

Finance and Operations

USMF 🔍 🌐 🛡️ ? AE

Modules

Asset leasing

Asset management

Audit workbench

Budgeting

Cash and bank management

Checks

Common

Consolidations

Cost accounting

Cost management

Credit and collections

Demo data

Engineering change management

Expense management

Fixed assets

Fleet management

General ledger

Global stock accounting

HR business process

Human resources

Landed cost

Leave and absence

Master planning

NextGen Payroll

Organisation administration

Expand all Collapse ...

Workspaces

Workers

Positions

Jobs

Departments

Departments

Department hierarchy

Departments report

People by department report

Benefits

Compensation

Absence

Recruitment

Competencies

Performance

Courses

Task management

Business process

User defined links

Setup

Human resources > Departments > Departments

Business performance planning

Copilot for Finance (Preview)

Demand planning

Human Resources

Invoice capture

Recruiting add-on (Preview)

Stock Visibility

Compensation management

Expense management

Optimisation advisor

Purchase order receipt and follow-up

Supplier invoice entry

AA

Confirmed purchase orders with changes

Feature management

Outbound work monitoring

Recruitment management

Supplier payments

social media

Cost accounting ledger administration

Financial analysis - all companies

Outbound work planning

Released product maintenance

Supply risk assessment

My workspace 4

Cost administration

Financial analysis - current company

Payment workspace

Reservation management

System administration

f

Cost analysis

Financial period close

Payroll management

Resource lifecycle management

Task management

NOHA

Finance and Operations Human resources > Departments > Departments

USMF ? AE

Edit View in hierarchy Operating unit Options

Filter

Department

Accounting Department
000001203
Department

Administration AH
000001150
Department

Berlin HQ
1010
Department

BS
316
Department

Business Intelligence & Risk ...
310
Department

CAI3 Human Resources
553
Department

CAI3 MK HCM

Ahmed osama ▾

Operating unit

Name: Accounting Department

Department number: 000001203

Operating unit type: Department

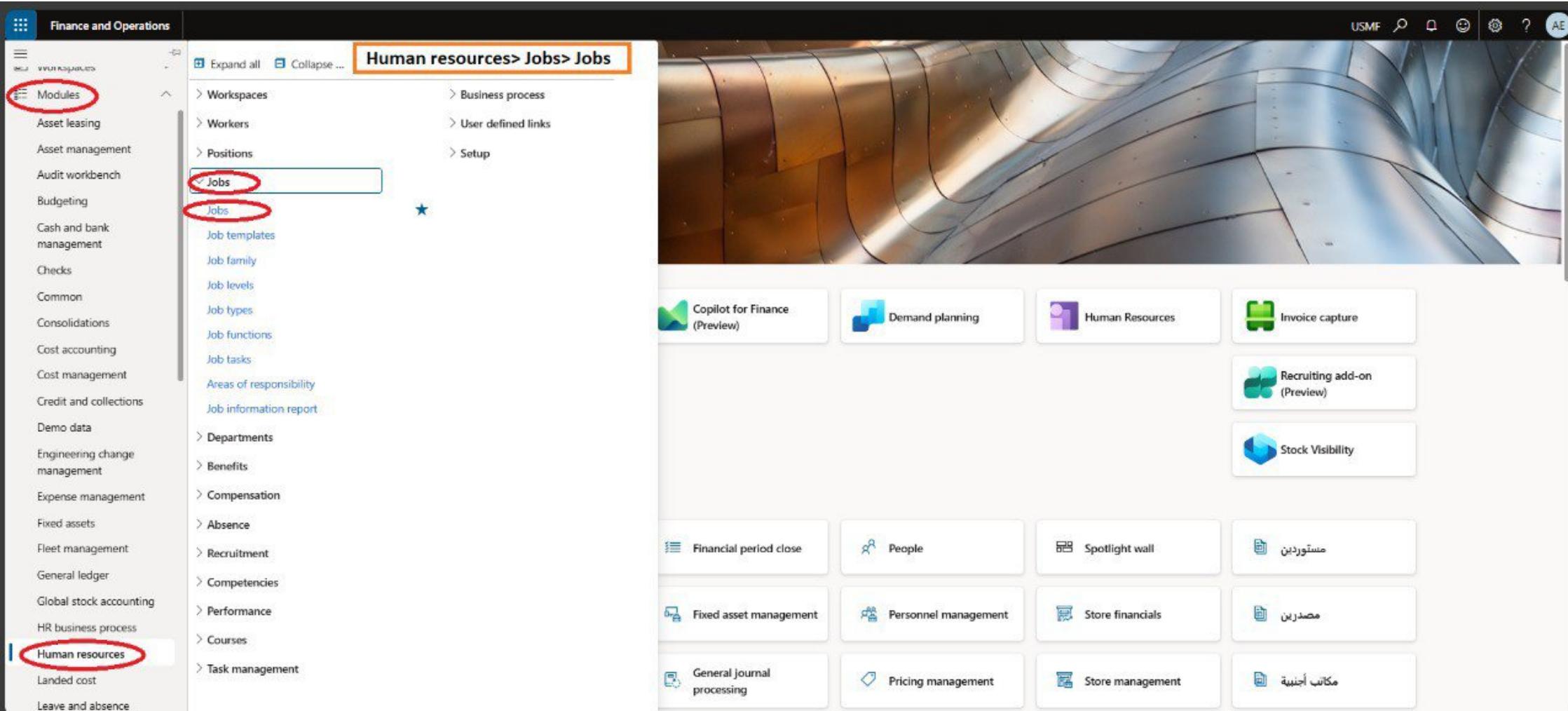
General

Search name: Accounting Department	Memo: communicates financial updates, policy changes, deadlines, or reminders.	In hierarchy: <input checked="" type="checkbox"/> Yes	Manager: _____
		DUNS number: _____	

Addresses

Contact information

Human resources> Departments> Departments



Finance and Operations Human resources > Jobs > Jobs USMF ?

[Save](#) [New](#) [Delete](#) [Copy from](#) ADA Changes timeline Options

Job Standard view Human resources> Jobs> Jobs

Accountant 4 : Accountant 4

General

Job Accountant 4	Description Accountant 4	Title Accountant	Full-time equivalent 1.00	Maximum number of positions <input checked="" type="radio"/> Maximum positions <input type="radio"/> Unlimited 10
----------------------------	-----------------------------	---------------------	------------------------------	--

Description

Responsible for managing and recording a company's financial transactions. They prepare financial statements, monitor budgets, handle invoices and payments, and ensure that all financial records are accurate and comply with laws and regulations. Accountants also analyze financial data to help management make informed business decisions and maintain the organization's financial stability.

Job classification

Function 0700	Job type Clerical	Job family Financing	POS permission group
------------------	----------------------	-------------------------	----------------------

Compensation

Finance and Operations Human resources > Jobs > Jobs USMF ? AE

Save New Delete Copy from ADA Changes timeline Options

Job | Standard view

Accountant 4 : Accountant 4 Human resources>Jobs>Jobs

Job classification Compensation Skills

+ Add Remove

	Skill	Description	Level	Importance
<input checked="" type="checkbox"/>		* Form information	*	None

Personalise: Skill Export all rows Export marked rows Insert columns... Group by this column Freeze column Hide this column View shortcuts

+ Add Remove

	Skill	Description	Level	Importance
<input checked="" type="checkbox"/>		* Form information	*	None

Form information Personalise: Skill Export all rows Export marked rows Insert columns... Group by this column Freeze column Hide this column View shortcuts

Certificates Tests Education Screenings Job tasks

View details

Finance and Operations Human resources > Jobs > Jobs USMF ?

Save **+ New** Delete Options Filter

Standard view **Human resources>Jobs>Jobs**

Skills

Skill	Description	Rating	Skill type
Math skills	Mathematical skills	Skills	Finance

Notes

used for calculations, budgeting, and financial analysis.

