Business Solutions

User Manual

xRM1 HR Management

English

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DIN A4, Version v041

0 Before you start

0.1 Foreword

"xRM1 HR Management" is the Business Solution for recruiting, managing and developing company employees, including Employee Services, in Microsoft Dynamics.

It includes functions for Candidate Management, Onboarding, Organizational Charts, Absence Management, Skill and Performance Management, as well as Scorecards. Employee Services for Time Entry, Request for Leave and Expenses & Travel Management are also included.

We recommend that the reader of this manual has basic knowledge of project management and is proficient in working with Microsoft Dynamics.

If you don't meet these requirements, we recommend that you familiarize yourself with these topics beforehand, as this will help you work more efficiently and sensibly with ***"xRM1 HR Management"***.

Note: ***"xRM1 HR Management"*** *is built upon all Microsoft standards, particularly in regards to forms, views and rights and roles. Should you find that information, elements or functions are not as they appear in the document, please ensure that the user you are using has the required rights and that the required basic settings are in the system.*

As many HR executives use Microsoft Outlook in order to manage their staff and the several HR functions, the description of the functions in this manual is based on Microsoft Outlook wherever applicable.

0.2 System requirements

In order to use ***"xRM1 HR Management"***, several system requirements must be in place. They can be found in the "Getting started guide" on our website http://www.xRM1.com.

1 Terminology

The following selected terms are found within ***„xRM1 HR Management".*** Here you will find them defined in more depth, for further clarification.

1.1 Costs

Costs define the monetary expenditure the project creates within your organization. These are only internal costs, in different forms (from personnel-related expenditure, material usage, travel, etc.)

1.2 Full Time Equivalent

A full time equivalent, sometimes abbreviated as FTE, is a unit to measure employed people in a way that makes them comparable although they may work a different number of hours per week.

The unit is obtained by comparing an employee's average number of hours worked to the average number of hours of a full time worker.

A full time person is therefore counted as one FTE, while a part-time worker gets a score in proportion to the hours he or she works. For example, a part-time worker employed for 20 hours a week where full time work consists of 40 hours, is counted as 0.5 FTE.

1.3 Business Closure

The business closure defines the days in which vacation is mandatory for the whole company. Thus, an employee's remaining days of leave are reduced automatically for business closure days. Business Closures are standardized for all employees.

1.4 Absence

Absence includes all types of vacation/leave with remaining days of leave.

1.5 Public Holiday

Public holidays can be standardized for all employees. Here, leave is not subtracted.

1.6 New Annual Leave

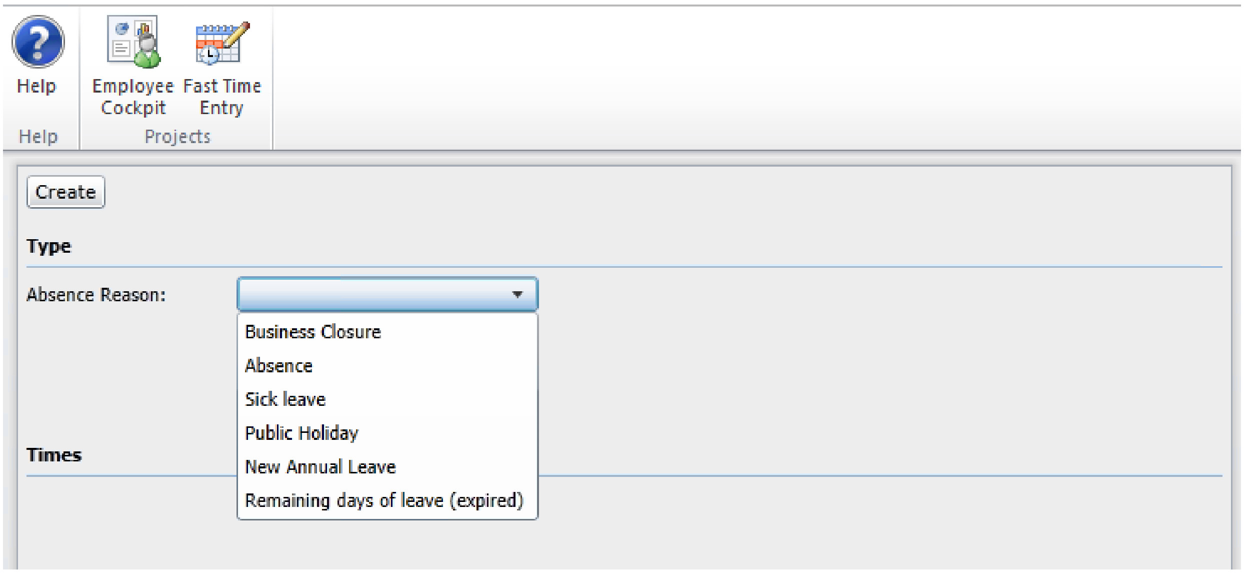
New annual leave for the upcoming year can be entered individually for each employee.

1.7 Remaining days of leave (expired)

If an employee has not taken all of his/her allotted vacation by the end of a business year, the company can decide that remaining days of leave will expire.

2 System administration settings

2.1 Absence Administration



In the main **"*Settings*"** menu, the **"*Extensions*"** section displays a function ***"Absence Administration"*** which is specific to **"*xRM1 HR Management*"**.

"Absence Administration" is an extension of ***"Requests for Leave"*** and completes the employee absence administration process. Illness, public holidays and business closures can all be managed centrally here by the HR department. The role ***"xRM1 HR Manager"*** is required for access to this area.

2.1.1 Business Closure

The ***"Business Closure"*** status allows business closures to be created. For all users, the relevant number of vacation days is subtracted from the remaining holiday, and a business closure is generated in the work time calendar of Microsoft Dynamics.

2.1.2 Absence

"Absence" is used to flag an employee as "not available" for a certain period of time, due to illness or other reasons. The number of remaining vacation days for this employee is not changed.

2.1.3 Sick leave

"Sick leave" is a special characteristic of an absence. An employee's absence caused by sickness or illness is entered here. The functionality of a ***"Sick leave"*** is equal to an ***"Absence"***.

2.1.4 Public holidays

Selecting ***"Public holiday"*** adds an absence for all relevant employees for the date selected. Unlike selecting business closure, there is no change to the number of remaining vacation days.

2.1.5 New annual holiday

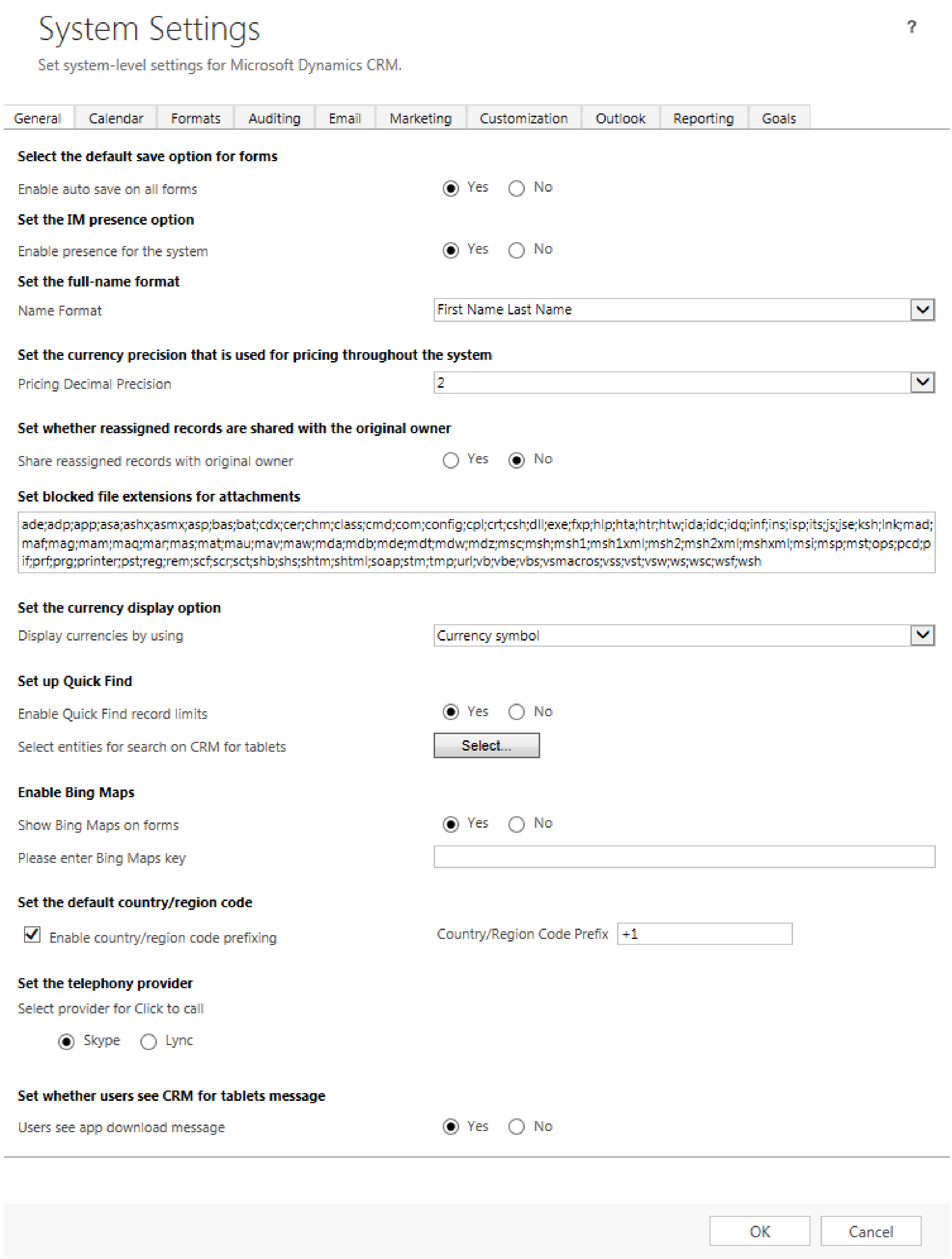
"New annual holiday" is available to enter new annual holiday for all employees. The system takes the ***"Annual holiday"*** value for every employee, stores it for every user in the user entity, and adds any available holiday remaining.

2.1.6 Remaining days of vacation (expired)

"Remaining days of vacation (expired)" is used for every employee individually, to deduct unused vacation from the vacation days allotted. This process must be done by the HR department for every employee. The function automatically reduces the remaining vacation days for that user.

2.2 „Bing Maps" Integration

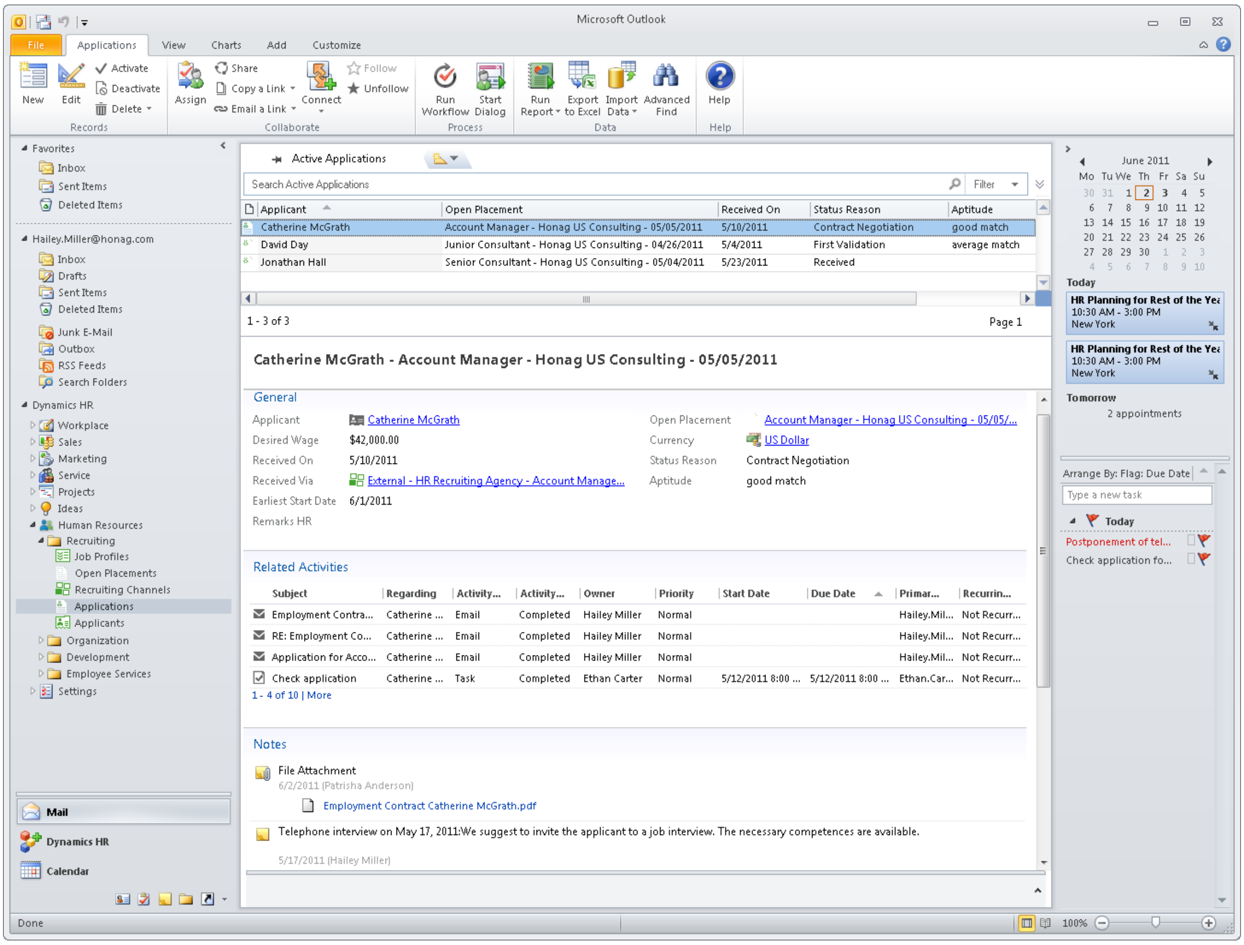
In order to use ***"Bing Maps"*** integrations (e.g. in the ***"Employee"*** or ***"Applicant"*** form), please assure that ***"Enable Bing Maps"*** is set to ***"Yes"*** under ***"Settings"*** --> ***"Administration"*** --> ***"System settings"*** --> ***Tab „General"***.


System Settings
?
Set system-level settings for Microsoft Dynamics CRM.
General
Calendar
Formats
Auditing
Email
Marketing
Customization
Outlook
Reporting
Goals
Select the default save option for forms
Enable auto save on all forms
Yes
No
Set the IM presence option
Enable presence for the system
Yes
No
Set the full-name format
Name Format
First Name Last Name
Set the currency precision that is used for pricing throughout the system
Pricing Decimal Precision
2
Set whether reassigned records are shared with the original owner
Share reassigned records with original owner
Yes
No
Set blocked file extensions for attachments
ade;adp;app;asa;ashx;asmx;asp;bas;bat;cdx;cer;chm;class;cmd;com;config;cpl;crt;csh;dll;exe;fxp;hlp;hta;htr;htw;ida;idc;idq;inf;ins;isp;its;js;jse;ksh;lnk;mad;maf;mag;mam;maq;mar;mas;mat;mau;mav;maw;mda;mdb;mde;mdt;mdw;mdz;msc;msh;msh1;msh1xml;msh2;msh2xml;mshxml;msi;msp;mst;ops;pcd;pif;prf;prg;printer;pst;reg;rem;scf;scr;sct;shb;shs;shtm;shtml;soap;stm;tmp;url;vb;vbe;vbs;vsmacros;vss;vst;vsw;ws;wsc;wsf;wsh
Set the currency display option
Display currencies by using
Currency symbol
Set up Quick Find
Enable Quick Find record limits
Yes
No
Select entities for search on CRM for tablets
Select...
Enable Bing Maps
Show Bing Maps on forms
Yes
No
Please enter Bing Maps key
Set the default country/region code
Enable country/region code prefixing
Country/Region Code Prefix
+1
Set the telephony provider
Select provider for Click to call
Skype
Lync
Set whether users see CRM for tablets message
Users see app download message
Yes
No
OK
Cancel

3 Using xRM1 HR Management via Microsoft Outlook

Many HR managers prefer using Microsoft Outlook to organize and develop the staff they are responsible for. Therefore, the usage of the ***"xRM1 HR Management"*** functions will be described from a Microsoft Outlook point of view.

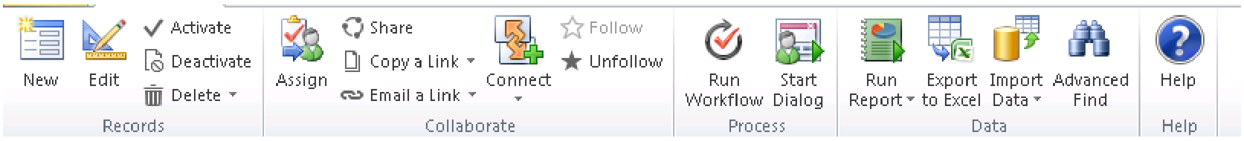
In order to use a function in Outlook, click on the desired function on the right hand site. The start screen of the function shows a respective view and a preview of the selected record.



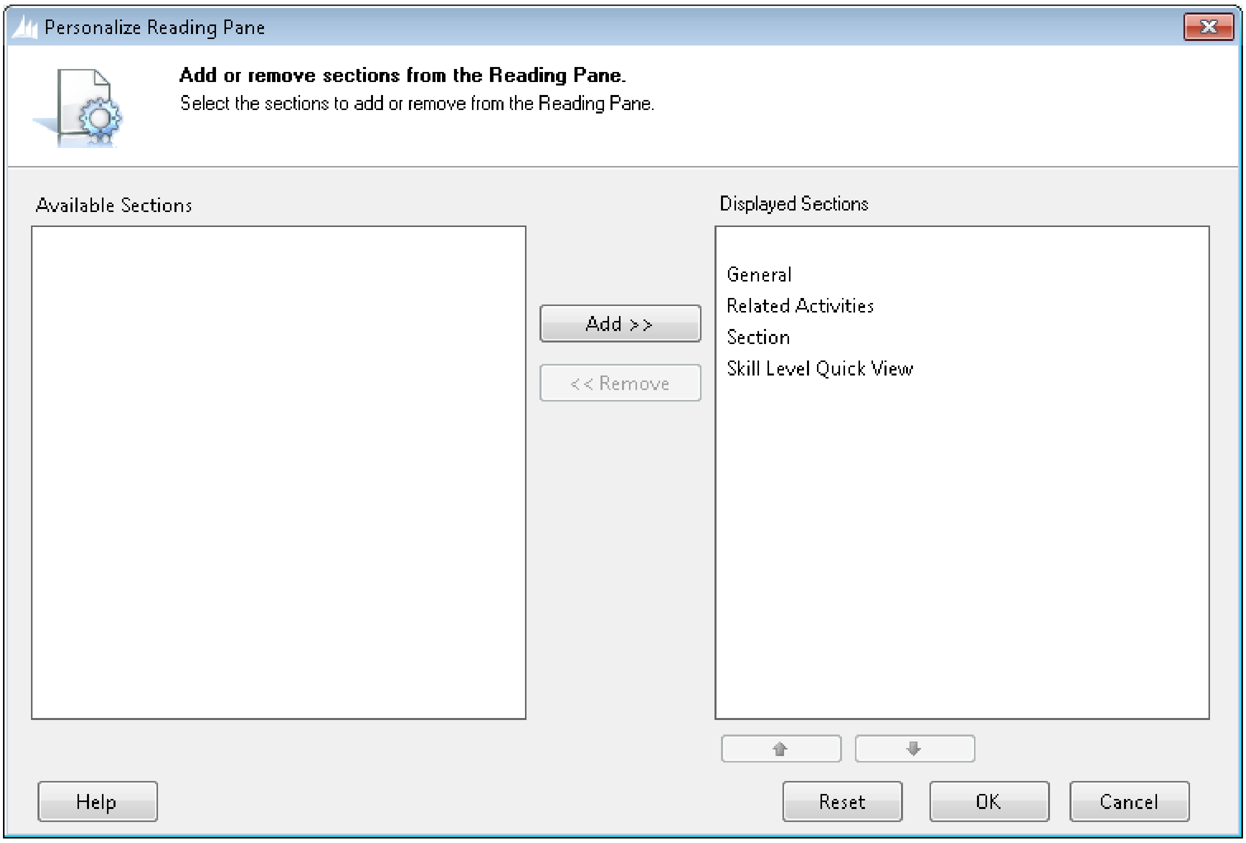
The displayed sections of the record can be moved by drag and drop.

The layout can be changed by clicking on ***"View"*** and then on the respective button in the ***"Layout section"***, e.g. ***"Navigation Pane"***.

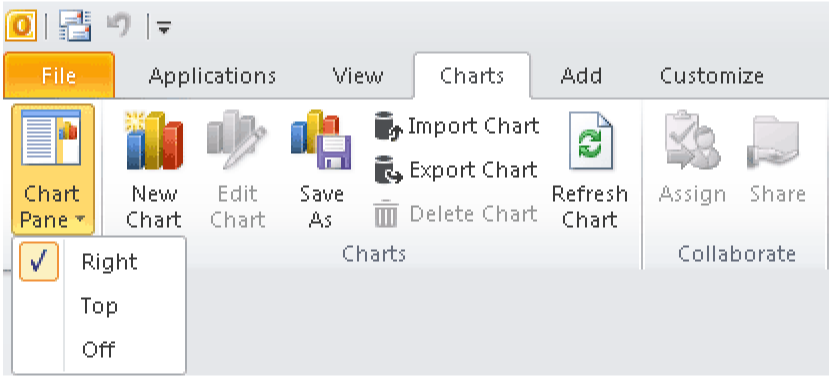
As known from Microsoft Dynamics, the user may create new records and edit, activate, deactivate, delete, assign or share it. Other functionalities from Microsoft Dynamics such as running workflows or reports may be used as well in Outlook.



The preview of each function can be easily adapted by clicking on ***"View"*** and the ***"Customize reading pane"***. Here, you can select the displayed sections.



A chart pane can be added by clicking on ***"Charts"*** and then on ***"Chart Pane"***. Here the chart corresponding to the selected view is displayed.



In Microsoft Outlook, you can also decide which view is displayed for which function. Views can be tabbed easily.

1. Open the desired view in a tab by clicking the tab to the right of the active tab, and select the view.
2. Click the push pin and it will turn vertical.
3. The new view is now "pinned".

4 xRM1 HR Management Functions

The xRM1 HR Management functions are classified under the following categories:

- ***"Recruiting"***
- ***"Organization"***
- ***"Development"***
- ***"Employee Services"***

These categories will be explained in more detail in the upcoming chapters. You will find a detailed description of every field important to a respective function.

Typically, the ***"Recruiting"***, ***"Organization"*** and ***"Development"*** sections are used by HR managers or HR supervisors. The ***"Employee Services"***, on the other hand, can be used by every staff member.

4.1 Employee Recruiting

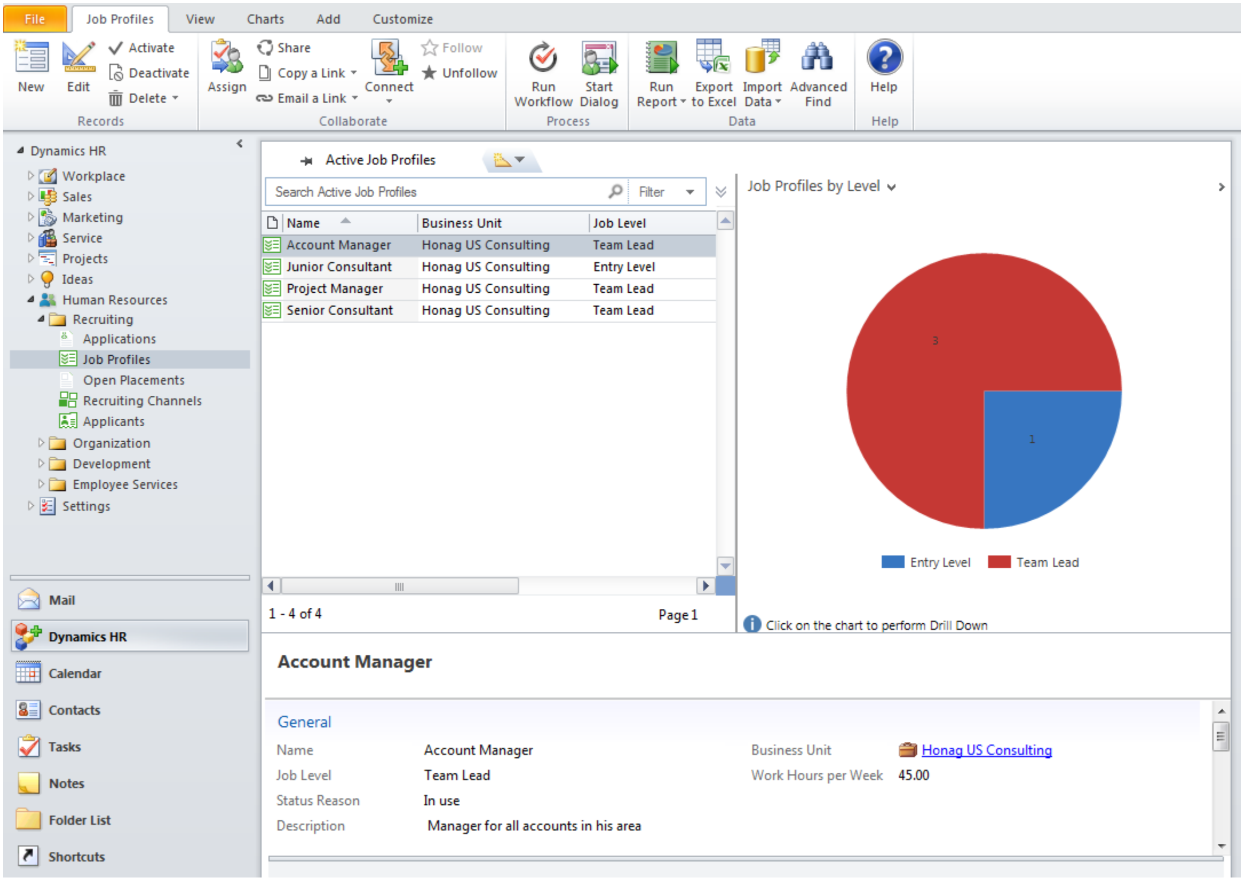
In the ***"Recruiting"*** section, all applications can be filed, filtered and sorted according to individual requirements.

Submit open job requirements, which may be based on specific job profiles, and match applications to open placements. Links to vacancies can be published internally, or to external job markets.

Create standardized job profiles with requirements which can be matched to applicant profiles.

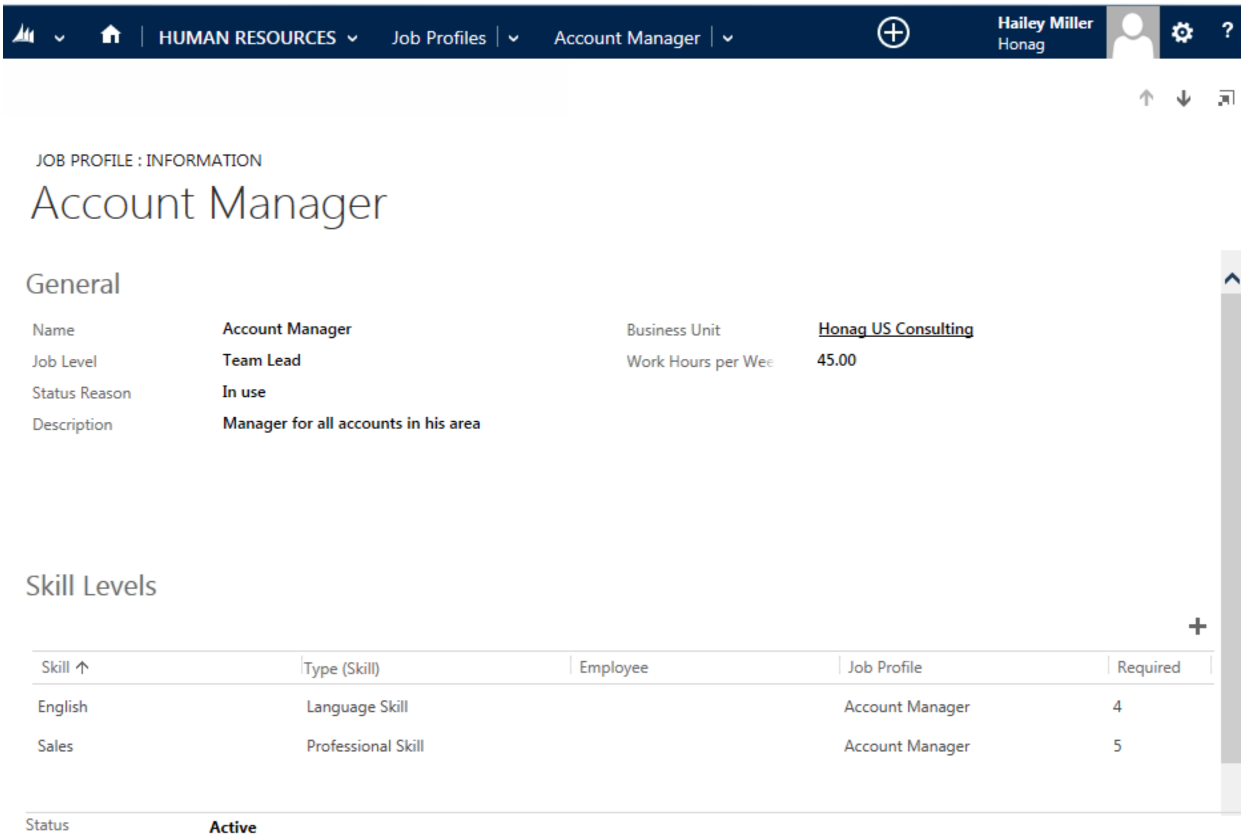
Add applicants and organize them with the standard Microsoft Dynamics ***"Contact"*** form. ***"xRM1 HR Management"*** is fully integrated; thus, all other Microsoft Dynamics functionalities are accessible and every applicant can easily be converted to an employee, once the application process is complete. You can see the relation between candidates and their various applications.

4.1.1 Job Profiles



As default chart, ***"Job Profiles by level"*** is displayed in the Outlook start screen of this entity. A pie chart shows how many job profiles call a certain level.

4.1.1.1 Main form



"Name": Here, you give the job profile a name.

"Business Unit": The respective business unit or department can be chosen here.

"Job Level": The user can select a certain job level for this position. Here, he/she can choose between

- ***"Entry Level"***,
- ***"Team Lead"***
- ***"Management"*** and
- ***"Upper Management".***

"Work Hours per Week": The amount of hours per week for this position is entered here.

"Status Reason": The user can decide if the job profile is a

- ***"Draft"*** or
- ***"In use".***

"Description": The user can describe the job profile in more detail here.

"Skill Levels": In this sub-grid, you will find the skill levels corresponding to this job profile.

"Open Placements": In this sub-grid, corresponding open placements can be found.

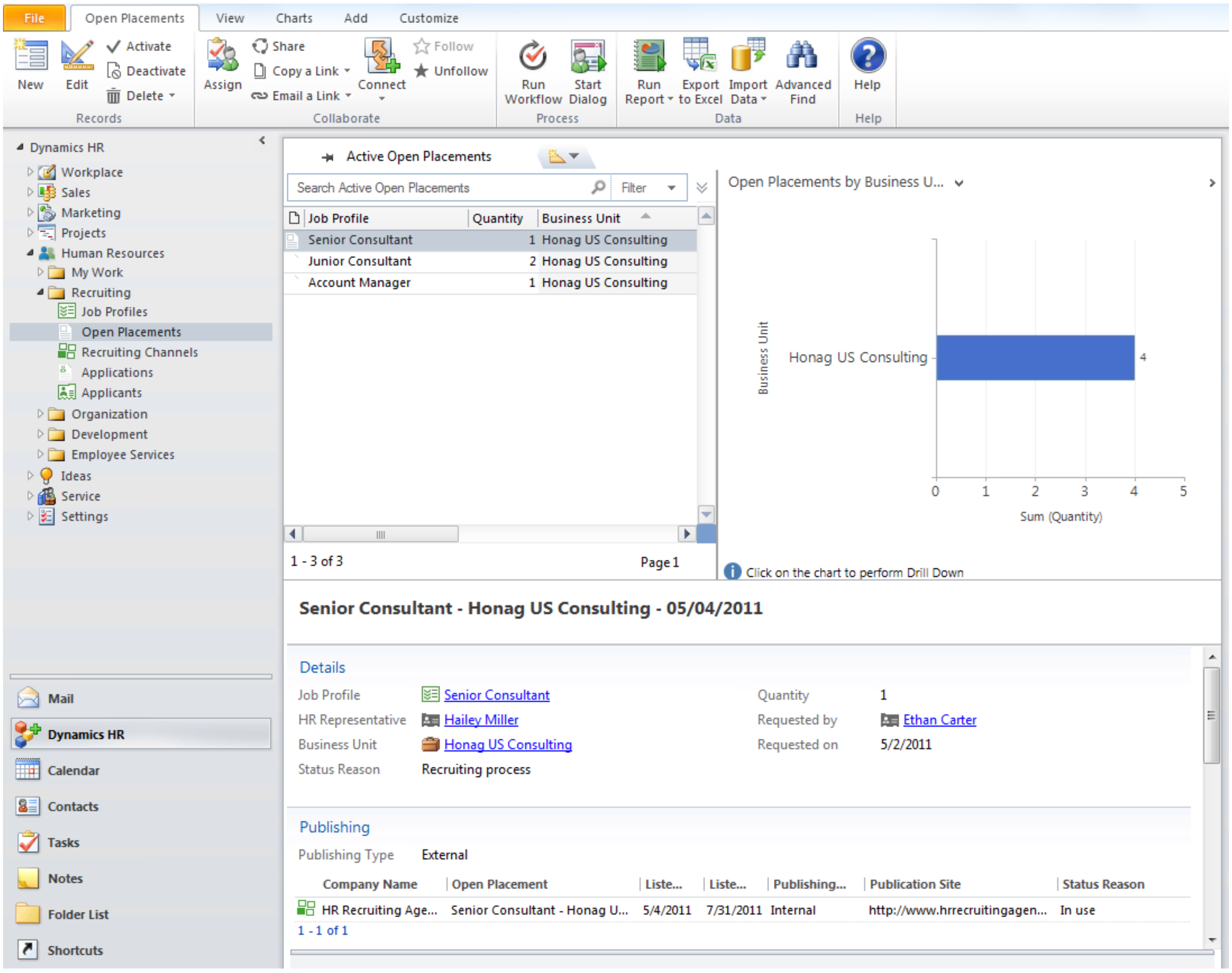
4.1.1.2 Form "Skill Level"

As ***"Skill Level"*** is a separate entity, please see chapter 4.3.5 for details.

4.1.1.3 Form "Open Placement"

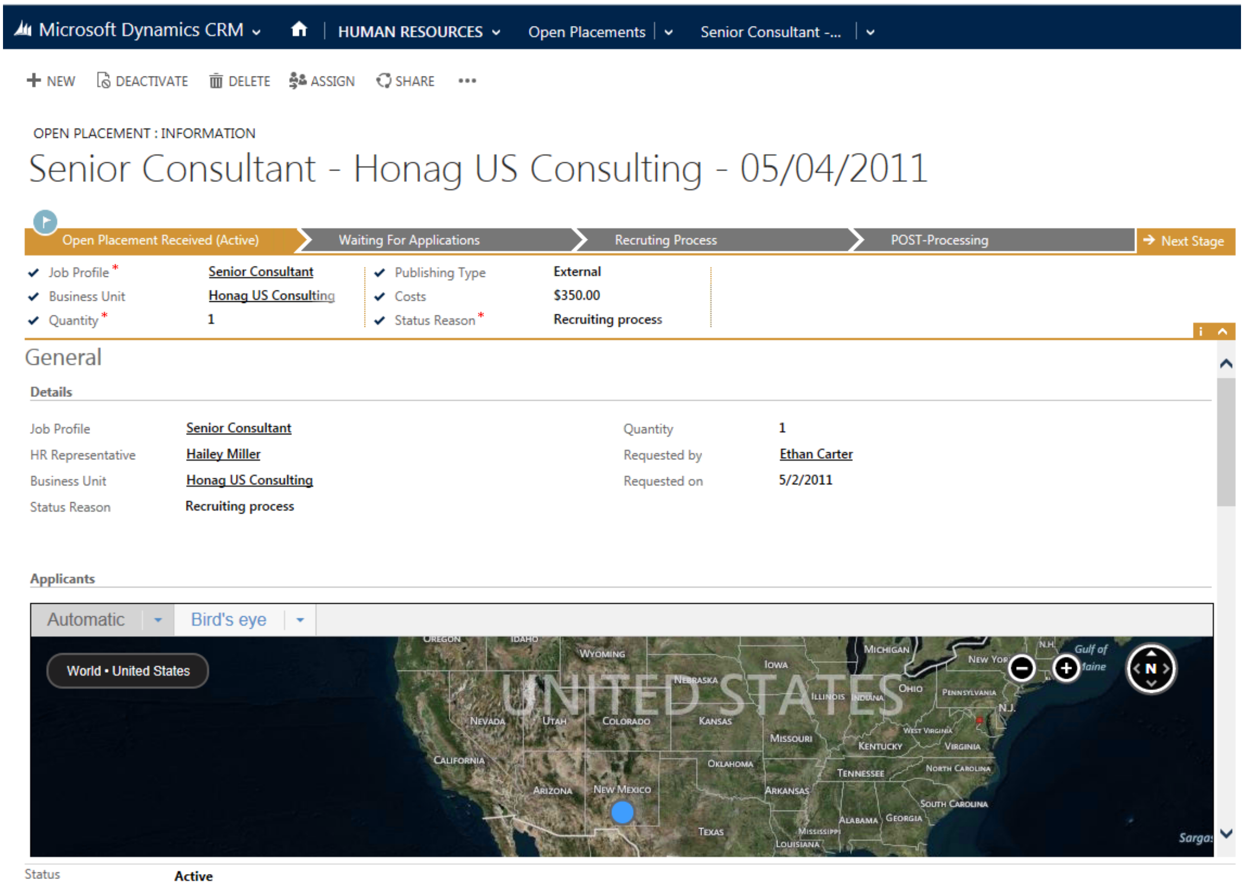
As ***"Open Placement"*** is a separate entity, please see chapter 4.1.2 for details.

4.1.2 Open Placements



As default chart, ***"Open Placements by Business Unit"*** is displayed in the Outlook start screen of this entity. A bar chart shows how many open placements exist in which business unit.

4.1.2.1 Main form



"Job Profile": The user can select the job profile which the open placement is based on here.

"Quantity": Enter how many identical vacancies are open at present.

"HR Representative": The HR manager who is in charge of the open placement is selected here.

"Requested by": The person who requested the vacancy.

"Business Unit": The respective business unit or department where the open placement is located in can be chosen here.

"Requested on": The date when the open placement was requested.

"Status Reason": The user can select a status reason for the open placement. Here, he/she can choose between

- ***"Waiting for authorization"***,
- ***"Waiting for applicants"*** and
- ***"Recruiting process".***

"Publishing Type": Here you can select how the open placement is published. The user may choose between

- ***"Internal"***,
- ***"External"*** or
- ***"Internal & External".***

"Listed on": The day on which the open placement was published.

"Costs": Here, the user may enter the amount of costs corresponding to a specific open placement.

"Currency": The currency of the placement costs can be selected here.

"***Recruiting Channels":*** In the following sub-grid, you can choose where open placements are published.

"Active Applicants": This sub-grid shows active applicants for the specific open placement.

"Inactive Applicants": Here, inactive applicants concerning an open placement are displayed.

In addition, a "Bing" map shows you the places where the applicants for the specific open placement are located.

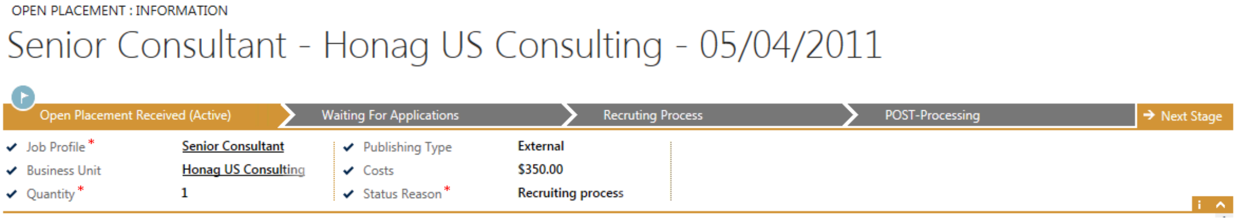
4.1.2.2 Form "Recruiting Channel"

As ***"Recruiting Channel"*** is a separate entity, please see chapter 4.1.3 for details.

4.1.2.3 Form "Applicants"

As ***"Applicant"*** is a separate entity, please see chapter 4.1.5 for details.

4.1.2.4 Business Process Flow



A default business process flow for open placements was created. It includes the following stages and fields:

"Open Placement Received":

- ***"Job Profile"***,
- ***"Business Unit"***,
- ***"Quantity"***,
- ***"Publishing Type"***,
- ***"Costs"*** and
- ***"Status Reason"***.

"Waiting for Applications":

- ***"Status Reason"***.

"Recruiting Process":

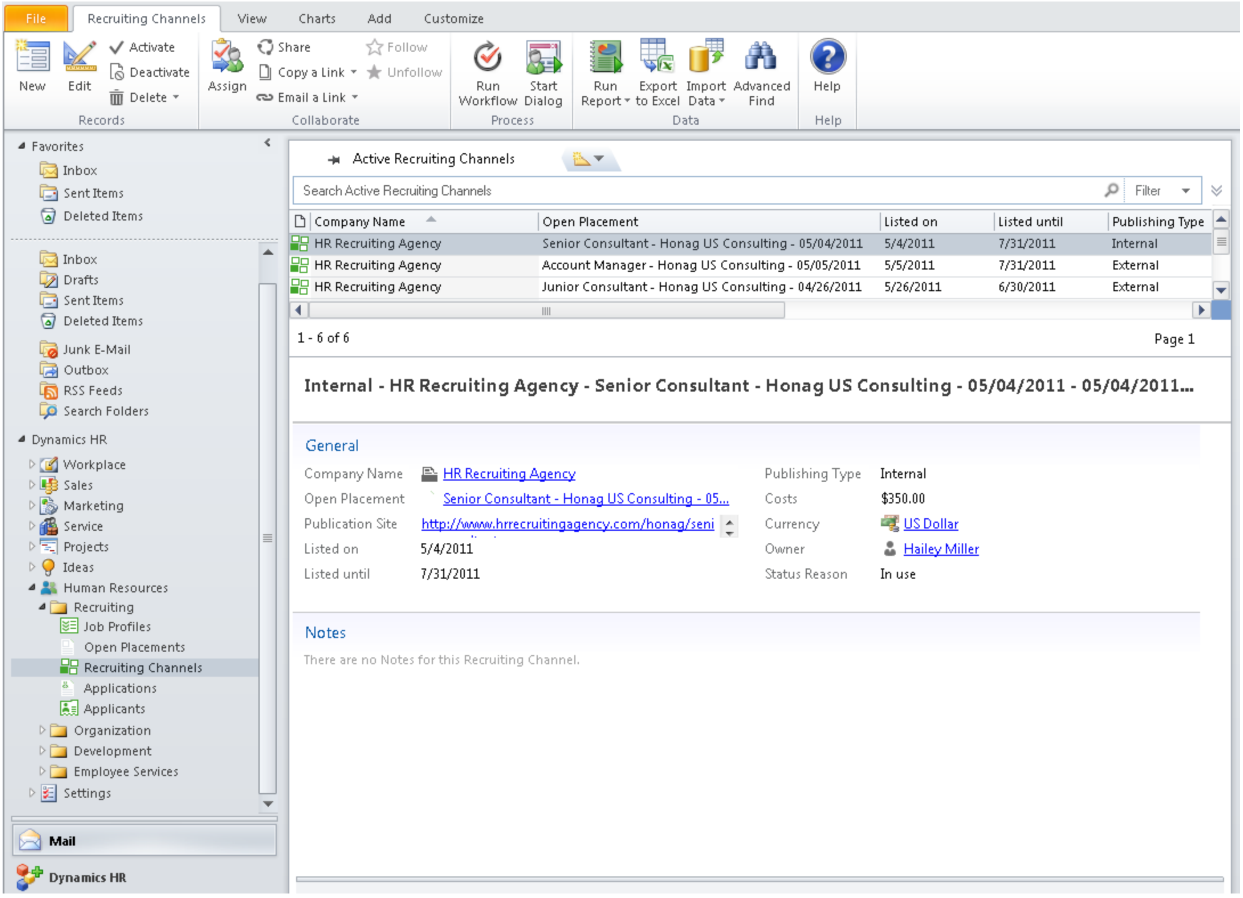
- ***"Status Reason"***.

"Post-Processing":

- ***"All positions filled"***.

Note: *Fields can be added specifically just to the process flow. In addition, they can be on the form as well as on the process flow. If this is the case, entering or changing data in a field will apply for the form and the process flow.*

4.1.3 Recruiting Channels



"Company Name": With this look-up field, the user may select an ***"Account"*** which is the recruiting channel for the respective open placement.

"Publishing Type": Here, you can select how the open placement is published. The user may choose between

- ***"Internal"*** or
- ***"External"***.

"Open Placement": The respective open placement for the recruiting channel can be selected here.

"Costs": Here, the user may enter the amount of costs corresponding to a specific open placement of this recruiting channel.

"Currency": The currency of the placement costs for this recruiting channel can be chosen here.

"Publication Site": Enter the link of the page where the recruiting channel has posted the open placement.

"Listed on": The day on which the open placement was published by this recruiting channel.

"Listed until": The day until which the open placement is published by this recruiting channel.

