Up and Running with Dayforce HCM 8.50

a Dayforce HCM *MyPath* guide

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Manager Training.

To begin the training:

1. From the Table of Contents on the left, expand the section: Manager Training
2. Select the first item.

Prerequisite:

- Employee Training

This course will take approximately 3 hours and 45 minutes to complete.

- A day in the life of an manager- 25 Minutes
- Scheduling your staff - 90 Minutes
- Tracking time and attendance - 30 Minutes
- Managing Employees - 60 Minutes
- Your account - 20 Minutes

To continue:

1. From the Table of Contents, select the first section: **A day in the life of a manager**

Please refer to: http://mypathprod.dayforce.com/getting-started-for-managers

Procedure

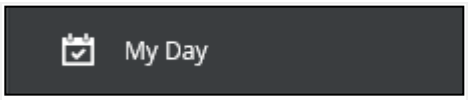
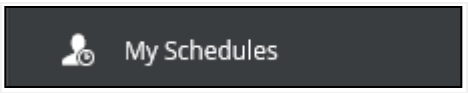
Scenario
Beginning with a day in the life of a manager, let's log in to Dayforce for the first time, explore the Navigation Panel and some of the basic features.

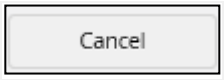
Step	Action
1.	Getting in You might get logged in automatically Some organizations will log you in automatically. This will happen if your organization uses "Single Sign On". Most people will log in using a username and password. Logging in In this example, you'll log in. There are 3 fields to complete: Company, User Name, and Password.
2.	Resetting your password If you forget your password, you can reset it by clicking the Forgot Password? link beneath the Login button. The application prompts you to enter your user name or E-mail address. Click Submit. The application sends you an e-mail with a URL. Click the link inside the e-mail and you will be prompted to reset your password.

Step	Action
3.	Log in to Dayforce HCM In this example, the Company name is XYZ. Click in the Company field.
4.	Enter the desired information into the Company field. Enter "xyz".

Step	Action
5.	Click in the User Name field.
6.	Enter the desired information into the User Name field. Enter "andy.cooper".
7.	Click in the Password field.
8.	Enter the desired information into the Password field. Enter "123Alpha".
9.	Click the Login button.
10.	Introducing Dayforce HCM Dayforce is primarily used to manage time, attendance, schedules, benefits, and pay. Your access to different areas of Dayforce will vary depending on your organization. When you log in, you'll start from the Home screen. It contains several sections such as your Messages, and access to your Profile. The blue panel at the top of the screen is where you can add up to 6 features you use often as a favourite. The My Team panel shows all employees that report to you.
11.	My Team The My Team panel allows you to view employee information directly from the Home screen. Let's view Alfonso Boyd's profile. Click the Alfonso Boyd button.
12.	Alfonso Boyd's Profile Alfonso's profile is displayed without leaving the home screen. For example, if you need Alfonso to work a last minute shift, you can get his phone number here, without having to access My HR. If more information is needed, you can access his HR Profile from here too, as well as view Alfonso in your team's hierarchy.

Step	Action
13.	Click the Close button.
14.	Other options In the top right corner of the home screen you have four options available to you. Let's review the Global Search feature first. You can use this to search for features available to you such as My HR, or an employee in your team. Click the Global Search button.
15.	Global Search pane The Global Search pane makes it easier to access employee records or different features directly from the Home screen.
16.	Help icon The help icon allows you to access standard Dayforce help documentation, or MyPath content if your organization has subscribed to it.
17.	Message Center You can access your Message Center from here. In the Message Center you can send and receive messages, as well as view any pending approvals needing your attention.
18.	Profile icon You can access your profile and log out of Dayforce by clicking the profile icon. Click the Profile button.
19.	Profile icon If you have more than one role available, you can switch between them here. Let’s explore Dayforce a bit more.
20.	Let's take a look at the navigation panel Click the Menu button.

Step	Action
21.	Overview of Dayforce Interface - Navigation Panel On the left is the navigation panel where you'll access additional screens. The screens available to you may vary depending on your role and organization. If you manage different locations, you can use the org picker to change to another location. Every company uses different screens but in this lesson we'll review 4 of the most common ones. In the following lessons, you'll learn to use these screens in more detail as you apply them to real-world scenarios. Let's pin the navigation panel for this lesson. Click the Pin button.
22.	Navigate to the My Day screen Click the My Day button. 
23.	My Day This is the My Day screen. It contains different panels depending on your role and organization. For example, you may be able to manage time off requests here. You can move between panels by clicking the black square in the top right of the panel you want to view. Click the Time Off Request Manager button.
24.	You are now working with the Time Off Request Manager You'll use this screen to manage time off requests from your employees.
25.	Navigate to My Schedules If you manage schedules for your employees, you'll do so from My Schedules. Let's take a closer look at this screen. Click the My Schedules button. 

Step	Action
26.	My Schedules The My Schedules screen appears. You'll use this screen to schedule shifts for your employees. If you manage multiple locations, you can access their schedule using the org picker.
27.	Click the Org Picker button.
28.	Org Picker We are currently viewing the schedule for Plant 1 as we have that selected in the org picker, but could switch to Plant 3 if we need to work with employee schedules there.
29.	Click the Cancel button. 
30.	My Timesheets If you review timesheets, you'll have access to the My Timesheets screen. Click the My Timesheets button.
31.	My Timesheets This is the My Timesheets screen. It is similar to My Schedules but also displays an employee's actual time worked if they enter their hours in Dayforce.
32.	Navigate to My HR Next, let's take a look at My HR where you can access your employee's HR records. Click the My HR button.
33.	Click the Alfonso Boyd link.

Step	Action
34.	My HR information My HR lets you review your employee's status information and defining details such as pay information, shift rotations, and rates. Depending on your company setup, you may be able to update this information as well.
35.	This concludes the Manager overview We've successfully covered basic Dayforce navigation and reviewed some of the key screens you'll be using in the system. In the following lessons, you'll learn to use these panels and screens in more detail as you apply them to real-world scenarios.
36.	End of Procedure.

Scheduling a shift.

In this lesson you're going to walk through what could be a typical day for a manager. We'll begin by looking at how you can schedule a shift using Dayforce HCM.

After completing this lesson, you'll be able to:

- Load your schedule
- Add a shift to your schedule in the grid view

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Aaron Lee
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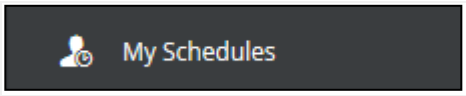
Procedure

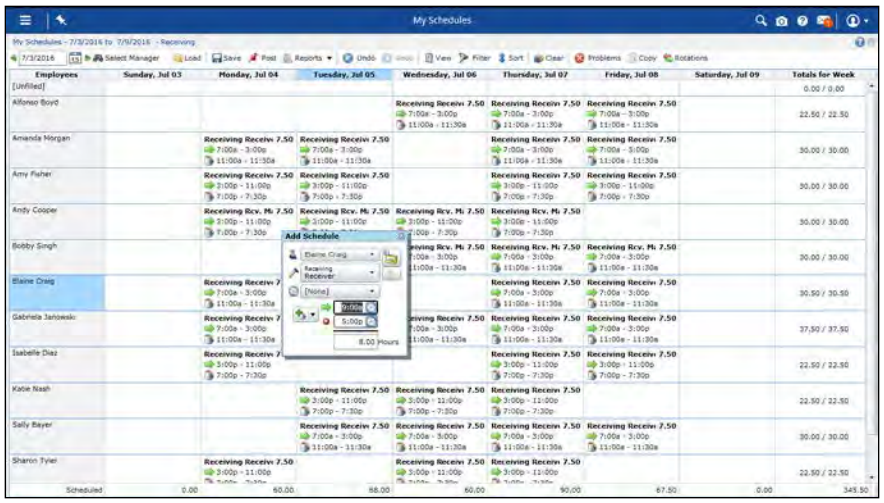
Scenario
This scenario is presented using the fictitious XYZ company.

As we continue in the day of the life of a manager, your location will be short staffed next Tuesday. Add an extra shift to keep your employees happy.

Step	Action
1.	Building a schedule? You'll schedule your employees using Dayforce HCM. You can perform scheduling tasks, including adding and deleting shifts, with just a few clicks of your mouse. Dayforce also alerts you if your schedule has problems as you're building it so there's no need to double and triple check for mistakes.

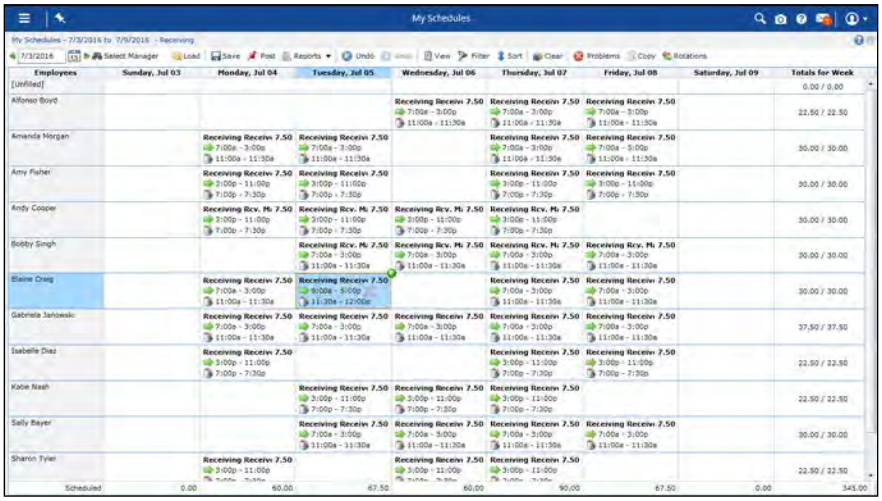
Step	Action
2.	Load the schedule Start by navigating to the schedule which already has a rotation loaded. Click the Menu button.
3.	Click the My Schedules button. 

Step	Action
4.	Which week loads by default? Because you'll usually add and edit shifts for upcoming weeks, My Schedules loads next week's schedule by default for the location you manage.
5.	Schedule Elaine Craig for a shift on Tuesday from 9AM to 5PM In this example, we're going to add a shift for Elaine Craig on Tuesday from 9AM to 5PM. Click the Tuesday cell.
6.	Click the Add Shift button.



Step	Action
7.	Save the shift You can view and edit the details of the shift in the Add Schedule window. This includes the position, start time, and end time. You'll save the shift to the schedule by clicking the Close button. In this example you're adding a Receiver shift from 9AM to 5PM. Click the Close button.

Step	Action
8.	You've successfully scheduled a shift! Elaine Craig is now scheduled to work on Tuesday between 9AM and 5PM as a Receiver.
9.	Can your employees see this new shift? That depends on whether or not the schedule has been posted. Clicking the Post button posts the schedule making it visible to employees when log in. Schedules can only be posted once. After it has been posted for the first time any changes you make are visible as soon as you save them.

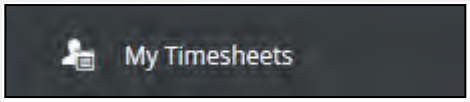
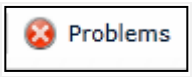


Step	Action
10.	Save your changes Click the Save button.
11.	End of Procedure.

Please refer to: https://mypathprod.dayforce.com/resolving-timesheet-problems

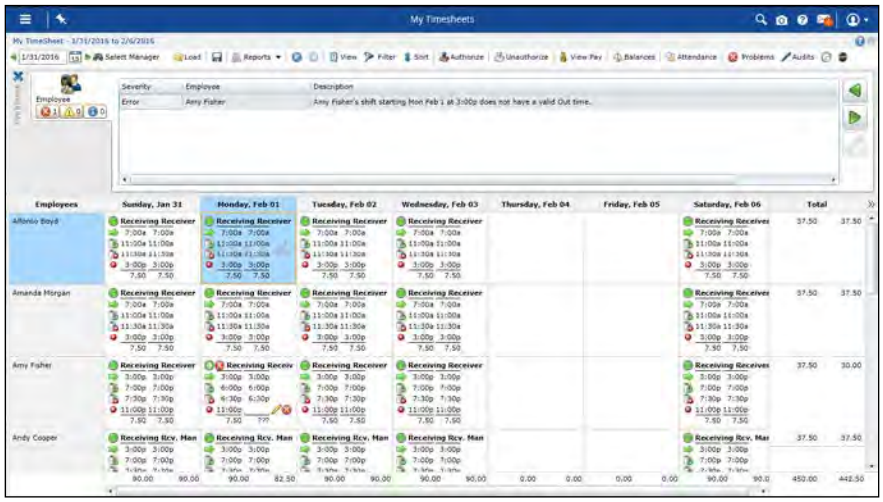
Procedure

Scenario
Your employee Alfonso Boyd clocked in late because he was running an errand for you. Check the timesheet for problems and fix Alfonso's late punch.

Step	Action
1.	First, open My Timesheets One of your frequent tasks in Dayforce will be to check timesheets for problems. Click the Menu button.
2.	Click the My Timesheets button. 
3.	Display the Problems panel It is important to correct timesheet problems as they could affect the way your employee's are paid. Let's display the problems panel to check for timesheet errors. Click the Problems button. 

Step	Action
4.	Reviewing the timesheet using the Problems Panel In Dayforce you only need to be concerned with clock punches that don't line up with the schedule. If an employee was scheduled for 7AM to 3PM and they clock in for 7AM out at 3PM there's no need to review that entry. All you care about are employees that were late, early, or maybe forgot to punch. And you can see those problems from the Problems panel. In this example you have two problems: Alfonso punched in 15 minutes late and Amy is missing an out punch.
5.	Correct Alfonso's start punch to 7AM In this example, you worked with Alfonso yesterday and know that he was late to punch in because he was running an errand for you. Edit Alfonso's problem punch on the timesheet in order to make sure he's paid correctly. Click the Shift.
6.	Click the Edit button.
7.	Change the punch Alfonso has several clock punches but we're interested in his first punch at 7:15AM. Update the punch to 7AM. Click the Decrement button.
8.	Click the Decrement button.
9.	You've successfully resolved the problem! Now that the clock is set to 7AM the problem automatically disappears from the Problems panel.

Step	Action
10.	Close the edit shift dialog and save your changes Click the Close button.



Step	Action
11.	Save your changes Click the Save button.
12.	End of Procedure.

Sending a message.

The Message center works like e-mail between Dayforce users. Think of it like Facebook messages. You can view messages, notifications, and responses on time off and other requests.

After completing this lesson, you'll be able to:

- View the message center
- Send a message

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Aaron Lee
eLearning Developer
Toronto, Ontario
aaron.lee@ceridian.com

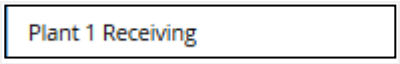
Procedure

Scenario

This scenario is presented using the fictitious XYZ company.

Nearing the end of a day in the life of a manager, you're trying to plan for the remainder of the year.

In order to guarantee proper coverage at Plant 1, you'll request that all receiving employees submit their time off requests ahead of time.

Step	Action
1.	Create a new message This message will be sent to all Receiving employees asking them to submit their time off requests. Click the Message Center button.
2.	Click the Compose button.
3.	Click the New Message menu.
4.	Select the employees at Plant 1 as the recipients Click the To button.
5.	Filtering Use filters to control which employees are displayed in the list. Once your filters are set you can select and add everyone who this message should be sent to.
6.	Set a filter to display only Plant 1 employees Instead of searching and selecting your recipients individually, you can filter the list to your desired employees then select them in one step. Click the Location menu.
7.	Select Plant 1 Receiving Click the Plant 1 Receiving list item. 

Step	Action
8.	Your filter has been applied Now you can move them into the selected list. Click the All button.
9.	Click the Select button.
10.	Type the message subject Click in the Subject field.
11.	Enter the desired information into the Subject field. Enter "Time Away From Work Requests".
12.	Click in the Body field.
13.	Enter the desired information into the Body field. Enter "Please submit your time away from work requests by the end of the month".
14.	Click the Send button.
15.	Click the Close button.
16.	End of Procedure.

Responding to a time off request.

When your employees request time away off it will be sent to you for review and approval. If the request looks good you can go ahead and approve it. Otherwise, you can edit the request and return it to the employee for review or simply decline it.

After completing this lesson, you'll be able to:

- Approve time off for employees

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Aaron Lee
eLearning Developer
Toronto, Ontario
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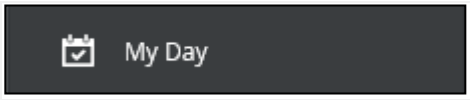
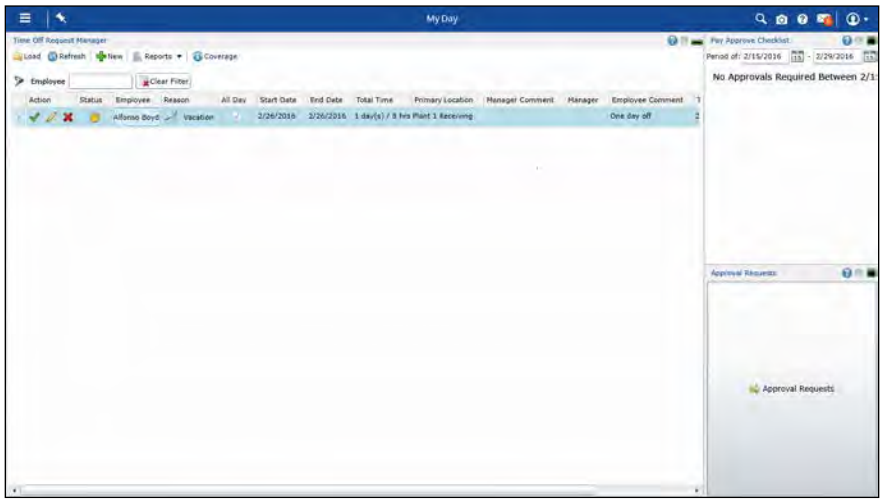
Procedure

Scenario
This scenario is presented using the fictitious XYZ company.

In our final lesson of a day in the life of a manager, your employee, Alfonso Boyd, spoke to you yesterday about taking a day off. Display the Time Off Request Panel to see if he's entered his request into Dayforce. If so, submit your approval.

Step	Action
1.	First, open the Time Off Request Manager panel This is where you'll review and approve your employee's time off requests. It's located in the My Day screen. Click the Menu button.

Step	Action
2.	Click the My Day button. 
3.	Expand the Time Off Request Manager Click the Expand button.
4.	The Time Off Request Manager expands This is where you'll find all pending time off requests submitted by your employees. You can use the Load button at the top of the screen to control which requests are displayed, including requests you've already approved or denied.
5.	Verify that other employees are qualified and available to work Alfonso's position You can use the Coverage panel to make sure other employees can fill in for an absent employee to ensure there isn't a labor shortage. Click in the Alfonso Boyd field.
6.	Click the Coverage button.
7.	The Coverage panel The Coverage panel displays a list of employees who are qualified and available to work the same position as the employee making the request.
8.	The Coverage Panel The panel also displays the following information for the days the employee requested: - How many employees are Available to work during the requested time - How many employees have submitted requests for the same requested time (Pending) - How many employees have been approved for time away from work for the same requested time (Unavailable)
9.	Click the Close button.



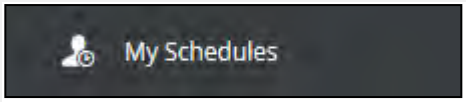
Step	Action
10.	Approve the request Now that you've confirmed other employee's can cover Alfonso's shift you can go ahead and approve his request. If you needed to edit this request before approving it you would click the Pencil button and if you needed to reject the request you would click the Red X button. Click the Approve button.
11.	You've successfully approved Alfonso's time off request! His one day of vacation is now approved in Dayforce HCM. He's now marked as unavailable to be scheduled on this day and he'll be compensated appropriately during his absence.
12.	End of Procedure.

Please refer to: http://mypathprod.dayforce.com/introducing-the-schdule

Procedure

Scenario
This lesson introduces you to scheduling in Dayforce.

It discusses how My Schedules works and calls out important pieces of information you'll see on the schedule each week.

Step	Action
1.	Start by opening My Schedules This is where you'll schedule your employees. Click the Menu button.
2.	Click the My Schedules button. 
3.	My Schedules This is where you'll build schedules in Dayforce. My Schedules replaces your current scheduling process which might involve drafting schedules on paper, in Excel, or in another application.
4.	My Schedules layout When you open My Schedules you'll be shown the upcoming week's schedule. Your employees are listed along the left side of the screen and the days of the week are along the top. Each cell in this grid represents an employee's shift on a specific day of the week.
5.	Shift information Each cell contains important pieces of information about an employee's shift. First, there's the Work Assignment. This is the job the employee will be performing.

Step	Action
6.	Shift information To the right is the Shift Duration. This is the amount of time the employee is scheduled for that day. It excludes unpaid meals and breaks.
7.	Shift information Below are the Shift Times and Meal Times. This is when the employee is expected to arrive at work, take their meal, and leave.
8.	Totals for the week In the rightmost column we see an employee's total hours scheduled excluding unpaid meals and breaks. The first number is the amount of hours scheduled at this location and the second number is their total hours at all locations.
9.	Building your schedule When you open a schedule for the first time it will most likely be blank. Depending on how your organization uses Dayforce you might manually add shifts for each employee, use shift rotations to add multiple shifts at once, or copy a schedule from a previous week. We'll review how to perform these tasks in the next lesson.
10.	Schedule policy Dayforce knows your company's schedule policy and will automatically identify scheduling problems for you using an icon in the top left corner of the cell. We can see there's a Warning associated with Sharon's shift on Monday. It also highlights when employees are unavailable to work. Notice Amy's cells are purple. This means she has approved time away this week and can't be scheduled.
11.	Schedules and timesheets When you schedule shifts here, they're automatically added to the timesheet as well. When an employee clocks for work their punches are compared against their scheduled shift on My Timesheets. This means when you're authorizing timesheets you only need to be concerned with shifts that don't line up with the schedule. Shifts that were worked according to the schedule won't require any action on your part other than a simple approval. This is going to save you a lot of time and help make sure your employees are paid correctly.
12.	Scheduling in Dayforce Now that you're familiar with scheduling in Dayforce you can review the next item in the MyPath table of contents to start learning how to use all the tools and features on this screen.

Step	Action
13.	End of Procedure.

Building a schedule.

When you're ready to build a schedule for an upcoming week you'll open My Schedules and start adding shifts.

How you add shifts depends on how your organization is using Dayforce. Adding shifts manually and using rotations are the two most common ways to put schedules together. That's what we'll review in this lesson.

After completing this lesson, you'll be able to:

- Add shifts to a schedule
- Load schedule rotations
- Save your work

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***

Narrated by Joel Harris

Senior eLearning Consultant

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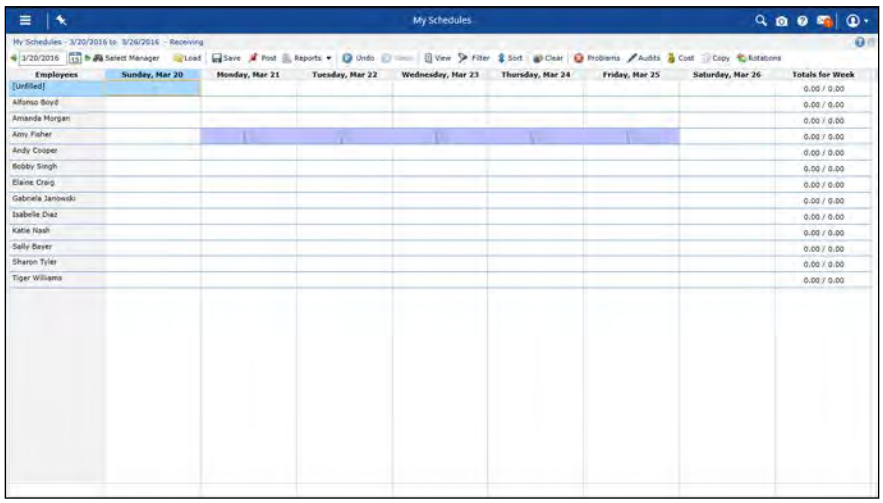
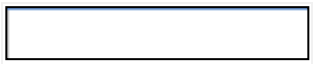
Procedure

Scenario
Learn the basics of creating a schedule in Dayforce.

First manually add some shifts and then load a shift rotation.

Step	Action
1.	Starting to build your schedule When you first open the schedule it will most likely be blank. Depending on how your organization uses Dayforce you might assign shifts to your employees in a few different ways. In this lesson we'll review two of the most common ways shifts are added to the schedule: manually and through rotations.
2.	Manually adding shifts Select an employee and day of the week to manually add a shift. You can edit and confirm the details of a shift before it's saved to the schedule. Add a single shift for Alfonso on Monday and then add shifts for Tuesday through Friday.



Step	Action
3.	Schedule Alfonso on Monday Click the Shift pane. 
4.	Click the Add Shift button.
5.	Edit and confirm the shift Dayforce knows each employee's regular job and shift. This information is entered in the Add Schedule dialog for you. You can change the work assignment and shift times if needed. In this example we'll add a meal to Alfonso's shift before adding it to the schedule.

Step	Action
6.	Add a meal to the shift Click the Add Meal button.
7.	Add the shift After you've confirm the shift's details you can add it to the schedule by clicking the Close button. Click the Close button.
8.	You've successfully added a shift to the schedule Alfonso is now scheduled to work from 9AM to 5PM on Monday with a 30 minute meal beginning at 12:45PM.
9.	Next, add the same shift on Tuesday through Friday You can add multiple instances of the same shift by clicking and dragging the days you want to schedule and then using the Add Shift button. Press the left mouse button and drag the mouse to the desired location.
10.	Click the Add Shift button.
11.	Add a meal to the shifts Click the Add Meal button.
12.	Add the shifts to the schedule Click the Close button.
13.	You've successfully added multiple shifts to the schedule Alfonso is now scheduled to work the same shift Monday through Friday. When you're adding the same shift multiple times it's a lot quicker to select several days at once rather than adding them individually.

Step	Action
14.	Scheduling with rotations Shift rotations quickly add a week's worth of shifts to eligible employees. Rotations contain a pattern of repeating shifts for your employees' regular work week. A rotation might schedule multiple employees for five days from 9AM to 5PM followed by two days off. Add a shift rotation to your schedule.
15.	Schedule your remaining employees using a rotation In this example most of your employees belong to a shift rotation. Click the Rotations button.
16.	Load a rotation onto the schedule Without applying a filter, the Load Rotations button will load rotations for all employees on your schedule, who are assigned to one. You can apply a filter to only schedule certain employees or rotations. Click the Load Rotations button.
17.	You've successfully scheduled employees using a shift rotation All of your employees that belong to a shift rotation have had their typical pattern of shifts assigned to them this week. If you need to revise or remove these shifts you can edit them to reflect each employee's availability and your location's labor demand.
18.	Save your changes and complete your schedule at a later time You can save your changes and complete your schedule later on. You don't need to complete it all at once. Click the Save button.

Step	Action
19.	Can your employees see their schedule? The schedule won't be available to your employees until it's posted. If you have the ability to post your schedule, when you click the Post button your employees will see when they are scheduled on the Calendar screen or on the mobile app.
20.	You've successfully started building a schedule! You're well on your way to completing this week's schedule. You've scheduled shifts manually and added a rotation. Later in the training we'll look at the steps involved in updating and finalizing your schedule before it's posted.
21.	End of Procedure.

Scheduling shifts in the grid view.

Scheduling is an important responsibility which can have a major impact on productivity. In manufacturing for example, the purpose of scheduling is to minimize the production time and costs, by telling a production facility what to make, with which staff, and on which equipment.

The Grid View allows you to see the most employees and the most days on one screen which makes it the most popular view for scheduling. Unless you're in the retail industry where scheduling is heavily impacted by hourly sales forecasts and hourly staffing coverage, you'll likely prefer the Grid View as well.

The Grid View displays each of your employees on a separate row of the grid.

By the end of this lesson, you'll be able to:

- Add multiple shifts
- Change the job an employee is scheduled to work
- Create an on-call shift
- Move a shift

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Aaron Lee
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Toronto, Ontario
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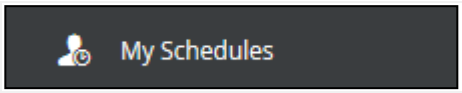
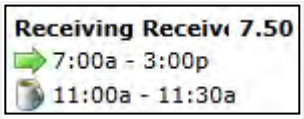
Procedure

Scenario
In this example, you're making changes to your location's schedule.

You'll schedule Alfonso to work from Monday to Friday, set Isabelle's shift to on-call, and move a shift from one employee to another.

Step	Action
1.	First, schedule Alfonso from Monday to Friday Click the Menu button.

Step	Action
2.	Click the My Schedules button. 
3.	Adding the same shift multiple times There are two steps involved with adding the same shift multiple times. First, you'll select the employees and days you want to schedule. Then, you'll create a shift for the selected days.
4.	Add the shifts Now that we've selected the employee and days, you'll add the shift. Click the Add button.
5.	Click the Close button.
6.	You've successfully added multiple shifts! Alfonso is now scheduled to work as a Receiving Receiver from 9AM – 5PM on Monday through Friday. If you need to update these shifts you can do so using the Edit or Delete buttons.

Step	Action
7.	Next, schedule Isabelle to be on-call on Monday Click the Monday cell.
8.	Click the Edit Shift button.
9.	On-call shifts The On-Call button has three statuses: Inactive, Standby, and Confirmed. The button is inactive by default. To make the shift On-Call, you'll click it once.
10.	Set Isabelle's shift to on-call Click the On call button.
11.	Isabelle's shift is now set to be on-call If you need to call-in the employee, just come back and click the button again. It'll change to 'Confirmed' and will notify the employee via SMS.
12.	Click the Close button.
13.	Lastly, Sally asked Isabelle to take her Tuesday shift As you're moving the shift you'll notice that Dayforce will grey out employees that are unable to work it. Click the Tuesday cell. 
14.	You've successfully moved the shift! Isabelle is now scheduled to work Sally's Tuesday shift.
15.	Save your changes Click the Save button.

Step	Action
16.	End of Procedure.

Scheduling a split shift.

Split shift is a type of shift work where a person's normal work day is split into two or more segments; for example a person may work from 5AM to 9AM and then have a break until 3PM at which point he might return to work until 7PM.

By the end of this lesson, you'll be able to:

- Schedule a split shift

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Joel Harris
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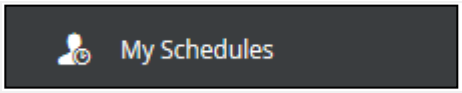
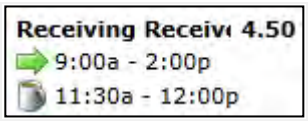
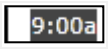
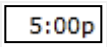
Procedure

Scenario
Amy is being scheduled for a shift from 9AM - 2PM and 3PM - 7PM. Create this split shift on the schedule.

Step	Action
1.	Open My Schedules That is where you will be able to create a split shift. Click the Menu button.

Step	Action
2.	Click the My Schedules menu. 

Step	Action
3.	Add the second segment of 3PM-7PM to Amy's Monday shift To create a split shift you'll add the first segment and then the second. In this example the first segment has already been added for you. Click the Monday cell. 
4.	Click the Add button.
5.	First, set the shift's start time Click in the Start Time field. 
6.	Enter the desired information into the Shift Start Time field. Enter "3p".
7.	Next, set the shift's end time Click in the End Time field. 
8.	Enter the desired information into the End Time field. Enter "7p".
9.	Add a meal to her shift Click the Add Meal button.
10.	Lastly, save the shift Remember, you'll save a shift by clicking the Close button. Click the Save button.
11.	You've successfully added a split shift for Amy Amy is now scheduled to work two shifts on Monday: 9AM – 2PM and 3PM – 7PM. Notice her Monday cell has one row for each segment of the split shift.

Step	Action
12.	Save your changes Click the Save button.
13.	End of Procedure.

Adding shift rotations in the grid view.

This lesson describes how to create schedules using the pre-defined shift rotations that have been set up by your organization.

By the end of this lesson, you'll be able to:

- Load pre-defined shift rotations into the schedule for your location

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Joel Harris
Senior eLearning Consultant
Toronto, Ontario
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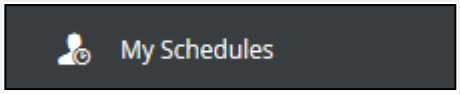
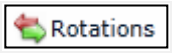
Procedure

Scenario
You're ready to create a new schedule for your location.

Begin by loading an existing Shift Rotation onto the new schedule.

Step	Action
1.	Open My Schedules This is where you will be loading the shift rotations Click the Menu button.
2.	Click the My Schedules button. 
3.	How do employees get assigned to shift rotations? Your employees are already assigned to shift rotations in Dayforce. These are set when an employee is being onboarded or under My HR > Assignments. In this lesson, you learn how to load your rotations onto the schedule.
4.	First, load the rotation You can access and load your rotations using the Rotations button. Click the Rotations button. 

Step	Action
5.	Next, select the rotation you want to load When you select a rotation your schedule will be filtered to only show employees belonging to that rotation. In this example you'll select the Evening rotation. Click the Rotation Selection button. ...
6.	Note: the rotations in your organization will likely be different. They're created by your HR administrator. Click the Evening list item. Evening
7.	Click the Close button. Close
8.	Load the Rotations onto the schedule Click the Load Rotations button. Load Rotations
9.	A schedule generates automatically Dayforce will build a schedule for all employees that have been assigned to the selected rotation. In this example, five employees with shifts in the evening have been scheduled.
10.	Save your changes Click the Save button. Save
11.	You've successfully added shift rotations in the grid view! All of your employees belonging to the Evening rotation are now scheduled for this week. Once you Post the schedule they'll be able to log into Dayforce and view when they work next.
12.	End of Procedure.

Verifying the schedule in the grid view.

As you create the schedule, you may encounter problems that prevent you from saving it. You may need to make adjustments before posting it for your employees.

By the end of this lesson you'll be able to:

- Find and correct schedule problems

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Joel Harris
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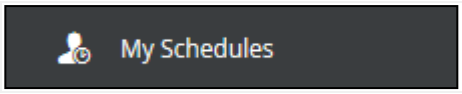
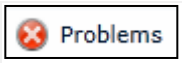
joel.harris@ceridian.com

Procedure

Scenario
Check your schedule for problems before saving it.

