



Sentrifugo  
open source HRMS

## 3.1 Sentrifugo User Guide

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# Introduction

This is a post installation guide to provide users information on how to use Sentrifugo easily. If you require instructions for installing Sentrifugo, please follow this link: <http://www.sentrifugo.com/installation-guide>.

This guide comprises of a detailed description of Sentrifugo’s features, capabilities, and step-by-step procedures to use this application efficiently.

## Prerequisite Skills

Sentrifugo end users do not require any specialized or additional technical skills to use the application.

## How to Use This Guide

We would recommend you to follow this guide in a sequential order of the chapters. The chapters have been placed in a progressive order to help you use Sentrifugo optimally. Sentrifugo 3.0 User Guide’s chapters consist of ‘How to’ questions to make it easier for users to locate solutions for their queries. Following are some of the frequently used conventions across the user guide:

Convention/Icon	Description
	Tip icon used in this document to highlight easy to use tips to simplify your Sentrifugo experience.
	Note icon used in this document to highlight important points.
	View icon used in Sentrifugo application
	Edit icon used in Sentrifugo application
	Delete icon used in Sentrifugo application
	More actions icon used in Sentrifugo application
	Information icon used in Sentrifugo. Hover the mouse pointer over this icon to view a brief description for an option

# 1. Getting Started

## 1.1 What are the roles available in Sentrifugo?

### 1.1.1 Super Admin

Super Admin installs the application and provides his email credentials while installing. He/she is responsible for setting up and configuring the application to make it ready for use. The Super Admin will be the first employee in the application, for example: EMP0001 or SENT0001. However in Sentrifugo, the Super Admin will not be included in the organization's employees' list. The employees' list starts from the second employee (Organization Head).

The Super Admin has unlimited access over the entire application. In other words, he/she has full control, and is responsible for administering Sentrifugo.



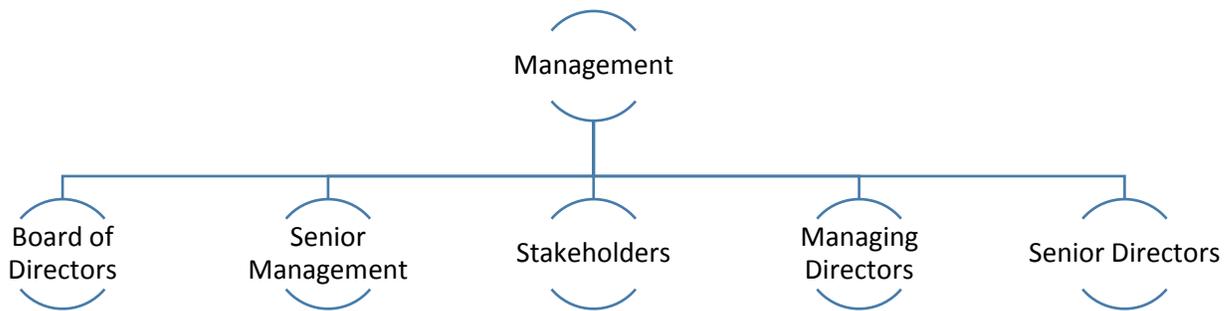
Since the Super Admin will not be included in the employee's list, he/she will not be able to perform employee actions like raising a leave request, service request, submitting timesheets etc. You can add another employee to Sentrifugo for the Super Admin user, with his/her actual details like Name, Job Title, Reporting Manager etc.

### 1.1.2 Default Role Groups in Sentrifugo

There are 6 main role groups available by default in Sentrifugo:

- Management
- Manager
- HR
- Employee
- System Admin
- External User

Within each role group a maximum of 5 role groups can be created. For example:



## 1.2 How do I log in to Sentrifugo?

### 1.2.1 Super Admin

After installing Sentrifugo your (Super Admin) credentials will be sent to your email address and will also be available in a downloadable PDF file. To access the application follow the link provided on the screen after installation.

Please refer Figure 1.



Figure 1

- Super Admin login credentials
- Follow this link to open the application
- Download PDF file containing login credentials

Super Admin receives the below email:

Please refer Figure 2.



Dear Super Admin,

Sentrifugo has been successfully installed. Following are the Super Admin login credentials for Sentrifugo:

Username : empp0001  
Password : 57b69a6fc1cdd <sup>a</sup>

Pre-requisites
PHP v5.3 or greater
PDO-Mysql extension for PHP (pdo_mysql)
GD Library (gd)
Open SSL (openssl)
Database Settings
Host: localhost
User name: root
Password: --
Database: sentrifugo1
Application Settings
Application name: Sentrifugo
Email: <a href="mailto:vradhika@sapplica.com">vradhika@sapplica.com</a>
Mail Server Settings
Authentication: true
User name: <a href="mailto:tejadeveloper123@gmail.com">tejadeveloper123@gmail.com</a>
Password: sapplica
SMTP server: <a href="mailto:sntp.gmail.com">sntp.gmail.com</a>
Secure Transport Layer: TLS
Port: 587
Cron Job
<a href="http://localhost/Sentrifugo/index.php/cronjob">http://localhost/Sentrifugo/index.php/cronjob</a>
<a href="http://localhost/Sentrifugo/index.php/cronjob/empdocsexpiry">http://localhost/Sentrifugo/index.php/cronjob/empdocsexpiry</a>
<a href="http://localhost/Sentrifugo/index.php/timemanagement/cronjob">http://localhost/Sentrifugo/index.php/timemanagement/cronjob</a>

Regards,  
**Sentrifugo**

Figure 2

## 1.2.2 Employees/Users

After the HR/Management/Super Admin adds you to Sentrifugo, your credentials will be sent to your provided email address. You can access the application through the [link](#) provided in the email containing your credentials.

*Please refer Figure 3.*

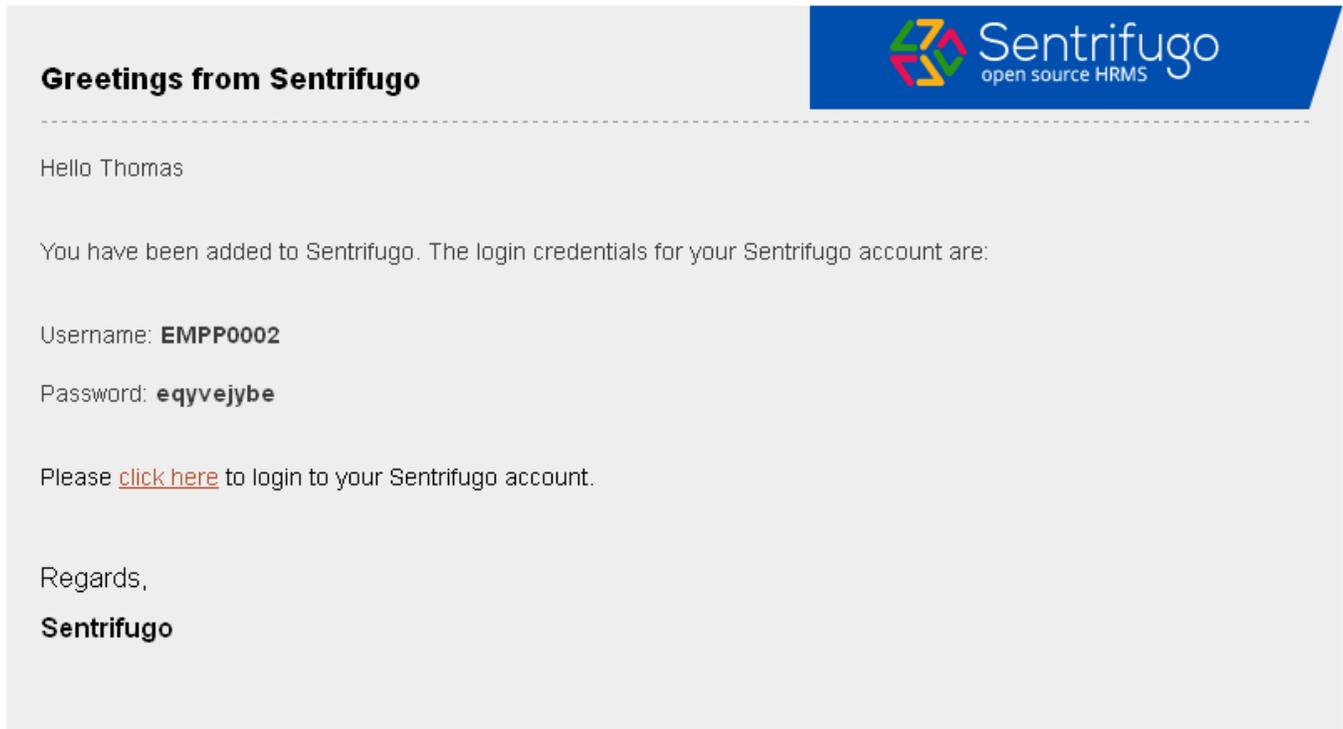


Figure 3

The [link](#) leads you to the Sentrifugo login screen.



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You can log in using your employee ID or your registered email address.

## 1.3 How do I set up Sentrifugo?

The Super Admin can begin setting up Sentrifugo by using the Configuration Wizard.

### 1.3.1 Configuration Wizard

Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use. Configuration Wizard is the first screen that is displayed if you are logging into the application for the first time.

Information is gathered in 5 steps.

#### Step 1: Modules

Please refer Figure 4.

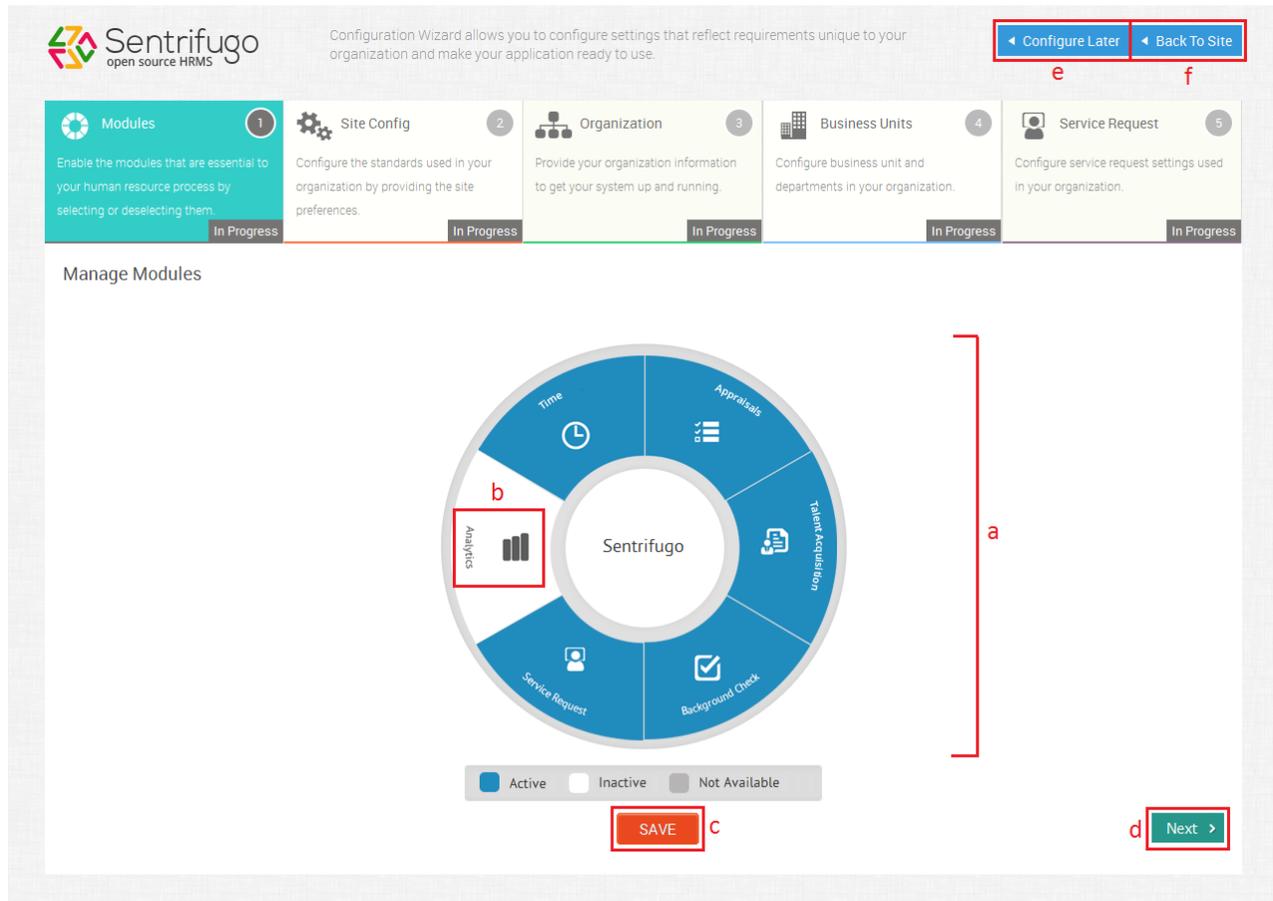
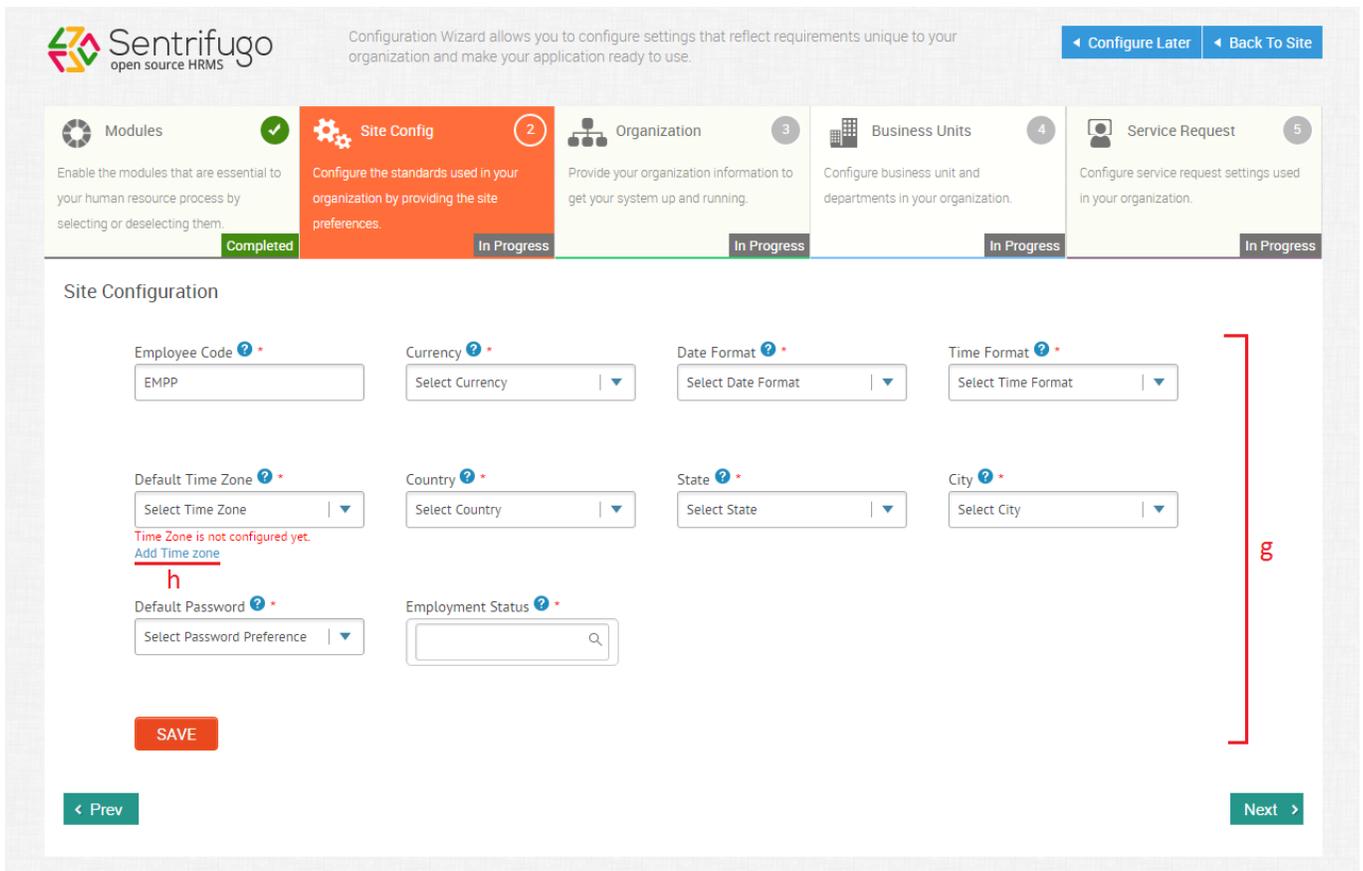


Figure 4

- a. All the modules are displayed in a circular representation
- b. Click on a module icon to activate or inactivate a module
- c. Click **SAVE** button to apply the changes made
- d. Click **Next** button to proceed to the next step
- e. Click **Configure Later** and you will be redirected to the dashboard and you can complete the Configuration as per your convenience
- f. Click **Back To Site** button and you will be redirected to the dashboard. The next time you log in, it will resume from where you had discontinued earlier in the configuration wizard.

## Step 2: Site Config

Please refer Figure 5.



Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use.

[Configure Later](#) | [Back To Site](#)

**Modules** (Completed) | **Site Config** (In Progress) | **Organization** (In Progress) | **Business Units** (In Progress) | **Service Request** (In Progress)

**Site Configuration**

Employee Code: EMPP

Currency: Select Currency

Date Format: Select Date Format

Time Format: Select Time Format

Default Time Zone: Select Time Zone

Country: Select Country

State: Select State

City: Select City

Time Zone is not configured yet.  
[Add Time zone](#)

Default Password: Select Password Preference

Employment Status: [Search]

**SAVE**

[< Prev](#) | [Next >](#)

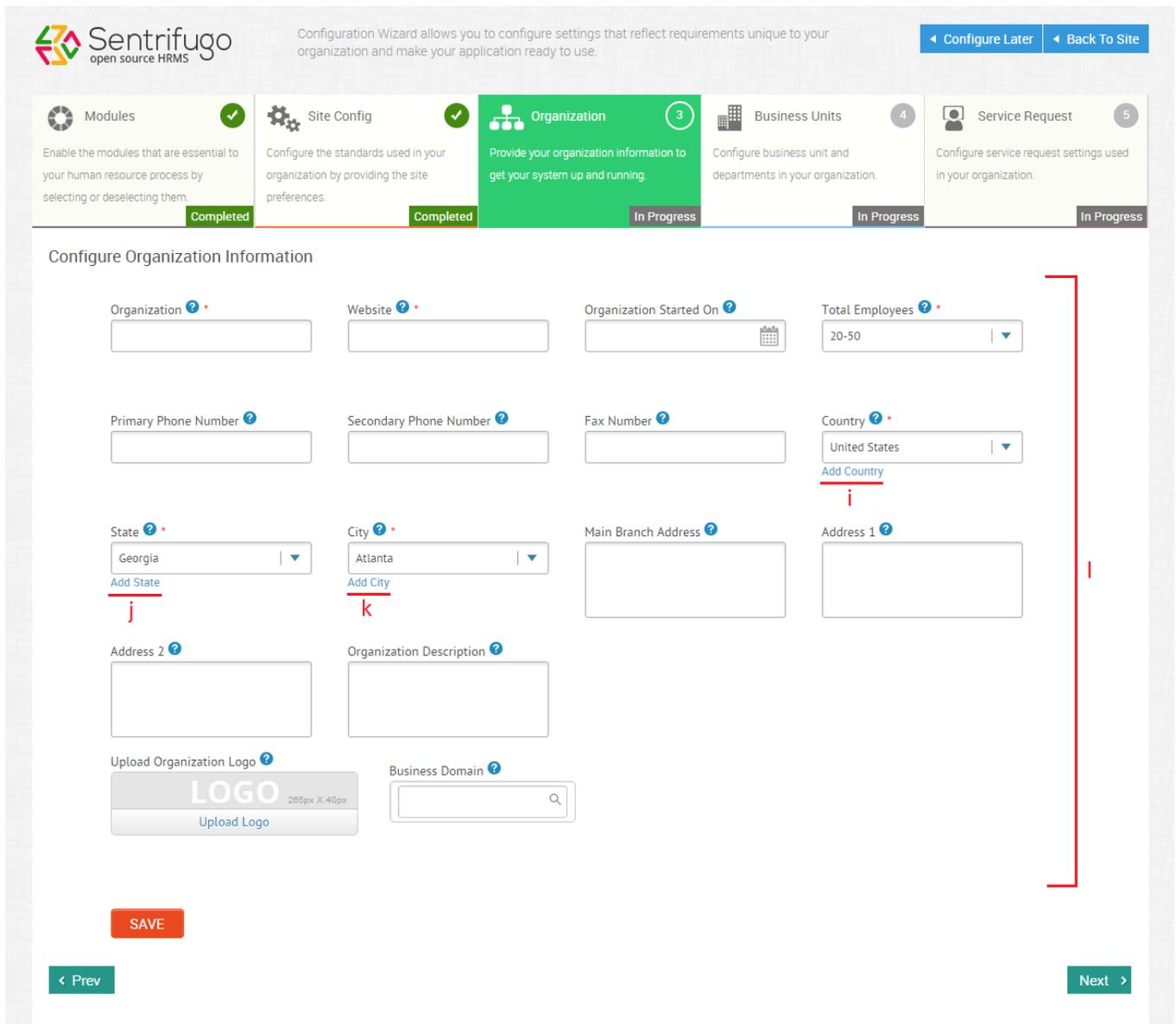
Figure 5

- g. Make changes to the Site Configurations based on your organization preferences
- h. Click **Add Time Zone** to add the required time zone

When you click **Add time Zone** another window will pop up which will let you select the time zone(s) you require in your organization.

### Step 3: Organization

Please refer Figure 6.



Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use.

[Configure Later](#)
[Back To Site](#)

**Modules** Completed | 
 **Site Config** Completed | 
 **Organization** In Progress | 
 **Business Units** In Progress | 
 **Service Request** In Progress

### Configure Organization Information

Organization <sup>?</sup> \*  | 
 Website <sup>?</sup> \*  | 
 Organization Started On <sup>?</sup>  | 
 Total Employees <sup>?</sup> \*

Primary Phone Number <sup>?</sup>  | 
 Secondary Phone Number <sup>?</sup>  | 
 Fax Number <sup>?</sup>  | 
 Country <sup>?</sup> \*

State <sup>?</sup> \*  | 
 City <sup>?</sup> \*  | 
 Main Branch Address <sup>?</sup>  | 
 Address 1 <sup>?</sup>

Address 2 <sup>?</sup>  | 
 Organization Description <sup>?</sup>

Upload Organization Logo <sup>?</sup>  | 
 Business Domain <sup>?</sup>

**SAVE**

[< Prev](#)
[Next >](#)

Figure 6

- i. Click **Add Country** to add the required country
- j. Click **Add State** to add the required state
- k. Click **Add City** to add the required city
- l. Enter information about your organization

After saving your organization's details, an **ADD Employee** button will appear on the top right corner of the configuration wizard screen. However, it is not mandatory to add an employee in this step, you can even add an employee after the entire configuration is completed.

If you want to add an employee please refer to section [1.4 How do I add employees to Sentrifugo?](#)

#### Step 4: Business Units

You can create business units and departments here.

Please refer Figure 7.

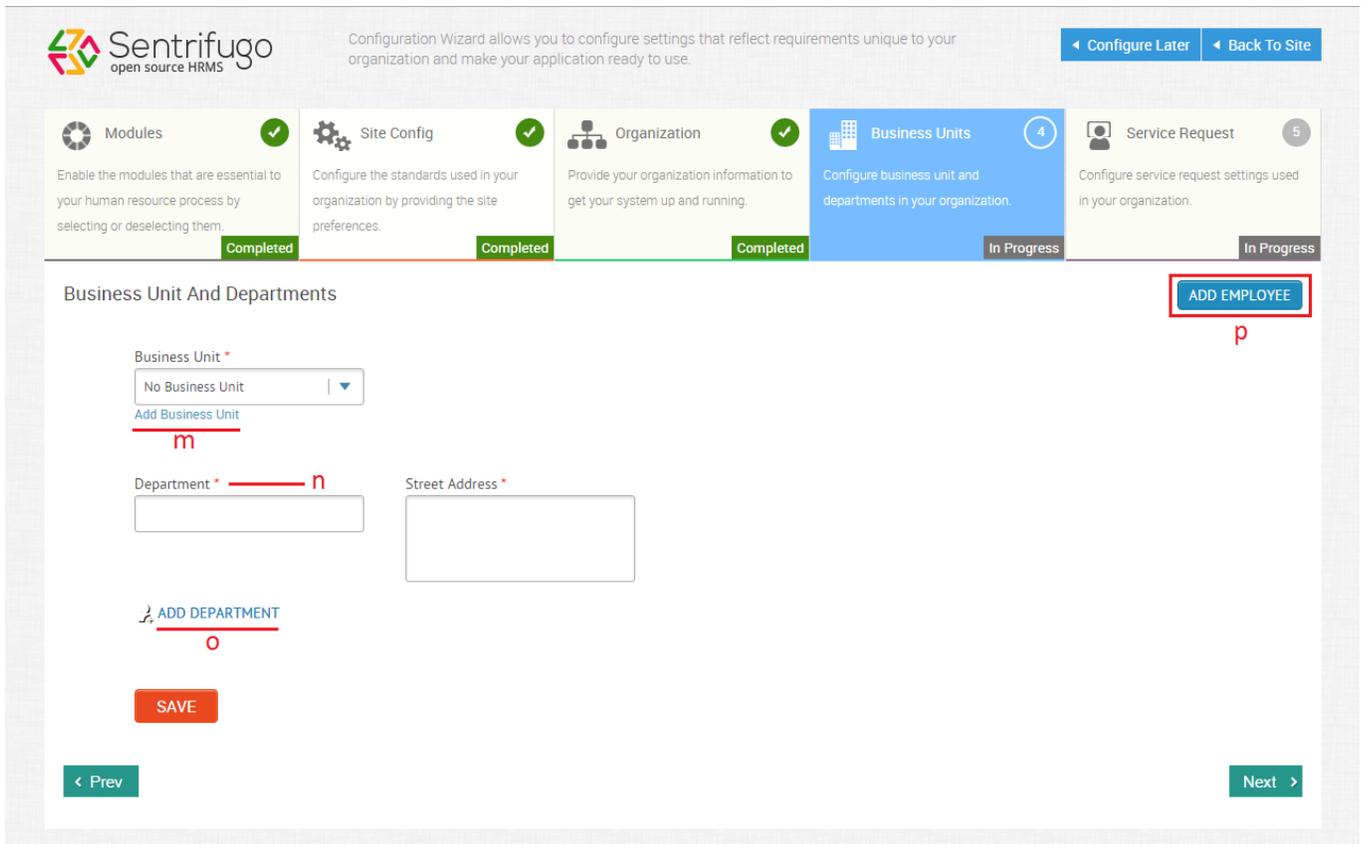


Figure 7

- m. Create a new business unit by giving its name and street address.
- n. Create a new department within the business unit
- o. Add another department (To have multiple departments under a business unit)
- p. Click here to add the first employee (organization head)

## Step 5: Service Request

Please refer Figure 8.

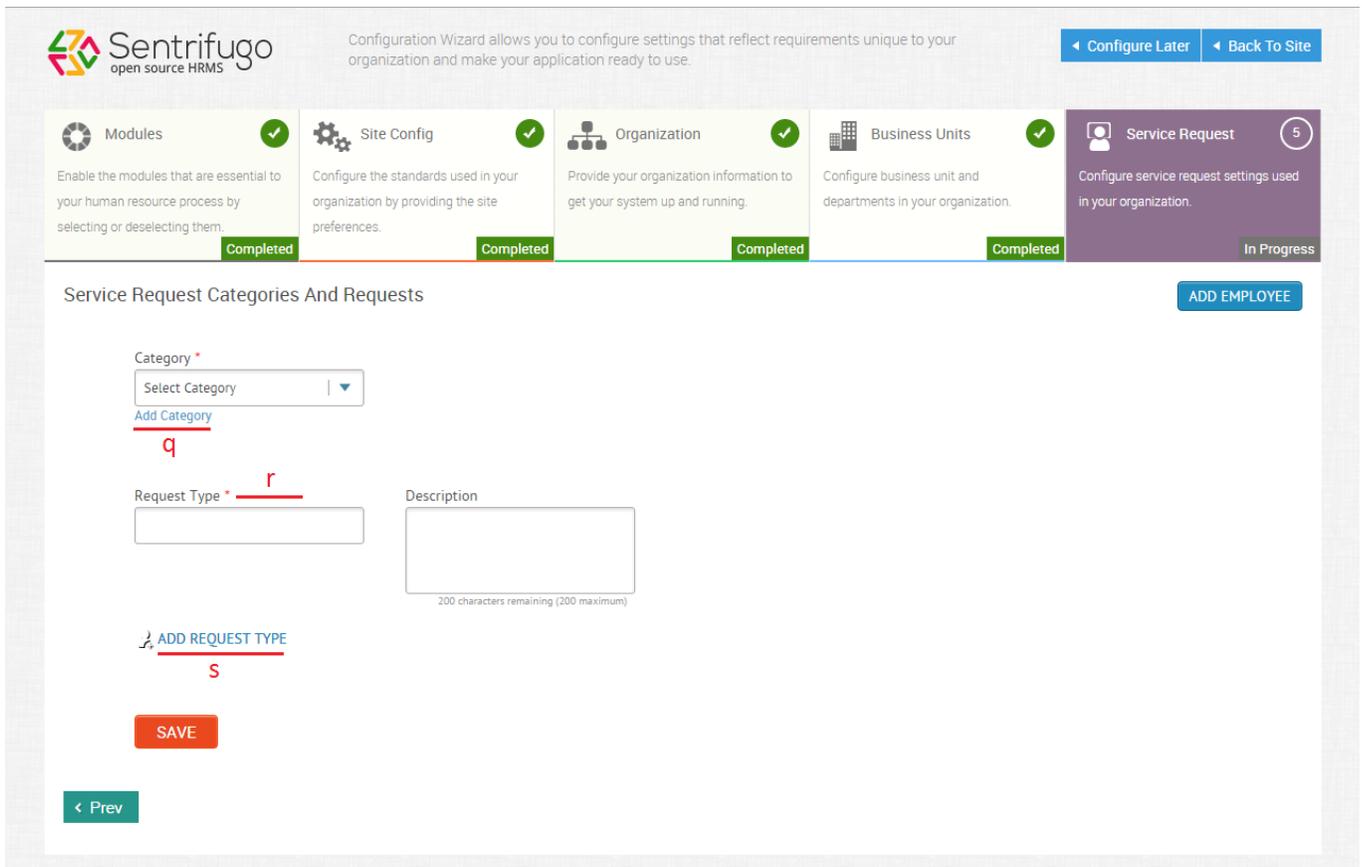


Figure 8

- q. Create a new service category
- r. Create a new request type
- s. Add another request type

Click **Back To site** to go back to the application’s dashboard and exit the configuration wizard.



Ensure that you always **SAVE** after entering details in each section of the Configuration Wizard and only then proceed.

## 1.4 How do I add Employees to Sentrifugo?

Gathering management details is an important aspect of an organization. The first employee you add will be the Organization Head.



You can add other employees only after adding the Organization Head.

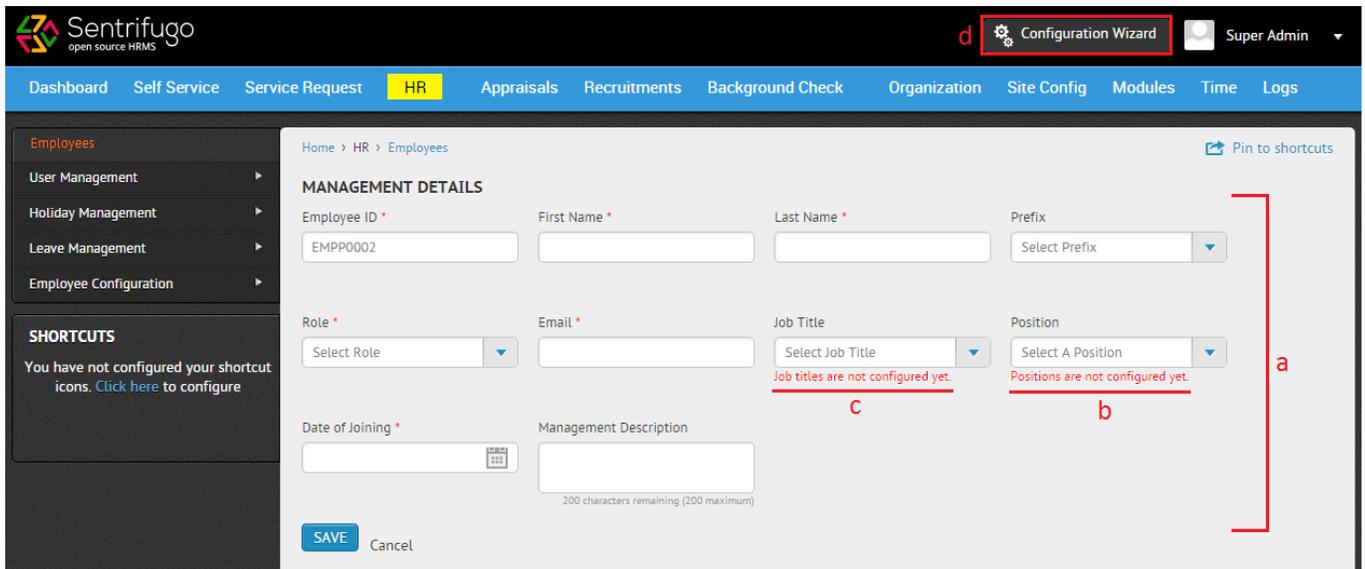


While adding employees ensure that they align with the hierarchy of your organization (top down approach). Reporting manager is a mandatory field, while adding employees.

### 1.4.1 Adding Organization Head (Employee #2)

On clicking **ADD EMPLOYEE** in the configuration wizard screen (refer Figure 8) the below screen will appear:

Please refer Figure 9.



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Site Config', 'Modules', 'Time', and 'Logs'. The 'Configuration Wizard' button is highlighted with a red box labeled 'd'. The main content area is titled 'MANAGEMENT DETAILS' and contains the following fields:

- Employee ID \* (text input, value: EMPP0002)
- First Name \* (text input)
- Last Name \* (text input)
- Prefix (dropdown menu, value: Select Prefix)
- Role \* (dropdown menu, value: Select Role)
- Email \* (text input)
- Job Title (dropdown menu, value: Select Job Title, with error message: Job titles are not configured yet. labeled 'c')
- Position (dropdown menu, value: Select A Position, with error message: Positions are not configured yet. labeled 'b')
- Date of Joining \* (calendar input)
- Management Description (text area, 200 characters remaining)

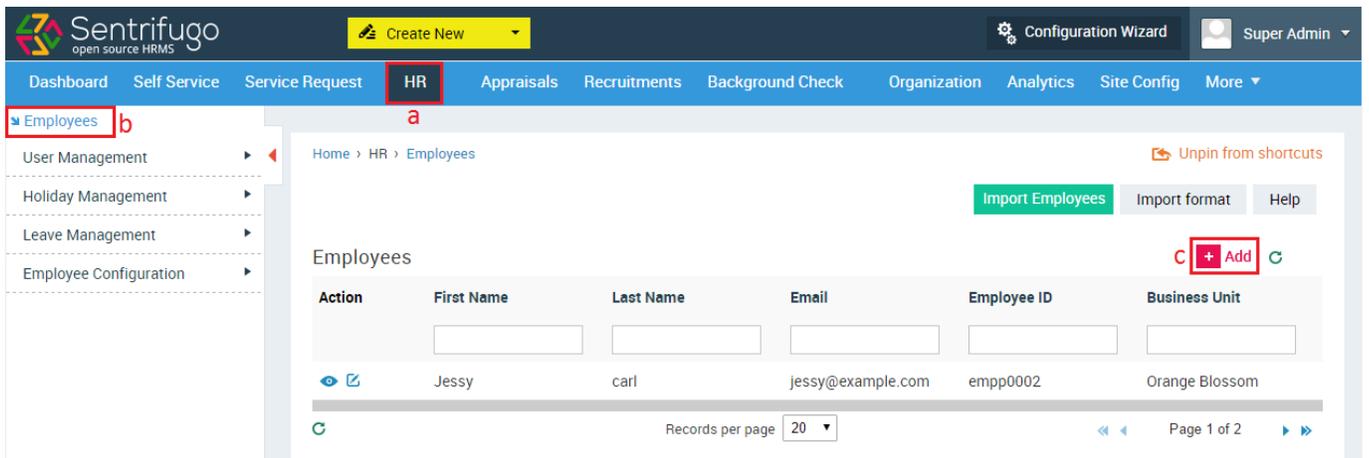
A red bracket labeled 'a' spans the entire form area. A 'SAVE' button and 'Cancel' link are at the bottom left.

Figure 9

- Enter the all the mandatory details
- Position can be configured later
- Job title can be configured later
- Go back to the configuration wizard and resume configuring your application

### 1.4.2 Adding Other Employees

Please refer Figure 10.



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The 'HR' menu item is highlighted with a red box and labeled 'a'. The left sidebar contains 'Employees', 'User Management', 'Holiday Management', 'Leave Management', and 'Employee Configuration'. The 'Employees' menu item is highlighted with a red box and labeled 'b'. The main content area shows the 'Employees' page with a breadcrumb 'Home > HR > Employees'. There are buttons for 'Import Employees', 'Import format', and 'Help'. A '+ Add' button is highlighted with a red box and labeled 'c'. Below the buttons is a table with columns: Action, First Name, Last Name, Email, Employee ID, and Business Unit. The table contains one row with the following data: Action (eye icon), First Name (Jessy), Last Name (carl), Email (jessy@example.com), Employee ID (empp0002), and Business Unit (Orange Blossom). At the bottom, there is a 'Records per page' dropdown set to 20 and 'Page 1 of 2'.

Figure 10

- a. Click **HR** in the top menu
- b. Click **Employees** option on the left panel
- c. Click **+Add** button on the right side

*Please refer Figure 11.*

Home › HR › Employees › Add

**Official**

Documents

Leaves

Holidays

Salary

Personal

Contact

Skills

Job History

Experience

Education

Training & Certification

Medical Claims

Disability

Dependency

Visa and Immigration

Corporate Card

Work Eligibility

Additional Details

Employee Code \*  
empp  
Configure Identity Codes

d

Employee Id \*

Prefix  
Select Prefix ▼  
Add Prefix

First Name \*

Last Name \*

Mode of Employment \*  
Direct ▼

Role \*  
Select Role ▼

Email \*

Business Unit  
No Business Unit ▼

Department ? \*  
Select Department ▼

Reporting Manager \*  
Select Reporting Manager ▼

Job Title  
Select Job Title ▼  
Add Job Title

Position ?  
Select Position ▼  
Add Position

Employment Status \*  
Select Employment Status ▼  
Add Employment Status

Date of Joining ? \*

Date of Leaving ?

Years of Experience

Work Telephone Number

Extension

Fax

f

Save

Cancel

e

Figure 11

- d. The letters in the employee code (configured in Site Config step) will appear by default. You will need to enter the Employee ID manually.
- e. Enter the required details related to the employee
- f. Click **Save** button to add the employee



Only the Super Admin's ID number will be fixed as 0001. All the other Employees including the Organization Head can have customized employee ID numbers. For example:

Super Admin: EMP0001  
 Organization Head: EMP0022  
 Manager: EMP345  
 Employee: EMP90

### 1.4.3 Adding Employees in Bulk

Employees can be added in bulk using the import option. You have to download the import format excel doc, fill it in with all the employees' details and then import it.

Please refer Figure 12.

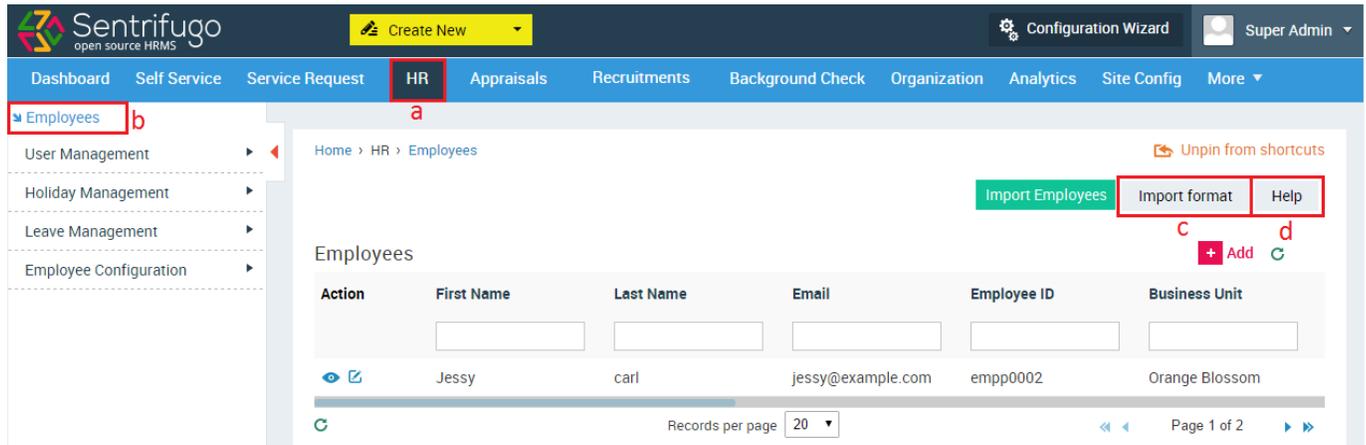


Figure 12

- Click **HR** in the top menu
- Click **Employees** option on the left panel
- Click **Import Format** on the right side above the Employees grid to download the format
- For further guidance, click on the **Help** link. You will be directed to the import guide, which will provide you detailed information on how to add employee in bulk.

Please refer Figure 13 to view the Import Format.

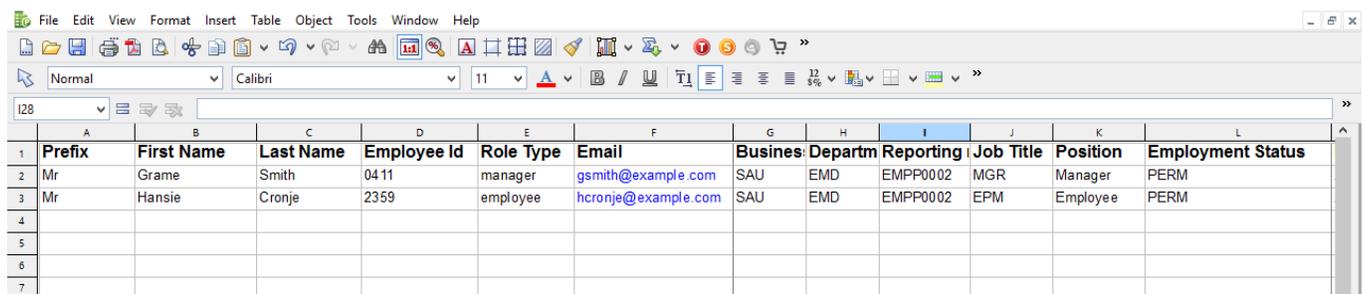


Figure 13

In bulk import, emails containing the credentials will not be sent automatically to the employees. The employee data will only be saved in the database. In order to send emails, you will need to run the cron job:

[http://..\(your domain name\)..../index.php/cronjob](http://..(your domain name)..../index.php/cronjob)

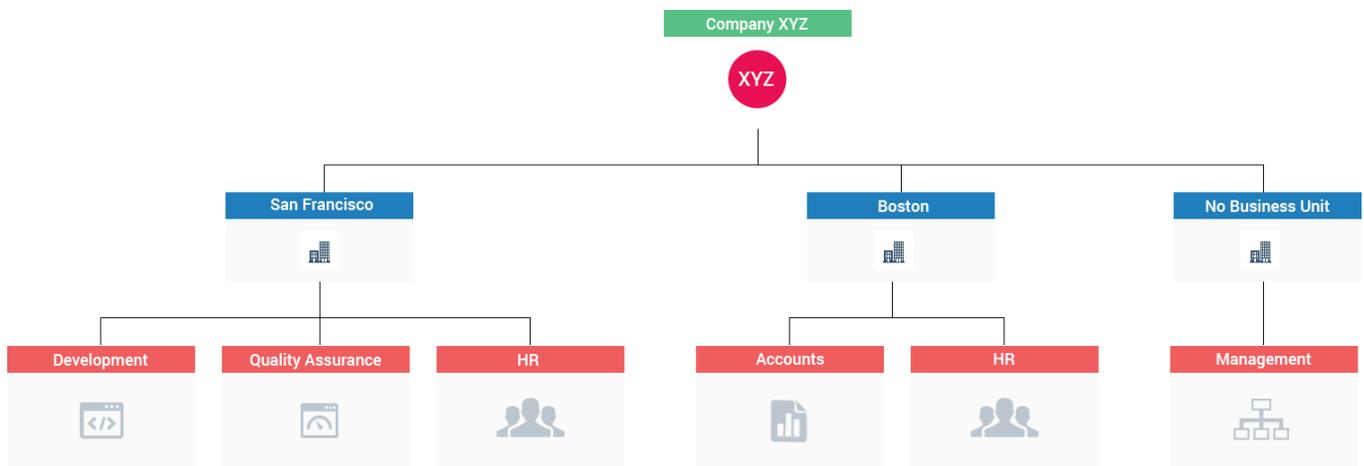
For example: <http://example.com/sentrifugo/index.php/cronjob>



Please logout of the application and then run the cron job in your browser.

## 1.5 How do I add Business Units and Departments (without using configuration wizard)?

Business Units and Departments are the two main organizational units of Sentrifugo. A Business Unit can have multiple departments and not vice versa. Below is an example of the Organization Structure in Sentrifugo.



### 1.5.1 Adding Business Units

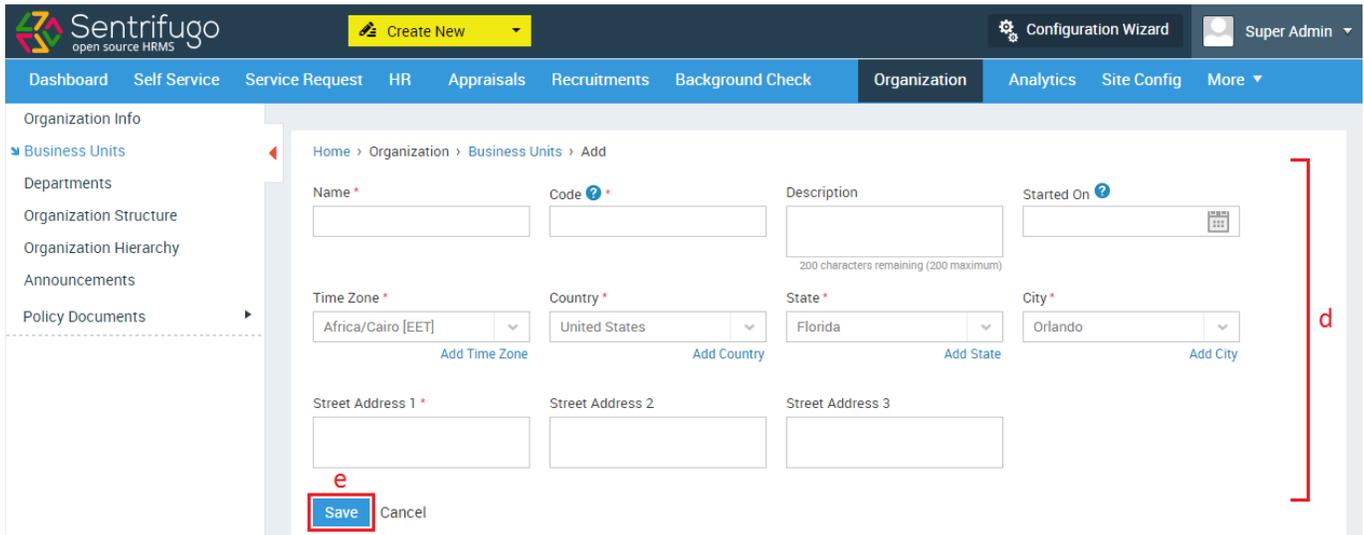
Please refer Figure 14.

Action	Name	Code	Started On	Street Address	City	State	Country	Time zone
	Orange Blossom	ORB	2011-Aug-16	Bakes man street	Atlanta	Georgia	United States	Africa/Cairo [EET]
	Avenue	AVE	2014-Aug-13	Brooklyn street	Orlando	Florida	United States	Africa/Accra [GMT]

Figure 14

- a. Click **Organization** in the top menu
- b. Click on **Business Units** on the left panel
- c. Click on **+Add** button on the right side

Please refer Figure 15.



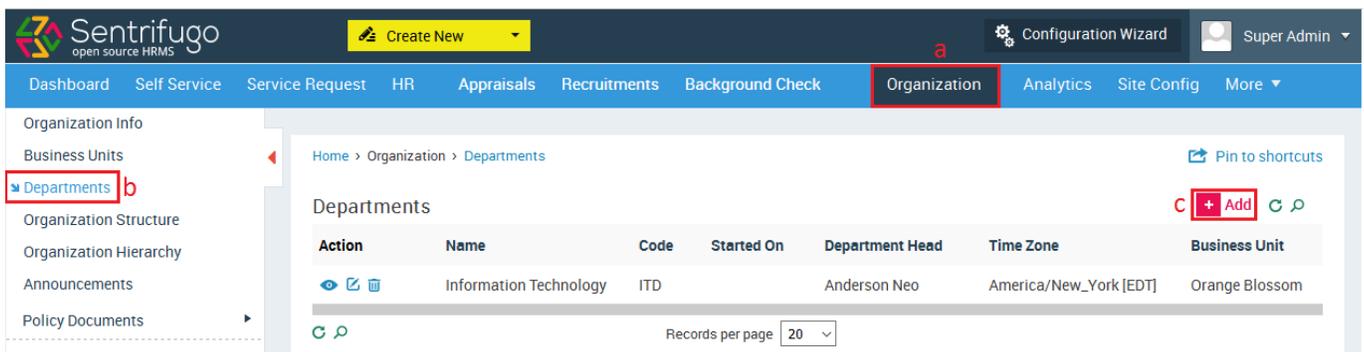
The screenshot shows the 'Add Business Unit' form in the Sentrifugo application. The form is titled 'Home > Organization > Business Units > Add'. It contains several input fields: 'Name \*', 'Code \*', 'Description' (with a 200-character limit), 'Started On \*', 'Time Zone \*' (set to Africa/Cairo [EET]), 'Country \*' (set to United States), 'State \*' (set to Florida), and 'City \*' (set to Orlando). There are also three 'Street Address' fields. At the bottom left, there is a 'Save' button (labeled 'e') and a 'Cancel' button. A red bracket on the right side of the form is labeled 'd'.

Figure 15

- d. Enter the necessary details
- e. Click on Save button to save the Business Unit

## 1.5.2 Adding Departments

Please refer Figure 16.



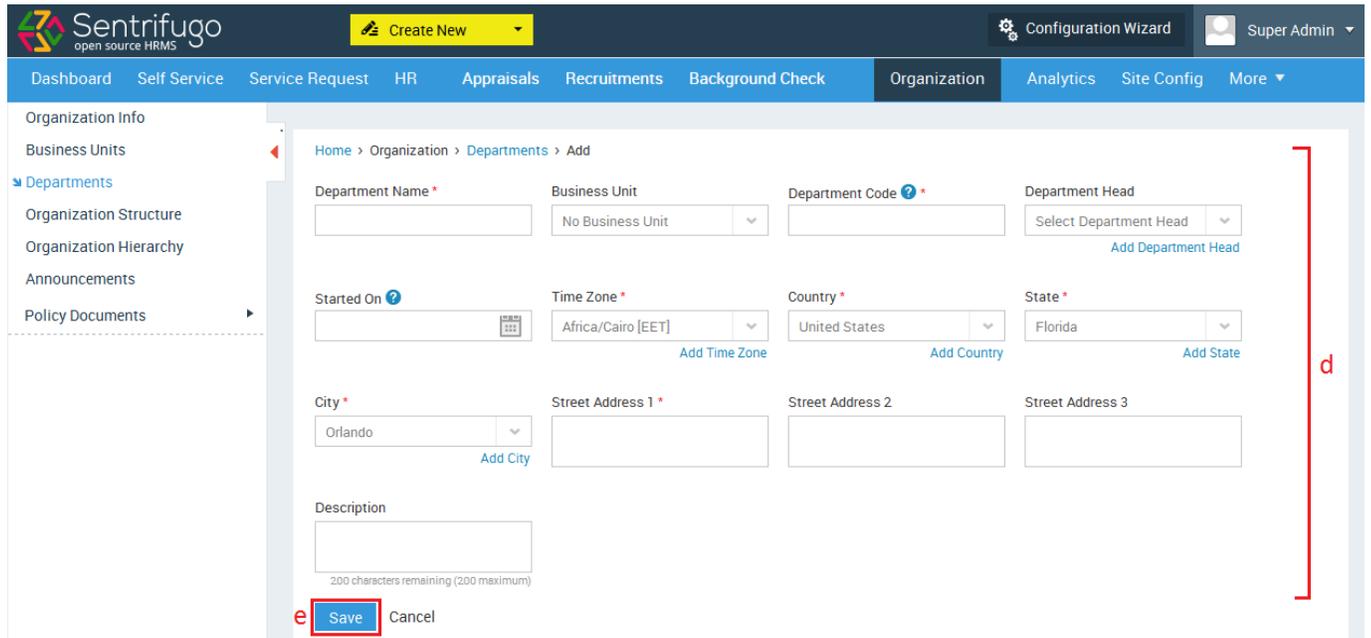
The screenshot shows the 'Departments' list in the Sentrifugo application. The 'Organization' menu item is highlighted (labeled 'a'). In the left sidebar, 'Departments' is selected (labeled 'b'). The main content area shows a table with one department: 'Information Technology' (code ITD, started on Anderson Neo, time zone America/New\_York [EDT], business unit Orange Blossom). There is an '+ Add' button (labeled 'c') in the top right corner of the table area. The 'Records per page' is set to 20.

Action	Name	Code	Started On	Department Head	Time Zone	Business Unit
  	Information Technology	ITD		Anderson Neo	America/New_York [EDT]	Orange Blossom

Figure 16

- a. Click **Organization** in the top menu
- b. Click on **Departments** on the left menu panel
- c. Click on **+Add** button on the right side

Please refer Figure 17.



Home > Organization > Departments > Add

Department Name \*

Business Unit

Department Code ? \*

Department Head

[Add Department Head](#)

Started On ?

Time Zone \*

[Add Time Zone](#)

Country \*

[Add Country](#)

State \*

[Add State](#)

City \*

[Add City](#)

Street Address 1 \*

Street Address 2

Street Address 3

Description

200 characters remaining (200 maximum)

**e**

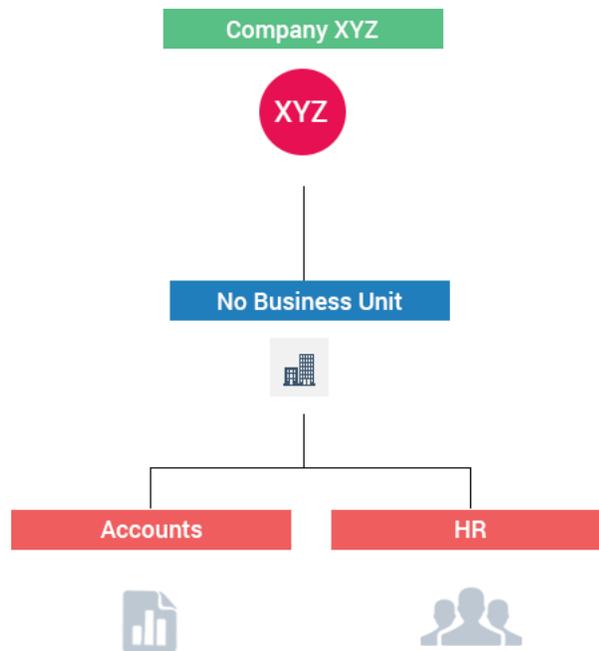
**d**

Figure 17

- d. Enter the necessary details
- e. Click **Save** button to create a new department

### 1.5.3 No Business Unit

If you need only Departments and no Business Units, then you can go for the option 'No Business Unit'. While creating a Department (refer [1.5.2 Adding Departments](#)) select the option 'No Business Unit' in the Business Unit field.



Please refer Figure 18.

The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar lists 'Organization Info', 'Business Units', 'Departments', 'Organization Structure', 'Organization Hierarchy', 'Announcements', and 'Policy Documents'. The main content area is titled 'Home > Organization > Departments > Add'. The form includes fields for 'Department Name', 'Business Unit' (with a red box around the 'No Business Unit' option), 'Department Code', 'Department Head', 'Started On', 'Time Zone', 'Country', 'State', 'City', 'Street Address 1', 'Street Address 2', 'Street Address 3', and 'Description'. There are 'Save' and 'Cancel' buttons at the bottom.

Figure 18

a. Select the option 'No Business Unit'

## 1.6 How do I add Job Titles and Positions?

Job title is an employee's designation and Position is the designation level. For example if the Job title is Software Engineer, then the Position can be Senior Software Engineer or Associate Software Engineer.

## 1.6.1 Adding Job Titles

Please refer Figure 19.

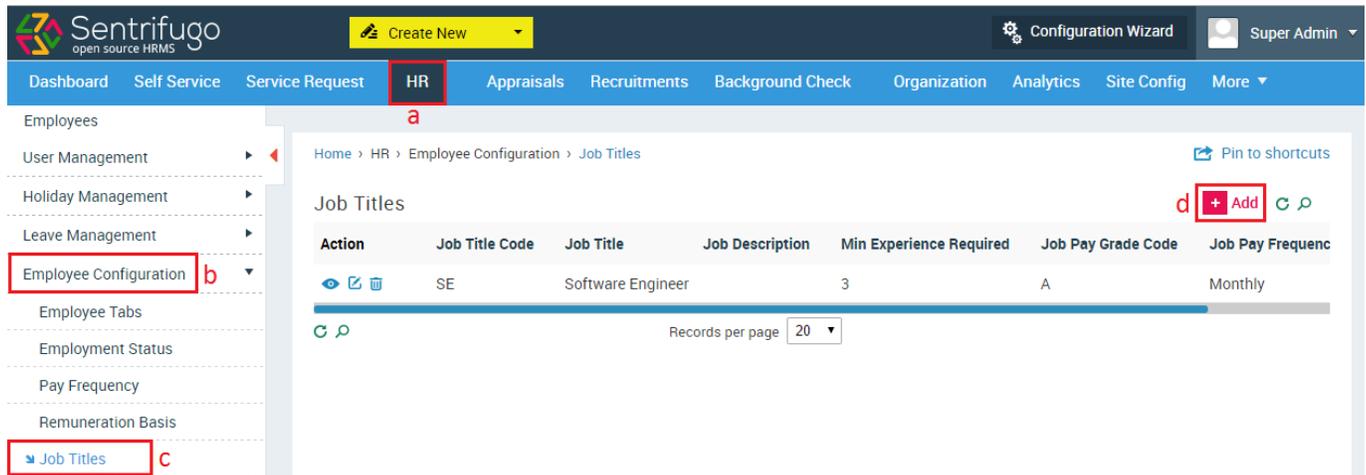


Figure 19

- Click **HR** in the top menu
- Click **Employee Configuration**, it will expand to give more menu items
- Click **Job Titles**
- Click **+Add** button on the right side

Please refer Figure 20.

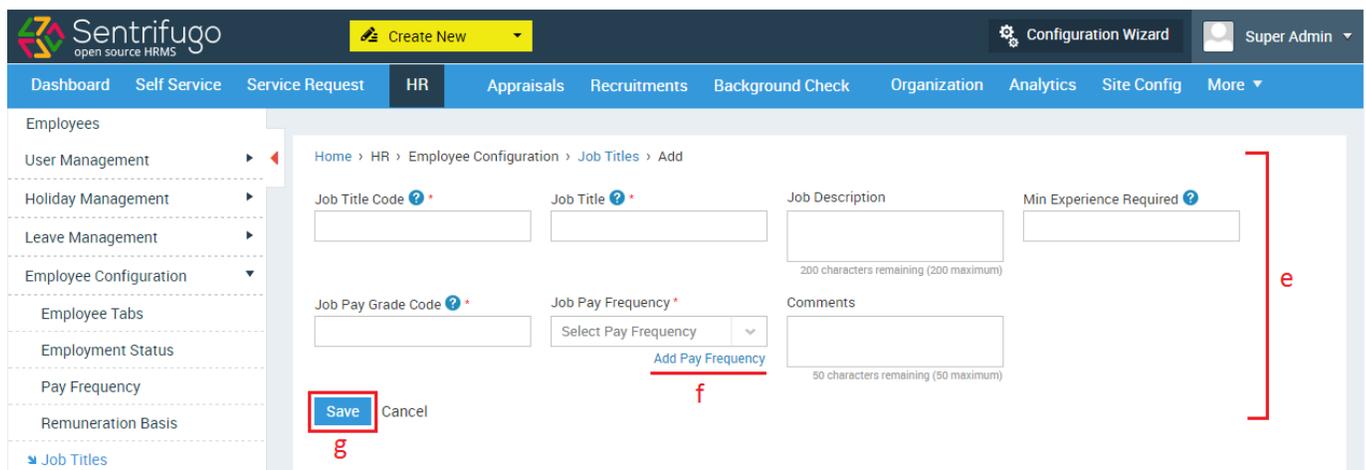


Figure 20

- Fill in the required details
- Click **Add Pay Frequency** to add different frequency categories like Monthly, Daily etc.
- Click **Save** button to create a new job title

## 1.6.2 Adding Positions

Please refer Figure 21.

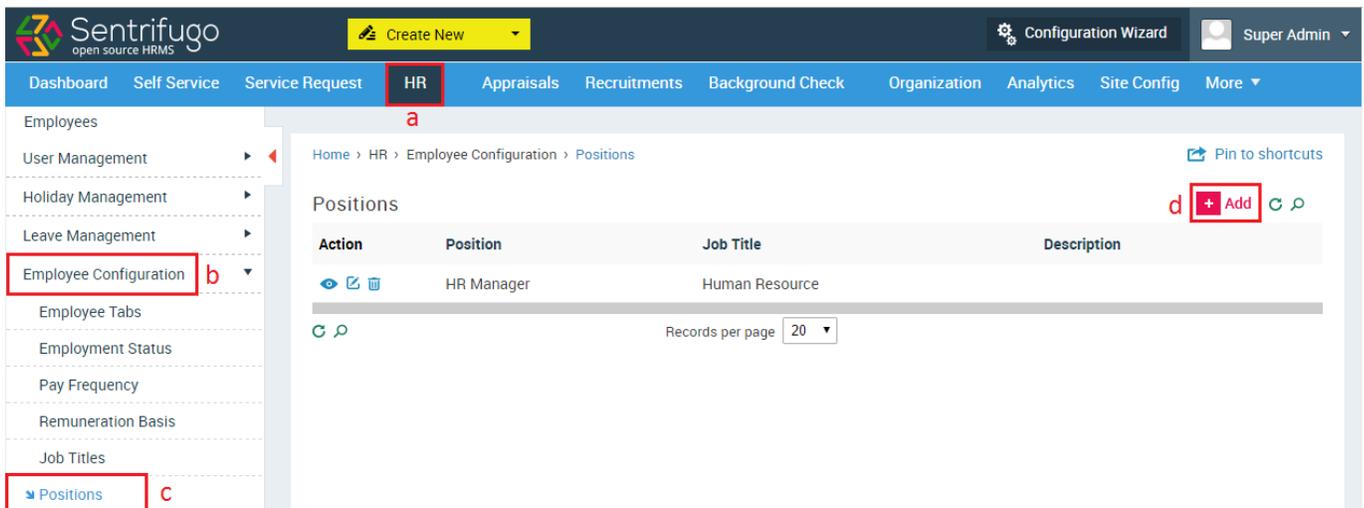


Figure 21

- a. Click **HR** in the top menu
- b. Click **Employee Configuration**, it will expand to give more menu items
- c. Click **Positions** in the submenu
- d. Click **+Add** button on the right side

Please refer Figure 22.

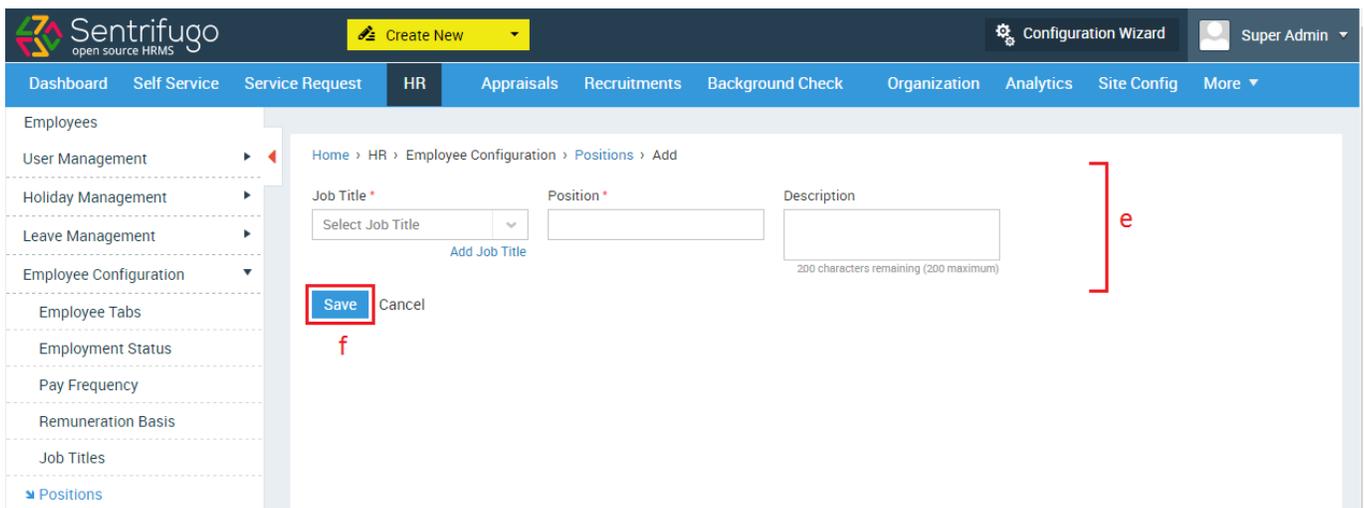


Figure 22

- e. Fill in the required details
- f. Click **SAVE** to successfully create a position.



You can create a Position only after creating a Job Title

## 2. Dashboard

Sentrifugo's dashboard enables you to have all the information you need at a glance. You can decide what elements you need on the dashboard by configuring widgets. You can also view announcements and your colleagues' upcoming birthday.

### 2.1 How do I add Widgets?

Please refer Figure 23.

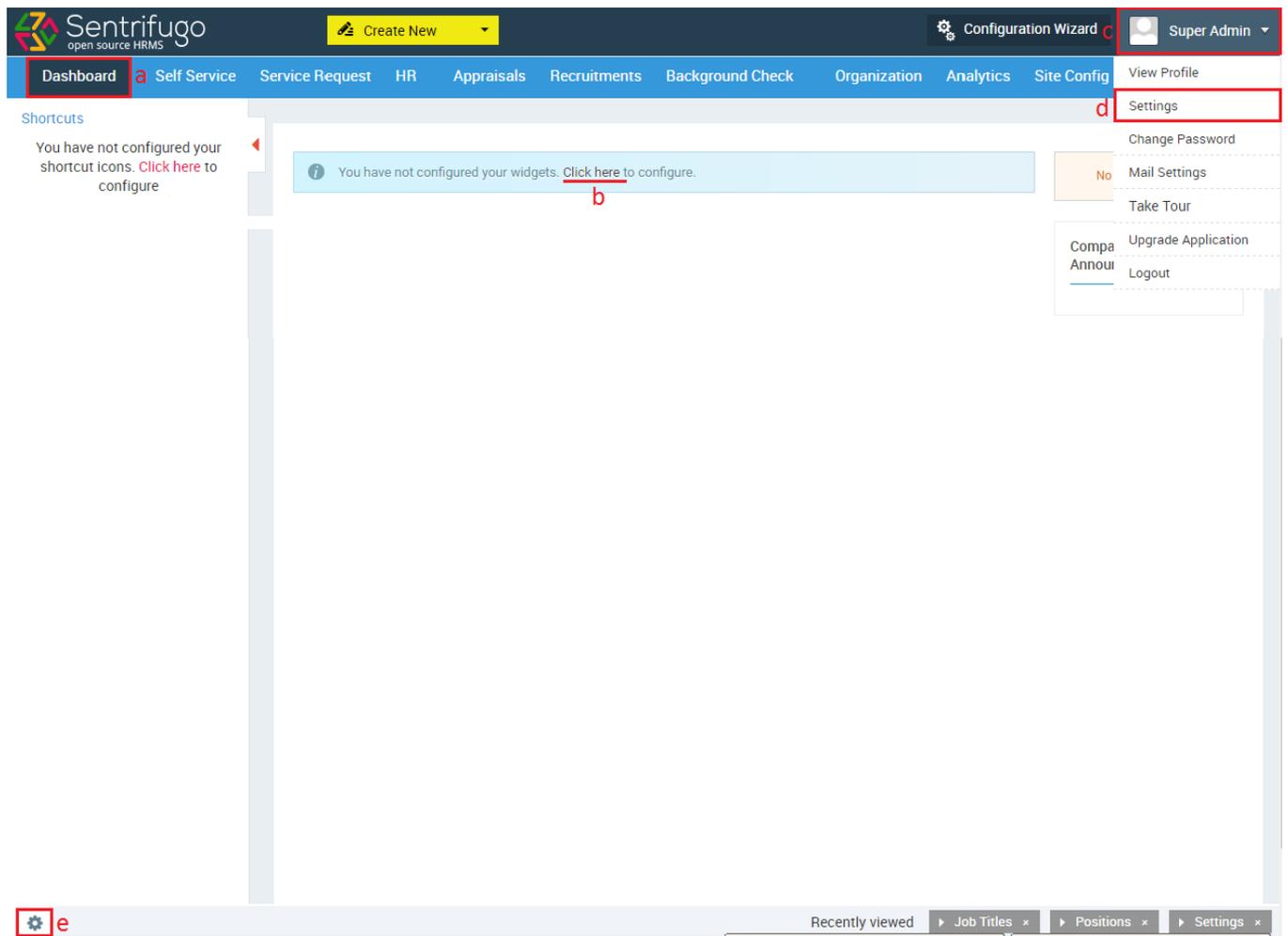


Figure 23

You can configure your widgets on your dashboard using the below methods:

- a. Click the organization logo on the top left corner (This will take you to the dashboard from any other screen)
- b. Click **Click here** link at the center of the dashboard

Or

- c. Click the **logged in user's name** in the top right corner
- d. Click **Settings** in the dropdown

Or

- e. Click the **gear icon** in the bottom left corner

Please refer Figure 24.

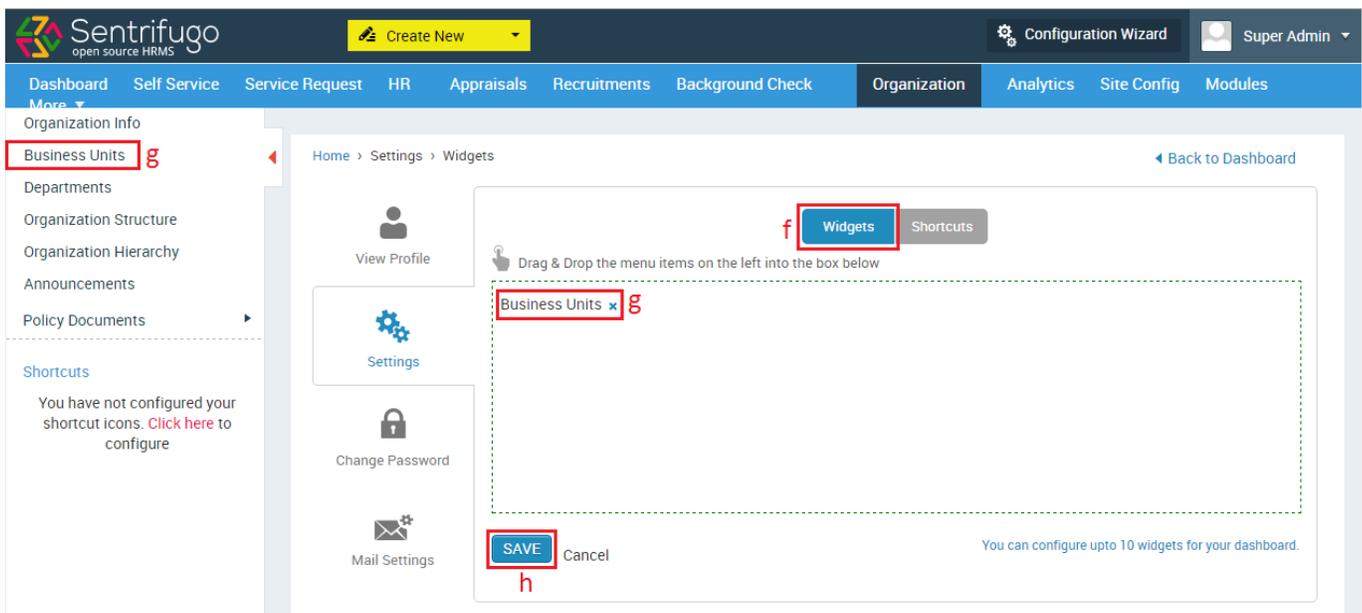


Figure 24

(Common for all)

- f. Click **Widgets** button in the settings page
- g. Drag and drop the selected menu item(s) in the widgets box
- h. Click **SAVE** button to add Widgets in the Widgets pane

## 2.2 How do I add Shortcuts?

Please refer Figure 25.

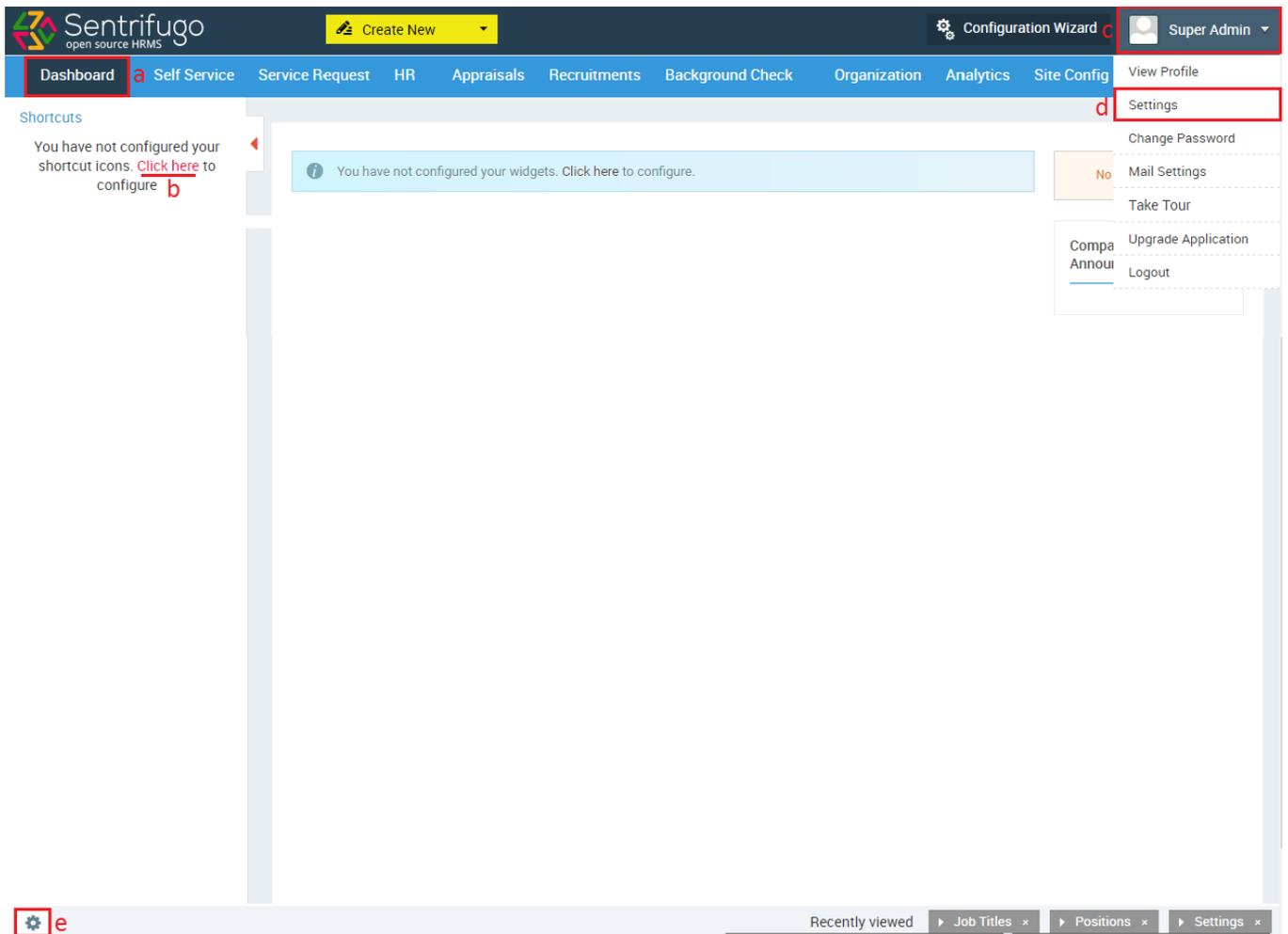


Figure 25

You can configure your shortcuts on your dashboard using the below methods:

- a. Click the organization logo on the top left corner (This will take you to the dashboard from any other screen)
- b. Click **Click here** link at the center of the dashboard

**Or**

- c. Click the **logged in user's name** in the top right corner
- d. Click **Settings** in the dropdown

**Or**

- e. Click the **gear icon** in the bottom left corner

Please refer Figure 26.

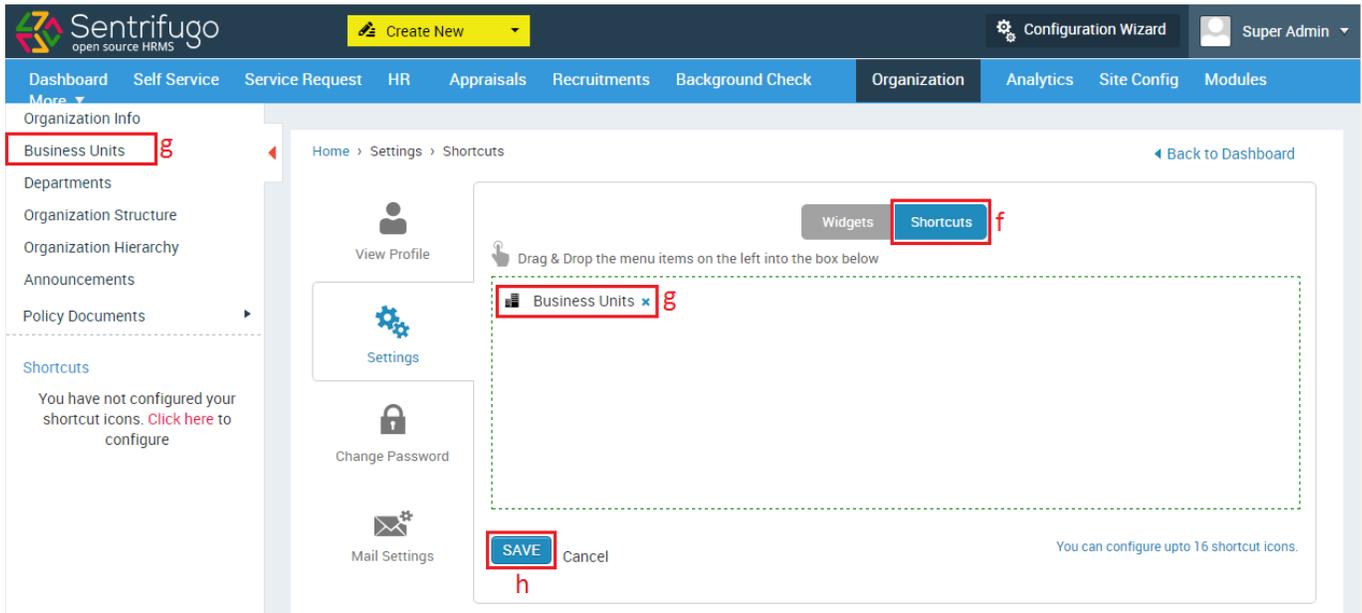


Figure 26

**(Common for all)**

- f. Click **Shortcuts** button in the settings page
- g. Drag and drop the selected menu item(s) in the widgets box
- h. Click **SAVE** button to add Shortcuts in the Shortcuts pane

This is how your widgets and shortcuts will appear on the dashboard after you've saved them Check the image below:

Sentrifugo open source HRMS Create New Configuration Wizard Super Admin

Dashboard Self Service Service Request HR Appraisals Recruitments Background Check Organization Analytics Site Config More

Shortcuts

- 4 Openings/Positions (Approved: 1, Rejected: 1) [View](#)
- 2 Screening Types [View All](#)
- 2 Agencies [View All](#)
- 1 Approved Requisitions [View All](#)
- 1 Manager Appraisal [View](#)
- 7 Roles & Privileges (Employees: 2, HR: 1, Management: 1, External Users: 1, Manager: 1) [View All](#)
- 1 Manage Holiday Group (New Group: 1) [View All](#)
- 1 Manage Holidays (20.09.2016 (Diwali)) [View All](#)
- 4 Categories (System Administration, Accounts, Software, Hardware) [View All](#)
- 5 Appraisal Questions (What is Validation?, What is Verification?, What is Walkthrough?, What is Agile Model?, What is Inspection?) [View All](#)

No birthdays today.

Company Announcements  
Announcements Sat, Sep 17

© Sentrifugo, 2016 Powered By Sapplica

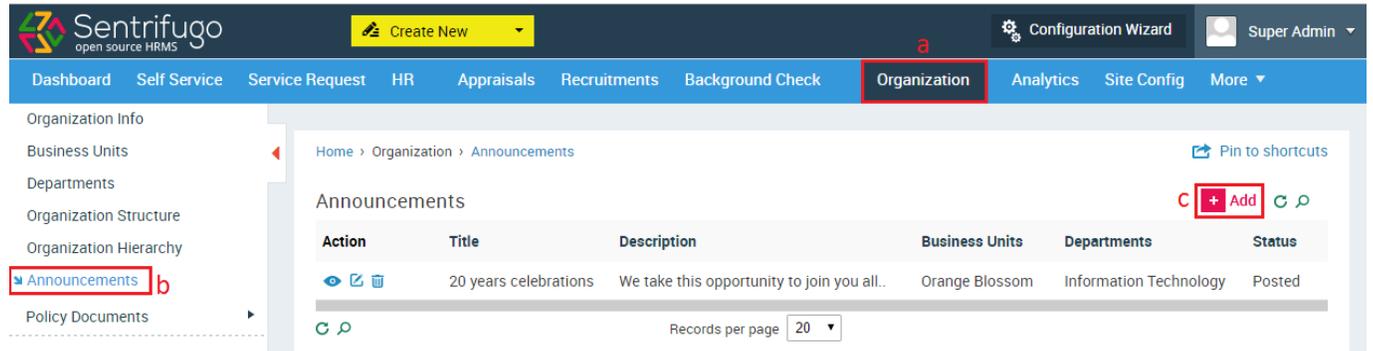


Click **cancel** to exit the Widgets/Shortcuts screen

## 2.3 How do I add Announcements?

**Announcements** can be created by the Super Admin, Management & HR. The announcements will appear on every user's dashboard.

Please refer Figure 27



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization' (highlighted with a red box), 'Analytics', 'Site Config', and 'More'. The left sidebar lists 'Organization Info', 'Business Units', 'Departments', 'Organization Structure', 'Organization Hierarchy', 'Announcements' (highlighted with a red box and labeled 'b'), and 'Policy Documents'. The main content area shows the 'Announcements' page with a breadcrumb 'Home > Organization > Announcements'. A table lists an announcement with columns for Action, Title, Description, Business Units, Departments, and Status. The '+ Add' button is highlighted with a red box and labeled 'c'. The table contains one row: '20 years celebrations', 'We take this opportunity to join you all..', 'Orange Blossom', 'Information Technology', 'Posted'. Below the table is a 'Records per page' dropdown set to '20'.

Figure 27

- a. Click **Organization** in the top menu
- b. Click **Announcements** on the left menu panel
- c. Click **+Add** button on the right side

Please refer Figure 28.

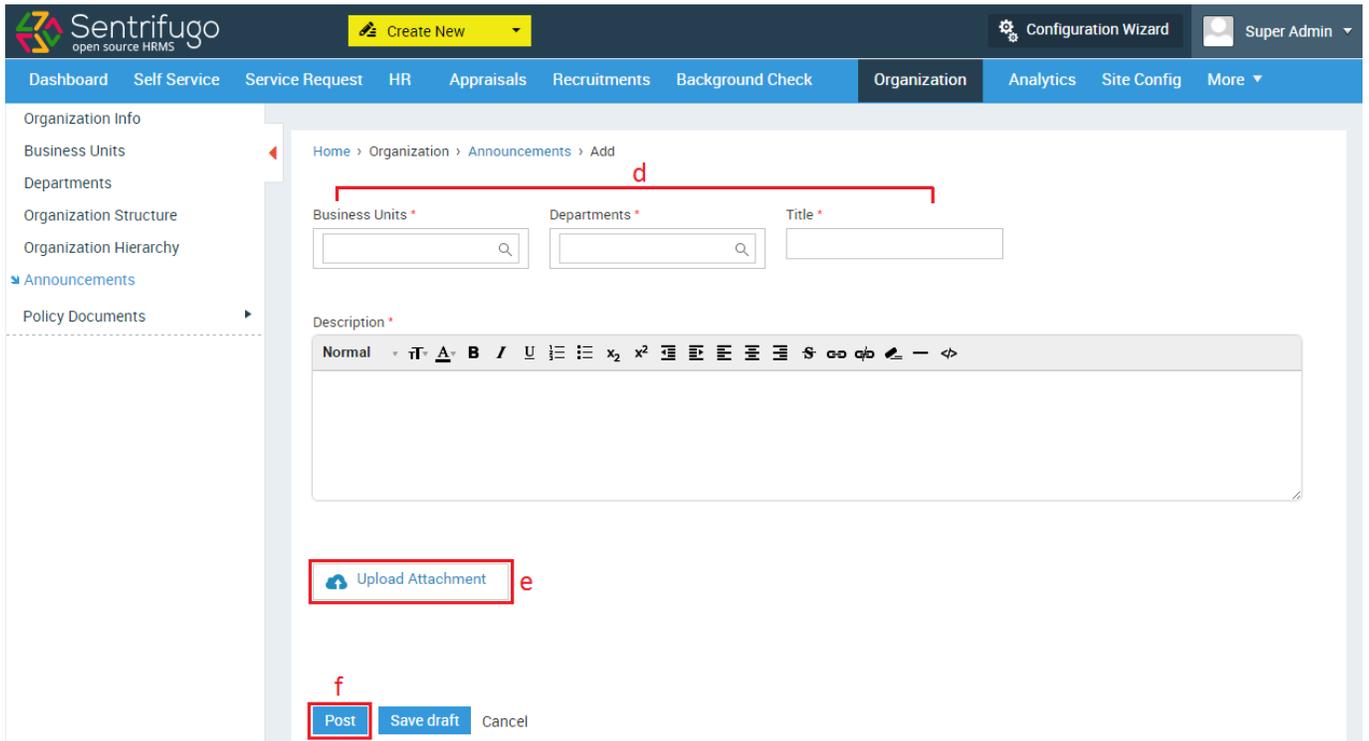


Figure 28

- d. Select the Business Unit(s), Department and Title
- e. Upload Attachment if required
- f. Click **Post** button to publish the announcements

## 2.4 How do I add Birthday Announcements?

Birthday updates will be displayed if it's any employee's birthday on that particular date.

Please refer Figure 29.

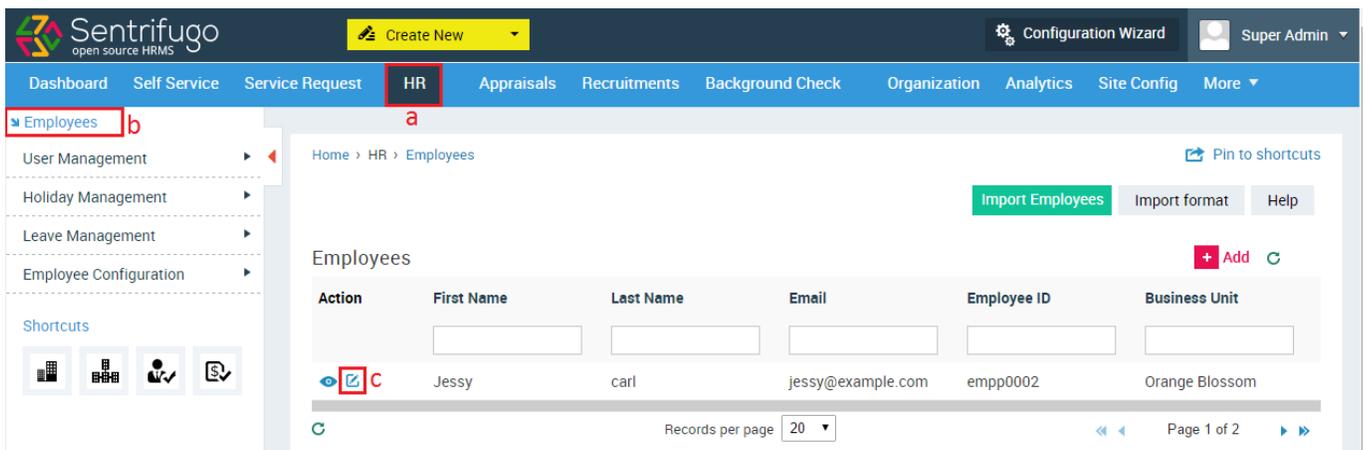
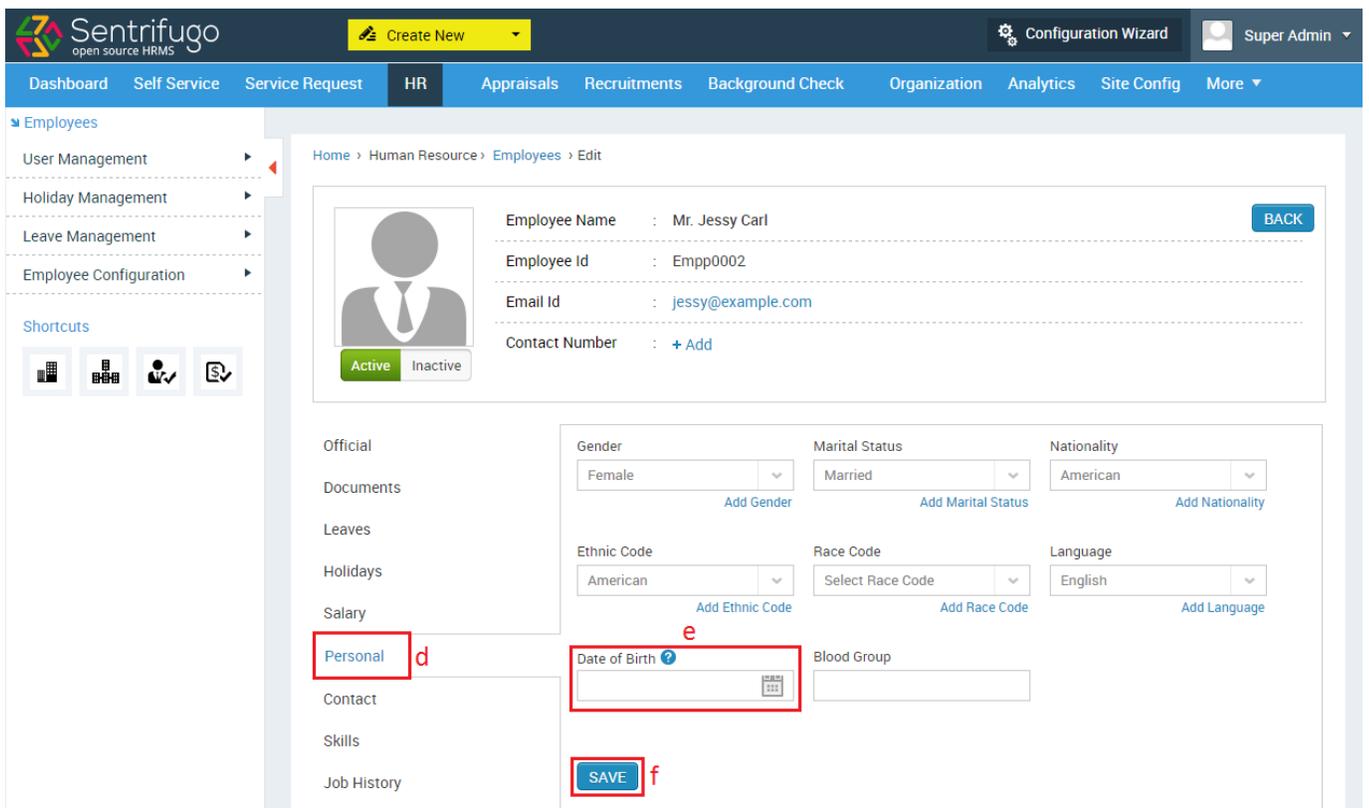


Figure 29

To add an employee's birthday:

- a. Click **HR** in the top menu
- b. Click **Employees** on the left menu panel
- c. Click **Edit** icon against any employee's name

Please refer Figure 30.



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar shows 'Employees' with sub-items: 'User Management', 'Holiday Management', 'Leave Management', and 'Employee Configuration'. Below these are 'Shortcuts' with icons for various HR functions. The main content area is titled 'Home > Human Resource > Employees > Edit'. It displays employee details for 'Mr. Jessie Carl' (Employee Id: Empp0002, Email Id: jessy@example.com). Below this is a form with several sections: 'Official Documents', 'Leaves', 'Salary', 'Personal', 'Contact', 'Skills', and 'Job History'. The 'Personal' section is highlighted with a red box and labeled 'd'. It contains fields for 'Gender' (Female), 'Marital Status' (Married), 'Nationality' (American), 'Ethnic Code' (American), 'Race Code' (Select Race Code), 'Language' (English), 'Date of Birth' (highlighted with a red box and labeled 'e'), and 'Blood Group'. A 'SAVE' button is highlighted with a red box and labeled 'f'.

Figure 30

- d. Click **Personal** menu option on the left menu panel (left side of the form)
- e. Enter the birth date in the 'Date of Birth' field
- f. Click **SAVE** button

Once the birth dates of employees have been added, a birthday announcement will be displayed on their birthdays.

Please refer Figure 31.

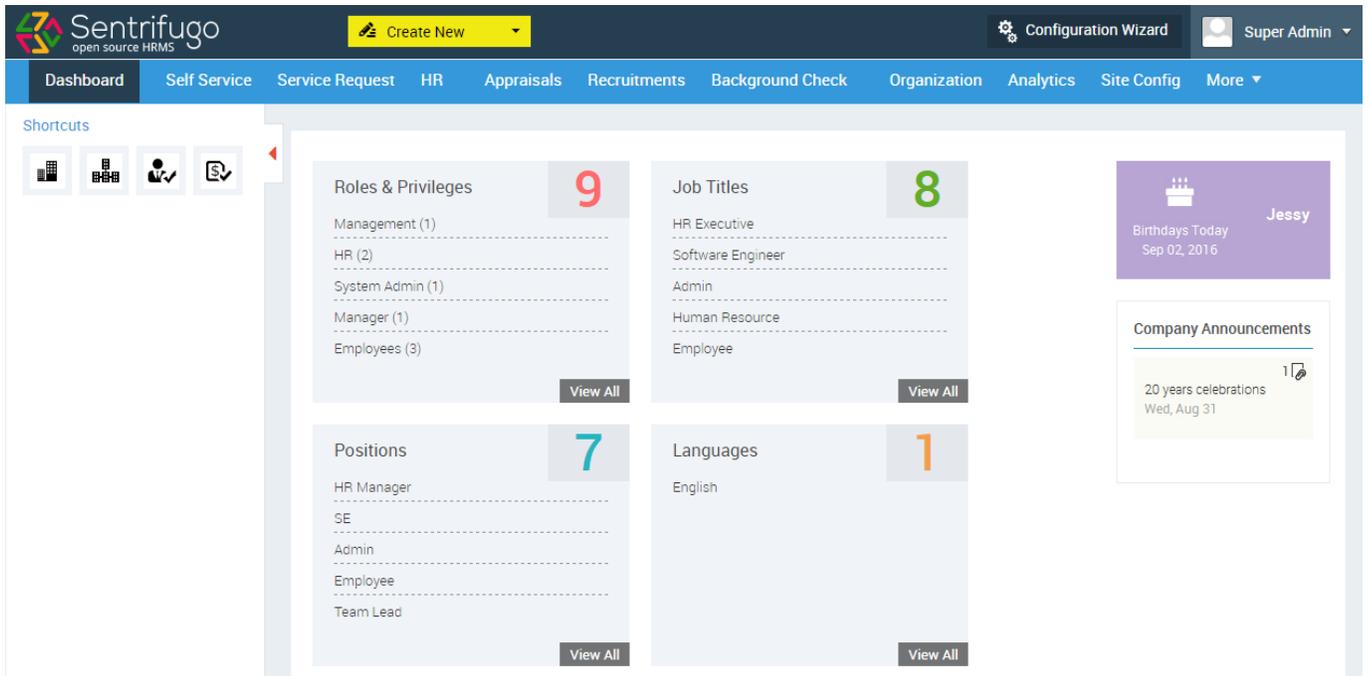


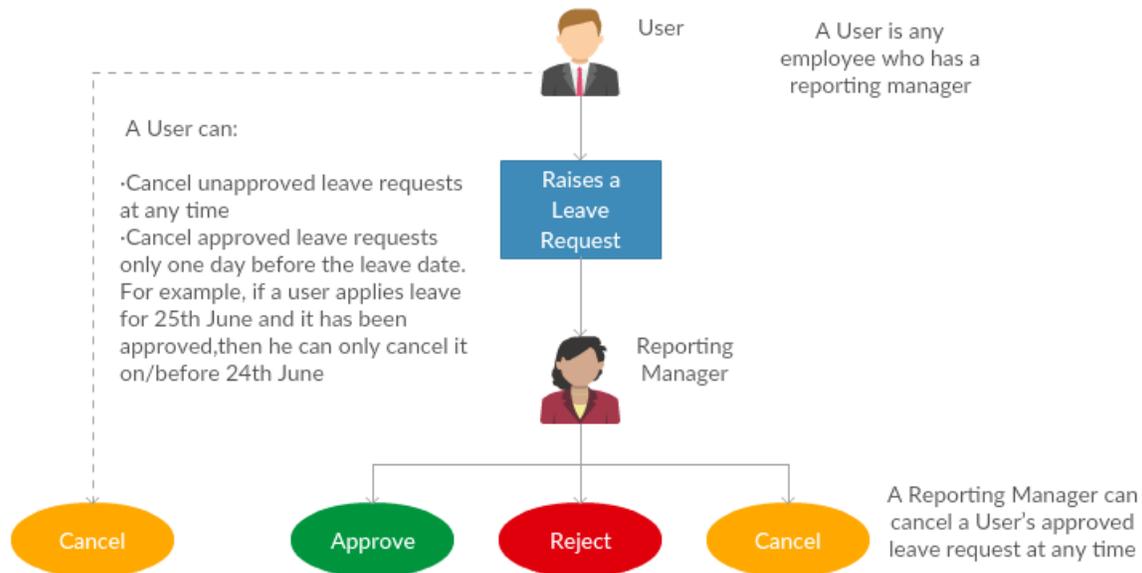
Figure 31



Only the Super Admin and Organization Head can view every employee's birthday announcement. Others can only view birthday announcements of employees in the same department as them.

## 3. Leave Management

One of the main features available in Self Service is Leave Management. You can raise leave requests and have them approved by your reporting manager. Below is the leave management process flowchart.



### Process Description:

- A User (Any User who has a reporting manager) raises a leave request.
- The Reporting Manager, HR and the User will receive an email notification.
- The User can cancel his leave request unapproved or approved (one day before the leave date)
- The Reporting Manager can approve/reject/cancel (at any time) the leave request.
- Once the action has been taken by the Reporting Manager, HR and the User will receive an email notification.



After an approved leave request has been cancelled, the leave(s) are credited back to the user's leave balance.

### 3.1 How do I configure Leave Management Settings?

The **Super Admin/HR** can configure the leave settings and allot leaves for employees. The employees can then utilize the leaves allotted to them.

