Dynamics 365 Human Resource - Customization, Development and Consulting Practice

Cognitive Convergence is Subject Matter Expert in Office 365, Dynamics 365, SharePoint, Project Server, Power Platform: Power Apps-Power BI-Power Automate-Power Virtual Agents.

Our Microsoft Dynamics 365 Human Resource Consulting, Development, Customization, Integration services and solutions, can help companies maximize business performance, overcoming market challenges, achieving profitability and providing best customer service.

Contents

1. DYNAMICS 365 HUMAN RESOURCE

Dynamics 365 Human Resources provides the workforce insights you need to build data-driven employee experiences across multiple areas, including:

- Compensation
- Benefits
- Leave and absence
- Compliance
- Payroll integration
- Performance feedback
- Training and certification
- Self-service programs

Human Resources connects people and operations data to help you optimize workforce costs and take care of your employees.

2. PLAN HUMAN RESOURCES ENVIRONMENTS

Before you create your first Human Resources environment, you should carefully plan the environment needs for your project. A base subscription to Human Resources includes two environments: a production environment and a sandbox environment. Depending on the complexity of your project, you may need to purchase additional sandbox environments to support project activities.

Considerations for additional environments include, but aren't limited to, the following:

- **Data migration**: You may need to consider an additional environment for data migration activities to allow your sandbox environment to be used for testing purposes throughout the project. Having an additional environment allows data migrations activities to continue while testing and configuration activities occur simultaneously in a different environment.
- **Integration**: You may need to consider an additional environment to configure and test integrations. This could include native integrations like the Ceridian Dayforce LinkedIn Talent Hub integrations, or custom integrations such as those for payroll, applicant tracking systems, or benefit systems and providers.
- **Training**: You may need a separate environment that is configured with a set of training data to train your employees on use of the new system.
- **Multi-phase project**: You may need an additional environment to support configuration, data migration, testing, or other activities in a project phase that is planned after the initial go-live of the project.

3. PROVISION A HUMAN RESOURCES PROJECT

After you've created an LCS project, you can provision Human Resources into an environment.

- In your LCS project, select the Human Resources App Management tile.
- Indicate whether this environment is a Sandbox or Production instance of Human Resources. Early preview features may be available in Sandbox instances to allow for early feedback and testing.
- elect the Include Demo Data option if you want your environment to include the same demo data set used in the Human Resources Test Drive experience. Demo data is beneficial for long-term demo or training environments and should never be used for production environments. You must choose this option upon initial deployment. You can't update an existing deployment later.

- Human Resources is always provisioned into a Microsoft Power Apps environment to enable Power Apps integration and extensibility. Read the "Selecting a Power Apps environment" section of this article before you continue. If you don't already have a Power Apps environment, select Manage environments in LCS or navigate to the Power Apps Admin center.
- Select the environment to provision Human Resources into.
- Select Yes to agree to the terms and begin deployment.
- Your new environment appears in the list of environments in the navigation pane on the left. However, you can't start to use the environment until the deployment status is updated to Deployed. This process typically takes a few minutes. If the provisioning process is unsuccessful, you must contact Support.
- Select Log on to Human Resources to use your new environment.

4. MODULAR AND SCALABLE

HR for Dynamics has a modular structure, ranging from the addition of an existing HR system to the deployment as a fully comprehensive HR management solution.
Furthermore, the solution is flexibly scalable. Editions are available for small and medium-sized companies up to large corporations.
With the industry templates, HR for Dynamics is prepared for the use in your industry. So you can start immediately out-of-the-box and benefit from the experience of many customers in your industry. The solution is certified for many countries so that even internationally oriented companies can use the solution to meet the specific requirements of individual country branches.

5. RECRUITING & ONBOARDING

Recruiting & Onboarding extends Microsoft Dynamics 365 with professional applicant management and onboarding module for new employees.
From job planning and applicant management all the way to creating an offer: the module supports you throughout the entire applicant life cycle. You will be supported further until the new employee's first day at work and beyond that until the end of the onboarding.

