



**dayforce**

# Managers Guide

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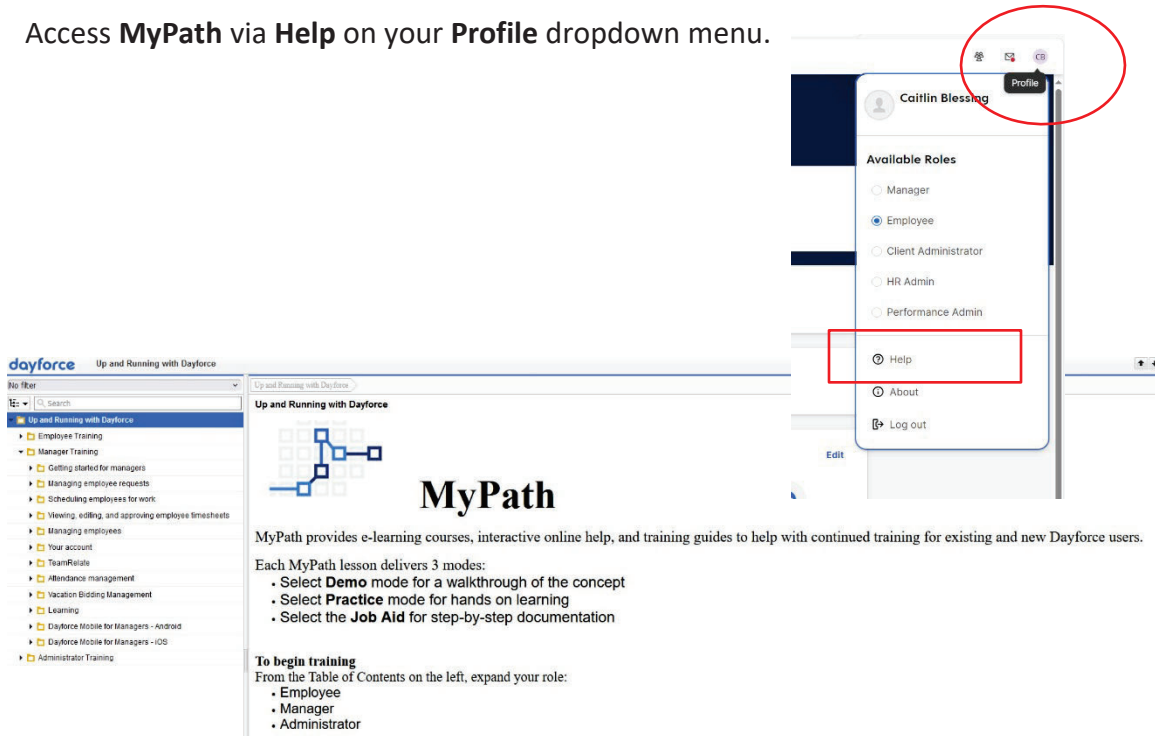
## Welcome to Dayforce

This Manger Guide will familiarize you with Dayforce navigation and how to access information about your direct (and indirect) reports. Tasks are included for you to familiarize yourself with the system and complete your profile.

## Help(ful) Resources

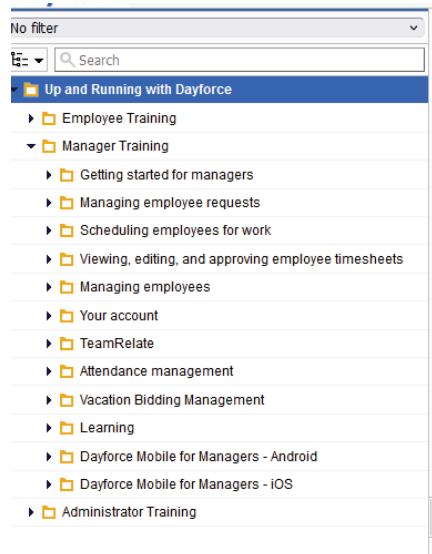
**MyPath** is a robust Dayforce resource and will show you how to use Dayforce. However, some functionality covered in MyPath is not in use in AUI's Dayforce (e.g., Time Away). Time and Attendance is managed in Costpoint.

Access **MyPath** via **Help** on your **Profile** dropdown menu.

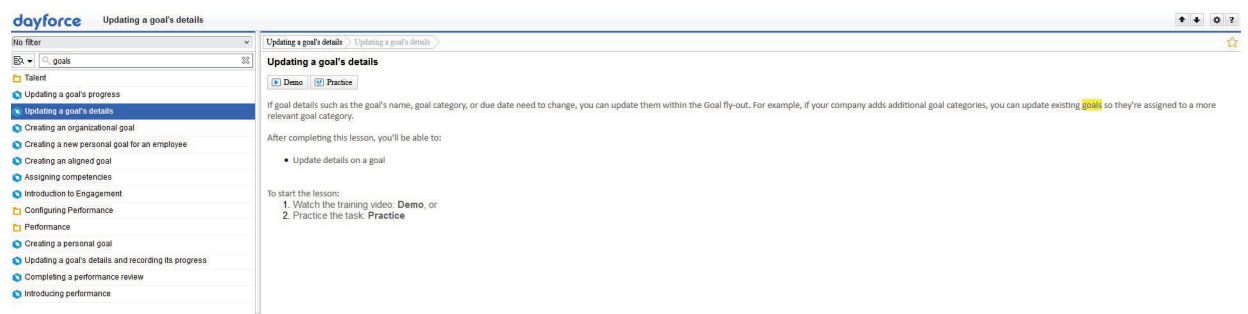


The image shows a screenshot of the Dayforce user interface. On the left, there is a navigation menu with a search bar and a list of training topics under 'Up and Running with Dayforce', including 'Employee Training', 'Manager Training', 'Getting started for managers', 'Managing employee requests', 'Scheduling employees for work', 'Viewing, editing, and approving employee timesheets', 'Managing employees', 'Your account', 'TeamRelate', 'Attendance management', 'Vacation Bidding Management', 'Learning', 'Dayforce Mobile for Managers - Android', 'Dayforce Mobile for Managers - iOS', and 'Administrator Training'. The main content area displays the 'MyPath' logo and a list of training resources. Below the logo, it states: 'MyPath provides e-learning courses, interactive online help, and training guides to help with continued training for existing and new Dayforce users. Each MyPath lesson delivers 3 modes: • Select **Demo** mode for a walkthrough of the concept • Select **Practice** mode for hands on learning • Select the **Job Aid** for step-by-step documentation'. Below this, it says 'To begin training From the Table of Contents on the left, expand your role: • Employee • Manager • Administrator'. On the right side, a profile dropdown menu is open for 'Caitlin Blessing'. The menu includes 'Available Roles' (Manager, Employee, Client Administrator, HR Admin, Performance Admin) and 'Help', 'About', and 'Log out'. The 'Help' option is highlighted with a red box. The profile dropdown menu is also circled in red.

Use the Search feature to find information related to a topic.



Example: A search for “Goals” provides option to learn more about updating goals. Plus, explore other options to learn more about organizational vs personal goals.



## Navigating in Dayforce

There are three way to navigate between various modules.

