

# Dionix Ltd.

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[www.dionix.co.uk](http://www.dionix.co.uk)

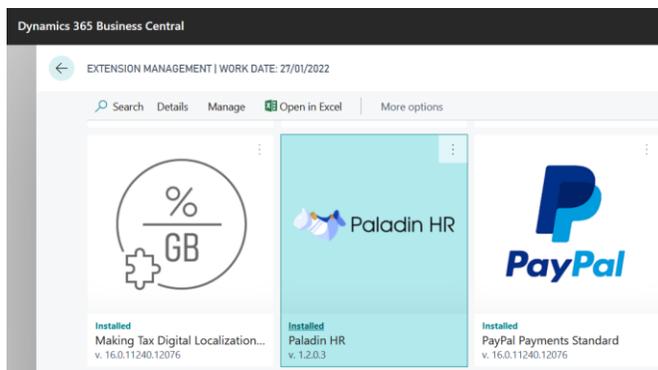
May 2020



## Key Usage Scenarios

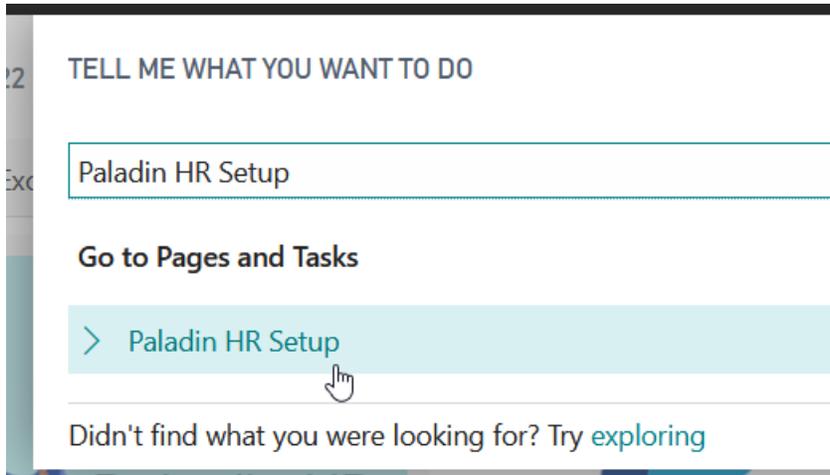
### Installation & Setup

1. Install the extension from the Microsoft AppSource store or manually using the .app extension file.



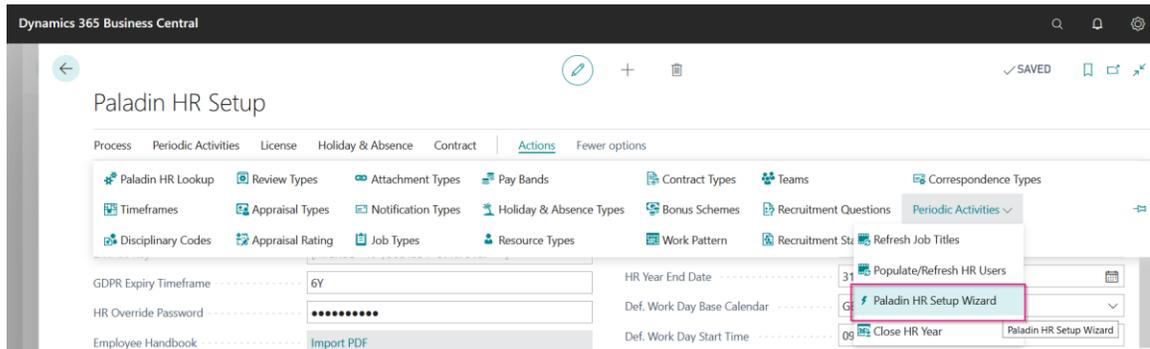
2

2. Open “Paladin HR Setup”



3. Run the “Paladin HR Setup Wizard” from the “Paladin HR Setup” page.

- This will Initialize all the “Codes” eg. Timeframes, Contract Types, Pay Bands etc.
- This will pull across all “Employees” and create a “HR User” record.
- An associated Open HR Contract will be created with the new User.



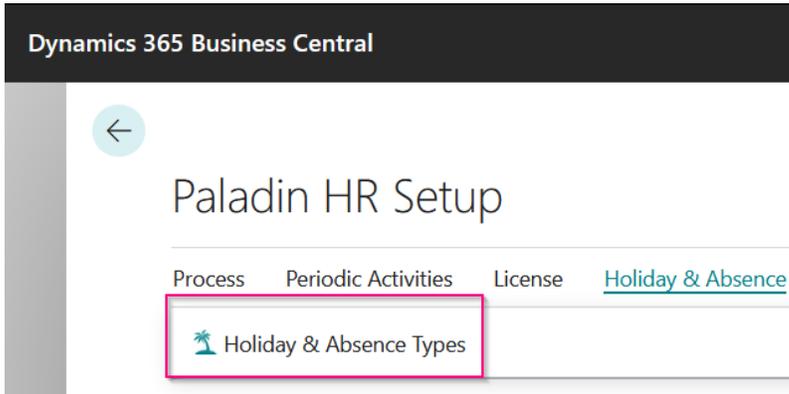
4. Populate the remaining fields in the HR Setup page. “License Key” and “HR Override Password” are **critical** and have been promoted to the top of the page.

### General

Company Name .....	CRONUS UK Ltd.
License Key .....	[REDACTED]
GDPR Expiry Timeframe .....	6Y
HR Override Password .....	●●●●●●●●

3

5. Open the “Holiday & Absence Types” from Paladin HR Setup and enable/disable the “Holiday” / “Authorized” and “Unauthorized” Absence Types.

