



# Hire to Retire Business Process Overview in Dynamics 365 Human Resources

## Presenters:

Ruchi Sharma, Sr FastTrack Solutions Architect

Edison Lai, Sr Program Manager

Priyanka Sinha, Sr Customer Solutions Architect

Alexandra Socea, Program Manager



# Agenda

- Hire to retire overview
- Business process areas
  - Hire to retire end-to-end process
  - Use case and Demo
- Resources
- Roadmap

# Hire to retire overview



**Presenter:**  
**Ruchi Sharma, Sr FastTrack  
Solutions Architect**

# Human Resource | Transforming Hire to Retire

Leading the way to autonomous ERP

Dynamics 365 Human Resource



Finance



Supply Chain



Commerce



Human Resources



Project Operations



Business Performance Planning, Business Performance Analytics, Business Performance Insights

E2E Business Processes

Common Data and Analytics Foundation

Modular and Extensible

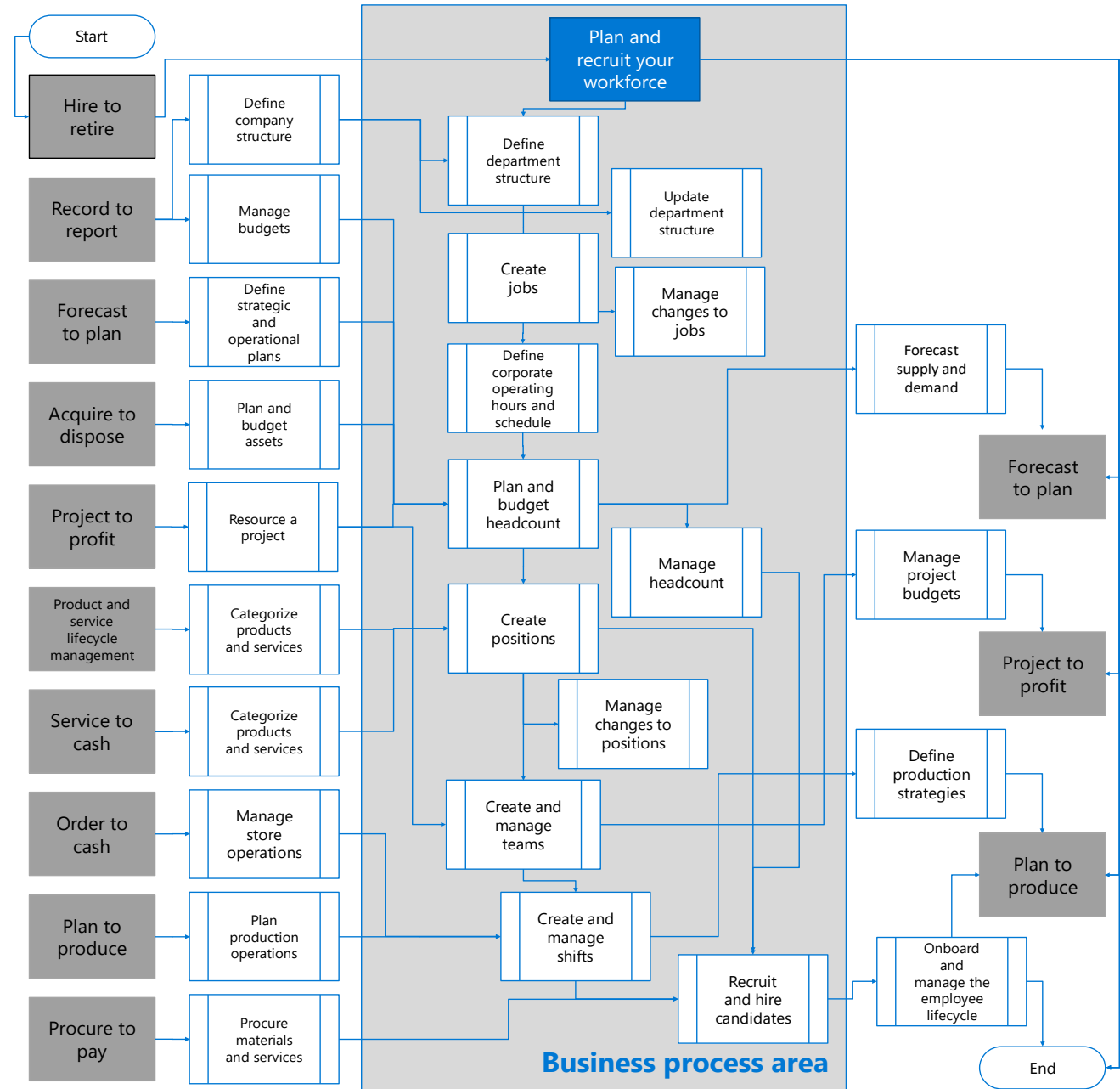


Use case 1:

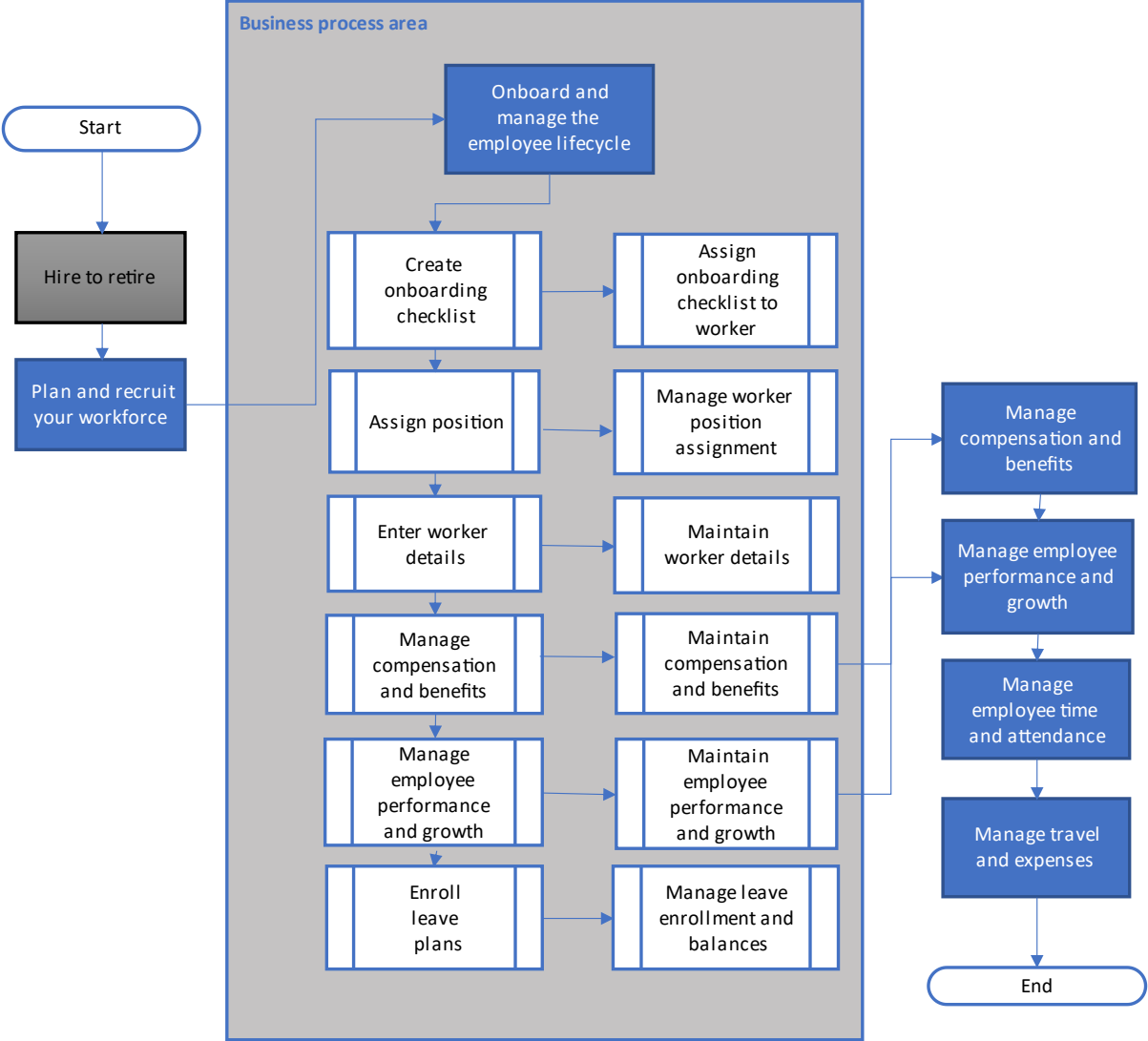
Plan and Recruit Workforce  
and Onboard and manage  
the employee lifecycle



