Microsoft Dynamics®

Business Portal for Microsoft Dynamics® GP 2010

Human Resources Management Self Service Suite
Canadian Release

Canadian Release

Welcome to the Canadian release of the Human Resources Management (HRM) Self Service Suite. The HRM Self Service Suite is a collection of applications that are accessible from within Business Portal for Microsoft Dynamics® GP.

Most HRM Self Service Suite features look and function the same way in the Canadian release as they do in the U.S. release. However, there are some differences, which are described in this document.

Check for updated instructions

This information was current as of March 11, 2010. The documentation may be updated as new information becomes available. Check the Microsoft Dynamics GP documentation Web site (http://go.microsoft.com/fwlink/?LinkId=185513) for the most current documentation.

This document is divided into the following sections:

- *System requirements*
- *Applications in the HRM Self Service Suite*
- *Install the HRM Self Service Suite*
- *Synchronize time code and income pay code information*
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System requirements

To use the Canadian release of the HRM Self Service Suite, you must have installed Microsoft Dynamics GP 2010 and one of the following modules:

- Canadian Payroll
- Canadian Integrated Human Resources

For more information about the Business Portal system requirements, see the Business Portal Installation Guide, available in the Documentation folder on your Business Portal installation media.

Applications in the HRM Self Service Suite

The Canadian release of the HRM Self Service Suite contains four applications:

Employee Profile   The Employee Profile application helps employees modify their personal information, such as their address and emergency contact information. Managers can also use Employee Profile to review their employees' performance and position history. Employee Profile must be installed to use any other application in the HRM Self Service Suite.

Time and Attendance   Using the Time and Attendance application, employees can submit timecards, view timecard history information, and enter vacation requests. Managers can approve timecards and enter timecards for their employees.

Skills and Training   The Skills and Training application enables employees—and their managers—to view the skills, education, certifications, and company training information that has been entered for them.

Recruitment   The Recruitment application enables employees to apply for job openings in the company and view the status of submitted applications. Managers can use the Recruitment application to post job openings, view applications, and track the cost incurred by the company to fill a position.

The Employee Pay application is not included in the Canadian release of the HRM Self Service Suite.

Install the HRM Self Service Suite

To install the Canadian release of the HRM Self Service Suite, follow the instructions in the HRM Self Service Suite Administrator's Guide. The HRM Self Service Suite Administrator's Guide (HRMAdmin.pdf) is available in the Documentation folder on your Business Portal installation media.

Synchronize time code and income pay code information

The following procedure explains how to synchronize your time code and income pay code information. You must complete this procedure if both of the following modules are registered in Microsoft Dynamics GP:

- Canadian Integrated Human Resources
- Canadian Payroll

Complete this procedure after installing the Canadian release of the HRM Self Service Suite.

During the synchronization, time code records in the TATM0130 table will be removed. A new time code record will be created for each income pay code that has a pay type of **Regular Pay** or **Overtime**. This process is required so that timecards entered in the HRM Self Service Suite can be posted to the back office Canadian Payroll module.

1. Start Microsoft Dynamics GP and enter your logon information.

2. Open the Payroll Data Import/Export Functions window.
   Tools > **Utilities** > **Payroll - Canada** > **Import and Export**

3. Click **Fill BP Time Entry Files**.

4. A message is displayed indicating that time code records will be replaced. Click **Yes** to continue with the synchronization.

Differences in the Canadian release of the HRM Self Service Suite

Most HRM Self Service Suite features look and function the same way in the Canadian release as they do in the U.S. release. However, there are some differences in the Canadian release.

User interface

The following list describes how the user interface of the Canadian release of the HRM Self Service Suite differs from that of the U.S. release.

- The **Ethnic Origin** field is not displayed on the Profile page.

- The **SSN** field on the Profile page is renamed **SIN** and is formatted and validated according to Canadian guidelines.

- The **State** field is renamed **Province**. (This field is found on several pages in the HRM Self Service Suite).

Time and Attendance application

The Time and Attendance application is part of the HRM Self Service Suite. The following list describes how the Canadian version of Time and Attendance differs from the U.S. version:

- The back office modules that you have registered will affect where timecards are posted.

If this module is registered:	Timecards will be posted to:
Canadian Integrated Human Resources	Canadian Integrated Human Resources
Canadian Payroll	Canadian Payroll
Canadian Integrated Human Resources and Canadian Payroll	Canadian Payroll

- If Canadian Payroll is registered, the **Batch Prefixes** web part on the Timecard Setup page will not be available.

- If Canadian Payroll is registered, batches will be automatically generated for timecards submitted through Time and Attendance.

  When a batch is created, it is given a name that consists of three segments:

  - Segment 1: BP
  - Segment 2: The batch cutoff date.
  - Segment 3: An incremental number, starting with 001.

  For example, a batch with a cutoff date of 15 October 2008 will have an ID of **BP-15102008-001**. If that batch ID already exists, the batch ID will be **BP-15102008-002**.

  For more information about Canadian Payroll batches, see the Microsoft Dynamics GP Canadian Payroll manual.

- If Canadian Payroll is registered, you can select the **Department**, **Position**, and **Notes** options when setting up a timecard restriction. For more information, see

"Create or modify a timecard restriction" in the HRM Self Service Suite Administrator's Guide.

- Employees will enter time using *time codes* or *income pay codes*, depending on what back office modules are registered.

If this module is registered:	Employees will enter time using:
Canadian Integrated Human Resources	Time codes
Canadian Payroll	Income pay codes **Note:** The income pay code must have a pay type of **Regular Pay** or **Overtime**.
Canadian Integrated Human Resources and Canadian Payroll	Income pay codes **Note:** The income pay code must have a pay type of **Regular Pay** or **Overtime**.