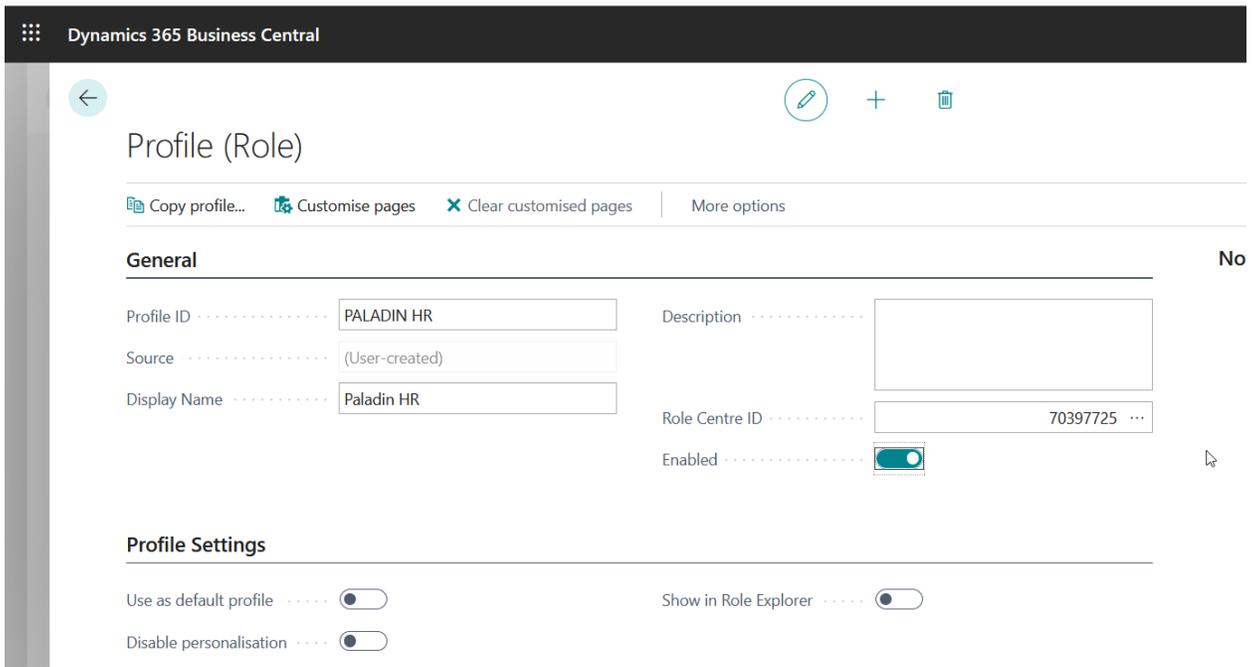
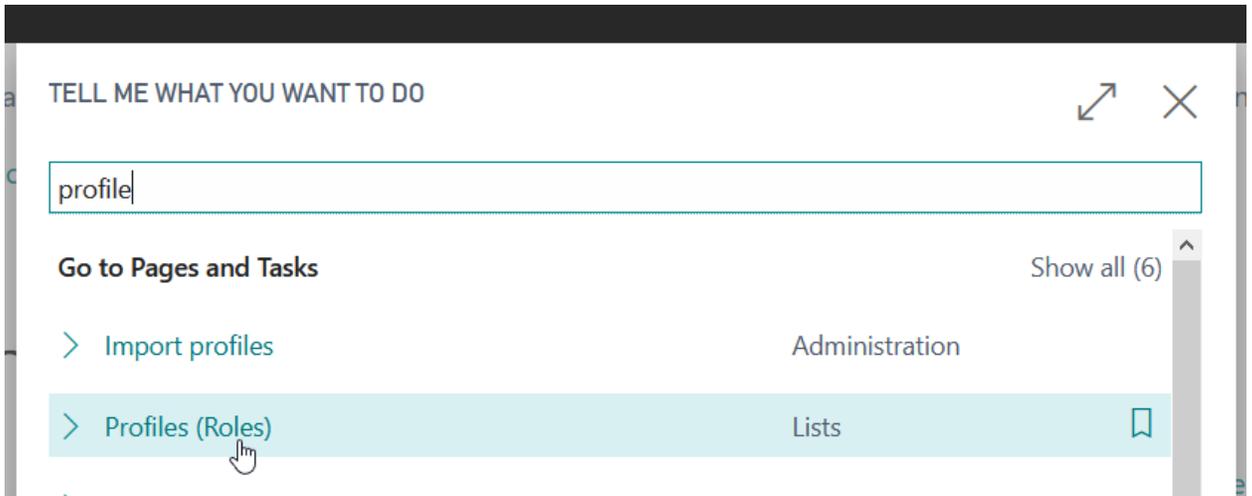


The screenshot shows the "ABSENCE TYPES" table in Dynamics 365 Business Central. The table has a header row with columns: "Code ↑", "Description", "Holiday", "Authoriz... Absence", "Unautho... Absence", and "Overtime". The table contains 14 rows of data. The first row is highlighted in light blue and has a right-pointing arrow in the "Code" column. The "Code" column contains codes like \*HOLIDAY, APPOINTMENT, COMPASSIONATE, EXCEPTION, LATE, MATERNITY, OVERTIME, PATERNITY, SABBATICAL, SICKNESS, TRAINING, and UNAUTH-ABSENCE. The "Description" column contains corresponding descriptions. The "Holiday" column has a checked checkbox for the first row and unchecked for others. The "Authoriz... Absence" column has unchecked checkboxes for the first row and checked for others. The "Unautho... Absence" column has unchecked checkboxes for the first three rows and checked for the last three. The "Overtime" column has unchecked checkboxes for the first six rows and checked for the last two.