Step	Action
1.	Open My Schedules Click the Menu button.
2.	Click the My Schedules button. 
3.	Start by reviewing the Problems panel This is where you'll be notified of any issues associated with the schedule you're working on. Click the Problems button. 
4.	Schedule problems and severities When you're creating a schedule, Dayforce checks the shifts you create for errors and validates them against your company's schedule policy. For example, you might see an error message if you add a shift during an employee's approved vacation. You'll see four severities of scheduling problems. In order of severity: - *Informational* - *Warning* - *Error* - *Critical** **Schedule can't be saved*
5.	Schedule problems: Informational An Informational problem is something you should be aware of. They usually don't require action. In this example, your company policy recommends that back-to-back shifts should start at least 8 hours from each other. Isabelle's shift on Tuesday begins less than 8 hours after her Monday shift ends. It's up to you to determine if you need to act on Informational problems.

Step	Action
6.	Schedule problems: Critical and Warning Critical and Warning severities are similar. You can't save a schedule containing a Critical problem. It needs to be corrected before Dayforce will allow you to save because it violates the schedule policy your company configured. A warning, however, is a problem that usually needs to be corrected but can, in some exceptions, be allowed. Due to the possibility of exceptions, Dayforce will allow you to save a schedule that contains warnings.
7.	Filter the Problems panel to only show Critical problems These must be resolved before the schedule can be saved. Click the Warning Toggle button.
8.	Click the Informational Toggle button.
9.	Find and remove Sharon's problem shift In this example, Sharon was accidentally scheduled for two shifts that completely overlap each other. The overlapping shifts are causing 2 problems. To locate the shift causing the problem, select the problem and click the Next button. Click the Problem list item.
10.	Locate the problem shift Clicking the next button will bring you to the shift on the schedule. Click the Next button.
11.	Delete the overlapping shift Deleting this shift will resolve the issues associated with Sharon's schedule. Click the Delete button.

Step	Action
12.	You've successfully removed Sharon's problem shift! The problem automatically disappears from the Problems panel once it has been resolved.
13.	Additional examples of Warnings and Errors Note: Severities are set by your organization. The issues below may be marked as different severities. Warnings - Scheduling employees when they are unavailable - Scheduling multiple shifts for the same employee too close together - Scheduling employees for too long on a single day or the entire week - Not scheduling employees for long enough on a single day or the entire week - Scheduling employees to too many shifts on a single day - Scheduling employees on too many days during one week - Not scheduling employees on enough days during one week - Scheduling employees for too many night shifts during one week - Scheduling employees to too many consecutive night shifts Errors - Scheduling the same employee to overlapping shifts - Adding a shift with an end time before its start time - Scheduling an employee during an approved time away from work request
14.	Find and correct another critical problem In this example, Alfonso isn't available to work on Tuesday because he has approved time off . Give his shift on this day to another qualified employee. Click the Problem list item.
15.	Click the Next button.
16.	Give this shift to Katie instead Although Alfonso isn't available to work on Tuesday, Katie is. By giving this shift to Katie you'll resolve the issue associated with Alfonso's schedule. Click the Edit button.

Step	Action
17.	Click the Employee list. Alfonso Boyd
18.	Click the Katie Nash list item. Katie Nash
19.	Click the Close button. Close
20.	Click the Close button.
21.	You've successfully resolved the Critical problems on your schedule! Now that all Critical problems have been removed from your schedule you can proceed to save and post it. When you're building a schedule it's best to pay close attention to all Warnings and Informational problems as well and resolve them if necessary.
22.	Save your changes You're now able to save the schedule as the remaining problems are only Warnings and Informational. Click the Save button. Save
23.	Post the schedule Click the Post button. Post
24.	End of Procedure.

Scheduling shifts in the bar view.

Retailers must consider fluctuating sales and meet labor demand and labor budgets. Scheduling employees in the bar view makes it easy to spot the busiest times of day and ultimately add extra staffing during these peak sales periods.

Using the Bar View, you can create schedules for your location by dragging shifts into position on the graph with your mouse.

By the end of this lesson you'll be able to:

- Switch My Schedules to the bar view
- Select multiple employees to schedule
- Schedule selected employees in a continuous cycle
- Schedule multiple employees with the same start and end time.

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Charlene Fernandes
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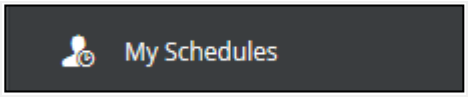
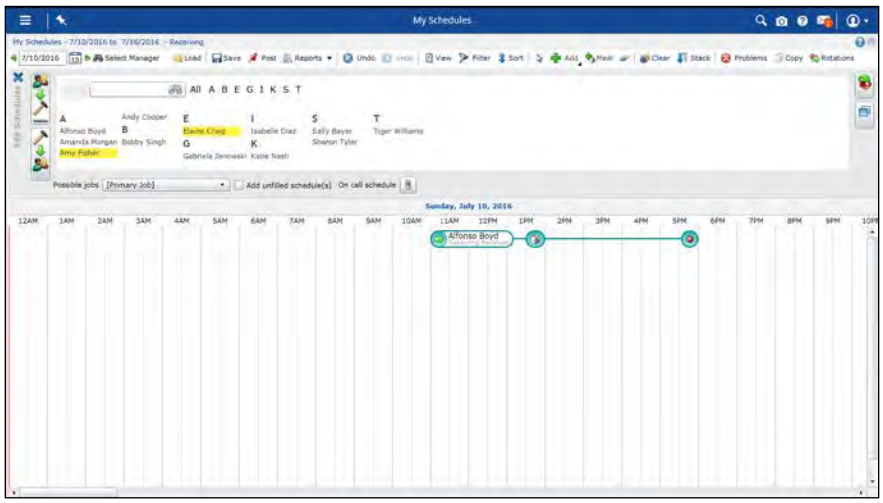
charlene.fernandes@ceridian.com

Procedure

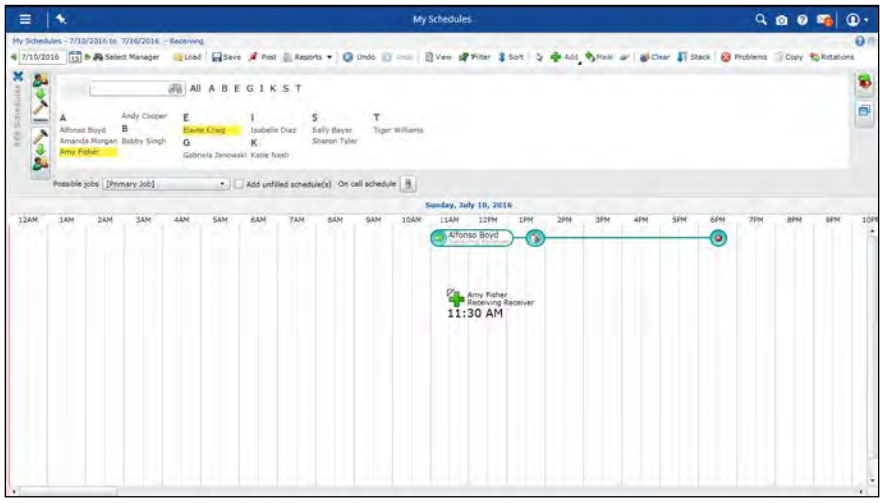
Scenario
In this example, you're creating a store schedule for Sunday and Monday.

Step	Action
1.	Open My Schedules Click the Menu button.

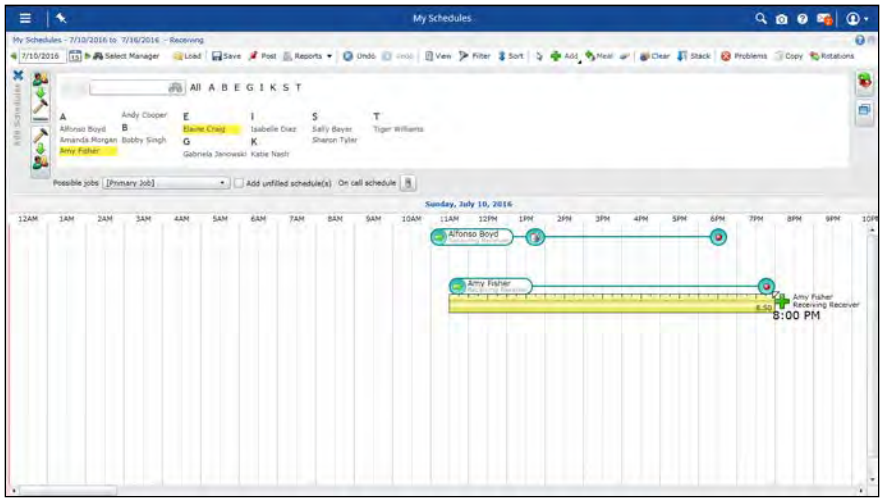
Step	Action
2.	Click the My Schedules menu. 
3.	Add a new shift Click the Add button.
4.	Select the employee you want to schedule Click the Alfonso Boyd link.
5.	Press and hold the CTRL key to select the second and third employees Press the [Ctrl] key and click the Amy Fisher button.
6.	Press the [Ctrl] key and click the Elaine Craig.
7.	Click & Drag To create the shift, click and drag your mouse from the 11 AM column to 6 PM column.



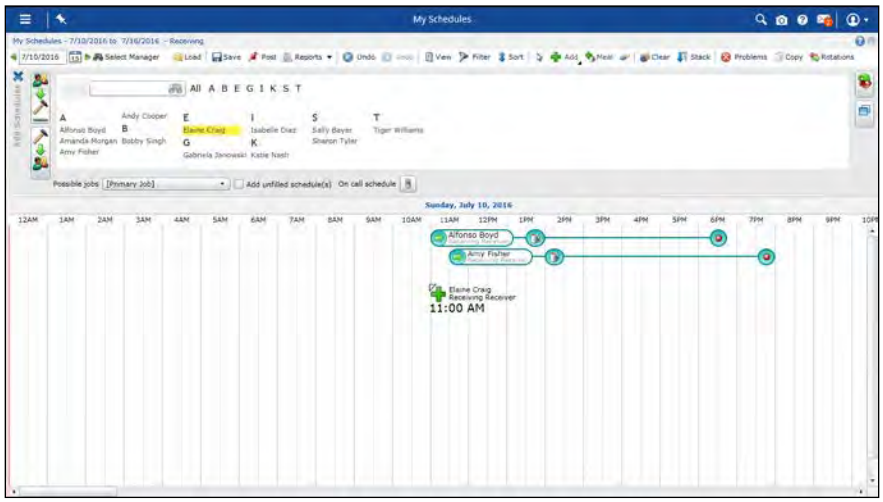
Step	Action
8.	Release the mouse button.
9.	Your mouse pointer switches to the next selected employee The first employee has been scheduled. You'll notice Alfonso's name is no longer highlighted in the employee list. Continue scheduling the remaining two employees.



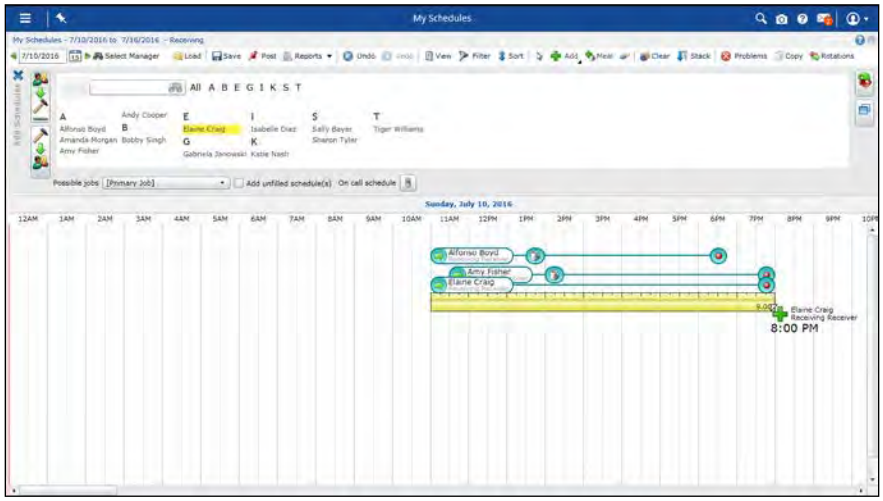
Step	Action
10.	Press the left mouse button and drag the mouse to the desired location.



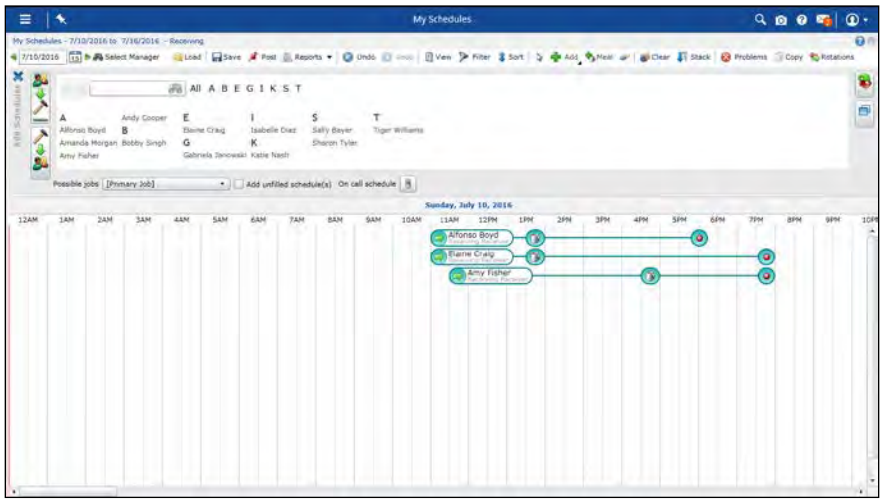
Step	Action
11.	Release the mouse button.



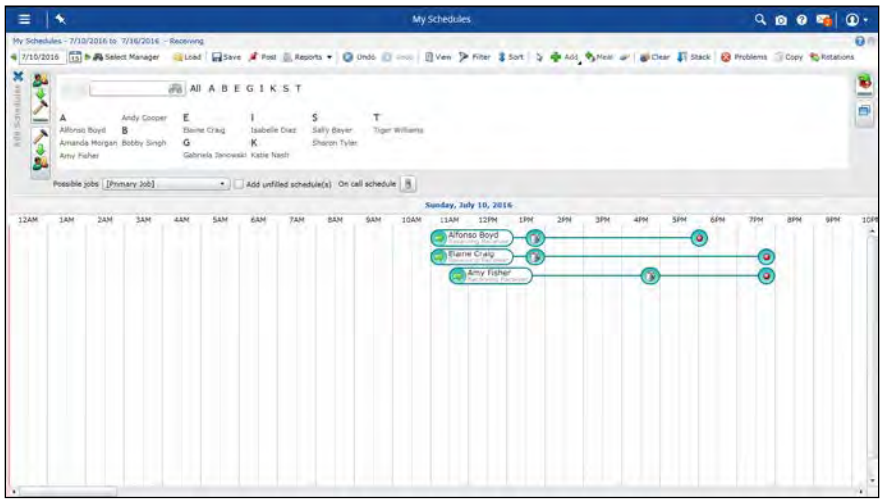
Step	Action
12.	Press the left mouse button and drag the mouse to the desired location.



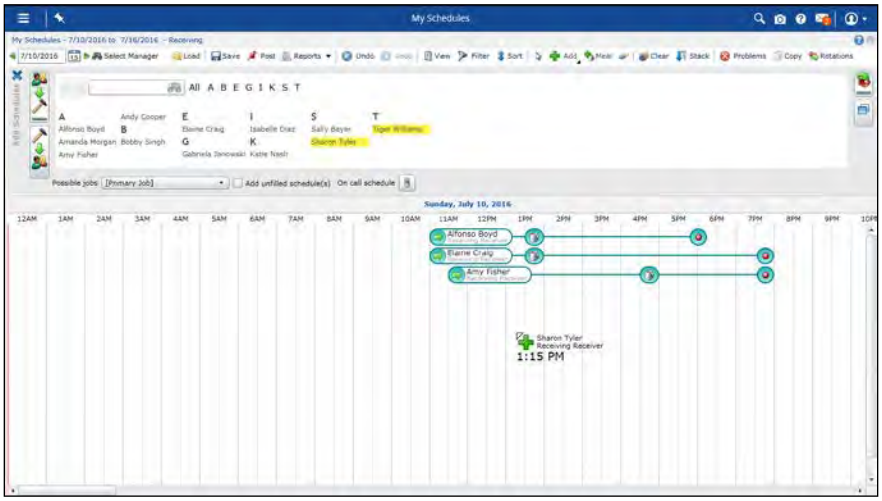
Step	Action
13.	Release the mouse button.



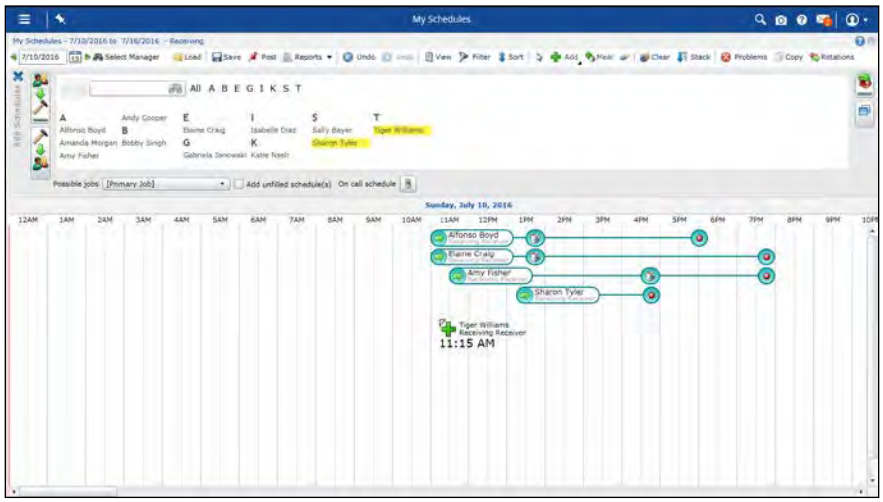
Step	Action
14.	Create a repeating selection to schedule employees across multiple days Do you sometimes schedule the same people across multiple days? With the cycle function, your selection cycles through each employee then repeats. In this example, you need to schedule Sharon and Tiger on Sunday and again on Monday. Use the cycle function to maintain and repeat your selection for both days. Click the Cycle through selected employees button.



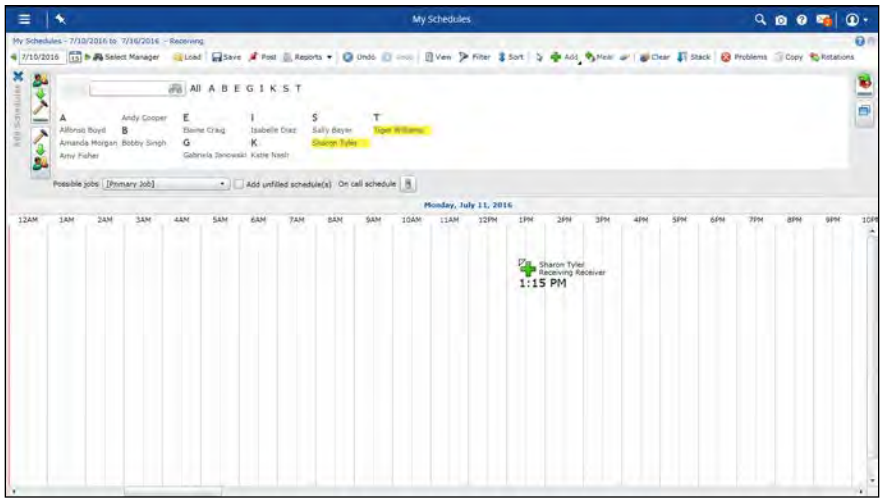
Step	Action
15.	Select the employees Click the Sharon Tyler link. Sharon Tyler
16.	Press the [Ctrl] key and click the Tiger Williams link. Tiger Williams



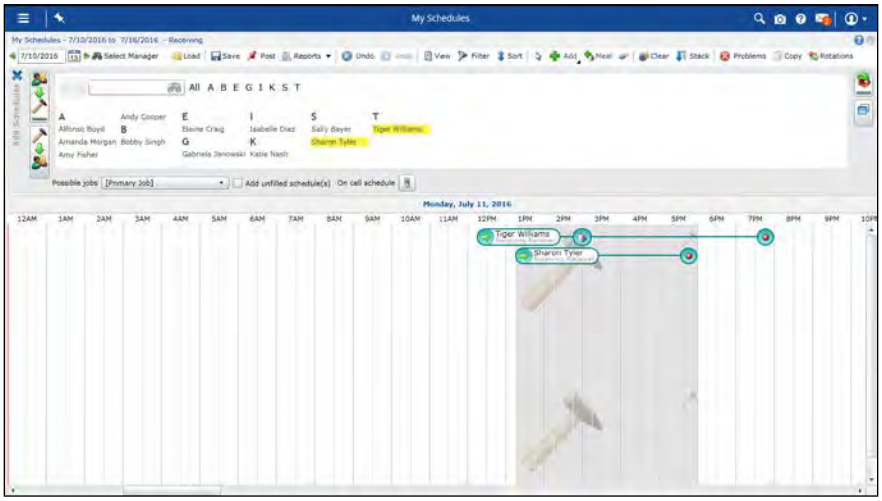
Step	Action
17.	Start by scheduling both employees on Monday. Click & Drag
18.	Release the mouse button.



Step	Action
19.	Press the left mouse button and drag the mouse to the desired location.
20.	Both employees have been scheduled for Sunday Notice how your cursor automatically cycles back to Sharon, the first employee you selected. You can now move to Monday and schedule two more shifts.
21.	Use the keyboard to quickly move to different days of the week In this example, the week starts on a Sunday. Press the number 2 to advance to Monday, the second day of the week. Press [2].

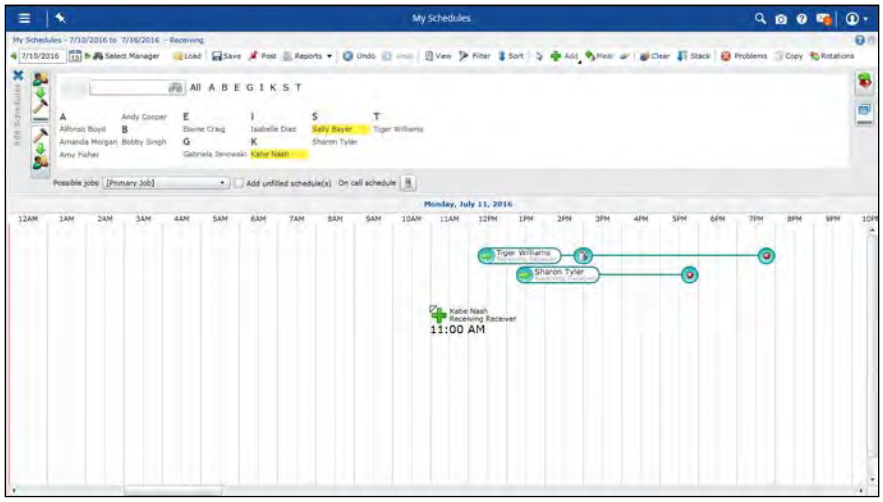


Step	Action
22.	Click & Drag To create the shift, click and drag your mouse from the 1:15 PM column to 6 PM column.
23.	Release the mouse button.
24.	Release the mouse button.

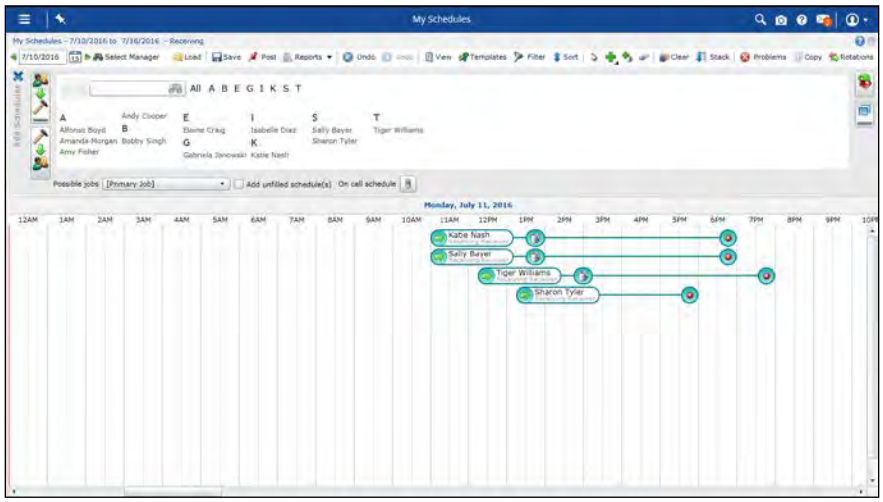


Step	Action
25.	You've successfully scheduled Sharon and Tiger on Sunday and Monday! Turn off employee cycling. Click the Cycle through selected employees button.
26.	Schedule multiple employees with the same start and end time Click the Add all employees at the same time as the first button.
27.	Select the employees Click the Katie Nash link.

Step	Action
28.	Press the [Ctrl] key and click the Sally Bayer link. Sally Bayer



Step	Action
29.	Click & Drag To create the shift, click and drag your mouse from the 11 AM column to 7 PM column.
30.	Release the mouse button.
31.	Katie and Sally have been scheduled with the same shift



Step	Action
32.	Save your changes Click the Save button.
33.	End of Procedure.

Editing a shift.

Using the Bar View, you can edit shifts by stretching or shrinking them to the correct duration, and adding or moving scheduled meal breaks on each shift with your mouse.

After completing this lesson, you'll be able to:

- Change a job
- Add an activity
- Create an on-call shift
- Adjust the length of a shift

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Aaron Lee
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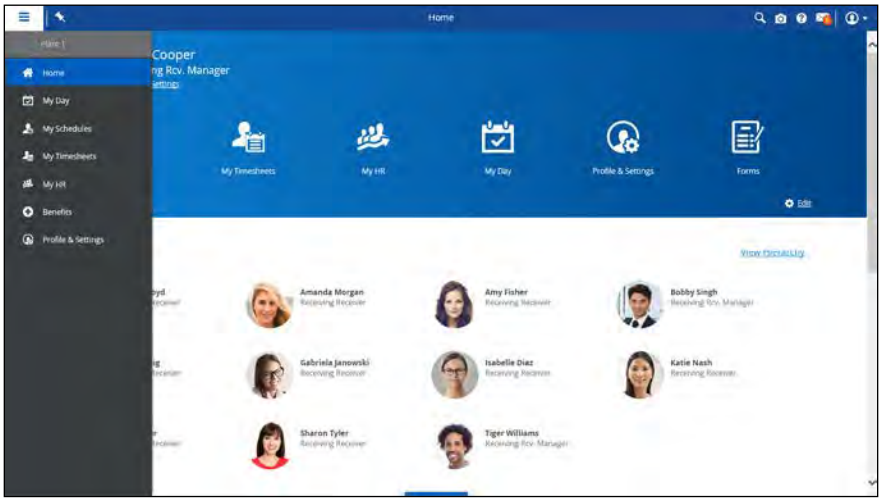
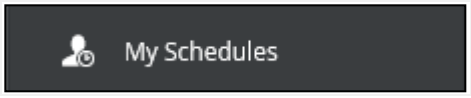
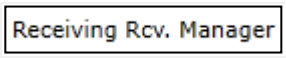
Procedure

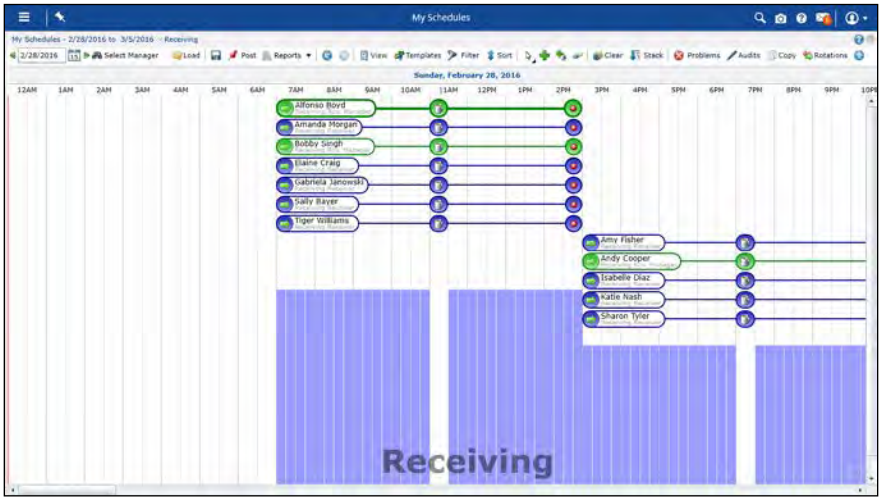
Scenario
In this example, you initially scheduled Alfonso to work as a Receiving Receiver. However, you now need to change his job to be On-Call as a Receiving Rcv Manager.

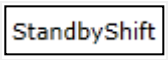
Step	Action
1.	Load the schedule for Alfonso to change his job to be on call as a Receiving Rcv Manager Click the Expand button.

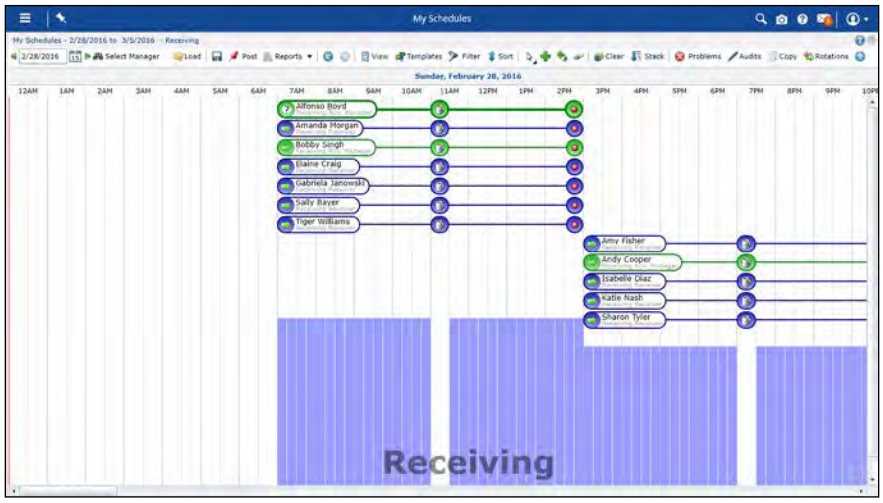


Step	Action
2.	Click the My Schedules button. 

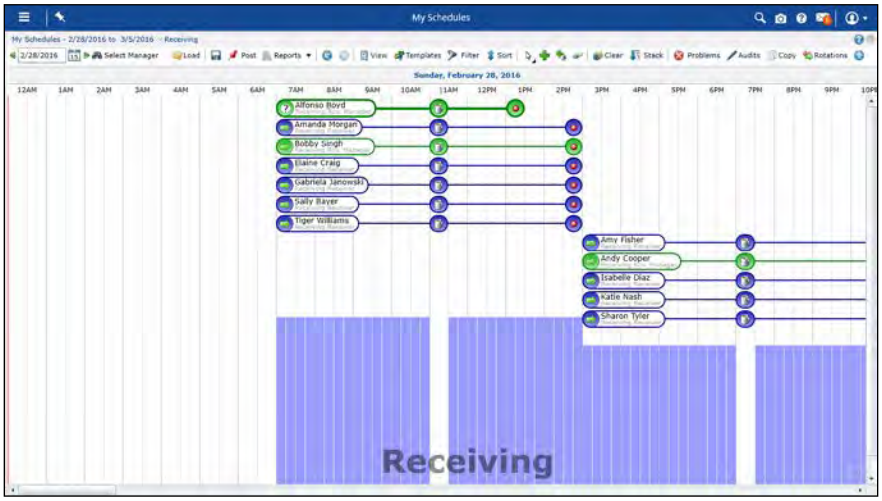
Step	Action
3.	Change Alfonso's job First, click the Select tool from the toolbar and then click Alfonso's shift that requires revision. Click the Select button.
4.	Click the Alfonso Boyd list item.
5.	Click the Alternate Job button.
6.	Select the new job he will be performing The list will only show jobs that the employee is qualified to work. Click the Receiving Rcv. Manager list item. 
7.	You've successfully changed Alfonso's job On Monday, Alfonso will now be working as a Receiving Rcv Manager instead of a Receiving Receiver.



Step	Action
8.	Set Alfonso to be on-call Click the Alfonso Boyd list item.
9.	Click the On-call graphic.
10.	Click the Standby Shift list item. 
11.	On-Call Statuses: Inactive, Standby, and Confirmed Alfonso's shift is now scheduled as On-Call. The On-Call button has three statuses. The button is inactive by default. To make the shift On-Call, select StandbyShift. If you need to call-in the employee, just come back, click the button again, and confirm the call-in. It'll change to 'Confirmed' and will notify the employee via SMS.



Step	Action
12.	Shorten Alfonso's shift by two hours You can adjust the length of a shift by dragging one of its edges. Click & Drag To shorten the shift, click and drag your mouse from the 5 PM column to 3 PM column. Press the left mouse button and drag the mouse to the desired location.
13.	You've successfully shortened Alfonso's shift by two hours



Step	Action
14.	Save your changes Click the Save button.
15.	End of Procedure.

Adding shift rotations in the bar view.

This lesson describes how to create schedules using the pre-defined shift rotations that have been set up by your organization.

By the end of this lesson, you'll be able to:

- Load pre-defined shift rotations into the schedule for your location

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Aaron Lee
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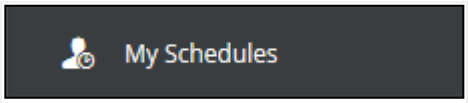
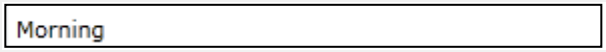
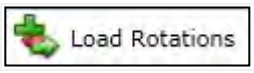
Procedure

Scenario
In this example, it's time for you to create a new schedule for your location. Start the process by loading existing Shift Rotations into the new schedule.

Step	Action
1.	How do employees get assigned to shift rotations? Your employees are already assigned to shift rotations in Dayforce. These are set when an employee is being onboarded or under My HR > Assignments. In this lesson, you learn how to load your rotations onto the schedule.

