

eXperts People 365 For MS Dynamics 365



Contents

1. Introduction	2
2. Core HR	3
2.1. Organization Structure:.....	3
2.2. Personnel Management	4
2.3. Recruitment Management	5
2.5. Performance Appraisal and Cascading KPIs	7
2.6. Succession Planning:	9
3. Time and Attendance Integration	11
4. Power BI – Dashboards.....	13
5. Self Service Portal	14
5.1. Employee Self Service Portal.....	14
5.2. Manager Self Service Portal.....	18
6. Payroll Management.....	19
6.1. Workflows	19
6.2. Employees Benefits Accruals	20
6.3. Payroll Setup	20
6.4. Payroll Process.....	20
6.5. Loans & Advances	21
6.6. End of Service.....	22

1. Introduction

People Management, the new terminology for HR management, is currently occupying a magnificent space in the modern business, as the workforce is considered as one of the most valuable assets in your organization, which needs to be treated as an extensive tool.

Managing People in your organization directs you to search for the Best and Most Practical tools to control all the processes in Employee lifecycle, From Hire to Retire: Payroll, However, might be insufficient and leads to several manual entries if you are not using the suitable tool for this Job.

Business Experts Gulf, with the experience of over 100 clients globally, have intensively worked to establish the doctrine of a Parametrized Payroll Module, Experts People 365, Completing the full image of ERP, Raising your D365 F&O platform to the maximum level of Flexibility and Integration. The solution is available as an ISV based on Microsoft Dynamics 365 F&O with real-time financial integrations for Gulf (UAE), Kenya, and Yemen, and other countries.

Key Features of eXperts People 365:

- Employee Self Service Portal
- Core HR
- Payroll
- Power BI – Dashboards
- Mobile App Enabled
- Time and Attendance Integration



2. Core HR

Human resources streamline many routine recordkeeping tasks and automates several processes related to staffing your organization. It also provides a framework for human resources staff to manage areas of oversight. These areas include employee recruitment and retention, benefits administration, training, performance reviews, and change management.

Features Includes:

- Organization Structure.
- Recruitment Management.
- Performance Appraisals.
- Course management and Talent Development and Acquisition.
- Succession Planning.

2.1. Organization Structure:

Planning organization hierarchy is a vital step for an ERP implementation to define how organization should be structured and controlled. Organizational hierarchies represent the relationships between the organizations that make up a business.

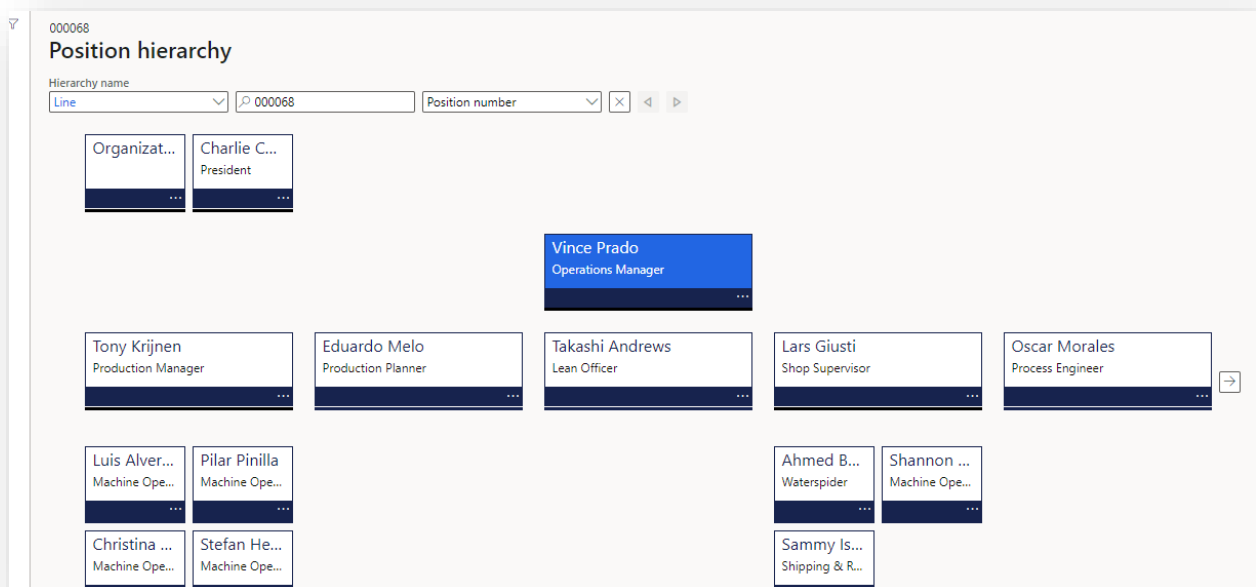


Figure 1 - Organization Structure

2.2. Personnel Management

Empower your HR system with the Comprehensive Personnel Management module, presented by an easy-to-use Personnel management workspace, to access the most used tables and records efficiently and effectively.

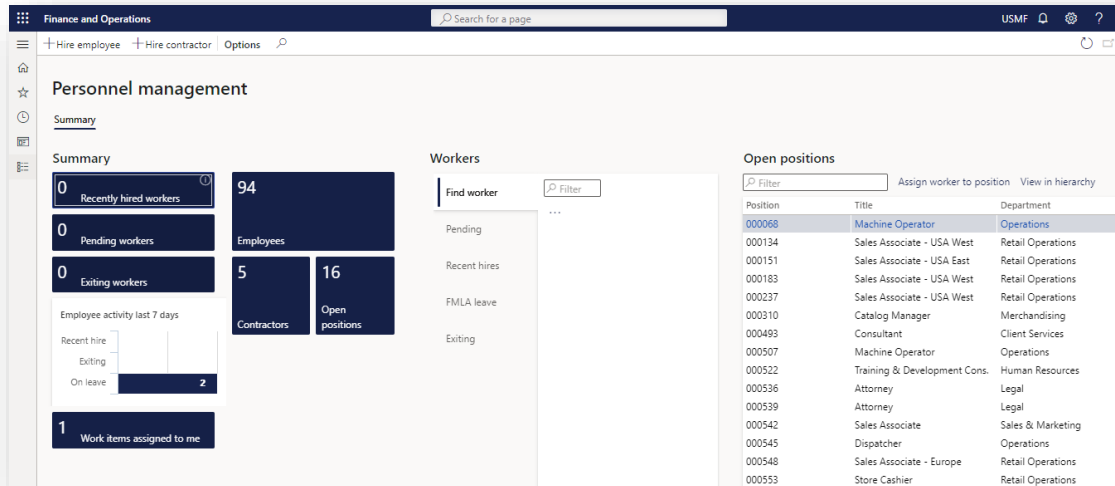
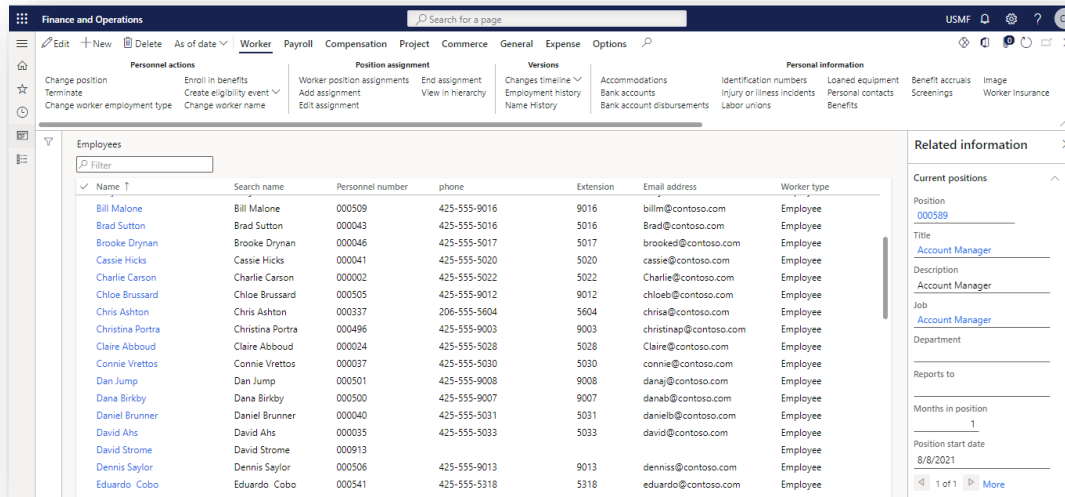


