**Course Outline**

**Introduction to Dynamics 365 for Talent and Initial Setup**

**Module 01: Introduction to Microsoft Dynamics 365 for Talent**

• Describe the Talent and Human resources experiences

• Navigate the Dynamics 365 for Talent application

• Discuss the feature sets and benefits of using the Talent experience

• Review the technology and integration with other Dynamics 365 applications

• Describe which data from the Talent experience is shared across companies and which is specific to a company

• Define parameters, such as identification types and number sequences

**Module 02: Security in Microsoft Dynamics 365 for Talent**

• Describe the features and terminology for security
• Create new users

• Configure role-based security

• Set up and use segregation of duties

**Module 03: System Administration in Microsoft Dynamics 365 for Talent**

• Set up and use batch processing

• Configure Dynamics 365 for Talent to send emails

• Set up system parameters

• Discuss personalization

**Module 04: Introduction to Organization Management in Microsoft Dynamics 365 for Talent**

• Distinguish between types of organization units
• Classify types of jobs
• Create a new job
• Create a new position
• Learn how various forms and list pages expand functionality of jobs, positions, and departments
• Report on jobs, positions and departments
• Enter addresses for workers

**Module 05: Introduction to Personnel Management in Microsoft Dynamics 365 for Talent**

• Understand worker and position data
• Explain the onboarding experience
• Understand loans and loan items
• Review human resource parameters, advanced access, and shared parameters
• Understand the uses of the setup pages
• Explain and demonstrate creating a position and a job
• Explain how to hire a new employee

**ATTRACT**

Develop a human resources strategy to attract, recruit, hire, and motivate employees:

**Module 06: Connect to LinkedIn and How to Use Sales Navigator**

• What is Linkedin Sales Navigator
• How to use Linkedin Sales Navigator
• Finding Candidates
• Screening

**Module 07: Recruiting Management in Microsoft Dynamics 365 for Talent**

• Learn about creating jobs
• Review how to add, view, screen, and reject candidates for jobs in the system
• Understand how to schedule and conduct interviews
• Walk through making job offers
• Walk through transitioning accepted offers to the Onboarding modular app

**Module 08: Job and Position Management in Microsoft Dynamics 365 for Talent**

• Explain jobs in Microsoft Dynamics 365 for Talent
• Walk through how to create jobs
• Cover how to work with job templates
• Define positions
• Utilize positions in the client
• Work with mass updates
• Explain how to enable a hiring freeze.
• Describe using position actions

**ONBOARD**

Develop and train employees:
Create and maintain benefits:

**Module 09: Onboarding Management with Microsoft Dynamics 365 for Talent**

• Explore the Onboard modular app
• Migrate and create new hires
• Create an introduction
• Create, add information to, and send a Welcome Guide
• Explore the Task management module in Dynamics 365 for Talent

**Module 10: Employee and Manager Self-Service with Microsoft D 365 for Talent**

• Describe how employees use Employee Self Service
• Describe how managers use Employee Self Service

**Module 11: Worker and Position Actions in Microsoft Dynamics 365 for Talent**

• Set up codes used to enter information about workers
• Enter new workers
• Assign workers to positions
• Assign workers to teams
• Set up union information
• Manage worker loans
• Print reports about workers

**Module 12: Compliance Management in Microsoft Dynamics 365 for Talent**

 Describe I-9 Verification
 Walkthrough I-9 code setup
 Demonstrate managing I-9 Data for an employee
 Utilize Work Environment Accommodations
 Cover the Physical Requirements for a Job
 Examine Accommodation Types
 Manage Accommodation Requests
 Review ADA Reports

**MANAGE AND THRIVE**

Maintain workplace safety and compliance:
Gather information using questionnaires:

**Module 13: Compensation Management in Microsoft Dynamics 365 for Talent**

• Understand compensation plans
• Review mandatory setup for compensation
• Review reference point setups
• Understand fixed and variable compensation plans and actions
• Review other compensation setup
• Review eligibility rules
• Discuss process events
• Understand updating compensation for employees

**Module 14: Benefit Management in Microsoft Dynamics 365 for Talent**

• Explore the Benefit management workspace
• Create benefit elements and benefits
• Define benefit eligibility rules
• Process the eligibility rules for the workers who can enroll in benefits
• Enroll a worker and any dependents in a benefit
• Maintain dependents and beneficiaries
• Review mass benefit enrollment and expiration
• Review benefit rate updates

**Module 15: Benefit Management in Microsoft Dynamics 365 for Talent**

• Explore the Benefit management workspace
• Create benefit elements and benefits
• Define benefit eligibility rules
• Process the eligibility rules for the workers who can enroll in benefits
• Enroll a worker and any dependents in a benefit
• Maintain dependents and beneficiaries
• Review mass benefit enrollment and expiration
• Review benefit rate updates

**Module 16: Performance Management in Microsoft Dynamics 365 for Talent**

• Describe performance journals
• Review goals and their categories, templates, and groups
• Discuss reviews and their types, and templates
• Cover the setup necessary for competencies
• Explain the various skill analyses

**Module 17: People Analytics with Microsoft Dynamics 365 for Talent**

• Understand people searches
• Review direct reports
• Review direct deposit and contact setup
• Explain certificates
• Understand courses

**Module 18: Learning Management in Microsoft Dynamics 365 for Talent**

• Describe the basic components in the course management structure
• Explain training setup, including classrooms and agendas
• Discuss questionnaires, including how to design, send, and complete them
• Explain training reports, including statistics and generating reports

Module 19: Leave and Absence Management in Microsoft Dynamics 365 for Talent
• Explain leave and absence administration and processes
• Understand absence and leave transactions and time off requests
• Explore leave types and leave plans
• Understand the setup for enrolling workers in leave and absence plans

**CUSTOMIZE AND EXTEND**

**Module 20: Integration Framework in Microsoft Dynamics 365 for Talent**

• Provide an overview of the integration framework
• Discuss Power Apps
• Discuss Azure functions
• Explore how to configure Dynamics 365 for Talent
• Discuss data management

**Module 21: Business Process Flows with Microsoft Dynamics 365 for Talent**

• Flow and PowerApps
• Describe business process
• Cover creating tasks
• Walkthrough creating a business process template
• Configure calendars for business processes
• Discuss how to start a business process
• Review task statuses
• Explain how to reassign business processes
• Discuss changing the status of a business process