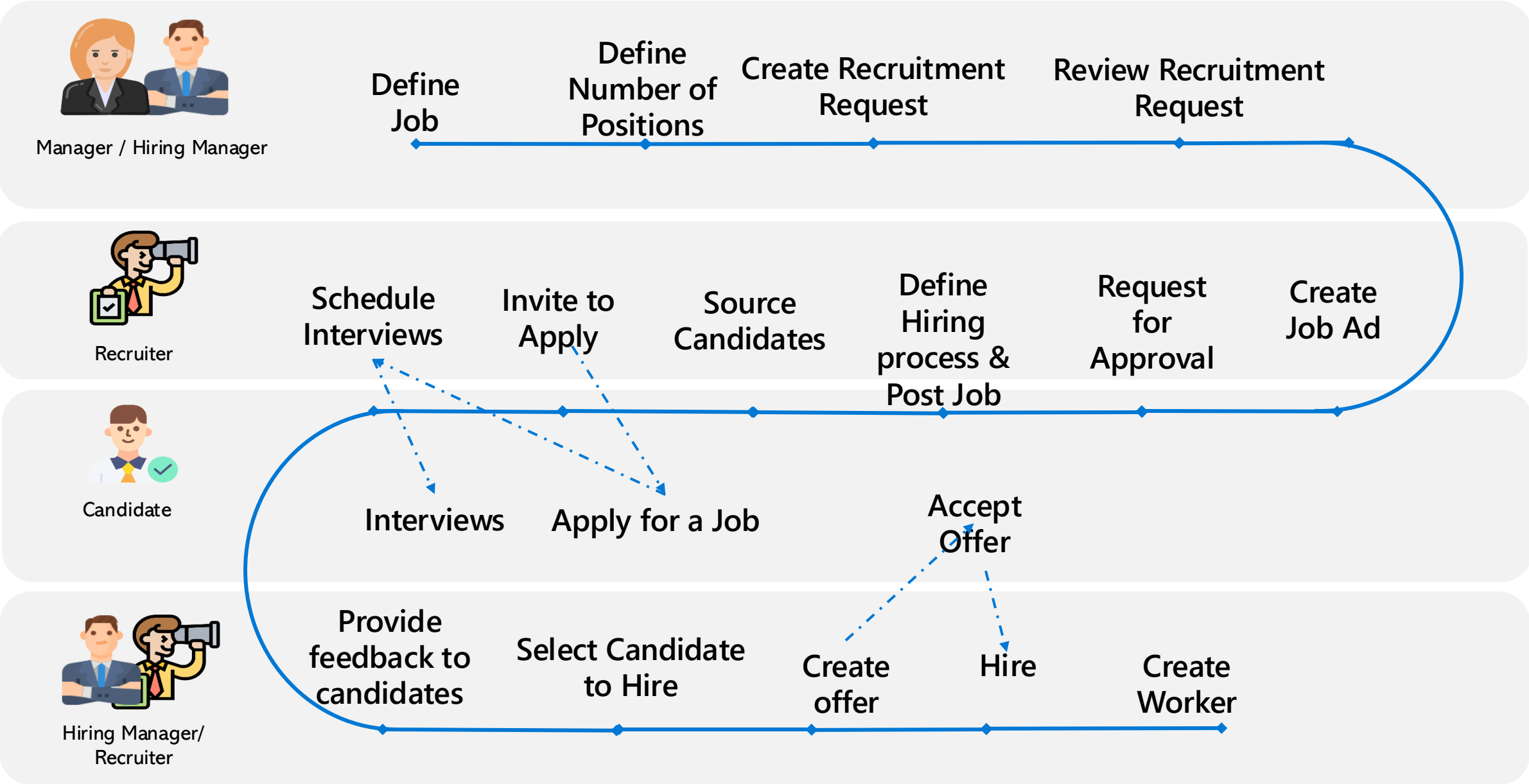
# Plan and recruit your workforce



# Onboard and manage the employee lifecycle



# Scenarios of use case:



# Demo – Hiring Team/Recruiter Persona

# Contoso Entertainment System USA


Search people ...

Business performance analytics (preview)

Opens the Business performance analytics (preview) app in Dataverse


< September 2024 >

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
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 Business performance analytics (preview)


 Copilot for Finance (Preview)

 Invoice capture


 Business performance planning

 Demand planning

### WORKSPACES


 Bank management


 Data validation checklist

 Product readiness for discrete manufacturing

All bank statements

Open bank reconciliations 0

 Distributed order management

 Product readiness for process manufacturing

### Work items assigned to me

Cash advance request : Record returned

Expense reports : Record returned

Catalog : catalog approval

# Demo – Careers

Welcome to Contoso Career!

Join the innovation frontline  
where your ideas propel the  
future.

Sign In



## Introduction section

Create a short paragraph that shows your target audience a clear benefit to them if they continue past this point and offer direction about the next steps

