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Transform your Human Resources Department with Dynamics 365 for Talent

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Overview

This guide is intended to be a high-level, quick and easy read about the functionality and capabilities of Microsoft Dynamics 365 for Talent. Included are screenshots from the Talent application so you can see how it helps recruits, new hires and HR professionals experience an optimized process.

Included in this guide:

Digital Workplace

Security Administration

Modular App: Attract

Modular App: Onboard

The Technology Behind Talent

Personalize Talent Management

GDPR (General Data Protection Regulation)

Performance Management

Benefits Management

PowerApps

Embed External URL

Date Effective Data

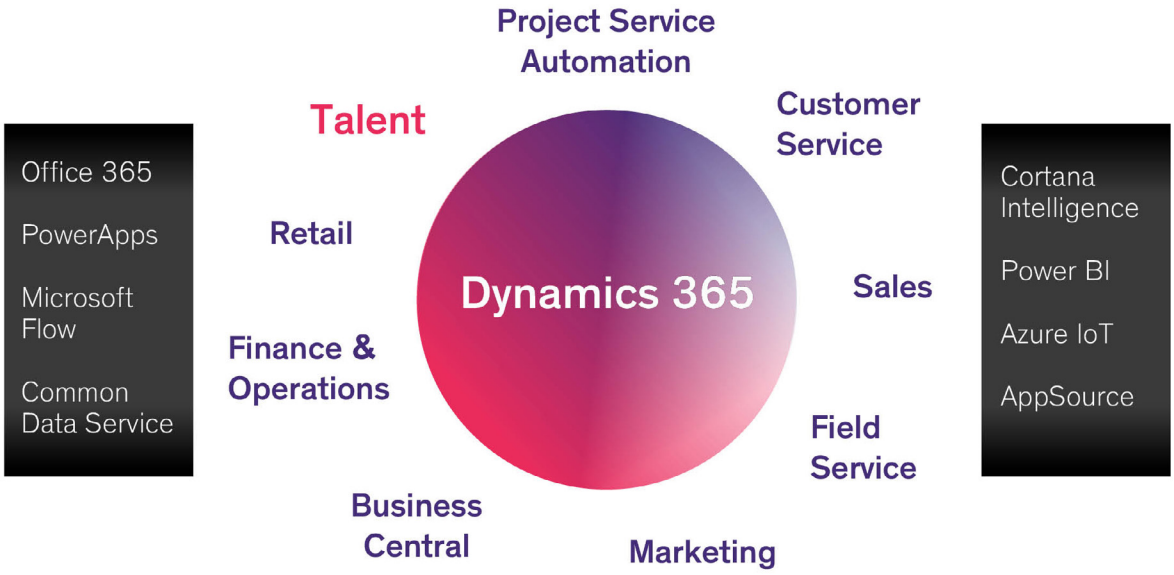
Questionnaire

Data Connectors

Analyzing Your Data and Power BI

How Much Does it Cost?

The Dynamics 365 Solution Set and How Talent Fits In



What's Included in Dynamics 365 for Talent?

Talent is a stand-alone application, a cloud based human capital management SAAS solution. It helps organizations strategically attain, empower and optimize their talent to achieve high impact sustainable results.

Common Data Service (CDS) brings together data from Dynamics 365 and other Microsoft applications to save steps involved in collecting data manually. It's important to note that the CDS is the backend database for Dynamics 365 for Talent.

Talent does not offer a payroll solution, only US Payroll is offered through the Finance and Operations application. For clients outside the US, Microsoft is partnering with Ceridian and ADP. If you are using a different payroll provider, then you can manually modify the data included in the export package and then export the data package to any file storage location where your payroll software can access it.

The Talent application offers similar functionality to the HR module in Dynamics 365 Finance and Operations. Dynamics 365 for Talent can be purchased as a standalone solution or as part of the full Dynamics 365 product suite. Purchase of the Talent application does not require the purchase of Dynamics 365 Finance and Operations, which gives Talent an edge.

Dynamics 365 for Talent helps fulfill the potential of your workers, while reducing the cost and complexity of administrating worker and organizational information. You can empower employees to enter transactional data, so you can focus on HR strategy.

In Dynamics 365 for Talent, there are two main experiences: Talent and HR. The entire Dynamics 365 product suite is tightly integrated with Office 365 to provide a seamless navigation experience for users. However, purchase of Office 365 is not required to use Dynamics 365 applications or experiences.

In addition to Office 365, PowerApps are used as an extension to deliver new functionality in the Talent application.

Microsoft Flow is used to orchestrate the movement of data and information from one application to another. The entire solution is built upon the Common Data Service (CDS) which enables quick and easy data extensions.

To deliver first-class reporting analytics, Dynamics 365 leverages Cortana Intelligence suite along with Power BI for rich reporting experiences that can be embedded into each of the web applications. Microsoft delivers Power BI dashboards and reports embedded into each workspace out of the box.

Digital Workplace – How Did We Get Here?

The HR/Payroll industry is changing faster than ever. For many years the focus on HR technology was to automate and integrate HR practices. However, there is now a greater demand for productivity.

Dynamics 365 for Talent helps organizations meet the requirements of your business. It allows workers and management to move from a transactional focus to a more strategic focus and empowers users to make decisions quickly. Talent delivers features that enable your employees to be empowered to access their personal information quickly and easily, to make decisions, know who to contact for help and much more.

Employees are now expected to be engaged with their manager, attain work/life balance, continue their professional development, be flexible, and collaborate with co-workers across the globe. Employees are also looking to run their daily tasks on the go on a mobile device.

Part of this culture shift and digital transformation in the HR world include the concept of performance coaching. Employees don't just want an impersonal annual review, and managers want to be more proactive in giving feedback. The tools in Dynamics 365 for Talent enable your employees and managers to provide continuous feedback and mentorship that enhances this relationship. Also, businesses are now demanding more insights into what their employees are doing and wanting real time updates on employee and departmental performance. People analytics is about making a shift from reporting on dollars and head counts towards a model that is about listening to the voice of the employee. It provides insights that not only help drive insight for the optimal outcome for your employees, but also for your employees to drive optimal outcomes for your clients.

Security Administration

In Dynamics 365 for Talent, access is granted to roles and users are assigned to roles. If a user does not have a role assigned, then they do not have access. The roles are aligned with business processes, and administrators assign roles and duties to users. You can also use automatic roles assignment. Role-based access provides for specialization when managing Fixed and Variable plans compensation and the processing of compensation.

Security administration is available through:

- Organization model and hierarchy feature - this is role based. Users' access is dependent on their role in the organization. It is more flexible.
- Legal entities – this is applicable for larger organizations that have multiple companies. Users' access varies from one legal entity to the other. Access is dependent on the user's role in the organization they are assigned in.

Key Roles for Talent Management

Dynamics 365 for Talent delivers solutions that are tailored to three key roles within your organization:

Candidate

Candidates are individuals who are applying for positions in your organization. There are two modular applications (Attract and Onboard) to deliver recruitment and onboarding functionalities. These applications assist in job postings, reviewing applicants' profiles, interviews, job offers and onboarding new hires.