#### Leave Management Options

Please refer Figure 32.

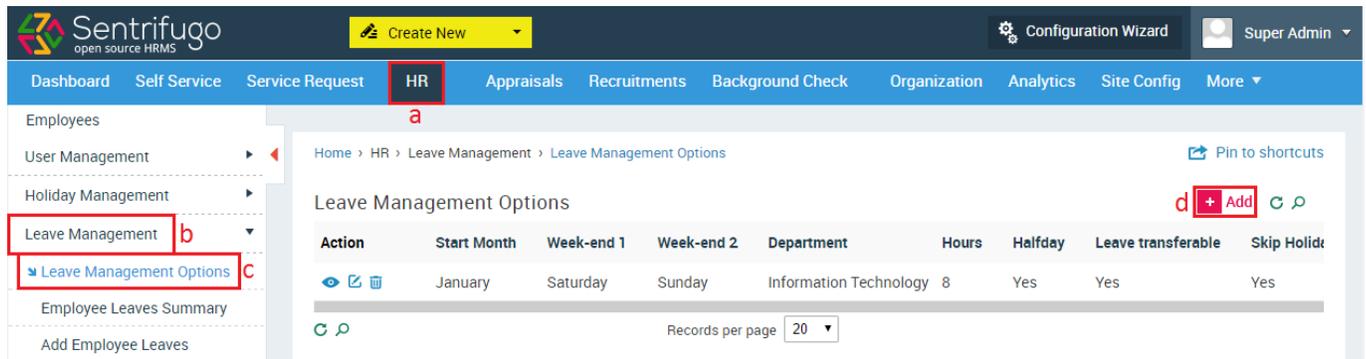


Figure 32

To configure leave management options:

- Click **HR** in the top menu
- Click **Leave Management** on the left panel
- Click **Leave Management Options** in the submenu
- Click **+Add button** on the right side

Please refer Figure 33.

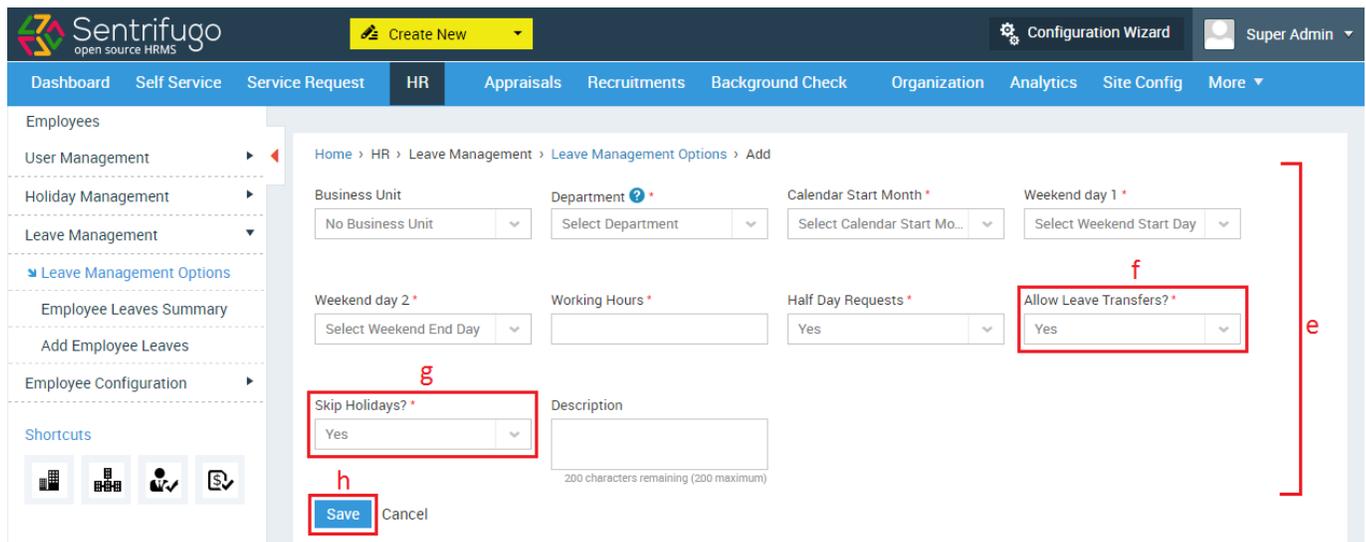


Figure 33

- Fill in the required details

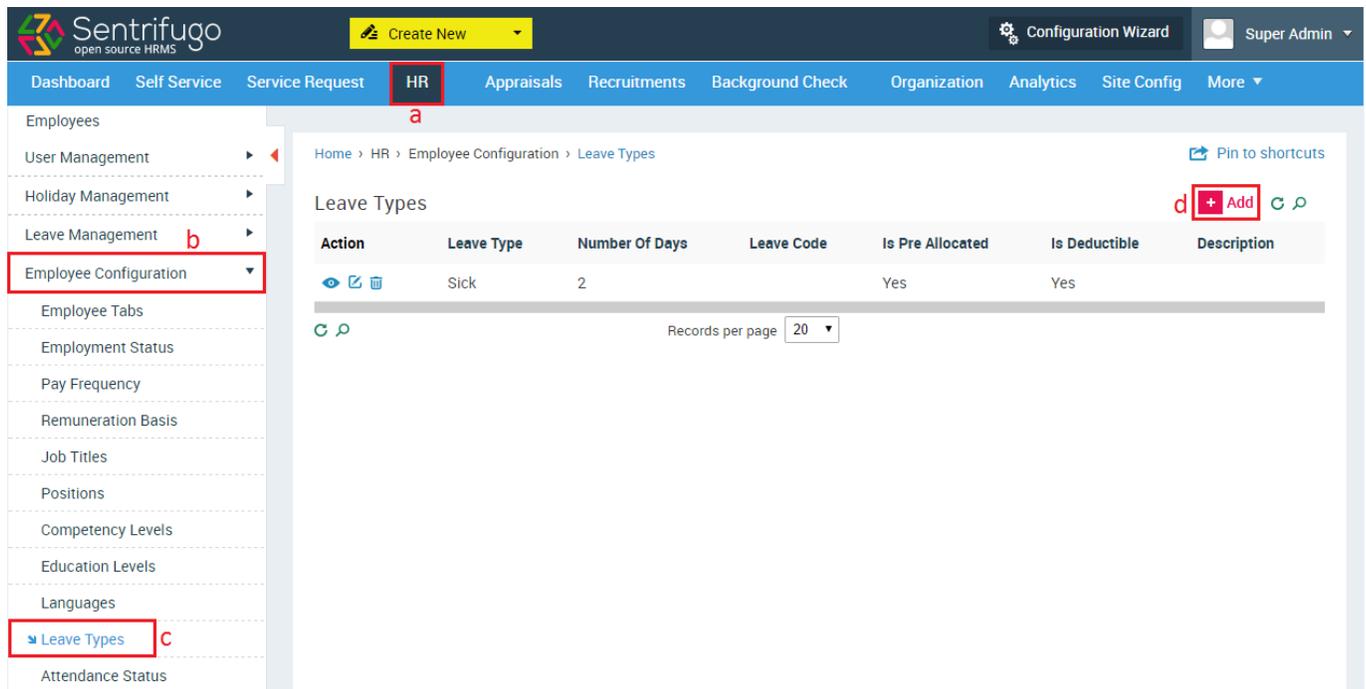
- f. **Allow Leave Transfers:** If there are any unused leaves for an employee in the current year, then by using this option they will be carried forward to the next year.
- g. **Skip Holidays:** If a user applies for a vacation which includes the weekend or any pre-declared holiday, then by using this option, those days will be excluded from the vacation days.
- h. Click **SAVE** button



If each business unit in your organization has different working days and hours, then using this option you can configure the settings.

## 3.2 How do I create Leave Types?

Please refer Figure 34.



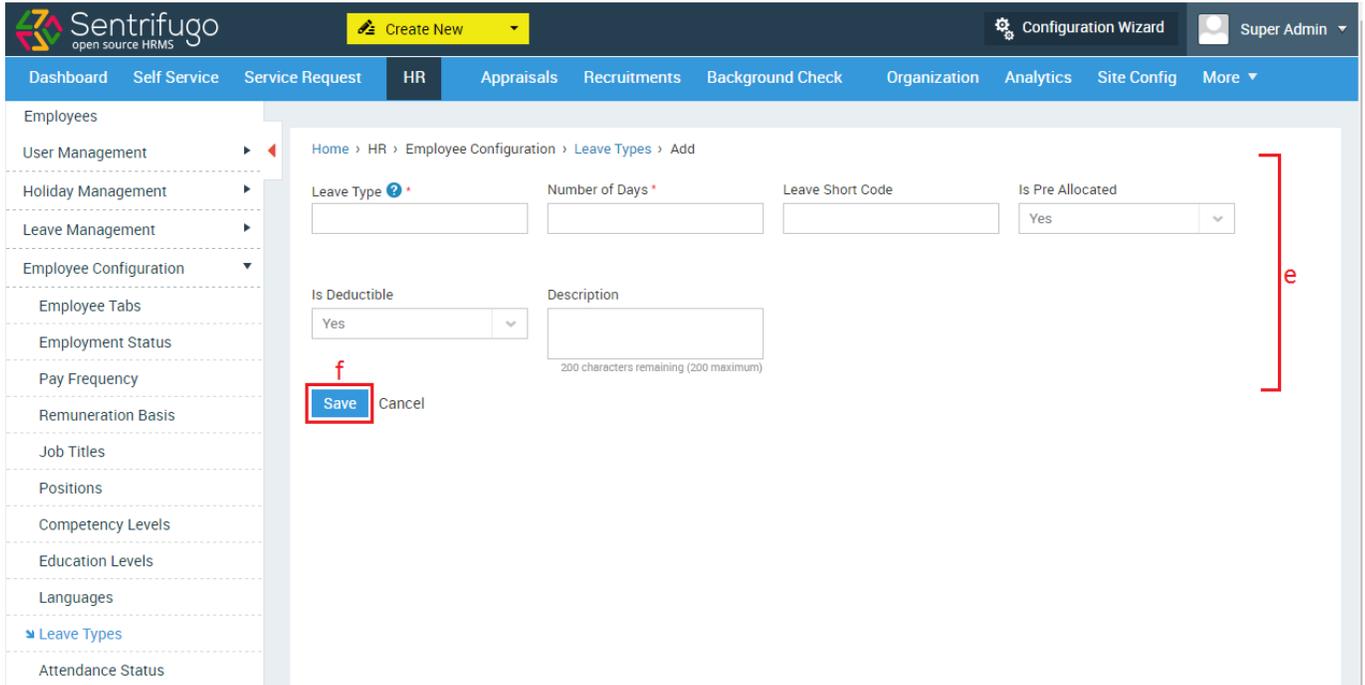
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'HR' (a). The left sidebar has 'Employee Configuration' (b) and 'Leave Types' (c) highlighted. The main content area displays a table of Leave Types with columns: Action, Leave Type, Number Of Days, Leave Code, Is Pre Allocated, Is Deductible, and Description. A '+ Add' button (d) is visible in the top right of the table area.

Action	Leave Type	Number Of Days	Leave Code	Is Pre Allocated	Is Deductible	Description
  	Sick	2		Yes	Yes	

Figure 34

- a. Click **HR** in the top menu
- b. Click **Employee Configuration** on the left menu panel
- c. Click **Leave Types** in the submenu
- d. Click **+Add button** on the right side

Please refer Figure 35.



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar lists various HR modules, with 'Leave Types' selected. The main content area shows the 'Add Leave Type' form with the following fields:

- Leave Type (required)
- Number of Days (required)
- Leave Short Code
- Is Pre Allocated (Yes/No dropdown)
- Is Deductible (Yes/No dropdown)
- Description (200 characters remaining)

At the bottom of the form, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red box and labeled 'f'. A red bracket on the right side of the form is labeled 'e'.

Figure 35

- e. Fill in the required details
- f. Click **SAVE** button to create a new leave type



The number of days assigned to a Leave Type denotes the maximum number of days a User can apply for a leave at one go. It's not the total leave balance for a leave type.

### 3.3 How do I allocate Leave to Employees?

There are two ways to allocate leaves to employees:

- 1) Multiple employees at once (according to Business Units and Departments)
- 2) One employee at a time

#### **Multiple employees at once (according to Business Units and Departments)**

Please refer Figure 36

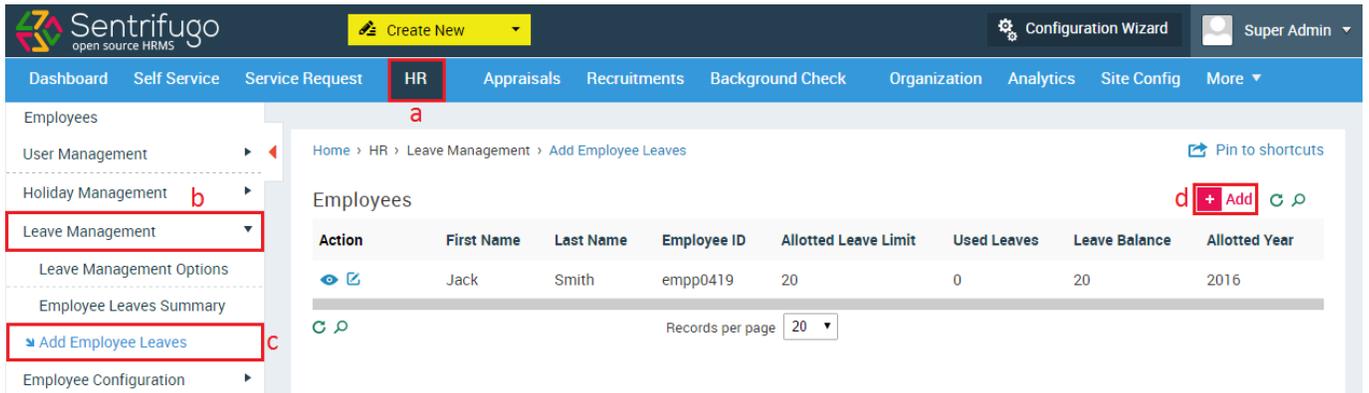


Figure 36

- a. Click **HR** in the top menu
- b. Click **Leave Management** in the left side panel
- c. Click **Add Employee Leaves** in the submenu
- d. Click **+Add** button on the right side

Please refer Figure 37

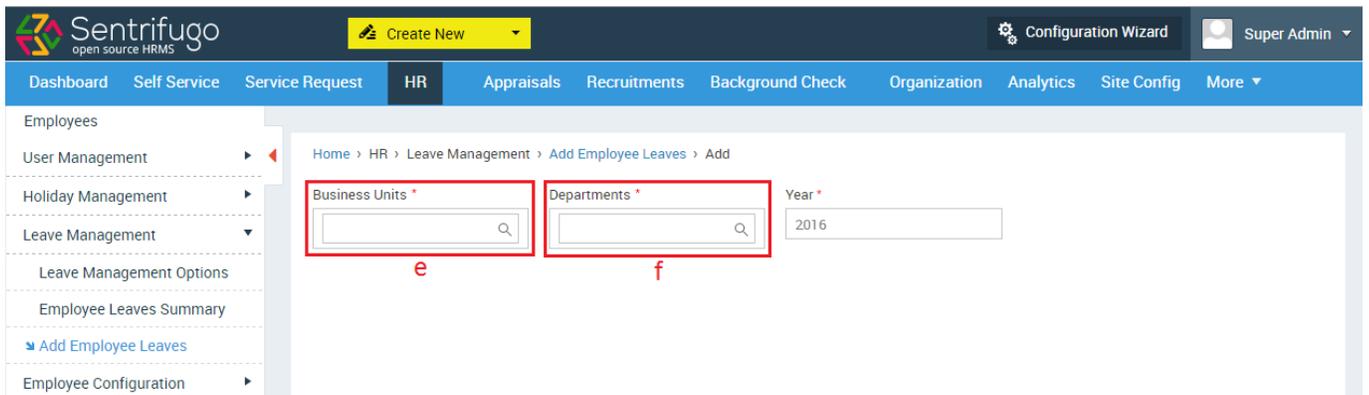


Figure 37

- e. Select the Business Unit(s)
- f. Select the Department(s)

All the employees in the selected Business Unit(s) and Department(s) will be displayed.

Please refer Figure 38

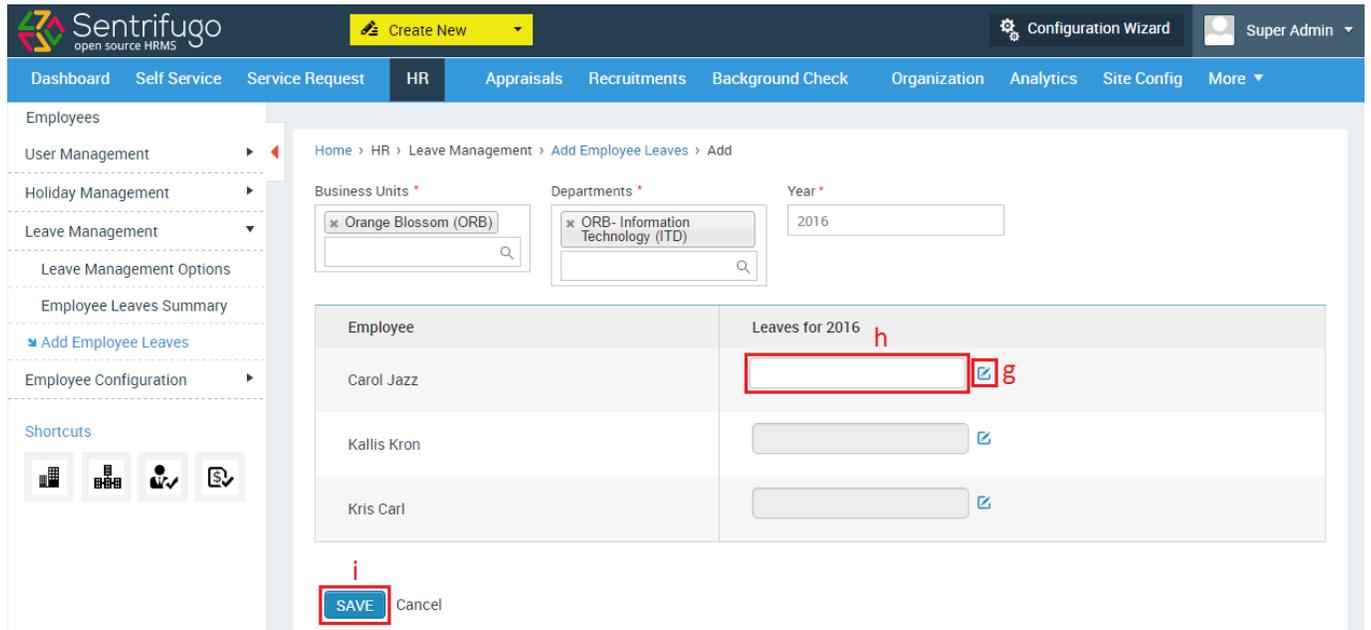


Figure 38

- g. Click **Edit** icon
- h. Enter the number of leaves for each employee
- i. Click **SAVE** button

### One employee at a time

Please refer Figure 39

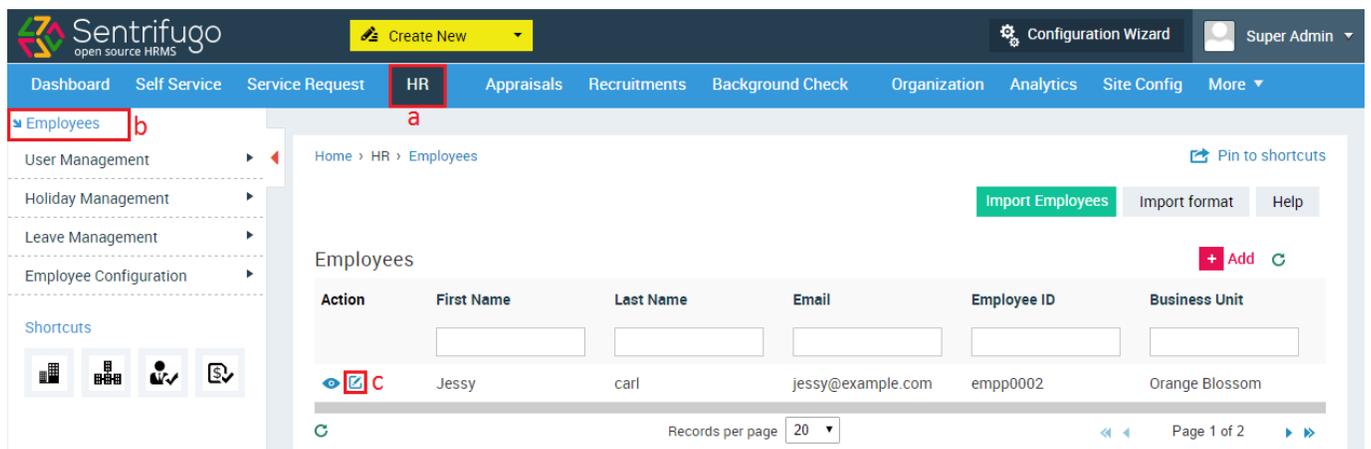


Figure 39

- a. Click **HR** in the top menu
- b. Click **Employees** on the left menu panel
- c. Click **Edit** icon against any employee name

Please refer Figure 40

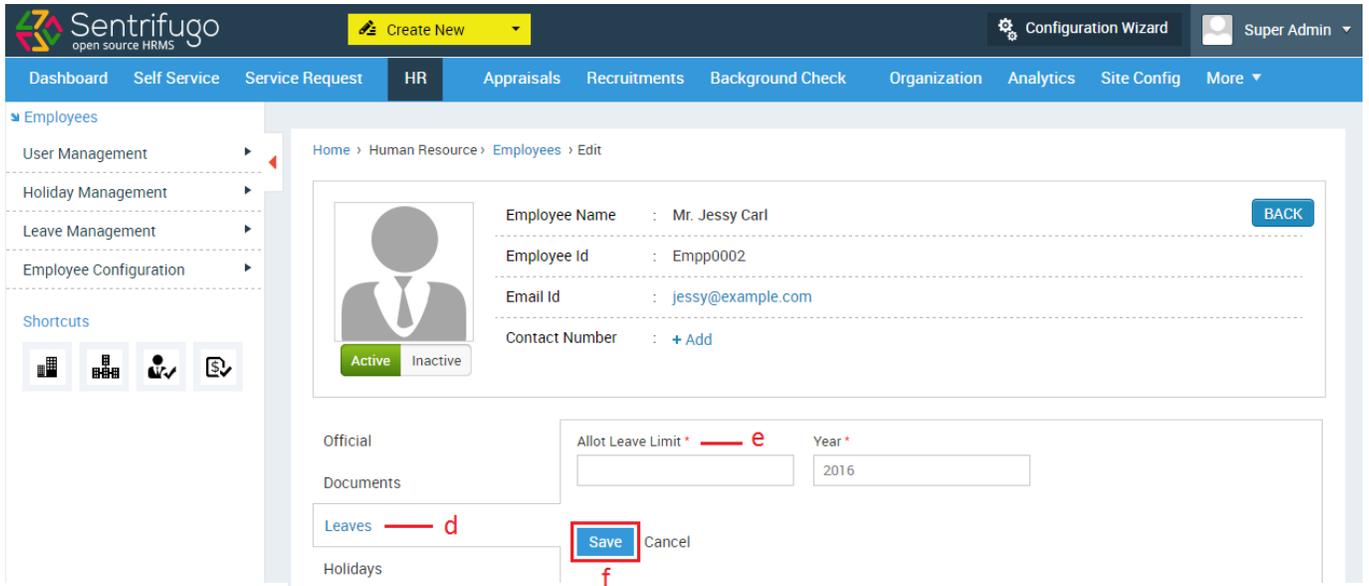


Figure 40

- d. Click **Leaves** on the left menu panel (left side of the form)
- e. Enter the number of days for this employee
- f. Click **SAVE** button



You can allocate leaves to employees only for the current year

### 3.4 How do I deduct Leaves from an Employee?

Please refer Figure 41

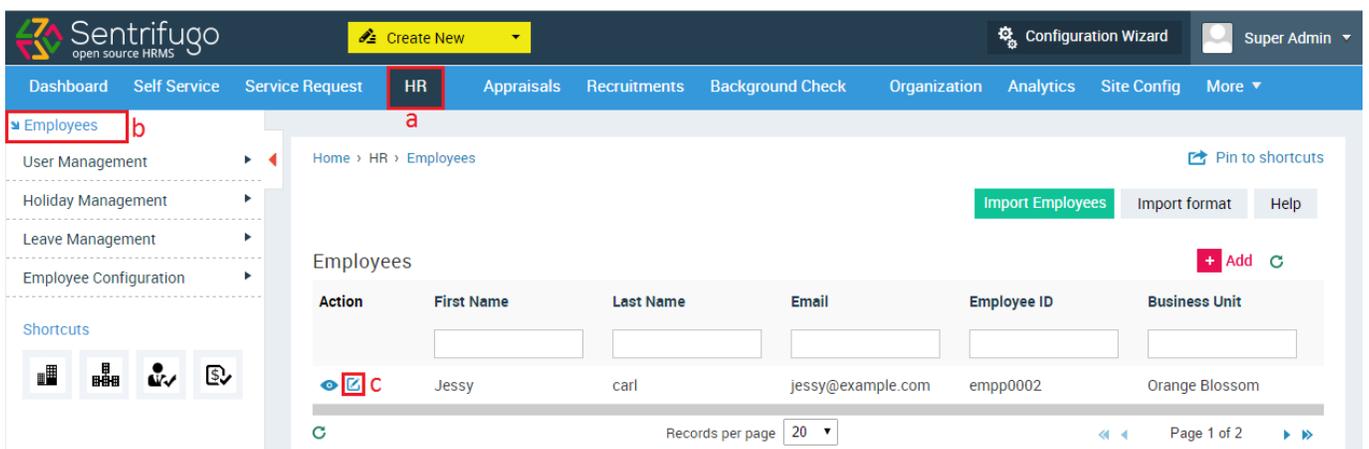
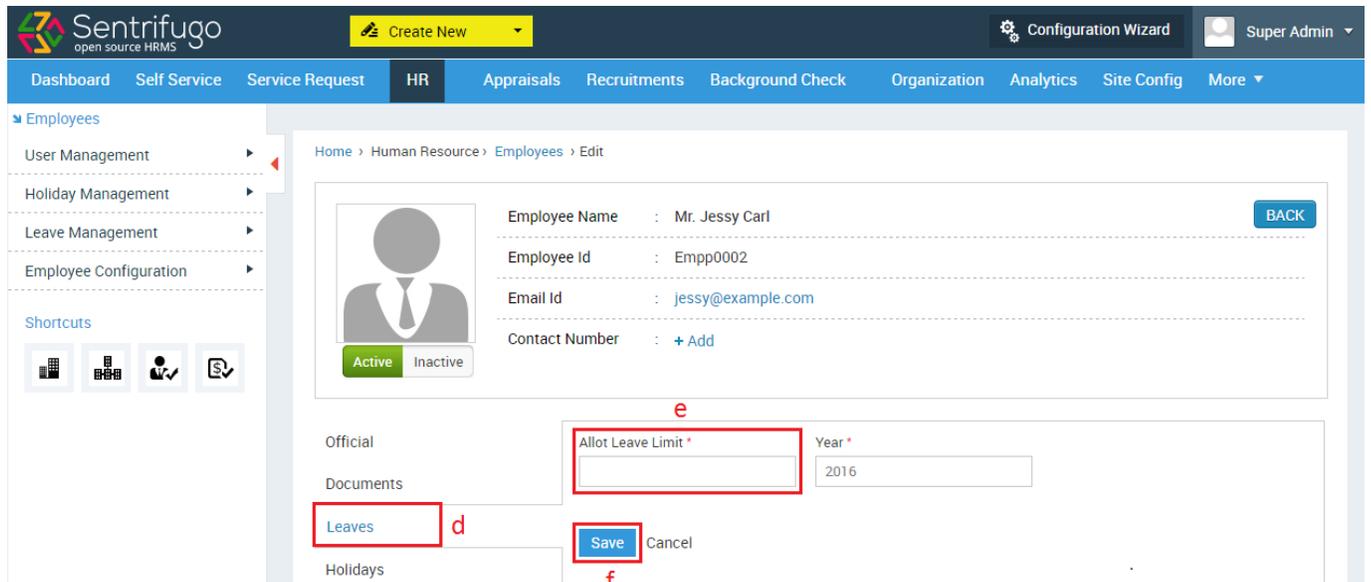


Figure 41

- Click **HR** in the top menu
- Click **Employees** on the left menu panel
- Click **Edit** icon against any employee name

Please refer Figure 42



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar menu has 'Employees' expanded, showing 'User Management', 'Holiday Management', 'Leave Management', and 'Employee Configuration'. The main content area is titled 'Home > Human Resource > Employees > Edit'. It displays employee details for 'Mr. Jessy Carl' (Employee Id: Empp0002, Email Id: jessy@example.com). Below this, there are tabs for 'Official', 'Documents', 'Leaves', and 'Holidays'. The 'Leaves' tab is active, showing an 'Allot Leave Limit' field (highlighted with a red box 'e') and a 'Year' field (set to 2016). A 'Save' button (highlighted with a red box 'f') and a 'Cancel' button are at the bottom. A 'BACK' button is also present in the top right of the form area.

Figure 42

- Click **Leaves** on the left menu panel (on the left side of the form)
- Enter the number of days with a **'-' sign preceding the number** for the employee
- Click **SAVE** button



You can add/remove leaves for an employee, whenever required.  
 (Only for the current year)

### 3.5 How do I create HR Email Group for Leave Management?

Employees and their reporting managers are informed through email notifications about any action (leave request raised, leave request approved etc.) taken during the leave cycle. In order to send email notifications to HR also, you will need to configure an HR email group. If an HR group email is not configured, the following message will be displayed:

 Mail will not be sent to the HR as the HR group mail is not configured.

Please refer Figure 43

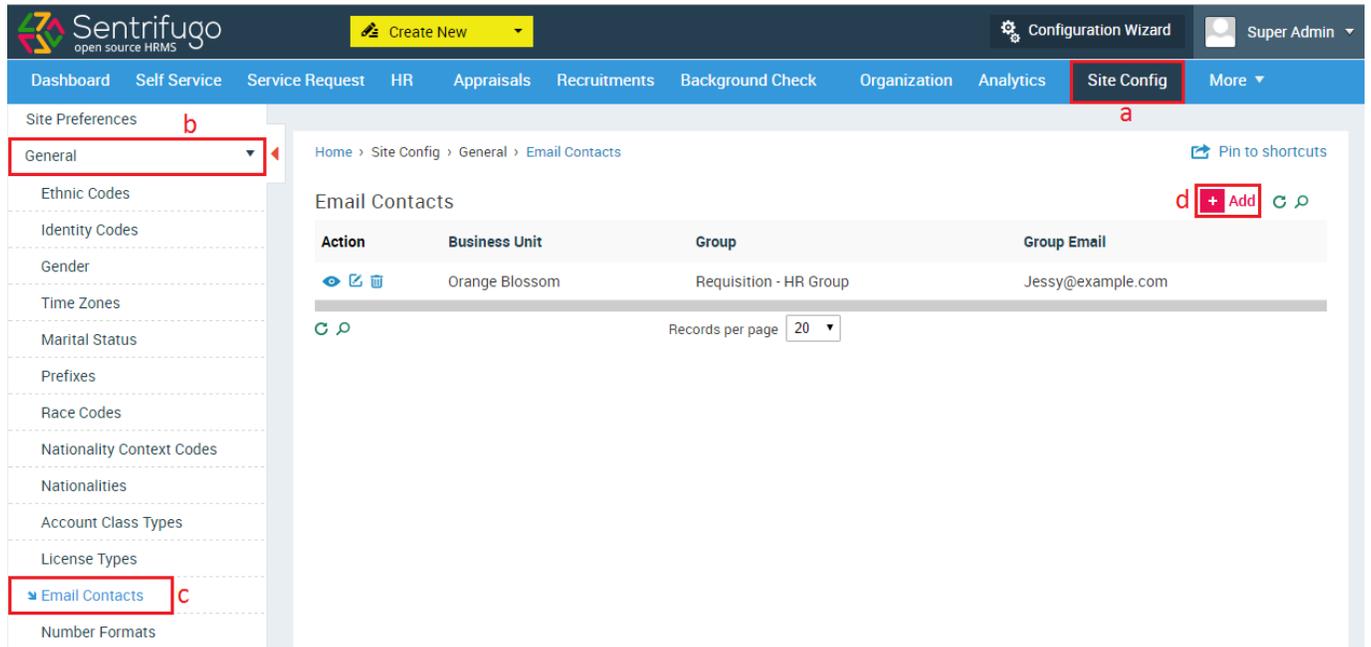


Figure 43

- a. Click **Site Config** on the top menu
- b. Click **General** on the left menu panel
- c. Click **Email Contacts** in the submenu
- d. Click **+Add** button

Please refer Figure 44

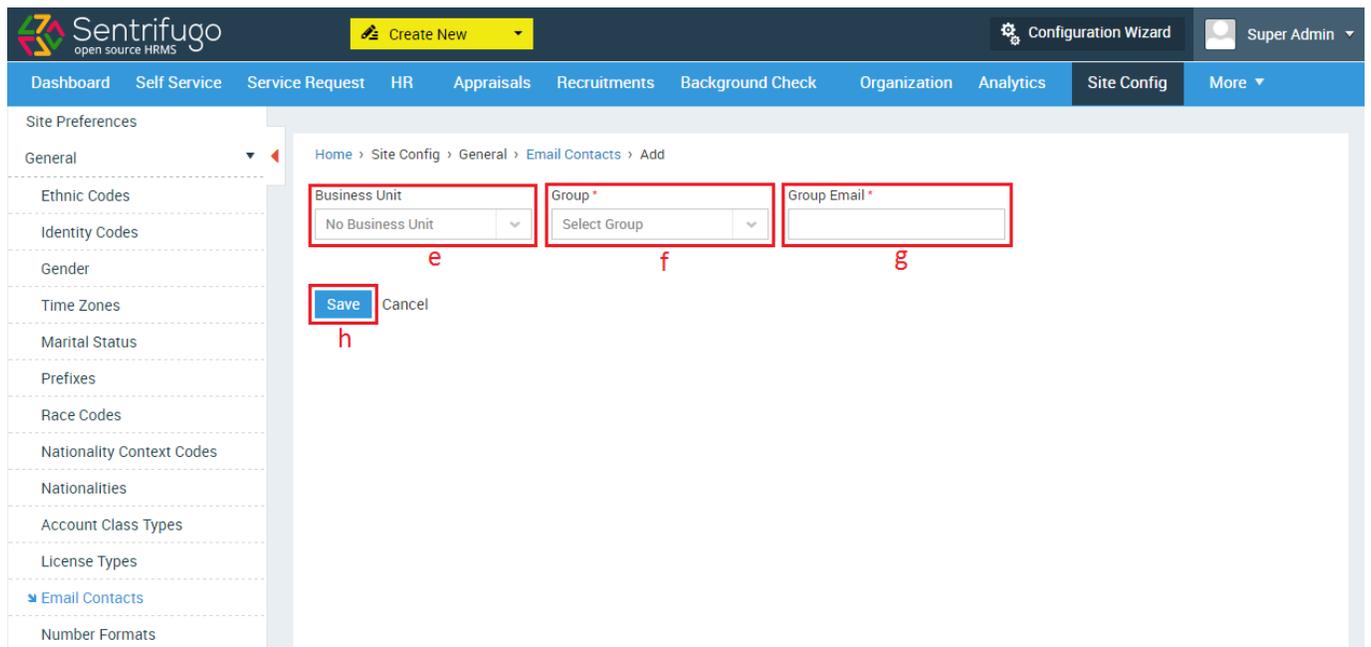


Figure 44

- e. Select the Business Unit
- f. Select **Leave Management Group**
- g. Enter group email id
- h. Click **SAVE** button



Every HR email must be unique for a Business Unit. If repeated, you will get an error message: **Group email already exists.**

### 3.6 How do I raise a Leave Request?

Before raising a leave request, ensure that you have been allotted leaves for the current year. If you have not been allotted leave an information message will be displayed:



You have not been allotted leaves for this financial year. Please contact your HR

**To raise a leave request:**

Please refer Figure 45

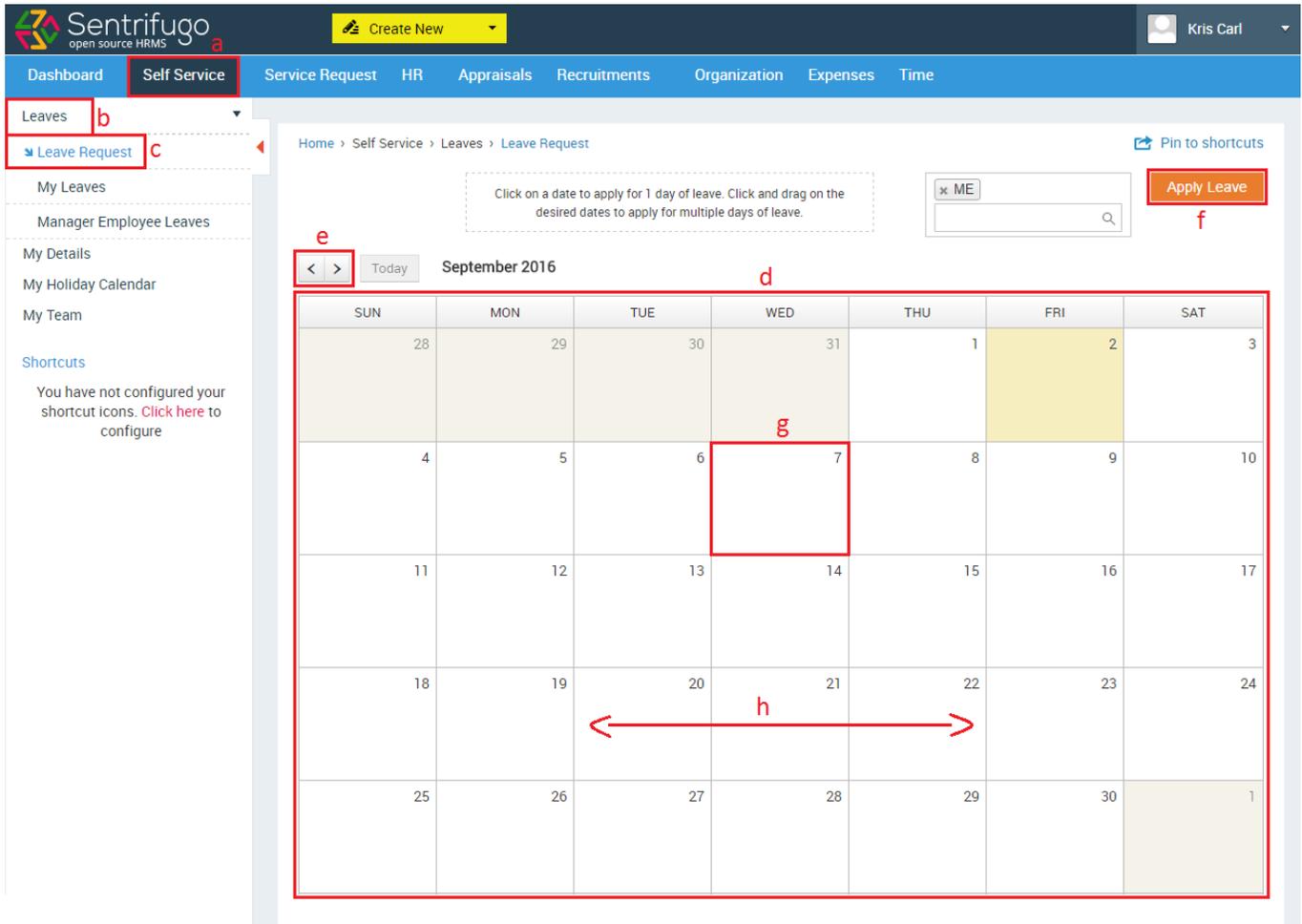


Figure 45

- a. Click **Self Service** in the top menu
- b. Click **Leaves** on the left menu panel
- c. Click **Leave Request** in the submenu
- d. The current month calendar will be displayed on the right side panel
- e. Click on previous and next arrow buttons to move to previous or next month
- f. Click **Apply Leave** to apply leave for the current day
- g. Click on any date on the calendar plugin to apply for a day's leave
- h. Click and drag on the dates to apply for a long leave (multiple days)

After **f/g/h** a small window 'Create: Leave Request' will open.

Please refer Figure 46

### Create: Leave request ✕

**Available Leaves \***

**Leave Type \***

Select Leave Type

**Reason \***

30 characters remaining (30 maximum)

**From ? \***

2016-Sep-14

**To ? \***

2016-Sep-14

**Leave For \***

Full Day

**Days**

**Reporting Manager \***

Jim Jim

Apply

Cancel

Figure 46

- i. Enter the required details
- j. Click **APPLY** button

Leave requests will be displayed in 'Pending Leaves' until an action is performed by the reporting manager

Please refer Figure 47


Create New

 Hans Cronje

Dashboard

Self Service

Service Request

HR

Appraisals

Recruitments

Organization

Expenses

Time

Leaves

- Leave Request
- My Leaves
- Manager Employee Leaves
- My Details
- My Holiday Calendar
- My Team
- Shortcuts

Home > Self Service > Leaves > My Leaves Pin to shortcuts

**Pending Leaves**  
1

**Cancel Leaves**  
0

**Approved Leaves**  
0

**Rejected Leaves**  
0

**All**  
1

**My Leaves** Refresh

Action	Leave Type	Reason	From Date	To Date	Days	Applied On
	Sick	Fever	2016-Sep-13	2016-Sep-13	1.0	2016-Sep-07

Records per page: 20

Figure 47

### 3.7 How do I cancel a Leave Request?

Employees can cancel an unapproved leave request at any time. Once a leave request has been approved, they can cancel it only **ONE DAY BEFORE** the actual leave date. Managers can cancel approved leaves at any time.

#### Employee

Please refer Figure 48

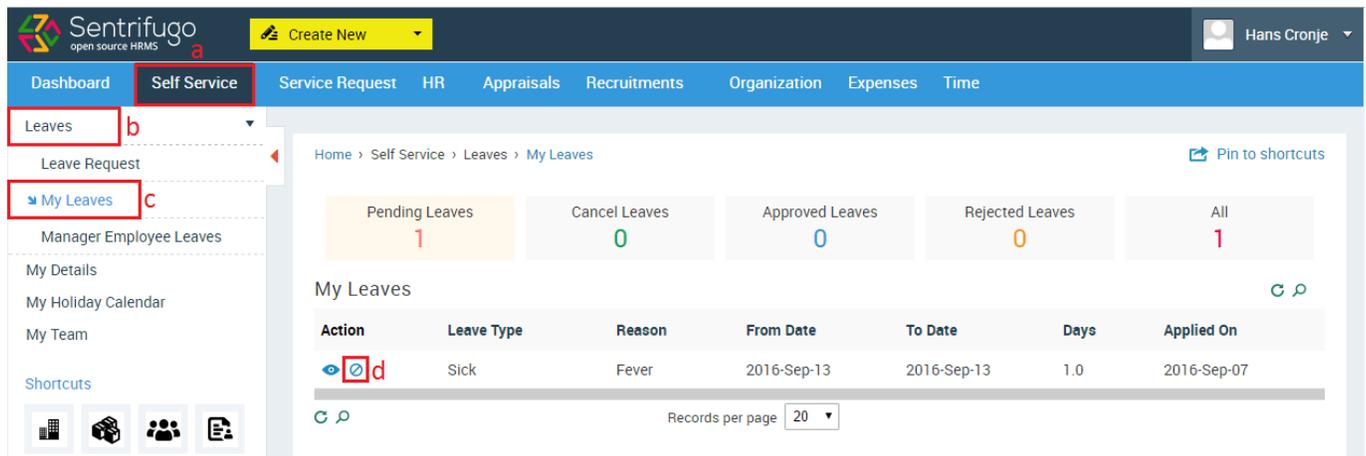


Figure 48

- a. Click **Self Service** in the top menu bar
- b. Click **Leaves** on the left side panel
- c. Click **My Leaves** in the submenu
- d. Click **Cancel** icon in the Action column

A confirmation message will be displayed

Please refer Figure 49

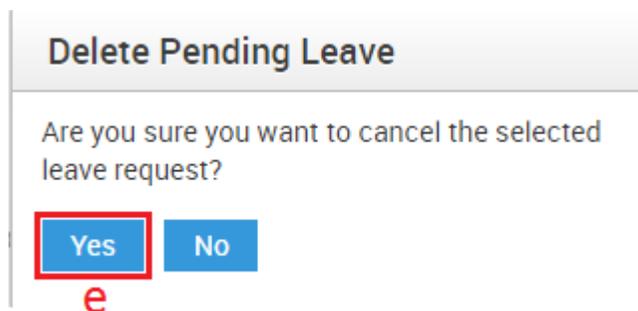


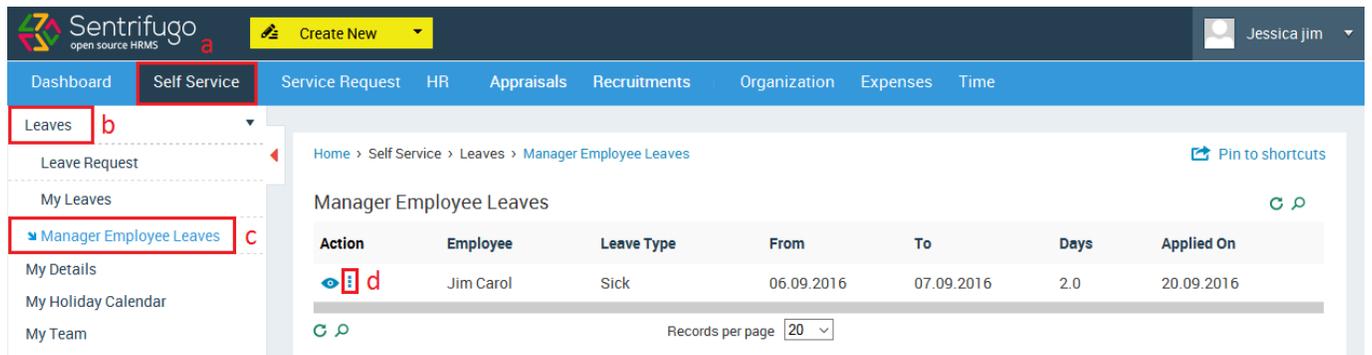
Figure 49

- f. Click **Yes** button to cancel the leave

You can view your cancelled leaves in **Self Service > Leaves > My Leaves > Canceled Leaves**

## Manager

Please refer Figure 50



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. The left sidebar has 'Leaves' expanded, showing 'Leave Request', 'My Leaves', 'Manager Employee Leaves', 'My Details', 'My Holiday Calendar', and 'My Team'. The main content area displays 'Manager Employee Leaves' with a table of leave requests.

Action	Employee	Leave Type	From	To	Days	Applied On
	Jim Carol	Sick	06.09.2016	07.09.2016	2.0	20.09.2016

Records per page: 20

Figure 50

- Click **Self Service** in the top menu bar
- Click **Manager Employee Leaves** on the left side panel
- The leave requests by employees will be displayed in a grid
- Click **More Action** button in the Action column

A small pop up window will open.

Please refer Figure 51

### Leaverequest ✕

Status — e

Cancel
▼

Comments

50 characters remaining (50 maximum)

SAVE

f

Employee	Jim Carol	Leave Type	Sick
From	06.09.2016	To	07.09.2016
Leave For	Full Day	Days	2.0
Approved On	20.09.2016	Comments	

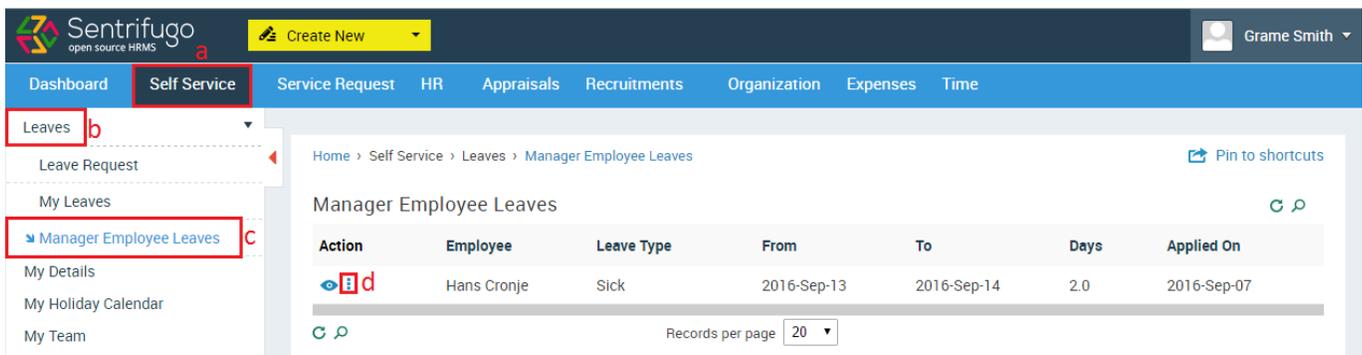
Figure 51

- e. Select Cancel
- f. Click **SAVE** button

### 3.8 How do I Approve/Reject an Employee's Leave Request?

Employees' reporting managers have the privilege to approve/reject leave requests.

Please refer Figure 52



The screenshot shows the Sentrifugo interface. At the top, there's a navigation bar with 'Self Service' highlighted. A dropdown menu is open under 'Leaves', with 'Manager Employee Leaves' selected. The main content area displays a table titled 'Manager Employee Leaves' with the following data:

Action	Employee	Leave Type	From	To	Days	Applied On
<span style="color: blue;">👁️</span> <span style="color: red;">d</span>	Hans Cronje	Sick	2016-Sep-13	2016-Sep-14	2.0	2016-Sep-07

At the bottom of the table, there is a 'Records per page' dropdown set to 20.

Figure 52

- a. Click **Self Service** in the top menu
- b. Click **Leaves** on the left menu panel
- c. Click **Manage Employee Leaves** in the submenu
- d. Click **More Actions** button in the Action column

A small pop up window will open.

Please refer Figure 53

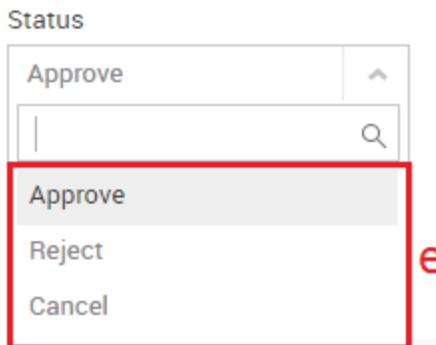


Figure 53

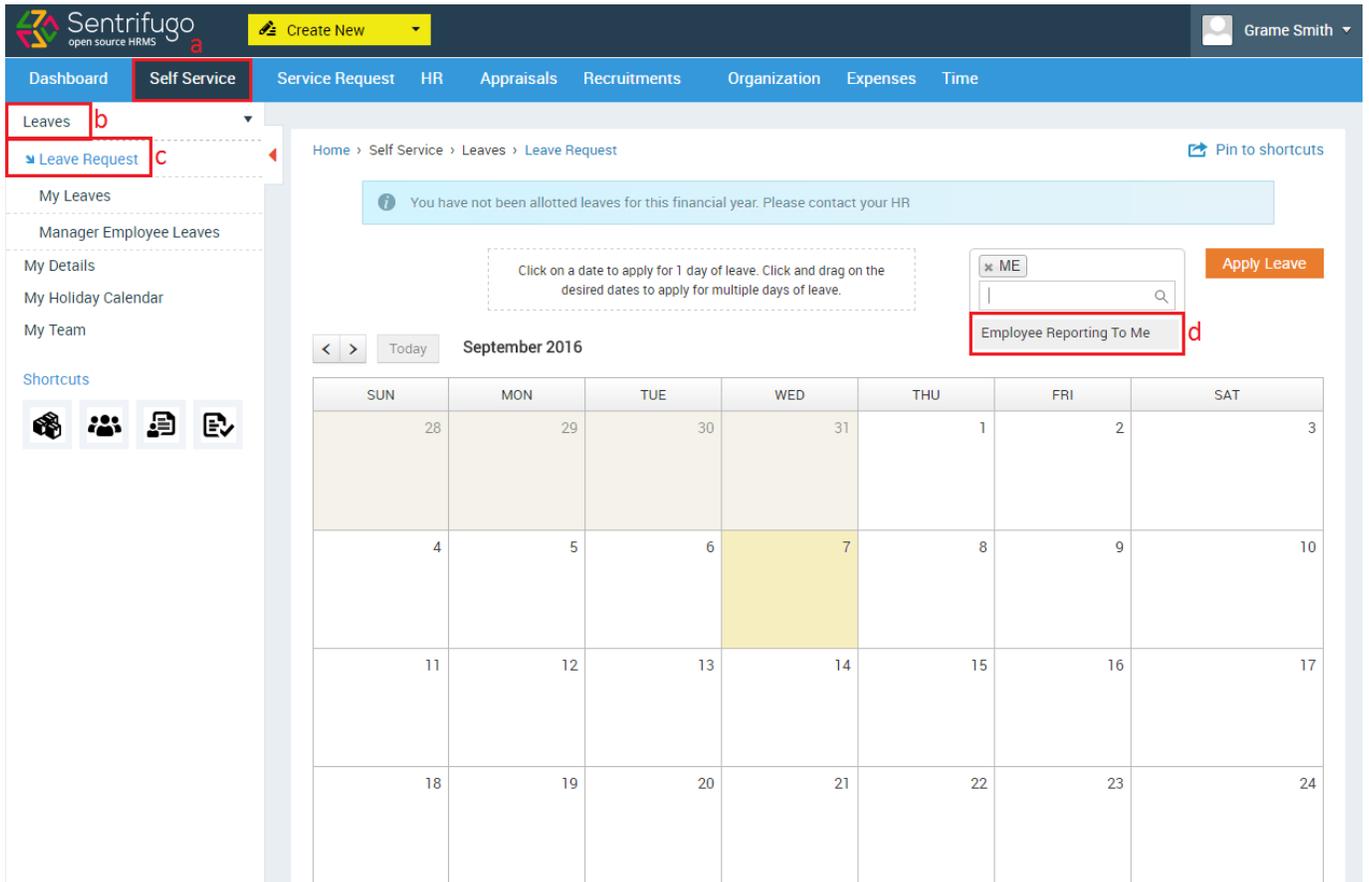
- e. Select the status

Click SAVE button to complete the selected action.

### 3.9 How do I view the Approved Leaves and Leave Requests of all the Employees Reporting to Me?

Reporting Manager can view the approved leaves and leave requests of all the employees reporting to them by using the calendar plugin.

Please refer Figure 54



Home > Self Service > Leaves > Leave Request

You have not been allotted leaves for this financial year. Please contact your HR

Click on a date to apply for 1 day of leave. Click and drag on the desired dates to apply for multiple days of leave.

Employee Reporting To Me

SUN	MON	TUE	WED	THU	FRI	SAT
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24

Figure 54

- a. Click **Self Service** in the top menu
- b. Click **Leaves** on the left menu panel
- c. Click **Leave Request** in the submenu
- d. Select the option 'Employee reporting to me'

For the day(s) on which employees have taken leave(s) or raised leave request(s), a horizontal bar having the employee's name on it will be displayed across the dates.

Please refer Figure 55

September 2016

SUN	MON	TUE	WED	THU	FRI	SAT
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

Hans Cronje, Leave, (A)  
Click here



### Leaverequest x

Status

Comments

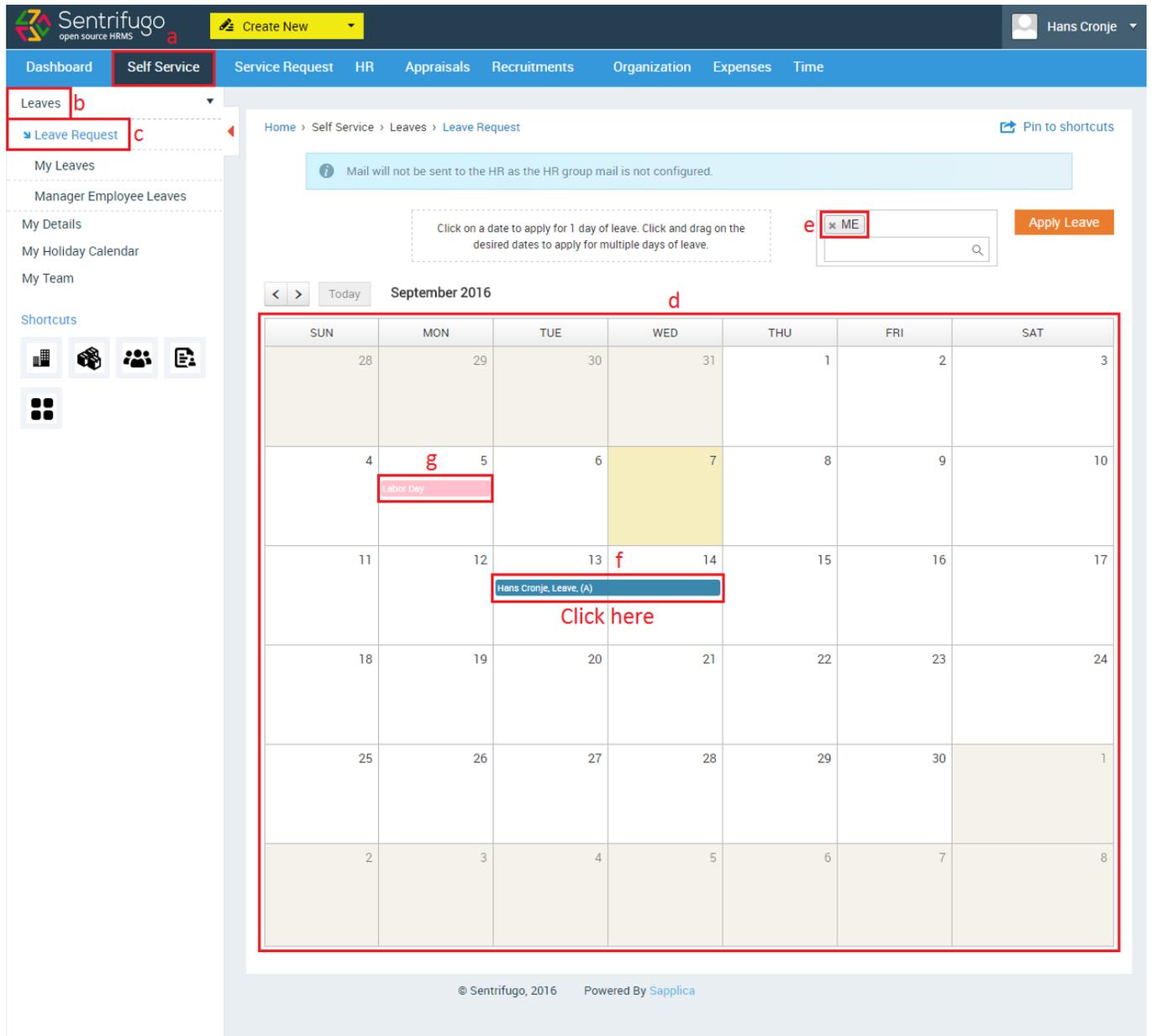
50 characters remaining (50 maximum)

Employee	Hans Cronje	Leave Type	Sick
From	2016-09-13	To	2016-09-14
Leave For	Full Day	Days	2.0
Approved On	2016-Sep-07	Comments	

Figure 55

### 3.10 How do I view my own Leave(s)/Leave Request(s)?

Please refer Figure 56



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. The left sidebar has 'Leaves' and 'Leave Request' highlighted. The main content area shows a calendar for September 2016. A horizontal bar highlights the date 13th (Wednesday) with the text 'Hans Cronje, Leave, (A)'. Other annotations include 'Labor Day' on the 5th and 'Click here' pointing to the highlighted bar. A search dropdown shows 'ME' selected.

SUN	MON	TUE	WED	THU	FRI	SAT
28	29	30	31	1	2	3
4	5 Labor Day	6	7	8	9	10
11	12	13 Hans Cronje, Leave, (A)	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

Figure 56

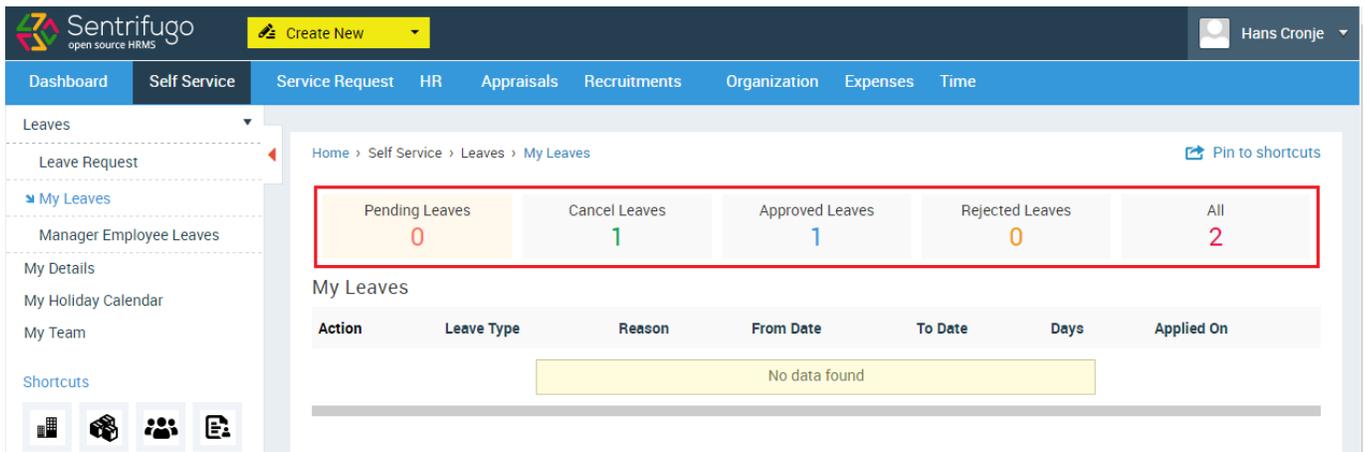
- Click **Self Service** in the top menu
- Click **Leaves** on the left side panel
- Click **Leave Request** in the submenu
- A calendar plugin will be displayed.
- Select the option 'Me' (It will be selected by default)
- For the day(s) on which you have taken leave(s)/raised leave request(s), a horizontal bar will displayed across those dates.

g. You can also see holidays

Your leaves requests will be categorized in to 5 types:

- Pending Leaves
- Canceled Leaves
- Approved Leaves
- Rejected Leaves
- All

Please refer Figure 57

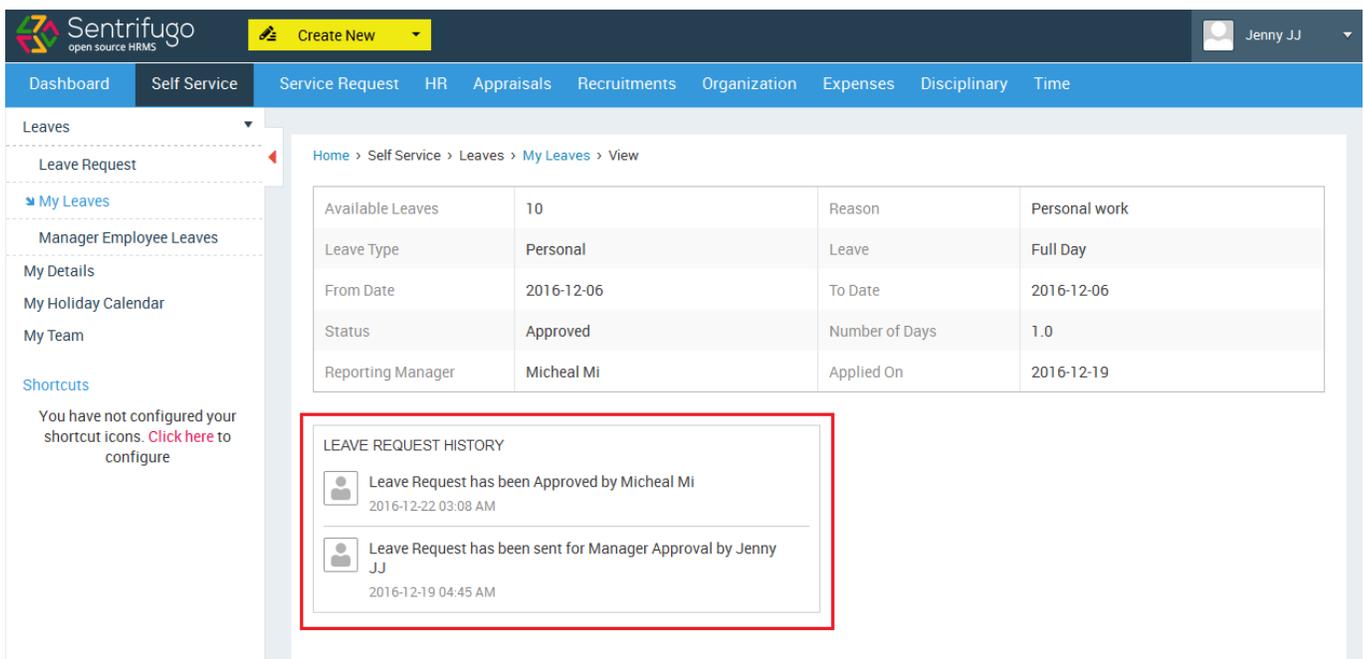


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. The user is logged in as Hans Cronje. The left sidebar shows a 'Leaves' menu with options like 'Leave Request', 'My Leaves', and 'Manager Employee Leaves'. The main content area displays a summary of leave categories: Pending Leaves (0), Cancel Leaves (1), Approved Leaves (1), Rejected Leaves (0), and All (2). Below this is a table titled 'My Leaves' with columns for Action, Leave Type, Reason, From Date, To Date, Days, and Applied On. The table currently shows 'No data found'.

Figure 57

Click on any category to view the leaves accordingly.

An activity log will be displayed for every action performed by user(s) involved in a Leave Management Cycle. This will provide users more clarity about the status of the process.



The screenshot shows the Sentrifugo HRMS interface for viewing a leave request. The user is logged in as Jenny JJ. The main content area displays a summary of the leave request with the following details:

Available Leaves	10	Reason	Personal work
Leave Type	Personal	Leave	Full Day
From Date	2016-12-06	To Date	2016-12-06
Status	Approved	Number of Days	1.0
Reporting Manager	Micheal Mi	Applied On	2016-12-19

Below the summary is a section titled 'LEAVE REQUEST HISTORY' with a red border, containing the following activity log entries:

- Leave Request has been Approved by Micheal Mi  
2016-12-22 03:08 AM
- Leave Request has been sent for Manager Approval by Jenny JJ  
2016-12-19 04:45 AM

### 3.11 How do I create Holiday Groups?

Holiday Groups are useful for organizations having teams located in different countries or which follow different holiday calendars.

Please refer Figure 58

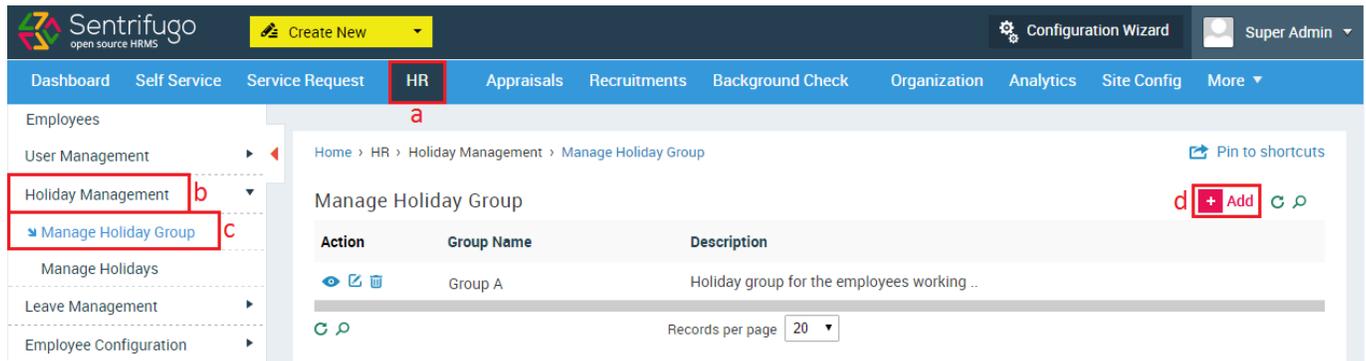


Figure 58

- a. Click **HR** in the top menu
- b. Click **Holiday Management** on the left menu panel
- c. Click **Manage Holiday Group** in the submenu
- d. Click **+Add** button

Please refer Figure 59

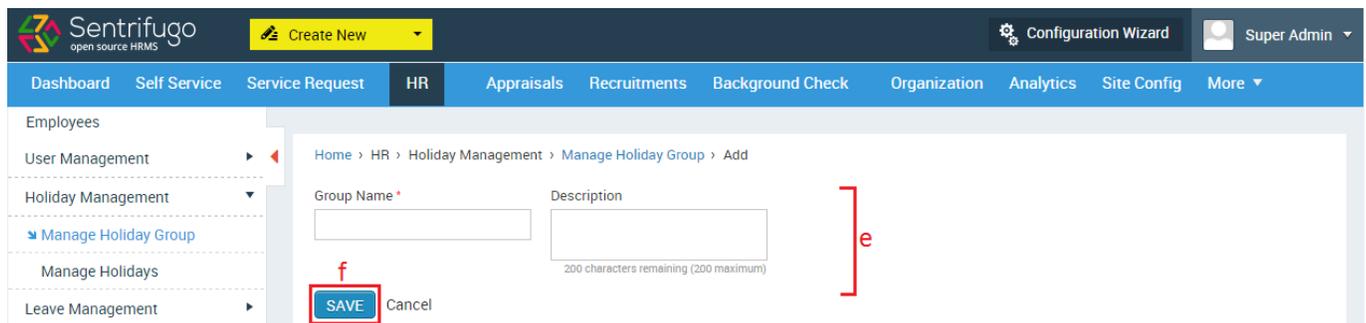


Figure 59

- e. Enter the required details
- f. Click **SAVE**

### 3.12 How do I create Holidays?

Please refer Figure 60

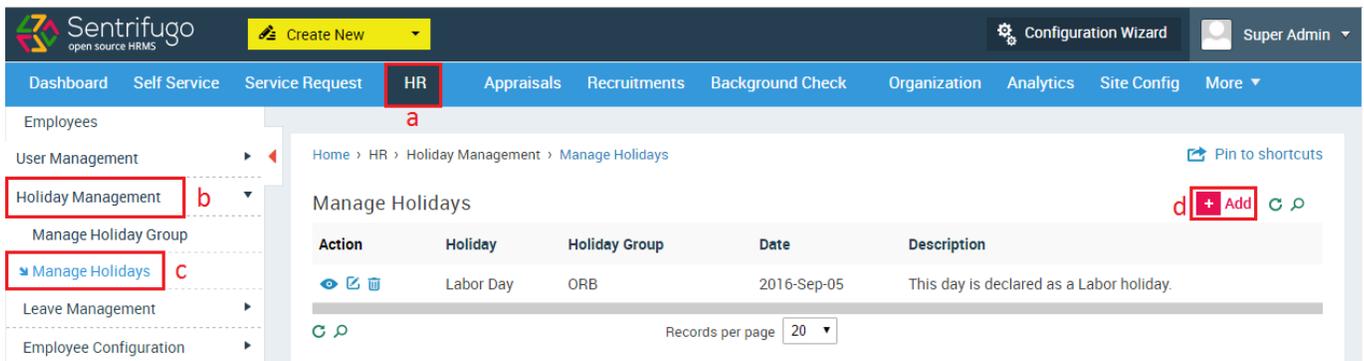


Figure 60

- a. Click **HR** in the top menu
- b. Click **Holiday Management** on the left menu panel
- c. Click **Manage Holidays** in the submenu
- d. Click **+Add** button

Please refer Figure 61

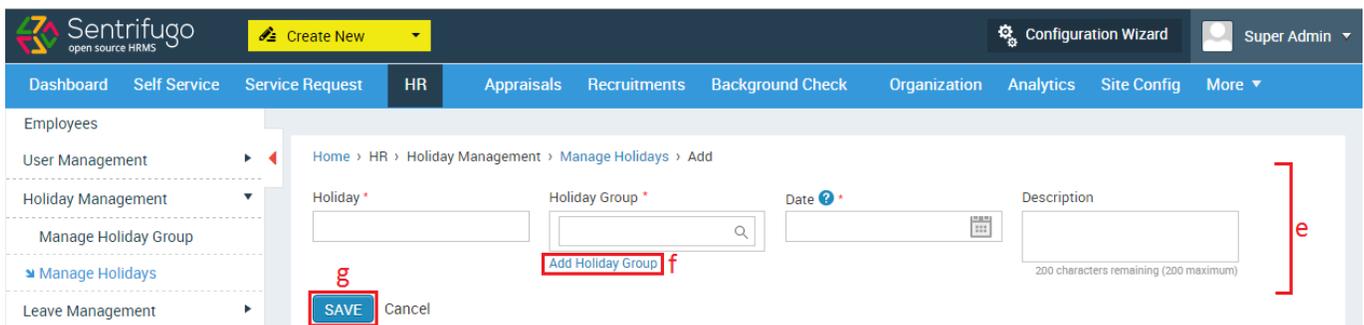


Figure 61

- e. Enter the required details
- f. Add a new Holiday Group
- g. Click **SAVE** button

By providing a Holiday Group name, you will be assigning the Holiday to a Holiday Group.

### 3.13 How do I assign Holidays to Employees?

Please refer Figure 62

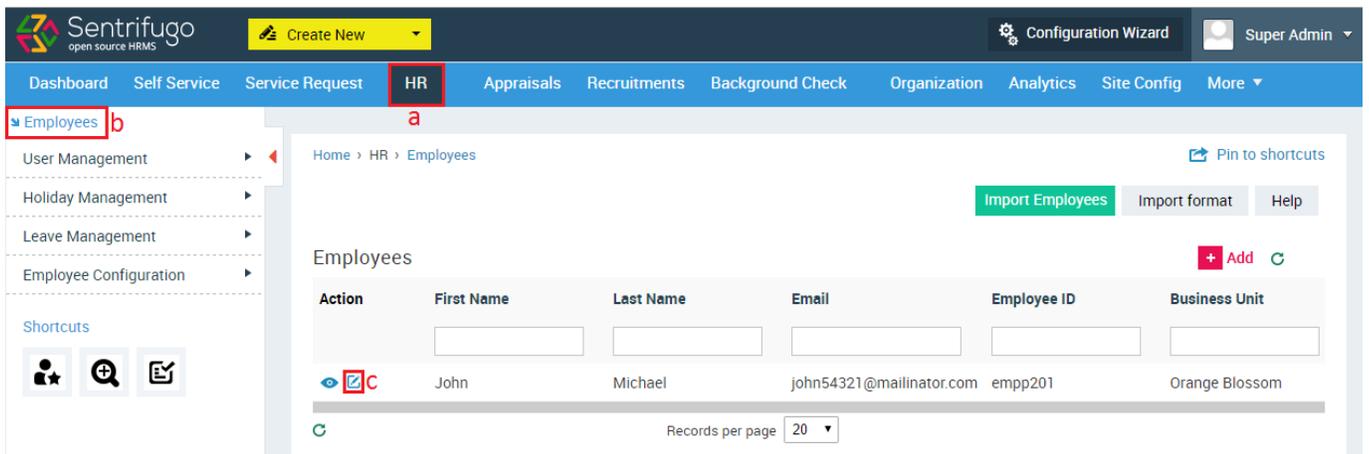


Figure 62

- a. Click **HR** in the top menu
- b. Click **Employees** on the left menu side
- c. Click **Edit** icon against any employee name

Please refer Figure 63

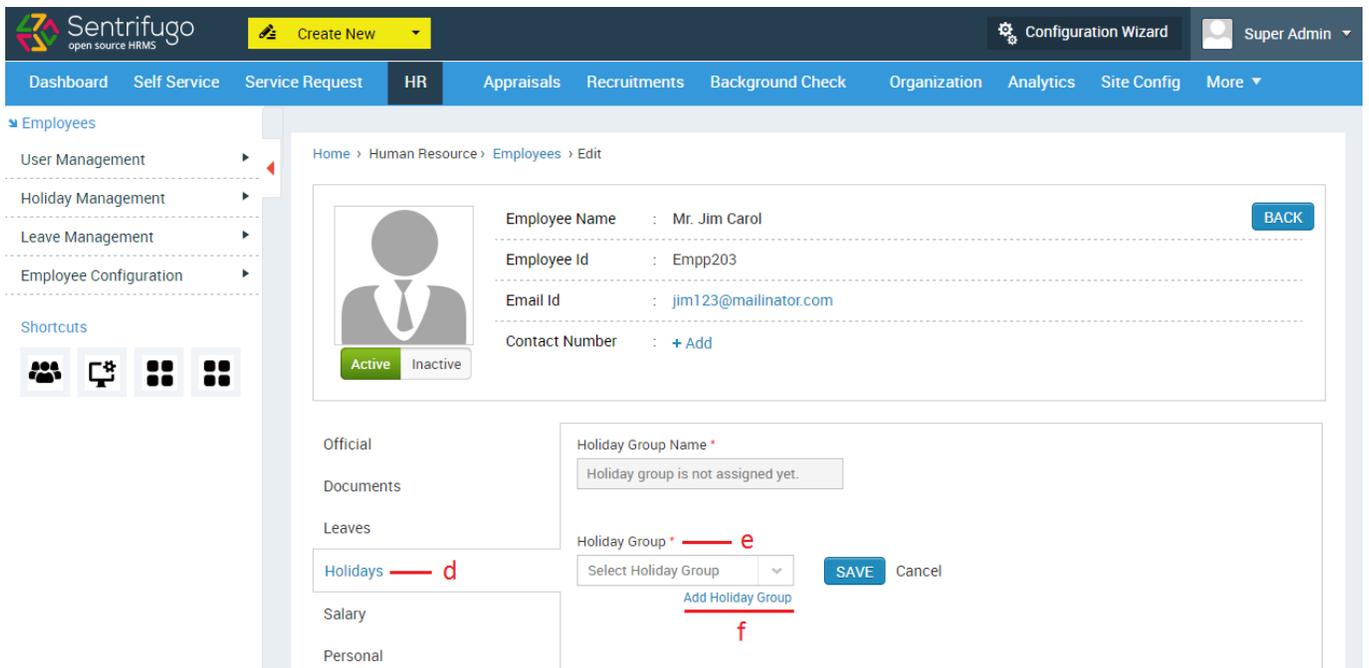
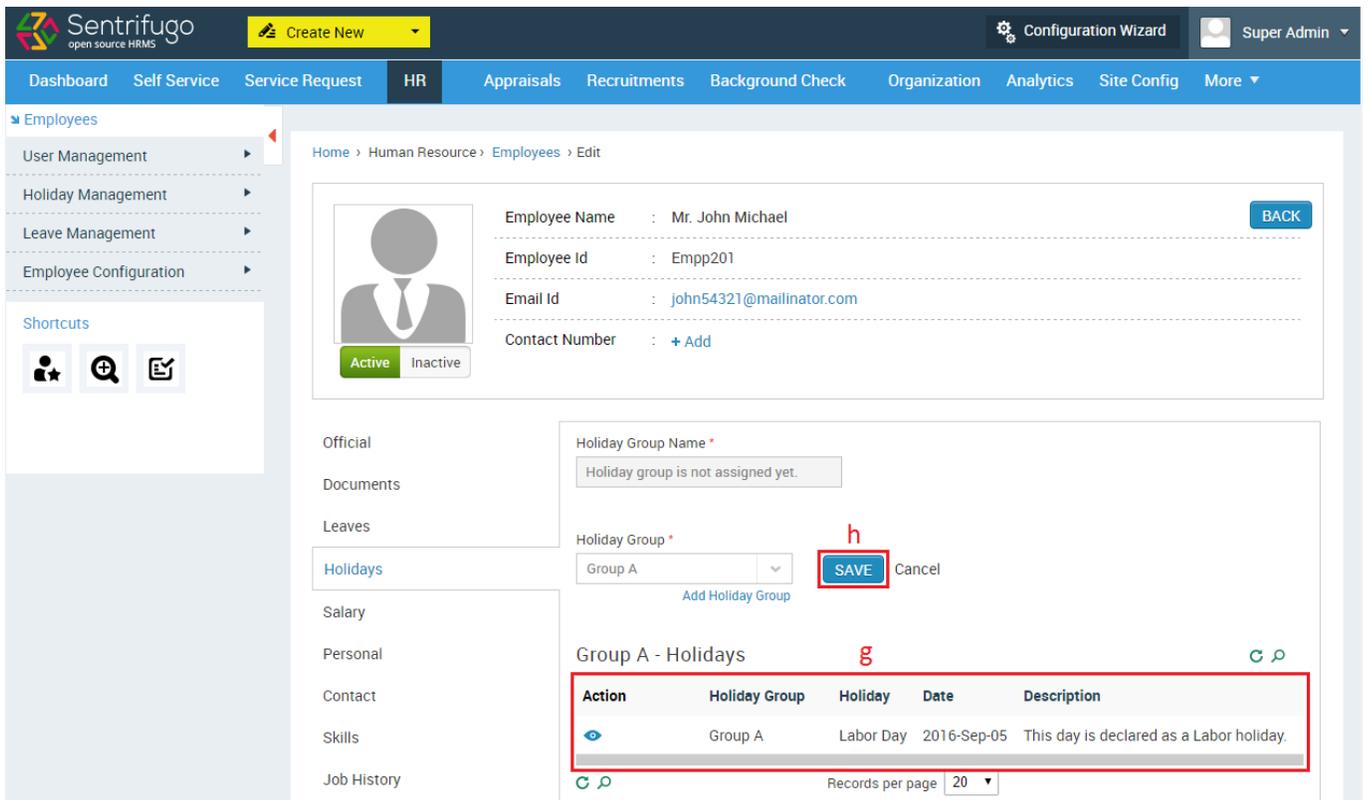


Figure 63

- d. Click **Holidays** on the left menu panel (Form's left side)
- e. Select a Holiday Group from the drop down option
- f. Create a new Holiday Group

*Please refer Figure 64*



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar lists 'Employees' with sub-items: 'User Management', 'Holiday Management', 'Leave Management', and 'Employee Configuration'. Below these are 'Shortcuts' with icons for user, search, and document.

The main content area is titled 'Home > Human Resource > Employees > Edit'. It displays employee information for 'Mr. John Michael' (Employee Id: Empp201, Email Id: john54321@mailinator.com). There are 'Active' and 'Inactive' buttons. Below this is a 'Holiday Group' configuration section. The 'Holiday Group Name' field is empty with a message 'Holiday group is not assigned yet.'. The 'Holiday Group' dropdown is set to 'Group A'. A 'SAVE' button is highlighted with a red box and labeled 'h'. Below this is a table titled 'Group A - Holidays' with a red box around it and labeled 'g'. The table has columns: Action, Holiday Group, Holiday, Date, and Description. It contains one record: Labor Day on 2016-Sep-05, described as 'This day is declared as a Labor holiday.'.

Action	Holiday Group	Holiday	Date	Description
	Group A	Labor Day	2016-Sep-05	This day is declared as a Labor holiday.

Figure 64

- g. A grid containing the holidays in the holiday group will be displayed
- h. Click **SAVE**

The employee will now be able to see holidays on the calendar plugin.

## 4. Self Service

Self-Service enables you to raise and handle leave requests. You can access your personal information, documents and leave details. You can also check the details of the employees working in your team. A Manager has the privilege to add Employees to Sentrifugo, provided he is their reporting manager.

### 4.1 Leave Requests

Please refer to *Section 3.4 - 3.8* (3.Leave Management).

### 4.2 How do I view My Details?

Please refer *Figure 65*

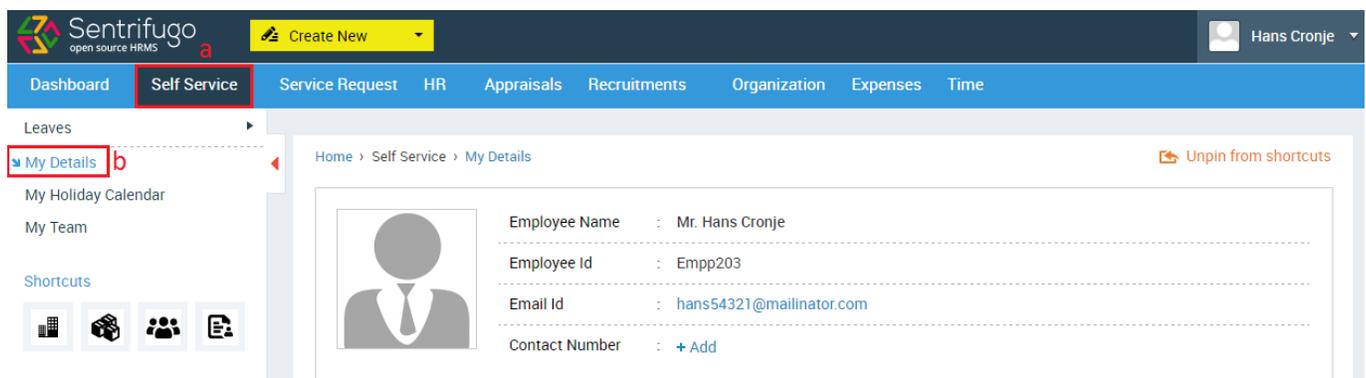


Figure 65

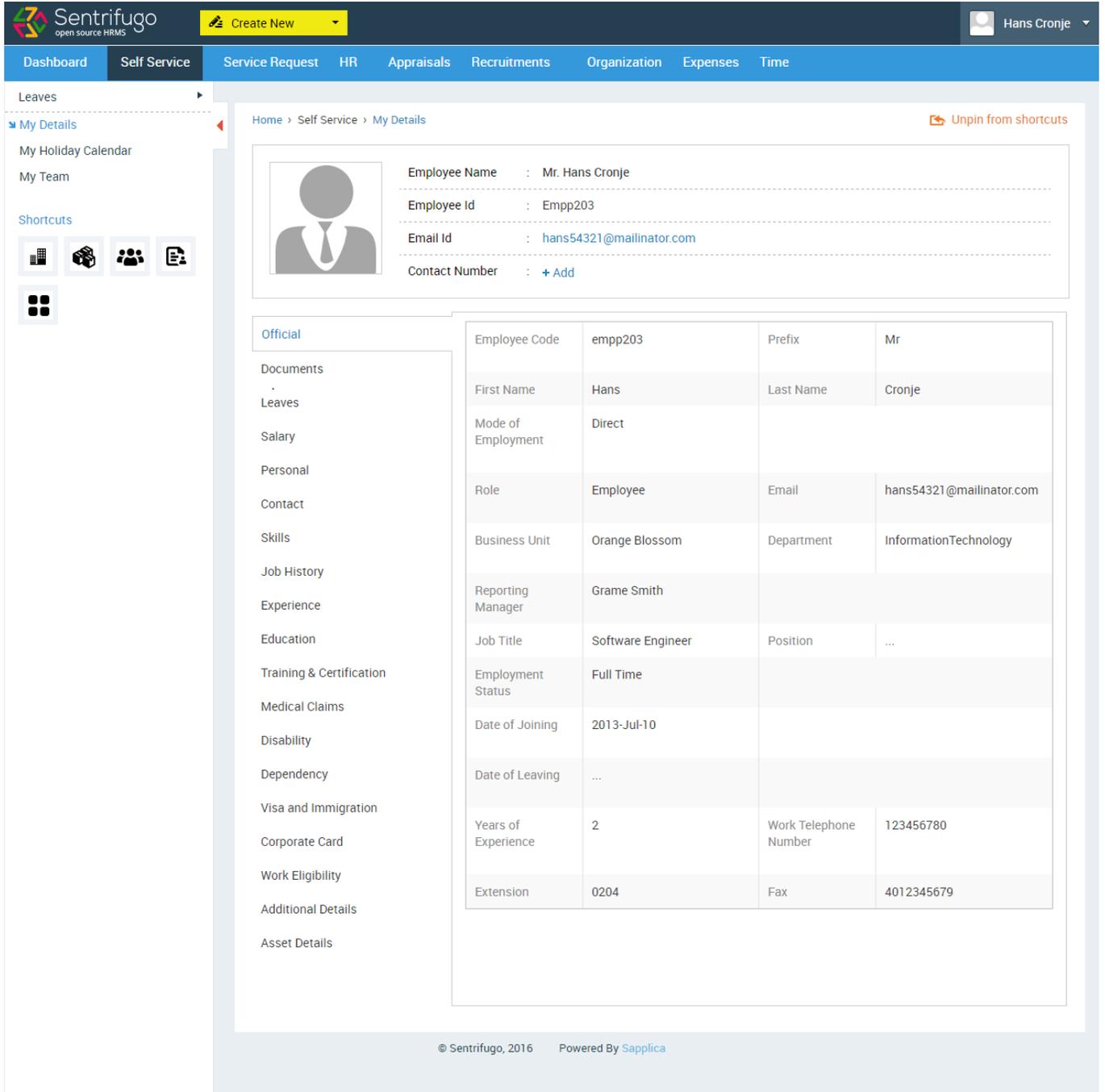
- a. Click **Self Service** in the top menu
- b. Click **My Details** on the left menu panel



Only the Super Admin/Management/HR has the privilege to add/edit/delete all employees' details.

## Official

Please refer Figure 66



Home > Self Service > My Details Unpin from shortcuts



Employee Name : Mr. Hans Cronje

Employee Id : Empp203

Email Id : [hans54321@mailinator.com](mailto:hans54321@mailinator.com)

Contact Number : [+ Add](#)

Employee Code	empp203	Prefix	Mr
First Name	Hans	Last Name	Cronje
Mode of Employment	Direct		
Role	Employee	Email	<a href="mailto:hans54321@mailinator.com">hans54321@mailinator.com</a>
Business Unit	Orange Blossom	Department	InformationTechnology
Reporting Manager	Grame Smith		
Job Title	Software Engineer	Position	...
Employment Status	Full Time		
Date of Joining	2013-Jul-10		
Date of Leaving	...		
Years of Experience	2	Work Telephone Number	123456780
Extension	0204	Fax	4012345679

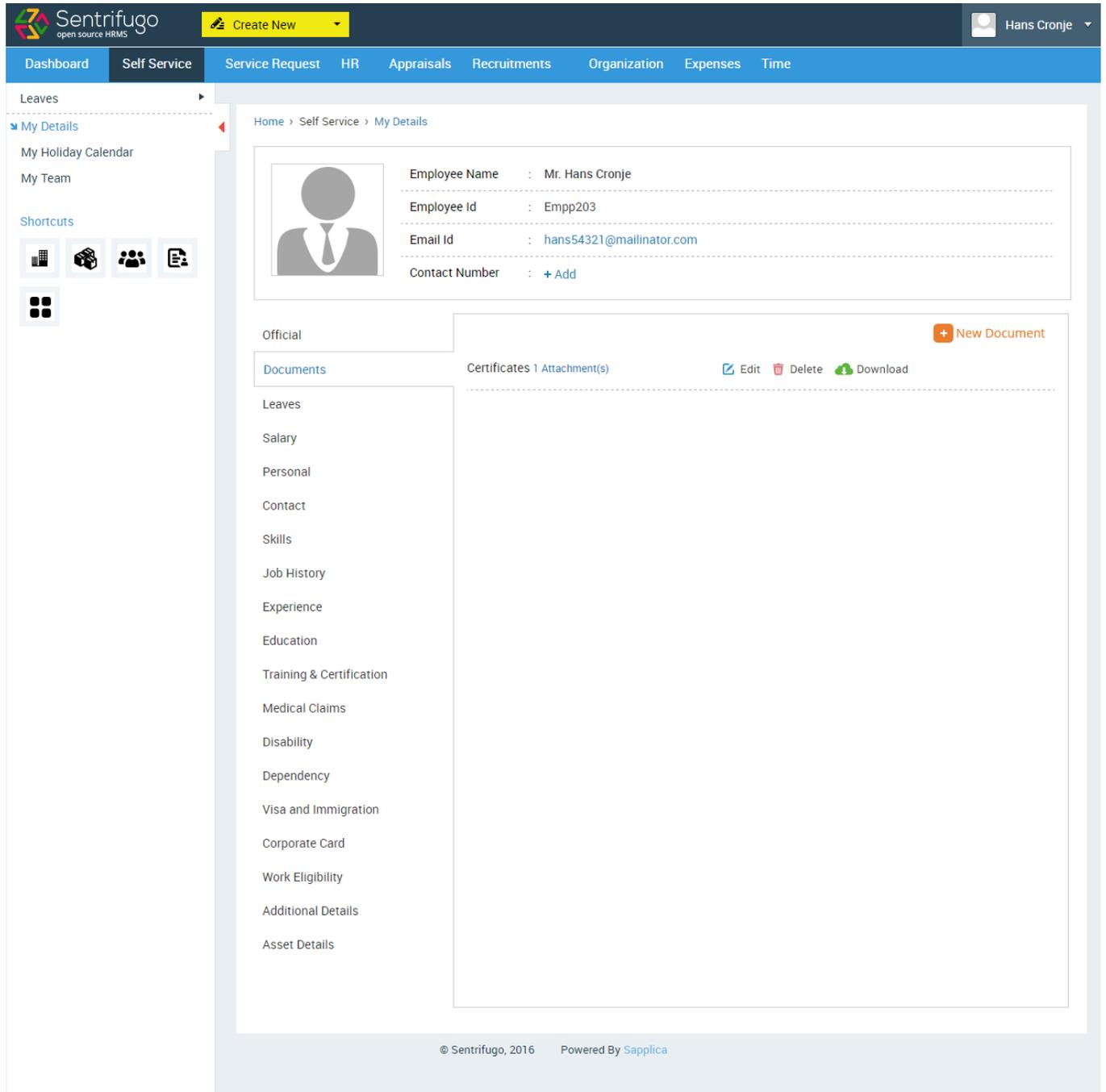
© Sentrifugo, 2016 Powered By [Saplica](#)

Figure 66

This option displays all your official details such as Employee ID, Email, and Business Unit etc. You cannot edit/add any detail **except** your contact number.

## Documents

Please refer Figure 67



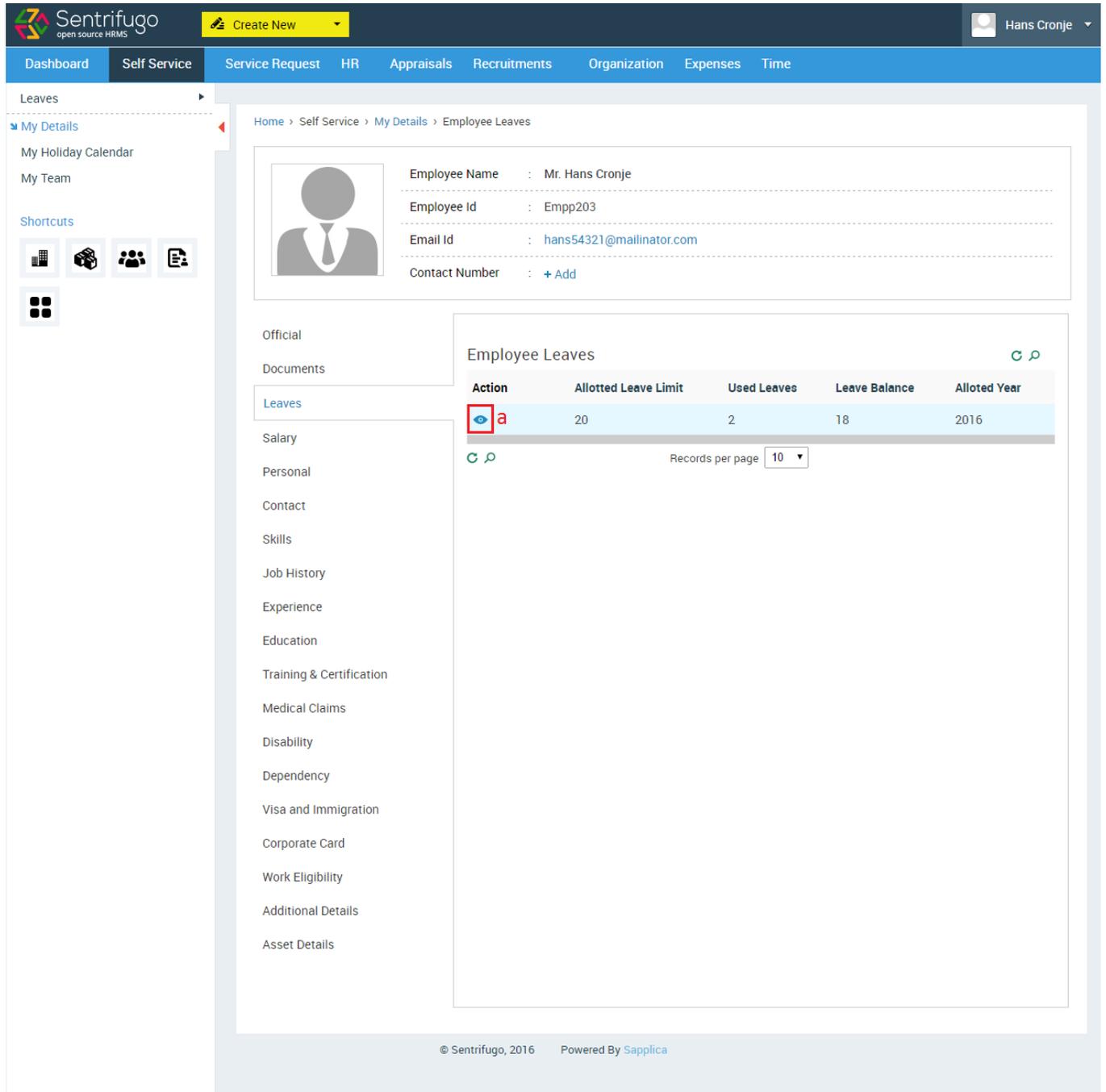
The screenshot shows the Sentrifugo HRMS interface. At the top, there is a navigation bar with the Sentrifugo logo, a 'Create New' button, and the user's name 'Hans Cronje'. Below this is a secondary navigation bar with tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. The main content area is titled 'Home > Self Service > My Details'. It features a profile card with a placeholder image and the following details: Employee Name: Mr. Hans Cronje, Employee Id: Empp203, Email Id: hans54321@mailinator.com, and Contact Number: + Add. Below the profile card is a section for 'Official Documents' with a 'New Document' button and options to Edit, Delete, or Download. A sidebar on the left lists various HRMS features: Leaves, My Details, My Holiday Calendar, My Team, Shortcuts, and a grid of icons. The footer of the page contains the copyright information: © Sentrifugo, 2016 Powered By Sapplica.

Figure 67

You can upload documents like birth certificate, degree certificate, tax proof documents etc.

