

## MICROSOFT BUSINESS SOLUTIONS-NAVISION

**COMMUNICATION TRACKING**

The Communication Tracking module of Microsoft® Business Solutions for Human Resources Management-Navision helps you effectively manage outgoing or incoming communications for Employees, Applicants or References

**Key Benefits**

- Reduce human resources and payroll monthly costs
- Reduce burden on payroll and human resource departments
- Track all incoming communication for employees or applicants
- Send out communications to a group of employees/applicants through the mass communication functionality
- One template can be saved in multiple languages
- Outgoing documents using Microsoft Word can be sent via email, hard copy or fax
- Define and attach salutations to each employee/applicant
- Easy to use Wizard walks you through the process of creating communication documents
- Seamless integration within the other areas of Microsoft Business Solutions-Navision HR Management:
  - Payroll and Human Resources
  - Advanced Human Resources

Traditionally documents related to human resource operations have been stored in paper files that grow and grow over time. Even today, with the “paperless” office concept, documents such as employee reviews, job descriptions, company vision statements, company procedure manuals and so on are often templates or “soft copies” of these documents are stored on the network. However, the primary reference for these documents is the paper based filing system. With the plethora of options for managing documents electronically, more and more organizations want the “paper” file to be electronic, while still having the “paper backup.”

Communication Tracking has been added to Microsoft Navision Human Resources (HRM) to enable you to electronically manage documents that are typically created or stored for employees or applicants. This feature includes:

- The ability to create and maintain documents integrated with the mail merge functionality of Microsoft Word
- Store and maintain any type of externally created documents

Communication templates give you the ability of defining the different types of documents that will be stored and or sent via Microsoft Word mail merge functionality. Communication templates have two purposes:

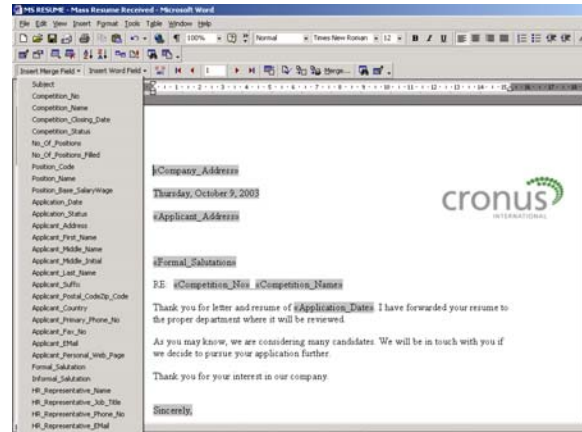
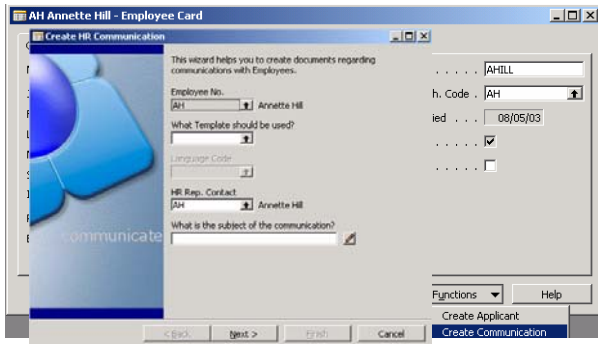
- Provide a standard format for communication with employees, applicants, and references
- Provide a consistent convention under which documents are catalogued

When designing a template using the mail-merge functionality, you have the ability to access numerous fields of data (e.g. Name, address, position, salary, etc) that are located within Microsoft Navision. Thus, you can personalize a standard template for the recipient of the document.

**For more information**

To learn more about Microsoft Business Solutions-Navision HR Management, contact your local Microsoft Business Solutions office, a Microsoft Certified Business Solutions reselling partner, and/or visit [www.microsoft.com/BusinessSolutions](http://www.microsoft.com/BusinessSolutions).

**Storage** – decide where the documents are going to be stored



**Microsoft Word Mail Merge** - allows you to select from multiple fields from within the Microsoft Navision database to personalize outgoing documentation