Employees and Managers

Once an employee is hired, there are a variety of tools in Talent including self-service, training, and employee development. Talent's capabilities will help your employees thrive within your organization. For managers, a comprehensive set of tools for performance management allow you to keep close tabs on your employees to help foster growth and development. You can implement approval workflows that keep everyone informed when changes are made through employee self-service.

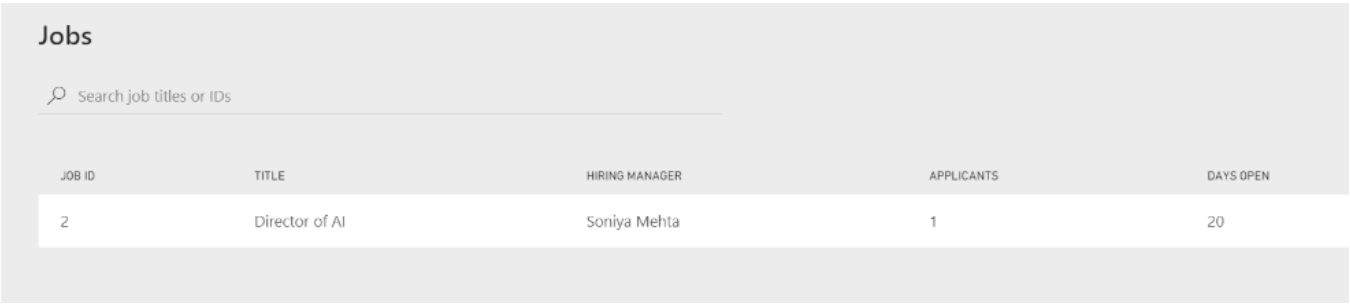
Human Resources Personnel

HR administrators, benefit administrators and recruiters have a variety of tools that are available to enable the HR department to help manage the entire talent experience from the moment a candidate is found to the time they leave your organization. The people analytics tools allow everyone in your organization to get a picture of who, what, when and where in real-time.

Features and Functions

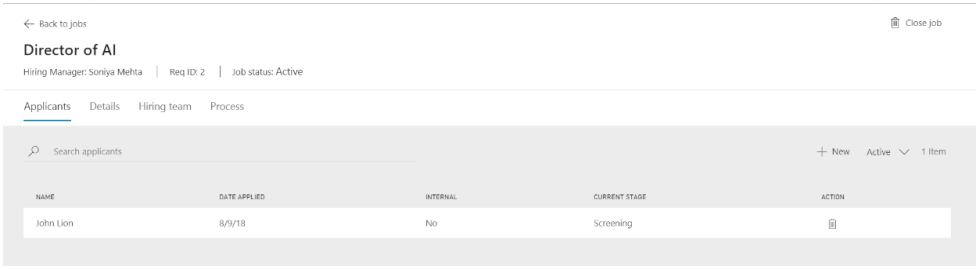
Modular App: Attract

- Enables you to create jobs
- Run the hiring process
- Migrate the applicant to Onboarding
- Open positions created in Core HR are displayed in Attract modular app. As candidates are interviewed, HR professionals can see metrics regarding candidates. Candidates for hire will display in Core HR.
- Recruiters and hiring managers can keep track of applications from candidates, screen candidates, schedule an interview, and give their feedback.
- Recruiters can also make notes, record their personal information and attach documents to the applications.
- Talent also has a configurable hiring process which allows you to create a customized hiring process that fits your business.
- Advanced interview scheduling capabilities offers the ability to manage multiple calendars (internal and external) as well as coping with changes that come up last minute. You can send notifications right within Attract to attendees if there are any changes to the schedule. This saves time for the recruiter by sending less emails during scheduling. All attendees can view each other's availability in real time.
- After the interview, all interviewers can come into a central location (i.e. Attract app) to record their feedback for the candidate. Additionally, each interviewer can view feedback provided by the other interviewers.
- The offer can be made electronically, and the candidate can sign electronically and start the onboarding process.
- Microsoft offers LinkedIn integration; LinkedIn Recruiter is a paid service. Recruiters can now reduce the cost of recruiting by using LinkedIn embedded in the Talent Attract modular app. You can post a job application to LinkedIn and review a candidate's LinkedIn profile right within Attract. LinkedIn Recruiter allows you to see who has applied for the position, whether they are already captured in Talent, and any other potential matches. Candidates that have applied with LinkedIn Recruiter appear within Attract app.