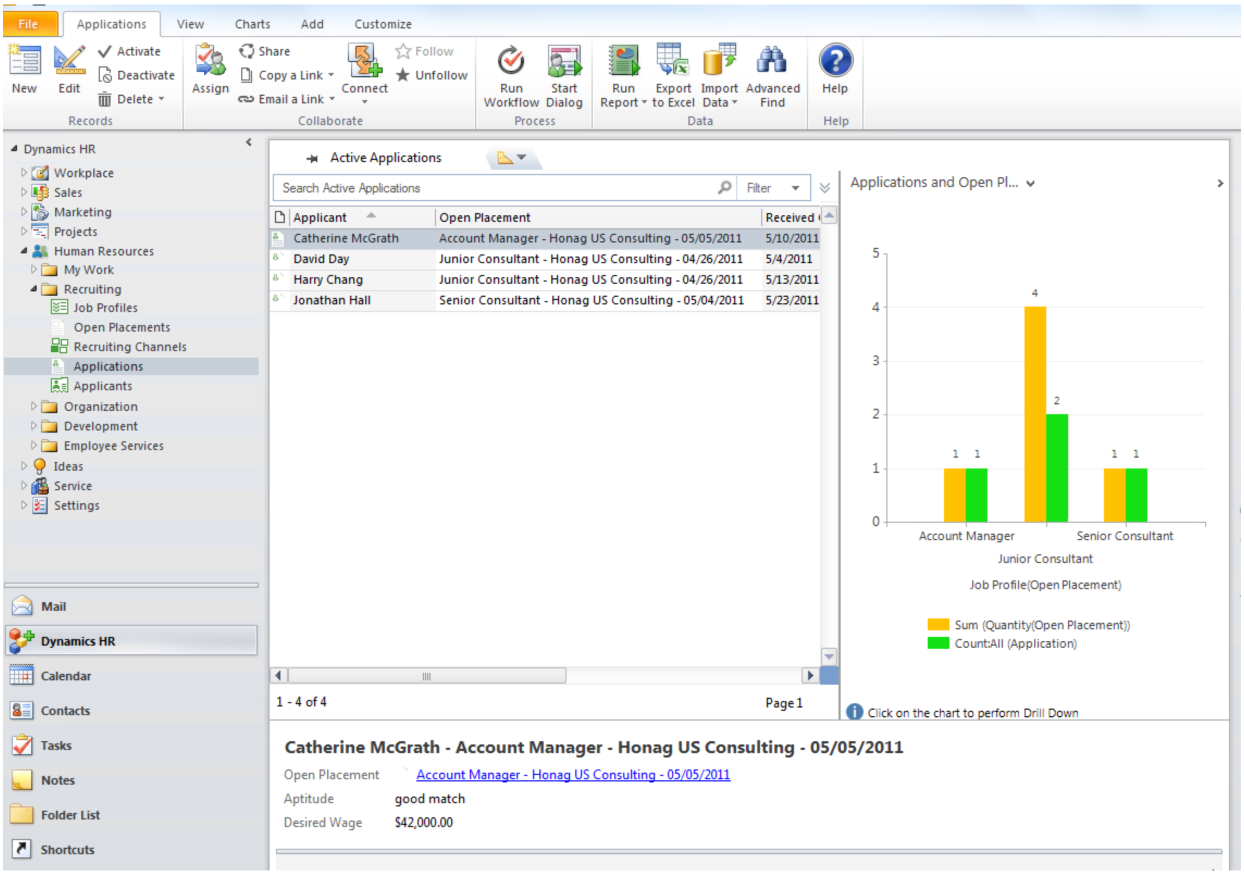
"Owner": Owner of the record.

"Status Reason": The user can decide if the job profile is

- ***"In use"*** or in the

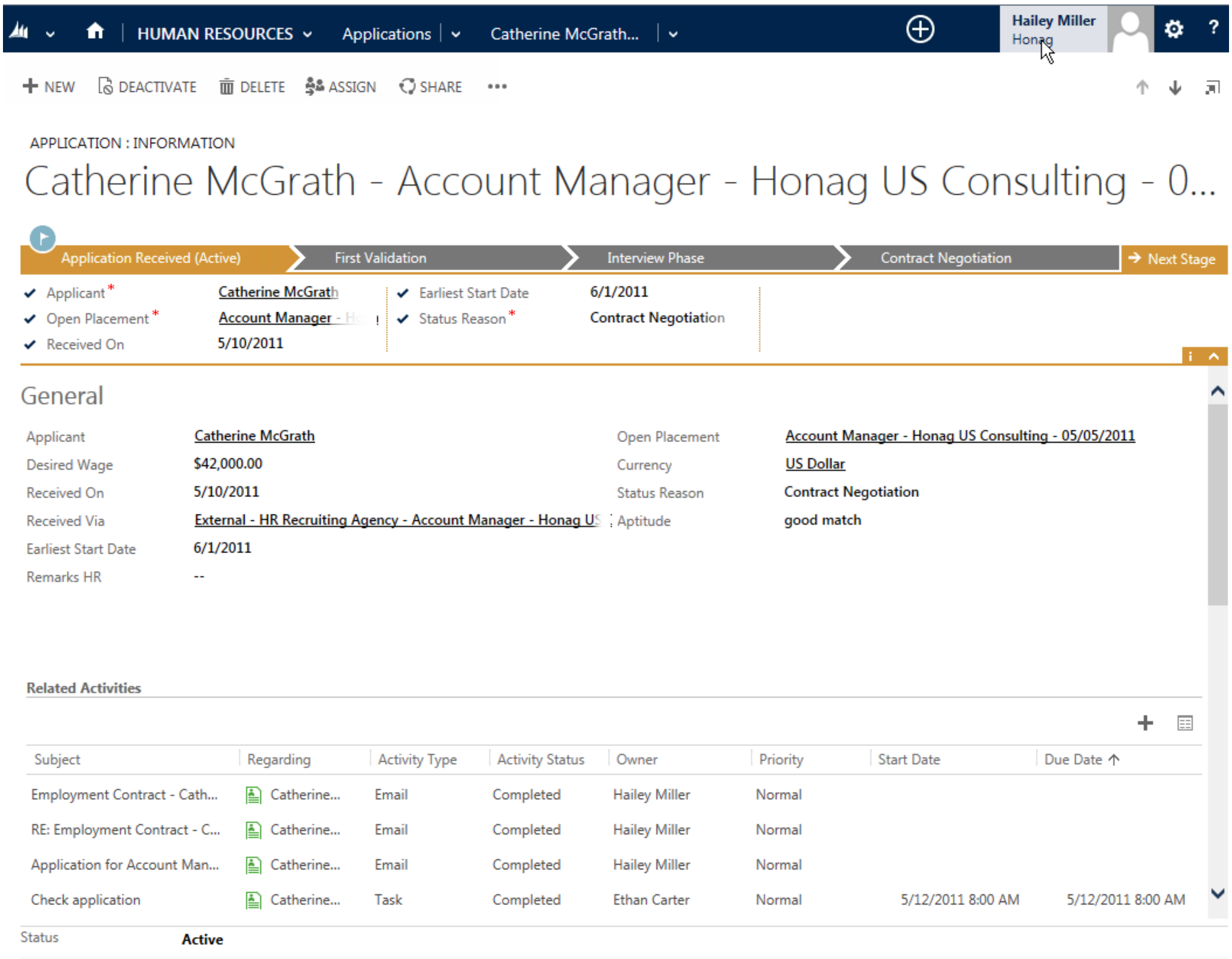
- ***"Recruiting Channel Pool"***.

4.1.4 Applications



As default chart, ***"Applications and Open Placements"*** is displayed in the Outlook start screen of this entity. A column chart shows how many applications belong to how many open placements.

4.1.4.1 Main form



"Applicant": The person who has submitted an application can be selected in this look-up field.

"Open Placement": Here, applications can be connected to the applicable open placement/vacancy.

"Desired Wage": The wage which the applicant desires to receive.

"Currency": Currency of the desired wage.

"Received On": The date when the application was received.

"Received Via": The recruiting channel from the application was received can be selected.

"Status Reason": The user can select a status reason for each application. Here, he/she can choose between

- ***"Received"***,
- ***"First Validation"***,
- ***"Invited for 1st interview"***,
- ***"Invited for 2nd interview"*** and
- ***"Contract Negotiation"***.

"Aptitude": The HR representative may give a first estimate of the applicant's aptitude. He/she may select between

- ***"good match"***,
- ***"average match"*** and
- ***"poor match"***.

"Earliest Start Date": Enter the date from which the applicant can start working here.

"Remarks HR": Any comments or reasons, e.g. for the chosen ***"Status Reason"*** can be entered here.

"Related Activities": All activities which are assigned to this application are shown in this sub-grid.

"Skill Level Quick View": In this sub-grid, a matching between the skill levels necessary for the open placement and those of the applicant is shown.

In order to see the skill levels, the user needs to press the ***"Prepare Rating"*** button on top and save the record. The following use cases may appear:

- A skill is not assigned to a contact (applicant or employee) --> Then, a skill level will be created. The skill level value for the job profile is empty, the required experience value will be taken from the job profile.
- A skill is assigned to a contact and its required experience value is empty or lower than the value for the job profile --> If this is the case, the value for the required value will be changed to the value of the job profile.
- A skill is assigned to a contact and its required experience value is higher than the value for the job profile --> Then, the value for the required value will not be changed.

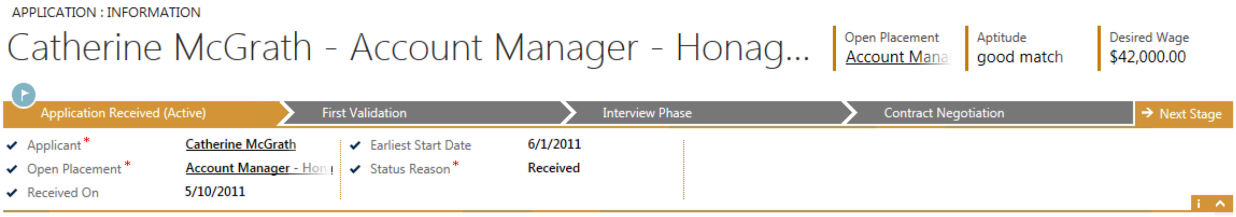
4.1.4.2 Form "Activity"

As ***"Activities"*** are separate entities, please see chapter 6.2 for details.

4.1.4.3 Form "Skill Level"

As ***"Skill Level"*** is a separate entity, please see chapter 4.3.5 for details.

4.1.4.4 Business Process Flow



A default business process flow for applications was created. It includes the following stages and fields:

"Application Received":

- ***"Applicant"***,
- ***"Open Placement"***,
- ***"Received On"***,
- ***"Earliest Start Date"*** and
- ***"Status Reason".***

"First Validation":

- ***"Aptitude"***,
- ***"Cover letter available"***,
- ***"CV available"***,
- ***"Referral available"*** and
- ***"Status Reason".***

"Interview Phase":

- ***"Status Reason".***

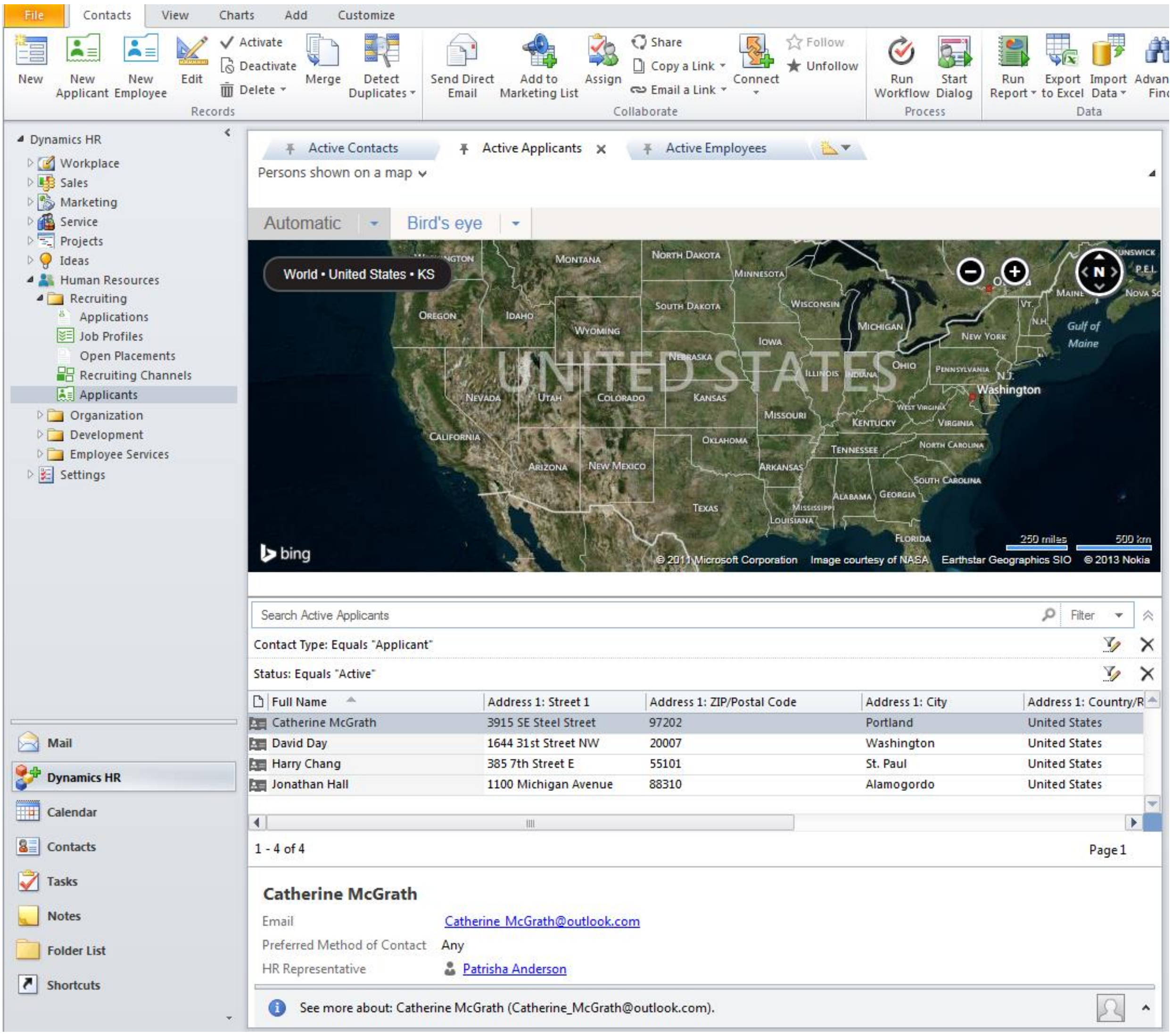
"Contract Negotiation":

- ***"Related tasks completed"*** and
- ***"Negotiations completed".***

Note: *Fields can be added specifically just to the process flow. In addition, they can be on the form as well as on the process flow. If this is the case, entering or changing data in a field will apply for the form and the process flow.*

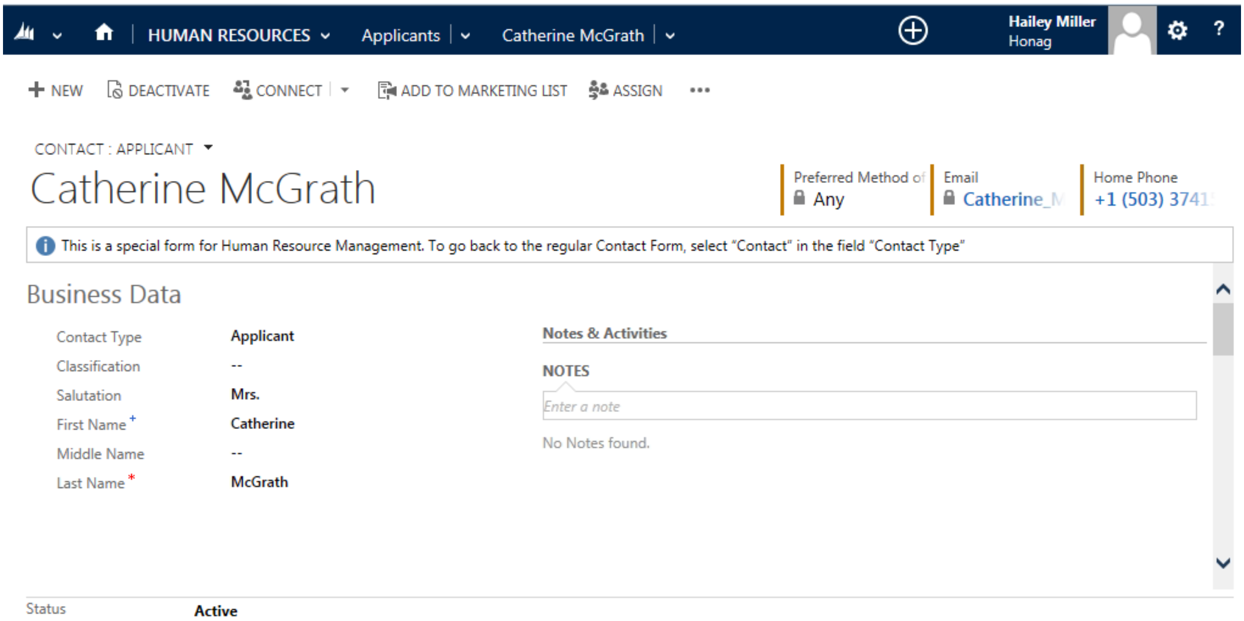
The existing job refusal workflow now runs automatically when the respective application record is deactivated with the status reason ***"Rejected by company + Auto Refusal".***

4.1.5 Applicants



As applicants are part of the entity ***"Contact"***, the user might have to select and pin a respective view concerning applicants as described in chapter 3.

The ***"Chart"*** section shows e.g. in a ***"Bing"*** map where all the applicants are located. Here, ***"Persons shown on a map"*** has to be selected.



To enter and maintain applicant data, we use the Microsoft Dynamics standard ***"Contact"*** entity. Here, business and private data, personal reasons, activities and project management data are included (for e.g.). For clarity, we've hidden several fields which don't generally correspond to HR management or to applicants in detail.

Instead, we've added the field ***"Contact type"***. The user can select from the following types:

- ***"Contact"***,
- ***"Applicant"*** and
- ***"Employee".***

This way, you can easily transfer an applicant to an employee with one click.

When an applicant is created, only the tab ***"Business Data"*** is shown. Only if ***"Interesting Candidate"*** is selected from the picklist ***"Classification"***, the fields of the tabs ***"Private Data"***, ***"Details"*** and ***"Notes & Activities"*** are displayed. This also includes a ***"Bing Maps"*** integration which shows the location of the applicant.

4.2 Employee Organization

The ***"Organization"*** section of ***"xRM1 HR Management"*** provides all relevant employee data. Applicants can easily be converted to employees.

Business units, facilities and equipment can be organized with the corresponding person responsible.

Corresponding wages and salary models are available for every employee.

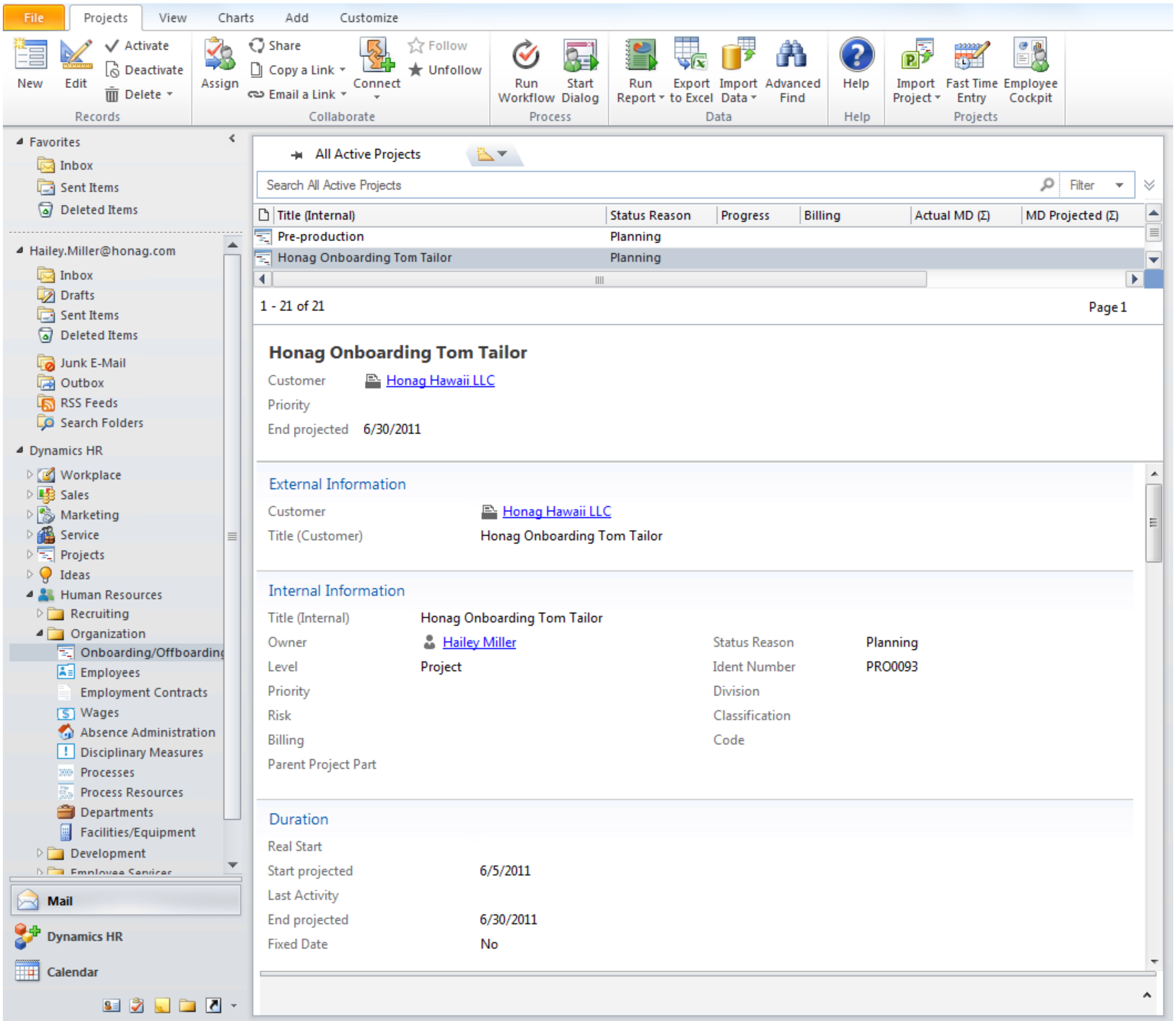
Available processes can be defined and equipped with the employees responsible. Allocate resources and track your processes using the RACI model; this makes resource planning easy!

Employee onboarding and offboarding is easily done with templates. Simply connect to the project management section of ***"CRM-Project"*** and use the available templates.

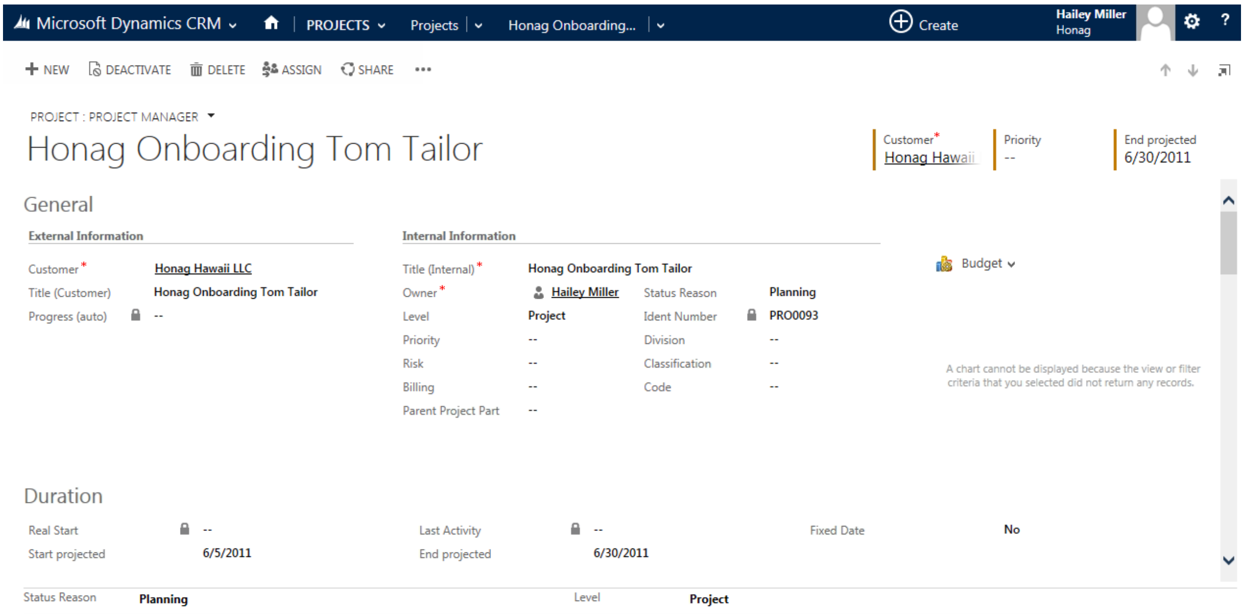
"xRM1 HR Management" enables you to submit absences from one central point in HR management.

Employee contracts and all corresponding information can be easily organized; this can also include disciplinary measures. Add documents or store them directly in your system.

4.2.1 Onboarding/Offboarding



4.2.1.1 Main form



You can find project templates for employee onboarding and offboarding on our website: www.xRM1.com.

For detailed information on how to create a project from a template, please see chapter 4.2.1.2. For an introduction on how to import a project plan from Microsoft Project, please see chapter 4.2.1.3.

Note: *After having created a project from our template, select **"HR Project"** in the **"Classification"** field of the project form. Only then, the project appears in the **"Onboarding/Offboarding Projects"** view.*

Below is an overview of project information which is stored in the system. Information in project data fields, as well as a corresponding project node, is divided into the following categories:

- ***"General":*** General project information.
- ***"Duration":*** Time related information within the project.
- ***"Work":*** All information pertaining to man-days within the project.
- ***"Costs":*** All information pertaining to a project's monetary costs.
- ***"Budget":*** The budget calculated for the project.
- ***"Sales":*** Information pertaining to man-days which were quoted to the customer.
- ***"Description & Notes":*** Information concerning project content, tasks, project goals and more detailed notes.
- ***"Settings":*** Settings and values pertaining to the project.

Note: *Some fields cannot be edited as they are automatically filled in by the system. These write protected fields can be identified by their grey backgrounds.*

4.2.1.2 Creating a project from a template

To create a template from a project, simply select the required project template under the "Templates approved" view and run template process.

There are various automation functions available in the project creation process, to help you create a project as accurately as possible.

Firstly, you can define a ***"date"*** which will be used as a start or end date for the planned project. With this date, the template function pushes all dates forward (for start date) or backward (for end date) for all nodes and activities in the template.

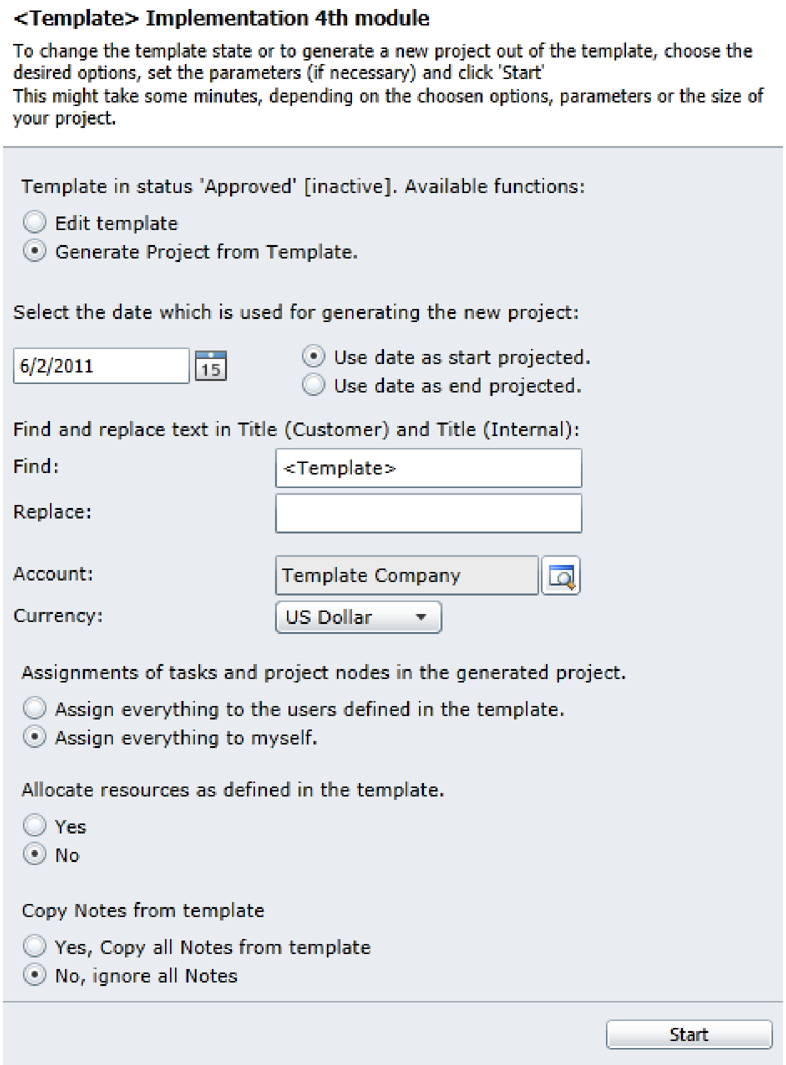
The title of the template (both internal and external), as well as all activities, can be filled automatically with project-related information with the Find and Replace. Specify in the ***"Find"*** field the term you have entered as a placeholder in the nodes and template activities. Specify in the ***"Replace"*** field the term(s) which will be used for replacement.

Select the ***"Account"*** which the newly created project is assigned to.

Select the ***"Currency"*** of the new project.

Select whether all **project parts and activities** are assigned to the users defined in the template or the user running the template function is assigned all project elements. Then, project parts and activities can be distributed manually if required.

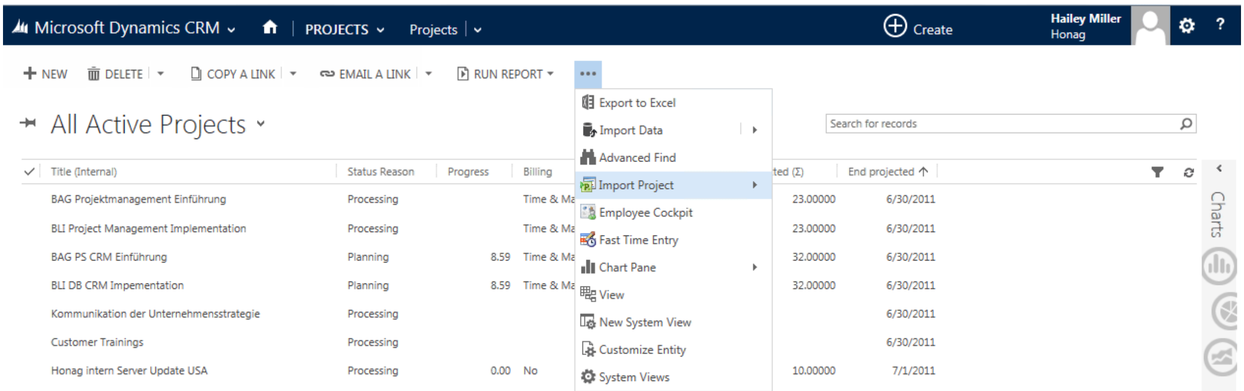
If resources have already been defined in the template via the planning table, the **distribution of work** to these resources can also be used for the new project.



Selecting Start begins the 'project from a template' process. Your predefined project will be generated from the template.

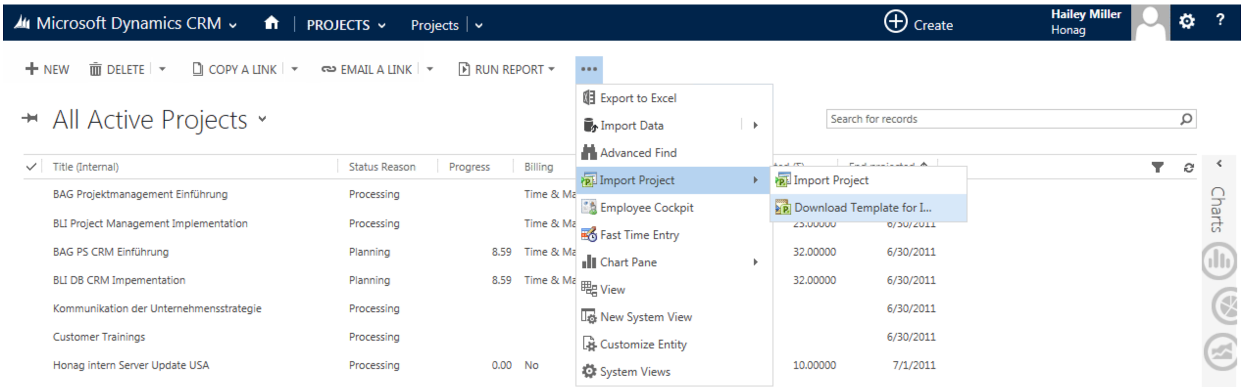
4.2.1.3 Microsoft Project Import

The Microsoft Project interface provides functionality for creating new projects based on Microsoft Project project plans.

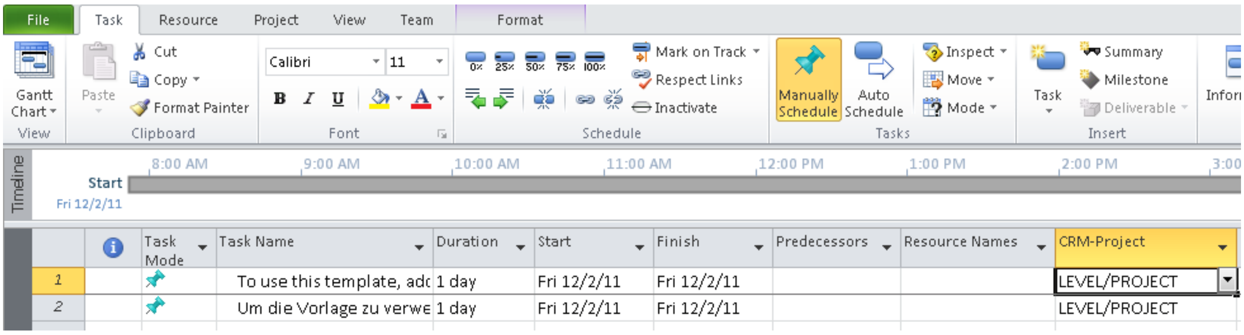


4.2.1.3.1 Prepare Import

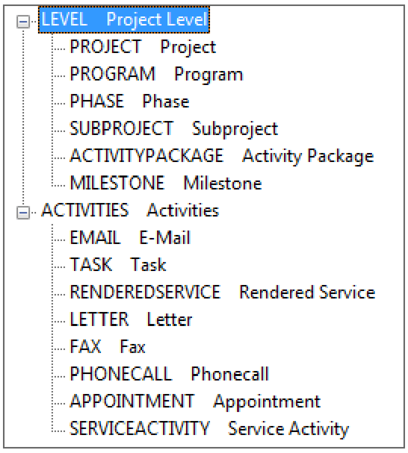
To import a Microsoft Project project plan in CRM-Project, the plan has to first be based on CRM-Project's Microsoft Project import template. Therefore, you must first download the Microsoft Project import template from Microsoft Dynamics.



The system creates a template for Microsoft Project as an XML file. Save this file and open it with Microsoft Project.



Use this template for planning and structuring your project in Microsoft Project. Choose ***"Add new Column"*** to display the column "***Outline 1 (CRM-Project)***". Through this classification, you can define whether each Microsoft Project task is a project node or a Microsoft Dynamics activity. Furthermore, you can select the project node level and activity type.



The following levels are available for classifying project nodes:

- Program
- Project
- Phase
- Subproject
- Activity Package
- Milestone

The following activity types are available for classifying activities:

- E-mail
- Task
- Rendered Service
- Letter
- Fax
- Phone call
- Appointment
- Service activity

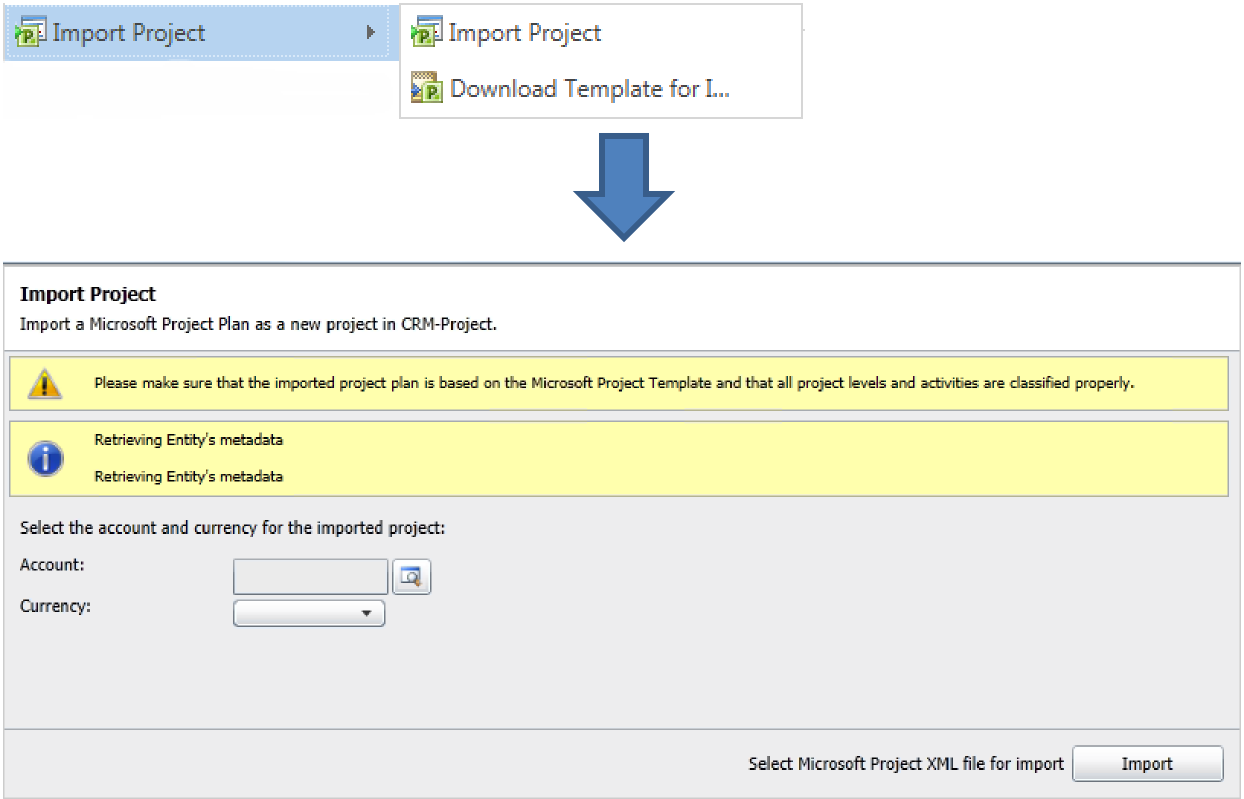
Once you have finished structuring your project, save the project plan in Microsoft Project XML format. The project plan is now ready for ***CRM-Project*** import.

***Note**: CRM-Project is able to import Microsoft Project project plans only if they are based on the import template and if they are saved as Microsoft Project XML format!*

4.2.1.3.2 Process import

To import your prepared project plan, select "Import Project" in the ribbon menu bar. Choose the account which will be the customer for the new CRM-Project project. Then, choose the project's currency. In most cases, an account will be your company or a standard account in your Microsoft Dynamics.

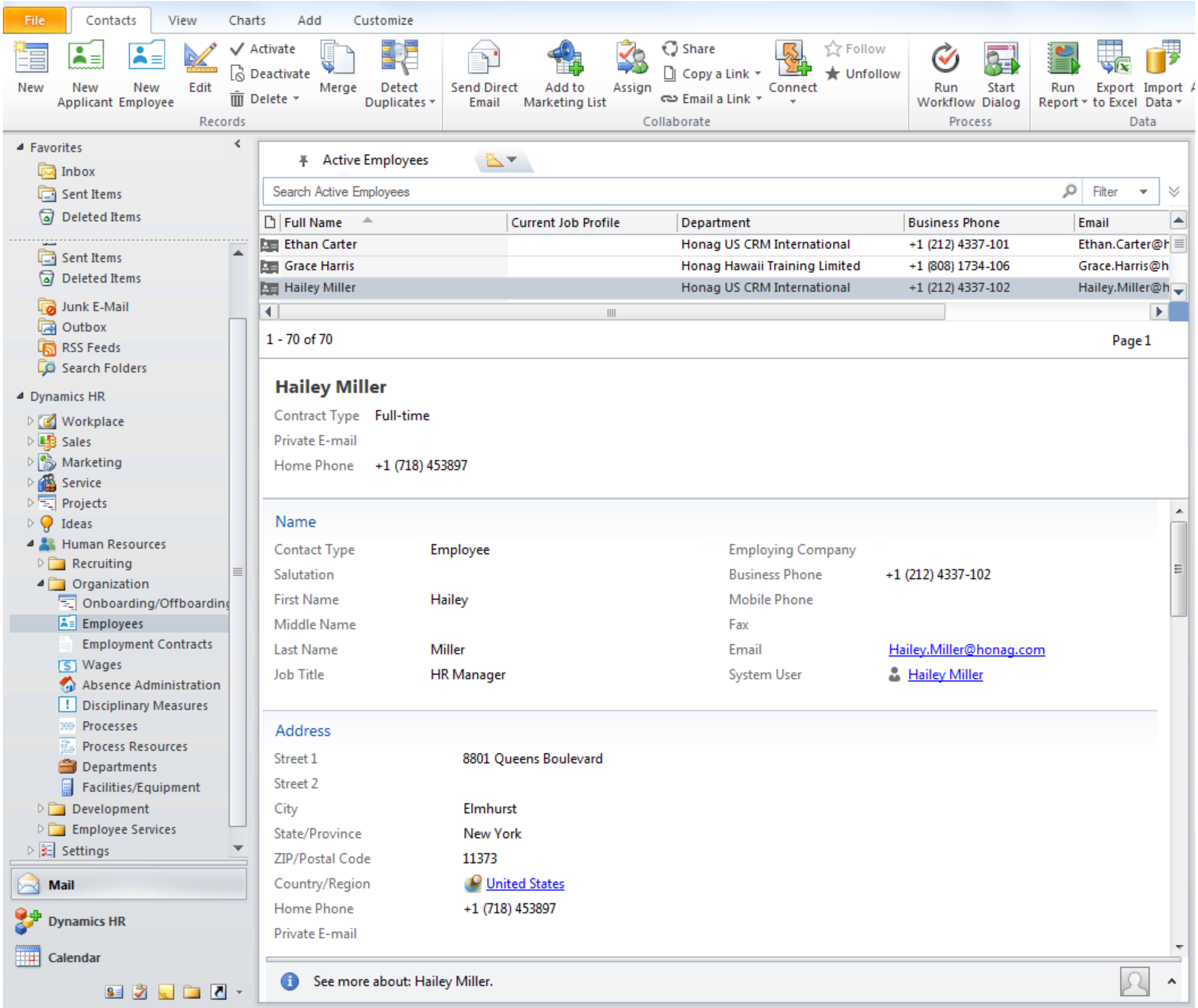
Select ***"Import"*** to select the Microsoft Project file. The project will then be created in CRM-Project and be available as a "Planned Project".



While processing the import, the following information is transferred from the Microsoft Project Project plan to CRM-Project:

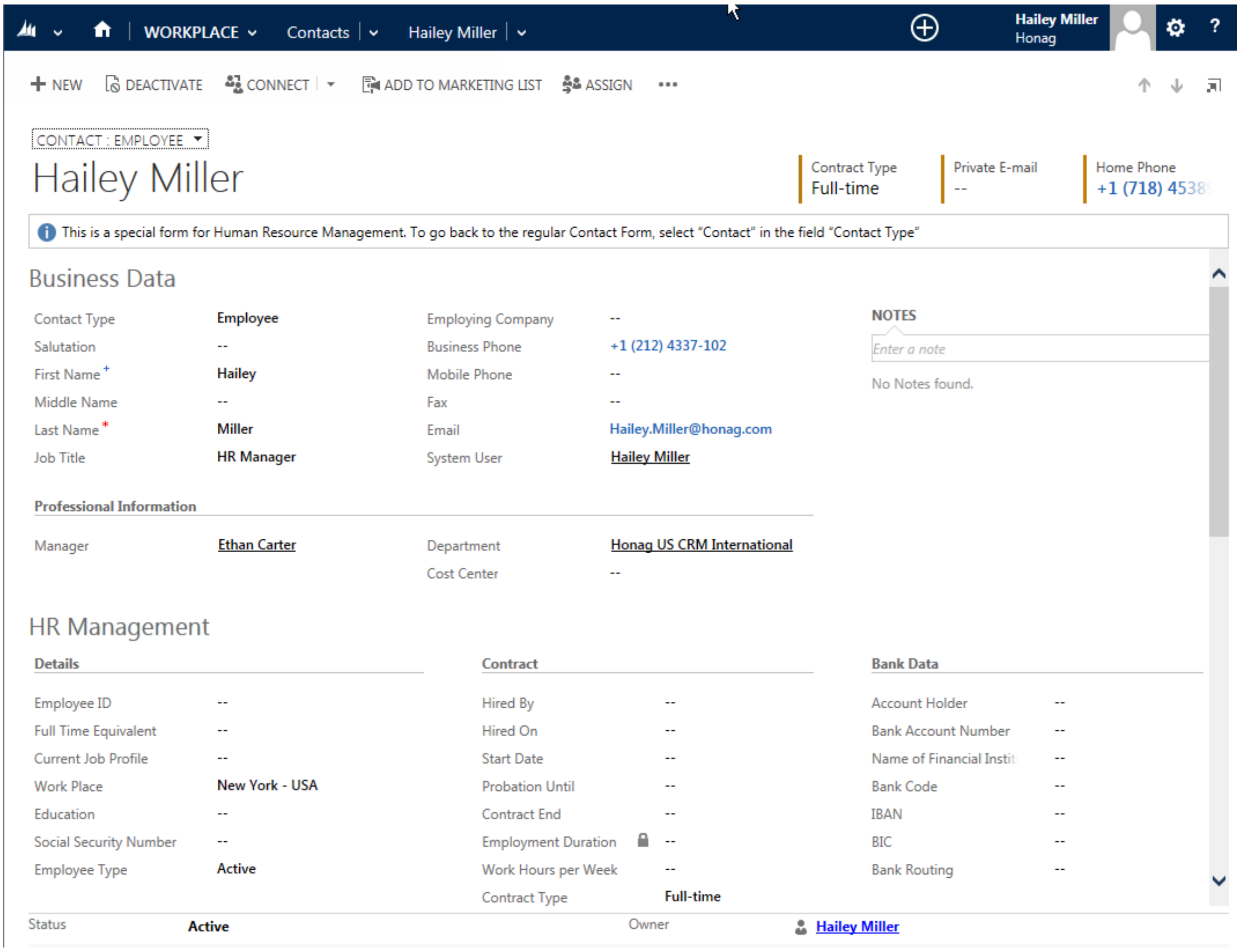
Information in Microsoft Project Plan	Import assigns information to the following Microsoft Dynamics field for Project nodes	Activities
Task Name	Title internal and Title customer	Subject
Notes	Description	Description
Start	Start projected	Start Time (only Appointment and Service Activity)
Finish	End projected	End Time (only Appointment and Service Activity) Due (all other Activity Types)
Work	MD projected (1 MD = 8 hours)	Work
Predecessor	Predecessor	-
Parent Task	Parent Project Part	Regarding
CRM-Project Classification	Level	Defines the Microsoft Dynamics Activity Type

4.2.2 Employees



As employees are part of the entity ***"Contact"***, the user might have to select and pin a respective view concerning employees as described in chapter 3.