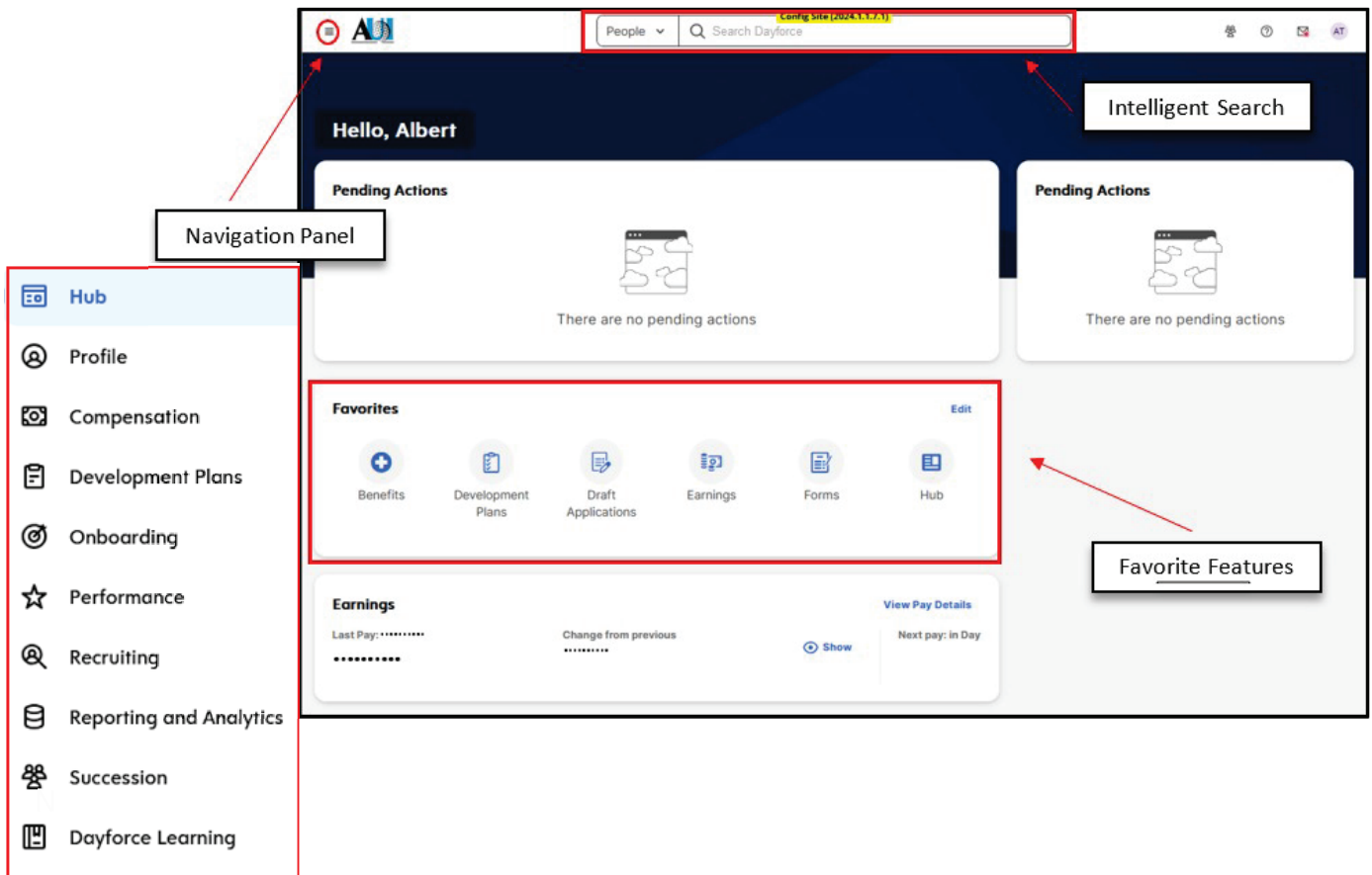
1. Intelligence Search – you can search for modules and for all active employees, learning basic information, and view them on the org chart via the intelligent search bar at the top of the home page.



2. Navigation Panel - The navigation panel displays all of the features to which you have access. The panel will display different options depending on your role. It's on the far left of the screen. The navigation panel is always available, regardless of which feature you're currently using.



3. Favorites – Edit your favorite for quick access to your most visited modules. You may display up to six favorites.



## Roles

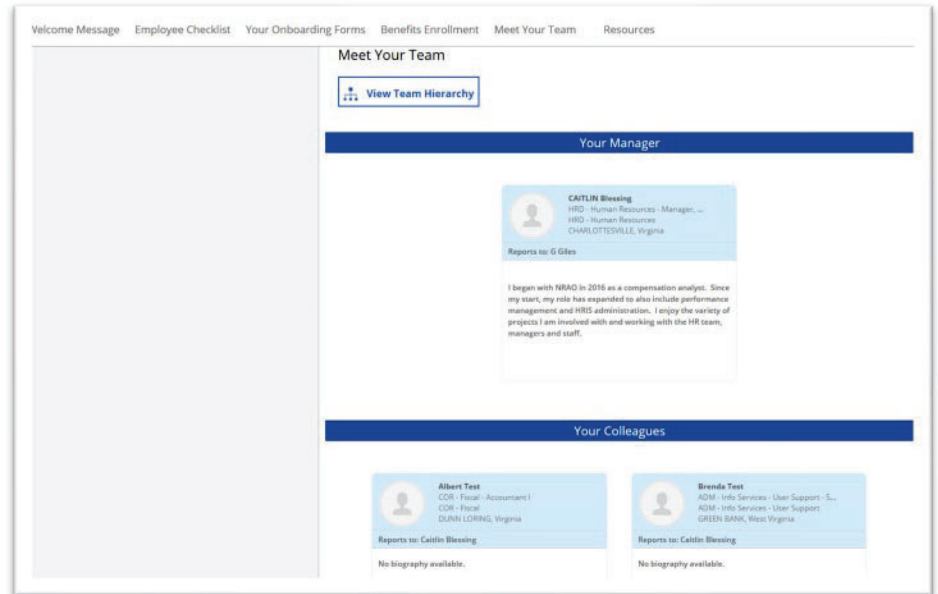
Managers have two roles: employee and manager. The manager role navigation panel offers more options such as recruiting, reporting and analytics and succession. Managers must switch to their Employee role to access self-service features and functionality (e.g. update contact information). Switch roles by clicking on your initials (or profile picture) in the top right.

**Note:** Although you have “Profile” listed under both roles, you are unable to edit your personal information in your Manager role.

**Task:** Update your biography in your Employee Role. You are limited to 512 characters. This detail pulls through to onboarding.

