CERIDIAN

Android App Guide

Release 55, Service Pack 2

Contents

Getting Started

Once the Dayforce application has been configured to support the Android mobile application, users need to perform setup on their mobile device. This process includes Downloading the Application, Configuring the Application and Logging In.

This section provides instructions on:

App Security

Before you Begin:

To access the mobile app, you need to have the following:

- Dayforce credentials, if applicable.
- Single Sign on (SSO), if applicable.
- Mobile features enabled for your role. (A mobile user can only access mobile features that have been enabled for that role).

The app does not store information on the device with the exception of:

- Company ID.
- Username.
- A draft message that is not sent because the phone loses connectivity will be stored until the next login.
- A list of the viewed coach marks (the app's internal visual help system for new features).

When the app's data is running, it is protected by the device's architecture and app storage. Data is not encrypted by the mobile client.

Since the main application never trusts anything from the mobile client without taking extra security measures, all communication from the app to the main application is authenticated by the main application and the verified data.

The mobile client is subject to the same session duration as the main application. Therefore, if the app is left idle for a long period of time the application terminates the session, requiring you to log back in.

Accessing Features

This guide describes all of the mobile features that are available through Dayforce; the features you can access on your mobile device depend on how your organization uses the application, and the features and sub-features that have been assigned to you.

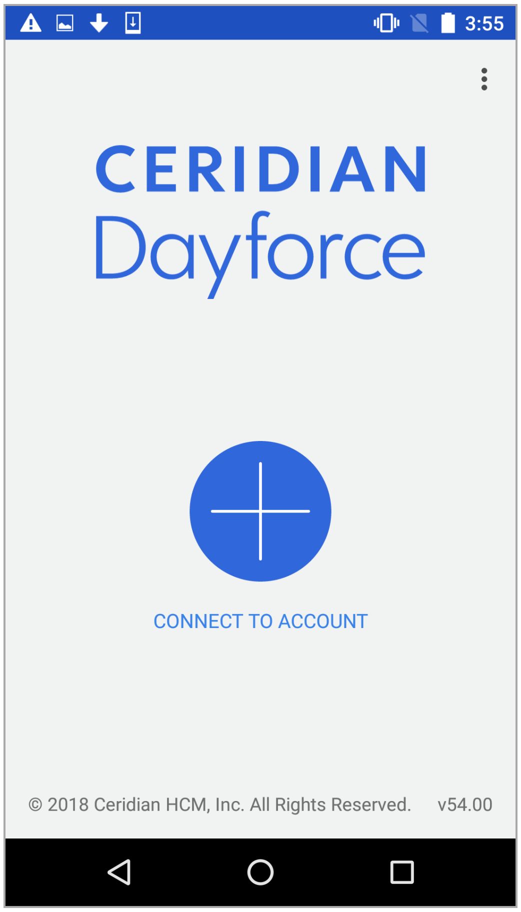
Configuring the Application

To configure the application for its first use:

1. Tap the Dayforce icon to launch the application on your mobile device

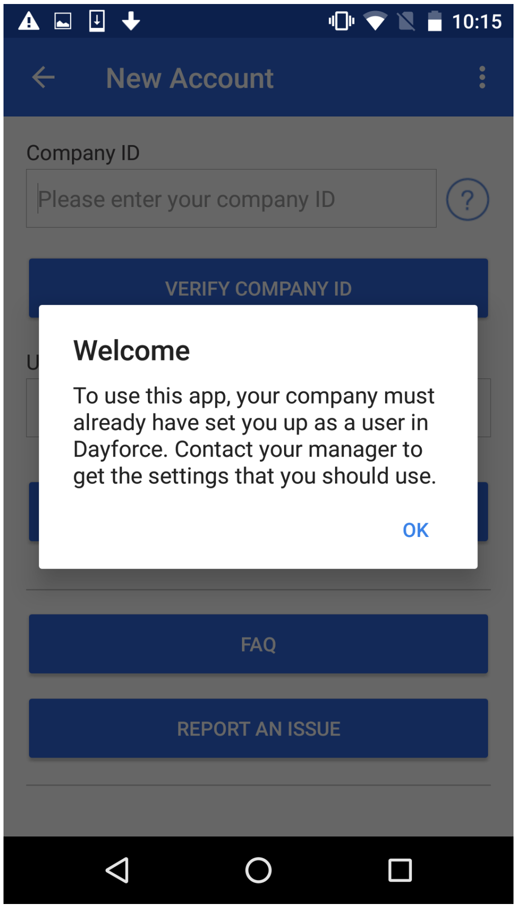
   The application displays the screen to connect to an account.

2. Tap **Connect to Account**:



The **Welcome** screen is displayed.

3. Tap **OK** to close the **Welcome** screen:



4. Type the **Company ID** you normally use to access the main Dayforce application into the text field.
5. Tap the **Save and continue** button.

   Note: To reopen the **Settings** screen after first login, in the main login screen, open the context menu and tap the **Settings** option. For more information about how to open the context menu, refer to **Context Menu** on page 10.

Add an Account for Default Single Sign-On

You have the option to allow the app to only display the SSO (single sign-on) login method if you do not use native authentication (username and password) to log in to the app. Previously, the app displayed both SSO and native authentication options for logging into the app, which caused a bit of confusion. Now, the app can be configured to only display the SSO login method, which gives you an easier login experience.

Setup

Disable native authentication for SSO users in the main application in **System Admin** > **Client Properties** > **General Properties** > **Disable native authentication for SSO users (excludes OData and Web Service features)**.

Mobile Account Setup

Set up an account for default single sign on by doing the following:

1. Open the context menu and tap **Manage Accounts**.
2. Tap the **Connect to another Account** button.
3. Type the appropriate **company ID**.

   Note: This is a single word no spaces.
4. In the **New Account** screen, tap **Verify Company ID**.

   The app displays an authentication dialog message to let you know that you should use your SSO credentials.
5. In the **Authentication** dialog message, tap **Ok**.

   Note: In some cases, the app displays the **Enable Dayforce Authentication** button at the bottom of the screen. An employee may need to use the native authentication method rather than SSO, for example, during onboarding or off boarding an employee may have less network access.
6. Optionally, if you select **Enable Dayforce Authentication**.

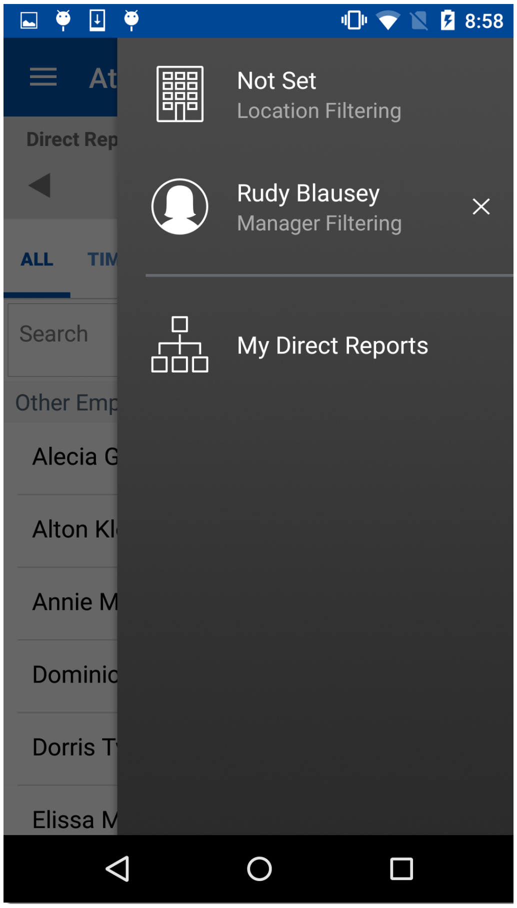
   If your organization is set up to use SSO, the app displays a message to let you know that enabling Dayforce authentication may not work for you.
7. In the **Enable Dayforce Authentication** dialog message select **Enable**.

   If enabling Dayforce authentication is successful, the app displays both SSO and native authentication login options on your account setup screen.

Context Menu

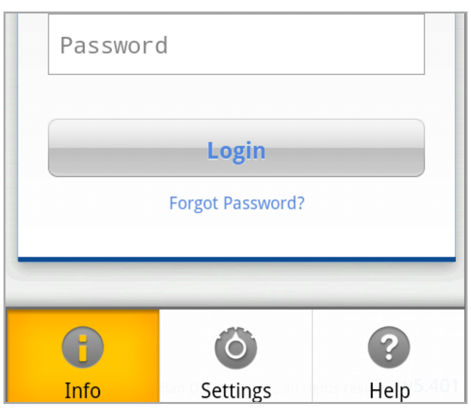
This section describes how to open the context menu, which allows you to perform various actions throughout the application. How you open the context menu depends on the type of Android device you use and its operating system version, described below:

- For devices running Android operating system version 4.0 and above that do not feature a physical hardware menu button, tap the menu icon at the top-right of the screen to open a drop-down list of available options (menu options are context sensitive and dependent on your role):



Note: Displayed menu options will vary depending on your role and feature.

- For Android devices running operating system versions below 4.0, tap the physical menu button to open a menu with icons along the bottom of the screen:

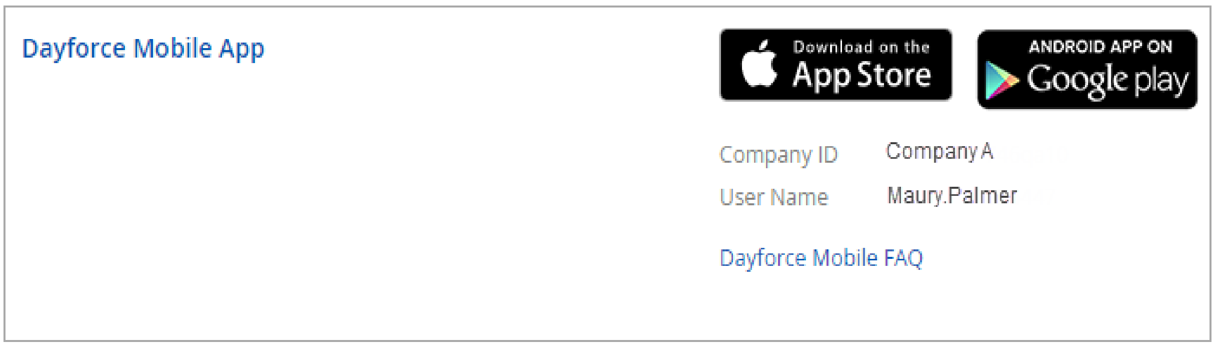


Downloading the Application

The Dayforce mobile application can be downloaded from the Android Market, which can be accessed in either of two ways:

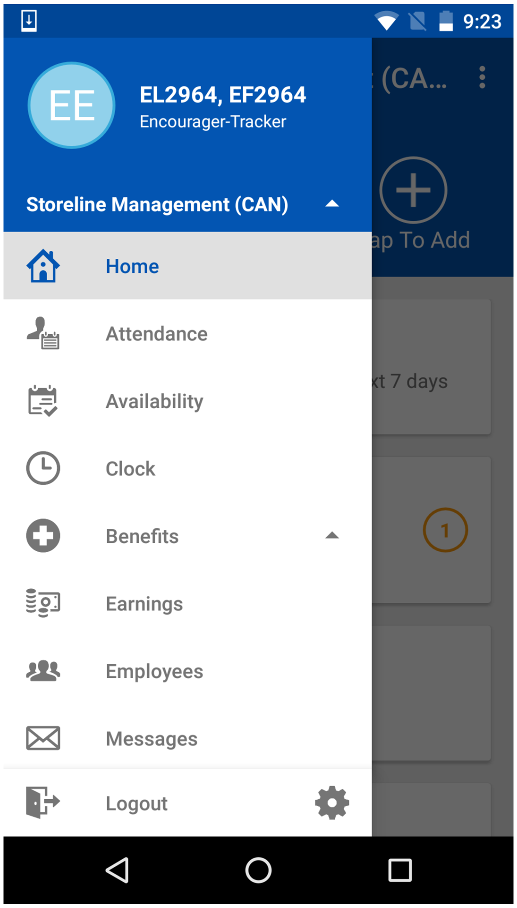
- On your computer, via the Google Play Store website at play.google.com
- On your mobile device, by opening the Play Store app.

If your organization uses the Home feature, you can also download the app using the link in the **Mobile** section of **Home > Account Settings**:

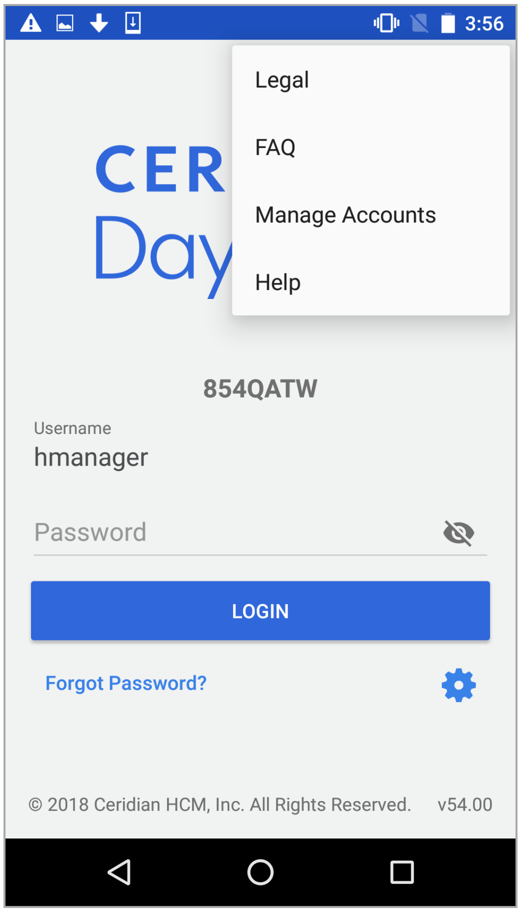


FAQ

FAQ is accessible from the settings option ( ) in the navigation menu on **Home** screen:

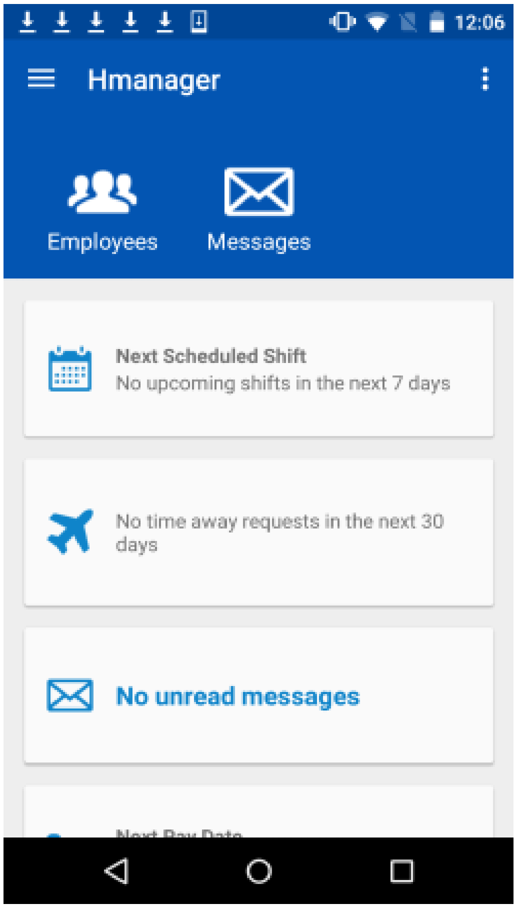


In addition, FAQ is accessible from the context menu on the login screen:



Favorites

The favorites toolbar is located on the upper part of the home page and holds up to three features. In this example, the **Employees** and **Messages** features are displayed in the favorites toolbar. Tap a feature icon on the favorites toolbar when you want to launch a feature:



Notes

- If a feature becomes unavailable for a role, then the feature icon is removed from the toolbar and no longer displayed.
- If a feature is added to a role it is not automatically added to the toolbar even if it was there previously.
- By default, the favorites toolbar is automatically populated with the first three features that are listed in the navigation menu. However, if one of those features is **Benefits** (which has sub-menu items) it will not be displayed and the quick launch lists two features. You then have the option to add sub-feature menu items to the favorites toolbar.

Edit the Favorites Toolbar

Hold and press an existing favorite feature icon to change the screen to edit mode.

Note: Your role feature access will affect which available features are displayed on the edit screen.

Add Features

Add features to the favorites toolbar by doing the following:

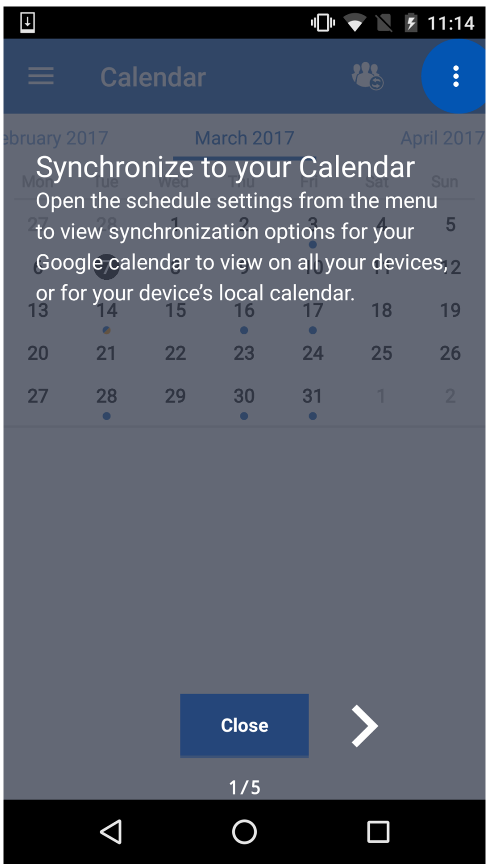
When you are in edit mode, tap the feature icon to add it to the toolbar.

Note: If the favorites toolbar is at capacity (three features) the feature that is added to the toolbar replaces an existing feature.

Note: You need to replace rather than remove feature icons on the favorites toolbar.

Coach Marks

Coach marks (also called Instructional overlays) help you to get more familiar with particular features in the mobile app, by providing tips and instructions in the user interface. The following coach mark is an example in the **Calendar** feature:



Click through the coach marks using the arrows, or close them by tapping the **Close** button.

Coach marks are displayed on the following features:

- **Attendance**
- **Employees**

- **Set Coordinates**
- **Tasks**
- **Time off List**
- **Home**
- **Widgets**
- **Calendar**
- **Schedules**
- Timesheets - Timesheet Data Validation

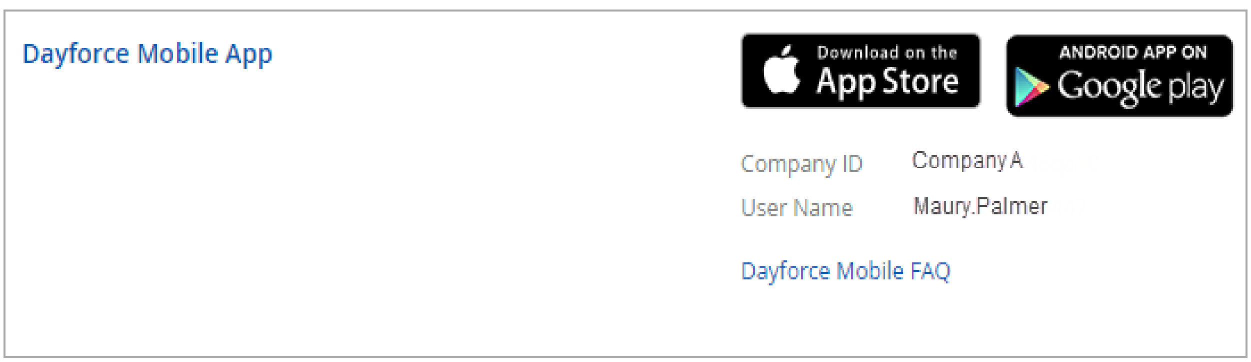
Logging In

Your organization's configuration determines how you log in to the application:

- The default login method requires a user name and password. When your organization uses this method, the app displays **Username** on the login screen.
- The single sign-on (SSO) login method requires the credentials that you use to access your organization's network. When your organization uses this method, the app displays a single **Login** button on the login screen.

Find your Login Details

If your organization has enabled the **Home > Account Settings**, you can find your login details (i.e., user name and company ID) for the mobile app in the **Mobile Application** section:



Otherwise, contact your manager or Dayforce Administrator.

Login Using your Username

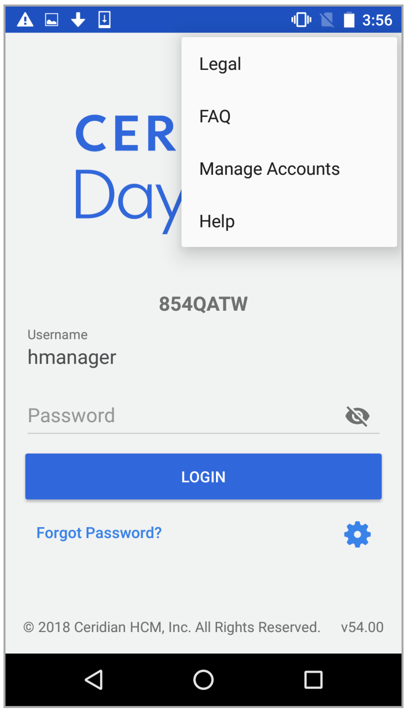
Logging into the mobile application is a very similar process to logging into the main Dayforce application.

To log in, you first need to associate the app with your user account. If you work for more than one client that uses the Dayforce mobile app, you can associate the app with each account so that you can switch between the two easily.

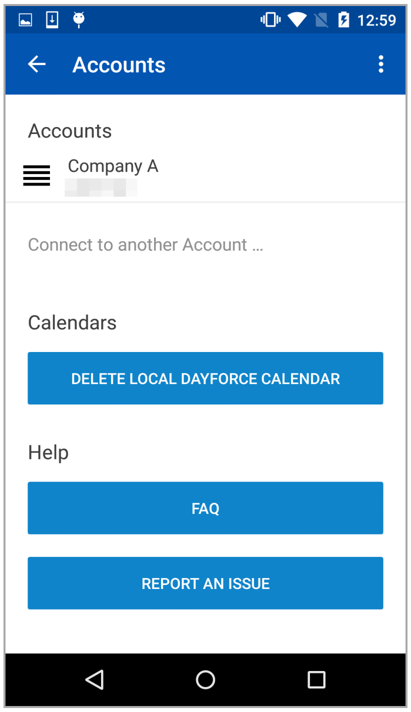
Add an Account

To add a new account:

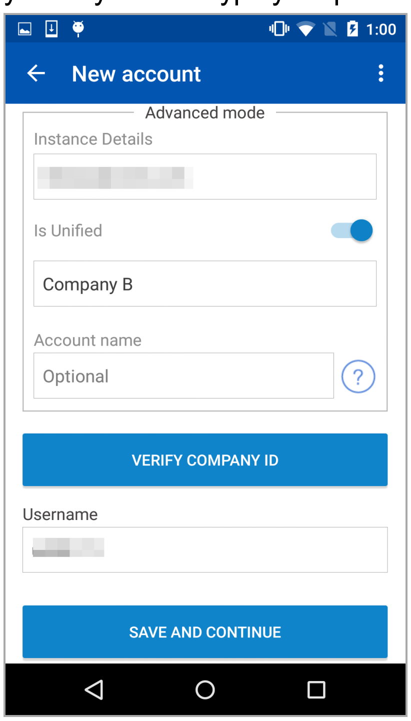
1. Open the menu and tap **Manage Accounts**:



2. Tap the **Connect to another Account** button:



3. Tap **Create New**.
4. Type the appropriate **company ID** and **user name**. The app saves your username so that you only have to type your password when you log in.



Note: The app verifies your company ID to ensure that it is valid, and that you have not typed the same value for both the company ID and user name. It displays a checkmark next to the company ID once it has been verified.

5. Tap **Save**.

Add an Account for Default Single Sign-On

You have the option to allow the app to only display the SSO (single sign-on) login method if you do not use native authentication (username and password) to log in to the app. Previously, the app displayed both SSO and native authentication options for logging into the app, which caused a bit of confusion. Now, the app can be configured to only display the SSO login method, which gives you an easier login experience.

Setup

Disable native authentication for SSO users in the main application in **System Admin** > **Client Properties** > **General Properties** > **Disable native authentication for SSO users (excludes OData and Web Service features)**.

Mobile Account Setup

Set up an account for default single sign on by doing the following:

1. Open the context menu and tap **Manage Accounts**.
2. Tap the **Connect to another Account** button.
3. Type the appropriate **company ID**.

   Note: This is a single word no spaces.
4. In the **New Account** screen, tap **Verify Company ID**.

   The app displays an authentication dialog message to let you know that you should use your SSO credentials.
5. In the **Authentication** dialog message, tap **Ok**.

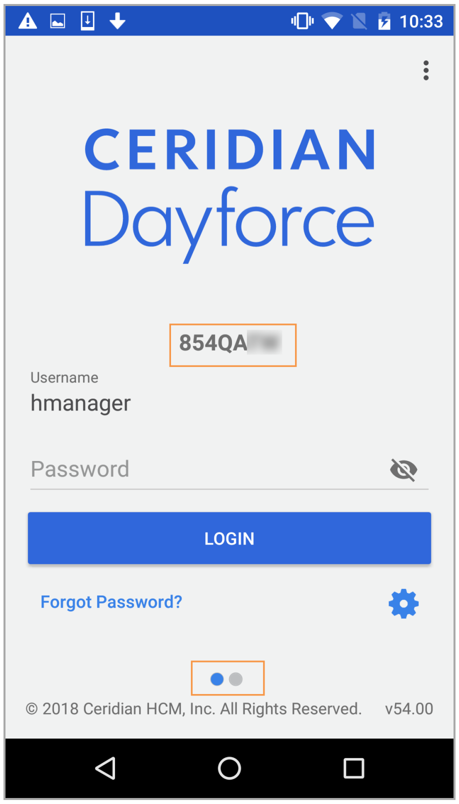
   Note: In some cases, the app displays the **Enable Dayforce Authentication** button at the bottom of the screen. An employee may need to use the native authentication method rather than SSO, for example, during onboarding or off boarding an employee may have less network access.
6. Optionally, if you select **Enable Dayforce Authentication**.

   If your organization is set up to use SSO, the app displays a message to let you know that enabling Dayforce authentication may not work for you.
7. In the **Enable Dayforce Authentication** dialog message select **Enable**.

   If enabling Dayforce authentication is successful, the app displays both SSO and native authentication login options on your account setup screen.

Account Tiles

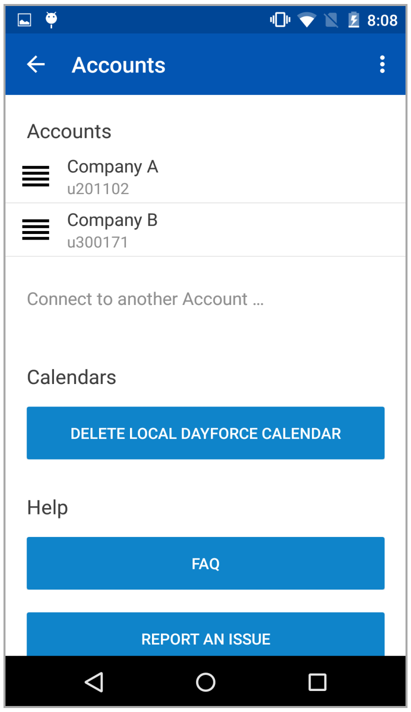
On the login screen, the app displays a dot for each account you have added. For example, if you associate the app with two accounts, it displays two dots. It also displays the Company ID above the username to indicate which account you are logging into.

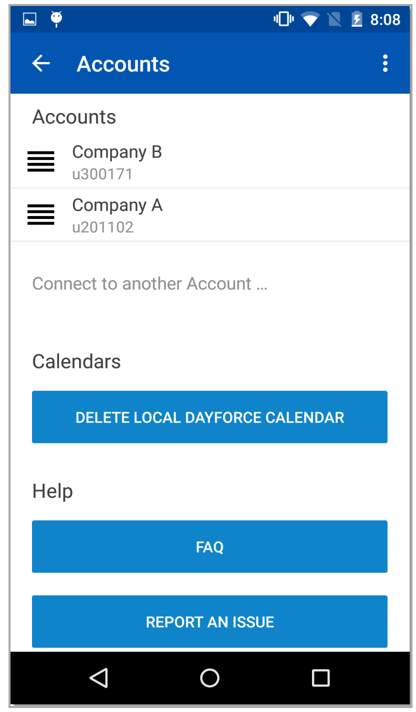


Each account is displayed on a separate "tile". You can switch between accounts by swiping across the screen to display the appropriate account tile.

To change the order of your account tiles:

1. Open the menu in the upper right and tap **Manage Accounts**.
2. Hold and drag the order of the accounts on the **Accounts** screen.
3. Tap **Accounts** to exit the screen.





Edit or Delete an Account

To edit the settings for one of the accounts:

1. Swipe to the appropriate tile.
2. Tap the icon below the **Login** button.
3. Do one of the following:
    1. To edit the account, change the necessary settings.
    2. To remove the account from your phone (for example, if you are no longer working for one of the companies), At the bottom of the **Edit Account** screen, tap the **Remove Account** button.

Log in to an Account

Once you've configured the necessary account(s), you can log in to them by swiping to the necessary tile and typing your password.

Tip: You can view the password that you've typed by pressing and holding the icon. The app only displays the password while you hold the icon.

Logging in Using Single Sign On (SSO)

Single Sign On (SSO) allows you to log in to the Dayforce app using your credentials for your organization's network, rather than having to remember another user name and password.

If your organization uses SSO, the application displays a single **Login** button on the login screen, rather than fields for user name and password.

To log in using SSO:

1. Click the **Login** button. The app then launches your default browser.
2. Type the login credentials for your organization's network in the fields provided.
3. If this is your first time logging in with SSO, you must click the **Allow** button to authorize the app to use these credentials.

Fingerprint Login

Updated the Android mobile app so that you can now use your fingerprint to log in to the app.

Before You Begin: The biometric prompt is standardized and provided by your device's operating system. Your device needs to be fingerprint scan-enabled which is available on Android M operating systems and up.

Configuration

In your mobile device, enable fingerprint login in **Manage Accounts** > **Login Type** > **Fingerprint**.

Fingerprint is the default login option but you can change your login option to pin code or pattern depending on your device.

Note: Pin or pattern login is determined by the standard lock screen setup on your device.

Enable your Account for Fingerprint Login

Before You Begin: The biometric prompt is standardized and provided by your device's operating system. Your device needs to be fingerprint scan-enabled which is available in Android M operating systems and up.

1. On the login screen open the context menu and tap **Manage Accounts**.
2. In the **Login Type** section, select the **Fingerprint** option.
3. Tap the back arrow to exit the screen and save your changes.

   Note: The save password option will not be available to all devices, only some devices running Android Marshmallow and up will be able to save their password.

Initial Fingerprint Login

Do the following to login for the first time using your fingerprint:

1. If you selected the option to remember your password when you enabled fingerprint login, the app displays a pop-up dialog which asks you to save your password.
2. After your password is saved, a pop-up dialog is displayed which asks you to confirm your credentials.
3. Touch the fingerprint sensor on the screen to confirm your credentials.

   You are automatically logged in if the fingerprint is accepted.

Fingerprint Login

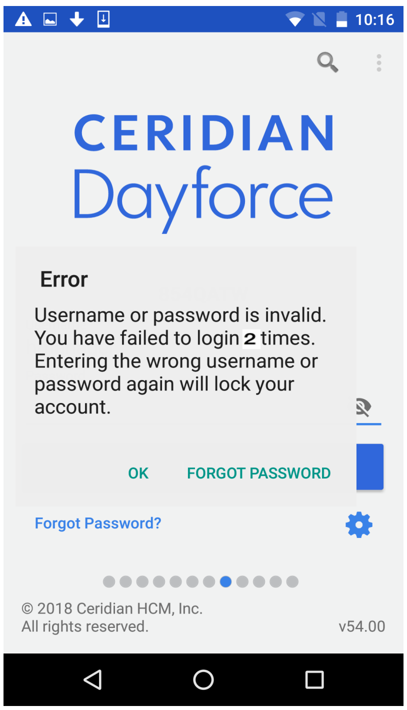
Do the following to login using your fingerprint:

1. Place your finger on the fingerprint scanner on the login screen.
   You are automatically logged in if the fingerprint is accepted.

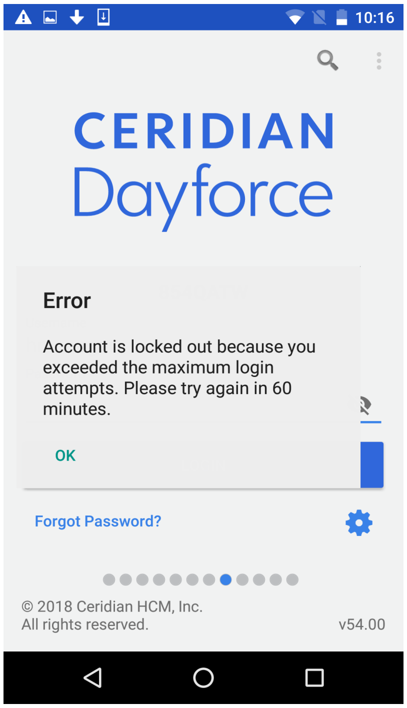
Note: The biometric prompt is standardized and provided by your device's operating system.

Failed Login

You will be warned of your last attempt to log in if you repeatedly type in your password incorrectly. After the second failed login attempt you are warned that you will be locked out of your account.



After the third failed login attempt a popup dialog explains why you are locked out and specifies the duration of your lock out. You can specify how long a user will be locked out of their account otherwise the default lock out duration is 120 minutes.



Note: The duration of the account lock out can be changed and specified.

Temporarily View your Password

You can temporarily view the password that you are typing in the login screen and **Change Password** screen by holding the show password button . The password is only displayed while you hold the button.

View Frequently Asked Questions

You can view frequently asked questions from the login screen by opening the menu and tapping **FAQ**. The app opens the FAQ page in your default browser, where you can view answers to common questions such as "What is my company ID?" and "How do I reset my password?"

Note: You can also view this from within the app by tapping FAQ in the menu on the Home screen.

Set up your Security Questions

Set up your security questions by doing the following:

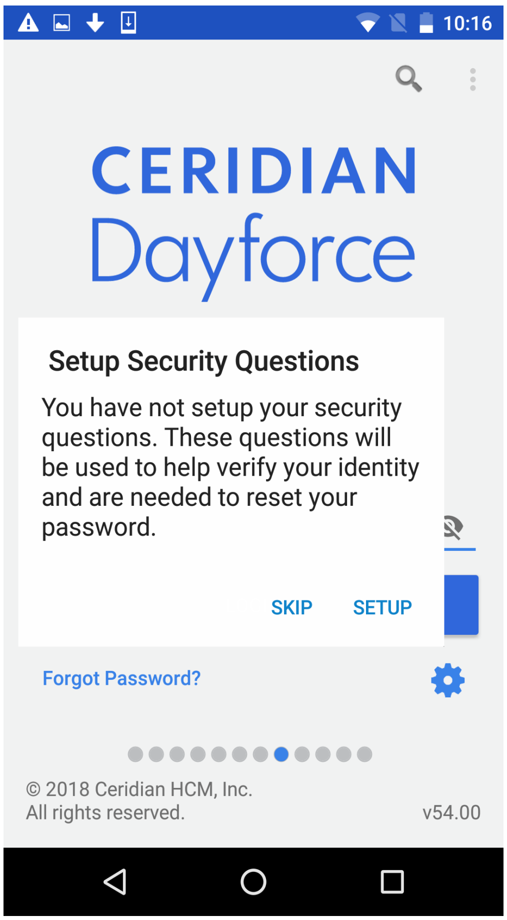
1. In the **My Profile** feature select **Update Security Questions**.
2. Enter your current password.
3. Answer security questions number 1 and 2.

Note: You can change the current security questions by tapping the question to open the question option list. There is a checkmark beside the chosen question.

4. Save.
   Next time you tap **Forgot Password** on the login screen, the app displays the security questions that you set up.

Update Security Questions

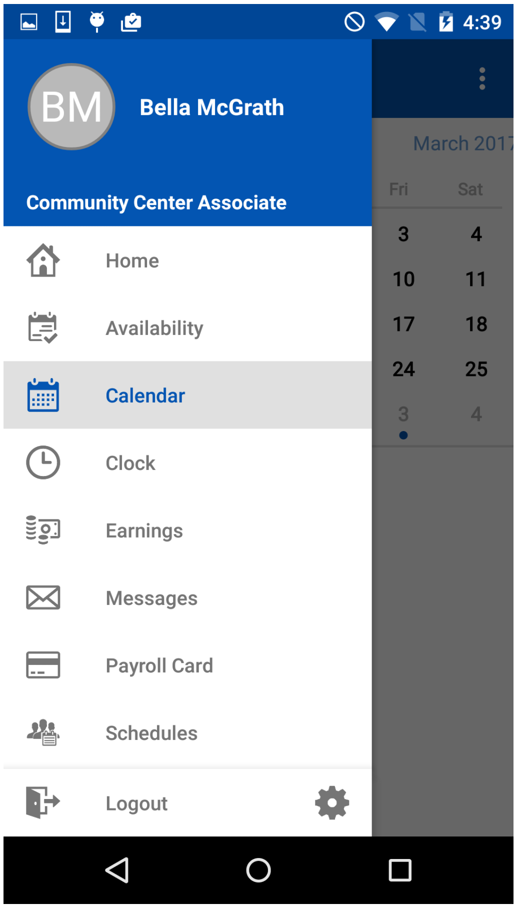
If you have not set up your security questions the app displays a prompt when you log in. Select **Setup** to set up your security questions. If you select **Skip**, you will be prompted with the same dialog the next time you log in:



Note: The app displays this dialog if you log in using your native authentication credentials not if you log in using single sign-on (SSO).

Navigation Panel

Swipe to the right or tap the navigation menu icon on the upper left to access the navigation panel:



In addition to the listed features the navigation panel contains:

- Header section - contains current user summary, avatar (or picture), name and role.
- All available roles - tap the triangle to access additional roles if available.
- Sub-menu items - for the features that are listed. The menu items are collapsed under the parent menu items. If there are sub-menu items users tap the triangle to access the items.
- Logout.
- Settings icon - to access setting menu options and a link to **Help**.

