

# Sentrifugo

## User Guide

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# Getting Started

## What is Configuration Wizard

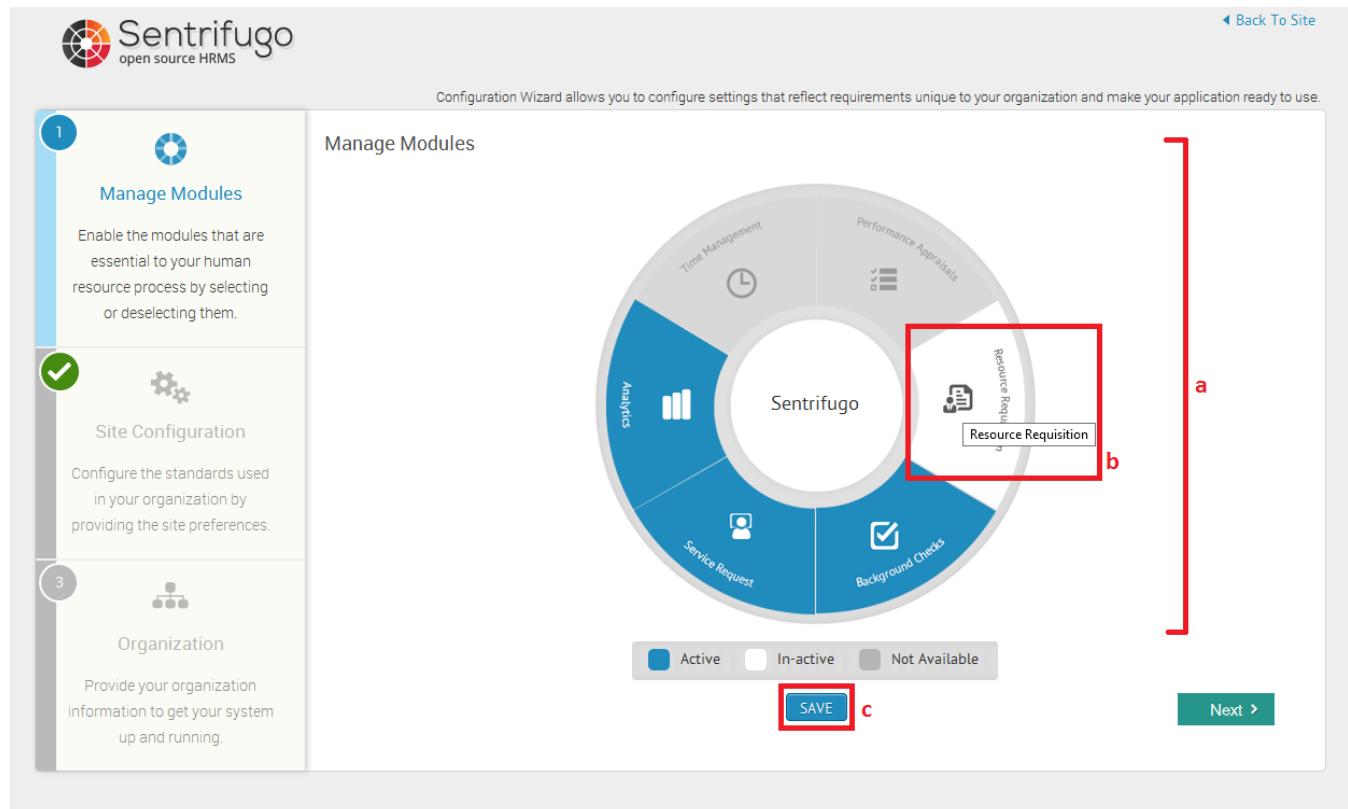
Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use. Wizard is the first screen that is displayed if you have logged into the application for the very first time. Wizard enables you to enter the essential information that makes your application ready to add employees to your organization right away.

## How do I go about the Configuration Wizard

Information is gathered in three sections. The first is the Manage Module section.

- All the modules are displayed in circular representation
- Click on the module icon to make it active or inactive
- Click on Save to save the changes made.

For further understanding, refer Figure 1



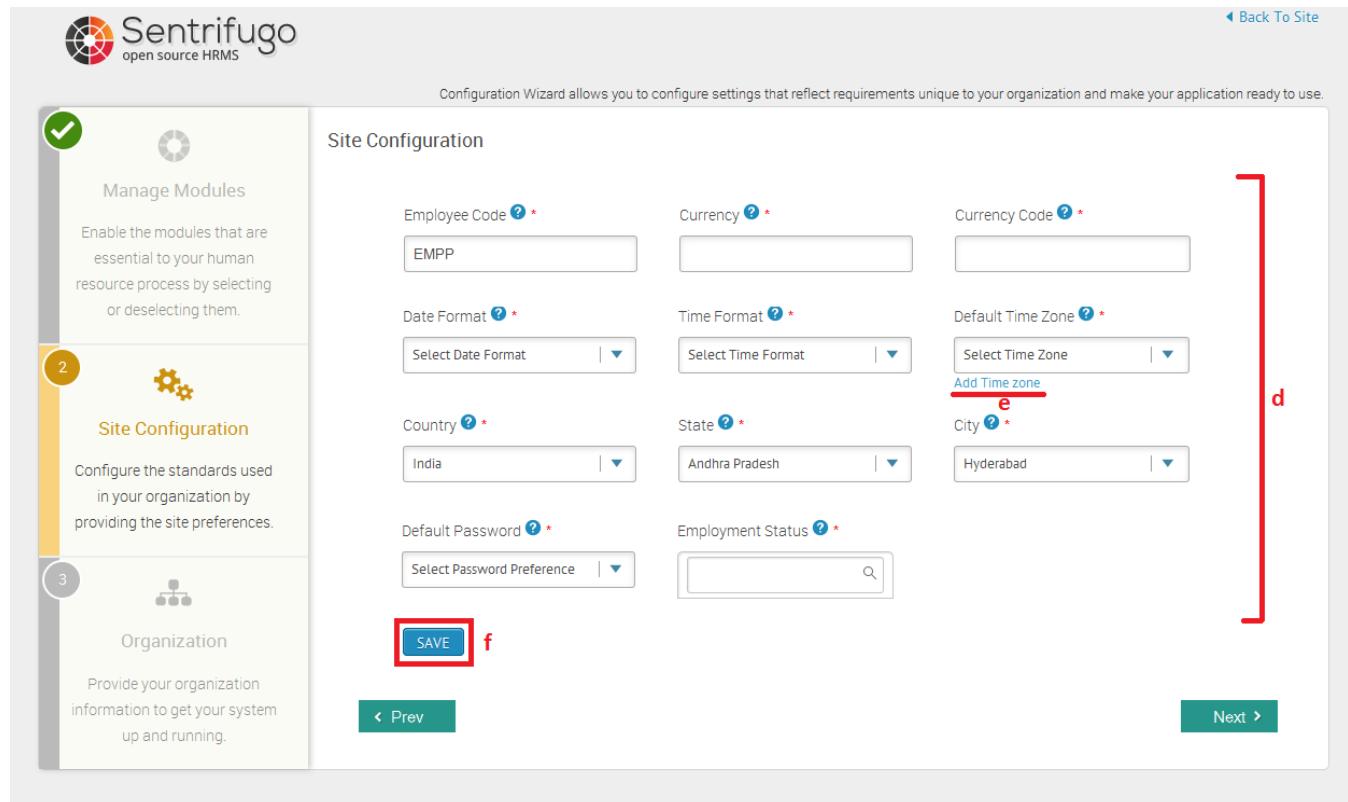
The screenshot shows the 'Manage Modules' section of the Configuration Wizard. On the left, there's a sidebar with three tabs: 'Manage Modules' (selected), 'Site Configuration', and 'Organization'. The main area features a circular diagram with six segments representing different modules: 'Time Management' (clock icon), 'Performance Appraisals' (bar chart icon), 'Resource Requisition' (person icon), 'Background Checks' (checkmark icon), 'Service Request' (person icon), and 'Analytics' (bar chart icon). A red bracket labeled 'a' points to the 'Resource Requisition' segment. A red box labeled 'b' highlights the 'Resource Requisition' segment. A red box labeled 'c' highlights the 'SAVE' button at the bottom. Below the diagram is a legend: a blue square for 'Active', a white square for 'In-active', and a grey square for 'Not Available'. At the bottom right are 'Next >' and 'Back To Site' buttons.

Refer Figure 1

In the Site Configuration section, all the countries, their states and cities are displayed by default so as to empower the application administrator to configure the standards.

- d. Make changes to the Site Configurations based on your organization preferences
- e. Click on Add Time Zone to add the required time zone
- f. Click on Save to apply the changes to the application

For further understanding, refer Figure 2



**Site Configuration**

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

**Manage Modules**  
Enable the modules that are essential to your human resource process by selecting or deselecting them.

**Site Configuration**  
Configure the standards used in your organization by providing the site preferences.

**Organization**  
Provide your organization information to get your system up and running.

**Employee Code** \* EMPP

**Currency** \*

**Currency Code** \*

**Date Format** \* Select Date Format

**Time Format** \* Select Time Format

**Default Time Zone** \* Select Time Zone  
**Add Time zone**

**Country** \* India

**State** \* Andhra Pradesh

**City** \* Hyderabad

**Default Password** \* Select Password Preference

**Employment Status** \*

**SAVE** f

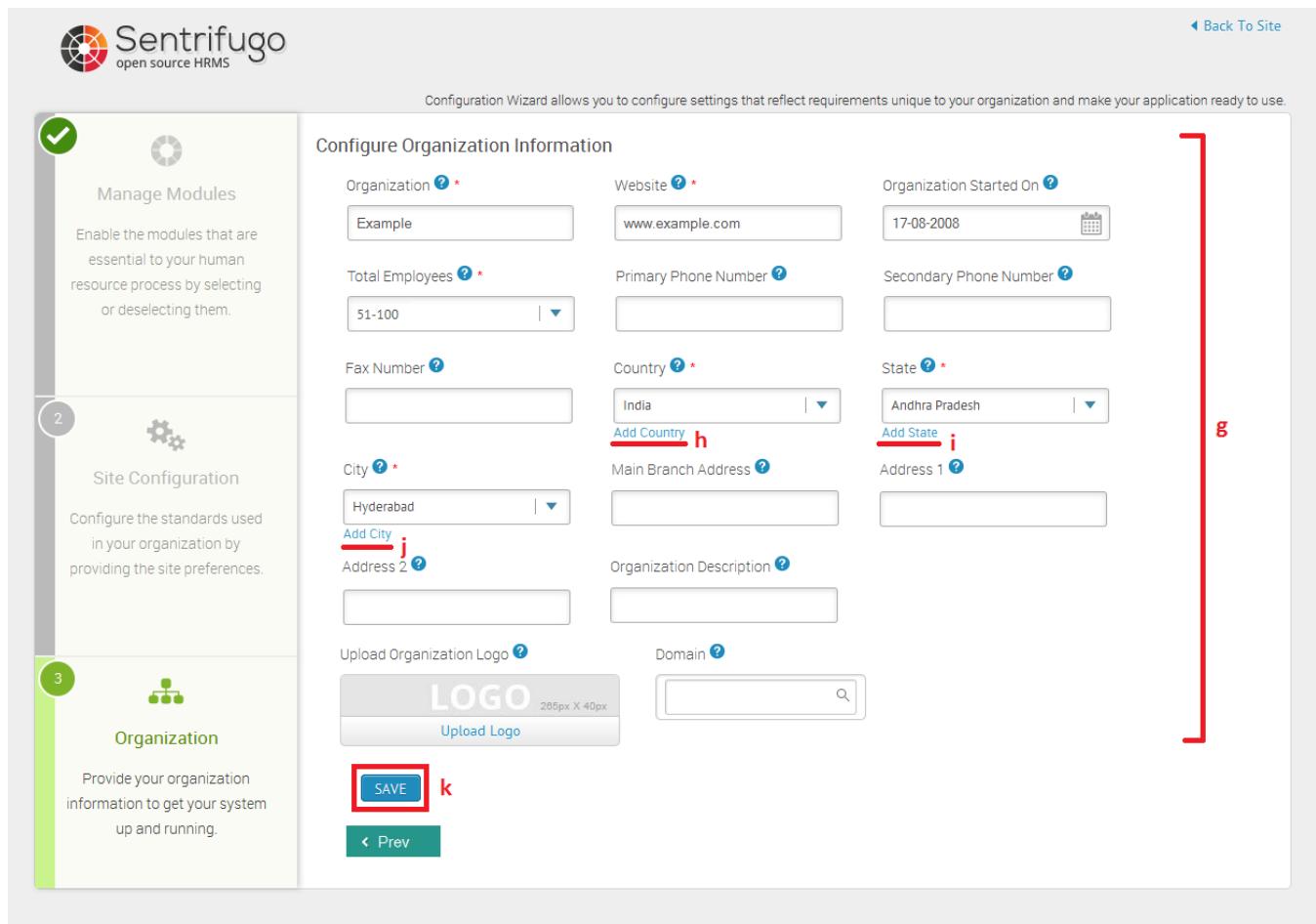
◀ Prev Next ▶

Refer Figure 2

In the Organization section, provide organization information

- g. Enter the information of the organization
- h. Click on Add Country to add the required country
- i. Click on Add State to add the required state
- j. Click on Add City to add the required city
- k. Click on Save to save the organization information

For further understanding, refer Figure 3



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

**Configure Organization Information**

Organization ? *	Website ? *	Organization Started On ?
Example	www.example.com	17-08-2008
Total Employees ? *	Primary Phone Number ?	Secondary Phone Number ?
51-100		
Fax Number ?	Country ? *	State ? *
	India	Andhra Pradesh
City ? *	Main Branch Address ?	Address 1 ?
Hyderabad		
Add City	Add State	
Address 2 ?		
Upload Organization Logo ?	Domain ?	
<b>LOGO</b> 285px X 40px		
<b>Upload Logo</b>		
<b>SAVE</b>		
<b>&lt; Prev</b>		

Figure 3

## What Can be done with Sentrifugo's Dashboard:

Dashboard is a new feature in Sentrifugo enabling you to have all the information you need at a glance. You can decide what elements you need on the dashboard by configuring widgets. Not only that, you can view your colleague's daily and upcoming birthdays updates and announcements for a department or for an entire business unit from your management.