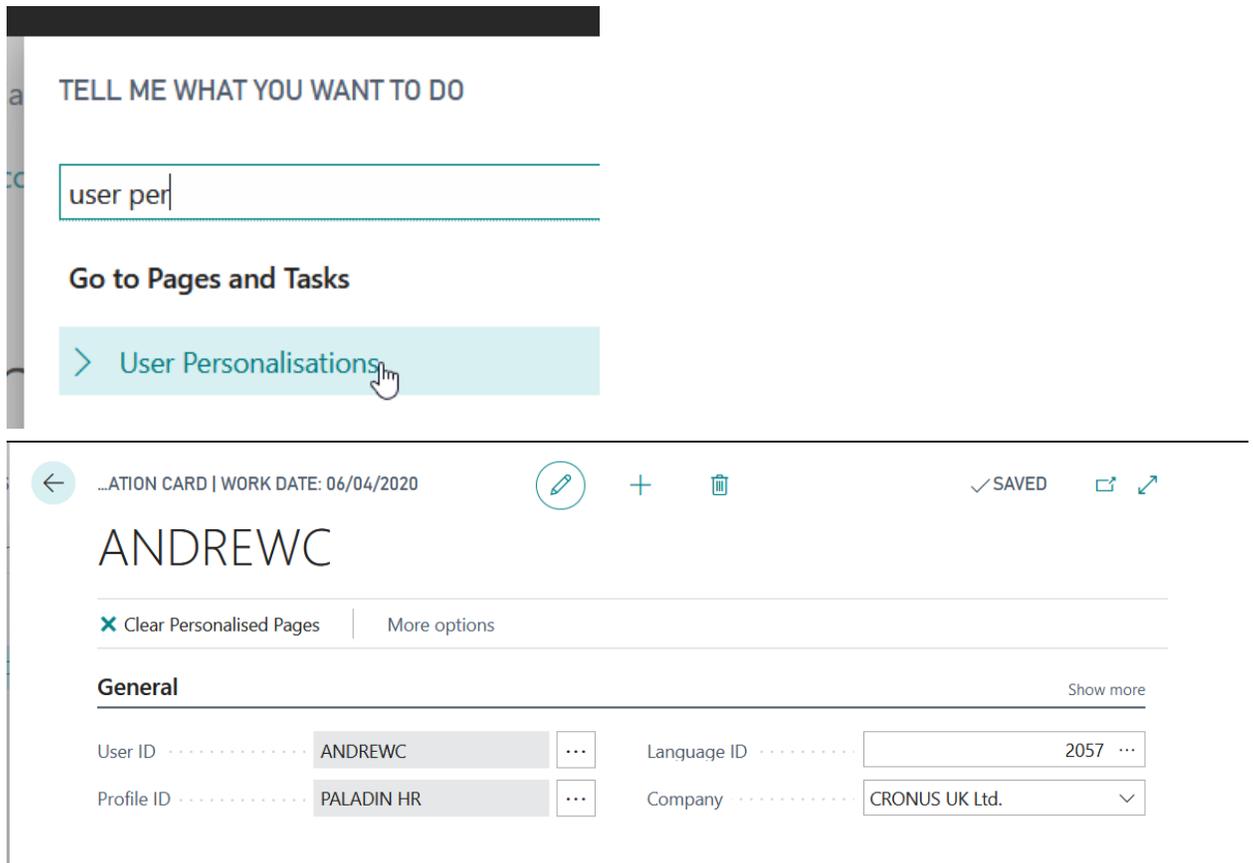
Code ↑	Description	Holiday	Authoriz... Absence	Unautho... Absence	Overtime
→ *HOLIDAY	Holiday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
APPOINTMENT	Routine Medical Appointment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMPASSIONATE	Compassionate/Bereavement	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EXCEPTION	Exceptional Circumstances	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LATE	AWOL / Lateness	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MATERNITY	Maternity	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OVERTIME	Overtime - Authorized	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PATERNITY	Paternity	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SABBATICAL	Sabbatical/Career Break	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SICKNESS	Sickness	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TRAINING	Training	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UNAUTH-ABSENCE	Unauthorized Absence	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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6. Create a new Profile for Paladin HR. Role Centre ID = 70397725



7. If the profile for “Paladin HR” hasn’t been set as the Default Profile then assign the Profile to the User on the “User Personalization” screen.



## Usage

Paladin HR is designed to act an additional “loosely coupled” HR system for Microsoft Dynamics 365 Business Central. This means it does not impact on any standard system functionality and sits as a layer that can easily be installed/uninstalled by the end user.

The aim of Paladin HR is to provide an affordable and easy to setup HR system.

The following key entities are covered as part of this HR system:

- **HR Contracts (the top-level entity)**
- Appraisals

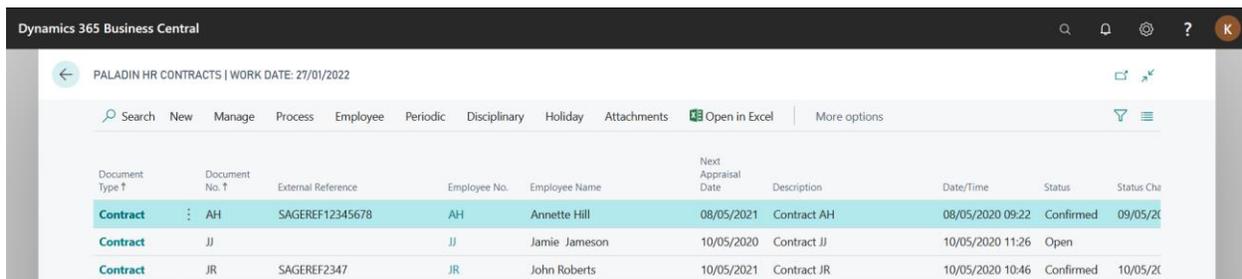
## 6

- Recruitment
- Probation
- Attachments
- Training
- Disciplinary
- Holiday Booking
- Overtime Tracking
- Absence Tracking
- Dynamic Setup Codes for complete customization.
- Auditability
- Enhanced Security for sensitive HR information.