Step	Action
2.	Load the morning rotations onto next week's schedule Click in the Menu field.
3.	Click the My Schedules button. 
4.	Load the morning rotation Click the Rotations tab.
5.	Click the Rotation button.
6.	The rotations in your organization will likely be different. They're created by your HR administrator. Click the Morning list item. 
7.	Click the Close button.

Step	Action
8.	Click the Load Rotations button. 
9.	A schedule has been generated for all employees that are assigned to the selected rotation In this example, nine employees with a rotation (07:00 am to 02:00 pm) have been scheduled
10.	Save your changes Click the Save button.
11.	End of Procedure.

Verifying the schedule in the bar view.

As you create the schedule, you may encounter problems that prevent you from saving it. You may need to make adjustments before posting it for your employees.

By the end of this lesson you'll be able to:

- Find and correct schedule problems

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Aaron Lee
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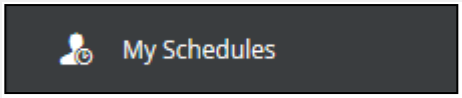
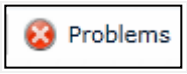
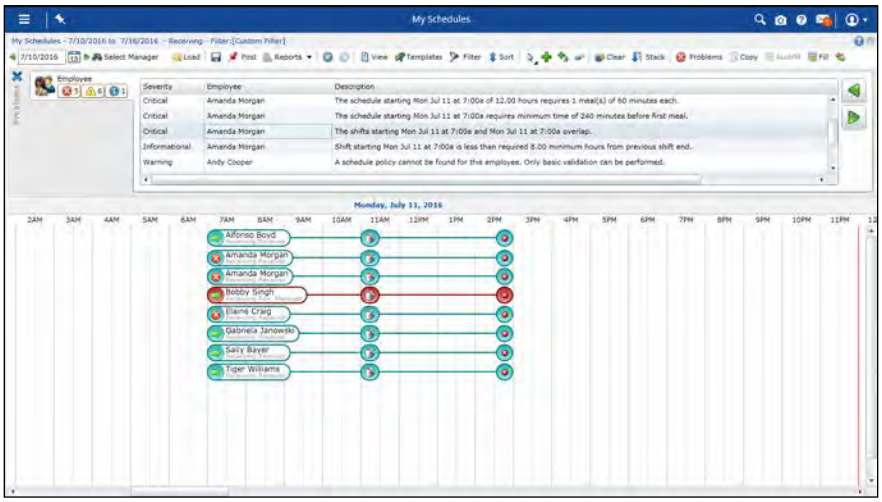
Procedure

Scenario
In this example, you've created a schedule for the week of July 11th. Check it for problems before saving.

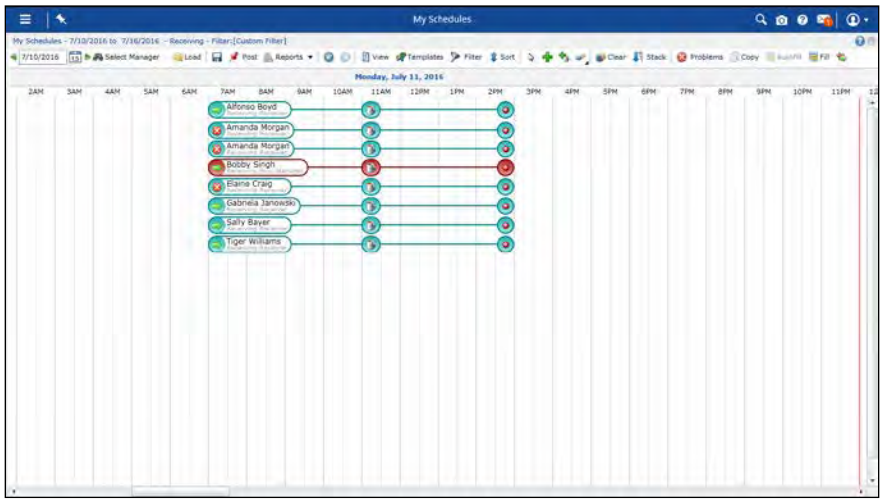
Step	Action
1.	Check for scheduling problems before saving Click the Menu button.
2.	Click the My Schedules button. 
3.	Display the Problems panel Click the Problems button. 

Step	Action
4.	Schedule problems and severities When you're creating a schedule, Dayforce checks the shifts you create for errors and validates them against your company's schedule policy. For example, you might see an error message if you add a shift during an employee's approved vacation. You'll see four severities of scheduling problems. In order of severity: - *Informational* - *Warning* - *Error** - *Critical** **Schedule can't be saved*
5.	Schedule problems: Informational An Informational problem is something you should be aware of. It usually doesn't require action. In this example, your company policy recommends that back-to-back shifts should start at least 8 hours from each other. Amanda's shift on Tuesday begins less than 8 hours after her Monday shift ends. It's up to you to determine if you need to act on this information. Additional Examples - Any shifts scheduled during the same time as an employee's pending time away from work request. If the time away from work request is rejected, there is no problem with the shift. However, if the request is accepted, the employee will be unavailable to work during the shift and this shift would have a critical problem on it.
6.	Schedule problems: Critical and Warning Critical and Warning severities are similar. You can't save a schedule containing a Critical problem. It needs to be corrected before Dayforce will allow you to save because it violates the schedule policy your company configured. A warning however, is a problem that usually needs to be corrected but can, in some exceptions, be allowed. Due to the possibility of exceptions, Dayforce will allow you to save a schedule that contains warnings. In this example, Andy Cooper doesn't have a schedule policy assigned to him so only basic validation is done.

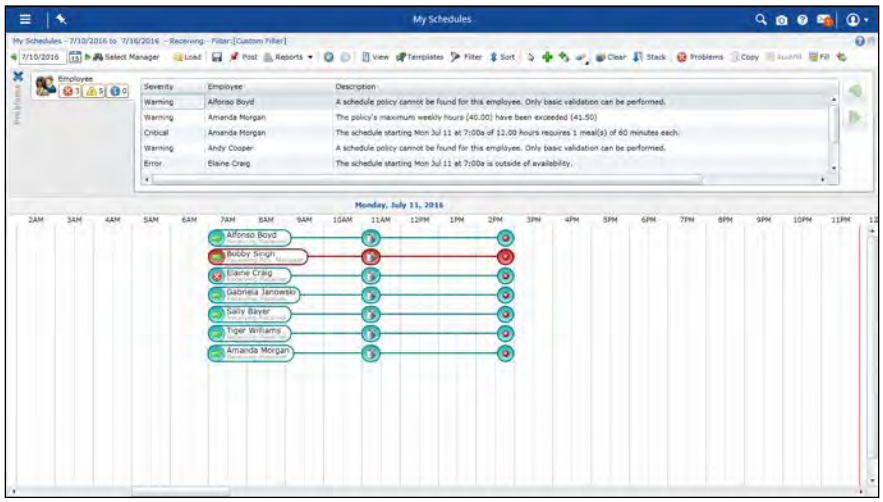
Step	Action
7.	Find and remove Amanda's problem shift In this example, Amanda was accidentally scheduled for two shifts that completely overlap each other. The overlapping shifts are causing 3 problems. To locate the shift causing the problem, select the problem and click the next button. Click the Problem tree item.
8.	Locate the shift on the schedule Use the Next button to find the selected shift. Click the Next button.



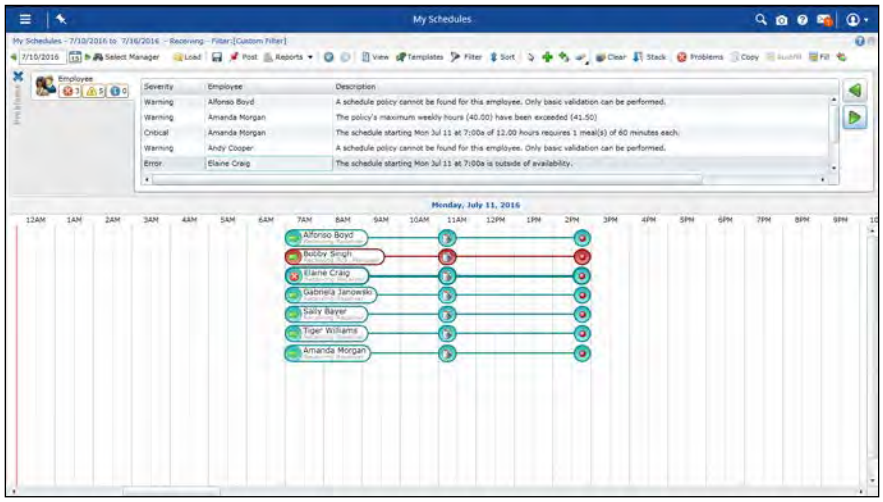
Step	Action
9.	Delete the second overlapping shift Click the Delete button.



Step	Action
10.	Click the Shift.
11.	Additional examples of Warnings and Errors Note: Severities are set by your organization. The issues below may be marked as different severities. Warnings - Scheduling employees when they are unavailable - Scheduling multiple shifts for the same employee too close together - Scheduling employees for too long on a single day or the entire week - Not scheduling employees for long enough on a single day or the entire week - Scheduling employees to too many shifts on a single day - Scheduling employees on too many days during one week - Not scheduling employees on enough days during one week - Scheduling employees for too many night shifts during one week - Scheduling employees to too many consecutive night shifts Errors - Scheduling the same employee to overlapping shifts - Adding a shift with an end time before its start time - Scheduling an employee during an approved time away from work request
12.	Find and delete Elaine's shift to correct the schedule error Click the Problems button.



Step	Action
13.	A problem marked as an error can be saved but may prevent you from closing the pay period until it's corrected. In this example, Elaine isn't available to work on the day she's scheduled. Delete the shift to remove the error. Click the Error Elaine Craig list item.
14.	Locate the shift Click the Next button.



Step	Action
15.	Click the Delete button.
16.	Click the Elaine Craig Shift.
17.	Save your changes For now, save your changes. Because the remaining problem is informational, Dayforce will allow you to save the schedule. Click the Save button.
18.	End of Procedure.

Scheduling employees using templates.

You can create two different kinds of templates in My Schedules:

- **Schedule Templates**. These templates contain multiple shifts, and are available only to the user who created them and for the location selected in the 'org picker' when they were created. Typically, they would be used in cases where you need to schedule shifts in the same pattern in different weeks. For example, if you needed to schedule six 9-5 shifts and four 5-10 shifts in the bakery department every Saturday.
- **Schedule Type Templates**. These templates are individual shifts. Typically, they would be used in case where you need to schedule the same shift in a variety of scenarios. For example, if you needed to schedule 9-5 shifts for the Bakery Clerk position, but did not need to schedule the same number of shifts week to week.

By the end of this lesson, you'll be able to:

- Export shifts into a template

- Import shifts from a template

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Creating and using a schedule template.

If you're scheduling the same set of shifts every week, you can make things easier by using schedule templates that you create yourself. Once, you've schedule these shifts once, you can export them as a template. This template can be imported as unfilled shifts into another schedule.

By the end of this lesson, you'll be able to:

- Export shifts into a template
- Import shifts from a template

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Aaron Lee
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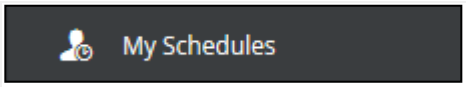
Procedure

Scenario
Each week Plant 1 will need two full time Managers and three full time Receivers.

Use the schedule you've already built to create a template that can be used to automatically add these shifts going forward.

Step	Action
1.	Open My Schedules Click the Menu button.
2.	Click the My Schedules button. 
3.	Press the left mouse button and drag the mouse to the desired location.
4.	You've successfully selected the shifts you'll use for your template! Next, you'll use the Export Template feature to save these shifts to a template that can be used for upcoming weeks.
5.	Point to the Monday cell.
6.	Create a template out of your selection Click the Edit Drop-Down button.
7.	Click the Export Template list item.

Step	Action
8.	Enter a name for your new template Click in the Template Name field.
9.	Enter the desired information into the Template Name field. Enter "Receiving Coverage".
10.	Save your template For the purpose of this lesson, the description has been entered for you Click the Save button.
11.	You've successfully created a template from your selection
12.	Next, apply the template to next week's schedule Click the Next week button.
13.	Load and apply the template Click the Templates button.
14.	Select the template Select the template you created earlier in the lesson. Click the Receiving Coverage list item.
15.	Click the Import button.
16.	The template shifts are imported as unfilled shifts In the next lesson, you'll learn to assign employees to these shifts.
17.	Save your changes Click the Save button.
18.	End of Procedure.

Assigning employees to unfilled shifts.

Once you've added unfilled shifts using a template, you can either fill schedules by manually assigning employees to shifts, or by having Dayforce fill shifts automatically.

By the end of this lesson, you'll be able to:

- Manually fill a shift
- Automatically fill shifts

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Aaron Lee
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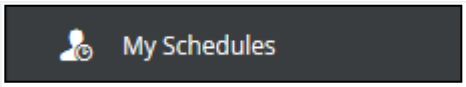
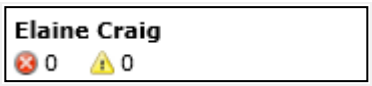
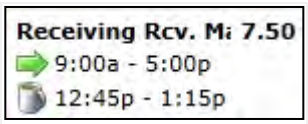
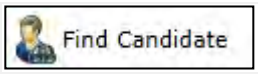
Procedure

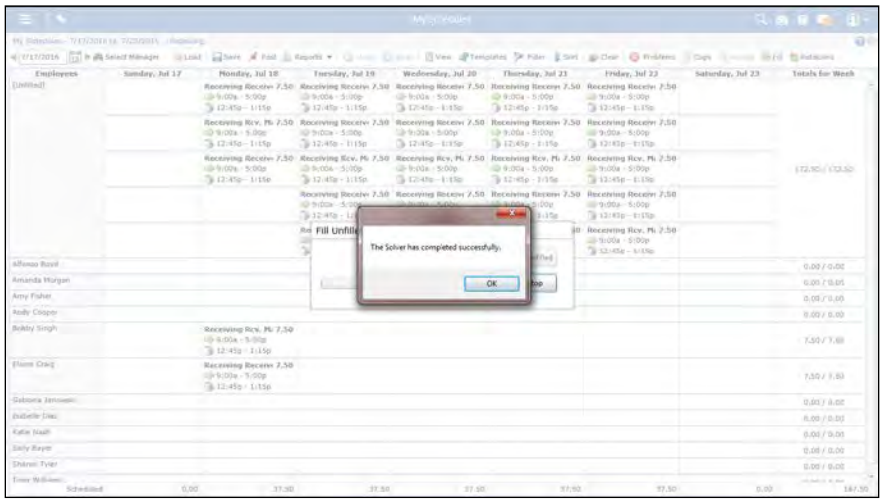
Scenario
You just imported a schedule template for five full time positions. These shifts are currently unfilled.

Use the Find Candidate feature to fill these shifts automatically.

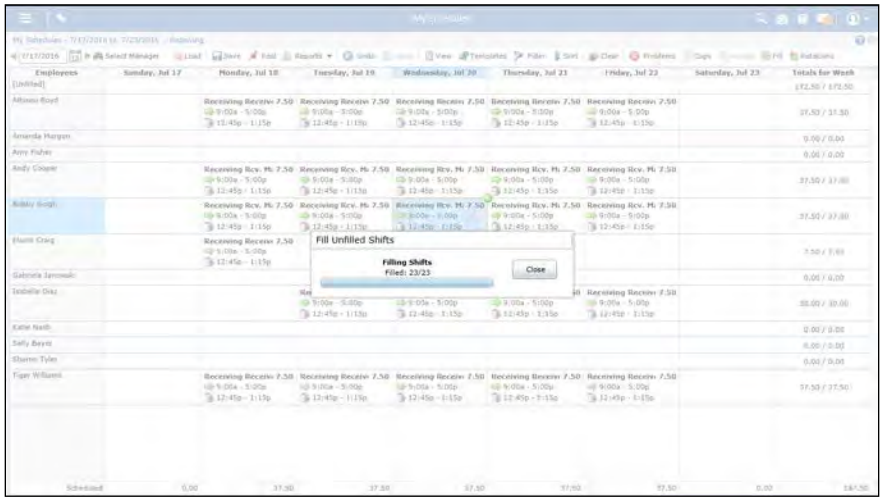
Step	Action
1.	Open My Schedules Click the Menu button.
2.	Click the My Schedules button. 
3.	Find a candidate for the first Monday shift Use the Find Candidate feature to give this shift to an eligible employee. Click the Monday pane.
4.	Click the Edit shift Drop-Down button.
5.	Click the Find candidate list item.

Step	Action
6.	Give this shift to Elaine Craig Only eligible employees appear in this pane. Click the Elaine Craig list item. 
7.	You've successfully scheduled Elaine Craig
8.	Next, review the Find Candidate options and schedule this shift Click the Shift pane. 
9.	Click the Edit shift Drop-down button.
10.	Click the Find candidate button. 
11.	Click the Configure options link.
12.	Open the Find Candidate Options Here you can control what employees appear in this pane and how they're sorted.
13.	Click the General options tab.
14.	General Options Here you can change the number of employees displayed or the maximum severity displayed. By default the maximum severity is set to None so you won't see any employees that would cause schedule problems.
15.	Change the order to show the most senior employees first Click the Employee ordering tab.

Step	Action
16.	Click the Most Senior First list item. Most Senior first
17.	Click the Apply changes link. Apply Changes
18.	You've successfully changed the employee order Go ahead and give this shift to the most senior eligible employee who, in this case, is Bobby Singh. Click the Bobby Singh list item. Bobby Singh 0 0
19.	Automatically fill the remaining unfilled shifts with your most senior employees Click the Fill button. Fill
20.	Click the Selected Values list item. Earliest Hire First
21.	Click the Most Senior First list item. Most Senior first
22.	Click the Fill Unfilled button. Fill Unfilled



Step	Action
23.	Click the OK button. OK



Step	Action
24.	Click the Close button. Close
25.	Save your changes Click the Save button. Save

Step	Action
26.	End of Procedure.

Creating and using a schedule type template.

In the last lesson, we looked at creating a schedule template that contained a set of shifts. You can also create a template for a single shift. You can then schedule this template shift for any employee on any day you chose.

By the end of this lesson, you'll be able to:

- Export a shift to a schedule type template
- Schedule a schedule type shift on a selected day or employee

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Aaron Lee
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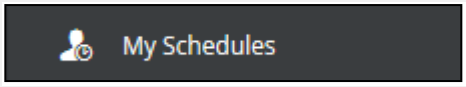
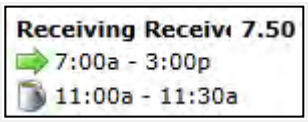
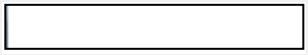
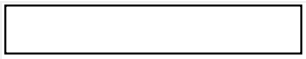
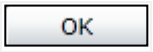
Procedure

Scenario
You are frequently scheduling an 8 hour 7 AM - 3 PM Receiving shift. You can speed things up by creating a schedule type template.

You've already added some of these shifts to the schedule. Create a template using them and then try adding them to employee schedules.

Step	Action
1.	Open My Schedules That is where you can create a template. Click the Menu button.
2.	Click the My Schedules button. 
3.	Create a template out of Alfonso's Monday Receiving shift Click the Shift pane. 
4.	Click the Edit shift Drop-down button.
5.	To create a template from a single shift, choose Export Type. Click the Export type list item.

Step	Action
6.	Name this template Click in the Template Name field. 
7.	Enter the desired information into the Template Name field. Enter "Receiver 7-3".
8.	Save your template To speed this lesson up the description has been added for you. Click the Save button.
9.	Close the Templates panel and apply the template Click the Close button.
10.	Apply the schedule type template to the selection Click the Edit shift Drop-Down button.
11.	Click the Receiver 7-3 list item.
12.	You've successfully applied the schedule template type! Amy is now scheduled to work as a Receiver from 7AM - 3PM on Tuesday, Wednesday, and Thursday.
13.	Schedule two more Receiver template shifts on Friday but leave them unfilled Use the schedule type template to create unfilled shifts. Click the Shift pane. 
14.	Click the Add Shift Drop-Down button.

Step	Action
15.	Use the More Options button to insert multiple template shifts Click the More Options button.
16.	Click in the Quantity field.
17.	Enter the desired information into the Quantity field. Enter "2".
18.	Click the OK button. 
19.	Save your changes Click the Save button.
20.	End of Procedure.

Advanced template scheduling.

Advanced template scheduling creates a schedule of unstaffed shifts using a template tailored to your specific business needs.

This streamlines the process of repeatedly creating the same pattern of shifts on a regular basis. Shifts created using advanced template scheduling can be manually filled or automatically assigned to your employees by Dayforce.

By the end of this lesson, you'll be able to:

- Import a schedule template
- Automatically fill shifts using auto-fill
- Manually fill shifts to eligible employees using Find Candidate

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Aaron Lee
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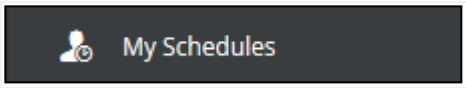
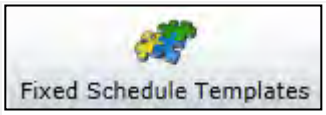
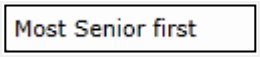
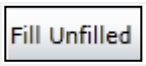
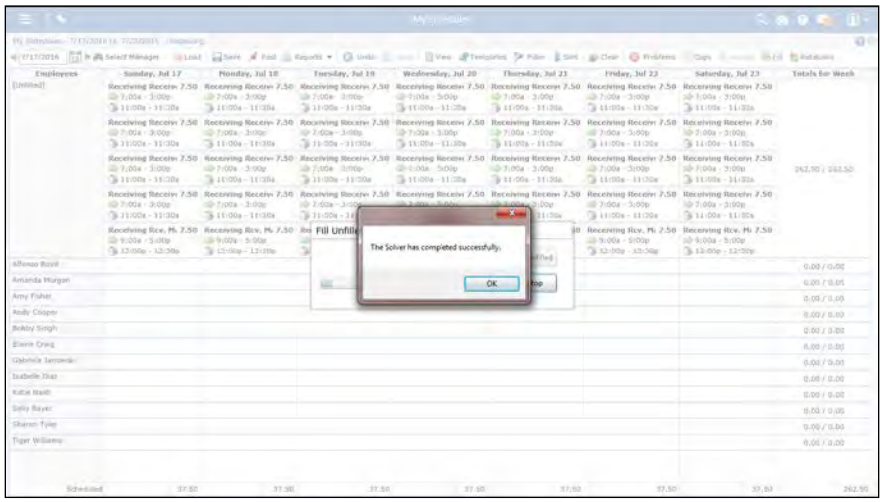
Procedure

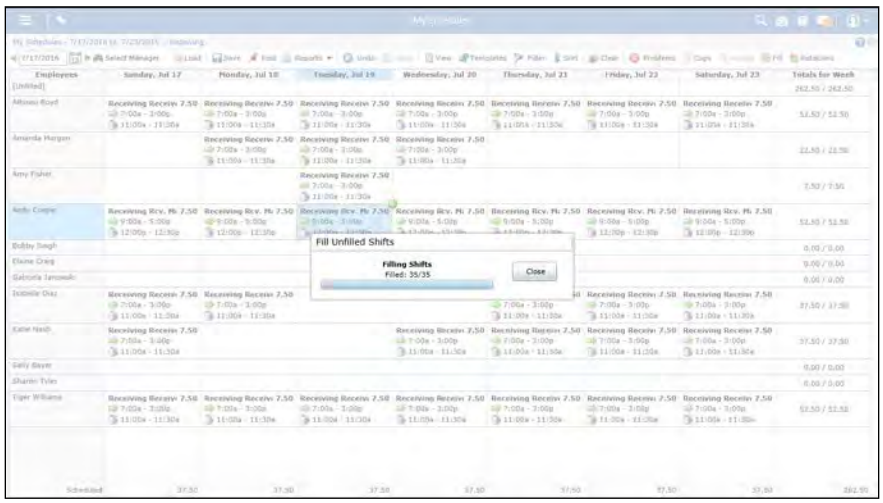
Scenario
Use the 'Weekday USA' template to build a schedule for Plant 1.

Step	Action
1.	Start by navigating to My Schedules Click the Menu button.
2.	Click the My Schedules button. 
3.	Import a fixed schedule template You'll import and fill fixed schedule templates from My Schedules. Click the Templates button.

Step	Action
4.	Click the Fixed Schedule Template tab. 
5.	Import a template These fixed schedule templates are created by your administrator. In this example you'll load the Weekday USA template. Click in the Weekday USA field.
6.	Click the Import button.
7.	The template imports positions as unfilled shifts Next, you'll need to assign employees to all of these positions.
8.	Click the Close button.
9.	Fill the shifts automatically according to seniority Automatically assign the available shifts to your employees using Auto-fill. Click the Fill button.
10.	Select the Ordering Rule The Ordering Rules determine how shifts are assigned to employees and then allocates accordingly. Click the Selected Values list item.
11.	Click the Most Senior First list item. 
12.	Click the Fill Unfilled button. 



Step	Action
13.	Click the OK button. OK



Step	Action
14.	Auto-fill is complete and all the shifts are filled If you happened to have unfilled shifts after Auto-fill has finished you'd manually assign them to employees by dragging and dropping or via Find Candidate. Click the Close button. Close

Step	Action
15.	Save your changes Click the Save button. Save
16.	End of Procedure.

Copying a schedule from a previous week.

In Dayforce, you can navigate to the schedule for any future week. These future schedules will initially be blank. Instead of creating these new schedules from scratch, you can copy your location's schedules from a previous week.

Though we'll view this lesson in the grid view, this functionality is also available in the bar view.

After completing this lesson, you'll be able to:

- Copy a schedule from a previous week

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Aaron Lee
eLearning Developer
Toronto, Ontario
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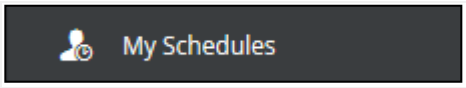
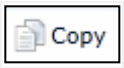
Procedure

Scenario
In this example, you're creating a schedule by copying the previous week's shifts.

Step	Action
1.	Open My Schedules Click the Menu button.
2.	Click the My Schedules button. 
3.	Copy the previous week's shifts into the loaded schedule Click the Copy button. 
4.	Copy week parameters You can choose from which week you would like to copy shifts. You can also select specific zones, days or jobs. The generate unfilled schedules option Select the Generate unfilled schedules check box to copy the previous week's shifts over as unfilled shifts. Clear the check box and the application assigns the same employees to the shifts in the previous week when they are copied.
5.	Click the Copy week button.

Step	Action
6.	Save your changes The desired shifts are now copied onto the schedule. Click the Save button.
7.	End of Procedure.

Editing a schedule.

After adding shifts to a schedule you can update them as required. You'll probably need to move things around to reflect employee availability, fluctuating labor demand, and address any problems your schedule might contain.

In this lesson you'll review the fundamentals of performing updates to your weekly schedule.

After completing this lesson, you'll be able to:

- Move a shift
- Edit a shift
- Identify and resolve schedule problems

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***

Narrated by Joel Harris

Senior eLearning Consultant

Toronto, Ontario

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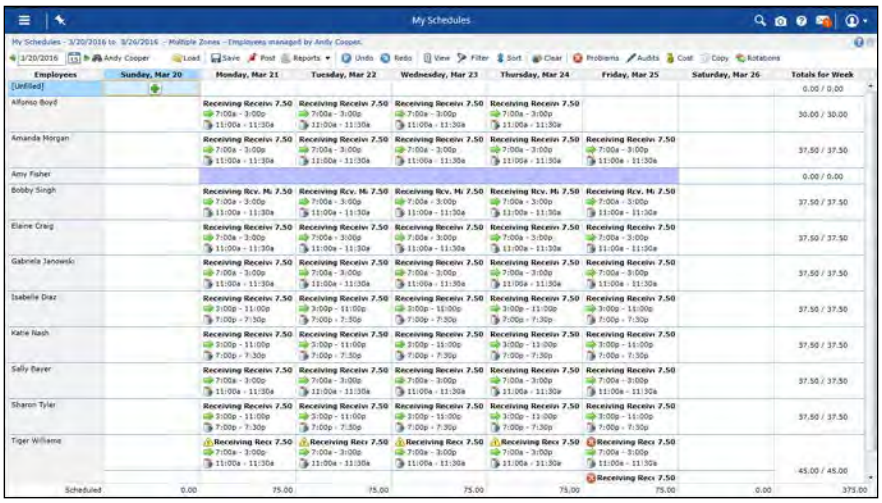
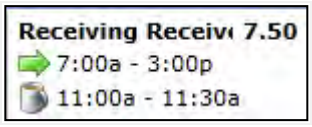
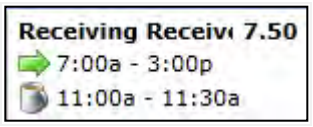
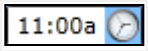
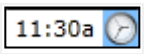
Procedure

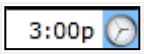
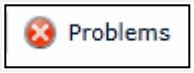
Scenario
In this lesson, you'll learn how to update the schedule, edit shifts and use the Problems panel to check if it contains any issues.

Step	Action
1.	Editing a schedule Odds are you'll need to revise some shifts after adding them. Maybe an employee's availability has changed, your location will be particularly busy or slow, or you simply made a mistake when adding a shift. To adjust your schedule you can move shifts around or edit their details.
2.	Moving a shift You can move a shift by first selecting it and then dragging and dropping the green ball icon in the top right corner. When you move a shift you'll notice some cells on the schedule turn grey. This represents employees who are unable to work the shift. Dayforce prevents you from mistakenly giving a shift to an employee who is unqualified or unavailable to work it.



Step	Action
3.	Move Alfonso's Monday shift to Friday This week you're going to be busier on Friday than Monday. Click the Shift pane. 
4.	Press the left mouse button and drag the mouse to the desired location.

Step	Action
5.	You've successfully moved a shift Alfonso is now expected to come into work on Friday instead of Monday. Next, review how to edit a shift's details.
6.	Update Gabriela's Friday shift On Friday we need Gabriela to work in the evening instead of the morning. Update her shift times. Click the Shift pane. 
7.	Click the Edit button.
8.	Update her start time Her shift should start at 3PM. Click in the Start Time field.
9.	Enter the desired information into the Start Time field. Enter "3p".
10.	Update her meal times It should start at 7PM and end at 7:30PM. Click in the Meal Start field. 
11.	Enter the desired information into the Meal Start field. Enter "7p".
12.	Click in the Meal End field. 
13.	Enter the desired information into the Meal End field. Enter "0p".

Step	Action
14.	Lastly, update her end time Her shift will now end at 11PM. Click in the End Time field. 
15.	Enter the desired information into the End Time field. Enter "11p".
16.	Add your edits to the schedule Click the Close button.
17.	You've successfully edited a shift After a shift has been added to the schedule you can update the employee's start and end times, meals, and work assignment. If you need to remove the shift you can click the Delete button after selecting it.
18.	Checking your schedule for problems Shifts with problems will have an icon in their top left corner. Different icons are used depending on the severity of the problem. Dayforce helps you research and resolve each issue. You can use the Problems panel to find out what caused each problem.
19.	Check your schedule for problems Click the Problems button. 
20.	Tiger Williams has problems associated with his shifts The Problems panel tells us Tiger has exceeded the maximum amount of hours per week, has shifts scheduled too close to one another, and has two shifts that overlap. After assessing these problems it appears you accidentally added two shifts at the same time for Tiger which are causing these three problems. Use the Next button to locate and remove the overlapping shifts. This will resolve all three problems.

Step	Action
21.	Locate the shift causing these problems Click the Next button.
22.	Delete the overlapping shift Click the Delete button.
23.	Your schedule now meets your company's requirements Once the overlapping shift was removed, Tiger's Critical, Warning, and Informational problems disappear. Although you would have been able to save the schedule with Warning and Informational problems, you wouldn't have been able to with an outstanding Critical problem. Now that your schedule is problem-free you can close the panel and save your changes.
24.	Click the Close button.
25.	Save your changes Click the Save button.
26.	You've successfully edited a schedule! Now that you've updated shifts and resolved problems you're ready to move on to the final steps involved in completing a schedule. In the next lesson we'll review how to post and print your completed schedule.
27.	End of Procedure.

Finalizing the schedule.

When your schedule is ready to be made available to your employees you'll post it. Once posted your employees can see when they work next. You can also print your schedule to post around your workplace.

After completing this lesson, you'll be able to:

- Post your schedule
- Print your schedule

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***

Narrated by Joel Harris
Senior eLearning Consultant
Toronto, Ontario
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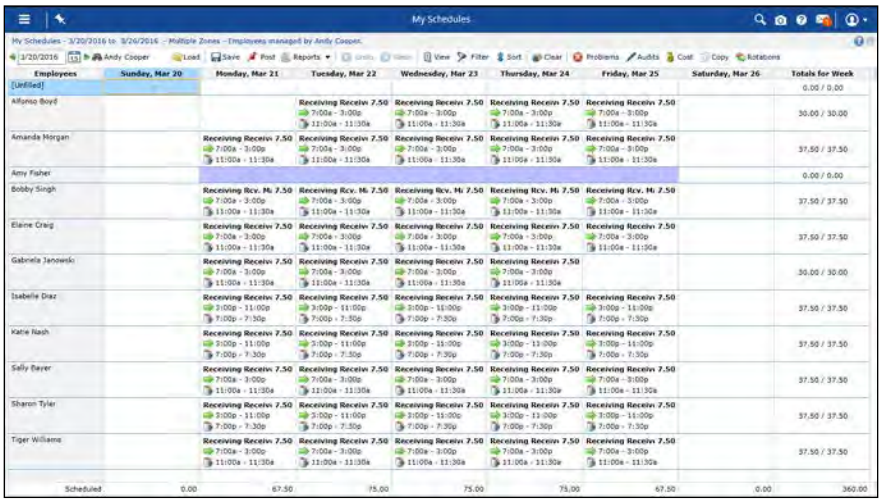
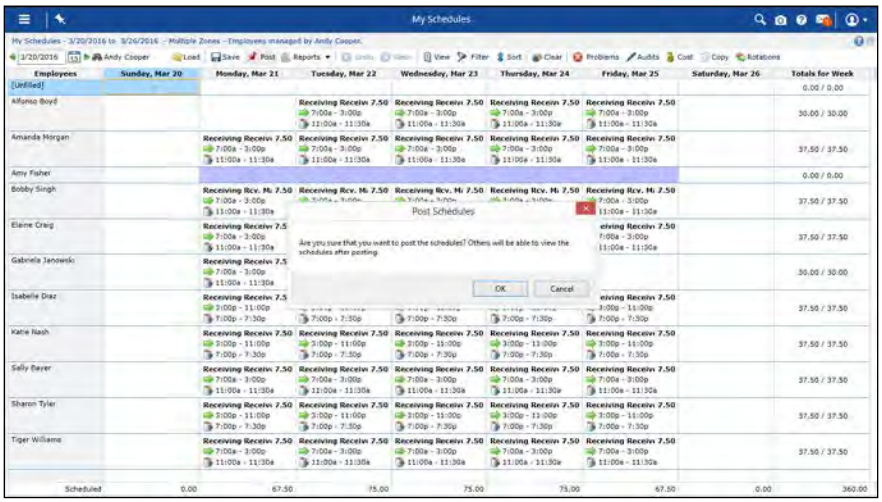
Procedure

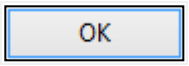
Scenario
Your schedule is complete. Post it for your employees and print it out.