# Demo –Recruiter Persona/Application Review

← Focused view Show Chart + New Refresh Export to Excel |

Edit columns Edit filters Filter by keyword

Job Ads

Job ID	Title	Company	Job ad status	Hiring manager	Recruiter	Created By	Created On
JOB-1069	Engineering Manager	USMF	Draft			Julia Funderburk (Offline)	9/6/2024 8:22 PM
JOB-1068	Acct. Mgr.	USMF	Draft	Charlie Herb (Offline)	Robin Wood (Offline)	Julia Funderburk (Offline)	9/6/2024 1:51 PM
JOB-1067	Account Manager	CNMF	Active	Charlie Herb (Offline)	Robin Wood (Offline)	Julia Funderburk (Offline)	9/5/2024 12:56 PM
JOB-1066	HR Assistant	CNMF	Active	Charlie Herb (Offline)	Indra admin (Offline)	Julia Funderburk (Offline)	9/5/2024 12:40 PM
JOB-1065	Test account manager	dat	Active	Charlie Herb (Offline)	Robin Wood (Offline)	user # (Offline)	9/4/2024 10:50 AM
JOB-1064	Account Manager	dat	Active	Charlie Herb (Offline)	Robin Wood (Offline)	Julia Funderburk (Offline)	8/28/2024 1:02 PM
JOB-1063	Account Manager	USMF	Active	Charlie Herb (Offline)	Robin Wood (Offline)	Julia Funderburk (Offline)	8/14/2024 4:41 PM
JOB-1061	Account Manager	DEMF	Active	Charlie Herb (Offline)	Robin Wood (Offline)	Julia Funderburk (Offline)	8/9/2024 5:58 PM
JOB-1060	Senior Designer	USMF	Draft			Robin Wood (Offline)	8/8/2024 7:56 PM
JOB-1059	Account Manager	USMF	Active	Charlie Herb (Offline)	Robin Wood (Offline)	Julia Funderburk (Offline)	8/8/2024 7:06 PM
JOB-1058	Dynamics 365 Solution Architect	USMF	Complete	Charlie Herb (Offline)	Robin Wood (Offline)	Julia Funderburk (Offline)	7/31/2024 12:37 AM
JOB-1057	HR Manager	USMF	Draft			Robin Wood (Offline)	7/26/2024 3:16 PM
JOB-1056	Test	dat	In Progress	Charlie Herb (Offline)	Robin Wood (Offline)	Robin Wood (Offline)	7/24/2024 8:49 PM
JOB-1055	testing 3	USMF	Draft	Charlie Herb (Offline)	Robin Wood (Offline)	Robin Wood (Offline)	7/23/2024 6:31 PM
JOB-1054	jj	dat	Active	Charlie Herb (Offline)	Robin Wood (Offline)	Indra admin (Offline)	7/17/2024 10:34 AM
JOB-1053	Senior Consultant	USMF	Draft			Julia Funderburk (Offline)	7/17/2024 7:21 AM
JOB-1051	Functional Consultant	USMF	Active	Charlie Herb (Offline)	Robin Wood (Offline)	Julia Funderburk (Offline)	7/17/2024 6:45 AM
JOB-1050	software	dat	Active	Charlie Herb (Offline)	Robin Wood (Offline)	Indra admin (Offline)	7/16/2024 2:00 PM
JOB-1048	Senior Cloud Solution Architect	USMF	Active	Charlie Herb (Offline)	Robin Wood (Offline)	Robin Wood (Offline)	7/15/2024 2:04 PM
JOB-1047	Consultant	USMF	Draft			Robin Wood (Offline)	7/13/2024 12:41 AM
JOB-1046	Testing recruiter created job title in...	USMF	Draft	Charlie Herb (Offline)	Robin Wood (Offline)	Robin Wood (Offline)	7/13/2024 12:09 AM
JOB-1045	Account Manager	USMF	Draft	Charlie Herb (Offline)	Robin Wood (Offline)	Julia Funderburk (Offline)	7/12/2024 4:48 PM
JOB-1044	Tester	dat	Active	Charlie Herb (Offline)	Robin Wood (Offline)	Indra admin (Offline)	7/12/2024 2:12 PM
JOB-1043	Account Manager	USMF	Active	Charlie Herb (Offline)	Robin Wood (Offline)	Julia Funderburk (Offline)	7/12/2024 1:01 PM
JOB-1042	Account Manger	dat	Active	Charlie Herb (Offline)	Robin Wood (Offline)	Julia Funderburk (Offline)	7/11/2024 7:53 PM
JOB-1041	test	USMF	In Progress	# Carole Poland (Offline)	# Robin Counts (Offline)	Robin Wood (Offline)	7/11/2024 3:30 PM