**Note: No Finance or Payroll information is required for this addon.**

### HR Contract

The HR Contract acts as the core of the HR system and each Employee must have a valid HR Contract.



The screenshot shows the Dynamics 365 Business Central interface for 'PALADIN HR CONTRACTS'. The work date is 27/01/2022. The table lists three HR contracts with columns for Document Type, Document No., External Reference, Employee No., Employee Name, Next Appraisal Date, Description, Date/Time, Status, and Status Change.

Document Type	Document No.	External Reference	Employee No.	Employee Name	Next Appraisal Date	Description	Date/Time	Status	Status Cha
Contract	AH	SAGEREF12345678	AH	Annette Hill	08/05/2021	Contract AH	08/05/2020 09:22	Confirmed	09/05/20
Contract	JJ		JJ	Jamie Jameson	10/05/2020	Contract JJ	10/05/2020 11:26	Open	
Contract	JR	SAGEREF2347	JR	John Roberts	10/05/2021	Contract JR	10/05/2020 10:46	Confirmed	10/05/20

The HR Contract is where you can track changes to the Employees contract and raise Appraisals, Disciplinarys, Training, Probation and Holiday booking entities. You can also “sign” a document in order to verify the Employee has agreed to the contract.

From the Contract you can also generate two reports:

HR Contract Document

HR Correspondence (Letter)

Examples Below:

This is the default “Employee Contract” report.

<b>Employee Contract</b>			
John Roberts 327 Elmwood Street W1 3AL London		CRONUS UK, Ltd. 7122 South Ashford Street Westminster W2 8HG London	
<b>Employee No.</b>	JR	<b>Holiday Year</b>	04/01/2020 / 31/03/2021
<b>Employee Name</b>	John Roberts	<b>Job Title</b>	Managing Director
<b>External Reference</b>		<b>Job Type</b>	MD
<b>Description</b>	Contract JR	<b>Pay Band</b>	DIRECTOR
<b>Employee Start Date</b>	01/01/2001	<b>Contract Type</b>	FULL TIME
<b>Employee End Date</b>		<b>Bonus Scheme</b>	ANNUAL2
<b>Union</b>		<b>Resource Type</b>	EMPLOYEE
<b>Medical Information</b>	NA	<b>Team</b>	MANAGEMENT
<b>Emergency Contact Info.</b>	Amy Roberts - 01548787959		
<b>Holiday Approver</b>	John Roberts		
<b>Reports To</b>	John Roberts		
<b>Employee Signature</b>	JR		
<b>Employee Signed</b>	10/05/2020		

And these are the default “Correspondence Types” (if you used the Wizard). The Correspondence Type also has the option to add customizable text in order to populate the report. Example below:

Employee No.	Employee Name	Date	Description
TC	Timothy Crook	25/05/2020	Contract TC

**i** Please select a Correspondence Type

JOINING

LATENESS

NEW STARTER

RESIGNATION

## Employee Letter

John Roberts  
327 Elmwood Street  
W1 3AL London



CRONUS UK, Ltd.  
7122 South Ashford Street  
Westminster  
W2 8HG London

Dear John Roberts,

Welcome to Paladin HR! We are pleased that you have passed our interview process. Please spend some time to review your employee handbook and familiarize yourself with your new work environment.