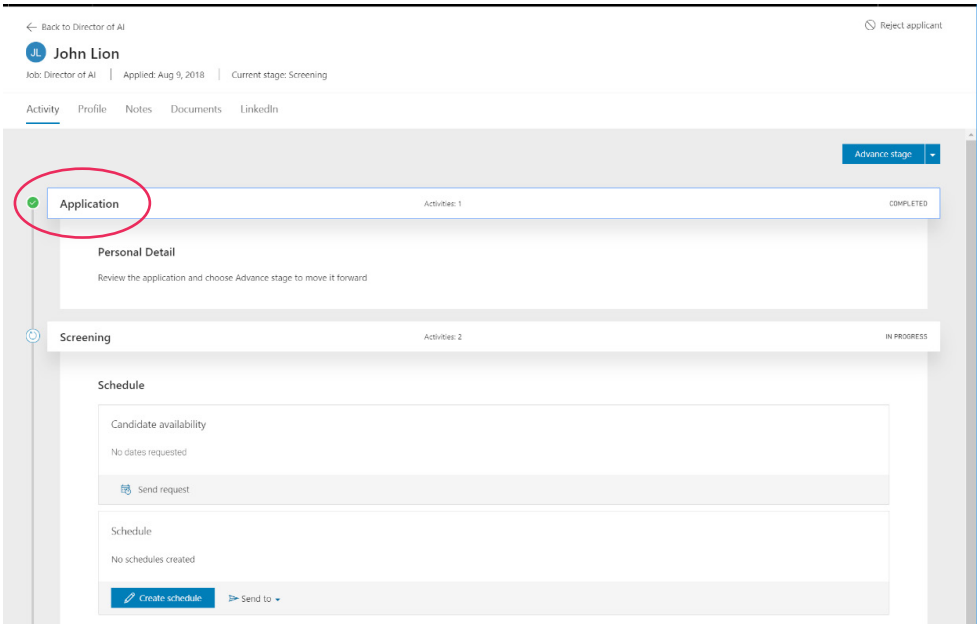


List of active jobs

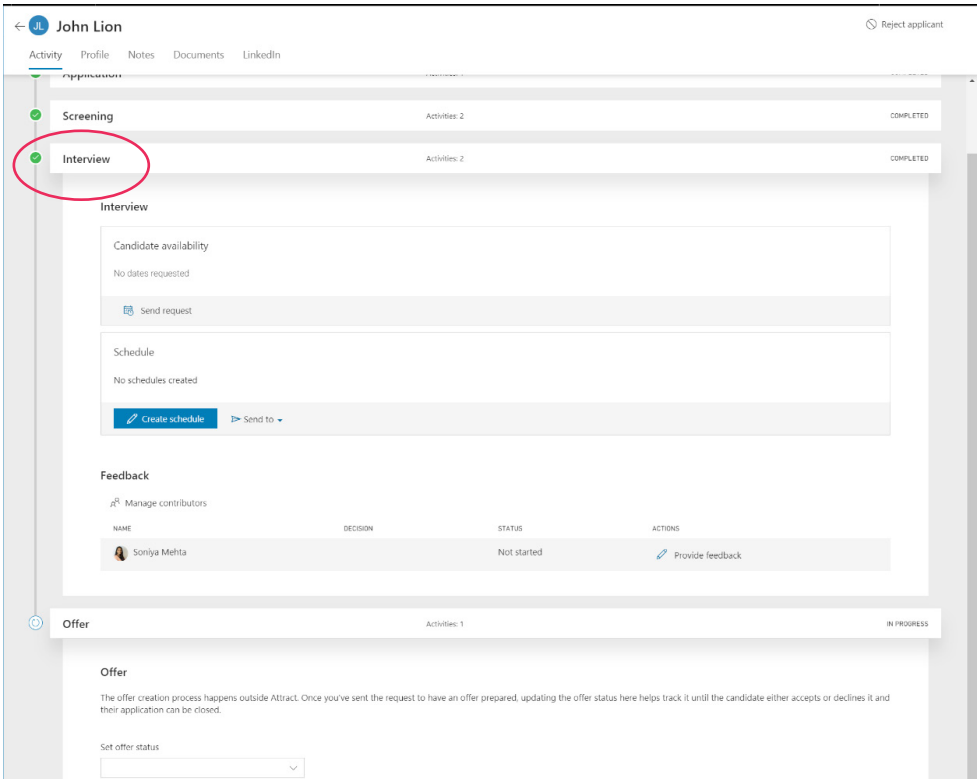
Open job



Candidate in application process



Candidate in interview process



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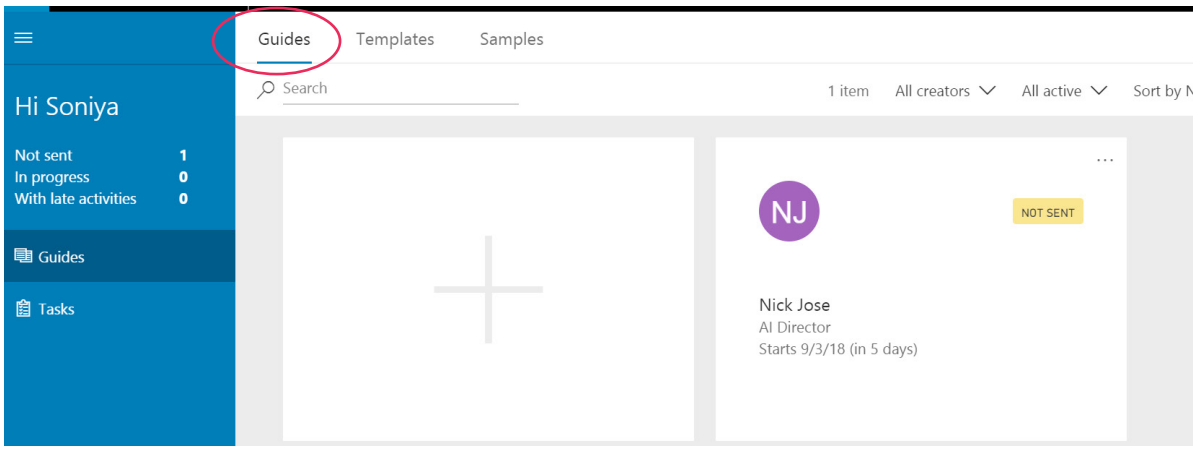
Modular App: Onboard

Onboard is intended to take over where the Attract modular app leaves off. Once an applicant is hired via the Attract experience, they can be migrated to Onboard. New hires can also be created directly in Onboard.

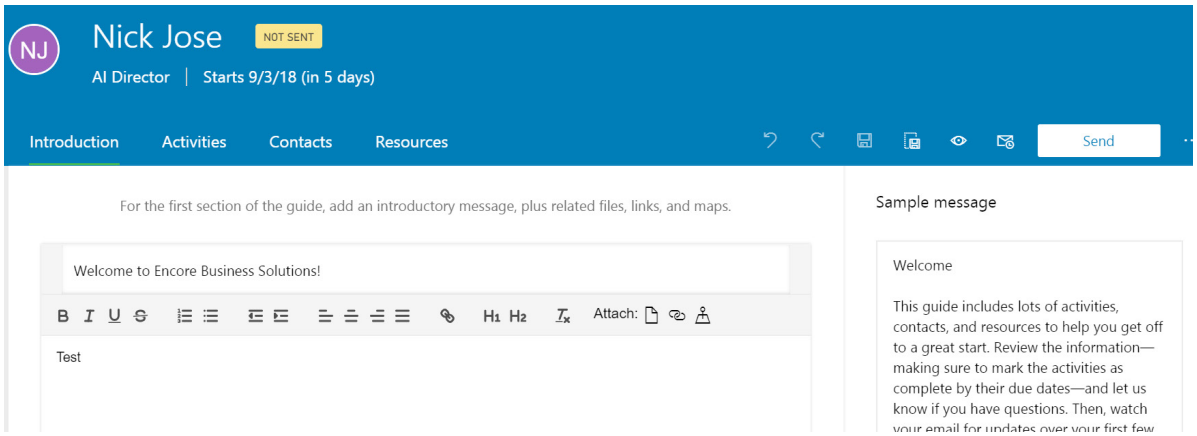
Onboard allows you to drive engagement from the start with personalized onboarding plans for the candidate. Additionally, Onboard allows you to outline important tasks and training, share helpful resources, and help new hires acclimate to their new company. Lastly, Onboard gives the new hires three distinct and useful areas to help them integrate into your company: Activities, Contacts, and Resources, all of which can be accessed from the introduction page for the new hire.

- The Activities section is where a new hire can view onboarding tasks and checklists.
- The Contacts section contains a list of potentially important contacts to the new hire. This can include supervisors, team members, HR representatives, and other people important to the new hire's progression and development.
- The Resources section contains all the electronic documents that the new hire may need. This can include things such as account setup, first-day checklists, or any other necessary electronic documents.