Math skills Mathematical skills Skills Finance

MeetingCond Conduct meetings

MeetingPlan Plan meetings

MEngineer Mechanical Engineer

MSAccess Microsoft Access

MSCRM Microsoft Dynamics CRM

MSDAX Microsoft Dynamics AX

MSEExcel Microsoft Excel

MSPowerPoint Microsoft PowerPoint

Finance and Operations | Human resources > Jobs > Jobs

Save + New Delete Copy from ADA Changes timeline Options

Job | Standard view

Human resources> Jobs> Jobs

Accountant 4 : Accountant 4

Skill

Skill	Description	Level	Importance
Budgeting	Budgeting	5	Skills 6 - Most
Analytical	Analytical thinking	5	Skills 6 - Most
Math skills	Mathematical skills	5	Skills 6 - Most
Computer skills	Computer skills	5	Skills 6 - Most
Time Manage	Time management	5	Skills 6 - Most

Certificates

Certificate type	Description	Importance
CPA	Certified public accountant	None
CMA	Certified management ac...	None
CA	Chartered accountant	None

Tests

Education

Education	Description	Importance
Accounting	Accounting	6 - Most

Finance and Operations Human resources > Jobs > Jobs

Job | Standard view

Accountant 4 : Accountant 4 Human resources> Jobs> Jobs

Job tasks

+ Add Remove

Recording	Job task	Description
Record transactions	Recording	Record transactions
Preparing	Note	
Prepare statements & taxes		
Manage budgets		
Manage budgets		
Handle payments		
Handle payments		
Audit accounts		
Audit accounts		

Areas of responsibility

+ Add Remove

Area of responsibility	Description
Form information	
Personalise: Area of responsibility	
View shortcuts	
View details	

The screenshot shows the Microsoft Dynamics 365 Finance and Operations application. The top navigation bar includes 'Finance and Operations', 'Human resources', 'Jobs', and 'Jobs'. Below the navigation is a toolbar with standard icons like Save, New, Delete, Copy from, ADA, Changes timeline, Options, and a search icon. The main content area displays 'Accountant 4 : Accountant 4' under 'Human resources> Jobs> Jobs'. The 'Job tasks' section lists various tasks such as Recording, Record transactions, Preparing, Prepare statements & taxes, etc., with a 'Recording' task currently selected. The 'Areas of responsibility' section lists areas like Form information, Personalise: Area of responsibility, View shortcuts, and View details. A context menu is open over the 'View details' item, showing options: 'Form information', 'Personalise: Area of responsibility', 'View shortcuts', and 'View details'. Red circles are drawn around the '+ Add' button in both sections and around the 'Recording' task in the Job tasks list.

Finance and Operations Human resources > Jobs > Jobs USMF ?

Save + New Delete Copy from ADA Changes timeline Options

Last Step

Job Standard view Accountant 4 : Accountant 4 Human resources> Jobs> Jobs

Audit accounts

Areas of responsibility

+ Add Remove

	Area of responsibility	Description
Analysis	R	Financial analysis
Auditing	R	Recruitment processes
Auditing and compliance	R	Reporting Financial reporting
Taxation		
Tax management		
Budgeting		
Budget control		

of rows
2 rows

Accountant 4 : Accountant 4

Human resources> Jobs> Jobs

Audit accounts

Areas of responsibility

+ Add Remove

	Area of responsibility	Description
Analysis	R	Financial analysis
Auditing	R	Recruitment processes
Auditing and compliance	R	Reporting Financial reporting
Taxation		
Tax management		
Budgeting		
Budget control		

of rows
2 rows

Finance and Operations USMF 🔍 🌐 ? AE

Modules

- Asset leasing
- Asset management
- Audit workbench
- Budgeting
- Cash and bank management
- Checks
- Common
- Consolidations
- Cost accounting
- Cost management
- Credit and collections
- Demo data
- Engineering change management
- Expense management
- Fixed assets
- Fleet management
- General ledger
- Global stock accounting
- HR business process
- Human resources**
- Landed cost
- Leave and absence
- Master planning

Expand all Collapse ...

Workspaces Business process

Workers User defined links

Positions Setup

All positions

Active positions

Open positions

Inactive positions

Position hierarchy

Position hierarchy validation

Position hierarchy types

Position types

Positions by department report

Jobs

Departments

Benefits

Compensation

Absence

Recruitment

Competencies

Performance

Courses

Task management

Human resources > Positions > All positions

Finance and Operations Human resources > Positions > All positions USMF ? AE

All positions Create new position Standard

Position: 002552

Job: Accountant 4

Department: Accounting Department

Activation: 01/11/2025 00:00:00

Retirement: Never

Create position

Human resources > Positions > All positions

	Worker	Job	Job level
	نادر السيد ابو بكر	Warehouse Worker	الدرجة الثانية
	John Emory	Warehouse Worker	الدرجة الثانية
	Ellen Gasca	Warehouse Worker	الدرجة الثانية
	Ellen Hansen	Warehouse Worker	
	Pierre Hezi	Warehouse Worker	
	Theresa Jayne	Warehouse Worker	
	Ted Howard	Warehouse Worker	
	Josh Edwards	Store Manager	
	Ofer Daliot	Store Manager	
	Burke Fewel	Store Manager	
	Jeroen Cool	Store Manager	
	noha mohammed	ERP System Control O	
	Andrew Davis	Store Manager	

of rows Calculate

Finance and Operations | Human resources > Positions > All positions | USMF | AE

All positions | Standard view

002552 : Receivable accountant

General

Position 002552	Job Accountant 4	Department Accounting Department	Position type Full-time	Location	Job family Financing
Description Receivable accountant	Job level Professional	Title Accountant	Full-time equivalent 1.00	Available for assignment	Recruiting request
Template ID					

Position duration

+ New | Edit | Retire

Activation 01/11/2025	Retirement Never
--------------------------	---------------------

Reports to position

+ New | Edit | End

Reports to position 000100	Worker Phyllis Harris	Effective 01/11/2025	Expiration Never
-------------------------------	--------------------------	-------------------------	---------------------

Worker assignment

+ New | Edit | End

Worker	Assignment start	Assignment end	Reason code
--------	------------------	----------------	-------------

Finance and Operations

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Credit and collections

Demo data

Engineering change management

Expense management

Fixed assets

Fleet management

General ledger

Global stock accounting

HR business process

1 Human resources

Landed cost

Leave and absence

Master planning

NextGen Payroll

Organisation administration

Payroll

Pricing management

Procurement and sourcing

Product information management

Production control

Project management and accounting

Purchase ledger

Expand all Collapse ...

> Workspaces Mass hire projects report

> Workers Competencies

> Positions Performance

> Jobs Courses

> Departments Task management

> Benefits Business process

> Compensation User defined links

> Absence Setup

> Recruitment

2 > Recruitment projects

3 Recruitment projects ☆

Mass hire projects report

Media

Media types

Recruitment projects report

Application status by project report

> Applications

> Applicants

> Communication

> Skill analysis

Accommodation list

Mass hire projects

Human Resources Recruiting add-on (Preview)

voice capture Stock Visibility

دادرس budgets and recasts Released product maintenance التسجيلات التجارية

aintenance request management Reservation management مستلزمات إنتاج

aster planning Resource lifecycle management مستوردين

business processes Optimisation advisor Retail and Commerce IT مصادر

optimisation advisor Sales order processing and enquiry مكاتب أجنبية

Finance and Operations | Human resources > Recruitment > Recruitment projects > Recruitment projects

USMF 🔍 📈 😊 🚧 ? AE

[←](#) [Edit](#) [+ New](#) [Delete](#) Applications Media Developments Job ad Print accommodations Recruitment project status ↴ Options [🔍](#)

Recruitment projects

Standard view ↴

Filter

Human resources > Recruitment > Recruitment projects > Recruitment projects

Recruitment proj...	Description	Recruiter	Project status	Open date	Application deadline	Close date
12345	Account Manager	Jodi Christiansen	Started	26/07/2025	31/08/2025	31/12/2154
1641984	S	Pierre Hezi	Started	26/07/2025	31/12/2154	31/12/2154
aaa	aaaa	Benjamin Martin	Scheduled	24/07/2025	31/12/2154	31/12/2154
acc	accountnat	Ted Howard	Started	28/09/2025	09/10/2025	29/10/2025
Consulting	Consultant	Jacob Robinson	Started	01/10/2017	31/12/2154	31/12/2154
hosam	hosam	Ted Howard	Started	25/07/2025	30/07/2025	30/07/2025
Hr	Hr manager	Reina Cabatana	Scheduled	29/07/2025	31/07/2025	22/10/2025
hr project	mang	khalid mohamed alkba	Scheduled	24/07/2025	31/12/2154	31/12/2154
HR Mans	HRRRR Mans	Charlie Carson	Started	26/07/2025	31/07/2025	31/07/2025
HR Test 0	HR Test 0	Jodi Christiansen	Scheduled	26/07/2025	31/12/2154	31/12/2154
HRM	HRM	Charlie Carson	Started	13/08/2025	31/12/2154	31/12/2154
HSE Tech	HSE Tech	Sara Bowman	Started	16/08/2025	20/08/2025	21/08/2025
Machine Op	Machine Operator	Jacob Robinson	Finished	01/08/2015	01/09/2015	01/10/2015
Machine Oper	Machine Operator	Jacob Robinson	Started	05/09/2017	31/12/2154	31/12/2154
Marketing	Marketing	Jodi Christiansen	Started	24/07/2025	31/12/2154	31/12/2154
MarketingExec	Marketing Executive	Jacob Ray	Started	10/12/2017	31/12/2154	31/12/2154
marketinggg	market team	Sara Thomas	Scheduled	31/07/2025	31/12/2154	31/12/2154
Msders 04	Graduation Project Test	Charlie Carson	Finished	06/11/2025	31/12/2154	31/12/2154
New project	Testing Recruitment	Reda Adel Ahmed	Started	04/11/2025	31/12/2154	31/12/2154
New Project1	Testing project 1234	Ted Howard	Scheduled	05/11/2025	31/12/2154	31/12/2154
Ops	Operations Manager	Habeba Usama Abdullah	Scheduled	30/07/2025	05/08/2025	06/08/2025
process safety	process safety	Ted Howard	Started	26/07/2025	28/07/2025	31/07/2025
Project Z	Rec Project test	Ricardo Acosta	Started	13/08/2025	22/08/2025	31/08/2025
Rec. Acc. Proj.	Receivable Accountant Re...	Mohammad AbdelSattar ...	Started	10/11/2025	20/11/2025	30/11/2025

