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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 to 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 application. Hover the mouse pointer over this icon to view a brief description for an option
	Enable/Edit/View Questions icon used in Sentrifugo application.

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.



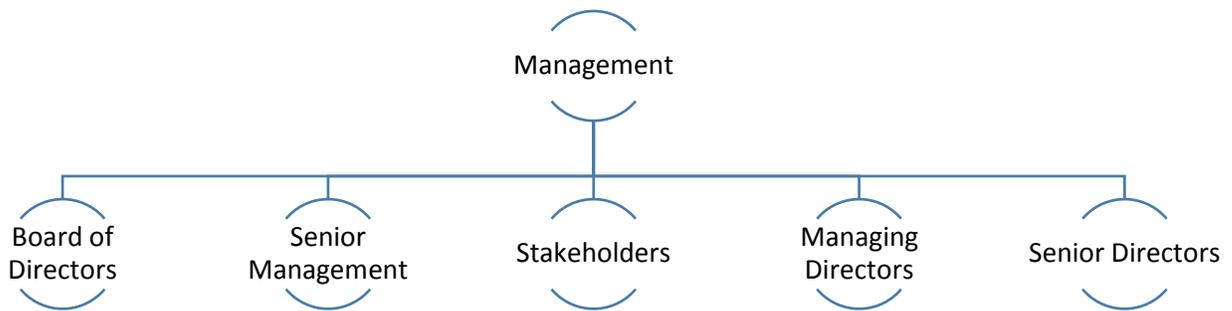
Since the Super Admin will not be included in the employee's list, he/she will not be able to perform employee actions like raising a leave request, service request, submitting timesheets etc. You can add another employee to Sentrifugo for the Super Admin user, with his/her actual details like Name,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

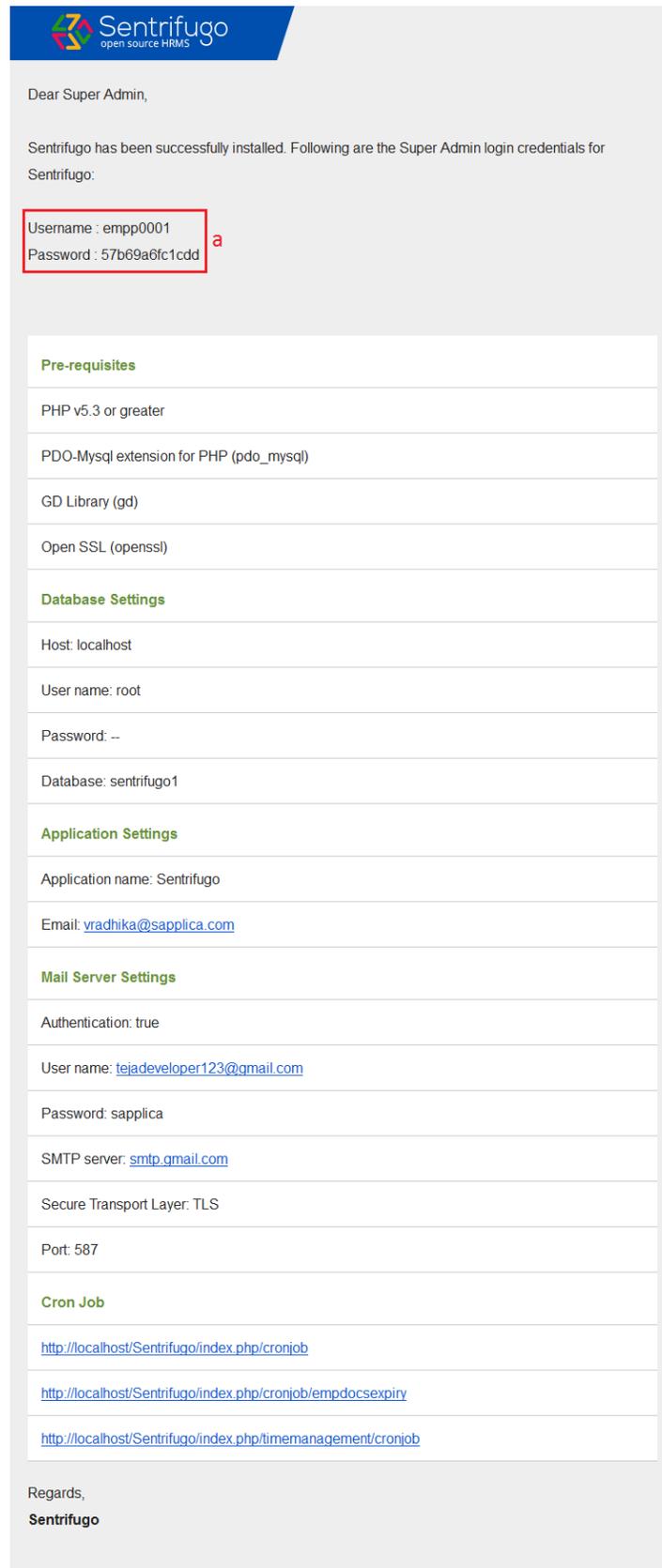


Figure 1

- 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.



The screenshot shows an email from Sentrifugo to the Super Admin. The email header includes the Sentrifugo logo and the text "Dear Super Admin,". The main body of the email states: "Sentrifugo has been successfully installed. Following are the Super Admin login credentials for Sentrifugo:". A red box highlights the login credentials: "Username : empp0001" and "Password : 57b69a6fc1cdd". Below the credentials, there is a table of settings organized into sections: Pre-requisites, Database Settings, Application Settings, Mail Server Settings, and Cron Job. The Pre-requisites section lists PHP v5.3 or greater, PDO-Mysql extension for PHP (pdo_mysql), GD Library (gd), and Open SSL (openssl). The Database Settings section lists Host: localhost, User name: root, Password: --, and Database: sentrifugo1. The Application Settings section lists Application name: Sentrifugo and Email: vradhika@sapplica.com. The Mail Server Settings section lists Authentication: true, User name: tejadeveloper123@gmail.com, Password: sapplica, SMTP server: sntp.gmail.com, Secure Transport Layer: TLS, and Port: 587. The Cron Job section lists three URLs: <http://localhost/Sentrifugo/index.php/cronjob>, <http://localhost/Sentrifugo/index.php/cronjob/empdocsexpiry>, and <http://localhost/Sentrifugo/index.php/timemanagement/cronjob>. The email concludes with "Regards, Sentrifugo".

Dear Super Admin,

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

Username : empp0001
Password : 57b69a6fc1cdd

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: vradhika@sapplica.com

Mail Server Settings
Authentication: true
User name: tejadeveloper123@gmail.com
Password: sapplica
SMTP server: sntp.gmail.com
Secure Transport Layer: TLS
Port: 587

Cron Job
http://localhost/Sentrifugo/index.php/cronjob
http://localhost/Sentrifugo/index.php/cronjob/empdocsexpiry
http://localhost/Sentrifugo/index.php/timemanagement/cronjob

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.

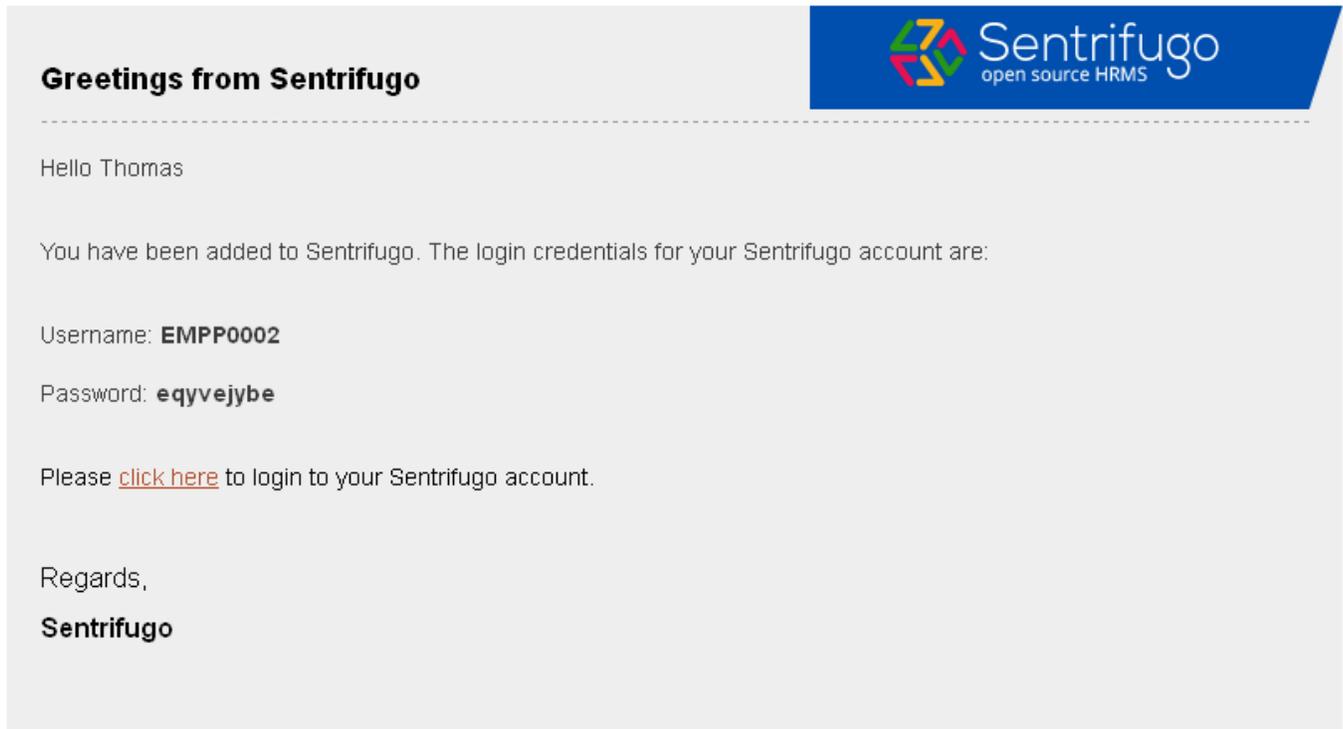
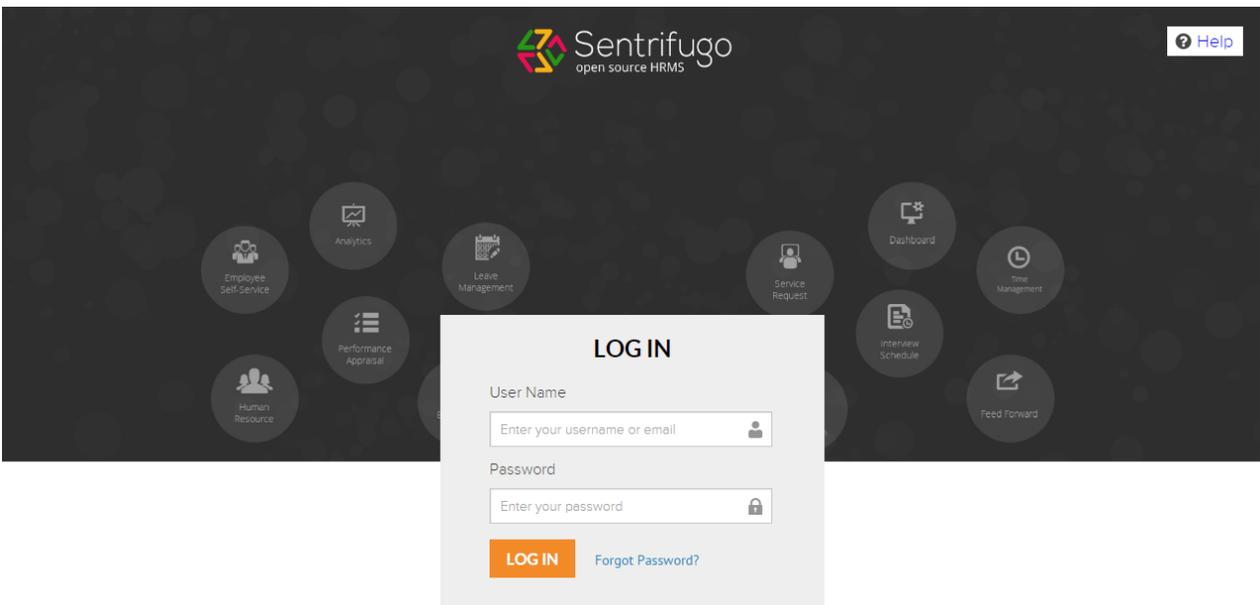


Figure 3

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.

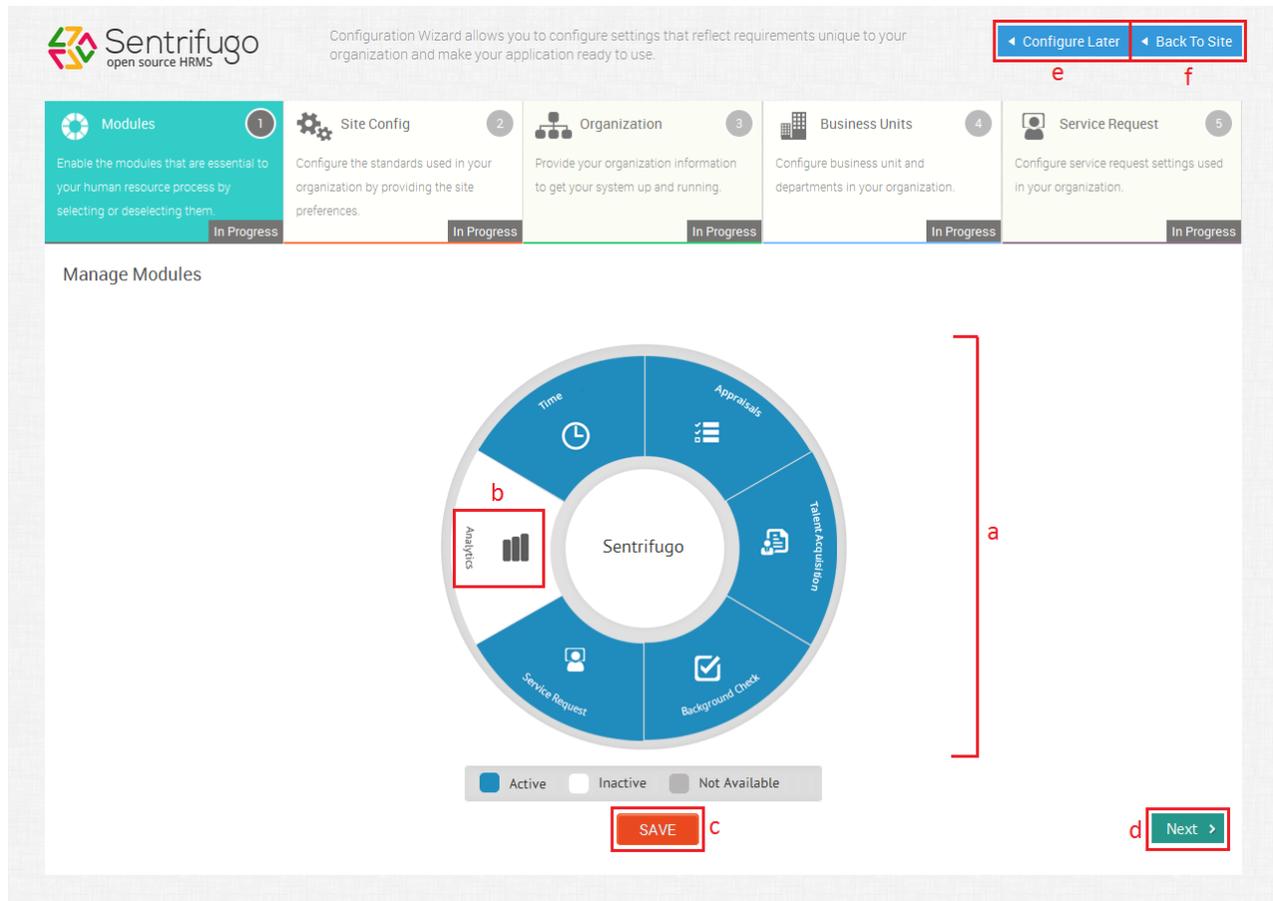
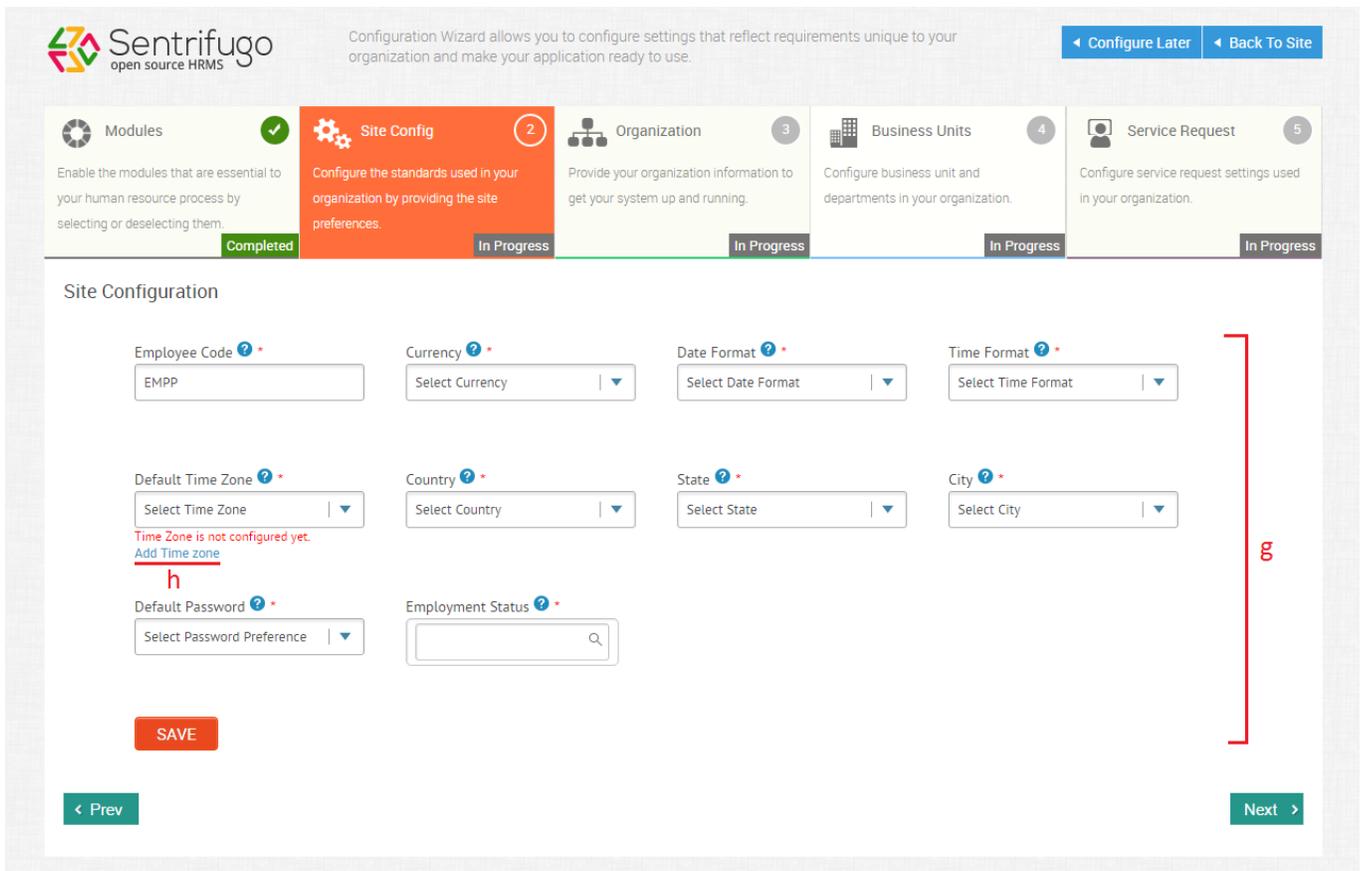


Figure 4

- 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 >](#)

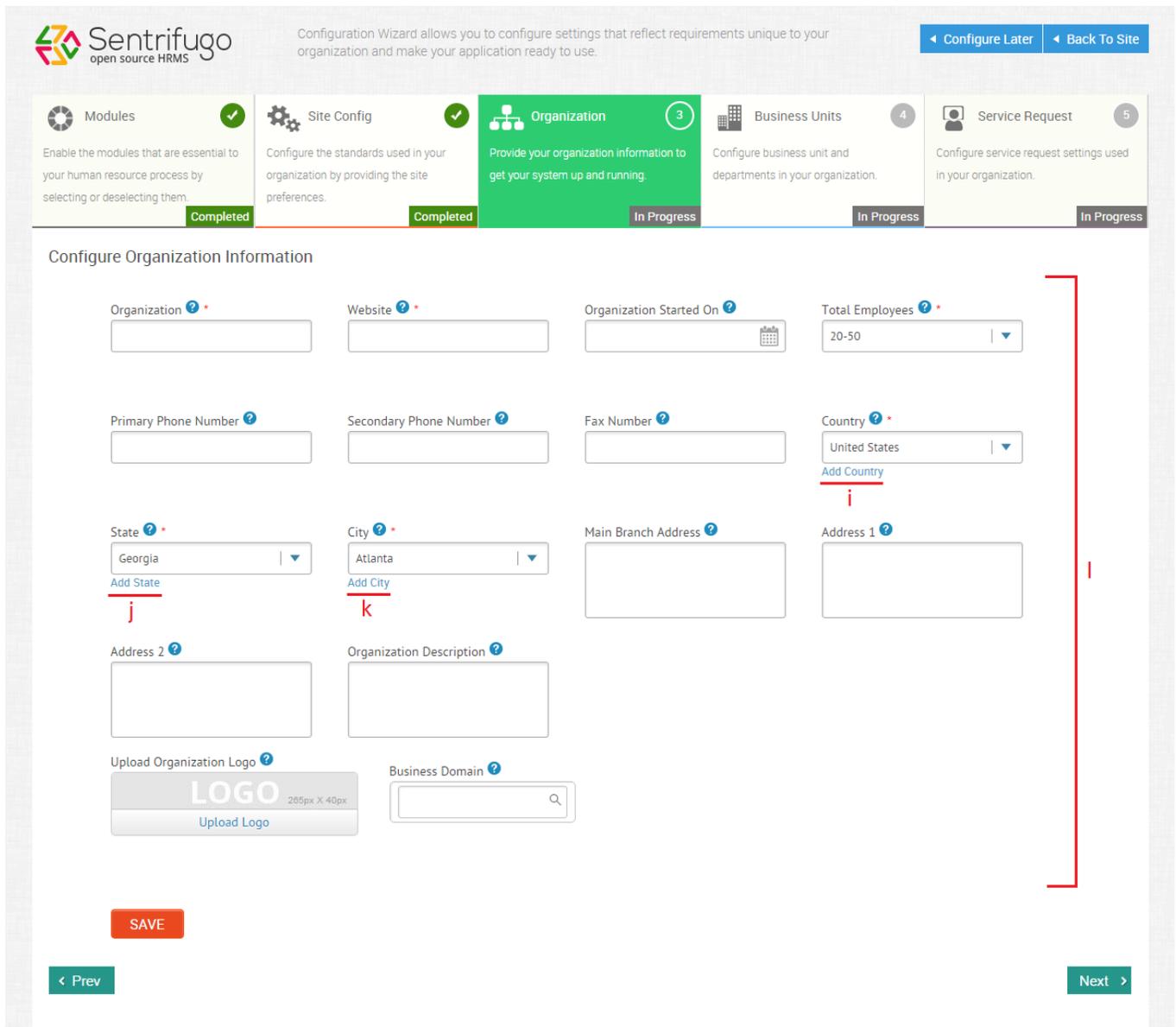
Figure 5

- 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 [?] * |
 Website [?] * |
 Organization Started On [?] |
 Total Employees [?] * 20-50

Primary Phone Number [?] |
 Secondary Phone Number [?] |
 Fax Number [?] |
 Country [?] * United States | [Add Country](#) ⁱ

State [?] * Georgia | [Add State](#) ^j |
 City [?] * Atlanta | [Add City](#) ^k |
 Main Branch Address [?] |
 Address 1 [?]

Address 2 [?] |
 Organization Description [?]

Upload Organization Logo [?] LOGO 285px X 40px |
 Business Domain [?]

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.

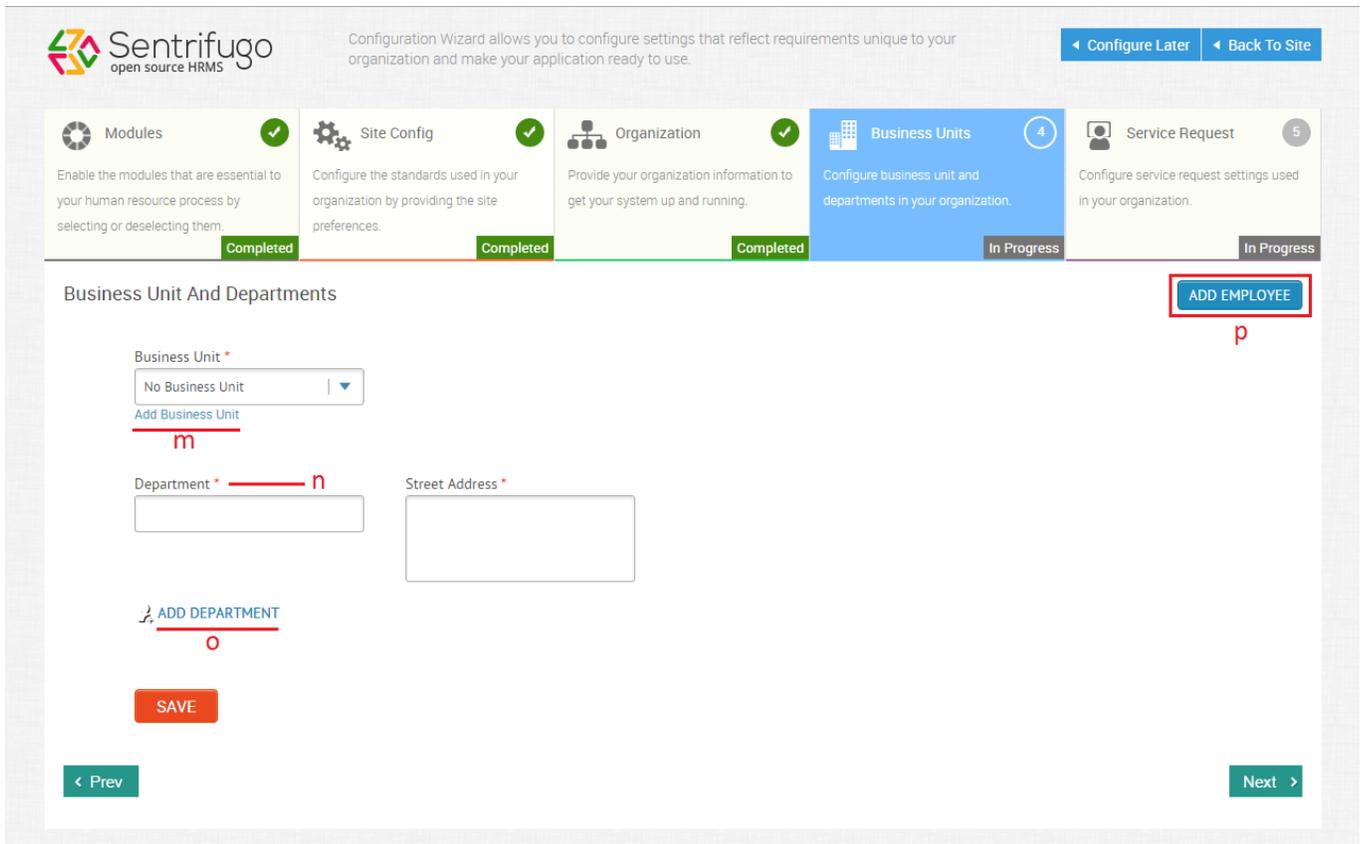


Figure 7

- 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.

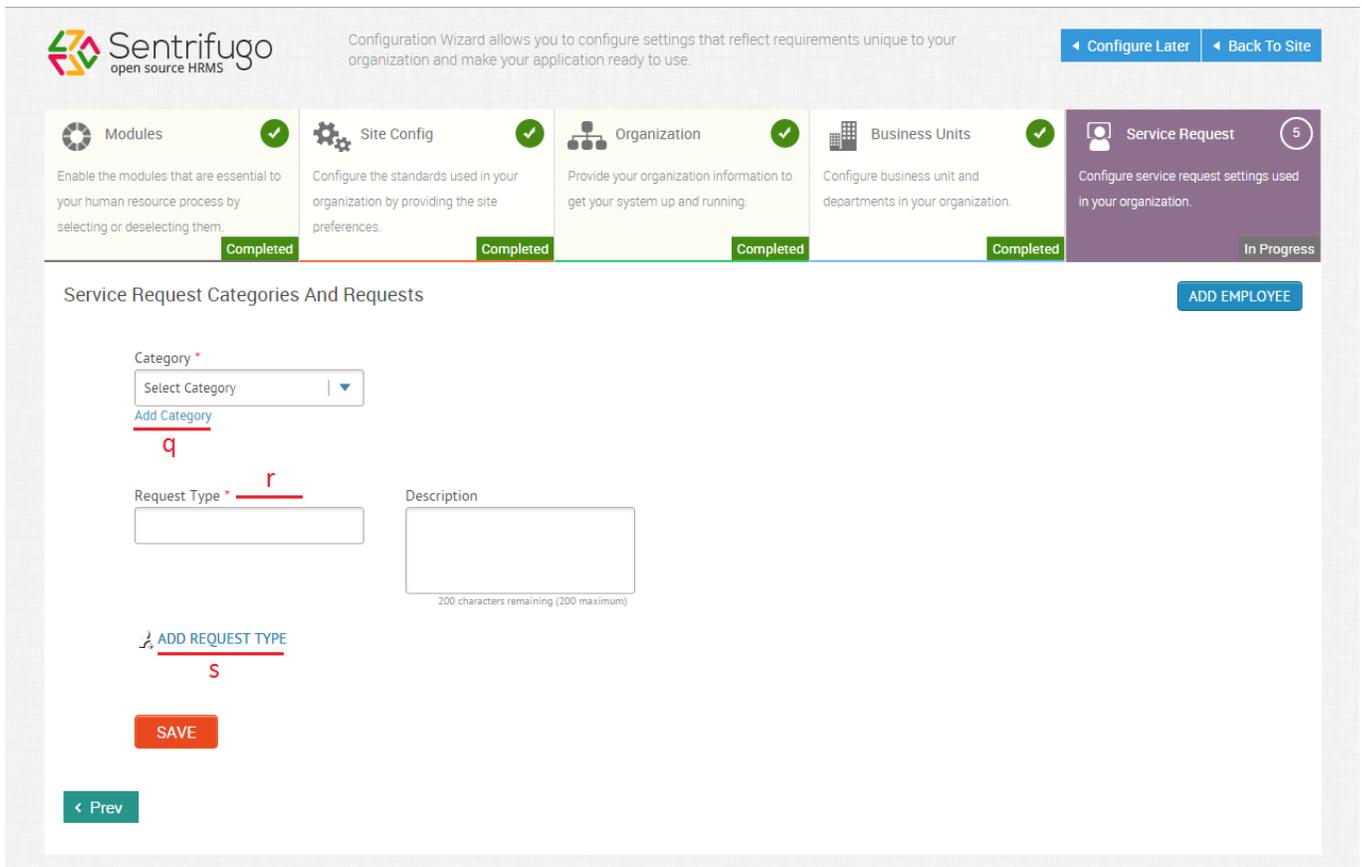


Figure 8

- 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.

Figure 9

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

1.4.2 Adding Other Employees

Please refer Figure 10.

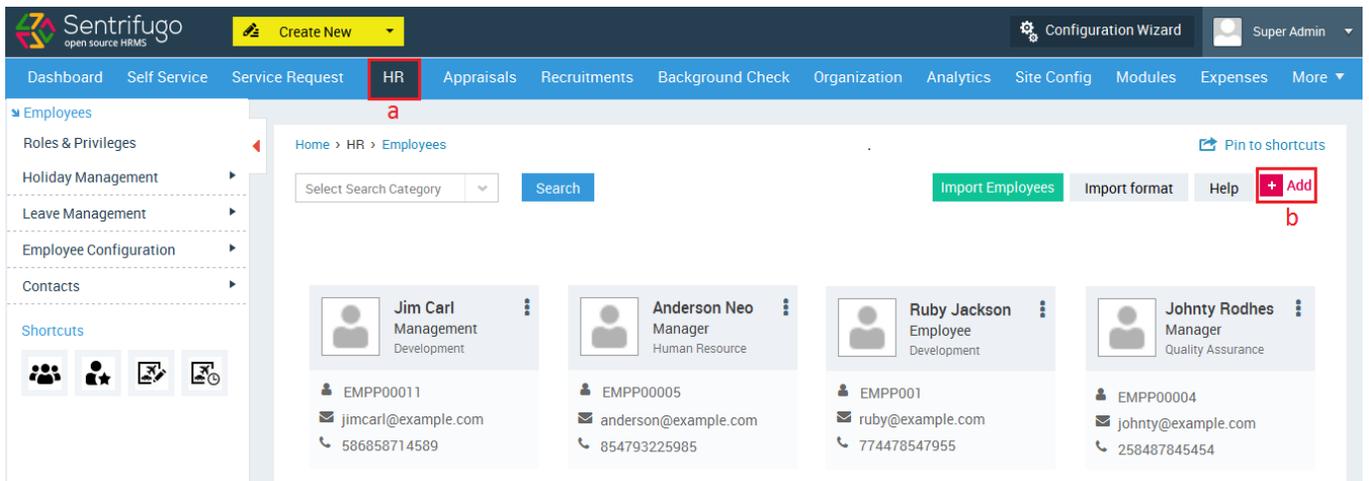


Figure 10

- a. Click **HR** in the top menu
- b. 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 *

Configure Identity Codes

Employee Id *

Prefix

Add Prefix

First Name *

Last Name *

Mode of Employment *

Role *

Email *

Business Unit

Department ? *

Reporting Manager *

Job Title

Add Job Title

Position ?

Add Position

Employment Status *

Add Employment Status

Date of Joining ? *

Date of Leaving ?

Years of Experience

Work Telephone Number

Extension

Fax

Save

Cancel

Figure 11

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

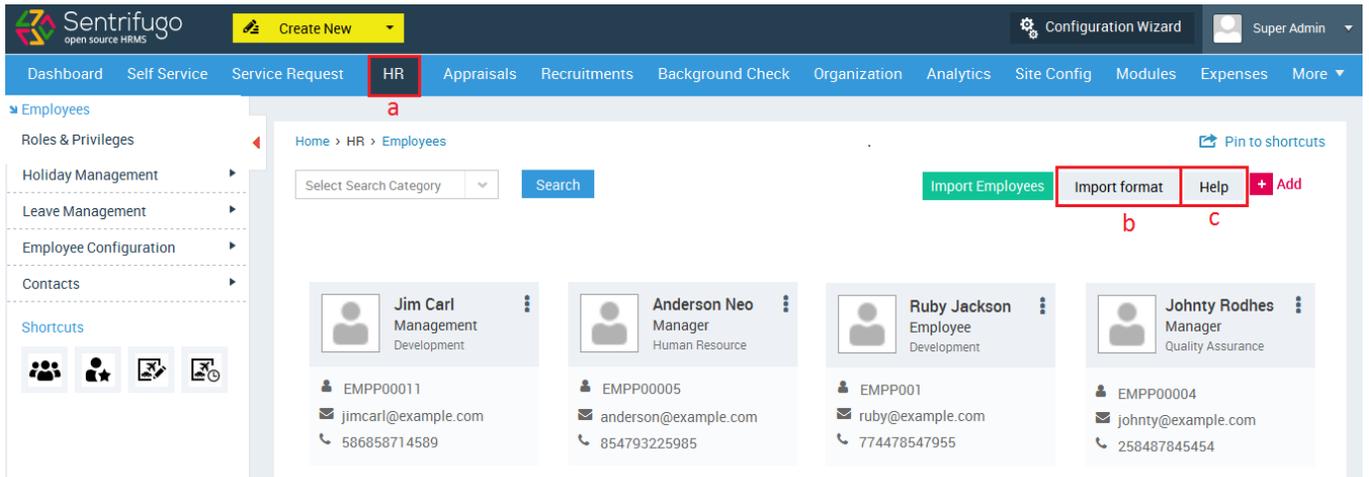


Figure 12

- Click **HR** in the top menu
- Click **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.

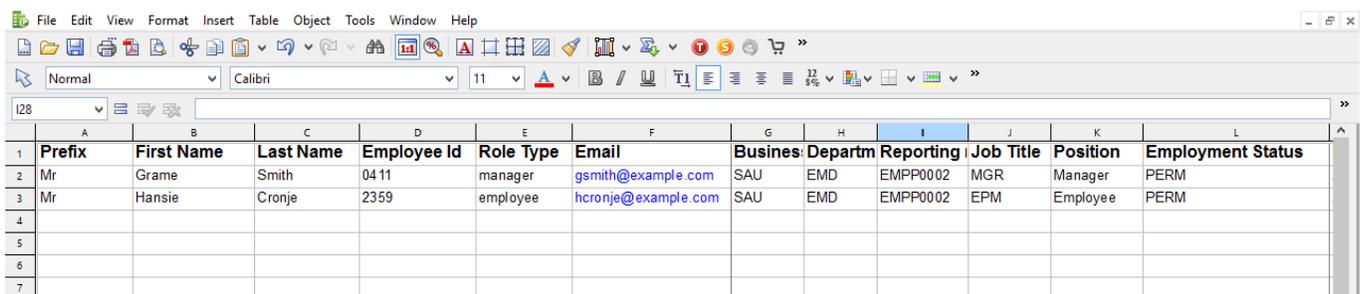


Figure 13

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)

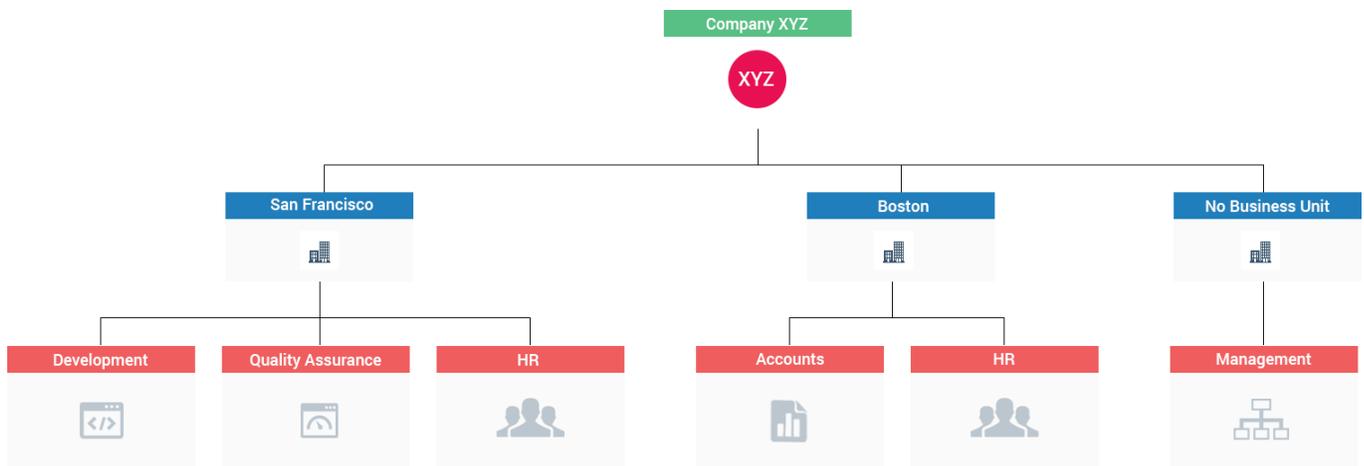
For example: <http://example.com/sentrifugo/index.php/cronjob>



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.

Organization Info

- Business Units** b
- Departments
- Organization Structure
- Organization Hierarchy
- Announcements
- Policy Documents

Home > Organization > Business Units

Business Units C + Add ↻ ↺

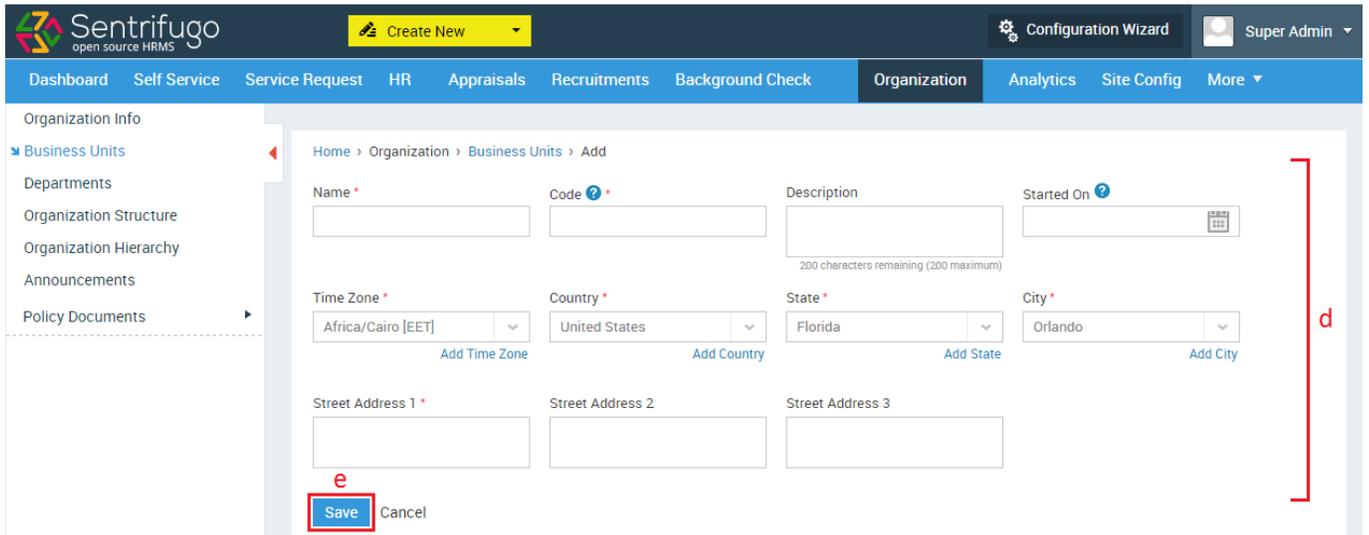
Action	Name	Code	Started On	Street Address	City	State	Country	Time zone
👁 ✎ 🗑	Orange Blossom	ORB	2011-Aug-16	Bakes man street	Atlanta	Georgia	United States	Africa/Cairo [EET]
👁 ✎ 🗑	Avenue	AVE	2014-Aug-13	Brooklyn street	Orlando	Florida	United States	Africa/Accra [GMT]

Records per page 20

Figure 14

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

Please refer Figure 15.



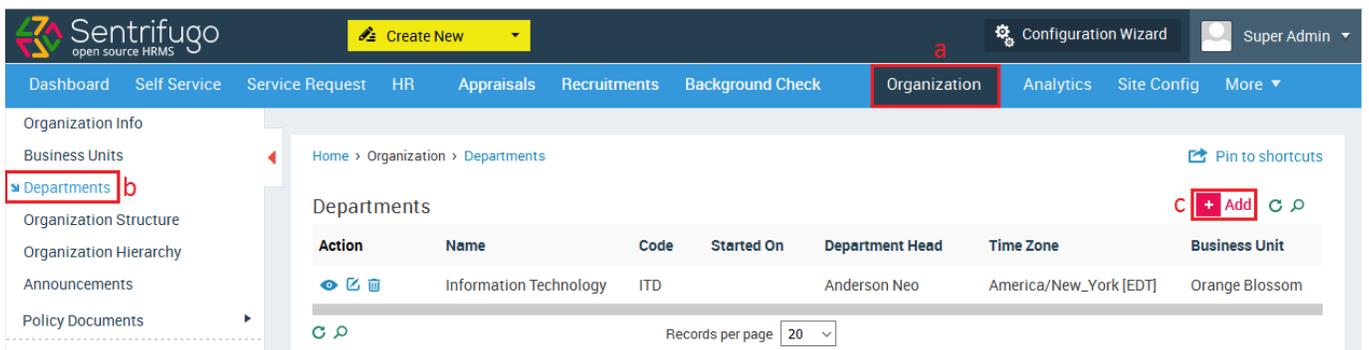
The screenshot shows the 'Add Business Unit' form in the Sentrifugo application. The form is titled 'Home > Organization > Business Units > Add'. It contains several input fields: 'Name *', 'Code ? *', 'Description' (with a 200-character limit), 'Started On ?' (calendar icon), 'Time Zone *' (dropdown menu), 'Country *' (dropdown menu), 'State *' (dropdown menu), and 'City *' (dropdown menu). Below these are three 'Street Address' fields (1, 2, and 3). At the bottom left, there are 'Save' and 'Cancel' buttons. A red box labeled 'e' highlights the 'Save' button. A red bracket labeled 'd' spans the right side of the form fields.

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 with a red box labeled 'a'. In the left sidebar, the 'Departments' menu item is highlighted with a red box labeled 'b'. In the top right corner, there is a '+ Add' button highlighted with a red box labeled 'c'. The table below shows a single department entry.

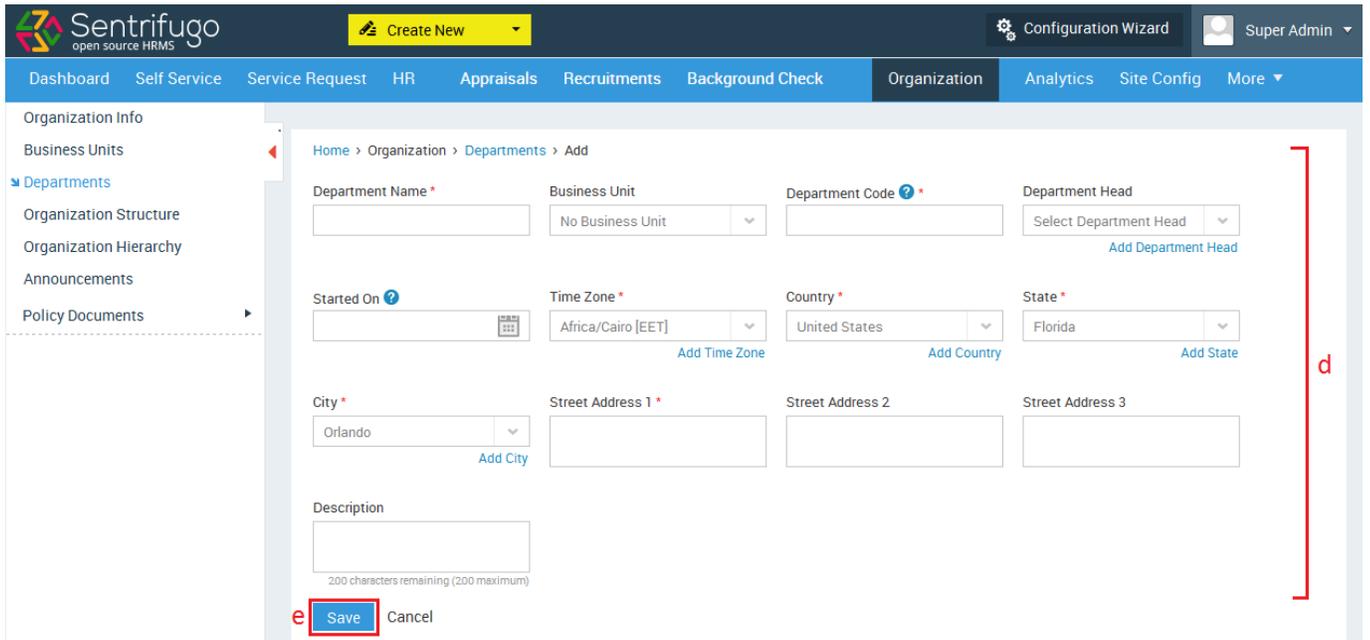
Action	Name	Code	Started On	Department Head	Time Zone	Business Unit
  	Information Technology	ITD		Anderson Neo	America/New_York [EDT]	Orange Blossom

Records per page: 20

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

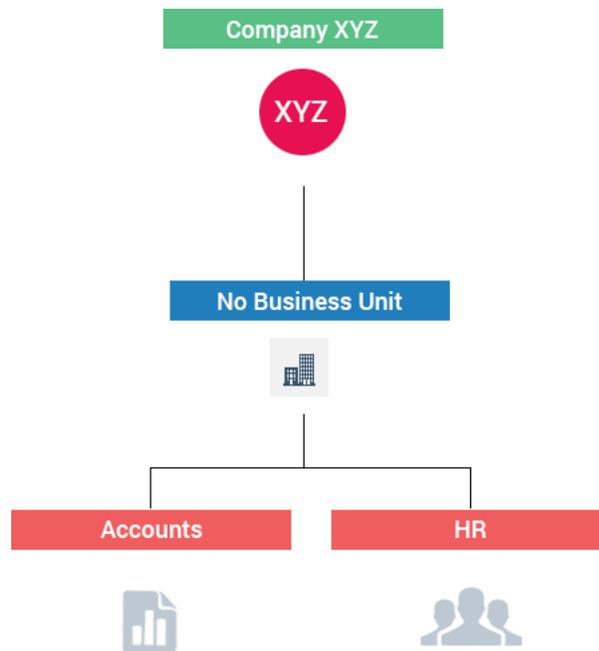
d

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.

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.

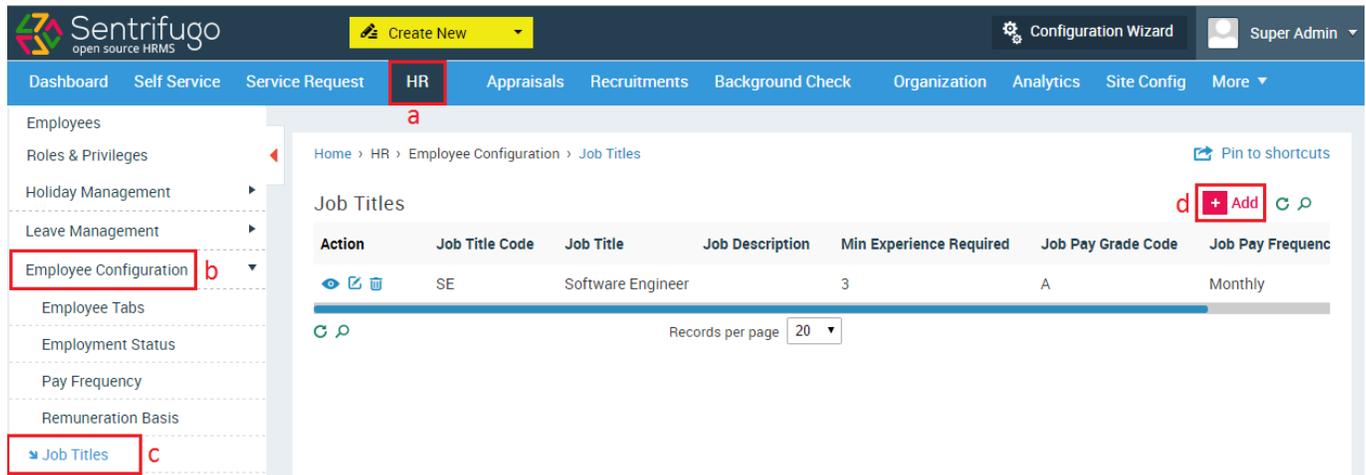


Figure 19

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

Please refer Figure 20.

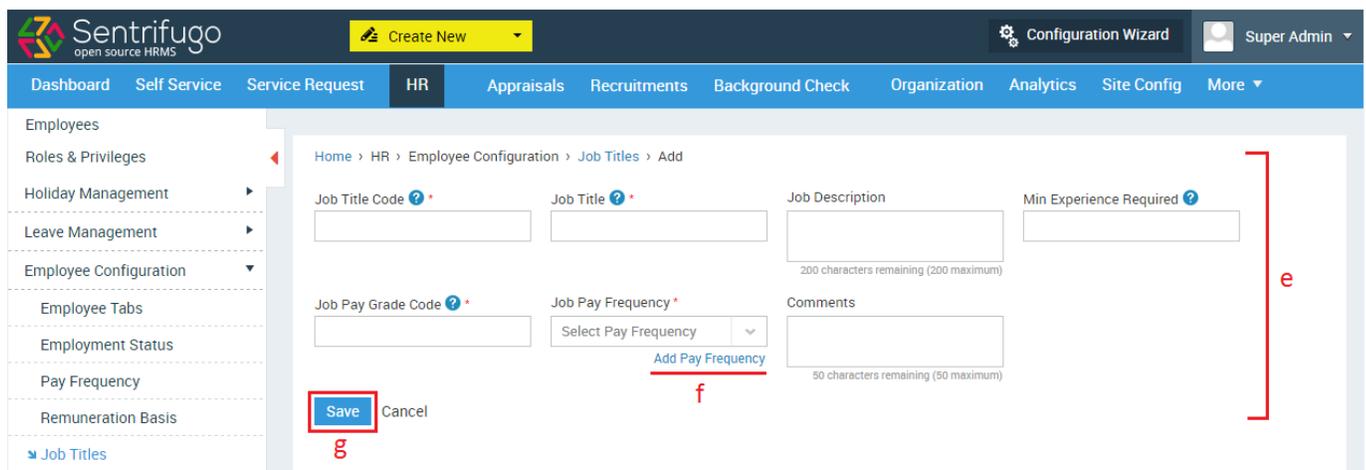


Figure 20

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

1.6.2 Adding Positions

Please refer Figure 21.

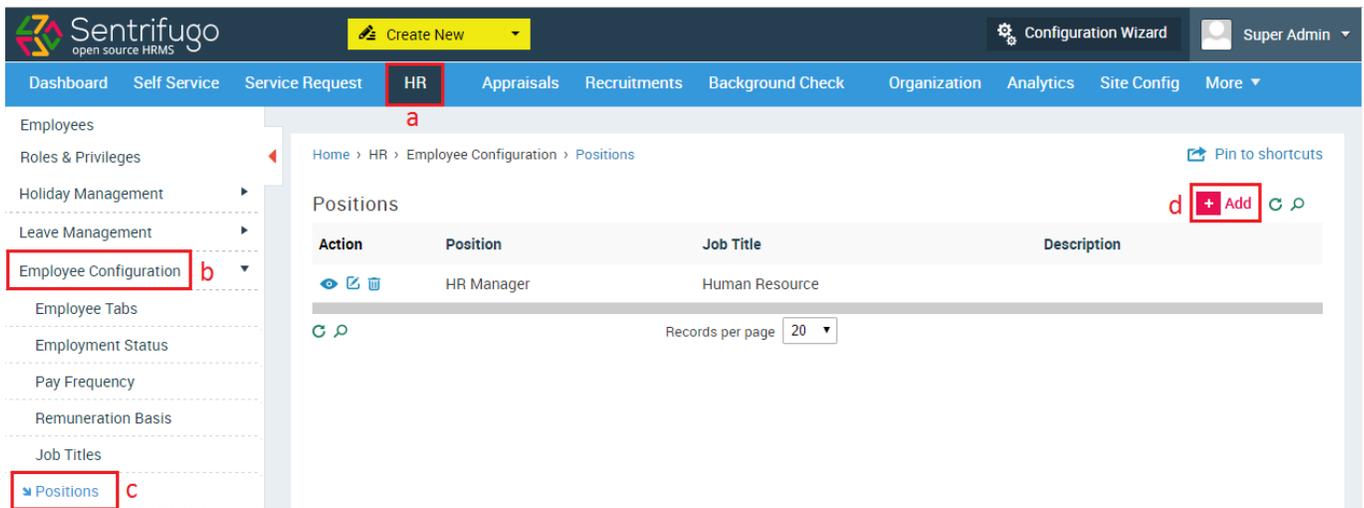


Figure 21

- 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.

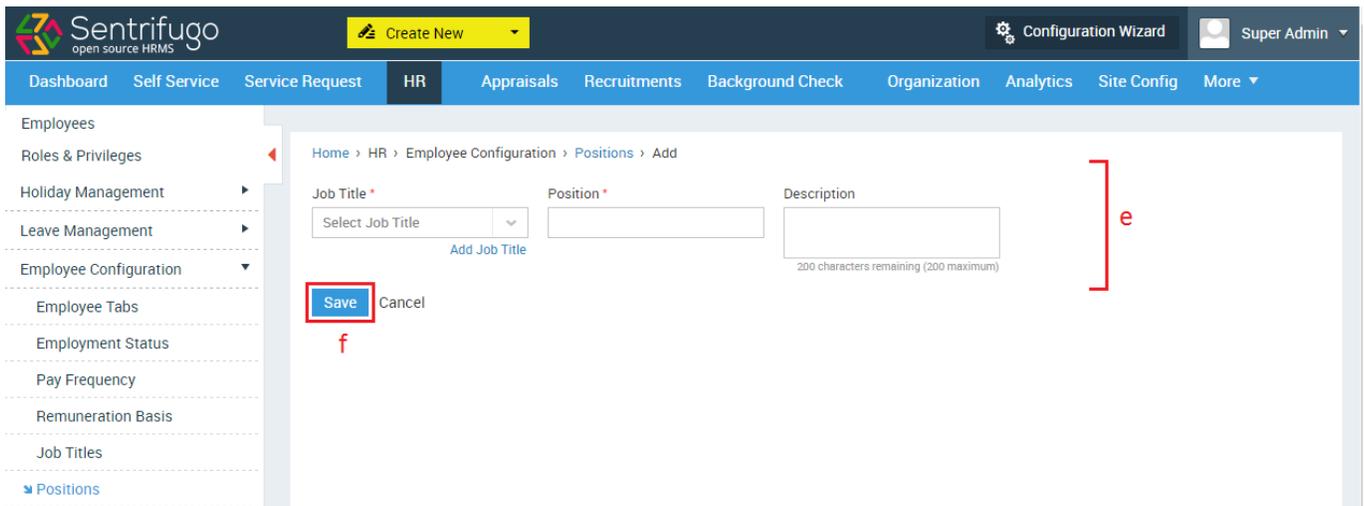


Figure 22

- 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.

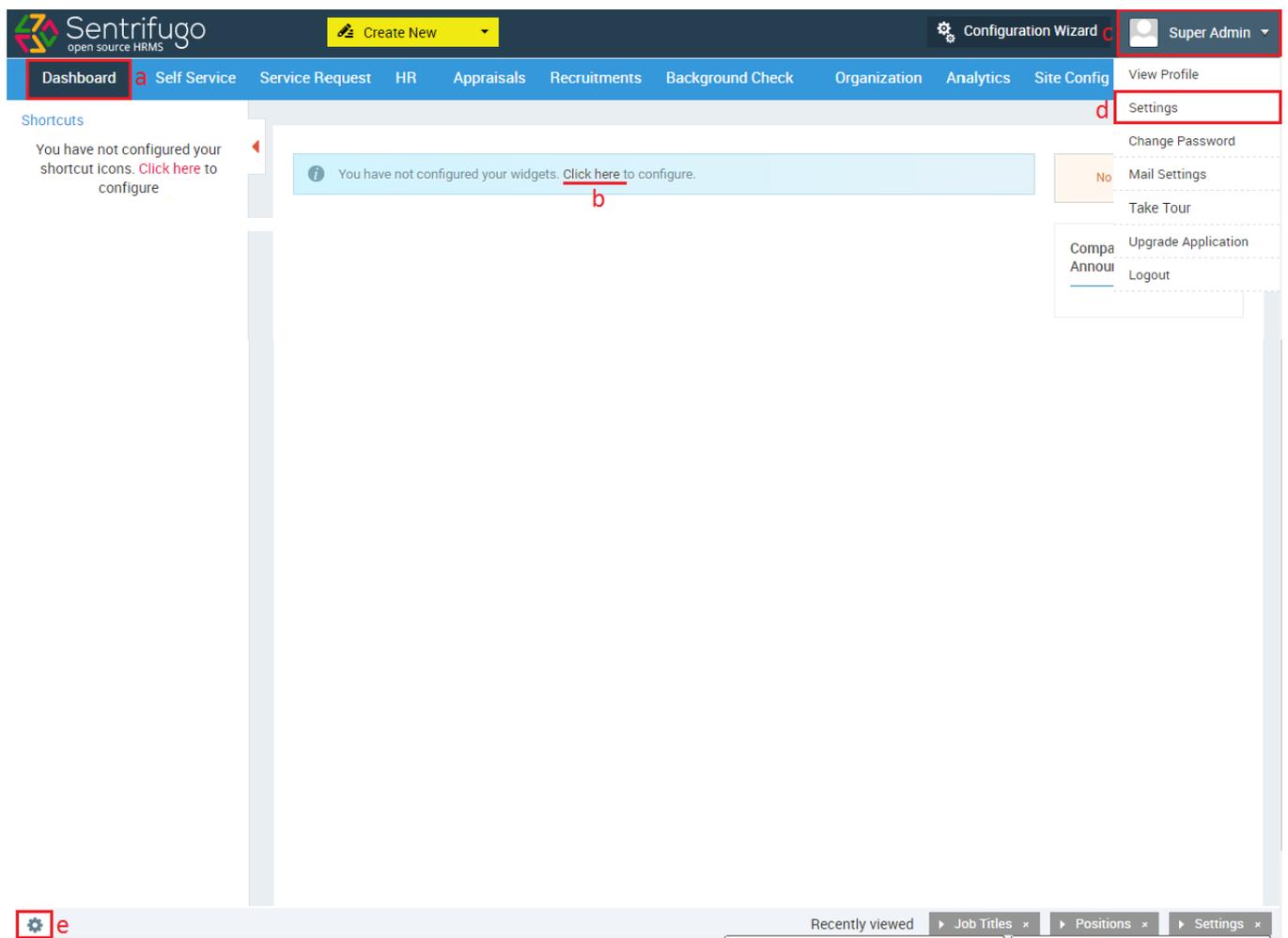


Figure 23

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.

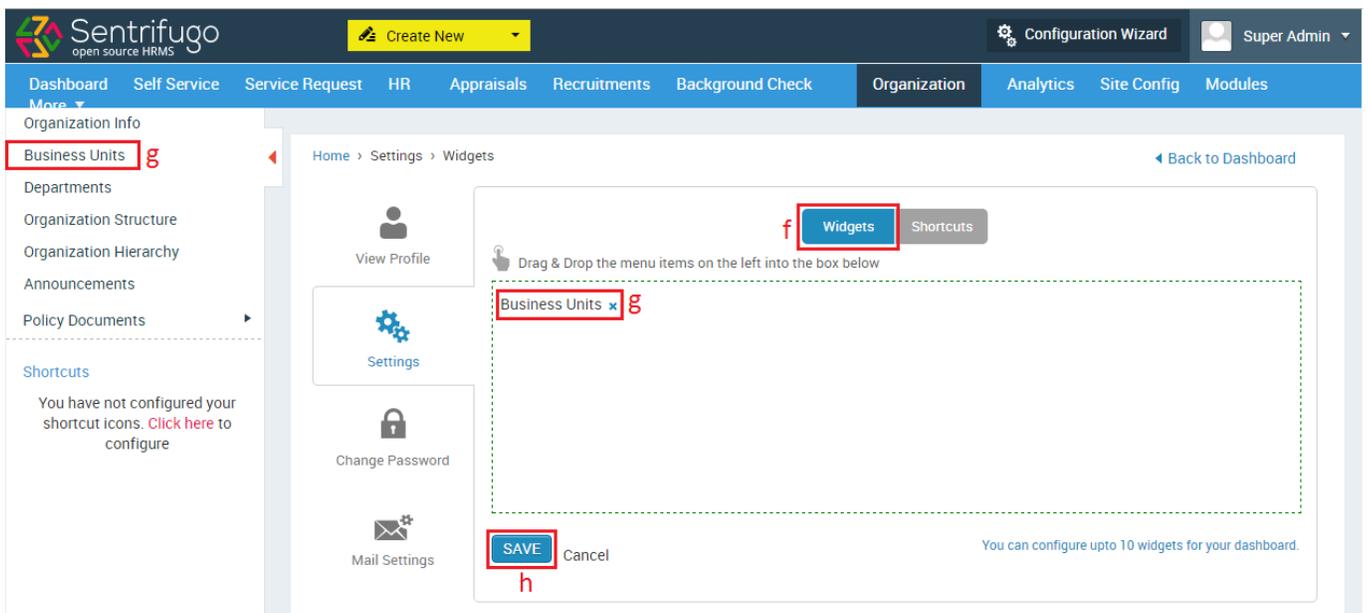


Figure 24

(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.

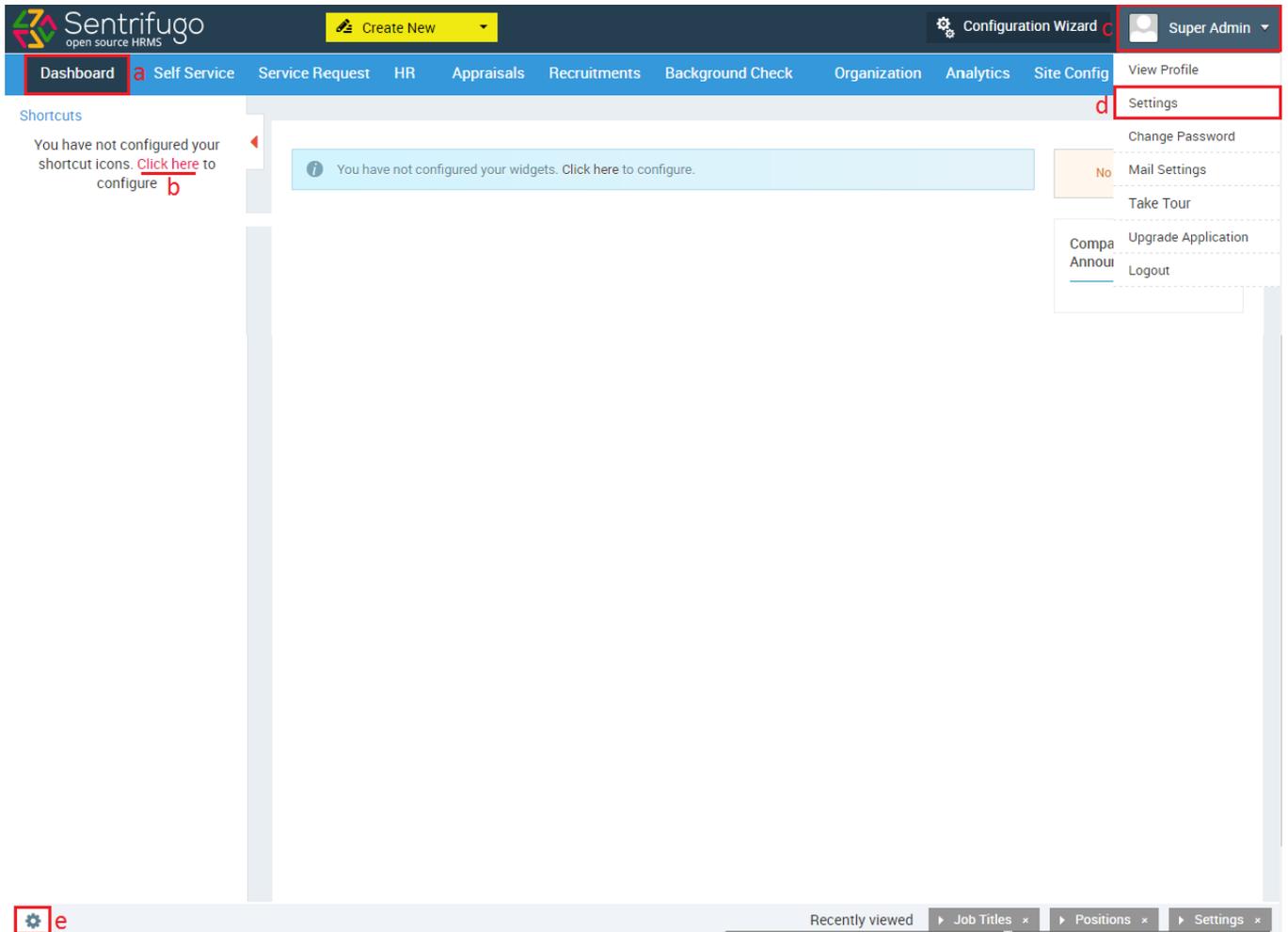


Figure 25

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.

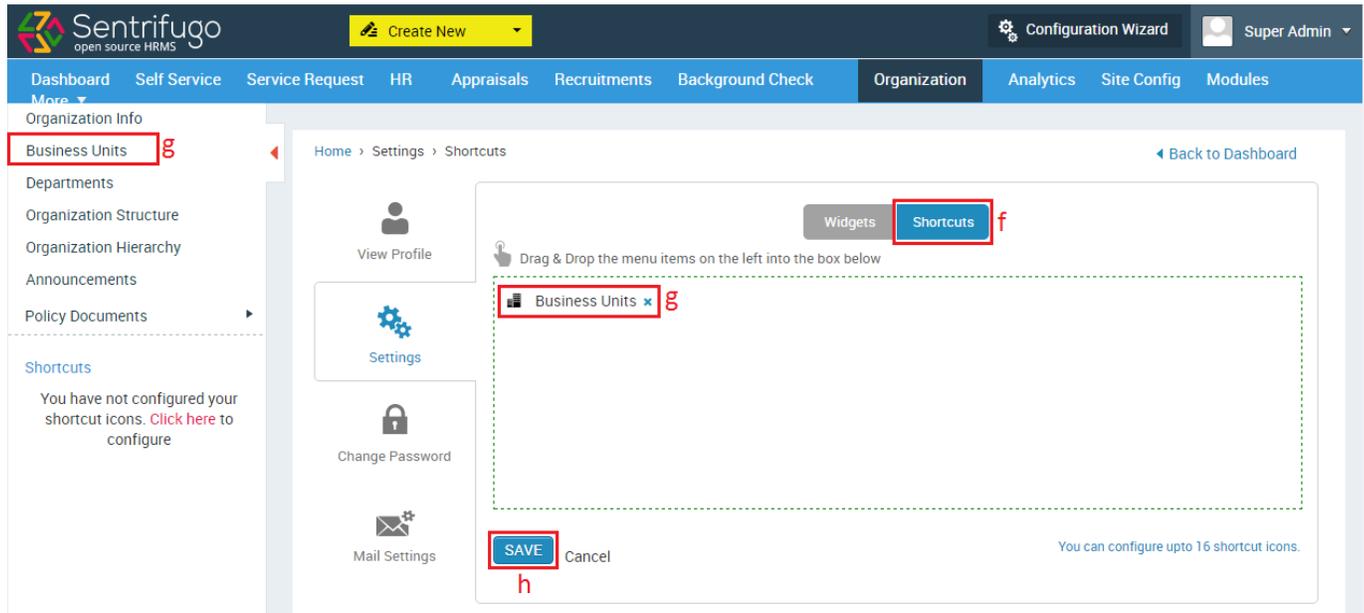


Figure 26

(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, refer 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

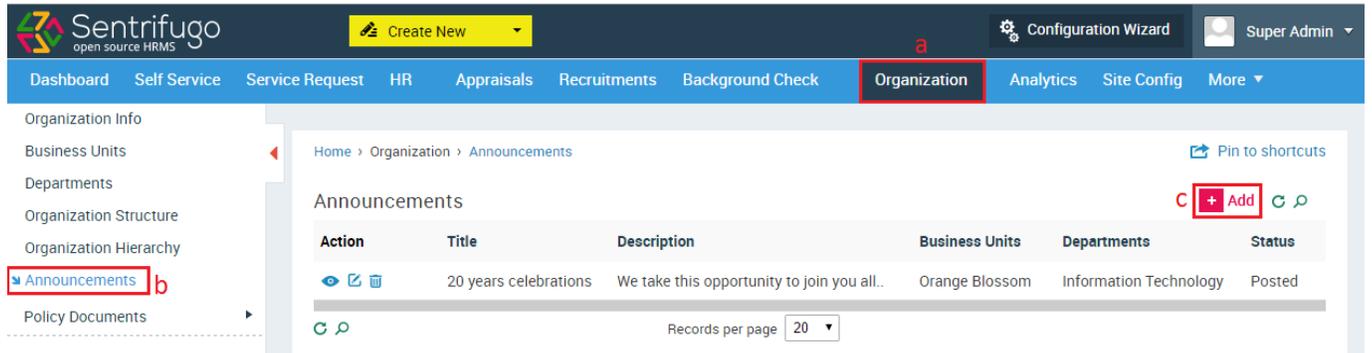


Click **cancel** to exit the Widgets/Shortcuts screen

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 '+ Add' button (highlighted with a red box and labeled 'c') is visible in the top right of the main content area. Below the button is a table with columns: Action, Title, Description, Business Units, Departments, and Status. The table contains one row: '20 years celebrations', 'We take this opportunity to join you all..', 'Orange Blossom', 'Information Technology', and 'Posted'. At the bottom of the table, there 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.

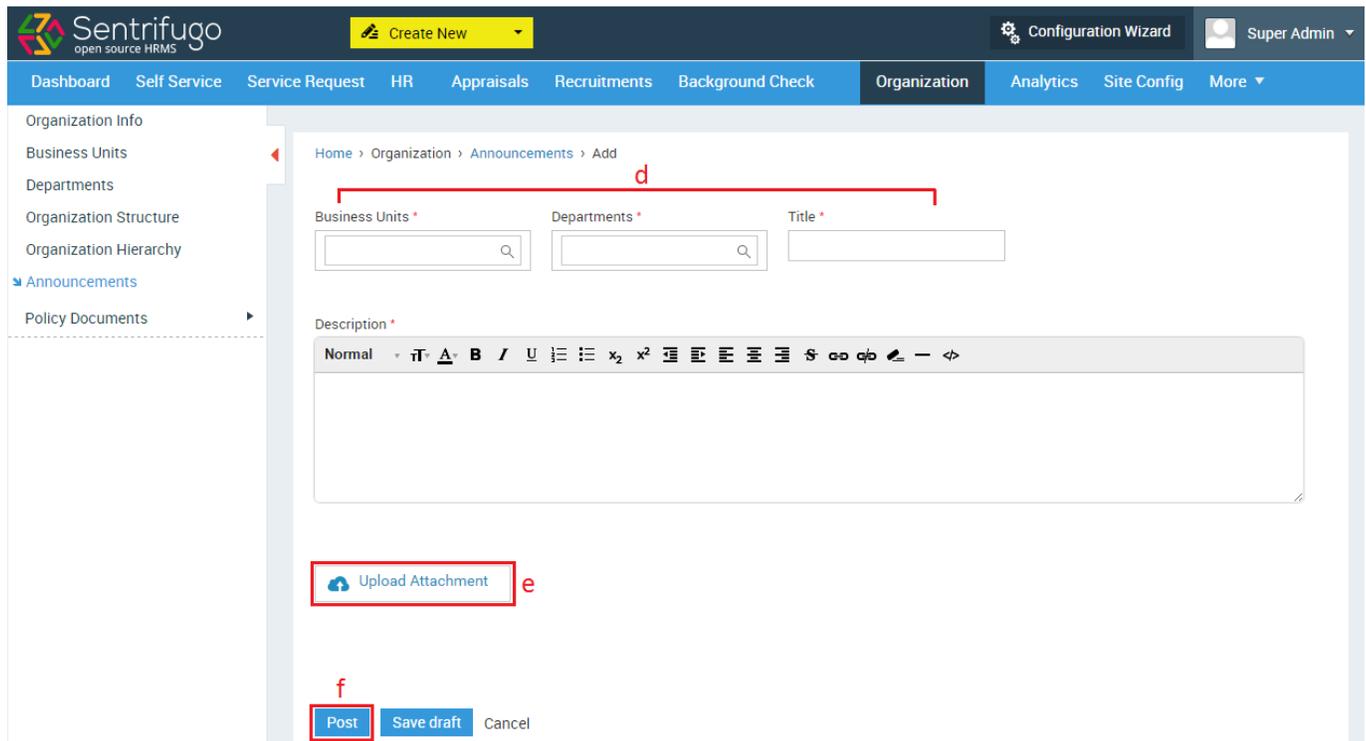


Figure 28

- 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.

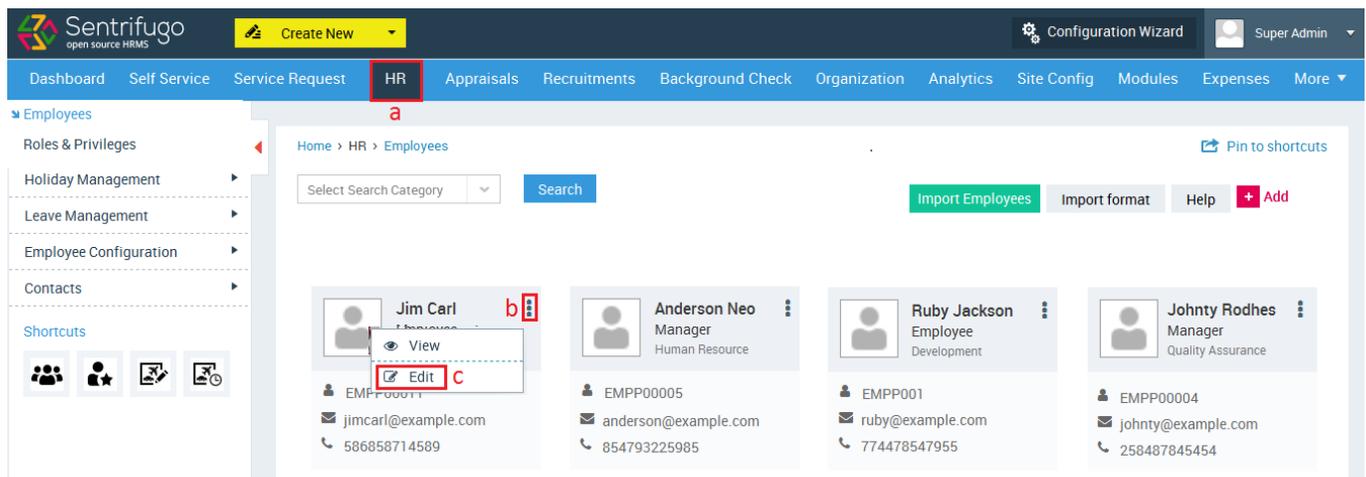
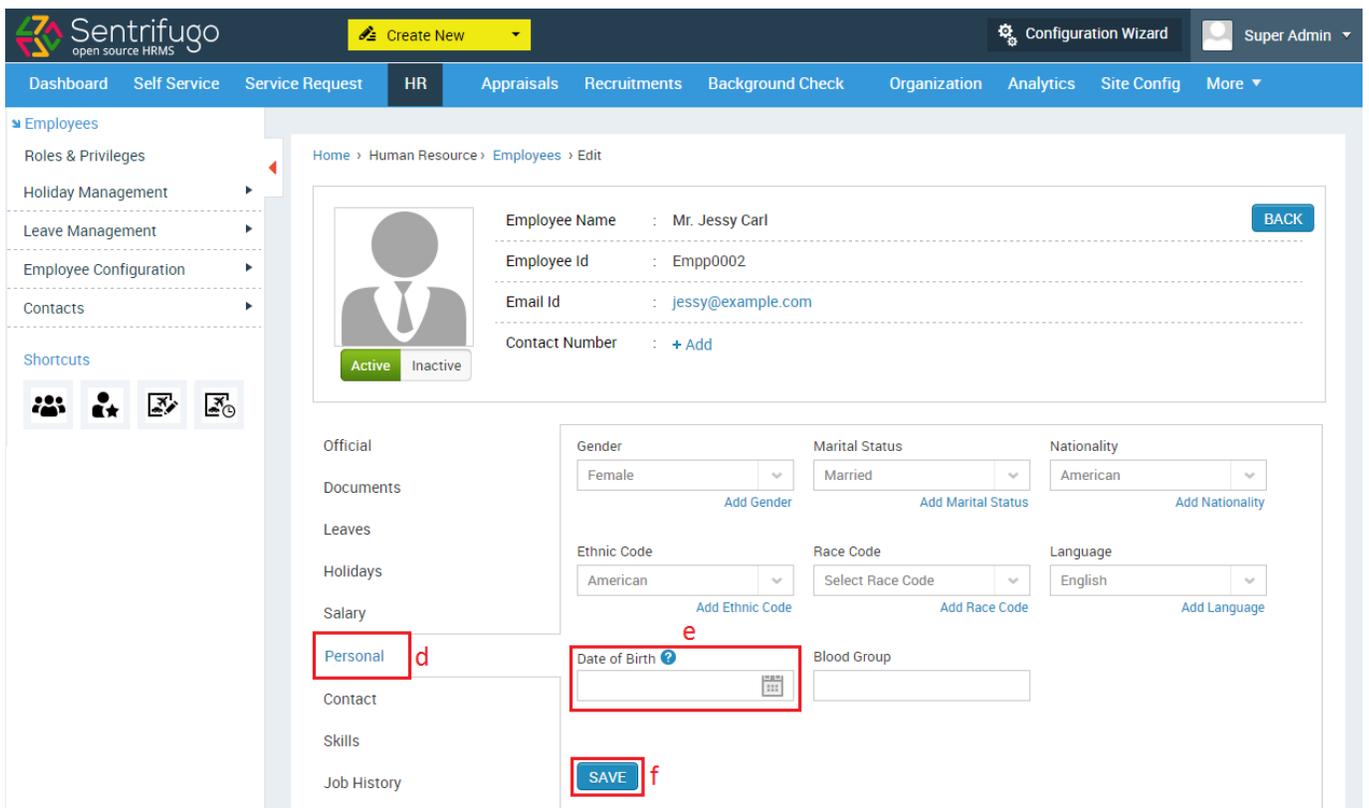


Figure 29

To add an employee's birthday:

- a. Click **HR** in the top menu
- b. Click **More Actions** icon
- 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 menu includes 'Employees', 'Roles & Privileges', 'Holiday Management', 'Leave Management', 'Employee Configuration', 'Contacts', and 'Shortcuts'. The main content area displays the 'Edit' page for an employee named Mr. Jessie Carl. The employee details include: Employee Name: Mr. Jessie Carl, Employee Id: Empp0002, Email Id: jessy@example.com, and Contact Number: + Add. The form below contains fields for Gender (Female), Marital Status (Married), Nationality (American), Ethnic Code (American), Race Code (Select Race Code), Language (English), Date of Birth, and Blood Group. The 'Personal' menu option on the left is highlighted with a red box and labeled 'd'. The 'Date of Birth' field is highlighted with a red box and labeled 'e'. The '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.

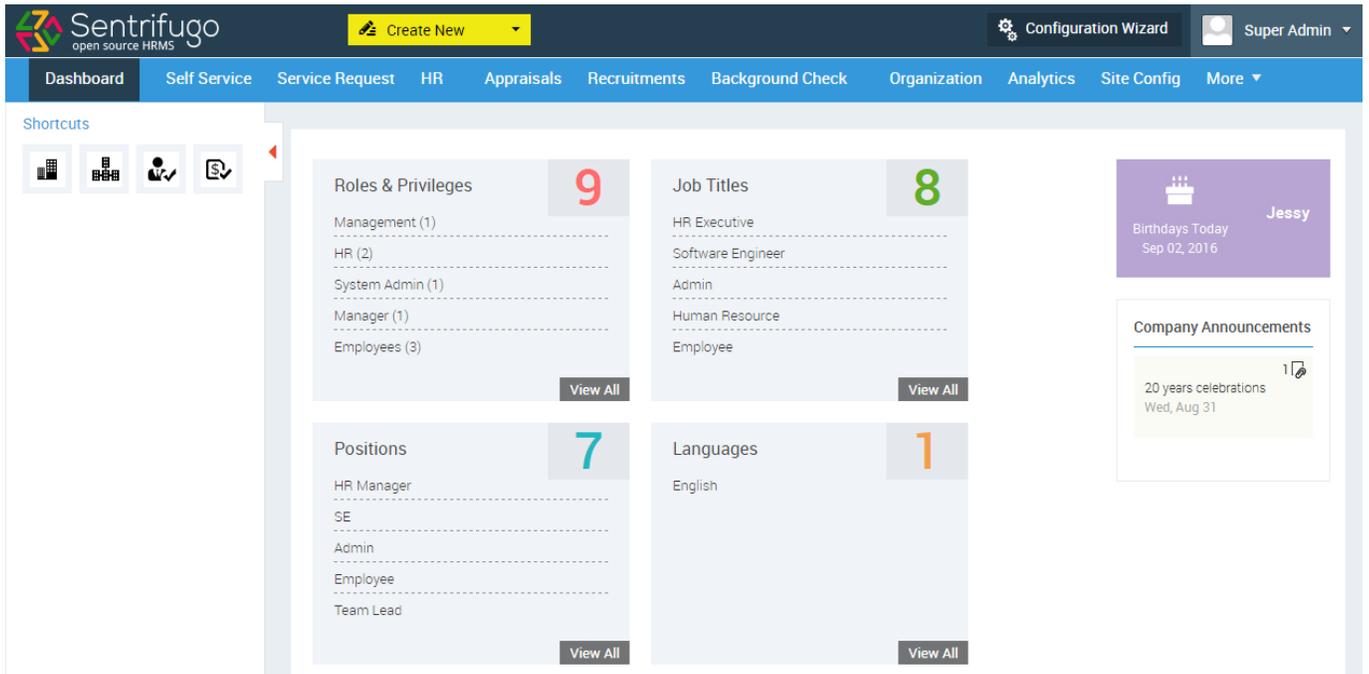


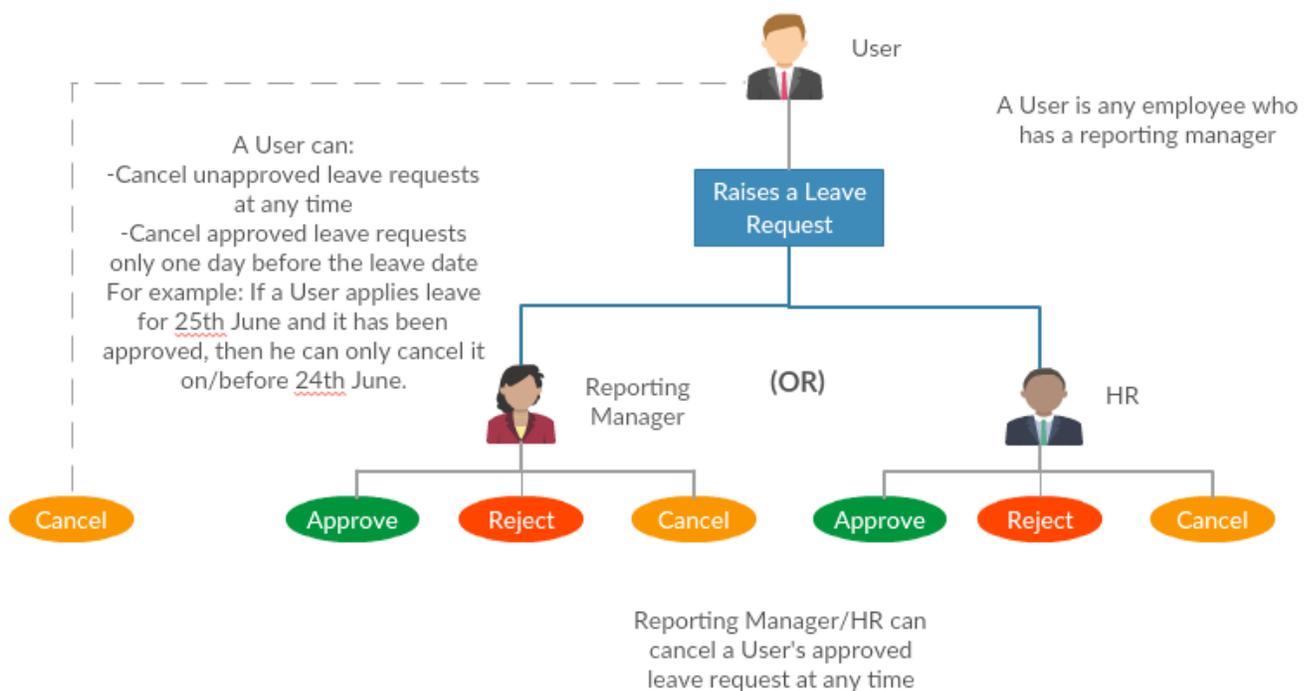
Figure 31



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/HR. Below is the leave management process flowchart.



Process Description:

- A User (Any User who has a reporting manager) raises a leave request.
- The User can cancel his leave request unapproved or approved (one day before the leave date)
- Either the Reporting Manager or HR can approve/reject/cancel (at any time) the leave request.



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.

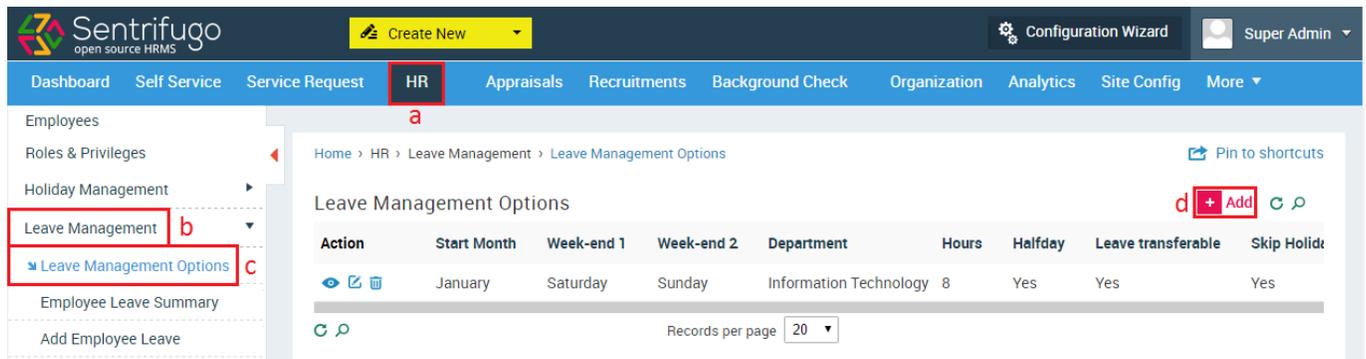


Figure 32

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.

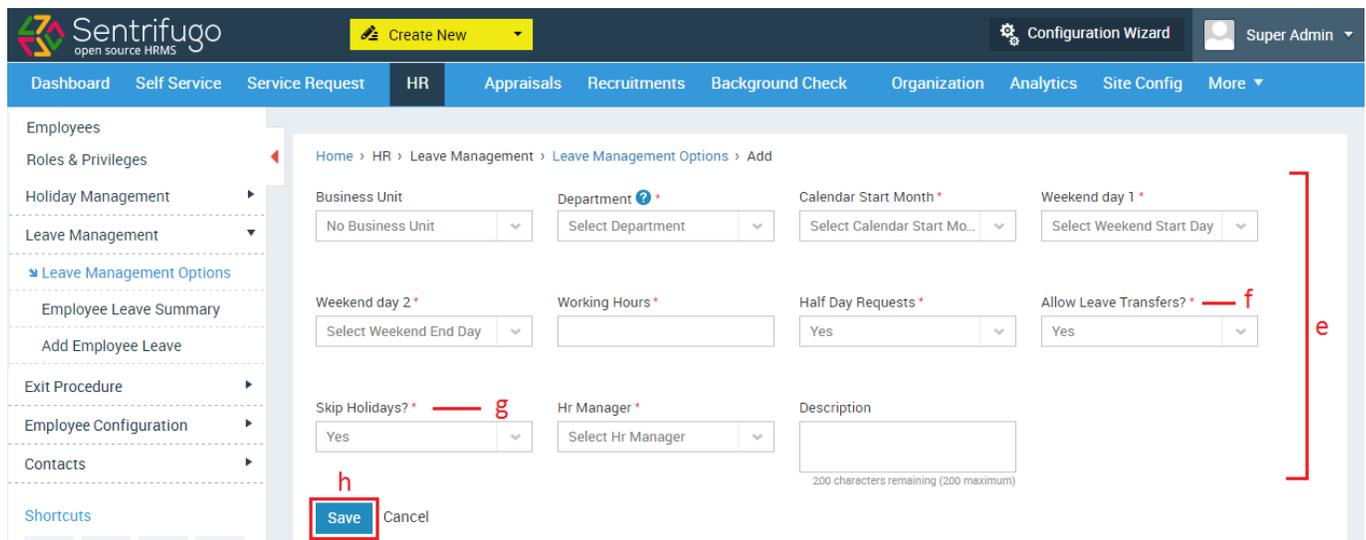


Figure 33

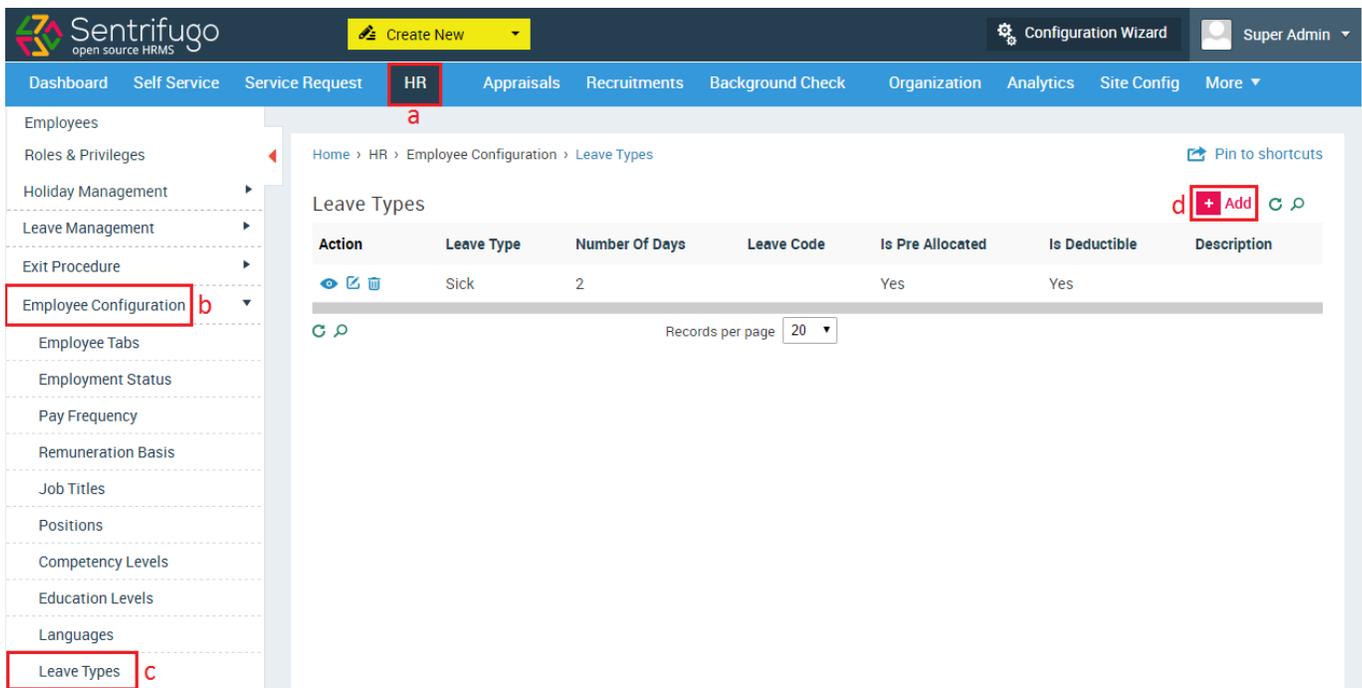
- e. Fill in the required details
- f. **Allow Leave Transfers:** If there are any unused leaves for an employee in the current year, then by using this option they will be carried forward to the next year
- g. **Skip Holidays:** If a user applies for a vacation which includes any pre-declared holiday, then by using this option, holiday 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.