- a. Click on the organization logo in the top left of the header
- b. Click on Click here link in the Dashboard panel in the left side

For further understanding, refer figure 4

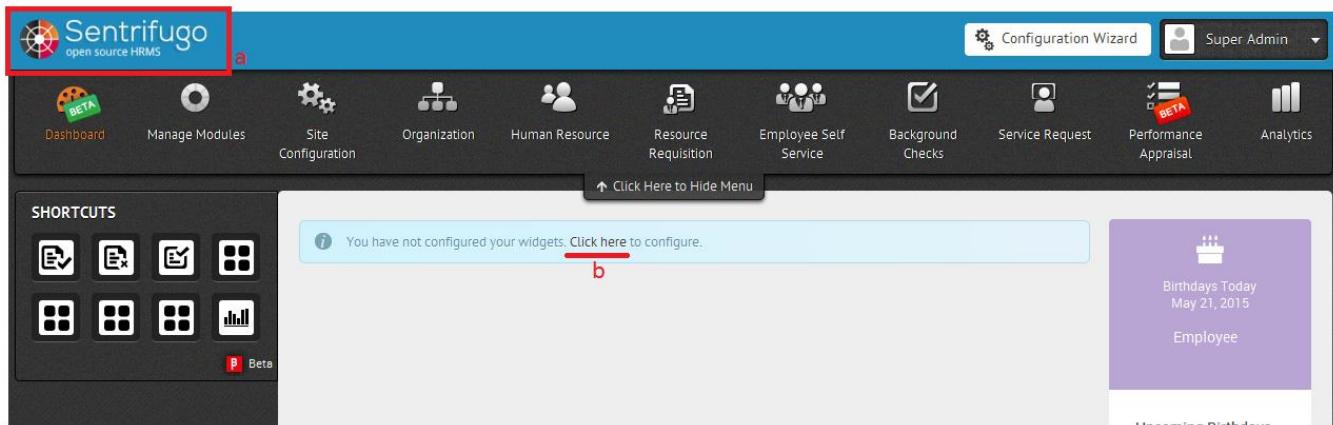


Figure 4

Or

- c. Click on logged in user's name in the top right of the header
- d. Click on Settings in the dropdown

Or

- e. Click on Settings icon in the bottom left of the footer
- f. Select Widgets button in the settings page
- g. Drag and drop the selected menu item(s) in the widgets box
- h. Click on Save to add Widgets in the Widgets panel

Refer Figure 5

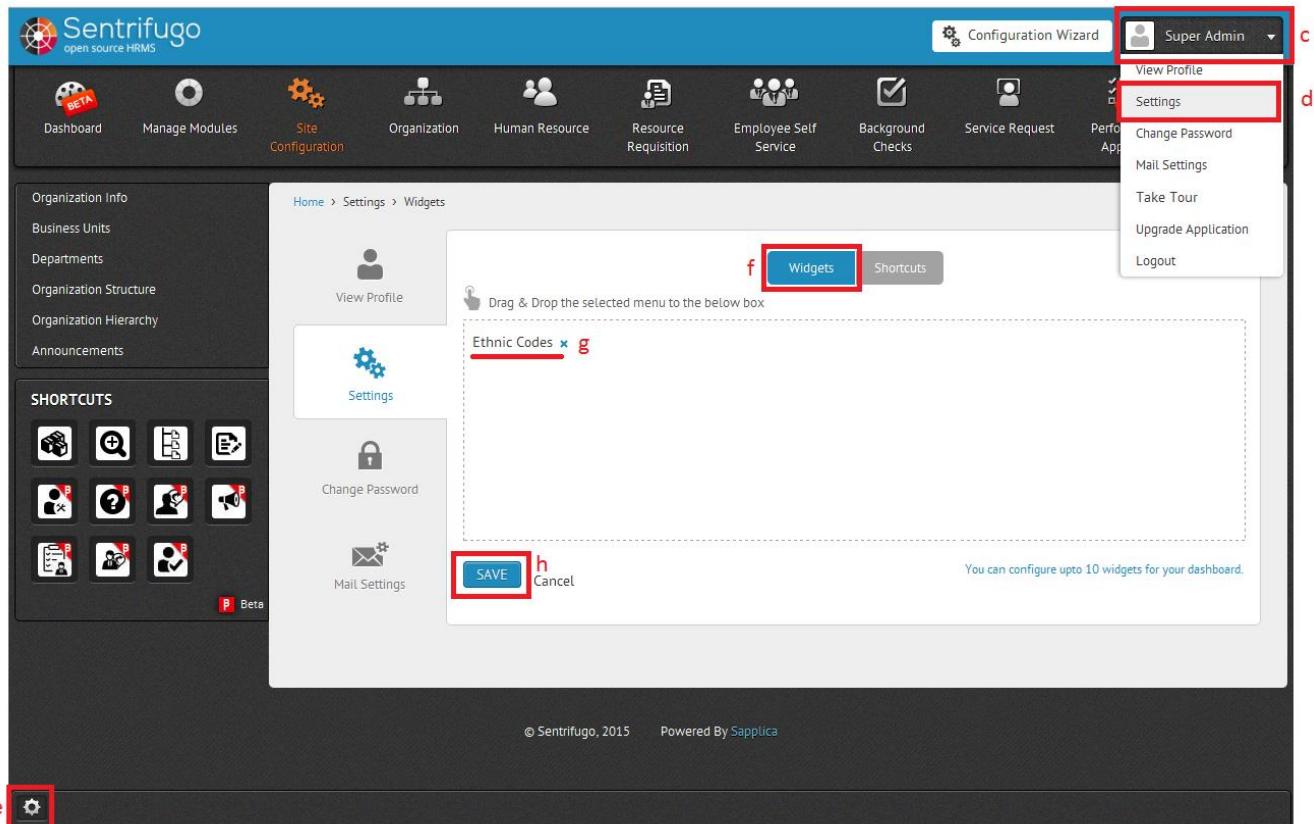


Figure 5

For announcements:

- a. Click on organization in the top menu
  - b. Click on Announcements
  - c. Click on Add
  - d. Select the business unit(s), department and title
  - e. Enter the description and upload attachments if any
  - f. Click on Post to post the announcements

Refer figure 6

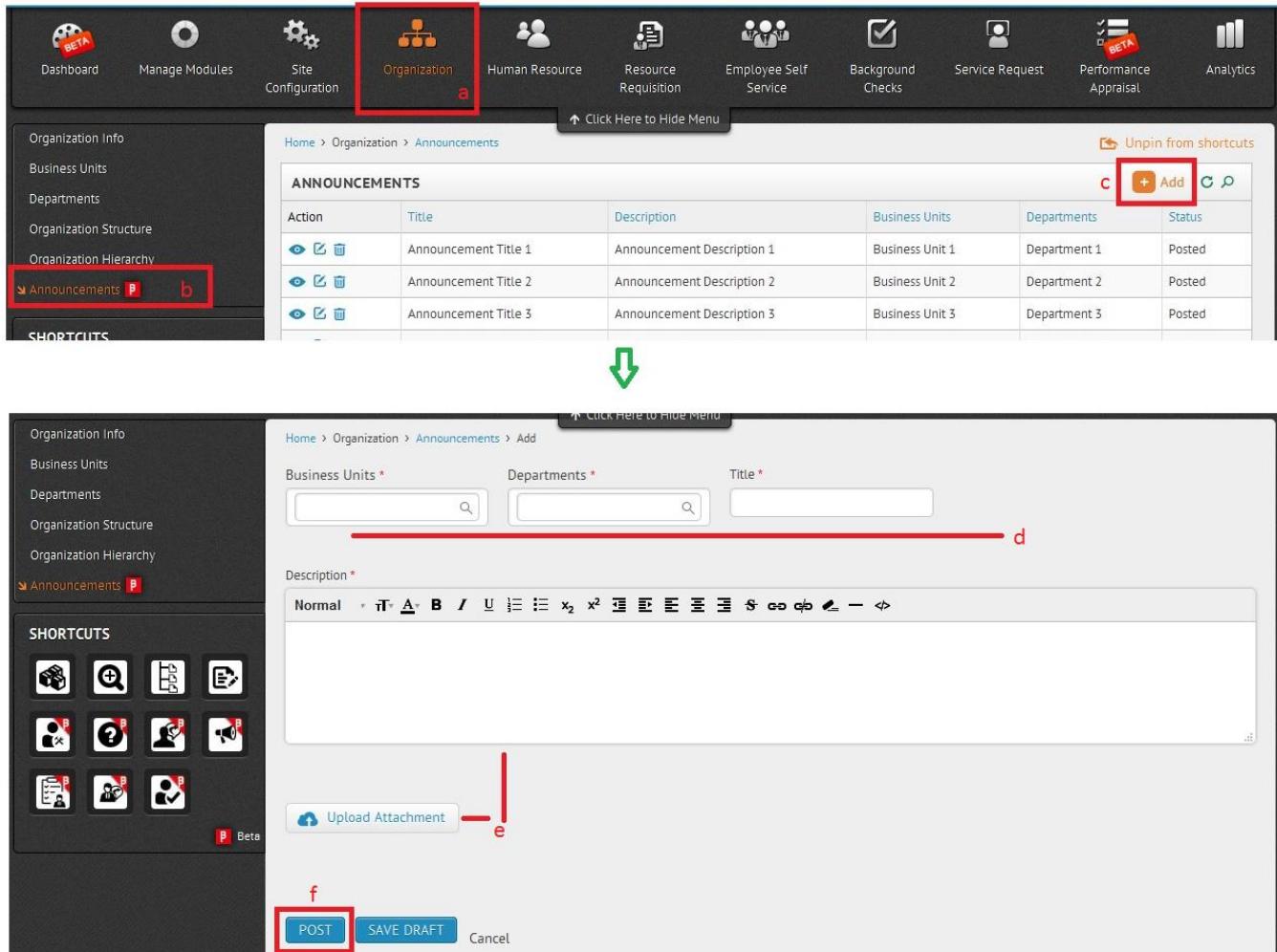
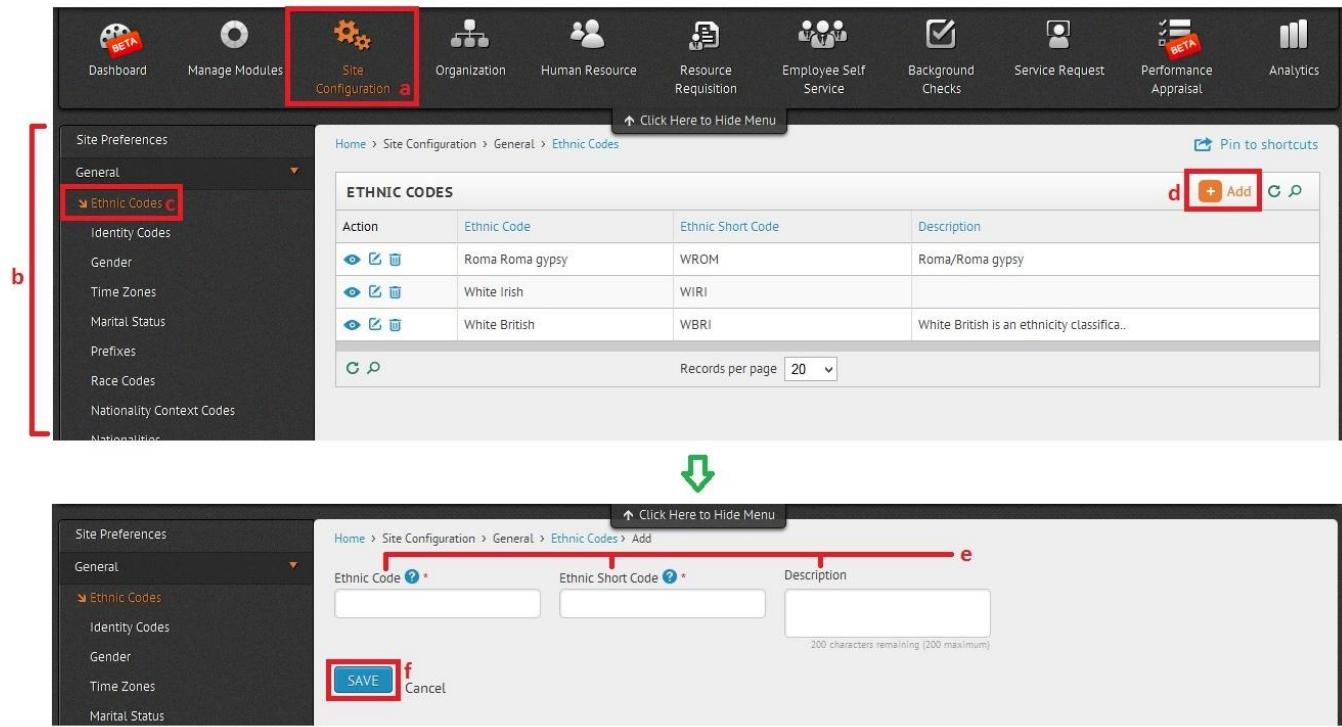


Figure 6

## How to Set Site Configurations within the Application:

- a. Click on Site Configurations in the top menu
- b. The left side panel will display the submenus
- c. Click on the desired submenu
- d. Click on the Add button on the right side panel
- e. Enter the required details
- f. Click Save button to add the details

For further understanding, refer Figure 7, which explains about adding Ethnic Codes



**Top Screenshot: Adding Ethnic Codes**

The top screenshot shows the Sentrifugo application interface. The top navigation bar includes links for Dashboard, Manage Modules, Site Configuration (highlighted with a red box 'a'), Organization, Human Resource, Resource Requisition, Employee Self Service, Background Checks, Service Request, Performance Appraisal (with a BETA badge), and Analytics.

The left sidebar under 'Site Preferences' shows a tree view with 'General' expanded, and 'Ethnic Codes' selected (highlighted with a red box 'c'). Other options include Identity Codes, Gender, Time Zones, Marital Status, Prefixes, Race Codes, Nationality Context Codes, and Measurement.

The main content area displays a table titled 'ETHNIC CODES' with three rows of data:

Action	Ethnic Code	Ethnic Short Code	Description
	Roma Roma gypsy	WROM	Roma/Roma gypsy
	White Irish	WIRI	
	White British	WBRI	White British is an ethnicity classifica...

At the bottom, there is a 'Records per page' dropdown set to 20 and a green search icon.

**Bottom Screenshot: Adding Ethnic Code Form**

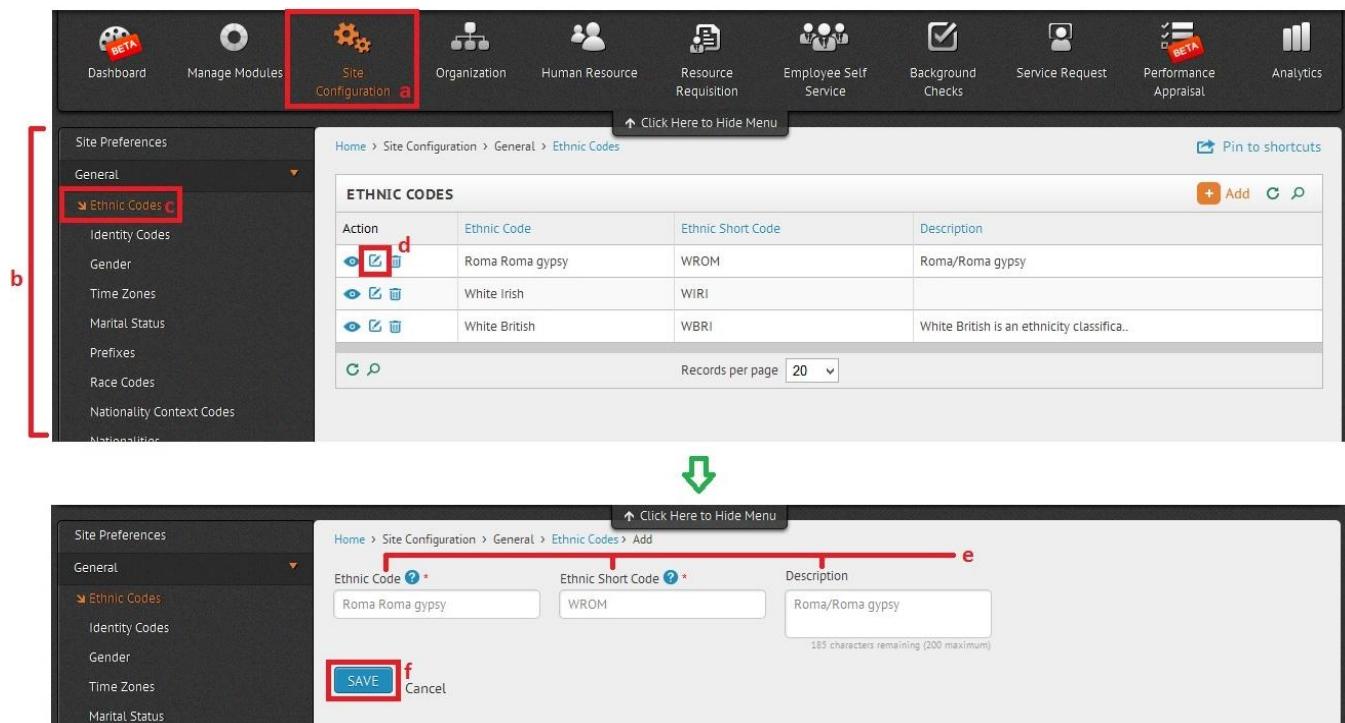
The bottom screenshot shows the 'Add Ethnic Code' form. The left sidebar is identical to the top one. The main form has fields for 'Ethnic Code' (highlighted with a red box 'e') and 'Ethnic Short Code' (highlighted with a red box 'e'). Below these is a text area for 'Description' with a placeholder '200 characters remaining (200 maximum)'. At the bottom are 'SAVE' and 'Cancel' buttons, with 'SAVE' highlighted with a red box 'f'.