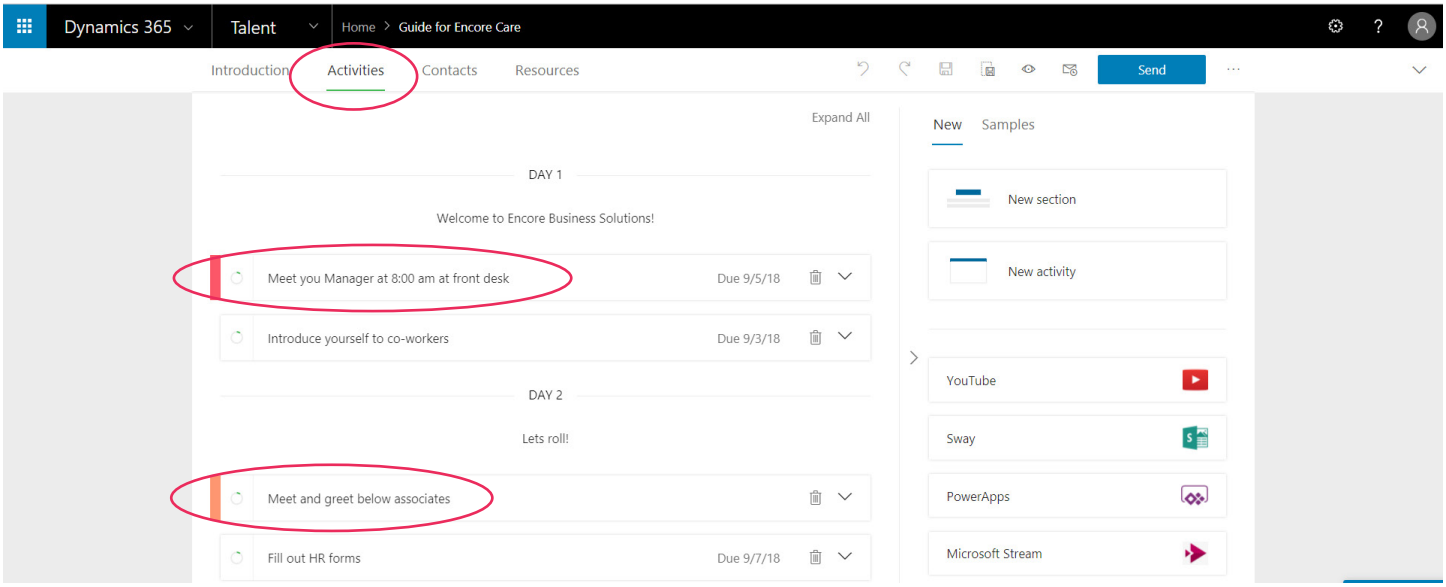
Onboard can not only be used for new hires, but also for employees who join your team/project.



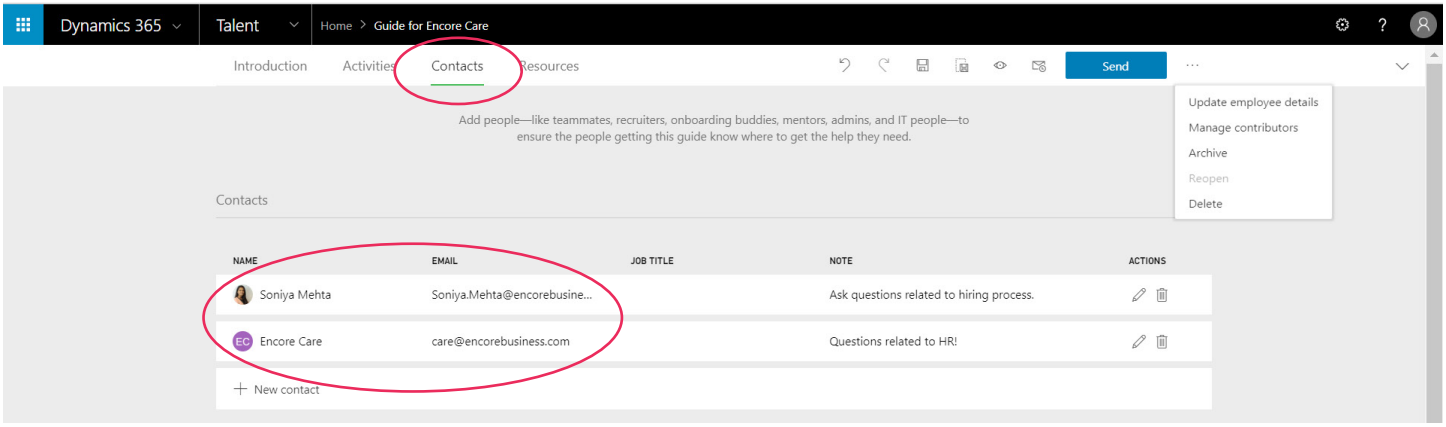
Oboarding guide for new hire



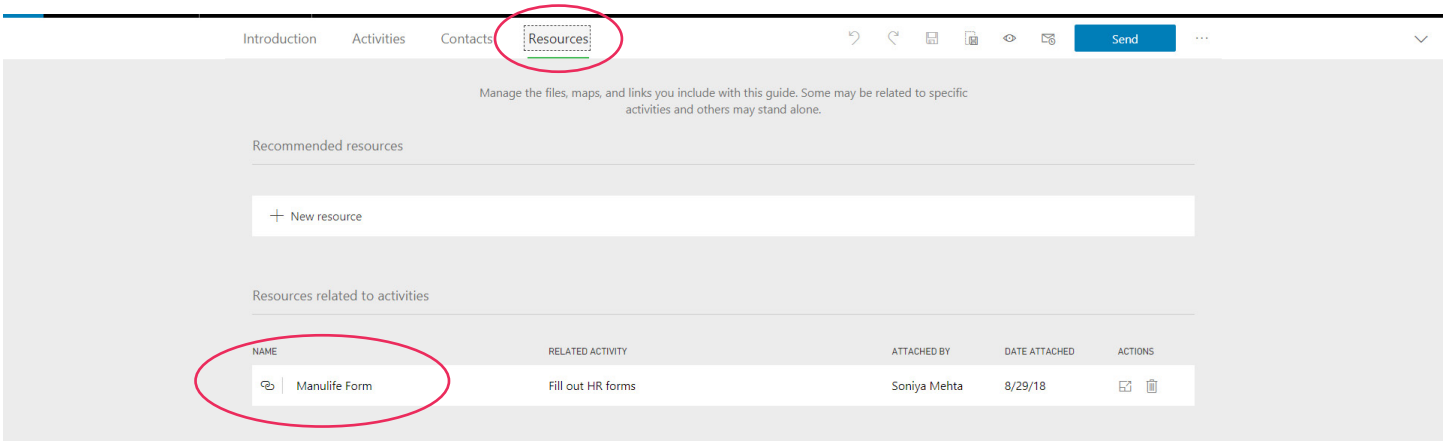
Information sent to new hire



Activities for first days of new position



Important contacts for new hire to reach out to



Forms and links for new hire to review and complete

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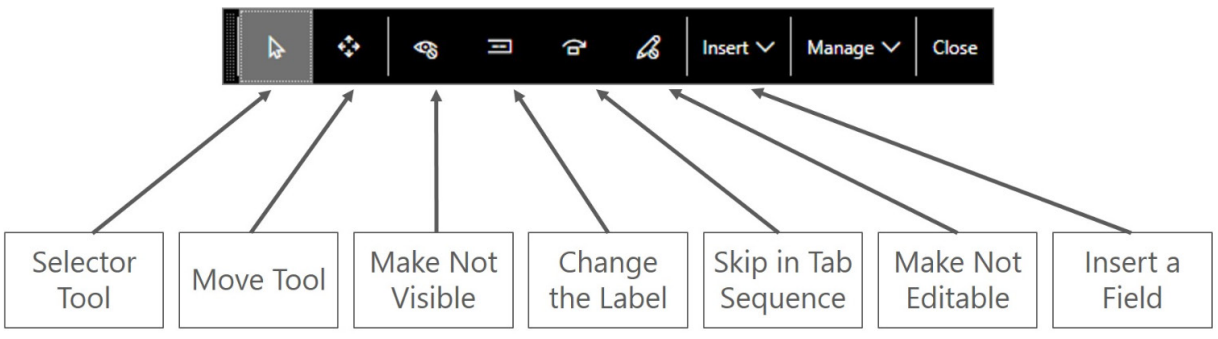
The Technology Behind Talent