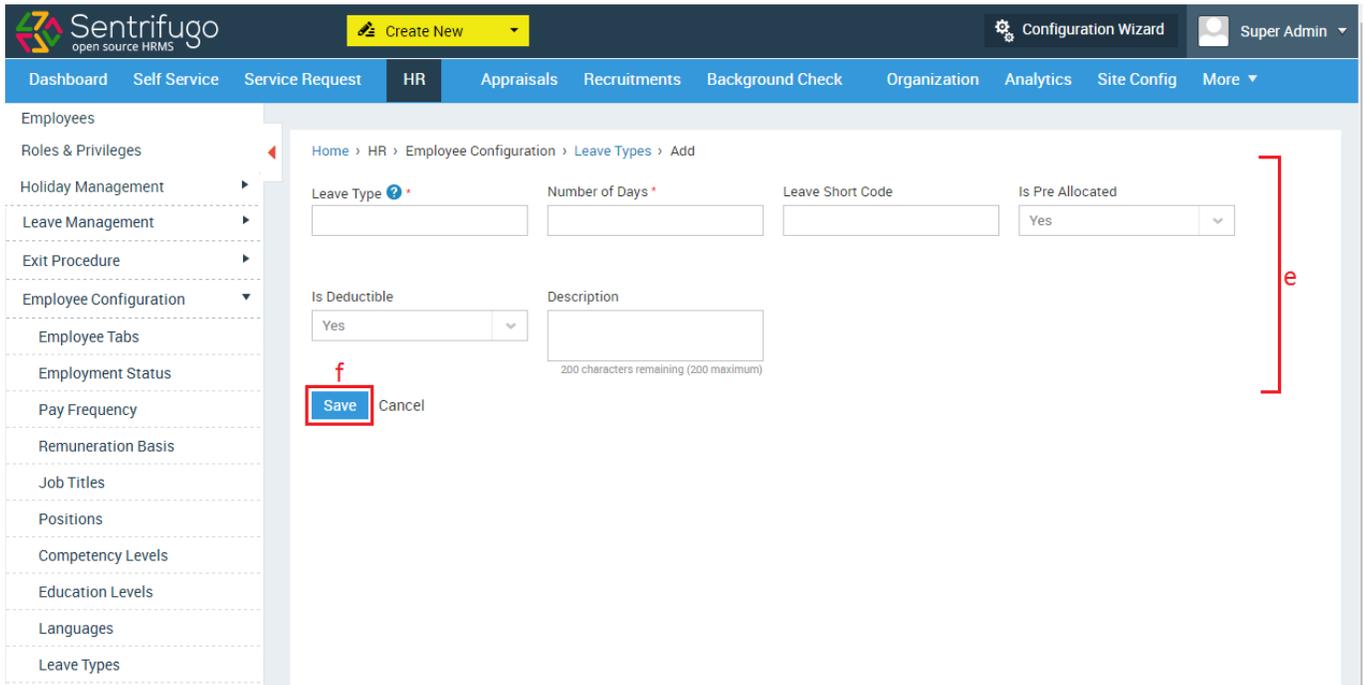


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR' (highlighted with 'a'), 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar contains 'Employees', 'Roles & Privileges', 'Holiday Management', 'Leave Management', 'Exit Procedure', 'Employee Configuration' (highlighted with 'b'), 'Employee Tabs', 'Employment Status', 'Pay Frequency', 'Remuneration Basis', 'Job Titles', 'Positions', 'Competency Levels', 'Education Levels', 'Languages', and 'Leave Types' (highlighted with 'c'). The main content area shows the 'Leave Types' configuration page. The breadcrumb is 'Home > HR > Employee Configuration > Leave Types'. There is a 'Pin to shortcuts' button. Below the breadcrumb is the 'Leave Types' title and an '+ Add' button (highlighted with 'd'). A table with columns 'Action', 'Leave Type', 'Number Of Days', 'Leave Code', 'Is Pre Allocated', 'Is Deductible', and 'Description' is shown. One row is visible for 'Sick' leave with 2 days, pre-allocated, and deductible. Below the table is a 'Records per page' dropdown set to 20.

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 'Employee Configuration' expanded to show 'Leave Types'. The main content area is titled 'Home > HR > Employee Configuration > Leave Types > Add'. The form contains the following fields:

- Leave Type**: Text input field with a help icon.
- Number of Days**: Text input field.
- Leave Short Code**: Text input field.
- Is Pre Allocated**: Dropdown menu with 'Yes' selected.
- Is Deductible**: Dropdown menu with 'Yes' selected.
- Description**: Text area with a character count: '200 characters remaining (200 maximum)'. A red 'f' is above this field.

At the bottom of the form are 'Save' and 'Cancel' buttons. A red box highlights the 'Save' button, and 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

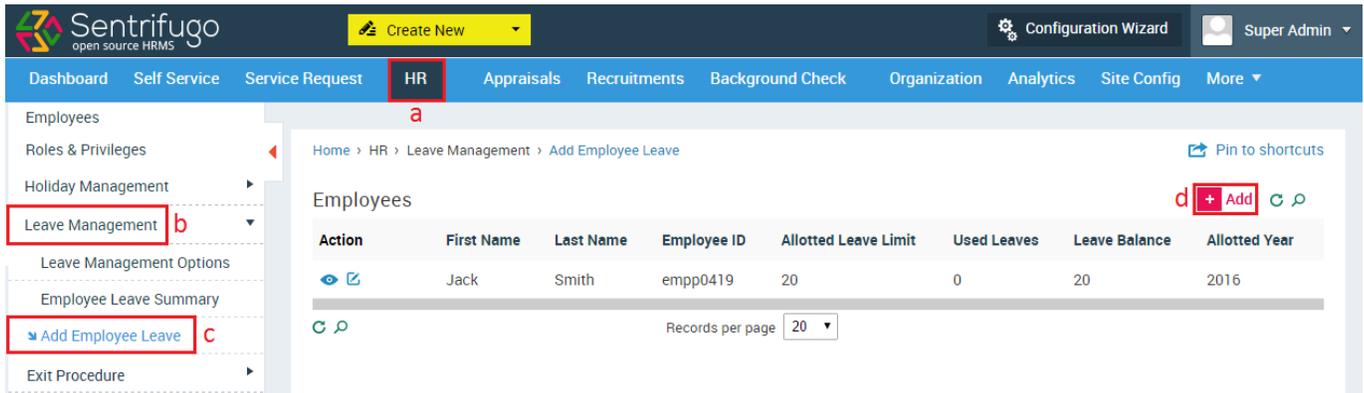


Figure 36

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

Please refer Figure 37

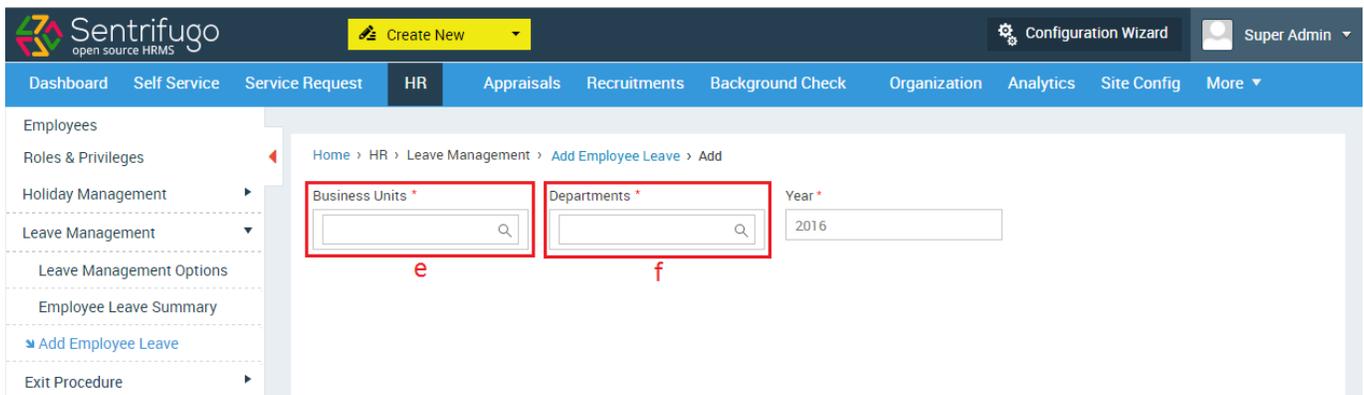


Figure 37

- 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

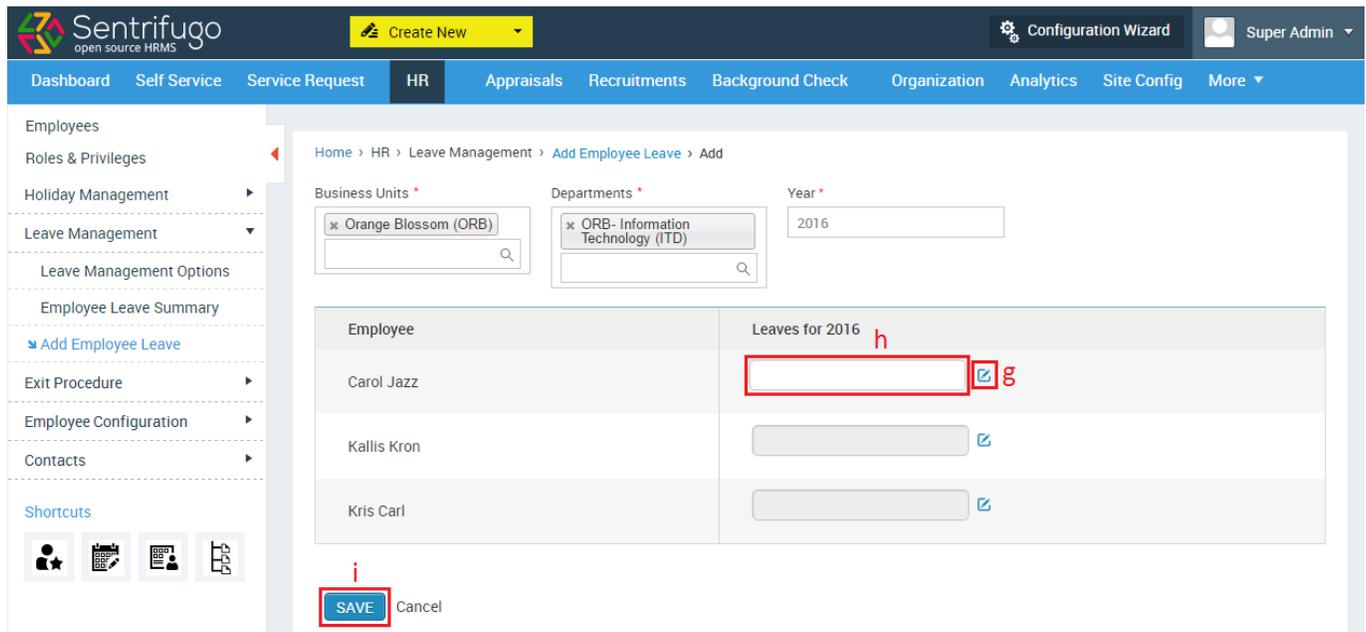


Figure 38

- 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

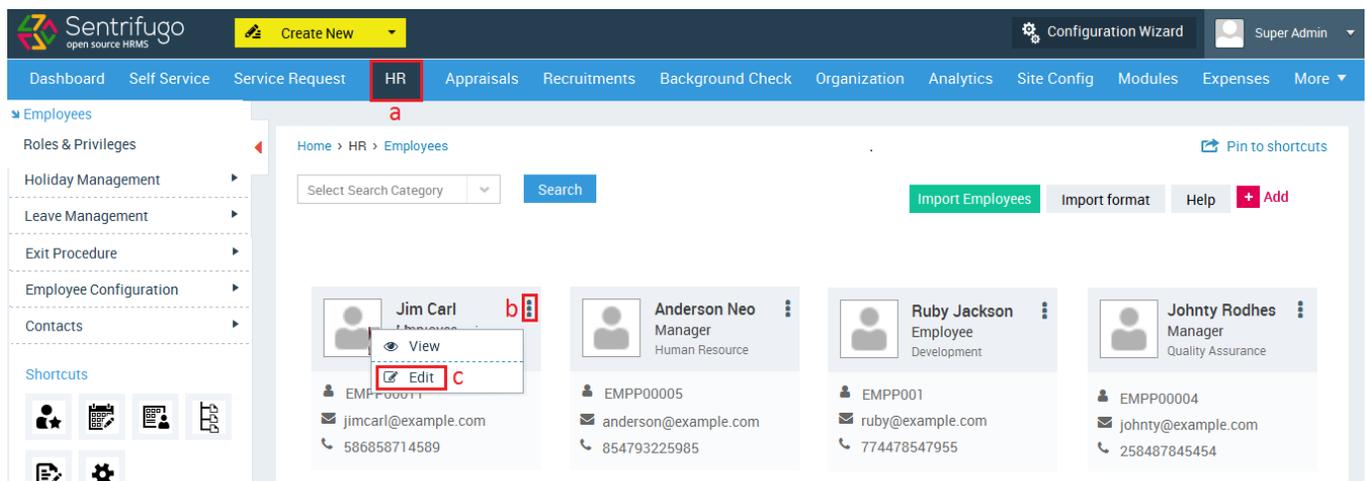
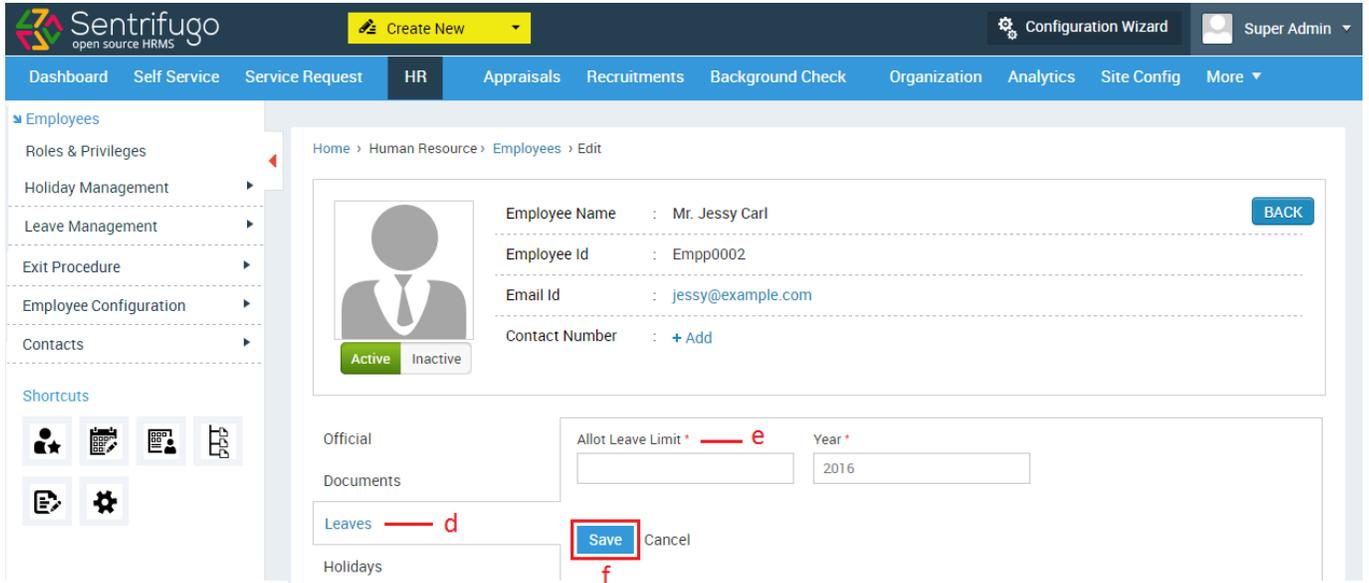


Figure 39

- a. Click **HR** in the top menu
- b. Click **More Actions** icon

- c. Click **Edit** icon

Please refer Figure 40



Home > Human Resource > Employees > Edit

Employee Name : Mr. Jessie Carl BACK

Employee Id : Empp0002

Email Id : jessy@example.com

Contact Number : + Add

Official Allot Leave Limit * e Year *

Documents

Leaves d Save Cancel f

Holidays

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

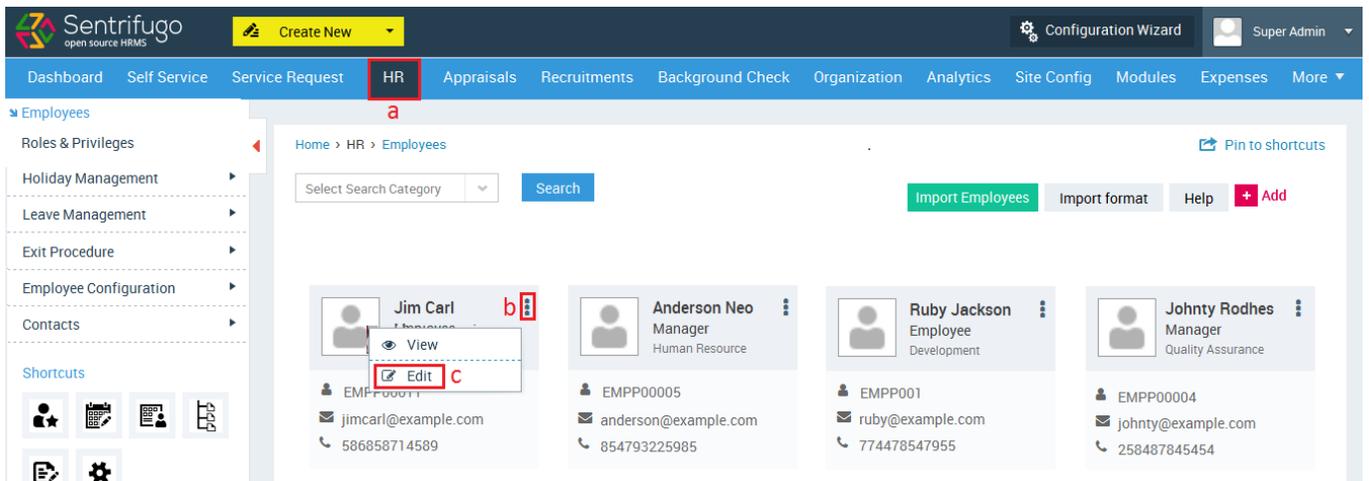


Figure 41

- a. Click **HR** in the top menu
- b. Click **More Actions** icon
- c. Click **Edit** icon

Please refer Figure 42

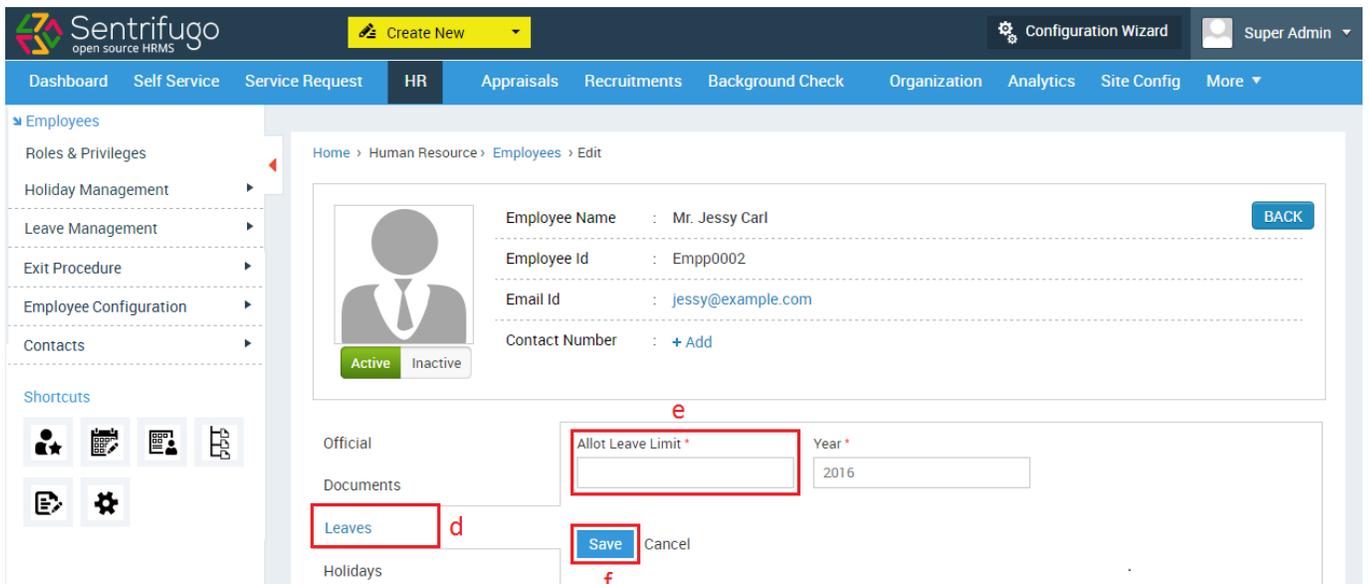


Figure 42

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

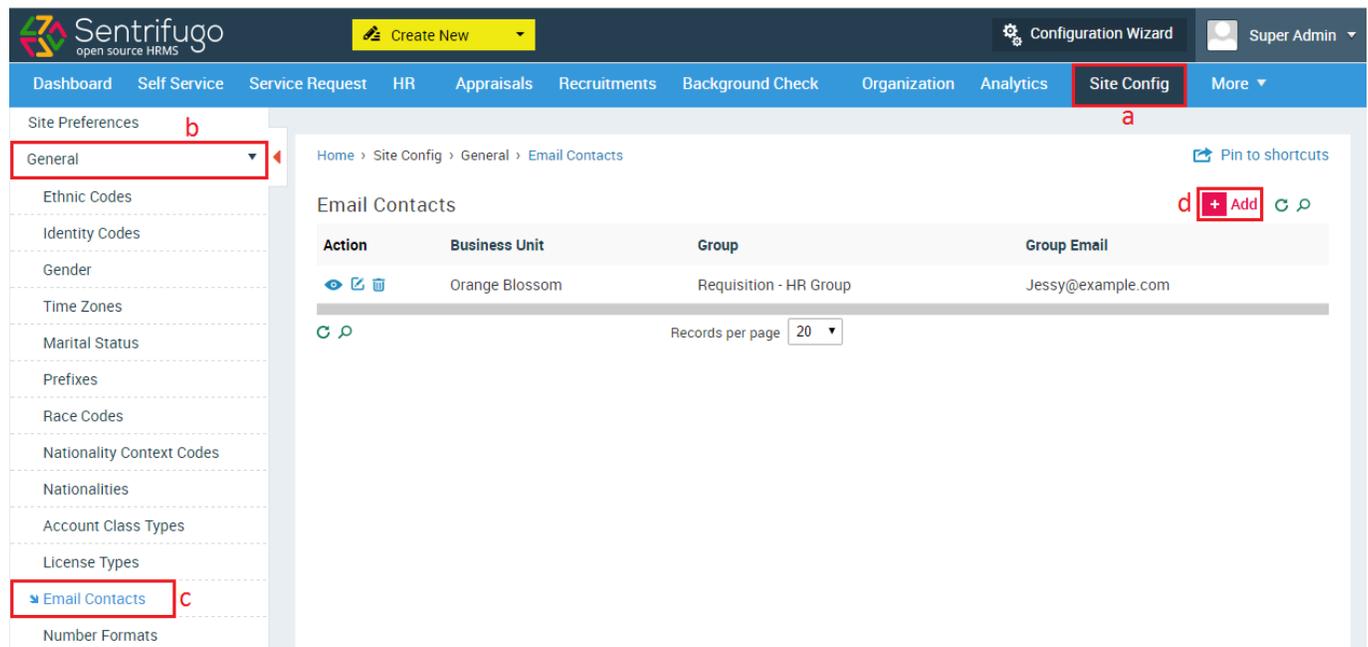


Figure 43

- 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

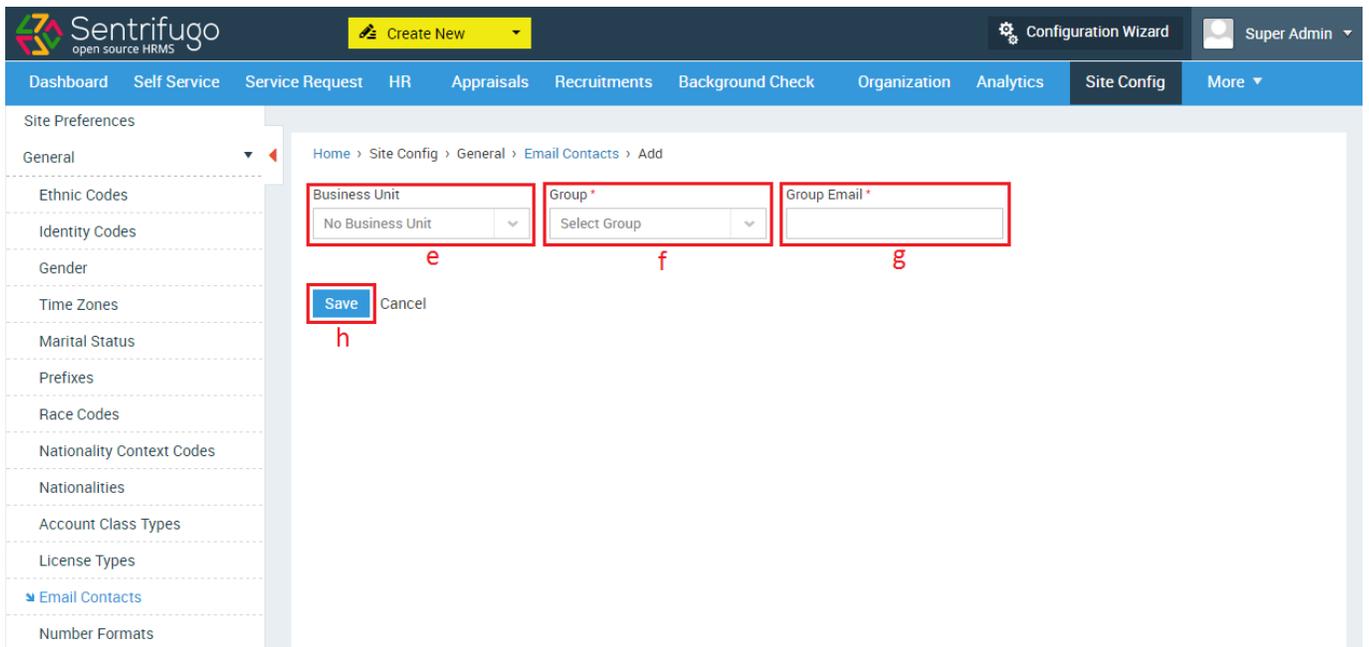


Figure 44

- 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.**

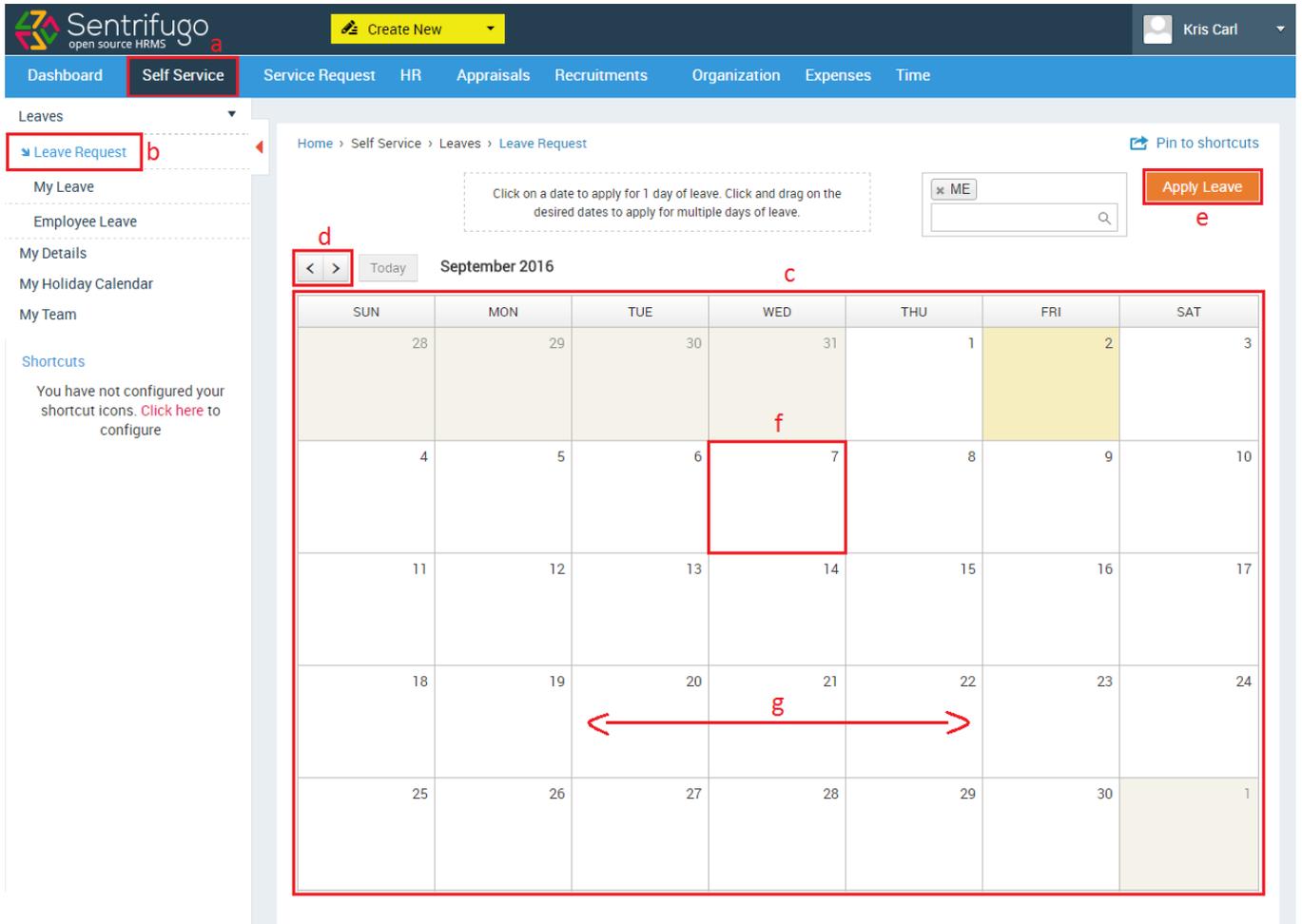
3.6 How do I raise a Leave Request?

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



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 'Self Service' menu is active. The left sidebar shows 'Leaves' with 'Leave Request' selected. The main content area displays a calendar for September 2016. A red box highlights the calendar area, and various annotations are present: 'a' points to 'Self Service', 'b' to 'Leave Request', 'c' to the calendar header, 'd' to the navigation arrows, 'e' to the 'Apply Leave' button, 'f' to a date on the calendar, and 'g' to a range selection arrow.

Figure 45

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

After **e/f/g** 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

i

Apply

Cancel

h

Figure 46

- h. Enter the required details
- i. 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 Leave

Employee Leave

My Details

My Holiday Calendar

My Team

Shortcuts

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

Pending Leaves

1

Cancel Leaves

0

Approved Leaves

0

Rejected Leaves

0

All

1

My Leave 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

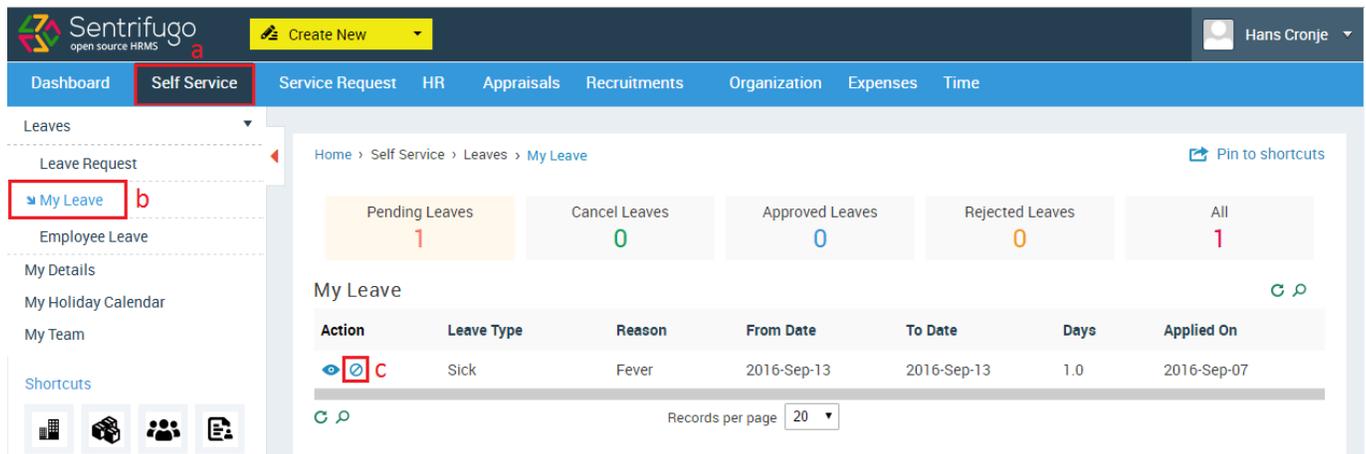


Figure 48

- a. Click **Self Service** in the top menu bar
- b. Click **My Leave** in the submenu
- c. Click **Cancel** icon in the Action column

A confirmation message will be displayed

Please refer Figure 49

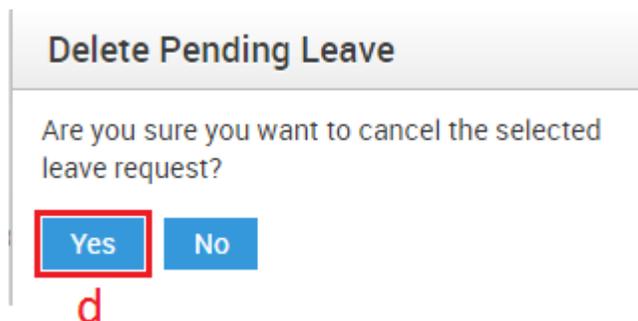


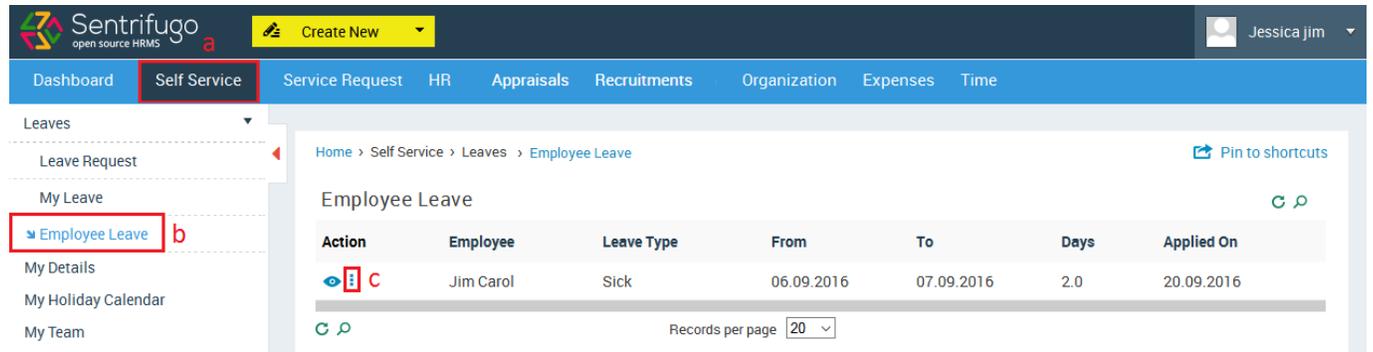
Figure 49

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

You can view your cancelled leaves in **Self Service > Leaves > My Leaves > Cancelled 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 'Self Service' menu is expanded, showing 'Leaves', 'Leave Request', 'My Leave', 'Employee Leave', 'My Details', 'My Holiday Calendar', and 'My Team'. The 'Employee Leave' page is displayed, showing a table with the following data:

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

Records per page: 20

Figure 50

- a. Click **Self Service** in the top menu bar
- b. Click **Employee Leave** on the left side panel
- c. Click **More Action** button in the Action column

A small pop up window will open.

Please refer Figure 51

Leaverequest ✕

Status — d

Cancel
▼

Comments

50 characters remaining (50 maximum)

SAVE e

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	

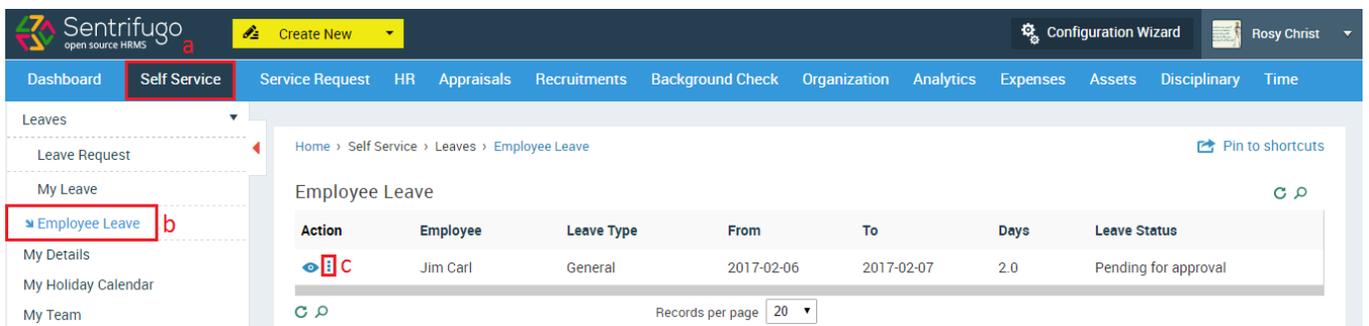
Figure 51

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

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

The HR and Employees’ reporting managers will have the privilege to approve/reject leave requests.

Please refer Figure 52



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service' (highlighted with a red box 'a'), 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Expenses', 'Assets', 'Disciplinary', and 'Time'. The left sidebar shows 'Leaves' expanded, with 'Employee Leave' selected (highlighted with a red box 'b'). The main content area displays 'Employee Leave' details for Jim Carl, including a table with the following data:

Action	Employee	Leave Type	From	To	Days	Leave Status
i c	Jim Carl	General	2017-02-06	2017-02-07	2.0	Pending for approval

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 **Employee Leave** in the submenu
- c. Click **More Actions** button in the Action column

A small pop up window will open.

Please refer Figure 53

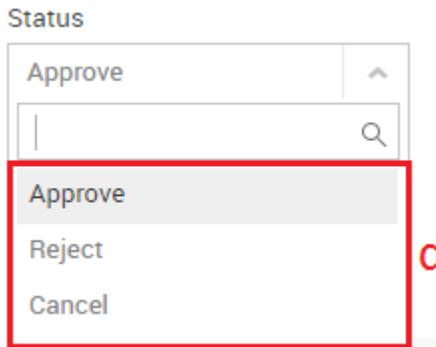


Figure 53

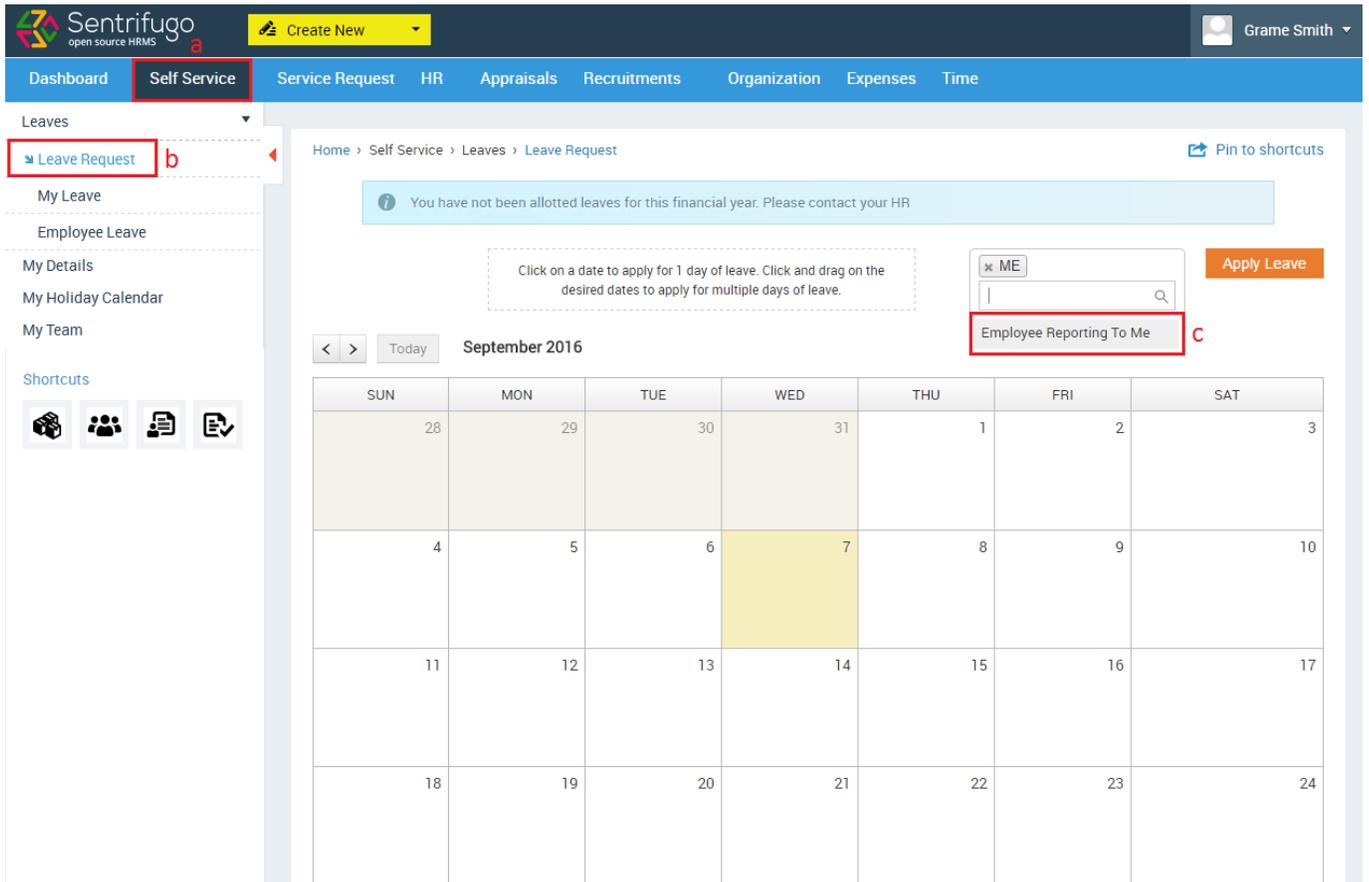
- d. Select the status

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.

ME

Employee Reporting To Me

Apply Leave

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 **Leave Request** in the submenu
- c. 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

< > Today 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

Click here



Leaverequest x

Status

Comments

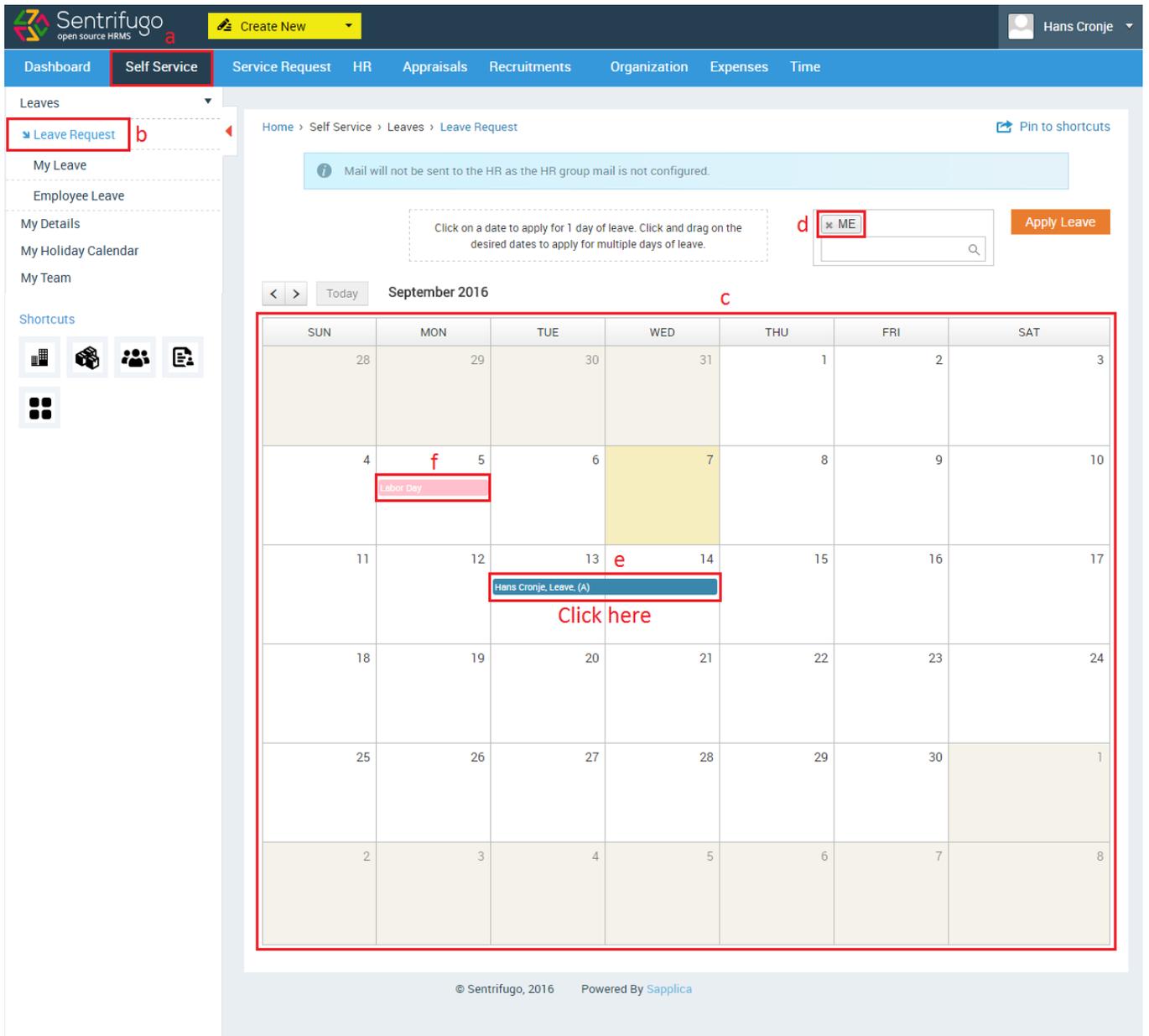
50 characters remaining (50 maximum)

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 'Self Service' menu is active. The left sidebar shows 'Leaves' with 'Leave Request' selected. The main content area displays a calendar for September 2016. A search dropdown is set to 'ME'. A calendar entry for September 13th shows 'Hans Cronje, Leave, (A)' with a 'Click here' label. A 'Labor Day' holiday is also visible on September 5th.

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

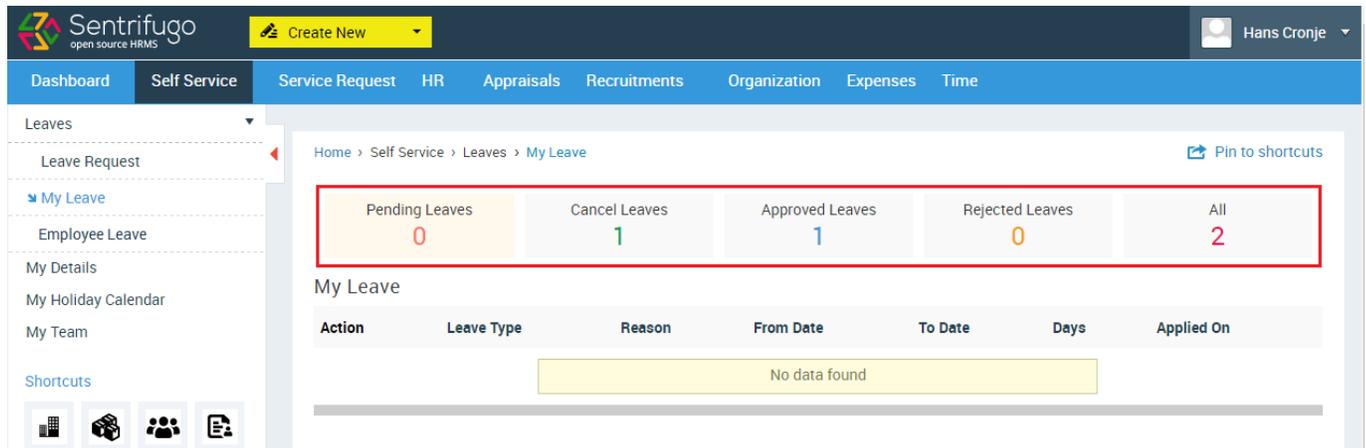
Figure 56

- Click **Self Service** in the top menu
- Click **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.
- 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 user is logged in as Hans Cronje. The navigation menu includes Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. The 'Leaves' section is expanded, showing options for Leave Request, My Leave, Employee Leave, My Details, My Holiday Calendar, and My Team. The 'My Leave' page displays a summary of leave status:

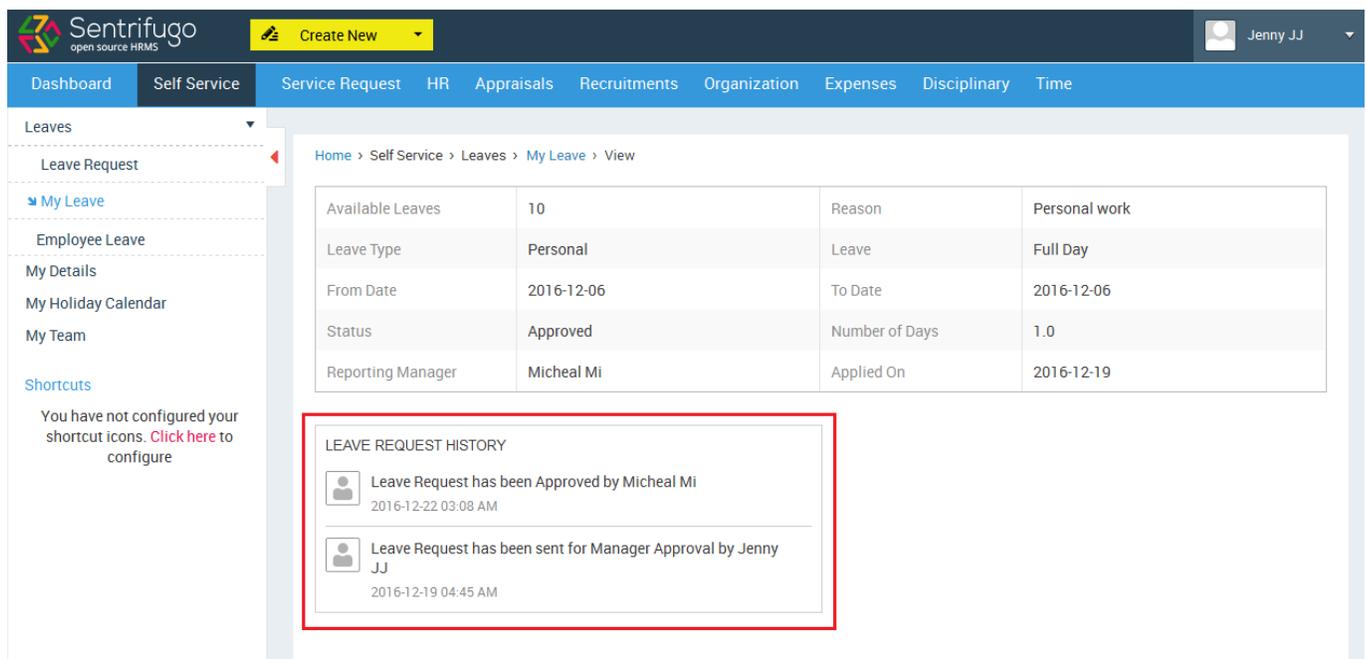
Pending Leaves	Cancel Leaves	Approved Leaves	Rejected Leaves	All
0	1	1	0	2

Below the summary is a table for 'My Leave' with columns: 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. The user is logged in as Jenny JJ. The navigation menu includes Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses, Disciplinary, and Time. The 'Leaves' section is expanded, showing options for Leave Request, My Leave, Employee Leave, My Details, My Holiday Calendar, and My Team. The 'My Leave' page displays a summary of the leave request:

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 'LEAVE REQUEST HISTORY' section with a list of actions:

- 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

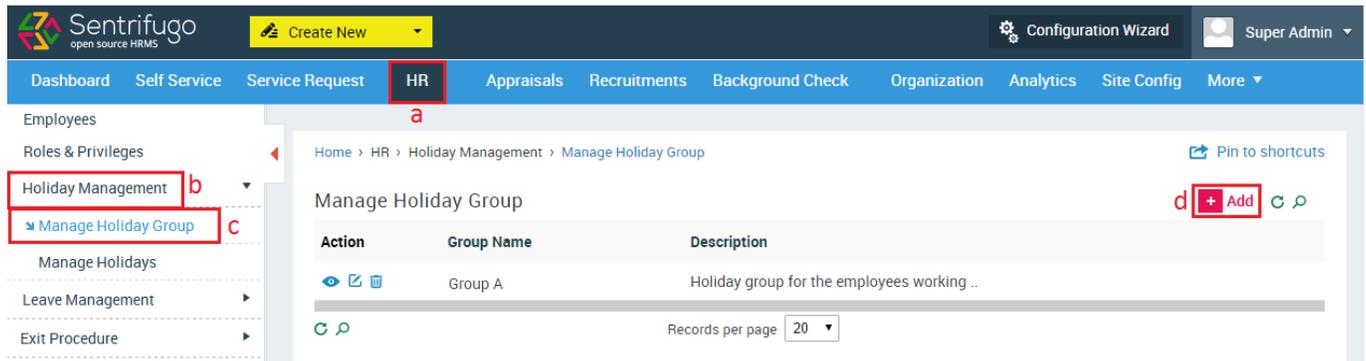


Figure 58

- 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

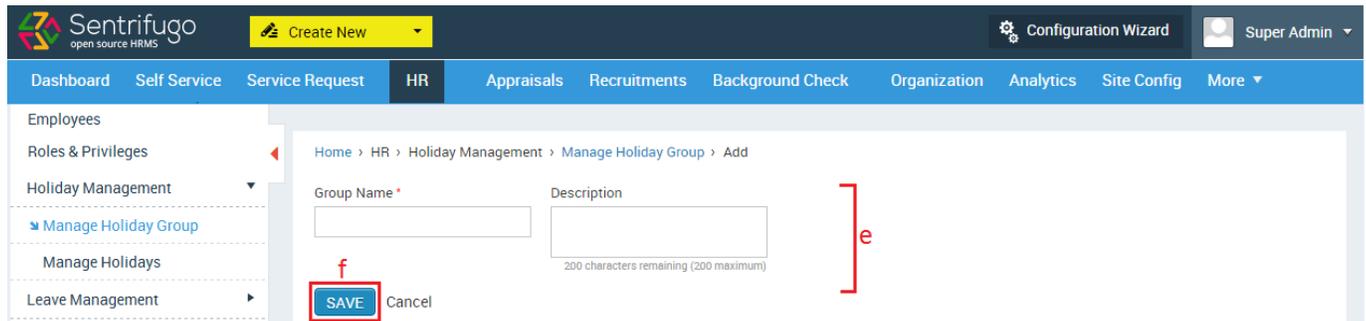


Figure 59

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

3.12 How do I create Holidays?

Please refer Figure 60

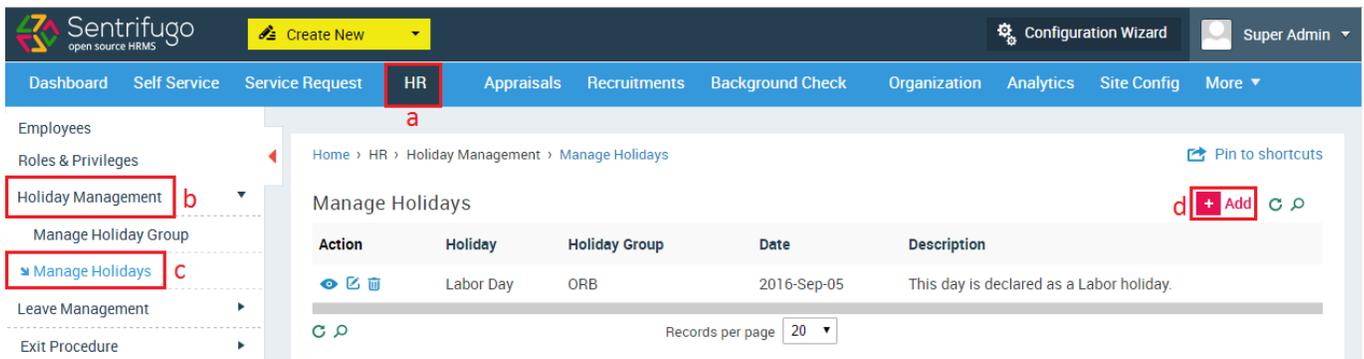


Figure 60

- 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

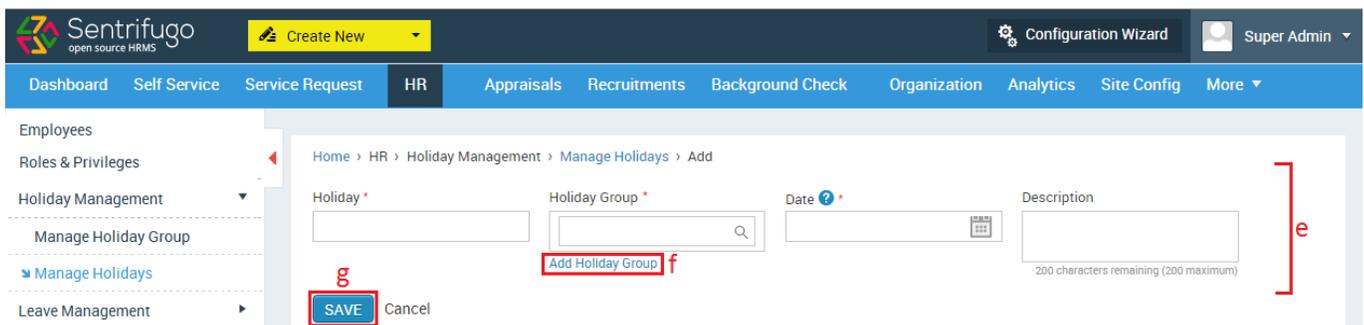


Figure 61

- 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

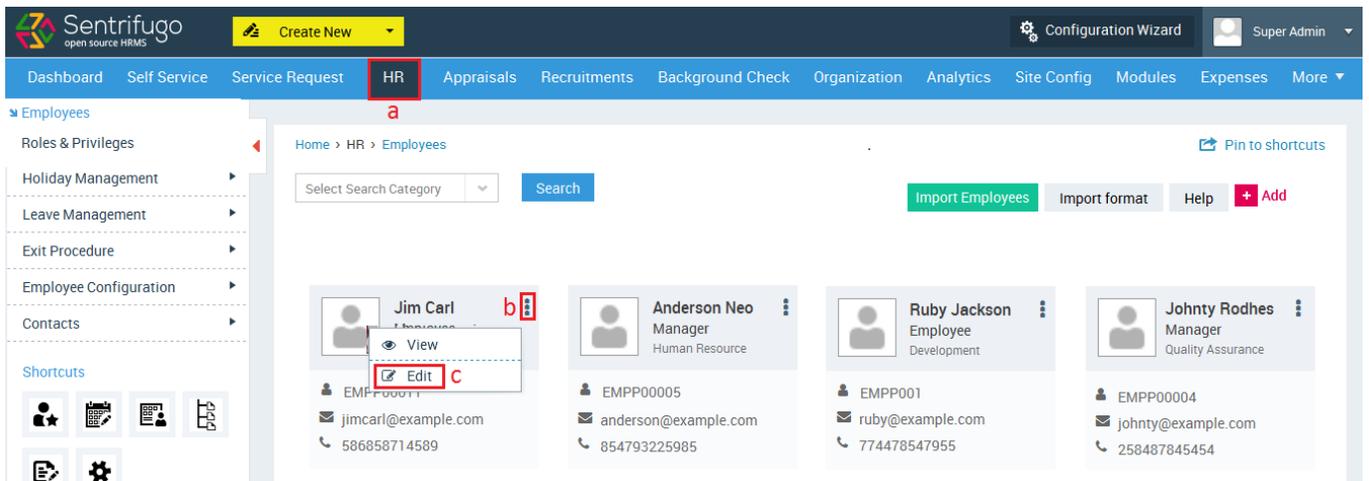


Figure 62

- a. Click **HR** in the top menu
- b. Click **More Actions** button in the Action column
- c. Click **Edit** icon

Please refer Figure 63

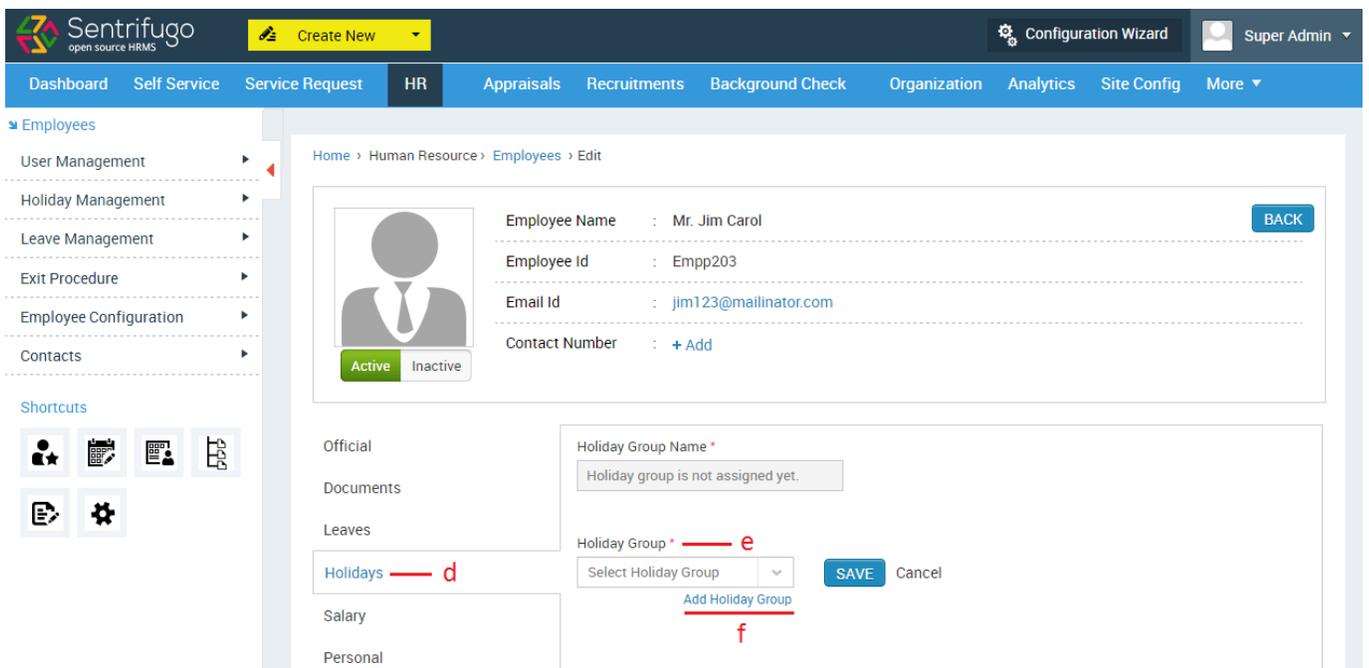
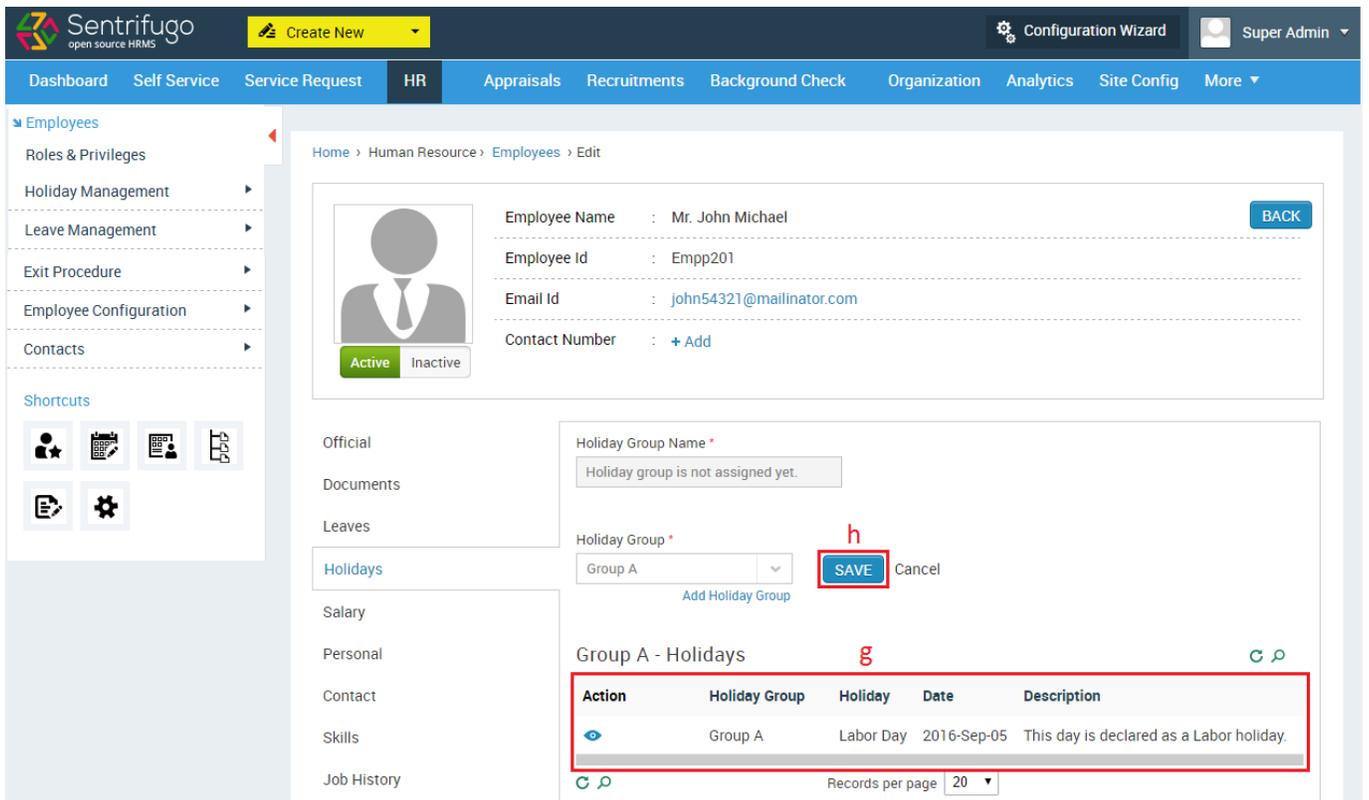


Figure 63

- 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 like 'Roles & Privileges', 'Holiday Management', 'Leave Management', 'Exit Procedure', 'Employee Configuration', and 'Contacts'. The main content area shows the 'Edit' page for an employee named Mr. John Michael (Employee Id: Empp201, Email: john54321@mailinator.com). Below the employee details, there is a section for 'Holidays' where a holiday group 'Group A' is selected. A 'SAVE' button is highlighted with a red box and labeled 'h'. Below this, a table titled 'Group A - Holidays' is displayed, containing one record for 'Labor Day' on '2016-Sep-05' with the description 'This day is declared as a Labor holiday.' The table is also highlighted with a red box and labeled 'g'.

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/she 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*

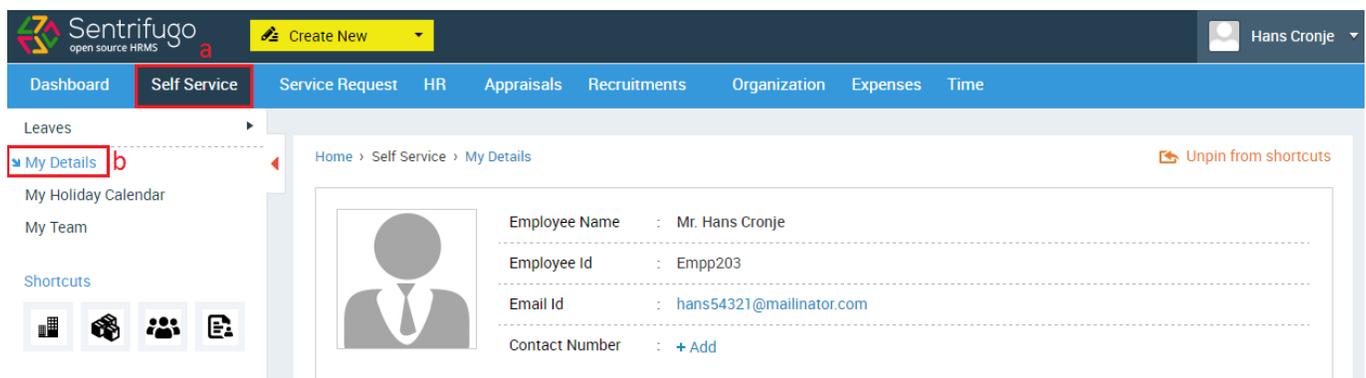


Figure 65

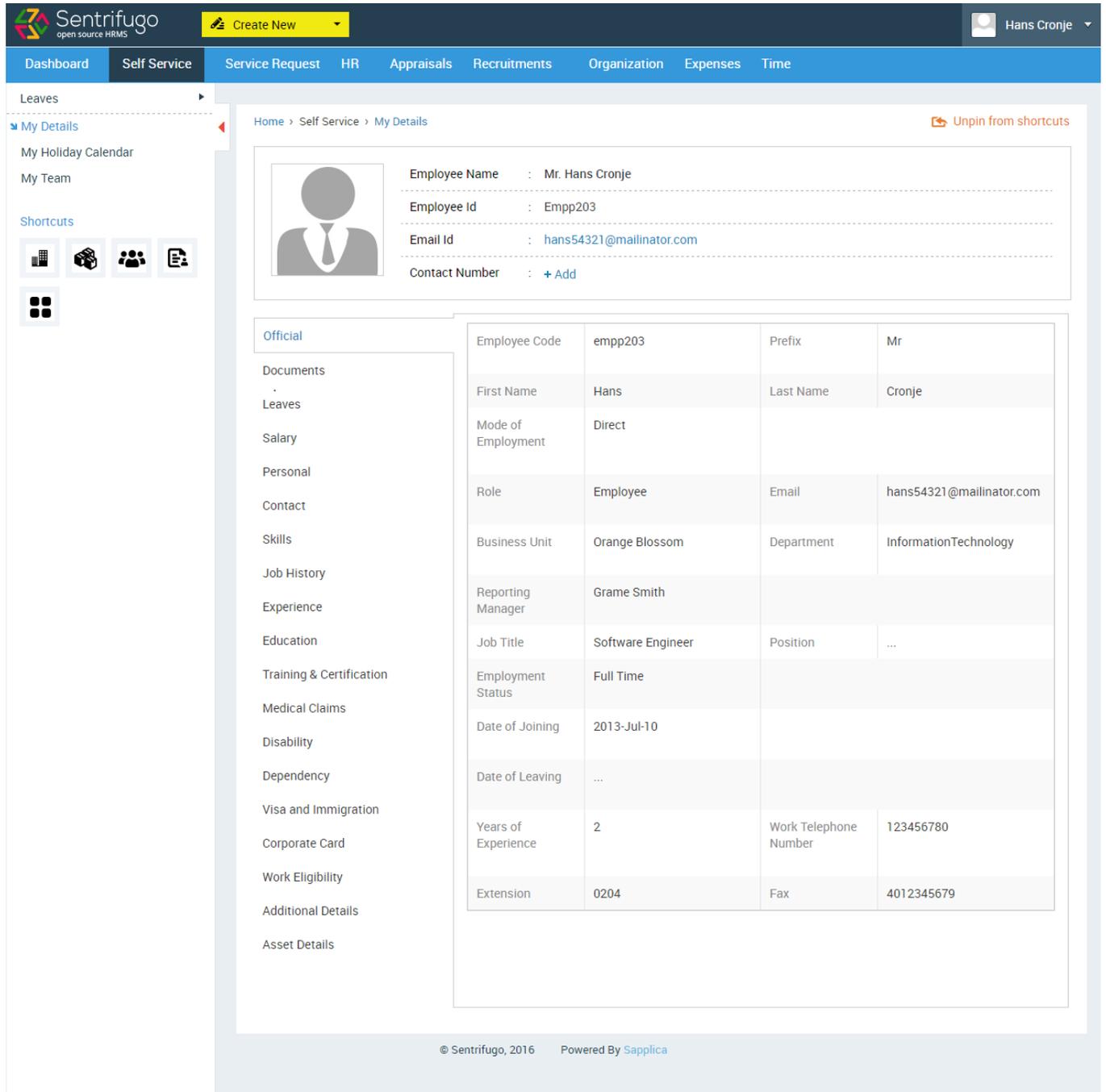
- a. Click **Self Service** in the top menu
- b. Click **My Details** on the left menu panel



Only the Super Admin/Management/HR has the privilege to add/edit 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

Contact Number : + Add

Employee Code	empp203	Prefix	Mr
First Name	Hans	Last Name	Cronje
Mode of Employment	Direct		
Role	Employee	Email	hans54321@mailinator.com
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

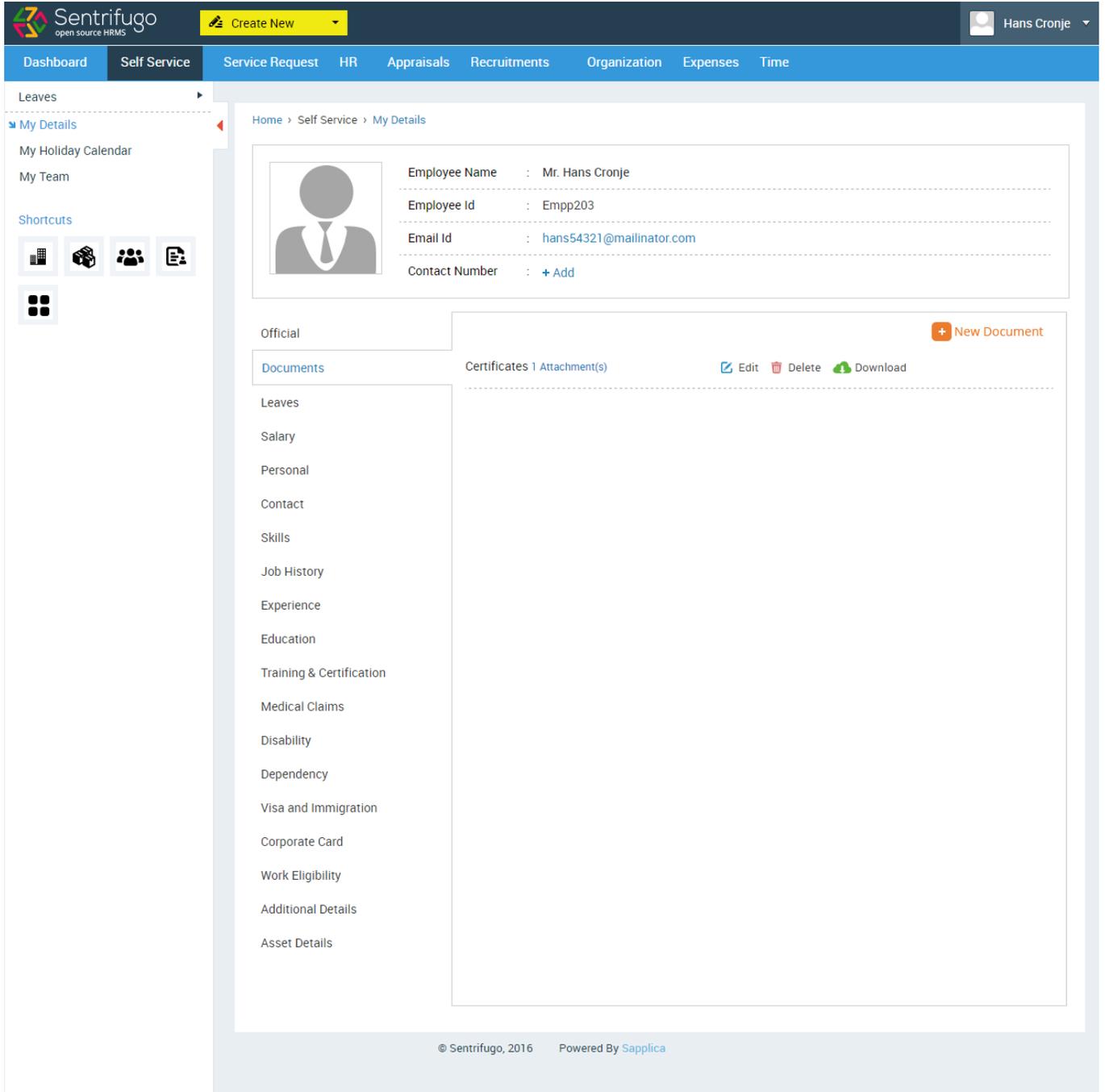
© Sentrifugo, 2016 Powered By [Saplica](#)

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. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. The user profile 'Hans Cronje' is visible in the top right. The left sidebar contains 'Leaves', 'My Details', 'My Holiday Calendar', 'My Team', and 'Shortcuts'. 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
- Contact Number : + Add

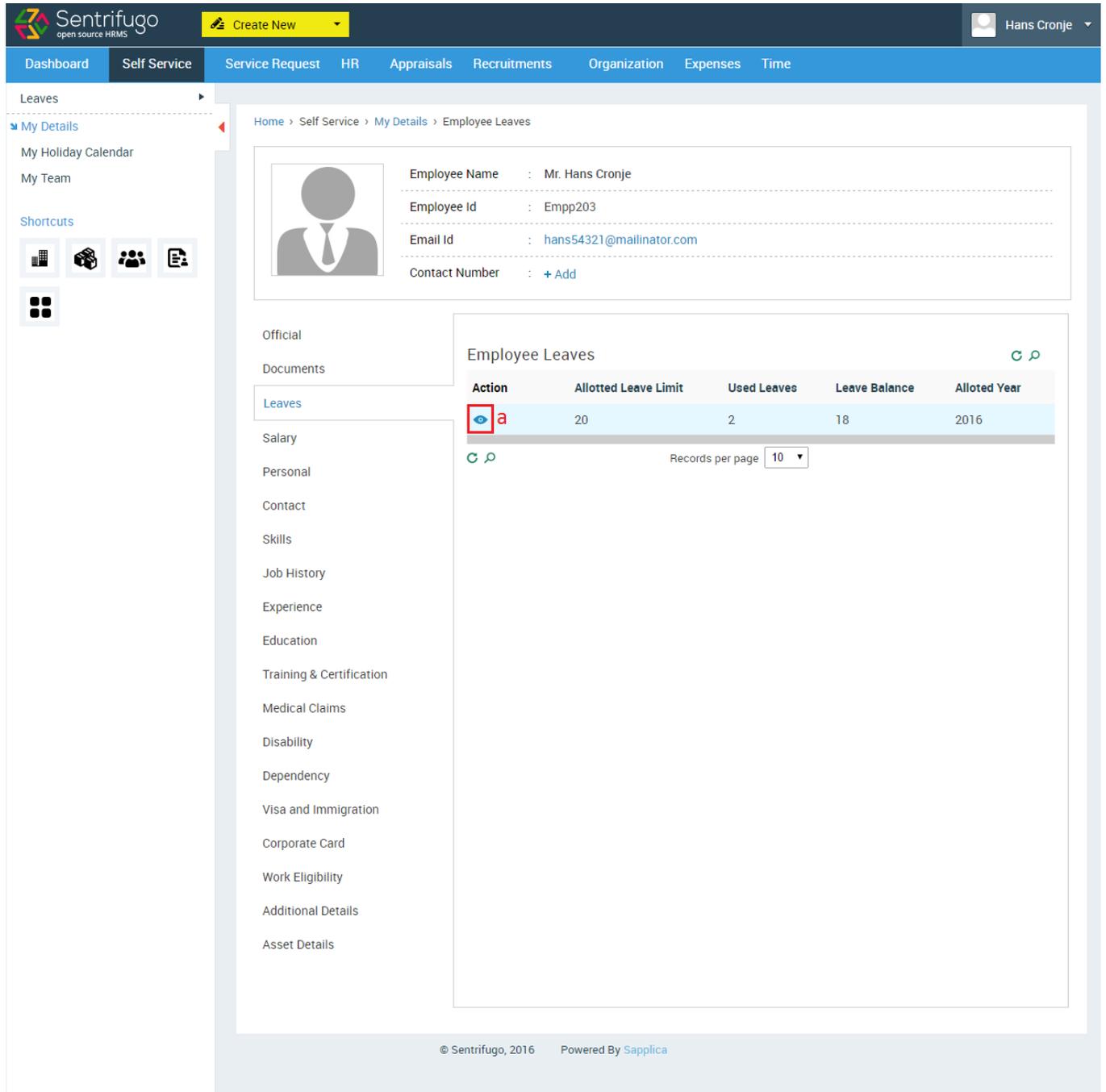
Below the profile card is a section for 'Official Documents'. It includes a 'New Document' button and a list of documents with 'Certificates 1 Attachment(s)'. Action icons for 'Edit', 'Delete', and 'Download' are visible. A vertical menu on the left lists various HRMS features: Leaves, Salary, Personal, Contact, Skills, Job History, Experience, Education, Training & Certification, Medical Claims, Disability, Dependency, Visa and Immigration, Corporate Card, Work Eligibility, Additional Details, and Asset Details. The footer contains the text '© 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

© Sentrifugo, 2016 Powered By Sapplica

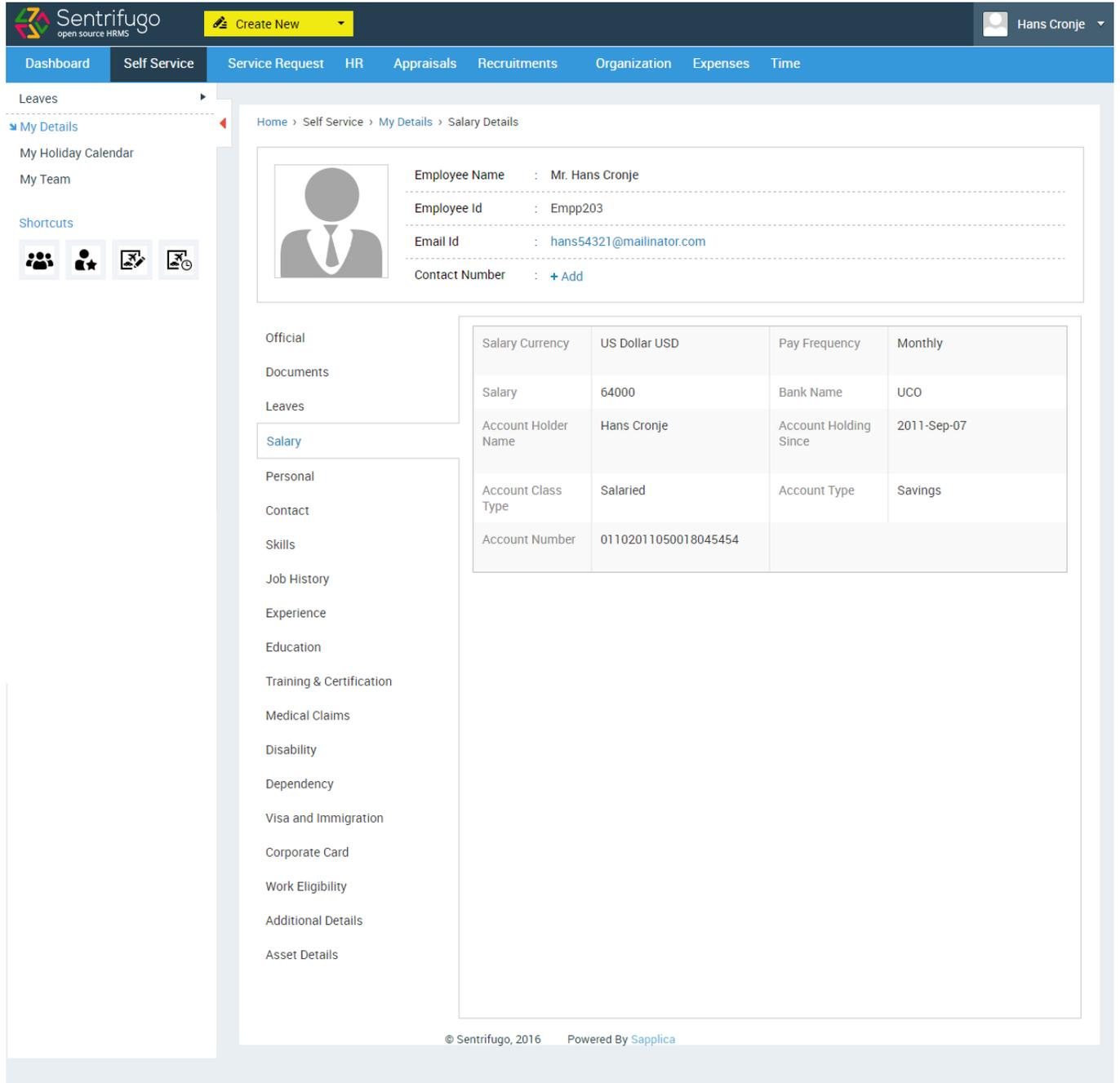
Figure 68

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

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		

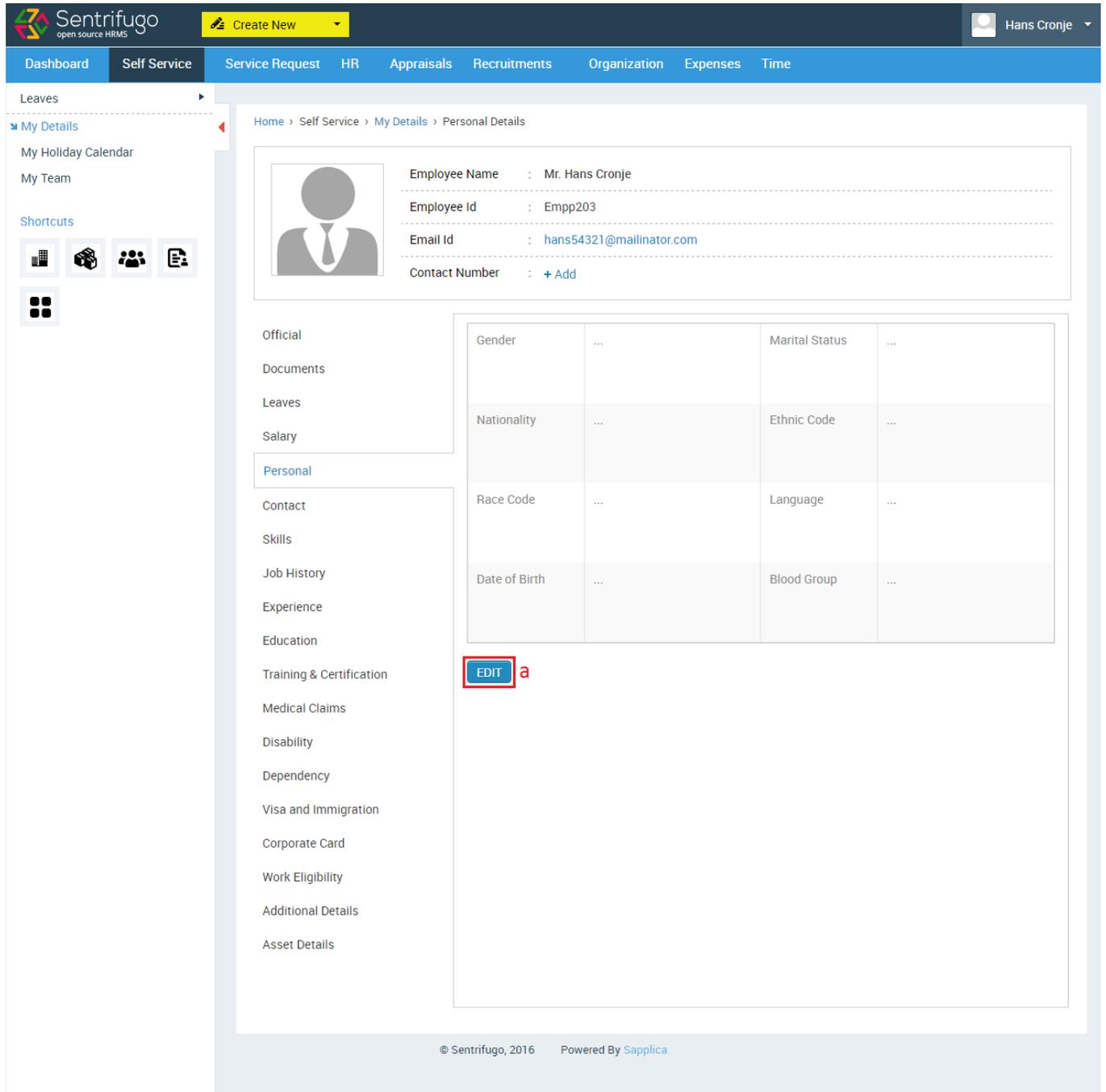
© Sentrifugo, 2016 Powered By Sapplica

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

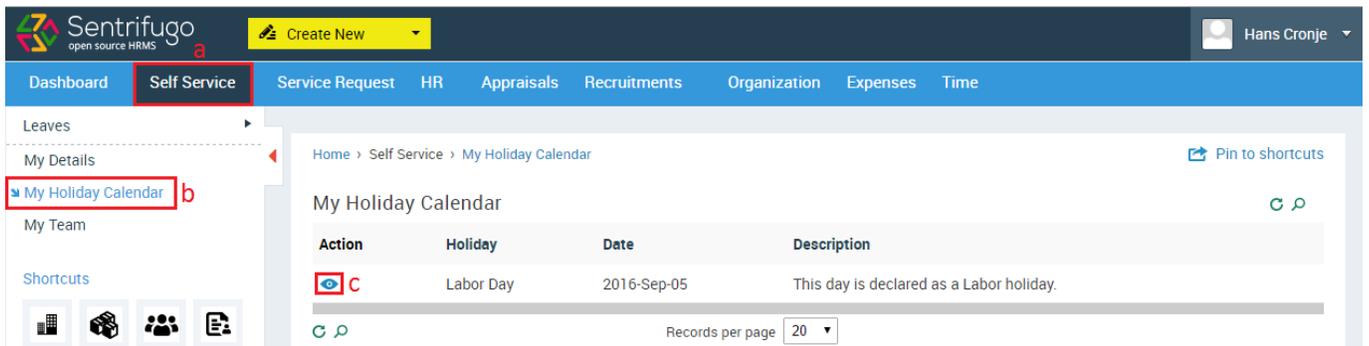


Figure 71

- 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

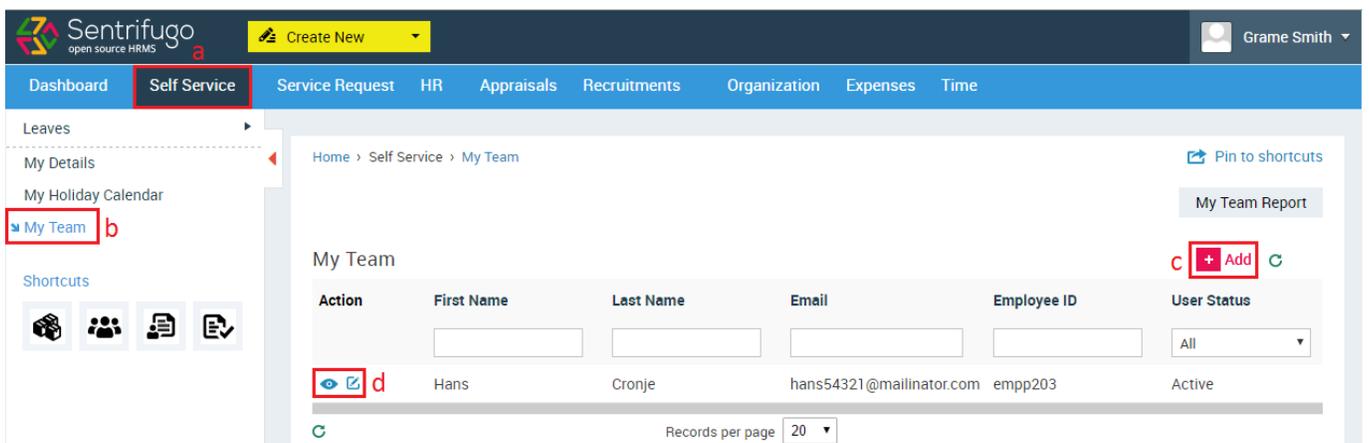


Figure 72

- 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

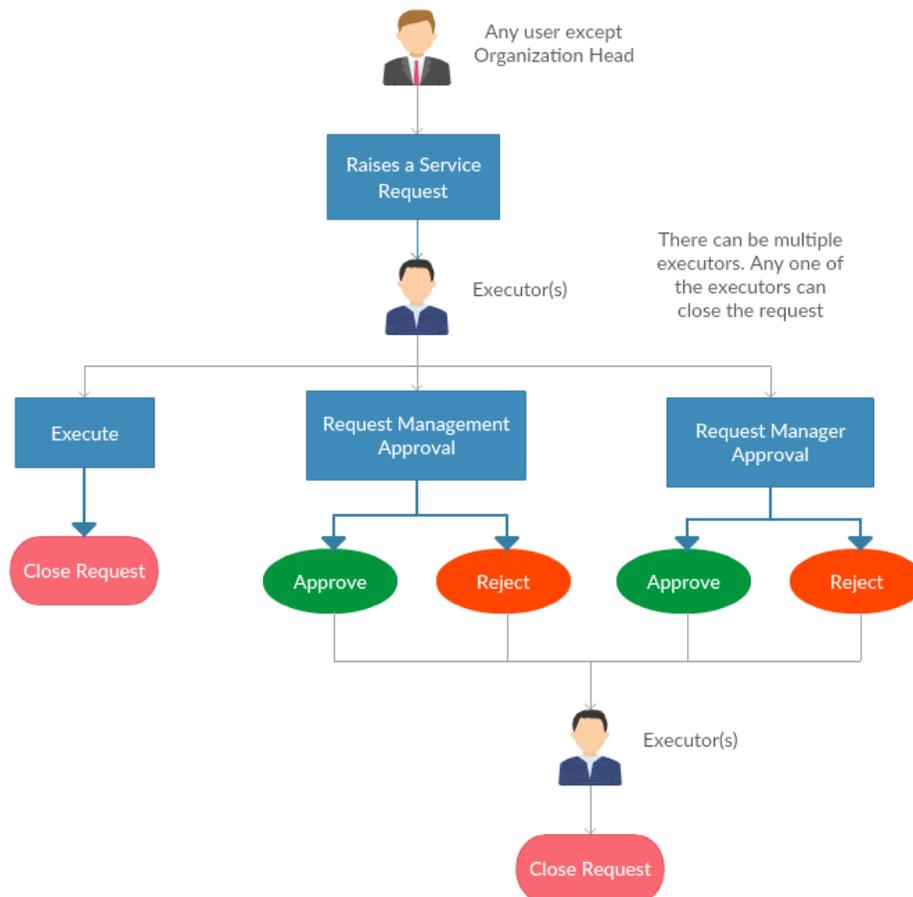
d. Click **View/Edit** icon to view or edit employee details



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

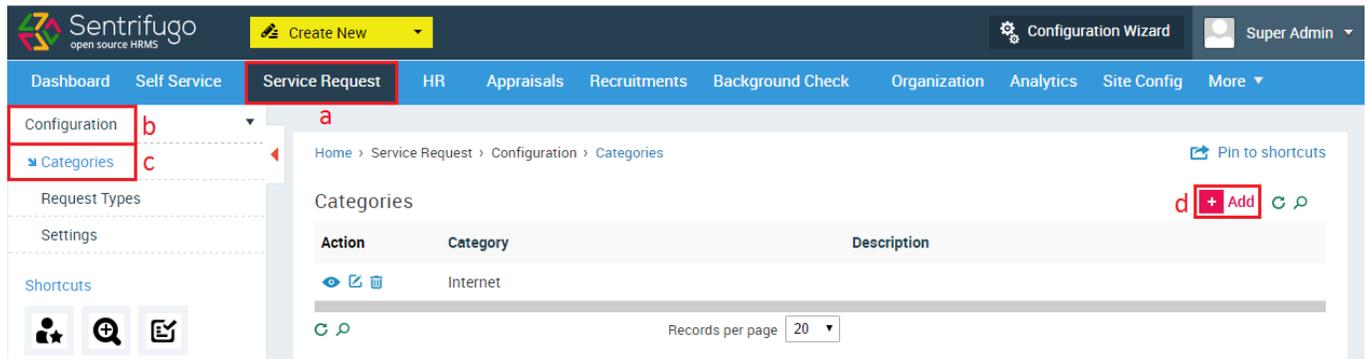


Figure 73

- 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

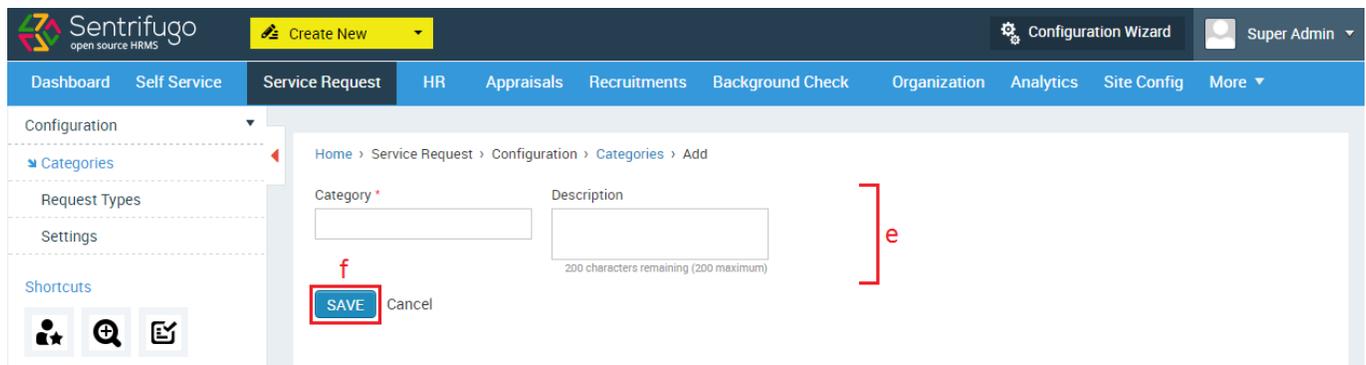


Figure 74

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

5.2 How do I create Service Request Types?

Please refer Figure 75

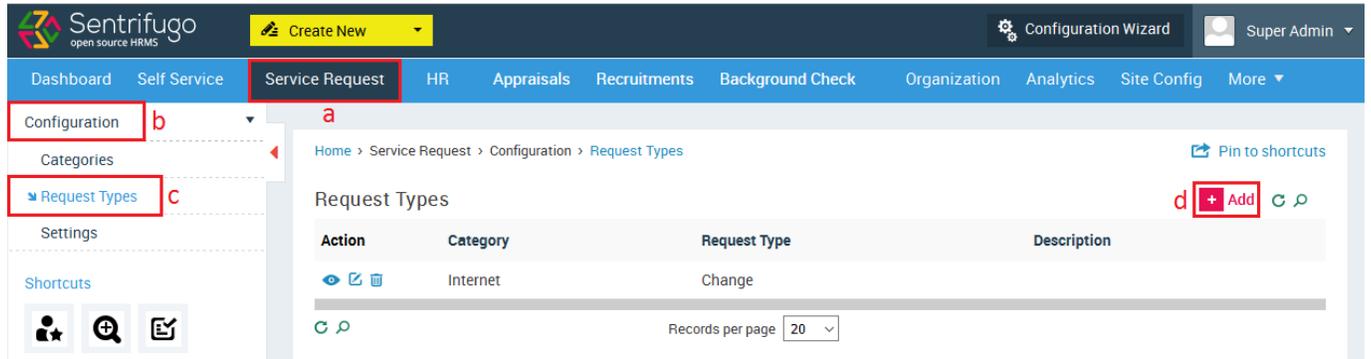


Figure 75

- 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

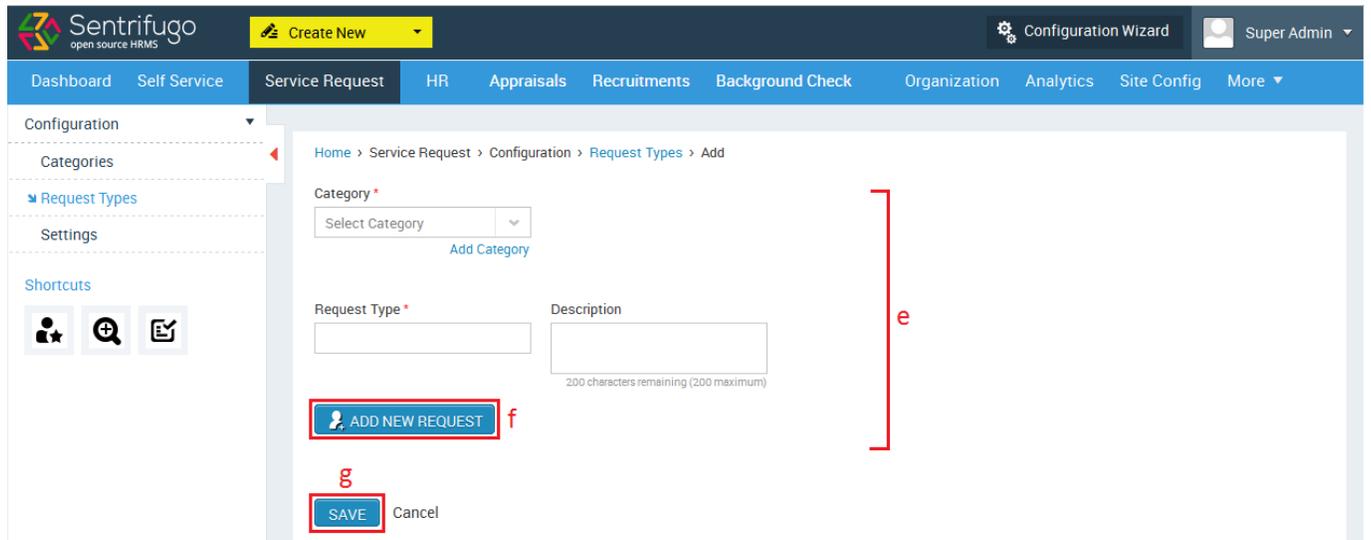


Figure 76

- 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

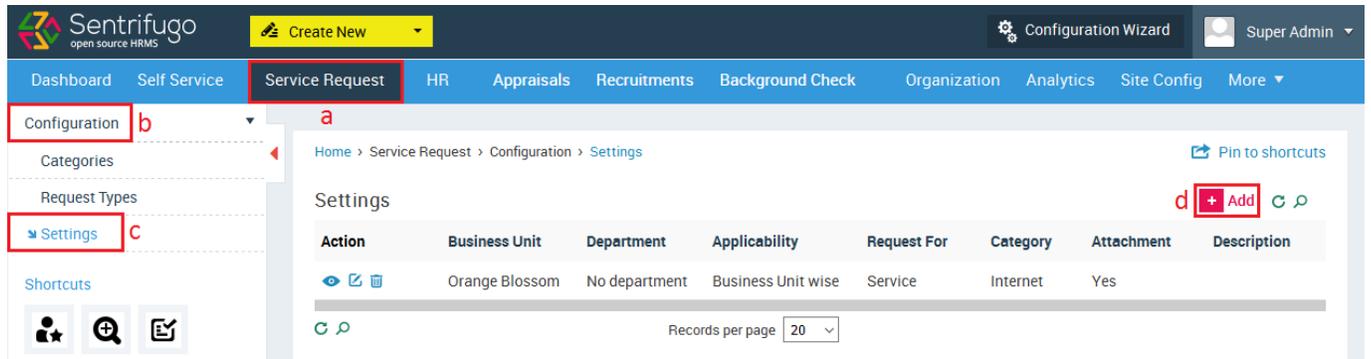


Figure 77

- 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

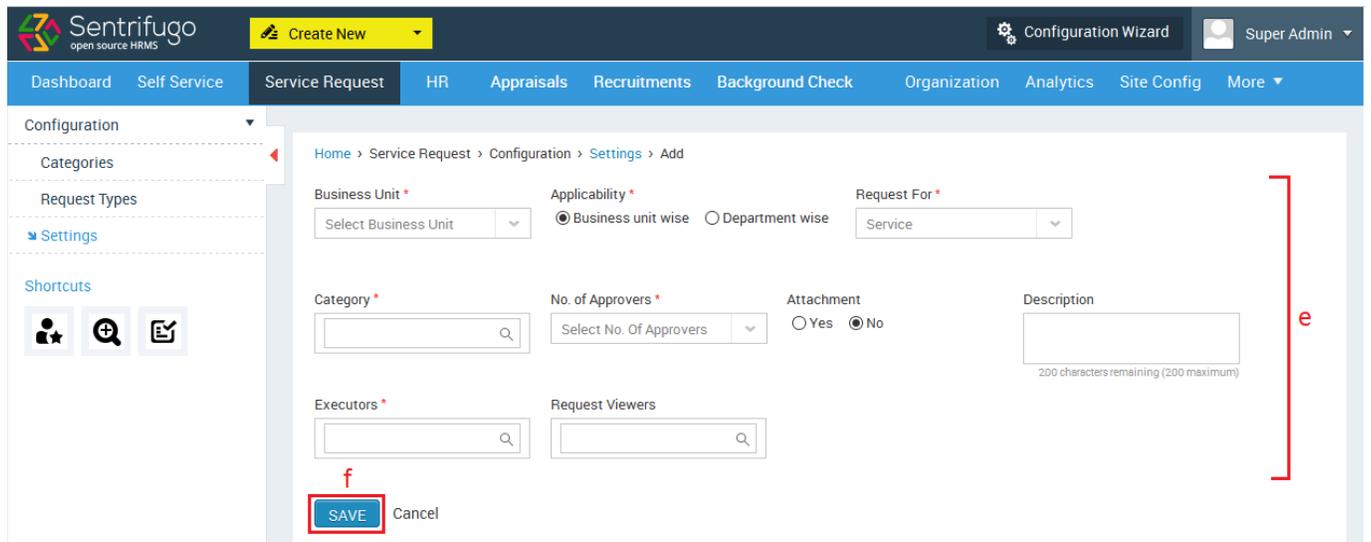


Figure 78

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

5.4 Who are Approvers, Executors and Viewers?

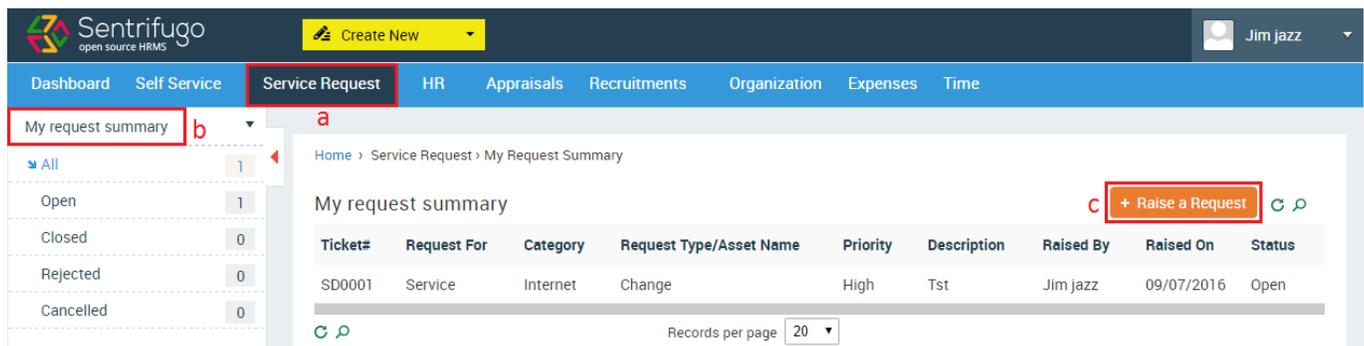
Approvers *Management*: They are responsible for providing approval for service requests. Executor(s) send a request for approval to the Approver(s). You can have a maximum of 3 approvers and a minimum of 1 approver.