Finance and Operations | Human resources > Recruitment > Recruitment projects > Recruitment projects

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← | ≡ | Edit | + New | Delete | Applications | **Media** | **Developments** | **Job ad** | Print accommodations | Recruitment project status | Options | 🔎

Recruitment projects | Standard view ↴

Rec. Acc. Proj. : Recievable Accountant Recruitment Project

Human resources > Recruitment > Recruitment projects > Recruitment projects

Details

OVERVIEW (1) **Recruiter** (3) **Job** **DATES** **Close date**
Recruitment project **Mohammad AbdelSattar Zay...** Requisition approved on **30/11/2025**
Rec. Acc. Proj. Project status **Started** Number of openings **01/11/2025**
Description **Started** Open date **10/11/2025**
Recievable Accountant Recrui... **Accountant 4** Application deadline **20/11/2025**

ORGANISATION **CONTACTS** **Display on employee self service**
Department **Hiring manager** **Yes**
Accounting Department **Omnia Ashraf Mohamed**

Alternative contact **Nada Mohamed Saeed**

2

Edit New Delete Options

Human resources > Recruitment > Recruitment projects > Recruitment projects

Filter

Media	Description	Media type
LinkedIn	LinkedIn	Internet

Standard view
Media

Media	Description
LinkedIn	LinkedIn

Media type
Internet

1

Supplier information

Supplier account

Address

Contact information

Telephone

01030850535

Mobile phone

01030850515

Fax

Telex number

Extension

Internet address

Language

Email

nany.m@tgates.net

[https://www.linkedin.com/in/...](https://www.linkedin.com/in/)

ar-eg

← | Edit New Delete Options Search

Human resources > Recruitment > Recruitment projects > Recruitment projects

Project media | Rec. Acc. Proj. : Recievable Accountant Recruitment Project

Standard view

Filter

Media	Description	Start date	End date	⋮
LinkedIn	LinkedIn	08/11/2025	31/12/2025	

← | Edit | Options | 🔍

Human resources > Recruitment > Recruitment projects > Recruitment projects



Rec. Acc. Proj.: Receivable Accountant Recruitment Project | Standard view ▾

Job ads

Receivable Accountant Job Vacancy

Available Job Vacancies are available at our company.

It is a fulltime job at the company office.

Accounting Grade is a must.

CPA, CMA, CA certificates are recommended but not a must.

Benefits:

- 2 days off.
- Social and medical ensurane.
- Competitive salary.

Skills needed:

- Mathematical, analytical and financial skills.
- Budgeting skills.
- Computer skills.
- Time Management.

Areas of responsibility of the job:

- Financial reporting
- Budget control
- Tax management
- Auditing and compliance
- Financial analysis

Tasks to be done:

- Record transactions
- Prepare statements & taxes
- Manage budgets
- Handle payments
- Audit accounts

CVs to be sent to e-mail

Finance and Operations Human resources > Recruitment > Recruitment projects > Recruitment projects

USMF ? AE

Common
Consolidations
Cost accounting
Cost management
Credit and collections
Demo data
Engineering change management
Expense management
Fixed assets
Fleet management
General ledger
Global stock accounting
HR business process
Human resources
Landed cost
Leave and absence
Master planning
NextGen Payroll
Organisation administration
Payroll
Pricing management
Procurement and sourcing
Product information

Applications Media Developments Job ad Print accommodations **Recruitment project status** Options

Recruitment projects | Standard view

Rec. Acc. Proj. : Recivable Accountant Recruitment Project

Details

OVERVIEW		Recruiter	Job	DATES	Close date
Recruitment project	Rec. Acc. Proj.	Mohammad AbdelSattar Zayed	Accountant 4	Requisition approved on 01/11/2025	30/11/2025
Description	Recivable Accountant Recruit...	Cancelled	Number of openings 2	Open date 10/11/2025	Estimated start date
ORGANISATION		Department	CONTACTS	Application deadline 20/11/2025	Display on employee self service <input checked="" type="checkbox"/> Yes
		Accounting Department	Hiring manager Omnia Ashraf Mohamed Alternative contact Nada Mohamed Saeed		

Schedule
Start
Finish
Cancel

Human Resources < Recruitment < Recruitment project

≡ ⚙

Common
Consolidations
Cost accounting
Cost management
Credit and collections
Demo data
Engineering change management
Expense management
Fixed assets
Fleet management
General ledger
Global stock accounting
HR business process
Human resources
Landed cost
Leave and absence
Master planning
NextGen Payroll
Organisation administration
Payroll
Pricing management
Procurement and sourcing

Expand all Collapse ...

> Workspaces Mass hire projects report
> Workers > Competencies
> Positions > Performance
> Jobs > Courses
> Departments > Task management
> Benefits > Business process
> Compensation > User defined links
> Absence > Setup
▼ Recruitment
> Recruitment projects
> Applications
▼ Applicants
Applicant interviews
Applicant status report
Applicant curriculum vitae report
> Communication
> Skill analysis
Accommodation list
Mass hire projects

Human Resources < Recruitment < Applicants

Finance and Operations Human resources > Recruitment > Applicants > Applicants

USMF ? AE

Consolidations Cost accounting Cost management Credit and collections Demo data Engineering change management Expense management Fixed assets Fleet management General ledger Global stock accounting HR business process Human resources Landed cost Leave and absence Master planning NextGen Payroll Organisation administration Payroll Pricing management Procurement and sourcing Product information management

[Save](#) [+ New](#) [Delete](#) Applications Interviews Competencies Related information Options

Applicant | Standard view ^

000224 : Ahmed Adel Ahmed Adel

Human Resources < Recruitment < Applicants

General

IDENTIFICATION

Applicant 000224	Surname prefix Sr.	Known as	Phonetic last	Total applications 0
Applicant type External applicant	Surname Ahmed Adel	Professional title	Display as FirstMiddleLast	Future consideration
Personal title Mr.	Personal suffix Sr.	Professional suffix		Previous employee
First name Ahmed	Search name Ahmed Adel	Phonetic first	Current job title sr accountant	SKILL MAPPING
Middle name Adel	NAME DETAILS	Phonetic middle	Highest degree Bachelor	Include in skill mapping <input checked="" type="checkbox"/> Yes
	Initials		Number of applications 0	Reason code

[+ Show fewer fields](#)

Addresses

+ Add Map More options ^

Name or description	Address	Purpose	Primary	⋮
We didn't find anything to show here.				

Save + New Delete Applications Interviews Competencies Related information Options

000224 : Ahmed Adel Ahmed Adel

Human Resources < Recruitment < Applicants

Addresses

+ Add Edit Map More options

Name or description	Address	Purpose	Primary
---------------------	---------	---------	---------



We didn't find anything to show here.

Contact information

+ Add Remove Advanced

Standard view ▾
New address

Location ID

000006873

Name or description

Hadayek-Helwan

Purpose

Recruit

Country/region

EGY

Postcode

Street

City

CAIRO

State

CAI

Primary

Yes

Private

Yes

Primary for country/region

Yes

OK Cancel

Finance and Operations Human resources > Recruitment > Applicants > Applicants

USMF ? AE

Consolidations
Cost accounting
Cost management
Credit and collections
Demo data
Engineering change management
Expense management
Fixed assets
Fleet management
General ledger
Global stock accounting
HR business process

Human resources
Landed cost
Leave and absence
Master planning
NextGen Payroll
Organisation administration
Payroll
Pricing management
Procurement and sourcing
Product information management

Applicant | Standard view Applications Interviews Competencies Related information Options

000224 : Ahmed Adel Ahmed Adel

Human Resources < Recruitment < Applicants

Contact information

+ Add Advanced

	Description	Type	Contact number/address	Extension	Primary	Private	
	0100024566	Phone			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Personal information

PERSONAL DETAILS COUNTRY/REGION MILITARY SERVICE MORE INFORMATION

Birth date: 06/11/1996	Gender: Male	Citizenship country/region:	Veteran status: اذا الخدمة العسكرية	Identification numbers
Ethnic origin:	Applicant's marital status: Single	Native language: Arabic		Screenings

Finance and Operations Human resources > Recruitment > Applicants > Applicants

USMF ? AE

Consolidations Cost accounting Cost management Credit and collections Demo data Engineering change management Expense management Fixed assets Fleet management General ledger Global stock accounting HR business process Human resources Landed cost Leave and absence Master planning NextGen Payroll Organisation administration Payroll Pricing management Procurement and sourcing Product information management

