

CAI3_ERP8_G3 MSD HCM Application Consultant/Management &ERP
Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmed

Prepared By: MSDers Team

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Graduation project of MSDers Team

Payroll Integration Simulation

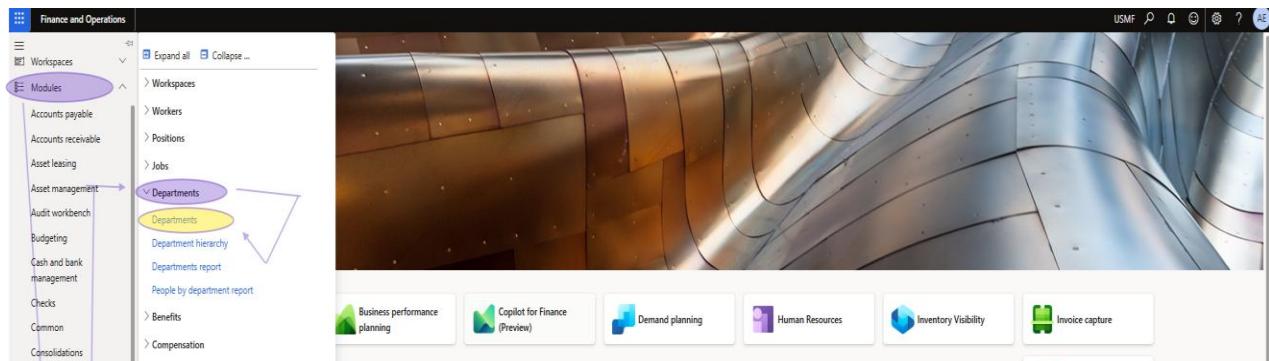
Objective: Link HR data with payroll processes.

Scope:

- Maintain worker salary details.
- Simulate payroll calculation using integrated module.
- Post payroll results to Finance.
- Generate payroll register reports.

Creating departments

Departments shall be established through entering the following path:
Human resources > Departments > Departments



- 1- Click "New"
- 2- Input "Department number" and "Name".
- 3- Input "Search name" which will appear in the Chart.

The screenshot shows the 'Departments' form in Microsoft Dynamics 365. The left sidebar lists various modules under 'Human resources'. The main area shows a list of existing departments (e.g., 'MSDers Department 1' to 'MSDers Department 5') and a new department record for 'MSDers Department 1'. The 'Operating unit' section is expanded, showing the department's name, number, and type. The 'General' section includes fields for 'Name', 'Number', 'Memo', and 'In hierarchy'. Below these are sections for 'Manager', 'Addresses', and 'Contact information'.

Input the Department Manager (Optional), "Addresses" and "Contact Information" for each department

Creating Employment categories

- Path: Human resources > Setup > Employment categories

The screenshot shows the Microsoft Dynamics 365 Human Resources navigation menu. The 'Human resources' node is highlighted with a yellow oval. A blue arrow points from this node down to the 'Setup' node, which is also highlighted with a yellow oval. Another blue arrow points from 'Setup' down to the 'Employment categories' node, which is also highlighted with a yellow oval. To the right of the menu, there is a large blue thought bubble containing the following steps:

1. Click "New".
2. Select the worker type.
3. Enter the employment category and a description for each type "Employment Category".

The screenshot shows the 'Employment categories' list page. At the top, there is a toolbar with icons for Save, New, Delete, and Options. The main area displays a table titled 'Standard view *'. The columns are 'Worker type', 'Employment category', and 'Description'. There are two rows of data:

Worker type	Employment category	Description
Employee	MSDers Emp-Category 1	Graduation project of MSDers Team
Contractor	MSDers Emp-Category 2	Graduation project of MSDers Team

Creating Employment types

- Path: Human resources > Setup > Employment types

The screenshot shows the Microsoft Dynamics 365 interface. On the left, the 'Modules' navigation pane is open, with 'Human resources' highlighted. Under 'Human resources', 'Setup' is expanded, and 'Employment types' is selected. A large blue cloud bubble on the right contains the following steps:

1. Click "New".
2. Select the worker type.
3. Enter the employment type and a description for each contract "Employment Type".

The screenshot shows the 'Employment types' list page. At the top, there are buttons for 'Save', 'New', 'Delete', and 'Options'. The main area displays a table with columns for 'Employment type' and 'Description'. The first row, 'MSDers Emp-Type 5', has a yellow oval around it. The second row, 'MSDers Emp-Type 4', has a blue oval around it. The third row, 'MSDers Emp-Type 3', has a yellow oval around it. The fourth row, 'MSDers Emp-Type 2', has a blue oval around it. The fifth row, 'MSDers Emp-Type 1', has a yellow oval around it. The last three rows ('ERP System Control', 'Field', 'Full Time') have blue ovals around them. The 'Description' column for 'MSDers Emp-Type 5' contains 'Top Management- Graduation project of MSDers Team'. The 'Description' column for 'MSDers Emp-Type 4' contains 'Consultant -Graduation project of MSDers Team'. The 'Description' column for 'MSDers Emp-Type 3' contains 'Contract - Graduation project of MSDers Team'. The 'Description' column for 'MSDers Emp-Type 2' contains 'Part Time - Graduation project of MSDers Team'. The 'Description' column for 'MSDers Emp-Type 1' contains 'Full Time - Graduation project of MSDers Team'. The 'Description' column for 'ERP System Control' contains 'Contractor'. The 'Description' column for 'Field' contains 'Field employees'. The 'Description' column for 'Full Time' contains 'CAI3 Full Time'.

Creating Job levels

- Path: Human resources > Jobs > Job levels

The screenshot shows the Microsoft Dynamics 365 interface for Finance and Operations. The navigation path is: Human resources > Jobs > Job levels. A blue arrow points from the 'Human resources' node to the 'Job levels' node. A blue cloud bubble contains the following steps:

- 1- Click "New".
- 2- Enter the "Line".

Sub-points for step 2:

- Line name and description "Job level" and "Description".
- Enter "minimum pay range".
- Enter "Maximum pay range".

Line ↑	Job level	Description	Minimum pay range	Maximum pay range	Increment minimum am...	Increment maximum am...
8.0	MSDers Job Level 2	Staff - Graduation project of MSDers Team	0.00	0.00	0.00	0.00
7.0	MSDers Job Level 1	Management - Graduation project of MSDers Team	0.00	0.00	0.00	0.00
1.0	Top Management	Management	200,000.00	500,000.00	0.00	0.00
2.0	Management	Management	90,000.00	200,000.00	0.00	0.00
3.0	Professional	Staff	3,000.00	100,000.00	0.00	0.00

Creating Jobs

- Path: Human resources > Jobs > Jobs

The screenshot shows the Microsoft Dynamics 365 interface. On the left, there's a sidebar with 'Finance and Operations' at the top, followed by a list of modules: Fleet management, General ledger, Global inventory accounting, HR business process, **Human resources**, Inventory management, Landed cost, Leave and absence, Master planning, NextGen Payroll, Organization administration. Under 'Human resources', 'Jobs' is selected and highlighted with a yellow oval. A secondary list of sub-options for 'Jobs' is shown on the right, with 'Jobs' also highlighted with a yellow oval.

- 1- Click "New".
 2- Enter a name for the "Job" and "Description".

This screenshot shows the 'Jobs' creation screen. At the top, there are buttons for Save, **New**, Delete, Copy from, ADA, Changes timeline, and Options. The main area is titled 'General'. It has fields for 'Job' (containing 'MSDers Job 1'), 'Description' (containing 'Graduation project of MSDers Team'), 'Title' (empty), 'Full-time equivalent' (set to 1.00), and 'Maximum number of positions' (radio button for 'Unlimited' selected). There are also buttons for 'Personalize: Title', 'View shortcuts', and 'View details'.

This screenshot shows the 'Titles' list screen. At the top, there are buttons for Save, **New**, Delete, and Options. The main area is titled 'Standard view' and shows a list of titles with their descriptions. The first item in the list is 'MS Ders Title 5 - Graduation project of MSDers Team'. A blue arrow points from the 'New' button back towards the 'Jobs' screen above it.

Right Click Title to create a new title then click back to return to the Job

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Job Standard view

MSDers Job 1: MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan

General

- Job: MSDers Job 1
- Description: MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan
- Title: MSDers Title 1
- Full-time equivalent: 1.00
- Maximum number of hours per week: Maximum Unlimited

Description

Job 1 - Graduation project of MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan

Job classification

- Function: MSDersFunction1
- Job type: MSDers JobType1
- Job family: MSDers Job Family 1
- POS permission group

Compensation

Skills

Certificates

Tests

Education

Screenings

Job tasks

Areas of responsibility

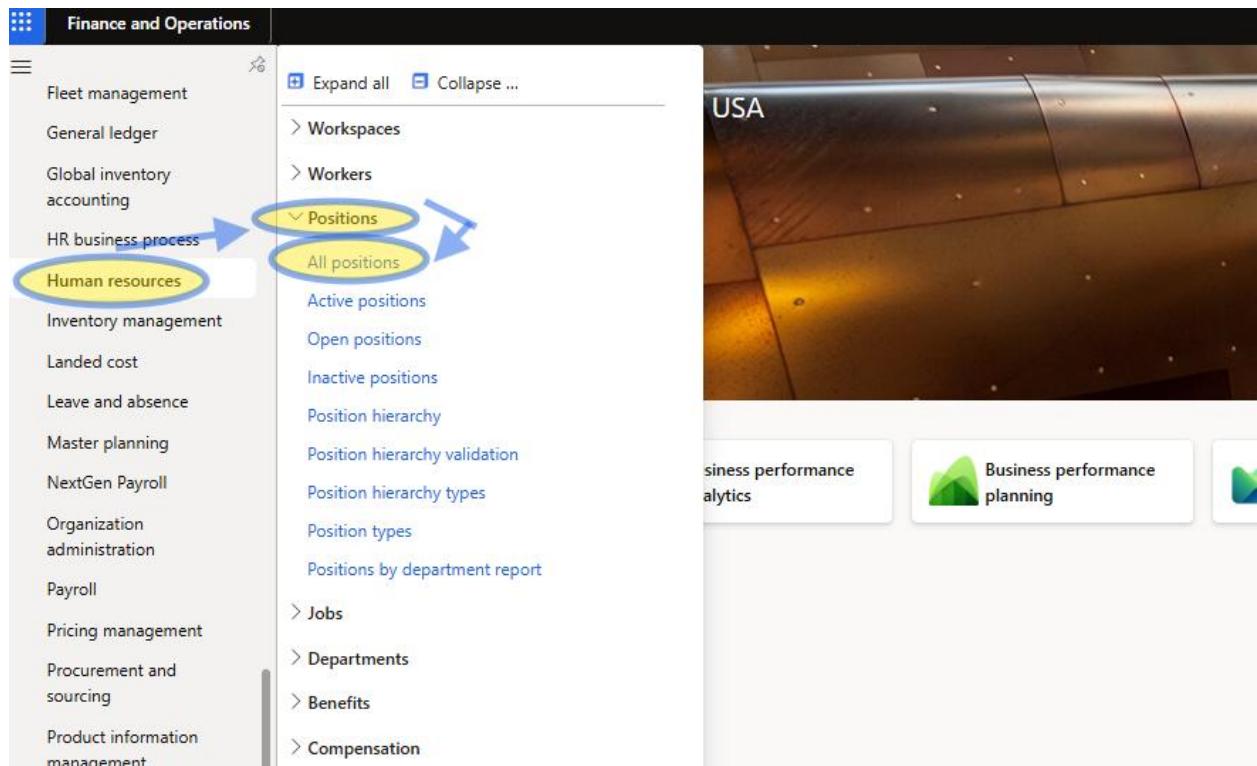
3- Select "Function".
4- Select "Job type".
5- Select "Job Family".

Job Standard view

Job	Description	Title	Full-time equivalent	Job type	Function
MSDers Job 1	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan	MSDers Title 1	1.00	MSDers JobType1	MSDersFunction1
MSDers Job 2	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan	MSDers Title 2	1.00	MSDers JobType2	MSDersFunction2
MSDers Job 3	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan	MSDers Title 3	1.00	MSDers JobType3	MSDersFunction3
MSDers Job 4	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan	MSDers Title 4	1.00	MSDers JobType4	MSDersFunction4
MSDers Job 5	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan	MSDers Title 5	1.00	MSDers JobType5	MSDersFunction5

Creating positions

- Path: Human resources > Positions > All positions



Click "New" to create a new number for the position automatically (or manually).

1- Select Job and Department (Department).

2- Enter the activation date for the position as old, for example, 2025.

3- Click on "Create position".

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Finance and Operations Human resources > Positions > All positions

All positions | Standard view

002373 : MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan

Position 002373	Job MSDers Job 1	Department MSDers Department	Position type Full-time equivalent 1.00	Location Available for assignment	Job family MSDers Job Family 1	Template ID
Description MSDers. Wlaaa - Ahmad - Ah...	Job level MSDers Title 1	Title MSDers Title 1			Recruiting request	*
Position duration						
+ New Edit Retire						
Activation 01/01/2025	Retirement Never					

Finance and Operations Human resources > Positions > All positions

All positions

Standard view *

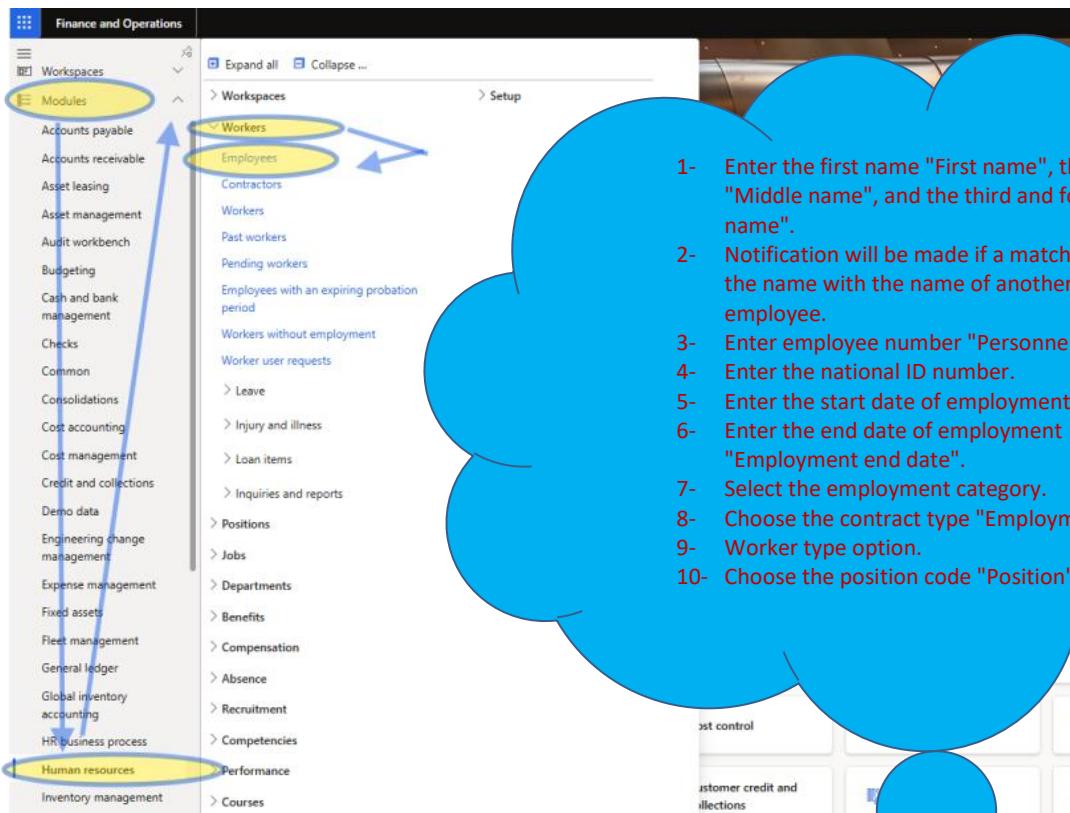
MSDers

Position	Description	Worker	Job	Job level	Department	Reports to position	Job family	Recruiting request
002373	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 1	Benjamin Martin	MSDers Job 1	MSDers Department 1	MSDers Job Family 1	USMF-000001		
002374	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 2	MSDers Employee Worker 2	MSDers Job 2	MSDers Department 2	MSDers Job Family 2			
002375	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 3	MSDers Employee Worker 3	MSDers Job 3	MSDers Department 3	MSDers Job Family 3			
002376	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 4	MSDers Employee Worker 4	MSDers Job 4	MSDers Department 1	MSDers Job Family 4			
002377	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 5	MSDers Employee Worker 5	MSDers Job 5	MSDers Department 1	MSDers Job Family 5			
002378	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 1		MSDers Job 1	MSDers Department 1	MSDers Job Family 1			
002379	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 1		MSDers Job 1	MSDers Department 1	MSDers Job Family 1			
002380	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 1		MSDers Job 1	MSDers Department 1	MSDers Job Family 1			
002381	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 1		MSDers Job 1	MSDers Department 1	MSDers Job Family 1			
002382	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 1		MSDers Job 1	MSDers Department 1	MSDers Job Family 1			
002383	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 2		MSDers Job 2	MSDers Department 1	MSDers Job Family 2			
002384	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 2		MSDers Job 2	MSDers Department 1	MSDers Job Family 2			
002385	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 2		MSDers Job 2	MSDers Department 1	MSDers Job Family 2			
002386	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 2		MSDers Job 2	MSDers Department 1	MSDers Job Family 2			
002387	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 2		MSDers Job 2	MSDers Department 1	MSDers Job Family 2			
002388	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 3		MSDers Job 3	MSDers Department 1	MSDers Job Family 3			
002389	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 3		MSDers Job 3	MSDers Department 1	MSDers Job Family 3			
002390	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 3		MSDers Job 3	MSDers Department 1	MSDers Job Family 3			
002391	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 3		MSDers Job 3	MSDers Department 1	MSDers Job Family 3			
002392	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 3		MSDers Job 3	MSDers Department 1	MSDers Job Family 3			
002393	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 4		MSDers Job 4	MSDers Department 1	MSDers Job Family 4			
002394	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 4		MSDers Job 4	MSDers Department 1	MSDers Job Family 4			
002395	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 4		MSDers Job 4	MSDers Department 1	MSDers Job Family 4			
002396	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 4		MSDers Job 4	MSDers Department 1	MSDers Job Family 4			
002397	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 4		MSDers Job 4	MSDers Department 1	MSDers Job Family 4			
002398	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 1		MSDers Job 1	MSDers Department 1	MSDers Job Family 1			
002399	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 5		MSDers Job 5	MSDers Department 1	MSDers Job Family 5			
002400	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 5		MSDers Job 5	MSDers Department 1	MSDers Job Family 5			
002401	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 5		MSDers Job 5	MSDers Department 1	MSDers Job Family 5			

of rows
31 rows

Creating Employees

- Path: Human resources > Workers > Employees



- 1- Enter the first name "First name", the second "Middle name", and the third and fourth "Last name".
- 2- Notification will be made if a match is found in the name with the name of another employee.
- 3- Enter employee number "Personnel number".
- 4- Enter the national ID number.
- 5- Enter the start date of employment.
- 6- Enter the end date of employment "Employment end date".
- 7- Select the employment category.
- 8- Choose the contract type "Employment Type".
- 9- Worker type option.
- 10- Choose the position code "Position".

The screenshot displays two windows of the Microsoft Dynamics 365 interface. On the left, the 'Employees (Active)' list view shows a grid of employee records with columns for Name, Personnel number, Phone, Extension, Worker type, Email address, and Job. A red callout with the text 'Click "New" to assign a new worker.' points to the 'New' button at the top-left of the list view. On the right, a detailed 'New Employee' creation form is open. It includes sections for 'Details' (Name, Legal entity, National ID, Personnel number, Employment start date, Employment end date, Worker type, Employment category, Employment type, Termination reason, Last date worked), 'Position details' (Position, Position title, Assignment start date, Assignment end date, Make primary), and 'Onboarding checklists' (Checklist). A red callout points to the 'Position' dropdown in the 'Position details' section.

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Finance and Operations > Workers > Employees

Standard view *

Name	Personnel number	Phone	Extension	Worker type	Email a...	Job	Job level	Job family	Department :
MSDers Employee Worker 1	555551			Employee		MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan	MSDers Job Level 1	Graduation project of MS...	MSDers Depart...
MSDers Employee Worker 2	555552			Employee		MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan	MSDers Job Level 1	Graduation project of MS...	MSDers Depart...
MSDers Employee Worker 3	555553			Employee		MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan	MSDers Job Level 1	Graduation project of MS...	MSDers Depart...
MSDers Employee Worker 4	555554			Employee		MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan	MSDers Job Level 1	Graduation project of MS...	MSDers Depart...
MSDers Employee Worker 5	555555			Employee		MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan	MSDers Job Level 1	Graduation project of MS...	MSDers Depart...
MSDers Worker Employee 1	0000055551			Employee		MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan	MSDers Job Level 1	Graduation project of MS...	MSDers Depart...

Employee Details for MSDers Employee Worker 1

Profile: MSDers Employee Worker 1 555551
MSDers Title 1 • MSDers Department • Employee
Contoso Entertainment System USA

Job: MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan | Job level: Employed | Employee Status: Location

Worker summary:

Personnel number: 555551	Seniority date: []	Sort order: 0	Works from home: No	Office address: []	Retire: No	Language: en-us
Original hire date: []	Anniversary date: []	Title: []	Office location: []	OTHER INFORMATION	Address books: []	اللغة: []

Name details:

Change worker name - Name History

First name: MSDers	Middle name: Employee	Last name prefix: []	Last name: Worker 1	Known as: []	Search name: MSDers Employee Worker 1	Personal title: []	Personal suffix: []
Display as: FirstMiddleLast							

Addresses:

+ Add / Edit / Map / More options

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

Finance and Operations > Human resources > Workers > Employees

Standard view *

Employee Details for MSDers Employee Worker 1

Profile: MSDers Employee Worker 1 555551
Account Manager • BS • Employee
Contoso Entertainment System USA

Job: Account Manager | Job level: Employed | Employee Status: Location

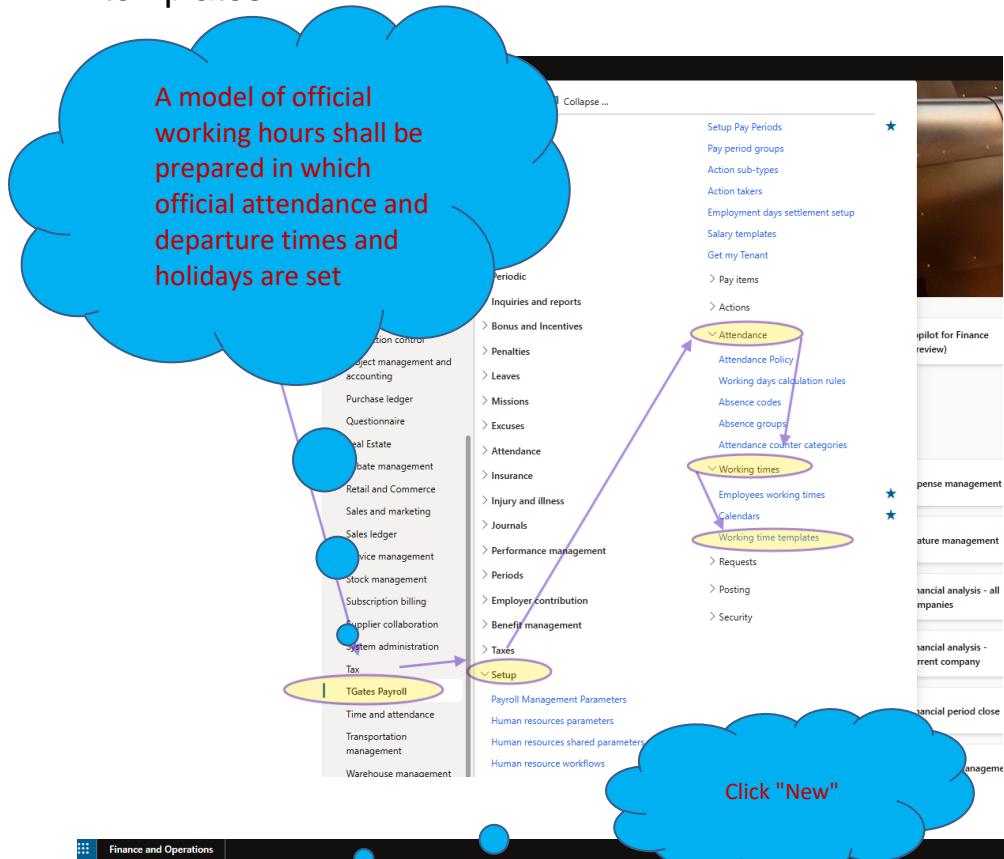
Positions:

+ Add assignment / Edit assignment / End assignment

Assignment type	Status	Position	Description	Job level	Family	Department	Primary position	Assignment start	Assignment end	Reason code	Artic :
Employment	Active	000630	Account Manager	BS	المجموعة العامة للموظفين المخصصية	IT Department	MSDers Job Family 1	MSDers Department 1	Yes	26/10/2025	26/10/2025
Employment	Active	000642	Controller	BS	المجموعة العامة للموظفين المخصصية	Human Resources	MSDers Job Family 1	MSDers Department 1	No	26/10/2025	26/10/2025
Employment	Active	000685	مدير موارد بشرية	BS	المجموعة العامة للموظفين المخصصية	MSDers Job Family 1	MSDers Department 1	Yes	26/10/2025	26/10/2025	
Employment	Active	002380	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 1	MSDers Job Family 1	MSDers Job Family 1	MSDers Department 1	MSDers Job Family 1	MSDers Department 1	Yes	26/10/2025	Never
Employment	Past	002373	MSDers. Wlaaa - Ahmad - Ahmad - Eslam - Safwan Position 1	MSDers Job Family 1	MSDers Job Family 1	MSDers Department 1	MSDers Job Family 1	MSDers Department 1	No	01/01/2025	31/01/2025

Working times

TGates payroll > Setup > Attendance > Working times > working time templates



Click "New"

Finance and Operations

+ New

Working time template Name: **MSDer_WT** **MSDers Working time template...**

Monday

+ Add Remove Copy day

	From	To	Efficiency	Property	Tolerance minutes before Clock in	Tolerance minutes before Clock out	PreviousDay	Continuous day	Flex minutes
	08:00	16:00	100.00		30	15			0

1.8 hrs
 8-4 mon-fri&tues flex60min hossam

1.8hrs
 any 8 hrs in day hossam

10-17
 From 10 AM to 5 PM Egy

12H
 12H

12H 1.1

Enter the working time form "Working Time Template" and the name "Name".
 Every day of the week the entry times "From", exit "To" and allow before entry "Tolerance minutes before clock in" are entered (flexible hour 60 minutes).

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Finance and Operations

Save + New Delete

Copy template Options

Working time templates

Working time template Name: MSDers_WT

MSDers Working time template...

Monday

+ Add - Remove Copy day

From: 08:00 To: 16:00 Efficiency: 100.00 Tolerance minutes before Clock in: 30 Tolerance minutes before Clock out: 15 PreviousDay Continuous day

Closed for pickup: No Hours: 8.00

Tuesday

+ Add - Remove Copy day

From: To: Efficiency: Property: Tolerance ... Tolerance ... PreviousDay Continuous... Flex minutes

We didn't find anything to show here.

Wednesday

+ Add - Remove Copy day

From: To: Efficiency: Property: Tolerance ... Tolerance ... PreviousDay Continuous... Flex minutes

We didn't find anything to show here.

Standard view ▾

Copy day

From weekday: Monday To weekday: Tuesday

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

OK Cancel

1.8 hrs 8.4 mondays Feedmin hossam
1.8hrs any 8 hrs in day hossam
10-17 From 10 AM to 5 PM Egy
12H 12M
12H 1.1
12H-Day 12H-Day
24 HOURS 24 HOURS
24Hr-Day Production Work Day 24hr
8 H Eslam 8 Hours Day Eslam
8 H Eslam2 8 H Eslam2
8 hours Day shift 8 am - 4 pm
8H Bakkar Bakkar
9-5 From 9 AM to 5 PM
A Moharram Day shift A Moharram
Employees Employees-omnia
KHF 8AM-5PM
Nada 12 H 12 H 11 AM - 5 PM

Standard view ▾

Working time templates

Working time template Name: MSDers_WT

MSDers Working time template...

Closed for pickup: No Hours: 8.00

Tuesday

Wednesday

Thursday

Friday

+ Add - Remove Copy day

From: To: Efficiency:

Closed for pickup: Yes

Saturday

+ Add - Remove Copy day

From: To: Efficiency: Property: Tolerance ... Tolerance ... PreviousDay Continuous... Flex minutes

Closed for pickup: Yes

Sunday

If it is a holiday such as Friday and Saturday "Closed for pickup" shall be selected.

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TGates payroll > Setup > Attendance > Working times > Calendars

The screenshot shows the Microsoft Dynamics 365 HR & Payroll application. The left sidebar lists various modules: 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, Questionnaire, Real Estate, Rebate management, Retail and Commerce, Sales and marketing, Sales ledger, Service management, Stock management, Subscription billing, Supplier collaboration, System administration, Tax, TGates Payroll, Time and attendance, and Setup.

The main area displays a hierarchical menu under 'Setup': Workspaces, Work process, Workers, Salary, Transactions, Loans, Periodic, Inquiries and reports, Bonus and Incentives, Penalties, Leaves, Missions, Excuses, Attendance, Insurance, Injury and illness, Journals, Performance management, Periods, Employer contribution, Benefit management, Taxes, Attendance, Working times, Employees working times, and Calendars.

A blue callout bubble on the right contains the following text:

Click "New".
Enter calendar
"Calendar" and name
"Name".
Determine if the
calendar operates with
"Flex hours" flexible
clocks.

The 'Calendars' screen shows a list of existing calendars. One calendar, 'MSDers-B-16', is selected. The details for this calendar are shown in a modal dialog. The 'Counter category ID' dropdown menu is open, showing options like 'From information', 'Personalise Counter category ID', 'Report all rows', 'Export marked rows', 'Smart columns...', 'Group by this column', 'Freeze column', 'Hide this column', 'View shortcuts', and 'View details'.

