open, trustworthy and truthful in all company dealings.
- **Creativity** – Our clients rely on our ability to be creative, to think "outside of the box", and to deliver winning solutions. While you are at [Company Name], you will strive to

I acknowledge that I have read, understood and agree to the content of this document.

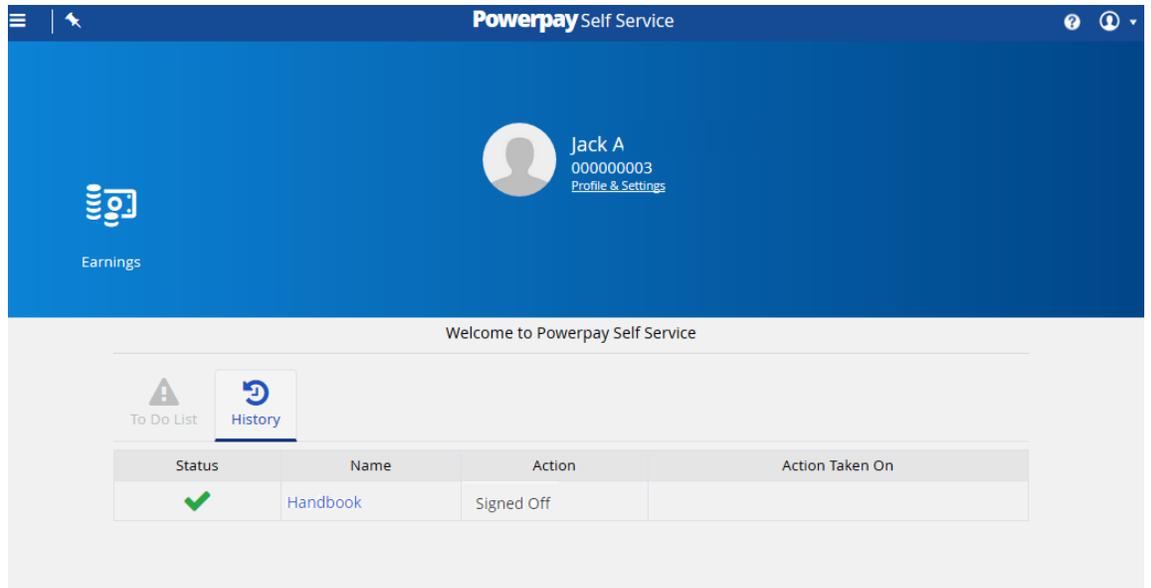
SaveCancel

2. Click the **I acknowledge that I have read, understood and agree to the content of this document** checkbox.

3. Click **Save**.

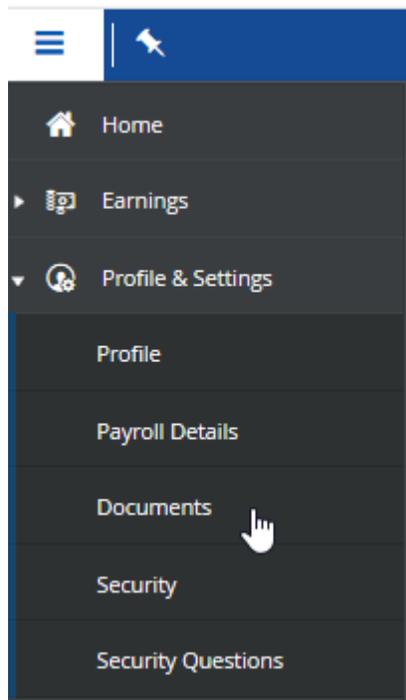
Once the document is signed:

- the value in the Signed/Signature column displays **Yes** on the Documents page (**Profile & Settings > Documents**)
- the task is moved to the History tab. A green checkmark displays in the Status column, the Action is updated to reflect the current status of the item and the date the action was taken displays.



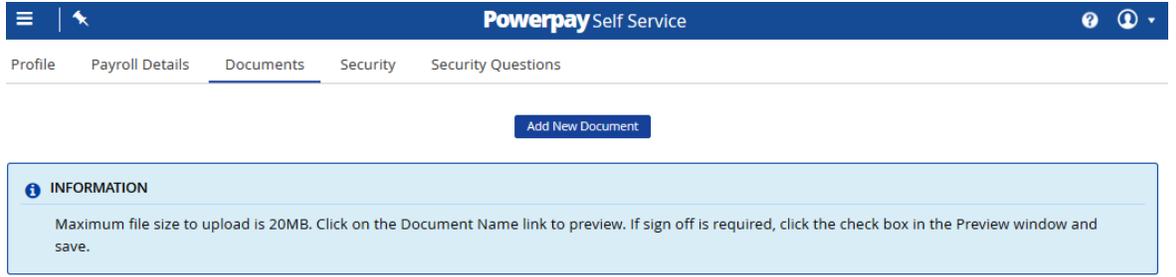
Self Service Documents

Use the Self Service Documents page ([Profile & Settings > Documents](#)) to upload, edit and preview documents.