- The Common Data Service is the database that is used for the Talent experience.
- The user interface supports two basic extension techniques:
  - Simple UI Configuration – Users can use personalization and configurations within the application to make simple UI updates.
  - PowerApps – For more advanced requirements, you can create PowerApps that can be linked and embedded right into Talent for new functionality.
- Reporting:
  - Power BI – Power BI is the preferred analytical and reporting tool for Dynamics 365. The Dynamics 365 for Talent solution delivers Power reports and dashboards out of the box that can be extended by developers.
  - Excel – Dynamics 365 includes an "Export to Excel" feature that is accessible from any page within the solution.
  - Global Electronic Reporting – The GER is a reporting toolset that allows you to configure reports that are required for statutory reporting. Microsoft delivers many reports and localizations out of the box with this framework.
- Logic:
  - Azure Function - Azure Functions is a solution for easily running small pieces of code, or "functions," in the cloud. Functions can make development even more productive, and you can use your development language of choice.
- Orchestration:
  - Flow - Microsoft Flow is a cloud-based service that makes it practical and simple for line-of-business users to build workflows that automate time-consuming business tasks and processes across applications and services. You can leverage the power of Microsoft Flow to orchestrate the integration of your data from one Dynamics 365 App to another, and to the common data service, among many other sources.

Personalize Talent Management

The Personalization toolbar allows users or administrators to personalize any page in the Talent application. The toolbar includes several buttons that allow you to perform various functions to improve or change the layout to meet your business needs.



(Image credit – Microsoft)

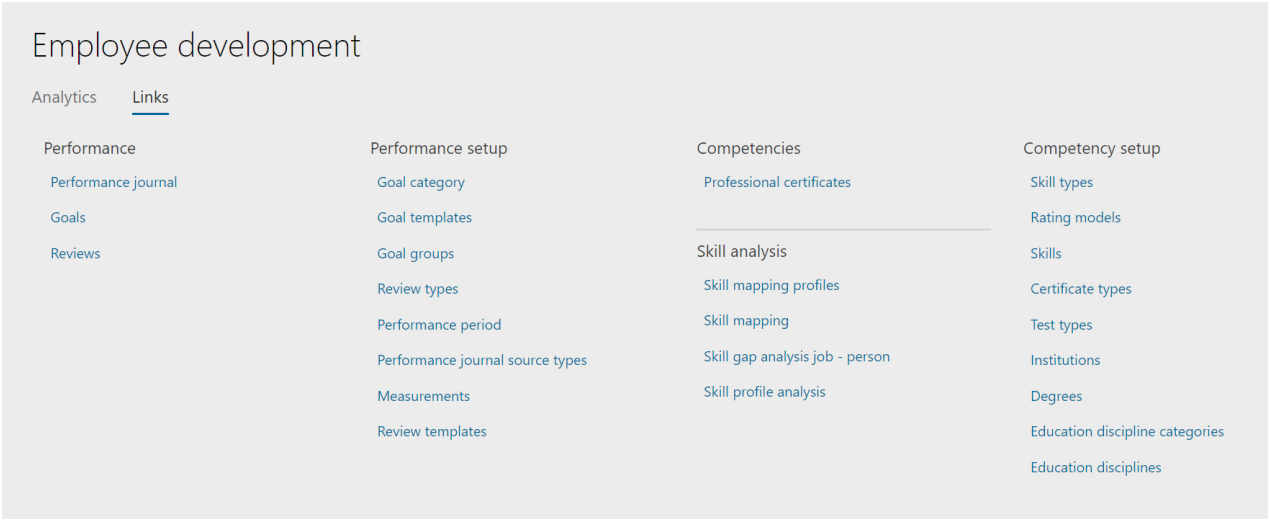
GDPR (General Data Protection Regulation)

Microsoft Dynamics 365 is committed to helping customers meet their GDPR requirements. To learn more: visit this link and click on Microsoft Dynamics 365 for Talent under Unified Operations. Once a new page opens, click on the Dynamics 365 for Talent GDPR White Paper to download the PDF.

Performance Management

Talent offers HR professionals the ability to keep track of performance, something that is very important to managers and organizations. Performance Management offers:

- Performance Journal - As an employee, before you complete your review, you often gather information about activities or events that contributed to your success during a review period. It helps employees keep track of their performance on an ongoing basis. Performance journals aren't required in order to create goals or performance reviews.
- Goals - The performance goals page helps you track the goals that you and your manager have created for you, though goals are not required for performance reviews. Employees can have unlimited goals and goals can span different periods for performance reviews.
- With goal groups, you can assign a goal template to a group and then assign the group to employees, positions, teams, departments or a whole company.
- Goals often have measurable results. You can add measurements to track the target goal results and the actual results.
- Performance reviews are more formally known as discussions. They are now flexible enough to support continuous feedback, development plans and more formal reviews.
- Review templates are used to help you control the behavior of a review. With Review templates, you can ensure reviews follow the same process each time they're performed.
- The Skill-Mapping feature searches across skills, education, certificates, positions of trust and project experience so the returning result matches the criteria entered. For example; it might be useful to know which workers in your organization earned their Master's or PhD in a specific field, so you can assign them relevant tasks and duties.