1. Change to Employee Role
2. From navigation plan, choose Profile
3. Check the edit pencil icon next to Biography.

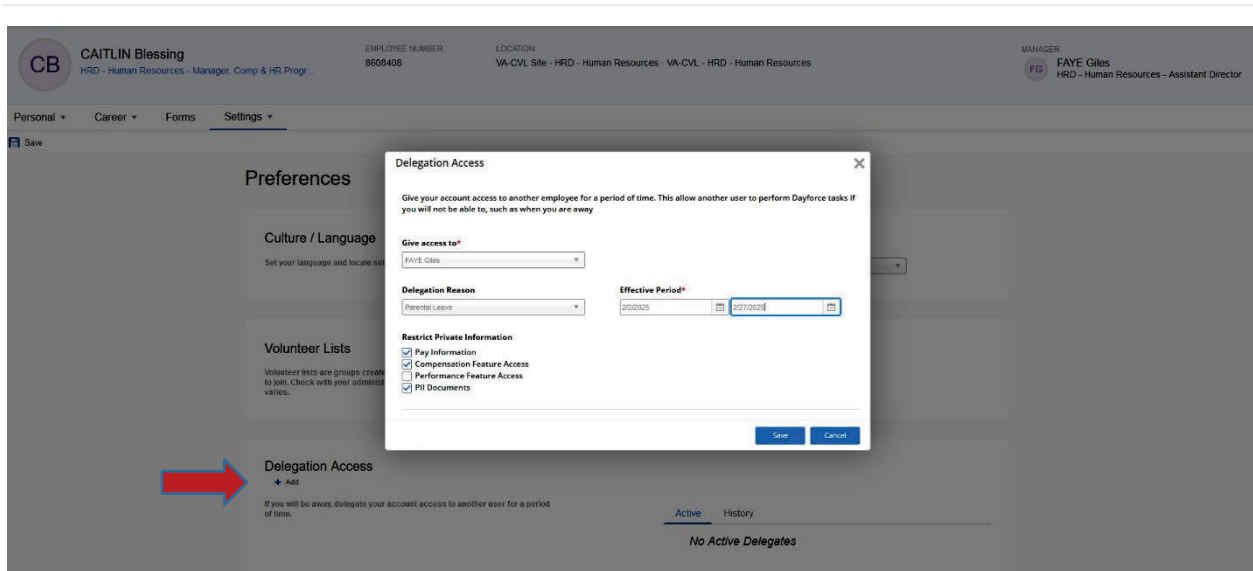
View in Onboarding –  
Your new hire will see  
your bio when  
completing their new  
hire paperwork.



## Access Delegation

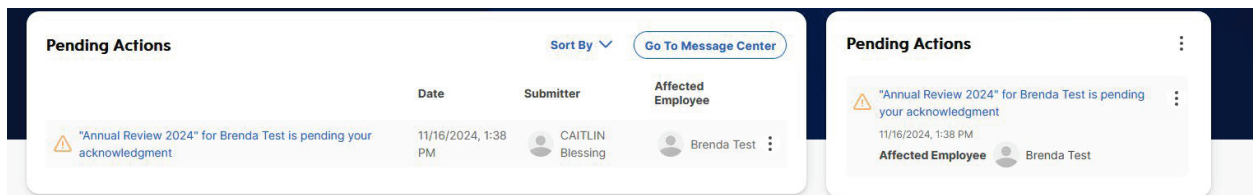
If you will be on extended leave, you can delegate your access to another manager for a period of time. This allows the delegated manager to approve forms that require a manager’s review.

1. Change to your Employee Role
2. From navigation plan, choose Profile
3. Click on Settings > Preferences
  - a. Click+ **Add**
  - b. Choose Manager to give access
  - c. Choose reason for delegation
  - d. Set the effective from – to period
  - e. Please a check next to the information you wish to restrict access to. Choose from:
    - i. Pay Information
    - ii. Compensation Feature Access
    - iii. Performance Feature Access
    - iv. PII Documents (Personal ID Info / Confidential)



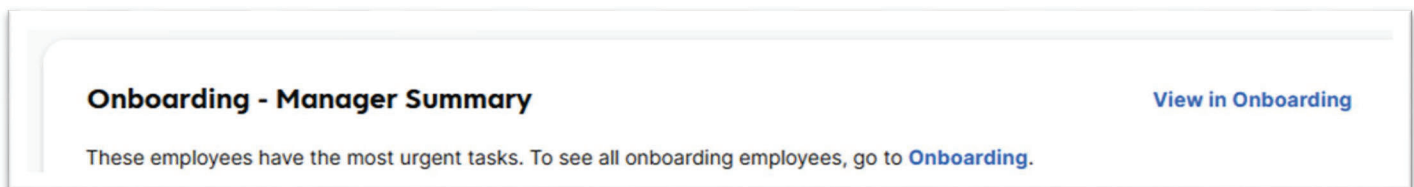
## Pending Actions

If you have an action waiting for you to review or approve, it will be listed in Pending Actions. Click the hyperlinked action to begin your review.



## Onboarding

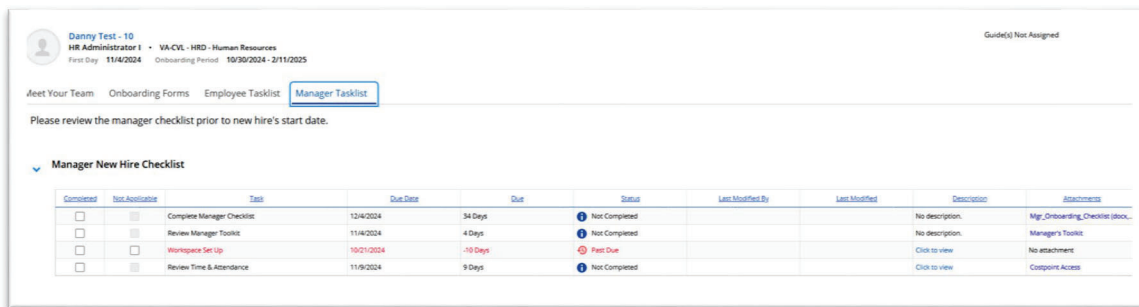
Once the new hire form has been completed in Dayforce, your new hire will appear in Dayforce in a “pre-start” status. New hires are assigned to onboarding to complete necessary paperwork, complete policy acknowledgement forms and complete required new hire trainings (cyber security and anti-harassment). Once onboarding starts, you will have an Onboarding tile on your Dayforce manager hub to alert you to required tasks and help you prepare for their start date.



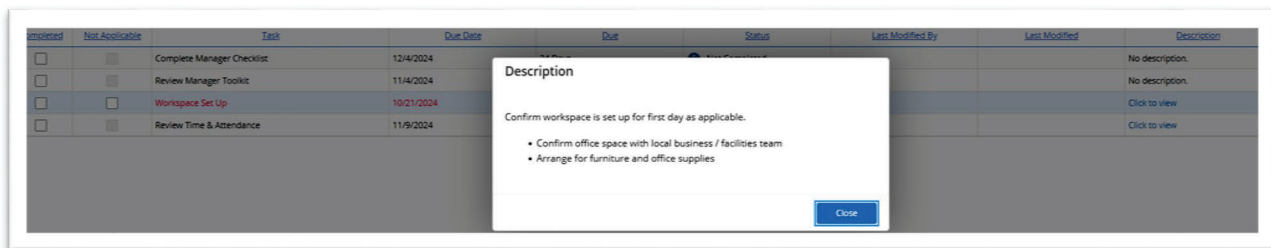
Four sections currently exist in Onboarding.

[Meet Your Team](#)   [Onboarding Forms](#)   [Employee Tasklist](#)   [Manager Tasklist](#)

1. Your Team – Preview of information your new hire will see in their onboarding page – includes information on manager, colleagues, and direct reports, if applicable.
2. Onboarding Forms - Managers can see the list of forms required of the new hire, the status of the form, and due dates. Managers are unable to see the content of the form or any information submitted on these forms. This information is useful to understand if your new hires is missing key forms required by HR to successfully complete their hire.
3. Employee Tasklist - Review employee tasks with due dates related to their start date to help ensure each ask is completed by the due date.
4. Manager Tasklist – Your required tasks in order of importance and due date such as to complete a computing request form, ensure a workspace is assigned, and set a onboarding schedule to help your new hire get acclimated. **Past due tasks will appear in red.**




Click View Details to view specific task to-dos.



5.