4.1 All highlights at a glance

- Position planning and approval process
- Integration to LinkedIn, Stepstone, XING, Broadbean etc.
- Applicant management including automated communication
- CV Parsing with Textkernel
- Talent search & applicant pools
- Application duplicate detection
- Online Interviews with Office 365 Teams
- Creation of offers including digital signature (DocuSign, AdobeSign)
- Realtime data analysis via dashboards
- GDPR Compliance

6. EMPLOYEE ADMINISTRATION

The employee administration module provides all important functions for employee administration. In the digital personnel file, you have everything at a glance. The software takes over time-consuming routine tasks. Employees create requests in the self-service portal and check information, such as remaining leave days, themselves. They all save a lot of time

The module for employee administration provides all important functions for organizing your employees. In the digital personnel file, you have all data and documents of each employee at a glance. The Dynamics platform even gives you access to information from the different departments of your employees.

HR for Dynamics provides automation for a large number of routine activities out-of-the-box. Time-consuming routine tasks are thus handled by the software. You only need to monitor with the support of comprehensive dashboards.

In HR for Dynamics, all employees and managers have access to a convenient self-service portal. These self-services also reduce the load of routine tasks for HR administration. All tasks are performed in one single uniform interface, in Outlook, Microsoft Teams, in the web browser or mobile with all common end devices, if you wish.

6.1 Highlights of the Employee Administration Module

- Integrated HR administration without IT islands
- All data of the employees in their digital personnel file
- 360° digital personnel file & document management
- Automation of routine activities
- Self-Services support and reduce effort in HR administration
- Automated preparation of payroll accounting
- Easy planning of individual working times with work patterns
- Management of equipment and devices of your employees
- Create job work certificates in the shortest possible time using the certificate generator
- Time tracking and access control with Dormakaba integration
- Manage disciplinary measures
- Company-wide employee calendar
- Finding skills of employees
- Full integration of Microsoft Teams, Outlook, Word and Excel

7. TALENT MANAGEMENT

Talent Management provides all the features you need for talent management in Microsoft Dynamics 365 and Office 365.

From performance reviews to target agreements, right through to organization of trainings - you'll find comprehensive measures for staff development.

- Performance reviews
- Skills and responsibilities
- Target assessments
- 360° feedback
- Performance Potential Analysis (9 Box Grid)
- Training calendar and training management
- Advanced training and certification
- Medical records and certification

7.1 Goals

Individual goals are quickly and simply set during Performance Review for later follow-up. Goals could be actions or skills, trainings, and certificates, which should be reached by a specific date. Dynamics Talent Management offers a selection of set goals via a drop-down-menu.

Due to the automatic transfer of goals into the digital personnel file, it is possible to check progress at any time. With this, reaching and following up on goals is child's play.

- Set structured, long-term goals in Performance Reviews
- Select required skills and skill levels per drop-down-menu
- Select required trainings and certificates
- Optional deadline for reaching set goals
- Set optional bonus agreement
- Check and record status and progress at any time
- Goals are automatically transferred into the digital personnel file

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7.2 Employee Skills

With the assistance of Dynamics Talent Management, you keep a close eye on the skills of your employees and can immediately address possible deficits. Set requisite skills and skill level for each employee. All required and actual skills are shown in a chart, directly in the digital personnel file.

Assign training for respective employees if and when action is needed.

- See all employee skills briefly
- Comparison of required and actual skills per employee
- Evaluation via charts display immediate overview of potential deficits
- Register employees directly for trainings to improve skills

7.3 Foster a culture of excellence

Provide continuous feedback and reward high performers by turning performance into a daily, two-way conversation between employees and managers.

