**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