## Leaves

Please refer Figure 68



Home > Self Service > My Details > Employee Leaves

Employee Name : Mr. Hans Cronje  
 Employee Id : Empp203  
 Email Id : hans54321@mailinator.com  
 Contact Number : + Add

Action	Allotted Leave Limit	Used Leaves	Leave Balance	Allotted Year
 a	20	2	18	2016

Records per page: 10

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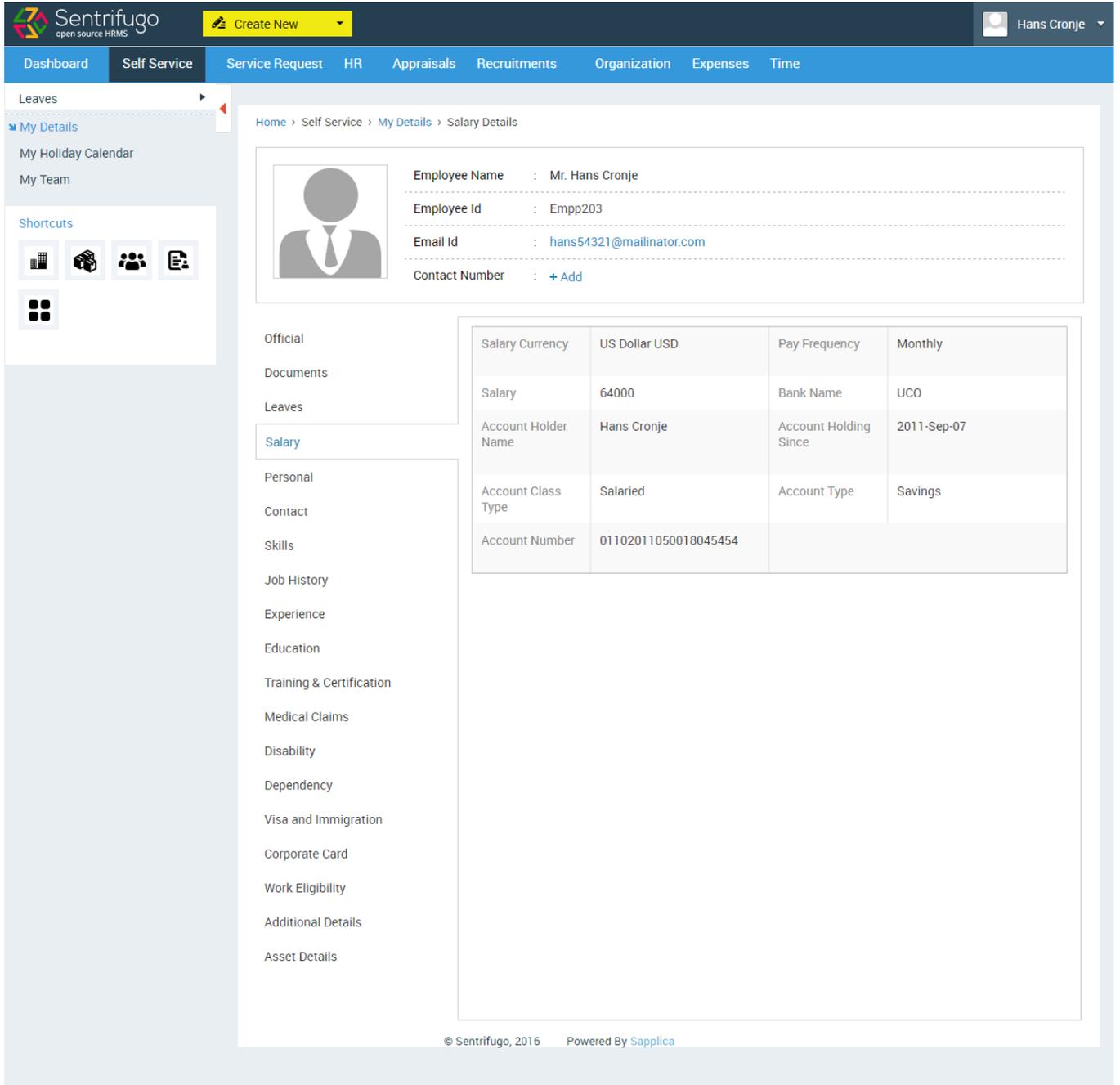
Figure 68

You can view the leave limit, number of used leaves and the leave balance for a particular year.

- a. Click the view icon to check the break-up of your leaves

## Salary

Please refer Figure 69



Home > Self Service > My Details > Salary Details

Employee Name : Mr. Hans Cronje

Employee Id : Empp203

Email Id : [hans54321@mailinator.com](mailto:hans54321@mailinator.com)

Contact Number : + Add

Salary Currency	US Dollar USD	Pay Frequency	Monthly
Salary	64000	Bank Name	UCO
Account Holder Name	Hans Cronje	Account Holding Since	2011-Sep-07
Account Class Type	Salaried	Account Type	Savings
Account Number	01102011050018045454		

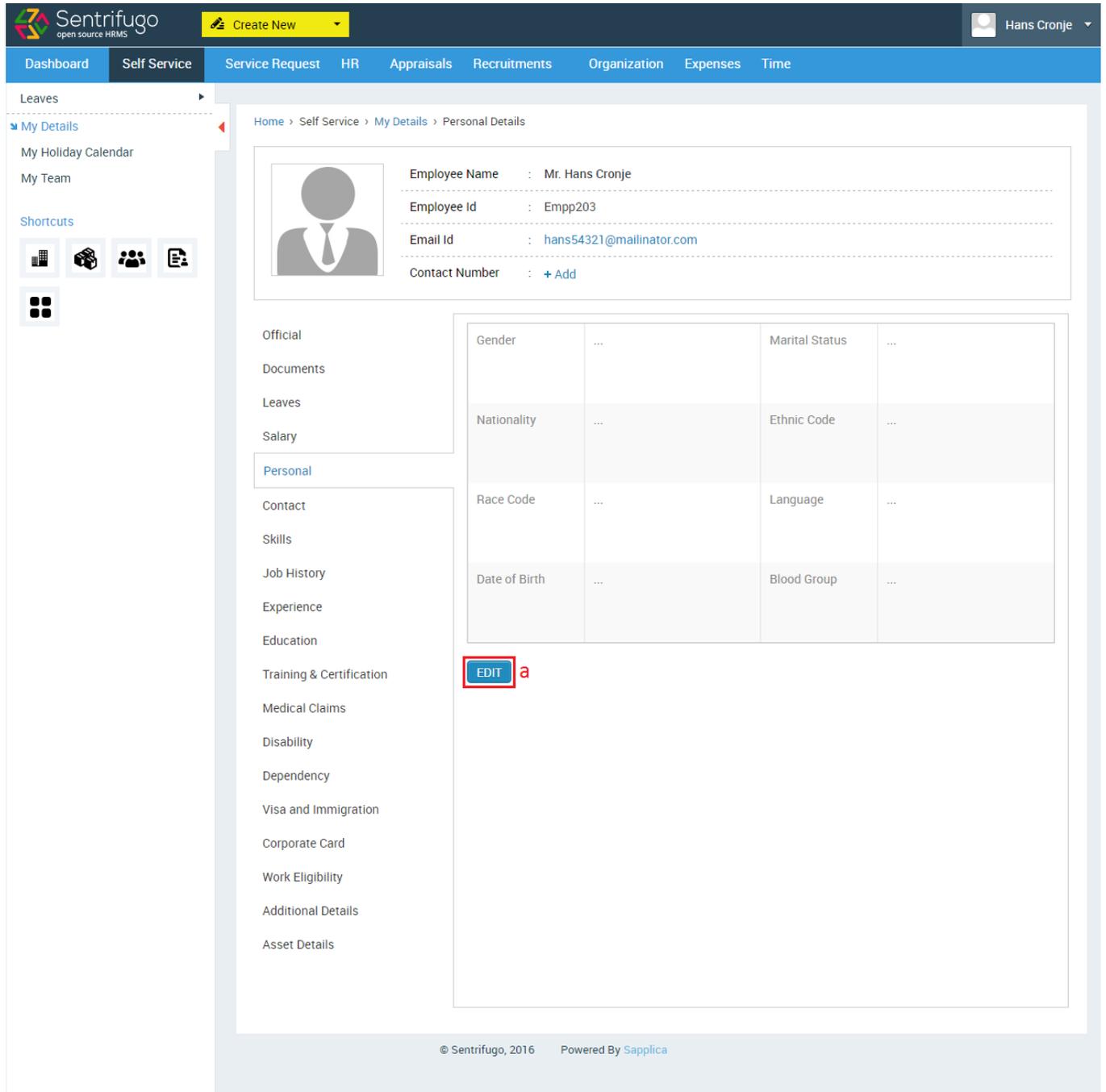
© Sentrifugo, 2016 Powered By Sapplica

Figure 69

You can view your salary and account details.

## Personal

Please refer Figure 70



Home > Self Service > My Details > Personal Details

Employee Name : Mr. Hans Cronje

Employee Id : Empp203

Email Id : hans54321@mailinator.com

Contact Number : + Add

Gender	...	Marital Status	...
Nationality	...	Ethnic Code	...
Race Code	...	Language	...
Date of Birth	...	Blood Group	...

**EDIT** a

© Sentrifugo, 2016 Powered By Sapplica

Figure 70

- a. Click **Edit icon** to add or modify any details

You can add or edit details for other submenu options like **Contact, Skills, Job History, and Education** etc.

The submenu options appear depending on the **Employee Configuration options** selected by the **Super Admin/Management/HR**. Please refer section [6.5 How do I add Employee Configuration tabs?](#)

### 4.3 How do I view My Holiday Calendar?

Please refer Figure 71

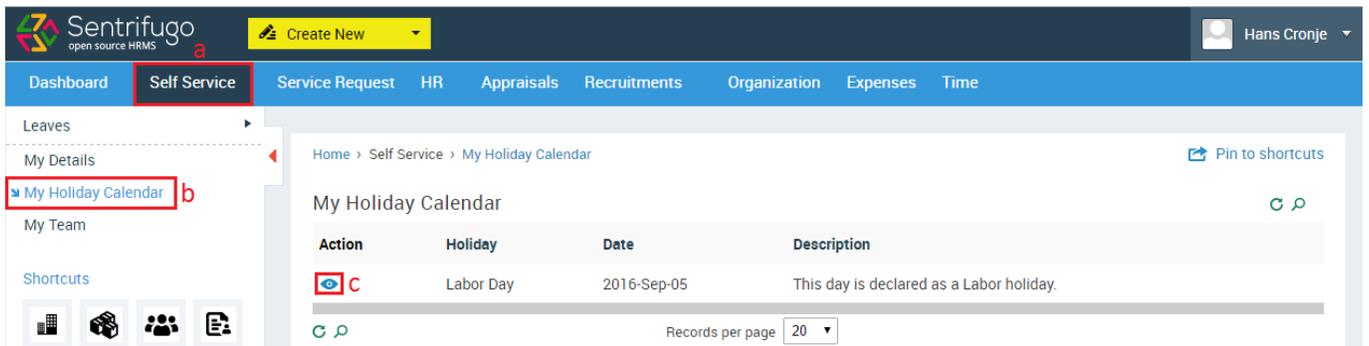


Figure 71

- Click **Self Service** in the top menu
- Click **My Holiday Calendar** on the left menu panel
- Click **View** icon in the Action column to view each holiday's details

### 4.4 How do I view My Team details?

This option will appear only for users who have employees reporting to them.

Please refer Figure 72

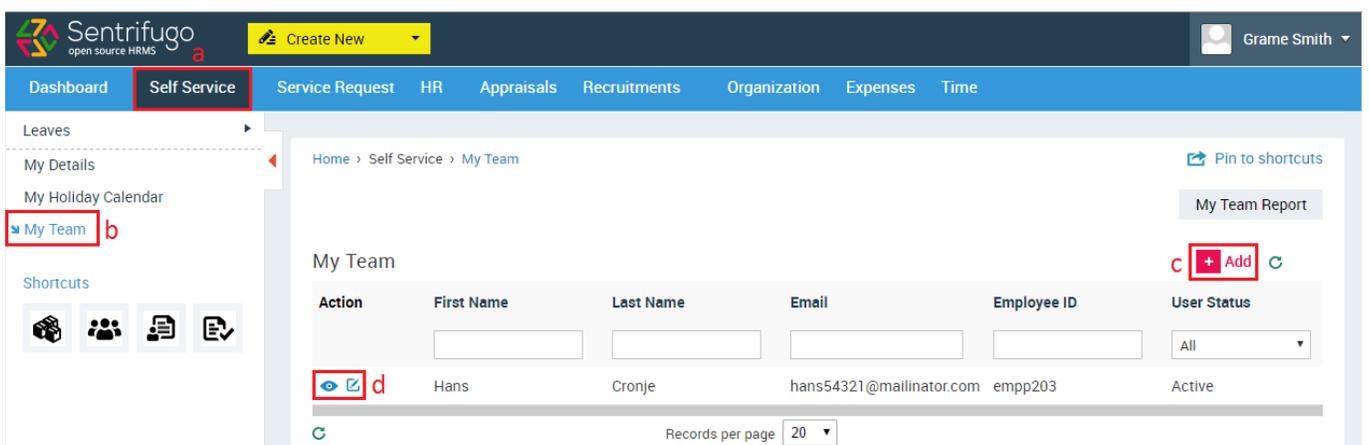


Figure 72

- Click **Self Service** in the top menu
- Click **My Team** on the left menu panel

c. Click **+Add** button to add an employee to your team (Refer section 1.4.2 Adding Other Employees)

Or

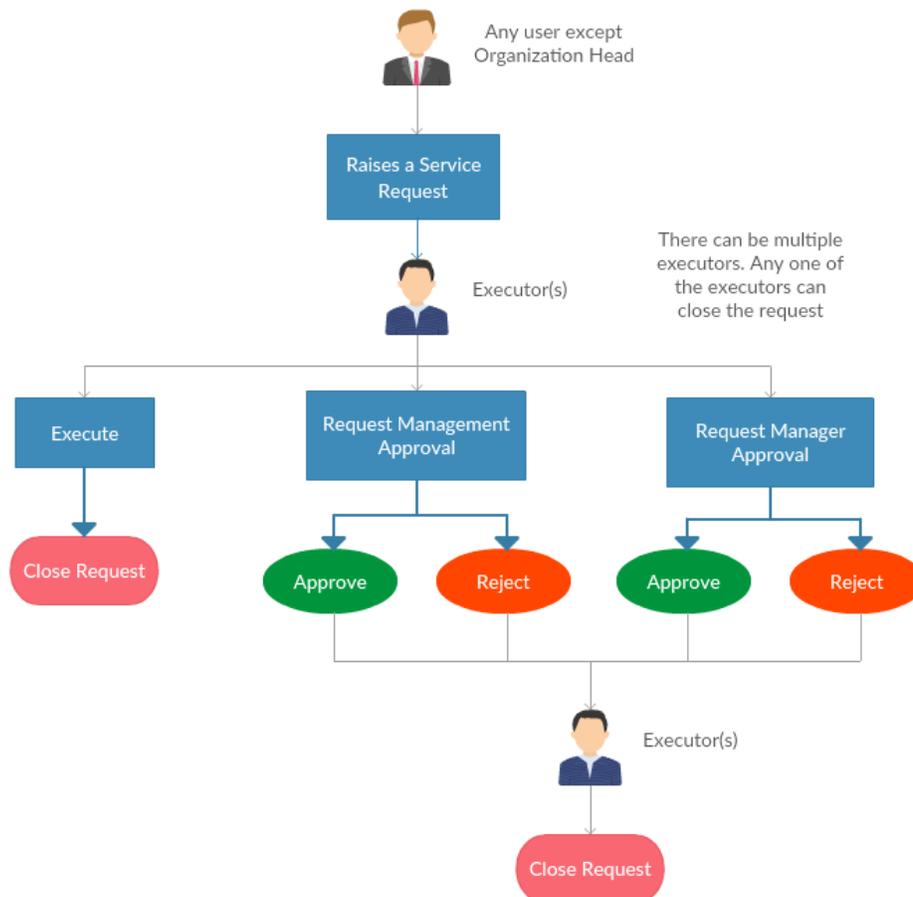
d. Click **View/Edit** icon to view or edit employee details



Managers can only add employees to their team in other words they have to be the employees' reporting manager.

## 5. Service Request

Service Request provides access to key services and information which are required by the employees. Configure the service request workflow without coding or scripting. You can raise and handle service requests. Below is the service request process flowchart.



### Description:

- A User (Any User who has a reporting manager) raises a service request.
- The Executor(s), Viewer(s) and the User will receive an email notification.
- The Executor has 3 options:
  - He/she can execute and close the service request
  - Request for Management approval
  - Request for User's manager's approval
- The actual execution takes place offline
- If the Executor has requested for either User's Reporting Manager or Management's approval, then the request will only be closed once one/both of them have approved. The Reporting Manager or Management will receive an email notification if an approval is sought from them by the executor(s).

## 5.1 How do I create Service Request Categories?

Please refer Figure 73

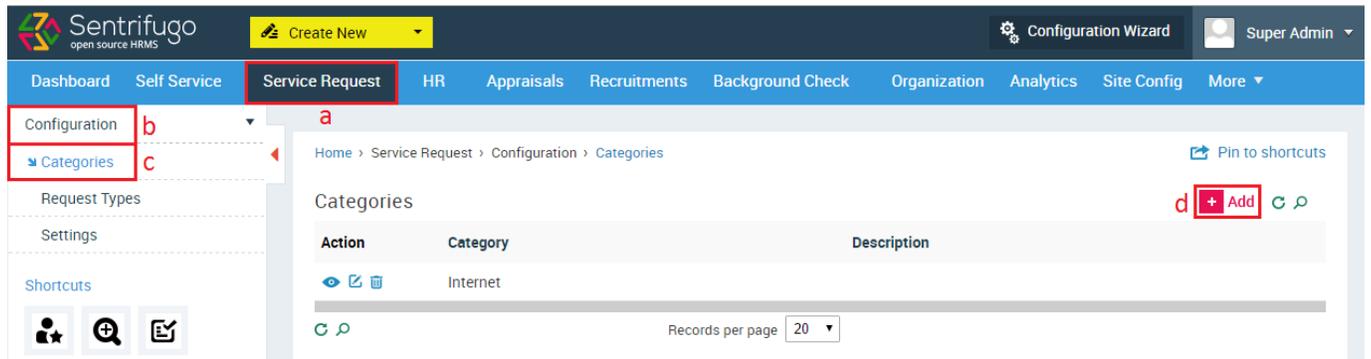


Figure 73

- a. Click **Service Request** in the top menu
- b. Click **Configuration** on the left menu panel
- c. Click **Categories** in the submenu
- d. Click **+Add** button on the right side

Please refer Figure 74

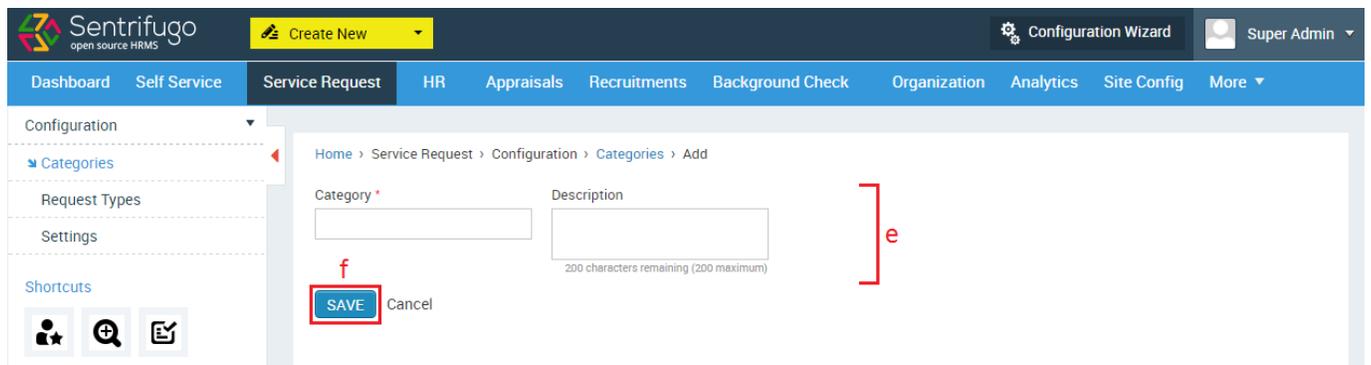


Figure 74

- e. Enter the Required details
- f. Click **SAVE** button

## 5.2 How do I create Service Request Types?

Please refer Figure 75

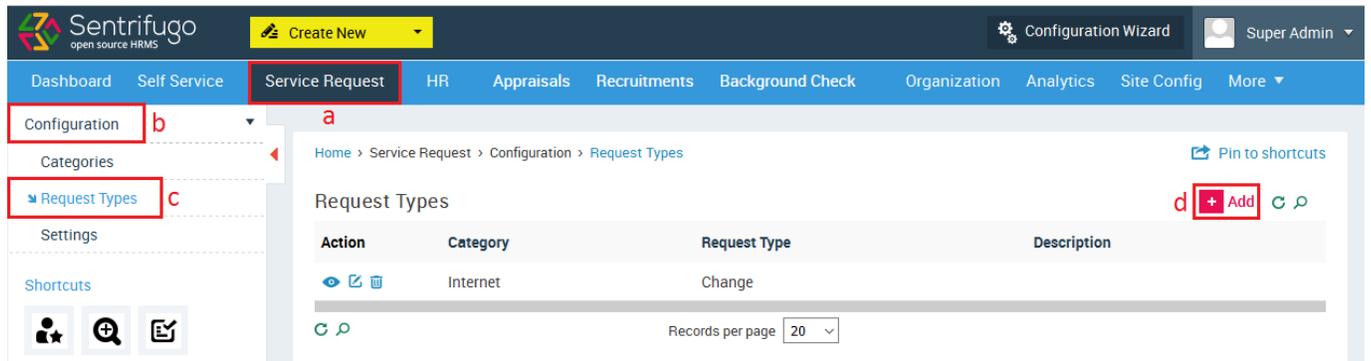


Figure 75

- a. Click on the Service Request in the top menu
- b. Click **Configuration** on the left side panel
- c. Click **Request Type** submenu
- d. Click **+Add** button on the right side

Please refer Figure 76

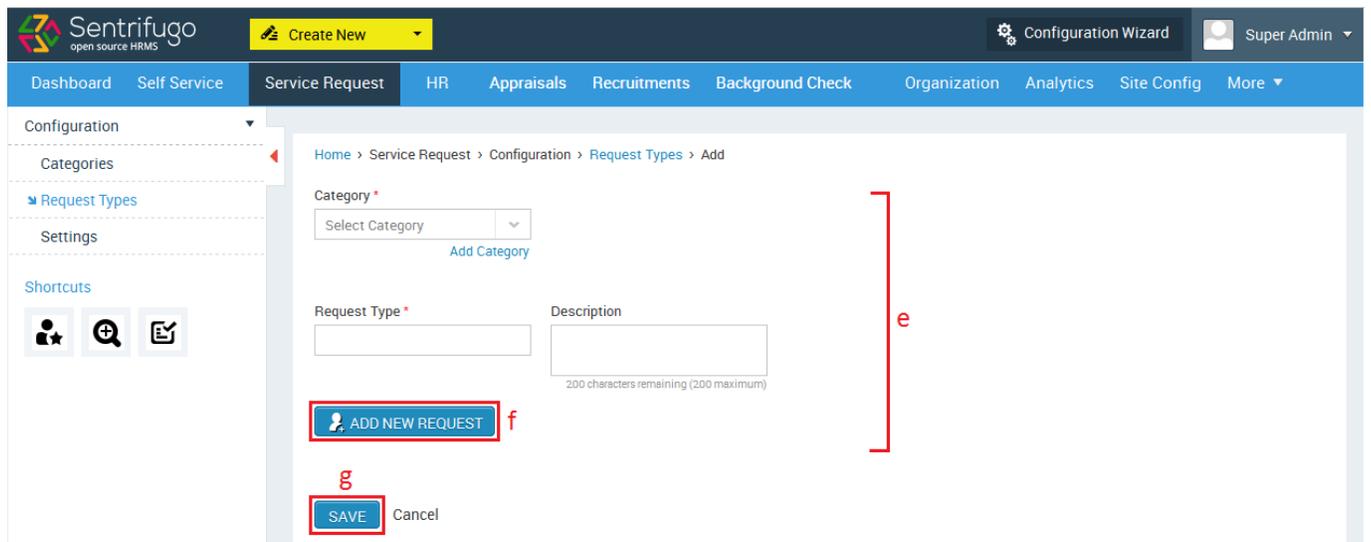


Figure 76

- e. Enter the Required details
- f. Click **ADD NEW REQUEST** to add more requests in the same category
- g. Click **SAVE** button

## 5.3 How do I configure Service Request settings?

Please refer Figure 77

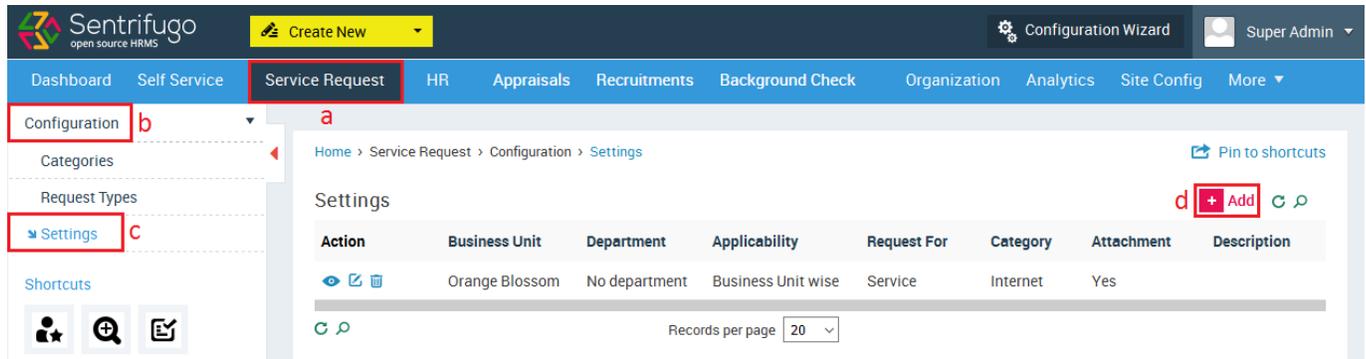


Figure 77

- a. Click **Service Request** in the top menu
- b. Click **Configuration** left menu panel
- c. Click **Settings** in the submenu
- d. Click **+Add** button on the right side

Please refer Figure 78

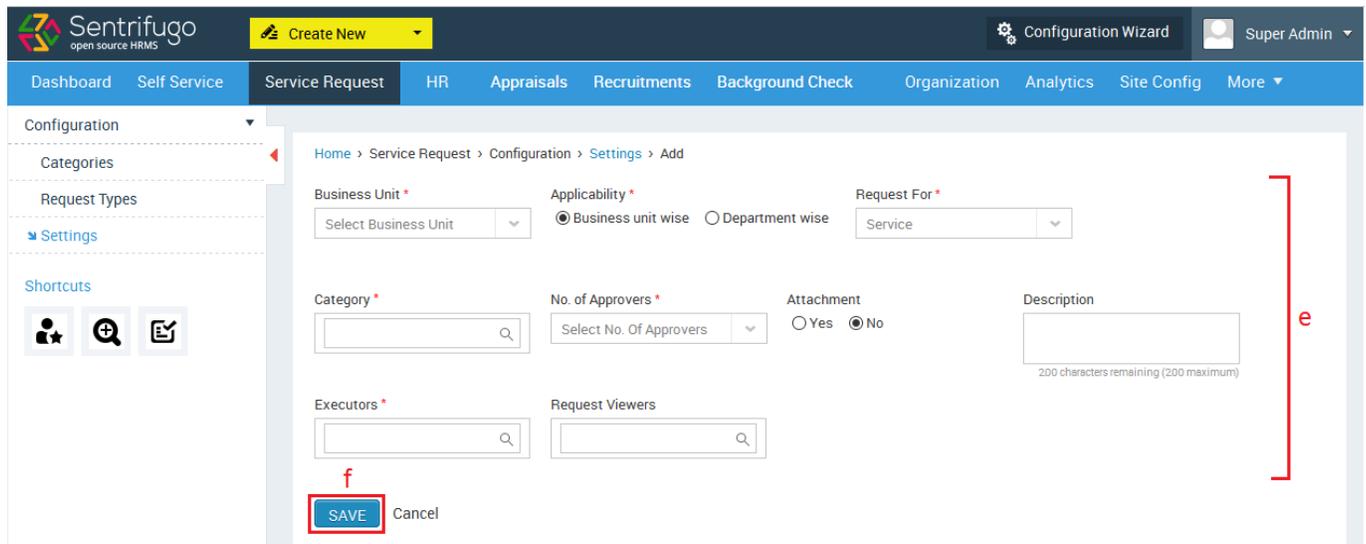


Figure 78

- e. Enter the Required details
- f. Click **SAVE** button

## 5.4 Who are Approvers, Executors and Viewers?

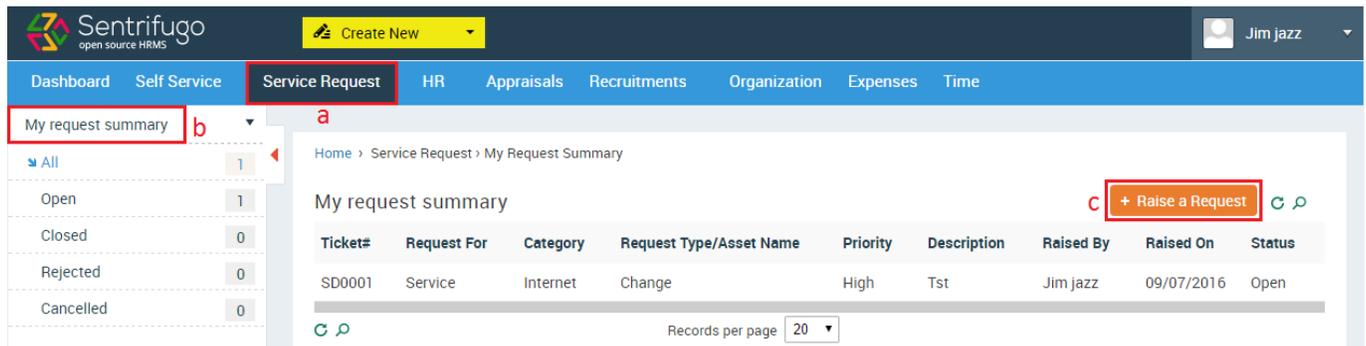
**Approvers** \*Management\*: They are responsible for providing approval for service requests. Executor(s) send a request for approval to the Approver(s). You can have a maximum of 3 approvers and a minimum of 1 approver.

**Executors** \*All roles except Management\*: They are responsible for executing the service request. The actual execution takes place offline. You can have any number of executors.

**Request Viewers** \*All roles except Management\*: They don't have any responsibility in the service request process. They can only view the actions taken by the executors and approvers via email notifications. You can have any number of viewers.

## 5.5 How do I raise a Service Request?

Please refer Figure 79

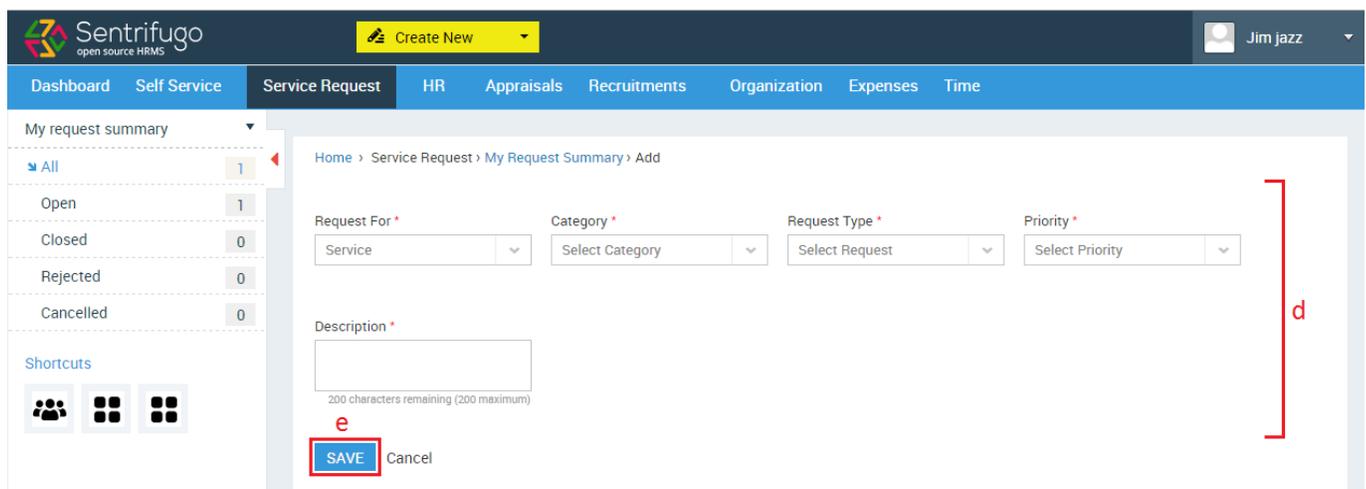


The screenshot shows the Sentrifugo interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request' (highlighted with 'a'), 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. On the left, a sidebar shows 'My request summary' (highlighted with 'b') with a dropdown menu containing 'All' (1), 'Open' (1), 'Closed' (0), 'Rejected' (0), and 'Cancelled' (0). The main content area shows 'My request summary' with a '+ Raise a Request' button (highlighted with 'c') and a table of requests. The table has columns: Ticket#, Request For, Category, Request Type/Asset Name, Priority, Description, Raised By, Raised On, and Status. One row is visible: SD0001, Service, Internet, Change, High, Tst, Jim jazz, 09/07/2016, Open. Below the table is a 'Records per page' dropdown set to 20.

Figure 79

- Click **Service Request** in the top menu
- Click **My request summary** on the left side panel
- Click **+Add** button on the right side

Please refer Figure 80



The screenshot shows the 'Add' form for a Service Request. The top navigation bar is the same as in Figure 79. The left sidebar is the same. The main content area shows the 'Add' form with fields: 'Request For \*' (Service), 'Category \*' (Select Category), 'Request Type \*' (Select Request), and 'Priority \*' (Select Priority). Below these is a 'Description \*' text area with a character count: '200 characters remaining (200 maximum)'. At the bottom, there is a 'SAVE' button (highlighted with 'e') and a 'Cancel' link. A red bracket on the right side of the form is labeled 'd'.

Figure 80

- d. Fill in the required details
- e. Click **SAVE** button

## 5.6 How do I view my Service Requests?

Please refer Figure 81

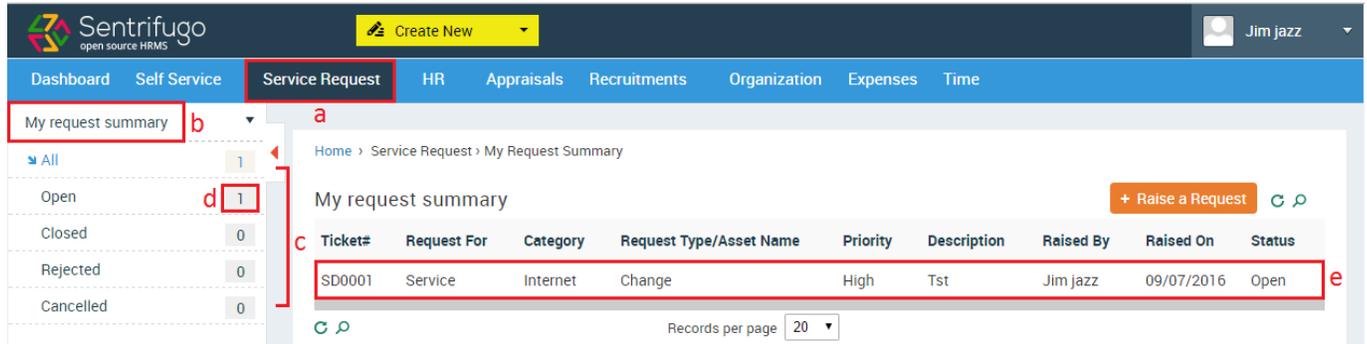


Figure 81

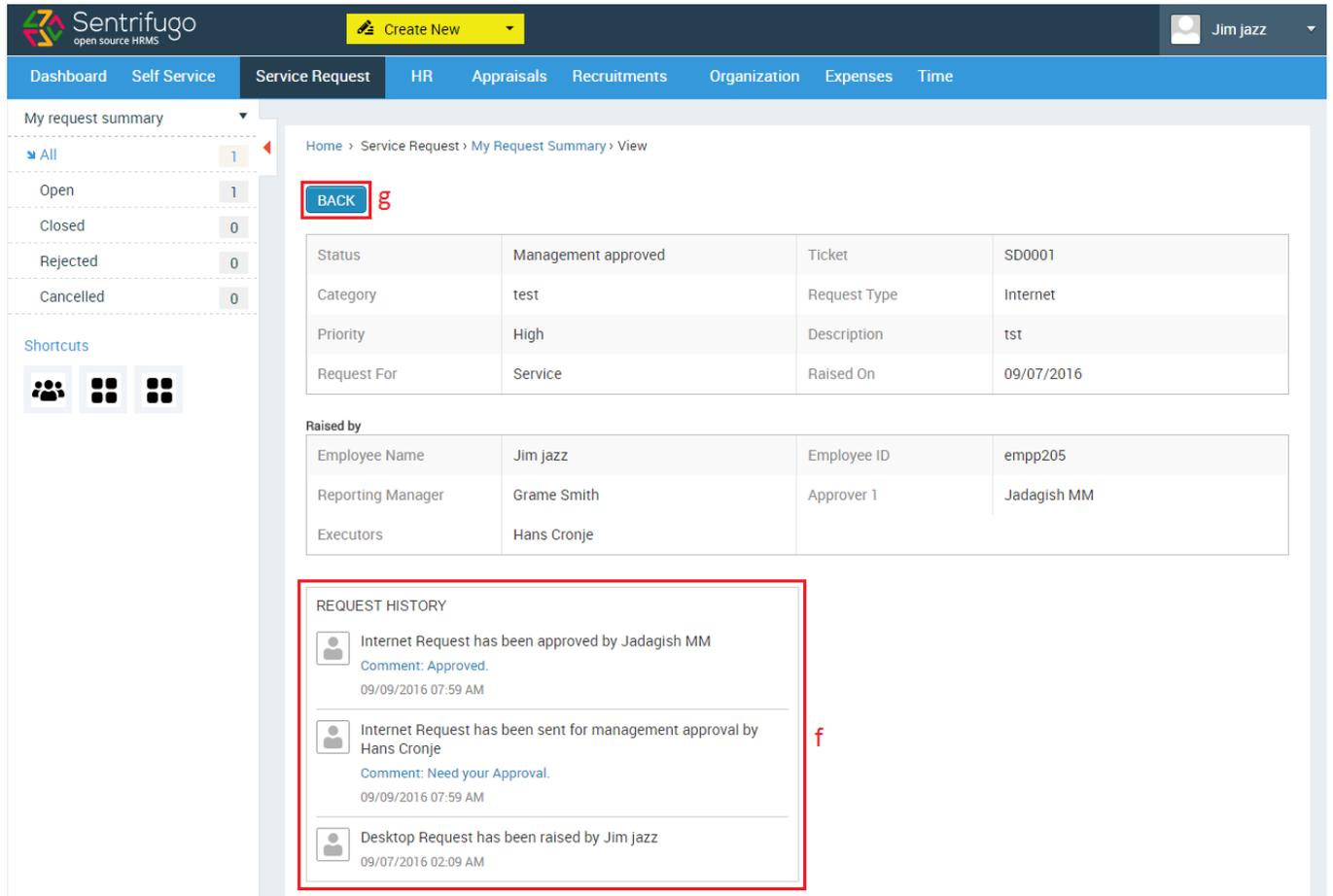
- a. Click **Service Request** in the top menu
- b. Click **My request summary** on the left menu panel

Service Requests have been categorized on basis of their statuses:

- All
- Open
- Closed
- Rejected
- Cancelled

- c. Click on the category you would like to view.
- d. Number of tickets present in each category
- e. Click on any ticket record to view the details

Please refer Figure 82



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. The user 'Jim jazz' is logged in. The 'Service Request' section is active, showing 'My Request Summary' with a 'View' link. A 'BACK' button is highlighted with a red box and labeled 'g'. The main content area displays request details in a table format:

Status	Management approved	Ticket	SD0001
Category	test	Request Type	Internet
Priority	High	Description	tst
Request For	Service	Raised On	09/07/2016

Below the details is a 'Raised by' section:

Employee Name	Jim jazz	Employee ID	empp205
Reporting Manager	Grame Smith	Approver 1	Jadagish MM
Executors	Hans Cronje		

The 'REQUEST HISTORY' section is highlighted with a red box and labeled 'f'. It contains three entries:

- Internet Request has been approved by Jadagish MM  
Comment: Approved.  
09/09/2016 07:59 AM
- Internet Request has been sent for management approval by Hans Cronje  
Comment: Need your Approval.  
09/09/2016 07:59 AM
- Desktop Request has been raised by Jim jazz  
09/07/2016 02:09 AM

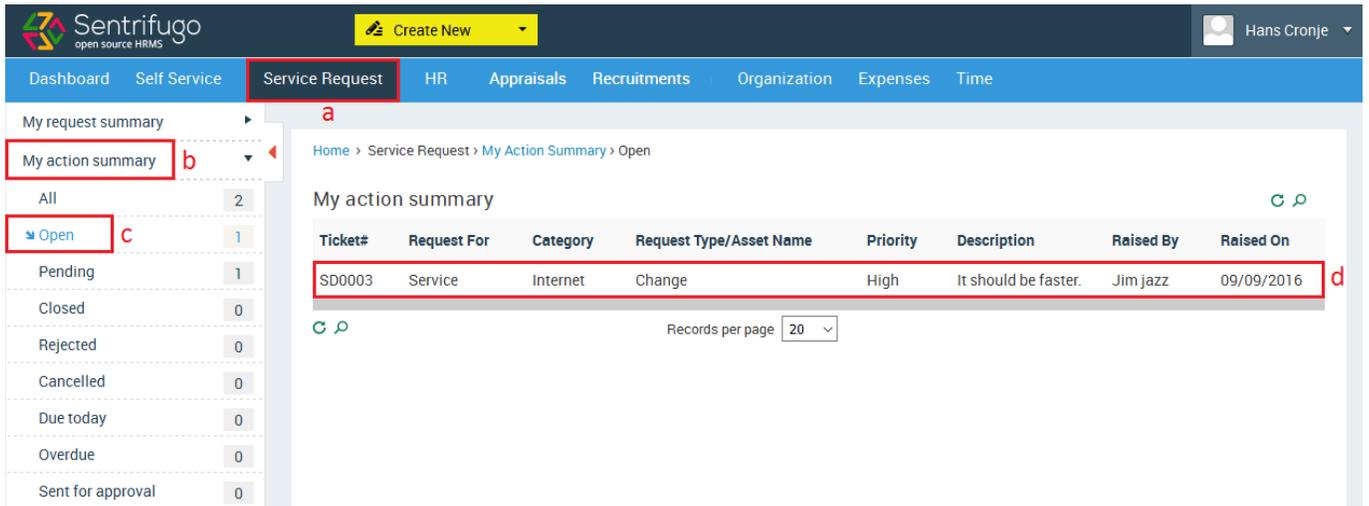
Figure 82

- f. You can view the service request history here
- g. Click **BACK** to return to the service request grid

## 5.7 How do I execute a Service Request?

If you have been configured as the executor or one of the executors for a service request category, then you will receive an email when an employee raises a request (Provided the executor and employee belong to the same Business Unit).

Please refer Figure 83



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request' (highlighted with 'a'), 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. The left sidebar shows 'My request summary' and 'My action summary' (highlighted with 'b'). Under 'My action summary', the 'Open' option is selected (highlighted with 'c'). The main content area displays a table of 'My action summary' records. The first record is highlighted with 'd':

Ticket#	Request For	Category	Request Type/Asset Name	Priority	Description	Raised By	Raised On
SD0003	Service	Internet	Change	High	It should be faster.	Jim jazz	09/09/2016

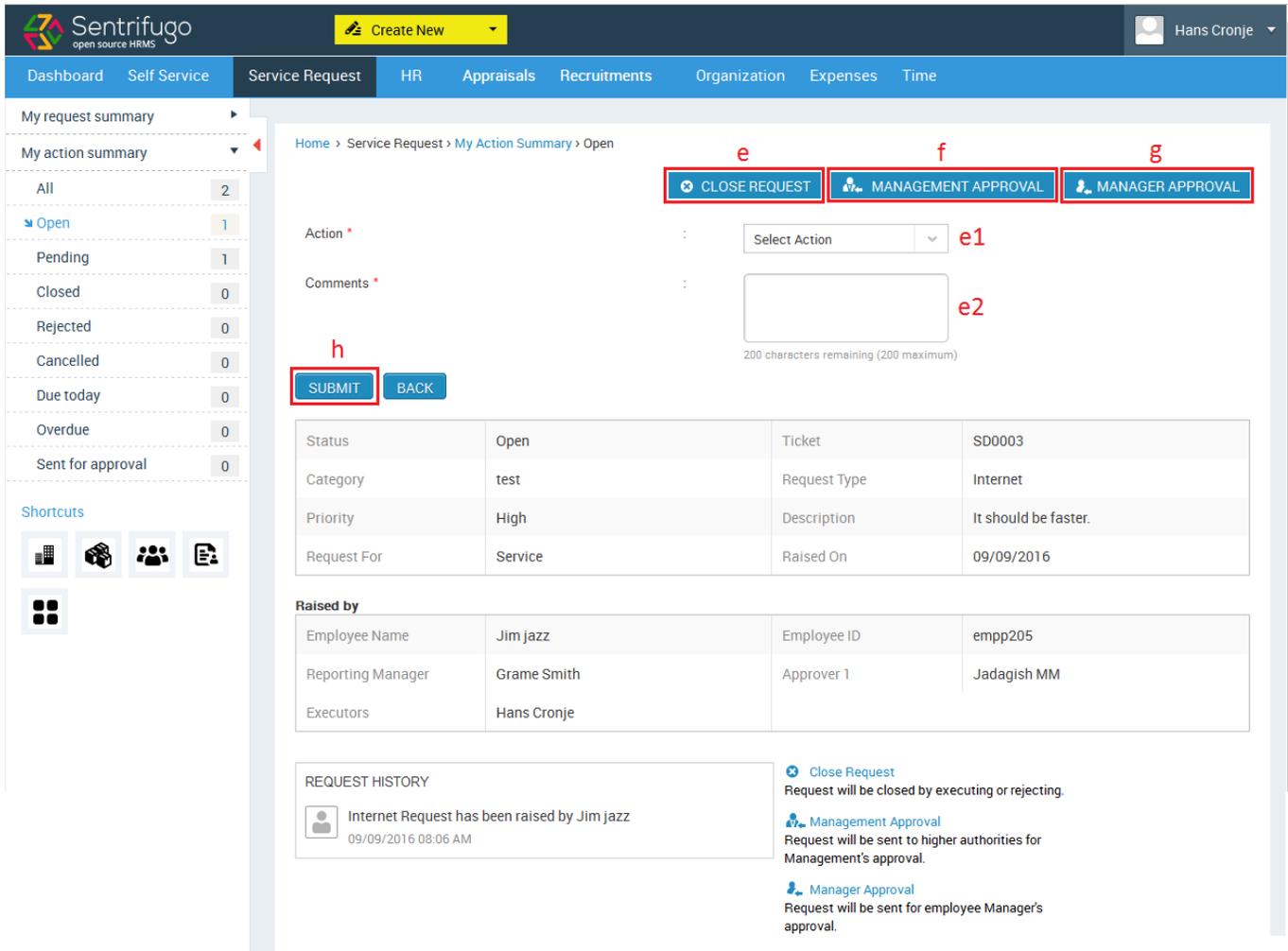
Figure 83

- Click **Service Request** in the top menu
- Click **My action summary** on the left menu panel
- Click **Open** in the submenu
- Click on any ticket record to view the details



The actual execution takes place offline.

Please refer Figure 84



The screenshot shows the Sentrifugo Service Request interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. The user is logged in as 'Hans Cronje'. The left sidebar shows 'My request summary' and 'My action summary' with counts for various statuses: All (2), Open (1), Pending (1), Closed (0), Rejected (0), Cancelled (0), Due today (0), Overdue (0), and Sent for approval (0). The main content area shows a service request form with the following details:

- Buttons:** 'CLOSE REQUEST' (e), 'MANAGEMENT APPROVAL' (f), 'MANAGER APPROVAL' (g), and 'SUBMIT' (h).
- Action:** A dropdown menu labeled 'Select Action' (e1).
- Comments:** A text input field (e2) with a 200-character limit.
- Request Details Table:**

Status	Open	Ticket	SD0003
Category	test	Request Type	Internet
Priority	High	Description	It should be faster.
Request For	Service	Raised On	09/09/2016
- Raised by Table:**

Employee Name	Jim jazz	Employee ID	emp205
Reporting Manager	Grame Smith	Approver 1	Jadagish MM
Executors	Hans Cronje		
- REQUEST HISTORY:**
  - Internet Request has been raised by Jim jazz on 09/09/2016 08:06 AM.
  - Close Request:** Request will be closed by executing or rejecting.
  - Management Approval:** Request will be sent to higher authorities for Management's approval.
  - Manager Approval:** Request will be sent for employee Manager's approval.

Figure 84

- e. Click **Close request** button to approve/reject the request.
  - e1. Select an action (Approve/Reject)
  - e2. Provide comments.
- f. Request **Management Approval** for the service request (They will be the approver(s) selected while configuring the Service Request Settings)
- g. Request **Manager Approval** for the service request (The employee's reporting manager)
- h. Click **SUBMIT** button



Requests can be closed at any point by the executor, except when Management/Manager approval is pending

## 5.8 How do I approve a Service Request as Management (Approver)/Manager?

Please refer Figure 85

Home > Service Request > My Action Summary > To approve

My action summary

Ticket#	Request For	Category	Request Type/Asset Name	Priority	Description	Raised By	Raised On
SD0003	Service	Internet	Change	High	It should be faster.	Jim jazz	09/09/2016

Records per page: 20

Figure 85

- Click **Service Request** in the top menu
- Click **My Action Summary** on the left side panel
- Click **To approve** in the submenu
- Click on any ticket record to view the details

Please refer Figure 86

Action \* :

Comments \* :

Status	Pending approval at Jadagish MM	Ticket	SD0003
Category	test	Request Type	Internet
Priority	High	Description	It should be faster.
Request For	Service	Raised On	09/09/2016

Raised by

Employee Name	Jim jazz	Employee ID	empp205
Reporting Manager	Grame Smith	Approver 1	Jim Carol
Executors	Hans Cronje		

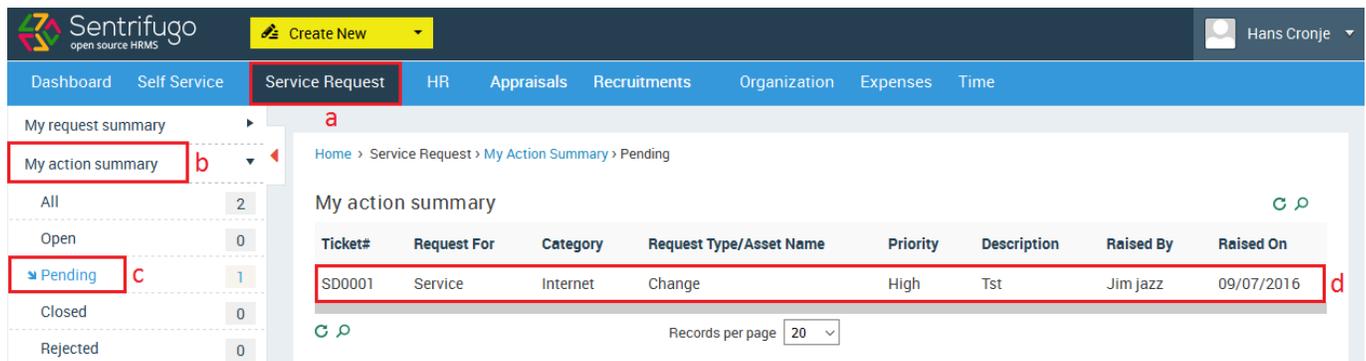
Figure 86

- e. Select any action (Approve/Reject)
- f. Provide comments
- g. Click **SUBMIT** button
- h. Click **BACK** button to return to the service request grid

## 5.9 How do I close a Service Request as an Executor?

If you have requested for approval from either the Management (Approver)/Manager, you will receive an email notification when they take an action.

Please refer Figure 87

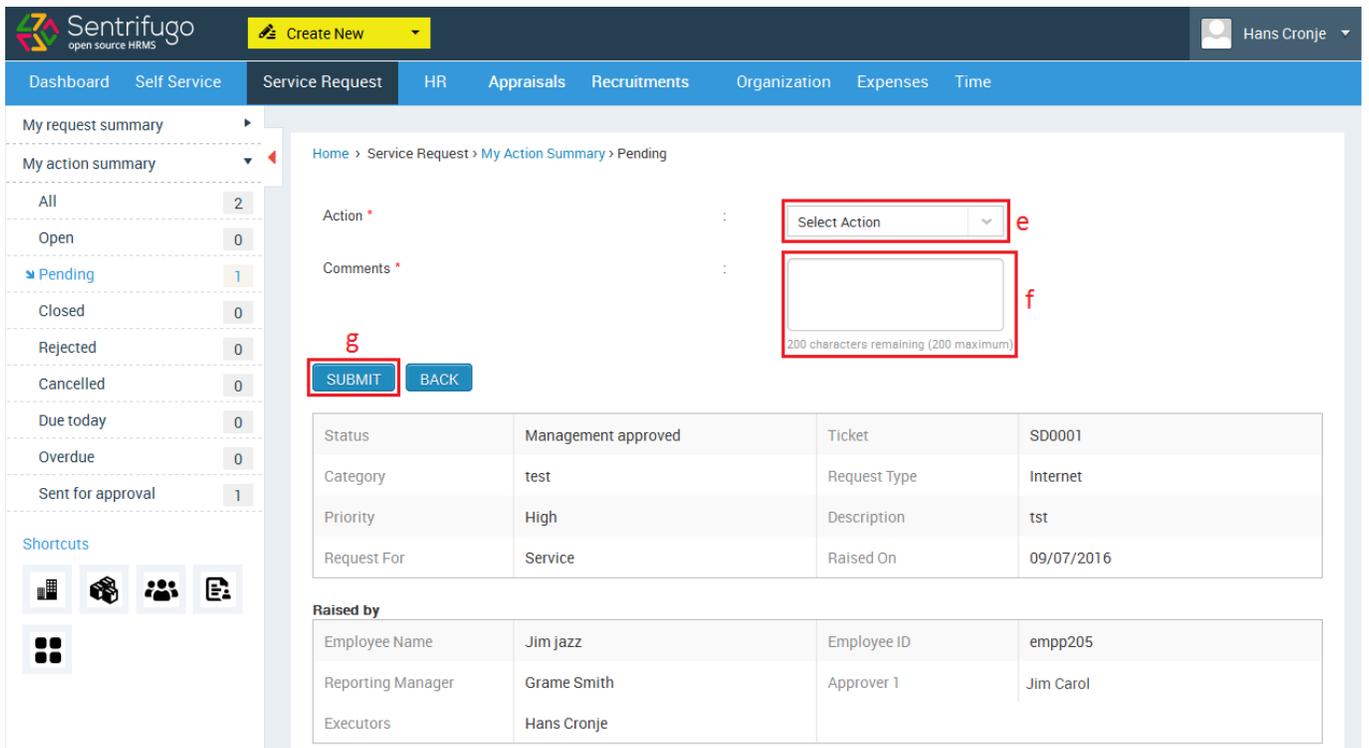


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. The 'Service Request' menu item is highlighted with a red box and labeled 'a'. Below the navigation bar, there is a left sidebar with 'My request summary' and 'My action summary' (labeled 'b'). Under 'My action summary', the 'Pending' option is highlighted with a red box and labeled 'c'. The main content area shows the 'My action summary' page with a table of records. The table has columns: Ticket#, Request For, Category, Request Type/Asset Name, Priority, Description, Raised By, and Raised On. A single record is shown with Ticket# SD0001, Request For Service, Category Internet, Request Type/Asset Name Change, Priority High, Description Tst, Raised By Jim jazz, and Raised On 09/07/2016. This record is highlighted with a red box and labeled 'd'. The page also shows a 'Records per page' dropdown set to 20.

Figure 87

- a. Click **Service Request** in the top menu
- b. Click **My action summary** on the left menu panel
- c. Click **Pending** in the submenu
- d. Click on any ticket record to view the details

Please refer Figure 88



Home > Service Request > My Action Summary > Pending

Action \* :  e

Comments \* :  f  
200 characters remaining (200 maximum)

**g**

Status	Management approved	Ticket	SD0001
Category	test	Request Type	Internet
Priority	High	Description	tst
Request For	Service	Raised On	09/07/2016

**Raised by**

Employee Name	Jim jazz	Employee ID	emp205
Reporting Manager	Grame Smith	Approver 1	Jim Carol
Executors	Hans Cronje		

Figure 88

- e. Select an action (Approve/Reject)
- f. Provide comments.
- g. Click **SUBMIT** button

## 6. HR

HR (Human Resource) deals with user, leave and holiday management configuration. It stores the employee data which includes personal, official, experience, documents, education, visa & immigration details etc.

### 6.1 Adding Employees

Please refer to section [1.4 How do I add employees to Sentrifugo?](#)

### 6.2 How do I manage Roles & Privileges?

Access to important data must be monitored and restricted to certain users only. Sentrifugo understands your need for security and enables you to protect your data from unauthorized access through the 'Access Control' feature.

By using the option **Roles & Privileges** in the module **HR**, each role group can be allowed or disallowed to add/delete/edit/view certain features. Only the **Super Admin & Management** role group can assign or deny privileges to users.

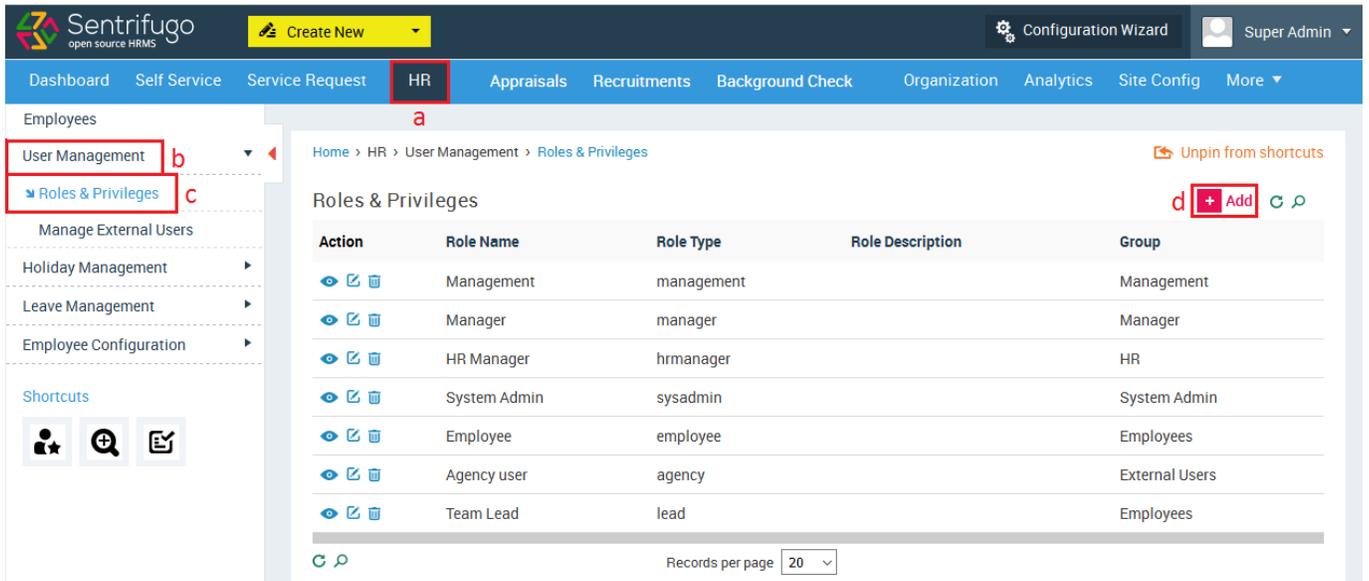
As mentioned earlier in section [1.1 What are the roles available in Sentrifugo?](#), there are 6 main role groups available by default in Sentrifugo:

- Management
- Manager
- HR
- Employee
- System Admin
- External User

Within each role group a maximum of 5 role groups can be created.

**To create a new role:**

*Please refer Figure 89*



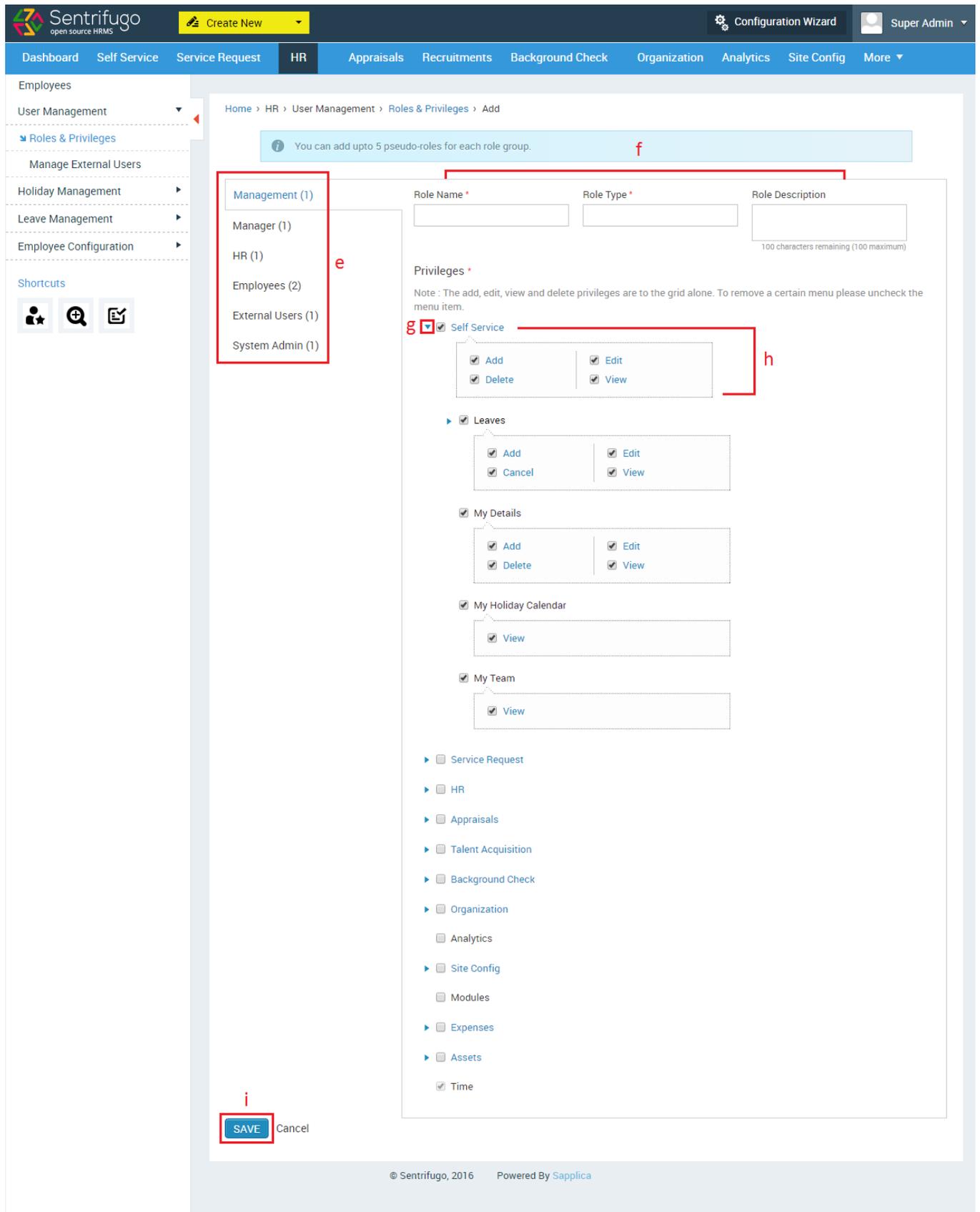
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The 'HR' menu item is highlighted with a red box and labeled 'a'. The left sidebar menu shows 'Employees' expanded, with 'User Management' highlighted with a red box and labeled 'b', and 'Roles & Privileges' highlighted with a red box and labeled 'c'. The main content area displays the 'Roles & Privileges' page, which includes a table of roles and a '+ Add' button highlighted with a red box and labeled 'd'. The table lists roles such as Management, Manager, HR Manager, System Admin, Employee, Agency user, and Team Lead, each with an 'Action' column containing icons for view, edit, and delete. The page also includes a 'Records per page' dropdown set to 20.

Action	Role Name	Role Type	Role Description	Group
	Management	management		Management
	Manager	manager		Manager
	HR Manager	hrmanager		HR
	System Admin	sysadmin		System Admin
	Employee	employee		Employees
	Agency user	agency		External Users
	Team Lead	lead		Employees

Figure 89

- a. Click **HR** in the top menu
- b. Click **User Management** on the left menu panel
- c. Click **Roles & Privileges** in the submenu
- d. Click **+Add** button on the right side

Please refer Figure 90



Home > HR > User Management > Roles & Privileges > Add

*f* You can add upto 5 pseudo-roles for each role group.

*e*

Management (1)  
 Manager (1)  
 HR (1)  
 Employees (2)  
 External Users (1)  
 System Admin (1)

Role Name \*      Role Type \*      Role Description  
 100 characters remaining (100 maximum)

Privileges \*

Note : The add, edit, view and delete privileges are to the grid alone. To remove a certain menu please uncheck the menu item.

*g*  Self Service *h*

Add       Edit  
 Delete       View

Leaves

Add       Edit  
 Cancel       View

My Details

Add       Edit  
 Delete       View

My Holiday Calendar

View

My Team

View

Service Request  
 HR  
 Appraisals  
 Talent Acquisition  
 Background Check  
 Organization  
 Analytics  
 Site Config  
 Modules  
 Expenses  
 Assets  
 Time

*i* **SAVE** Cancel

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Figure 90

- e. Click on the default role you want on the left side
- f. Fill in the required details
- g. Click on the triangle dropdown icon to view the privilege options
- h. Select the modules and their respective privileges you require for this role
- i. Click **SAVE** button

## 6.3 How do I add External Users?

External Users have limited access to information on Sentrifugo. There are 3 types of External Users in this application:

- Background Check Agency Users
- Recruitment Candidates
- External User (For any purpose suitable for your organization)

After adding an external user role (refer section [6.2 How do I manage Roles & Privileges?](#))

Please refer Figure 91

The screenshot shows the Sentrifugo HRMS interface. The top navigation bar has 'HR' highlighted with a red box 'a'. The left sidebar has 'User Management' highlighted with a red box 'b', and its submenu 'Manage External Users' is also highlighted with a red box 'c'. The main content area shows the 'Manage External Users' page with a breadcrumb trail 'Home > HR > User Management > Manage External Users'. There is a '+Add' button highlighted with a red box 'd'. Below the button is a table with the following data:

Action	User ID	Email	Role	Status
 	BGCK156	spect@mallinator.com	Agency user	Active

At the bottom of the table, there is a 'Records per page' dropdown set to '20'.

Figure 91

- a. Click **HR** in the top menu
- b. Click **User Management** on the left menu panel
- c. Click **Manage External Users** in the submenu
- d. Click **+Add** button on the right side

Please refer Figure 92

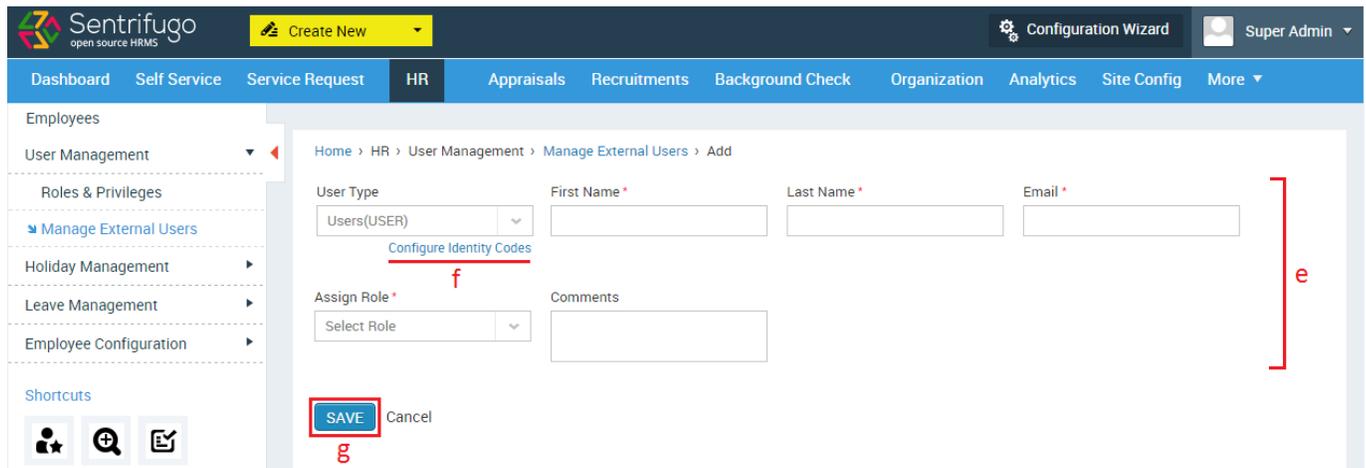


Figure 92

- e. Fill in the required details
- f. Click here to change the identity code
- g. Click **SAVE** button



External roles will have only the privilege to 'view'  
 Organization Details will populate in the drop down option  
 for field 'Assign Role'.

## 6.4 Holiday Management

Please refer section [3.11 - 3.13](#)

## 6.5 Leave Management

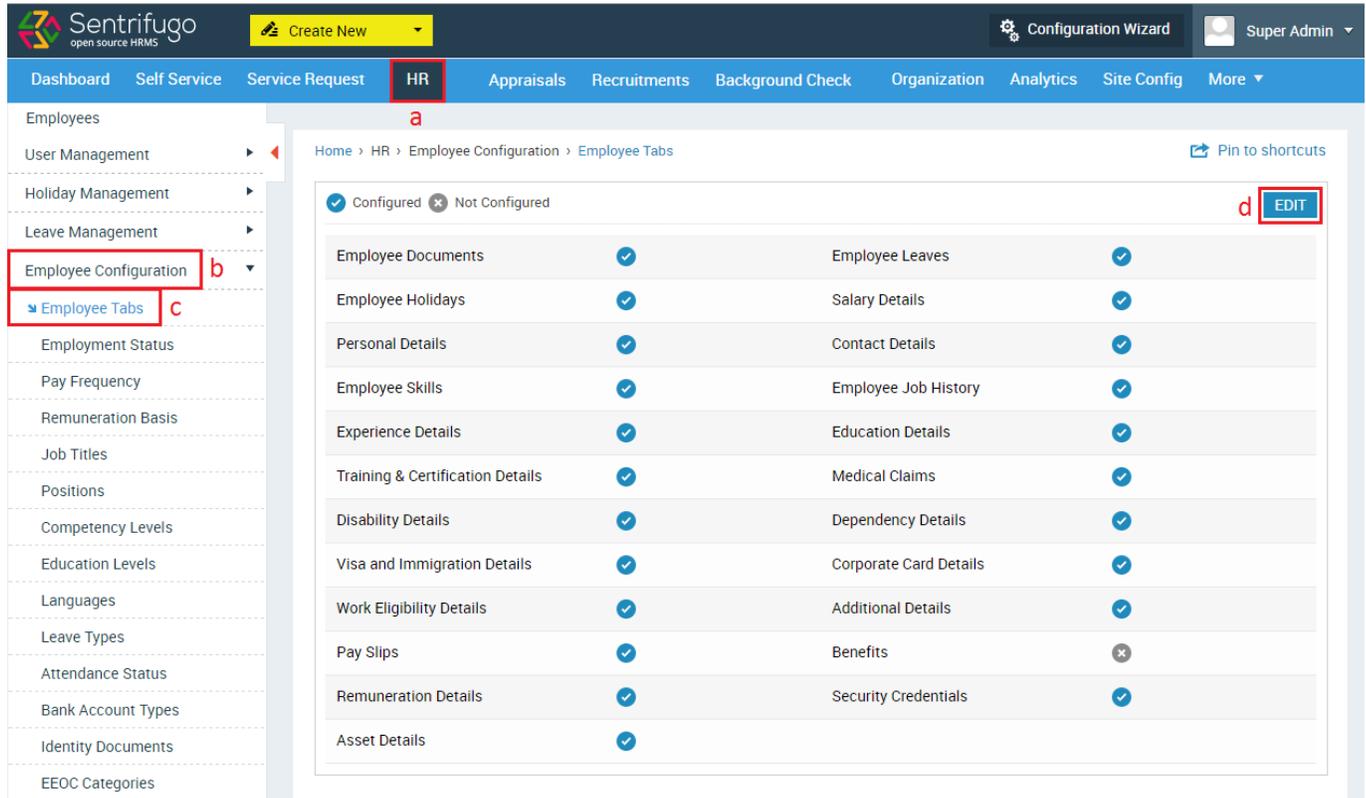
Please refer section [3. Leave Management](#)

## 6.6 Employee Configuration

This feature will let you choose the tabs such as salary details, holidays, documents etc. to be displayed in every employee record. You can also configure each tab and add details.

## 6.6.1 How do I select Employee Tabs?

Please refer Figure 93



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar menu lists various HR functions, with 'Employee Configuration' and its sub-item 'Employee Tabs' highlighted. The main content area displays the 'Employee Configuration' page, which includes a table of configuration items for employees. The 'EDIT' button in the top right corner of the table is highlighted.

Configured		Not Configured	
Employee Documents	✓	Employee Leaves	✓
Employee Holidays	✓	Salary Details	✓
Personal Details	✓	Contact Details	✓
Employee Skills	✓	Employee Job History	✓
Experience Details	✓	Education Details	✓
Training & Certification Details	✓	Medical Claims	✓
Disability Details	✓	Dependency Details	✓
Visa and Immigration Details	✓	Corporate Card Details	✓
Work Eligibility Details	✓	Additional Details	✓
Pay Slips	✓	Benefits	✗
Remuneration Details	✓	Security Credentials	✓
Asset Details	✓		

Figure 93

- Click **HR** in the top menu
- Click **Employee Configuration** on the left menu panel
- Click **Employee Tabs** in the submenu
- Click **Edit icon** to configure tabs for employees

Please refer Figure 94

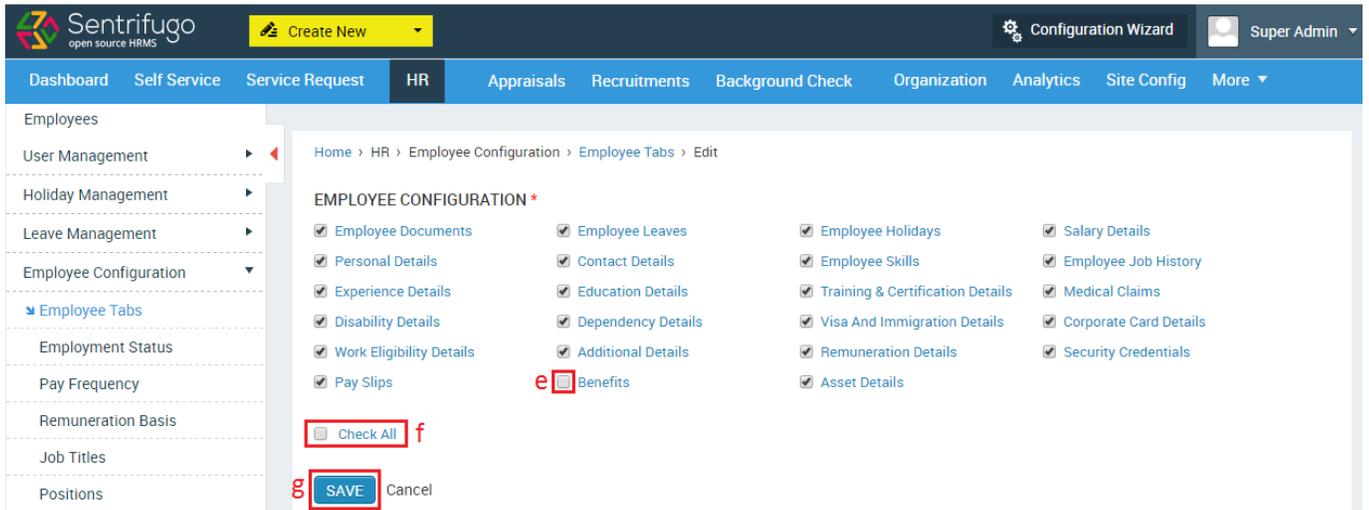


Figure 94

- e. To enable specific tabs for employees, select individual checkboxes
- f. To enable all the tabs for employees, check “Check All” checkbox
- g. Click **SAVE** button

## 6.6.2 How do I set Employee Configuration?

Please refer Figure 95

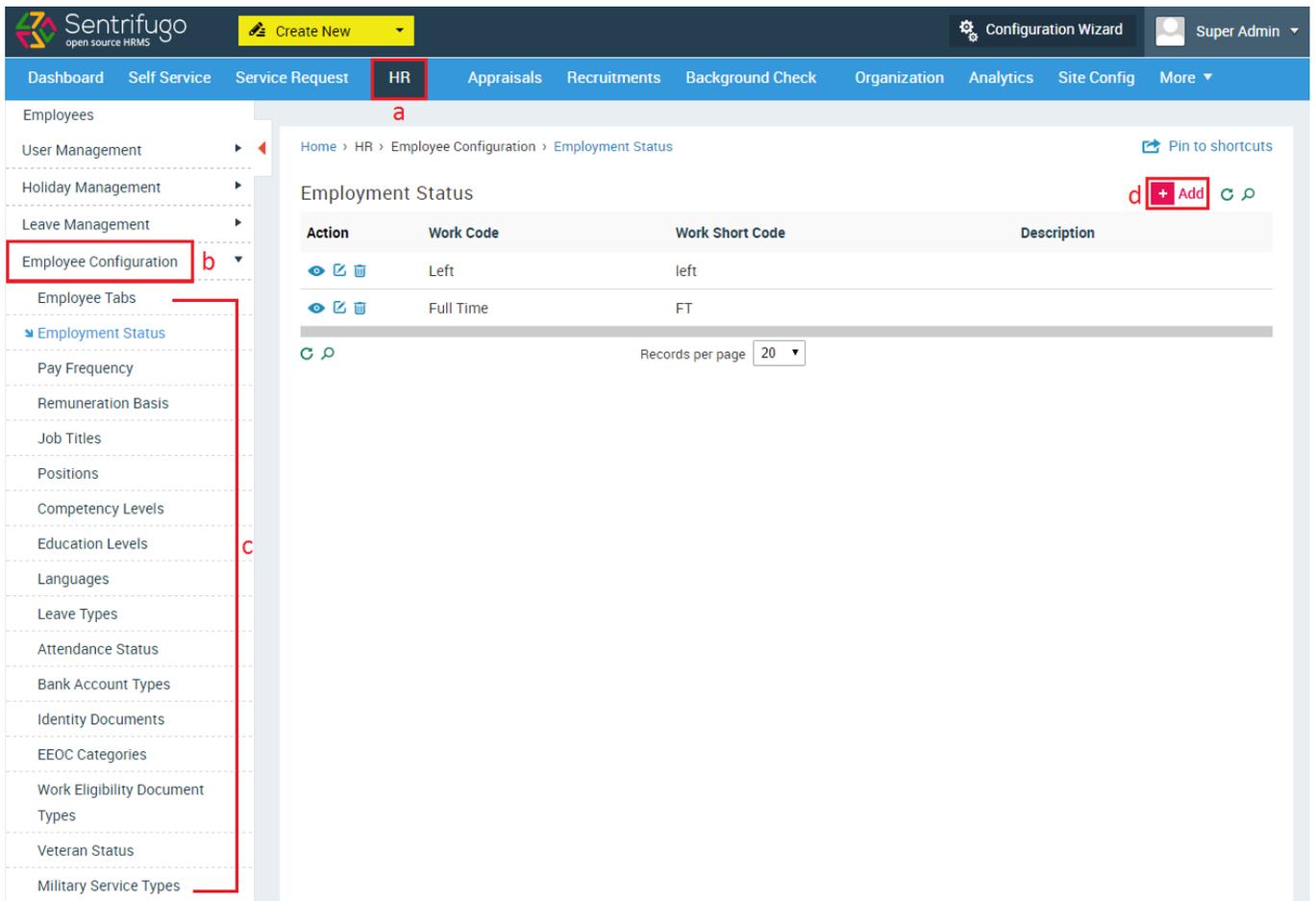


Figure 95

- a. Click **HR** in the top menu
- b. Click **Employee Configuration** on the left panel
- c. Click any sub menu option you would like to add (We have chosen 'Employment Status' as an example)
- d. Click **+Add** button on the right side panel

Please refer Figure 96

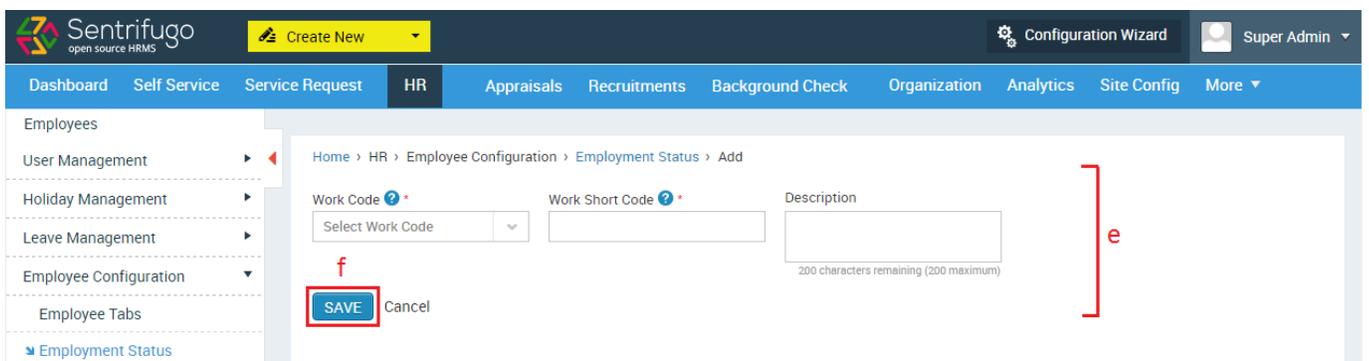
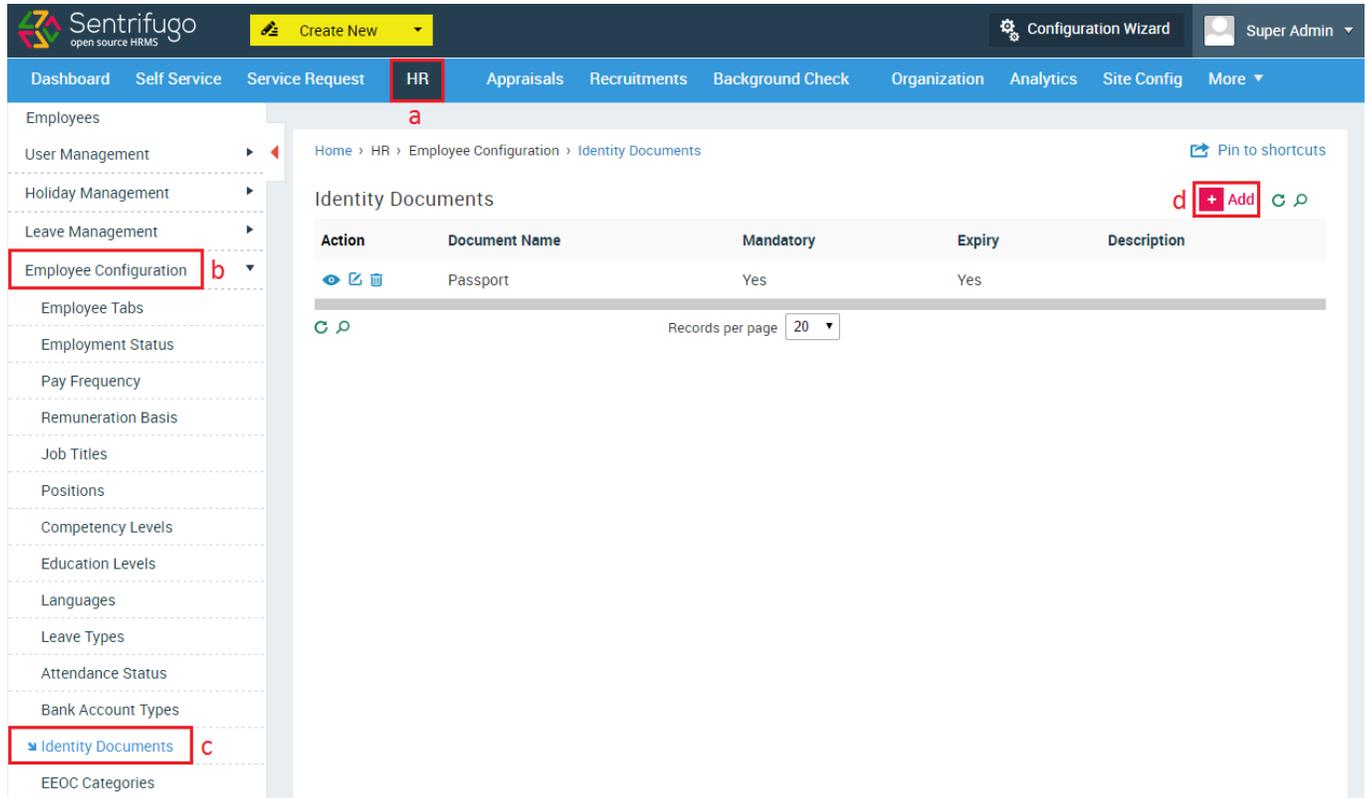


Figure 96

- e. Enter the required details
- f. Click **SAVE** button

### 6.6.3 How do I configure Identity Documents settings?

Please refer Figure 97



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR' (highlighted with 'a'), 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar menu includes 'Employees', 'User Management', 'Holiday Management', 'Leave Management', 'Employee Configuration' (highlighted with 'b'), 'Employee Tabs', 'Employment Status', 'Pay Frequency', 'Remuneration Basis', 'Job Titles', 'Positions', 'Competency Levels', 'Education Levels', 'Languages', 'Leave Types', 'Attendance Status', 'Bank Account Types', 'Identity Documents' (highlighted with 'c'), and 'EEOC Categories'. The main content area shows the 'Identity Documents' configuration page. The breadcrumb is 'Home > HR > Employee Configuration > Identity Documents'. There is a '+ Add' button (highlighted with 'd') and a refresh icon. Below is a table with the following data:

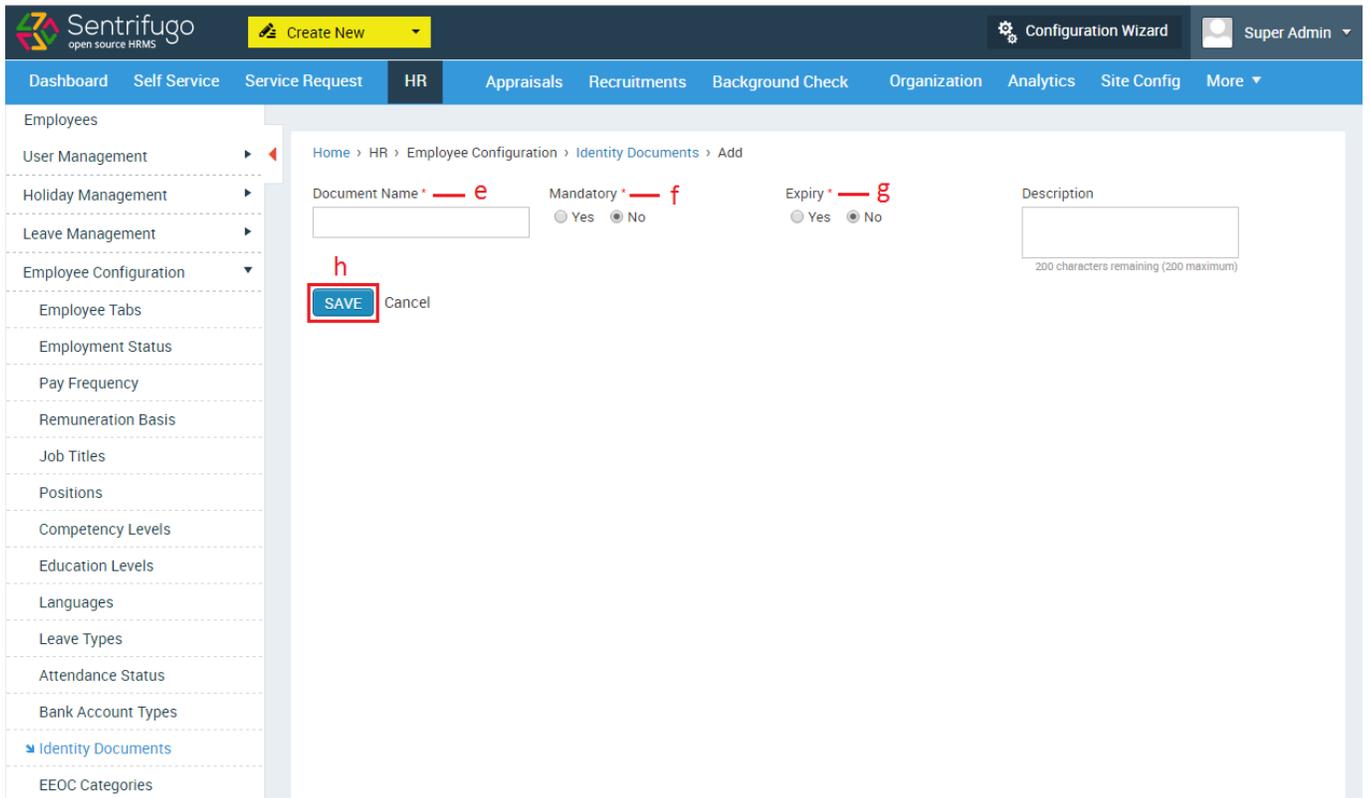
Action	Document Name	Mandatory	Expiry	Description
  	Passport	Yes	Yes	

At the bottom of the table, there is a 'Records per page' dropdown menu set to '20'.

Figure 97

- a. Click **HR** in the top menu
- b. Click **Employee Configuration** on the left menu panel
- c. Click **Identity Documents** in the submenu
- d. Click **+Add** button on the right side panel

Please refer Figure 98



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar lists various HR modules, with 'Identity Documents' selected. The main content area displays the 'Add' form for Identity Documents. The form includes a 'Document Name' field (labeled 'e'), 'Mandatory' radio buttons (labeled 'f'), 'Expiry' radio buttons (labeled 'g'), and a 'Description' field (200 characters remaining). A 'SAVE' button is highlighted with a red box and labeled 'h'.

Figure 98

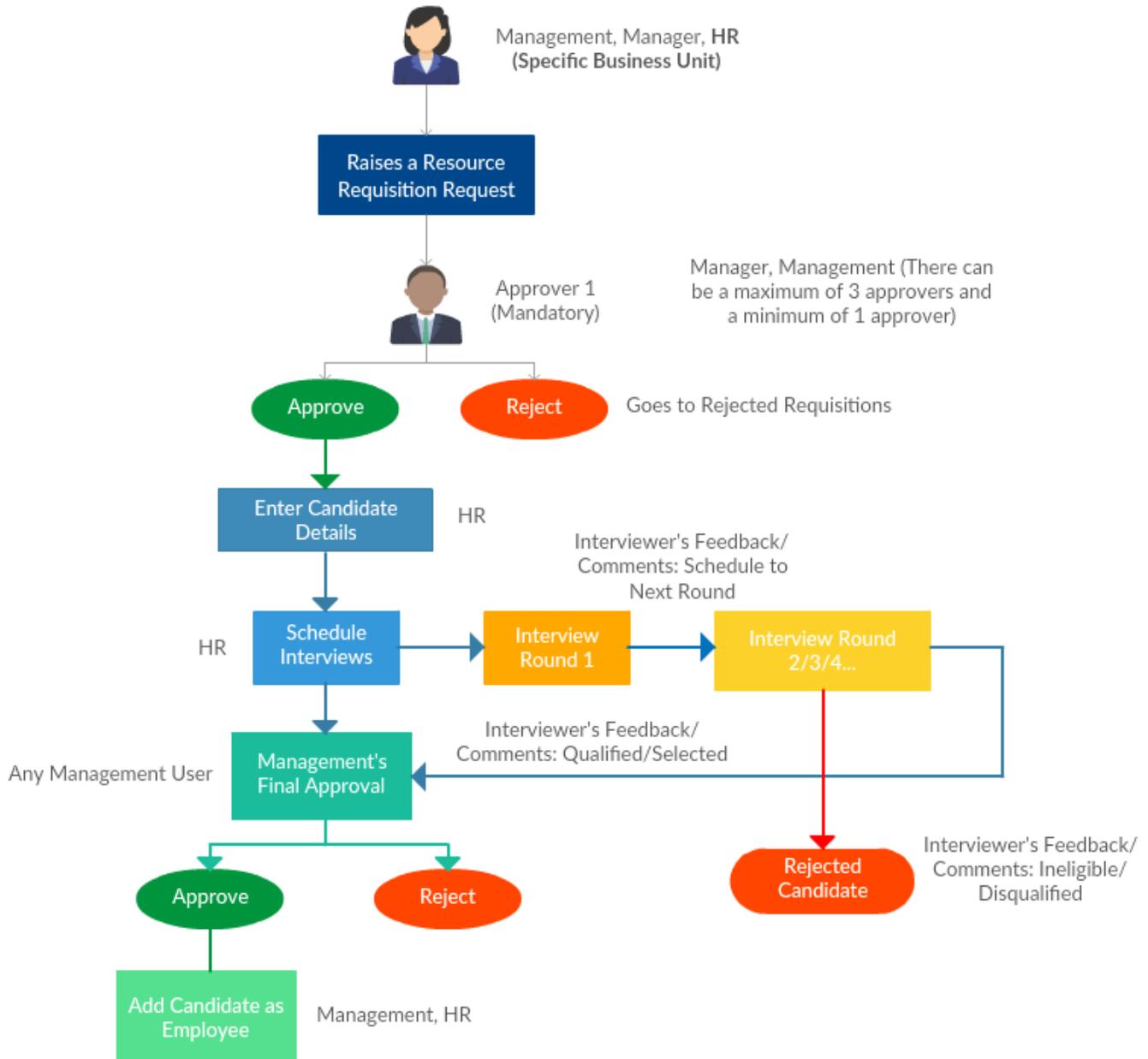
- e. Enter document name
- f. Select if you require a document to be mandatory or not
- g. Select if documents needs to have an expiry date
- h. Click **SAVE** button



Employees will be able to add their documents in Self Service > My Details > Personal > Edit

## 7. Recruitments

Recruitments simplifies your hiring process by giving you the provision to initialize a requisition, manage candidate CVs, interviews and shortlist/select candidates. Below is the recruitment process flowchart.

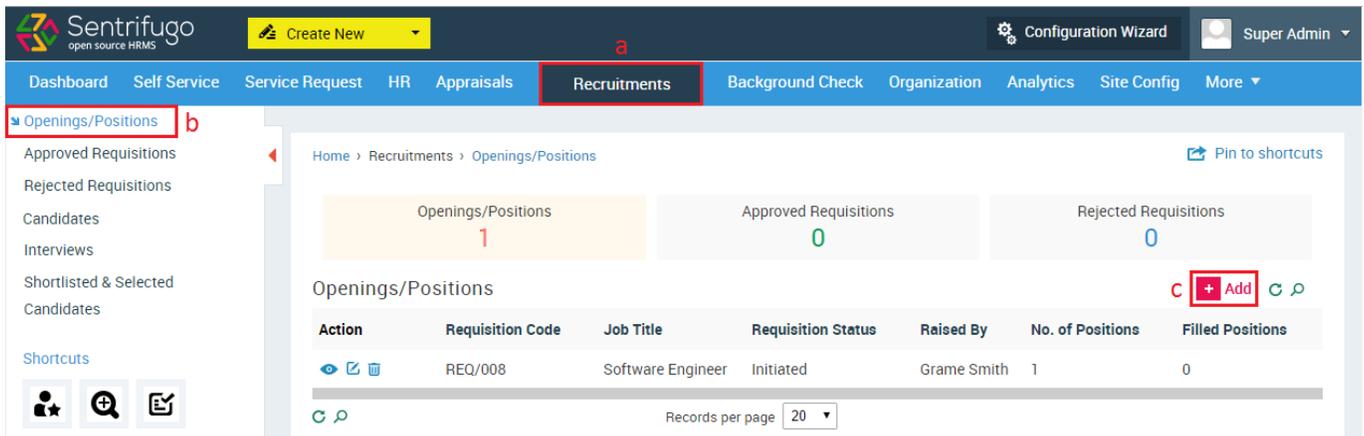


## Description:

- A User (Management/Manager/HR) raises a requisition request. According to the number of approvers selected (Min: 1 Max: 3), the approvers (Management, Manager) have to approve/reject the requisition request. A requisition can be rejected at any level.
- After the requisition request has been approved, the HR can enter the details (CV) of the candidate.
- The HR will then schedule an interview.
- The interview takes place offline.
- The interviewer (Management/Manager/HR/Employee) provides the feedback about the candidate.
- The Management has to give their final consent, they can either approve/reject.
- Once the Management approves, the HR can add the candidate to the application.

## 7.1 How do I create a Job Requisition/Opening?

Please refer Figure 99



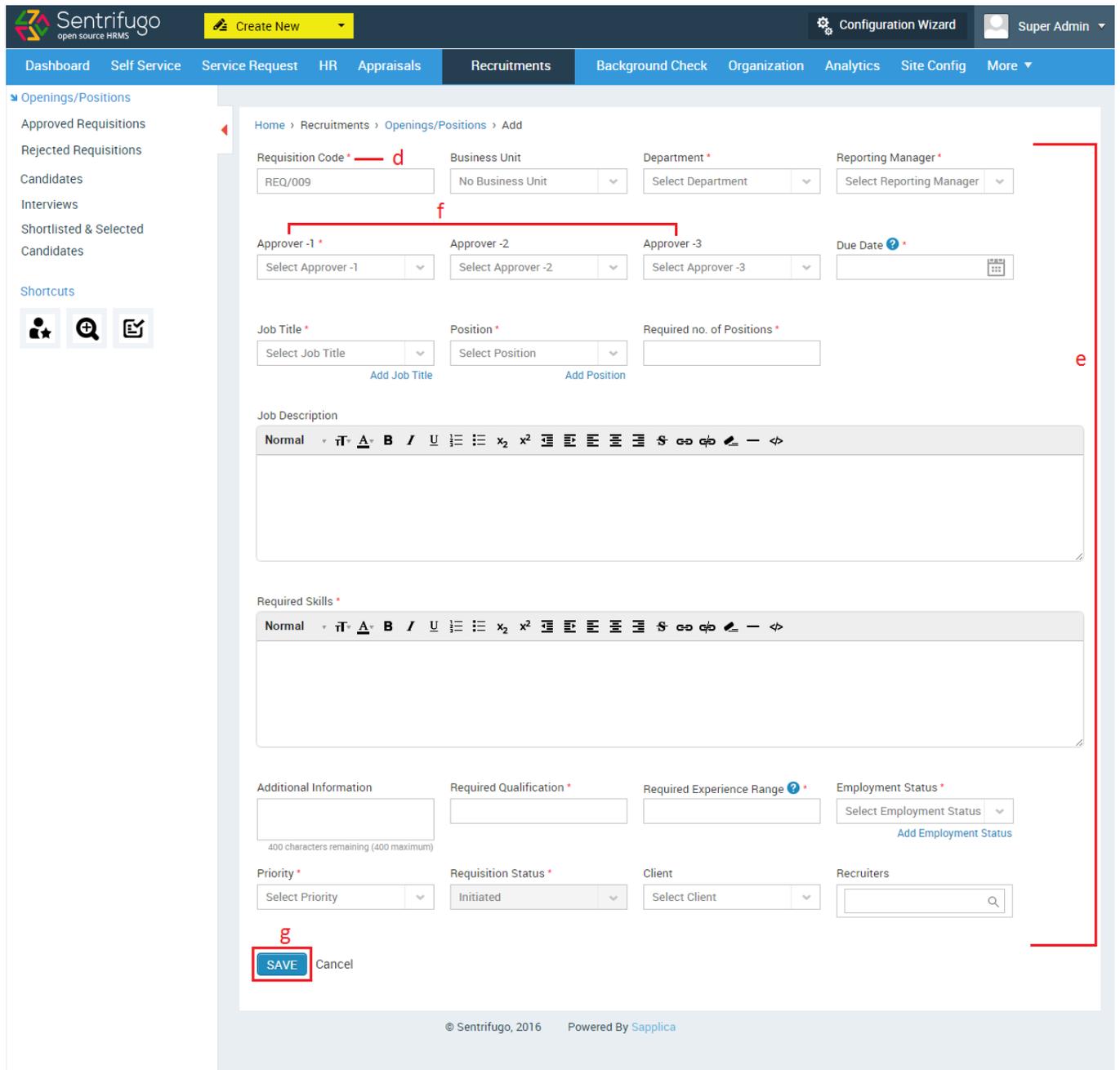
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The 'Recruitments' menu item is highlighted with a red box labeled 'a'. The left sidebar menu has 'Openings/Positions' highlighted with a red box labeled 'b'. The main content area displays a summary for 'Openings/Positions' with a count of 1, and a table with one record for 'Software Engineer' with a '+ Add' button highlighted with a red box labeled 'c'.