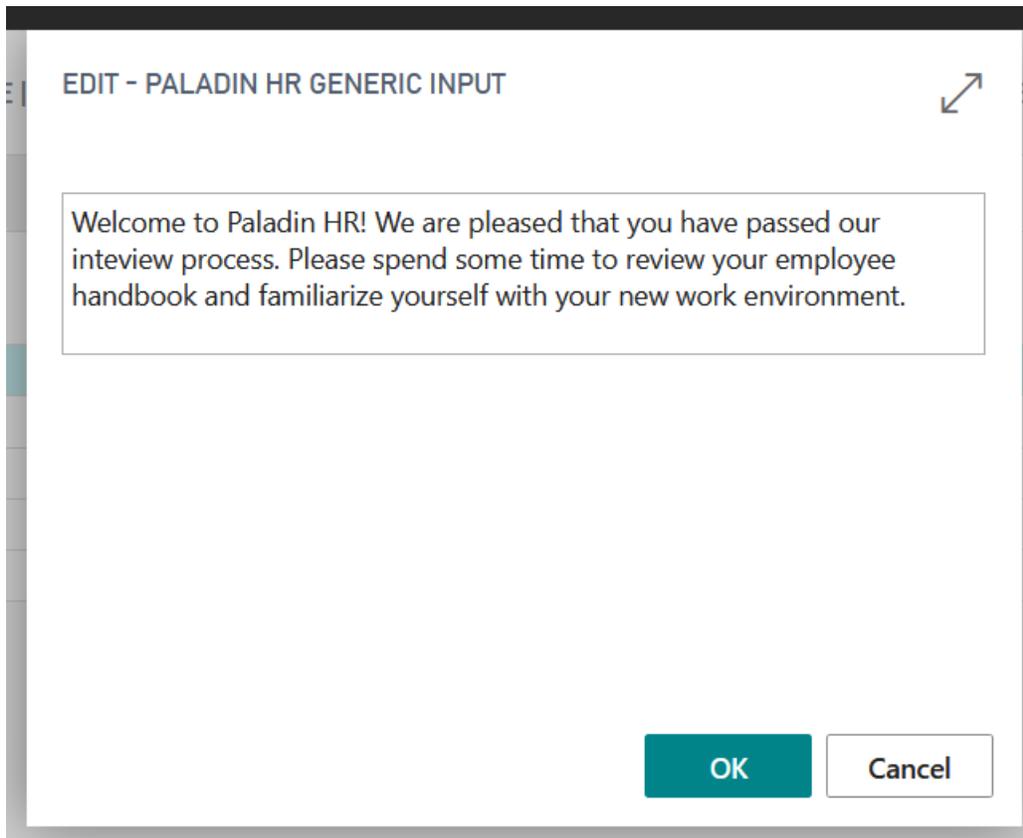
Yours Sincerely,  
Annette Hill

← CORRESPONDENCE TYPE | WORK DATE: 27/01/2022
✓ SAVED 🔖 📧 🔗

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🔍 Search + New 🔧 Edit List 🗑 Delete 📄 Open in Excel
🔍 ☰

Code ↑	Report ID	Custom Report Code	Custom Report Description	Long Text
→ JOINING	70397702	-		Long Text...
LATENESS	70397702	-		Long Text...
NEW START...	70397702	-		Long Text...
RESIGNATI...	70397702	-		Long Text...



## Role Center

The Role Center has been designed to assist the HR Administrator carry out HR tasks. You can access all the Key entities from the dashboard Ribbon or Cue Tiles.

Dynamics 365 Business Central

CRONUS UK Ltd. | HR

HEADLINE

Want to learn more about  
Paladin HR?

ACTIONS

- > HR Contracts
- > HR Appraisals
- > HR Disciplinarys
- > HR Recruitment
- > HR Training
- > HR Attachments
- > HR Probation
- > HR Training Course
- > HR Overtime
- > HR Absence
- > Employee
- > Holiday
- > Setup
- > History

Activities

HR Dashboard

CONTRACTS			APPRAISALS		HOLIDAY REQUESTS		EMPLOYEE ABSENCE	
CONTRACTS (CONFIRMED)	CONTRACTS (OPEN)	CONTRACTS (CLOSED)	APPRAISALS - (TODAY)	APPRAISALS - (FUTURE)	MY HOLIDAYS - APPROVE	HOLIDAYS TO APPROVE	EMPLOYEES A... (TODAY)	EMPLOYEES A... (FUTURE)
2	7	0	4	5	0	0	2	0

## Holiday Booking

This can be performed from the HR Contract “Book Holiday” and approval emails **can** be sent to the HR Approver if this has been setup against the HR User (see HR User card >> Approver fields).

Dynamics 365 Business Central

PALADIN HR CONTRACTS | WORK DATE: 27/01/2022

Search New Manage Process Employee Periodic Disciplinary **Holiday** Attachments Open in Excel More options

**Book Holiday** Holiday Requests Approve All Holiday Requests Reject All Holiday Requests

Document Type ↑	Document No. ↑	External Reference	Employee No.	Employee Name	Appraisal Date	Description
Contract	AH	SAGEREF12345678	AH	Annette Hill	08/05/2021	Contract AH
Contract	JJ		JJ	Jamie Jameson	10/05/2020	Contract JJ

Holidays can be booked for Half Days and Full Days by using the Full Day / AM / PM drop down list. The booking calculation uses the “Base Calendar” to work out non-working days. This is defined against the HR Setup table and against the HR Contract record.

EDIT - PALADIN HR DATE BOOKING

Date From .....

Date From Type ..... Full Day

Date To .....

Date To Type ..... Full Day

Description ..... Holiday Request

? You have requested 3 days holiday for Employee AH. Is this correct?

LM Linda Martin 11/05/2020 Contract LM

**i** Please select an Absence Type

\*HOLIDAY

**?** Send Holiday Request Email?

Dynamics 365 Business Central

PALADIN HR HOLIDAY REQUEST | WORK DATE: 27/01/2022

SEARCH Edit List Delete Attachments Approval Action Open in Excel More options

Approve Holiday Request
  Reject Holiday Request
  Cancel Holiday Request

Entry No. T	Type	Employee Name	Description	End Date	Day	Type	Day	Type	
→ 34	Holiday Re...	Annette Hill	Holiday Request	11/05/2020	13/05/2020	<input type="checkbox"/>	Full Day	<input type="checkbox"/>	Full Day

Here is the Approval Request Email – this allows the Approver to approve the Holiday Request by clicking the embedded link contained in the email.

### Holiday Approval Request - AH



**Andrew Cowan**  
 To [info@dionix.co.uk](mailto:info@dionix.co.uk)  
 Cc [Andrew Cowan](#)

Sun 10/05/2020 17:00

Hello John Roberts,

You have a pending Holiday Approval Request for Annette Hill  
 11/05/20 Full Day - 13/05/20 Full Day  
 Holiday Request