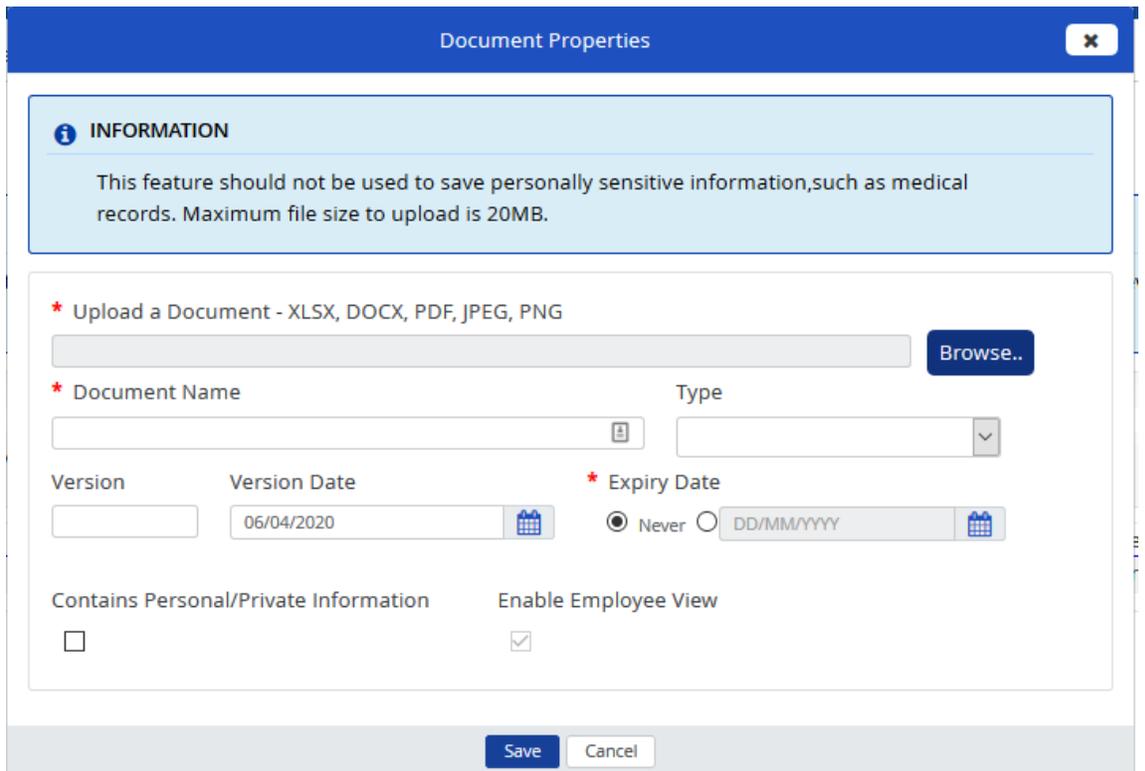


Upload a Document

- ▶ To upload a new document:
 1. Navigate to the Documents page ([Profile & Settings > Documents](#)).



2. Click the **Add New Document** button.
The Document Properties window opens.



3. Click the **Browse** button to select the document to upload.
The following document types can be uploaded: .xlsx, .docx, .pdf, .jpeg and .png.
4. Select the file to upload and click **Open**.
The selected file displays in the **Document Name** field. You can rename the document if required.

Document Properties ✕

INFORMATION

This feature should not be used to save personally sensitive information, such as medical records. Maximum file size to upload is 20MB.

*** Upload a Document - XLSX, DOCX, PDF, JPEG, PNG**

DrivesLicense.png Browse..

*** Document Name** **Type**

Version **Version Date** *** Expiry Date** Never DD/MM/YYYY

Contains Personal/Private Information **Enable Employee View**

Save
Cancel

5. (optional) Select the document type from the **Type** list.
6. (optional) Enter a version number for the document.
7. (optional) Select or enter the version date.
8. Set the document expiry date.
9. (optional) If the document contains personal identifiable information (PII) such as a birth certificate or driver's license, select the **Contains Personal/Private Information** checkbox.
10. Click **Save**.

The document is added to the list on the Documents page.