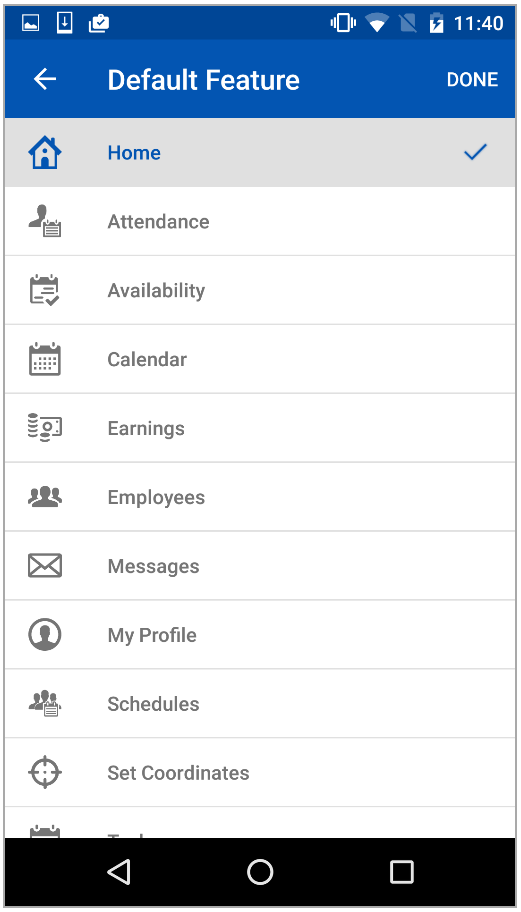
Note: If users have access to specific sub-feature menu items but not to the parent items the parent item is displayed in order to access the sub item(s).

Note: If a feature is disabled it is not displayed in the navigation panel.

Default Feature

You can change your default feature from **Home** to another feature of your choice.

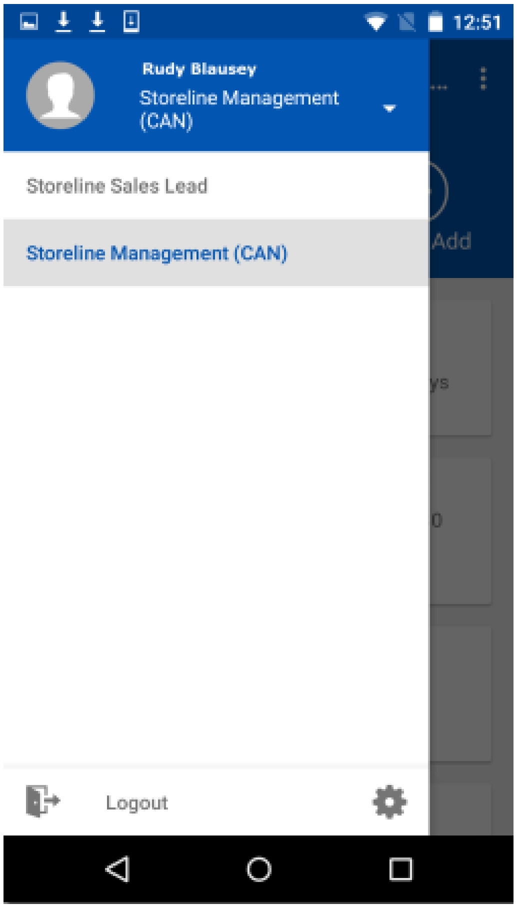
1. Tap the settings icon .
2. Select **Set Default Feature**. The checkmark will be displayed beside the feature that you select as the default feature:



Switch Roles

If you have more than one role you can switch roles:

Tap the triangle on the upper right to expand the available roles. The current role is highlighted:

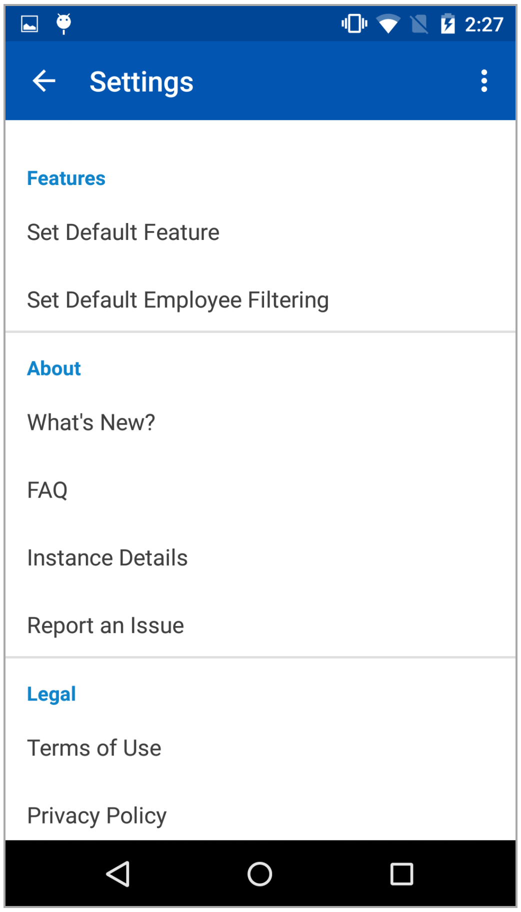


Tap to choose another role. The listed features in the navigation panel adjust accordingly.

Reporting an Issue

After three unsuccessful login attempts, the application prompts you to report an issue. If you have been experiencing an issue in the mobile app that is not related to logging in, you can choose to report it from the Settings screen.

On the **Home** screen tap the settings button then tap **Report an Issue**:



The application automatically populates an email address with the appropriate recipient and subject line. The email also includes a log file that will be used to debug the issue.

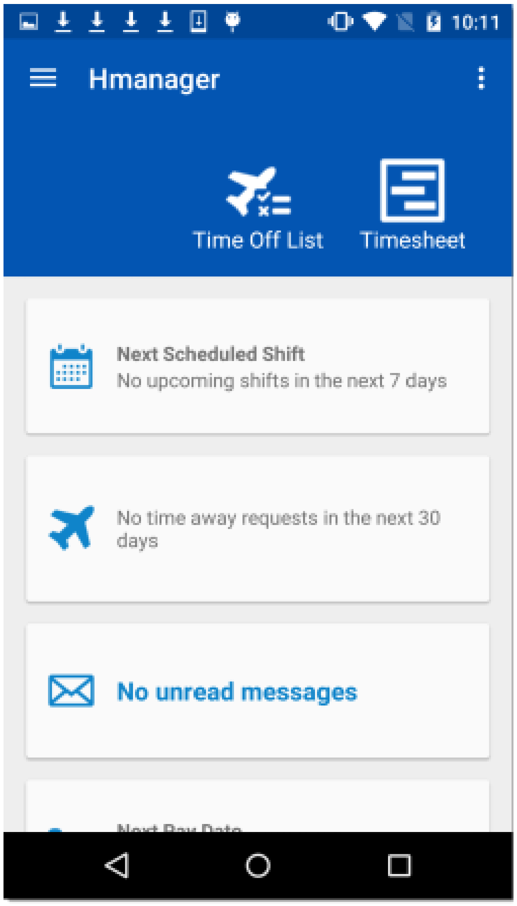
Note: To use this functionality, you must have an email address associated with your mobile device.

Widgets

Added widgets so that you can have quick and easy access to key information pertaining to you. Widgets let you preview your work and approval statuses from the home screen. The following is a list of features that are displayed as widgets:

- **Calendar**
- **Time Away**
- **Wages**
- **Messages**
- **Earnings**
- **TeamRelate**
- **Approvals**

Note: Widgets are currently available if you are using both mobile client and server version 7.48 or higher.



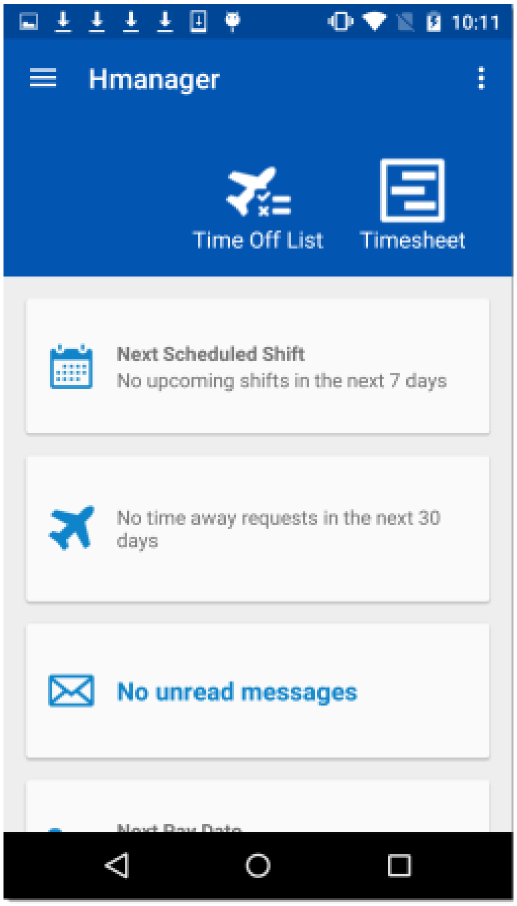
Special Notes

- If your role does not have access to specific features those widgets are not displayed.
- All available widgets are automatically displayed when you log in for the first time.
- If your role does not have access to any of the features that have widgets the app displays a message: No data available.
- If your role changes in terms of feature access widget availability reflects that change.
- You have the option to configure your widgets after your initial log in.

Configure Widgets

Configure widgets by doing the following:

Select **Configure Widgets** from the context menu on the upper right of the home screen. Widgets are now in edit mode:



You are then able to delete, add, and re-order widgets. Refer to the next section.

Delete, add, or Re-Order Widgets

Delete, add, and re-order widgets from the **Configure Widgets** screen by doing the following:

Delete widgets by tapping the delete icon .

Add widgets by tapping the add icon .

Re-order widgets by selecting the icon beside the widget that you want to move and dragging the widget to the desired position.

Manager Guide

Through the mobile app, managers can review and edit employee information, approve and deny requests, track attendance, and manage their tasks.

This section describes the following actions you can perform:

- **Select a Location** on page 43
- **View and Contact Employees** on page 44
- **Manage Time Away From Work Requests** on page 80
- **Messages** on page 108
- **Set Your Coordinates** on page 84
- **Manage Tasks** on page 88
- **View Your Profile** on page 116
- **View your Earnings Statement** on page 174
- **View Your Payroll Card Transactions** on page 178

Approvals

The approvals feature allows you to view shift trade and availability requests, and approve or deny those requests.

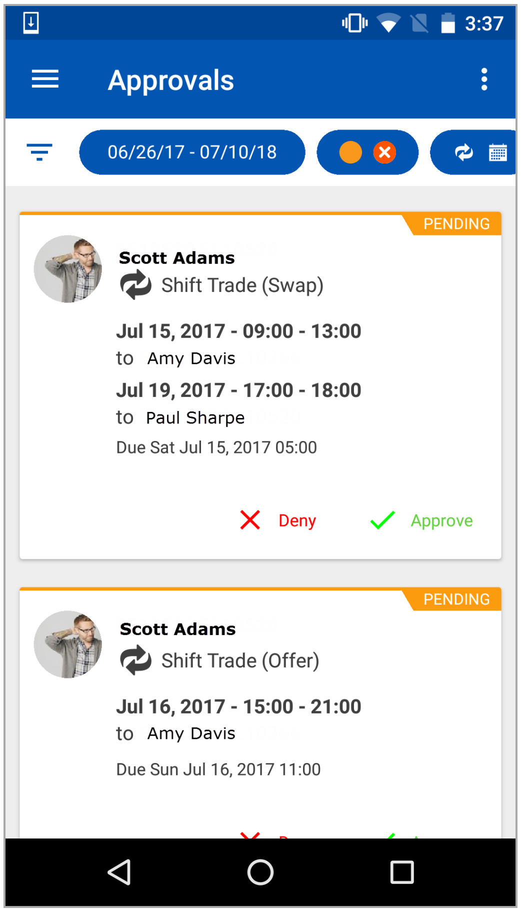
Main Screen

When you open the **Approvals** feature, the app displays each request on its own card and all requests are sorted by the request date. Requests that fall on the same day are sorted by the creation date. There are five types of requests:

- Overtime Banking
- Unfilled Shift Trade
- Unfilled Shift Bid
- Shift Trade (Offer and Swap)
- Availability (Default and Temporary)

Requests have the following statuses:

- **Pending**: Orange color at the top of the card.
- **Cancellation Pending**: Dark orange color at the top of the card.
- **Approved**: Green color at the top of the card.
- **Denied**: Red color at the top of the card.
- **Cancelled**: Gray color at the top of the card.



The following additional points apply to approval requests:

- If a request is past due, the app displays "Due: (Date)" message in red font on the request card. For example, “Due: Dec 31, 2017".
- If the due date time on a request is due on the current day, the app displays a "Due: Today" message on the request card.

Filter

Filters allow you to organize how to view incoming approvals. If changes to your filter are saved, filter selections continue for the duration of the session. If the filter criteria return no results, the app displays the message "No approvals match the filter criteria".

Default Filter

By default, the app filters approval requests by the following:

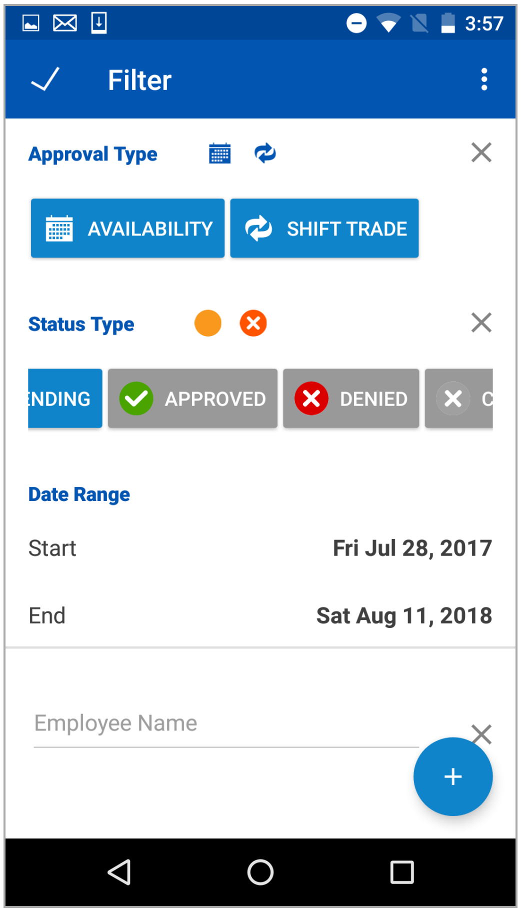
- The approval types that are configured in the main application.
- Pending and Cancellation Pending status.
- Date range from two weeks previous, to one year ahead of the current day.

- Employee is not specified.
- Manager is set to self.

Filter your Approval Requests

Do the following to filter your approval requests:

1. Select the filter button () to open the filter screen:



2. Make your selection from the following filter options:
   - **Approval Type**: Approval types include **Overtime Banking**, **Unfilled Shift Bid**, **Unfilled Shift Trade**, **Availability** and **Shift Trade**. Tap to make your selection.
   - **Status Type**: Statuses include - Pending, Cancellation Pending, Approved, Denied and Cancelled.
   - **Date Range**: Enter a start and end date by tapping the **Start** and **End** fields.
   - **Employee Name**: Select the field to open the keyboard on your device where you can type in an employee name.
   - **Manager**: Select the field to open a drop-down list of managers to choose from.
   - **Reset to Default**: Select to reset the filter back to the default options.

3. Optionally, select ( ) to open the screen to specify the fields that you want to show and hide. Make your selection from the following:
   - Location
   - Job
   - Department
   - Pay Group
   - Pay Policy
   - Include New Hires
   - Actionable Only

   Note: You do not have the option to hide the **Date Range** and **Manager** fields.
4. Select ( ) to save your filter.

Show or Hide your Filter Options

Do the following to show or hide your filter options:

1. Select the filter button ( ) to open the filter screen.
2. Select ( ) to open the screen to specify the fields that you want to show and hide.
3. Select from the following options:
   - Location
   - Job
   - Department
   - Pay Group
   - Pay Policy
   - Include New Hires
   - Actionable Only

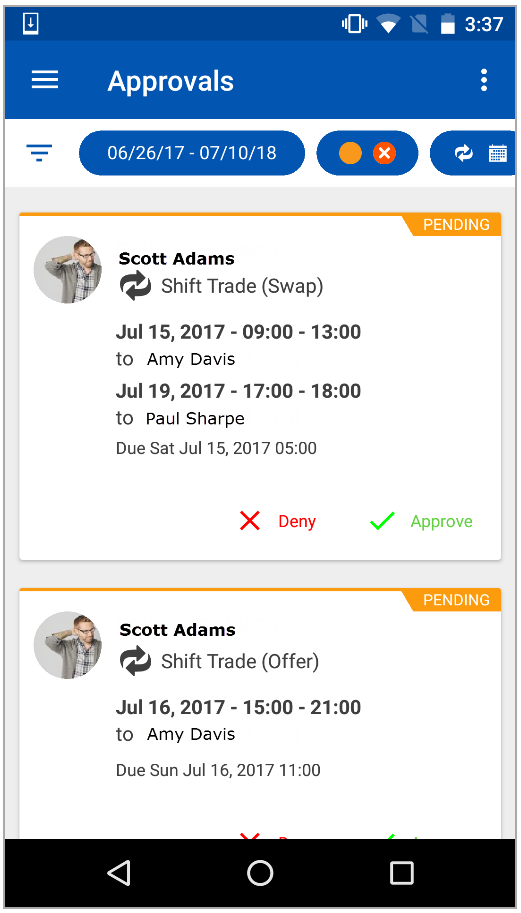
   Note: You do not have the option to hide the **Date Range** and **Manager** fields.
4. Select ( ) to save.

Shift Trade

You can approve or deny shift trades from the list of pending approvals, or from the shift details screen. After you make your selection, the app loads and updates the card's status to reflect the action that was taken. Depending on your filter settings, the request may no longer be visible in the list. For example, if your filter specifies to view **Pending** and **Cancellation Pending** statuses only, after you approve or deny a request, it will no longer be displayed in the list.

Shift trade offer and swap cards in the list of pending approvals contain the following information:

- Initiators name
- Avatar (If there is no avatar, initials)
- Request type
- Request type icon
- Date and time of shift offering
- Name of the recipient
- Shift trade due date
- Date and time of shift receiving (Shift Trade swap card only)



You can approve or deny shift trades in the list of pending approvals by selecting **Approve** or **Deny**. After you make your selection, the app loads and updates the card's status to reflect the action that was taken. Depending on your filter settings, the request may no longer be visible in the list. For example, if your filter specifies to view pending and Cancellation pending statuses only, after you approve or deny a request, it will no longer be displayed in the list.

You also have the option to view shift trade details by selecting a card to flip it over. The shift trade details screen for shift trade offers contains the following:

Shift trade offer and swap detail cards contain the following information:

- Initiators name
- Avatar
- Date and time of the shift
- Job and location
- Arrow pointing below to another mini card with the recipient's name and "Accepted the offer" message. (Shift trade offer only).
- Arrow pointing down to another mini card that details the same information as the initiator's card. There is also an arrow pointing up to the initiator. (Shift Trade swap only).

Approve or Deny Shift Trades

Do the following to approve or deny shift trades from the list of pending approvals:

1. From the list of pending approvals scroll to the card that you want to take action on.
2. Select **Approve** or **Deny** on the card.

Do the following to approve or deny shift trades from the details screen:

1. From the list of pending approvals select a card to view the shift details.
2. Optionally, tap the **Manager Comment** field to add a comment.
3. Select **Approve** or **Deny** on the card.

Availability

You can approve or deny availability request cards from the list of pending approvals, or from the availability details screen. After you make your selection, the app loads and updates the card's status to reflect the action that was taken. Depending on your filter settings, the request may no longer be visible in the list. For example, if your filter specifies to view **Pending** and **Cancellation Pending** statuses only, after you approve or deny a request, it will no longer be displayed in the list.

Temporary and default Availability cards in the list of pending approvals contain the following information:

- Initiators name
- Avatar (If there is no avatar, initials)
- Request type
- Request type icon
- Start date of availability
- Request due date
- End date of availability (Availability temporary card only)

The Availability detail screen contains the following information:

- Initiator's name
- Avatar

- Request type
- Request due date
- Start and end date of the availability request.
- Previous availability time and requested availability time by date of the week
- Employee comment section
- Manager comment section

Approve or Deny Availability

Do the following to approve or deny availability from the list of pending approvals:

1. From the list of pending approvals, scroll to the card that you want to take action on.
2. Select **Approve** or **Deny**.

Do the following to approve or deny availability in the details screen:

1. From the list of pending approvals select a card to view the shift details.
2. Optionally, tap the **Manager Comment** field to add a comment.
3. Select **Approve** or **Deny**.

Overtime Banking

You can approve or deny overtime banking from the list of pending approvals, or from the details screen. After you make your selection, the app loads and updates the card's status to reflect the action that was taken. Depending on your filter settings, the request may no longer be visible in the list. For example, if your filter specifies to view **Pending** and **Cancellation Pending** statuses only, after you approve or deny a request, it will no longer be displayed in the list.

Configuration

Enable the following in the main application for overtime banking approval:

- **System Admin > Roles > Features > Mobile > Mobile Manager > Approvals > Overtime Banking**

Overtime Banking Cards and Detail Screen

Overtime Banking request cards are on the main screen and contain the following information:

- Initiators name
- Avatar (If there is no avatar, initials)
- TeamRelate halo
- Request type and request type icon
- String to indicate the pay out Example: "Pay out 5 hours on Mar. 28, 2018"
- Date of the pay out

- Due date
- **Approve** and **Deny** buttons (if applicable)

Note: Hours to pay out can contain up to seven figures (i.e., 9999999) and five decimal places (i.e., 9.99999).

The Overtime Banking detail screen contains the following information:

- Initiators name
- Avatar (if no avatar, initials)
- TeamRelate halo (if applicable)
- Request type and request type icon
- Due date
- Withdrawal string
- Pay out date
- Pay out hours
- Balance details: Select to view OT Bank screen (existing balances in the user interface)
- Employee comment field
- Manager comment field
- **Approve** and **Deny** buttons (if applicable)

Approve or Deny Overtime Banking

Do the following to approve or deny overtime banking from the list of pending approvals:

1. From the list of pending approvals scroll to the card that you want to take action on.
2. Select **Approve** or **Deny** on the card.

Do the following to approve or deny overtime banking from the details screen:

1. From the list of pending approvals select a card to view the shift details.
2. Optionally, tap the **Manager Comment** field to add a comment.
3. Select **Approve** or **Deny** on the card.

Unfilled Shift Trade

You can approve or deny unfilled shift trades from the list of pending approvals, or from the details screen. After you make your selection, the app loads and updates the card's status to reflect the action that was taken. Depending on your filter settings, the request may no longer be visible in the list. For example, if your filter specifies to view **Pending** and **Cancellation Pending** statuses only, after you approve or deny a request, it will no longer be displayed in the list.

Configuration

Enable the following in the main application for Unfilled Shift Trade approval:

System Admin > Roles > Features > Mobile > Mobile Manager > Approvals > Unfilled Shift Trade

Unfilled Shift Trade Cards and Detail Screen

Unfilled shift trade cards in the list of pending approvals contain the following information:

- Recipients name
- Avatar (If there is no avatar, initials)
- TeamRelate halo (if applicable)
- Request type and request type icon
- Date and time of shift offering
- Shift trade due date
- **Approve** and **Deny** buttons (if applicable)

Unfilled shift trade detail cards contain the following information:

- Name and image of recipient
- TeamRelate halo (if applicable)
- Approval type string and icon
- Due date and time
- Two Mini Cards below:

    Top Card

    - Unfilled shift
    - Date and time of shift
    - Position and location

    Bottom Card

    - Name and avatar of recipient
    - String: "accepted the offer"

    - Manager comment field
    - **Approve** and **Deny** buttons

Approve or Deny Unfilled Shift Trades

Do the following to approve or deny unfilled shift trades from the list of pending approvals:

1. From the list of pending approvals scroll to the card that you want to take action on.
2. Select **Approve** or **Deny** on the card.

Unfilled Shift Bid

You can approve or deny unfilled shift bids from the details screen. After you make your selection, the app loads and updates the card's status to reflect the action that was taken. Depending on your filter settings, the request may no longer be visible in the list. For example, if your filter specifies to view **Pending** and **Cancellation Pending** statuses only, after you approve or deny a request, it will no longer be displayed in the list.

Configuration

Enable the following in the main application for Unfilled Shift Bid approval:

System Admin > Roles > Features > Mobile > Mobile Manager > Approvals > Unfilled Shift Bid

Unfilled Shift Bid Cards and Detail Screen

Unfilled shift bid cards in the list of pending approvals contain the following information:

- Recipients name
- Avatar (If there is no avatar, initials)
- TeamRelate halo (if applicable)
- Request type and request type icon
- Date and time of shift offering
- Shift trade due date
- Quantity badge indicating how many employees have bid

  Note: The app displays the badge in a gray color if no action can be taken on a request.

Unfilled shift bid detail cards contain the following information:

- Name and image of manager (if no image, initials)
- TeamRelate halo (if applicable)
- Approval type string and icon
- Due date and time
- **Shift Details**:
  - Display date and time of shift
  - Position
  - Location of shift
- Number of employees that bid on the shift (i.e., "2 Employees Bid on This Shift")

  Row for each bidder:
    - Employee name and image (if no image, initials)
    - TeamRelate halo (if applicable)
    - Position
    - Job seniority date

- Manager comment field
- **Approve** button (if applicable). Button is disabled until an employee is chosen.
- **Deny** button (if applicable).

  Note: The app displays the **Deny** button for the **Cancellation Pending** status only.

Approve or Deny Unfilled Shift Bids

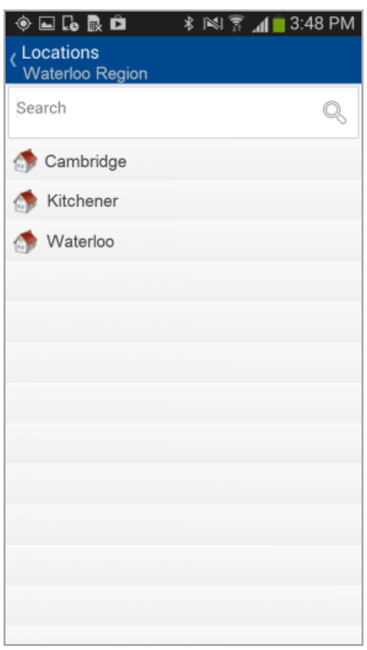
Do the following to approve or deny unfilled shift bids from the details screen:

1. From the list of pending approvals select a card to view the shift details.
2. Tap to choose an employee from the bidder list.
3. Optionally, tap the **Manager Comment** field to add a comment.
4. Select **Approve** or **Deny** on the card.

   Note: The app displays the **Deny** button for the **Cancellation Pending** status only.

Select a Location

If you have access to more than one location, the first time you open a feature that requires you to select a location, the application displays all of the locations to which you have access:

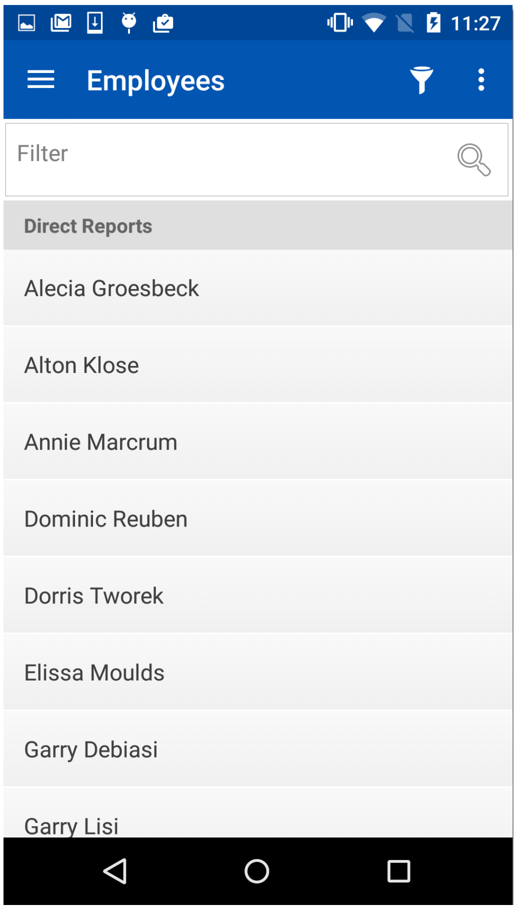


Tap the location you want to select. The application persists your selection when you navigate to a different feature that requires a location. For example, if you select the Cambridge location in the **Time Off List** feature, the application automatically selects the Cambridge location when you later open the **Attendance** feature.

To select a different location, in the **Attendance**, **Set Coordinates**, **Tasks**, or **Time Off List** features, open the context menu and tap the **Choose Location** option.

View and Contact Employees

Through the **Employees** feature, you can review key employee information and contact employees. The application lists all your employees for the location(s) you have access to. For example, if you manage two locations, all employees from those locations are incorporated into this list. In addition, if you already selected a location in another feature of the application, the **Employees** feature will still display employees from all locations that you have access to:



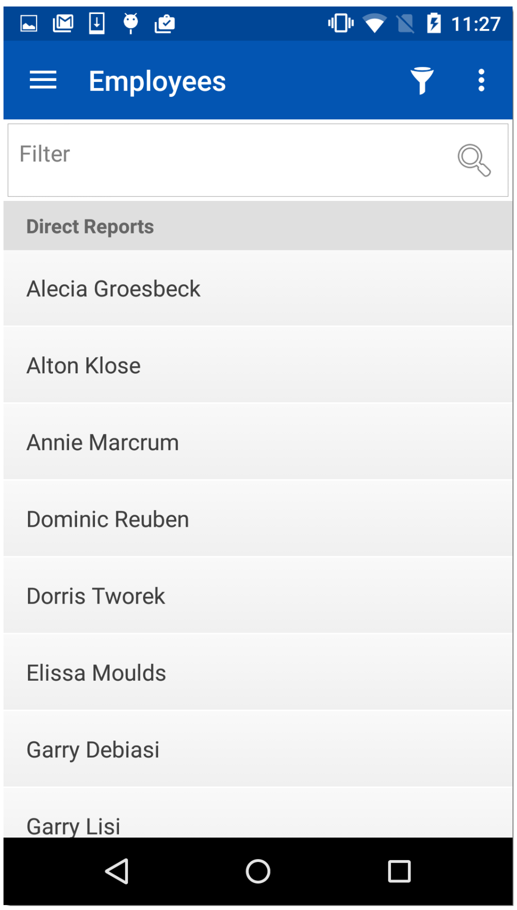
Scroll down the list to find an employee. If the list comes to an end, scroll all the way down; the **Loading** message is briefly displayed, and then more employees from your location(s) are displayed.

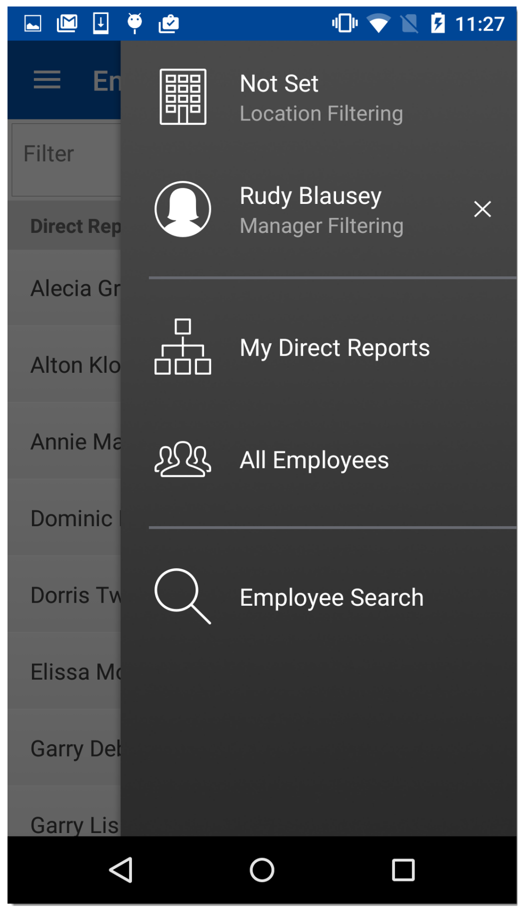
You can search for an employee by typing all or part of their name in the search bar and pressing Enter on your keypad.

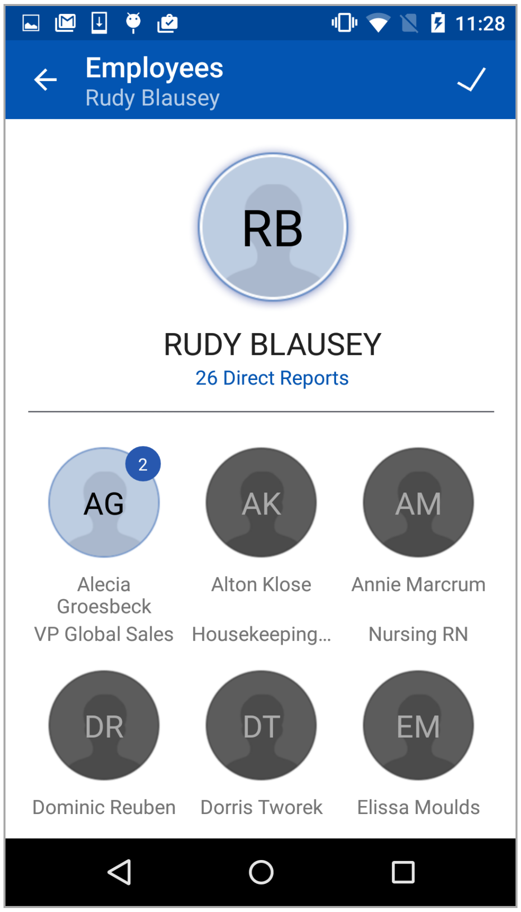
Manager Selectors

Managers can see their direct reports across all locations in the **Time Off List**, and **Employees** features. By default, when a manager opens the **Time Off List** or **Employees** features the app displays the employees who report directly to them across all locations. A manager's direct reports can be in different locations with this display. You can also explore different locations or different managers from the two filter options and those two filter options can be used at the same time.

Open the menu on the upper right. Select **Manager Filtering** to open the picker. You can navigate down the hierarchy to view a given department at a given store. In the manager filter if an employee is colored gray they have no direct reports. If direct reports exist, the icon is blue and there is a badge on it for the number of people or locations that fall underneath. If a manager wants to view all employees, they can tap the **All Employees** button from the menu.



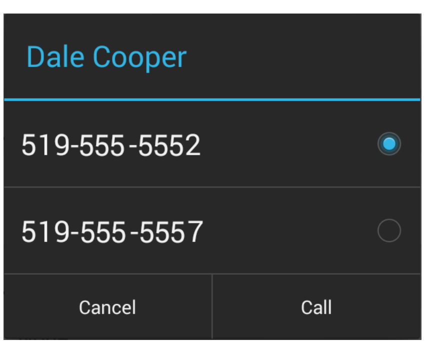




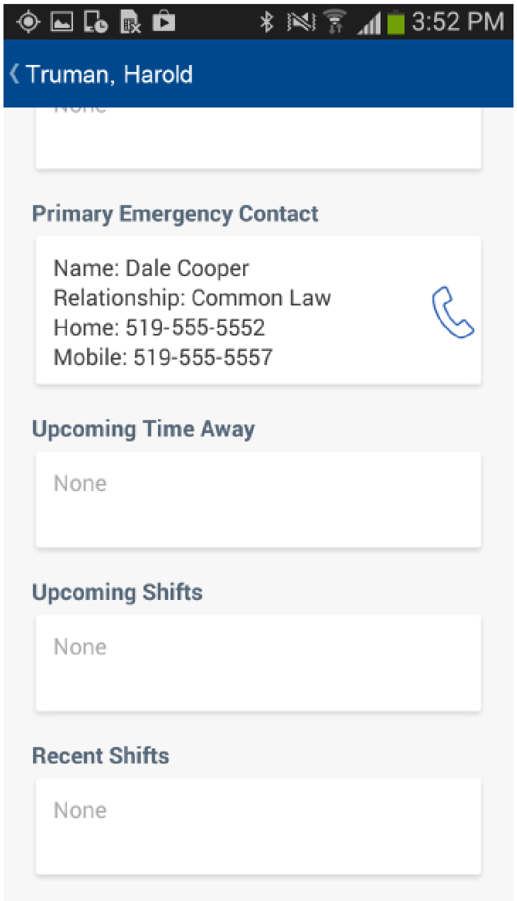
Note: This feature requires server version 7.47 or higher.

Contact Employees

Select an employee from the list, and the application displays the information that is on file for that employee, including any address, phone numbers, email addresses and emergency contacts (the application displays the employee's relationship to their emergency contact and indicates which contact is the primary emergency contact). You can contact the employee or their emergency contact by quickly by tapping the phone icon next to the contact information. In cases where there are multiple modes of contact, the application prompts you to select which one you want to use:



The application also lists any **Upcoming Time Away**, **Upcoming Shifts** and **Recent Shifts** for the employee:



The **Upcoming Time Away** section displays time away from work requests that have been approved and that will take place in the next 30 days. The application displays the date or date range of the time away from work request, the total amount of hours or days away, and the type of time away from work (e.g., unpaid day off, vacation, etc.).

The **Upcoming Shifts** section displays any approved scheduled shifts coming up in the next seven days. When an employee punches in for a scheduled shift, the application removes the shift from the **Upcoming Shifts** section.

The **Recent Shifts** section displays all start and end shift punches made in the past seven days (including those for shifts that have been started, but not yet completed). Punches recorded are independent from the approved schedule; if the employee is not scheduled but has made a punch, the punch will be displayed.

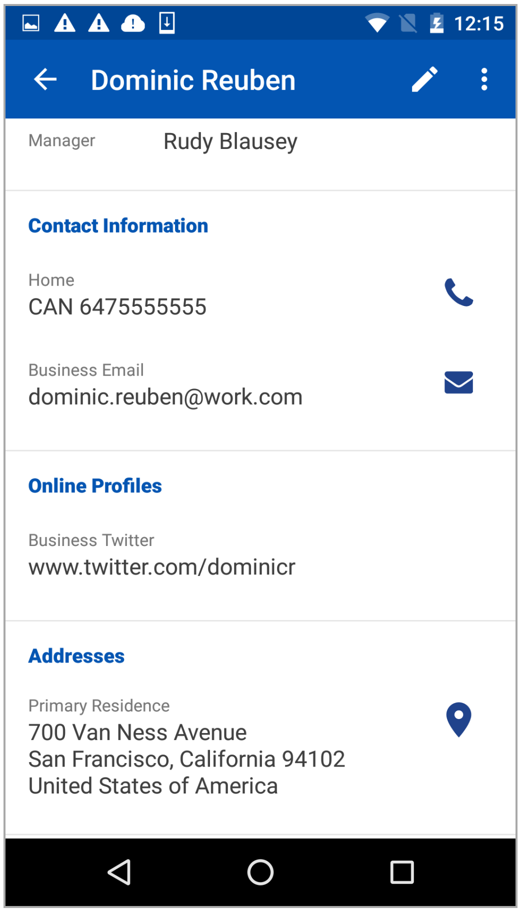
The **Balances** section displays the employee's current balances, such as number of vacation days.