Figure 2 -Personnel Management

With eXperts People 365, you can maintain a wide range of employee information, related to personal information, employment information, compensation and competencies, legal documents, previous experience, along with the option to upload unlimited number of documents and files.



Name	Search name	Personnel number	phone	Extension	Email address	Worker type
Bill Malone	Bill Malone	000509	425-555-9016	9016	billm@contoso.com	Employee
Brad Sutton	Brad Sutton	000043	425-555-5016	5016	Brad@contoso.com	Employee
Brooke Drynan	Brooke Drynan	000046	425-555-5017	5017	brooked@contoso.com	Employee
Cassie Hicks	Cassie Hicks	000041	425-555-5020	5020	cassie@contoso.com	Employee
Charlie Carson	Charlie Carson	000002	425-555-5022	5022	Charlie@contoso.com	Employee
Chloe Brussard	Chloe Brussard	000505	425-555-9012	9012	chloe@contoso.com	Employee
Chris Ashton	Chris Ashton	000337	206-555-5604	5604	chrisa@contoso.com	Employee
Christina Portra	Christina Portra	000496	425-555-9003	9003	christinap@contoso.com	Employee
Claire Abboud	Claire Abboud	000024	425-555-5028	5028	Claire@contoso.com	Employee
Connie Vrettos	Connie Vrettos	000037	425-555-5030	5030	connie@contoso.com	Employee
Dan Jump	Dan Jump	000501	425-555-9008	9008	danaj@contoso.com	Employee
Dana Birkby	Dana Birkby	000500	425-555-9007	9007	danab@contoso.com	Employee
Daniel Brunner	Daniel Brunner	000040	425-555-5031	5031	danielb@contoso.com	Employee
David Ahs	David Ahs	000035	425-555-5033	5033	david@contoso.com	Employee
David Strome	David Strome	000913				Employee
Dennis Saylor	Dennis Saylor	000506	425-555-9013	9013	denniss@contoso.com	Employee
Eduardo Cobo	Eduardo Cobo	000541	425-555-5318	5318	eduardo@contoso.com	Employee

Figure 3 -Employee Master

2.3. Recruitment Management

Recruitment projects manage the content used in advertisements for open positions and can help you manage applications for job openings. You can use them to track responses to job postings for a specific recruitment project, or specific applicants, and update the status of open positions. You can also hire single applicants or manage "mass hire projects," that facilitate hiring multiple workers, for example, to meet seasonal business needs.

- Manage Recruitment Processes.
- Mass Hiring Projects.

After you've hired staff, you can set up plans to manage compensation effectively and equitably, as well as manage items, such as computers or phones, that your organization lends to its employees. You can create fixed and variable compensation plans, as well as define rules that apply the compensation plan to meet the criteria for that plan.

- Compensation plans
- Create fixed compensation plans
- Create variable compensation plans

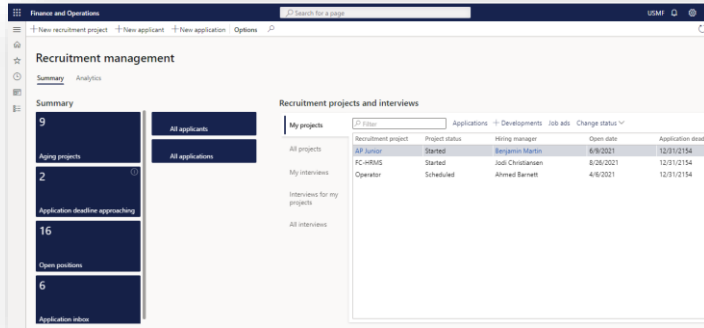


Figure 4- Recruitment Workspace

2.4. Course management and Talent Development and Acquisition.

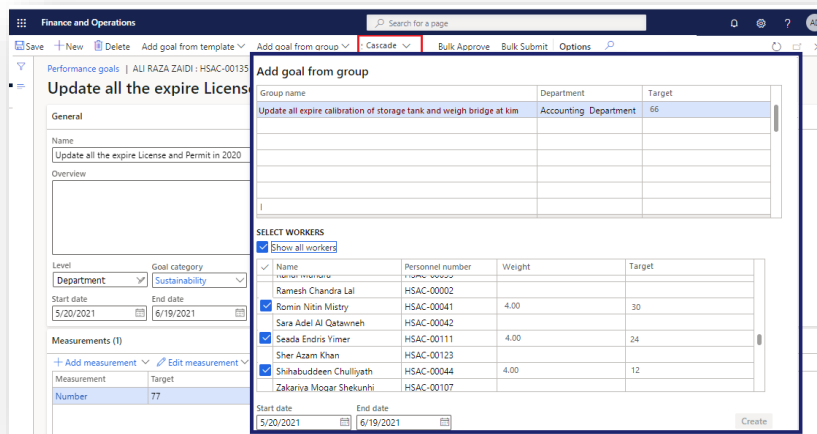
To help your employees reach their career objectives while delivering critical business needs you can set up goals, create performance reviews and track feedback. To help employees develop needed skills, you can also set up instructors, course types, courses, course descriptions, agendas, tracks, and sessions before you assign an instructor to a course, or register someone for a course. Instructors must already exist as workers, applicants, or contacts.

- Performance management
- Align workforce skills and business needs
- Administer training through courses

2.5. Performance Appraisal and Cascading KPIs

As you work with Human resources, you'll decide how to structure your organization, using elements, such as departments, jobs, and positions. These are among the foundational elements that you'll configure in Human resources. Individual employees are assigned to positions which are associated with jobs.

You can also define the Company Goals, and cascade these goals to Departments, then to Team and individual levels, so these Goals will be assessed and monitored through the performance review process.