Step	Action
1.	Posting the schedule At some organizations your schedule won't be available to employees until it's posted. If you have the Post option available, you'll use it when you're finished working on your weekly schedule. When a schedule is posted your employees will be able to log into Dayforce and check when they're working during this week.

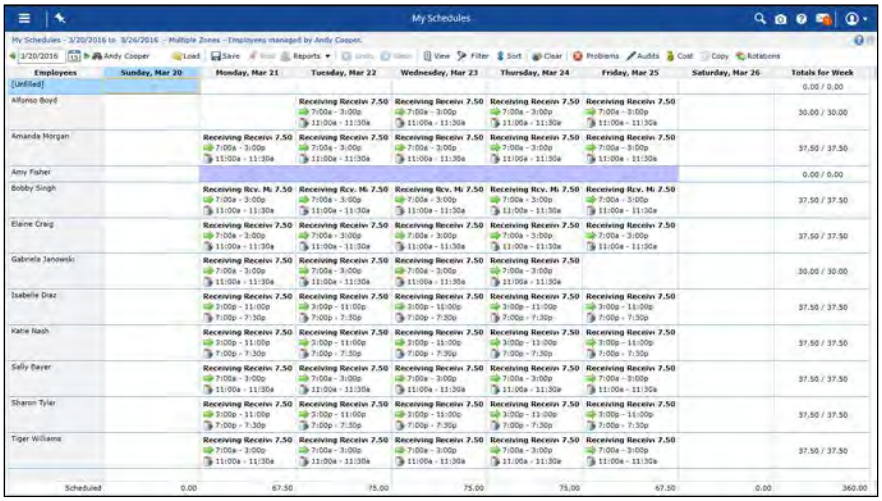


Step	Action
2.	Post the schedule Click the Post button.



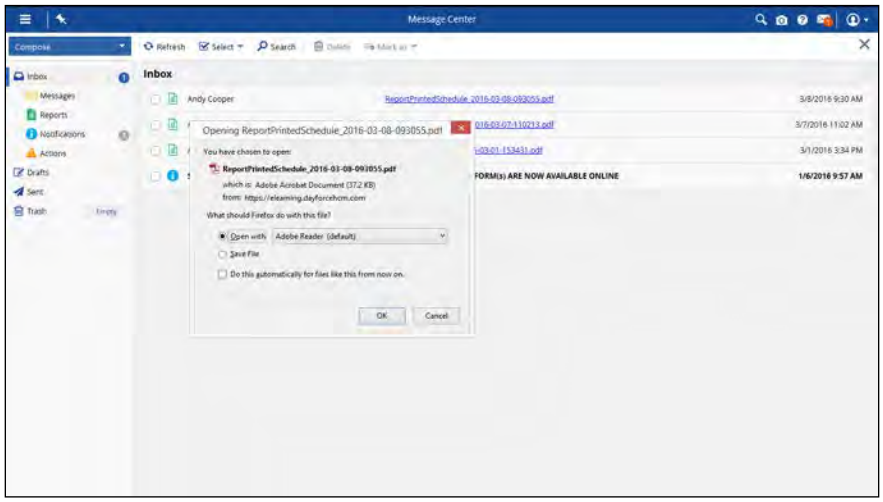
Step	Action
3.	Click the OK button. 

Step	Action
4.	Your schedule has been posted Your employees can now see when they're scheduling during this week. Keep in mind that a schedule can only be posted once. Any changes you make and save after a schedule has been posted will appear instantly.
5.	Printing the schedule You might print your schedule and post it around your workplace, in the lunchroom or on a bulletin board. In Dayforce you can print a copy of your schedule using the Printed Schedule Report.



Step	Action
6.	Print your schedule Click the Reports button. Reports
7.	Click the Printed Schedule Report button. Printed Schedule Report
8.	Customizing your printed schedule You can use the options in this dialog to control what information appears on your schedule and how it's presented. For now, leave all the options as they are but select meals and breaks.

Step	Action
9.	Click the Display Meals and Breaks option.
10.	Click the Run Report button. Run Report
11.	Click the OK button. OK
12.	Open your printed schedule When your schedule is ready you'll receive a notification in the lower right corner of your screen. You can then open the Message Center to access it. Click the Message Center button.
13.	Click the Report link. ReportPrintedSchedule_2016-03-08-093055.pdf



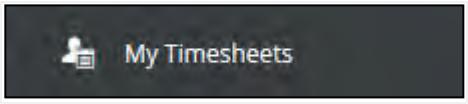
Step	Action
14.	Click the OK button. OK

Step	Action
15.	Your schedule opens in a document viewer The schedule you created in Dayforce has been exported into a printable format. At this point you could go ahead and print it out to be posted around your location. If you make any changes to your schedule in Dayforce you'll need to create a new printed schedule report.
16.	You've successfully finalized the schedule! Your schedule for the week has been posted and employees can check when they work next using Dayforce or by taking a look the printed schedule.
17.	End of Procedure.

Please refer to: http://mypathprod.dayforce.com/introducing-the-timesheet

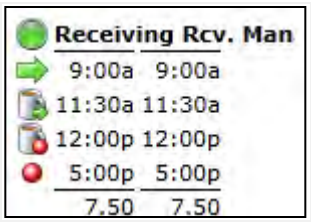
Procedure

Scenario
In this lesson, open up My Timesheets and review some of the important features you'll see and use on the screen.

Step	Action
1.	Start by opening My Timesheets This is where you'll review, edit, and authorize your employees' time. Click the Menu button.
2.	Click the My Timesheets button. 
3.	My Timesheets When an employee punches in and out for work or enters their time manually, it's reported here. Time can be entered using a timesheet, Dayforce touch, or web clock, among other devices. It's your responsibility as a manager to review these records on a regular basis because they impact how your employees are paid.
4.	My Timesheets layout When you open this screen you'll be shown the current week. My Timesheets looks similar to My Schedules. Your employees are listed along the left side of the screen and the days of the week are along the top. Each cell in this grid represents an employee's shift on a specific day of the week.
5.	Scheduled & Time Worked There are two columns in each cell. On the left is the shift that was added for the employee in My Schedules. On the right is their actual time worked. If the two times don't line up, you'll need to investigate the discrepancy and, if required, resolve the problem.
6.	Totals for the week In the Total column we see two sets of numbers. On the left is their total time scheduled excluding unpaid meals and breaks. On the right is their total number of hours actually worked for the week. In this example we see Alfonso is scheduled for 37.50 hours this week and has worked 7.50 so far.

Step	Action
7.	Timesheet icons There's a number of icons you'll see on the timesheet. They each represent different important pieces of information about an employee's shift. Let's review some of the icons you'll frequently see.
8.	Green light A green light means the shift was worked as scheduled. The employee will be paid as scheduled and all you might have to do is authorize it at the end of the week.
9.	Green light with an arrow A green light with an arrow means a shift is in progress and, at the moment, there aren't any conflicts between the employee's scheduled shift and punches.
10.	Red light A red light means an employee was scheduled but didn't work. You'll need to investigate if this employee simply forgot to punch or didn't show up to work at all. Because the timesheet impacts how they're paid it's important that no-show shifts are investigated and, if applicable, resolved.
11.	Yellow light A yellow light represents a shift that was worked but wasn't scheduled.
12.	Errors Errors are shifts with missing punches. They are identified with a Red X in their top left corner and beside the punch that is causing the error. In this example Alfonso has a missing out punch on Monday which is causing an error. You'll need to investigate and resolve errors as they often prevent employees from being paid for the shift.
13.	Warnings Warnings are shifts with early or late punches. They're represented with a yellow hazard icon. Unlike errors they don't have to be resolved for employees to be paid, however, they can impact pay if an employee is late or early by a specific amount. This varies from organization to organization.
14.	Blue icon Blue icons represent shifts in the future that haven't happened yet. In this example it's Wednesday and, therefore, shifts on Thursday and Friday are blue.

Step	Action
15.	Working with the timesheet There are four actions you'll regularly perform on the timesheet to make sure your employees' time records are accurate: 1. Updating punches 2. Entering pay adjustments 3. Recording transfers 4. Authorizing time
16.	Updating punches You can update employee punches. You might, for example, have employees that punch in late due to factors outside of their control. Maybe you asked them to run an errand for you before clocking in or there was a line up at the clock. When this happens you can manually update their punches to match the schedule so they are paid appropriately. In this example we see Gabriela punched in 15 minutes late because you were speaking with her before clocking in. You would update her punch to 9AM here.
17.	Entering pay adjustments Pay adjustments let you adjust time and attendances records to account for a variety of situations. For example, if an employee should be paid at a higher rate or bonus for their shift you would use a premium pay adjustment. They can also be used to account for unexplained absences. Here we see Amanda has a sick pay adjustment for Tuesday. Although she didn't work this shift this pay adjustment accounts for her absence and ensures she will receive sick pay. If this pay adjustment wasn't entered she wouldn't otherwise be compensated.
18.	Recording transfers If an employee worked multiple jobs or projects during a single shift you can document this by recording a transfer. It's important that transfers are entered on the timesheet because jobs and projects are often paid at different rates. A blue arrow icon lets you know a transfer has been entered.
19.	Authorizing shifts If you're required to authorize shifts you'll find the Authorize button in the toolbar. Authorizing a shift confirms you've reviewed the hours worked and they're ready to be processed by payroll. It's important to carefully review any shift that doesn't line up with the schedule to make sure all time and attendance records are correct. If they aren't correct, there's a risk employees won't be paid properly. Once authorized, a checkmark icon will display next to the shift.

Step	Action
20.	Viewing pay You can view how shifts on the timesheet impact an employee's pay in real-time using the View Pay panel. If you edit a punch, add a pay adjustment, or record a transfer you can immediately check how it impacts the employee's compensation in the View Pay panel. Go ahead and check Bobby's pay for the week.
21.	Select Bobby's Monday shift To view an employee's pay for the week you'll first select a shift for the employee you want to review and then open the View Pay panel. Click the Shift pane. 
22.	Open the View Pay panel This is where you can view how an employee's timesheet will impact their compensation for the week or a specific day. Click the Pay button.
23.	View Pay panel In the View Pay panel you can see the same figures that will appear on an employee's earning statement once payroll processes his time worked for this pay period. Use the Pay panel to preview how your changes to the timesheet will impact an employee's compensation. It's a valuable tool to understand the importance of reviewing and revising records in My Timesheets.
24.	Timesheets in Dayforce Now that you've been introduced to timesheets in Dayforce you can review the next lessons and begin to learn how to use all the tools and features available in this screen.
25.	End of Procedure.

Finding and correcting timesheet problems.

My Timesheets provides you with a summary of your employee's time and attendance records. For each of your employees, Dayforce tracks and reports when they worked and lists these times next to when they were scheduled. You can compare these two sets of times, make adjustments, correct inaccuracies, and enter missing time. The application graphically highlights any problems or exceptions.

In this lesson, you'll learn to how to read weekly time and attendance records, the meaning of different icons used to label those records, and how to filter for and correct a record for an employee who worked his shift but didn't clock in or out.

By the end of this lesson, you'll be able to:

- Check for problems on the timesheet using filters
- Resolve problems on the timesheet

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Joel Harris
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Toronto, Ontario
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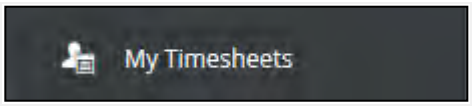
Procedure

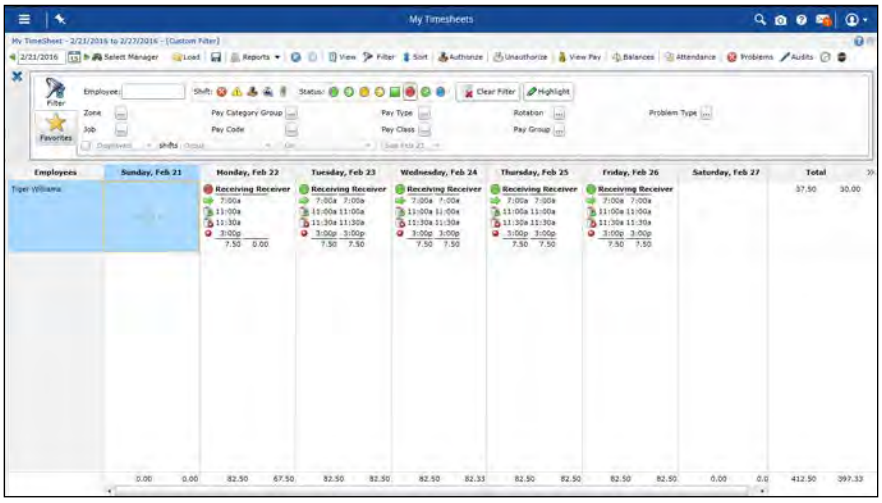
Scenario
Your employee Tiger Williams worked his shift but didn't clock in or out.

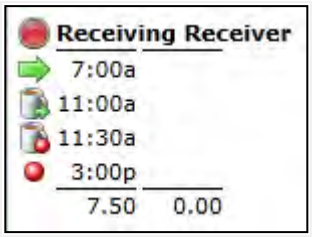
Filter the timesheet for problems and fix his missing punches.

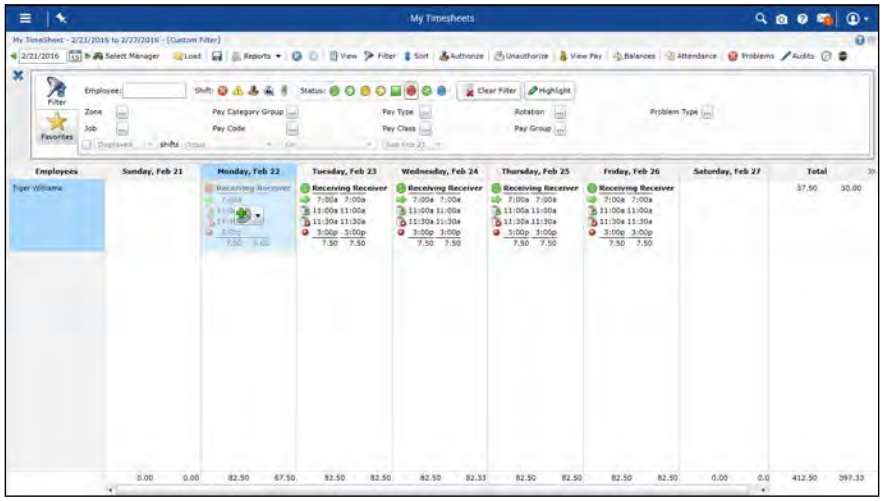
Step	Action
1.	Load the timesheet My Timesheets provides you with a summary of your employee's time and attendance records. Click the Menu button.
2.	Click the My Timesheets button. 
3.	Timesheet icons There's a number of icons you'll see on the timesheet: Green light: Shift was scheduled and has been worked Green light with arrow: Shift was scheduled and is being worked Green light with checkmark: Shift was scheduled, was not worked, and has an adjustment Green square: Shift is paid to schedule Yellow light: Shift was not scheduled and has been worked Yellow light with arrow: Shift was not scheduled and is being worked Red light: Shift was scheduled and was not worked Blue light: Shift is scheduled to be worked

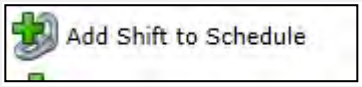
Step	Action
4.	Filter for timesheet problems and no-show shifts You can use the filter instead to find different types of problems associated with your timesheet. Click the Filter button.
5.	First, filter for errors Errors are shifts with missing punches. Errors must be corrected. Click the Errors button.
6.	You've successfully filtered for error punches When you select a filter, it will be applied immediately. This hides any employees that do not match your selection.
7.	Clear the error filter Before applying a new filter, you should clear your old filter. Click the Errors button.
8.	Next, filter for punch exceptions Punch exceptions or warnings are shifts with early or late punches. Warnings might be useful for you to know about, but typically do not have to be corrected. Click the Punch Exceptions button.
9.	You've successfully filtered for punch exceptions In this example we see a punch exception where an employee happened to punch in 10 minutes late for their scheduled shift.

Step	Action
10.	Clear the punch exceptions filter Click the Punch Exceptions button.
11.	Filter for "no-show" shifts Now that you're familiar with how filters work, go ahead and fix Tiger Williams' missing punches. Red icons indicate shifts that were scheduled, but not worked. Click the Scheduled Not Worked button.

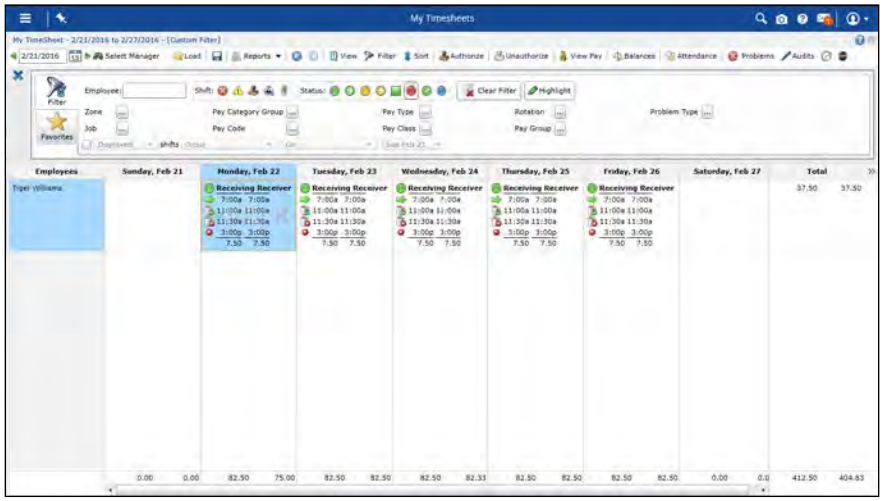


Step	Action
12.	Add clock punches to Tiger's shift Tiger was scheduled to work on Monday but didn't punch in or out for the day. You have already spoken with Tiger and he told you he left his swipe card at home. To correct his record, add clock punches to his shift. Click the Shift. 

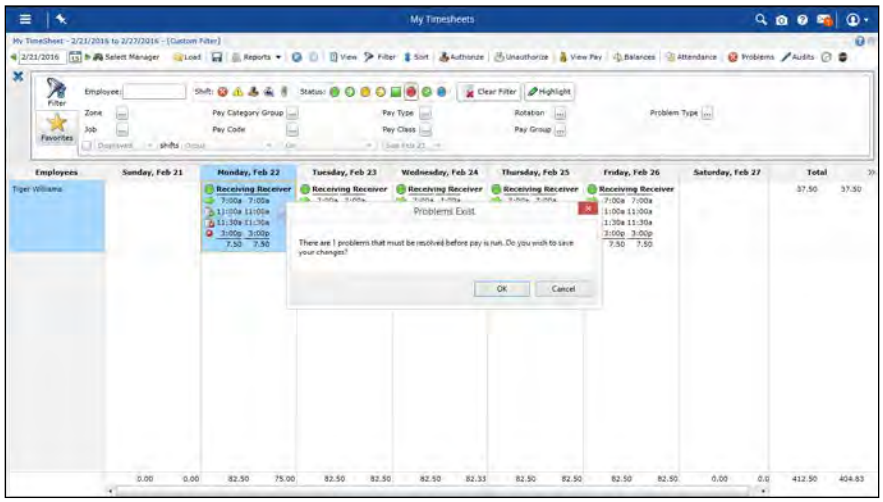


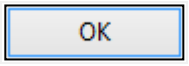
Step	Action
13.	Click the Add Shift Drop-Down button.
14.	Click the Add Shift to Schedule button. 

Step	Action
15.	Save the punches When entering missing time, Dayforce will automatically add the scheduled punches into the punch time fields. In this example, Tiger worked his scheduled hours as shown here, however, you could edit these times if necessary. Click the Close button.
16.	You've successfully corrected a "no-show" shift Tiger's punches are now recorded in the system and he'll be compensated for his Monday shift. Go ahead and save your changes.



Step	Action
17.	Save your changes Click the Save button.



Step	Action
18.	Confirm you're aware of remaining errors When you're working on your timesheets you'll resolve all errors before saving, however, for the purposes of this lesson, we'll go ahead and save anyways. Click the OK button. 
19.	End of Procedure.

Authorizing a timesheet.

You can load your employees' time and attendance records from the My Timesheets section.

Dayforce HCM displays the records for your entire team — all the employees who work at your location, whether that is a whole store or a zone or department — for the selected period. Once the timesheet is accurate it must be authorized. Authorizing the timesheet is a signal that the hours have been reviewed for accuracy. It also lets the payroll department know that the timesheets have been reviewed for accuracy and are ready to be transmitted to the HR/Payroll system.

After completing this lesson, you'll be able to:

- Authorize a timesheet by a single shift, day, week, or selected shifts.

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***

Narrated by Charlene Fernandes
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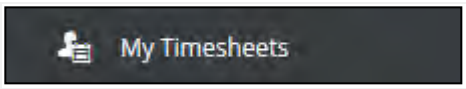
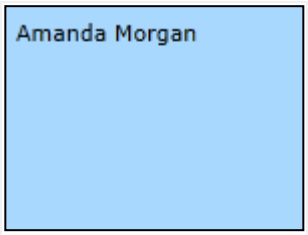
charlene.fernandes@ceridian.com

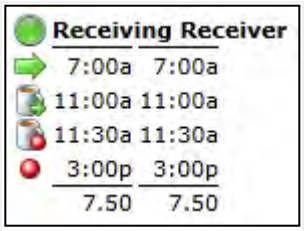
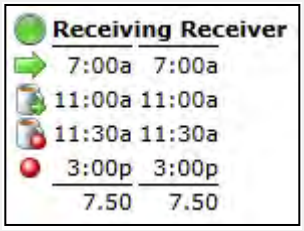
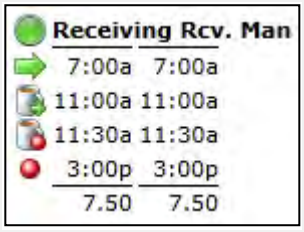
Procedure

Scenario
In this lesson you'll discover how to identify unauthorized shifts and learn a few ways to select shifts on that timesheet that will save you a lot of time.

Step	Action
1.	Open My Timesheets This is where you can you can select shifts to be authorized. Click the Menu button.
2.	Click the My Timesheets button. 

Step	Action
3.	The My Timesheets screen The timesheet lists your employees against the days of the week, creating a grid, so that each cell represents a single time and attendance record for a specific employee and date. With this view, you can quickly scan your employee's records for the week. Within each cell, several pieces of information are displayed. Typically, you will see a set of times, such as '7:00a-3:00p' and a couple of icons. The times either represent when the employee worked on that day, or, if the employee was absent or the date is in the future, they represent the employee's scheduled shift on that day.
4.	Authorize Timesheets for previous week Once you've reviewed that the worked shifts on the timesheet accurately represent when your employees worked, and the pay details are correct, you can authorize them to confirm that you have reviewed the records. Click the Previous week button.
5.	Begin by filtering for unauthorized shifts After applying a filter, the timesheet will only display shifts that have yet to be authorized. Click the Filter button.
6.	Click the Unauthorized records button.
7.	Your timesheet is now filtered! Only unauthorized shifts are now displayed on your timesheet and you can begin reviewing and authorizing them. Let's cover a couple different ways you can select shifts to be authorized.

Step	Action
8.	First, authorize a single shift You can authorize a single shift by selecting it and clicking Authorize in the toolbar. Click the Shift pane.
9.	Click the Authorize button.
10.	You've successfully authorized a single shift! You can tell this shift has been authorized as a Checkmark icon appears between the timesheet icon and position name.
11.	Next, authorize all an employee's shifts Click an employee's name in the Employees column select and authorize all of their records for the week. Click the Employee pane. 
12.	Click the Authorize button.
13.	Authorize all the Monday shifts You can click any date to select every shift in that week. Click the Day pane.

Step	Action
14.	Click the Authorize button.
15.	Select and authorize multiple shifts at once You can select multiple shifts at once by holding down CTRL on your keyboard and selecting each shift that needs to be authorized. Once selected, you can release CTRL and click Authorize. Click the Shift pane. 
16.	Press the [Ctrl] key and click the Shift. 
17.	Press the [Ctrl] key and click the Shift. 
18.	Click the Authorize button.

Step	Action
19.	You've successfully reviewed four ways to authorize shifts! On My Timesheets you're able to: -Authorize a single shift -Authorize all of an employee's shifts -Authorize all shifts worked on a day of the week -Authorize multiple shifts Another way to select multiple shifts at once is dragging and dropping. Proceed to save your changes and conclude this lesson.
20.	Save the authorizations Click the Save button.
21.	You've successfully authorized the shifts on the timesheet When you're reviewing and authorizing your timesheets use whichever method is most efficient for you.
22.	End of Procedure.

You allowed a late start or early departure.

Let's say it's a slow morning and you decide to call up one of your employees and give them the option of showing up 30 minutes later and they agree. That causes a bit of a problem because Dayforce doesn't know about your phone call and will think they're showing up late.

Dayforce uses pay codes to categorize time so it'll assign a late pay code to the first 30 minutes of their shift and a work pay code to the remaining time. Certain pay codes, like the late pay code, will cause the shift to appear in the Problems panel. That's because Dayforce wants you to know that something happened so that you can either acknowledge the problem or correct it. In our example, we want to correct it to indicate that the late arrival was ok .

By the end of this lesson, you'll be able to:

- Navigating to an exception on the timesheet

- Approving an exception on the timesheet

To review the demo:

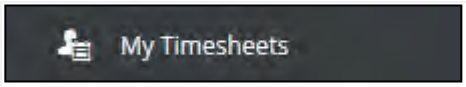
1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

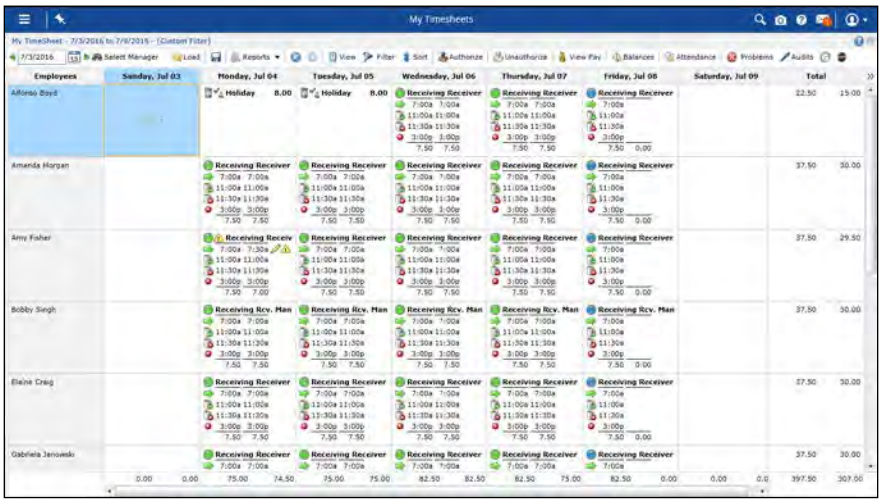
Narrated by Aaron Lee
eLearning Developer
Toronto, Ontario
aaron.lee@ceridian.com

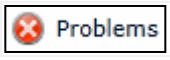
Procedure

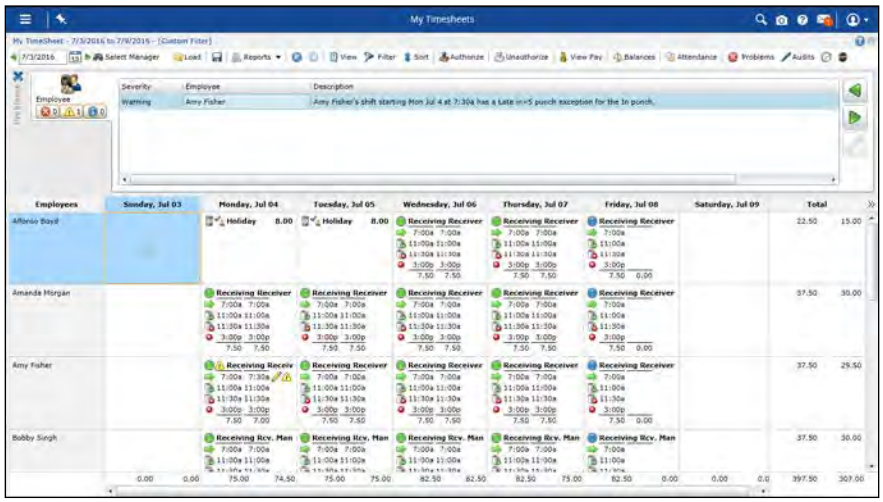
Scenario
In this example, you allowed Amy Fisher to punch in late for a shift and now you want to update the timesheet to note that you approved the exception.

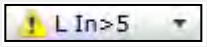
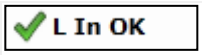
Step	Action
1.	Open My Timesheets This is where you can allow a late start or an early departure Click the Menu button.

Step	Action
2.	Click the My Timesheets button. 



Step	Action
3.	Open the Problems panel This is where Dayforce will list any warnings and errors associated with the loaded timesheet. Click the Problems button. 
4.	Navigate to Amy's exception on the timesheet To navigate through the list of problems and exceptions, you simply click the item in the list that you want to find, and then click the green forward arrow. Select the list item for Amy Fisher.



Step	Action
5.	Click the Next button.
6.	Resolve the exception The shift that contains the exception to Amy's record is selected. Click the Edit button.
7.	The L-In>5 code (i.e. Came in more than 5 minutes late) indicates that Amy punched in late. Because you approved her late start, you want to update the record to reflect that approval. Click the Drop-down menu. 
8.	Keep in mind that you'll likely see different pay codes at your organization. Click the L in OK list item. 
9.	The Problems panel is now clear! Notice that as soon as you resolved the exception it was removed from the Problems panel

Step	Action
10.	Add a comment to the timesheet Click in the Comment field. Enter Comment Here
11.	Enter the desired information into the Comment field. Enter "Approved late start".
12.	Close the shift then save the timesheet Click the Close button.
13.	Save your changes Click the Save button.
14.	End of Procedure.

Employee called in sick.

Pay adjustments are another method you can use to correct your employee's time and attendance records. Generally pay adjustments are used to cover justified absences such as sick leave or vacation time.

By the end of this lesson, you'll be able to:

- Filter the timesheet for scheduled, unworked shifts
- Make a pay adjustment

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Aaron Lee
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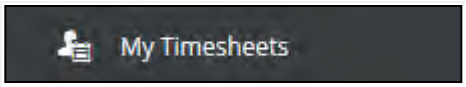
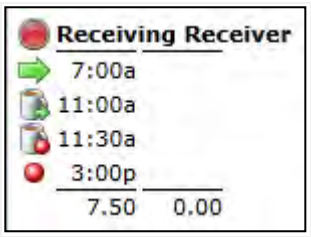
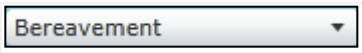
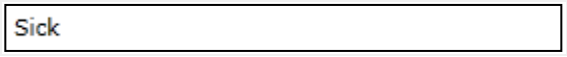
Toronto, Ontario
aaron.lee@ceridian.com

Procedure

Scenario
Your employee, Amanda Morgan, called in sick for one of her regularly scheduled shifts.

Enter a pay adjustment for this shift to ensure Amanda receives her sick pay.

Step	Action
1.	Open My Timesheets This is where you can enter a pay adjustment to a shift. Click the Menu button.
2.	Click the My Timesheets button. 

Step	Action
3.	First, filter the timesheet for shifts scheduled but not worked Filtering the timesheet makes finding the shift you're looking for much easier. Click the Filter button.
4.	Click the Scheduled Not Worked button.
5.	Next, add a pay adjustment for 7.5 hours of sick time to Amanda's unworked shift Amanda Morgan didn't work her scheduled shift on Monday. Add a sick pay adjustment to that day so she'll be paid for the shift and the absence will be accounted for on the timesheet. Click the Shift pane. 
6.	Click the Edit shift Drop-Down button.
7.	Click the Add New Pay Adjutsment button.
8.	Select the pay adjustment type This controls if, and how, the employee will be paid for the absence. Click the Pay Adjustment type menu. 
9.	Click the Sick list item. 
10.	Click the Close button.

Step	Action
11.	Enter the number of Sick time hours Click in the Amount field. 0.00
12.	Enter the desired information into the Amount field. Enter "7.50".
13.	Close the adjustment then save the timesheet Click the Close button.
14.	Save your changes Click the Save button. Save
15.	You've successfully added a pay adjustment on the timesheet! Amanda will now be paid for her sick time on Monday. Although her shift was unworked she'll be compensated according to your company's sick policy.
16.	End of Procedure.

Recording transfers.

Some employees are qualified to work different positions and in different departments at different pay rates.

These transfers are usually scheduled and employees are expected to register the transfer on a clock. If the employee changes positions without punching on a clock, you'll need to enter it in My Timesheets.

