

Dayforce HCM Manager Guide

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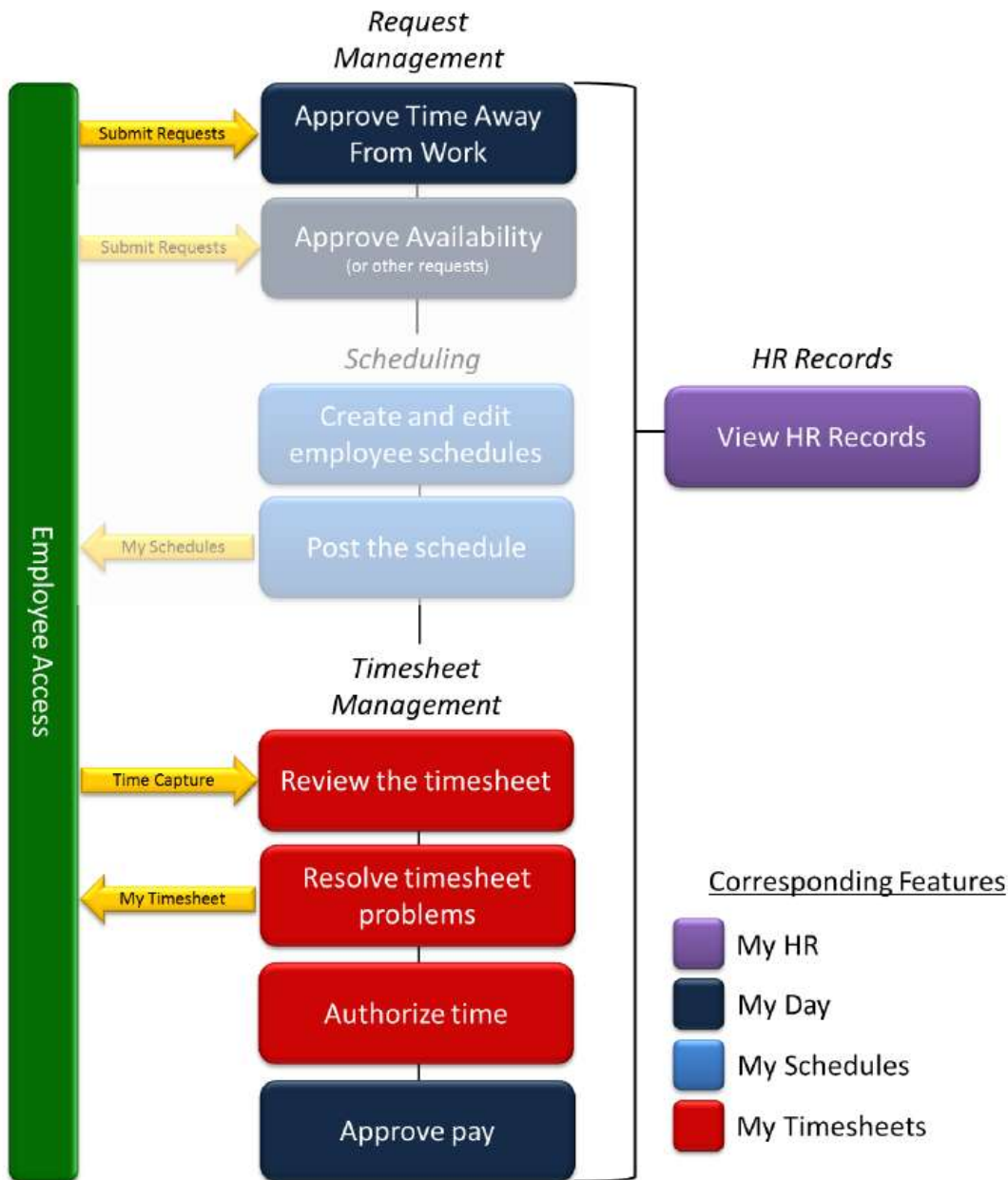
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Manager Tasks

Managers are responsible for many tasks within Dayforce. These tasks differ in complexity, but all serve an important purpose in maintaining employee records and ensuring employees are scheduled and paid appropriately.

The tasks outlined in this course are some of the most frequently-used manager tasks within Dayforce.

Not all organizations use exactly the same set of features or tasks to manage employees, but the processes tend to be quite similar between them.



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1. **HR Records** – Managers and administrators must review HR Records to ensure accuracy, as the other Dayforce functionality relies on the information from these records.
2. **Request Management** – Employees submit requests, such as Time Away from Work requests or Availability requests, and the manager must approve these requests in the My Day feature. This guide discusses how the approval process works for Time Away from Work requests.
3. **Scheduling** – Scheduling is an optional feature within Dayforce.
4. **Timesheet Management** – Timesheets are where an employee’s hours worked are tracked. Managers ensure that the timesheets are accurate and correct any problems on them, such as missed punches or pay adjustments. Timesheets are discussed in this guide.

After the pay is approved by the manager, the timesheet information is used by Payroll and Benefits Administrators to calculate pay and commit the pay run.

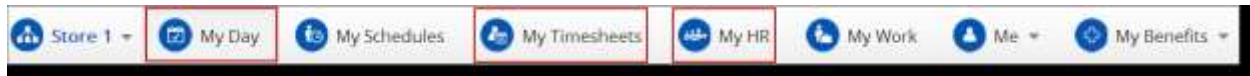
In summary, this guide is focused on the following manager tasks:

HR Records – Ensure that HR records are up-to-date.