Competencies

Skills Tests Project experience Professional experience Certificates Positions of trust Education Courses

IDENTIFICATION

First name: Ahmed	Personal suffix: Sr.
Middle name: Adel	Search name: Ahmed Adel
Personal title: Acc	Surname: Ahmed Adel
Display as: FirstMiddleLast	

NAME DETAILS

APPLICANT INFORMATION

Total applications: 0
Current job title: sr accountant
Highest degree: Bachelor
Number of applications: 0

SKILL MAPPING

Include in skill mapping: Yes

OTHER INFORMATION

Reason code:

Address books:

Human Resources < Recruitment < Applicants

Addresses

Contact information

Personal information

Finance and Operations Human resources > Recruitment > Applicants > Applicants

USMF ? AE

Applications Interviews Competencies Related information Options

Applicant | Standard view ▾

000225 : Hosam Gohary El-Gohary

Human Resources < Recruitment < Applicants

General

IDENTIFICATION	Middle name Gohary	Search name Hosam Gohary El-Gohary	Highest degree	SKILL MAPPING
Applicant 000225	Surname prefix Acc	Display as FirstMiddleLast	Number of applications 0	Include in skill mapping <input checked="" type="checkbox"/> Yes
Applicant type External applicant	Surname El-Gohary	Personal suffix Sr.	Total applications 0	Reason code
Personal title Mr.	Personal suffix	Current job title	Future consideration	OTHER INFORMATION
First name Hosam			Previous employee	Address books

Addresses

+ Add More options ▾

Name or description	Address	Purpose	Primary
El-maadi	CAIRO CAI EGY	Recruit	Yes

Finance and Operations Human resources > Recruitment > Applicants > Applicants

USMF ? AE

Related information

Identification References
Screenings Image
Accommodations

Human Resources < Recruitment < Applicants

IDENTIFICATION

Applicant 000225	Middle name Gohary	Search name Hosam Gohary El-Gohary	Highest degree
Applicant type External applicant	Surname prefix Acc	Display as FirstMiddleLast	Number of applications 0
Personal title Mr.	Surname El-Gohary	APPLICANT INFORMATION	Total applications 0
First name Hosam	Personal suffix Sr.	Current job title	Future consideration

NAME DETAILS

SKILL MAPPING

Include in skill mapping Yes
Reason code

OTHER INFORMATION

Address books

Show more fields

Addresses

+ Add Map More options

Name or description	Address	Purpose	Primary
El-maadi	CAIRO CAI EGY	Recruit	Yes

Finance and Operations Human resources > Recruitment > Applicants > Applicants

USMF ? AE

Consolidations Cost accounting Cost management Credit and collections Demo data Engineering change management Expense management Fixed assets Fleet management General ledger Global stock accounting HR business process **Human resources** Landed cost Leave and absence Master planning NextGen Payroll Organisation administration Payroll Pricing management Procurement and sourcing Product information management

Applicant | Standard view ▾

000226 : Cassie Hicks

Human Resources < Recruitment < Applicants

General

IDENTIFICATION

Applicant	000226	Middle name	
Applicant type	External applicant	Surname prefix	acc
Personal title	Mrs.	Surname	Hicks
First name	Cassie	Personal suffix	Sr.

NAME DETAILS

Display as	FirstMiddleLast
------------	-----------------

APPLICANT INFORMATION

Current job title	
-------------------	--

SKILL MAPPING

Include in skill mapping Yes

Reason code

OTHER INFORMATION

Address books

Show more fields

Addresses

+ Add Map More options ▾

Name or description	Address	Purpose	Primary
october	CAIRO CAI EGY	Recruit	Yes

Finance and Operations Human resources > Recruitment > Applicants > Applicants

USMF ? AE

Consolidations
Cost accounting
Cost management
Credit and collections
Demo data
Engineering change management
Expense management
Fixed assets
Fleet management
General ledger
Global stock accounting
HR business process
Human resources
Landed cost
Leave and absence
Master planning
NextGen Payroll
Organisation administration
Payroll
Pricing management
Procurement and sourcing
Product information management

Save Applications Interviews Competencies Related information Options

Competencies

Skills Tests Project experience
Professional experience Certificates Positions of trust
Education Courses

Human Resources < Recruitment < Applicants

Applicant | Standard view

	Name	Applicant	Applicant type	Highest degree
	Cassie Hicks	000226	External applicant	Bachelor
	Hosam Gohary El-Gohary	000225	External applicant	Bachelor
	Ahmed Adel Ahmed Adel	000224	External applicant	Bachelor
	Adel	000223	External applicant	
	A B C	000167	External applicant	
	abdelmaksoud mohamed	000093	External applicant	Bachelor
	Adam Carter	000050	Employee	
	ahmed mohamed ali	000183	External applicant	
	Ahmed Mahmoud	000058	Employee	Bachelor
	ahmed MAHMOUD SAYED	000163	External applicant	Bachelor
	Aidan Delaney	000001	External applicant	High School
	Andrew Sullivan	000013	External applicant	Associate
	Bill Malone	000027	Employee	Bachelor
	Bjarne Riis	000002	External applicant	High School
	Brian Teutsch	000004	External applicant	Associate
	David Strome	000009	Employee	Bachelor
	Diane Glimp	000018	External applicant	Master
	Don Roessler	000006	External applicant	Bachelor
	Eva Corets	000005	External applicant	Associate

Finance and Operations Human resources > Recruitment > Applications > Applications

USMF ?

Cash and bank management
Checks
Common
Consolidations
Cost accounting
Cost management
Credit and collections
Demo data
Engineering change management
Expense management
Fixed assets
Fleet management
General ledger
Global stock accounting
HR business process
Human resources
Landed cost
Leave and absence
Master planning
NextGen Payroll
Organisation administration
Payroll

Expand all Collapse ...

- > Workspaces Skill analysis
- > Workers Accommodation list
- > Positions Mass hire projects
- > Jobs Mass hire projects report
- > Departments Competencies
- > Benefits Performance
- > Compensation Courses
- > Absence Task management
- > **Recruitment**
 - > Recruitment projects
 - > **Applications**
 - Applications
 - Application inbox
 - Application statistics
 - > Applicants
 - Applicants
 - Applicant interviews
 - Applicant status report
 - Applicant curriculum vitae report
 - > Communication
- > Setup

Human Resources < Recruitment < Applications Received

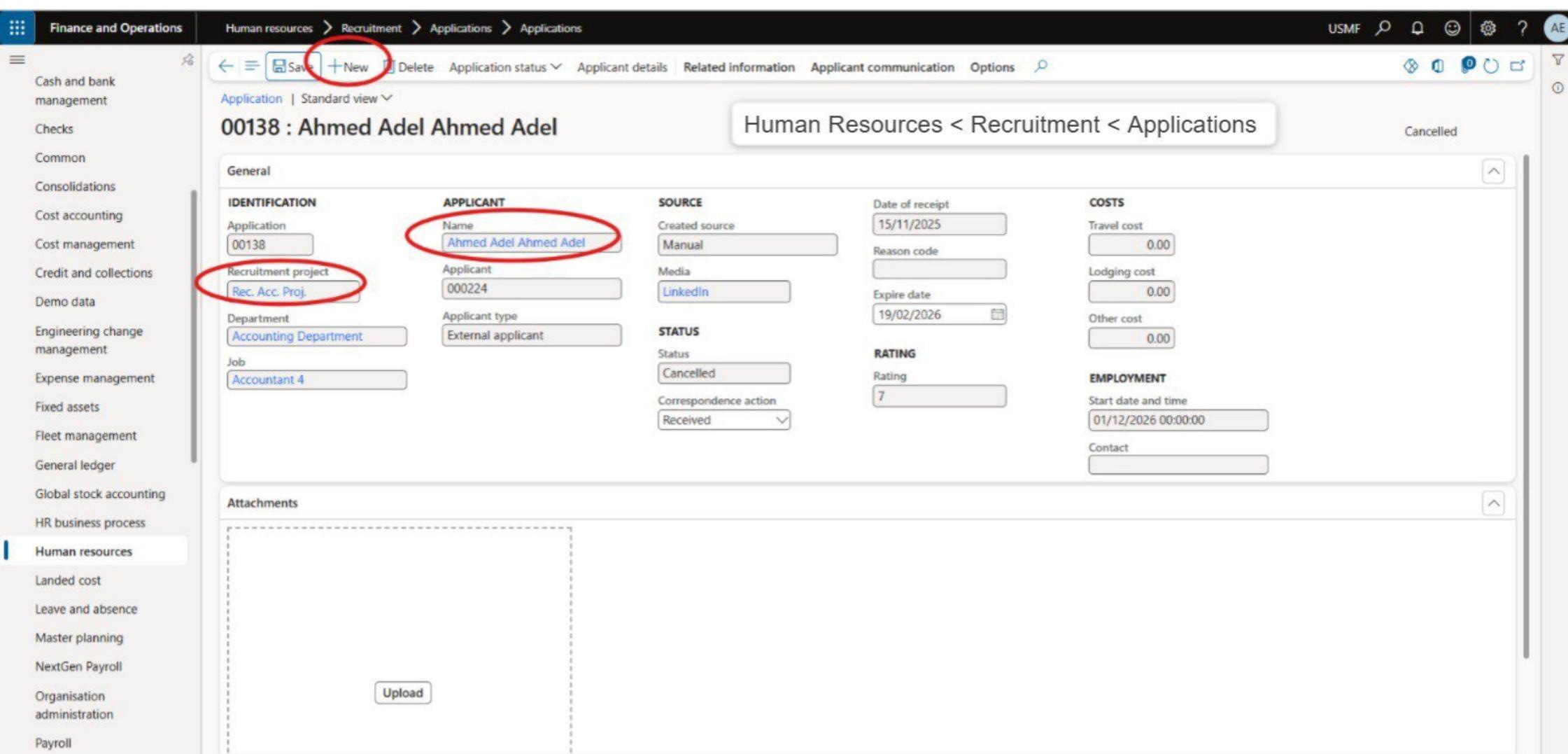
Date of receipt: 21/11/2025 **COSTS**
Reason code: Travel cost: 0.00