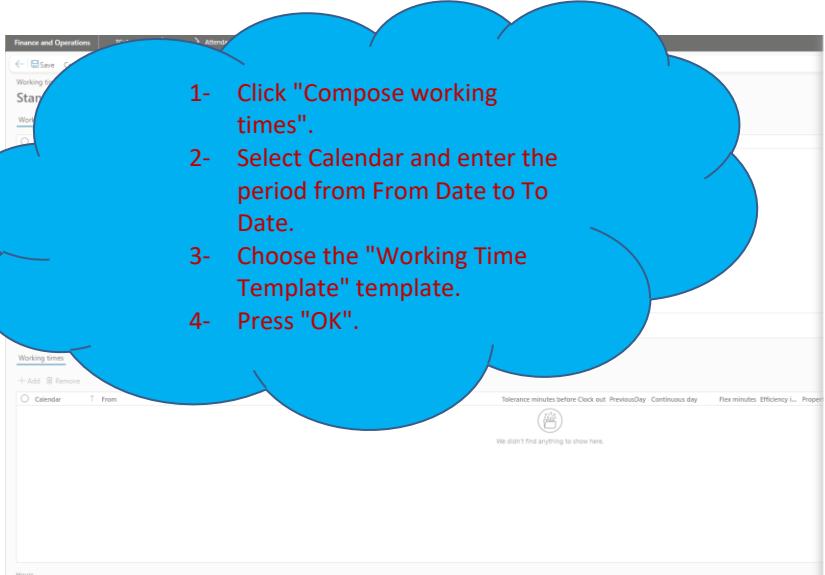
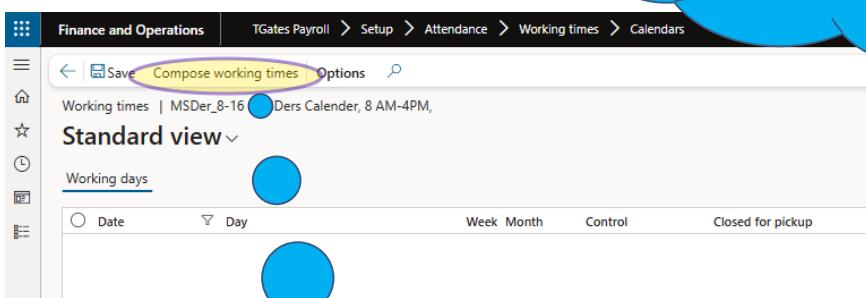
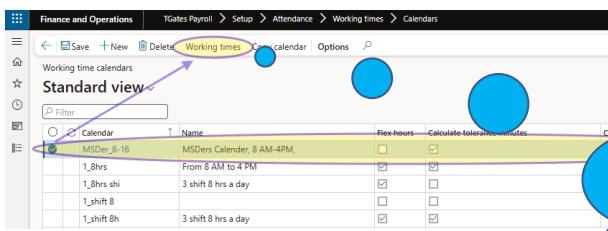
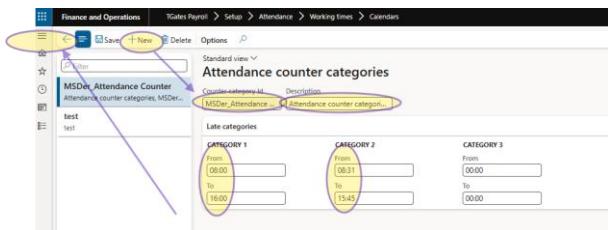
Calendar	Name	Flex hours	Calculate tolerance minutes	Counter category ID
MSDers-B-16	From 8 AM to 4 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	test
1_hhrs	3 shift 8 hrs a day	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	From information
1_hhrs_0h	3 shift 8 hrs a day	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Personalise Counter category ID
1_hshift_B	From 10 AM to 5 PM Egy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Report all rows
12hr_Day	24 HOURS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Export marked rows
24hr	Production 24hr	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Smart columns...
8 h_Eslam	From 8 AM to 4 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Group by this column
8 h_eslam2	From 08 Am to 04 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Freeze column

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Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

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Working days					
	Date	Day	Week	Month	Control
06/10/2025	Monday	41 October	41	October	Holiday
07/10/2025	Tuesday	41 October	41	October	Open
08/10/2025	Wednesday	41 October	41	October	Open
09/10/2025	Thursday	41 October	41	October	Open
10/10/2025	Friday	41 October	41	October	Closed
11/10/2025	Saturday	41 October	41	October	Closed
12/10/2025	Sunday	41 October	41	October	Open
13/10/2025	Monday	42 October	42	October	Open
14/10/2025	Tuesday	42 October	42	October	Open
15/10/2025	Wednesday	42 October	42	October	Open
16/10/2025	Thursday	42 October	42	October	Open
17/10/2025	Friday	42 October	42	October	Closed
Total					
1548 rows					

A specific day is designated as a public holiday by changing "Control = Holiday" to that day.

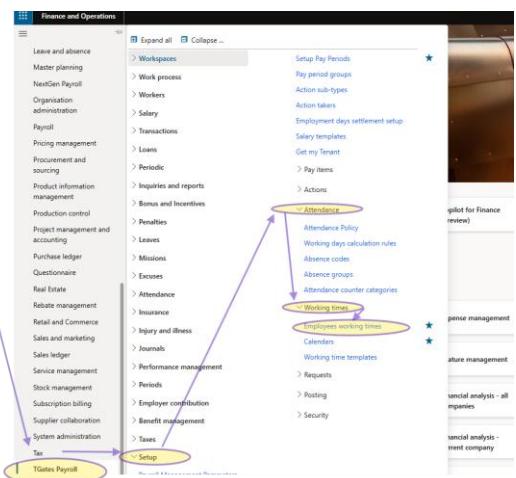
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TGates payroll > Setup > Attendance > Working times > Employee Working Times



The screenshot shows the 'Create lines' dialog box. The steps outlined in the cloud are:

- Click "Create Lines"
- Choose the calendar (MSDer_8-16)
- Enter the appointment period from "From date" (01/01/2025) to "To date" (31/12/2029)
- Select "Valid for workers = worker group" and choose the group "worker group".
- Press "OK".

The screenshot shows the 'Employees working times' grid. The steps outlined in the cloud are:

- Click "Create Lines"
- Choose the calendar (MSDer_8-16)
- Enter the appointment period from "From date" (01/01/2025) to "To date" (31/12/2029)
- Select "Valid for workers = worker group" and choose the group "worker group".
- Press "OK".

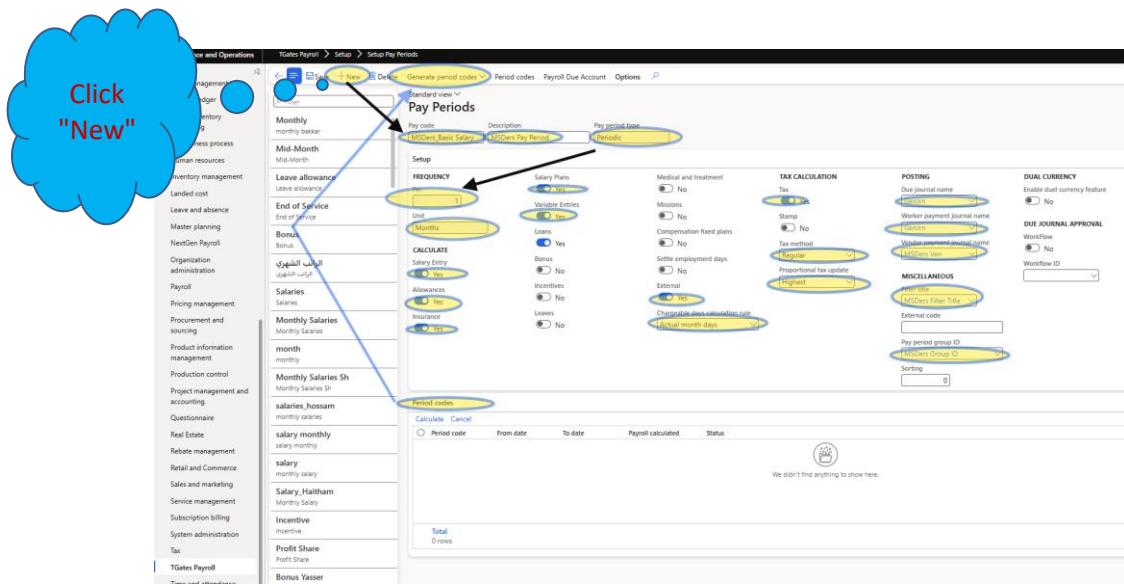
Calendar	Personnel number	Worker	From date	To date
MSDer_8-16	00000555551	MSDers Worker Employee 1	01/01/2025	31/12/2029
MSDer_8-16	555551	MSDers Employee Worker 1	01/01/2025	31/12/2029
MSDer_8-16	555552	MSDers Employee Worker 2	01/01/2025	31/12/2029
MSDer_8-16	555553	MSDers Employee Worker 3	01/01/2025	31/12/2029
MSDer_8-16	555554	MSDers Employee Worker 4	01/01/2025	31/12/2029
MSDer_8-16	555555	MSDers Employee Worker 5	01/01/2025	31/12/2029

- 1- Click "Create Lines" to automatically assign workers to the calendar.
 2- Choose the calendar.
 3- Enter the appointment period from the date "From Date" - to the date "To Date".
 4- Select "Valid for workers = worker group" and select the group "worker group".
 5- Press "OK".

Setup pay periods

Path: TGates payroll > Setup > Setup pay periods

Payment periods are what spent, such as the monthly salary, incentives, rewards, and other payments in general.



3. Enter the following data:

- Period code "Pay code" and description "Description".
- Period type: If the period calculation is periodic, "Periodic" or when needed, "Non-Periodic".
- Frequency: per "Per" (number of times) - Unit (in the period) (example: once per month)
- Notebook name: Choose the journal that is used to migrate the maturity entry in the ledger.
- Book name "Worker Payment Journal Name": Select the journal used to migrate the withholding entry in the ledger.
- Notebook name: Select the journal used to carry over the insurance entry in the ledger.
- Filter title: to separate land, sea and board of directors.
- Filter "External code": to link CFM and Dynamics.



4. Control of sources of calculation for the period (Taxes - Insurance - Loans - Bonus - Incentives - Variables - Salary plans - Medical and Treatment)

5. If there is an exchange in dollars, for this exchange, select "Enable dual currency feature" and choose the currency "Currency" in dollars.

- Choose the exchange rate type.
- Enter the "Percent" division rate. The amount that will be spent is in dollars, and the rest of the rate is spent in Egyptian.
- Choose the group of items "Group ID" that will be divided.

Create payment period lines (codes):

Payment period codes (months) represent a specific payment period with a start and end date.

- To create codes for the payment period:
- If the repetition type for the period is "Periodic":

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1- Click "Generate period codes".
 2- We enter the period for which we want to create codes, for example, one year (5 years).
 3- Then we click on "Generate" to create 60 lines for this period.

Period codes				
Period code	From date	To date	Payroll calculated	Status
1	01/01/2025	31/01/2025	<input type="checkbox"/>	None
2	01/02/2025	28/02/2025		None
3	01/03/2025	31/03/2025		None
4	01/04/2025	30/04/2025		None
5	01/05/2025	31/05/2025		None
6	01/06/2025	30/06/2025		None
Total: 60 rows				

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SafwIZ_P_Period_NonP
Sep 4, 2025 Session 4_جهاز الحاسوب

SafwIZ_P_Period_NonP
Sep 5, 2025 Assignment 4_جهاز الحاسوب

Pay Periods

Pay code: SafwIZ_P_Period_NonP **Description:** Sep 4, 2025 Session 4_جهاز الحاسوب **Pay period type:** Non-periodic

Setup

CAUCULATE	Variable Entries <input checked="" type="radio"/> No	Medical and treatment <input checked="" type="radio"/> No	External <input checked="" type="radio"/> No	TAX method: Regular	MISCELLANEOUS	DUAL CURRENCY
Salary Entry <input checked="" type="radio"/> No	Loans <input checked="" type="radio"/> No	Missions <input checked="" type="radio"/> Yes	Chargeable days calculation rule 30 days	Proportional tax update None	Filter title AB	Enable dual currency feature <input checked="" type="radio"/> No
Allowances <input checked="" type="radio"/> No	Bonus <input checked="" type="radio"/> No	Commission fixed plans <input checked="" type="radio"/> Yes	Settle employment days <input checked="" type="radio"/> No	Posting Due journal name GenJrn	External code	DUE JOURNAL APPROVAL
Insurance <input checked="" type="radio"/> Yes	Incentives <input checked="" type="radio"/> No			Worker payment journal name RDGenJrn	Pay period group ID Supplemental	Workflow <input checked="" type="radio"/> No
Salary Plans <input checked="" type="radio"/> No	Leaves <input checked="" type="radio"/> No			Vendor payment journal name VendPay	Sorting 0	Workflow ID

Period codes

+ Add line <input type="button" value="Remove"/> <input type="button" value="Calculate"/> <input type="button" value="Cancel"/>				
Period code	From date	To date	Payroll calculated	Status
1	07/09/2025	11/09/2025		None

- If the period type is "Non-Periodic":

- 1- On the lines of the payment periods "Period codes" we click on "Add line".
- 2- Enter the period line code "Period code", the start date "From date" and the end date "To date".

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TGates payroll > Setup > Pay item > Pay item groups

The screenshot shows the 'Pay item groups' screen in the 'TGates Payroll > Setup > Pay items > Pay item groups' section. A blue callout bubble points to the 'New' button at the top left of the grid, which is highlighted with a yellow circle. Another blue callout bubble contains the instructions: '1- Click "New" 2- Enter the pay item "Group ID" and the "Description".'

Group ID	Description
MSDers_Addition	Pay item groups - Graduation project...

The screenshot shows the 'Pay item groups' screen in the 'TGates Payroll > Setup > Pay items > Pay item groups' section. A blue callout bubble points to the 'New' button at the top left of the grid, which is highlighted with a yellow circle. Another blue callout bubble contains the instructions: '1- Click "New" 2- Enter the pay item "Group ID" and the "Description".'

Group ID	Description
MSDers_Deduction	Deduction - Graduation project of MSDers

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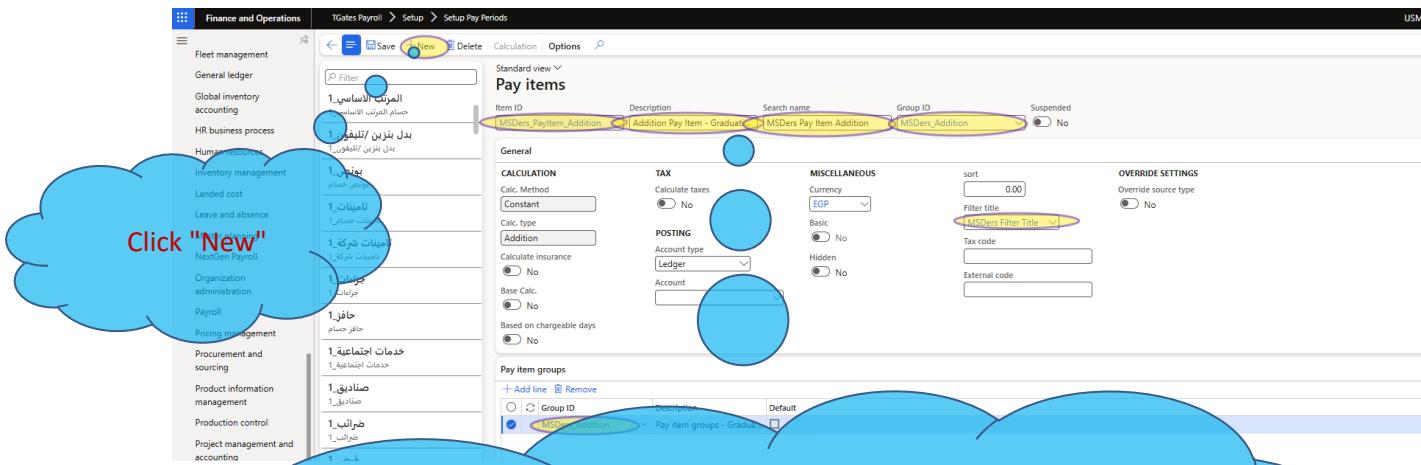
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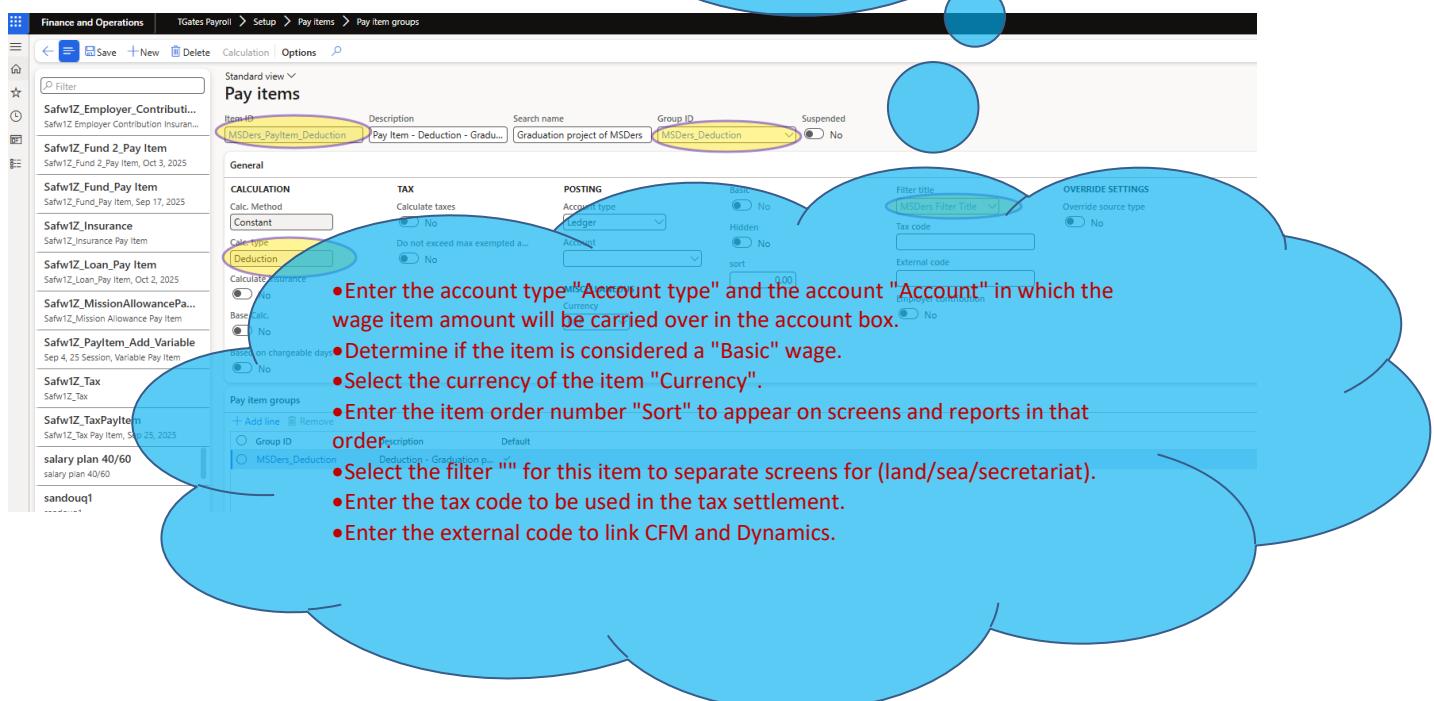


Setup pay items

TGates payroll > Setup > Pay items > Pay items



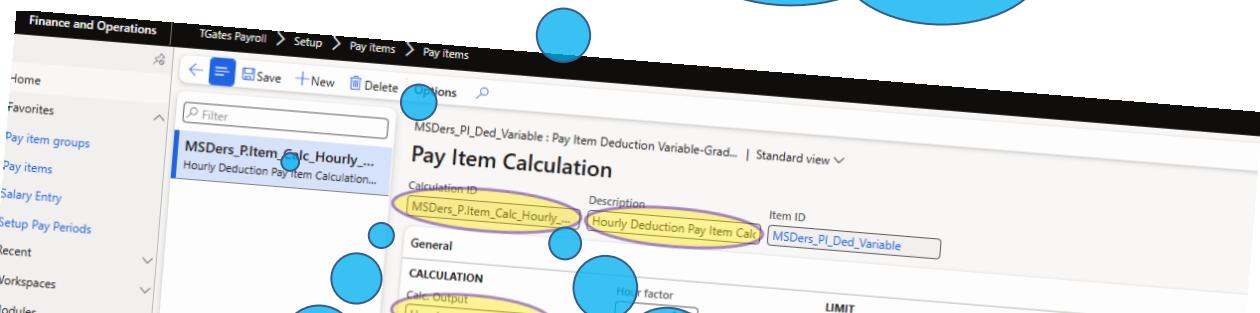
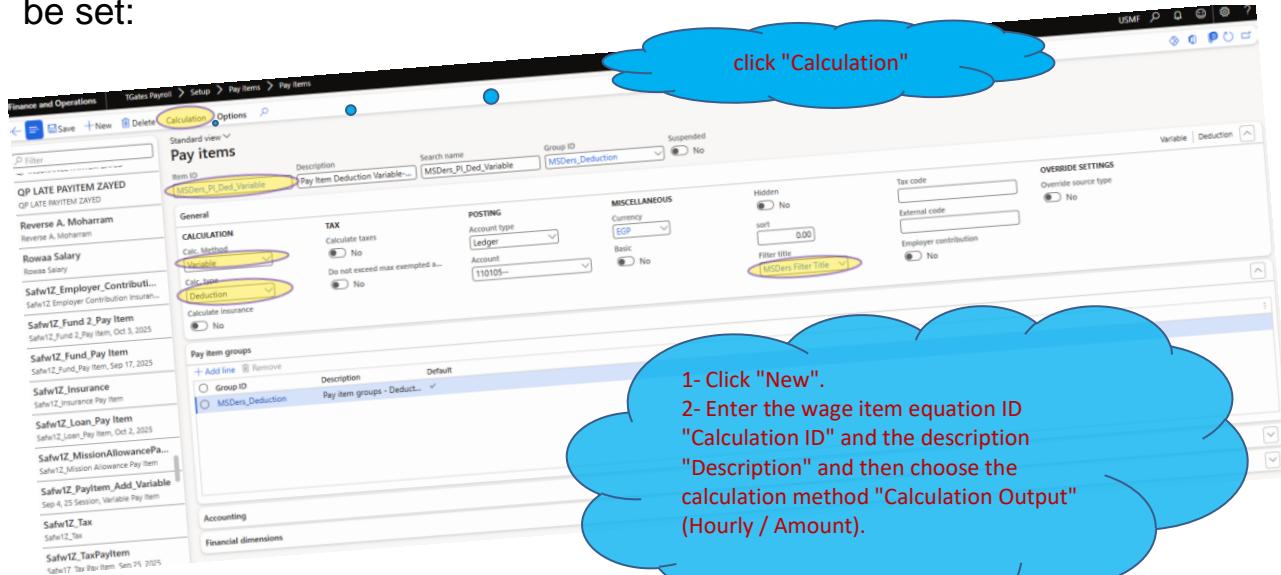
- 1- Enter the pay item ID and Description and then select the previously created pay item Group ID.
- 2- Enter the search name to use it in reports and facilitate the search process.
- 3- Item type "Calc. method":("Constant" or "Variable").
- 4- Nature of the item "Calc. type": ("Addition" or "Deduction").
- 5- Determine whether the item is subject to taxes or insurance.
- 6- Specify if the item is "Base calc." Only (it does not appear in the final calculation result as it is used as a basis for calculating other items only).
- 7- Determine whether the item is automatically settled based on business days.



Setup calculation equation for variable pay items

TGates payroll > Setup > Pay items > Pay items > Calculation

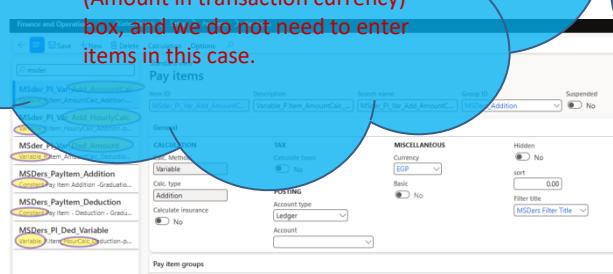
When creating a variable wage item, the item calculation equation must be set:



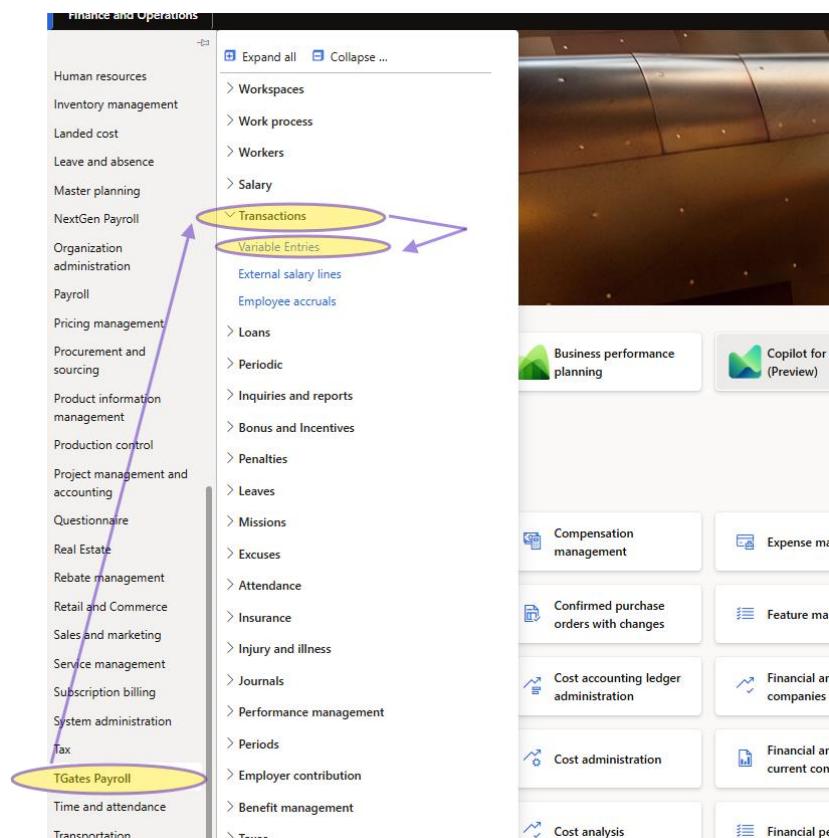
- Amount: It is calculated when entering variables based on a lump sum that is entered when recording the movement, or it can be fixed on the calculation equation in the (Amount in transaction currency) box, and we do not need to enter items in this case.

Hourly: where the calculation is based on the hourly rate of the items chosen in the lines of the hourly calculation equation.

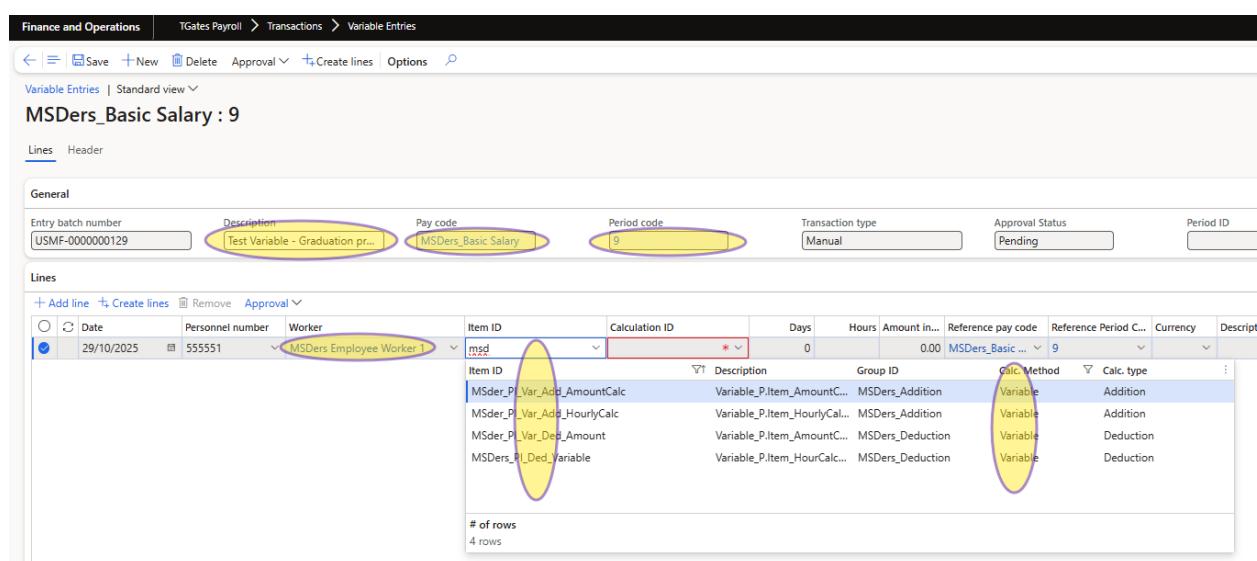
- Enter the hourly factor: The hourly rate is multiplied by the factor.
- Enter the minimum "Min" or maximum "Max" if required.
- Enter items by item "Item ID" or group of items "Group ID" on the basis of which the hourly rate is calculated.
- If "Update amount from source" is selected, the value of the item ID amount itself (found in



To Test Calculations



The screenshot shows the Microsoft Dynamics 365 Finance and Operations interface. The left sidebar lists various modules: Human resources, Inventory management, Landed cost, Leave and absence, Master planning, NextGen Payroll, Organization administration, Payroll, Pricing management, Procurement and sourcing, Product information management, Production control, Project management and accounting, Questionnaire, Real Estate, Rebate management, Retail and Commerce, Sales and marketing, Service management, Subscription billing, System administration, Tax, TGates Payroll, Time and attendance, and Transportation. The 'TGates Payroll' module is highlighted with a yellow oval. The main area shows a tree view with 'Transactions' and 'Variable Entries' expanded, both highlighted with yellow ovals. Arrows point from the 'Transactions' and 'Variable Entries' ovals towards the 'TGates Payroll' module. To the right, there are several cards for Business Performance Planning and Copilot for Preview. Below this, a grid of various financial and operational management modules is displayed.



The screenshot shows the 'Variable Entries' screen under 'Transactions' in the TGates Payroll module. The top navigation bar includes 'Save', 'New', 'Delete', 'Approval', 'Create lines', 'Options', and a search icon. The main area displays a table with columns: General (Entry batch number, Description, Pay code, Period code, Transaction type, Approval Status, Period ID), Lines (Date, Personnel number, Worker, Item ID, Calculation ID, Days, Hours, Amount in..., Reference pay code, Reference Period C..., Currency, Description), and a detailed view of the 'Item ID' column. The 'Description' column for the first row is 'Test Variable - Graduation pr...', the 'Pay code' is 'MSDers_Basic_Salary', and the 'Period code' is '9'. The 'Calc. Method' column for the first item in the detailed view is 'Variable' and the 'Calc. type' is 'Addition'. The 'Description' column for the second item is 'MSDer_P_..._Add_AmountCalc'.

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Finance and Operations | TGates Payroll > Transactions > Variable Entries

MSDers_Basic Salary :

General		Lines												
Entry batch number	Description	Pay code	Period code	Transaction type	Approval Status	Period ID	Payroll calculated							
USMF-0000000129	Test Variable - Graduation pr...	MSDers_Basic Salary	9	Manual	Pending		<input checked="" type="checkbox"/> No							
Lines		+ Add line	Create lines	Remove	Approval		Days	Hours	Amount in...	Reference pay code	Reference Period C...	Currency	Description	Action ID
		29/10/2025	555551	MSDers Employee Worker 1	MSder_PI_Var_Add_AmountCalc	MSDers_AmountCalc_P_Item_Add	0		500.00		9	EGP		

Finance and Operations | TGates Payroll > Transactions > Variable Entries

MSDers_Basic Salary : 9

General		Lines												
Entry batch number	Description	Pay code	Period code	Transaction type	Approval Status	Period ID	Payroll calculated							
USMF-0000000130	Hourly Variable Test Gradu...	MSDers_Basic Salary	9	Manual	Pending		<input checked="" type="checkbox"/> No							
Lines		+ Add line	Create lines	Remove	Approval		Days	Hours	Amount in...	Reference pay code	Reference Period C...	Currency	Description	Action ID
		29/10/2025	555551	MSDers Employee Worker 1	MSder_PI_Var_Add_HourlyCalc	MSDers_HourlyCalc_P_Item_Add	0	48.000000	0.00	MSDers_Basic Salary	9	EGP		

Finance and Operations | TGates Payroll > Transactions > Variable Entries

Standard view *

Transaction type		Variable Entries						
Entry batch number	Description	Pay code	Period code	Transaction type	Approval Status	Period ID	Payroll calculated	
USMF-0000000130	Hourly Variable Test Graduation project of MSDers,	MSDers_Basic Salary	9	Manual	Pending		<input type="checkbox"/>	
USMF-0000000129	Test Variable - Graduation project of MSDers	MSDers_Basic Salary	9	Manual	Approved		<input type="checkbox"/>	
USMF-0000000128	test	Basic salary - 2025	10	Manual	Approved		<input type="checkbox"/>	
USMF-0000000119		KHF Salary	10	Manual	Pending		<input type="checkbox"/>	

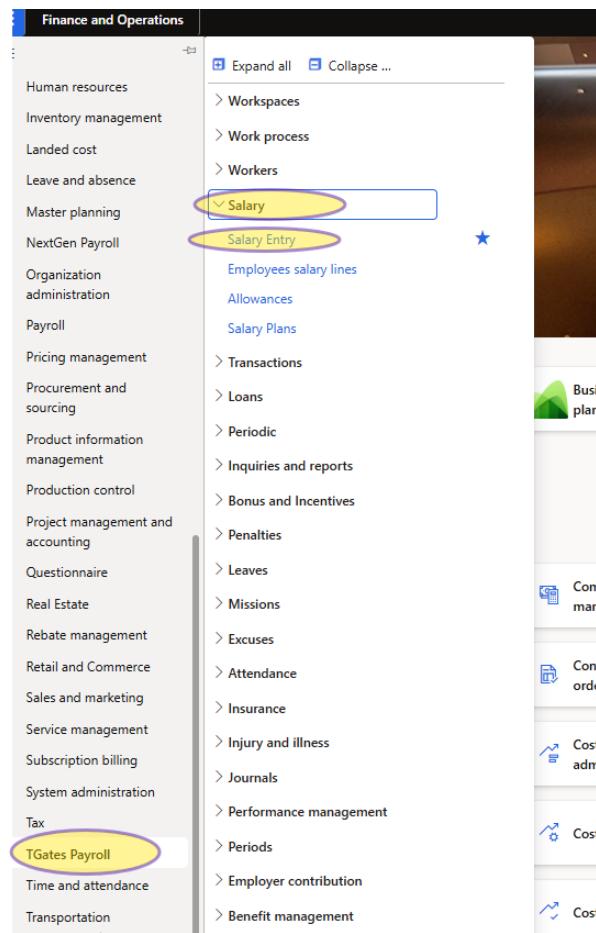
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TGates payroll > Salary > Salary entry



Line	Item ID	Description	Amount	Currency	Base Calc.	Suspended	Basic	Calc. type	Action number	Reference
1	MSDers_Basic_Salary	MSDers_Basic_Salary, Graduation project of MSDers.	30,000.00	EGP				Addition		
2	MSDers_Constant_Addition	Pay Item - Constant Addition, Graduation project of MSDers.	5,000.00	EGP				Addition		
3	MSDers_Constant_Deduction	Constant Deduction - Graduation project of MSDers.	2,000.00	EGP				Deduction		

- 1- Click "New", it shall be created automatically when the worker is hired.
 2- Enter the salary ID "Salary ID" and it will be the same as the worker's number.
 3- Enter the description "Description" and then we select the worker.
 4- In the Salary lines "Lines" we add the pay items "Item ID" and the amount "Amount" for each item.