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', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. The 'Service Request' menu item is highlighted. On the left side, there is a 'My request summary' dropdown menu with options: All (1), Open (1), Closed (0), Rejected (0), and Cancelled (0). The main content area shows a table with one record:

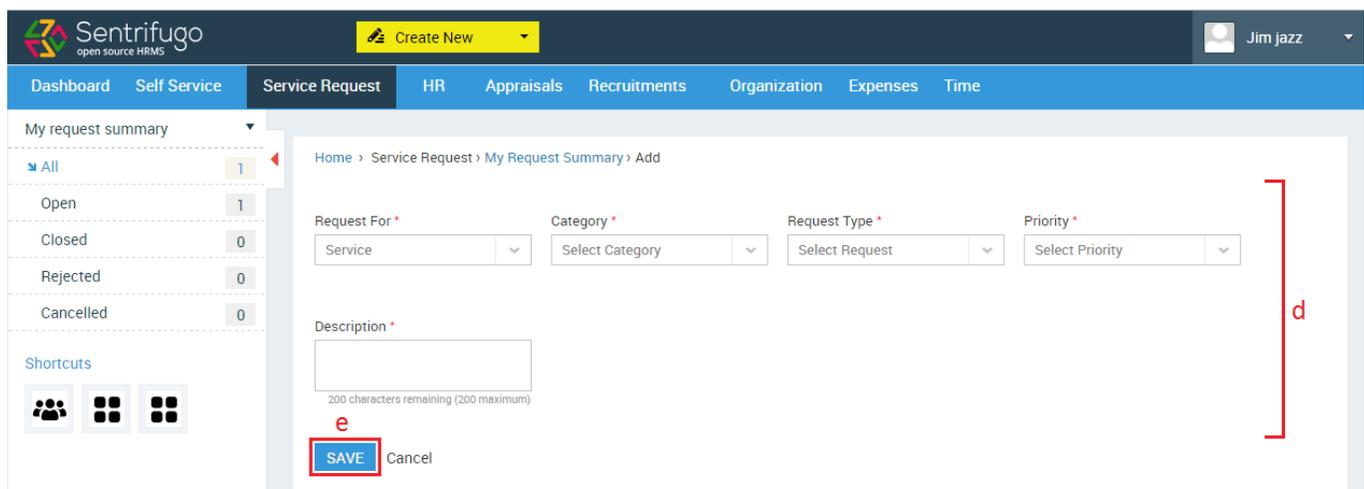
Ticket#	Request For	Category	Request Type/Asset Name	Priority	Description	Raised By	Raised On	Status
SD0001	Service	Internet	Change	High	Tst	Jim jazz	09/07/2016	Open

At the top right of the table, there is a '+ Raise a Request' button. The page also shows 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 form fields are:

- Request For ***: Service (dropdown)
- Category ***: Select Category (dropdown)
- Request Type ***: Select Request (dropdown)
- Priority ***: Select Priority (dropdown)
- Description ***: Text input field with a note '200 characters remaining (200 maximum)'

At the bottom of the form, there is a 'SAVE' button and a 'Cancel' link. The page also shows a 'Shortcuts' section with icons for users, a grid, and a list.

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

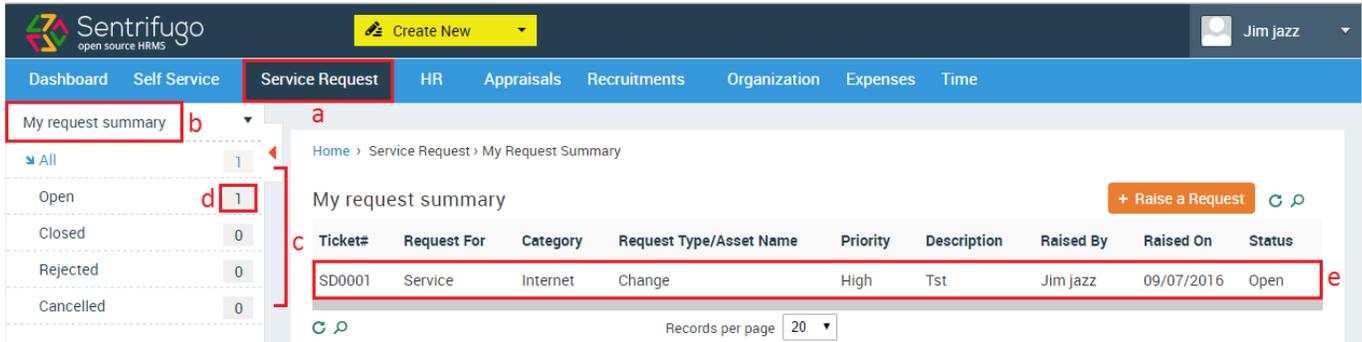


Figure 81

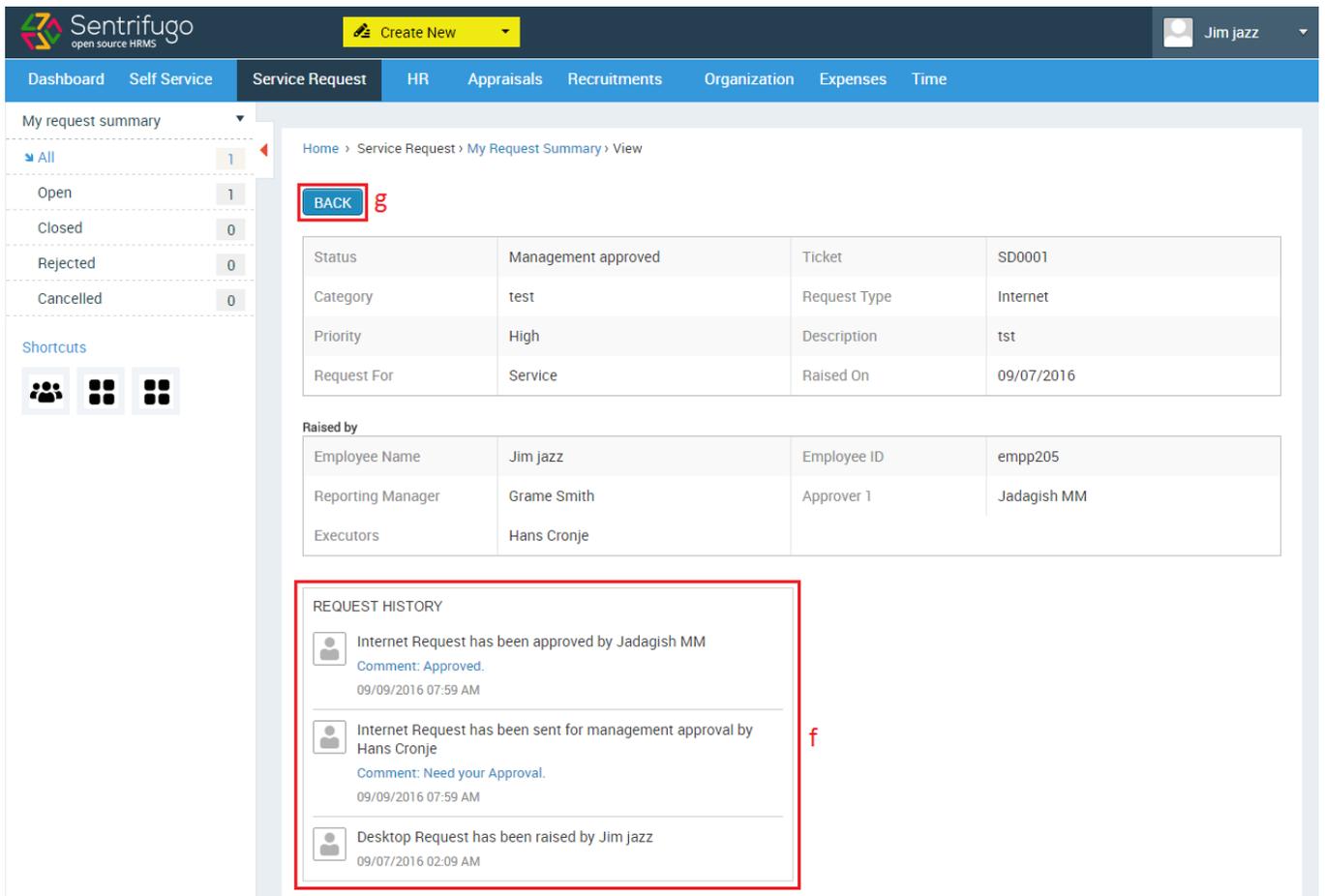
- a. Click **Service Request** in the top menu
- b. Click **My request summary** on the left menu panel

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 interface for a Service Request. 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 left sidebar shows 'My request summary' with filters for 'All' (1), 'Open' (1), 'Closed' (0), 'Rejected' (0), and 'Cancelled' (0). A 'Shortcuts' section is also visible. The main content area shows the 'My Request Summary' for a request with the following details:

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, the 'Raised by' section shows:

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 contains the following 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

A 'BACK' button is highlighted with a red box and labeled 'g'. A red box around the request history is labeled 'f'.

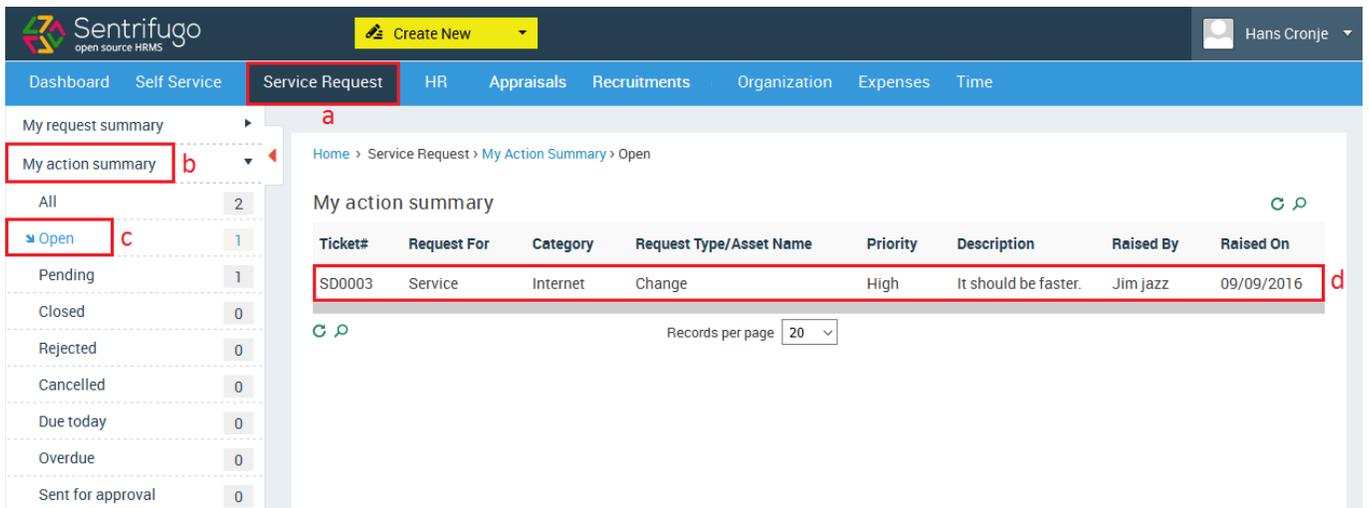
Figure 82

- 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



My request summary

- My action summary **b**
 - All 2
 - Open** **c** 1
 - Pending 1
 - Closed 0
 - Rejected 0
 - Cancelled 0
 - Due today 0
 - Overdue 0
 - Sent for approval 0

Home > Service Request > My Action Summary > Open

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

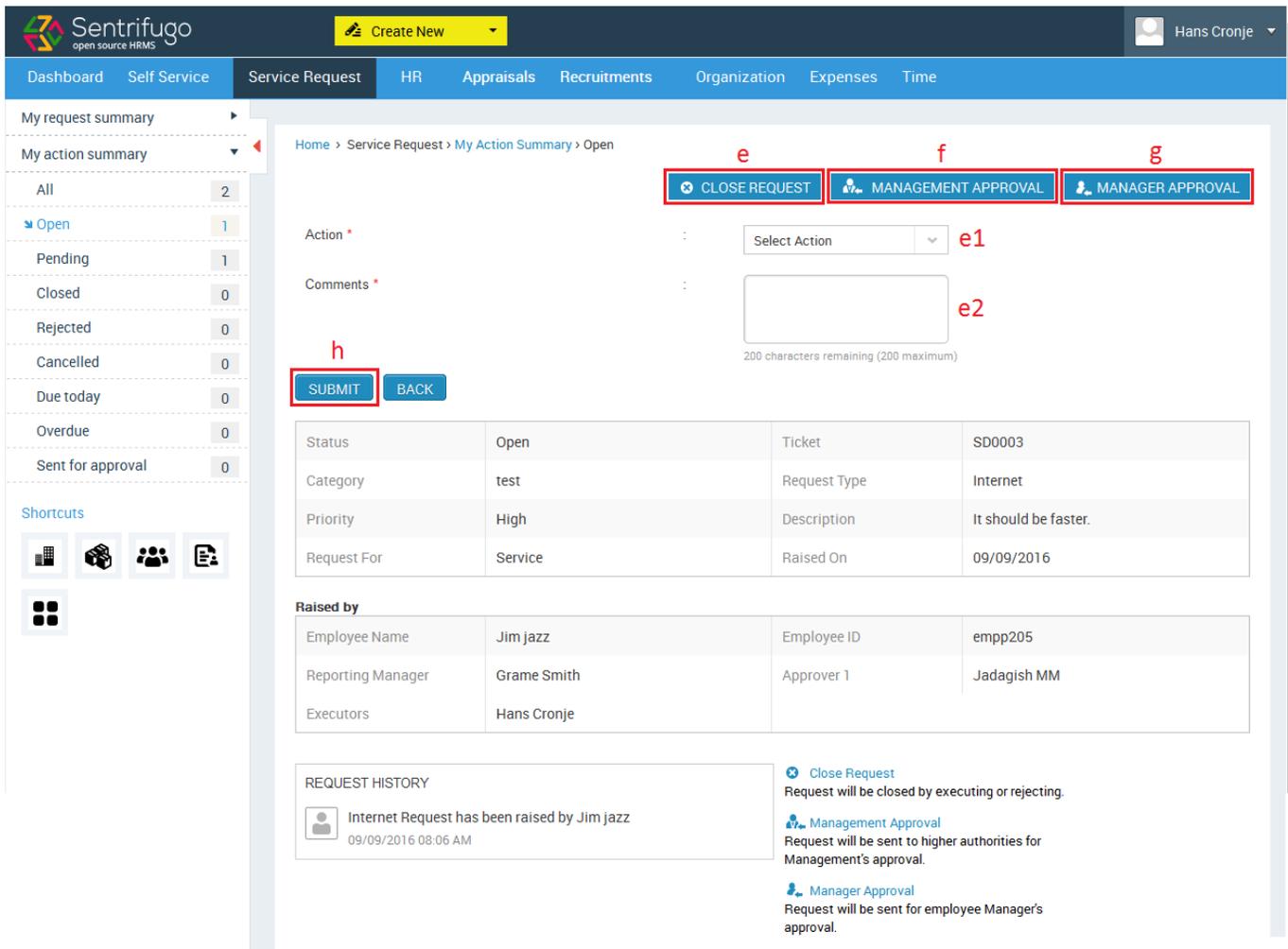
Figure 83

- 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 main content area is titled 'Home > Service Request > My Action Summary > Open'. It features three buttons: 'CLOSE REQUEST' (labeled 'e'), 'MANAGEMENT APPROVAL' (labeled 'f'), and 'MANAGER APPROVAL' (labeled 'g'). Below these is an 'Action' dropdown menu (labeled 'e1') and a 'Comments' text area (labeled 'e2'). A 'SUBMIT' button (labeled 'h') and a 'BACK' button are also present. A table displays request details: Status (Open), Ticket (SD0003), Category (test), Request Type (Internet), Priority (High), Description (It should be faster), and Request For (Service). Another table shows 'Raised by' information: Employee Name (Jim jazz), Reporting Manager (Grame Smith), and Executors (Hans Cronje). A 'REQUEST HISTORY' section shows a log entry: 'Internet Request has been raised by Jim jazz' on 09/09/2016 at 08:06 AM. To the right, there are three informational links: 'Close Request' (Request will be closed by executing or rejecting), 'Management Approval' (Request will be sent to higher authorities for Management's approval), and '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

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

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		

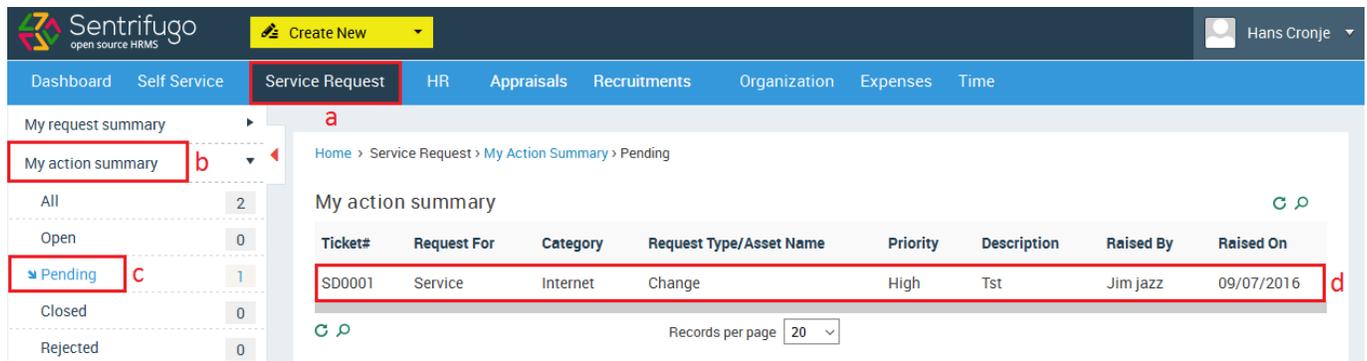
Figure 86

- 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



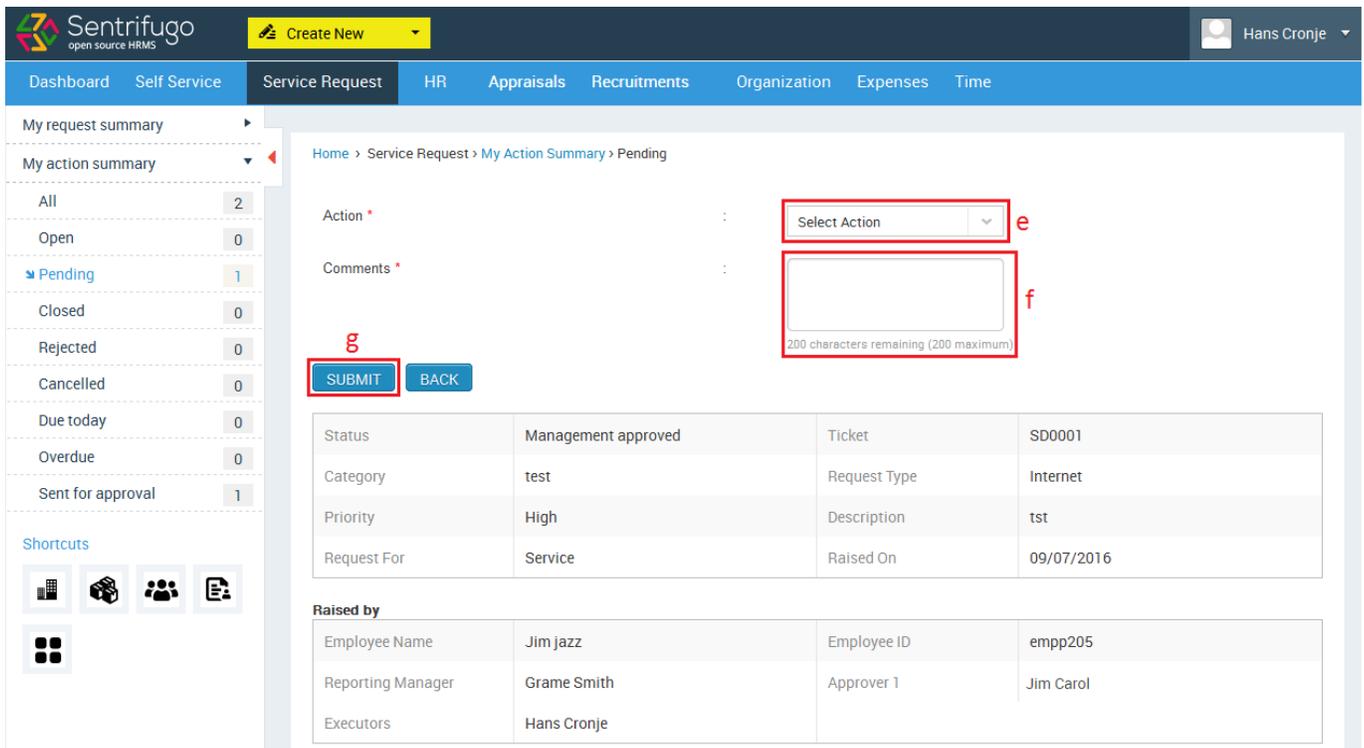
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request' (highlighted with a red box 'a'), 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. The user profile 'Hans Cronje' is visible in the top right. On the left sidebar, 'My request summary' is expanded, and 'My action summary' (highlighted with a red box 'b') is selected. Under 'My action summary', 'Pending' (highlighted with a red box 'c') is selected. The main content area shows a table of pending tickets. The first row is highlighted with a red box 'd'.

Ticket#	Request For	Category	Request Type/Asset Name	Priority	Description	Raised By	Raised On
SD0001	Service	Internet	Change	High	Tst	Jim jazz	09/07/2016

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.

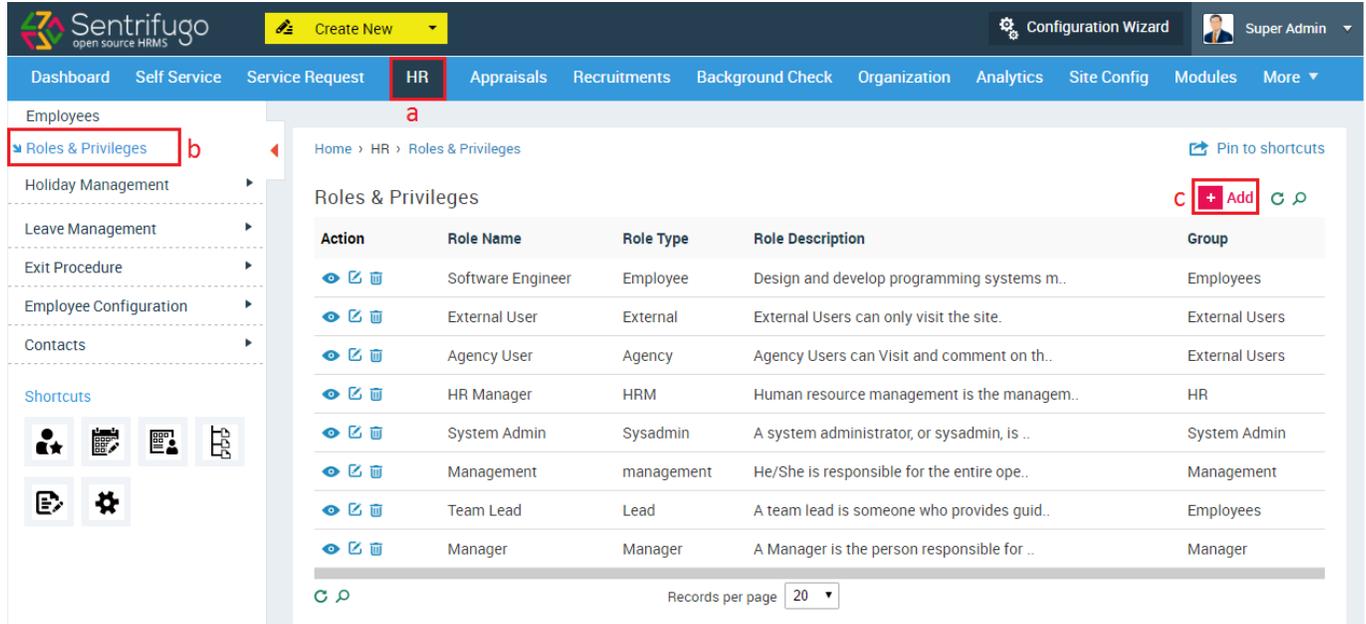
As mentioned earlier in section [1.1 What are the roles available in Sentrifugo?](#), there are 6 main role groups available by default in Sentrifugo:

- 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



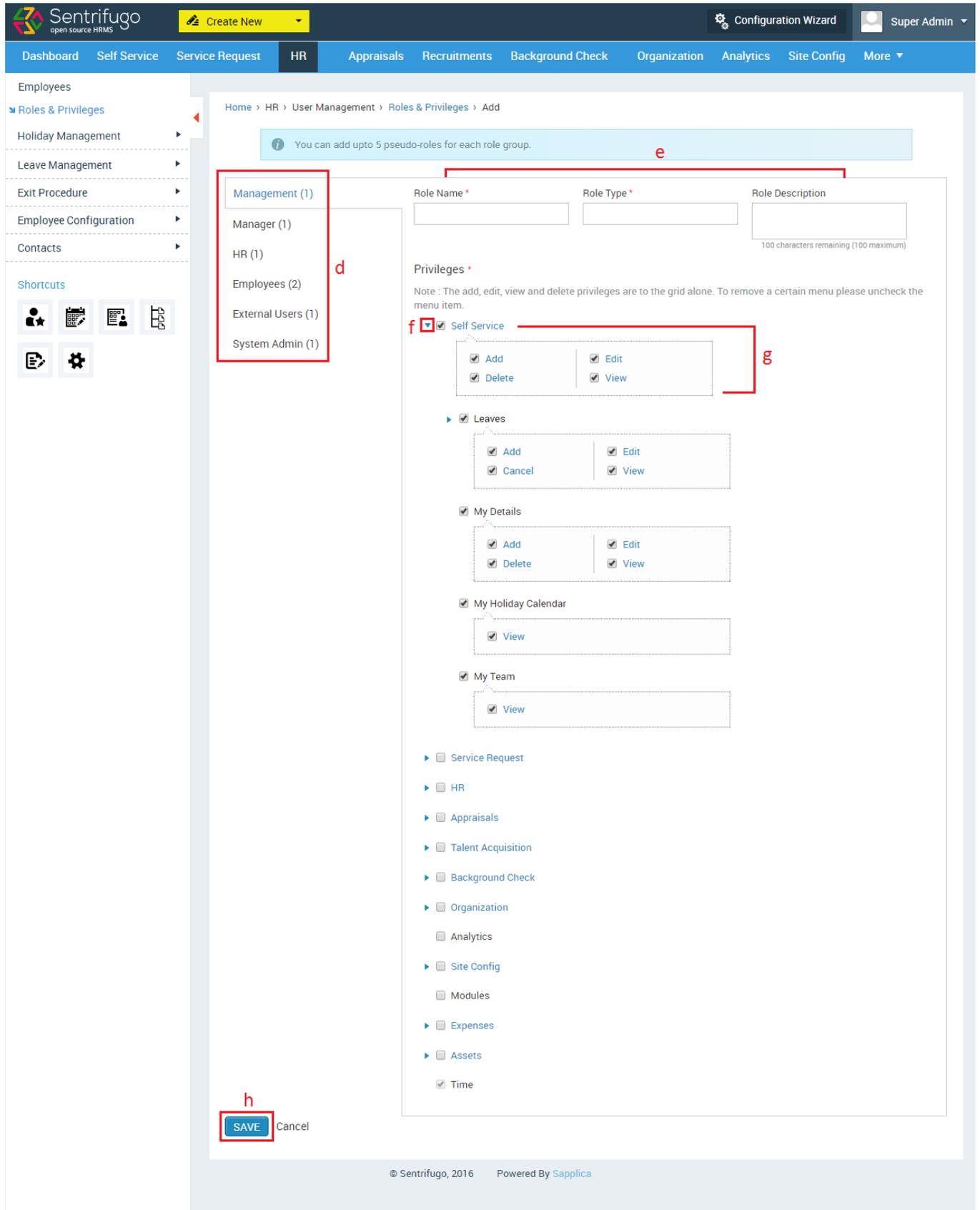
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', 'Modules', and 'More'. The 'HR' menu item is highlighted with a red box and labeled 'a'. The left sidebar menu includes 'Employees', 'Roles & Privileges', 'Holiday Management', 'Leave Management', 'Exit Procedure', 'Employee Configuration', and 'Contacts'. The 'Roles & Privileges' menu item is highlighted with a red box and labeled 'b'. The main content area displays the 'Roles & Privileges' page with a table of roles. The '+Add' button is highlighted with a red box and labeled 'c'. The table has columns for Action, Role Name, Role Type, Role Description, and Group. The 'Records per page' dropdown is set to 20.

Action	Role Name	Role Type	Role Description	Group
  	Software Engineer	Employee	Design and develop programming systems m..	Employees
  	External User	External	External Users can only visit the site.	External Users
  	Agency User	Agency	Agency Users can Visit and comment on th..	External Users
  	HR Manager	HRM	Human resource management is the managem..	HR
  	System Admin	Sysadmin	A system administrator, or sysadmin, is ..	System Admin
  	Management	management	He/She is responsible for the entire ope..	Management
  	Team Lead	Lead	A team lead is someone who provides guid..	Employees
  	Manager	Manager	A Manager is the person responsible for ..	Manager

Figure 89

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

Please refer Figure 90



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

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

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.

Self Service

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

SAVE Cancel

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Figure 90

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

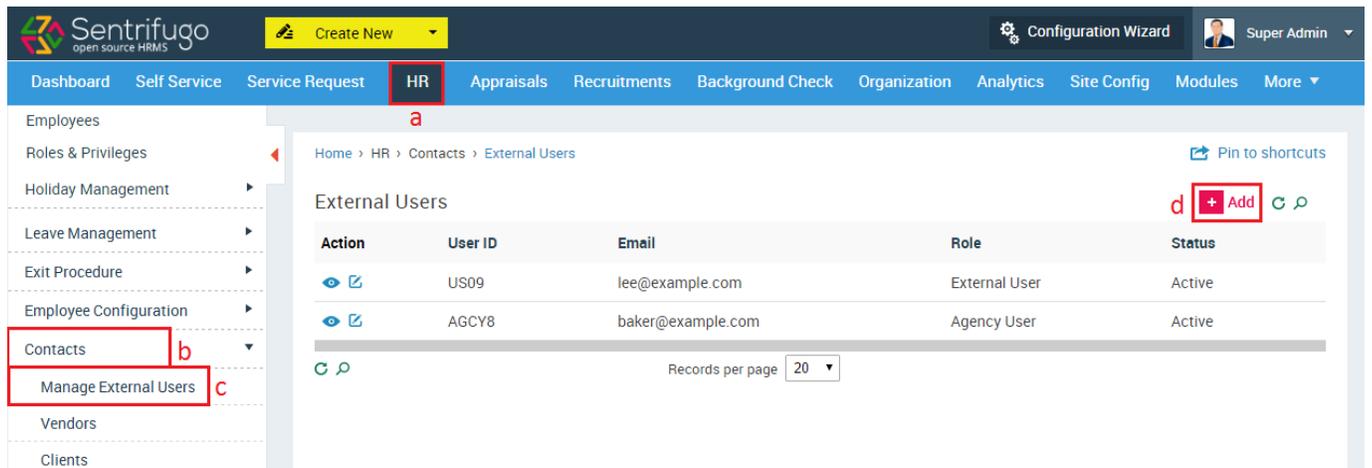
6.3 How do I add External Users?

External Users have limited access to information on Sentrifugo. There are 2 types of External Users in this application:

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

For other external roles such as Vendors and Clients, please refer [Contacts](#).

Please refer *Figure 91*



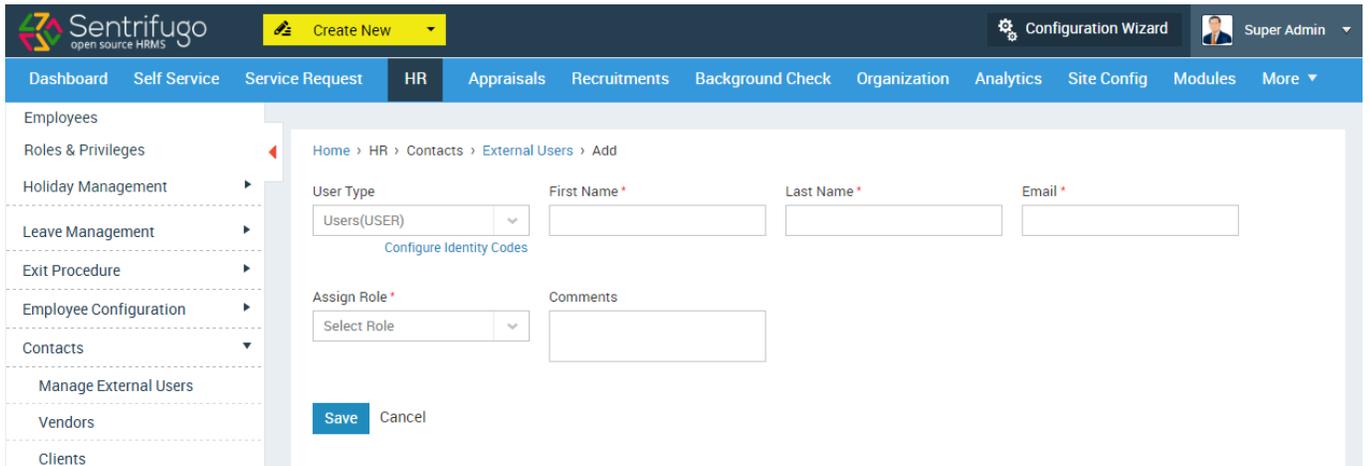
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR' (highlighted with 'a'), 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', 'Modules', and 'More'. The left sidebar contains 'Employees', 'Roles & Privileges', 'Holiday Management', 'Leave Management', 'Exit Procedure', 'Employee Configuration', 'Contacts' (highlighted with 'b'), 'Manage External Users' (highlighted with 'c'), 'Vendors', and 'Clients'. The main content area shows the 'External Users' page with a breadcrumb 'Home > HR > Contacts > External Users'. A table lists two users: 'US09' (External User) and 'AGCY8' (Agency User). An '+ Add' button (highlighted with 'd') is visible in the top right of the table area. The page also includes a 'Records per page' dropdown set to 20.

Action	User ID	Email	Role	Status
 	US09	lee@example.com	External User	Active
 	AGCY8	baker@example.com	Agency User	Active

Figure 91

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

Please refer Figure 92



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', 'Modules', and 'More'. The left sidebar lists various HR functions like 'Employees', 'Roles & Privileges', 'Holiday Management', etc. The main content area is titled 'Home > HR > Contacts > External Users > Add'. It contains a form with the following fields: 'User Type' (dropdown menu with 'Users(USER)' selected), 'First Name *', 'Last Name *', 'Email *', 'Assign Role *' (dropdown menu with 'Select Role' selected), and 'Comments'. There are 'Save' and 'Cancel' buttons at the bottom of the form.

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

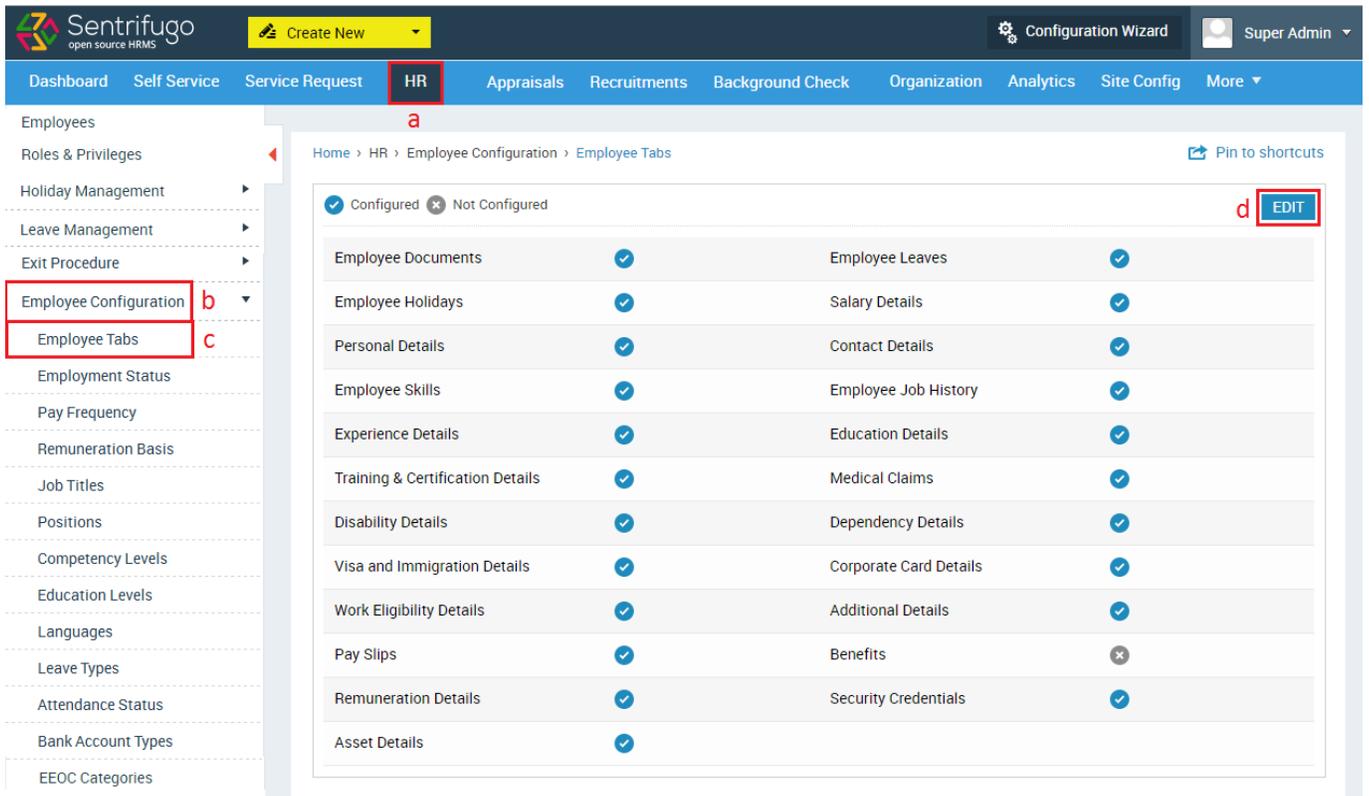
Please refer section [3. Leave Management](#)

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' (highlighted with 'a'), 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar menu includes 'Employees', 'Roles & Privileges', 'Holiday Management', 'Leave Management', 'Exit Procedure', 'Employee Configuration' (highlighted with 'b'), 'Employee Tabs' (highlighted with 'c'), 'Employment Status', 'Pay Frequency', 'Remuneration Basis', 'Job Titles', 'Positions', 'Competency Levels', 'Education Levels', 'Languages', 'Leave Types', 'Attendance Status', 'Bank Account Types', and 'EEOC Categories'. The main content area shows the 'Employee Configuration' page with a breadcrumb trail 'Home > HR > Employee Configuration > Employee Tabs'. A table lists various configuration items with checkboxes indicating their status. The 'EDIT' button in the top right corner of the table is highlighted with 'd'.

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

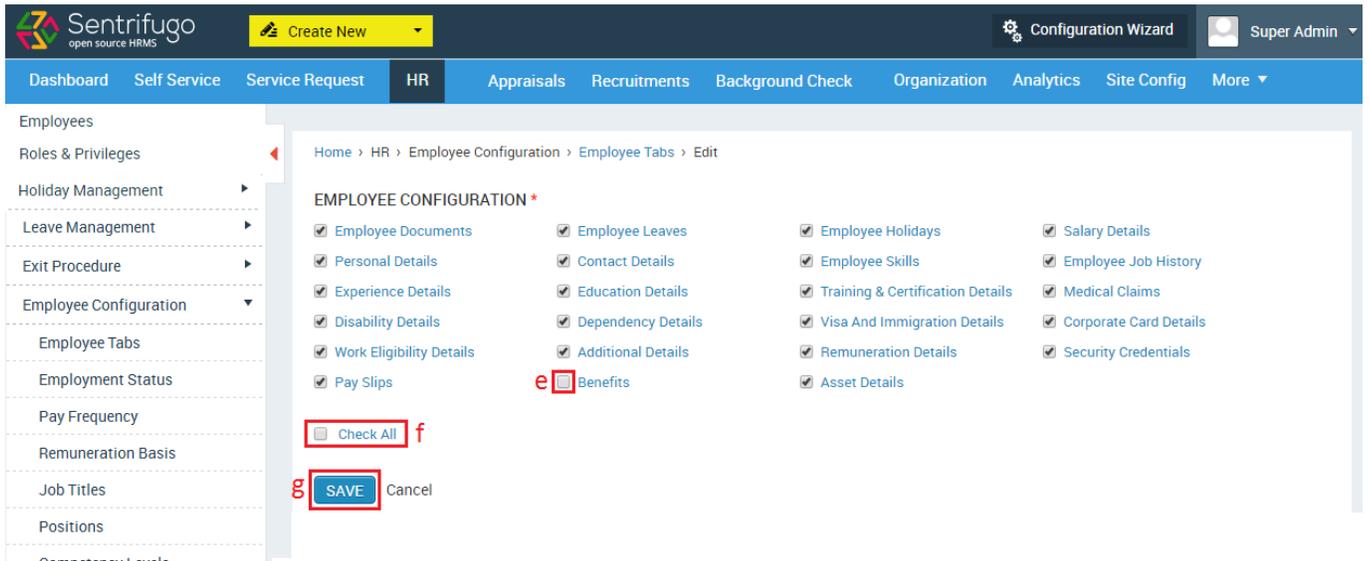


Figure 94

- 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

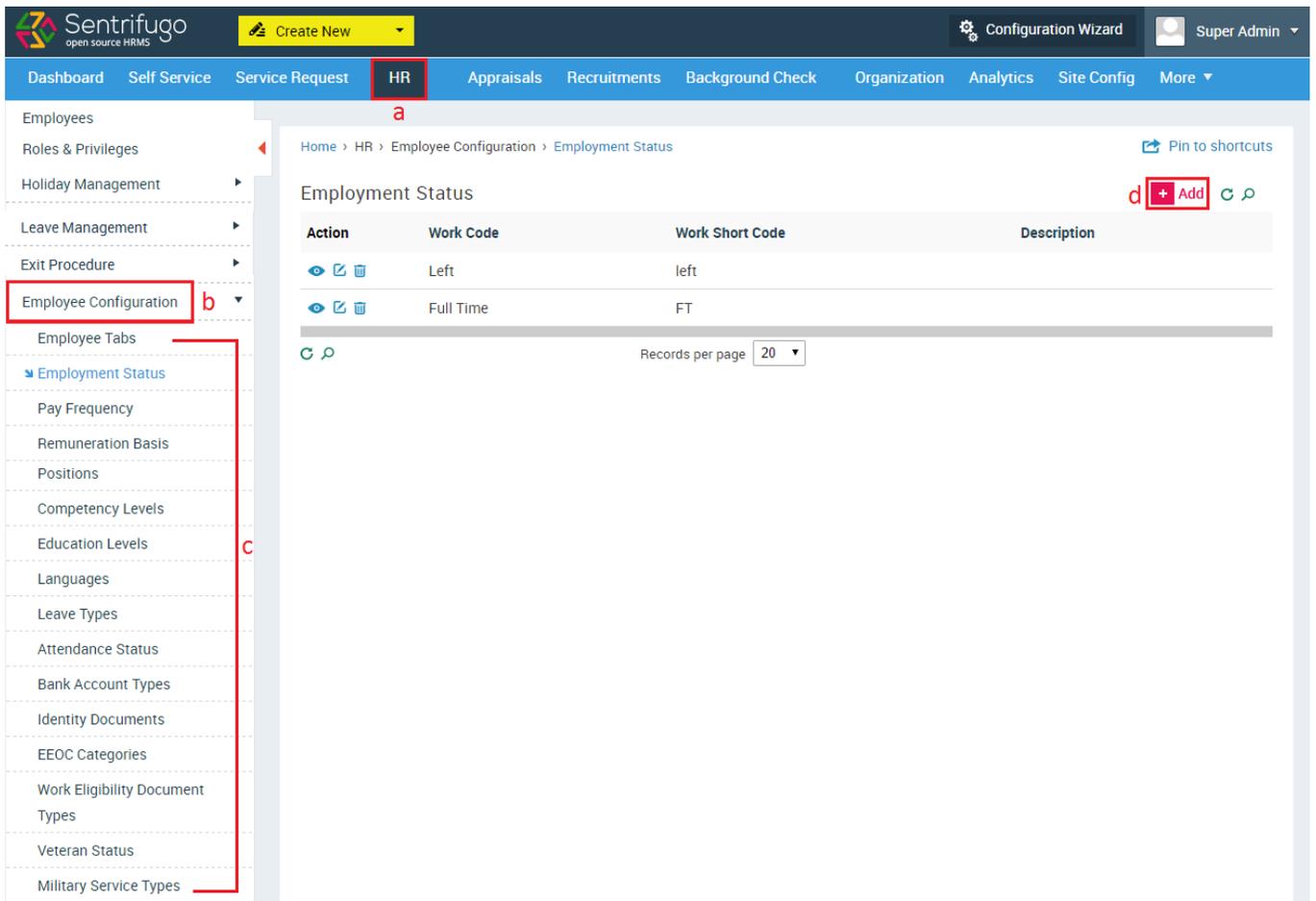


Figure 95

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

Please refer Figure 96

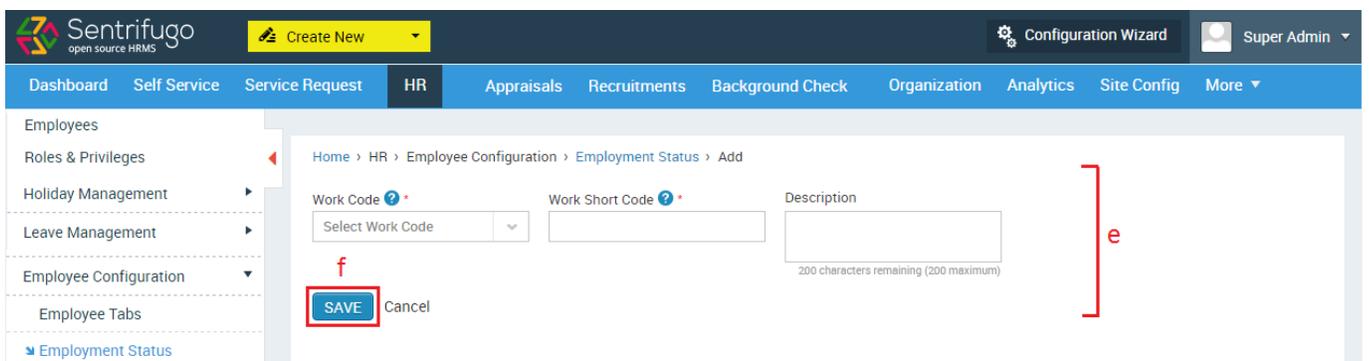


Figure 96

- 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 has 'HR' selected (a). The left sidebar has 'Employee Configuration' selected (b), and its submenu 'Identity Documents' is also selected (c). The main content area shows the 'Identity Documents' table with one entry 'Passport' and an '+ Add' button highlighted (d).

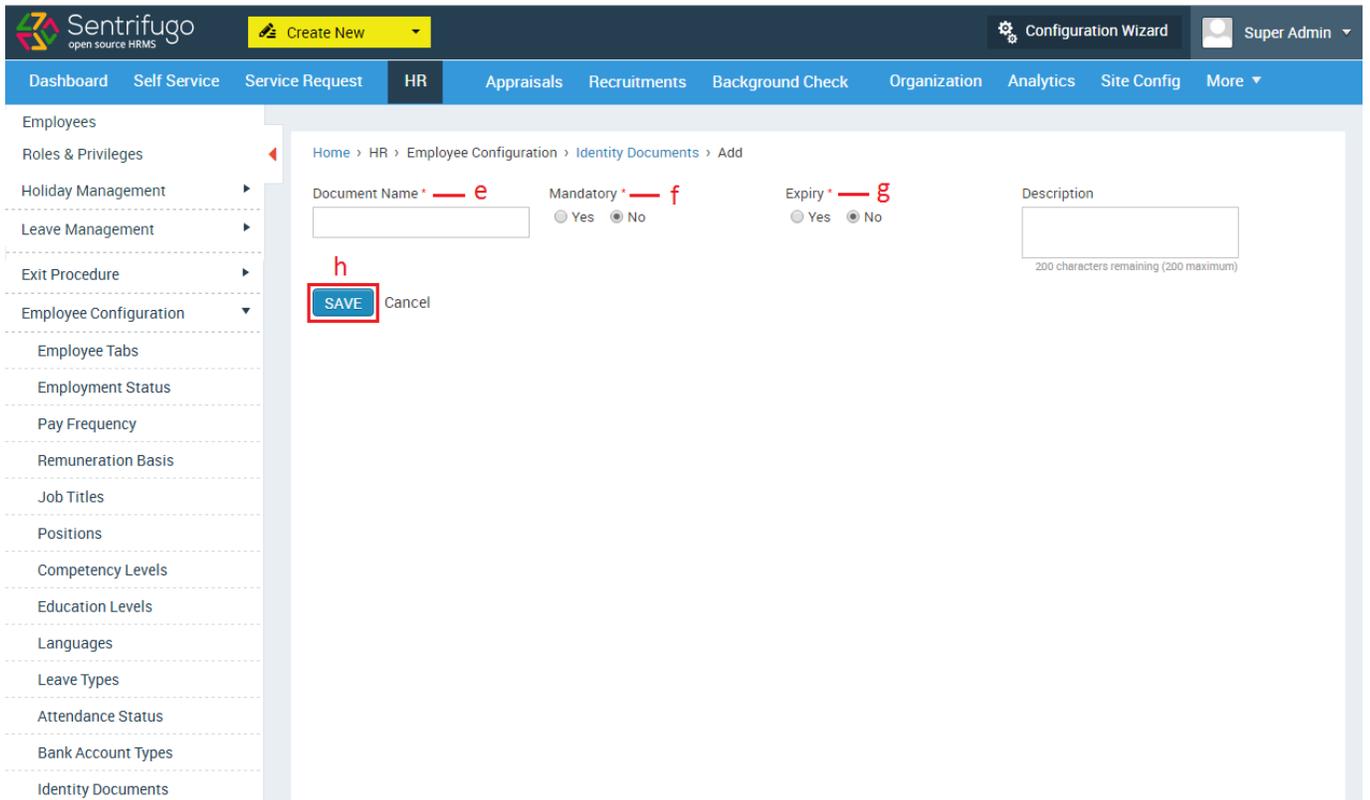
Action	Document Name	Mandatory	Expiry	Description
  	Passport	Yes	Yes	

Records per page: 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 HRMS modules, with 'Employee Configuration' expanded. The main content area shows the 'Add' form for 'Identity Documents'. The form includes the following fields and options:

- Document Name * **e** (text input field)
- Mandatory * **f** (radio buttons for Yes and No)
- Expiry * **g** (radio buttons for Yes and No)
- Description (text input field with a note: 200 characters remaining (200 maximum))

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

Figure 98

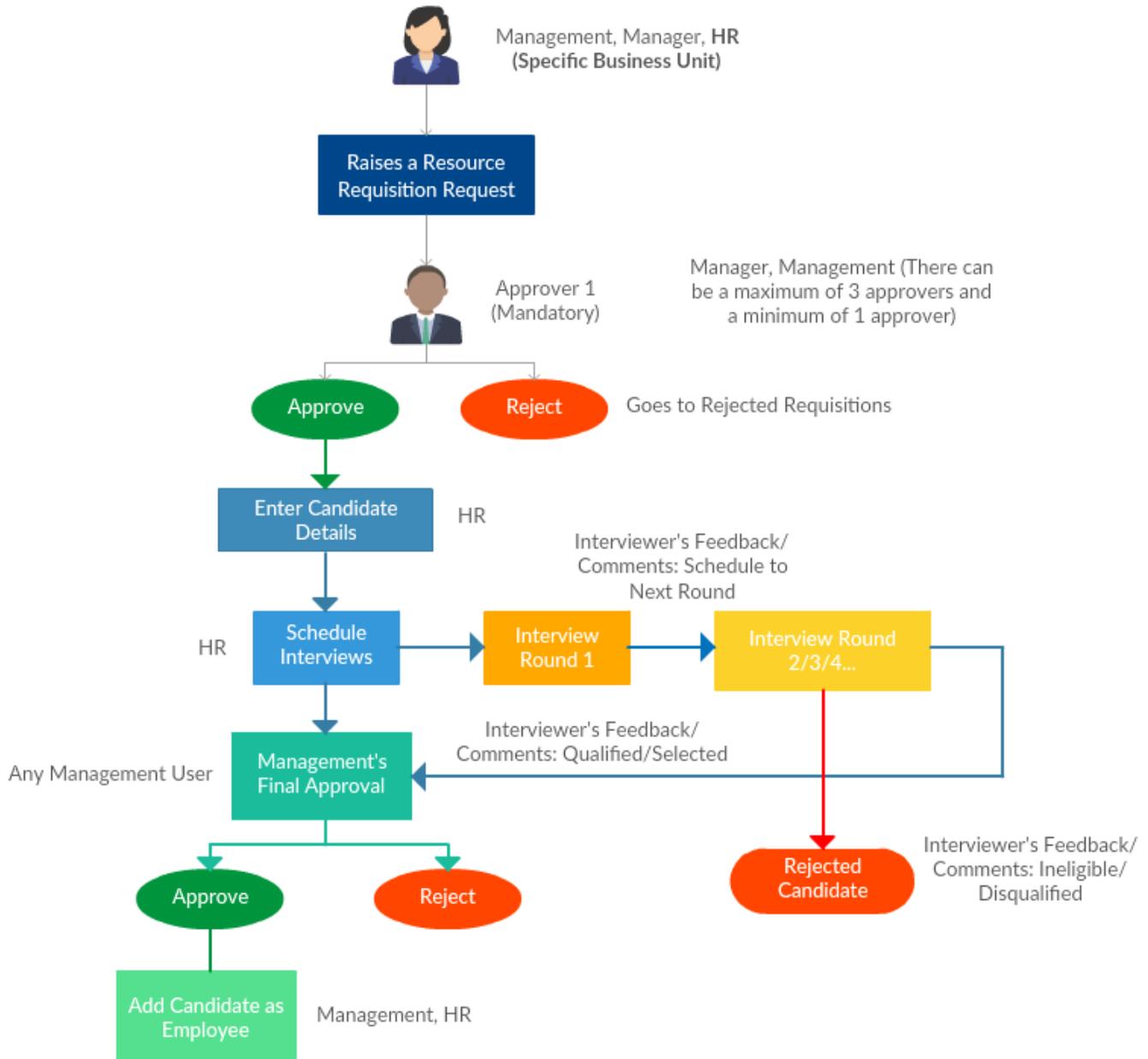
- e. Enter document name
- f. Select if you require a document to be mandatory or not
- g. Select if documents needs to have an expiry date
- h. Click **SAVE** button



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.

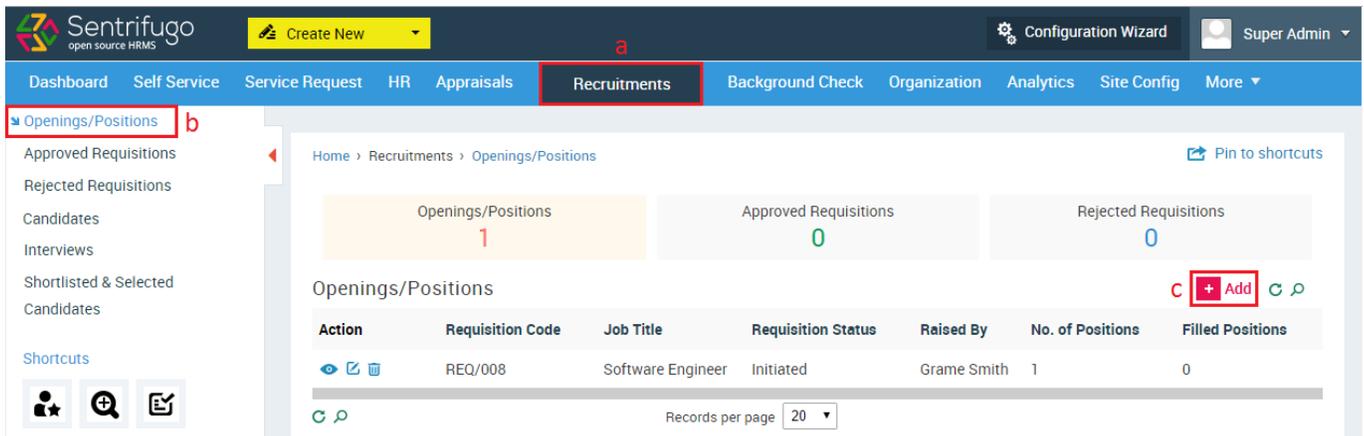


Description:

- 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



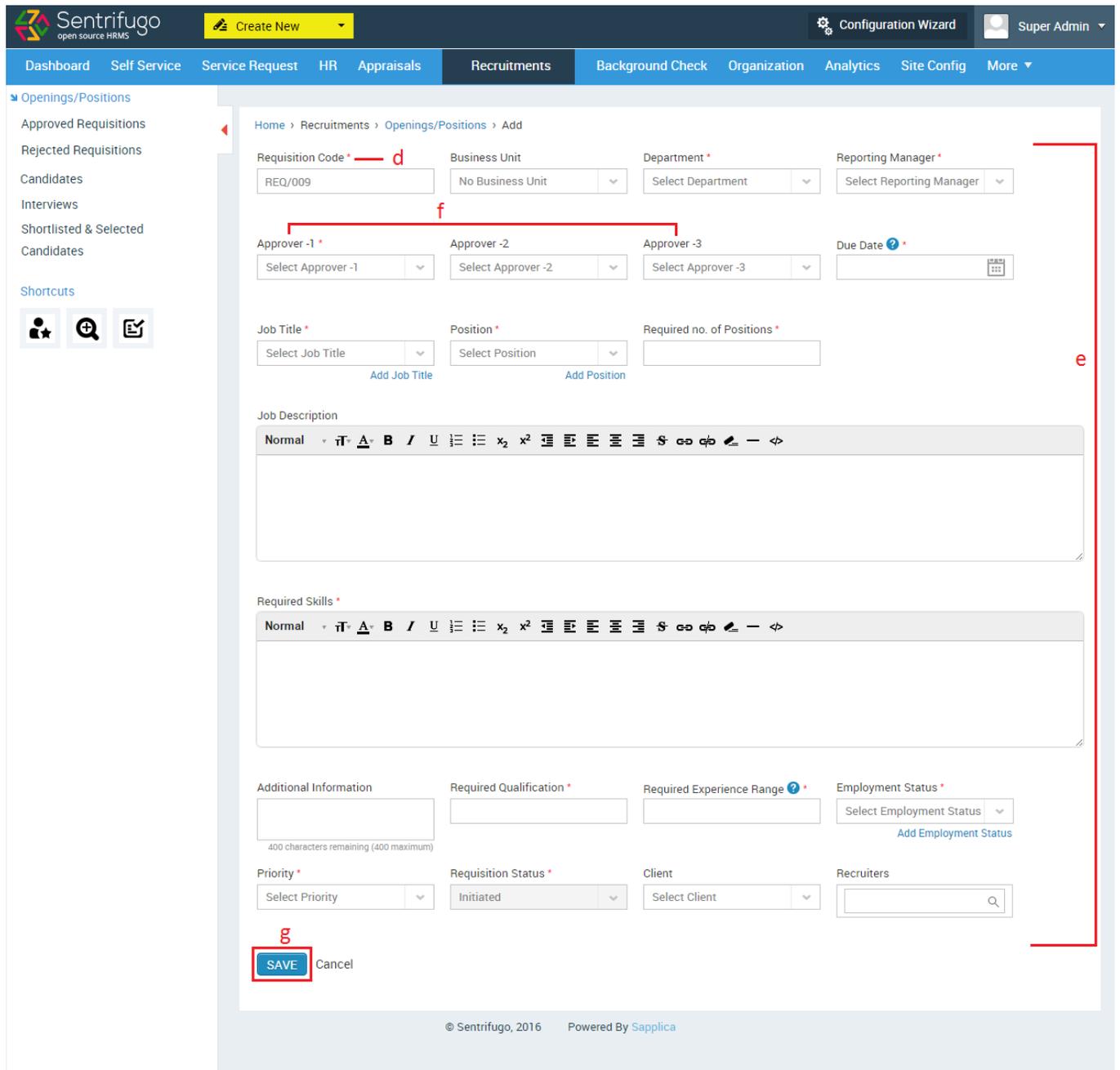
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments' (highlighted with a red box 'a'), 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar menu includes 'Openings/Positions' (highlighted with a red box 'b'), 'Approved Requisitions', 'Rejected Requisitions', 'Candidates', 'Interviews', 'Shortlisted & Selected', and 'Candidates'. 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 '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 * 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

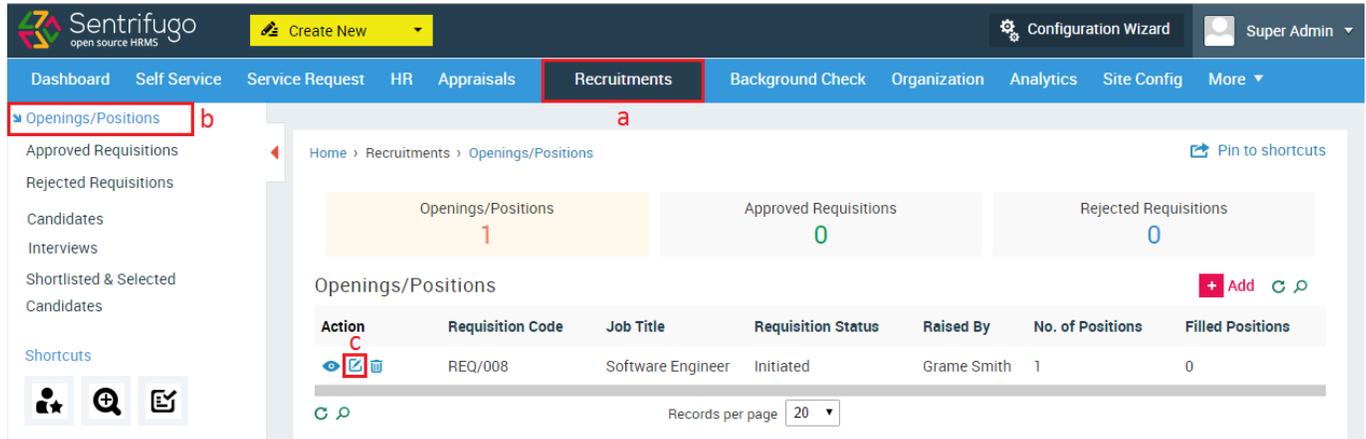
g Cancel

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

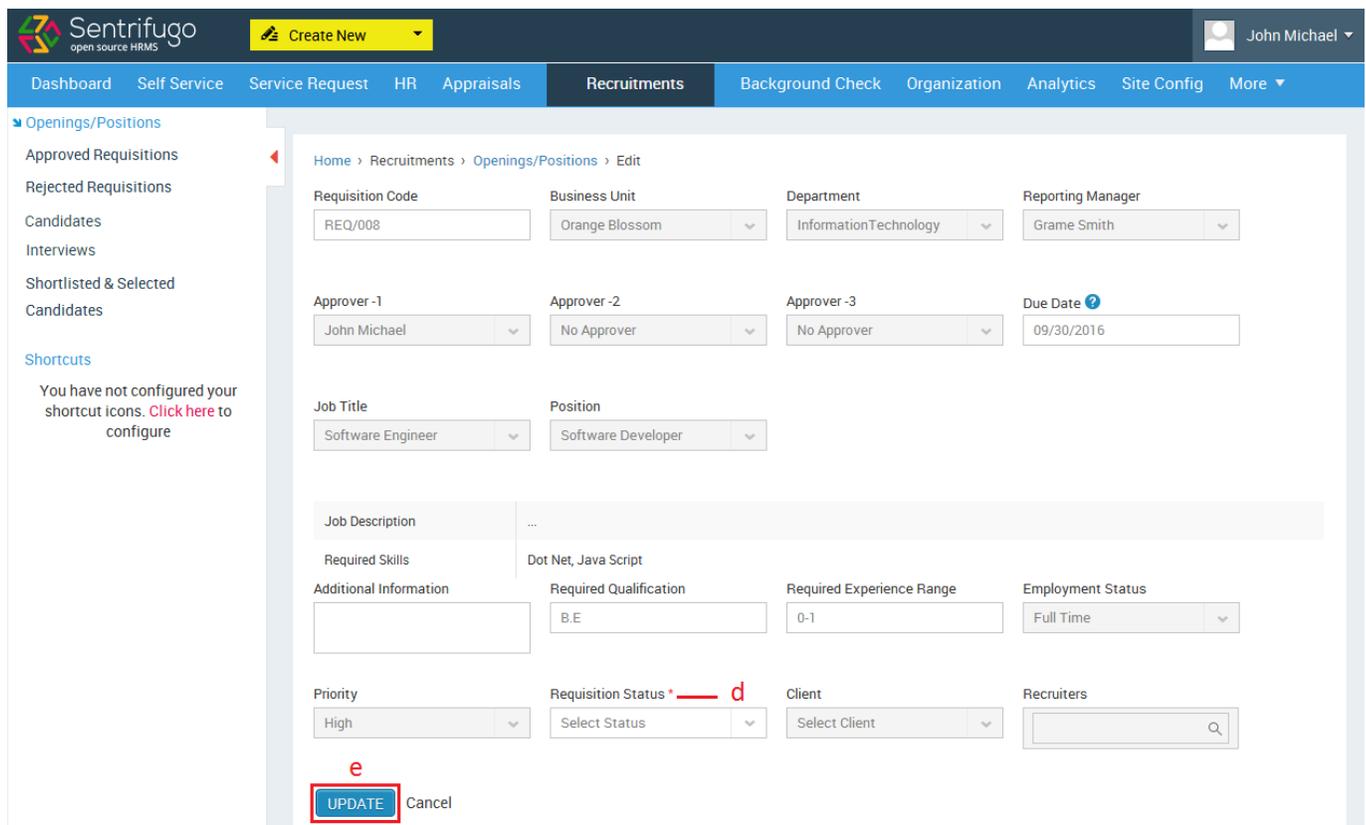


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The 'Recruitments' menu item is highlighted with a red box and labeled 'a'. On the left sidebar, 'Openings/Positions' is highlighted with a red box and labeled 'b'. The main content area shows a summary of 'Openings/Positions' (1), 'Approved Requisitions' (0), and 'Rejected Requisitions' (0). Below this is a table with columns: Action, Requisition Code, Job Title, Requisition Status, Raised By, No. of Positions, and Filled Positions. A single record is shown for 'REQ/008' with Job Title 'Software Engineer' and Status 'Initiated'. The 'Action' column for this record has an 'Edit' icon highlighted with a red box and labeled 'c'. At the bottom right of the table, there is a 'Records per page' dropdown set to 20.

Figure 101

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

Please refer Figure 102



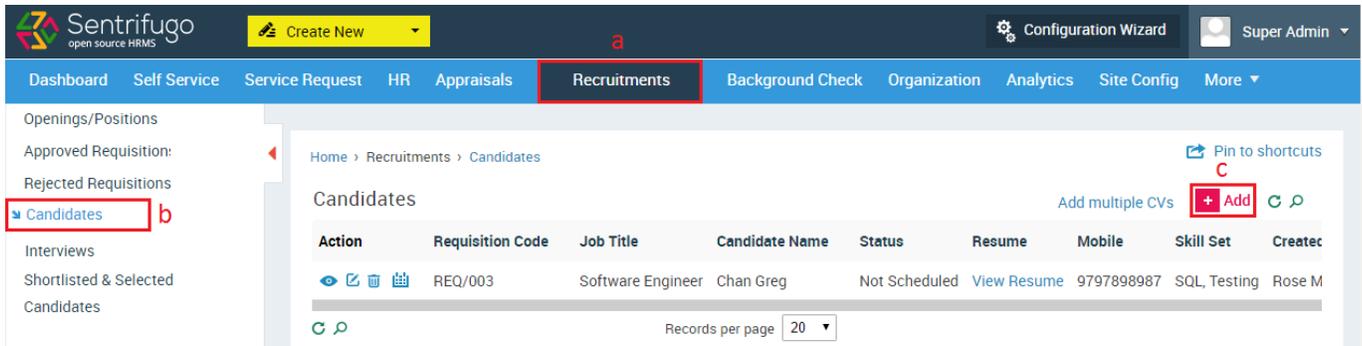
The screenshot shows the 'Edit' form for a Requisition in Sentrifugo HRMS. The top navigation bar is the same as in Figure 101. The left sidebar shows 'Openings/Positions' selected. The main content area is titled 'Home > Recruitments > Openings/Positions > Edit'. The form contains several fields: 'Requisition Code' (REQ/008), 'Business Unit' (Orange Blossom), 'Department' (InformationTechnology), and 'Reporting Manager' (Game Smith). Below these are 'Approver -1' (John Michael), 'Approver -2' (No Approver), 'Approver -3' (No Approver), and 'Due Date' (09/30/2016). Further down are 'Job Title' (Software Engineer) and 'Position' (Software Developer). A 'Job Description' field is empty. 'Required Skills' is 'Dot Net, Java Script'. 'Additional Information' is empty. 'Required Qualification' is 'B.E', 'Required Experience Range' is '0-1', and 'Employment Status' is 'Full Time'. At the bottom, 'Priority' is 'High', 'Requisition Status' is 'Select Status' (highlighted with a red line and labeled 'd'), 'Client' is 'Select Client', and 'Recruiters' is empty. At the bottom left, there is an 'UPDATE' button highlighted with a red box and labeled 'e', and a 'Cancel' button next to it.

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

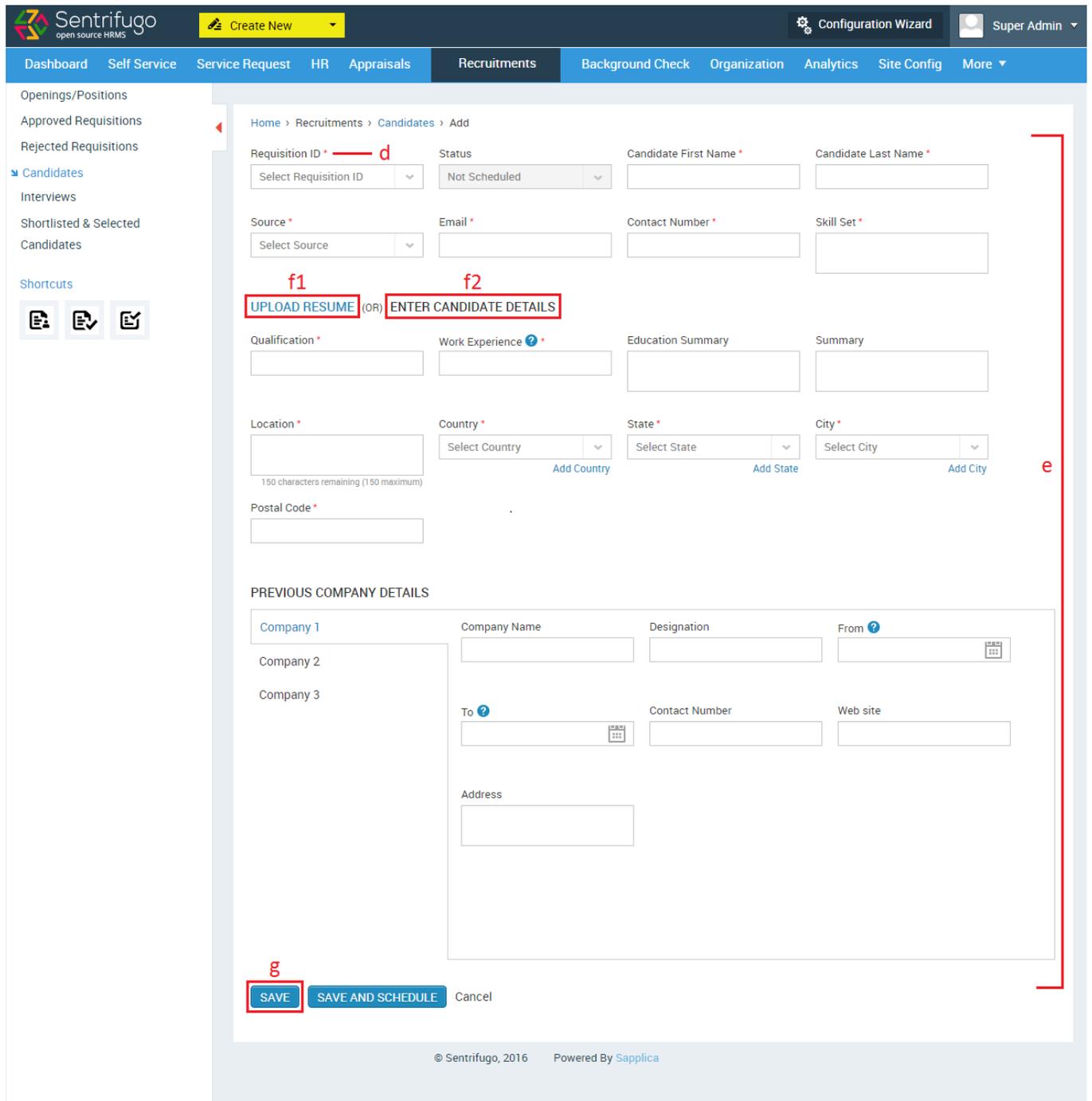


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The 'Recruitments' menu item is highlighted with a red box 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 table has columns for 'Action', 'Requisition Code', 'Job Title', 'Candidate Name', 'Status', 'Resume', 'Mobile', 'Skill Set', and 'Createc'. A red box highlights the '+ Add' button in the top right corner of the table, labeled 'c'. Below the table, there is a 'Records per page' dropdown menu set to '20'.