Add goal from group

Group name	Department	Target
Update all the expire License	Accounting Department	66

SELECT WORKERS

Name	Personnel number	Weight	Target
Ramesh Chandra Lal	HSAC-00002		
Romin Nitin Misty	HSAC-00041	4.00	30
Sara Adel Al Qatameh	HSAC-00042		
Saad Endris Yimer	HSAC-00111	4.00	24
Sher Azam Khan	HSAC-00123		
Shihabuddeen Chulliyath	HSAC-00044	4.00	12
Zakariya Moqar Shelunhi	HSAC-00107		

Start date: 5/20/2021 End date: 6/19/2021

Create

Figure 5 - KPIs Cascading

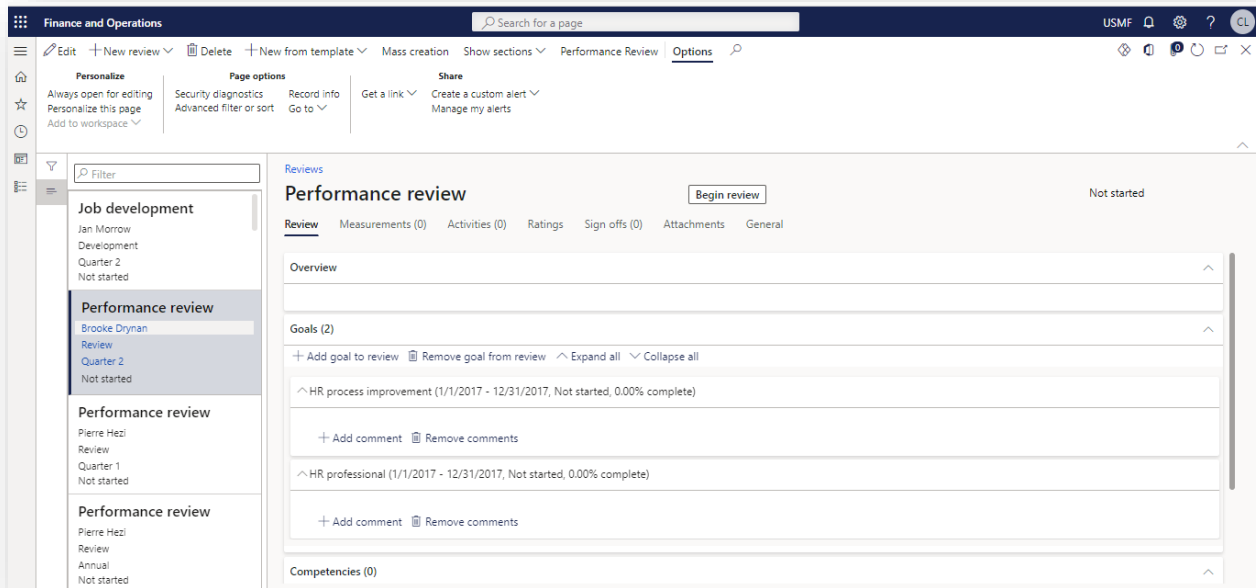
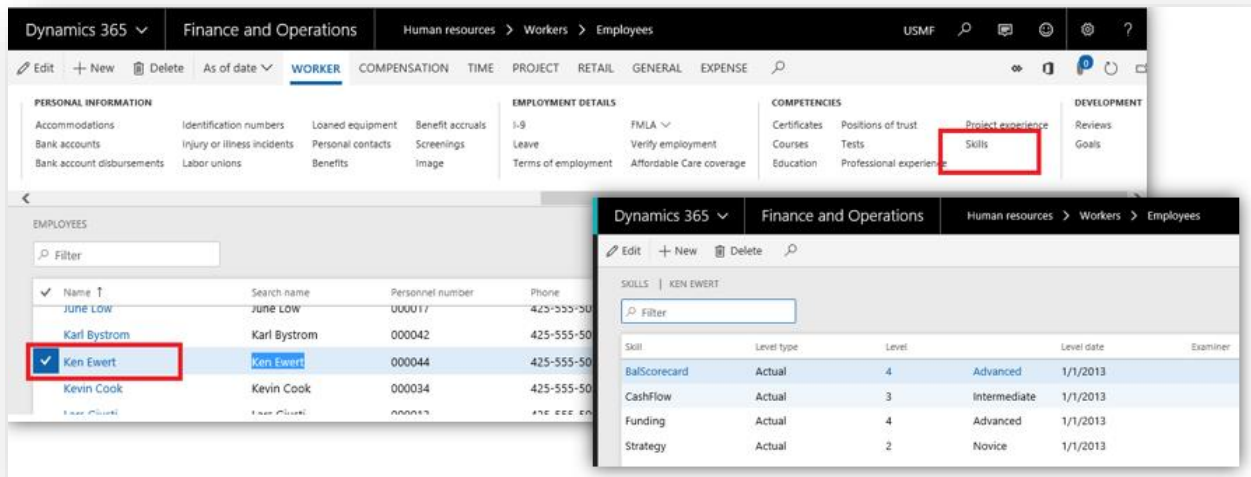


Figure 6 -Performance Reviews

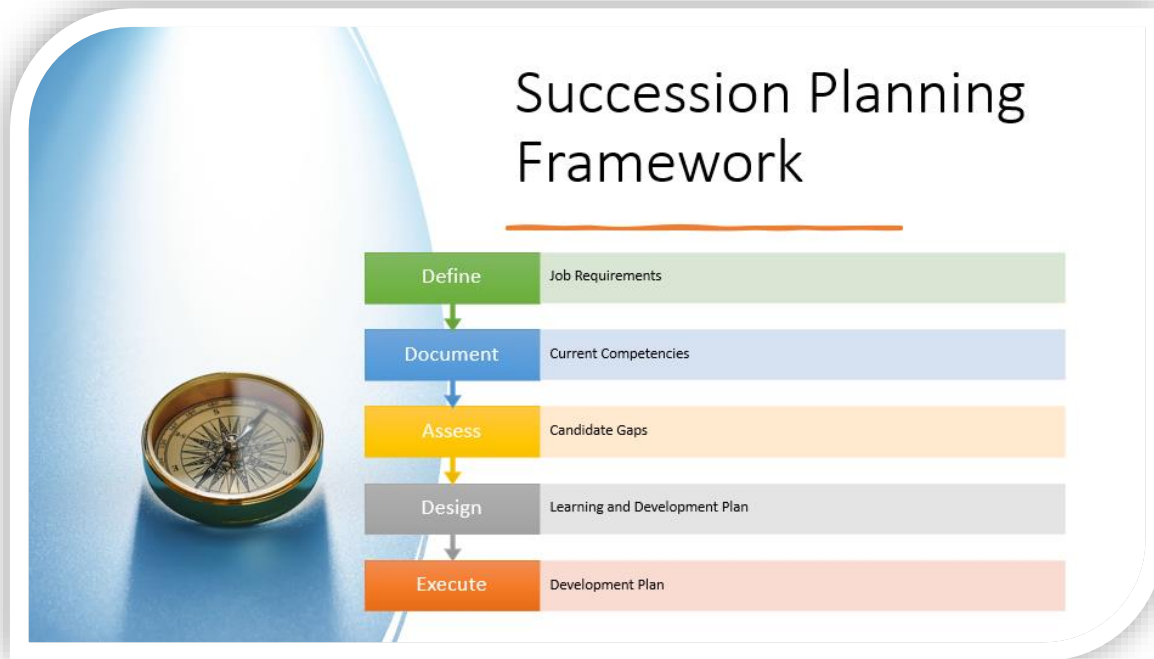


Name	Search name	Personnel number	Phone
June Low	June Low	000017	425-555-50
Karl Bystrom	Karl Bystrom	000042	425-555-50
Ken Ewert	Ken Ewert	000044	425-555-50
Kevin Cook	Kevin Cook	000034	425-555-50