After completing this lesson, you'll be able to:

- Record a transfer

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Charlene Fernandes
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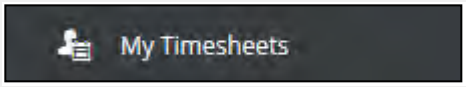
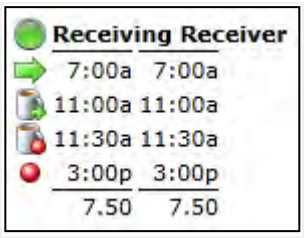
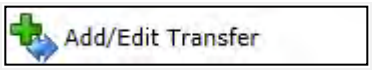
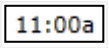
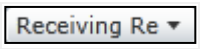
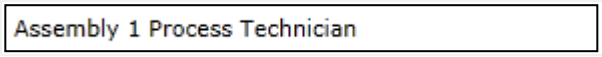
charlene.fernandes@ceridian.com

Procedure

Scenario
On Tuesday, Amy worked as a Receiving Receiver in the morning and as a Process Technician in the afternoon. Update her timesheet to reflect the transfer.

Step	Action
1.	Open My Timesheets This is where a transfer can be added and edited. Click the Menu button.
2.	Click the My Timesheets button. 

Step	Action
3.	Enter that Amy switched to the Process Technician position at 1PM on Tuesday Transfers are added from the Edit Shift drop-down menu. Click the Shift pane. 
4.	Click the Edit Drop-down pane.
5.	Click the Add/Edit Transfer button. 
6.	Add a transfer Add a transfer indicating that Amy worked as a Receiving Receiver in the morning and as a Process Technician in the afternoon. Click the Add button.
7.	Enter the time this transfer occurred Click in the Time field. 
8.	Enter the desired information into the Time field. Enter "1p".
9.	Change the position Amy worked as Process Technician in the afternoon. Click the Position menu. 
10.	Click the Assembly 1 Process Technician list item. 

Step	Action
11.	Click the Close button.
12.	Close the window and save your changes Click the Close button.
13.	Save your changes Click the Save button.
14.	You've successfully recorded a transfer! Amy's timesheet now accurately reflects her Tuesday shift. She worked as a Receiving Receiver in the morning and as a Process Technician in the afternoon. She'll be properly compensated for this shift.
15.	End of Procedure.

Authorizing and approving a pay period.

You'll find and correct timesheet problems during the course of the pay period, but before the period is closed and paid, you'll need to acknowledge that all the timesheets are correct by approving the pay period.

With Dayforce HCM, if an employee punches in and out on time for their schedule shift, those punches will be listed on the timesheet with a green light indicator. If an employee's punches don't line up with their schedule, you'll need to resolve these exceptions. At the end of the pay period, you'll approve the period as a whole. However, some organizations require the extra step of going to the timesheet and manually authorizing all records. If your organization requires the use of the Authorize button on My Timesheets, this lesson is for you. Otherwise, advance to the next lesson: Approving a pay period.

After completing this lesson, you'll be able to:

- Authorize a timesheet
- Review the Pay Approve Checklist
- Approve a pay period

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Charlene Fernandes
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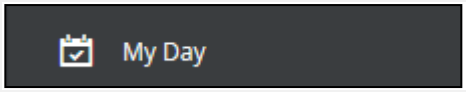
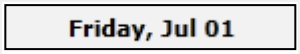
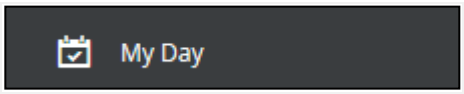
Procedure

Scenario
In this lesson you'll review how to authorize a timesheet and learn how to approve a pay period.

Step	Action
1.	Review timesheets on a daily basis Leading up to the pay period, you'll log into the timesheet daily, or as necessary, to review timesheets and employee clock punches. This way, on the final day of the pay period, you'll only need to review the final day's timesheet entries.

Step	Action
2.	Open My Day This is where you can use the Pay Approve Checklist as your starting point for reviewing and authorizing timesheet records. Click the Menu button.
3.	Click the My Day button. 
4.	First, review and authorize the remaining Friday records for the highlighted pay period You can use the Pay Approve Checklist as your starting point for reviewing and authorizing timesheet records. In this example, you've been reviewing records on a daily basis. Display the timesheet to review and authorize records for the remaining day. Click the Edit button.
5.	Authorize Friday's shifts In this example, the timesheet records on Friday are accurate. Confirm this by authorizing all of Friday's records. To authorize all the records for a day, select the day's column header then click the Authorize button. You can also authorize individual records by selecting a single shift. Click the Friday column header. 
6.	Click the Authorize button.
7.	You've successfully authorized the remaining timesheet records The checkmark indicates that the shift is authorized.

Step	Action
8.	Save your changes Click the object.
9.	Next, approve the pay period Now that you've authorized the records on the timesheet, you'll return to My Day approve the pay period as a whole. Click the Menu button.
10.	Click the My Day button. 
11.	The Pay Approve Checklist: Statuses The Pay Approve Checklist displays details for each pay period. The first column provides the status. In this example, the red circle indicates that the pay period is overdue, while the blue circle indicates that the last pay period isn't due yet. Its due date is listed in the Due Date column.
12.	The Pay Approve Checklist: Problems and Punch Issues Before you approve a pay period, it's important to ensure that all problems and punch issues are resolved. In these two columns you can see that no problems or punch issues are listed. If there were, you could click the pencil icon in the Edit column to open the timesheet for that pay period and make any necessary corrections.
13.	Approve the pay period and then save your changes Click the Approve option.
14.	Click the Save button.
15.	You've successfully authorized and approved the pay period The status for the pay period is updated to a green checkmark, which indicates that the pay records for this pay period have been approved.

Step	Action
16.	End of Procedure.

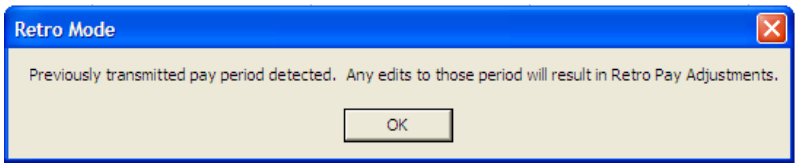
Making a retroactive adjustment.

Any change you make to a timesheet is considered retroactive if the pay period has already been committed for pay. In that sense, there's no special method of making a retroactive change. Just navigate to the appropriate week in My Timesheets and make a change as you normally would.

The Timesheet is locked. What do I do?
The Payroll Administrator locks down the timesheet in order to commit pay. This allows them to run reports and prepare the pay period without fear of other users making last minute changes. If you try to make a change and the timesheet is still locked, contact your Payroll Administrator and ask them to unlock it.

What happens if my changes affect the employee's pay?
Pay will be recalculated as though the change had been made correctly in the first place. This means that taxes, overtime, and all other rules will be recalculated. Any change in pay will be automatically reflected in the employee's next paycheck.

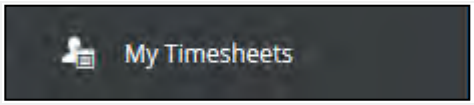
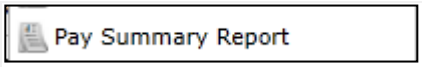
How will I know if my changes are retroactive?
When you load a timesheet that has already been committed, you'll see the Retro Mode message.



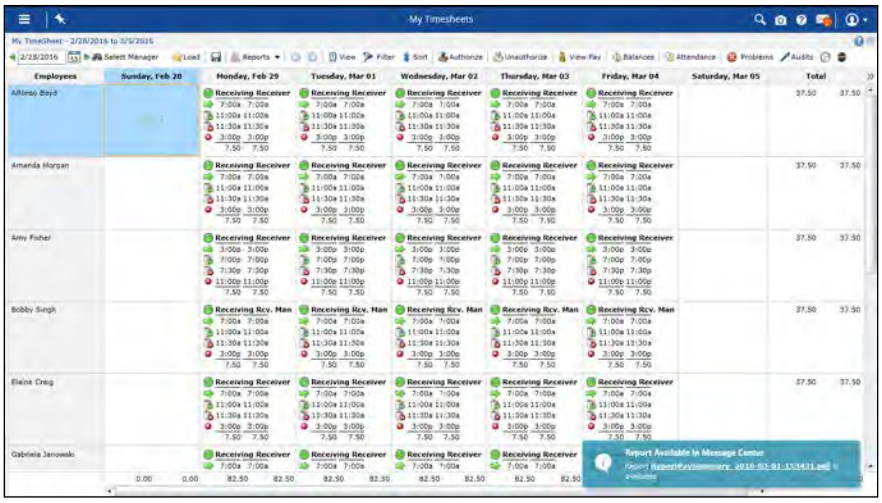
Please refer to: https://mypathprod.dayforce.com/running-a-report

Procedure

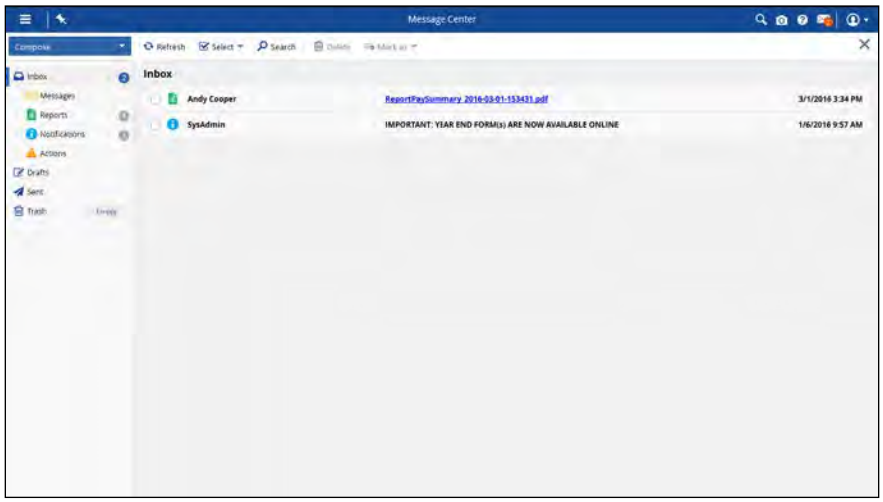
Scenario
Create and review a Pay Summary report.

Step	Action
1.	Run the Pay Summary Report You'll find the Pay Summary Report in My Timesheets. Each screen in Dayforce contain different reports. Click the Menu button.
2.	Click the My Timesheets button. 
3.	Open the Reports list Click the Reports button.
4.	Click the Pay Summary Report button. 
5.	Report parameters You can use the dialog that opens when you select a report to control the information it contains and how it appears. In this example you'll update the report to 'Include Meals and Breaks'.

Step	Action
6.	Click the Include Meals and Breaks option.
7.	Scroll down.
8.	Create your report Click the Run Report button. Run Report
9.	Your report is being created The report will be generated as you continue working. When it's ready, it'll appear as a new item in your inbox. Click the OK button. OK



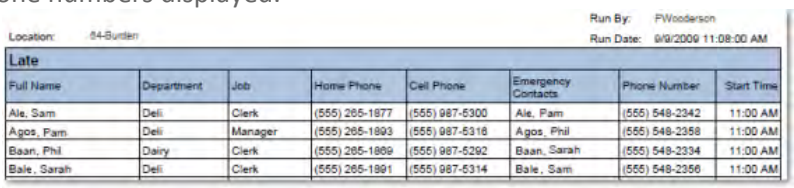
Step	Action
10.	Click the Message Center button.



Step	Action
11.	Open the report You can open the report as a PDF. Click the Report link. ReportPaySummary 2016-03-01-153431.pdf
12.	You've successfully created a Pay Summary Report! You can proceed to print this report, save it to your computer, or email it to a colleague. This is the same process you'll follow for generating all reports in Dayforce HCM.
13.	End of Procedure.

Attendance Roll Call Report.

The Attendance Roll Call Report generates a list of your employees scheduled to work today, with their phone numbers displayed.



Location: 84-Burdin

Run By: FWoodarson
Run Date: 9/9/2009 11:08:00 AM

Late

Full Name	Department	Job	Home Phone	Cell Phone	Emergency Contacts	Phone Number	Start Time
Ale, Sam	Deli	Clerk	(555) 265-1877	(555) 987-5300	Ale, Pam	(555) 548-2342	11:00 AM
Agos, Pam	Deli	Manager	(555) 265-1893	(555) 987-5316	Agos, Phil	(555) 548-2358	11:00 AM
Baan, Phil	Dairy	Clerk	(555) 265-1869	(555) 987-5292	Baan, Sarah	(555) 548-2334	11:00 AM
Bale, Sarah	Deli	Clerk	(555) 265-1891	(555) 987-5314	Bale, Sam	(555) 548-2356	11:00 AM

It lists the contact information for each employee scheduled to start earlier than the time you run the report. So, if you run the report at noon, it will not list any employees scheduled to start in the afternoon.

Department Hours Pay Summary Report.

The Department Hours Pay Summary Report summarizes the labor cost billed against each department, in both hours and wages; it also distinguishes between total hours and paid hours.

ABC Company **Hours by Department Pay Summary Report** **Dayforce**

Date Range: 1/1/2011 - 11/6/2011
Location: 12-Apple Rd
Options: Show Department Summary, Show Cross Reference Codes
Pay Type: Hourly(Exempt), Hourly(Non-Exempt), Salaried(Exempt), Salaried(Non-Exempt)
Pay Category: All
Department: All

Run By: Tim.Finn
Run Date: 11/3/2011 2:35:53 PM

		Hours	Paid Hours	Wages
Accounting				
	Regular	740.81	740.81	18,715.34
	Unpaid	17.33	6.83	773.58
	Daily OT	39.50	39.50	1,692.63
	Total	797.65	787.15	21,181.56

You can select which departments, pay types, and pay categories to display on the report. For example, you can report just on overtime, for regular time in a particular department, or just the salaried employees in your departments.

Employee Comments Report.

The Comments Report displays any comments employees and managers have made on timesheets within the specified period, as well as pay details from the day with the comments.

Comments Report **Dayforce**

Date Range: 4/15/2012 - 4/21/2012
Location: 103 - Nilbog

Run By: jdrozd
Run Date: 5/9/2012 3:12:06 PM

Janele Buller **6957** **Wed,Apr 18** **Manager Authorized** No **Employee Authorized** No

In	Out	Organization	Department	Job	Pay Category	Pay Code	Hours	Premium	Rate	Amount
1:00 pm	6:00 pm	103 - Nilbog	Store	Clerk	Reg	Work	5.00	0.00	10.00	50.00
					Total:		**5.00**	**0.00**	**10.00**	**50.00**

Manager Comments No problem
Employee Comments Left early for a doctor's appointment

		Pay Category	Pay Code	Department	Job	Hours	Premium	Rate	Amount
		Reg	Work	Store	Clerk	5.00	0.00	10.00	50.00
Janele Buller	**6957**			**Total:**		**5.00**	**0.00**	**10.00**	**50.00**

Employee Punch Report.

Run the Employee Punch Report for a summary of employee punches and worked time; the report lists who punched in and out for work, and when, during the selected time period.

Employee Punch Report — **Dayforce**

Date Range: 4/12/2010 - 4/18/2010 — Run By: Stephane.Lo
Location: 16-Ranten — Run Date: 5/13/2010 4:16:17 PM

David Gallo	111384	Start Shift	Start Meal	End Meal	End Shift	Total Hours	Paid Hours	Exceptions
Thu,Apr 15		5:00 pm			9:00 pm	4.00	4.00	
Sat,Apr 17		1:00 pm	2:00 pm	2:30 pm	7:56 pm	6.93	6.43	
						10.93	10.43	
Christine Talbot	**101429**	**Start Shift**	**Start Meal**	**End Meal**	**End Shift**	**Total Hours**	**Paid Hours**	**Exceptions**
Tue,Apr 13		4:00 pm			8:01 pm	4.02	4.02	
						4.02	4.02	

Employee Transfer Report.

The Employee Transfer Report displays a list of the employees who have recorded 'location transfers' in their time and attendance records. Employees record transfers when they work in a location other than their home location, in order to record their hours against the correct location.

The report displays employees transferring out of your location for a shift and employees from other locations transferring into yours for a shift.

Employee Transfer Report — **Dayforce**

Date Range: 1/25/2010 - 2/7/2010 — Run Date: 3/4/2010 12:02:29 PM

Transfers In

Alex Dire	**49172**	**From: 28-Ryton**				
Date	Department	Pay Code	Start Shift	End Shift	Hours	Amount
1/30/2010	CS	WRK	5:30 am	5:30 pm	12.00	220.59
Mark Del	**114025**	**From: 28-Ryton**				
Date	Department	Pay Code	Start Shift	End Shift	Hours	Amount
1/30/2010	CS	WRK	5:30 am	5:30 pm	12.00	219.61
Fran Falen	**406728**	**From: 96-Fairhill**				
Date	Department	Pay Code	Start Shift	End Shift	Hours	Amount
1/26/2010	CS	WRK	6:00 am	2:21 pm	8.35	101.01
1/27/2010	CS	WRK	6:00 am	2:19 pm	8.32	101.23
2/2/2010	CS	WRK	6:00 am	2:33 pm	8.55	104.03
2/3/2010	CS	WRK	6:00 am	2:36 pm	8.60	104.03

You can select to run the report on every department in your location, or just on a specific department, such as customer service, to review which employees were transferred in and out of it.

Hours by Department Report.

The Hours by Department Report summarizes the labor cost billed against each department, in both hours and wages.

Hours by Department Report — **Dayforce**

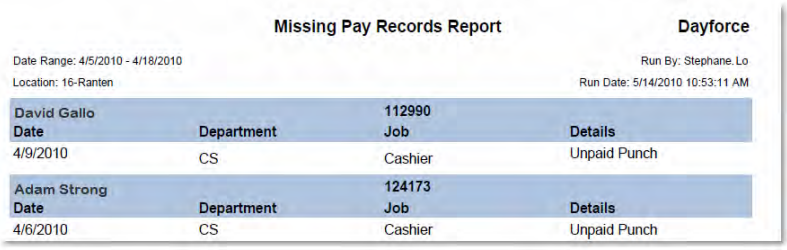
Date Range: 2/8/2010 - 2/21/2010 — Run Date: 3/3/2010 2:55:33 PM

		Normal	Other	Wages
Admin				
Reg		86.97	0.00	1,363.50
	Total	86.97	0.00	1,363.50
CS				
Reg		247.27	0.00	3,304.07
Salary Vacation		0.00	76.80	1,195.07
Stat Holiday		0.00	8.00	139.16
Training		10.68	0.00	99.98
	Total	257.95	84.80	4,738.28

You can select which departments, pay types, and pay categories to display on the report. For example, you can report just on overtime, for regular time in a particular department, or just the salaried employees in your departments.

Missing Pay Records Report.

Run the Missing Pay Records Report to review a list of employees who are potentially missing pay; the application reports on any employee who recorded worked time by punching in and out for work, or who should be automatically paid by the application for their scheduled time (typically salaried employees), and were not paid. It also checks for approved pay adjustments, like commission pay outs, bonuses, or other premiums, that an employee earned but for some reason was not paid for.



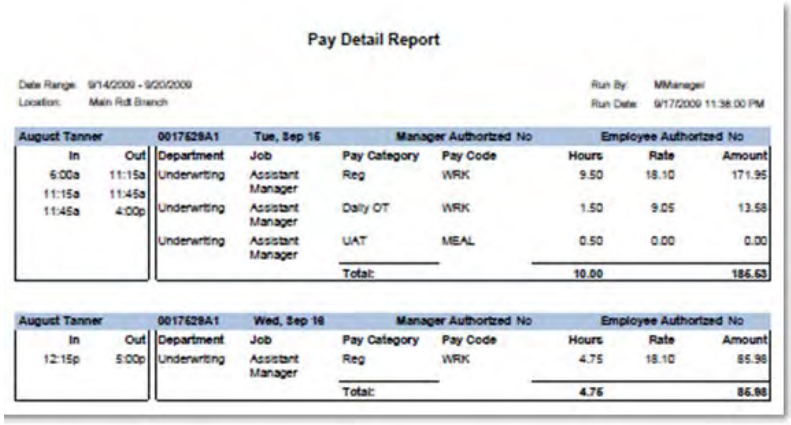
Missing Pay Records Report — **Dayforce**

Date Range: 4/5/2010 - 4/18/2010 — Run By: Stephane.Lo
Location: 16-Ranten — Run Date: 5/14/2010 10:53:11 AM

David Gallo		112990	
Date	**Department**	**Job**	**Details**
4/9/2010	CS	Cashier	Unpaid Punch
Adam Strong		**124173**	
Date	**Department**	**Job**	**Details**
4/6/2010	CS	Cashier	Unpaid Punch

Pay Detail Report.

The Pay Detail Report summarizes the pay details of your location's employees for a day, week, or date range you specify. It lists the amount of time employees work, recorded against different pay codes and categories, as well as the various pay rates they earn and how much they are paid each day.



Pay Detail Report

Date Range: 9/14/2009 - 9/20/2009 — Run By: MManager
Location: Main Rdl Branch — Run Date: 9/17/2009 11:38:00 PM

August Tanner		0017628A1	Tue, Sep 15		Manager Authorized No		Employee Authorized No	
In	Out	Department	Job	Pay Category	Pay Code	Hours	Rate	Amount
6:00a	11:15a	Underwriting	Assistant Manager	Reg	WRK	9.50	18.10	171.95
11:15a	11:45a							
11:45a	4:00p	Underwriting	Assistant Manager	Daily OT	WRK	1.50	9.05	13.58
		Underwriting	Assistant Manager	UAT	MEAL	0.50	0.00	0.00
				Total:		10.00		185.53

August Tanner		0017628A1	Wed, Sep 16		Manager Authorized No		Employee Authorized No	
In	Out	Department	Job	Pay Category	Pay Code	Hours	Rate	Amount
12:15p	5:00p	Underwriting	Assistant Manager	Reg	WRK	4.75	18.10	85.98
				Total:		4.75		85.98

Payroll Inactivity Report.

The Payroll Inactivity Report lists any employees with inactive payroll statuses and when they were last paid. It lists employees who are inactive for any reason, whether they are on a leave of absence, terminated, or inactive for some other reason.

Payroll Inactivity Report **Dayforce**

Date Range: 2/1/2010 - 3/3/2010

Run Date: 3/3/2010 5:21:28 PM

Number	Name	Last Pay Date
111079	Sarah Hawe	10/5/2009
112576	Thomas Sarde	10/12/2009
112534	Janet Shallo	10/17/2009

Pay Summary Report.

The Pay Summary Report displays the payroll data of your employees — how much employees earned in regular pay, overtime, or any other pay categories your organization tracks. It displays this information in wages and in the amount of hours employees worked in each pay category.

With the report you can display the employee's punch times, authorizations, and daily pay details, listing which pay categories and pay codes their worked time was recorded against. Depending on how you choose to group employees, the report displays different totals, including the Weekly Total (the number of hours for each employee), Job Total, Department Total, Zone Total, and Grand Total (the total for the entire location).

Pay Summary Report

Date Range: 9/14/2009 - 9/20/2009
Location: Main Rdt Branch
Run By: MManager
Run Date: 9/17/2009 11:47:00 PM

Employee							Actual			
Name	ID	Date	Department	Job	Pay Category	Pay Code	In	Out	Hours	Amount
Abby Worker	0018059A1	Mon, Sep 14	Finance	Branch Service	REG	WRK	8:00a	1:00p	5.00	108.20
					VAC	MEAL	1:00p	1:30p	0.50	0.00
					REG	WRK	1:30p	2:45p	1.25	27.05
		Mon, Sep 14	Total:						6.75	135.25
		Tue, Sep 15	Finance	Branch Service	REG	WRK	9:30a	1:15p	3.75	81.15
					VAC	MEAL	1:15p	1:45p	0.50	0.00
					REG	WRK	1:45p	5:30p	3.75	81.15
		Tue, Sep 15	Total:						8.00	162.30
		Wed, Sep 16	Finance	Branch Service	REG	WRK	9:00a	1:15p	4.25	91.97
					VAC	MEAL	1:15p	1:45p	0.50	0.00
					REG	WRK	1:45p	5:00p	3.25	70.33
		Wed, Sep 16	Total:						8.00	162.30
		Fri, Sep 18	Finance	Branch Service	REG	WRK	10:00a	2:45p	4.75	102.79
		Fri, Sep 18	Total:						4.75	102.79
Abby Worker			Total:						27.50	562.64

Projected Hours Report.

Run the Projected Hours Report to review a report on the number of hours employees are projected to work. This report is useful midweek to help determine how many employees are likely to work into overtime.

Projected Hours Report **Dayforce**

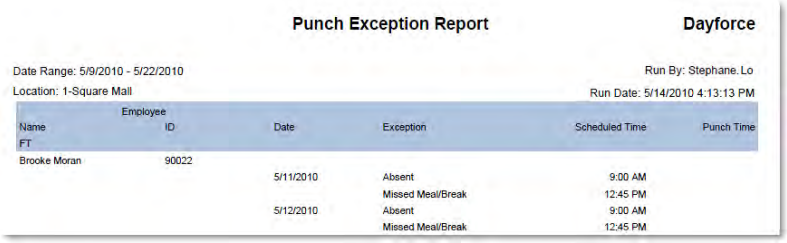
Date Range: 5/10/2010 - 5/16/2010
Location: 16-Ranten
Run By: Stephane.Lo
Run Date: 5/13/2010 5:09:06 PM

David Gallo	Clerk		Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
		Scheduled	10.00	0.00	10.00	10.00	10.00	10.00	4.00	54.00
		Worked	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		Projected	54.00	44.00	44.00	34.00	34.00	34.00	34.00	34.00
Jeff Beck	**Clerk**		**Mon**	**Tue**	**Wed**	**Thu**	**Fri**	**Sat**	**Sun**	**Total**
		Scheduled	0.00	0.00	0.00	6.75	10.25	9.00	7.50	33.50
		Worked	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		Projected	33.50	33.50	33.50	33.50	33.50	33.50	33.50	33.50

The projected hours are based on the employee's schedule and the number of hours they've already worked. For example, an employee is scheduled Monday to Friday, for 8 hours a day, and a total of 40 scheduled hours, but the employee works 10 hours on Monday and Tuesday; as a result, if run on a Wednesday, the employee is projected to work 44 hours; the 20 hours the employee already worked on Monday and Tuesday, plus the additional 24 hours the employee is scheduled to work on Wednesday, Thursday, and Friday.

Punch Exception Report.

When employees punch in or out for work, and record their breaks, the application compares the punches to their scheduled times, and any differences, such as an employee punching in earlier than they were scheduled, are considered exceptions.
The Punch Exception Report summarizes all these exceptions for you and groups them by zone, department, job, or employee.



Punch Exception Report **Dayforce**

Date Range: 5/9/2010 - 5/22/2010 Run By: Stephane. Lo
Location: 1-Square Mall Run Date: 5/14/2010 4:13:13 PM

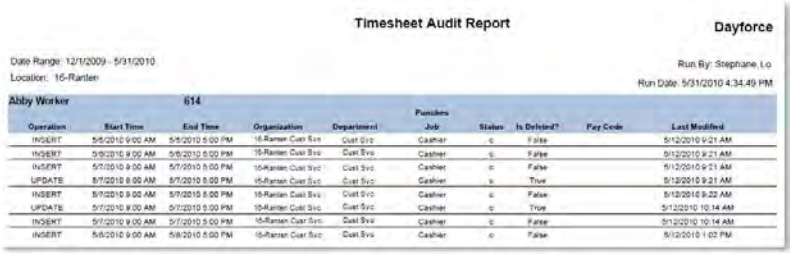
Name	Employee ID	Date	Exception	Scheduled Time	Punch Time
FT					
Brooke Moran	90022				
		5/11/2010	Absent	9:00 AM	
			Missed Meal/Break	12:45 PM	
		5/12/2010	Absent	9:00 AM	
			Missed Meal/Break	12:45 PM	

Timesheet Audit Report.

Run the Timesheet Audit Report for a listing of the changes made to your location's time and attendance records within Dayforce. The application tracks changes to punches, meals and breaks, and pay adjustments.
For each change made to one of these items in an employee's time and attendance records, the report lists the result of the change and the 'operation' that was performed, which can be one of the following:

- INSERT. A new item was added to an employee's time and attendance records.
- UPDATE. An item was changed in the employee's records, such as changing the time a meal occurred or when an employee punched out for work. If the item was deleted, the application specifies 'True' under the Is Deleted? column of the report.

For each record the report also lists the punch status, where applicable, as 'c', 'a', 'm', or 'p'; 'c' represents a 'complete' status, assigned to records where the employee has successfully punched in and out for a shift; 'a' represents an 'active' status, assigned when employees are still 'on the clock' and have punched in for work but not punched out; 'm' represents a 'meal' status assigned to meal punches; 'p' represents a 'problem' status, assigned to records that have a problem with them, such as a record where the employee punched in but forgot to punch out.



Timesheet Audit Report

Dayforce

Date Range: 12/1/2009 - 5/31/2010
Location: 16-Ranlan

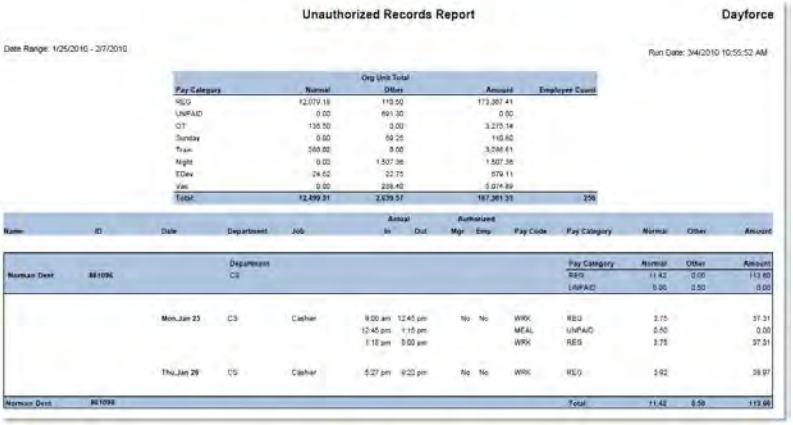
Run By: Stephane Lo
Run Date: 5/31/2010 4:34:49 PM

Abby Worker 614

Operation	Start Time	End Time	Organization	Department	Punches Job	Status	Is Deleted?	Pay Code	Last Modified
INSERT	5/6/2010 9:00 AM	5/6/2010 5:00 PM	16-Ranlan Cust Svc	Cust Svc	Cashier	c	False		5/12/2010 9:21 AM
INSERT	5/6/2010 9:00 AM	5/6/2010 5:00 PM	16-Ranlan Cust Svc	Cust Svc	Cashier	c	False		5/12/2010 9:21 AM
INSERT	5/7/2010 9:00 AM	5/7/2010 5:00 PM	16-Ranlan Cust Svc	Cust Svc	Cashier	c	False		5/12/2010 9:21 AM
UPDATE	5/7/2010 9:00 AM	5/7/2010 5:00 PM	16-Ranlan Cust Svc	Cust Svc	Cashier	u	True		5/12/2010 9:21 AM
INSERT	5/7/2010 9:00 AM	5/7/2010 5:00 PM	16-Ranlan Cust Svc	Cust Svc	Cashier	c	False		5/12/2010 9:22 AM
UPDATE	5/7/2010 9:00 AM	5/7/2010 5:00 PM	16-Ranlan Cust Svc	Cust Svc	Cashier	c	True		5/12/2010 10:14 AM
INSERT	5/7/2010 9:00 AM	5/7/2010 5:00 PM	16-Ranlan Cust Svc	Cust Svc	Cashier	c	False		5/12/2010 10:14 AM
INSERT	5/8/2010 9:00 AM	5/8/2010 5:00 PM	16-Ranlan Cust Svc	Cust Svc	Cashier	c	False		5/12/2010 1:02 PM

Unauthorized Records Report.

The Unauthorized Records Report displays a list of employees with unauthorized pay details; these can be records on the timesheet, such as a worked, unscheduled shift, that have not been authorized by a manager. Or, the report can display records that the employees have not authorized on their timecard.



Unauthorized Records Report

Dayforce

Date Range: 1/25/2010 - 2/7/2010

Run Date: 3/4/2010 10:55:52 AM

Org Unit Total

Pay Category	Normal	Other	Amount	Employee Count
REG	12,079.18	110.00	173,367.41	
UNPAID	0.00	691.30	0.00	
OT	136.50	0.00	3,275.14	
Sunday	0.00	59.25	110.60	
Train	240.02	8.00	3,596.61	
Night	0.00	1,507.36	1,507.36	
TDev	24.52	22.75	579.11	
Vac	0.00	208.40	5,074.89	
Total:	12,480.31	2,639.57	187,361.33	259

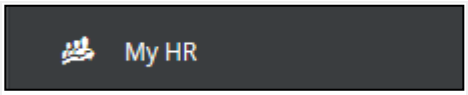
Name	ID	Date	Department	Job	Actual In	Actual Out	Authorized Mgr	Authorized Emp	Pay Code	Pay Category	Normal	Other	Amount
Norman Dent	861096		Department CS							Pay Category REG	Normal 11.42	Other 0.00	Amount 113.60
										UNPAID	0.00	0.50	0.00
		Mon Jan 25	CS	Cashier	9:00 am	12:45 pm	No	No	WRK	REG	3.75		37.31
					12:45 pm	1:15 pm			MEAL	UNPAID	0.50		0.00
					1:15 pm	5:00 pm			WRK	REG	3.75		37.31
		Thu Jan 28	CS	Cashier	5:27 pm	9:23 pm	No	No	WRK	REG	3.92		38.97
Norman Dent	861096									Total:	11.42	0.50	113.60

Please refer to: http://mypathprod.dayforce.com/introducing-employee-records

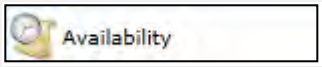
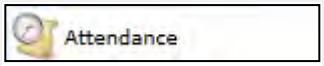
Procedure

Scenario
In this lesson, you'll review some of the basic features in My HR.

My HR lets you review a lot of information about your employees, such as their employment status, availability to work, and entitlement balances.

Step	Action
1.	Start by navigating to My HR Click the Menu button.
2.	Click the My HR menu. 
3.	Your employees appear When you first go to My HR, a list of employees that you manage will appear on the screen. By clicking on an employee's name, you can review their HR information.
4.	HR Forms Forms relating to onboarding, employment information, or updating an employee's personal information can be accessed and completed here. The forms that are available will depend on your company's setup.
5.	Let's look at the filters Click the Filter button.
6.	Employee filters There are many filters you can use to narrow down the list of employees that appear. In this example, you'll filter for all employees who work in the Receiving department and have "Al" in their name.