☰
Powerpay Self Service ? ⓘ

Profile
Payroll Details
Documents
Security
Security Questions

Add New Document

INFORMATION

Maximum file size to upload is 20MB. Click on the Document Name link to preview. If sign off is required, click the check box in the Preview window and save.

0.3 MB (0.12%) of 250 MB storage has been used.

Type	Document Name	PII	File	Signature	Size (MB)	Created By	Last Updated	Expires	Action
	DrivesLicenseAB	Yes	PNG	N/A	0.3	Jack123	06/04/2020	05/04/2021	⚙️ 📄 🗑️
	Handbook	No	JPG	Yes	< 0.1	Jack123	28/02/2020	Never	⚙️ 📄 🗑️

Repeat these steps to add additional documents.

Note: There is a 250 MB size storage limit for all documents. The progress bar at the top of the page indicates the amount of storage available. The size limit per single document is 20MB.

Each document uploaded displays in a separate row, with the document's properties.

The following information is displayed:

- **Type** – the Document Type specified when the document was uploaded.
- **Document Name** – the file name specified when the document was uploaded. Open the document by clicking on the linked file name.
- **PII** – indicates if the document includes personal or identifiable information (i.e., the **Contains Personal/Private Information** checkbox was selected when the document was uploaded).
- **File** – the file type (e.g., PDF, docx, jpeg, etc.).
- **Signed/Signature** – indicates if the document requires signoff or if the document has been signed.

When a document is assigned to you by the payroll administrator it may require your signoff. For information on signing documents see “Sign a document requiring a signature,” page 10.

- **Version** – the version number assigned to the document when the document was uploaded or edited.
- **Size (MB)** – the file size in megabytes.
- **Last Updated** – the date and time that the file was last modified.
- **Expires** – the date the document is set to expire. The expire date is assigned when the document is uploaded or edited.
- **Action** – edit, download or delete the document.

Sign a document requiring a signature

The Documents page includes all documents uploaded by you and all documents assigned to you by your payroll administrator. Some documents assigned by your payroll administrator may require you to sign the document. Documents that require your signature display the text **Required** in the Signed/Signature column.

Powerpay Self Service

Profile Payroll Details **Documents** Security Security Questions

[Add New Document](#)

INFORMATION

Maximum file size to upload is 20MB. Click on the Document Name link to preview. If sign off is required, click the check box in the Preview window and save.

0.3 MB (0.12%) of 250 MB storage has been used.

Type	Document Name	PII	File	Signature	Size (MB)	Created By	Last Updated	Expires	Action
	DrivesLicenseAB	Yes	PNG	N/A	0.3	Jack123	06/04/2020	05/04/2021	Settings Download Delete
	Handbook	No	JPG	Yes	< 0.1	Jack123	28/02/2020	Never	Settings Download Delete

► **To sign a document:**

1. Navigate to the Documents page (**Profile & Settings > Documents**).

Powerpay Self Service

Profile Payroll Details **Documents** Security Security Questions

[Add New Document](#)

