



Dovetail Implementation High Level Requirements

Transforming the Employee Experience



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Introduction

This document details each of the three major applications of the Dovetail HR Service Delivery solution, and breaks down each application into the implementation requirements that are available for a Dovetail customer. Not all of the requirements listed are mandatory.

- Dovetail Employee Portal
- Dovetail HR Case Management
- Dovetail HR Knowledge Management

Dovetail Employee Portal Implementation Requirements

REQID	Title	Functional Area	Short description of requirement
EP01	Global Setup & Branding	Tenant Settings	Logo, URL, CSS, Logos, Tenant options
EP02	Portal Configurations	Portal Setup	Personas Menu Structures Home and Help Pages Cultures
EP03	Technical Setup	Tenant Settings	Single Sign On (SSO) Data Feed (SSO details, Portal Filters)
EP04	Content Structure	Employee Portal	Solution layouts and templates
EP05	Portal Case Management	Core Employee Cases	Case Page Options Case Entry Case Workflow Case Closure Portal Case Types and Mapping Case Templates
EP06	Chat and AI	Channels	AI Chat Live Chat Chat Bots Chat Bot API
EP07	Data Migration	Migration	Import existing content
EP08	Assisted Content Entry	Migration	Manual entry of solutions and content
EP09	Check Track Trace	Channels	Symptom Check for COVID-19
EP10	Portal Welcome Video	Engagement & Graphical Design	Using our portal video partner
EP11	Content Infographics	Engagement & Graphical Design	Using our design partner

EP12	Reports	Reporting	Custom reports
EP13	Employee Portal API	Integrations	Integrations using Dovetail Portal API's
EP14	Portal Admin Training	Training	Training on how to administrate the Portal
EP15	Portal User Training	Training	Training on how to create and share content for portal

Dovetail HR Case Management Implementation Requirements

REQID	Title	Functional Area	Short description of requirement
CM01	Global Setup	Tenant Settings	Branding - Logo, URL, Tenant Settings
CM02	Company Reference Data	Data	Users Employees Sites Organizations Work Calendars
CM03	Technical Setup	Tenant Settings	Data Feed Single Sign On (SSO) Password Settings Email Integration
CM04	Roles and Permissions	Access	Roles and Permissions Case Data Restrictions Employee Data Restrictions
CM05	Case Management	Core Cases	Which HR Services/ Transactions will be supported through Dovetail Case Entry (Channels, Types, Restrictions) Case Workflow (Processes, Notifications, Escalations, HR Console) Case Closure (Process, Notifications, Metrics)
CM06	Data Retention	Retention	Manual and automated data retention through case redaction and employee purge
CM07	Service Level Agreements	Case Management	SLA setup Non Working Schedules Workflow, Notifications, Metrics

CM08	Case Management Training	Training	Based on customer requirements for training HR teams on USER and ADMIN HR Case Management
CM09	Reports	Reports	Additional Custom Reports
CM10	Reports Training	Training	Basic and Advanced Reports Training
CM11	Data Migration	Migration	Migration of legacy cases and attachments
CM12	Case Management API	Integrations	Integrations using Dovetail API's

Dovetail HR Knowledge Base Implementation Requirements

REQID	Title	Functional Area	Short description of requirement
KM01	Global Setup	Tenant Settings	Default tenant settings
KM02	Technical Setup	Tenant Settings	Data Feed updates with Portal Filters
KM03	Roles & Permission	Application Settings	Configuration of permissions in Dovetail for users
KM04	Knowledge Management	Core Knowledge	Which HR Knowledge will be contained within Dovetail. Employee/ HR facing Knowledge Entry (Types, Filters) Knowledge Workflow (Processes, Approval, Editing, Review), Notifications HR Console
KM05	Data Import	Portal Filters Data Feed	Import of existing knowledge content
KM06	Infographics	Engagement & Graphical Design	Content conversion to infographics through our design service
KM07	Training	Training	Based on customer requirements for training
KM08	Reports	Reports	Additional custom reporting
KM09	Content API	Integrations	Integrations using Dovetail APIs