Step	Action
7.	Click in the Name field. Search Address Book
8.	Enter the desired information into the field. Enter "Al".
9.	Click the Department menu. ...
10.	Click the Receiving list item. Receiving
11.	Click the Close button. Close
12.	Click the Apply Filter button. Apply Filter
13.	Your filtered employees appear The employees who match all the filters you selected appears in the results. Let's select Alfonso Boyd and take a look at his HR information in Dayforce.
14.	Click the Alfonso Boyd link. Alfonso Boyd
15.	Click the Close button.
16.	Alfonso's Employment status Here we can see Alfonso's employment status. This screen lets you review information and defining details such as pay information, shift rotations, and rates. Depending on your company setup, you may be able to update this information here as well.
17.	Next, let's review Alfonso's Work Assignments Click the Work Assignments tab. Work Assignments
18.	Work Assignments You can review what position an employee is assigned to here. Work assignments determine who manages the employee and which location the employee is working from.

Step	Action
19.	Let's look at Alfonso's Details next Click the Details tab.
20.	Alfonso's Employment status The Details page is a summary of all the HR information for an employee. Here we can see important information such as Alfonso's hire date, current status, position and location, pay information, and contact information.
21.	Next, navigate to Availability Click the Availability tab. 
22.	Availability Calendar When scheduling your employees, you want to know if they're available to work. The availability screen provides you a calendar view of all days and hours that an employee is available to be scheduled. This is also where you will update an employee's availability if needed.
23.	Finally, let's look at Attendance Click the Attendance tab. 
24.	Employee Attendance The Attendance screen shows you detailed information on absences for the current year. For example, if an employee has approved time off, their time off days will be highlighted on the calendar with the corresponding color in the legend. You can also view the attendance calendar for previous or future years by clicking on the green arrow buttons.
25.	This concludes the My HR overview In this lesson we introduced some of the basic features available in My HR. Depending on your company's setup, you may have different features available to use.
26.	End of Procedure.

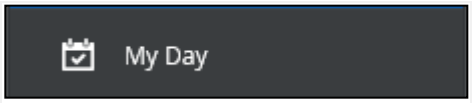
Please refer to: http://mypathprod.dayforce.com/recording-time-off-for-employees

Procedure

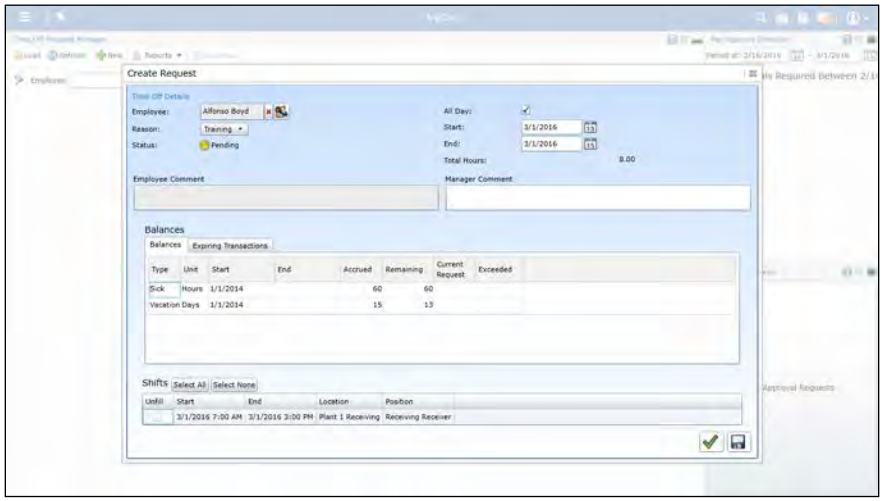
Scenario

Katie had asked to attend a day of training on Tuesday March 1 but won't be able to attend.

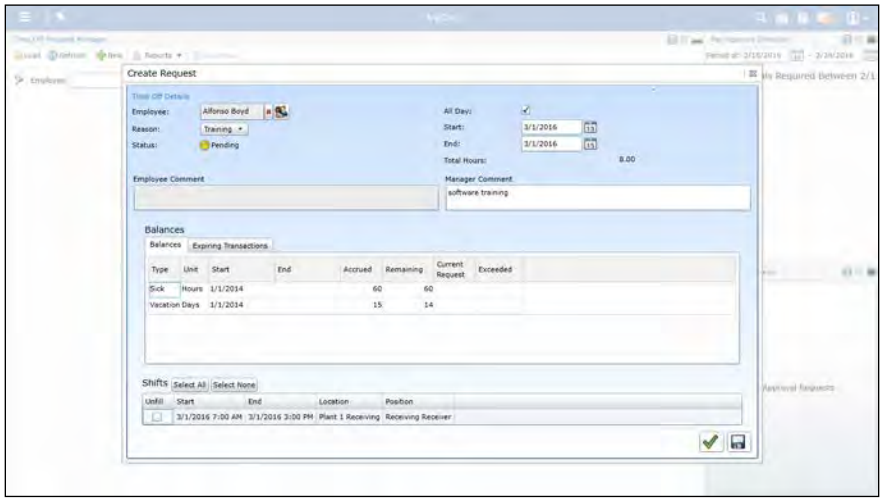
In her place, request a day of training for Alfonso.

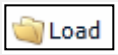
Step	Action
1.	Open the Time Off Request Manager You'll find this screen in My Day. Click the Expand button.
2.	Click the My Day button. 
3.	Create a time off request for Alfonso Boyd Click the New button.
4.	Click the Employee button.

Step	Action
5.	Click the Alfonso Boyd link. Alfonso Boyd
6.	Select the Reason In this example you'll select 'Training'. Click the Reason list.
7.	Click the Training list item. Training
8.	Select the start date Alfonso will be attending one day of training. Click the Show Calendar button.
9.	Click the desired date. Click the Tuesday, March 1, 2016 button. 1



Step	Action
10.	Enter a comment Add any comments in the Manager Comment box as required. Click in the Manager Comment field.
11.	Enter the desired information into the Manager Comment field. Enter "software training".



Step	Action
12.	Approve the form Click the Approve button.
13.	You've successfully entered time off for an employee! Alfonso is now recorded as attending training and won't be scheduled on this day.
14.	Next, cancel Katie's training by displaying approved requests Approved requests don't appear in the Time Off Request Manager by default. To cancel Katie's request, change the search filter. Click in the Load field. 

Step	Action
15.	Set the list to display approved requests Click the Approved Status button.
16.	Click the Search button.
17.	Cancel Katie's training she can no longer attend Click the Cancel button.
18.	You've successfully canceled a request! Katie Nash is no longer recorded as attending training and can again be scheduled during this time.
19.	End of Procedure.

Reviewing and updating your location's tasks.

Your organization uses Dayforce to create and track the various tasks locations need to complete. Typically, tasks are created by corporate and assigned to the different locations that need to complete them.

After completing this lesson, you'll be able to:

- Assign employees to a task
- Record task progress

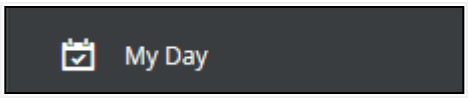
To review the demo:

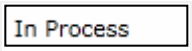
1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Joel Harris
Senior eLearning Consultant
Toronto, Ontario
joel.harris@ceridian.com

Procedure

Scenario
In this example, you'll assign Elaine to the Sales Prep task and later mark it as 25% complete.

Step	Action
1.	Open My Tasks Checklist You'll access My Tasks Checklist from the My Day screen. Click the Menu button.
2.	Click the My Day menu. 
3.	Expand the My Tasks Checklist Click the Expand button.

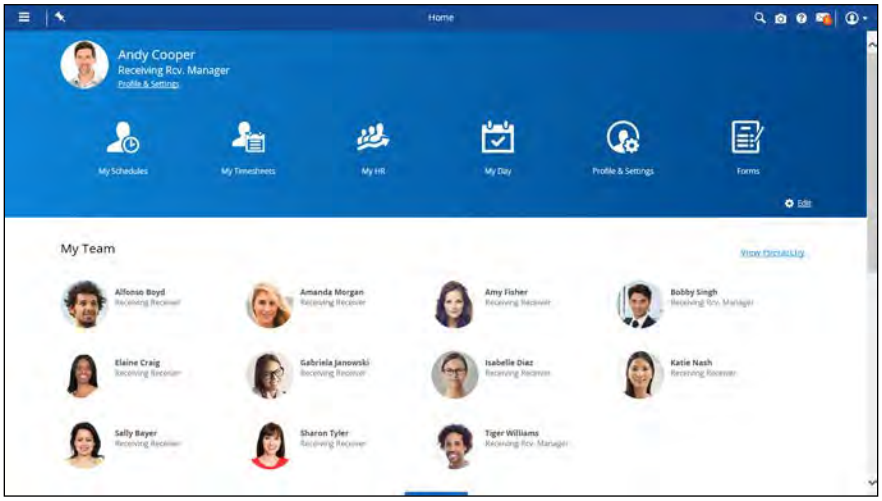
Step	Action
4.	Open the Sales Prep task Click the Sales Prep link.
5.	Assign Elaine to begin working on the task later this week Click the New button.
6.	Click the Employee button.
7.	Click the Elaine Craig link.
8.	Click the Show Calendar button.
9.	Click the August 22, 2016 button.
10.	Click the Save button.
11.	You've successfully assigned Elaine to this task! Let's say some time has passed and Elaine has made some Sales Prep progress. The next thing you'll do is update the task's completion status.
12.	Update the task to show it's 25% complete Click the Sales Prep link.
13.	Click the Status list.
14.	Click the In Process list item. 
15.	Click the 25% button.

Step	Action
16.	Save your changes Click the Save button.
17.	You've successfully assigned an employee to a task and updated its status! Elaine Craig is now aware she's responsible for Sales Prep and you've gone ahead and updated its completion status to 25% to reflect her work.
18.	End of Procedure.

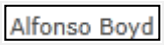
Please refer to: http://mypathprod.dayforce.com/viewing-and-updating-employee-records

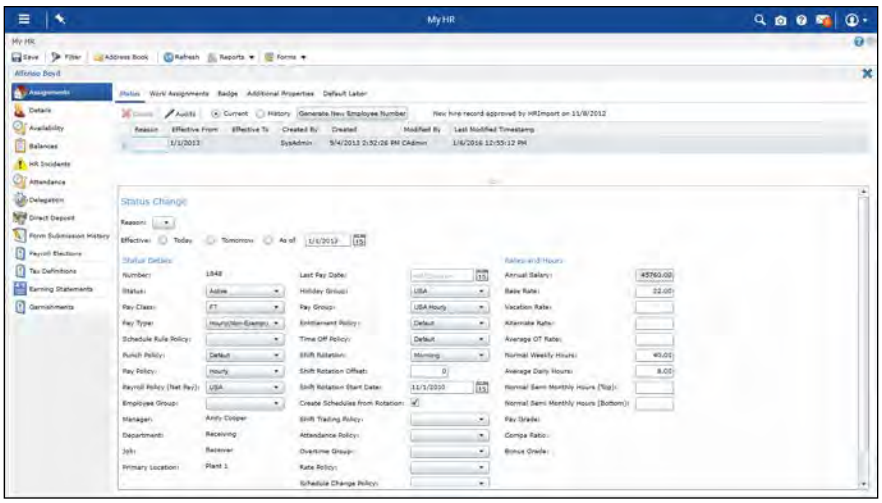
Procedure

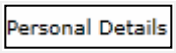
Scenario
Your employee, Alfonso Boyd, got married and moved into a new house. Update his record to reflect these events.



Step	Action
1.	First, open Alfonso's employee record from My HR You'll access employee records from My HR. Click the Menu button.

Step	Action
2.	Click the My HR button.
3.	Click the Alfonso Boyd link. 
4.	Overview of the employee record You can now see Alfonso's employee profile where you can see key information such as: - Whether the employee is part-time or full-time, paid hourly or salary. - The employee's manager, primary job, department, and which location they work at. Some of the information may originate from your organization's HR system and can't be edited. If any uneditable information is incomplete or incorrect, contact your Manager and they will work directly with the HR department to correct it.



Step	Action
5.	Update Alfonso's marital status and address You can update an employee's personal information from the Details screen. Click the Details tab.
6.	Click in the Personal Details field. 

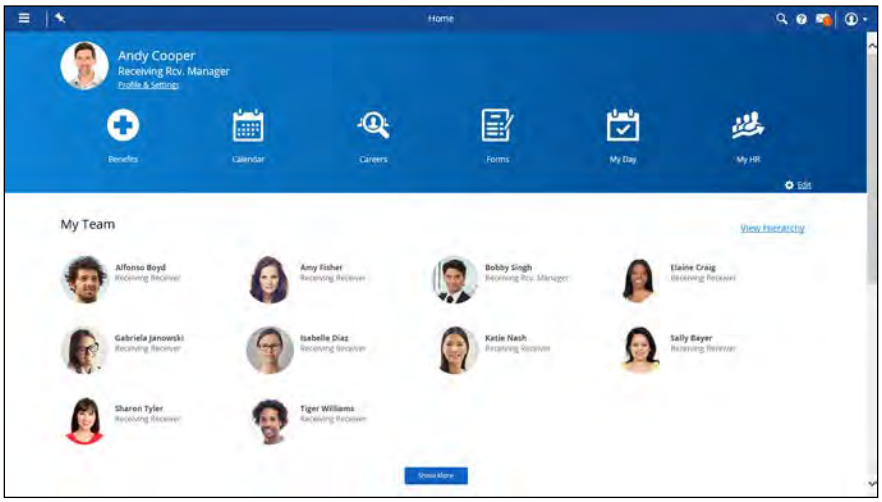
Step	Action
7.	Click the Marital Status menu. Single
8.	Click the Married list item. Married
9.	Save your changes Click the Save button. Save
10.	Next, update Alfonso's address Alfonso has moved to a new home and you'll need to add a new primary address to his record. Click in the Address field. Address
11.	Add a new primary address Adding a new primary address to an employee's record automatically end dates the current primary address. Click the New button. New
12.	Click the Type menu.
13.	Click the Primary Residence list item. Primary Residence
14.	Click in the Address field.
15.	Enter the desired information into the Address field. Enter "100 Yonge Street".
16.	Click in the City field.
17.	Enter the desired information into the field. Enter "Toronto".

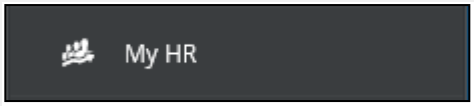
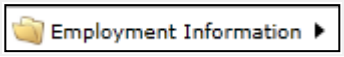
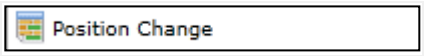
Step	Action
18.	Click the Country list.
19.	Click the Canada list item. Canada
20.	Click the State / Province list.
21.	Click the Ontario list item. Ontario
22.	Click in the Zip / Postal Code field.
23.	Enter the desired information into the Zip / Postal Code field. Enter "M1K3R5".
24.	Enable Payroll Mailing If enabled payroll documentation, including year end forms, will be sent to this address. Click the Payroll Mailing option.
25.	Save your changes Click the Save button. Save
26.	You've successfully updated Alfonso's HR record You have updated Alfonso's marital status, and have added his new primary address to his employee record.
27.	End of Procedure.

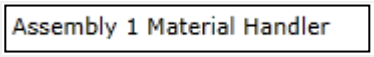
Please refer to: http://mypathprod.dayforce.com/updating-an-employees-work-assignments

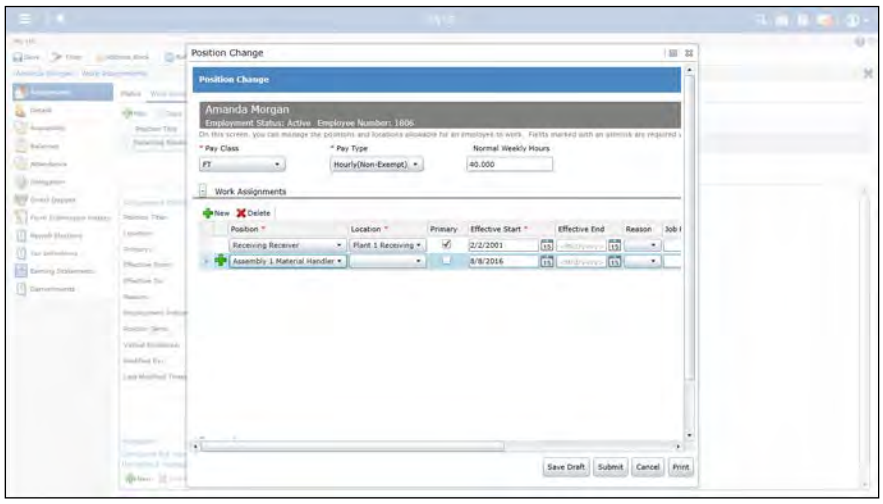
Procedure

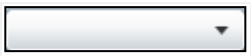
Scenario
Amanda Morgan was recently trained to work a new position at Plant 3. Let's add this new work assignment to her employee record using the Position Change form.

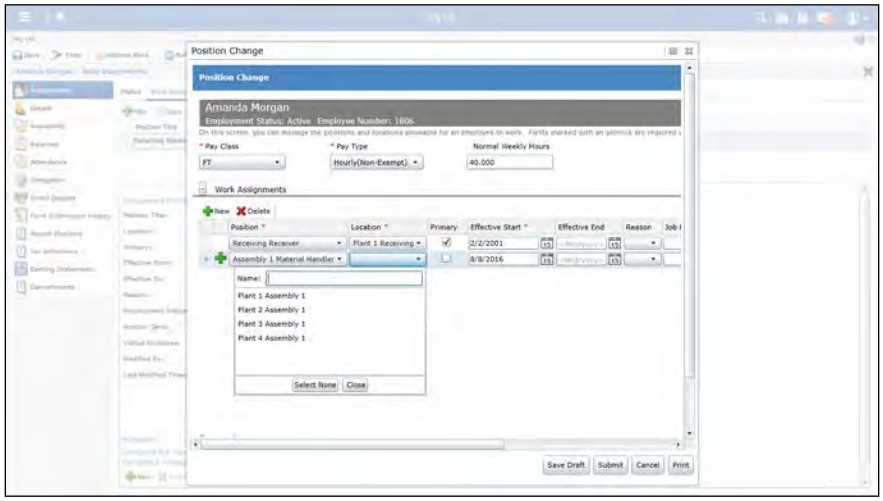


Step	Action
1.	First, open Amanda's employee record This is where you'll access the Position Change form and enter her new work assignment. Click the Menu button.
2.	Click the My HR button. 
3.	Click the Amanda Morgan link.
4.	Open the Position Change form Click the Forms button.
5.	Click the Employment Information button. 
6.	Click the Position Change list item. 

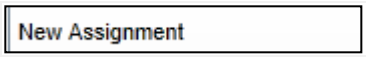
Step	Action
7.	Position Change form Here you can change an employee's position, or add an additional work assignment. Let's add Amanda's new work assignment.
8.	Click the New button.
9.	Select the Position Amanda's new work assignment is an Assembly 1 Material Handler. Click in the Position field.
10.	Click the Assembly 1 Material Handler list item. 
11.	Click the Close button.



Step	Action
12.	Next, select the Location Amanda's new position is at Plant 3. Click in the Location field. 



Step	Action
13.	Click the Plant 3 Assembly 1 list item. Plant 3 Assembly 1
14.	Click the Close button. Close
15.	Primary Work Assignment If the Primary checkbox is selected, this position will be identified as the employee's primary job. This is the job that employees are assigned by default when you schedule them to a shift. Only one job can be the primary job. If the employee is switching primary jobs, ensure you clear the Primary check box on their previous primary job.
16.	Future assignments and temporary assignments You can select when the employee is available to be scheduled in their new job and when they're no longer eligible to work the job. By default, if the Effective End date is blank, the employee's eligibility for this job does not end.

Step	Action
17.	Click the scrollbar.
18.	Reason for change While not a mandatory field, it's always good to select a reason for a position change or addition for future reference. Click in the Reason field.
19.	Click the New Assignment list item. 
20.	Set the rate for this position Amanda will be paid at a rate of $14 an hour when she works as an Assembly 1 Material Handler. Click in the Job Rate field.
21.	Enter the desired information into the Job Rate field. Enter "14".
22.	Click the Submit button.
23.	You have successfully added a new work assignment! Amanda is now eligible to work as an Assembly 1 Material Handler at Plant 3.
24.	End of Procedure.

Creating a new personal goal for an employee.

You're able to add a new personal goal for an employee who reports to you.

After entering the details of their goal you'll save it to Dayforce and, the next time the employee launches Performance, they'll be notified of their new strategic objective in their Overview. As they work towards this goal they'll regularly update it giving you insight to their progress. At the end of the year you can reflect upon these goals and updates to help lead your performance review discussions.

After completing this lesson, you'll be able to:

- Add a new personal goal for an employee
- Understand the importance of each setting in the Create Goal dialog

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Joel Harris
Senior eLearning Consultant
Toronto, Ontario
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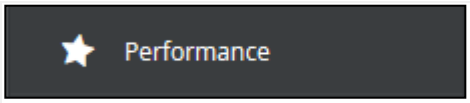
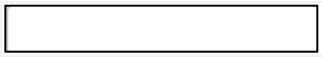
Procedure

Scenario
After discussing annual goals with Amy Fisher you've agreed that she should lead a training initiative to help new hires use the labelling machine.

Enter this goal in Dayforce HCM on her behalf.

Step	Action
1.	Add a new personal goal for Amy Fisher This year, one of Amy's goals involve training new hires on the labelling machine at Plant 1. Add this for her from the Goals screen. Click the Menu button.
2.	Click the Performance button. 
3.	Click the Goals tab.
4.	Is this goal for yourself or an employee? Before clicking Create Goal select the correct screen: Team Goals, All Goals, or My Goals. When Team Goals or All Goals are selected and you click Create Goal you'll be adding a new goal for one or more employees. However, when My Goals is selected and you click Create Goal you'll be creating a new goal for yourself. Confirm you have the right option selected before creating a new goal.
5.	Add Amy's personal goal Next, you'll enter the details of her goal and assign it to her. Click the Create Goal button.
6.	Set the Goal Name This is how the goal will appear to you, your employee, and anyone else who has access to their performance information. Goals should have an accurate and descriptive title. Click in the Goal Name field.

Step	Action
7.	Enter the desired information into the Goal Name field. Enter "Train at least 10 new hires how to use the label maker".
8.	Add a description of the goal Here you'll describe what her goal involves, how she will plan to achieve it, and the impact it will have on your business. The Description will be entered for you to speed things up. Click in the Description field.
9.	Set the Goal Category This is the type of goal you're creating. This helps organize your goals and assists with reporting. Because this goal is related to training, you'll select 'People'. Click in the Goal Category field.
10.	Click the People list item.
11.	Enter the Goal Area Use the Goal Area field to further define and categorize a goal if you'd like to be more specific than the Goal Category allows. You can sort and filter by Goal Areas in Performance Reports. In this example you'll enter 'Training'. Click in the Goal Area field. 
12.	Enter the desired information into the field. Enter "Training".
13.	Specify the Start Date Use this field to set when the employee should begin working towards this goal. Click the Start Date button.

Step	Action
14.	Click the December 1, 2015 button. 1
15.	Next, enter the Due Date This is when the goal needs be completed by. In this example you'll enter the last day of the year: 12/31/2016. Click in the Due Date field.
16.	Enter the desired information into the field. Enter "12/31/2016".
17.	Select how this goal will be measured You can select if this goal will be measured against a target amount, a percentage, or none. Because Amy is asked to train 10 employees she can update the goal each time a delivery is complete. Therefore, you'll set this option to Actual/Target. Click the Measure Type menu. Select an Option...
18.	Click the Actual/Target list item. Actual / Target
19.	Set the Target Type This controls if the goal be measured using a Count or Dollar Amount. Click the Target Type menu. Select an Option...
20.	Click the Count list item. Count
21.	Set the Target amount of this goal Click in the Target field.
22.	Enter the desired information into the Target field. Enter "10".

Step	Action
23.	Create your goal Now that your goal is entered you can assign it to Amy. Click the Next button.
24.	Click the Amy Fisher option.
25.	Create your goal Now that your goal is entered and assigned to Amy, you can click Finish to add it to Dayforce. Click the Finish button.
26.	You've successfully added a new personal goal for Amy! Amy will be made aware that she's expected to train 10 new employees when she logs into Dayforce and reviews her Performance Overview dashboard. Going forward, you can monitor Amy's updates on this goal to ensure she's completed it before the end of the year. If the deadline is approaching and it remains incomplete, you should reach out to Amy to make sure there's nothing preventing her from completing her annual goal.
27.	End of Procedure.

Managing employee availability.

In this lesson, you'll learn to use the Availability screen to update at what time during the week an employee is available to work.

After completing this lesson, you'll be able to:

- Record an employee's availability

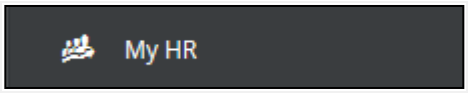
To review the demo:

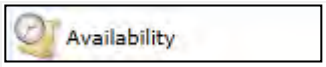
1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

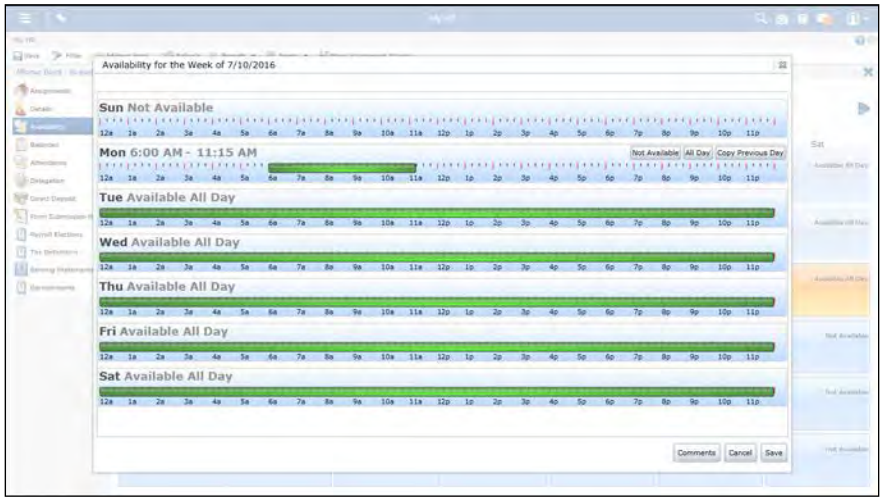
Narrated by Charlene Fernandes
eLearning Consultant
Toronto, Ontario
charlene.fernandes@ceridian.com

Procedure

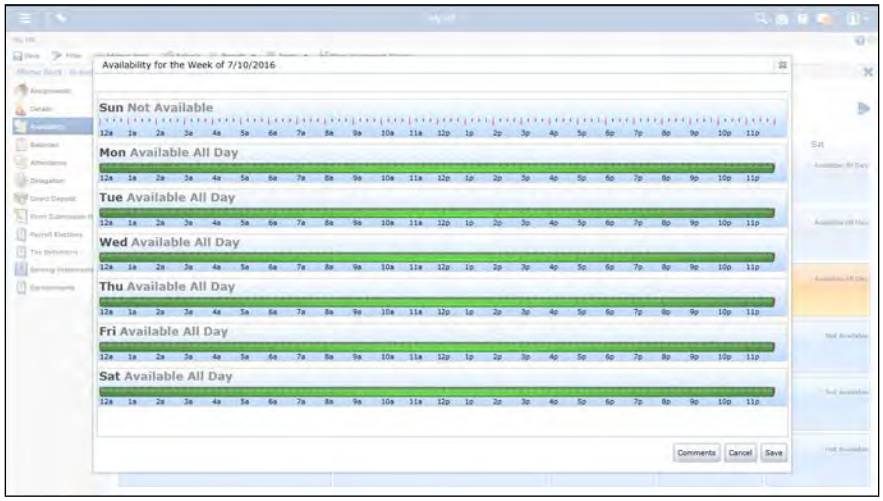
Scenario
Alfonso's Monday night class ends next month. Update his availability to reflect the change.

Step	Action
1.	Open My HR This is where you can access Alfonso's availaibility. Click the Menu button.
2.	Click the My HR menu. 
3.	Click the Alfonso Boyd link.

Step	Action
4.	Click the Availability button. 
5.	Alfonso's availability appears The times listed on the calendar are when the employee is available to work. If the availability does not reflect when the employee is available to work, you can set their new availability from here. Notice that the first time you load an employee's availability, the week highlighted in orange is the earliest you can change the employee's availability.
6.	Change Alfonso's default availability starting July 11 Click the Edit Drop-Down button.
7.	Temporary or ongoing availability change? You can choose to temporarily change your availability for a specific week, or edit the default availability going forward. In this example, you'll edit the default availability.
8.	Click the Edit Default Availability list item.



Step	Action
9.	Set Alfonso to be available all day Mondays Dayforce displays the current availability. Moving your pointer over a specific day will display the **Not Available**, **All Day**, and **Copy Previous Day** buttons. Click the All day button. All Day



Step	Action
10.	Save your changes Click the Save button. Save
11.	You've successfully updated Alfonso's availability Once you've set the default availability, Dayforce assigns it to the employee every week. Before he was only available from 6AM - 11:15AM on Mondays whereas now he is Available All Day.
12.	End of Procedure.

Using the position and compensation change form.

To record a position and compensation change, you can submit a Position and Compensation Change form.

After completing this lesson, you'll be able to:

- Review key employee position and compensation information
- Update information and see the historical impact and peer comparison

To review the demo:

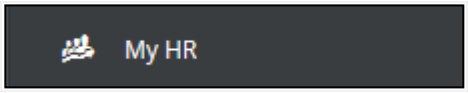
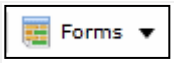
1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

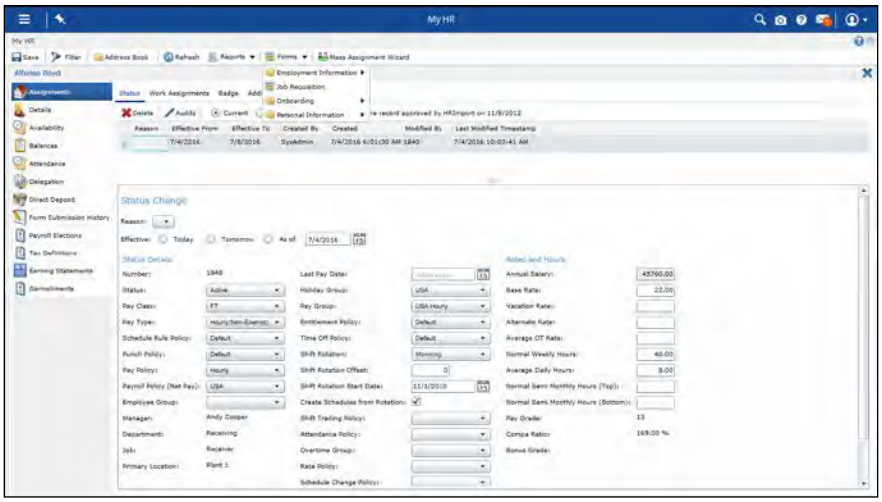
Narrated by Charlene Fernandes
eLearning Consultant
Toronto, Ontario
charlene.fernandes@ceridian.com

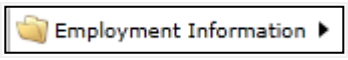
Procedure

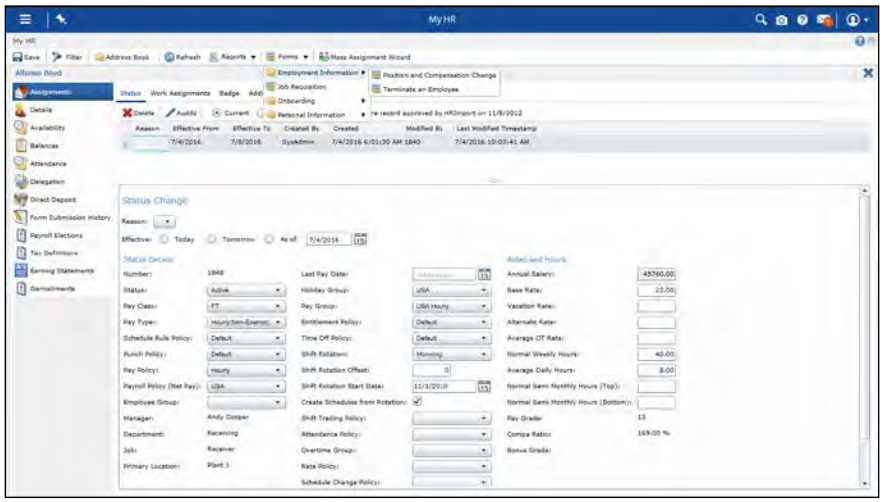
Scenario

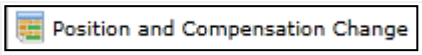
In this example, you're giving Alfonso Boyd a $1.50 raise effective today.

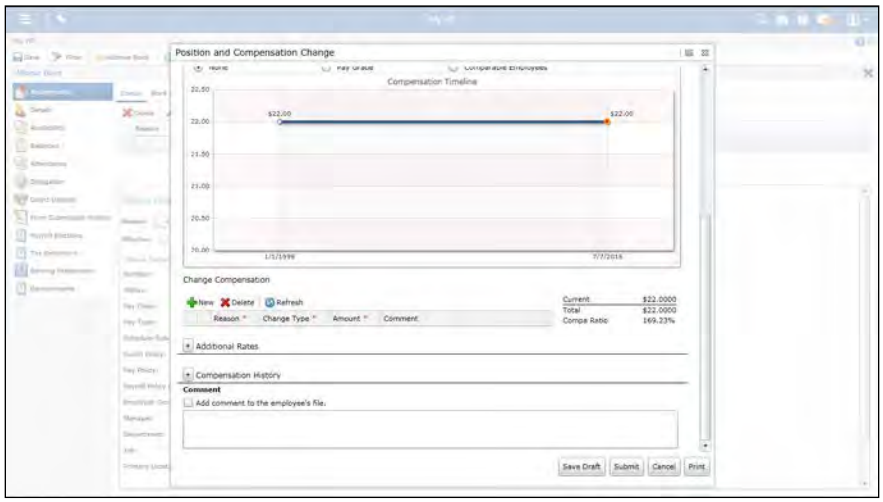
Step	Action
1.	Open My HR This is where you can open the Position and Compensation Change Form. Click the Menu button.
2.	Click the My HR button. 
3.	Click the Alfonso Boyd link.
4.	Click the Forms button. 



