

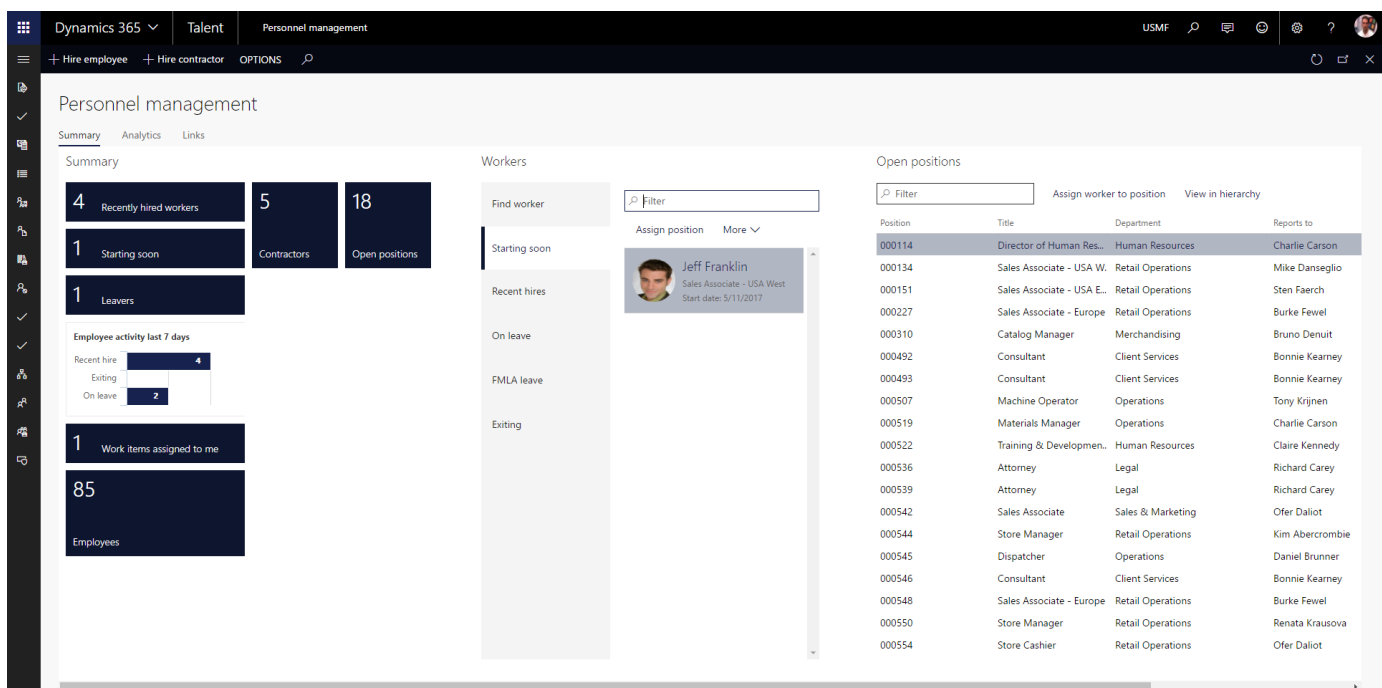
MICROSOFT DYNAMICS 365 HUMAN RESOURCES

Microsoft Dynamics 365 Human Resources provides a full-featured solution with core human resources capabilities. Human Resources automates and helps you manage many administrative activities for your workforce whether they're full-time employees and contractors. It also includes the ability to match your employees to the jobs that optimize their interests and talents by defining and mapping skills, competencies, education and development. Employees can identify career opportunities that can help them fulfill their potential and goals. Compensation and benefits management helps your company reward and retain employees that are vital to its success.

Personnel Management

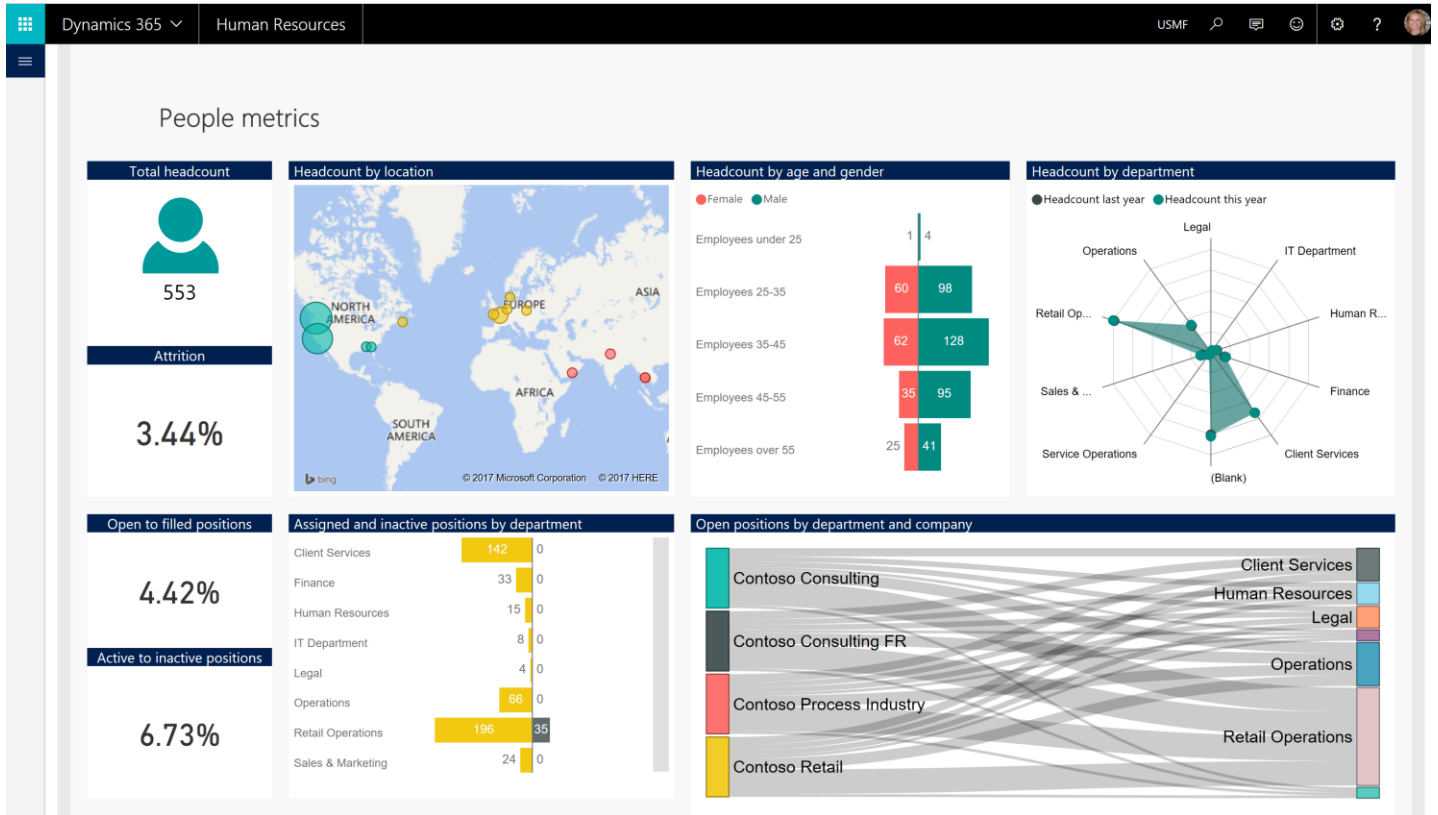
Organizations collect and maintain information that helps them meet regulatory requirements, helps employees develop their careers, and contributes to the equity and efficiency in carrying out daily routines. Human Resources helps you manage basic employee information such as contact information, demographics, identification, military service status, expatriate, and personal and emergency contacts. You can also track information about employees' employment, such as company or organization affiliation, start and end dates, terms of employment, pension, vacation, and relocation information.

Human Resources lets employees maintain their own data, reducing the time and effort that human resources staff needs to spend on routine activities and freeing up time to focus on more strategic initiatives. Intuitive, self-service pages let employees update personal information, including certifications, as needed, and helps them monitor progress on goals and prepare for upcoming performance reviews. You can implement approval workflows that keep everyone informed as changes are made. As a complete solution, Microsoft Dynamics 365 Human Resources also maintains data and generates reports that can help you meet regulatory requirements.