Skill	Level type	Level	Level date	Examiner
BalScorecard	Actual	4	Advanced	1/1/2013
CashFlow	Actual	3	Intermediate	1/1/2013
Funding	Actual	4	Advanced	1/1/2013
Strategy	Actual	2	Novice	1/1/2013

Figure 7 -Employee Competencies

2.6. Succession Planning:



Finance and Operations

Search for a page

USMF

Save + New review Delete + New from template Show sections Performance Review Options Update Gap Analysis

Personalize Always open for editing Personalize this page Page options Security diagnostics Record info Go to Edit Revert Get a link Create a custom alert Manage my alerts Share

Filter

Appraisal interview Appraisal Annual Ready for review

Job development Development Mid year In progress

Reviews | CLAIRE ABBOD : 000024

Job development

Review Activities (2) General

Job Payroll Administrator Description Payroll Administrator In progress

Your development plan is an ongoing document to help you improve your skills and track your progress towards your goals.

Goals (3)

+ Add goal to review Remove goal from review Expand all Collapse all

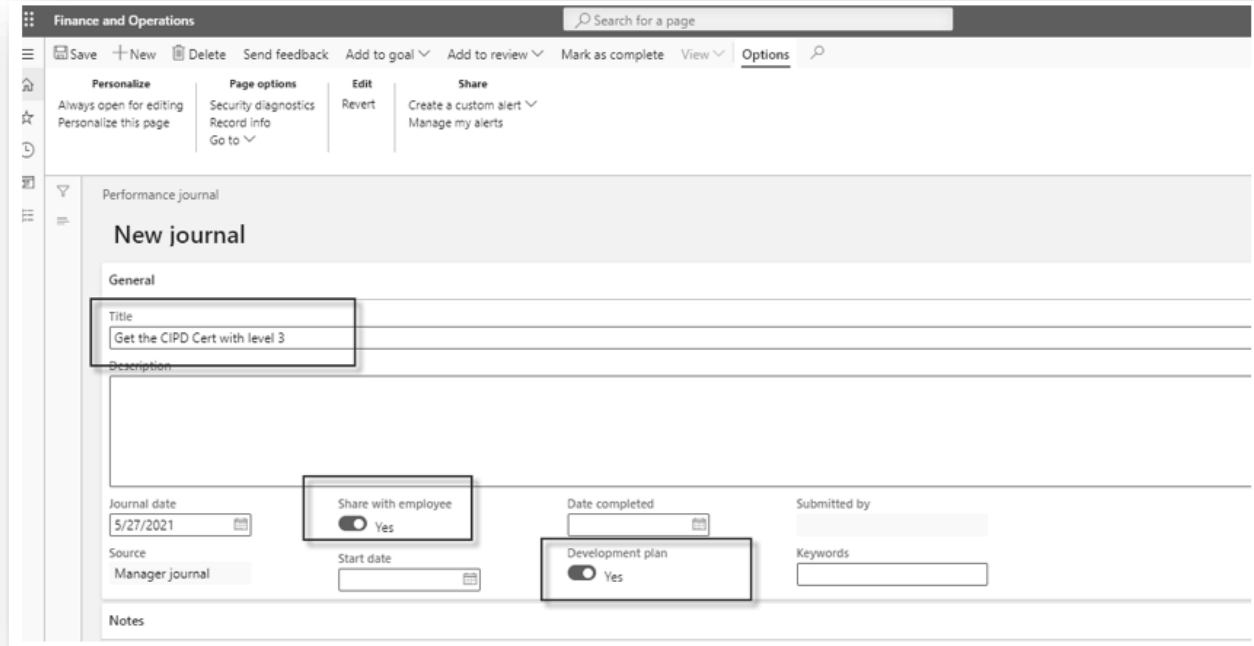
- Dynamics certification (1/1/2020 - 6/30/2020, On track, 0.00% complete)
- Ethics course (1/1/2020 - 6/30/2020, Not started, 0.00% complete)
- Sales methodology (1/1/2020 - 12/31/2020, On track, 0.00% complete)

Competencies (1)

+ Add competency Edit competency Remove competencies Expand all Collapse all

- Increase your customer skills

Figure 8 -Employee <> Job Gap Analysis



Finance and Operations Search for a page

Save + New Delete Send feedback Add to goal Add to review Mark as complete View Options

Personalize Always open for editing Personalize this page

Page options Security diagnostics Record info Go to

Edit Revert

Share Create a custom alert Manage my alerts

Performance journal

New journal

General

Title
Get the CIPD Cert with level 3

Description

Journal date
5/27/2021

Source
Manager journal

Share with employee
☒ Yes

Start date

Date completed

Development plan
☒ Yes

Submitted by

Keywords

Notes

Figure 9 -Development Plan

eXperts People 365 comes also with a standard feature for Projects Cost Allocation Functionality, that reads the time entry for employees from multiple Timesheet Sources of information, and then Gives the option to a “Project Allocation Manager” to select the **cost allocation type** of the time entry for each employee, which will define the percentages of Salaries Cost Allocation in the General Ledger, based on a predefined setup for Cost Category Percentages.

The following diagram illustrates the flow of this process.

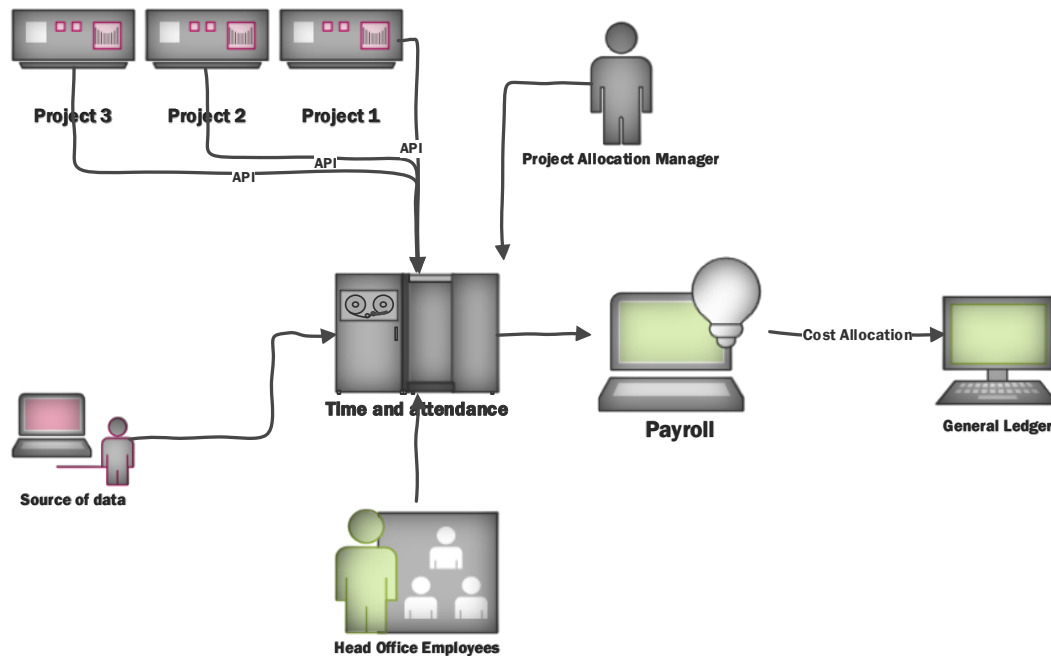


Figure 12 Project Cost Allocation Chart

In eXperts People 365, all the TimeSheet entries from different sources will be inserted in the Time and attendance table, with the option to select the “Cost Allocation type”.