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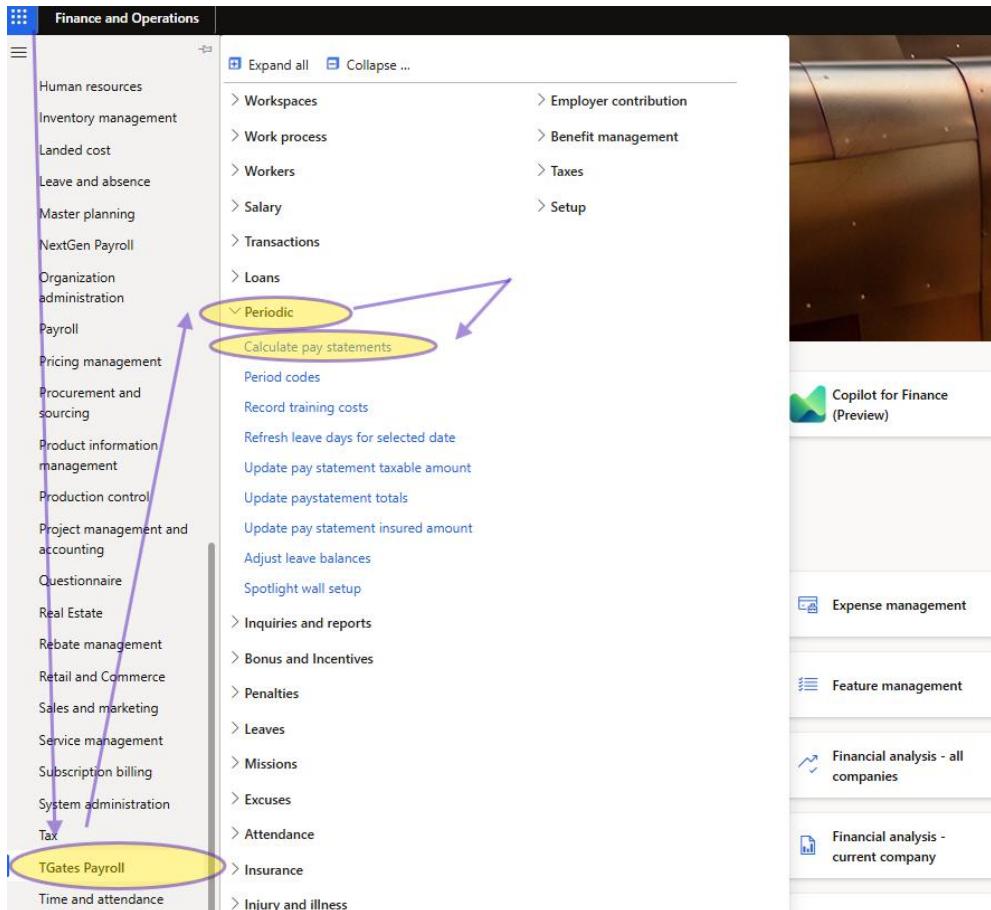


To Export to Excel

A	B	C	D	E	F
1	Salary ID	Name	Worker	Pay code	Suspended
67	007777	Safwan Z Zahran	Safwan Z Zahran	MSDers_Basic_Salary	No
68	555551	MSDers Employee Worker 1	MSDers Employee Worker 1	MSDers_Basic_Salary	No
69	555552	MSDers Employee Worker 2	MSDers Employee Worker 2	MSDers_Basic_Salary	No
70	555553	MSDers Employee Worker 3	MSDers Employee Worker 3	MSDers_Basic_Salary	No
71	555554	MSDers Employee Worker 4	MSDers Employee Worker 4	MSDers_Basic_Salary	No
72	555555	MSDers Employee Worker 5	MSDers Employee Worker 5	MSDers_Basic_Salary	No
73	0000055551	MSDers Worker Employee 1	MSDers Worker Employee 1	MSDers_Basic_Salary	No

Payroll calculation

TGates Payroll > Periodic > Calculate pay statement



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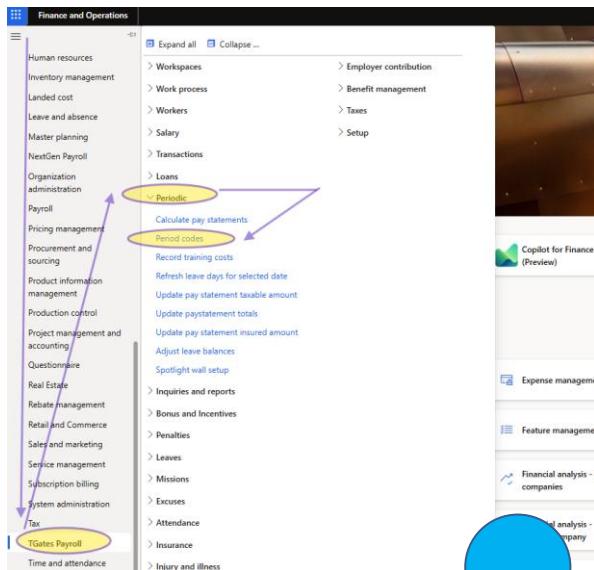
1- Enter the payment period "Pay code" and the period code "Period code".
 2- If the salary or cancellation is calculated for a group of employees only, choose "Valid for = Worker group" and enter the group "Worker group".
 3- Click on "Calculate" if counting, or click on "Cancel" if canceling.

Run in the background
 Recurrence Alerts
 Batch processing
 Yes
 Task description
 Calculate Salary for MSDers...
 Batch group
 DataUpdate
 Private
 No
 Critical Job
 Yes
 Monitoring category
 Undefined
 Start date: 29/10/2023 (214927) (GMT) Coordinated Universal Time

The Calculate Salary for MSDers_Basic_Salary - 9.00 task has been completed.
 The Calculate Salary for MSDers_Basic_Salary - 9.00 task has been completed.
 Calculate pay statements
 Pay code
 MSDers_Basic_Salary
 Period code
 1
 VALID FOR WORKERS
 Valid for
 Worker group
 Personnel number
 555551
 Worker
 MSDers Employee Worker 1
 Calculate Cancel Close

Payroll calculation

TGates payroll > Periodic > Period codes



Pay code	Period code	Description	Month	From date	To date	Payroll calculated	Status
MSDers_Basic Salary	1		January	01/01/2025	31/01/2025		None
MSDers_Basic Salary	2		February	01/02/2025	28/02/2025		None
MSDers_Basic Salary	3		March	01/03/2025	31/03/2025		None
MSDers_Basic Salary	4		April	01/04/2025	30/04/2025		None
MSDers_Basic Salary	5		May	01/05/2025	31/05/2025		None
MSDers_Basic Salary	6		June	01/06/2025	30/06/2025		None
MSDers_Basic Salary	7		July	01/07/2025	31/07/2025		None
MSDers_Basic Salary	8		August	01/08/2025	31/08/2025		None
MSDers_Basic Salary	9		September	01/09/2025	30/09/2025	None	None
MSDers_Basic Salary	10		October	01/10/2025	31/10/2025		None
MSDers_Basic Salary	11		November	01/11/2025	30/11/2025		None
MSDers_Basic Salary	12		December	01/12/2025	31/12/2025		None

Pay statement number	Personnel number	Worker	Pay code	Period code	Date	Additions	Deductions	Net Status	Approval Status	Due journal number	Employment	Char
USMF-000003230	P002010	Khaled Faizal	MSDers_Basic Salary	9	30/09/2025	0.00	0.00	Calculated	Pending	00000941		
USMF-0000023342	555551	MSDers Employee Worker 1	MSDers_Basic Salary	9	30/09/2025	0.00	0.00	Calculated	Pending	000008140		
USMF-0000023343	555552	MSDers Employee Worker 2	MSDers_Basic Salary	9	30/09/2025	0.00	0.00	Calculated	Pending	000008141		
USMF-0000023344	555553	MSDers Employee Worker 3	MSDers_Basic Salary	9	30/09/2025	0.00	0.00	Calculated	Pending	000008142		
USMF-0000023345	555554	MSDers Employee Worker 4	MSDers_Basic Salary	9	30/09/2025	0.00	0.00	Calculated	Pending	000008143		

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Finance and Operations

- Human resources
- Inventory management
- Landed cost
- Leave and absence
- Master planning
- NextGen Payroll
- Organization administration
- Payroll
- Pricing management
- Procurement and sourcing
- Product information management
- Production control
- Project management and accounting
- Questionnaire
- Real Estate
- Rebate management
- Retail and Commerce
- Sales and marketing
- Service management
- Subscription billing
- System administration
- Tax
- TGates Payroll**
- Time and attendance

Salary

- Salary Entry
- Employees salary lines
- Allowances**
- Salary Plans

Transactions

- Loan
- Periodic
- Inquiries and reports
- Bonus and Incentives
- Penalties
- Leaves
- Missions
- Excuses
- Attendance
- Insurance
- Injury and illness
- Journals
- Performance management
- Periods
- Employer contribution

Business performance planning

Copilot for Finance (Preview)

Cloud Services

- Compensation management
- Expense management
- Confirmed purchase orders with changes
- Feature management
- Cost accounting ledger administration
- Financial analysis - all companies**
- Cost administration
- Financial analysis - current company
- Dimension management

Finance and Operations TGates Payroll > Salary > Allowances

Allowances

General

Line	Valid for	Amount	Item ID	Group ID	Percent limit type	Max. Amount	Min. Amount	Original amount

We didn't find anything to show here.

Pay items

General

CALCULATION

- Calc. Method: Constant
- Calc. type: Addition
- Calculate insurance: Yes
- Based on chargeable days: No

TAX

- Calculate taxes: Yes

POSTING

- Account type: Ledger
- Account: 110105...

MISCELLANEOUS

- Currency: EGP
- Basic: No
- Hidden: No
- sort: 0.00
- Filter title: All

OVERRIDE SETTINGS

- Override source type: No

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Finance and Operations > TGates Payroll > Salary > Allowances

Standard view > **Allowances**

Allowance ID	Description	Item ID	Suspended
MSDer_Travel_Allow...	Travel Allowance- Graduation...	MSDer_Travel_Allowance_P...	No

General

PAY PERIODS: Valid for workers

Valid for: Table (highlighted)

Pay code: MSDers_Basic_Salary (highlighted)

Calculation lines:

+ Add line Remove

Line	Worker group	Valid for	Amount	Item ID	Group ID	Percent	Limit type	Max. Amou...	Min. Amou...	Original a...
1.0	Line: Worker group (highlighted)	Valid for (highlighted)	0.00	*		0.00	Output	0.00	0.00	

Pay code: MSDers_Basic_Salary

Calculation lines:

+ Add line Remove

Line	Worker group	Valid for	Amount	Item ID	Group ID	Percent	Limit type	Max. Amo...	Min. Amou...	Original a...
1.0	Line: Worker group (highlighted)	Valid for (highlighted)	0.00	*		0.00	Output	0.00	0.00	

Context menu for Line: Worker group:

- Form information
- Personalize: Worker group
- Export all rows
- Export marked rows
- Insert columns...
- Group by this column
- Freeze column
- Hide this column
- View shortcuts
- View details

Finance and Operations > Save > New > Delete > Update > Options

Standard view > **Worker groups**

Worker group	Description
MSDer_Travel_Allowance_W.Gr...	Worker Group, Travel Allow...

Criteria

Workers: General

+ Add line Remove

Suspended	Personnel number	Worker	Department	Job type	Job level	Title	Marital status
□	555351	MSDers Employee Worker 1					None
□	555362	MSDers Employee Worker 2					None
□	555363	MSDers Employee Worker 3					None
□	555354	MSDers Employee Worker 4					None

Total: 4 rows

Results

Personnel number	Worker	Name	Name	Name	Birth date	Location	Employment category
555351	MSDers Employee Worker 1						MSDers Emp-Category 1
555352	MSDers Employee Worker 2						MSDers Emp-Category 1
555353	MSDers Employee Worker 3						Intern
555354	MSDers Employee Worker 4						

CAI3_ERP8_G3 MSD HCM Application Consultant/Management &ERP

Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



The screenshot shows the 'Allowances' screen in the Microsoft Dynamics 365 HR & Payroll application. A new allowance record is being created for 'MSDers_Travel_Allowance'. The 'Allowance ID' is set to 'MSDers_Travel_Allowance', 'Description' is 'Travel Allowance- Graduation project o...', and 'Item ID' is 'MSDers_Travel_Allowance_P...'. The 'Suspended' checkbox is unchecked. Under 'General' settings, 'Pay Periods' are defined for 'Table' and 'Valid for workers' is also set to 'Table'. The 'Pay code' is 'MSDers_Basic_Salary'. In the 'Calculation lines' section, a single line is present with 'Line Worker group' set to 'MSDers_Travel_Allowance_W...'. The 'Valid for' dropdown is set to 'Group', 'Amount: Item ID' is '000.00', 'Group ID' is 'MSDers_Travel_Allowance_G...', 'Percent: Limit type' is '0.00 Output', 'Max. Amount' is '0.00', and 'Min. Amount' is '0.00'. The 'Original amount' checkbox is unchecked.

This screenshot shows the same allowance record 'MSDers_Travel_Allowance' being created. The 'Allowance ID' is now 'MSDers_Travel_Allowance', 'Description' is 'Travel Allowance- Graduation project o...', and 'Item ID' is 'MSDers_Travel_Allowance_P...'. The 'Suspended' checkbox is checked. The 'Pay Periods' and 'Valid for workers' settings remain the same. In the 'Calculation lines' section, the line has been modified: 'Line Worker group' is now 'MSDers_Travel_Allowance_G...', 'Valid for' is 'Group', 'Amount: Item ID' is '0.00', 'Group ID' is 'MSDers_Travel_Allowance_G...', 'Percent: Limit type' is '30.00 Output', 'Max. Amount' is '0.00', and 'Min. Amount' is '0.00'. The 'Original amount' checkbox is checked.

This screenshot shows the allowance record 'MSDers_Travel_Allowance' again. The 'Allowance ID' is 'MSDers_Travel_Allowance', 'Description' is 'Travel Allowance- Graduation project o...', and 'Item ID' is 'MSDers_Travel_Allowance_P...'. The 'Suspended' checkbox is checked. The 'Pay Periods' and 'Valid for workers' settings are identical. In the 'Calculation lines' section, the line has been further modified: 'Line Worker group' is 'MSDers_Travel_Allowance_G...', 'Valid for' is 'None', 'Amount: Item ID' is '0.00', 'Group ID' is 'MSDers_Travel_Allowance_G...', 'Percent: Limit type' is '30.00 Output', 'Max. Amount' is '0.00', and 'Min. Amount' is '0.00'. The 'Original amount' checkbox is checked.

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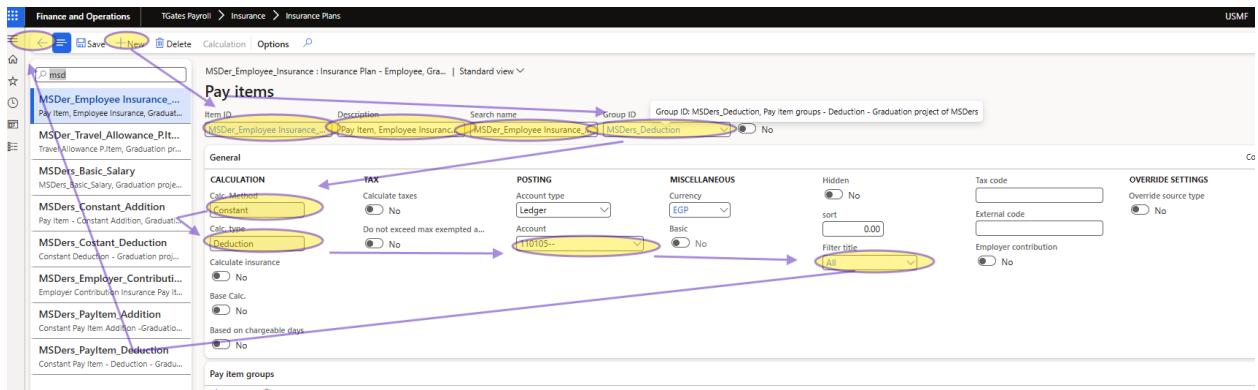
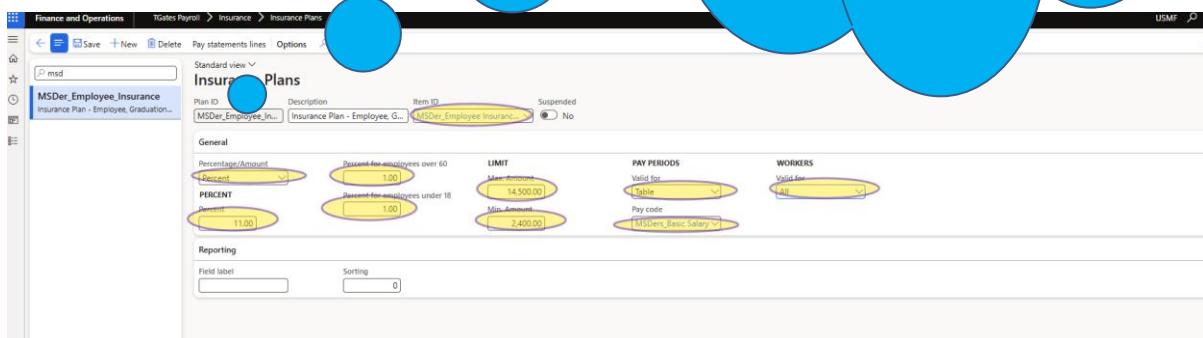
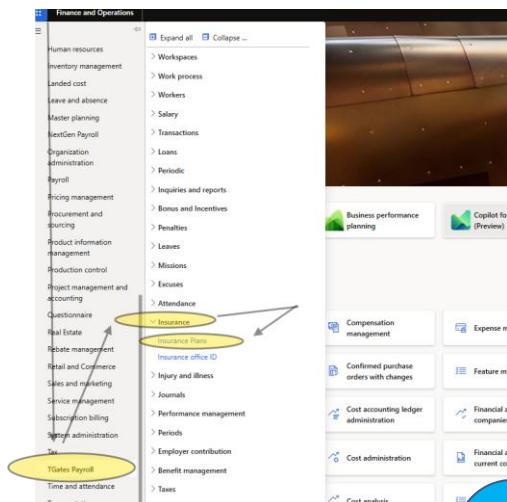
Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Insurance plans

TGates payroll > Insurance > Insurance plans



1. Click on "New".
2. Enter the insurance plan ID "Plan ID" and the description "Description" and then we select the insurance fee item "Item ID".
3. In "General":
 - We enter the percentage of the insurance plan for those between 18 and 60 years old "Percent".
 - We enter the percentage of workers over the age of 60 "Percent for employees over 60".
 - We enter the percentage of workers under the age of 18 "Percent for employees under 18".

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Employer Contribution

The screenshot shows the 'Insurance Plans' screen in the Microsoft Dynamics 365 HR & Payroll module. A new insurance plan is being created with the following details:

- Plan ID:** MSDer_Employer_Cont_Ins_Plan
- Description:** Insurance Plan, Employer Contribution
- Item ID:** MSDer_Employer_Cont_Ins_Plan
- Suspended:** No
- General:**
 - Percentage/Amount: Percent
 - Percent for employees over 60: 0.00
 - Percent for employees under 18: 0.00
 - Percent: 0.00
 - Max. Amount: 0.00
 - Min. Amount: 0.00
- PAY PERIODS:** Valid for Table
- WORKERS:** Valid for Table, Pay code MSDers_Basic_Salary

The screenshot shows the 'Pay items' screen. A new pay item is being configured with the following details:

- Item ID:** MSDer_Employer_Cont_PItem
- Description:** Pay item, Employer Contribution
- Search name:** MSDer_Employer_Cont_PItem
- Group ID:** MSDer_Deduction
- Calc. Method:** Constant
- Calc. type:** Deduction
- Calculate taxes:** No
- Do not exceed max exempted amount:** No
- Account type:** Ledger
- Account:** 110105--
- MISCELLANEOUS:**
 - Currency: EGP
 - sort: 0.00
- EMPLOYER CONTRIBUTION POSTING:**
 - Employer contribution ID: All
 - Tax code:
 - External code:
 - Employer contribution: Yes

The screenshot shows the 'Insurance Plans' screen again, this time with the configuration of a pay item for employer contribution:

- Item ID:** MSDer_Employer_Cont_PItem
- Description:** Pay item, Employer Contribution
- Search name:** MSDer_Employer_Cont_PItem
- Group ID:** MSDer_Deduction
- General:**
 - CALCULATION:** Constant
 - TAX:** Calculate taxes: No
 - POSTING:** Account type: Ledger, Account: 110105--
 - BASIC:** Basic: No, Hidden: No, sort: 0.00
 - FILTER TITLE:** All
 - EMPLOYER CONTRIBUTION:** Employer contribution ID: All
 - OVERRIDE SETTINGS:** Override source type: No

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- As for the company's contribution, it is the same as the worker's share, but with the company's percentage (18.75) and a different deduction pay item, and the

Taxes

TGates payroll > Taxes > Tax Periods

The screenshot shows the Microsoft Dynamics 365 interface. On the left, the 'Finance and Operations' navigation bar is visible, with 'Taxes' and 'Tax periods' highlighted. The main area displays various application tiles such as Human Resources, Invoice capture, Inventory Visibility, Recruiting add-on (Preview), Leave and absence, Recruitment management, Ledger budgets and forecasts, Released product maintenance, Maintenance request management, Reservation management, and مستلزمات إنتاج (Manufacturing Requirements). The background features a large, abstract metallic structure.

The screenshot shows the 'Tax periods' list page. A callout bubble highlights the 'Tax item ID' column, which contains items like 'Safer12_TaxPeriod', 'taxes_1', 'taxes_2025', 'ibrahim2025 taxes', 'Taxes A Moharram', 'taxes mahmoud', 'Taxes_2010_Haitam', 'Taxes_2023 SHRIN', 'Taxes_2016_Habiba', 'taxes_2010', 'taxes_2016', 'taxes_2023', and 'taxes_2025'. Other columns include 'Period ID', 'Description', 'From date', 'To date', 'Personal exemption amount', 'Disability exempted amount', 'Max deduction...', 'Average', and 'Include Suppl...'. The 'From date' and 'To date' columns for the first record are circled in red.

1. Select the "Tax item ID" item.
2. Enter the personal exemption amount.
3. Enter the personal exemption amount for the disabled (5%) "Disability expressed amount"

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Item ID	Description	Search name	Group ID	Group ID: Safw12_Deductin, Sep 4, 25 Session, Deduction Pay item Group
Safw12_TaxPayItem	Safw12_Tax Pay Item, Sep 25, 2024	Safw12_Tax Pay Item, Sep 25, 2024	Safw12_Deductin	No

Period ID	Description	From	To date	Tax Item ID	Personal exemption amount	Disability exempted amount	Max deduction...	Average	Include Supple...
Safw12_TaxPeriod	Safw12_TaxPeriod, Sep 25, 2025 ...	1/1/2025	12/31/2025	Safw12_TaxPayItem	20,000.00	80,000.00	0.00	0.00	<input type="checkbox"/>
مباركا	مباركا	1/1/2024	12/31/2024	1_مسا	20,000.00	30,000.00	0.00	0.00	<input type="checkbox"/>
2024	2024	1/1/2024	12/31/2024	Taxes	20,000.00	30,000.00	0.00	0.00	<input type="checkbox"/>
ibrahim2025 taxes	ibrahim2025	1/1/2025	12/31/2025	Taxes A Moharram	20,000.00	30,000.00	0.00	0.00	<input type="checkbox"/>
Taxes mahmoud	taxes mahmoud	1/1/2025	12/31/2025	taxes mahmoud	20,000.00	30,000.00	0.00	0.00	<input type="checkbox"/>
Taxes_2010_Hait...	Taxes_2010_Hait...	1/1/2010	12/31/2010						<input type="checkbox"/>
Taxes_2023_SHRIN	Taxes_2023 SHRIN	1/1/2040	12/31/2040						<input type="checkbox"/>
Taxes-2016-Hab...	Taxes-2016	1/1/2016	12/31/2016						<input type="checkbox"/>
توفيق	توفيق	1/1/2050	12/31/2050						<input type="checkbox"/>
حربي	حربي	1/1/2025	12/31/2025						<input type="checkbox"/>

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Finance and Operations TGate Payroll > Taxes > Tax periods USMF

[Save](#) [New](#) [Delete](#) [Options](#) [Filter](#)

Tax segments
Standard view ▾

General

Segment	Description	Amount from	Amount to
1	Safw1Z_From EGP1 Up to EGP600k	1.00	600,000.00
2	Safw1Z_More than EGP600k Up to EGP700k	600,001.00	700,000.00
3	Safw1Z_More than EGP700k Up to EGP800k	700,001.00	800,000.00
4	Safw1Z_More than EGP800k Up to EGP900k	800,001.00	900,000.00
5	Safw1Z_More than EGP900k Up to EGP1.2m	900,001.00	1,200,000.00
6	Safw1Z_More than 1.2m	1,200,000.01	999,999,999.99

Calculation details

+ Add line [Remove](#)

Line	Amount from	Amount to	Percent
1.0	1.00	40,000.00	0.00
2.0	40,001.00	55,000.00	10.00
3.0	55,001.00	70,000.00	15.00
4.0	70,001.00	200,000.00	20.00
5.0	200,001.00	400,000.00	22.50
6.0	400,001.00	600,000.00	25.00

Salary Plans

The screenshot shows the Microsoft Dynamics 365 interface for Finance and Operations. On the left, there is a navigation menu with various modules like Payroll, Pricing management, Procurement and sourcing, etc. Under the 'TGates Payroll' section, 'Salary Plans' is highlighted with a red circle. The main content area shows a hierarchical list of salary plan components: Workspaces, Work process, Workers, Salary (highlighted with a red circle), Salary Entry, Employees salary lines, Allowances, and Salary Plans (highlighted with a yellow circle). To the right, there is a grid of various application tiles, including Human Resources, Invoice capture, Inventory Visibility, Recruiting add-on (Preview), Leave and absence, Recruitment management, Ledger budgets and forecasts, Released product maintenance, Maintenance request management, Reservation management, and التسجيلات التجارية (Commercial Registration). A large image of a modern building's curved facade is displayed at the top right.

The screenshot shows the 'Salary Plans' creation screen. At the top, there is a filter bar with fields for 'Plan ID' (Safw12_Fund) and 'Description' (Safw12 Fund, Sep 27 2025). Below this is a 'General' section with fields for 'Pay periods' (Valid for Table), 'Valid for workers' (Table), 'Plan ID' (Item ID), and 'Max. Amount'. A 'View details' button is also present. The main area shows a table for 'Calculation lines' with columns for 'Line', 'Valid for', 'Item ID', 'Group ID', '+Amount', 'Percent', and 'Open'. A blue callout bubble on the right contains the following steps:

1. Click on "New".
2. Enter the plan ID "Plan ID" and the description "Description" and then we select the plan's pay item "Item ID".

In "General":

- Pay periods: We choose "Valid for = Table" and choose the pay period "Pay code" in which the calculation takes place, or we choose "Valid for = All" to calculate in all periods.

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Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



The screenshot shows the 'Salary Plans' configuration screen. A specific plan, 'Safwan1ZFundSalaryPlan', is selected and highlighted with a red oval. The 'General' section shows the plan's details: Pay Period is 'Safwan1Z_Pay_Period', Valid for workers is set to 'Table' and 'All', and the Plan Limit is set to 'Output'. The 'Calculation lines' section contains two entries: one for a wage item 'Payment_Add' with a value of 100.00 and a percentage of 0.05, and another for a group 'Safwan1Z.Add.Pay.Items.Groups' with a value of 100.00 and a percentage of 0.05. A red circle highlights the 'Workers' button at the bottom left of the calculation lines area.

- Valid for workers "Valid for workers" We choose "Table", "All" or "Worker group".

If you choose "Valid for workers = All", all workers will be counted.

- Limit for plan "Plan limit" We choose the limit type "Limit type":

1- Output Base: The minimum and maximum limits are applied to the basis on which the equation is based.

2- Validity: This rule specifies that the calculation is only applied to workers whose base amount value is within the minimum and maximum limits.

- Percentage: The last result is multiplied by the percentage.

The screenshot shows the same 'Salary Plans' configuration screen. A specific plan, 'Safwan1ZFundSalaryPlan', is selected. In the 'Workers' section, a worker named 'Safwan Z Zahran' is listed and highlighted with a red oval. The 'Number of dependents' field is checked, indicating the plan includes dependents. The rest of the configuration is identical to the first screenshot.

In "Calculation Lines":

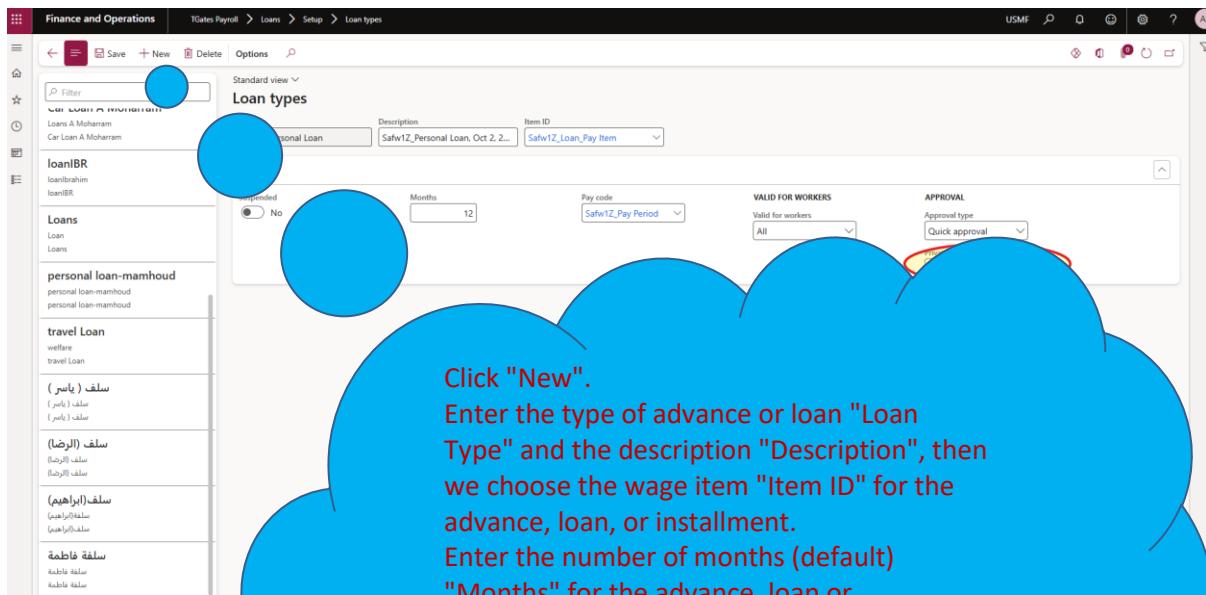
- We click on "Add Line".
- Choose the wage item ID or group of items and the percentage "Percent" (or the percentage equals zero, i.e. one hundred).