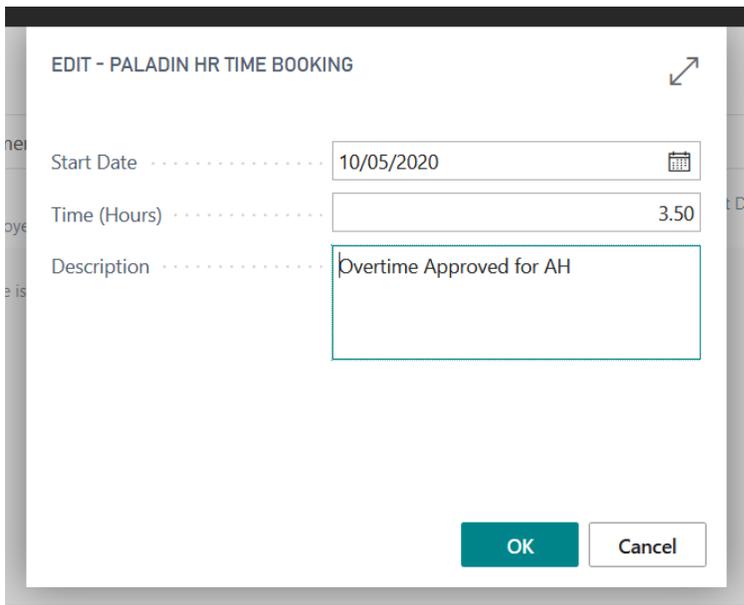
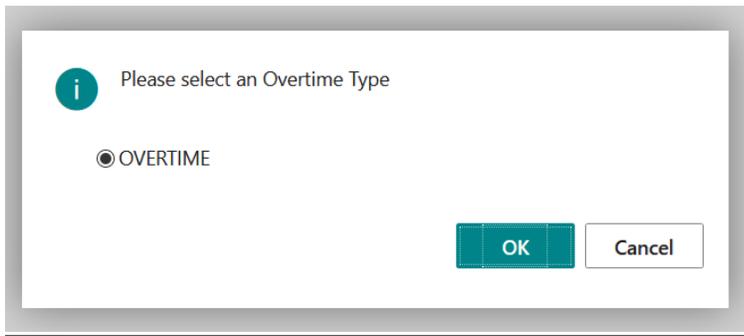
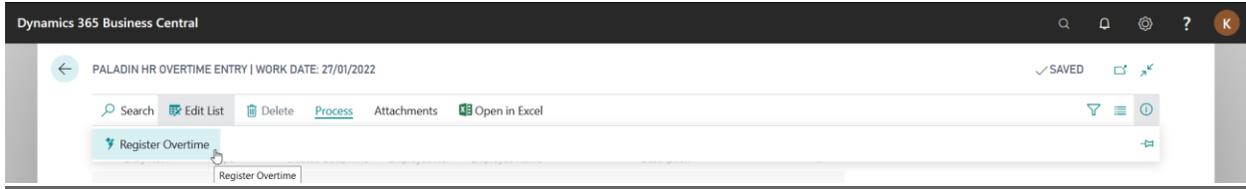
[Approve \(Web\)](#)

Regards,  
 CRONUS UK Ltd.

Notification messages are sent automatically and cannot be replied to.

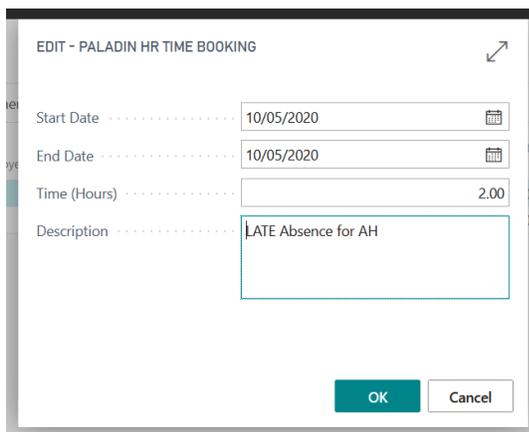
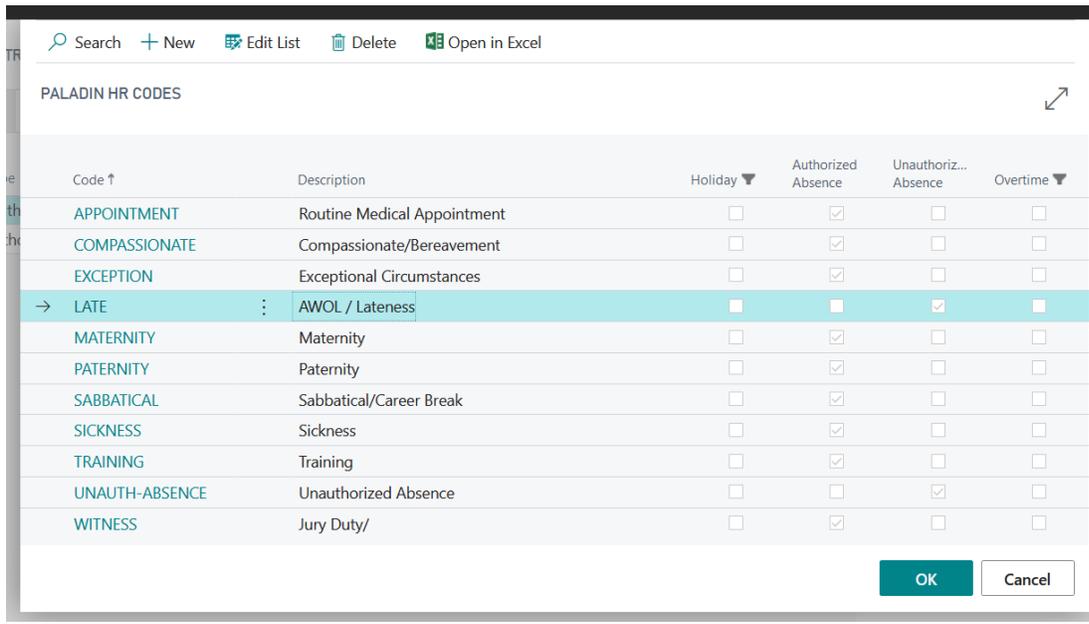
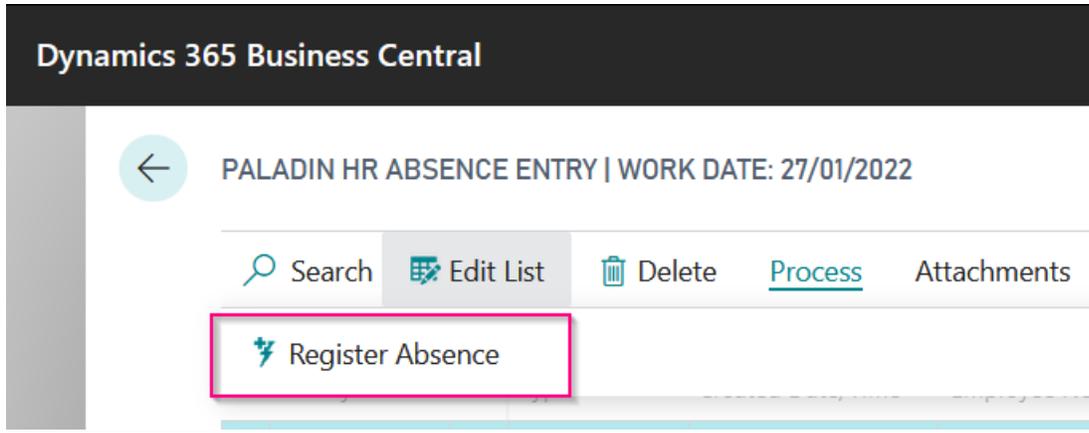
## Overtime Registration