Request Management – Approve employee requests.

Timesheets – Ensure that employee time worked is recorded accurately.

These manager tasks are completed using three features within the application:



Feature	Associated Tasks
My Day	Manage employee requests, approve employee pay.
My HR	Maintain employee HR records.
My Timesheets	Review employee punches and timesheets.

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Log In as a Manager

This section discusses how to log in as a manager and view the key features used by Manager within the application for Time and Attendance.

Dayforce HCM Login

All users, regardless of role, log into Dayforce from the same login screen.



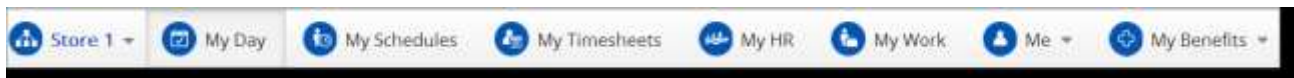
Navigation begins at the **Login** screen. This screen may be accessed through a web browser by using the login URL provided or through the Dayforce mobile application.

Write down your login credentials in this chart so that you can log back in again if you need to.

URL:	
Company:	imagine
User Name:	
Password:	

Note: When you open Dayforce WFM for the first time, you may see a message prompting you to install Microsoft Silverlight—a free application required to run Dayforce WFM.

Manager Features



Dayforce HCM features that are commonly used by Managers include:

- **Organization Picker** – Used to select which location you are working with.
- **My Day** – Used to approve employee requests and timesheets.
- **My Schedules** – Used to schedule employees for work.
- **My Timesheets** – Used to record employee punch data and time worked.

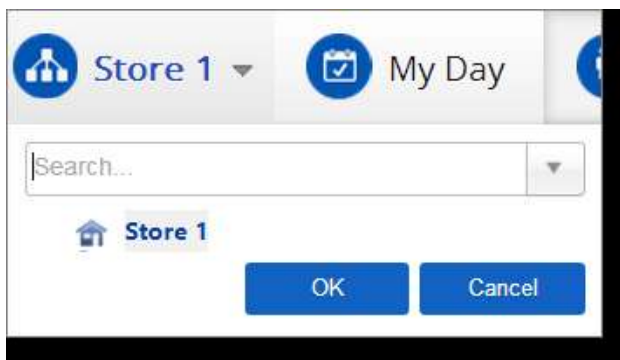
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- **My HR** – Used to view and edit employee records.
- **My Work** – Where the manager views their own schedule and submits requests for approval.
- **Me** – Where the manager views and edits their own HR record.
- **My Benefits** – Where the manager can enroll in and view their own benefits information.

Employees have access to the highlighted features on the above list. Managers still need to review their own personal information so they will also have access to these features. The manager access allows managers to oversee a group of employees in addition to the employee features.

Organization Picker

The Organization Picker appears at the top left-hand corner on the **Navigation Bar**. Use it to select a location to view within the selected feature.



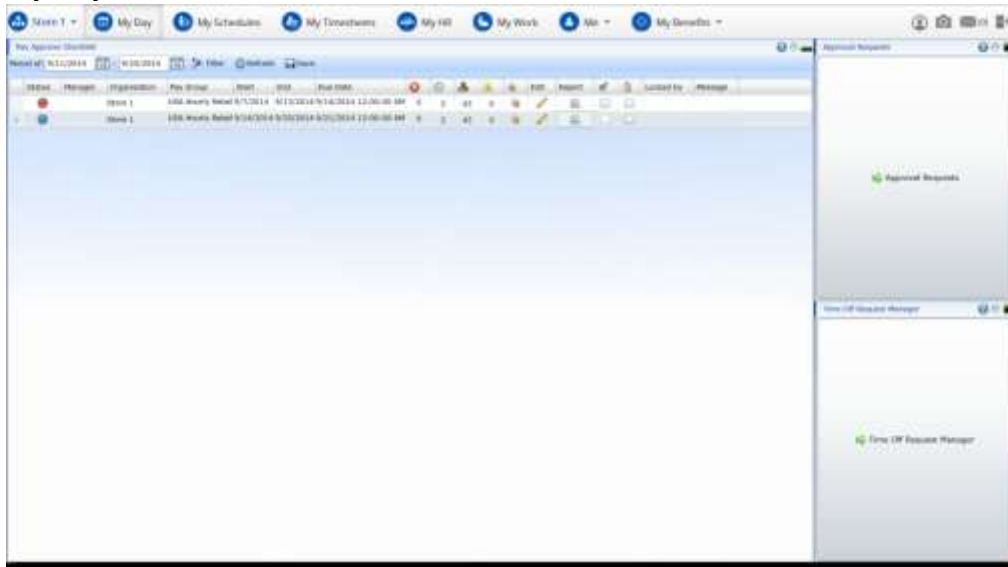
At Imagine!, if a manager supervises only one location, it will be selected by default.

If a manager has access to multiple locations, select the desired location on the Organization Picker and click OK.