The amount "+Amount" can be entered and added to the item's output multiplied by the ratio "Percent".

- If you choose "Valid for workers = All", only workers who are entered in "Workers" will be counted.
- We click on "Add Line" and list the workers.
- We select "Worker" in the "Valid for" box and select the shared employee.

Setup loan types

TGates payroll > Loans > Setup > Loan types



Click "New".

Enter the type of advance or loan "Loan Type" and the description "Description", then we choose the wage item "Item ID" for the advance, loan, or installment.

Enter the number of months (default) "Months" for the advance, loan or installment, which can be changed when recording the movement on the employee. Enter the "Pay Code" payment period in which the advance, loan or installment amount is deducted (it can be changed for an employee in a specific month).

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Employee loans transactions

TGates payroll > Loans > All loans

The screenshot shows the Microsoft Dynamics 365 interface. The left sidebar has a tree view of various modules like Payroll, Pricing management, and TGates Payroll. Under TGates Payroll, there's a 'Loans' node which has a 'All loans' link under it, both of which are circled in red. The main area shows a grid of cards for different features: Human Resources, Invoice capture, Inventory Visibility, Recruiting add-on (Preview), Leave and absence, Recruitment management, أواامر التوريد (Arabic), Ledger budgets and forecasts, Released product maintenance, التسجيلات التعلية (Arabic), Maintenance request management, Reservation management, مصطلحات إنتاج (Arabic), and Resource lifecycle.

All loans
Standard view

Loan ID	Date	Personnel number	Worker	Description	Initial loan am.	Loan Amount	Months	From date	Period Amount
Loan-00015	10/4/2025	000003	Safwan Tawfiq	Safwan Tawfiq, Personal Loan, Oct 2, 2025	1,000.00	1,000.00	12	12/1/2025	83.33
Loan-00007	9/24/2025	100333	Ahmed Moharram Tawfiq	Car Loan A Moharram	250,000.00	250,000.00	12	9/24/2025	20,833.33
Loan-00008	9/24/2025	100333	Benjamin Martin	Car Loan A Moharram	300,000.00	300,000.00	12	9/24/2025	25,000.00
Loan-00002	9/9/2025	0105	2_احمد سليمان	Personal loan-sliman	200,000.00	200,000.00	48	9/9/2025	4,166.67
Loan-00022	9/1/2025	000003	Ali Christensen	personal loan-slimamhoud	12,000.00	12,000.00	12	9/1/2025	1,000.00
Loan-00017	8/24/2025	900900	إبراهيم محمد حسن	(Arabic)	100,000.00	100,000.00	12	8/24/2025	4,166.67
Loan-00013	8/23/2025	10001000	سارة ناصر	(Arabic)	0.00	100,000.00	12	1/1/2050	8,333.33
Loan-00018	8/23/2025	P002016	Nafisa elsayed abu hegazy	نفيسة عابد هغازي	0.00	100,000.00	12	1/1/2026	8,333.33
Loan-00011	8/21/2025	101010	Abdullah Ali Mohamed	سلفي (Arabic)	0.00	100,000.00	12	1/1/2040	8,333.33
Loan-00017	8/20/2025	0105214	T_hosseini mahmoud Mostafa	تميم محمود متوفى	30,000.00	30,000.00	12	8/20/2025	2,500.00
Loan-00013	8/14/2025	000963	Benjamin Martin	بنجامن مارتن	0.00	50,000.00	12	8/14/2025	4,166.67
Loan-00001	8/1/2025	000003	Ibrahim mohamed hassan	إبراهيم محمد حسان	100,000.00	50,000.00	12	8/19/2025	4,166.67
Loan-00001	8/1/2025	000003	Mohamed Yasser Othman	محمد ياسر عثمان	100,000.00	50,000.00	12	8/19/2025	2,083.33
Loan-00001	8/1/2025	000003	Ted Howard	ted howard	24,000.00	24,000.00	12	8/1/2025	2,000.00
Loan-00001	8/1/2025	000003	Loan hosseini	لهم حسني	200,000.00	200,000.00	24	8/1/2025	8,333.33

Click "New".

Choose the type of advance or loan.

The advance ID and date are entered automatically and can be modified.

Enter the worker's number or the worker's name.

Enter the total loan or advance amount.

The number of months "Months" and the payment period "Pay code" are automatically entered with what was previously linked to the advance type "Loan type".

The remaining fields are entered automatically and can be modified. When modified, the fields associated with that modification are also automatically modified.

CAI3_ERP8_G3 MSD HCM Application Consultant/Management &ERP

Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



The screenshot shows a Microsoft Dynamics 365 interface for managing loans. At the top, there's a navigation bar with 'Finance and Operations', 'T-Gates Payroll', 'Loans', and 'All loans'. Below the navigation is a toolbar with 'Actions', 'Suspend', 'Split', and 'Print'. On the right, there are options for 'Page options', 'Share', 'Power Automate', 'Security diagnostics', 'Advanced filter or sort', 'Create a custom alert', 'Manage my alerts', and 'Record info'. The main area displays a table titled 'Standard view' with columns: 'Loan type', 'Loan ID', 'Name', 'Date', 'Pay code', 'Period code', 'Period Amount', 'Item ID', 'Deducted', 'Suspended', and 'Split'. The table lists multiple entries for 'Safe12_Personal Loan' with various dates and pay codes. A large blue callout bubble on the right side of the table contains the following text:

- Payment can be deferred for a specific month.
- The "Split" installment for a specific month can also be divided into other installments other than the basic disbursement of the advance.

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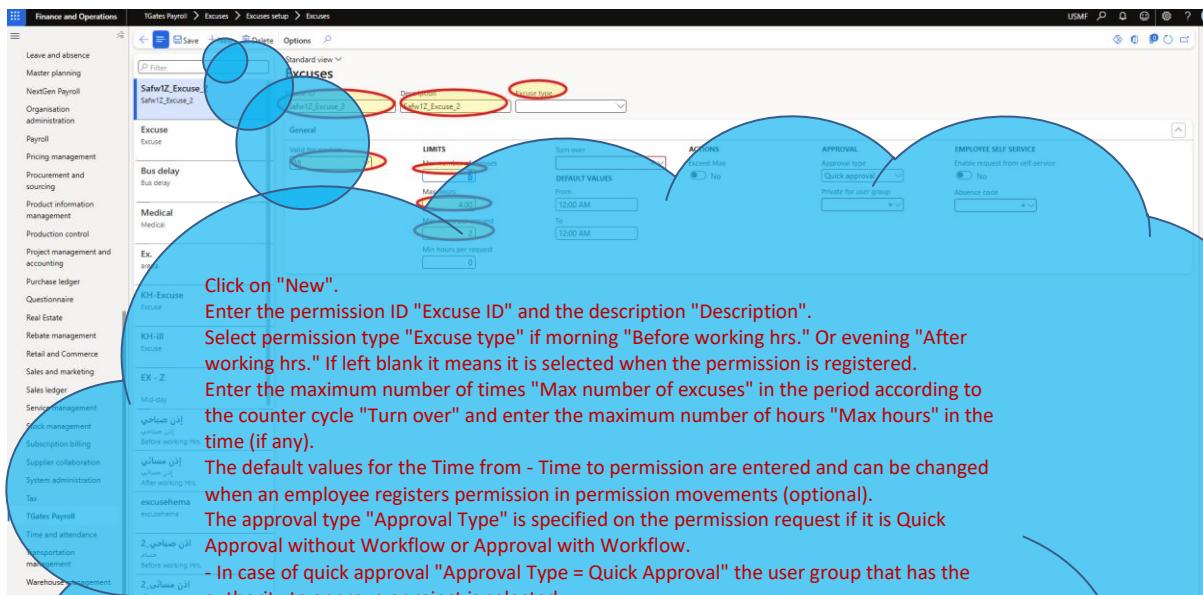
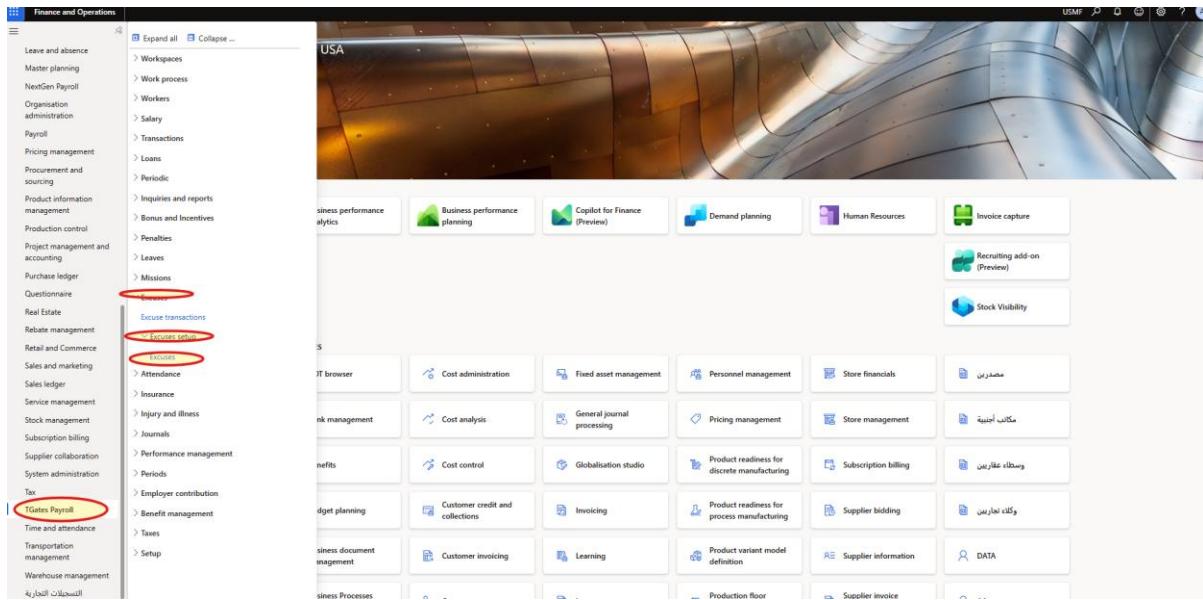
Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Excuse setup

TGates payroll > excuses > Excuse setup > Excuses



Excuse transactions

TGates payroll > excuses > Excuse transactions

Click on "New".
Choose the permission ID "Excuse ID" and choose the worker "Worker".
Enter the date "Date" and the start time of "From Time" and the end time of "To Time" permission (they are automatically entered when you choose the permission ID "Excuse ID" from the default permission values and can be modified).
Choose the permission type "Excuse type".

Request ID	Excuse ID	Personnel number	Worker	Date	From time	To time	Duration	Status	Description
USMF-000000204	AK excuse	1112233	Ahmed Mohamed Khalil	09/10/2025	07:00	08:00	1 hour	Draft	
USMF-000000203	Excuse A Moharram	100333	Ahmed Moharram Tawfiq	09/10/2025	08:00	09:00	1 hour	Approved	
USMF-000000207	Excuses-omnia	1010	Omnia Ashraf Mohamed	09/10/2025	08:00	09:00	1 hour	Approved	
USMF-000000209	Excuses-omnia	1010	Omnia Ashraf Mohamed	09/10/2025	14:00	15:00	1 hour	Approved	
USMF-000000206	Safwan Z Excuse	007777	Safwan Z Zahran	09/10/2025	08:00	10:00	2 hours	Approved	Oct 09, 2025
USMF-000000199	Excuse-mahmoud	000001	Jodi Christiansen	09/10/2025	08:00	10:00	2 hours	Approved	
USMF-000000186	Excuse	12012	Mohamed Yasser Othman	25/09/2025	08:00	10:00	2 hours	Approved	
USMF-000000104	USMF-excuse	000000	Khalid Faisal	18/10/2025	16:00	17:00	1 hour	Approved	

Missions Setup

TGates payroll > Mission > Mission setup > Mission categories

The screenshot shows the Microsoft Dynamics 365 interface. The left sidebar navigation includes 'Leave and absence', 'Master planning', 'NextGen Payroll', 'Organization administration', 'Payroll', 'Pricing management', 'Procurement and sourcing', 'Product information management', 'Production control', 'Project management and accounting', 'Purchase ledger', 'Questionnaire', 'Real Estate', 'Rebate management', 'Retail and Commerce', 'Sales and marketing', 'Sales ledger', 'Service management', 'Stock management', 'Subscription billing', 'Supplier collaboration', 'System administration', 'Tax', 'TGates Payroll' (highlighted with a red circle), 'Time and attendance', 'Transportation management', and 'Warehouse management'. The main content area shows various business applications like Business performance planning, Copilot for Finance (Preview), Demand planning, Human Resources, Invoice capture, Recruiting add-on (Preview), and Stock visibility. The 'Mission categories' link under 'Mission setup' is also highlighted with a red circle.

The screenshot shows the 'Missions categories' list screen. The left sidebar is identical to the previous one. The main area displays a list of mission categories. A blue callout bubble contains the text: "Click on 'New'. Enter the mission classification 'Mission category' and description 'Description'". A red circle highlights the 'New' button at the top left of the list screen. Another red circle highlights the 'Mission category' and 'Description' fields for the entry 'Safwa12_Mission'. The 'Save' button at the top left is also highlighted with a red circle.

Category	Description
Safwa12_Mission	Safwa12_Mission
mission - mahmoud	mission - mahmoud
Outside	Outside country - Z
Outside Egypt	abroad - reda
Outside Egypt Ba...	Outside Egypt Bakkar
outsidegyptbakk...	outsidegyptbakk...
خارج الارض	خارج الارض
داخل الارض	داخل الارض
الخارجية	الخارجية

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Project: Payroll Integration Simulation

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Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



The screenshot shows the Microsoft Dynamics 365 HR & Payroll application. The left sidebar lists various modules like Finance and Operations, Payroll, and Time and attendance. The main area is titled 'Mission types' under 'T Gates Payroll > Missions > Missions setup'. It shows a list of mission types such as 'Safw12_Mission', 'Safw12_Categor', '001245 Outside', etc. A new mission type is being created with the ID '001245 Outside' and description ' داخل القاهرة, مصر'. The category is 'Safw12_Mission'. In the 'APPROVAL' section, 'Approval type' is set to 'Quick approval' and 'User for user group' is set to 'mahmoud'. Under 'EMPLOYEE SELF SERVICE', 'Enable request from self-service' is checked. The location is 'Egypt'. The 'Actual period type' is 'Full period' and the absence code is 'Safw12_Abs'. A large blue cloud graphic covers the right side of the screen, containing the following text:

Click on "New".
Enter the mission ID and description.
Select the mission category.
The approval type "Approval Type" is specified on the mission request if it is Quick Approval without Workflow or Workflow Approval.
- In case of quick approval "Approval Type = Quick Approval" the user group that has the authority to approve or reject is selected.
- In the workflow approval "Workflow" "Workflow ID" is selected.
Determine if the mission is available to submit requests through the employee's self-service "Enable request from self-service".

CAI3_ERP8_G3 MSD HCM Application Consultant/Management &ERP
Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Missions transactions

TGates payroll > Mission > Missions transactions

The screenshot shows the Microsoft Dynamics 365 interface. On the left, the navigation menu is open, showing various modules like 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, Questionnaire, Real Estate, Rebate management, Retail and Commerce, Sales and marketing, Sales ledger, Service management, Stock management, Subscription billing, Supplier collaboration, System administration, Tax, TGates Payroll (highlighted with a red oval), Time and attendance, Transportation management, and Warehouse management. The 'TGates Payroll' module is expanded, and the 'Missions' and 'Mission Transactions' links are highlighted with red ovals. The main area displays a dashboard with various tiles for Business performance planning, Copilot for Finance (Preview), Demand planning, Human Resources, Invoice capture, Recruiting add-on (Preview), and Stock Visibility. Below the dashboard is a grid of smaller tiles for IT browser, Cost administration, Fixed asset management, Personnel management, Store financials, Workforce management, Bank management, Cost analysis, General journal processing, Pricing management, Store management, مكتاب احتفظ, Journals, Periods, Employer contribution, Benefit management, Taxes, Setup, Benefits, Cost control, Globalisation studio, Product readiness for discrete manufacturing, Subscription billing, Supplier bidding, وظائف عاملين, Business document management, Customer credit and collections, Invoicing, Product readiness for process manufacturing, Customer invoicing, Learning, Product variant model definition, Supplier information, and DATA.

The screenshot shows the 'Mission Transactions' screen. At the top, there are buttons for Save, New, Delete, Approval, End, Details, Options, and Filter. The main area is titled 'Standard view' and shows a table of mission transactions. The columns include Personnel number, Worker, Start date/time, End date/time, Mission status, Expected return date, Description, Approval Status, Location, and Accommodation type. The table lists several entries, such as Khaled Faisal Ghaneem, Jodi Christiansen, Mohamed Yasser Othman, and others. A large blue callout bubble points to the 'New' button and contains the following text: 'Click on "New". Worker selection. Select "Mission Type". Enter the start and end dates and times of the mission.'

Leaves Setup

TGates payroll > Leaves> Setup > Leaves

Click on "New".
 Enter leave type and description description.
 The approval type "Approval Type" is specified on the leave request if it is Quick Approval without Workflow or Approval with Workflow.

- In case of quick approval "Approval Type = Quick Approval" the user group that has the authority to approve or reject is selected.
- In the workflow approval "Workflow" "Workflow ID" is selected.

Determine if leave is available for applications through the employee's self-service "Enable request from self-service".

Determine if leave requires a "Require Attachment" facility when requesting leave, such as for patients.

Determine whether the leave is with a "Require Balance" balance or not.

Specify whether weekends are calculated from the "Include Weekends" balance (Friday and Saturday).

Specify whether official holidays are calculated from the balance "Include official holidays" (holidays).

Enter the number of months for the balance due for new assignments "Balance consumption will start after # months for new hours".

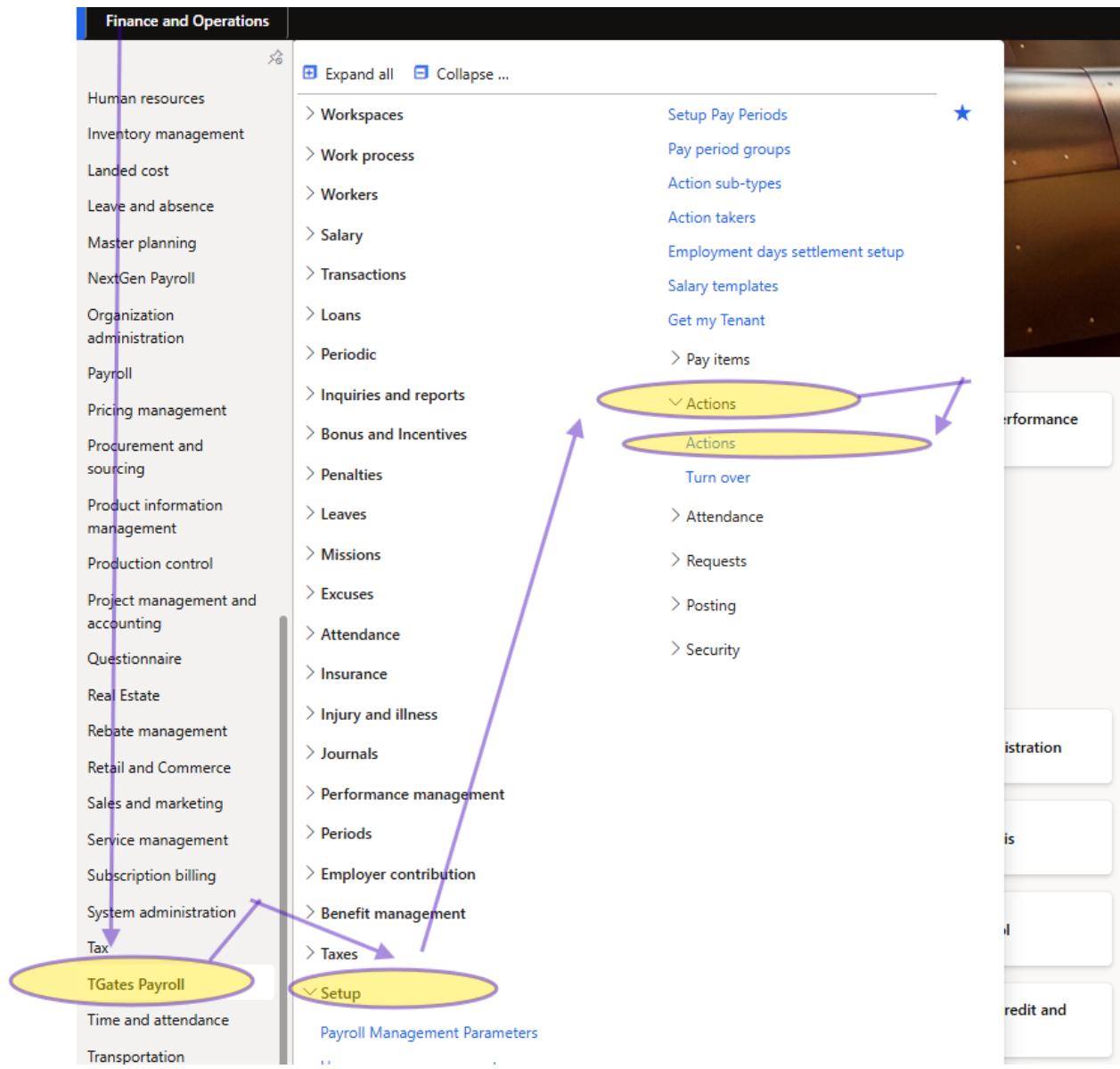
Enter the maximum number of days allowed per week "Max Weekly Days".

Enter the maximum number of days allowed per month "Max monthly days".

Enter the maximum number of days allowed per year "Max annual days".

Attendance Policy

TGates payroll > Setup > Attendance > Attendance policy



CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

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Actions

Action ID: Safw1Z_Action_Warning_Justified
Description: Attendance Policy, Action, 20...
Action type: Hourly

Salary action details

Item ID: Safw1Z_Unjustified_Absence
Calculation ID: Safw1Z_Payitem_Add
Quantity: 1.00
Fixed quantity: 0.00
Max hours: 0.00
Unit: Hour
Reverse Pay item ID:
Reverse Item calculation ID:
View details

Standard view

- 00003 Excuse Walaa
- 1 Day 1 Day
- 1/2 Day 1/2 Day
- 1/4 Day 1/4 Day
- 2 خصم يوم كامل حسام
- 3/4 Day 3/4 Day
- Absence Absence

Pay items

Item ID: Safw1Z_Unjustified_Absence
Description: Pay item, Attendance Policy,...
Search name: Pay item, Group ID: Safw1Z_Deductin
Suspended: No

General

Calculation: Calc Method: Variable, Calc type: Deduction
Calculate taxes: No
Do not exceed max exempted a...
Hidden: No
Sort: 1.00
Filter table: All
Tax code:
External code:
Override settings: Employer contribution: No

Pay item groups

+ Add line Remove
Group ID: Safw1Z_Deductin Description: Sep 4, 25 Session, Deduction Pay Item Group Default:
Pay item: Safw1Z_Unjustified_Absence

Accounting

+ Add line Remove
Account type: Ledger Account: 110105-- Valid for: All Worker: Department:

Safw1Z_Unjustified_Absence : Pay item, Attendance Policy,... | Standard view

Pay Item Calculation

Calculation ID: Safw1Z_Warning_P.item.Calc
Description: Pay Item Calculation, Attendance Policy, Action, 20...
Item ID: Safw1Z_Unjustified_Absence

General

CALCULATION: Calc Output: Hourly, Hour factor: 1.00, Update amount from source: No
LIMIT: Max. Amount: 0.00, Min. Amount: 0.00

Calculation Details

+ Add line Remove
Line num... ↑ Valid for: Item ID: Safw1Z_Payitem_Add Group ID: Safw1Z_Deductin Percent: 0.00 Operator: Original amount:
1.00: Table

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Pay Item Calculation

Line no...	Valid for	Item ID	Group ID	Percent	Operator	Original amount
1.00	Table	Safw1Z_PayItem_Add		100.00	+	<input checked="" type="checkbox"/>

Pay Item Calculation

Line no...	Valid for	Item ID	Group ID	Percent	Operator	Original amount
1.00	Table	Safw1Z_PayItem_Add		100.00	-	<input checked="" type="checkbox"/>

Pay Item Calculation

Line no...	Valid for	Item ID	Group ID	Percent	Operator	Original amount
1.00	Table	Safw1Z_PayItem_Add		100.00	-	<input checked="" type="checkbox"/>

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Pay items

Item ID	Description	Search name	Group ID	Suspended	
Safw1Z_Unjustified Absence	Pay item, Attendance Policy, 20251023...	Pay item, Attendance Policy, ...	Pay item,	Safw1Z_Deductin	No

General

CALCULATION	TAX	MISCELLANEOUS	Hidden	Filter title
Calc. Method: Variable	Calculate taxes: No	Currency: EGP	Sort: 1.00	All
Calc. type: Deduction	Do not exceed max exempted a...: No	Basic: No		Tax code:
Calculate insurance: No				

Pay item groups

+ Add line	Remove	Group ID	Description	Default
		Safw1Z_Deductin	Sep 4, 25 Session, Deduction Pay Item Group	✓

Actions

Action ID	Description	Action type
Safw1Z_Action_Warning_1Ju	Attendance Policy, Action, 20...	Hourly

Salary action details

Item ID	Calculation ID	Quantity	Fixed quantity	Max hours	Unit
Safw1Z_Unjustified Absence	Safw1Z_Warning_P.Item.Calc	1.00	0.00		

Actions

Action ID	Description	Action type
Safw1Z_1/4 day Deduction	Action, Attendance Policy, 20...	Hourly

Salary action details

Item ID	Calculation ID	Quantity	Fixed quantity	Max hours	Unit
Safw1Z_Unjustified Absence	Safw1Z_1/4 day Deduction	1.00	2.00		Hour

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Finance and Operations | TGates Payroll > Setup > Actions > Actions

Actions

Action ID	Description	Action type
Safw12_1/2 day_Deduction	Action, Attendance Policy, 20...	Hourly

Salary action details

Item ID	Calculation ID	Quantity	Fixed quantity	Max hours	Unit
Safw12_Unjustified Absence	Safw12_1/2 day_Deduction	1.00	4.00		Hour

Finance and Operations | TGates Payroll > Setup > Actions > Actions

Actions

Action ID	Description	Action type
Safw12_Full day_Deduction	Action, Attendance Policy, 20...	Hourly

Salary action details

Item ID	Calculation ID	Quantity	Fixed quantity	Max hours	Unit
Safw12_Unjustified Absence	Safw12_Full day_Deduction	1.00	8.00		Hour

OR

Finance and Operations | TGates Payroll > Setup > Actions > Actions

Actions

Action ID	Description	Action type
Safw12_Full day_Deduction	Action, Attendance Policy, 20...	Hourly

Salary action details

Item ID	Calculation ID	Quantity	Fixed quantity	Max hours	Unit
Safw12_Unjustified Absence	Safw12_Full day_Deduction	1.00	1.00		Day

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

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Finance and Operations

- Human resources
- Inventory management
- Landed cost
- Leave and absence
- Master planning
- NextGen Payroll
- Organization administration
- TGates Payroll**
- Pricing management
- Procurement and sourcing
- Product information management
- Production control
- Project management and accounting
- Questionnaire
- Real Estate
- Rebate management
- Retail and Commerce
- Sales and marketing
- Service management
- Subscription billing
- System administration
- Tax
- Setup**
- Time and attendance

Attendance

- Attendance Policy
- Working days calculation rules
- Absence codes
- Absence groups
- Attendance counter categories
- Working times
- Requests
- Posting
- Security

Finance and Operations

TGates Payroll > Setup > Attendance > Attendance Policy

Attendance Policy

Policy ID	Description
Safw1Z_Attendance Policy	Attendance Policy, 20251023 Session

General

- VALID FOR WORKERS: Valid for workers **All**
- PAY PERIODS: Valid for **Table**, Pay code **Safw1Z_Pay Period**
- EFFECTIVE DATE: Effective **03/11/2025**, Expiration **Never**

Policy Lines

Weekday: **Monday** **Tuesday** **Wednesday** **Thursday** **Friday** **Saturday** **Sunday**

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

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Attendance Policy

Policy ID	Description
Safw1Z_Attendance Policy	Attendance Policy, 20251023 Session

General

VALID FOR WORKERS	PAY PERIODS	EFFECTIVE DATE
Valid for workers: All	Valid for: Table	Effective: 03/11/2025
Worker group:	Pay code: Safw1Z_Pay_Period	Expiration: Never

Policy Lines

Weekday: Any day

Rule Type	Action ID	Rule Type	Counter Type	From	To	Turn over type	From 1	To Tim
Absence	Safw1Z_1/4 day_Deduction	Absence	Number of times	Every	1.00	Period	00:00	00:00
Absence	Safw1Z_Action_Warning_J...	Action ID	Safw1Z_Action_Warning_J...	From	1.00	Direction	Clock in	Recorr

Attendance Policy

Policy ID	Description
Safw1Z_Attendance Policy	Attendance Policy, 20251023 Session

General

VALID FOR WORKERS	PAY PERIODS	EFFECTIVE DATE
Valid for workers: All	Valid for: Table	Effective: 03/11/2025
Worker group:	Pay code: Safw1Z_Pay_Period	Expiration: Never

Policy Lines

Weekday: Any day

Rule Type	Action ID	Rule Type	Counter Type	From	To	Turn over type	From 1	To Tim
Absence	Safw1Z_1/4 day_Deduction	Absence	Number of times	Every	1.00	Period	00:00	00:00
Absence	Safw1Z_1/4 day_Deduction	Action ID	Safw1Z_1/4 day_Deduction	From	2.00	Counter category	Category 1	2.00

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Safw1Z_Attendance Policy

Attendance Policy

General	VALID FOR WORKERS	PAY PERIODS	EFFECTIVE DATE
Valid for workers: All	Valid for: Table	Effective: 03/11/2025	
Worker group:	Pay code: Safw1Z_Pay_Period	Expiration: Never	

Policy Lines

Weekday: Any day

+ Add line | Remove

Rule Type	Action ID	Rule Type	Counter Type	From	To	Turn over type
Absence	Safw1Z_1/2 day_Deduction	Absence	Number of times	3.00		Period
Absence	Safw1Z_1/4 day_Deduction	Action ID	Every	1.00	3.00	To Ti
Absence	Safw1Z_Action_Warning_J...					Reco

From: 00:00
To Ti: 00:00
Direction: Clock in
Cont: Any

Safw1Z_Attendance Policy

Attendance Policy

General	VALID FOR WORKERS	PAY PERIODS	EFFECTIVE DATE
Valid for workers: All	Valid for: Table	Effective: 03/11/2025	
Worker group:	Pay code: Safw1Z_Pay_Period	Expiration: Never	

Policy Lines

Weekday: Any day

+ Add line | Remove

Rule Type	Action ID	Rule Type	Counter Type	From	To	Turn over type	From time	To time	Recording status
Absence	Safw1Z_Full_day_Deduction	Absence	Number of times	4.00		Period	00:00	00:00	Any
Absence	Safw1Z_1/2 day_Deduction	Action ID	Every	1.00	999,999,999...	To			No
Absence	Safw1Z_1/4 day_Deduction								Continuous absence
Absence	Safw1Z_Action_Warning_J...								