Figure 7

## How to Edit Site Configurations within the Application:

- a. Click on Site Configurations in the top menu
- b. The left side panel will display the submenus
- c. Click on the desired submenu
- d. Click on the Edit icon for the record that is to be edited on the right side panel
- e. Make the required changes to the record
- f. Click on Update button to save the changes

For further understanding, refer Figure 8, which explains about editing Ethnic Codes



Site Preferences
General
Home > Site Configuration > General > Ethnic Codes
[Click Here to Hide Menu](#)
[Pin to shortcuts](#)

Action	Ethnic Code	Ethnic Short Code	Description
	Roma Roma gypsy	WROM	Roma/Roma gypsy
	White Irish	WIRI	
	White British	WBRI	White British is an ethnicity classifica..

Records per page: 20

Add

Site Preferences
General
Home > Site Configuration > General > Ethnic Codes > Add
[Click Here to Hide Menu](#)

185 characters remaining (200 maximum)

SAVE

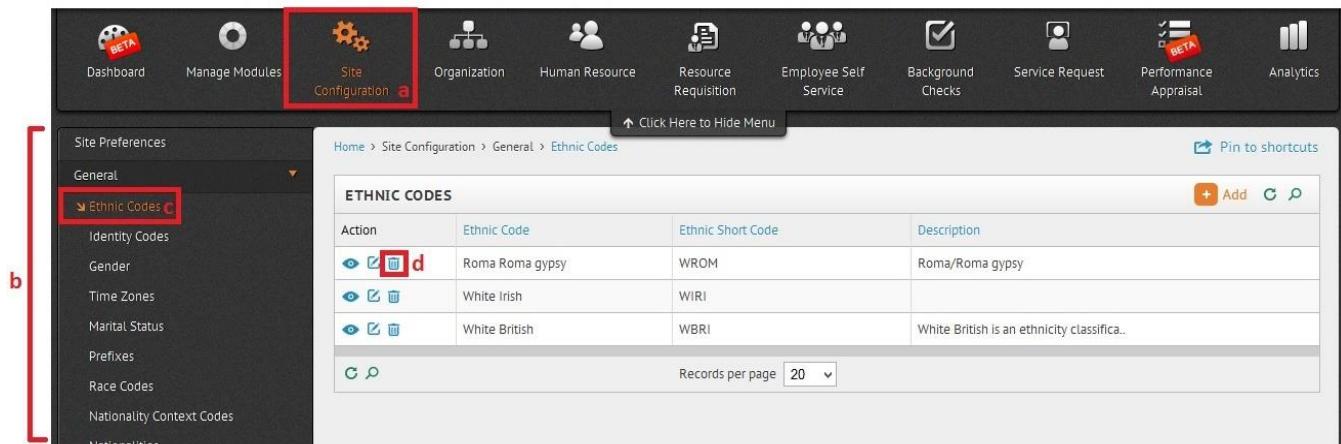
Cancel

Figure 8

## Need to Delete Site Configurations within the Application:

- a. Click on Site Configurations in the top menu
- b. The left side panel will display the submenus
- c. Click on the desired submenu
- d. Click on Delete icon for the record that is to be deleted in the right side panel

For further understanding, refer Figure 9, which explains about deleting Ethnic Codes



Action	Ethnic Code	Ethnic Short Code	Description
	Roma Roma gypsy	WROM	Roma/Roma gypsy
	White Irish	WIRI	
	White British	WBRI	White British is an ethnicity classifica..

Figure 9

- e. In the confirmation popup, click on Yes to delete the record

Refer Figure 10

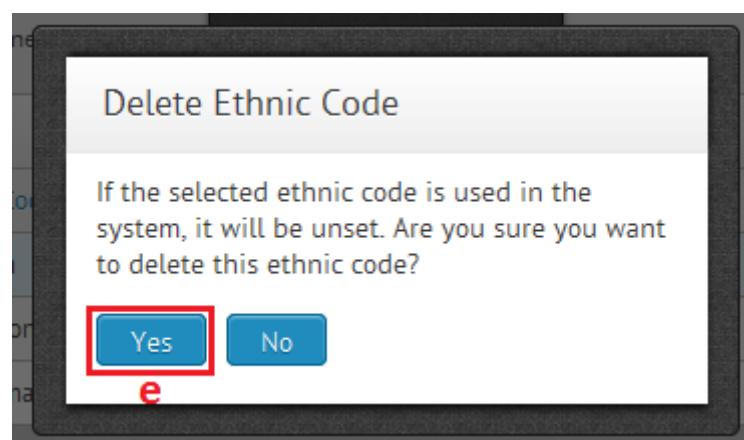
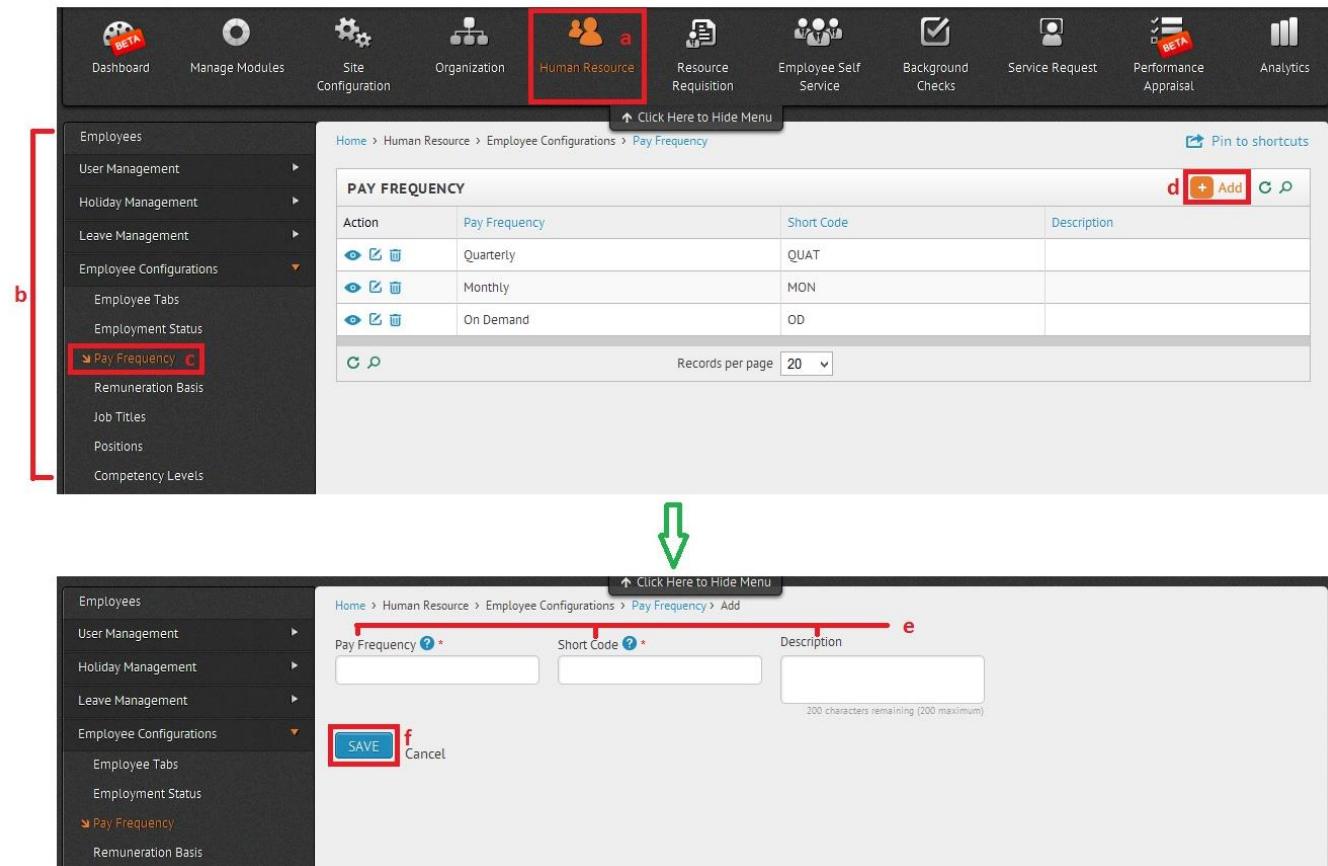


Figure 10

## To Set Employee Configurations:

- a. Click on Human Resource in the top menu
- b. The left side panel will display the submenus
- c. Click on the Employee Configurations in the submenu
- d. Click on the Add button on the right side panel
- e. Enter the required details
- f. Click Save button to save the details

For further understanding, refer Figure 11, which explains about adding Pay Frequency



The figure consists of two screenshots of the Sentrifugo HRMS interface. The top screenshot shows the 'Employee Configurations' list under the 'Employee Configurations' submenu. The 'Pay Frequency' item is highlighted with a red box and labeled 'c'. The bottom screenshot shows the 'Add Pay Frequency' form. The 'Pay Frequency' field is populated with 'Quarterly' and has a red box around it, labeled 'd'. The 'Short Code' field is populated with 'QUAT' and has a red box around it, labeled 'e'. The 'Description' field is empty. Below the form are 'SAVE' and 'Cancel' buttons, with 'SAVE' having a red box around it and labeled 'f'. A large green arrow points from the bottom form back up towards the top list.

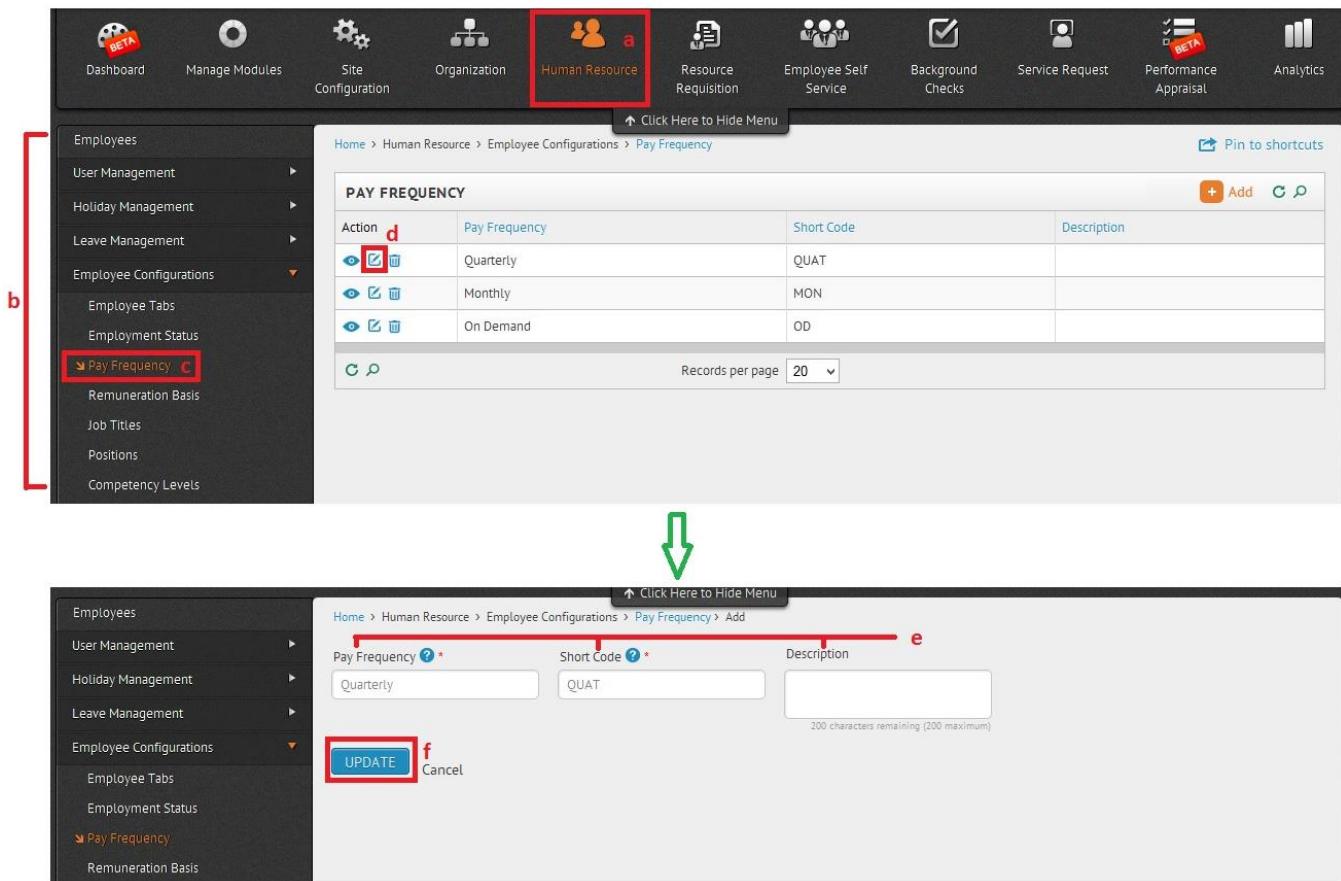
Action	Pay Frequency	Short Code	Description
	Quarterly	QUAT	
	Monthly	MON	
	On Demand	OD	

Figure 11

## To Edit an Employee Configuration:

- a. Click on Human Resource in the top menu
- b. The left side panel will display the submenus
- c. Click on the desired submenu
- d. Click on Edit icon for the record that is to be edited on the right side panel
- e. Make the required changes
- f. Click on Update button to save the changes

For further understanding, refer Figure 12, which explains about editing Pay Frequency



The figure consists of two vertically stacked screenshots of the Sentrifugo HRMS interface.

**Top Screenshot (Pay Frequency List View):**

- Left Panel (b):** Shows the main navigation menu with a red bracket on the left side. The "Employee Configurations" section is expanded, and the "Pay Frequency" option is selected and highlighted with a red box.
- Top Bar:** Shows the "Human Resource" module is active, indicated by a red box around the icon and the word "a".
- Table:** Titled "PAY FREQUENCY", it lists three records:
 

Action	Pay Frequency	Short Code	Description
	Quarterly	QUAT	
	Monthly	MON	
	On Demand	OD	
- Bottom Right:** Buttons for "Add" (+), "Edit" (pencil), and "Delete" (trash).

**Bottom Screenshot (Pay Frequency Add/Edit View):**

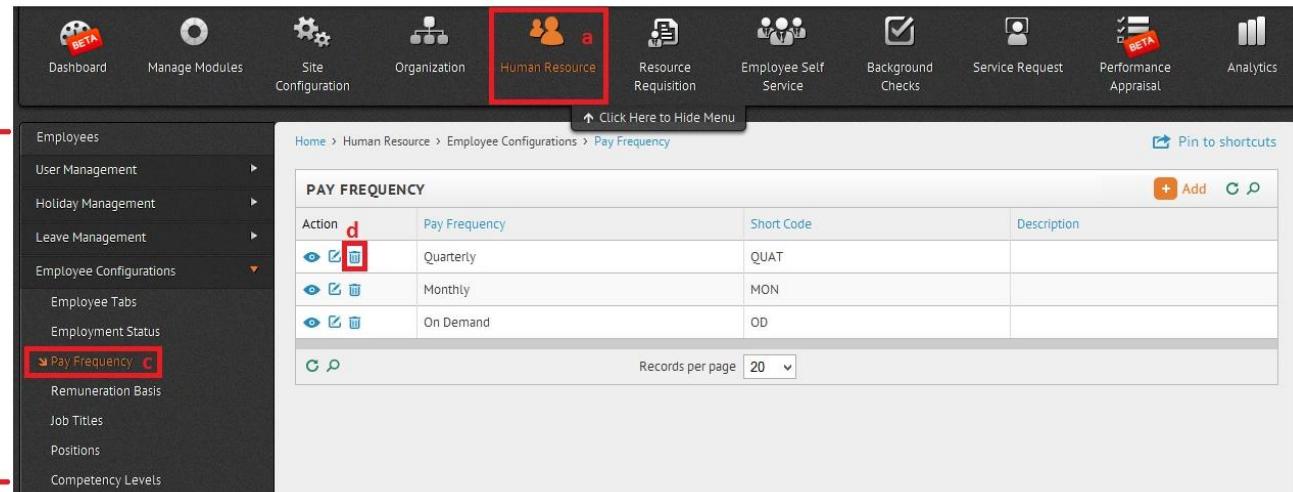
- Left Panel (e):** Shows the same navigation menu as the top screenshot, with the "Pay Frequency" option selected and highlighted with a red box.
- Top Bar:** Shows the "Employee Configurations > Pay Frequency > Add" path.
- Form Fields:**
  - "Pay Frequency" input field with "Quarterly" selected.
  - "Short Code" input field with "QUAT" selected.
  - "Description" text area with placeholder "200 characters remaining (200 maximum)".
- Buttons:** "UPDATE" button (highlighted with a red box) and "Cancel" button.