Workspace to maintain view of employee's performance

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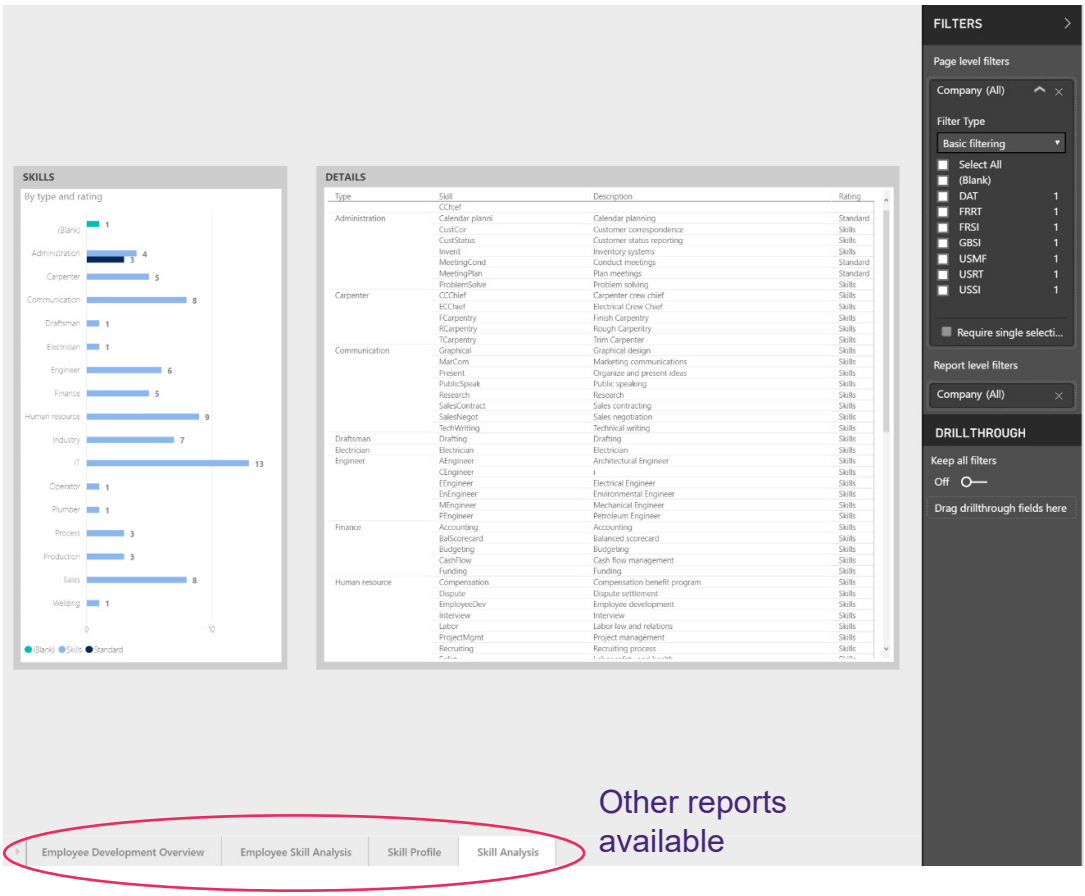

Embedded Power BI report in Employee Development

Other reports available

Benefits Management

- A benefit type, such as medical, contains a set of related benefit plans. A benefit plan is a specific benefit that a provider is contracted to offer. Benefit options are the coverage levels allowed by a benefit plan.
- Workers are eligible for benefits based on rules, or can also bypass eligibility.
- Affordable Care coverage allows you to easily see which employees have been assigned to each coverage group, which employees don't need to be included on a report, and which employees are unassigned. The Benefits Management workspace includes Affordable Care Coverage form 1094-C, 1095-B, and 1095-C.
- You can assign mass benefit expiration, mass enrollments and mass update benefit rates. Lastly, the Benefits workspace also has rich power BI reports.

Benefit management workspace

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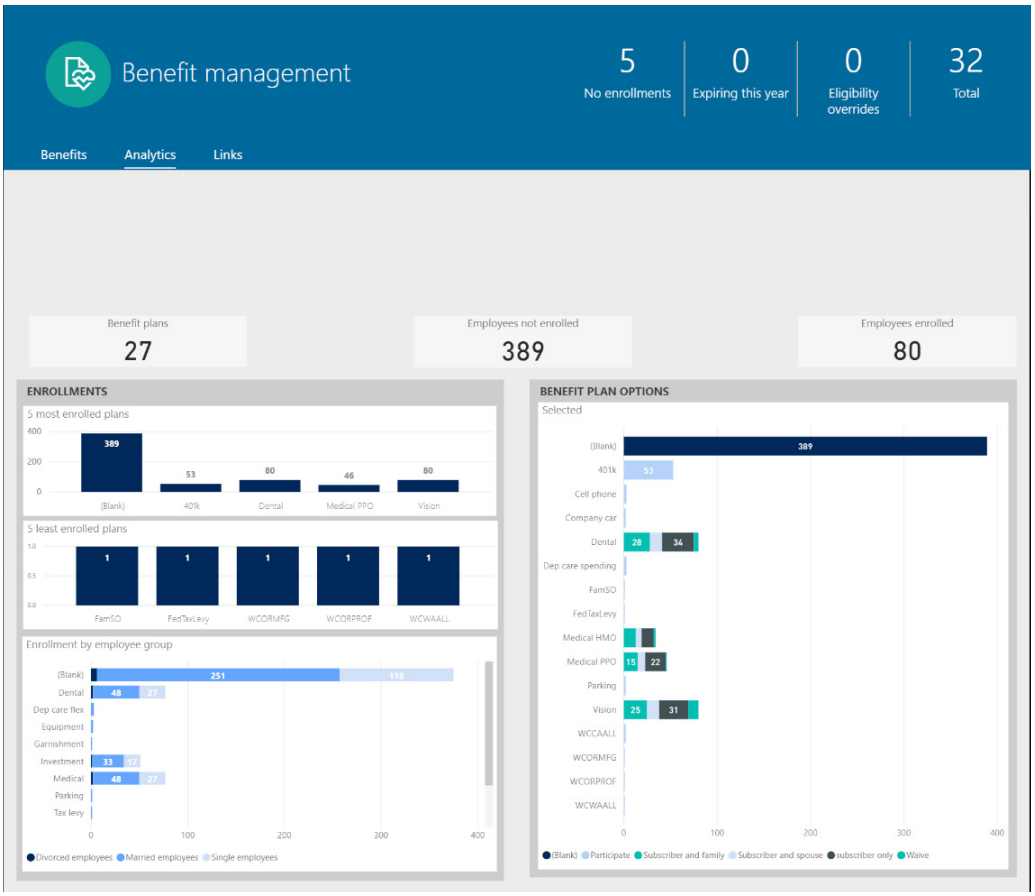
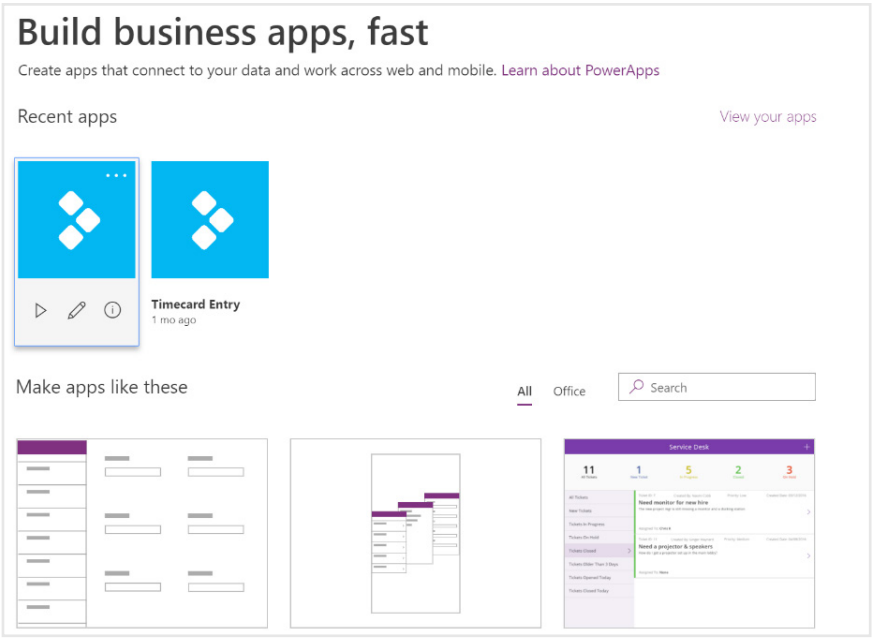


Embedded Power BI report in Benefit management workspace

PowerApps

In order to use PowerApps, a user needs a separate login and a license for this application. PowerApps is a low code platform service for rapidly building web and mobile Apps. PowerApps is cloud-based and offers easy integrations. Data connections are available to all Microsoft products.