Expire date: 19/02/2026 **Lodging cost**: 0.00

Other cost: 0.00

RATING
Rating: Not selected

EMPLOYMENT
Start date and time:
Contact:



Finance and Operations Human resources > Recruitment > Applications > Applications

USMF ? AE

Cash and bank management
Checks
Common
Consolidations
Cost accounting
Cost management
Credit and collections
Demo data
Engineering change management
Expense management
Fixed assets
Fleet management
General ledger
Global stock accounting
HR business process
Human resources
Landed cost
Leave and absence
Master planning
NextGen Payroll
Organisation administration
Payroll

Application status Application details Related information Applicant communication Options

Application Standard view 00138 : Ahmed Adel A

Human Resources < Recruitment < Applications Received

General

IDENTIFICATION	SOURCE	COSTS
Application 00138 Recruitment project Rec. Acc. Proj. Department Accounting Department Job Accountant 4	Created source Manual Media LinkedIn	Date of receipt 15/11/2025 Reason code Interview Expire date 19/02/2026
STATUS	RATING	EMPLOYMENT
Status Received Correspondence action Received	Rating 7	Start date and time 01/12/2026 00:00:00 Contact

Attachments

Upload

The screenshot shows the Microsoft Dynamics 365 Human Resources application interface. The main title bar indicates the path: Human resources > Recruitment > Applications > Applications. The top navigation bar includes standard icons for Save, New, Delete, and a dropdown for Application status, which is currently set to 'Received' and has a red circle around it. Below the navigation is a toolbar with various icons for search, notifications, settings, and help. On the left, a vertical navigation menu lists various modules under 'Finance and Operations' and 'Human resources'. The current module is 'Human resources', which is highlighted with a blue background. The main content area displays an application record for candidate 'Ahmed Adel A' with ID '00138'. The record is in 'Standard view'. The application form is divided into sections: General, Identification, Source, Costs, Status, Rating, Employment, and Attachments. The 'Status' section is expanded, showing the current status as 'Received' and a dropdown for 'Correspondence action' also set to 'Received'. The 'Rating' section shows a rating of 7. The 'Employment' section shows a start date of 01/12/2026 at 00:00:00. The 'Attachments' section is currently empty. A tooltip 'Human Resources < Recruitment < Applications Received' is visible above the application form.

Finance and Operations Human resources > Recruitment > Applications > Applications

USMF ?

Cash and bank management Checks Common Consolidations Cost accounting Cost management Credit and collections Demo data Engineering change management Expense management Fixed assets Fleet management General ledger Global stock accounting HR business process **Human resources** Landed cost Leave and absence Master planning NextGen Payroll Organisation administration Payroll

Save + New Delete Application status ▾ Applicant details Related information Applicant communication Options

Application | Standard view 00139 : Cassie Hicks Received

Human Resources < Recruitment < Applications Received

General IDENTIFICATION Application 00139 Recruitment project Rec. Acc. Proj. Department Accounting Department Job Accountant 4

Source Date of receipt 17/11/2025 Created source Manual Reason code Inexperienced Expire date 19/02/2026

Status Status Received Correspondence action Interview

Costs Travel cost 0.00 Lodging cost 0.00 Other cost 0.00

Rating Rating 5

Employment Start date and time Contact

Attachments Upload

The screenshot shows the Microsoft Dynamics 365 Finance and Operations application interface for managing recruitment applications. The main title bar indicates the path: Human resources > Recruitment > Applications > Applications. The top navigation bar includes Save, + New, Delete, Application status (with a dropdown menu circled in red showing options like Received, Confirmed, Interview, and Rejection), Applicant details, Related information, Applicant communication, Options, and a search icon. The left-hand navigation pane is collapsed, showing various financial and HR modules. The current page is titled "Human Resources < Recruitment < Applications" and displays a single application record for "Cassie Hicks" with ID "00139". The application form is divided into sections: General (Identification, Source, Status, Costs, Rating, Employment), IDENTIFICATION (Application number, Recruitment project, Department, Job), and Attachments (with an Upload button). The "Status" section in the General tab has a dropdown menu open, with "Rejection" highlighted and circled in red.

Finance and Operations Human resources > Recruitment > Applications > Applications

USMF ?

Cash and bank management Checks Common Consolidations Cost accounting Cost management Credit and collections Demo data Engineering change management Expense management Fixed assets Fleet management General ledger Global stock accounting HR business process Human resources Landed cost Leave and absence Master planning NextGen Payroll Organisation administration Payroll

Save + New Delete Application status

Application | Standard view

00140 : Hosam Gohar

Received

Confirmed

Interview

Rejected

Cancelled

Hire new worker

Change position

Applicant

000225

Applicant type

External applicant

Department

Accounting Department

Job

Accountant 4

SOURCE

Created source

Manual

Media

DATE OF RECEIPT

18/11/2025

Reason code

Expire date

19/02/2026

STATUS

Status

Received

Correspondence action

Received

RATING

Rating

6

COSTS

Travel cost

0.00

Lodging cost

0.00

Other cost

0.00

EMPLOYMENT

Start date and time

Contact

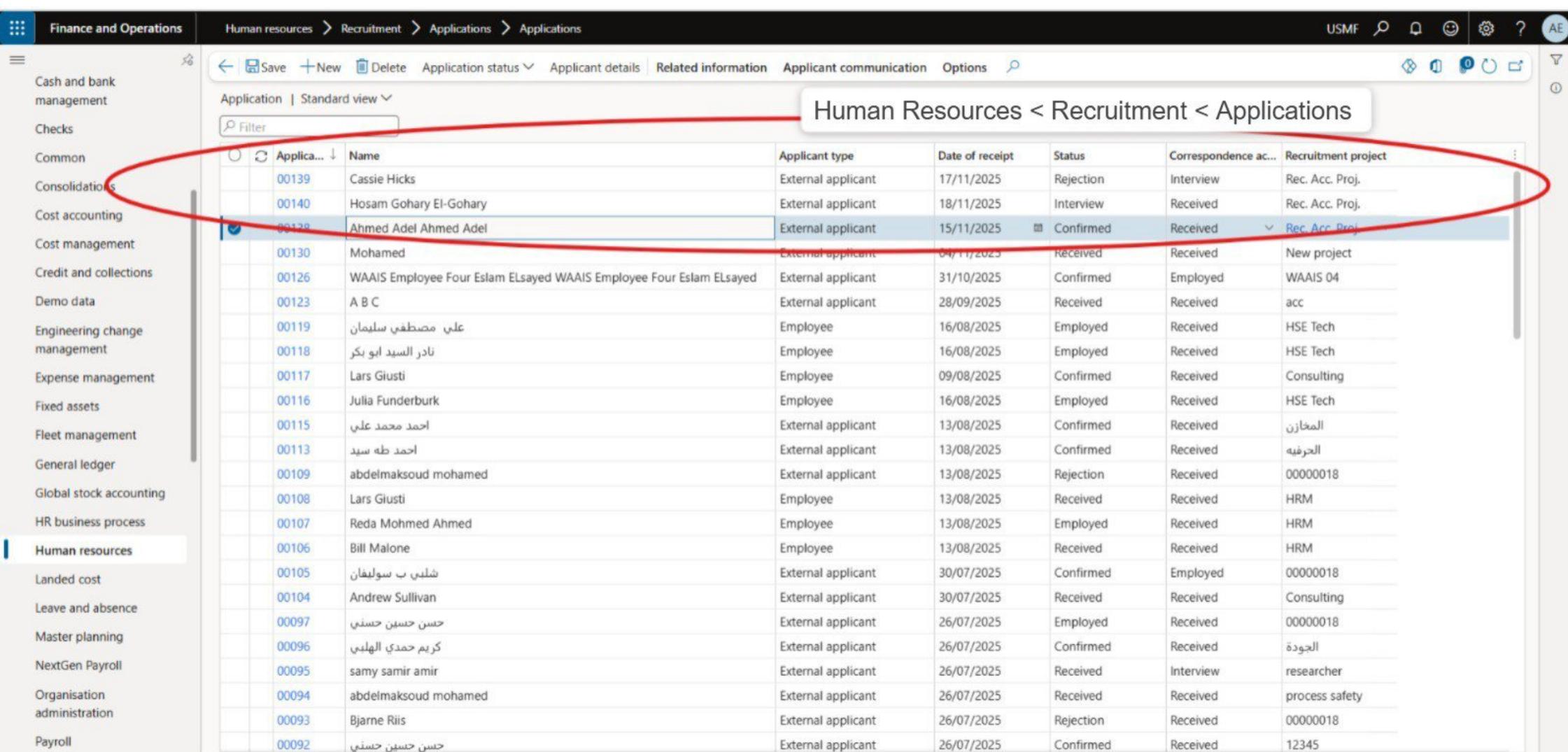
Attachments

Upload

Human Resources < Recruitment < Applications

Received

Human Resources < Recruitment < Applications



Finance and Operations Human resources > Recruitment > Applications > Applications