Action	Requisition Code	Job Title	Requisition Status	Raised By	No. of Positions	Filled Positions
  	REQ/008	Software Engineer	Initiated	Grame Smith	1	0

Figure 99

- Click **Recruitments** in the top menu
- Click **Openings/Positions** on the left menu panel
- Click **+Add** button on the right side

Please refer Figure 100



Home > Recruitments > Openings/Positions > Add

Requisition Code \* **d**  Business Unit  Department \*  Reporting Manager \*

Approver -1 \* **f**  Approver -2  Approver -3  Due Date \*

Job Title \*  Position \*  Required no. of Positions \*

Job Description

Required Skills \*

Additional Information  Required Qualification \*  Required Experience Range \*  Employment Status \*

Priority \*  Requisition Status \*  Client  Recruiters

**g**  Cancel

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Figure 100

- d. Requisition ID will be generated automatically
- e. Enter the required details
- f. Select the approver(s)
- g. Click **SAVE** button

## 7.2 How do I Approve/Reject a Requisition/Opening?

Please refer Figure 101

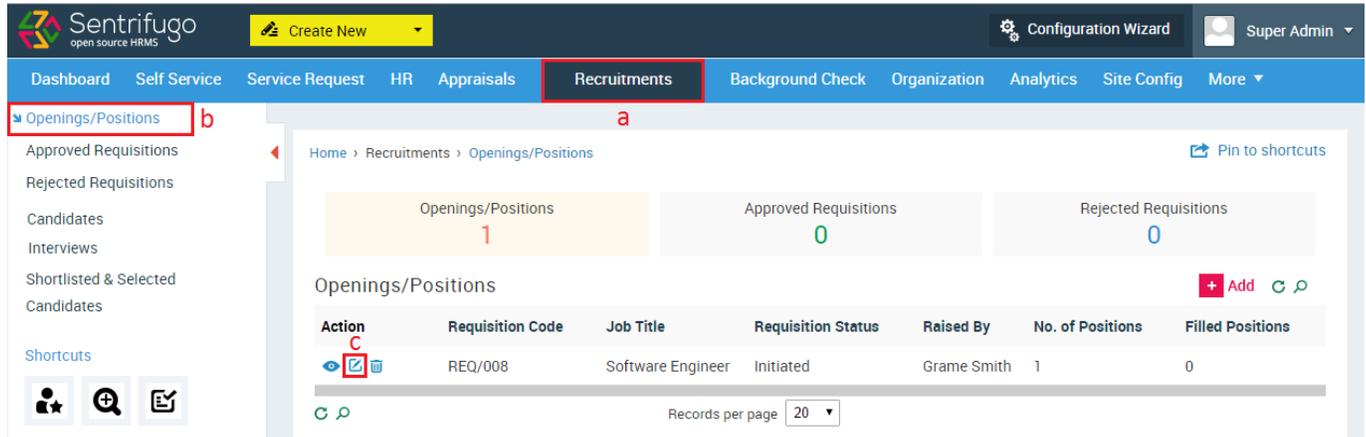


Figure 101

- Click **Recruitments** in the top menu
- Click **Openings/Positions** on the left menu panel
- Click **Edit** icon in the action column

Please refer Figure 102

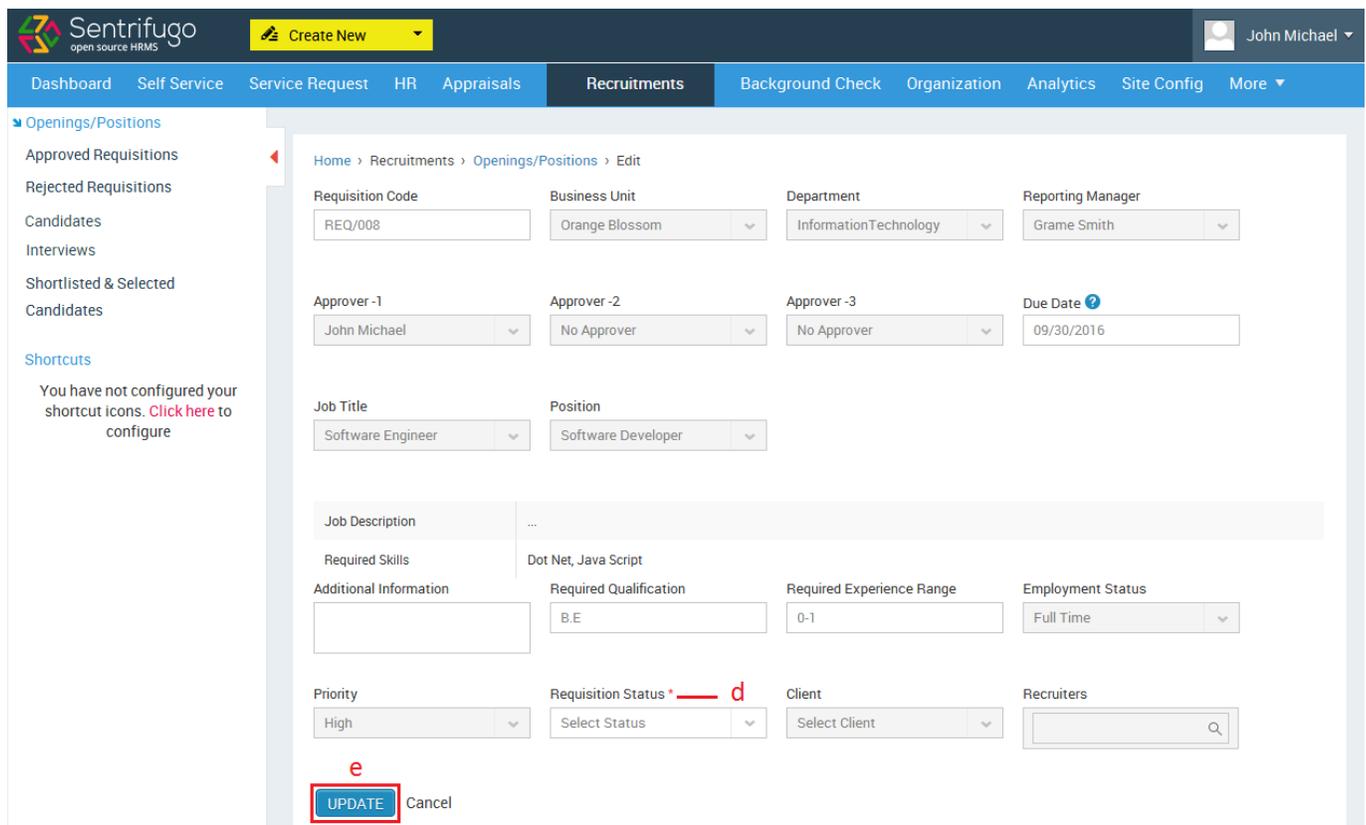
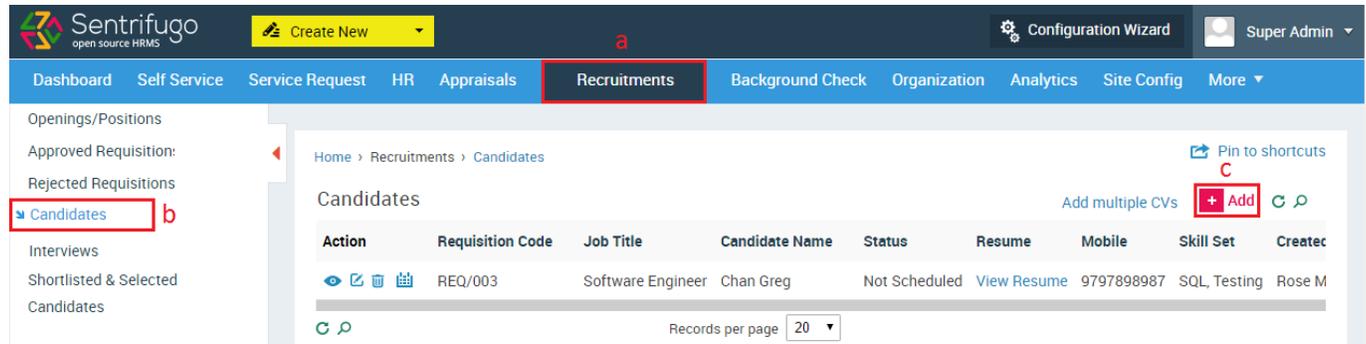


Figure 102

- d. Select an action (**Approve/Reject**) in the field requisition status
- e. Click **UPDATE** button

## 7.3 How do I enter a Candidate's details?

Please refer Figure 103



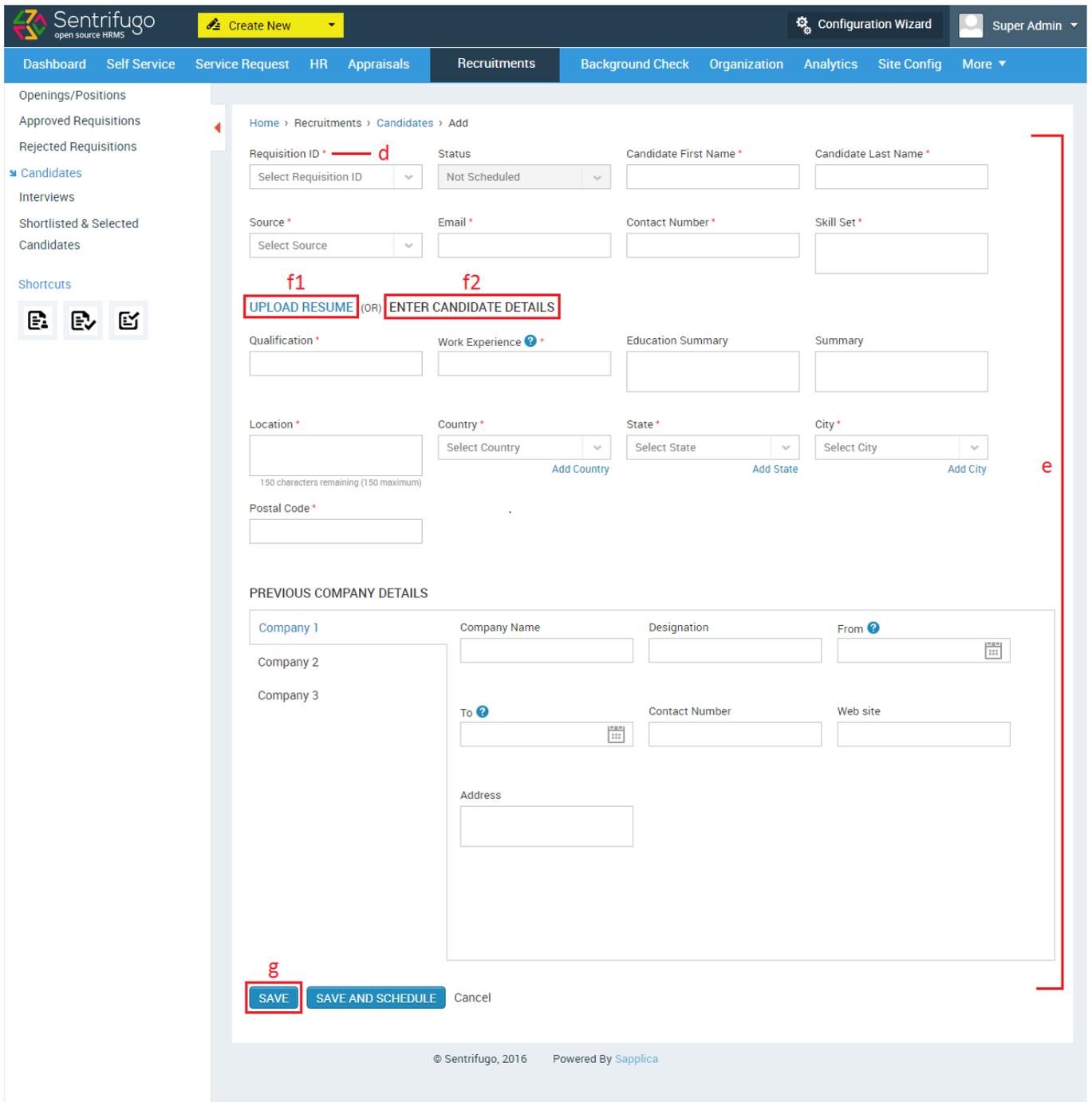
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The 'Recruitments' menu item is highlighted with a red box and labeled 'a'. The left sidebar contains 'Openings/Positions', 'Approved Requisition:', 'Rejected Requisitions', 'Candidates', 'Interviews', 'Shortlisted & Selected', and 'Candidates'. The 'Candidates' menu item is highlighted with a red box and labeled 'b'. The main content area shows the 'Candidates' page with a table of candidates. The '+ Add' button is highlighted with a red box and labeled 'c'.

Action	Requisition Code	Job Title	Candidate Name	Status	Resume	Mobile	Skill Set	Createc
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Calendar</a>	REQ/003	Software Engineer	Chan Greg	Not Scheduled	<a href="#">View Resume</a>	9797898987	SQL, Testing	Rose M

Figure 103

- a. Click **Recruitments** in the top menu
- b. Click **Candidates** on the left side panel
- c. Click **+Add** button on the right side

Please refer Figure 104



Home > Recruitments > Candidates > Add

Requisition ID \* **d** Status Candidate First Name \* Candidate Last Name \*

Select Requisition ID Not Scheduled

Source \* Email \* Contact Number \* Skill Set \*

Select Source

**f1** **f2**

**UPLOAD RESUME** (OR) **ENTER CANDIDATE DETAILS**

Qualification \* Work Experience \* Education Summary Summary

Location \* Country \* State \* City \*

150 characters remaining (150 maximum) Add Country Add State Add City

Postal Code \*

**PREVIOUS COMPANY DETAILS**

Company 1 Company Name Designation From ?

Company 2

Company 3 To ? Contact Number Web site

Address

**g**

**SAVE** **SAVE AND SCHEDULE** Cancel

© Sentrifugo, 2016 Powered By [Saplica](#)

Figure 104

- d. Select the Requisition ID
- e. Enter Candidate's name
- f1. Click to upload resume

Or

- f2. Click here to enter candidate details in a form
- g. Click **SAVE** button

## 7.4 How do I Schedule an Interview?

Please refer Figure 105

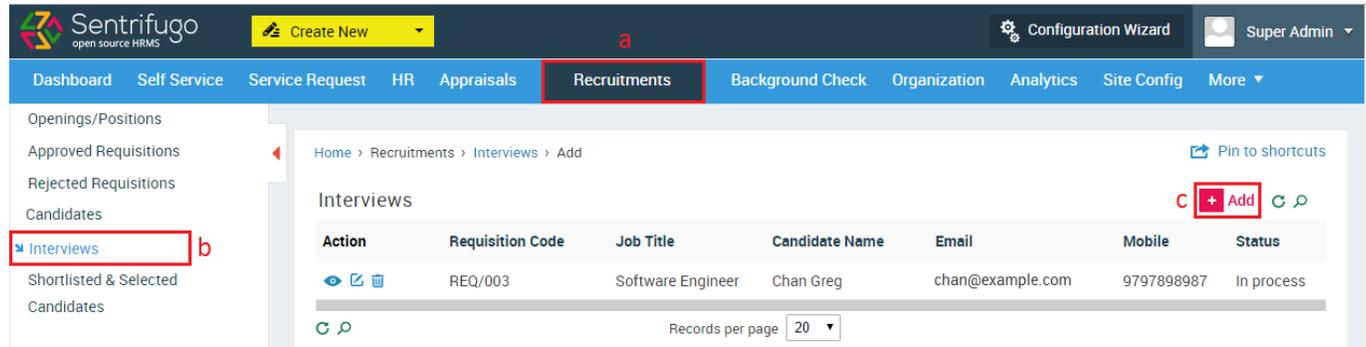


Figure 105

- a. Click **Recruitments** in the top menu
- b. Click **Interviews** on the left menu panel
- c. Click **+Add** button on the right side

Please refer Figure 106

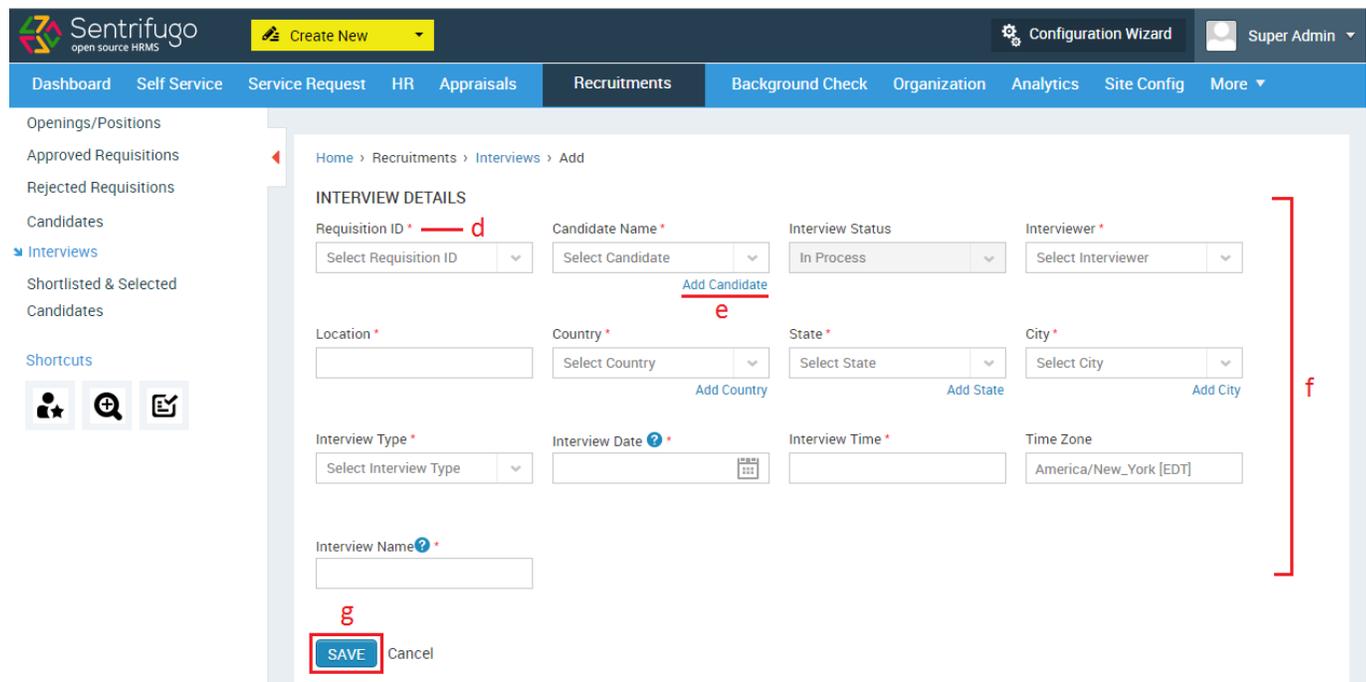


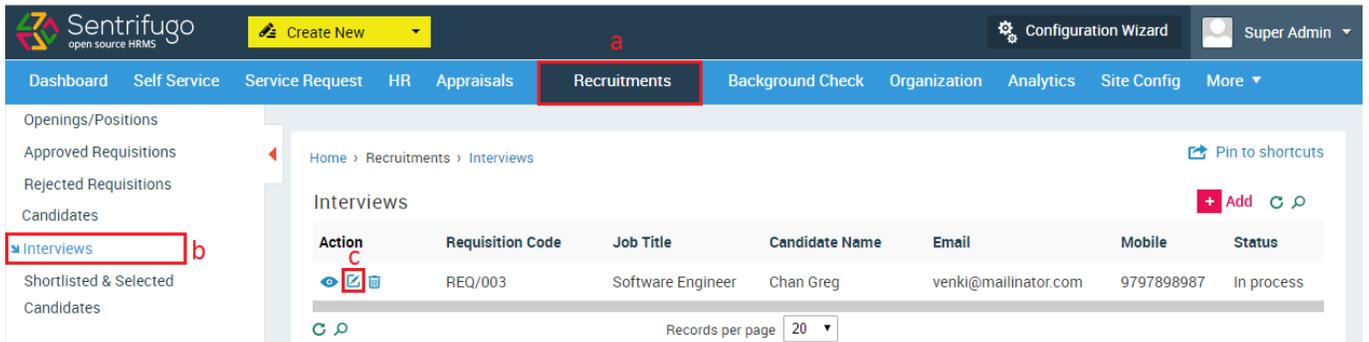
Figure 106

- d. Select the Requisition ID
- e. Add candidate details if they aren't added
- f. Enter the required details
- g. Click **SAVE** button

The interviewer and candidate will receive email notifications informing them about the interview.

## 7.5 How do I provide Feedback for an Interview?

Please refer Figure 107



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments' (highlighted with a red box and labeled 'a'), 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar contains a list of menu items: 'Openings/Positions', 'Approved Requisitions', 'Rejected Requisitions', 'Candidates', 'Interviews' (highlighted with a red box and labeled 'b'), 'Shortlisted & Selected Candidates', and 'Candidates'. The main content area displays the 'Interviews' table with the following data:

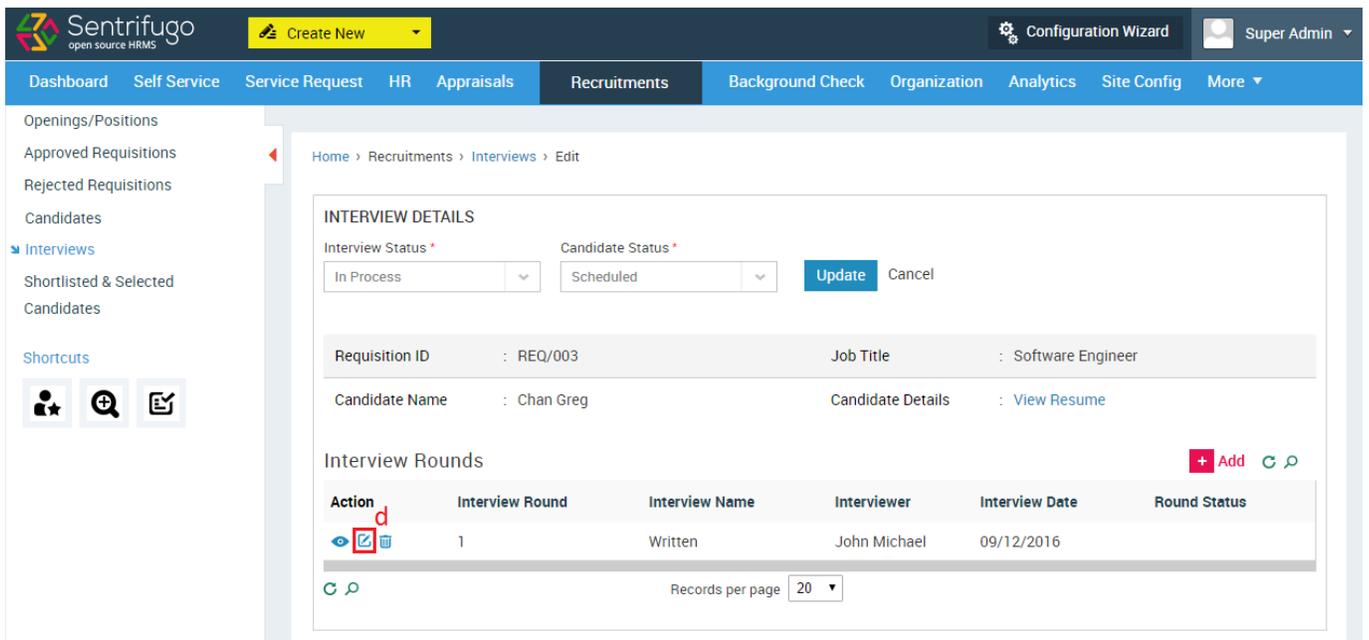
Action	Requisition Code	Job Title	Candidate Name	Email	Mobile	Status
  	REQ/003	Software Engineer	Chan Greg	venki@mailinator.com	9797898987	In process

At the bottom of the table, there is a 'Records per page' dropdown set to 20.

Figure 107

- Click **Recruitments** menu option
- Click **Scheduled Interviews** on the left side panel
- Click **Edit** icon against an interview

Please refer Figure 108



The screenshot shows the 'Edit' page for an interview in Sentrifugo HRMS. The top navigation bar is the same as in Figure 107. The left sidebar shows 'Interviews' selected. The main content area displays the 'INTERVIEW DETAILS' form with the following information:

Interview Status:  Candidate Status:

Requisition ID: REQ/003 Job Title: Software Engineer

Candidate Name: Chan Greg Candidate Details: [View Resume](#)

Below the details is the 'Interview Rounds' table:

Action	Interview Round	Interview Name	Interviewer	Interview Date	Round Status
  	1	Written	John Michael	09/12/2016	

At the bottom of the table, there is a 'Records per page' dropdown set to 20.

Figure 108

- Click **Edit** icon against an interview round

Please refer Figure 109

### Interview Rounds ✕

Interviewer * Johnson Andrew , Manag... ▾	Location * Brooklyn	Country * United States ▾
State * California ▾	City * Berkeley ▾	Interview Type * In Person ▾
Interview Date ? * 09/30/16 	Interview Time * 01:00 PM	Time Zone America/Antigua [AST]
Interview Name ? Written	Interviewer Feedback <input type="text"/>	Interviewer Comments <input type="text"/>
Result Status * Select Status ▾		

**f**

Cancel

**e**

Figure 109

- e. Provide feedback, comments and select the round status
- f. Click **UPDATE** button

Please refer Figure 110

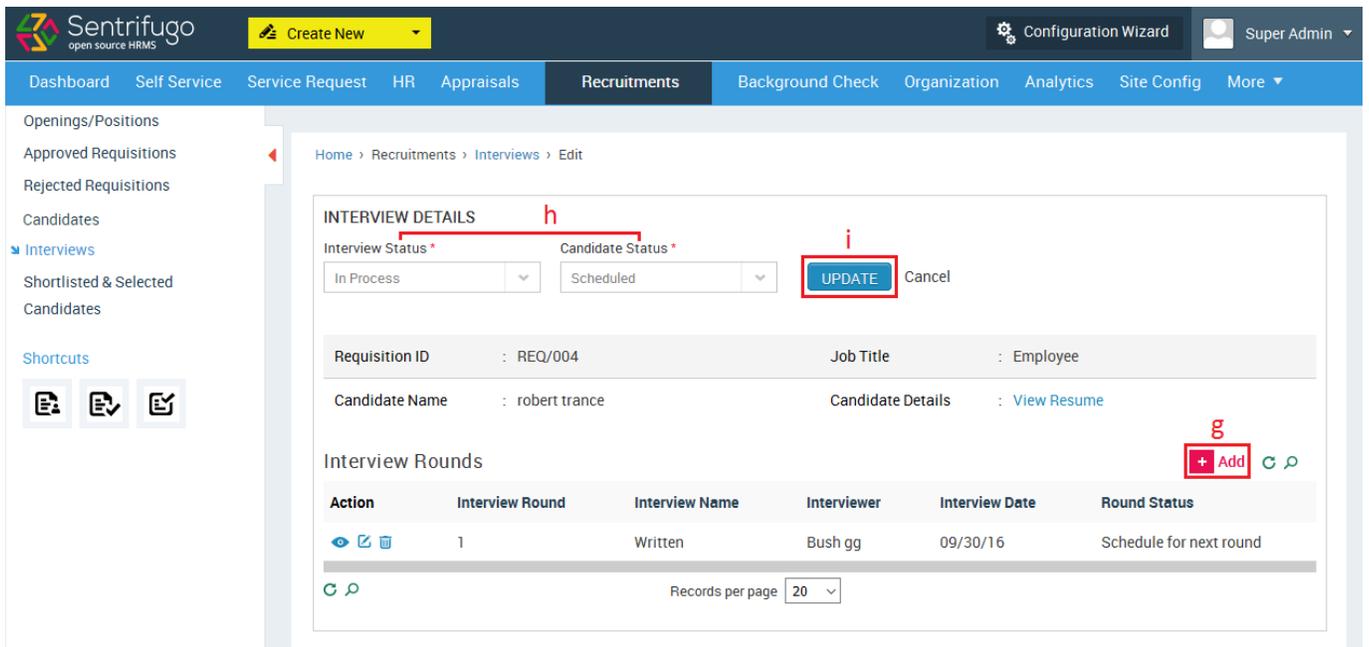


Figure 110

- g. Click **+Add** to add another interview round (Provided you have given 'Schedule for next round' as round status)
- h. Provide the interview and candidate status
- i. Click **UPDATE** button

## 7.6 How do I select/reject a Shortlisted Candidate? (Management's Final Approval)

Please refer Figure 111

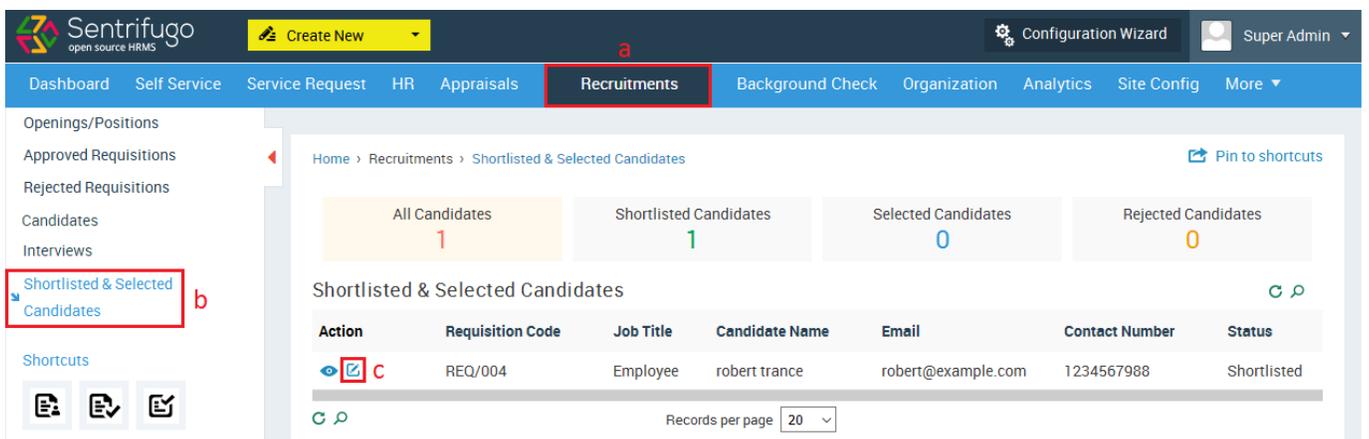
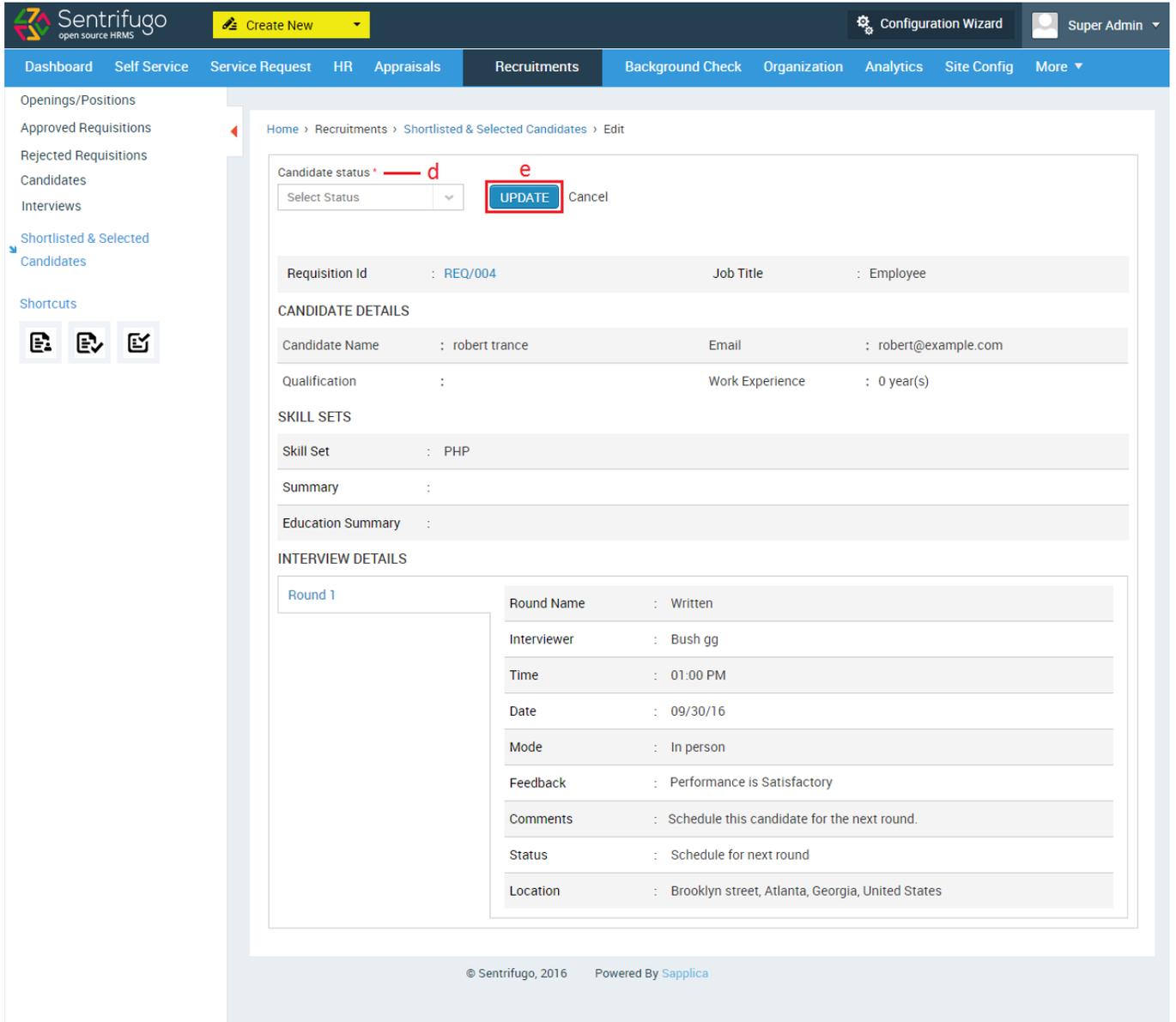


Figure 111

- a. Click **Recruitments** in the top menu

- b. Click **Shortlisted & Selected Candidates** on the left menu panel
- c. Click **Edit** icon against a requisition code

Please refer Figure 112



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar shows a menu with 'Shortlisted & Selected Candidates' selected. The main content area displays the 'Edit' page for a candidate. At the top, there is a 'Candidate status' dropdown menu with 'Select Status' and an 'UPDATE' button highlighted with a red box. A red line with a 'd' points to the dropdown menu, and a red 'e' points to the 'UPDATE' button. Below this, the page shows details for Requisition Id (REQ/004) and Job Title (Employee). The 'CANDIDATE DETAILS' section includes Candidate Name (robert trance), Email (robert@example.com), Qualification, and Work Experience (0 year(s)). The 'SKILL SETS' section shows Skill Set (PHP). The 'INTERVIEW DETAILS' section shows Round 1 with details: Round Name (Written), Interviewer (Bush gg), Time (01:00 PM), Date (09/30/16), Mode (In person), Feedback (Performance is Satisfactory), Comments (Schedule this candidate for the next round), Status (Schedule for next round), and Location (Brooklyn street, Atlanta, Georgia, United States).

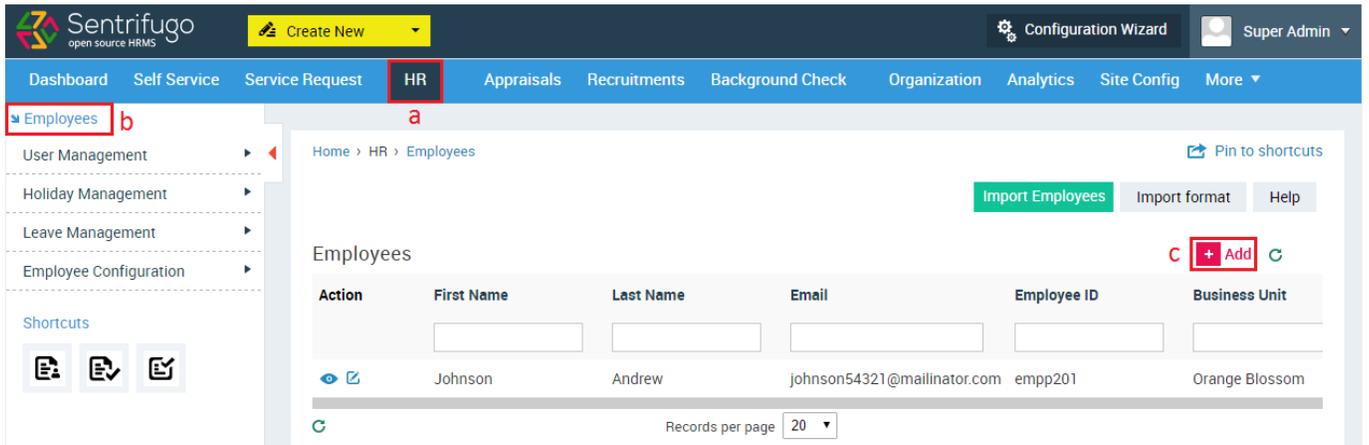
Figure 112

- d. Select the status (select/reject)
- e. Click **UPDATE** button

## 7.7 How do I add a Candidate as an Employee?

After an employee has been selected by the Management. The candidate can be added to Sentrifugo.

Please refer Figure 113



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The 'HR' menu item is highlighted with a red box and labeled 'a'. The left sidebar menu has 'Employees' highlighted with a red box and labeled 'b'. The main content area shows the 'Employees' page with a breadcrumb 'Home > HR > Employees' and a 'Pin to shortcuts' button. There are buttons for 'Import Employees', 'Import format', and 'Help'. A '+ Add' button is highlighted with a red box and labeled 'c'. Below these buttons is a table with columns: Action, First Name, Last Name, Email, Employee ID, and Business Unit. The table contains one record for 'Johnson Andrew' with email 'johnson54321@mailinator.com' and Employee ID 'empp201' in the 'Orange Blossom' Business Unit. At the bottom, there is a 'Records per page' dropdown set to '20'.

Figure 113

- a. Click **HR** in the top menu
- b. Click **Employees** on the left menu panel
- c. Click **+Add** button on the right side

Please refer Figure 114

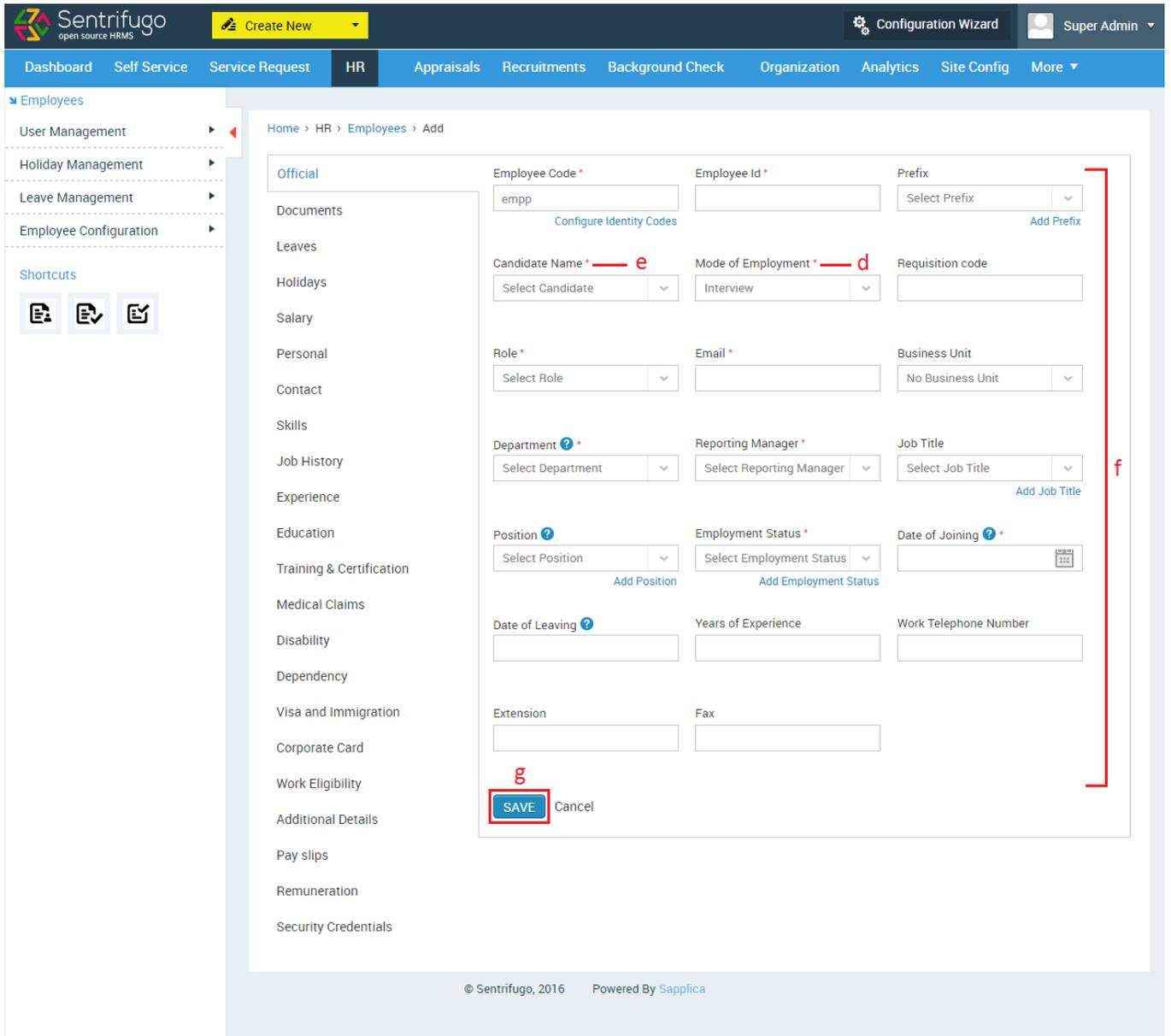


Figure 114

- d. Select **'Interview'** in the field Mode of Employment
- e. The shortlisted candidates' names will be populated here, select a candidate from the drop down list
- f. Enter all the required details
- g. Click **SAVE** button

An activity log will be displayed for every action performed by user(s) involved in a Recruitment Cycle. This will provide users more clarity about the status of the process.

- Openings/Positions
- Approved Requisitions
- Rejected Requisitions
- Candidates
- Interviews
- Shortlisted & Selected Candidates
- Shortcuts
- You have not configured your shortcut icons. [Click here to configure](#)

Home > Recruitments > Approved Requisitions > View [Edit](#)

Requisition Status	Approved
--------------------	----------

**REQUISITION DETAILS**

Requisition Id	REQ/002	Job Title	Employee
Due Date	2016-12-16	Business Unit	Unit A
Department	Quality Assurance	Position	Employee
Reporting Manager	Johnty Rodhes	Priority	High
Employment Status	Permanent	Req. Qualification	BE
Req. Experience Range	5-8	Req. no. of Positions	2
Filled. no. of Positions	...	Raised By	Anderson Neo
Approver -1	Andrew Joel	Approver -2	No Approver
Approver -3	No Approver	Client	Google
Recruiters	Rose Mary		

**JOB DETAILS**

Job Title	Employee	Job Description	...
Required Skills	QA, SQL and Automation	Additional Information	...

**Candidate details**

Candidate Name	Candidate Status
No data found	

**REQUISITION HISTORY**

-  Requisition status has been changed as Approved by Anderson Neo  
 2016-12-19 11:23 PM

---

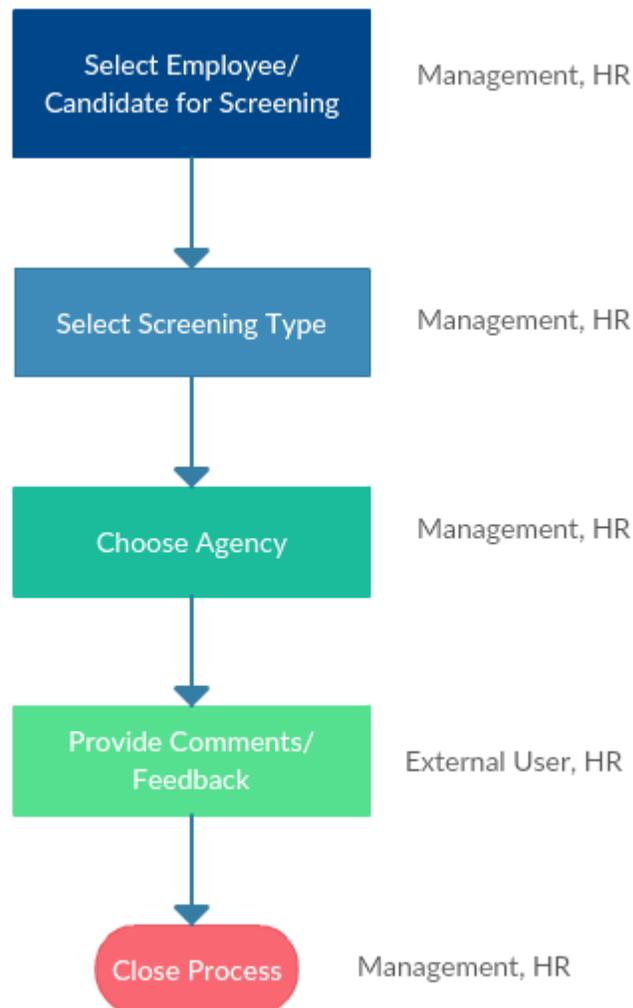
-  Requisition status has been Approved by Andrew Joel  
 2016-12-14 02:17 AM

---

-  Requisition has been Created by Anderson Neo  
 2016-12-14 02:11 AM

## 8. Background Check

Background Check module enables the Pre and Post-Employment screening process. You can configure the screening types and manage the agencies you wish to work with. Below is the Background Check process flowchart.



### Description:

- A User (Management, HR) selects an employee or candidate to have a background check performed on him/her
- The User selects the screening type and an agency for that screening type

- An External User (Agency User) logs into the application and provide details/feedback about the employee/candidate.
- The User views the feedback and provides his/her own comments.
- The User closes the process.

## 8.1 How do I add a Screening Type?

Please refer Figure 115

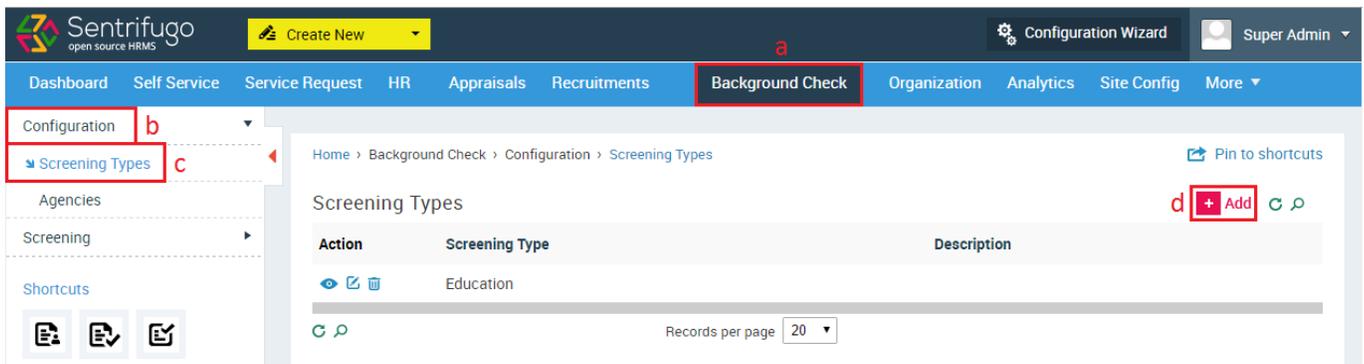


Figure 115

- Click **Background Check** in the top menu
- Click **Configuration** on the left menu panel
- Click **Screening Types** in the submenu
- Click **+Add** button on the right side

Please refer Figure 116

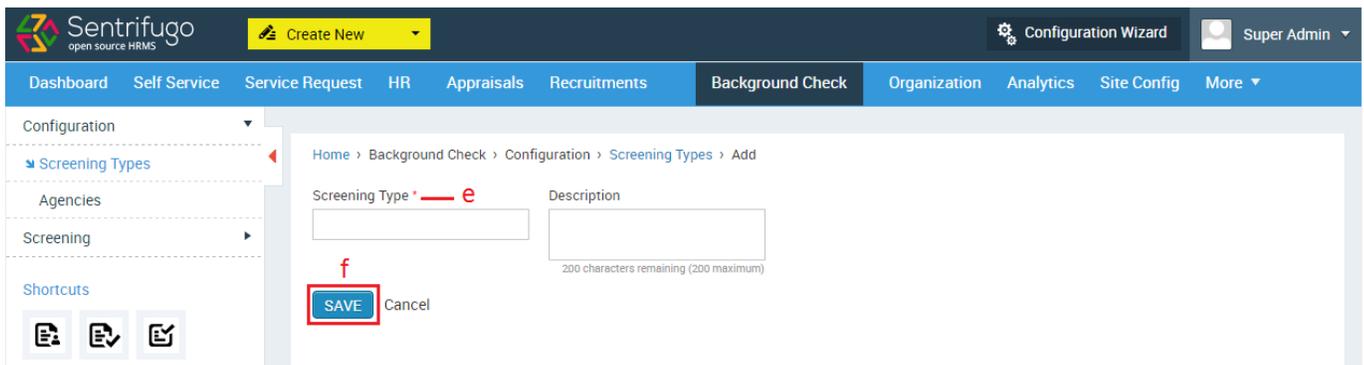
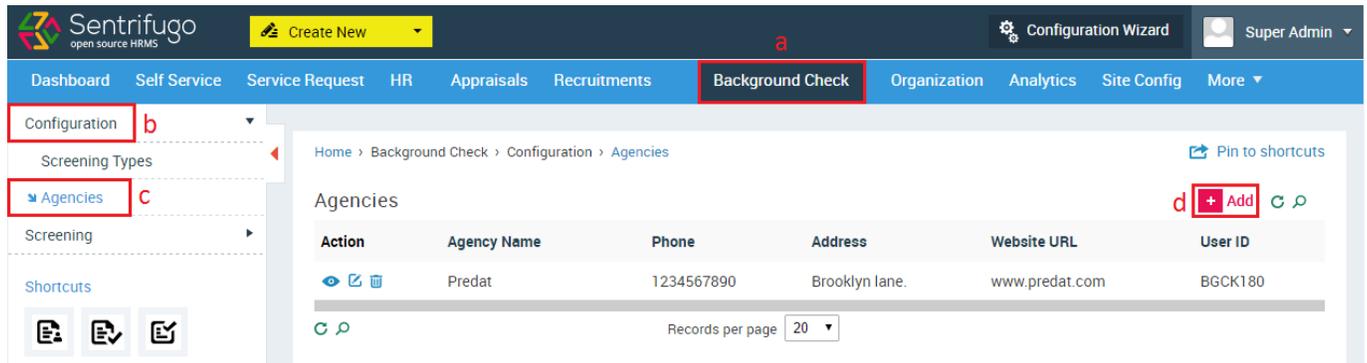


Figure 116

- Enter the required details
- Click **SAVE** button

## 8.2 How do I add an Agency?

Please refer Figure 117



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check' (highlighted with 'a'), 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar menu includes 'Configuration' (highlighted with 'b'), 'Screening Types', 'Agencies' (highlighted with 'c'), and 'Screening'. The main content area shows the 'Agencies' configuration page with a breadcrumb trail: 'Home > Background Check > Configuration > Agencies'. A '+ Add' button (highlighted with 'd') is visible on the right side of the page. Below the breadcrumb trail is a table with the following data:

Action	Agency Name	Phone	Address	Website URL	User ID
  	Predat	1234567890	Brooklyn lane.	www.predat.com	BGCK180

At the bottom of the table, there is a 'Records per page' dropdown menu set to '20'.

Figure 117

- Click **Background Check** in the top menu
- Click **Configuration** on the left menu panel
- Click **Agencies** in the submenu
- Click **+Add** button on the right side

Please refer Figure 118

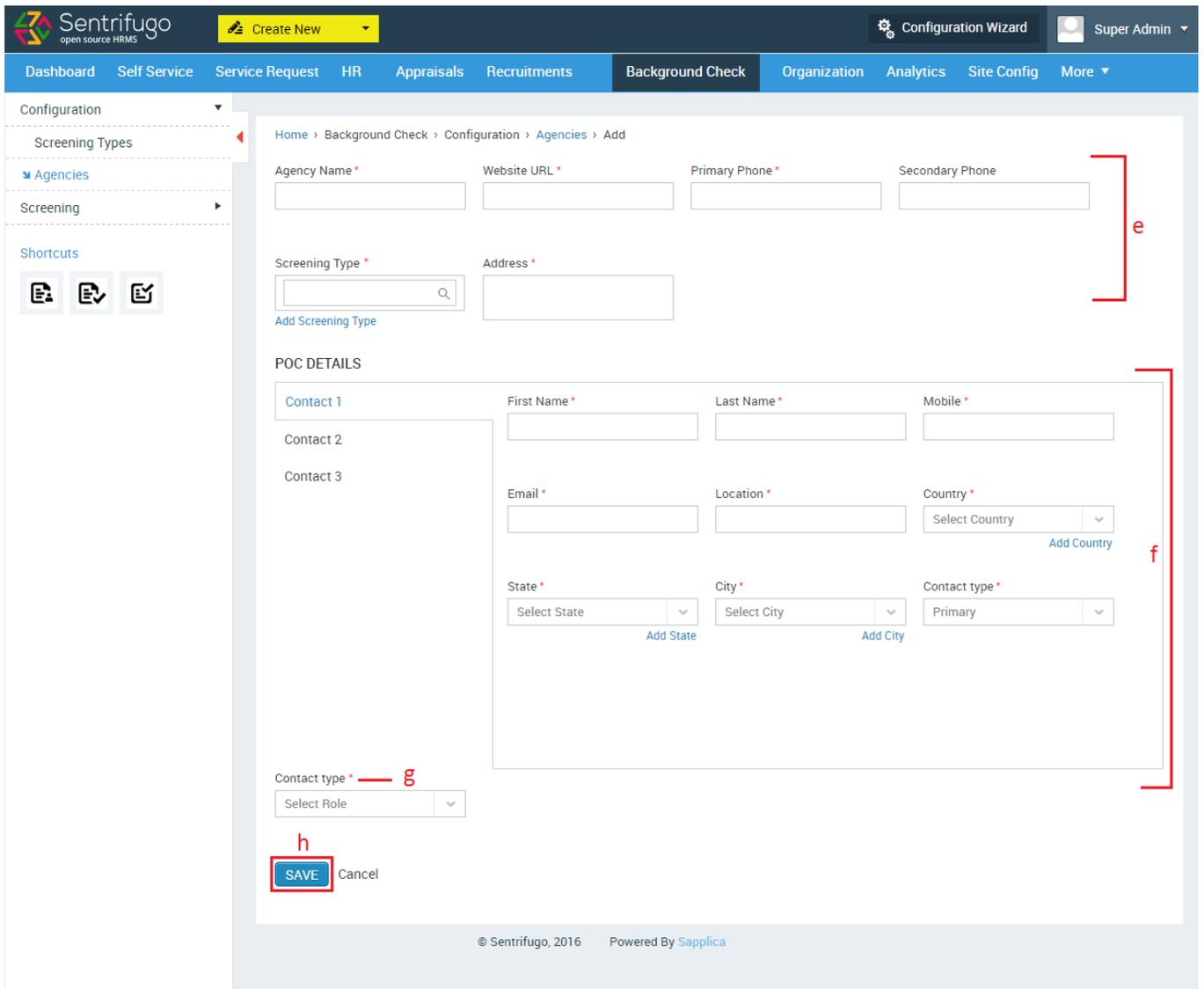
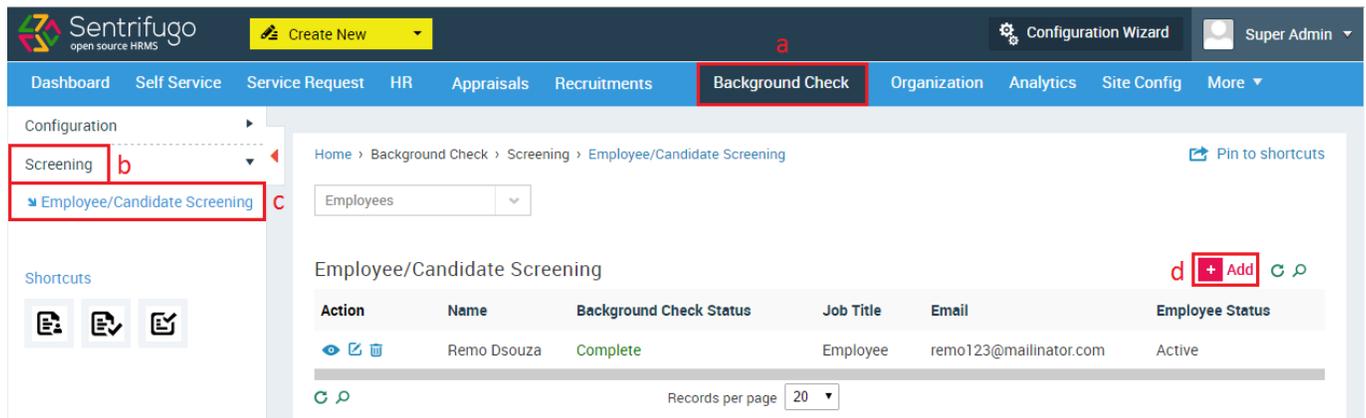


Figure 118

- e. Enter the required details
- f. Enter POC (Point of Contact) details
- g. Enter Contact Type (The roles created for an external user will be populated here. Please refer section [6.2 How do I add Roles & Privileges](#))
- h. Click **SAVE** button

## 8.3 How do I select an Employee/Candidate for Screening?

Please refer Figure 119



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The 'Background Check' menu item is highlighted with a red box and labeled 'a'. On the left sidebar, under 'Configuration', the 'Screening' menu item is highlighted with a red box and labeled 'b', and its sub-menu 'Employee/Candidate Screening' is also highlighted with a red box and labeled 'c'. The main content area shows the 'Employee/Candidate Screening' page with a breadcrumb trail 'Home > Background Check > Screening > Employee/Candidate Screening'. A dropdown menu for 'Employees' is visible. Below this, there is a table with the following data:

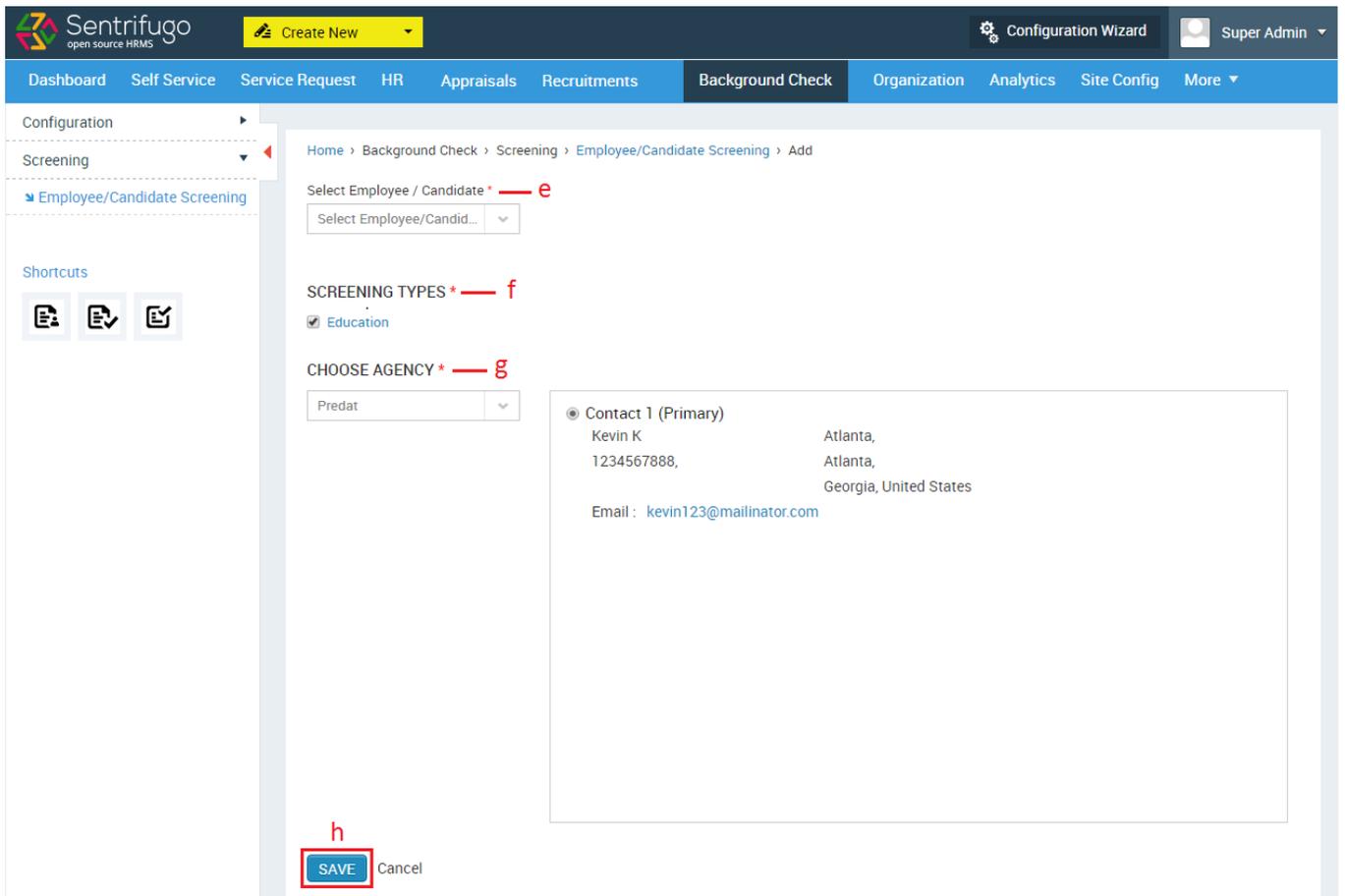
Action	Name	Background Check Status	Job Title	Email	Employee Status
  	Remo Dsouza	Complete	Employee	remo123@mailinator.com	Active

At the bottom right of the table, there is a '+ Add' button highlighted with a red box and labeled 'd', along with refresh and delete icons. A 'Records per page' dropdown is set to 20.

Figure 119

- Click **Background Check** in the top menu
- Click **Screening** on the left menu panel
- Click **Employee/Candidate Screening** in the submenu
- Click **+Add** button on the right side

Please refer Figure 120



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The user is logged in as 'Super Admin'. The current page is 'Employee/Candidate Screening' under the 'Background Check' section. The form contains the following elements:

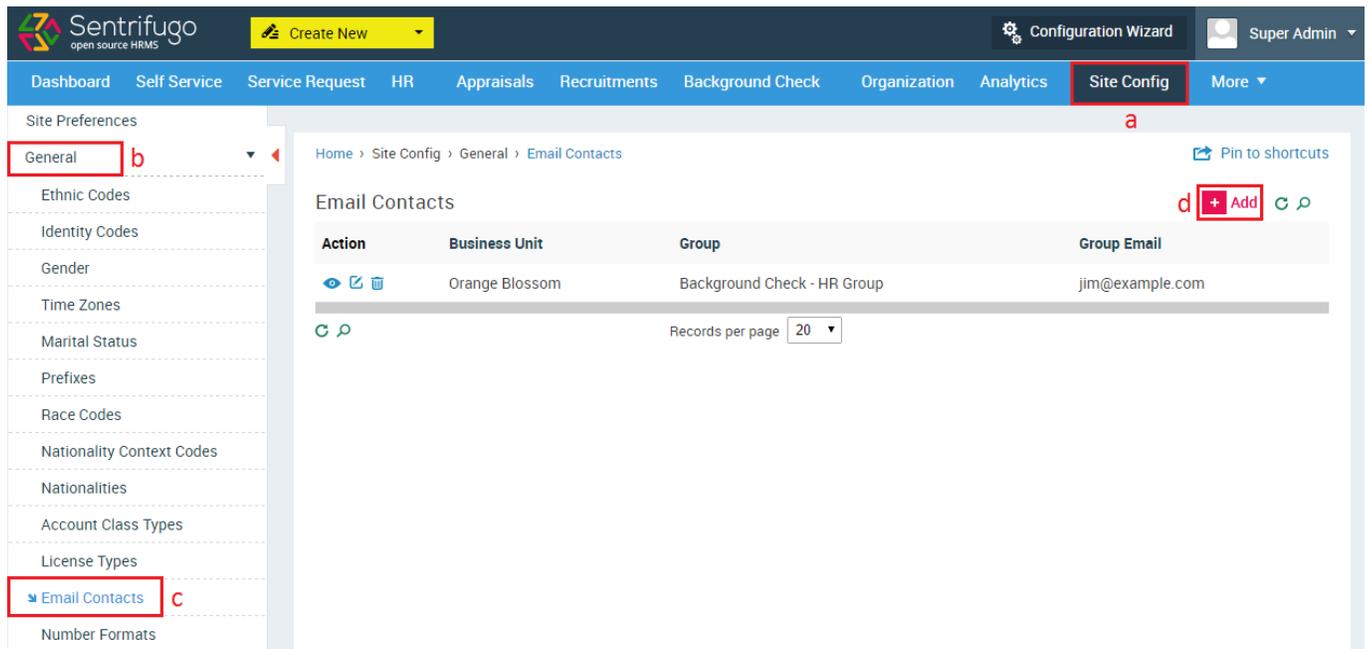
- Select Employee / Candidate \*** (labeled 'e'): A dropdown menu with the text 'Select Employee/Candid...'.
- SCREENING TYPES \*** (labeled 'f'): A section with a checked checkbox for 'Education'.
- CHOOSE AGENCY \*** (labeled 'g'): A dropdown menu with 'Predat' selected.
- Contact Information**: A box containing details for 'Contact 1 (Primary)':
  - Name: Kevin K
  - Phone: 1234567888
  - Address: Atlanta, Atlanta, Georgia, United States
  - Email: kevin123@mallinator.com
- SAVE button** (labeled 'h'): A blue button with the text 'SAVE' and 'Cancel' next to it.

Figure 120

- e. Select an Employee/Candidate
- f. Select a Screening Type
- g. Choose the agency
- h. Click **SAVE** button

## 8.4 How do I set up HR and Management Group Emails?

Please refer Figure 121



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The 'Site Config' menu item is highlighted with a red box and labeled 'a'. The left sidebar shows 'Site Preferences' with 'General' highlighted by a red box and labeled 'b'. Under 'General', 'Email Contacts' is highlighted by a red box and labeled 'c'. The main content area shows the 'Email Contacts' page with a table containing one record: 'Background Check - HR Group' with email 'jim@example.com'. The '+Add' button is highlighted with a red box and labeled 'd'.

Action	Business Unit	Group	Group Email
  	Orange Blossom	Background Check - HR Group	jim@example.com

Figure 121

- a. Click **Site Config** on the top menu
- b. Click **General** on the left menu panel
- c. Click **Email Contacts** in the submenu
- d. Click **+Add** button on the right side

Please refer Figure 122

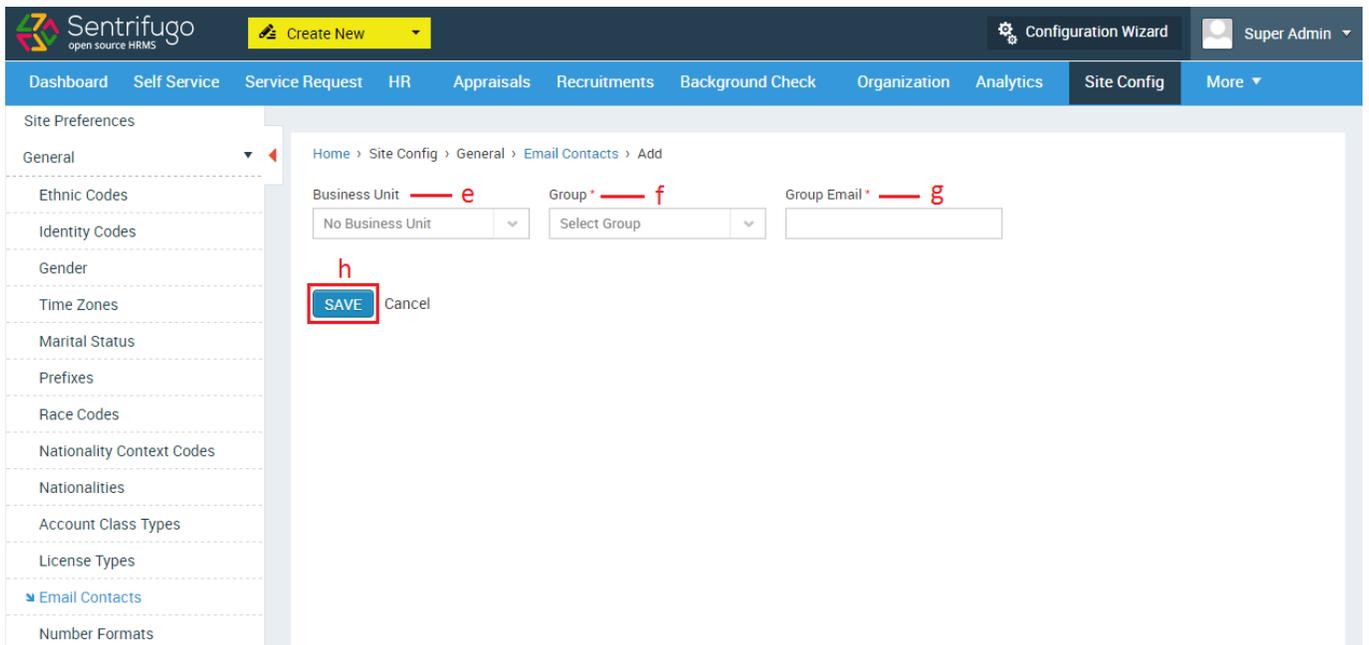


Figure 122

- e. Select the business unit the HR group
- f. Select 'Background Check – HR Group' (HR)/ 'Background Check' Management Group (Management)
- g. Enter group email id
- h. Click **SAVE** button



Every HR/Management group email must be unique for a Business Unit. If repeated, you will get an error message saying **Group email already exists.**

## 8.5 How do I provide Feedback as an External User?

Please refer Figure 123

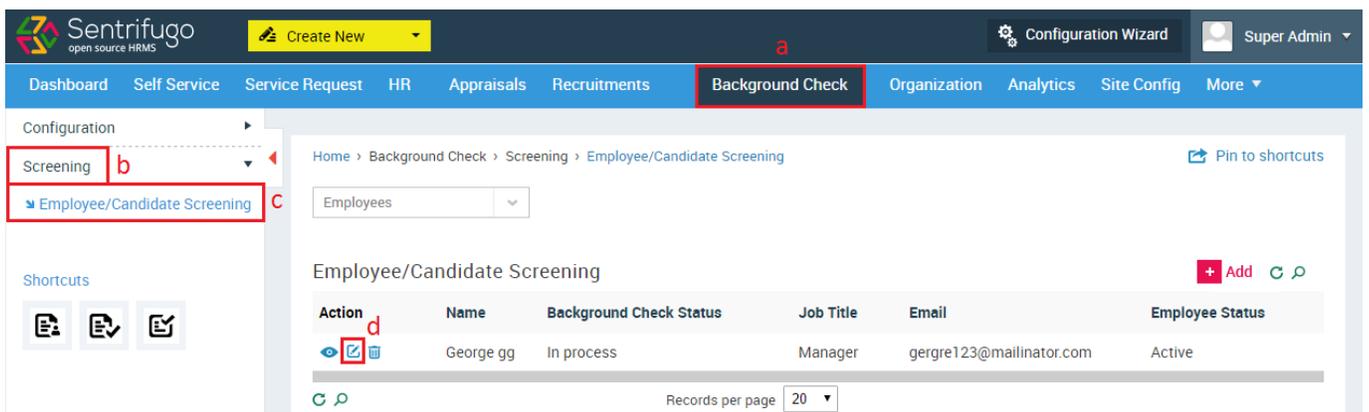
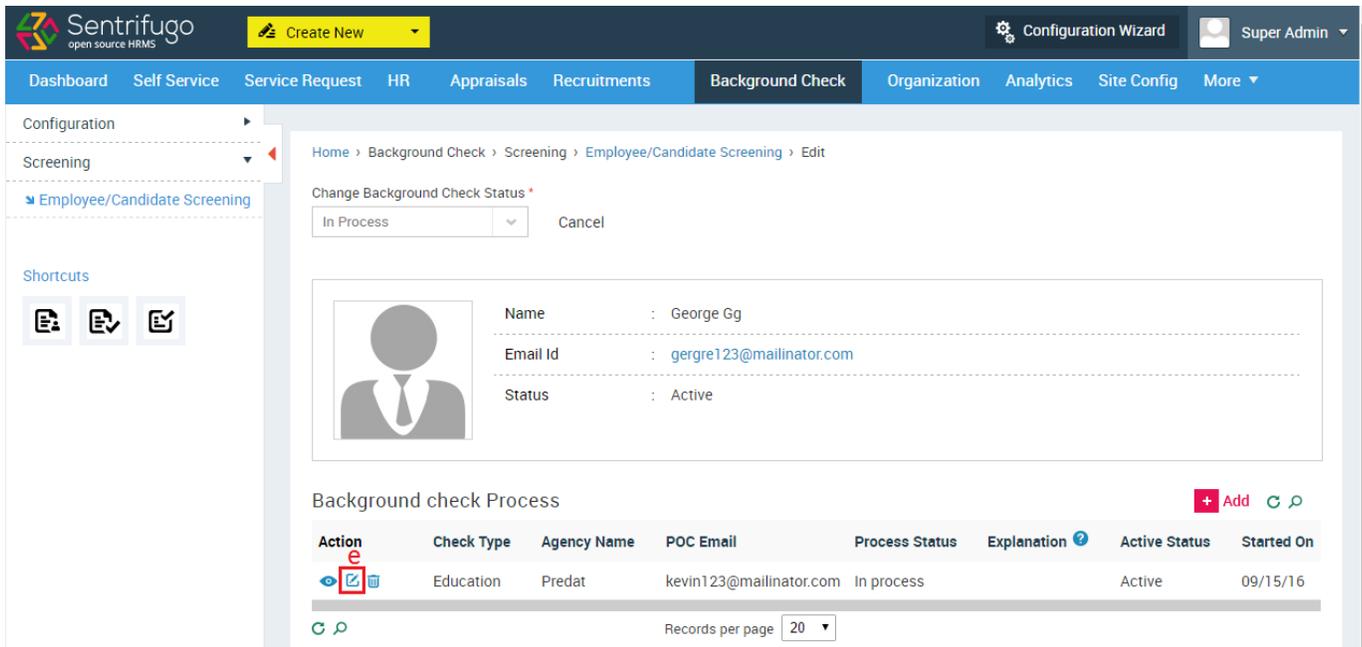


Figure 123

- a. Click **Background Check** in the top menu
- b. Click **Screening** on the left side panel
- c. Click **Employee/Candidate Screening** in the submenu
- d. Click **Edit icon** against an employee/candidate name

Please refer Figure 124



Home > Background Check > Screening > Employee/Candidate Screening > Edit

Change Background Check Status \*

In Process

Name : George Gg

Email Id : gergre123@mailinator.com

Status : Active

Background check Process + Add ↻ ↺

Action	Check Type	Agency Name	POC Email	Process Status	Explanation	Active Status	Started On
	Education	Predat	kevin123@mailinator.com	In process		Active	09/15/16

Records per page 20

Figure 124

- e. Click on the Edit icon against an employee/candidate name in the Background Check Process Grid

Please refer Figure 125

### Background check Process ✕

Change Background Check Status \*

**AGENCY & POC DETAILS**

Check Type	: Education
Agency Name	: Predat
Contact Person Name	: Kevin K
Contact Number	: 1234567888
Email	: kevin123@mailinator.com
Address	: Atlanta, Atlanta, Georgia, United States

**CLOSE**

**UPLOAD FEEDBACK DOCUMENT** ? — **f**

**SAVE** **g**

**ENTER COMMENTS / FEEDBACK** — **h**

**POST** **i**

No comments posted

Figure 125

- f. Upload feedback documents
- g. Click **SAVE** button
- h. Enter comments/feedback
- i. Click **POST** button

## 8.6 How do I close a Background Check Process?

Please refer Figure 126

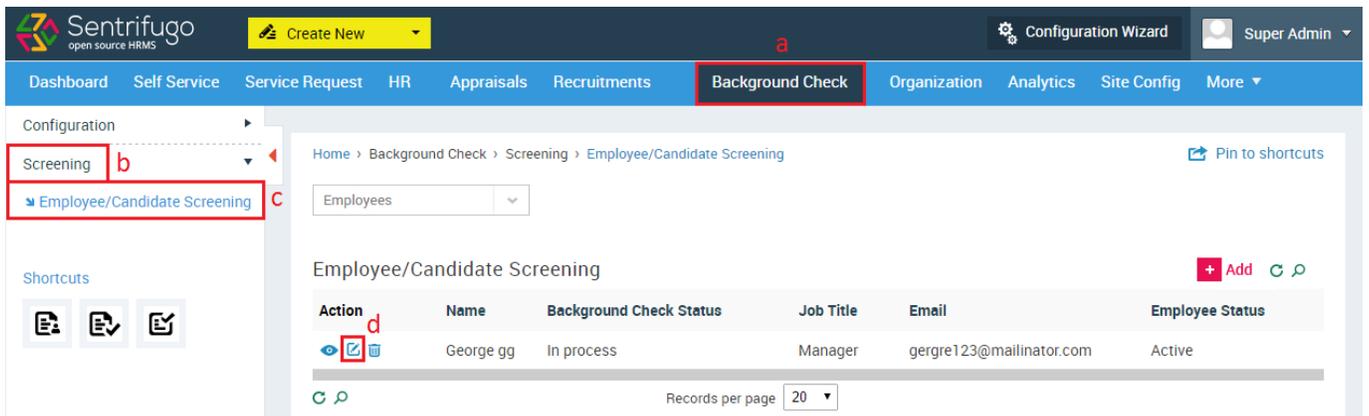


Figure 126

- a. Click **Background Check** in the top menu
- b. Click **Screening** on the left menu panel
- c. Click **Employee/Candidate Screening** in the submenu
- d. Click **Edit** icon against an employee/candidate name

Please refer Figure 127

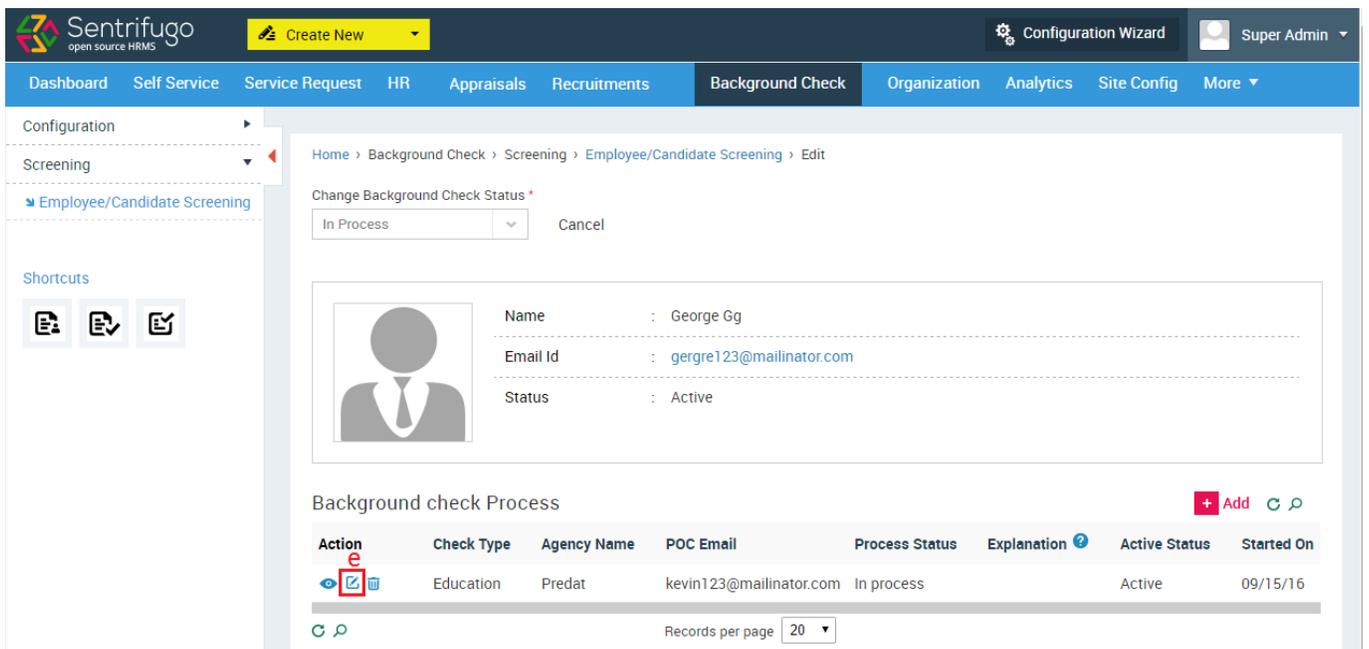


Figure 127

**To close a specific Background process:**

- e. Click on the Edit icon against an employee/candidate name in the Background Check Process Grid

Please refer Figure 128

### Background check Process ✕

Change Background Check Status \* g

Complete h **SAVE**

AGENCY & POC DETAILS

Check Type	: Education
Agency Name	: Predat
Contact Person Name	: Kevin K
Contact Number	: 1234567888
Email	: kevin123@mailinator.com
Address	: Atlanta, Atlanta, Georgia, United States

**CLOSE**

UPLOAD FEEDBACK DOCUMENT ? f

Upload Feedback File

**SAVE**

ENTER COMMENTS / FEEDBACK

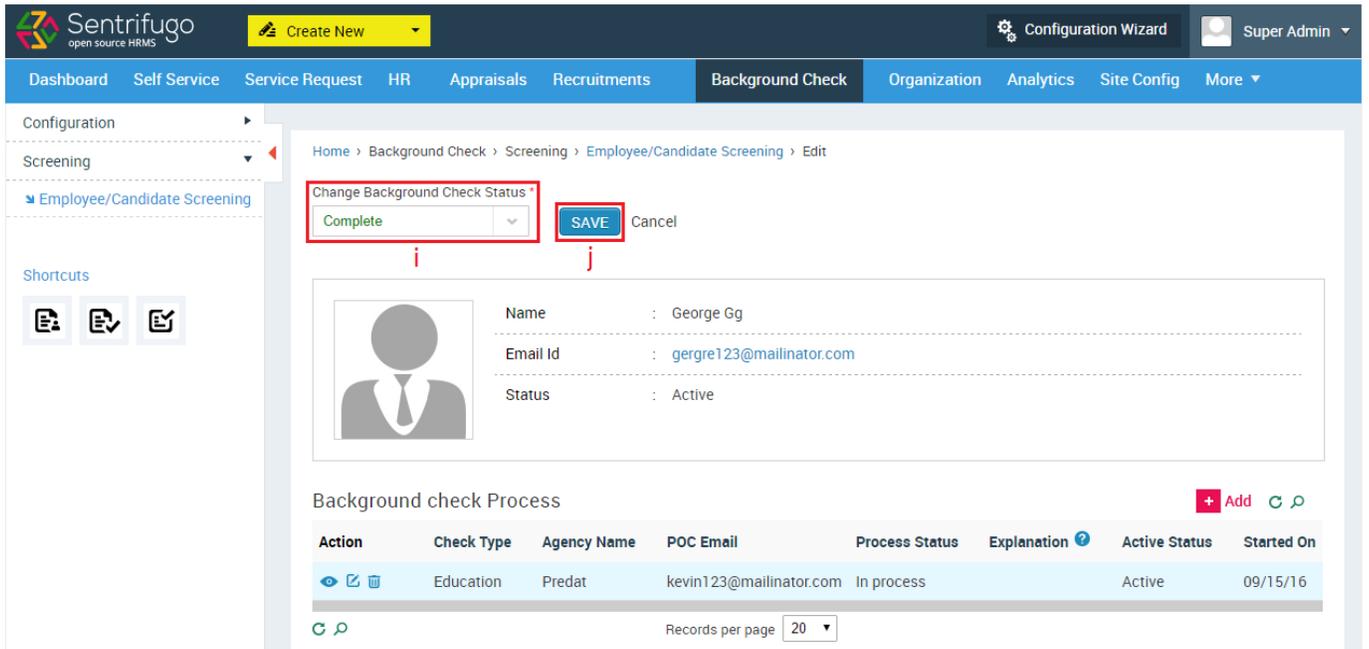
**POST**

No comments posted

Figure 128

- f. You can upload feedback documents or enter comments
- g. Select '**Complete**' for the Background Check Status
- h. Click **SAVE** button

Please refer Figure 129



Home > Background Check > Screening > Employee/Candidate Screening > Edit

Change Background Check Status \*

Complete  Cancel

i j

Name : George Gg

Email Id : [gergre123@mailinator.com](mailto:gergre123@mailinator.com)

Status : Active

Background check Process + Add ↻

Action	Check Type	Agency Name	POC Email	Process Status	Explanation	Active Status	Started On
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	Education	Predat	kevin123@mailinator.com	In process		Active	09/15/16

Records per page 20

Figure 130

**To close all Background processes for an employee:**

- i. Select **'Complete'** for the Background Check Status
- j. Click **SAVE** button

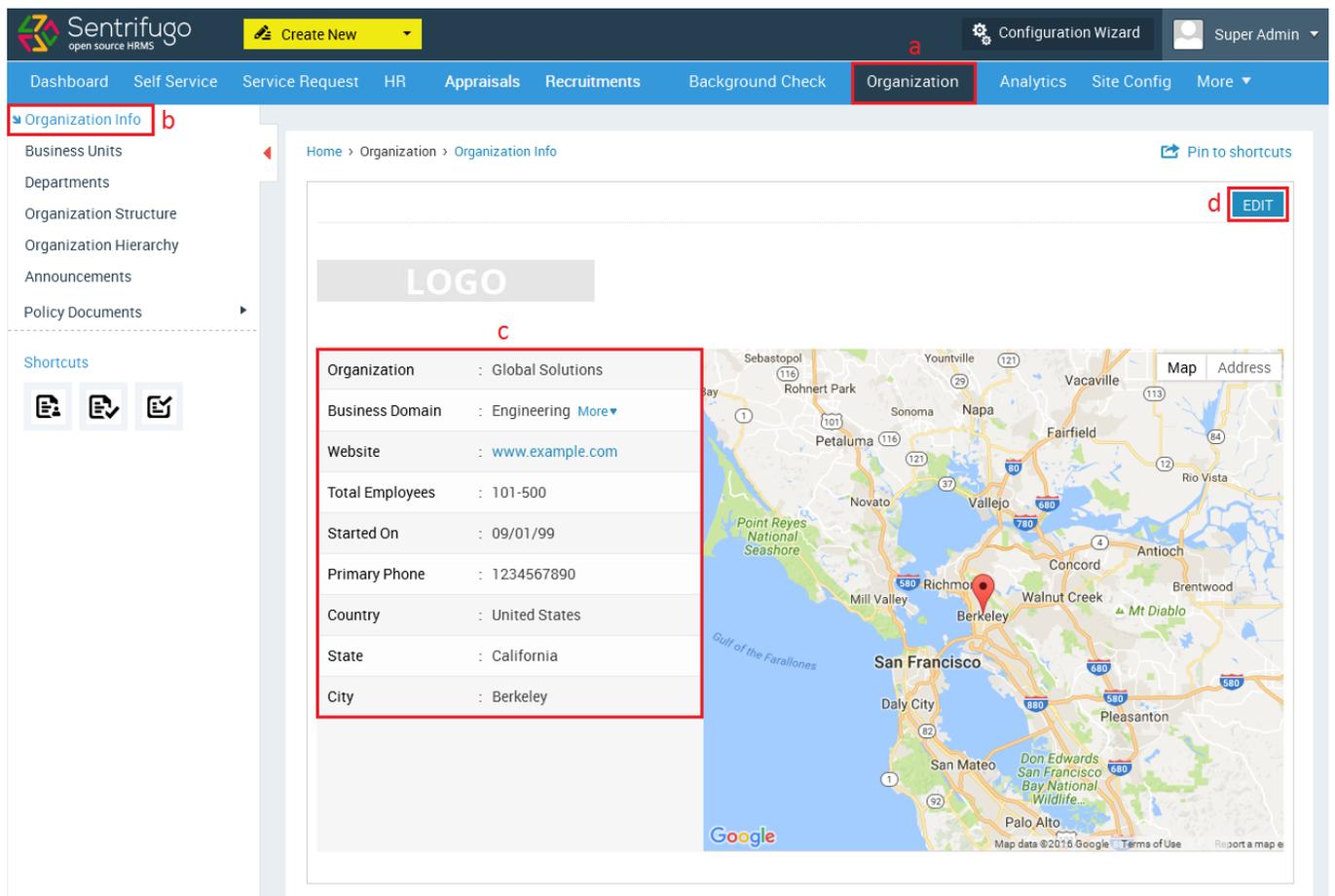
## 9. Organization

Organization lets you can manage your organizational information, Business Units and Departments, Announcements and Policy Documents.

### 9.1 How do I view/edit information about my Organization?

This information was first given in the Step 3: Organization of the Configuration Wizard.

Please refer Figure 131



Organization Info

Home > Organization > Organization Info

LOGO

Organization	: Global Solutions
Business Domain	: Engineering <a href="#">More</a>
Website	: <a href="#">www.example.com</a>
Total Employees	: 101-500
Started On	: 09/01/99
Primary Phone	: 1234567890
Country	: United States
State	: California
City	: Berkeley

EDIT

Figure 131

- Click **Organization** in the top menu
- Click **Organization Info** on the left menu panel
- Your organization's details will be displayed here
- Click **Edit** icon to modify details

Please refer Figure 132

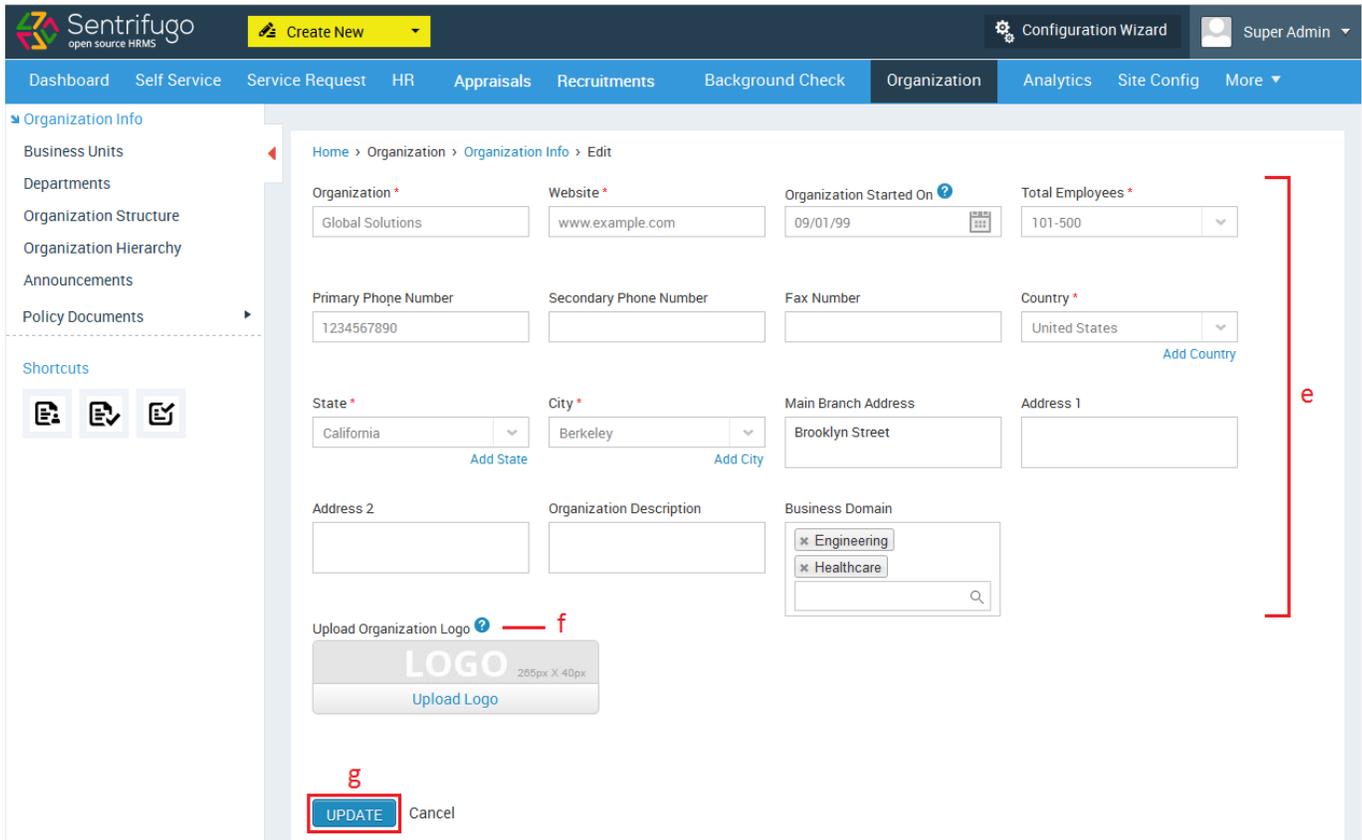


Figure 132

- e. Enter or modify details
- f. You can change your company logo
- g. Click **UPDATE** button

## Business Units & Departments

Please refer to section [1.5 How do I add Business Units and Departments?](#)

### 9.2 How do I view my Organization Structure?

Please refer Figure 133

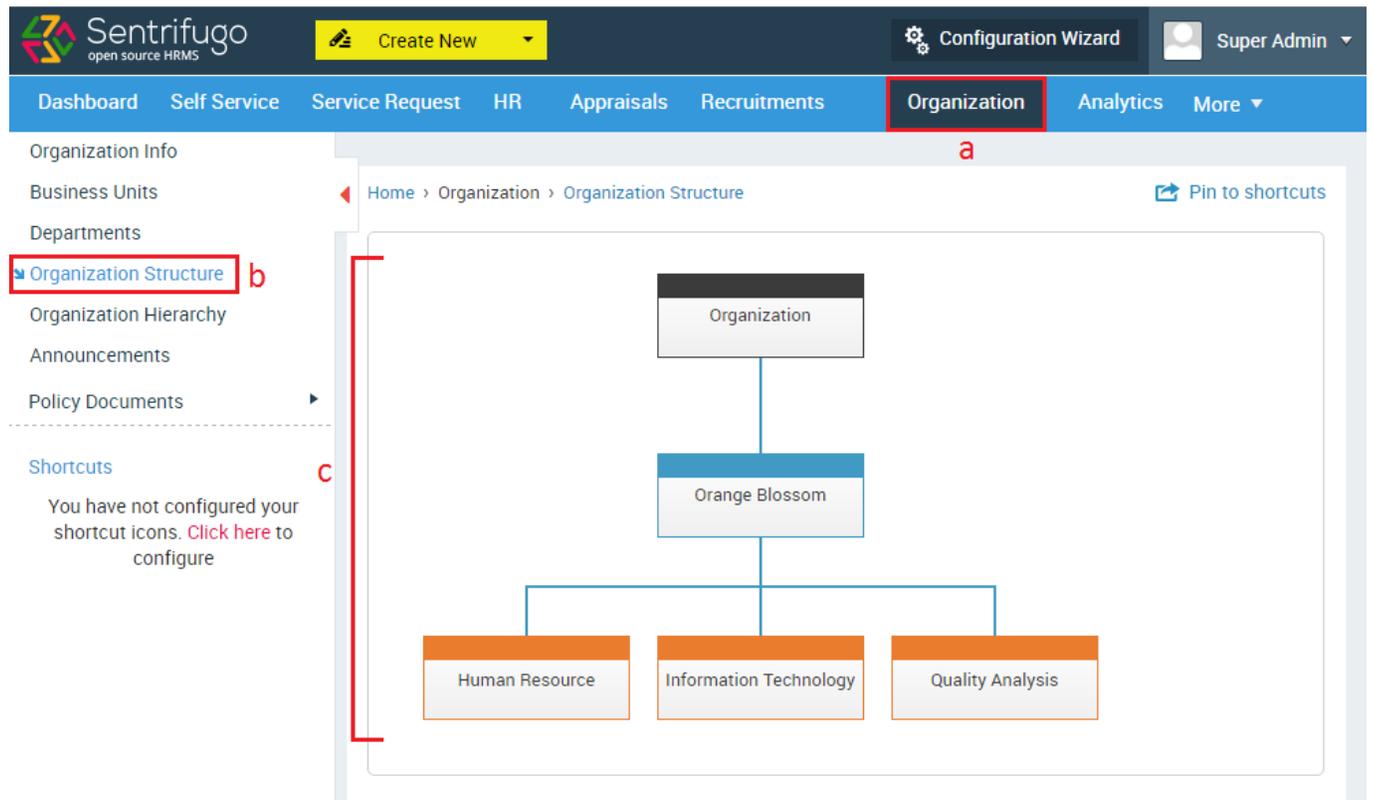


Figure 133

- a. Click **Organization** in the top menu
- b. Click **Organization Structure** on the left side panel
- c. Your Organization Structure will be displayed here



The Organization Structure is for display purpose only and cannot be edited. It is formed according to the Business Units and Departments you add in the application.

### 9.3 How do I view my Organization Hierarchy?

Please refer Figure 134

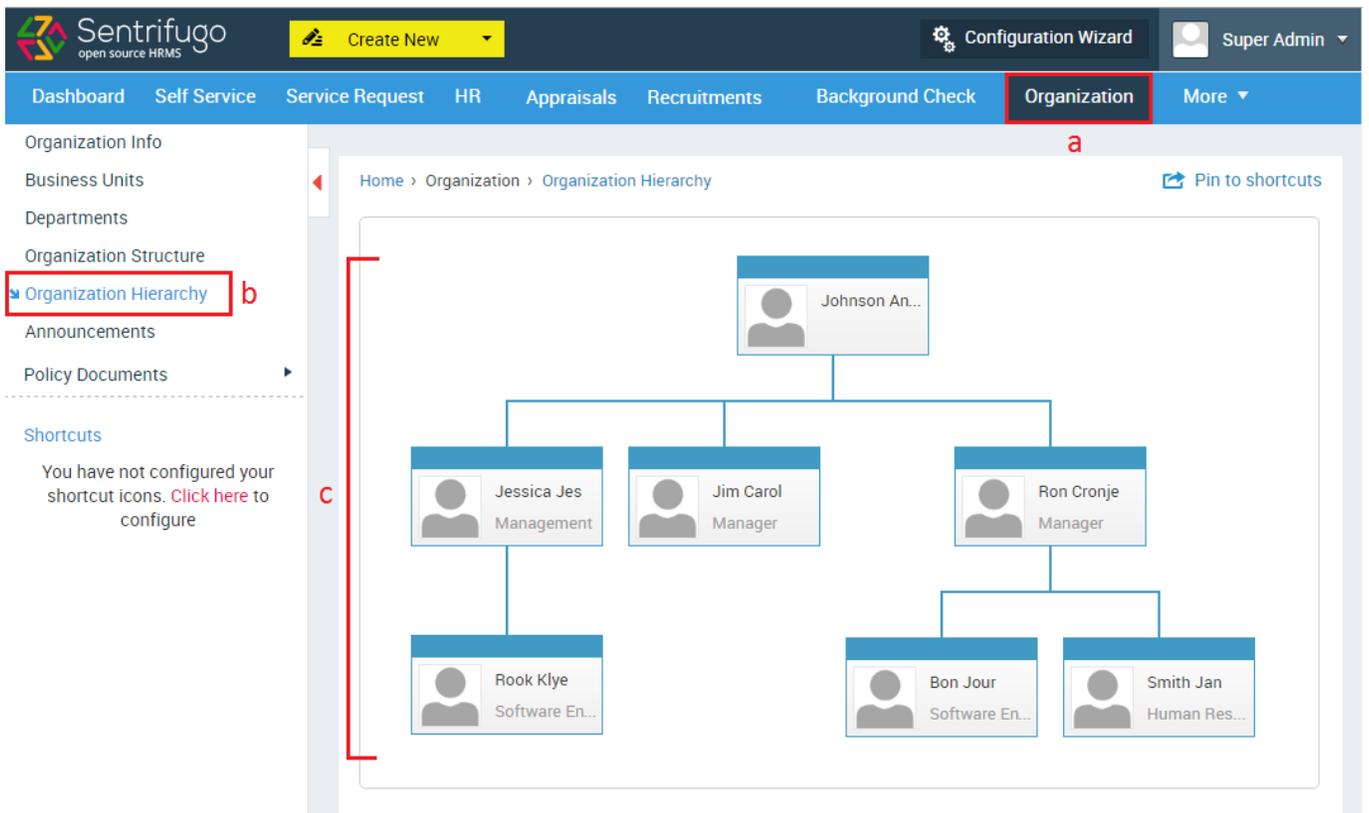


Figure 134

- a. Click **Organization** in the top menu
- b. Click **Organization Hierarchy** on the left menu panel
- c. Your Organization Hierarchy will be displayed here



The Organization Hierarchy is for display purpose only and cannot be edited. It is formed according to the employees you add to the application.