Time Attendance

My view ▼

Filter

Personnel number	Trans Date	Employment	Shift Name	Time In	Time Out	Net Hours	Project Allocation type	Remarks	Attendance status	Extra Hours	Short H
0001	1/1/2020	EMC	Standard	8:00 AM	4:00 PM	08:00:00	Stnd Allocation	Entry On Time - Exit On Time - None	Ok	00:00:00	00:00:00
0001	1/2/2020	EMC	Standard	8:00 AM	4:00 PM	08:00:00	Allocation 2	Entry On Time - Exit On Time - None	Ok	00:00:00	00:00:00
0001	1/5/2020	EMC	Standard	8:00 AM	4:00 PM	08:00:00	Allocation 2	Entry On Time - Exit On Time - None	Ok	00:00:00	00:00:00
0001	1/6/2020	EMC	Standard	8:00 AM	4:00 PM	08:00:00	Stnd Allocation	Entry On Time - Exit On Time - None	Ok	00:00:00	00:00:00
0001	1/7/2020	EMC	Standard	8:00 AM	4:00 PM	08:00:00	Stnd Allocation	Entry On Time - Exit On Time - None	Ok	00:00:00	00:00:00
0001	1/8/2020	EMC	Standard	8:00 AM	4:00 PM	08:00:00	Stnd Allocation	Entry On Time - Exit On Time - None	Ok	00:00:00	00:00:00
0001	1/9/2020	EMC	Standard	8:00 AM	4:00 PM	08:00:00	Stnd Allocation	Entry On Time - Exit On Time - None	Ok	00:00:00	00:00:00
0001	1/12/2020	EMC	Standard	8:00 AM	4:00 PM	08:00:00	Stnd Allocation	Entry On Time - Exit On Time - None	Ok	00:00:00	00:00:00
0001	1/13/2020	EMC	Standard	8:00 AM	4:00 PM	08:00:00	Stnd Allocation	Entry On Time - Exit On Time - None	Ok	00:00:00	00:00:00
0001	1/16/2020	EMC	Standard	8:00 AM	4:00 PM	08:00:00	Stnd Allocation	Entry On Time - Exit On Time - None	Ok	00:00:00	00:00:00
0001	1/19/2020	EMC	Standard	8:00 AM	4:00 PM	08:00:00	Allocation 2	Entry On Time - Exit On Time - None	Ok	00:00:00	00:00:00
0001	1/20/2020	EMC	Standard	8:00 AM	6:00 PM	00:00:00	- -	- -	Record Missing	00:00:00	00:00:00
0001	1/21/2020	EMC	Standard	8:00 AM	4:00 PM	08:00:00	Allocation 2	Entry On Time - Exit On Time - None	Ok	00:00:00	00:00:00
0001	1/22/2020	EMC	Standard	8:00 AM	4:00 PM	08:00:00	Allocation 2	Entry On Time - Exit On Time - None	Ok	00:00:00	00:00:00

Figure 13 - Projects Time And Attendance

4. Power BI – Dashboards

“Bridge the gap between data and decision making”.

- Create amazing data experiences
- Make decisions with confidence
- Optimize your business intelligence with trusted Microsoft technologies

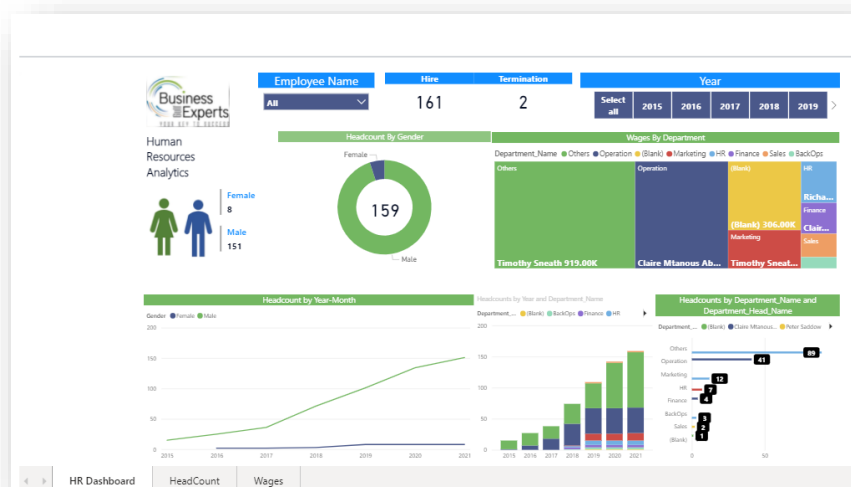


Figure 14 -Power BI 1



Figure 15 -Power BI 2

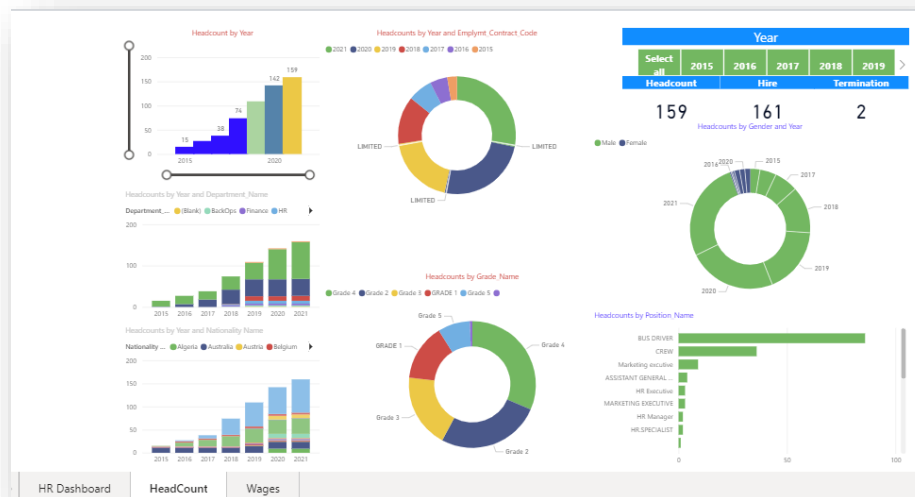


Figure 16 -Power BI 3

5. Self Service Portal

5.1. Employee Self Service Portal

In eXperts People 365, a comprehensive self-service portal is imbedded and available to all employees and managers. Employees can now participate in entering their own records in the HR

system from their access, such as Attendance, Roasters, leaves, loan requests, allowance requests, HR letters request. They can even update their own information like Contact information, addresses, and Family contacts. All these tasks can be performed without having to go through the HR department. Employees can also check their remaining leave days and print out their pay slip.