View real-time performance dashboards and track accomplishments

Get full transparency around employee performance to take immediate corrective action

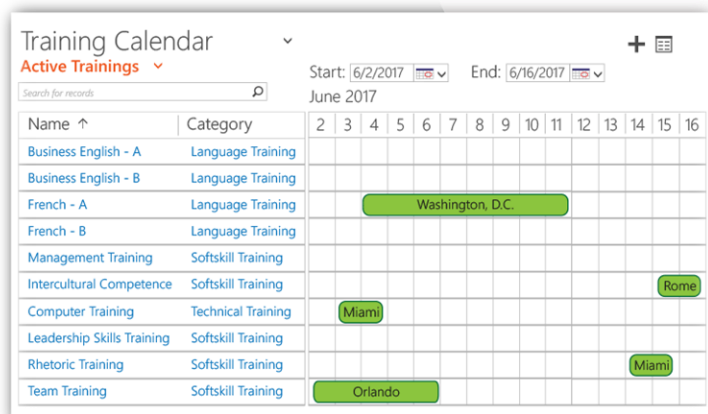
Offer visibility through performance journals, real-time feedback, and collaborative goal management

7.4 Training Calendar

With the trainings calendar in Dynamics Talent Management, you have a company-wide overview of all planned trainings. Filter by category, for instance to view only language trainings.

The respective trainings timeframes are shaded in the calendar and can be moved quickly and easily, if necessary, by drag-and-drop.

- All training events in one calendar
- Filter of trainings categories possible
- Quickly move trainings via drag-and-drop
- View information to participants, agenda etc. with one click
- Availability of participants in seconds
- Employees view relevant trainings in their Outlook calendar
- Completed trainings are automatically shown in digital personnel file



8. TIME & ATTENDANCE

The Time & Attendance module provides you with all the functions you need to track, evaluate, and further process attendances and working hours by your employees.

Every company is different, every employee and every situation require different ways of time tracking. In the solution, employees have six different alternatives for their time tracking.

Rules for breaks and working times ensure compliance and safety at work. Managers and HR always have an overview of current attendances and can evaluate all data and correct it if necessary.

Standard integrations to common ERP systems and to the Dynamics 365 module Project Service Automation (PSA) are directly available.

8.1 Time & Attendance Highlights

- Complete solution for tracking attendance and working hours
- Integrated time control functions
- Mandatory break rules
- Rules and regulations for time bookings incl. maximum working hours
- Time accounts and overtime hours
- Current employee attendances at a glance
- Time sheet capturing either on processes, projects, cost centers or other allocations
- Daily, weekly, monthly, and yearly overviews
- Transfer of times and hours to payroll
- Option to automatically book out incl. information to supervisors
- Real-time dashboards and reports as well as export to Excel
- Integration to Teams Shift

8.2 Time & Attendance for Microsoft Teams

Time & Attendance for Teams extends Microsoft Teams with a complete solution for attendance and working hours.

It provides all the functions you need to track, evaluate and further process the attendances and work performance of your employees.

Rules and regulations for breaks and working hours ensure compliance and work safety. Supervisors and HR always have an overview of current attendances and can evaluate all data and correct it, if necessary.

All tasks are completed in the Microsoft Teams interface - simply use your Outlook, preferred browser or all common end devices.

9. LEAVE & ABSENCE

The Leave & Absence module extends HR for Dynamics with comprehensive options for requesting and managing leave such as vacation, illness, parental leave and much more.

Self-services are available to employees for entering their leave. These can also be used while traveling and working from home. For requests requiring approval, such as leave or overtime compensation, the process is organized by the system. Managers and HR can approve them, view availability on calendars and evaluate the information.

10. TRAVEL & EXPENSES

The Travel & Expenses module extends HR for Dynamics with professional travel management. It covers all steps from planning, approval, and organization of the trip to the entry of receipts and the calculation of expenses.

Using the self-services, employees have mobile access to all information and documents of their trip from anywhere in the world. Photos of receipts can be captured directly via smartphone. In addition, employees can have the system calculate their additional expenses for meals. The expenses are immediately forwarded to finance and accounting for quick reimbursement to the employees.

- Configure data management
- Manage features
- Explore the user interface
- Prepare for go-live

Managers are involved in the approval process for travels and expenses and can give their approval with a single click.