USMF ? AE

Cash and bank management
Checks
Common
Consolidations
Cost accounting
Cost management
Credit and collections
Demo data
Engineering change management
Expense management
Fixed assets
Fleet management
General ledger
Global stock accounting
HR business process
Human resources
Landed cost
Leave and absence
Master planning
NextGen Payroll
Organisation administration
Payroll

Application status Applicant details Related information Applicant communication Options

Standard view Application 00138 : Ahmed Adel A Confirmed

Hire new worker

Human Resources < Recruitment < Applications

General

IDENTIFICATION	SOURCE	COSTS
Application 00138	Created source Manual	Travel cost 0.00
Recruitment project Rec. Acc. Proj.	Media LinkedIn	Lodging cost 0.00
Department Accounting Department	STATUS	Other cost 0.00
Job Accountant 4	Status Confirmed	
	Correspondence action Received	

RATING

EMPLOYMENT	
Rating 7	Start date and time 01/12/2026 00:00:00
Contact	

Attachments

Upload

Finance and Operations Human resources > Recruitment > Applications > Applications

Application Standard view

00138 : Ahmed Adel Ahmed Adel

General

IDENTIFICATION	APPLICANT	SOURCE
Application 00138	Name Ahmed Adel Ahmed Adel	Created source Manual
Recruitment project Rec. Acc. Proj.	Applicant 000224	Media LinkedIn
Department Accounting Department	Applicant type External applicant	
Job Accountant 4		
		Status Confirmed
		Correspondence action Received

Attachments

Human Resources < Recruitment < Applications

Upload

Hire new worker

Standard view ▾

Name

First name Ahmed	Middle name Adel	Surname Ahmed Adel
---------------------	---------------------	-----------------------

Details

Legal entity usmf	National ID 6545855656565	Employment category Level 6
Personnel number 111000	Employment start date 01/12/2026 00:00:00	Employment type Full Time
Worker type Employee	Employment end date 31/12/2027 23:59:59	Termination reason
	Last date worked 31/12/2027 23:59:59	

Position details

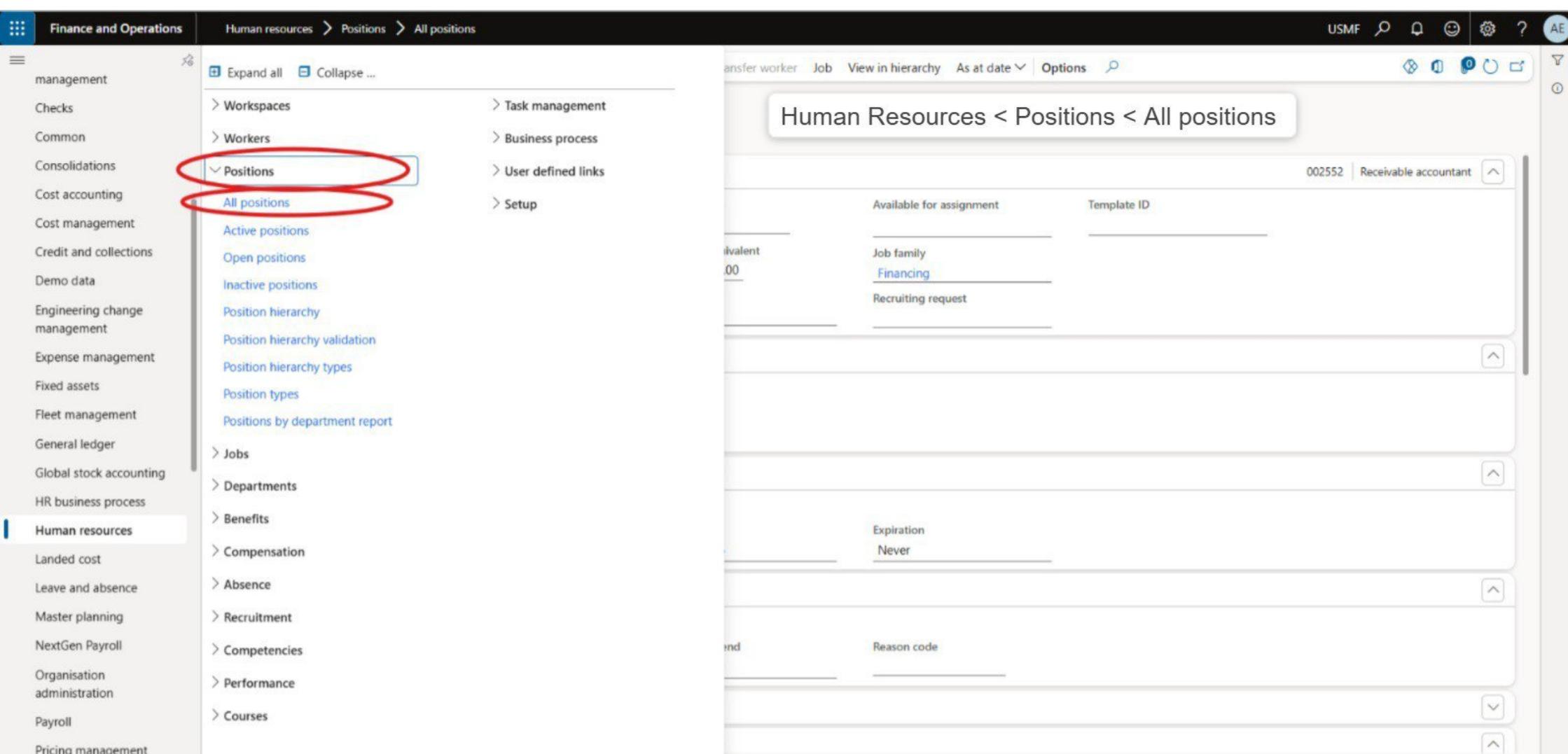
Position 002552	Position title Accountant	Assignment end 31/12/2027 23:59:59
Make primary <input checked="" type="checkbox"/> Yes	Assignment start 01/12/2026 00:00:00	

Onboarding checklists

AVAILABLE	SELECTED
<input type="radio"/> Checklist	<input type="radio"/> Checklist
<input type="radio"/> US Only	<input type="radio"/> US Only
Executives	Executives

Hire

Hire and add details Cancel



Finance and Operations Human resources > Positions > All positions USMF 🔍 🗃 🌐 ? AE

management Checks Common Consolidations Cost accounting Cost management Credit and collections Demo data Engineering change management Expense management Fixed assets Fleet management General ledger Global stock accounting HR business process **Human resources** Landed cost Leave and absence Master planning NextGen Payroll Organisation administration Payroll Pricing management

All positions Standard view * Human Resources < Positions < All positions

Position	Description	Worker	Job	Job level	Department	Reports to position	Job family	Recruiting :
002551	DCEO ONL3_ERP8_G1	هنا عابد الرويني	DCEO ONL3_ERP8_G1		DCEO ONL3_ERP8_G1 Com...		High Management	
002552	Receivable accountant		Accountant 4	Professional	Accounting Department	000100	Financing	
002553	IT Engineer B ONL3_ERP_G1	Lina Fares Mondy	IT Engineer B ONL3_ERP_G1		IT ONL3_ERP8_G1		IT Sys. ELG1	
002554	IT Technician A ONL3_ERP_G1	رُوف سامر انطوان	IT Technician A ONL3_ERP_G1		IT ONL3_ERP8_G1	002551	IT Sys. ELG1	
002556	Accountant		Accountant		Accounting Basma			
002557	G3 Accountant	G3 Maiar Adel	Accountant		Accounting Department			
002558	G3 HR Payroll	G3 Amr Momo	CAI3 HR Payroll		Berlin HQ			
002559	G3 IT Manager	G3 Sahar Mostafa	IT Manager		IT			

of rows
8 rows

Finance and Operations Human resources > Positions > All positions

[Edit](#) [New](#) [Delete](#) [Copy position](#) [Changes timeline](#) [Hire](#) [Transfer worker](#) [Job](#) [View in hierarchy](#) [As at date](#) [Options](#)