In the employee details screen, if you have the necessary access, you can reset the employee's password by opening the context menu and tapping the **Reset Password** option.

Add and Edit Phone Number Data

Managers are able to add, edit, and delete phone number data. The following fields are available:

- **Phone Numbers**:
  - **Type** (mandatory)
    - Home (default)
    - Mobile
    - Business fax
    - Business mobile
    - Business
    - Personal fax
    - Pager
    - TTYTDD
  - **Country Codes** (mandatory)
  - **Phone Number** (mandatory)
  - **Extension** (optional)
  - **Alerts** (optional)
  - **Unlisted** (optional)



Notes

- There is no limit to the number of phone numbers that can be added.
- Mandatory fields are marked with an asterisk(*).

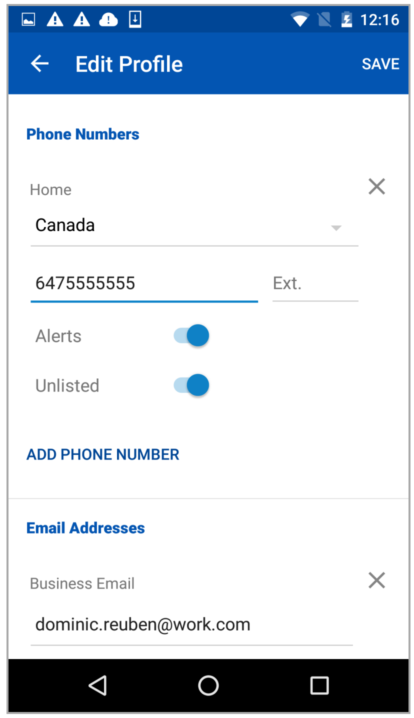
Configuration

Managers - To add and edit contacts using the **Employees** feature:

- Configure role access in **System Admin** > **Roles** > **Features** > **Mobile** > **Mobile Manager** > **Employees** > **Direct Edit Contact Information** in the main application.
- Set authorizations to read, create, edit, or delete Profile data in **System Admin** > **Roles** > **Authorizations** > **Employee Contact Information** in the main application.

Add a Phone Number

1. Tap the edit icon.
2. In the **Phone Numbers** section, tap **Add Phone Number**.
3. Select the **Phone Number Type**.
4. Tap to select the country code.
5. Tap the phone number field to type in a phone number and extension if applicable.
6. In the **Alerts** field slide the button to the right if you want to receive alerts.
7. In the **Unlisted** field slide the button to the right if you want the number to be unlisted.
8. Tap **Save**.



Add and Edit Email Address and Online Profile Data

You are able to add, edit, and delete Email Address and Online Profile data. The following fields are available:

- **Email Address**
  - **Type** (mandatory)
    - Business
    - Personal
  - **Email address**
  - **Alerts**
- **Online Profile**:
  - **Type** (mandatory)
    - Twitter
    - Facebook
    - Business Twitter
    - LinkedIn
  - **Profile Address** (mandatory)

Notes

- There is no limit to the number of email addresses and online profile that can be added.
- Mandatory fields are marked with an asterisk(*).

Configuration

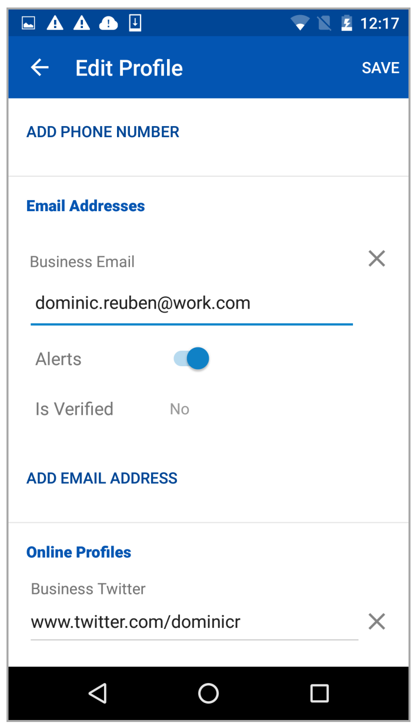
Managers - To add and edit contacts using the **Employees** feature:

- Configure role access in **System Admin** > **Roles** > **Features** > **Mobile** > **Mobile Manager** > **Employees** > **Direct Edit Contact Information** in the main application.
- Set authorizations to read, create, edit, or delete profile data in **System Admin** > **Roles** > **Authorizations** > **Employee Contact Information** in the main application.

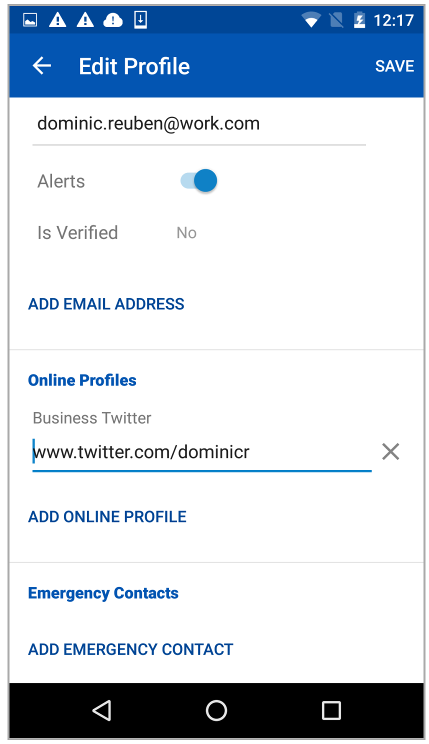
Add an Email Address

1. Tap the edit icon.
2. In the **Email Address** section, tap **Add Email Address**.

   Note: If you want to edit an existing email address skip step 2.
3. Tap to add the **Email Address Type**.
4. In the **Email Address Types** screen, tap to choose a type.
5. In the **Email Address** field, type in your email address.
6. In the **Alerts** section, slide the button to the right to subscribe to alerts.
7. Tap **Save**.



Add an Online Profile



1. Tap the edit icon.
2. In the **Online Profile** section, tap **Add Online Profile**.

   Note: If you want to edit an existing email address skip step 2.

3. Tap to add a profile type.
4. In the **Online Profile Types** screen, tap to choose a type.
5. In the **Profile Address** field, type in your profile address.
6. Tap **Save**.

Add and Edit Emergency Contacts

Managers are able to add, edit, and delete emergency contacts. The following fields are available for emergency contacts:

- **First Name** (mandatory)
- **Last Name** (mandatory)
- **Relationship** (mandatory)
- **Email** (optional)
- **Business Phone** (optional)
- **Home Phone** (optional)
- **Mobile Phone** (optional)

Notes

- There is a limit of 2 emergency contacts. If 2 emergency contacts already exist the option to add or import an emergency contact is not displayed until you delete a contact.
- At least one phone number type is required (business, home, or mobile).
- Character length limit for **First Name** and **Last Name** fields is 64.
- Character length limit for **Email Address** is 250.
- String length limit for phone numbers is 30 (excluding brackets, spaces, dots and dashes).

- String length limit for international phone numbers is 15 (excluding brackets, spaces, dots and dashes).

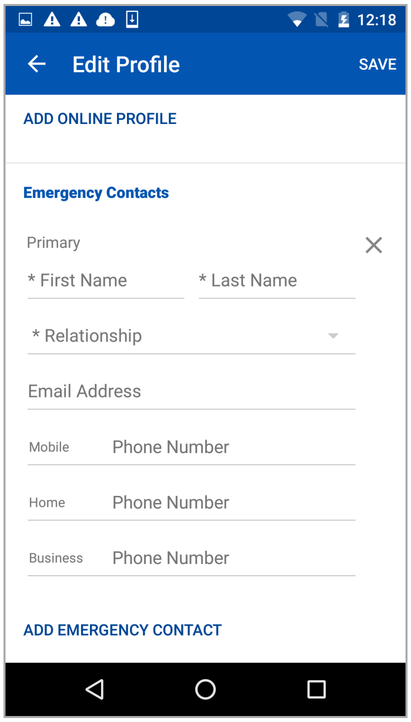
Configuration

Managers - To add and edit emergency contacts using the **Employees** feature:

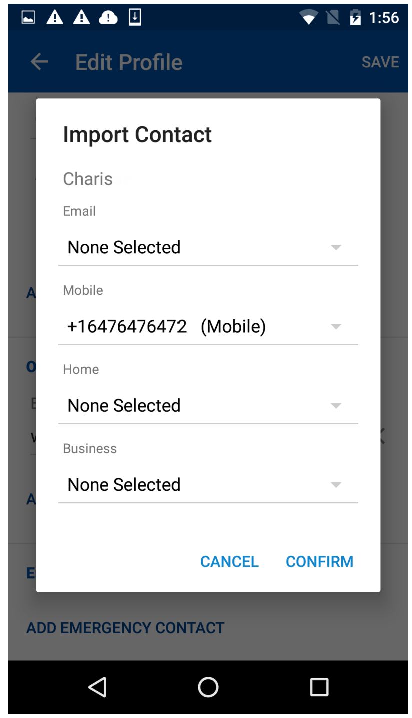
- Configure role access in **System Admin** > **Roles** > **Features** > **Mobile Manager** > **Employees** in the main application.
- Set authorizations to read, create, edit, or delete emergency contacts in **System Admin** > **Roles** > **Authorizations** > **Employee Emergency Contacts** in the main application.

Add Emergency Contacts Manually

1. Tap the edit icon.
2. In the **Emergency Contacts** section tap **Add Emergency Contact**.
3. In the **Add Emergency Contact** option list select **Add Contact Manually**.
4. In the **First Name** field type in the first name.
5. In the **Last Name** field type in the last name.
6. In the **Relationship** field choose an option from the pop-up screen.
7. In the **Email Address** field optionally type in an email address.
8. Type in a phone number for at least one of the phone number types: Mobile, Home, or Business.
9. Tap **Save**.



Import Emergency Contacts from your Mobile Device's Contacts



1. Tap the edit icon.
2. In the **Emergency Contacts** section tap **Add Emergency Contact**.
3. In the **Add Emergency Contact** option list select **Import From Contacts**.
4. In the **All Contacts** screen select a contact.
5. In the confirmation screen confirm the contact information.
6. Optionally, make edits to the fields with missing information.
7. Tap **Save**.

Note: The app displays a pop-up warning message if mandatory fields are not filled out.

Predictive Analytics

Predictive Analytics allows managers to view flight risk and performance analytics for employees.

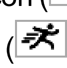
Configuration

Enable the **Predictive Analytics** feature in the main application by navigating the following path:

System Admin > Roles > Features > Mobile > Mobile Manager > Employees > Predictive Analytics

Performance and Flight Risk

When managers open the **Employees** feature, the app displays the following in the employee list where applicable:

- Performance icon () along with a low, medium, or high indicator.
- Flight Risk icon () along with a low, medium, or high indicator.

Note: The app displays red text for the indicator when performance is low and flight risk is high.

The app also displays performance and flight risk information on the **Profile** screen.

Note: If the **Can Read** permission in **System Admin > Roles > Authorizations > Employee Personal Information** is not enabled for a specific role, the app won't display flight risk information.

Review and Manage Attendance

This section describes how to use the **Attendance** feature to review and manage your employees' daily time and attendance records. These records show if and when employees worked compared to when they were scheduled.

The following are actions that you can perform in the **Attendance** feature:

- **Reviewing Attendance** on page 55
- **Replacing Scheduled Employees** on page 61
- **Editing Punches** on page 63
- **Adding Unscheduled Shifts** on page 69
- **Approving Worked Time** on page 71
- **Updating Time Away From Work Requests** on page 72

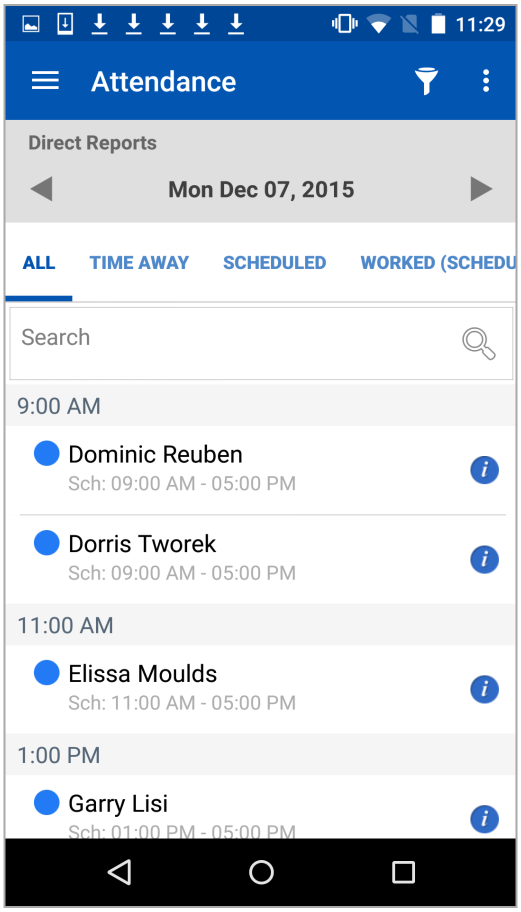
Reviewing Attendance

This section provides an overview of the **Attendance** feature.

The following sections describe the how to review attendance information:

- **Review Attendance Icons** on page 56
- **Change Dates** on page 58
- **Search, Sort and Filter Employees** on page 58
- **Location Selector** on page 59
- **View Shift Details** on page 60

When you open the **Attendance** feature, the application can display only the employees who directly report to the manager across locations or for a given location by default and managers have the option to change the view by applying a filter to display the direct reports of managers below them in the hierarchy. The application uses icons to label absences and other situations, such as if an employee has an upcoming shift or is currently working (i.e., punched in for a shift):



In the above example, the app displays attendance information for Monday December 7th, 2015. The app displays that Dominic, Dorris, Elissa and Garry are scheduled ( ) to work.

Review Attendance Icons

This section describes icons the application uses to label various attendance situations.

Note: To view the most recent shift status at any time, exit and re-open the **Attendance** feature.

- **Scheduled ( ).** Represents an upcoming scheduled shift that the employee has not worked yet. The application displays the time the employee is scheduled to work (**Sch**). This icon changes to the:
  - On Clock (Scheduled) icon ( ) once an employee punches in;
  - Paid to Schedule icon ( ) once a shift starts for an auto pay employee;
  - Scheduled Not Worked ( ) icon if an employee has not punched in by the grace period configured in their punch policy.

You can tap Scheduled shifts to access the **Call-in list**where you can contact other employees eligible to work the shift or add them to the schedule. For more information, see **Replacing Scheduled Employees** on page 61.

- **On Clock (Scheduled) ( ).** Represents a scheduled shift that the employee has punched in for and is currently working. The application displays the time the employee was scheduled to work (**Sch**), and the actual (**Act**) time the employee punched in. Once the employee punches out, the shift is labeled with the Worked (Scheduled) icon ( ).
- **Scheduled Not Worked ( ).** Represents a scheduled shift that an employee has not punched in for by the grace period configured in their punch policy (i.e., the employee is absent). This icon may change to the:
  - Late Punch In icon ( ) if the employee eventually punches in;
  - Worked (Scheduled) icon ( ) if the manager adds a start and end punch to the shift (e.g., in the case where an employee worked a shift but forgot to punch in and punch out). For more information, see **Editing Punches** on page 63.
- **Late Punch ( ).** Represents a late start punch for a scheduled shift; the employee, now 'on the clock', punched in after the grace period configured on their punch policy. The application continues to display this icon when the employee has punched out and when the shift has been approved.
- **Worked (Scheduled) ( ).** Represents a shift that the employee worked as scheduled. The application displays the time the employee was scheduled to work (**Sch**), and the actual (**Act**) times the employee punched in and out.
- **Paid to Schedule ( ).** Represents that a shift has started for an auto pay employee. The application displays the time the employee was scheduled to work (**Sch**). The application continues to display this icon once the shift is over.
- **On Clock (Not Scheduled) ( ).** Represents that an unscheduled employee has punched in and is currently working. The application displays the actual (**Act**) time the employee punched in. Once the employee punches out, the shift is marked with the Worked (Not Scheduled) icon ( ).
- An on call shift that has been confirmed **(** **)**. These shifts represent time the employee is not scheduled to work, but is 'on call' to come into work, if needed. You can confirm an on-call shift once you know the employee is needed to work the shift. Once a shift is confirmed, the application treats it the same as a regularly scheduled shift.
- An on-call shift the employee was called in or paged to work **(** **)**. These shifts represent time the employee is not scheduled to work, but is 'on call' to come into work, if needed.

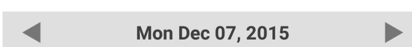
- **Worked (Not Scheduled) ( ).** Represents an unscheduled shift that the employee worked (i.e., where the employee punched in and punched out). The application displays the actual (**Act**) times the employee punched in and punched out.
- An on-call shift that is on standby **(** **)**.
- Pay adjustment **(** **)**.
- Authorized pay adjustment **(** **)**.
- Locked pay period **(** **)**.
- **Pending ( ), Approved ( ), Denied ( ), Cancellation Pending ( ), Canceled ( ).** Represent the status of a time away from work request. You can update the status of a time away from work request directly in the **Attendance** feature. For more information, see **Updating Time Away From Work Requests** on page 72.

Change Dates

This section describes how to view employee attendance for any date.

When you open the **Attendance** feature, the application displays attendance records for the current day.

You can tap the arrows at the top of the screen to move forward or backward in date.



You can also tap the date at the top of the screen (i.e., between the arrows) to open the calendar.

Select a date and tap **Ok**, or tap **Cancel**. The app returns to the attendance list.

Search, Sort and Filter Employees

This section describes how to find and organize employees listed on the attendance list.

Search for Employees

You can search for an employee by typing all or part of their name in the search bar and tapping the search icon.

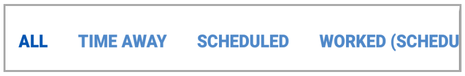
Sort by Name or Time

You can sort employees that are listed by opening the context menu and tapping the **Sort** option.

Then, select how you want to sort the requests, either by name, time or status.

Filter Employees

You can swipe the bar at the top of the screen left or right to select a different filter.

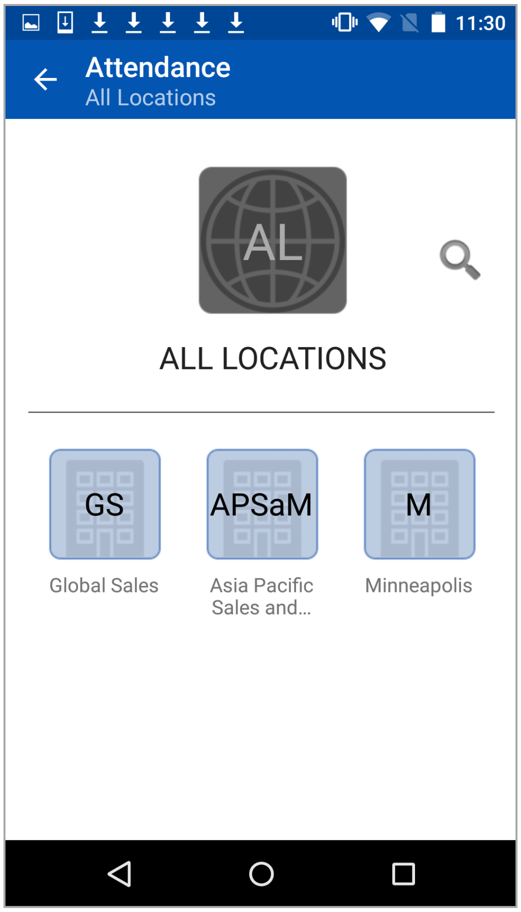


The following filters are available:

- **All.** The default filter selected when you open the **Attendance** feature; it displays all employees and time and attendance information. This is the only filter that also lists employees who have no time and attendance information on the selected day.
- **Time Away.** This filter displays employees with time away on the day selected. This is the only filter that does not list shift information. For more information about updating time away from work request status directly in the **Attendance** feature, refer to **Updating Time Away From Work Requests** on page 72.
- **Scheduled**, **On Clock (Scheduled)**, **On Clock (Not Scheduled)**, **Paid to Schedule**, **Worked (Scheduled)**, **Scheduled Not Worked**, and **Worked (Not Scheduled).** These filters list only employees labeled with a particular status. For example, the **Scheduled** filter only lists employees labeled with the Scheduled icon ( ).
- **Not Approved.** This filter lists employees with shifts that are eligible for you to approve, including those labeled with the Worked (Scheduled) icon ( ) and Worked (Not Scheduled) icon ( ). For more information, see **Approving Worked Time** on page 71.
- **Approved.** This filter lists shifts that you have approved.

Location Selector

Tap the menu on the upper right and then select **Location Filtering** if you want to open the picker to select a different location for your filter. Change your filter by making a selection from one of the child nodes outlined in blue:



View Shift Details

This section describes how to open an employee's shift details screen to manage employee attendance. This section also provides details about **Contacting Employees** on the next page.

To view shift details, select an employee with shift information from the attendance list (e.g., an employee who is labeled with the Scheduled icon ( ) or Worked (Not Scheduled) icon ( ).

The application displays the shift details screen, which can include the following information: scheduled shift, meal and break times; actual punches recorded; location; job; pay code; transfers; activities and tasks.

Note: If you select an employee who is not labeled with an attendance icon, the application displays the **New Shift** screen where you can create a new unscheduled shift for the employee. For more information, see **Adding Unscheduled Shifts** on page 69.

For more information about managing employee attendance in the shift details screen, refer to the following sections:

- **Replacing Scheduled Employees** on page 61
- **Editing Punches** on page 63
- **Approving Worked Time** on page 71

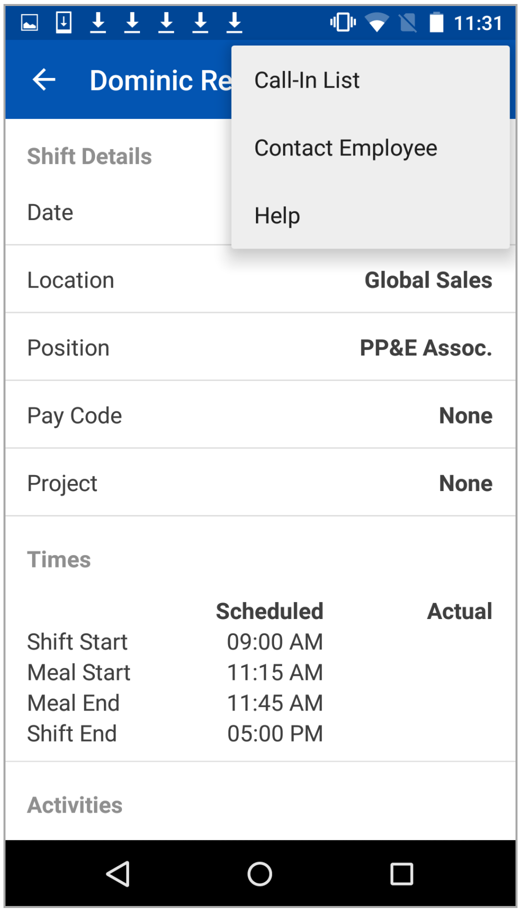
Contacting Employees

In the shift details screen, you can contact the employee by opening the context menu and tapping the **Contact Employee** option. The application displays the employee information screen. Here you can open the context menu and tap an available contact option (e.g., **Send SMS**). When done, tap Back on your mobile device to return to the shift details screen.

Replacing Scheduled Employees

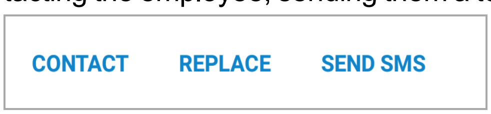
This section describes how to automatically replace an employee who is unable to work an upcoming scheduled shift (i.e., a shift represented by the Scheduled icon ()) with an employee who is available to work the shift. This can be done directly in the **Attendance** feature, as follows:

1. Select the scheduled employee from the attendance list.
2. In the shift details screen, open the context menu and tap the **Call-In List** option:

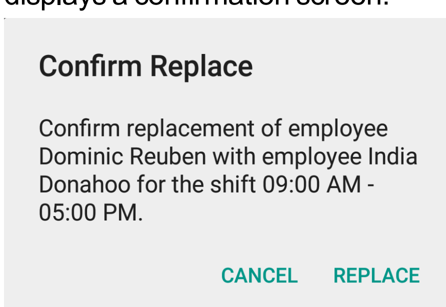


The application displays a list of employees who are eligible and available to work the shift.

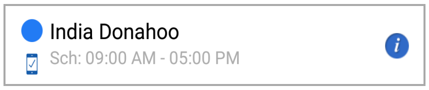
3. When you tap an employee from the list, the application prompts you to choose between contacting the employee, sending them a text message, or replacing them:



4. Do one of the following:
   - Tap **Replace** to replace the scheduled employee with this employee. The application displays a confirmation screen:



When you tap **Replace**, the application replaces the shift. When you open the attendance list, the application now labels the call-in employee you selected with the Scheduled icon ( ) and the Call in Confirmed icon ( ).



- Tap **Contact** > (phone number) to call the employee.
- Tap **Send SMS** to send a text message to the employee.

Note: SMS access authorizations needs to be configured in the main application to the user role(s) responsible for sending SMS call-in notifications to employees.

Editing Punches

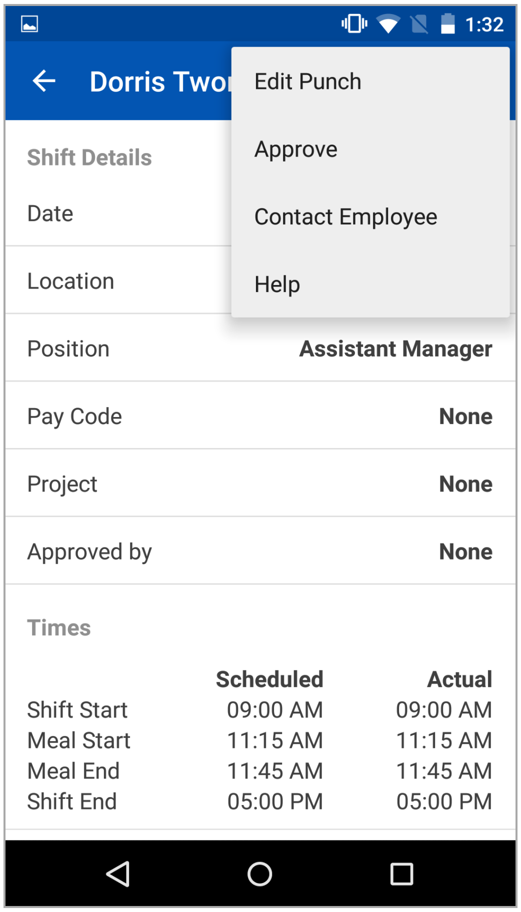
This section shows you how to edit punches to reflect actual work times.

For example, you can add a meal or break to a shift if an employee forgets to record one, or record a transfer if the employee changes work locations during a shift.

To edit punches:

1. Select an employee from the attendance list who is labeled with a shift icon (e.g., an employee who is labeled with the Scheduled (Worked) icon ( ) or Worked (Not Scheduled) icon ( ). The application displays the employee's shift details screen.

   Note: If you select an employee who is not labeled with an attendance icon, the application displays the **New Shift** screen where you can create a new unscheduled shift for the employee. For more information, see **Adding Unscheduled Shifts** on page 69.
2. In the employee's shift details screen, open the context menu:



If the shift already has punches, the application displays the **Edit Punch** option in the context menu.

If the shift has no punches, the application displays the **Add Punch** option in the context menu.

3. Tap the **Edit Punch** or **Add Punch** option.

   Continue to **Updating Punches** below.

Updating Punches

This section describes how to update the following punch information in the **Edit Shift** screen or **New Shift** screen:

- **Update Shift Location, Job or Pay Code** on page 65
- **Update Shift Start and End Time** on page 65
- **Update Meals and Breaks** on page 66
- **Update Transfers** on page 67

When you are done updating information at any time, open the context menu and tap the **Save** button.

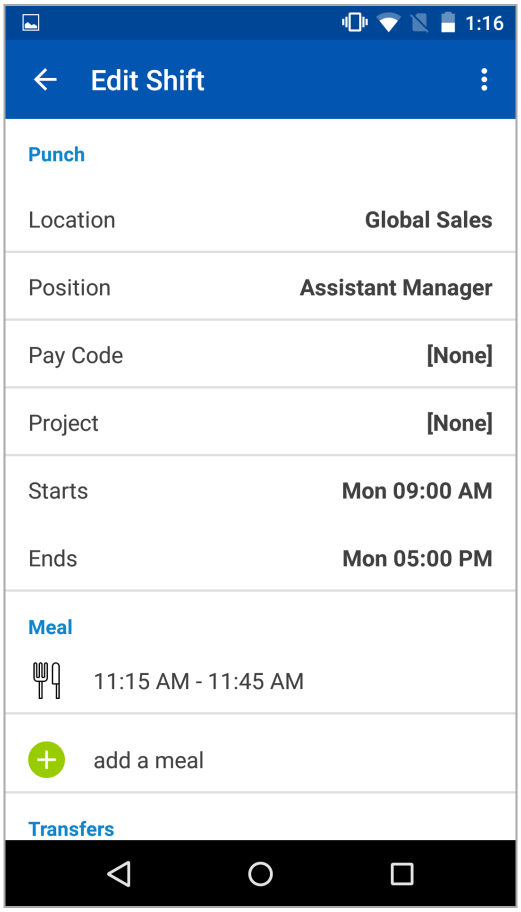
You can delete all information that was recorded in the **Edit Shift** or **New Shift** screen: in the **Edit Shift** or **New Shift** screen, open the context menu and tap the **Delete** option.

To exit the **Edit Shift** or **New Shift** screens, press Back on your mobile device.

Update Shift Location, Job or Pay Code

This section describes how to update the location, job or pay code that the employee's time is recorded against, as follows:

1. In the **Edit Shift** or **New Shift** screen, tap the **Location**, **Position**, **Job**, **Pay Code**, **Docket**, **Labor Metric**, or **Project** button:

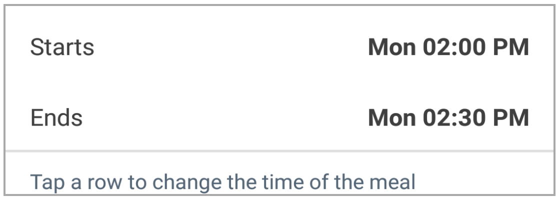
   

   The application displays a list with available options.
2. Tap an option from the list.
   The application returns to the **Edit Shift** or **New Shift** screen.

Update Shift Start and End Time

This section describes how to record when an employee punched in or out of their shift, as follows:

1. In the **Edit Shift** or **New Shift** screen, tap the button under the **Starts** or **Ends** heading.



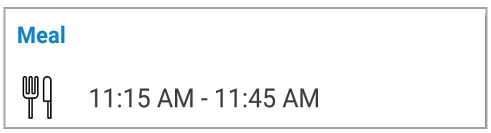
The application displays the **Set time** dialog box.

1. Enter a time and tap **OK**or **Cancel** to cancel your changes.
The application returns to the **Edit Shift** or **New Shift** screen.

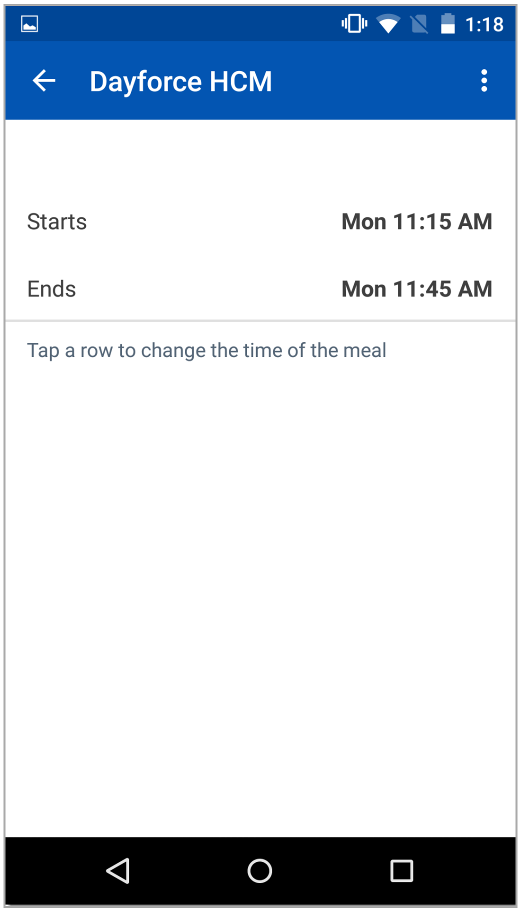
Update Meals and Breaks

This section describes how to update meals and breaks, as follows:

1. In the **Edit Shift** or **New Shift** screen, tap the **Meal** button.



The application displays a screen that lists meals and breaks, if any.
2. Tap an existing break from the list.
The application displays a screen for editing meal or break times.



In this screen, you can update the meal or break time as follows:

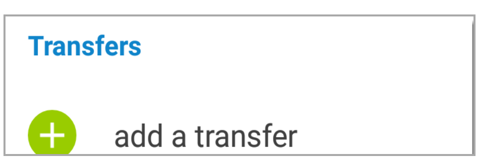
a. Tap the buttons under the **Start** or **Ends** heading.
   The application displays the clock dialog box.
b. Select a time.
c. Tap **OK** to set the time, or tap **Cancel**.
d. Open the context menu and tap the **Save** button.
   The application returns to the Meals/Breaks screen and displays the updated or new meal or break.

3. When done updating meals and breaks tap the Back button on your mobile device to return to the **Edit Shift** or **New Shift** screen.

Update Transfers

This section describes how to update when an employee transferred between positions, pay codes, projects or dockets, as follows.

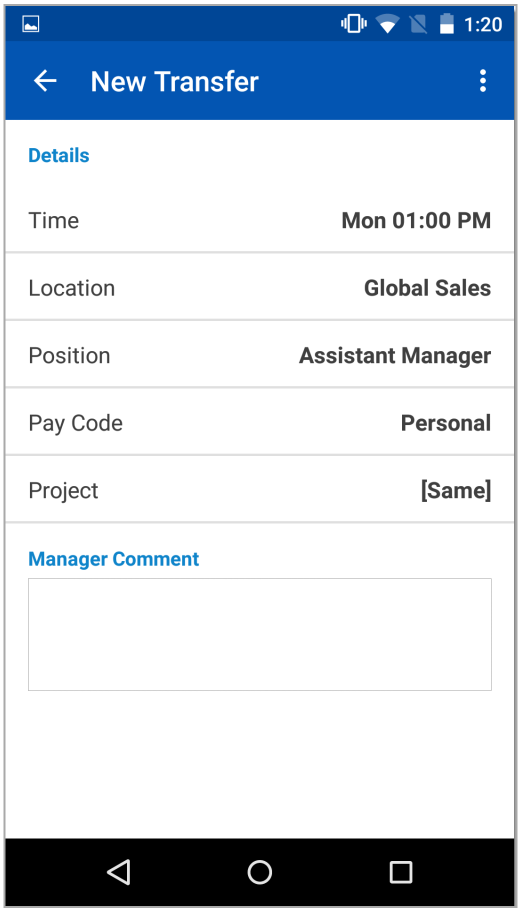
1. In the **Edit Shift** or **New Shift** screen, tap the button under the **Transfers** heading.



The application displays a screen that lists transfers, if any.

2. Tap an existing transfer from the list, or open the context menu and tap the **Add Transfer** option.

   The application displays a screen for updating transfer information, similar to the screen for updating shift information:



Note: In the example above, the application displays the word 'Same' next to the current selection to indicate that it is the selection used in the original shift.

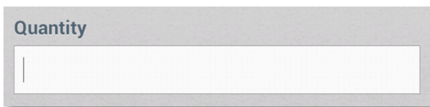
In this screen, you can delete an existing transfer by opening the context menu and tapping the **Delete** option, or;

update the following transfer information:

- **Start Time**: You can record when an employee punched in for a transfer, as follows:
  a. Tap the button under the **Time** heading.
     The app displays the clock dialog box.
  b. Select a time and tap the **OK** button, or tap **Cancel** to erase the time that you entered.
- **Location, Position, or Pay Code**: Select the location, position, or pay code that the employee's time is recorded against, as follows:
  a. Tap the button under the **Location**, **Position** or **Pay Code** heading to open a list.

b. Tap an option from the list.
   The application returns to the transfer information screen.

- **Project or Docket**: Select a project or docket that the employee worked on when transferred, as follows:
  a. Tap **Project** or **Docket**.
     The application displays a list with a search field.
  b. Type the name of your project and tap Enter on your mobile device.
     The application displays filtered list.
  c. Type the name of your project and press Enter on your mobile device.
     The application returns to the transfer information screen.
- **Quantity** Enter the quantity of work that the employee produced for the selected docket in the field under the **Quantity** heading:



- **Labor Metric Information** When you select a labor metric type, the app navigates to a screen with a list of labor metric values where you can perform a search, if needed, and make a selection.

3. When finished updating transfer information, open the context menu and tap the **Save** button.

   The application returns you to the transfer list.

4. When done updating transfers, tap the Back button on your mobile device to return to the **Edit Shift** or **New Shift** screen.

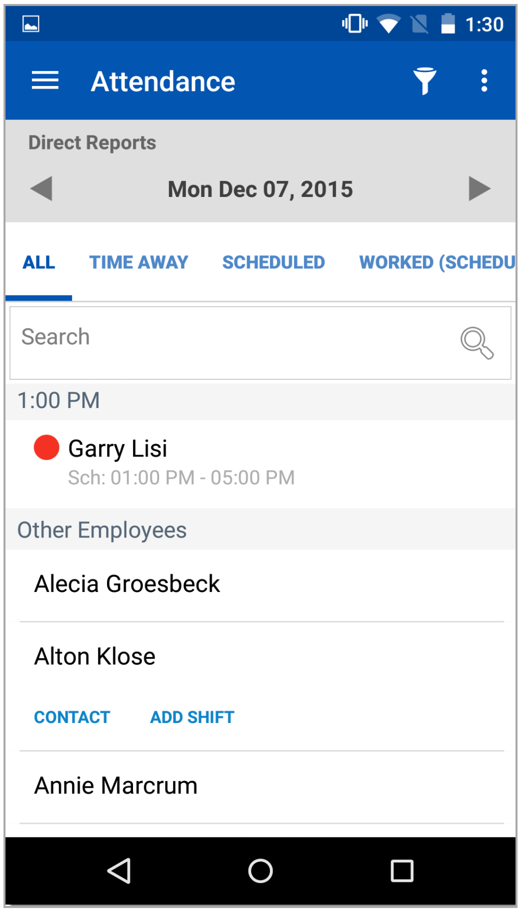
Adding Unscheduled Shifts

This section describes how to add an unscheduled shift, which means adding punches for an employee who worked, but who:

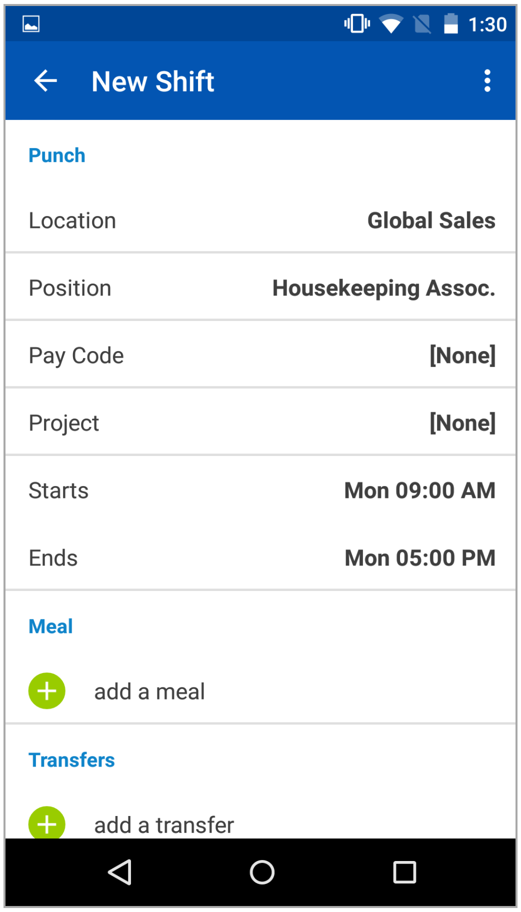
- is not scheduled on the main application, and;
- did not register any punches that day.