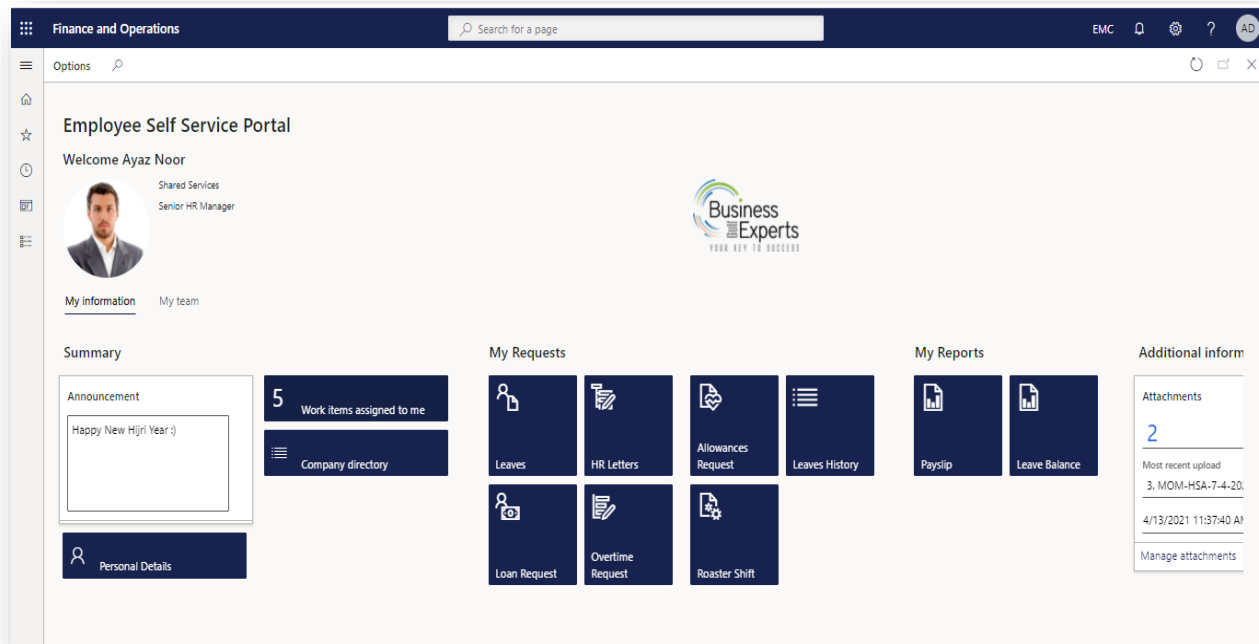


Figure 17 -Employee Self Service Landing Page

COMPANY

LOGO

Pay Slip for Pay Period

July 2020

Date Generated

10/6/2020

Period Start Date

7/1/2020

Period End Date

7/31/2020

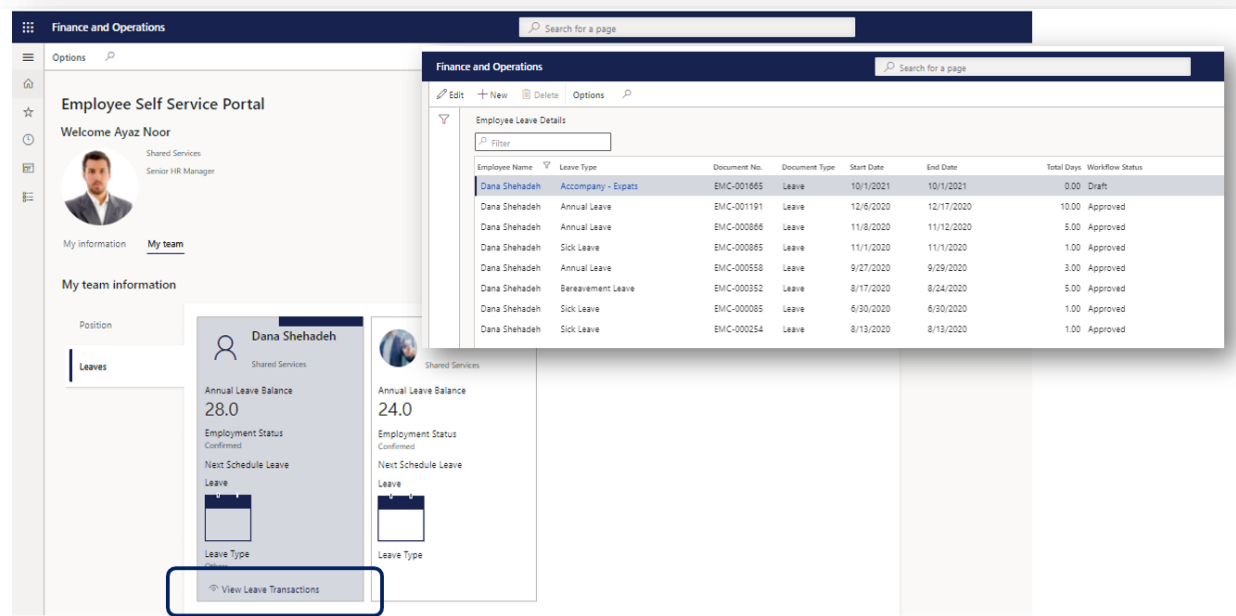
6:01 PM

Employee Number	0116	Employee Name	Claire Abboud	
Designation	Functional Consultant	Joining Date	2/12/2013	
Department	Technical	Payment Method	WPS	
Days Worked	31.00	Currency	AED	
DEDUCTIONS				
EARNINGS		Code Name	Accounting Currency Amt	
	Actual	Payable	Salary Deduction	(800.00)
Basic salary	4,000.00	4,000.00		
Housing Allowance	2,500.00	2,500.00		
Transportation Allowance	1,000.00	1,000.00		
Utilities Allowance	500.00	500.00		
Total Earnings	8,000.00	8,000.00	Total Deductions	(800.00)
			Net Amount Paid	7,200.00
ADVANCE LEAVE DETAILS				
Opening Leave Balance			11	
Leave Used			11	
Accrued Leave			1.83	
Closing Balance			12.84	
DEDUCTION DETAILS				
Loan Amount	Monthly Installment	Installments Paid	Balance Payable	
0.00	0.00	0.00	0.00	
OVERTIME DETAILS				
Overtime Days			Overtime Amount	
0			0.00	

Figure 20 -Pay slip

5.2. Manager Self Service Portal

eXperts People 365 also offers Manager Self-Services (MSS). Managers can perform their management tasks conveniently, enquire about all administrative information of their team members, initiate and monitor the team's performance, Also they can enquire about their team's leave information in a user friendly interfaces. They can always work in a reliable, original Microsoft App, Microsoft Outlook or any favorite browser.



The screenshot displays the 'Employee Self Service Portal' for a manager named Ayaz Noor. The interface includes a sidebar with navigation options like 'My Information' and 'My team'. The main content area shows 'My team information' for Dana Shehadeh, including her annual leave balance (28.0) and employment status (Confirmed). A table titled 'Employee Leave Details' lists various leave types and their durations. A 'View Leave Transactions' button is highlighted at the bottom.