## 9.4 How do I add Announcements?

Refer section [How do I add Announcements?](#)

## 9.5 How do I add Policy Documents?

Users will have access to view essential documents whenever required. You can easily access & store all the organization's important policy documents

Please refer Figure 135

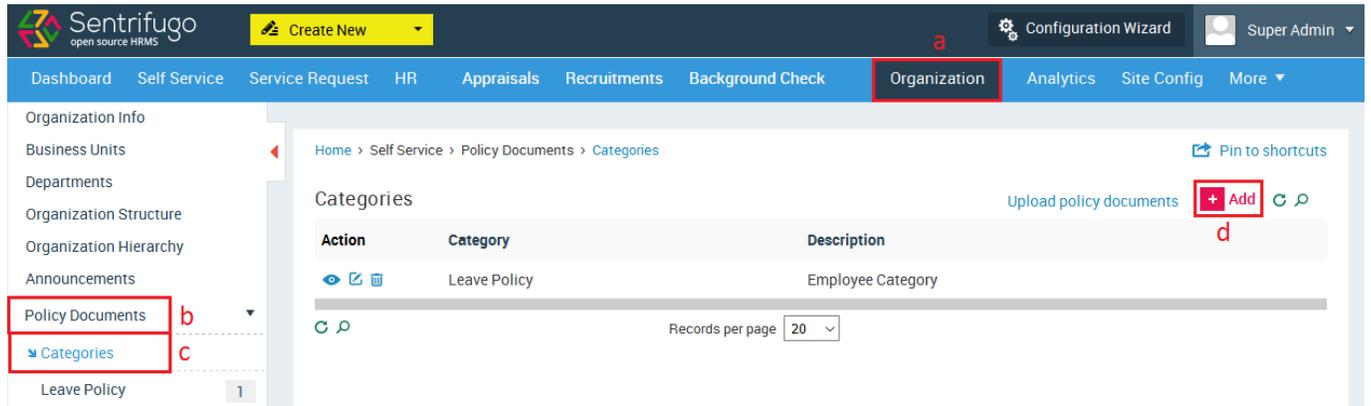


Figure 135

- a. Click **Organization** menu option
- b. Click **Policy Documents** on the left menu panel
- c. Click **Categories** in the submenu
- d. Click **+Add** button on the right side

Please refer Figure 136

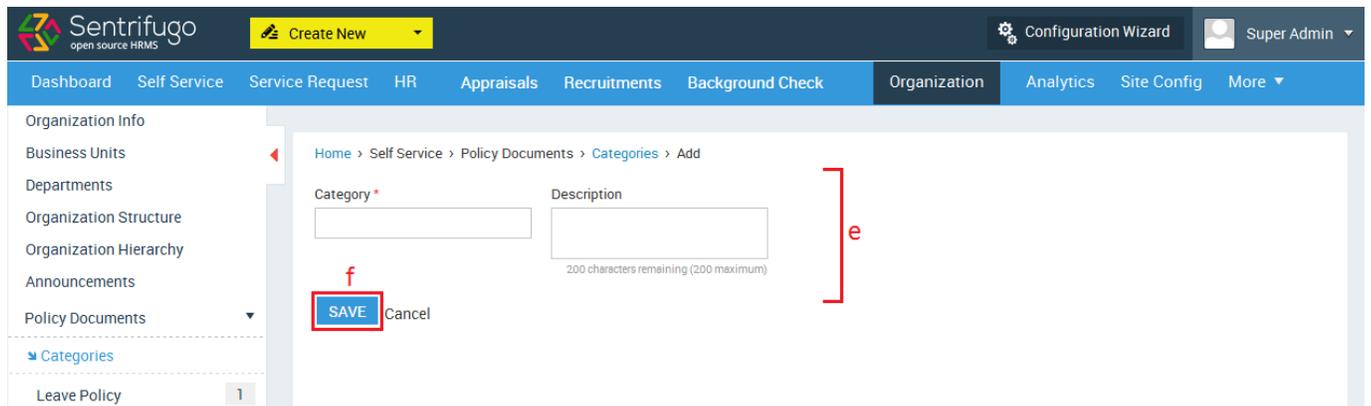


Figure 136

- e. Enter the required details
- f. Click **SAVE** button

Please refer Figure 137

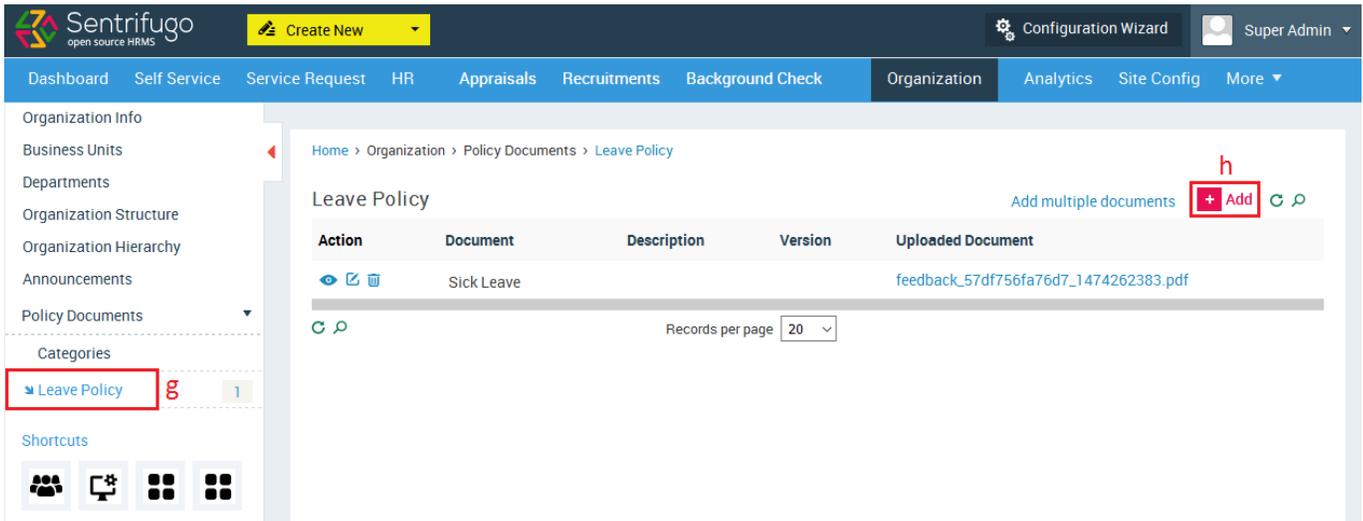


Figure 137

- g. Click on the category name in the sub menu (we have selected 'Leave Policy' as an example)
- h. Click **+Add** button

Please refer Figure 138

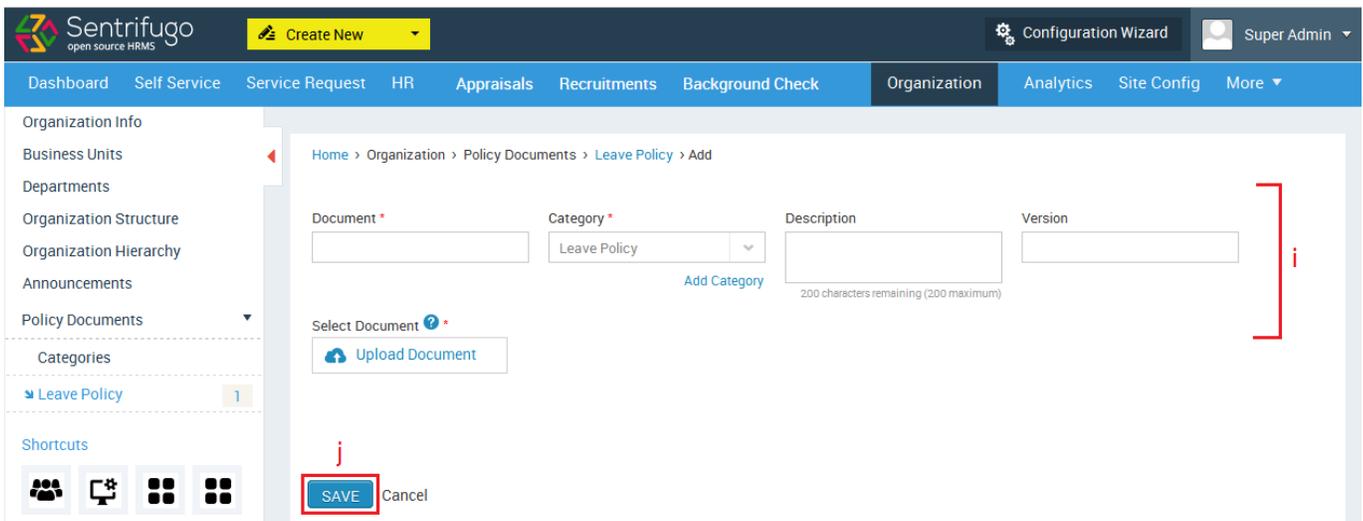
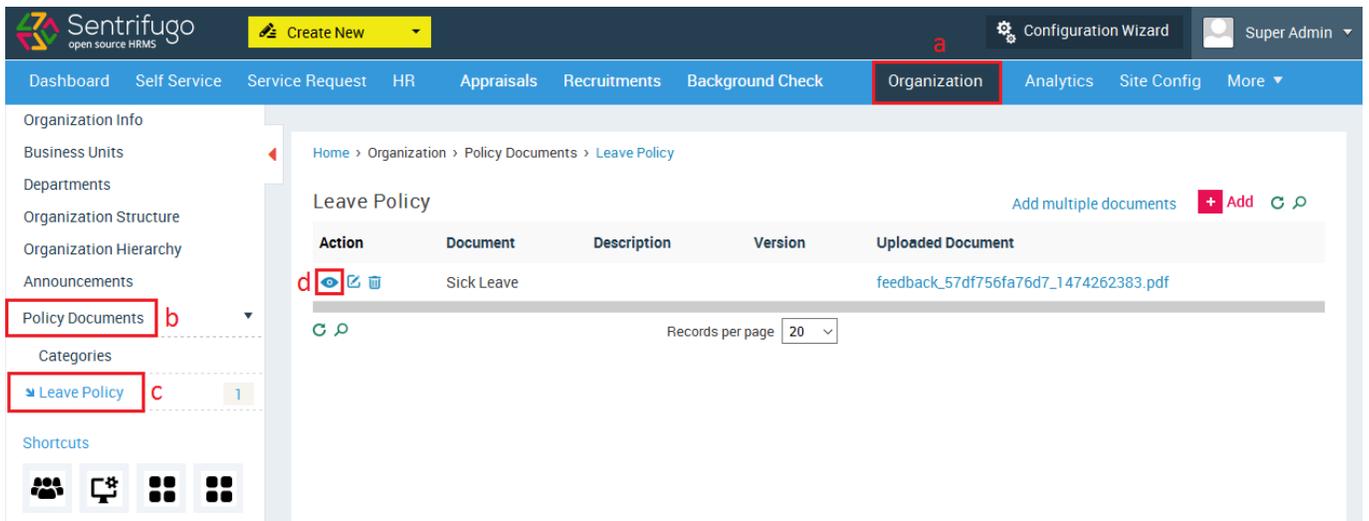


Figure 138

- i. Enter the required details
- j. Click **+Add** button

## 9.6 How do I view Policy Documents?

Please refer Figure 139



Home > Organization > Policy Documents > Leave Policy

Leave Policy Add multiple documents + Add ↻ ↻

Action	Document	Description	Version	Uploaded Document
<span>ⓧ</span> <span>👁</span> <span>🗑</span>	Sick Leave			feedback_57df756fa76d7_1474262383.pdf

Records per page

Figure 139

- a. Click **Organization** in the top menu
- b. Click **Policy Documents** on the left menu panel
- c. Click on the category name you want to view (We have used 'Leave Policy' here as an example)
- d. Click on the **View** icon against a document name



If a user is not able to view Policy Documents, go to HR > User Management > Roles & Privileges and check whether the user's role has been granted privilege to view Policy Documents.

## 10. Analytics

Analytics uses descriptive techniques to represent your organization's data and allows you to generate custom reports and then export them to Excel or PDF.

You organizational data such as Employee Status, Employees on Leave, Attrition Rate will be presented in the form of pie charts, line and bar graphs. Click on **Analytics** in the top menu option to view the charts/graphs.

### 10.1 How do I view/generate Reports?

*Please refer Figure 140*

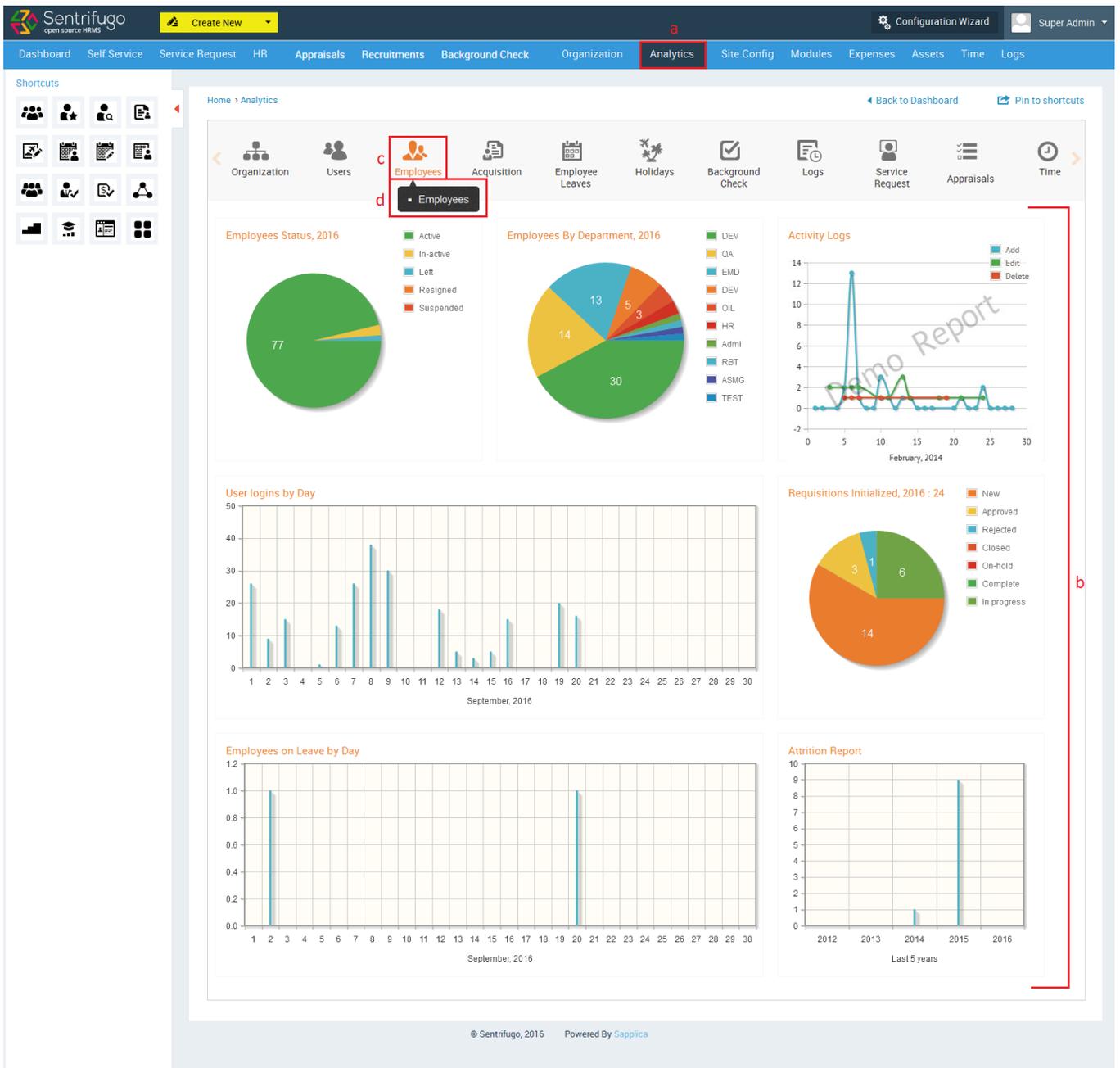
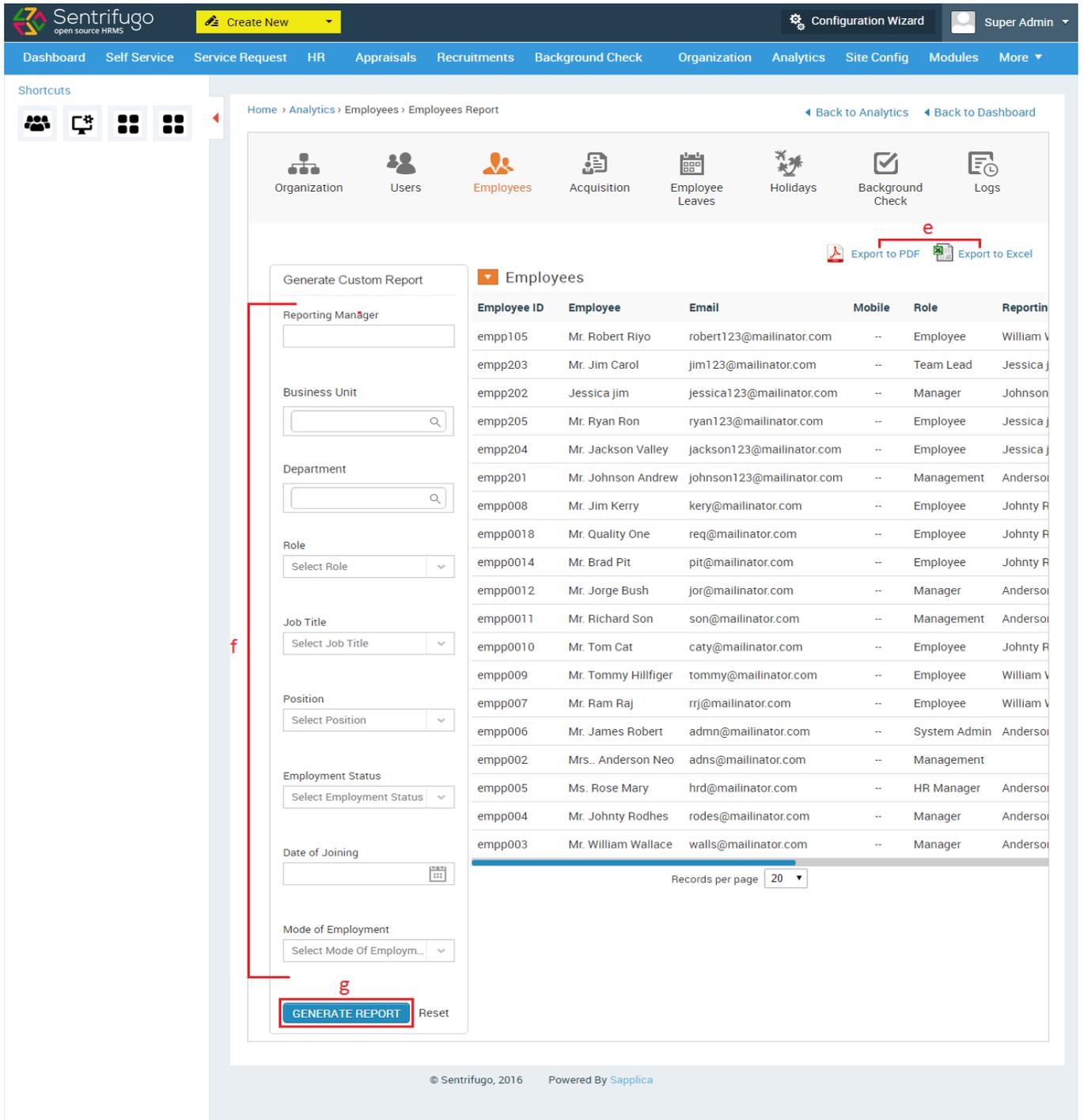


Figure 140

- a. Click **Analytics** in the top menu
- b. You will be redirected to Analytics page where graphical representation of organization statistics are displayed
- c. Click on a menu item in the Analytics menu
- d. Click on the corresponding submenu

Please refer Figure 141



Home > Analytics > Employees > Employees Report

Organization Users **Employees** Acquisition Employee Leaves Holidays Background Check Logs

Export to PDF Export to Excel

Generate Custom Report

Reporting Manager

Business Unit

Department

Role

Job Title

Position

Employment Status

Date of Joining

Mode of Employment

**GENERATE REPORT** Reset

Employee ID	Employee	Email	Mobile	Role	Reporting
empp105	Mr. Robert Riyo	robert123@mailinator.com	--	Employee	William V
empp203	Mr. Jim Carol	jim123@mailinator.com	--	Team Lead	Jessica j
empp202	Jessica jim	jessica123@mailinator.com	--	Manager	Johnson
empp205	Mr. Ryan Ron	ryan123@mailinator.com	--	Employee	Jessica j
empp204	Mr. Jackson Valley	jackson123@mailinator.com	--	Employee	Jessica j
empp201	Mr. Johnson Andrew	johnson123@mailinator.com	--	Management	Anderson
empp008	Mr. Jim Kerry	kery@mailinator.com	--	Employee	Johnty P
empp0018	Mr. Quality One	req@mailinator.com	--	Employee	Johnty P
empp0014	Mr. Brad Pit	pit@mailinator.com	--	Employee	Johnty P
empp0012	Mr. Jorge Bush	jor@mailinator.com	--	Manager	Anderson
empp0011	Mr. Richard Son	son@mailinator.com	--	Management	Anderson
empp0010	Mr. Tom Cat	caty@mailinator.com	--	Employee	Johnty P
empp009	Mr. Tommy Hillfiger	tommy@mailinator.com	--	Employee	William V
empp007	Mr. Ram Raj	rrj@mailinator.com	--	Employee	William V
empp006	Mr. James Robert	adm@mailinator.com	--	System Admin	Anderson
empp002	Mrs.. Anderson Neo	adns@mailinator.com	--	Management	
empp005	Ms. Rose Mary	hrd@mailinator.com	--	HR Manager	Anderson
empp004	Mr. Johnty Rodhes	rodes@mailinator.com	--	Manager	Anderson
empp003	Mr. William Wallace	walls@mailinator.com	--	Manager	Anderson

Records per page 20

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Figure 141

- e. In the selected submenu page, click on Export to PDF or Export to Excel to generate report  
Or, to generate custom reports
- f. Provide the specifications required to generate report
- g. Click **GENERATE REPORT** to generate a custom report

# 11. Site Config

Site Configuration allows you to configure the standards used in your organization such as locations, currency codes, date formats, ethnic codes, etc.

## 11.1 How do I view/edit Site Preferences?

This information was first given in the Step 2: Site Config of the Configuration Wizard.

*Please refer Figure 142*

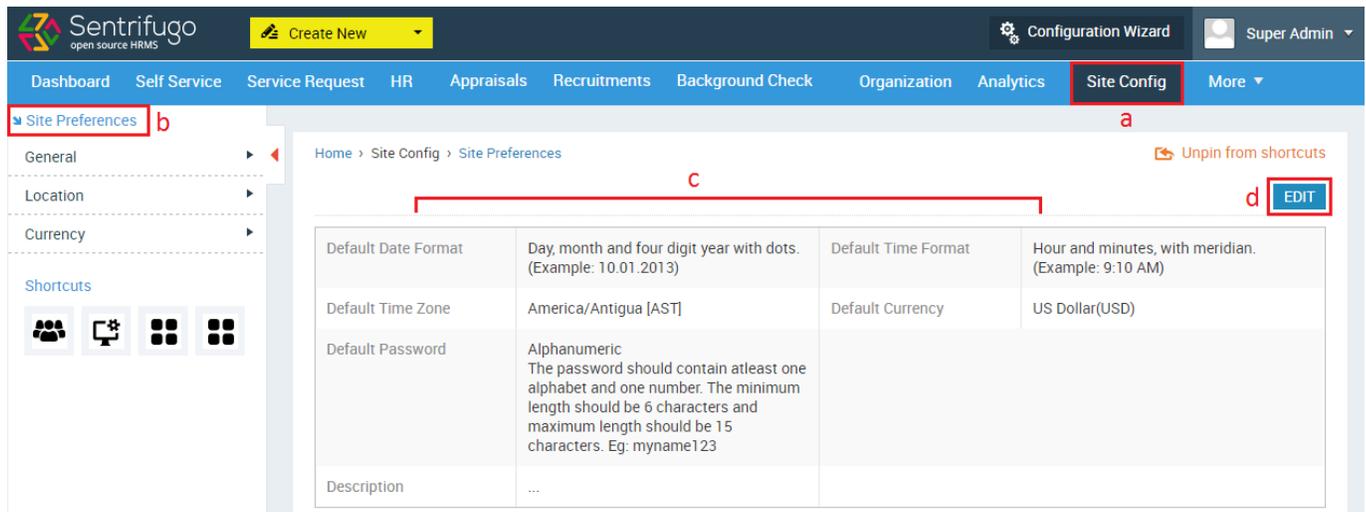


Figure 142

- a. Click **Site Config** in the top menu
- b. Click **Site Preferences** in the left menu panel
- c. You can view your Site Preference details here
- d. Click **Edit** icon

Please refer Figure 143

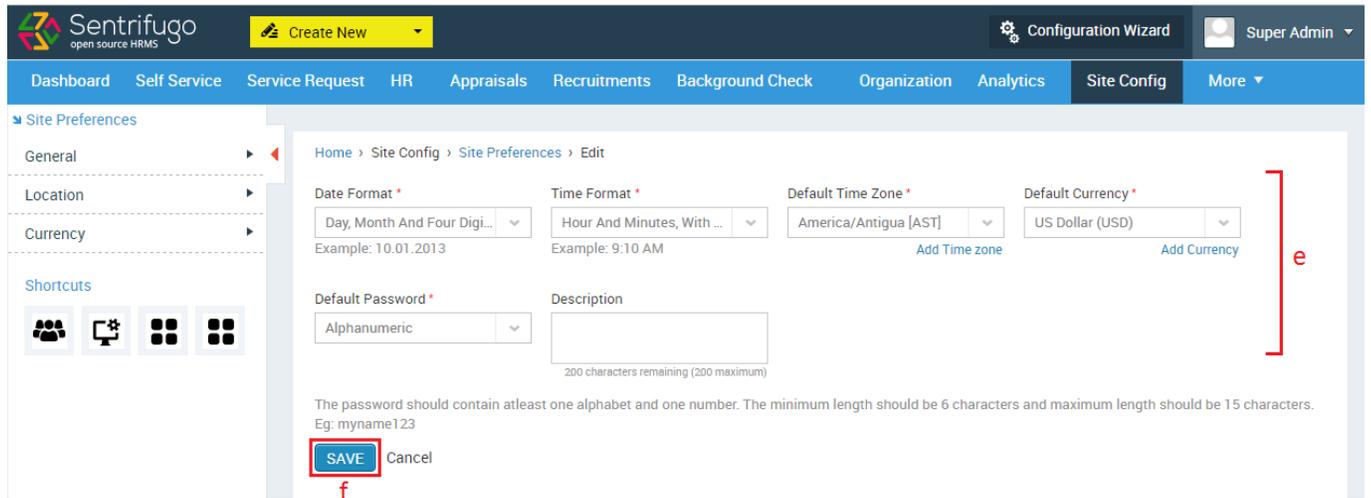


Figure 143

- e. Enter/Edit the details
- f. Click **SAVE** button

## 11.2 How do I set General Site Preferences?

You can set general preferences like time zones, nationalities, gender codes, ethnic codes etc. which will be consistent across the entire application.

Please refer Figure 144

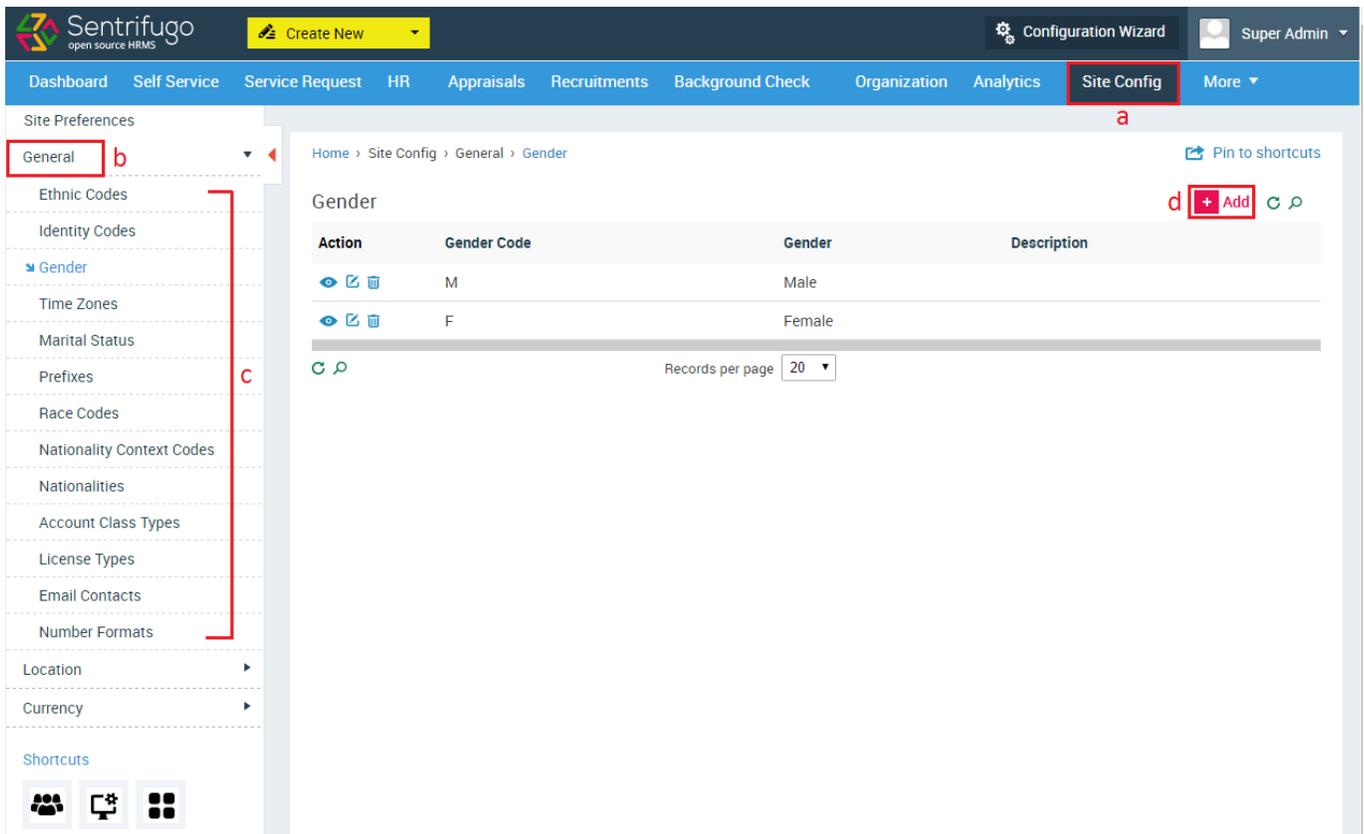


Figure 144

- a. Click **Site Config** in the top menu
- b. Click **General** on the left menu panel
- c. Click on any option in the submenu (We've used Gender as an example)
- d. Click **+Add** button

Please refer Figure 145

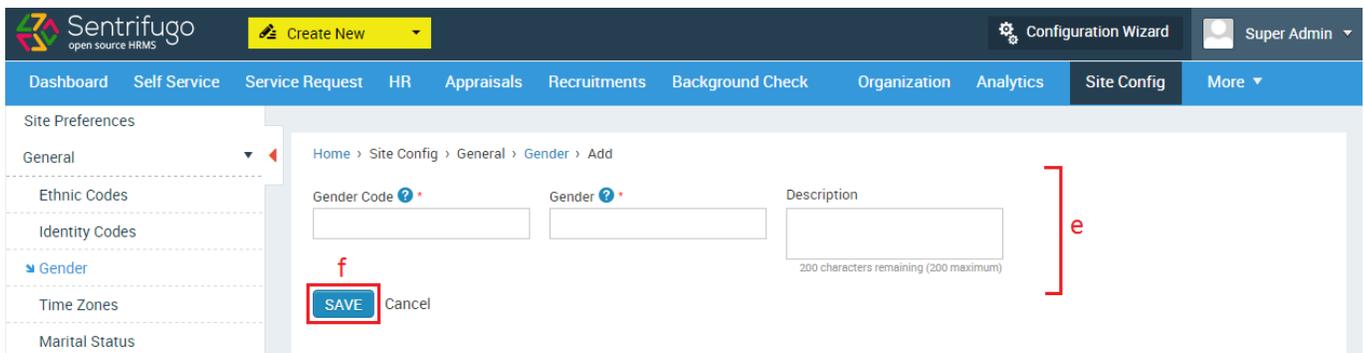


Figure 145

- e. Enter/Edit the details
- f. Click **SAVE** button

## 11.3 How do I set Identity Codes?

Identity code is the alphabets used in an Employee ID. For example in the Employee IDs **EMP0033** and **USER009**, EMP and USER are the identity codes respectively.

Please refer Figure 146

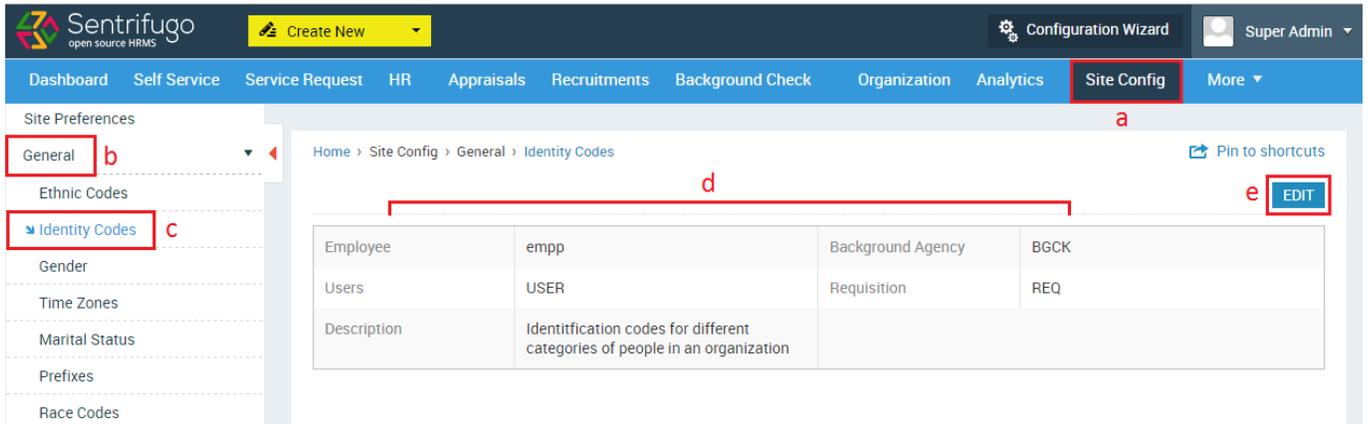


Figure 146

- Click **Site Config** in the top menu
- Click **General** on the left menu panel
- Click **Identity Codes** in the submenu
- Your default identity code details will be displayed here
- Click **Edit icon**

Please refer Figure 147

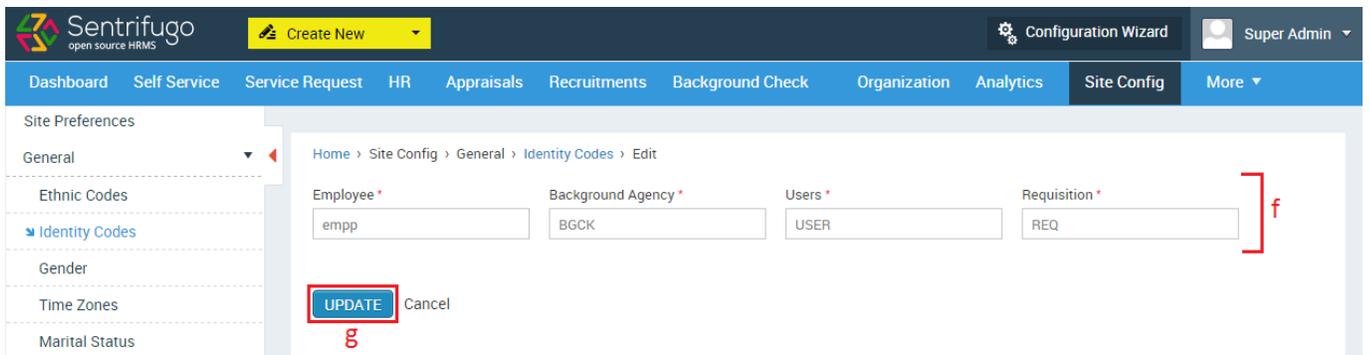


Figure 147

- Edit the details
- Click **SAVE** button

## 11.4 What should I do if my Country/State/City are not available in Sentrifugo?

Please refer Figure 148

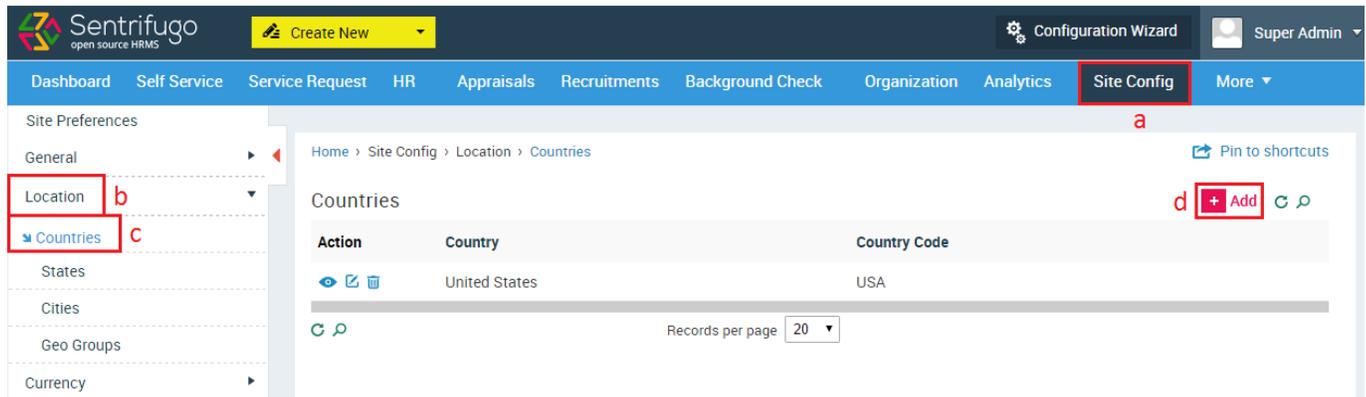


Figure 148

- a. Click **Site Config** in the top menu
- b. Click **Location** on the left menu panel
- c. Click **Countries** in the submenu
- d. Click **+Add** button

Please refer Figure 149

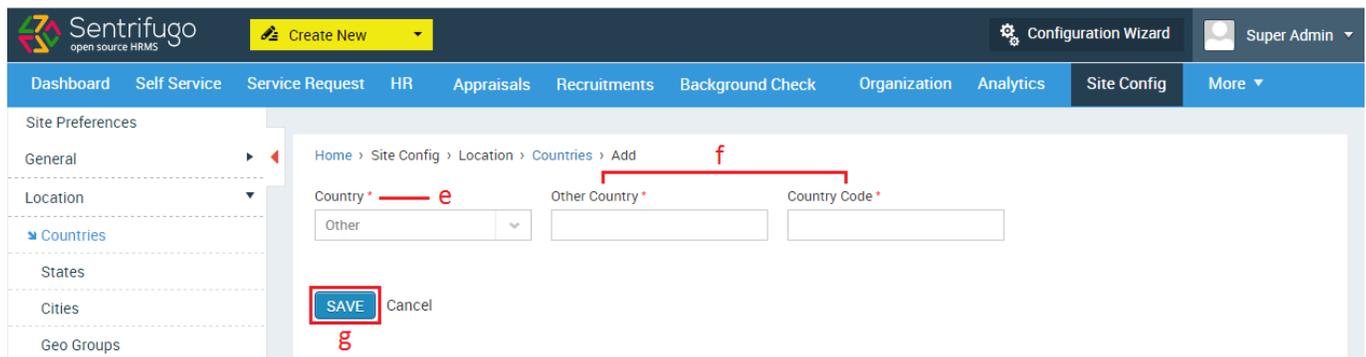


Figure 149

- e. Select 'Other' in the Country field
- f. Provide Other Country name and code
- g. Click **SAVE** button

Once an unavailable 'Country' name is added, it will be appear in the drop down option when you want to add a state or city. You can use the same procedure shown above to add States and Cities not available in the application.

## 11.5 How do I add Currency and Currency Conversions?

### Currencies

Please refer Figure 150

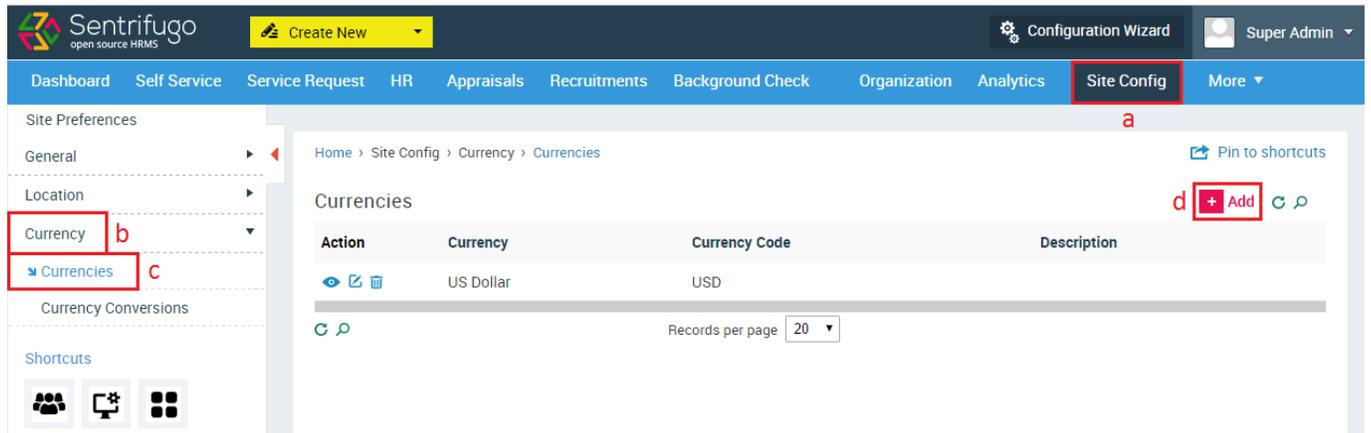


Figure 150

- Click **Site Config** in the top menu
- Click **Currency** on the left menu panel
- Click **Currencies** in the submenu
- Click **+Add** button

Please refer Figure 151

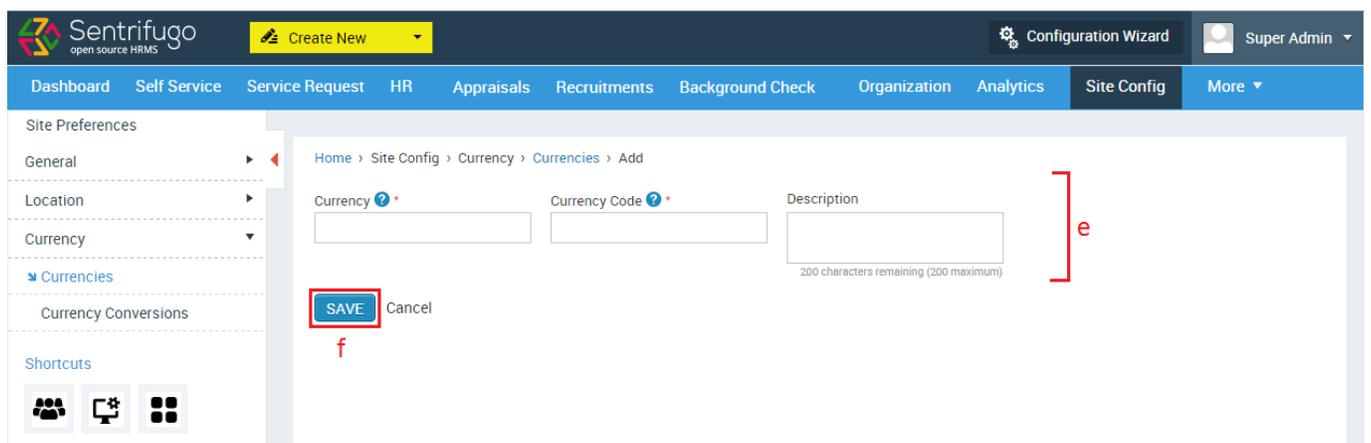


Figure 151

- Enter the required details
- Click **SAVE** button

## Currency Conversions

Please refer Figure 152

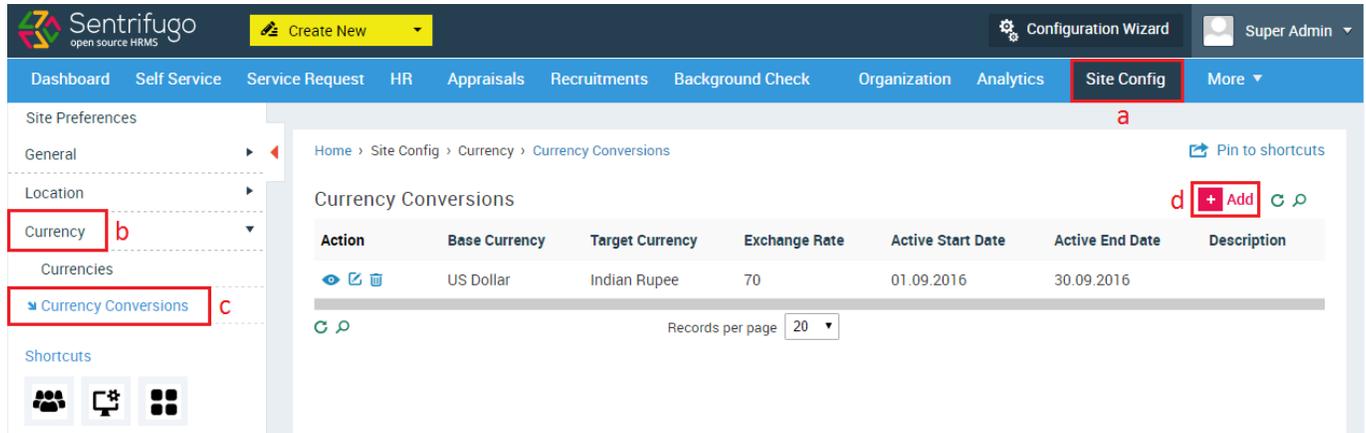


Figure 152

- Click **Site Config** menu option
- Click **Currency** on the left menu panel
- Click **Currency Conversions** in the submenu
- Click **+Add** button

Please refer Figure 153

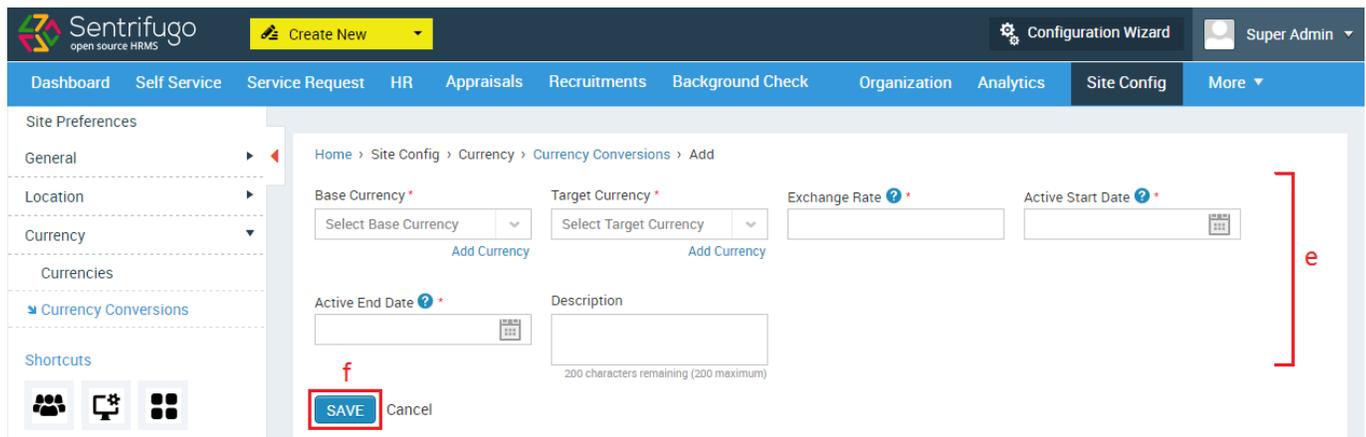


Figure 153

- Enter the required details
- Click **SAVE** button

## 12. Modules

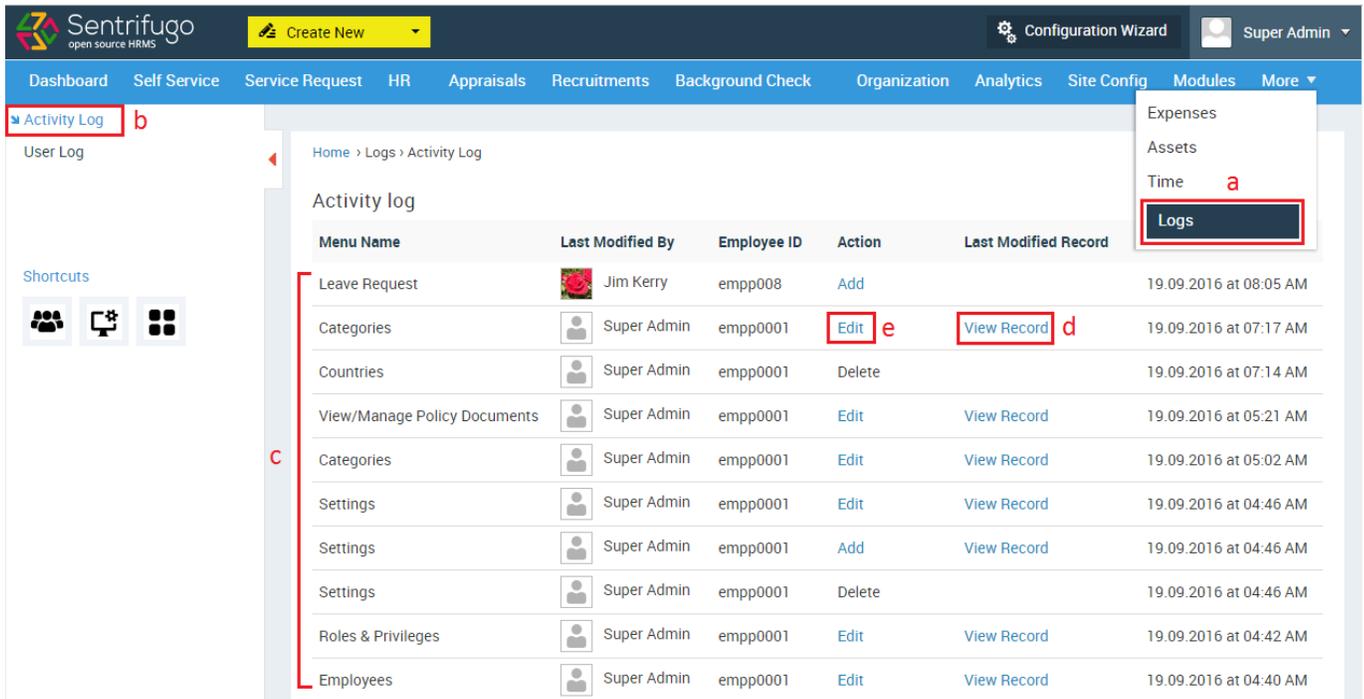
Please refer section [1.3.1 Configuration Wizard: Step 1](#)

## 13. Logs

Logs allow you to check the amount of activity happening on the application along with the daily users' login record.

### 13.1 How do I view Activity Logs?

Please refer Figure 154



Menu Name	Last Modified By	Employee ID	Action	Last Modified Record
Leave Request	Jim Kerry	empp008	Add	19.09.2016 at 08:05 AM
Categories	Super Admin	empp0001	Edit <b>e</b>	View Record <b>d</b> 19.09.2016 at 07:17 AM
Countries	Super Admin	empp0001	Delete	19.09.2016 at 07:14 AM
View/Manage Policy Documents	Super Admin	empp0001	Edit	View Record 19.09.2016 at 05:21 AM
Categories	Super Admin	empp0001	Edit	View Record 19.09.2016 at 05:02 AM
Settings	Super Admin	empp0001	Edit	View Record 19.09.2016 at 04:46 AM
Settings	Super Admin	empp0001	Add	View Record 19.09.2016 at 04:46 AM
Settings	Super Admin	empp0001	Delete	19.09.2016 at 04:46 AM
Roles & Privileges	Super Admin	empp0001	Edit	View Record 19.09.2016 at 04:42 AM
Employees	Super Admin	empp0001	Edit	View Record 19.09.2016 at 04:40 AM

Figure 154

- Click **Logs** in the top menu
- Click **Activity Log** in the left menu panel
- You can view the activity logs here
- Click on **View Record** to view the modified record.
- Click on the action (Add/Edit/Cancel) option to view the employees who performed those actions in that menu.

On clicking **action (Edit/Add)** option, a small window will open:

**Categories - Edit** ✕

User	Employee ID	Date	Record
Super Admin	empp0001	19.09.2016 at 07:17 AM	<a href="#">View Record</a>

Records per page

CLOSE

Clicking **View Record** will take you to the record's page.

## 13.2 How do I view User Logs?

Please refer Figure 155

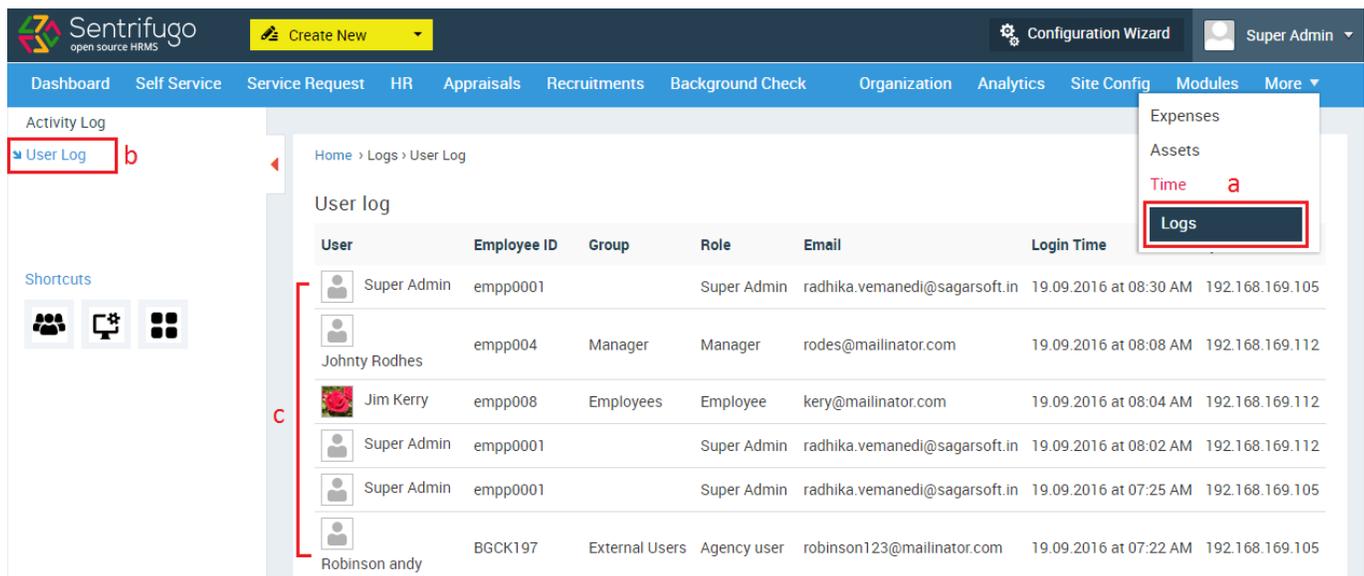
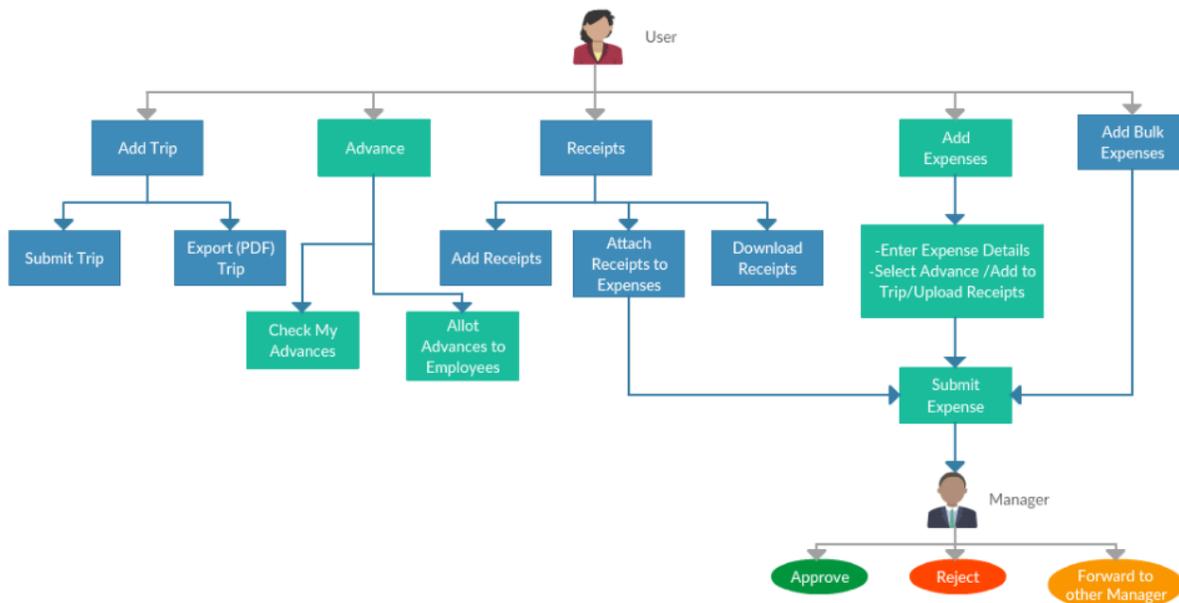


Figure 155

- a. Click on Logs in the top menu
- b. Click on User log in the left panel
- c. You can view the user logs here

## 14. Expenses

Expenses allows you to manage your expenses, trip budgets, advances and receipts. You can create and send your expenses for approval to your Reporting Manager. Expenses can be placed into various categories such as food, travel, entertainment etc.



### Process Description:

- User (Any user with a reporting manager) can add a new Trip
  - User can submit the Trip for approval
  - User can export the trip as an expense
- Advances
  - User can check the advances allotted to him/her
  - User can allot advances to employees reporting to him/her
- Receipts
  - User can add/upload receipts
  - User can attach receipts to expenses
  - User can download existing receipts
- User can add expenses
  - User will need to enter expense details
  - User can select an advance amount/add the expense to a trip/upload receipts (optional)
  - User can then submit his/her expense
  - The user's reporting manager receives the user's expense request, he/she can:
    - Approve the expense
    - Reject the expense
    - Forward the expense to another manager who can perform the actions on his/her behalf. (The other manager also has the same options i.e Approve/Reject/Forward)

Note: There is no limit on how many times an expense can be forwarded.

## 14.1 How do I add an Expense Category?

Please refer Figure 156

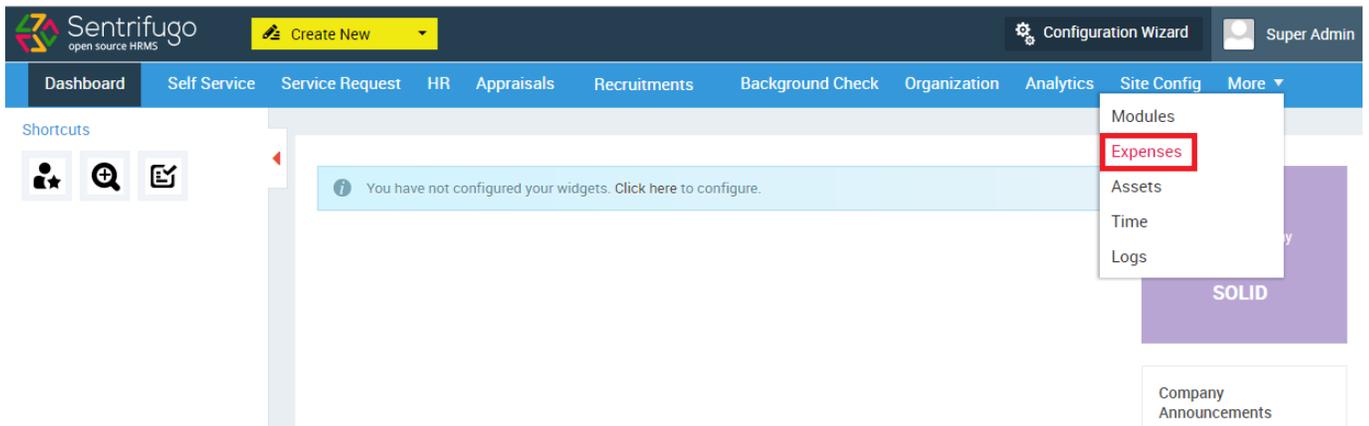


Figure 156

- a. Click **Expenses** in the top menu

Please refer Figure 157

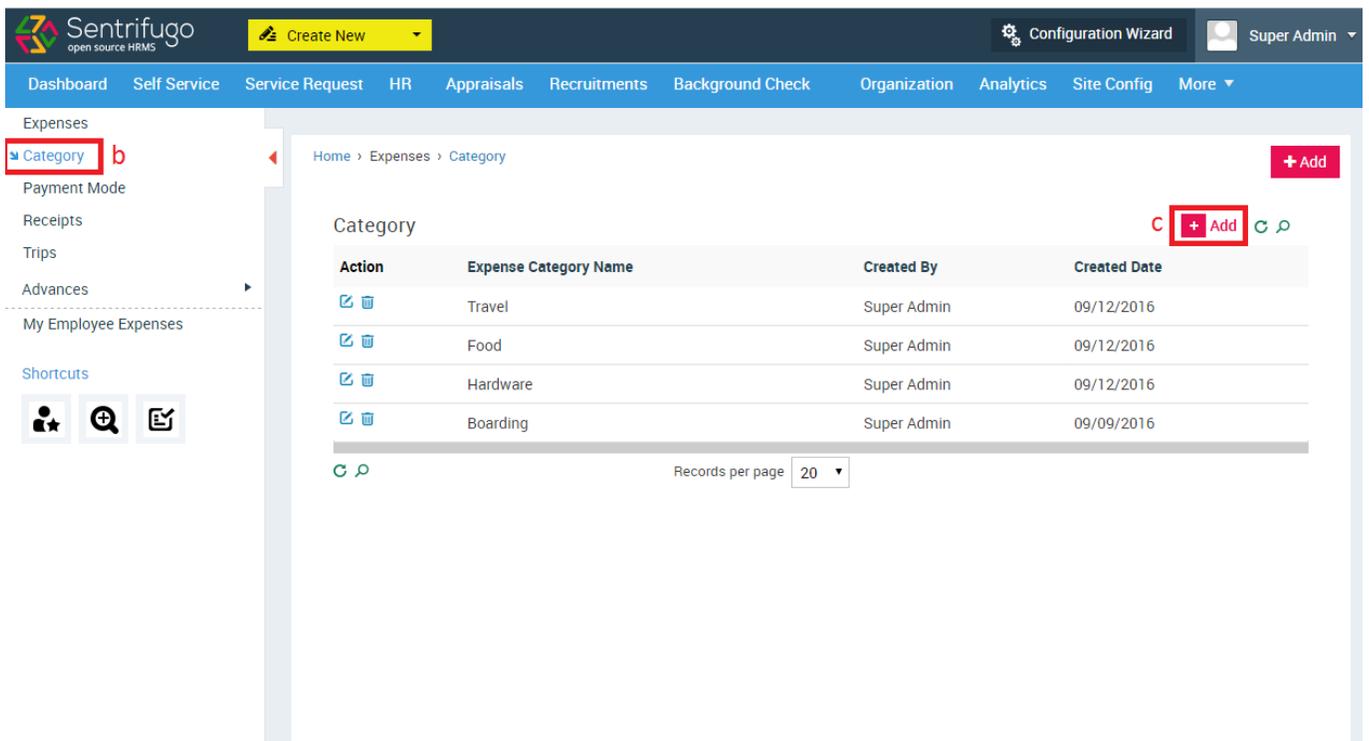


Figure 157

- b. Click **Category** on the left menu panel

c. Click **+Add** button on the right side

Or

Please refer Figure 158

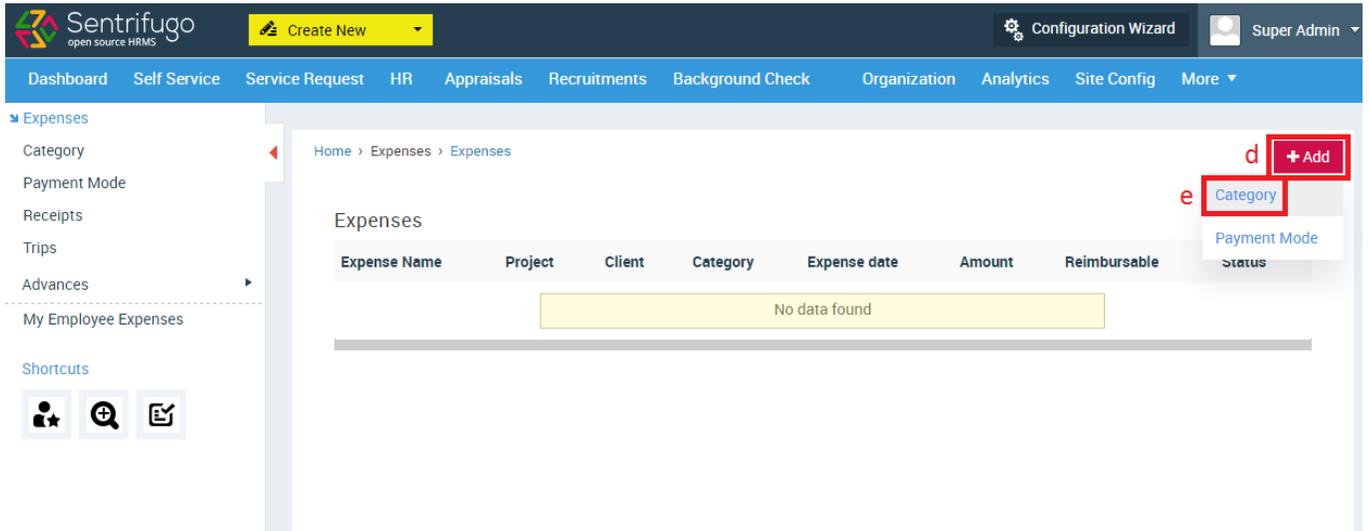


Figure 158

d. Click **+Add** on the top right corner

e. Select **Category**

Please refer Figure 159

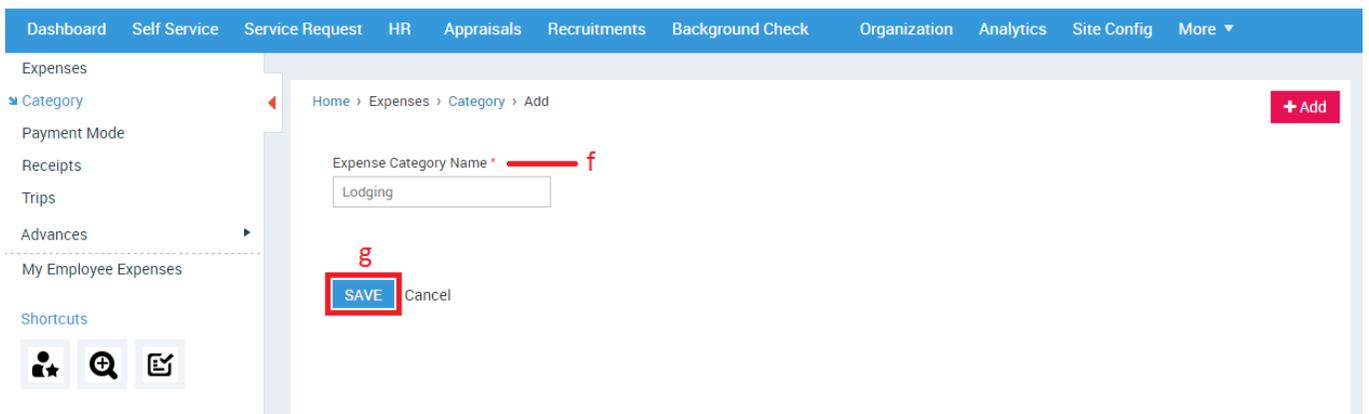


Figure 159

f. Enter Category name

g. Click **SAVE** button

## 14.2 How do I add a Payment Mode?

The method of payment for example: credit card, net banking, cash etc.

Please refer Figure 160

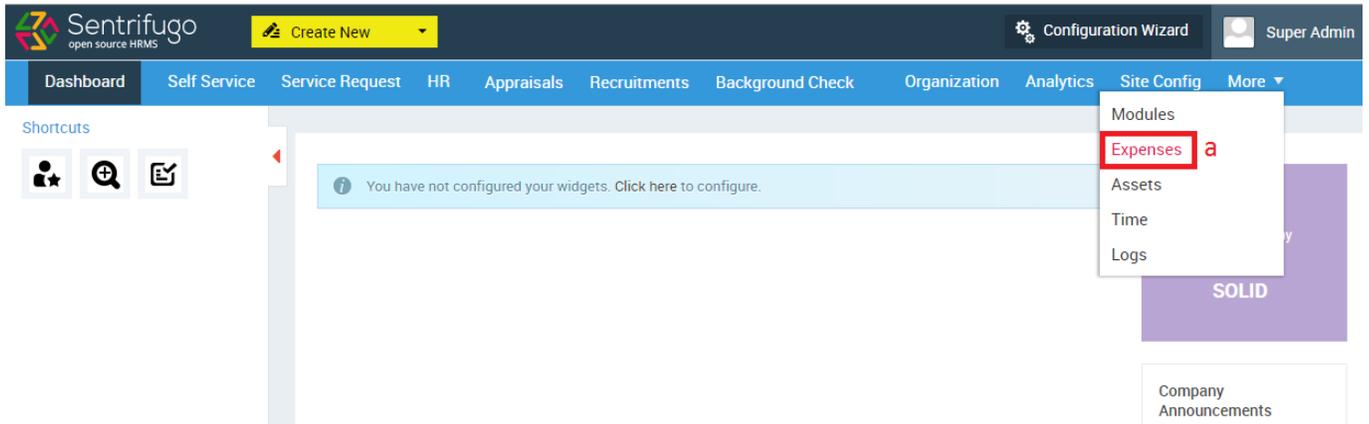


Figure 160

- a. Click **Expenses** in the top menu

Please refer Figure 161

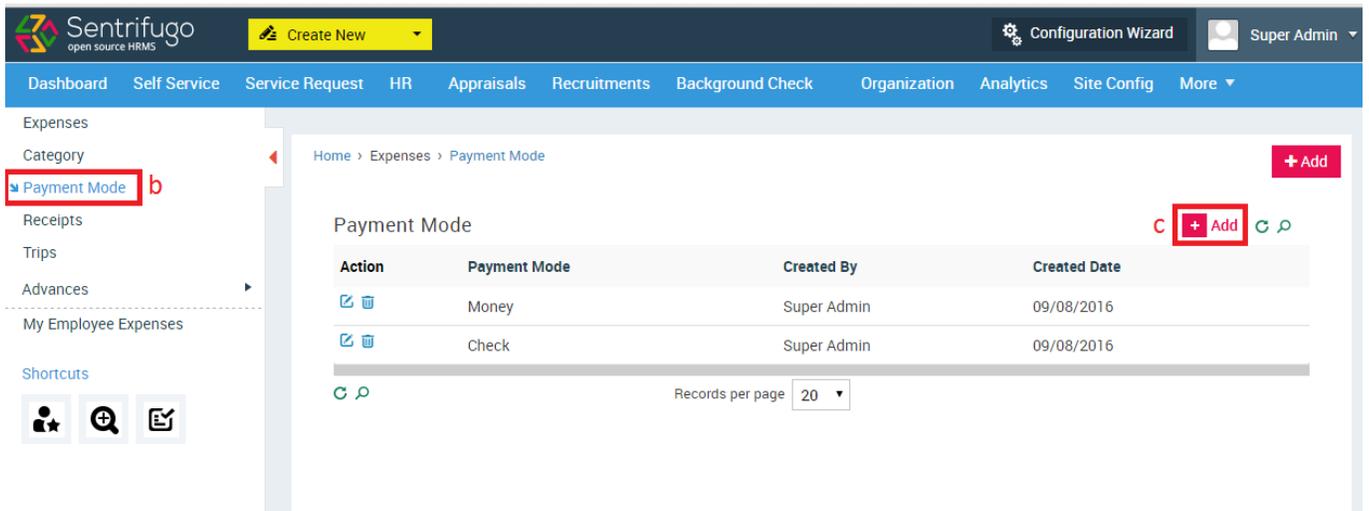


Figure 161

- b. Click **Payment Mode** on the left menu panel
- c. Click **+Add** button on the right side

Or

Please refer Figure 162

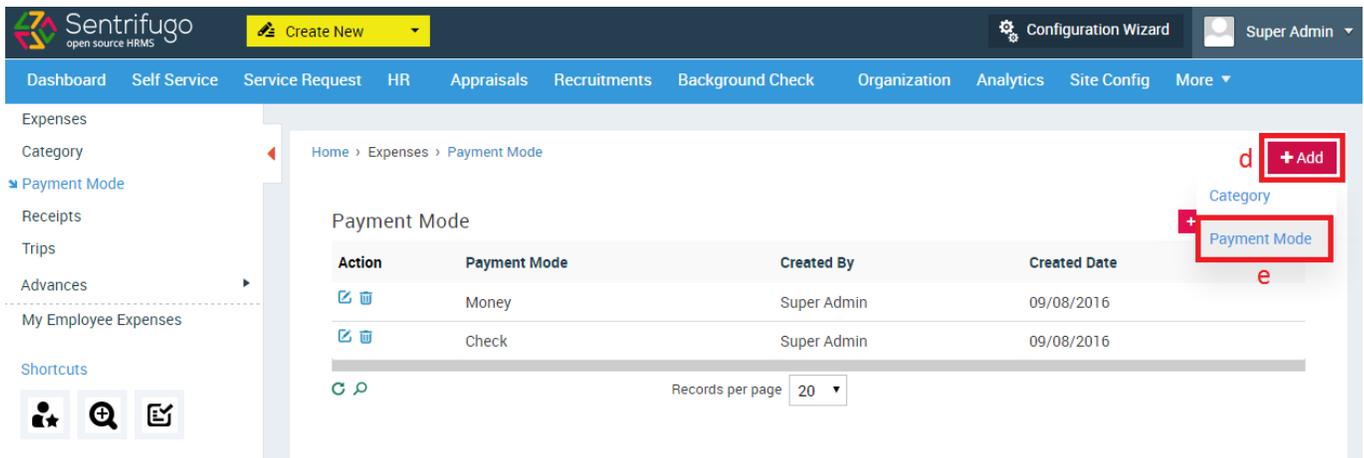


Figure 162

- d. Click **+Add** on the top right corner
- e. Select **Payment Mode**

Please refer Figure 163

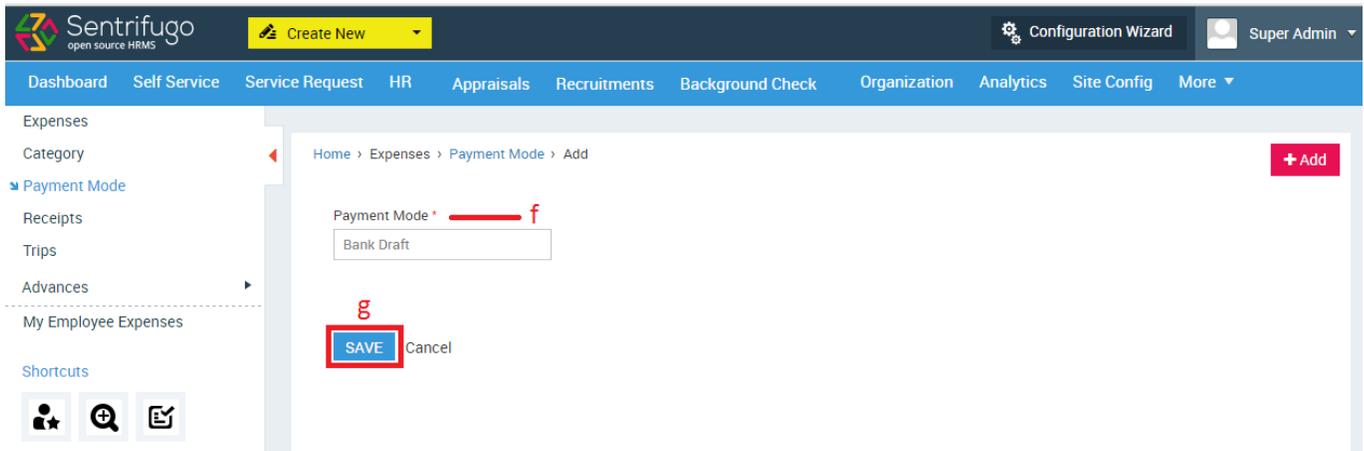


Figure 163

- f. Enter Payment Mode name
- g. Click **SAVE** button

## 14.3 How do I add an Expense?

Please refer Figure 164

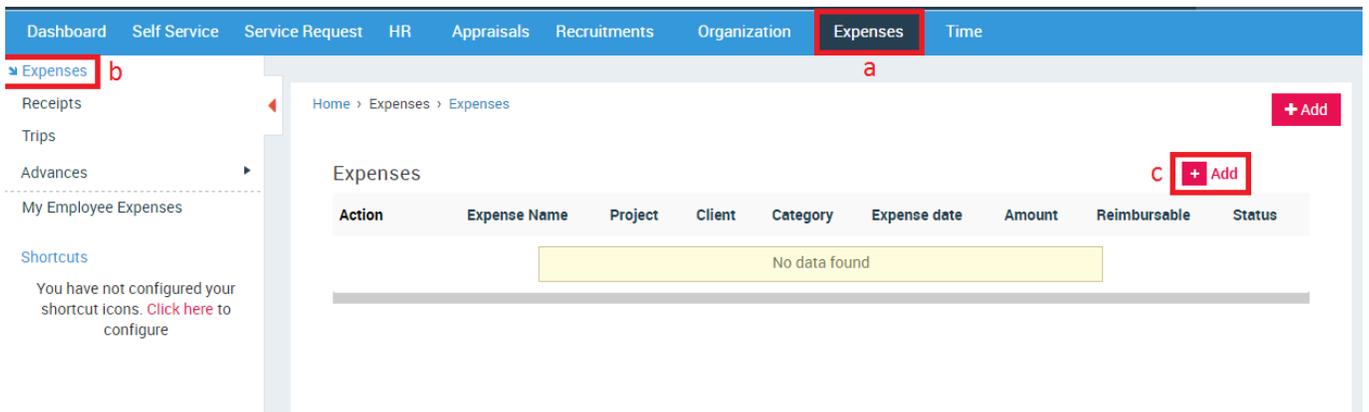


Figure 164

- a. Click **Expenses** in the top menu
- b. Click **Expenses** in the left menu panel
- c. Click **+Add** button on the right side

Please refer Figure 165

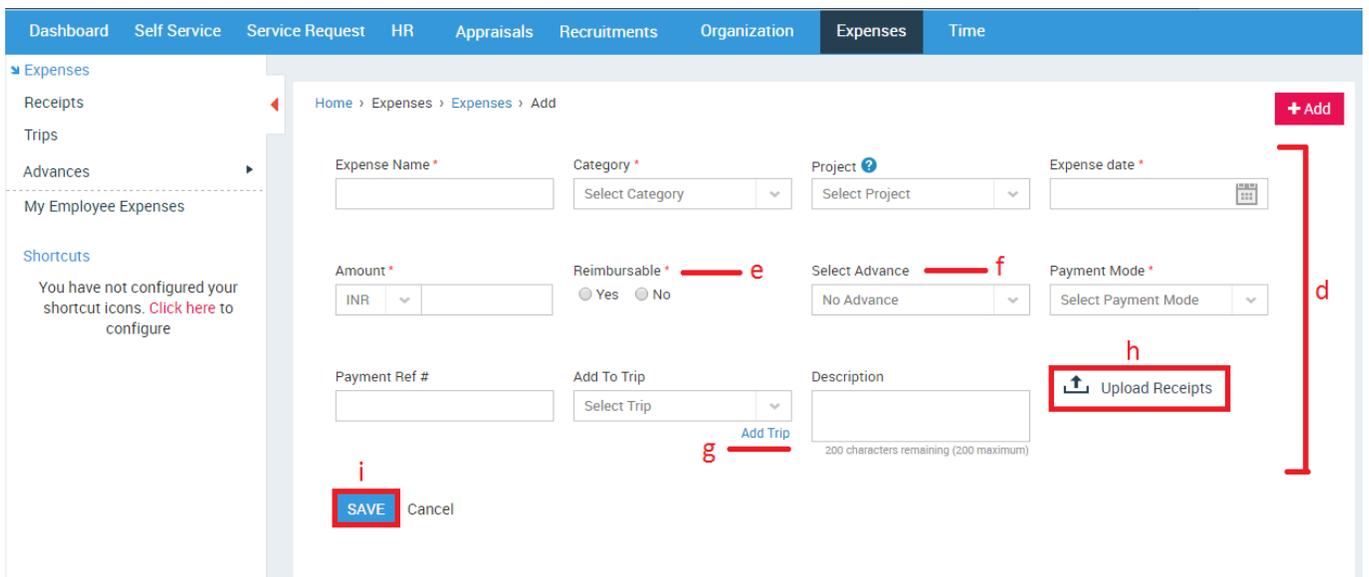


Figure 165

- d. Enter the required details
- e. Not functional in the current version
- f. Employers can pre-allocate a certain amount of money called **Advance** to an employee, which can be used for expenses incurred during trip(s) or for project(s) and client(s).
- g. Add Trips for managing multiple expenses, clients and projects. A Trip comprises of the various costs incurred in a trip like travel, food, and accommodation
- h. Upload Receipts to support your expenses

- i. Click **SAVE** button

## 14.4 How do I submit an Expense for approval?

You will need to create an Expense, before you can submit it.

Please refer Figure 166

The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. The 'Expenses' menu item is highlighted with a red box and labeled 'a'. The left sidebar has 'Expenses' selected with a red box and labeled 'b'. The main content area displays a table of expenses. The first row of the table has a 'View' icon highlighted with a red box and labeled 'c'. The table contains the following data:

Action	Expense Name	Project	Client	Category	Expense date	Amount	Reimbursable	Status
	Travel Allowance	SearchEngine	US Client	Travel	09/07/2016	2000.00	No	saved
	travel	SearchEngine	US Client	Travel	09/01/2016	5000.00	No	submitted

Figure 166

- a. Click **Expenses** in the top menu
- b. Click **Expenses** in the left panel
- c. Click **View** button in the action column

Please refer Figure 167

The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. The 'Expenses' menu item is highlighted with a red box. The left sidebar has 'Expenses' selected. The main content area displays the details of a 'Travel Allowance' expense. The amount is 'INR-2000.00' and the status is 'Saved'. The 'Submit' button is highlighted with a red box and labeled 'd'. The table below shows the details of the expense:

Expense #	Travel Allowance	Client	US Client
Project	SearchEngine	Reimbursable	No
Exchange Rate	0.00	Payment Mode	Money
Payment Ref #			
Advance	No Advance		
Description			

Figure 167

- d. Click **Submit** button

A confirmation message will be displayed.

Please refer Figure 168

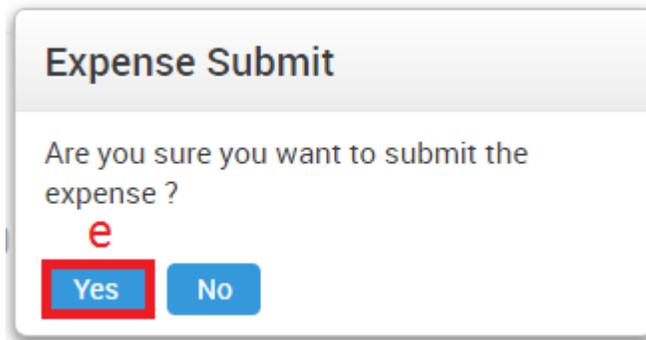


Figure 168

- e. Click **Yes**

## 14.5 How do I export an Expense?

You will need to create an Expense, before you can export it.

Please refer Figure 169

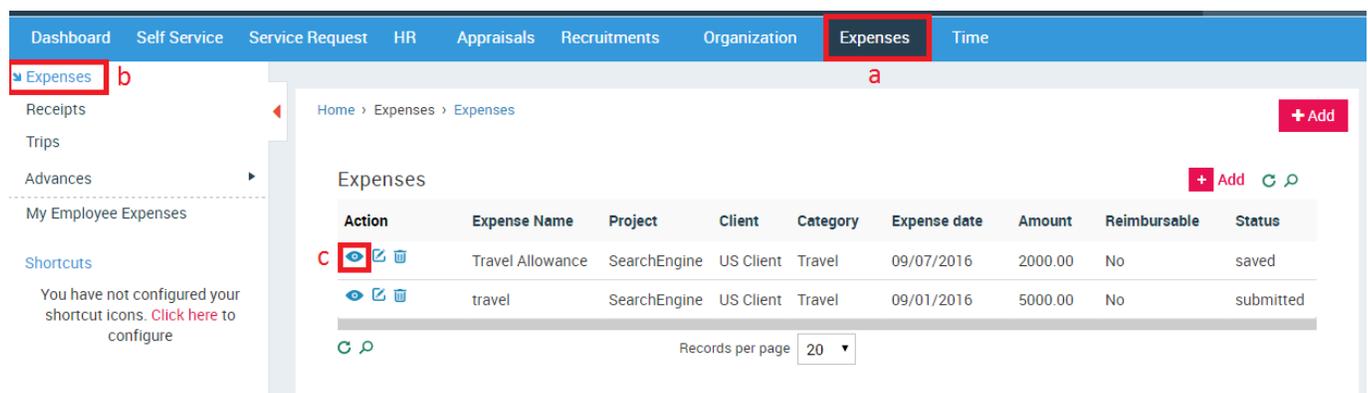


Figure 169

- a. Click **Expenses** in the top menu
- b. Click **Expenses** in the left panel
- c. Click **View** button in the action column

Please refer Figure 170

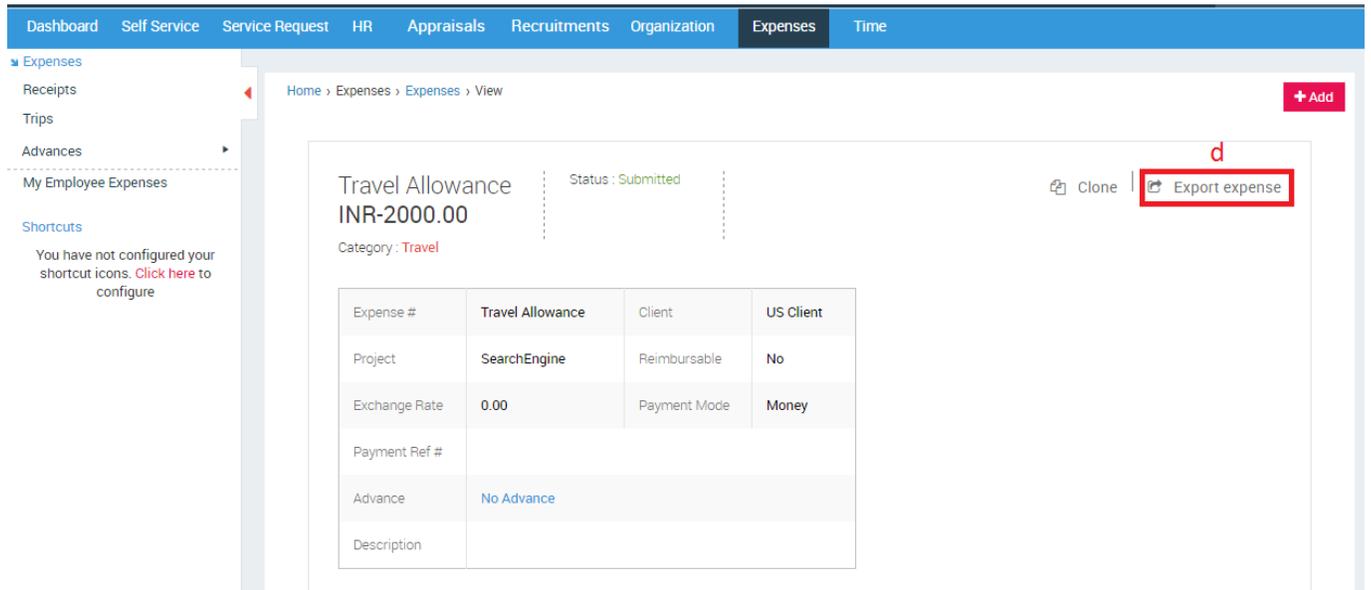


Figure 170

- d. Click Export expense button

An expense report in PDF format will be downloaded.

## 14.6 How do I clone an Expense?

You can clone an expense if a new expense has similar details to the one you want to clone. It will save you the trouble from creating a new expense from scratch.

You will need to create an Expense, before you can clone it.

Please refer Figure 171

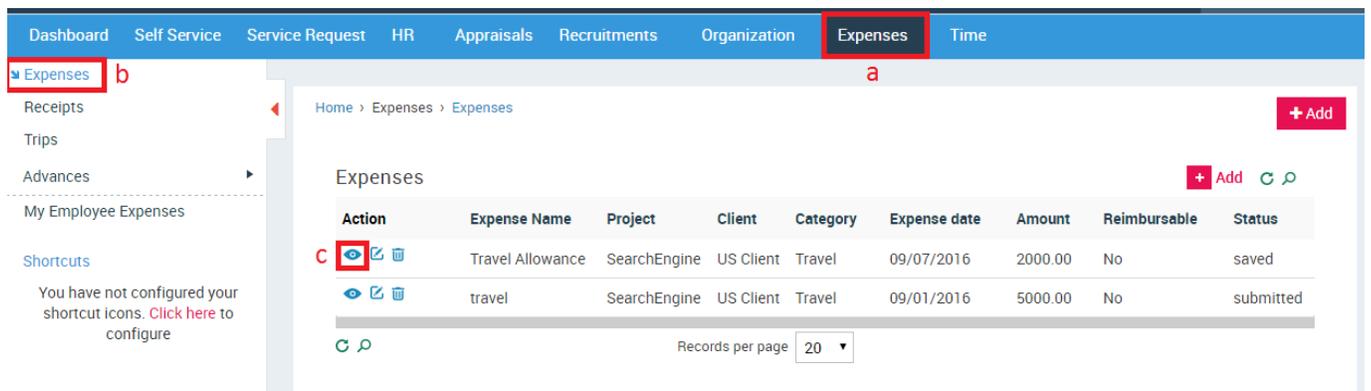


Figure 171

- a. Click **Expenses** in the top menu
- b. Click **Expenses** on the left menu panel
- c. Click **View** button in the action column

Please refer Figure 172

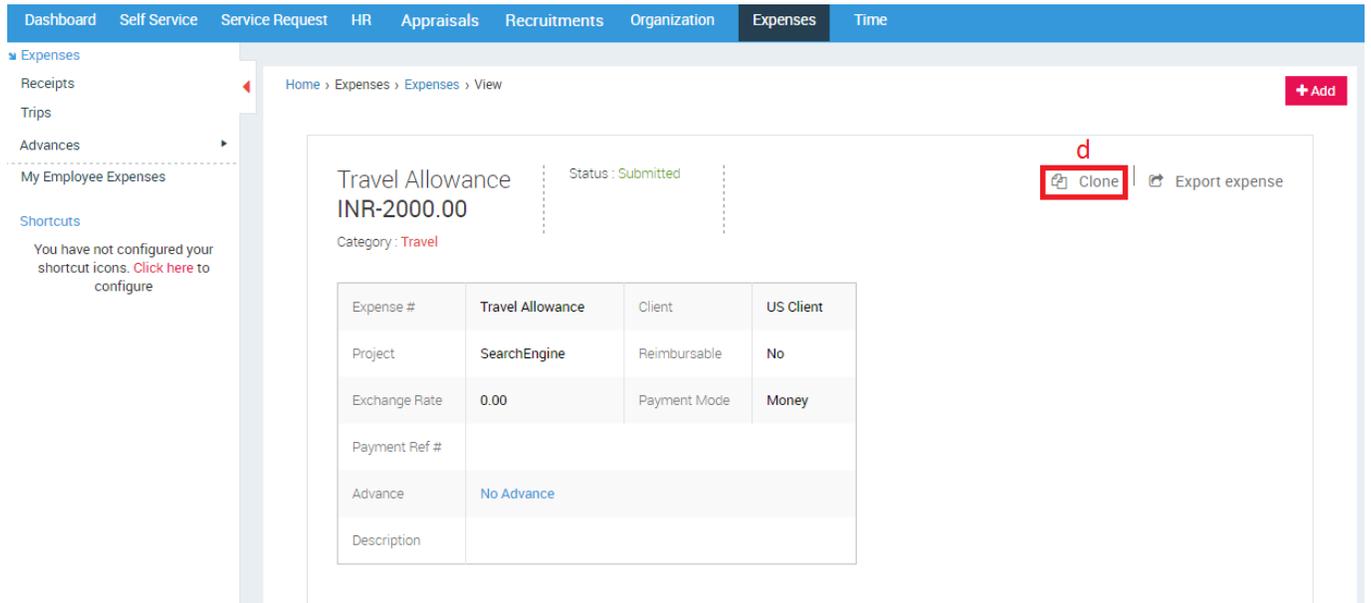


Figure 172

d. Click **Clone** option

You will be redirected to the Add Expense screen. The details will be auto filled by default, you can edit the details.

Please refer Figure 173

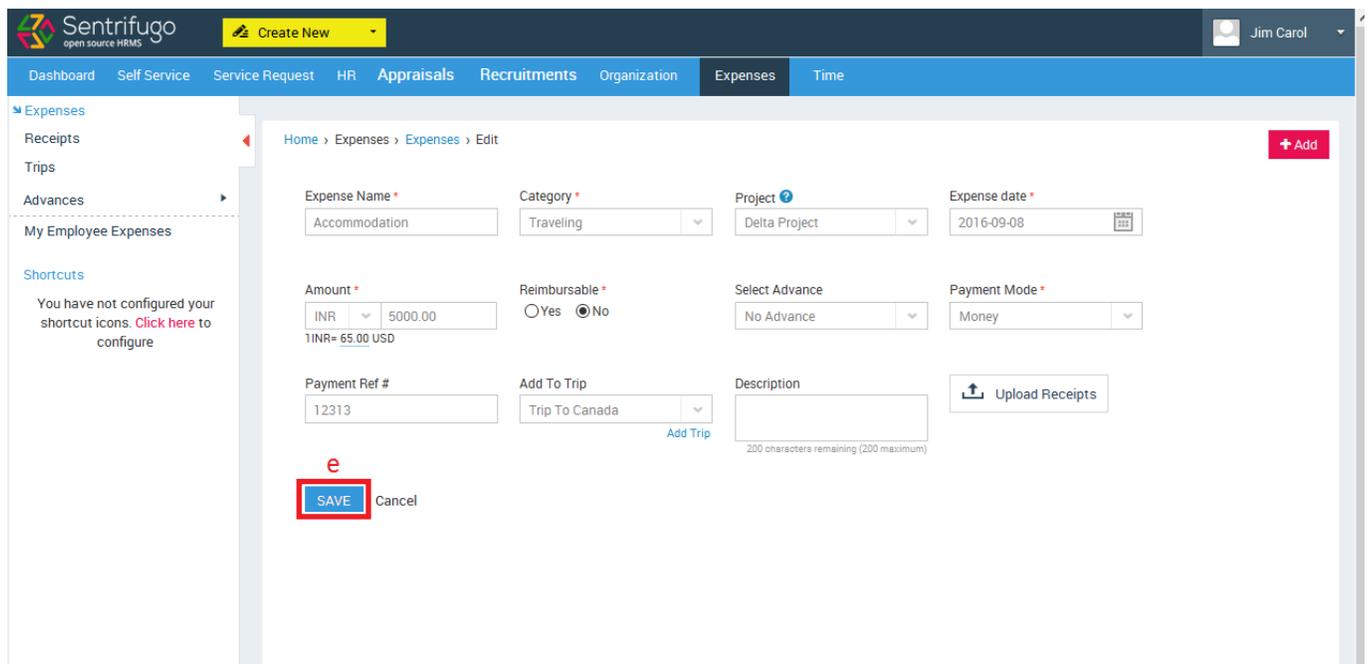


Figure 173

- e. Click **SAVE** button

## 14.7 How do I approve/reject Employee Expenses?

Please refer Figure 174

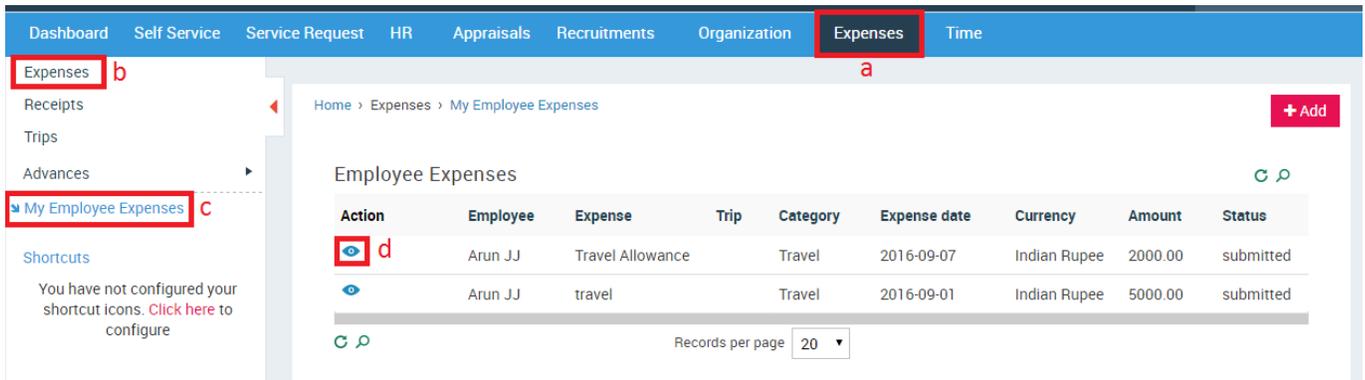


Figure 174

- a. Click **Expenses** in the top menu
- b. Click **Expenses** in the left menu panel
- c. Click **My Employee Expenses** in the submenu
- d. Click **View** icon in the action column

Please refer Figure 175

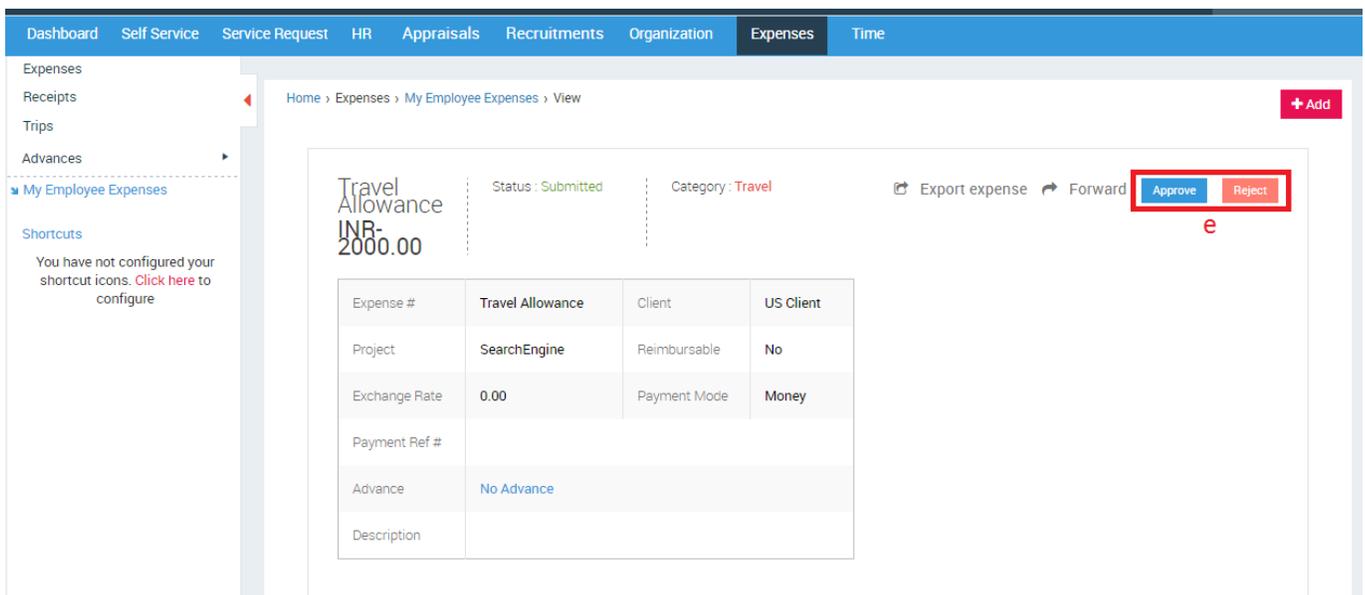


Figure 175

- e. Click **Approve/Reject**

A confirmation message will be displayed.