## Accessing your Team's Profiles

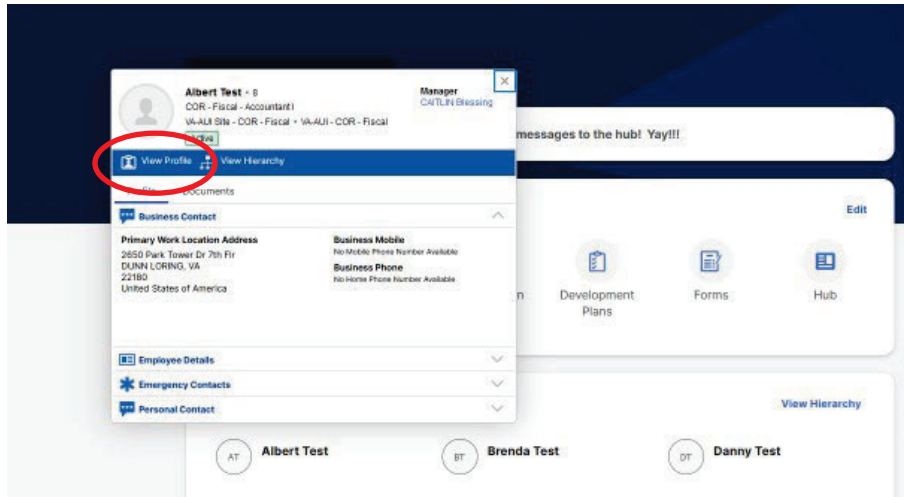
Dayforce offers two ways to access your team:

- 1) **My Team** in your Manager Hub and
- 2) the **People**  icon in the top right-hand corner of your screen.


### My Team

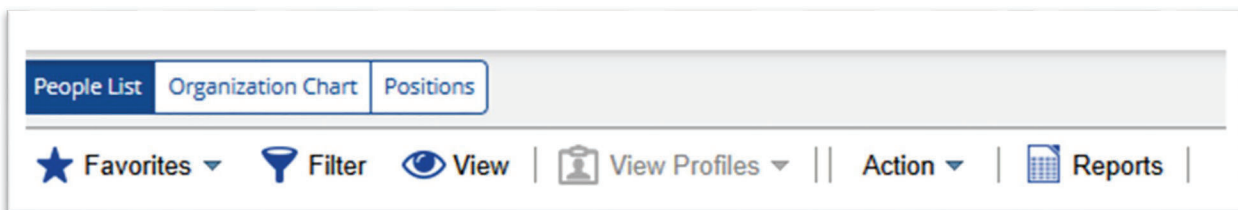
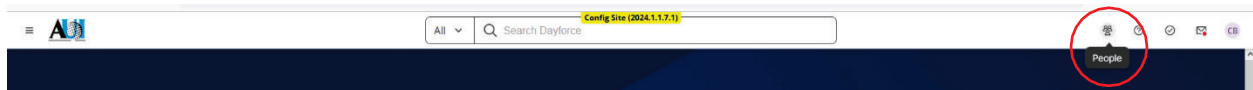
To view details of your team members, click on the name of the employee you wish to view under the My Team tile of your Manager Hub. The pop-up offers a quick view of business contact, employment details and emergency contacts. Please encourage your employees to ensure their contact information including emergency contact is always up-to-date.

From this pop-up, click View Profile to access the employee's full profile.



## People

Use the People  icon in the top right-hand corner of your screen to access your **People List**, **Organizational Chart**, and **Positions**.



Filters are available at the top of the People List. Use filter(s) to narrow your search as needed. Click on the name of the employee you wish to view the profile of.

The screenshot shows the filter interface for the People List. At the top, there are navigation icons for Favorites, Filter, View, View Profiles, Action, and Reports. Below these are several filter categories: (Status and Work) Job Assignment, (Status and Work) Location, (Personal) Name, (Personal) Number, and (Status and Work) Status. The 'Include Indirect Reports' checkbox is highlighted with a red box. A note box on the right states: "Note: If you have indirect reports, check the box 'Include Indirect Reports' to see all employees in your reporting chain." Below the filters is a table with columns for Name and a numerical value.

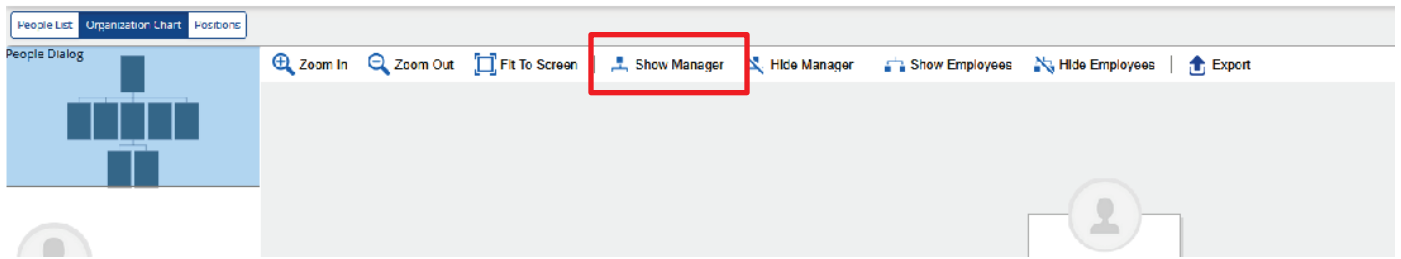
<input type="checkbox"/>	Name	
<input type="checkbox"/>	Albert Test	8
<input type="checkbox"/>	Brenda Test	7
<input type="checkbox"/>	Danny Test	10
<input type="checkbox"/>	Emily Test	3

#### Select Filter Options:

- Job: Job Title
- Job Assignment: Dept Code + Division + Work Group – Job Title
- Location: Location group start with state abbreviation + work side code + job assignment
- Manager: Group by manager
- Name: Search by common name, legal first name or last name.
- Number: Employee number
- Status: Can filter to include or exclude Active, Inactive (terminated) or Pre-start employees
- Business Unit: Department or Division as determined by Position Management
- Department: Dept Code + Division + Work Group
- Position: Position title as determined by Position Management

## Organization Chart

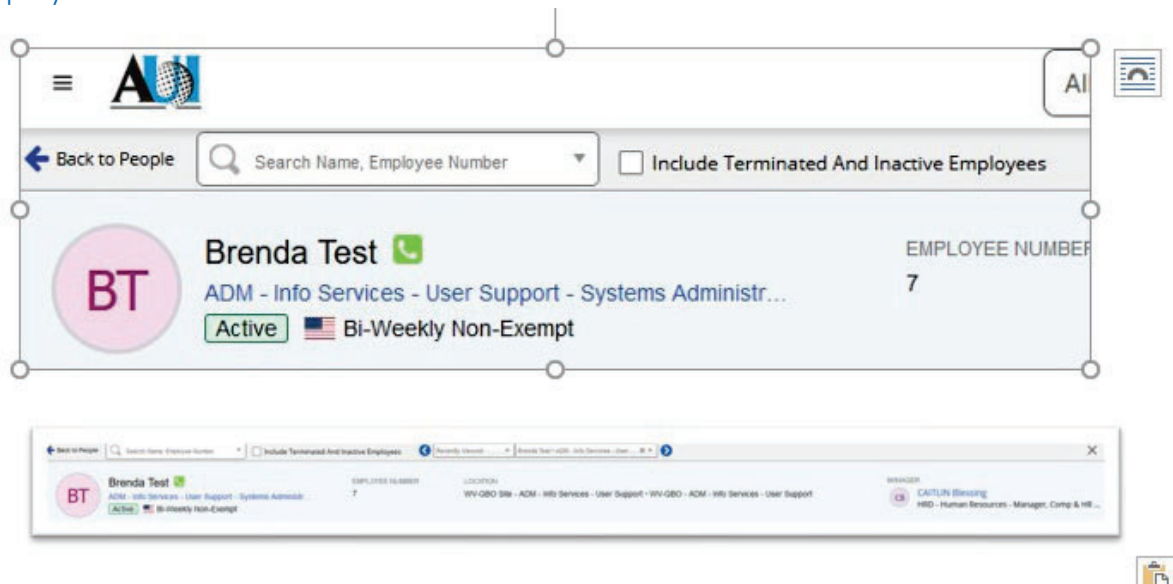
View the organization via the organization chart. Select Show Manager in the top tool bar to expand the organization hierarchy.