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

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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

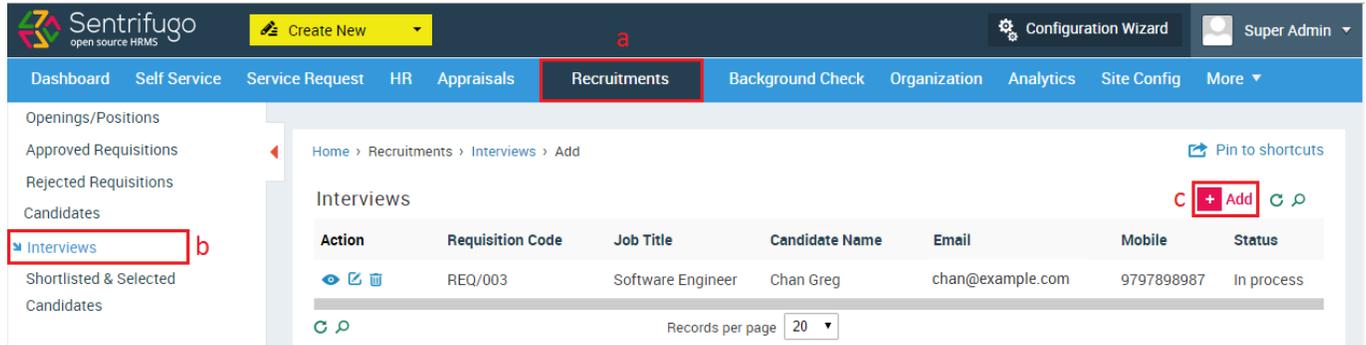


Figure 105

- 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

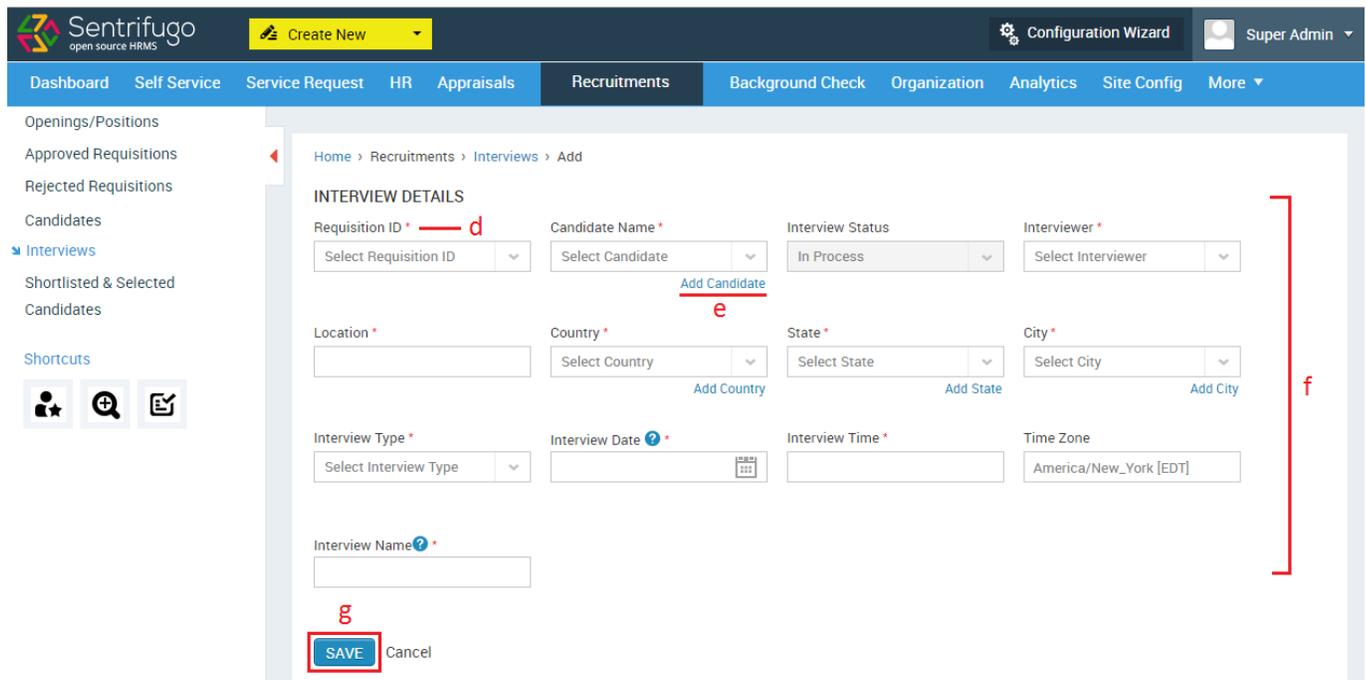


Figure 106

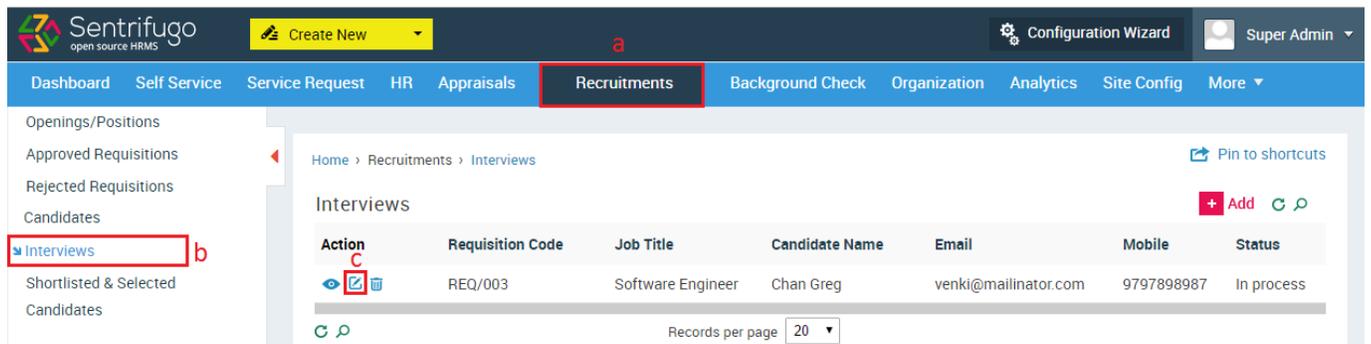
- d. Select the Requisition ID
- e. Add candidate details if they aren't added

- 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



Home > Recruitments > Interviews

Interviews + Add

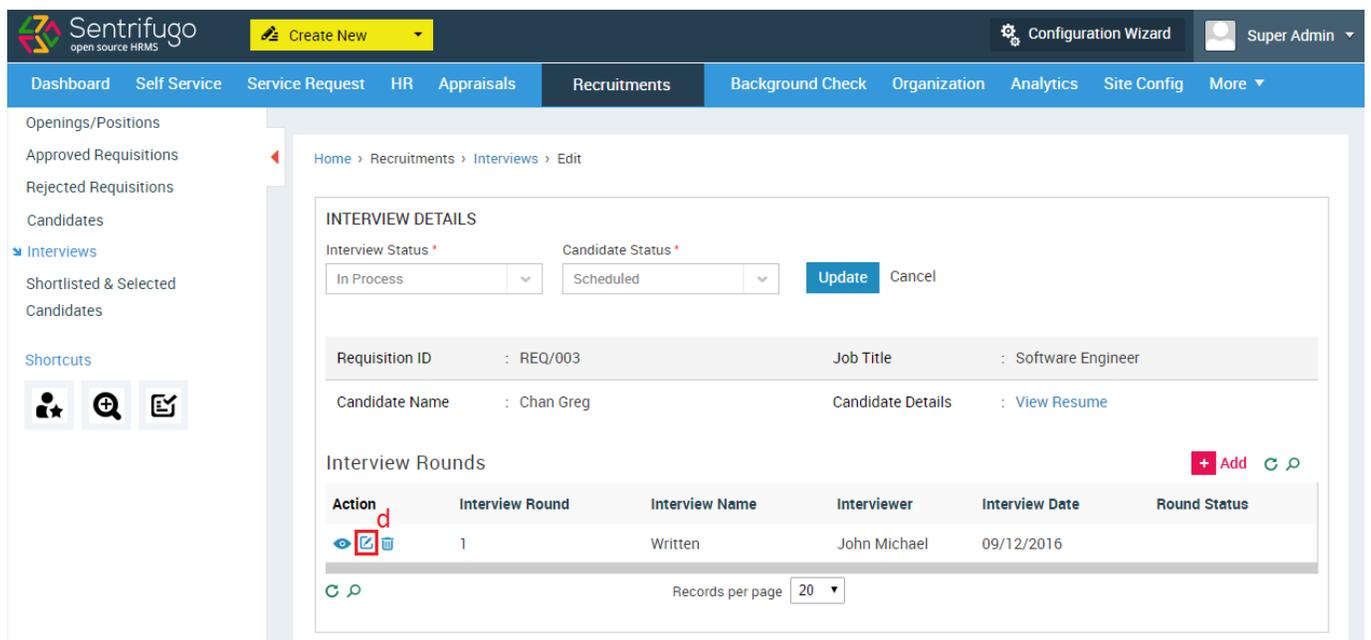
Action	Requisition Code	Job Title	Candidate Name	Email	Mobile	Status
	REQ/003	Software Engineer	Chan Greg	venki@mailinator.com	9797898987	In process

Records per page 20

Figure 107

- a. Click **Recruitments** menu option
- b. Click **Interviews** on the left side panel
- c. Click **Edit** icon against an interview

Please refer Figure 108



Home > Recruitments > Interviews > Edit

INTERVIEW DETAILS

Interview Status * Candidate Status * Update Cancel

Requisition ID : REQ/003 Job Title : Software Engineer

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

Interview Rounds + Add

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

Records per page 20

Figure 108

- d. 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	Interviewer Comments
Result Status * Select Status ▾		

f

UPDATE Cancel

e

Figure 109

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

Please refer Figure 110

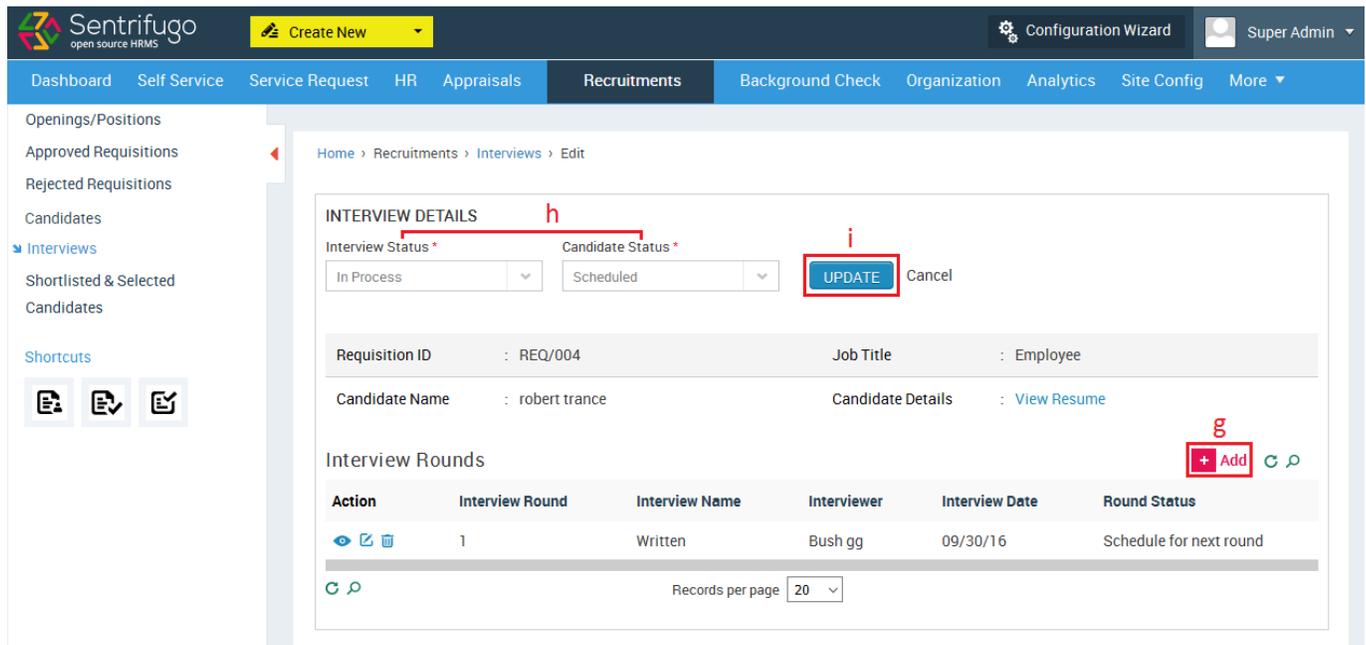


Figure 110

- 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

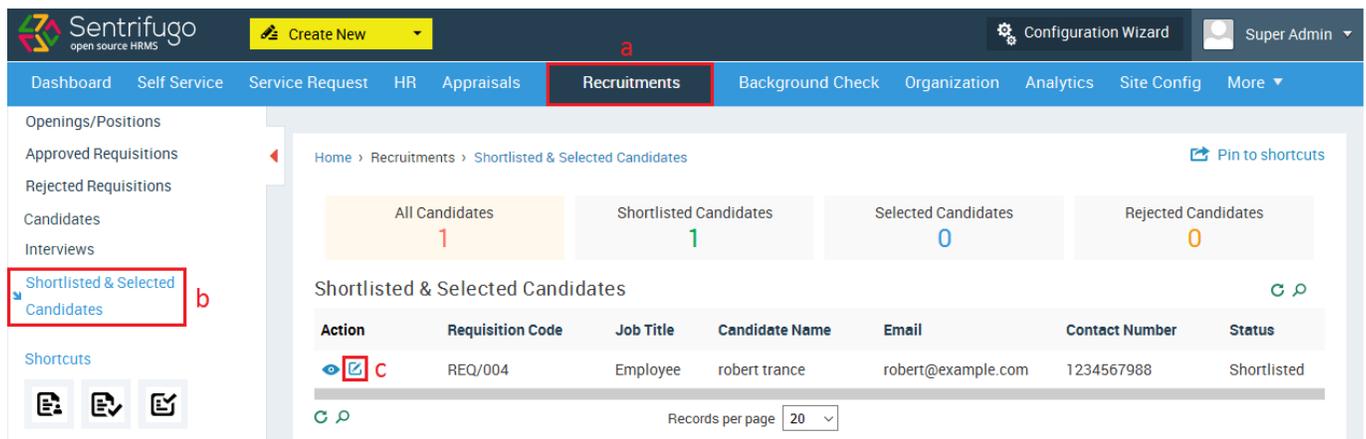


Figure 111

- 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

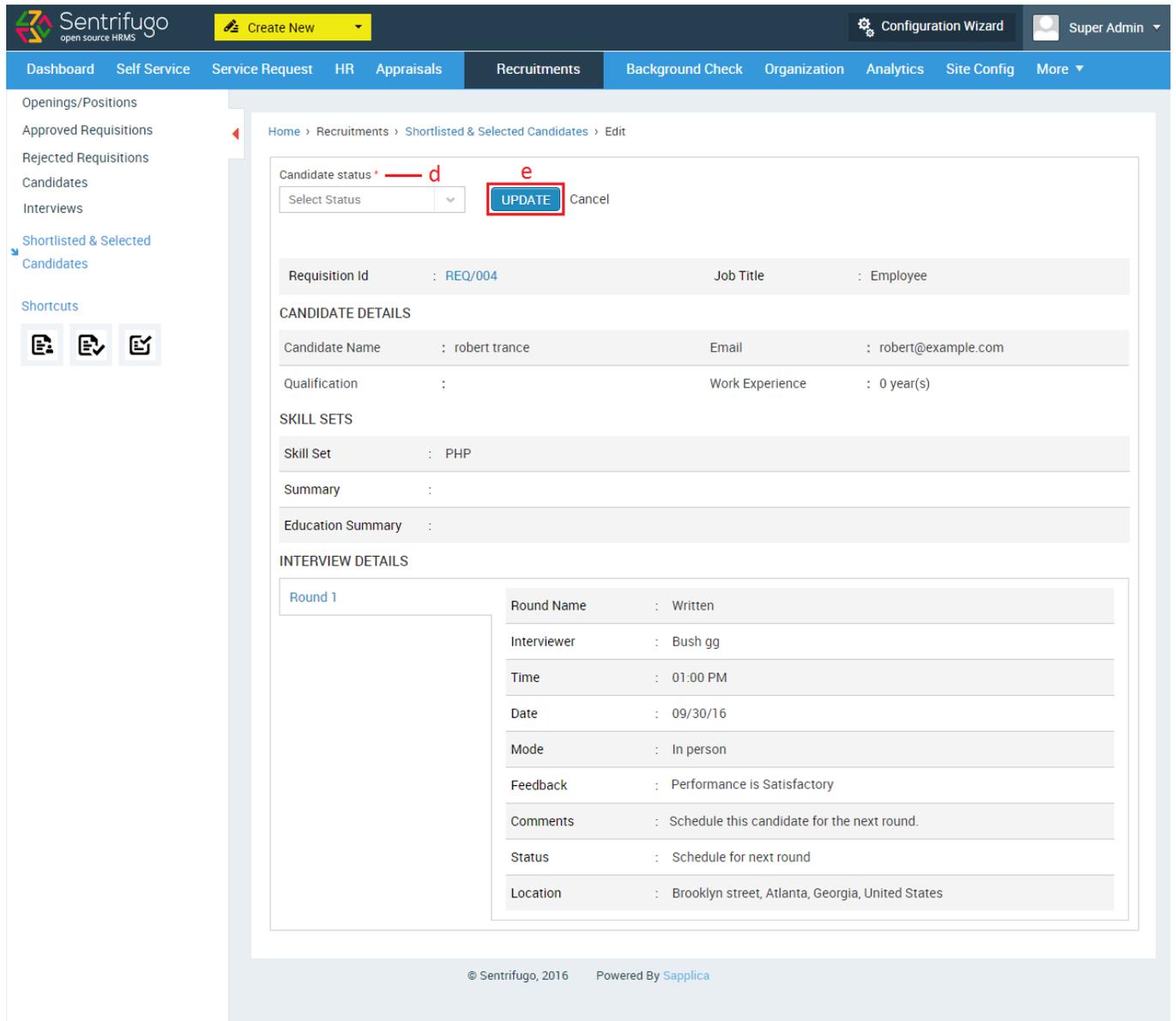


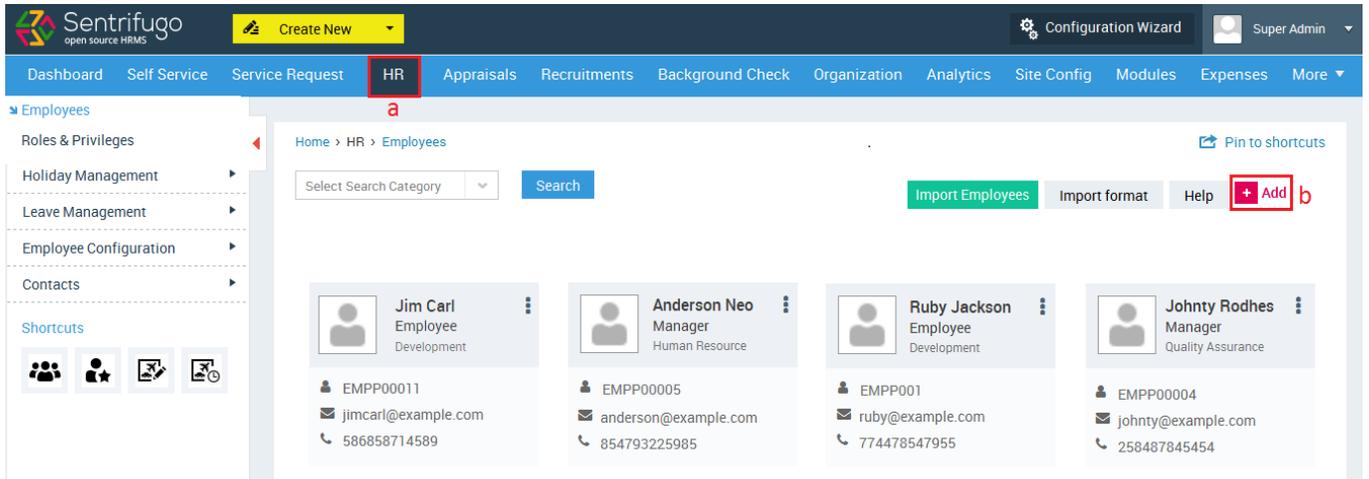
Figure 112

- 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', 'Modules', 'Expenses', and 'More'. The 'HR' menu item is highlighted with a red box and labeled 'a'. Below the navigation bar, the 'Employees' section is active, showing a search bar, 'Import Employees', 'Import format', 'Help', and a '+Add' button highlighted with a red box and labeled 'b'. The main content area displays four employee cards: Jim Carl (Employee, Development), Anderson Neo (Manager, Human Resource), Ruby Jackson (Employee, Development), and Johnty Rodhes (Manager, Quality Assurance). Each card includes contact information such as email and phone number.

Figure 113

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

Please refer Figure 114

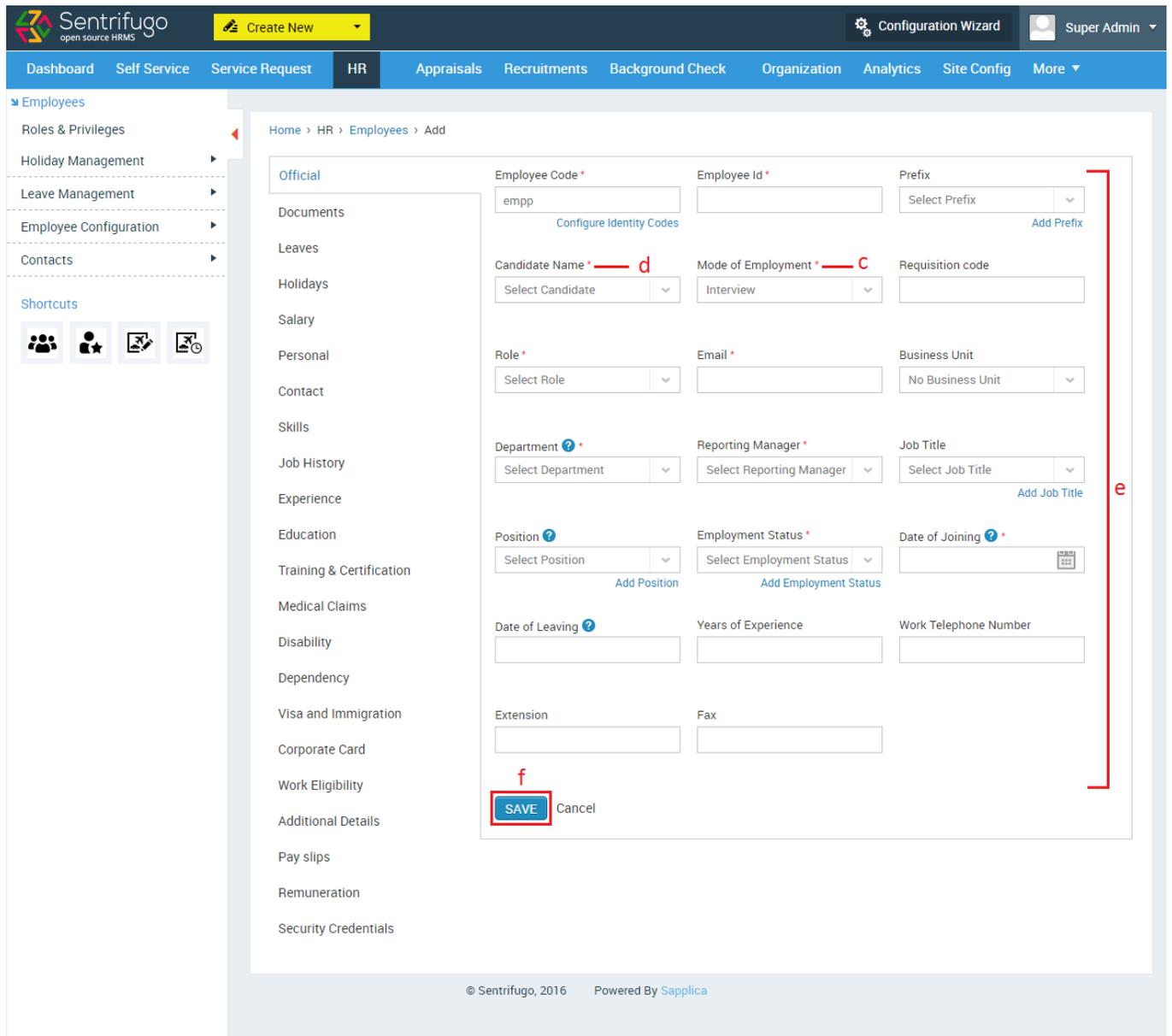


Figure 114

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

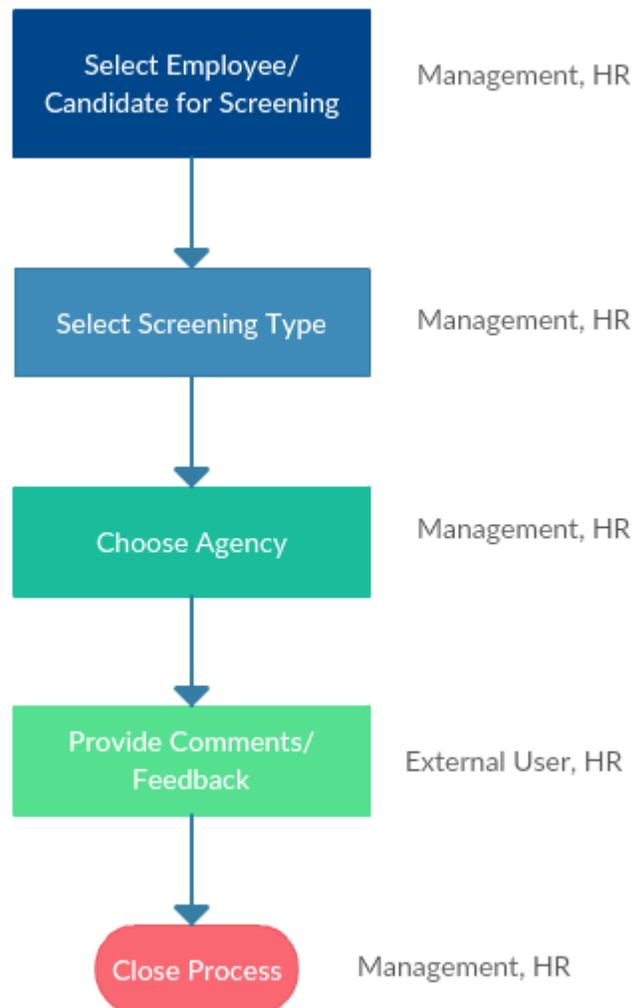
-  Requisition status has been changed as Approved by Anderson Neo
 2016-12-19 11:23 PM

-  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

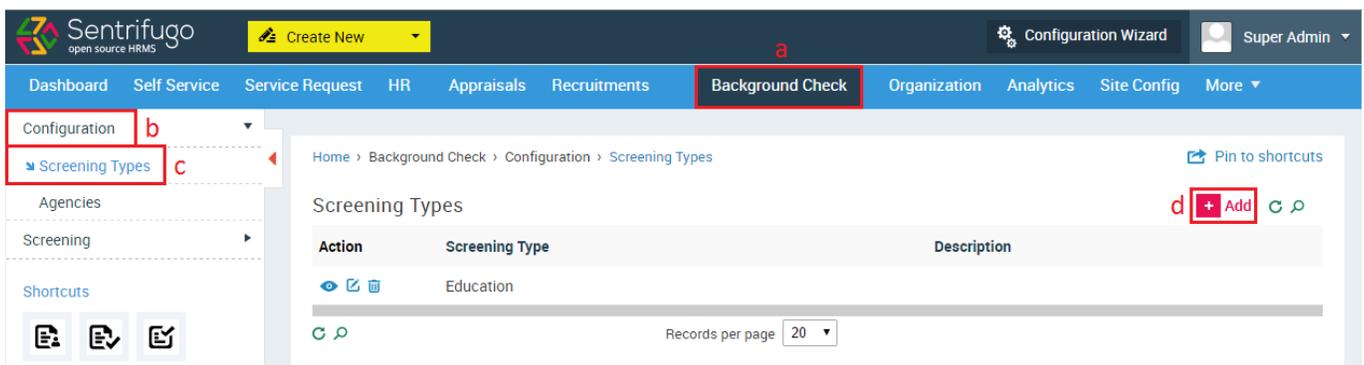


Figure 115

- 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

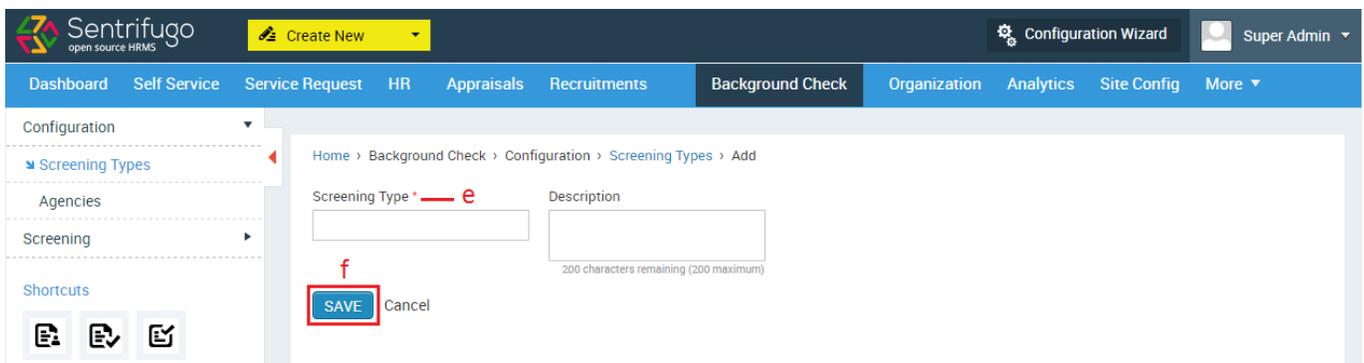
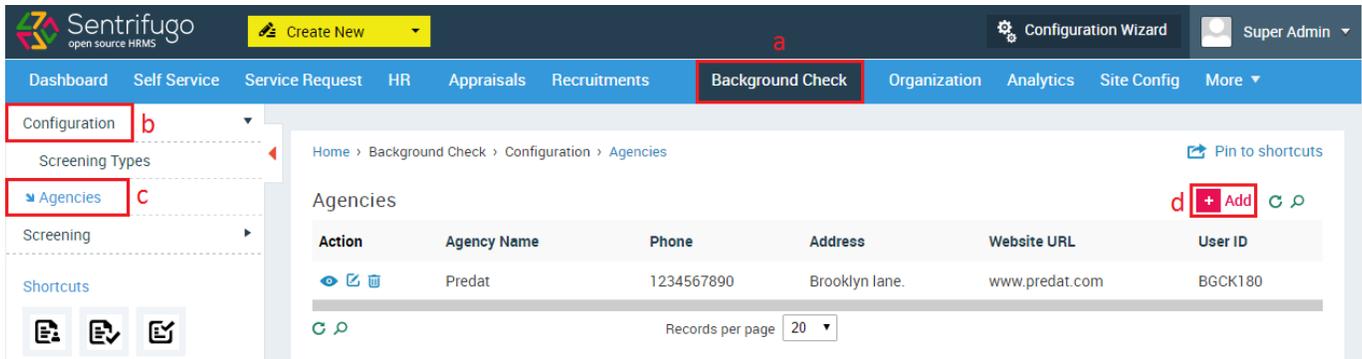


Figure 116

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

8.2 How do I add an Agency?

Please refer Figure 117

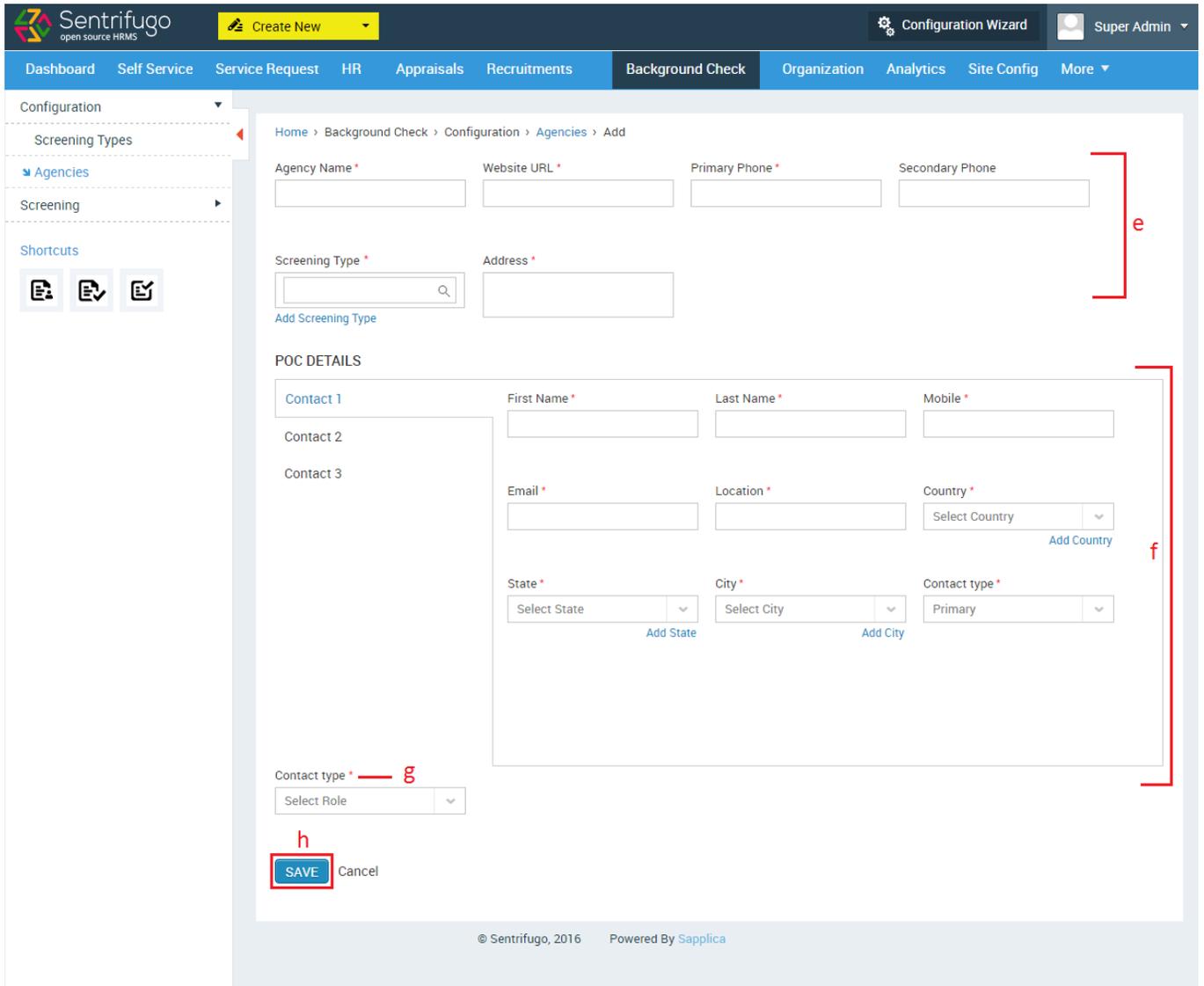


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check' (highlighted with 'a'), 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar menu has 'Configuration' (highlighted with 'b'), 'Screening Types', 'Agencies' (highlighted with 'c'), and 'Screening'. The main content area shows the 'Agencies' configuration page with a table containing one entry: 'Predat' with phone '1234567890', address 'Brooklyn lane.', website 'www.predat.com', and user ID 'BGCK180'. A '+Add' button (highlighted with 'd') is visible in the top right of the table area. The breadcrumb path is 'Home > Background Check > Configuration > Agencies'.

Figure 117

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

Please refer Figure 118



Configuration Wizard Super Admin

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

Configuration

- Screening Types
- Agencies**
- Screening

Shortcuts

Home > Background Check > Configuration > Agencies > Add

Agency Name * Website URL * Primary Phone * Secondary Phone

Screening Type * Address *

Add Screening Type

POC DETAILS

Contact 1 First Name * Last Name * Mobile *

Contact 2 Email * Location * Country * Add Country

Contact 3 State * City * Contact type * Add State Add City

Contact type * **g**

Select Role

h SAVE Cancel

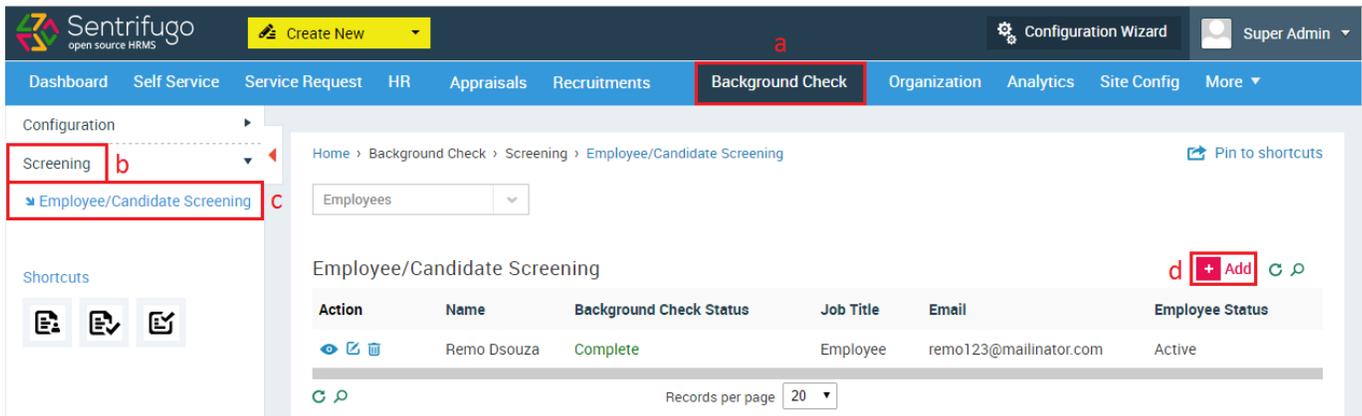
© Sentrifugo, 2016 Powered By Sapplica

Figure 118

- Enter the required details
- Enter POC (Point of Contact) details
- 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](#))
- Click **SAVE** button

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

Please refer Figure 119



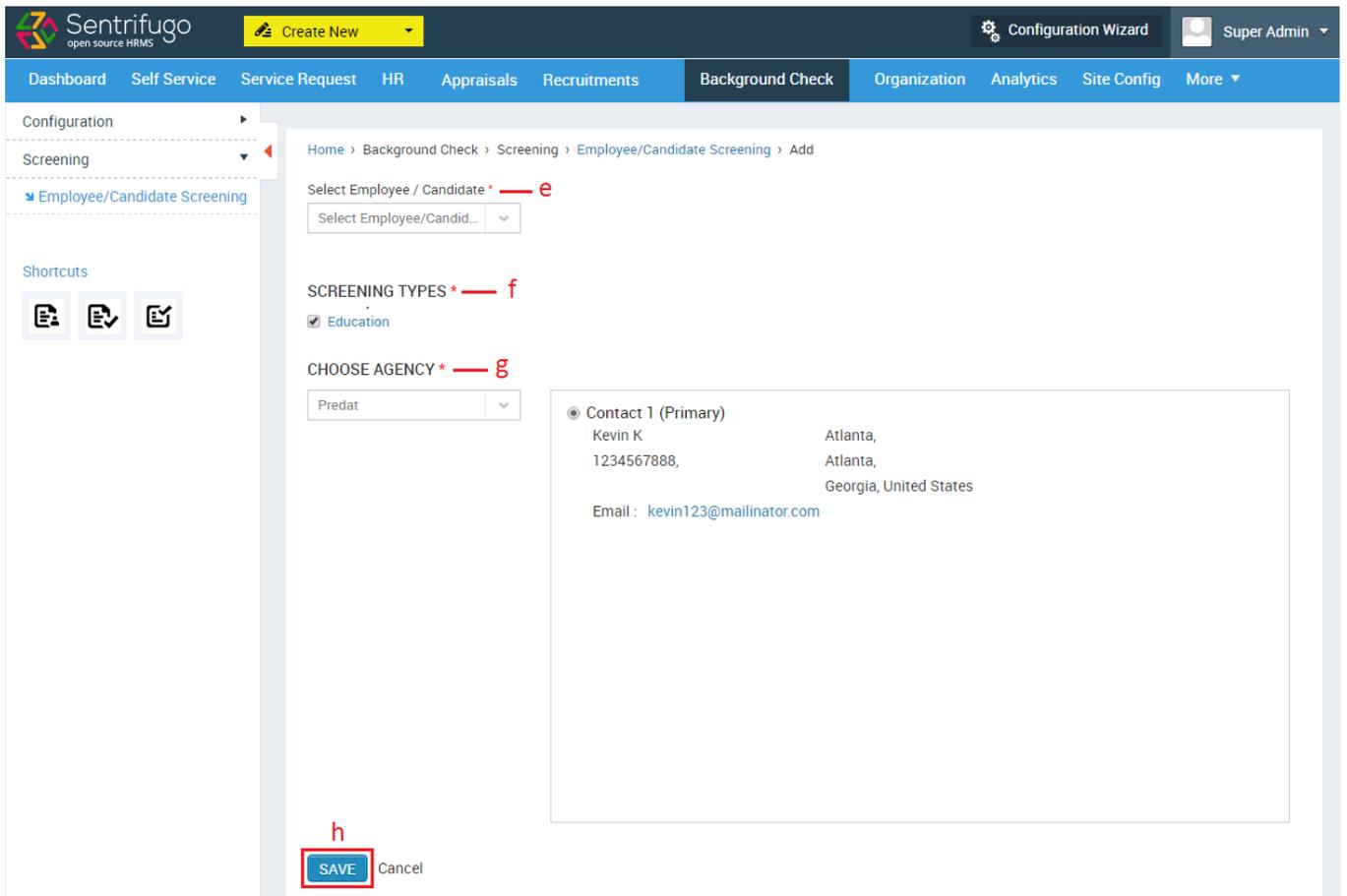
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The 'Background Check' menu item is highlighted with a red box and labeled 'a'. The left sidebar menu shows 'Configuration' with a sub-menu 'Screening' highlighted with a red box and labeled 'b'. Under 'Screening', 'Employee/Candidate Screening' is 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 the page title, there is a '+ Add' button highlighted with a red box and labeled 'd'. A table lists screening records with columns for Action, Name, Background Check Status, Job Title, Email, and Employee Status. One record is shown for Remo Dsouza with a status of 'Complete'.

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

Figure 119

- 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 **+Add** button on the right side

Please refer Figure 120



Configuration Wizard Super Admin

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

Configuration

Screening

Employee/Candidate Screening

Shortcuts

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

Select Employee / Candidate * — e

Select Employee/Candid...

SCREENING TYPES * — f

Education

CHOOSE AGENCY * — g

Predat

Contact 1 (Primary)
Kevin K Atlanta,
1234567888, Atlanta,
Georgia, United States
Email : kevin123@mailinator.com

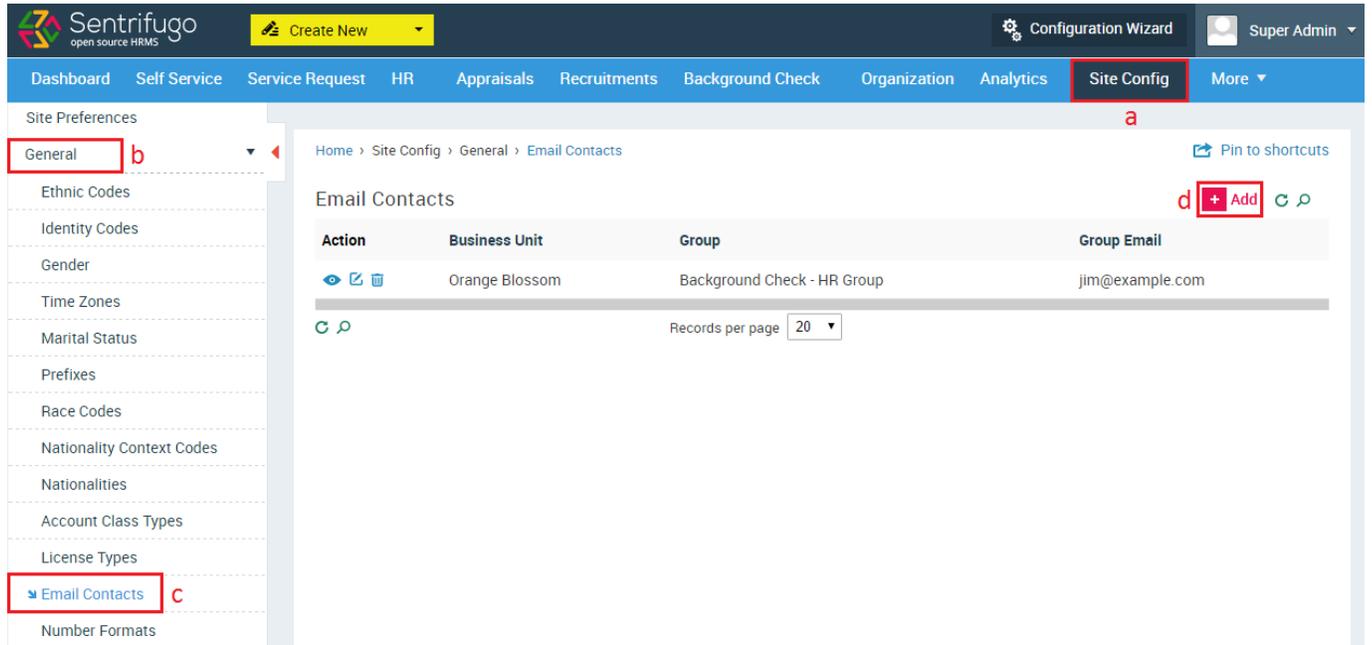
h
SAVE Cancel

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 user interface. At the top, there is a navigation bar with 'Site Config' highlighted. On the left, a 'Site Preferences' sidebar has 'General' and 'Email Contacts' highlighted. The main content area shows the 'Email Contacts' configuration page with a table containing one entry and an '+Add' button.

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

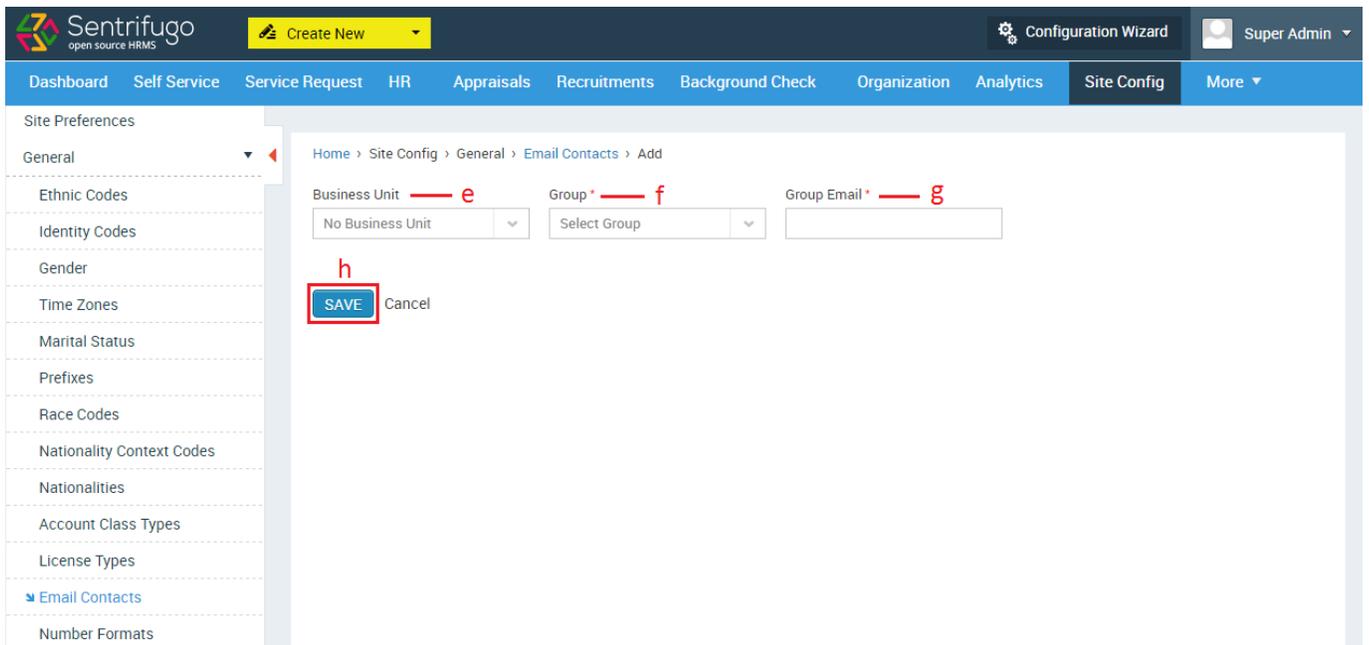


Figure 122

- 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

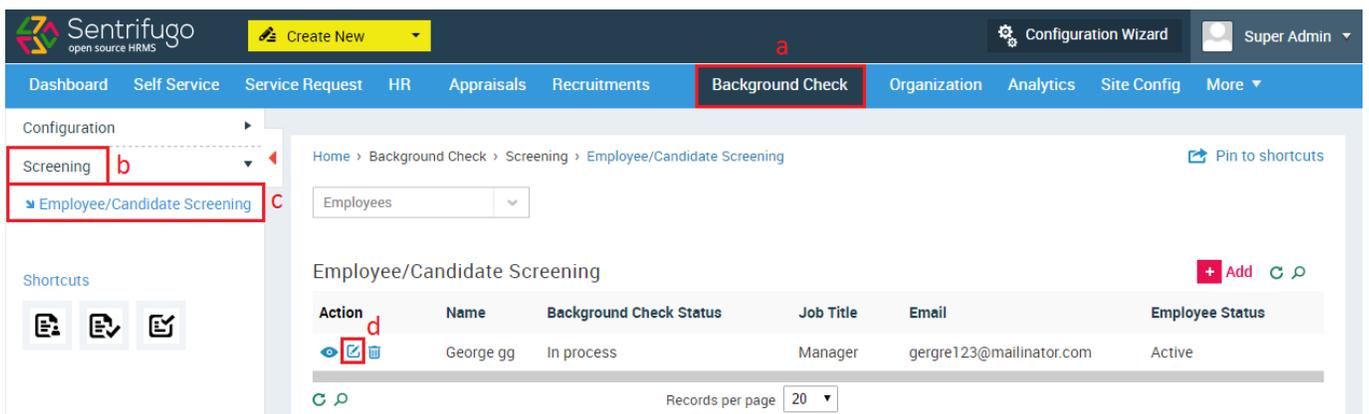
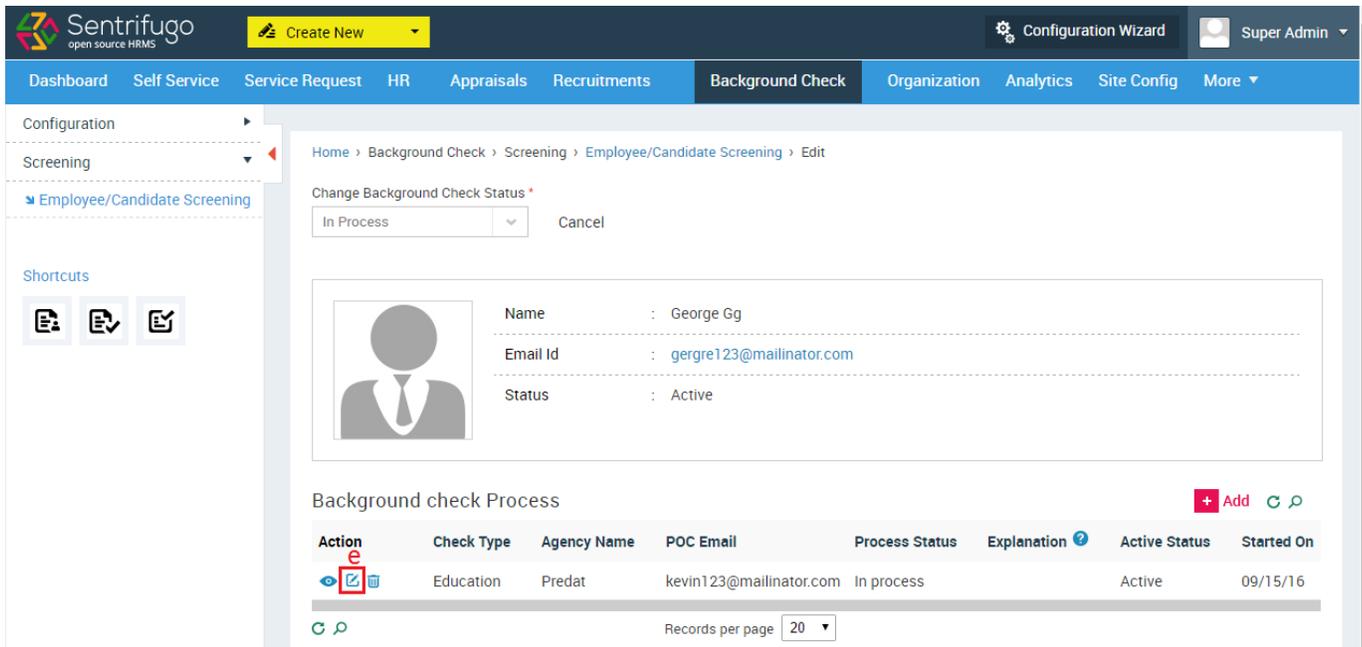


Figure 123

- 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

Upload Feedback File

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

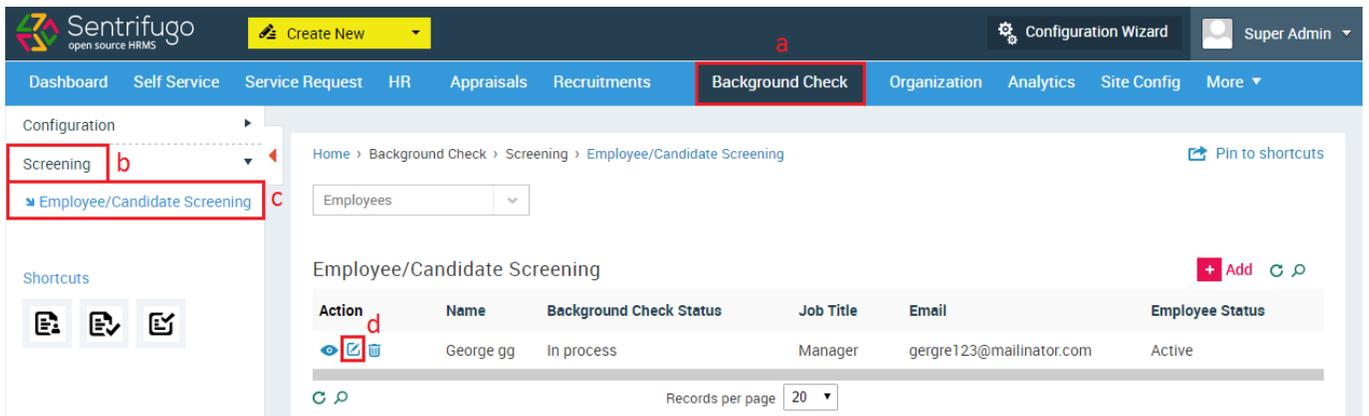


Figure 126

- 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

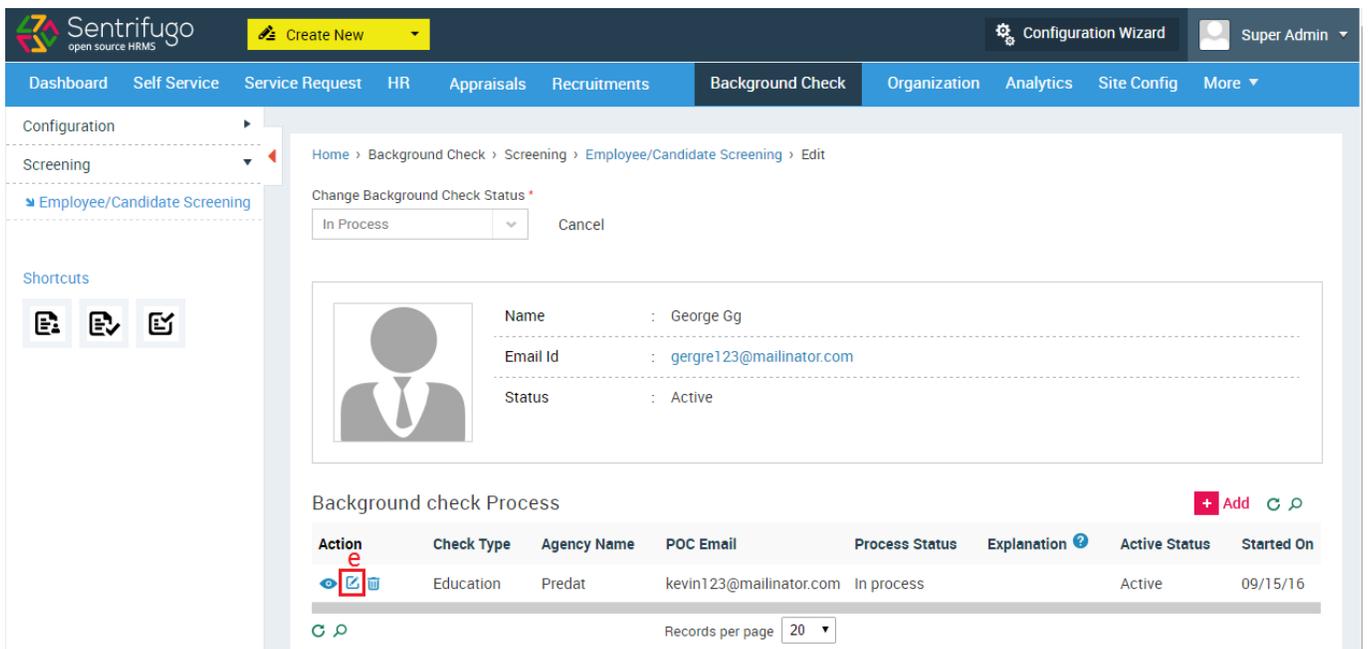


Figure 127

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

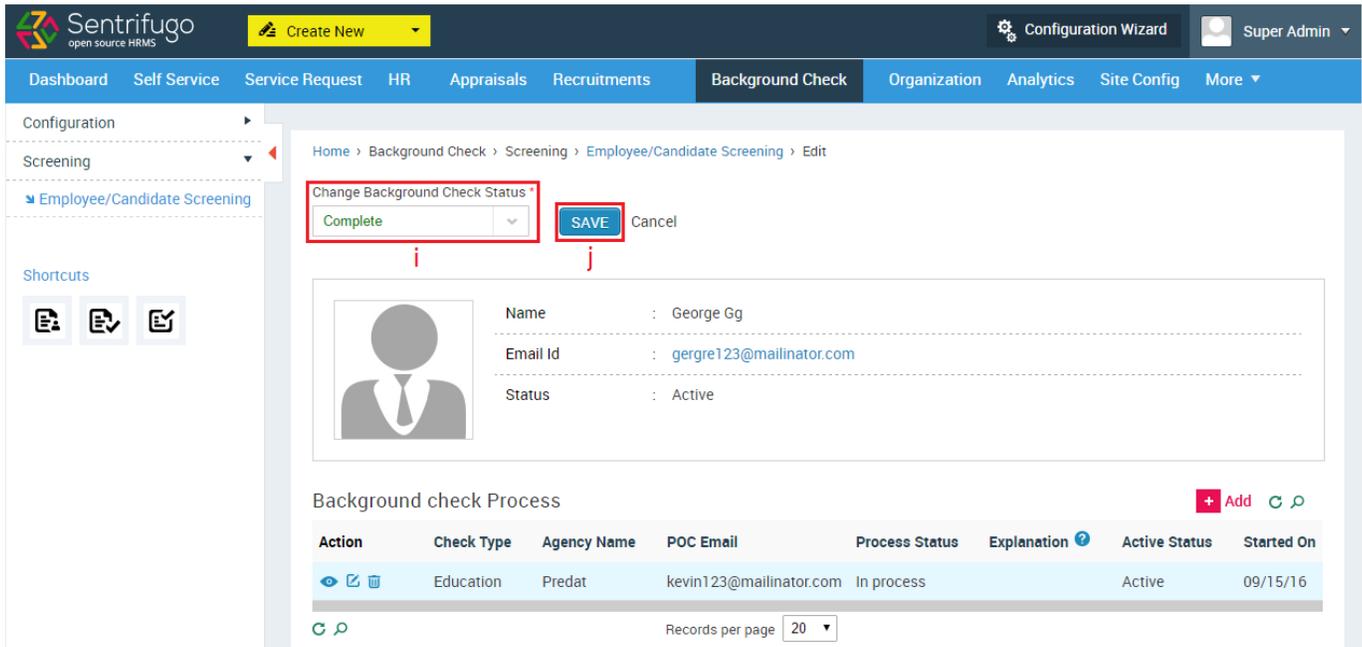
POST

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

Status : Active

Background check Process + Add ↻

Action	Check Type	Agency Name	POC Email	Process Status	Explanation	Active Status	Started On
View Edit Delete	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

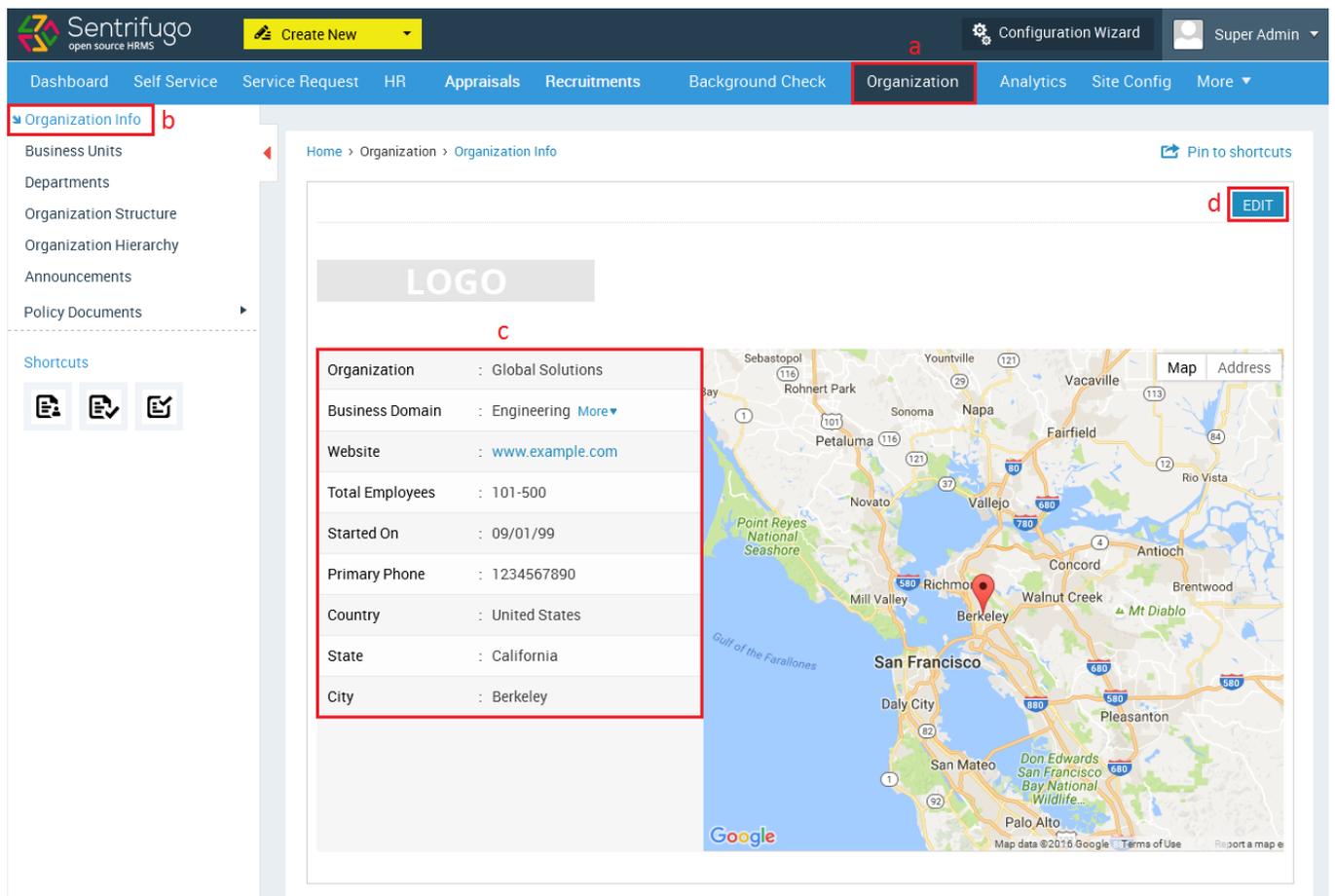
9. Organization

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



The screenshot shows the Sentrifugo web interface. The top navigation bar includes 'Organization' (a). The left sidebar has 'Organization Info' (b). The main content area displays the following organization details (c):

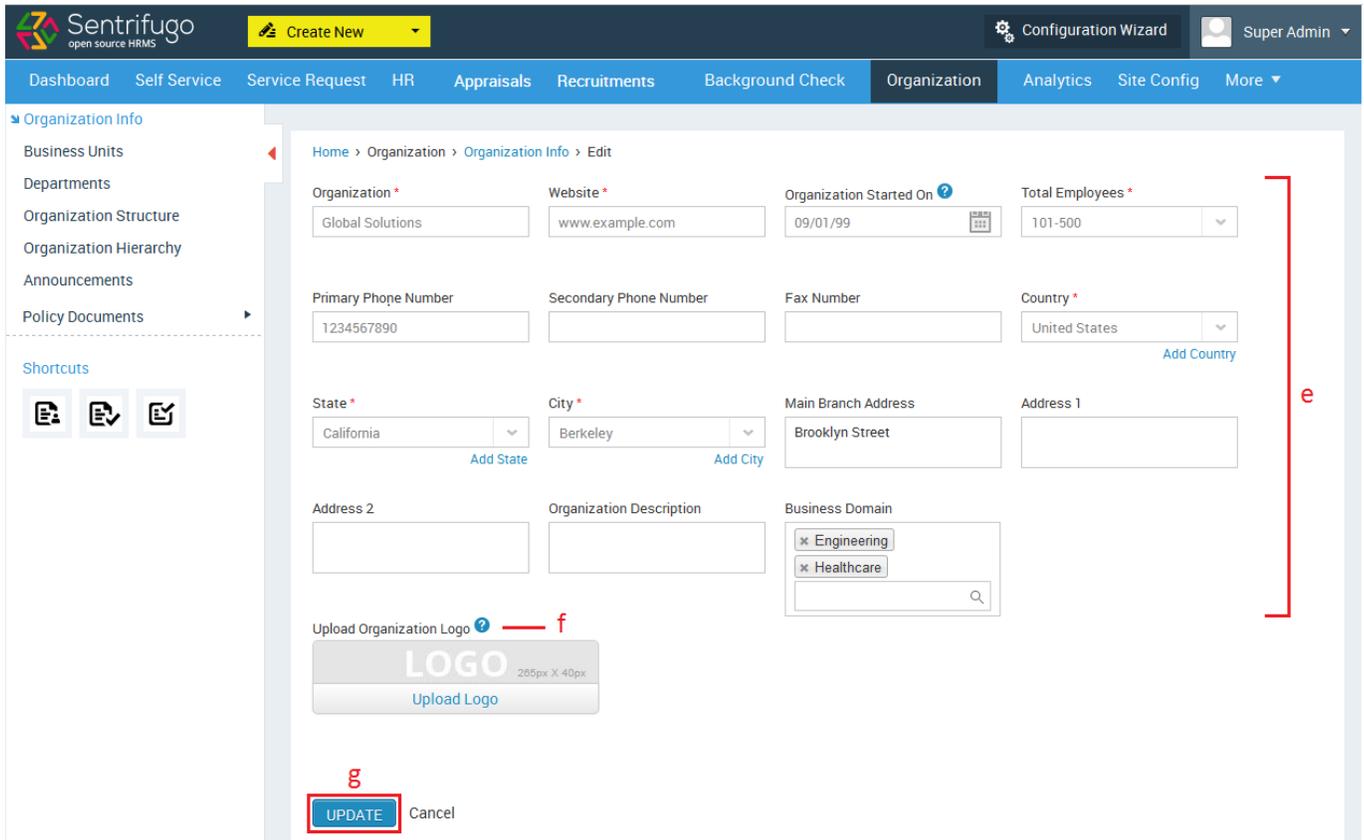
Organization	: Global Solutions
Business Domain	: Engineering More
Website	: www.example.com
Total Employees	: 101-500
Started On	: 09/01/99
Primary Phone	: 1234567890
Country	: United States
State	: California
City	: Berkeley

An 'EDIT' button (d) is visible in the top right corner of the details section. A map of the San Francisco Bay Area is shown on the right side of the page.

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



The screenshot shows the 'Edit Organization' page in Sentrifugo. The form includes the following fields and sections:

- Organization ***: Text input with value 'Global Solutions'
- Website ***: Text input with value 'www.example.com'
- Organization Started On ?**: Date picker with value '09/01/99'
- Total Employees ***: Dropdown menu with value '101-500'
- Primary Phone Number**: Text input with value '1234567890'
- Secondary Phone Number**: Text input
- Fax Number**: Text input
- Country ***: Dropdown menu with value 'United States' and a link 'Add Country'
- State ***: Dropdown menu with value 'California' and a link 'Add State'
- City ***: Dropdown menu with value 'Berkeley' and a link 'Add City'
- Main Branch Address**: Text input with value 'Brooklyn Street'
- Address 1**: Text input
- Address 2**: Text input
- Organization Description**: Text input
- Business Domain**: Tagged list containing 'Engineering' and 'Healthcare', with a search input below.
- Upload Organization Logo ?**: Section with a placeholder 'LOGO' (285px X 40px) and an 'Upload Logo' button.
- Buttons**: 'UPDATE' button (highlighted with a red box and labeled 'g') and 'Cancel' button.

A red bracket on the right side of the form is labeled 'e', indicating the area where details are entered or modified.

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

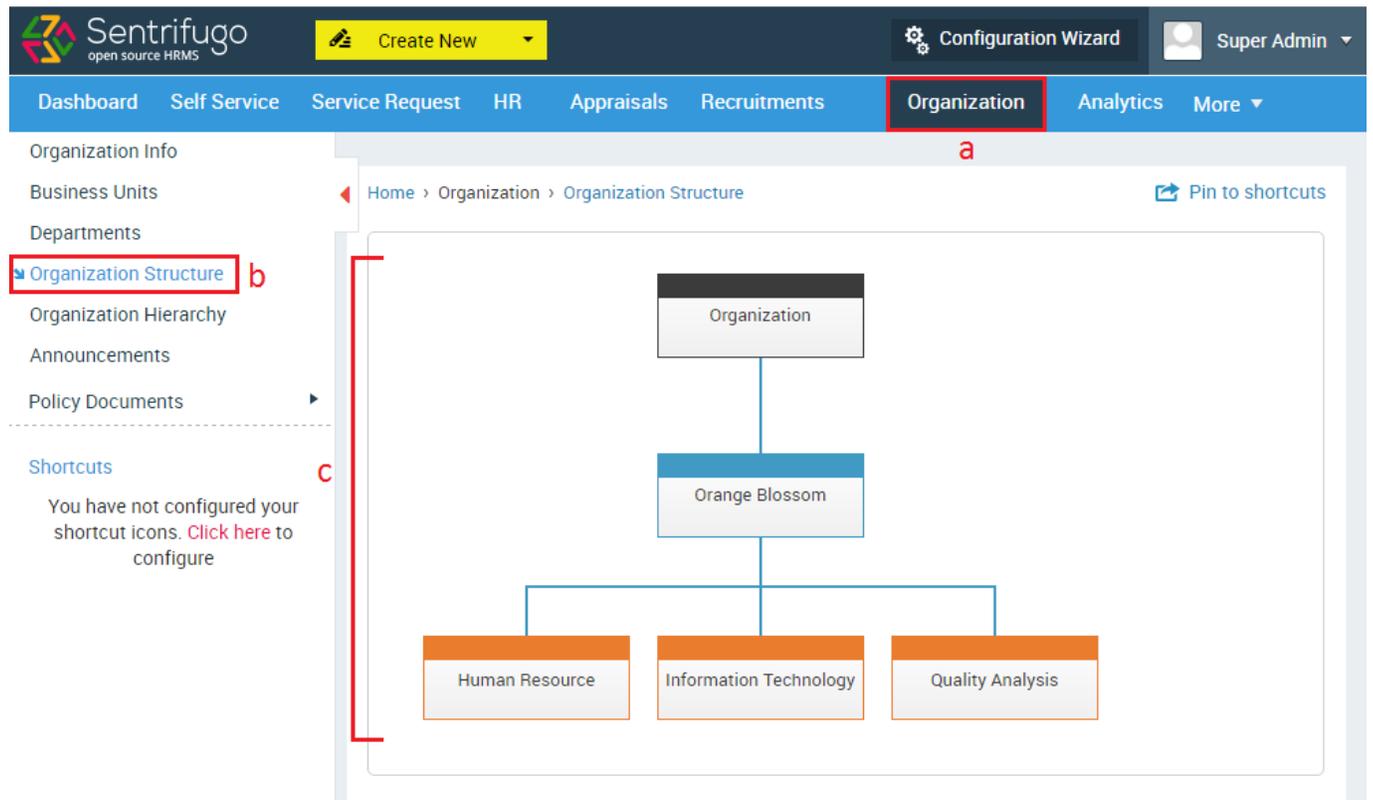


Figure 133

- 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

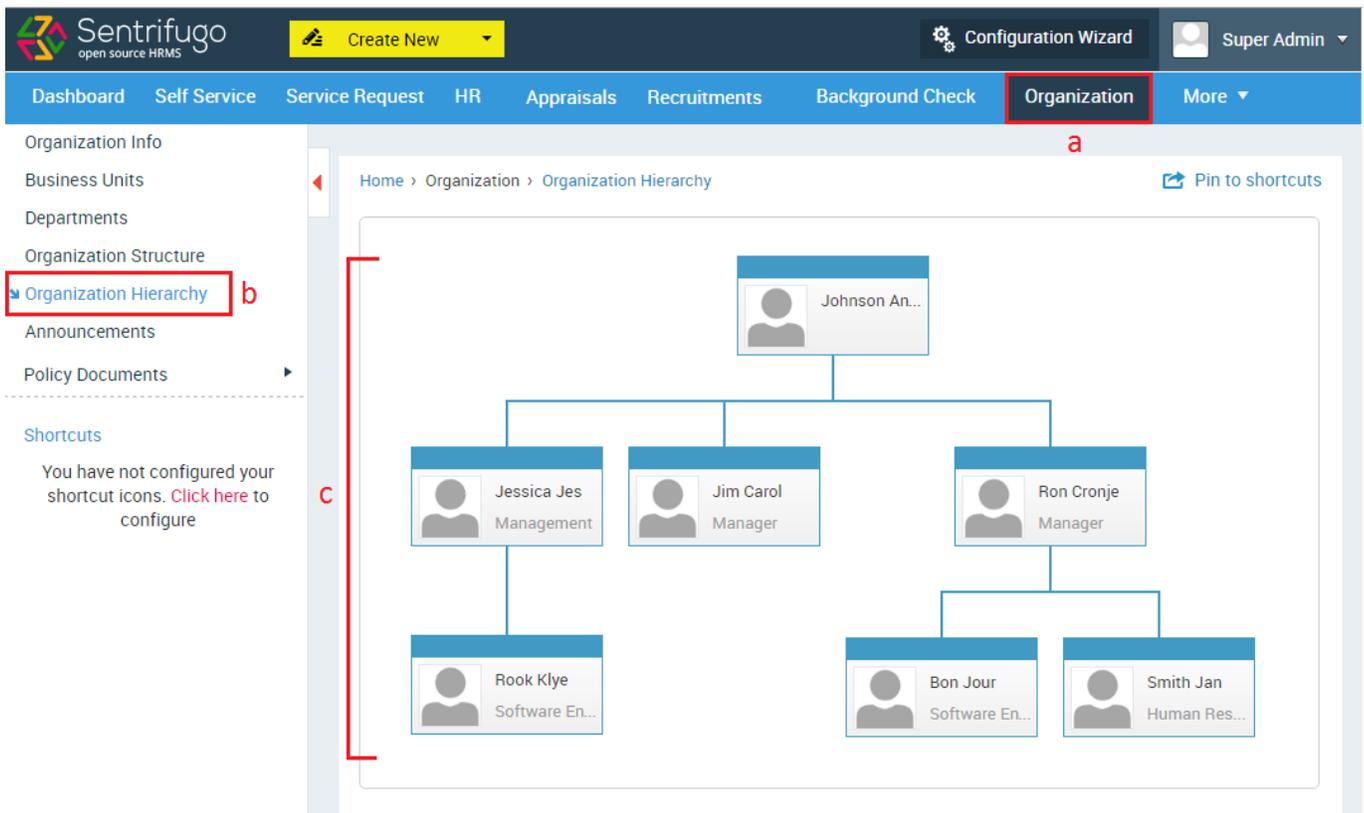


Figure 134

- 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

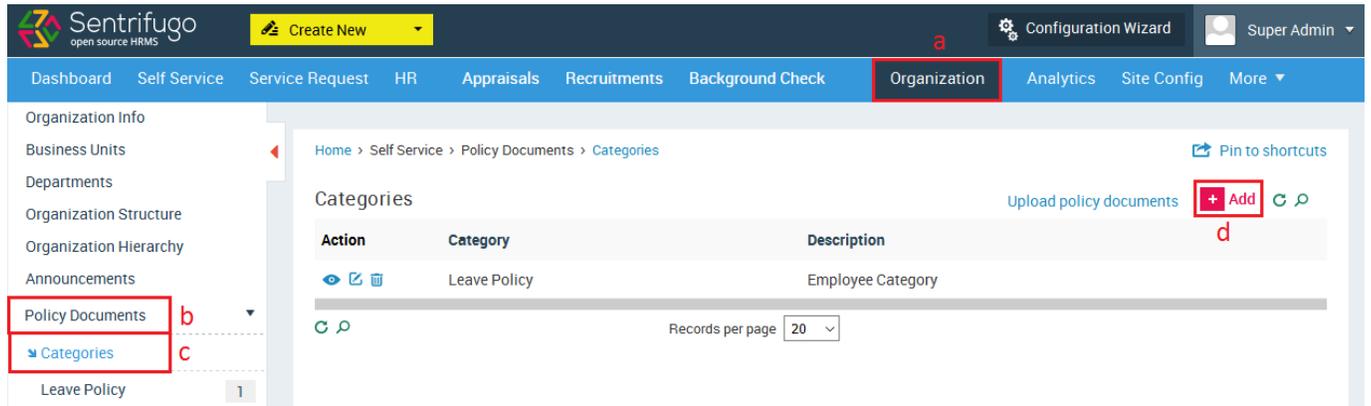


Figure 135

- 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

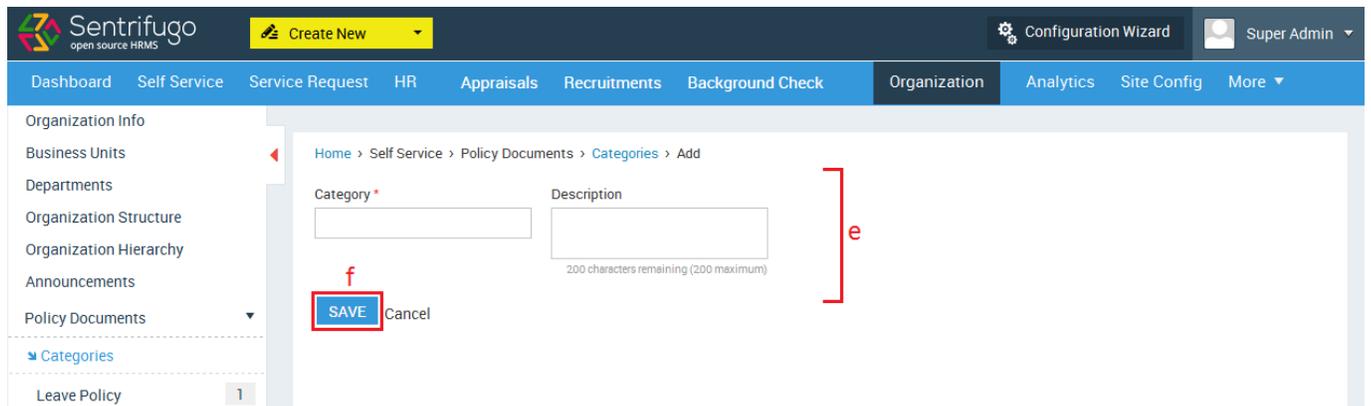


Figure 136

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

Please refer Figure 137

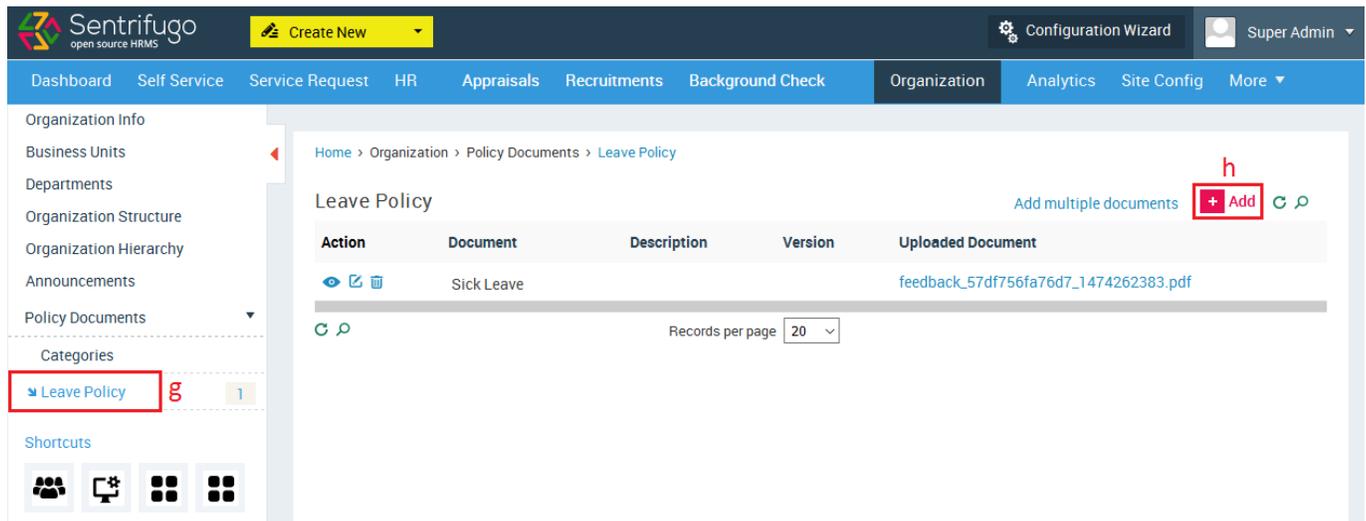


Figure 137

- 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

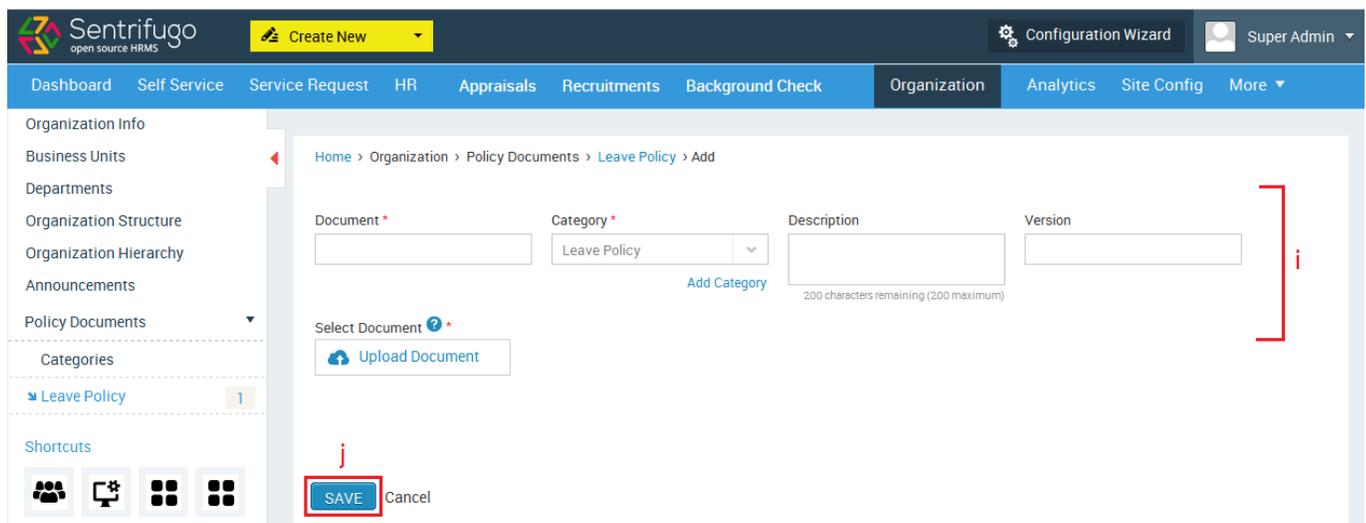
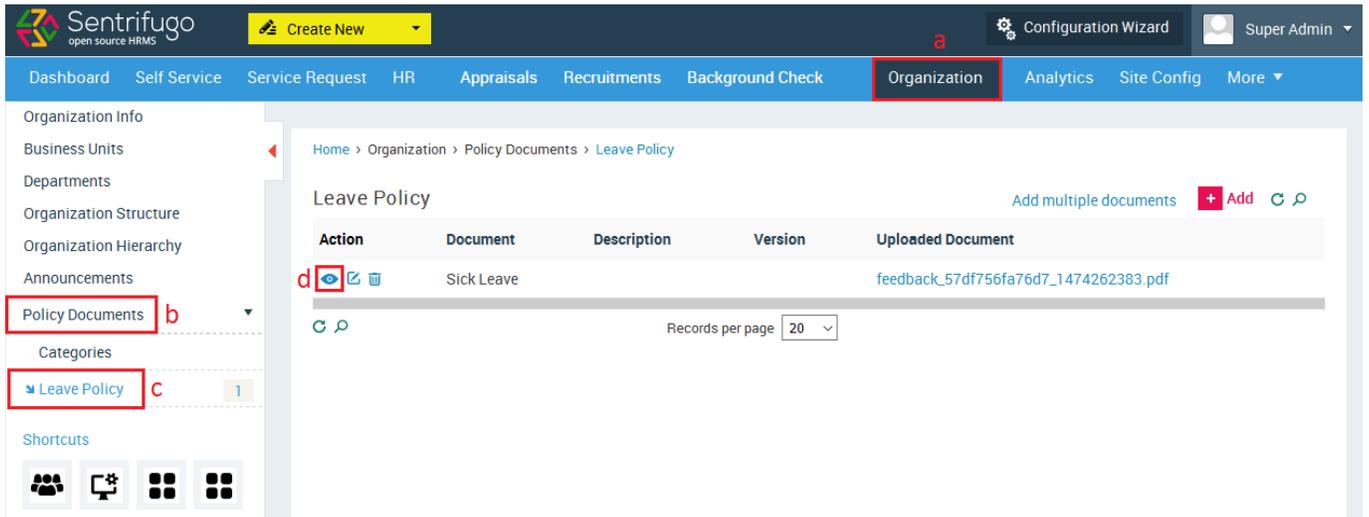


Figure 138

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

9.6 How do I view Policy Documents?

Please refer Figure 139



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 and labeled 'a'), 'Analytics', 'Site Config', and 'More'. The left sidebar contains a menu with 'Policy Documents' (highlighted with a red box and labeled 'b') and 'Leave Policy' (highlighted with a red box and labeled 'c'). The main content area displays a table of 'Leave Policy' documents. The table has columns for 'Action', 'Document', 'Description', 'Version', and 'Uploaded Document'. A single document is listed: 'Sick Leave' with the description 'Sick Leave' and the uploaded document 'feedback_57df756fa76d7_1474262383.pdf'. The 'Action' column for this document has a 'View' icon (eye) highlighted with a red box and labeled 'd'. There are also 'Add multiple documents' and 'Add' buttons at the top right of the table.

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.

Your 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

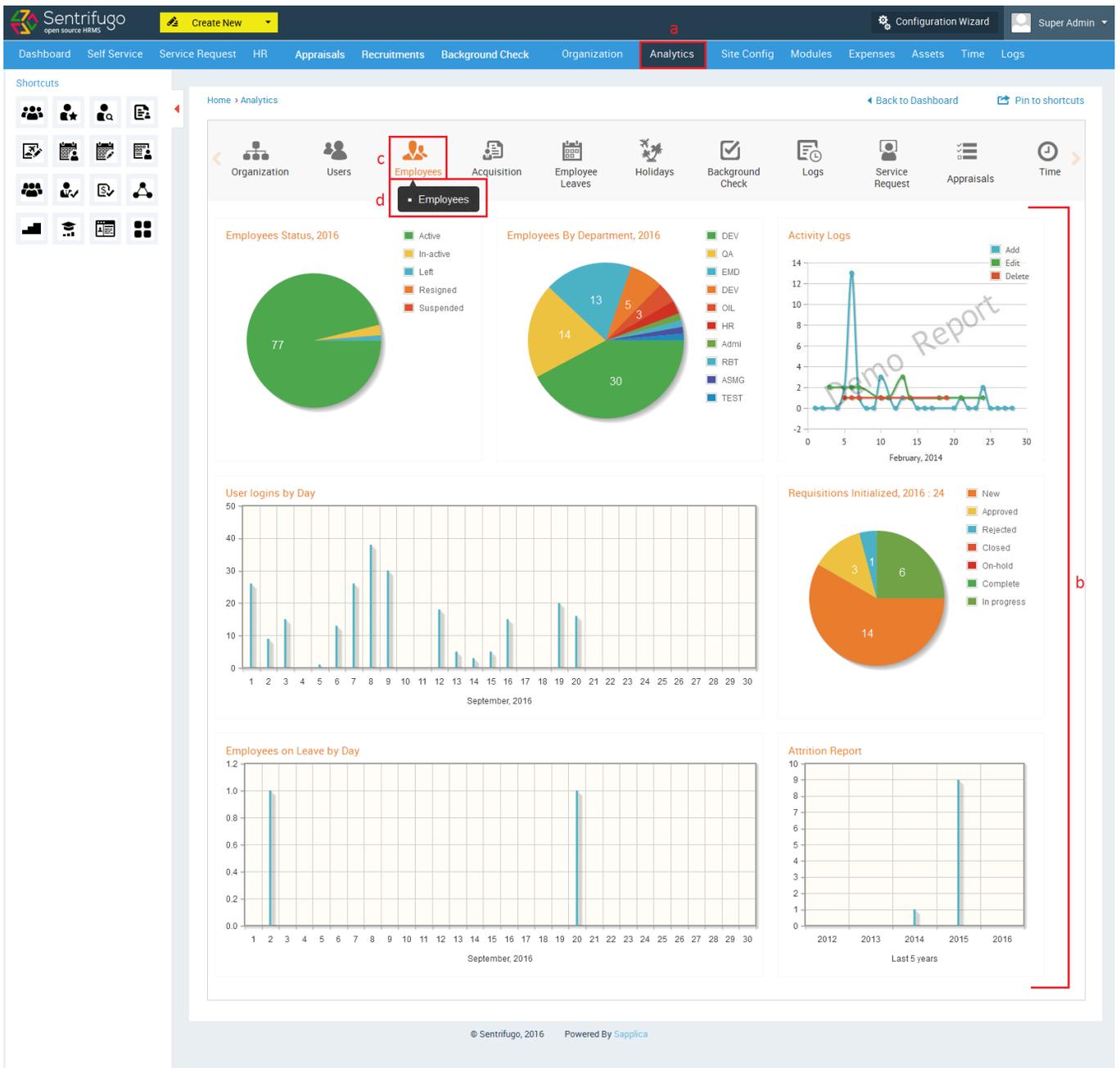
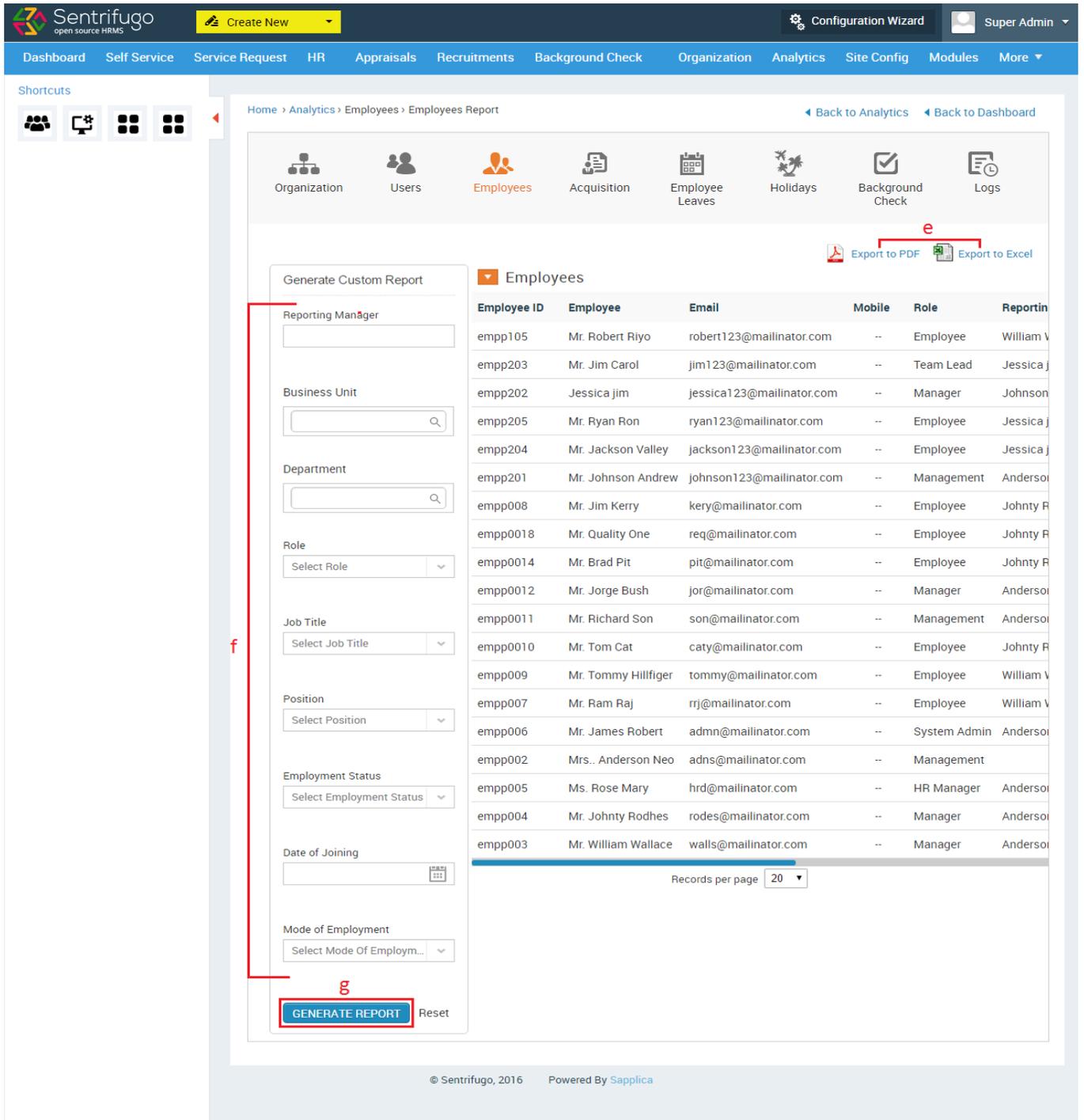


Figure 140

- 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

Employees

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

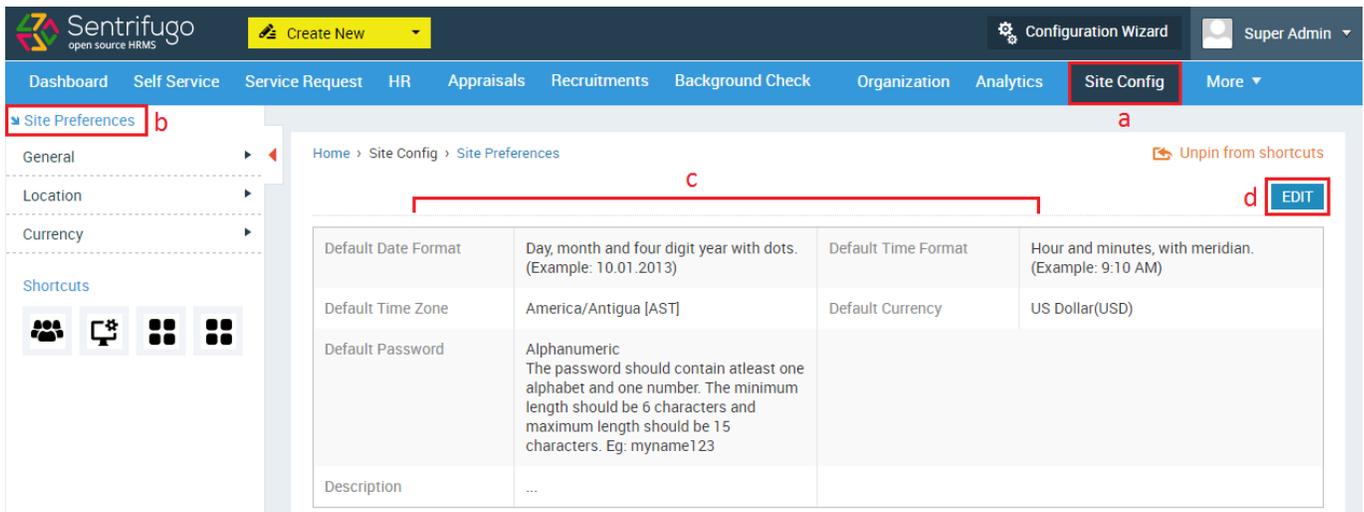
11. Site Config

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



Default Date Format	Day, month and four digit year with dots. (Example: 10.01.2013)	Default Time Format	Hour and minutes, with meridian. (Example: 9:10 AM)
Default Time Zone	America/Antigua [AST]	Default Currency	US Dollar(USD)
Default Password	Alphanumeric The password should contain atleast one alphabet and one number. The minimum length should be 6 characters and maximum length should be 15 characters. Eg: myname123		
Description	...		