# Use case 2: Managing Employee

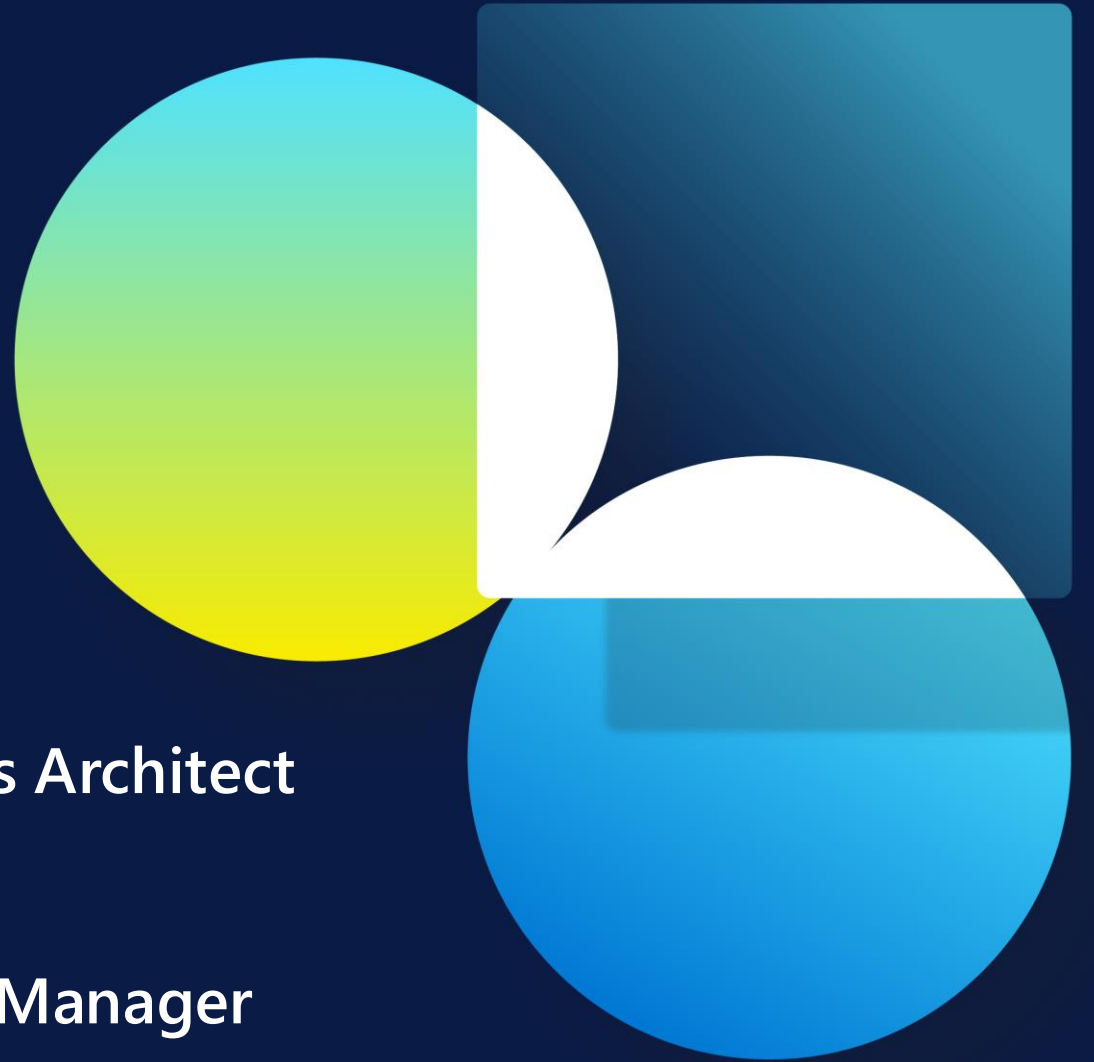


**Presenters:**

**Priyanka Sinha, Sr Solutions Architect**

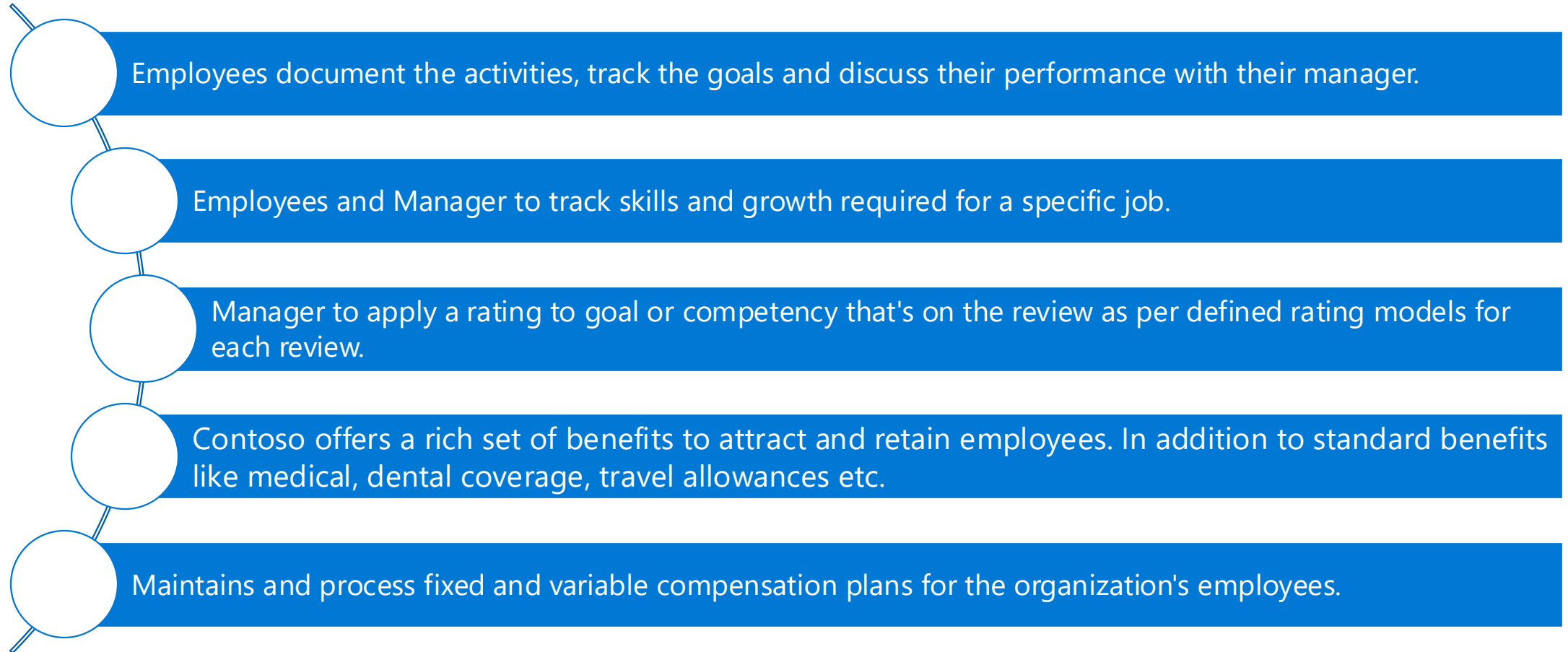


**Alexandra Socea, Program Manager**

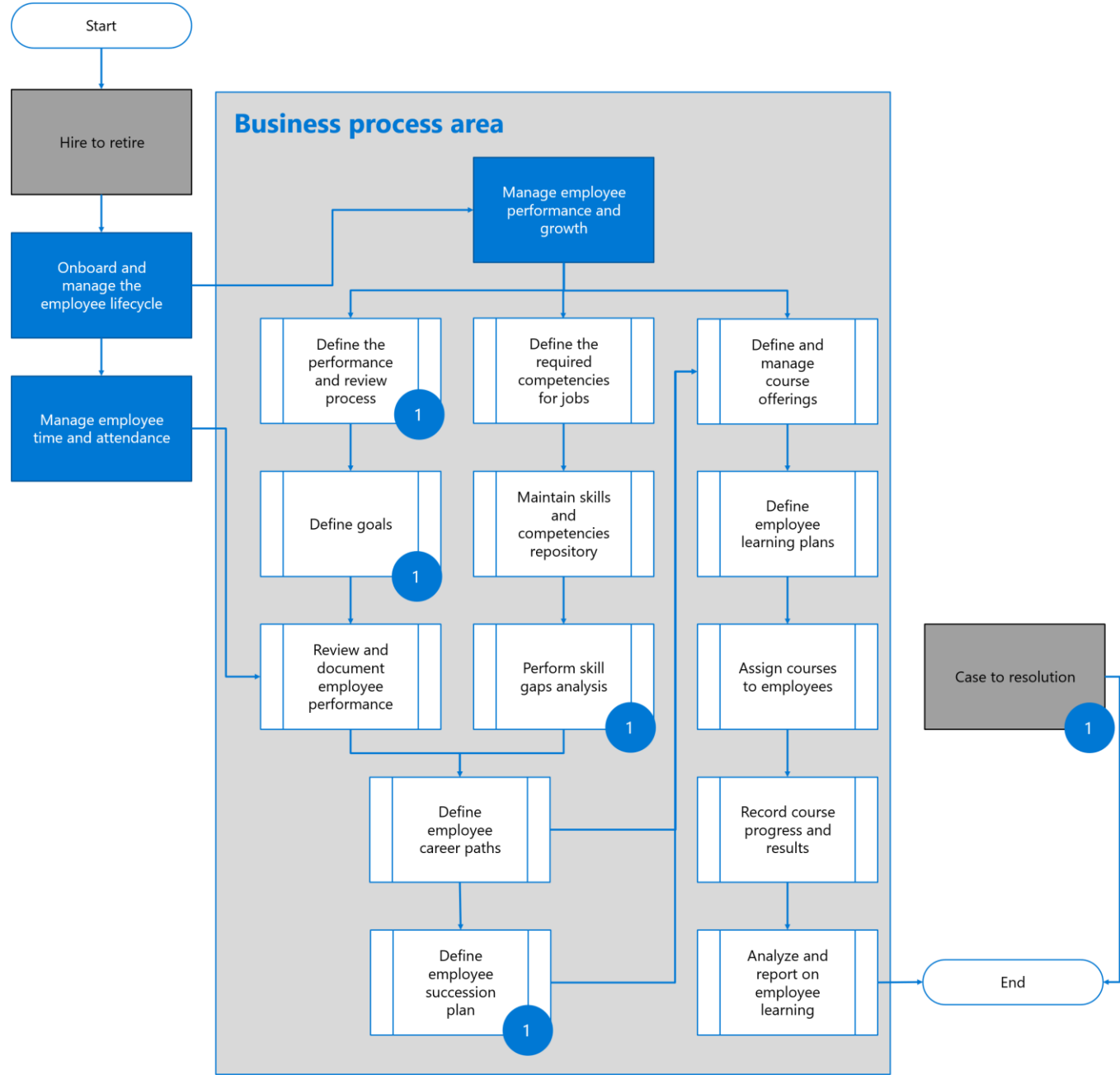


# Scenarios of use case:

Contoso has 7k employees, they need to manage employee's performance and benefits.