Note: You cannot schedule employees in the mobile application (this can only be done in the main application). You can, however, create punches for an employee who worked, which is described in this section.

To add an unscheduled shift, selecting a 'blank' employee from the list, such as Alton Klose in the example below. (To view blank employees you must have the **All** filter selected.)


1:30
Attendance
Direct Reports
Mon Dec 07, 2015
ALL
TIME AWAY
SCHEDULED
WORKED (SCHEDU
Search
1:00 PM
Garry Lisi
Sch: 01:00 PM - 05:00 PM
Other Employees
Alecia Groesbeck
Alton Klose
CONTACT
ADD SHIFT
Annie Marcrum

The application displays a screen for updating shift information:



Continue to **Updating Punches** on page 64.

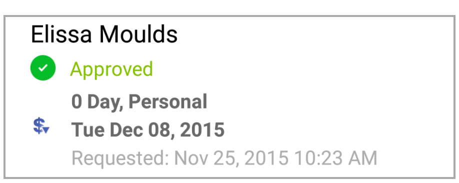
Approving Worked Time

This section describes how to approve employee work time using the **Attendance** feature, so that the shift is marked as approved both in the mobile application and the main application.

This section also provides details about **Managing Multi-Approvals** on the next page.

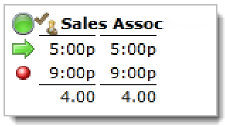
To approve an employee's worked time, touch the shift in the list. Then, open the context menu and select the **Approve** option:

The application returns to employee attendance screen and marks the shift approved:



The application marks the shift as approved in the employee's timesheet.

In the main application, in **My Timesheets**, the application displays the approved icon ( ):



To revoke your approval, open the context menu and tap the **Unapprove** button:

Managing Multi-Approvals

When multi-approval is configured, the Android application functions in the same way as the main application: an employee's worked time is not marked as approved until you approve it, even if another approver has already approved it.

For example, one of your employees works a shift from 9:00 AM to 5:00 PM. At 3:00 PM, the employee transfers to the inventory project. A receiving manager who does not manage the employee directly is responsible for approving all time spent working on the inventory project.

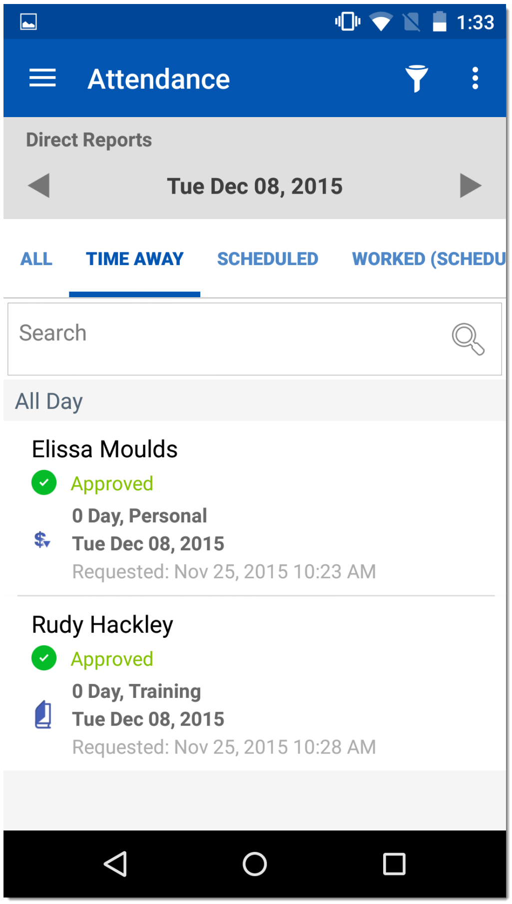
Even if the receiving manager approves the time, the time is not marked as approved when you open the **Attendance** feature until you have approved it. Similarly, if you approve it but the receiving manager has not, it is marked as approved when you view it, but not approved when the receiving manager views it.

Updating Time Away From Work Requests

This section describes how to update the status of time away from work requests directly in the **Attendance** feature, as opposed to exiting the **Attendance** feature and opening the **Time Off List** feature.

To update time away from work request status in the **Attendance** feature:

1. Select the **Time Away** filter.
   The application displays a list of time away from work requests:



2. Tap an employee from the list.
   The application displays the details of the time away from work request.
3. Open the context menu.
   In the context menu, the application displays any status options relevant to the current status of the time away from work request, as follows:

If the status is…	**Then…**
Pending ( )	The **Approve** or **Deny** options are available
Approved ( )	The **Deny** option is available
Denied ( )	The **Approve** option is available
Cancellation Pending ( ) (i.e., the status where employees deleted their time away from work request after it was approved by a manager)	The **Approve Cancellation Pending** and **Cancel Cancellation Pending** options are available
Canceled ( )	The **Approve** option is available

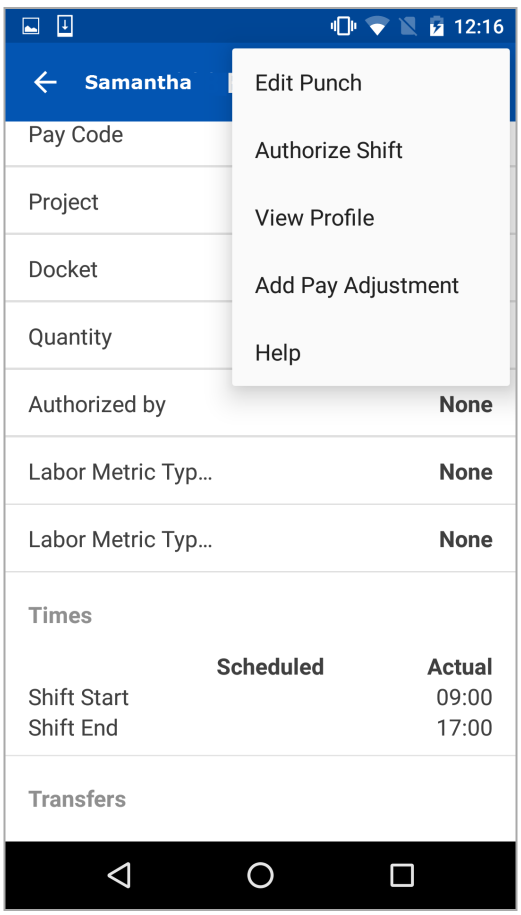
(i.e., the option that reverses the cancellation, returning the time away from work request to the **Approved** status)

4. Tap an option from the context menu.
   The application automatically updates the status of the time away from work request and returns you to the time away from work list.

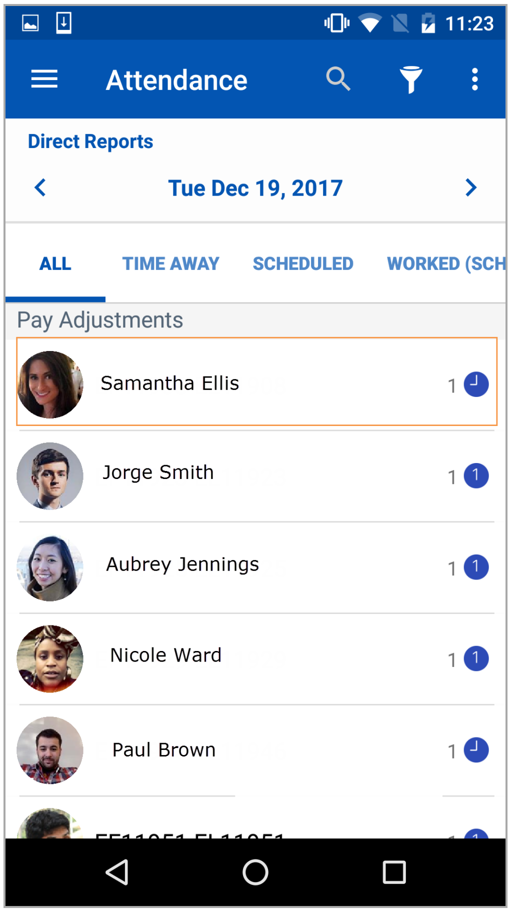
   Note: Depending on how the application was configured, you may need to manually unfill or delete scheduled shifts that overlap with an employee's time away from work request. This can be done using **My Day > Time Off Request Manager** of the main application. For more information, contact your administrator.

Add Pay Adjustment

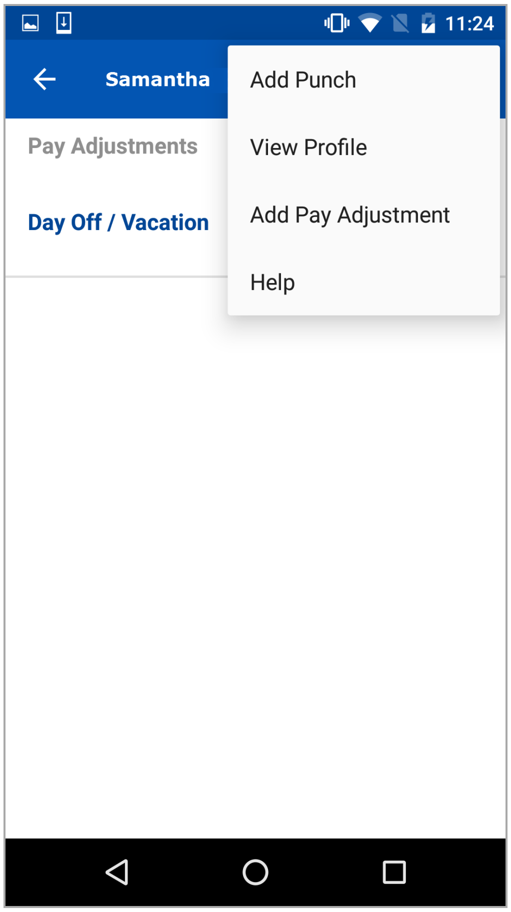
To add a pay adjustment, select the employee and tap **Add Pay Adjustment** from the context menu:



Once the manager adds the pay adjustment, the app displays the **Attendance** home screen with the pay adjustment icon on the employee's row. In addition, the employee is listed in the **Pay Adjustments** section:



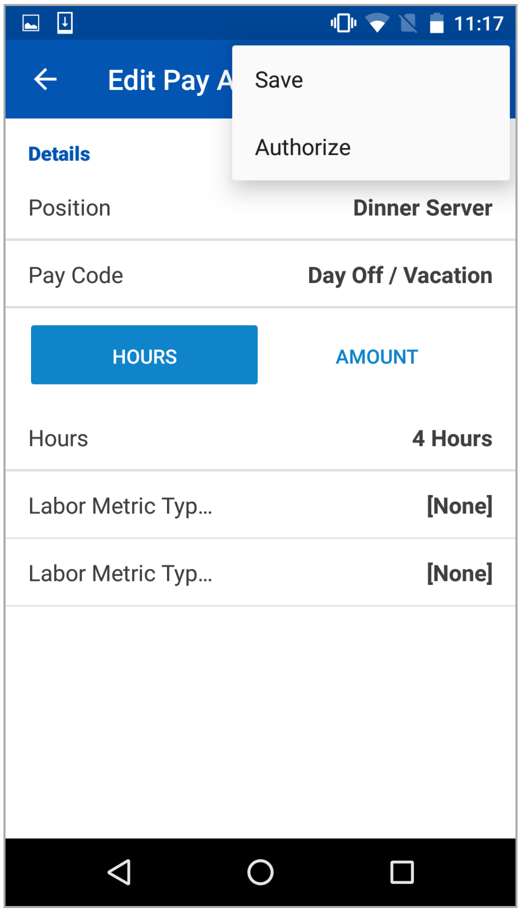
Managers can add multiple pay adjustments by selecting the employee and tapping the **Add Pay Adjustment** option in the context menu:



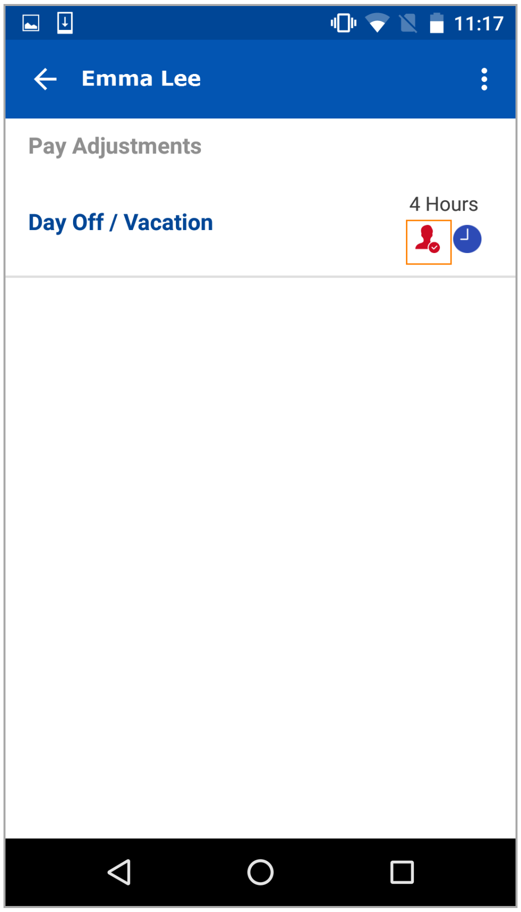
Once the pay adjustment is saved it is listed with the other pay adjustments for the employee, and the pay adjustment icon on the home screen increases to reflect the number of pay adjustments for that employee i.e. ().

Authorize Pay Adjustment

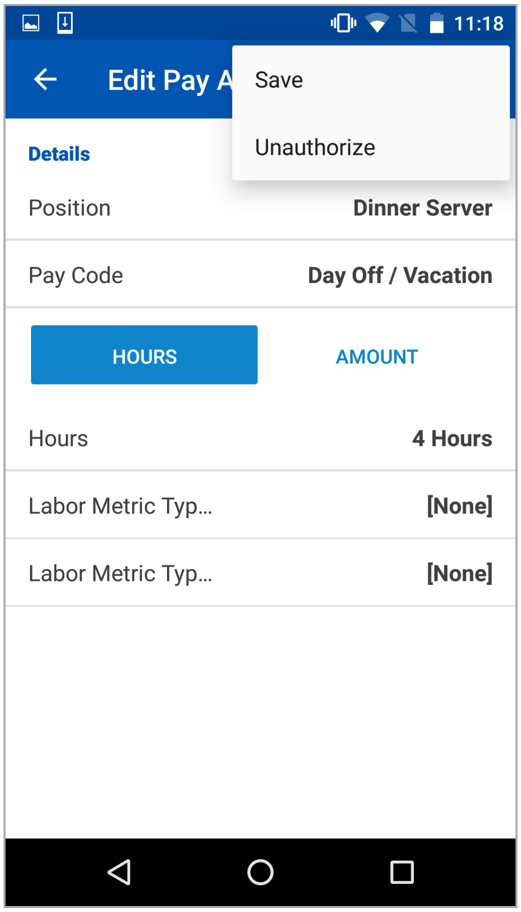
To authorize a pay adjustment, select an employee that has a pay adjustment, edit the shift, and select **Authorize** from the context menu:



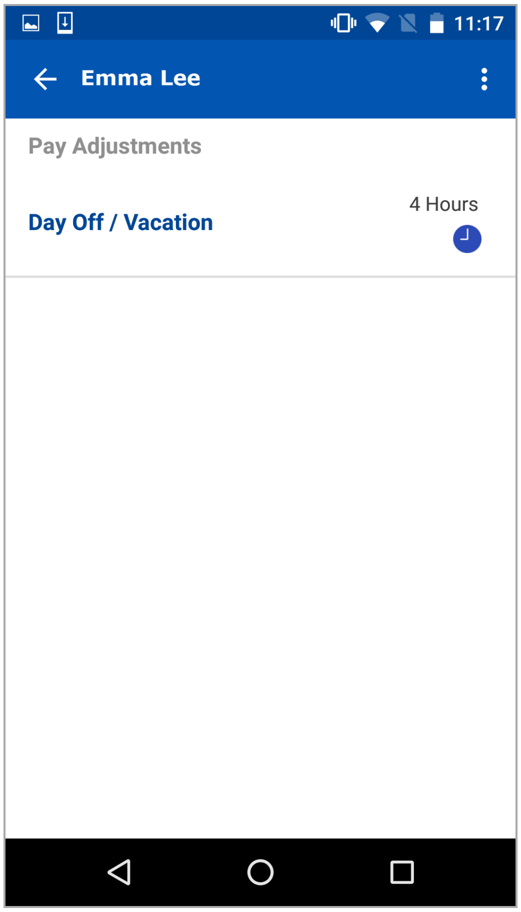
When a shift is authorized, the app displays the authorized pay adjustment icon beside the shift:



When a manager wants to unauthorize a pay adjustment, they edit the shift, and select **Unauthorize** from the context menu:

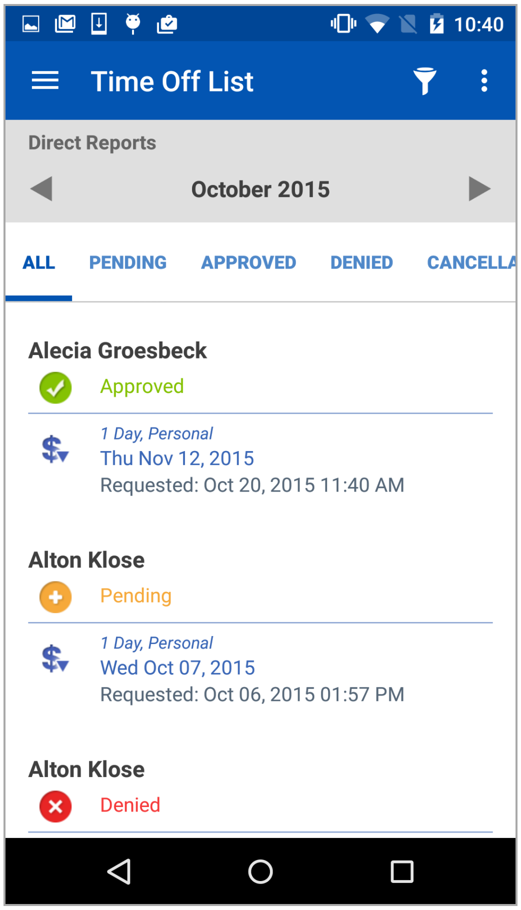


The app then displays the pay adjustment as it was before the authorization:



Manage Time Away From Work Requests

Through the **Time Off List** feature, you can view a monthly list of existing time away from work requests from your employees:



The application displays the following information for each request:

- Employee name
- Status of the time off request (**Approved**, **Denied**, **Pending**, **Cancellation Pending** and **Canceled**)
- Total time off requested (e.g., two days)
- Reason (e.g., vacation, unpaid day off, sick day, etc.)
- Date or date range of the time off request
- Date that the request was created

Select a Different Month

You can tap the arrows at the top of the screen to view attendance for a different month.

Display or Hide Comments

You can toggle displaying comments by opening the context menu and tapping the **Show/Hide Comments** option.

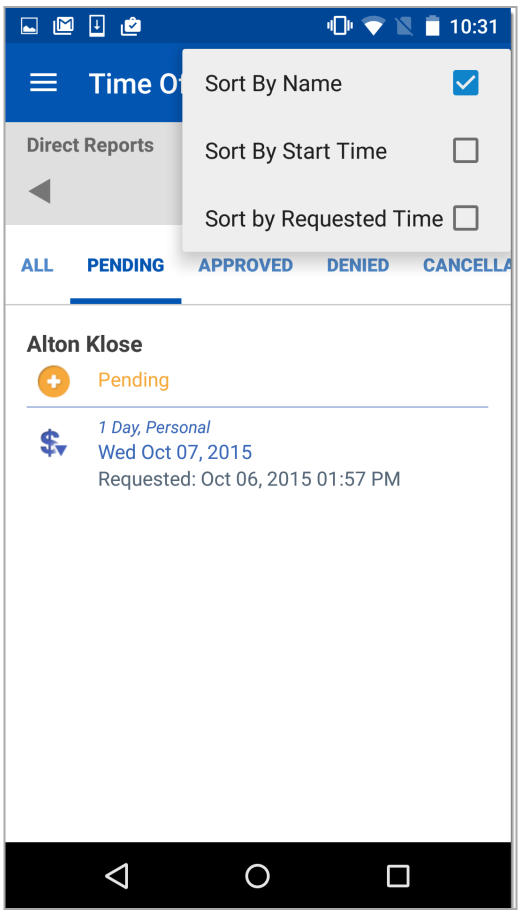
Filter Time Away From Work Requests

You can filter which time away from work requests the application displays. By default, the **All** filter is selected, and the application displays all time off requests.

Swipe the filter left or right to sort requests by their status (e.g., **Approved**, **Denied**, etc.). For example, if you select the **Pending** filter, the application will only display time off requests that have a **Pending** status.

Sort By Name or Time

You can sort requests by opening the context menu on the upper right and then selecting a sort option:



Update Status

You can update time away from work request status as follows:

1. In the time away from work list, tap an employee.
   The application displays the details of the time away from work request.
2. Open the context menu.
   In the context menu, the application displays any status option relevant to the current status of the time away from work request, as follows:

If the status is…	Then…
Pending (●)	The **Approve** or **Deny** options are available
Approved (✓)	The **Deny** option is available
Denied (✕)	The **Approve** option is available
Cancellation Pending (✕) (i.e., the status where employees deleted their time away from work request after it was approved by a manager)	The **Approve Cancellation Pending** and **Cancel Cancellation Pending** options are available
Canceled (✕)	The **Approve** option is available (i.e., the option that reverses the cancellation, returning the time away from work request to the **Approved** status)

3. Tap an option from the context menu.
   The application automatically updates the status of the time away from work request and returns you to the time away from work list.

   Note: Depending on how the application was configured, you may need to manually unfill or delete scheduled shifts that overlap with an employee's time away from work request. This can be done using **My Day > Time Off Request Manager** of the main application. For more information, contact your administrator.

Add a Comment

You can add manager comments to time away from work requests as follows:

1. In the time away from work list, tap an employee.
   The application displays the details of the time away from work request.
2. Enter a comment in the text field under the **Manager Comment**.
3. Open the context menu and tap the **Save** option.
   The application returns you to the time away from work list.

Update the Reason, Start, End and All Day/Half Day Fields

You can edit the **Reason**, **Start**, **End** and **All Day**/**Half** day fields as follows:

1. In the time away from work list, tap an employee. The application displays the details of the time away from work request.
2. Select the desired field and edit the necessary field.
3. Tap the **Save** button.

View Time Away from Work from Messages

If the time away from work request originated in the main application through a workflow, you will be able to view and approve or deny the request directly from the **Inbox** folder in the **Messages** feature.

To approve or deny a time away from work request from your inbox, complete the following steps:

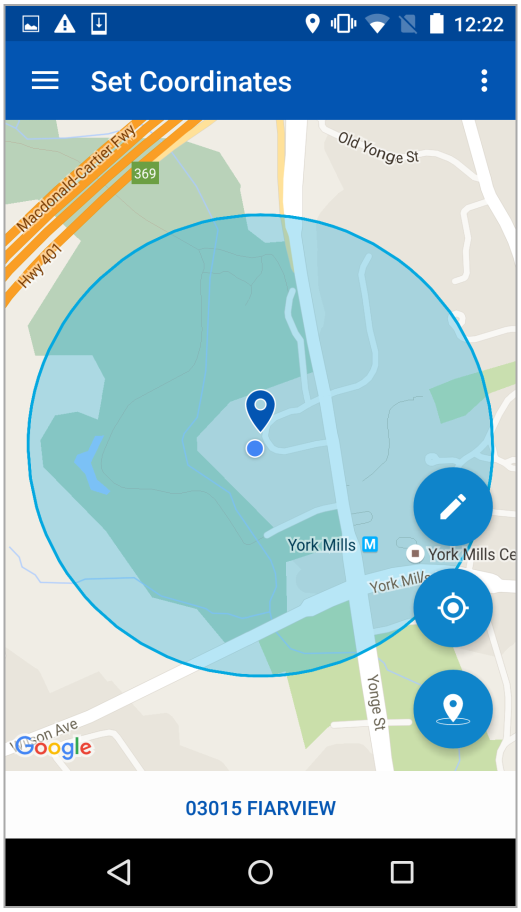
1. From your inbox, tap the time away from work message.
2. Tap the menu on the upper right.
3. Tap **Approve** or **Deny**.

Note: At this time, managers can only **Accept** or **Deny** a time away from work request if accessed through their **Inbox** in the **Messages** feature.

Set Your Coordinates

The **Set Coordinates** feature allows you to define the area in which employees can punch in through the **Clock** feature of their mobile application. You can define how close, in meters, employees must be to your location, in order for the application to accept their punches.

The location can be entered manually, by specifying the **Latitude** and **Longitude**, or your location can be detected automatically using the GPS feature of your mobile device:



Specify the **Punch Tolerance**, in meters, to define how close to the specified point employees must be for their clock punches to be accepted when they clock in through the application.

Tap **Time Zone** and select your local time from the list to define the time zone that punches are recorded in.

Can't Detect your Location?

You can't automatically detect your location if the Location & security settings for your device are turned off, or if you denied the app access to your location. To use the Set Coordinates feature on Android devices configure the following in **Settings** > **Location** on your device:

- Use Google Play services to grant access to location services on your device.
- Set your location detector to "high accuracy".

Feature Highlights

- The primary way to edit coordinates is through map based location display.
- If you set your location to off, or if the accuracy is low, a warning message is displayed. You have the option to not turn location to high accuracy.
- Location accuracy has been improved by disabling the punch-in buttons until the location is found. This stops you from punching in with a bad location and generating an error message.
- You have the option to edit coordinate values manually or on the map.
- The map displays the previous set location and the new location being set.
- You have the option to switch views between standard map, satellite, and hybrid mode.
- The app launches the location picker if there is no default location.
- You have the option to change your filter selection for your current location.
- The current org is detected and loaded by default.

Note: Your default org is driven by what was set earlier in other features in the mobile app.

Set Coordinates Icons

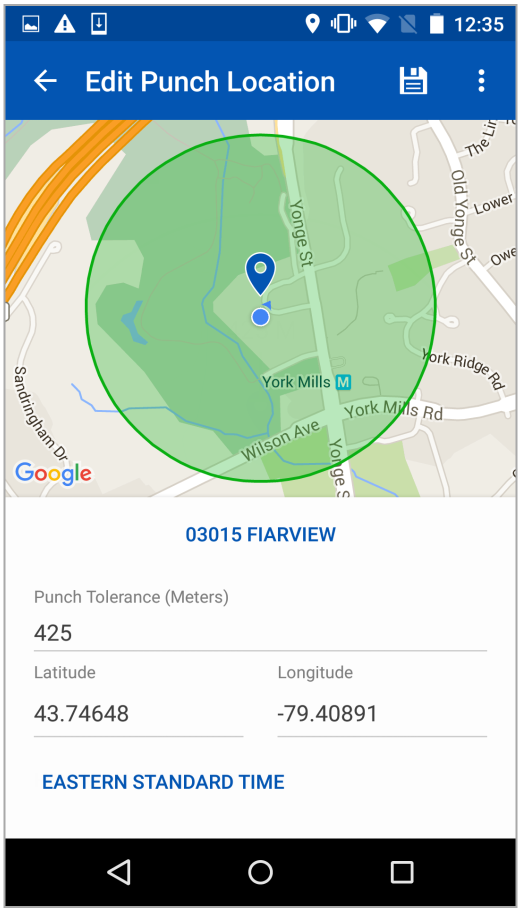
	Re-center your map on the previously saved location.
	Highlight your current location.
	Edit.
	Current location on the map.
	Context menu - **Help**, **Choose Location**, change views (**Standard**, **Satellite**, **Hybrid**).

Set up a New Clock Coordinate

When you open the **Set Coordinates** feature the app launches the location picker if a default location was not configured. If you already have a default org set up, when you open the **Set Coordinates** feature, the app launches the map with the default location loaded.

Set up a new clock coordinate by doing the following:

1. In the location picker, select a location and then tap the checkmark icon to save your choice.
2. On the map screen, tap the edit icon .
3. Specify your new location by doing one or both of the following on the **Edit Punch** screen:
    a. Use your finger to move the map around, and/ or pinch your two fingers together to zoom in and out until you find your desired location.
    b. Tap the displayed location name at the bottom of the screen to open the info panel. Edit the time zone, **Punch**, **Latitude** or **Longitude**.

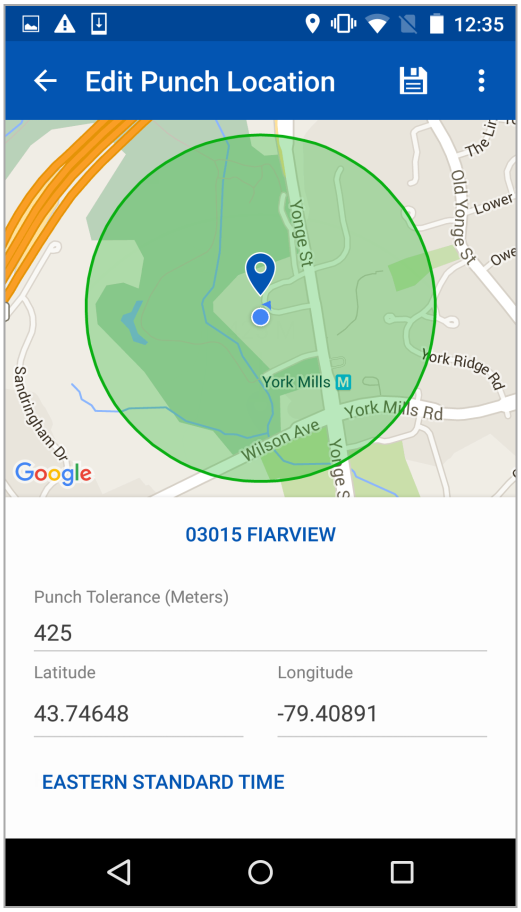


4. Tap the save icon.

Update Existing Clock Coordinates

Update existing clock coordinates by doing the following:

1. On the map screen, tap the menu icon on the upper right .
2. Tap **Choose Location** to open the location picker.
3. In the location picker, select a location and then tap the checkmark icon to save your choice.
4. On the map screen, tap the edit icon .
5. Specify your new location by doing one or both of the following on the **Edit Punch** screen:
   a. Use your finger to move the map around, and/ or pinch your two fingers together to zoom in and out until you find your desired location.
   b. Tap the displayed location name at the bottom of the screen to open the info panel. Edit the time zone, **Punch**, **Latitude** or **Longitude**.



6. Tap the save icon.

Manage Tasks

Your organization can use Dayforce's task management to create and track the various tasks locations need to perform. Typically, tasks are created by upper level management, such as district or region managers, and assigned to the different locations that need to complete them. The **Tasks** feature allows you to view and update task information for tasks that have been assigned to your location, through your mobile device.

Tasks

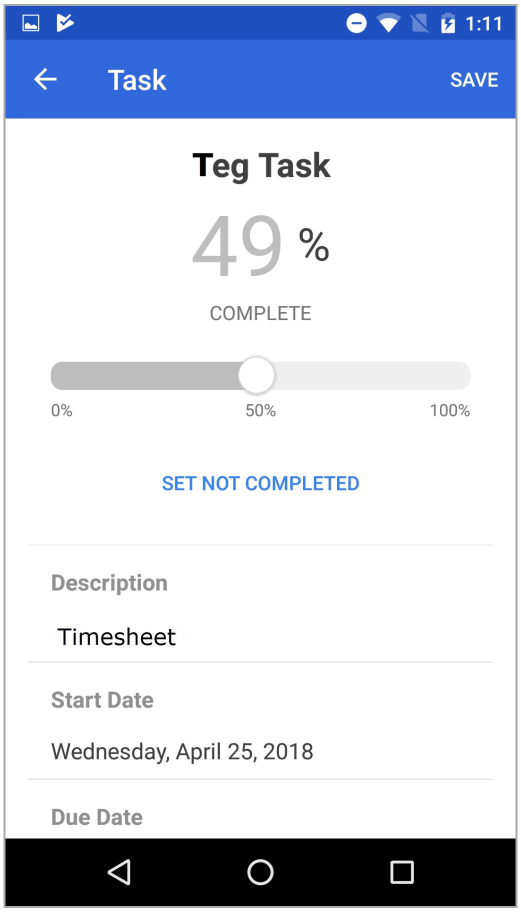
Each task is listed on the **Task** feature's landing screen, and is displayed under the following applicable tabs: **All**, **Not Started**, **In Process**, **Completed**, and **Not Completed**. Tasks can be edited and updated as needed.

Update Tasks

Do the following to update tasks:

1. Select a task to view its details;
   - You can update the percentage of the task that is **Complete**, by adjusting the slider interface for the parameter. Adjusting the percentage also impacts the task **Status**.
   - You can add any applicable **Notes** by touching '**Notes**'.
2. When you are finished updating the task details, touch **Save**.

   Note: If you complete a task by updating the percentage to %100, the **Completed By** field gets populated in the main application.



Date Range Picker

The date range picker is a control which allows you to specify a date range for the tasks you want to view. You can specify a range within a month, across months or across years. Once you finish making your selection, the list of tasks reloads to reflect the new dates. The following points apply to the date range picker:

- The start date cannot be less than 1 year ago from today.
- The start date cannot be after the end date.
- The end date cannot be before the start date.
- The duration between the start date and end date cannot exceed 1 year.

Note: The date range you set is not the date range that will be used every time you use the **Tasks** feature. Instead, the main application determines the start date and uses the duration between the start date and end date to figure out what the end date should be.

Specify a Date Range for a List of Tasks

Do the following to specify the date range for a list of tasks:

1. Tap the displayed date on the toolbar to open the date range picker.
2. Tap a start date or swipe to the month/ year that you want to select.
3. Tap an end date (If needed, swipe to the month/ year). The app highlights the date range that you specified.

   Note: If you want to deselect the highlighted date range, go to the date you want to select and tap it.
4. Tap **Done**.

The app lists the tasks that fall within the date range.

TeamRelate

TeamRelate is designed to provide insight into your communication style, and how you can adapt your style to better communicate with your team. With its integration into Dayforce, you can access this information directly within the app, providing a single user experience.

About TeamRelate

There are two main components to a TeamRelate profile: communication style and core convictions. These are described in the next two sections.

Communication Styles

Your communication style is the set of behaviors that you naturally gravitate toward when you communicate. There are four communication styles:

- Director - Direct, driven, and fast-paced.
- Encourager - Enthusiastic, warm, and optimistic.
- Facilitator - Calm, patient, and deliberate.
- Tracker - Careful, tactful, and accurate.

Core Convictions

Your core convictions are the motivators for your behavior. There are four core convictions:

- Ambition - Motivated by continual improvement for themselves and their organization.
- Belief - Motivated by integrity and ethical standards for themselves and within their workplace.
- Compassion - Motivated by helping others.
- Discipline - Motivated by the completion of tasks or goals.

TeamRelate Survey and Profile

Once you complete the TeamRelate survey, you can view your communication style, and check in directly from the mobile app.

- When you first log in, there is a link to complete the TeamRelate survey.
- When you complete the survey, your TeamRelate profile is created.
- Your TeamRelate traits are displayed in the navigation panel beside your avatar.
- You can Check in to give feedback on your day. This generates your personal engagement score and can provide valuable information to colleagues looking to interact with you.
- Managers can view their employee's TeamRelate trait details and suggestions on how to give feedback, motivate, and navigate conflict based on those traits.

TeamRelate Survey Link

The first time you log in, you can access the link to complete the TeamRelate survey from the widget on the home screen, and in **My Profile**.

Take the TeamRelate Survey

1. Answer each question by moving the slider to the left or right.
2. Go to the next or previous question by tapping on the arrow on the left or right.

- The survey consists of 50 questions.
- You cannot go to the next question until the current answer is selected.
- All survey questions must be answered before you can save your survey. You cannot save your survey if it is incomplete.
- When you complete the survey your TeamRelate profile is created in the **My Profile** feature.

Re-take the TeamRelate Survey

You can retake the survey at any time if you don't agree with the results or if you want to update your traits. Do the following to re-take the TeamRelate survey:

1. In the navigation menu, tap **My Profile**.
2. In the **Personal Engagement** section, tap the info icon (ⓘ)to open your TeamRelate profile.
3. In the **TeamRelate Profile** screen, scroll to the bottom.
4. Tap the **Retake Survey** link.

TeamRelate Traits in the Navigation Panel

The app displays your TeamRelate traits in the navigation panel, beside your avatar. The following points apply:

- If you haven't taken the survey, your traits are not displayed in the navigation panel.
- To open TeamRelate details in **My Profile**, tap the avatar. If your role does not have access to **My Profile**, the app remains on the same screen.
- If you have more than one role, your traits are displayed for all roles listed in the navigation panel.

Checking In

Checking in allows you to give feedback on your day, and generates your personal engagement score. This feedback can provide valuable information to colleagues looking to interact with you.

Note: The check in option is available after you complete the survey.

The check in links are on the **Home** screen widget and in **My Profile**. The app displays the results of your last check in, thus if you never checked in, the check in link is displayed without a personal engagement score.

Note: The Check in widget is displayed in the app by default. If you do not want the widget to be displayed, you can configure it.

To check in, do the following:

1. Tap the widget on the **Home** screen, or the link in **My Profile**.
2. On the check in screen, use the sliders to specify the levels for each personal engagement attribute.
3. Tap **Save** when you are finished.
   Your personal engagement score is displayed.