11. SUPPORTED GEOGRAPHIES

Human Resources currently supports the following geographies:

- United States
- Europe
- United Kingdom
- Australia
- Canada
- Asia

When you create a Human Resources environment, you select a Power Apps environment to associate with the Human Resources environment. The Human Resources environment is then provisioned in the same Azure geography as the selected Power Apps environment. You can select where the Human Resources environment and database physically reside by selecting the geography when creating the Power Apps environment that will be associated with the Human Resources environment.

You can select the Azure geography in which the environment is provisioned, but you can't select the specific Azure region. Automation determines the specific region within the geography in which the environment is created to optimize load balancing and performance.

12. DATA MANAGEMENT

The data management framework consists of the following concepts:

- Data entities - A data entity is a conceptual abstraction and encapsulation of one or more underlying tables. A data entity represents a common data concept or functionality, for example, Customers or Vendors. Data entities are intended to be easily understood by users familiar with business concepts. After data entities are created, you can reuse them through the Excel Add-in, use them to define import/export packages, or use them for integrations.
- Data project - A project that contains configured data entities, which include mapping and default processing options.
- Data job - A job that contains an execution instance of the data project, uploaded files, schedule (recurrence), and processing options.
- Job history - Histories of source to staging and staging to target jobs.

- Data package - A single compressed file that contains a data project manifest and data files. This is generated from a data job and used for import or export of multiple files with the manifest.

The data management framework supports using data entities in the following core data management scenarios:

- Data migration
- Set up and copy configurations
- Integration

12.1 Data entities

Data entities provide conceptual abstraction and encapsulation of underlying table schema that represent data concepts and functionalities. In Microsoft Dynamics AX 2012, most tables, like the Customer and Vendor tables, were de-normalized and split into multiple tables. This was beneficial from a database design point of view, but made it difficult for implementers and ISV's to use without a thorough understanding of the physical schema. Data entities were introduced as part of data management to be used as a layer of abstraction to easily understand by using business concepts. In previous versions there were multiple ways to manage data, such as Microsoft Excel Add-ins, AIF, and DIXF. The concept of data entities combines those different concepts into one. After data entities are created, you should be able to reuse them for an Excel Add-ins, import/export, or integration. The following table shows core data management scenarios.

Data Migration	• Migrate reference, master, and document data from legacy or external systems.
Setup and copy configuration	• Copy configuration between company/environments. • Configure processes or modules using the Lifecycle Services (LCS) environment.
Integration	• Real-time service based integration. • Asynchronous integration.