Please refer Figure 176

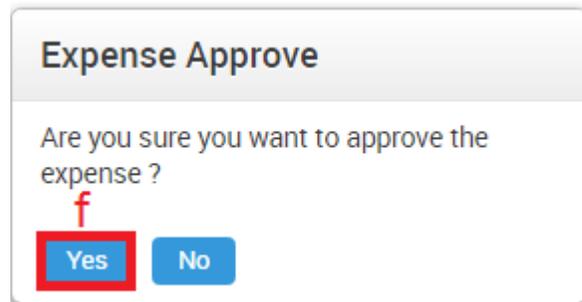


Figure 176

- f. Click **Yes** Button

## 14.8 How do I forward an Expense to another Manager?

Please refer Figure 177

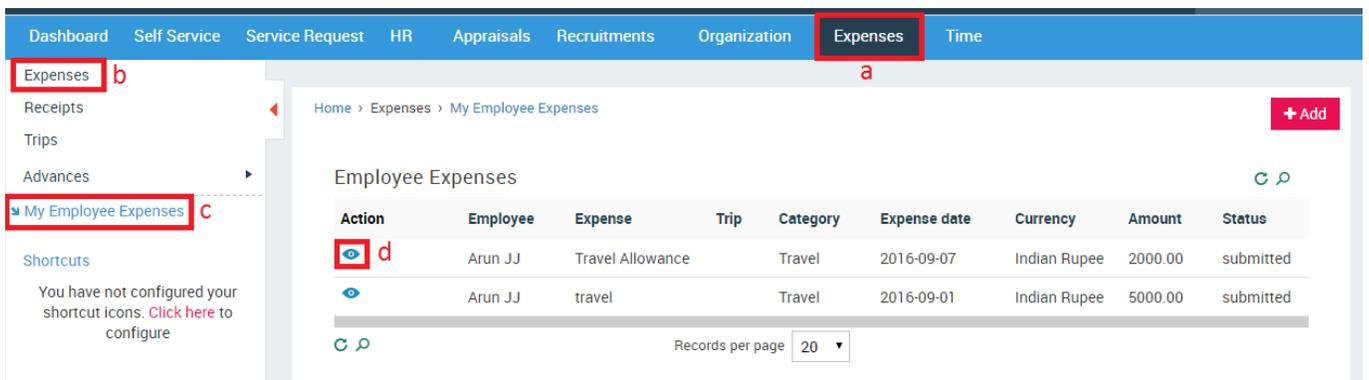
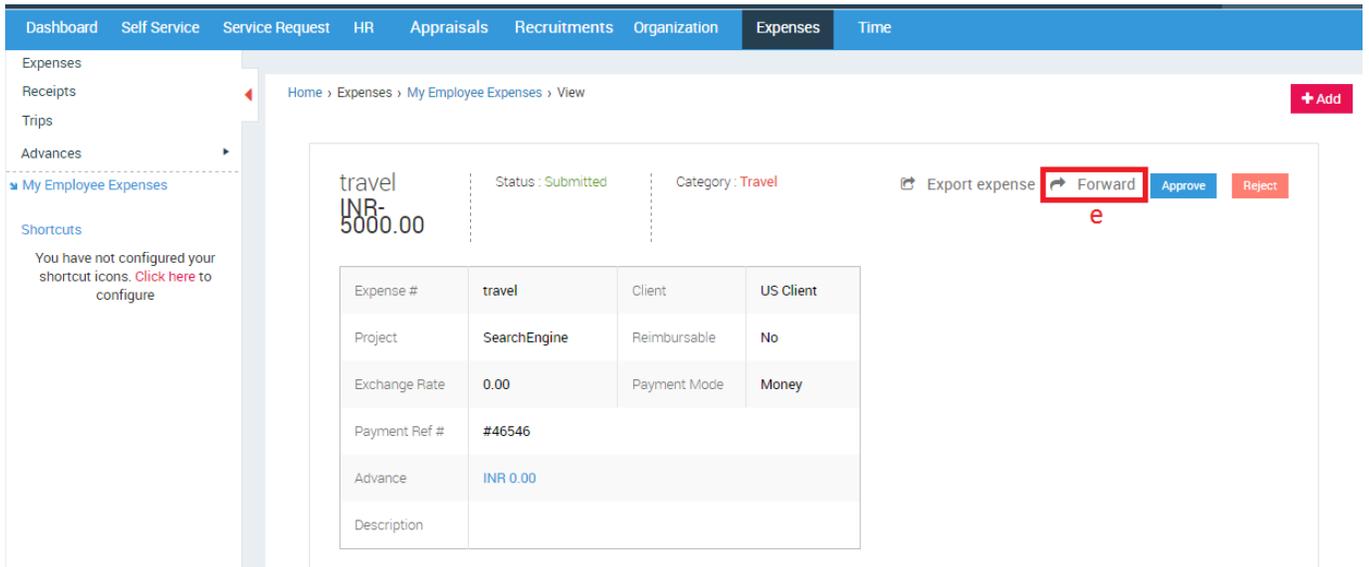


Figure 177

- a. Click **Expenses** in the top menu
- b. Click **Expenses** on the left menu panel
- c. Click **My Employee Expenses** in the submenu
- d. Click **View** button in the action column

Please refer Figure 178



Home > Expenses > My Employee Expenses > View + Add

travel  
INR-5000.00

Status: Submitted    Category: Travel    Export expense    **Forward**    Approve    Reject

e

Expense #	travel	Client	US Client
Project	SearchEngine	Reimbursable	No
Exchange Rate	0.00	Payment Mode	Money
Payment Ref #	#46546		
Advance	INR 0.00		
Description			

Figure 178

e. Click **Forward** option

A small pop up window will open

Please refer Figure 178

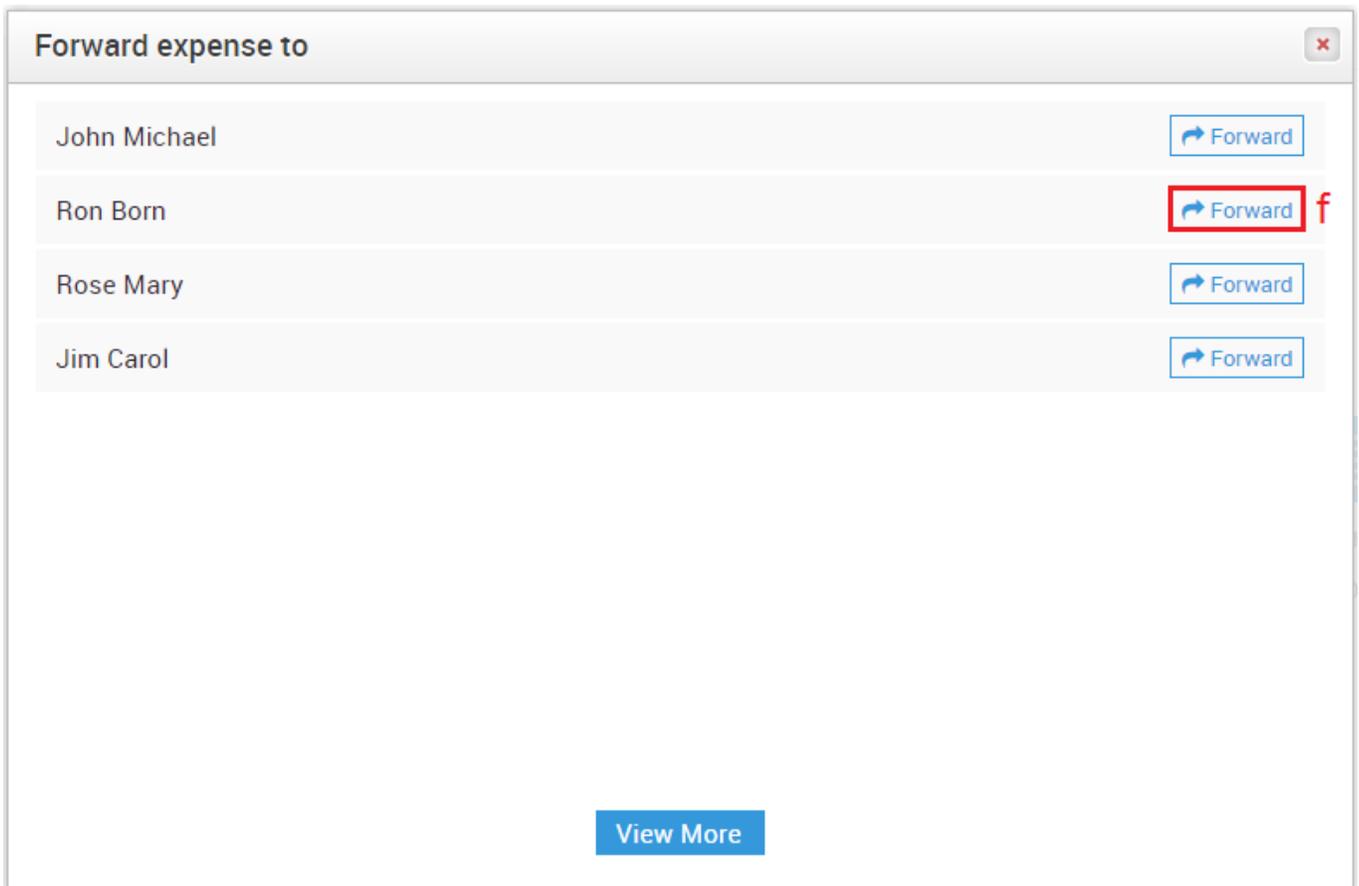


Figure 178

- f. Click **Forward** button against the Manager's name to whom you want to forward the expense to

The other manager will receive an email notification informing him about the forwarded expense. He/she can Approve/Reject/Forward the expense.

## 14.9 How do I upload Receipts?

Please refer Figure 179

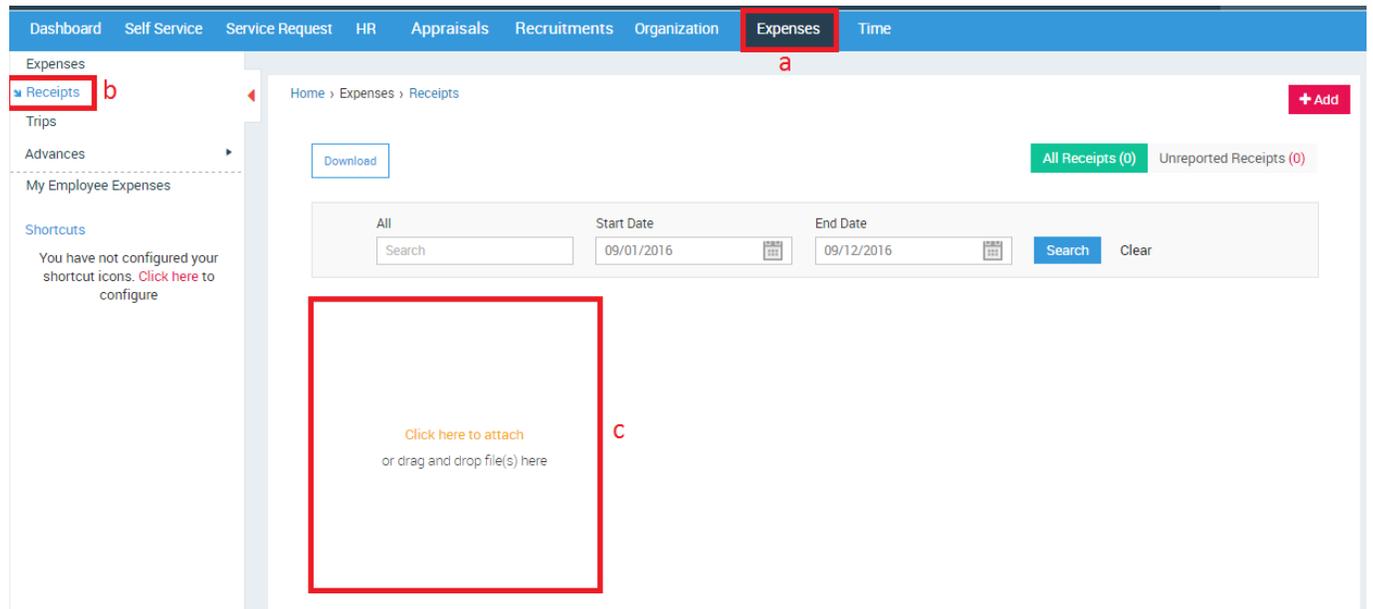


Figure 179

- a. Click **Expenses** in the top menu
- b. Click **Receipts** on the left menu panel
- c. Click here to upload receipts **Or** Drag and drop files here

## 14.10 How do I download my Receipts?

Please refer Figure 180

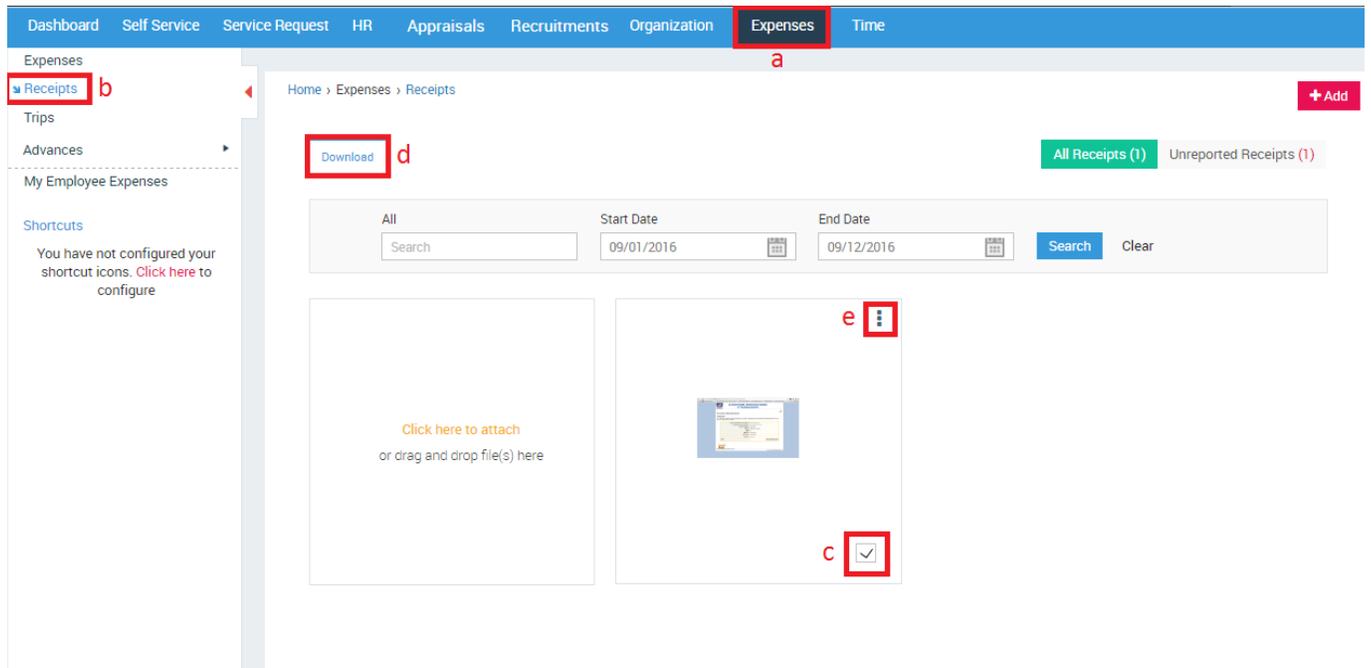


Figure 180

- a. Click **Expenses** in the top menu
- b. Click **Receipts** on the left menu panel
- c. Select the receipt you want to download
- d. Click **Download** button

Or

- e. Click **More Action** icon

Please refer Figure 181

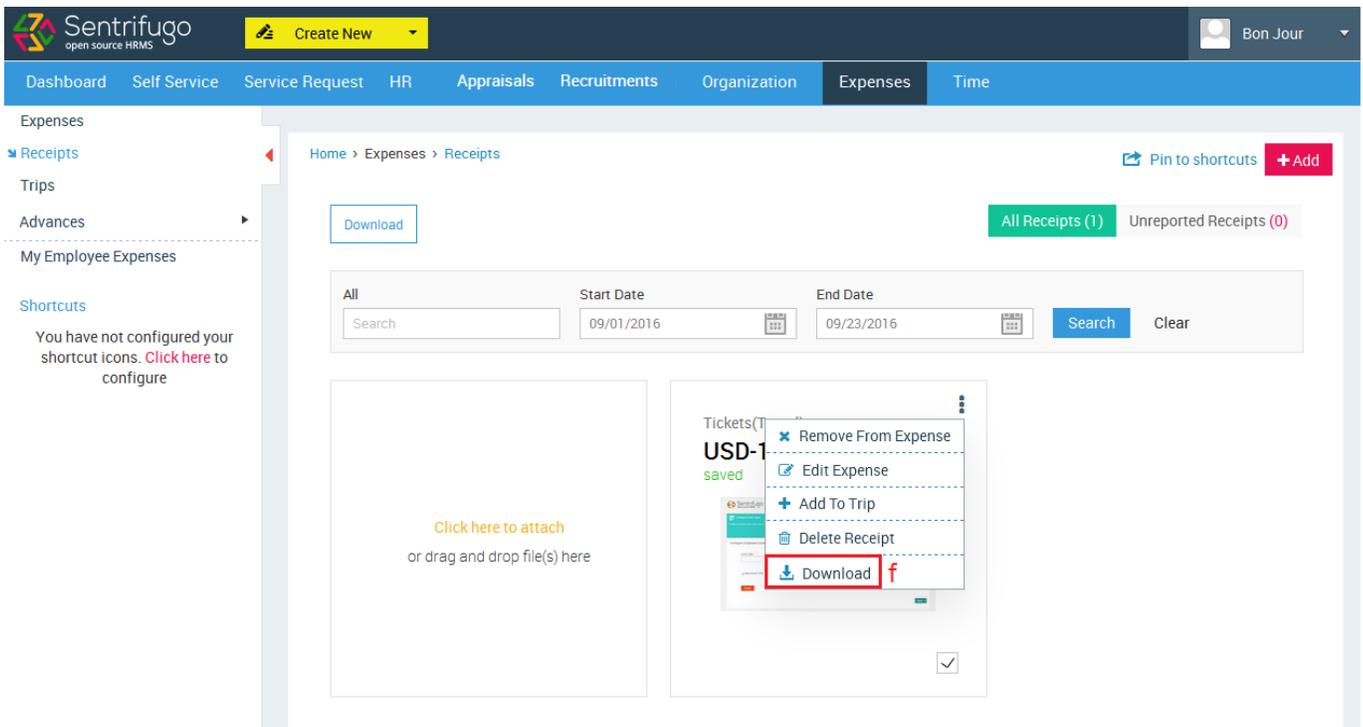


Figure 181

f. Select Download

## 14.11 What are Unreported Receipts?

Receipts which haven't been attached with any Expense or Trip are placed in the Unreported Receipts category.

*Please refer Figure 182*

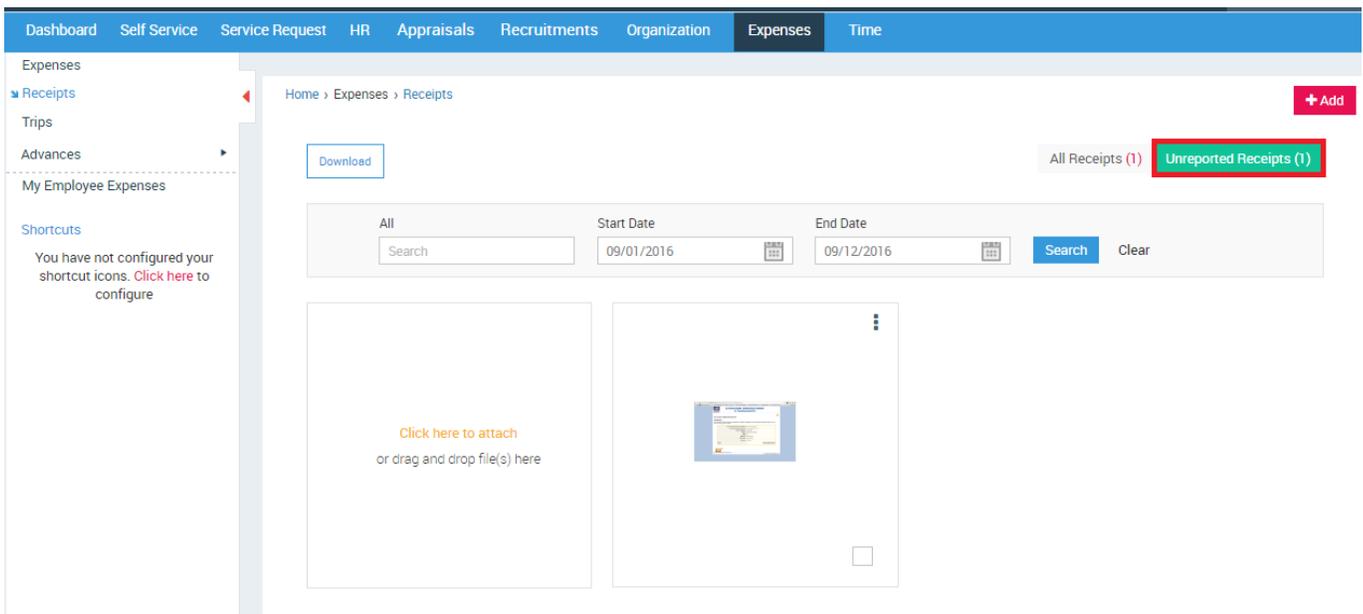


Figure 182

## 14.12 How do I add Receipts to Expenses/Trips?

To upload receipts while adding expenses, please refer [14.3 How do I add an Expense?](#)

Please refer *Figure 183*

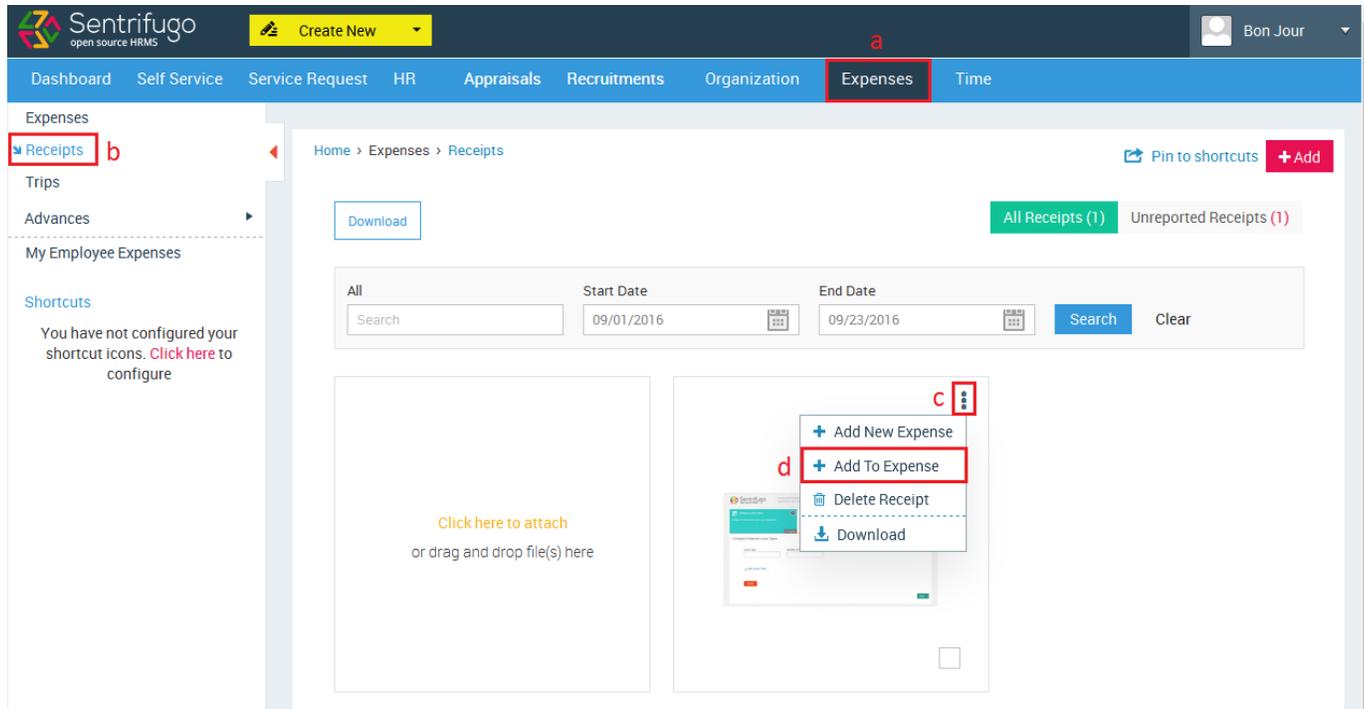


Figure 183

- a. Click **Expenses** in the top menu
- b. Click **Receipts** on the left menu panel
- c. Click **More Actions** icon
- d. Click **Add to Expense**

A small pop up window will open.

Please refer *Figure 184*

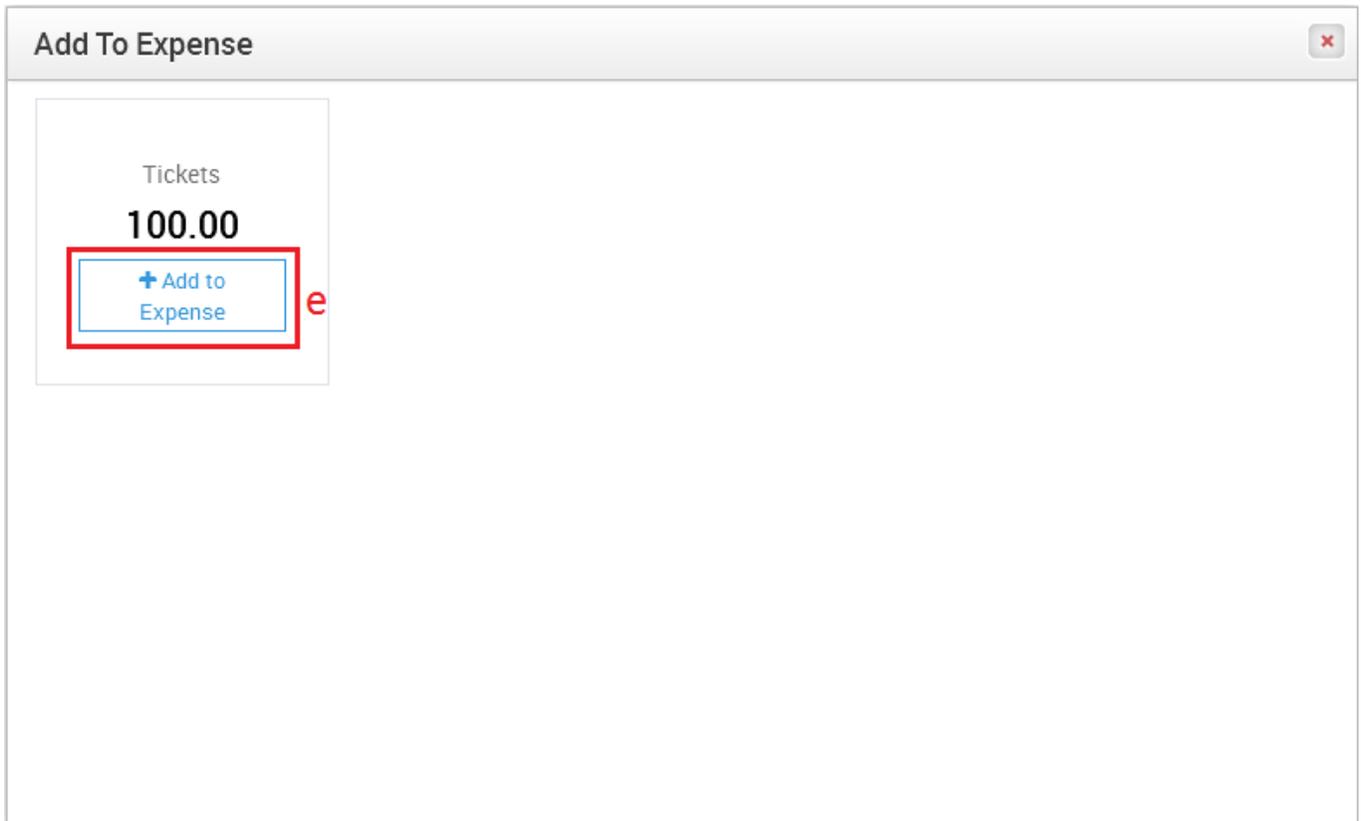
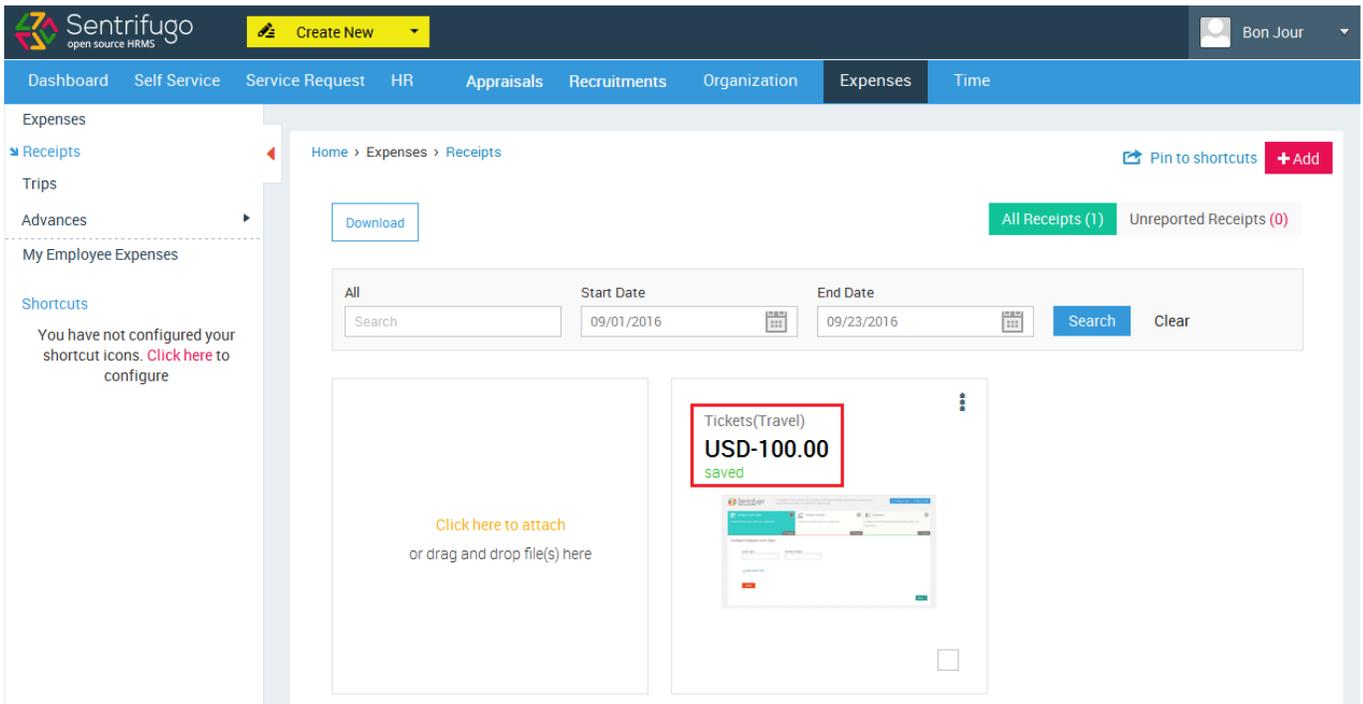


Figure 184

e. Click Add to Expense.

The below image shows the receipt has been added to an expense:





If you need to add a new expense after adding a receipt, then you can add expenses from Expenses > Receipts > Click on More Actions Button > Add New Expense.

## 14.13 How do I delete a Receipt?

Please refer Figure 185

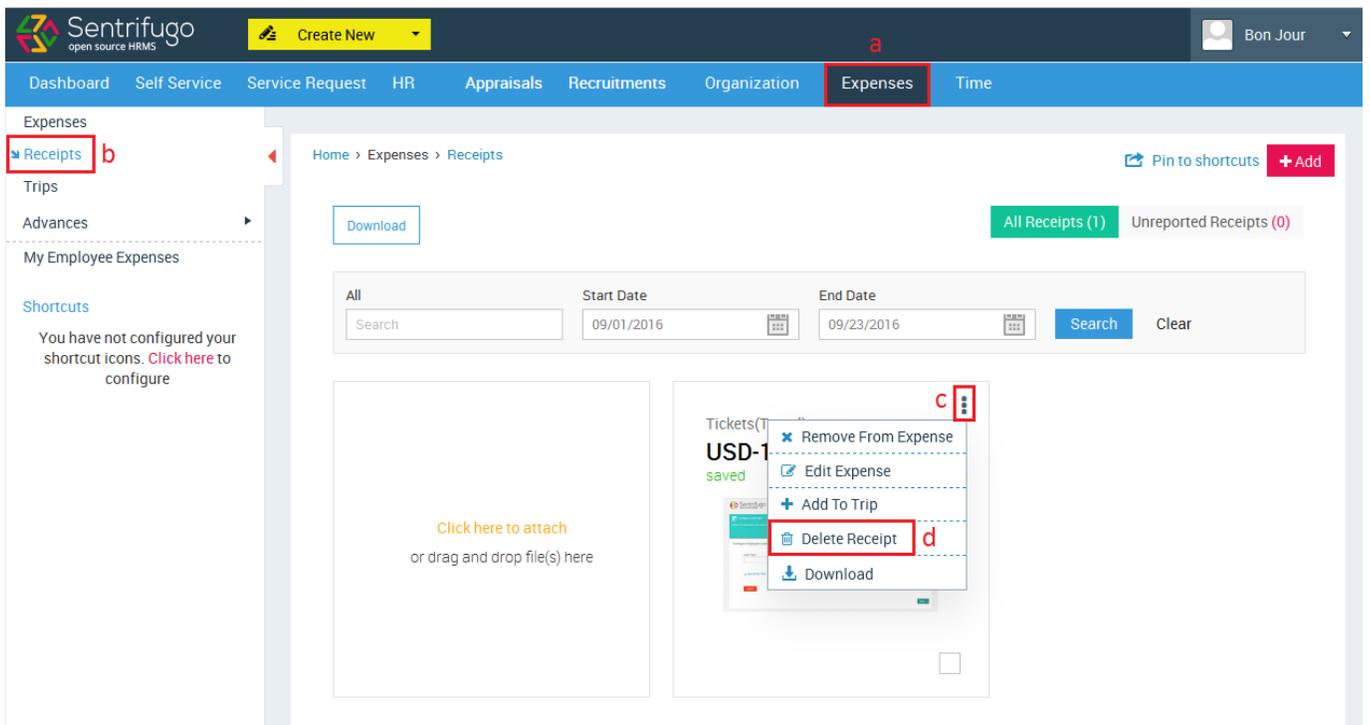


Figure 185

- a. Click **Expenses** in the top menu
- b. Click **Receipts** on the left menu panel
- c. Click More Actions icon
- d. Click Delete Receipt

A confirmation message will be displayed.

Please refer Figure 186

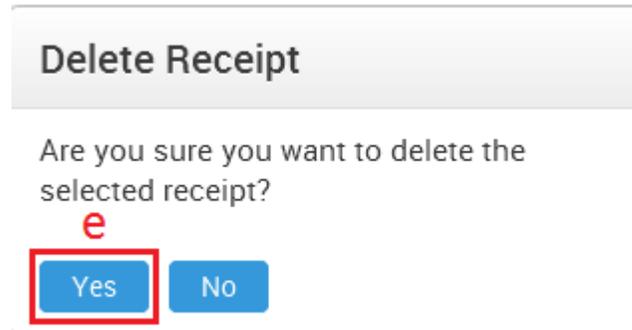


Figure 186

- e. Click **YES** Button

## 14.14 How do I create a Trip?

Add Trips for managing multiple expenses, clients and projects. A Trip comprises of the various costs incurred in a trip like travel, food, and accommodation. This helps the managers to get an overview of the employee's entire trip expense at one go.

Please refer Figure 187

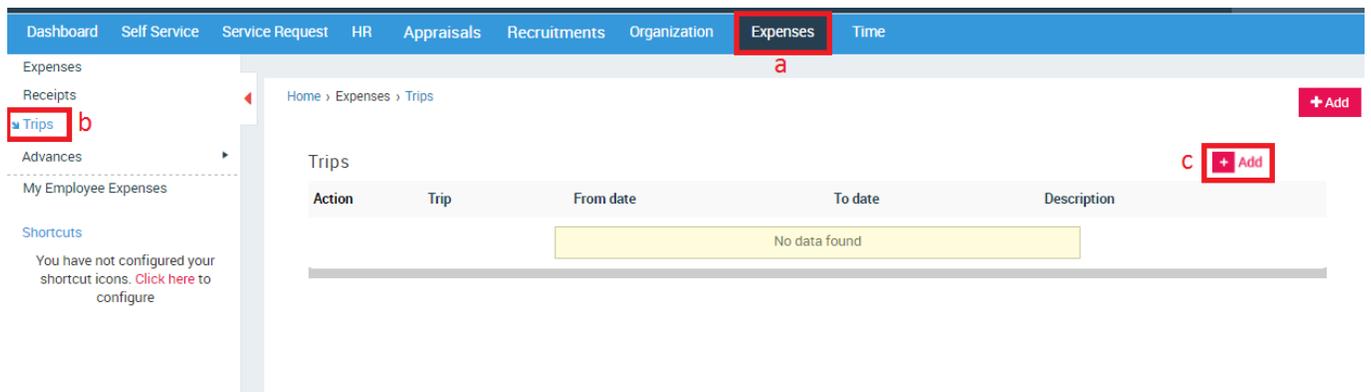


Figure 187

- a. Click **Expenses** in the top menu
- b. Click **Trips** on the left menu panel
- c. Click **+Add** Button

Please refer Figure 188

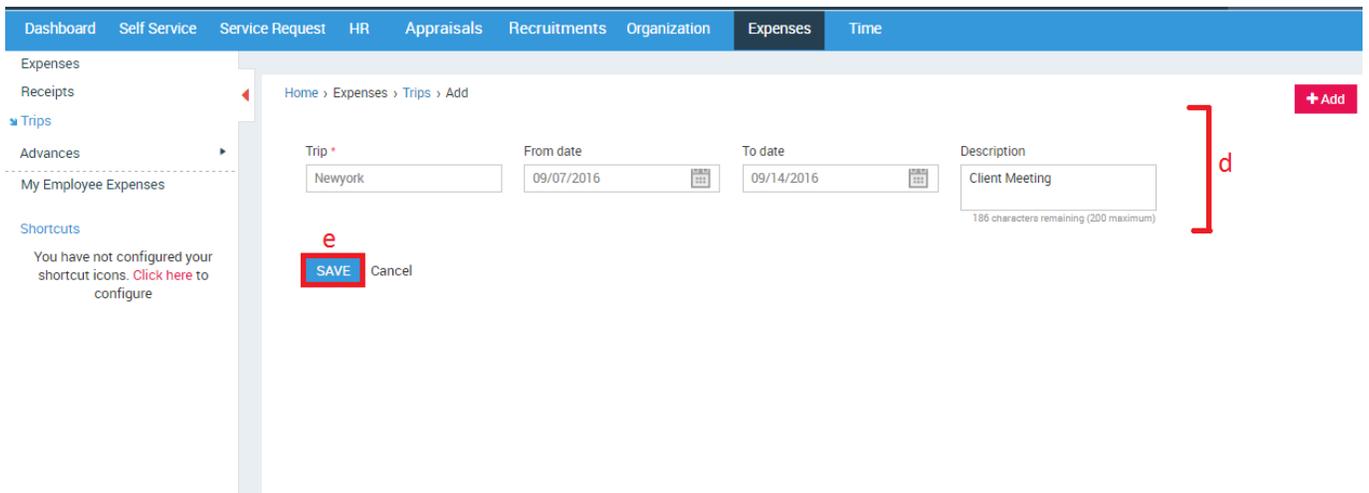


Figure 188

- d. Enter the required details
- e. Click **SAVE** button

## 14.15 How do I allot an Advance to an Employee?

Sentrifugo allows Manager to pre-allocate a certain amount of money called **Advance** to an employee, which can be used for expenses incurred during trip(s) or for project(s) and client(s).

*Please refer Figure 189*

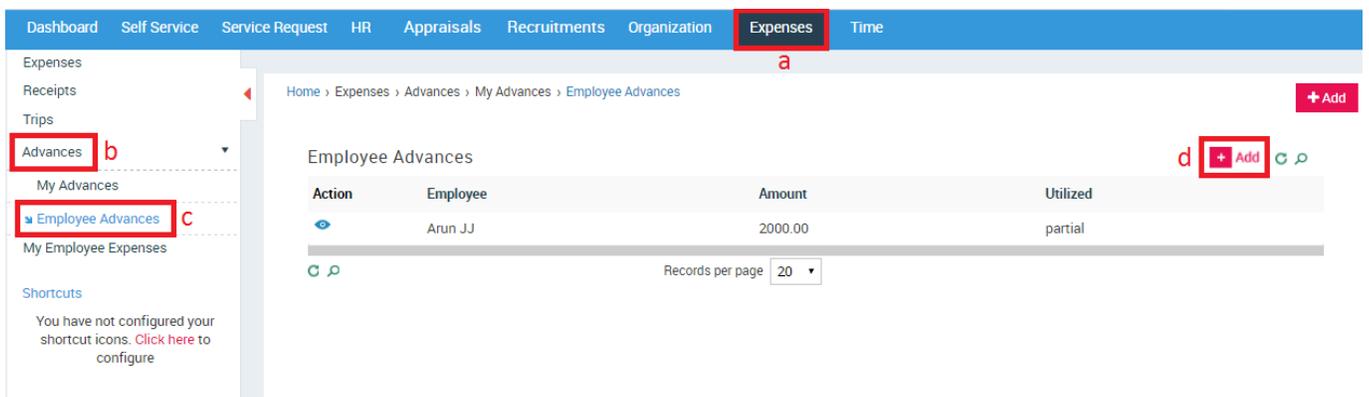


Figure 189

- a. Click **Expenses** in the top menu
- b. Click **Advances** on the left menu panel
- c. Click **Employee Advances** in the submenu
- d. Click **+Add** Button

Please refer Figure 190

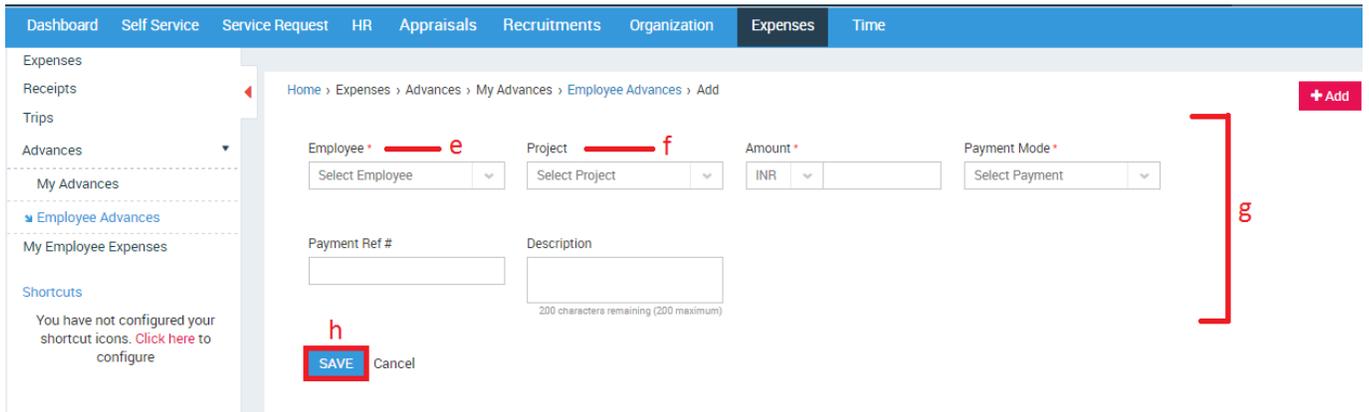


Figure 190

- e. Employees reporting to you will be populated in the drop down option
- f. The Employee's projects will be populated here
- g. Enter the required details
- h. Click **SAVE** button

## 14.16 How do I view the Advance allotted to me?

Please refer Figure 191

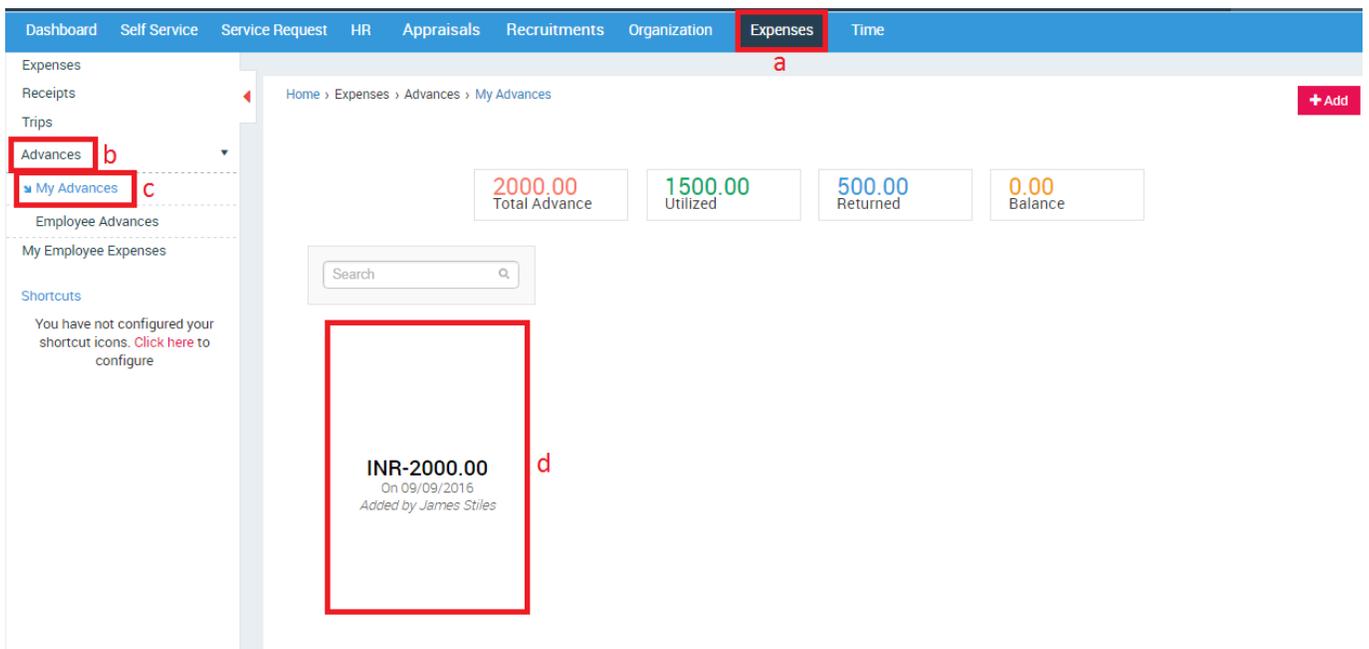


Figure 191

- a. Click **Expenses** in the top menu
- b. Click **Advances** on the left panel

- c. Click **My Advances** in the submenu
- d. You can view the advance amount and the person's name who has allotted you the advance

Please refer Figure 192

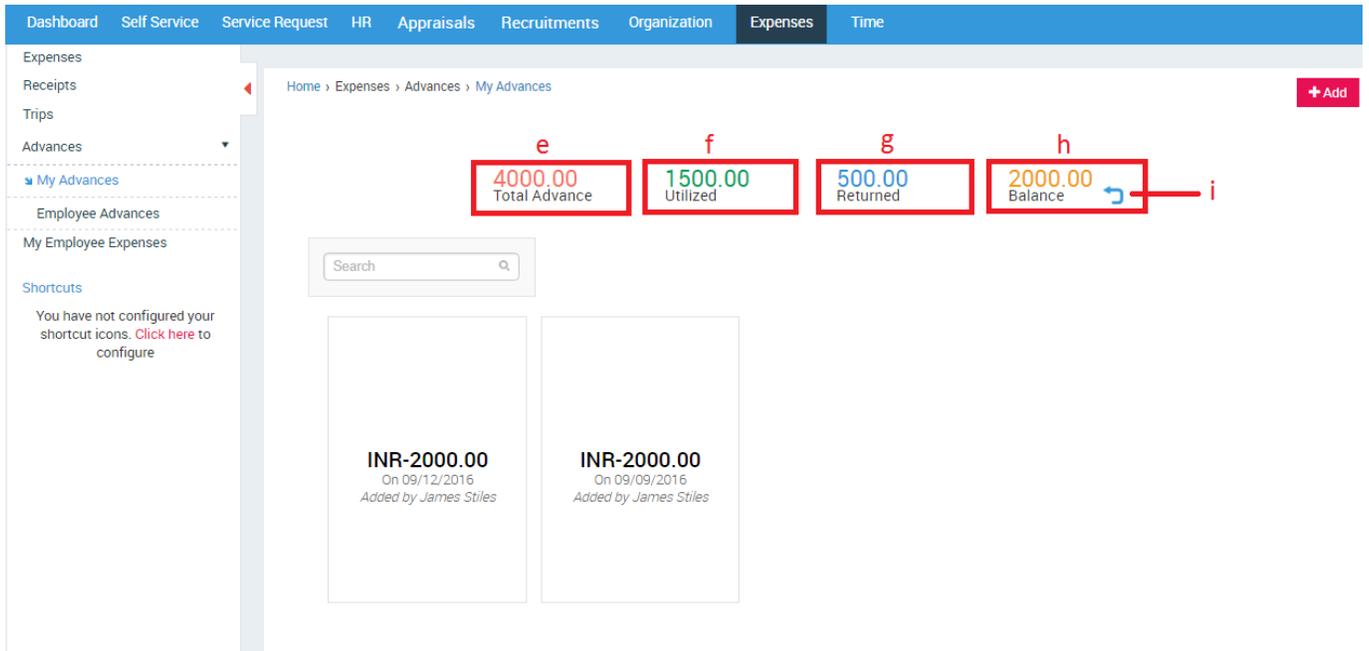
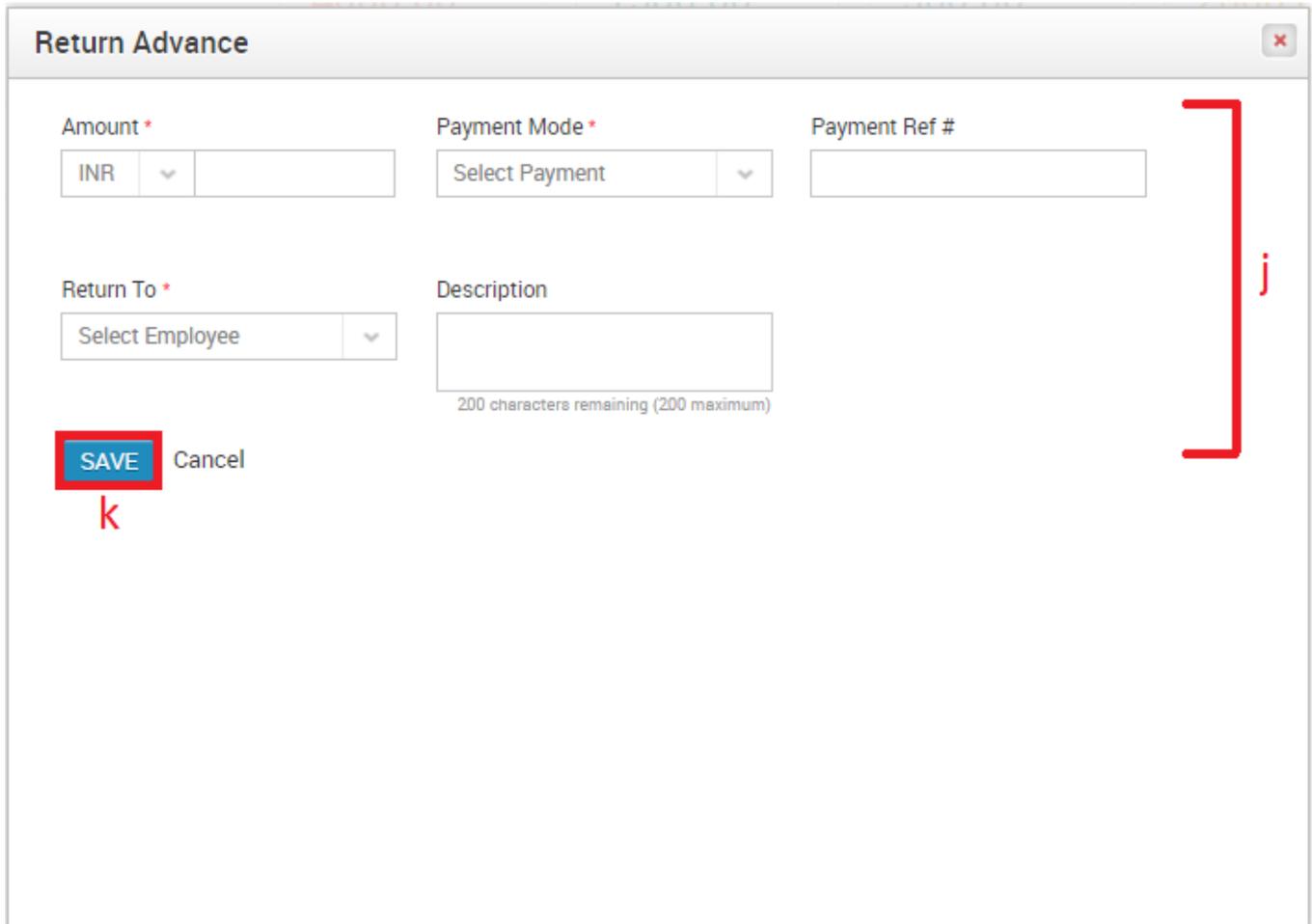


Figure 192

- e. Advance amount allotted to you
- f. Advance amount utilized by you
- g. Advance amount returned by you
- h. Balance Advance amount
- i. Click here to return Advance amount

A small pop up window will open.

Please refer Figure 193



**Return Advance**

Amount \*      Payment Mode \*      Payment Ref #

INR      Select Payment

Return To \*      Description

Select Employee      200 characters remaining (200 maximum)

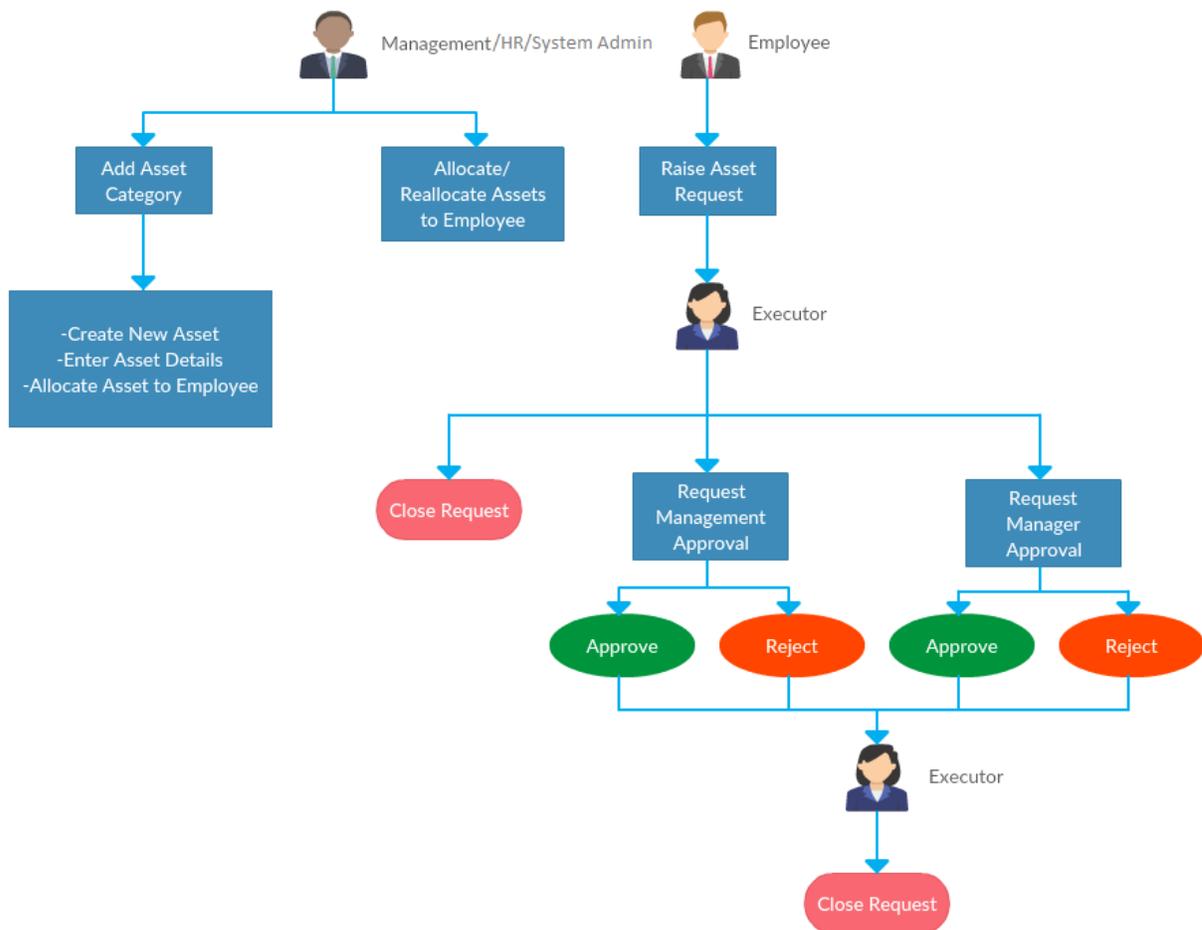
**SAVE** Cancel

Figure 193

- j. Enter the required details
- k. Click **SAVE** button

## 15. Assets

Keep a track of your organization's assets like computers, laptops, phones etc. and assign them to employees. It enables the Employers to have quick access to information related to all the assets in the organization. A user can create asset categories and subcategories. Asset details such as invoice number, vendor details, warranty status, asset images etc. can be added and then assigned to employees.



### Process Description:

- User (Management/HR/System Admin) can add a new Asset Category
- User then creates a new asset by providing asset details and allocating that asset to an employee
- User can allocate/reallocating existing assets to employees
  
- A User (Any User/Employee who has a reporting manager) raises an asset request.
- The Executor(s), Viewer(s) and the User will receive an email notification.
- The Executor has 3 options:
  - He/she can execute and close the service request
  - Request for Management's approval

- Request for User's manager's approval
- The actual execution takes place offline. If the Executor has requested for either User's Reporting Manager or Management's approval, then the request can be closed once one/both of them have approved
- If the User's Reporting Manager or Management reject the request, then the executor can close the request
- The Reporting Manager or Management will receive an email notification if an approval is sought from them by the executor(s).

## 15.1 How do I create an Asset Category?

Please refer Figure 194

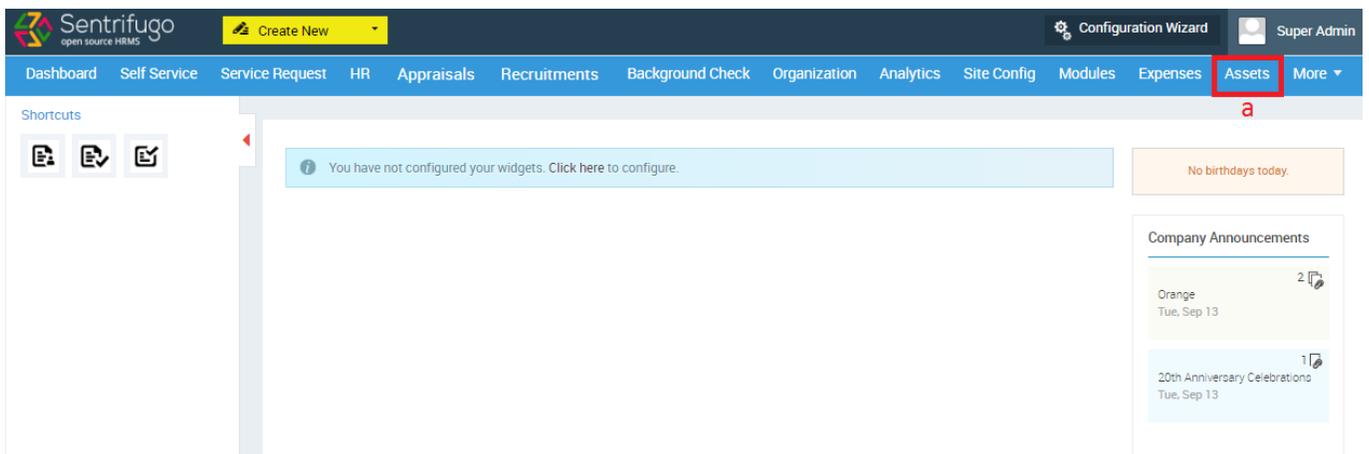


Figure 194

- a. Click **Assets** in the top menu

Please refer Figure 195

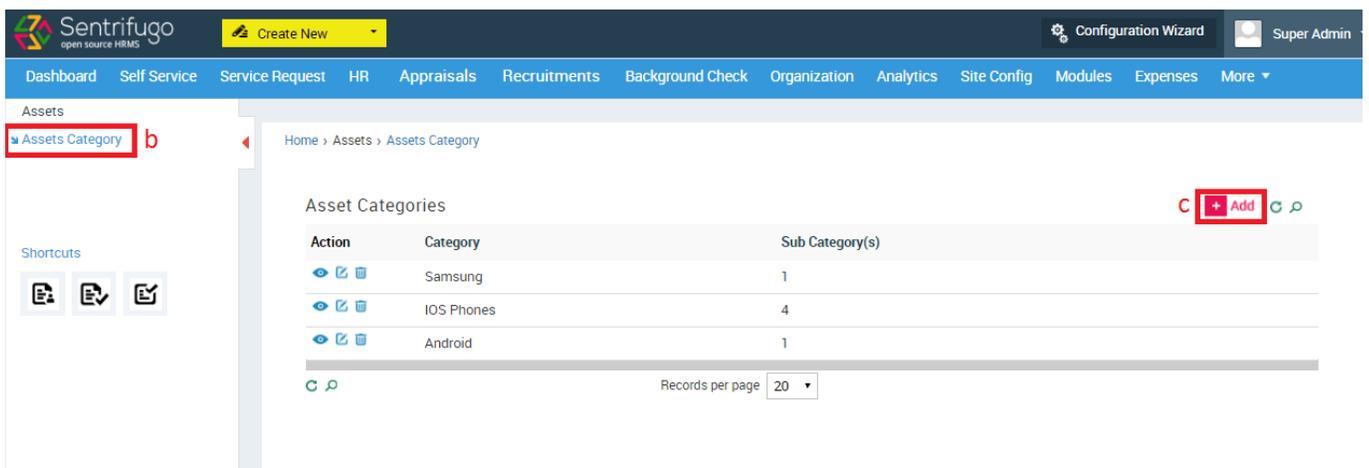


Figure 195

- b. Click **Asset Category** on the left panel
- c. Click **+Add** button

Please refer Figure 196

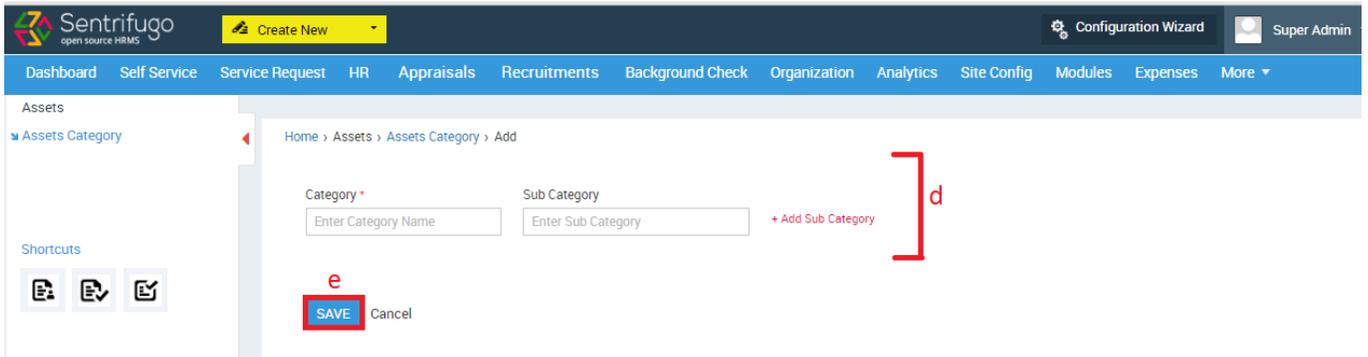


Figure 196

- d. Enter the required details
- f. Click **SAVE** button

## 15.2 How do I add an Asset?

Please refer Figure 197

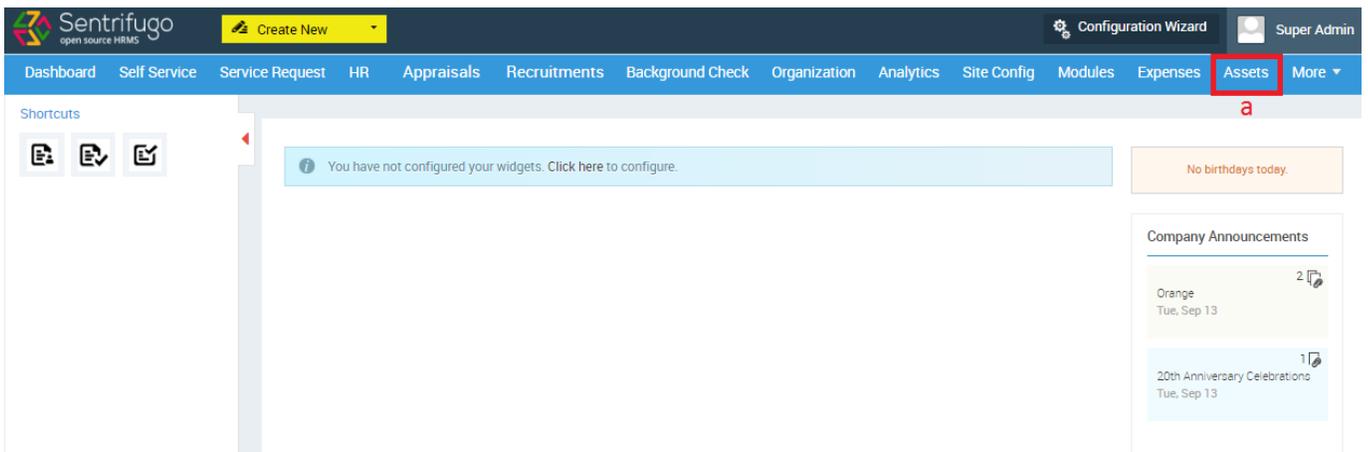


Figure 197

- a. Click **Assets** in the top menu

Please refer Figure 198

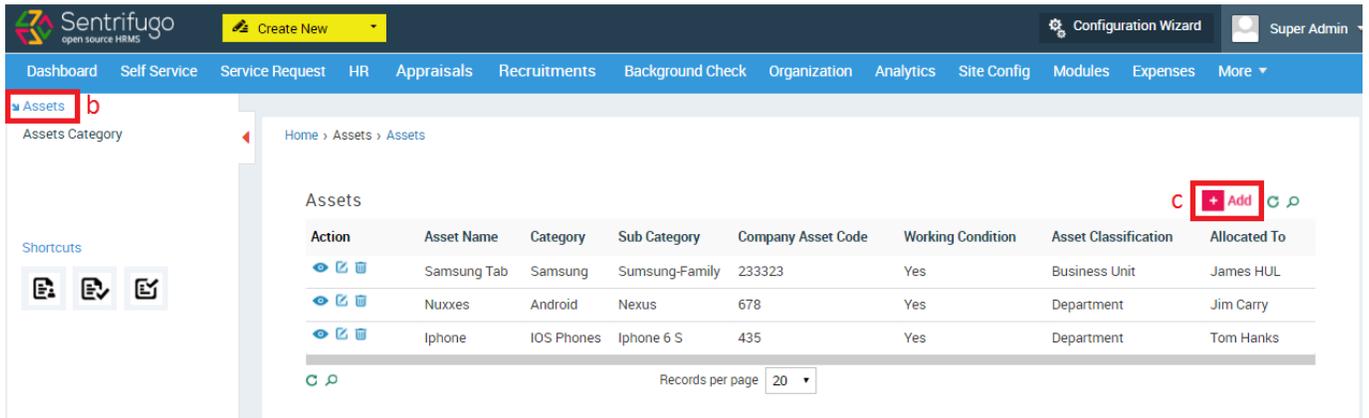


Figure 198

- b. Click **Assets** on the left panel
- c. Click **+Add** button

Please refer Figure 199

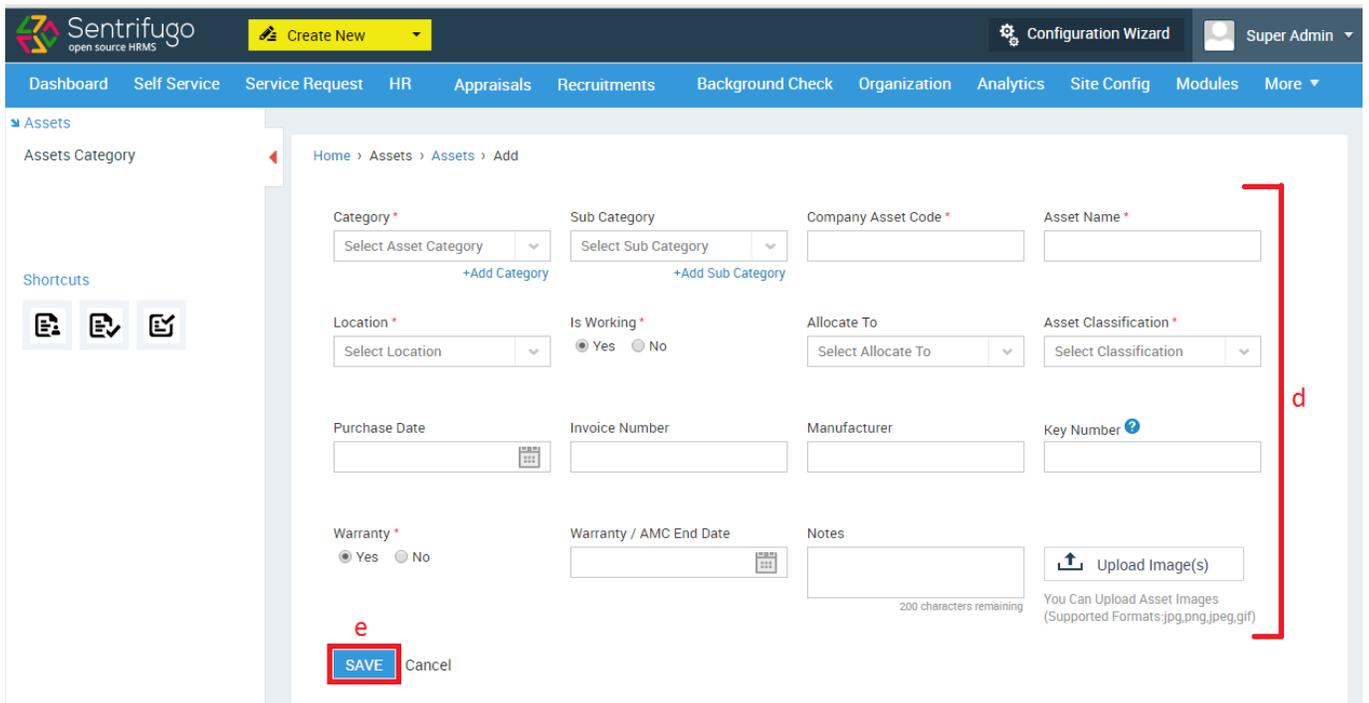
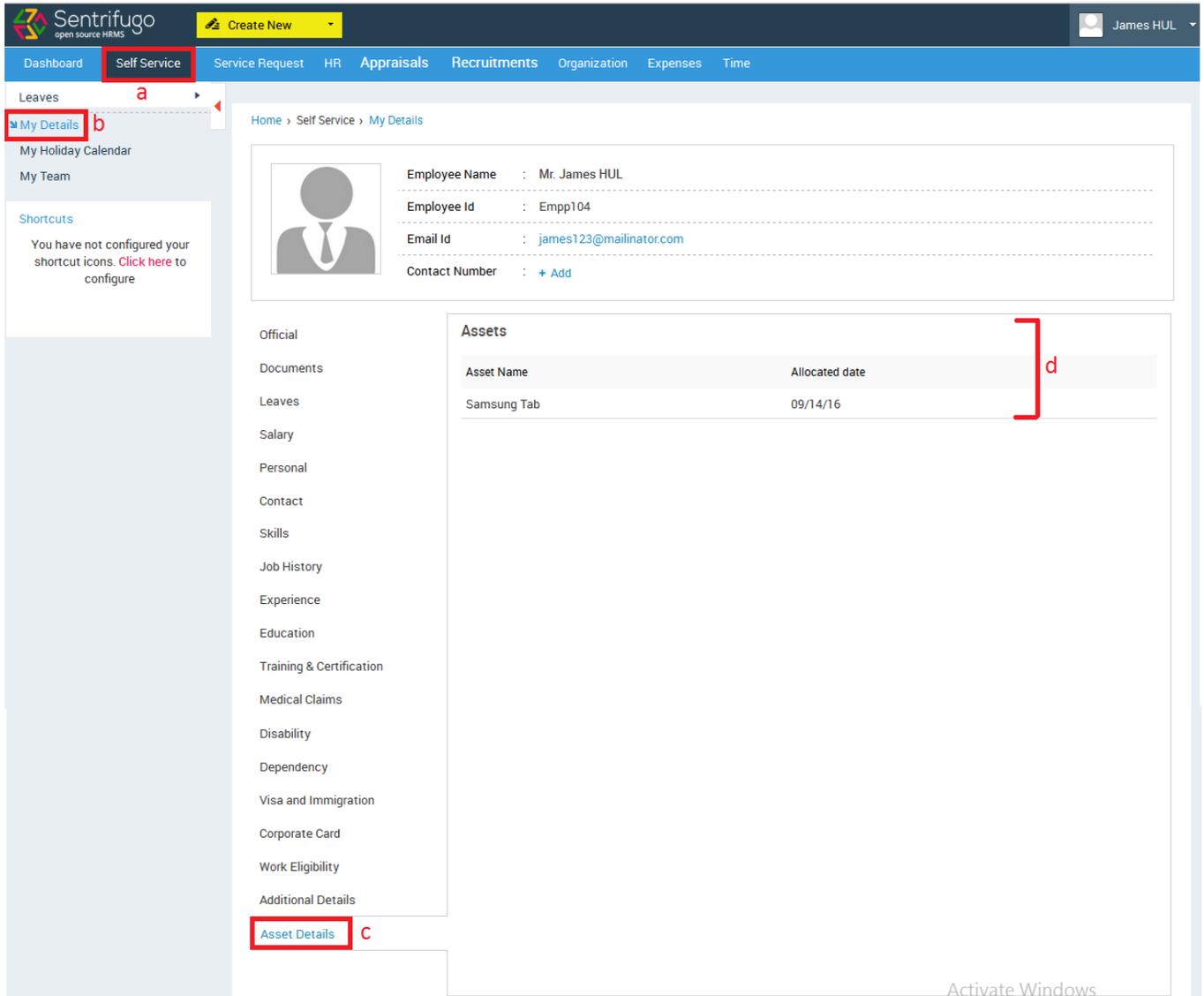


Figure 199

- d. Enter the required details
- e. Click **SAVE** button

## 15.3 How do I view my Asset(s) details?

Please refer Figure 200



Home > Self Service > My Details

Employee Name : Mr. James HUL

Employee Id : Empp104

Email Id : james123@mailinator.com

Contact Number : + Add

Asset Name	Allocated date
Samsung Tab	09/14/16

Official

Documents

Leaves

Salary

Personal

Contact

Skills

Job History

Experience

Education

Training & Certification

Medical Claims

Disability

Dependency

Visa and Immigration

Corporate Card

Work Eligibility

Additional Details

Asset Details

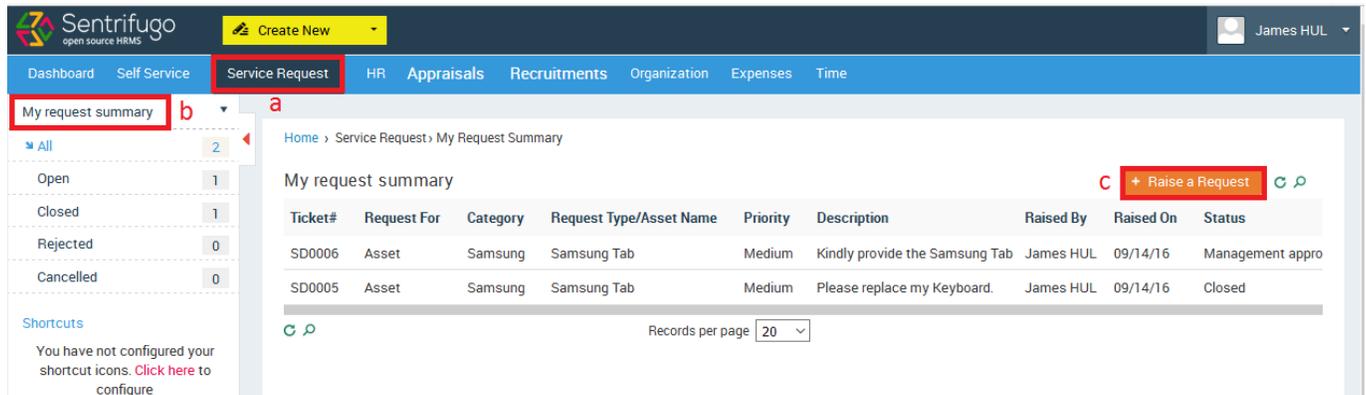
Activate Windows

Figure 200

- Click **Self Service** in the top menu
- Click **My Details** on the left menu panel
- Click **Asset Details** menu option on the form's left side
- View your details here

## 15.4 How do I raise a Service Request related to my Asset?

Please refer Figure 201



The screenshot shows the Sentrifugo interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request' (highlighted with a red box 'a'), 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. The left sidebar has 'My request summary' (highlighted with a red box 'b') and a list of request statuses: All (2), Open (1), Closed (1), Rejected (0), and Cancelled (0). The main content area shows a table of request summaries:

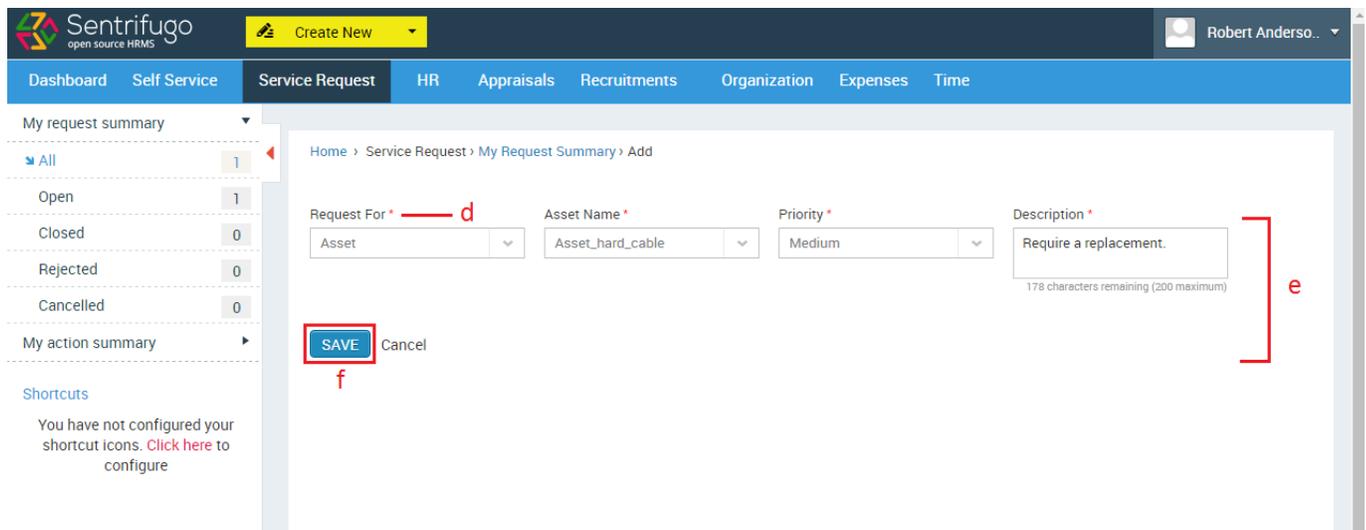
Ticket#	Request For	Category	Request Type/Asset Name	Priority	Description	Raised By	Raised On	Status
SD0006	Asset	Samsung	Samsung Tab	Medium	Kindly provide the Samsung Tab	James HUL	09/14/16	Management appro
SD0005	Asset	Samsung	Samsung Tab	Medium	Please replace my Keyboard.	James HUL	09/14/16	Closed

A '+ Raise a Request' button (highlighted with a red box 'c') is located in the top right of the table area. The page also shows a 'Records per page' dropdown set to 20.

Figure 201

- Click **Service Request** in the top menu
- Click **My request summary** on the left menu panel
- Click **+Raise a Request** button on the right side

Please refer Figure 202



The screenshot shows the 'Add' form for a Service Request. The top navigation bar is the same as in Figure 201. The left sidebar shows 'My request summary' and 'My action summary'. The main content area is the 'Add' form with the following fields:

- Request For \***: A dropdown menu with 'Asset' selected (highlighted with a red box 'd').
- Asset Name \***: A dropdown menu with 'Asset\_hard\_cable' selected.
- Priority \***: A dropdown menu with 'Medium' selected.
- Description \***: A text input field containing 'Require a replacement.' (highlighted with a red box 'e'). A note below the field indicates '178 characters remaining (200 maximum)'.

At the bottom of the form, there is a 'SAVE' button (highlighted with a red box 'f') and a 'Cancel' button.

Figure 202

- Select **Asset** in the field 'Request For'
- Fill in the required details
- Click **SAVE** button



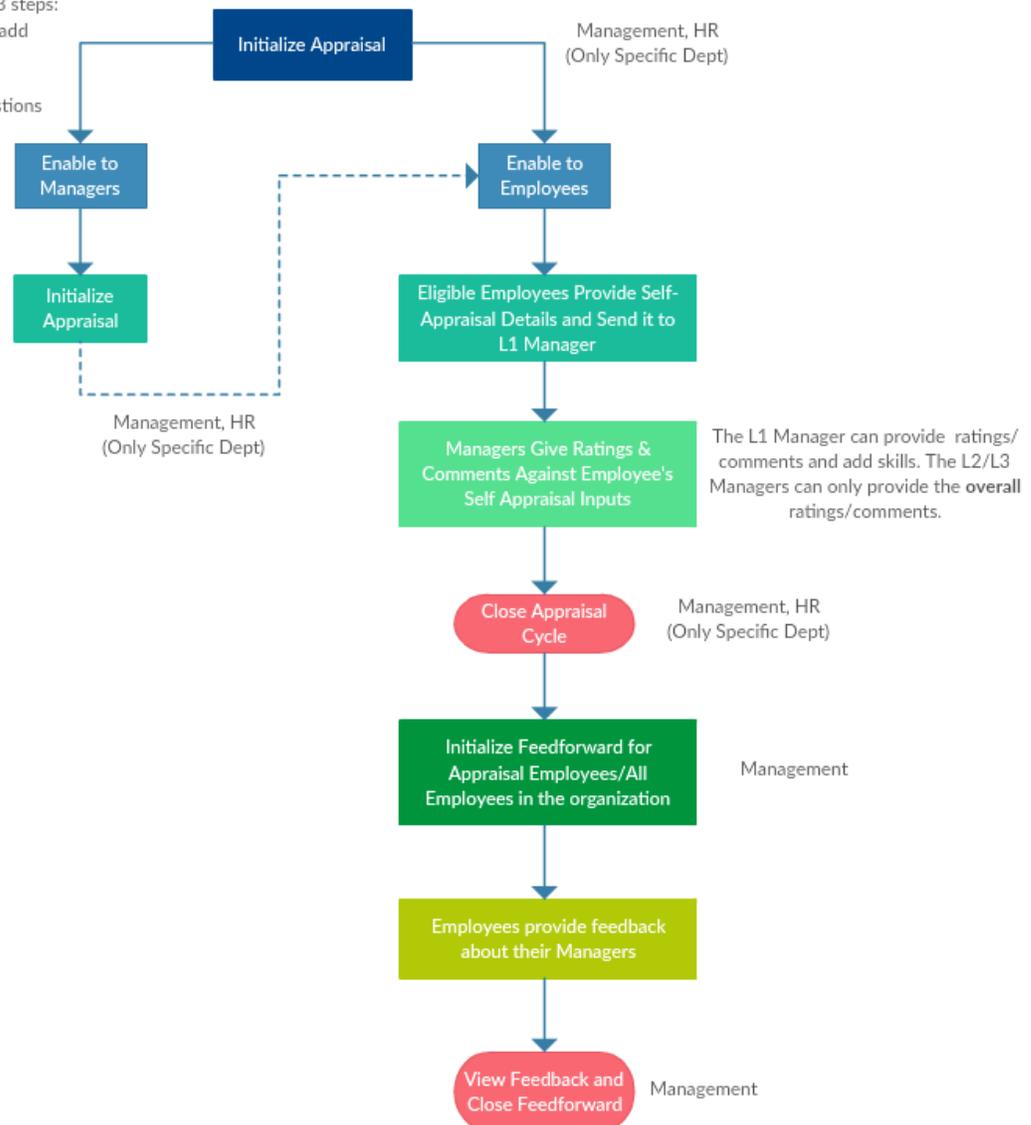
An asset name will only be populated if an asset is allocated to the employee. Also, please ensure the asset category is configured in:  
**Service Request > Configuration > Settings > +Add**

# 16. Appraisals

Performance Appraisal is a systematic evaluation of Employees' performance and to understand their abilities for further career transition. It is generally done by the supervisors on the basis of factors such as parameters, questions, ratings etc. In Sentrifugo, the appraisal is configured for an entire business unit or for a specific department. Below is the flowchart of the appraisal process followed in Sentrifugo:

Initialize Appraisal consists of 3 steps:

- Provide Appraisal details and add Ratings
- Choose Line Managers
- Configure Parameters & Questions



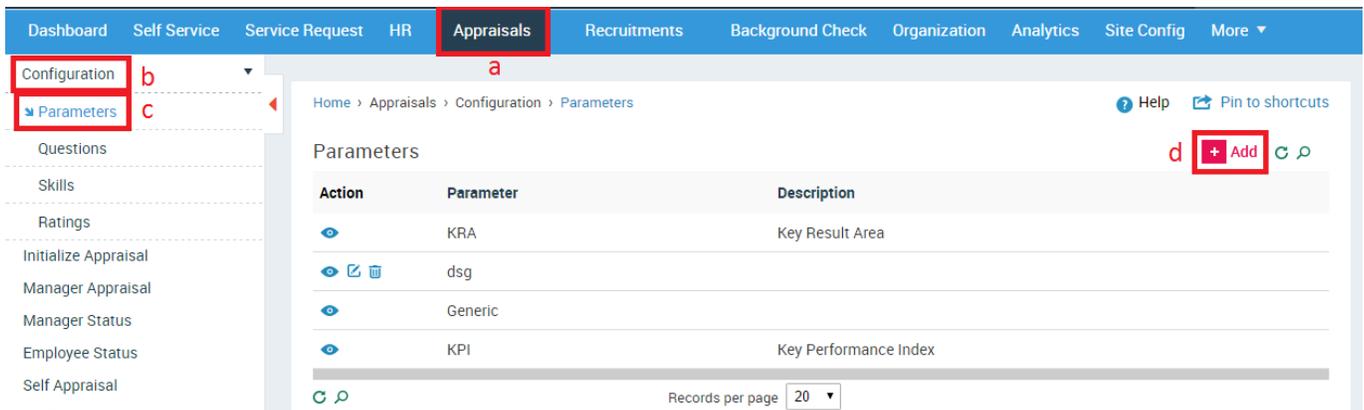
## Process Description:

- A User (Management/HR for only specific department) initializes an appraisal
- The appraisal can be enabled to Managers/Employees
- If it is initialized to the Managers first, then they can assign questions in addition to the ones set by the User who initialized the appraisal.
- After the Managers submit their questions, the appraisal can be enabled to the Employees. (If you don't require a Manager to provide additional questions, then you can directly enable the appraisal to the Employees)
- The eligible Employees will submit their self-appraisal and send it to their L1 Manager.
- L1 Managers will provide their comments and ratings for each question and overall comment and rating for the Employees
- Depending on the number of appraisal levels selected, the L2/L3.. Managers can only provide overall rating and comment
- The User will close the appraisal cycle
- Management will initialize feedforward for Employees who have completed their appraisal or for all Employees
- Employees will provide feedback about their Managers
- Management will view the feedback and close the feedforward process

## 16.1 How do I add Parameters?

Parameters define the performance indicators defined by the supervisors to assess the capabilities of the Employees.

Please refer Figure 203



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Appraisals' (labeled 'a'). The left sidebar menu has 'Configuration' (labeled 'b') and 'Parameters' (labeled 'c') highlighted. The main content area shows a table of parameters with an '+ Add' button (labeled 'd') in the top right corner.

Action	Parameter	Description
	KRA	Key Result Area
	dsg	
	Generic	
	KPI	Key Performance Index

Records per page: 20

Figure 203

- Click **Appraisals** in the top menu
- Click **Configuration** on the left menu panel
- Click **Parameters** in the submenu
- Click **+Add** button on the right side

Please refer Figure 204

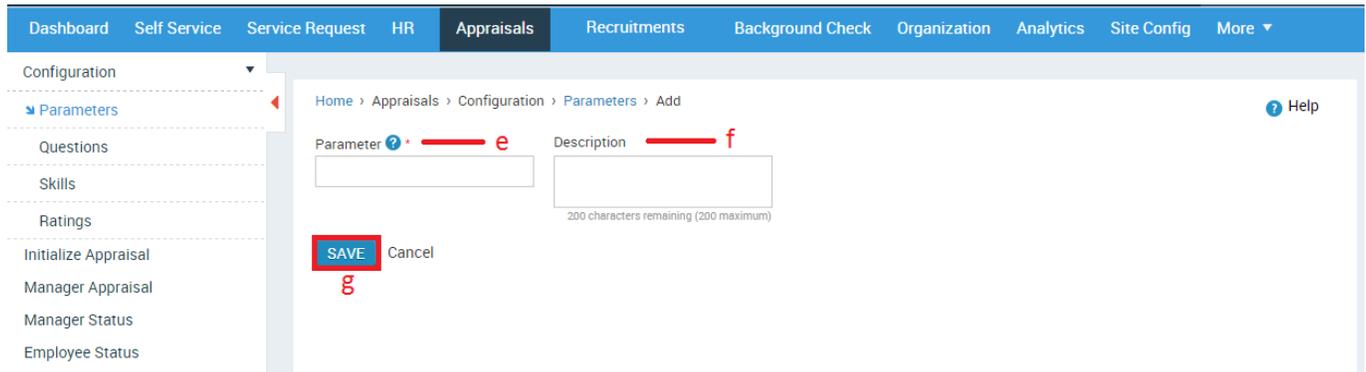


Figure 204

- e. Enter the parameter
- f. Provide Description
- g. Click **SAVE** button

## 16.2 How do I add Questions?

Questions are determined for each parameter defined in the parameters section. For each parameter, the supervisor can provide more than one question.

Please refer Figure 205

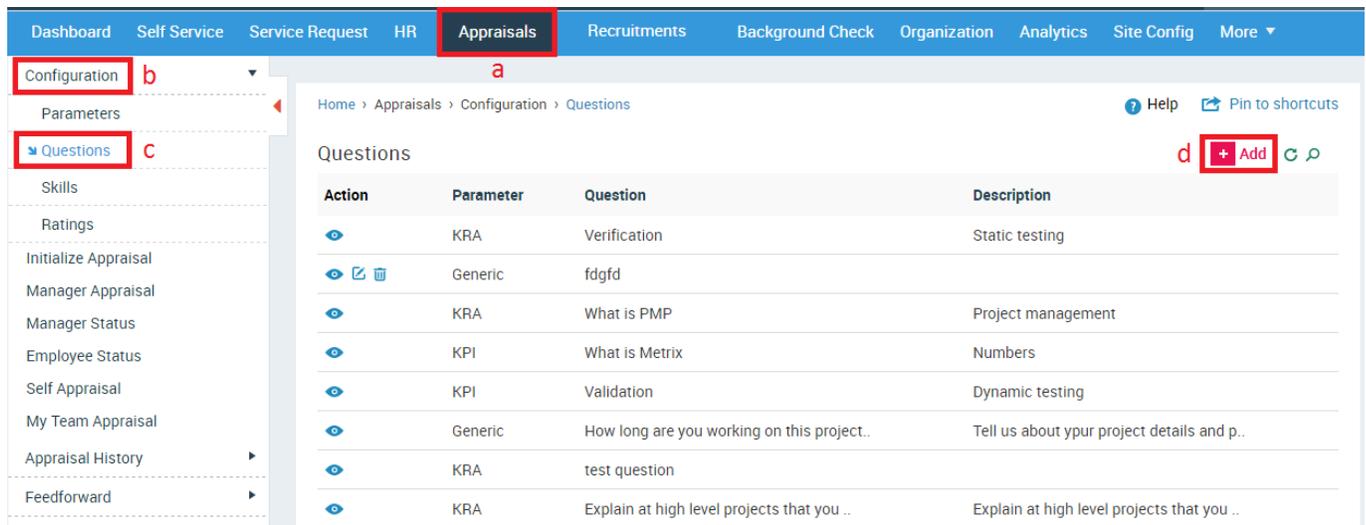


Figure 205

- a. Click **Appraisals** in the top menu
- b. Click **Configuration** on the left menu panel
- c. Click **Questions** in the submenu
- d. Click **+Add** button on the right side

Please refer Figure 206

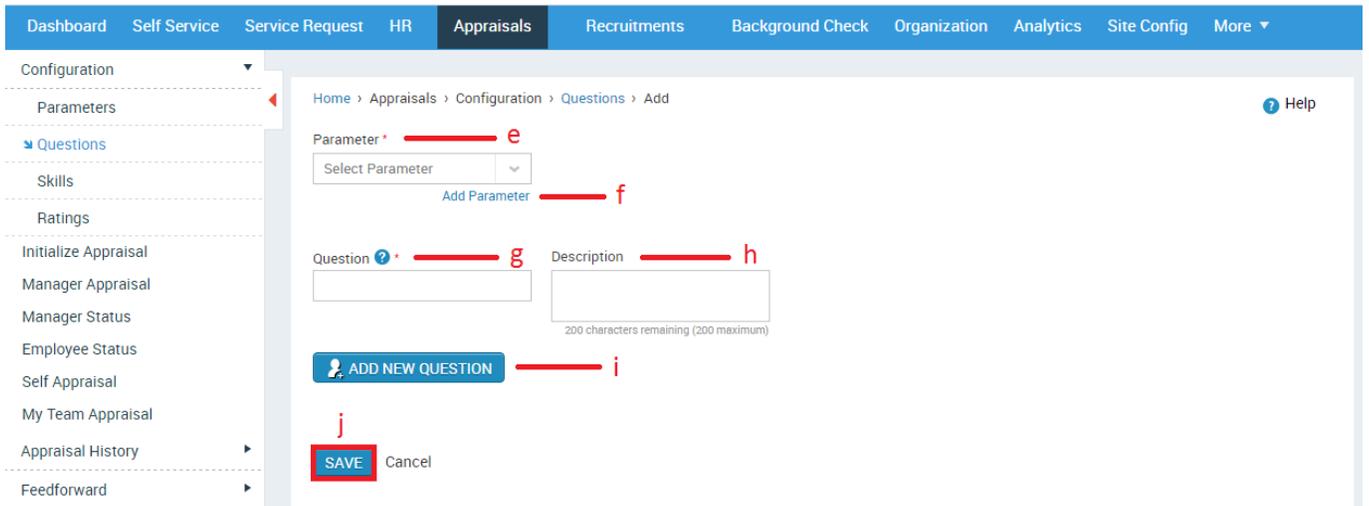


Figure 206

- e. Select a parameter from dropdown
- f. Add other parameter
- g. Enter the question
- h. Provide description
- i. Click **ADD NEW QUESTION** to add a new question
- j. Click **SAVE** button

## 16.3 How do I add Skills?

Skills are the skill set that enhances the Employee's profile.

Please refer Figure 207

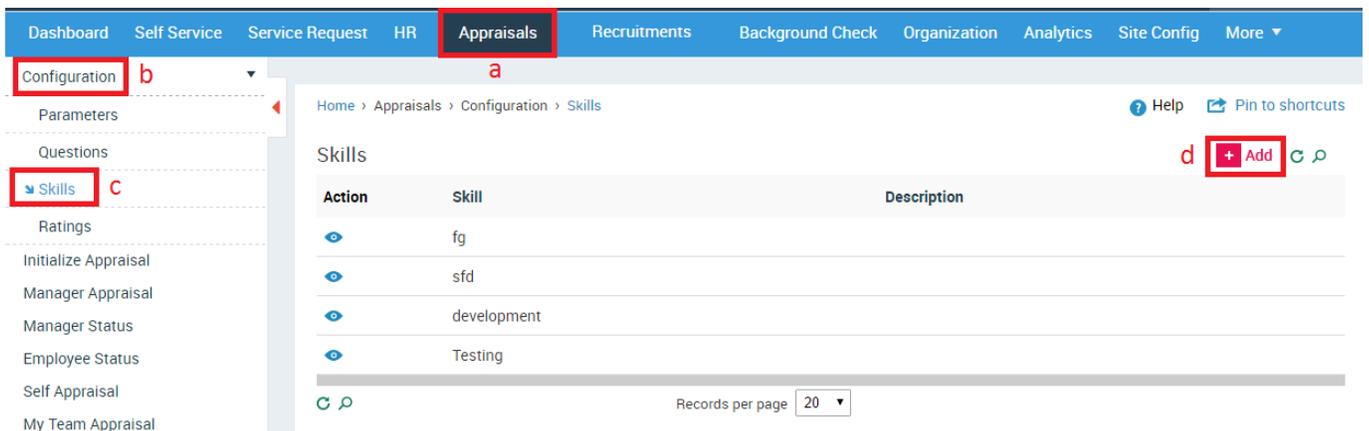


Figure 207

- a. Click **Appraisals** in the top menu

- b. Click **Configuration** on the left menu panel
- c. Click **Skills** in the submenu
- d. Click **+Add** button on the right side

Please refer Figure 208

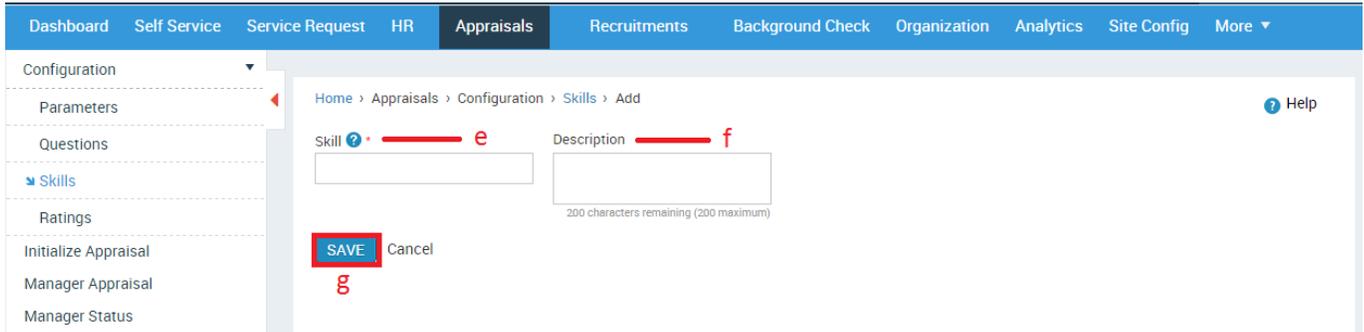


Figure 208

- e. Enter the skill
- f. Provide description if necessary
- g. Click **SAVE** button

## 16.4 How do I add Ratings?

You can add Ratings after completing the first step of Initialize Appraisal. This option is only for editing existing Ratings, provided Employees have not initiated the self-appraisal process

Ratings are defined for each business unit or department. The rating scales **1-5** and **1-10** are available in Sentrifugo.