View Employee Profiles and Toolkits

As a manager, you can view the TeamRelate traits of your employee's. In addition, you can also view suggestions on how to give feedback, motivate, and navigate conflict based on the employee's communication style and core convictions.

To view employee TeamRelate profiles, do the following:

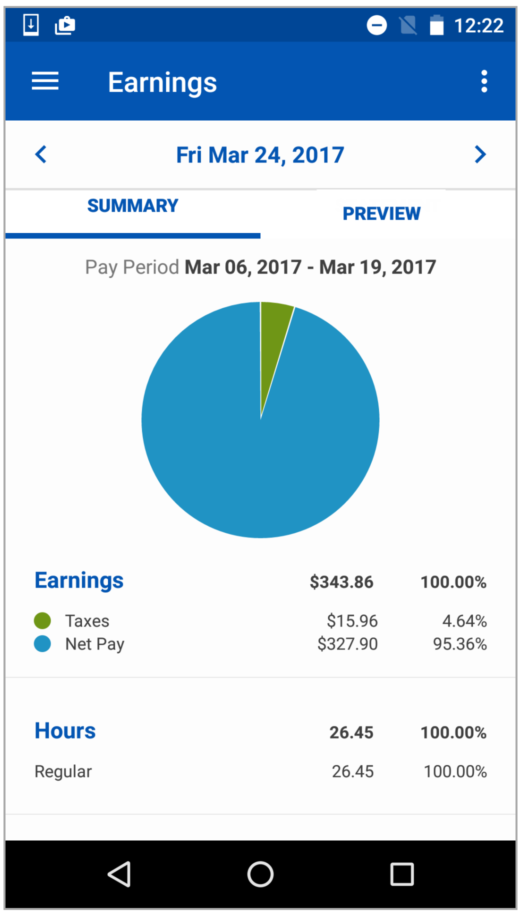
1. In the navigation menu, tap the **Employees** feature.
2. Select an employee from the list who has TeamRelate traits displayed.
3. Tap the info icon ( )to open their TeamRelate Profile.
4. Tap the toolkit icon ( )to view their Toolkit.
   The toolkit screen is divided into 4 separate tabs:

- How to give feedback.
- How to motivate.
- How to maintain compatibility.
- How to resolve conflict.

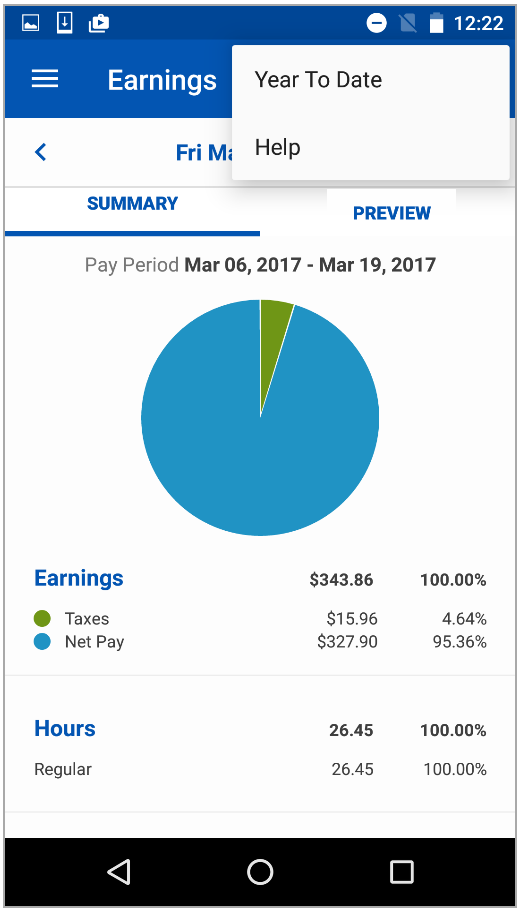
5. Tap each tab to review the suggestions on how to approach the employee based on their traits.

View your Earnings Statement

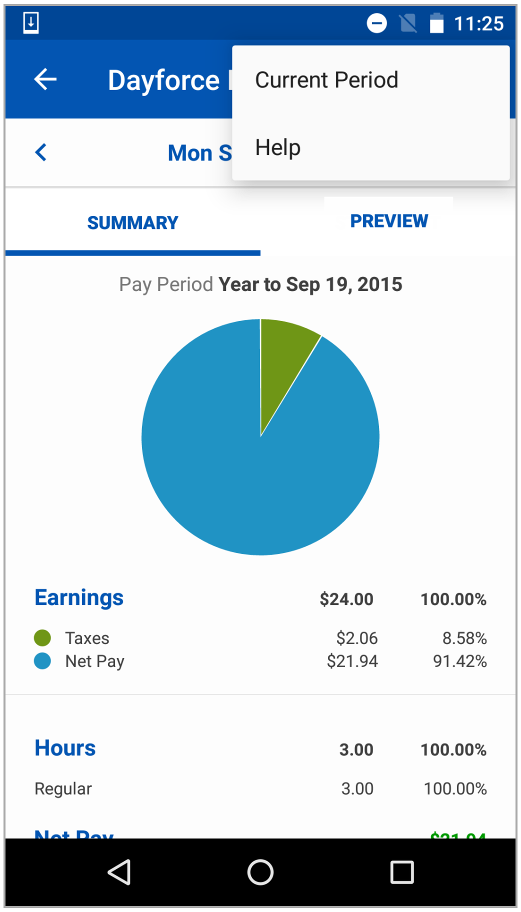
The **Earnings** feature allows you to view a mobile version of your earnings statement, which is available in the main application on the **My Earnings** tab. When you first open the **Earnings** feature, after you select the pay period that you want to view, the app displays the **Summary** tab which consists of your **Net Pay**, **Hours**, and **Earnings**, using a pie chart:



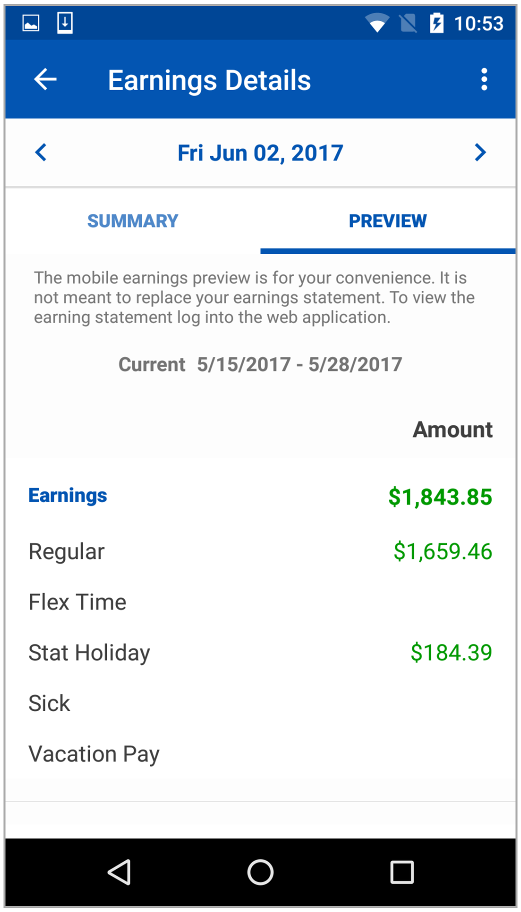
Tap the context menu on the upper right to switch views to display the **Year To Date** in a pie chart summary:



Switch back to display the **Current Period** by selecting it from the context menu:



Tap the **Preview** tab to see your earnings statement for the pay period that you selected:



You can navigate between periods either using the arrows at the top of the screen, or by swiping across the screen.

Note: When you open the **Earnings** feature, and there are no results the app displays a **No Data Available** message.

View Your Profile

You can view and edit your employee information such as your address, phone numbers, and emergency contact information in the **My Profile** feature.

Note: Access to viewing certain contact information is configured through the application. If you do not see certain information and believe that you should, contact your manager or system administrator.

Depending on how the application has been configured, you might also be able to change your password.

Add and Edit Phone Number Data

You are able to add, edit, and delete phone number data. The following fields are available:

- **Phone Numbers**:
  - **Type** (mandatory)
    - Home (default)
    - Mobile
    - Business fax
    - Business mobile
    - Business
    - Personal fax
    - Pager
    - TTYTDD
  - **Country Codes** (mandatory)
  - **Phone Number** (mandatory)
  - **Extension** (optional)
  - **Alerts** (optional)
  - **Unlisted** (optional)

Notes

- There is no limit to the number of phone numbers that can be added.
- Mandatory fields are marked with an asterisk(*).

Configuration

Employees - To add and edit contacts using the **My Profile** feature:

- Configure role access in **System Admin** > **Roles** > **Features** > **Mobile** > **My Profile** > **Direct Edit Contact Information** in the main application.
- Set authorizations to read, create, edit, or delete Profile data in **System Admin** > **Roles** > **Authorizations** > **Employee Contact Information** in the main application.

Add a Phone Number

1. Tap the edit icon.
2. In the **Phone Numbers** section, tap **Add Phone Number**.
3. Select the **Phone Number Type**.
4. Tap to select the country code.
5. Tap the phone number field to type in a phone number and extension if applicable.
6. In the **Alerts** field slide the button to the right if you want to receive alerts.
7. In the **Unlisted** field slide the button to the right if you want the number to be unlisted.
8. Tap **Save**.

Add and Edit Email Address and Online Profile Data

You are able to add, edit, and delete **Email Address** and **Online Profile** data. The following fields are available:

- **Email Address**
  - **Type** (mandatory)
    - Business
    - Personal
  - **Email address**
  - **Alerts**
- **Online Profile**:
  - **Type** (mandatory)
    - Twitter
    - Facebook
    - Business Twitter
    - LinkedIn
  - **Profile Address** (mandatory)

Notes

- There is no limit to the number of email addresses and online profile that can be added.
- Mandatory fields are marked with an asterisk(*).

Configuration

Employees - To add and edit contacts using the **My Profile** feature:

- Configure role access in **System Admin** > **Roles** > **Features** > **Mobile** > **My Profile** > **Direct Edit Contact Information** in the main application.
- Set authorizations to read, create, edit, or delete profile data in **System Admin** > **Roles** > **Authorizations** > **Employee Contact Information** in the main application.

Add an Email Address

1. Tap the edit icon.
2. In the **Email Address** section, tap **Add Email Address**.

   Note: If you want to edit an existing email address skip step 2.
3. Tap to add the **Email Address Type**.
4. In the **Email Address Types** screen, tap to choose a type.
5. In the **Email Address** field, type in your email address.
6. In the **Alerts** section, slide the button to the right to subscribe to alerts.
7. Tap **Save**.

Add an Online Profile

1. Tap the edit icon.
2. In the **Online Profile** section, tap **Add Online Profile**.

   Note: If you want to edit an existing email address skip step 2.

3. Tap to add a profile type.
4. In the **Online Profile Types** screen, tap to choose a type.
5. In the **Profile Address** field, type in your profile address.
6. Tap **Save**.

Add and Edit Emergency Contacts

You are able to add, edit, and delete your emergency contacts. The following fields are available for emergency contacts:

- **First Name** (mandatory)
- **Last Name** (mandatory)
- **Relationship** (mandatory)
- **Email** (optional)
- **Business Phone** (optional)
- **Home Phone** (optional)
- **Mobile Phone** (optional)

Notes

- There is a limit of 2 emergency contacts. If 2 emergency contacts already exist the option to add or import an emergency contact is not displayed until you delete a contact.
- At least one phone number type is required (business, home, or mobile).
- Character length limit for **First Name** and **Last Name** fields is 64.
- Character length limit for **Email Address** is 250.
- String length limit for phone numbers is 30 (excluding brackets, spaces, dots and dashes).
- String length limit for international phone numbers is 15 (excluding brackets, spaces, dots and dashes).

Configuration

Employees - To add and edit emergency contacts using the **My Profile** feature:

- Configure role access in **System Admin** > **Roles** > **Features** > **My Profile** in the main application.
- Set authorizations to read, create, edit, or delete emergency contacts in **System Admin** > **Roles** > **Authorizations** > **Employee Emergency Contacts** in the main application.

Add Emergency Contacts Manually

1. Tap the edit icon.
2. In the **Emergency Contacts** section tap **Add Emergency Contact**.
3. In the **Add Emergency Contact** option list select **Add Contact Manually**.
4. In the **First Name** field type in the first name.
5. In the **Last Name** field type in the last name.

6. In the **Relationship** field choose an option from the pop-up screen.
7. In the **Email Address** field optionally type in an email address.
8. Type in a phone number for at least one of the phone number types: **Mobile**, **Home**, or **Business**.
9. Tap **Save**.

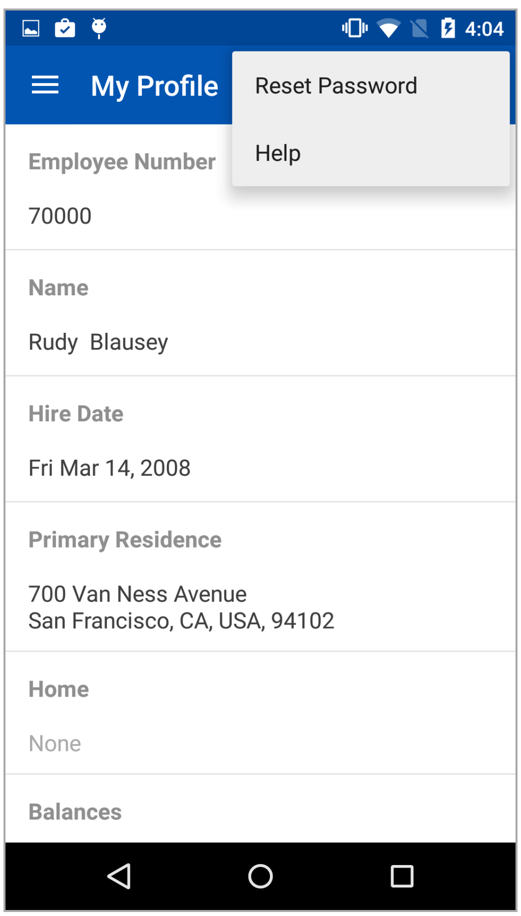
Import Emergency Contacts from your Mobile Device's Contacts

1. Tap the edit icon.
2. In the **Emergency Contacts** section tap **Add Emergency Contact**.
3. In the **Add Emergency Contact** option list select **Import From Contacts**.
4. In the **All Contacts** screen select a contact.
5. In the confirmation screen confirm the contact information.
6. Optionally, edit the fields that have missing information.
7. Tap **Save**.

Note: The app displays a pop-up warning message if mandatory fields are not filled out.

Change Your Password

If the **Reset Password** option is displayed in the context menu, you can change your password.



In the fields provided, type your original password, and then type your new password twice.

When you tap the **Save** button, the application verifies that the password you entered meets your organization's password requirements. If the password you entered does not meet the requirements, the application prompts you to enter a different password.

Set up your Security Questions

You can set up your own security questions that you need to answer if you forget your login password.

Configuration

To enable the security question set up by users, configure the following in the main application:

System Admin > **Roles** > **Features** > **Mobile** > **My Profile** > **Security Questions**

Set up your Security Questions

Set up your security questions by doing the following:

1. Navigate to **My Profile** > **Update Security Questions**.
2. Enter your password.
3. Answer security questions number #1 and #2.

   Note: You can change your current security questions by tapping the question to open question option list. There is a checkmark beside the chosen question.

4. Tap **Save**.

Delegation

Authorized managers can delegate access to user accounts. Delegation might become necessary when an employee requests an extended leave of absence, thus it might be necessary to delegate access to their user account. For example, a user with access to an employee's account can log in and authorize timesheet entries to ensure that the employee will be paid for their time worked before their absence. A user account can be delegated to an HR professional, manager, or an authorized employee.

Before You Begin: The delegate needs to have access to the user account.

Additional Information

The following points apply to a delegation:

- Managers can cancel a delegation.
- Managers can edit an existing delegation and change any of the values.
- It is possible to have more than one delegate active for the same period. For example, delegate #1 has access to pay information, delegate #2 has access to documents.
- A user can be a delegate for multiple employees at the same time.

Setup a Delegate

Take the following steps to setup a delegate:

1. In the **My Profile** screen, tap the **Delegation Access** button.
2. In the **Delegation Access** screen, tap the new button.
3. Tap the **Employee** field to select an employee that you want to give delegation access to.
4. Tap the **Reason** field to specify a reason from the list of reasons.
5. Specify the dates for the **Effective From** and **Effective To** fields.
6. Move the switch on or off to **Restrict Pay Information**.
7. Move the switch on or off to **Restrict PII documents**.
8. Tap **Save**.

Take the following steps to edit a delegate:

1. In the **My Profile** screen, tap the Delegation Access button.
2. In the **Delegation Access** screen, tap the delegate that you want to edit.
3. In the **Edit Delegate** screen make your edits.
4. Tap **Save**.

Take the following steps to delete a delegate:

1. In the **My Profile** screen, tap the **Delegation Access** button.
2. In the **Delegation Access** screen, tap the delete icon beside the delegate that you want to delete.
3. In the confirmation dialog box, tap **OK** to confirm.

Configure Maximum Delegation

There is a client property where you specify a number for the maximum delegation duration. Therefore, when you specify a date range in the **Add Delegate** screen in the mobile app, the app does not allow you to select a date range for the **Effective Period** date picker that goes beyond the maximum duration that was set in the client properties.

Configuration

Set the maximum delegation duration in the following location in the main application:

System Admin > Client Properties > General Properties > Delegation Duration Maximum (in Days).

Enter a whole number in the text field.

Configure Delegation Exclusion

When you tap the employee field to make your delegation selection, the app displays only the employees that were not excluded from delegation. There is a role property where you specify the roles that you want to exclude from delegation.

Configuration

Specify the roles that you want to exclude from delegation in the following location in the main application:

System Admin > Roles > Properties > Exclude Employees with this Role from Delegation.

View Your Payroll Card Transactions

The **Payroll Card** feature allows you to view transactions on your Comdata Payroll Card.

Touch the arrows at the top of the screen to load different periods.

Employee Guide

Through the mobile application, employees can view and update their available hours, review their schedule, and make time away from work requests.

As an employee, you can perform a number of tasks through the mobile application:

- **View Your Profile** on page 116
- **Review and Sync Your Calendar** on page 142
- **Review Your Weekly Availability** on page 129
- **Clock In and Out** on page 137
- **Request Time Away from Work** on page 139
- **View and Edit Your Timesheet** on page 164
- **Messages** on page 108
- **View your Earnings Statement** on page 174
- **View Your Payroll Card Transactions** on page 178

Push Notifications

If configured, the app displays push notifications on your mobile device for the following reasons:

- When you receive a message.
- When there are changes to your schedule.

Configuration

To receive push notifications you need to have role feature access to the associated features:

Enable role feature access for message notifications in the main application in **System Admin** > **Roles** > **Features** > **Mobile** > **Messages**.

Enable role feature access for schedule push notifications in the main application:

- Enable the **Schedules** feature in **System Admin > Roles > Features > Mobile > Schedules**.
- Enable the **Calendar** feature in **System Admin > Roles > Features > Mobile > Calendar**.

  The **Calendar** feature is not required to receive schedule push notifications.

Mobile App Notification Settings

Enable message notifications in your mobile app by doing the following:

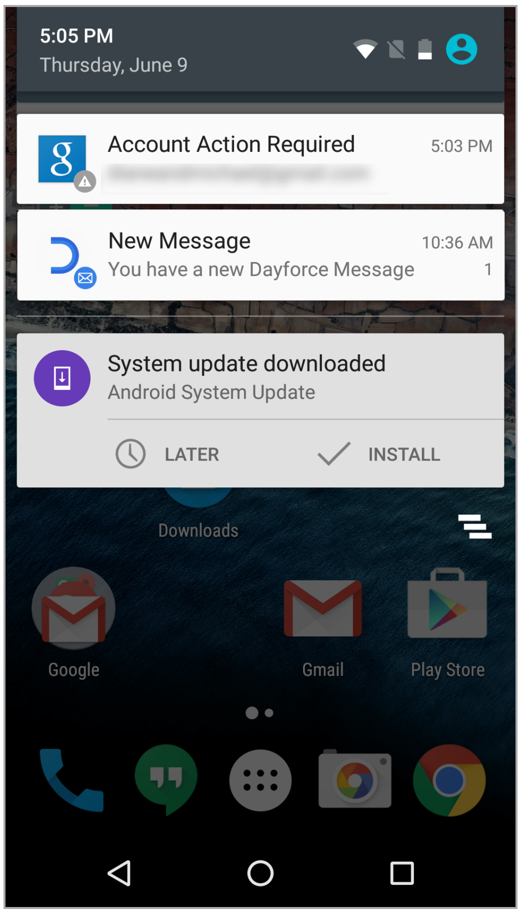
1. Navigate to **Settings > Push Notifications**.
2. From the list of notification types, add a checkmark by tapping the notification that you want to want to receive.

Note: These settings must be saved for each user instance.

Note: Notifications are not displayed on the login screen in the app.

Message Notifications

When you receive a message, you get a push notification on your mobile device. In addition, if a message is received while you are using the app, a pop-up notification is displayed on the screen:

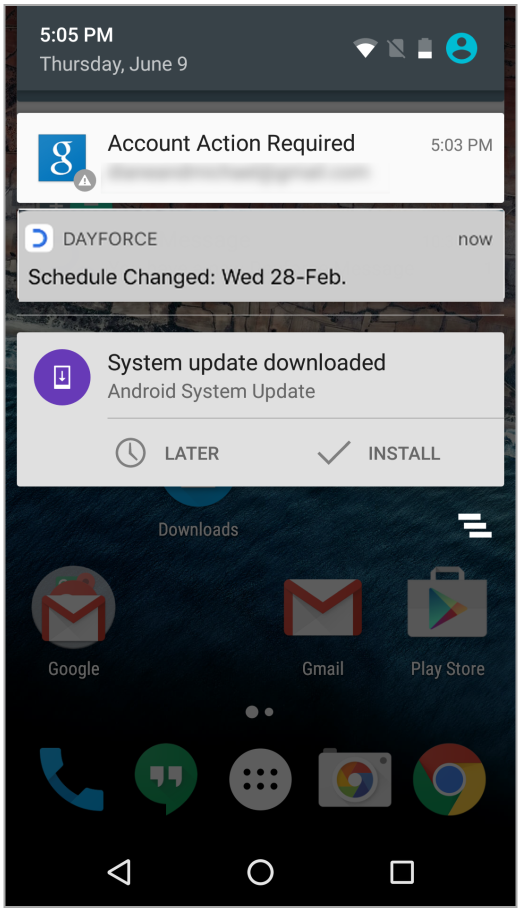


When you tap the notification, the message is displayed in your Inbox in the **Messages** feature.

Note: To use this feature, you need to have access to the **Message Center** feature in the main application.

Schedule Push Notifications

The app displays push notifications when there are changes to your schedule. Schedule push notifications help you to quickly review your schedule changes instead of scanning for changes manually. The app displays schedule push notifications on the home screen of your mobile device:



When you tap the notification, the app opens your **Calendar** feature. If the **Calendar** feature is not enabled for your role, the app opens your **Schedules** feature:

Note: The **Schedules** feature needs to be enabled in the main application to receive schedule push notifications.

Note: The **Calendar** feature is not required to receive schedule push notifications.

Calendar Feature

If you have both the **Calendar** and **Schedules** features enabled, when you tap a push notification, the app opens the **Calendar** feature. All days with shift changes have a blue background highlight within the calendar. When you tap on any of those days, the shift information below the calendar has the same blue highlight.

Schedules Feature

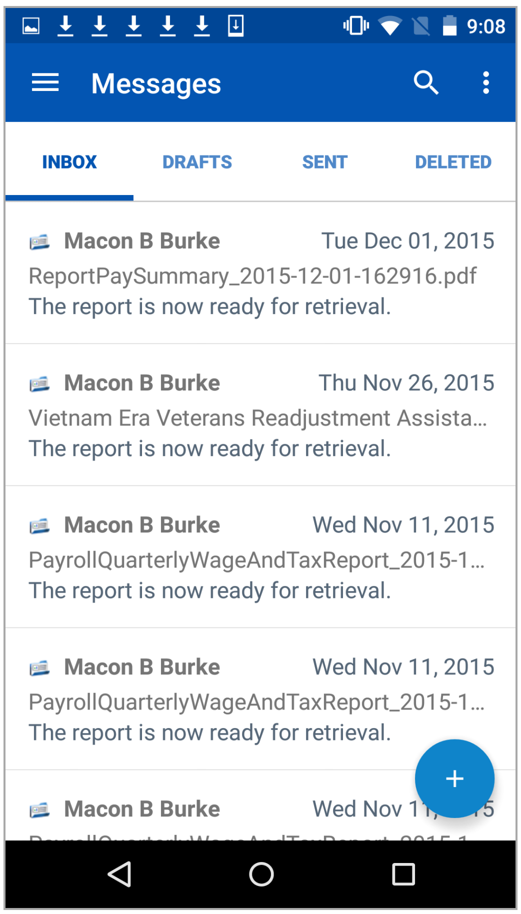
If you only have the **Schedules** feature enabled, when you tap a push notification, the app opens the **Schedules** feature. Within the **Schedules** feature, the week calendar has a blue background highlight for days where a shift change has occurred. In addition, shifts under **My Shifts** section has a blue background highlight for shifts that have changed.

Notes:

- If you enter either the **Calendar** or **Schedules** feature from a push notification, the blue background highlight will remain until you exit the feature and return.
- If shift changes exist in a week that spans two months (either in the future or past), tapping on the notification will direct you to the day of the shift change that is closest to the current day.
- If you have multiple shifts within a day but one has changed and another has not, the calendar day will have a blue background highlight and the shift information below the calendar will be highlighted on the shifts that have changed.

Messages

Through the **Messages** feature, you can read messages that have been sent to you by other users, or system alerts that have been sent to you by the application.



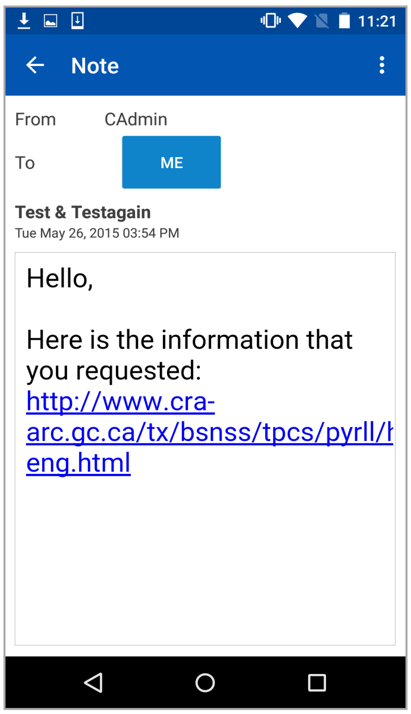
You can access the **Inbox**, **Drafts**, **Sent**, and **Deleted** folders by tapping the folder name at the top of the screen. To find a specific message, in the appropriate folder, type your search criteria into the **Search** field at the top of the screen. Otherwise tap a message to view it.

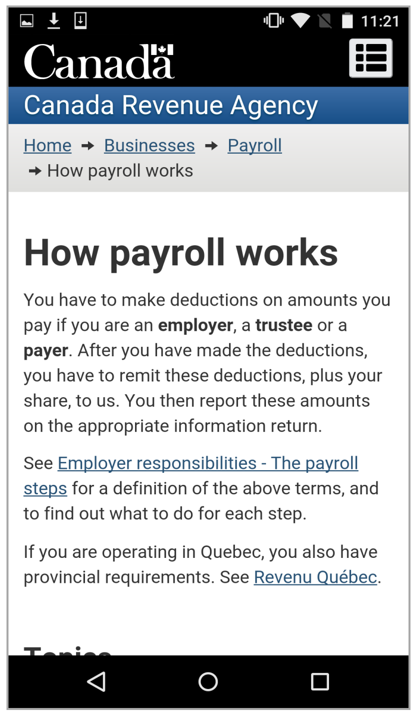
Configuration

Configure role feature access for **Messages** in the main application in **System Admin > Roles > Features > Mobile > Messages**.

URL Links

When you tap a URL link that is contained in a message, the link opens in a browser outside of the app. Tap the button on your mobile device to go back to the previous screen.





Download Reports

Tap the link within the message to download the report.

Delete Messages

Messages can be deleted individually or in bulk.

Delete one message:

1. Hold and press the message. The **Selected** dialog box displays how many messages are selected.

2. Tap the delete icon .
3. Confirm the deletion in the confirmation dialog box.

Delete bulk messages:

1. Hold and press the message. The **Selected** dialog box displays how many messages are selected.
2. Select additional messages.
3. Tap the delete icon .
4. Confirm the deletion in the confirmation dialog box.

Note: Deleted messages are in the **Deleted** tab.

Compose a Message

To compose a new message, tap the compose icon .

Depending on how the application is configured, you have the option of creating a **New Note** or a **New Broadcast**. The recipients of a Note can reply to your message, while the recipients of a Broadcast cannot.

Note: Access to notes and broadcasts is configured through the main application. If you do not see one or both of these options and believe that you should, contact your manager or system administrator.

Messages can be sent to individual users, multiple users, or to a filtered list of employees. Type the subject line in the field at the top of the screen, and type the body of the message in the text box below.

To delete your current message, open the context menu and tap **Discard**. Save the message so that it can be sent later by touching **Save Draft**.

When your message is complete, open the context menu and tap **Send**.

Search for Recipients

To select the recipients to send a message to, tap the icon.

The **Available** tab under the search bar is automatically selected and all available recipients for your locations are displayed. For example, if you manage more than one location, all employees from those locations are incorporated into the list. In addition, if you already selected a location while using another feature of the application, the **Employees** feature will still provide access to employees from all locations.

To search the recipients to send a message to, type all or part of the name of the recipients in the search bar.

As you type, the application instantly filters the list of available recipients.

For example, if you type the letter 'm', the list only displays employees who have an 'm' in any part of their name. If you clear the search bar, the application once again displays all available recipients.

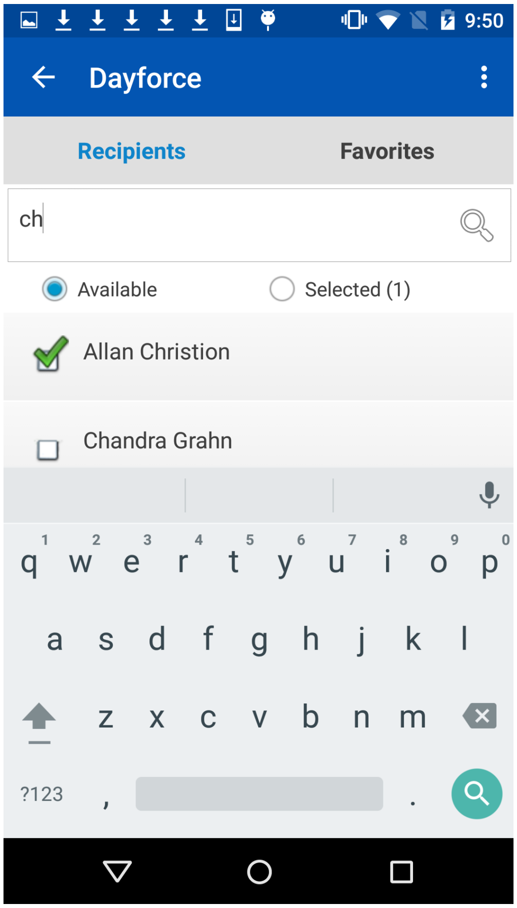
Tap the names of the recipients to include in the message and the icon next to their name turns into a checkmark. Also, the **Selected** button under the search bar displays the total number of recipients you have selected.

Select a Filter

To select a filtered list to send a message to, touch the  icon and then touch **Favorites**. The app displays any filters you have configured and saved as favorites in the main application. Touch the filter to include the users returned by the filter as message recipients.

If you do not see any entries in the Favorites list, log in to the main application and create a filter in **Message Center**.

When you are finished selecting recipients, open the context menu and tap **Done**.



You can touch the **Selected** button at any time to view a filtered list of recipients you have selected so far.

You can include as many recipients as required; you can search for names and select from the results multiple times to build a recipient list.

When you are finished selecting recipients, open the context menu and tap **Done**.

My Goals

My Goals allows you to view both the goals that you created, and the goals that your manager assigned to you in the **Performance** module in the main application. In addition, **My Goals** lets you make changes to your existing goals by adding comments to conversations, and modifying your goal progress.

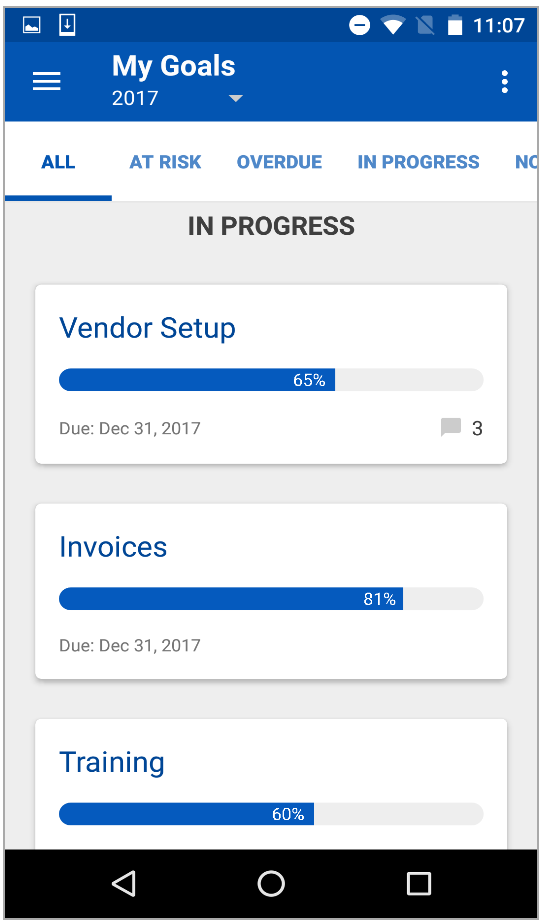
Setup

Configure the **My Goals** feature by enabling the following in the main application:

- Access to the feature: **System Admin** > **Roles** > **Features** > **Mobile** > **Performance** > **Goals** > **My Goals**
- Conversation on the goal cards: **System Admin** > **Roles** > **Features** >**Mobile** > **Performance** > **Conversations** > **Goals** > **My Goals**
- The conversations section in the goal detail screen and an icon on the goal card in the list screen: **System Admin** > **Roles** > **Features** >**Mobile** > **Performance** > **Conversations**

Main Screen

When you open the **My Goals** feature, the app displays each goal on a goal card. Each goal card contains the due date for the goal, and comments where applicable. The app lists all your goals for the current year in the **All** tab:



By default, all goals are sorted by their due date, and grouped based on their status. The app sorts the status in the order listed in the following chart:

At Risk	The goal progress is 10% or more behind the expected progress.	

Overdue	The goal has passed the due date and is not completed.	
In Progress	The goal is on track to be completed by the due date.	
Not Started	The goal is 0% completed.	
Completed	The goal is 100% completed.	

You can view your goals in the various status tabs rather than from the **All** tab. Tap or swipe through the tabs to view a goal for a specific status:

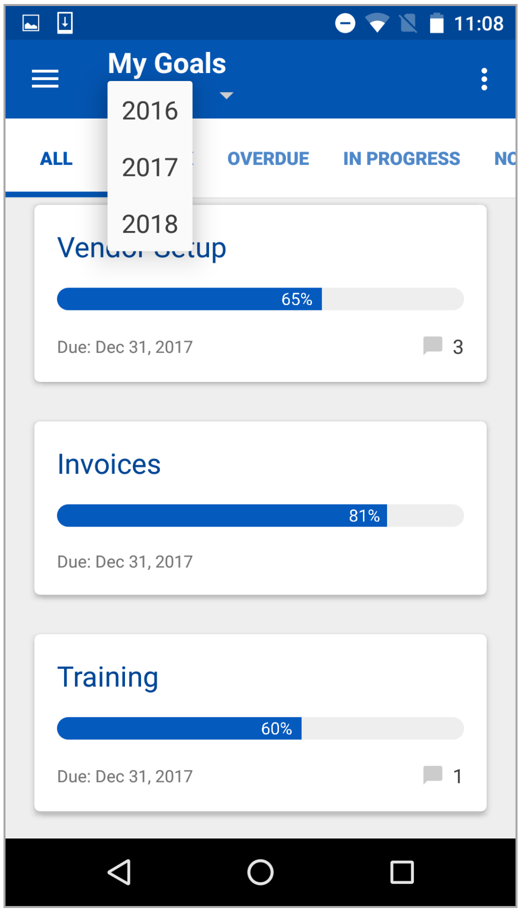
ALL **AT RISK** **OVERDUE** **IN PROGRESS** **NC**

The following points apply to goals in the list view:

- If a goal does not have a due date, it is listed at the end of the applicable status group and is sorted by the creation date.
- If there are no goals for a status group, the app does not display the status name.
- If there are no goals to display, the app displays the message: "you have no created or assigned goals to display".

Year Selection

By default, the app displays goals that are in the current year. If a goal spans multiple years, it is displayed in the year that the goal starts. Use the drop-down list at the top of the screen to view goals from the current year, one year in the past, or one year in the future:



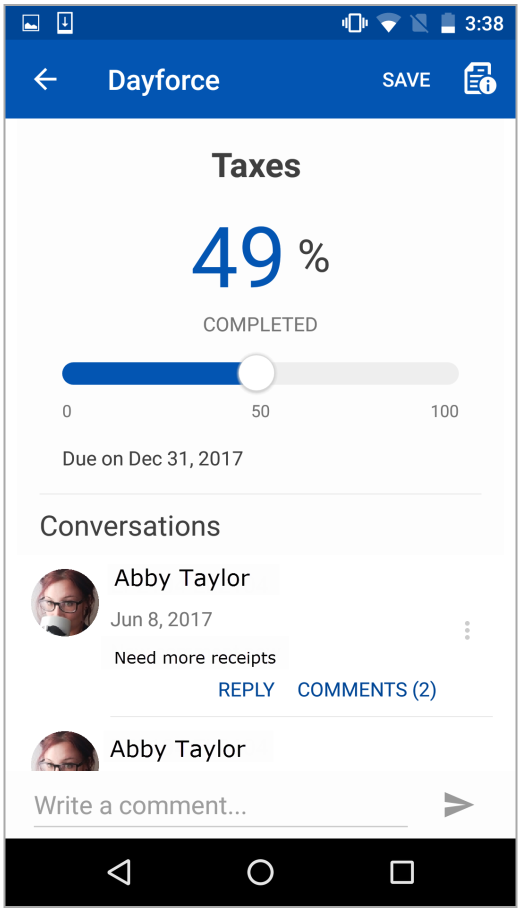
Goal Details

When you select a goal on the home screen, the app displays your goal details. From the goal details screen, you can do the following:

- Add new comments to conversations or reply to an existing comment.
- Delete the comments that you posted.
- Update your status by dragging the progress bar, or by selecting the percentage complete value and manually entering a new value.