## Positions

Only positions within your hierarchy will be visible here. To begin recruitment, you must have either a vacant position or have processed a termination on an existing employee. Click on the position tile to see details of the position including job information (job assignment and location).

## Employee Profile Overview

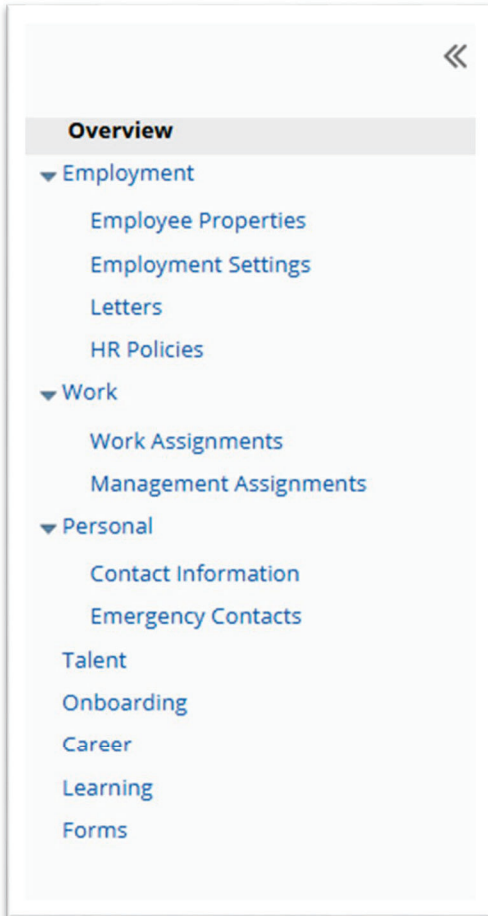


The employee profile header contains the following information:

- Employee profile picture: The profile picture is displayed on the left side of the header, if one has been uploaded. Otherwise, the employee's initials are displayed.
- Employee name: The employee's name displays as preferred name and legal last name.
- Personal > Contact information: Icons that you can click to expand the employee's email and phone number.
- Title: The employee's title pulls from their position details and should match their job title and job assignment.
- Location: The employee's primary work location and department / division.
- Status: The employee's current employment status (Active, Pre-start). Terminated employees can be found by checking Include Terminated and Inactive Employees box next to search feature.
- Employee number: The employee's unique employee number.

- 
- **Manager:** The profile picture, name, and title of the employee's manager. If you have access to the manager in Dayforce, their name is a link that you can click to expand their employee card.

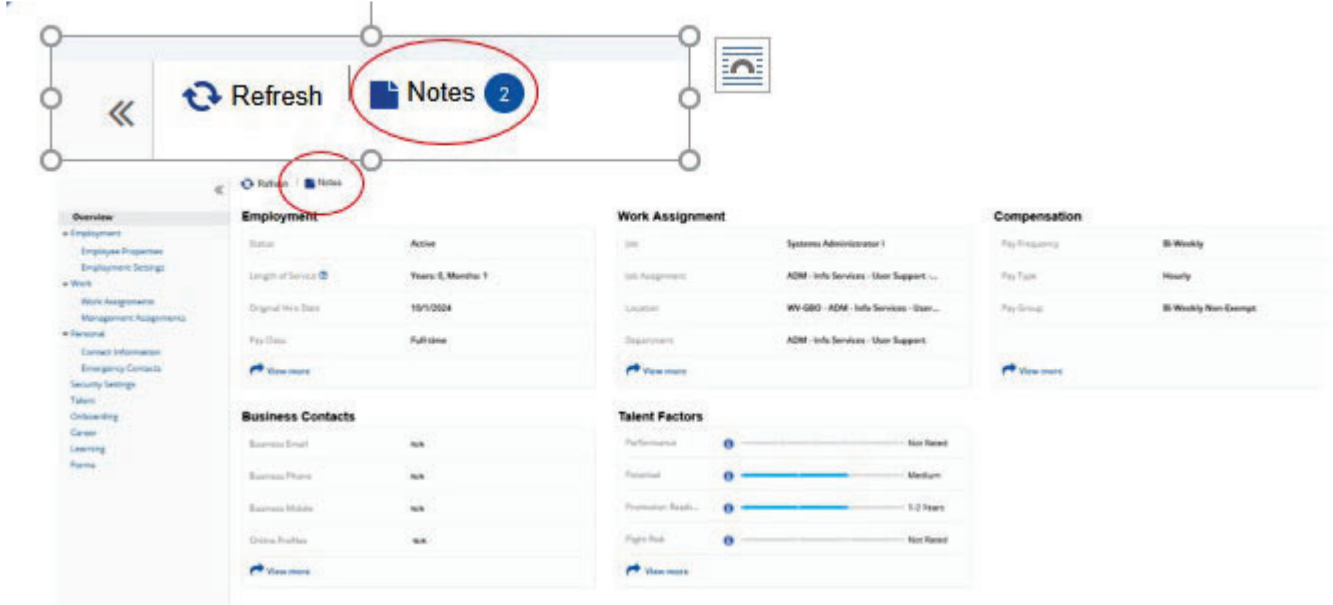
In each employee's profile, Managers have access to the following details, i.e., if access is granted. This list may change as features are enabled or display modifications are applied.



## Overview

Provides a quick view of several of the employee profile menu options (Employment, Work, Talent, etc.).

**Note:** Access to attachments added such as work from home agreements, reward letters, title or status change letters) for found under Notes.



## Employment

**Employee Properties:** Holds employee specific applicable information such as scientific appointment, term appointment end date, visa status, management supplement, etc.

**Employment Settings:** Details current and historical job and pay details. \*\*Dayforce went live in December 2024; historical pay and job details were imported into Dayforce from Jan 1, 2018 – December 5, 2024.

**Letters:** Records letters sent via Dayforce, such as offer letters.

**HR Policies:** Records date of acknowledgement of HR policy documents such as annual policy sign off and conflict of interest certification.