All positions | Standard view

002552 : Receivable accountant

Human Resources < Positions < All positions

General				
Position 002552	Job level Professional	Position type Full-time	Available for assignment	Template ID
Description Receivable accountant	Department Accounting Department	Full-time equivalent 1.00	Job family Financing	
Job Accountant 4	Title Accountant	Location	Recruiting request	

Position duration

+ New [Edit](#) [Retire](#)

Activation 01/11/2025	Retirement Never
--------------------------	---------------------

Reports to position

+ New [Edit](#) [End](#)

Reports to position 000100	Worker Phyllis Harris	Effective 01/11/2025	Expiration Never
-------------------------------	--------------------------	-------------------------	---------------------

Worker assignment

+ New [Edit](#) [End](#)

Worker Payroll	Assignment start	Assignment end	Reason code
Relationships			

Standard view [Create a worker assignment](#)

Assignment start

Assignment end

Position

Worker

Reason code

Make primary Yes

Create worker assignment [Cancel](#)

Finance and Operations Human resources > Positions > All positions

All positions | Standard view

002552 : Receivable accountant

Human Resources < Positions < All positions

General

Position 002552	Job level Professional	Position type Full-time	Available for assignment	Template ID
Description Receivable accountant	Department Accounting Department	Full-time equivalent 1.00	Job family Financing	
Job Accountant 4	Title Accountant	Location	Recruiting request	

Position duration

+ New Edit Retire

Activation 01/11/2025	Retirement Never
--------------------------	---------------------

Reports to position

+ New Edit End

Reports to position 000100	Worker Phyllis Harris	Effective 01/11/2025	Expiration Never
-------------------------------	--------------------------	-------------------------	---------------------

Worker assignment

+ New Edit End

Worker Payroll	Assignment start	Assignment end	Reason code
Relationships			

Standard view Create a worker assignment

Assignment start
21/11/2025 00:00:00

Assignment end
30/11/2026 23:59:59

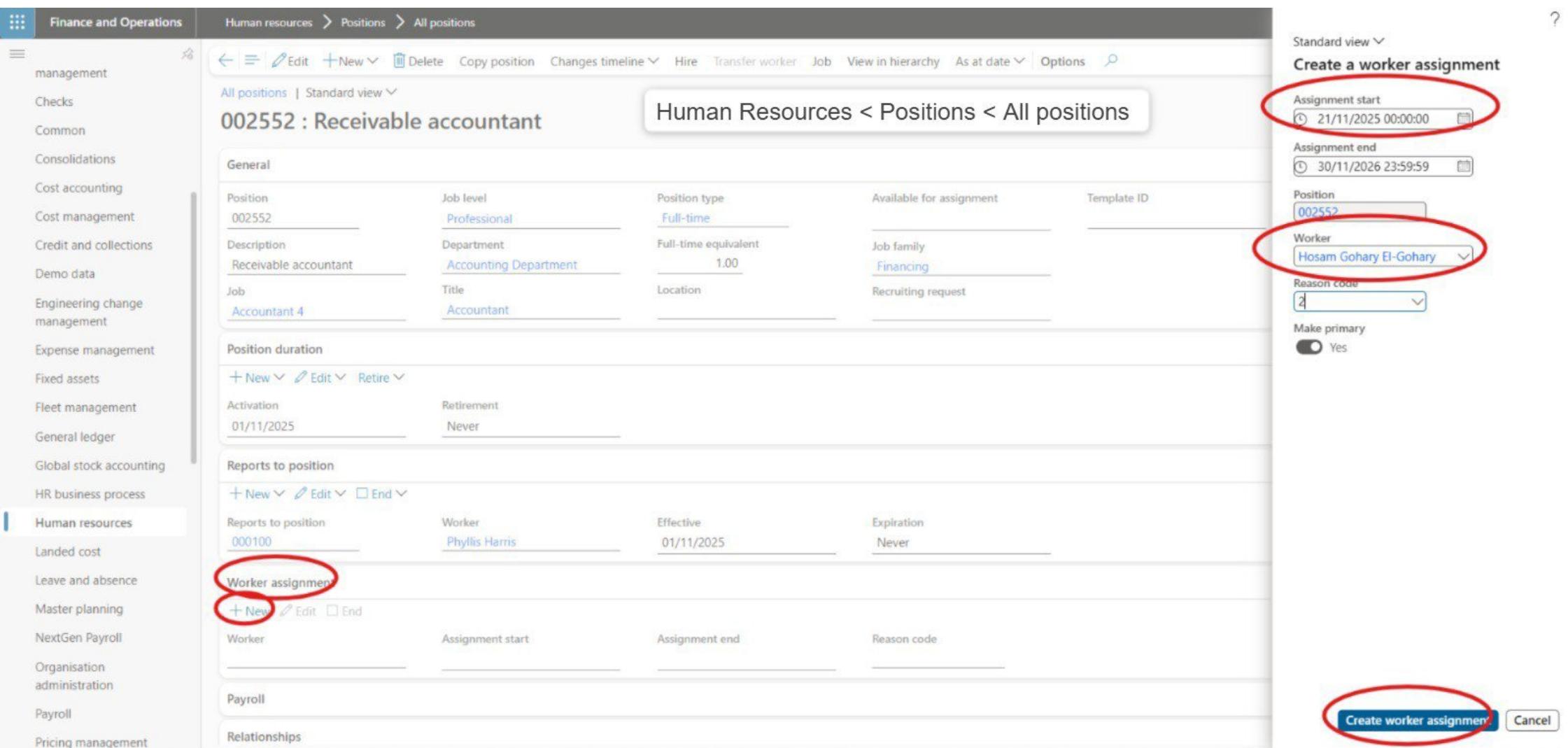
Position
002552

Worker
Hosam Gohary El-Gohary

Reason code
2

Make primary
 Yes

Create worker assignment Cancel



Finance and Operations Human resources > Positions > All positions USMF ?

management Checks Common Consolidations Cost accounting Cost management Credit and collections Demo data Engineering change management Expense management Fixed assets Fleet management General ledger Global stock accounting HR business process Human resources Landed cost Leave and absence Master planning NextGen Payroll Organisation administration Payroll Driving management

All positions | Standard view ▾

002552 : Receivable accounttant

Human Resources < Positions < All positions

002552 | Receivable accounttant

General				
Position 002552	Job level Professional	Position type Full-time	Available for assignment	Template ID
Description Receivable accounttant	Department Accounting Department	Full-time equivalent 1.00	Job family Financing	
Job Accountant 4	Title Accountant	Location	Recruiting request	
Position duration				
+ New ▾ / Edit ▾ / Retire ▾				
Activation 01/11/2025	Retirement Never			
Reports to position				
+ New ▾ / Edit ▾ / End ▾				
Reports to position 000100	Worker Phyllis Harris	Effective 01/11/2025	Expiration Never	
Worker assignment				
+ New ▾ / Edit ▾ / End ▾				
Worker Hosam Gohary El-Gohary	Assignment start 21/11/2025	Assignment end 30/11/2026	Reason code 2	
Payroll				
Relationships				

Finance and Operations Human resources > Positions > All positions USMF ?

management Checks Common Consolidations Cost accounting Cost management Credit and collections Demo data Engineering change management Expense management Fixed assets Fleet management General ledger Global stock accounting HR business process Human resources Landed cost Leave and absence Master planning NextGen Payroll Organisation administration Payroll Pricing management

All positions Standard view *

Human Resources < Positions < All positions

Position	Description	Worker	Job	Job level	Department	Reports to position	Job family	Recruiting :
002551	DCEO ONL3_ERP8_G1	دكتور عصام عباس	DCEO ONL3_ERP8_G1	Executive	DCEO ONL3_ERP8_G1 Comm...		High Management	
002552	Receivable accountant	Hosam Gohary El-Gohary	Accountant 4	Professional	Accounting Department	000100	Financing	
002553	IT Engineer B ONL3_ERP8_G1	Lina Rares Mandy	IT Engineer B ONL3_ERP8_G1	IT	IT ONL3_ERP8_G1		IT Sys. ELG1	
002554	IT Technician A ONL3_ERP8_G1	رئوف سامر انطوان	IT Technician A ONL3_ERP8_G1	IT	IT ONL3_ERP8_G1	002551	IT Sys. ELG1	
002556	Accountant		Accountant	Accountant	Accounting Basma			
002557	G3 Accountant	G3 Maiar Adel	Accountant	Accountant	Accounting Department			
002558	G3 HR Payroll	G3 Amr Momo	CAI3 HR Payroll	HR	Berlin HQ			
002559	G3 IT Manager	G3 Sahar Mostafa	IT Manager	IT				

of rows
8 rows

Finance and Operations Human resources > Task management > Onboarding setup

USMF 🔍 🌐 🎯 ? AE

Expand all Collapse ...