Overtime can be registered against a Contract from the “Overtime Entry” worksheet. This will allow the user to select an “Absence Type” as per the “Holiday & Absence Type Setup”



## Absence Registration

Absences can be registered against a Contract from the “Absence Entry” worksheet. This will allow the user to select an “Absence Type” as per the “Holiday & Absence Type Setup”



**Recruitment / Appraisal / Probation / Disciplinary / Training**

These entities are created from the HR Contract and Role Center and use the same source table. A Document is generated based on the No. Series from Paladin HR Setup.

**Number Series**

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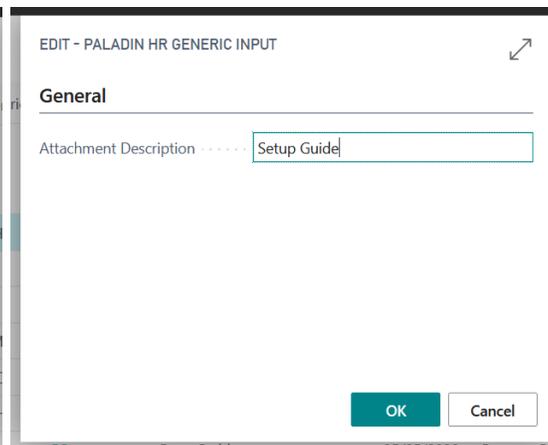
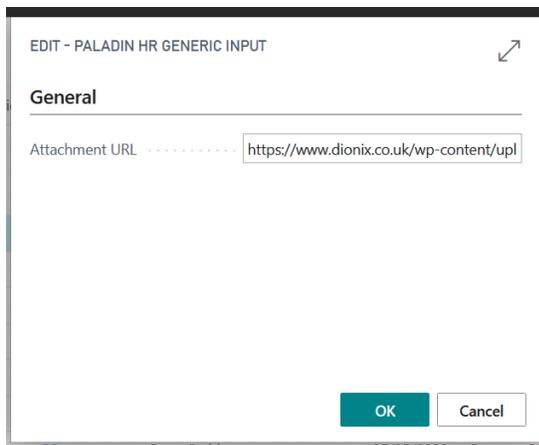
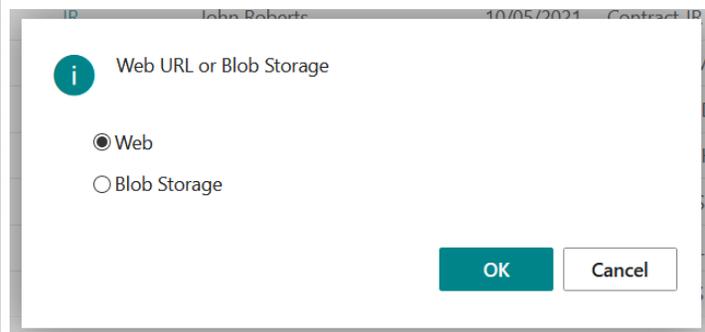
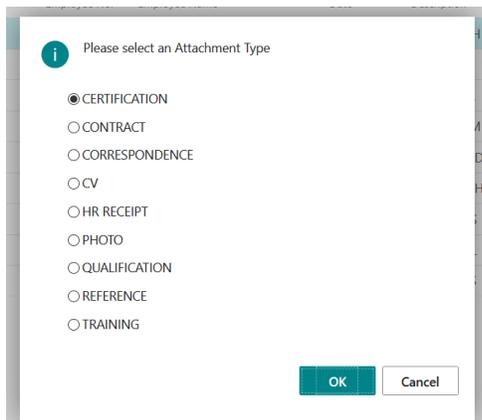
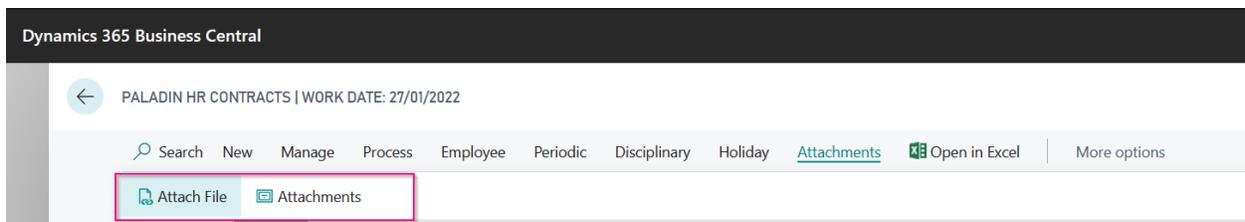
Appraisal Nos. ....	APP	Training Nos. ....	TRAIN
Disciplinary Nos. ....	DISC	Probation Nos. ....	PROB
Recruitment Nos. ....	RECR		