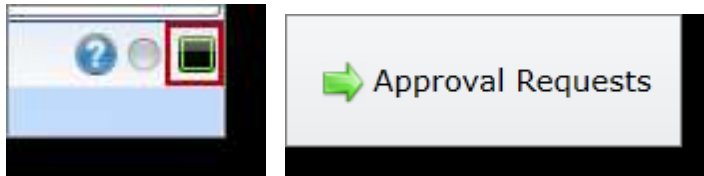


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My Day



When My Day is opened the active panel is maximized and is the largest section of the workspace. Additional panes appear on the right-hand side of the **My Day** screen. Instead of using a drop-down list on the Navigation Bar, managers access features within **My Day** by maximizing these panes.




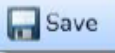
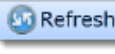
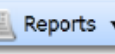
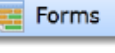


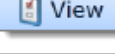
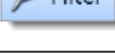

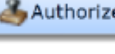
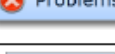
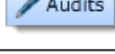
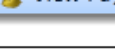

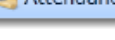
Panes are maximized by:

- Selecting the green and black square in the corner of the pane.
- Clicking the label with the green arrow in the middle of the pane.

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Tool Bar Buttons

The following buttons appear on the Tool Bar when navigating Dayforce as a manager:

Icon	Description	Definition
 Load	Folder	Load information on the page.
 Save	Floppy disc	Save the schedule in draft form.
 Refresh	Circular arrows	Refresh the current page to display the most recent changes.
 Reports ▾	Paper booklet	Run a report on one or more aspects of the feature.
 Forms ▾	Highlighted form	Submit HR Record changes.
 Undo Redo	Left and right downward arrows	Undo an action you just performed, or redo an action that you just deleted.
 New	Green plus	Add a new item to the workspace.
 View	Clipboard	Modify the way information is displayed.
 Filter	Funnel	Access the Search Pane and narrow down the information displayed on the page.
 Sort	Vertical arrows	Change the order in which information appears on the page.
 Authorize	Stamp	Authorize completed timesheet entries.
 Problems	Error	Display any problems on the timesheet.
 Audits	Pen	Show any changes made to the timesheet.
 View Pay	Money bag	Display a summary of employee pay according to the timesheet entries.
 Balances	Scale	Display amount of time away remaining.
 Attendance	Clock and scroll	View employee attendance history.

HR Records

An employee's HR Record forms the basis of all activity in Dayforce. The information found on an HR record dictates important functionality such as:

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- How an employee is scheduled
- Which punch policy is applied to an employee's timesheet
- How an employee is paid
- What kinds of time away requests an employee can make
- What kinds of benefits an employee can enroll in

At Imagine!, Managers can view employee records but are only able to edit a limited amount of the information on them. Other users within the organization (such as Payroll Administrators or Human Resources Administrators) may have a different level of access to employee records.

Load an HR Record

Path: **My HR**

When employees log into Dayforce they only view their own records and requests. However, when a manager or administrator logs into Dayforce they might have access to information for hundreds of employees. Consequently, being able to quickly locate the correct employee records in My HR is important.

Click the Filter button to open the **Search panel**. This panel is used to search for employee records.



Information pertaining to the group of employees you are looking up can be entered. Some information is entered by typing into a criterion box, and other information is selected from a list when you want to add it to the filter. Once the search criteria are set, click the **Apply Filter** button on the right-hand side of the search panel.



A	C	E	H	J	P	R
Abby Anderson	Cathy Jenner	Eric Ellis	Henry Leonardo	Jerry Yaddin	Pamela Manzini	Randy Reynolds
B	D	F	I	L	Q	S
Bonita Icenour	Darla Ramirez	Frank Sykes	Ida Barnes	Lola Hughes	Quinn Kayman	Serena Thompkins
	Don Gibbons					

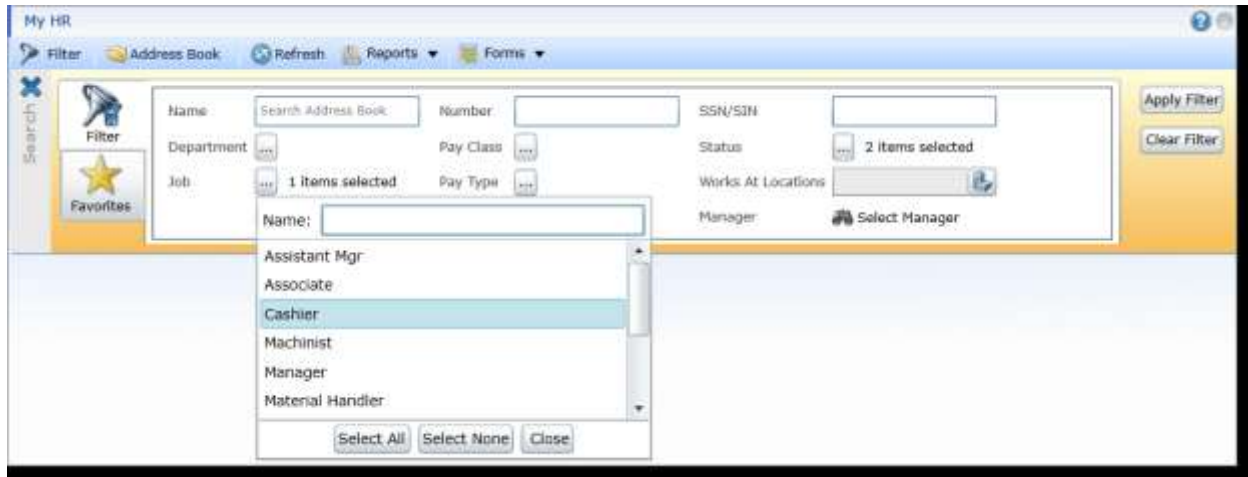
The Address Book appears and lists the names of all employees that meet the filter criteria. Select the correct employee from the list to open an HR record, Click **Filter** to return to the search panel. Narrow the results by adding additional criteria to the search, or begin an entirely new search by clicking **Clear Filter**.