INFORMATION

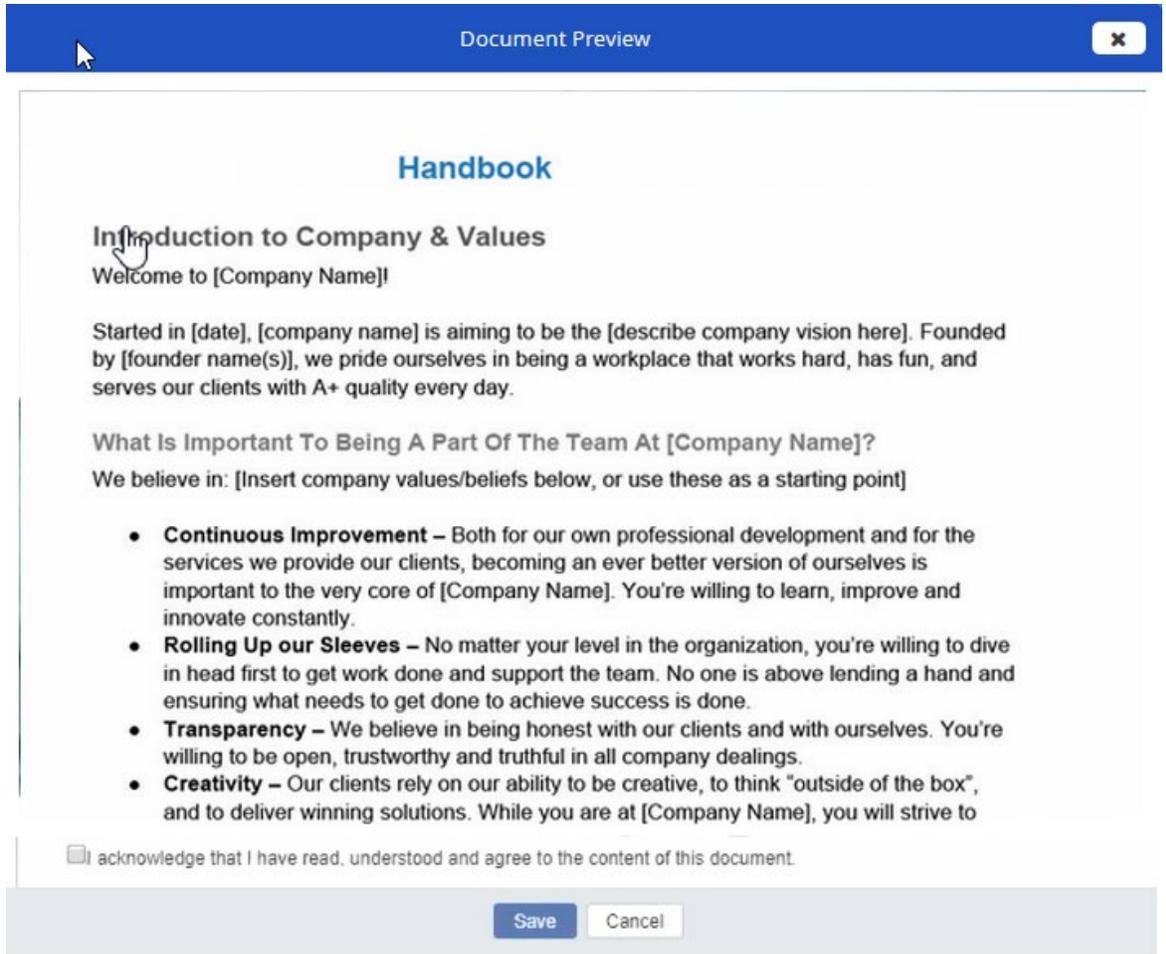
Maximum file size to upload is 20MB. Click on the Document Name link to preview. If sign off is required, click the check box in the Preview window and save.

0.3 MB (0.12%) of 250 MB storage has been used.

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	DrivesLicenseAB	Yes	PNG	N/A	0.3	Jack123	06/04/2020	05/04/2021	Settings Download Delete
	Handbook	No	JPG	Yes	< 0.1	Jack123	28/02/2020	Never	Settings Download Delete

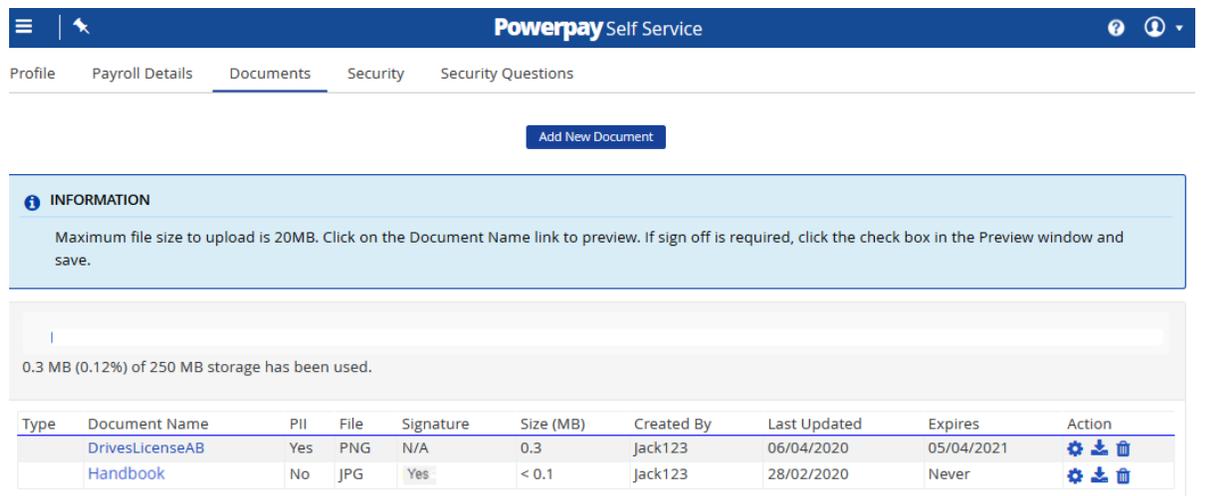
2. Click on the **Required** link in the Signed/Signature column for the document to sign.