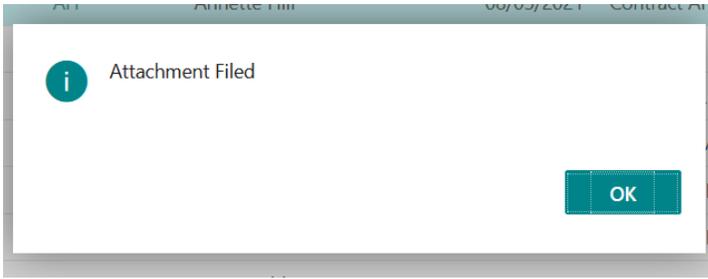
## HR Attachments

HR Attachments can be attached from any HR Entity and rely on the Employee No. and Record ID of the originating document. The HR Attachment can either be:

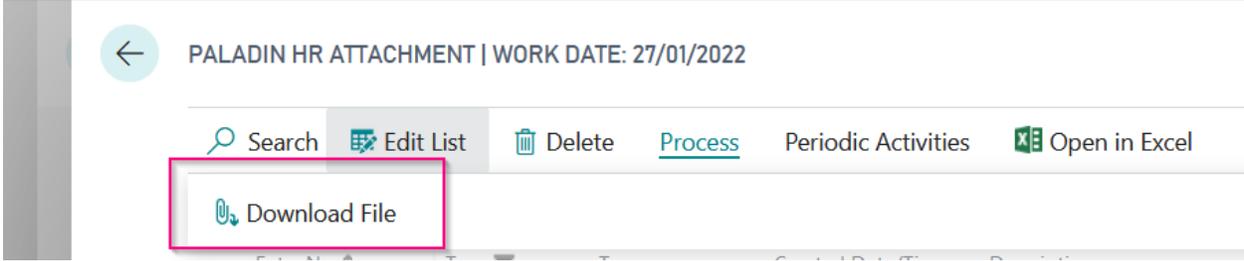
- A URL
- An internally stored BLOB file.

Due to the low number of documents being processed by a HR System (as opposed to a Purchasing department) we have concluded BLOB storage would be viable option for a small business. URL attachments are the default method as this way the database does not grow unnecessarily large but the User can choose to select BLOB Storage.





Dynamics 365 Business Central



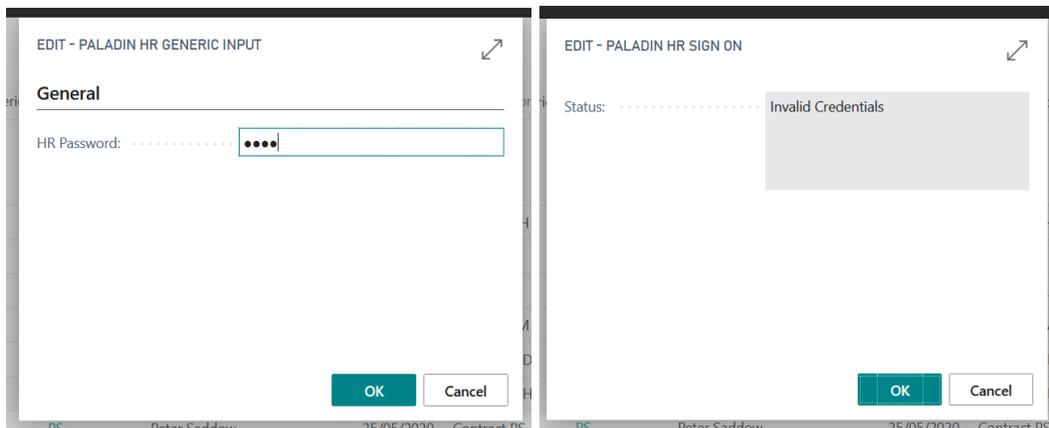
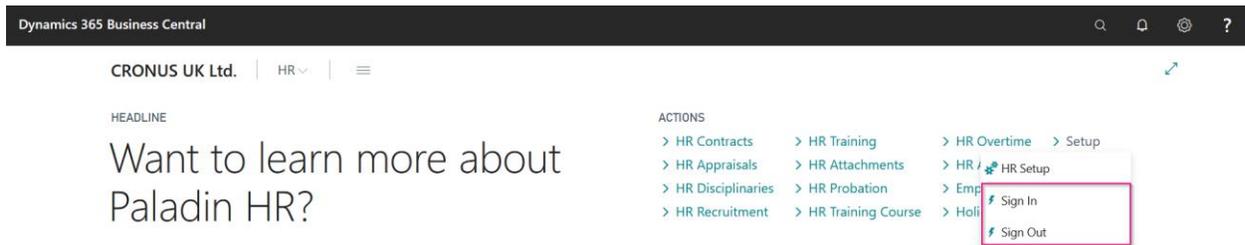
## HR Security

Security has two levels:

Override Level – Password defined on the Paladin HR Setup page.

HR Administrator Level – Password defined on the Paladin HR User page for individual HR super users.

The users can Sign In / Sign Out of the HR system from the Role Center. Or alternatively will be prompted for the HR Password when accessing HR pages.



Dynamics 365 Business Central

PALADIN HR USER | WORK DATE: 27/01/2022

AH

Process Attachments More options

General >

Self Service >

Approver >

Line Manager >

Advanced

HR Administrator  HR Administrator Passwo...