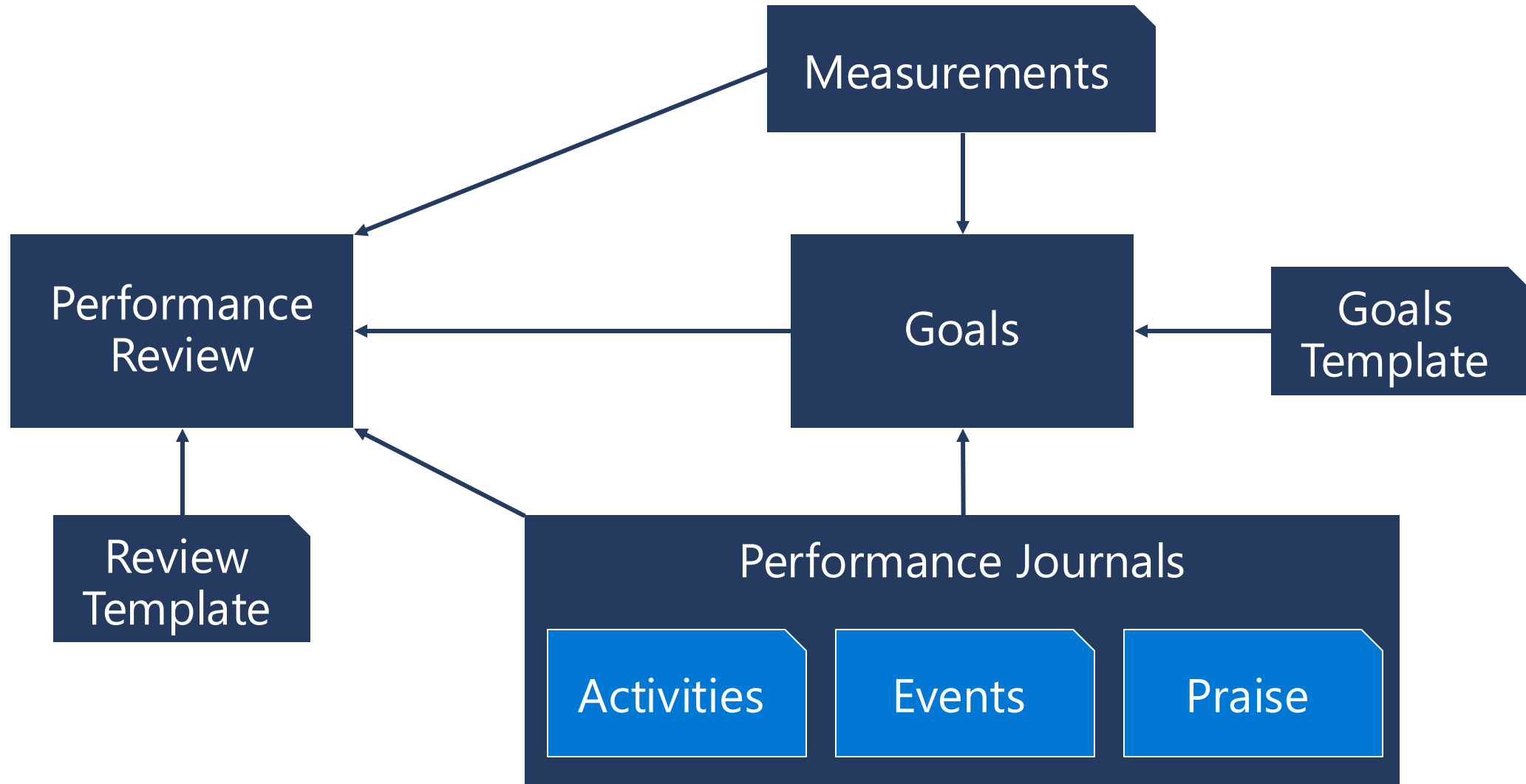
# Manage employee performance and growth



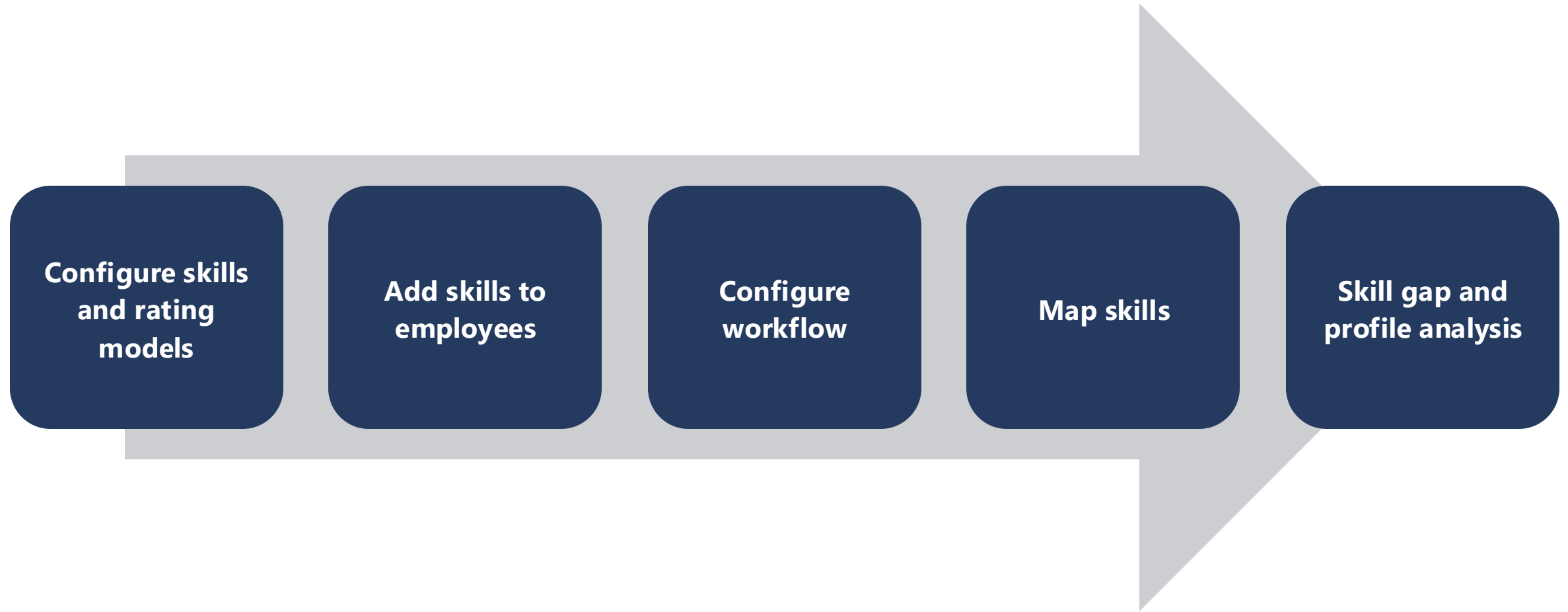
# Manage employee performance and growth : Setup and Configuration

- GOAL CATEGORY
- GOAL TEMPLATES
- GOAL GROUPS
- REVIEW TYPES
- PERFORMANCE PERIOD
- PERFORMANCE JOURNAL SOURCE TYPES
- REVIEW TEMPLATES
- SKILL TYPES
- SKILLS
- RATING MODELS
- CERTIFICATE TYPES
- TEST TYPES
- INSTITUTIONS AND DEGREES
- EDUCATION DISCIPLINES AND CATEGORIES
- COURSE TYPES
- COURSE LOCATIONS
- INSTRUCTORS
- CLASSROOMS AND GROUPS
- COURSE GROUPS

# Performance Management Process



# Manage Skills



**Demo – Employee performance and growth**



Options



Julia Funderburk 000020
Marketing Executive • Sales & Marketing • Employee
Contoso Entertainment System USA • +4
Edit personal details

18.2 Years of service
Charlie Carson Reports to
Full-time Position type

My information My team

Summary by Copilot

Summary

Work items assigned to me
Questionnaires assigned to me
Company directory
Open jobs
Team absence calendar

My career information

Time Off Balances: PTO 87.76 Hours, Sick 56.00 Hours
Expenses: Unattached expenses, Unattached receipts
Timesheets: No timesheets found for the current period
Tasks: 0 Overdue tasks, 0 Tasks due today
Next Registered Course: No future courses scheduled
Certificates: Customer Service Management
Next Scheduled Review: Appraisal JAN 2017
Performance Goals: 4 Not started, 4 On track, 0 Needs improvement
Total Skills: 5
Compensation, Attachments, Pay Statements