The ***"Chart"*** section shows e.g. in a ***"Bing"*** map where all the employees are located. Here, ***"Persons shown on a map"*** has to be selected.



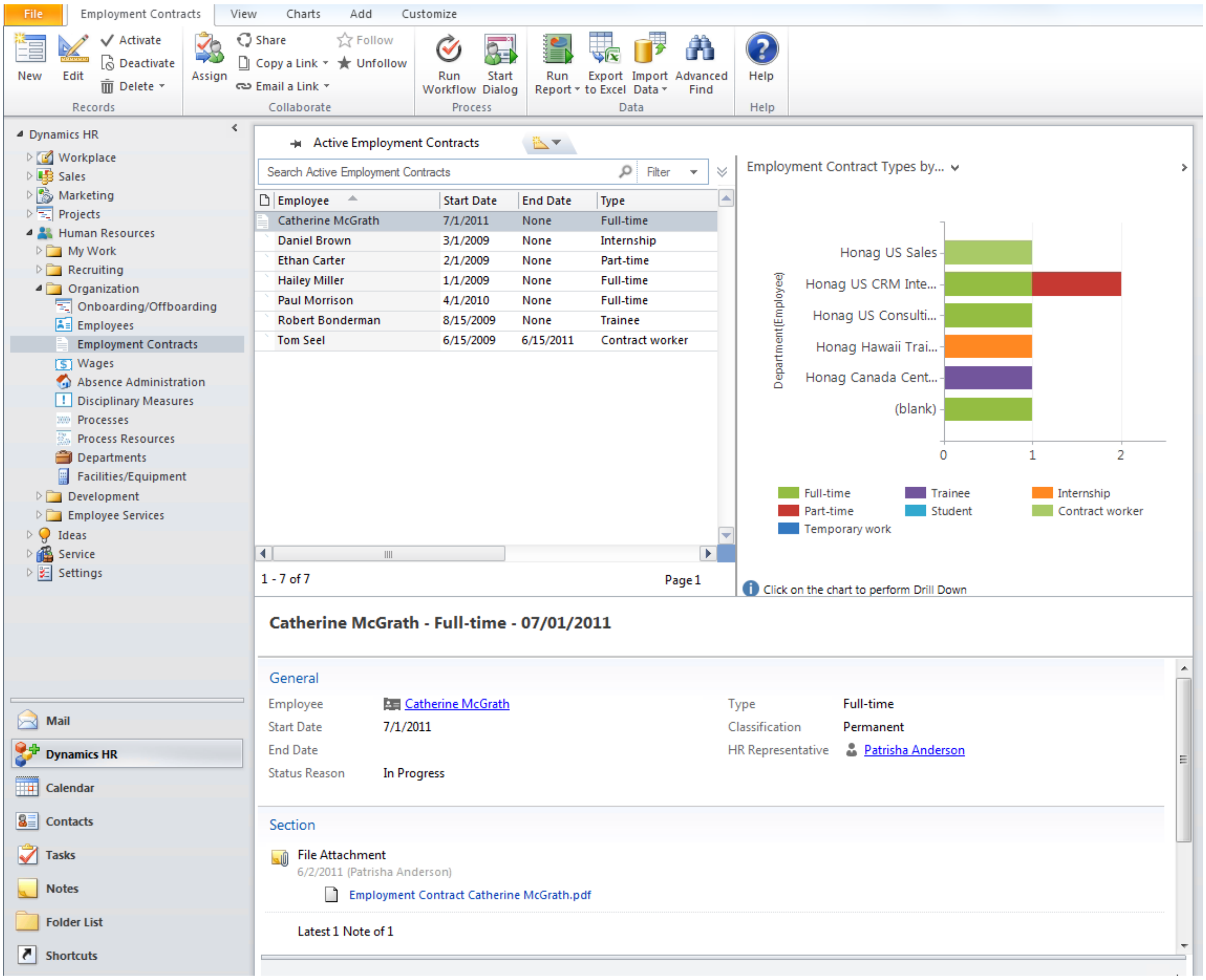
For entering and maintaining employee data, xRM1 uses the Microsoft Dynamics standard entity ***"Contact"***. Business and private data, personal reasons, activities and project management data are all included (for e.g.). For clarity, we've hidden several fields which don't generally correspond to HR management or to employees in detail.

Instead, we've added the ***"Contact type"*** field, as well as the specific ***"HR Management"*** fields, which contain data concerning an employee's contract, HR details, health and bank data and (if applicable) information concerning an employee resignation or dismissal.

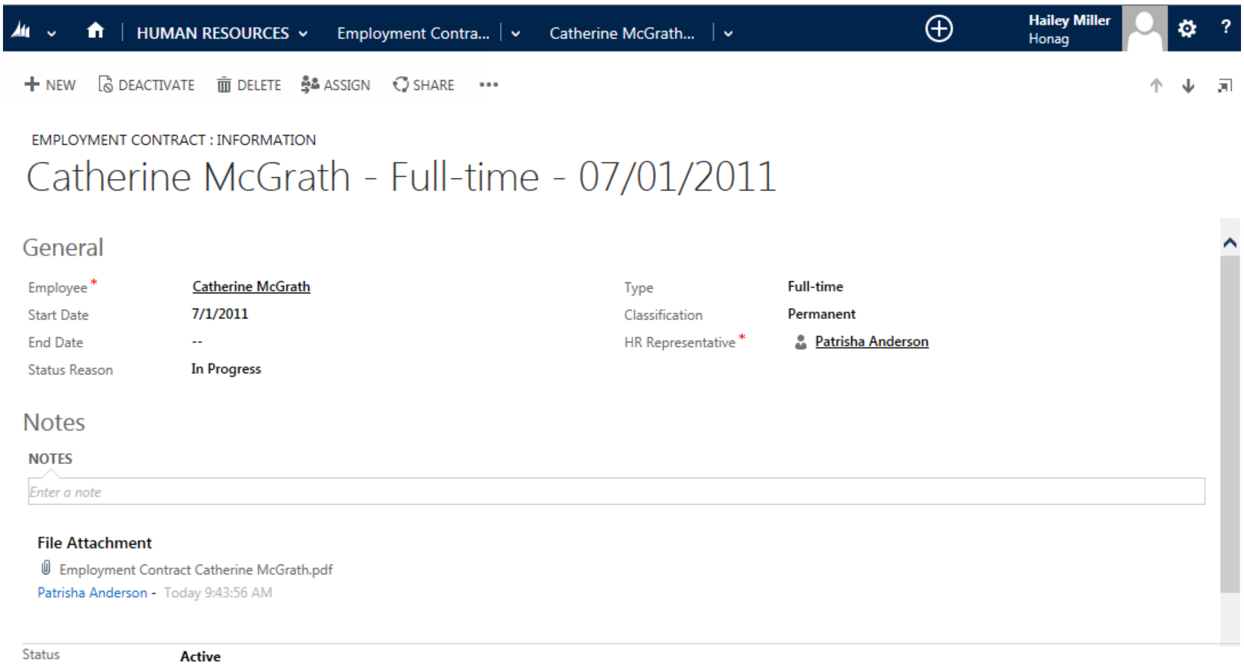
When the fields ***"Start Date"*** and ***"Contract End"*** are changed here, the respective fields in the ***"Job History"*** entity are also updated automatically.

Furthermore, a ***"Bing Maps"*** integration was included which shows the location of the employee.

4.2.3 Employment Contracts



As default chart, ***"Employment Contract Types by Business Unit"*** is displayed in the Outlook start screen of this entity. A bar chart shows which contract types appear how often in the business units.



"Employee": Select which person the employee contract is for.

"Start Date": The day the employee contract starts.

"End Date": The day when the employee contract ends.

"Type": The user may choose from several contract types:

- ***"Full-time"***,
- ***"Part-time"***,
- ***"Temporary work"***,
- ***"Trainee"***,
- ***"Student"***,
- ***"Internship"*** or
- ***"Contract worker"***.

"Classification": Here, the user selects if the employee contract is

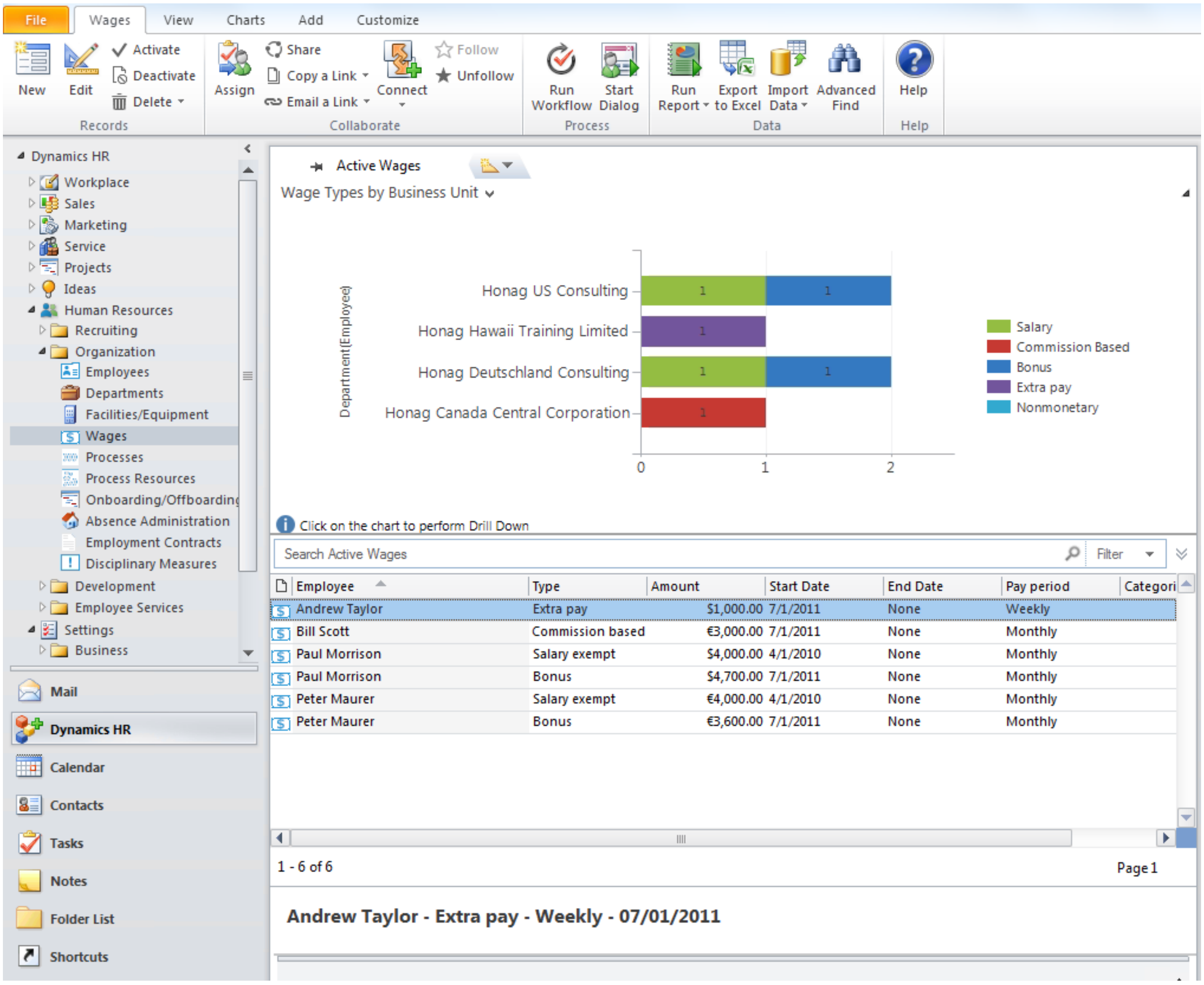
- ***"Permanent"*** or
- ***"Fixed Term"***.

"HR Representative": HR Representative which is responsible for this employment Contract:

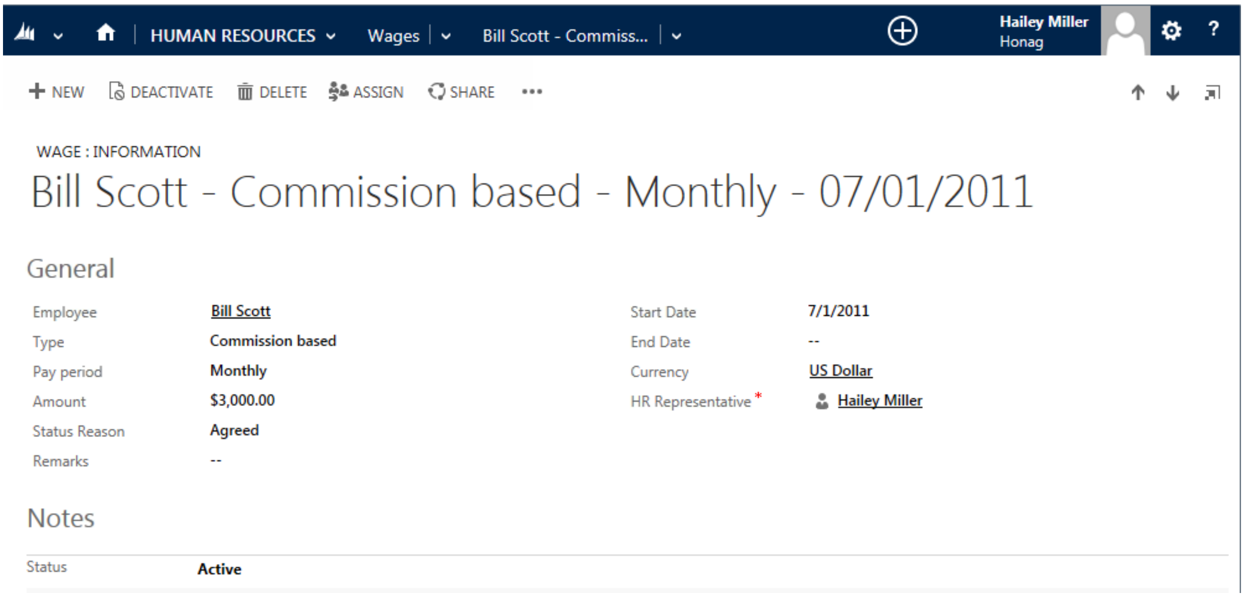
"Status Reason": The user can select a status reason for each employee contract. Here, he/she can choose between

- ***"Draft"***,
- ***"In progress"*** and
- ***"Valid".***

4.2.4 Wages



As default chart, ***"Wage Types by Business Unit"*** is displayed in the Outlook start screen of this entity. A bar chart shows which wage types appear how often in the business units.



"Employee": The person whose wage is displayed.

"Type": Several types of wages can be selected here. The user can choose between:

- ***"Salary exempt"***,
- ***"Salary non-exempt"***,
- ***"Hourly"***,
- ***"Commission based"***,
- ***"Bonus"***,
- ***"Extra pay"*** or
- ***"non-monetary"***.

"Pay period": Enter the payment interval:

- ***"Weekly"***,
- ***"Bi-weekly"***,
- ***"Monthly"***,
- ***"Annually"*** or
- ***"One-time"***.

"Amount": The user can enter the wage amount here.

"Status Reason": The user can select a status reason for each employee contract. Here, he/she can choose between

- ***"Draft"***,
- ***"Agreed"*** and
- ***"In discussion".***

"Start Date": The day, from which the wage is paid.

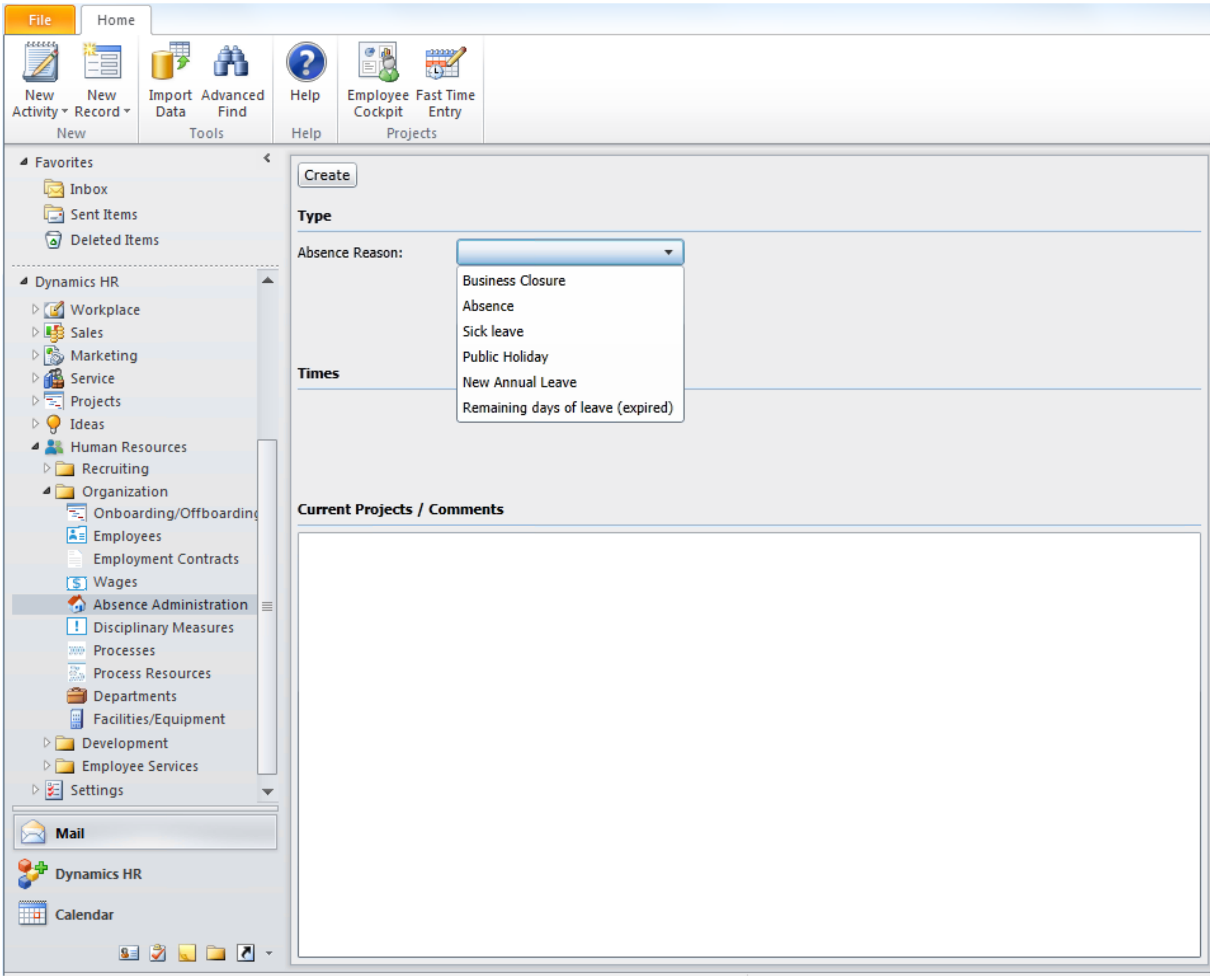
"End Date": The day, until which the wage is paid.

"Currency": The wage currency per unit can be selected here.

"HR Representative": Users can enter the HR manager responsible for employee here.

"Remarks": You can enter any comments concerning wage here.

4.2.5 Absence Administration



After selecting the ***"Absence Administration"*** in Outlook, the goldbright screen which is identical to the one in Microsoft Dynamics appears immediately instead of the Outlook start screen.

"Absence Reason": Here, the user can select what the reason for the absence is:

- ***"Business Closure"***,
- ***"Absence"***,
- ***"Sick leave"***
- ***"Public Holiday"*** or
- ***"New Annual Leave"***.

You can also administer expired ***"Remaining days of leave"***.

"Employee": Choose which employee is absent.

"Times – Start": The day and time the absence starts.

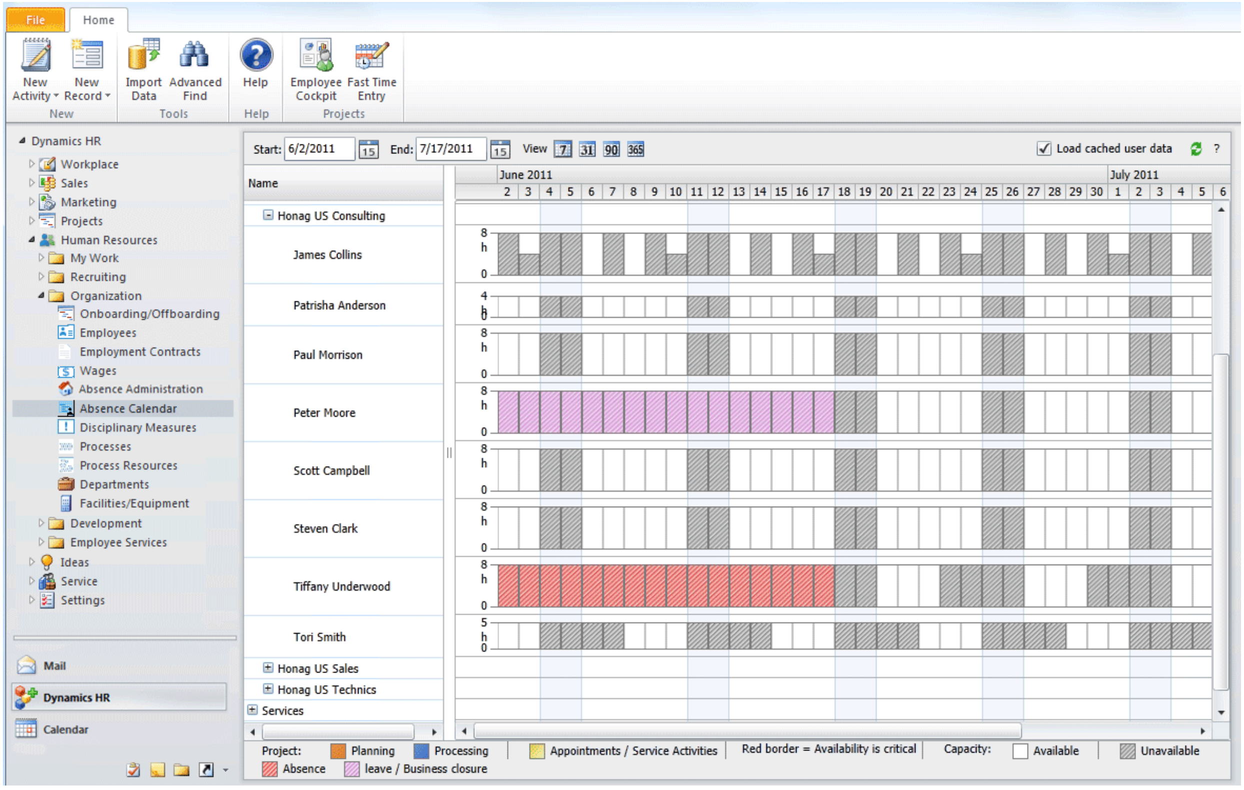
"Times – End": The day and time the absence ends.

"Whole Day Event": If the absence is compiled of full work days, the user has to select this box.

"Days"/"Days of leave": The user can enter the amount of absence days here.

For absence administration settings, please see chapter 2.1.

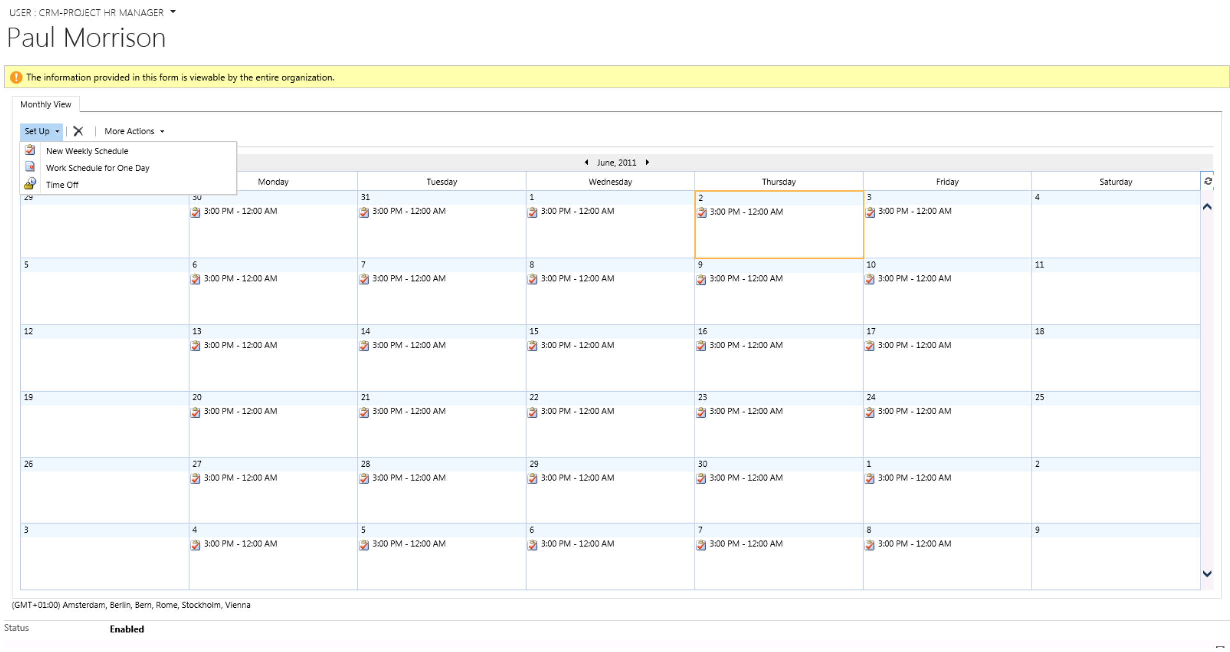
4.2.6 Absence Calendar

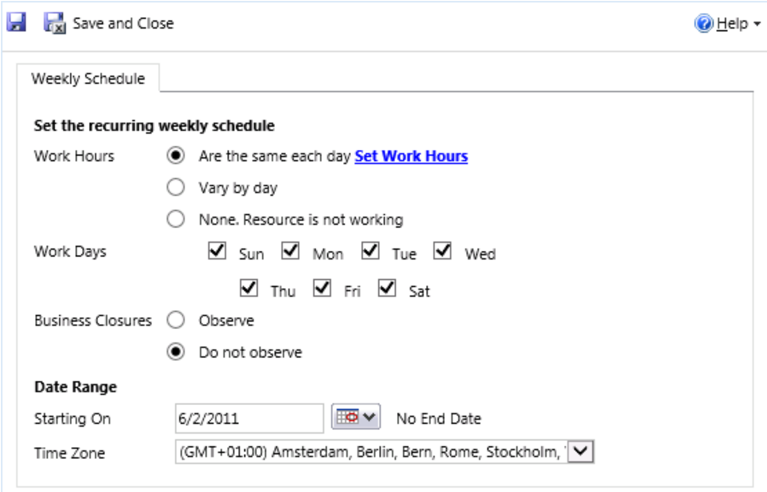


4.2.6.1 Prerequisites

The fundamental prerequisite for the absence calendar are up-to-date information on the availability of existing resources, especially in terms of attendance, leaves and sickness. This is why the following settings concerning employee work hours must be configured beforehand in the system.

For information on the availability of employees to be shown correctly, the work hours of employees must be set correctly in the system. This is a standard function of Microsoft Dynamics. The settings must be configured in the calendar of individual users.





***Note**: Always set the selection to **"Observe"** in the **"Business closures"** area to ensure that public holidays and vacation are shown correctly in resource planning.*

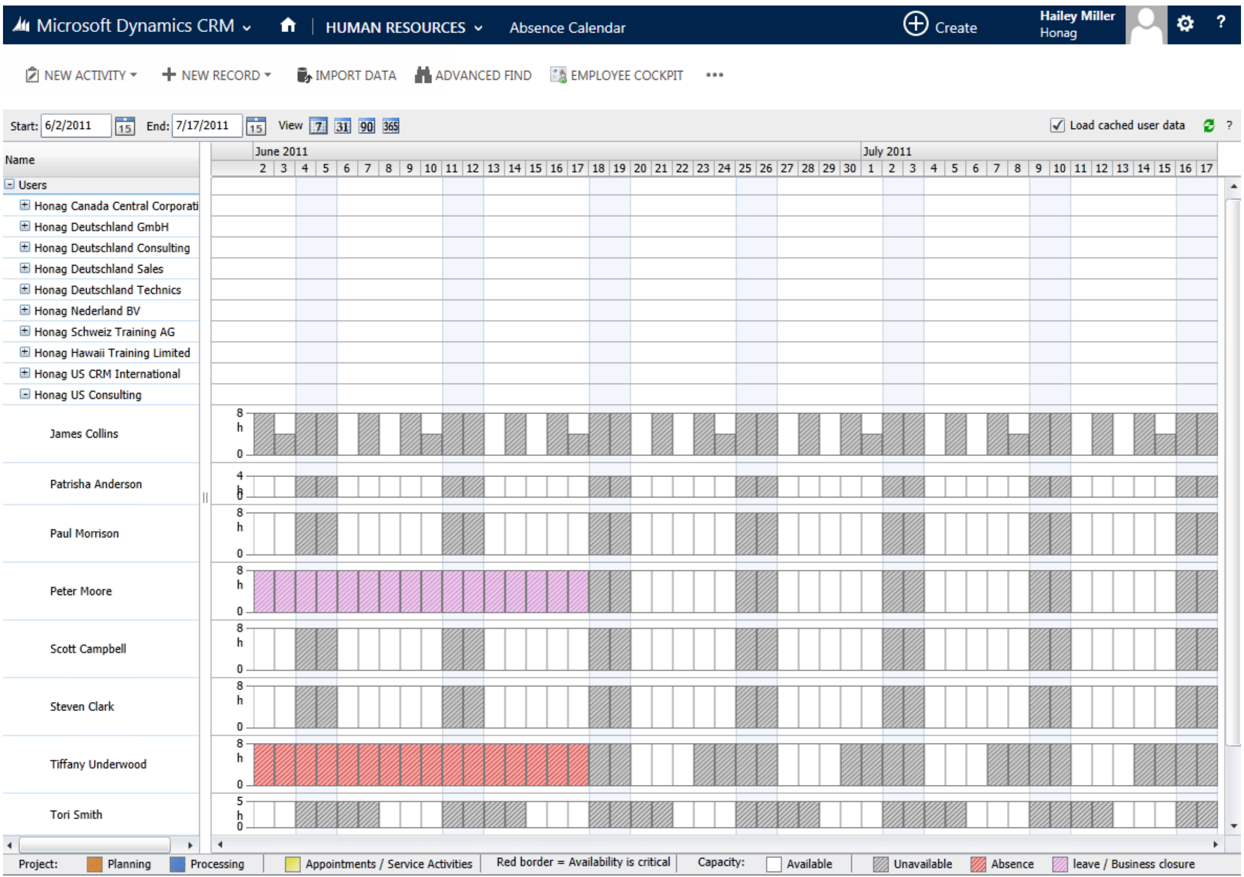
4.2.6.2 Form

This view displays the availability of all employees. Work hours per day, attendances, absences, leaves/business closure and unavailability are shown in different colors:

- white = ***"Available"***,
- grey = ***"Unavailable"***,
- red = ***"Absence"*** and
- purple = ***"Leave/Business Closure"***.

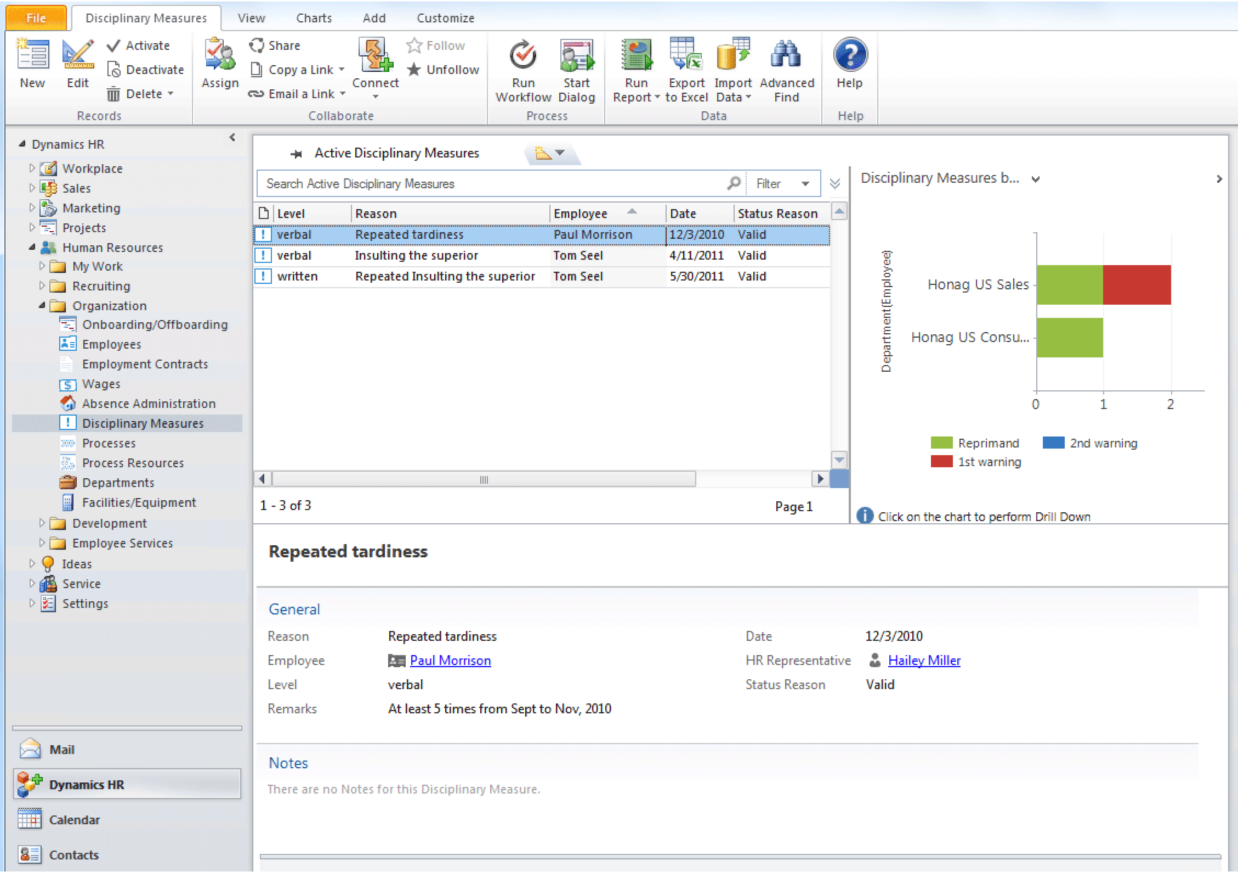
Therefore, employees can be scheduled faster and more easily. All parts of a useful workforce management can be seen at a glance.

***Note**: When you use **"CRM-Project"** as well, the **"Absence Calendar"** shows besides attendances and leaves also the resource usage.*

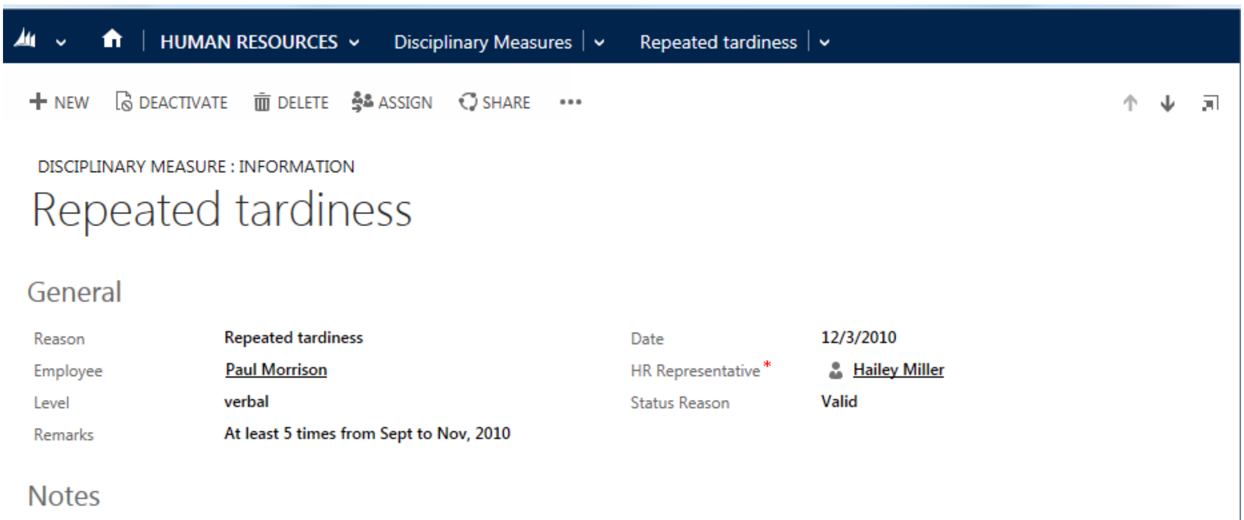


***Tip**: For more details on the activities scheduled for an employee on a particular day, simply move the mouse to that day; displayed next to the mouse, as a tool, is the specific day schedule.*

4.2.7 Disciplinary Measures



As default chart, ***"Disciplinary Measures by Business Unit"*** is displayed in the Outlook start screen of this entity. A bar chart shows how many disciplinary measures of which level were given in the business units.



"Reason": Define a specific reason for the disciplinary measure here.

"Employee": Select which person receives the disciplinary measure.

"Level": The user may choose from several levels:

- ***"verbal"***,
- ***"written"*** or
- ***"terminated"***.

"Date": The day when the disciplinary measure was given.

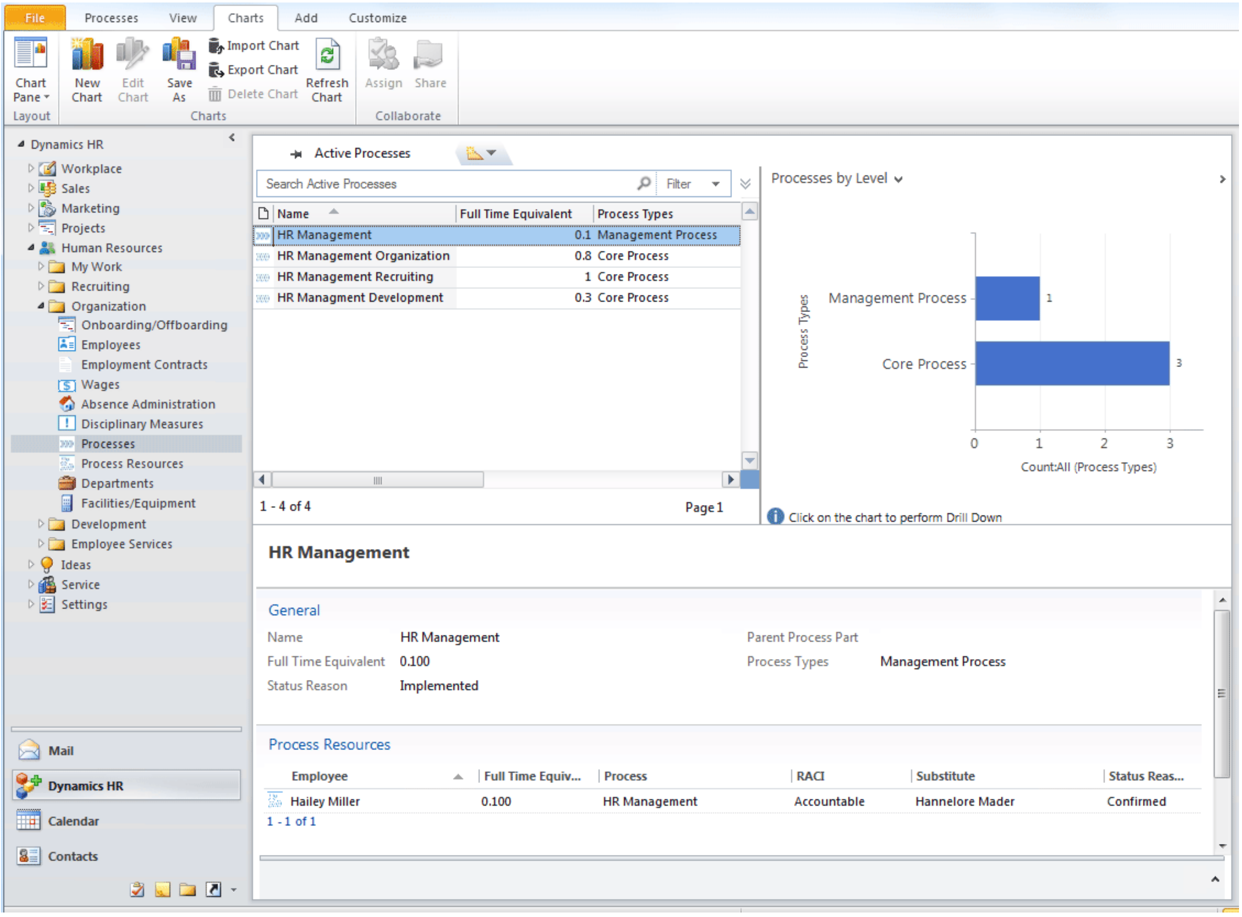
"HR Representative": HR Representative who is responsible for the disciplinary measure.

"Status Reason": The user can select a status reason for each measure. Here, he/she can choose between

- ***"Draft"***,
- ***"In progress"*** and
- ***"Valid".***

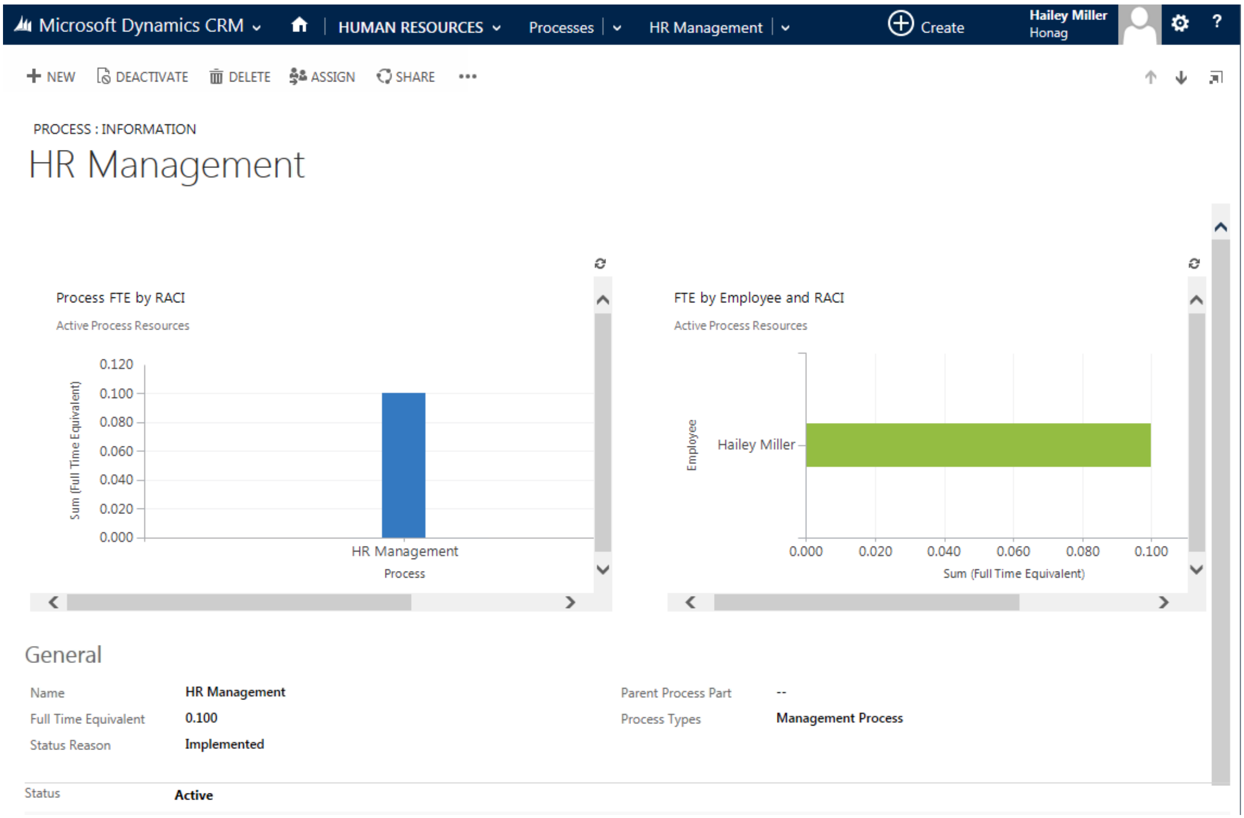
"Remarks": Describe the reprimand in more detail or add any additional comments in this field.