Figure 12

## To Delete an Employee Configuration:

- a. Click on Human Resource in the top menu
- b. The left side panel will display the submenus
- c. Click on the desired submenu
- d. Click on Delete icon for the record that is to be deleted on the right side panel

For further understanding, refer Figure 13, which explains about deleting Pay Frequency



Action	Pay Frequency	Short Code	Description
	Quarterly	QUAT	
	Monthly	MON	
	On Demand	OD	

Figure 13

- e. In the confirmation popup, click on Yes to delete the record

Refer Figure 14

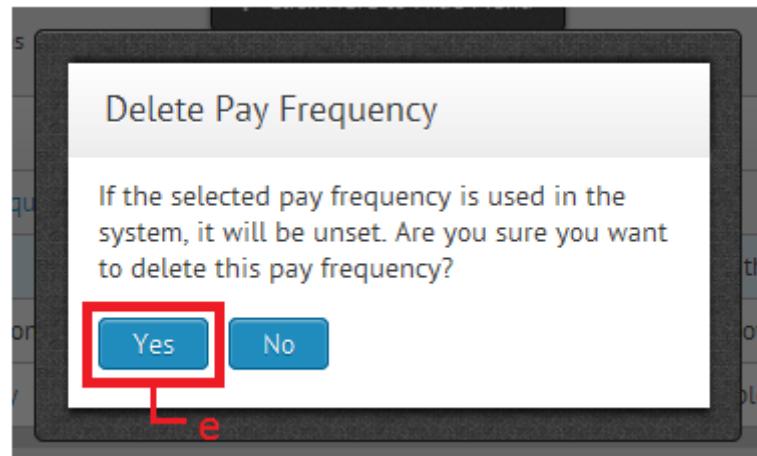
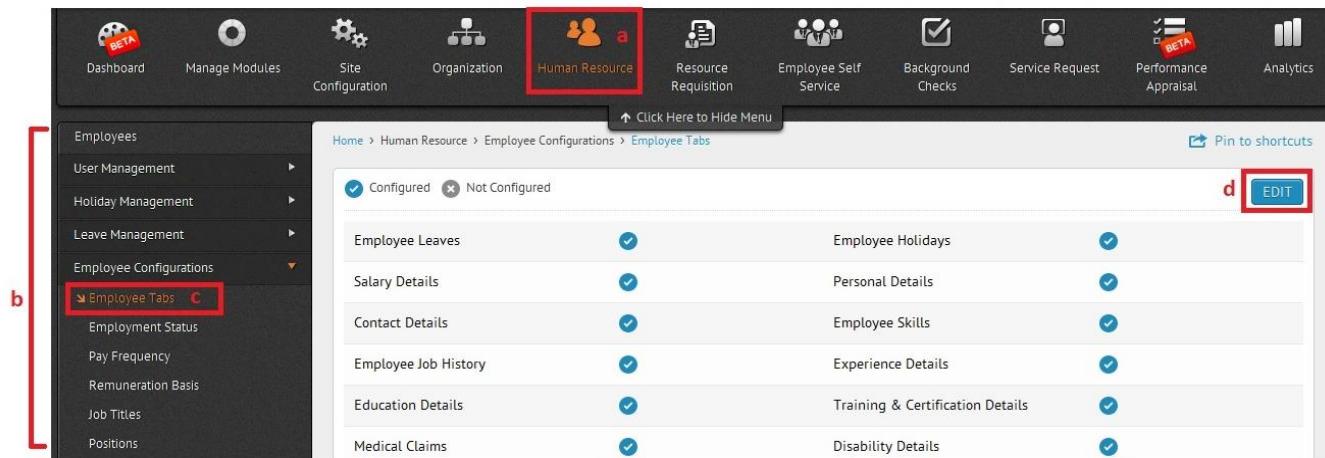


Figure 14

## Want to Configure Tabs for Employees:

- a. Click on Human Resource in the top menu
- b. The left side panel will display the submenus
- c. Click on Employee Tabs
- d. Click on Edit button to configure tabs for employees

Refer Figure 15

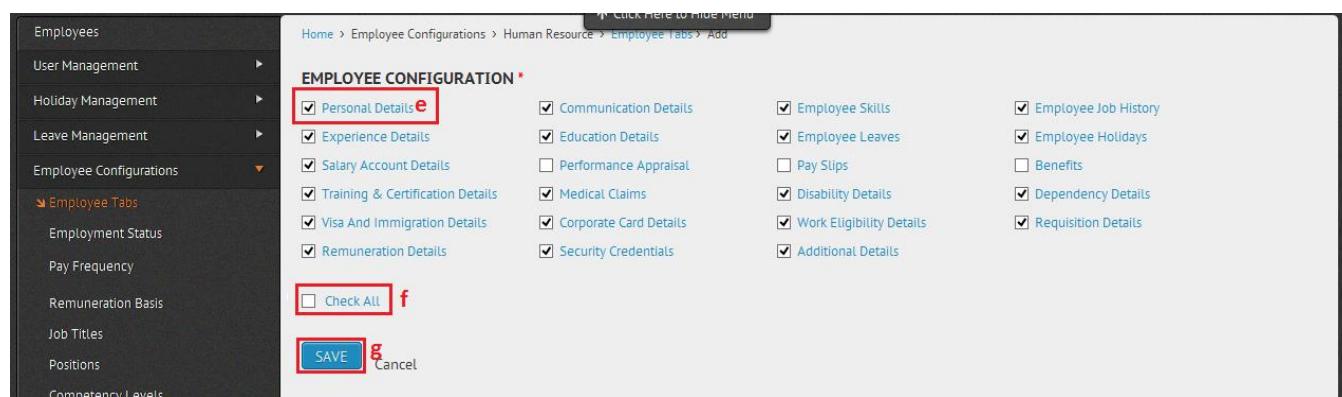


Employee Configuration			
<input checked="" type="checkbox"/> Configured	<input type="checkbox"/> Not Configured		
Employee Leaves	<input checked="" type="checkbox"/>	Employee Holidays	<input checked="" type="checkbox"/>
Salary Details	<input checked="" type="checkbox"/>	Personal Details	<input checked="" type="checkbox"/>
Contact Details	<input checked="" type="checkbox"/>	Employee Skills	<input checked="" type="checkbox"/>
Employee Job History	<input checked="" type="checkbox"/>	Experience Details	<input checked="" type="checkbox"/>
Education Details	<input checked="" type="checkbox"/>	Training & Certification Details	<input checked="" type="checkbox"/>
Medical Claims	<input checked="" type="checkbox"/>	Disability Details	<input checked="" type="checkbox"/>

Figure 15

- e. To enable specific tabs for employees, check individual checkboxes with respect to desired tabs
- f. To enable all the tabs for employees, check “Check All” checkbox
- g. Click on Save to save the changes

Refer Figure 16



**EMPLOYEE CONFIGURATION \***

Personal Details **e**

Experience Details

Salary Account Details

Training & Certification Details

Visa And Immigration Details

Remuneration Details

Check All **f**

**SAVE** **g** Cancel

Figure 16

## Do You Want to Add an Organization:

- a. Click on Organization in the top menu
- b. The left side panel will display the submenus
- c. Click on Organization Info
- d. Click on Click Here link in the right side panel

Refer Figure 17

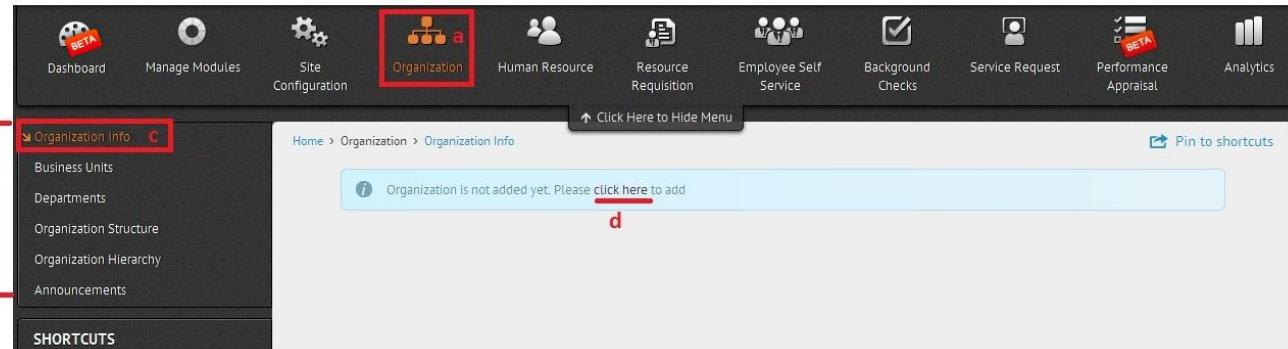
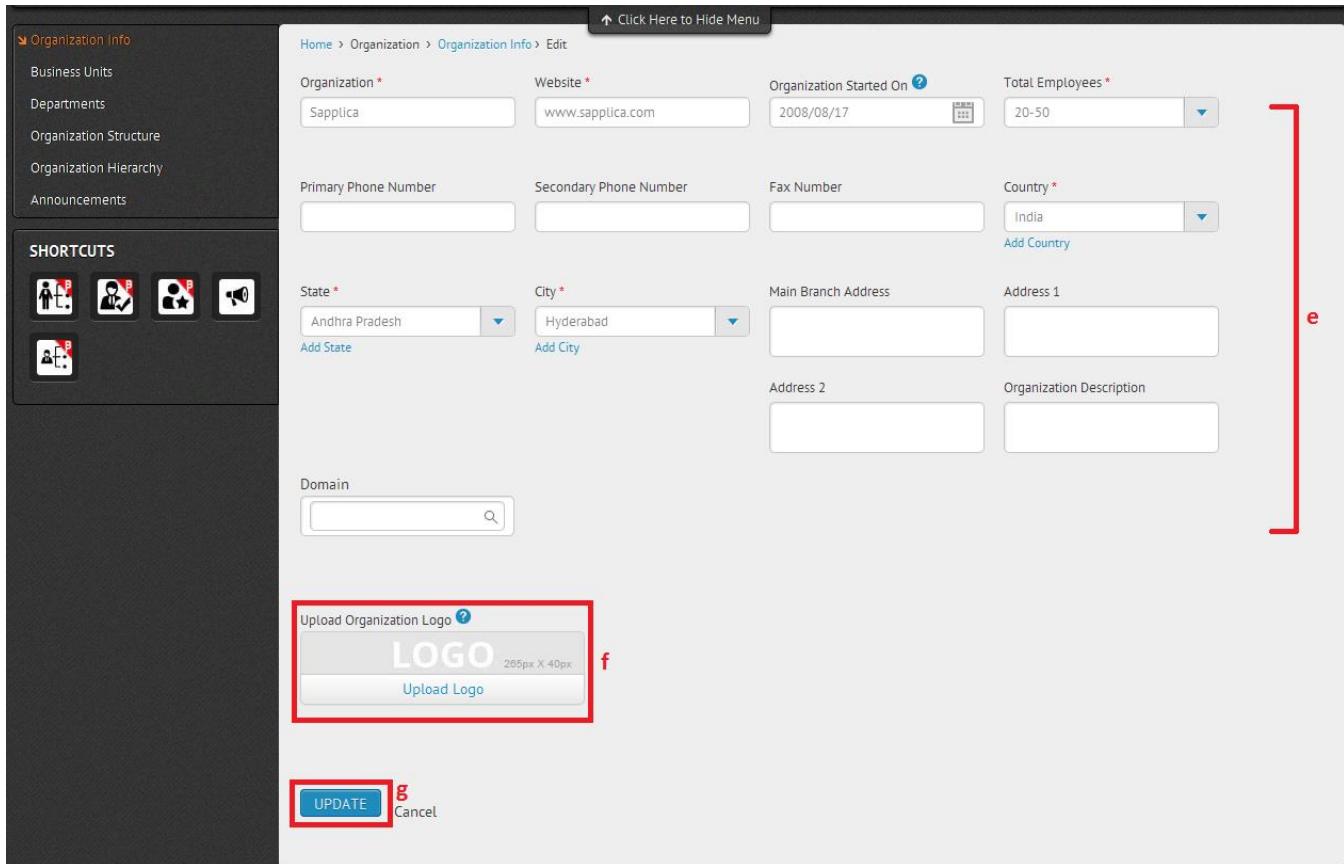


Figure 17

- e. Enter the required details
- f. Upload your organization logo
- g. Click on Save to add the organization

Refer Figure 18



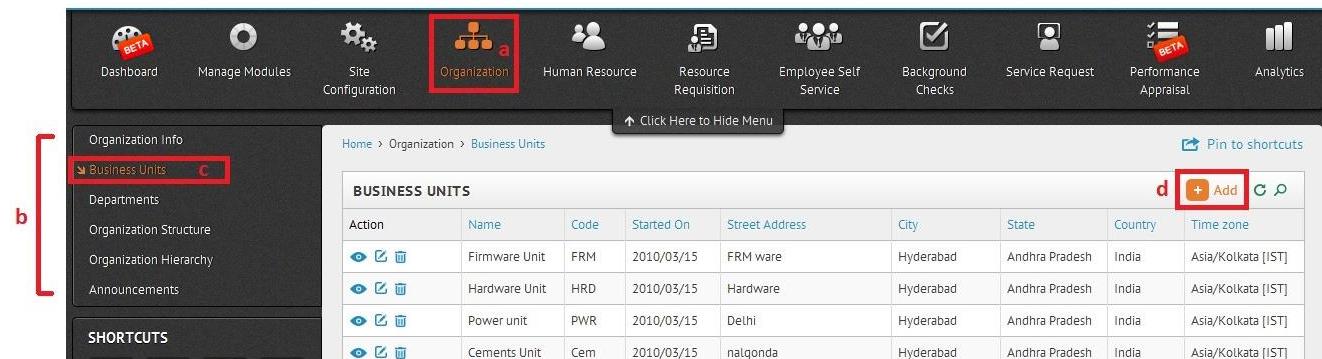
The screenshot shows the 'Organization Info' page in the Sentrifugo HRMS system. The left sidebar contains links for Business Units, Departments, Organization Structure, Organization Hierarchy, and Announcements. The main content area has tabs for Home, Organization, Organization Info, and Edit. The current view is 'Edit'. The page includes fields for Organization (Sapplica), Website (www.sapplica.com), Organization Started On (2008/08/17), Total Employees (20-50), Primary Phone Number, Secondary Phone Number, Fax Number, Country (India), State (Andhra Pradesh), City (Hyderabad), Main Branch Address, Address 1, Address 2, Organization Description, and Domain. A search bar for the domain is also present. A red bracket labeled 'e' covers the entire form area. A red box labeled 'f' highlights the 'Upload Organization Logo' section, which includes a placeholder 'LOGO 285px X 40px', an 'Upload Logo' button, and a 'Cancel' link. Below this is a blue 'UPDATE' button.