Additional information

BENEFITS

Benefits

EXPENSES

Cash advances

Expense entry delegates

TIME MANAGEMENT

Timesheets

Timesheets for my review

Delegates

Favorites

PERFORMANCE

Performance journal

Send feedback

COMPETENCIES

Completed courses

Education

Positions of trust

Professional experience

Project experience

ORGANIZATION

Job details

Loaned equipment

Signing limits

QUESTIONNAIRE

Completed questionnaires

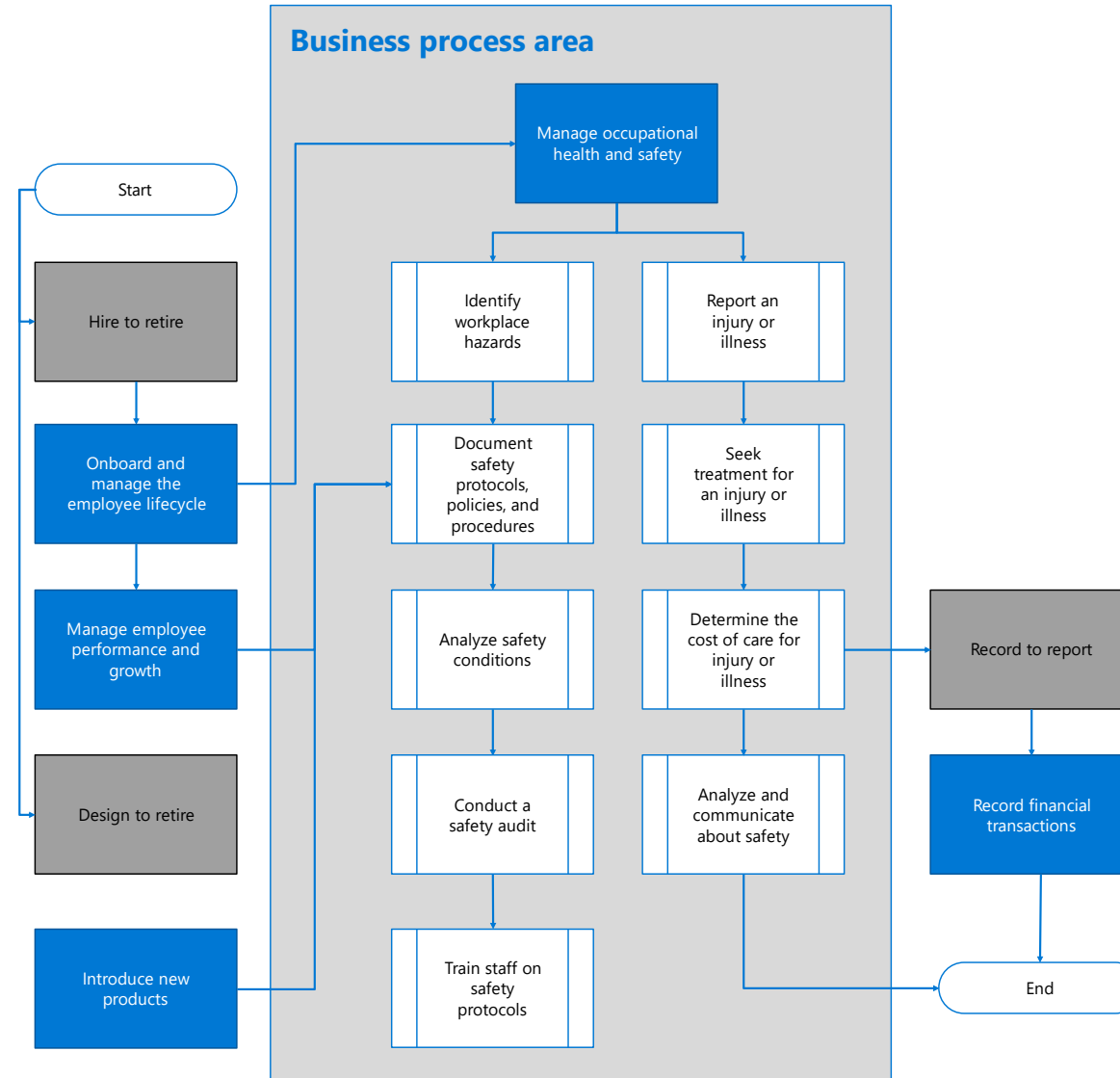
Complete a questionnaire



# Manage worker compensation, benefits, and payroll

- CREATE BENEFIT PLANS
- DEFINE ELIGIBILITY RULES
- CONFIGURE BUNDLES, PERIODS, AND PROGRAMS
- DEFINE PERSONAL CONTACT ELIGIBILITY
- CONFIGURE BENEFIT PERIODS
- CREATE COVERAGE OPTIONS AND PLAN TYPES
- DEFINE PAYMENT FREQUENCIES
- DEFINE PLAN TYPE OPTIONS
- DEFINE WAITING DAYS, PERIODS, AND ROUNDING RULES
- CONFIGURE TIERS, RATES, AND DEDUCTIONS
- CONFIGURE PRORATE FORMULA
- CREATE LIFE EVENT TYPES
- CONFIGURE LIFE EVENTS
- CONFIGURE LIFE EVENT PROCESSING
- ELIGIBILITY RULES
- PAY RATE CONVERSIONS
- COMPENSATION GRIDS
- REFERENCE POINT
- COMPENSATION ACTIONS
- FIXED PLAN SETUP
- DEFINE TYPES (CASH/NO-CASH)
- VESTING RULES
- VARIABLE PLAN SETUP

# Manage occupational health and safety overview



# Demo – Compensation, benefits, and payroll

Navigation menu: Work, Person, Leave, **Compensation**, Payroll, Benefits, Compliance, Time, Project, Commerce, General, Expense, Options

Employee compensation: Fixed plan, Variable plan awards, Variable plan enrollment, Total compensation statement, Performance

Bank accounts: Bank accounts, Bank account disbursements

Labor unions: Labor unions

Commission: Commission transactions, Sales groups

Workers (Active, Pending, Exited, All legal entities) | Standard view

**Johnson Alexander** 001313  
Sales Associate - USA West • Retail Operations • Employee  
Contoso Entertainment System USA

0.0 Years of service | Mike Danseglio Reports to | Full-time Position type

[Email] [Phone] [Chat]

Profile | Work history | **Positions** | Commerce | Time registration | Links

+ Add assignment | Edit assignment | End assignment

Status	Position	Description	Primary position	Assignment start	Assignment end	Reason code	Months in posi...
Active	000134	Sales Associate	Yes	1/1/2025	Never		0