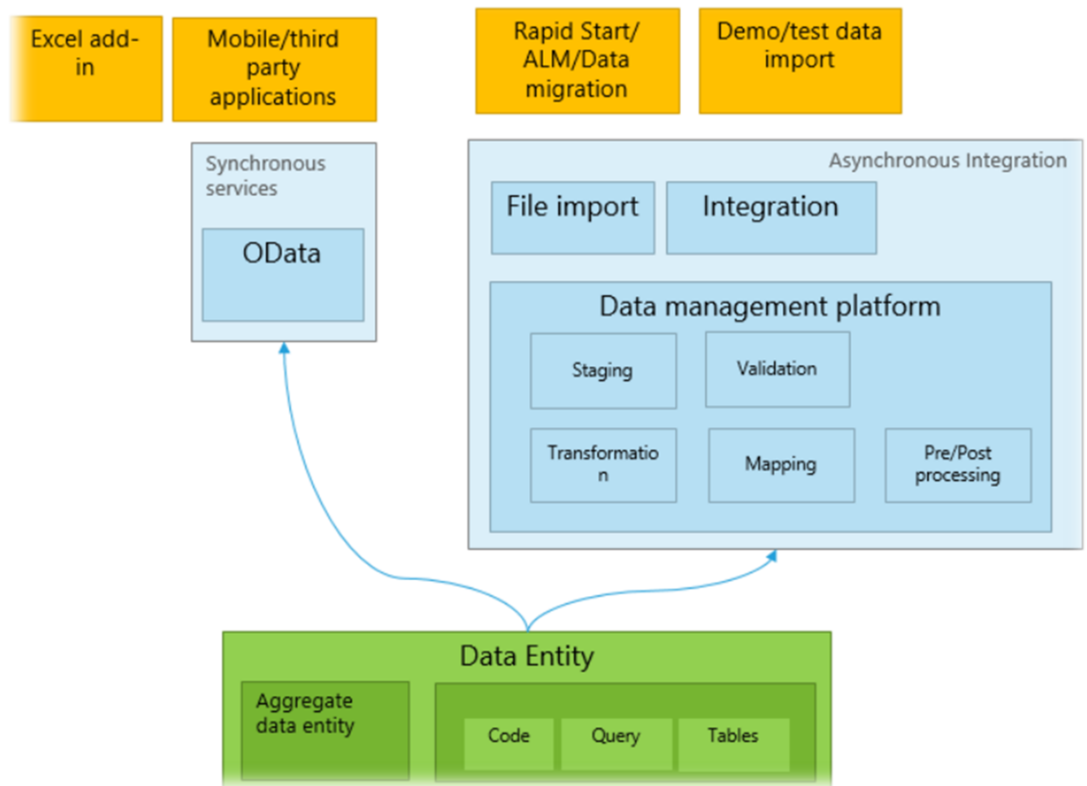
12.2 Data migration

Using the data management framework, you can quickly migrate reference, master, and document data from legacy or external systems. The framework is intended to help you quickly migrate data by using the following features:

- You can select only the entities you need to migrate.
- If an import error occurs, you can skip selected records and choose to proceed with the import using only the good data, opting to then fix and import the bad data later. You will be able to partially continue and use errors to quickly find bad data.
- You can move data entities straight from one system to another, without having to go through Excel, or XML.
- Data imports can be easily scheduled using a batch, which offers flexibility when it is required to run. For example, you can migrate customer groups, customers, vendors, and other data entities in the system at any time.

13. DATA ENTITIES

A data entity is an abstraction from the physical implementation of database tables. For example, in normalized tables, a lot of the data for each customer might be stored in a customer table, and then the rest might be spread across a small set of related tables. In this case, the data entity for the customer concept appears as one de-normalized view, in which each row contains all the data from the customer table and its related tables. A data entity encapsulates a business concept into a format that makes development and integration easier. The abstracted nature of a data entity can simplify application development and customization.



13.1 Capabilities

A data entity has the following capabilities:

- It replaces diverging and fragmented concepts of AXD, Data Import/Export Framework (DIXF) entities, and aggregate queries with single concept.
- It provides a single stack to capture business logic, and to enable scenarios such as import/export, integration, and programmability.
- It becomes the primary mechanism for exporting and importing data packages for Application Lifecycle Management (ALM) and demo data scenarios.
- It can be exposed as OData services, and then used in tabular-style synchronous integration scenarios and Microsoft Office integrations.

13.2 Parameter

- Functional or behavioral parameters.
- Required to set up a deployment or a module for a specific build or customer.
- Can include data that is specific to an industry or business. The data can also apply to a broader set of customers.
- Tables that contain only one record, where the columns are values for settings. Examples of such tables exist for Account payable (AP), General ledger (GL), client performance options, workflows, and so on.

13.3 Reference

- Simple reference data, of small quantity, which is required to operate a business process.
- Data that is specific to an industry or a business process.
- Examples include units, dimensions, and tax codes.

13.4 Master

- Data assets of the business. Generally, these are the "nouns" of the business, which typically fall into categories such as people, places, and concepts.
- Complex reference data, of large quantity. Examples include customers, vendors, and projects.

13.5 Document

- Worksheet data that is converted into transactions later.
- Documents that have complex structures, such a several line items for each header record. Examples include sales orders, purchase orders, open balances, and journals.
- The operational data of the business.