Figure 18

## How to Add Business Units:

- Click on Organization in the top menu
- The left side panel will display the submenus
- Click on Business Units
- Click on Add button on the right side panel

Refer Figure 19

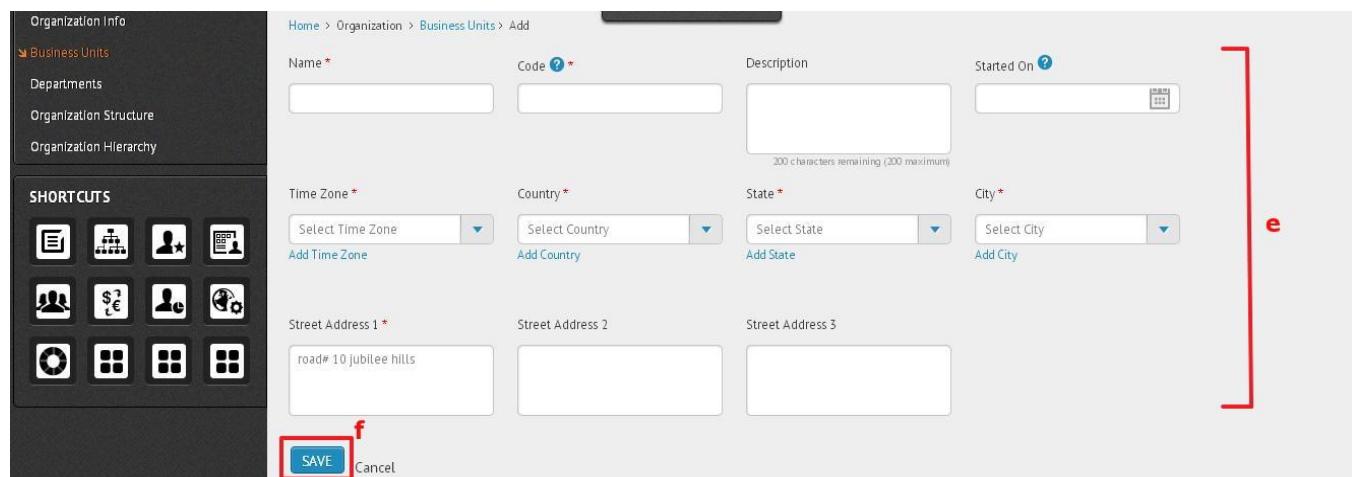


Action	Name	Code	Started On	Street Address	City	State	Country	Time zone
	Firmware Unit	FRM	2010/03/15	FRM ware	Hyderabad	Andhra Pradesh	India	Asia/Kolkata [IST]
	Hardware Unit	HRD	2010/03/15	Hardware	Hyderabad	Andhra Pradesh	India	Asia/Kolkata [IST]
	Power unit	PWR	2010/03/15	Delhi	Hyderabad	Andhra Pradesh	India	Asia/Kolkata [IST]
	Cements Unit	Cem	2010/03/15	nalgonda	Hyderabad	Andhra Pradesh	India	Asia/Kolkata [IST]

Figure 19

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

Refer Figure 20



Organization Info

Business Units

Departments

Organization Structure

Organization Hierarchy

SHORTCUTS

Name \*      Code ? \*      Description      Started On ?

Time Zone \*      Country \*      State \*      City \*

Street Address 1 \*      Street Address 2      Street Address 3

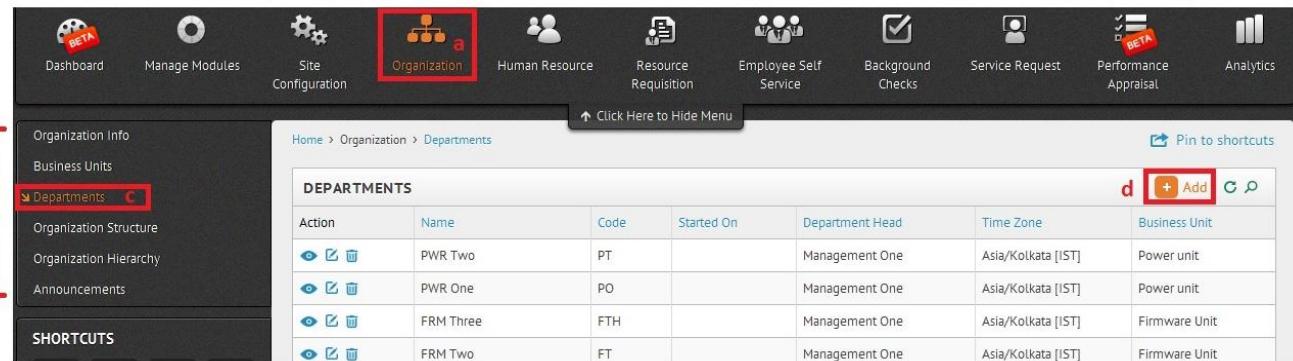
**SAVE** Cancel

Figure 20

## Steps to Add Departments:

- a. Click on Organization in the top menu
- b. The left side panel will display the submenus
- c. Click on Departments
- d. Click on Add button on the right side panel

Refer Figure 21



Action	Name	Code	Started On	Department Head	Time Zone	Business Unit
	PWR Two	PT		Management One	Asia/Kolkata [IST]	Power unit
	PWR One	PO		Management One	Asia/Kolkata [IST]	Power unit
	FRM Three	FTH		Management One	Asia/Kolkata [IST]	Firmware Unit
	FRM Two	FT		Management One	Asia/Kolkata [IST]	Firmware Unit

Figure 21

- e. Enter the necessary details
- f. Click on Save button to save the Department

Refer Figure 22

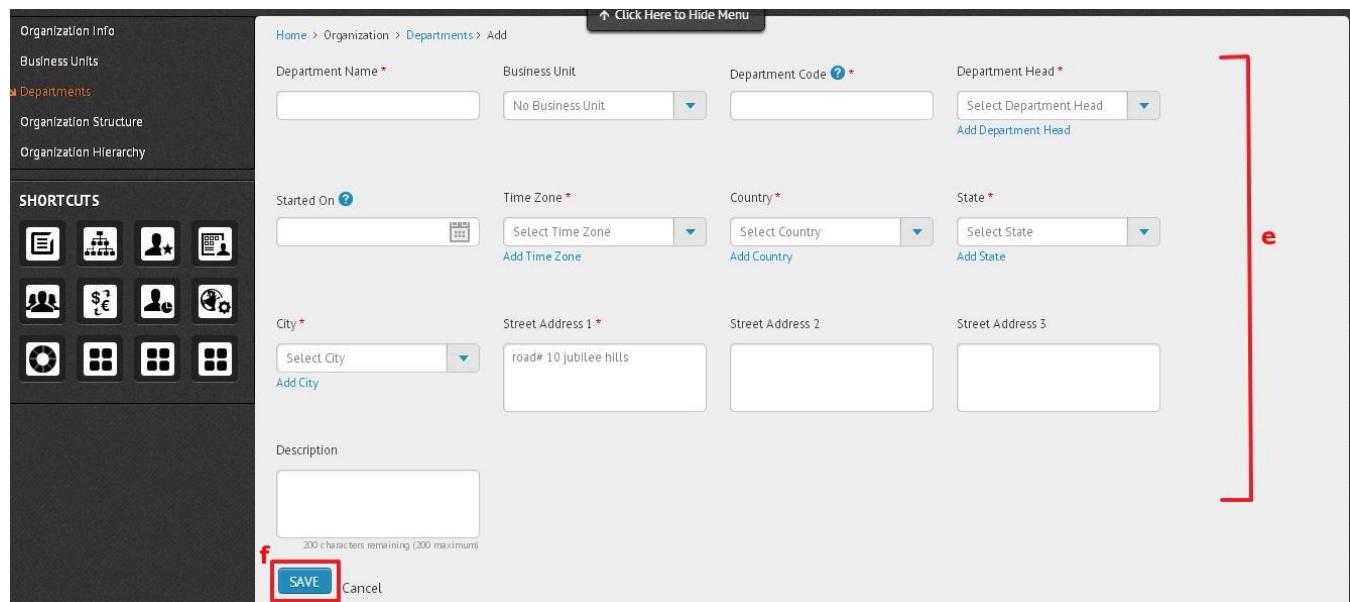


Figure 22

## How do I Set Site Preferences:

- a. Click on Site Configuration in the top menu
- b. The left side panel will display the sub menus
- c. Click on Site Preferences
- d. Click on Click Here in the right side panel

Refer Figure 23

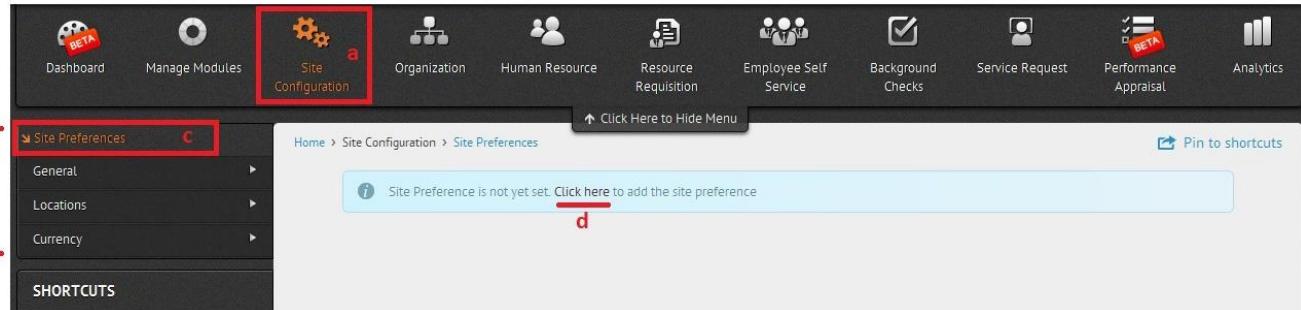
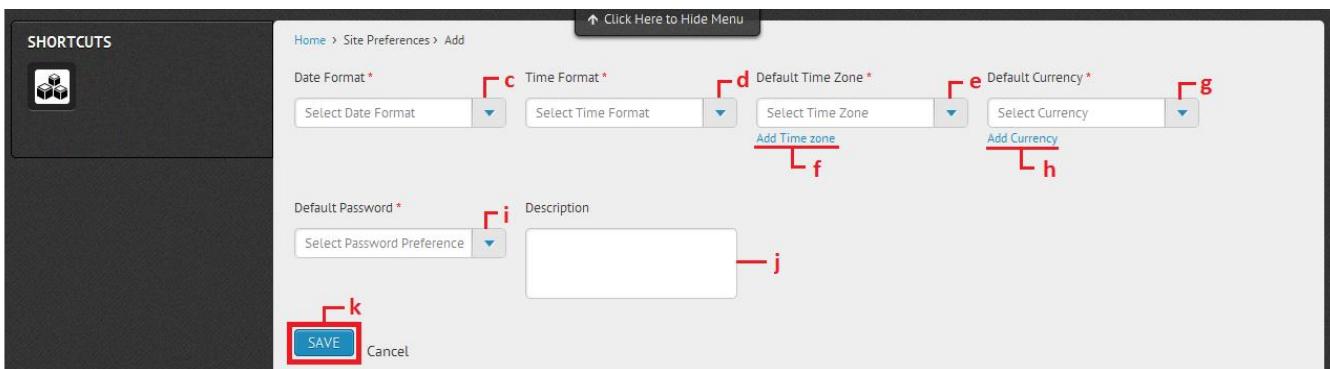


Figure 23

- e. Select date format in the Date Format dropdown
- f. Select time format in the Time Format dropdown
- g. Select time zone in the Default Time Zone dropdown
- h. If the desired time zone is unavailable in the dropdown, click on Add Time Zone link to add the time zone
- i. Select currency in the Default Currency dropdown
- j. If the desired currency is unavailable in the dropdown, click on Add Currency link to add the currency
- k. Select a password format from Default Password dropdown
- l. Provide description, if necessary
- m. Click on Save button to add the site preferences

Refer Figure 24



The screenshot shows the 'Add' form for Site Preferences. The form includes the following fields and buttons, each labeled with a red box and letter:

- Date Format \* (dropdown labeled 'c')
- Time Format \* (dropdown labeled 'c')
- Default Time Zone \* (dropdown labeled 'd') with an 'Add Time zone' link below it (labeled 'f')
- Default Currency \* (dropdown labeled 'e') with an 'Add Currency' link below it (labeled 'h')
- Default Password \* (dropdown labeled 'g')
- Description (text input field labeled 'j')
- SAVE button (labeled 'k')
- Cancel button

Figure 24

## How to Activate and In-active Modules:

- a. Click on Manage Modules in the top menu
- b. All the modules are displayed in a circular representation
- c. Click on the icon of a module to make it active or in-active
- d. Click on Save button to save the changes made to the modules

Refer Figure 25

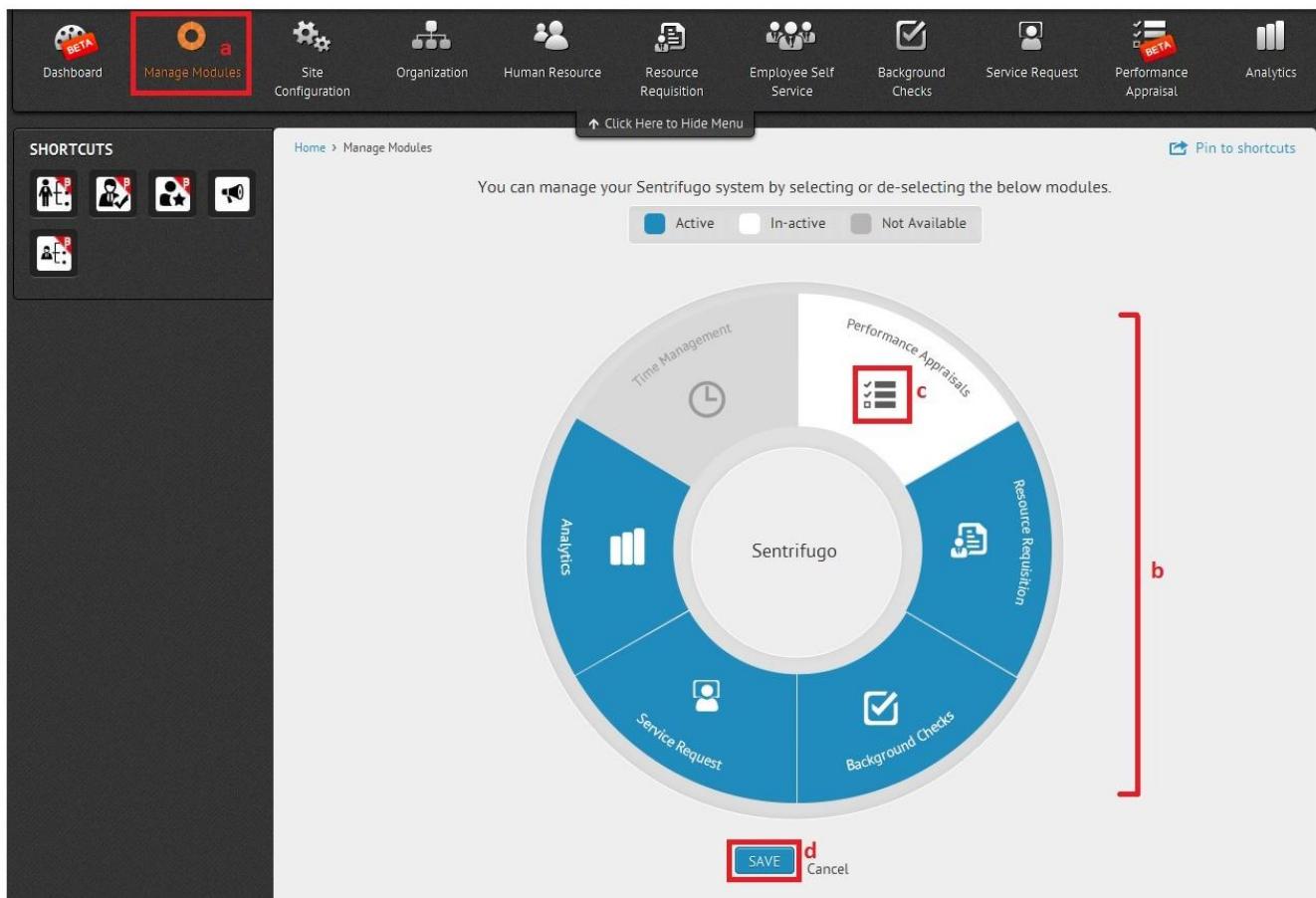


Figure 25

## Do you want to Add Roles & Privileges:

- a. Click on User Management in the top menu
- b. The left side panel will display the submenus
- c. Click on Roles & Privileges
- d. Click on Add button in the right side panel

Refer Figure 26



The screenshot shows the Sentrifugo HRMS interface. At the top, there is a navigation bar with various icons and links: Dashboard (BETA), Manage Modules, Site Configuration, Organization, Human Resource (highlighted with a red box and labeled 'a'), Resource Requisition, Employee Self Service, Background Checks, Service Request, Performance Appraisal (BETA), and Analytics. Below the navigation bar is a left sidebar with sections for Employees, User Management (with 'Roles & Privileges' highlighted with a red box and labeled 'c'), Manage External Users, Holiday Management, Leave Management, and Employee Configurations. There is also a SHORTCUTS section. In the center, there is a breadcrumb trail: Home > Human Resource > User Management > Roles & Privileges. The main content area is titled 'ROLES & PRIVILEGES' and contains a table with the following data:

Action	Role Name	Role Type	Role Description	Group
	Management	Management		Management
	Employee	Employee		Employees
	HR Manager	HRManager		HR
	Manager	Manager		Manager
	Executive	Executive		Employees

At the top right of the main content area, there are buttons for '+ Add' (highlighted with a red box and labeled 'd'), 'Pin to shortcuts', and search/cancel.