PowerApps homepage

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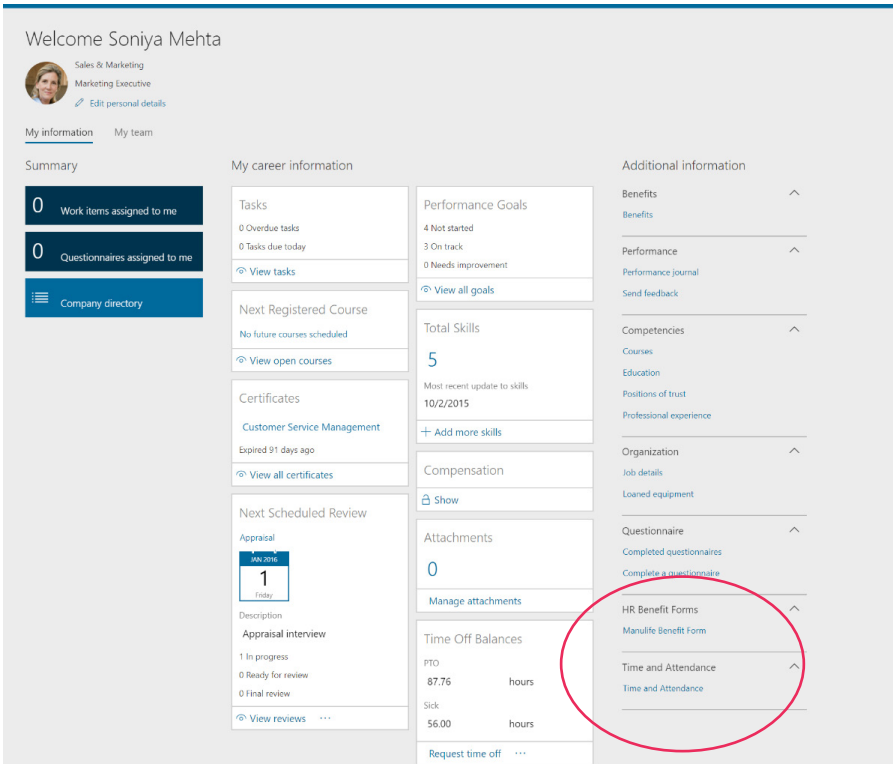
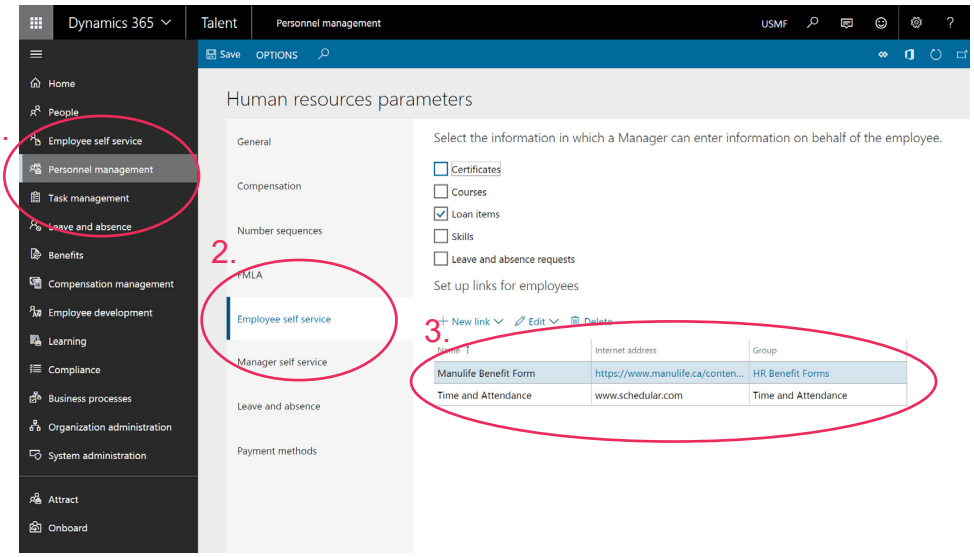
Embed External URL

This feature enables a one stop shop solution for employees. In the screenshot below, see a real-life scenario to embed a third-party website link to Employee self-service. This is also an example of customization. This can be accomplished under the Human Resources parameters in the Personnel Management workspace. You can embed a link to your Group benefit and retirement plan provider, time and attendance site or expense tracking system. When employees click on the link; a new browser tab will open and direct the employee to that site. Similarly, you can use this feature to share OneDrive files, SharePoint files, the company web site, benefits forms and so on.



Personalize employee self service workspace



Steps to personalizing

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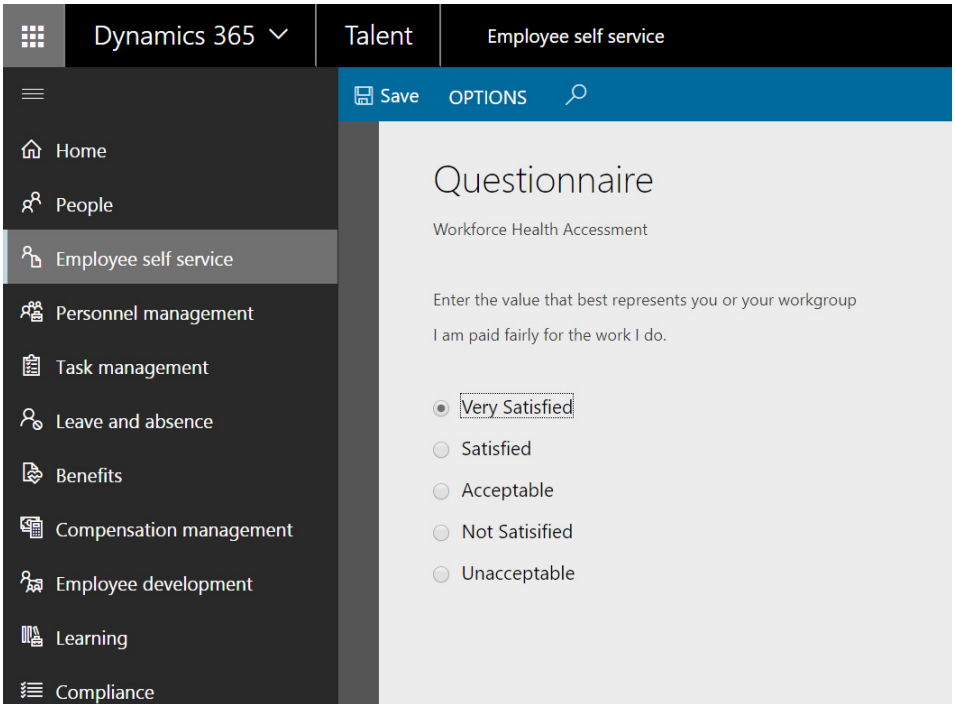
Date Effective Data

Often you are required to update a worker's record. You can use Version Control to define when these changes take effect and when old versions expire. Version Control, sometimes referred as Date Manager, is used throughout Dynamics 365. After you are familiar with setting effective dates for new versions of a record, you can maintain several versions for many types of records in Talent.