The screenshot displays the 'Personnel management' dashboard in Microsoft Dynamics 365. The interface is divided into several sections:

- Summary:** A grid of cards showing key metrics: 4 Recently hired workers, 5 Contractors, 18 Open positions, 1 Starting soon, 1 Leavers, and 1 Work items assigned to me. Below these is a bar chart for 'Employee activity last 7 days' showing recent hire, exiting, and on leave counts.
- Workers:** A section for finding and managing workers, including filters for 'Starting soon', 'Recent hires', 'On leave', 'FMLA leave', and 'Exiting'. A profile card for Jeff Franklin is visible.
- Open positions:** A table listing available positions with columns for Position, Title, Department, and Reports to. The table includes 18 entries, such as 'Director of Human Resources' and various 'Sales Associate' roles.

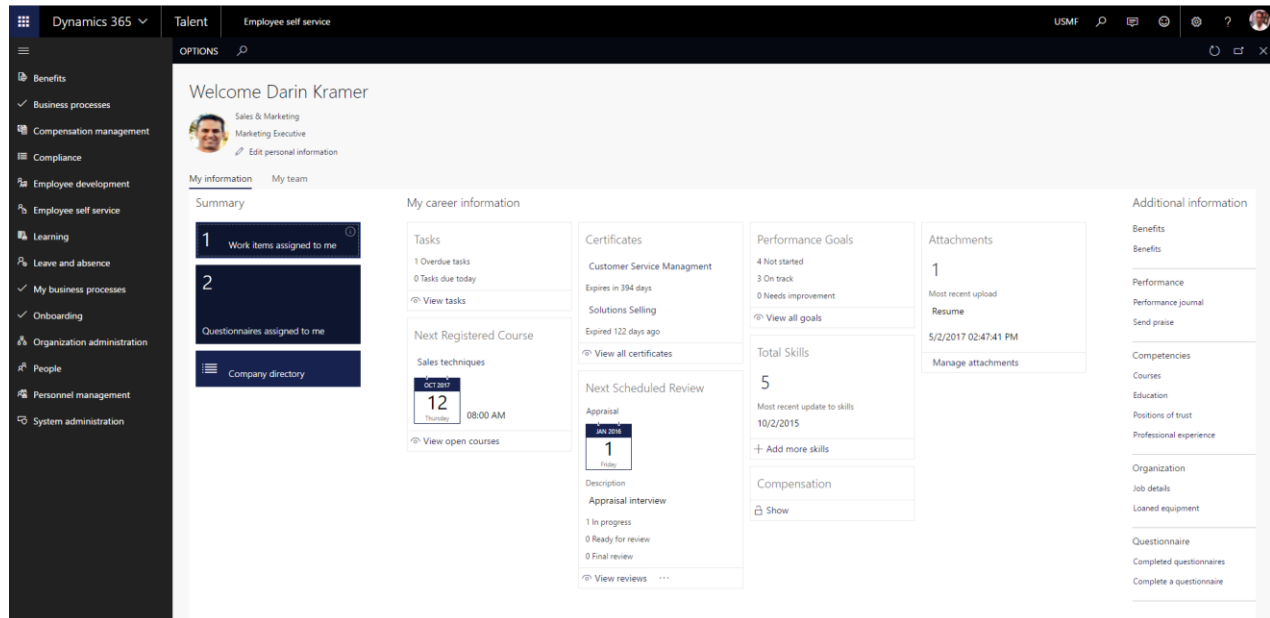


Personnel Management in Microsoft Dynamics 365 Human Resource lets you:

1. Browse and search for employees in the organization
2. Verify employment for current and past employees
3. Hire new employees and initiate the onboarding process
4. Promote employees
5. Manage employee separation and termination and initiate off-boarding process
6. Reassign employees to new positions and fill open positions
7. See reporting relationships based on position for any employee in the organization
8. View new employees, joining employees and exiting employees
9. Work with employees on leave
10. Approve any requests that have been submitted through workflow
11. Gain insights on people metrics through a comprehensive analytics dashboard

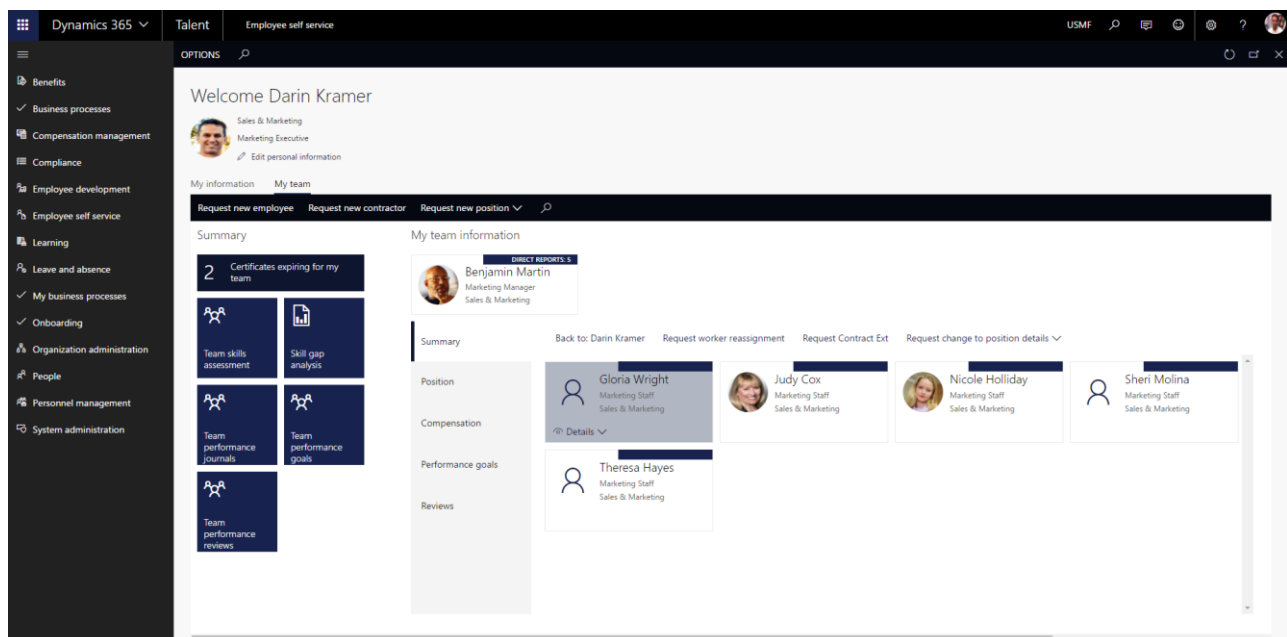
Employee and manager self service

Microsoft Dynamics 365 Human Resources offers a single spot for employees to view and update their personal information, as well as see upcoming courses and reviews. Employees can also view any items that have been assigned to them and review their compensation. Managers can also view their organizations from a single workspace, including summaries of their team and they can find information related to the positions, compensation, and performance goals for not only their direct reports, but skip-level reports as well.



The screenshot shows the 'Employee self service' interface for Darin Kramer, a Marketing Executive in Sales & Marketing. The interface is divided into several sections:

- My information:** Includes a summary of work items assigned to the user (1 overdue, 2 questionnaires) and a company directory link.
- My career information:** Displays tasks (1 overdue, 0 due today), a next registered course (Sales techniques) starting on Oct 12, and a next scheduled review (Appraisal interview) on Jan 1.
- Certificates:** Lists certificates such as Customer Service Management and Solutions Selling, with expiration dates and links to view all certificates.
- Performance Goals:** Shows 4 goals (3 on track, 1 needs improvement) and a total skills score of 5.
- Attachments:** Lists recent uploads like a resume and a performance journal.
- Additional information:** A sidebar containing links to various HR-related topics like Benefits, Performance, Competencies, and Organization.



The screenshot shows the 'Employee self service' interface for Benjamin Martin, a Marketing Manager in Sales & Marketing. The interface is divided into several sections:

- Summary:** Includes links to request new employees, contractors, or positions, and a summary of certificates expiring for the team (2).
- My team information:** Displays a list of team members with their names, photos, and positions. The list includes Benjamin Martin (Marketing Manager), Gloria Wright (Marketing Staff), Judy Cox (Marketing Staff), Nicole Holliday (Marketing Staff), and Sheri Molina (Marketing Staff).
- Team performance:** Provides links to view team skills assessment, skill gap analysis, team performance journals, and team performance goals.
- Team performance reviews:** A section for viewing and managing team performance reviews.