Employee Name	Leave Type	Document No.	Document Type	Start Date	End Date	Total Days	Workflow Status
Dana Shehadeh	Accompany - Expats	BMC-001665	Leave	10/1/2021	10/1/2021	0.00	Draft
Dana Shehadeh	Annual Leave	BMC-001191	Leave	12/5/2020	12/17/2020	10.00	Approved
Dana Shehadeh	Annual Leave	BMC-000866	Leave	11/8/2020	11/12/2020	5.00	Approved
Dana Shehadeh	Sick Leave	BMC-000865	Leave	11/1/2020	11/1/2020	1.00	Approved
Dana Shehadeh	Annual Leave	BMC-000558	Leave	9/27/2020	9/29/2020	3.00	Approved
Dana Shehadeh	Bereavement Leave	BMC-000352	Leave	8/17/2020	8/24/2020	5.00	Approved
Dana Shehadeh	Sick Leave	BMC-000085	Leave	6/30/2020	6/30/2020	1.00	Approved
Dana Shehadeh	Sick Leave	BMC-000254	Leave	8/13/2020	8/13/2020	1.00	Approved

Figure 21 -Manager Self Service

6. Payroll Management



eXperts People 365 helps you to create a comprehensive Payroll System that covers Benefits and deductions rules and assignments at employee type (Local or Expat), along with Bonus distribution mechanism based on grades and score of reviews. eXperts People also provides End of service calculations for locals and expats, along with Insurance for employee and family based on the grade.

Manage Employee advances/ Loan management based on pre-agreed schedule for deductions through Manual variable allowances and deductions in pay run.

Payroll reports play a major role in Payroll Processing to support users in generating different document formats for the most used reports, such as pay slip, Pay sheet, Payroll comparison report, Sif file, Bank reports, EOS reports, and other reports.

6.1. Workflows

- Advance/Loan request

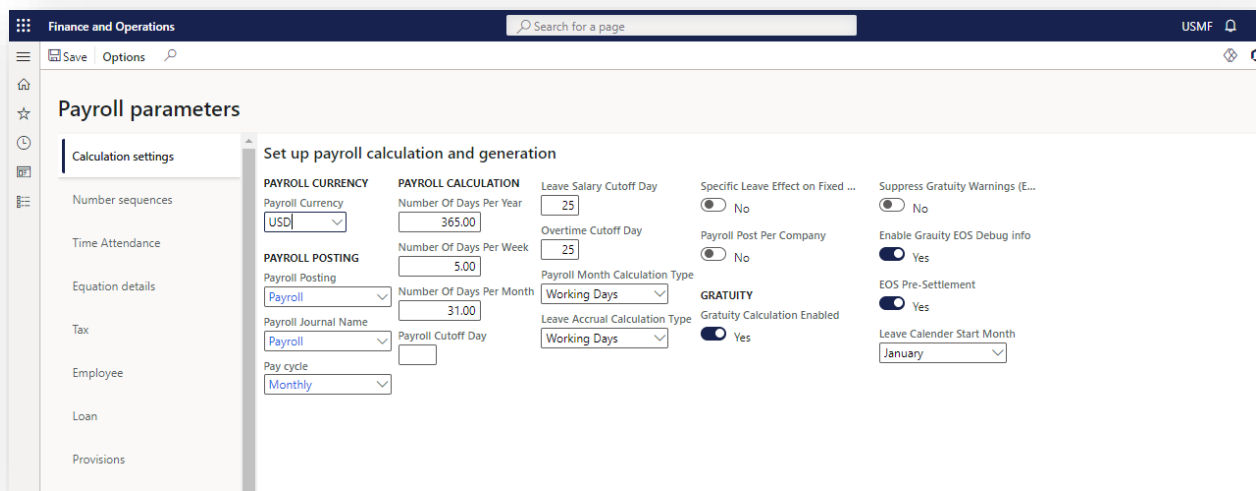
- Employee contracts
- Leave requests & Leave Resumption
- Allowances / Expense requests.
- End of service final settlement
- HR letters and NOCs

6.2. Employees Benefits Accruals

- Air Tickets:
- Leaves
- Gratuity

6.3. Payroll Setup

- Unlimited Earnings and Deductions
- Set of Earning/Deduction codes linked to employees
- Definition of Calendars, Payroll periods
- Specific general ledger account linked to each type of payroll expense
- Definition of various Overtime, Absence and benefit pay elements
- Provision for additional monthly inputs
- Bonus Payroll



The screenshot shows the 'Payroll parameters' configuration window. The left sidebar lists various settings: Calculation settings (selected), Number sequences, Time Attendance, Equation details, Tax, Employee, Loan, and Provisions. The main area is titled 'Set up payroll calculation and generation' and contains several sections:

- PAYROLL CURRENCY:** Payroll Currency is set to 'USD'.
- PAYROLL CALCULATION:** Number Of Days Per Year is 365.00, Number Of Days Per Week is 5.00, and Number Of Days Per Month is 31.00.
- PAYROLL POSTING:** Payroll Posting is set to 'Payroll', Payroll Journal Name is 'Payroll', and Pay cycle is 'Monthly'.
- Leave Salary Cutoff Day:** Set to 25.
- Overtime Cutoff Day:** Set to 25.
- Specific Leave Effect on Fixed ...:** Set to 'No'.
- Payroll Post Per Company:** Set to 'No'.
- Suppression of Gratuity Warnings (E...):** Set to 'No'.
- Enable Grauity EOS Debug info:** Set to 'Yes'.
- EOS Pre-Settlement:** Set to 'Yes'.
- Leave Calendar Start Month:** Set to 'January'.
- GRATUITY:** Gratuity Calculation Enabled is set to 'Yes'.
- Payroll Month Calculation Type:** Set to 'Working Days'.
- Leave Accrual Calculation Type:** Set to 'Working Days'.

Figure 22 -Payroll Parameters

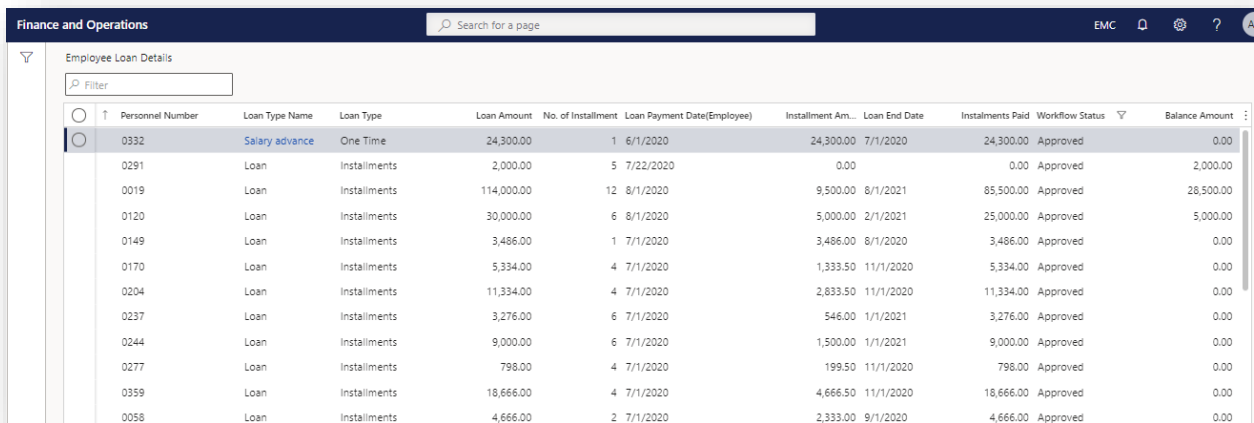
6.4. Payroll Process

- Processing of payroll for different periods, based on class of employee.
- Integration of Time and Attendance records with payroll for every month
- History of monthly payroll runs for a pre-defined period to be maintained.