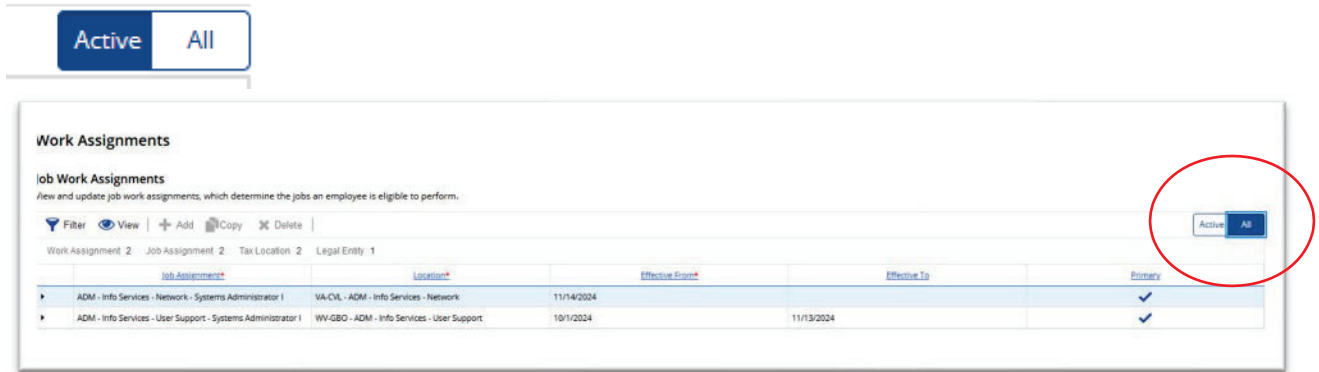
## Work > Work Assignments

**Position Assignments:** Details of the employee's most "Active" title/role/position will be listed.

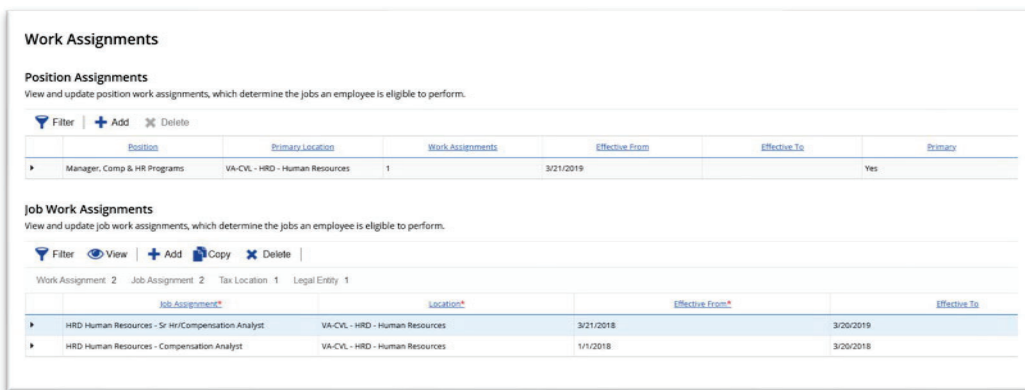
**Note:** Position management in Dayforce went into effective April 1, 2025. Employees in an active status on April 1, 2025 were added to a position with the reason code "initial position assignment". In the case of new hires, their work history will only be detailed under Position Assignment.

**Job Work Assignments:** Up to seven year of work assignment history was loaded into Dayforce. If your employee had a start date prior to January 1, 2018, the employee's work history will be detailed in Job Work Assignment beginning with a "effective from" date of 1/1/2018. Length of service can be found on the **Overview** screen.

Change **View** to see full assignment history. Toggle from Active to All to see history.



Click the arrow to expand the section to see additional details:



## Work > Management Assignment

In Management Assignment, you can view the current “Active” and past managers of the employee. Additionally, if the employee is a manager, you can view a list of the current “Active” employee they manage. Click All to see a list of all employees this employee has managed.

## Personal

**Contact Information:** View phone numbers, email address(es) and online profile information. If this information is not complete, please ensure your employee(s) complete these fields in their Dayforce Profile. If a phone number is marked as “unlisted” the employee has requested this phone number not be shared or distributed.

**Emergency Contacts:** Details name, relationship and contact information. If this information is not complete, please ensure your employee(s) complete(s) these fields in their Dayforce Profile.

## Talent

Talent Factors is directly linked to the Succession module in Dayforce.

Beginning with FY24 annual performance evaluations, performance ratings will be detailed on the employee’s performance timeline.

**Performance**  
Review the employee's performance details

Cycle Name*	Review Date*	Scale*	Rating*	Status	Source
Annual Review 2024	11/16/2024	Performance Rating Scale 2024	Meets Expectations	Pending Approval	Performance Review

## Career

Career is directly linked to both the Career page in the employee’s Profile. Up to seven years of work assignments (beginning 1/1/2018) + any details added by the employee on their personal Career page.

**Task:** Encourage your direct reports to complete their career profile by adding education, certification, etc.

## Dayforce Learning

**Courses/Events:** Managers can enroll employees in courses and events that are available.

**Learning Profile**  
Courses | Learning Plans | Skills | Certifications | Transcript

Name*	Type	Start Date*	Due Date	Completion Date	Credits	Score	Pass/Fail	Status	Cost
-------	------	-------------	----------	-----------------	---------	-------	-----------	--------	------

**Learning Plans:** View progress of employees enrolled in learning plans (i.e. New Hire required trainings).

**Learning Profile**  
Courses | Learning Plans | Skills | Certifications | Transcript

Name*	Type	Enrollment Date	Completion Date	Number of Courses	Progress	Cost
Test Learning Plan for onboarding new hires	Internal	10/23/2024		3	0 / 3	

Name	Type	Session	Enrollment Date	Start Date*	Due Date	Completion Date	Credits
Non-Discrimination & Anti-Harassment	E-Learning	N/A	10/15/2024	10/15/2024	11/14/2024		
Cyber Security	E-Learning	N/A	10/23/2024	10/23/2024			
New Employee Orientation	Classroom		10/23/2024				

**Certifications:** Managers can add Certifications for employees by clicking Add.

Save Refresh Problems

### Learning Profile

Courses Learning Plans Skills **Certifications** Transcript

★ Favorites Filter + Add X Delete Active All

Pending Changes 1 New

Certification*	Date First Issued	Date Last Issued	Expiration Date	Days Until Expiration	Last Assigned By	Status	Notes
					CAITLIN Blessing	Approved	

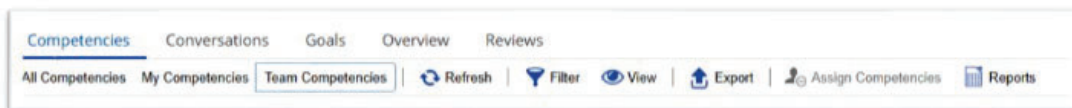
Dates Issued

+ Add X Delete

Issue Date*	Expiration Date	Certification Number	Assigned By	Status	Notes
11/17/2024			CAITLIN Blessing	Approved	

## Performance

To access Performance, use your navigation pane or search Dayforce bar. From this section you can view performance related sections for yourself and your team. Be sure to note where you are in the module to view ‘My’ or ‘Team’ information.



## Competencies

Non-employee employees will have competencies attached to them. These are the competencies used in the non-exempt six-month new hire review and the annual performance evaluation. If you see that competencies are not assigned for a non-exempt employee, please reach out to your local HR Rep.