Employee self-service lets you:

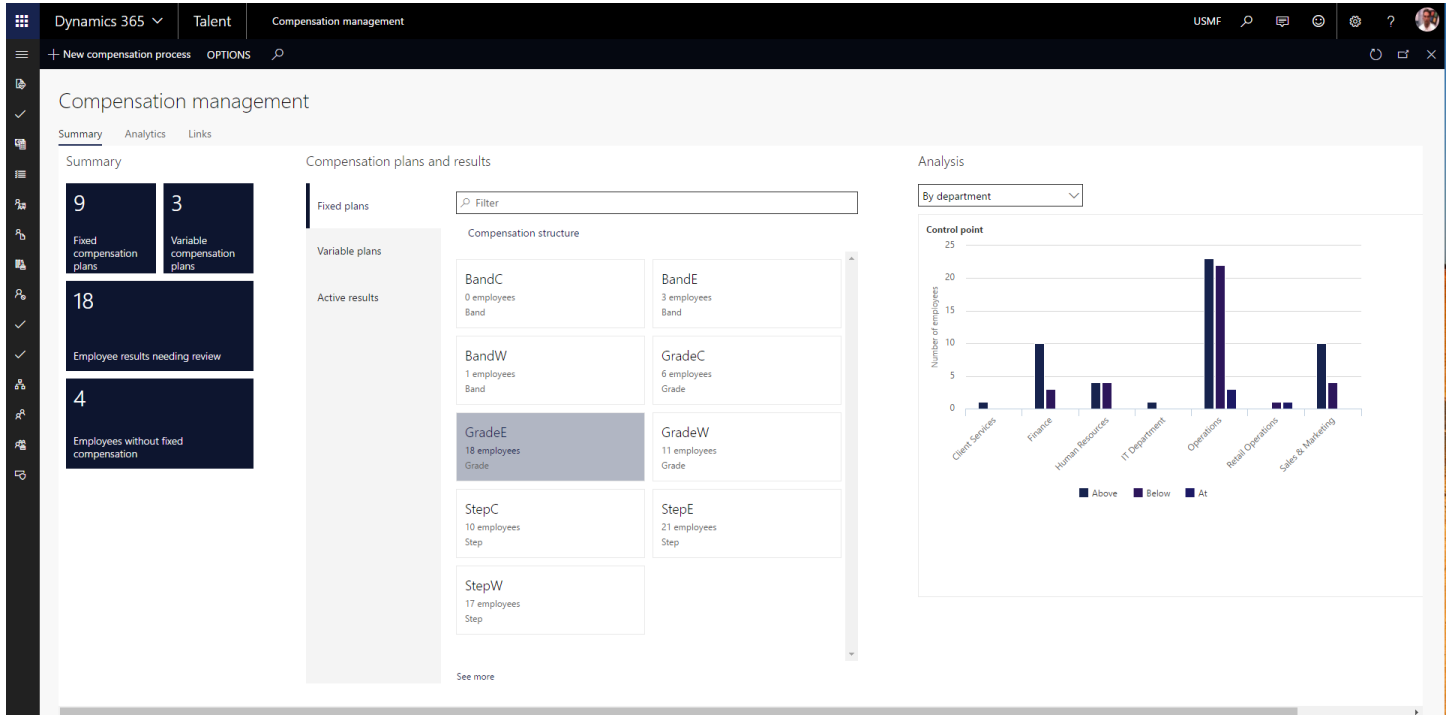
1. Update your personal information such as emergency contacts, image, address, phone numbers
2. Register for new training classes and view any upcoming training classes you may have registered for
3. See any expiring certificates
4. Track and update performance goals
5. View compensation and drill into compensation history
6. Schedule reviews or view any upcoming reviews
7. View currently enrolled benefits
8. Send praise to co-worker

Manager self-service lets you:

1. View information related to your direct reports and skip-level reports such as:
 - a. Current compensation
 - b. Performance goals
 - c. Years of service
 - d. Seniority or anniversary date
 - e. Birthday
 - f. Performance goals
 - g. Registered training courses
2. Take actions such as:
 - a. Request a new employee
 - b. Request a new position
 - c. Request a worker reassignment
 - d. Request a termination
 - e. Request a change to position details
3. Perform a team skill assessment
4. Understand where skill gaps may exist on your team

Compensation management

Use Microsoft Dynamics 365 Human Resources to help you manage standard compensation activities, including defining fixed and variable compensation plans, and spot, cyclical, short-term, or annual bonuses. You can also manage long-term incentives, such as cash awards, stock awards, and stock options.



Compensation management lets you:

1. Create fixed compensation plans of step, grade and band
2. Create variable compensation plans to manage such things as bonuses and stock options
3. Calculate fixed and variable compensation amounts based on factors including performance, region, and budget increases
4. Perform what if compensation scenarios before committing to employees

Employee benefits

Create and manage employee benefits using Microsoft Dynamics 365 Human Resources's benefit management capabilities. Employees can be enrolled in benefits based on eligibility requirement determined by benefits eligibility policies and rules that each organization defines to meet its own needs.

Dynamics 365 Talent

+ New benefit + New benefit element OPTIONS

Benefit management

Summary Analytics Links

Summary

5 Benefits with no enrollments

0 Benefits expiring this year

0 Benefits with eligibility overrides

32 Benefits

Filter

Plan	Option	Workers enrolled	Frequency	Basis	Employer cost	% change	Frequency	Basis
401k	Participate	54	All	Percent of earnings	0.0000	—	All	Percent of earnings
Cell phone	Participate	3			0.0000	↻		
Company car	Participate	2			0.0000	↻		
Dental	Sub	35	f2om	Fixed amount	100.0000	—	f2om	Fixed amount
Dental	SubFam	28	f2om	Fixed amount	225.0000	—	f2om	Fixed amount
Dental	SubSp	13	f2om	Fixed amount	130.0000	—	f2om	Fixed amount
Dental	Waive	5	All	Fixed amount	0.0000	—	All	Fixed amount
Dep care spending	Participate	3	All	Percent of earnings	0.0000	—	All	Fixed amount
FamSO	Participate	1	All	Fixed amount	0.0000	—	All	Fixed amount
FedTaxLevy	Participate	1	All	Fixed amount	0.0000	—	All	Fixed amount
GenLiab	Participate	0	All	Regular earnings	0.0321	—	All	Percent of earnings
Medical HMO	Sub	14	f2om	Fixed amount	256.2500	—	f2om	Fixed amount
Medical HMO	SubFam	13	f2om	Fixed amount	437.5000	—	f2om	Fixed amount
Medical HMO	SubSp	6	f2om	Fixed amount	337.5000	—	f2om	Fixed amount
Medical HMO	Waive	2	All	Fixed amount	0.0000	—	All	Fixed amount
Medical PPO	Sub	22	f2om	Fixed amount	205.0000	—	f2om	Fixed amount
Medical PPO	SubFam	15	f2om	Fixed amount	350.0000	—	f2om	Fixed amount
Medical PPO	SubSp	8	f2om	Fixed amount	270.0000	—	f2om	Fixed amount
Medical PPO	Waive	1	All	Fixed amount	0.0000	—	All	Fixed amount