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Filter Favorites

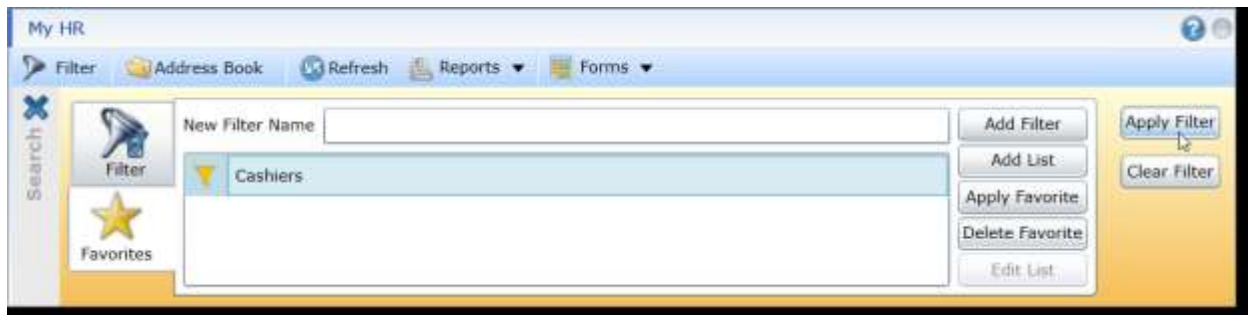
If you use certain filters frequently, add them to your Favorites list so that you can use them again without re-selecting the criteria every time.

To set up a Filter Favorite, begin by specifying Filter parameters in the Search panel.



Do not select Apply Filter yet. Instead, select the **Favorites tab** on the left-hand side of the panel.

Type the name of your Favorite in the **New Filter Name** box, and then click **Add Filter**.



The filter appears on the list. Filter Favorites are identified by the yellow funnel icon.

To use the filter, select it from the favorites list and click **Apply Filter**.

View HR Records

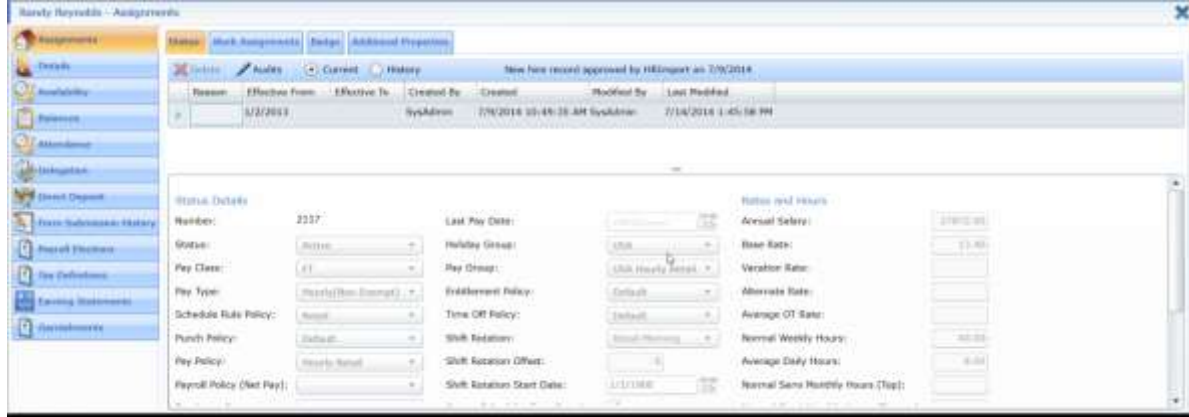
Path: **My HR > [Load Employee Record]**

Managers view employee HR Records to check information related to policies, work assignments, and personal details. The information available and the ability to make changes to it depends on the organization's configuration and security settings.

From the Search Panel in My HR, select an employee name from the address book to open the HR Record.

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Assignments



By default, the **Status** tab of the **Assignments** section displays upon loading the HR Record. This displays details about the employee's employment and the policies the employee is assigned to including:

- **Pay Type** – Dictates whether the employee is paid hourly or by salary.
- **Schedule Rule Policy** – Restricts how and when shifts can be added to the schedule for the employee.
- **Punch Policy** – Sets rules for how and when employees can punch in and out for work.
- **Entitlement Policy** – Controls how much time away an employee gets, and what kinds of time away they are entitled to.

In addition, an employee's wage or salary and weekly hours are also recorded here.