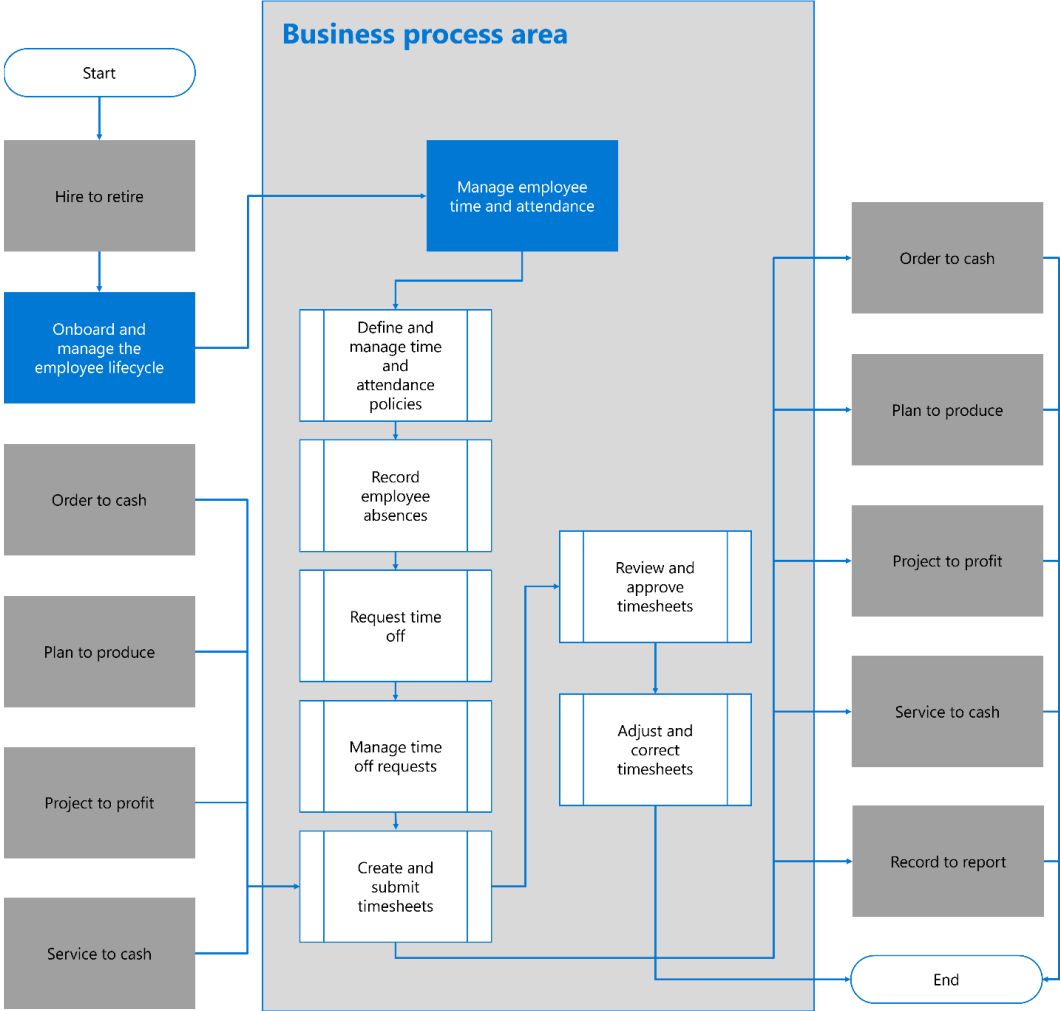
## Use case 3: Employee self serve



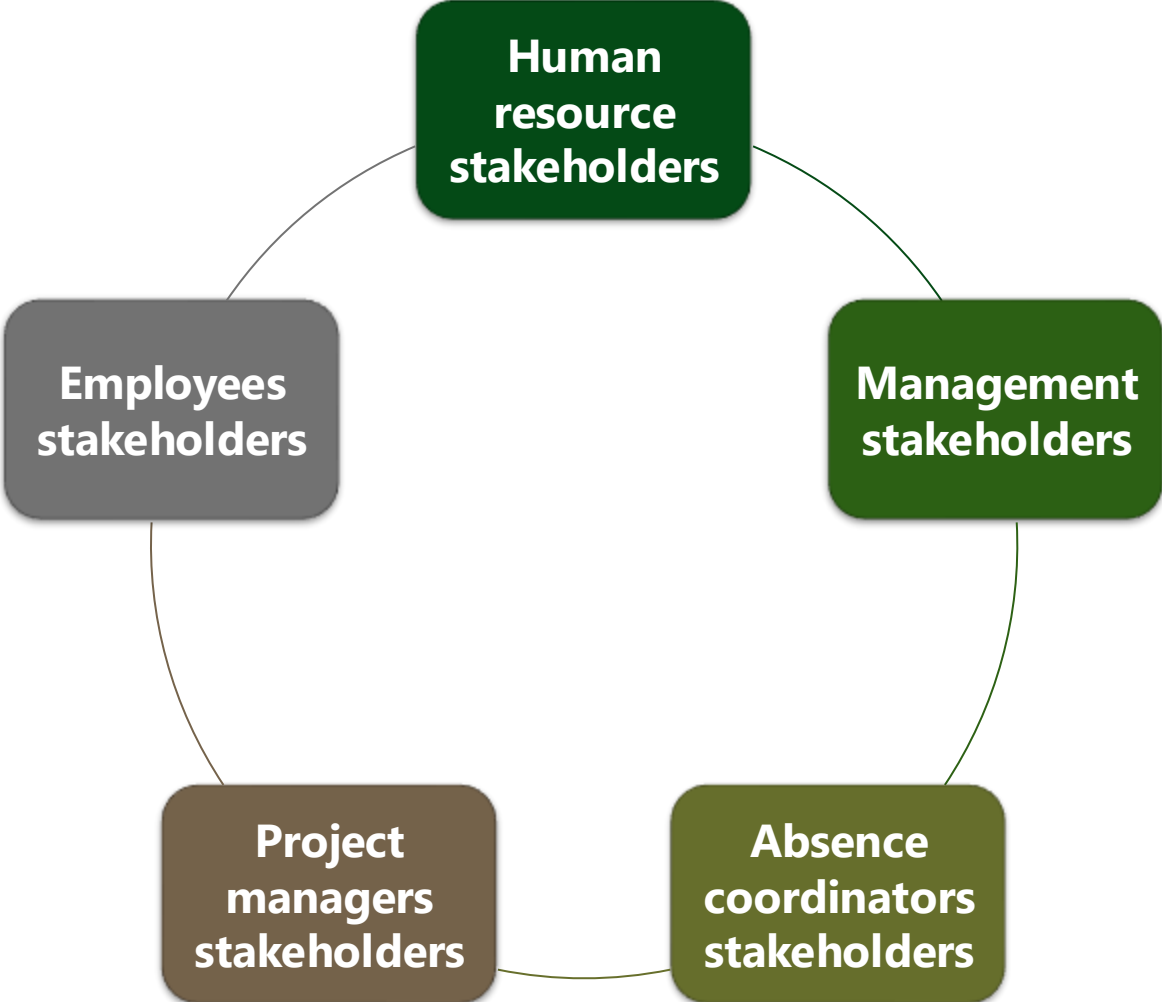
**Presenters:**  
Edison Lai, Sr Program  
Manager



# Manage employee time and attendance process flow



# Stakeholders



# Basic configurations

Basic Configurations in employee time and attendance

## **1.Calculation and approval groups for time and attendance:**

- Expense categories
- Payment methods

## **2.Absence information:**

- Create absence setups
- Create an absence setup
- Create absence groups
- Create absence codes
  - Create an absence code
  - Validation rules to an absence code

## **3.Specify a color for open absence transactions (optional)**

Demo – Request time off



# Contoso Entertainment System USA

Search people

< January 2025 >

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

- Work Items assigned to me
- Cash advance request : Record ret...
  - Expense reports : Record returned
  - Catalog : catalog approval
  - Expense reports : Expense report a...
  - Cash advance request : Cash advan...
  - Approve travel requisition
  - Catalog : catalog approval

To-do list

You're all caught up on your tasks.