4.2.8 Processes



As default chart, ***"Process by Level"*** is displayed in the Outlook start screen of this entity. A bar chart shows how many processes call a certain level.

4.2.8.1 Main form



On top of the main form, two additional charts are shown:

The column chart ***"Process FTE by RACI"*** shows how many FTE are connected with which RACI level per process.

The bar chart ***"FTE by Employee and RACI"*** displays how many FTE are connected with which RACI level per employee.

Besides these charts, the following fields are on the form:

"Name": Enter the name of the process.

"Parent Process Part": If the process is attached to a parent process part, the user may select the parent here.

"Full Time Equivalent": Enter how many full time equivalents (FTE) the process consists of.

"Process Types": The user may select from the following process types:

- ***"Management Process"***,
- ***"Core Process"*** or
- ***"Supporting Process".***

"Status Reason": The user can select a status reason for each process. Here, he/she can choose between

- ***"Draft"***,
- ***"In Implementation"*** and
- ***"Implemented".***

"Process Resources": can be entered in the following sub-grid.

4.2.8.2 Form "Process Resource"

As ***"Process Resource"*** is a separate entity, please see 4.2.9 for more information.

4.2.8.3 Trigger

For each process, the user may use a trigger. The trigger can be found by clicking on ***"..."*** --> ***"Other activities"*** --> ***"Trigger"*** in the ***"Process"*** form. A trigger includes the following fields:

"Subject": A subject is mandatory for each trigger. Besides, there is a text field so that more information can be provided.

"Process": Here, the user may enter the respective process for the trigger. If the trigger is created from a ***"Process"*** record, this field is filled automatically with the content of the ***"Regarding"*** field.

"Regarding": Here, the user may enter a regarding object for the trigger. If the trigger is created from a ***"Process"*** record, this field is filled automatically with the respective process.

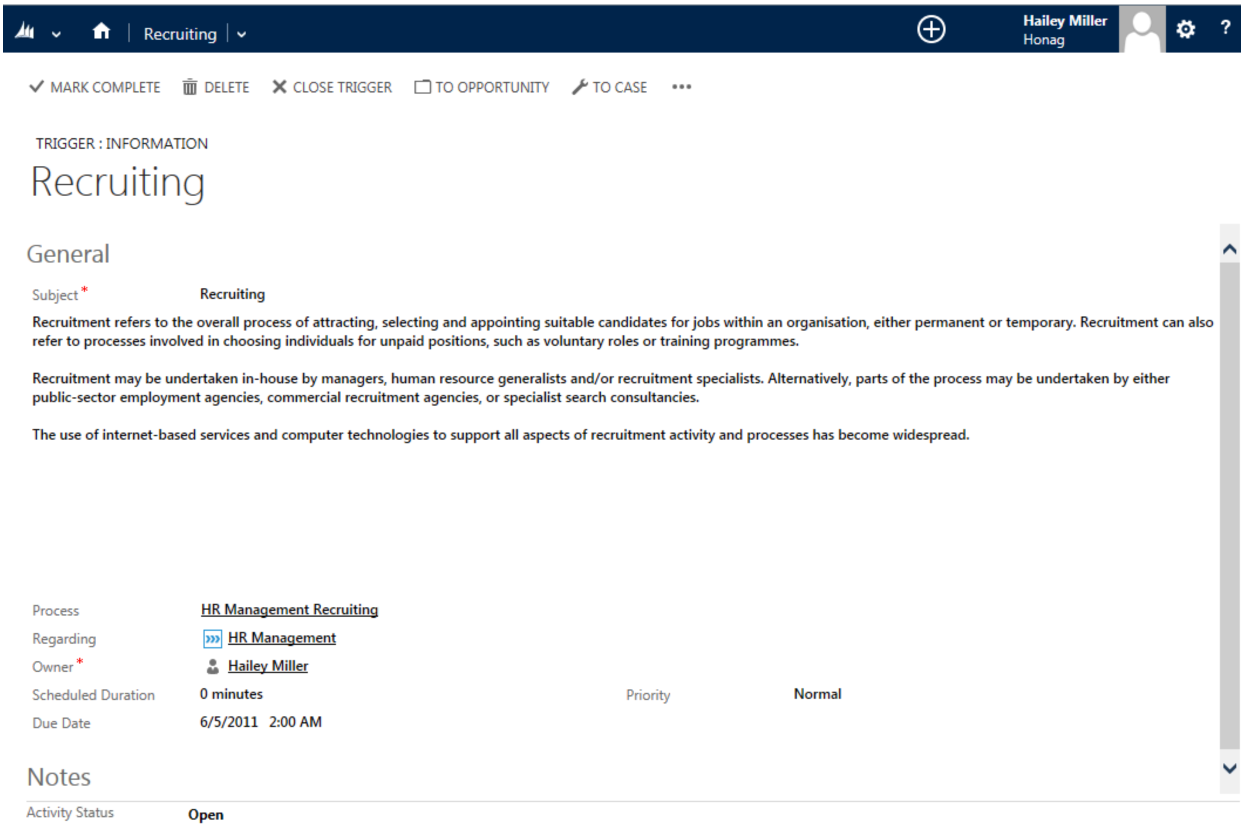
"Owner": The owner of the trigger is shown here.

"Scheduled Duration": The duration can be selected of a pick-list.

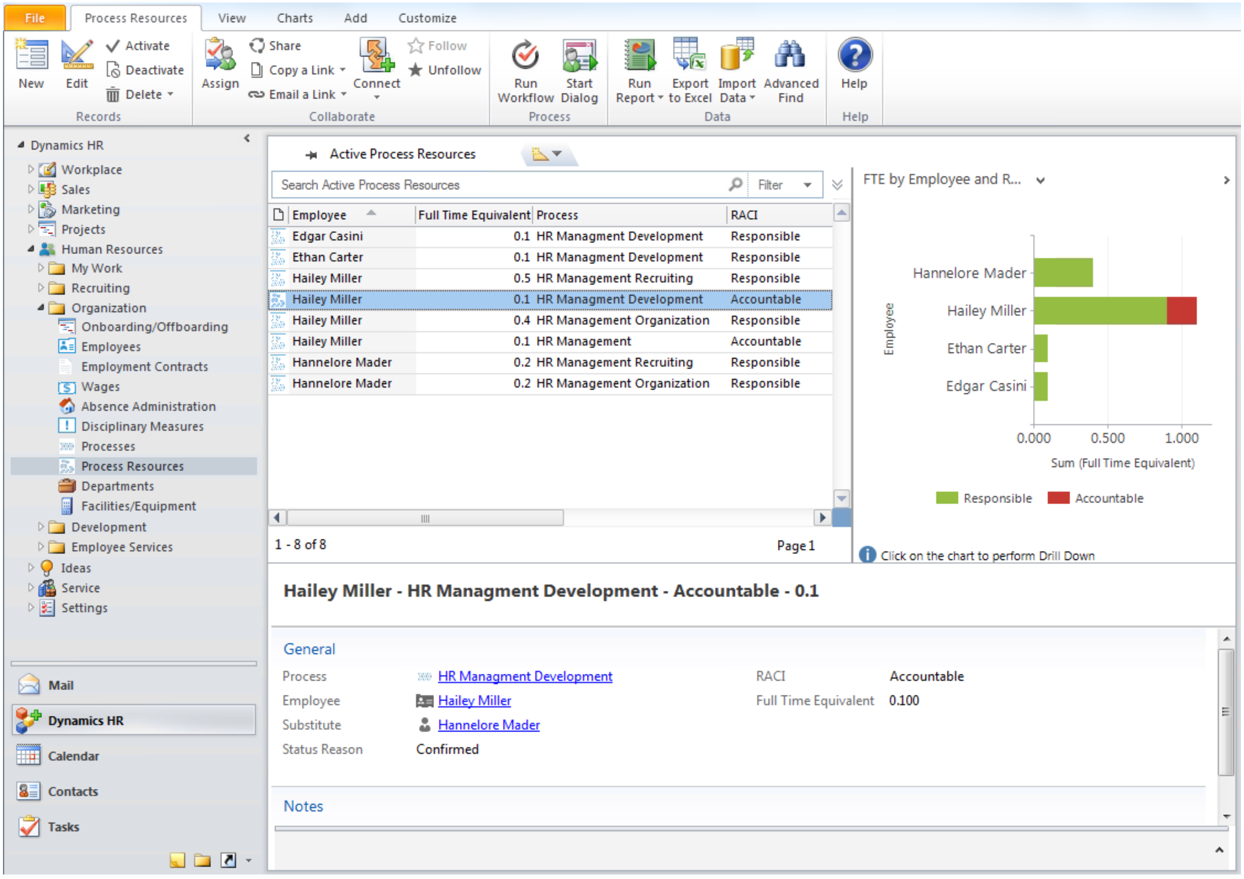
"Due Date": A due date can also be chosen.

"Priority": The user may prioritize the trigger in term of

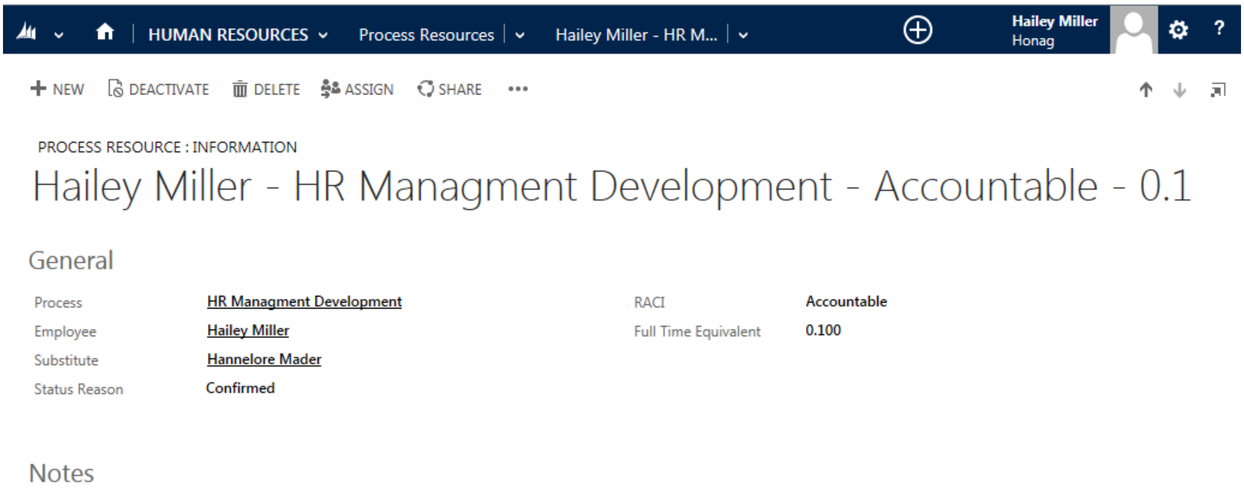
- ***"Low"***,
- ***"Normal"*** and
- ***"High".***



4.2.9 Process Resources



As default chart, ***"FTE by Employee and RACI"*** which was described above, is displayed in the Outlook start screen of this entity.



"Process": The process which the resource is attached to can be selected here.

"Employee": Select the person which is the process resource, in this field.

"Substitute": If the chosen employee is not available, the here entered person is his/her substitute.

"RACI": RACI defines the responsibility of a resource for certain process tasks. Thus, the user may select whether the process resource is

- ***"Responsible"***,
- ***"Accountable"***,
- ***"Consulted"*** or
- ***"Informed"***.

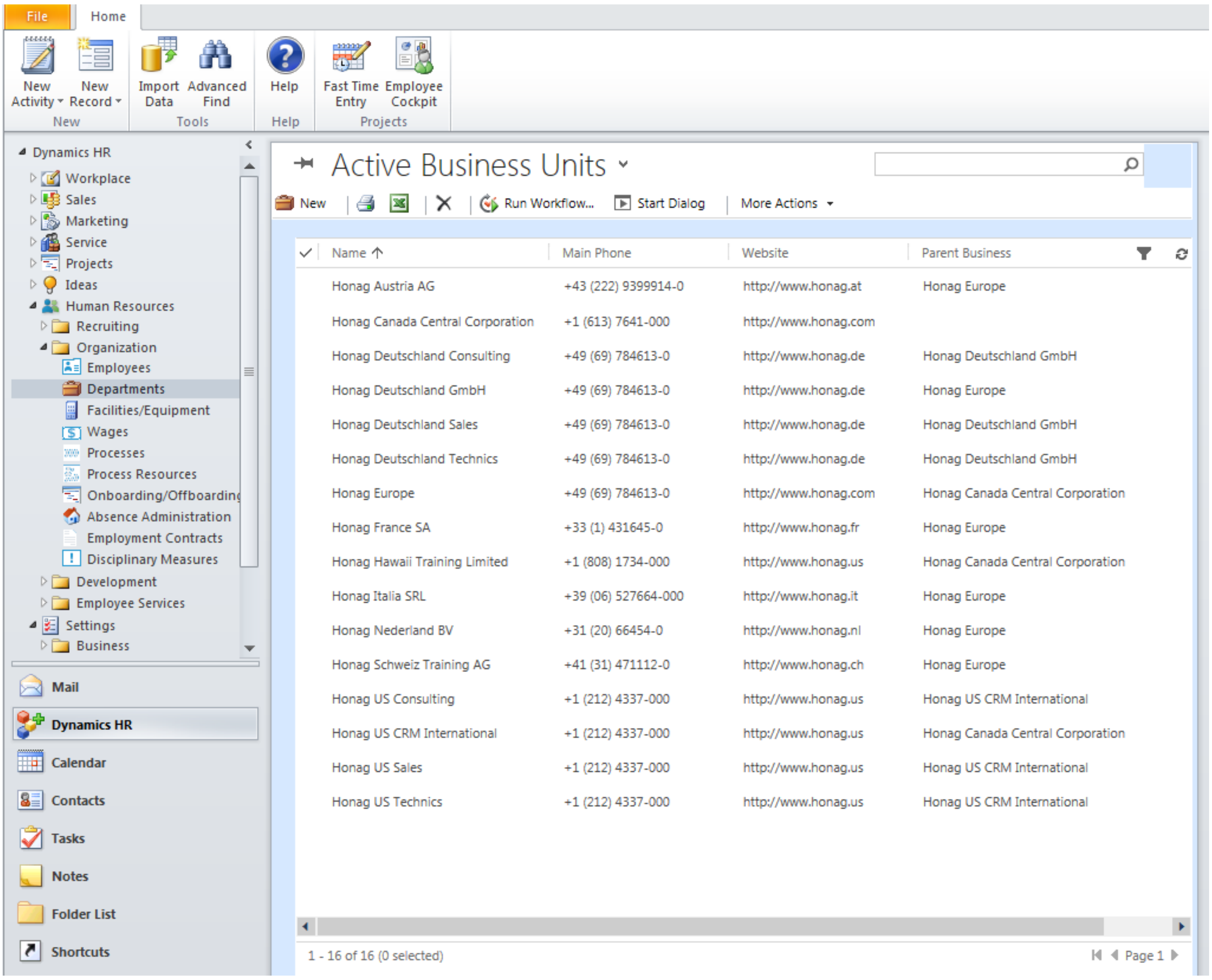
"Full Time Equivalent": Here you can enter how much time, in terms of full time equivalent (FTE), the process resource is taking in the process.

"Approved by": Each process resource needs to be approved.

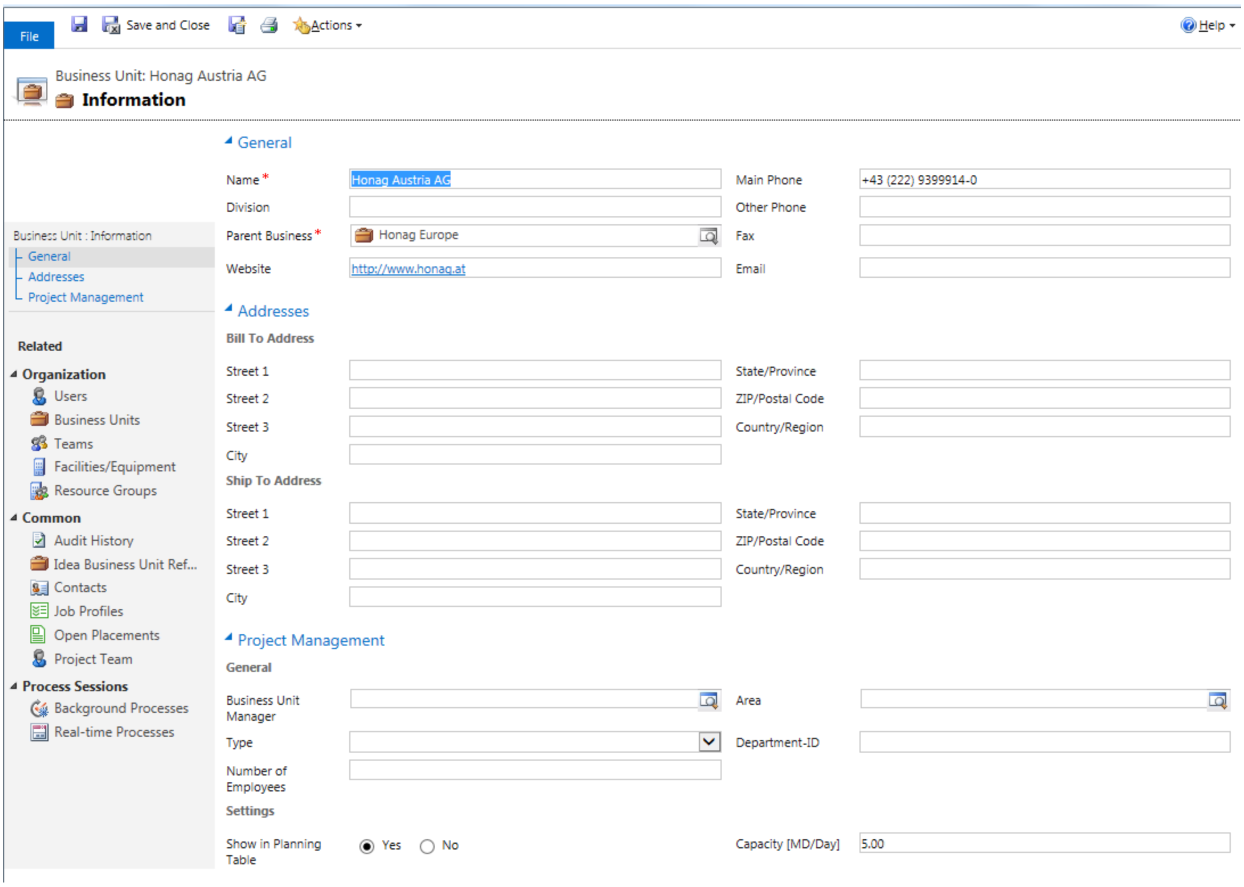
"Status Reason": The user can select a status reason for each process resource record. Here, he/she can choose between

- ***"Draft"***,
- ***"In Implementation"*** and
- ***"Implemented".***

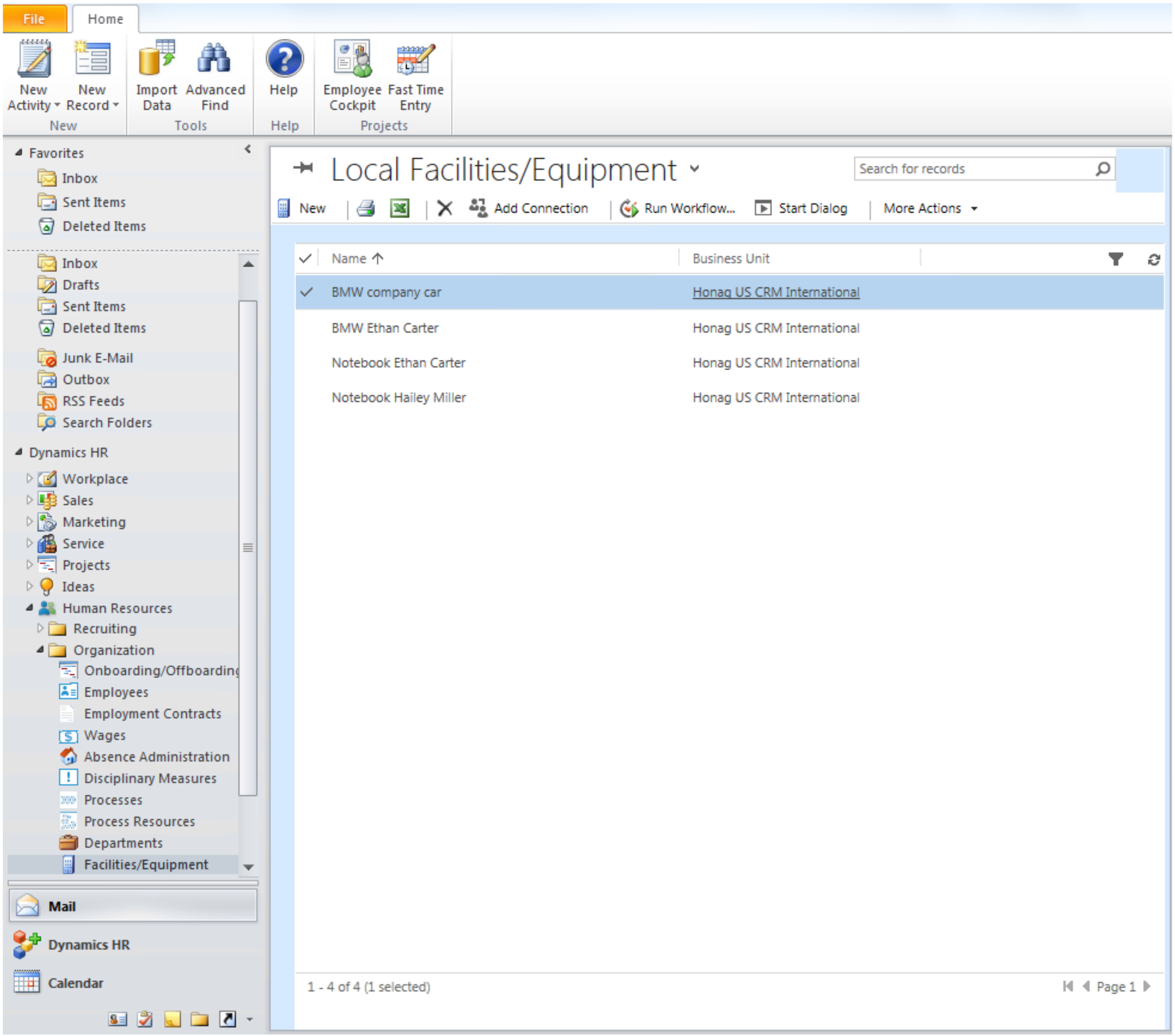
4.2.10 Departments

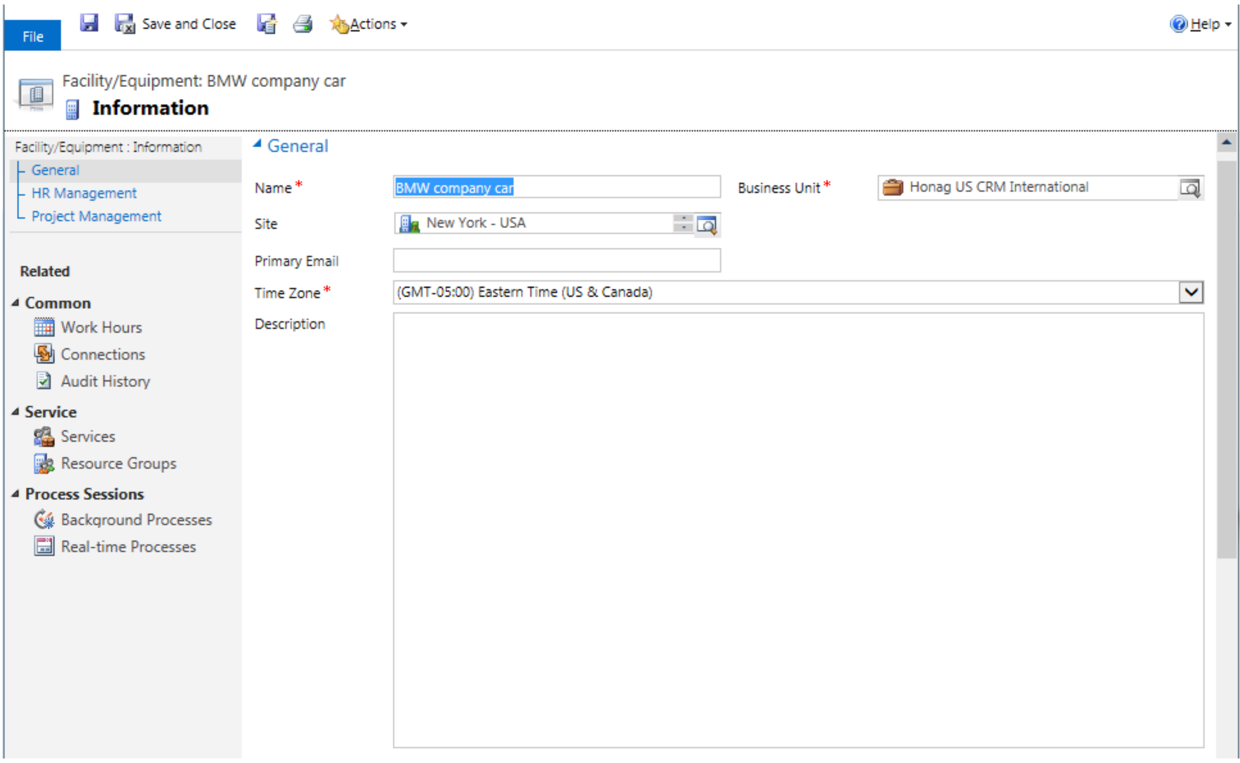


For ***"Departments"***, we use the Microsoft Dynamics standard entity ***"Business Unit"***. This entity contains general information about a department, its address data and the corresponding project management fields.


File
Save and Close
Actions
Help
Business Unit: Honag Austria AG
Information
Business Unit : Information
General
Addresses
Project Management
Related
Organization
Users
Business Units
Teams
Facilities/Equipment
Resource Groups
Common
Audit History
Idea Business Unit Ref...
Contacts
Job Profiles
Open Placements
Project Team
Process Sessions
Background Processes
Real-time Processes
General
Name *
Honag Austria AG
Division
Parent Business *
Honag Europe
Website
http://www.honag.at
Main Phone
+43 (222) 9399914-0
Other Phone
Fax
Email
Addresses
Bill To Address
Street 1
Street 2
Street 3
City
State/Province
ZIP/Postal Code
Country/Region
Ship To Address
Street 1
Street 2
Street 3
City
State/Province
ZIP/Postal Code
Country/Region
Project Management
General
Business Unit Manager
Area
Type
Department-ID
Number of Employees
Settings
Show in Planning Table
Yes
No
Capacity [MD/Day]
5.00

4.2.11 Facilities/Equipment





"Name": Give a name to facilities/equipment here.

"Business Unit": Here you can select the respective business unit or department to which a resource belongs.

"Site": Select which site the facility/equipment is located. The site is the location of the respective business unit.

"Primary E-Mail": Primary e-mail address of the selected business unit.

"Time Zone": The user can select the time zone of the site where the facility/equipment is located.

"Description": A detailed description of the resource and its usage can be entered here.

"Expense per Unit": Here you can insert the budget per unit, when using the resource.

"Currency": The expense currency per unit can be selected here.

4.3 Employee Development

See individual employee and applicant job histories in the ***"Development"*** section.

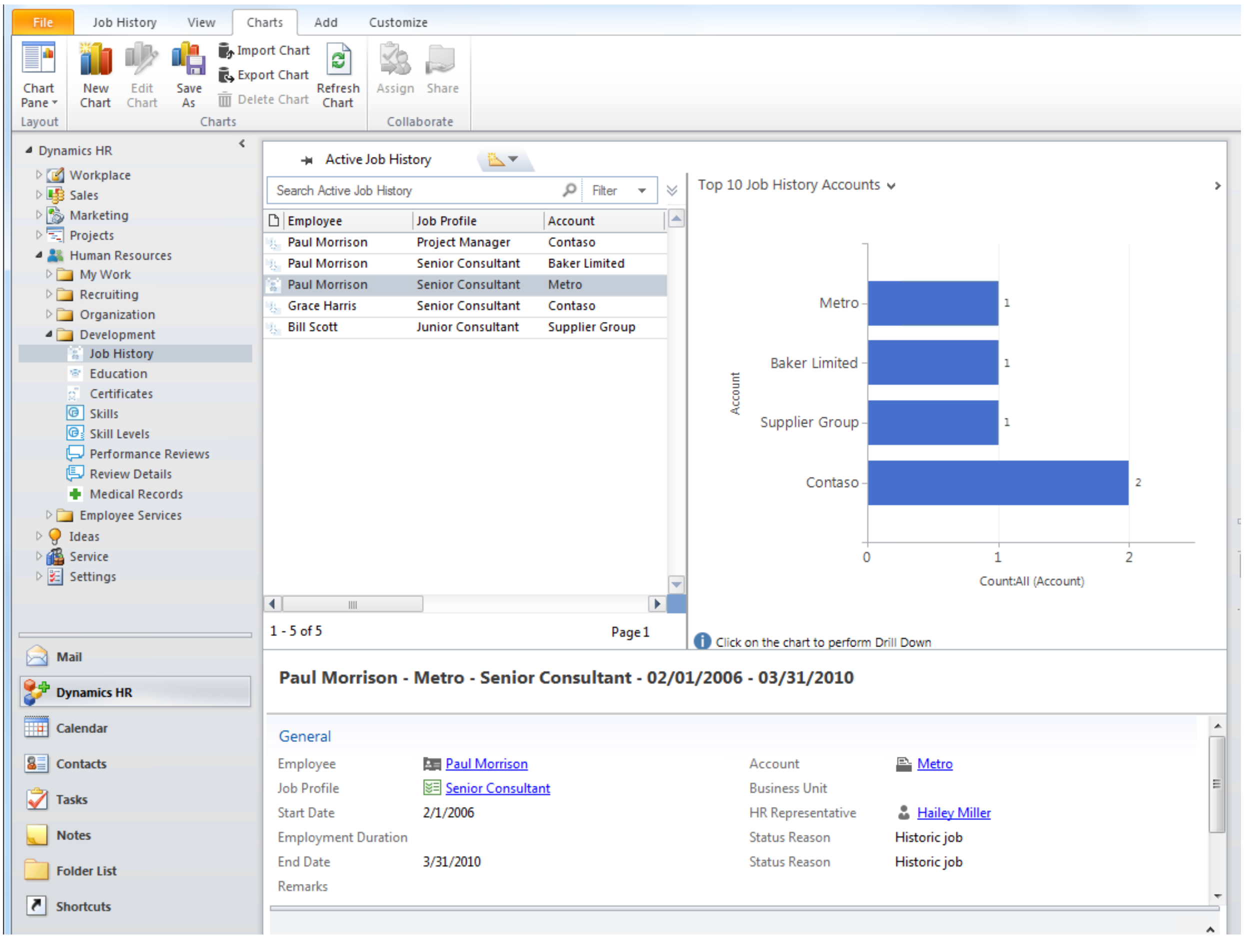
Organize required skills and competences. In addition, you can track employee skill levels and development targets.

When necessary, prior and future health checks can be listed.

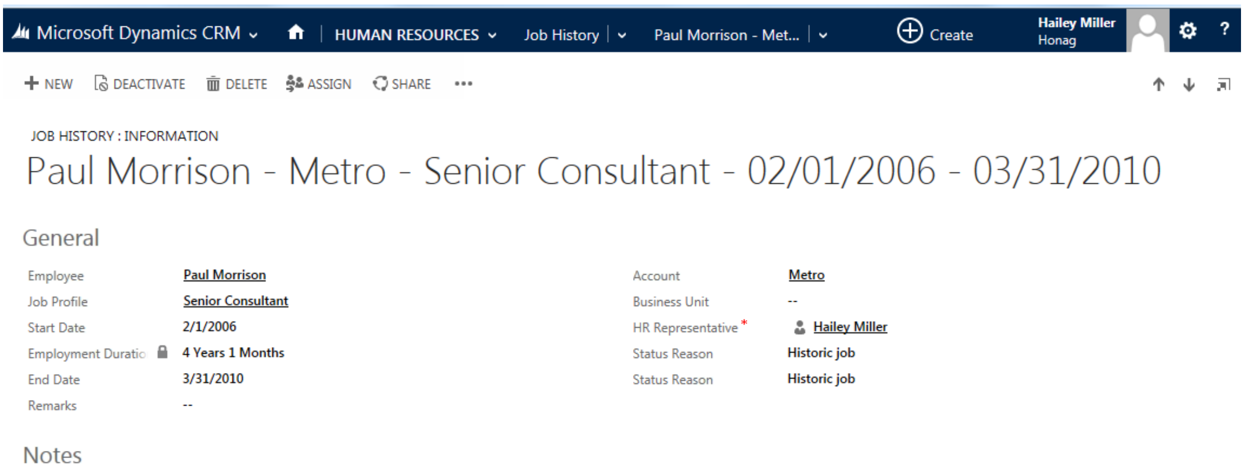
"xRM1 HR Management" supports you by tracking performance review details, target achievements and future steps for improvement.

The educational background of applicants and employees can be listed. Organize employee certifications, including qualification levels and corresponding certificates.

4.3.1 Job History



As default chart, ***"Top 10 Job History Accounts"*** is displayed in the Outlook start screen of this entity. A bar chart shows the accounts where most of the current employees worked before.



"Employee": Select which person the job history belongs to.

"Job Profile": The user can choose the applicable job profile here.

"Start Date": The day the previous job began.

"Employment Duration": The value in this field is calculated automatically. If the record shows an employee's current job, the field shows the difference between the current date and the start date. If the record shows an employee's previous job, the field shows the difference between the end date and the start date.

"End Date": The day the job ended.

"Account": If the job was in another company, select the respective account in this look-up field.

"Business Unit": If the position was internal, for a previous department, select the respective business unit from this look-up field.

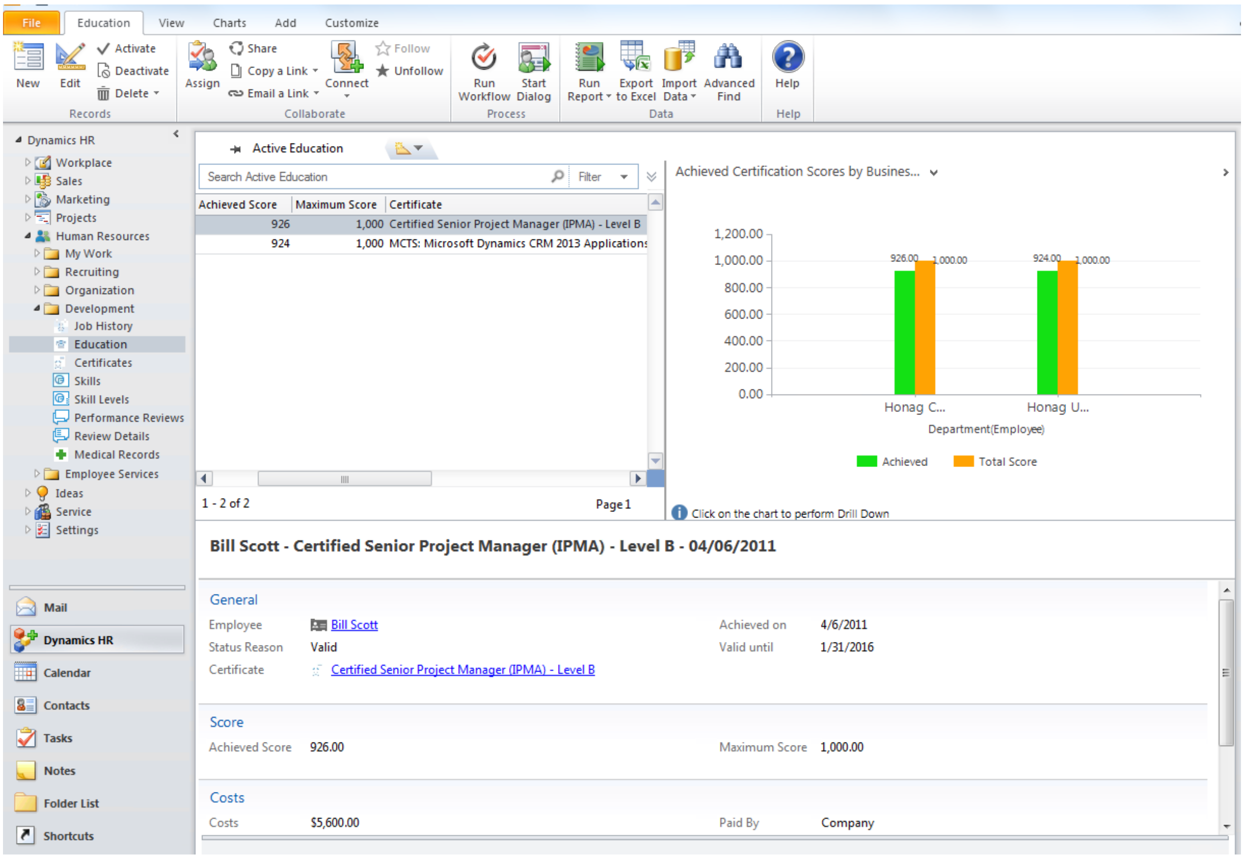
"HR Representative": The HR representative who is also the owner of the record.

"Status Reason": The user can select a status reason for each job history record. Here, he/she can choose between

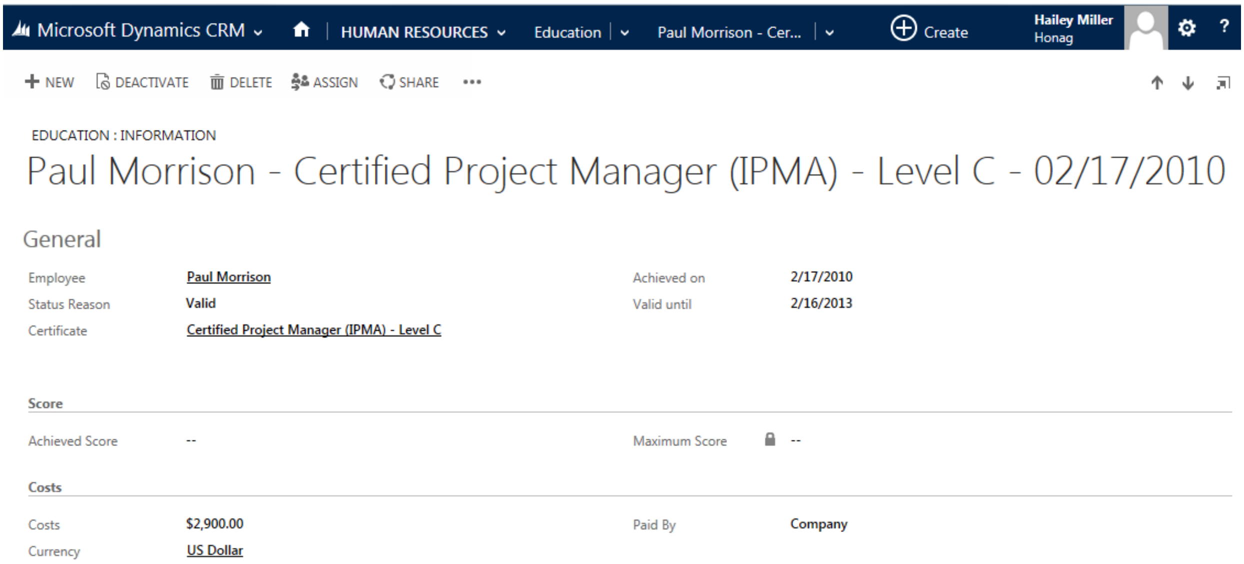
- ***"Historic job"*** and
- ***"Current job".***

"Remarks": Describe the job in more detail or add any additional comments in this field.

4.3.2 Education



As default chart, ***"Achieved Certification Scores by Business Unit"*** is displayed in the Outlook start screen of this entity. A column chart shows per business unit, how many points of how many total points were achieved at in education exams and certificates.



"Employee": Select which person the further education applies to.

"Date of Certification": The day when the employee received the certification.

"Certificate": Select which certificate was received.

"Achieved on": Enter the date when the education was completed successfully.

"Valid until": Enter the date until when the education/certificate is valid.

"Achieved Score": If applicable, the user can enter the employee's certification score.

"Maximum Score": If the certification test included a maximum score, it is shown here. This field is write protected; the maximum score is filed in the ***"Certificate"*** form. Please see chapter 4.3.3 for further details.

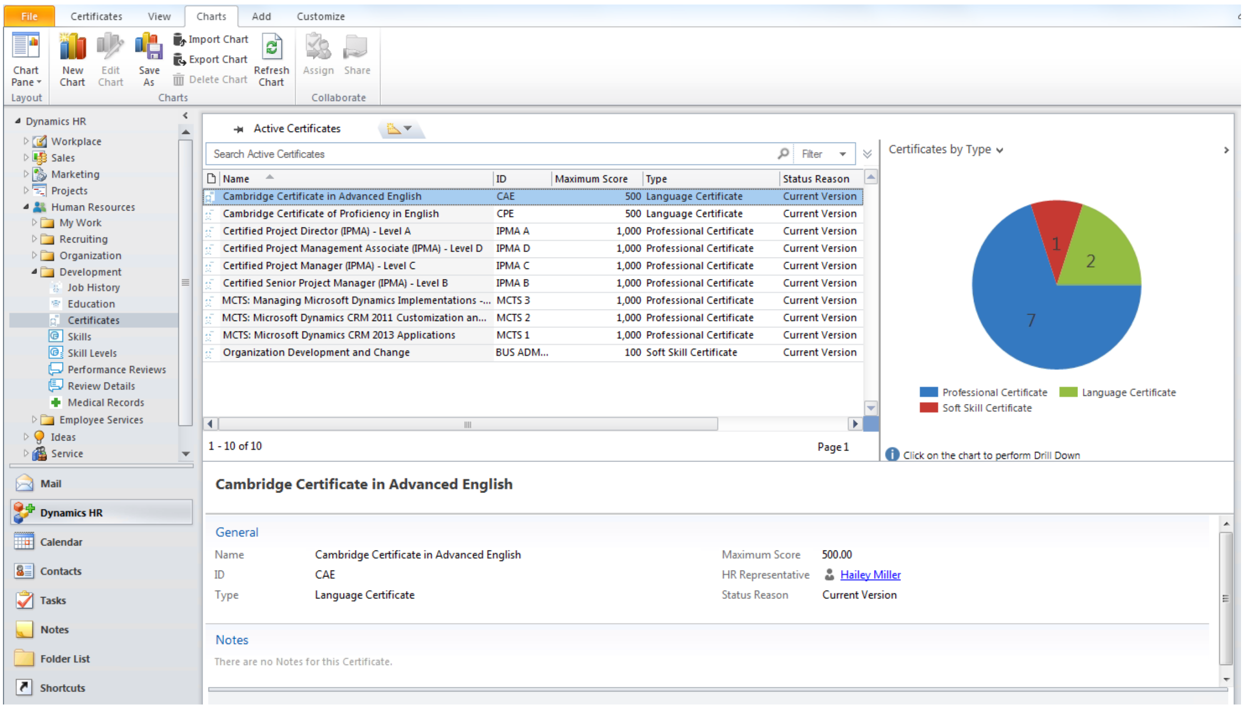
"Costs": Here, the user can enter how much the certification cost.

"Paid by": Select if the payment was covered by:

- ***"Employee"*** or
- ***"Company"***.

"Currency": Select the payment currency used for the certification.

4.3.3 Certificates



As default chart, ***"Certificates by type"*** is displayed in the Outlook start screen of this entity. A pie chart shows how many certificates call a certain type.

"Name": Enter which specific certificate is described.

"ID": If the certificate has an ID number, it can be entered in this field.

"Type": Select between the following certificate types:

- ***"Professional Certificate"***,
- ***"Language Certificate",***
- ***"Soft Skill Certificate"*** or
- ***"Other Certificate"***.