Work Assignments

Path: **My HR > Assignments > Work Assignments**

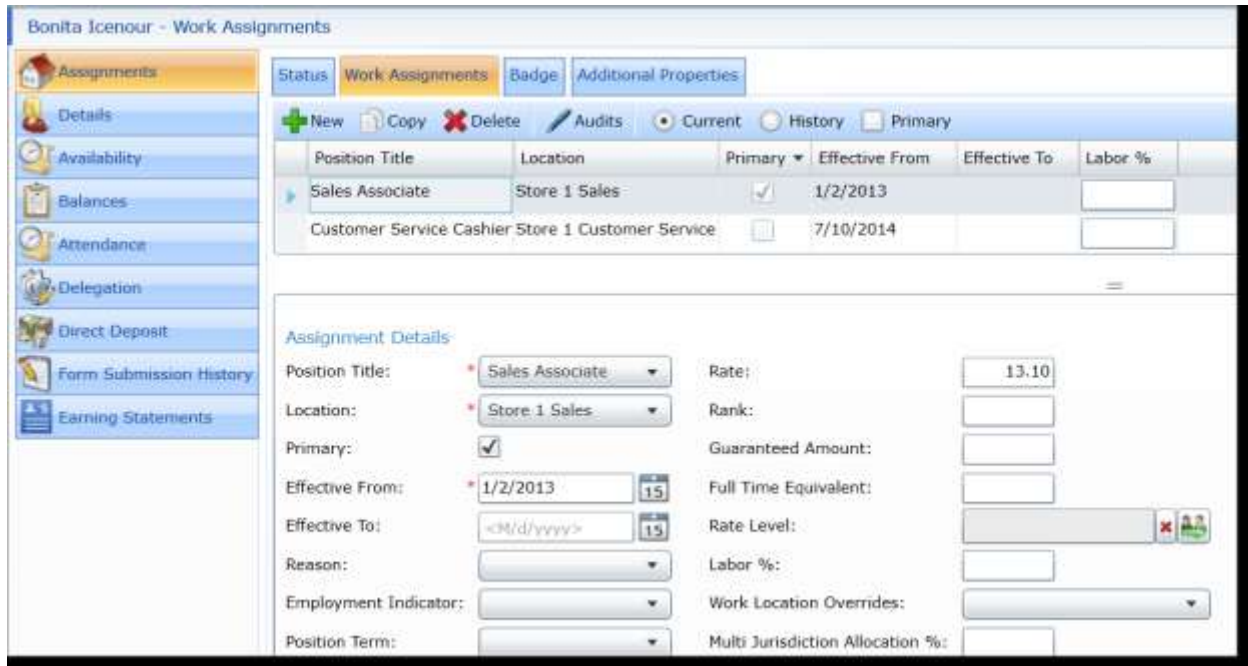
Work Assignments define where an employee is scheduled to work (location) and what they will be doing there (position).



The Work Assignment that an employee works at every day is their **primary** work assignment. Additional assignments are added to the HR Record if they can work in more than one position or location.

Load an employee HR Record and click on **Assignments**. Select the **Work Assignments** tab.

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Managers view the Work Assignments tab to check the following information:

- Whether an employee has been authorized to work in additional positions
- Whether an employee has been authorized to work in multiple locations
- If an employee has changed roles and the manager needs to check when the changes take effect

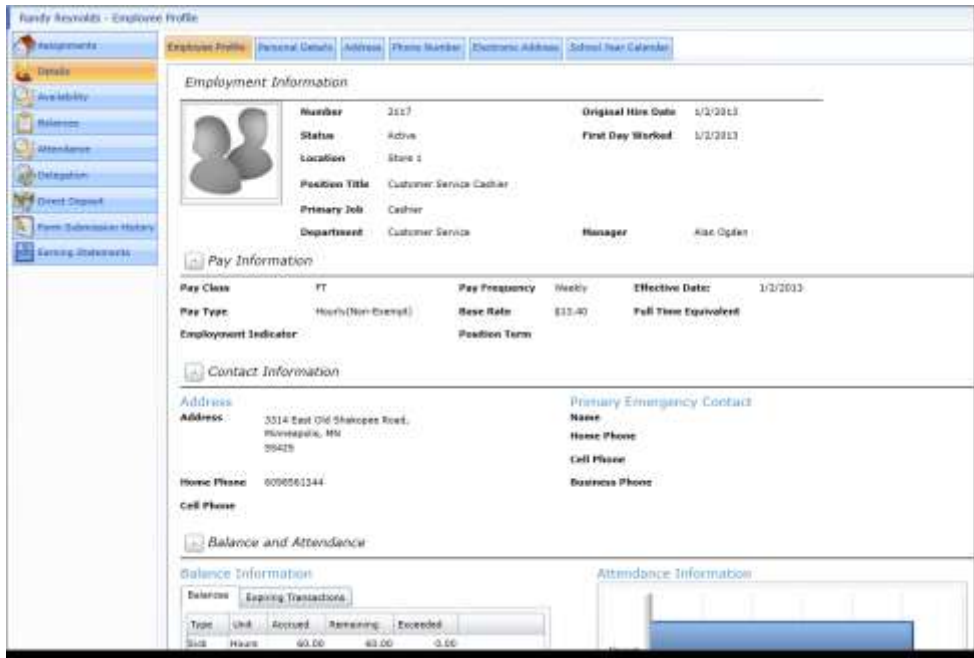
The work assignments are listed in the top pane of the workspace. When a work assignment is selected, assignment details appear below in the bottom pane. The **Primary** check box indicates a primary work assignment, and the primary assignment appears at the top of the list.