Once you are finished making your updates, tap **SAVE**.

Note: When you save a conversation message for a goal, the app sends a message to the recipient notifying them about the conversation message. The message is displayed in the **Messages** feature.



Deactivated Goals

When goals are no longer needed, you can deactivate them in the main application to ensure that new goals are not aligned to them. This is useful for organizations with annual, quarterly, or semi-annual goals that are not always needed. When goals are deactivated, they are displayed in the main application in an inactive state with grayed-out font. Deactivated goals are also displayed in the mobile app. The following points apply to deactivated goals:

- Deactivated goals remain in the same status they were before they were deactivated.
- You cannot modify the progress of deactivated goals.
- You can add comments to deactivated goals.
- If deactivated goals are reactivated in the main application, you can make modifications to those goals in the mobile app by adding comments to conversations, and modifying the goal progress.

View Your Profile

You can view and edit your employee information such as your address, phone numbers, and emergency contact information in the **My Profile** feature.

Note: Access to viewing certain contact information is configured through the application. If you do not see certain information and believe that you should, contact your manager or system administrator.

Depending on how the application has been configured, you might also be able to change your password.

Add and Edit Phone Number Data

You are able to add, edit, and delete phone number data. The following fields are available:

- **Phone Numbers**:
  - **Type** (mandatory)
    - Home (default)
    - Mobile
    - Business fax
    - Business mobile
    - Business
    - Personal fax
    - Pager
    - TTYTDD
  - **Country Codes** (mandatory)
  - **Phone Number** (mandatory)
  - **Extension** (optional)
  - **Alerts** (optional)
  - **Unlisted** (optional)

Notes

- There is no limit to the number of phone numbers that can be added.
- Mandatory fields are marked with an asterisk(*).

Configuration

Employees - To add and edit contacts using the **My Profile** feature:

- Configure role access in **System Admin** > **Roles** > **Features** > **Mobile** > **My Profile** > **Direct Edit Contact Information** in the main application.
- Set authorizations to read, create, edit, or delete Profile data in **System Admin** > **Roles** > **Authorizations** > **Employee Contact Information** in the main application.

Add a Phone Number

1. Tap the edit icon.
2. In the **Phone Numbers** section, tap **Add Phone Number**.

3. Select the **Phone Number Type**.
4. Tap to select the country code.
5. Tap the phone number field to type in a phone number and extension if applicable.
6. In the **Alerts** field slide the button to the right if you want to receive alerts.
7. In the **Unlisted** field slide the button to the right if you want the number to be unlisted.
8. Tap **Save**.

Add and Edit Email Address and Online Profile Data

You are able to add, edit, and delete **Email Address** and **Online Profile** data. The following fields are available:

- **Email Address**
  - **Type** (mandatory)
    - Business
    - Personal
  - **Email address**
  - **Alerts**
- **Online Profile**:
  - **Type** (mandatory)
    - Twitter
    - Facebook
    - Business Twitter
    - LinkedIn
  - **Profile Address** (mandatory)

Notes

- There is no limit to the number of email addresses and online profile that can be added.
- Mandatory fields are marked with an asterisk(*).

Configuration

Employees **-** To add and edit contacts using the **My Profile** feature:

- Configure role access in **System Admin** > **Roles** > **Features** > **Mobile** > **My Profile** > **Direct Edit Contact Information** in the main application.
- Set authorizations to read, create, edit, or delete profile data in **System Admin** > **Roles** > **Authorizations** > **Employee Contact Information** in the main application.

Add an Email Address

1. Tap the edit icon.
2. In the **Email Address** section, tap **Add Email Address**.

Note: If you want to edit an existing email address skip step 2.

3. Tap to add the **Email Address Type**.
4. In the **Email Address Types** screen, tap to choose a type.
5. In the **Email Address** field, type in your email address.
6. In the **Alerts** section, slide the button to the right to subscribe to alerts.
7. Tap **Save**.

Add an Online Profile

1. Tap the edit icon.
2. In the **Online Profile** section, tap **Add Online Profile**.

Note: If you want to edit an existing email address skip step 2.

3. Tap to add a profile type.
4. In the **Online Profile Types** screen, tap to choose a type.
5. In the **Profile Address** field, type in your profile address.
6. Tap **Save**.

Add and Edit Emergency Contacts

You are able to add, edit, and delete your emergency contacts. The following fields are available for emergency contacts:

- **First Name** (mandatory)
- **Last Name** (mandatory)
- **Relationship** (mandatory)
- **Email** (optional)
- **Business Phone** (optional)
- **Home Phone** (optional)
- **Mobile Phone** (optional)

Notes

- There is a limit of 2 emergency contacts. If 2 emergency contacts already exist the option to add or import an emergency contact is not displayed until you delete a contact.
- At least one phone number type is required (business, home, or mobile).
- Character length limit for **First Name** and **Last Name** fields is 64.
- Character length limit for **Email Address** is 250.
- String length limit for phone numbers is 30 (excluding brackets, spaces, dots and dashes).
- String length limit for international phone numbers is 15 (excluding brackets, spaces, dots and dashes).

Configuration

Employees - To add and edit emergency contacts using the **My Profile** feature:

- Configure role access in **System Admin** > **Roles** > **Features** > **My Profile** in the main application.
- Set authorizations to read, create, edit, or delete emergency contacts in **System Admin** > **Roles** > **Authorizations** > **Employee Emergency Contacts** in the main application.

Add Emergency Contacts Manually

1. Tap the edit icon.
2. In the **Emergency Contacts** section tap **Add Emergency Contact**.
3. In the **Add Emergency Contact** option list select **Add Contact Manually**.
4. In the **First Name** field type in the first name.
5. In the **Last Name** field type in the last name.
6. In the **Relationship** field choose an option from the pop-up screen.
7. In the **Email Address** field optionally type in an email address.
8. Type in a phone number for at least one of the phone number types: **Mobile**, **Home**, or **Business**.
9. Tap **Save**.

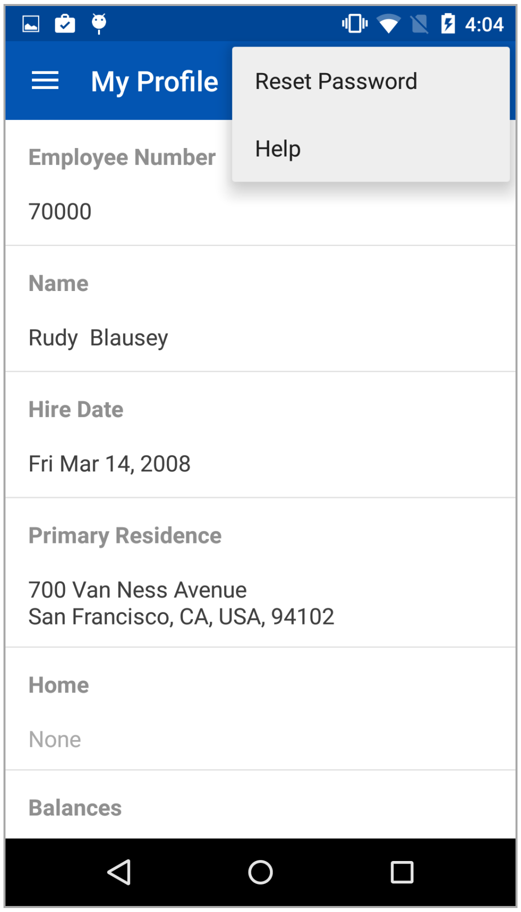
Import Emergency Contacts from your Mobile Device's Contacts

1. Tap the edit icon.
2. In the **Emergency Contacts** section tap **Add Emergency Contact**.
3. In the **Add Emergency Contact** option list select **Import From Contacts**.
4. In the **All Contacts** screen select a contact.
5. In the confirmation screen confirm the contact information.
6. Optionally, edit the fields that have missing information.
7. Tap **Save**.

Note: The app displays a pop-up warning message if mandatory fields are not filled out.

Change Your Password

If the **Reset Password** option is displayed in the context menu, you can change your password.



In the fields provided, type your original password, and then type your new password twice.

When you tap the **Save** button, the application verifies that the password you entered meets your organization's password requirements. If the password you entered does not meet the requirements, the application prompts you to enter a different password.

Set up your Security Questions

You can set up your own security questions that you need to answer if you forget your login password.

Configuration

To enable the security question set up by users, configure the following in the main application:

System Admin > **Roles** > **Features** > **Mobile** > **My Profile** > **Security Questions**

Set up your Security Questions

Set up your security questions by doing the following:

1. Navigate to **My Profile** > **Update Security Questions**.
2. Enter your password.
3. Answer security questions number #1 and #2.

   Note: You can change your current security questions by tapping the question to open question option list. There is a checkmark beside the chosen question.

4. Tap **Save**.

Delegation

Authorized managers can delegate access to user accounts. Delegation might become necessary when an employee requests an extended leave of absence, thus it might be necessary to delegate access to their user account. For example, a user with access to an employee's account can log in and authorize timesheet entries to ensure that the employee will be paid for their time worked before their absence. A user account can be delegated to an HR professional, manager, or an authorized employee.

Before You Begin: The delegate needs to have access to the user account.

Additional Information

The following points apply to a delegation:

- Managers can cancel a delegation.
- Managers can edit an existing delegation and change any of the values.
- It is possible to have more than one delegate active for the same period. For example, delegate #1 has access to pay information, delegate #2 has access to documents.
- A user can be a delegate for multiple employees at the same time.

Setup a Delegate

Take the following steps to setup a delegate:

1. In the **My Profile** screen, tap the **Delegation Access** button.
2. In the **Delegation Access** screen, tap the new button.
3. Tap the **Employee** field to select an employee that you want to give delegation access to.
4. Tap the **Reason** field to specify a reason from the list of reasons.
5. Specify the dates for the **Effective From** and **Effective To** fields.
6. Move the switch on or off to **Restrict Pay Information**.
7. Move the switch on or off to **Restrict PII documents**.
8. Tap **Save**.

Take the following steps to edit a delegate:

1. In the **My Profile** screen, tap the Delegation Access button.
2. In the **Delegation Access** screen, tap the delegate that you want to edit.

3. In the **Edit Delegate** screen make your edits.
4. Tap **Save**.

Take the following steps to delete a delegate:

1. In the **My Profile** screen, tap the **Delegation Access** button.
2. In the **Delegation Access** screen, tap the delete icon beside the delegate that you want to delete.
3. In the confirmation dialog box, tap **OK** to confirm.

Configure Maximum Delegation

There is a client property where you specify a number for the maximum delegation duration. Therefore, when you specify a date range in the **Add Delegate** screen in the mobile app, the app does not allow you to select a date range for the **Effective Period** date picker that goes beyond the maximum duration that was set in the client properties.

Configuration

Set the maximum delegation duration in the following location in the main application:

System Admin > Client Properties > General Properties > Delegation Duration Maximum (in Days).

Enter a whole number in the text field.

Configure Delegation Exclusion

When you tap the employee field to make your delegation selection, the app displays only the employees that were not excluded from delegation. There is a role property where you specify the roles that you want to exclude from delegation.

Configuration

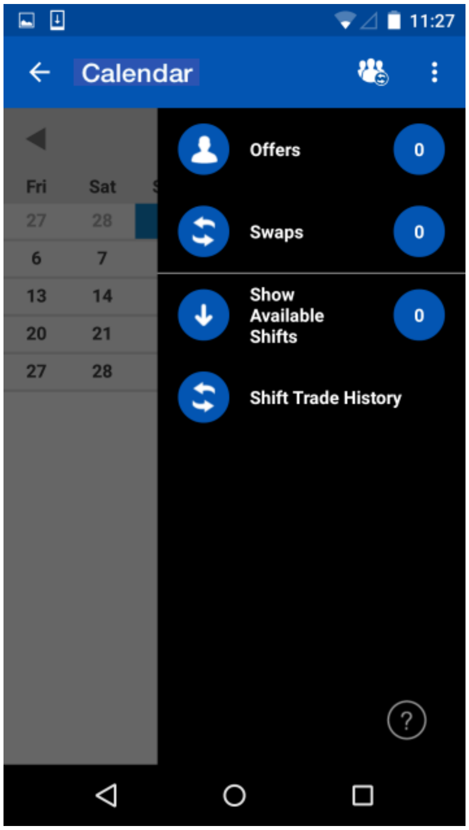
Specify the roles that you want to exclude from delegation in the following location in the main application:

System Admin > Roles > Properties > Exclude Employees with this Role from Delegation.

Trade Shifts

If your organization has enabled shift trading, you can trade shifts with your colleagues directly in the **Schedules** and **Calendar** features in the mobile app. When shift trading is enabled, the app displays an additional Shift Trading menu icon at the top of the screen in the Calendar feature:

When you tap this icon, the app displays your shift trading options:



Note: Depending on how your organization has configured shift trading, you might not have access to all of the options described in this section. For more information on your organization's configuration, contact your manager or Dayforce Administrator.

Shift Trading Icons

When shift trading is enabled in **Schedules**, the app displays the following icons:

Displayed in the calendar on days with posted shifts that you can pick up.

Note: This indicator is not displayed by default in the **Calendar** feature. To display shifts that you can pick up, open the menu and tap **Show Available Shifts**.

Displayed in the calendar on days where you have a pending outgoing trade.

Displayed in the calendar on days where you have a pending incoming trade.

Displayed in the details section beneath the calendar on days where you have a shift that you can trade.

Displayed on the **Calendar** feature name in the navigation menu and on the Home page of the **Calendar** feature when you have an incoming shift trade. The number represents a count of offers and swaps.

Post a Shift

Posting a shift makes it available to all employees who are qualified to work it. This means that any of your colleagues you can work the same job as you are able to pick it up once you've posted int.

To post a shift:

1. In the calendar, tap the day with the shift you'd like to trade.
2. Tap the shift beneath the calendar to open the schedule details.
3. Tap the **Offer** button to open the **Select an Associate** screen.
4. Select **Any**.
5. If necessary, use the **Partial Shift** control to post only part of the shift (for example, the 9-1 portion of a 9-5 shift).
6. Tap **Confirm**.

Once you've posted the shift, it is displayed in your schedule as a pending trade. If someone accepts the shift and the trade is approved, it will no longer be displayed in your schedule.

Offer a Shift

As opposed to posting a shift, which makes it available to everyone, you can instead offer it directly to a specific (qualified) colleague.

To offer a shift:

1. In the calendar, tap the day with the shift you'd like to trade.
2. Tap the shift beneath the calendar to open the schedule details.
3. Tap the **Offer** button to open the **Select an Associate** screen.
4. Select an associate from the list that you want to offer the shift to.
5. If necessary, user the **Partial Shift** control to post only part of the shift (for example, the 9-1 portion of a 9-5 shift).
6. Tap **Confirm**.

Once you've offered the shift, it is displayed in your schedule as a pending trade. If your colleague accepts the shift and the trade is approved, it will no longer be displayed in your schedule.

Swap a Shift

Swapping shifts allows you to offer up one of your shifts in exchange for one of your colleague's shifts.

To swap a shift:

1. In the calendar, tap the day with the shift you'd like to trade.
2. Tap the shift beneath the calendar to open the schedule details.
3. Tap the **Swap** button to open the **Specify Shift** screen.
4. Tap **Select an Associate** to select a specific associate or **Any** associate, and specify the **Start Date** and **End Date** for the shift that you want to swap.
5. Tap **Search**.
6. In the **Specify Shift** screen, select the shift you would want to swap from the listed results.
7. Review the details of the shift you're offering and the one you're requesting to verify that you have selected the correct shifts.
8. Tap **Swap Shift**.

Once you've proposed the swap, it is displayed in your schedule as a pending trade. If your colleague accepts the swap and it is approved, the shift you picked up is displayed in your schedule, and the shift you gave up is not.

Revoke a Trade

To cancel a pending shift trade:

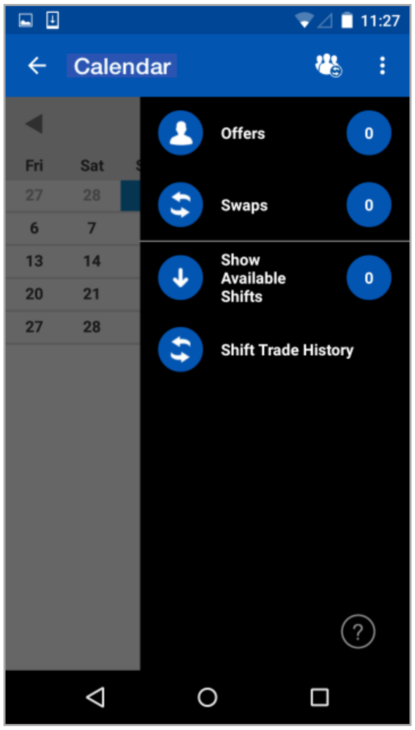
1. Tap the shift details beneath the calendar.
2. On the **Schedule Details** screen, tap the **Revoke** button.

Depending on how your organization has configured the application, you might also be able to cancel approved trades. If this functionality is enabled:

1. Open the menu and tap **Shift Trade History**.
2. Tap the shift.
3. Tap **Revoke**.

Pick Up Shifts

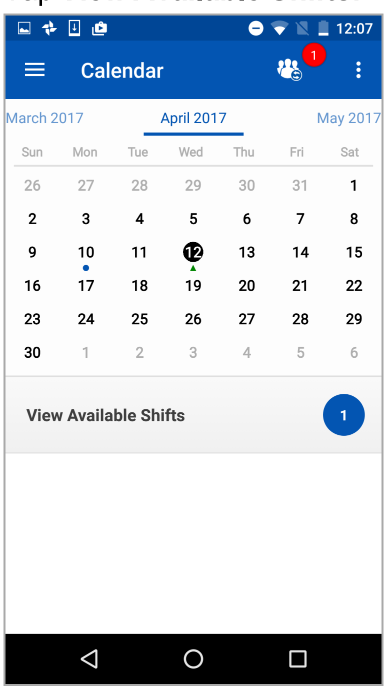
To view shifts that colleagues have posted, open the menu and tap **Show Available Shifts**. The app displays a count of the available (i.e., posted) shifts next to this menu item:



Available shifts are marked in your calendar with a green triangle.

To pick one up:

1. Tap the day in the calendar.
2. Tap **View Available Shifts:**

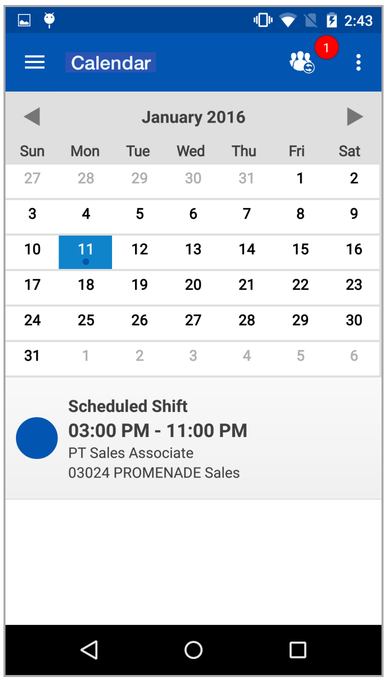


3. Review the details of the posted shift.
4. To accept the posted shift, tap **Pick Up Shift**. Otherwise, tap the back button.

Once the trade is approved, this shift is displayed as a scheduled shift in your calendar.

Review Offers and Swaps

When one of your colleagues offers you a shift or proposes a swap, the app displays a red indicator in the **Calendar**:



To respond to the offer or swap:

1. Tap the shift trading button to open the shift trading menu.
2. In the menu, tap either **Offers** or **Swaps** (depending on which type of trade you've received). The app displays a count of offers and swaps next to the corresponding menu item.
3. Review the details.
4. Tap either **Accept** or **Decline**.

View Shift Trade History

You can view the details of your trades by opening the menu and tapping **Shift Trade History**. To load more trades, tap either the **Load More Past Trades** or **Load More Future Trades** button.

Do the following to view your general shift trade history:

1. On the **Schedules** feature home page select the context menu on the upper right.
2. Select **Shift Trade History**.
3. Optionally, tap the **Load More Past Trades** button.

Do the following to filter your general shift trade history:

1. On the **Schedules** feature home page select the context menu on the upper right.
2. Select **Shift Trade History**.
3. Select the filter icon to open the filter screen.
4. Select the statuses that you want to filter by.
5. Tap **Apply**.

Do the following to view the shift trade history for a specific trade:

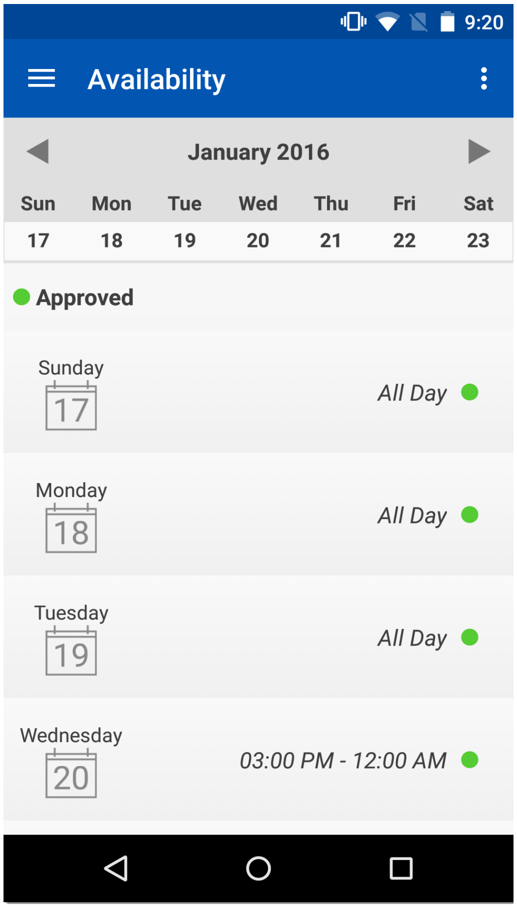
1. On the **Schedules** feature home page select the shift you want to view.
2. In the **Schedule Details** screen tap **View History**.

Do the following to view the shift trade history for a specific trade:

1. On the **Schedules** feature home page select the shift you want to view.
2. In the **Shift Details** screen tap the shift to view the shift trade history.
3. Select the filter icon to open the filter screen.
4. Select the statuses that you want to filter by.
5. Tap **Apply**.

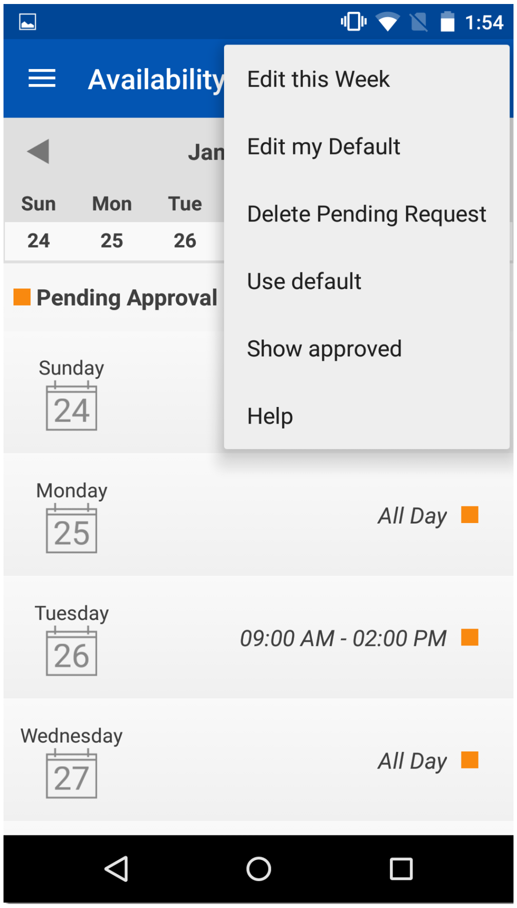
Review Your Weekly Availability

Through the **Availability** feature, you can review your weekly and default availability on the calendar. The application displays your availability for each day, listed by week:

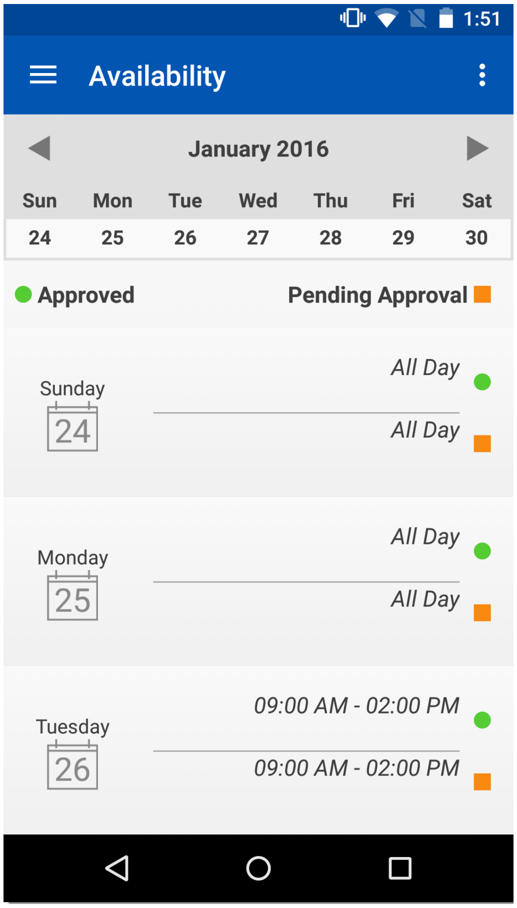


You can navigate between weeks either by using the arrows or swiping across the screen.

On weeks that you have a pending change to your availability, the application displays your pending availability by default, marked with an orange square. If necessary, you can also view your approved availability (marked with a green circle) by opening the menu and tapping **Show Approved**:



The application then displays both your pending and approved availability for the selected week:

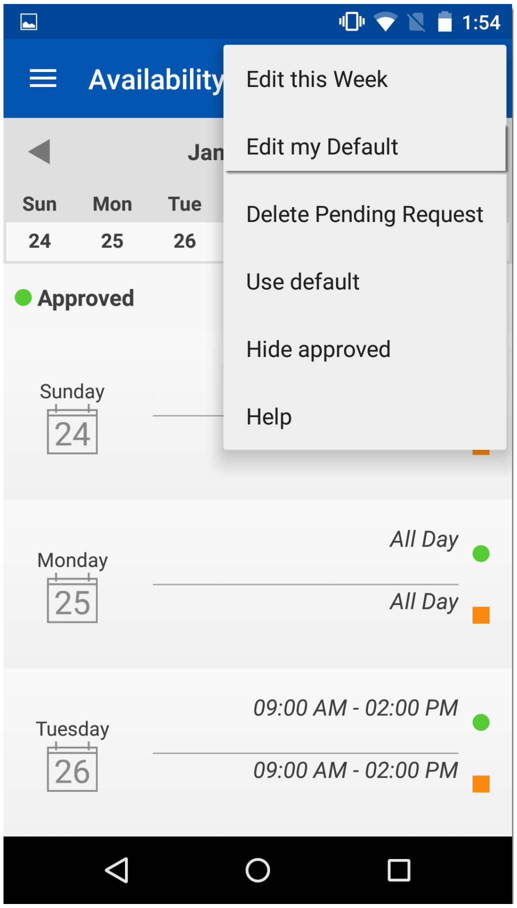


Edit Your Default Availability

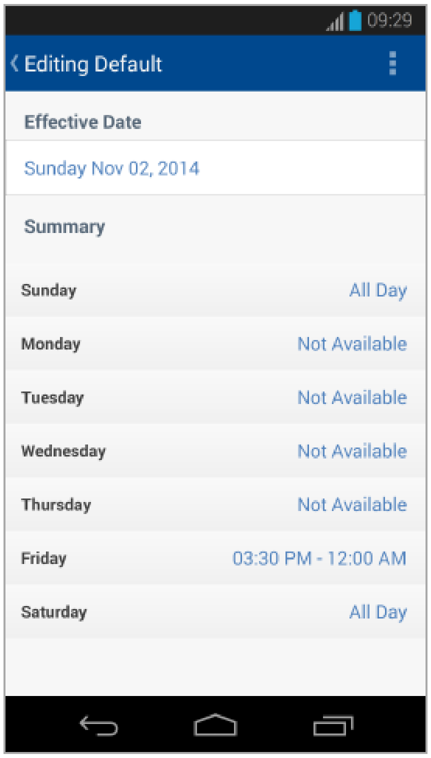
Your default availability allows you to define when you are typically available to work, without having to make the same manual edits every week.

To edit your default availability:

1. Open the menu and tap **Edit my Default**:

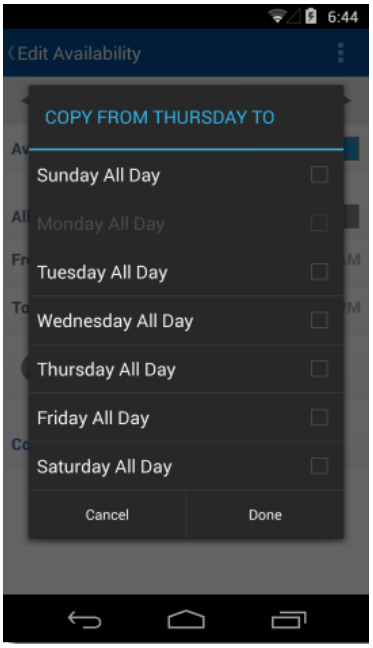


2. If necessary, edit the date that your availability takes effect. By default, the application populates this field with the week you were viewing when you opened the edit control:



3. Tap the day you want to edit.
4. Select your availability for each day from the editor options:
   - To mark yourself as not available or not, tap the **Available** slider.
   - To toggle between all day and partial day availability, tap the **All Day** slider.
   - To specify your availability range(s) on days that you are available for part of the day, use the **From** and **To** controls. To add more than one range of availability (for example, if you're available from 9-12 and then again from 3-7), tap the **Add another availability range** button.
   - To copy your availability to another day, tap the **Copy** button. The app displays a control where you can select the day(s) you want to copy your availability to by tapping

them in the list:



When you have finished updating your availability for the day touch **Done**.

Apply your Default Availability

Once you have defined your default availability, you can apply it to necessary weeks:

1. Navigate to the necessary week.
2. Open the menu and tap **Use Default**.

Edit your Weekly Availability

Your availability settings within the application define when you can work. You can specify on which days of the week and between what times on each day you are available.

To edit your availability:

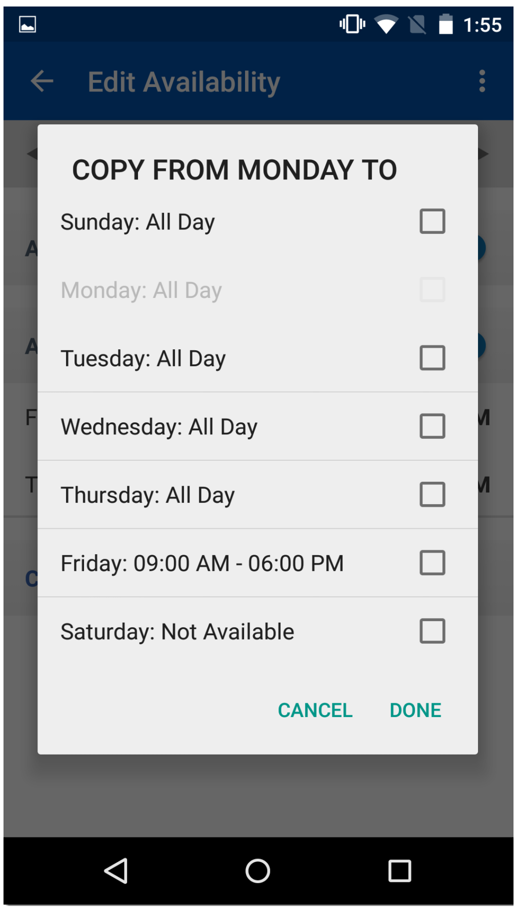
1. Navigate to the necessary week.

   Note: Weeks that cannot be edited are grayed out. Typically, this means that you are currently within a "blackout" period for editing that week (i.e., the week is not far enough in the future to edit).

2. Open the menu and tap **Edit This Week**.
3. To copy the previous week's availability to the selected week, tap the **Copy from last week** button.

   Note: When you have both pending and approved availability for the previous week, the application copies your pending availability.

4. To edit your availability for a day in the week, tap the day in the list. Use the editor options listed below to specify your availability for that day:
   - To mark yourself as not available or not, tap the **Available** slider.
   - To toggle between all day and partial day availability, tap the **All Day** slider.
   - To specify your availability range(s) on days that you are available for part of the day, use the **From** and **To** controls. To add more than one range of availability (for example, if you're available from 9-12 and then again from 3-7), tap the **Add another availability range** button.
   - To copy your availability to another day, tap the **Copy** button. The app displays a control where you can select the day(s) you want to copy your availability to by tapping them in the list:



   When you have finished updating your availability for the day, touch **Done**.
5. If necessary, type a comment for the availability change in the **Comments** field.
6. When you have finished updating your availability for the week, open the menu and touch **Save**.

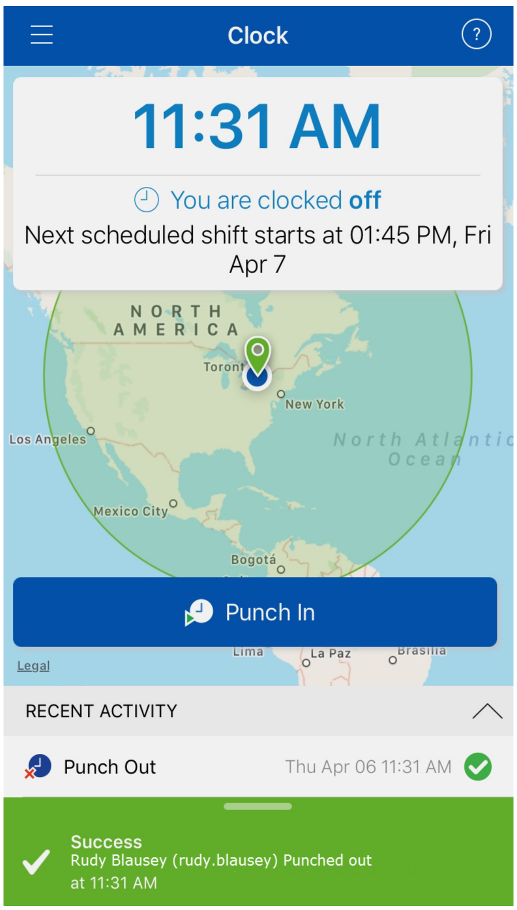
Cancel a Pending Availability Change

If necessary, you can cancel a pending availability change (i.e., one that you have requested, but that has not yet been approved by your manager) by navigating to the necessary week, and then selecting **Delete Pending Request** from the menu.

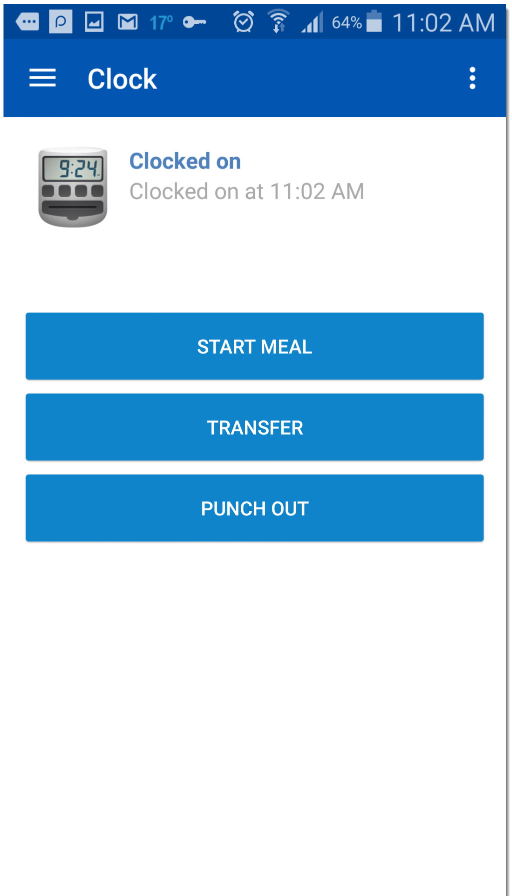
Clock In and Out

Through the **Clock** feature, you can punch in and out for your shifts and meals using your mobile device, while you are at work.

The application only displays the buttons that are valid based on your current punches. For example, when you are clocked off, the application only displays the **Punch In** button:



After you punch in, the application displays additional buttons for you to select to start your meal or break, record a transfer, or punch out. To record a punch, touch the appropriate button:



Store Coordinates

You can store the specific coordinates of employees who punch in for work. This way managers can capture employee punch coordinates (latitude/ longitude), and use that information for reporting purposes.

Before You Begin: The employee should have their punch policy configured correctly to allow clock punch coordinates to be stored. In addition, the employee must accept the prompt on their mobile device to allow the usage of location services.

- If an employee attempts to punch in but is not within the predefined accuracy threshold (100 meters), the **Punch** button appears disabled but when tapped, the app displays the message: "Waiting for more accurate location...".
- Once a location is determined to be within the accuracy threshold (100 meters), the app enables the punch button.

- If an employee's punch policy changes so that the employee's punches will now send location information, and they log in to the **Clock** feature (non-map enabled), the app displays the prompt for location services.
- If an employee does not have a sufficient internet connection to allow for a punch accuracy of sub 100 meters then the app displays a message informing them that a sufficient internet connection is pending.

Geo-location

You can enable Geo-location on the punch policy so that when an employee punches in using a mobile device, the punch coordinates are recorded and stored in the database.

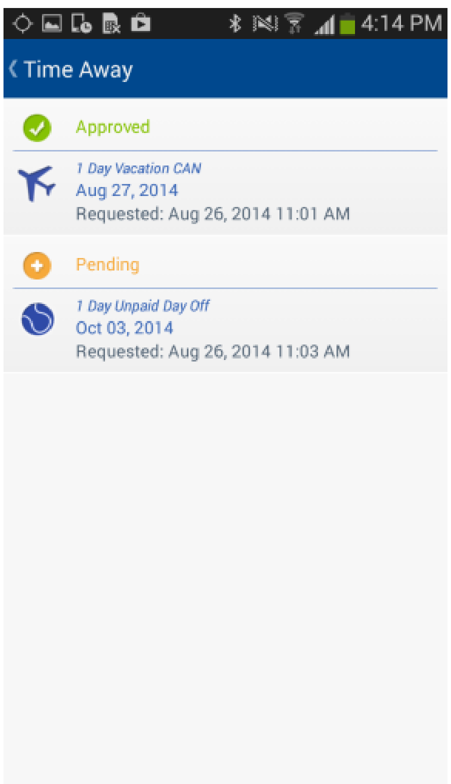
Configuration

Enable Geo-location on the punch policy in the following location in the main application:

Pay Setup > Punch Policy > Main (tab) **> Main** (section).