### Non-exempt Competencies

1. **Attendance/Punctuality:** Regularly arrives on time and adheres to the established work schedule. Follows established protocol for requests for time off.
2. **Compliance:** Complies with Observatory policies, standards, procedures, and regulatory requirements. Consistently completed time reports accurately and on time.
3. **Initiative and Problem Solving:** Recognizes opportunities to take initiative and resolve problems. Starts tasks with little guidance and maintains consistent effort until completion. Looks for productive ways to make an impact and handles problems that arise promptly and professionally. Uses sound judgment about when to take action and when to seek guidance or permission
4. **Interpersonal Skills:** Shows genuine sensitivity to the needs, feelings and capabilities of other people. Deals with others in a pleasant manner. Treats others with respect and consideration

- 
5. **Job Knowledge:** Possesses the knowledge necessary to perform the assigned job. Takes responsibility for clarifying their job responsibilities, performance standards and communication expectations.
  6. **Organizational Skills:** Plans, coordinates and completes multiple assignments in a productive and timely manner. Sets priorities, allocates resources and anticipates future requirements. Ensures that all assignments get the proper amount of attention and attain the desired results.
  7. **Quality of Work:** Has established a track record of producing work that is highly accurate, demonstrates attention to detail and reflects well on the organization. Is personally committed to high quality work and encourages others to have similar standards.
  8. **Quantity of Work:** Produces an amount of work that meets or exceeds job expectations. Makes sure that quality does not suffer as the quantity of work increases. Works effectively with peers and carries own share of team workload.
  9. **Safety Awareness:** Makes sure to understand every safety practice expected by the organization. Takes no shortcuts that increase the risks of accidents, personal injuries or equipment failures. Looks for unsafe practices in the workplace and takes responsibility to ensure that others are aware of the potential impact.

## Conversations

Use conversations to details of conversation related to performance management. Conversation can be used to track progress on an assigned goal, gain clarity on goals activities, and documents feedback on goal achievement and competencies When starting a conversation, the conversation stream tag a specific category and determine who should have visibility.

### Category Options

- **Appreciation** - A “thank you” for a job well done, contributions, and/or above and beyond performance
- **Career Development** – Use for conversation about career or professional development goals and activities
- **Other** – Miscellaneous category use for conversation that do not fall within another category
- **Performance Feedback** – Use for feedback specific to a performance goal or competency
- **Personal Feedback** – Use for personal feedback
- **Questions** – Use for general questions not related to another category

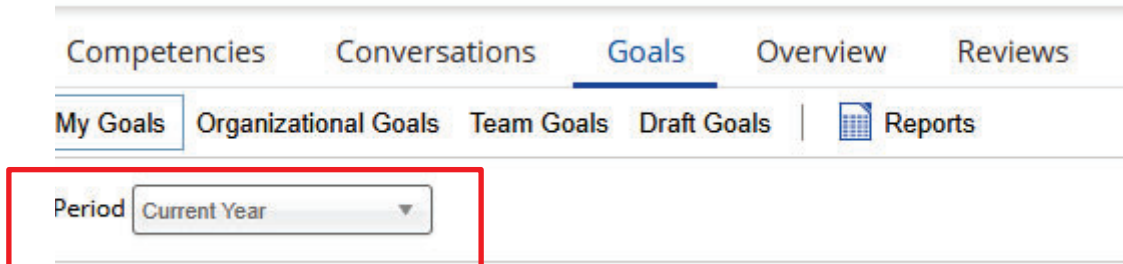
### Visibility Options: once visibility is set it cannot be changed

- **Tagged People + Their Direct Managers**
- **Tagged People Only**
- **Only Me**

## Goals

Performance Reviews are conducted in Dayforce. It is important that all employees have up-to-date performance goals into Dayforce each fiscal year. Performance goals pull into the annual review which launches on Oct 1 annually.

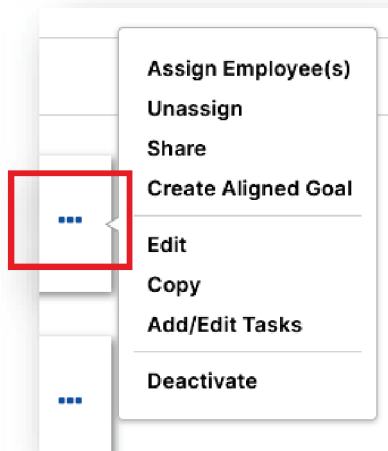
**Note:** Goals follow a calendar year for sorting by Period. Change the period if not seeing all goals.



As a manager, you may access your performance goals and the goals for your team. Use the Add button to begin drafting goals. You will be prompted to add “tasks” and assign goals to yourself and team members. You can save as draft and find draft goals under the Draft Goals tab.

**Note:** Organizational goals are created by your Human Resources Department. A key feature of organizational goals is that they are available to all users (both managers and employees) to review and align goals to from the Organizational Goals tab.

You and your employees may draft goals in their own performance page. Click the three blue dots ... to edit a goal. If you set a goal for an employee, they cannot edit the goal.



### Draft Goals


In the Draft Goals tab, you can work on goals that you haven't yet published for yourself or your employees (goals you've saved as a draft).

**Note:** When a goal is saved as a draft, other users can't see it.

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The application displays your draft goals in expandable panels that are similar to those in the other tabs. When you expand the panel, Dayforce displays any additional information that you've saved for the goal.

### Create a Goal:

1. Go to **Performance**
2. Click the **Goals** tab
3. Click on **My Goals** sub-tab.
4. Click on **Add Goal**. A blue rectangular button with a white plus sign and the text "Add Goal" in white.
5. In **Name**, type the name of the goal.
6. In **Description**, write out a description of the goal that answer the question of what is to be accomplished.
7. In the **Goal Category** list, choose the appropriate category.
8. In the Goal Area field, use the free text field to add tag group or categorize the goal.
9. In **Start Date** and **Due Date**, choose dates that correspond to the annual review period (Oct 1 – Sept 30). Start and due dates that fall within the annual review period will be pulled in the corresponding performance review.
10. In the Measure Type list, choose the appropriate measure type.
  - a. **Percentage**: Progress is measured by percentage. For example, the goal of "Complete XYZ System Training Manual" can have a percentage progress, so that the user can regularly update how close they are completing the document.
  - b. **Actual / Target**: Progress is measured by a numerical target. For example, the goal "Complete outreach to 5 local schools" could use this measurement method, and then users can match their actual performance against the numeric target.
  - c. **None**: Progress is measured using the **Not Started, In Progress, and Completed statuses**, but further detail is not recorded. For example, the goal "Complete my First Aid Certification" could have this measure type selected because users either pass the certification test or not; there is no detailed progress to measure.
11. Click **Next**
12. Add Tasks to a Goal as appropriate to details the activities required to complete the goal.

Note: You can click **Save as Draft** at any time to save your progress on the goal. When you do this, the goal is added to the **Draft Goals** tab, where it remains in an unpublished state. This means if you close the goal form before publishing the goal, it is available in the **Draft Goals** tab to work on, but not in any other tab.

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## Update Goal Progress

To update a goal's progress, do one of the following in the status section, depending on which measure type it has:

- **Percentage:** Move the slider to a different percentage or enter a percentage (including up to two decimal places) in the text box beside the slider. You can enter a percentage in the text box that exceeds 100% (for example, for when a user is over target). In this case, the maximum allowable amount you can enter is 999.99.
- **Actual/Target:** Move the slider to adjust the actual completed value or enter a specific actual completed value in the text box beside the slider.
- **None:** Select **Not Started**, **In Progress** or **Completed** from the **Status** drop-down list.


When you're finished updating the progress, click outside of the panel. Dayforce refreshes the goal panel with the new progress, and displays a new activity record when you click **Show Goal Updates** in the **Conversations** slide-out panel.

## Add and View Goal Conversations

In the **Performance > Goals** feature, you can engage in year-round conversations with your own manager/team surrounding the latest updates on goal progress. Conversations are displayed separately for each employee assigned to a goal. The conversations that Dayforce displays in the tabs of **Performance > Goals** are specific to the goal or employee that you select. See **Performance > Conversations Job Aide** for details.