Please refer Figure 209

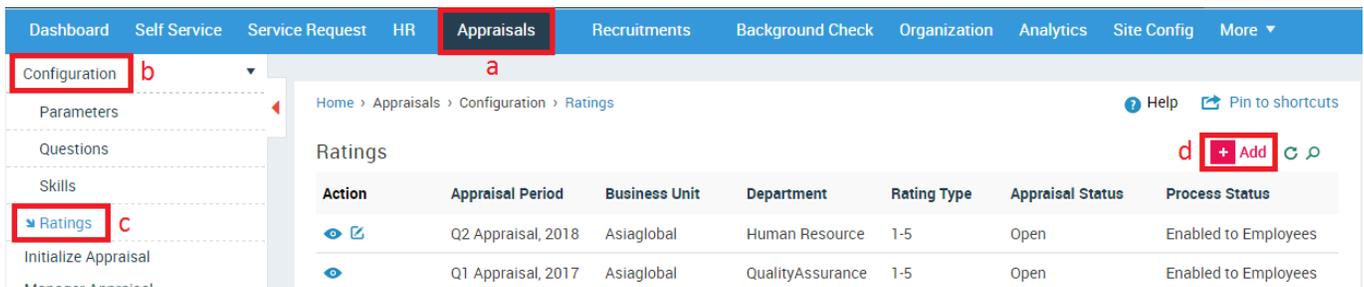


Figure 209

- a. Click **Appraisals** in the top menu
- b. Click **Configuration** on the left menu panel
- c. Click **Ratings** in the submenu
- d. Click **Edit** icon on the right side

Please refer Figure 210

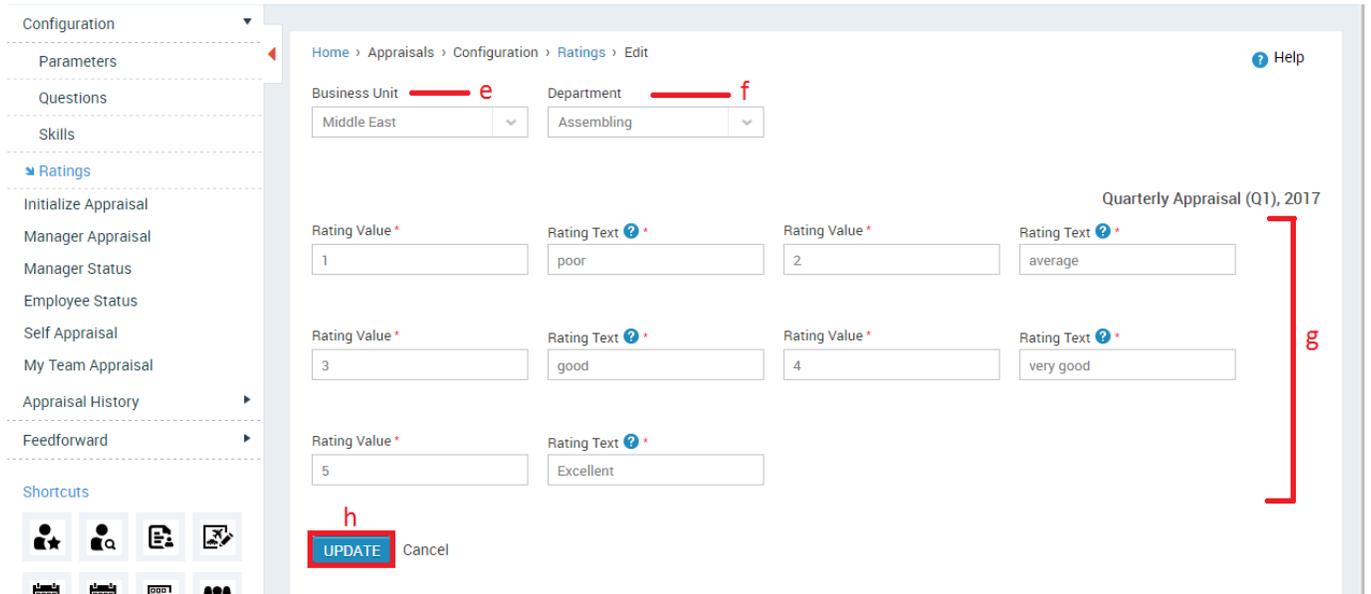


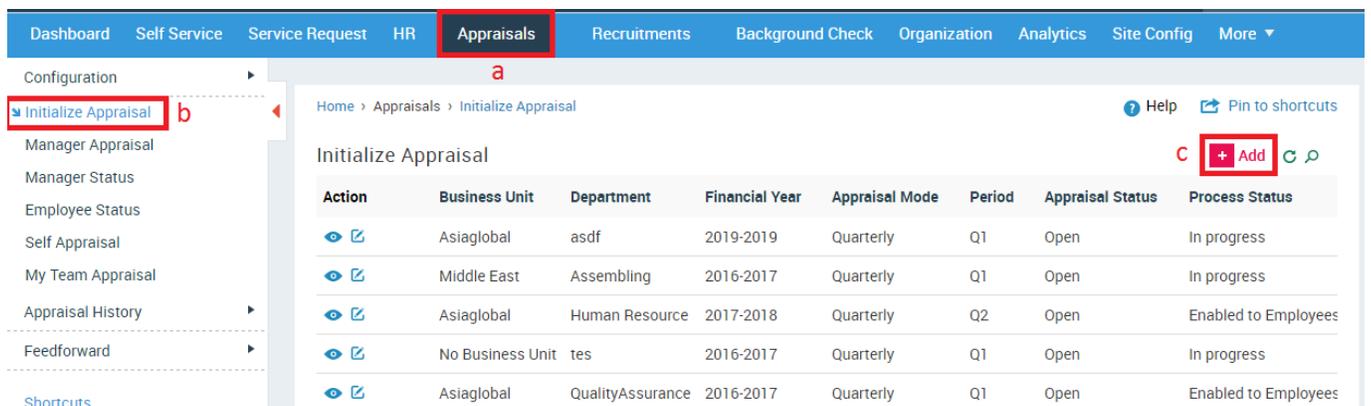
Figure 210

- e. Select a Business Unit from the dropdown list
- f. Select a Department from the dropdown list
- g. Provide rating text for each rating value
- h. Click **UPDATE** to save the ratings

After configuring the essential details, the next step is the initialization of the appraisal process.

## 16.5 How do I Initialize an Appraisal process?

Please refer Figure 211



Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
	Asiaglobal	asdf	2019-2019	Quarterly	Q1	Open	In progress
	Middle East	Assembling	2016-2017	Quarterly	Q1	Open	In progress
	Asiaglobal	Human Resource	2017-2018	Quarterly	Q2	Open	Enabled to Employees
	No Business Unit	tes	2016-2017	Quarterly	Q1	Open	In progress
	Asiaglobal	QualityAssurance	2016-2017	Quarterly	Q1	Open	Enabled to Employees

Figure 211

- a. Click **Appraisals** in the top menu
- b. Click **Initialize Appraisal** on the left menu panel
- c. Click **+Add** button

Please refer Figure 212

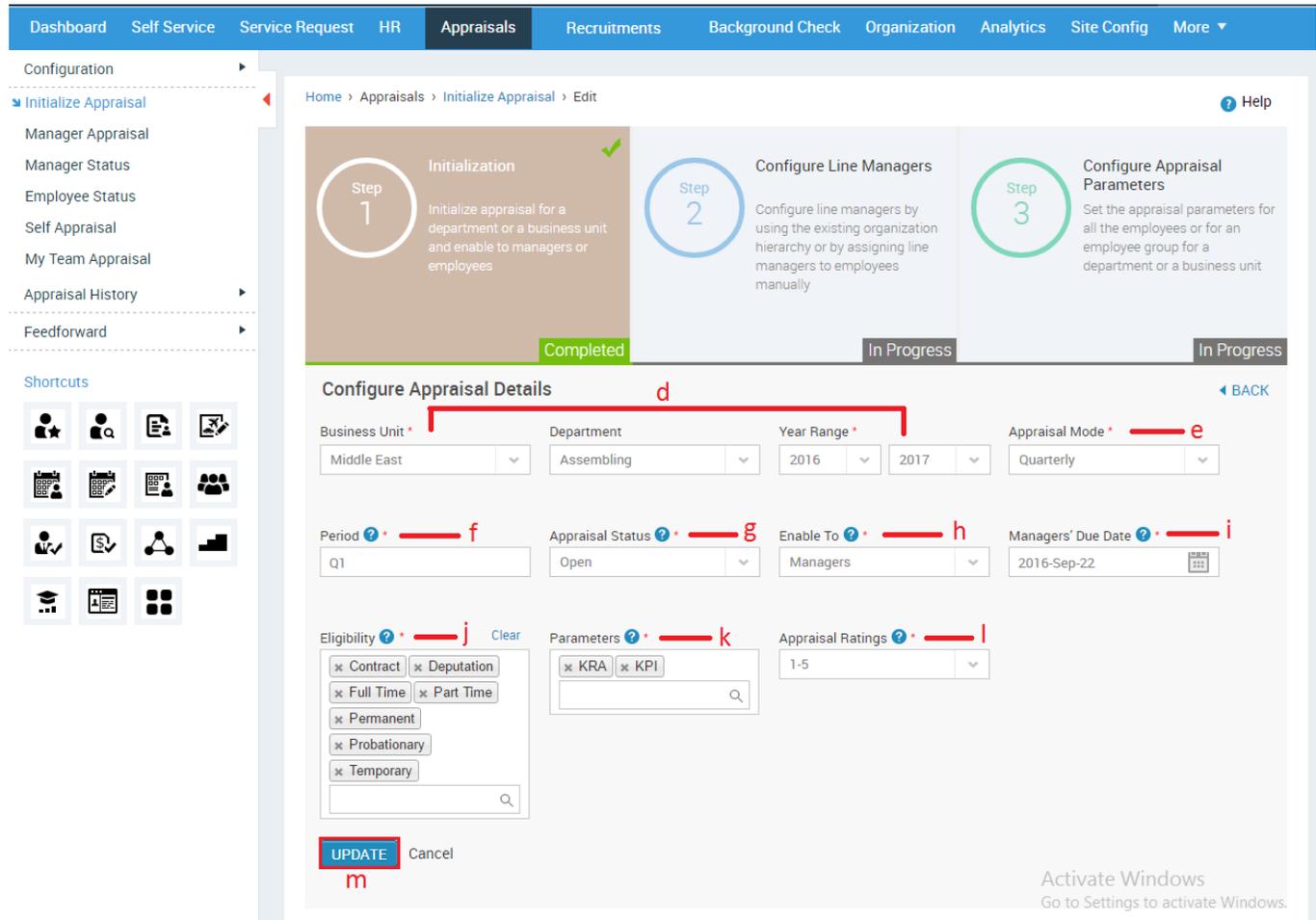


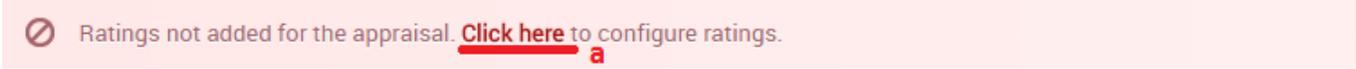
Figure 212

## Step 1: Initialization

- d. Enter the required details (Business Unit, Department, Year Range)
- e. There are 3 appraisal modes available: Quarterly (Q1, Q2, Q3, Q4), Half-Yearly (H1, H2), Yearly
- f. Period will be populated automatically depending on the appraisal mode you have selected
- g. Appraisal Status is by default 'Open' in Initialize appraisal
- h. Select an option in 'Enable To' dropdown. You can enable to Managers/Employees
- i. Based on the Enable To option, set a due date for the Employees/Managers to submit the appraisal details
- j. Select one or more eligibility criteria (Employees who are eligible for the appraisal process)
- k. Select parameter(s)
- l. Select a Ratings range (1-5 or 1-10)
- m. Click **SAVE** button to initialize appraisal for a Business Unit/Department

You will need to define the ratings before you proceed to **Step 2**.

Please refer Figure 213



⊘ Ratings not added for the appraisal. Click here to configure ratings. a

Figure 213

- a. Click here to provide text to represent the rating numbers

Please refer section [How do I add Ratings?](#) to find out how to provide rating text.

## Step 2: Configure Line Managers

Once the appraisal process is initiated for a Business Unit/Department, the Line Managers must be configured to evaluate the Employees' appraisal.

The Line Managers can be configured in two ways:

### 1. Choose by Organization Hierarchy

- Establish appraisal process as per the organization hierarchy where the Line Managers will be the same as the Reporting Managers
- Define the number of appraisal levels and assign Line Managers to the Employees
- Save the configuration to apply to the selected department or business unit

Please refer Figure 214

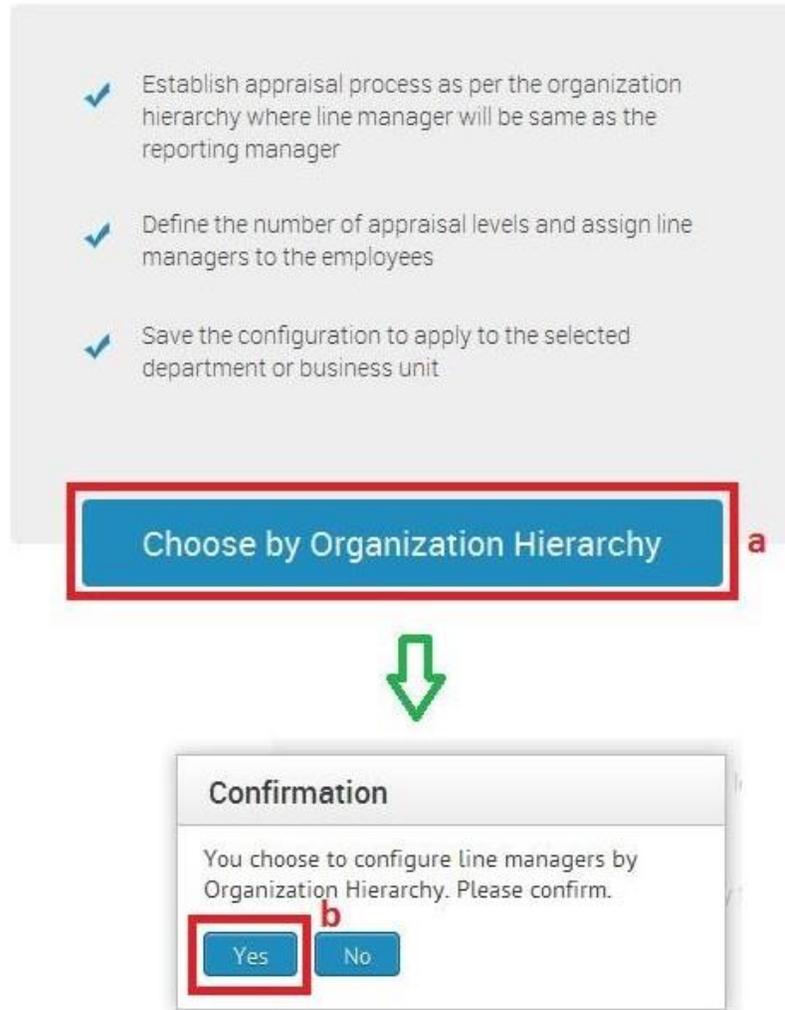


Figure 214

- Click **Choose by Organization Hierarchy** button

A small confirmation window will appear.

- Click **Yes** button

Please refer Figure 215

Home > Appraisals > Initialize Appraisal > Edit ? Help

**Step 1** Initialization ✓

Initialize appraisal for a department or a business unit and enable to managers or employees

Completed

**Step 2** Configure Line Managers

Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually

In Progress

**Step 3** Configure Appraisal Parameters

Set the appraisal parameters for all the employees or for an employee group for a department or a business unit

In Progress

Business Unit : General Administration    Department : Hardware    Quarterly Appraisal (Q1), 2016

### Configure Line Managers by Organization Hierarchy ◀ BACK

 Raj Davuluri SE0006 Admin Head	L1 Manager	Employee(s) 1	<span style="color: red; font-weight: bold;">d</span> 
 George Rimes SE0011 Manager	L1 Manager	Employee(s) 1	

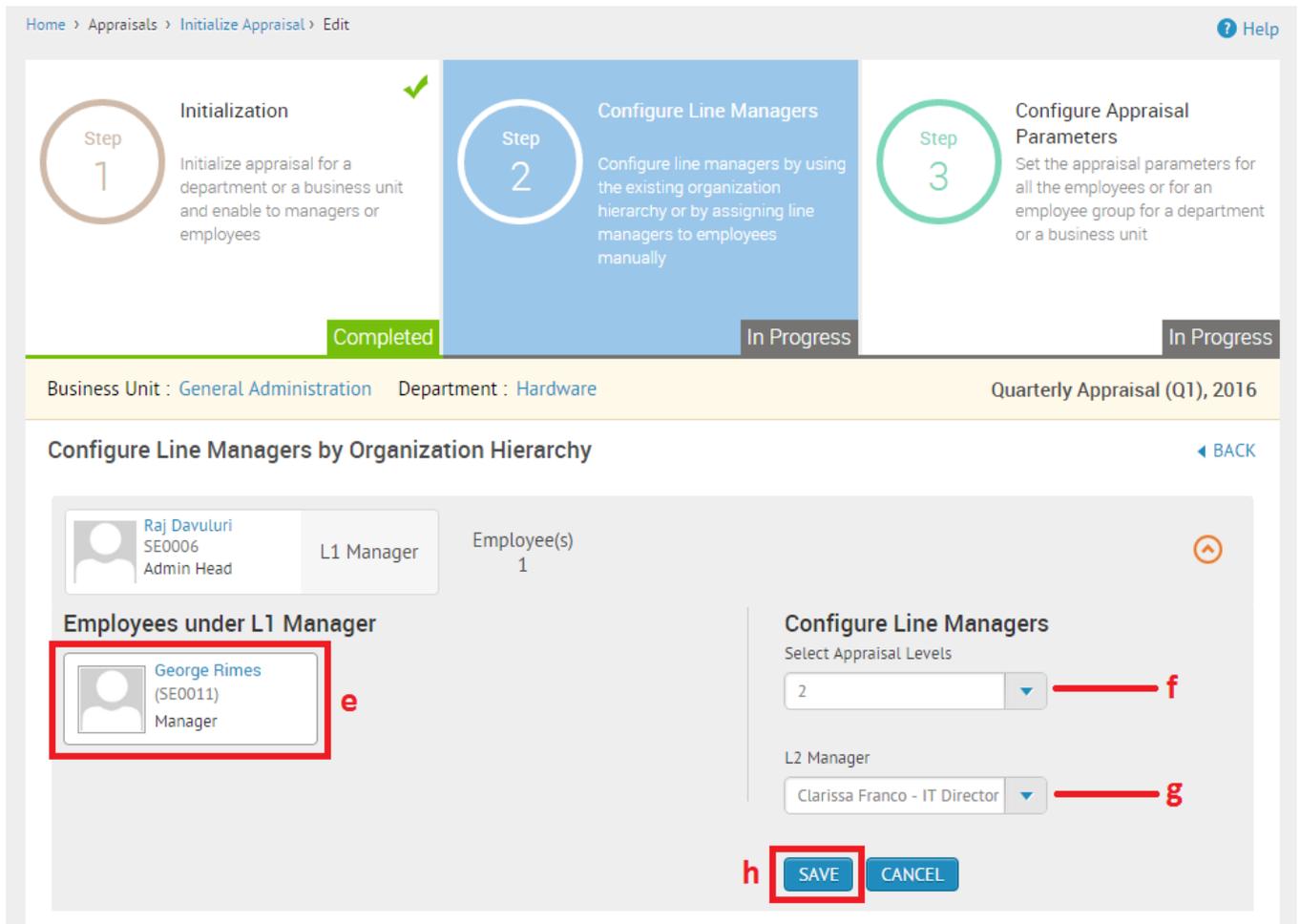
c

SAVE

Figure 215

- c. Manager(s)' names will be displayed
- d. Click here to view the Employees reporting to the displayed Managers

Please refer Figure 216



Home > Appraisals > Initialize Appraisal > Edit ? Help

**Step 1** Initialization ✓

Initialize appraisal for a department or a business unit and enable to managers or employees

**Completed**

**Step 2** Configure Line Managers

Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually

**In Progress**

**Step 3** Configure Appraisal Parameters

Set the appraisal parameters for all the employees or for an employee group for a department or a business unit

**In Progress**

Business Unit : General Administration    Department : Hardware    Quarterly Appraisal (Q1), 2016

### Configure Line Managers by Organization Hierarchy ◀ BACK



**Raj Davuluri**  
SE0006  
Admin Head

L1 Manager

Employee(s)  
1

⬆

**Employees under L1 Manager**



**George Rimes**  
(SE0011)  
Manager

e

**Configure Line Managers**

Select Appraisal Levels

▼
f

L2 Manager

▼
g

h

SAVE

CANCEL

Figure 216

- e. The Employees reporting to the Manager will be displayed here
- f. Select the number of appraisal levels you want (We have selected '2' in this example). You can have a maximum of 5 appraisal levels.
- g. Select your L1/L2... Manager(s)
- h. Click **SAVE** button



If you have only 1 appraisal level, then you don't need to select any appraisal level. Click **SAVE** button to proceed to the next step.

## 2. Assign Line Managers to Employees

- Define the number of appraisal levels
- Determine the Line Managers as per the selected appraisal levels
- Add or remove Employees based on the selected Line Managers

Please refer Figure 217

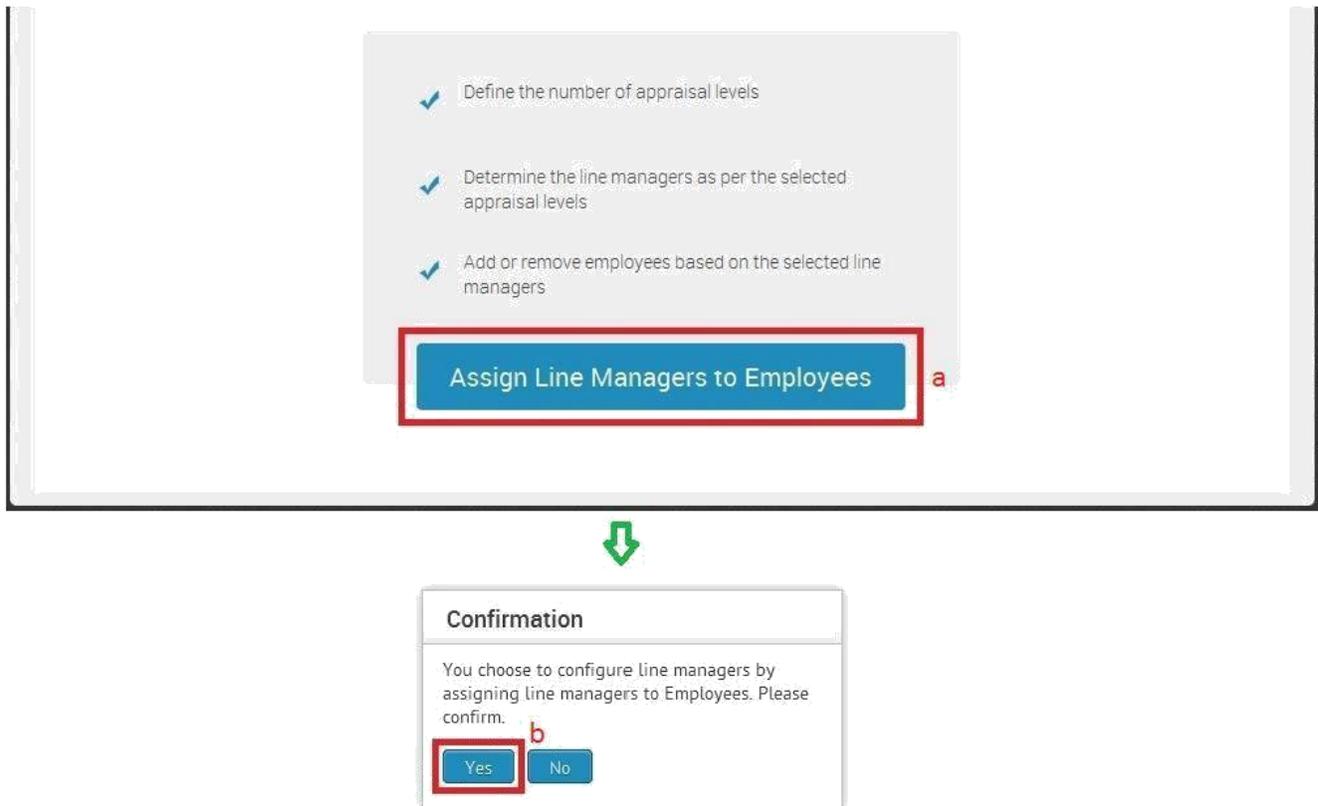


Figure 217

a. Click **Assign Line Managers to Employees**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 218

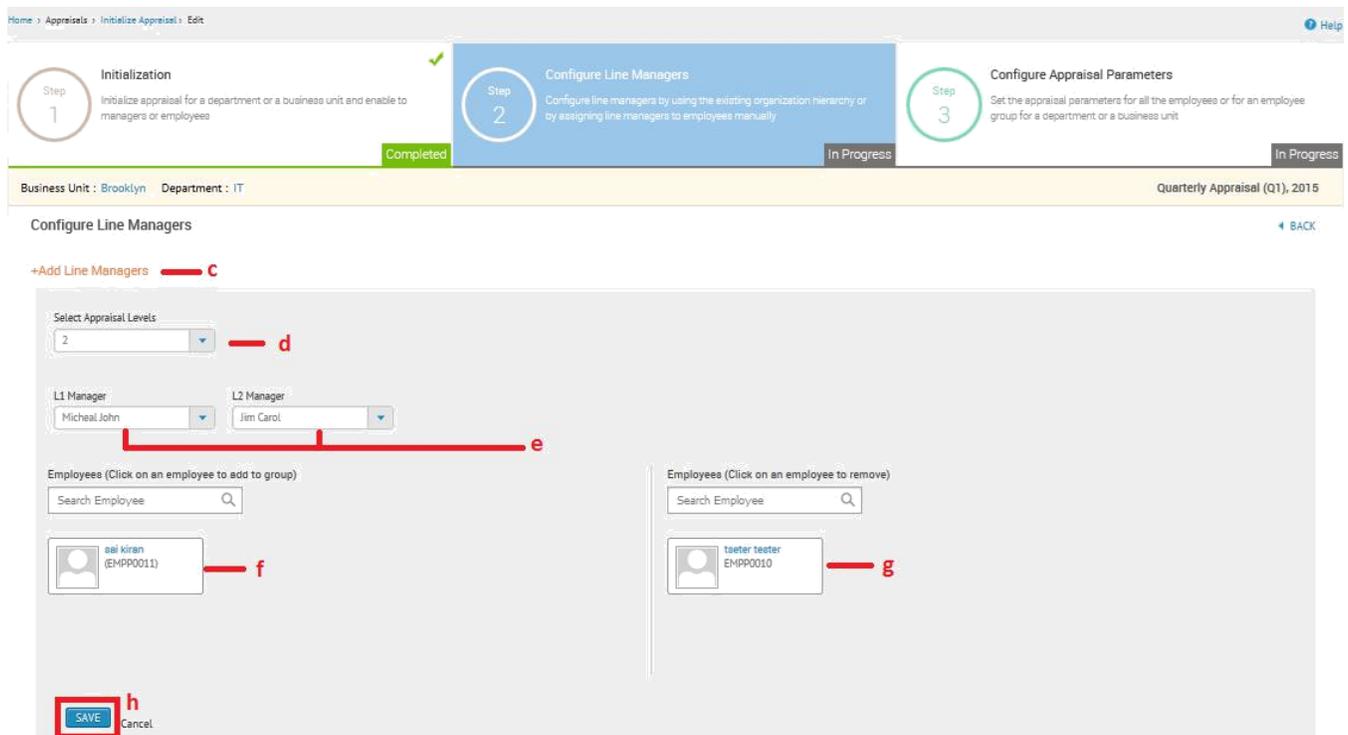


Figure 218

- c. Click **+Add Line Managers**
- d. Select the number of appraisal levels
- e. Based on the number of appraisal levels, select the Line Managers
- f. Employees are displayed on the bottom left
- g. Click on the Employee(s) on the left side to select them for the appraisal process
- h. Click **SAVE** button

### Step 3: Configure Appraisal Parameters

Configure the appraisal parameters after configuring the Line Managers. Here, the appraisal process can be made applicable to all Employees of the **Business Unit** or **Customized Employee Groups**. This step can be done in two ways:

#### 1. All Employees

- Questions created for the selected parameters in initialization step will be displayed
- Choose or add questions to be enabled to all Employees for the selected business unit or department
- Choose ratings and/or comments for each question by Line Manager and Employee

Please refer Figure 219

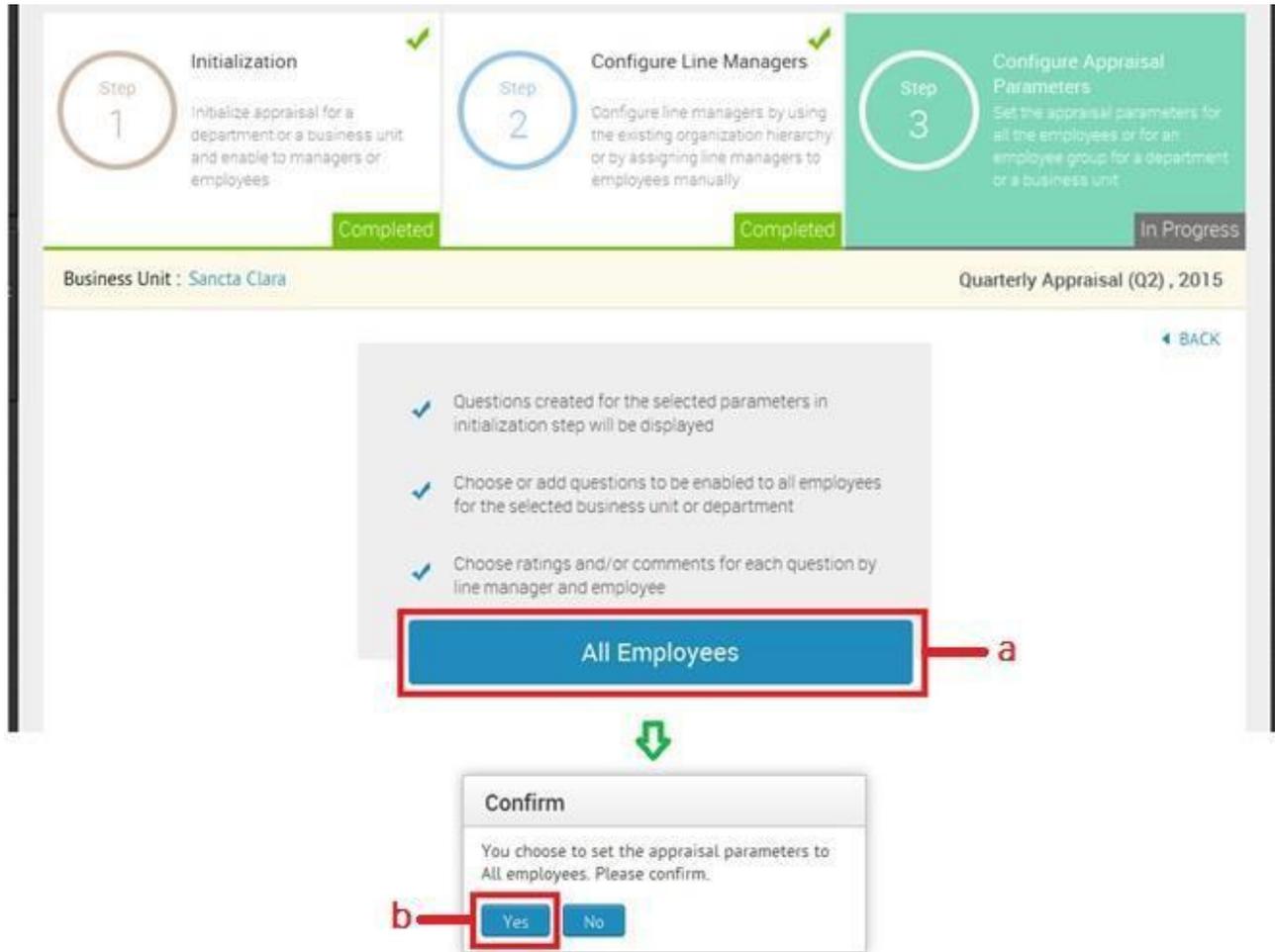


Figure 219

a. Click **All Employees**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 220

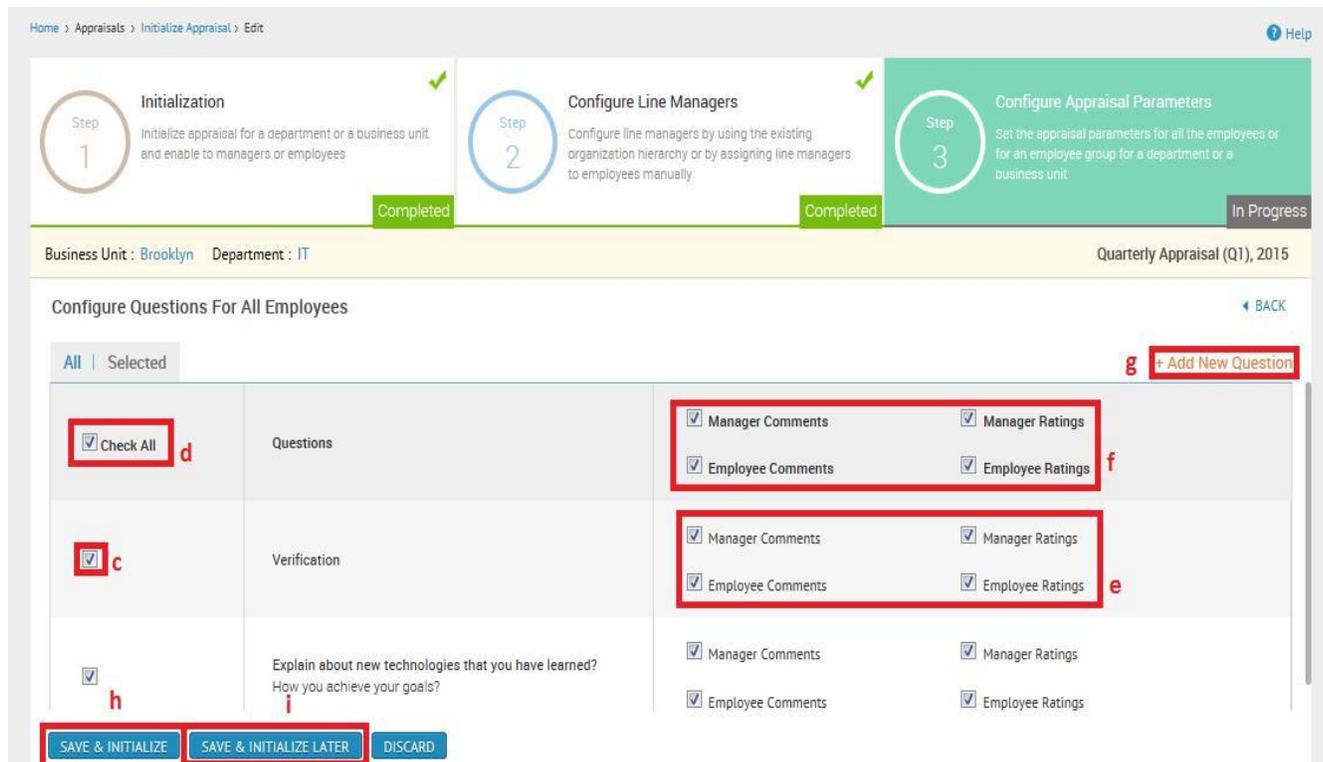


Figure 220

- c. Select Questions individually by checking the checkbox respective to each question

**Or**

- d. Select all the questions by checking the **Check All** option in the table header
- e. Enable Manager/Employee Comments or Manager/Employee Ratings for a specific question. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.

**Or**

- f. Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
- g. Click **+Add New Question** option to add more questions to the appraisal process
- h. Click **SAVE & INITIALIZE** button to initialize the appraisal

**Or**

- i. Click **SAVE & INITIALIZE LATER** button to only save the appraisal details

## 2. Customized Employee Groups

- Apply appraisal parameters by grouping Employees
- Choose or add questions to be enabled to all Employees for the selected business unit or department
- Choose ratings and/or comments for each question by Line Manager and Employee

Please refer Figure 222

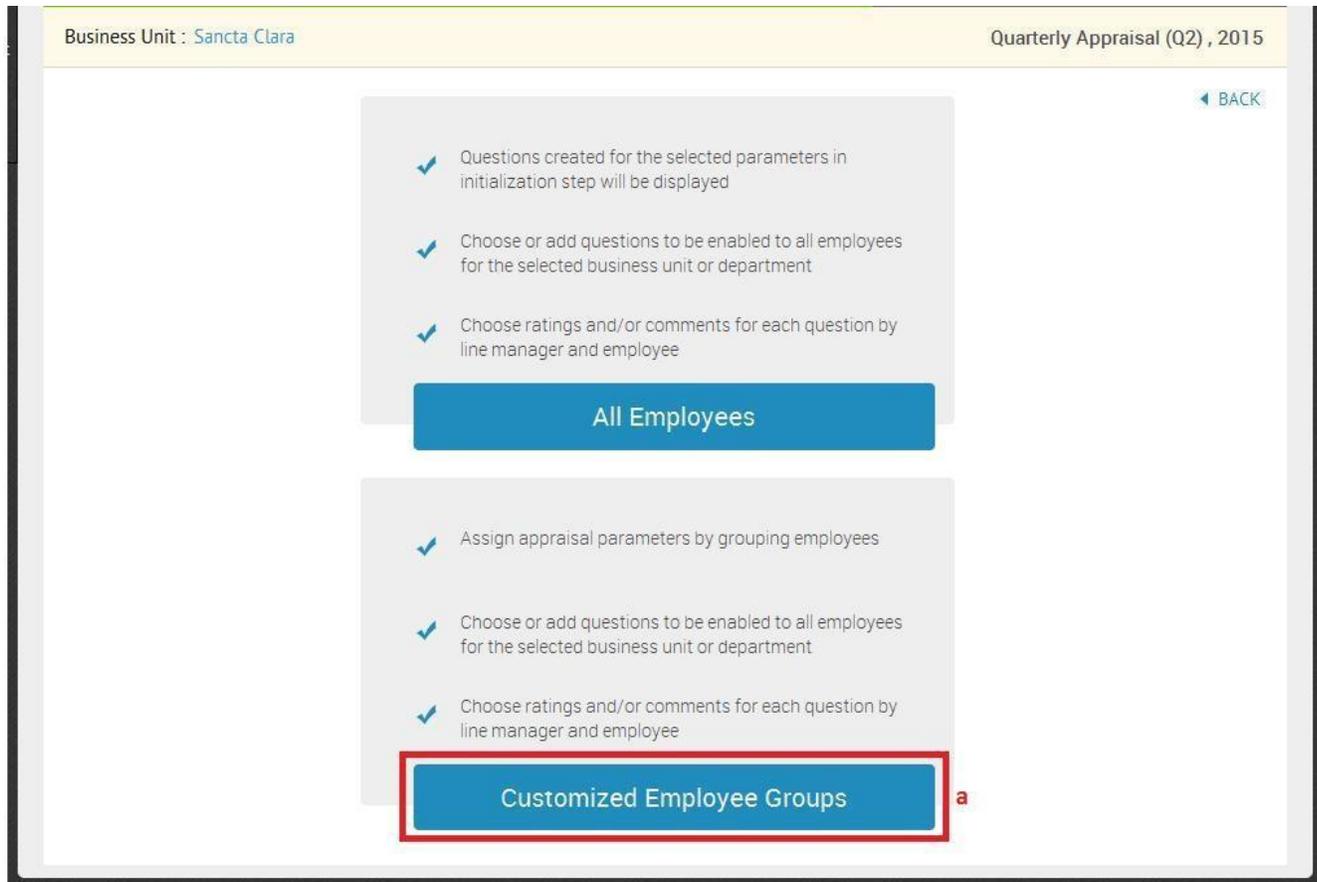


Figure 222

a. Click **Customized Employee Groups**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 223

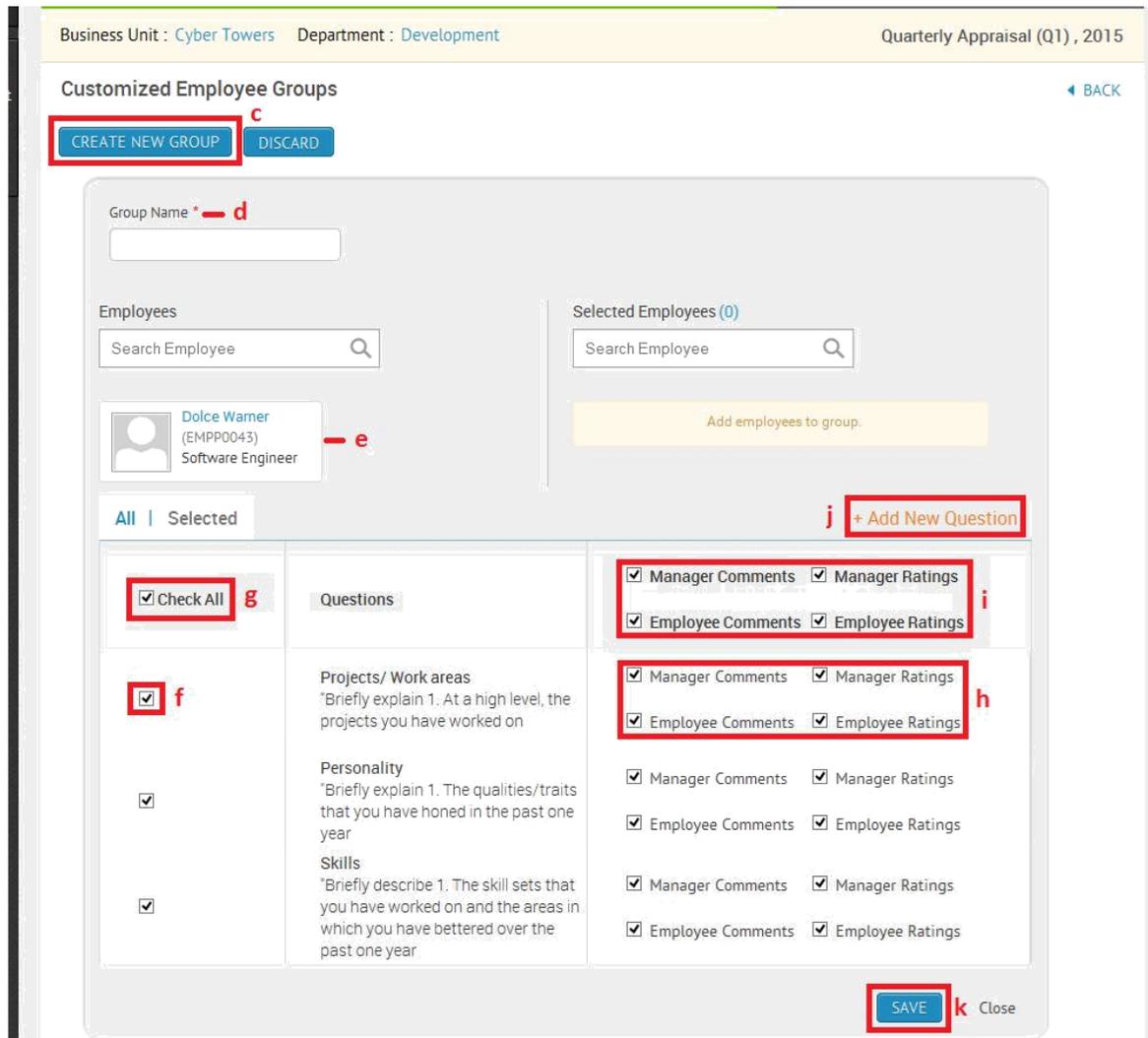


Figure 223

- c. Click **CREATE NEW GROUP** button
- d. Enter group name
- e. Select Employees applicable for the appraisal process
- f. Select questions individually

Or

- g. Select all the questions by selecting **Check All**
- h. Enable Manager/Employee Comments or Manager/Employee Ratings for a specific question. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.

Or

- i. Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
- j. Click **+Add New Question** option to add more questions to the appraisal process
- k. Click **SAVE** button

Please refer Figure 224

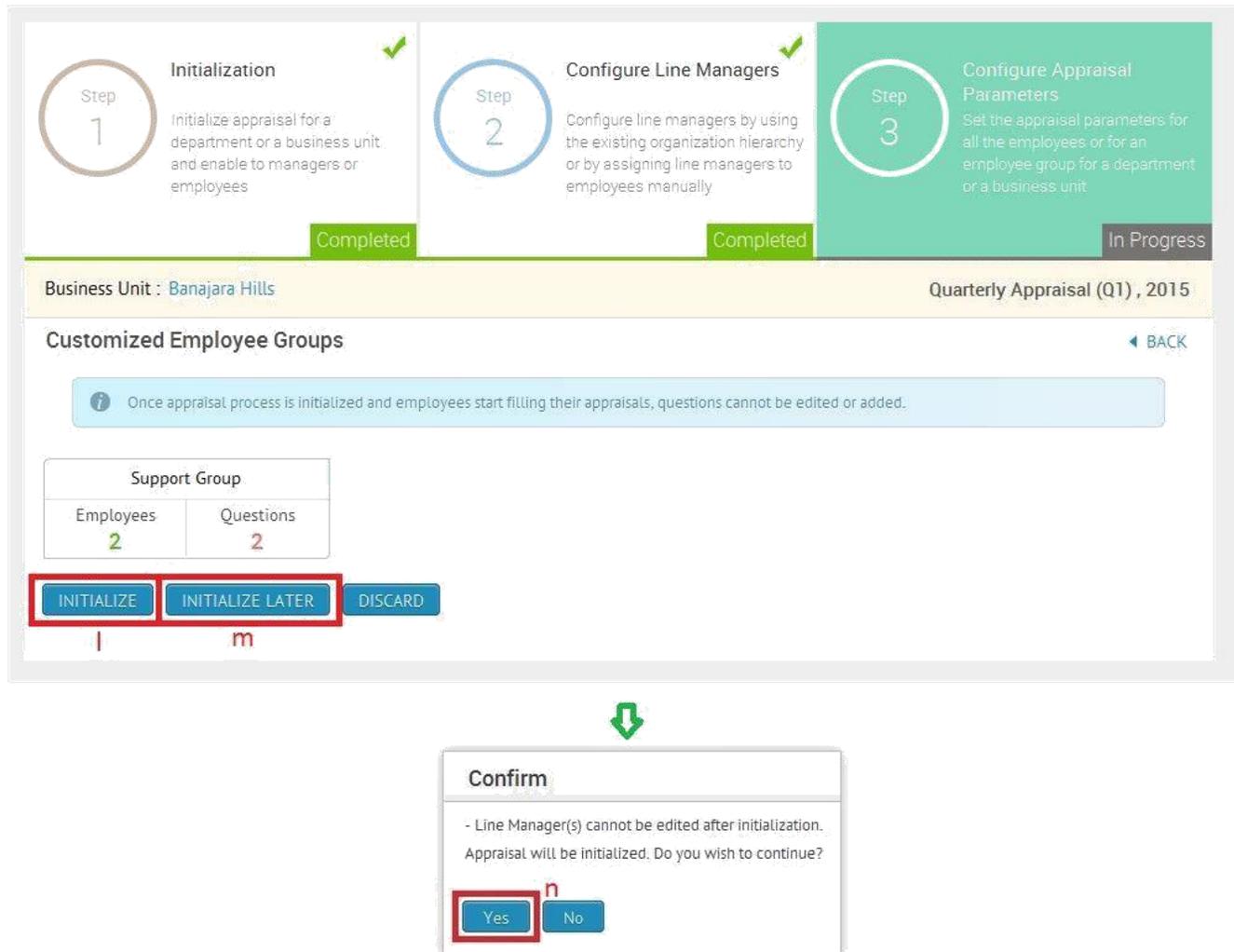


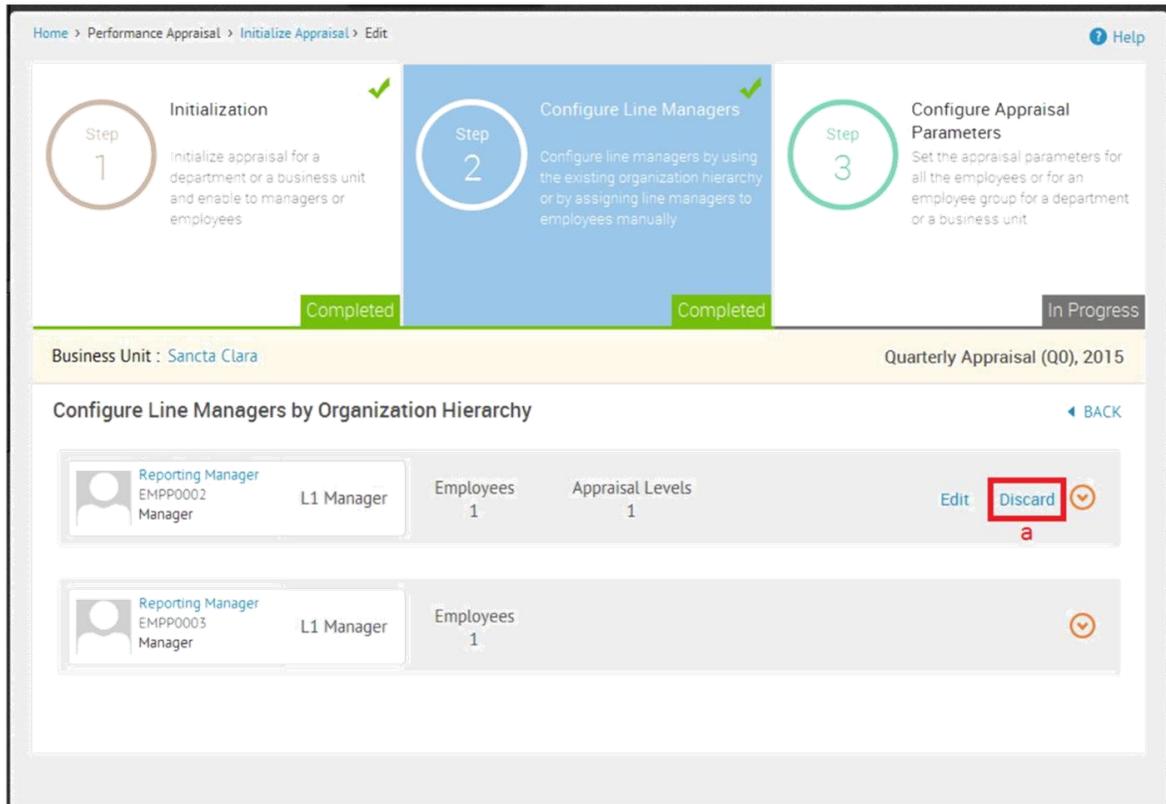
Figure 224

- l. Upon saving the appraisal parameters, click **INITIALIZE** button to initialize the appraisal process
- m. Click **INITIALIZE LATER** button to only save the appraisal process
- n. Click **Yes** button in the confirmation box to initialize the appraisal

## 16.6 How do I undo/discard Line Manager Configuration?

You can discard the Line Managers' configuration after saving the appraisal process in **Step 2**.

Please refer Figure 224



OR

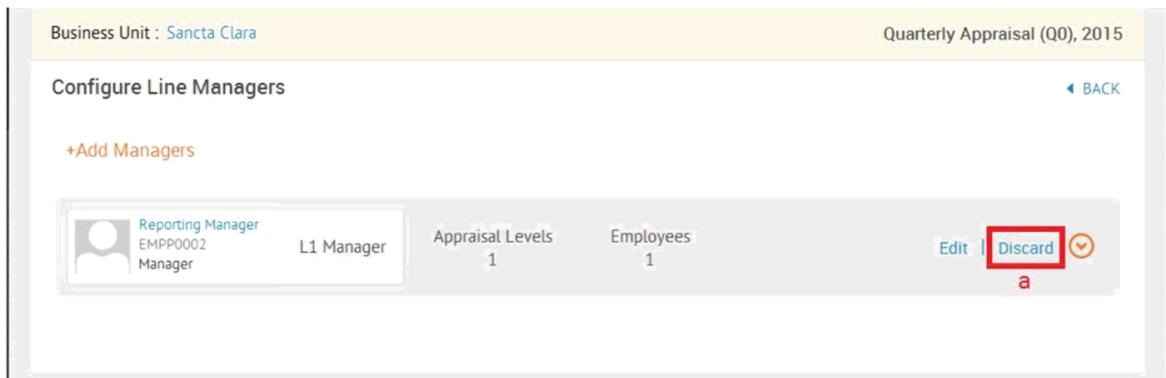


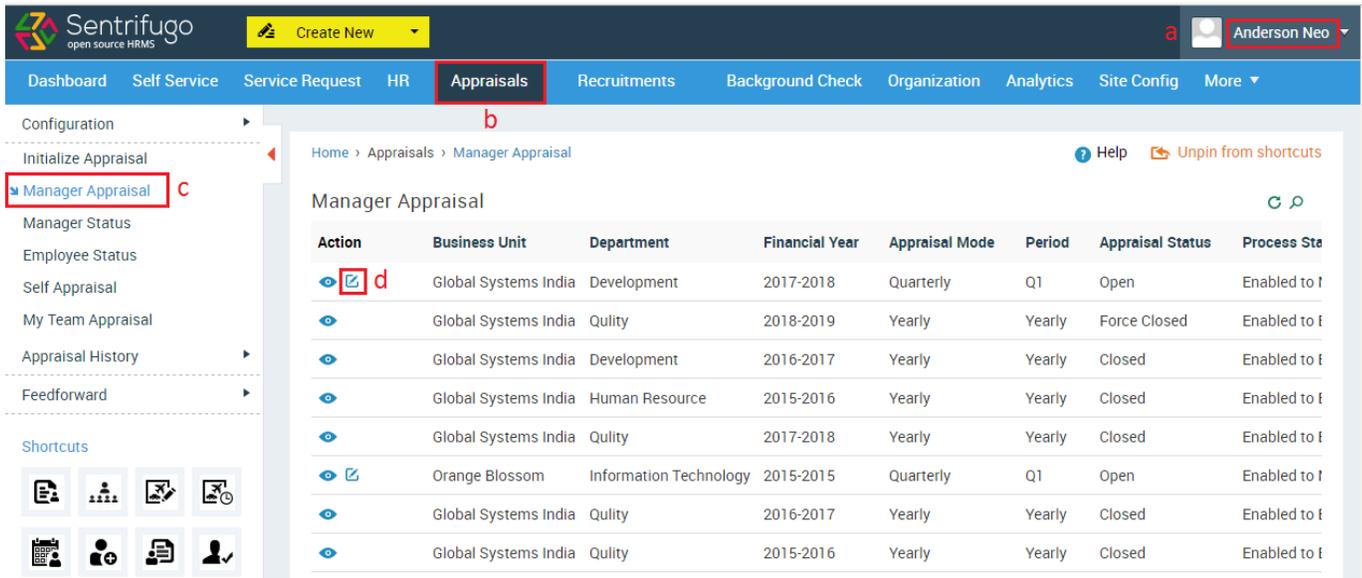
Figure 224

- a. Click **Discard** option to remove the Line Manager configurations

## 16.7 How do I set additional appraisal questions as a Manager?

In the first step of Initialize appraisal, if the appraisal is enabled to the Managers, then Managers can set questions in addition to the ones initially added by the HR/Management. Once the parameters are set, Managers can create Employee groups and apply the appraisal parameters to the group.

Please refer Figure 225



Home > Appraisals > Manager Appraisal

Manager Appraisal

Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Sta
 d	Global Systems India	Development	2017-2018	Quarterly	Q1	Open	Enabled to f
	Global Systems India	Quality	2018-2019	Yearly	Yearly	Force Closed	Enabled to f
	Global Systems India	Development	2016-2017	Yearly	Yearly	Closed	Enabled to f
	Global Systems India	Human Resource	2015-2016	Yearly	Yearly	Closed	Enabled to f
	Global Systems India	Quality	2017-2018	Yearly	Yearly	Closed	Enabled to f
	Orange Blossom	Information Technology	2015-2015	Quarterly	Q1	Open	Enabled to f
	Global Systems India	Quality	2016-2017	Yearly	Yearly	Closed	Enabled to f
	Global Systems India	Quality	2015-2016	Yearly	Yearly	Closed	Enabled to f

Figure 225

- a. Login as a Manager
- b. Click **Appraisals** in the top menu
- c. Click **Manager Appraisal** on the left menu panel
- d. Click **Edit** icon against an appraisal process

Please refer Figure 226

### Initialization Details ◀ BACK

Business Unit	Jublee Hills	Department	--
Appraisal Mode	Half yearly	From Year	2014
To Year	2015	Period	H1
Status	Open	Eligibility	Full Time,Permanent,Probationary
Enable To	Managers	Parameters	Generic
Managers Due Date	05/27/15	Process Status	Enabled to Managers
Appraisal Ratings	1-5		

### Group Details

CREATE NEW GROUP
SUBMIT INITIALIZATION

Group Name \* e

Employees


Employee 1  
(EMPP0029)  
Software Engineer

Selected Employees (0)


Employee 8  
(EMPP0029)  
Software Engineer

Configure Appraisal Parameters for All Employees

All | Selected
+ Add New Question g

<input checked="" type="checkbox"/> Check All <span style="font-size: 0.8em;">i</span>	Questions	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <span style="font-size: 0.8em;">k</span> <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings
<input checked="" type="checkbox"/> <span style="font-size: 0.8em;">h</span>	New Technologies/skills learn and implemented What are the new technologies/skills you explored and implemented?	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <span style="font-size: 0.8em;">j</span> <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings
<input checked="" type="checkbox"/>	Responsibility Have you taken complete ownership of the task/project/product assigned to you?	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings

SAVE | Close

Figure 226

- e. Create new group (E.g., Support, Testing, Development, etc.)
- f. Add Employees to the group by clicking on an Employee
- g. Click **Add New Question** option to add questions for a particular group of Employees
- h. Select Questions individually

Or

- i. Select all the questions by selecting **Check All**
- j. Enable Manager/Employee Comments or Manager/Employee Ratings for a specific question. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.

Or

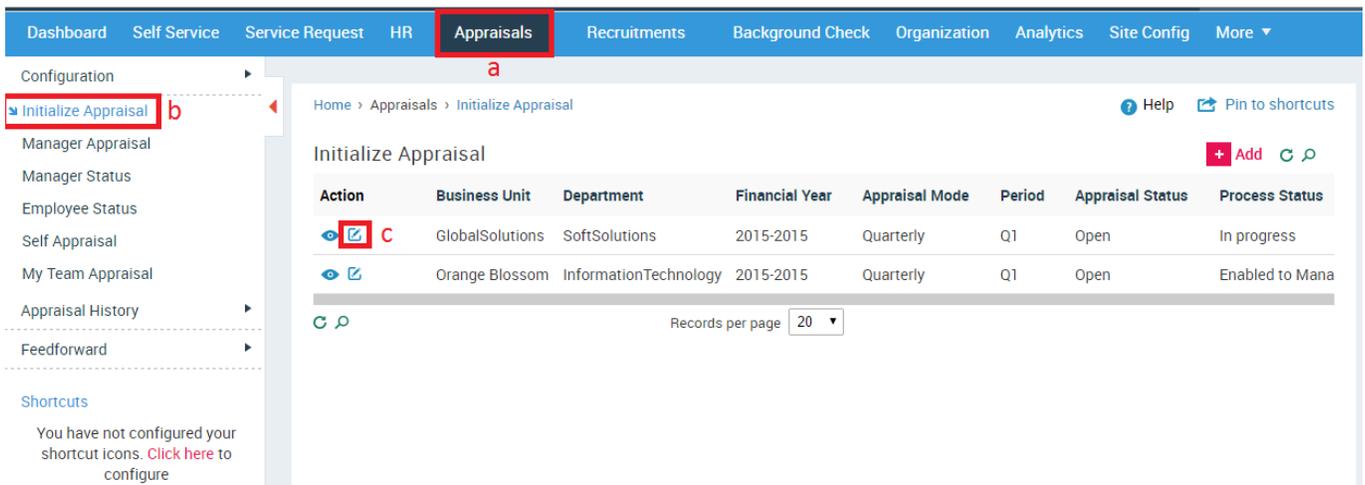
- k. Select Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
- l. Click **SAVE** button

Upon saving appraisal details, the Manager must **SUBMIT** the appraisal process for initialization.

## 16.8 How do I enable the appraisal to Employees?

You can update the appraisal process by changing the process status from “Enable to Managers” to “Enable to Employees” and providing Employee Due Date.

Please refer Figure 227



The screenshot displays the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The 'Appraisals' menu item is highlighted with a red box and labeled 'a'. The left sidebar shows 'Configuration' with 'Initialize Appraisal' highlighted by a red box and labeled 'b'. The main content area shows the 'Initialize Appraisal' page with a table of appraisal entries.

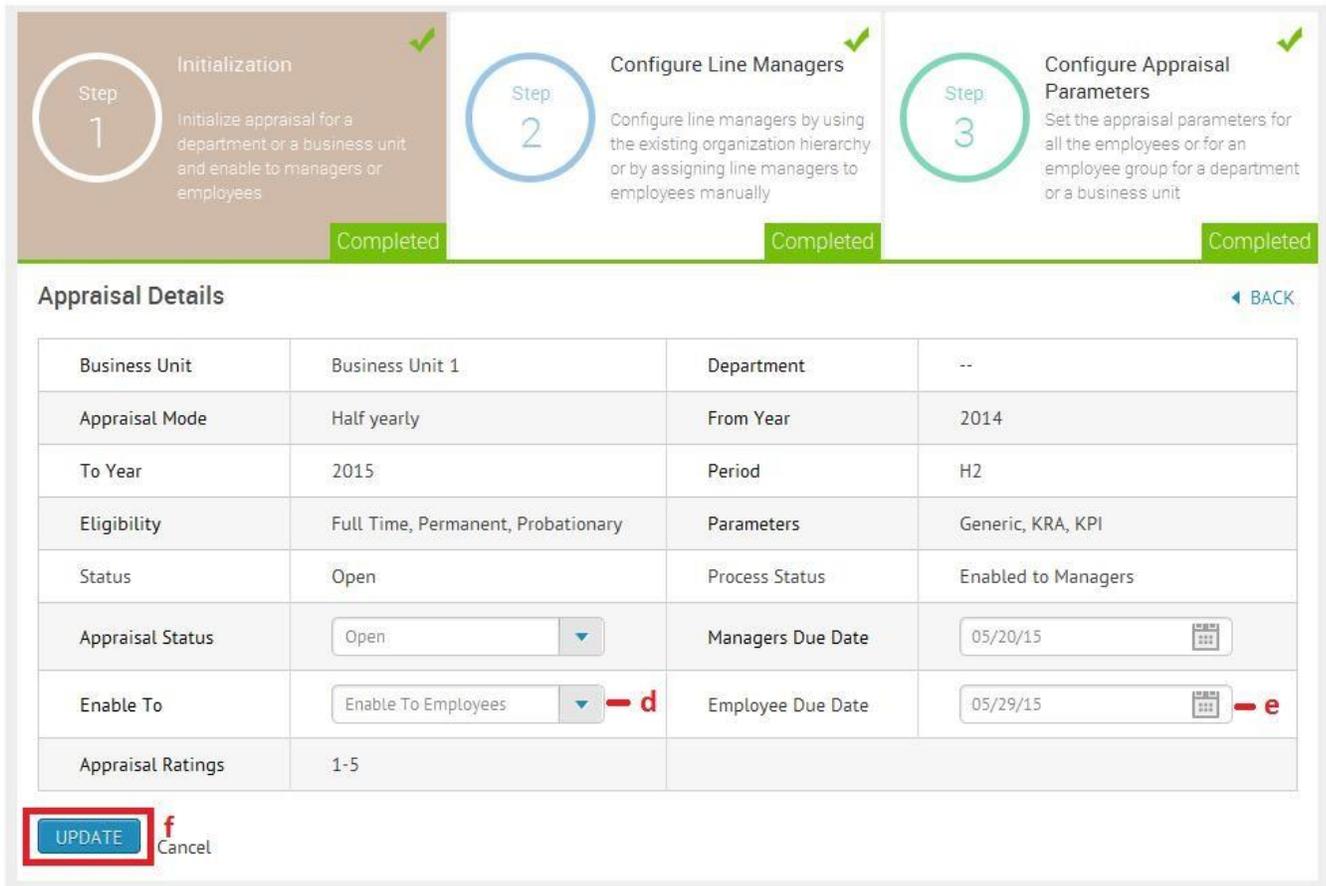
Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
C	GlobalSolutions	SoftSolutions	2015-2015	Quarterly	Q1	Open	In progress
	Orange Blossom	InformationTechnology	2015-2015	Quarterly	Q1	Open	Enabled to Mana

Records per page: 20

Figure 227

- a. Click **Appraisals** in the top menu
- b. Click **Initialize Appraisal** on the left menu panel
- c. Click **Edit** icon against an appraisal process

Please refer Figure 228



The screenshot shows a three-step process flow for configuring appraisals. All steps are marked as 'Completed' with green checkmarks:

- Step 1: Initialization** - Initialize appraisal for a department or a business unit and enable to managers or employees.
- Step 2: Configure Line Managers** - Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually.
- Step 3: Configure Appraisal Parameters** - Set the appraisal parameters for all the employees or for an employee group for a department or a business unit.

Below the steps is the **Appraisal Details** form:

Business Unit	Business Unit 1	Department	--
Appraisal Mode	Half yearly	From Year	2014
To Year	2015	Period	H2
Eligibility	Full Time, Permanent, Probationary	Parameters	Generic, KRA, KPI
Status	Open	Process Status	Enabled to Managers
Appraisal Status	Open	Managers Due Date	05/20/15
Enable To	Enable To Employees <b>- d</b>	Employee Due Date	05/29/15 <b>- e</b>
Appraisal Ratings	1-5		

At the bottom left, there is an **UPDATE** button (highlighted with a red box) and a **Cancel** button.

Figure 229

- d. Select **'Enable to Employees'** in the Enable To dropdown
- e. Select a date as the Employee Due Date
- f. Click **UPDATE** button to enable the appraisal process to Employees

## 16.9 How do I view a Manager's Status?

You (Management/HR) can view the Manager's appraisal status.

Please refer Figure 230

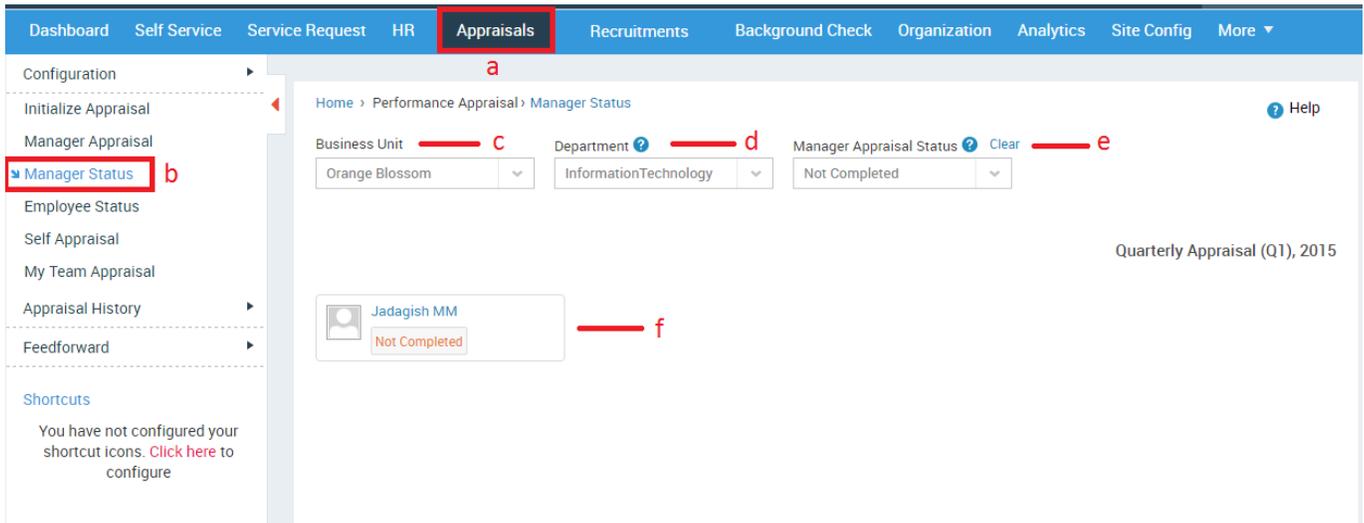


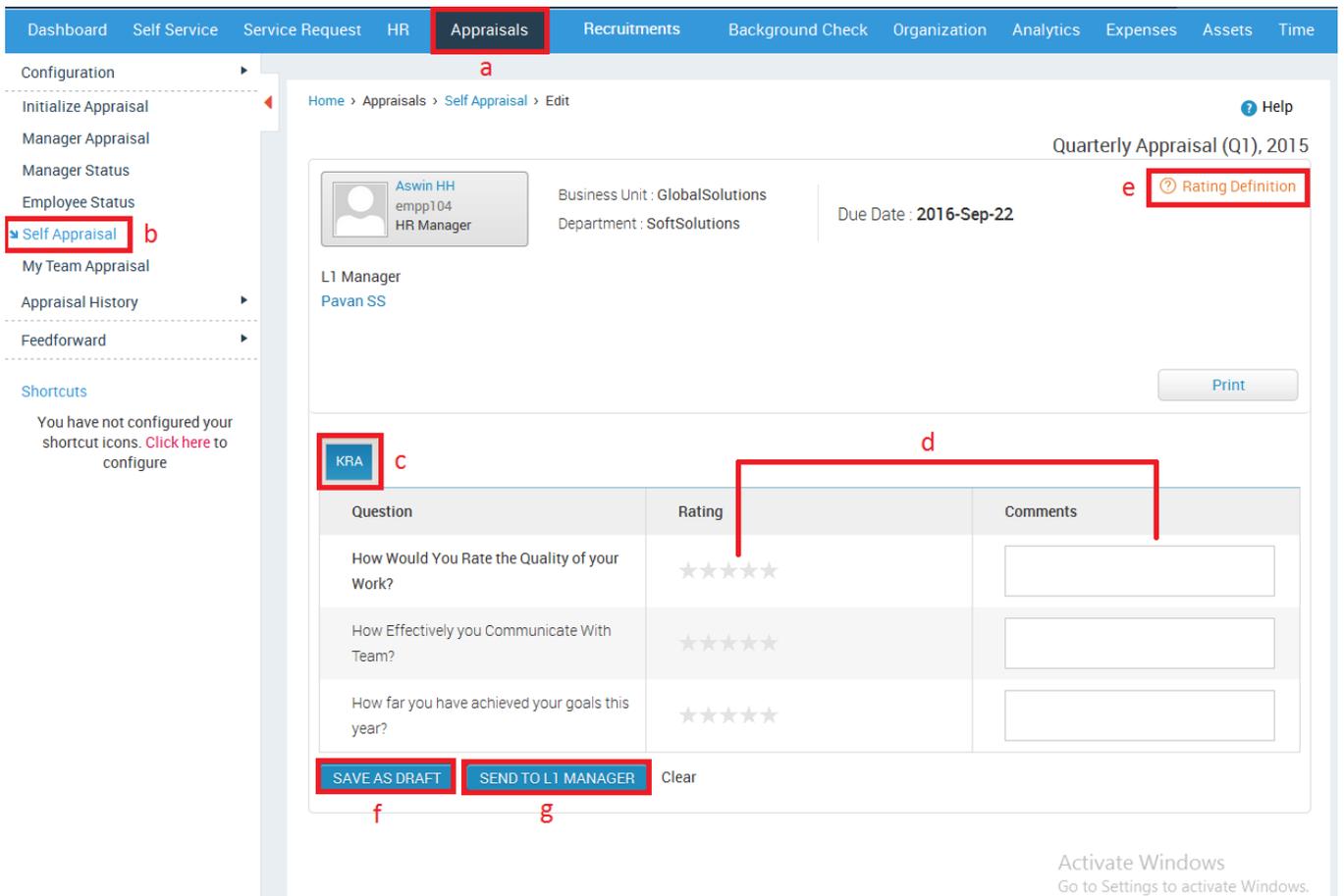
Figure 230

- a. Click **Appraisals** in the top menu
- b. Click **Manager Status** on the left menu panel
- c. Select the Business Unit
- d. Select the Department
- e. Select the Manager Appraisal Status if required
- f. Managers and their status will be displayed

## 16.10 How do I provide Self Appraisal?

You can provide self-appraisal details such as ratings and comments. Upon completion of self-appraisal, your appraisal details will be visible to your line Managers for further ratings and comments.

Please refer Figure 231



Dashboard Self Service Service Request HR **Appraisals** Recruitments Background Check Organization Analytics Expenses Assets Time

Configuration  
 Initialize Appraisal  
 Manager Appraisal  
 Manager Status  
 Employee Status  
**Self Appraisal** b  
 My Team Appraisal  
 Appraisal History  
 Feedforward

Shortcuts  
 You have not configured your shortcut icons. [Click here](#) to configure

Home > Appraisals > Self Appraisal > Edit

Help  
 Quarterly Appraisal (Q1), 2015  
 Rating Definition e

Aswin HH  
 emp104  
 HR Manager  
 Business Unit : GlobalSolutions  
 Department : SoftSolutions  
 Due Date : 2016-Sep-22

L1 Manager  
 Pavan SS

Print

KRA c

Question	Rating	Comments
How Would You Rate the Quality of your Work?	★★★★★	<input type="text"/>
How Effectively you Communicate With Team?	★★★★★	<input type="text"/>
How far you have achieved your goals this year?	★★★★★	<input type="text"/>

SAVE AS DRAFT f SEND TO L1 MANAGER g Clear

Activate Windows  
 Go to Settings to activate Windows.

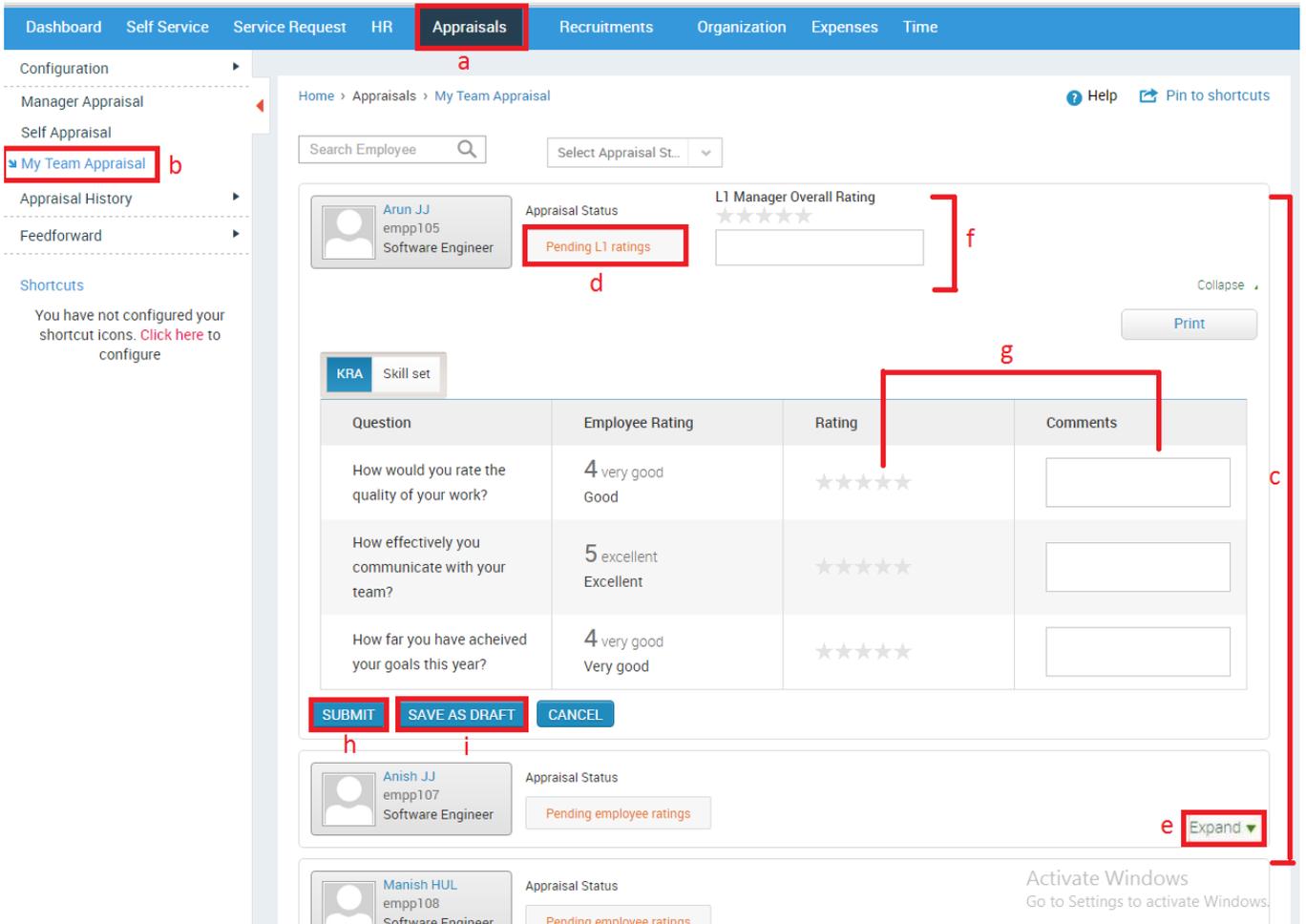
Figure 231

- Click **Appraisals** in the top menu
- Click **Self-Appraisal** on the left menu panel
- The parameters are displayed above the questions grid
- Provide rating and comments for every question
- Click **Rating Definition** option to view the text for each rating
- Click **SEND TO L1 MANAGER** button to send the self-appraisal details it to L1 Manager
- Click **SAVE AS DRAFT** button to only save the appraisal process

## 16.11 How do I provide appraisal ratings and comments for an Employee?

You (L1 Manager) will be able to view your team Employees' appraisal status. Once the Employees complete their appraisal process, you will be able to provide ratings and comments to the Employees. Based on the levels of appraisal, the Employee appraisal process will be enabled to the Line Managers.

Please refer Figure 232



The screenshot shows the 'My Team Appraisal' page in the Sentrifugo HRMS. The top navigation bar includes 'Appraisals' (labeled 'a'). The left sidebar has 'My Team Appraisal' selected (labeled 'b'). The main content area shows a list of employees. The first employee, Arun JJ (emp105), has a 'Pending L1 ratings' status (labeled 'd'). To the right, there is a section for 'L1 Manager Overall Rating' (labeled 'f') with a star rating and a 'Print' button. Below this is a table for providing ratings and comments for specific questions (labeled 'g'). The table has columns for 'Question', 'Employee Rating', 'Rating', and 'Comments'. The first row shows a question about the quality of work, with an employee rating of 4 (very good) and a manager rating of 5 stars. The second row shows a question about communication, with an employee rating of 5 (excellent) and a manager rating of 5 stars. The third row shows a question about goal achievement, with an employee rating of 4 (very good) and a manager rating of 5 stars. Below the table are buttons for 'SUBMIT' (labeled 'h'), 'SAVE AS DRAFT' (labeled 'i'), and 'CANCEL'. At the bottom, there are sections for other employees, Anish JJ (emp107) and Manish HUL (emp108), both with 'Pending employee ratings' status. An 'Expand' button (labeled 'e') is visible next to the second employee's section. A 'Collapse' button is also present. The page also includes a search bar, a 'Select Appraisal St...' dropdown, and a 'Help' button.

Figure 232

- a. Click **Appraisals** in the top menu
- b. Click **My Team Appraisal** on the left menu panel
- c. All the Employees in the Manager's team will be displayed
- d. The status of each Employee's appraisal is displayed
- e. Click **Expand** option to provide Manager's rating
- f. Provide overall rating and comment for an Employee
- g. Provide the rating and comments for each question
- h. Click **SUBMIT** button
- i. Click **SAVE AS DRAFT** button to save the ratings and comments without submitting. This option will allow you to make changes to your ratings and comments later.

## 16.12 How do I check Employee Status?

You (Management/HR) can view the Employees' appraisal status.

Please refer Figure 30

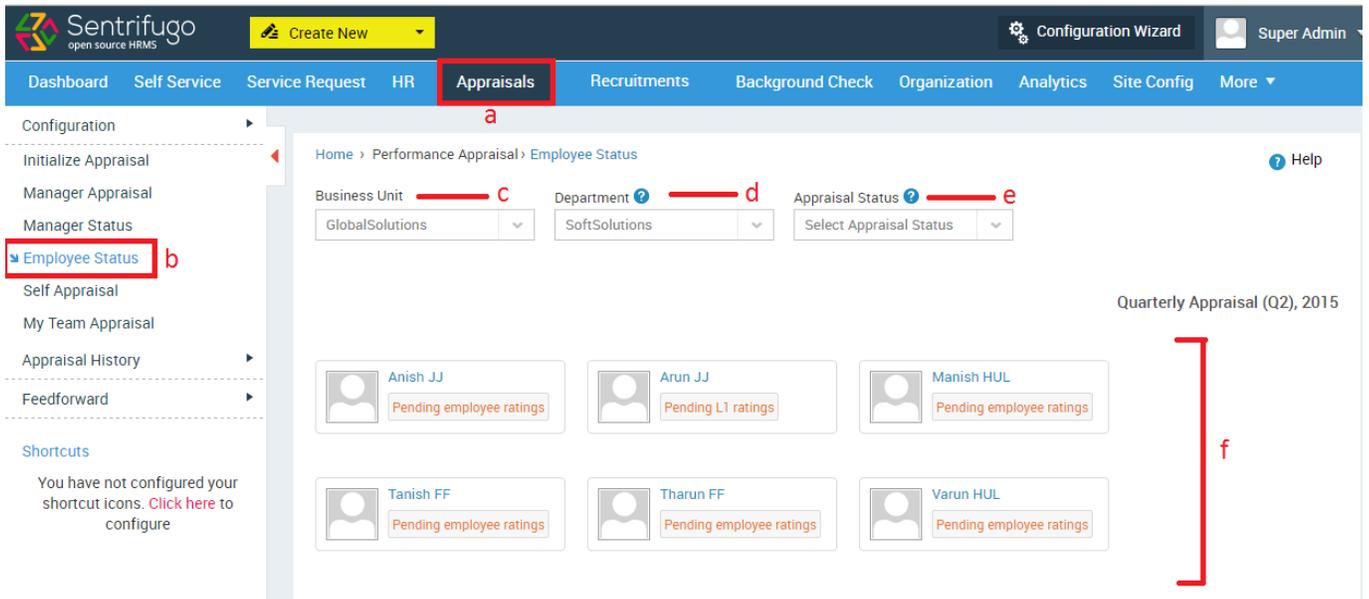


Figure 233

- a. Click **Appraisals** in the top menu
- b. Click **Employee Status** on the left menu panel
- c. Select the Business Unit
- d. Select the Department
- e. Select Appraisal Status if required
- f. Employees and their appraisal statuses will be displayed

## 16.13 What is Feedforward?

Feedforward is the feedback given by the Employees to appraise their respective Line Managers. All the configurations are done on the Management level. Only the Management can view the feedback given by the Employees about their Managers.

## 16.14 How do I add Questions for Feedforward?

Questions are added by the Management to evaluate Managers' performance.

Please refer Figure 234

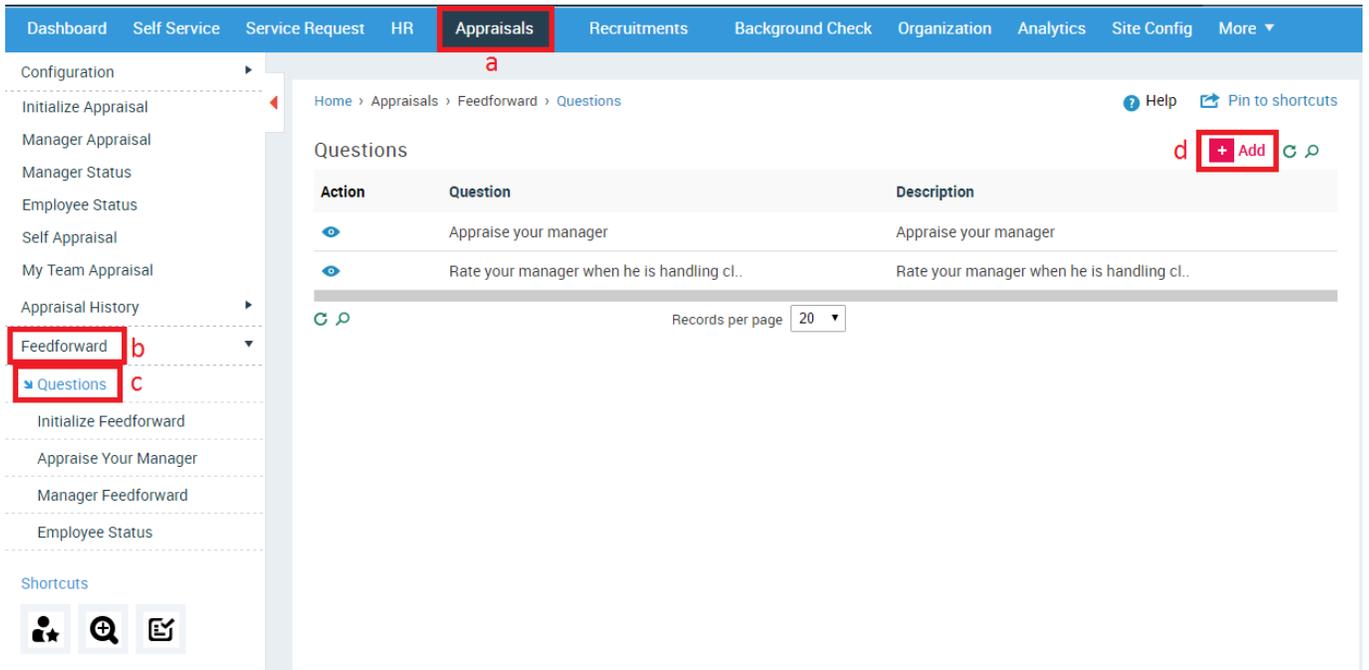


Figure 234

- a. Click **Appraisals** in the top menu
- b. Click **Feedforward** on the left menu panel
- c. Click **Questions** in the submenu
- d. Click **+Add** button

Please refer Figure 235

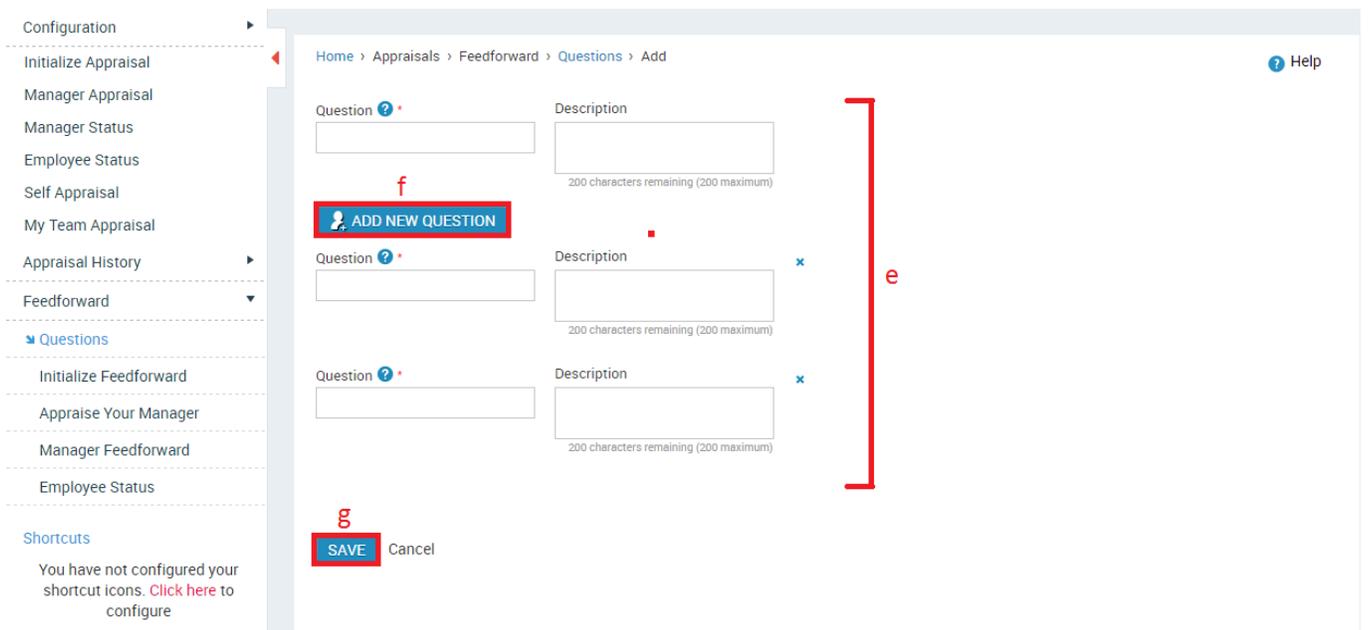


Figure 236

- e. Add the question and description if required
- f. Click **ADD NEW QUESTION** button to add more questions
- g. Click **SAVE** button

## 16.15 How do I initialize Feedforward?

- In the initialize feed forward page, only the appraisals which have 'Closed' status are displayed.
- **Employee Details:** Here, the Management will determine if the management can view only the feedback given by the Employees or the feedback along with the Employee names.
  - **Show:** Employee names and their feedbacks will be displayed
  - **Hide:** Only the feedback information will be displayed.
- **Enable to:** The Management will determine if all Employees can appraise their Managers or only the Employees eligible for appraisal
  - **Appraisal Employees:** All the Employees eligible for appraisal process can appraise their Managers
  - **All Employees:** All the Employees in the organization can appraise their Managers
- **Due Date:** The due date is for closing the Feed Forward process for Employees
- **Configure Questions:** All the questions added by the Management will be displayed. If more questions are to be added, **Add New Question** option is also provided.

Please refer Figure 237

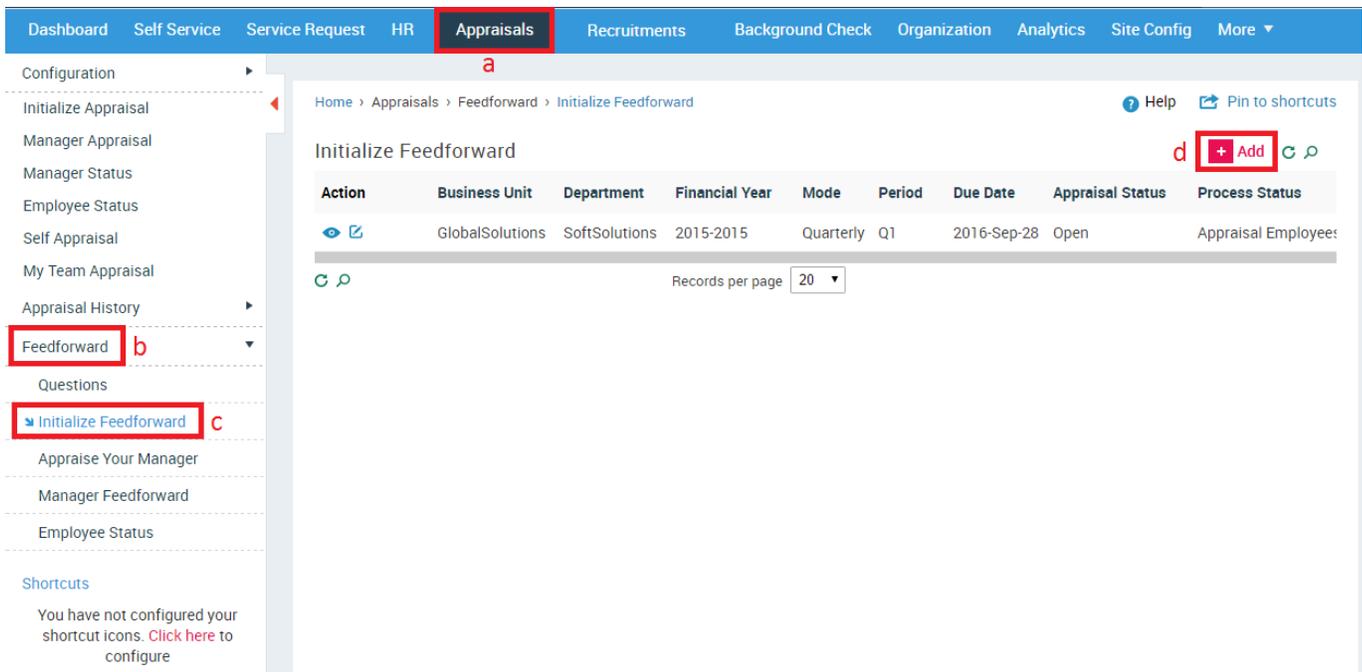


Figure 237

- a. Click **Appraisals** in the top menu
- b. Click **Feedforward** on the left menu panel
- c. Click **Initialize Feedforward** in the submenu
- d. Click **+Add** button

Please refer Figure 238

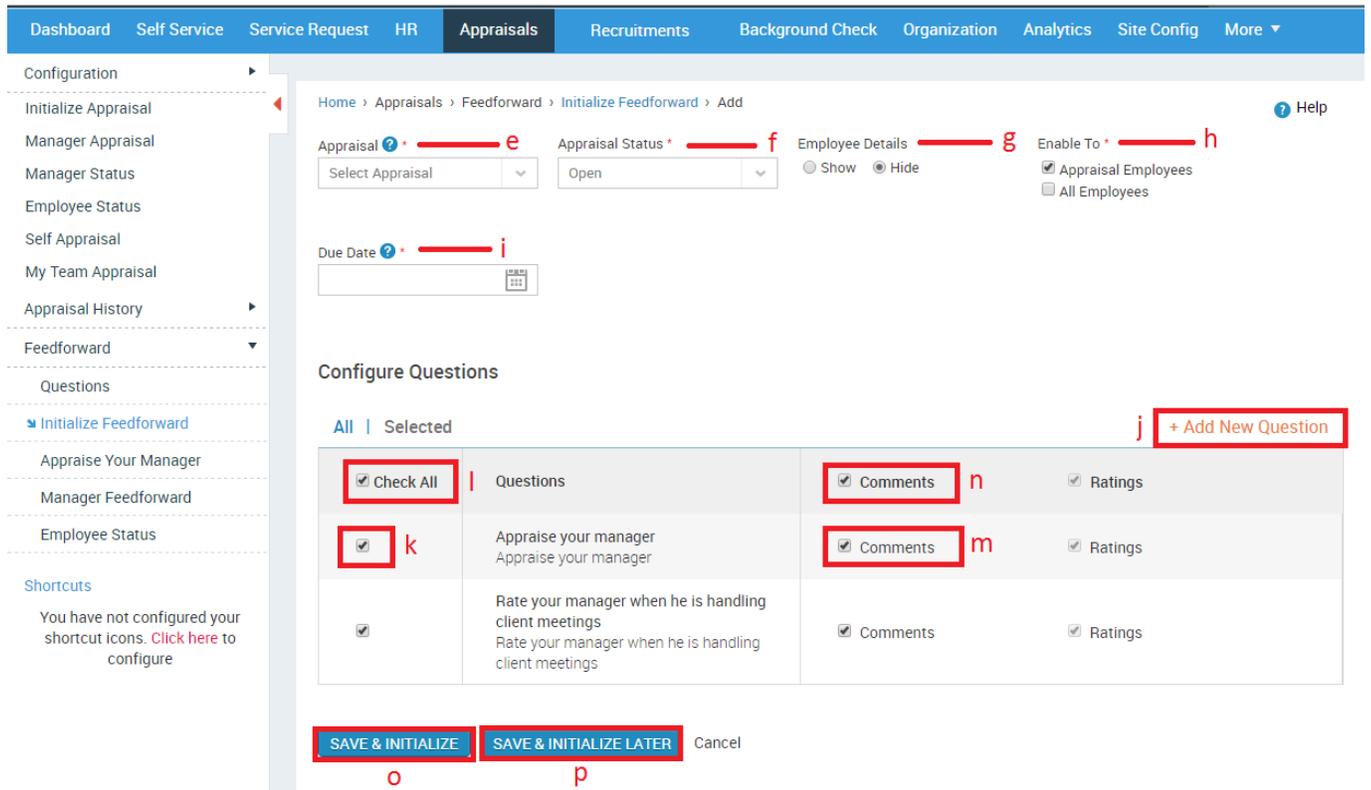


Figure 238

- e. Select an appraisal process from the Appraisal dropdown
- f. The Status will be to 'Open' by default
- g. Select whether you want to view the Employee details along with their feedback ratings and comments or have the Employee details hidden
- h. Enable Feedforward to all Employees or only to Employees who are eligible for Appraisal process
- i. Select a due date for Employees to provide their feedback
- j. Click **Add New Question** to add new questions for Feedforward
- k. Select Questions individually

Or

- l. Select all the questions
- m. Select comments individually for all the questions

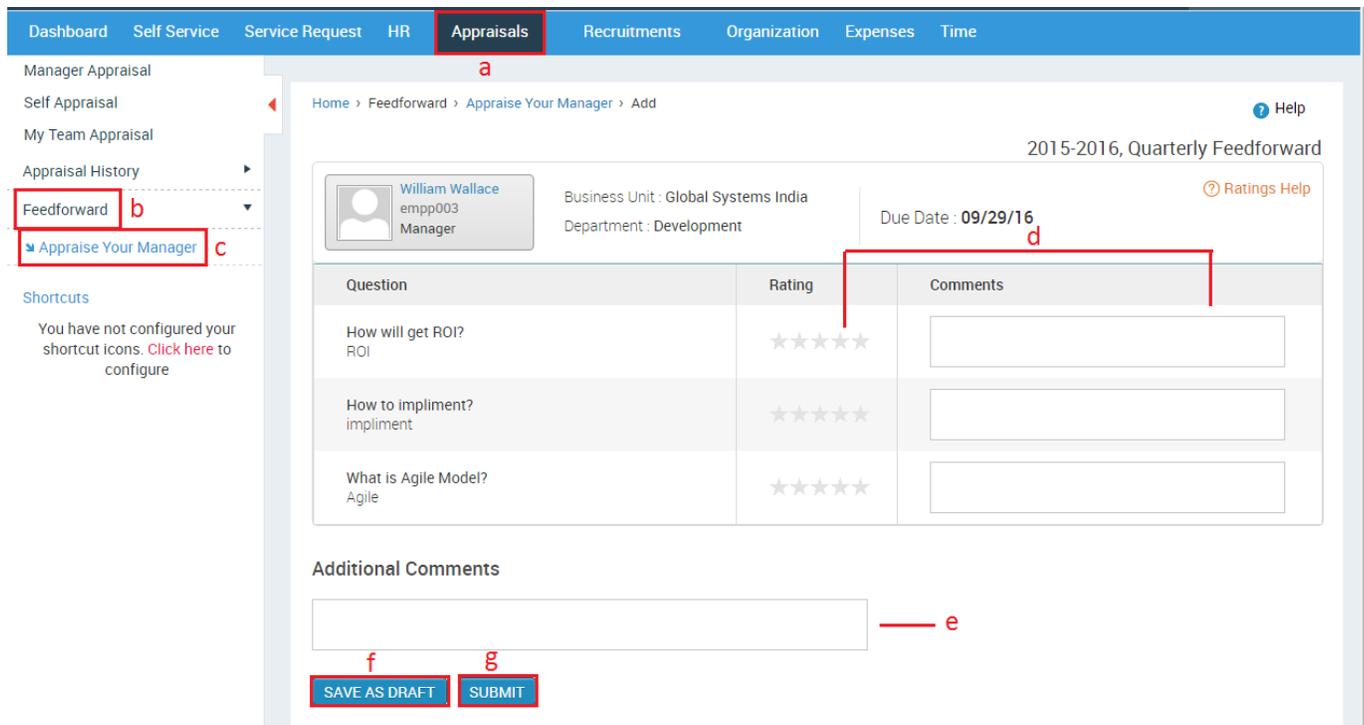
Or

- n. Select comments for all questions
- o. Click **SAVE & INITIALIZE** button to initialize the Feed Forward process
- p. Click on **SAVE & INITIALIZE LATER** button to only save the Feed Forward process

## 16.16 How do I Appraise my Manager?

You will be able to view the questions defined to appraise your Line Managers. You can provide ratings and comments for each question and submit the feedforward.