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

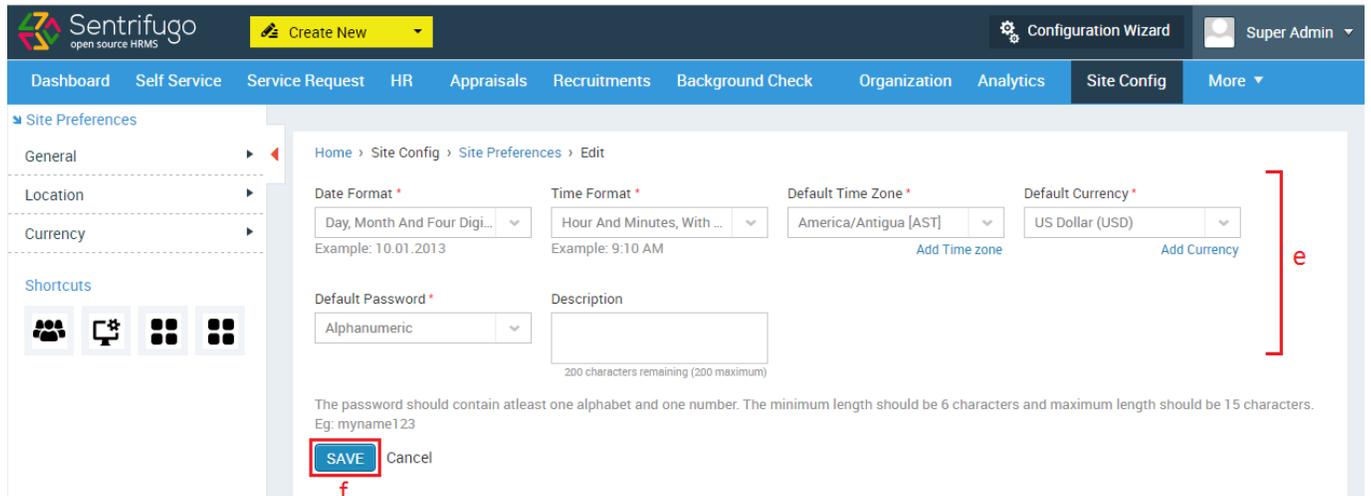


Figure 143

- 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

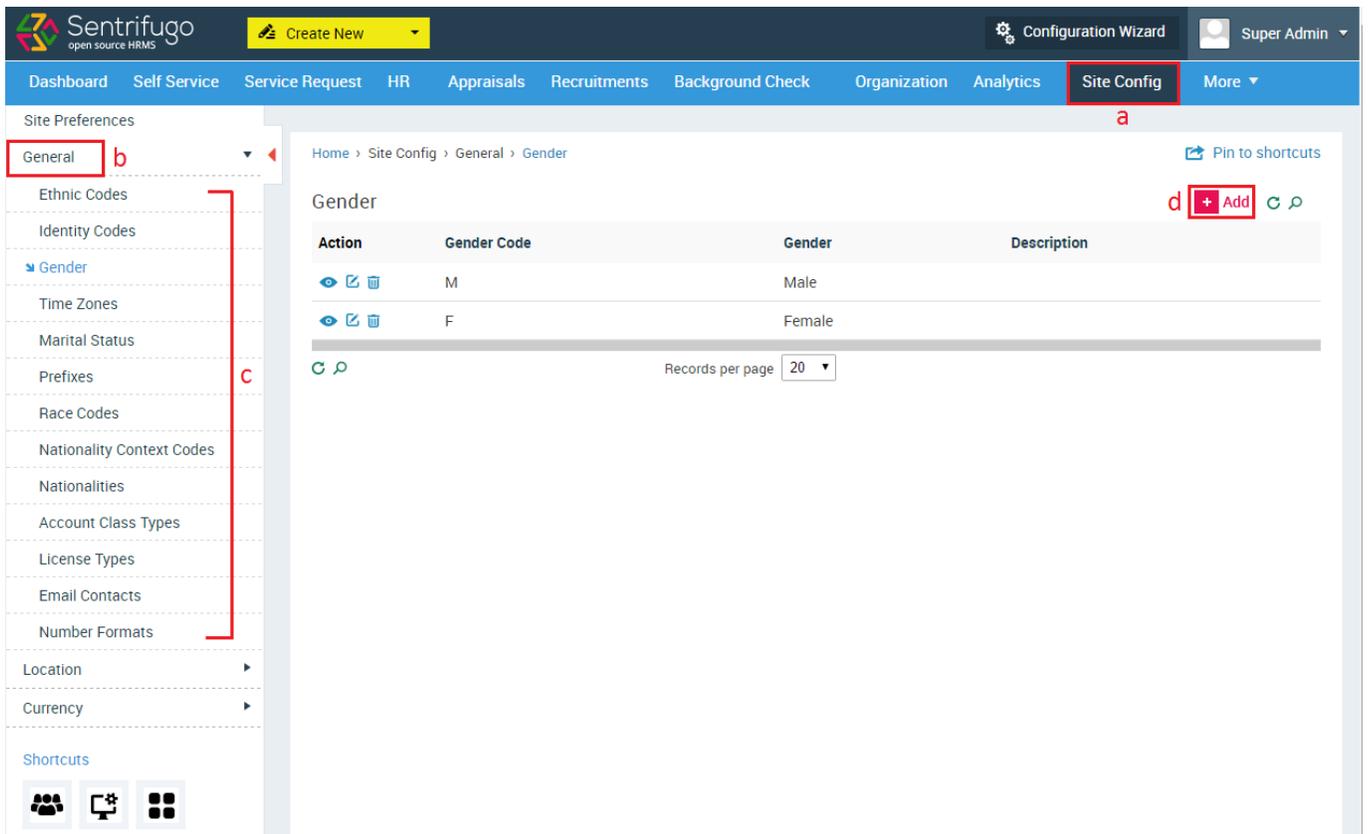


Figure 144

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

Please refer Figure 145

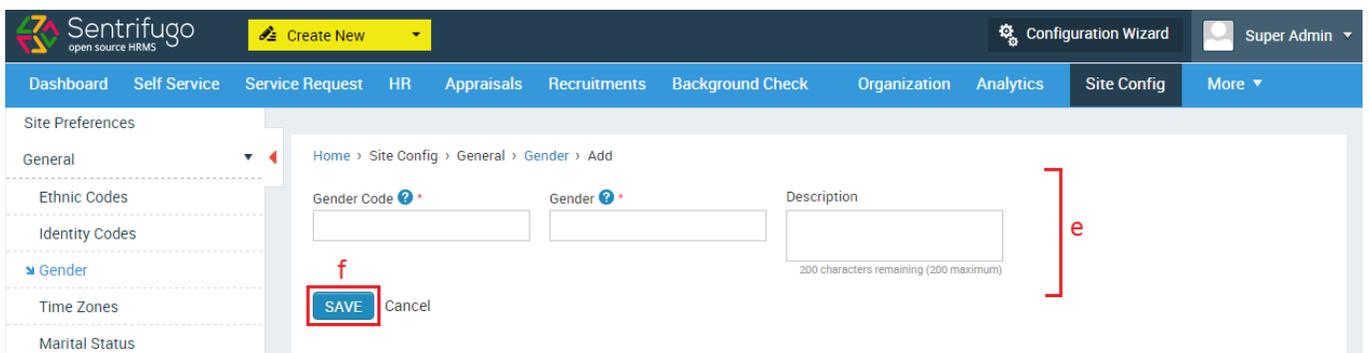


Figure 145

- Enter/Edit the details
- 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

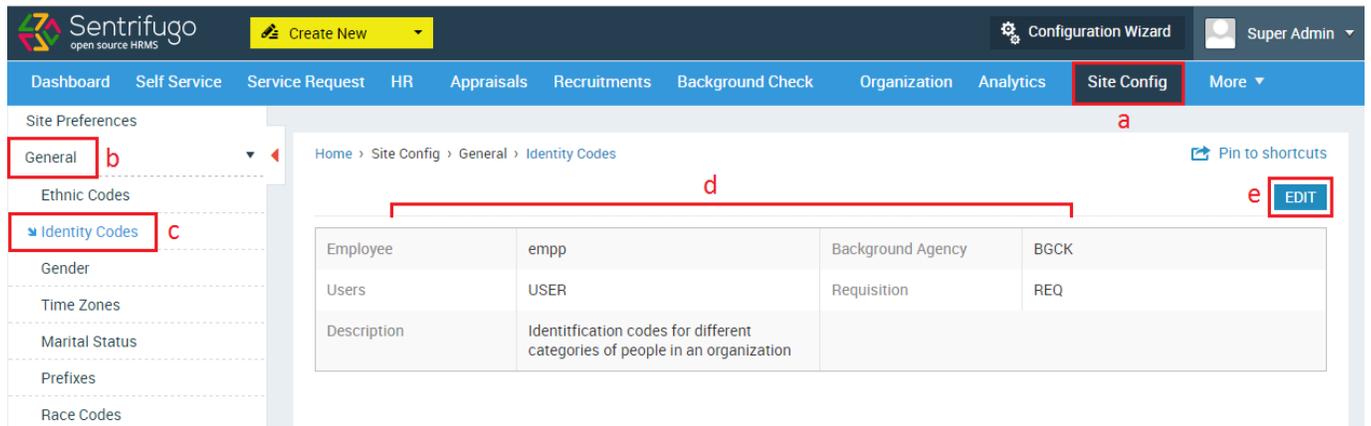


Figure 146

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

Please refer Figure 147

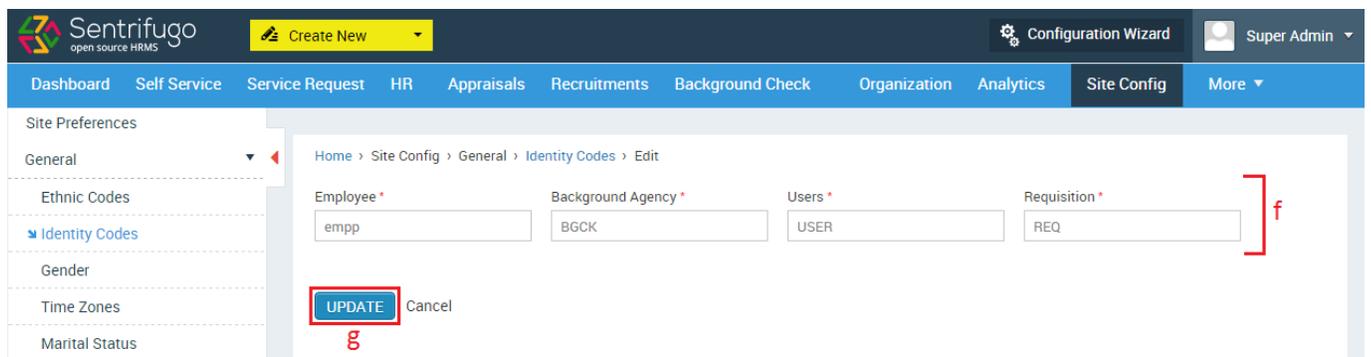


Figure 147

- f. Edit the details
- g. Click **SAVE** button

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

Please refer Figure 148

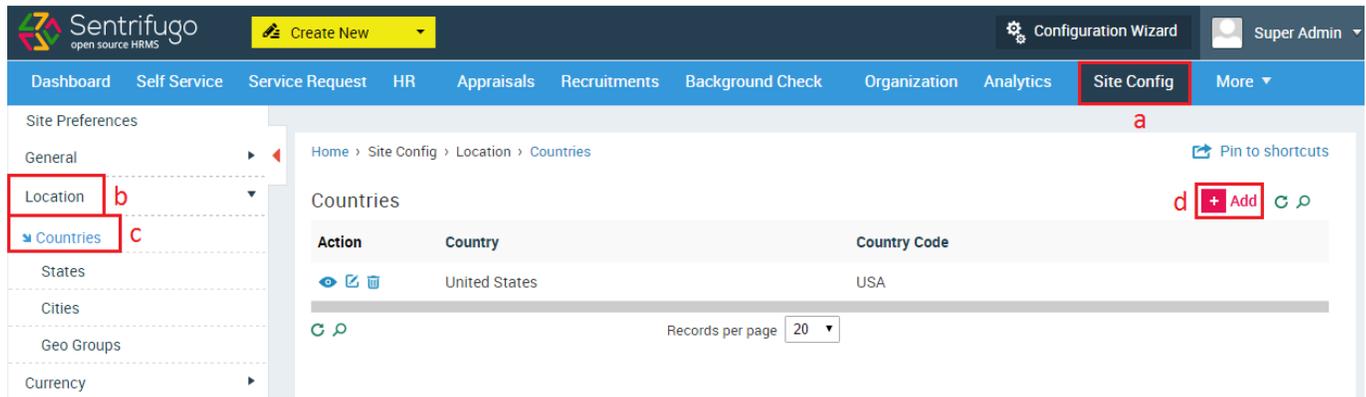


Figure 148

- 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

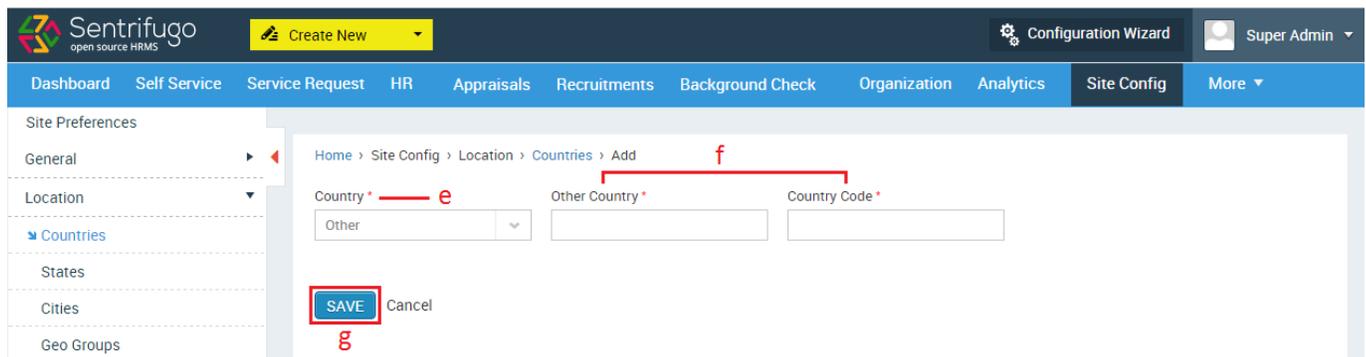


Figure 149

- 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

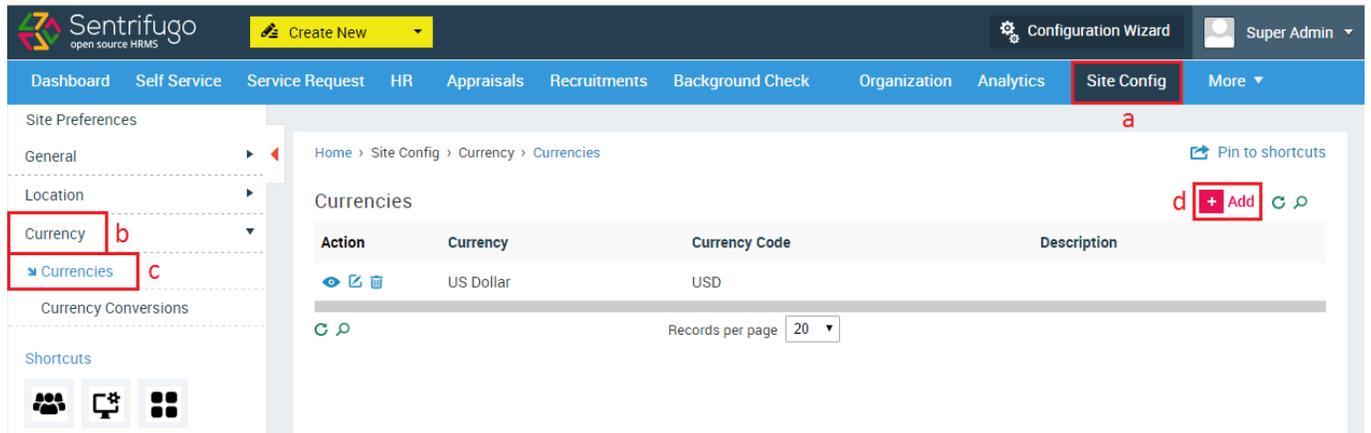


Figure 150

- 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

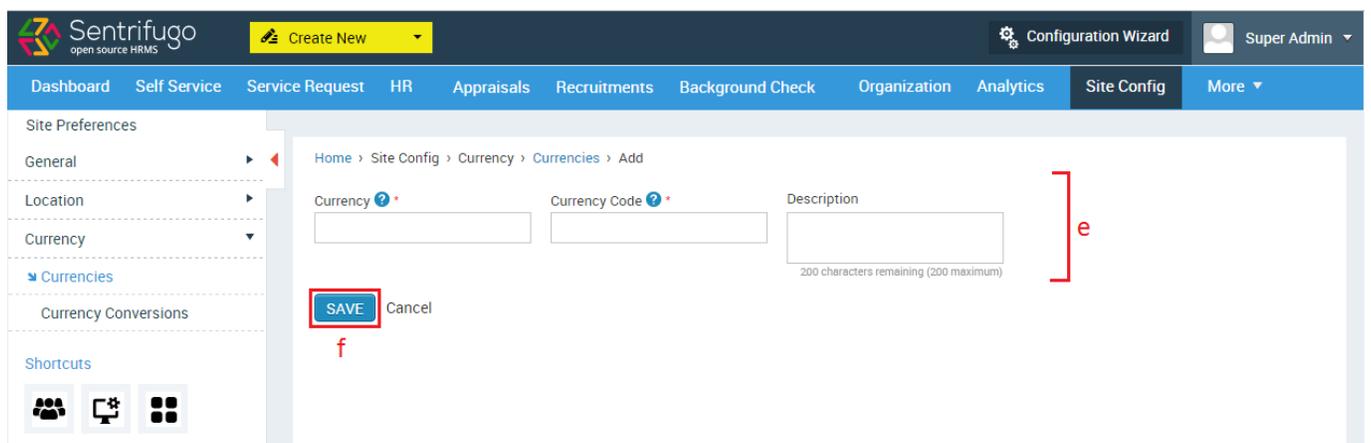


Figure 151

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

Currency Conversions

Please refer Figure 152

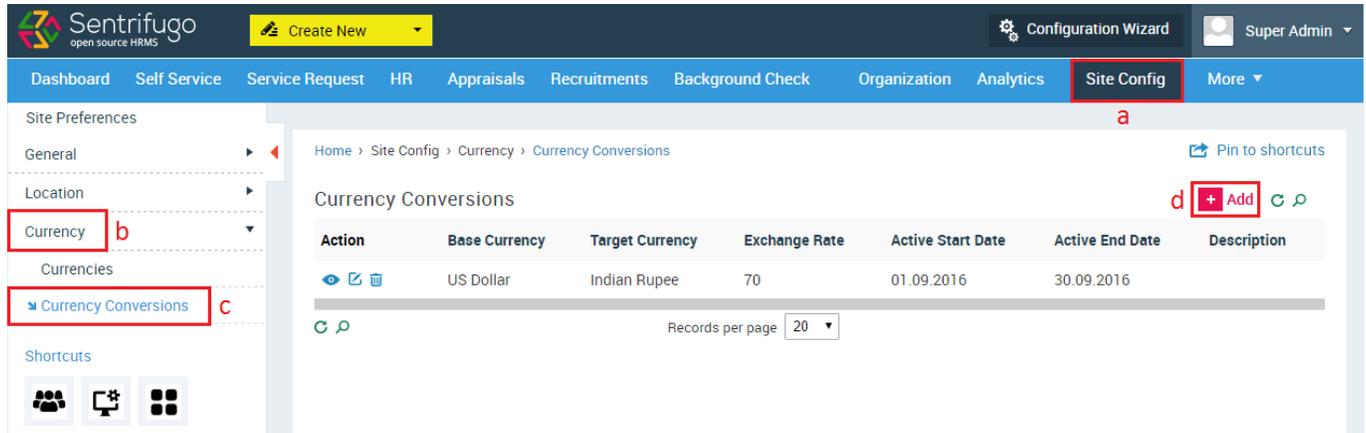


Figure 152

- a. Click **Site Config** menu option
- b. Click **Currency** on the left menu panel
- c. Click **Currency Conversions** in the submenu
- d. Click **+Add** button

Please refer Figure 153

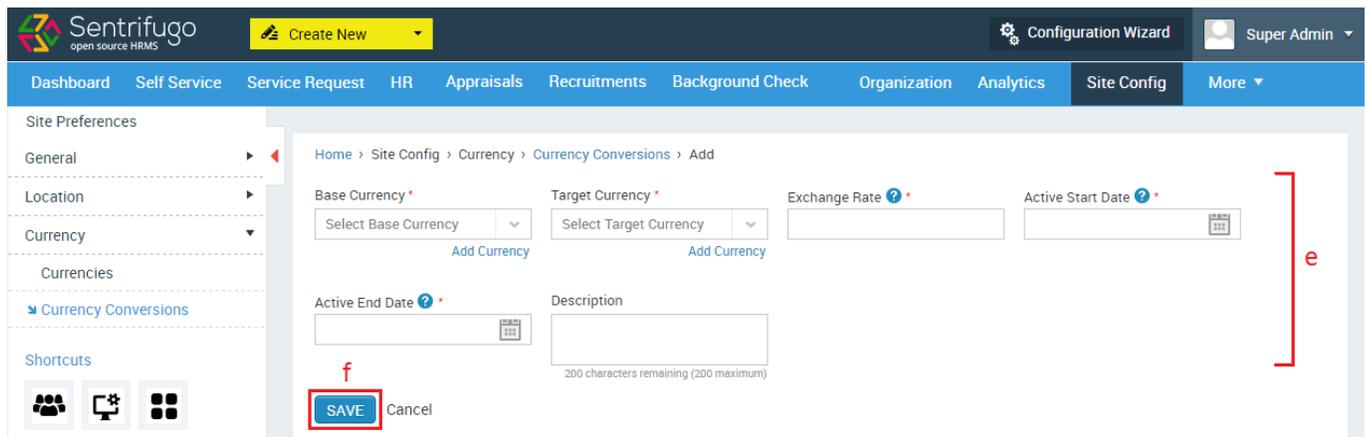


Figure 153

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

12. Modules

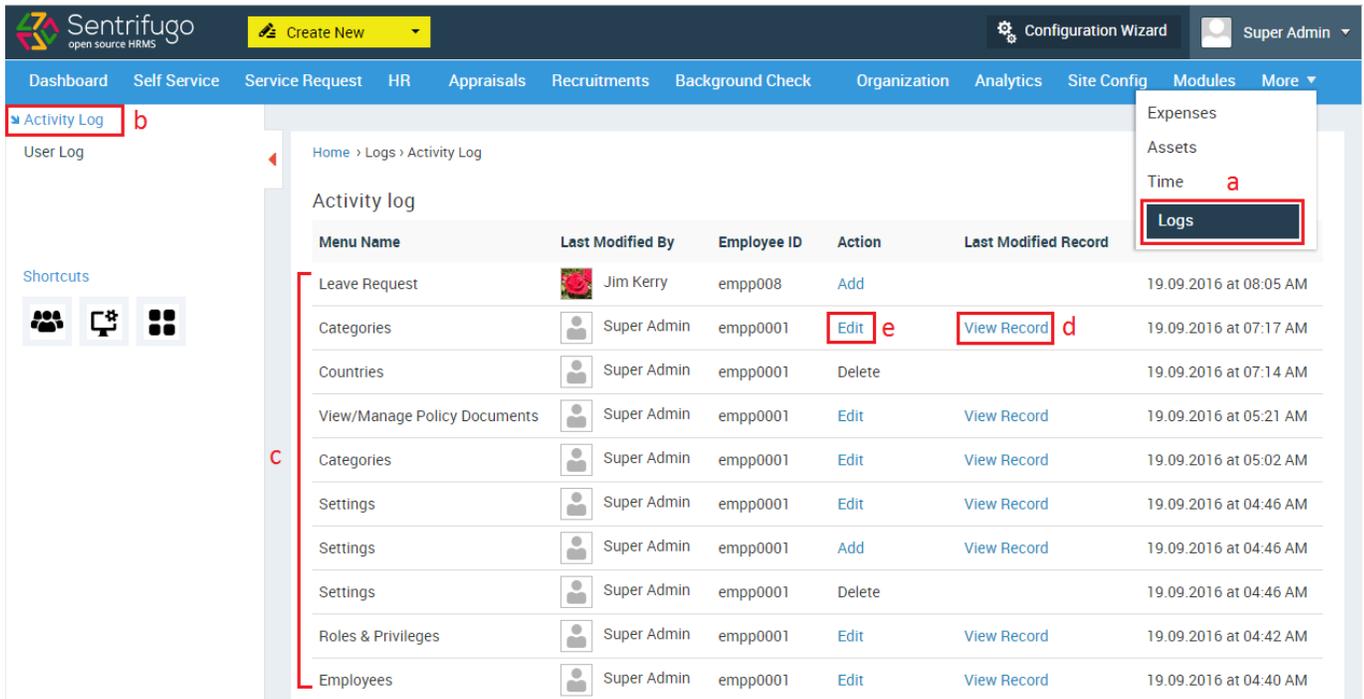
Please refer section [1.3.1 Configuration Wizard: Step 1](#)

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	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	19.09.2016 at 05:21 AM
Categories	Super Admin	empp0001	Edit	19.09.2016 at 05:02 AM
Settings	Super Admin	empp0001	Edit	19.09.2016 at 04:46 AM
Settings	Super Admin	empp0001	Add	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	19.09.2016 at 04:42 AM
Employees	Super Admin	empp0001	Edit	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	View Record

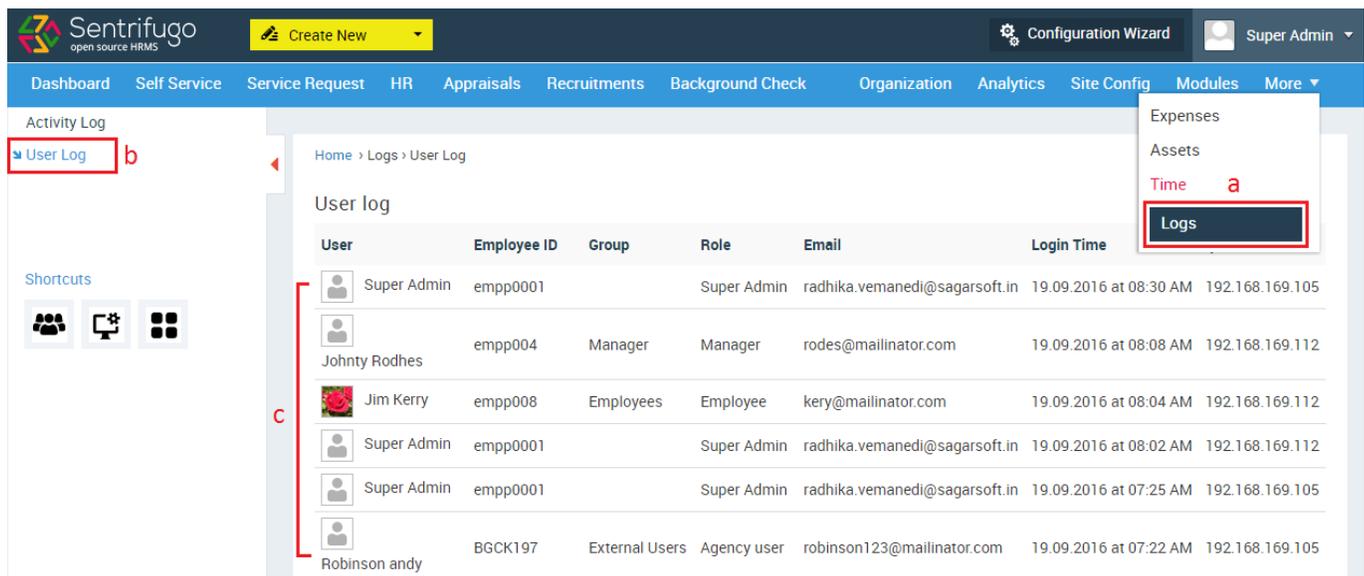
Records per page

CLOSE

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

13.2 How do I view User Logs?

Please refer Figure 155



Home > Logs > User Log

User log

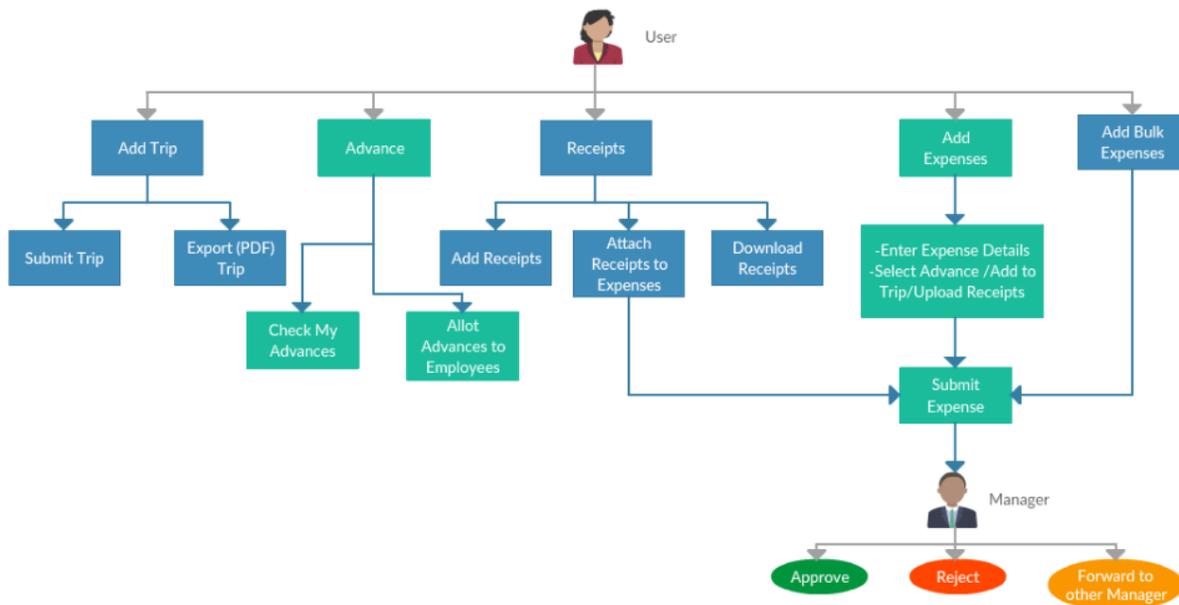
User	Employee ID	Group	Role	Email	Login Time
Super Admin	empp0001		Super Admin	radhika.vemanedi@sagarsoft.in	19.09.2016 at 08:30 AM 192.168.169.105
Johny Rodhes	empp004	Manager	Manager	rodes@mailinator.com	19.09.2016 at 08:08 AM 192.168.169.112
Jim Kerry	empp008	Employees	Employee	kery@mailinator.com	19.09.2016 at 08:04 AM 192.168.169.112
Super Admin	empp0001		Super Admin	radhika.vemanedi@sagarsoft.in	19.09.2016 at 08:02 AM 192.168.169.112
Super Admin	empp0001		Super Admin	radhika.vemanedi@sagarsoft.in	19.09.2016 at 07:25 AM 192.168.169.105
Robinson andy	BGCK197	External Users	Agency user	robinson123@mailinator.com	19.09.2016 at 07:22 AM 192.168.169.105

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

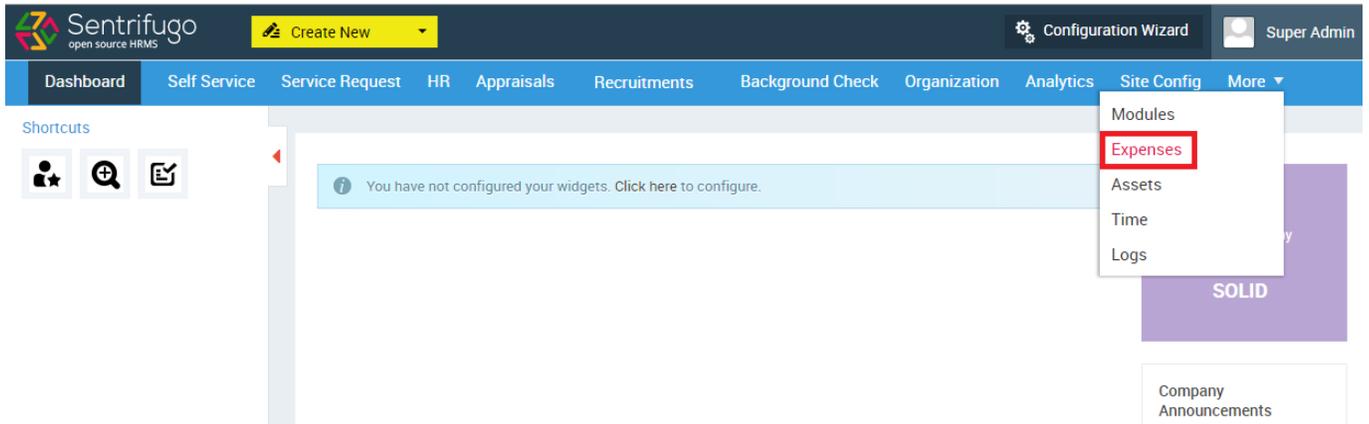


Figure 156

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

Please refer Figure 157

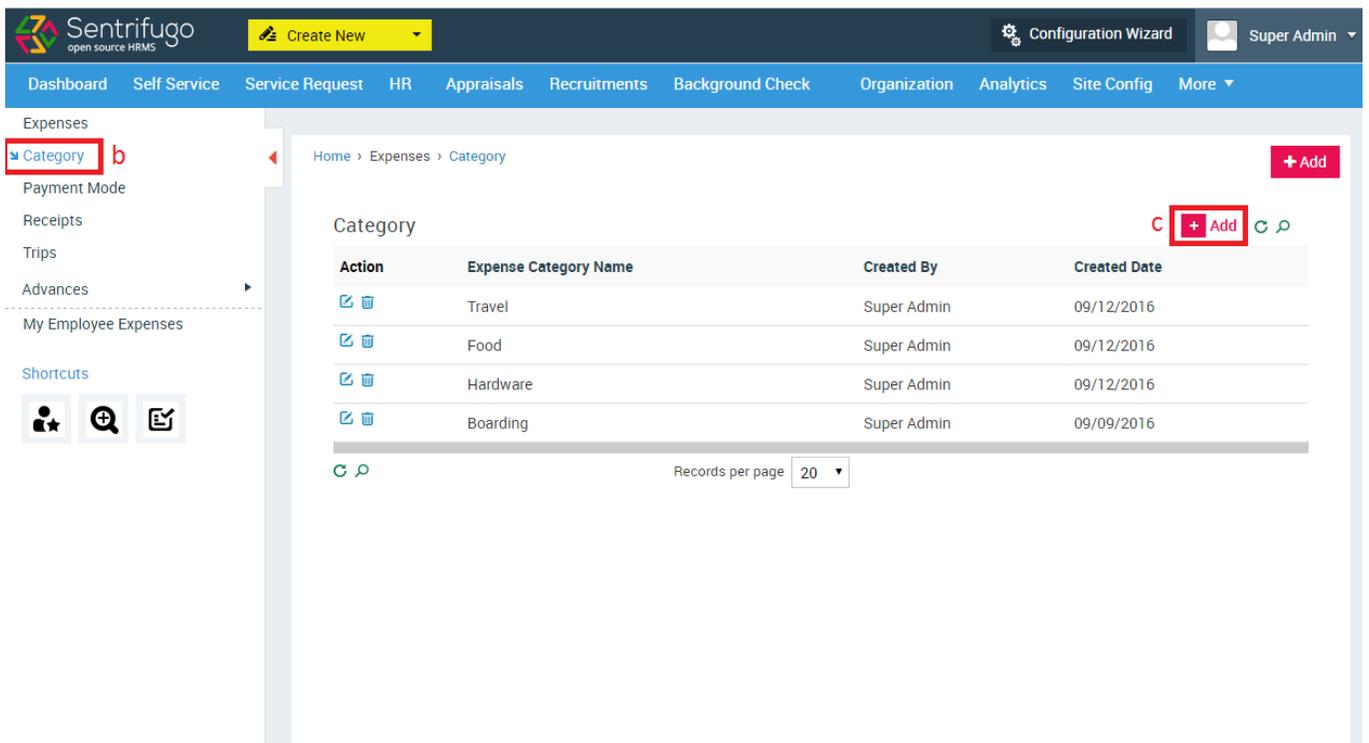


Figure 157

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

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

Or

Please refer Figure 158

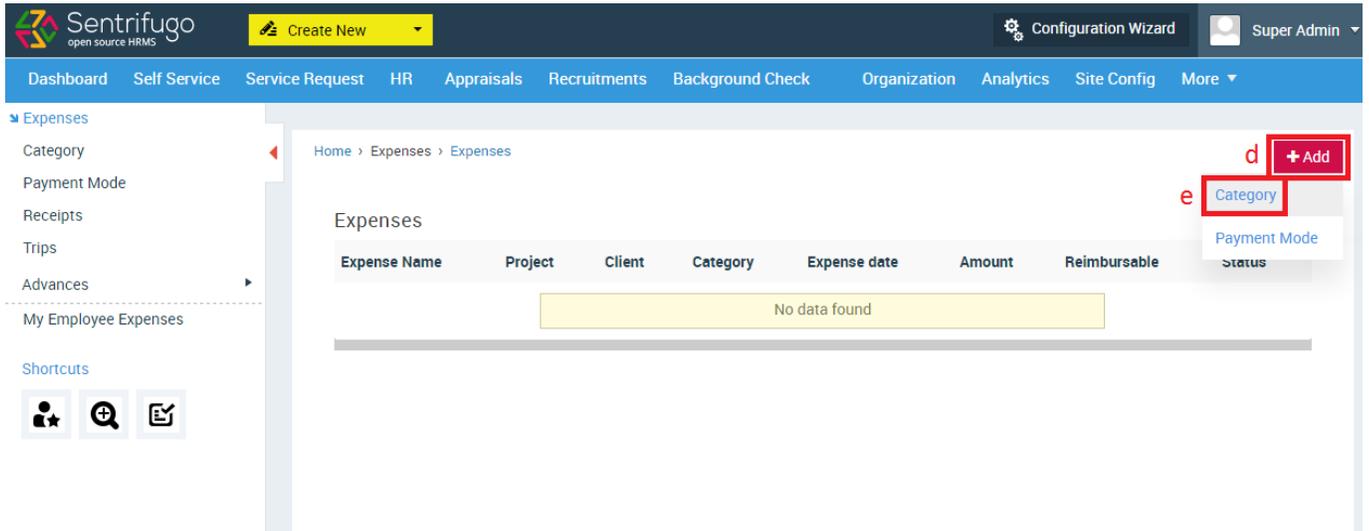


Figure 158

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

e. Select **Category**

Please refer Figure 159

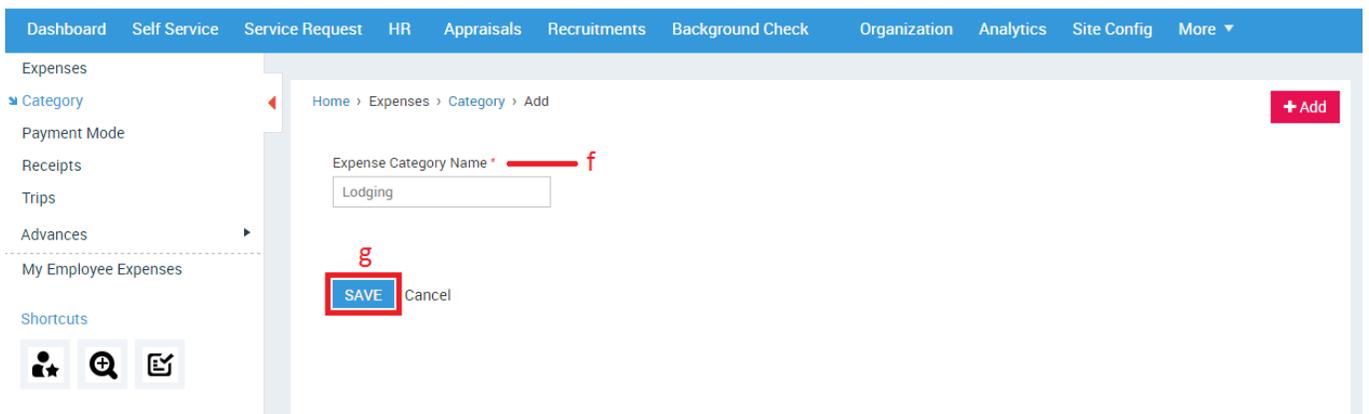


Figure 159

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

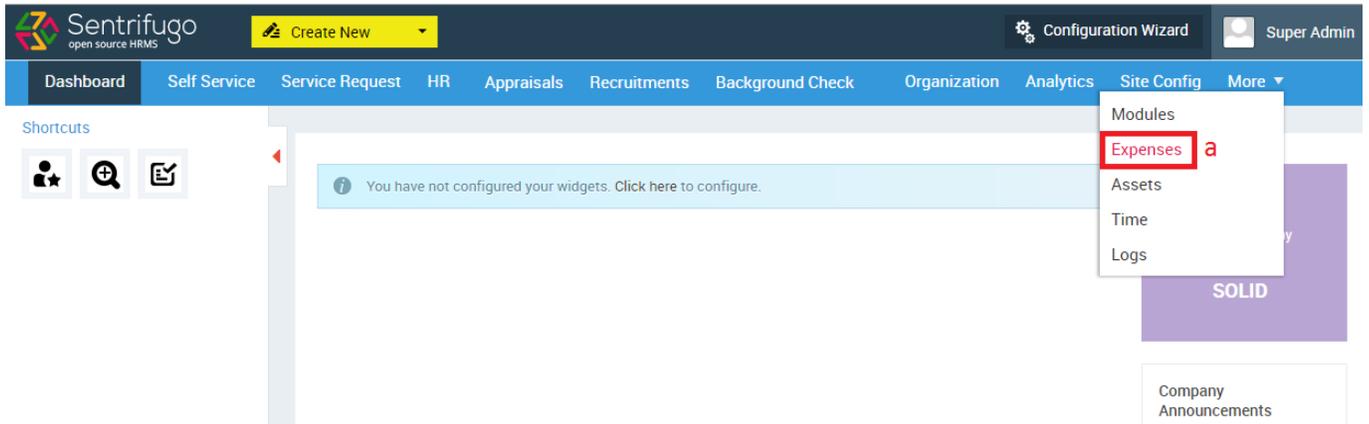


Figure 160

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

Please refer Figure 161

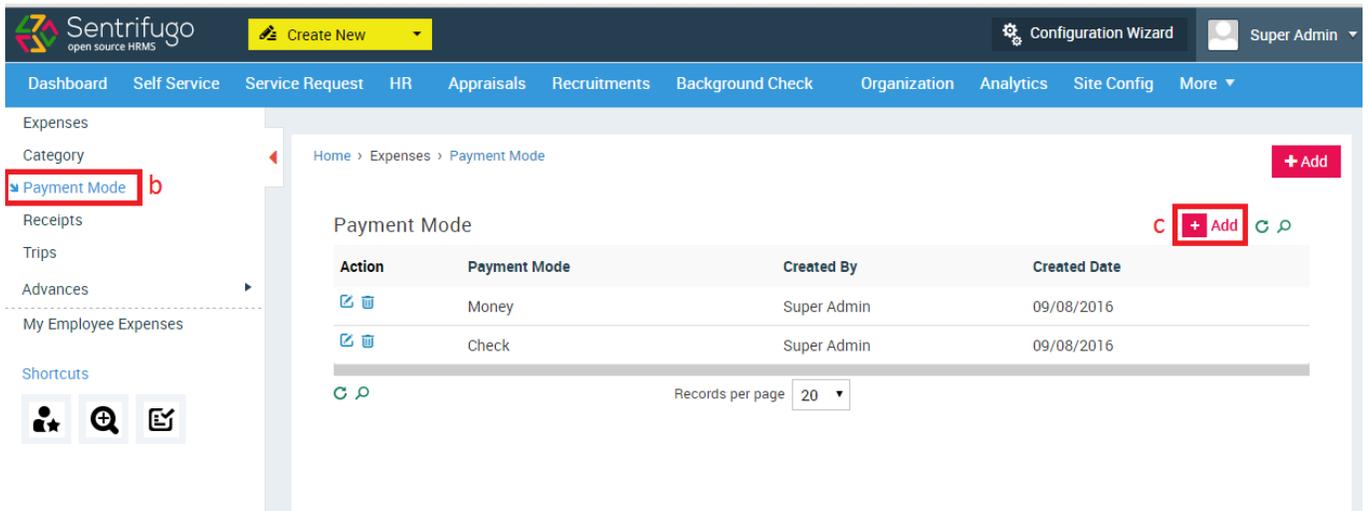


Figure 161

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

Or

Please refer Figure 162

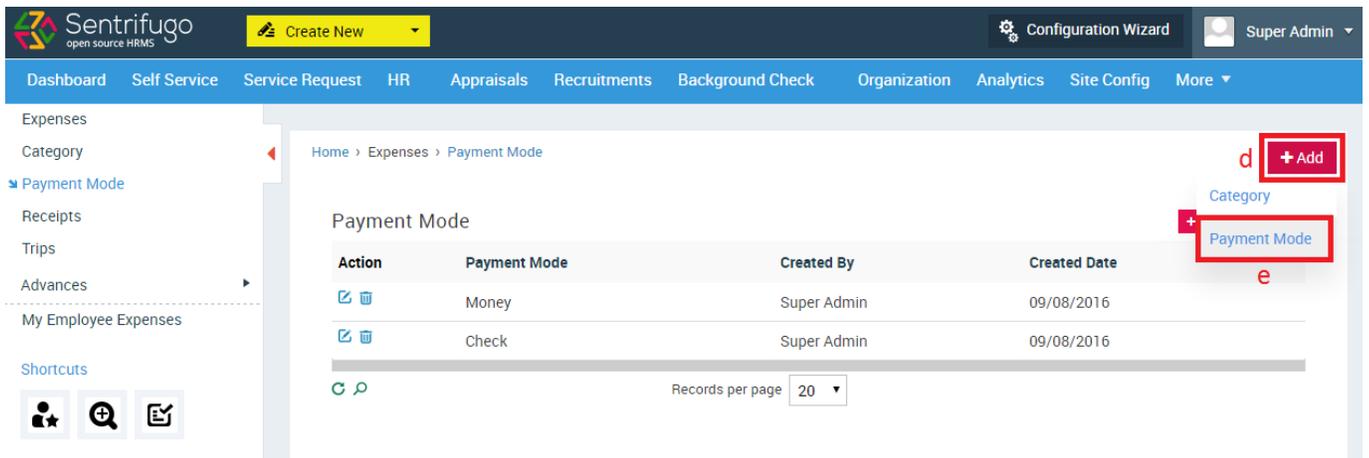


Figure 162

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

Please refer Figure 163

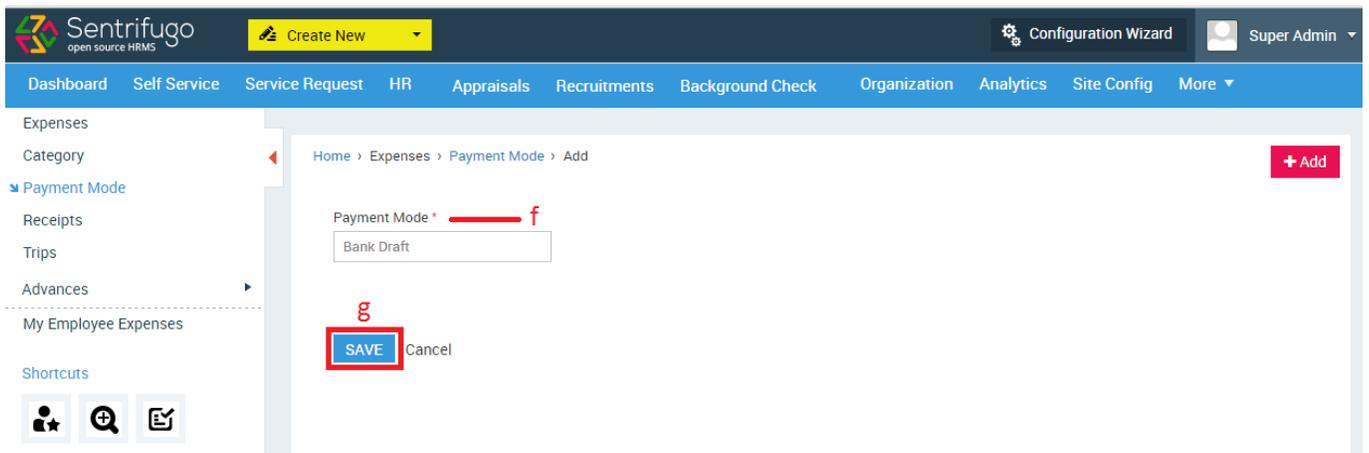


Figure 163

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

14.3 How do I add an Expense?

Please refer Figure 164

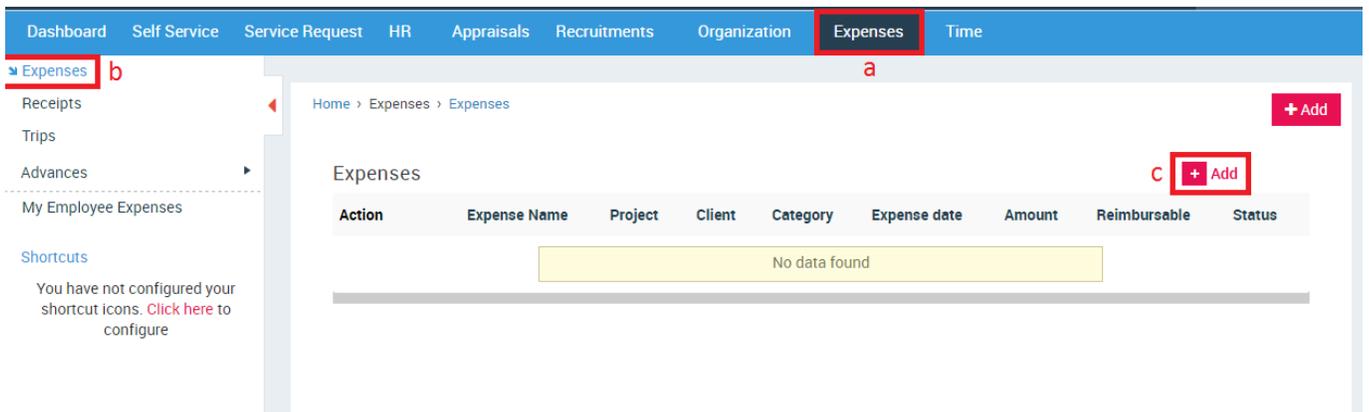


Figure 164

- 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

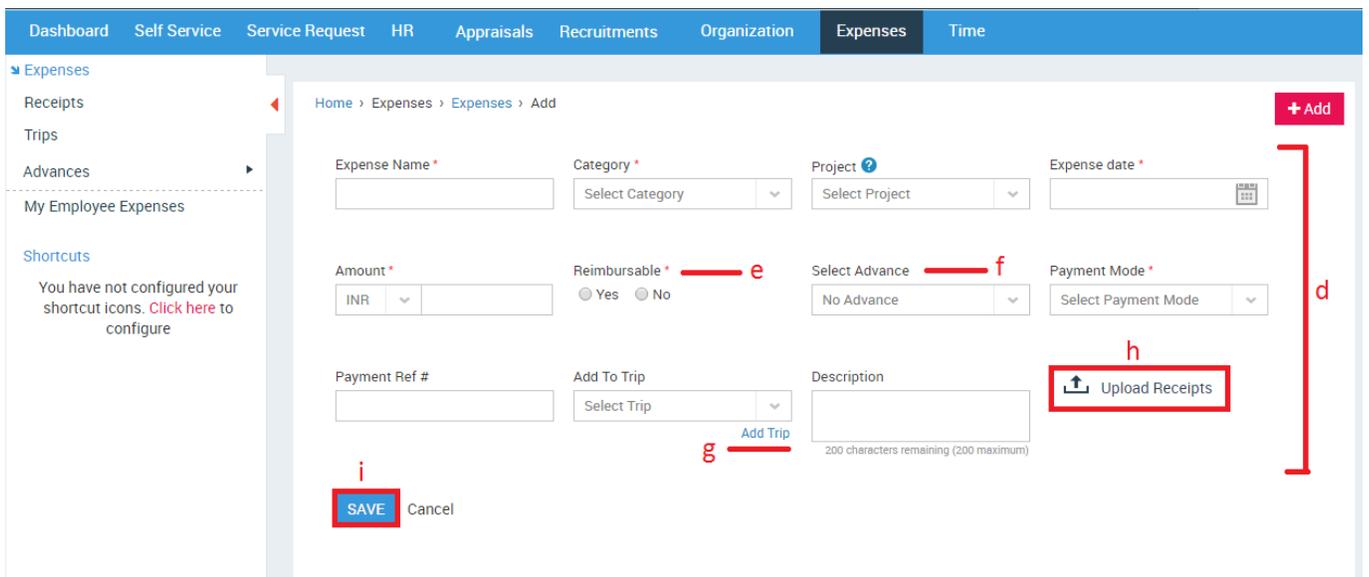


Figure 165

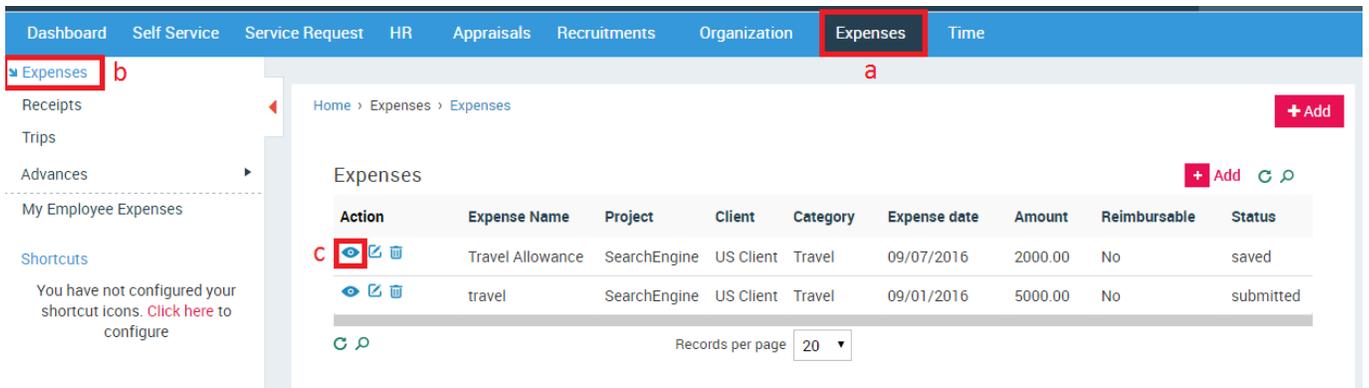
- d. Enter the required details
- e. Not functional in the current version
- f. Employers can pre-allocate a certain amount of money called **Advance** to an employee, which can be used for expenses incurred during trip(s) or for project(s) and client(s).
- g. Add Trips for managing multiple expenses, 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



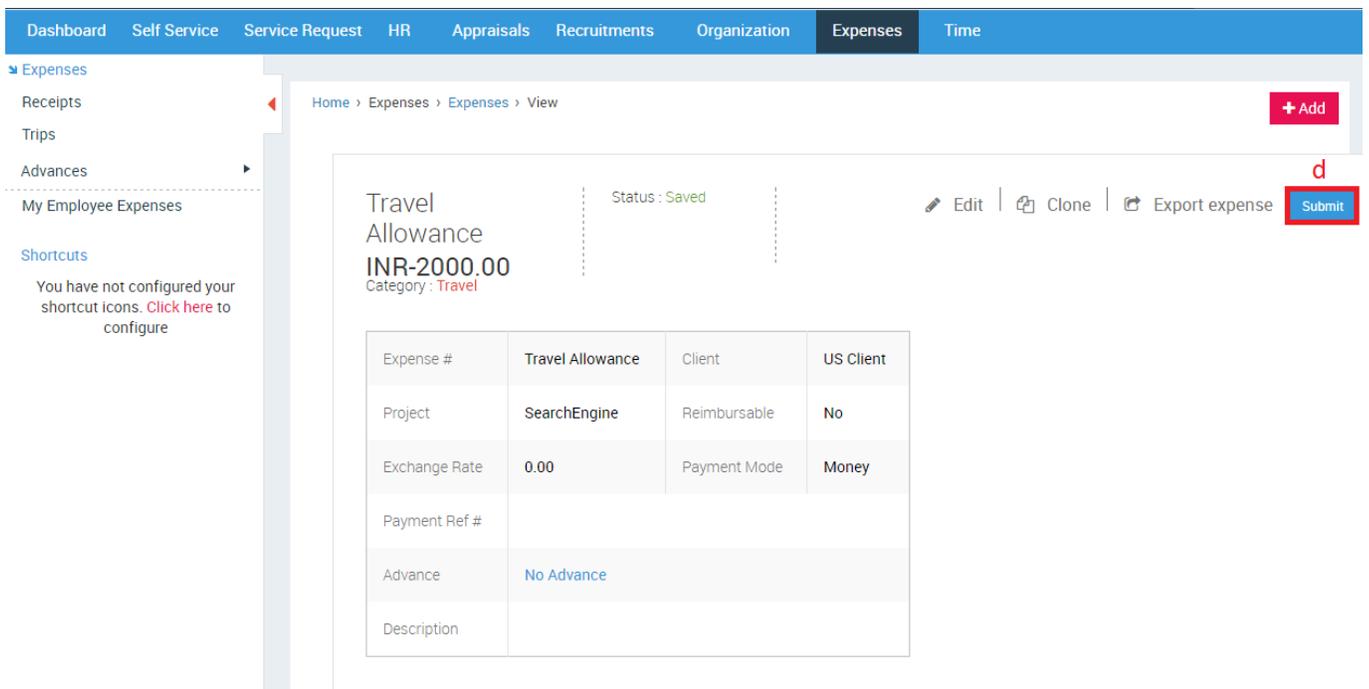
The screenshot shows the Sentrifugo interface with the 'Expenses' menu item highlighted in the top navigation bar (a) and the left sidebar (b). The main content area displays a table of expenses. The first row of the table has the 'View' button in the 'Action' column highlighted (c).

Action	Expense Name	Project	Client	Category	Expense date	Amount	Reimbursable	Status
View	Travel Allowance	SearchEngine	US Client	Travel	09/07/2016	2000.00	No	saved
View	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 interface with the 'Expenses' menu item highlighted in the top navigation bar. The main content area displays the details of a 'Travel Allowance' expense. The 'Submit' button is highlighted (d).

Travel Allowance
 Status: Saved
 INR-2000.00
 Category: Travel

[Edit](#) | [Clone](#) | [Export expense](#) | [Submit](#)

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

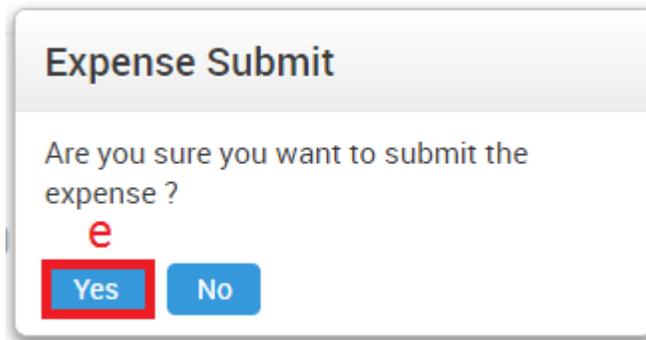


Figure 168

- 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

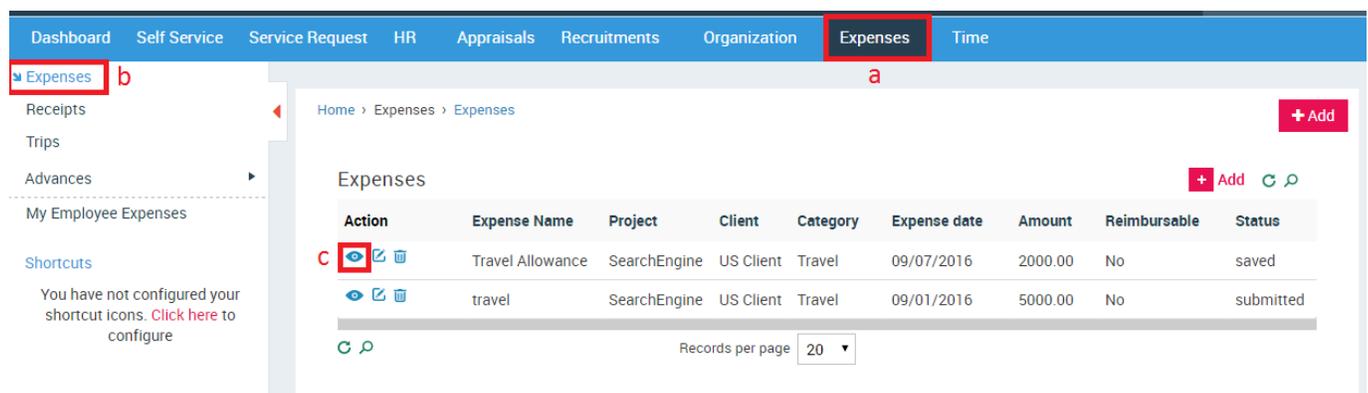


Figure 169

- 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

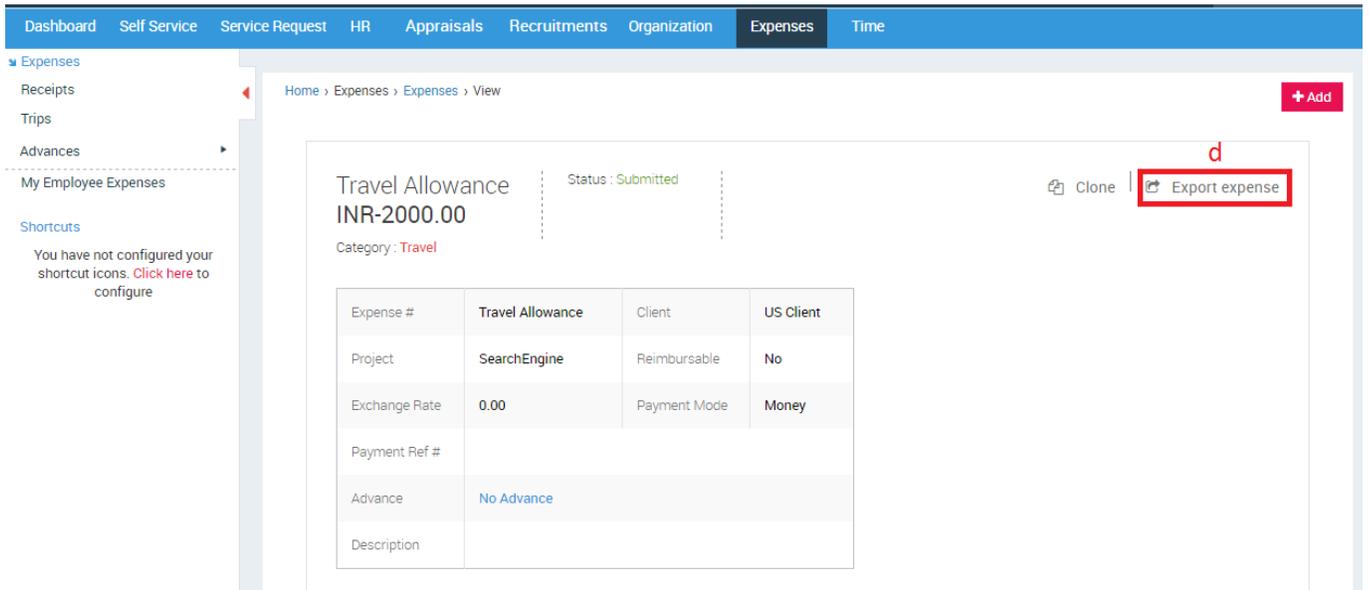


Figure 170

- 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

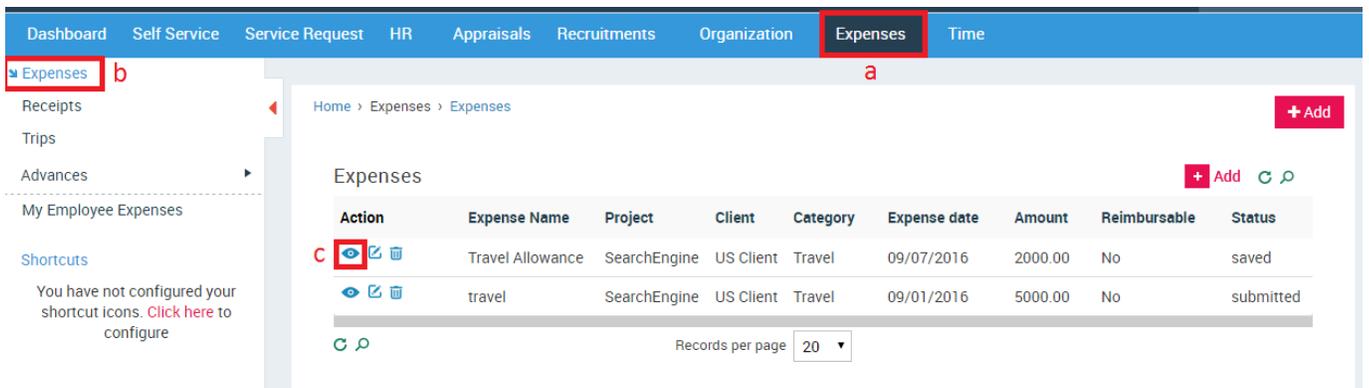
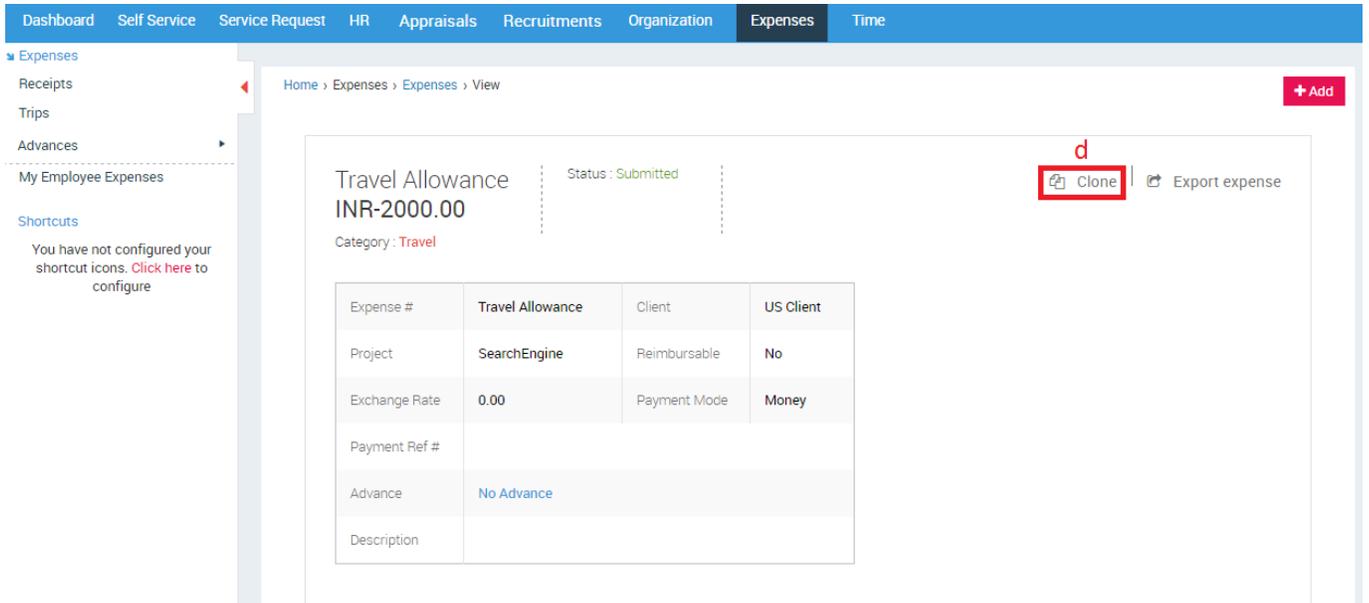


Figure 171

- 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



Home > Expenses > Expenses > View

Travel Allowance
 INR-2000.00
 Status: Submitted
 Category: Travel

Clone | Export 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 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

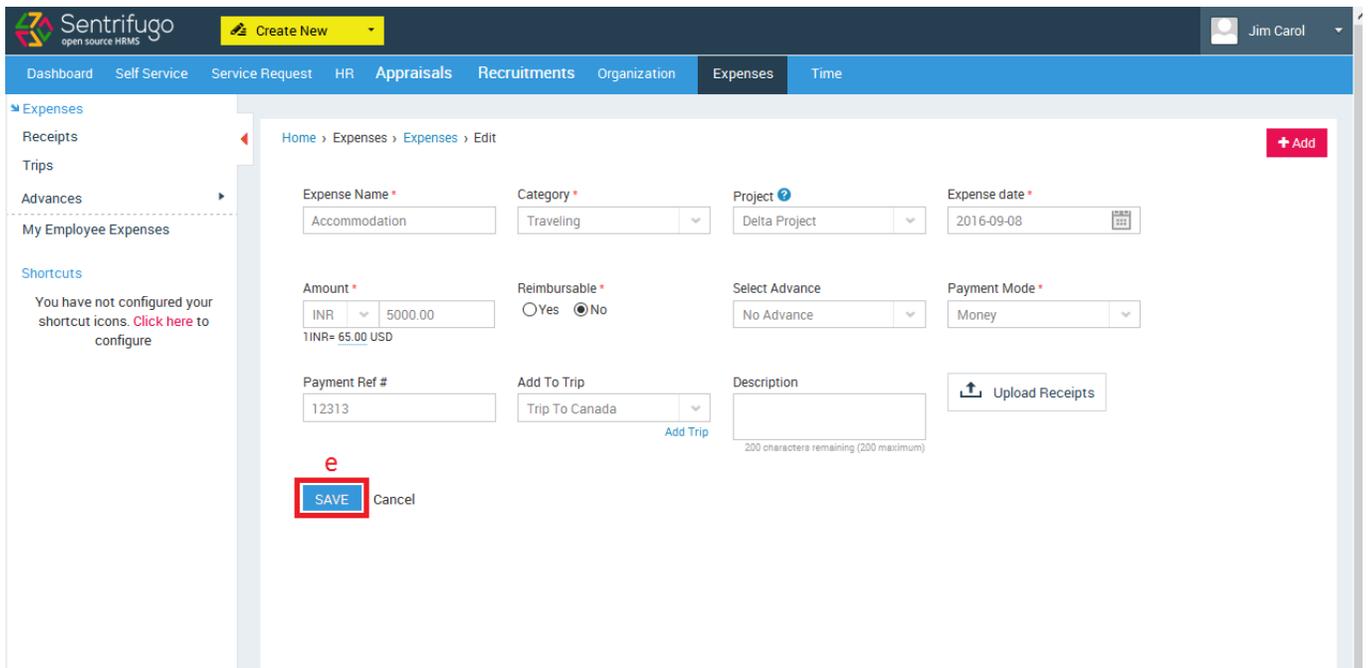


Figure 173

- e. Click **SAVE** button

14.7 How do I approve/reject Employee Expenses?

Please refer Figure 174

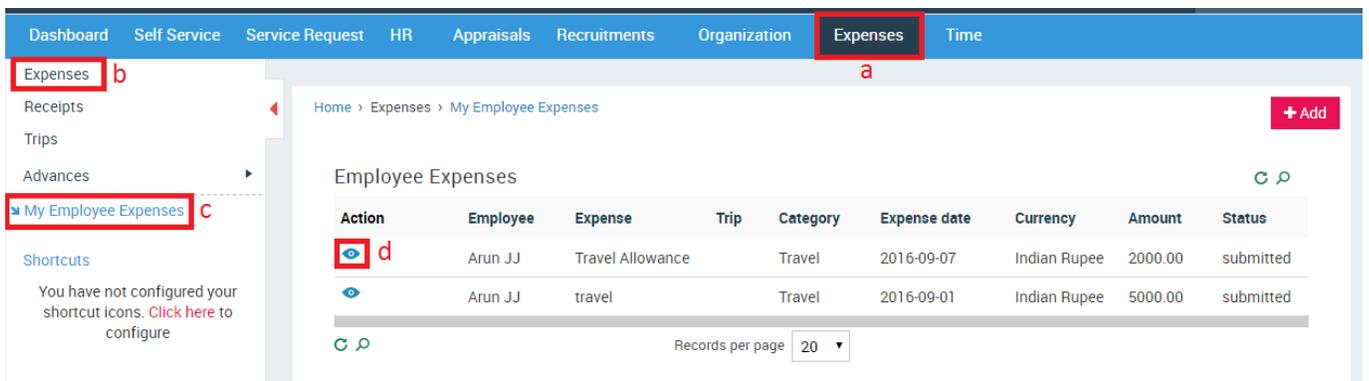


Figure 174

- 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

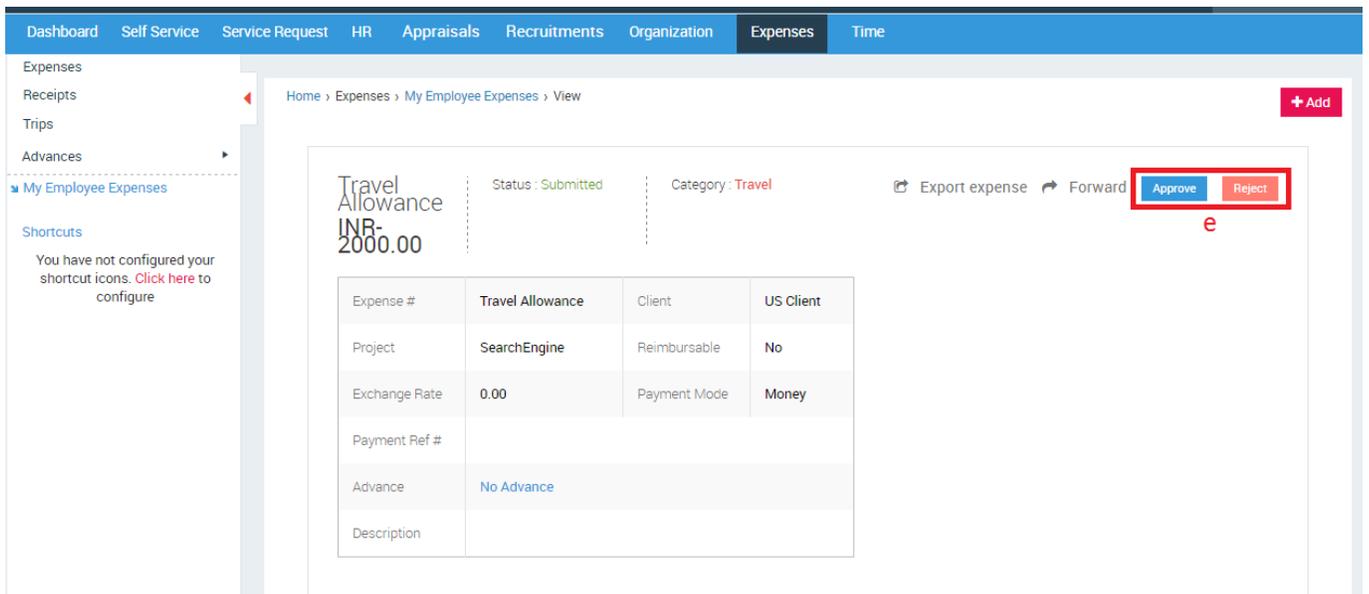


Figure 175

e. Click **Approve/Reject**

A confirmation message will be displayed.

Please refer Figure 176

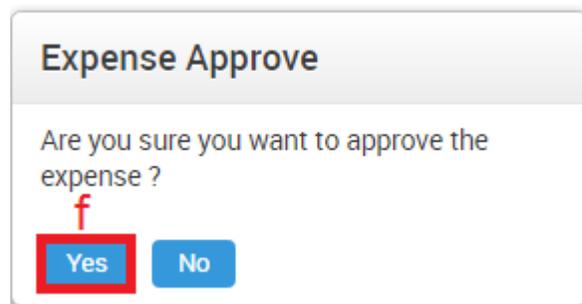


Figure 176

f. Click **Yes** Button

14.8 How do I forward an Expense to another Manager?

Please refer Figure 177

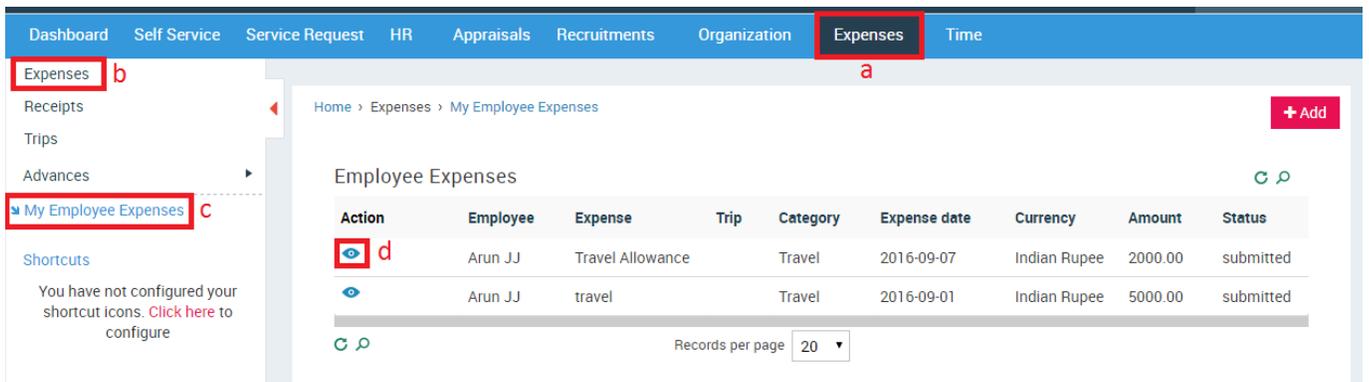


Figure 177

- 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

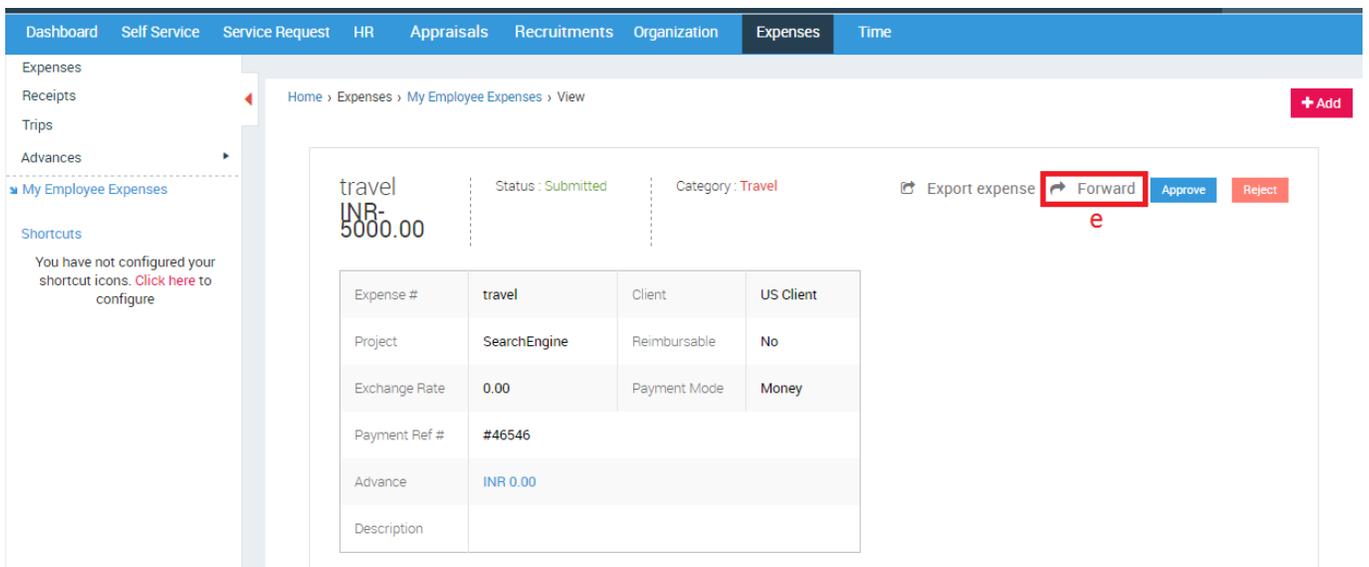


Figure 178

- e. Click **Forward** option

A small pop up window will open

Please refer Figure 178

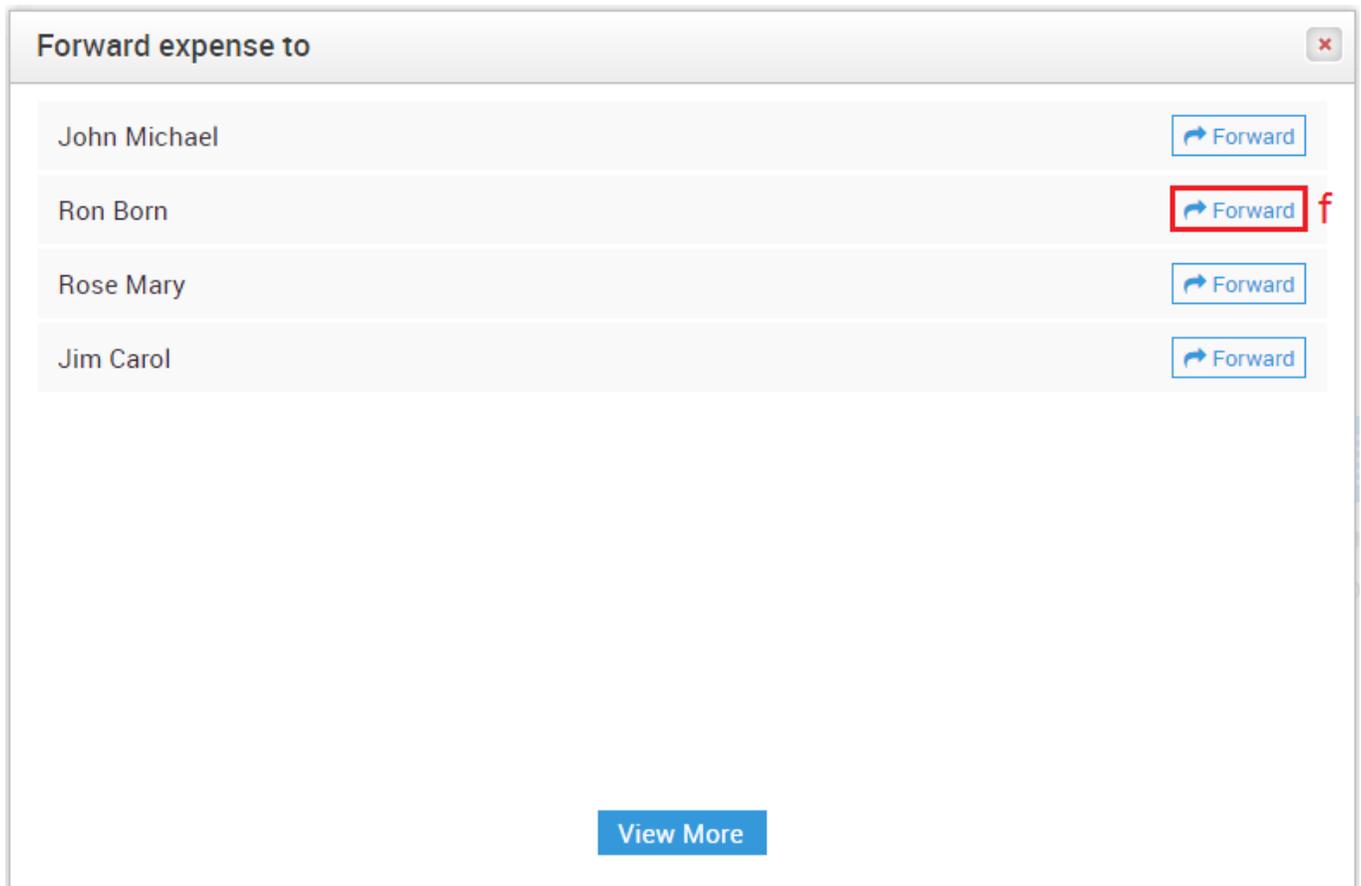


Figure 178

- 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

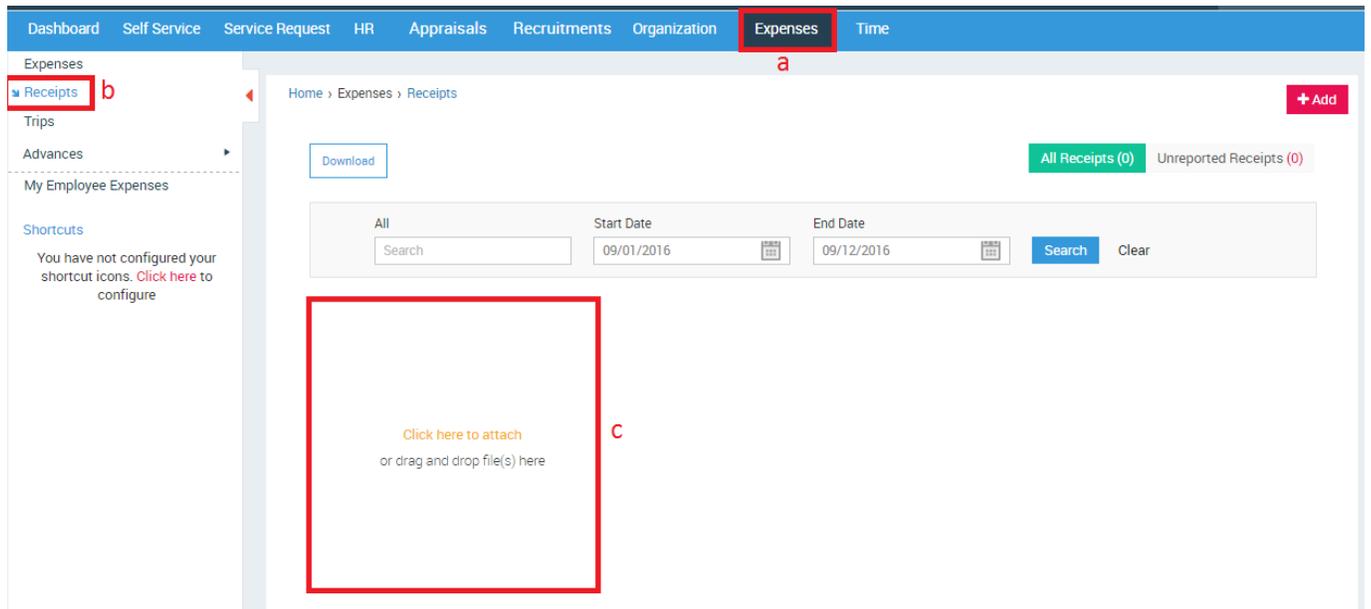


Figure 179

- 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

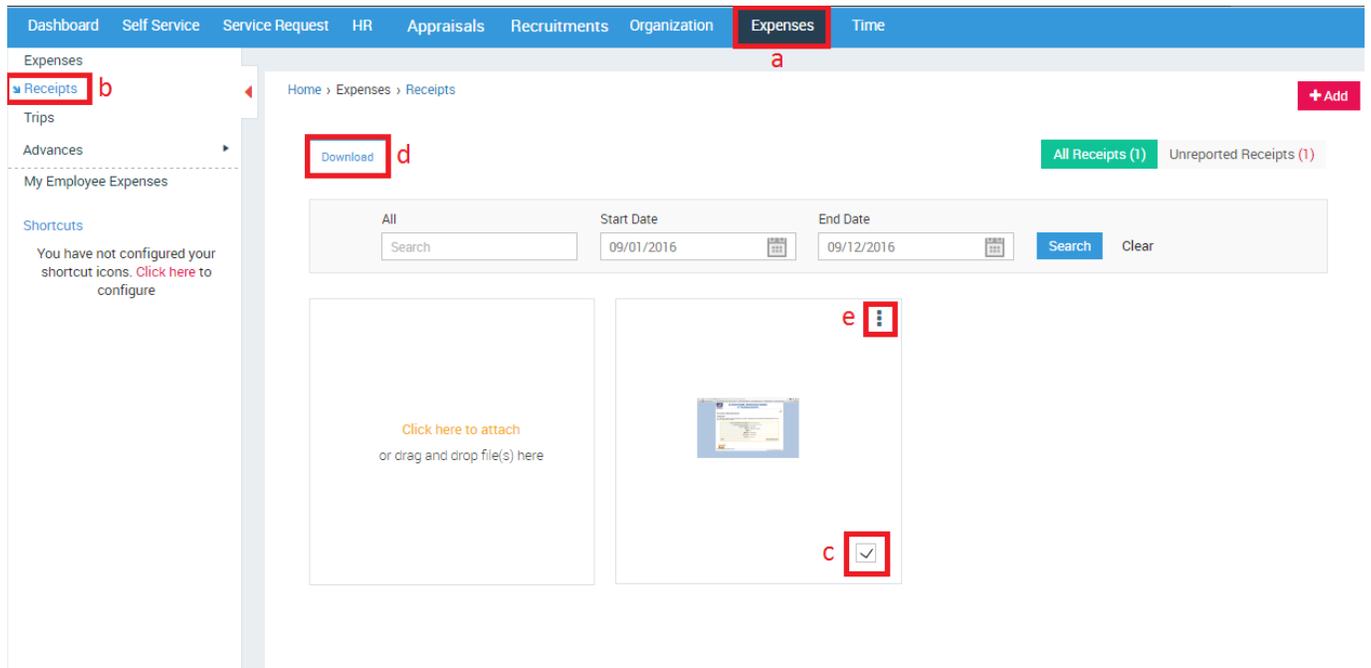


Figure 180

- 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

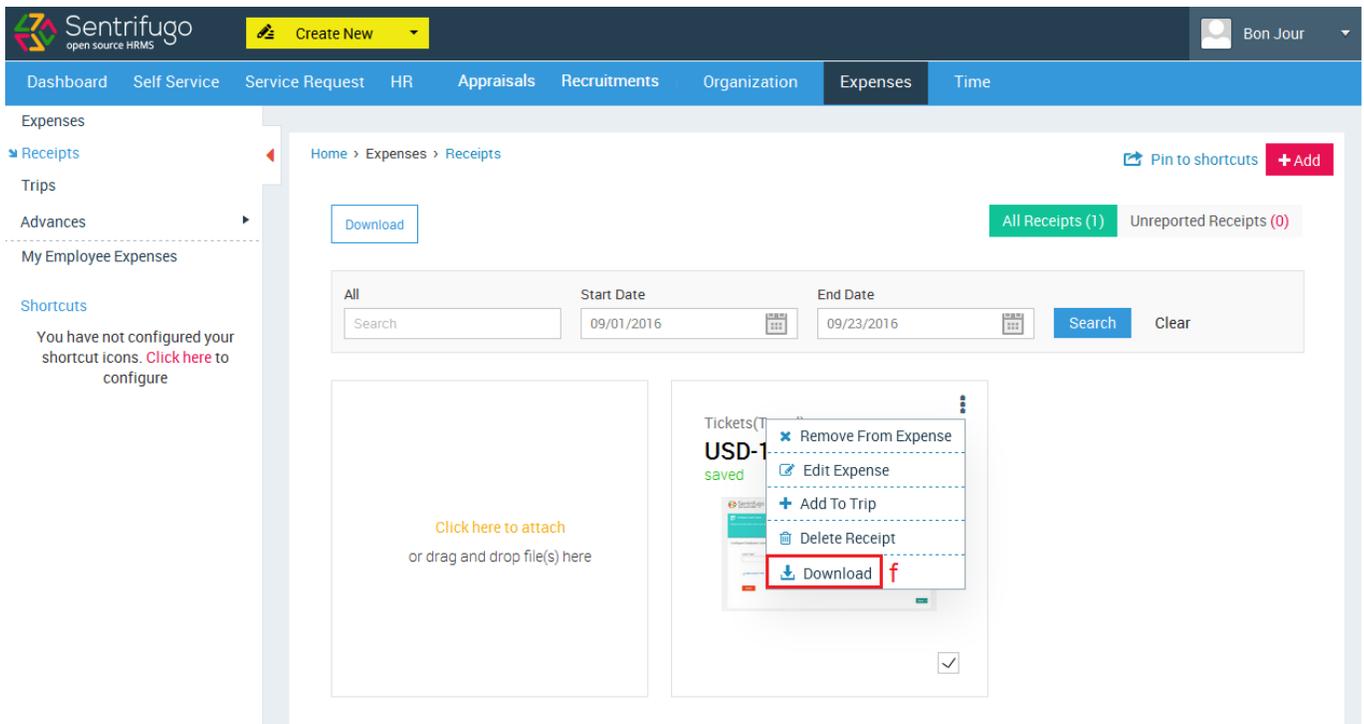


Figure 181

- 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

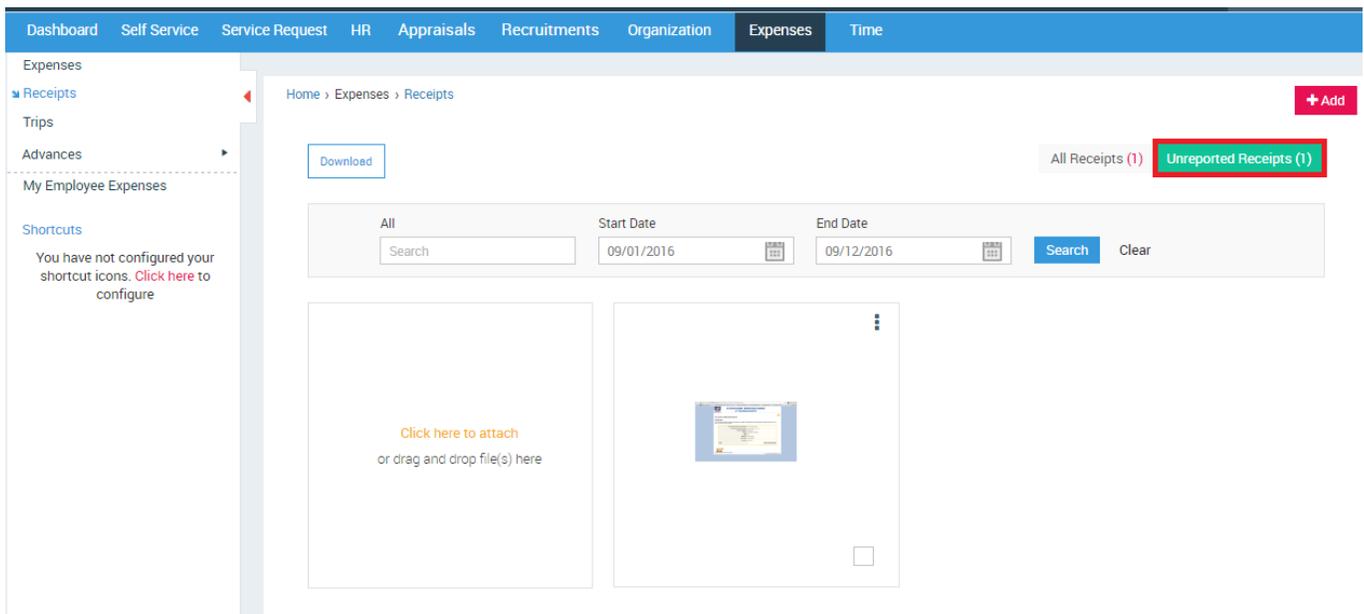


Figure 182

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*

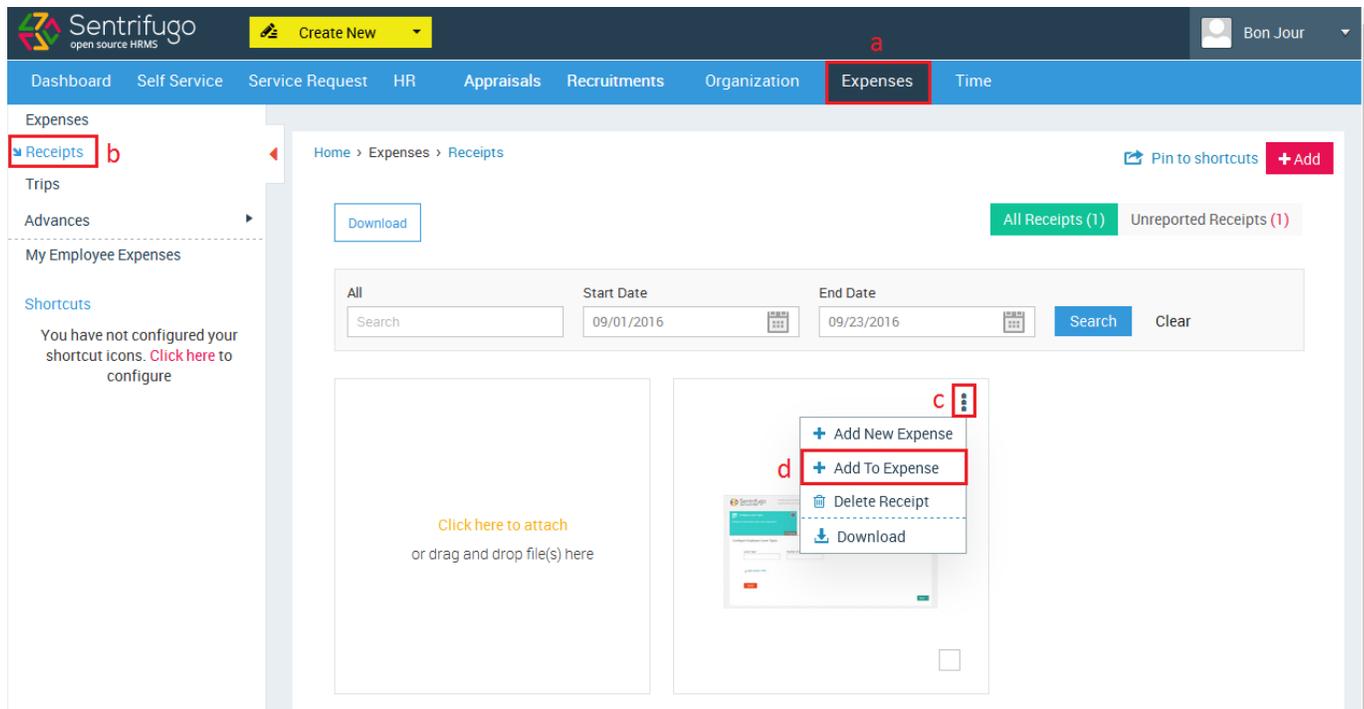


Figure 183

- 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*

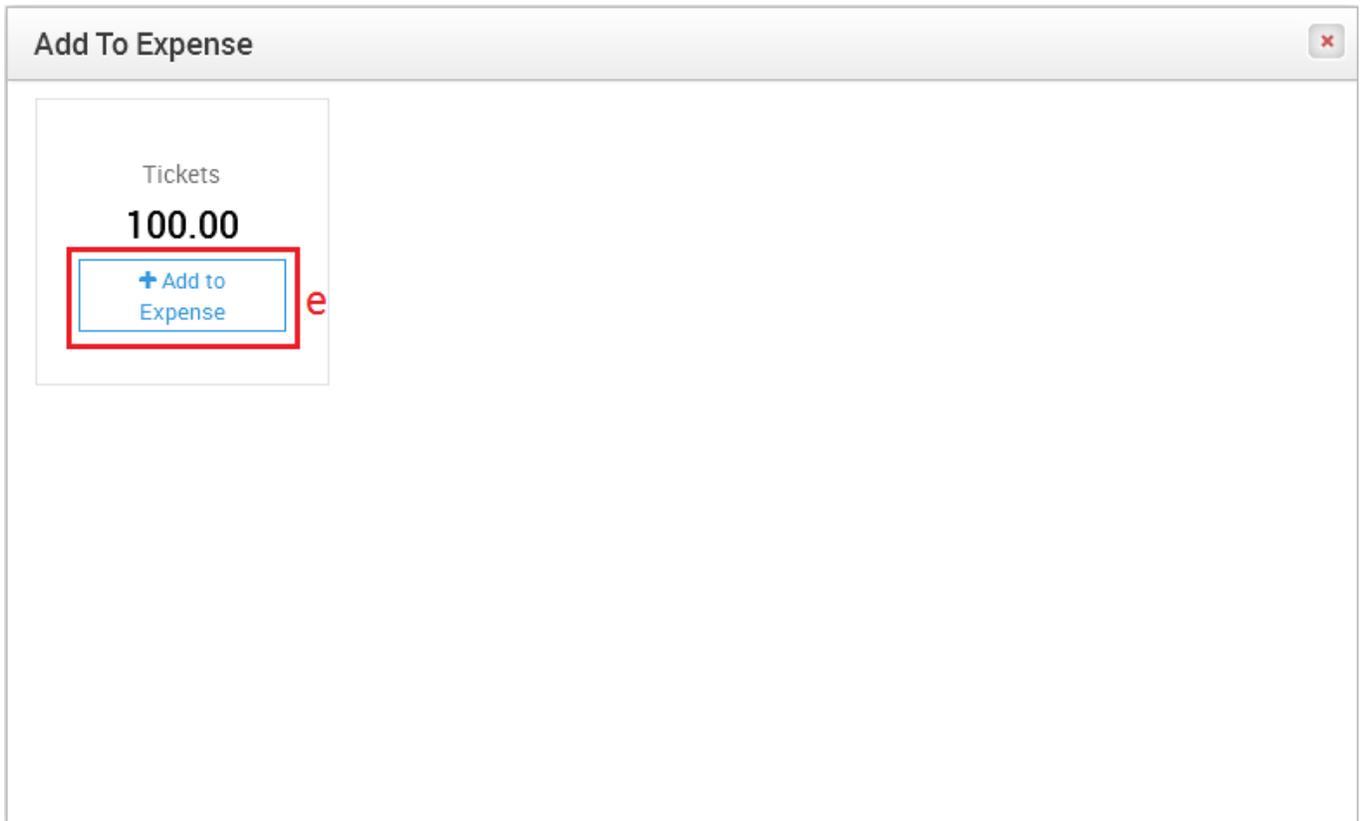
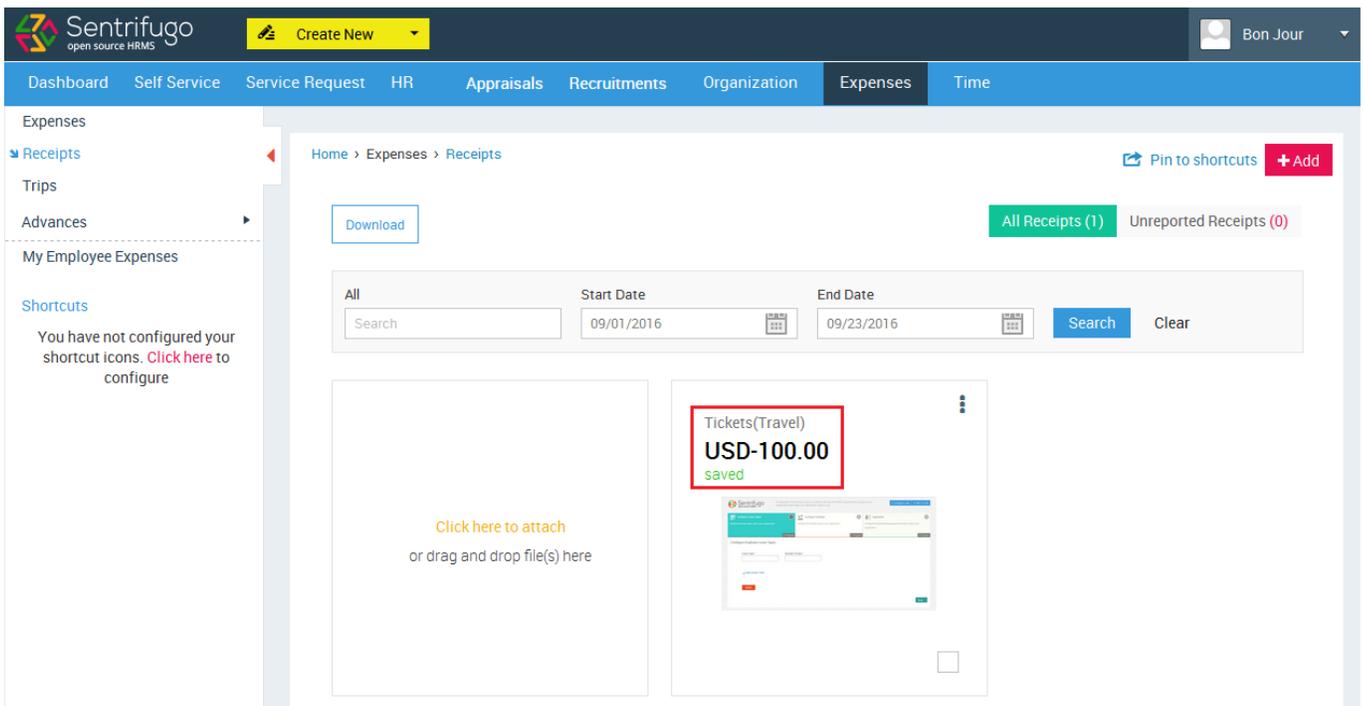


Figure 184

e. Click Add to Expense.