Figure 26

- e. In the Add page, select a role group
- f. Enter the role name, role type and role description if necessary
- g. Check the checkboxes against the necessary menu item(s)
- h. Upon checking the checkbox, Add, Edit, Delete and View privileges respective to the selected menu item will be displayed
- i. Check the checkboxes against the privileges to assign them to the role
- j. Click on Save button to add the role

Refer Figure 27

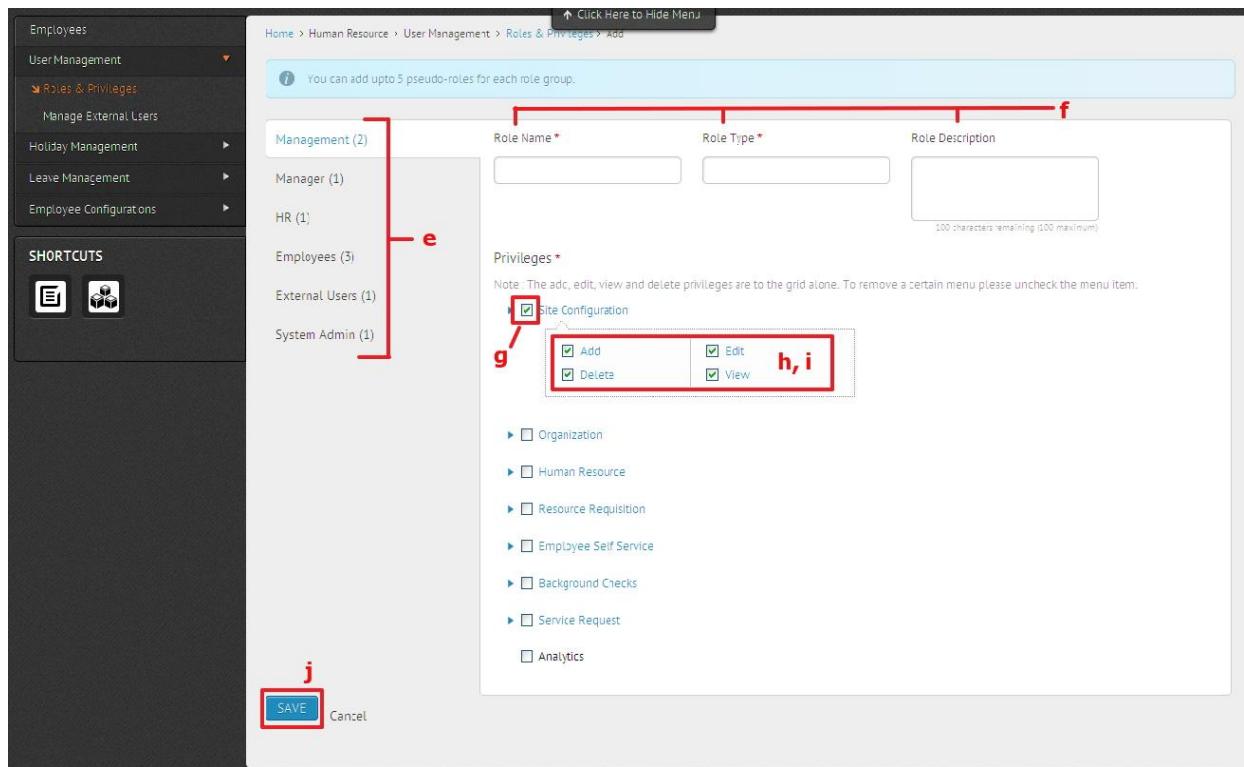


Figure 27

## How do I Add an External User:

- Click on Human Resource in the top menu
- The left side panel will display the submenus
- Click on Manage External Users under User Management
- Click on Add button in the right side panel

Refer Figure 28

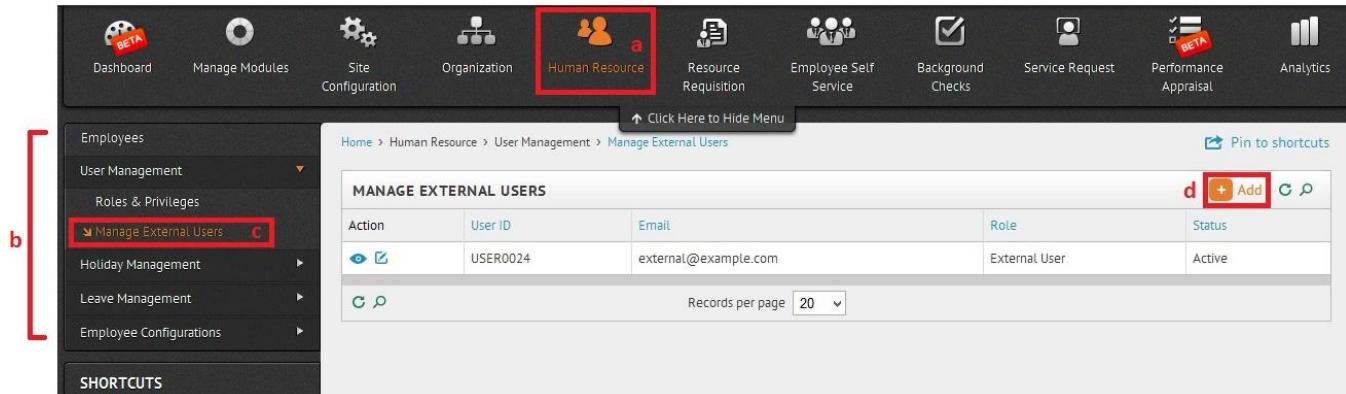


Figure 28

- Click on Configure Identity Codes to add the identity code for users
- Enter the Full Name
- Enter the Email
- Select a role in Assign a Role dropdown
- Provide comments if necessary
- Click on Save to add an external user

Refer Figure 29



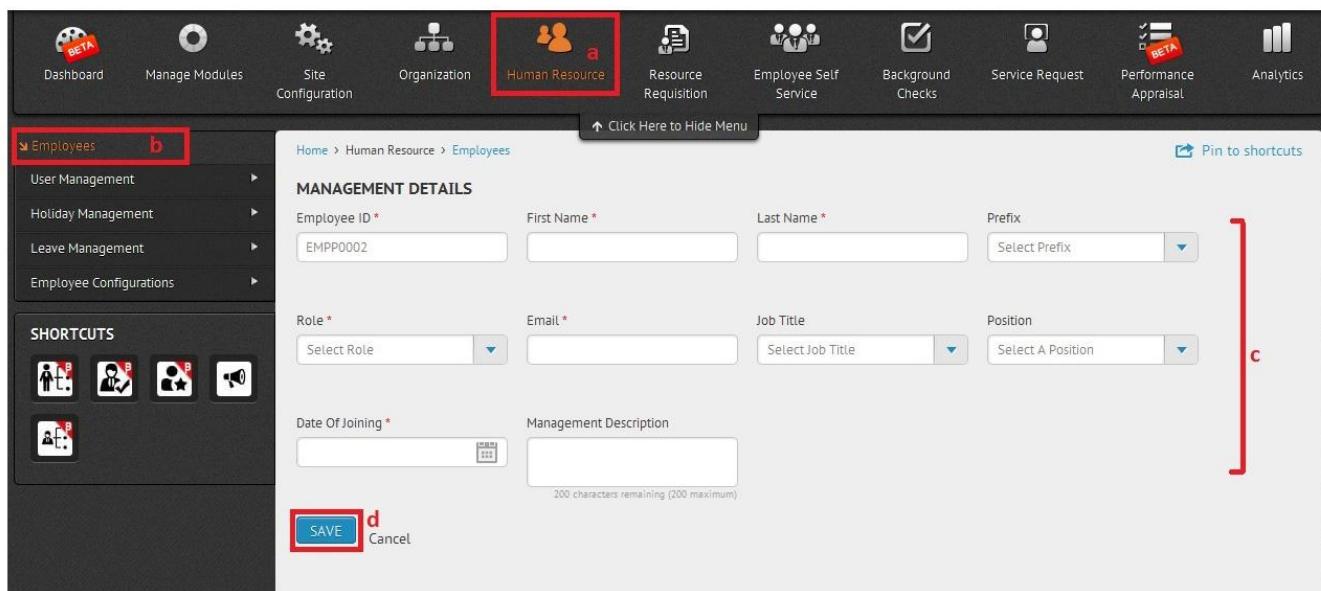
Figure 29

## How do I Add an Employee:

Gathering Management Details is an important aspect of an organization. Using Sentrifugo, obtaining the management details is simple. Upon usage of the application for the first time, the management details are acquired right before adding employees to the organization.

- a. Click on Human Resources in the top menu
- b. Click on Employees submenu on the left side panel
- c. Enter the management details
- d. Click on Save to capture management details

Refer Figure 30



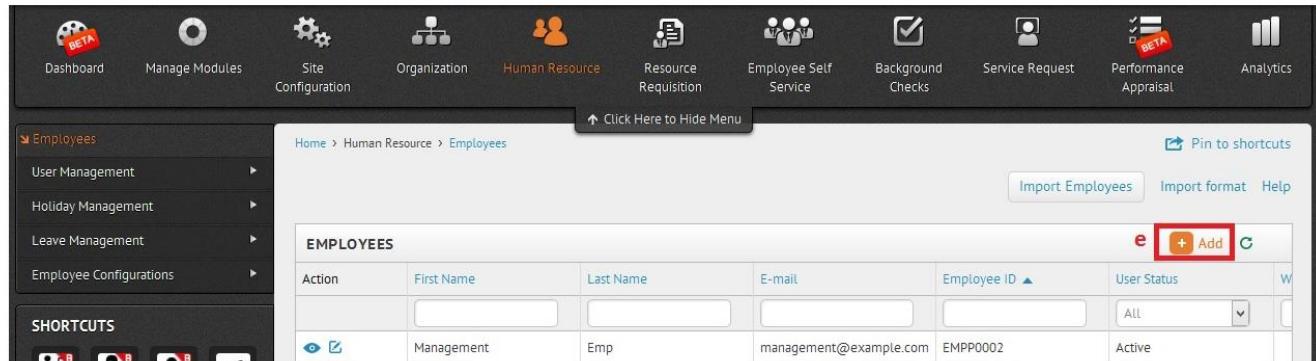
The screenshot shows the Sentrifugo HRMS interface. At the top, there's a navigation bar with various modules like Dashboard, Manage Modules, Site Configuration, Organization, Human Resource (which is highlighted with a red box 'a'), Resource Requisition, Employee Self Service, Background Checks, Service Request, Performance Appraisal, and Analytics. Below the navigation bar is a left sidebar with a 'BETA' badge. It has a 'Employees' section (highlighted with a red box 'b') containing sub-options: User Management, Holiday Management, Leave Management, and Employee Configurations. To the right of the sidebar is the main content area. The content area title is 'MANAGEMENT DETAILS'. It contains several input fields: 'Employee ID \*' (with value 'EMPP0002'), 'First Name \*', 'Last Name \*', 'Prefix' (with dropdown 'Select Prefix'), 'Role \*' (with dropdown 'Select Role'), 'Email \*', 'Job Title' (with dropdown 'Select Job Title'), 'Position' (with dropdown 'Select A Position'), 'Date Of Joining \*' (with date picker), and 'Management Description' (with a text area and note '200 characters remaining (200 maximum)'). At the bottom left of the content area is a blue 'SAVE' button (highlighted with a red box 'd') and a 'Cancel' link. Above the content area, there's a breadcrumb trail: Home > Human Resource > Employees. There are also 'Click Here to Hide Menu' and 'Pin to shortcuts' buttons.

Refer Figure 30

After the management details are gathered, the privilege to add employees to the application will be enabled.