Work assignment changes are **effective dated**. This means that a work assignment may be effective as of the current date, a past date, or an upcoming date. For example, an employee received a promotion and begins their new role in two weeks. The new work assignment is added today, with the **Effective From** date being the date on which they start the new assignment. The employee cannot be assigned to the new position until the **Effective From** date. If the old assignment is no longer relevant, the **Effective To** field is also updated to end the assignment for the employee. After the **Effective To** date the employee will no longer be eligible to work in the old assignment.

Details

Click **Details**, by default the **Employee Profile** tab is displayed.

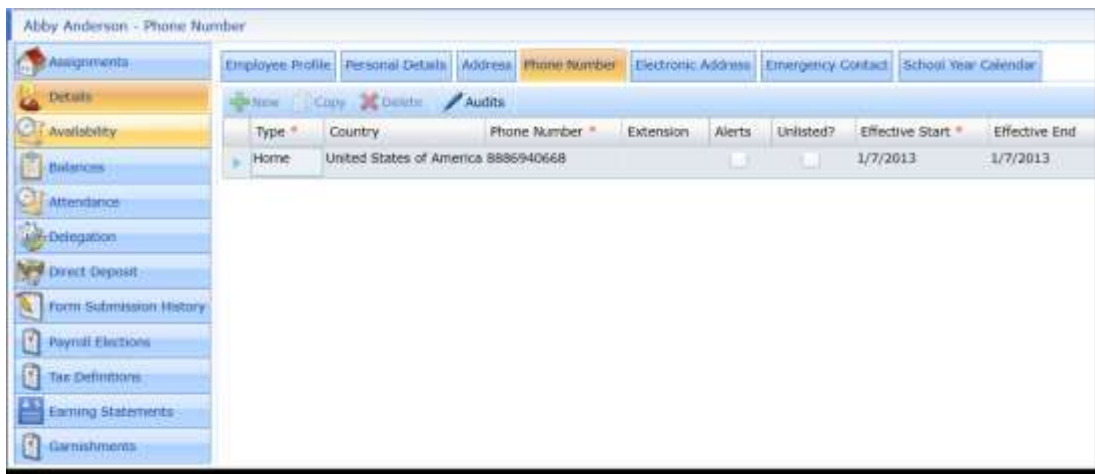
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The profile displays basic personal details for an employee. There are four main sections on this page:

- **Employment Information** – Lists employee’s position, status, and manager.
- **Pay Information** – Lists employee pay class, frequency, and rate.
- **Contract Information** – Shows employee’s address and contact information.
- **Balance and Attendance** – Displays vacation balances and attendance information.

Additional tabs appear across the top of the Details workspace.

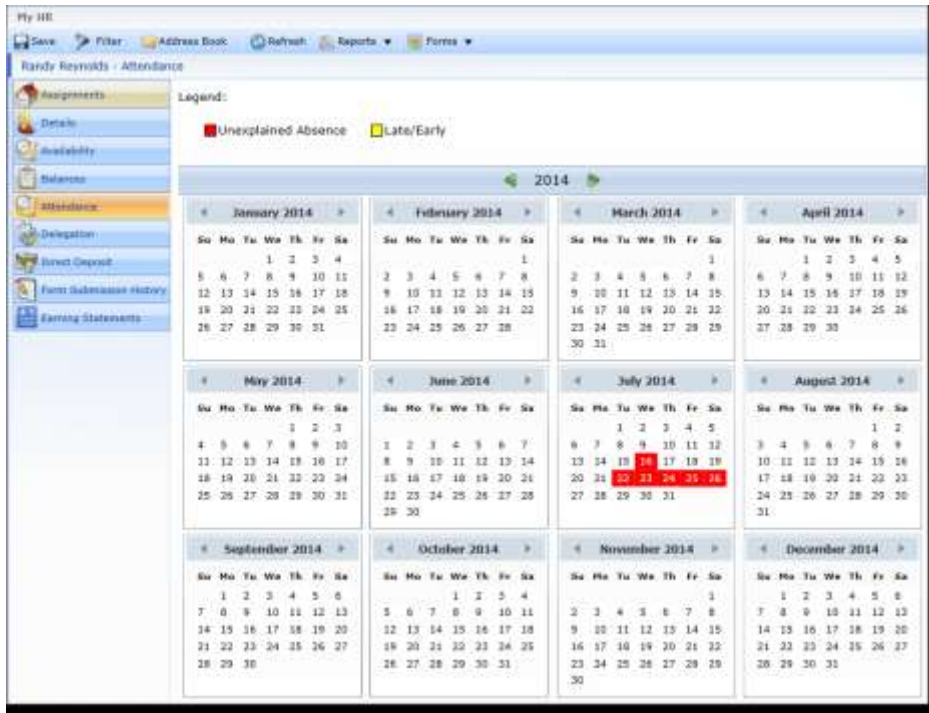


Managers can view basic employee information, such as a phone number or email address, using these tabs. Depending on your configuration these details can be updated directly in the HR record or by using forms.

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Attendance

The **Attendance** feature displays information about the employee's attendance record in calendar format.



Calendar dates are highlighted to indicate an unexplained absence or other attendance information.

HR Reports

Path: **My HR > Reports**

There are several reports that you can run from My HR. Some of the most commonly used reports include:

Name	Description
Employee Detail Report	Returns an organized list of employees and their pertinent details.
Employee Balance Report	Returns a summary of employee balances, such as the number of sick and vacation days.