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

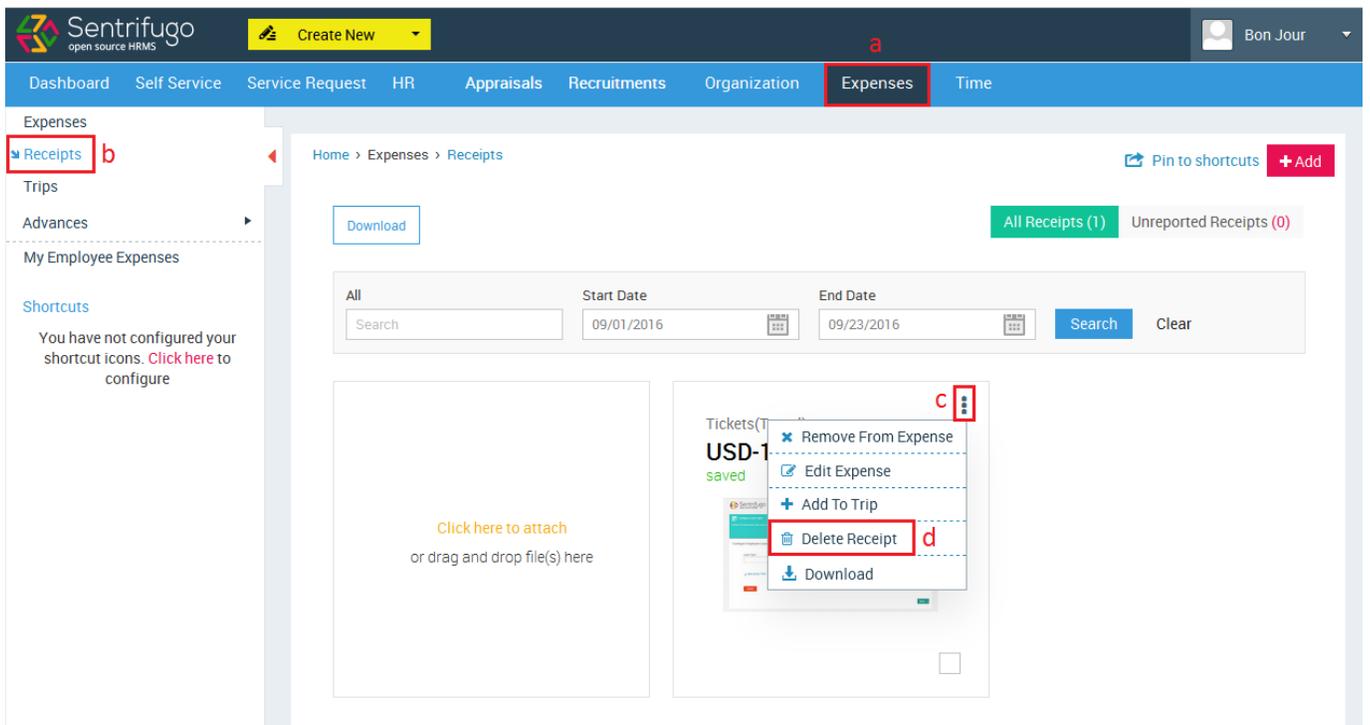




If you need to add a new expense after adding a receipt, then you can add expenses from Expenses > Receipts > Click on More Actions Button > Add New Expense.

14.13 How do I delete a Receipt?

Please refer Figure 185



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 is highlighted with a red box labeled 'a'. The left sidebar shows 'Expenses' with 'Receipts' selected, highlighted with a red box labeled 'b'. The main content area shows the 'Receipts' page with a 'Download' button, 'All Receipts (1)', and 'Unreported Receipts (0)'. There are search filters for 'All', 'Start Date', and 'End Date'. A receipt item is shown with a 'More Actions' icon (c) highlighted in red. The 'More Actions' menu is open, showing options: 'Remove From Expense', 'Edit Expense', 'Add To Trip', 'Delete Receipt' (d), and 'Download'. The 'Delete Receipt' option is highlighted with a red box.

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

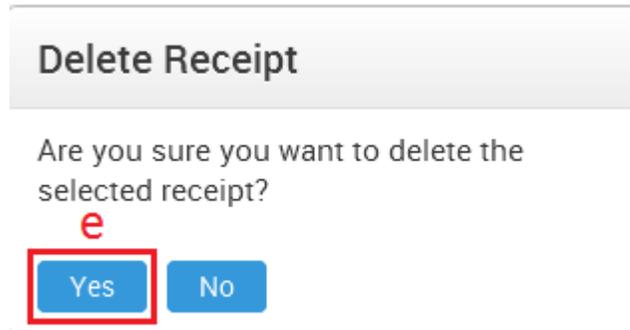


Figure 186

- 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

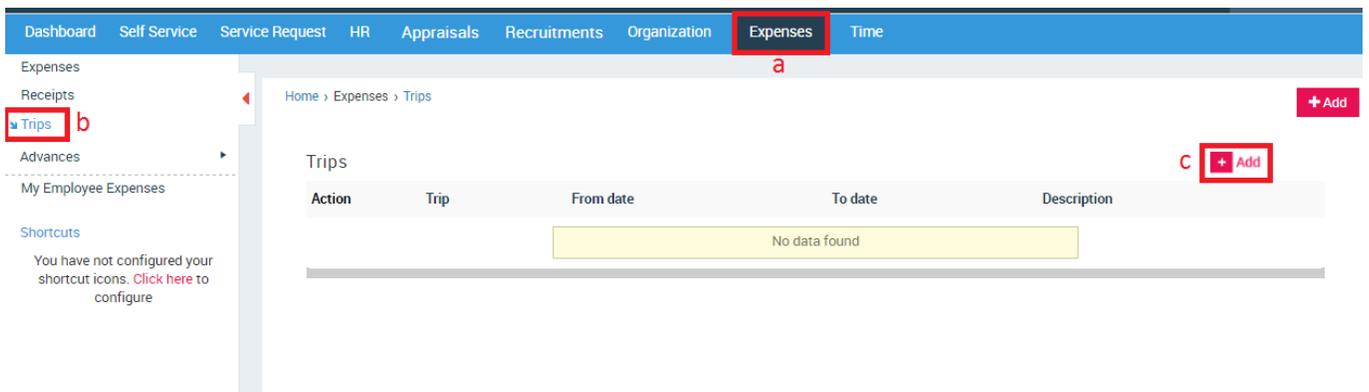


Figure 187

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

Please refer Figure 188

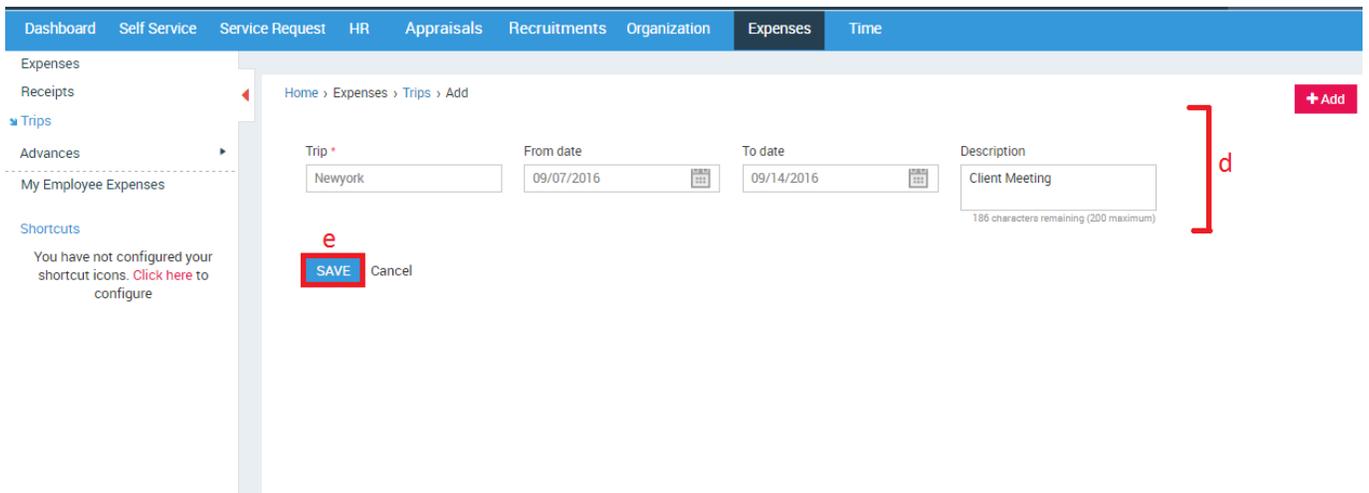


Figure 188

- 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

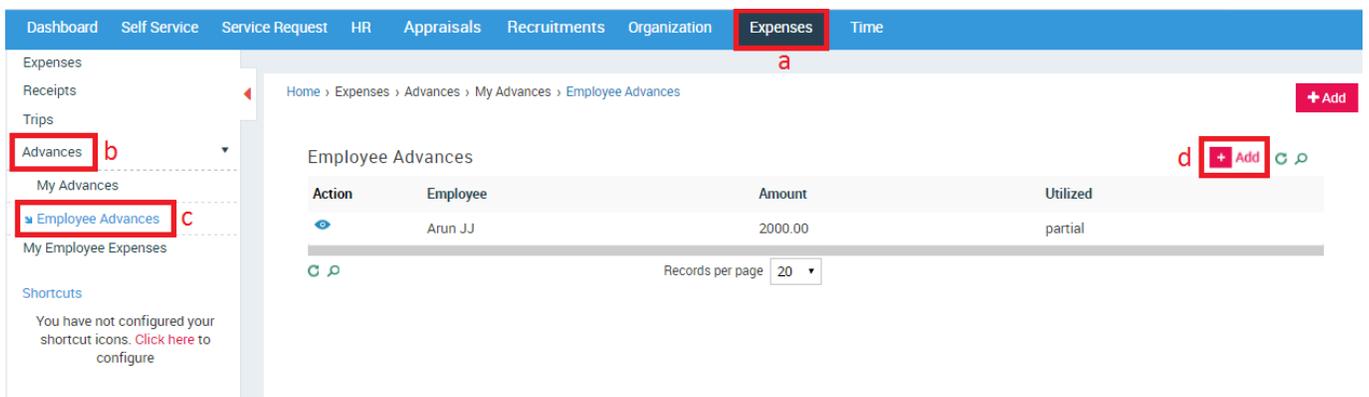


Figure 189

- 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

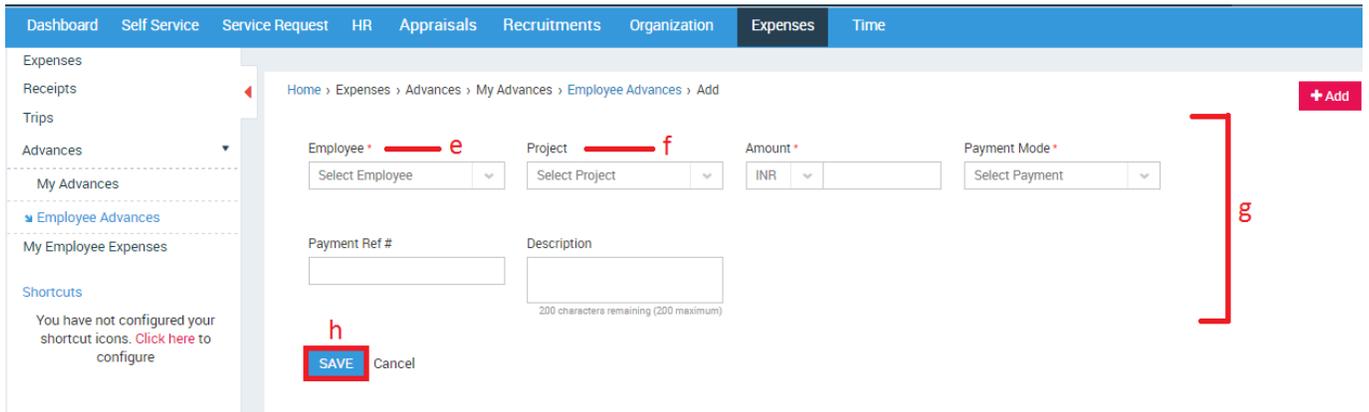


Figure 190

- 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

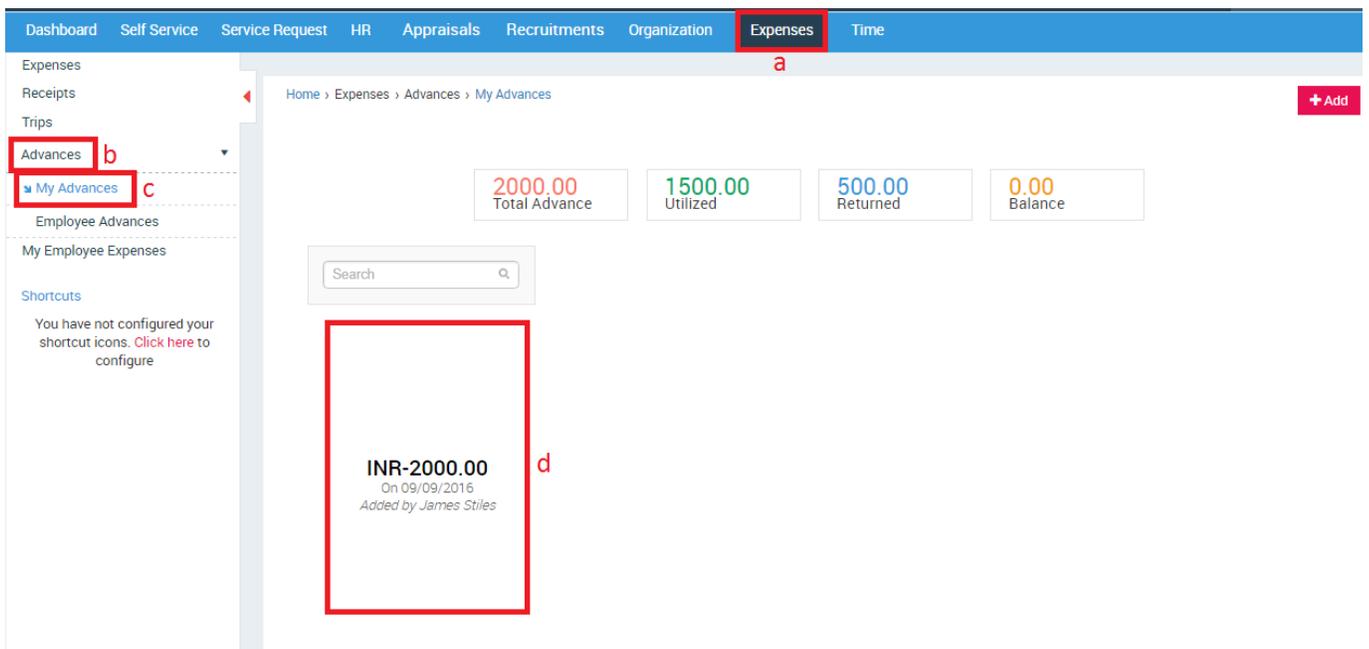


Figure 191

- 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

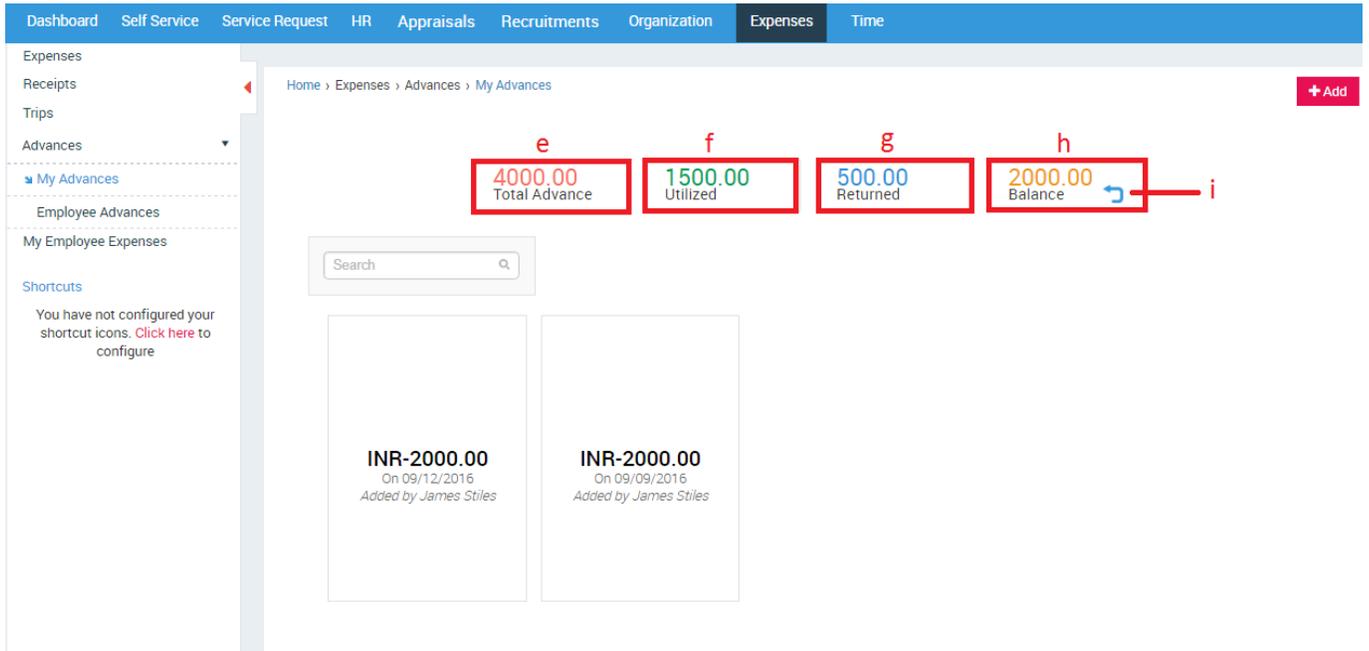


Figure 192

- 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

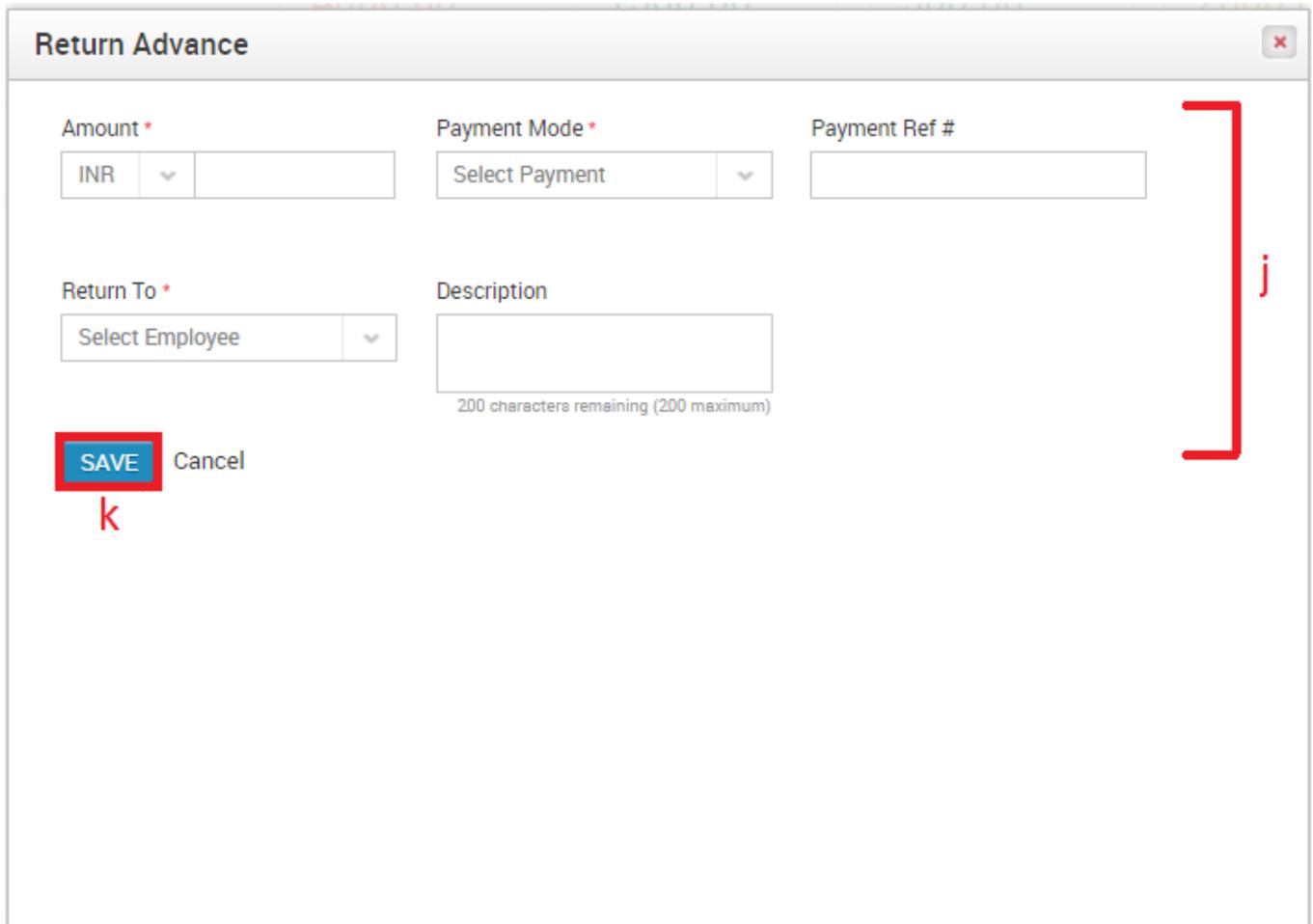
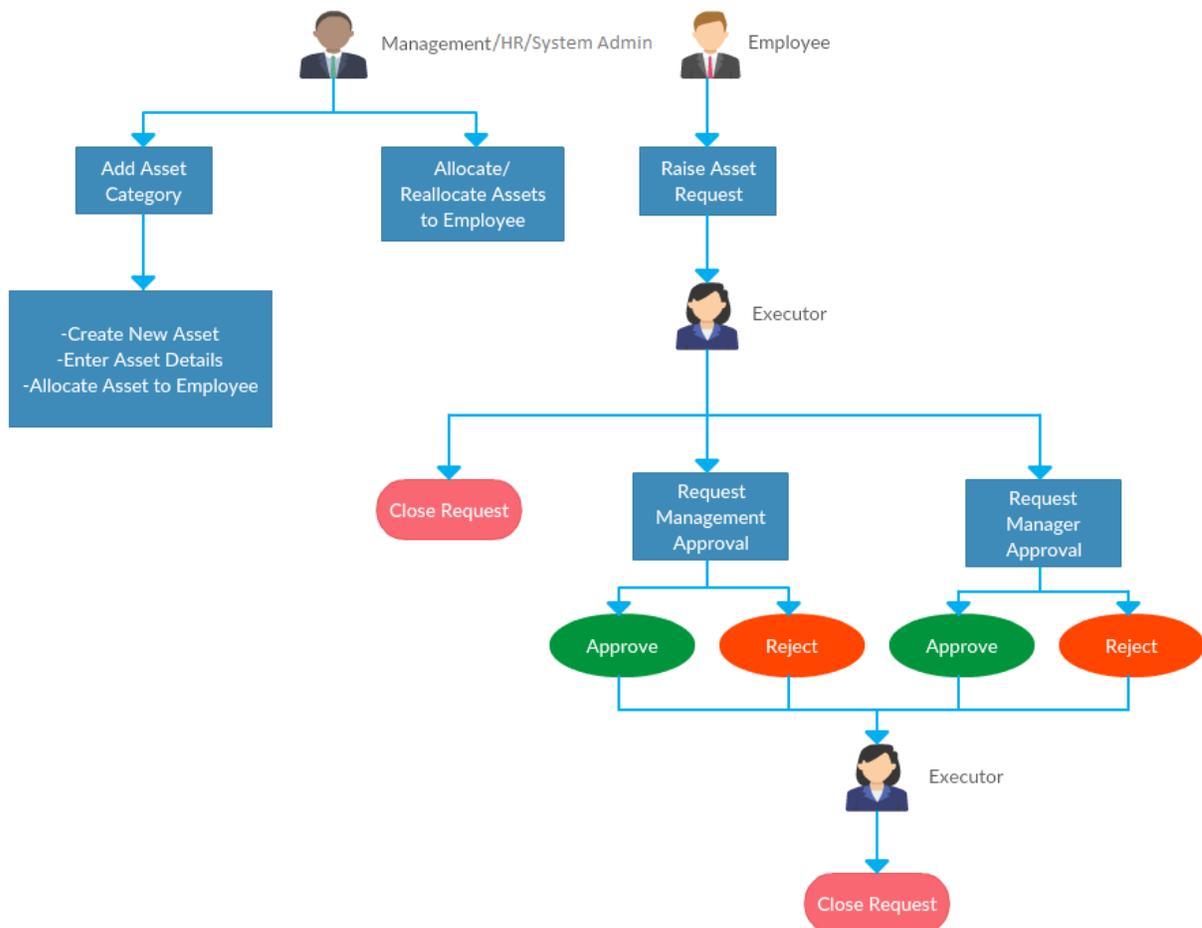


Figure 193

- 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

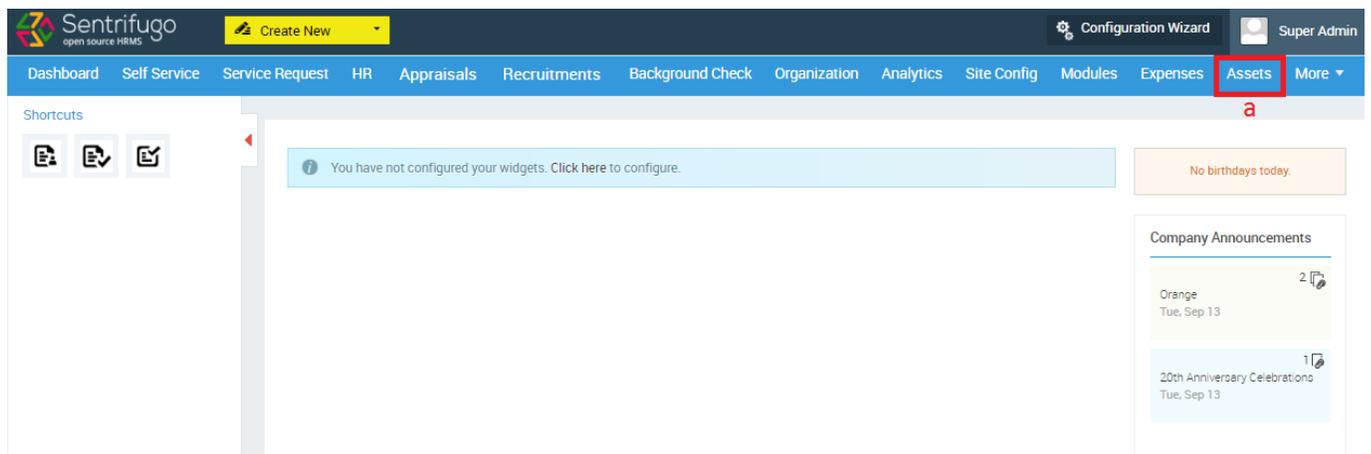


Figure 194

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

Please refer Figure 195

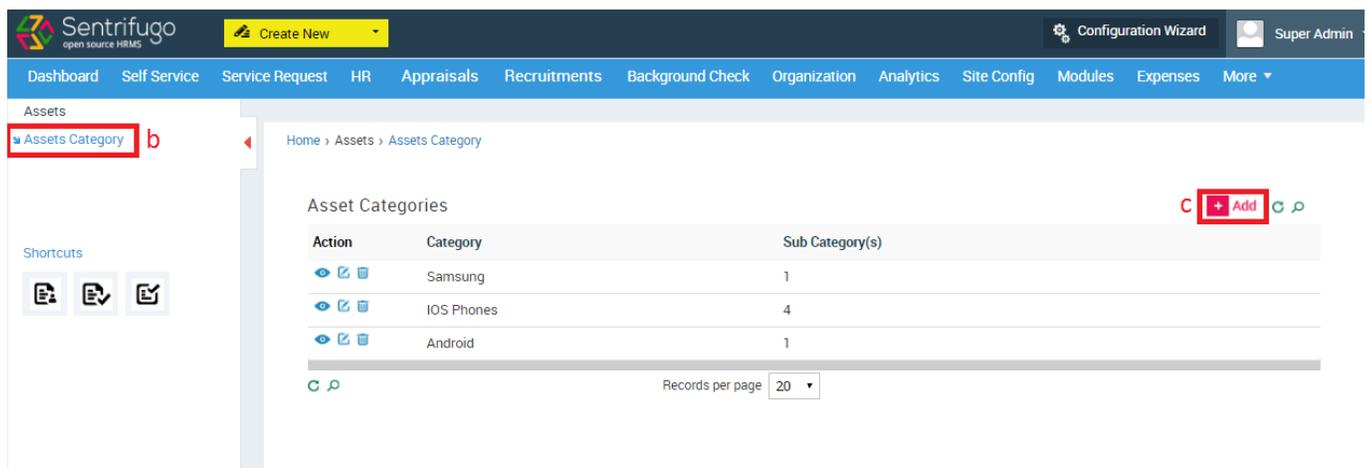


Figure 195

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

Please refer Figure 196

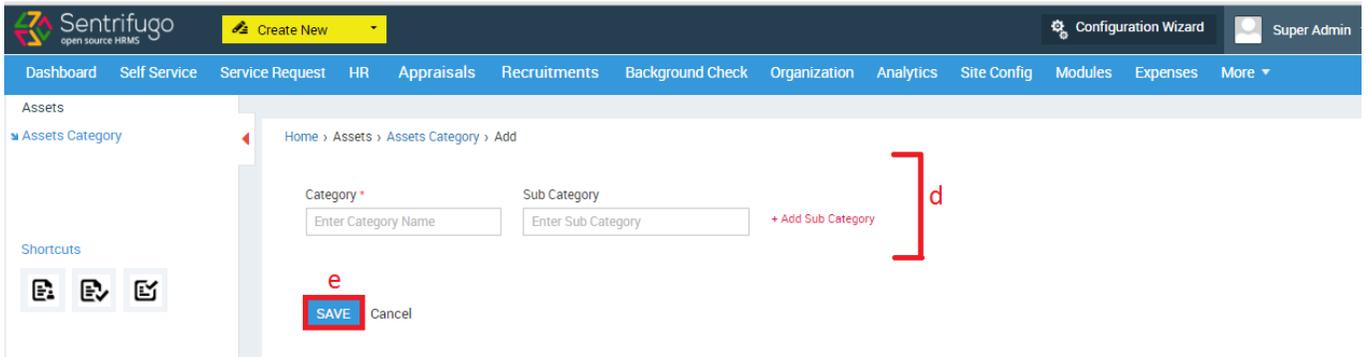


Figure 196

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

15.2 How do I add an Asset?

Please refer Figure 197

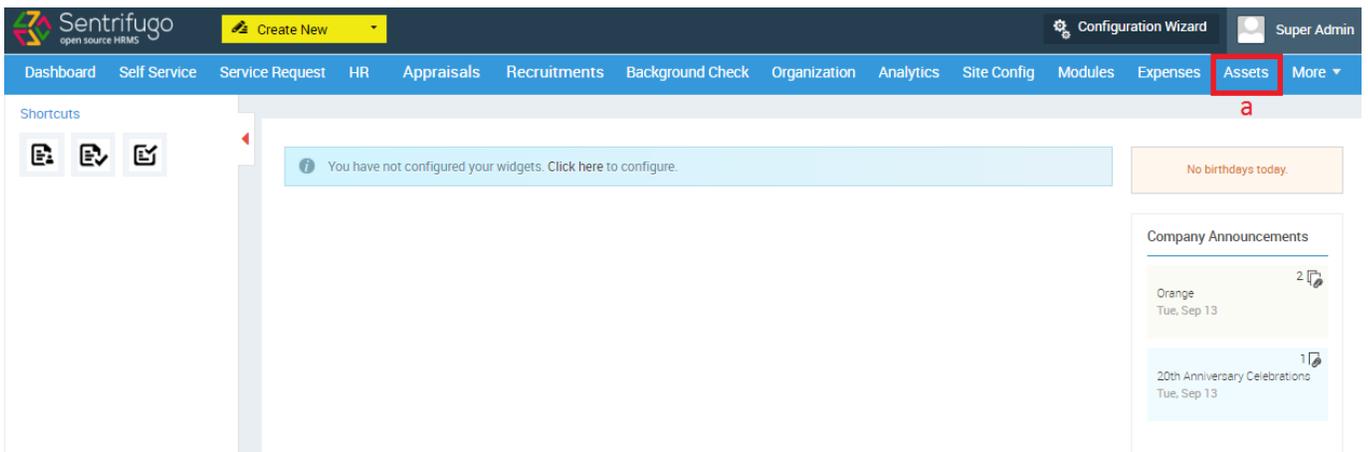


Figure 197

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

Please refer Figure 198

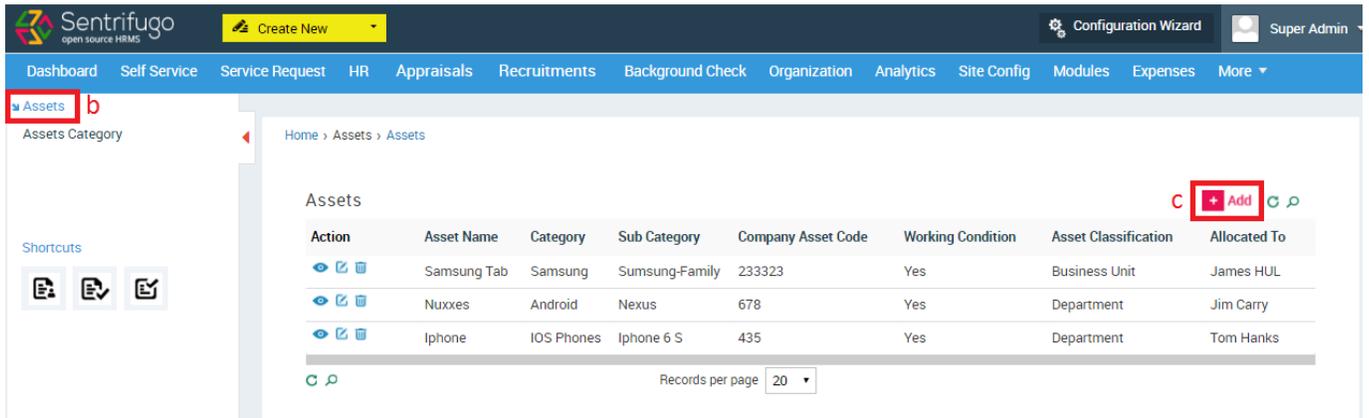


Figure 198

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

Please refer Figure 199

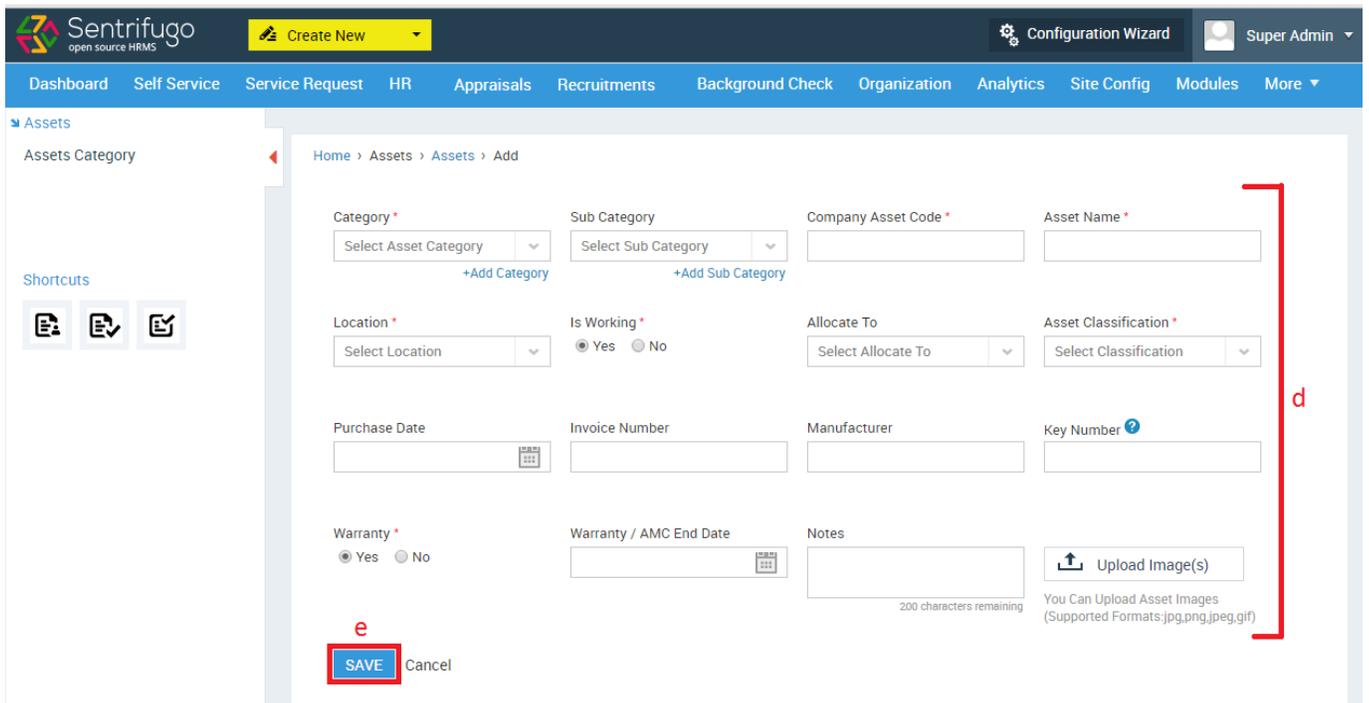
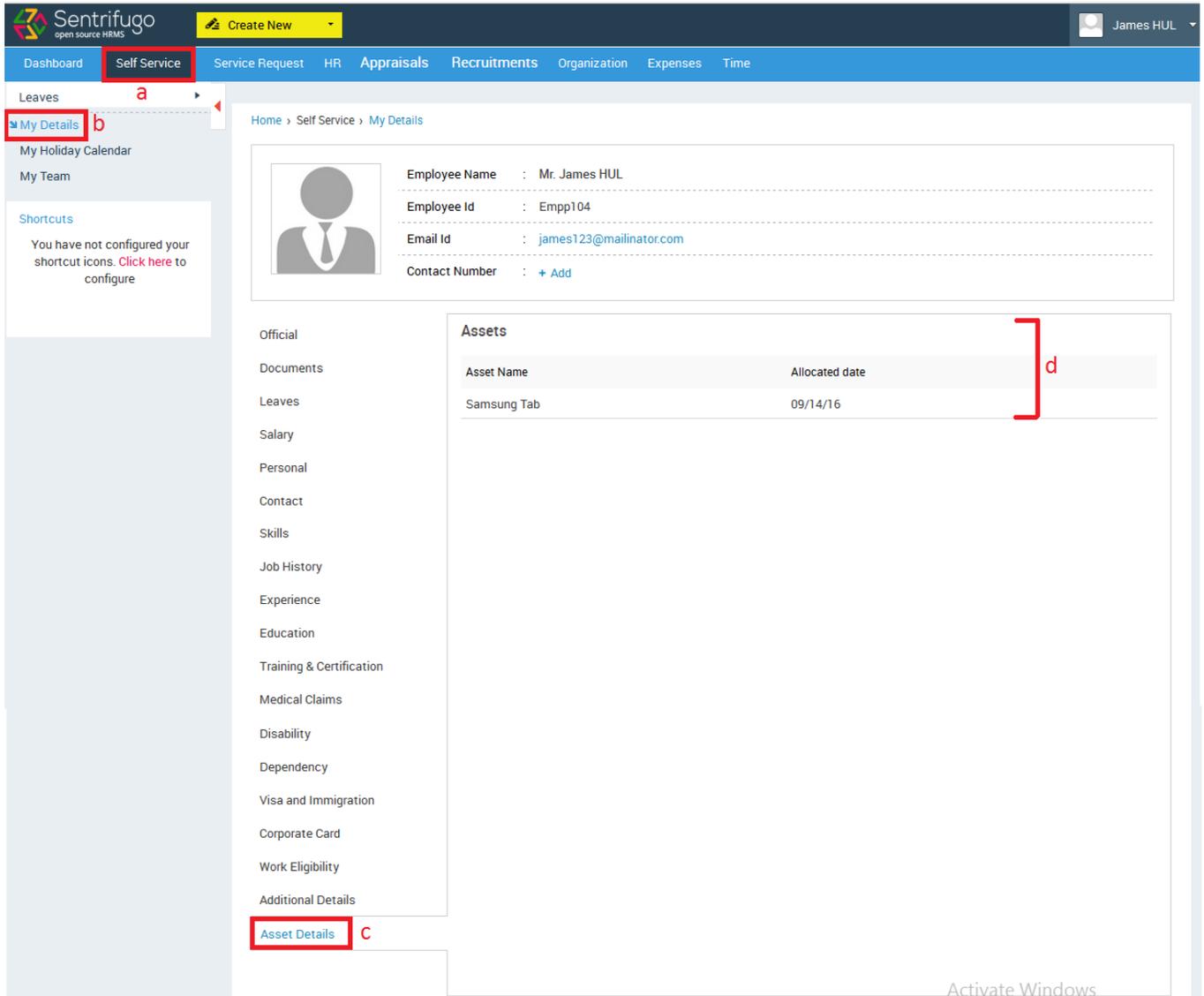


Figure 199

- 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

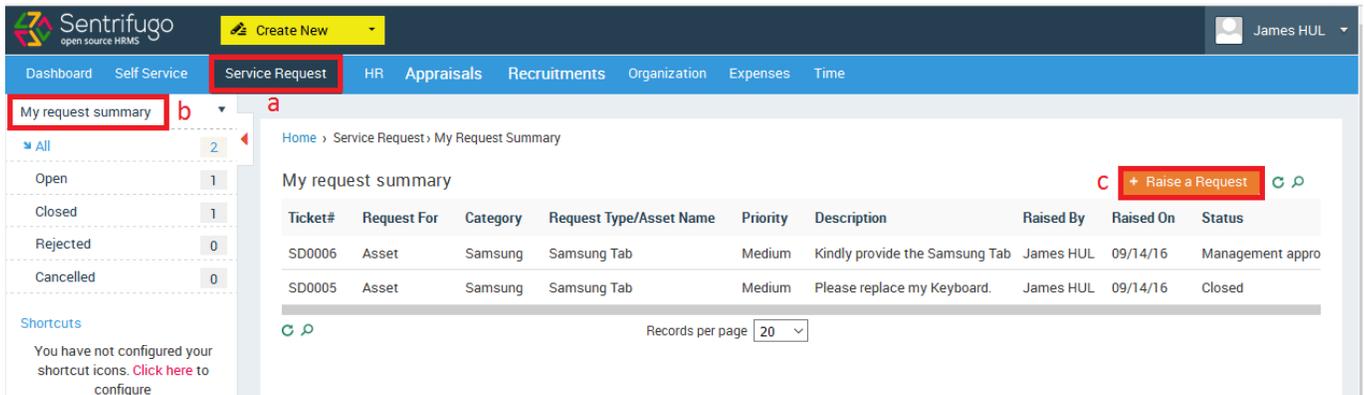
Activate Windows

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 requests:

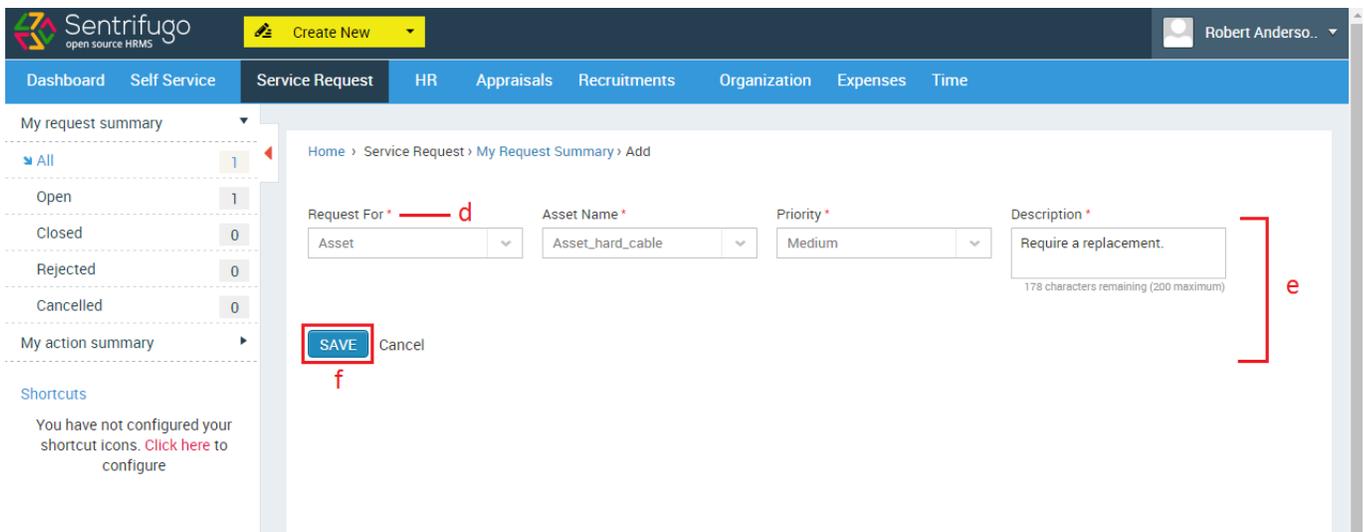
Ticket#	Request For	Category	Request Type/Asset Name	Priority	Description	Raised By	Raised On	Status
SD0006	Asset	Samsung	Samsung Tab	Medium	Kindly provide the Samsung Tab	James HUL	09/14/16	Management appro
SD0005	Asset	Samsung	Samsung Tab	Medium	Please replace my Keyboard.	James HUL	09/14/16	Closed

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 form has 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 says '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

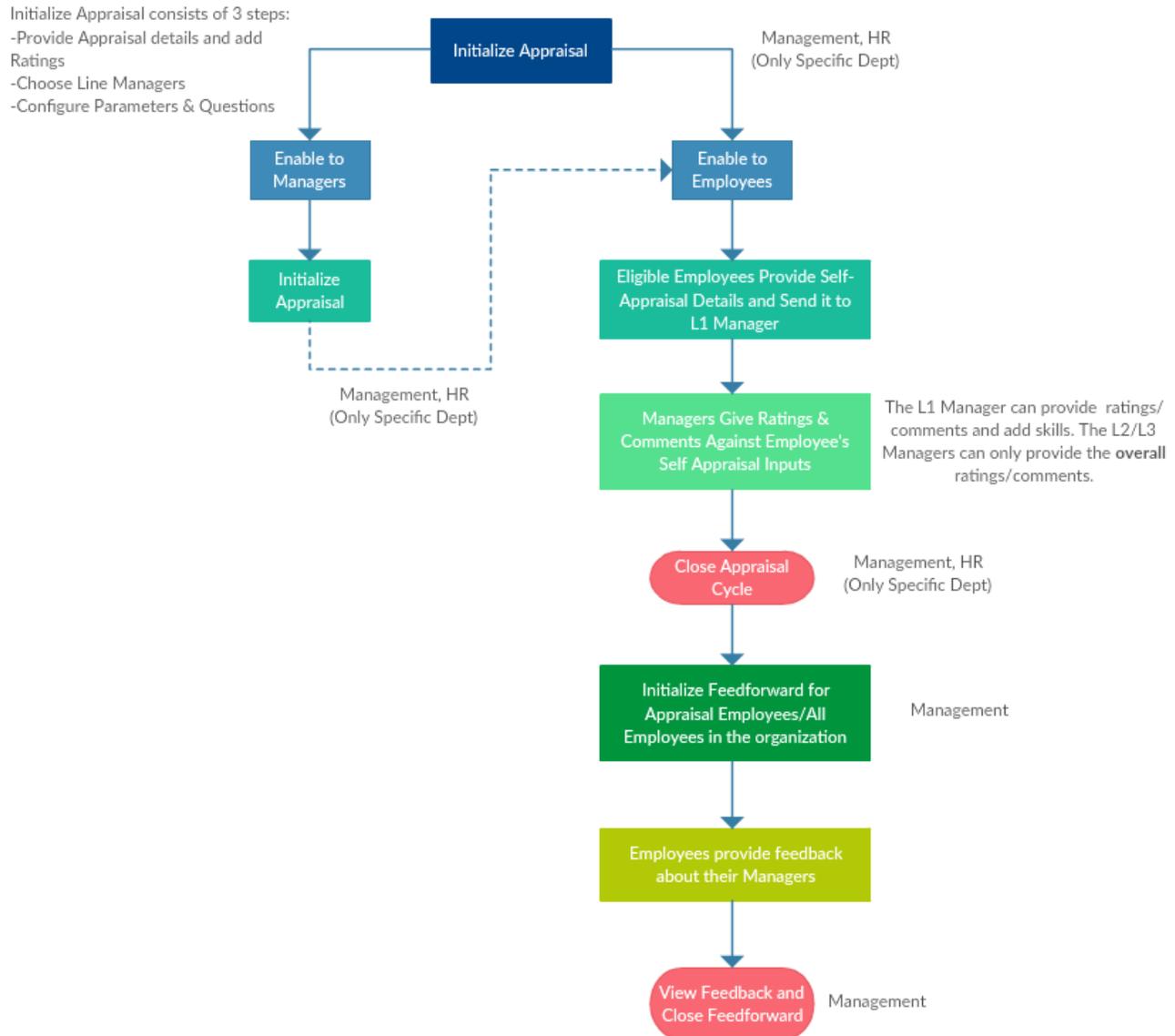
- Select **Asset** in the field 'Request For'
- Fill in the required details
- Click **SAVE** button



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:



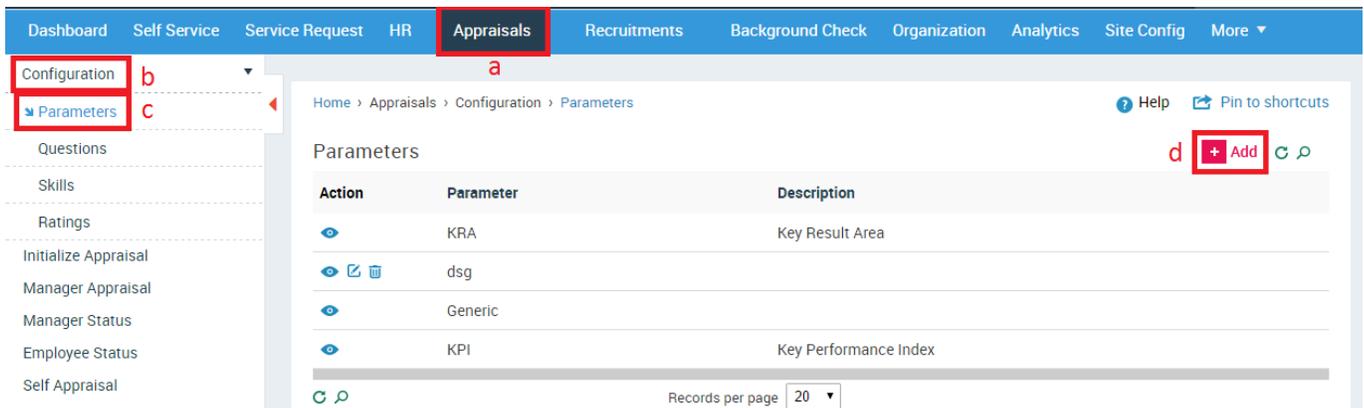
Process Description:

- 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

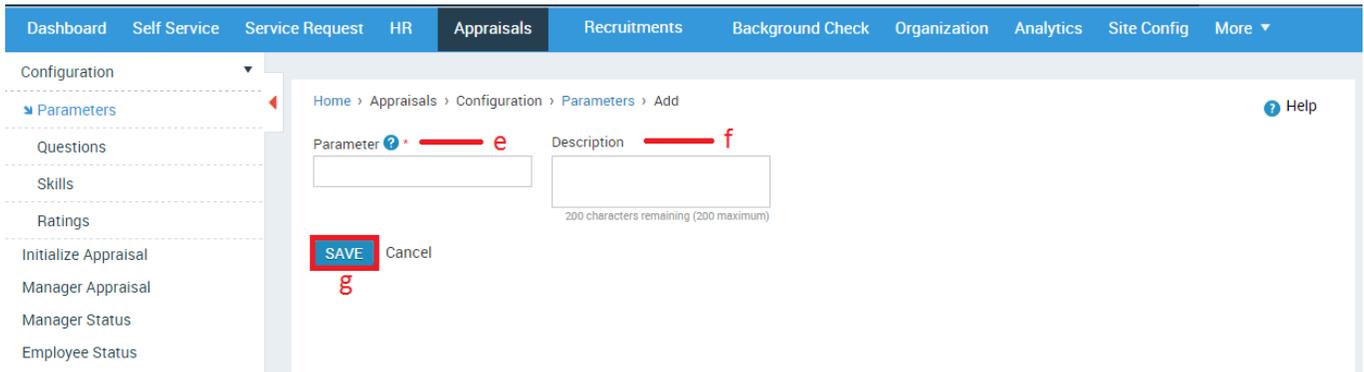


Figure 204

- 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

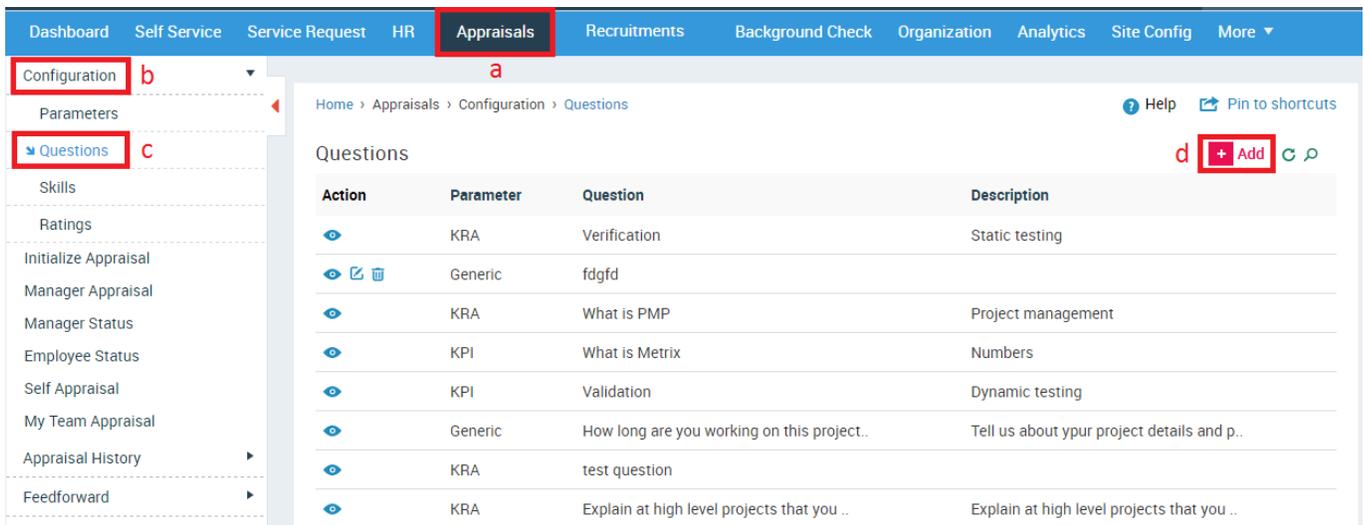


Figure 205

- 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

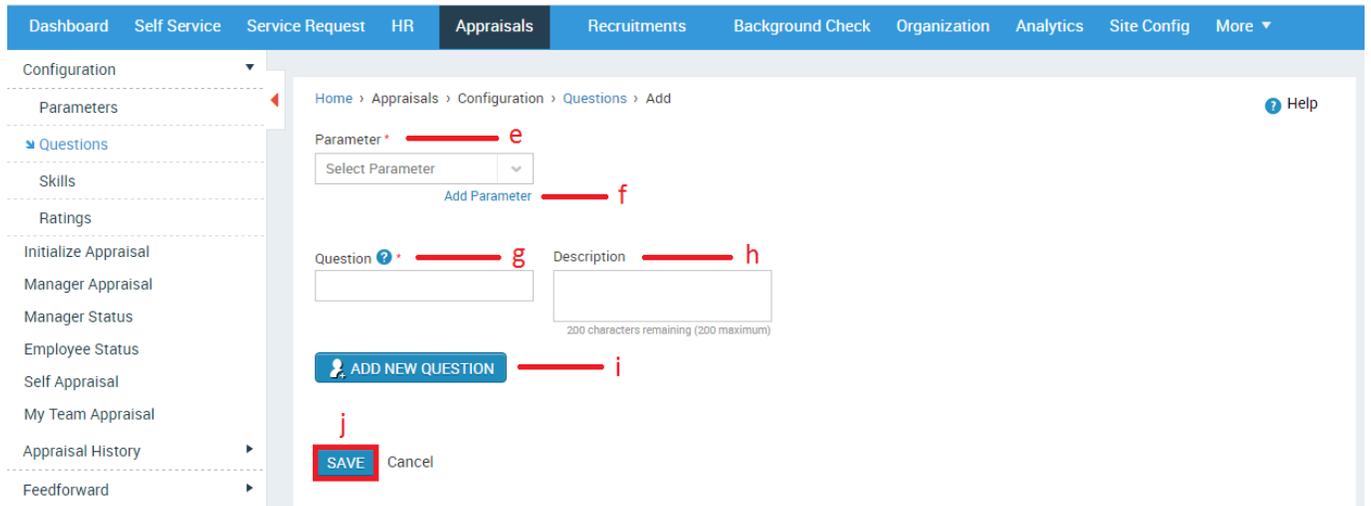


Figure 206

- 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

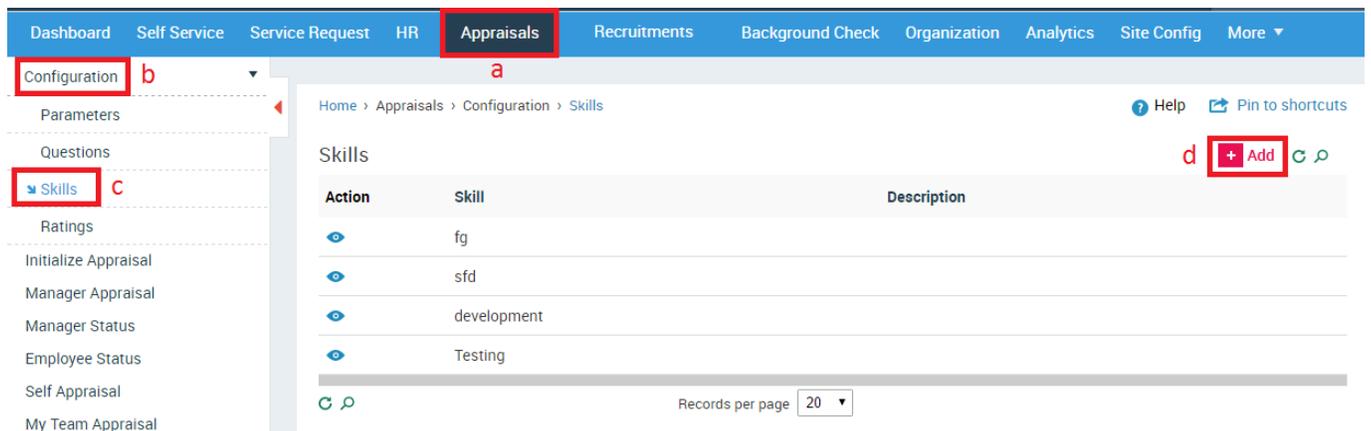


Figure 207

- 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

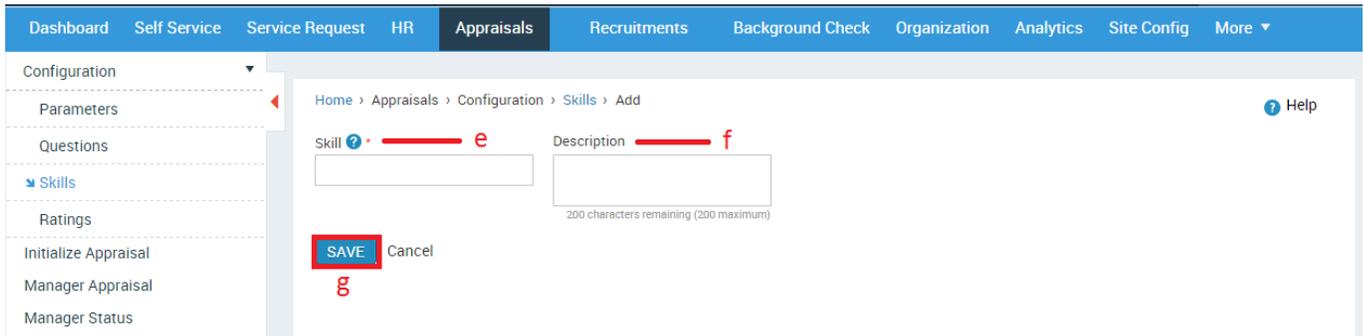


Figure 208

- 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

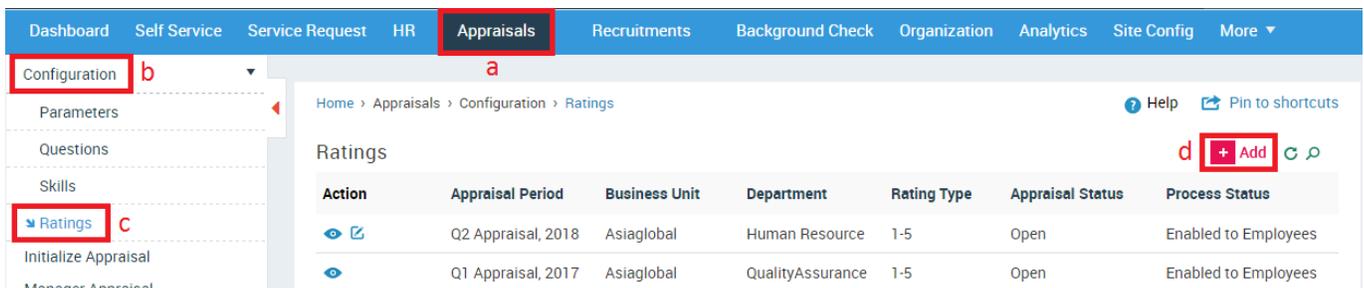


Figure 209

- 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

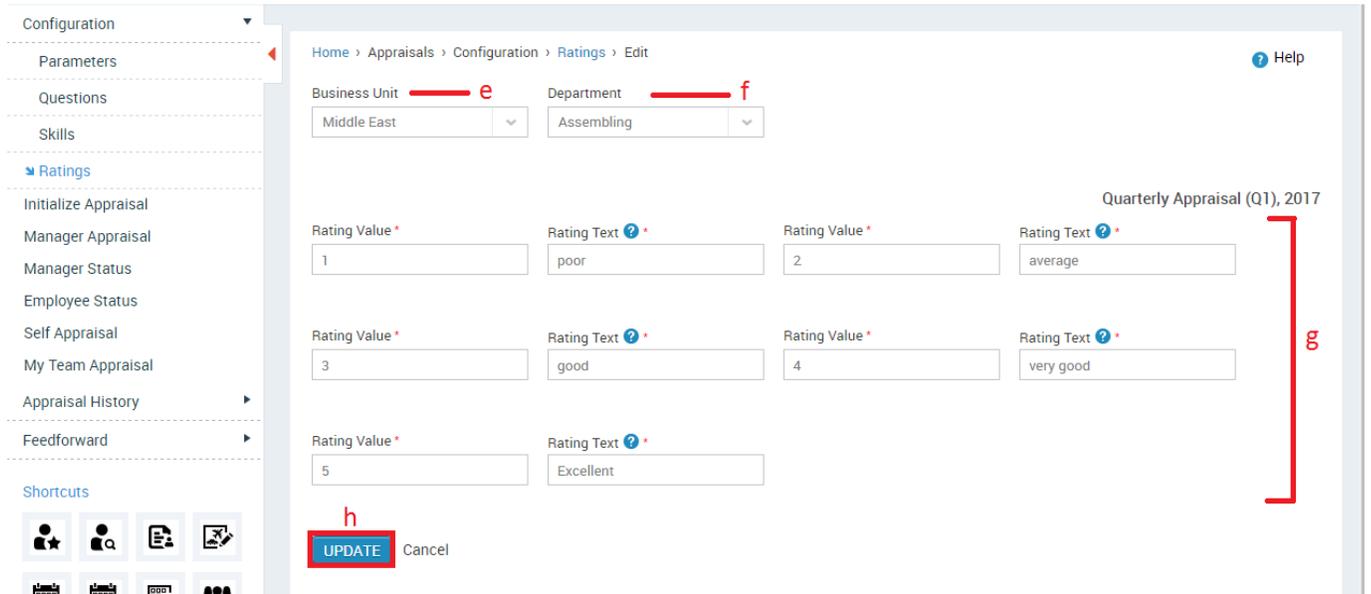


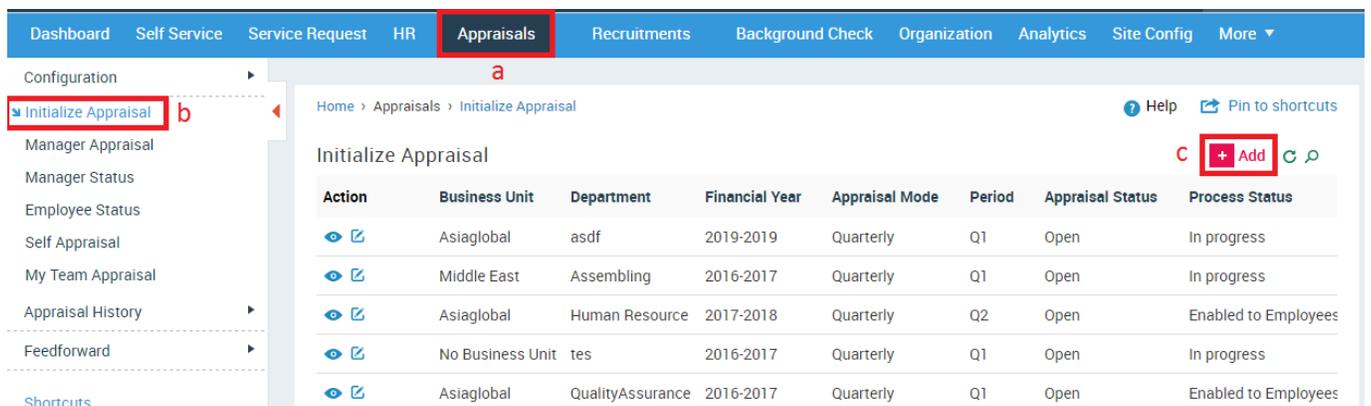
Figure 210

- 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

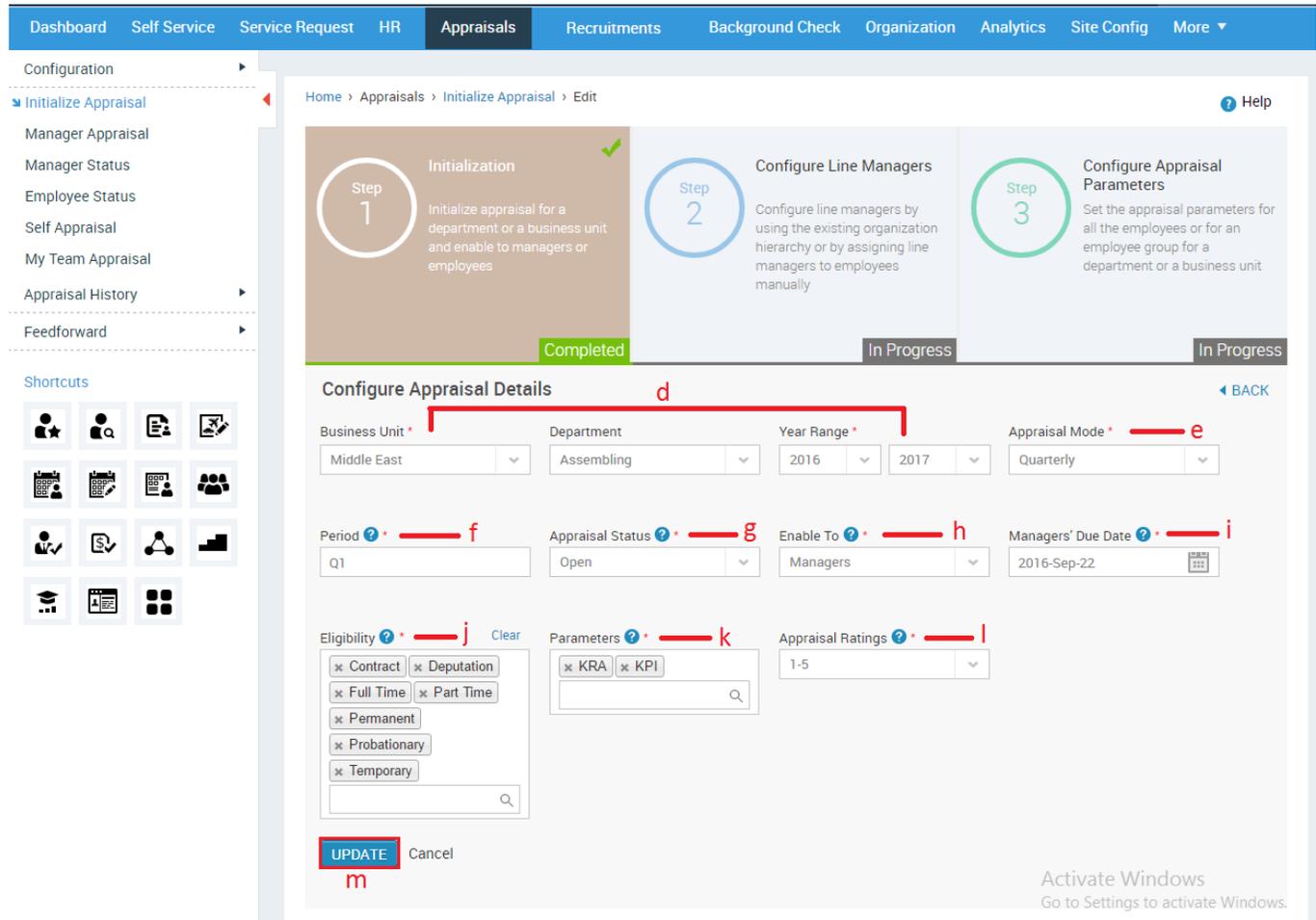


Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
	Asiaglobal	asdf	2019-2019	Quarterly	Q1	Open	In progress
	Middle East	Assembling	2016-2017	Quarterly	Q1	Open	In progress
	Asiaglobal	Human Resource	2017-2018	Quarterly	Q2	Open	Enabled to Employees
	No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



The screenshot shows the 'Initialize Appraisal' form in the Sentrifugo HRMS. The form is divided into three steps: Step 1 (Initialization, Completed), Step 2 (Configure Line Managers, In Progress), and Step 3 (Configure Appraisal Parameters, In Progress). The 'Configure Appraisal Details' section includes fields for Business Unit (Middle East), Department (Assembling), Year Range (2016-2017), Appraisal Mode (Quarterly), Period (Q1), Appraisal Status (Open), Enable To (Managers), Managers' Due Date (2016-Sep-22), Eligibility (Contract, Deputation, Full Time, Part Time, Permanent, Probationary, Temporary), Parameters (KRA, KPI), and Appraisal Ratings (1-5). A red box highlights the 'UPDATE' button.

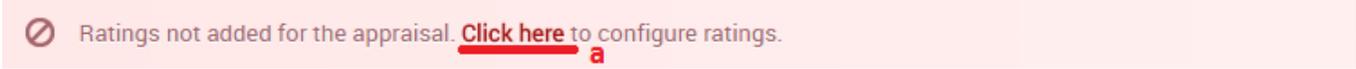
Figure 212

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

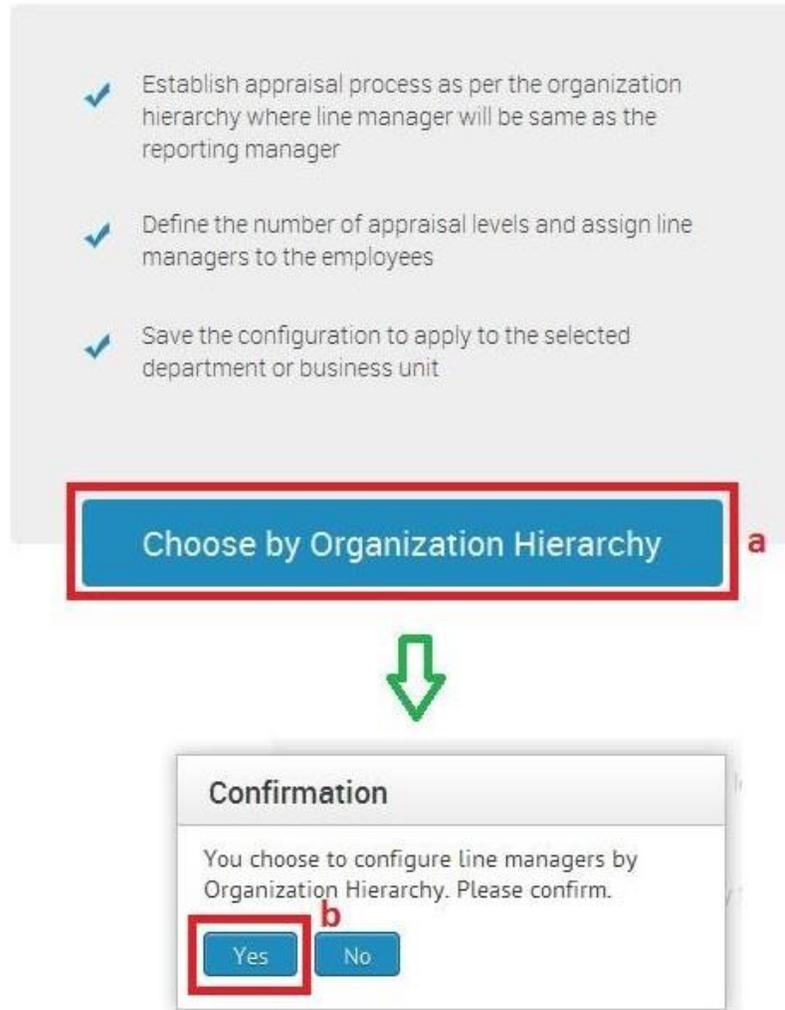


Figure 214

- 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	d 
 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

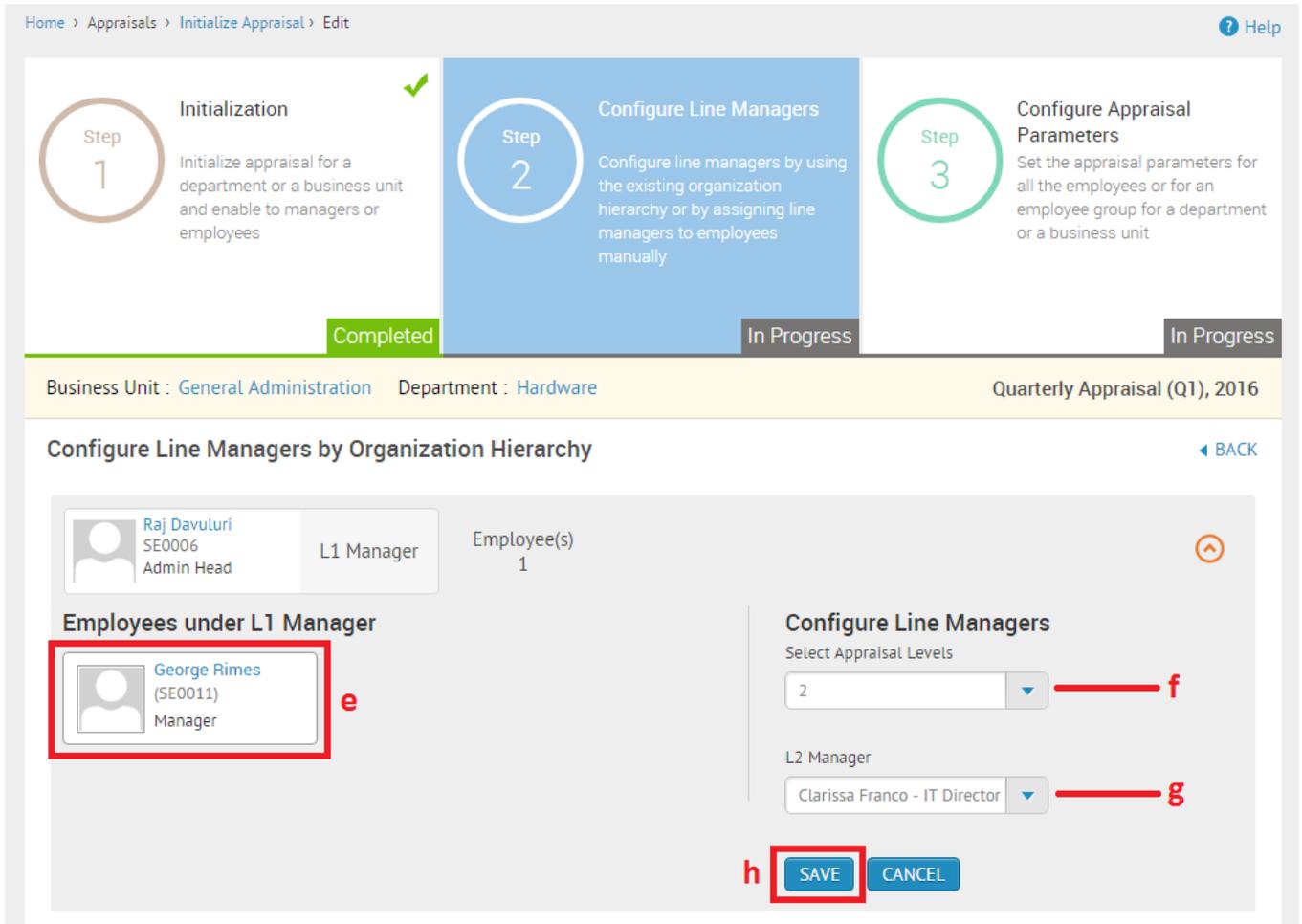


Figure 216

- 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

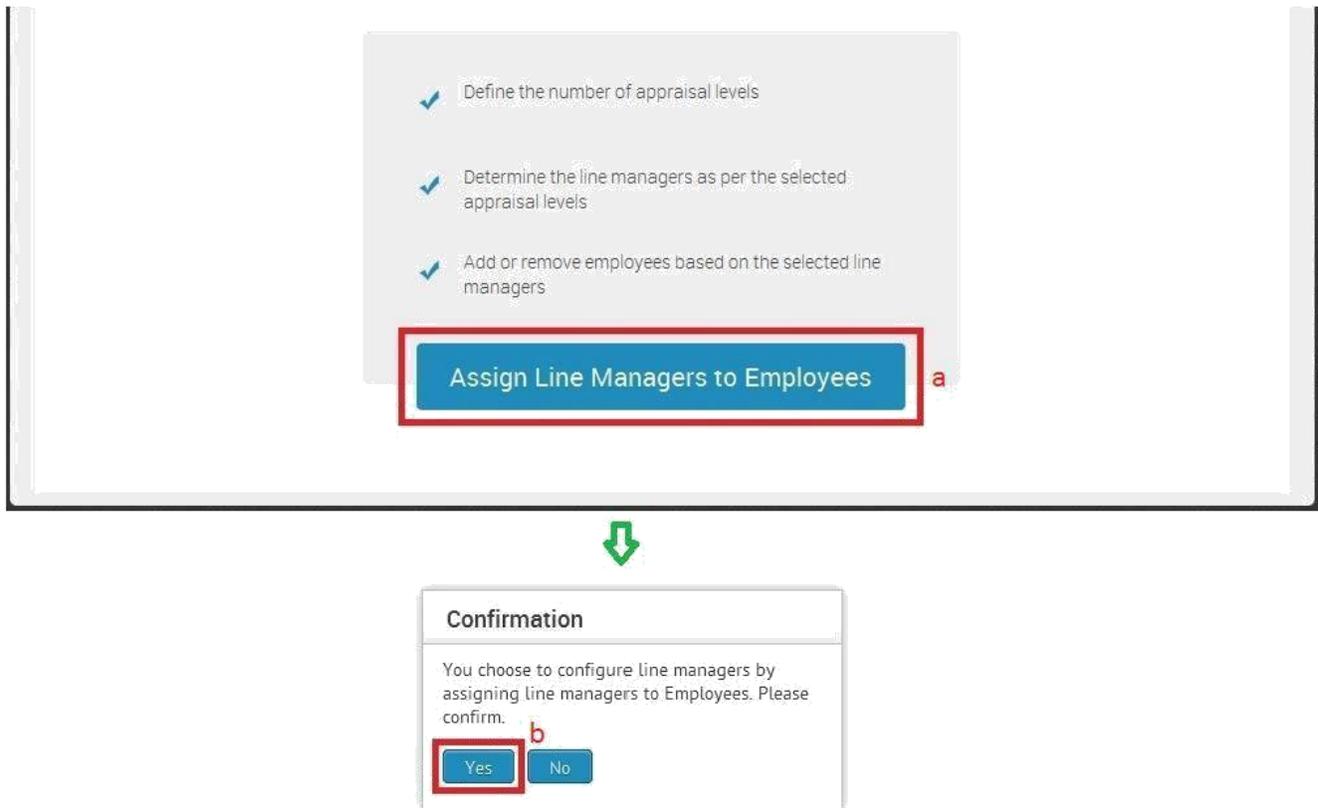


Figure 217

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

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 218

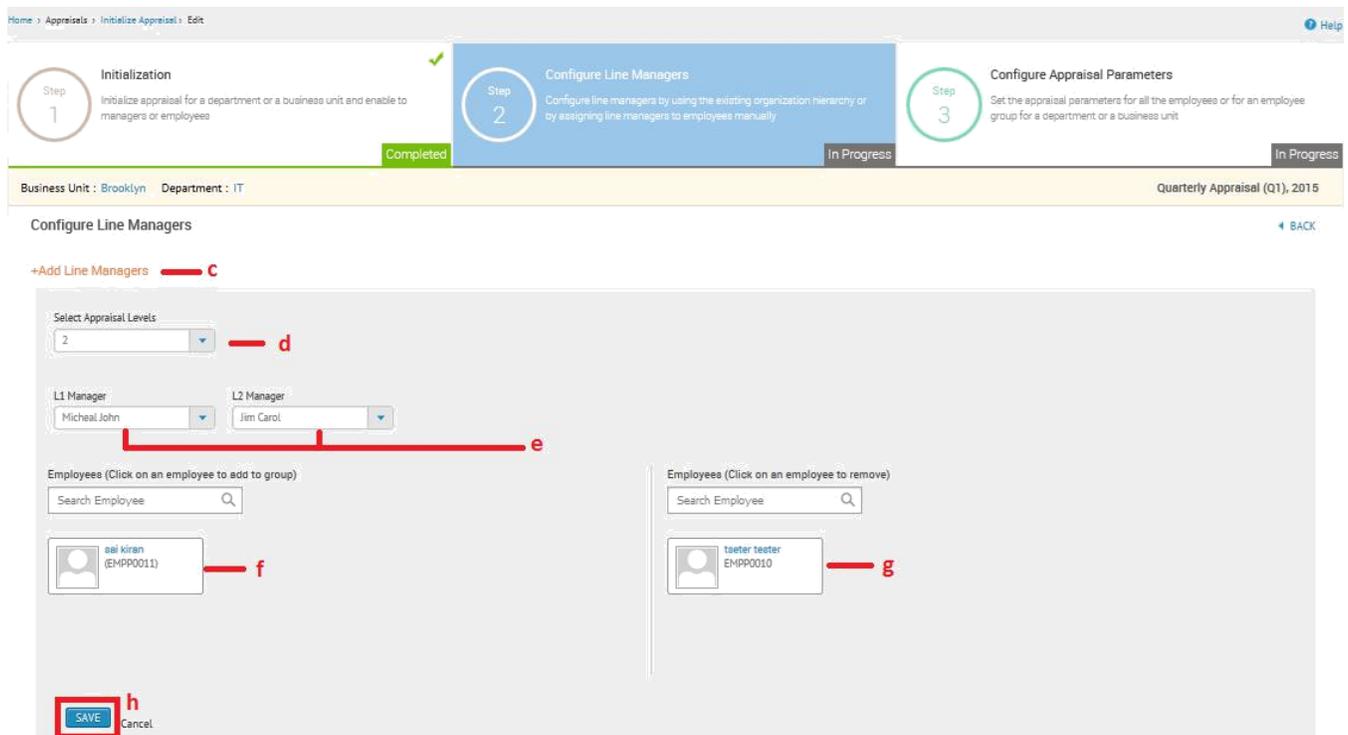


Figure 218

- 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

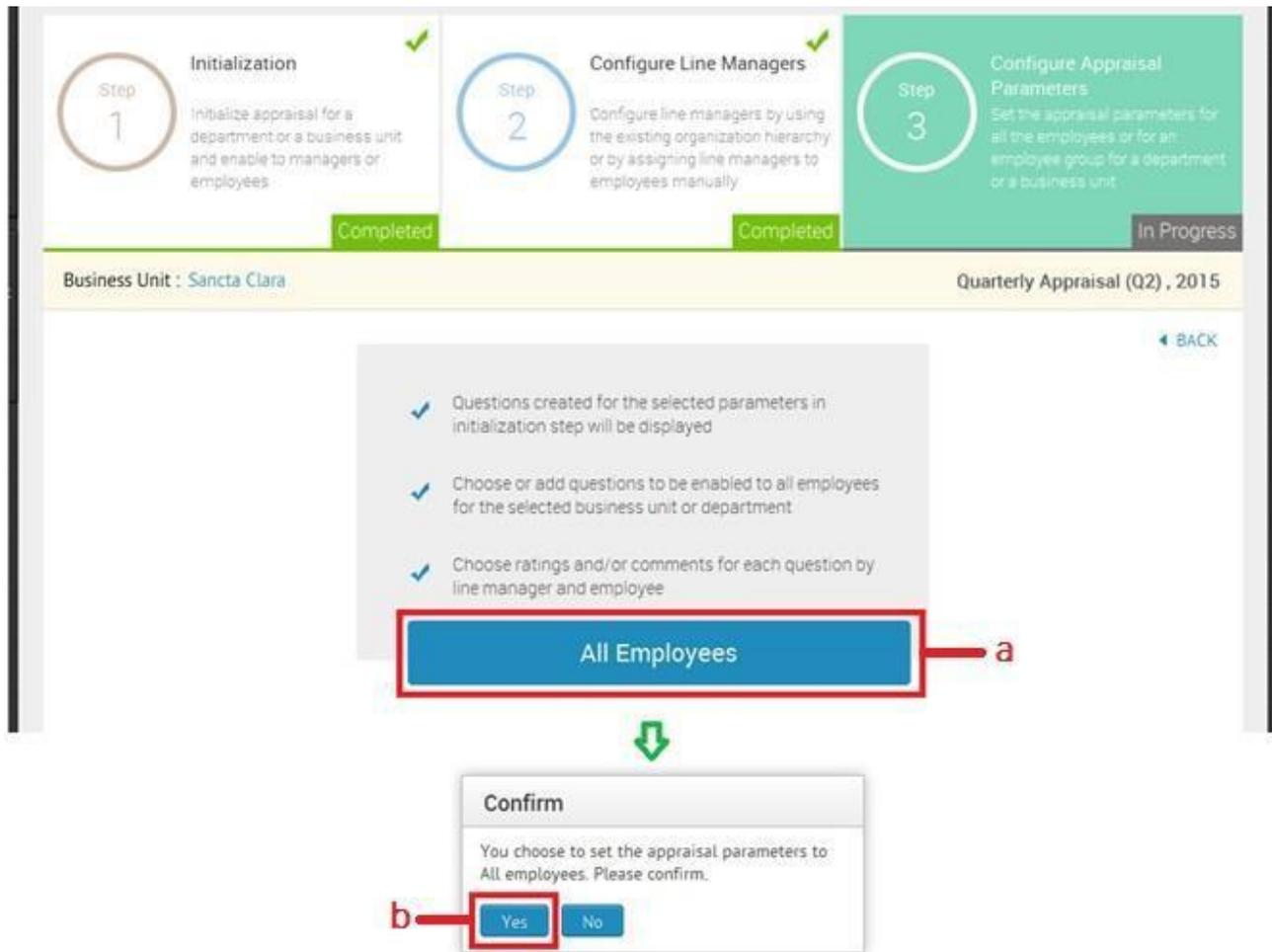


Figure 219

a. Click **All Employees**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 220