From time: 00:00
To time: 00:00
Recording status: Any
Continuous absence: No

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

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Finance and Operations T-Gates Payroll > Setup > Attendance > Attendance Policy USMF

[Save](#) [New](#) [Delete](#) [Options](#)

Standard view ▾

Attendance Policy

Policy ID	Description						
Safw12_Attendance Policy	Attendance Policy, 20251023 Session						
General							
VALID FOR WORKERS	PAY PERIODS	EFFECTIVE DATE					
Valid for workers	Valid for	Effective					
All	Table	03/11/2025					
Worker group	Pay code	Expiration					
	Safw12_Pay Period	Never					
Policy Lines							
Weekday							
<input checked="" type="radio"/> Any day <input type="radio"/> Sunday <input type="radio"/> Monday <input type="radio"/> Tuesday <input type="radio"/> Wednesday <input type="radio"/> Thursday <input type="radio"/> Friday <input type="radio"/> Saturday							
<u>Any day</u>							
+ Add line Remove							
Rule Type	Action ID	Rule Type	Counter Type	From	To	Turn over type	From time
Absence	Safw12_Full_day_Deduction	Absence	Number of times	4.00		Period	00:00
Absence	Safw12_1/2 day,Deduction	Action ID	Every		999.999.999...	Direction	00:00
Absence	Safw12_1/4 day,Deduction		1.00			Clock in	00:00
Absence	Safw12_Action_Warning,J...					Recording status	Any
						Continuous absence	No

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

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Finance and Operations

- Human resources
- Inventory management
- Landed cost
- Leave and absence
- Master planning
- NextGen Payroll
- Organization administration
- Payroll
- Pricing management
- Procurement and sourcing
- Product information management
- Production control
- Project management and accounting
- Questionnaire
- Real Estate
- Rebate management
- Retail and Commerce
- Sales and marketing
- Service management
- Subscription billing
- System administration
- Tax
- TGates Payroll**
- Time and attendance
- Transportation management

Expand all Collapse ...

- > Workspaces
- > Work process
- > Workers
- > Salary
- > Transactions
- > Loans
- > Periodic
- > Inquiries and reports
- > Bonus and Incentives
- > Penalties
- > Leaves
- > Missions
- > Excuses
- > Attendance
 - Attendance**
 - Attendance processing**
- > Attendance Log
- > Absence registration
- > Update Attendance Daily Batch
- > Insurance
- > Injury and illness
- > Journals
- > Performance management
- > Periods
- > Employer contribution
- > Benefit management

A screenshot of the Microsoft Dynamics 365 Finance and Operations interface. The left sidebar shows a navigation tree with categories like Human Resources, Inventory Management, and Payroll. A yellow oval highlights the 'Attendance' node under the Payroll category. Another yellow oval highlights the 'Attendance processing' node under the same category. A purple arrow points from the 'TGates Payroll' node in the main navigation to the 'Attendance' node. A blue double-headed arrow is positioned between the two highlighted ovals. The right side of the screen displays a grid of cards for various modules: Business performance planning, Copilot for Finance (Preview), Compensation management, Expense management, Confirmed purchase orders with changes, Feature management, Cost accounting ledger administration, Financial analysis - all companies, Cost administration, Financial analysis - current company, Cost analysis, and Financial period close.

CAI3_ERP8_G3 MSD HCM Application Consultant/Management &ERP
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Finance and Operations | Sales Payroll > Attendance > Attendance processing

Standard view >

Attendance processing

OverView **Output**

Period ID From date To date
Feb 2026 01/01/2026 31/01/2026

+ Add line Remove Transfer to Pay ▾

Period ID	Pay code	Period code	Reference pay code	Reference Period C...	Calculate Leaves	Att. Calculated	Payroll calculated
Feb 2026	KHF-Salary	73	KHF-Salary	12			

Salary actions Leave actions Penalty actions

Approval ▾

Personnel number	Worker	Date	Item ID	Calculation ID	Days	Hours	Amount in...	Action ID	Rule Type	Description	Approval Status
2112	Khaled Faisal Ghanem	04/01/2026	Overtime	Day	0	2.000000	270.00	OvertimeDay	Overtime		Pending
2112	Khaled Faisal Ghanem	04/01/2026	Overtime	Night	0	3.000000	510.00	OvertimeNight	Overtime		Pending
P002010	Khaled Faisal	04/01/2026	Absence	Absence	1	8.000000	0.00	Absence	Absence		Approved
P002010	Khaled Faisal	05/01/2026	Absence	Absence	1	8.000000	0.00	Absence	Absence		Cancelled
P002010	Khaled Faisal	06/01/2026	Absence	Absence	1	8.000000	0.00	Absence	Absence		Approved
2112	Khaled Faisal Ghanem	08/01/2026	Absence	Absence	1	8.000000	1,000.00	Absence	Absence		Pending
P002010	Khaled Faisal	08/01/2026	Absence	Absence	1	8.000000	0.00	Absence	Absence		Pending
P002010	Khaled Faisal	11/01/2026	Absence	Absence	1	8.000000	0.00	Absence	Absence		Pending
2112	Khaled Faisal Ghanem	31/01/2026	Late	Late	0	2.000000	250.00	Late	Late		Pending
P002010	Khaled Faisal	12/01/2026	Absence	Absence	1	8.000000	0.00	Absence	Absence		Pending
P002010	Khaled Faisal	13/01/2026	Absence	Absence	1	8.000000	0.00	Absence	Absence		Pending
2112	Khaled Faisal Ghanem	13/01/2026	Overtime	Day	0	2.000000	270.00	OvertimeDay	Overtime		Pending
P002010	Khaled Faisal	14/01/2026	Absence	Absence	1	8.000000	0.00	Absence	Absence		Pending

CAI3_ERP8_G3 MSD HCM Application Consultant/Management &ERP

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The screenshot shows the Microsoft Dynamics 365 Finance and Operations interface. The left sidebar lists various modules: Human resources, Inventory management, Landed cost, Leave and absence, Master planning, NextGen Payroll, Organization administration, Payroll, Pricing management, Procurement and sourcing, Product information management, Production control, Project management and accounting, Questionnaire, Real Estate, Rebate management, Retail and Commerce, Sales and marketing, Service management, Subscription billing, System administration, Tax, TGates Payroll, and Time and attendance. The "Attendance" node under "Time and attendance" is highlighted with a yellow oval and has a blue arrow pointing to its sub-module "Attendance Log", which is also highlighted with a yellow oval. Other sub-modules listed under "Attendance" include Attendance processing, Absence registration, and Update Attendance Daily Batch. To the right of the main menu, there is a vertical column of cards representing other modules: Business performance planning, Compensation management, Confirmed purchase orders with changes, Cost accounting ledger administration, and Cost administration.

CAI3_ERP8_G3 MSD HCM Application Consultant/Management &ERP

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Attendance Log					
Standard view *					
<input type="text"/> Filter					
Personnel number	Worker	Date	Time	Direction	Source
2112	Khaled Faisal Ghanem	22/01/2026	15:00:00	Clock in	Manual
2112	Khaled Faisal Ghanem	22/01/2026	09:00:00	Clock in	Manual
2112	Khaled Faisal Ghanem	21/01/2026	17:00:00	Clock in	Manual
2112	Khaled Faisal Ghanem	21/01/2026	09:00:00	Clock in	Manual
2112	Khaled Faisal Ghanem	20/01/2026	17:00:00	Clock in	Manual
2112	Khaled Faisal Ghanem	20/01/2026	09:00:00	Clock in	Manual
2112	Khaled Faisal Ghanem	19/01/2026	15:00:00	Clock in	Manual
2112	Khaled Faisal Ghanem	19/01/2026	09:00:00	Clock in	Manual
2112	Khaled Faisal Ghanem	18/01/2026	17:00:00	Clock in	Manual
2112	Khaled Faisal Ghanem	18/01/2026	10:00:00	Clock in	Manual
2112	Khaled Faisal Ghanem	13/01/2026	19:00:00	Clock out	Manual
2112	Khaled Faisal Ghanem	13/01/2026	09:00:00	Clock out	Manual
2112	Khaled Faisal Ghanem	11/01/2026	17:00:00	Clock out	Manual
2112	Khaled Faisal Ghanem	11/01/2026	11:00:00	Clock out	Manual
2112	Khaled Faisal Ghanem	04/01/2026	22:00:00	Clock out	Manual
2112	Khaled Faisal Ghanem	04/01/2026	09:00:00	Clock out	Manual
2112	Khaled Faisal Ghanem	02/01/2026	19:00:00	Clock out	Manual
2112	Khaled Faisal Ghanem	02/01/2026	14:00:00	Clock out	Manual

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Finance and Operations

TGates Payroll > Setup > Attendance > Attendance Policy

Human resources
 Inventory management
 Landed cost
 Leave and absence
 Master planning
 NextGen Payroll
 Organization administration
 Payroll
 Pricing management
 Procurement and sourcing
 Product information management
 Production control
 Project management and accounting
 Questionnaire
 Real Estate
 Rebate management
 Retail and Commerce
 Sales and marketing
 Service management
 Subscription billing
 System administration
 Tax
TGates Payroll
 Time and attendance

Attendance Policy

Policy ID: Safw1Z_Attendance Policy | Description: Attendance Policy, 20251023 Session

General

VALID FOR WORKERS	PAY PERIODS
Valid for workers	Valid for Table
All	
Worker group	Pay code: Safw1Z_Pay Period

Policy Lines

Weekday: Any day Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Any day

[+ Add line](#) [Remove](#)

Rule Type	Action ID
Absence	Safw1Z_Action_Warning_J...
Absence	Safw1Z_1/4 day_Deduction
Absence	Safw1Z_1/2 day_Deduction
Absence	Safw1Z_Full day_Deduction

Finance and Operations TGates Payroll > Setup > Attendance > Attendance Policy

Human resources
Inventory management
Landed cost
Leave and absence
Master planning
NextGen Payroll
Organization administration
Payroll
Pricing management
Procurement and sourcing
Product information management
Production control
Project management and accounting
Questionnaire
Real Estate
Rebate management
Retail and Commerce
Sales and marketing
Service management
Subscription billing
System administration
Tax

TGates Payroll

Expand all Collapse ...

Workspaces Setup Pay Periods
Work process Pay period groups
Workers Action sub-types
Salary Action takers
Transactions Employment days settlement setup
Loans Salary templates
Periodic Get my Tenant
Inquiries and reports
Bonus and Incentives
Penalties
Leaves
Missions
Excuses
Attendance
Insurance
Injury and illness
Journals
Performance management
Periods
Employer contribution
Benefit management
Taxes

Actions
Actions
Turn over
Attendance
Requests
Posting
Security

Setup

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP
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Finance and Operations | TGates Payroll > Setup > Actions > Actions

Actions

Action ID	Description	Action type
Safw1Z_Late	Action, Attendance Policy, 20...	Hourly

Salary action details

Item ID	Open (Alt+Down)	Calculation ID	Quantity
*	*	*	*

Form information

- Personalize: Item ID
- View shortcuts
- View details**

Standard view

Excuse Walaa	1 Day	1/2 Day	1/4 Day	خصم يوم كامل 2
Excuse Walaa	1 Day	1/2 Day	1/4 Day	خصم يوم كامل 2

Finance and Operations | TGates Payroll > Setup > Actions > Actions

Pay items

Item ID	Description	Search name	Group ID	Suspended
Safw1Z_Late	P_item_Action, Attendance Po...	Safw1Z_Late	Safw1Z_Deductin	No

General

CALCULATION	TAX	MISCELLANEOUS	Hidden
Calc. Method: Variable	Calculate taxes: No	Currency: EGP	sort: 0.00
Calc. type: Deduction	Do not exceed max exempted a...: No	Basic: No	
Calculate insurance: No			

Pay item groups

+ Add line	Remove	Group ID	Description	Default
		Safw1Z_Deductin	Safw1Z_Deductin	

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Safw1Z_Late : P.Item_Action, Attendance Policy, 20251023 ... | Standard view ▾

Pay Item Calculation

Calculation ID: Safw1Z_Late **Description:** Pay Item Calculation, Action, Attendan... **Item ID:** Safw1Z_Late

General

CALCULATION: Hourly **Hour factor:** 1.00 **LIMIT:** Max. Amount: 0.00, Min. Amount: 0.00

Update amount from source: No

Calculation Details:

+ Add line Remove

Line num...	Valid for	Item ID	Group ID	Percent Operator	Original amount
1.00	Table	Safw1Z_PayItem_Add		100.00	

Finance and Operations | TGates Payroll > Setup > Actions > Actions

New Record | Standard view ▾

Pay items

Item ID: Safw1Z_Late **Description:** P.Item_Action, Attendance Po... **Search name:** Safw1Z_Late **Group ID:** Safw1Z_Deductin **Suspended:** No

General

CALCULATION: Variable **TAX:** Calculate taxes: No **MISCELLANEOUS:** Currency: EGP, Basic: No

Pay item groups:

+ Add line Remove

Group ID	Description	Default
Safw1Z_Deductin	Sep 4, 25 Session, Deduction Pay Item Group	✓

Finance and Operations | TGates Payroll > Setup > Actions > Actions

Standard view ▾

Actions

Action ID: Safw1Z_Late **Description:** Action, Attendance Policy, 20... **Action type:** Hourly

Salary action details:

Item ID	Calculation ID	Quantity	Fixed quantity	Max hours	Unit
Safw1Z_Late	Safw1Z_Late	1.00	0.00		Minute

Reverse Pay It: Reverse item:

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Project: Payroll Integration Simulation

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Finance and Operations

TGates Payroll > Setup > Attendance > Attendance Policy

Human resources
Inventory management
Landed cost
Leave and absence
Master planning
NextGen Payroll
Organization administration
Payroll
Pricing management
Procurement and sourcing
Product information management
Production control
Project management and accounting
Questionnaire
Real Estate
Rebate management
Retail and Commerce
Sales and marketing
Service management
Subscription billing
System administration
Tax

TGates Payroll (highlighted with a yellow oval)

Time and attendance

Standard view ▾

Attendance Policy

Policy ID	Description
Safw1Z_Attendance Policy	Attendance Policy, 20251023 Session

General

VALID FOR WORKERS	PAY PERIODS
Valid for workers	Valid for
All	Table
Worker group	Pay code
	Safw1Z_Pay Period

Policy Lines

Weekday

Any day Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Any day

+ Add line Remove

Rule Type	Action ID
Absence	Safw1Z_Action_Warning_J...
Absence	Safw1Z_1/4 day_Deduction
Absence	Safw1Z_1/2 day_Deduction
Absence	Safw1Z_Full day_Deduction

Safw1Z_Attendance Policy
Attendance Policy, 20251023 Session

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Finance and Operations TOales Payroll > Setup > Attendance > Attendance Policy

Counter type must be number of times or Minutes

Save + New Delete Options

Filter

NNC Late
NHC
KHF Policy
Attendance Policy Bakkar
Attendance Policy Bakkar
A. Moharam
A. Moharam
CAI3-ERP8
CAI3-ERP8
Eslam ELSayed Policy
Eslam ELSayed Policy
Nada Policy
Nada Policy
QP ATTENDANCE POLICY
QP ATTENDANCE POLICY
Early leave AK
Early leave AK
Safw1Z_Attendance Policy
Attendance Policy, 20251023 Session

Attendance Policy

Policy ID: Safw1Z_Attendance Policy Description: Attendance Policy, 20251023 ...

General

VALID FOR WORKERS	PAY PERIODS	EFFECTIVE DATE
Valid for workers: All	Valid for: Table	Effective: 03/11/2025
Worker group:	Pay code: Safw1Z_Pay Period	Expiration: Never

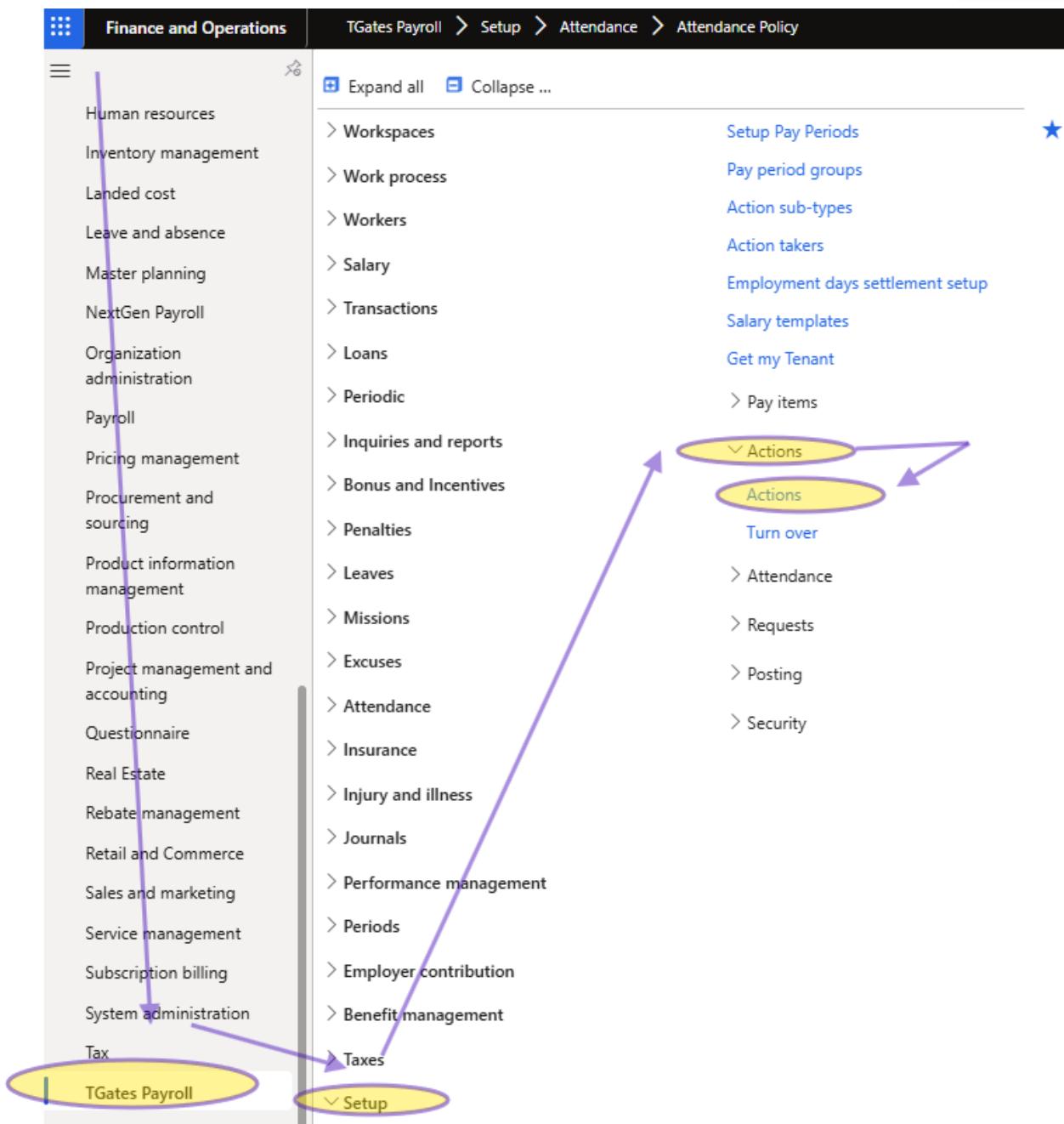
Policy Lines

Weekday: Any day (radio button selected)

Any day (radio button selected)

+ Add line Remove

Rule Type	Action ID	Rule Type	Counter Type	From	To	Turn over type	From time
Late	Safw1Z_Late	Late	Minutes	1.00		Period	08:01
Absence	Safw1Z_Action_Warning_J...	Action ID	Every	1.00	999,999,999...	Direction	To Time
Absence	Safw1Z_1/4 day_Deduction					Clock in	16:00
Absence	Safw1Z_1/2 day_Deduction					Recording status	Only In
Absence	Safw1Z_Full day_Deduction					Continuous absence	No



The screenshot shows the Microsoft Dynamics 365 Payroll application interface. The top navigation bar includes 'TGates Payroll', 'Setup', 'Attendance', and 'Attendance Policy'. On the left, a vertical navigation menu lists various modules: Human resources, Inventory management, Landed cost, Leave and absence, Master planning, NextGen Payroll, Organization administration, Payroll, Pricing management, Procurement and sourcing, Product information management, Production control, Project management and accounting, Questionnaire, Real Estate, Rebate management, Retail and Commerce, Sales and marketing, Service management, Subscription billing, System administration, Tax, TGates Payroll, and Setup. The 'TGates Payroll' and 'Setup' items are highlighted with yellow ovals. The main content area displays a hierarchical list of setup items under 'Attendance Policy', with several items circled in yellow and connected by arrows: 'Actions', 'Actions', 'Turn over', 'Attendance', 'Requests', 'Posting', and 'Security'. Other listed items include 'Setup Pay Periods', 'Pay period groups', 'Action sub-types', 'Action takers', 'Employment days settlement setup', 'Salary templates', 'Get my Tenant', 'Pay items', 'Inquiries and reports', 'Bonus and Incentives', 'Penalties', 'Leaves', 'Missions', 'Excuses', 'Attendance', 'Insurance', 'Injury and illness', 'Journals', 'Performance management', 'Periods', 'Employer contribution', 'Benefit management', and 'Taxes'.

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Finance and Operations | TGates Payroll > Setup > Actions > Actions

Actions

Action ID	Description	Action type
Safw1Z_Early Leave	Action, Attendance Policy, 20...	Hourly

Salary action details

Item ID	Calculation ID	Quantity
		1.00

View details

Finance and Operations | TGates Payroll > Setup > Actions > Actions

Pay items

Item ID	Description	Search name	Group ID	Suspended
Safw1Z_Early Leave	Pay Item Calculation, Action,...	Safw1Z_Early Leave	Safw1Z_Deductin	No

General

CALCULATION	TAX	MISCELLANEOUS
Calc. Method: Variable Calc. type: Deduction	Calculate taxes: No Do not exceed max exempted a...: No	Currency: EGP Basic: No Hidden: No sort: 0.00

Pay item groups

Group ID	Description	Default
Safw1Z_Deductin	Sep 4, 25 Session, Deduction Pay Item Group	✓

Finance and Operations | TGates Payroll > Setup > Actions > Actions

Pay Item Calculation

Calculation ID	Description	Item ID
Safw1Z_Early Leave	Pay Item Calculation, Action, Attenda...	Safw1Z_Early Leave

General

CALCULATION	HOUR factor	LIMIT
Calc. Output: Hourly	1.00	Max. Amount: 0.00 Min. Amount: 0.00

Calculation Details

Line num...	Valid for	Item ID	Group ID	Percent	Operator	Original amount
1.00	Table	Safw1Z_Payitem_Add		100.00	+	100.00

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Project: Payroll Integration Simulation

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Finance and Operations | TGates Payroll > Setup > Actions > Actions

Pay [Safw1Z_Early Leave Click to follow link]

Item ID: Safw1Z_Early Leave	Description: Pay Item Calculation, Action, ...	Search name: Safw1Z_Early Leave	Group ID: Safw1Z_Deductin	Suspended: No
General				
CALCULATION	TAX	MISCELLANEOUS	Hidden	Filter
Calc. Method: Variable	Calculate taxes: No	Currency: EGP	Basic: No	All
Calc. type: Deduction	Do not exceed max exempted a...: No	Calculate insurance:	sort: 0.00	Tax c...

Finance and Operations | Standard view ▾

Attendance Policy

Policy ID: **Safw1Z_Attendance Policy** Description: **Attendance Policy, 20251023 ...**

General

VALID FOR WORKERS	PAY PERIODS	EFFECTIVE DATE
Valid for workers: All	Valid for: Table	Effective: 03/11/2025
Worker group: A. Moharam	Pay code: Safw1Z_Pay Period	Expiration: Never

Policy Lines

Weekday: **Any day**

Rule Type : Leave Early Action ID: Safw1Z_Early Leave	Rule Type : Leave Early Counter Type: Minutes	From: 1.00	Turn over type: Period From time: 08:00
Absence: Safw1Z_Action_Warning_...	Action ID: Safw1Z_Early Leave	To: 999.999.999	Direction: Clock out To time: 16:00
Absence: Safw1Z_1/4 day_Deduction			Recording status: Only Out
Absence: Safw1Z_1/2 day_Deduction			Continuous absence: No
Absence: Safw1Z_Full day_Deduction			

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Finance and Operations

Counter type must be hours or attendance hours

[Save](#) [New](#) [Delete](#) [Options](#) [Search](#)

Standard view ▾

Attendance Policy

Policy ID: **Safw1Z_Attendance Policy** Description: **Attendance Policy, 20251023 ...**

General

VALID FOR WORKERS	PAY PERIODS	EFFECTIVE DATE
Valid for workers: All	Valid for: Table	Effective: 03/11/2025
Worker group:	Pay code: Safw1Z_Pay Period	Expiration: Never

Policy Lines

Weekday: Any day

+ Add line [Remove](#)

Rule Type	Action ID	Rule Type	Counter Type
Absence	Safw1Z_Action_Warning_Jlu]	Over time	Number of times
Absence	Safw1Z_1/4 day_Deduction	Action ID	Every
Absence	Safw1Z_1/2 day_Deduction		Form information
Absence	Safw1Z_Full day_Deduction		Personalize: Action ID
Leave Early	Safw1Z_Early Leave		View shortcuts
Over time			View details

of rows: 7 rows

Finance and Operations

TGates Payroll > Setup > Actions > Actions

[Save](#) [New](#) [Delete](#) [Options](#) [Search](#)

Standard view ▾

Actions

Action ID: **Safw1Z_Over Time** Description: **Action, Attendance Policy, 20...** Action type: Hourly

Salary action details Open (Alt+Down)

Item ID	Calculation ID	Quantity	Fix
		1.00	

Form information
 Personalize: Item ID
 View shortcuts
[View details](#)

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Finance and Operations | TGates Payroll > Setup > Actions > Actions

Pay items

General

CALCULATION

- Calc. Method: Variable
- Calc. type: Addition

TAX

MISCELLANEOUS

- Currency: EGP
- Basic: No

Hidden: No

Filter title: All

Sort: 0.00

Pay item groups

Pay Item Calculation

General

CALCULATION

- Calc. Output: Hourly
- Hour factor: 1.35
- Update amount from source: No

LIMIT

- Max. Amount: 0.00
- Min. Amount: 0.00

Calculation Details

Line num...	Valid for	Item ID	Group ID	Percent	Operator	Original amount
1.00	Table	Safw1Z_PayItem_Add		100.00	+	0.00

Finance and Operations | TGates Payroll > Setup > Actions > Actions

Safw1Z_P.ItemCalc_Over Time : P.item, Action, Attendance Poli... | Standard view

Pay Item Calculation

General

CALCULATION

- Calc. Output: Hourly
- Hour factor: 1.35
- Update amount from source: No

LIMIT

- Max. Amount: 0.00
- Min. Amount: 0.00

Calculation Details

Line num...	Valid for	Item ID	Group ID	Percent	Operator	Original amount
1.00	Table	Safw1Z_PayItem_Add		100.00	+	0.00

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Project: Payroll Integration Simulation

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Pay items

Item ID	Description	Search name	Group ID	Suspended
Safw1Z_PItem_Over Time	P.Item, Action, Attendance P...	Safw1Z_PItem_Over Time	Safw1Z_Add.Pay Items Gr...	No

General

CALCULATION	TAX	MISCELLANEOUS	Hidden
Calc. Method: Variable	Calculate taxes: No	Currency: EGP	Filter title: All
Calc. type: Addition	Calculate insurance: No	Basic: No	sort: 0.00

Pay item groups

Group ID	Description	Default
Safw1Z_Add.Pay Items Gr...	Sep 4, 25 Session Pay Items Groups	✓

Actions

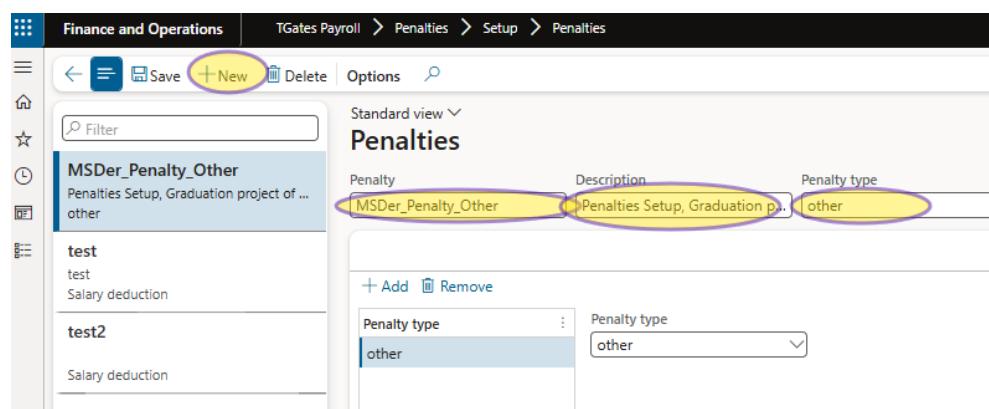
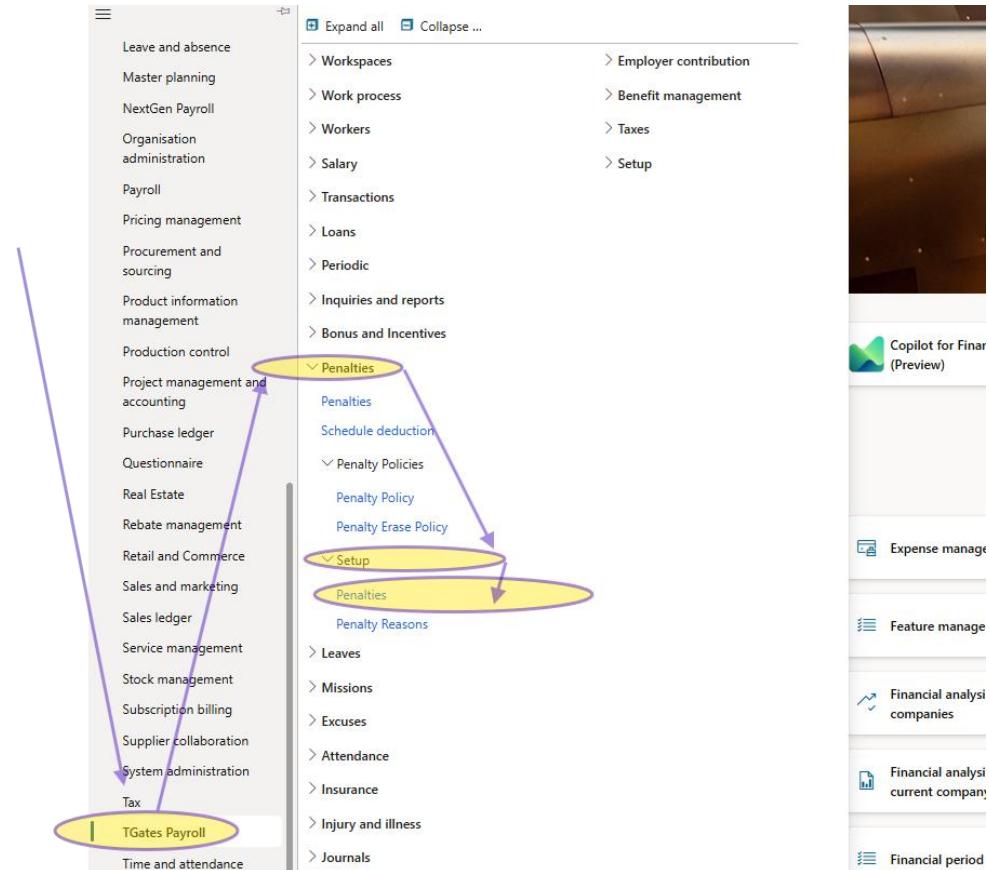
Action ID: Safw1Z_Over Time	Description: Action, Attendance Policy, 20...	Action type: Hourly
Salary action details		
Item ID: Safw1Z_PItem_Over Time	Calculation ID: Safw1Z_PItemCalc_Over Time	Quantity: 1.00
Fixed quantity: 0.00	Max hours:	Unit: Hour
Reverse Pay Item ID: Reverse item calculation ID:		

Attendance Policy

Policy ID: Safw1Z_Attendance Policy	Description: Attendance Policy, 20251023 ...		
General			
VALID FOR WORKERS	PAY PERIODS	EFFECTIVE DATE	
Valid for workers: All	Valid for: Table	Effective: 03/11/2025	
Worker group:	Pay code: Safw1Z_Pay Period	Expiration: Never	
Policy Lines			
Weekday:	<input checked="" type="radio"/> Any day <input type="radio"/> Sunday <input type="radio"/> Monday <input type="radio"/> Tuesday <input type="radio"/> Wednesday <input type="radio"/> Thursday <input type="radio"/> Friday <input type="radio"/> Saturday		
Any day:			
Rules			
Rule Type	Action ID	Rule Type	Turn over type
Absence	Safw1Z_Action_Warning_إذن	Over time	Period
Absence	Safw1Z_1/4 day_Deduction	Action ID: Safw1Z_Over Time	To: 23:00
Absence	Safw1Z_1/2 day_Deduction	Counter Type: Hours	From Minutes: 0
Absence	Safw1Z_Full day_Deduction	From: 1.00	Week end: No
Leave Early	Safw1Z_Early Leave	To: 999.999.999...	
Over time	Safw1Z_Over Time	From time: 16:00	
# of rows	7 rows		

Penalties

TGates Payroll > Penalties > Setup > Penalties



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Finance and Operations | TGates Payroll > Penalties > Setup > Penalties

New **Save** **Delete** **Options** **Filter**

Standard view **Penalties**

Penalty	Description	Penalty type
MSDer_Penalty_Salary Deduc...	Penalties Setup, Graduation project of ... Salary deduction	Salary deduction
MSDer_Penalty_Other	Penalties Setup, Graduation project of ... other	
test	test Salary deduction	
test2	Salary deduction	

General

Item ID	Calculation ID	Penalty Days/Hours
*	Form information	*
	Personalise: Item ID	
	View shortcuts	
	View details	
+ Add	Remove	
Penalty type	Penalty type	
other	other	

Finance and Operations | TGates Payroll > Penalties > Setup > Penalties

Save **New** **Delete** **Calculation** **Options** **Filter**

New Record **Standard view**

Pay items

Item ID	Description	Search name	Group ID	Suspended
MSDer_Salary Deduction_Pl...	Salary Deduction, Pay item, P...	MSDer_Salary Deduction_Pl...	MSDers_Deduction	No

General

CALCULATION	TAX	MISCELLANEOUS	
Calc Method Variable	Calculate taxes <input checked="" type="radio"/> No	Currency EGP	Hidden <input checked="" type="radio"/> No
Calc type Deduction	Do not exceed max exempted a... <input checked="" type="radio"/> No	Basic <input checked="" type="radio"/> No	sort 0.00
Calculate insurance <input checked="" type="radio"/> No			

External code
Employer cor

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Finance and Operations | TGates Payroll > Penalties > Setup > Penalties

MSDer_PitemC_Salary DEduc...