- e. Click on Add button in the right side panel

Refer Figure 31



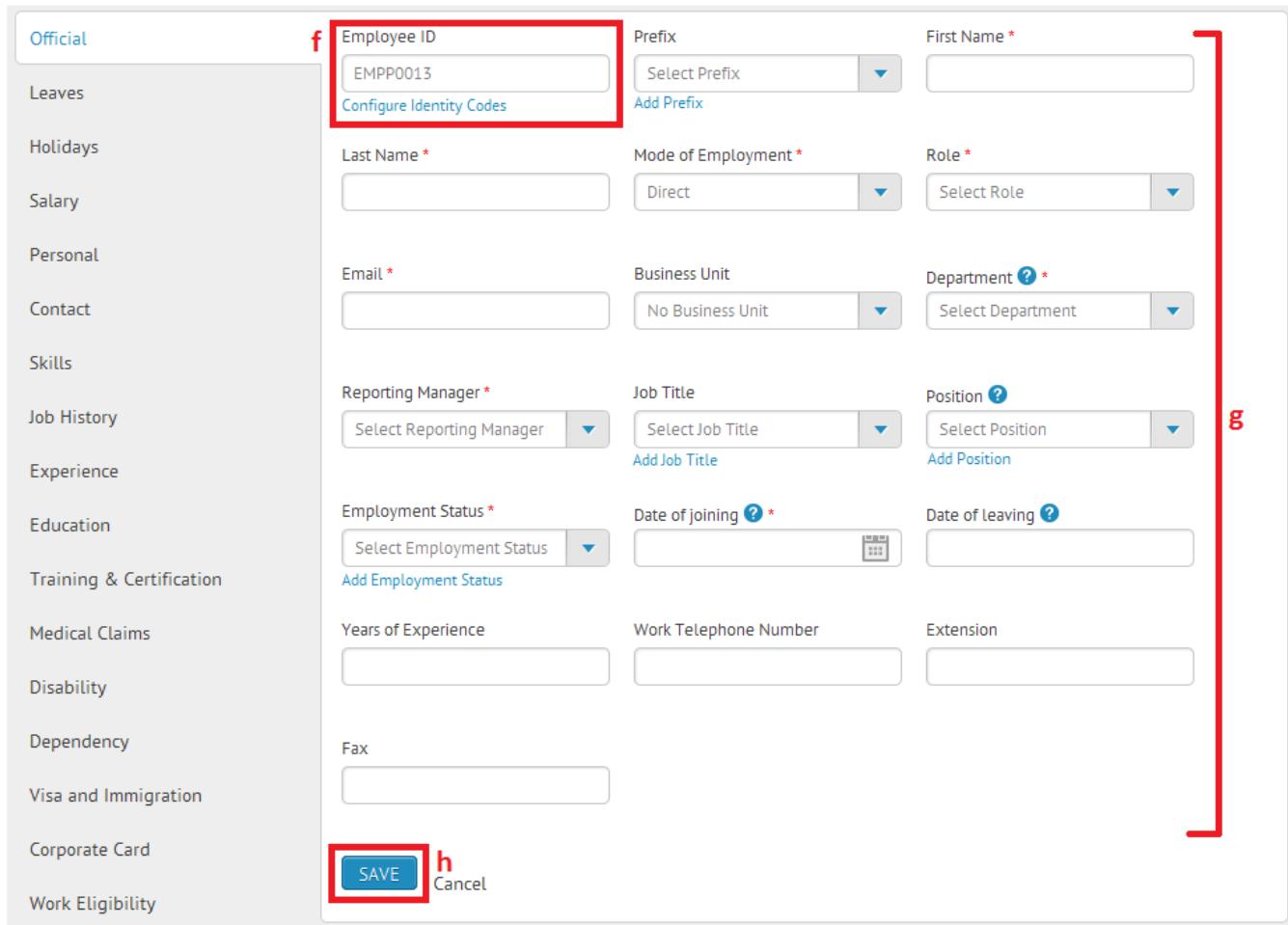
Action	First Name	Last Name	E-mail	Employee ID	User Status
	Management	Emp	management@example.com	EMPP0002	Active

Figure 31

- f. The Employee ID will be auto populated by the application

- g. Enter the details respective to the employee  
 h. Click on Save to add the employee

Refer Figure 32



**Official**

Leaves

Holidays

Salary

Personal

Contact

Skills

Job History

Experience

Education

Training & Certification

Medical Claims

Disability

Dependency

Visa and Immigration

Corporate Card

Work Eligibility

**f** Employee ID  
EMPP0013  
Configure Identity Codes

Prefix  
Select Prefix  
Add Prefix

Last Name \*  
First Name \*

Mode of Employment \*  
Role \*

Email \*  
Business Unit  
No Business Unit

Department ? \*  
Select Department

Reporting Manager \*  
Select Reporting Manager

Job Title  
Select Job Title  
Add Job Title

Position ?  
Select Position  
Add Position

Employment Status \*  
Select Employment Status  
Add Employment Status

Date of joining ? \*  
Date of leaving ?

Years of Experience  
Work Telephone Number  
Extension

Fax

**h** SAVE Cancel

Figure 32

## How can I Update My Details:

- Click on Employee Self-Service in the top menu
- Click on My Details in the submenu on the left side panel
- In the right side panel, click on Add to add the Contact Number

Refer Figure 33



Figure 33

- In the popup, enter the Contact Number
- Click on Ok to add the Contact Number to My Details

Refer Figure 34

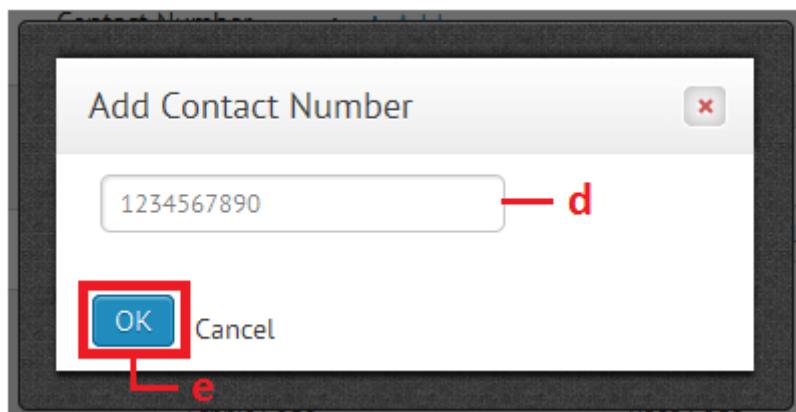
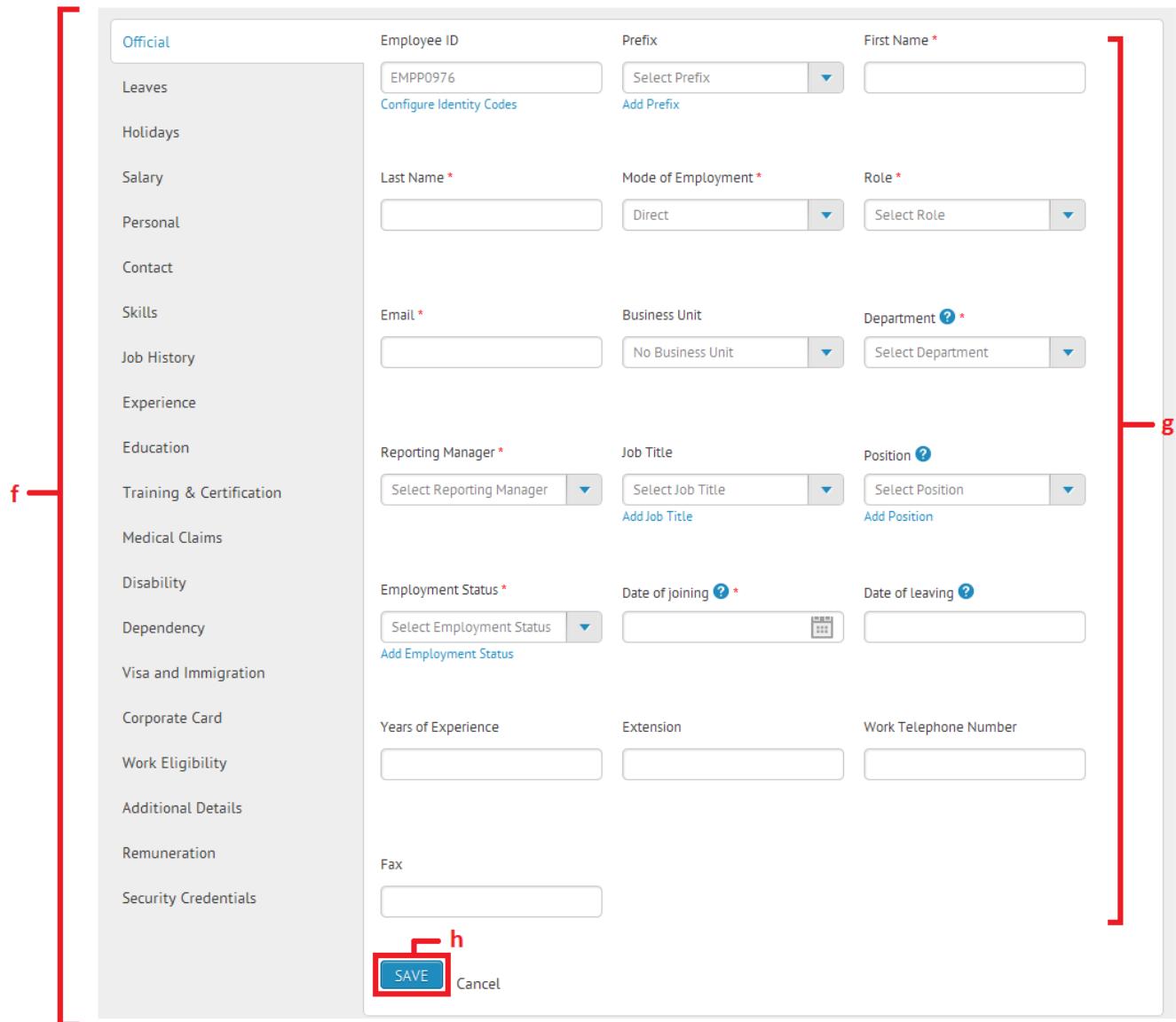


Figure 34

- f. Click on the desired tab in the right side panel to add or edit details
- g. Click on Edit in the respective screen to add or edit the details
- h. Click on Save to add or update the details

Refer Figure 35



The screenshot shows the 'Official' tab selected in the left sidebar of the Sentrifugo HRMS application. The main form contains various input fields and dropdown menus for employee information. Red annotations are present: 'f' points to the 'Leaves' tab in the sidebar; 'g' points to the 'SAVE' button at the bottom left of the form; and 'h' points to the 'Cancel' button at the bottom right of the form.

Section	Field / Option	Description
Employee ID	EMPP0976	Employee ID input field
Prefix	Select Prefix	Prefix dropdown menu
First Name *		First Name input field
Leaves	Configure Identity Codes	Link to configuration page
Holidays		
Salary	Last Name *	Last Name input field
Personal	Mode of Employment *	Mode of Employment dropdown menu
Contact	Role *	Role dropdown menu
Skills	Email *	Email input field
Job History	Business Unit	Business Unit dropdown menu
Experience	Department ? *	Department dropdown menu
Education	Reporting Manager *	Reporting Manager dropdown menu
Training & Certification	Job Title	Job Title dropdown menu
Medical Claims	Position ?	Position dropdown menu
Disability	Select Employment Status	Select Employment Status dropdown menu
Dependency	Date of joining ? *	Date of joining input field
Visa and Immigration	Add Employment Status	Link to add employment status
Corporate Card	Date of leaving ?	Date of leaving input field
Work Eligibility	Years of Experience	Years of Experience input field
Additional Details	Extension	Extension input field
Remuneration	Work Telephone Number	Work Telephone Number input field
Security Credentials	Fax	Fax input field
<input type="button" value="SAVE"/> <input type="button" value="Cancel"/>		

Figure 35

## How to Add Employee Documents:

All the essential documents pertaining to an employee can be made available in Sentrifugo. These documents are added by the employee, HR and super admin. The managers can view the documents of their team members

For employees to add documents:

- a. Click on Employee Self Service in the header
- b. Click on My Details in the left side menu
- c. Click on Document
- d. Click on New Document
- e. Enter the Document Name
- f. Click on Save to save the details
- g. These documents can be edited, deleted and downloaded

Refer Figure 36

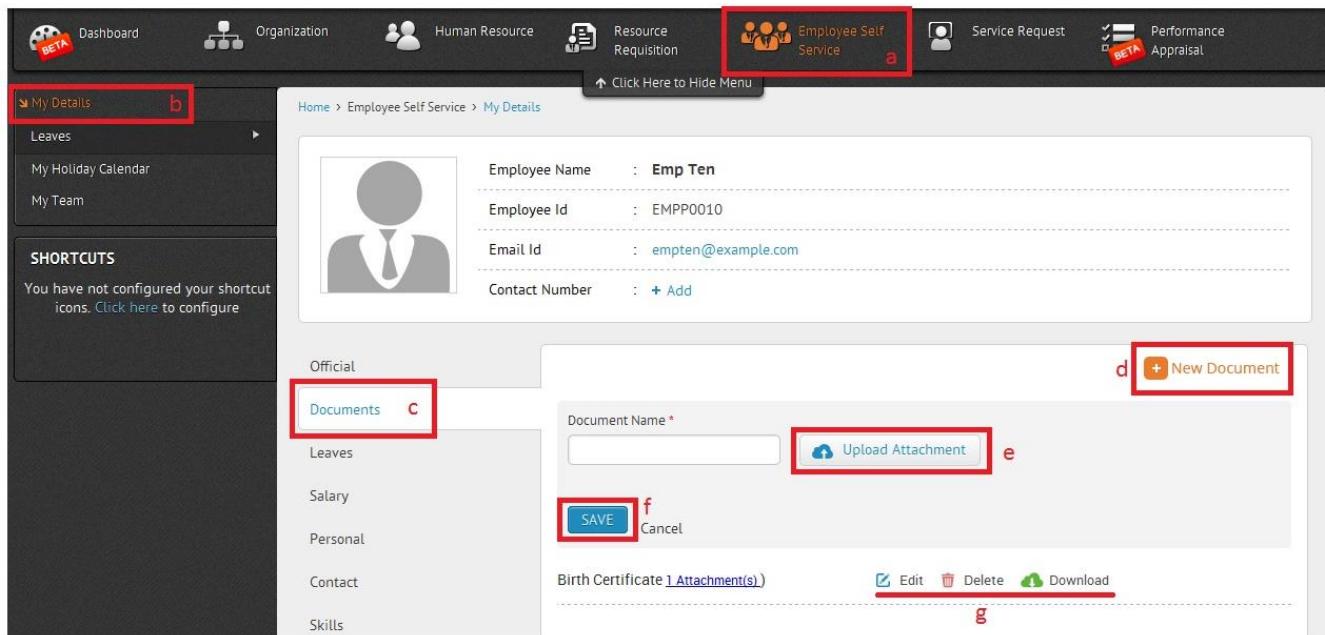
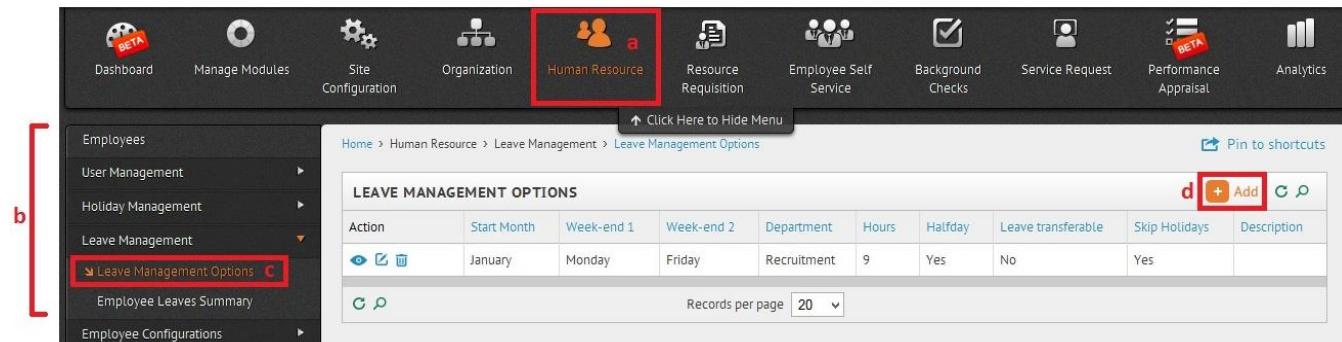


Figure 36

## Want to Add Leave Management Options:

- a. Click on Human Resources in the top menu
- b. The left side panel will display the submenus
- c. Click on Leave Management Options
- d. Click on Add button in the right side panel