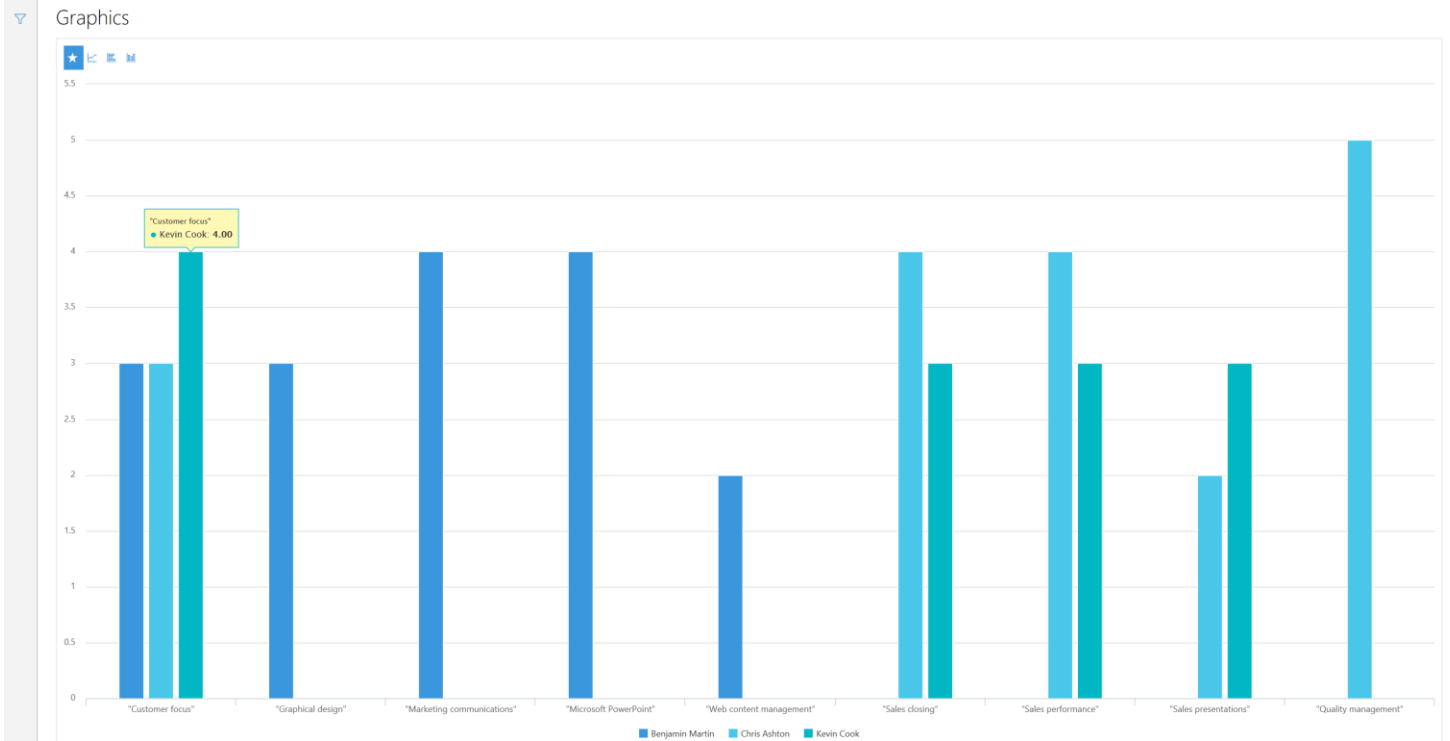
See more

Benefit management lets you:

1. Define all the employee benefits offered by your organization
2. Create robust eligibility rules allowing organizations to easily control what benefits employees are eligible for
3. Track costs related to benefits and override at employee level
4. Grandfather employees into plans for which they may not meet eligibility requirements
5. Mass enroll employees into new benefits
6. Roll down future rate changes to employees enrolled in a benefit
7. Analyze employer and employee costs year over year

Competencies and development

You can use competencies in Microsoft Dynamics 365 Human Resources to compare the skills, knowledge, or abilities defined on a job with the skills, knowledge, and abilities that workers have already obtained. You can track certificates that an employee has earned, tests that an employee has taken, and education the employee has completed. Managers can also examine current and future strategic needs to help their employees shape their own objectives, and then identify the training needed to develop the required competencies.



Results

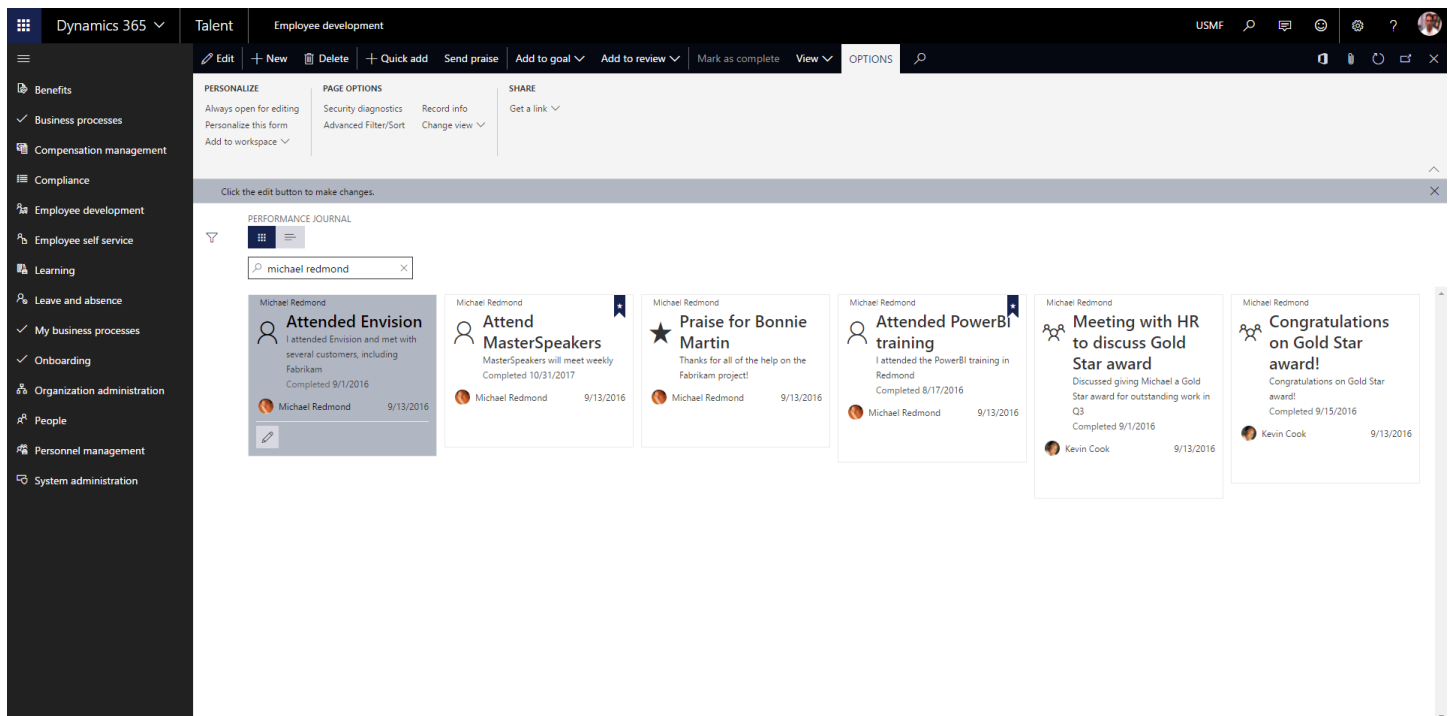
Name	Worker	Contact	ZIP/postal code	Seniority	Age	Points	Percentage of...
Aaren Ekelund	✓		94115	7	38	10	66.67
Chris Ashton	✓		98107	7	47	9	60.00
Kevin Cook	✓		98107	9	50	9	60.00
Aaron Painter	✓		94115	5	40	8	53.33
David Ahs	✓		98007	6	38	7	46.67
Benjamin Martin	✓	✓	98122	9	42	5	33.33
Julia Funderburk	✓		98033	9	55	5	33.33
Alexander Eggerer	✓		94115	8	31	4	26.67
Kim Akers	✓		98007	8	31	4	26.67
Rick Byham	✓			5	53	4	26.67
Roxanne Kenison	✓			8	61	4	26.67
Adrian Lannin	✓		94115	10	36	3	20.00
Lisa Toftemark	✓		98115	10	31	3	20.00
Michael Redmond	✓		98033	5	25	3	20.00
Adina Hagege	✓		94115	6	56	2	13.33
Alex Darrow	✓		94119	10	40	2	13.33
Alfonz Staerk	✓		98007	7	36	2	13.33
Alice Ciccu	✓		98117	6	26	2	13.33
Bonnie Kearney	✓		98107	6	26	2	13.33
Bruno Denuit	✓		94118	6	35	2	13.33
Daniel Brunner	✓		98122	9	45	2	13.33
Diane Glimp	✓		98007	6	52	2	13.33
Karen Berg	✓		98007	7	46	2	13.33

Competencies and development functionality in D365 HR lets you:

1. Track skills of jobs and employees
2. Analyze the skill gaps of your employees compared to a particular in your organization
3. Learn about the skills your employee possesses
4. Perform skill mapping to make staffing decisions and promote career development that anticipates and prepares for upcoming needs

Employee performance

Microsoft Dynamics 365 Human Resources offers a flexible framework for defining the performance management process. Performance can be a structured process with signoff process and defined rating models or a continuous discussion between managers and employees. Employees can track their activities in a performance journal that collects the information needed for productive, collaborative reviews and goal setting discussions with their manager.