13.6 Transaction

- The operational transaction data of the business.
- Posted transactions. These are non-idempotent items such as posted invoiced and balances. Typically, these items are excluded during a full dataset copy to reduce the volume of data that is copied/migrated. Migrating completed transactions can also lead to further complexity in trying to preserve the referential integrity of related data in the new system. In general, transactions from a completed business process are not migrated in detail but in summary.
- Examples include pending invoices.

14. MANAGE DATABASE LOGGING

You can track changes to tables and fields in Dynamics 365 Human Resources with database logging.

Database logging tracks specific changes to Microsoft Dynamics 365 Human Resources tables and fields. These changes include inserting, updating, or deleting. Database logging stores a record of changes to tables or fields in the database log table.

The business uses of database logging include:

- Creating an audit record of changes to specific tables that contain sensitive information.
- Tracking single transactions. Database logging isn't intended for tracking automated transactions that run in batch jobs.

14.1 Security for database logging

Database logs can contain sensitive data. Limit access to include only security roles that need access to the log data.

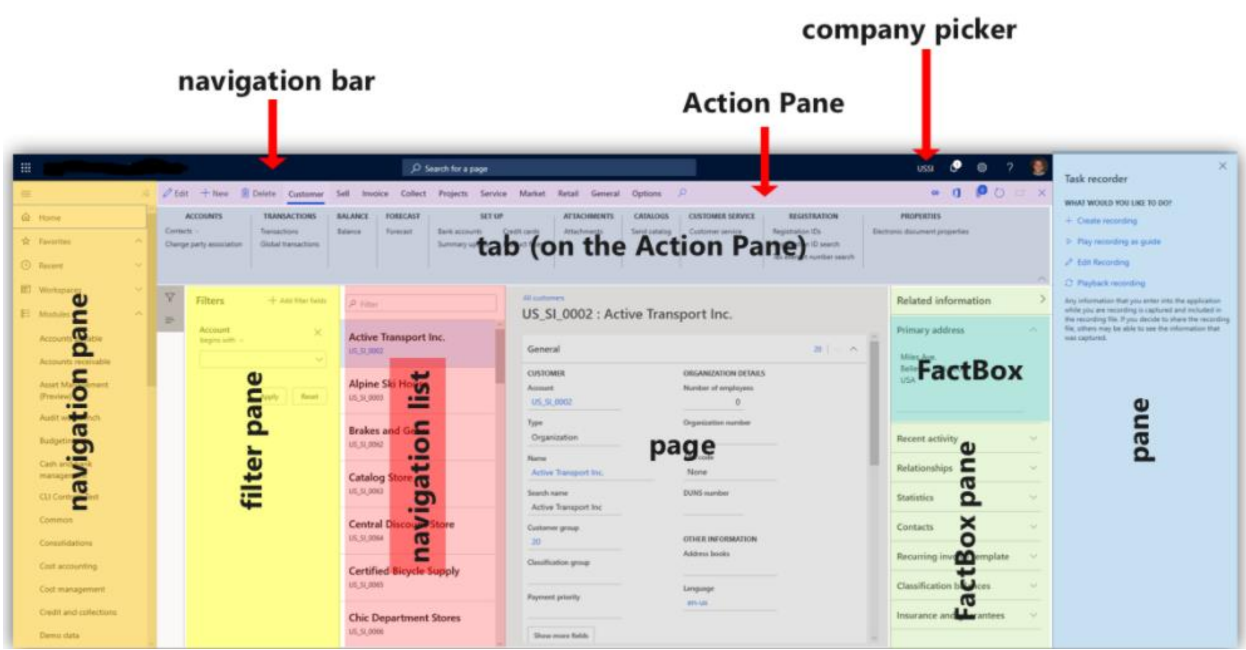
14.2 Database logging and performance

While valuable from a business perspective, database logging can be expensive in resource use and management. The performance implications of database logging include:

- The database log table can grow quickly and cause an increase in the size of the database. Growth depends on the amount of logged data that you decide to keep. By default, the database log table maintains only 30 days of log data.
- Database logging can adversely affect long-running automated processes, such as long-running data imports

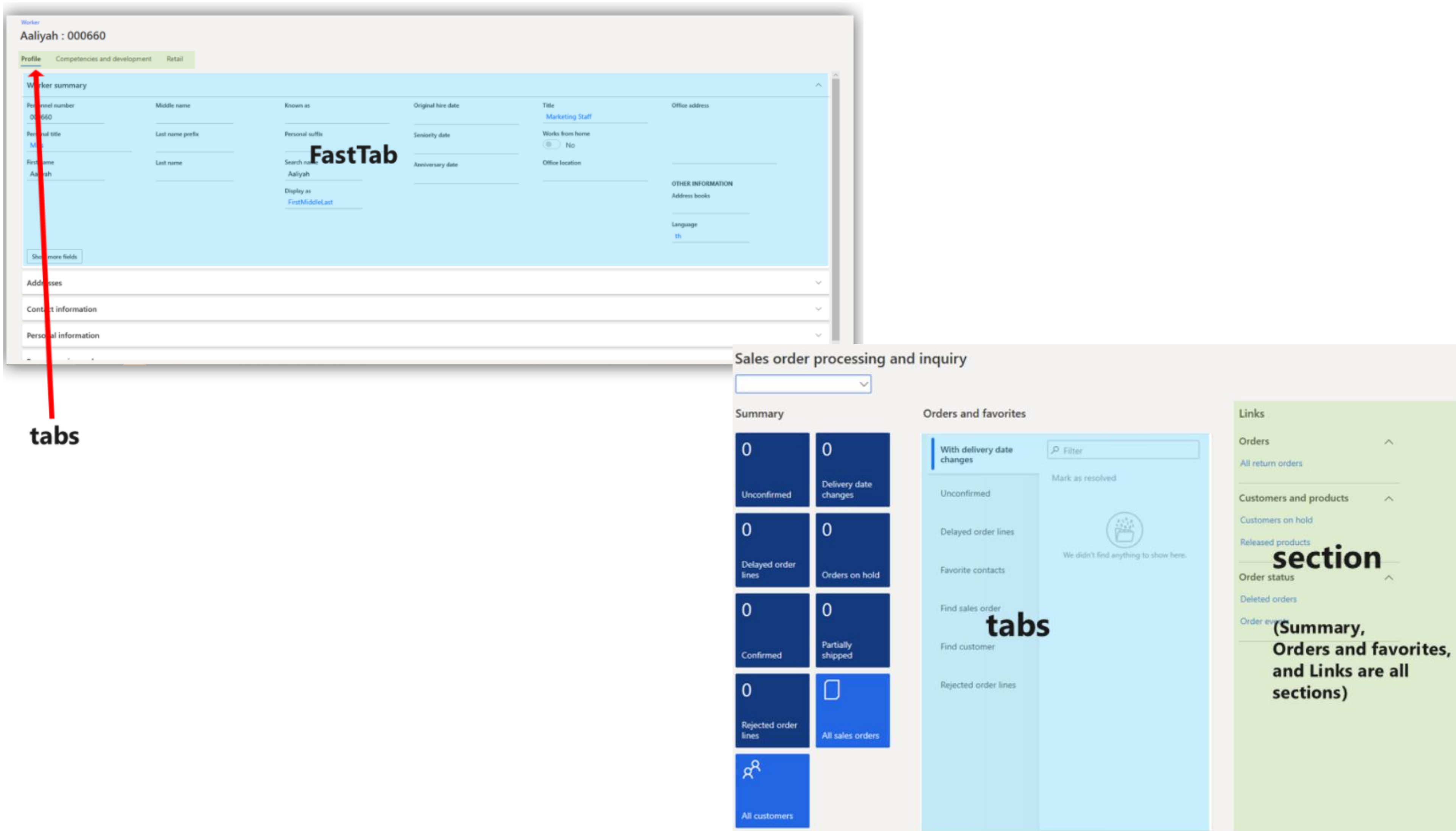
15. USER INTERFACE ELEMENTS

- **Action Pane** - The bar beneath the navigation bar. Here, you can select tabs to change records shown in the page. You can edit and save the records here.
- **FactBox** - You can see information and follow the activities of certain records in this pane.
- **FactBox** pane Here, you can scroll through different aspects of a record to view in the FactBox.
- **Filter pane** - On some pages, you can select Show filters to open this pane. It allows you to narrow the results visible to you on the page.
- **Navigation bar** - The bar at the top of the interface. It contains the Dynamics 365 portal, Search, company picker, Action center, Settings, Help & Support, and the user profile.
- **Navigation list** - On some pages, you can scroll through this pane to find a specific record. When selected, the details of the record will appear in the page.
- **Navigation pane** - The left-most pane. From here, you can find any page in the product.
- **Page** - The central focus of the interface. Selections made on the other UI components will affect what records are shown here.
- **Pane** - The right-most pane. This will open in some cases when aspects of a record need to be changed and saved.
- **Tab** - When referring to the Action Pane, it's a menu of options that appears when you select a given option in the Action Pane.



15.1 Tabs, fields, and sections

- A **tab** is a selection made on the page that opens a different aspect of a record on the same page. Often, it will allow you to change certain fields, or UI elements that allow typed input.
- A **FastTab** is a tab with the added benefit of allowing multiple tabs to be visible at the same. You can expand a **FastTab** by selecting the downward-pointing arrow on the right end of it.
- A section is like a tab. The word "section" is often used to describe any area of a page that organizes a specific category of information. In the following image, Summary, Orders and favorites, and Links are all examples of sections.



16. FEATURE MANAGEMENT WORKSPACE

You can open the Feature management workspace by selecting the appropriate tile on the dashboard. You will see a page that shows a list of features for all releases that are supported by the Feature management experience. Over time, Microsoft will enhance the Feature management experience so that it includes more functionality to help you manage features.