Please refer Figure 239



The screenshot shows the 'Appraisals' section of the Sentrifugo HRMS. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. The left sidebar has 'Manager Appraisal', 'Self Appraisal', 'My Team Appraisal', 'Appraisal History', 'Feedforward', and 'Appraise Your Manager'. The main content area is titled '2015-2016, Quarterly Feedforward' and shows a form for 'William Wallace' (Manager) with a due date of '09/29/16'. The form contains a table with three questions: 'How will get ROI?', 'How to impliment?', and 'What is Agile Model?'. Each question has a 5-star rating field and a comments text area. Below the table is an 'Additional Comments' field and two buttons: 'SAVE AS DRAFT' and 'SUBMIT'.

Figure 240

- Click **Appraisals** in the top menu
- Click **Feedforward** on the left menu panel
- Click **Appraise Your Manager** in the submenu
- Provide ratings and comments
- Enter additional comments (not mandatory)
- Click **SAVE AS DRAFT** button to make changes later
- Click **SUBMIT** button

## 16.17 How do I view Managers' Feedforward details?

You (Management) will be able to view Managers feedforward details. Upon selection of appraisal from the dropdown, feed forward details along with the Manager ratings are displayed. The average ratings of all the Employees will be highlighted. A detailed description of comments and ratings of Employees are displayed by question or by Employee.

Please refer Figure 241

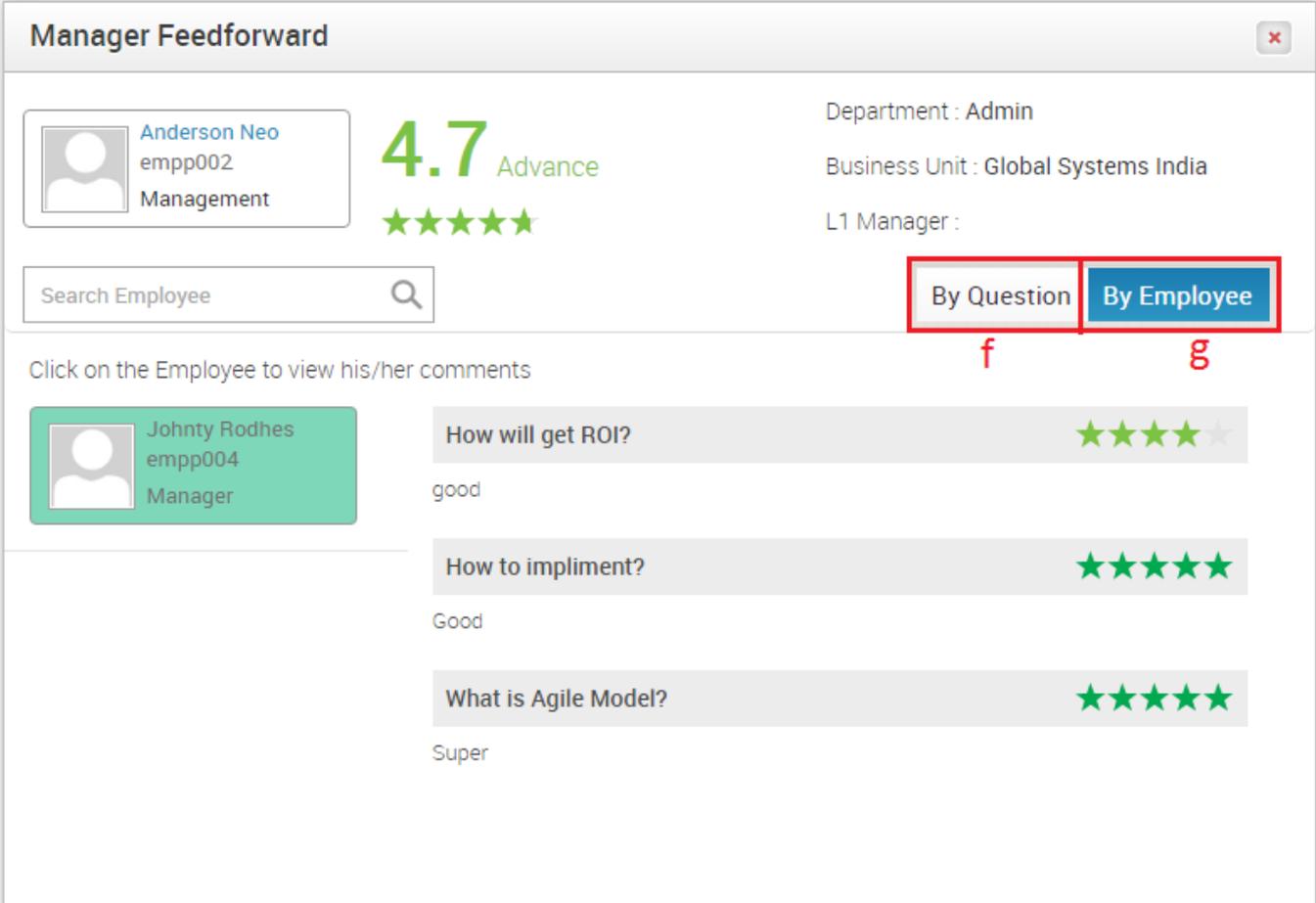
The screenshot displays the Sentrifugo HRMS interface. At the top, a blue navigation bar contains various menu items, with 'Appraisals' highlighted in red and labeled 'a'. On the left, a sidebar menu lists various appraisal-related options, with 'Feedforward' (labeled 'b') and 'Manager Feedforward' (labeled 'c') highlighted in red. The main content area shows the 'Feedforward' section for the '2015-2016 Quarterly(Q1) ...' process (labeled 'd'). Below this, a table titled 'Feedforward Details' provides information about the appraisal process. Further down, the 'Manager Ratings' section displays two manager profiles: Anderson Neo (Rating 4) and William Wallace (Rating 3), with the latter's profile highlighted in red and labeled 'e'.

Business Unit	Global Systems India	Department	Development
Mode	Quarterly	From Year	2015
To Year	2016	Period	Q1

Figure 241

- a. Click **Appraisals** in the top menu
- b. Click **Feedforward** on the left menu panel
- c. Click **Manager Feedforward** in the submenu
- d. Select an appraisal process to view the Feedforward details
- e. Click on individual Manager section to view the ratings and comments provided by Employees

Please refer Figure 242



**Manager Feedforward**

Anderson Neo  
emp002  
Management

**4.7** Advance  
★★★★★

Department : Admin  
Business Unit : Global Systems India  
L1 Manager :

Search Employee

By Question **f** By Employee **g**

Click on the Employee to view his/her comments

Johnty Rodhes  
emp004  
Manager

How will get ROI? ★★★★★  
good

How to impliment? ★★★★★  
Good

What is Agile Model? ★★★★★  
Super

Figure 243

The below options will only be available if you have selected **'Show'** for the option **Employee Details** during feedforward initialization.

- f. Select 'By Questions' to view the ratings and comments based on questions
- g. Select 'By Employee' to view the ratings and comments of each Employee

## 16.18 How do I view Employee Feedforward Status?

You (Management) will be able to view the feed forward status of all Employees.

Please refer Figure 244

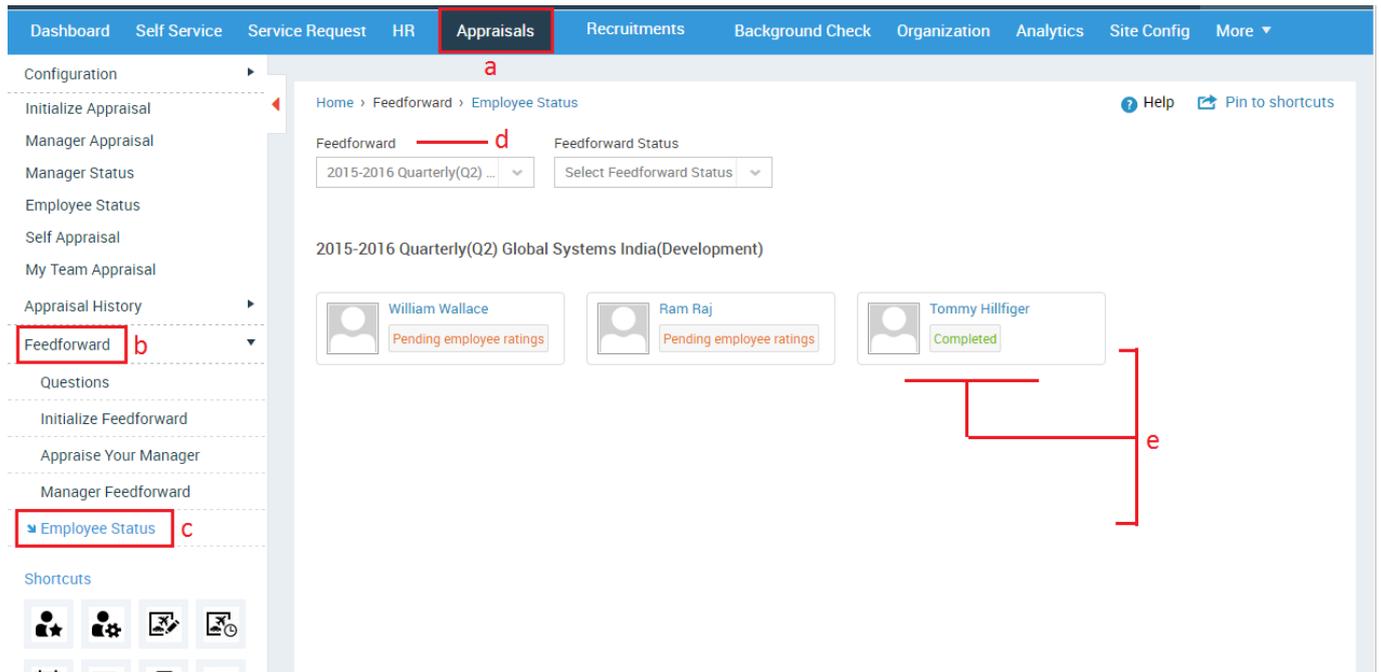


Figure 244

- a. Click **Appraisals** in the top menu
- b. Click **Feedforward** on the left menu panel
- c. Click **Employee Status** in the submenu
- d. Select a process to view Feedforward details in the dropdown
- e. The Employees of the selected process along with their Feed Forward status will be displayed

## 16.19 How do I view my Appraisal History?

Please refer Figure 245

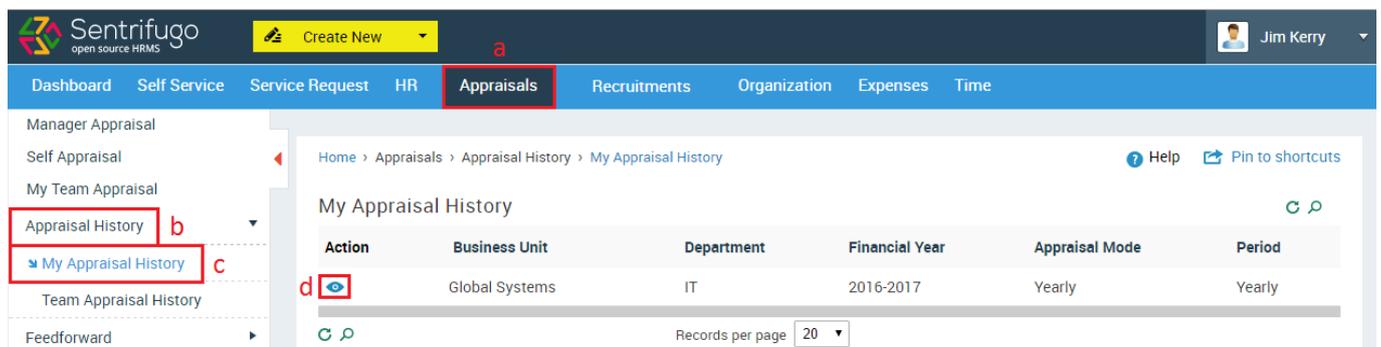
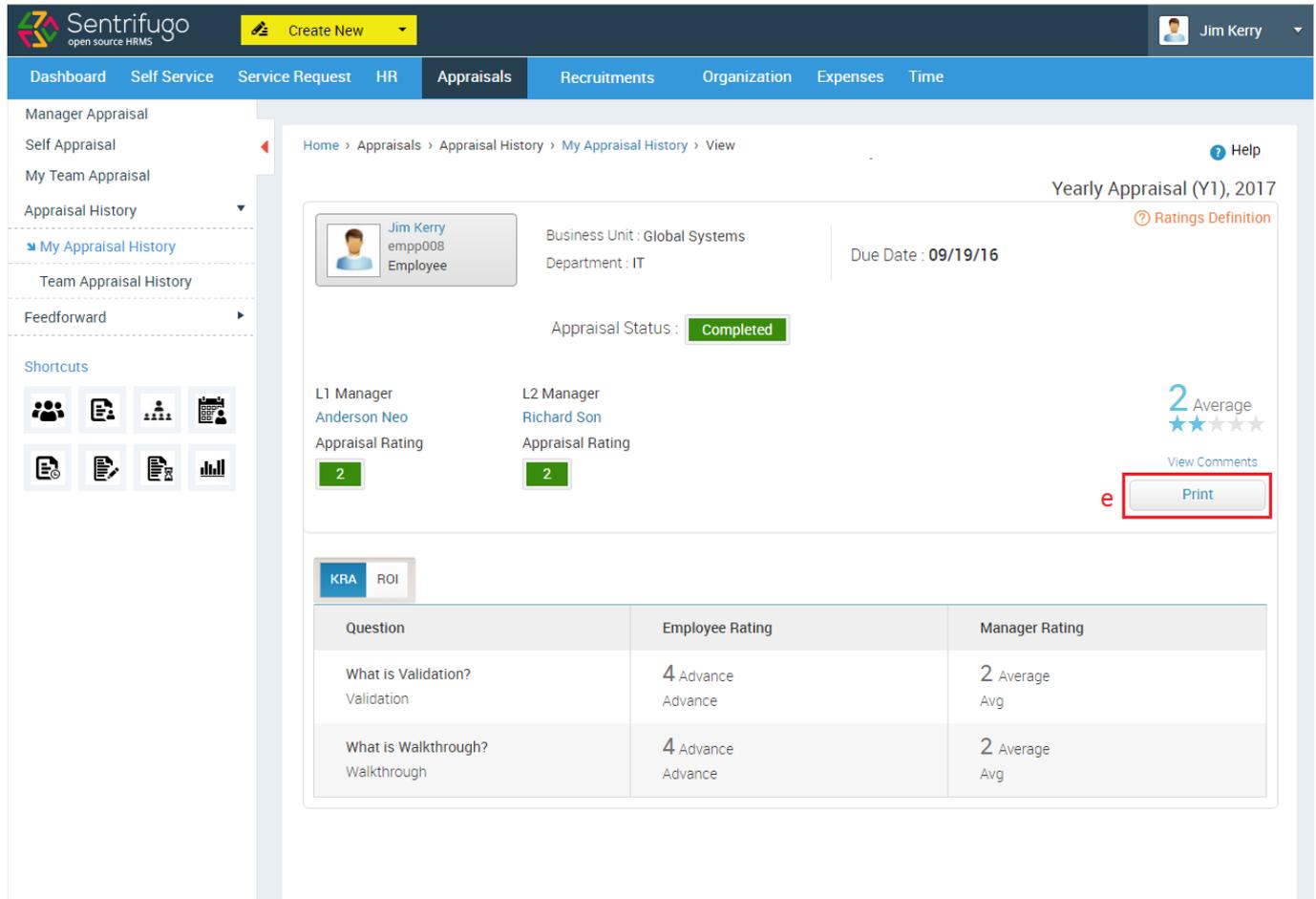


Figure 245

- a. Click **Appraisals** in the top menu
- b. Click **Appraisal History** on the left menu panel
- c. Click **My Appraisal History** in the submenu

d. Click **View** icon

Please refer Figure 246



Home > Appraisals > Appraisal History > My Appraisal History > View

Yearly Appraisal (Y1), 2017

Jim Kerry  
empp008  
Employee

Business Unit : Global Systems  
Department : IT

Due Date : 09/19/16

Appraisal Status : **Completed**

L1 Manager  
Anderson Neo  
Appraisal Rating  
**2**

L2 Manager  
Richard Son  
Appraisal Rating  
**2**

2 Average  
★★★★☆  
View Comments

**e** [Print](#)

Question	Employee Rating	Manager Rating
What is Validation? Validation	4 Advance Advance	2 Average Avg
What is Walkthrough? Walkthrough	4 Advance Advance	2 Average Avg

Figure 246

You can view your closed appraisal details here.

e. Click **Print** button to print your appraisal details

## 16.20 How do I view my team's Appraisal History?

Please refer Figure 247

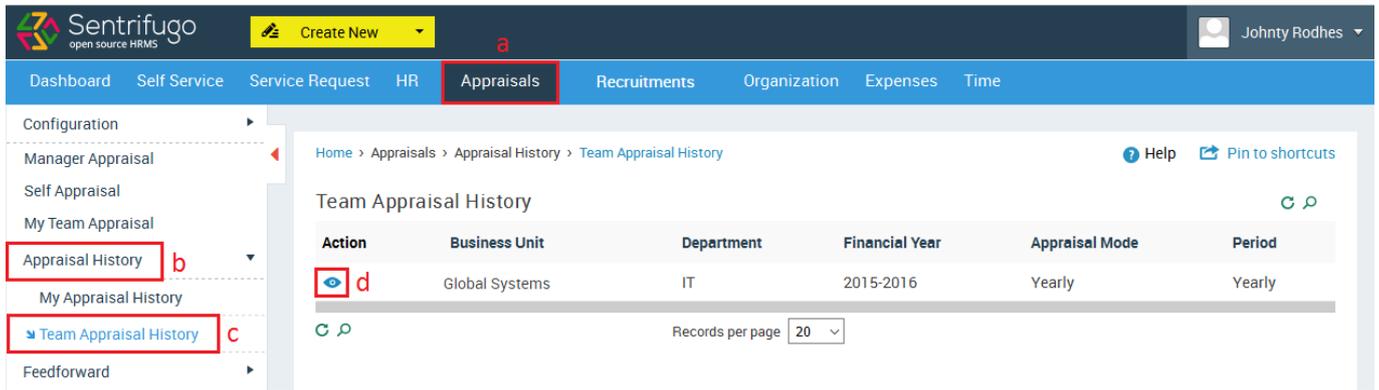


Figure 247

- a. Click **Appraisals** in the top menu
- b. Click **Appraisal History** on the left menu panel
- c. Click **Team Appraisal History** in the submenu
- d. Click **View** icon

Please refer Figure 248

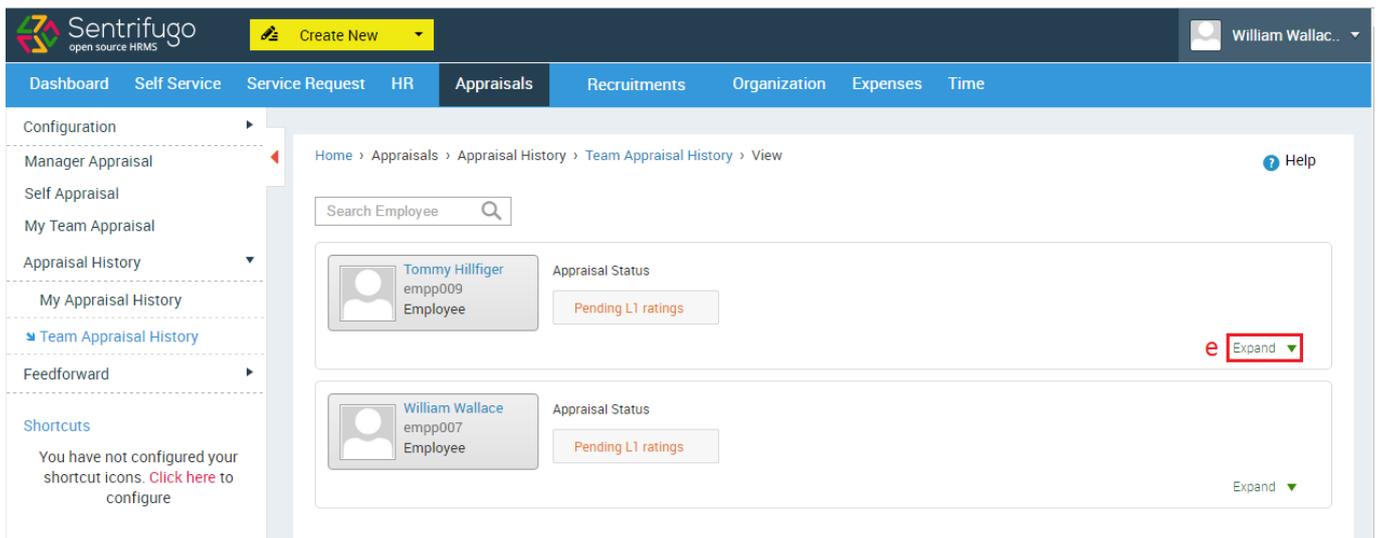
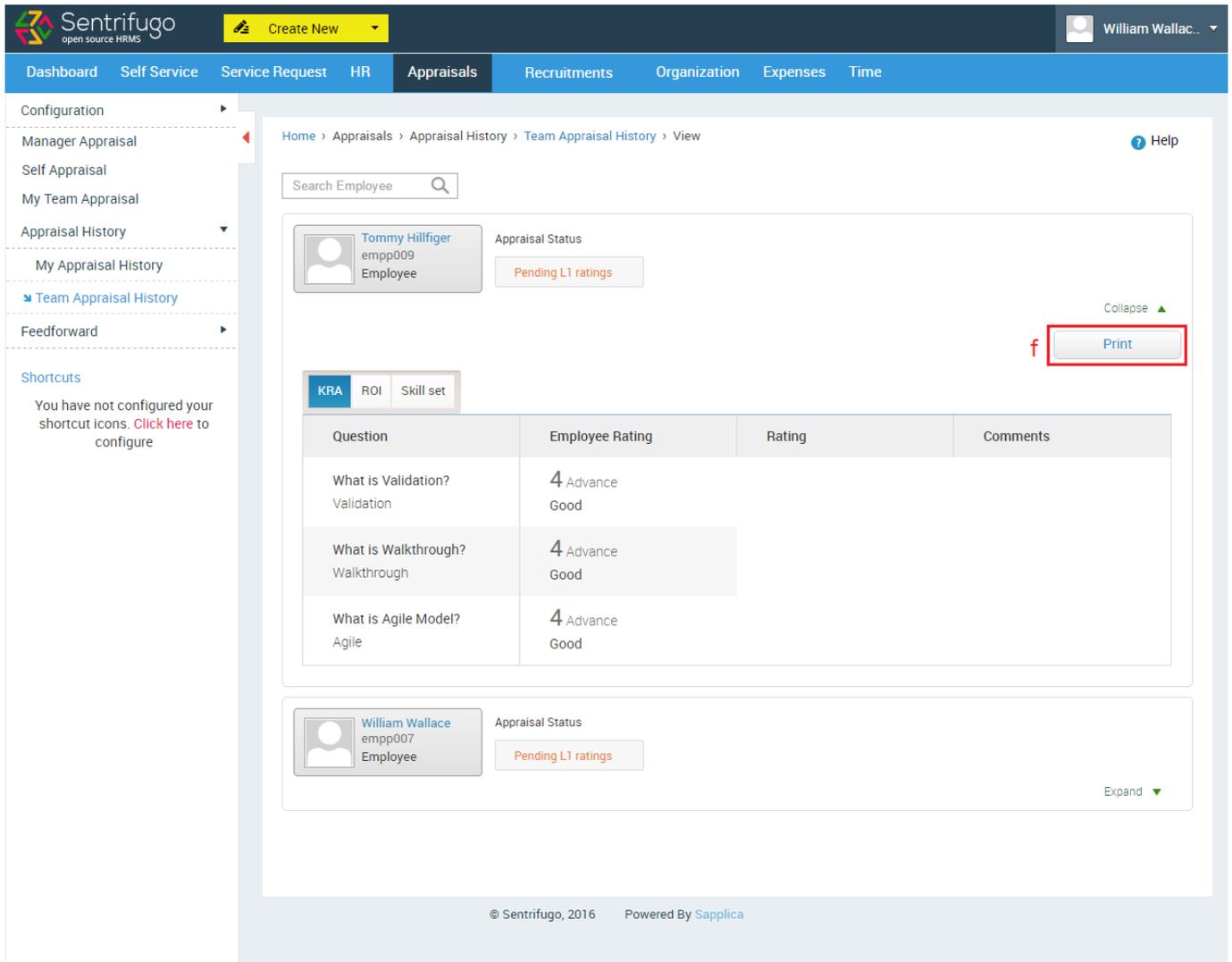


Figure 248

- e. Click **Expand** for any employee to view more details

Please refer Figure 249



Home > Appraisals > Appraisal History > Team Appraisal History > View

Search Employee

Tommy Hillfiger  
empp009  
Employee

Appraisal Status  
Pending L1 ratings

Collapse ▲

**f** Print

Question	Employee Rating	Rating	Comments
What is Validation? Validation	4 Advance Good		
What is Walkthrough? Walkthrough	4 Advance Good		
What is Agile Model? Agile	4 Advance Good		

William Wallace  
empp007  
Employee

Appraisal Status  
Pending L1 ratings

Expand ▼

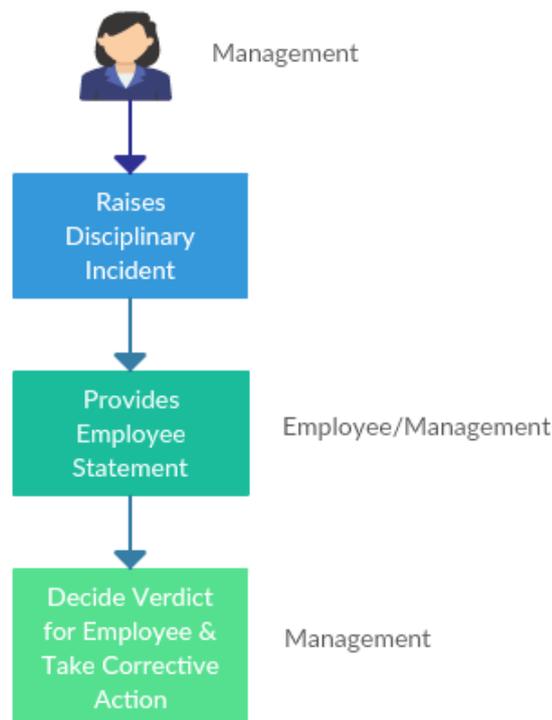
© Sentrifugo, 2016 Powered By Sapplica

Figure 249

- f. Click **Print** to print your employee's closed appraisal form

## 17. Disciplinary Incident Management

This module will enable users to follow a streamlined approach for disciplinary incident management process. Employers can raise disciplinary incident(s) against employees (defaulters) in the organization. The employees (defaulters) are given an opportunity to make an appeal by providing their statement. On the basis of the employee's (defaulter) statement and misdemeanour evidence, he/she can be pronounced guilty/no guilty. If found guilty, a corrective action can be taken.



### Process

- User raises a disciplinary incident against an employee
- Employee can provide his/her appeal statement
- If the employee does not provide his/her appeal statement within the expiry date, then he/she will not be able to provide the appeal statement. In that case the User (Management) can provide the statement on behalf of the employee
- The User (Management) will then decide the verdict for the employee (defaulter) and select a suitable corrective action

### Description:

(Management)

### 17.1 How do I create a Violation Type?



Only a Super Admin/Management can create a violation type.

Please refer Figure 250

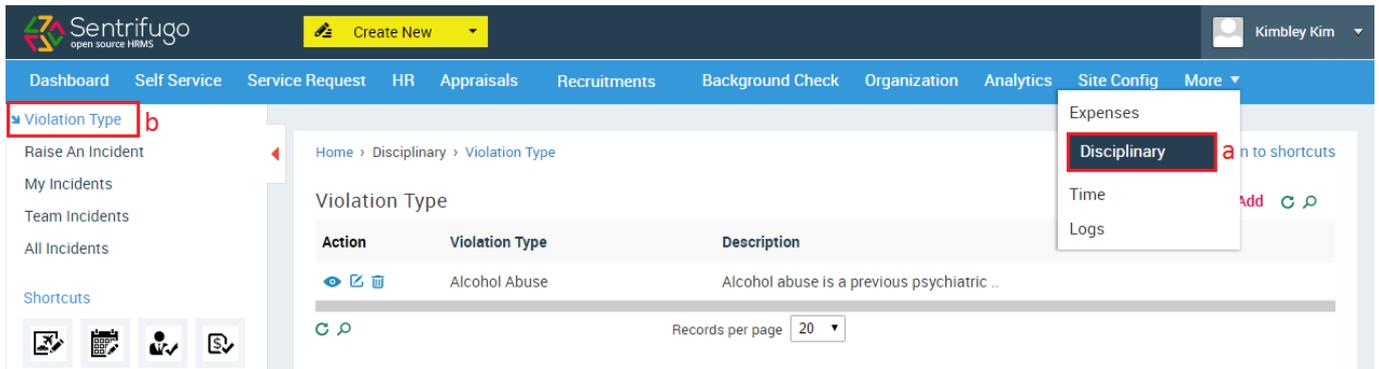


Figure 250

- Click **Disciplinary** in the top menu
- Click **Violation Type** on the left menu panel

Please refer Figure 251

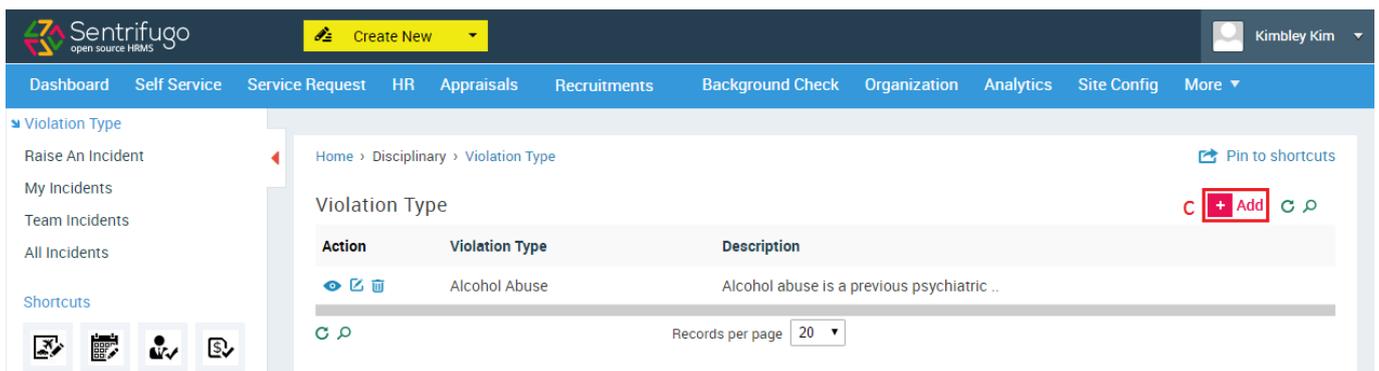


Figure 251

- Click **+Add** button on the grid's top right corner

Please refer Figure 252

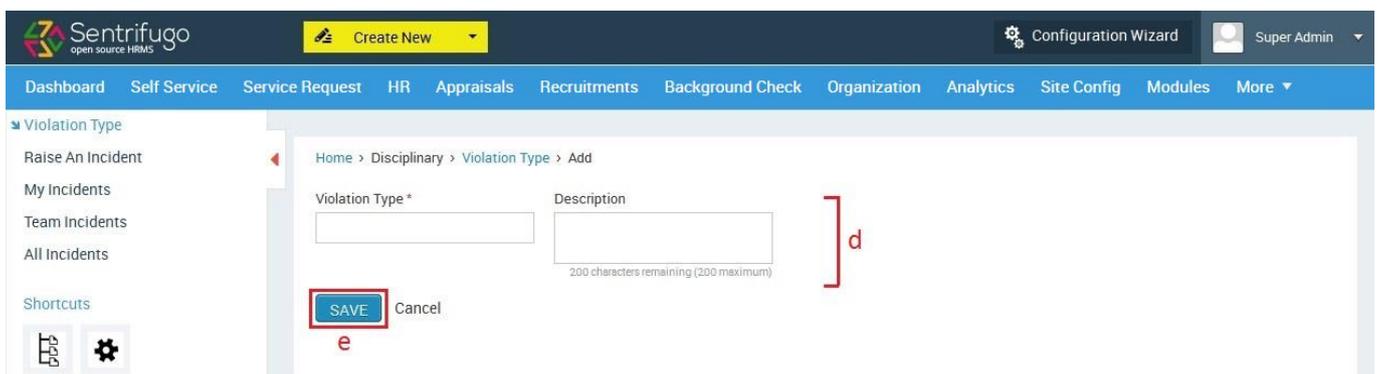


Figure 252

- d. Enter 'Violation Type' name and its description
- e. Click **SAVE** button

## 17.2 How do I raise a disciplinary incident?

Please refer Figure 253

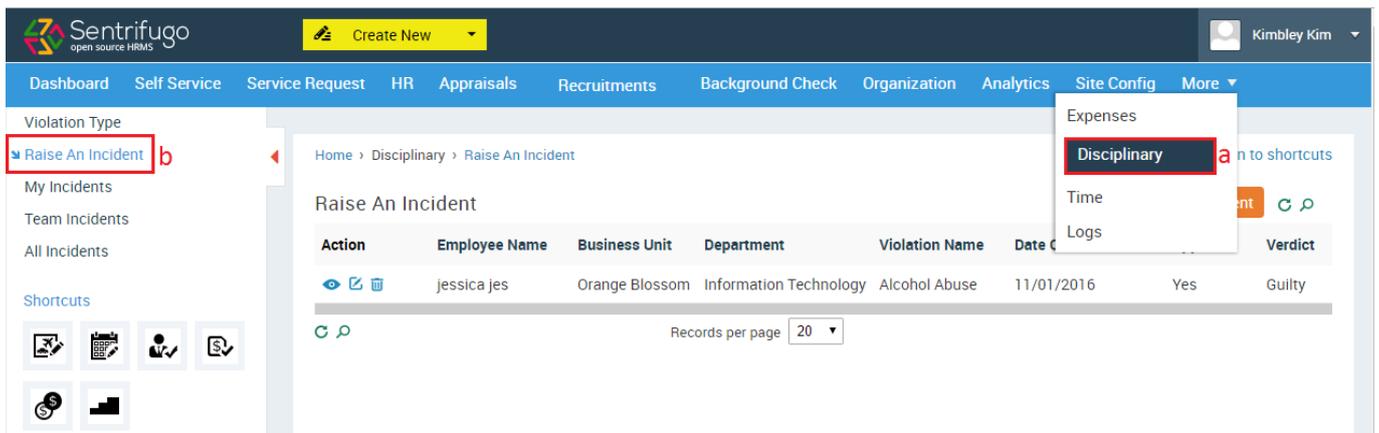


Figure 253

- a. Click **Disciplinary** in the top menu
- b. Click **Raise an Incident** on the left menu panel

Please refer Figure 254

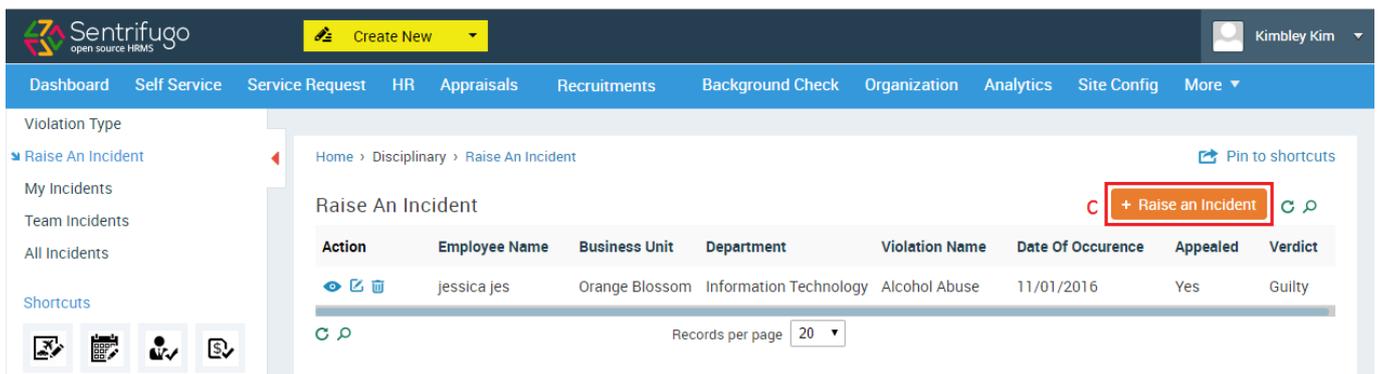
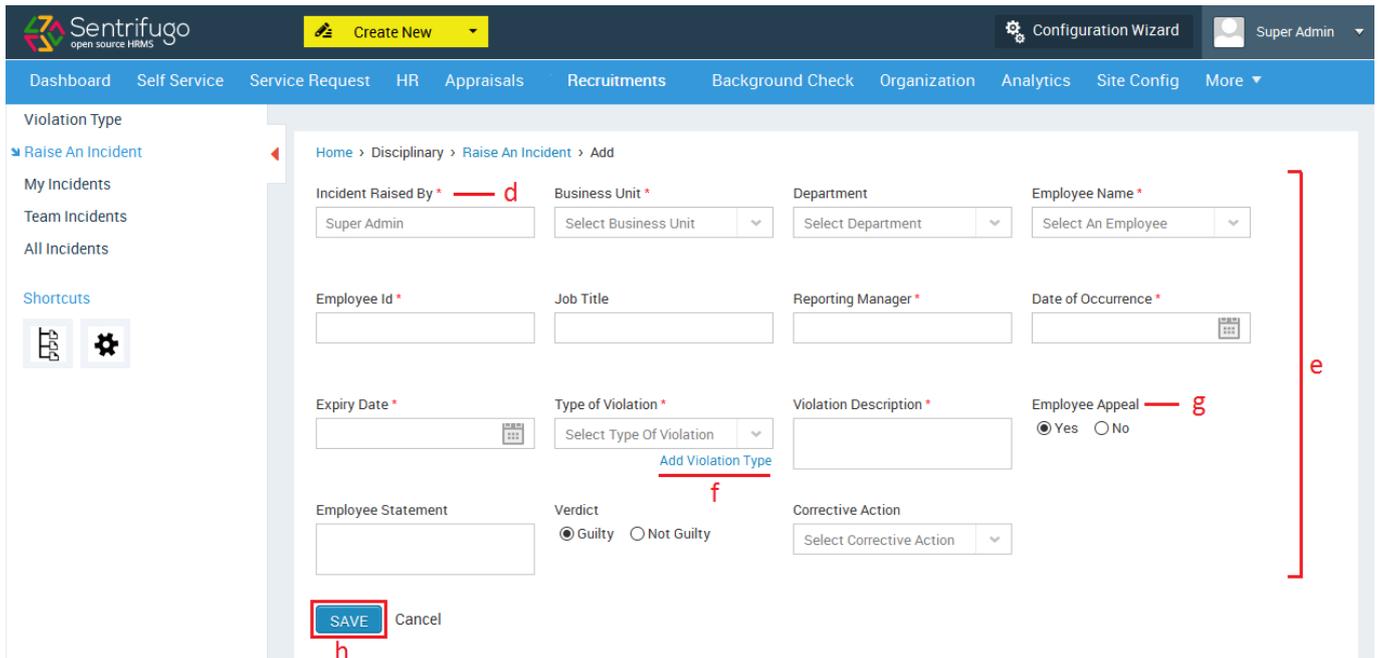


Figure 254

- c. Click **Raise an incident** button on the grid's top right corner

Please refer Figure 255



The screenshot shows the 'Add Incident' form in Sentrifugo. The form is titled 'Home > Disciplinary > Raise An Incident > Add'. It contains several input fields and dropdown menus. Annotations are as follows:

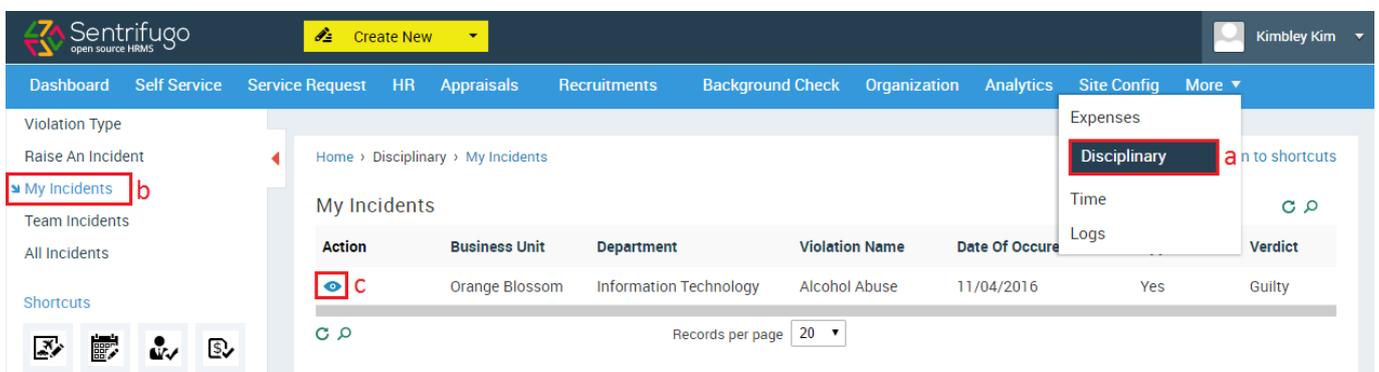
- d**: Points to the 'Incident Raised By' field, which is populated with 'Super Admin'.
- e**: A large bracket on the right side of the form, indicating the main form area.
- f**: Points to the 'Add Violation Type' link below the 'Type of Violation' dropdown.
- g**: Points to the 'Employee Appeal' radio buttons, with 'Yes' selected.
- h**: Points to the 'SAVE' button at the bottom left of the form.

Figure 255

- d. 'Incident Raised By' field will be auto populated
- e. Enter the required details
- f. Click **Add Violation Type** to add a new violation type
- g. Choose **Yes** to allow an employee appeal and **No** to disallow an employee appeal
- h. Click **SAVE** button

## 17.3 How do I view my disciplinary incidents?

Please refer Figure 256



The screenshot shows the 'My Incidents' page in Sentrifugo. The top navigation menu is open, and the 'Disciplinary' option is highlighted with a red box and labeled 'a'. In the left sidebar, 'My Incidents' is highlighted with a red box and labeled 'b'. In the main content area, a table lists incidents. The first row is highlighted with a red box and labeled 'c'.

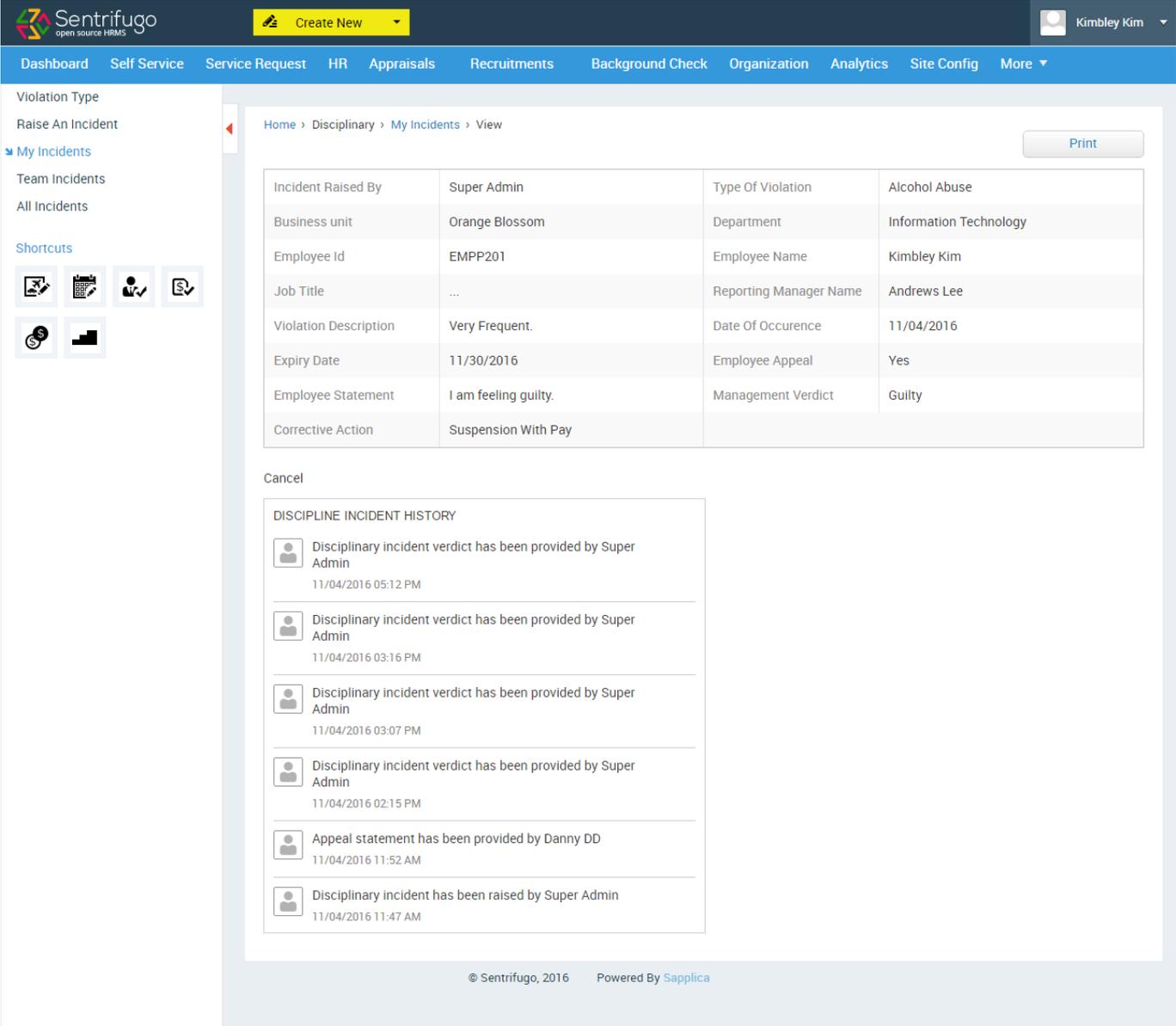
Action	Business Unit	Department	Violation Name	Date Of Occurrence	Employee Appeal	Verdict
	Orange Blossom	Information Technology	Alcohol Abuse	11/04/2016	Yes	Guilty

Figure 256

- a. Click **Disciplinary** in the top menu

- b. Click **My Incidents** on the left menu panel
- c. Click **View** icon in the Action column

Please refer Figure 257



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The user is logged in as 'Kimbley Kim'. The left sidebar shows 'My Incidents' selected under 'Violation Type'. The main content area displays the 'View' page for a disciplinary incident. Below the incident details is a 'Cancel' button and a 'DISCIPLINE INCIDENT HISTORY' section with a list of events.

Incident Raised By	Super Admin	Type Of Violation	Alcohol Abuse
Business unit	Orange Blossom	Department	Information Technology
Employee Id	EMPP201	Employee Name	Kimbley Kim
Job Title	...	Reporting Manager Name	Andrews Lee
Violation Description	Very Frequent.	Date Of Occurrence	11/04/2016
Expiry Date	11/30/2016	Employee Appeal	Yes
Employee Statement	I am feeling guilty.	Management Verdict	Guilty
Corrective Action	Suspension With Pay		

**DISCIPLINE INCIDENT HISTORY**

- Disciplinary incident verdict has been provided by Super Admin  
11/04/2016 05:12 PM
- Disciplinary incident verdict has been provided by Super Admin  
11/04/2016 03:16 PM
- Disciplinary incident verdict has been provided by Super Admin  
11/04/2016 03:07 PM
- Disciplinary incident verdict has been provided by Super Admin  
11/04/2016 02:15 PM
- Appeal statement has been provided by Danny DD  
11/04/2016 11:52 AM
- Disciplinary incident has been raised by Super Admin  
11/04/2016 11:47 AM

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Figure 257

## 17.4 How do I view my team members' (employees) disciplinary incidents?

Please refer Figure 258

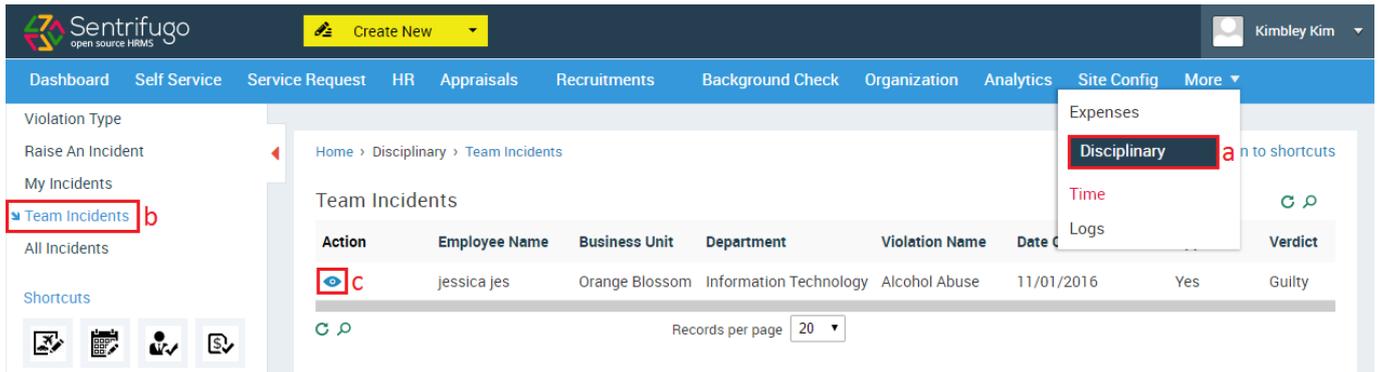


Figure 258

- a. Click **Disciplinary** in the top menu
- b. Click **Team Incidents** on the left menu panel
- c. Click **View** icon in the Action column

Please refer Figure 259

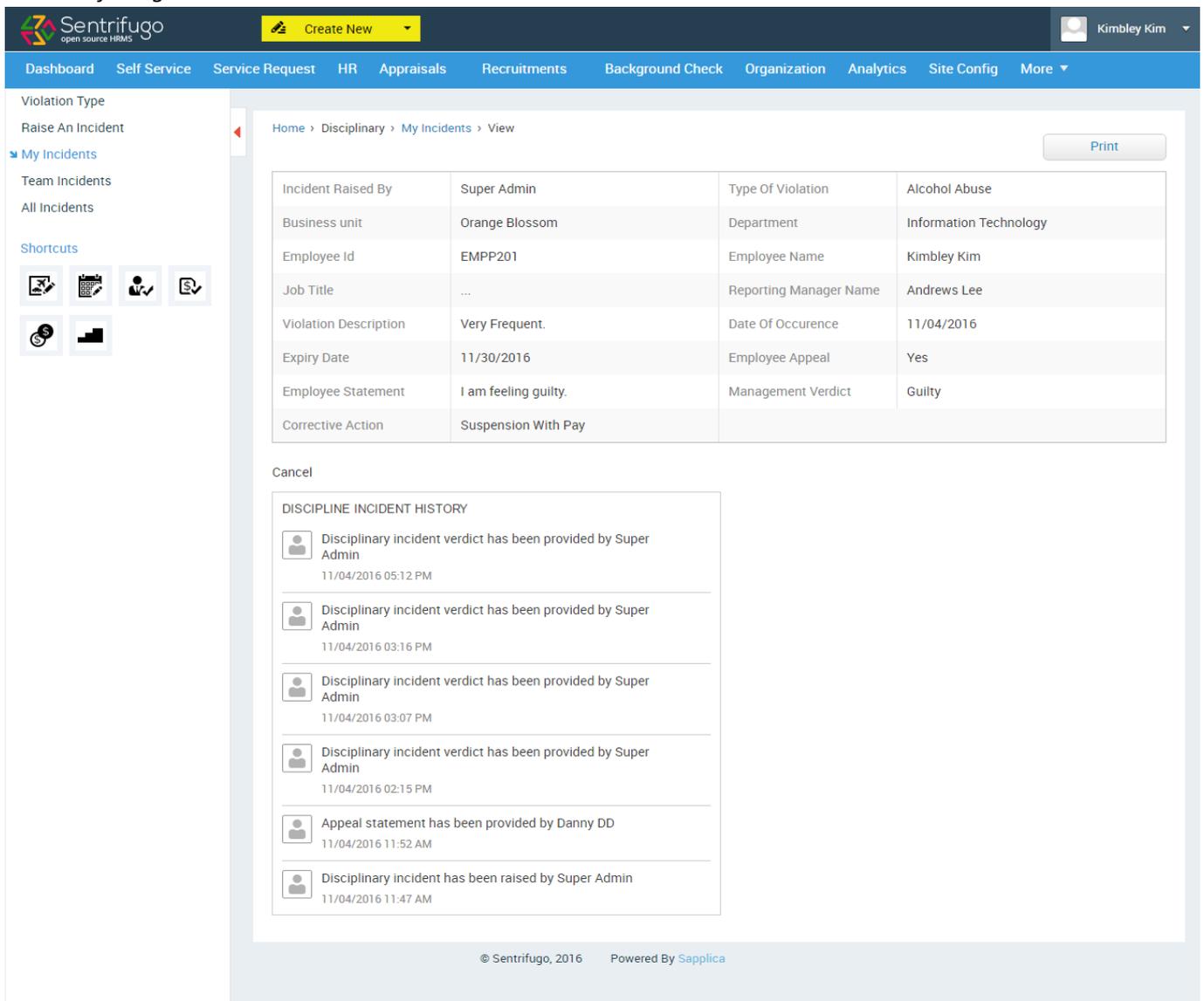


Figure 259

## 17.5 How do I provide my appeal statement?

Please refer Figure 260

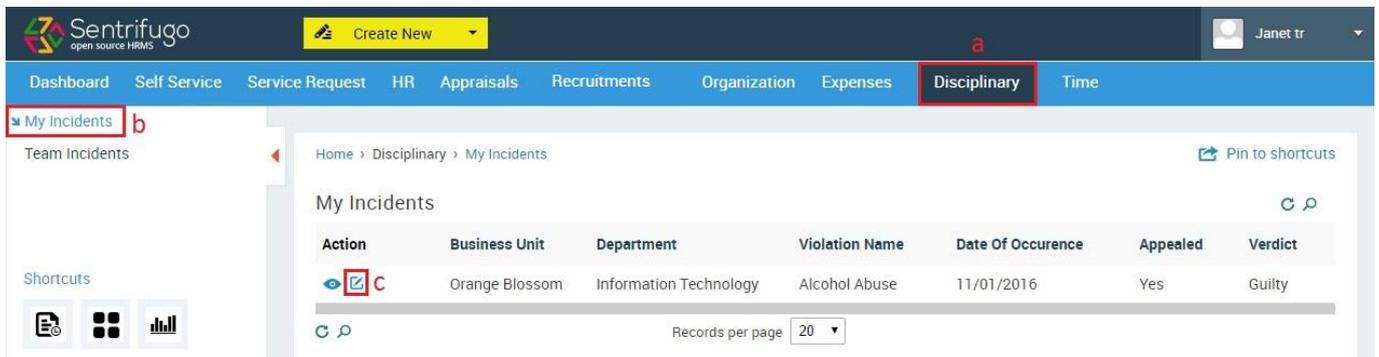


Figure 260

- Click **Disciplinary** in the top menu
- Click **My Incidents** on the left menu panel
- Click **edit** icon in the Action column

Please refer Figure 261

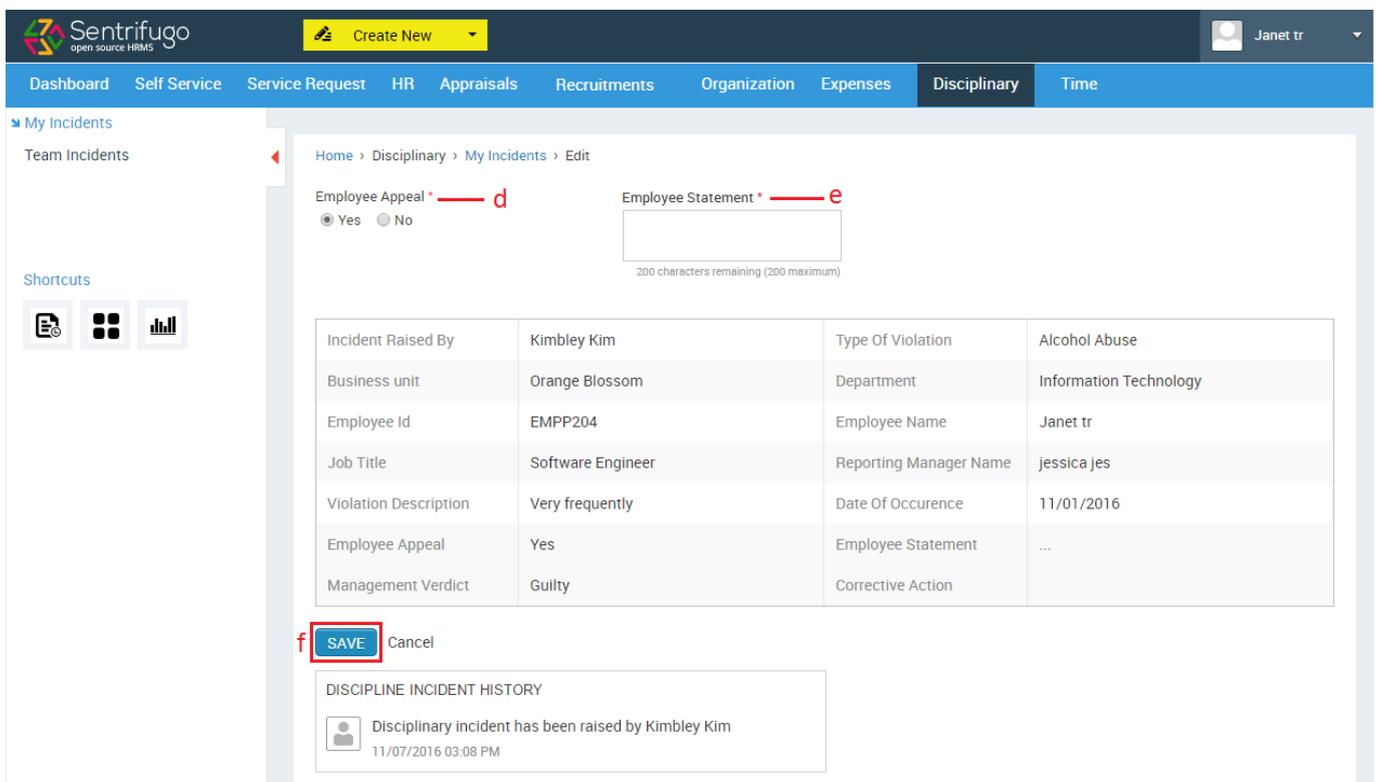


Figure 261

- d. Select **Yes** if you want to appeal and **No** if you don't want to appeal
- e. Provide your statement in the **Employee Statements** textbox
- f. Click **SAVE** button

## 17.6 How do I provide an appeal statement for another employee?



Only a Super Admin/Management can provide an appeal statement for other employees (if they're unavailable)

Please refer Figure 262

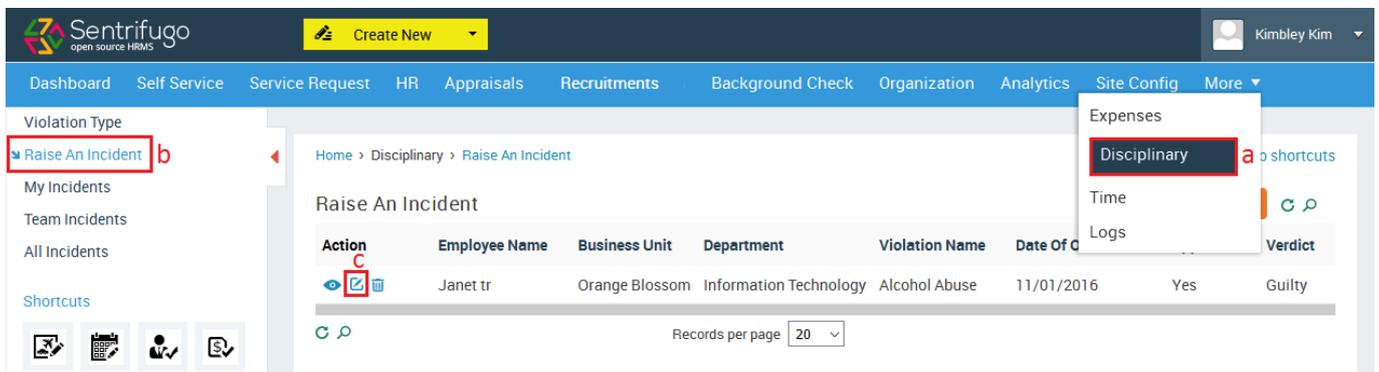


Figure 262

- a. Click **Disciplinary** in the top menu
- b. Click **Raise an Incident** on the left menu panel
- c. Click **Edit** icon in the Action column

Please refer Figure 263

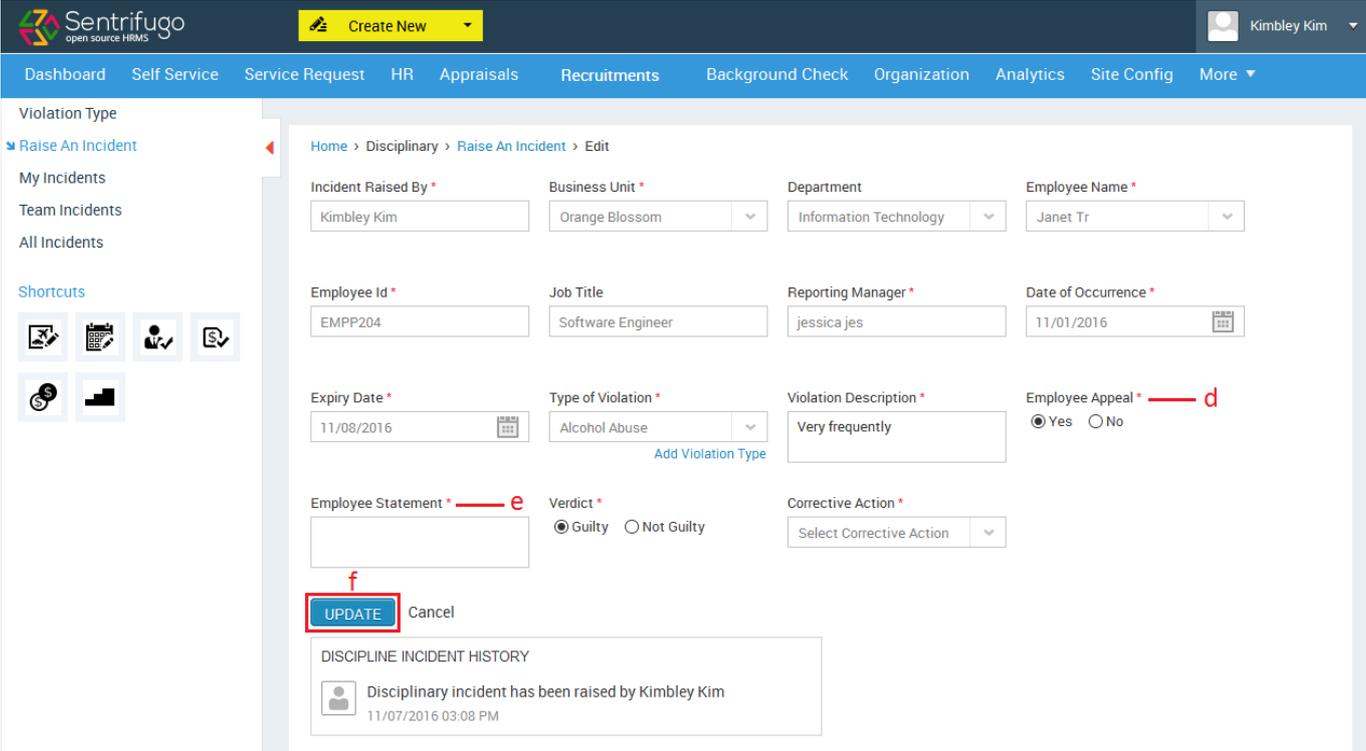
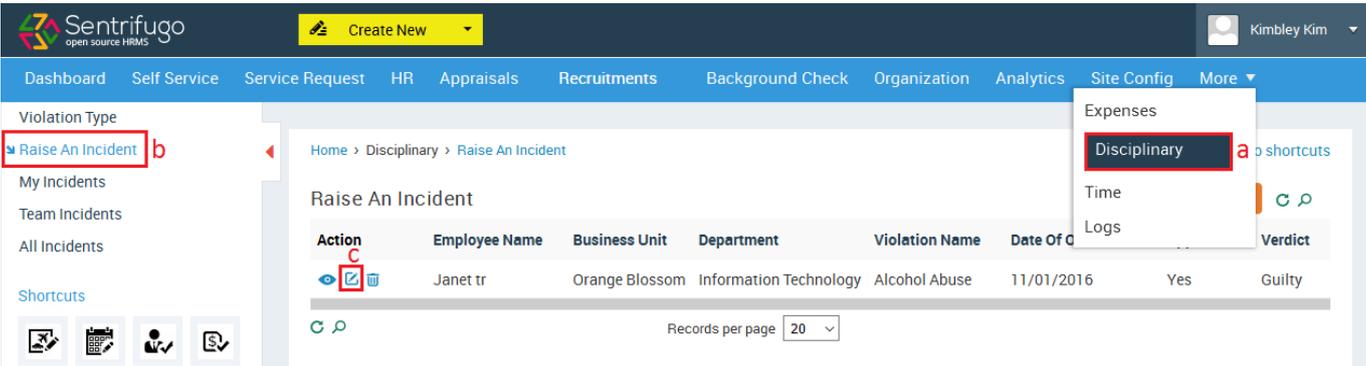


Figure 263

- d. Select **Yes** if the employee wants to appeal and **No** if the employee cannot appeal
- e. Provide the employee's statement in the **Employee Statement** textbox
- f. Click **Update** button

## 17.7 How do I take a corrective action against an employee?

Please refer Figure 264

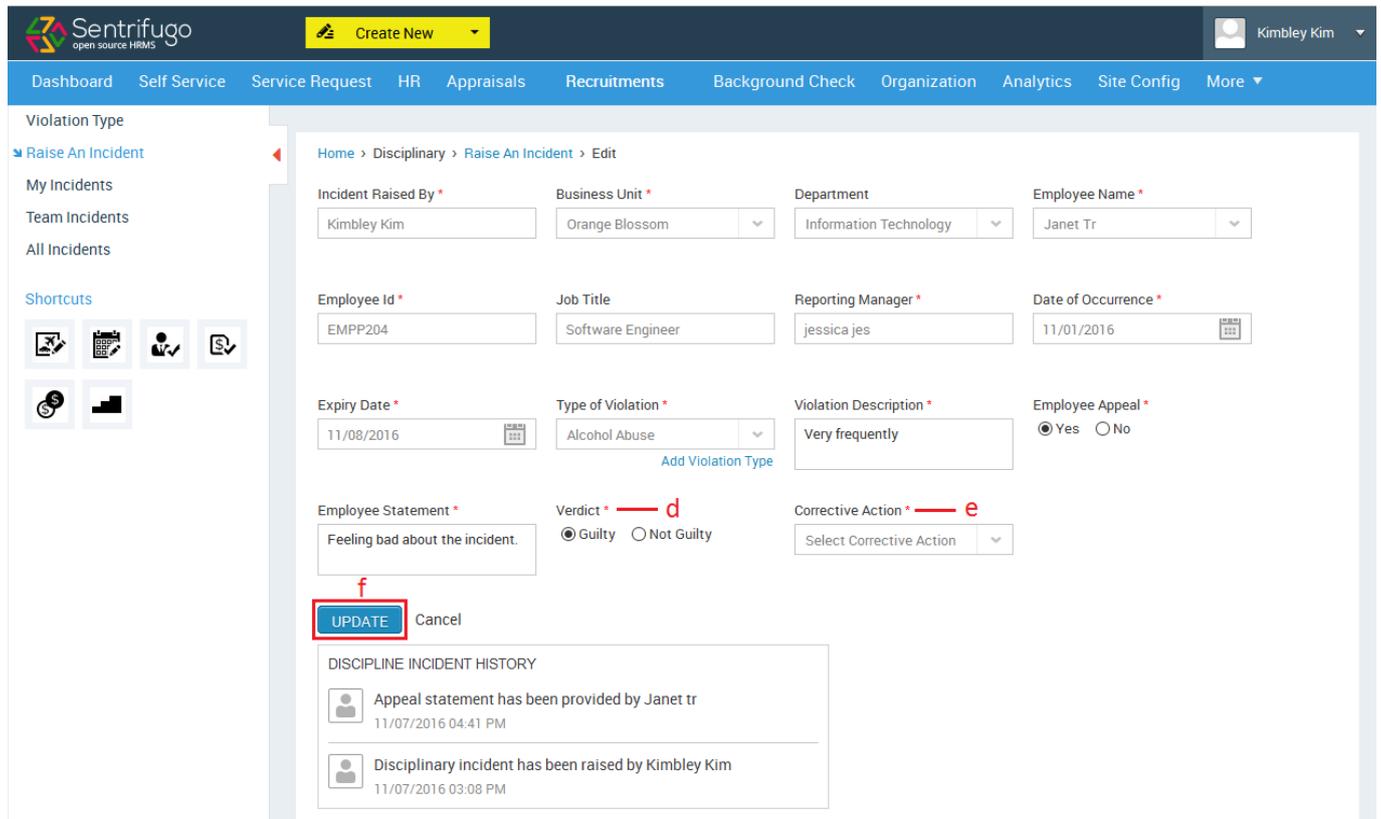


Action	Employee Name	Business Unit	Department	Violation Name	Date Of O	Yes	Verdict
	Janet tr	Orange Blossom	Information Technology	Alcohol Abuse	11/01/2016	Yes	Guilty

Figure 264

- a. Click **Disciplinary** in the top menu
- b. Click **Raise an Incident** on the left menu panel
- c. Click **Edit** icon in the Action column

Please refer Figure 265



Home > Disciplinary > Raise An Incident > Edit

Incident Raised By \* Kimbley Kim Business Unit \* Orange Blossom Department Information Technology Employee Name \* Janet Tr

Employee Id \* EMP204 Job Title Software Engineer Reporting Manager \* jessica jes Date of Occurrence \* 11/01/2016

Expiry Date \* 11/08/2016 Type of Violation \* Alcohol Abuse Violation Description \* Very frequently Employee Appeal \*  Yes  No

Employee Statement \* Feeling bad about the incident. Verdict \* **d**  Guilty  Not Guilty Corrective Action \* **e** Select Corrective Action

**f** UPDATE Cancel

DISCIPLINE INCIDENT HISTORY

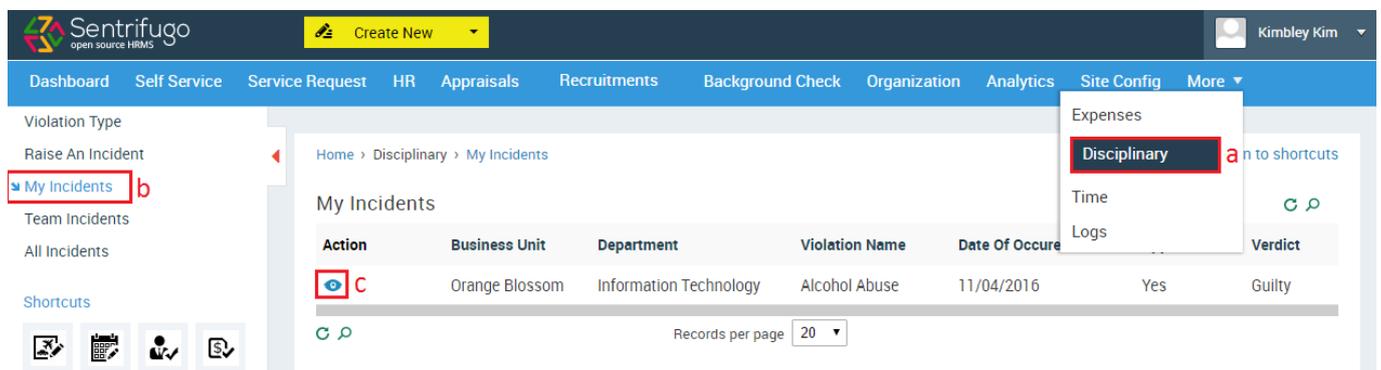
- Appeal statement has been provided by Janet tr 11/07/2016 04:41 PM
- Disciplinary incident has been raised by Kimbley Kim 11/07/2016 03:08 PM

Figure 265

- d. Select **Yes** if the employees is guilty and **No** if the employee is not guilty
- e. Select a **Corrective Action** that needs to be taken against an employee
- f. Click **Update** button

## 17.8 How do I print my disciplinary incident?

Please refer Figure 266



Home > Disciplinary > My Incidents

My Incidents

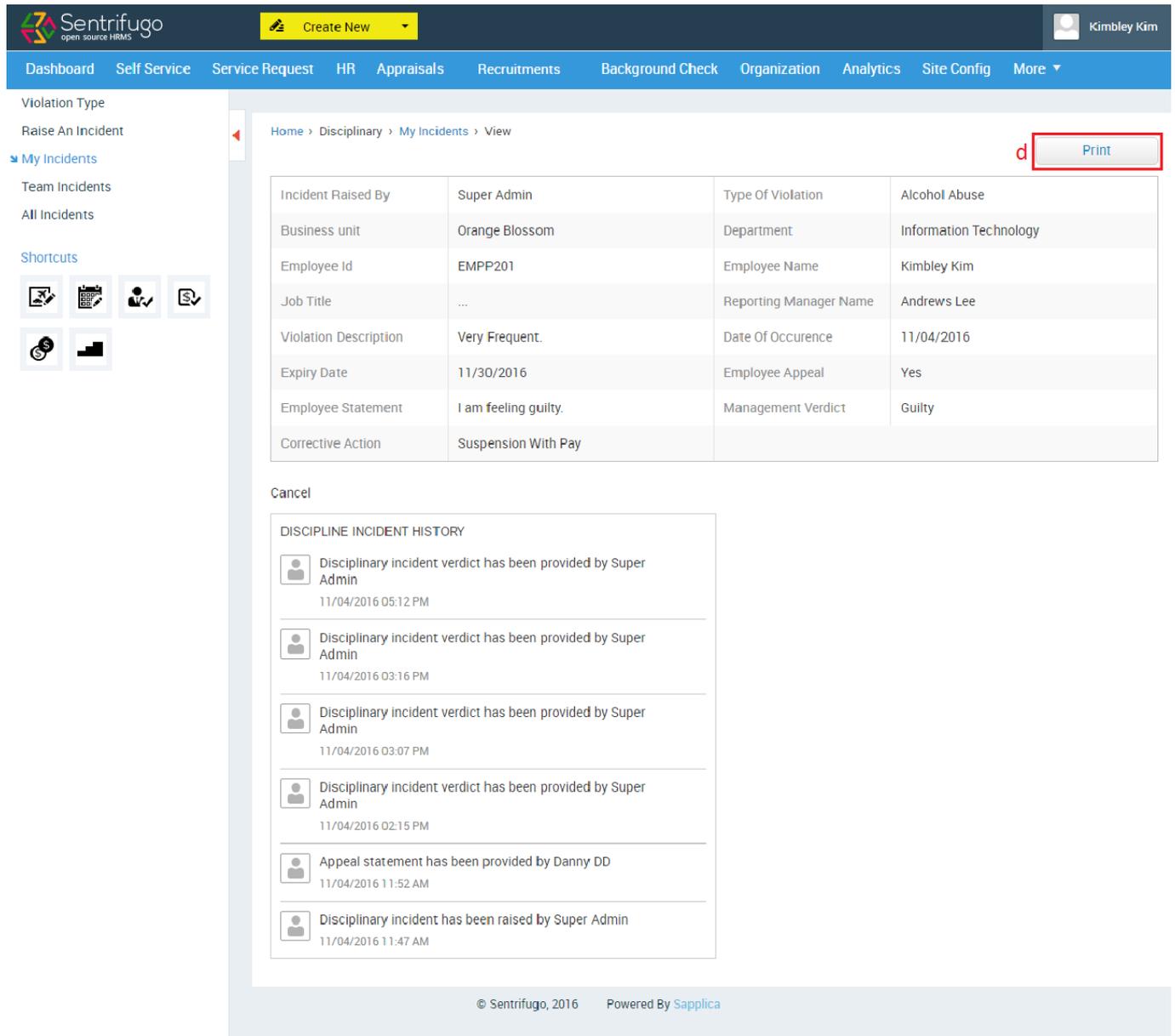
Action	Business Unit	Department	Violation Name	Date Of Occurrence	Verdict
<b>c</b>	Orange Blossom	Information Technology	Alcohol Abuse	11/04/2016	Yes Guilty

Records per page 20

Figure 266

- a. Click **Disciplinary** in the top menu
- b. Click **My Incidents** on the left menu panel
- c. Click **View** icon in the Action column

Please refer Figure 267



Home > Disciplinary > My Incidents > View

**d** [Print](#)

Incident Raised By	Super Admin	Type Of Violation	Alcohol Abuse
Business unit	Orange Blossom	Department	Information Technology
Employee Id	EMPP201	Employee Name	Kimbley Kim
Job Title	...	Reporting Manager Name	Andrews Lee
Violation Description	Very Frequent.	Date Of Occurrence	11/04/2016
Expiry Date	11/30/2016	Employee Appeal	Yes
Employee Statement	I am feeling guilty.	Management Verdict	Guilty
Corrective Action	Suspension With Pay		

Cancel

DISCIPLINE INCIDENT HISTORY

- Disciplinary incident verdict has been provided by Super Admin  
11/04/2016 05:12 PM
- Disciplinary incident verdict has been provided by Super Admin  
11/04/2016 03:16 PM
- Disciplinary incident verdict has been provided by Super Admin  
11/04/2016 03:07 PM
- Disciplinary incident verdict has been provided by Super Admin  
11/04/2016 02:15 PM
- Appeal statement has been provided by Danny DD  
11/04/2016 11:52 AM
- Disciplinary incident has been raised by Super Admin  
11/04/2016 11:47 AM

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Figure 267

d. Click **Print** button

## 17.9 How do I print an employee's disciplinary incident?

Please refer Figure 268

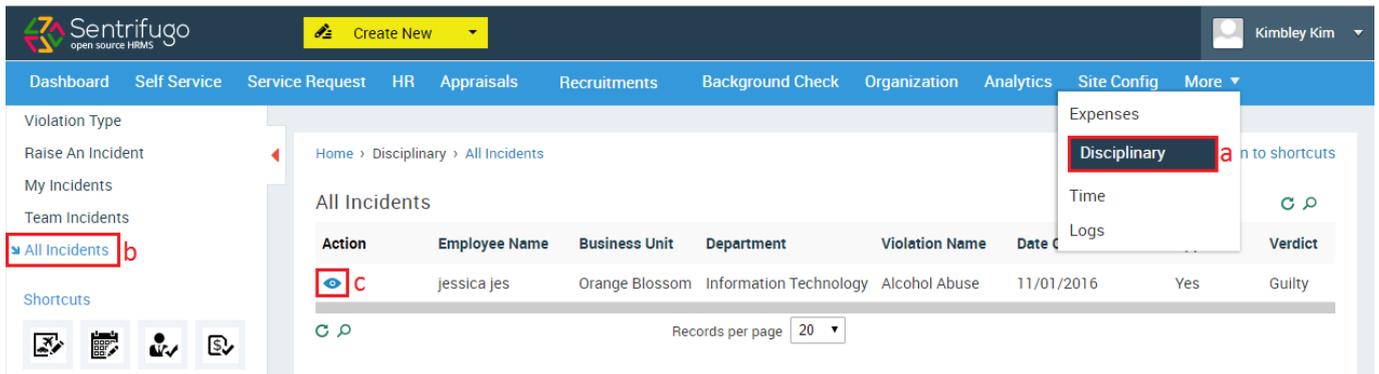


Figure 268

- a. Click **Disciplinary** in the top menu
- b. Click **All Incidents** on the left menu panel
- c. Click **View** icon in the Action column

Please refer Figure 269

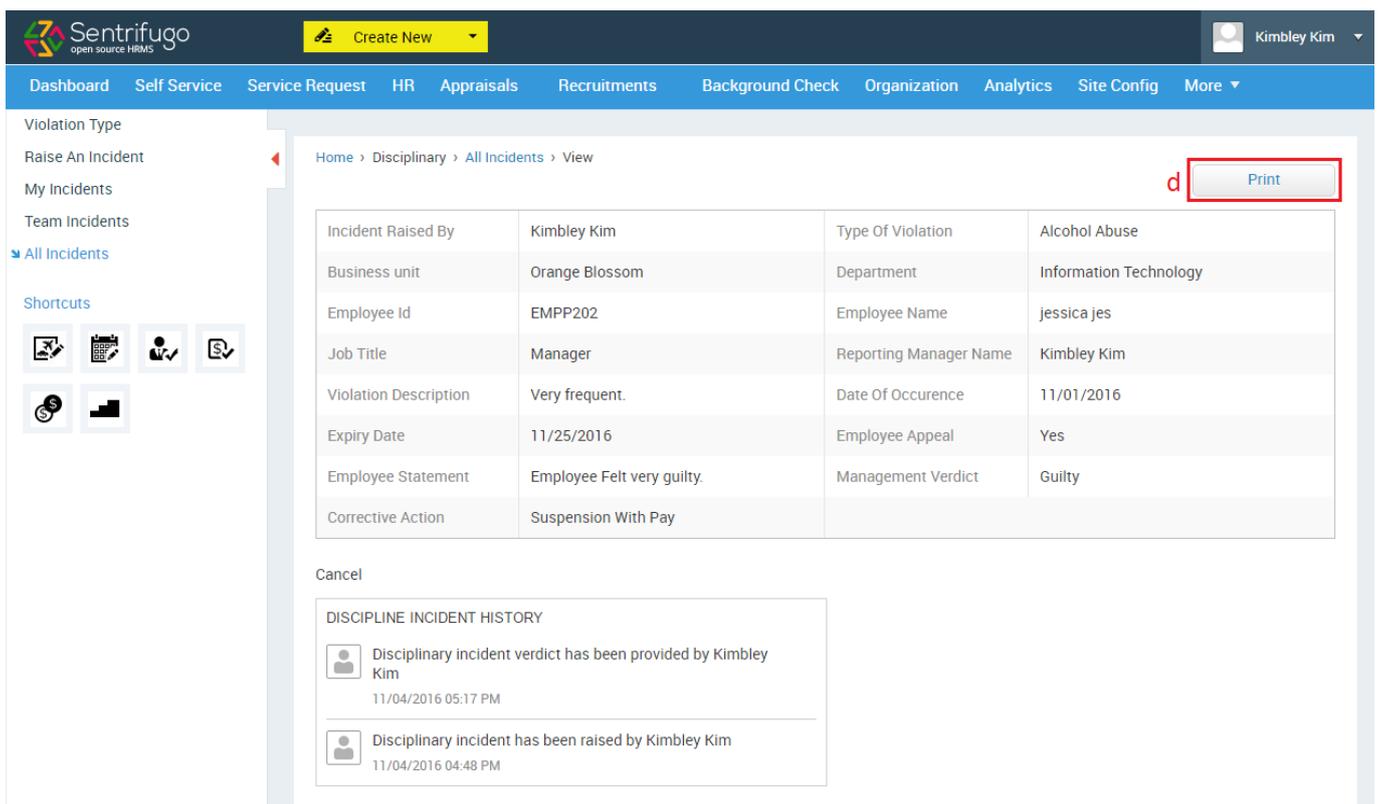


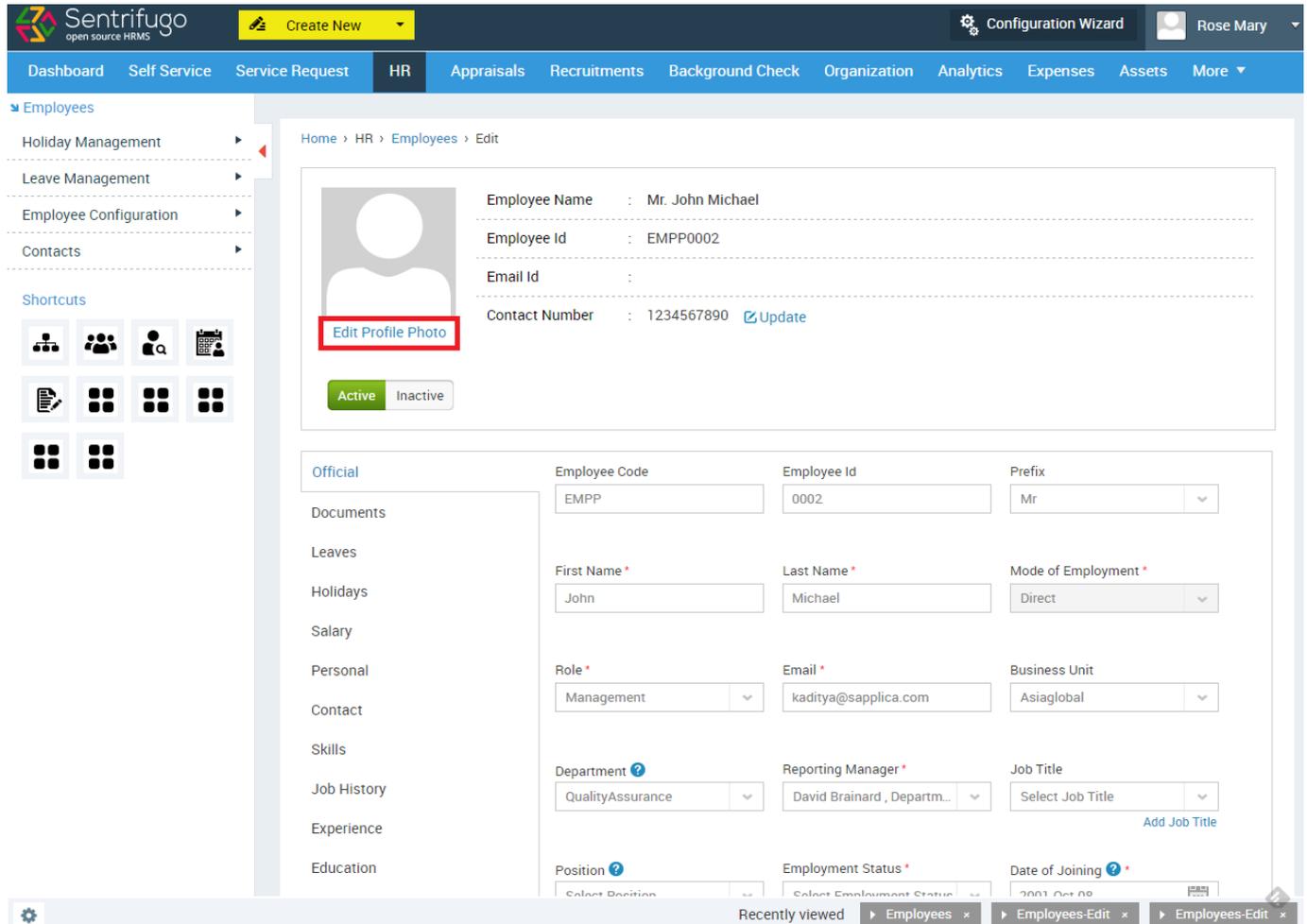
Figure 269

- d. Click **Print** button

## 18. Additional Features

### Upload Employees' Profile Photo as HR

HR can now upload employees' profile photos.



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Expenses', 'Assets', and 'More'. The 'HR' menu is active. On the left, there is a sidebar with 'Employees' and 'Shortcuts'. The main content area shows the 'Edit' profile page for 'Mr. John Michael' (Employee Id: EMPP0002). A red box highlights the 'Edit Profile Photo' button. Below the profile information, there are various form fields for employee details, including 'Employee Code', 'Employee Id', 'Prefix', 'First Name', 'Last Name', 'Mode of Employment', 'Role', 'Email', 'Business Unit', 'Department', 'Reporting Manager', 'Job Title', 'Position', 'Employment Status', and 'Date of Joining'.

### HR Configuration Wizard

The configuration wizard has been designed to aid the user in setting up the application in the right manner and to avoid the confusion regarding how to proceed further after a certain step.

It consists of 3 steps:


 Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use.
 
[Configure Later](#)
[Back To Site](#)

**1**  **Configure Leave Types**

Configure the leave types used in your organization.

In Progress

**2**  **Configure Holidays**

Configure the holidays used in your organization.

In Progress

**3**  **Appraisals**

Configure the performance appraisal parameters used in your organization.

In Progress

### Configure Employee Leave Types

[ADD LEAVE TYPE](#)

**SAVE**

[Next >](#)

- **Configure Leave Types:** Create leave types (E.g. Sick, Vacation) and allocate the number of days for each leave type.


 Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use.
 
[Configure Later](#)
[Back To Site](#)

 **Configure Leave Types**

Configure the leave types used in your organization.

Completed

**2**  **Configure Holidays**

Configure the holidays used in your organization.

In Progress

**3**  **Appraisals**

Configure the performance appraisal parameters used in your organization.

In Progress

### Configure Holidays

[ADD EMPLOYEE](#)

**Holiday Group \***

Select Holiday Group
▼

Add Holiday Group

**Holiday \***

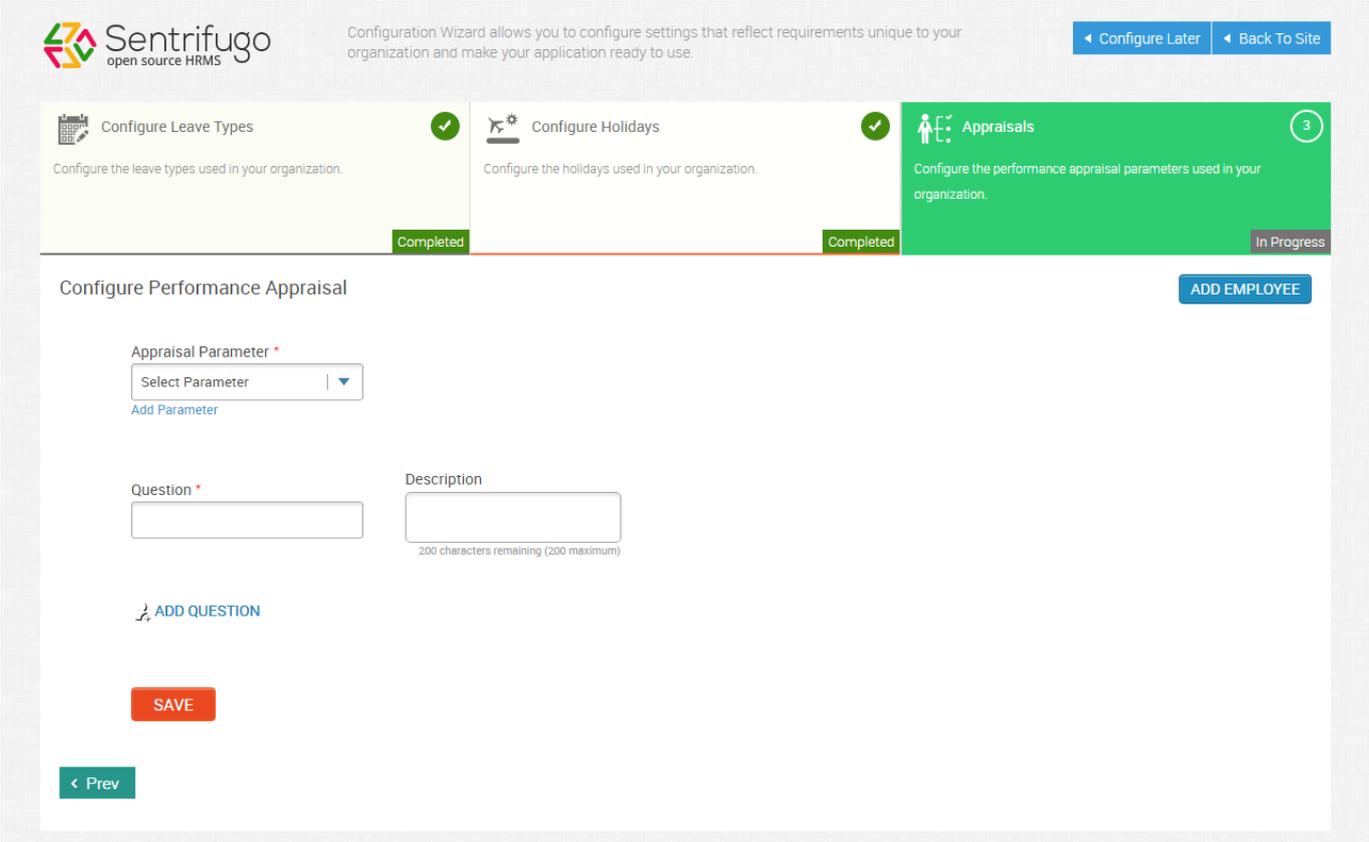
**Date ? \***

[ADD HOLIDAY](#)

**SAVE**

[< Prev](#)
[Next >](#)

- **Configure Holidays:** Create holiday groups and assign holidays to each group.



The screenshot shows the Sentrifugo Configuration Wizard interface. At the top, it says "Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use." There are two buttons: "Configure Later" and "Back To Site".

The wizard consists of three steps:

- Configure Leave Types**: "Configure the leave types used in your organization." Status: **Completed** (green checkmark).
- Configure Holidays**: "Configure the holidays used in your organization." Status: **Completed** (green checkmark).
- Appraisals**: "Configure the performance appraisal parameters used in your organization." Status: **In Progress** (red circle with '3').

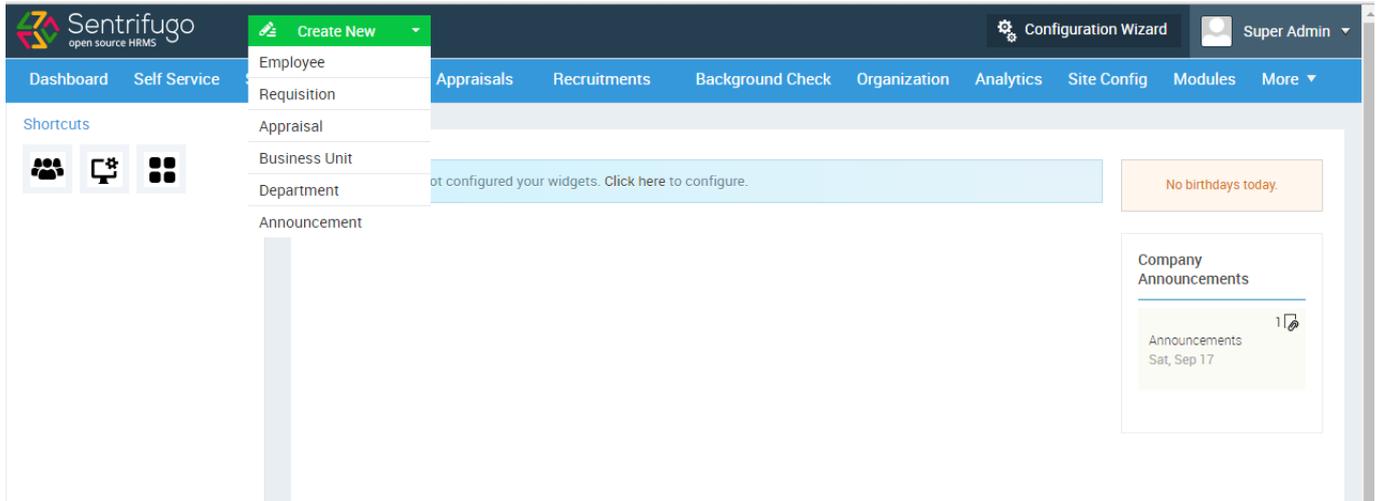
The main content area is titled "Configure Performance Appraisal" and includes an "ADD EMPLOYEE" button. The form contains:

- Appraisal Parameter \***: A dropdown menu with "Select Parameter" and an "Add Parameter" link below it.
- Question \***: A text input field.
- Description**: A text input field with a character count: "200 characters remaining (200 maximum)".
- ADD QUESTION**: A button with a plus icon.
- SAVE**: A red button.
- < Prev**: A green button.

- **Appraisals:** Add appraisal parameters (E.g. KPI, KRA) and allot questions for each parameter.

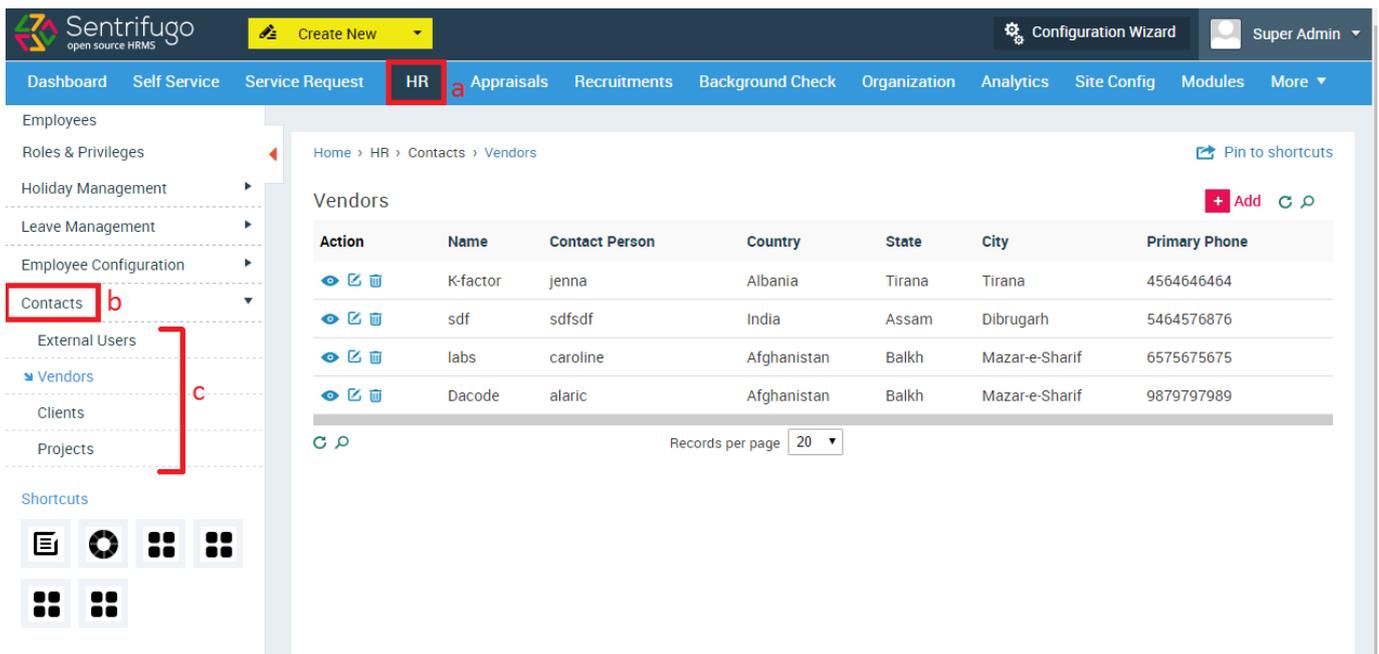
## Create New Shortcut Button

This shortcut button is placed on the top left corner (beside your organization logo) of the application. This button has been designed to save your time from menu redirections. The number of options displayed depends on a user's role privileges. For example, if you belong to the Management role group, then you will be able to create new Employees, Requisitions, Appraisals, Business Units, and Departments etc. If you belong to the Employee role group you can only create Service and Leave requests.



## Contacts

You can now manage and store your organization's external users, vendors, and clients' details all in one place.



- Click **HR** in the top menu
- Click **Contacts** on the left menu panel
- You can click on any contact to add/view External Users/Vendors/Clients