**Wizard Interface** – walks you through the steps in creating a communication

Code	Description	Communication Source	Communication Format (Default)	Send as Attachment	Language Code (Default)	Wizard Action	Information Flow	Document Created	Entries
COVER	Cover Letter	Applicant				Import	Inbound	No	1
DOCUMENT	Document Received	Applicant				Import	Inbound	No	0
EMAIL	General Email Contact	Employee			ENU	Import	Inbound	No	2
EMAILPOL	Email Policies and Procedures	Employee	E-Mail	<input checked="" type="checkbox"/>	ENU	Open	Outbound	Yes	1
MS RESUME	Mass Resume Received	Competition	Hard Copy		ENU	Open	Outbound	Yes	0
OFFER	Offer of Employment	Competition	Hard Copy		ENU	Open	Outbound	Yes	0
REFERENCE	Reference Check	Applicant	Hard Copy		ENU	Open	Outbound	Yes	0
REJECT	Rejection Letter	Competition	Hard Copy		ENU	Open	Outbound	Yes	0
RES REC	Resume Received Letter	Applicant	E-Mail		ENU	Open	Outbound	Yes	1
RESIGNED	Resignation Letter	Employee				Import	Inbound	No	1
RESUME	Applicants Resume	Applicant				Import	Inbound	No	1
WINTER	Winter Social	Employee	E-Mail		ENU	Open	Outbound	Yes	2

**Communication Templates** – enables you to produce templates in which communications are based

**Mass Communication** – send communications to more than one employee or applicant

Communication Source	Template Code	Description	Language Code	Communi... Date	Communi... Time	Communi... Format	Information Flow	Comment
Applicant	COVER	Cover Letter		06/20/03	12:52:53		Inbound	
Applicant	RESUME	Applicants Resume		06/20/03	12:53:26		Inbound	
Applicant	RES REC	Resume Received Letter	ENU	06/20/03	12:53:43	E-mail	Outbound	

Communication Source	Template Code	Description	Language Code	Communi... Date	Communi... Time	Communi... Format	Information Flow	Comment
Employee	EMAILPOL	Email Policies and Procedures	ENU	06/24/03	7:54:50	E-mail	Outbound	
Employee	WINTER	Winter Social	ENU	06/25/03	7:26:09	E-mail	Outbound	
Employee	EMAIL	General Email Contact	ENU	06/25/03	7:28:28		Inbound	
Employee	RESIGNED	Resignation Letter		06/25/03	9:29:29		Inbound	

**Applicant and Employee Communication History** – kept on each Applicant/Employee card with the ability to drill down and see the exact document

Key Features	Description
STORAGE	<ul style="list-style-type: none"> <li>Documents can be stored internally in the database being used by Microsoft Navision or externally on your server.</li> </ul>
COMMUNICATION TEMPLATES	<ul style="list-style-type: none"> <li>A logical place to define and store the different templates that will be used by your organization.</li> <li>Templates can be created to import documents coming from an external source or be used to define outgoing documents that are created through Microsoft Word.</li> <li>One template can be stored in more than one language so the employee or applicant gets communication in their preferred language.</li> </ul>
WIZARD INTERFACE	<ul style="list-style-type: none"> <li>An interactive Wizard walks you through the process of storing an externally created document on an employee or an applicant's card.</li> <li>An interactive Wizard walks you through the process of creating documents that will be sent out to an employee or applicant.</li> <li>The wizard will use default settings that have been predefined in the communication templates. The user has the ability to override these settings at the time of creation.</li> </ul>
MICROSOFT WORD MAIL MERGE	<ul style="list-style-type: none"> <li>This technology allows the integration of data from Microsoft Navision into a Microsoft Word document at the time that the document is being created.</li> <li>Outgoing documents can be sent via hard copy, fax, or email.</li> </ul>
MASS COMMUNICATION	<ul style="list-style-type: none"> <li>Send out communication to more than one applicant or employee</li> <li>This is available in 2 different areas of the system</li> </ul>
APPLICANT AND EMPLOYEE COMMUNICATION HISTORY	<ul style="list-style-type: none"> <li>Keep a log of all documents on a employee.</li> <li>The documents can be received from an external source or sent out using Microsoft Word Mail Merge technology.</li> <li>View the document directly from the employee or applicant card</li> </ul>

### System Requirements

<p>TO OBTAIN ALL OF THE FEATURES MENTIONED IN THIS FACT SHEET, THE FOLLOWING MODULES AND TECHNOLOGIES ARE REQUIRED:</p>	<p>Microsoft Word (min. version, 2002) for Microsoft Word Mail Merge.</p> <p>Microsoft Business Solutions-Navision supports graphical 32-bit technology and genuine client server, multitasking environment.</p> <p>The following operating systems are supported:            Client 32-bit: Windows XP, Windows 2000, Windows NT, and Windows 98            Server: Navision Database Server: Windows 2000, Windows NT, IBM AIX, IBM OS/400            Microsoft SQL Server Option for Microsoft Business Solutions-Navision: Any operating system supported by MS SQL Server 2000.</p> <p>To obtain all of the above-mentioned features, the following granules are required:</p> <ul style="list-style-type: none"> <li>Communications Tracking</li> </ul>
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