Questionnaire

Gather important information using questionnaires. Questionnaires are targeted only to an internal audience, as the individual must have access to employee self-service in order to answer the questionnaire. You can design and administer questionnaires to gather information that's used for a variety of purposes. The Questionnaire feature lets you design and create questionnaires that can be distributed broadly or to a specific set of respondents to complete. After the respondents provide their answers, you can review and analyze the results.



Employees fill out questionnaires or assessments within Employee self service

Data Connectors

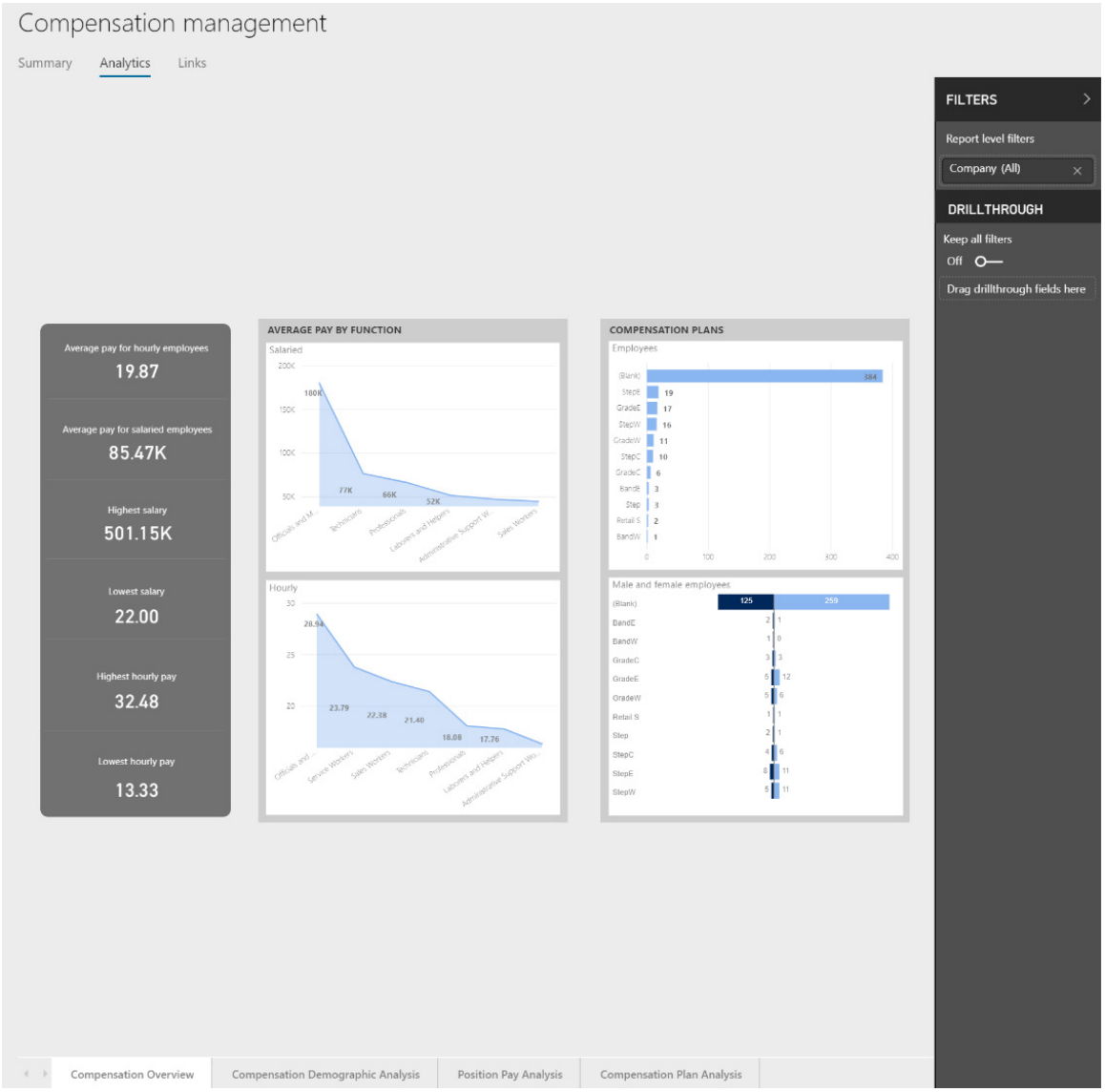
With using the Excel integration in Talent, users can export information to excel, make changes and publish them back to the Talent application. Microsoft Office integration capabilities provide users with a productive environment that helps them get the job done by using Office products.

Analyzing Your Data and Power BI

Embedded Power BI is a Microsoft Azure service that enables ISVs and app developers to surface Power BI data experiences within their applications. With Power BI Embedded, developers can deliver always-up-to-date views with Direct Query.

Talent delivers rich, interactive reports that are seamlessly integrated into application workspaces. By using graphics and visuals supported by Power BI, workspaces can provide a highly visual and interactive experience for users.

Users can filter these reports based on information required and help management make sound decisions.



Embedded Power BI in Compensation management workspace

How Much Does it Cost?

Dynamics 365 for Talent	Dynamics 365 for Talent: Modular Apps	Dynamics 365 for Talent: Unified Operations Plan
Full User: $40USD/user/month Team User: $8USD/user/month $48.64CAD/user/month	Full User: $8USD/user/month (or $12USD per user, per month if two modular apps are licensed together) $9.70CAD/user/month	Full User: $190USD/user/month Team User: $8USD/user/month $231.03CAD/user/month

Always talk to your Partner about the most current pricing.

Please feel free to connect with us if you have any questions about Dynamics 365 for Talent

Microsoft is heavily investing in Talent and there are updates released each month. For the latest information on Dynamics 365 for Talent please visit these sites:

Latest Release Notes

Document Site

Talent Application Overview And Pricing

Encore Business Solutions is a Microsoft Gold Certified Partner with offices throughout Western Canada and the Pacific Northwest. We offer consulting services that focus on the implementation, integration, and support of Microsoft technologies. The products we work with encompass Microsoft Dynamics, Microsoft Office, and the Microsoft Cloud.

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