Request Time Away from Work

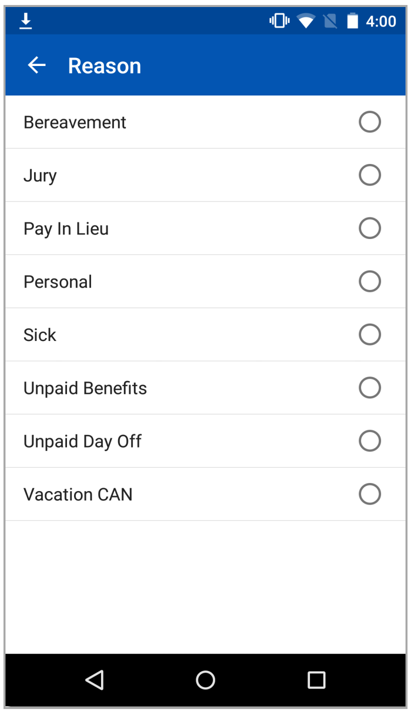
Through the **Time Away** feature, you can view and request time away from work for part of a day, a single day or a range of dates.



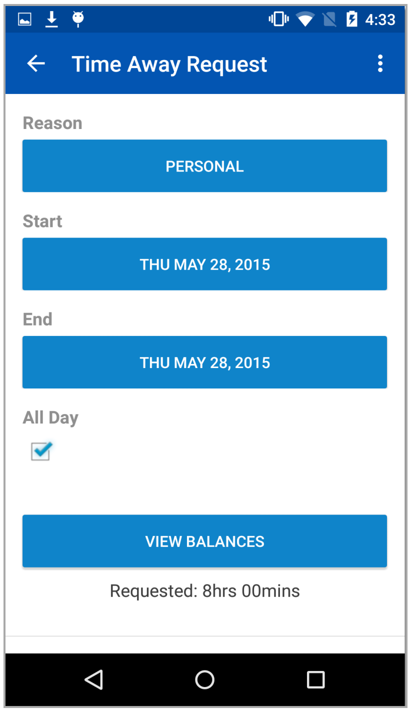
When you make a time away from work request, you specify a reason, such as vacation time or sick leave. The reason you select determines how you are paid for the time. It can also determine whether you are allowed to request the time away from work, or not, as the application tracks how much time you've taken away from work for each reason. It then compares this amount against how much time you are allowed.

To make requests, in the **Time Away** feature:

1. Open the context menu and tap the **New Request** option. The application displays the **Reason** screen.



2. Tap the reason for the time off from the list. The application displays the **Time Away Request** screen:



3. To request full days off, select the **All Day** checkbox; to request a specific amount of time by hours, or to enter an elapsed time clear the checkbox.
4. Tap the **Start** and **End** buttons and select the day, and if applicable the time, that the request begins and ends.
5. Tap **View Balances** if you want to view the time away remaining balances and the history details (**Accrued**, **Approved**, **Pending**, **Remaining**, **Exceeded**).
6. If necessary, tap the **Employee Comment** text field and type your comments.
7. Open the context menu and tap the **Save** option.

Review Your Time Away From Work Requests

When you request time away from work, your request is sent automatically to your manager for review and approval. The status of any request you made is displayed when you load **Time Away**.

The application displays a list of your time away from work requests, each of which is labeled with one of the following statuses:

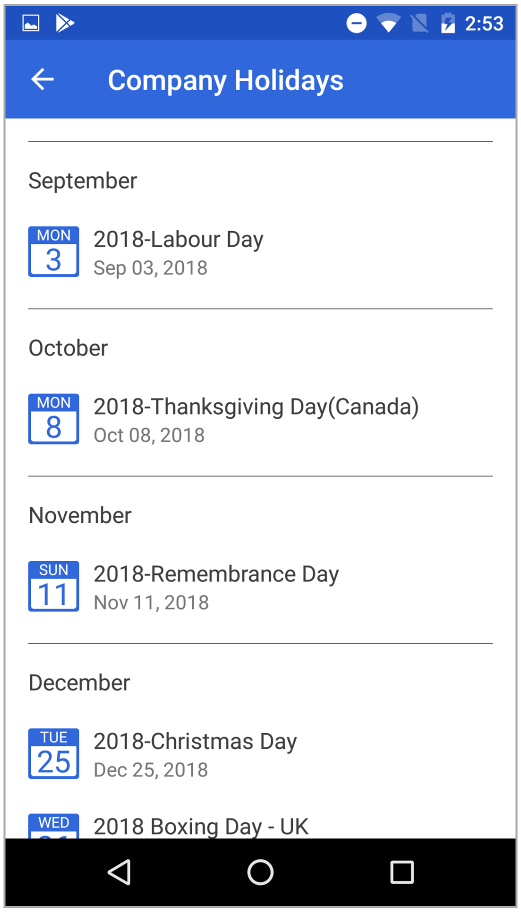
- Pending ( )
- Approved ( )
- Denied ( )
- Cancellation pending ( )
- Canceled ( )

To display or hide comments in the list, open the context menu and tap the **Show/Hide Comments** button.

View Company Holidays

The app displays a list of company holidays from present day to one year in the future in the **Time Away** feature. Do the following to view your company's upcoming holidays:

1. On the **Time Away** home page open the context menu.
2. From the context menu select **Company Holidays**.



Review and Sync Your Calendar

This section describes the actions that you can perform in the **Calendar** feature, including:

- **Reviewing Your Schedule** on page 143
- **Syncing to Your Local Calendar or Google Calendar** on page 147

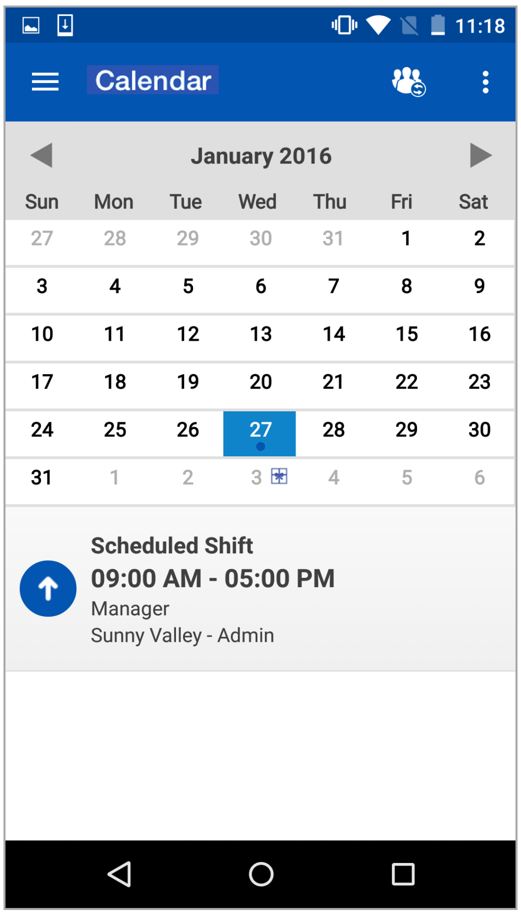
Note: Depending on how your organization has configured the app, you might also be able to Trade Shifts. To learn more, see **Trade Shifts** on page 123.

Reviewing Your Schedule

This section describes how to read the information displayed in **Calendar** feature.

Note: Your managers set your schedule within the application based on your availability, the job(s) you perform, and their staffing needs. In the **Calendar** feature, you can see when you work as soon as the schedule is published.

When you open the **Calendar** feature, the application displays the current month and highlights the current day:

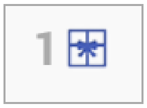


You can tap the arrows at the top of the screen to select a different month.

Your scheduled shifts are marked with a blue circle:

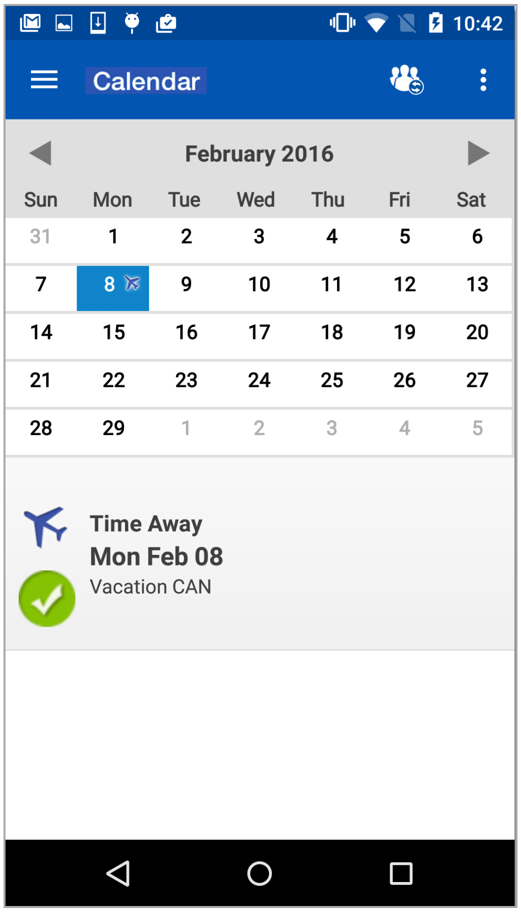
Your approved time away from work requests are marked with an icon that depends on the time away from work type.

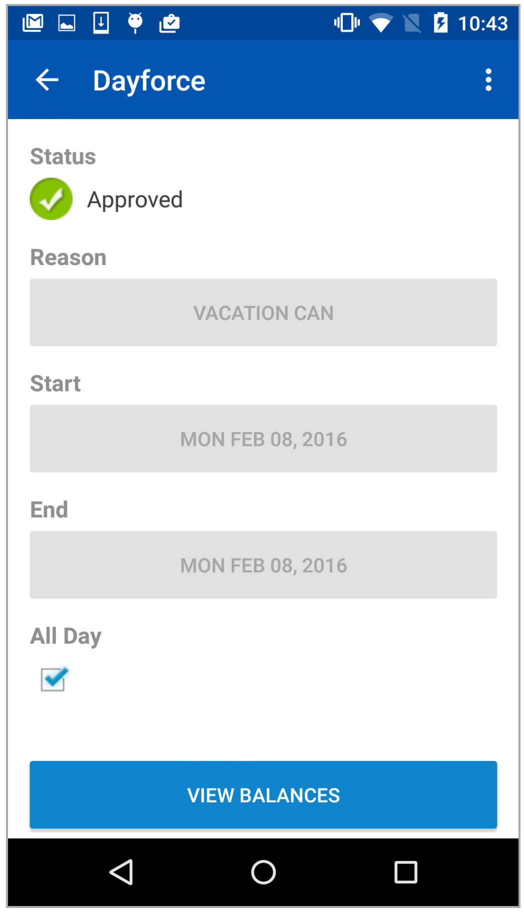
Holidays are marked with a holiday icon.



You can tap a day on the calendar to view a summary under the calendar. Here, the application displays additional information such as the status of a time away from work request, or the standby icon for on-call shifts that have not been confirmed:

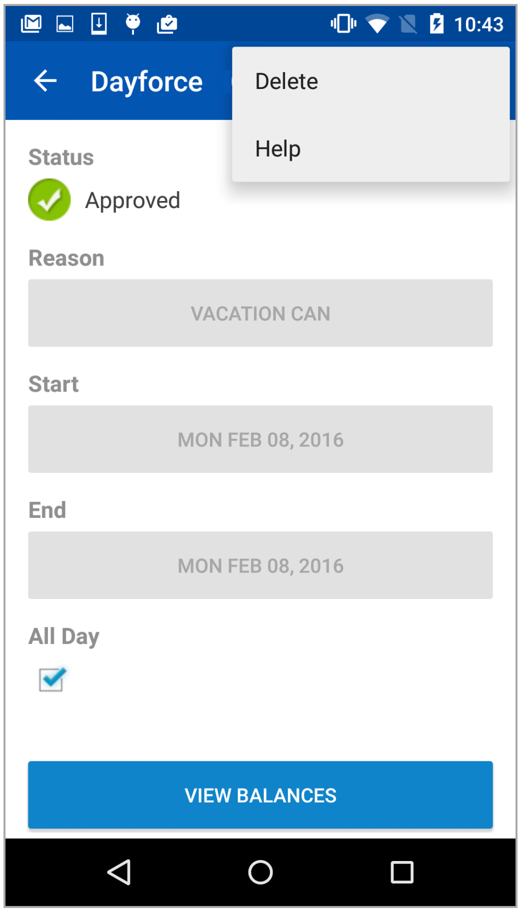
For approved time away from work requests, you can view more information about the request by tapping the summary. **The Time Away Request** screen displays the details and status of the request.



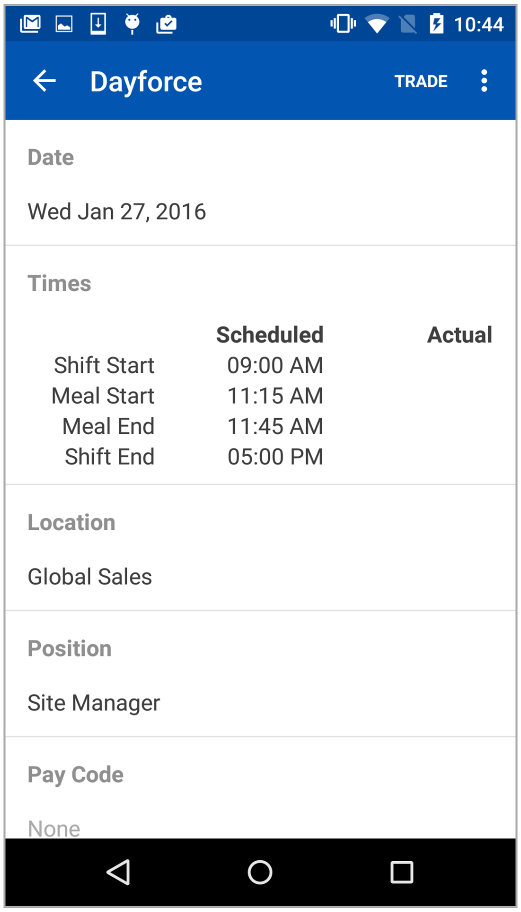


Note: You can only view the details of the request if your user role is also assigned access to the **Time Off** feature.

You can also delete the request from this screen by tapping the **Delete** button.



You can tap a shift summary under the calendar to open the shift details screen. Here, you can view shift times, location, job, any activities or tasks, and the pay code applied to the shift:



Press Back on your mobile device to return to the calendar.

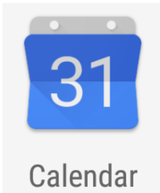
To return to the current day, open the context menu and tap **Today**.

Syncing to Your Local Calendar or Google Calendar

This section describes how to sync your monthly work schedule to your *Google* calendar, or the local (i.e., built-in) calendar application on your mobile device, including how to:

- Sync to Your Local Calendar
- Re-Sync Your Calendar
- Delete Your Calendar

Syncing your local calendar means that you can view your monthly schedule without logging into the Dayforce mobile application.



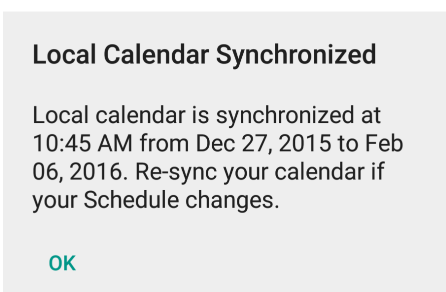
Note: After the initial calendar sync, you are responsible for routinely re-syncing your local calendar application so that it contains the most recent version of the schedule. The **Calendar** feature of the mobile application notifies you when a re-sync is required. For more information, see **Re-Sync Your Calendar** on page 150.

Note: Calendar sync functionality is only intended for the local (built-in) calendar application of the Android device; third-party calendar applications are not supported.

Sync to Your Local Calendar

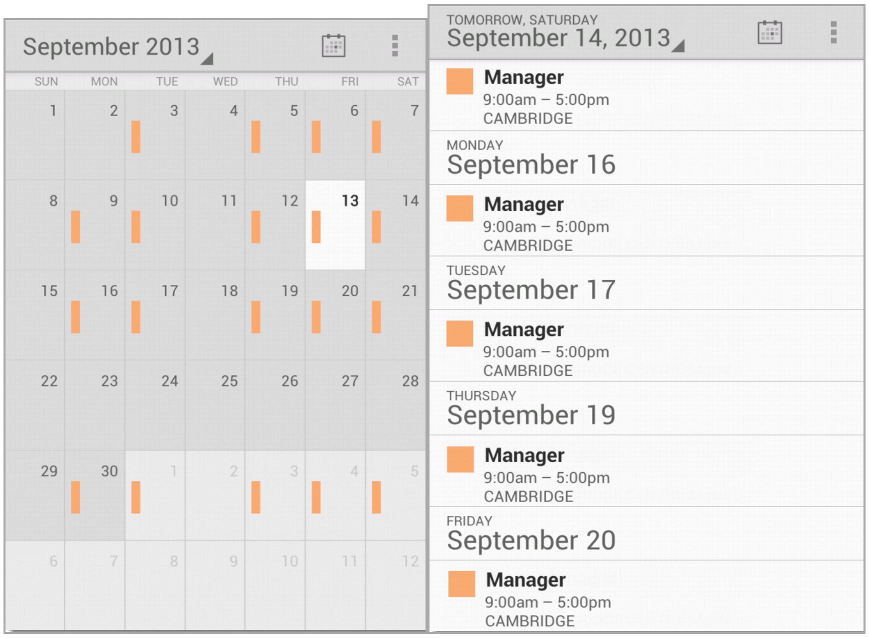
This section describes how to sync your calendar for the first time, which involves creating a Dayforce calendar on your local calendar application.

1. In the **Calendar** feature, select the month that you want to sync (the application syncs only the month that is displayed).
2. Open the context menu and select **Local Calendar**.
   The application asks for your permission to create a calendar on the local calendar application of your mobile device. The calendar is named “Dayforce_{Company ID}” (for example, “Dayforce_Example123”).
3. Tap the **Allow** button.
   The application reminds you that you need to re-sync your calendar if your schedule changes.

4. Tap the **OK** button.

   When you exit the Dayforce mobile application and open your local calendar application, you can view shifts from the month that was synced. For example:



In the example above, only shifts from the September calendar are synced. Shifts from October 1st to 5th are also synced because they fall on the September calendar. However, to view October shifts from the 6th onward on the local calendar application, you need to perform a separate sync for the month of October. Note also that holiday or time away from work information is not synced; the calendar sync only transfers scheduled shifts.

Once the Dayforce calendar has been created, you can then control its visibility using the visibility settings of your local calendar application.

Note: For more information about managing your local calendar application, refer to your device user manual.

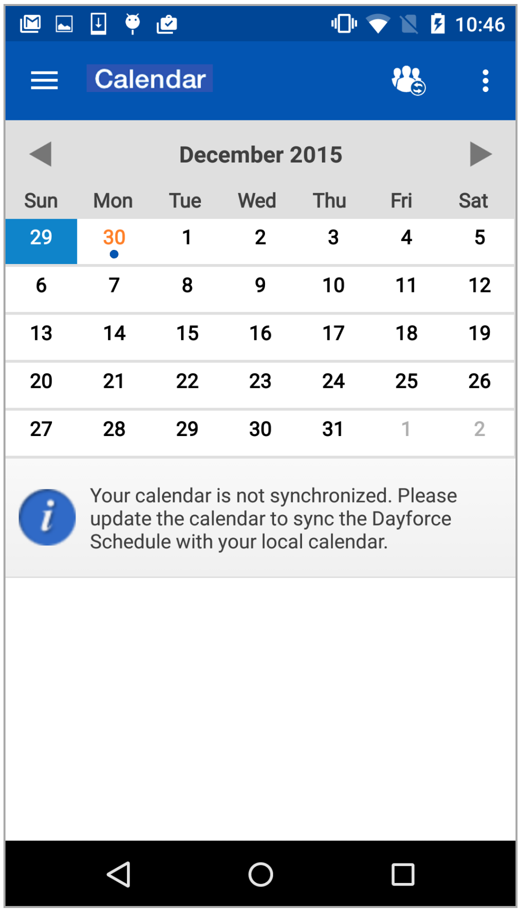
Sync to Your Google Calendar

To synchronize your *Google* calendar do the following:

1. In the **Calendar** feature, select the month that you want to sync (the application syncs only the month that is displayed).
2. Tap the context menu in the upper right-hand side.
3. Tap **Schedule Settings**.
4. Select your *Google* calendar as the calendar that you want to synchronize.
5. Choose an account from the list of accounts that you want to synchronize to. You also have the option to add an account.
6. Tap **Ok**.
7. If this is the first time you are synchronizing data to the selected account, you will be prompted to grant Dayforce access to your calendar.
8. Save to synchronize your calendar schedule.
9. Open your *Google* calendar and tap the synchronize symbol beside your account name to complete the synchronize process. You also have the option to refresh your calendar.

Re-Sync Your Calendar

This section describes how to re-sync your calendar when your schedule changes. When you open **Calendar** feature of the Dayforce mobile application, if your schedule changes, the application notifies you that your calendar is not synchronized and marks the days with changes in orange:



To re-sync your local calendar, tap the out of sync message, a message will display detailing the days that will be updated. Click **Ok** to re-sync the calendar.

The application stops displaying the orange indicators and the re-sync notification.

Delete Your Calendar

This section describes how to completely remove the Dayforce calendar from your mobile device.

You can only delete the calendar though the Dayforce mobile application (it cannot be deleted through the local calendar application). To delete the calendar, do either A or B:

A. In the main login screen of the Dayforce mobile application (without having to log in):
   1. Open the context menu and tap the context menu on the upper right.
   2. Tap **Manage Accounts**.

The application displays the **Accounts** screen.

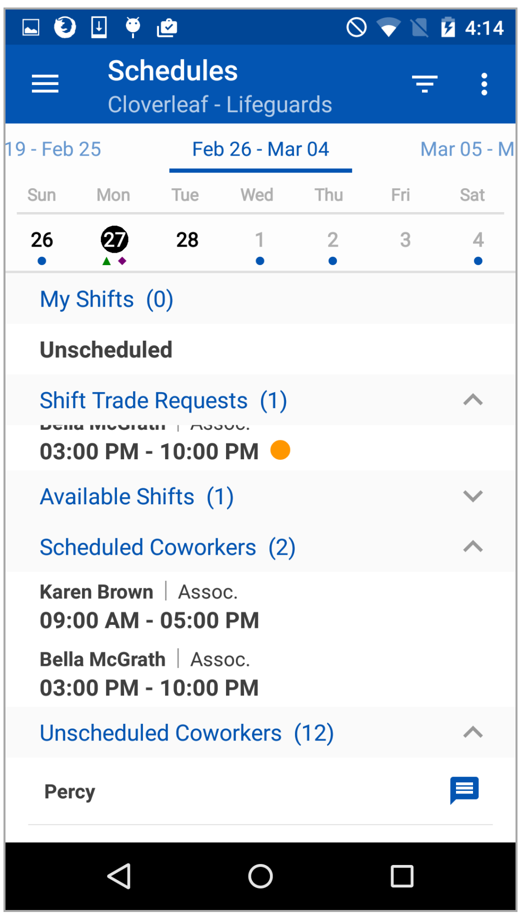
3. Select the**Delete Local Dayforce Calendar** button.

B. In the **Calendar** feature of the Dayforce mobile application, open the context menu and tap the **Delete Calendar** option.

Schedules

The **Schedules** feature allows you to see the shift details for a given day for scheduled coworkers that share the same work assignment (location + department + position) as you, and unscheduled coworkers that work at the same location as you. With this knowledge, you are able to make more informed shift swap or shift offer decisions to your coworkers. Additionally, you can send and receive direct messages from your coworkers from the **Schedules** feature. This creates transparency where you have easy access to view your coworker's schedules, and opens the lines of communication by enabling you to send and receive messages.

Note: Where applicable the app displays position names and location names beside the shift to account for the cases where you work more than one position and work at more than one location.



Setup

Configure role feature access authorization in the main application in: **System Admin** > **Roles** > **Features** > **Mobile** >**Schedules**.

Before You Begin: Please note that you have the following 3 configuration options in the main application for the **Schedules** feature in **System Admin** > **Roles** > **Features** > **Mobile** >**Schedules**: To display all coworkers that are not scheduled to work on a given day select the option: **Display Unscheduled Coworkers**. To display scheduled coworker information based on the employee's work assignment (department and position) select the option: **Restrict By Employee Work Assignments**. To enable shift trading (the ability to post, swap and offer shifts) select the option: **Shift Trades**.

Schedules Icons

Scheduled shifts. Displayed in the calendar.

Shift trade requests. Displayed in the calendar.

Offered or swapped shift that is waiting on manager approval.

Note: Manager approval needs to be turned on in the shift trade policy.

Offered or swapped shift that is waiting to be accepted or declined.

Shifts that can be traded.

Shifts that span more than one calendar day (i.e., 6:00 PM to 1:00 AM).

Note: The second calendar day begins after midnight.

On-call shift that has been confirmed.

On-call shift that is on standby.

On-call shift that is scheduled.

Schedules Details

The following sections and options are available in the **Schedules** feature:

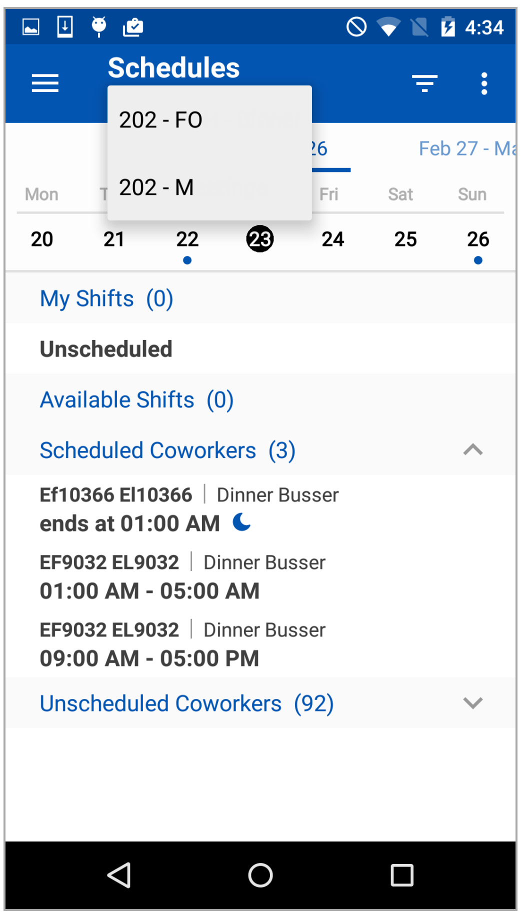
- Location picker
- Calendar
- My Shifts
- Shift Trade Requests
- Available Shifts

- Scheduled Coworkers
- Unscheduled Coworkers
- Message
- Filter
- Schedules Grid View

Location Picker

By default, your primary work location is displayed at the top of the screen. All shifts that are displayed in **Available Shifts**, **Scheduled Coworkers** and **Unscheduled Coworkers** reflect the location that is displayed. If you work at more than one location **My Shifts** and **Shift Trade Requests** sections display all shifts for all locations, so those listings are not dependent on the location picker.

Open the location list by tapping the chevron icon ( ) beside the location name at the top of the screen. If you work at one location, the chevron icon is not displayed.



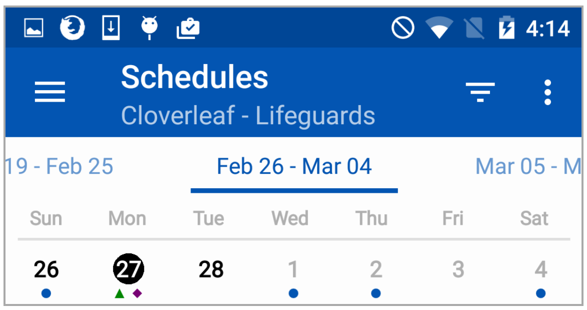
Change your location by doing the following:

1. On the **Schedules** home screen, tap the location that is displayed to open the picker.
2. Select a location from the list to close the picker.

Calendar

The calendar displays one week with the current date selected by default. In addition to the current week, the calendar displays your schedule 5 weeks into the future. Swipe left or right to select a different week. To select a specific day, tap on a day. The following icons are displayed in the calendar in relation to your schedule:

- Scheduled shifts - blue circle
- Shift trade requests - purple diamond
- Available shifts - green triangle



My Shifts

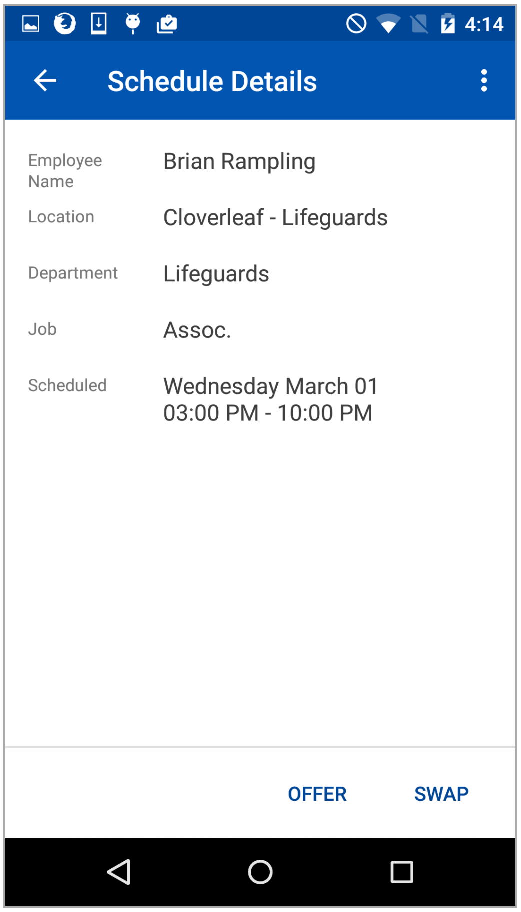
My Shifts displays the following:

- Your scheduled shifts
- Your shift trade requests

Note: If you work at more than one location all shifts for all locations are listed in the **My Shifts** section. This listing is not dependent on the location picker.

Scheduled Shifts

These shifts are marked with a blue circle ( ) in the calendar. If you work at more than one location, the app displays the location name beside the shift. If you only work at one location, the location name is not displayed beside the shift but is displayed in the shift details. Select a shift to see the shift details and the option to **Swap** or **Offer** the shift if applicable.



Note: Swap and **Offer** shift trade options in the shift details screen for **My Shifts** are displayed only if your shifts can be traded, and when shift trade is enabled in the main application.

Shift Trade Requests

These shifts are marked with a purple diamond ( ) in the calendar, a blue and orange circle ( ) if you offered the shift and you are waiting for your coworker to accept or decline it, or an orange circle ( ) if the shift is waiting for manager approval. If you work at more than one location, the app displays the location name beside the shift. If you work at one location, the location name is not displayed beside the shift but is displayed in the shift details. Select a shift to see the shift details and the option to **Revoke** the shift trade.

Swap Shifts

Do the following to swap shifts with your coworker:

1. In the **My Shifts** section, open a shift.
2. Tap **Swap**.
3. Tap **Select a Schedule**.

4. In the search screen specify the following:
    - Start time
    - End time
    - Employee
5. Tap **Search**.
6. From the search results select an employee that you want to swap with.

    Note: The app displays a list of employees who share the same work assignment (location + department + position) as you. Employees cannot shift trade between locations but the list displays employees who can accept the swap based on their scheduling configuration.
7. In the **Swap Shift** screen confirm your shift with your requested shift and tap **Swap Shift**.

Offer a Shift

Do the following to offer a shift to a specific coworker or post a shift to any coworker:

1. In the **My Shifts** section, open a shift.
2. Tap **Offer**.
3. In the **Offer Shift** screen specify if you are offering a **Partial Shift** or the whole shift. If it's a partial shift do the following:
    a. Move the slider to the right to specify that it's a partial shift.
    b. Tap the start time, and then use the dial to specify the time.
    c. Tap the end time, and then use the dial to specify the time.
4. Tap **Select an employee** to open the **Employee** screen.

    Note: The app displays a list of employees who share the same work assignment (location + department + position) as you. Employees cannot shift trade between locations but the list displays employees who can accept the swap based on their scheduling configuration.
5. In the **Employee** screen, select an employee or choose **Any**.
6. In the **Offer Shift** screen tap **Confirm**.

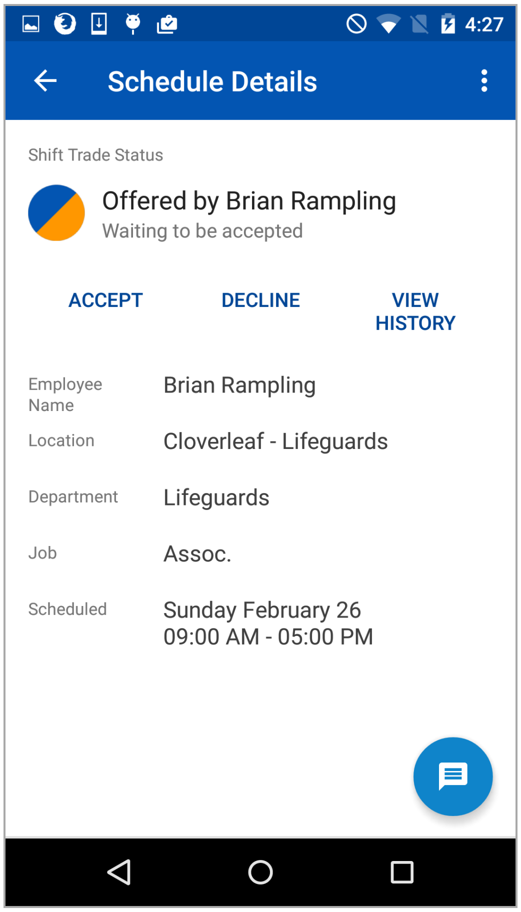
Revoke a Shift Trade

Do the following to revoke a shift trade after you offer or swap your shift to your coworker:

1. In the **My Shifts** section, open the shift that you want to revoke.
2. In the **My Shift** screen, select **Revoke**.
3. In the confirmation dialog, select **Revoke**.

Shift Trade Requests

Shift Trade Requests displays the shifts that are available to you as a swap or offer. These shifts are marked with a purple diamond ( ) in the calendar, a blue and orange circle ( ) in the shift details if the shift is waiting to be accepted or declined by you, or an orange circle ( ) in the shift details if the shift is waiting for manager approval. Select a shift to see the shift details and the option to **Revoke** the shift trade if applicable.



Note: If you work at more than one location all shifts for all locations are listed in the **Shift Trade Request** section. This listing is not dependent on the location picker.

Note: The **Shift Trade Requests** section is not displayed if there are no available trades for you to review. Also, shift trading needs to be enabled.

Do the following to review a shift trade request:

1. In the **Shift Trade Requests** section, open the shift.
2. After you review the shift, tap **Accept** or **Decline**.
3. In the confirmation dialog make your selection.

Revoke a Shift Trade

Do the following to revoke a shift trade after you accept it from your coworker:

Note: The revoke button display is applicable in cases where shift trade for your organization is configured so that managers have to approve shift trades.

1. In the **Shift Trade Requests** section, open the shift that you want to revoke.
2. In the **Schedule Details** screen, select **Revoke**.
3. In the confirmation dialog, select **Revoke**.

Shift Trade History

Do the following to view your general shift trade history:

1. On the **Schedules** feature home page select the context menu on the upper right.
2. Select **Shift Trade History**.
3. Optionally, tap the **Load More Past Trades** button.

Do the following to filter your general shift trade history:

1. On the **Schedules** feature home page select the context menu on the upper right.
2. Select **Shift Trade History**.
3. Select the filter icon to open the filter screen.
4. Select the statuses that you want to filter by.
5. Tap **Apply**.

Do the following to view the shift trade history for a specific trade:

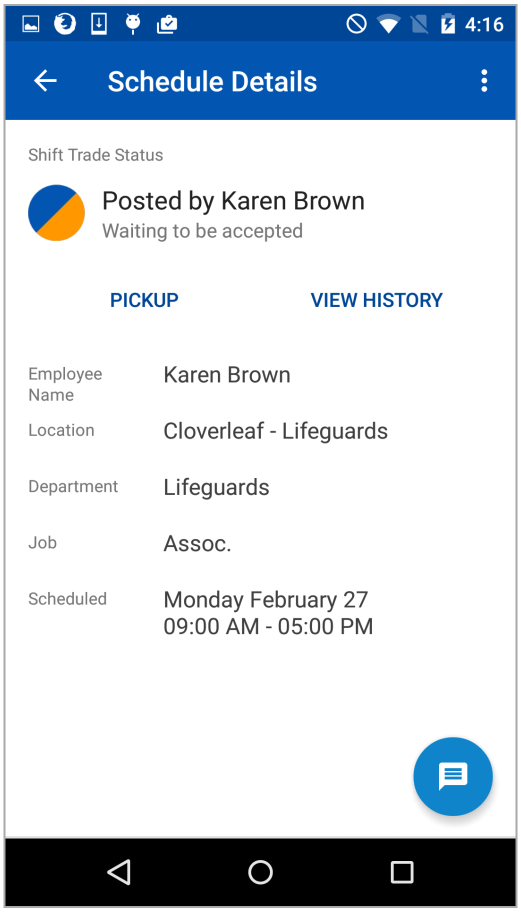
1. On the **Schedules** feature home page select the shift you want to view.
2. In the **Schedule Details** screen tap **View History**.

Do the following to view the shift trade history for a specific trade:

1. On the **Schedules** feature home page select the shift you want to view.
2. In the **Shift Details** screen tap the shift to view the shift trade history.
3. Select the filter icon to open the filter screen.
4. Select the statuses that you want to filter by.
5. Tap **Apply**.

Available Shifts

Note: The **Available Shifts** section is displayed only if shift trading is enabled in the main application.



Pick up a Shift

Do the following to pick up an available shift:

1. In the **Available Shifts** section, open a shift.
2. In the **Shift Details** screen tap **Pickup Shift**.
3. In the confirmation dialog make your selection.

Scheduled Coworkers

Scheduled Coworkers displays the coworkers that are scheduled to work at the location that is displayed at the top of the screen in the location picker. These coworkers share the same work assignment (location + department + position) as you. If you work at more than one location, the primary work location is displayed by default. Select a shift to see the shift details along with the option to send a message to your coworker.

Unscheduled Coworkers

Unscheduled Coworkers displays the coworkers who are not scheduled, but work at the same location as you. The location name is displayed at the top of the screen in the location picker. If you work at more than one location, the primary work location is displayed by default. When you tap beside the employee's name, the app displays the **New Message** screen for you to send them a message.

Note: The **Unscheduled Coworkers** section is displayed only if it is enabled in the main application.

Note: In order to send messages in the **Schedules** feature, you need to have access to the **Messages** feature, and the ability to send new messages sub-feature.

Message

As an employee you may want to send a message to a scheduled employee about a shift, or send a message to an unscheduled employee about taking a shift.

Note: In order to send messages in the **Schedules** feature, you need to have access to the **Messages** feature, and the ability to send new messages sub-feature.