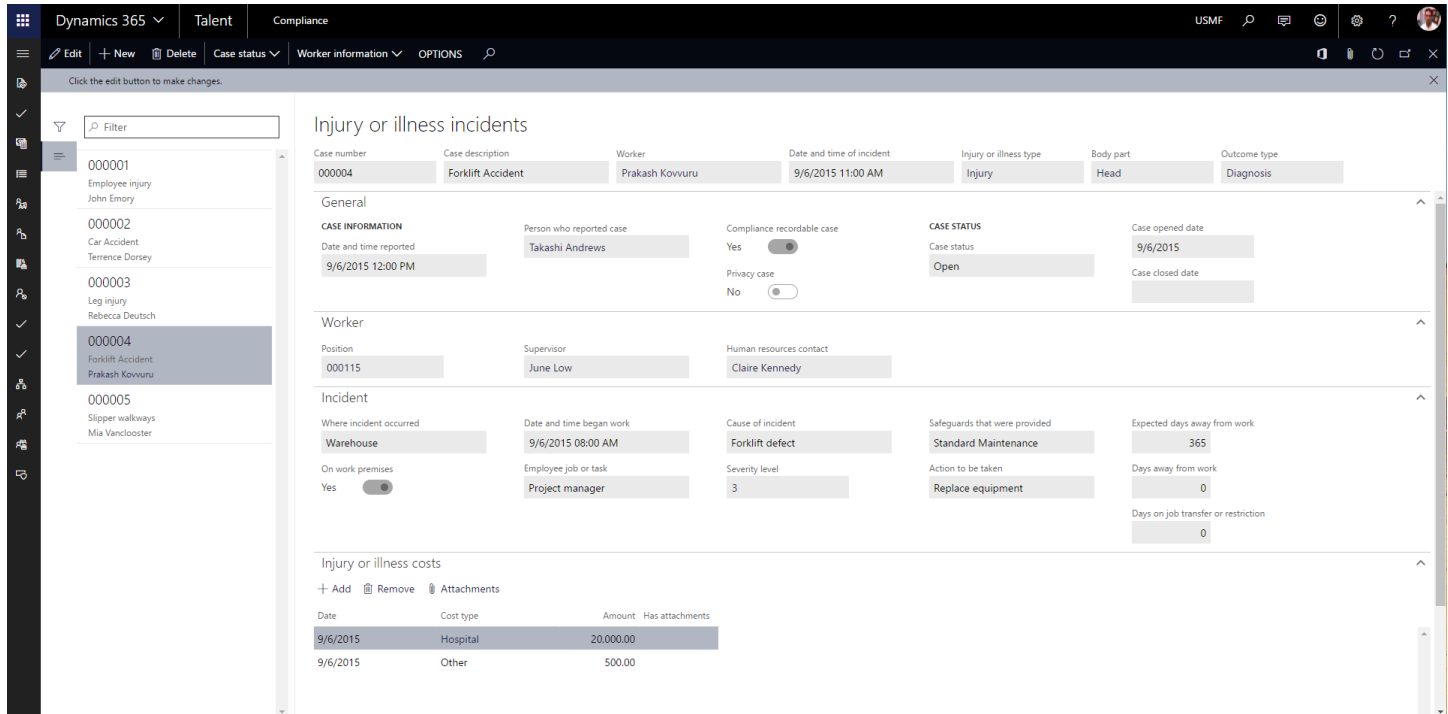


Performance management lets you:

1. Define flexible review periods and performance measures
2. Define reviews and the structure of the review process
3. Send praise to employees and share with managers
4. Manage performance journal content for use in goals and reviews
5. Create and actively collaborate on goals

Health and Safety (injury and illness)

Track health and safety related occurrences using Microsoft Dynamics 365 Human Resources's incident tracking system. Cases can be opened and tracked for compliance with government regulations.



The screenshot shows the 'Injury or illness incidents' form in Microsoft Dynamics 365 Human Resources. The interface includes a left-hand navigation pane with a list of incidents, a main form area with tabs for General, Case Information, Worker, Incident, and Injury or illness costs, and a right-hand pane for case details.

Incident List (Left Pane):

- 000001: Employee injury, John Emory
- 000002: Car Accident, Terrence Dorsey
- 000003: Leg injury, Rebecca Deutsch
- 000004: Forklift Accident, Prakash Kovvuru (Selected)
- 000005: Slipper walkways, Mia Vanclooster

Incident Details (Main Form):

- General:** Case number 000004, Case description Forklift Accident, Worker Prakash Kovvuru, Date and time of incident 9/6/2015 11:00 AM, Injury or illness type Injury, Body part Head, Outcome type Diagnosis.
- Case Information:** Date and time reported 9/6/2015 12:00 PM, Person who reported case Takashi Andrews, Compliance recordable case Yes, Privacy case No, Case status Open, Case opened date 9/6/2015, Case closed date.
- Worker:** Position 000115, Supervisor June Low, Human resources contact Claire Kennedy.
- Incident:** Where incident occurred Warehouse, Date and time began work 9/6/2015 08:00 AM, Cause of incident Forklift defect, Safeguards that were provided Standard Maintenance, Expected days away from work 365, On work premises Yes, Employee job or task Project manager, Severity level 3, Action to be taken Replace equipment, Days away from work 0, Days on job transfer or restriction 0.
- Injury or illness costs:**

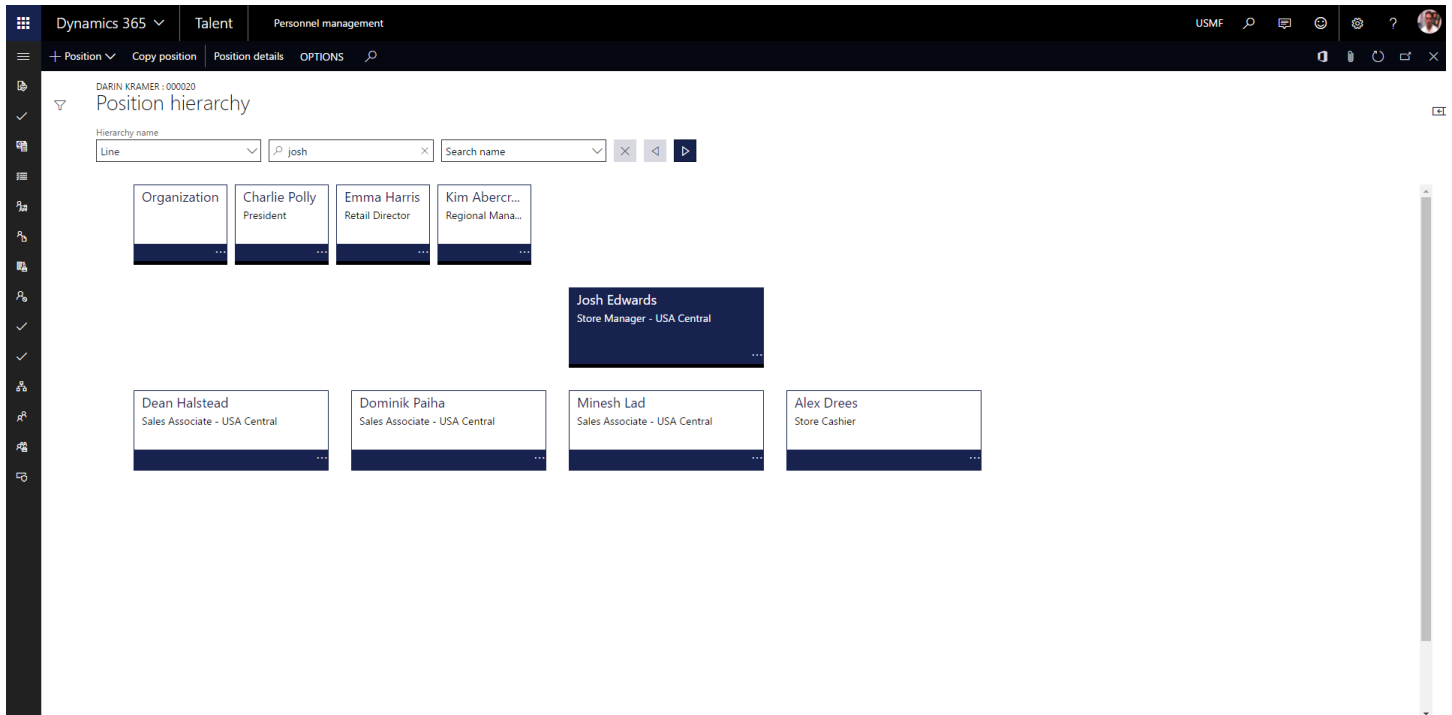
Date	Cost type	Amount	Has attachments
9/6/2015	Hospital	20,000.00	
9/6/2015	Other	500.00	