> Workspaces
 > Workers
 > Positions
 > Jobs
 > Departments
 > Benefits
 > Compensation
> Absence
> Recruitment
> Competencies
> Performance
> Courses
> Task management
Onboarding setup Onboarding checklists
 Offboarding setup
 Offboarding checklists
 Transitions setup
 Transition checklists
 Group assignment
 Calendar
 Business process
 User defined links
 Setup

Human Resources < Task management < Onboarding setup

Task management

A task is a specific piece of work or an action that someone must complete. You can reuse tasks and add them to one or more checklists.

Apply to checklists Edit Delete

	Description	Task group	Assignment type	Assigned to	Due date o...	Contact person	Task link	Ch:
Employee onboarding policy	Review discrimination policy	HR	Position	HR Assistant	5	Luke Alberts	Courses	
Employee training	Walk employee through onboarding	Training	Position	Training & Development...	3	Brooke Drynan	Personal information	
Employee drug policy	Review drug policy	HR	Position	HR Assistant	5	Luke Alberts		
Employee personal information	Enter personal information	Self-service	Employee self service	Employee self service	1	Brooke Drynan	Personal information	
Employee month check-in	Review the first month of employment	HR	Position	HR Assistant	30	Luke Alberts		
Employee domain	Join a company domain	IT	Position	IT Engineer	-3	Tim Litton		
Employee slate	Order name plate and office	Executive	Position	HR Generalist	-5	Brooke Drynan		
Employee contact	Provide new employee with contact information	HR	Position	HR Assistant	-10	Luke Alberts		
Employee cell phone	Order cell phone	Executive	Position	HR Assistant	-10	Luke Alberts		
Employee office	Submit request for office equipment	Executive	Position	HR Generalist	-4	Brooke Drynan		
Employee performance review	Discuss performance review with manager	HR	Position	HR Assistant	30	Luke Alberts		
Employee key card	Provide key card to employee	Facilities	Position	HR Assistant	0	Luke Alberts		
Employee list of direct reports	Provide a list of direct reports	Executive	Position	HR Assistant	0	Luke Alberts	Position hierarchy	
Employee parking permit	Provide parking permit to employee	Facilities	Position	HR Assistant	0	Luke Alberts		
Employee security codes	Provide building access codes	Facilities	Position	HR Assistant	0	Luke Alberts		
Employee benefits	Review your benefits for employee	Self-service	Employee self service	Employee self service	0	Brad Sutton	Benefits	
Employee dress code	Review dress code policy	HR	Position	HR Assistant	0	Luke Alberts		
Employee ESS Portal	Walk employee through ESS Portal	HR	Position	HR Assistant	3	Luke Alberts		
Employee pay schedule	Pay schedule review	Payroll	Position	Payroll Administrator	0	Brooke Drynan		
Employee compensation	Enter employee's compensation	HR	Position	Compensation & Benefits...	-3	Brooke Drynan	Fixed compensation	
Employee position description	Sign position description	HR	Position	HR Assistant	3	Luke Alberts		
Employee sign up for NEO	Sign employee up for NEO	HR	Position	Training & Development...	3	Grace Sturman	Courses	
Employee Task 001	Task 001		Worker	Lars Giusti	0			
Employee overview	Discuss procedures for start of employment	HR	Position	HR Assistant	0	Luke Alberts		
Employee welcome call	Call employee and welcome them	Manager	Manager	Manager	-5	Brooke Drynan		

Finance and Operations Human resources > Task management > Onboarding setup

Standard view > Onboarding setup

Human Resources < Task management < Onboarding setup

Task groups

- Task library (highlighted with a red box)
- Checklists

Task library

A task defines a specific piece of work or an action that someone must complete. You can reuse tasks and add them to one or more checklists.

+ New Apply to checklists Edit Delete

Task	Description	Task group	Assignment type	Assigned to	Due date o...	Contact person	Task link	Ch:
Activate voicemail	Overview of system	HR	Position	HR Assistant	0	Luke Alberts		
Assign executive sponsor	Assign an executive spon...	Executive	Position	HR Assistant	-3	Luke Alberts		
Assign role access	Assign roles for Dynamics...	IT	Position	IT Manager	-3	Brooke Drynan	Users	
Background check	Perform background chec...	HR	IT Position	HR Assistant	-11	Luke Alberts		
Benefits followup	Follow up with employee ...	Benefits	Position	Compensation & Benefits...	3	Luke Alberts		
Benefits session	Meet with employee to re...	Benefits	Position	Compensation & Benefits...	0	Brooke Drynan		
Business cards	Order business cards	HR	Position	HR Generalist	-5	Brooke Drynan		
Clean office	Submit request for office ...	Executive	Position	HR Generalist	-2	Brooke Drynan		
Code of Ethics policy	Review Code of Ethics pol...	HR	Position	HR Assistant	5	Luke Alberts		
Complete I-9	HR completes I-9	HR	Position	HR Assistant	0	Luke Alberts	I-9	
Complete W-4	Complete the W-4 for tax...	Self-service	Employee self service	Employee self service	0	Mia Vanclooster		
Computer setup	Get computer setup	IT	Position	IT Engineer	-3	Tim Litton		
Confirm offer	Confirm offer letter sent t...	HR	Position	HR Assistant	-10	Luke Alberts		
Confirm start date and time	Confirm arrival time and ...	HR	Position	HR Assistant	-3	Luke Alberts		
Connect to a printer	Connect to a local printer...	Multiple groups selected	Employee self service	Employee self service	-2	Tim Litton		
Create welcome guide	Create the employee's we...	Manager	Manager	Manager	-5	Brooke Drynan		
Discrimination policy	Review discrimination pol...	HR	Position	HR Assistant	5	Luke Alberts		
Discuss training	Walk employee through o...	Training	Position	Training & Development ...	3	Brooke Drynan	Courses	
Drug policy	Review drug policy	HR	Position	HR Assistant	5	Luke Alberts		
Enter personal information	Enter personal information	Self-service	Employee self service	Employee self service	1	Brooke Drynan	Personal information	
First month check-in	Review the first month of ...	HR	Position	HR Assistant	30	Luke Alberts		
Join a domain	Join a company domain	IT	Position	IT Engineer	-3	Tim Litton		
Name plate	Order name plate and offi...	Executive	Position	HR Generalist	-5	Brooke Drynan		
New employee contact	Provide new employee wi...	HR	Position	HR Assistant	-10	Luke Alberts		
Order cell phone	Order cell phone	Executive	Position	HR Assistant	-10	Luke Alberts		

Finance and Operations

Human resources > Task management > Onboarding setup

Standard view < Save Options ?

Onboarding setup

Task library

A task defines a specific piece of work or an action that someone must complete. You can reuse tasks and add them to checklists.

+ New Apply to checklists Edit Delete

Task	Description	Task group	Assignment
Activate voicemail	Overview of system	HR	Position
Assign executive sponsor	Assign an executive spon...	Executive	Position
Assign role access	Assign roles for Dynamics...	IT	Position
Background check	Perform background chec...	HR	Position
Benefits followup	Follow up with employee ...	Benefits	Position
Benefits session	Meet with employee to re...	Benefits	Position
Business cards	Order business cards	HR	Position
Clean office	Submit request for office ...	Executive	Position
Code of Ethics policy	Review Code of Ethics pol...	HR	Position
Complete I-9	HR completes I-9	HR	Position
Complete W-4	Complete the W-4 for tax...	Self-service	Employee
Computer setup	Get computer setup	IT	Position
Confirm offer	Confirm offer letter sent t...	HR	Position
Confirm start date and time	Confirm arrival time and ...	HR	Position
Connect to a printer	Connect to a local printer...	Multiple groups selected	Employee
Create welcome guide	Create the employee's we...	Manager	Position
Discrimination policy	Review discrimination pol...	HR	Position
Discuss training	Walk employee through o...	Training	Position
Drug policy	Review drug policy	HR	Position
Enter personal information	Enter personal information	Self-service	Employee
First month check-in	Review the first month of ...	HR	Position
Join a domain	Join a company domain	IT	Position
Name plate	Order name plate and offi...	Executive	Position
New employee contact	Provide new employee wi...	HR	Position
Order cell phone	Order cell phone	Executive	Position

Standard view < Create a new task

Details

Task: **Onboarding meeting** (highlighted with a red arrow)

Optional: No

Assigned to: **Hosam Gohary El-Gohary** (highlighted with a red circle)

Description:

Task link:

Task groups:

Assignment type: **Worker**

Contact person:

Due date offset from start date: **0**

Instructions

Apply to checklists

Name	Description	Owner
All employees	Tasks for all employees be...	Brooke Drynan
Executives	Used for hiring executives	Brooke Drynan
US Only	Specific to the United Stat...	Brooke Drynan

OK Cancel