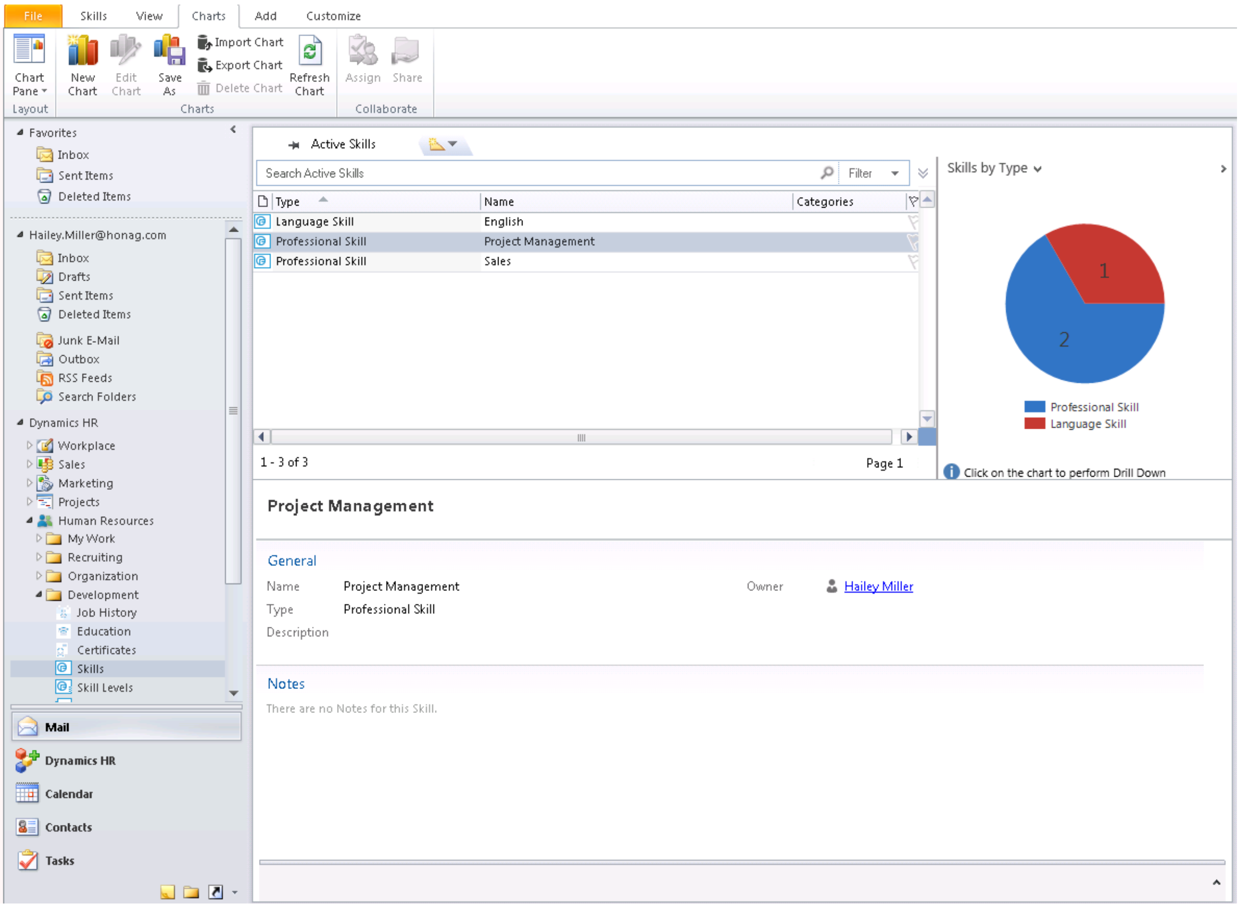
"Maximum Score": If the certification test included a maximum score, the user can enter it here.

"HR Representative": The HR representative is the owner of the record.

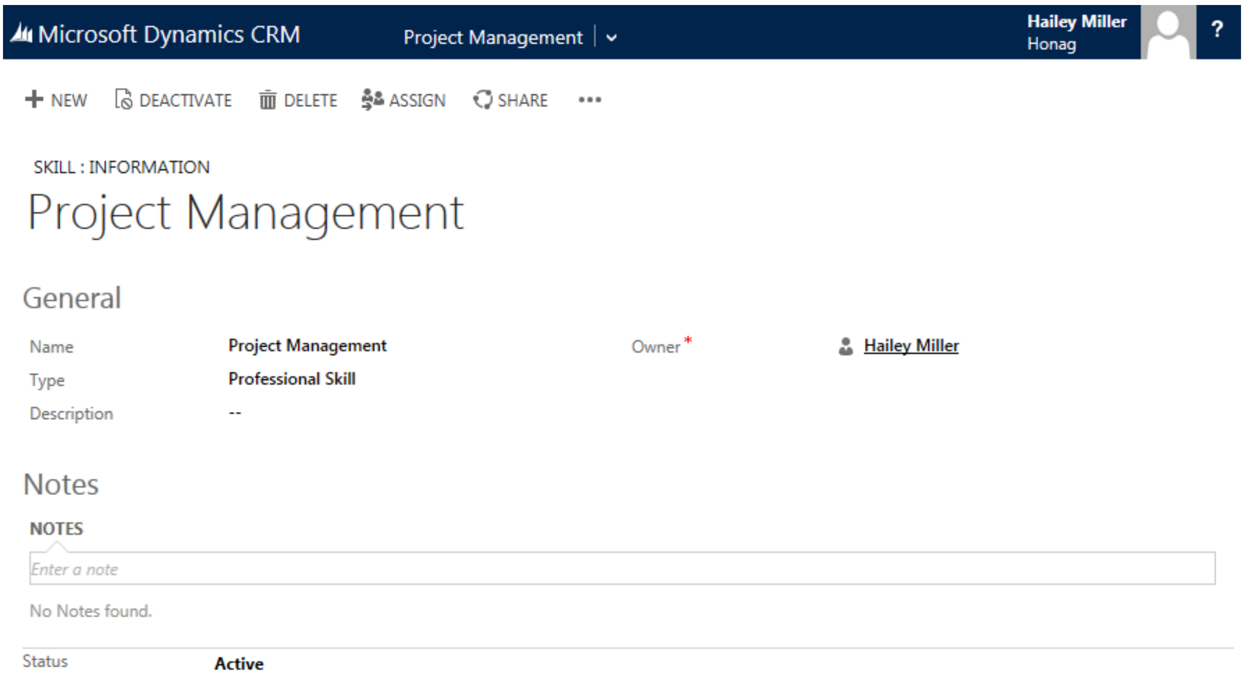
"Status Reason": The user can select a status reason for each certificate. Here, he/she can choose between

- ***"Draft"*** and
- ***"Current Version".***

4.3.4 Skills



As default chart, ***"Skills by type"*** is displayed in the Outlook start screen of this entity. A pie chart shows how many skills call a certain type.



"Name": Name of the skill.

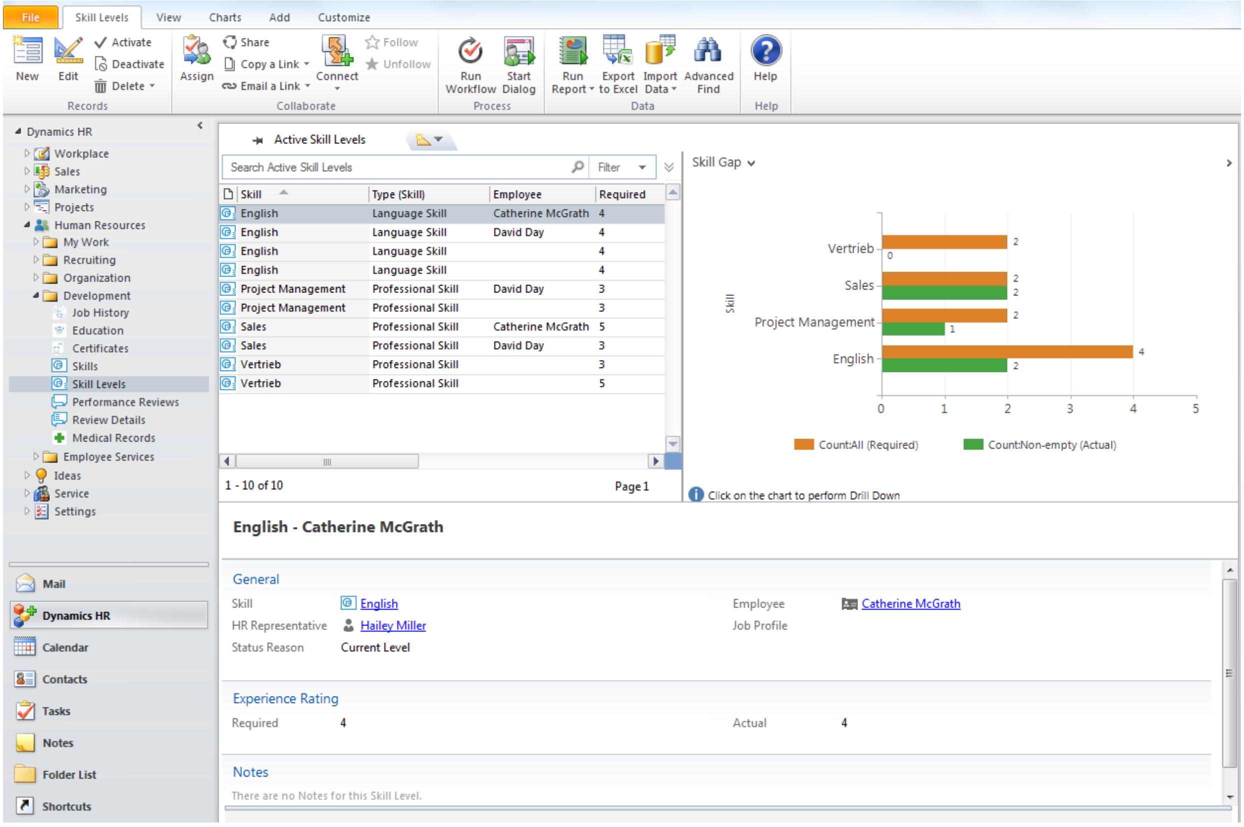
"Type": Select between the following skill types:

- ***"Professional Skill"***,
- ***"Language Skill",***
- ***"Soft Skill"*** or
- ***"Other Skill"***.

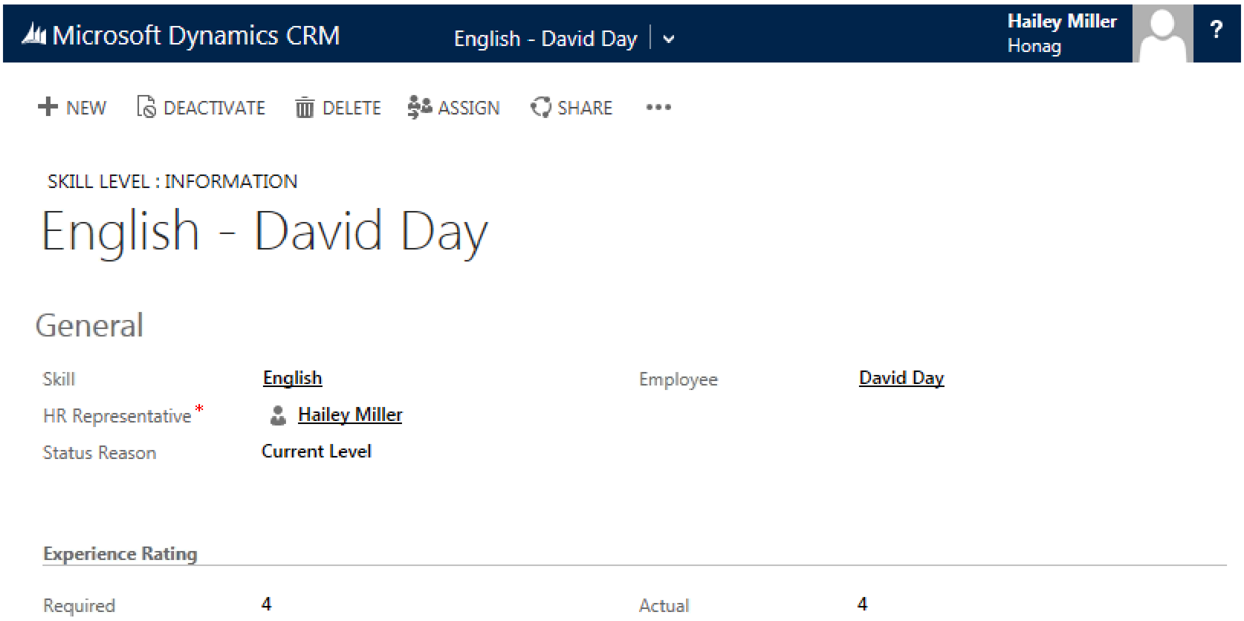
"Description": Enter detailed description of the skill here.

"HR Representative": The HR representative is the owner of the record.

4.3.5 Skill Levels



As default chart, ***"Skill Gap"*** is displayed in the Outlook start screen of this entity. A bar chart shows if values were set for ***"Required"*** and ***"Actual"*** levels of a skill.



"Skill": Select the skill corresponding to this record here.

"Employee": If the skill level is set for an employee, it can be selected here.

"Job Profile": If the skill level is set for a job profile, it can be selected here.

"HR Representative": The HR representative is the owner of the record.

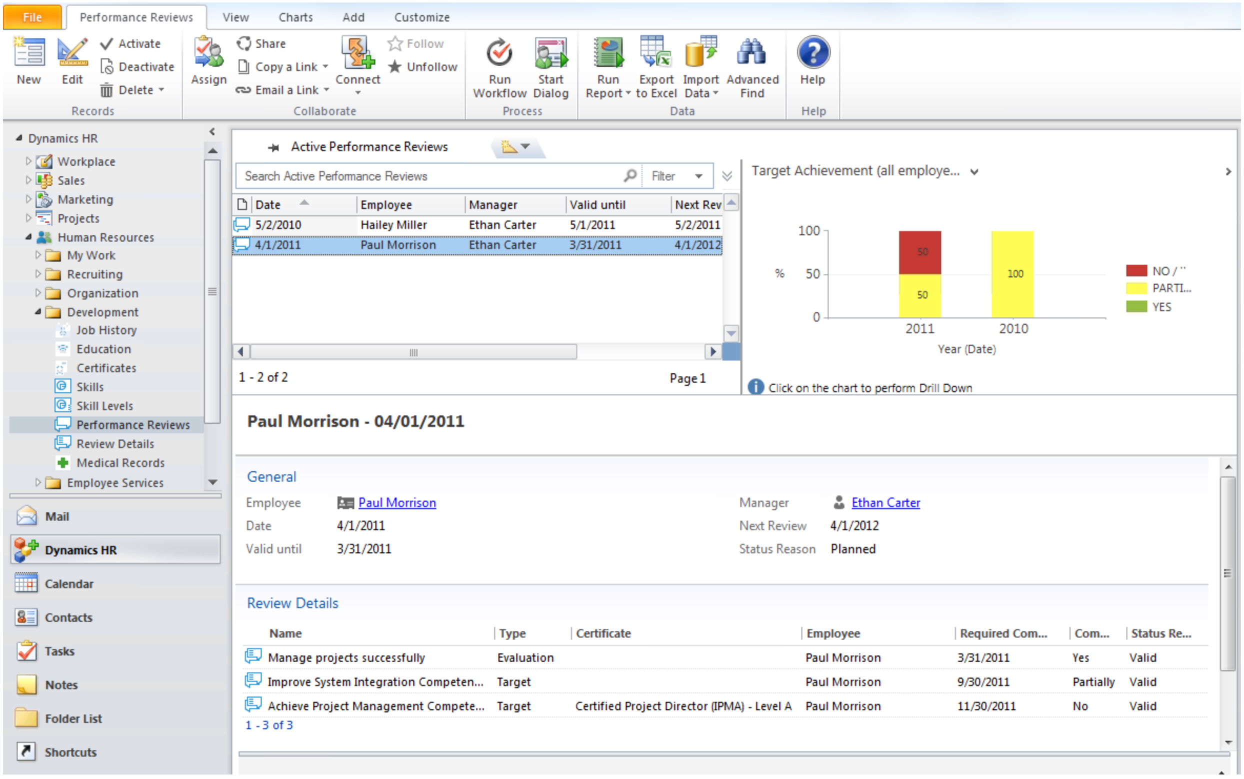
"Status Reason": Select the status reason for each skill level record:

- ***"Current Level",***
- ***"To be evaluated"*** or
- ***"To be confirmed"***.

"Required": Enter a value for the required skill level here. The user has the choice between "0" (worst) and "5" (best).

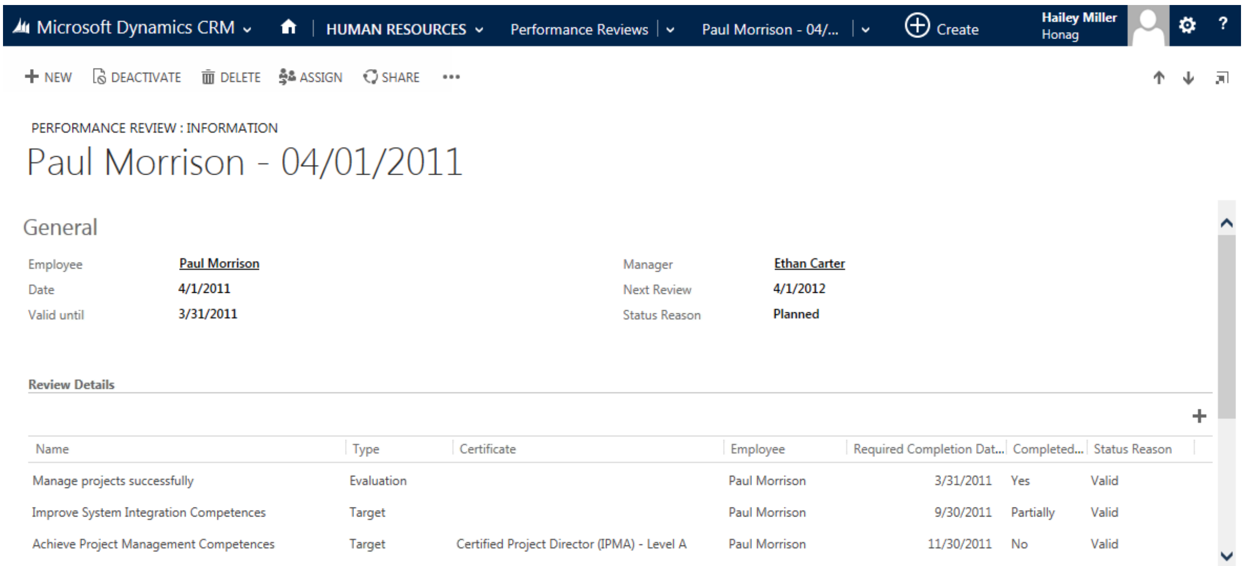
"Actual": Enter a value for the actual skill level here. The user has the choice between "0" (worst) and "5" (best).

4.3.6 Performance Reviews



As default chart, ***"Overdue Performance Review by Business Unit"*** is displayed in the Outlook start screen of this entity. A column chart shows how many performance reviews for employees are overdue, sorted by business unit.

4.3.6.1 Main form



"Employee": Select which person the performance review is for.

"Manager": The manager who conducted the employee review.

"Date": The day when review took place.

"Next Review": The day when the next review is scheduled to take place.

"Valid until": Enter the date until when the performance review is valid.

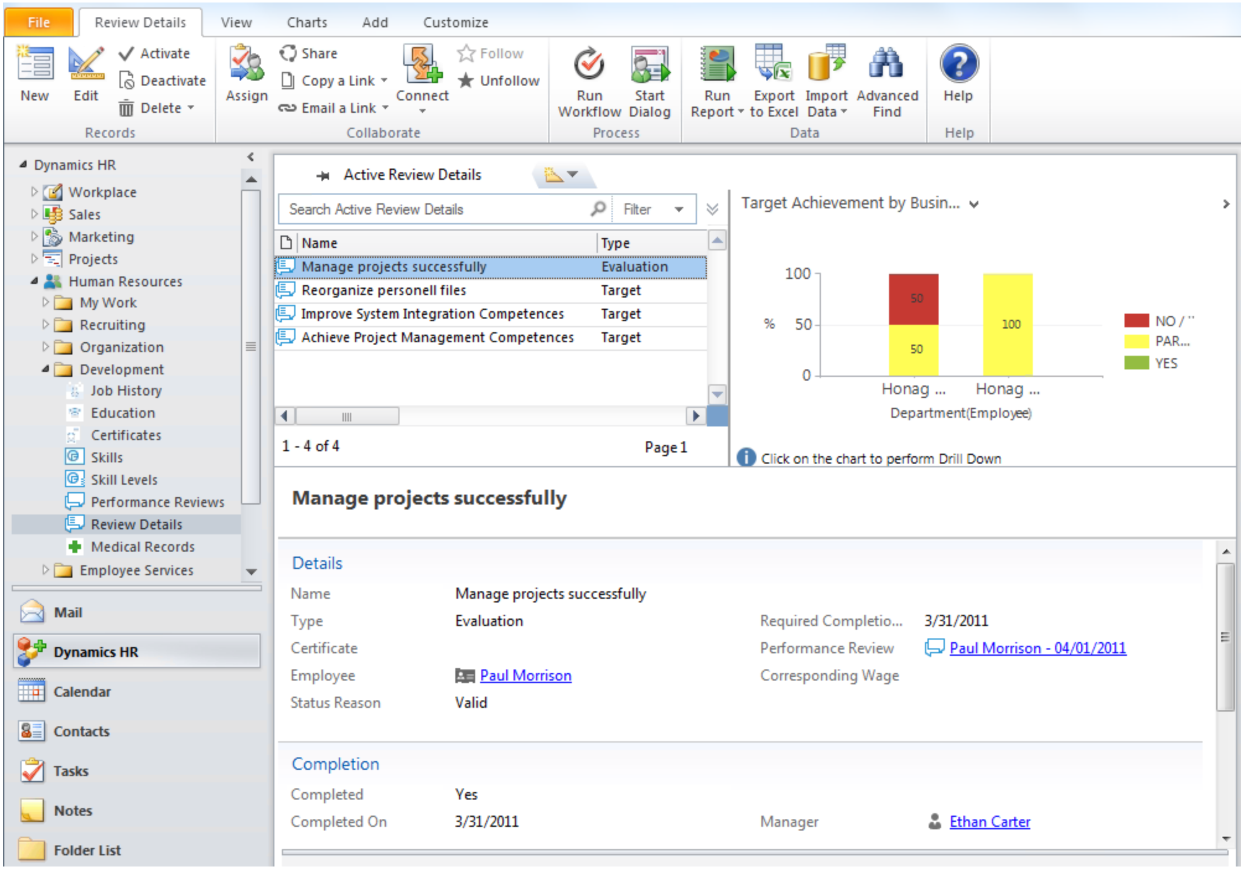
"Status Reason": Select the status reason for each performance review:

- ***"Planned",***
- ***"In Progress"*** or
- ***"Valid"***.

4.3.6.2 Form "Review Detail"

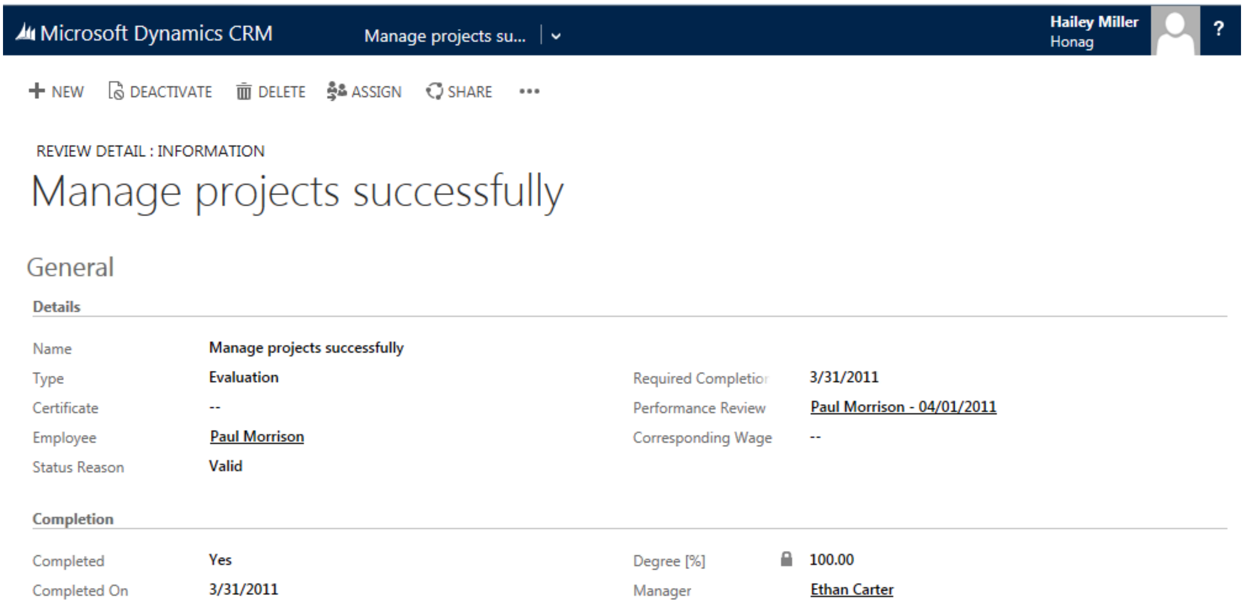
As ***"Review Detail"*** is a separate entity, please see chapter 4.3.7 for details.

4.3.7 Review Details



As default chart, ***"Target Achievement by Business Unit"*** is displayed in the Outlook start screen of this entity. A column chart shows how many percent of the targets of a business unit have been completed (totally or partially) or not.

4.3.7.1 Main form



"Name": Enter here, which specific review detail is described.

"Type": The user can choose from the following review detail types:

- ***"Target"*** or
- ***"Evaluation".***

"Certificate": If the review detail includes some form of certificate, it can be chosen here.

"Employee": Select which person the review detail belongs to.

"Status Reason": Select the status reason for each skill level record:

- ***"Draft"***,
- ***"Agreed"***,
- ***"In Progress"*** or
- ***"Valid"***.

"Required Completion Date": Enter here when the review details is supposed to be completed.

"Performance Review": The performance review which the review detail is connected to can be chosen here.

"Corresponding wage": If the review detail is connected to a certain wage, it can be selected here.

"Completed": The user can select whether or not the review detail was accomplished. They can either select:

- ***"Yes"***,
- ***"Partially"*** or
- ***"No".***

"Degree [%]: If ***"Partially"*** was selected in the ***"Completed"*** field, the user may enter the degree of completion here. If ***"Yes"*** or ***"No"*** was selected, the field is write-protected and automatically filled with ***"0.00"*** (Yes) or ***"100.00"*** (No).

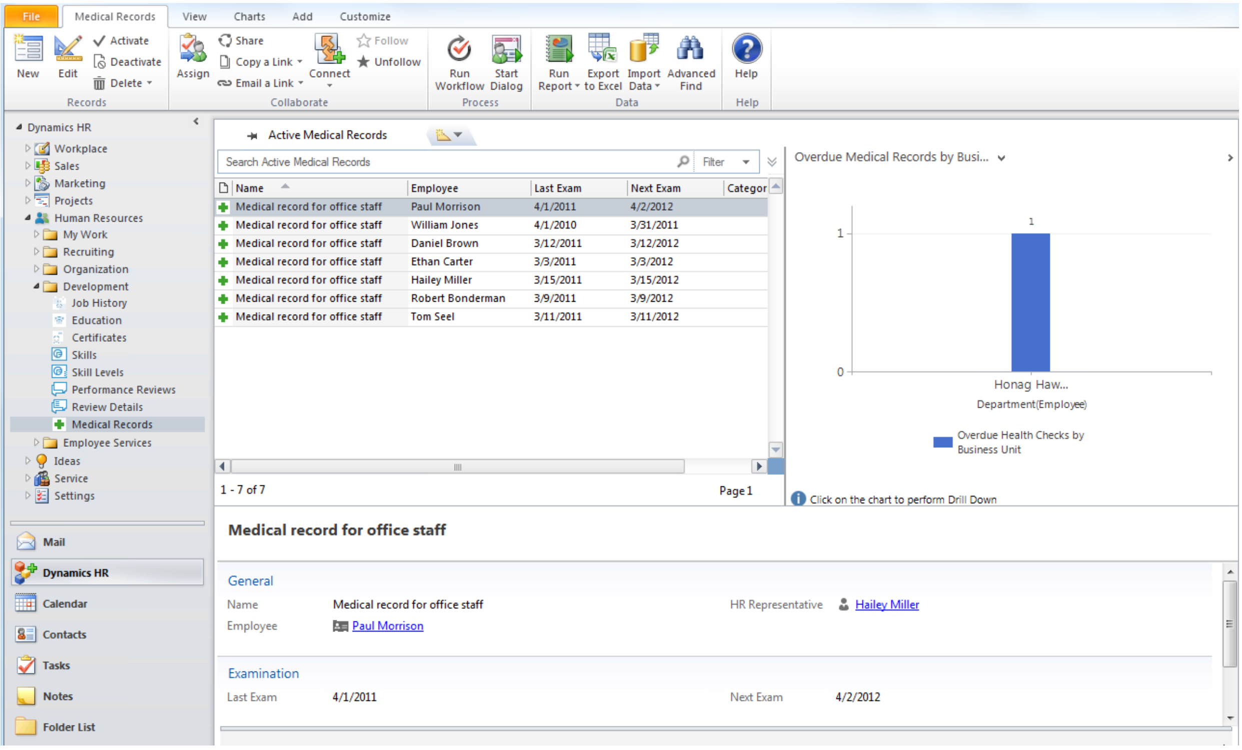
"Completed On": The day when the review detail was completed.

"Manager": The manager who confirms that the review detail was completed.

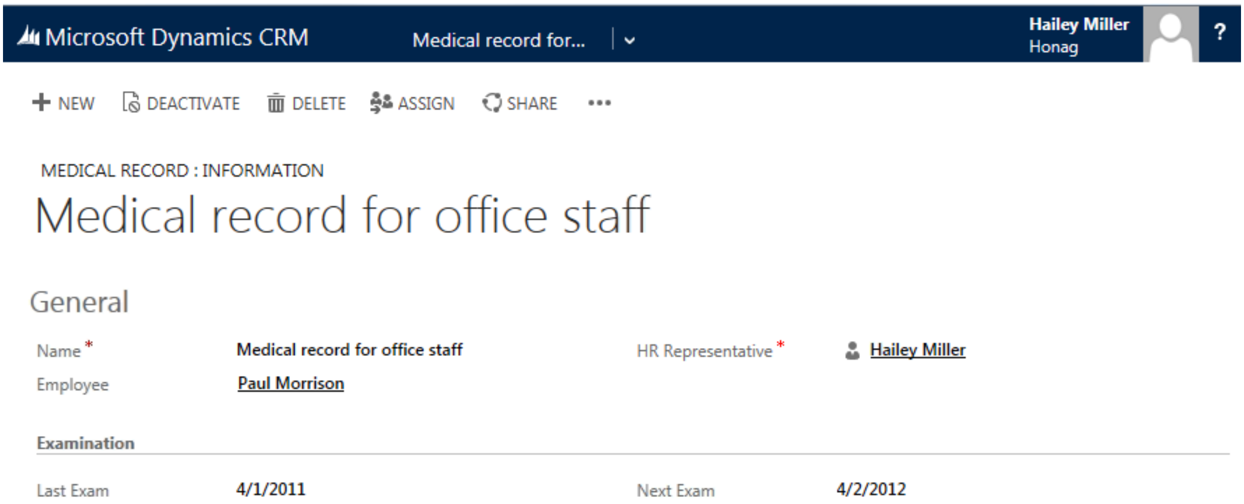
4.3.7.2 Form "Skill Levels"

Please see chapter 4.3.5 for details.

4.3.8 Medical Records



As default chart, ***"Overdue Medical Records by Business Unit"*** is displayed in the Outlook start screen of this entity. A column chart shows how many medical records for employees are overdue, sorted by business unit.



"Name": Enter here, which specific health check is described.

"Employee": Select which person received the health check.

"HR Representative": The HR representative is the owner of the record.

"Last Exam": The day when the last health check took place.

"Next Exam": The day when h the next health check is scheduled to take place.

4.4 Employee Services

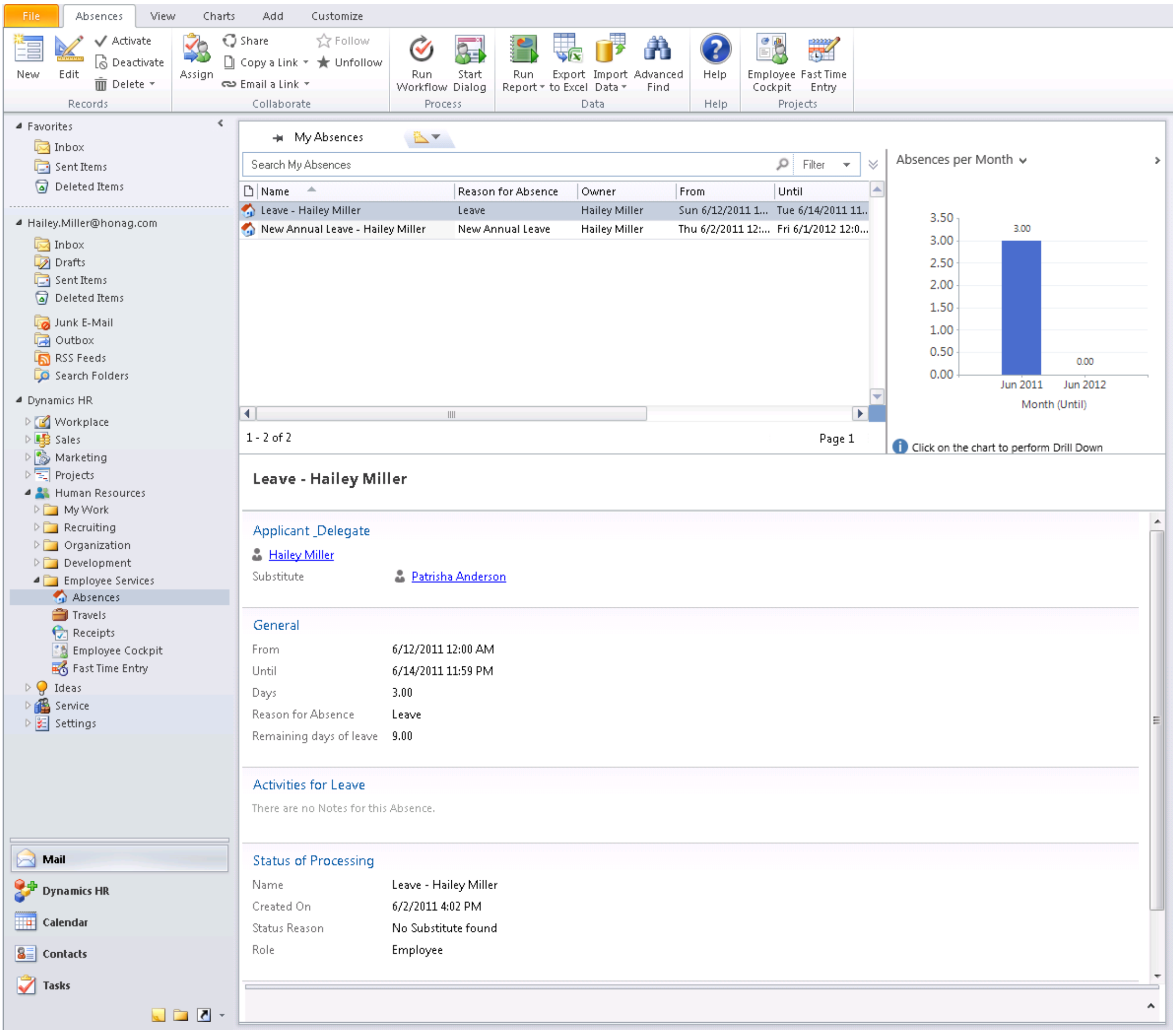
For a more convenient working, we've added the "Employee Cockpit" and the "Fast Time Entry" to the ***"Employee Services"*** section of ***"xRM1 HR Management"***.

This section also makes it easy for you to organize employee absences. Submitted absences will be directly taken into account when availability is being calculated in ***"CRM-Project"***.

"xRM1 HR Management" is fully integrated in Microsoft Dynamics activity management.

Manage employees travel and related expenses. You can submit and track all kinds of expenses; receipts can be added to track individual costs.

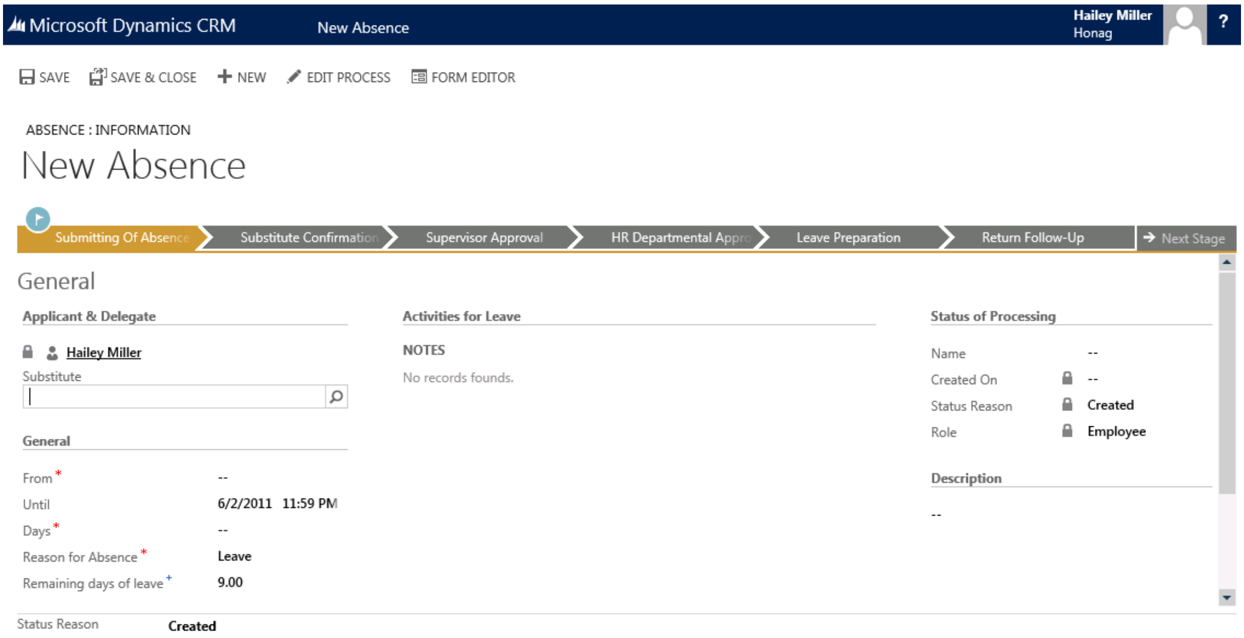
4.4.1 Absences



As default chart, ***"Absences per month"*** is displayed in the Outlook start screen of this entity. A column chart shows how many employees (in terms of days) are/were absent in which month.

4.4.1.1 General description

This menu option provides you direct access to the absence administration of each individual employee. Here you can create requests for leave as well as compensatory time-off.



Requests for leave are used to schedule employee absences. Compensational time-off is credited as "compensation days" to an employee's holiday entitlement. Compensational leave can occur for the following reasons, for example:

- When an employee has cut a vacation short (for work reasons),
- A vacation that has been approved cannot be taken for operational reasons or
- The employee has accumulated a certain amount of overtime which is being given back to them in vacation days.

Requests for leave and compensational time-off are supported through a multi-layer approval process, using Microsoft Dynamics workflows and activities. These workflows can be configured to the rules of your organization, in the Processes area of Microsoft Dynamics settings. In the standard configuration, the following major process steps are included, in particular:

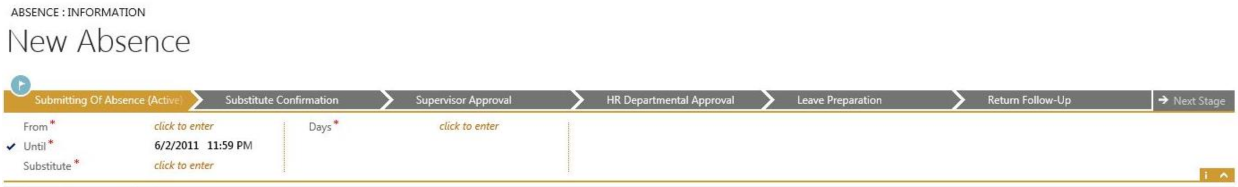
- Substitute selection when creating a request,
- Substitution process whereby the user selected approves/accepts their role as substitute,
- Supervisor (manager) vacation approval,
- HR approval and vacation system entry.

After the vacation substitute has been confirmed, approved by superior/manager and by HR, the vacation days are automatically deducted from the employee's remaining days of leave, or added, in the case of compensational time-off.

Employees responsible for certain roles, such as "Manager" and "Head of HR", are defined in the user settings.

Note: *When you're requesting leave for less than a day, the time away from work must be entered. For example: for a standard 8:00am to 4:00pm (16:00) work day, a half vacation day (in the morning) will be entered as 8:00am to 12:00pm.*

4.4.1.2 Business Process Flow



A default business process flow for absences was created. It includes the following stages and fields:

"Submitting of Absence"

- ***"From"***,
- ***"Until"***,
- ***"Substitute"***,
- ***"Days"*** and
- ***"Reason for Absence".***

"Substitute Confirmation":

- ***"Substitution confirmed".***

"Superior Approval":

- ***"Request approved".***

"HR Departmental Approval":

- ***"Request approved".***

"Leave Preparation":

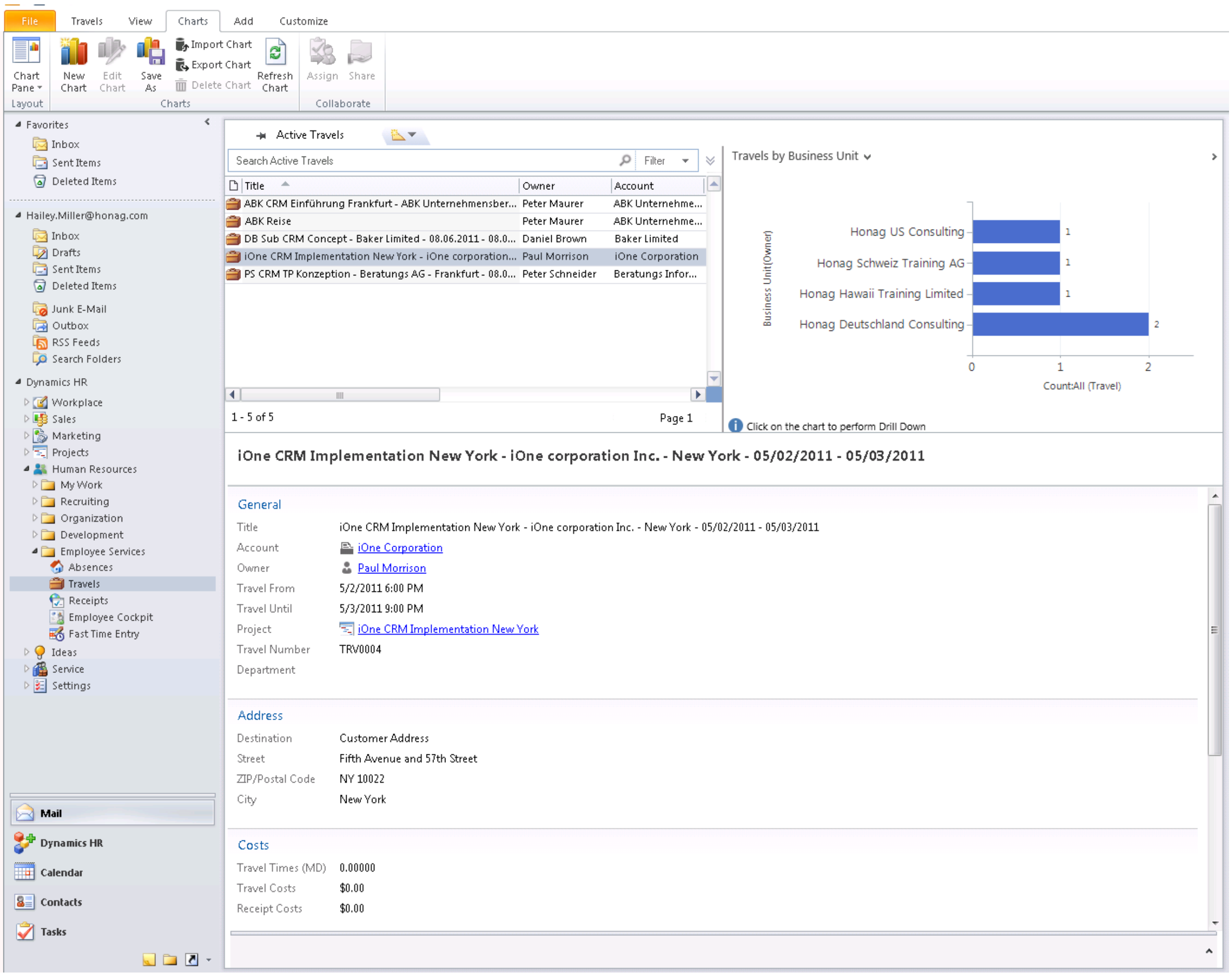
- ***"Preparation completed".***

"Return Follow-up":

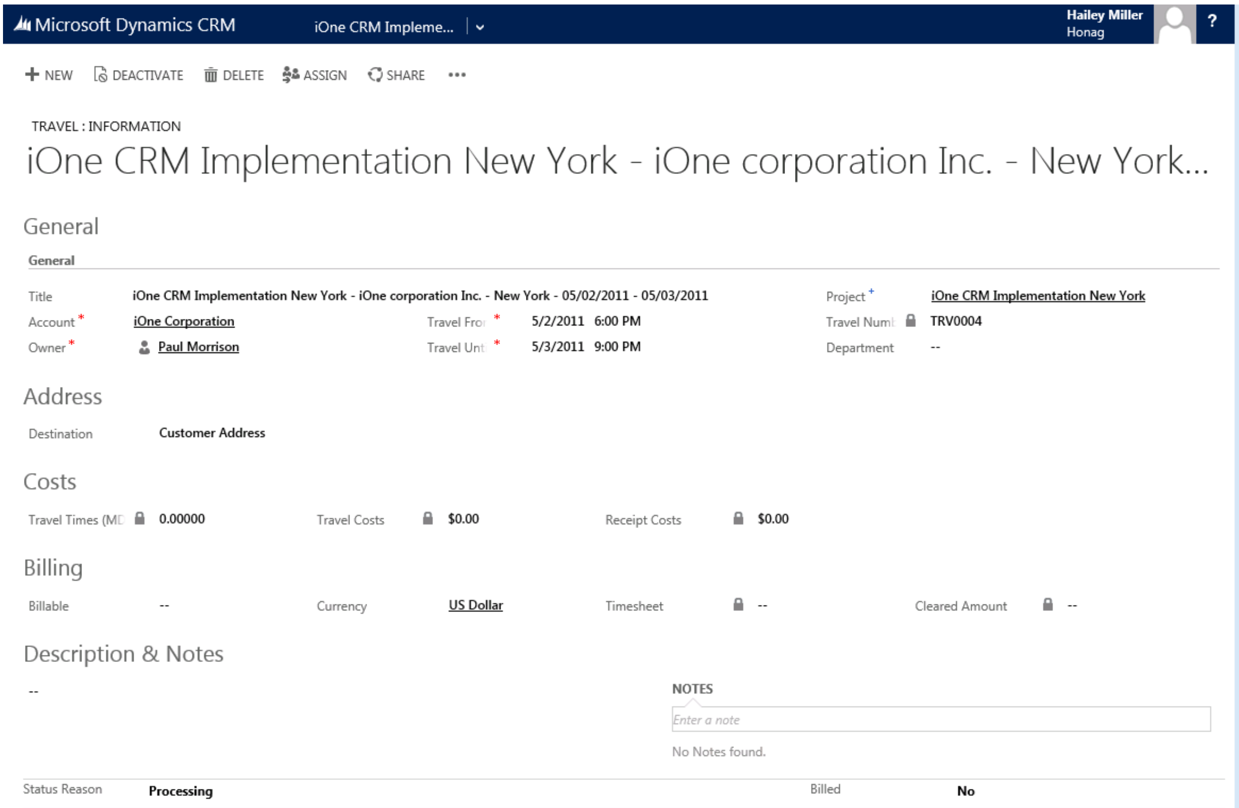
- ***"Follow-up completed".***

Note: *Fields can be added specifically just to the process flow. In addition, they can be on the form as well as on the process flow. If this is the case, entering or changing data in a field will apply for the form and the process flow.*

4.4.2 Travels



As default chart, ***"Travels by Business Unit"*** is displayed in the Outlook start screen of this entity. A bar chart shows the amount of travels, sorted by business unit.