To run a report, click **Reports** and select the desired report.

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Request Management

There are several types of requests that come through to managers for approval. Some of these include requests for time away, availability changes, or shift trades. Requests are managed in in the **My Day** feature.

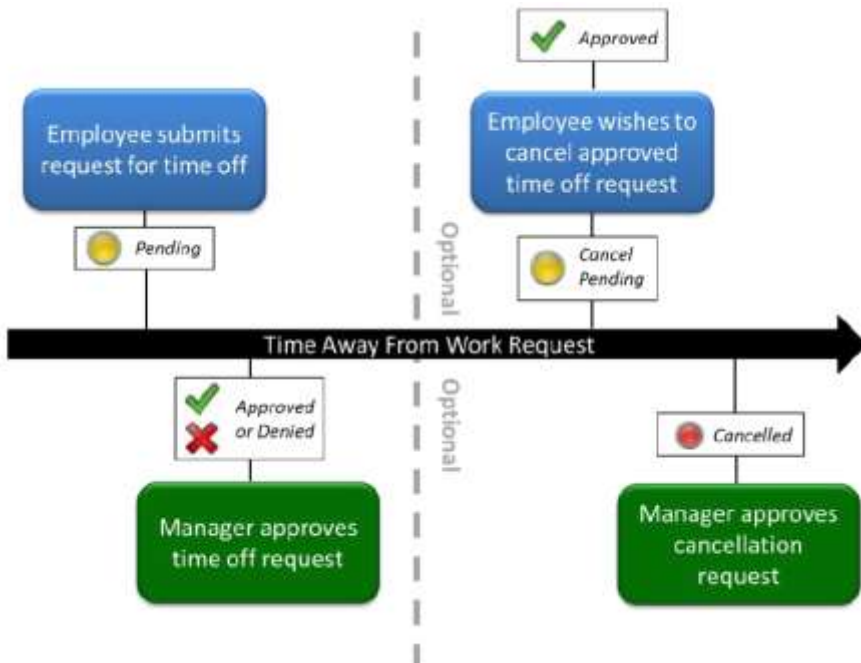


A variety of other features are available in My Day. This topic discusses the **Time Off Request Manager**. This is used for resolving employee time away requests, accessing the coverage tool, creating new requests, and related reporting.

Since Pay Approval is the final manager task, we'll review the **Pay Approve Checklist** as part of Timesheet Management.

The Time Away Request Management Process

Employees can submit requests for time away, such as vacation, personal, or sick time, in the My Time Away feature of Dayforce HCM. These requests are sent to the manager for approval.



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This diagram shows the Time Away Request process. The top section shows employee inputs and the bottom section shows manager inputs. Employees initiate a time away request or cancellation request, but the request remains in a pending state until a manager is able to approve or deny it.

Managers use the **Time Off Request Manager** to view and approve time away from work requests. To access this feature, navigate to **My Day** from the right-hand pane.

Review Time Away Requests

Path: **My Day > Time Off Request Manager**

Incoming employee requests for time away appear in a list. Click **Refresh** to ensure that recent employee requests are listed.



The current status dictates which actions are available to both the manager and employee. The following **Status** icons appear on the Time Off Request Manager page:

Icon	Status	Description
	Pending	Request has been submitted and is awaiting manager approval.
	Approved	The manager has approved the request.
	Denied	The manager has denied the request.
	Cancel Pending	The employee has requested to cancel time away that has already been approved. The cancellation request is awaiting manager approval.
	Cancelled	The approved time away has been cancelled.

To narrow the results or search for specific requests, click **Load**.



Select from a variety of filter criteria, including request status, and click **Search**.

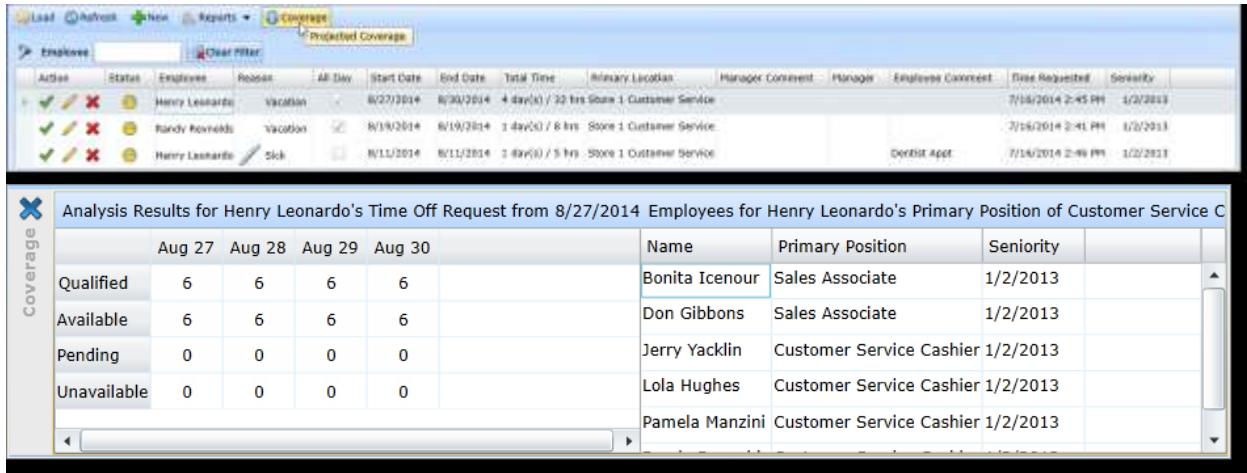
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The Coverage Tool

Path: **My Day > Time Off Request Manager > Coverage**

The **Coverage** tool allows managers to identify other employees who are available during an employee's requested absence. This information helps ensure that your location is adequately staffed at all times and you aren't approving too many requests for the same time period.