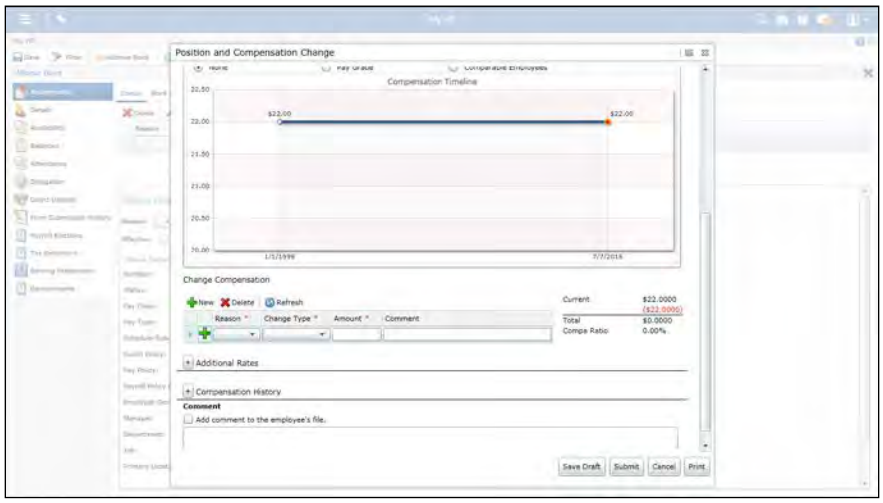
Step	Action
5.	Click the Employment information field. 



Step	Action
6.	Click the Position and Compensation Change list item. 
7.	Position and Compensation Change Form The Position and Compensation Change Form ties compensation changes to the employee's position assignment along with other pay details – all within a single form. The form is a robust tool that not only enables you to update an employee's compensation but also embeds analytics and benchmarking to help you make better decisions.
8.	First, set the Effective Date Alfonso's compensation increase will come into effect today. Click the Today option.
9.	Increase Alfonso's compensation by $1.50 Click the Scroll Down button.

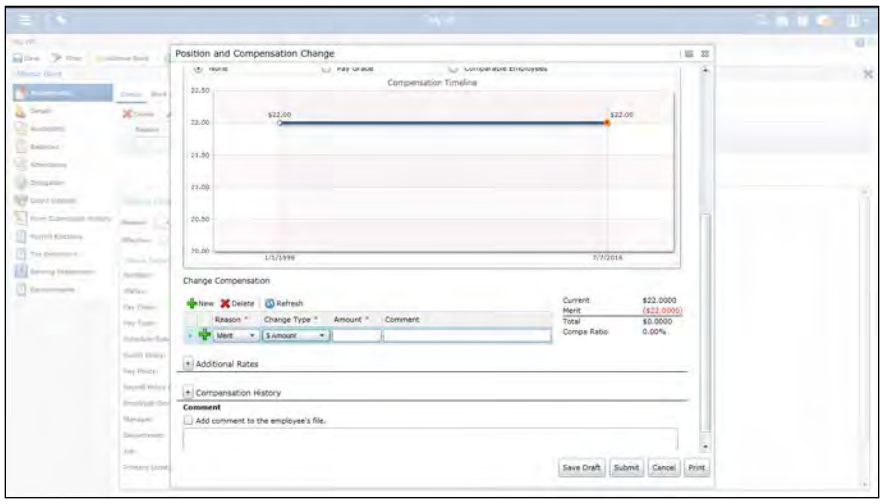


Step	Action
10.	Update Alfonso's compensation Click the New button.

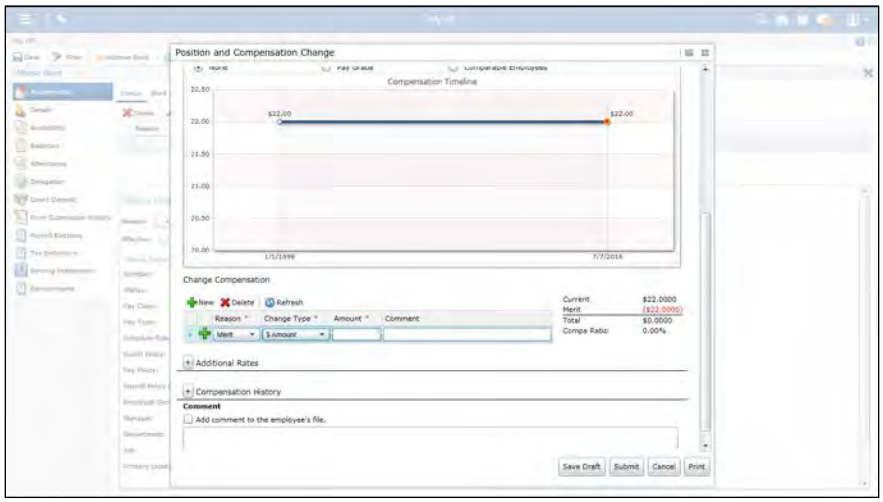


Step	Action
11.	Select the reason In this example you'll select 'Merit'. Click in the Reason field.

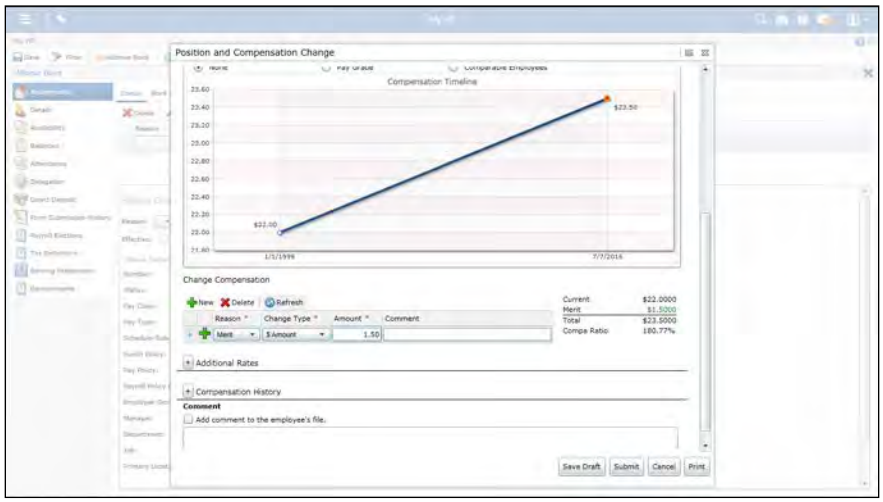
Step	Action
12.	Click the Merit list item. Merit
13.	Set the type of change This controls how the Amount will affect the employee's salary. Click the Change Type list.
14.	Click the $ Amount list item. $ Amount



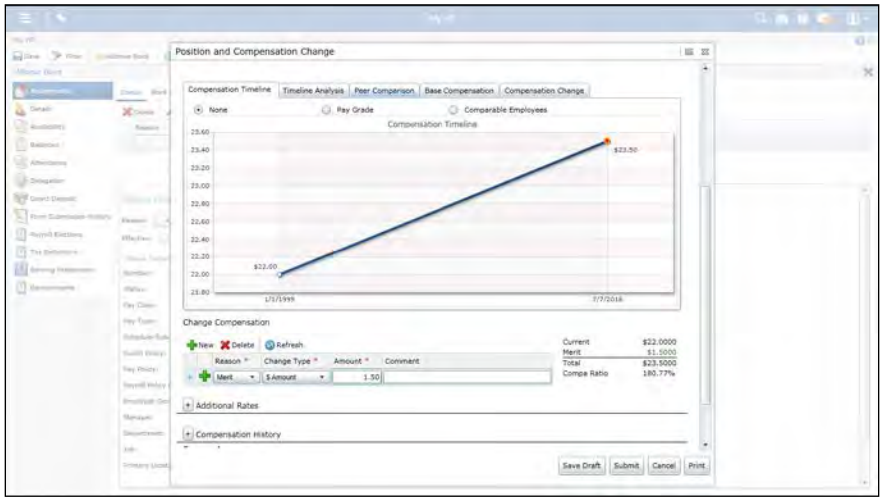
Step	Action
15.	Enter the amount This is the amount that will be added to Alfonso's hourly rate. Click in the Amount field.



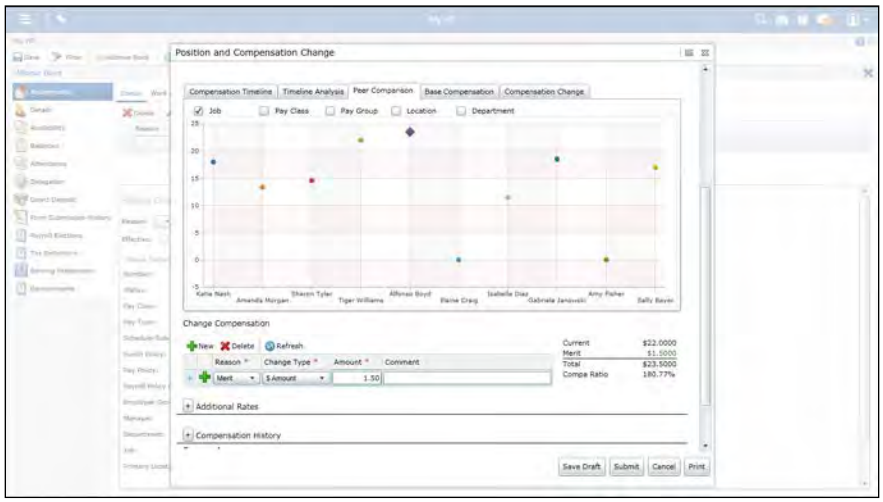
Step	Action
16.	Enter the desired information into the Amount field. Enter "1.50".
17.	Analyze the proposed change Click the refresh button in the change compensation section to update the graphs and charts. Click the Refresh button.
18.	Compensation Timeline Once entered, Dayforce provides a series of graphs and charts that help you analyze the proposed change and benchmark the employee's proposed compensation against their peers. The Compensation Timeline provides a graph that displays Alfonso's compensation over the duration of his employment.



Step	Action
19.	Scroll up.



Step	Action
20.	Benchmark Alfonso's proposed compensation change against his peers Click the Peer Comparison tab. Peer Comparison
21.	Peer Comparison Alfonso is indicated on the chart with a diamond icon while all his peers are identified with circles.



Step	Action
22.	Submit your changes If you have authority to enter compensation changes without the need for further approval, the employee's compensation information will be updated immediately. Click the Submit button. Submit
23.	You've successfully updated Alfonso's compensation! Using the Position and Compensation Change form, you increased Alfonso's hourly rate by $1.50, effective today.
24.	End of Procedure.

Adding a new hire.

Store managers can add new hires into Dayforce using the New Hire Form found in My HR. Once the form is completed it will be submitted to a DSS for approval.

After completing this lesson, you'll be able to:

- Create a new hire record

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Aaron Lee

eLearning Developer

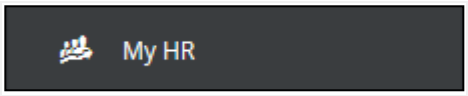
Toronto, Ontario

aaron.lee@ceridian.com

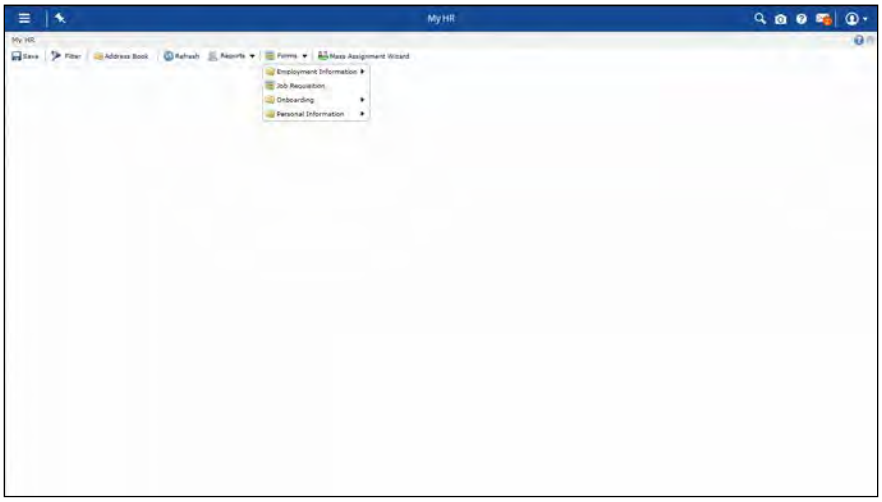
Procedure

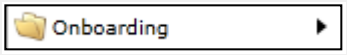
Scenario
You've hired Brian Dunn as an Assembly 1 Receiving Receiver.

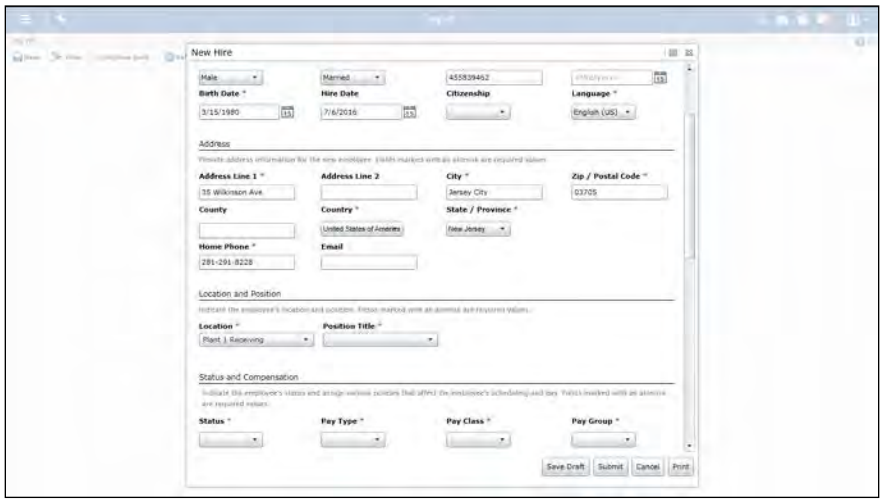
Create his employee record using the New Hire form.

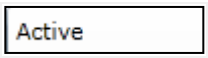
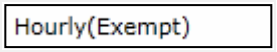
Step	Action
1.	Open the New Hire form The New Hire form is available in My HR. Click the Menu button.
2.	Click the My HR button. 

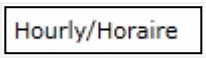
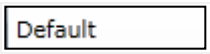
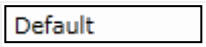
Step	Action
3.	Click the Forms button.

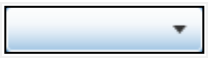
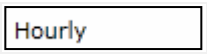


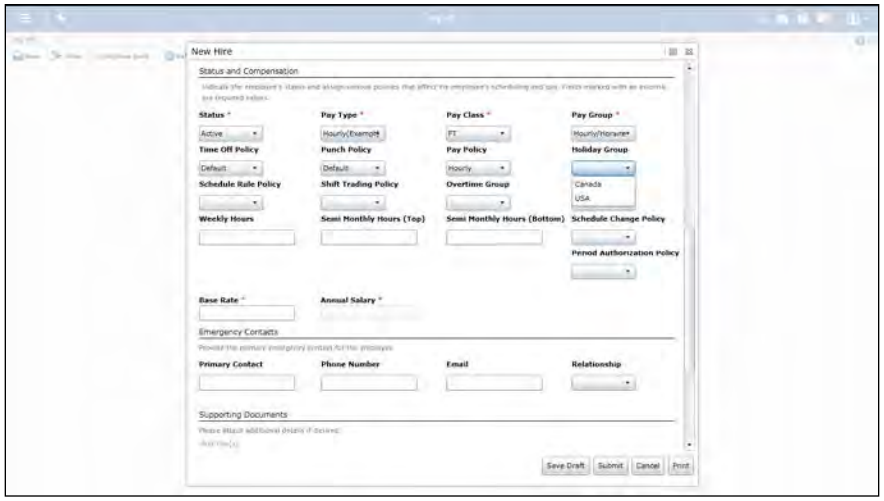
Step	Action
4.	Click the Onboarding button. 
5.	Click the New Hire button.
6.	Personal Details This is the New Hire form. You will need to provide personal details, position, and compensation information when onboarding a new hire. The configuration of this form may look different for your organization. All fields with a red asterisk are mandatory. We've filled out this part of the form for you.



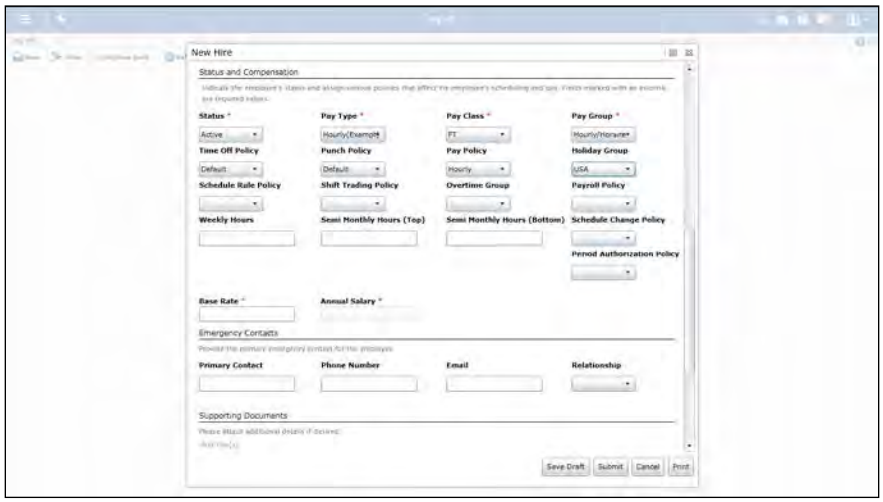
Step	Action
7.	Scroll down
8.	Enter Brian's status and policies Within the Status and Compensation area, managers need to select if the employee will be part-time or full-time, hourly or salary, and what company policies apply to them. The status field tells the system whether this employee is active, inactive, or terminated. Click the Status list.
9.	Click the Active list item. 
10.	Set the Pay Type The Pay Type field tells the system if the employee will be paid at an hourly or salary rate. Click the Pay Type list.
11.	Click the Hourly(Exempt) list item. 

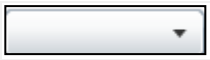
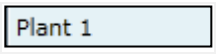
Step	Action
12.	Set the Pay Class The Pay Class tells the system if the employee is a full-time or part-time employee. Click the Pay Class list.
13.	Click the FT list item.
14.	Set the Pay Group The Pay Group field allows managers to select the pay cycle for their employees. The pay cycle defines the frequency the employee will be paid. Click the Pay Group list.
15.	Click the Hourly/Horarire list item. 
16.	Set the Time Off Policy The Time Off Policy defines when an employee can request time away from work by defining blackout periods or probation periods (for new hires). In this example, set the Time Off Policy to default. Click the Time Off Policy list.
17.	Click the Default list item. 
18.	Set the Punch Policy The Punch Policy defines how employee time is entered into the system, i.e., punching in at a time clock or entering hours on a timesheet. Each policy will define the method and rules surrounding employee time. Click the Punch Policy list.
19.	Click the Default list item. 

Step	Action
20.	Set the Pay Policy Pay Policies govern how employee time is handled from a pay perspective, such as how overtime is paid or what shift premiums employees can earn. Click the Pay policy list. 
21.	Click the Hourly list item. 
22.	Set the Holiday Group A Holiday Group is a collection of pay holidays that are applicable to a set of employees. Click the Holiday Group list.

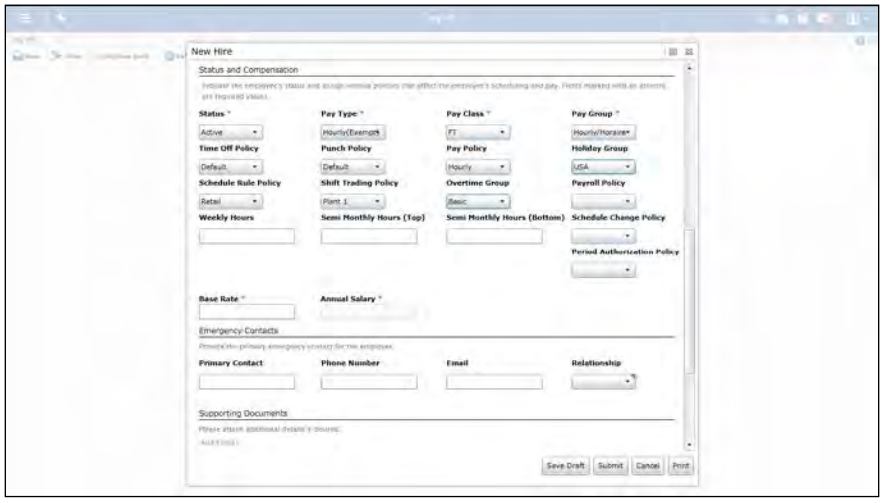


Step	Action
23.	Click the USA list item.

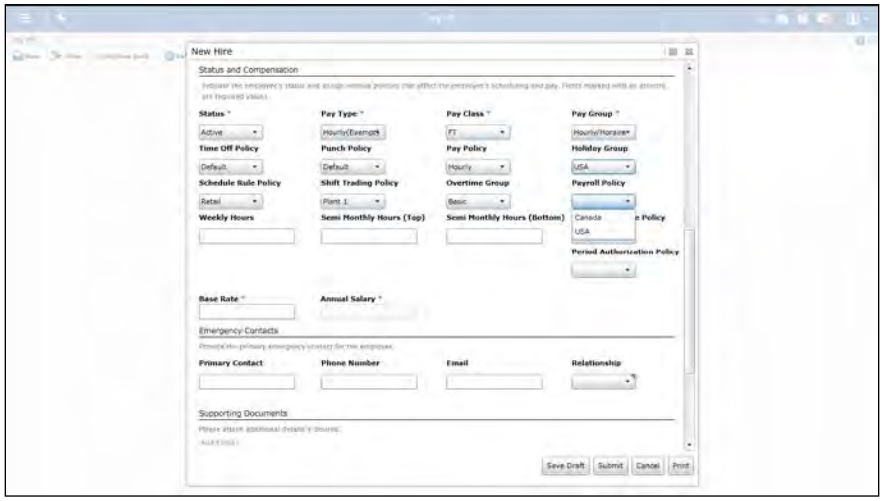


Step	Action
24.	Set the Schedule Rule Policy The Schedule Rule Policy defines the rules around scheduling the employee to work. This defines the minimum/maximum shift length, number of breaks, and any company specific rules. Click the Schedule Rule Policy list. 
25.	Click the Retail list item.
26.	Set the Shift Trading Policy The Shift Trading Policy defines the rules behind employees trading shifts with one another. Click the Shift Trading Policy list.
27.	Click the Plant 1 list item. 
28.	Set the Overtime Group The Overtime Group field is used to group employees together so that they are eligible for or should be offered similar amounts of overtime contained within a single group. Click the Overtime Group list.

Step	Action
29.	Click the Basic list item. Basic



Step	Action
30.	Set the Payroll Policy The Payroll Policy defines the rules behind employees trading shifts with one another. Click the Payroll Policy list. [ ] ▼



Step	Action
31.	Click the USA list item. USA
32.	Set the Weekly Hours The Weekly Hours field represents the average number of hours the employee works weekly and can be used in overtime calculations. Click in the Weekly Hours field.
33.	Enter the desired information into the Weekly Hours field. Enter "40".
34.	Set Brian's Base Rate This is the amount he will be paid per hour. Click in the Base Rate field.
35.	Enter the desired information into the Base rate field. Enter "8".
36.	Submit the new hire record The Submit button will send the form through your company's workflow for approval and checks the form for errors. The Print button will generate a paper version of the form for your own records. Click the Submit button. Submit
37.	You've successfully added a new hire! Brian's employee record and details will be added to the system once the New Hire workflow is complete. Your Human Resources Administrator can review the details of Brian's Dayforce account once it is created and provide his log in credentials to him.
38.	End of Procedure.

Off-boarding an employee.

This lesson describes how to off-board or terminate employees through My HR. When an employee is terminated, Dayforce performs the following:

- 'Un-fills' or removes the employee from any scheduled shift, creating an unfilled shift with the same details.
- Provides an effective end date of any benefit plans assigned to the employee.
- Locks out the employee's user account.

After completing this lesson, you'll be able to:

- Complete the Termination form

To review the demo:

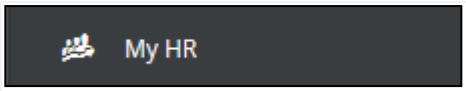
1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

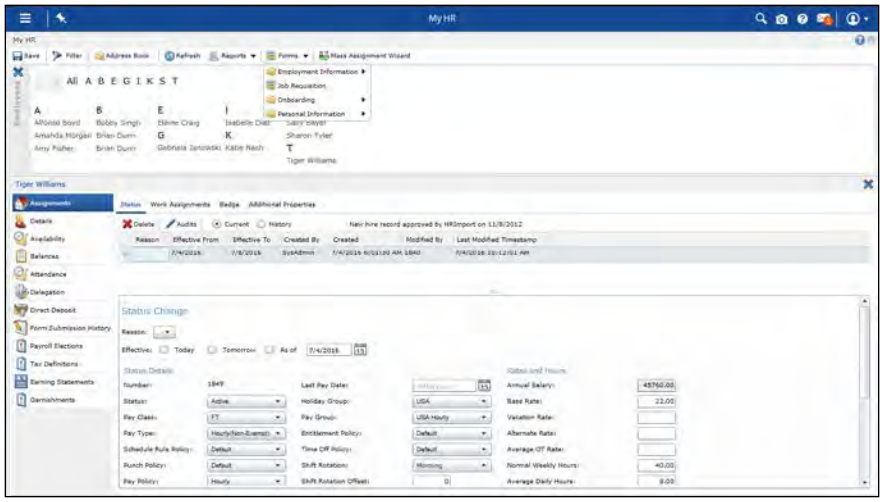
Narrated by Joel Harris
Senior eLearning Consultant
Toronto, Ontario
joel.harris@ceridian.com

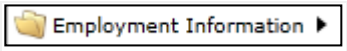
Procedure

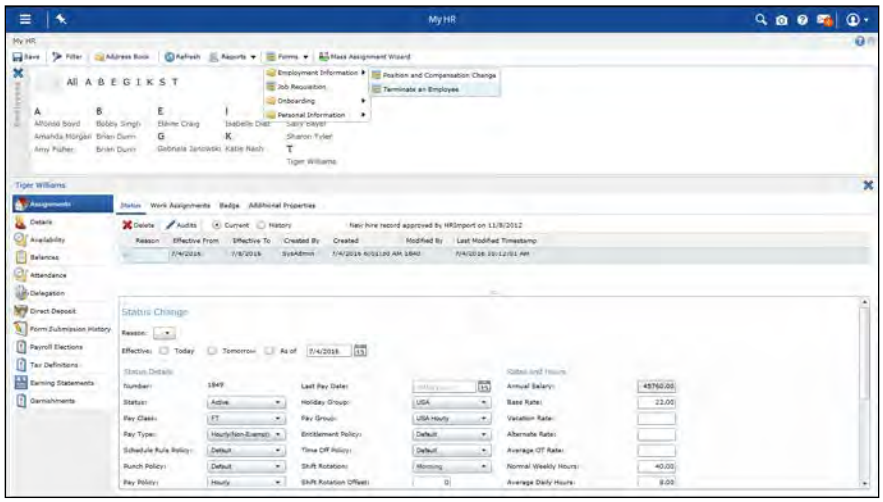
Scenario
Tiger Williams has been dismissed.

Submit a Termination form.

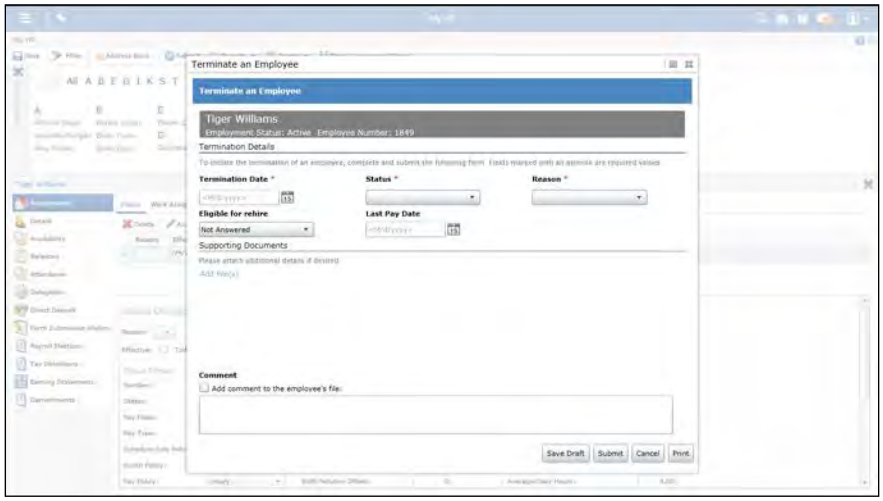
Step	Action
1.	Load Tiger's employee record and open the Termination form Click the Menu button.
2.	Click the My HR button. 
3.	Click the Tiger Williams link.
4.	Click the Forms tab.



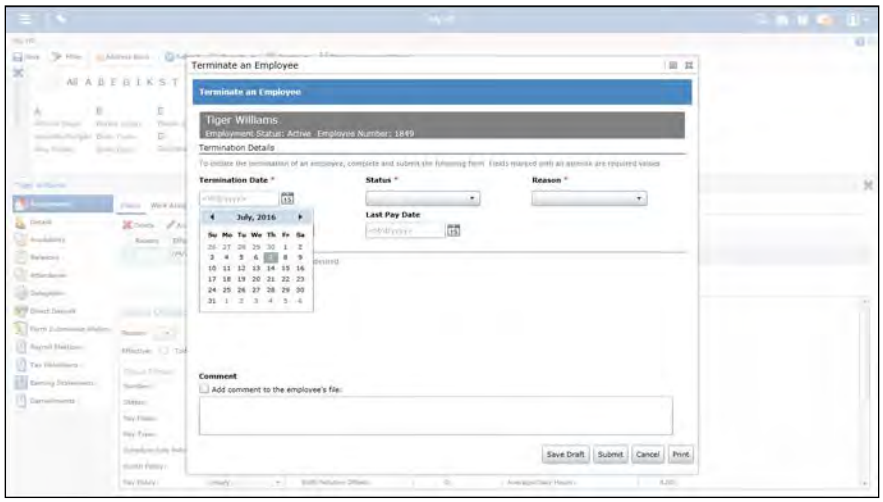
Step	Action
5.	Click the Employment Information menu. 



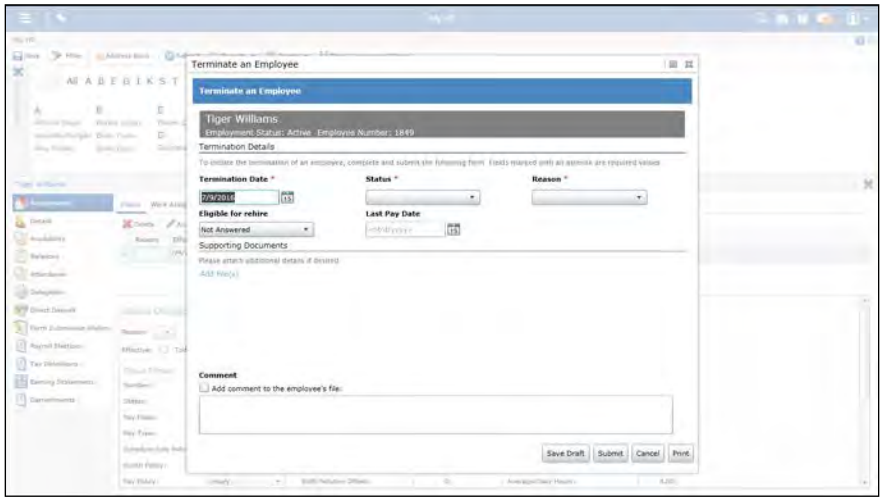
Step	Action
6.	Click the Terminate an Employee list item. Terminate an Employee



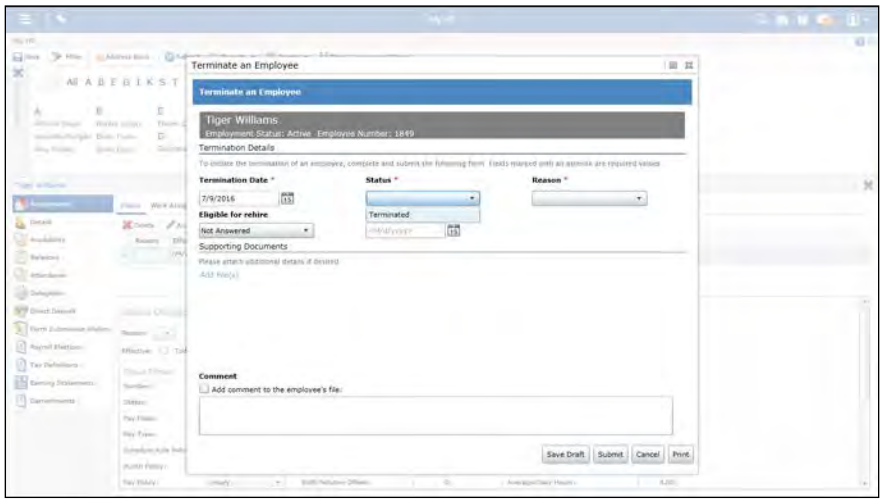
Step	Action
7.	Select the date Tiger was dismissed Click the Show Calendar button.