New travel can be created within the Microsoft Dynamics menu or within a project node. When creating a travel within a project node, the ***"Project"*** field is automatically prefilled by the system.

- The ***"Title"*** is automatically filled in and contains the project name, destination and travel period.
- ***"Owner"*** is the employee taking the business trip. This is filled in with the current user.
- The ***"Account"*** field specifies which customer will be visited on the trip and is automatically filled in with the account from the respective project.
- ***"Department"*** is available if more detail is needed.
- The ***"Travel Number"*** is used as a unique identifier for the trip and associated receipts.
- ***"Project"*** shows the relevant project.
- ***"Travel From"*** and ***"Travel Until"*** is used to specify the time period of the entire trip.
- ***"Primary customer address"*** or ***"Different address"*** specifies whether the destination is the customer address or a different address (such as a construction site or a regional office). When a different address is needed, additional fields are displayed to specify ***"Street"***, ***"ZIP code"***, ***"Town/City"*** and ***"Additional address"***.

The fields in the ***"Costs"*** area are automatically filled in by the system, as soon as receipts or times are entered for the trip.

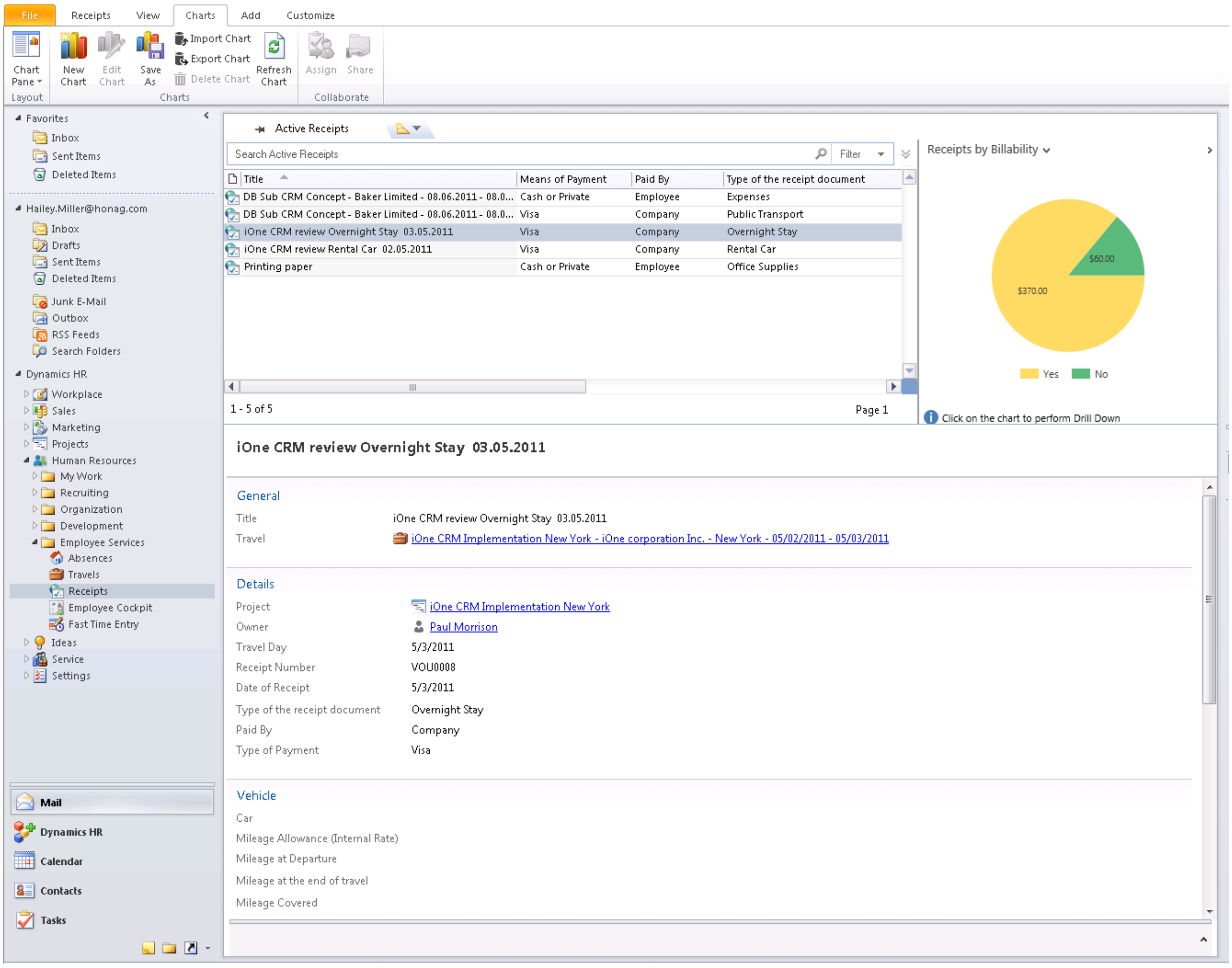
The tab on the left-hand side of the travel screen (as in the project) allows the user to create activities as well as view all completed activities. The activities stored here, are seen as 'travel times', as they are assigned to a trip. Therefore, the specific arrival and departure of an appointment should be assigned to the trip and not to the project.

Conversely, specific service appointments related to a project should not be associated with the trip but with the relevant project (e.g. ***"Appointment"*** or ***"Service Activity"***). When creating these activities, use the ***"Associated Travel"*** field (under the Travel Management tab) to specify the travel associated with the appointment. The ***"Regarding Appointment"*** and ***"Regarding Service Activity"*** menu options allow you to view travel appointments and service activities. Solution settings can be used to plan travel activities (arrival, departure, preparations, and bookings, etc.) as well as times and costs. You can decide if travel times and expenses are tallied just for the trip, or are passed on to the project.

Receipts are totaled in the trip in the ***"Costs"*** field, as soon as the receipt is closed. These costs are always passed on to the costs of the project.

***Note**: Functionalities marked with an * are only available in combination with **"CRM-Project"** or an **"xRM1 HR Manager"** License.*

4.4.3 Receipts

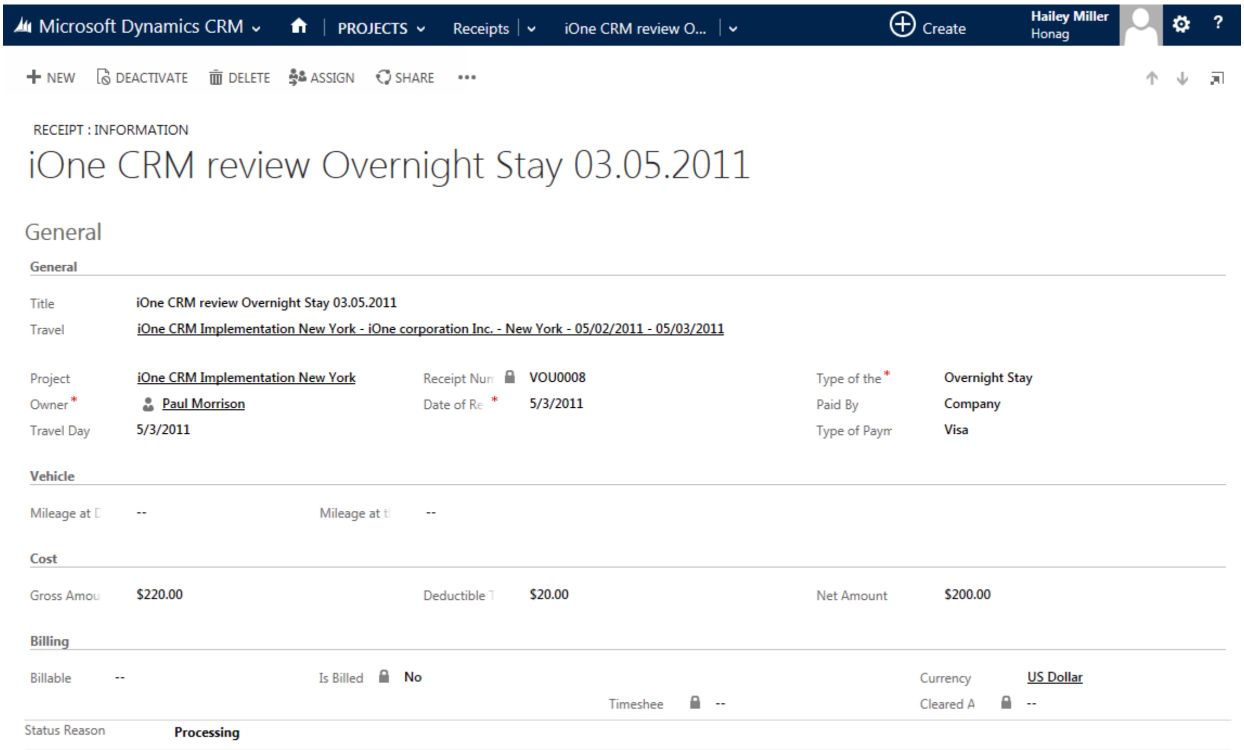


As default chart, ***"Receipts by billability"*** is displayed in the Outlook start screen of this entity. A pie chart shows the total value of receipts, sorted by billability.

In the standard, receipts are always associated with travel. However, you can also create receipts without travel. There are various receipt types within the **Type of receipt document** field to choose from:

- Entertainment expenses
- Office supplies
- Bus/train
- Company car
- Flight
- Gifts
- Fuel
- Rental car
- Parking fees
- Private
- Other receipt document types
- Private vehicle
- Other car expenses
- Expenses
- Taxi
- Telephone
- Overnight stay

Various fields for entering receipt information are displayed at different times depending on the receipt type. Relevant net costs are used for travel/project costs. For the ***"Company Car"*** receipt type, standard system costs are taken from the resource (e.g. Car) once the travel distance has been entered.



To create a new receipt, simply follow the steps below:

- A receipt for a particular trip is assigned with the ***"Travel"*** field. When creating a travel receipt, the value is automatically taken from the trip. This also applies to the ***"Project"*** field.
- ***"Type of receipt document"*** provides you with a variety of field options. For example, selecting ***"Company Car"*** hides the ***"Costs"*** field from view; fields for selecting a vehicle and specifying the miles driven are displayed. Selecting ***"Expenses"*** reveals a tab which is linked to an (internet) expenses calculator.
- ***"Receipt number"*** is filled in automatically.
- Select ***"Type of payment"*** (not available for every receipt).
- Select ***"Method of payment"*** (not available for every receipt).
- Select ***"Travel day"***.
- Select ***"Receipt day"***.
- Select ***"Gross Amount"***.
- Select ***"Deductible taxes"***.
- ***"Net Amount"*** is calculated automatically.
- Select ***"Vehicle"*** if receipt type ***"Company Car"*** is selected.
- For receipt type ***"Company Car"***: The mileage is calculated automatically from the travel beginning and end. The calculated value can be overwritten.
- The ***"Description"*** field allows you to add additional information, for any further clarification.
- The ***"Expenses calculator"*** tab is only available when ***"Expenses"*** is selected as the receipt type.

Receipts are bound to the travel once deactivated.

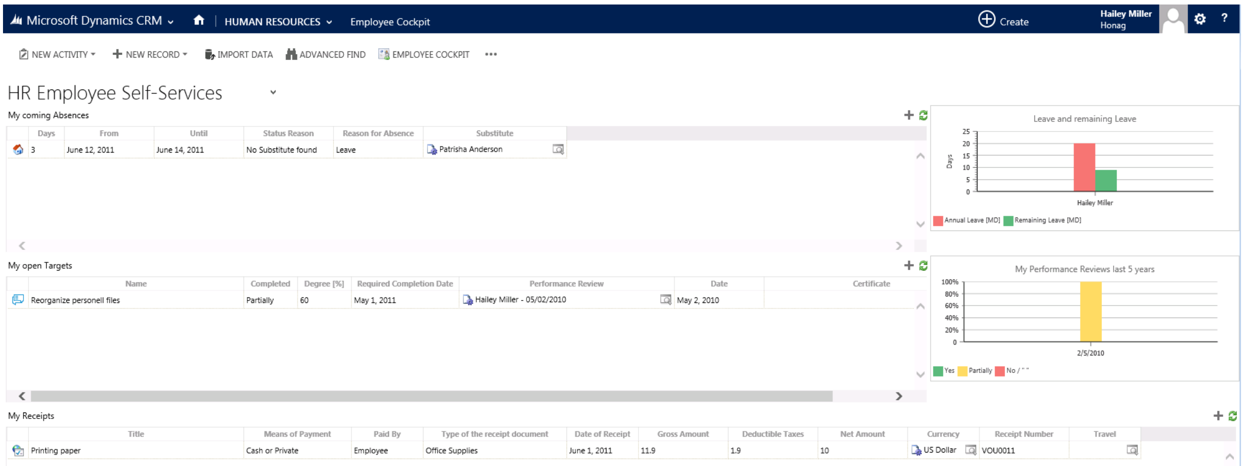
Note: *For most receipts, the Net Amount field is used as the starting field for calculating cost. However, the company car is an exception. Costs for the company car are taken from* ***"Costs per unit"*** *in the facility/equipment selected and multiplied by the value in the* ***"Distance traveled"*** field.

Tip: *Alternatively, receipts can also be entered centrally (e.g. by the back office). To do this, display the receipts at the required places within the pane. This enables those responsible to enter all receipts, and to directly assign those employees in question, such as for further classification or assignment to travel or a project.*

4.4.4 Employee Cockpit

For the time entry functionalities of the Employee Cockpit, please see chapter 5.2.

Besides these time entry functionalities, the Employee Cockpit offers several views and charts for employees to get an overview about their performance reviews and targets, absences and personal receipts. In order to use them, please use the view ***"Employee Self-Services"*** in the dropdown section.



"My coming Absences": Overview of the employee's coming leaves.

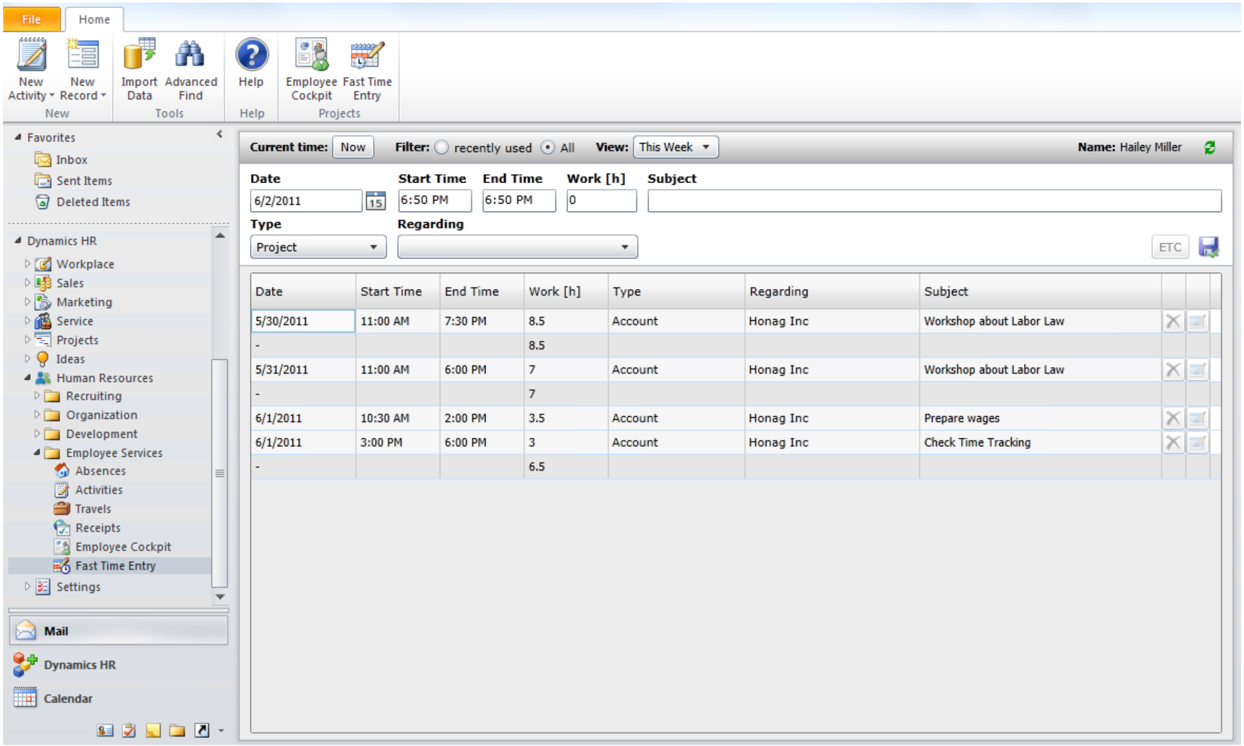
"Leave vs. Remaining Leave": This column chart compares the annual to the remaining leave entitlement.

"My open Targets": Overview of the employee's open targets which were agreed in performance reviews.

"My Performance Reviews last 5 years": This column chart shows how many percent of the employee's targets have been completed (totally or partially) or not in the last five years.

"My Receipts": Overview of the employee's personal receipts.

4.4.5 Fast Time Entry



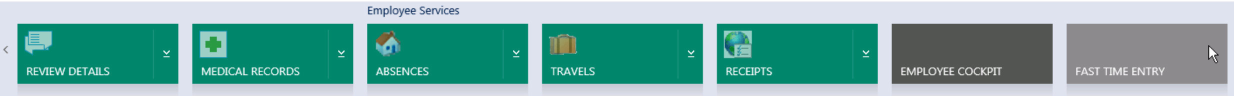
Please see chapter 5.1 for details.

5 Time entry functionalities

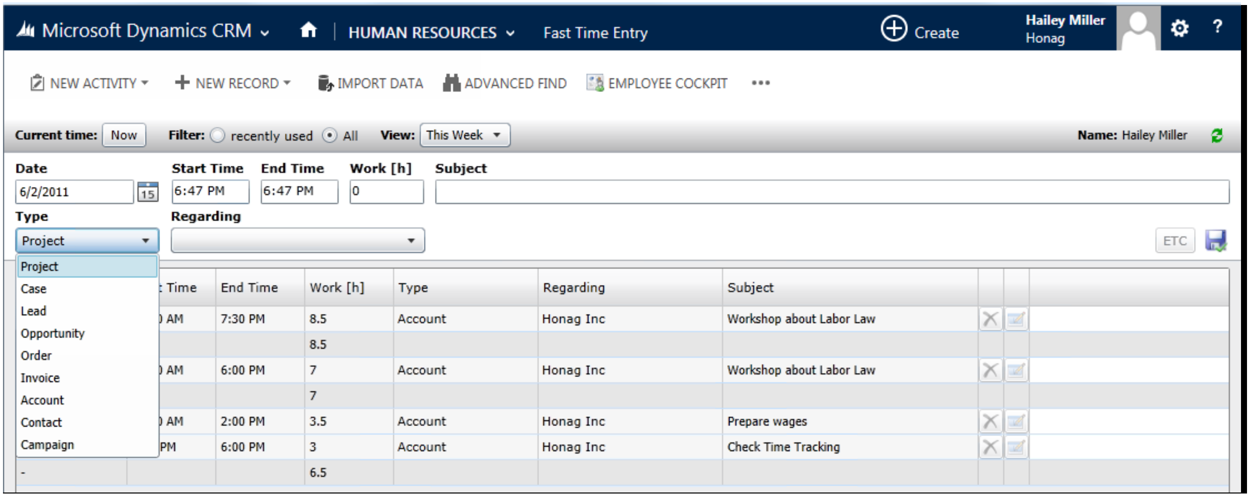
The following functionalities can be found in the ribbon bar. In terms of content, they belong to the ***"Employee Services"*** section.

5.1 Fast Time Entry

The ***"Fast Time Entry"*** mask helps to make employee time entry even easier. The fast time entry mask is located on the ribbon bar, in almost every Microsoft Dynamics screen. The time entry mask can be made available as a direct link, for those users who don't have a Microsoft Dynamics license (e.g. ***"ESS CAL"*** user).



The mask allows you to edit completed work in one screen; you can add start/end times, assign work to other entities (projects, cases, leads, orders, etc.) or add activity descriptions. Once you are finished, you can then add he next activity.



The top menu of the Fast Time Entry is used for creating new entries.

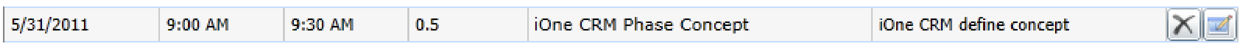
- ***"Current time"***: Sets all dates and time values to the current time.
- ***"Filter"***: Select whether or not recently used entities or all entities are listed in the project list.
- ***"View"***: Filter which displays entries for the selected time period: Yesterday, today, this week or last week.
- ***"Name"***: Displays the user currently logged on. This user will also be designated for creating any appointments.
- ***"Date"***: Date entered.
- ***"Start time"***: Start of the entry.
- ***"End time"***: End of the entry (changes automatically if the work duration changes).
- ***"Work [h]"***: The work time of the entry (is automatically filled with start and end time).
- ***"Subject"***: The description of the time entry.
- ***"Type"***: List of entities available for time entries.
- ***"Regarding"***: List of the records available for employee entries, for selected entity types.
- ***"ETC"***: Estimated Time of Completion: Here you can register any work that still needs to be completed.
- ***"Save"***: Saves the activity as complete.

All time entry mask entries are (as a default) stored as appointments in Microsoft Dynamics and therefore, are also available in the Outlook calendar.

However, the Fast Time Entry *records* are synchronized systematically. This allows you to configure Outlook filters specific for Fast Time Entry records, thus preventing the time recording entries appearing in Outlook.

Entries are grouped per day. The work volume total is displayed every day, to help you control which employee entries have been completed and which not..

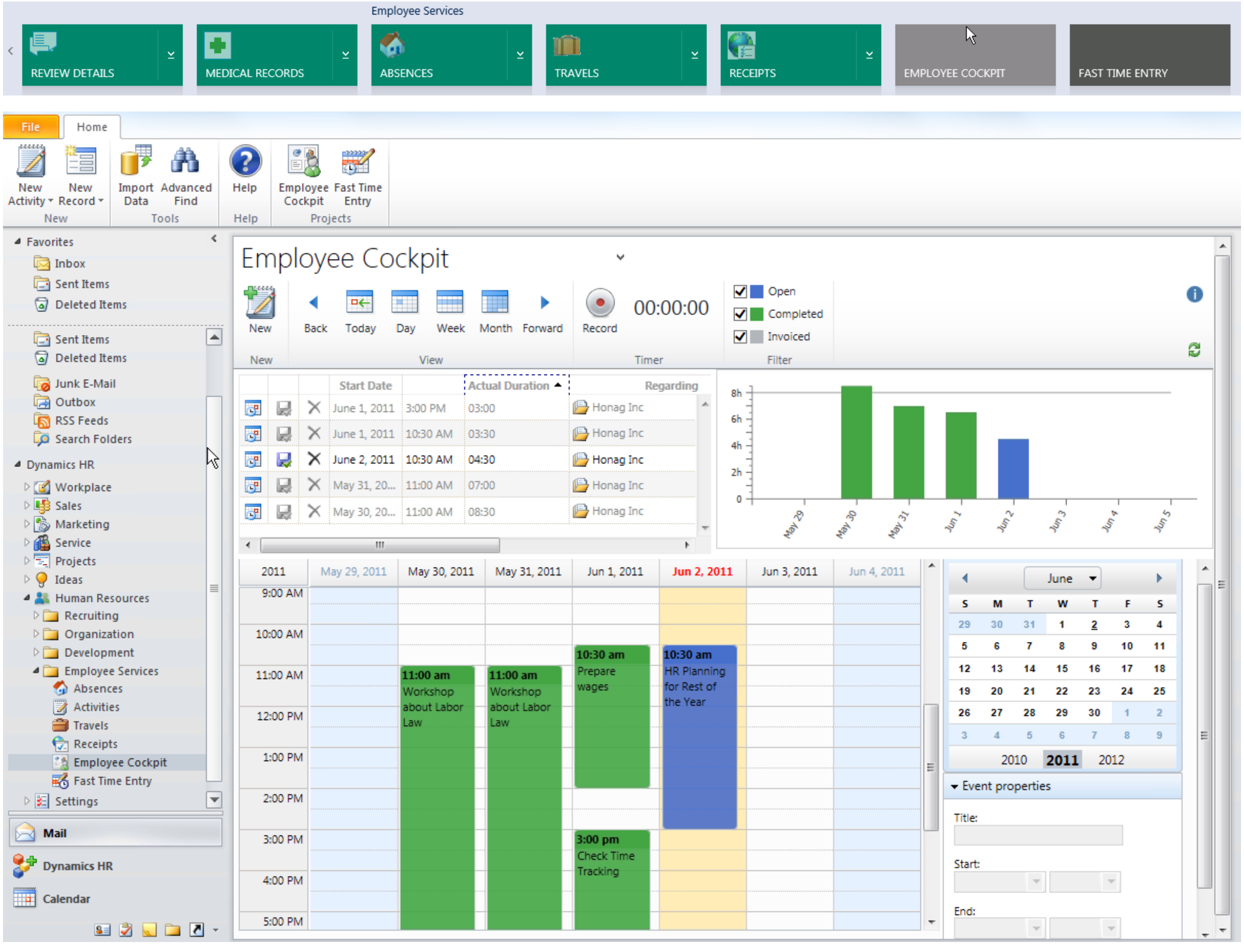
Listed activities can be subtracted or edited by the user.



However, changes will no longer be possible for already settled entries.

5.2 Entering Time with the Employee Cockpit mask

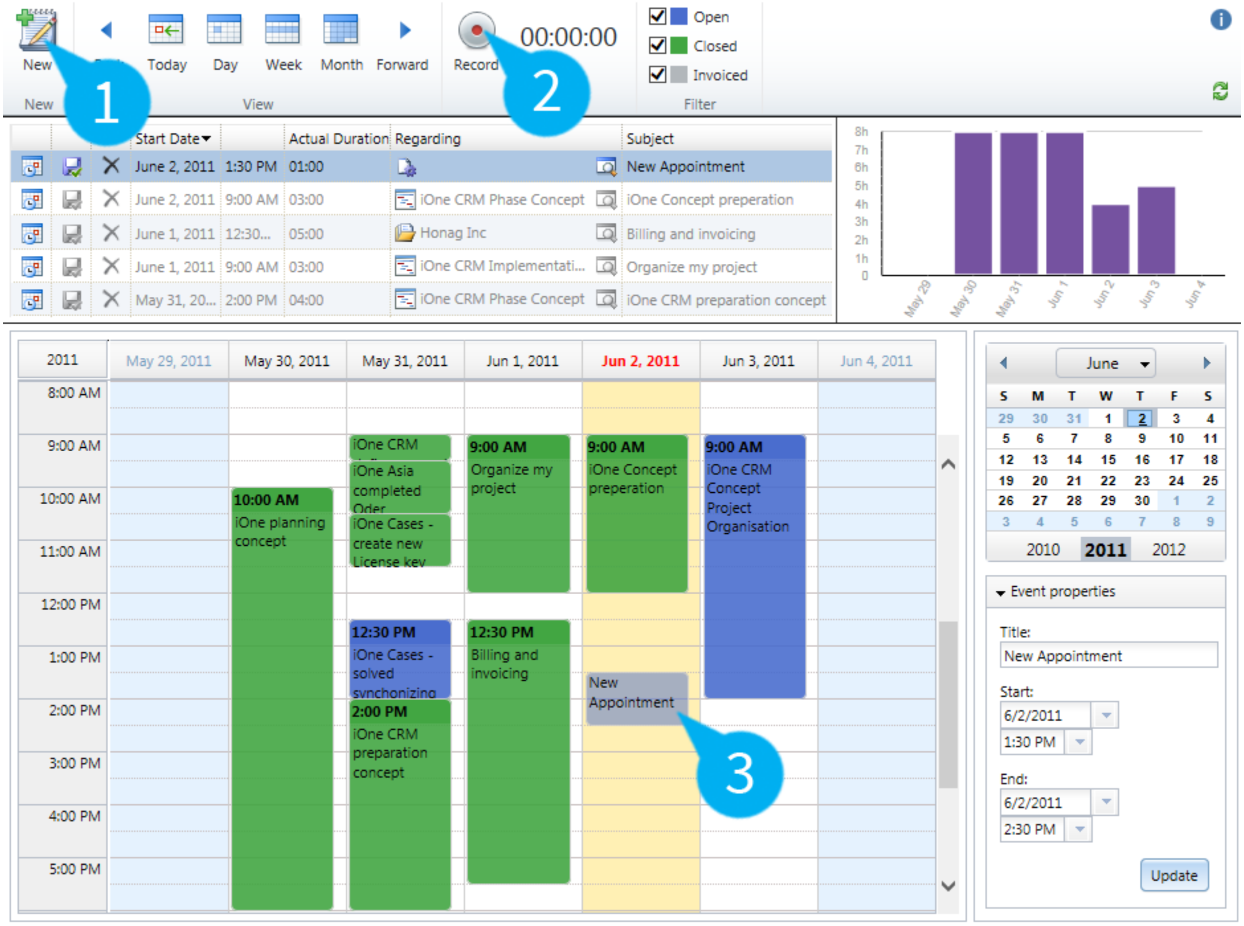
With the user friendly and flexible Employee Cockpit mask, you can enter and edit your work hours quickly and easily. It can be accessed in almost all areas of Microsoft Dynamics, from the menu bar. The Employee Cockpit mask can also be used from outside Microsoft Dynamics (integrated into your intranet page, Outlook start page, SharePoint site etc.)



Please select the ***"Employee Cockpit"*** view in the dropdown area after starting the mask. After that, you can create and edit the time entries in three different ways:

1. Using the "New" button at the top
2. With a stopwatch
3. In the calendar view

The entered items will be immediately synchronized with the Microsoft Dynamics system and can be used for project reporting and controlling.



5.2.1 Time Entry with the "New" button

To create a new entry, click on the ***"New"*** button, located on the left hand side of the menu (1). A new time entry line will be created in the grid; the item also appears in the calendar view (3). Now, you are able to edit the start/end time and/or duration, create a new title, and (if necessary) add a short description. You can use the look-up button to select the ***"Regarding"*** item. After selecting the button, you can search for the appropriate 'regarding record' via the Microsoft Dynamics look-up mask.

To complete your time entry, click on the diskette icon in the second column of the grid. The time is now recorded and the line will be greyed out.

To view an item in Microsoft Dynamics, use the calendar icon in the first column.

To delete a record, click on the ***"Delete"*** icon in the third column.

5.2.2 Time Entry with the stopwatch

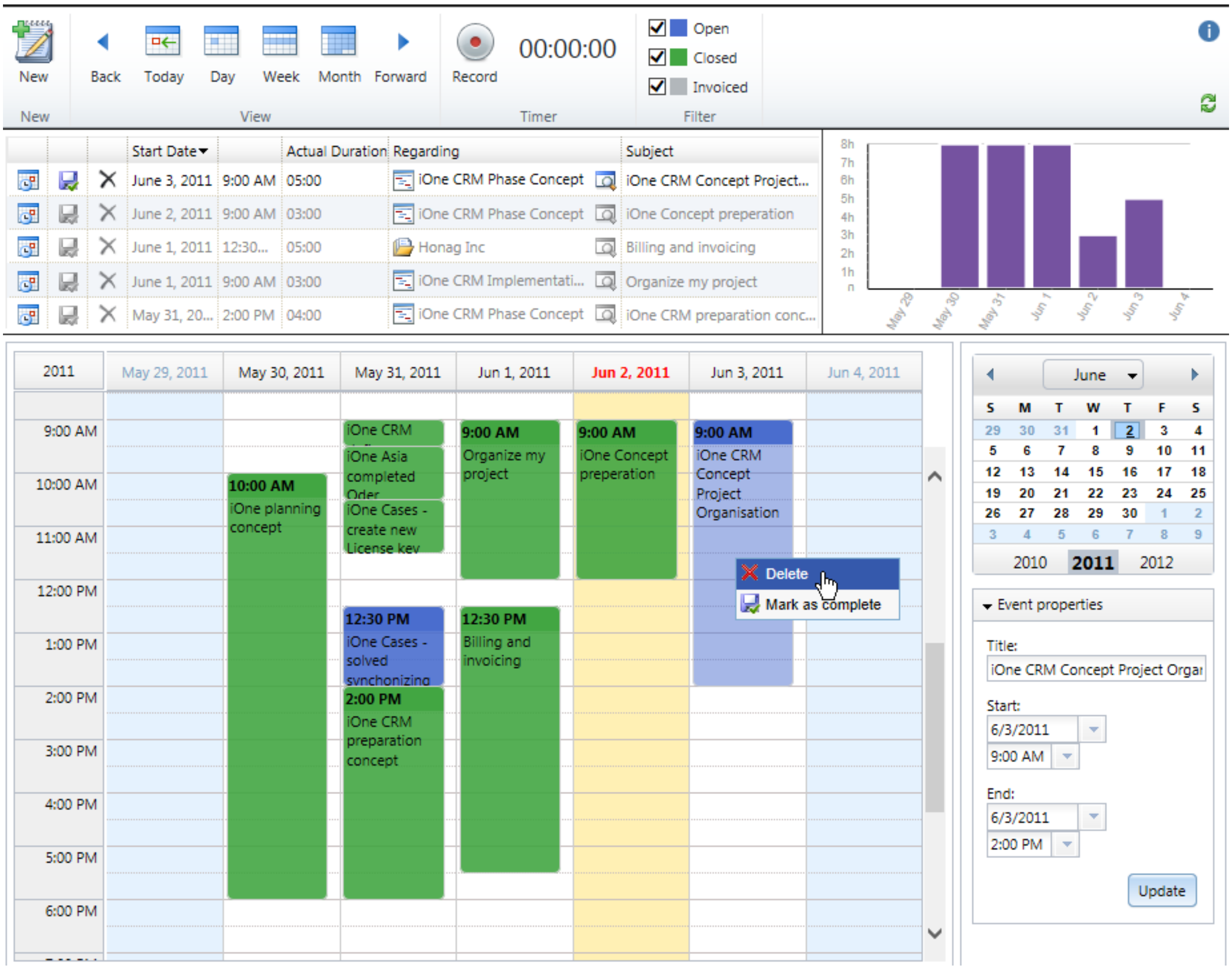
To track your current tasks, use the stopwatch or "Timer" in the upper menu (2).

To create a new entry, click on "Record": the new item, and appropriate blue colored item, will be created in the grid. As with other time entries, you need to fill out the information related to the record. You can enter the information now or after you've stopped the timer. For recording, editing, or deleting the entry, use the options previously described.

5.2.3 Time Entry with the calendar view

To create a new entry in the calendar view (3), click once directly in the calendar: the new blue colored item will be created. Now you can edit the start/end time and/or duration by dragging and dropping the upper and lower boundaries of the item or moving them. Create a new title using the ***"Event properties"*** mask, on the right. To select the 'regarding' item, or for entering more details, you can use the grid view or open the record in Microsoft Dynamics by double clicking on the item in the calendar.

To complete your time entry, right-click on the created item and choose the ***"Mark as completed"*** option. The time is now recorded and the item color will change from blue to green. Choose the ***"Delete"*** option to delete the entry.



5.2.4 Graphical hours overview

A container displaying the hourly overview is available: a column chart shows the total number of hours entered for each day.

5.2.5 Navigation, views and filters

In the top bar, you will also find navigation and filtering functionalities. You can set and navigate between today, daily, weekly and monthly views, forwards and back. The filter for "open", "closed", and "invoiced" entries provides you with a more transparent and flexible view for creating and viewing your entries.

You can also use the calendar, on the right hand side, to navigate to a particular day.

5.2.6 Employee Cockpit Mask modification

The Employee Cockpit mask can be adjusted according to your individual needs:

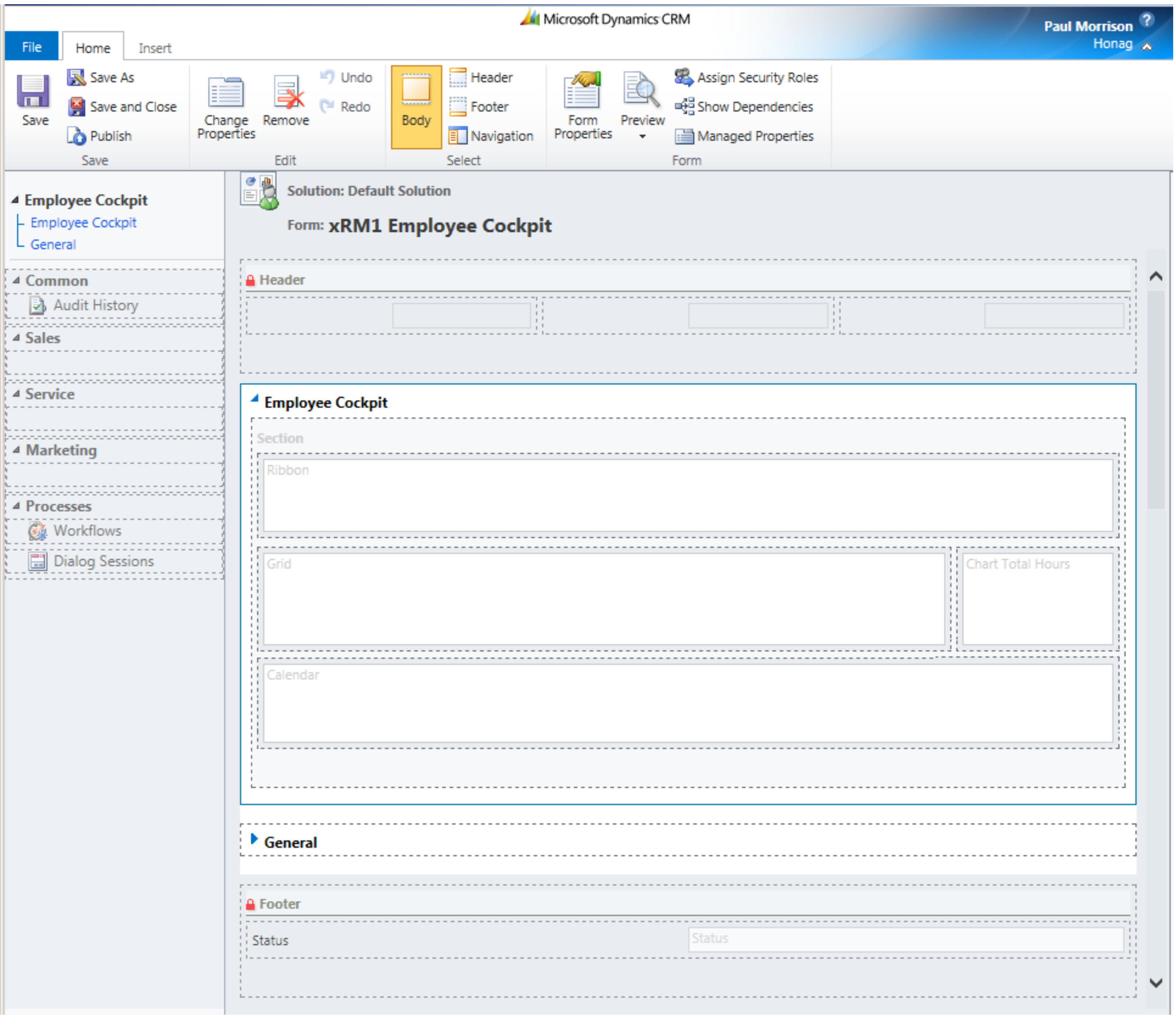
- Elements and views can be rearranged or removed individually
- New elements (iFrames) can be added
- Columns in the table grid can be added, removed or rearranged

Be aware that the appropriate security role is required (***"System Administrator"*** or ***"System Customizer"***).

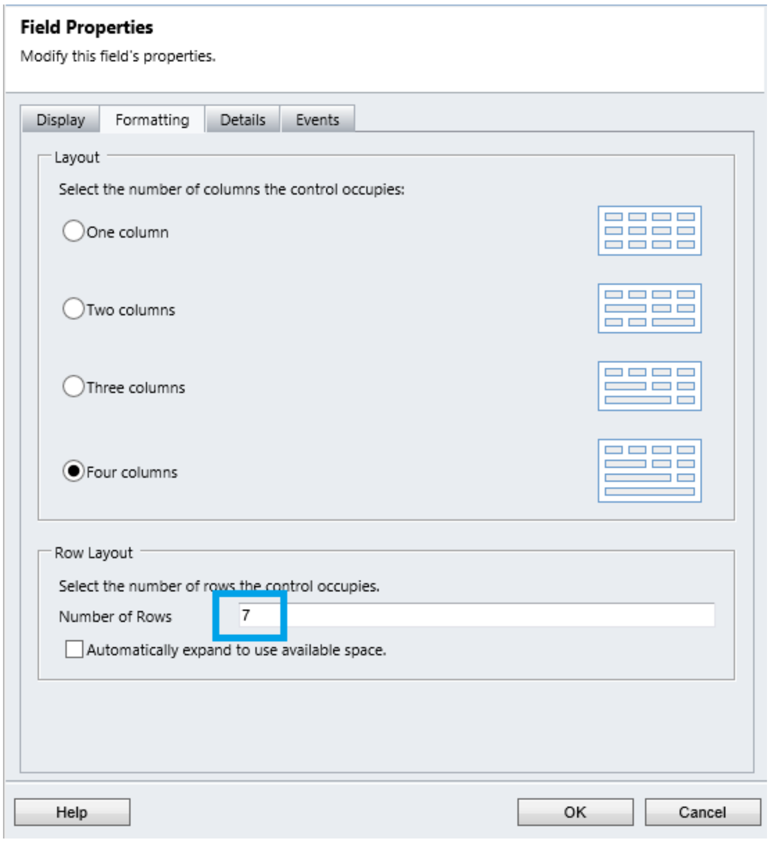
5.2.6.1 Modifying grids and views

To customize the Employee Cockpit grids and views, go to ***"Settings"*** => ***"Customizations"*** => ***"Customize the System"***.

Find the ***"xRM1 Employee Cockpit"*** entity and click on the ***"Employee Cockpit"*** form.



The three ***"Ribbon"***, ***"Grid"*** and ***"Calendar"*** areas are now displayed. They correspond to the relevant areas in the ***"Employee Cockpit"*** mask. You can replace or remove the elements by using standard Microsoft Dynamics customizing functions. To change the size of an area, click on the applicable element, go to the tab ***"Formatting"*** and then to ***"Row Layout"***. Change the amount of rows and (as a result) the size of the element will also increase or decrease.



5.2.6.2 Add new elements

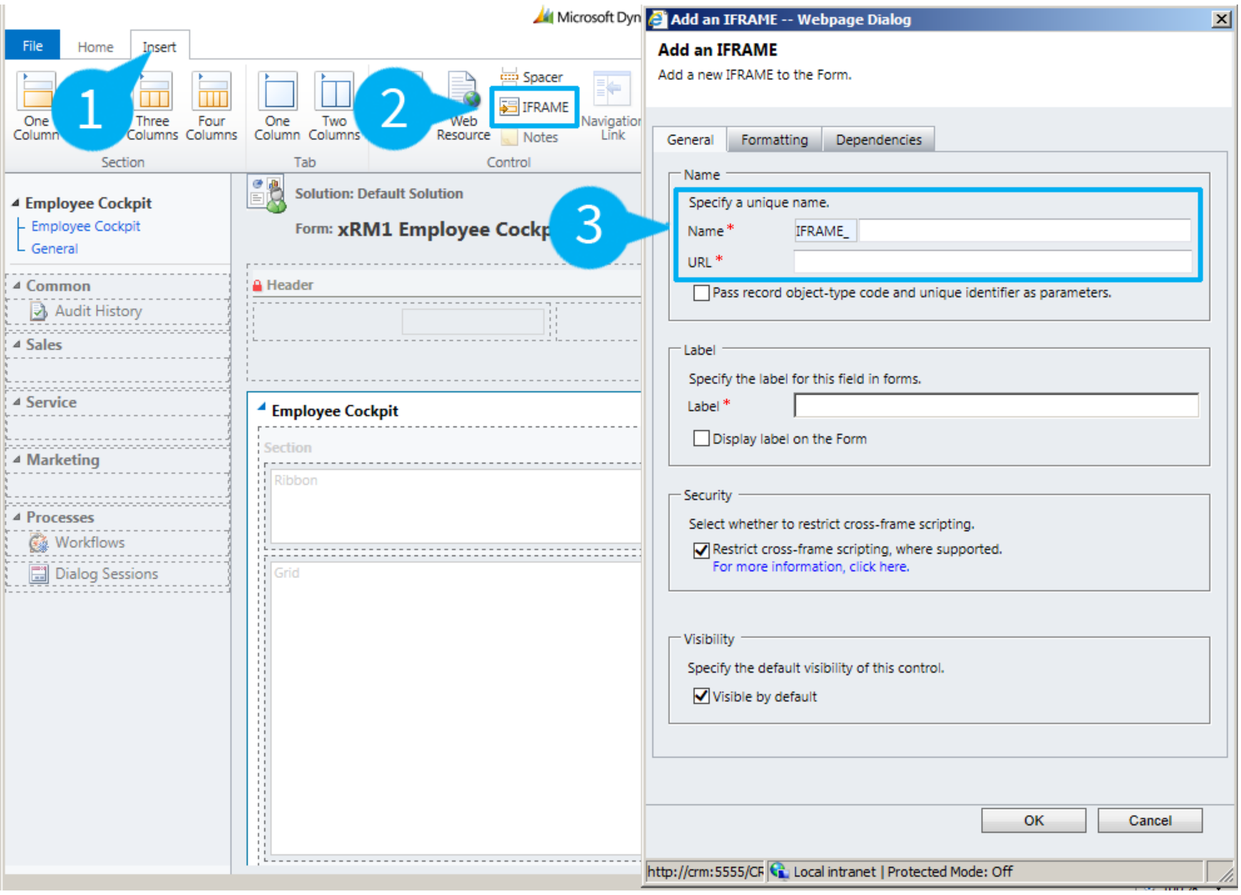
You can also add additional elements (iFrames) to the Employee Cockpit. To do this, use the ***"Insert"*** tab in the ***"Employee Cockpit"*** form.