### Add Conversations

To add a conversation post to a goal:


1. Go to **Performance > Goals**.
2. Click the conversations icon (  ) in the goal panel. The conversations slide-out panel opens and displays all conversation posts related to the goal, based on the visibility option selected when the post was created.
3. In the conversation text box, enter the message that you want to post. If necessary, you can click the bottom right of the text field, and drag it to increase the size of the text box.

Note: There is no limit to conversation length, and spell check is provided.

4. By default, the conversation is visible to your manager, anyone you tag, and their direct managers. To change this visibility, use the **Display to** drop-down list.
5. Select a conversation category in the **Category** drop-down list.
6. Click **Post** to add the conversation to the top of the conversation list, which is ordered reverse chronologically. Or, if necessary, click **Cancel** to delete the comment before posting it.

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## Edit Goals

There are several actions and edits that you can take for existing goals in Performance. In each tab, you access the list of available actions by clicking the action icon (  ) in the goal panel:

Depending on the tab that you're viewing the goal in, the following actions are available:

- **Edit** - You can edit an existing goal to modify its details.
- **Copy** - You can copy existing goals to create a goal with similar details.
- **Add/Edit Tasks** – You can add or edit tasks assigned to goals.
- **Deactivate/Activate** – Use to make goals that you no longer need inactive. When you deactivate a goal, it is removed from review forms that have not been locked, and which still have an incomplete manager review portion. If the review is already complete, the deactivated goal remains on the review form.
- **Delete** - You can only delete goals that you created. If other users are assigned to the goal, you can still delete it, but only if no one has added progress or conversations to the goal.

## View Goal Status

In the My Goals and Team Goals tabs, Dayforce displays the status for each goal using a colored bar on the left side of the expandable goal panel.

The color of the bar indicates the status of the goal as follows:

- Gray: Not Started. The goal is 0% completed.
- Green: Completed. The goal is 100% completed.
- Blue: In Progress. The goal is on track to be completed by the due date.
- Red: Overdue. The goal has passed the due date and isn't completed.
- Orange: At Risk. The goal progress is 10% or more behind the expected progress, calculated based on the due date.

## Monitor Goal Risk

When a goal has both a Start Date and Due Date defined in its details, Dayforce calculates the risk status for the goal. It then presents the risk status by color coding the progress bar in the progress columns.

Before You Begin: The risk calculation feature is only available for goals with both a start date and due date defined. Moreover, it's only available for goals with the Percentage and Actual /Target measure types; it isn't available for goals with the None measure type (that is, goals that don't measure progress). When risk calculation isn't available and a goal is in progress, its status will always be displayed as In Progress, with the blue progress bar.

Risk status is calculated by comparing the employee's actual progress (as set in the Progress scale) against their projected progress. Projected progress is a percentage determined by the number of

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days that have progressed from the starting date, divided by the total number of days available from the starting date to the end date. Based on this calculation, risk status is then set as follows:

- **At Risk:** If Dayforce calculates that the employee's actual progress percentage subtracted from the projected progress percentage is 10% or greater, then the progress bar is displayed in orange to indicate the project is considered at risk.
- **In Progress:** If Dayforce calculates that the actual progress percentage subtracted from the projected progress percentage is under 10% (or perhaps negative, to indicate that actual progress is ahead of plan), then the progress bar is displayed in blue to indicate the project is in progress.
- **Overdue:** If the goal is past the due date, and not 100% complete, then the progress bar is displayed in red. After a goal is 100% complete, however, the progress bar returns to blue.

As a simplified example of how Dayforce calculates whether a goal is at risk, consider the following scenario:

- A goal has a start date of May 1 and an end date of May 10. Therefore, the employee has 10 days to complete the goal.
- The current date is May 4 (the fourth day of the goal) and the employee's actual progress is 25%.

Given that the employee has 10 days to complete the goal, Dayforce calculates the projected progress as 10% each day. As such, the projected progress for the fourth day of the goal is 40%.

When Dayforce subtracts the employee's actual progress (25%) from the projected progress (40%), the resulting 15% is greater than the 10% threshold. Thus, the progress bar is orange (At Risk).

If the employee changes their progress to 31% on the current day, then the progress bar changes to blue (In Progress) because at 9% the actual progress is within 10% of the 40% projected progress.

## **Team Goals**

In the Team Goals tab, you can do the following:

- Focus solely on the goals of the employees that you manage, directly and indirectly
- View the total number of goals that are assigned to each employee
- View the status of the goals
- Align existing goals or create new aligned goals
- Assign employees to, or unassign employees from, goals
- View unassigned team goals

You can set how you view goals in this tab using the Group By drop-down list. Select Employees to group goals by employee, or select Goals to group them by goal.

**Note:** If your Group By selection isn't the default setting, Dayforce reverts to the default when you log out.

## Group By Employees

When you select **Employees** in the **Group By** drop-down list, Dayforce displays each employee's name on an individual row. If the employee is assigned one or more goals, this row also includes a count of goals in each status, as well as the total number of assigned goals. In addition, Dayforce displays an arrow next to the employee's name, and when you click the arrow, the application expands the row to display the employee's assigned goals:

Employee	Not started	In Progress	At Risk	Overdue	Completed	Total
Christine Caccia Copy Editor	0	0	0	0	1	1
Erin Walsh Editor In Chief	0	1	1	0	0	2

Expanded Goal 1: Increase Employee Engagement Index by 10% (At Risk, 0% progress)

Expanded Goal 2: Achieve \$12,000,000 in Sales (In Progress)

**Note:** You cannot view unassigned goals from the Group By Employees view.

The goals are displayed in the same expandable panels as in the other tabs. When collapsed, the goal panel displays the effective period of the goal, status, conversation icon, and the number of aligned goals (if applicable). When you expand the panel, Dayforce displays additional information for the goal.

**Note:** The goal counts and the arrow next to the employee's name are only displayed if the employee has assigned goals.


## Group By Goals

When you select **Goals** in the **Group By** drop-down list, Dayforce displays each goal in an expandable panel. When the panel is collapsed, Dayforce displays the status counts for the goal, the number of employees assigned to the goal (if applicable), the number of aligned child goals (if applicable), and the effective period of the goal.

When you expand the panel, Dayforce displays additional information for the goal including the goal category, goal creator, and if the goal is an organizational one. You can also align the goal with other goals from this expanded view.

In goals view, when you click the action icon (⋮) there are fewer options available than when you're in the group by employees view. The available actions are:

- 
- Assign Employee(s)
  - Share
  - Create Aligned Goal
  - Edit
  - Copy
  - Add/Edit Tasks
  - Deactivate

Click the assigned employees icon (  ) to open a slide-out panel where you can manage employee assignments, add progress, and add comments.

The name of the manager that you selected in the main **Team Goals** tab is reflected in the slide-out panel view so that you see a list of that manager's reports. If you selected **My Direct Reports** in the main tab, your name is selected in the **Team** drop-down list in the slide-out panel. You can only change this selection from the main tab, not from the slide-out panel. You can also choose to view either direct and indirect reports or just direct reports of the selected manager in the slide-out panel using the **Directs** and **Directs and Indirects** options.

You can also select **Unassigned** in the **Team** drop-down list to view only those team goals that have yet to be assigned to anyone.

Note: The count of employees next to the assigned employees icon for a goal in this view only includes the direct reports of the manager selected in the **Team** drop-down list.

To learn more about adding and maintaining goals go to - Job Aide – Performance Goals