Pay Item Calculation

General

Calculation ID	Description	Item ID
MSDer_PitemC_Salary DEduc...	Pay Item Calculation, Salary ...	MSDer_Salary Deduction_P.I...

CALCULATION

Calc. Output	Hour factor	LIMIT
Hourly	1.00	Max. Amount 0.00
Update amount from source		Min. Amount 0.00
<input type="radio"/> No		

Calculation Details

+ Add line	Remove	Line num.	Valid for	Item ID	Group ID	Percent	Operator	Original amount
		1.00	Table	MSDers_Basic_Salary		100.00		<input checked="" type="checkbox"/>

Finance and Operations | TGates Payroll > Penalties > Setup > Penalties

msd

Pay items

General

CALCULATION	TAX	MISCELLANEOUS
Calc. Method Variable	Calculate taxes <input type="radio"/> No	Currency EGP
Calc. type Deduction	Do not exceed max exempted a... <input type="radio"/> No	Basic
Calculate insurance		

Finance and Operations | TGates Payroll > Penalties > Setup > Penalties

Standard view >

Penalties

Penalty	Description	Penalty type
MSDer_Penalty_Salary Deduc...	Penalties Setup, Graduation project of ...	Salary deduction

General

Item ID	Calculation ID	Penalty Days/Hours	Unit	Pay code	Reverse Pay item ID	Reverse item calculation ID
MSDer_Salary Deduction_P.I...	MSDer_PitemC_Salary DEduc...	1.00	Day	MSDers_Basic_Salary		

Actions

- Form Information
- Personalise Reverse Pay Item ID
- View shortcuts
- View details**

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

Project: Payroll Integration Simulation

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Pay items

Item ID	Description	Search name	Group ID	Suspended
MSDer_Penalty_Reverse_P.item	Penalties Setup, Penalty Reverse Pay It...	MSDer_Reverse_P.item	MSDers_Addition	No

General

CALCULATION

- Calc. Method: Variable
- Calc. type: Addition

TAX

- Calculate taxes: No

MISCELLANEOUS

- Currency: EGP
- Basic: No

Hidden

- Hidden: No

Filter title: All

Sort: 0.00

Pay Item Calculation

Calculation ID	Description	Item ID
MSDer_Penalty_Rev_P.itemClac	Pay Item Calculation	MSDer_Penalty_Rev_P.item

General

CALCULATION

- Calc. Output: Amount

LIMIT

- Max. Amount: 0.00
- Min. Amount: 0.00

Pay items

Item ID	Description
MSDer_Penalty_Reverse_P.item	Penalties Setup, Penalty Reverse R...

General

CALCULATION

- Calc. Method: Calculate taxes

Penalties

Penalty	Description	Penalty type
MSDer_Penalty_Salary Deduction	Penalties Setup, Graduation project of ...	Salary deduction
MSDer_Penalty_Other	Penalties Setup, Graduation project of ...	

General

Calculation ID: MSDer_PitemC_Salary Ded...

Penalty Days/Hours: 1.00

Unit: Day

Pay code: MSDers_Basic Salary

Reverse Pay Item ID: MSDer_Penalty_Rev_P.item

Reverse Item calculation ID: MSDer_Penalty_Rev_P.item...

CAI3_ERP8_G3 MSD HCM Application Consultant/Management &ERP

Project: Payroll Integration Simulation

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Finance and Operations

- Leave and absence
- Master planning
- NextGen Payroll
- Organisation administration
- TGates Payroll**
- Payroll
- Pricing management
- Procurement and sourcing
- Product information management
- Production control
- Project management and accounting
- Purchase ledger
- Questionnaire
- Real Estate
- Rebate management
- Retail and Commerce
- Sales and marketing
- Sales ledger
- Service management
- Stock management
- Subscription billing
- Supplier collaboration
- System administration
- Tax
- Time and attendance

- > Workspaces
- > Work process
- > Workers
- > Salary
- > Transactions
- > Loans
- > Periodic
- > Inquiries and reports
- > Bonus and Incentives
- > **Penalties**
 - Penalties
 - Schedule deduction
 - > Penalty Policies
- > **Setup**
 - Penalties
 - Penalty Reasons**
- > Leaves
- > Missions
- > Excuses
- > Attendance
- > Insurance
- > Injury and illness
- > Journals
- > Performance management
- > Periods

Finance and Operations | TGates Payroll > Penalties > Setup > Penalty Reasons

Standard view

Penalty Reason	Description	Turn-over Start	Month
MSDers Inattention at work	Inattention at work, Penalty Reason, Graduation project of MSDers Walaa - Ahmad - Ahmad - Eslam - Safwan	Employment date	

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



The screenshot shows the Microsoft Dynamics 365 Finance and Operations interface. The left sidebar lists various modules: 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, Questionnaire, Real Estate, Rebate management, Retail and Commerce, Sales and marketing, Sales ledger, Service management, Stock management, Subscription billing, Supplier collaboration, System administration, Tax, and TGates Payroll. The 'Penalties' node under Payroll is highlighted with a yellow oval. A purple arrow points from the 'Penalties' node down to the 'Penalty Policies' node, which is also highlighted with a yellow oval. Another purple arrow points from 'Penalty Policies' down to the 'Penalty Policy' node, which is also highlighted with a yellow oval. The main content area shows a standard view of the 'Penalty Policy' screen.

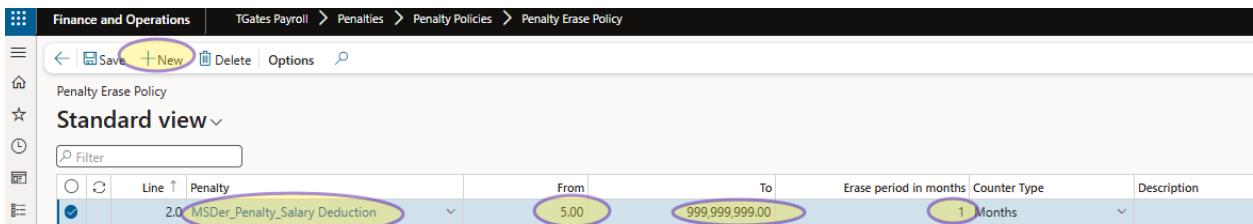
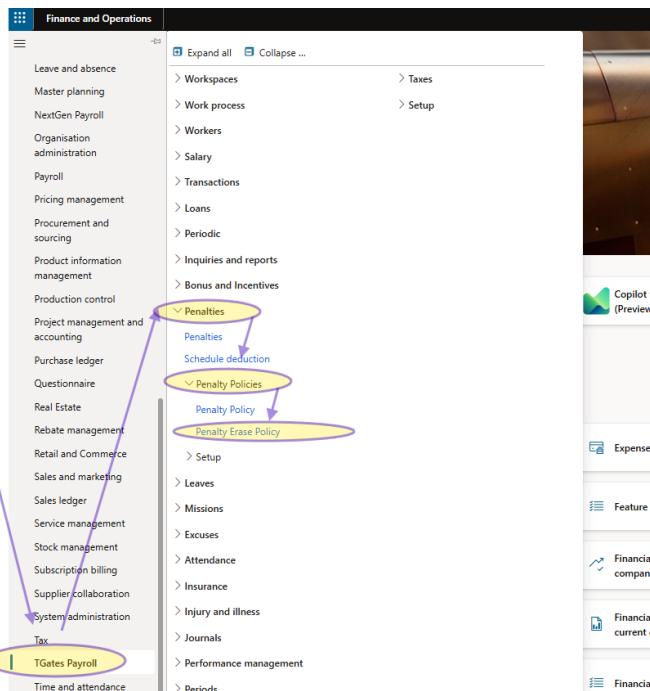
The screenshot shows the 'Penalty Policy' screen in Microsoft Dynamics 365. The top bar includes 'Save', '+ New', 'Delete', and 'Options'. The 'Policy ID' field contains 'MSDers_Penalty Policy'. The 'Description' field contains 'Penalty Policy, MSDers project'. The 'General' section has 'Valid for workers' set to 'All' and 'Pay code' set to 'MSDers_Basic Salary'. The 'Policy Lines' section shows a single line for 'MSDers Inattention at work' with a penalty of '3.00' and a life time of '999,999,999.00'. A purple arrow points from the '+ New' button to the 'New' button on the toolbar.

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

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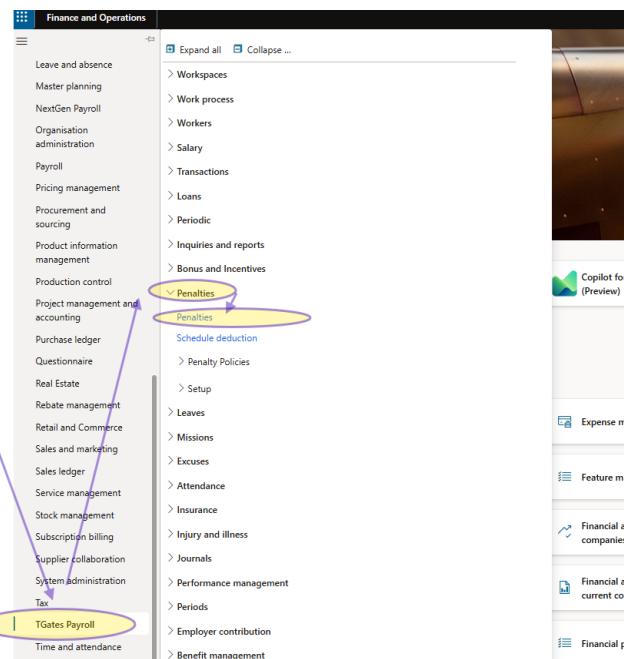


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The screenshot shows the 'Penalties' list page. The table has columns: Action number, Investigation number, Person, Reason, Penalty, Penalty Date, Unit, Absence Date, Action approved on, End date, Case date, End status, and Action approval status. Two rows are visible:

Action number	Investigation number	Person	Reason	Penalty	Penalty Date	Unit	Absence Date	Action approved on	End date	Case date	End status	Action approval status
000001	1045 -2025	Jodi Christiansen		test2	0.00 Day	0.00 Day	0.00	13/08/2025	01/10/2025		Pending	Created
000001	2025	Jodi Christiansen			0.00 Day	1.00 Day	0.00	30/10/2025			Pending	Created

CAI3_ERP8_G3 MSD HCM Application Consultant/Management &ERP

Project: Payroll Integration Simulation

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Finance and Operations

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
Questionnaire
Real Estate
Rebate management
Retail and Commerce
Sales and marketing
Sales ledger
Service management
Stock management
Subscription billing
Supplier collaboration
System administration
Tax
TGates Payroll
Time and attendance

Workspaces
Work process
All cases
Requests
Proposal statements
Minutes of meeting cases
All requests
Financial Disclosure
Proposals
Actions
All actions
Other actions
Penalty actions
Penalty erase actions
Special leaves actions
Period adjustment actions
Termination actions
Recruitment actions
Transition actions
Assignment actions
Promotion actions
Increment actions
Leave balance transfer actions
Workers
Salary
Transactions
Loans

Bonus and Incentives
Penalties
Leaves
Missions
Excuses
Attendance
Insurance
Injury and illness
Journals
Performance management
Periods
Employer contribution
Benefit management
Taxes
Setup

Copilot for Finance (Preview)

Expense management

Feature management

Financial analysis - all companies

Financial analysis - current company

Financial period close

CAI3_ERP8_G3 MSD HCM Application Consultant/Management &ERP

Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Finance and Operations | TGates Payroll > Work process > Actions > Penalty actions

[Save](#) [New](#) [Delete](#) [Approval](#) [Update](#) [Options](#)

Penalty actions

Standard view

Serial	Action number	Year	Description	Action sub-type	Action type	Action date	Action approval sta...
USMF-000000073	MSDer_Penal_Act	2025	Inattention at work, MSDers Project	*	Form information	04/11/2025	Created
USMF-000000070	2025	2025	جزاء بالعمل	جزاء	Personalise: Action sub-type	01/10/2025	Approve
USMF-000000061	1045 -2025	2025		جزاء	Export all rows	13/08/2025	Created

General Action details Notes

Action sub-type: [View details](#)

Finance and Operations | TGates Payroll > Work process > Actions > Penalty actions

[Save](#) [New](#) [Delete](#) [Options](#)

Action sub-types

Standard view

Action type	Action sub-type	Name	Position lookup restrict to job	Position lo...	Action ID
Penalty	MSDers_ActionSubType	MSders_ActionSubType	<input type="checkbox"/>	<input type="checkbox"/>	
Increment	Annual increase	Test	<input type="checkbox"/>	<input type="checkbox"/>	

Action sub-type: [View details](#)

Finance and Operations | TGates Payroll > Work process > Actions > Penalty actions

[Save](#) [New](#) [Delete](#) [Approval](#) [Update](#) [Options](#)

Penalty actions

Standard view

Serial	Action number	Year	Description	Action sub-type	Action type	Action date	Action approval sta...	Effective date
USMF-000000073	MSDer_Penal_Act	2025	Inattention at work, MSDers Project	MSDers_ActionSubType	Penalty	04/11/2025	Created	04/11/2025
USMF-000000070	2025	2025	جزاء بالعمل	جزاء	Penalty	01/10/2025	Approved	01/10/2025
USMF-000000061	1045 -2025	2025		جزاء	Penalty	13/08/2025	Created	13/08/2025

Action sub-type: [View details](#)

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

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Finance and Operations | TGates Payroll > Work process > Actions > Penalty actions

Standard view

General **Action details** **Notes**

GENERAL		APPROVAL	ADDITIONAL INFO	PENALTY INFORMATION
Serial	USMF-000000073	Action approval status	Action taken by	Investigation number
Action number	MSDer_Pen...	Workflow Status	Case ID	Effective date
Year	2025	Action approved on	Request ID	Penalty Reason
Description	Inattention at work, MSDers ...			Penalty
Action sub-type	MSDers_ActionSubType			
Action type	Penalty			
Action date	04/11/2025			

Lines

+ Add line **Remove** **Penalty reason counter** **Variable Entries** **Schedule deduction**

Finance and Operations | TGates Payroll > Work process > Actions > Penalty actions

Standard view

General **Action details** **Notes**

Serial	Action number	Year	Description	Action sub-type	Action type	Action date	Action approval sta...	Effective date	Action
USMF-000000073	MSDer_Penal_Act	2025	Inattention at work, MSDers Project	MSDers_ActionSubType	Penalty	04/11/2025	Approved	04/11/2025	

Lines

+ Add line **Remove** **Penalty reason counter** **Variable Entries** **Schedule deduction**

Bug

Personnel number	Worker	Penalty Reason	Penalty	Penalty Days/Hours	Unit	Absence D...	Erase date	Erase status
555551	MSDers Employee Worker 1	MSDer_Penalty_Salary Deduction	1.00	Day	0.00			Pending

Finance and Operations | TGates Payroll > Work process > Actions > Penalty actions

MSDer_Penal_Act : MSDer_Penalty_Salary Deduction | Standard view

Variable Entries

Penalties

Entry batch number	Worker	Description	Date	Pay code	Period code	Item ID	Calculation ID	Days	Hours	Amount in...	Payroll cal...	Approval Status
USMF-0000000142	MSDers Employee Worker 1	Inattention at work, MSDers Project	04/11/2025	MSDers_Basic Salary	11	MSDer_Salary Deduction_...	MSDer_P_item_C_Salary DE...	1	8.000000	0.00		Approved

CAI3_ERP8_G3 MSD HCM Application Consultant/Management &ERP
Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Finance and Operations | TGates Payroll > Work process > Actions > Penalty actions

All actions Standard view

General Action details Notes

Serial	Action number	Year	Description	Action sub-type	Action type	Action date
USMF-00000073	MSDer_Penal_Act	2025	Inattention at work, MSDers Project	MSDers_ActionSubType	Penalty	04/11/2025

Finance and Operations | Human resources > Workers > Employees

Employees (Active) | Standard view

MSDers Employee Worker 1 55551
 ME
 MSDers Title 1 • MSDers Department 1 • Employee
 Contoso Entertainment System USA

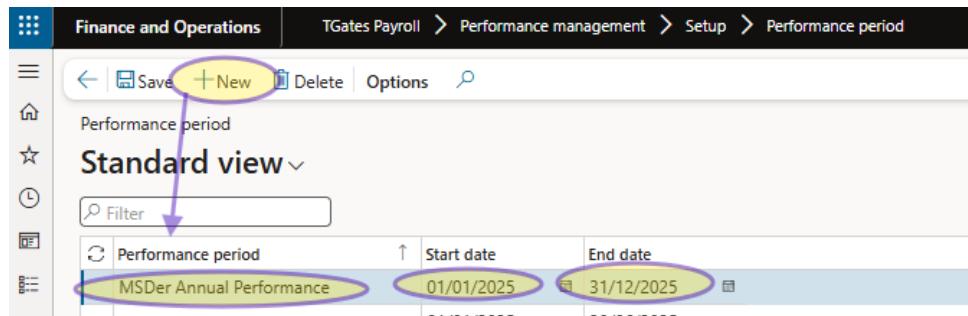
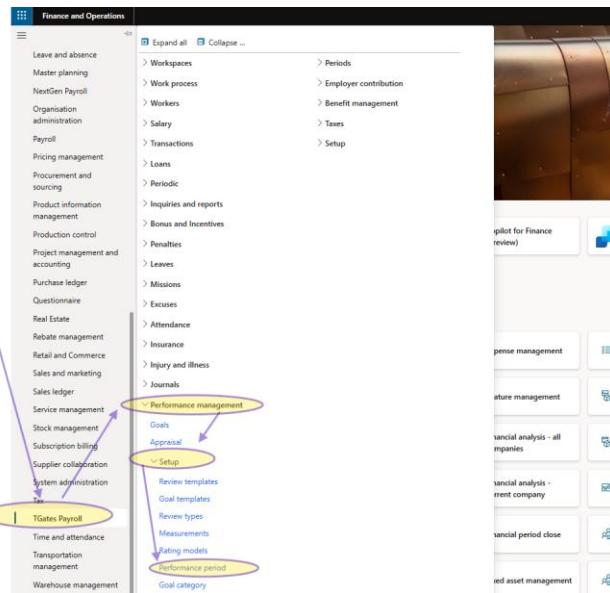
MSDers, Walaa - Ahmad - Ahmad - Eslam - Safwan Position 1 | MSDers Job Level 1 | Employed
 Job | Job level | Employee Status

Location

Profile Work history Positions Commerce Time registration Links Periods Penalties Appraisal Payroll April

Action number	Penalty Reason	Penalty	Penalty Date	Unit	Absence Duration	Investigation number	Action approved on	Action date	Erase date	Erase Status	Action approval status
MSDer_Penal_Act	MSDer_Penalty_Salary De...	1.00	Day	0.00			04/11/2025	04/11/2025		Pending	Approved

Performance Management, Appraisal



CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



The screenshot shows the Microsoft Dynamics 365 Finance and Operations interface. The left sidebar lists various modules: 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, Questionnaire, Real Estate, Rebate management, Retail and Commerce, Sales and marketing, Sales ledger, Service management, Stock management, Subscription billing, Supplier collaboration, System administration, Tax, Time and attendance, Transportation management, and Warehouse management. A yellow oval highlights the "TGates Payroll" module. The main content area is titled "Performance management" and includes sub-options: Goals, Appraisal, Setup, Review templates, Goal templates, Review types, Measurements, Rating models, Performance period, and Goal category. Arrows point from the highlighted "TGates Payroll" to the "Performance management" section, and from the "Performance management" section to the "Rating models" sub-option.

The screenshot shows the "Rating models" setup screen. The top bar includes "Save", "+ New", "Delete", and "Options". The main area is titled "Rating models" and shows a table with columns: Rating, Description, and Default for gov performance (checkbox). One row is selected, showing "MSDer_Rati..." and "Rating mode, Performance M...". Below this is a "Levels" section with a table:

Level	Description	Factor ↑	Percent from	Percent to
5	Bad	4	1.00	64.00
4	Fair	3	65.00	72.00
3	Good	2	73.00	79.00
2	Very Good	1	80.00	89.00
1	Excellent	0	90.00	100.00

The screenshot shows the "Review templates" setup screen. The top bar includes "Save", "+ New", "Delete", and "Options". The main area is titled "Rating models" and shows a table with columns: Rating, Description, and Default for gov performance (checkbox). One row is selected, showing "MSDer_Rati..." and "Rating mode, Performance M...". The "Default for gov performance" checkbox is checked. Below this is a "Levels" section with a table:

Level	Description	Factor ↑	Percent from	Percent to
-------	-------------	----------	--------------	------------

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Finance and Operations

- 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
- Questionnaire
- Real Estate
- Rebate management
- Retail and Commerce
- Sales and marketing
- Sales ledger
- Service management
- Stock management
- Subscription billing
- Supplier collaboration
- System administration
- Tax
- TGates Payroll**
- Time and attendance
- Transportation management
- Warehouse management

Performance management

- Goals
- Appraisal
- Setup**
- Review templates
- Goal templates
- Review types
- Measurements**
- Rating models
- Performance period
- Goal category

Finance and Operations | TGates Payroll > Performance management > Setup > Measurements

New

MSDer Measurement 1 Perform...

MSDer Measurement 2 Perform...

MSDer Measurement 3 Perform...

MSDer Measurement 4 Perform...

MSDer Measurement 5 Perform...

Measurements

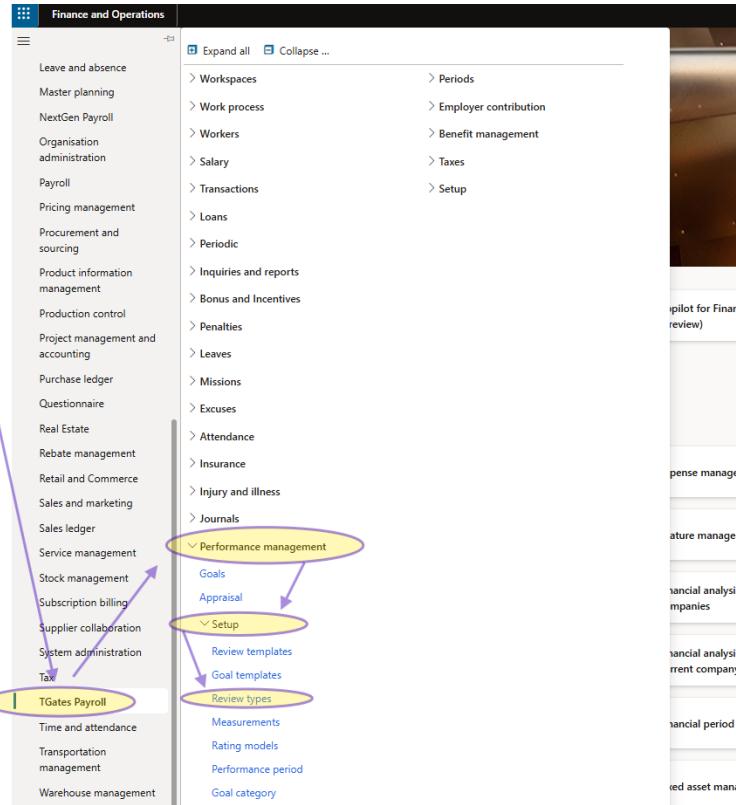
Measurement	Measurement type
MSDer Measurement 1 Perform...	Percentage

CAI3_ERP8_G3 MSD HCM Application Consultant/Management &ERP

Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

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The screenshot shows the 'Review types' list page in Microsoft Dynamics 365. A new review type has been created and is displayed in the list:

Review type	Description	Enable workflow for this type	Status of new review	Allow edit in final review	Enable manager sign off	Enable employee sign off
MSDerA.Appraisal	Review types, MSDers project	<input type="checkbox"/>	Not started	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

CAI3_ERP8_G3 MSD HCM Application Consultant/Management &ERP

Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

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The screenshot shows the Microsoft Dynamics 365 Finance and Operations interface. The left sidebar lists various modules: Leave and absence, Master planning, NextGen Payroll, Organization administration, Payroll, Pricing management, Procurement and sourcing, Product information management, Production control, Project management and accounting, Purchase ledger, Questionnaire, Real Estate, Rebate management, Retail and Commerce, Sales and marketing, Sales ledger, Service management, Stock management, Subscription billing, Supplier collaboration, System administration, Tax, and TGates Payroll. The 'Performance management' section is highlighted with a yellow oval. The main content area shows a detailed view of the 'Performance management' setup, with sections like 'Goals', 'Appraisal', 'Setup', and 'Review templates'. Arrows point from the 'TGates Payroll' icon in the sidebar to the 'Performance management' section, and from the 'Review templates' section in the main content area back to the 'TGates Payroll' icon.

The screenshot shows the 'Review templates' page in Microsoft Dynamics 365. The top navigation bar includes 'Save', '+ New', 'Delete', 'Show sections', and 'Options'. The main area displays a 'Standard view' of 'Review templates'. A new template is being created, with the name 'MSDer_Review template' highlighted in a yellow oval. Other fields shown include 'Is active' (set to 'Yes'), 'Job family', and 'Position type'. Below this, there are tabs for 'General', 'Measurements', 'Activities', 'Sign Offs', 'Ratings', and 'Attachments'. The 'General' tab is selected, showing 'Review type' set to 'MSDer_Appraisal', 'Rating' set to 'MSDer_Rating', and a 'Description' field containing 'Review types, MSDers projects'. Arrows point from the '+ New' button in the top bar to the 'MSDer_Review template' name, and from the 'MSDer_Review template' name back to the '+ New' button.

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

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Review templates

Review template: **MSDer_Review template** Is active: Yes Job family: Position type:

Review: Measurements (4) Activities (0) Sign Offs Ratings Attachments General

Measurements

+ Add measurement Edit measurement Remove

Measurement	Target	Currency	Stretch goal	Weight
MSDer Measurement 1 Performance	20		20	20
Target percent	20		20	20
20.00	20		20	20

Stretch goal: No Weight: 20 OK

Review templates

Review template: **MSDer_Review template** Is active: Yes Job family: Position type:

Review: Measurements (5) Activities (0) Sign Offs Ratings Attachments General

Measurements

+ Add measurement Edit measurement Remove

Measurement	Target	Currency	Stretch goal	Weight
MSDer Measurement 5 Performance	20		20	20
MSDer Measurement 4 Performance	20		20	20
MSDer Measurement 3 Performance	20		20	20
MSDer Measurement 2 Performance	20		20	20
MSDer Measurement 1 Performance	20		20	20

CAI3_ERP8_G3 MSD HCM Application Consultant/Management &ERP

Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

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Finance and Operations

- 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
- Questionnaire
- Real Estate
- Rebate management
- Retail and Commerce
- Sales and marketing
- Sales ledger
- Service management
- Stock management
- Subscription billing
- Supplier collaboration
- System administration
- Tax
- TGates Payroll**
- Time and attendance
- Transportation management
- Warehouse management

Expand all Collapse ...

- > Workspaces
- > Work process
- > Workers
- > Salary
- > Transactions
- > Loans
- > Periodic
- > Inquiries and reports
- > Bonus and Incentives
- > Penalties
- > Leaves
- > Missions
- > Excuses
- > Attendance
- > Insurance
- > Injury and illness
- > Journals
- > Performance management
- Goals
- Appraisal**
- > Setup
- Review templates
- Goal templates
- Review types
- Measurements
- Rating models
- Performance period
- Goal category

Periods

Employer contribution

Benefit management

Taxes

Setup

iplot for Finance review)

Demand

Optimis

ture management

Outbou

Financial analysis - all companies

Outbou

Financial analysis - current company

Paymer

Financial period close

Payroll

Red asset management

Payroll

Finance and Operations > **TGates Payroll** > **Performance management** > **Appraisal**

New review

Standar

MSDerA.Appraisal

Review type

MSDer Annual Performance

Start date: 01/01/2025

End date: 31/12/2025

Worker: **MSDers Employee Worker 1**

OK

Worker	Review type	Status
Ahmed Osama Ali	AO Performance	Not star
Maiar Adel	Appraisal MK	Not star
Bardeen Hany	AH PERF	Not star
عمرو ديار	CAI3 Q Reviews	Not star
Omar Fouad	Tele Sales Omar	Completed
Ahmed el-Sheikh	WE review	Not star
abdelmaksoud mohamed...	تقييم شهری حافظ	In progress
Mohamed Fawzy nomir	تقييم شهری حافظ	Not star
احمد محمد الخطاب	Appraisal	In progress
محمود أحمد اسماعيل	Appraisal	In progress

التقيم الشهري

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

Project: Payroll Integration Simulation

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Finance and Operations | TGates Payroll > Performance management > Appraisal

New from template

Review template: MSDer_Review template

Description: Review types, MSDers project

Job family: MSDerA.Appraisal

Position type: MSDerA.Appraisal

SELECT WORKERS

Show all workers

Name: MSDers Employee Worker 1

Personnel number: 0000055551

MSDers Employee Worker 1

MSDers Employee Worker 2

MSDers Employee Worker 3

MSDers Employee Worker 4

MSDers Employee Worker 5

Performance period

MSDer Annual Performance

Start date: 01/01/2025

End date: 31/12/2025

OK

Start date: 01/01/2025

Performance period: MSDer Annual Performance

Finance and Operations | TGates Payroll > Performance management > Appraisal

Appraisal

Standard view *

Filter

003356

Review types, MSDers project

MSDers Employee Worker 1

MSDerA.Appraisal

Not started

Start date: 01/01/2025

Performance period: MSDer Annual Performance

Total goals: 0.00

Finance and Operations | TGates Payroll > Performance management > Appraisal

Appraisal | Standard view *

Review types, MSDers project

MSDers Employee Worker 1

MSDerA.Appraisal

MSDer Annual Performance

Not started

Save

+ New review

Delete

New from template

Mass creation

Show sections

Print review

Options

Measurements (5)

Activities (0)

Ratings

Sign offs (1)

Attachments

General

Add measurement

Edit measurement

Remove

Measurement	Target	Currency	Actual	Stretch goal
MSDer Measurement 5 P	10		18.5	
MSDer Measurement 4 P	10		19	
MSDer Measurement 3 P	10		19.5	
MSDer Measurement 2 P	10		19	
MSDer Measurement 1 P	10		0	

Actual percent: 19.50

Stretch goal: No

Weight: 20

OK

CAI3_ERP8_G3 MSD HCM Application Consultant/Management &ERP

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Review types, MSDers project

Ratings

Final employee rating: Excellent (95.50)

Total goals score: 0.00

Average score: 0.00

Sign offs (1)

Worker	Required	Sign off date
MSDers Employee Worker 1	<input checked="" type="checkbox"/>	05/11/2025 04:29:02

General

Review type: MSDerAAppraisal

Performance period: MSDer Annual Performance

Status: Not started

Description: Review types, MSDers project

Start date: 01/01/2025

Rating: Rating mode, Performance ...