You need to know the parameters of the iFrame, such as the iFrame-name and URL.

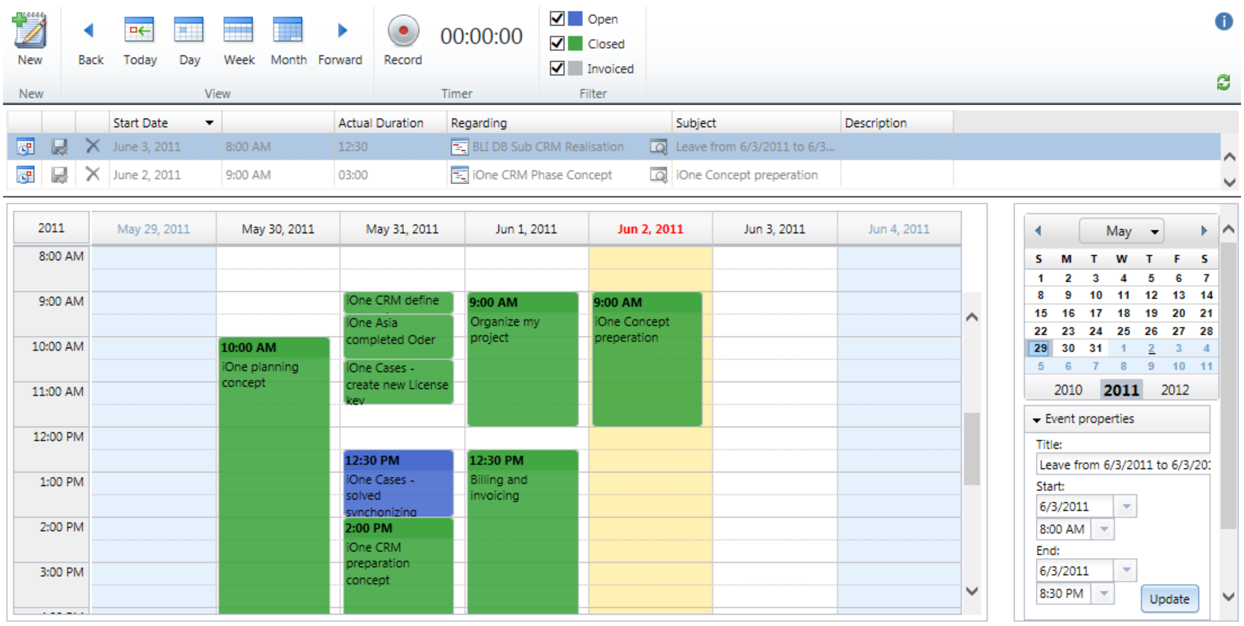
For example, you can add the CRM-Project Work Schedule (if you have the appropriate license) as a new iFrame. Use the following parameters:

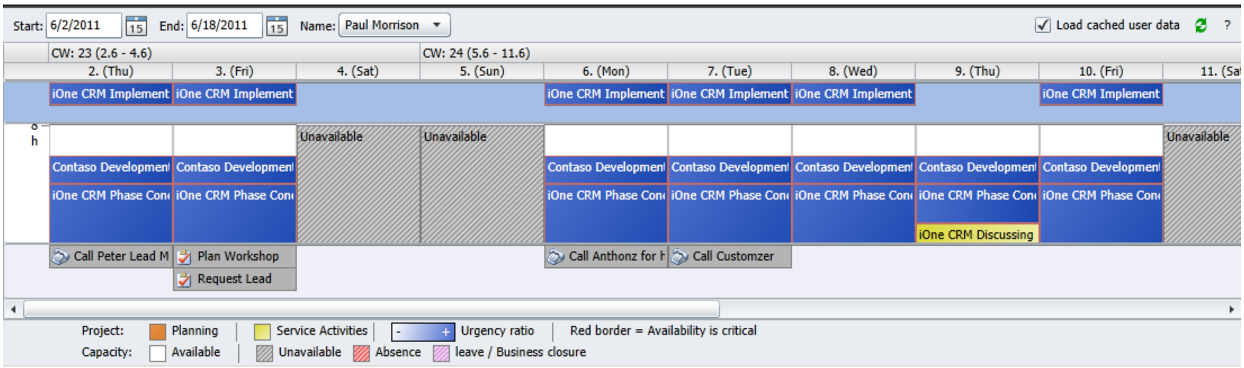
IFRAME_:xrm1_work_schedule

URL: http://crm:5555/CRM/WebResources/itarapro_/web/PersonalWorkSchedule.html?userlcid=1033



After saving and publishing, you can see the following result:





5.2.6.3 Add, remove or rearrange columns in the table grid

You can also rearrange, add or remove the columns in the table grid:

			Start date	Start time	End time	Duration	Regarding	Title	Description
			June 3, 2011	9:00 AM	2:00 PM	05:00	iOne CRM Phase Concept	iOne CRM Conzept Project Organ...	
			June 2, 2011	1:30 PM	2:30 PM	01:00	License expired	Create new License	
			June 2, 2011	9:00 AM	12:00 PM	03:00	iOne CRM Phase Concept	iOne Concept preperation	
			June 1, 2011	12:30 PM	5:30 PM	05:00	Honag Inc	Billing and invoicing	

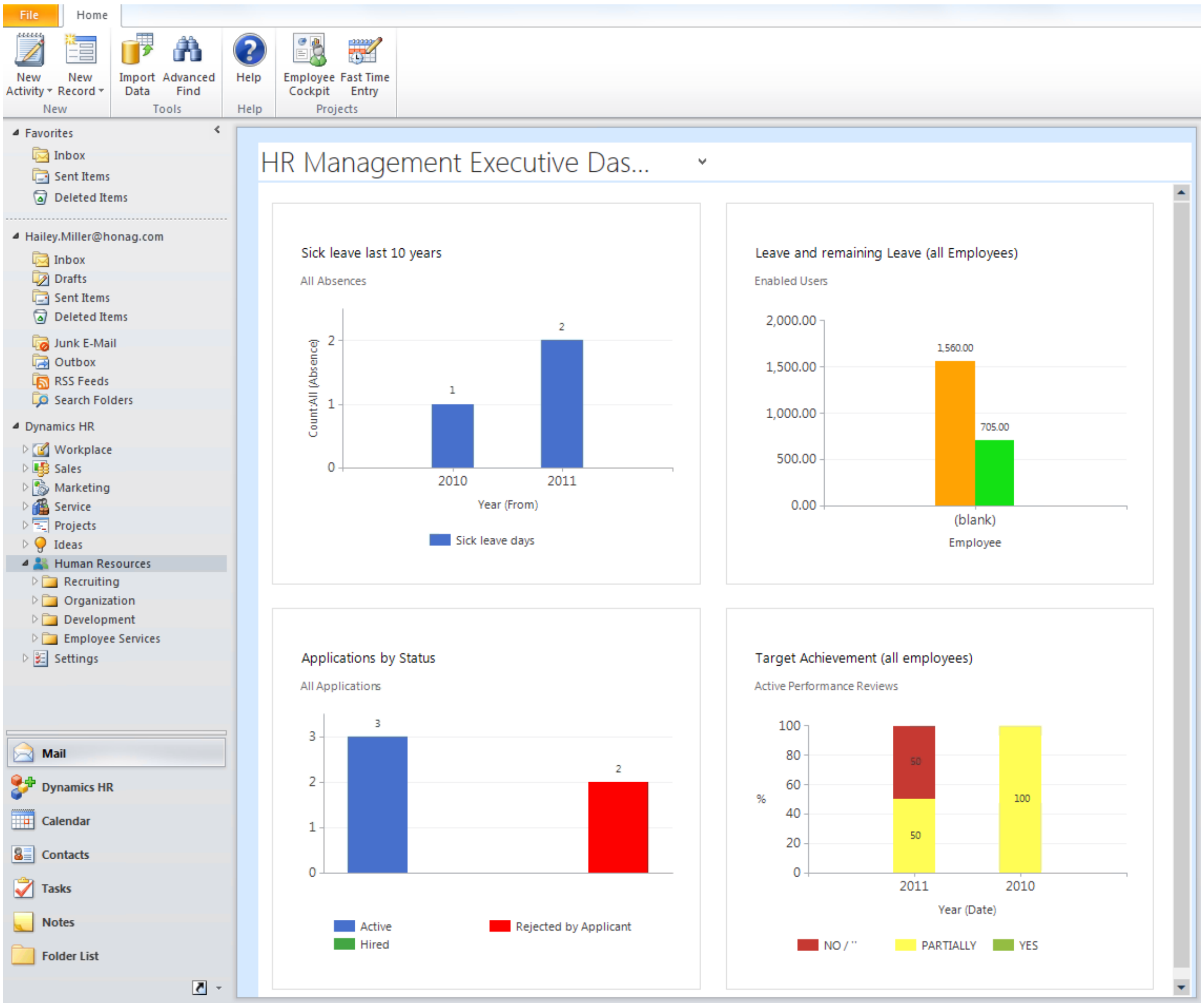
To do this, go to ***"Settings"*** => ***"Customizations"*** => ***"Customize the System"*** => ***"Activity"*** => ***"Views"*** => ***"Inactive Public Views"*** and then select the ***"xRM1 Employee Cockpit Grid"***. Now you can add, remove or rearrange the columns through standard Microsoft customizing functions.

6 My Work – HR Management Controlling

6.1 Dashboards

"xRM1 HR Management" offers dashboards for HR managers and employees.

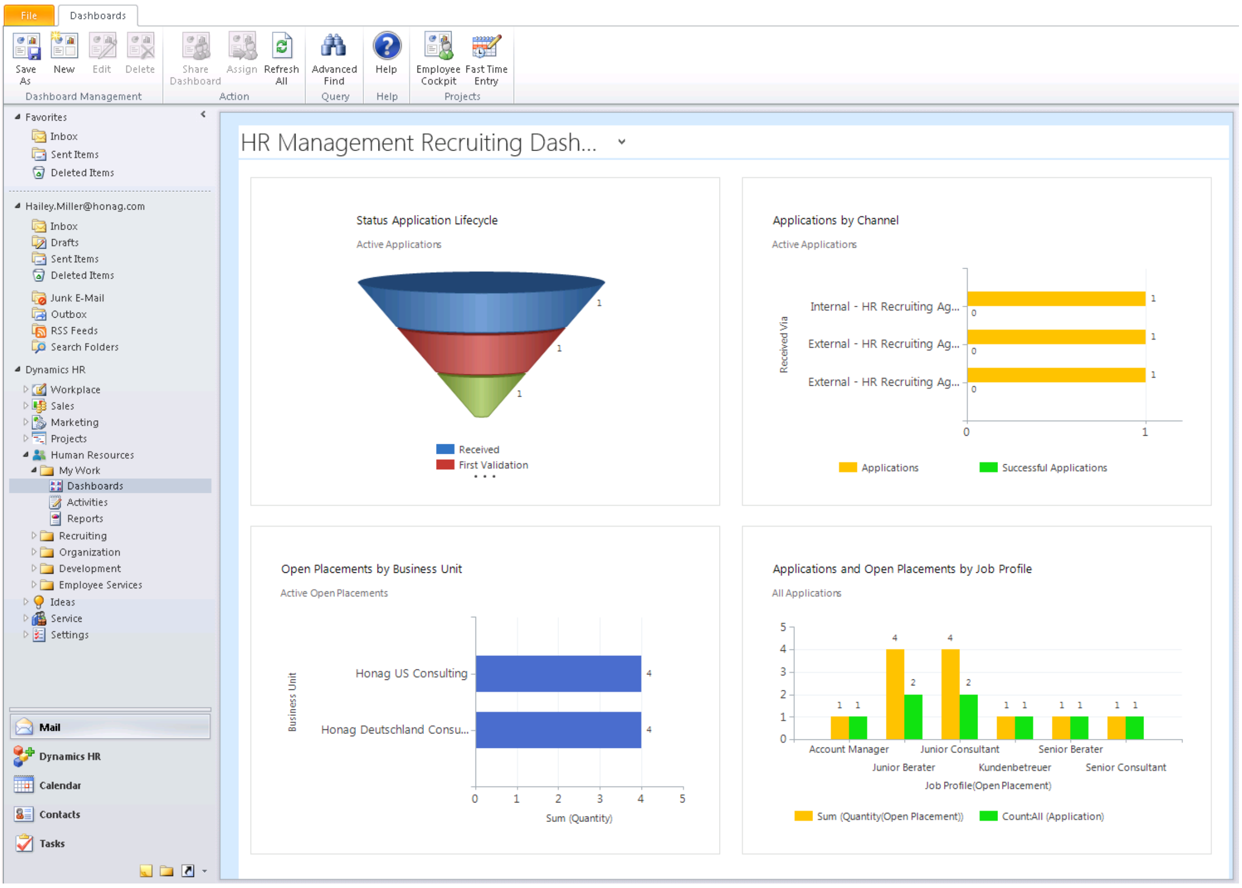
6.1.1 HR Management Executive Dashboard



The most important parameters for HR Executives can be seen at a glance. This dashboard includes the following charts:

- ***"Sick leave last 10 years"***: This chart adds up the total amount of days considered as sick leave over the last ten years.
- ***"Leave and remaining Leave (all employees)"***: Comparison of leave and remaining leave for all employees.
- ***"Applications by Status"***: Overview of the applications, sorted by status.
- ***"Target Achievements (all employees)"***: This chart shows how many percent of all employees' targets have been completed (totally or partially) or not.

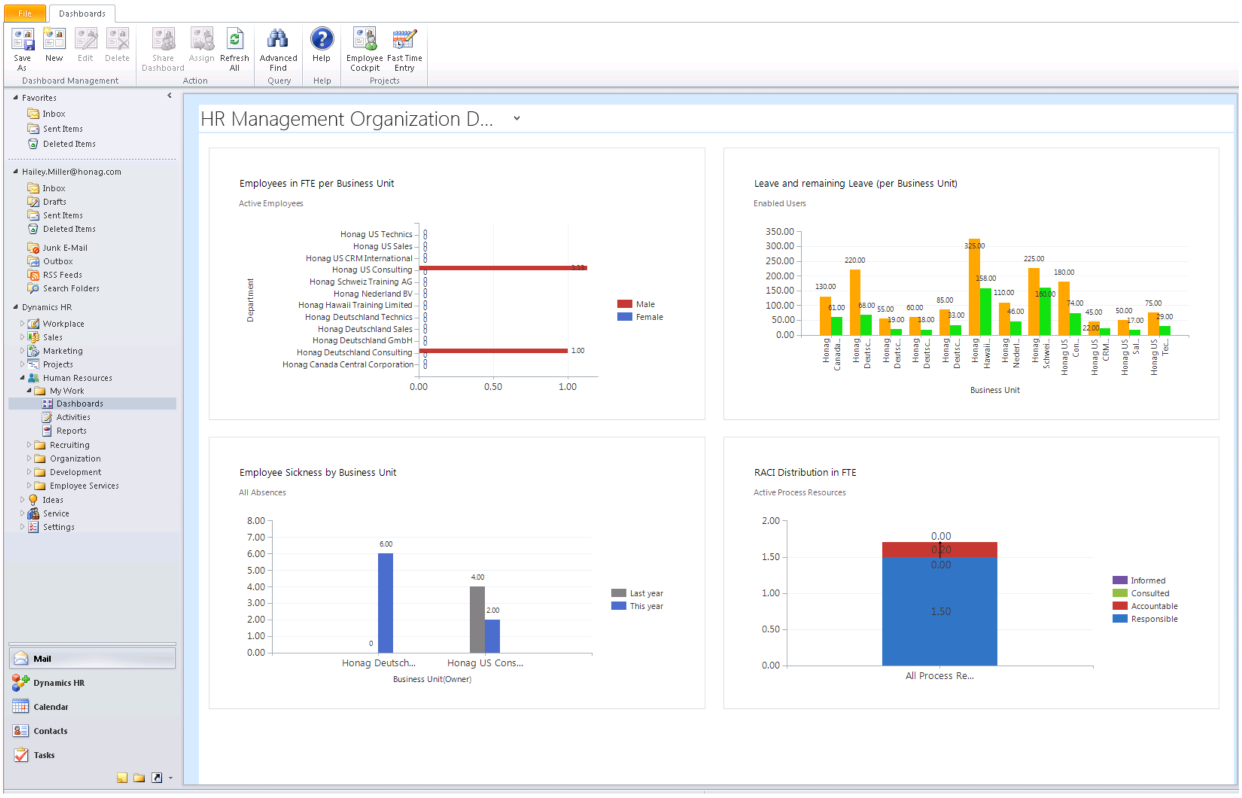
6.1.2 HR Management Recruiting Dashboard



The dashboard for HR recruiting includes the following charts:

- ***"Status Application Lifecycle"***: This funnel chart gives an overview of the amount of applications in each status reason.
- ***"Applications by Channel"***: Total amount of applications and successful applications for each recruiting channel.
- ***"Open Placements by Business Unit"***: Amount of open placements, sorted by business unit.
- ***"Applications and Open Placements by Job Profile"***: This chart compares the number of open placements per job profile to the respective applications.

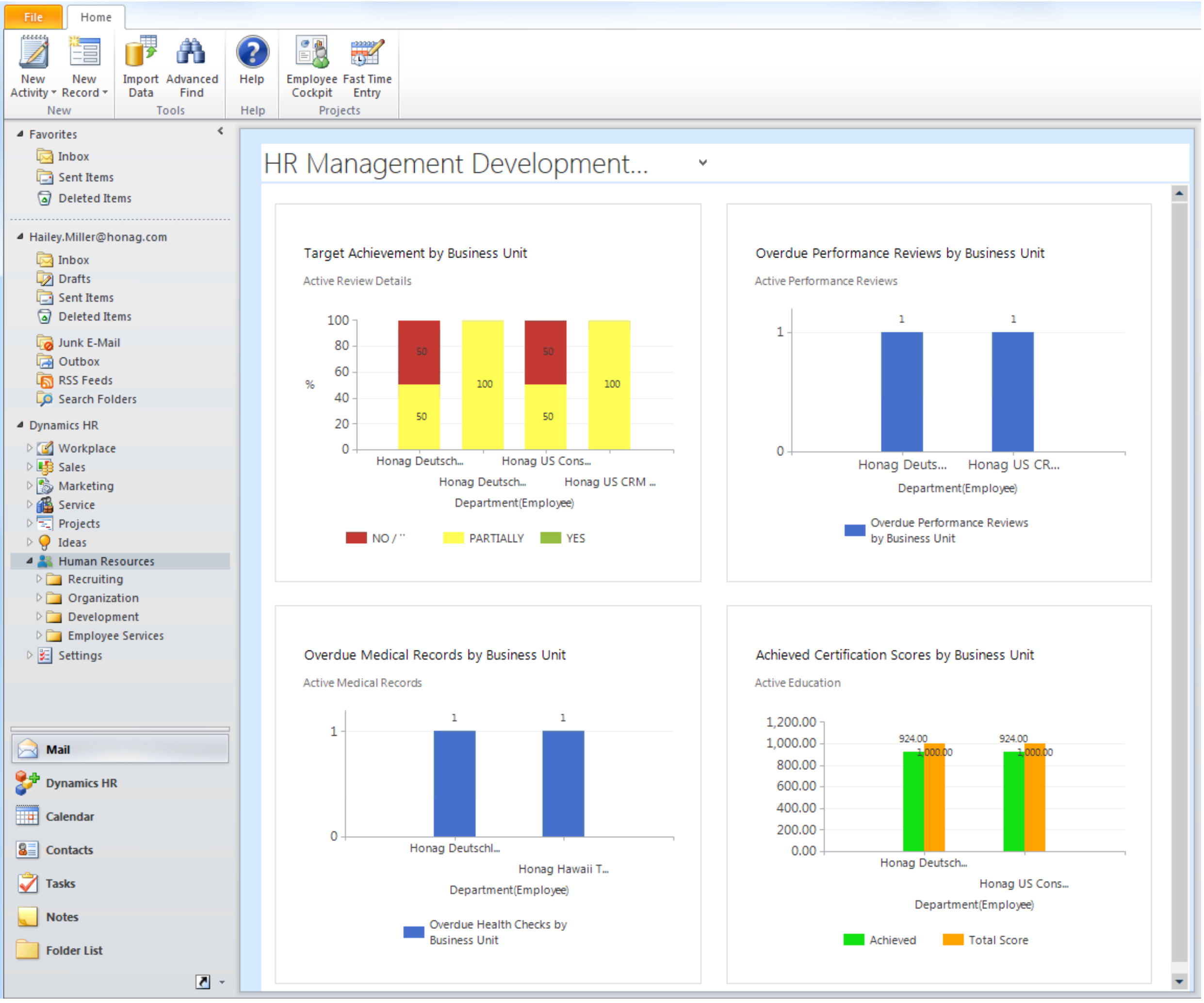
6.1.3 HR Management Organization Dashboard



The most important parameters concerning HR Organization can be seen at a glance. This dashboard includes the following charts:

- ***"Employees in FTE per Business Unit"***: This chart adds up the amount of assigned FTE, sorted by business unit.
- ***"Leave and remaining Leave (per Business Unit)"***: Comparison of leave and remaining leave, sorted by business unit,
- ***"Employee Sickness by Business Unit"***: Overview of sick leave days, sorted by business unit
- ***"RACI Distribution in FTE"***: This chart shows how many FTE are assigned to which RACI role.

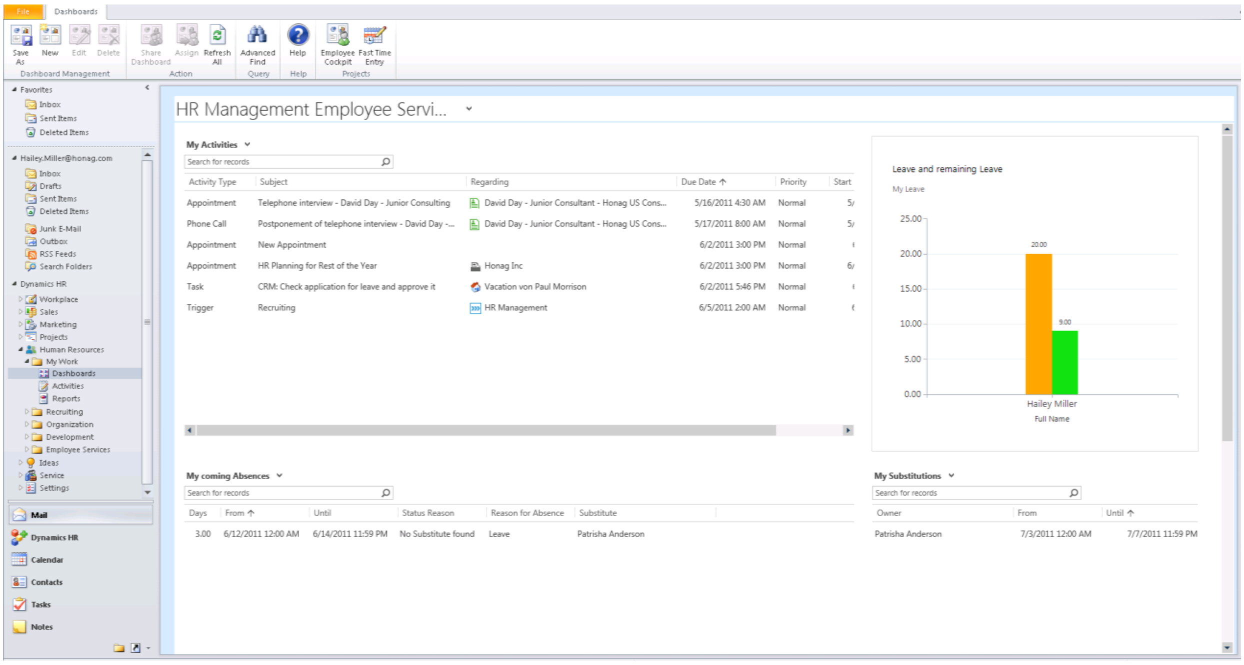
6.1.4 HR Management Development Dashboard



The dashboard for HR development includes the following charts:

- ***"Target Achievement by Business Unit":*** This chart shows how many percent of the targets of a business unit have been completed (totally or partially) or not.
- ***"Overdue Performance Reviews by Business Unit":*** Overview, how many performance reviews for employees are overdue, sorted by business unit.
- ***"Overdue Medical Records by Business Unit":*** This chart shows how many medical records for employees are overdue, sorted by business unit.
- ***"Achieved Certification Scores by Business Unit":*** The user can get an impression, how many points of how many total points were achieved at in education exams and certificates, sorted by business unit.

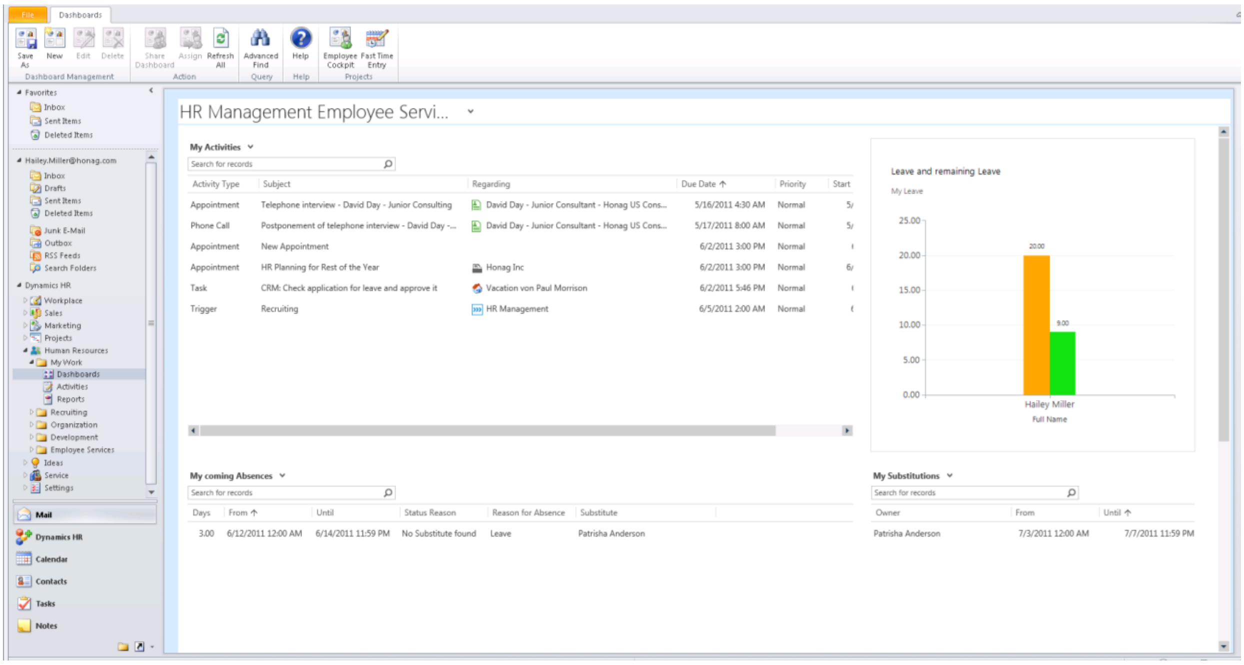
6.1.5 HR Management Employee Services Dashboard



This dashboard displays charts and lists concerning relevant HR features for each employee:

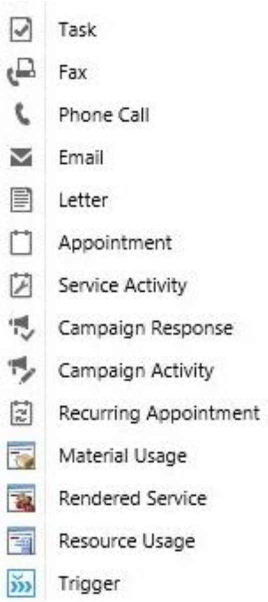
- ***"My Activities":*** Overview of the employee's activities.
- ***"Leave and remaining Leave"***: Comparison of the employee's leave and remaining leave.
- ***"My coming Absences"***: The employee's upcoming absences.
- ***"My Substitutions"***: List of dates when the employee is a substitute for a colleague.
- ***"Internal open Placements"***: List of open placements which have been published internally.
- ***"My Target Achievements"***: This chart shows how many percent of the employee's targets have been completed (totally or partially) or not.

6.2 Activities



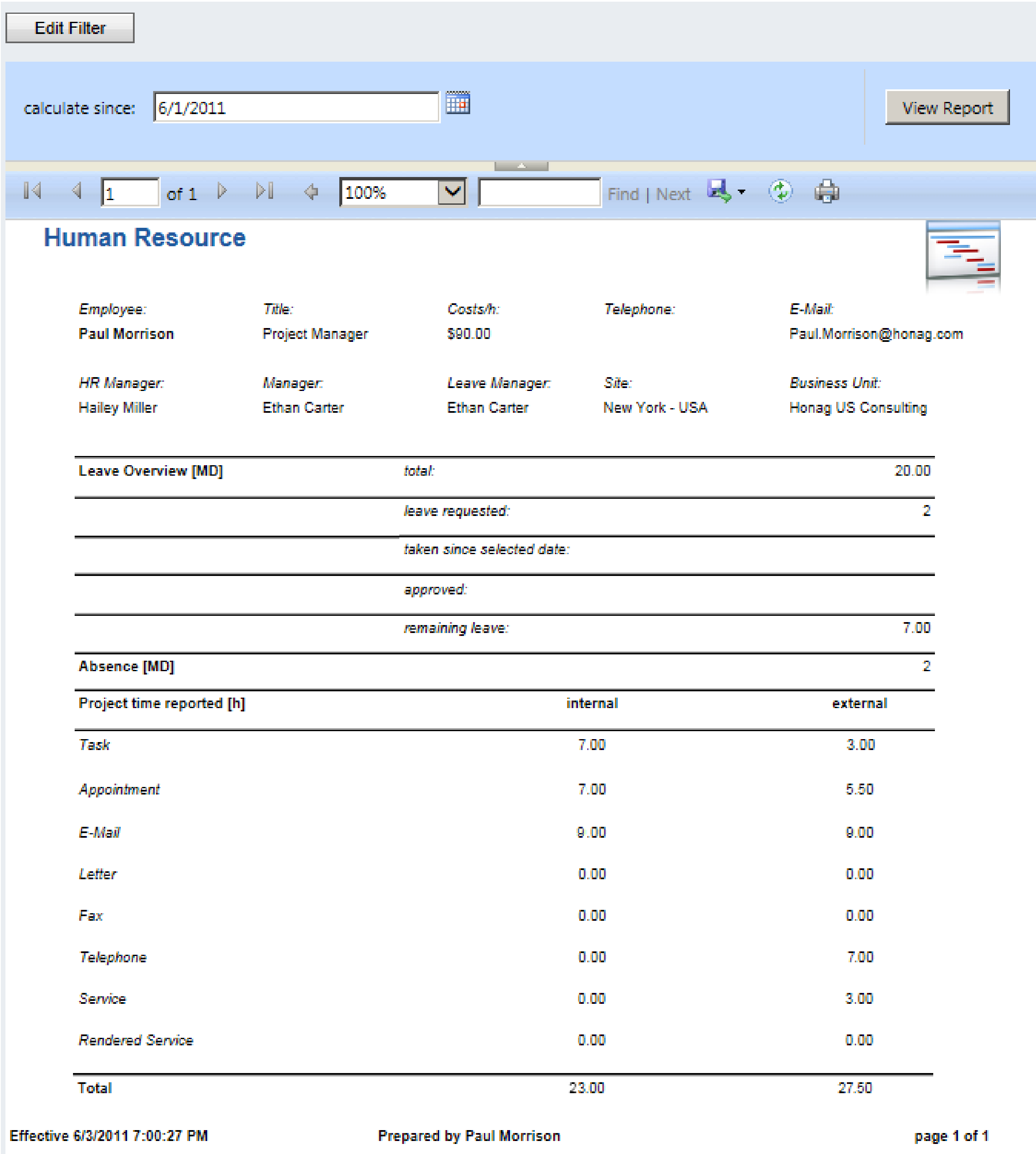
As default chart, ***"Activities by month"*** is displayed in the Outlook start screen of this entity. A column chart shows the activities per month, sorted by status reason.

Below you will see an overview of all available activities:



Depending on the user's security roles, he/she may use Microsoft Dynamics standard activities. In case ***"CRM-Project"*** is available, the user may also use ***"Material Use"***, ***"Rendered Service"*** and ***"Resource Usage"***.

6.3 Human Resource Report



Edit Filter

calculate since: 6/1/2011 View Report

1 of 1 100% Find | Next

Human Resource

Employee:	Title:	Costs/h:	Telephone:	E-Mail:
Paul Morrison	Project Manager	$90.00		Paul.Morrison@honag.com
HR Manager:	*Manager:*	*Leave Manager:*	*Site:*	*Business Unit:*
Hailey Miller	Ethan Carter	Ethan Carter	New York - USA	Honag US Consulting

Leave Overview [MD]	*total:*	20.00
	leave requested:	2
	taken since selected date:	
	approved:	
	remaining leave:	7.00
Absence [MD]		2

Project time reported [h]	**internal**	**external**
Task	7.00	3.00
Appointment	7.00	5.50
E-Mail	9.00	9.00
Letter	0.00	0.00
Fax	0.00	0.00
Telephone	0.00	7.00
Service	0.00	3.00
Rendered Service	0.00	0.00
Total	23.00	27.50

Effective 6/3/2011 7:00:27 PM **Prepared by Paul Morrison** **page 1 of 1**

The ***"Human Resource"*** report offers an overview of an employees' HR base data, his/her leave and absences, as well as reported project time.

The date from which the report data should be displayed, can be selected in the ***"Calculate since"*** field.

The HR base data consist of the following fields:

"Employee": The employee for whom the report was selected.

"Title": The employee's job title.

"Costs/h": The employee's hourly rate.

"Telephone": The employee's phone number.

"E-Mail": The employee's e-mail address.

"HR Manager": The HR representative responsible for the employee.

"Manager": The employee's direct supervisor.

"Leave Manager": The person who approves the employee's absences/leave.

"Site": The site of the employee's business unit.

"Business Unit": The employee's business unit.

In the ***"Leave overview [MD]"*** and ***"Absence"*** section, the following fields are displayed:

"Total": The total amount of the employee's vacation days.

"Leave requested": Number of vacation days the employee has requested.

"Taken since selected date": Amount of vacation days the employee has taken since the selected day.

"Remaining Leave": Number of vacation days remaining.

"Absence [MD]": The employee's number of absence days.

Finally, the internal and external "Project time reported [h]" will be displayed for the following activities:

- ***"Task"***,
- ***"Appointment"***,
- ***"E-Mail"***,
- ***"Letter"***,
- ***"Fax"***,
- ***"Telephone"***,
- ***"Service"*** and
- ***"Rendered Service"***.

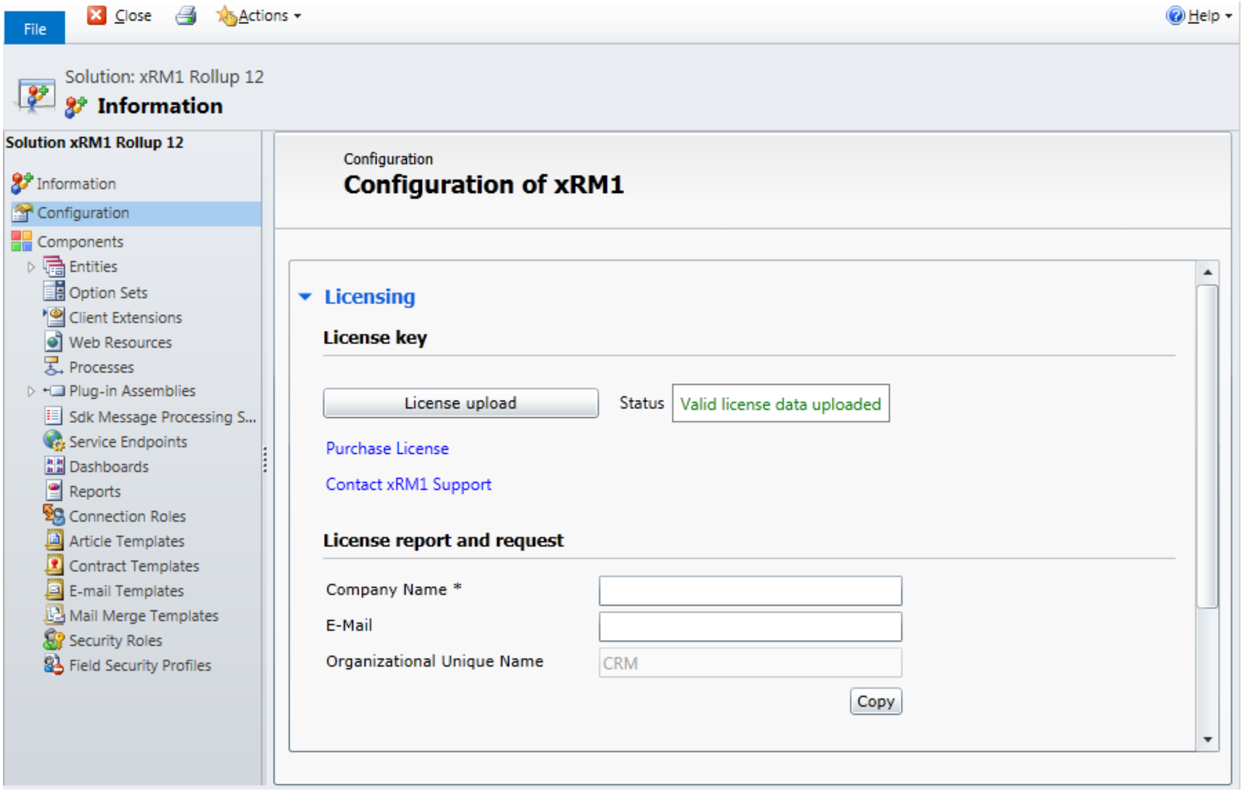
7 Rights and roles concept

7.1 Default settings

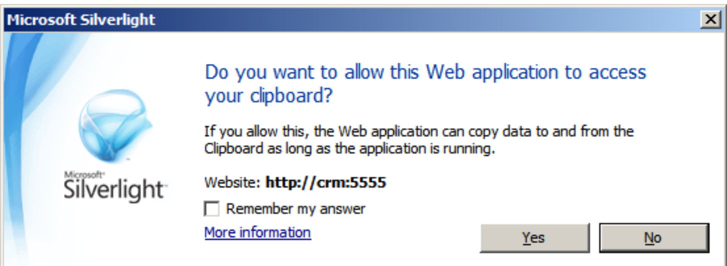
7.1.1 Licensing

You can enter and save your license in the license field. This field can be found under ***"Configuration"***, when selecting the relevant solution under ***"Settings"*** --> ***"Solutions"***.

For creating a license, your Microsoft Dynamics Organization Unique Name is required. Your MS Organization Unique Name is determined automatically and is displayed directly on the configuration screen. With the integrated copy function the name, as well as other license relevant data (company name and e-mail), can be readout and forwarded.



In order to create your data for the license, please enter them in the respective fields under ***"License report and request"*** and press ***"Copy"***. Please confirm the copying by pressing ***"Yes"***, when you are prompted with the Silverlight window, as shown below.



Now, we ask that you paste your data (***"Strg"+"V"***) into an editor or directly into an e-mail.

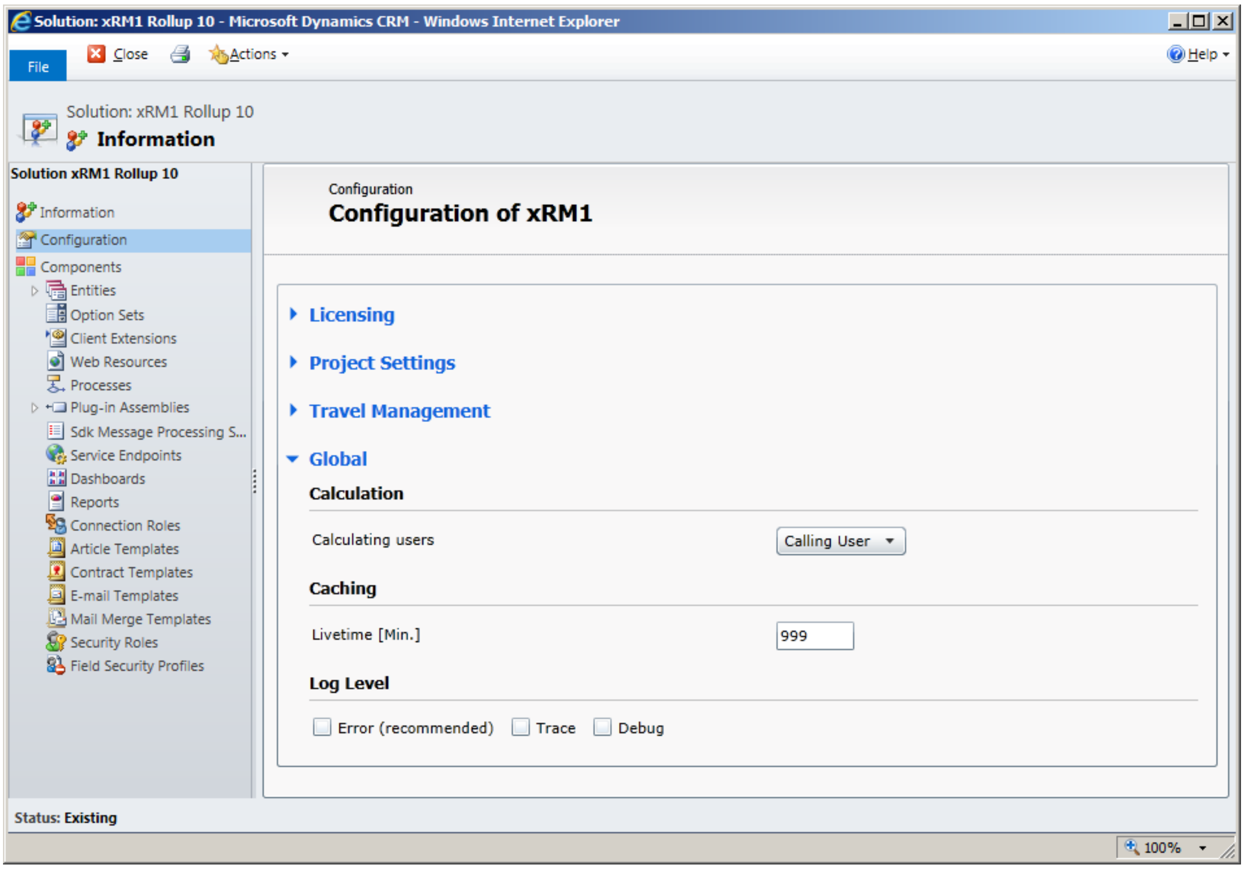
The data is saved as an XML string and appears as follows:

<LicenseInformation><CompanyName>Firma XY</CompanyName><EMail>firmaxy@email.com</EMail><OrgUniqueName>CRM</OrgUniqueName></LicenseInformation>

Please do not modify the record, but rather send it directly to xRM1, along with information about the desired license types and their amounts, by using the license request form in the portal. Please refer to the website www.xRM1.com for license requests.

The license file will then be created and sent to you via e-mail. The license can be used right away, after you've uploaded it into the solution.

7.1.2 Global



"Caching": Specify how long cashed user specific calendar availability should be valid for. The less often you change the calendar settings (e.g. user work hours), the more you can increase the values.

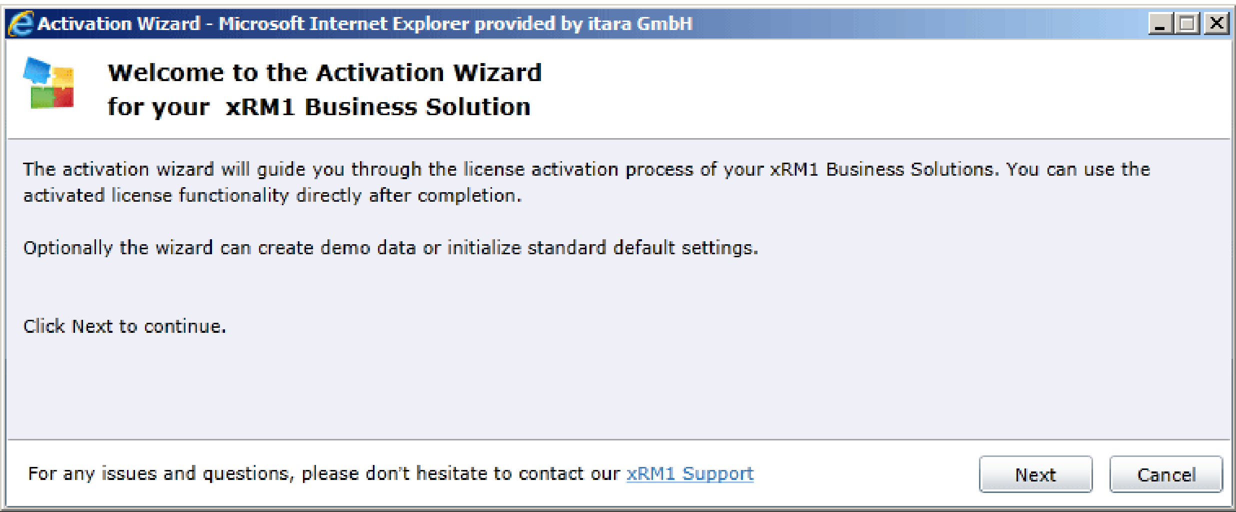
"Log Level": Specify the log level for the xRM1 solution. We recommend the ***"Error"*** setting.

