STORAGE OF DOCUMENTS

Although Microsoft Dynamics 365 for Talent provides the ability to store documents, the FourVision HR Document Web App expands the capabilities by enabling users to link documents to a profile. By linking a profile to a document, you can limit visibility to some employees, a group of employees, all employees, managers and the HR staff or any combination. All document types are supported to store including Word, PDF and JPG among others. This functionality provides secure, profile-based access to documents so that only the intended viewers have access to them.
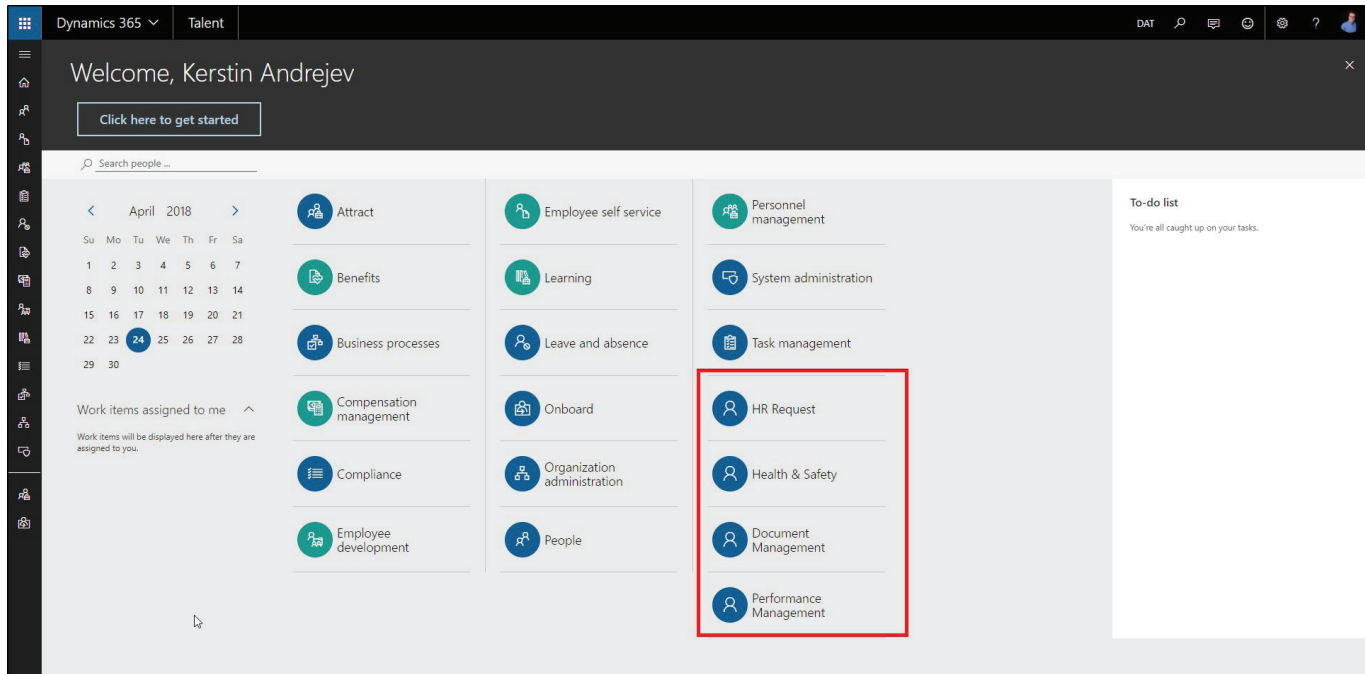

STORAGE CATEGORIES

Documents are indexed by categories, allowing like-documents to be linked by common characteristics that emulate an electronic filing cabinet. Documents can be stored in categories such as Insurance, Pension, Pay-slips, Contracts, Personal Information or Sickness among others.

STORAGE TIME PER DOCUMENT

The HR Document Management Web App allows you to set limits on how long a document should be stored in Microsoft Dynamics 365. you can determine the storage periods by document as well as schedule an expiry of that document. This can be done per legal entity as storage rules can differ per country.

Employees can access the HR Document Management app via the standard Microsoft Dynamics 365 workspaces.

CREATING HR DOCUMENTS

Creating documents in Microsoft Dynamics 365 is limited and requires the use of bookmarks. With the HR Document Management Web App you can easily design documents by dragging and dropping the relevant fields into a template. The template designer has a comprehensive list of available fields for creating a variety of documents. Once the template has been created, it can be made available to employees based on user profiles and accessible via the Employee Self Service site.

KEY TAKEAWAYS

· Store documents by category
· Expiration dates on stored documents
· Assign documents based on User profiles
· Easily create documents via dragging and dropping fields into a template

WWW.FOURVISION.COM

FourVision