Health and safety in D365 Human Resource lets you:

1. Record safety cases through injury and illness tracking
2. Record activities related to the incident
3. Track costs and extent of injuries.
4. Gain insight into incidents using reports and analytics

Organization Management

Manage and create relationships and hierarchies for employees and contractors using Microsoft Dynamics 365 Human Resources' position hierarchies. These hierarchies can be based on managerial lines, project, matrix or any other configuration defined in the organization. Use effective dating to manage changes in the organization. These hierarchies can also be used throughout the application for approval routing in workflow.

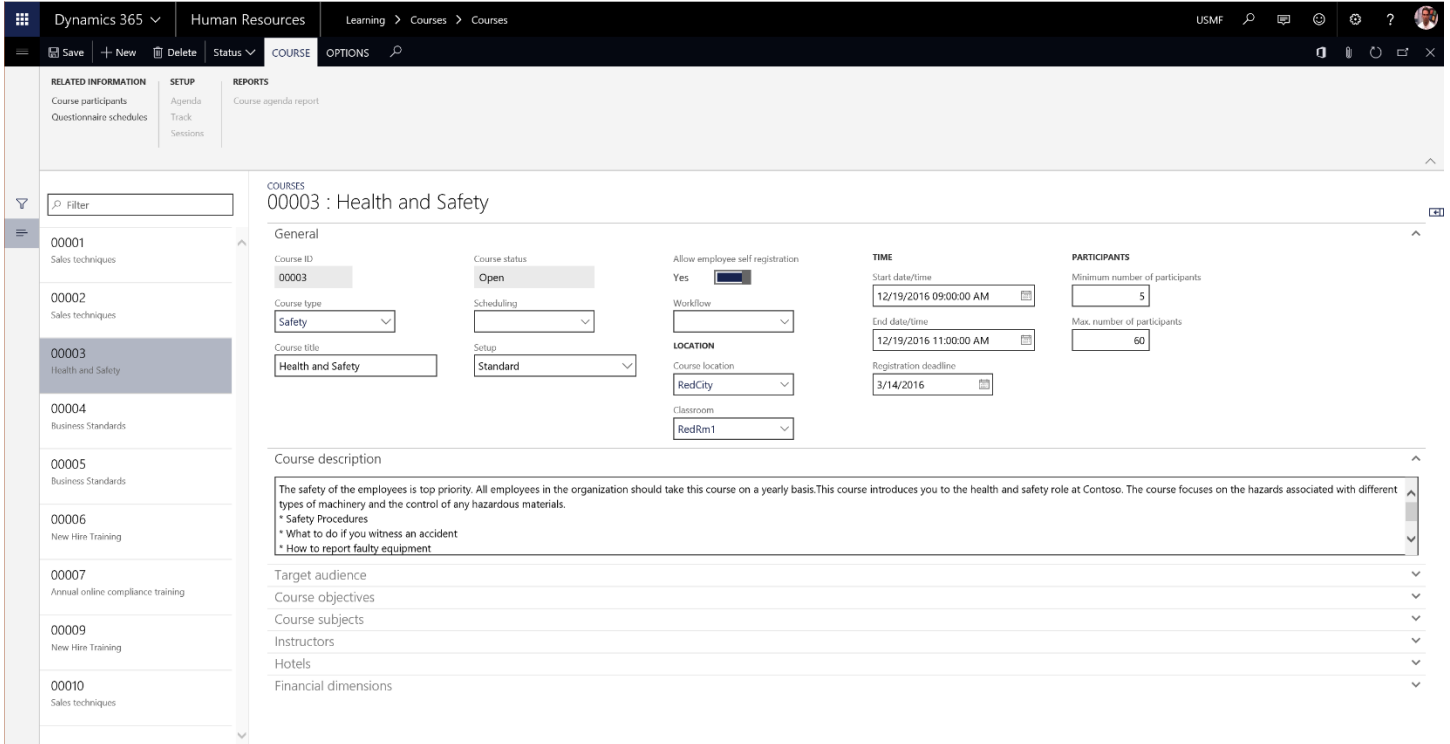


Organization Management lets you:

1. Define the jobs and positions in your organization
2. Define the required skills for those individuals filling positions
3. Assign employees and contractors to multiple positions across the enterprise
4. Create an unlimited number of hierarchies to be used throughout the application for routing of workflow tasks
5. Update positions in mass from within the application or by using Microsoft Excel based templates

Course Management

Manage classroom courses in Microsoft Dynamics 365 Human Resources. Courses can be created and maintained through course management. Once courses are created, you can manage participants and waitlists for courses while providing an employee self-service experience for signup. After courses are completed, maintain a full record of course completion along with the skills or certificates obtained through successful completion of courses.



RELATED INFORMATION
Course participants
Questionnaire schedules

SETUP
Agenda
Track
Sessions

REPORTS
Course agenda report

COURSES
00003 : Health and Safety

General

Course ID: 00003
Course status: Open
Allow employee self registration: Yes
Course type: Safety
Course title: Health and Safety
Scheduling:
Setup: Standard
Course location: RedCity
Classroom: RedRm1

TIME

Start date/time: 12/19/2016 09:00:00 AM
End date/time: 12/19/2016 11:00:00 AM
Registration deadline: 3/14/2016

PARTICIPANTS

Minimum number of participants: 5
Max number of participants: 60

Course description

The safety of the employees is top priority. All employees in the organization should take this course on a yearly basis. This course introduces you to the health and safety role at Contoso. The course focuses on the hazards associated with different types of machinery and the control of any hazardous materials.
* Safety Procedures
* What to do if you witness an accident
* How to report faulty equipment

Target audience
Course objectives
Course subjects
Instructors
Hotels
Financial dimensions

Course Management lets you:

1. Define courses
2. Track attendance, waitlists, and course logistics such as location, date time and instructors
3. Track completion with updates to employee file.
4. Update any skills obtained with completion of course.
5. Update employee certificates based on successful completion of course work.
6. Evaluate course impact and instructor effectiveness by using questionnaires
7. Provide a testing mechanism to determine pass or fail results for course completion by using questionnaire

Dynamics 365 > **Human Resources** > **Learning** > **Courses** > **Courses**

USMF

Save + New Delete Status COURSE OPTIONS

RELATED INFORMATION
Course participants
Questionnaire schedules

SETUP
Agenda
Track
Sessions

REPORTS
Course agenda report

Filter

00001 Sales techniques

00002 Sales techniques

00003 Health and Safety

00004 Business Standards

00005 Business Standards

00006 New Hire Training

00007 Annual online compliance training

00009 New Hire Training

00010 Sales techniques

COURSES
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General

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Course status: Open

Allow employee self registration: Yes

Course type: Safety

Scheduling:

Workflow:

Course title: Health and Safety

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LOCATION

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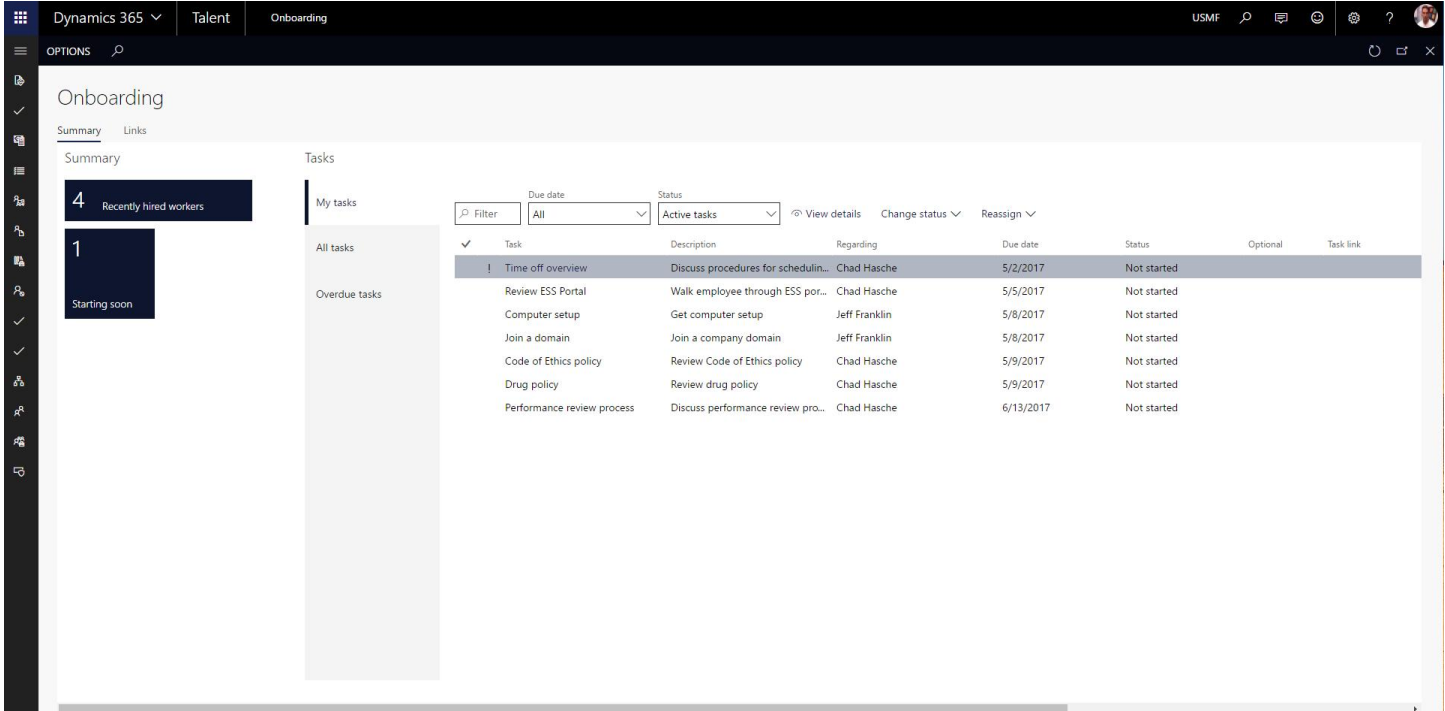
Instructors

Hotels

Financial dimensions

Onboarding and business processes

The onboarding process within Microsoft Dynamics 365 Human Resources lets HR professionals create tasks to track the onboarding progress of pending employees as well as recently hired employees. Because the onboarding process can vary between positions in a single organization, multiple onboarding checklists can be created to fit the organizations hiring process. For example, a company may have tasks that should be performed for every employee that is hired into the organization. However, there are additional tasks that need to be performed when hiring executives. Along with onboarding, there may be other business processes in the organization that require tasks to be tracked. Business processes allows you to create a business process template for processes that need to be completed within your organization. For example, your company may have a HR audit that is performed each year. A template can be created to track all the tasks that need to be completed as part of the audit process. Templates can be re-used or copied for recurring processes.



The screenshot displays the 'Onboarding' section in Microsoft Dynamics 365. On the left, a summary shows '4 Recently hired workers' and '1 Starting soon'. The main area is divided into 'My tasks' and 'All tasks'. A table lists tasks with columns for Task, Description, Regarding, Due date, Status, Optional, and Task link.

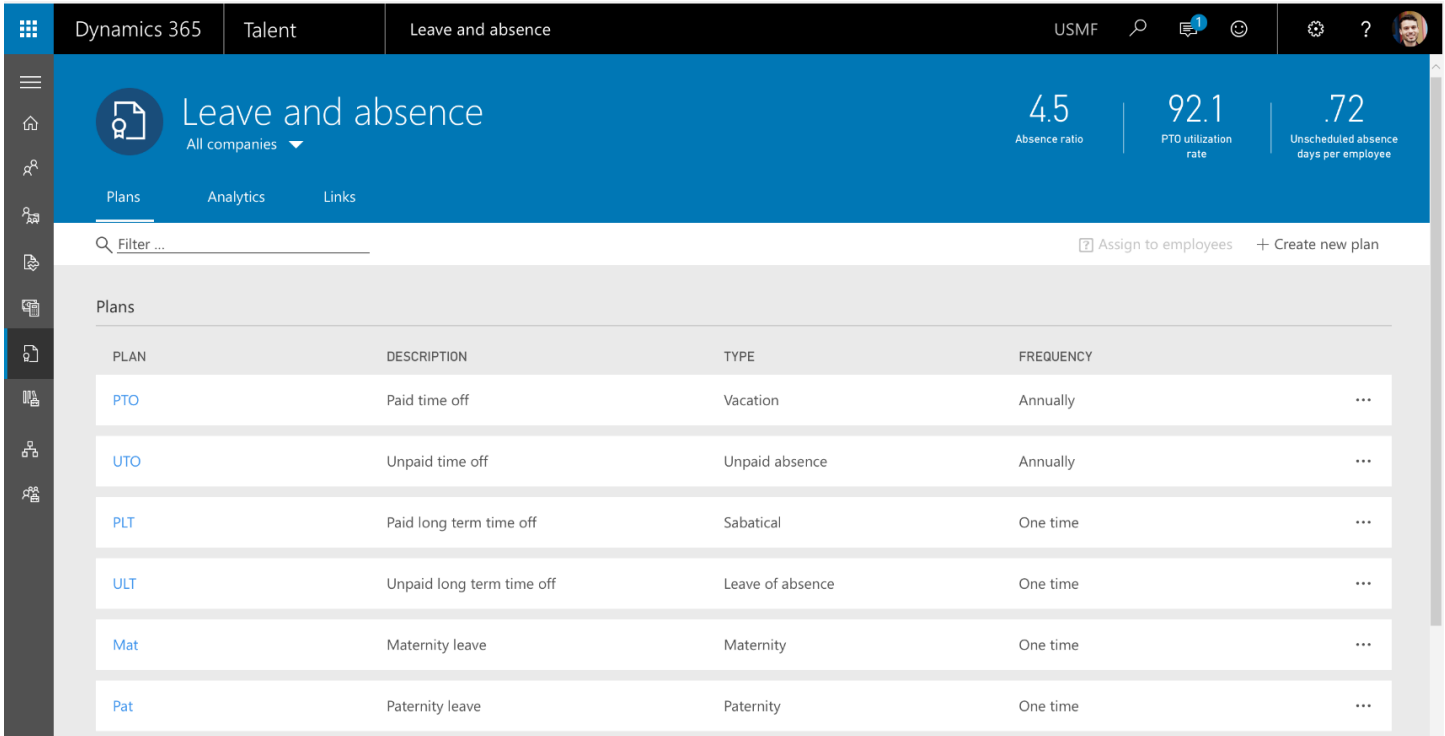
Task	Description	Regarding	Due date	Status	Optional	Task link
Time off overview	Discuss procedures for scheduling...	Chad Hasche	5/2/2017	Not started		
Review ESS Portal	Walk employee through ESS por...	Chad Hasche	5/5/2017	Not started		
Computer setup	Get computer setup	Jeff Franklin	5/8/2017	Not started		
Join a domain	Join a company domain	Jeff Franklin	5/8/2017	Not started		
Code of Ethics policy	Review Code of Ethics policy	Chad Hasche	5/9/2017	Not started		
Drug policy	Review drug policy	Chad Hasche	5/9/2017	Not started		
Performance review process	Discuss performance review pro...	Chad Hasche	6/13/2017	Not started		

Onboarding and business processes lets you:

1. Define templates for onboarding, offboarding, and employee transitions
2. Define calendars to apply to tasks for all processes
3. Assign checklists as part of the process defined
4. Analyze past due tasks and identify bottlenecks in the process
5. Assign tasks to employees, positions, managers and new employees
6. Provide instructions to all tasks
7. Define "deep links" to drive employees of assigned tasks directly to the right areas in the right context
8. Assign checklists at any point in the process
9. Ability to re-assign tasks and update due dates
10. Update check list during completion by marking items as complete, adding new tasks or removing tasks

Leave and Absence Management

Microsoft Dynamics 365 Human Resources offers a flexible framework for defining the leave and absence management process. Leave and absence plans can be created to determine how employees accrue or are granted time off. Once an employee has plan assigned, he or she can submit time off requests to be approved by managers. Absence tracking allows both first level managers and human resource managers to see who is taking time off and how much time off they have remaining.