7.2 Installation

Instructions on how to install the solution can be found in our ***"Getting Started Guide"***. You can download this from the xRM1 website. The guide can be found under ***"Products", "xRM1 HR Management"***, and ***"Downloads"*** (on the right hand side).

7.3 Solution activation (Activation Wizard)

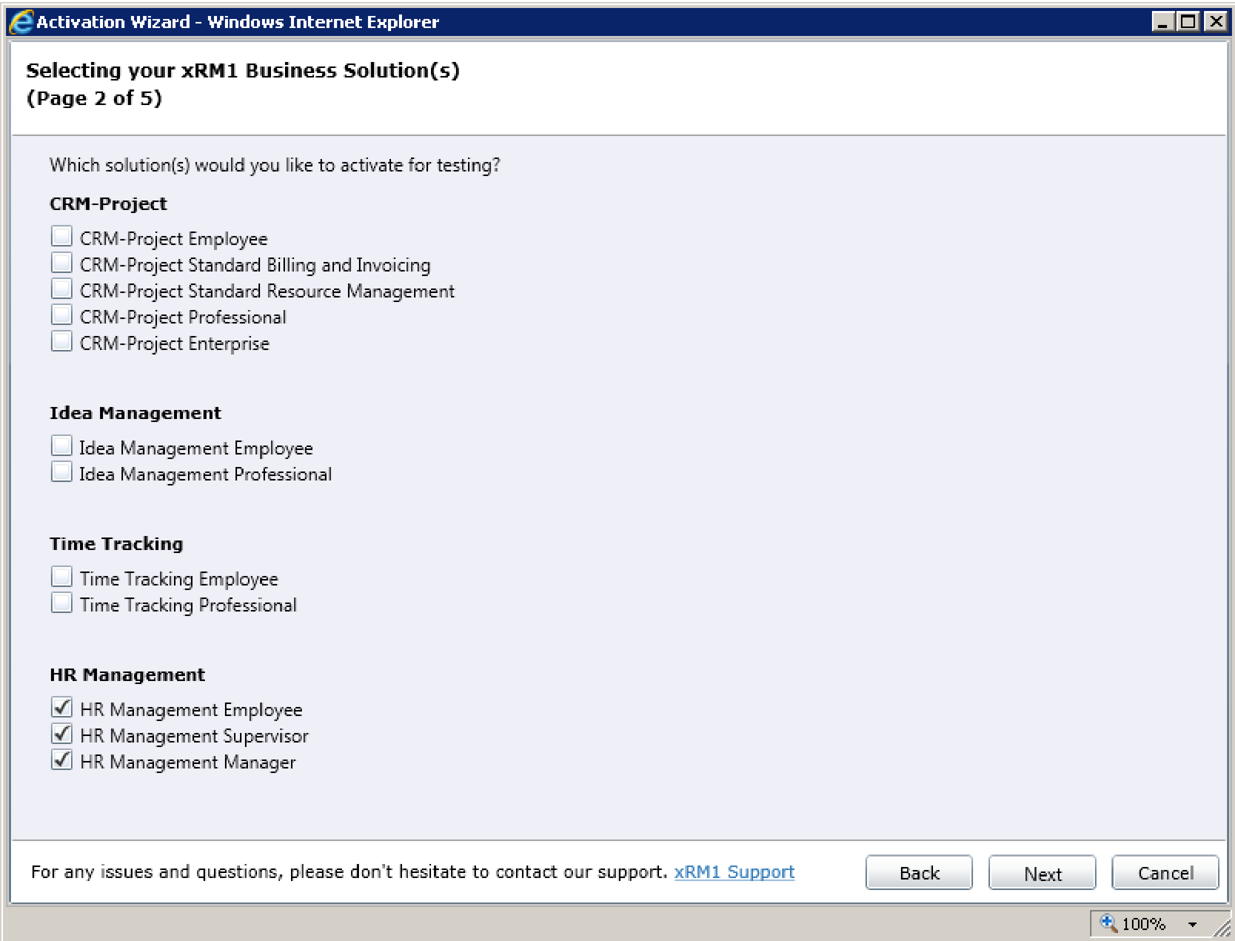
Activating the solution can be done easily with the ***"Activation Wizard"***. This can be found on the ribbon bar under ***"Settings" → "xRM1 License Types"***.



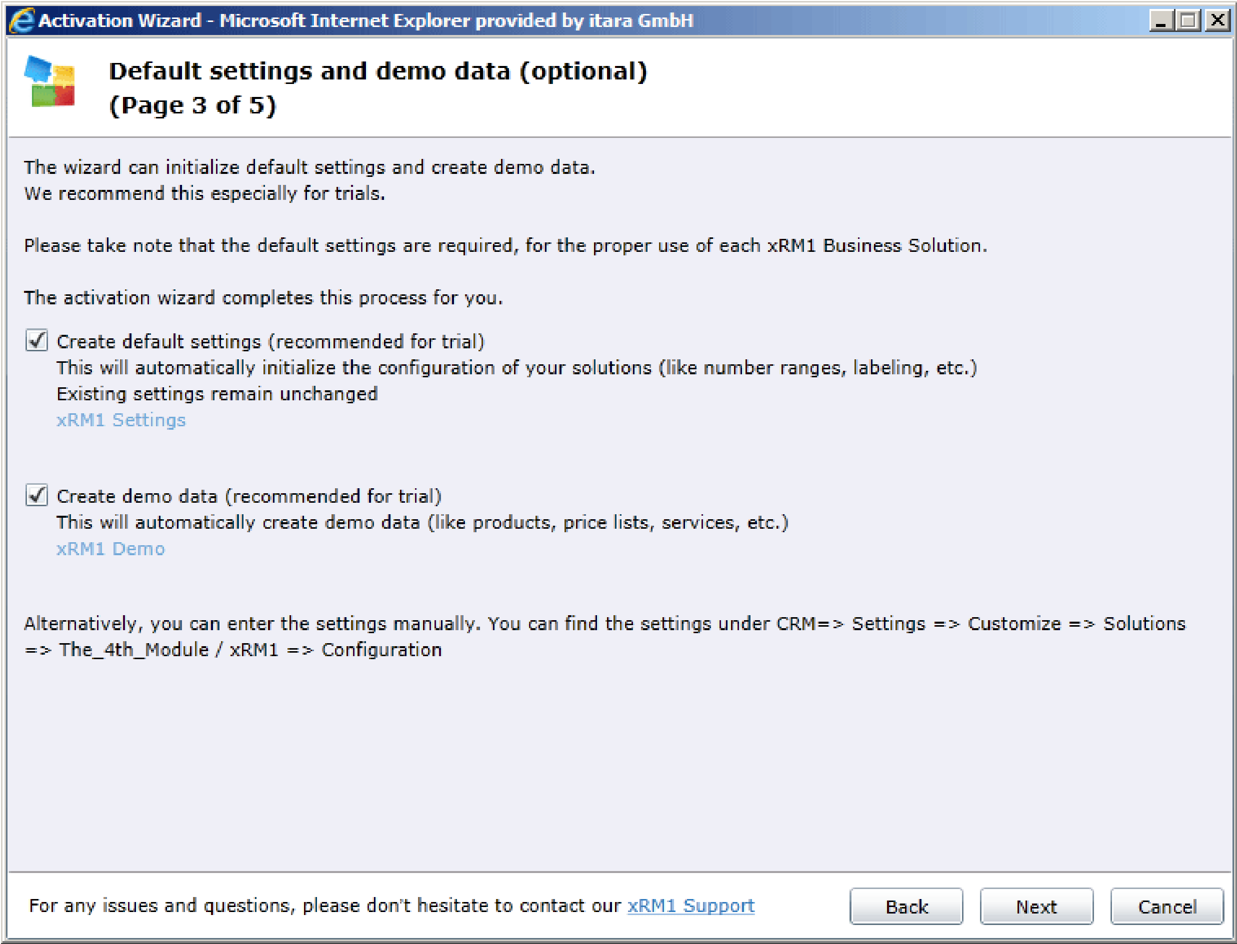
You will begin by being asked whether you would like to activate a test version, temporary or purchased license.

7.3.1 Activating a free trial

Here, you choose the solution(s) which you would like to be activated, by checking the applicable boxes.



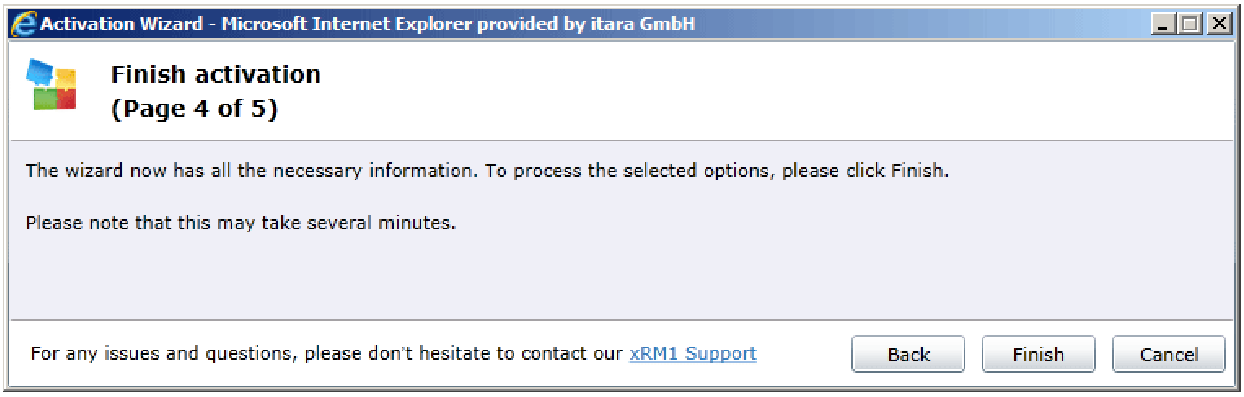
In the next step you have the option to create default settings and base data. Please select the applicable boxes.



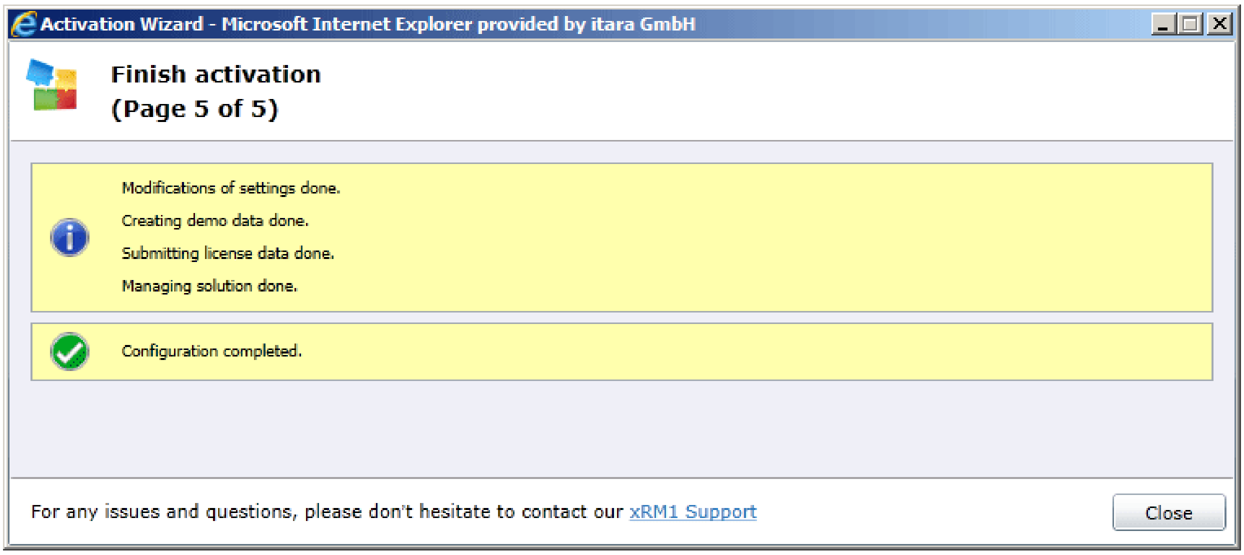
We recommend applying the default settings in the instance you are running a test version or when you would like to quickly and productively start your xRM1 business solution. For advanced use, additional configurations are recommended. The following data will be created:

Setting	***Default***	***Description***
Hours per Man Day [h]	8	Select the number of work hours, per work day, of a full-time employee.
Number of recently used regarding entities	5	Specify how many recetly used items to list in the Fast Time Entry
How long Time Entry can be edited [h]	24	The length of time in which corrections can be made to Fast Time Entries.
Current project number	0000001	Number sequence for automatic project numbering.
Project number prefix	PRO	Prefix for automatic project numbering
Travel time/travel expenses added to the project	Active	This setting specifies whether associated trips, travel times, and related travel expenses should be added to a project or not.
Current travel number	0000001	Number sequence for automatic travel numbering.
Travel number prefix	TRV	Prefix for automatic travel numbering.
Current receipt number	0000001	Number sequence for automatic receipt numbering.
Receipt number prefix	VOU	Prefix for automatic receipt numbering.
Cache	500	Length of time in which cached user-specific calendar availability should be valid for.
Log level	Error	Here, the log level is set.

The activation can subsequently start.

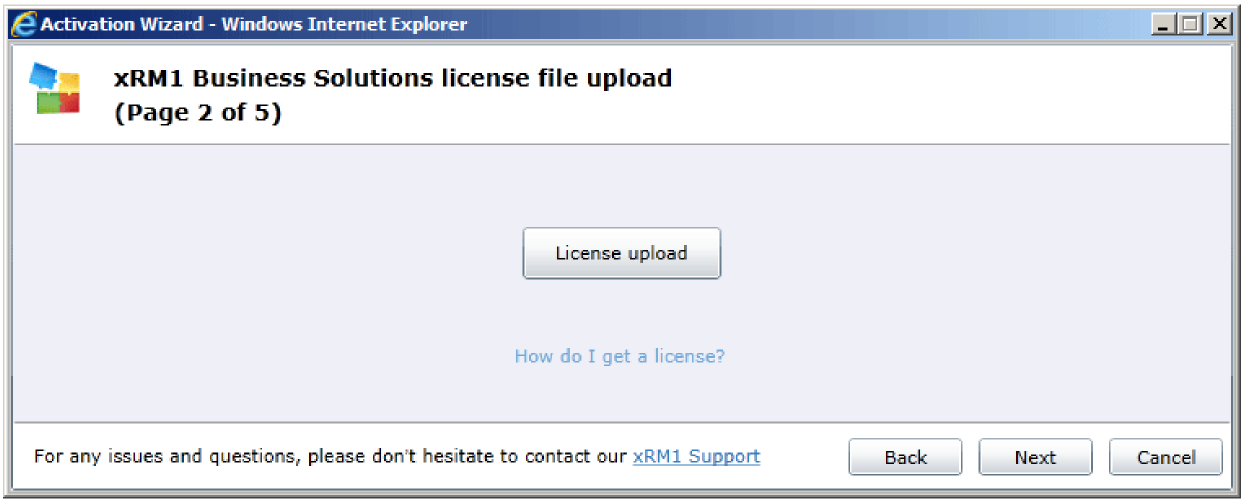


After the activation has finished, the following message will appear.

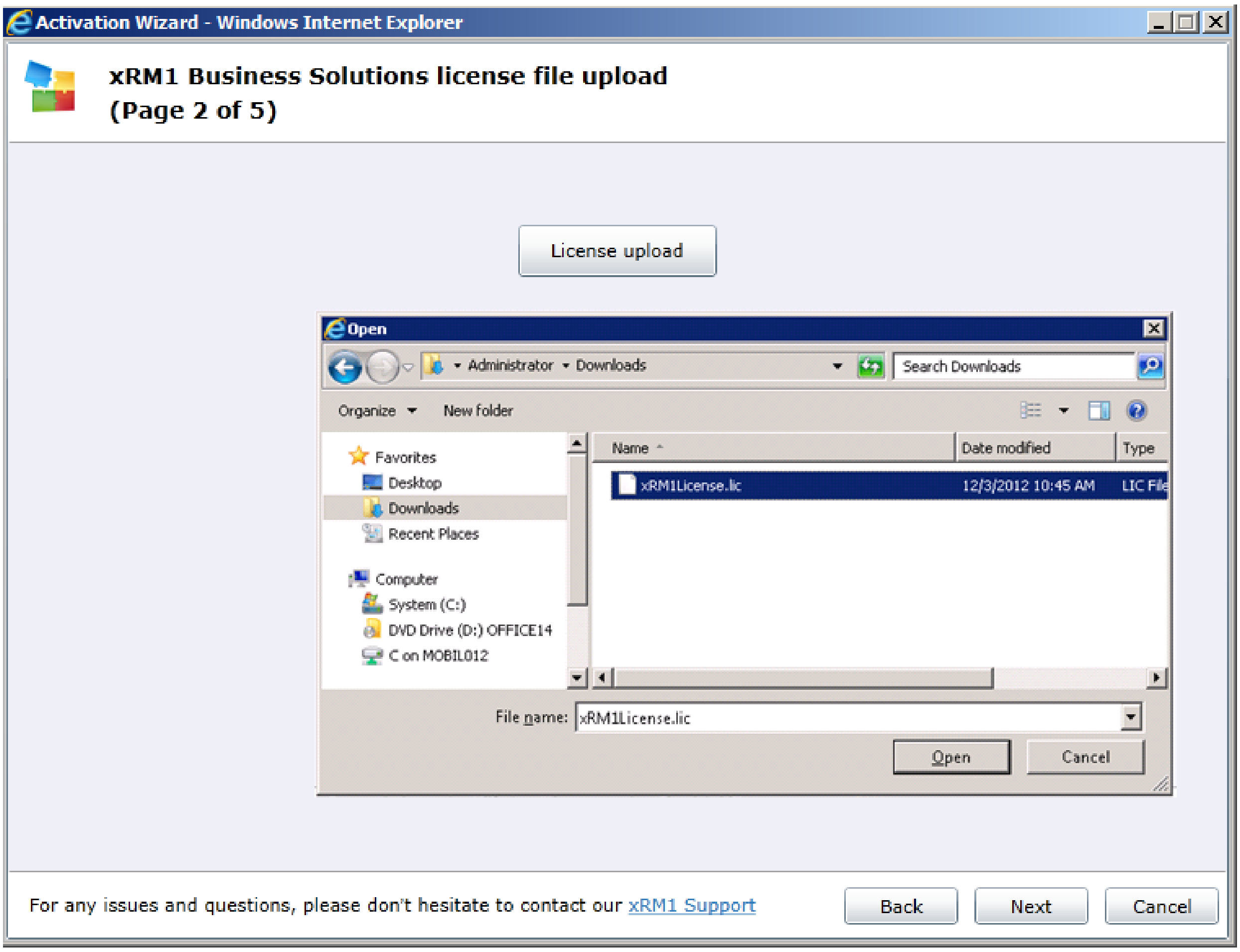


7.3.2 Activating temporary or purchased license(s)

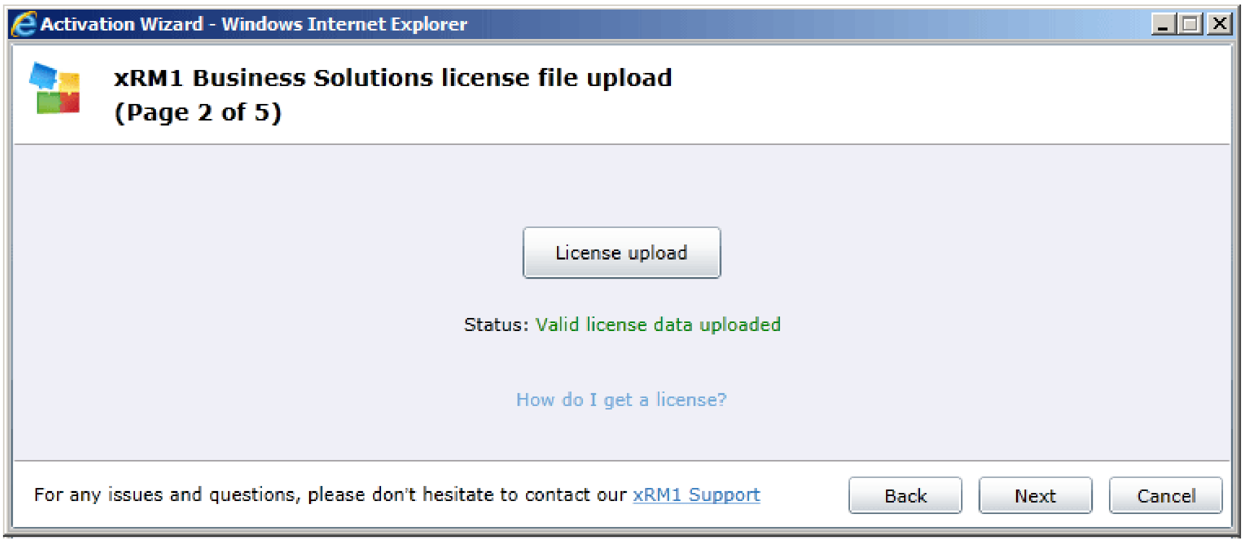
When you select the option to activate a temporary or permanent license, a window will appear where you will be able to upload the license.



Selecting the corresponding button will prompt an Internet Explorer window to open, allowing you to select your saved license data.



After selecting ***"Open"***, the data will be uploaded and a message will appear indicating whether you have uploaded a valid or expired license.



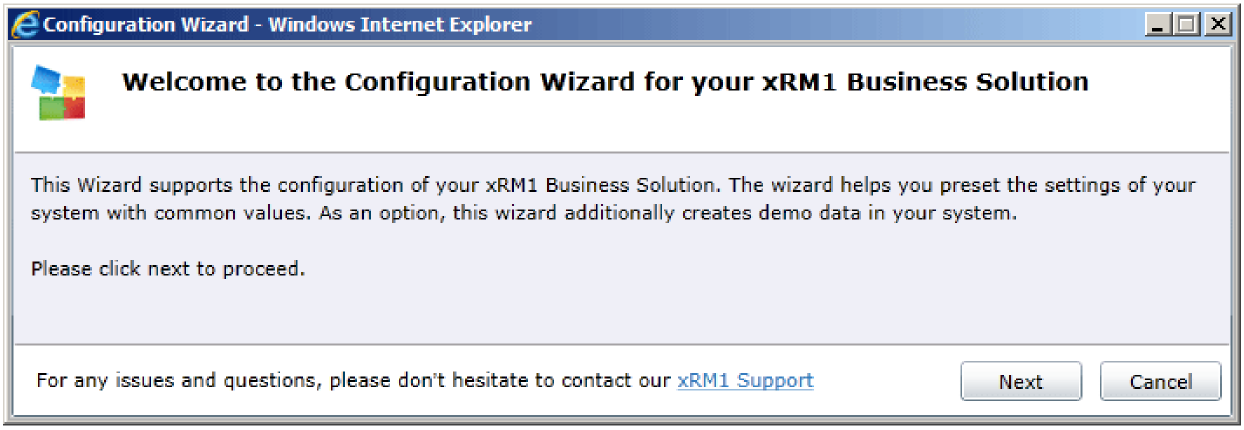
The next few steps are identical with steps 3 to 5, with free test licenses. Next, select whether you would like to implement standard settings and/or basic data/demo data. This will subsequently help to activate the license as well as complete the activation.

You can also request and upload your license through the xRM1 Configuration window. For more information, please see chapter 7.1.1.

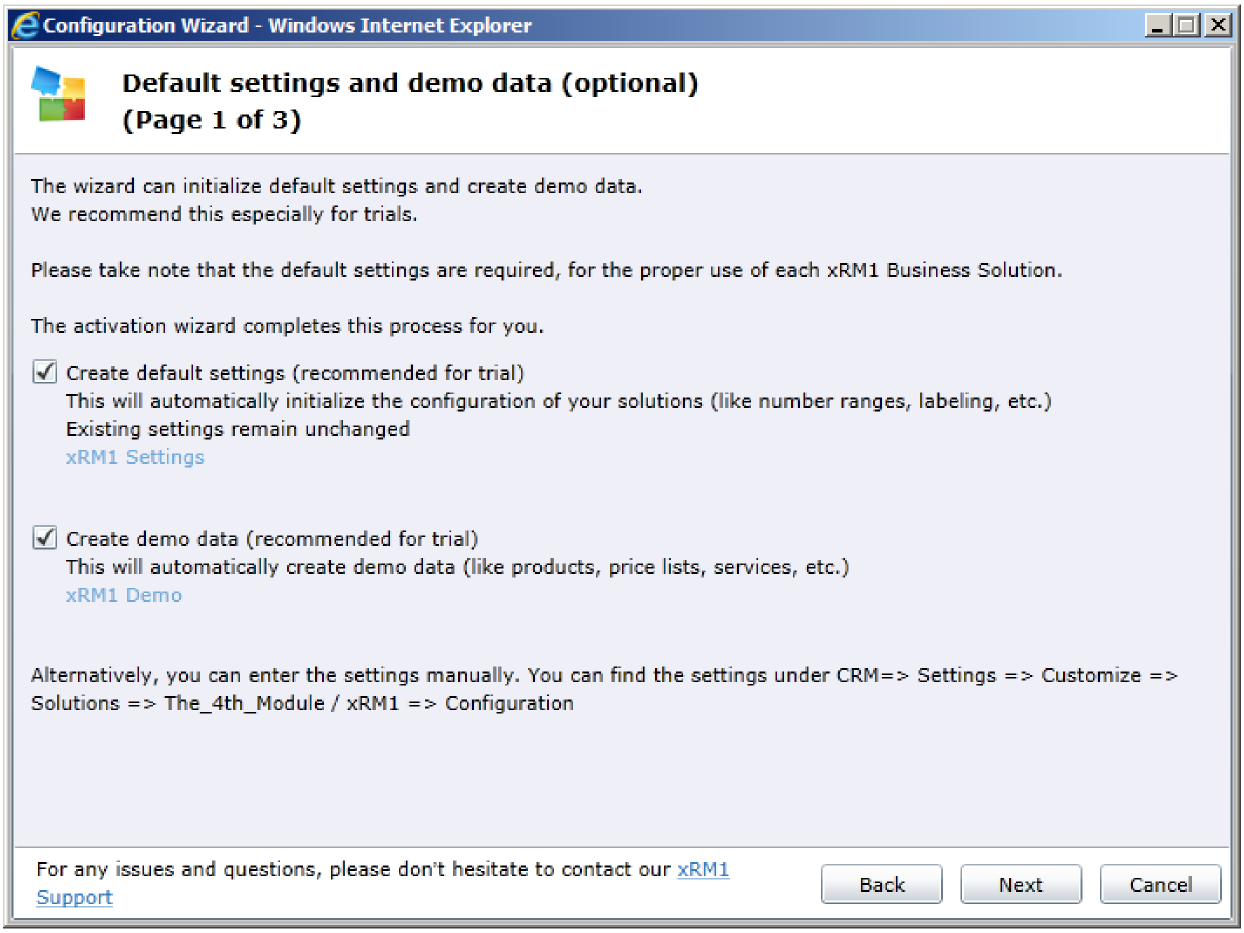
7.4 Solution configuration (Configuration Wizard)

The Configuration Wizard is a part of the Activation Wizard but can be run separately. This can be the case when basic data/demo data or settings will be created at later point in time.

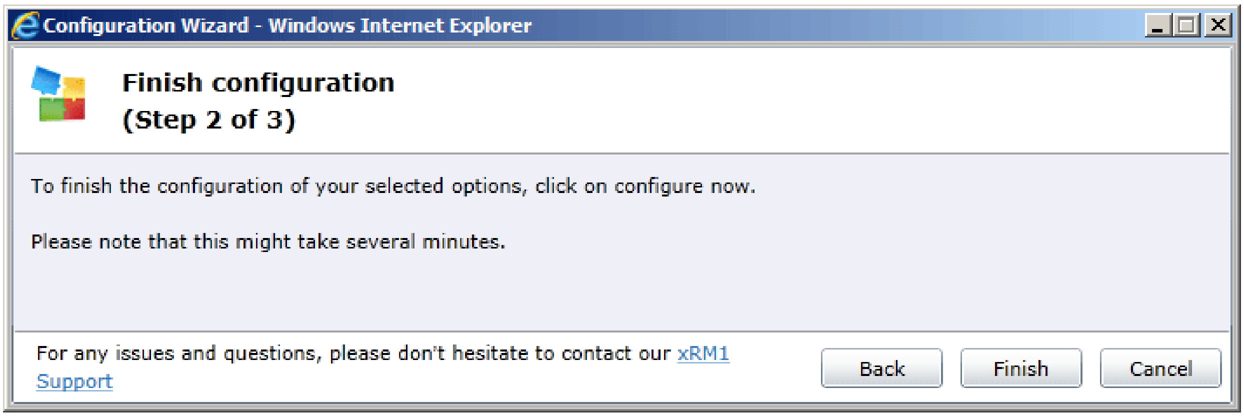
Note: Using the ***"Configuration Wizard"*** will not override any already existing data.



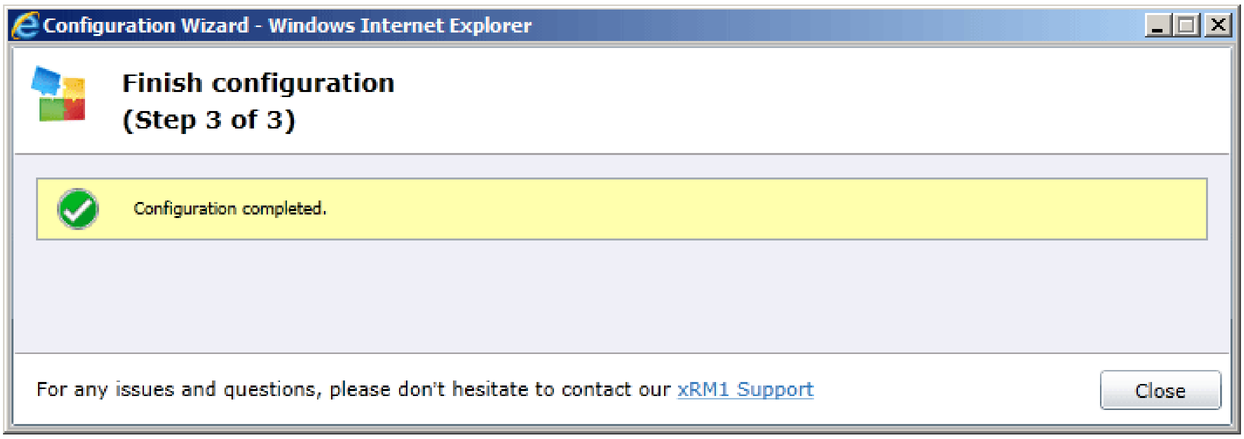
Here you have the option to select whether you would like to activate a free test version, a temporary or a permanent license. Instead, one begins directly with selecting basic settings and/or base data.



Then, confirm the selected configuration.



After the configuration is complete, the following window will appear:



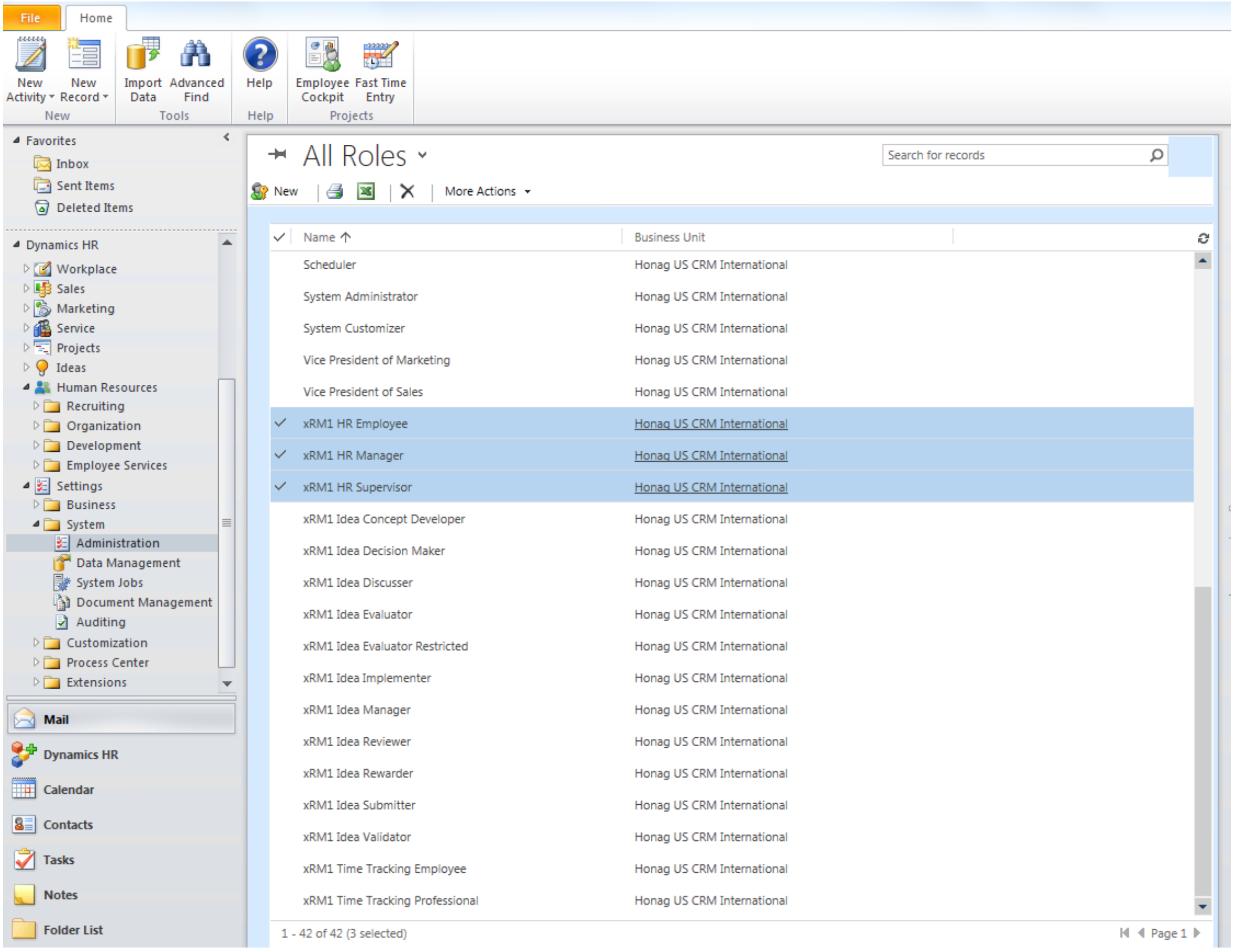
7.5 License management

For **"*xRM1 HR Management*"**, every user needs to have a valid license; this can be customized in each Microsoft Dynamics user. Assigning a license, the user gets the following security roles according to the following chart:

	xRM1 HR Management License Type			
Security Role	***Staff***	***Employee***	***Supervisor***	***HR Manager***
xRM1 HR Employee		X	X	X
xRM1 HR Supervisor			X	X
xRM1 HR Manager				X

7.6 Roles concept

"*xRM1 HR Management*" uses the standard rights and roles concept of Microsoft Dynamics. The settings in the roles are used as basic settings and can be configured further to the specific requirements of your organization. Please refer to the Microsoft Dynamics standard customization documentation for detailed information on configuring security roles.



7.7 xRM1 HR Management security roles

The following roles are available in the delivered configuration:

7.7.1 xRM1 HR Employee

All users who want to use employee services, expense tracking and see their personal development need this security role. It is included in all license types.

7.7.2 xRM1 HR Supervisor

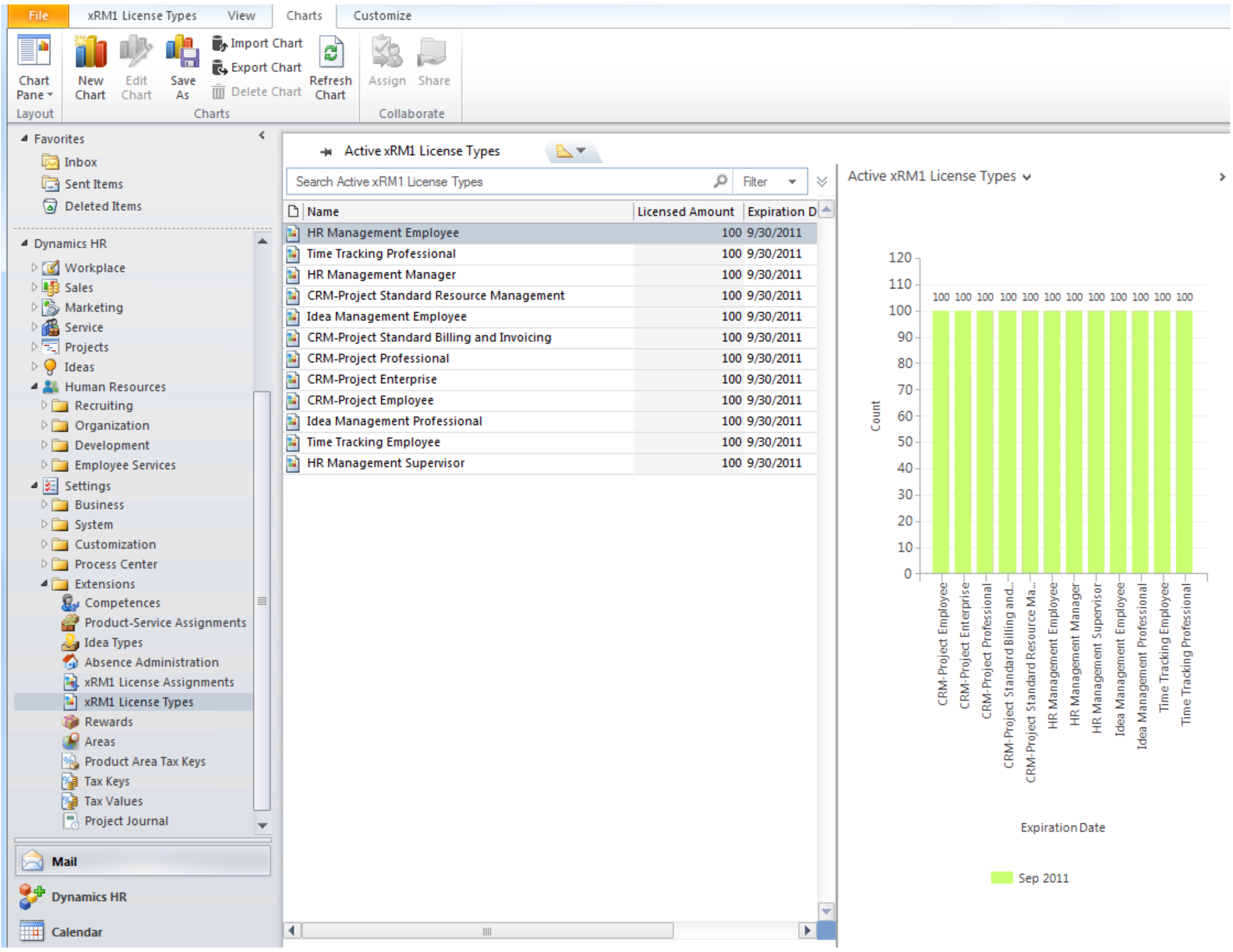
To be able to authorize leave and performance reviews, you need this security role. It's included in the license types ***"xRM1 HR Supervisor"*** and ***"xRM1 HR Manager"***.

7.7.3 xRM1 HR Manager

This role is necessary for full functionality. It is only included in the license type ***"xRM1 HR Manager"***.

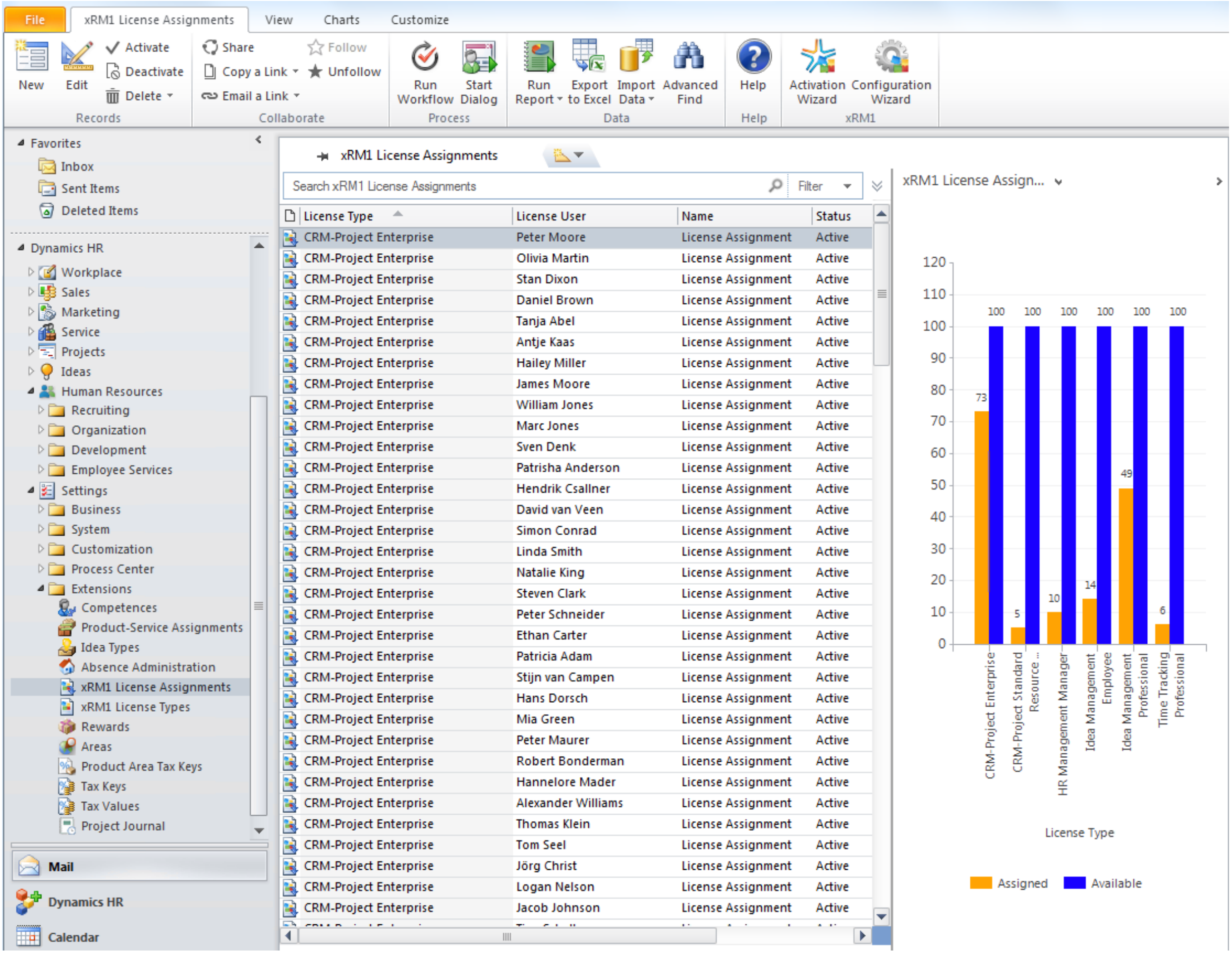
7.8 License types and license assignment

Under ***"Settings"*** → ***"xRM1 License types"***, you will find an overview of the existing license types as well as their corresponding validity dates.



File
xRM1 License Types
View
Charts
Customize
Chart Pane
New Chart
Edit Chart
Save As
Import Chart
Export Chart
Delete Chart
Refresh Chart
Assign
Share
Layout
Charts
Collaborate
Favorites
Inbox
Sent Items
Deleted Items
Dynamics HR
Workplace
Sales
Marketing
Service
Projects
Ideas
Human Resources
Recruiting
Organization
Development
Employee Services
Settings
Business
System
Customization
Process Center
Extensions
Competences
Product-Service Assignments
Idea Types
Absence Administration
xRM1 License Assignments
xRM1 License Types
Rewards
Areas
Product Area Tax Keys
Tax Keys
Tax Values
Project Journal
Mail
Dynamics HR
Calendar
Active xRM1 License Types
Search Active xRM1 License Types
Filter
Name
Licensed Amount
Expiration D
HR Management Employee 100 9/30/2011
Time Tracking Professional 100 9/30/2011
HR Management Manager 100 9/30/2011
CRM-Project Standard Resource Management 100 9/30/2011
Idea Management Employee 100 9/30/2011
CRM-Project Standard Billing and Invoicing 100 9/30/2011
CRM-Project Professional 100 9/30/2011
CRM-Project Enterprise 100 9/30/2011
CRM-Project Employee 100 9/30/2011
Idea Management Professional 100 9/30/2011
Time Tracking Employee 100 9/30/2011
HR Management Supervisor 100 9/30/2011
Active xRM1 License Types
Count
Expiration Date
Sep 2011

Under **"*Settings*" → "*xRM1 License Assignments*"**, you can find a list of the current license assignments.



In order to assign a license to a user, click on **"*Settings*" → "*xRM1 License Assignments*"** and then (in the ribbon bar) on **"*New*"**. In the open window, select the **"*License User*"** and **"*License type*"** which this user should have.

For the option **"*Assign Roles Automatically*"**, we recommend keeping the setting on **"*Yes*"**, as the user receives all security roles of the assigned license automatically. After clicking **"*Save & Close*"**, the user with the applicable license appears in the list of license assignments.