Setup

Configure role feature access authorization in the main application in **System Admin** > **Roles** > **Features** > **Mobile** > **Messages** > **Can Create New messages**.

Do the following to send a message to a scheduled or unscheduled coworker:

Scheduled Workers

1. Tap the shift of a coworker to open the shift details.
2. Tap the message icon to launch the **New Message** screen.
3. Compose and send the message.

Unscheduled Workers

1. Tap the message icon that is beside the employees name to launch the **New Message** screen.
2. Compose and send the message.

Filter

The filter function is used to refine shifts that are displayed in the **Available Shifts** and **Scheduled Coworkers** sections. When the filter is turned on, the app displays a checkmark beside the filter icon. Tap the filter icon ( ) to filter using the following options:

- Department
- Job
- Shift Period

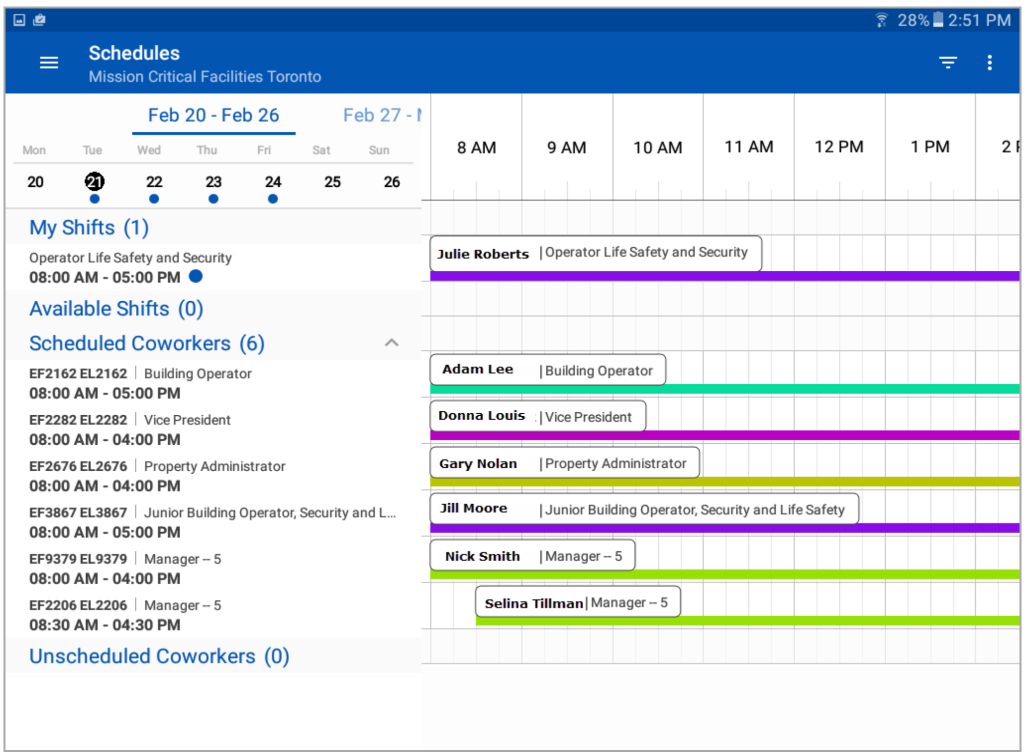
In addition, you have the option to show or hide the following:

- Available Shifts
- Overlapping Shifts Only
- Unscheduled Coworkers

Schedules Grid View

The following applies to the **Schedules** Grid View:

- The home screen interface is the same as the mobile display on the left side of the screen, the grid is displayed on the right side.
- The grid scrolls under the left side display.
- The app displays the grid in portrait view and landscape view.
- The app displays different colors based on the employee's position, the same as the main application.
- Tap the shifts on the left side to perform your actions: access shift details, message coworkers, and shift trading.



TeamRelate

TeamRelate is designed to provide insight into your communication style, and how you can adapt your style to better communicate with your team. With its integration into Dayforce, you can access this information directly within the app, providing a single user experience.

About TeamRelate

There are two main components to a TeamRelate profile: communication style and core convictions. These are described in the next two sections.

Communication Styles

Your communication style is the set of behaviors that you naturally gravitate toward when you communicate. There are four communication styles:

- Director - Direct, driven, and fast-paced.
- Encourager - Enthusiastic, warm, and optimistic.
- Facilitator - Calm, patient, and deliberate.
- Tracker - Careful, tactful, and accurate.

Core Convictions

Your core convictions are the motivators for your behavior. There are four core convictions:

- Ambition - Motivated by continual improvement for themselves and their organization.
- Belief - Motivated by integrity and ethical standards for themselves and within their workplace.
- Compassion - Motivated by helping others.
- Discipline - Motivated by the completion of tasks or goals.

TeamRelate Survey and Profile

Once you complete the TeamRelate survey, you can view your communication style, and check in directly from the mobile app.

- When you first log in, there is a link to complete the TeamRelate survey.
- When you complete the survey, your TeamRelate profile is created.
- Your TeamRelate traits are displayed in the navigation panel beside your avatar.
- You can Check in to give feedback on your day. This generates your personal engagement score and can provide valuable information to colleagues looking to interact with you.
- Managers can view their employee's TeamRelate trait details and suggestions on how to give feedback, motivate, and navigate conflict based on those traits.

TeamRelate Survey Link

The first time you log in, you can access the link to complete the TeamRelate survey from the widget on the home screen, and in **My Profile**.

Take the TeamRelate Survey

1. Answer each question by moving the slider to the left or right.
2. Go to the next or previous question by tapping on the arrow on the left or right.

- The survey consists of 50 questions.
- You cannot go to the next question until the current answer is selected.
- All survey questions must be answered before you can save your survey. You cannot save your survey if it is incomplete.
- When you complete the survey your TeamRelate profile is created in the **My Profile** feature.

Re-take the TeamRelate Survey

You can retake the survey at any time if you don't agree with the results or if you want to update your traits. Do the following to re-take the TeamRelate survey:

1. In the navigation menu, tap **My Profile**.
2. In the **Personal Engagement** section, tap the info icon (ⓘ)to open your TeamRelate profile.
3. In the **TeamRelate Profile** screen, scroll to the bottom.
4. Tap the **Retake Survey** link.

TeamRelate Traits in the Navigation Panel

The app displays your TeamRelate traits in the navigation panel, beside your avatar. The following points apply:

- If you haven't taken the survey, your traits are not displayed in the navigation panel.
- To open TeamRelate details in **My Profile**, tap the avatar. If your role does not have access to **My Profile**, the app remains on the same screen.
- If you have more than one role, your traits are displayed for all roles listed in the navigation panel.

Checking In

Checking in allows you to give feedback on your day, and generates your personal engagement score. This feedback can provide valuable information to colleagues looking to interact with you.

Note: The check in option is available after you complete the survey.

The check in links are on the **Home** screen widget and in **My Profile**. The app displays the results of your last check in, thus if you never checked in, the check in link is displayed without a personal engagement score.

Note: The Check in widget is displayed in the app by default. If you do not want the widget to be displayed, you can configure it.

To check in, do the following:

1. Tap the widget on the **Home** screen, or the link in **My Profile**.
2. On the check in screen, use the sliders to specify the levels for each personal engagement attribute.
3. Tap **Save** when you are finished.
   Your personal engagement score is displayed.

View Employee Profiles and Toolkits

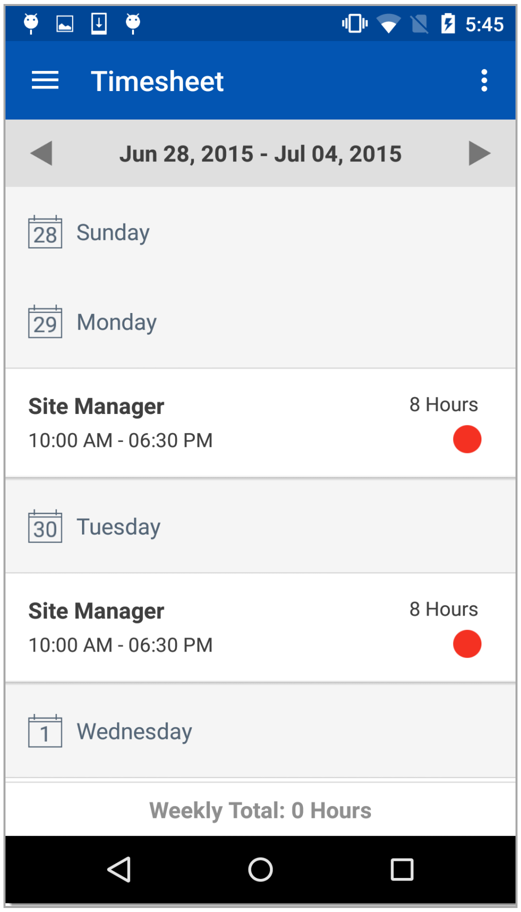
As a manager, you can view the TeamRelate traits of your employee's. In addition, you can also view suggestions on how to give feedback, motivate, and navigate conflict based on the employee's communication style and core convictions.

To view employee TeamRelate profiles, do the following:

1. In the navigation menu, tap the **Employees** feature.
2. Select an employee from the list who has TeamRelate traits displayed.
3. Tap the info icon ( )to open their TeamRelate Profile.
4. Tap the toolkit icon ( )to view their Toolkit.
   The toolkit screen is divided into 4 separate tabs:
   - How to give feedback.
   - How to motivate.
   - How to maintain compatibility.
   - How to resolve conflict.
5. Tap each tab to review the suggestions on how to approach the employee based on their traits.

View and Edit Your Timesheet

Through the **Timesheet** feature, you can view the hours you worked each week. The application displays the number of hours you were scheduled to work, and displays an icon that signifies the status of the shift. The application also displays the weekly total of the hours worked.



Shift

Represents a scheduled shift you did not punch in for.

Represents a shift that you worked as scheduled.

Represents a scheduled shift that you are currently punched in for; you are currently 'on the clock', and once you punch out, the shift is marked with the icon.

Represents a shift that has started if you are an auto pay (i.e., paid to schedule) employee.

Represents a shift you are scheduled to work in the future.

Represents an unscheduled shift that you are currently punched in for; you are currently 'on the clock', and once you punch out, the shift is marked with the icon.

Represents a shift you worked, but were not scheduled for.

Shifts with transfers.

In addition to the status icons, the application also displays the following informational icons:

Pay Adjustment:

Represents a pay adjustment (hours / time).

Represents a pay adjustment (amount).

Authorization

Approved by employee.

Approved by manager.

Approved by both manager and employee.

Validation

Error. Displayed beside the shift and in the problem pane.

Warning. Displayed beside the shift and in the problem pane.

Information. Displayed in the problem pane.

Critical problems. The timesheet cannot be saved.

Pending data changes.

Miscellaneous:

Locked pay period.

Holiday.

Adding Editing and Deleting Shifts

To add a shift to your timesheet, select the day that you would like to add the shift. To edit a shift, select the appropriate shift.

The following parameters are available to specify for a shift:

- **Location**
- **Position**
- **Job**
- **Pay Code**: **Hours** or **Amount**, depending on the pay code. Filter pay codes by performing a search.
- **Project**: Displayed list is based on your employee number, assigned job and pay code.
- **Starts**/**Ends**
- **Docket** (if applicable).

- Labor metric information (if applicable). When you select a labor metric type, the app navigates to a screen with a list of labor metric values where you can perform a search, if needed, and make a selection for your timesheet.

To add **Meals**, touch the icon and enter the **Start** and **End** times, then open the menu and tap **Save**.

To add **Transfers**, touch the icon. Select **Add Transfer** from the menu and enter the transfer details. When you are finished, tap **Save**.

You can delete any punch data, including for shifts, breaks or transfers. When viewing **Edit Scheduled Shift**, **Transfer Details** or **Meal/ Break** screens, open the context menu and press the **Delete** button.

When you are finished editing the shift details, open the context menu and tap **Save** to add the shift to your timesheet.

Adding, Editing, and Deleting Transfers

Transfers are used when you switch between locations, projects, positions, or dockets, so that your time is tracked properly. For example, you were scheduled to work as a customer service representative, but during your shift you're asked to work as the department's assistant manager. You've worked 2 hours as a representative already. To record that you are switching to work as the assistant manager, you make a position transfer on your mobile device.

To add transfers, touch the icon and enter the transfer details. When you are finished, open the context menu and tap **Save**.

To edit an existing transfer, touch the icon. Update the transfer details. When you are finished, open the context menu and tap **Save**.

To delete an existing transfer, touch the . Open the menu and tap **Delete**.

Adding Pay Adjustments

Tap the appropriate day.

Touch the **Add Pay Adjustment** button at the top of the screen.

You can define the following parameters for the pay adjustment:

- **Location**
- **Position**

- **Pay Code**: **Hours** or **Amount**, depending on the pay code. Filter pay codes by performing a search.
- **Starts**/**Ends**
- **Docket** (if applicable).
- Labor metric information (if applicable). When you select a labor metric type, the app navigates to a screen with a list of labor metric values where you can perform a search, if needed, and make a selection for your timesheet.

When you have finished, open the menu and tap **Save**.

Deleting and Editing Pay Adjustments

Tap the appropriate pay adjustment.

To delete the pay adjustment, open the menu and touch **Delete**.

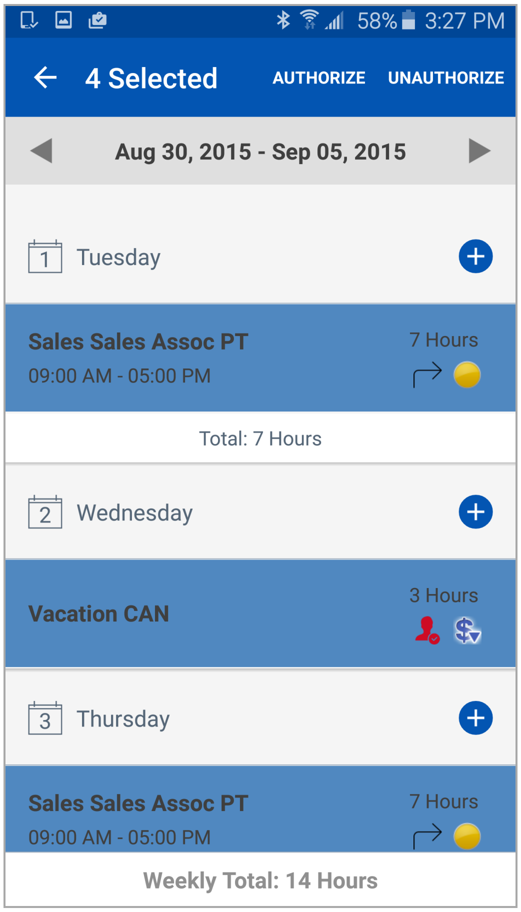
You can edit the following parameters for the pay adjustment:

- **Location**
- **Position**
- **Pay Code**: **Hours** or **Amount**, depending on the pay code. Filter pay codes by performing a search.
- **Starts**/**Ends**
- **Docket** (if applicable).
- Labor metric information (if applicable). When you select a labor metric type, the app navigates to a screen with a list of labor metric values where you can perform a search, if needed, and make a selection for your timesheet.

When you have finished, open the menu and touch **Save** to add the pay adjustment to your timesheet.

Authorizing and Unauthorizing Shifts and Pay Adjustments

You can authorize shifts and pay adjustments in your timesheet by pressing and holding a shift or pay adjustment until the app displays the **Authorize** and **Unauthorize** buttons. If necessary, you can then select other shifts or pay adjustments:

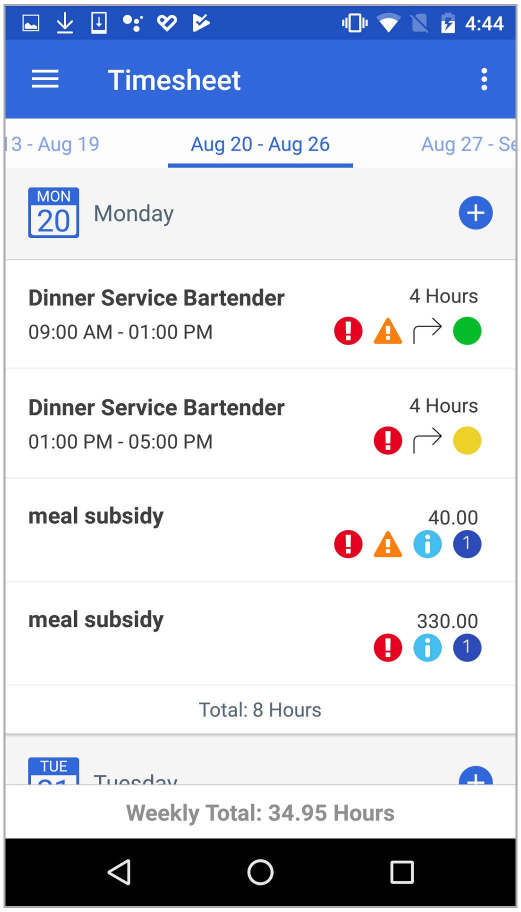


When you have selected all of the necessary items, tap **Authorize** or **Unauthorize**.

Timesheet Validation

The **Timesheet** feature uses validation to check for errors that might occur if information has not been input correctly.

This feature includes functionality that can prevent users from some common mistakes such as forgetting to save changes or updates to either new or adjusted timesheet entries. If the validation functionality finds a potential problem when you try to save a new entry, or a punch or pay adjustment, the app displays a problem icon in the Timesheet, as well as displaying a problem pane in the details screen for each of the problem entries.



Pending Changes in the Week View

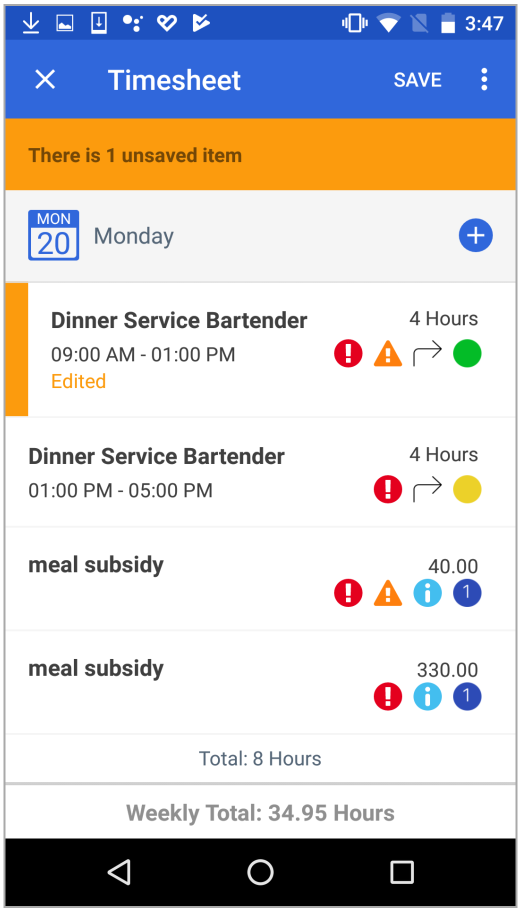
As part of timesheet validation, you can view the Timesheet to see which timesheet entries are pending confirmation and to see whether entries have been saved or not.

The **Timesheet** feature uses color coding for added, edited, and deleted punches and pay adjustments to make it easier for you to identify pending changes. When you add a punch, or a pay adjustment, the change is marked with a green Added indicator in the cell. If you delete a punch or pay adjustment, it is marked with a red Deleted indicator in the cell. If you edit an existing punch or pay adjustment, it is marked with an orange Edited indicator in the cell.

The Timesheet only displays the checkmark button on the Edit screen. The **Save** button is displayed in the Timesheet week view screen.

When you have added, edited, or deleted punches or pay adjustments in the Edit screen, tap the checkmark button to return to the Timesheet week view screen. Here you view any pending (unsaved) punch and pay adjustment entries, which are indicated with a yellow Pending indicator to the left of the cell of the entry. You cannot navigate to a different week if there are still pending changes in the Timesheet week view screen.

You can select the entries for pending changes and tap the **Save** button to save them. When there are no more pending changes in the Timesheet week view screen, you can navigate to another week in this screen.



Save Pending Changes in the Week View

To save pending changes in the week view tap **Save**.

The app saves the pending entries and you are now able to navigate to a different week. If there are any errors you will need to resolve them before you can save those entries.

Display of Errors in the Week View

As part of timesheet validation, the **Timesheet** feature displays any problems associated with Timesheet entries in the Week view, enabling you to enter correct information and resolve other problems.

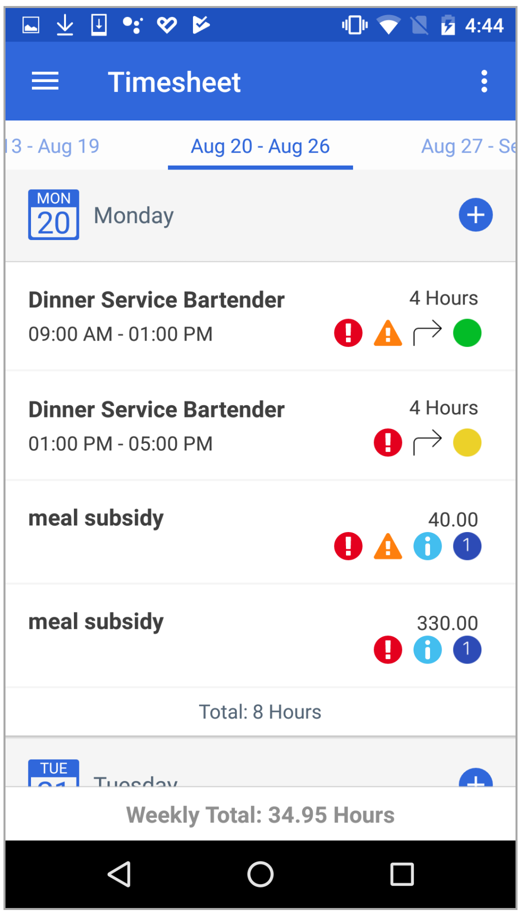
If there are potential problems with punch or pay adjustment in the Week view that you try to save, the Timesheet displays an icon to the left of the existing timesheet icon, as well as displaying a color indicator on the far left side of the cell, next to the problem icon, depending on the type of problem message: Error (red), Warning (orange), or Information (blue). An underline is also displayed in the cell if it contains a critical error.

Punches can have more than one problem icon. These are displayed on the same line as the punch time, unless there are too many problem icons, in which case they are moved to their own line below the problem entry. Problem types and their icons are displayed in the order Error ( ), Warning ( ), and Information ( ).

If there is a critical error with an entry, and you try to save it, the app displays the message "There are critical problems; the timesheet data cannot be saved." You cannot navigate to a different week if there are critical errors in the Timesheet week view screen.

In the event that data fails to save, the application displays the message "Failed to validate timesheet data."

If there are one or more warnings present for entries, but data can be saved, the app displays the problem icon but permits you to save the entries.



Resolve Timesheet Errors in the Week View

Take the following steps to resolve your timesheet errors in the week view:

1. Tap the row entry where the error icon is displayed. The app displays the shift in **Shift Details** screen.

2. Make your corrections to the shift.
3. Tap the checkmark button.
   Repeat steps 1 - 3 for all existing row entries that contain errors.
   Note: As you resolve your timesheet errors the app also removes them from the problem pane.

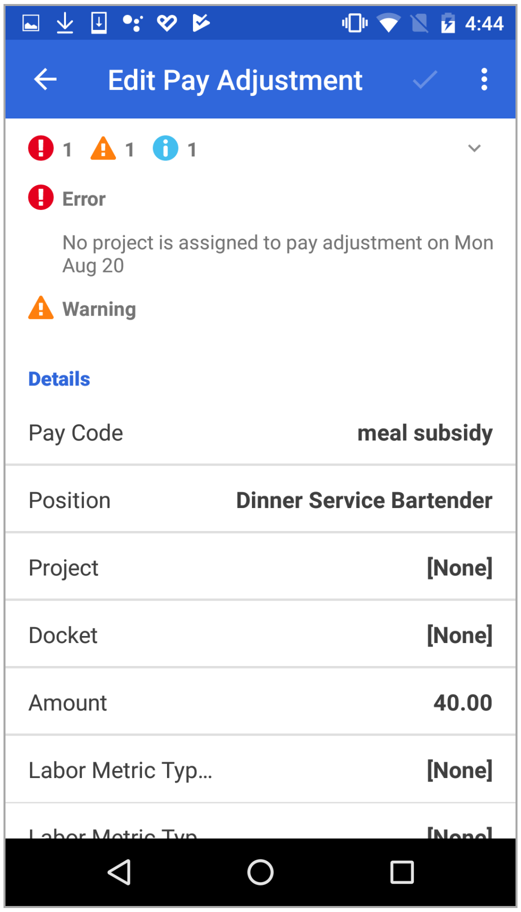
Problem Pane for Editing Shifts and Pay Adjustments

As part of the timesheet validation, the app validates data in the background as you enter information, identifying and displaying any problems associated with punches or pay adjustments as you are editing them, which helps you make corrections as needed.

If there's a problem with a punch or pay adjustment, you can view the details screen for the entry to see the problems pane that contains a problem type icon (error ( ), warning ( ), or information ( )) and a number by each icon to indicate type and number of problems that exist for an entry. The problem pane is expanded by default, and can accommodate three messages. If there are more than three messages for an entry, you can scroll through them. You can also collapse the problem panel as necessary.

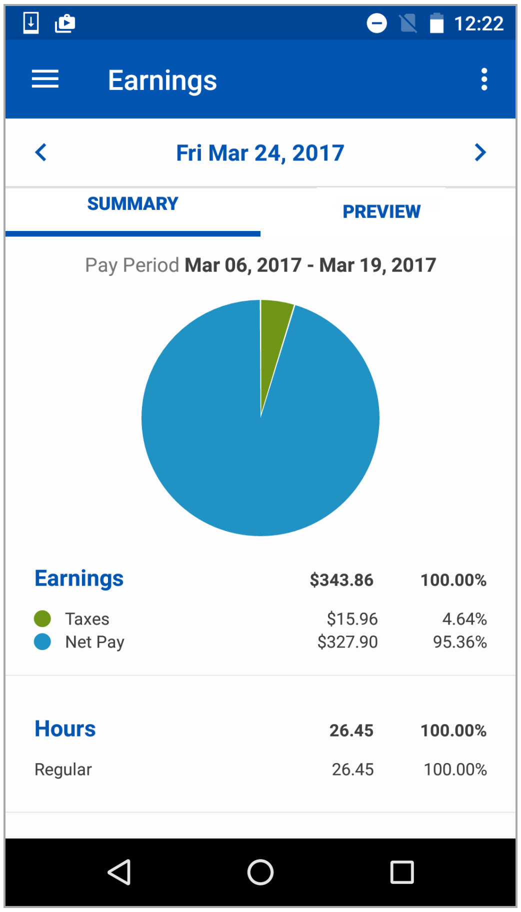
Problems are grouped by type, from most to least severe: Error, Warning, and Information. Critical error descriptions are displayed with an underline, in the same way that critical errors are displayed with an underline in the week view.

If your changes to an entry resolve the problem with that entry, the problem message is removed from the problem pane, as well as from the week view.

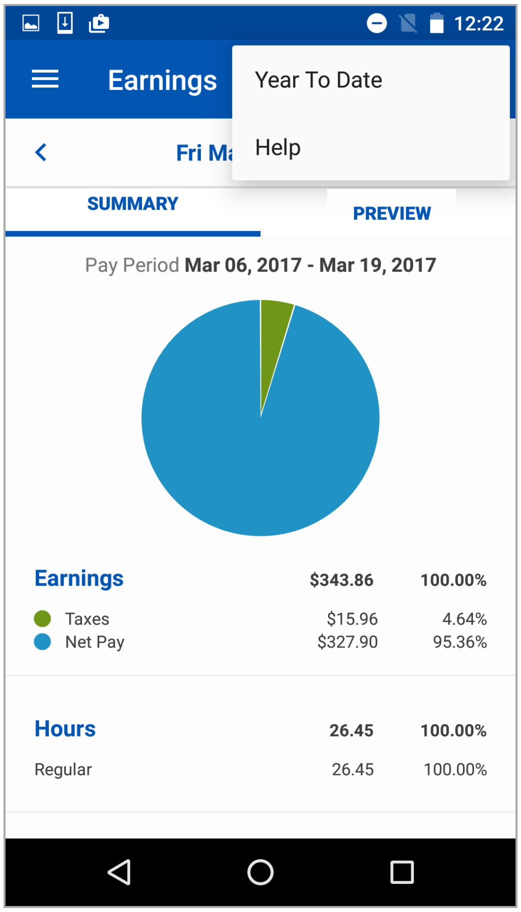


View your Earnings Statement

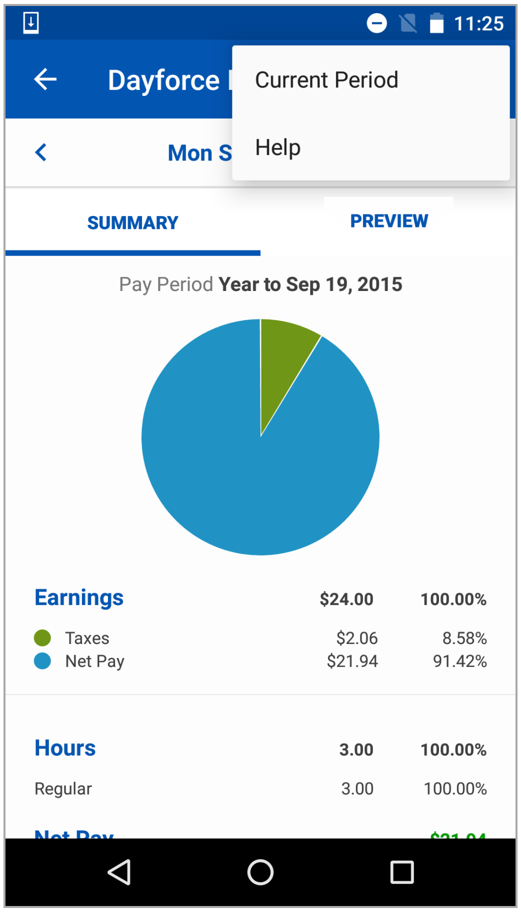
The **Earnings** feature allows you to view a mobile version of your earnings statement, which is available in the main application on the **My Earnings** tab. When you first open the **Earnings** feature, after you select the pay period that you want to view, the app displays the **Summary** tab which consists of your **Net Pay**, **Hours**, and **Earnings**, using a pie chart:



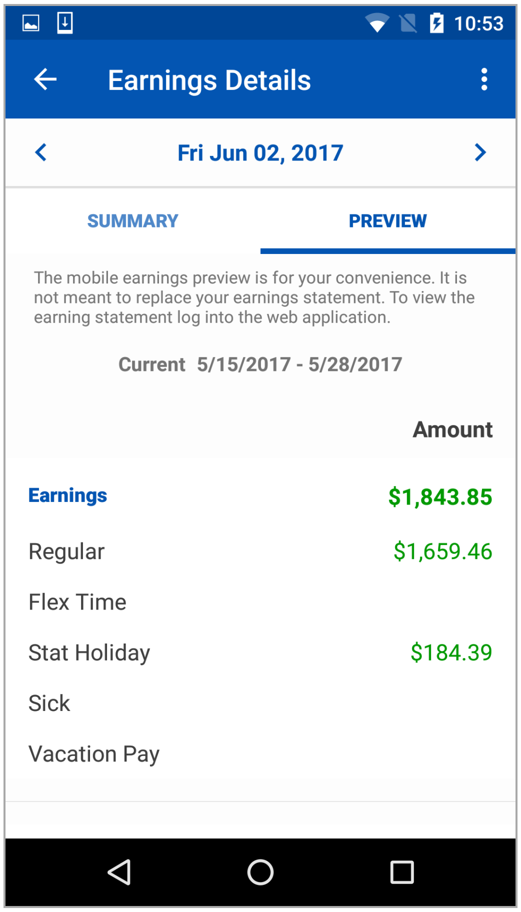
Tap the context menu on the upper right to switch views to display the **Year To Date** in a pie chart summary:



Switch back to display the **Current Period** by selecting it from the context menu:



Tap the **Preview** tab to see your earnings statement for the pay period that you selected:



You can navigate between periods either using the arrows at the top of the screen, or by swiping across the screen.

Note: When you open the **Earnings** feature, and there are no results the app displays a **No Data Available** message.

View Your Payroll Card Transactions

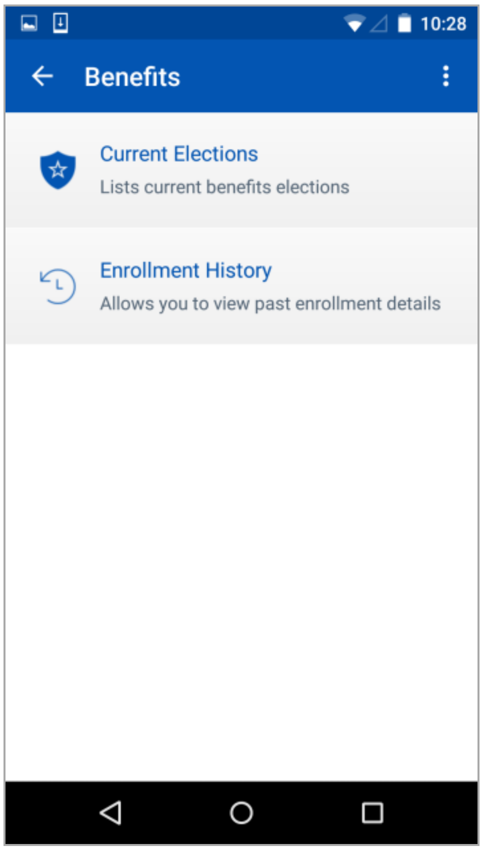
The **Payroll Card** feature allows you to view transactions on your Comdata Payroll Card.

Touch the arrows at the top of the screen to load different periods.

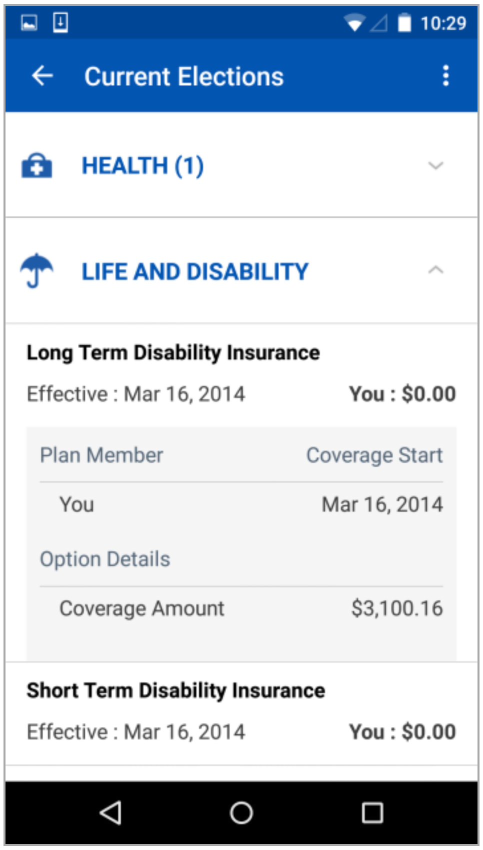
View Benefit Elections and Enrollment History

You can view your current benefit elections and enrollment history in the mobile apps. Previously, you could only access this information in the main application. Now, it is available in the new **Benefits** feature:

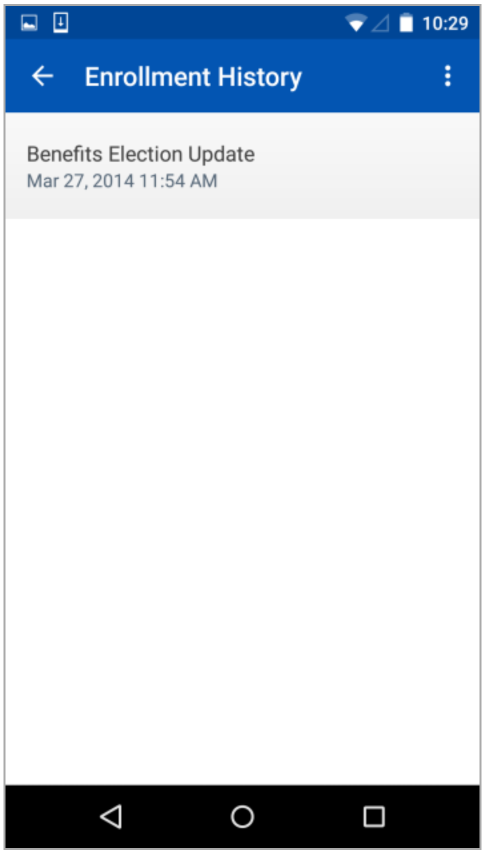
When you tap the **Benefits** icon, the app displays the two types of information you can view:



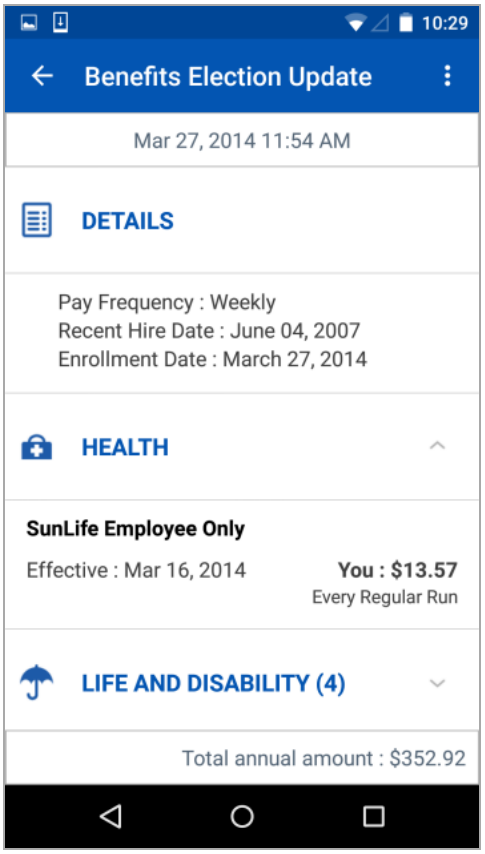
When you tap **Current Elections**, the app displays your elections, organized into groups. When you tap one of the elections, the app displays additional information such as plan members:



When you tap **Enrollment History**, the app displays previous updates to enrollments:



When you tap on an update, the app displays additional details. As with **Current Enrollments**, you can expand and collapse sections to view more info:


10:29
Benefits Election Update
Mar 27, 2014 11:54 AM
DETAILS
Pay Frequency : Weekly
Recent Hire Date : June 04, 2007
Enrollment Date : March 27, 2014
HEALTH
SunLife Employee Only
Effective : Mar 16, 2014
You : $13.57
Every Regular Run
LIFE AND DISABILITY (4)
Total annual amount : $352.92