Leave and absence
All companies ▼

Plans Analytics Links

Filter ... Assign to employees + Create new plan

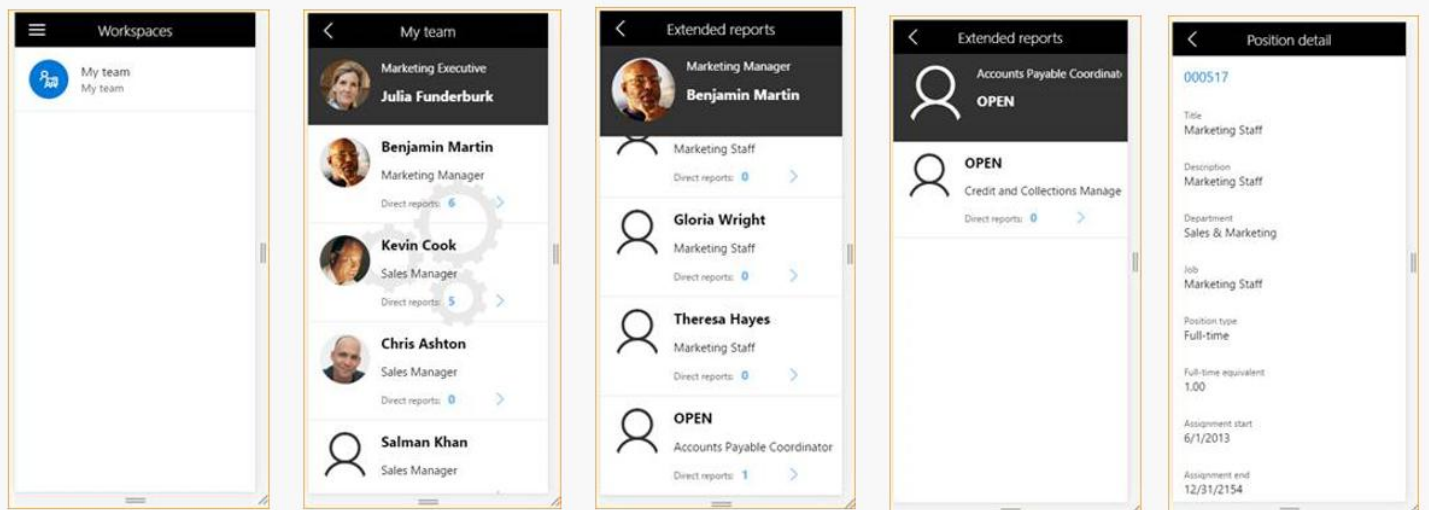
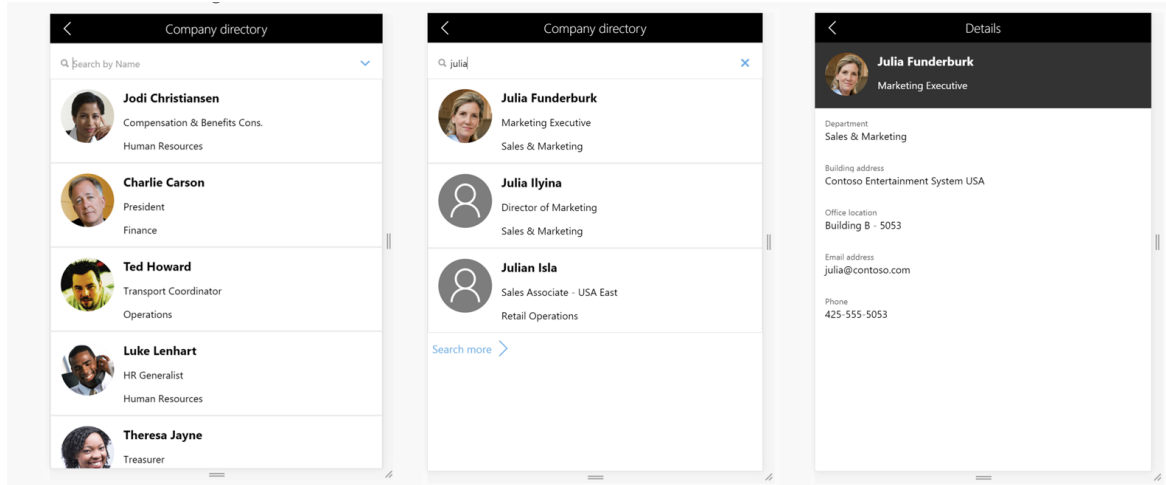
PLAN	DESCRIPTION	TYPE	FREQUENCY
PTO	Paid time off	Vacation	Annually
UTO	Unpaid time off	Unpaid absence	Annually
PLT	Paid long term time off	Sabatical	One time
ULT	Unpaid long term time off	Leave of absence	One time
Mat	Maternity leave	Maternity	One time
Pat	Paternity leave	Paternity	One time

Absence management lets you:

1. Define leave and absence types and plans
2. Assign leave and absence plans to multiple employees at time based on selected criteria
3. Define how often an employee accrues time off whether it's annually, monthly, bi-monthly or any other frequency
4. Create tiers based on employment start dates for accruing employee time off
5. Specify carry-over amounts along with minimum and maximum accrual amounts
6. Suspend leave and absence plans as needed
7. Adjust entitlements and grants for individual employees
8. Specify employee specific start dates for accruing time off
9. Apply workflow to time off requests
10. View time off balances and submit time off requests for approval
11. Track employee plan enrollment and time off balances by type
12. Analyze absence and utilization rates

Mobile

Microsoft Dynamics 365 Human Resources client scales to smaller devices. For iPhone, Android and Windows phones, new workspaces have been developed to provide a phone experience for employees and managers as part of the Microsoft Dynamics 365 Human Resources application.



My team workspace

View your team and the number of direct reports in a single view

View skip level team members within your organization

View open positions in your organization

View position details including available to fill dates...

Mobile Optimized:

Company Directory – Employee communication and contact

1. Contact list for all employees in the organization
2. Search for anyone in the organization
3. View public address book information for Location, email and phone

4. Call, text or email contacts
5. Coming Soon: additional content including LinkedIn profile navigation
6. Coming Soon: Send Praise/Feedback

Manager (your team) – View key employee data across your organization

1. View your direct reports and all employees that are in your organization
2. View team members and any open positions in a single view
3. Navigate up and down the hierarchy for your organization
4. View key details for anyone in your org
5. Additional content including LinkedIn profile navigation
6. Additional action for employees and surfacing of additional data

Employee – View key employee data across your organization

1. View key information about your employee record
2. Update employee Image/contact information
3. Additional content including LinkedIn profile navigation and content
4. Additional action for employees and surfacing of additional data

About Unify Dots

Unify Dots helps you connect the Dots by providing business solutions that enable digital transformation. Unify Dots specializes in CRM, Customer Service, Customer Insights, Ecommerce, ERP, Order Management, Field Service, Inventory, Procurement, Project Operations, Marketing Automation, Sales Automation, Supply Chain, Point of Sale, and Warehouse Management solutions.



Unify Dots operates in Asia Pacific, Australia, New Zealand, Europe, North America and across the globe with a local touch. Unify Dots is also committed to improving the world and has pledged donating at least 25% of its profit towards the cause of helping educate children from low-income families in developing countries.

Contact Unify Dots

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