A Document Preview window displays.



3. Click the I acknowledge that I have read, understood and agree to the content of this document checkbox.
4. Click **Save**.

Once the document is signed, the value in the Signed/Signature column displays **Yes**.



Delete an existing document

Note: Documents added by your payroll administrator cannot be edited or deleted.

► To delete an existing document:

1. Navigate to the Documents page (Profile & Settings > Documents).

Profile Payroll Details **Documents** Security Security Questions

Add New Document

INFORMATION
Maximum file size to upload is 20MB. Click on the Document Name link to preview. If sign off is required, click the check box in the Preview window and save.

0.3 MB (0.12%) of 250 MB storage has been used.

Type	Document Name	PII	File	Signature	Size (MB)	Created By	Last Updated	Expires	Action
	DrivesLicenseAB	Yes	PNG	N/A	0.3	Jack123	06/04/2020	05/04/2021	
	Handbook	No	JPG	Yes	< 0.1	Jack123	28/02/2020	Never	

2. Click the trash can button in the Action column for the document to delete. A confirmation message displays.

Confirm Delete

WARNING
Are you sure you want to delete this document?

Delete Cancel

3. Click Delete.

The document is permanently deleted.

Download a document

► To download an existing document:

1. Navigate to the Documents page (Profile & Settings > Documents).

2. Click the download button  for the document to download to your system. The document downloads.

Edit a document

Note: Documents added by your payroll administrator cannot be edited or deleted.

Use the edit feature to update document properties or replace the existing document. This is useful in cases where the document has been updated since it was uploaded, or where you accidentally upload the wrong document.

Once you upload a new file or link, the application deletes the previous one.

► **To edit an existing document:**

1. Navigate to the Documents page (**Profile & Settings > Documents**).

2. Click the properties button  in the Action column for the document to edit. The Document Properties window opens.

Document Properties
✕

INFORMATION

This feature should not be used to save personally sensitive information, such as medical records. Maximum file size to upload is 20MB.

*** Upload a Document - XLSX, DOCX, PDF, JPEG, PNG**

DrivesLicense.png Browse..

*** Document Name** Type

DrivesLicenseAB ▼

Version **Version Date** *** Expiry Date**

1 04/04/2020 ○ Never ● 04/04/2021

Contains Personal/Private Information Enable Employee View

Save
Cancel

3. Make any required changes such as uploading a new version of the document or updating the expiry date.
4. Click **Save**.

Preview a document

► To preview a document:

1. Navigate to the Documents page (**Profile & Settings > Documents**).

☰
Powerpay Self Service
?

Profile
Payroll Details
Documents
Security
Security Questions

Add New Document

INFORMATION

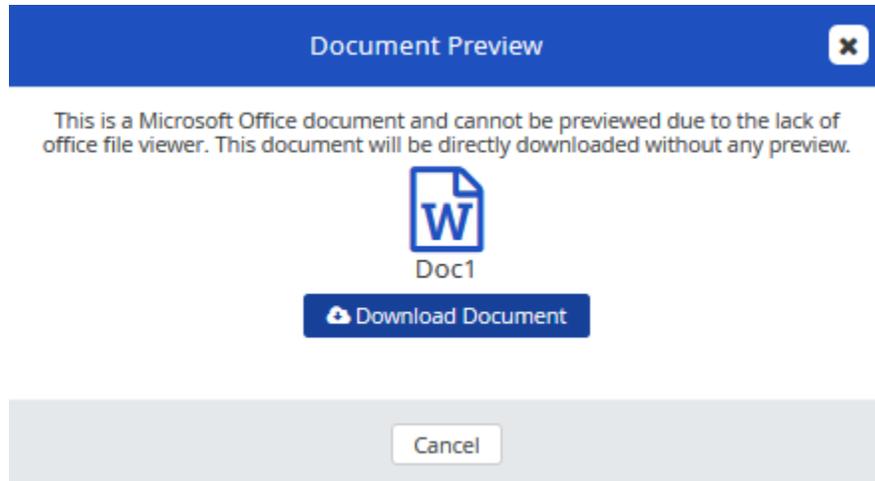
Maximum file size to upload is 20MB. Click on the Document Name link to preview. If sign off is required, click the check box in the Preview window and save.

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	Handbook	No	JPG	Yes	< 0.1	Jack123	28/02/2020	Never	⚙️ 📄 🗑️

2. Click the document name.

- For image or pdf documents, a window opens displaying a preview of the document.
- For Office documents, the documents are downloaded and can be viewed in the appropriate application. Click **Download Document**.



3. Click **Cancel** to close the preview window.