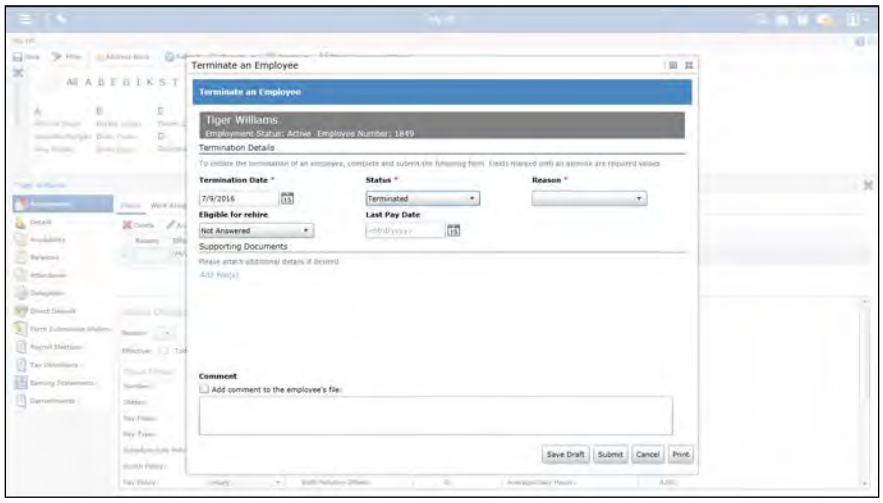
Step	Action
8.	Click the Saturday July 9, 2016 button. 9



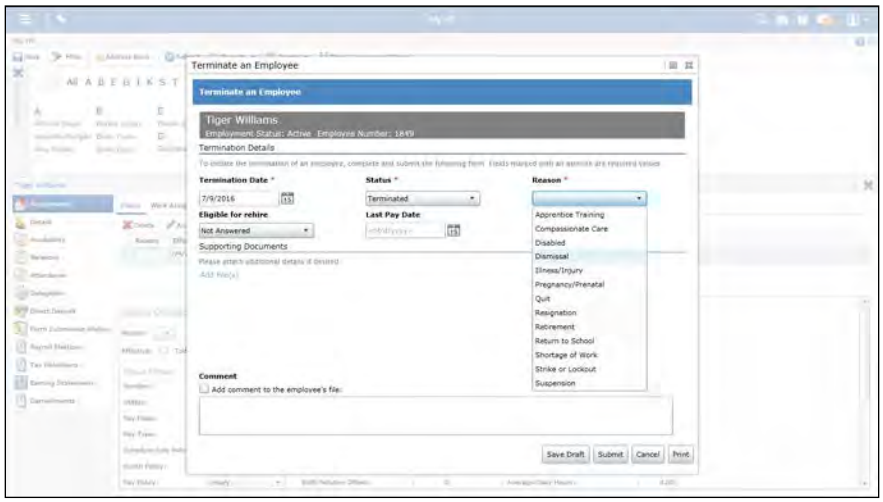
Step	Action
9.	Enter Tiger's termination status, reason, and eligibility for rehiring Click the Status list.



Step	Action
10.	Click the Terminated list item. Terminated



Step	Action
11.	Click the Reason list.



Step	Action
12.	Click the Dismissal list item. Dismissal
13.	Click the Eligible for rehire list. Not Answered ▼
14.	Click the No list item. No
15.	Click the Submit button. Submit
16.	You've successfully off-boarded Tiger Williams! Tiger has now been unfilled from any scheduled shifts, provided with an effective end date to his benefits, and is locked out of his user account.
17.	End of Procedure.

Attaching files to an employee record.

Managers can add documents (DOC, PDF, HTML) that are associated with a specific employee. Types of documents a manger might add are marriage certificates, performance reviews, and birth certificates.

After completing this lesson, you'll be able to:

- Upload a document and attach it to an employee record

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Aaron Lee
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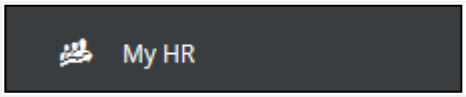
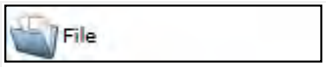
aaron.lee@ceridian.com

Procedure

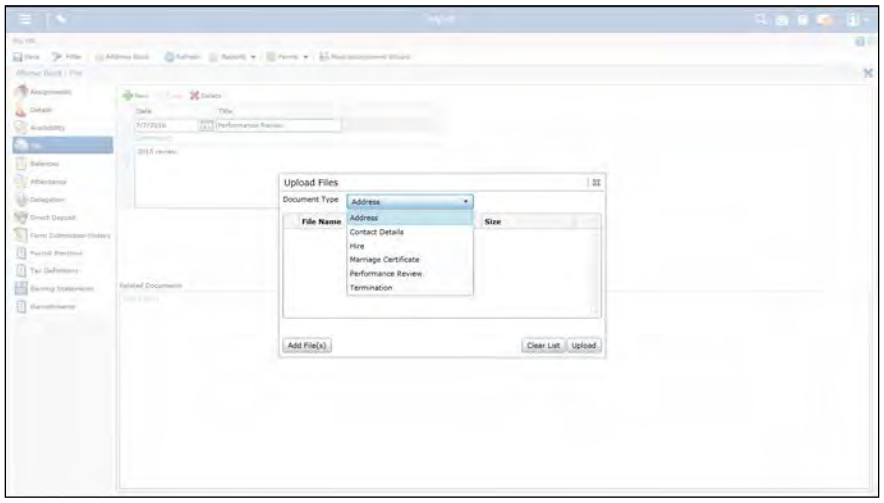
Scenario
Your employees were just given their annual performance reviews.

Attach Alfonso Boyd's performance review to his employee record as a DOCX file.

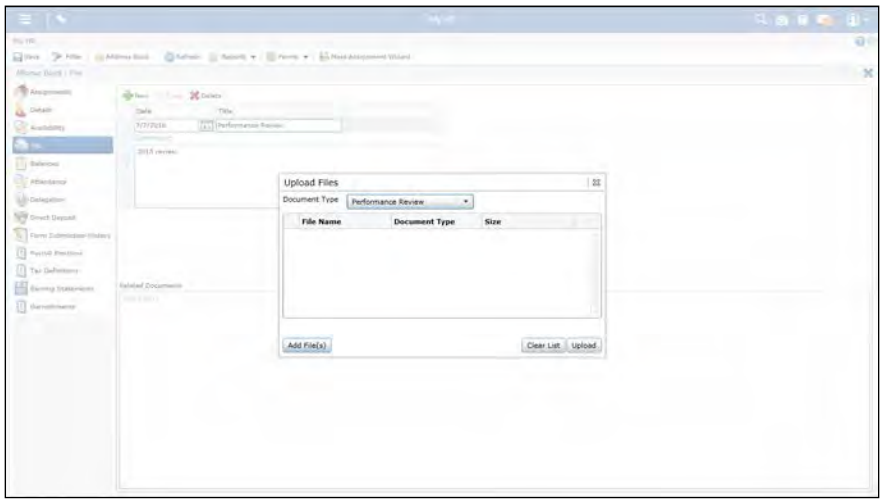
Step	Action
1.	Adding documents to an employee record involves two parts First you'll add a new file and then you'll attach a document to it.

Step	Action
2.	Load Alfonso Boyd's employee record Click the Menu button.
3.	Click the My HR button. 
4.	Click the Alfonso Boyd link.
5.	Attach a document to his employee record Click the File button. 
6.	Add a new file Click the New button.
7.	Name the file Click in the Title field.
8.	Enter the desired information into the Title field. Enter "Performance Review".

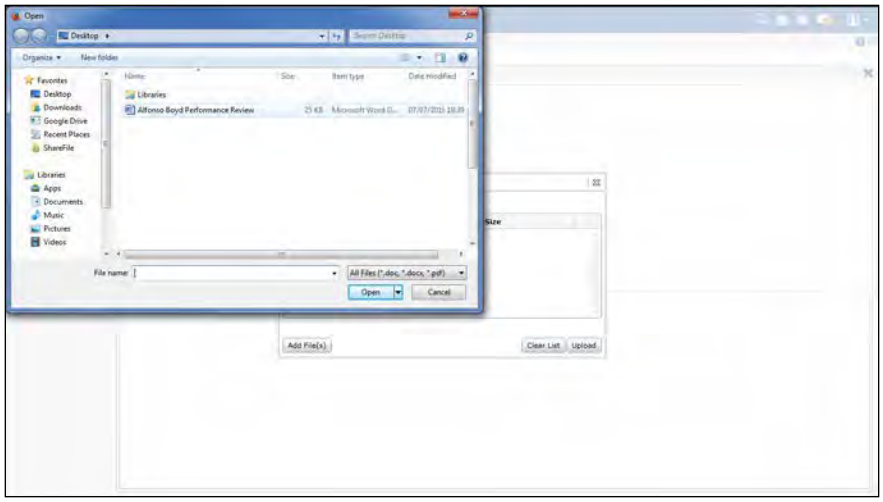
Step	Action
9.	Add a Comment You need to add a details in the Comment field in order to Save. Click in the Comment field.
10.	Enter the desired information into the Comment field. Enter "2015 review".
11.	Save the file Click the Save button.
12.	Next, attach the document to the file Click the Add File(s) link.
13.	Select the Document Type The document you upload will belong to this Document Type. It will inherit these properties and security settings. Click the Document Type menu.



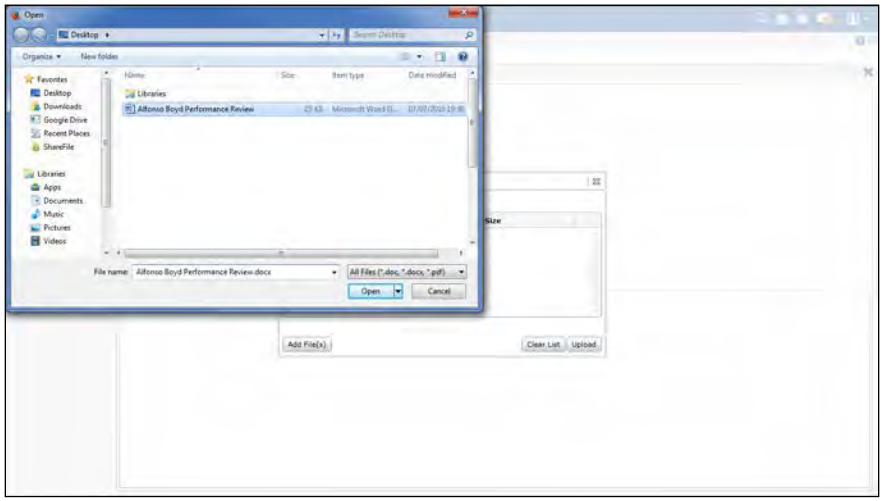
Step	Action
14.	Click the Performance Review list item. Performance Review

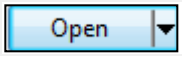


Step	Action
15.	Locate and upload the document This is where you'll find Alfonso's performance review on your computer and upload it to Dayforce. Click the Add File(s) button. Add File(s)



Step	Action
16.	Open the document Click the Alfonso Boyd Performance Review.docx list item. Click the scrollbar.



Step	Action
17.	Click the Open button. 
18.	Click the Upload button.
19.	You successfully attached a file to an employee record You can associate as many documents as necessary with each employee file record; by default, DOC, DOCX, PDF, HTML, and HTM file types can be associated with employees' files.
20.	Save the attached document Click the save button.
21.	End of Procedure.

Please refer to: https://mypathprod.dayforce.com/teamrelate-8-49-teamrelate-for-managers

Please refer to: https://mypathprod.dayforce.com/teamrelate-8-49-teamrelate-for-recruiting

Please refer to: https://mypathprod.dayforce.com/teamrelate-8-49-teamrelate-for-performance

TeamRelate in Dayforce for managers

Using TeamRelate, you can see your employee's TeamRelate profile and their current mood and engagement levels if they check-in. TeamRelate also provides you with recommendations on how to effectively communicate with your employees based on their communication styles and core convictions.

After completing this lesson, you'll be able to:

- Check an employee's TeamRelate profile.
- Check recommendations that TeamRelate provides to help communicate with an employee.

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***

Narrated by Aaron Lee
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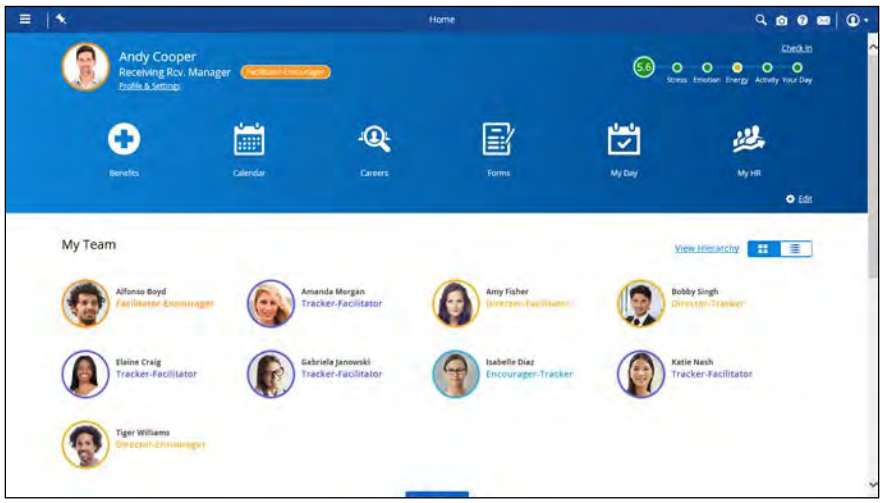
For more information on the new TeamRelate feature, please review Item #103809 in the 8.49 Release Notes.

Procedure

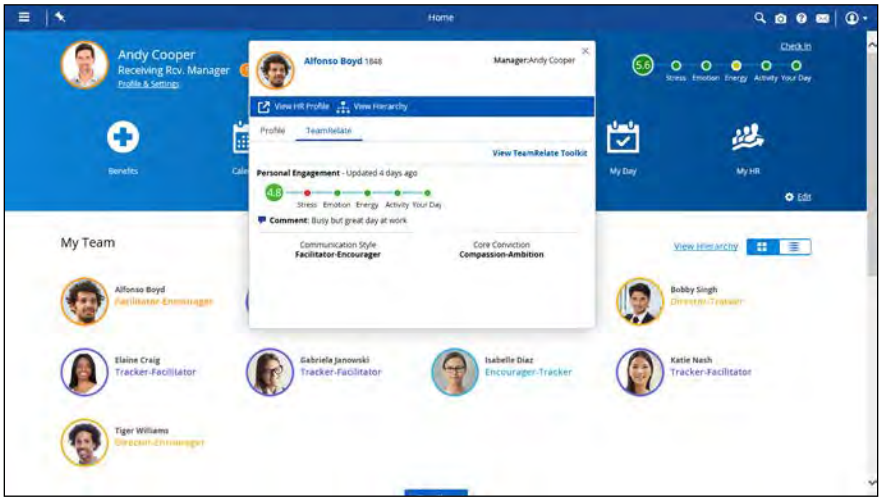
Scenario
In this lesson, you'll review Alfonso's TeamRelate profile to learn tips on how you can communicate and work effectively with him.

Step	Action
1.	TeamRelate profiles You can access your employee's TeamRelate profile by clicking on their name under My Team. The colored circle around each employee's profile picture reflects their communication style based on the answers they gave on the TeamRelate survey. You can only see TeamRelate profile information from employees that directly report to you.

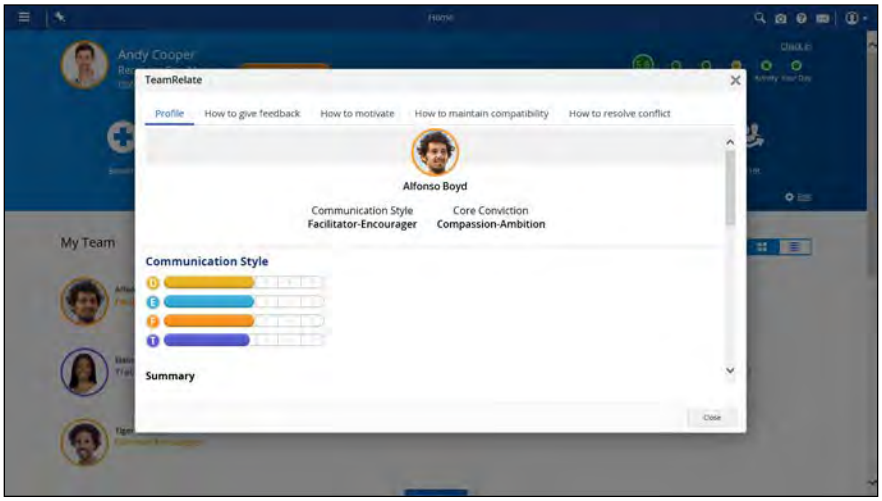


Step	Action
2.	View Alfonso's TeamRelate profile Click in the Alfonso Boyd field.
3.	Click the TeamRelate tab. TeamRelate

Step	Action
4.	Current mood and engagement scores You can see Alfonso's current mood, communication style, and core conviction. Alfonso's personal engagement scores are based on when he last checked in. In this example, this was last updated 4 days ago.



Step	Action
5.	View Alfonso's TeamRelate Toolkit Click the View TeamRelate Toolkit button. **View TeamRelate Toolkit**

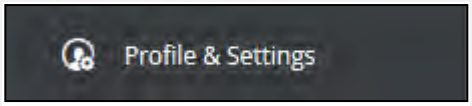


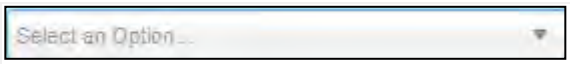
Step	Action
6.	Scroll down
7.	TeamRelate profile summary The TeamRelate toolkit provides a summary of Alfonso's communication style and core conviction. This information gives you a general idea on how Alfonso communicates and insight into why he does what he does.
8.	TeamRelate "How to..." sections Each "How to" section gives recommendations on how to give feedback, motivate, maintain compatibility, or resolve conflict for an employee depending on their communication style and core conviction. This information would be helpful to review before meeting with Alfonso. For example, if you're having a difficult conversation with Alfonso you could use the how to resolve conflict section.
9.	This concludes TeamRelate in Dayforce for managers In this lesson, we looked at how you can review an employee's TeamRelate profile. Use TeamRelate and review each of your employee's TeamRelate profiles to see recommendations on how you can work and communicate with them.
10.	End of Procedure.

Please refer to: http://mypathprod.dayforce.com/delegating-your-role

Procedure

Scenario
In this example you'll delegate your role to Alfonso Boyd while you're away.

Step	Action
1.	First, display the Profile & Settings screen This is where you'll delegate your role. Click the Menu button.
2.	Click the Profile & Settings button. 
3.	Next, open the Preferences tab Click the Preferences tab.
4.	Add Delegation Access This allows an employee to perform your responsibilities while you're away. Click the Add button.

Step	Action
5.	Select who you will delegate your role to The Give Access To drop-down allows you to select the person you want to delegate your role. Click the Give access to menu. 
6.	Click the Alfonso Boyd list item.
7.	Select the reason for this delegation The Delegation Reason drop-down explains why the employee is being assigned your role. Click the Delegation Reason menu.
8.	Click the Away list item.
9.	Select the start and end dates of this delegation The Effective Period fields set the days the employee will have access to your role. Click the Start Date button.
10.	Click in the February 8, 2016 field.
11.	Click the End Date button.
12.	Click in the February 12, 2016 field.

Step	Action
13.	Restrict Private Information Restricting private information access will hide your pay information and PII documents from the person gaining access. Clear the check boxes and the user with delegated access has full access to your pay information and PII documents. When Alfonso logs in between the effective dates he'll be asked if he's logging in as himself or you. If he selects your account, he'll be able to manage your employees, schedules, and timesheets and any other areas you normally manage. However, he won't be able to see your pay information or PII documents.
14.	Click the Pay Information option.
15.	Save your changes Click the Save button.
16.	You've successfully delegated your role to Alfonso Before this lesson concludes let's review what Alfonso when see when he logs into Dayforce when the delegation is active.
17.	Alfonso's Login Screen When Alfonso logs during the delegation he'll be asked if he's logging in as himself or you. If he selects your account, he'll be able to manage your employees, schedules, and timesheets.
18.	End of Procedure.

Managing HR incidents.

Dayforce helps managers report health and safety incidents in the workplace. Using the Safety & Health form you can quickly and accurately note what incident occurred, who it affected, and what corrective action was taken.

After completing this lesson, you'll be able to:

- Access the Safety & Health form
- Complete and submit an incident report

To review the demo:

1. Complete the full-screen interactive training video: ***Try It!***
2. Then complete the quiz: ***Know It?***

Narrated by Aaron Lee

eLearning Developer

Toronto, Ontario

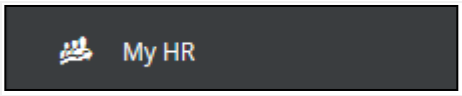
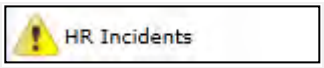
aaron.lee@ceridian.com

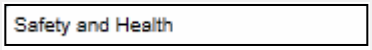
Procedure

Scenario
Your employee, Alfonso Boyd, was injured at work.

Create a new HR incident and add in the new information to document the incident. Once you're finished save to create a record of this event.

Step	Action
1.	Open Alfonso Boyd's employee record The My HR screen provides you with access to employee records and forms. Click the Menu button.

Step	Action
2.	Click the My HR button. 
3.	Click the Alfonso Boyd link. Alfonso Boyd
4.	Click the Close button.
5.	Open the HR incidents tab Health and safety incidents are recorded on the HR Incidents tab. Click the HR Incidents tab. 

Step	Action
6.	Add a new incident Click the New button.
7.	Select Incident type Health and safety incidents record work-related employee injuries or illnesses Click the Incident Type list.
8.	Click the Safety and Health list item. 
9.	Specify the date the incident occurred Click the Show calendar button.
10.	The incident occurred on July 1st, 2016 Click the Date button.
11.	Specify that the incident occurred at Plant 1 Use the Incident Location drop down menu to document where the injury took place. Click the Location list.
12.	Click the Plant 1 button.
13.	Click the OK button.
14.	Specify when Alfonso started working and when he got hurt Click in the Time Began Work field.
15.	Enter the desired information into the Time Began Work field. Enter "9a".

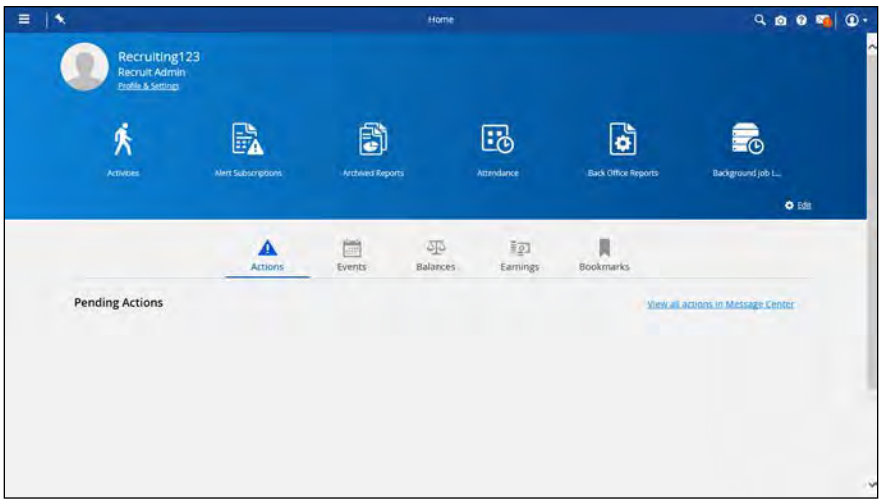
Step	Action
16.	Click in the Time of Event field. 12:00 AM
17.	Enter the desired information into the Time of Event field. Enter "12p".
18.	Scroll down.
19.	Select the Injury or Illness Type Click the Injury or Illness Type list.
20.	Indicate that Alfonso was injured at work Click the Injury list item. Injury
21.	Note that Alfonso cut his ear The Injury drop down menu contains a number of common workplace injuries you can choose from and the Body Part drop down menu helps pinpoint where the injury occurred on the employee. Click the Injury list.
22.	Click the Cut list item. Cut
23.	Click the Body Part list.
24.	Click the Face Ear (1) list item. Face - Ear (1)
25.	Record that Alfonso was harmed in the wind turbine Use the Actions that Caused the Incident field to provide a brief description of how the employee was injured. Click in the Actions that Caused the Incident field.
26.	Enter the desired information into the Actions that Caused the Incident field. Enter "Accident with the wind turbine".

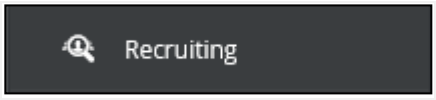
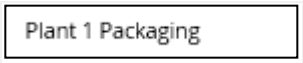
Step	Action
27.	Save your changes Click the Save button.
28.	You have successfully submitted a Safety & Health incident type for Alfonso's workplace incident It's now documented in Dayforce HCM that Alfonso cut his ear while working in the wind turbine. If you need to reference this incident down the road you can review Alfonso's HR Incidents history to retrieve these details.
29.	End of Procedure.

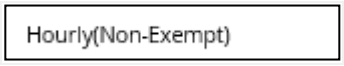
Please refer to: http://mypathprod.dayforce.com/building-a-job-requisition

Procedure

Scenario
You are the hiring manager/recruiter at your location and you need to hire a new Packaging Packager.



Step	Action
1.	Create a new job requisition in Recruiting Access the Job Requisitions screen. Click the Menu button.
2.	Click the Recruiting button. 
3.	The Job Requisitions section This section is the main area for viewing and managing job requisitions along with the candidates for each position.
4.	Create a new job requisition Click the New button.
5.	A new Job Requisition form appears The form is divided into five sections: Let's fill in all of the required fields for all five sections, beginning with General.
6.	Add a job requisition title Click in the Job Requisition Title field.
7.	Enter the desired information into the Job Requisition Title field. Enter "Packaging Packager".
8.	Status and Request Date are automatically set Since this is a new job requisition, the status is automatically set to "Open" and the day that this requisition is being requested is set to the current date.
9.	Add a location Click the Location menu.
10.	Click the Plant 1 Packaging list item. 

Step	Action
11.	Position Title selection automatically filters When the location is selected, Position Title is filtered to only let you select positions that are available at the chosen location.
12.	Justification For Request and Reason for Opening are optional If you'd like, you can justify and give a reason as to why this job requisition is being created. This can be useful if any reports need to be run against job requisitions.
13.	The Evergreen feature If evergreen is checked, job requisitions and job postings stay continuously open so that candidates can continue to apply. This is useful if you are recruiting for positions with high turnover or frequent openings.
14.	Complete the Position Details section Now that you've completed the general details, let's complete the position details section. Click the Next button.
15.	Click the Pay Class menu.
16.	Click the FT list item.
17.	Click the Pay Type menu.
18.	Click the Hourly(Non-Exempt) list item. 
19.	Click the Pay Group menu.
20.	Click the US Hourly list item.

Step	Action
21.	Go to the Job Details section Click the Next button.
22.	Job Details section These fields are pre-populated based on the information you selected in the General and Position Details sections.
23.	Go to the Job Description section Click the Next button.
24.	Add a Job Description This will be the description the candidates will see. For this lesson, the job description will be added for you. Click in the Job Description field.
25.	Go to Additional Notes Click the Next button.
26.	Additional Notes If you have any additional notes you'd like to add to the job requisition, you can do it here. These notes can't be seen by candidates and are only visible to users who have access to the job requisition. There aren't any notes you'll be adding to this job requisition so let's save the job requisition.
27.	Save the Job Requisition form Click the Finish button.
28.	You've successfully created a job requisition! HR will review your job requisition to determine if and when it should be posted. Once it's been reviewed, a job posting will be created for the job requisition and candidates can start applying for the position.
29.	End of Procedure.

Recording dockets against a shift.

Dockets capture quantifiable work. For example, after producing a number of items on an assembly line or cleaning a number of hotel rooms you can walk up to a Dayforce clock, choose the docket, and enter the quantity.

Dockets help organizations budget and plan but can also be used to compensate employees. For example, an employee could receive an extra fifty cents for each assembled unit produced in a manufacturing plant.

Employees should be entering dockets at the clock. Otherwise, you'll need to enter it for them on My Timesheets.

After completing this lesson, you'll be able to:

- Record time against dockets
- Change an employee's position on the timesheet
- Verify how pay is impacted from changes on the timesheet

To review the demo:

1. Complete the full-screen interactive training video: *Try It!*
2. Then complete the quiz: *Know It?*

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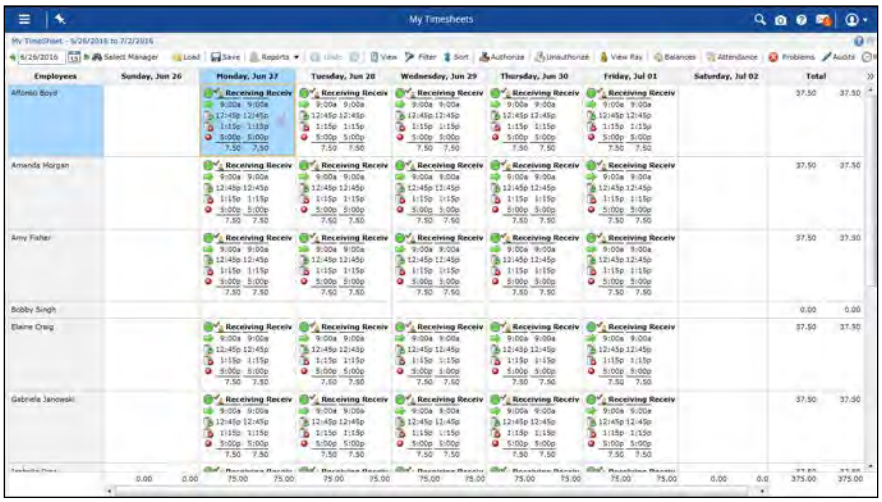
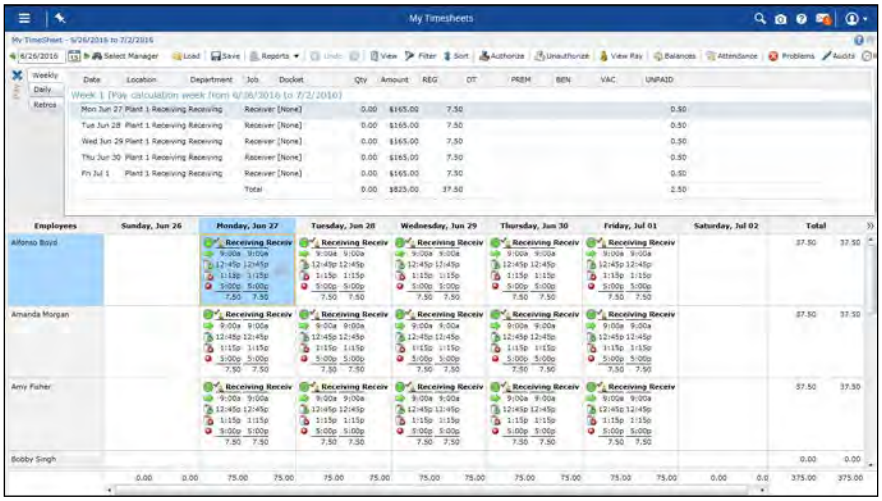
Procedure

Scenario
Alfonso made 90 Shoelaces on Monday. Record this production on his shift using dockets.

Step	Action
1.	Open My Timesheets You'll record dockets on the timesheet. Click the Menu button.
2.	Click the My Timesheets button.
3.	Select Alfonso's Monday shift and display his pay information for that day Certain dockets can affect pay. Opening the Pay panel will allow us to show their impact on pay as we enter them onto the timesheet. Click the Shift.

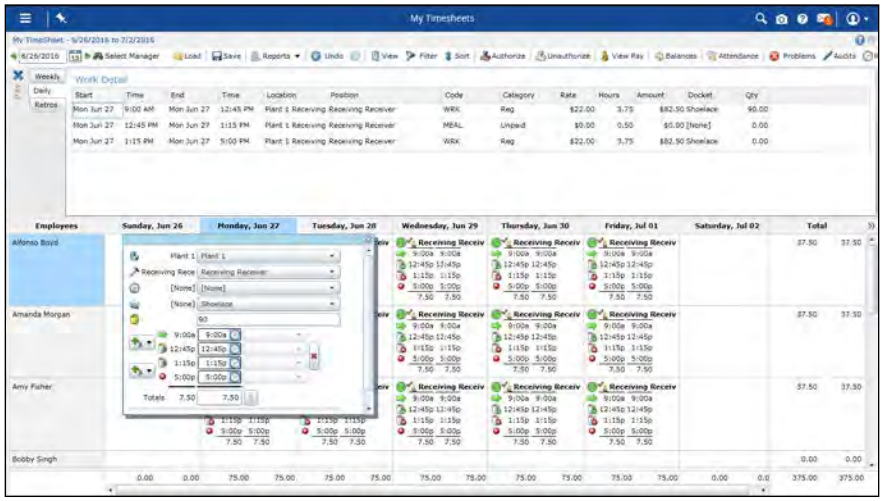


Step	Action
4.	Click the View Pay button.



Step	Action
5.	View Alfonso's daily pay Change the View Pay panel from weekly information to daily. Click the Daily tab.

Step	Action
6.	Alfonso will be paid a premium for each docket Currently Alfonso's pay only reflects his work and meals. Because each shoelace processed earns the employee a premium, we'll see it reflected in his pay as it's entered.
7.	Indicate that Alfonso processed 90 Shoelaces on Monday Click the Edit Shift button.
8.	Select the docket Specify the type of docket he was working on. Click the Dockets list. [None]
9.	Click the Shoelace list item. Shoelace
10.	Click the Close button. Close
11.	Click in the Piece Quantity field.
12.	Enter the desired information into the Piece Quantity field. Enter "90".



Step	Action
13.	Click the Close button.
14.	You've successfully recorded a docket and pay information will automatically be updated Alfonso is now earning a docket premium additional.
15.	Save your changes Click the Save button.
16.	End of Procedure.

Please refer to:
https://docs.google.com/forms/d/1ZhCOvpkTZBHImknEDbBs05LRp7uDYV43uQBozqr1TMY/viewform?entry.277433827=Manager+Training+-+Dayforce+HCM+8.50&entry.1445425905&entry.1530013914&entry.15793576&entry.95056822&entry.513161413&entry.486120590&entry.1547892055&entry.288159109&entry.838412557