Worker: MSDers Employee Worker 1

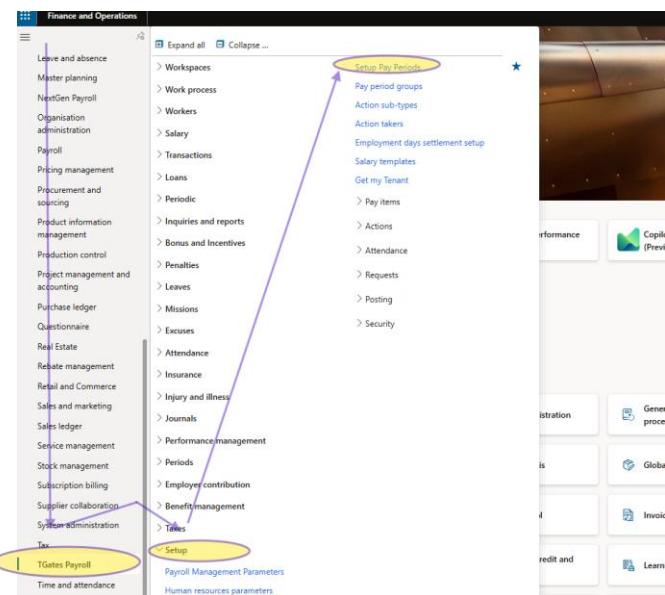
End date: 31/12/2025

Standard view *

Discussion	Description	Worker	Review type	Status	Start date	Performance period	Total goals...	Final employee rating
003356	Review types, MSDers project	MSDers Employee Worker 1	MSDerAAppraisal	Not started	01/01/2025	MSDer Annual Performance	95.50	Excellent

Bonus

TGates payroll > Bonus and incentives > Bonus transactions



Pay code	Description	Pay period type
MISDers_Bonus_P_Period	MISDers_Bonus_P_Period	Bonus, Pay Period, Graduation, Non-periodic

The main configuration area includes sections for 'CALCULATE', 'TAX CALCULATION', 'POSTING', 'MISCELLANEOUS', and 'DUAL CURRENCY'. Various checkboxes and dropdowns are visible throughout the form.

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

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Finance and Operations

TGates Payroll > Setup > Setup Pay Periods

- 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
- Questionnaire
- Real Estate
- Rebate management
- Retail and Commerce
- Sales and marketing
- Sales ledger
- Service management
- Stock management
- Subscription billing
- Supplier collaboration
- System administration
- Tax
- TGates Payroll**
- Time and attendance

Setup Pay Periods

- Workspaces
- Work process
- Workers
- Salary
- Transactions
- Loans
- Periodic
- Inquiries and reports
- Bonus and Incentives
- Penalties
- Leaves
- Missions
- Excuses
- Attendance
- Insurance
- Injury and illness
- Journals
- Performance management
- Periods
- Employer contribution
- Benefit management
- Taxes

Pay period groups

Action sub-types

Action takers

Employment days settlement setup

Salary templates

Get my Tenant

Pay Items

Pay item groups

Pay Items List

Actions

Attendance

Requests

Posting

Security

Pay Items

Pay item groups

Pay Items List

Actions

Attendance

Requests

Posting

Security

Finance and Operations

TGates Payroll > Setup > Pay Items > Pay items

Standard view > Pay items

Item ID	Description	Search name	Group ID	Suspended
MSDer_Bonus_P.Item	Bonus, Pay item, Graduation project of...	MSDer_Bonus_P.Item	MSDers_Addition	No

General

CALCULATION

- Calc. Method: Constant
- Calc. type: **Addition**

TAX

- Calculate taxes: No
- Basic: No
- Hidden: No

MISCELLANEOUS

- Calculate insurance: No
- Currency: EGP
- Sort: 0.00
- Filter title: All

OVERRIDE SETTINGS

- Override source type: No
- External code:

Pay item groups

+ Add line	Remove	
Group ID	Description	Default
MSDers_Addition	Pay item groups - Addition - Graduation project of MSDers	✓

Accounting

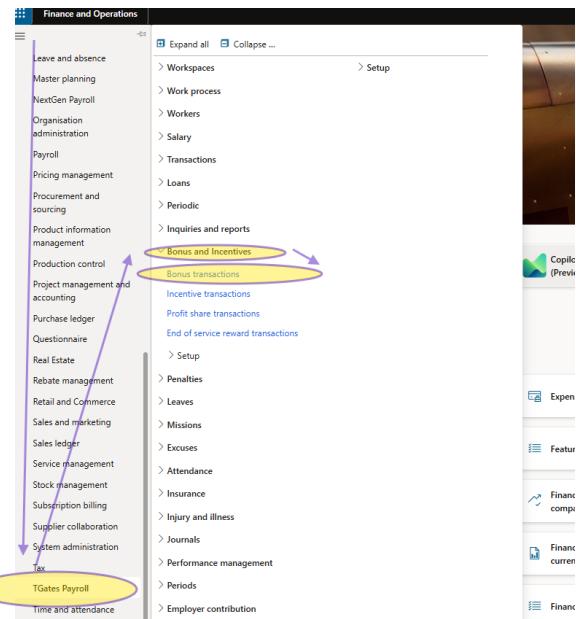
+ Add line	Remove			
Account type	Account	Valid for	Worker	Department
Ledger	110105-	All		

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

Project: Payroll Integration Simulation

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Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Finance and Operations | TGates Payroll > Bonus and incentives > Bonus transactions

[Edit](#) [New](#) [Delete](#) [Options](#)

Bonus transactions | Standard view ▾

USMF-000000052 : MSDer_Bonus

Lines

General		Pay code		Period code		Item ID		Default amount															
Bonus ID	Description	Committee Id	Date	Pay code	Period code	Item ID	Default amount	Payroll calculated															
USMF-000000052	MSDer_Bonus		04/11/2025	MSDer_Bonus_P_Per...	1	MSDer_Bonus_P_Item...	1,000.00	No															
Lines																							
+ Add line Remove Create lines from accruals <table border="1"> <thead> <tr> <th>Personnel number</th> <th>Worker</th> <th>Quantity</th> <th>Amount</th> <th>Gross amo...</th> <th>Tax percent</th> <th>Tax amount</th> </tr> </thead> <tbody> <tr> <td>555551</td> <td>MSDers Employee Worker 1</td> <td>2.00</td> <td>1,000.00</td> <td>2,000.00</td> <td>30.00</td> <td>600.00</td> </tr> </tbody> </table>										Personnel number	Worker	Quantity	Amount	Gross amo...	Tax percent	Tax amount	555551	MSDers Employee Worker 1	2.00	1,000.00	2,000.00	30.00	600.00
Personnel number	Worker	Quantity	Amount	Gross amo...	Tax percent	Tax amount																	
555551	MSDers Employee Worker 1	2.00	1,000.00	2,000.00	30.00	600.00																	

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

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The screenshot shows the Microsoft Dynamics 365 Finance and Operations navigation bar. Under the Payroll category, 'TGates Payroll' is highlighted with a yellow oval. A purple arrow points from this oval to a yellow oval around the 'Periodic' link in the main menu. Another purple arrow points from the 'Periodic' link to a yellow oval around the 'Calculate pay statements' option in the dropdown menu.

- Leave and absence
- Master planning
- NextGen Payroll
- Organization administration
- TGates Payroll**
- Procurement and sourcing
- Product information management
- Production control
- Project management and accounting
- Purchase ledger
- Questionnaire
- Real Estate
- Retail and Commerce
- Sales and marketing
- Sales ledger
- Service management
- Stock management
- Subscription billing
- Supplier collaboration
- System administration
- Tax

Periodic

- > Workspaces
- > Work process
- > Workers
- > Salary
- > Transactions
- > Loans
- > Periodic
- > Workspaces
- > Work process
- > Workers
- > Salary
- > Transactions
- > Loans
- > Periodic
- > Record training costs
- > Refresh leave days for selected date
- > Update pay statement taxable amount
- > Update paystatement totals
- > Update pay statement insured amount
- > Adjust leave balances
- > Spotlight wall setup
- > Inquiries and reports
- > Bonus and Incentives
- > Penalties
- > Leaves
- > Missions
- > Excuse
- > Attendance
- > Insurance
- > Injury and illness
- > Journals

The screenshot shows the 'Period codes' screen under the 'TGates Payroll > Periodic' path. A yellow oval highlights the 'MSD' row in the list. A purple arrow points from this row to a yellow oval around the 'Pay code: "MSD"' link in the details pane. The details pane displays the following information:

Period code	Description
1	Pay code: "MSD"
2	Description: "MSD"
3	From date: "MSD"
4	To date: "MSD"
5	Payroll calculated: "MSD"
6	Status: "MSD"
00001	00001
00001	00001
.....

The screenshot shows the 'Period codes' screen under the 'TGates Payroll > Periodic' path. A yellow oval highlights the 'MSDer_Bonus_P Period' row. A purple arrow points from this row to a yellow oval around the 'Calculate' button in the 'Actions' section. The 'Actions' section includes buttons for 'Calculate', 'Approve', 'Cancel approval', 'Create due journal', and 'Publish Ess'. The 'Links' section includes links for 'Pay statements lines', 'Worker pay statements', 'Due Journals', and 'Employer contribution'. The 'Print' section includes links for 'Pay statement' and 'Item totals'.

Pay code	Period code	Description	Month	From date	To date	Payroll calculated	Status
MSDer_Bonus_P Period	1		January	11/01/2025	11/01/2025		None
MSDers_Basic Salary	1		January	01/01/2025	31/01/2025		None
MSDers_Basic Salary	2		February	01/02/2025	28/02/2025		None

CAI3_ERP8_G3 MSD HCM Application Consultant/Management & ERP

Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Finance and Operations | T Gates Payroll > Periodic > Period codes

Standard view * ▾

Pay code

Pay code	Period code	Description	Month	From date	To date	Payroll calculated	Status
MSDers_Basic_Salary	1		January	01/01/2025	31/01/2025	None	None
MSDers_Bonus_P_Period	2		February	01/02/2025	28/02/2025	None	None
MSDers_Basic_Salary	3		March	01/03/2025	31/03/2025	None	None
MSDers_Basic_Salary	4		April	01/04/2025	30/04/2025	None	None
MSDers_Basic_Salary	5		May	01/05/2025	31/05/2025	None	None
MSDers_Basic_Salary	6		June	01/06/2025	30/06/2025	None	None
MSDers_Basic_Salary	7		July	01/07/2025	31/07/2025	None	None
MSDers_Basic_Salary	8		August	01/08/2025	31/08/2025	None	None
MSDers_Basic_Salary	9		September	01/09/2025	30/09/2025	Calculated	None
MSDers_Basic_Salary	10		October	01/10/2025	31/10/2025	None	None
MSDers_Basic_Salary	11		November	01/11/2025	30/11/2025	None	None
MSDers_Basic_Salary	12		December	01/12/2025	31/12/2025	None	None
MSDers_Basic_Salary	13						
MSDers_Basic_Salary	14						
MSDers_Basic_Salary	15						
MSDers_Basic_Salary	16						
MSDers_Basic_Salary	17						
MSDers_Basic_Salary	18						
MSDers_Basic_Salary	19						
MSDers_Basic_Salary	20						
MSDers_Basic_Salary	21						
MSDers_Basic_Salary	22						
MSDers_Basic_Salary	23						
MSDers_Basic_Salary	24						
MSDers_Basic_Salary	25						
MSDers_Basic_Salary	26						
MSDers_Basic_Salary	27						
MSDers_Basic_Salary	28						
MSDers_Basic_Salary	29						
MSDers_Basic_Salary	30						

Calculate

Parameters

Period code: 5637190576

Run in the background

Recurrence Alerts

Batch processing

Task description: Calculate Salary for MSDer_B...

Batch group:

Priority: No

Critical job: No

Monitoring category: None

Start date: 24/11/2025 07:57:53 (GMT) Coordinated Universal Time

OK Cancel

Finance and Operations | T Gates Payroll > Periodic > Period codes

Standard view * ▾

Pay code

Pay code	Period code	Description	Month	From date	To date	Status
MSDer_Bonus_P_Period	1					

MSDers_Racir_Salary

Salary is calculated successfully

Finance and Operations | T Gates Payroll > Periodic > Period codes

Standard view * ▾

Pay code

Pay code	Period code	Description	Month	From date	To date	Status
MSDer_Bonus_P_Period	1		January	11/01/2025	1	
MSDers_Basic_Salary	1		January	01/01/2025	3	

Actions: Calculate, Approve, Cancel approval, Create due journal, Publish ESS, Pay statements lines, Worker pay statements, Due Journals, Employer contribution.

Links: Pay statement, Item totals.

Print: Pay statement, Item totals.

OverView Options

Finance and Operations | T Gates Payroll > Periodic > Period codes

Standard view * ▾

Pay statement number

Pay statement number	Personnel number	Worker	Pay code	Period code	Date	Additions	Deductions	Net Status	Approval Status	Due journal number	Employment	Chart
10MF-000022798	555551	MSDers_Employee_Worker_1	MSDer_Bonus_P_Per...	1	11/01/2025	0,00	0,00	0,00	Calculated	Pending	000008140	

Lines Change status Print Options

Worker pay statements | MSDer_Bonus_P_Period : 1

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Pay statement

Pay statement number	Personnel number	Worker	Status	Approval Status
USMF-0000023799	555551	MSDers Employee Worker 1	Calculated	Pending
Department	Job	Job level	Job family	Location
MSDers Department 1	MSDers, Walaa - Ahmad - Ah...	MSDers Job Level 1	MSDers Job Family 1	
Pay code	Period code	Date	Chargeable days	
MSDer_Bonus_Peri...	1	11/01/2025	30	
AMOUNTS IN REPORTING CURRENCY				
TAXES				
Additions	Deductions	Net	Annual taxable amount	Current taxable amount
2,000.00	600.00	1,400.00	0.00	0.00

Additions **Deductions** Employer contribution

Item ID	Description	Amount	Cur...	Source type	Reference	Date	Group ID
MSDer_Bonus_P_Item	Bonus, Pay item, Graduation project of MSDers	2,000.00	EGP	Bonus	MSDer_Bonus	04/11/2025	MSDers_Addition

Pay statement

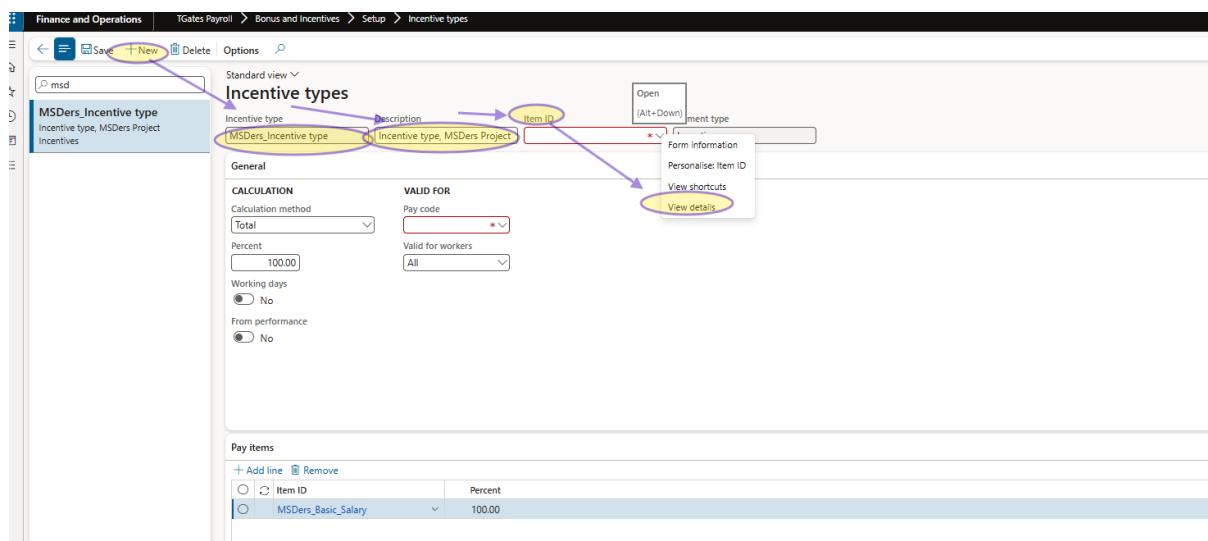
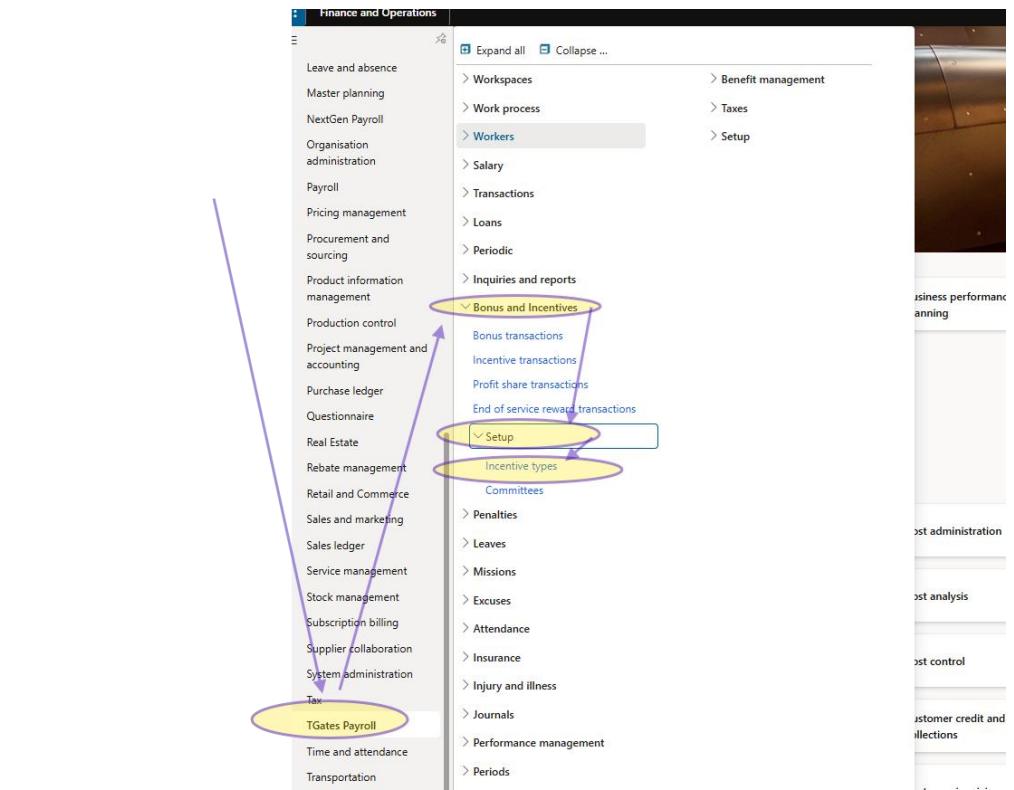
Pay statement number	Personnel number	Worker	Status	Approval Status
USMF-0000023799	555551	MSDers Employee Worker 1	Calculated	Pending
Department	Job	Job level	Job family	Location
MSDers Department 1	MSDers, Walaa - Ahmad - Ah...	MSDers Job Level 1	MSDers Job Family 1	
Pay code	Period code	Date	Chargeable days	
MSDer_Bonus_Peri...	1	11/01/2025	30	
AMOUNTS IN REPORTING CURRENCY				
TAXES				
Additions	Deductions	Net	Annual taxable amount	Current taxable amount
2,000.00	600.00	1,400.00	0.00	0.00

Additions **Deductions** Employer contribution

Item ID	Description	Amount	Cur...	Source type	Reference	Date	Group ID
2_taxes_pay_items	taxes hossam	-600.00	EGP	Tax	USMF-00000052	11/01/2025	2_deduction_pay item gro...

Incentives

TGates payroll > Bonus and incentives > Setup > Incentive types



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Project: Payroll Integration Simulation

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Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Pay items

Item ID: MSDers_Incentives_P.Item	Description: Incentives Pay Item, MSDers Project	Path name: MSDers_Incentives_P.item	Group ID: MSDers_Addition	Suspended: <input checked="" type="checkbox"/>
General				
CALCULATION Calc. Method: Constant Calc. type: Addition TAX : calculate taxes: <input checked="" type="checkbox"/> No Basic : <input checked="" type="checkbox"/> No Hidden : <input checked="" type="checkbox"/> No MISCELLANEOUS : sort: 0.00, Filter title: All, Tax code: External code: Override source type: External code: <input checked="" type="checkbox"/> No				
Pay item groups + Add line: Group ID: Description: Default: MSDers_Addition: Pay item groups - Addition - Graduation project of MSDers				
Accounting + Add line: Remove: Account: Valid for: Worker: Department: Ledger: 110105				

Incentive types

Incentive type: MSDers_Incentive type	Description: Incentive type, MSDers Project	Item ID: MSDers_Incentives_P.Item	Item ID: Incentives
General			
CALCULATION Calculation method: Total Percent : 100.00 Working days: <input checked="" type="checkbox"/> No From performance: <input checked="" type="checkbox"/>		VALID FOR Pay code: * Form information Personalise: Pay code View shortcuts View details	
Pay items + Add line: Remove: Item ID: Percent: MSDers_Basic_Salary: 100.00			

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Project: Payroll Integration Simulation

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Pay Periods

Setup

FREQUENCY: Per [3] Months [Months] Incentives [Yes]

CALCULATE: Salary Entry [No] Loans [Yes] Allowances [No]

INSURANCE: Insurance [No] Salary Plans [No] Variable Entries [No]

INCENTIVES: Leaves [No] Medical and treatment [No] Missions [No] Compensation fixed plans [No]

SETTLE EMPLOYMENT DAYS: Stamp [No] Settle employment days [No] External [No] Chargeable days calculation rule [30 days]

TAX CALCULATION: Tax [Yes]

POSTING: Due journal name [GenInv] Worker payment journal name [GenInv] Vendor payment journal name [MSDers Ven]

MISCELLANEOUS: Filter title [All] External code [] Pay period group ID [MSDers Group ID] Sorting [0]

DUAL CURRENCY: Enable dual currency feature [No]

DUE JOURNAL APPROVAL: Workflow [No]

Period codes

Calculate Cancel

Generate period codes

From date: 01/01/2025

To date: 31/12/2025

Generate

FREQUENCY: Per []

INSURANCE: Insurance [No]

INCENTIVES: Incentives [Yes]

Pay period type: Pay Period, Incentives, MSDer...

Periodic

Pay Periods

Setup

FREQUENCY: Per [3] Months [Months] Incentives [Yes]

CALCULATE: Salary Entry [No] Loans [Yes] Allowances [No]

INSURANCE: Insurance [No] Salary Plans [No] Variable Entries [No]

INCENTIVES: Leaves [No] Medical and treatment [No] Missions [No] Compensation fixed plans [No]

SETTLE EMPLOYMENT DAYS: Stamp [No] Settle employment days [No] External [No] Chargeable days calculation rule [30 days]

TAX CALCULATION: Tax [Yes]

POSTING: Due journal name [GenInv] Worker payment journal name [GenInv] Vendor payment journal name [MSDers Ven]

MISCELLANEOUS: Filter title [All] External code [] Pay period group ID [MSDers Group ID] Sorting [0]

DUAL CURRENCY: Enable dual currency feature [No]

DUE JOURNAL APPROVAL: Workflow [No]

Period codes

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Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Finance and Operations | T Gates Payroll > Bonus and Incentives > Setup > Incentive types

Pay Periods

Pay code	Description	Pay period type
MSDer_Incentives	Pay Period, Incentives, MSDer...	Periodic

Setup

FREQUENCY	Insurance: <input checked="" type="radio"/> Yes, <input type="radio"/> No	Incentives: <input checked="" type="radio"/> Yes, <input type="radio"/> No	Settle employment days: <input checked="" type="radio"/> No, <input type="radio"/> Yes	Stamp: <input checked="" type="radio"/> No, <input type="radio"/> Yes	MISCELLANEOUS
Per:	<input type="radio"/> No	<input checked="" type="radio"/> Yes	External: <input checked="" type="radio"/> No, <input type="radio"/> Yes	Tax method: Regular	Filter title: All
Unit:	<input type="radio"/> Month	<input checked="" type="radio"/> Year	Chargable days calculation rule: 30 days	Proportional tax update: None	External code:
CALCULATE	Salary entry: <input checked="" type="radio"/> Yes, <input type="radio"/> No	Variable Entries: <input checked="" type="radio"/> Yes, <input type="radio"/> No	Medical and treatment: <input checked="" type="radio"/> Yes, <input type="radio"/> No	POSTING	DUE JOURNAL APPROVAL
	Loans: <input checked="" type="radio"/> Yes, <input type="radio"/> No	Missions: <input checked="" type="radio"/> Yes, <input type="radio"/> No	Compensation fixed plans: <input checked="" type="radio"/> Yes, <input type="radio"/> No	Due journal name: GenJrn	Workflow: <input checked="" type="radio"/> Yes, <input type="radio"/> No
	Bonus: <input checked="" type="radio"/> Yes, <input type="radio"/> No			Worker payment journal name: GenJrn	Workflow ID:
				Vendor payment journal name: MSDers Ven	

Period codes

Period code	From date	To date	Payroll calculated	Status
1	01/01/2025	31/03/2025	<input type="checkbox"/>	None
2	01/04/2025	30/06/2025	<input type="checkbox"/>	None
3	01/07/2025	30/09/2025	<input type="checkbox"/>	None
4	01/10/2025	31/12/2025	<input type="checkbox"/>	None
Total	4 rows			

Finance and Operations | T Gates Payroll > Bonus and Incentives > Setup > Incentive types

Incentive types

Incentive type	Description	Item ID
MSDer_Incentive type	Incentive type, MSDers Project	MSDer_Incentives_P.Item

General

CALCULATION	VALID FOR
Calculation method: Total	Pay code: MSDer_Incentives
Percent: 100.00	Valid for workers: All
Working days: Yes	
Working days rule ID: MSDer_W.Days Calc Rule	Form information: Personalise: Working days rule ID
From performance: No	View shortcuts: View details
Pay items: + Add line, Remove	

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Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Finance and Operations | TGates Payroll > Bonus and Incentives > Setup > Incentive types

MSDer_W.Days Calc Rule
 Working days calculation rule, MSDers ...

Standard view ▾
Working days calculation rules

Rule ID	Description
MSDer_W.Days Calc Rule	Working days calculation rule...

Overview

Attendance log	Official vacations	Weekends	Missions
<input checked="" type="checkbox"/> Yes			

Leaves

+ Add line

Leave type
<input checked="" type="checkbox"/> MSDers_Casual Leave
<input type="checkbox"/> MSDers_Annual leave
<input type="checkbox"/> MSDers_Leave

Special leaves

Finance and Operations | TGates Payroll > Bonus and Incentives > Setup > Incentive types

msd

MSDers_Incentive type
 Incentive type, MSDers Project
 Incentives

Standard view ▾
Incentive types

Incentive type	Description	Item ID	Payment type
MSDers_Incentive type	Incentive type, MSDers Project	MSDers_Incentives_P.item	Incentives

General

CALCULATION	VALID FOR
Calculation method <input type="button" value="Total"/>	Pay code <input checked="" type="checkbox"/> MSDer_Incentives
Percent 100.00	Valid for workers <input type="button" value="All"/>
Working days <input checked="" type="checkbox"/> Yes	
Working days rule ID <input type="button" value="MSDer_W.Days Calc Rule"/>	
From performance <input type="radio"/> No	

Pay items

+ Add line

Item ID	Percent
MSDers_Basic_Salary	100.00

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Finance and Operations | Gates Payroll | Bonus and Incentives | Setup | Incentive types

Save + New Delete Options

msd

MSDers_Incentive type
Incentive type, MSDers Project incentives

Standard view ▾

Incentive types

Incentive type	Description	Item ID	Payment type
MSDers_Incentive type	Incentive type, MSDers Project	MSDers_Incentives_PItem	Incentives

General

CALCULATION	PERFORMANCE	VALID FOR
Calculation method <input type="button" value="Total"/>	Review type <input type="button" value="MSDerIApraisal"/>	Pay code <input type="button" value="MSDer_Incentives"/>
Percent <input type="text" value="100.00"/>	Performance percent calculation ... <input type="button" value="Average"/>	Valid for workers <input type="button" value="All"/>
Working days <input type="radio" value="No"/>		
From performance <input checked="" type="checkbox"/>		

Pay items

+ Add line	Remove	
<input type="radio"/>	<input type="button" value="Item ID"/>	Percent
<input type="radio"/>	<input type="button" value="MSDers_Basic_Salary"/>	100.00

Performance percent rules

+ Add line	Remove				
<input type="radio"/>	<input type="button" value="Line ↑"/>	<input type="button" value="From perc..."/>	<input type="button" value="To percent"/>	<input type="button" value="Outcome percent t..."/>	<input type="button" value="Final percent"/>

We didn't find anything to show here.

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Finance and Operations | Gates Payroll > Bonus and Incentives > Setup > Incentive types

Save Delete Options

Standard view < Incentive types

Incentive type	Description	Item ID	Payment type
MSDers_Incentive type	Incentive type, MSDers Project Incentives	MSDers_Incentives_P.Item	Incentives

General

CALCULATION	PERFORMANCE	VALID FOR
Calculation method <input type="button" value="Total"/>	Review type <input type="button" value="MSDerA.Appraisal"/>	Pay code <input type="button" value="MSDer_Incentives"/>
Percent <input type="button" value="100.00"/>	Performance percent calculation ... <input type="button" value="Average"/>	Valid for workers <input type="button" value="All"/>
Working days <input checked="" type="radio"/> No		
From performance <input checked="" type="radio"/> Yes		

Pay items

+ Add line

Item ID	Percent
MSDers_Basic_Salary	100.00

Performance percent rules

+ Add line

Line	From percent	To percent	Outcome percent type	Final percent
1.0	1.00	50.00	No change	0.00
2.0	51.00	65.00	Custom	20.00
3.0	66.00	80.00	Custom	50.00
4.0	81.00	90.00	Custom	80.00
5.0	90.00	100.00	Custom	100.00

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Incentive types

Incentive type	Description	Item ID	Payment type
MSDers_Incentive type	Incentive type, MSDers Project Incentives	MSDers_Incentives_P.item	Incentives

Calculation method: Total | Pay code: MSDer_Incentives | Valid for workers: Table (highlighted)

Percent: 100.00 | Working days: No | From performance: No

Pay items

+ Add line	Remove	Item ID	Percent
		MSDers_Basic_Salary	100.00

Workers

+ Add line	Remove	Worker group	Worker	Employee percent	Limit type	Min. Amount	Max. Amount	Suspended
		MSDer Worker Group	MSDers Employee Worker 1	100.00	Output	0.00	0.00	<input type="checkbox"/>

We didn't find anything to show here.