- Facility to include/exclude contractors or any other employees for a payroll run.
- Mode of payment for salaries: Electronic bank transfers and WPS.
- Retro Pay Processing: Manage previous months' salary adjustments into current payroll in Payroll Journals.
- Support of Social Security calculations.
- Pay slip generation for all employees.
- Leave salary processing before an employee goes on leave.
- Payroll Posting to GL.

6.5. Loans & Advances

- Loans are processed when an employee requests for a loan.
- Multiple loans for a single employee can be handled, with flexible validations as per requirements.
- Loan payments (Installments) are processed automatically through the payroll at the end of each pay period.
- Employee Loan installments and Repayment schedule/reschedule reports available
- Advances taken by employees are also processed.
- An Option to pay the Loan through the Payroll or a cheque.

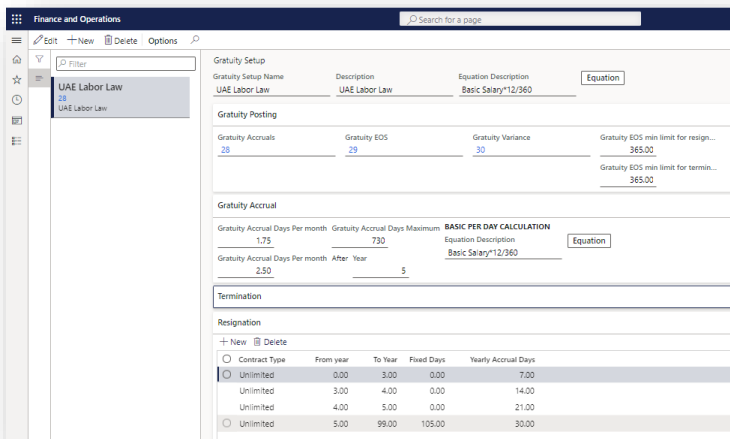


Personnel Number	Loan Type Name	Loan Type	Loan Amount	No. of Installment	Loan Payment Date(Employee)	Installment Am...	Loan End Date	Installments Paid	Workflow Status	Balance Amount
0332	Salary advance	One Time	24,300.00	1	6/1/2020	24,300.00	7/1/2020	24,300.00	Approved	0.00
0291	Loan	Installments	2,000.00	5	7/22/2020	0.00		0.00	Approved	2,000.00
0019	Loan	Installments	114,000.00	12	8/1/2020	9,500.00	8/1/2021	85,500.00	Approved	28,500.00
0120	Loan	Installments	30,000.00	6	8/1/2020	5,000.00	2/1/2021	25,000.00	Approved	5,000.00
0149	Loan	Installments	3,486.00	1	7/1/2020	3,486.00	8/1/2020	3,486.00	Approved	0.00
0170	Loan	Installments	5,334.00	4	7/1/2020	1,333.50	11/1/2020	5,334.00	Approved	0.00
0204	Loan	Installments	11,334.00	4	7/1/2020	2,833.50	11/1/2020	11,334.00	Approved	0.00
0237	Loan	Installments	3,276.00	6	7/1/2020	546.00	1/1/2021	3,276.00	Approved	0.00
0244	Loan	Installments	9,000.00	6	7/1/2020	1,500.00	1/1/2021	9,000.00	Approved	0.00
0277	Loan	Installments	798.00	4	7/1/2020	199.50	11/1/2020	798.00	Approved	0.00
0359	Loan	Installments	18,666.00	4	7/1/2020	4,666.50	11/1/2020	18,666.00	Approved	0.00
0058	Loan	Installments	4,666.00	2	7/1/2020	2,333.00	9/1/2020	4,666.00	Approved	0.00

Figure 23 -Loans and Advances

6.6. End of Service

- End of service Form to show final settlement.
- Slab-based End of service based on the number of service years.
- Auto-recover for the paid benefits and pending loan installments.
- A configurable Approval Workflow for the al settlement form.



Finance and Operations Search for a page

Gratuity Setup

Gratuity Setup Name	Description	Equation Description	Equation
UAE Labor Law	UAE Labor Law	Basic Salary*12/360	

Gratuity Posting

Gratuity Accruals	Gratuity EOS	Gratuity Variance	Gratuity EOS min limit for resign...
28	29	30	365.00
			Gratuity EOS min limit for termin...
			365.00

Gratuity Accrual

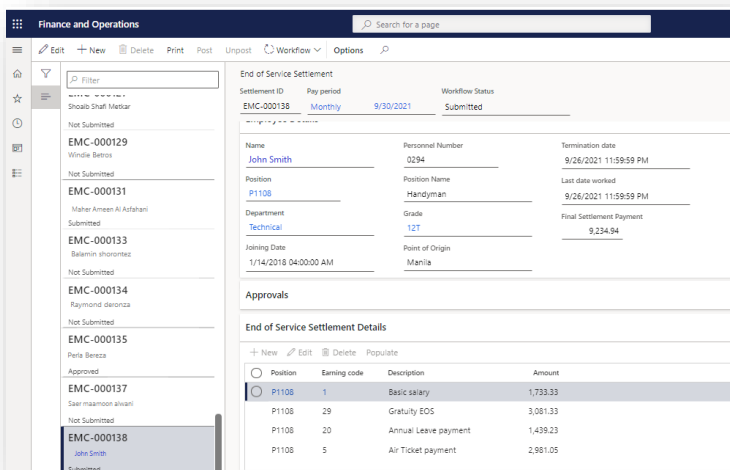
Gratuity Accrual Days Per month	Gratuity Accrual Days Maximum	BASIC PER DAY CALCULATION	Equation Description
1.75	730	Basic Salary*12/360	Equation
Gratuity Accrual Days Per month	After Year		
2.50	5		

Termination

Resignation

Contract Type	From year	To Year	Fixed Days	Yearly Accrual Days
<input checked="" type="radio"/> Unlimited	0.00	3.00	0.00	7.00
<input type="radio"/> Unlimited	3.00	4.00	0.00	14.00
<input type="radio"/> Unlimited	4.00	5.00	0.00	21.00
<input type="radio"/> Unlimited	5.00	99.00	105.00	30.00

Figure 24 -Gratuity Parameterized Calculation



Finance and Operations Search for a page

End of Service Settlement

Settlement ID	Pay period	Workflow Status
EMC-000138	Monthly	9/30/2021 Submitted

Name: John Smith Personnel Number: 0294 Termination date: 9/26/2021 11:59:59 PM

Position: P1108 Position Name: Handyman Last date worked: 9/26/2021 11:59:59 PM

Department: Technical Grade: 127 Final Settlement Payment: 9,234.94

Joining Date: 1/14/2018 04:00:00 AM Point of Origin: Manila

Approvals

End of Service Settlement Details

Position	Earning code	Description	Amount
P1108	1	Basic salary	1,733.33
P1108	29	Gratuity EOS	3,061.33
P1108	20	Annual Leave payment	1,439.23
P1108	5	Air Ticket payment	2,961.05

Figure 25 -Final Settlement