DayForce Cheat Sheet

I. MY SCHEDULES

a. **Entering the same schedule for the entire week:** Highlight entire row first, then click the PLUS sign. Enter the schedule as needed, click outside the box

b. **Entering the same schedule for multiple, non-consecutive days**: Hold CTRL each of the days you'd like to enter the shift on, click the plus sign. Enter schedule as needed, clock outside the box

c. **Copying schedules week to week**: use the LOAD option to navigate to a future week, click the drop down arrow for GENERATE and clock COPY WEEK. In the Copy screen you will see the "Copy week of" field defaults to the prior week. Here you can choose to copy schedules for a specific days of the week if you choose to.

   VERY IMPORTANT - To copy only your jobs/department:

   1. Click the **"View Filters"** link, and "ADD FILTER"
   2. Check the box for Name, Zone, and Scheduled jobs and click "Update"
   3. In the "Zone" field use the selector to choose your department
   4. in the job "scheduled job(s)" field use the selector to select the specific jobs you would like to copy
   5. Click Apply
   6. Select Copy Week menu from the "Generate" drop down, select the week you would like to copy, and click the Copy button.

d. **Reports available:**

   1. Schedule Cost for Forecasting – SOP Provided
   2. Printed Schedule report – provides a printable schedule based on the parameters selected

II. MY TIMESHEETS

a. **Calendar settings**: using the load drop down arrow, you can view the entire pay period for a specific pay group or view them week by week.

b. **Using filters:** By clicking the FILTER & SORT MENU, you can filer the timesheet view in multiple ways. All icons will provide their meaning when hovering over them. You may add additional filter options by clicking the "Add Filter" on the bottom right of the filter menu

c. Review "Managing Exceptions sheet" to understand the exceptions/warnings

d. Review and "Authorize" timesheets regularly, preferably dayly

e. **Helpful Reports Available:**

   i. Approaching FT – will provide average hours for employees reaching a specific cutoff " currently set to 30 hours
   ii. Employee Punch – provided employees raw punch details. Only will provide data if employees actually clock in/out, not when they manual enter on the timesheet
   iii. Pay Summary Classes – for dockets, provided total number of classes for selected time period
   iv. Pay Summary – SOP provided
   v. Punch Exception - provide list of all employees with exceptions, with ability to apply filter to see a specific exception "ex. In early"
   vi. Schedule vs. Actual – compares scheduled hours with actual hours

f. **Reports for Execs:**

   i. Exempt Salary Pay Summary
   ii. Pay Summary by Department and GL – Jessica will provide SOP

III. MY DAY

a. **Time off Request Manager**
   i. This is where you will approve any time off requests (PTO, SICK, Bereavement, Jury Duty, etc.)
   ii. Green Check will automatically approve
   iii. Red X will deny the PTO
   iv. Use the "LOAD" folder icon to filter results – allows you to view past requests for a specific time or employee

b. **Pay Approve Check List**
   i. This is the final stage in approving timesheets/payroll before I begin processing
   ii. All timesheets must be reviewed and **authorized** before you can sign off and lock the Pay Approve Check List
   iii. For shared employees, managers will have to wait until all timesheets have been authorized by all managers before locking payroll

IV. MY HR

a. Use to review employee records:
   i. **Assignments:**
      1. **Status tab provided**: Status, class, base rate, primary department, job and manager
      2. **Work Assignments**: shows all jobs assigned to the employee along with their rates, and multiple manager listing (if any)
   ii. **Details:**
      1. Employee profile: provides all employee information in a snapshot
      2. Personal details
      3. Contact info
      4. Emergency contact
   iii. **File:** will be used to save important document for manager access
      1. Fingerprinting
      2. CARI
      3. Mantoux
   iv. **Balances:** Actual Balances: provided current value of employee PTO Balances
   v. **Employee Earning Statements**

b. **Reports Available:**
   i. Active employee list with GL
   ii. Emergency Contact Report
   iii. Employee Balance report
   iv. Employee Detail report: can be used to select difference columns of information you'd like to pull
   v. Employee Work assignment rates by location: provides work assignment rates as of the selected date, can be filtered by position

c. **Forms Section:**
   i. **Hiring -> Job Requisition**
      1. This is where you would submit the job requisition to start the recruiting process for a new position or replacement
      2. All fields with an asterisk are required
      3. Please also be sure to include your justification for the request as well as the Recruiter (your designated HR Generalist)
      4. You may provide any additional notes for your direct supervisor to review upon approval
      5. Once submitted this will get routed accordingly to the correct approvers:
         a. Your direct manager, the Branch Exec, and Ed Phillip COO
      6. Once final approval from Ed is received HR will receive notification of the new job req.

V. RECRUITING

Here is where you will manage your existing job requisitions and applicants

a. **Overview** will show you a graph of total applicants and the source of where they applied
b. **Job Requisitions**
   i. Provides the list of existing job requisitions and their status (Open, Closed, Cancelled)
   ii. You may use the filters to see specific job reqs, only open job reqs, or search by title or ID
   iii. By clicking on the job requisition title it will open the details of that specific job req
      1. The first tab will show you a list of candidates/applicants. This is where you will manage your progress with each applicant and update this accordingly.
      2. By clicking on the Candidates name this will open the application and resume details for the candidate
      3. You can close the applicant information by clicking on the GREY X on the top right of the screen, or you may move onto the next applicant using the BLUE arrows in the top center of this screen.
      4. There are several status stages available from “initial screen” to the “offered” stage than can be applied to each candidate.
      5. You can also assign the applicant to another job if you see a good fit.
      6. You can add any additional notes using the Notes option for future reference and to share information with HR.
      7. The final stage would be to create the offer letter by selecting the employee to be hire and using the “Offer” option. This will open a new window with default offer letter templates. Be sure to select the correct option LOAD and edit the letter accordingly. The workflow will require HR Approval after submission.
      8. The applicant will then move through the ONBOARDING process accordingly.