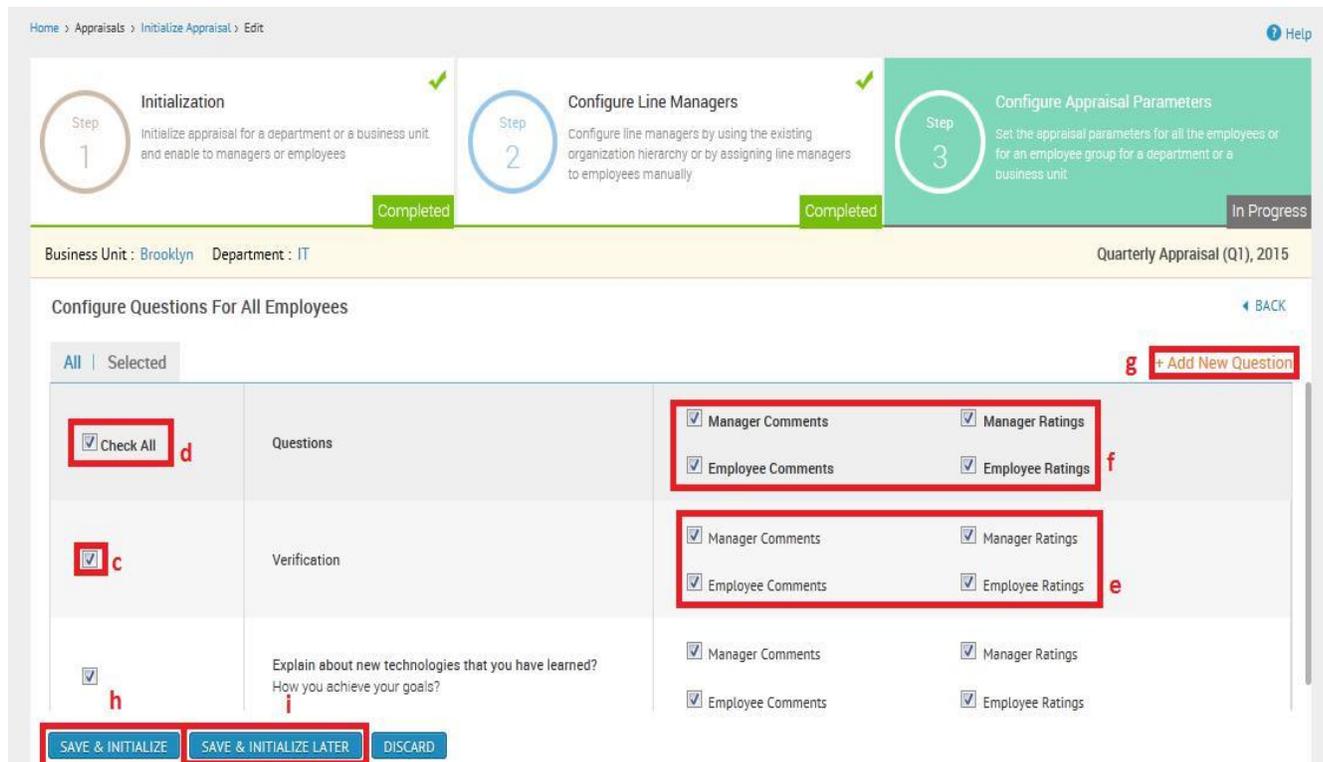


Figure 220

- 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

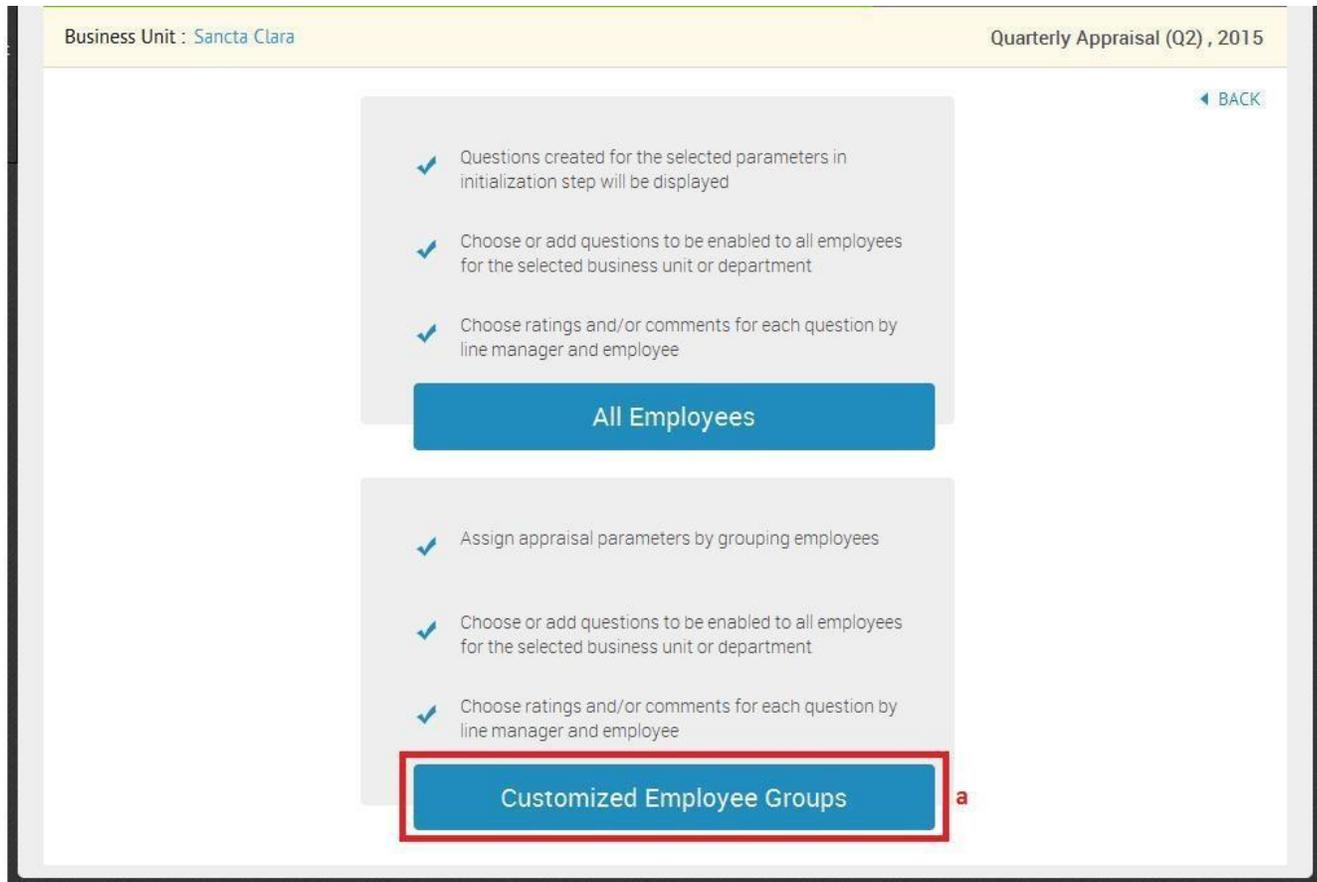


Figure 222

a. Click **Customized Employee Groups**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 223

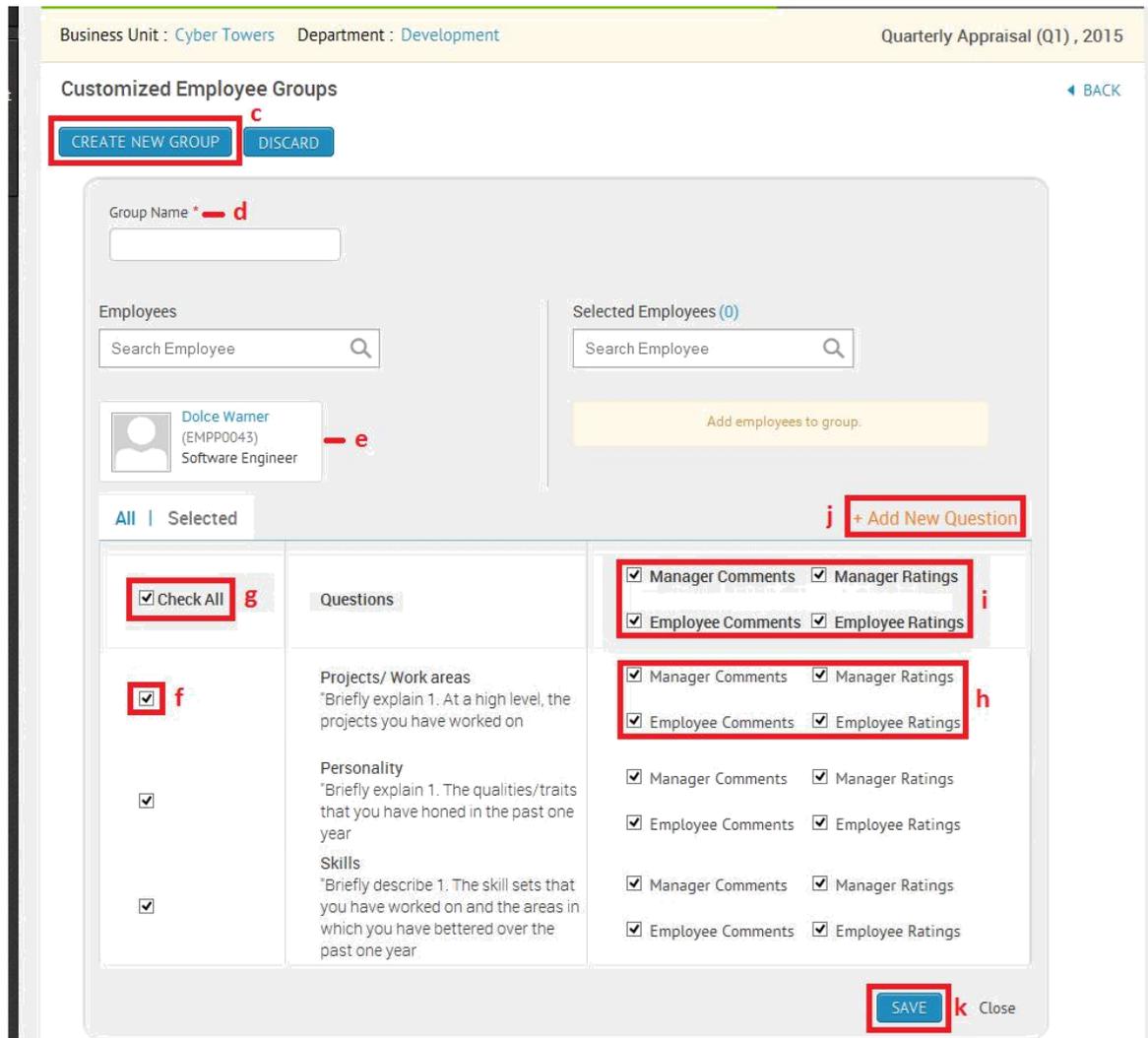


Figure 223

- 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

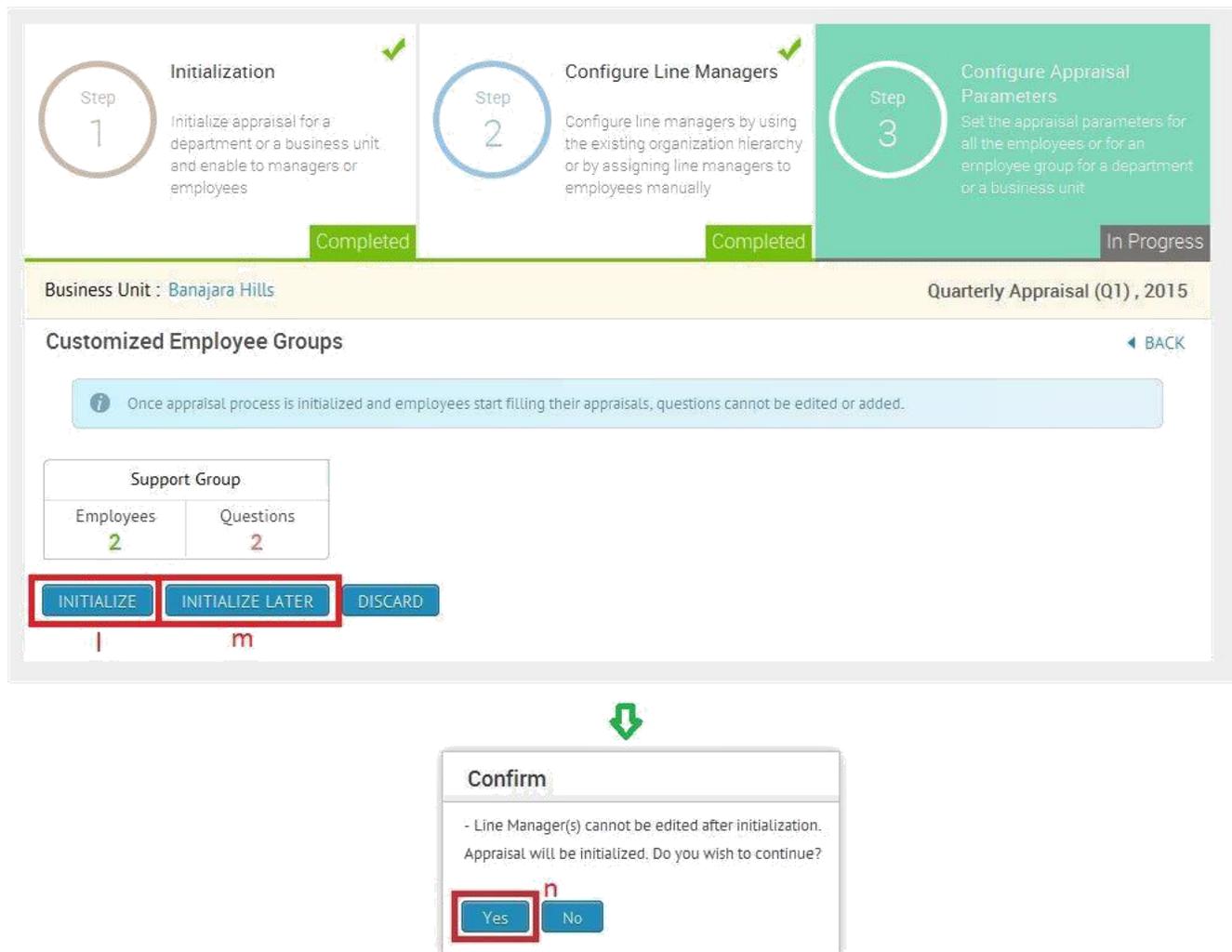


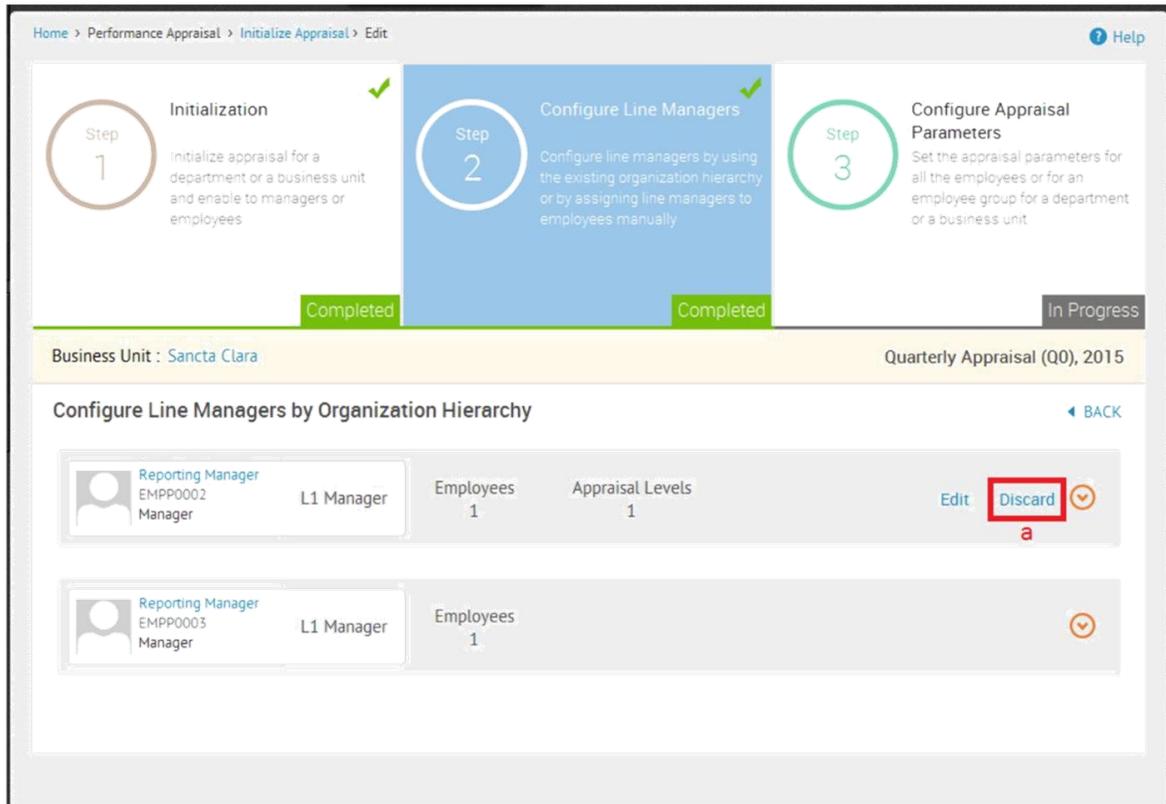
Figure 224

- 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

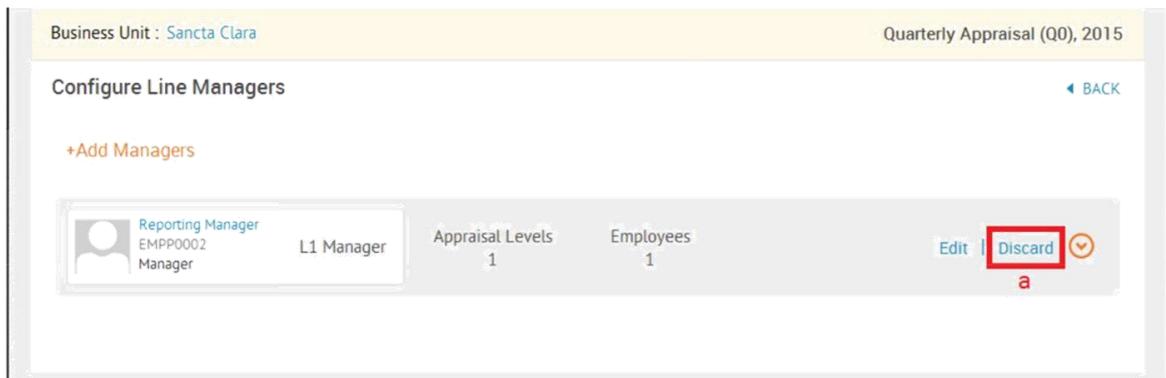


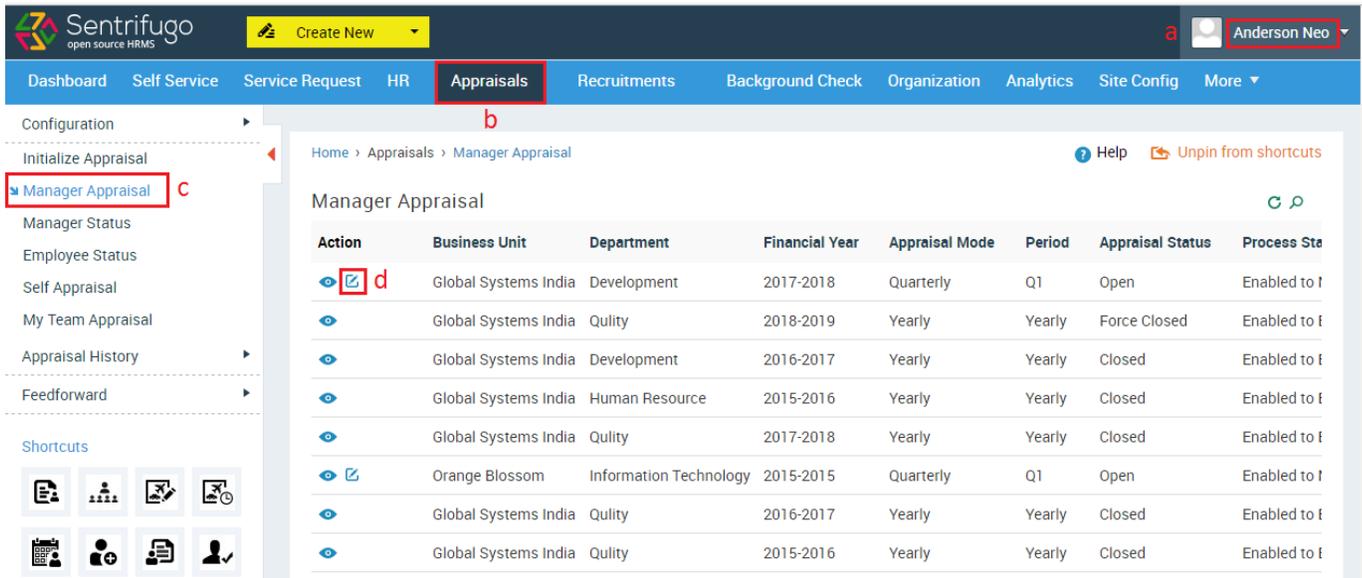
Figure 224

- 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 i	Questions	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings k <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings </div>
<input checked="" type="checkbox"/> h	<p>New Technologies/skills learn and implemented</p> <p>What are the new technologies/skills you explored and implemented?</p>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings j <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings </div>
<input checked="" type="checkbox"/>	<p>Responsibility</p> <p>Have you taken complete ownership of the task/project/product assigned to you?</p>	<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

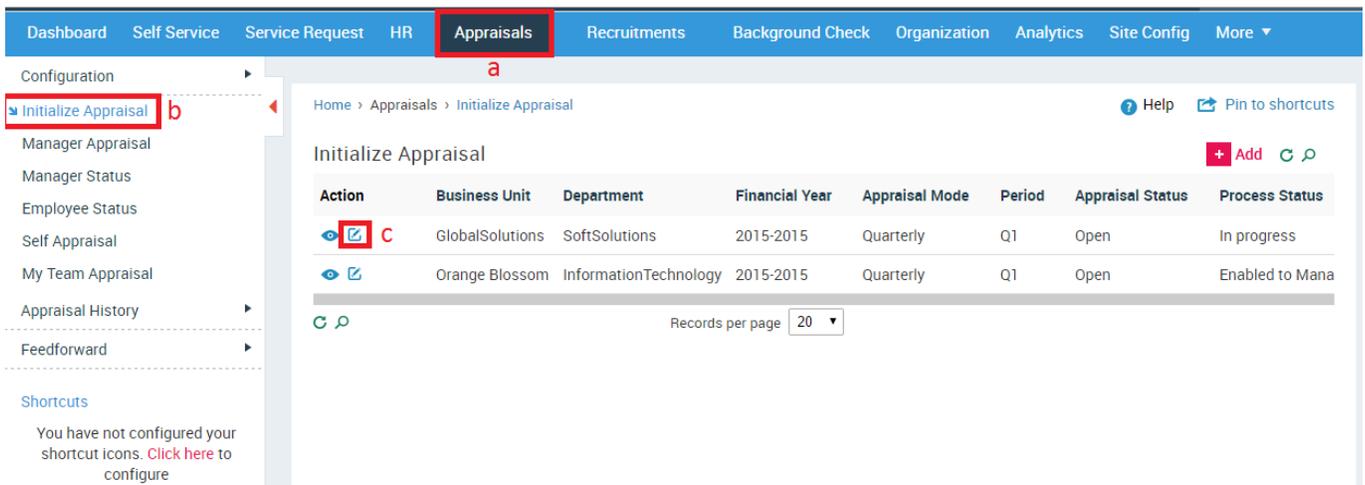
- k. Select Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
- l. Click **SAVE** button

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 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 '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 displays the 'Initialize Appraisal' page with a table of appraisal entries.

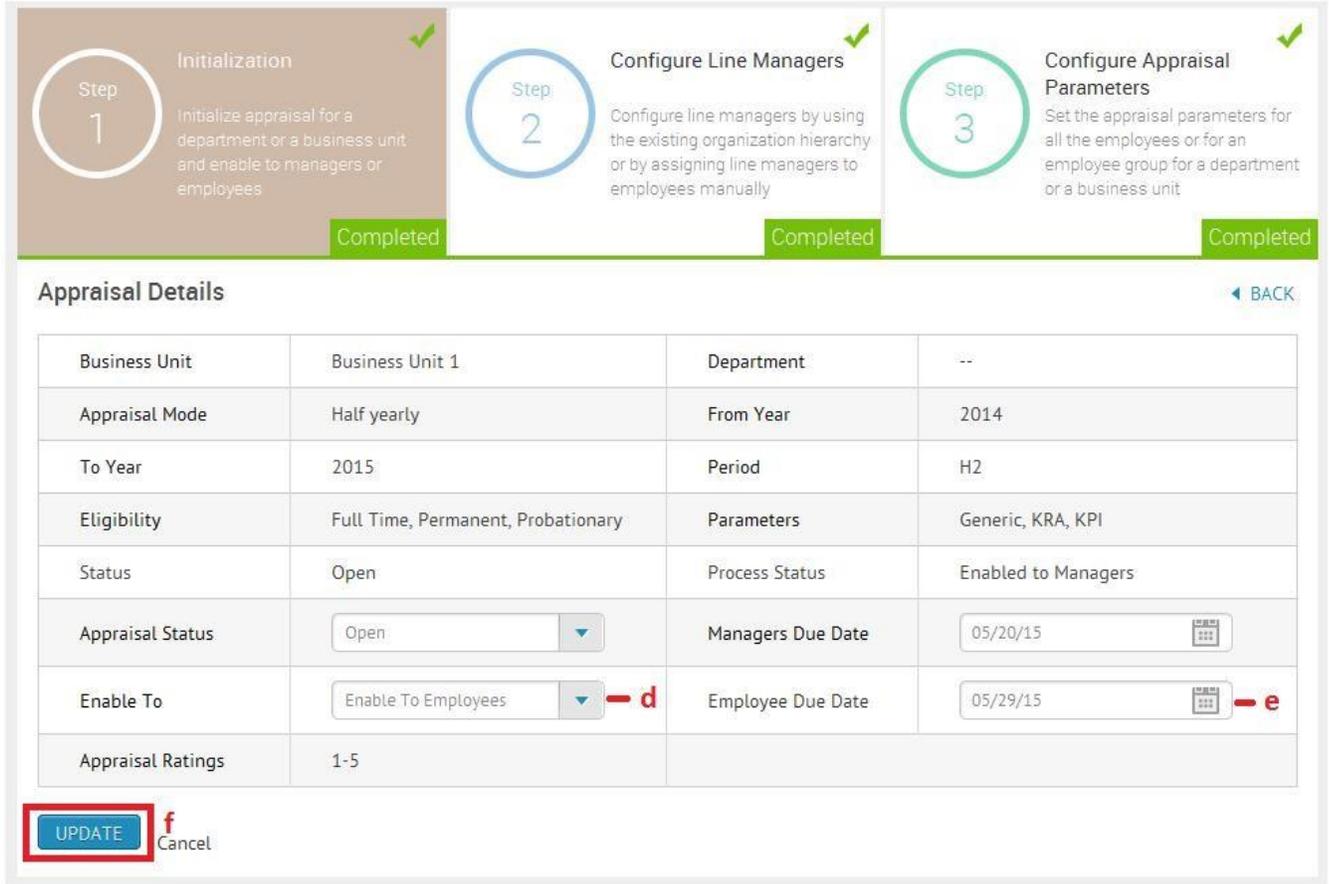
Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
C	GlobalSolutions	SoftSolutions	2015-2015	Quarterly	Q1	Open	In progress
	Orange Blossom	InformationTechnology	2015-2015	Quarterly	Q1	Open	Enabled to Mana

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, which includes a table of configuration parameters and a form with input fields and buttons.

Appraisal Details			
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	Employee Due Date	05/29/15
Appraisal Ratings	1-5		

At the bottom of the form, 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

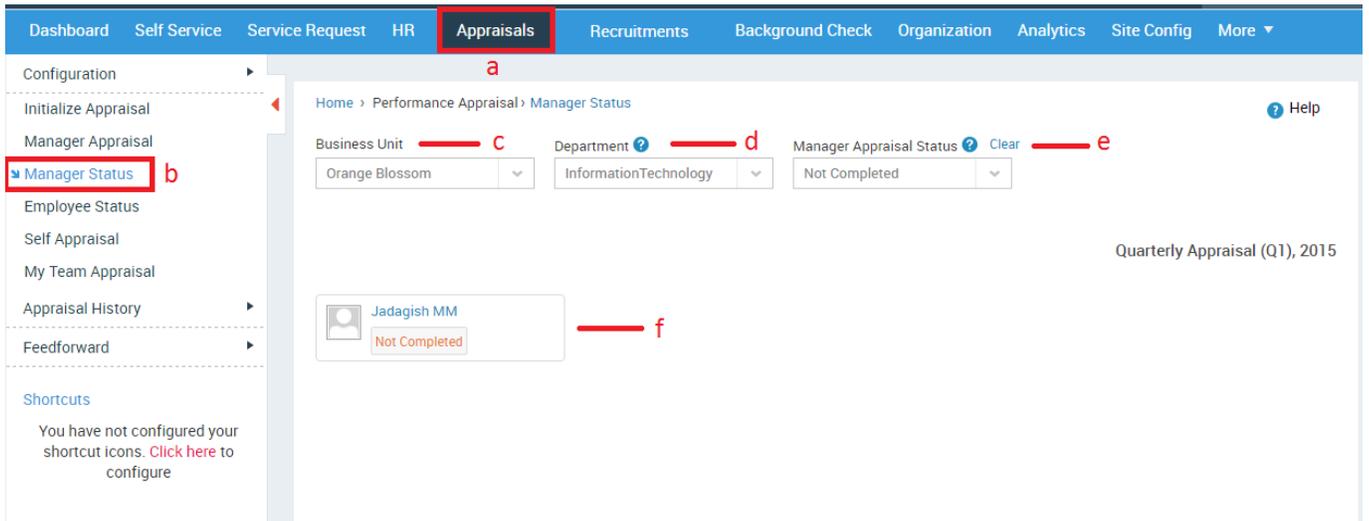


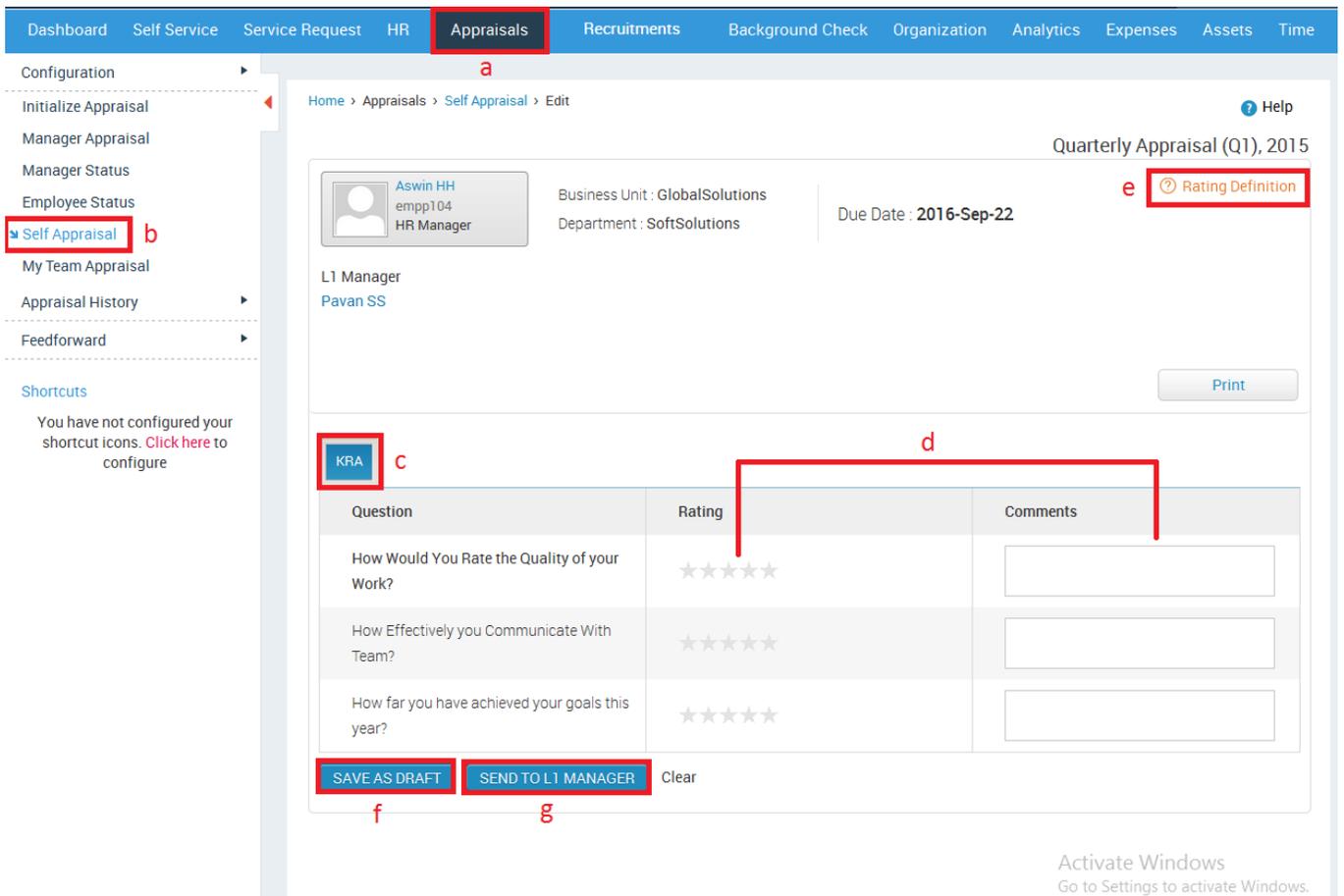
Figure 230

- 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
 My Team Appraisal
 Appraisal History
 Feedforward

Home > Appraisals > Self Appraisal > Edit

Help
 Quarterly Appraisal (Q1), 2015

Aswin HH
 emp104
 HR Manager

Business Unit : GlobalSolutions
 Department : SoftSolutions

Due Date : 2016-Sep-22

L1 Manager
 Pavan SS

Print

KRA

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 SEND TO L1 MANAGER Clear

Activate Windows
 Go to Settings to activate Windows.

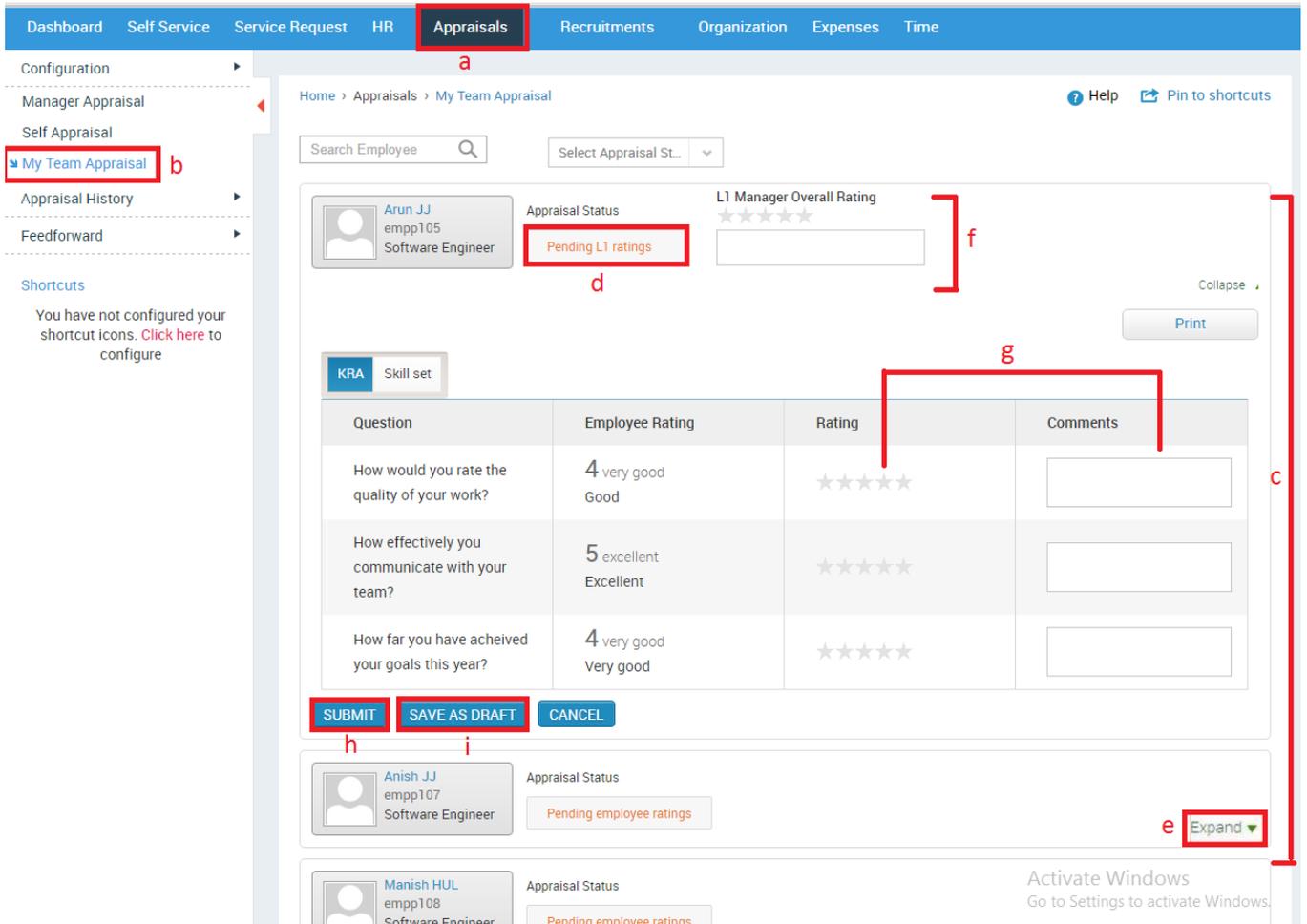
Figure 231

- 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 of this status is the 'L1 Manager Overall Rating' section (labeled 'f'), which includes a star rating and a text input field. Below this is a table with columns for 'Question', 'Employee Rating', 'Rating', and 'Comments'. The table contains three rows of questions with corresponding ratings and comment input fields (labeled 'g'). At the bottom of the table are three buttons: 'SUBMIT' (labeled 'h'), 'SAVE AS DRAFT' (labeled 'i'), and 'CANCEL'. Below the table, the next employee, Anish JJ (emp107), is shown with a 'Pending employee ratings' status (labeled 'e'). An 'Expand' button (labeled 'e') is visible next to the status. A 'Print' button is also present in the top right of the main content area. The page also includes a search bar, a breadcrumb trail, and a 'Help' link.

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 233

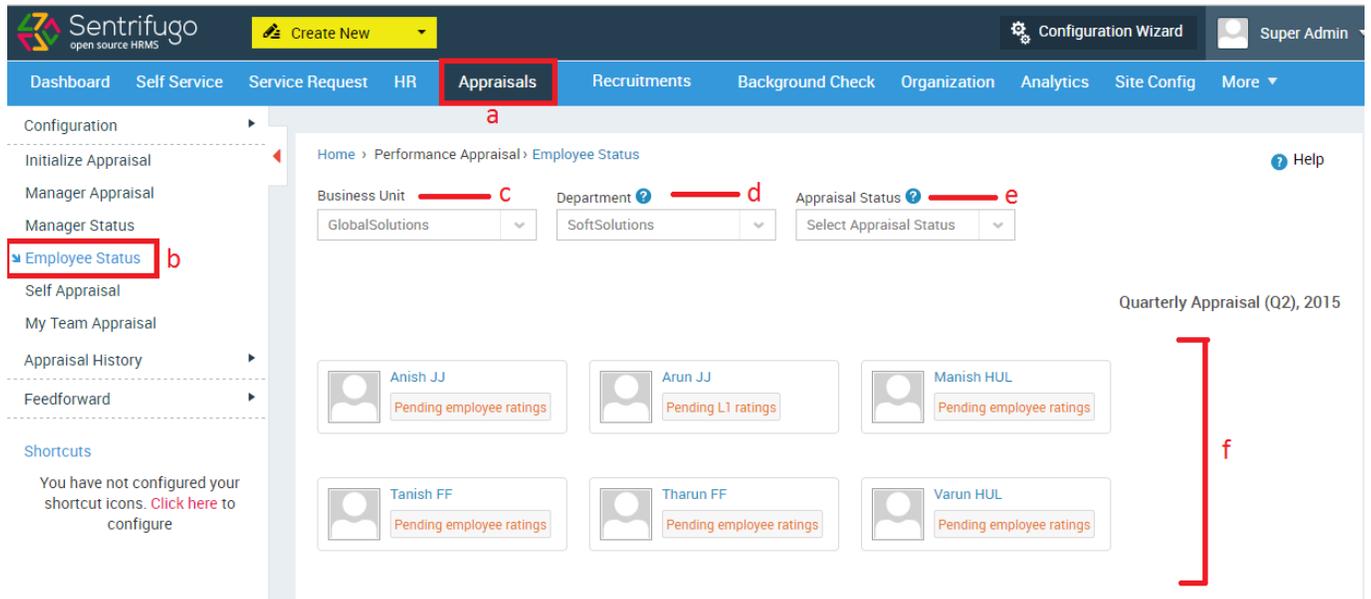


Figure 233

- 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

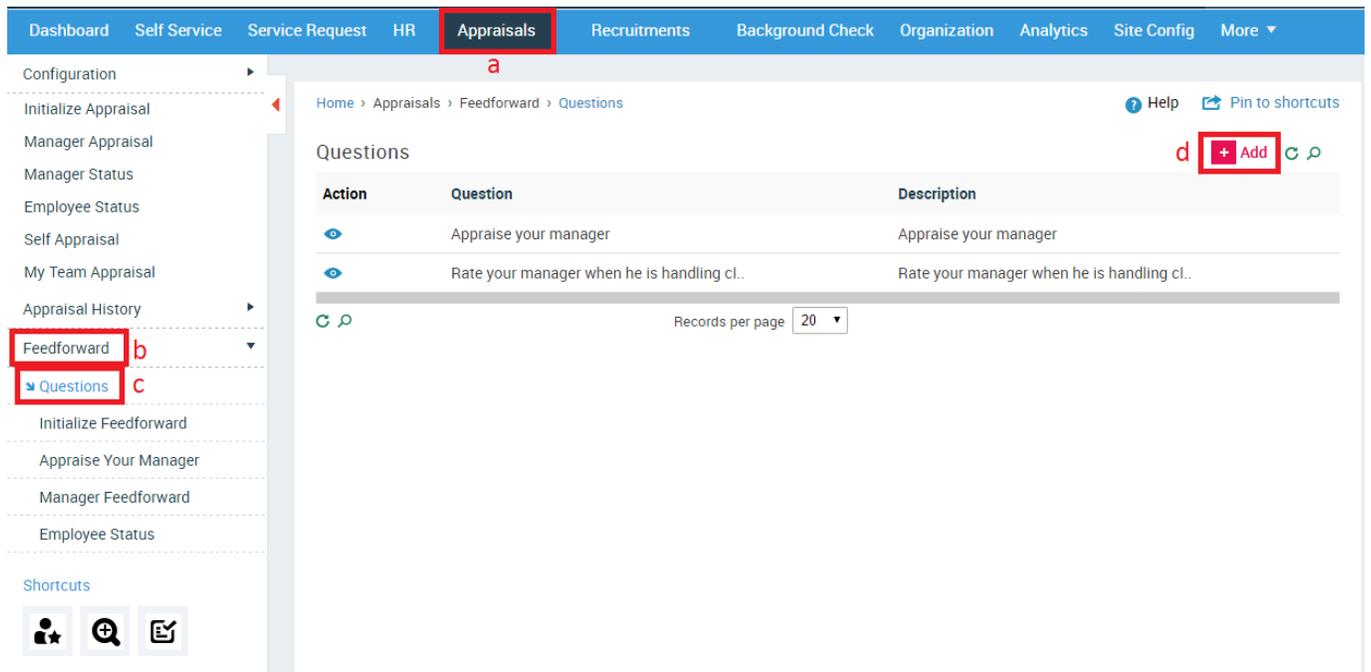


Figure 234

- Click **Appraisals** in the top menu
- Click **Feedforward** on the left menu panel
- Click **Questions** in the submenu
- Click **+Add** button

Please refer Figure 235

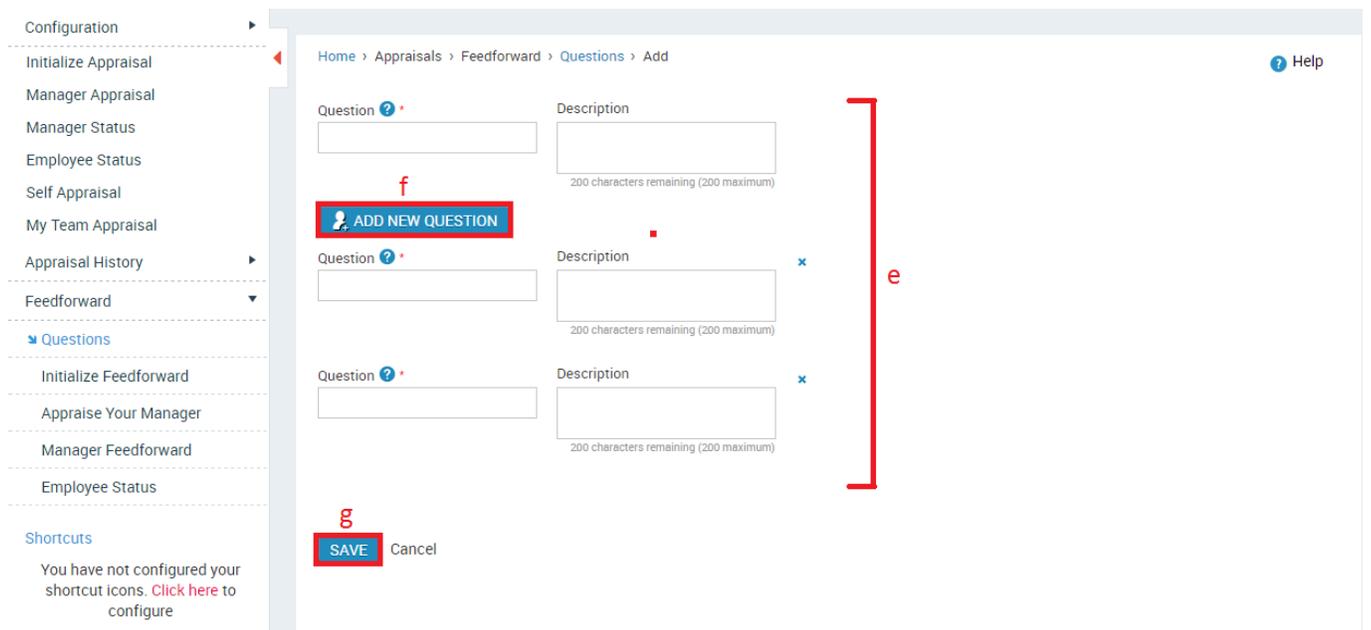


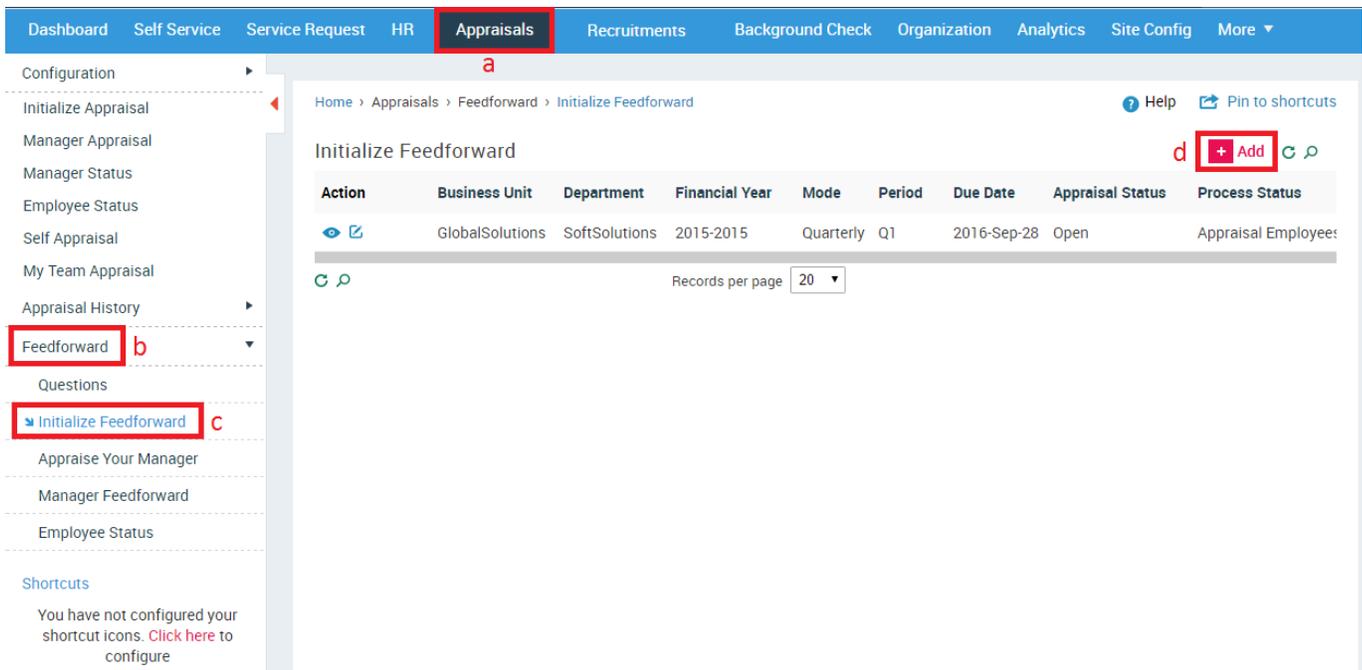
Figure 235

- 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 236



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Appraisals' (a). The left sidebar has 'Feedforward' (b) and 'Initialize Feedforward' (c) highlighted. The main content area shows the 'Initialize Feedforward' page with a '+ Add' button (d) and a table with the following data:

Action	Business Unit	Department	Financial Year	Mode	Period	Due Date	Appraisal Status	Process Status
 	GlobalSolutions	SoftSolutions	2015-2015	Quarterly	Q1	2016-Sep-28	Open	Appraisal Employees

Figure 236

- 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 237

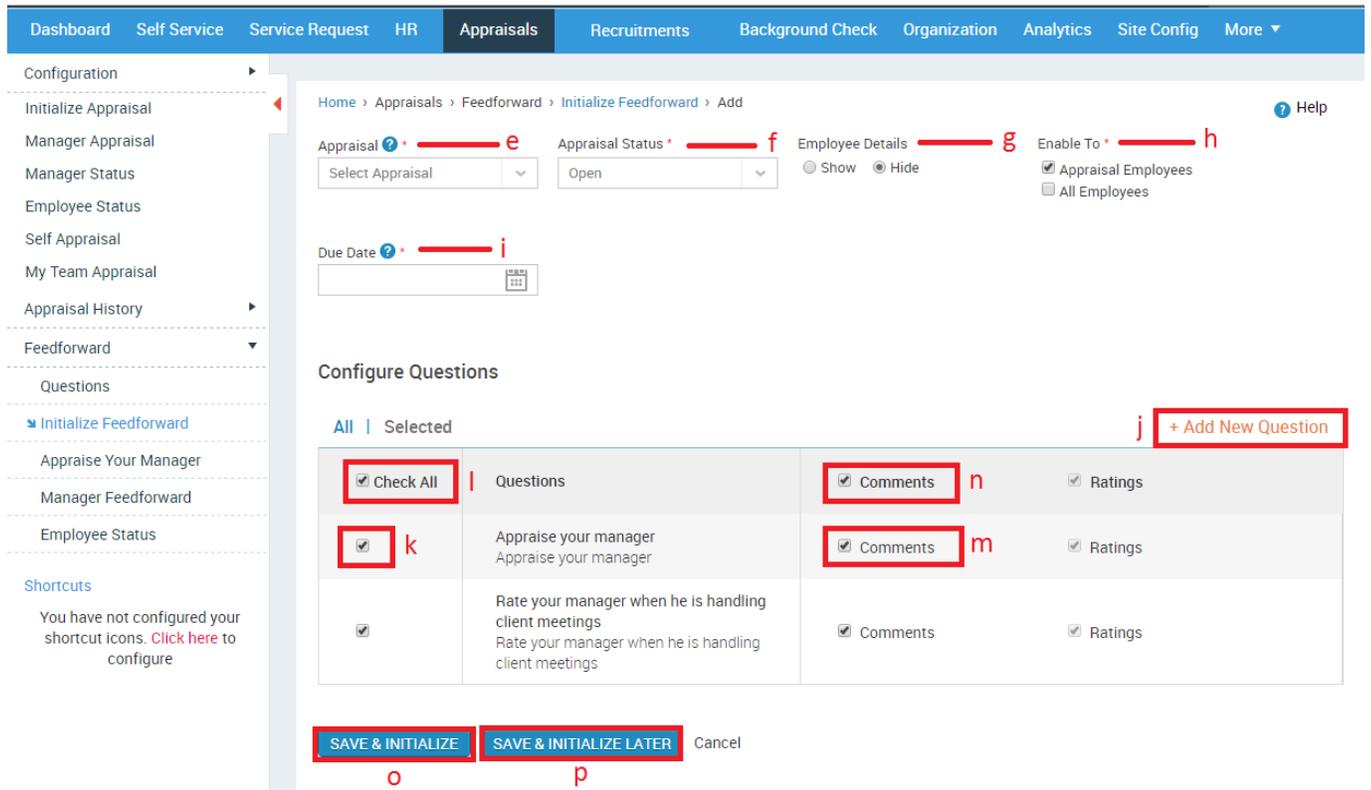


Figure 237

- 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

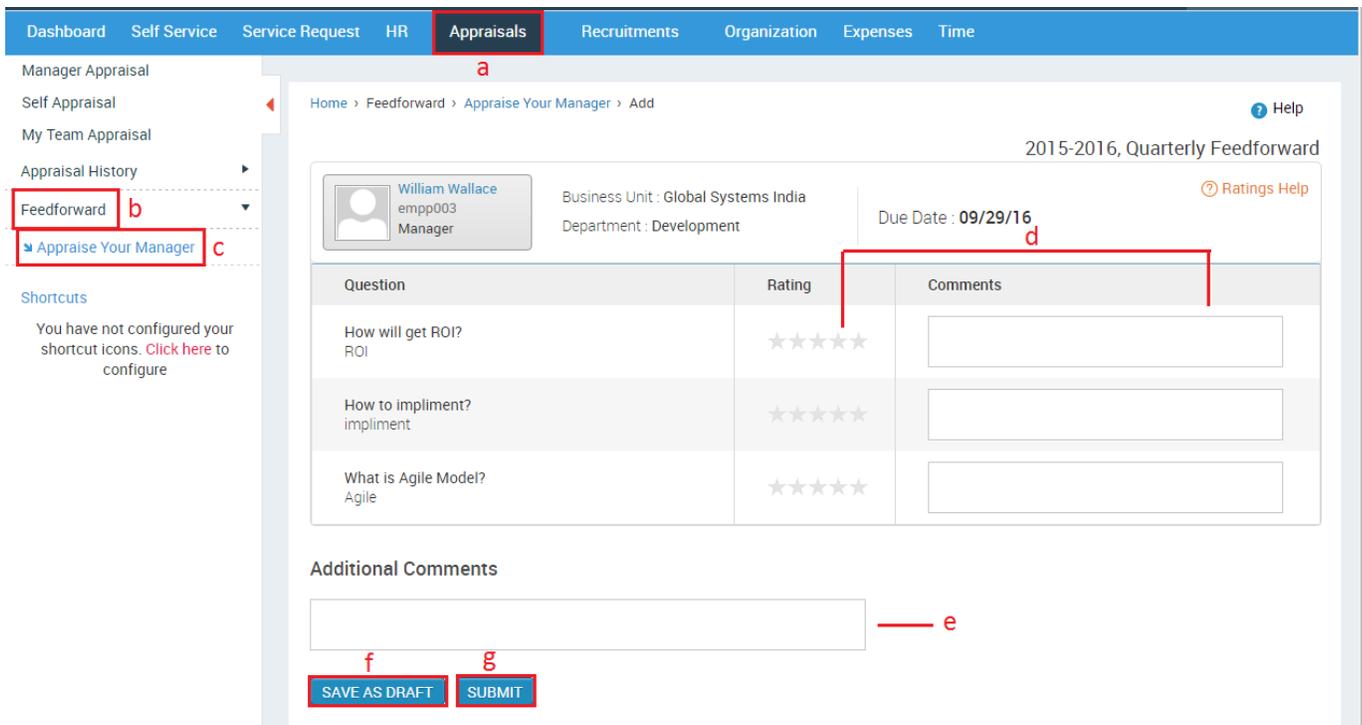
Or

- 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 238



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 lists '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'.

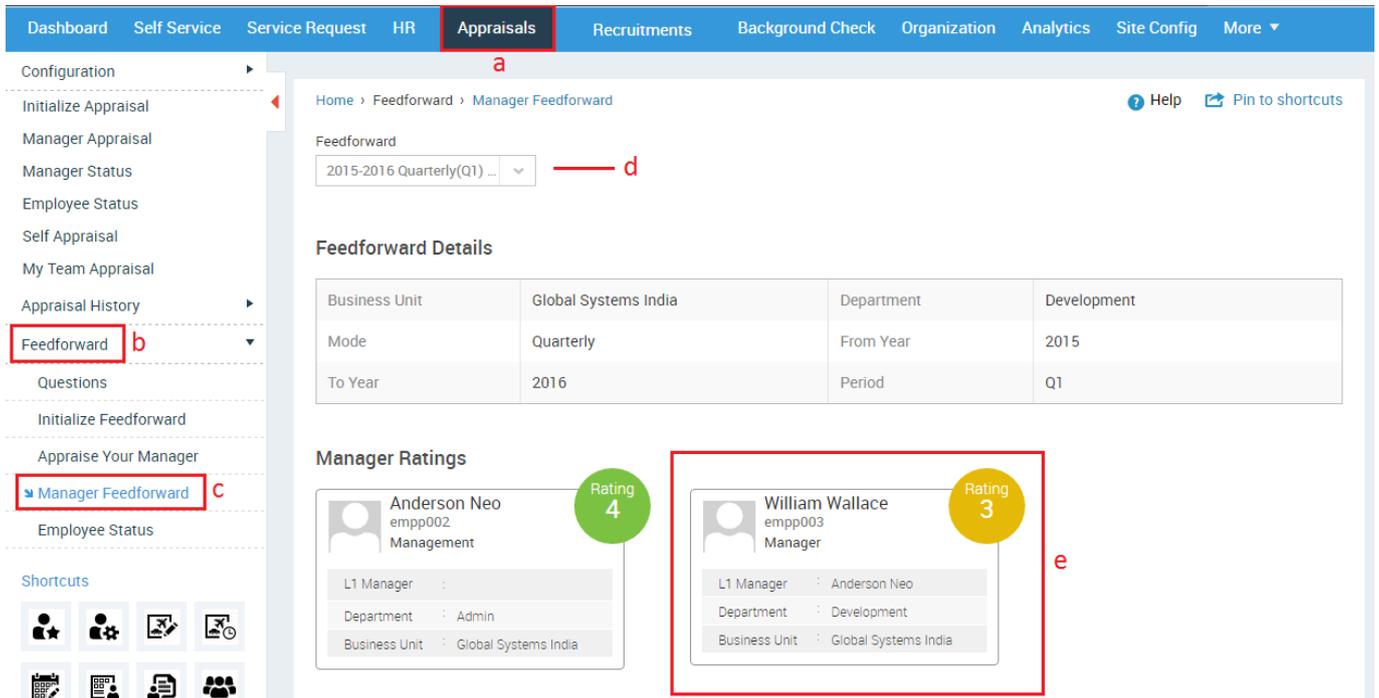
Figure 238

- 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 239



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

Configuration

Initialize Appraisal

Manager Appraisal

Manager Status

Employee Status

Self Appraisal

My Team Appraisal

Appraisal History

Feedforward b

Questions

Initialize Feedforward

Appraise Your Manager

Manager Feedforward c

Employee Status

Shortcuts

Home > Feedforward > Manager Feedforward

Feedforward

2015-2016 Quarterly(Q1) ... d

Feedforward Details

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

Manager Ratings

Anderson Neo
empp002
Management

Rating 4

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

William Wallace
empp003
Manager

Rating 3

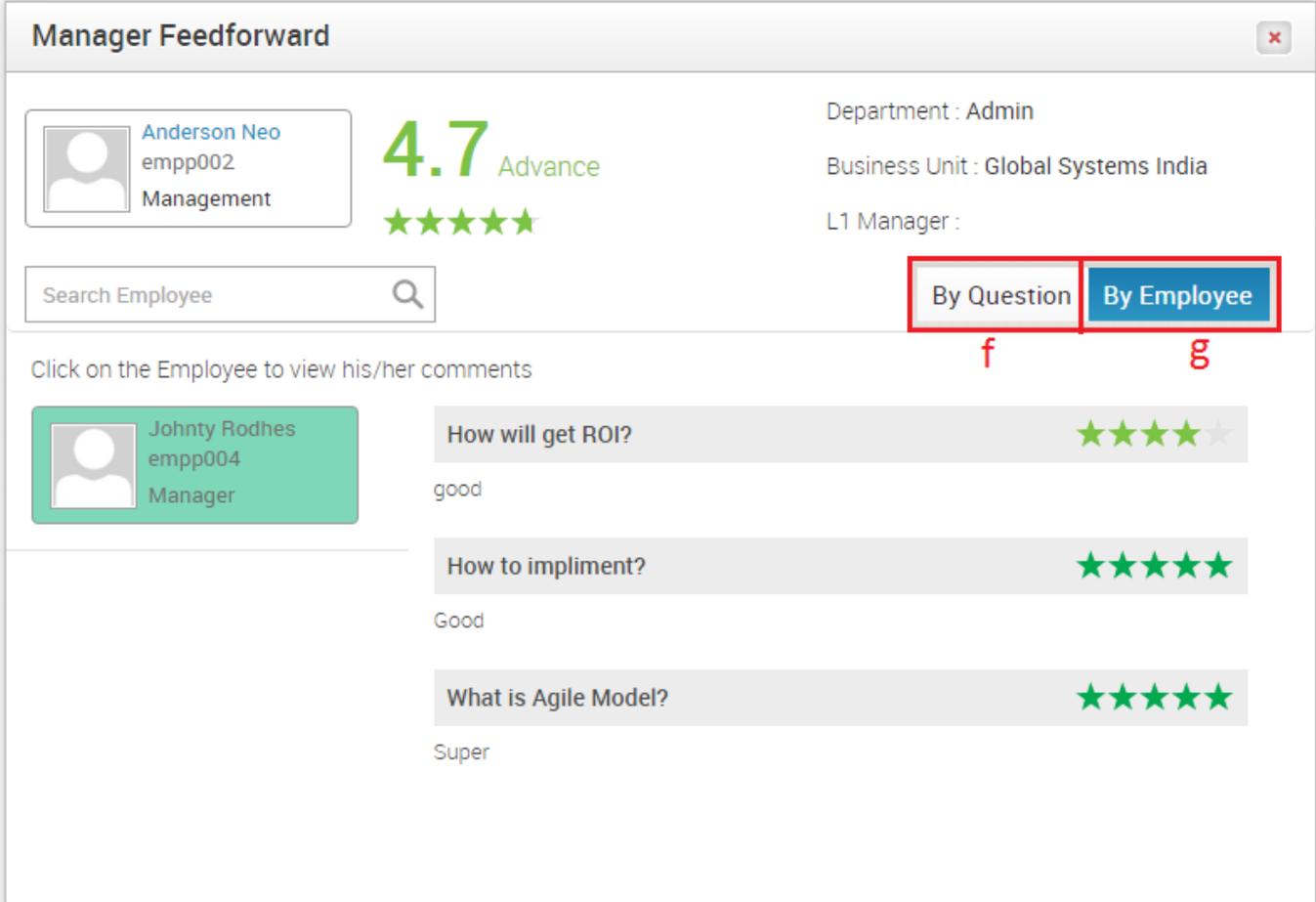
L1 Manager : Anderson Neo
Department : Development
Business Unit : Global Systems India

e

Figure 239

- 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 240



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 240

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 241

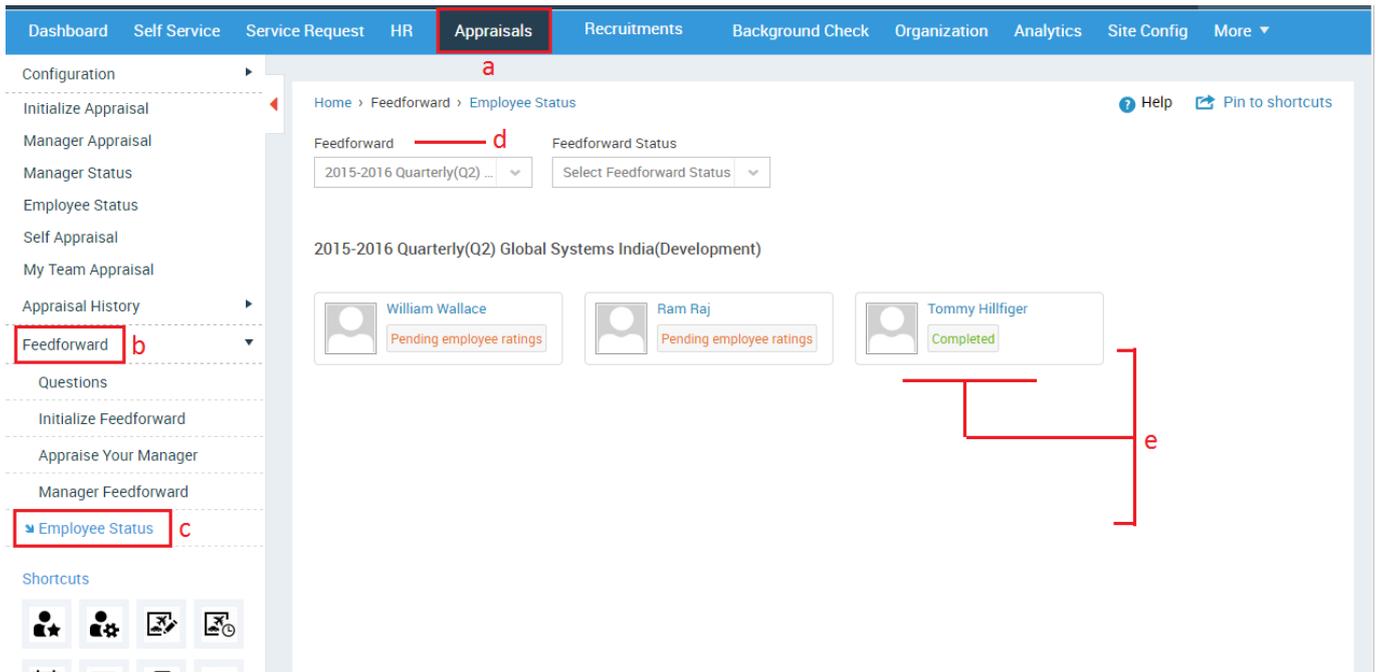


Figure 241

- 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 242

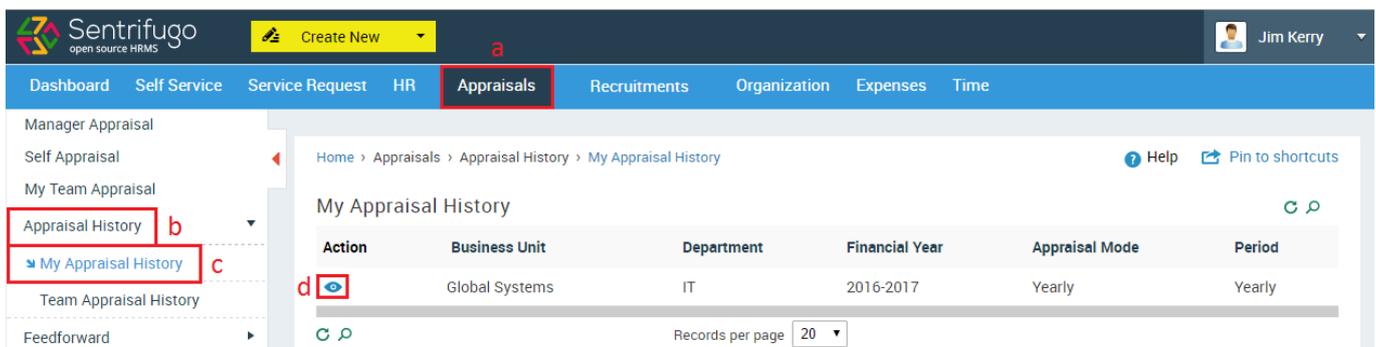
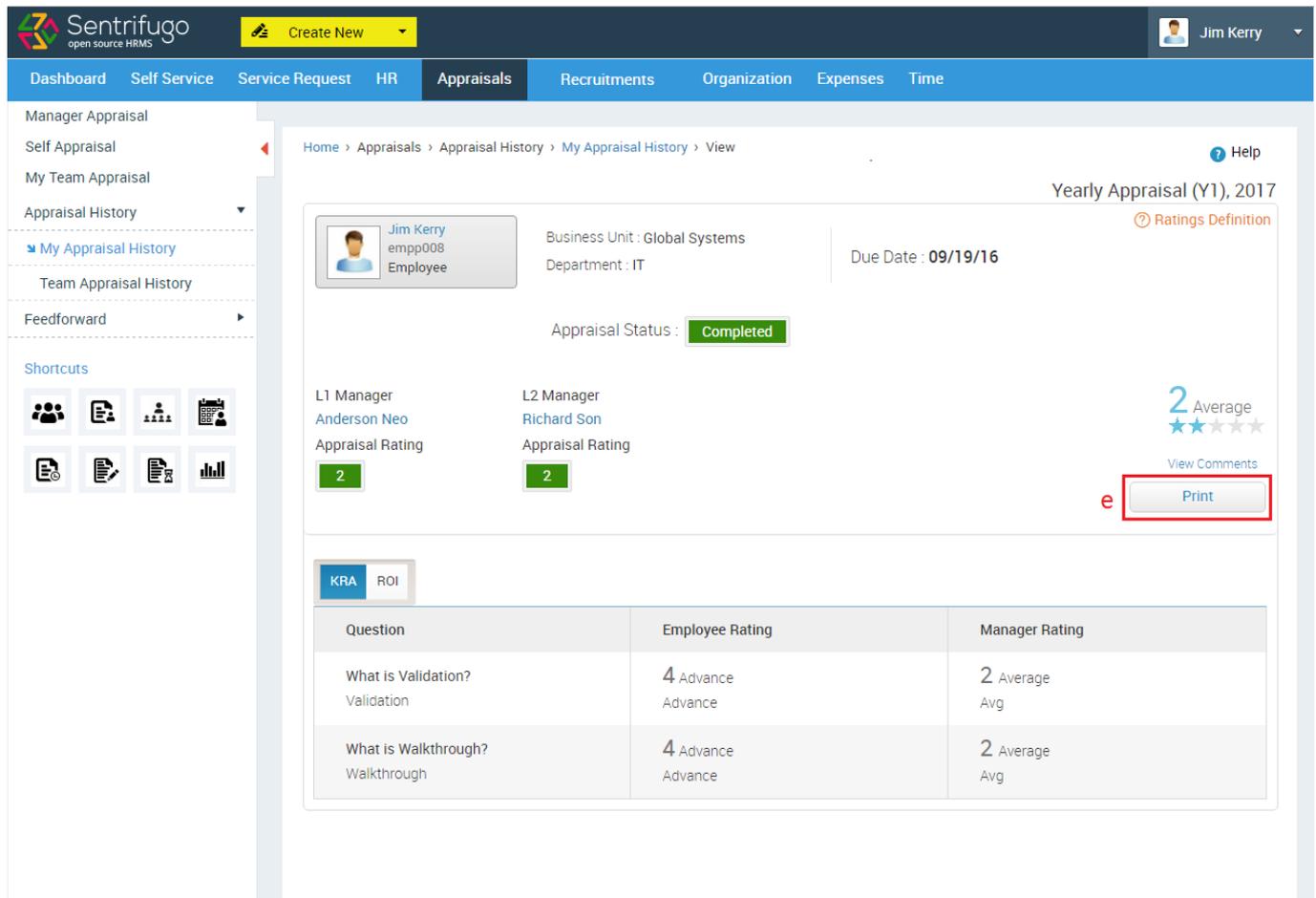


Figure 242

- 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 243



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 243

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 244

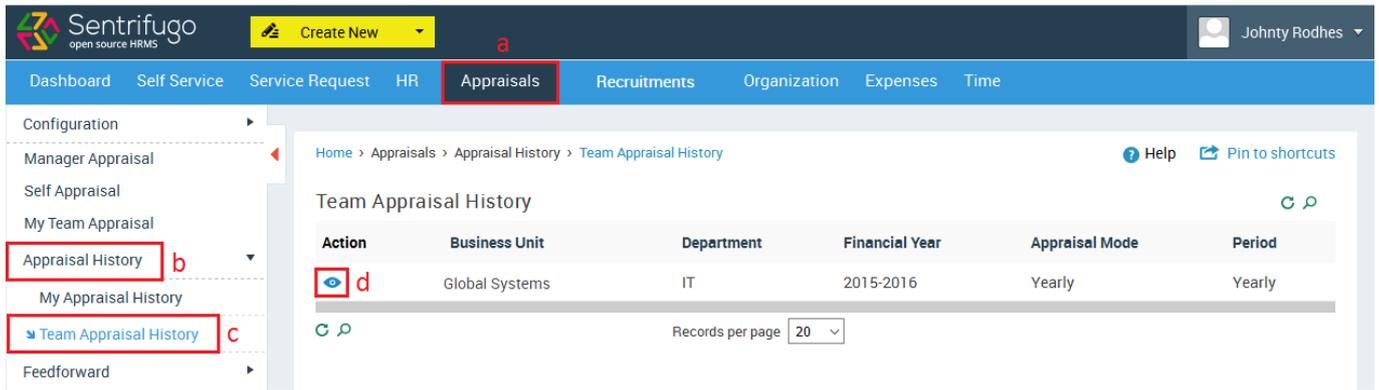


Figure 244

- 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 245

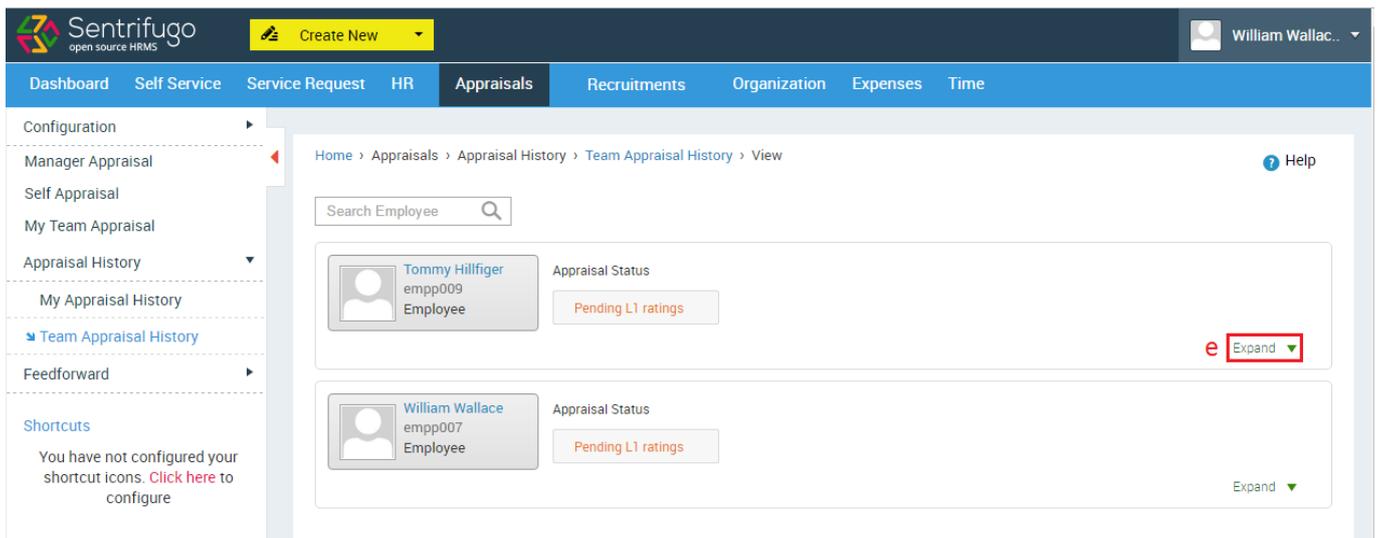
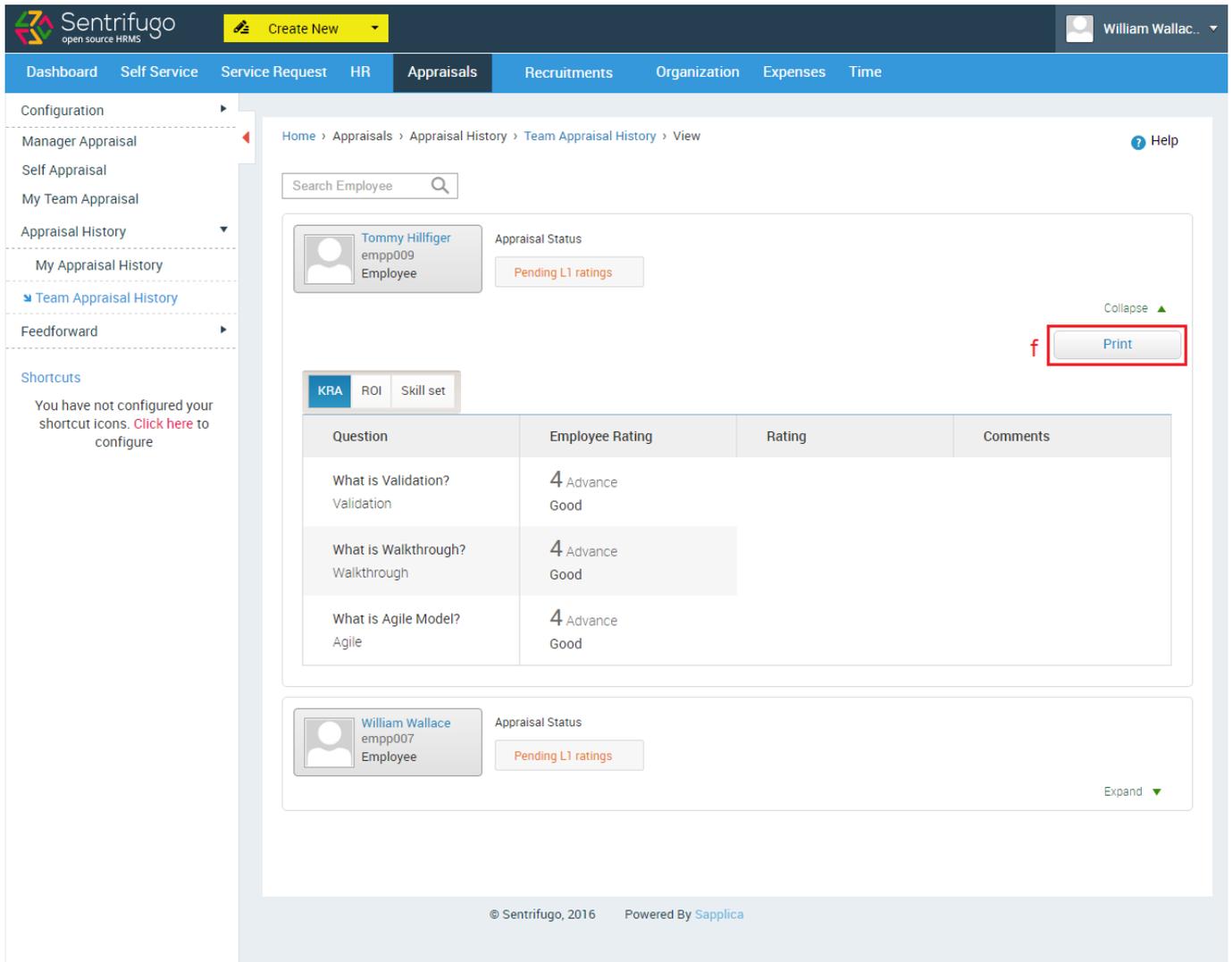


Figure 245

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

Please refer Figure 246



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

Search Employee


Tommy Hillfiger
 empp009
 Employee

Appraisal Status: Pending L1 ratings

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

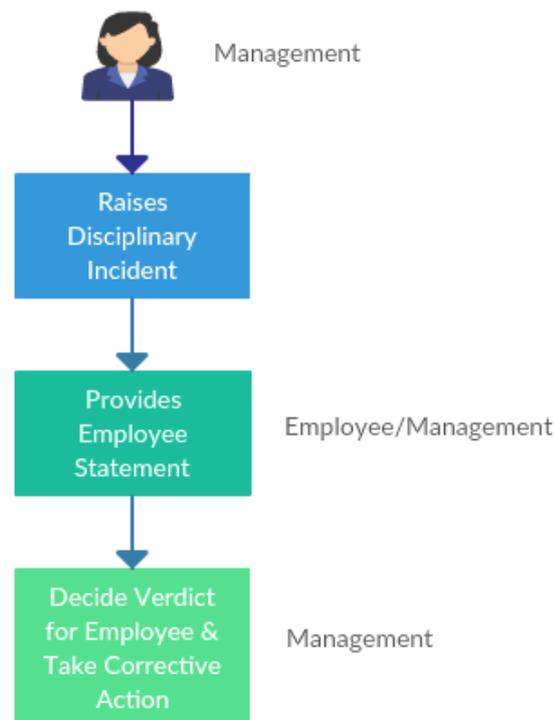
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Figure 246

- 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 Description:

- User (Management) 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

17.1 How do I create a Violation Type?



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

Please refer Figure 247

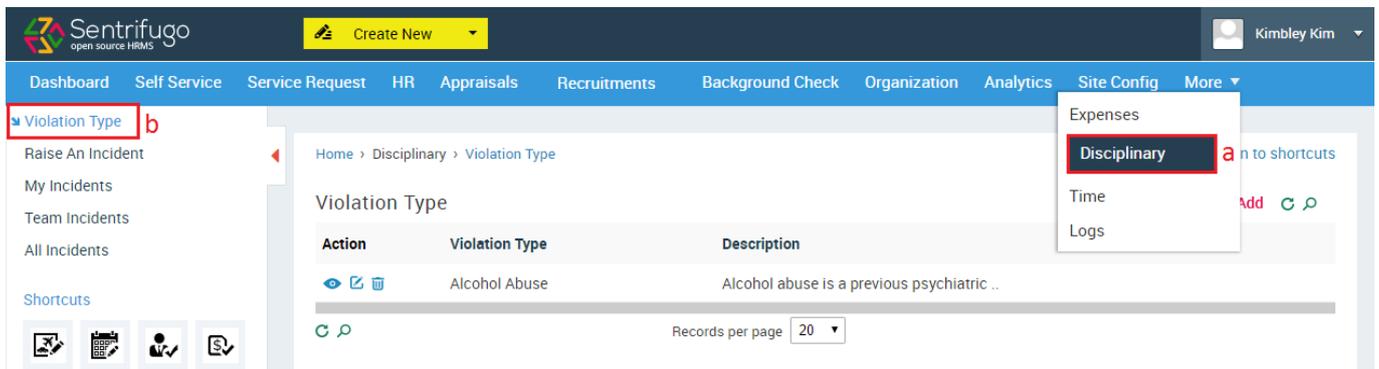


Figure 247

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

Please refer Figure 248

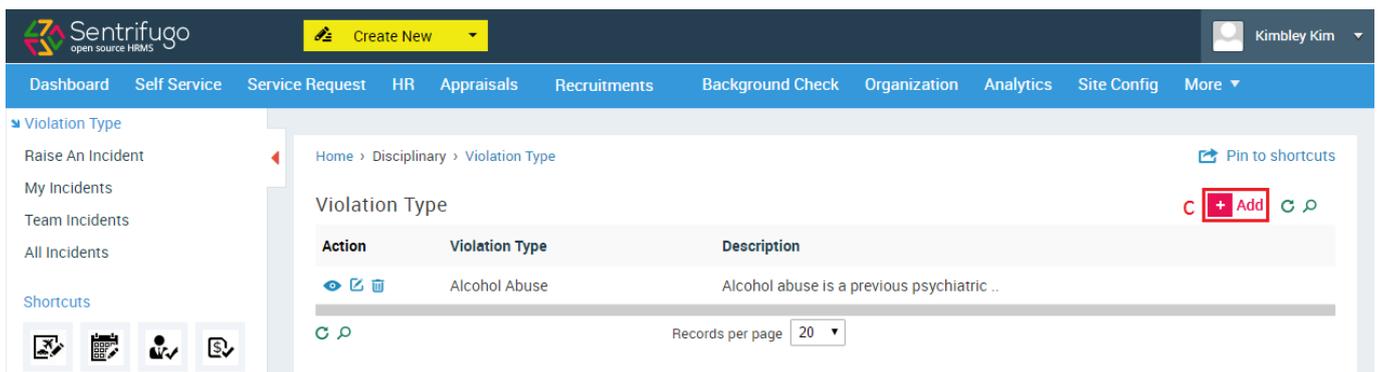


Figure 248

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

Please refer Figure 249

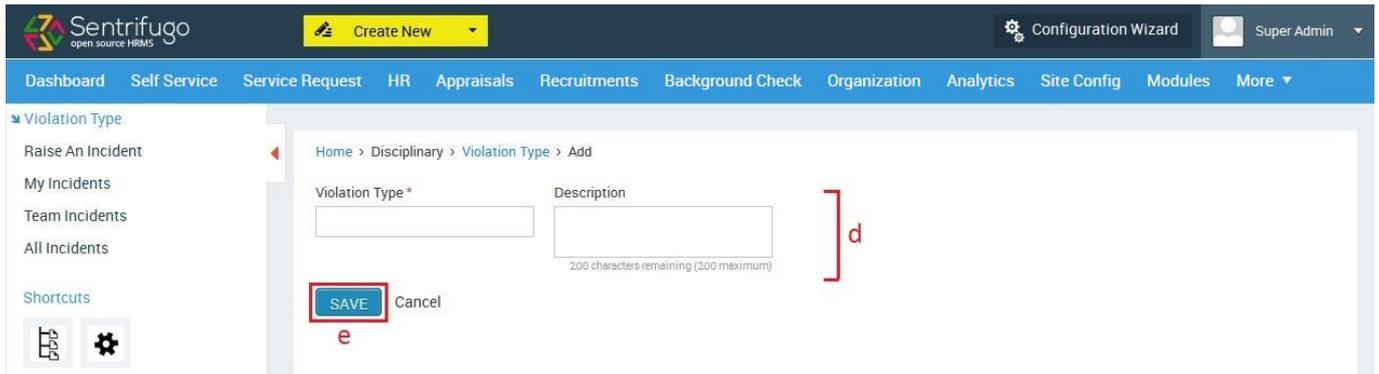


Figure 249

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

17.2 How do I raise a disciplinary incident?

Please refer Figure 250

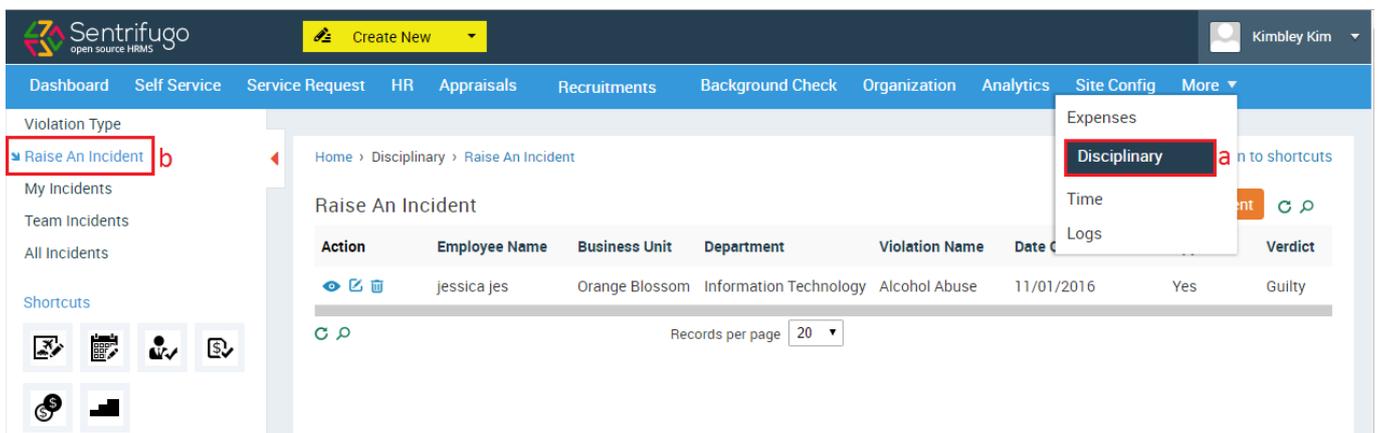


Figure 250

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

Please refer Figure 251

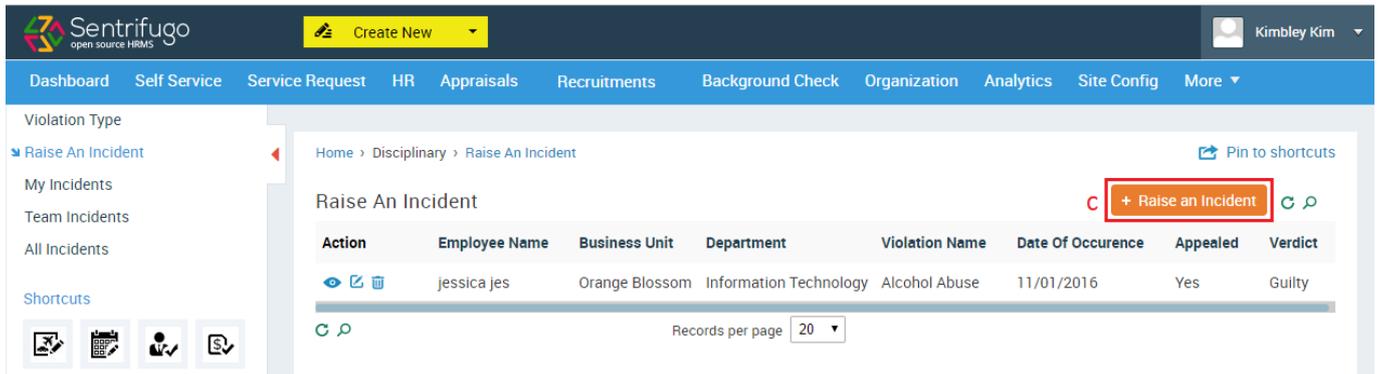


Figure 251

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

Please refer Figure 252

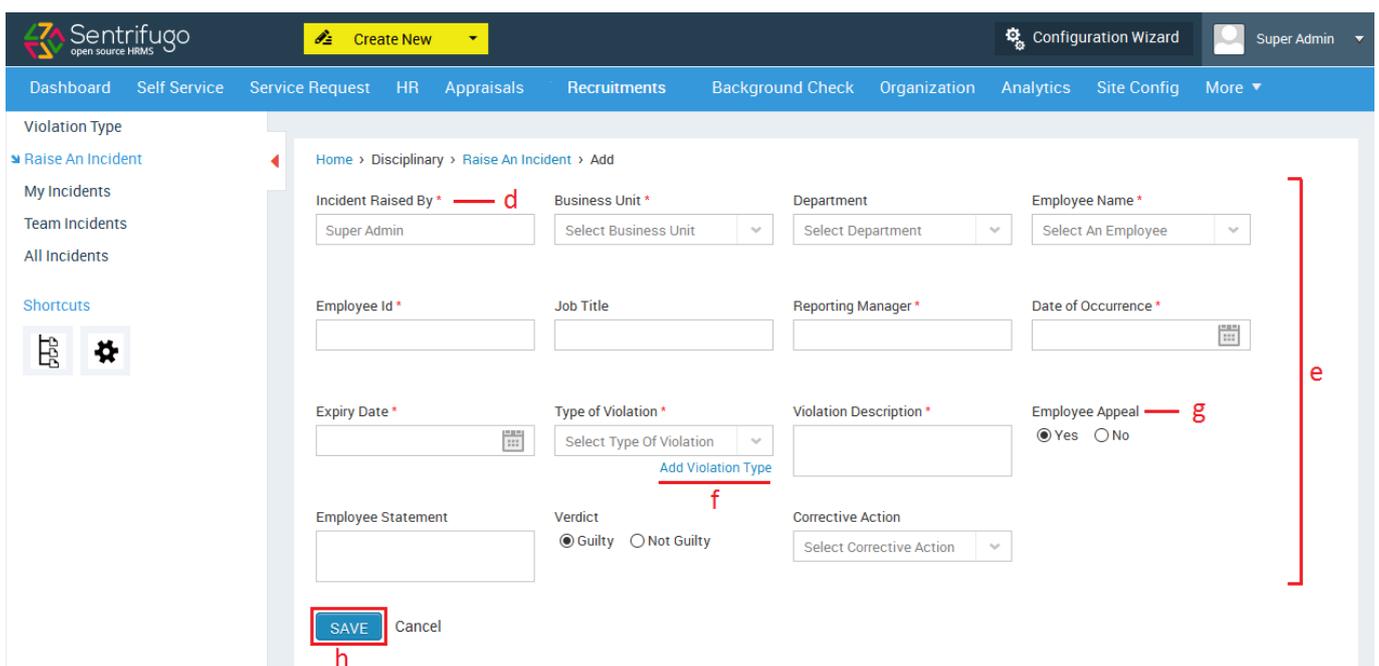
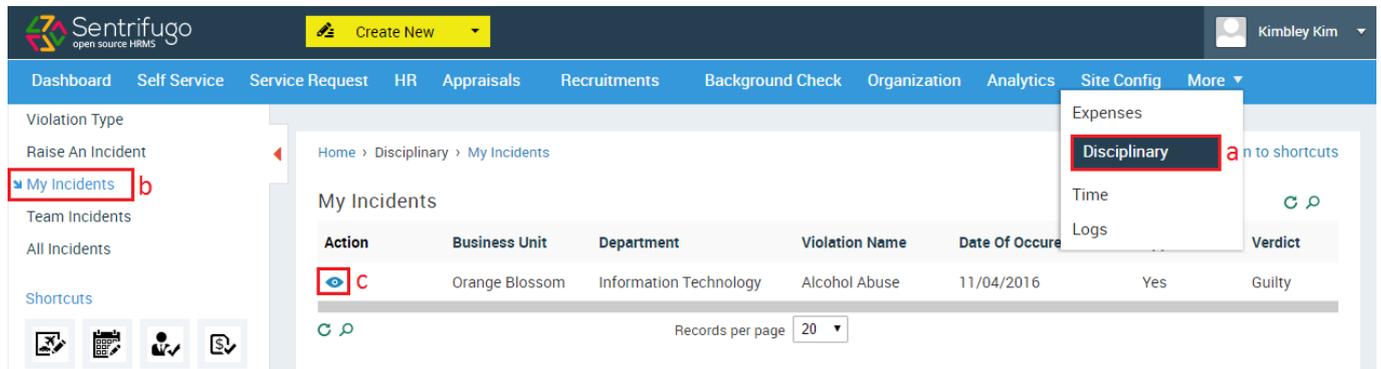