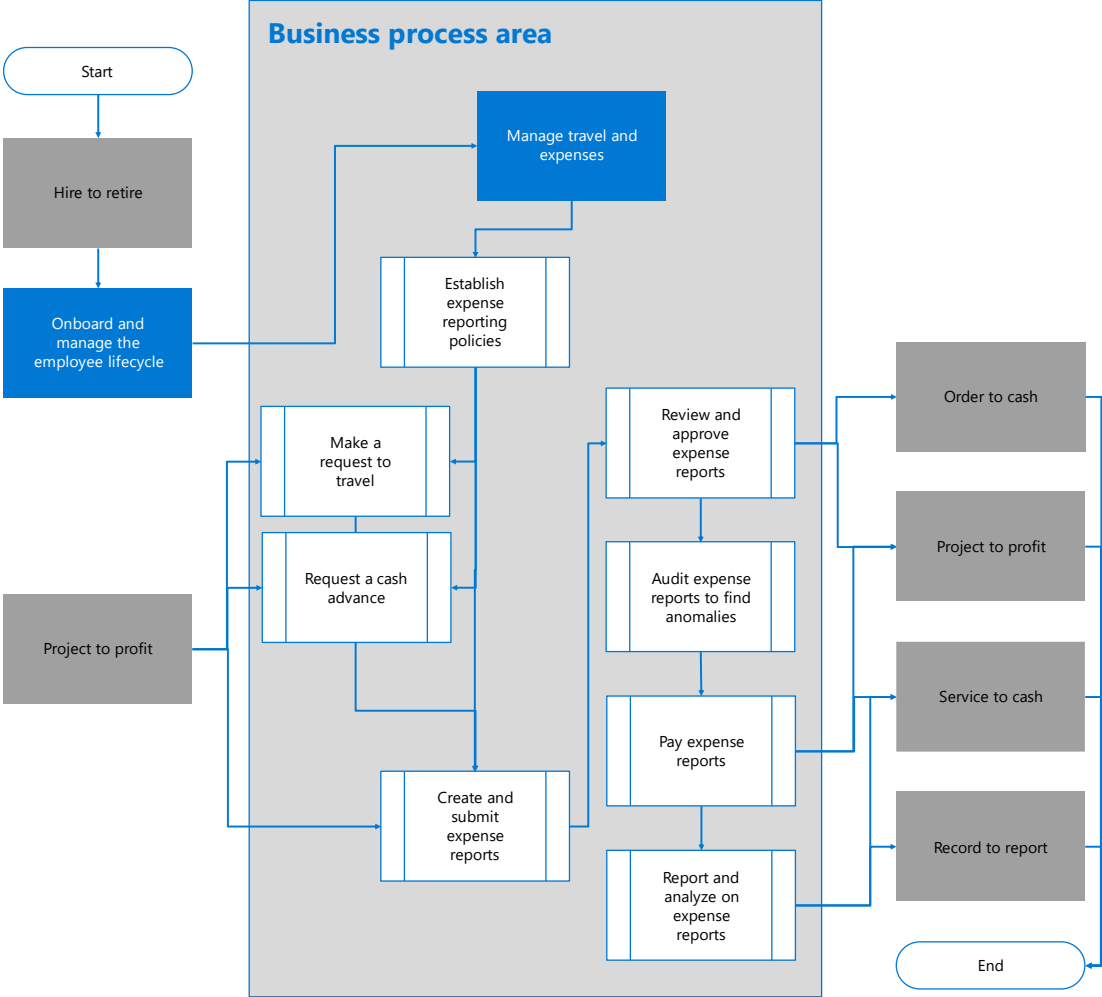
## APPS

- Business performance analytics
- Business performance planning
- Copilot for Finance (Preview)
- Demand planning
- Invoice capture

## WORKSPACES

Bank management	Commerce pricing and discount management	Electronic reporting	Learning	Product readiness for discrete manufacturing	Sales return processing
Benefits	Compensation management	Employee development	Leave and absence	Product readiness for process manufacturing	Store financials
Budget planning	Confirmed purchase orders with changes	Employee self service	Ledger budgets and forecasts	Product variant model definition	Store management
Business document management	Cost accounting ledger administration	Engineering change management	Maintenance request management	Production floor management	Supply risk assessment
Business processes for human resources	Cost administration	Expense management	Master planning	Project management	System administration
Business processes for payroll	Cost analysis	Feature management	My business processes	Purchase order confirmation	Task management
Cash overview - all companies	Cost control	Financial analysis - all companies	Optimization advisor	Purchase order preparation	Vendor bidding
Cash overview - current company	Customer credit and collections	Financial analysis - current company	Outbound work monitoring	Purchase order receipt and follow-up	Vendor information
Catalog management	Customer invoicing	Financial period close	Outbound work planning	Recruitment management	Vendor invoice automation
Category and product management	Customer payments	Fixed asset management	Payment workspace	Released product maintenance	Vendor invoice entry
Channel deployment	Data management	General journal processing	Payroll management	Resource lifecycle management	Vendor payments

# Manage travel and expenses overview



# Basic configurations

## Basic Configurations in Expense Management

### **1.Expense Management Parameters:**

- Define key parameters for streamlined processing

### **2.General Setup:**

- Expense categories
- Payment methods

### **3.Policy Setup:**

- Expense report (Expense policy)

### **4.Expense Workflow Setup:**

- Workflow for expense report

### **5.Employee and Vendor Mapping:**

- Employee mapping with user
- Vendor mapping with employee

# Demo – Submit Expense



# Contoso Entertainment System USA

Search people ...

< January 2025 >

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12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

- Work items assigned to me ^
- Cash advance request : Record ret...
  - Expense reports : Record returned
  - Catalog : catalog approval
  - Expense reports : Expense report a...
  - Cash advance request : Cash advan...
  - Approve travel requisition
  - Catalog : catalog approval

To-do list

You're all caught up on your tasks.

### APPS

- Business performance analytics
- Business performance planning
- Copilot for Finance (Preview)
- Demand planning
- Invoice capture

### WORKSPACES

- Bank management
- Cost accounting ledger administration
- Financial analysis - all companies
- Payment workspace
- Sales order processing and inquiry
- Benefits
- Cost administration
- Financial analysis - current company
- Payroll management
- Sales return processing
- Budget planning
- Cost analysis
- Financial period close
- People
- Store financials
- Business document management
- Cost control
- Fixed asset management
- Personnel management
- Store management
- Business processes for human resources
- Customer credit and collections
- General journal processing
- Product readiness for discrete manufacturing
- Supply risk assessment
- Business processes for payroll
- Customer invoicing
- Globalization studio
- Product readiness for process manufacturing
- System administration

# Resources



# Resources

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## Business Process

[Overview of business processes in Dynamics 365 - Dynamics 365 | Microsoft Learn](#)

[Introduction to the hire to retire end-to-end business process - Dynamics 365 | Microsoft Learn](#)

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## AI Features

[Use recruiting with copilot | Microsoft Learn](#)

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## Learn

[Overview of the hire to retire end-to-end business process flow - Dynamics 365 | Microsoft Learn](#)

[Hire to retire process areas broken down into multiple areas - Dynamics 365 | Microsoft Learn](#)

[Onboard and manage the employee lifecycle - Dynamics 365 | Microsoft Learn](#)

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## Community Resources

[Dynamics 365 Human Resources Dynamics Community Forum Thread](#)

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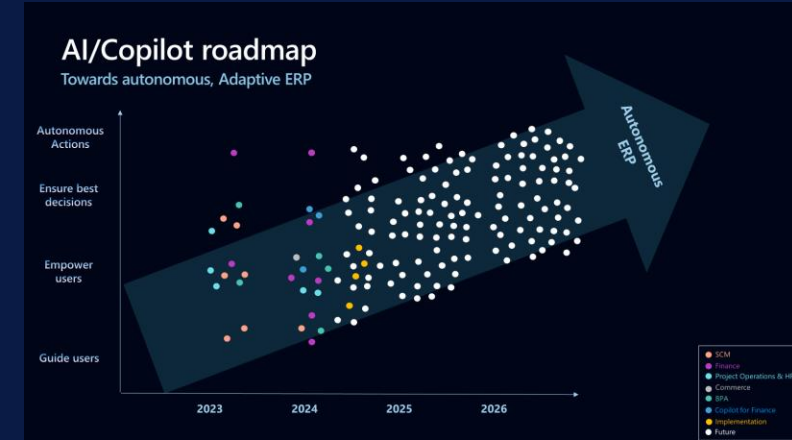


Roadmap

Human resource 2024 Wave 1 and Wave 2

# Human Resource portfolio: Roadmap

Leading the way to autonomous ERP



## 2024 Wave 1 (Released)

- New recruiting experience on Power Platform (Public Preview)
- Use copilot to summarize time off data for employee self service (GA)
- Human Resources Teams app for leave and absence

## 2024 Wave 2 (In progress)

- New recruiting experience on Power Platform (GA)
- Copilot scenarios for Employee recruiting
- Create candidate profiles in bulk from uploaded resumes
- Automated Onboarding Processes
- Expanding partnership with leading payroll providers in different regions, partnership with Zellis underway
- Benefits enrollment and administrative experience enhancements
- Performance management experience enhancements

## 2025 Wave 1+ (In Planning)

- AI/Copilot investment
  - Simplify the employee onboarding process for HR managers with Copilot
  - Simplify the onboarding process for new hires with Copilot
  - Streamline the onboarding process for hiring managers with Copilot
- Microsoft Entra ID(AAD) Integration, Integrating worker profile with AAD and D365HR streamlines data entry
- Avoid duplication with Microsoft Entra ID integration
- Integrate Human Resources with Viva Connections
- Optimize benefits enrollment processes
- Boost candidate screening efficiency with automated assessments
- Explore recruiting copilot scenarios
- Use recruiting for service-centric organizations

Thank you