

Microsoft Dynamics GP 2013 Human Resources

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Agenda

- Why choose GP HR? What are the benefits of using Microsoft Dynamics GP Human Resources?
- Applicant
- Employee
 - Orientation Checklist
 - Property
 - Skill Sets
 - Certification/License/Training
 - Reviews
- Business Portal – Self Service Suite

Is this YOU?



Why choose GP HR? And what are the benefits of using Microsoft Dynamics GP - HR?

- Work smarter, faster, and more efficiently to manage every aspect of your organizations' most important business asset – your employees?
- **It's FREE!!** Microsoft Dynamics GP Human Resource is included in GP 2013. Companies that have purchased GP 2010 prior to October 1, 2012 are also entitled to GP 2013 software, free of charge.
- **Streamline hiring processes.** Identify top applicants and help maintain a fair hiring process with customized interview forms and templates for acknowledgement, offer, and rejection letters.
- **Get detailed employee information instantly.** Respond to employee and management request with on-demand information views that allow you to quickly drilldown and put your finger on the exact information you need.
- **Share information efficiently.** The financial and payroll functionality of Microsoft Dynamics GP works with GP Human Resources to reduce redundant data entry and to **centralize data** for regulatory compliance and strategic planning.
- **Implement fair and consistent policies.** Follow a standardized hiring process, with regularly scheduled performance reviews and timely, effective HR services.
- **Increase employee satisfaction.** Ensure that employees are treated consistently with standardized hiring process and timely, effective HR services that build company-wide confidence and retain top-performing employees.

Applicant

- Identify top applicants and monitor hiring situations with customized interview forms and templates for acknowledgement, invitation, offer, and rejection letters
- Successful candidate information that imports into employee records with a single step, eliminating the need to re-enter the information.

Applicant

File Edit Tools Help sa Fabrikam, Inc. 4/12/2017

Save Clear Delete Reports Cancel Write Letters

Demographic

Last Name Smith

First Name John

Middle Name

Soc Sec Number 123-45-6787

Address 150 Main Street

City Harwinton

State CT ZIP Code 16791

Country

Phone 1 (860) 485-9999

Phone 2 (000) 000-0000 Ext.

Gender Female

Ethnic Origin White

Age 46 - 55

Disabled Vietnam Era Veteran

Veteran Special Disabled Veteran

Other Veterans

Armed Forces Service Medal Veteran

Number of Applications: 1

Apply Date 5/2/2013

Requisition No. 0

Company

Division

Department

Position

Location

Status


Reject Reason

Reject Comment

Relocation Yes No

Referral Source Newspaper

Description

Color Code  Blue

Reply Letter Sent

Extra Fields

by Name Last Change: sa 4/12/2017

Applicant

Costs

Education

Hire

Interviews

Offers

References

Skills

Tests

User Defined

Work History

Employee

- Capture and store a comprehensive record of details for each employee
- Fully integrates with GP Payroll

The screenshot displays the 'Employee Maintenance' application window for 'sa Fabrikam, Inc. 4/12/2017'. The interface includes a menu bar (File, Edit, Tools, Help) and a toolbar with 'Save', 'Clear', and 'Delete' options. The main area is divided into several sections:

- Employee ID:** ACKE0001
- Class ID:** SUPP
- Personal Information:** Last Name (Ackerman), First (Pilar), Middle, Suffix, Soc Sec Number (917-23-9833)
- Employment Dates:** Seniority Date (0/0/0000), Hire Date (8/3/2013), Adjusted Hire Date (8/3/2013), Last Day Worked, Date Inactivated (0/0/0000), Reason
- Address Information:** Address ID (PRIMARY), Address (987 Willow Ave), City (Winnetka), State (IL), ZIP Code (98272), Country (USA), Phone 1-3 ((312) 555-0115 Ext. 0000)
- Work Details:** SUTA State (IL), Workers' Comp (ILW/C01), Employment Type (Full Time Regular), Use Add-On (checkbox)
- Organizational Data:** Division (MAIN), Department (SPTS), Position (CSP), Location (PRIMARY), Supervisor (SUPMGR)

At the bottom, there are buttons for 'Additional Positions', 'Human Resources', 'Address', and 'Additional Information'. A dropdown menu is open over the 'Human Resources' button, listing various HR-related functions:

- Payroll
- Human Resources
 - Attendance
 - Ben/Ded Summary
 - Combined History
 - Dependents
 - Discipline
 - Education
 - Grievance
 - I-9
 - Injury/Illness
 - Orientation
 - Position History
 - Property
 - Reviews
 - Skills
 - Termination
 - Tests
 - Training
 - Transfers
 - Union
 - User Defined
 - Licenses
 - Certifications
 - Health and Wellness

Orientation Checklist

- Tailor the orientation process for employees
- Prevent Costly Oversights

Orientation Checklist

sa Fabrikam, Inc. 4/12/2017

File Edit Tools Help

Save Clear Delete Reports Cancel

Employee ID: BARB0001 Barbariol, Angela

Orientation Name: Standard Start Date: 10/31/2014 End Date: 0/0/0000

Completed	Checklist Item
	Person Responsible
	Event Start: Date/Time Event End: Date/Time
<input type="checkbox"/>	Notify payroll of new employee
<input checked="" type="checkbox"/>	W-4 Completed
<input checked="" type="checkbox"/>	I-9 Completed
<input type="checkbox"/>	Completed Employee File
<input type="checkbox"/>	Nametag Issued
<input type="checkbox"/>	Employee photograph taken
<input type="checkbox"/>	Keys Issued
<input type="checkbox"/>	Employee Tracking data completed
<input type="checkbox"/>	Policy Manual & Safety Manual verification
<input type="checkbox"/>	supervisor's Checklist for new employee returned
<input type="checkbox"/>	Hazard communication/right to know training
<input type="checkbox"/>	Pre-employment training completed
<input type="checkbox"/>	set first review date

Orientation verified by: _____ Notify Payroll

by Employee ID Last Change: 4/12/2017 sa

Certification/License/Training

- Track key certifications, license & training info for employees
- Automate the tracking of expiration dates for certifications & licenses to help you meet renewal deadlines
- Encourages employees to keep credentials current
- Help ensure employee safety and legal compliance, while increasing productivity and reducing costs
- Inquiry tools and Smartlist reporting keeps HR current and up to date

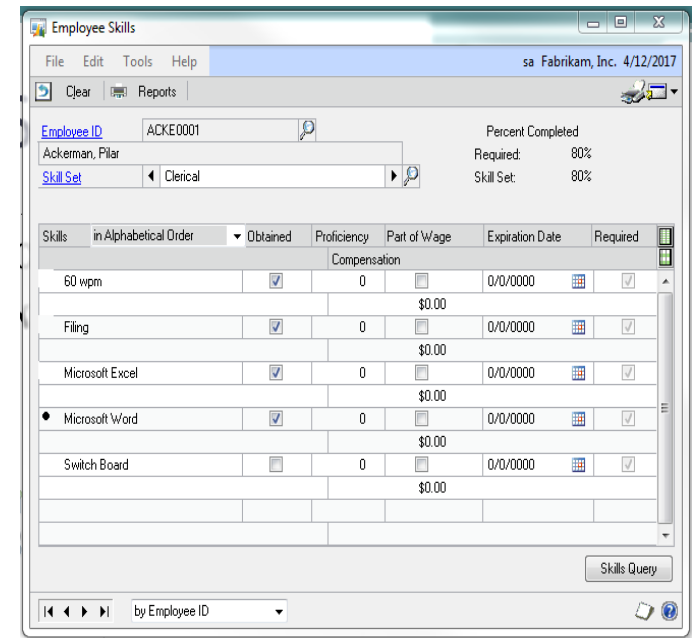
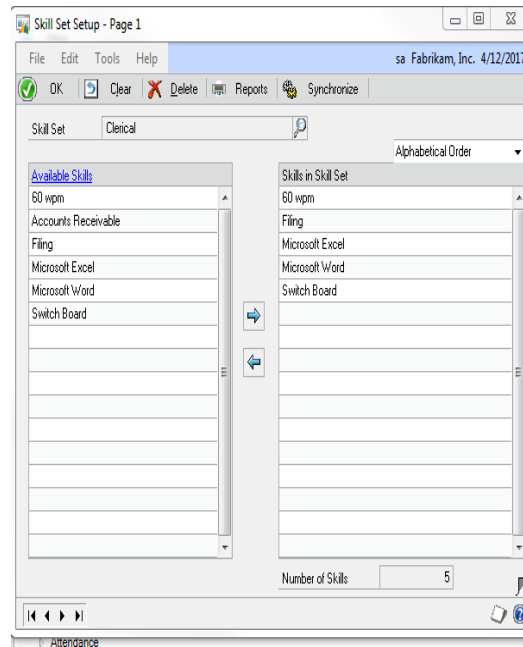
The screenshot displays the 'Certification Entry' application window. The title bar shows 'sa Fabrikam, Inc. 4/12/2017'. The menu bar includes 'File', 'Edit', 'Tools', and 'Help'. Below the menu bar are 'Clear' and 'Delete' buttons. The main data entry area is organized into several sections:

Employee ID	DOYL0001	Doyle, Jenny
Department	ACCT	Accounting
Position	ATC	Accounting Clerk
Certification Code	CPA	Certified Public Accountant

Below this table, there is a 'Certification Number' field with the value '12359842' and an 'Inactive' checkbox. The 'Issued By Agency' is 'SBA' (State Board of Accountancy). The 'Original Issue Date' is '10/27/2007' and the 'Date Renewed' is '10/27/2012'. The 'Expiration Date' is '10/26/2014'. There are four 'User-Defined' fields (1-4) for additional data entry. At the bottom, there are 'Endorsements' and 'History' buttons. The footer shows navigation icons, a dropdown menu set to 'by Employee ID', and a 'Last Change' field.

Skills Sets

- Individual skills are defined.
- Skills can be added to skill sets
- Skill Sets are added to the employee
- Identify potential skill shortages for proactive planning, hiring, and training to meet future needs
- Match external and internal applicants to open positions



Review

- Improve and standardize your performance review process with consistent scheduling and notification, and use weighted scores to support wage adjustment decisions.

Review Policies Setup

sa Fabrikam, Inc. 4/12/2017

File Edit Tools Help

Save Clear Delete Reports Cancel

Review Setup Name: 90 Day Review

Review Intervals

18 Months (547 Days)
24 Months (730 Days)
Previous + Every 6 Months
Previous + Every 12 Months

12 Months (365 Days)
Previous + Every 12 Months

Review Categories

Category to Insert

Numbers
Words

Category	Word Set
Leadership	4
Attendance	5
Quality of Work	8

Reorder

Next Review Based on Employee's...
 Hire Date Date of Last Review Adjusted Hire Date

Post Date of Next Review to the To Do List ?

Employee Review

sa Fabrikam, Inc. 4/12/2017

File Edit Tools Help

Save Clear Delete Reports Cancel

Employee ID: ACKE0001 Ackerman, Pilar

Company: Fabrikam, Inc. Location: Fabrikam, Inc.

Division: Main Supervisor: Support Manager

Department: Support Services Status: Active

Position: Consultant/Support Employment Type: Full Time Regular

Review Date: 09/02/2014

Review Type: Supervisor

Review Category	Review Word Rating	Notes
Attendance	Good	
Attitude	Excellent	
Communication Skills	Average	
Leadership	Good	

by Employee ID Last Change LESSONUSER1 10/31/2014

Business Portal - Self Service Suite

- **Give your people better access to information**
 - Increase efficiency across your organization by providing managers and employees access to their personal information through a customized, Role Tailored Web portal. The self-service capabilities in Microsoft Dynamics GP and the automated transfer of information to the HR department help eliminate paper-based systems, freeing your staff to focus on higher priorities.
 - Employees can review payroll and benefits, update personal information, submit vacation requests, enter timecards, apply for job openings, view the organization chart, and more—all within a personalized portal.
- **Offer easy benefit enrollment.** Use your existing human resource infrastructure to provide open enrollment for your employees. The wizard-driven, employee-specific selection process is easy to use for your entire staff.
- **Manage teams more effectively.** With access to multilevel direct report information, managers can:
 - View education, licenses, certifications, and training progress.
 - Evaluate team skills.
 - Create internal job postings.
 - Check internal and external applicant status.
 - Review compensation and performance history.
 - Monitor and approve vacation and leave requests at any time.



**"Yeah, I keep a clean desk. Now all
the mess is in the computer!"**

How to Contact CAL Central Support Desk



- Call: (860) 485-0910 ext. 3
- Email: support@calszone.com
- Online: www.calszone.com