Figure 252

- 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 253



Home > Disciplinary > My Incidents

My Incidents

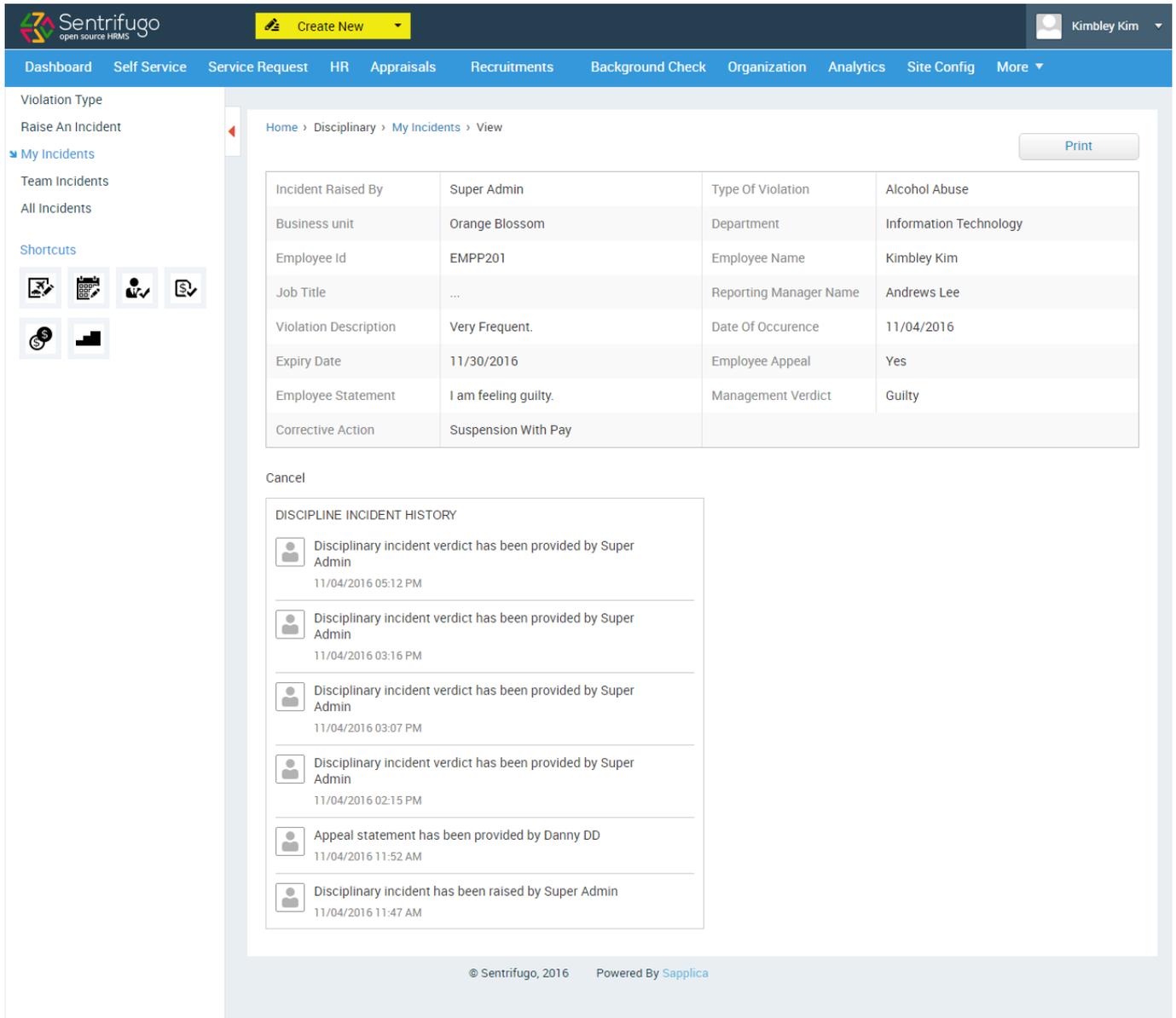
Action	Business Unit	Department	Violation Name	Date Of Occurrence	Verdict
 c	Orange Blossom	Information Technology	Alcohol Abuse	11/04/2016	Yes Guilty

Records per page: 20

Figure 253

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

Please refer Figure 254



Violation Type
 Raise An Incident
 My Incidents
 Team Incidents
 All Incidents
 Shortcuts

Home > Disciplinary > My Incidents > View 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 254

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

Please refer Figure 255

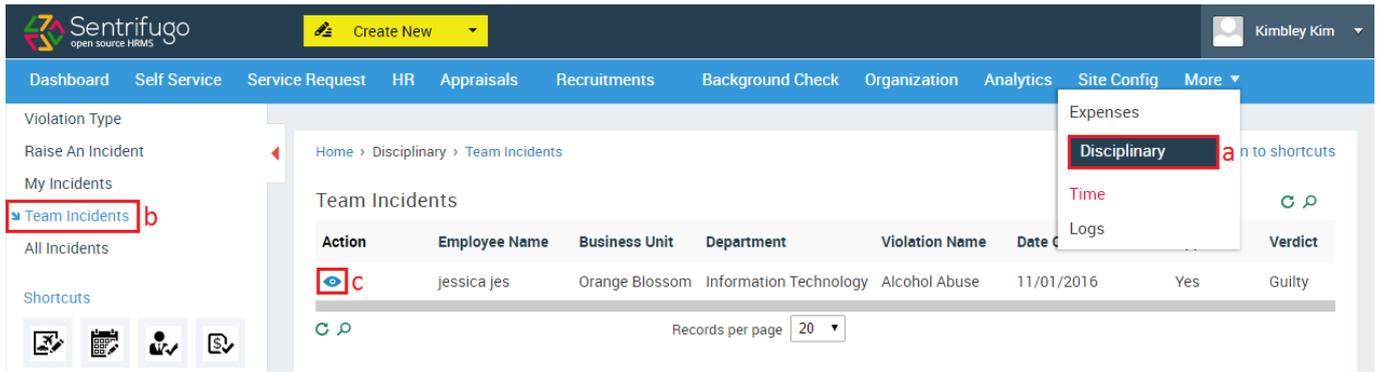


Figure 255

- 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 256

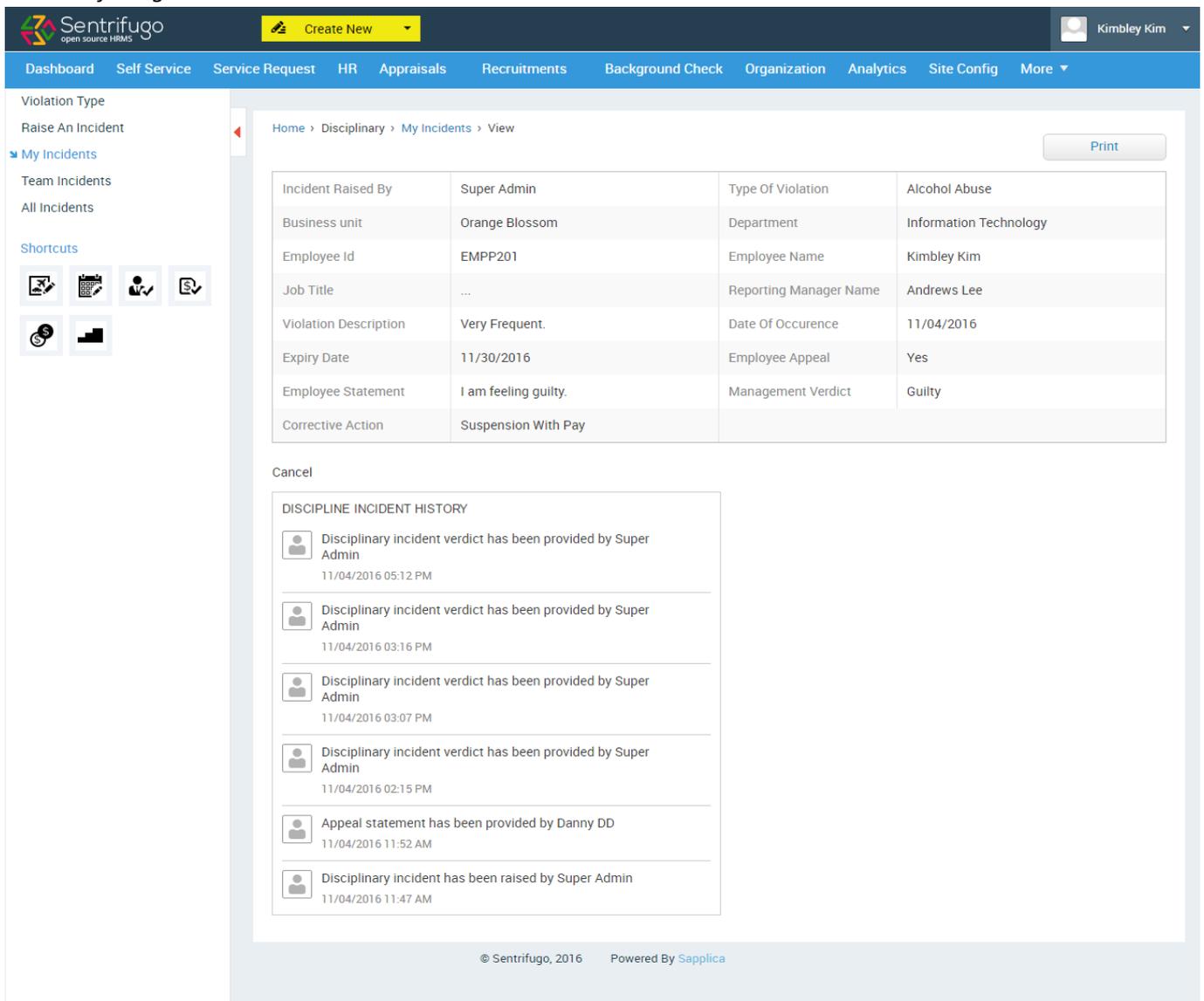


Figure 256

17.5 How do I provide my appeal statement?

Please refer Figure 257

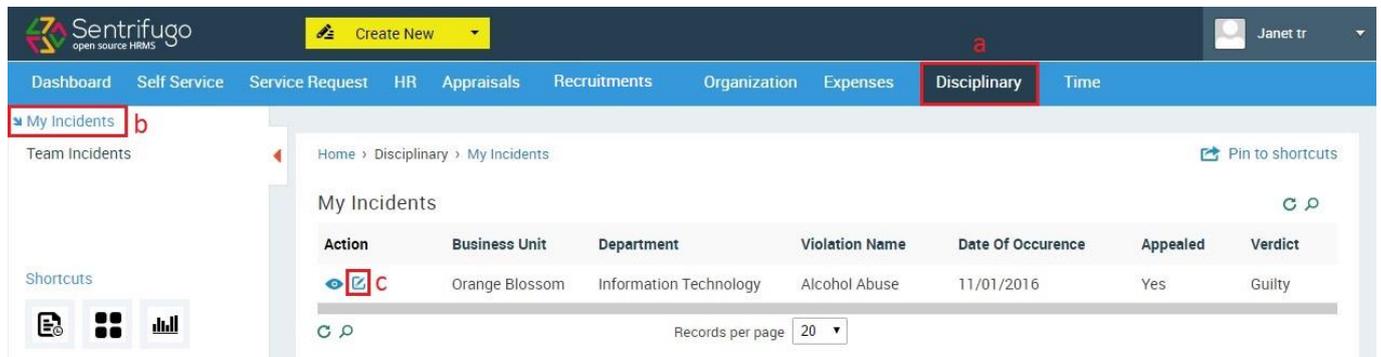


Figure 257

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

Please refer Figure 258

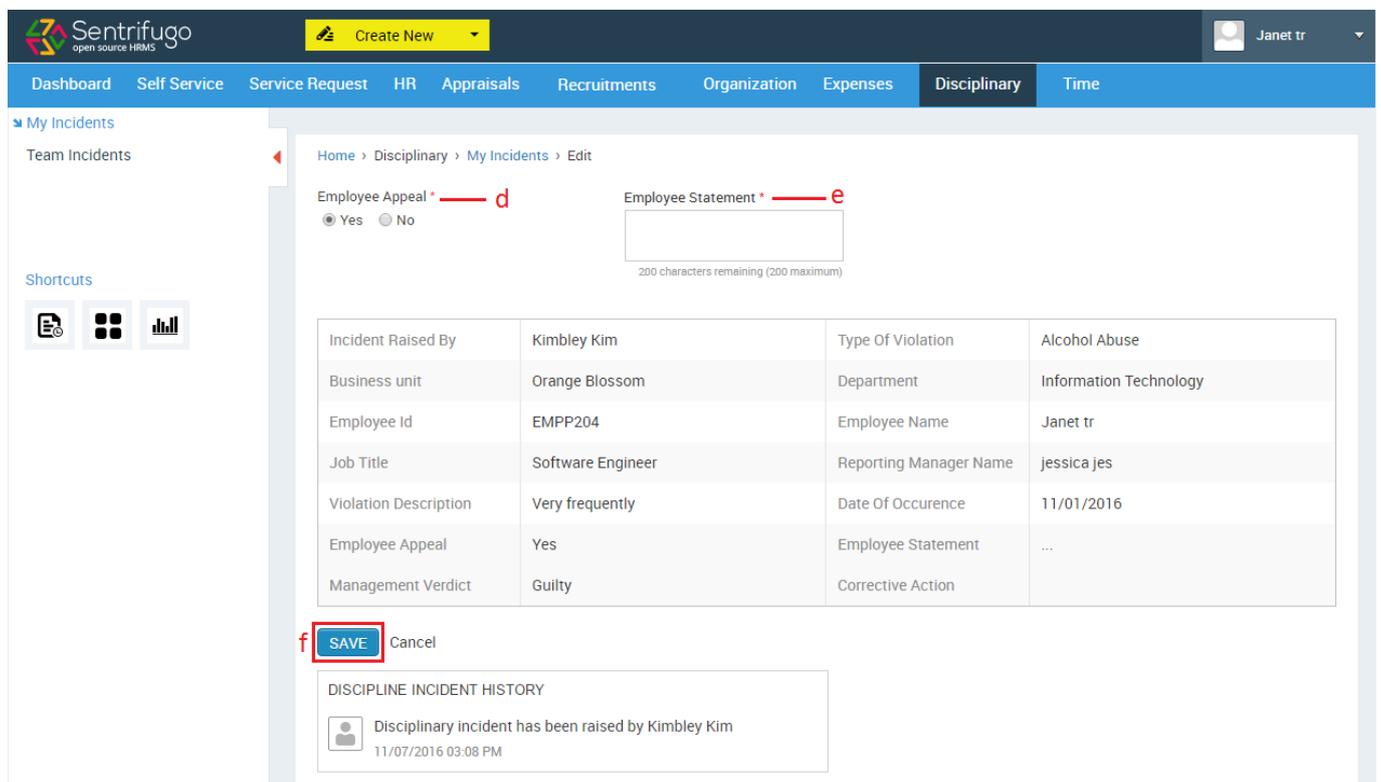


Figure 258

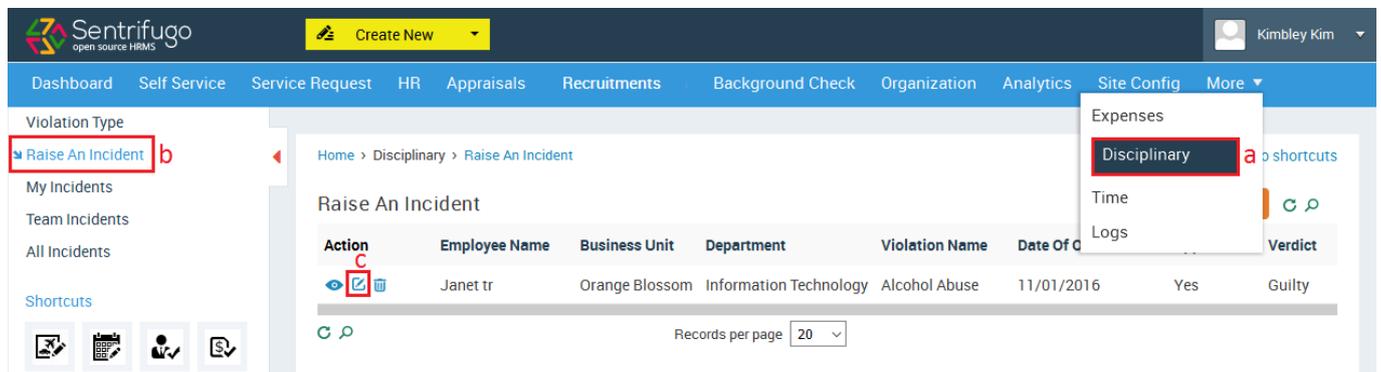
- d. Select **Yes** if you want to appeal and **No** if you don't want to appeal
- e. Provide your statement in the **Employee Statements** textbox
- f. Click **SAVE** button

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 259



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 'Kimbley Kim' is logged in. The left sidebar shows 'Violation Type' with 'Raise An Incident' highlighted (labeled 'b'). The main content area shows the 'Raise An Incident' page with a table of incidents. The 'Action' column for the first incident has an 'Edit' icon highlighted (labeled 'c'). A dropdown menu is open over the 'Disciplinary' menu item, which is highlighted (labeled 'a').

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

Figure 259

- 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 260

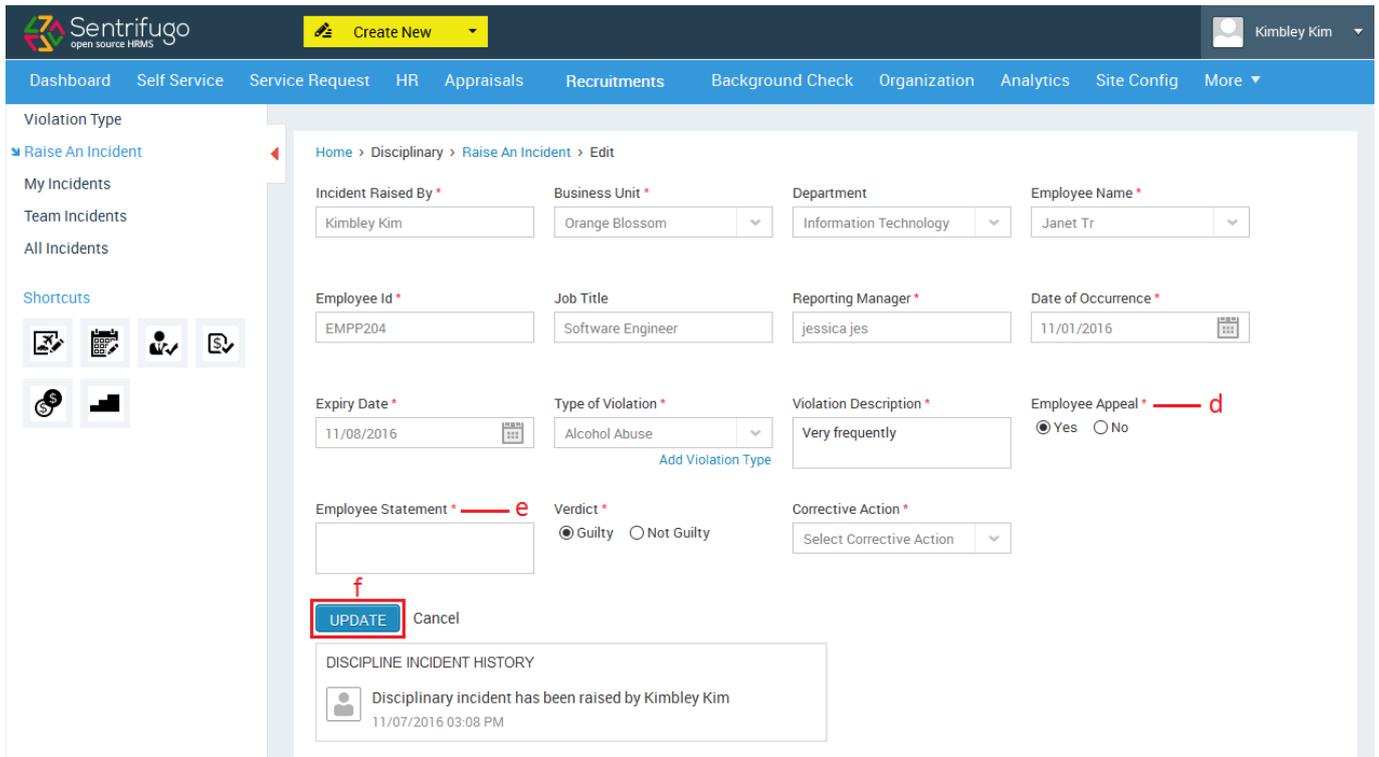


Figure 260

- 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 261

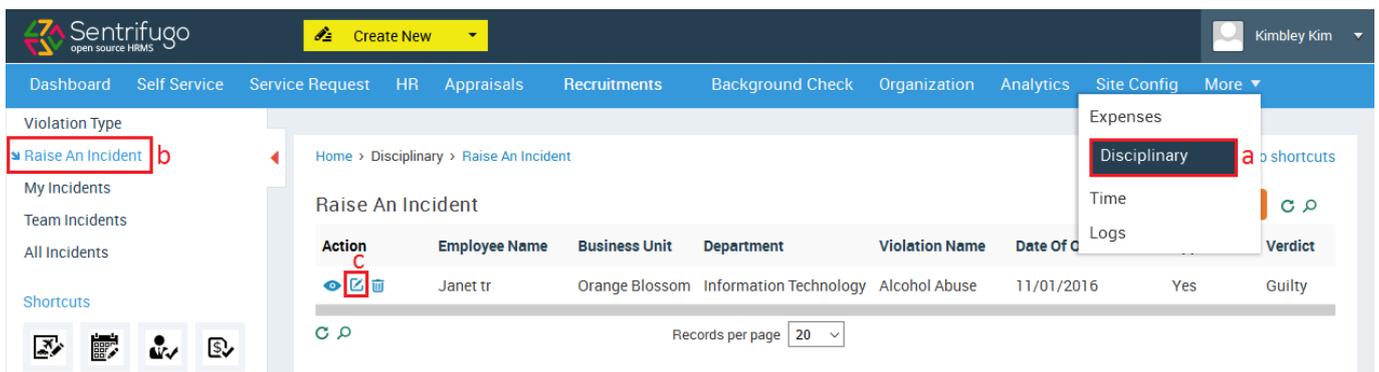


Figure 261

- 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 262

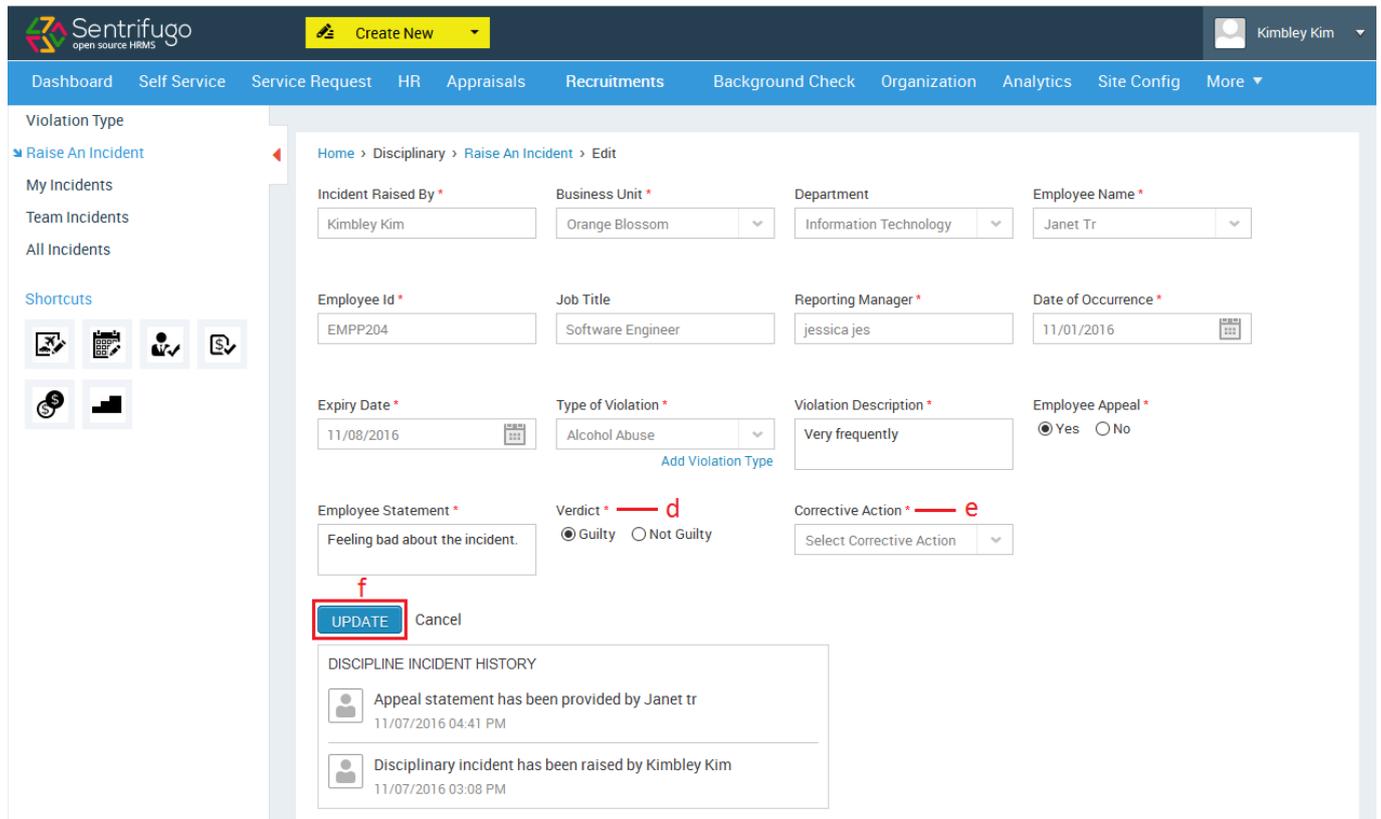
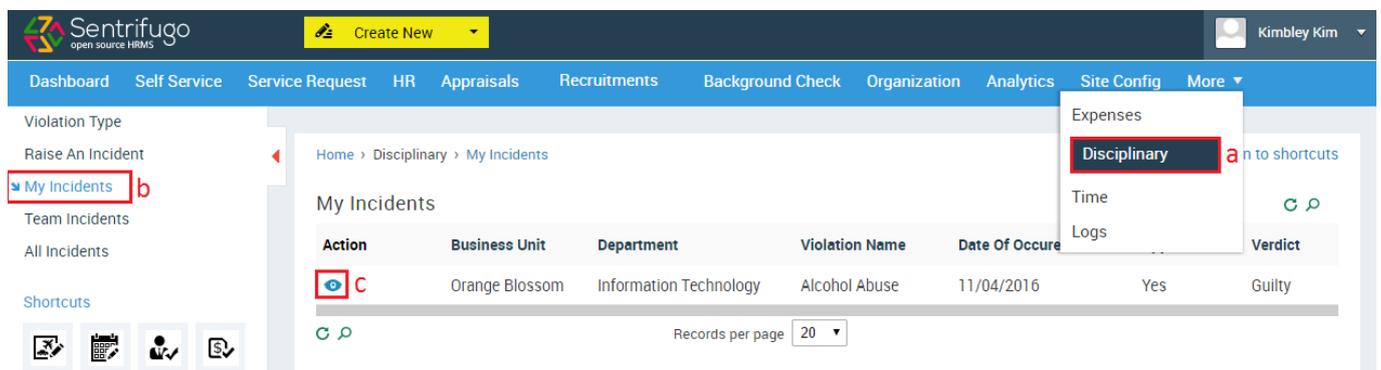


Figure 262

- 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 263

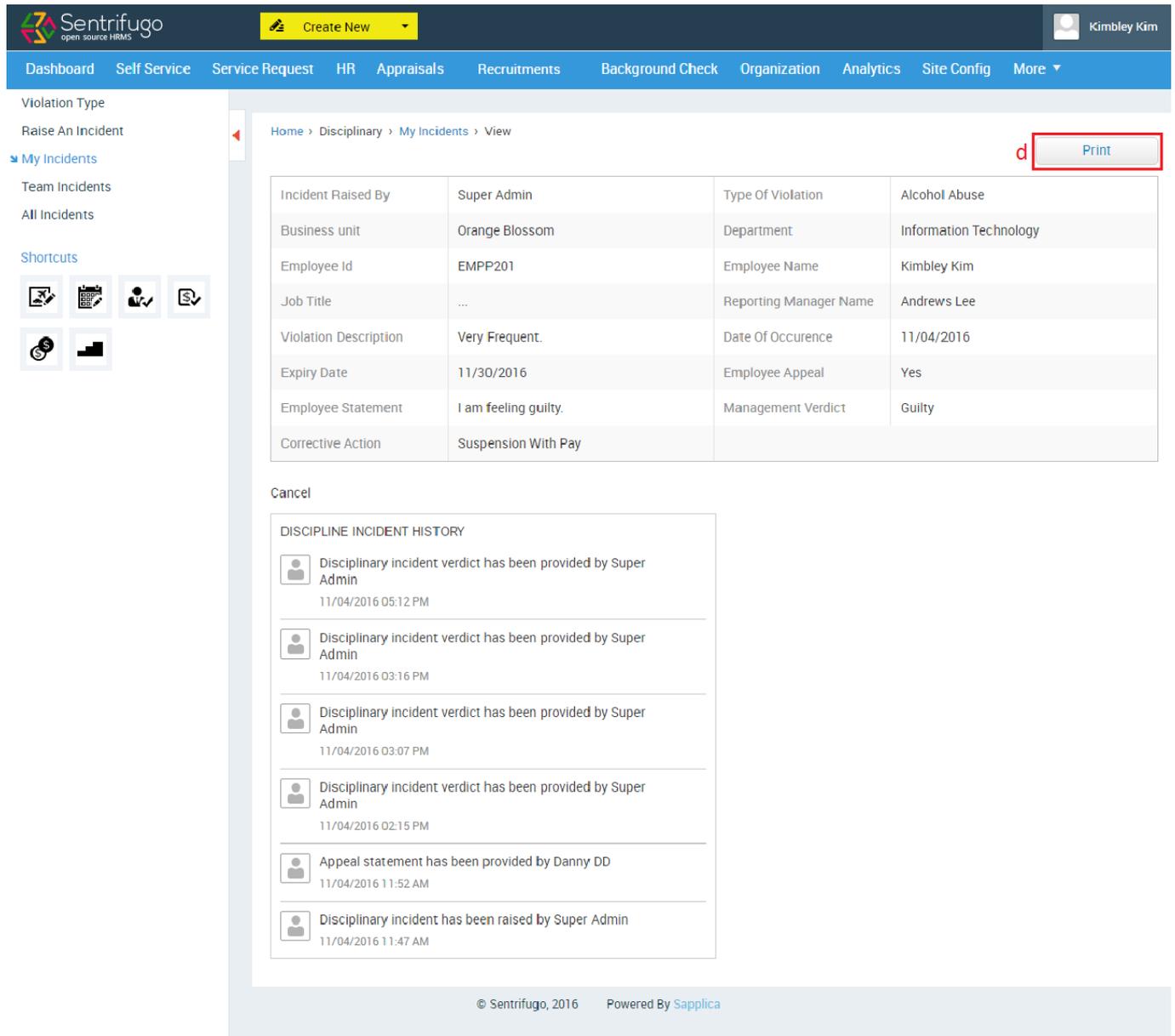


Action	Business Unit	Department	Violation Name	Date Of Occurrence	Verdict
	Orange Blossom	Information Technology	Alcohol Abuse	11/04/2016	Yes Guilty

Figure 263

- 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 264



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 264

d. Click **Print** button

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

Please refer Figure 265

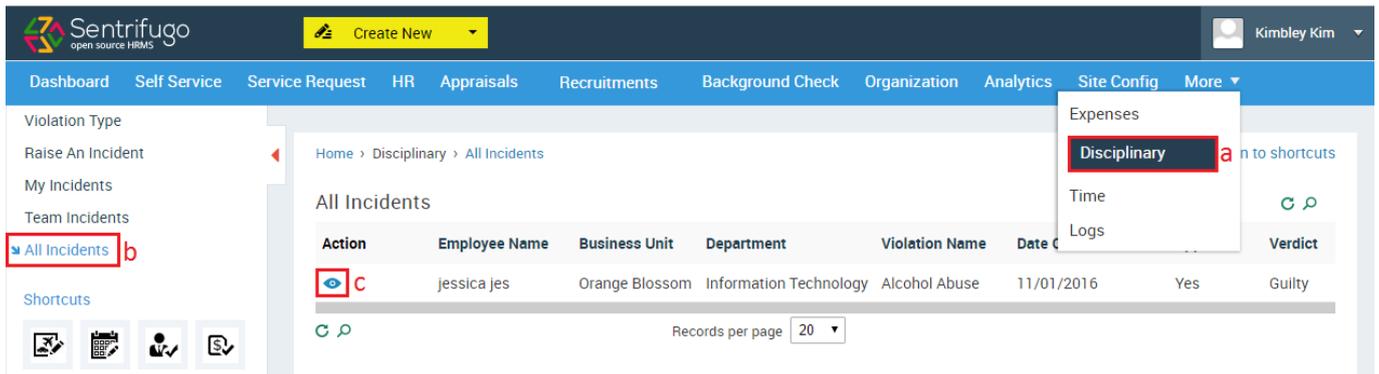


Figure 265

- 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 266

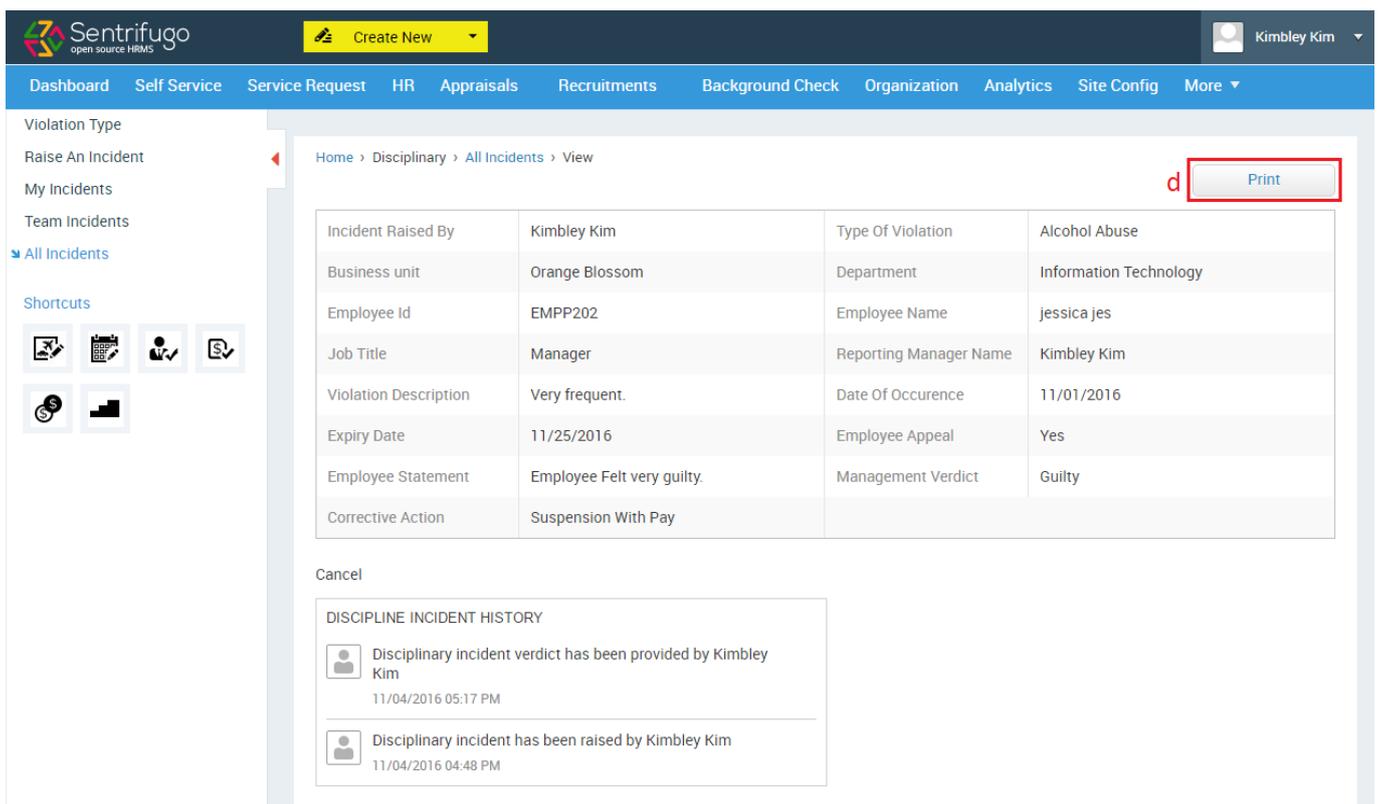
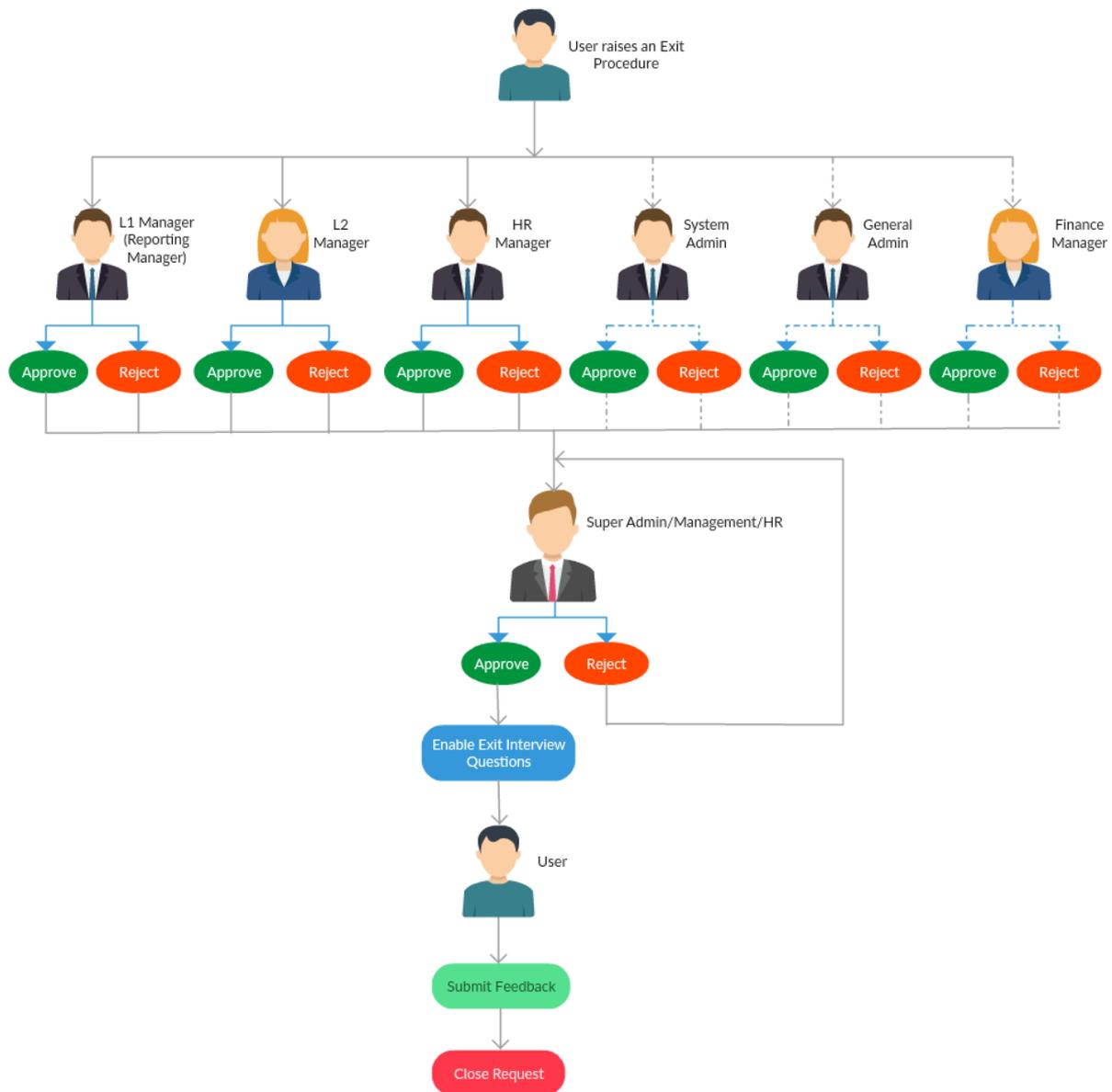


Figure 266

- d. Click **Print** button

18. Exit Procedure

Sentrifugo's Exit module will provide your organization a smooth and hassle free exit process. You can create a tailored exit process suitable for your organization. You can customize exit types, notice period, exit request approvers and exit interview questions. Employees can raise an exit request. All the mandatory and configured approvers will be able to provide their approval in an organized manner. Once the Exit Process has been completed, the employee will be enabled to provide his/her feedback through the Exit Interview Questions.



Description:

- A User raises an Exit Request.
- The Approvers and the User will receive an email notification.
- The Approvers can approve/reject the request.
- The Final approval will be done by the Super admin/Management/HR.
- After final approval, Exit interview questions will be enabled to the user by the Super Admin/Management/HR.
- User submits the feedback.
- The Exit Procedure will be closed.

18.1 How do I configure Exit Types?

Please refer Figure 267

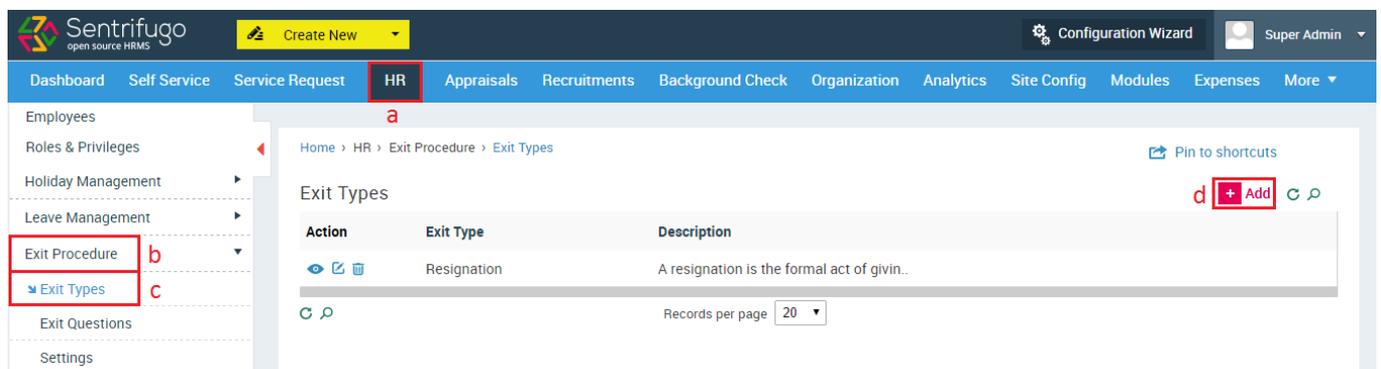


Figure 267

- Click **HR** in the top menu
- Click **Exit Procedure** on the left menu panel
- Click **Exit Types** in the submenu
- Click **+Add** button on the right side

Please refer Figure 268

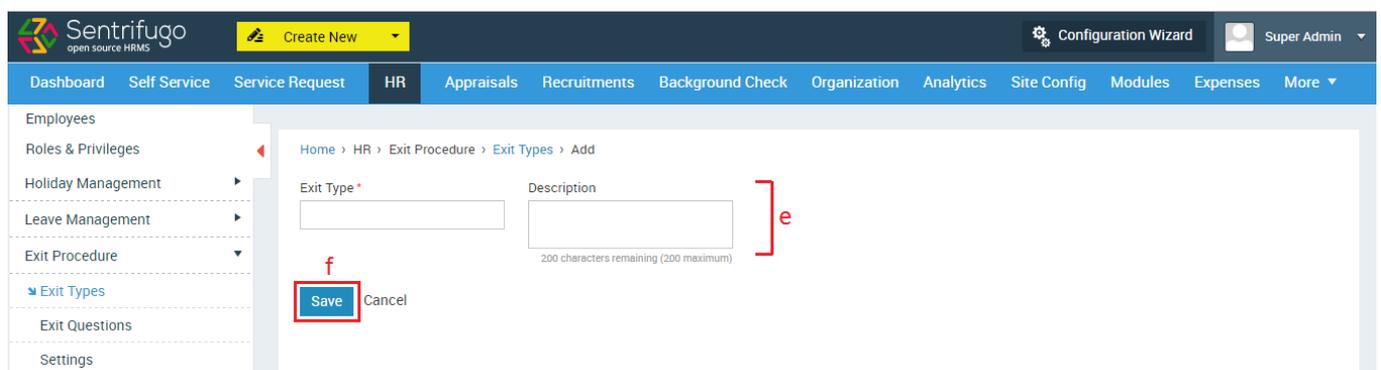
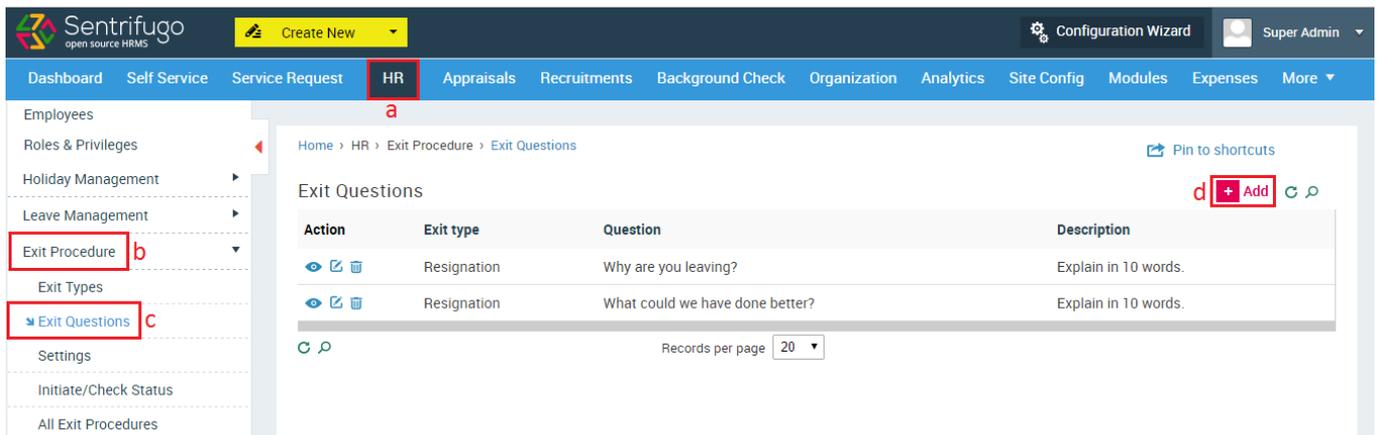


Figure 268

- e. Enter 'Exit Type' name and its description
- f. Click **Save** button

18.2 How do I configure Exit Questions?

Please refer Figure 269



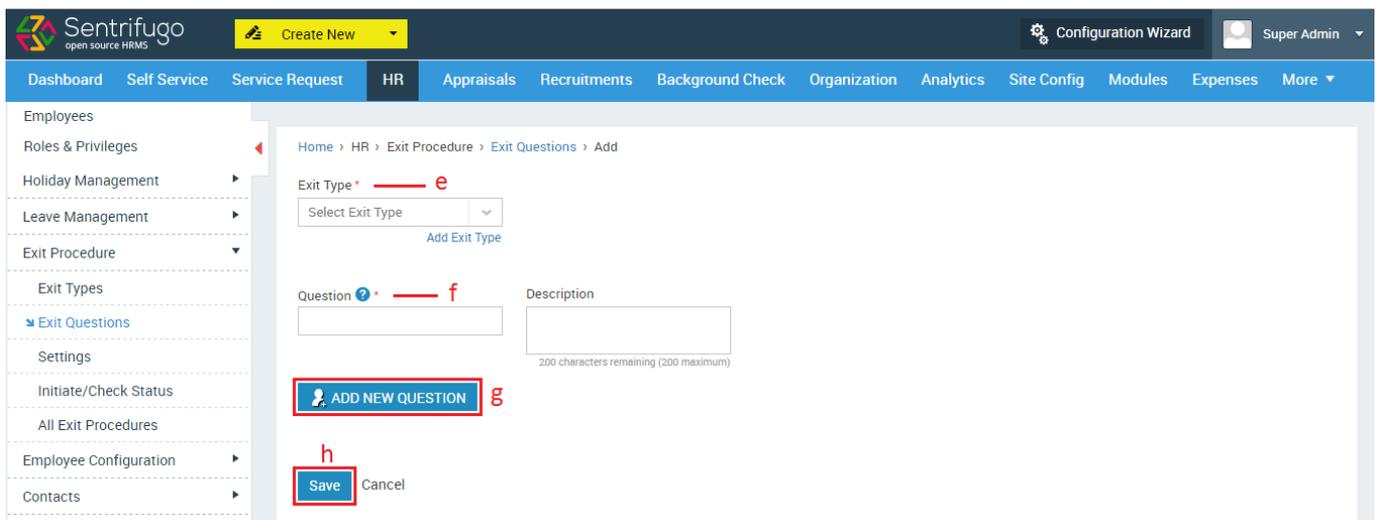
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', 'Modules', 'Expenses', and 'More'. The 'HR' menu item is highlighted with a red box and labeled 'a'. The left sidebar menu includes 'Employees', 'Roles & Privileges', 'Holiday Management', 'Leave Management', 'Exit Procedure', 'Exit Types', 'Settings', 'Initiate/Check Status', and 'All Exit Procedures'. 'Exit Procedure' is highlighted with a red box and labeled 'b', and 'Exit Questions' is highlighted with a red box and labeled 'c'. The main content area shows the 'Exit Questions' configuration page with a table of existing questions and an '+ Add' button highlighted with a red box and labeled 'd'.

Action	Exit type	Question	Description
	Resignation	Why are you leaving?	Explain in 10 words.
	Resignation	What could we have done better?	Explain in 10 words.

Figure 269

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

Please refer Figure 270



The screenshot shows the 'Add Exit Question' form in the Sentrifugo HRMS interface. The 'Exit Type' dropdown menu is highlighted with a red box and labeled 'e'. The 'Question' input field is highlighted with a red box and labeled 'f'. The 'ADD NEW QUESTION' button is highlighted with a red box and labeled 'g'. The 'Save' button is highlighted with a red box and labeled 'h'. The 'Description' field has a character count of '200 characters remaining (200 maximum)'.

Figure 270

- e. Select an Exit Type
- f. Enter a Question
- g. Click to enter a new question
- h. Click **Save** button

18.3 How do I configure Settings?

Please refer Figure 271

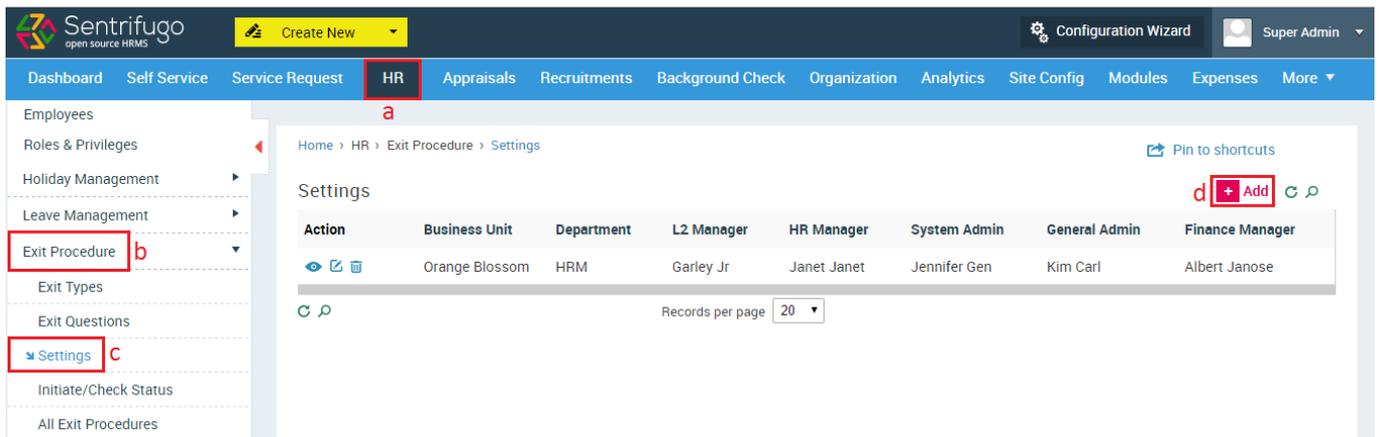


Figure 271

- a. Click **HR** in the top menu
- b. Click **Exit Procedure** on the left menu panel
- c. Click **Settings** in the submenu
- d. Click **+Add** button on the right side

Please refer Figure 272

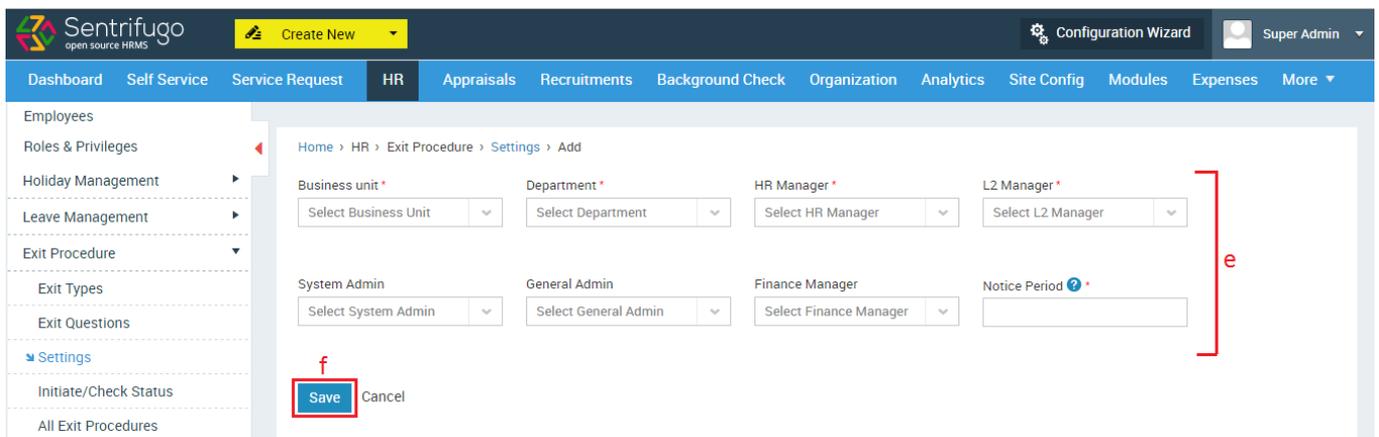


Figure 272

- e. Enter the required details

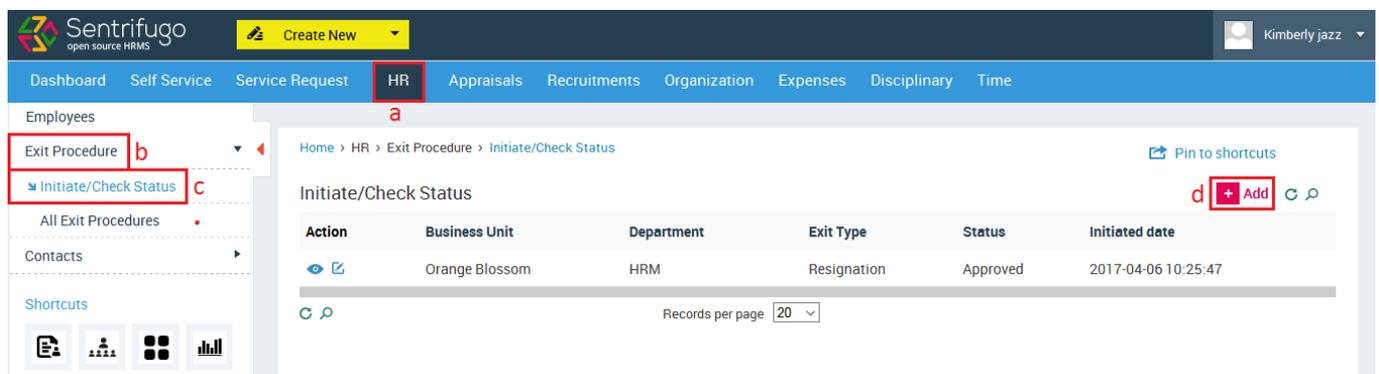
- f. Click **Save** button



The reporting manager of an employee will be considered as the L1 Manager during the Exit Procedure.

18.4 How do I initiate an Exit Procedure?

Please refer Figure 273



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', 'Disciplinary', and 'Time'. The left sidebar has 'Employees' with sub-items 'Exit Procedure', 'Initiate/Check Status', 'All Exit Procedures', and 'Contacts'. The main content area is titled 'Initiate/Check Status' and contains a table with the following data:

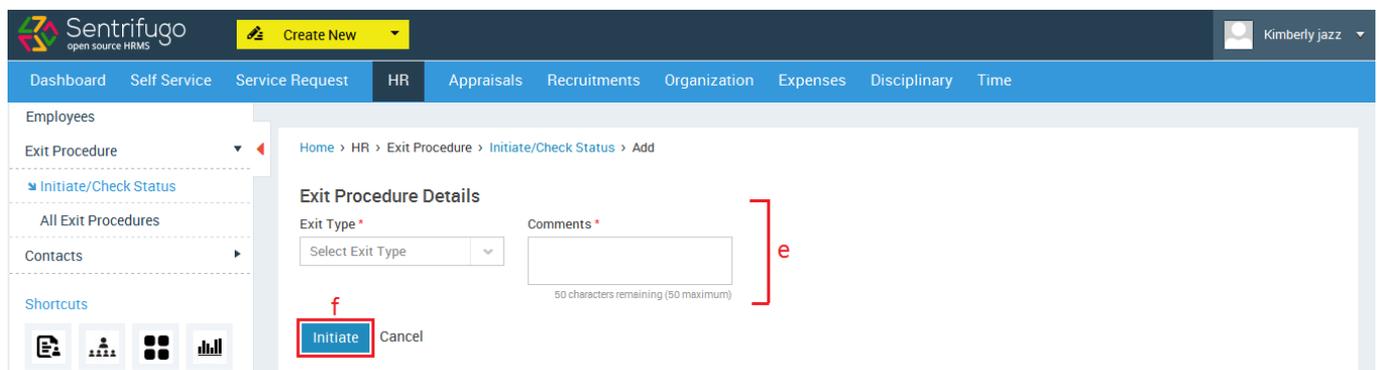
Action	Business Unit	Department	Exit Type	Status	Initiated date
	Orange Blossom	HRM	Resignation	Approved	2017-04-06 10:25:47

Below the table is a 'Records per page' dropdown set to '20'. A '+ Add' button is located on the right side of the table.

Figure 273

- Click **HR** in the top menu
- Click **Exit Procedure** on the left menu panel
- Click **Initiate/Check Status** in the submenu
- Click **+Add** button on the right side

Please refer Figure 274



The screenshot shows the 'Exit Procedure Details' form in the Sentrifugo HRMS interface. The form includes the following elements:

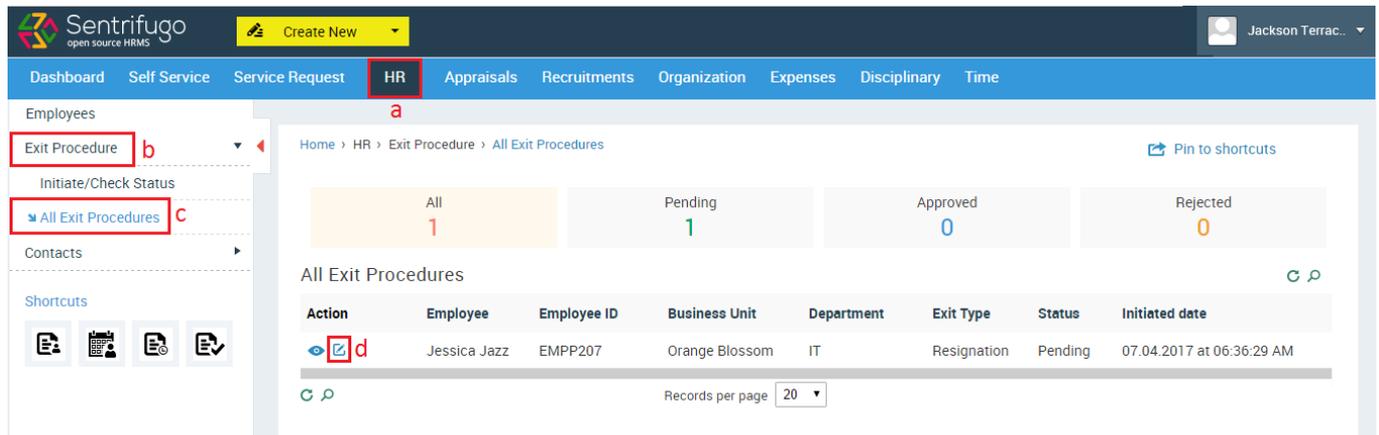
- Exit Type ***: A dropdown menu with the text 'Select Exit Type'.
- Comments ***: A text area with a character count of '50 characters remaining (50 maximum)'.
- Initiate**: A blue button with a white border, highlighted with a red box.
- Cancel**: A text label next to the 'Initiate' button.

Figure 274

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

18.5 How do I approve an Exit Procedure?

Please refer Figure 275

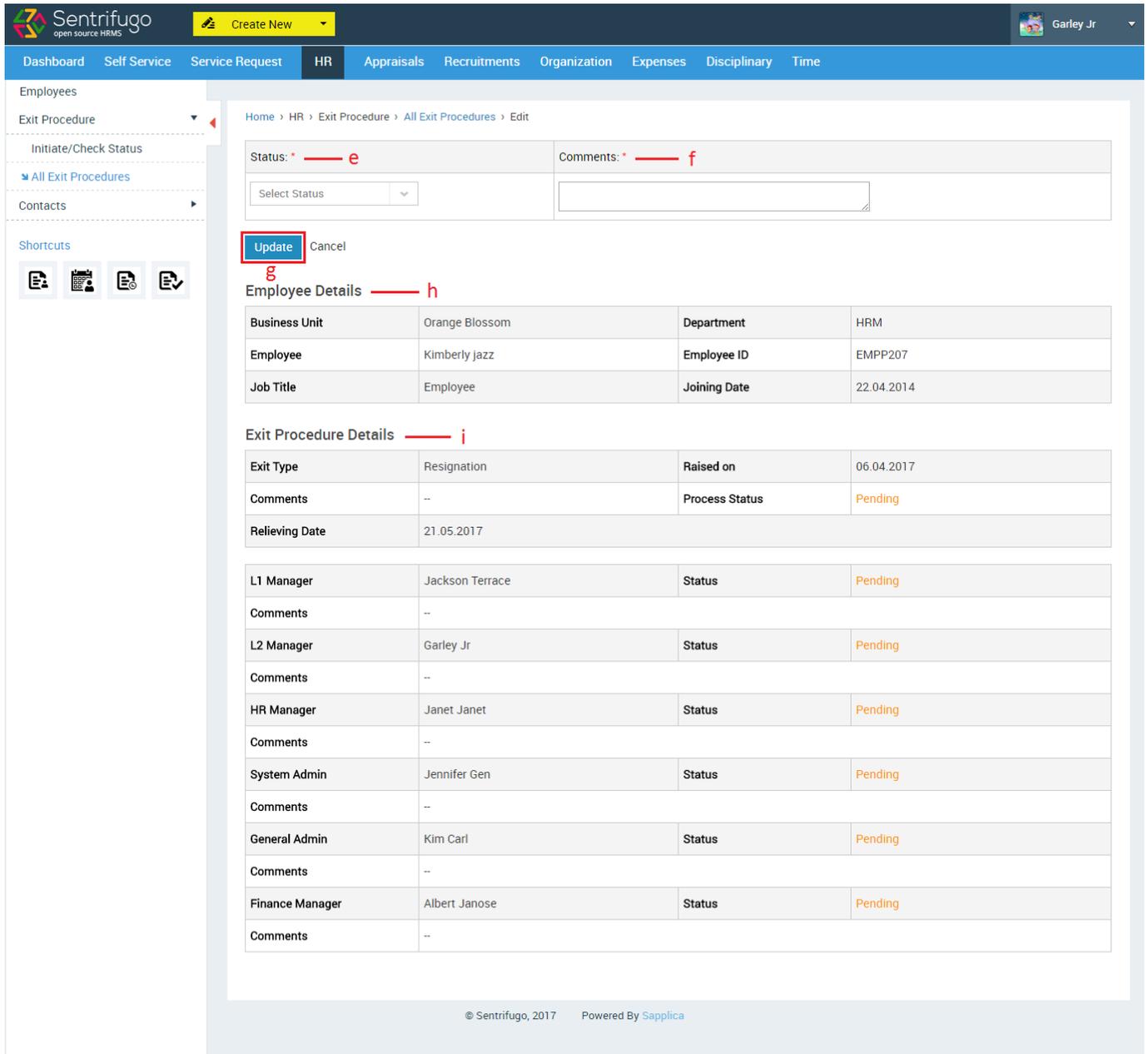


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', 'Disciplinary', and 'Time'. The 'HR' menu item is highlighted with a red box labeled 'a'. The left sidebar shows 'Employees' with a sub-menu containing 'Exit Procedure' (labeled 'b') and 'All Exit Procedures' (labeled 'c'). The main content area displays 'All Exit Procedures' with a summary table and a list of records. The summary table shows: All (1), Pending (1), Approved (0), and Rejected (0). The list table has columns: Action, Employee, Employee ID, Business Unit, Department, Exit Type, Status, and Initiated date. A record for Jessica Jazz (EMPP207) is shown with a status of Pending. The 'Action' column for this record has an 'Edit' icon highlighted with a red box labeled 'd'. The bottom of the list shows 'Records per page' set to 20.

Figure 275

- a. Click **HR** in the top menu
- b. Click **Exit Procedure** on the left menu panel
- c. Click **All Exit Procedures** in the submenu
- d. Click **Edit** icon against a record

Please refer Figure 276



Home > HR > Exit Procedure > All Exit Procedures > Edit

Status: * e Comments: * f

Select Status

Update g Cancel

Employee Details h

Business Unit	Orange Blossom	Department	HRM
Employee	Kimberly jazz	Employee ID	EMPP207
Job Title	Employee	Joining Date	22.04.2014

Exit Procedure Details i

Exit Type	Resignation	Raised on	06.04.2017
Comments	--	Process Status	Pending
Relieving Date	21.05.2017		

L1 Manager	Jackson Terrace	Status	Pending
Comments	--		
L2 Manager	Garley Jr	Status	Pending
Comments	--		
HR Manager	Janet Janet	Status	Pending
Comments	--		
System Admin	Jennifer Gen	Status	Pending
Comments	--		
General Admin	Kim Carl	Status	Pending
Comments	--		
Finance Manager	Albert Janose	Status	Pending
Comments	--		

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Figure 276

- a. Select Exit Status
- b. Enter Comments
- c. Click **Save** button
- d. Details of the employee can be viewed
- e. Details of the Exit Procedure along with the status of every level of approval can be viewed

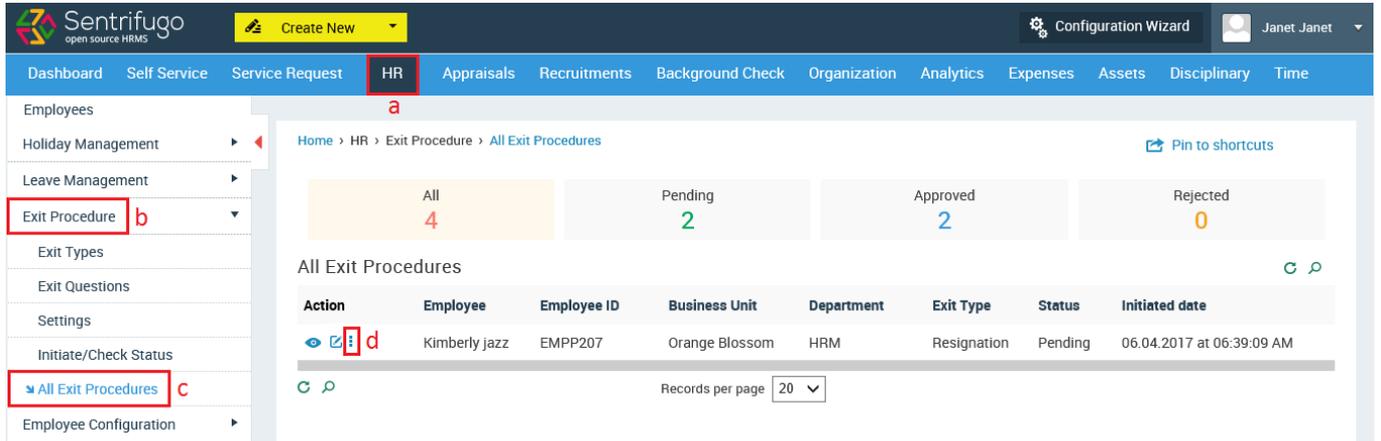


The same procedure (18.5) can be followed by all the roles for providing an approval.

18.6 How do I provide the final approval for an employee's Exit Procedure?

The final approval will be given by the Super Admin/Management/HR.

Please refer Figure 277



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'HR' (labeled 'a'). The left sidebar has 'Exit Procedure' (labeled 'b') and 'All Exit Procedures' (labeled 'c') highlighted. The main content area shows a summary card with 'All 4', 'Pending 2', 'Approved 2', and 'Rejected 0'. Below this is a table titled 'All Exit Procedures' with columns: Action, Employee, Employee ID, Business Unit, Department, Exit Type, Status, and Initiated date. A red box highlights the 'Edit/More' icon (labeled 'd') in the 'Action' column for the record of Kimberly jazz.

Action	Employee	Employee ID	Business Unit	Department	Exit Type	Status	Initiated date
	Kimberly jazz	EMPP207	Orange Blossom	HRM	Resignation	Pending	06.04.2017 at 06:39:09 AM

Figure 277

- Click **HR** in the top menu
- Click **Exit Procedure** on the left menu panel
- Click **All Exit Procedures** in the submenu
- Click **Edit/More** icon against a record

Please refer Figure 278

Update Overallstatus ✕

i This is the final exit procedure status.

Status: * e	Comments: * f	Relieving Date:
<input type="text" value="Select Status"/>	<input type="text"/>	<input type="text" value="22.05.2017"/>

Update

g

Employee Details

Business Unit	Orange Blossom	Department	IT
Employee	Jessica Jazz	Employee ID	EMPP207
Job Title	Employee	Joining Date	28.04.2015

Exit Procedure Details

Exit Type	Designation	Raised on	07.04.2017
-----------	-------------	-----------	------------

Figure 278

- e. Select Status
- f. Enter Comments
- g. Click **Save** button

18.7 How do I enable Questions for the Exit Interview?

Please refer Figure 279

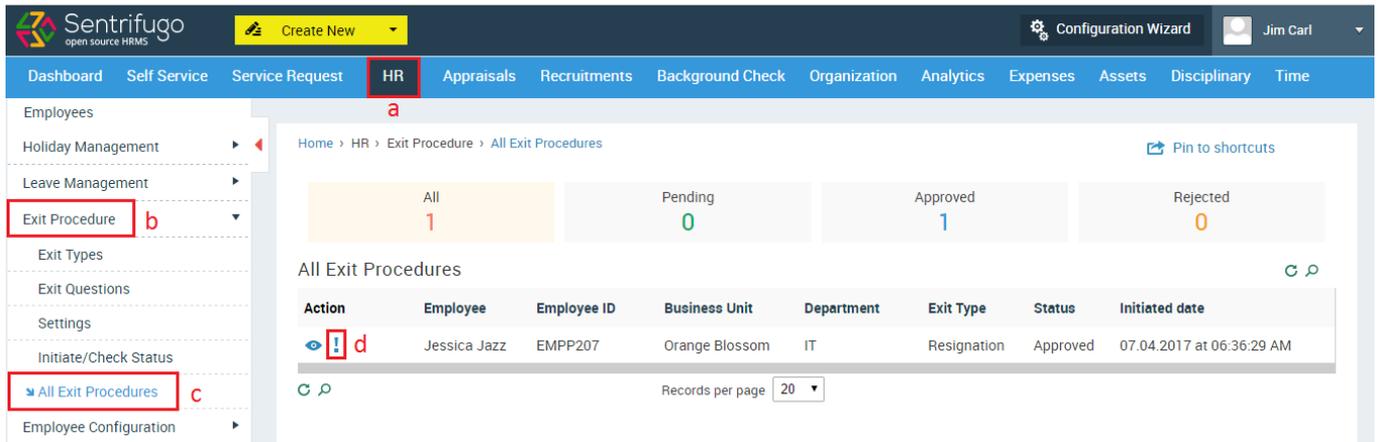


Figure 279

- a. Click **HR** in the top menu
- b. Click **Exit Procedure** on the left menu panel
- c. Click **All Exit Procedures** in the submenu
- d. Click **Questions** icon against a record

Please refer Figure 280

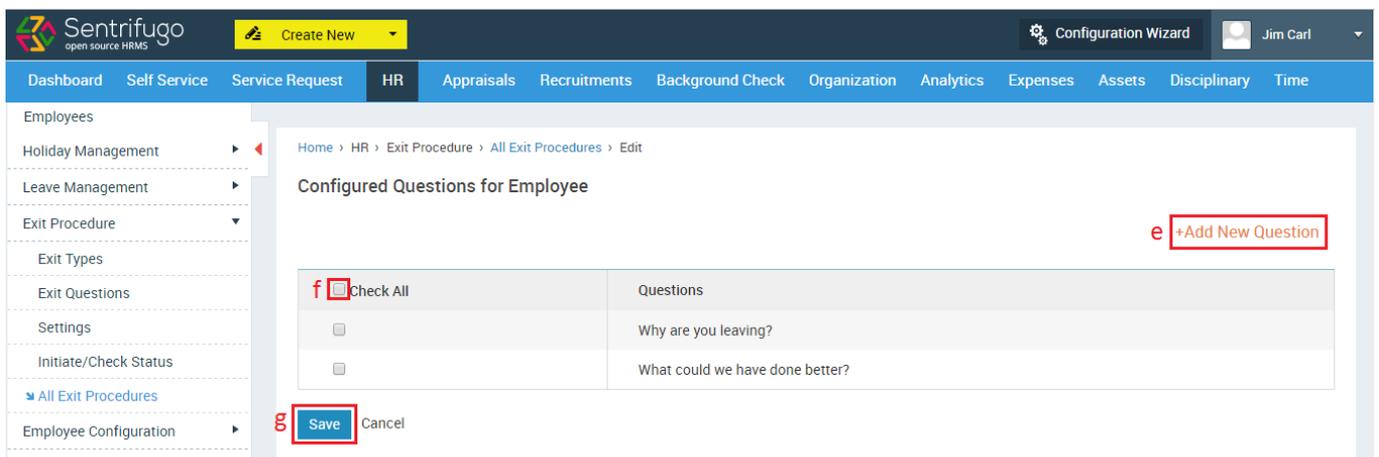


Figure 280

- e. Click to add new questions
- f. Check the checkbox to select questions
- g. Click **Save** button

18.8 How do I answer Questions for the Exit Interview?

Please refer Figure 281

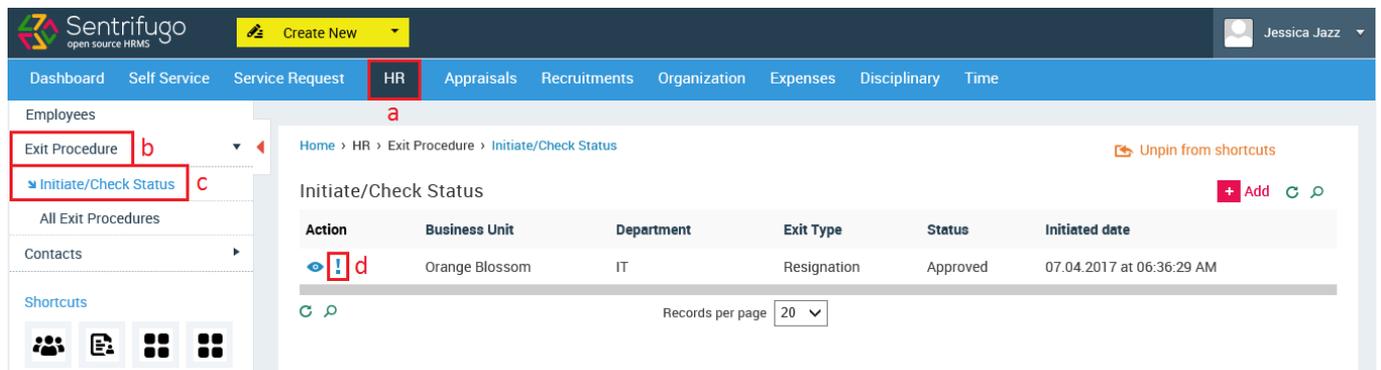


Figure 281

- Click **HR** in the top menu
- Click **Exit Procedure** on the left menu panel
- Click **All Exit Procedures** in the submenu
- Click **Questions** icon against a record

Please refer Figure 282

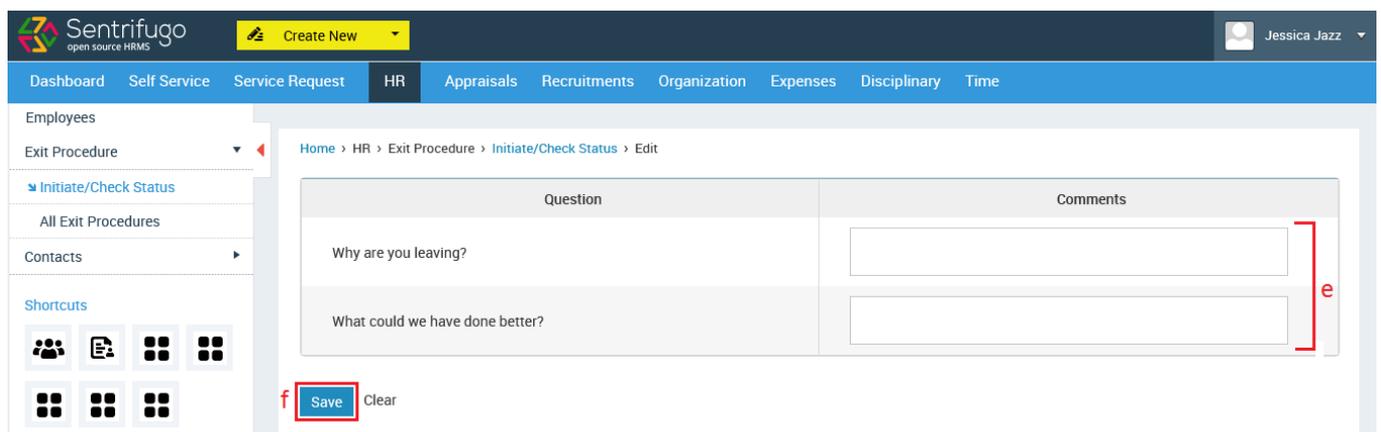


Figure 282

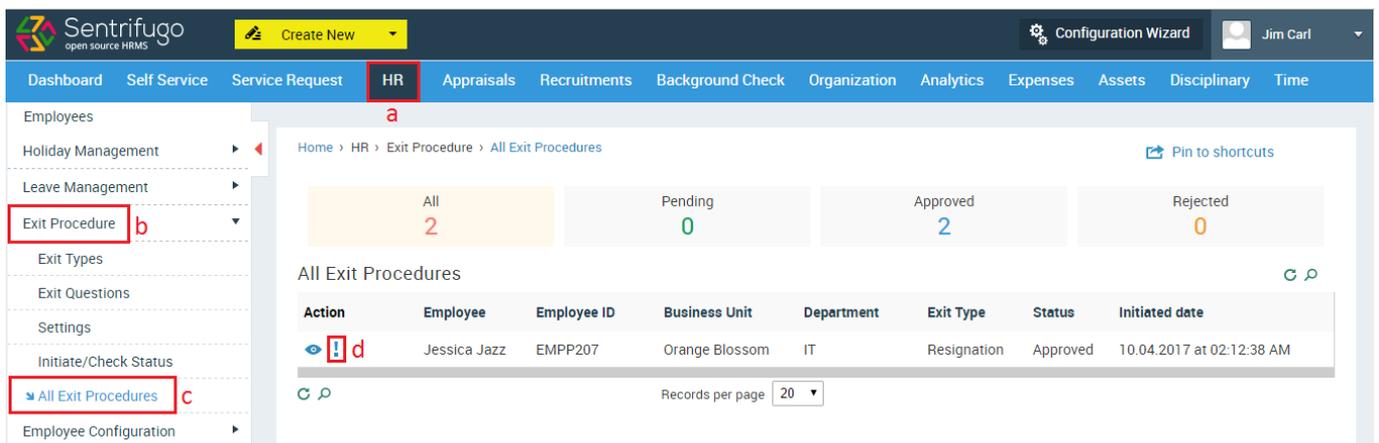
- Enter Comments
- Click **Save** button



An email notification will be sent to the employee.

18.9 How do I view an employee's Exit Interview feedback?

Please refer Figure 283



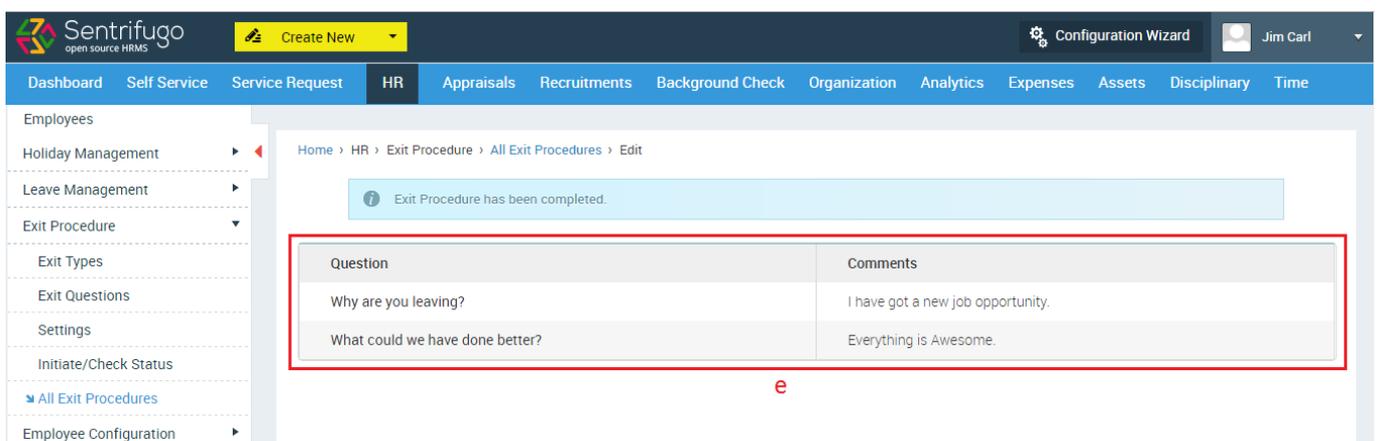
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Expenses', 'Assets', 'Disciplinary', and 'Time'. The left sidebar menu has 'Exit Procedure' highlighted with a red box 'b'. The main content area shows 'All Exit Procedures' with a summary table and a list of records. The 'All Exit Procedures' sub-menu item is highlighted with a red box 'c'. A red box 'd' highlights the 'Questions' icon in the table row for Jessica Jazz.

Action	Employee	Employee ID	Business Unit	Department	Exit Type	Status	Initiated date
	Jessica Jazz	EMPP207	Orange Blossom	IT	Resignation	Approved	10.04.2017 at 02:12:38 AM

Figure 283

- Click **HR** in the top menu
- Click **Exit Procedure** on the left menu panel
- Click **All Exit Procedures** in the submenu
- Click **Questions** icon against a record

Please refer Figure 284



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', 'Disciplinary', and 'Time'. The left sidebar menu has 'Exit Procedure' highlighted with a red box 'b'. The main content area shows 'All Exit Procedures' with a summary table and a list of records. The 'All Exit Procedures' sub-menu item is highlighted with a red box 'c'. A red box 'd' highlights the 'Questions' icon in the table row for Jessica Jazz.

Exit Procedure has been completed.

Question	Comments
Why are you leaving?	I have got a new job opportunity.
What could we have done better?	Everything is Awesome.

Figure 284

e. Feedback of Exit Interview

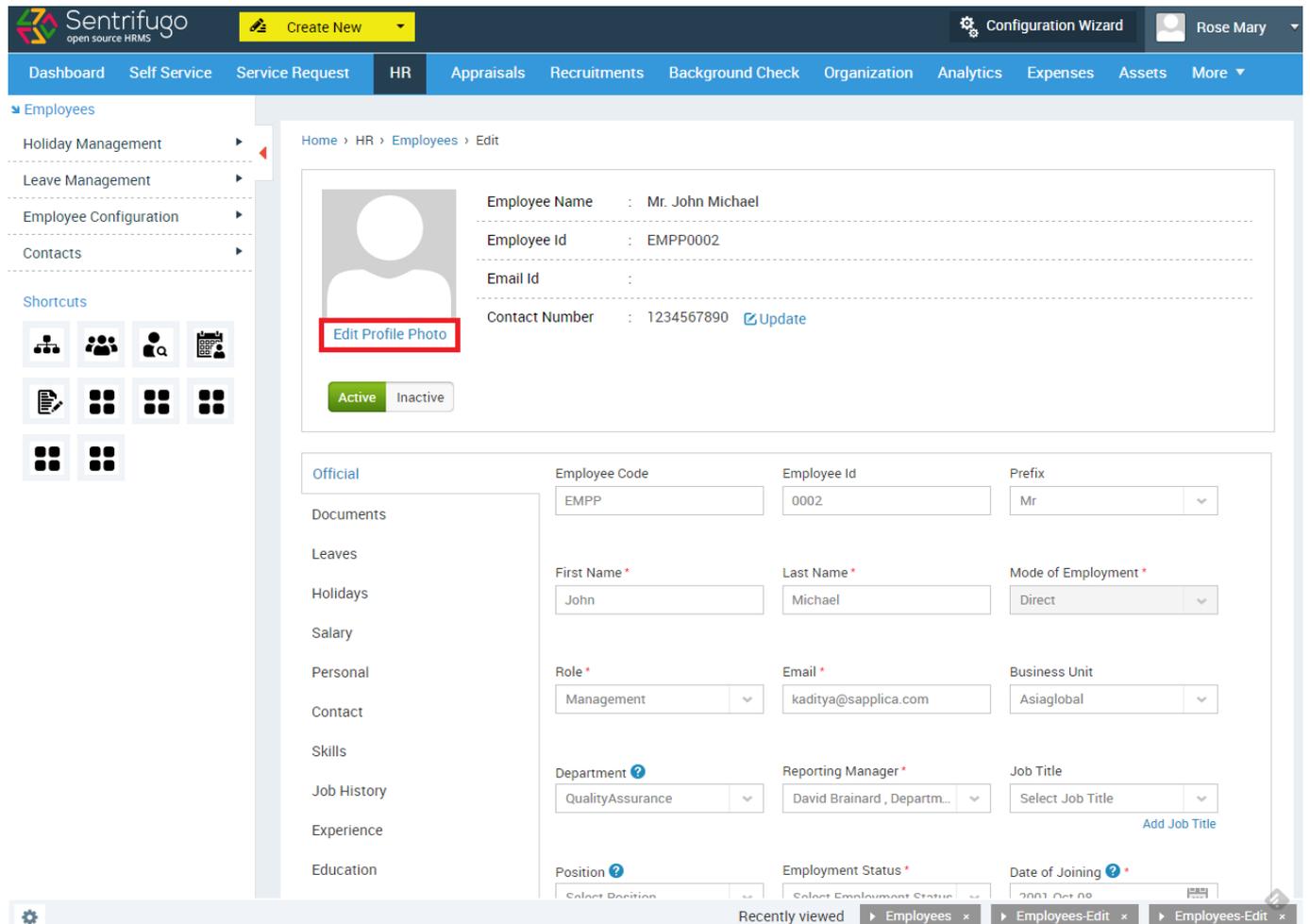


An employee's Exit Procedure can be viewed by Super Admin/Management/HR.

19. Additional Features

Upload Employees' Profile Photo as HR

HR can now upload employees' profile photos.



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 *

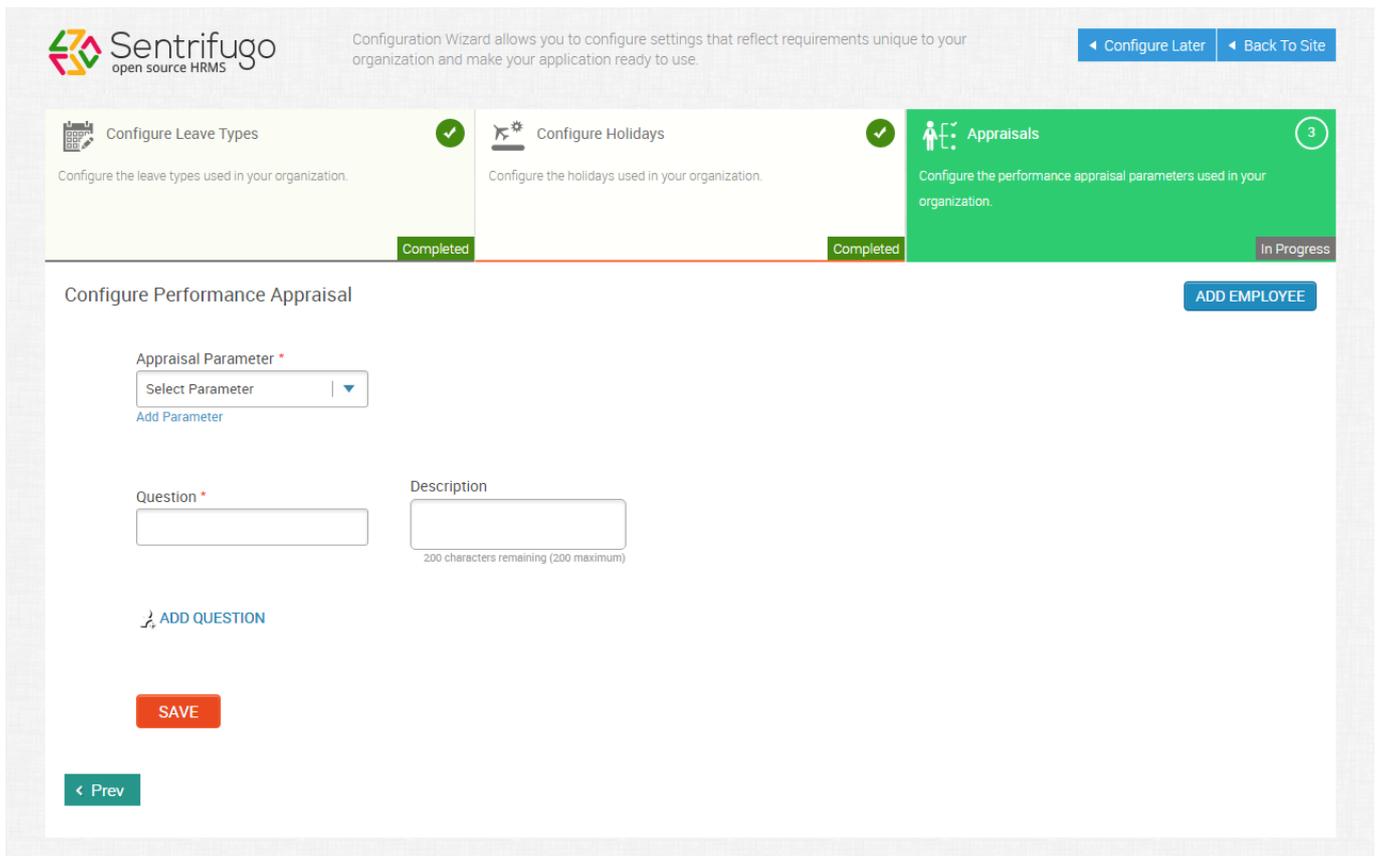
Date ? *

[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**: Completed (green checkmark)
- Configure Holidays**: Completed (green checkmark)
- Appraisals**: In Progress (3 in a circle)

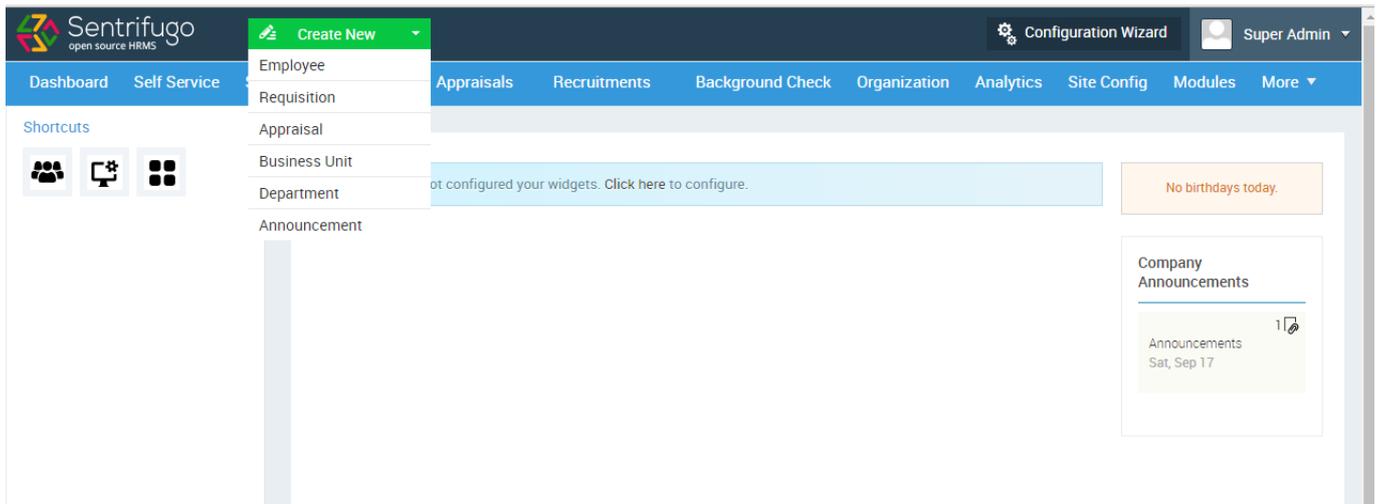
The main content area is titled "Configure Performance Appraisal" and includes an "ADD EMPLOYEE" button. The form contains:

- 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.

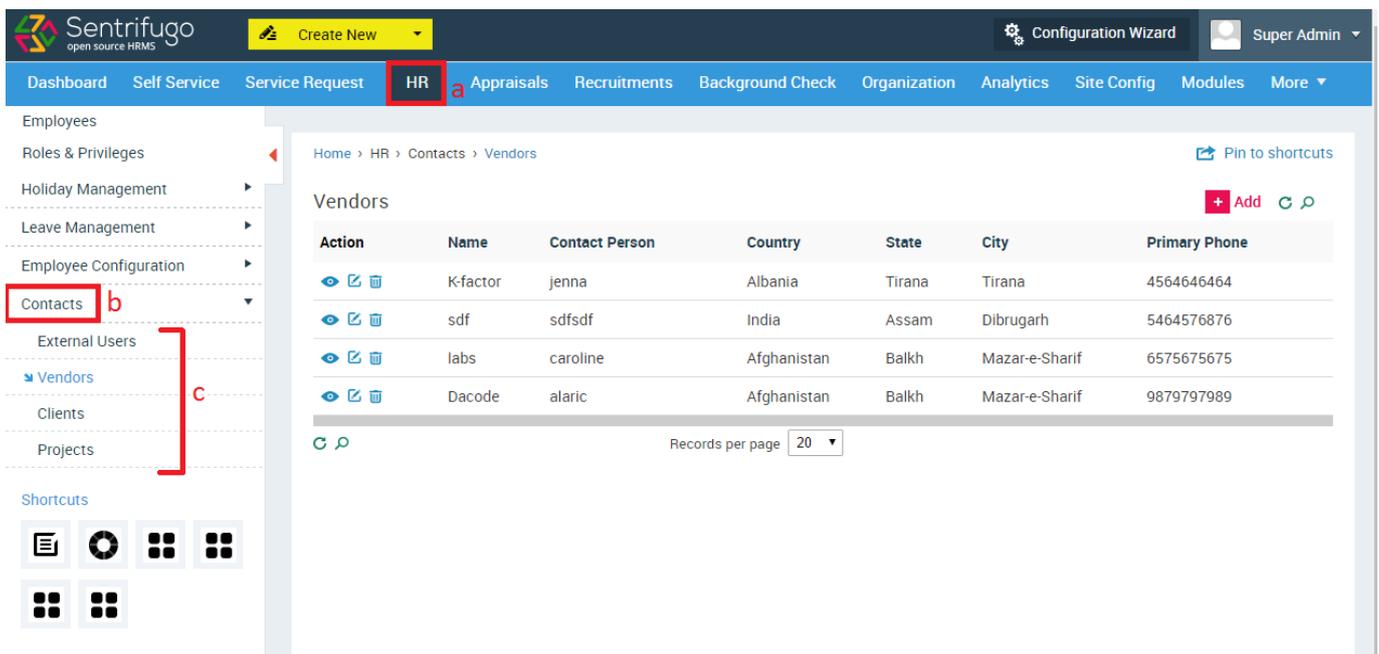
Create New Shortcut Button

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