Incentive types

Incentive type	Description	Item ID	Payment type
MSDers_Incentive type	Incentive type, MSDers Project Incentives	MSDers_Incentives_P.item	Incentives

General

CALCULATION: Total | VALID FOR: Pay code: MSDer_Incentives | Valid for workers: Table (highlighted)

Percent: 100.00 | Working days: No | From performance: No

Pay items

+ Add line	Remove	Item ID	Percent
		MSDers_Basic_Salary	100.00

Workers

+ Add line	Remove	Worker group	Worker	Employee percent	Limit type	Min. Amount	Max. Amount	Suspended
		MSDer Worker Group	MSDers Employee Worker 1	100.00	Output	0.00	0.00	<input type="checkbox"/>
				100.00	Output	0.00	0.00	<input type="checkbox"/>

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Finance and Operations

Save + New Delete Options

Standard view

Incentive types

Incentive type: MSDer_Incentive type

Description: Incentive type, MSDers Project Incentives

Item ID: MSDer_Incentives_PItem

Payment type: Incentives

General

CALCULATION

Calculation method: Total

Percent: 100.00

Working days: No

From performance: No

VALID FOR

Pay code: MSDer_Incentives

Valid for workers: Table

Pay items

+ Add line

Item ID	Percent
MSDer_Constant_Adoption	100.00
MSDer_Basic_Salary	100.00

Workers

+ Add line

Worker group	Worker	Employee percent	Limit type	Min. Amount	Max. Amount	Suspended
MSDer Worker Group	MSDers Employee Worker 1	100.00	Output	0.00	0.00	<input type="checkbox"/>
		100.00	Output	0.00	0.00	<input type="checkbox"/>

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Finance and Operations

- > Workspaces
- > Work process
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 - > Bonus and Incentives
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- > Insurance
- > Injury and illness
- > Journals
- > Performance management
- > Periods
- > Employer contribution
- > Benefit management

TGates Payroll

Time and attendance

Transportation management

Copilot for (Preview)

Expense m...

Feature ma...

Financial ai companies

Financial ai current cor...

Financial p...

Finance and Operations | TGates Payroll > Bonus and Incentives > Incentive transactions

New Record

General		CALCULATION		VALID FOR	
Incentive ID	USMF-000000123	Description	Incentive type: MSDers Project	Date	4/1/2025
Incentive type	MSDers_Incentive type	Pay code	MSDers_Incentives	Period code	1
				Items ID	MSDers_Incentives_B_Items
				Calculation method	Total
				Percent	100.00
				Include calculation details	<input checked="" type="checkbox"/> Yes
				From performance	<input type="radio"/> No
				Proportional tax	<input checked="" type="checkbox"/> Yes
				VALID FOR	
				Valid for workers	All
				Approval Status	Pending
				Payroll calculated	No

Lines

Worker	Gross amo...	Employee percent	Att. Percent	Performance percent	Net before...	Tax percent	Tax amount	Net after tax	Currency
Worker									

Finance and Operations | TGates Payroll > Bonus and Incentives > Incentive transactions

USMF-000000123 : Incentive type: MSDers Project

Pay Periods		
Add line	Remove	
Pay code	Period code	
Basic salary - 2025	1	100.00
Basic salary - 2025	2	100.00
Basic salary - 2025	3	100.00

Pay Items

Add line	Remove
Item ID	Resent Original amount
MSDers_Basic_Salary	100.00
MSDers_Constant_Addition	100.00

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Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Screenshot 1: Incentive Transactions - Standard view

This screenshot shows the 'Incentive transactions' screen in Microsoft Dynamics 365 HR & Payroll. The header displays the ID 'USMF-000000123' and the description 'Incentive type, MSDers Project'. The 'General' section includes fields for Incentive ID (USMF-000000123), Description (Incentive type, MSDers Project), Date (31/03/2025), Period code (1), Calculation method (Total), and Item ID (MSDer_Incentives_P_item). The 'Lines' section shows a single row for 'MSDers Employee Worker 1' with a Gross amount of 90,000.00, Employee percent of 100.00, Att. Percent of 100.00, Performance percent of 100.00, Net before tax of 90,000.00, Tax percent of 22.50, Tax amount of 20,250.00, and Net after tax of 69,750.00 EGP.

Screenshot 2: Incentive Transactions - Standard view (Detailed View)

This screenshot provides a detailed view of the 'Lines' section from the previous screen. It shows five rows for 'MSDers Employee Worker 1' with different pay codes: MSDers_Basic_Salary_1, MSDers_Basic_Salary_2, and MSDers_Basic_Salary_3. Each row has a Gross amount of 30,000.00, Employee percent of 100.00, Att. Percent of 100.00, and Pay item amount of 30,000.00. The period percent is 100.00, pay item percent is 100.00, incentive percent is 100.00, and the total gross amount is 30,000.00 EGP.

Screenshot 3: Periodic - Overview

This screenshot shows the 'Periodic' screen in Microsoft Dynamics 365 HR & Payroll. The 'Actions' bar includes 'Calculate Salary', 'Approve', 'Create due journal', 'Pay statements lines', 'Due Journals', 'Worker pay statements', 'Employer contribution', 'Print', and 'Pay statement Item totals'. The table lists three period codes: 'MSDer_Bonus_P_Period' (Period code 1, Month January, From date 11/01/2025, To date 11/01/2025, Status None), 'MSDer_Incentives' (Period code 1, Month March, From date 01/01/2025, To date 31/03/2025, Status None), and 'MSDer_Incentives' (Period code 2, Month June, From date 01/04/2025, To date 30/06/2025, Status None).

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Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Finance and Operations | TGates Payroll > Periodic > Period codes

Salary is calculated successfully

[Edit](#) [Delete](#) [Overview](#) [Options](#) [Print](#)

Period codes

Standard view * ~

msd

Pay code	Period code	Description	Month	From date	To date	Payroll calculated	Status
MSDer_Bonus_P_Period	1		January	11/01/2025	11/01/2025		None
MSDer_Incentives	1		March	01/01/2025	31/03/2025	✓	Calculated
MSDer_Incentives	2		June	01/04/2025	30/06/2025		None
MSDer_Incentives	3		September	01/07/2025	30/09/2025		None
MSDer_Incentives	4		December	01/10/2025	31/12/2025		None

Finance and Operations | TGates Payroll > Periodic > Period codes

Salary is calculated successfully

[Edit](#) [Delete](#) [Overview](#) [Options](#) [Print](#)

Calculate Salary Actions Links Print

Pay code	Period code	Description	Month	From date	To date	Payroll calculated	Status
MSDer_Bonus_P_Period	1		January	11/01/2025	11/01/2025		None
MSDer_Incentives	1		March	01/01/2025	31/03/2025	✓	Calculated
MSDer_Incentives	2		June	01/04/2025	30/06/2025		None

Finance and Operations | TGates Payroll > Periodic > Period codes

[Edit](#) [Lines](#) [Change status](#) [Print](#) [Options](#)

Worker pay statements | MSDers_Incentives : 1

Standard view ~

Filter

Pay statement number	Personnel number	Worker	Pay code	Period code	Date	Additions	Deductions	Net Status	Approval Status
USMF-0000031701	555551	MSDers Employee Worker 1	MSDer_Incentives	1	31/03/2025	0.00	0.00	0.00	Calculated Pending
USMF-0000031702	555552	MSDers Employee Worker 2	MSDer_Incentives	1	31/03/2025	0.00	0.00	0.00	Calculated Pending
USMF-0000031703	555553	MSDers Employee Worker 3	MSDer_Incentives	1	31/03/2025	0.00	0.00	0.00	Calculated Pending
USMF-0000031704	555554	MSDers Employee Worker 4	MSDer_Incentives	1	31/03/2025	0.00	0.00	0.00	Calculated Pending
USMF-0000031705	000777	MSDers Safwan Zahran	MSDer_Incentives	1	31/03/2025	0.00	0.00	0.00	Calculated Pending

Finance and Operations | TGates Payroll > Periodic > Period codes

[Edit](#) [Change status](#) [Print](#) [Options](#)

USMF-0000031705 : MSDers Safwan Zahran | Standard view ~

Pay statement

Pay statement number	Personnel number	Worker	Status	Approval Status
USMF-0000031705	000777	MSDers Safwan Zahran	Calculated	Pending

Department Job Job level Job family Location

MSDers Department 1 MSDers, Position 1-Safwan - ... MSDers Job Level 1 MSDers Job Family 1

Pay code Period code Date Chargeable days

MSDer_Incentives 1 31/03/2025 30

AMOUNTS IN REPORTING CURRENCY TAXES

Additions	Deductions	Net	Annual taxable amount	Current taxable amount
90,000.00	20,250.00	69,750.00	0.00	0.00

Additions Deductions Employer contribution

Item ID	Description	Amount Cur...	Source type	Reference	Date	Group ID
MSDer_Incentives_P_item	Incentives Pay Item, MSDers Project	90,000.00	EGP Bonus	USMF-000000123	31/03/2025	MSDers_Addition

CAI3_ERP8_G3 MSD HCM Application Consultant/Management &ERP

Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Finance and Operations TGates Payroll Periodic Period codes

Save Change status Print Options

USMF-0000031705 : MSDers Safwan Zahran | Standard view

Pay statement

Pay statement number	Personnel number	Worker	Status	Approval Status
USMF-0000031705	000777	MSDers Safwan Zahran	Calculated	Pending
Department	Job	Job level	Job family	Location
MSDers Department 1	MSDers, Position 1-Safwan - ...	MSDers Job Level 1	MSDers Job Family 1	
Pay code	Period code	Date	Chargeable days	
MSDer_Incentives	1	31/03/2025	30	

AMOUNTS IN REPORTING CURRENCY **TAXES**

Additions	Deductions	Net	Annual taxable amount	Current taxable amount
90,000.00	20,250.00	69,750.00	0.00	0.00

Additions [Deductions](#) Employer contribution

Item ID	Description	Amount	Curr...	Source type	Reference	Date	Group ID
2_taxes_pay_items	taxes hossam	-20,250.00	EGP	Tax	USMF-00000123	31/03/2025	2_deduction_pay item gro...

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Project: Payroll Integration Simulation

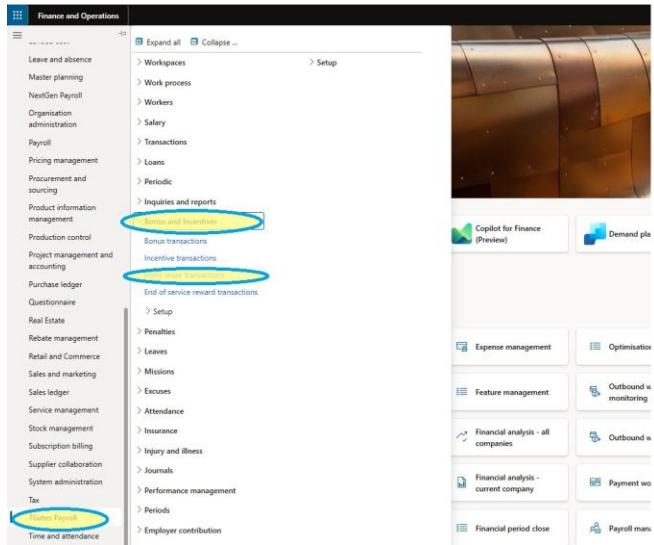
Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Profit share

TGates payroll > Bonus and incentives > Profit share transactions



The screenshot shows the 'Pay Periods' setup screen in Microsoft Dynamics 365. The 'Pay code' field is set to 'MSDers_Profit Share' and the 'Pay period type' is 'Periodic'. The 'FREQUENCY' section shows 'Pay' set to '1' and 'Unit' set to 'Years'. The 'CALCULATE' section includes fields for 'Safety entry', 'Loans', 'Allowances', and 'Bonus'. The 'TAX CALCULATION' section has 'Tax' set to 'Yes'. The 'POSTING' section includes fields for 'Our journal name', 'Worker payment journal name', and 'Vendor payment journal name'. The 'PERIOD CODES' section shows a table with one row: 'Period code' (empty), 'From date' (empty), 'To date' (empty), 'Payroll calculated' (checkbox checked), and 'Status' (empty).

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Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



This screenshot shows the 'Pay Periods' setup screen in Microsoft Dynamics 365. It includes fields for Pay code, Description, Pay period type, Frequency (e.g., Bi-weekly), and various payroll-related settings like Insurance, Accrues, Settle employment days, Stamp, and Miscellaneous. A 'Period codes' section lists a single period from 01/01/2025 to 31/12/2025.

This screenshot shows the Microsoft Dynamics 365 main navigation menu. The 'Payroll' option is highlighted with a yellow circle. Other menu items include Finance and Operations, Sales, Marketing, Customer Service, and more.

This screenshot shows the 'Pay Items' configuration screen. It displays a list of pay items in Arabic, such as 'أجور ملحوظة', 'أجور إعفاء', and 'أجور إعفاء'. The screen includes sections for General settings (Calculation, Tax, Miscellaneous), Pay item groups, and Accounting (Ledger, Account type, Account, Valid for, Worker, Department).

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Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



This screenshot shows the Microsoft Dynamics 365 Finance and Operations interface. On the left, there's a navigation tree under 'Finance and Operations' with various modules like Leave and absence, Master planning, NetSuite Payroll, etc. A blue circle highlights the 'Incentive types' link under the 'Setup' section. The main area shows a dashboard with cards for Capital for Finance (Preview), Demand planning, and HR. Below the dashboard, there are several grid-based tiles for different financial and operational management features.

This screenshot shows the 'Incentive types' setup screen in Microsoft Dynamics 365. The top navigation bar includes 'Save', '+ New', 'Delete', 'Options', and a search icon. On the left, a filter sidebar lists categories such as 'نهاية الخدمة', 'حافز', 'مشاركة ارباح', '2_end of service', '2_incentive_Incentive types', '2_profit share', '2', and 'Card Tax'. The main panel has sections for 'Standard view' and 'Incentive types'. Under 'Incentive types', fields include 'Incentive type' (MSDers_Profit Share), 'Description' (Incentive type, Profit Share, ...), 'Item ID' (MSDers_Profit Share_P_Item), and 'Payment type' (Incentives). The 'General' section contains fields for 'CALCULATION' (Calculation method: Total), 'VALID FOR' (Pay code: MSDers_Profit Share), 'Working days' (radio button for 'No'), and 'From performance' (radio button for 'No'). The 'Pay items' section shows a table with one row: 'Item ID' (MSDers_Basic_Salary) and 'Percent' (100.00).

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Project: Payroll Integration Simulation

Instructor: Eng. Mahmoud Ahmad

Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



The screenshot shows the Microsoft Dynamics 365 Finance and Operations interface. The left sidebar lists various modules such as Leave and absence, Master planning, NextGen Payroll, Organization administration, Payroll, Pricing management, Procurement and sourcing, Product information management, Production control, Project management and accounting, Purchase ledger, Questionnaire, Real estate, Rebate management, Retail and Commerce, Sales and marketing, Sales ledger, Service management, Stock management, Subscription billing, Supplier collaboration, System administration, Tax, and Time and attendance. A yellow circle highlights the 'Time and attendance' link under 'Finance and Operations'. The main area displays a grid of tiles for different modules like Demand planning, Human Resources, and Invoice management.

The screenshot shows the Microsoft Dynamics 365 Payroll interface. The top navigation bar includes 'Finance and Operations', 'TGates Payroll', 'Sonus and Incentives', and 'Profit share transactions'. Below the navigation is a toolbar with actions like 'New Record', 'Save', 'Delete', 'Calculate', 'Approval', and 'Options'. The main area is titled 'New Record' and contains sections for 'General' and 'Lines'. In the 'General' section, fields include 'Incentive ID' (USMF-000000134), 'Description' (Incentive type: Profit Share, ...), 'Date' (31/12/2025), 'Period code' (1), 'CULATION' (Calculation method: Total), 'Percent' (0.00), 'From performance' (radio button 'No'), 'VALID FOR' (Valid for workers: All), 'Approval Status' (Pending), and 'Payroll calculated' (radio button 'No'). A yellow circle highlights the 'Payroll calculated' field. The 'Lines' section has a table with columns: Worker, Gross amo..., Employee percent, Att. Percent, Performance percent, Net before tax, Tax percent, Tax amount, and Net after tax. A note says 'We didn't find anything to show here.' The bottom section is titled 'Line details' with a table for 'Calculation details'.

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Project: Payroll Integration Simulation

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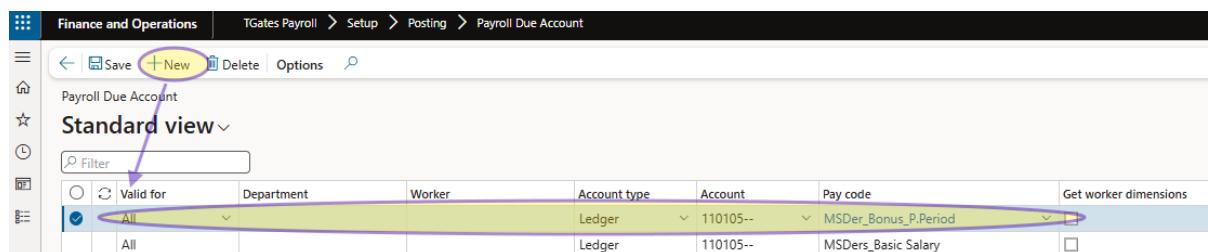
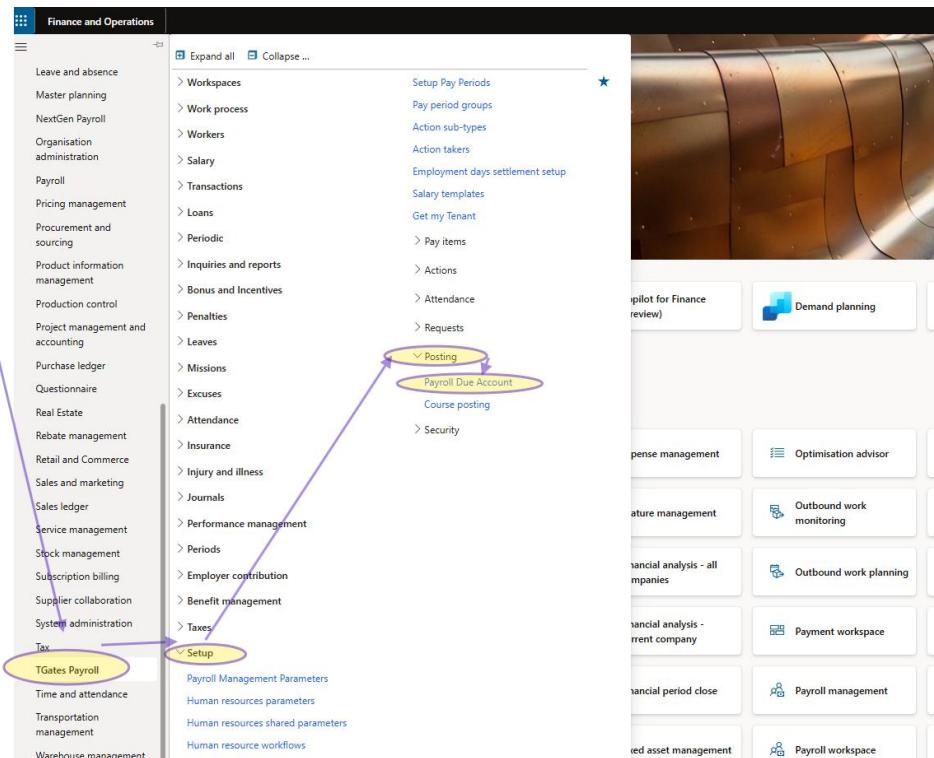
The screenshot displays the Microsoft Dynamics 365 HR & Payroll application. On the left, a navigation menu titled "Finance and Operations" lists numerous modules such as Leave and absence, Master planning, NextGen Payroll, Organisation administration, Payroll, Pricing management, Procurement and sourcing, Product information management, Production control, Project management and accounting, Purchase ledger, Questionnaire, Real Estate, Rebate management, Retail and Commerce, Sales and marketing, Sales ledger, Service management, Stock management, Subscription billing, Supplier collaboration, System administration, Tax, and Times Payroll. Two specific items, "Bonuses and incentives" and "Times Payroll", are highlighted with yellow circles.

The main area of the interface shows several management tools arranged in a grid:

- Copilot for Finance (Preview)
- Demand planning
- Expense management
- Optimisation advisor
- Feature management
- Outbound work monitoring
- Financial analysis - all companies
- Outbound work planning
- Financial analysis - current company
- Payment workspace
- Financial period close
- Payroll management

Financial Posting

TGates payroll > Setup > Payroll due account



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Project: Payroll Integration Simulation

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TGates payroll > Setup > Setup pay periods

The screenshot shows the 'Setup Pay Periods' screen in TGates payroll. It includes sections for 'Pay Periods' (with a selected item 'MSDers_Basic_Salary'), 'Setup' (frequency per month, calculate salary entry, allowances), 'TAX CALCULATION' (regular tax method), 'POSTING' (posting to 'Genalm' journal), and 'MISCELLANEOUS' (filter title 'All'). Below is a table for 'Period codes' with rows from 1 to 6.

Period code	From date	To date	Payroll calculated	Status
1	01/01/2025	31/01/2025	<input type="checkbox"/>	None
2	01/02/2025	28/02/2025	<input type="checkbox"/>	None
3	01/03/2025	31/03/2025	<input type="checkbox"/>	None
4	01/04/2025	30/04/2025	<input type="checkbox"/>	None
5	01/05/2025	31/05/2025	<input type="checkbox"/>	None
6	01/06/2025	30/06/2025	<input type="checkbox"/>	None
Total				132 rows

TGates payroll > Workers > Employees

The screenshot shows the 'Employees (Active)' screen in TGates payroll. A search bar 'msd' and a 'View options' dropdown are at the top. The main area lists employees with columns for Name, Worker type, Search name, Email address, ID No., Phone, and Experience. One row, 'MSDers Employee Worker 1', is highlighted with a yellow oval.

Name	Worker type	Search name	Email ad...	ID No.	Phone	Ex...
MSDers Worker Employee 1	Employee	MSDers Worker Employee 1		0000055...		
Msders Eslam 04	Employee	Msders Eslam 04		00132		
MSDers Employee Worker 5	Employee	MSDers Employee Worker 5		555555		
MSDers Employee Worker 4	Employee	MSDers Employee Worker 4		555554		
MSDers Employee Worker 3	Employee	MSDers Employee Worker 3		555553		
MSDers Employee Worker 2	Employee	MSDers Employee Worker 2		555552		
MSDers Employee Worker 1	Employee	MSDers Employee Worker 1		555551		
MSDERS Employee Eslam	Employee	MSDERS Employee Eslam		Msders E...		

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TGates Payroll > Workers > Employees

Employees (Active) | Standard view

MSDers Employee Worker 1 555551
MSDers Title 1 • MSDers Department 1 • Employee
Contoso Entertainment System USA

Profile Work history Positions Commerce Time registration Links Periods Penalties Appraisals Payroll

General Salary lines Pay statement Loans Employee accruals Bonus Leaves Bank accounts Filter codes

Bank accounts Disbursements

+ Add line Remove

Account id...	Name	Bank account	Bank account number	Account holder	Branch name	Branch number	Bank location code	Name of person	Mobile phone	SWIFT code
CLB-EGP	MSDers Employee Worker 1	USMDF PAYRL	123456789123456	Cairo						

TGates payroll > Setup > Pay items > Pay items

Finance and Operations

- Leave and absence
- Master planning
- NexGen Payroll
- Organization administration
- TGates Payroll**
- Pricing management
- Procurement and sourcing
- Product information management
- Production control
- Purchase ledger
- Questionnaire
- Real Estate
- Rebate management
- Retail and Commerce
- Sales and marketing
- Sales ledger
- Service management
- Stock management
- Subscription billing
- Supplier collaboration
- System administration
- Tax
- Time and attendance

Expand all Collapse ...

Workspaces

Setup Pay Periods

Pay period groups

Action sub-types

Action takers

Employment days settlement setup

Salary templates

Get my tenant

Pay items

Pay item groups

Pay Items List

Actions

Attendance

Requests

Posting

Security

TGates Payroll > Setup > Pay items > Pay items

Standard view

Pay items

Item ID	Description	Search name	Group ID	Suspended
MSDers_Bonus_Pitem	Bonus Pay Item, Graduation project of...	MSDers_Bonus_Salary	MSDers_Addition	No
MSDers_Employee_Insurance...	Pay items, Employee Insurance, Graduate...			
MSDers_Employer_Contr_Pitem	Employer Contribution Pay Item, Graduat...			
MSDers_Penalty_Basic_Pitem	Penalties Setup, Penalty Reverse Pay It...			
MSDers_Penalty_Bonus_Pitem	Penalties Setup, Penalty Reverse Pay It...			
MSDers_Pl_Var_Adr_AmountC...	Variable_Pitem_AmountCap,Addition...			
MSDers_Pl_Var_Adr_HourlyCap...	Variable_Pitem_HourlyCap,Addition...			
MSDers_Pl_Var_Ded_Amount...	Variable_Pitem_AmountCap,Deliction...			
MSDers_Salary_Deduction_Pit...	Salary Deduction, Pay Item, Penalties S...			
MSDers_Travel_Allowance_Pit...	Travel Allowance Pay Item, Graduation p...			
MSDers_Basic_Salary	MSDers_Basic_Salary, Pay item, Graduat...			
MSDers_Bonus_Salary	MSDers_Bonus_Salary, Pay item, Graduat...			
MSDers_Constant_Deduction	Constant Deduction - Graduation proj...			
MSDers_Employer_Contributi...	Employer Contribution Insurance Pay It...			
MSDers_Payment_Addition...	Constant Pay Item Addition - Graduat...			

General

Calculation

Calc. Method: Constant

Calc. type: Addition

Calculator instance: Yes

Base Calc: No

Based on chargeable days: No

TAX

Comptable base: Yes

Base: No

Hidden: No

Sort: 0.00

Filter title: All

Tax code: External code

MISCELLANEOUS

Currency: EGP

Pay item groups

+ Add line Remove

Group ID: MSDers_Addition

Description: Pay item groups - Addition - Graduation project of MSDers

Default

Accounting

+ Add line Remove

Account type: Ledger

Account: 110105

Valid for: Worker

Department:

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Project: Payroll Integration Simulation

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Prepared by: Safwan – Walaa – Ahmad – Eslam – Ahmad



Pay items

Item ID	Description	Search name	Group ID	Suspended
MSDer_Employer Cont_P.Item	Pay item, Employer Contribut...	MSDer_Employer Cont_P.Item	MSDers_Deduction	<input checked="" type="checkbox"/> No

General

CALCULATION	TAX	MISCELLANEOUS	sort	External code	EMPLOYER CONTR
Calc. Method <input type="button" value="Constant"/>	Calculate taxes <input checked="" type="checkbox"/> No	Currency EGP	0.00		Account type <input type="button" value="Ledger"/>
Calc. type <input type="button" value="Deduction"/>	Do not exceed max exempted a... <input checked="" type="checkbox"/> No	Basic <input checked="" type="checkbox"/> No	Filter title All		Account 110105--
Calculate insurance <input checked="" type="checkbox"/> No		Hidden <input checked="" type="checkbox"/> No	Tax code		
Base Calc. <input checked="" type="checkbox"/> No					
Based on chargeable days <input checked="" type="checkbox"/> No					

EMPLOYER CONTRIBUTION

Employer contribution ID
MSDer_Employer_...

Pay item groups

+ Add line Remove

Group ID	Description	Default
MSDers_Deduction	Pay item groups - Deduction - Graduation project of MSDers	✓

Accounting

+ Add line Remove

Account type	Account	Valid for	Worker	Department
Ledger	110105--	All		

Finance and Operations TGates Payroll > Periodic > Period codes

(1) Salary is calculated successfully

Actions		Links		Print	
Calculate Salary	Approve	Create due journal	Pay statements lines	Due Journals	Pay statement
Cancel	Cancel approval	Publish Ess	Worker pay statements	Employer contribution	Item totals
<input type="radio"/> Pay code			↑ Period code	Description	Month
MSDers_Basic Salary			8		August
MSDers_Basic Salary			9		September
<input checked="" type="radio"/> MSDers_Basic Salary			10		October
					From date
					31/08/2025
					To date
					30/09/2025
					Payroll calculated
					<input checked="" type="checkbox"/>
					Status
					None
					Calculated
					Calculated

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Finance and Operations

- 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
- Questionnaire
- Real Estate
- Rebate management
- Retail and Commerce
- Sales and marketing
- Sales ledger
- Service management
- Stock management
- Subscription billing
- Supplier collaboration
- System administration
- Tax
- TGates Payroll**
- Time and attendance

Workspaces

Workers

Salary

Transactions

Loans

Periodic

Inquiries and reports

Bonus and Incentives

Penalties

Leaves

Missions

Excuses

Attendance

Insurance

Injury and illness

Journals

Due Journals

Payroll payment journals (bank transfer)

Vendor payment journals

Payroll ledger journal

Performance management

Periods

Employer contribution

Benefit management

Business planning

Compensation management

Confirmed orders with

Cost account administration

Cost admin

Cost analysis

Finance and Operations | TGates Payroll > Journals > Due Journals

Standard view										
Due Journals										
<input type="button" value="Save"/> <input type="button" value="New"/> <input type="button" value="Delete"/> <input type="button" value="Lines"/> <input type="button" value="Update"/> Delete journal from GL Transfer to Ledger Bank transfer Vendor payments Options <input type="text" value="Search"/>										
<input type="radio"/> Due job... <input type="radio"/> Date <input type="text" value="Filter"/> Description Pay code Period code Journal batch number Posted Posted on Workflow Status Total in reporting currency										
USMF-0001 06/11/2025 Msders_Basic Salary 10 Not posted										

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Finance and Operations

[Save](#) [Delete journal from GL](#) [Transfer to Ledger](#) [Bank transfer](#) [Vendor payments](#) [Options](#) [Search](#)

Standard view ▾

Due Journal Lines

Due journal number USMF-000000004	Description	Journal batch number	Posted	Posted on
Pay code MSDers_Basic_Salary	Period code 10	Date 06/11/2025	Total in reporting currency 0.00	

[Lines](#) [Financial dimensions](#)

[Print statement view](#) [Personnel number](#) [Workers](#) [Name ID](#) [Description](#) [Assumptions](#) [Name Account](#) [Amount](#) [Account type](#) [Name Account](#) [Rate](#) [+ Add](#)

Finance and Operations | Human resources > Workers > Employees

[Save](#) [Change status](#) [Print](#) [Options](#) [Search](#)

Standard view ▾

Pay statement

Pay statement number USMF-0000024035	Personnel number 555551	Worker MSDers Employee Worker 1	Status Calculated	Approval Status Approved
Department MSDers Department 1	Job MSDers, Walaa - Ahmad - Ah...	Job level MSDers Job Level 1	Job family MSDers Job Family 1	Location
Pay code MSDers_Basic_Salary	Period code 10	Date 31/10/2025	Chargeable days 31	

AMOUNTS IN REPORTING CURRENCY

		TAXES	
Additions 35,000.00	Deductions 7,328.95	Net 27,671.05	Annual taxable amount \$336,520.00
			Current taxable amount 336,520.00

[Additions](#) [Deductions](#) [Employer contribution](#)

<input type="radio"/> Item ID	Description	Amount	Cur...	Source type	Reference	Date	Group ID
MSDers_Basic_Salary	MSDers_Basic_Salary, Graduation project of MSD...	30,000.00	EGP	Constant	555551	31/10/2025	MSDers_Addition
MSDers_Constant_Addition	Pay Item - Constant Addition, Graduation projec...	5,000.00	EGP	Constant	555551	31/10/2025	MSDers_Addition