To view the Coverage panel, select an employee from the list and click **Coverage**.



The panel shows the following information related to the request:

- A list of employees who are qualified to work the same position as the employee making their request
- The number of employees available to work during the requested time
- The number of employees who have submitted requests for the same time
- The number of employees who have been approved for time away for the same requested time

Approve, Edit, or Deny Requests

To make a decision regarding a request, managers choose one of the three options in the **Action** column for the request:

Icon	Name	Definition
	Approve	The request is approved and added to the employee's schedule.
	Edit	Manager can modify the original time away request.
	Deny	The request is rejected and is not be added to the employee's schedule.

Approve Requests

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Any approved time off is displayed in your location's schedule and timesheet. The request updates to indicate the change in status.

Action	Status	Employee	Reason	All Day	Start Date	End Date
		Patty Peterson	Sick	<input checked="" type="checkbox"/>	2/12/2014	2/12/2014

The employee views the updated status in the **My Time Away** panel. Depending on configuration a notification message may be sent to the employee indicating the decision of the request.

Edit Requests

If Edit is selected, the **Edit Request window** is displayed.

Type	Unit	Start	End	Account	Used	Approved	Pending	Remaining	Exceeded
Sick	Hours	01/01/2014		60.00	0.00	0.00	0.00	60.00	0.00
Vacation Days		01/01/2014		15.00	0.00	-0.00	-1.00	14.00	0.00

This window is very similar to the submission window that employees use to create a request. Managers may:

- Modify the request Reason
- Change the length of time away
- Add a Manager Comment
- View the employee's balances

Once changes have been made to the request, one of three options is selected for submission:



Managers may **Approve** or **Deny** the modified request. The **Save** button saves any changes to a time away request while leaving the request in **Pending** status.

Deny Requests

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When requests are denied, the status of the request is updated. The employee views the updated status of the request in the **My Time Away** panel. Depending on configuration a notification message may be sent to the employee indicating the decision of the request.

To add a comment on the request and provide details about why a request was denied, use the Edit action. Insert the comment and then deny the request from the Edit Request window.

Create an Employee Request

Path: **My Day > Time Off Request Manager > New**

Managers can create time away from work requests on behalf of employees. Click **New** to open the **Create Request** window.

The screenshot shows the 'Create Request' window with the following details:

- Time Off Details:**
 - Employee: Select an employee (with an employee icon)
 - Reason: [Dropdown arrow]
 - Status: Pending (with a yellow circle icon)
 - All Day:
 - Start: <MM/yyyy> (with a calendar icon)
 - End: <MM/yyyy> (with a calendar icon)
 - Total Hours: 0.00
- Employee Comment: [Text area]
- Manager Comment: [Text area]

First, select the employee for whom the request is created. Click the **Employee** icon and select the name of the desired employee from the list.

Set the time away request criteria by selecting a reason for the request, a date/time for the request and any applicable comments.

The screenshot shows the 'Create Request' window with the following details:

- Time Off Details:**
 - Employee: Cathy Jensen (with an employee icon)
 - Reason: Holiday (with a dropdown arrow)
 - Status: Pending (with a yellow circle icon)
 - All Day:
 - Start: 7/31/2014 (with a calendar icon)
 - End: 7/31/2014 (with a calendar icon)
 - Total Hours: 8.00
- Employee Comment: [Text area]
- Manager Comment: [Text area]
- Balances:**
 - Table with columns: Type, Unit, Start, End, Accrued, Used, Approved, Pending, Remaining, Exceeded
 - Row 1: Sick, Hours, 01/01/2014, [blank], 60.00, 0.00, 0.00, 0.00, 60.00, 0.00
 - Row 2: Vacation Days, 01/01/2014, [blank], 15.00, 0.00, 0.00, 0.00, 15.00, 0.00

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Once this information is entered, the employee's balances appear in the window.



To complete the request, select one of the two options for submission:

- The **Approve** button submits and approves the time away request in one step.
- The **Save** button saves the request and changes it to a Pending status.

Cancellation Requests

Employees may cancel a time away request that has already been approved.

The cancellation is initiated by the employee from their **My Time Away** screen. A request to cancel the time away is then sent to the manager for approval.



The request status appears as **Cancellation Pending**.

To cancel the time away request, select **Approve** when the request is in a Cancellation Pending status.

If **Deny** is selected for the cancellation request, the time away request remains approved on the employee schedule.

Time Away From Work Reports

Path: **My Day > Time Off Request Manager > Reports**

The Time Off Request Manager feature has two reports available:

Name	Description
Employee TAFW Report	Summarizes each time away request by status. Used to keep records about which requests have been submitted, what their statuses are, and who submitted them.
TAFW Calendar Report	Displays days off taken by employees during the current month.