The feature list includes the following information:

- **Feature name** – A description of the feature that was added.
- **Enabled status** – A symbol indicates whether a feature has been turned on (check mark), hasn't been turned on (blank), is scheduled to be turned on (clock), is mandatorily turned on (lock), requires attention before you turn it on (warning), or can't be enabled (X). The setting that is shown is used for all legal entities. Note that even when a feature has been turned on, it's still controlled by security. Therefore, the feature will be available only to users who have access to it, based on their security role. It will also be available only in legal entities that the user has access to.
- **Enable date** – The date when the feature was turned on or is scheduled to be turned on.
- **Feature added** – The date when the feature was added to your environment. This date is automatically entered when you update your environment during the monthly release cycles.
- **Module** – The module that is affected by the new feature.

The Feature management workspace also has several tabs, each of which shows a list of features.

- **New** – This tab shows all features that have been added since the last monthly update. If you've skipped any monthly updates, the tab shows all the new features that have been added since the last time that you updated. The newest features appear at the top of the list. The total number of new features is also shown on a tile at the top of the page.
- **Not enabled** – This tab shows all features that haven't been turned on. The newest features appear at the top of the list. The total number of new features that haven't been turned on is also shown on a tile at the top of the page.
- **Scheduled** – This tab shows all features that have been scheduled to be turned on in the future. The features that have the earliest scheduled date appear at the top of the list. The total number of schedule new features is also shown on a tile at the top of the page.
- **All** – This tab shows all features. The newest features appear at the top of the list.

17. CONCLUSION

Cognitive Convergence is currently helping a handful of clients implement Dynamics 365 Human Resource, so we can attest that it is a strong product when used in the right situations. The easiest way to mitigate these risks is to hire an independent, technology-agnostic digital transformation consulting firm such as Cognitive Convergence to help validate your software decision, prepare for implementation readiness, help manage your organizational change program, and provide quality assurance over your system integrator.

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