Refer Figure 37

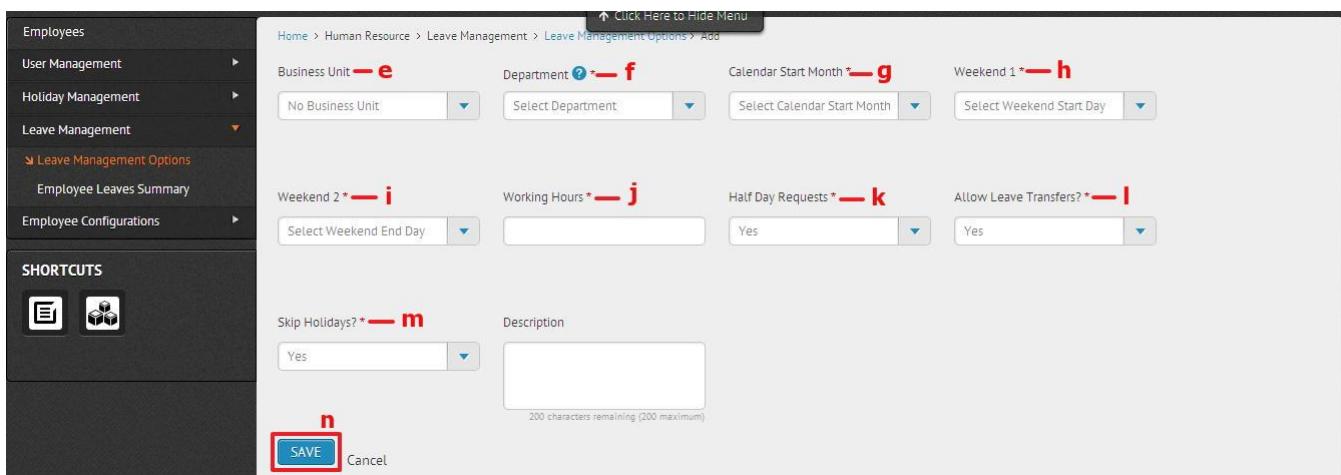


Action	Start Month	Week-end 1	Week-end 2	Department	Hours	Halfday	Leave transferable	Skip Holidays	Description
	January	Monday	Friday	Recruitment	9	Yes	No	Yes	

Figure 37

- e. Select a business unit from Business Unit dropdown
- f. Select a department from department dropdown
- g. Select month from Calendar Start Month dropdown
- h. Select weekend1 from Weekend1 dropdown
- i. Select weekend2 from Weekend2 dropdown
- j. Enter number of working hours
- k. Provide permissions for Half Day Requests
- l. Provide permissions to Allow Leave Transfers
- m. Provide permissions to Skip Holidays
- n. Click Save button to add leave management options for department

Refer Figure 38



The screenshot shows the 'Leave Management Options' configuration page. The left sidebar has 'Leave Management Options' expanded, showing 'Employee Leaves Summary' and 'Employee Configurations'. The main form has the following fields:

- Business Unit** (e): No Business Unit selected.
- Department** (f): Select Department dropdown.
- Calendar Start Month** (g): Select Calendar Start Month dropdown.
- Weekend 1** (h): Select Weekend Start Day dropdown.
- Weekend 2** (i): Select Weekend End Day dropdown.
- Working Hours** (j): Working Hours input field.
- Half Day Requests** (k): Yes dropdown.
- Allow Leave Transfers** (l): Yes dropdown.
- Skip Holidays** (m): Yes dropdown.
- Description**: A text area with a character limit of 200 characters.

A red box highlights the **SAVE** button at the bottom left, which is labeled 'n'.

Figure 38

## What if I want to Apply a Leave Request:

- a. Click on Employee Self-Service in the top menu
- b. The left side panel will display the submenus
- c. Click on Leave Request
- d. The current month calendar will be displayed on the right side panel
- e. Click on previous and after arrow buttons to move to previous or next month
- f. Click on the day you want to apply for leave to apply leave for one day

For further understanding, Refer Figure 39, which explain about adding leaves for the month of September

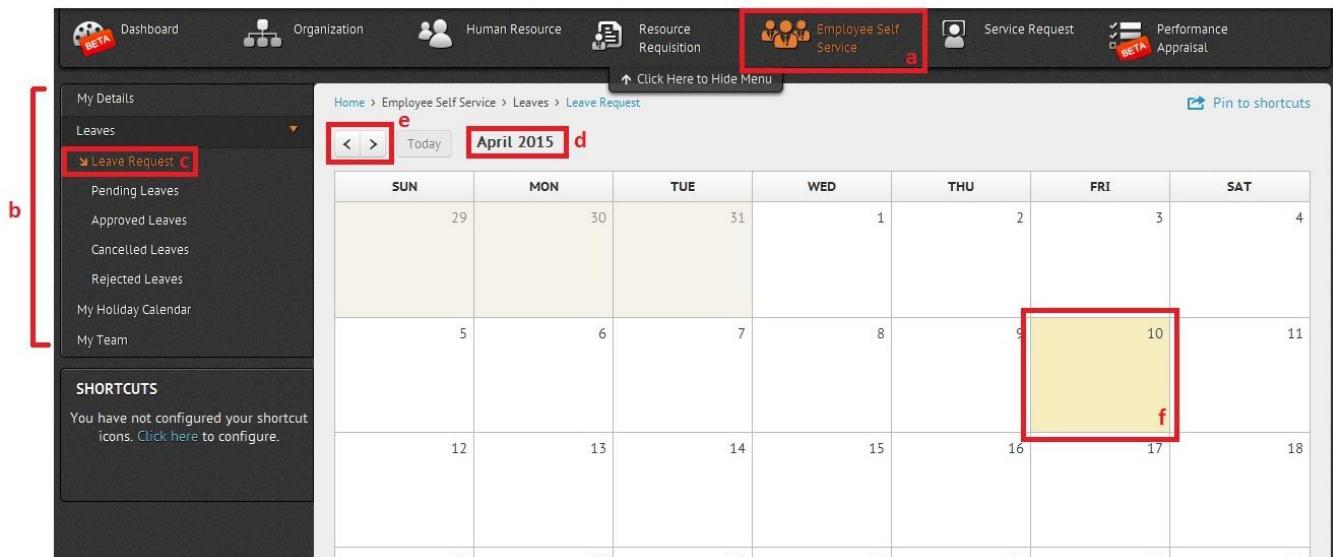


Figure 39

- g. To apply leave for consecutive days, drag the mouse on the calendar for desired number of days

Refer Figure 40

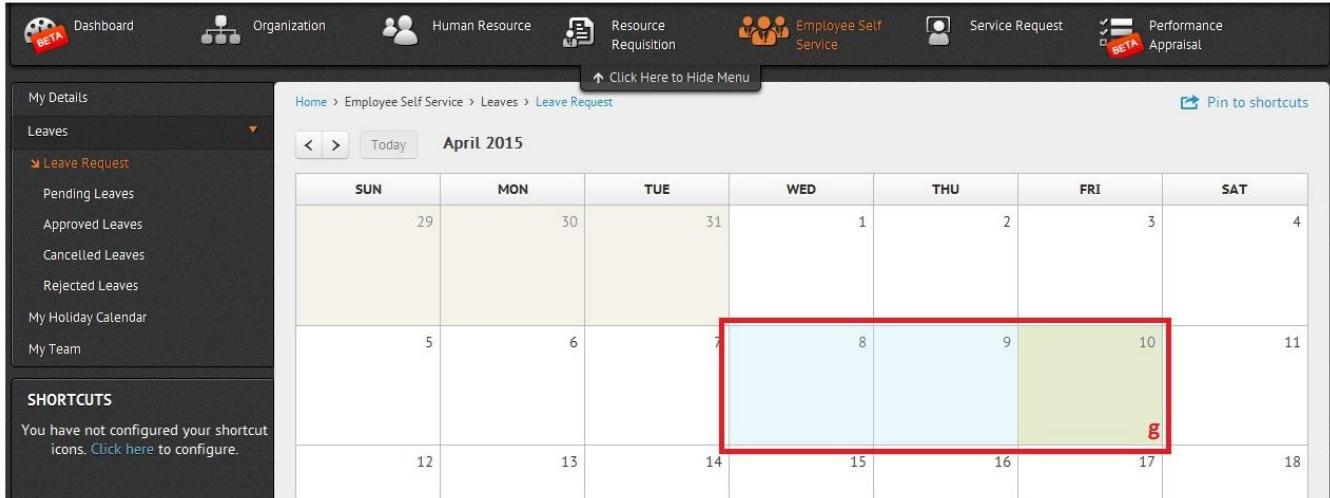


Figure 40

- h. In the popup, enter the required details  
 i. Click on Apply to apply for leave(s)

Refer Figure 41

**Create: Leave Request**

Available Leaves *	Reason *	Leave Type *
<input type="text"/>	<input type="text"/> 400 characters remaining (400 maximum)	<input type="text"/>
Leave *	From ? * <input type="text"/> 2015/04/08	To ? * <input type="text"/> 2015/04/10
Number of days <input type="text"/> 3	Reporting Manager * <input type="text"/> Manager	
<input type="button" value="APPLY"/> <span style="color: red;">i</span> <input type="button" value="Cancel"/>		

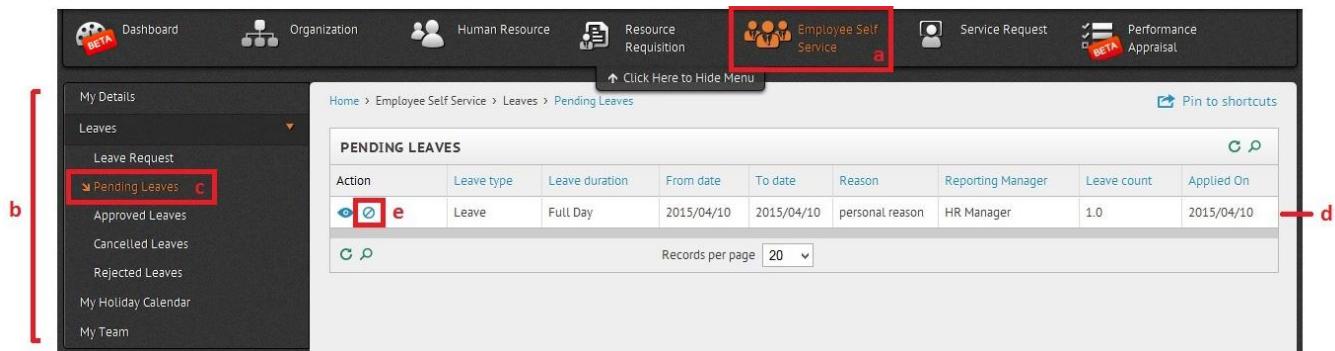
A red bracket labeled 'h' groups the 'Leave Type', 'From', and 'To' fields. A red box labeled 'i' surrounds the 'APPLY' button.

Figure 41

## How do I Cancel my Leave Request:

- a. Click on Employee Self-Service in the top menu
- b. The left side panel will display the submenus
- c. Click on Pending leaves
- d. Leaves that are pending for approval are displayed in the right side panel
- e. Click on Cancel Leaves icon

Refer Figure 42



Action	Leave type	Leave duration	From date	To date	Reason	Reporting Manager	Leave count	Applied On
	Leave	Full Day	2015/04/10	2015/04/10	personal reason	HR Manager	1.0	2015/04/10

Figure 42

- f. In the popup, click on Yes button to cancel the leave

Refer Figure 43

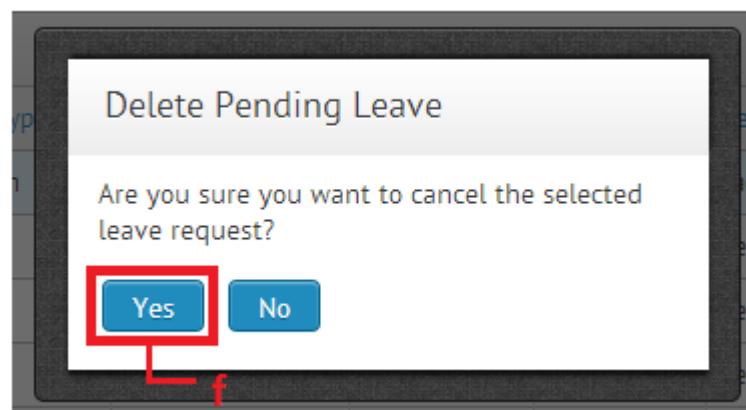
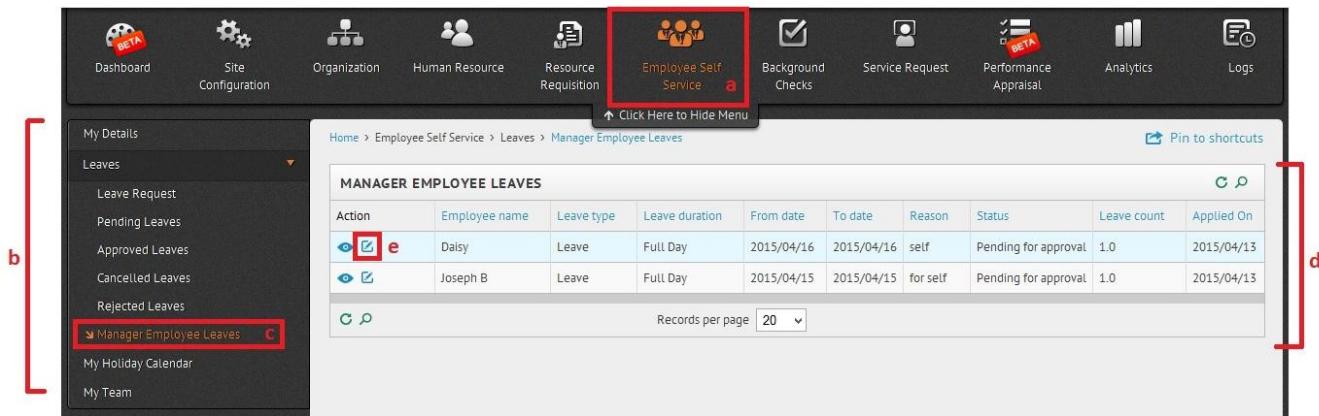


Figure 43

## How to Approve or Reject Leave Requests:

- a. Click on Employee Self-Service in the top menu
- b. The left side panel will display the submenus
- c. Click on Manage Employee Leaves
- d. The leaves applied by the employees working under the logged in user will be displayed in the right side panel
- e. Click on Edit icon of a leave request

Refer Figure 44



Action	Employee name	Leave type	Leave duration	From date	To date	Reason	Status	Leave count	Applied On
	Daisy	Leave	Full Day	2015/04/16	2015/04/16	self	Pending for approval	1.0	2015/04/13
	Joseph B	Leave	Full Day	2015/04/15	2015/04/15	for self	Pending for approval	1.0	2015/04/13

Figure 44

- f. Select approve/reject status in the Approve or Reject dropdown
- g. Click on Save button to approve or reject the leave request

Refer Figure 45

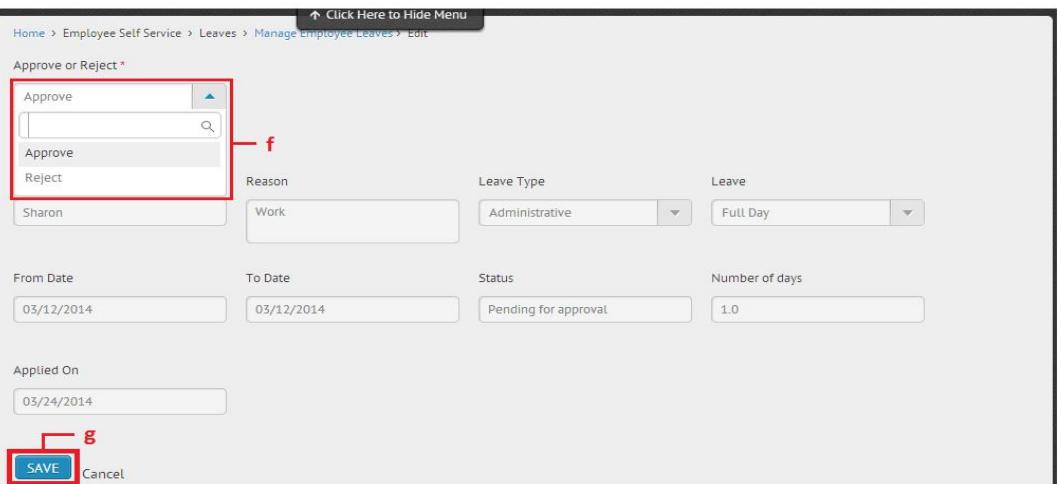


Figure 45

## How do I Raise a Resource Requisition:

- a. Click on Resource Requisition in the top menu
- b. The left side panel will display the submenus
- c. Click on Openings/Positions
- d. Click on Add button in the right side panel

Refer Figure 46

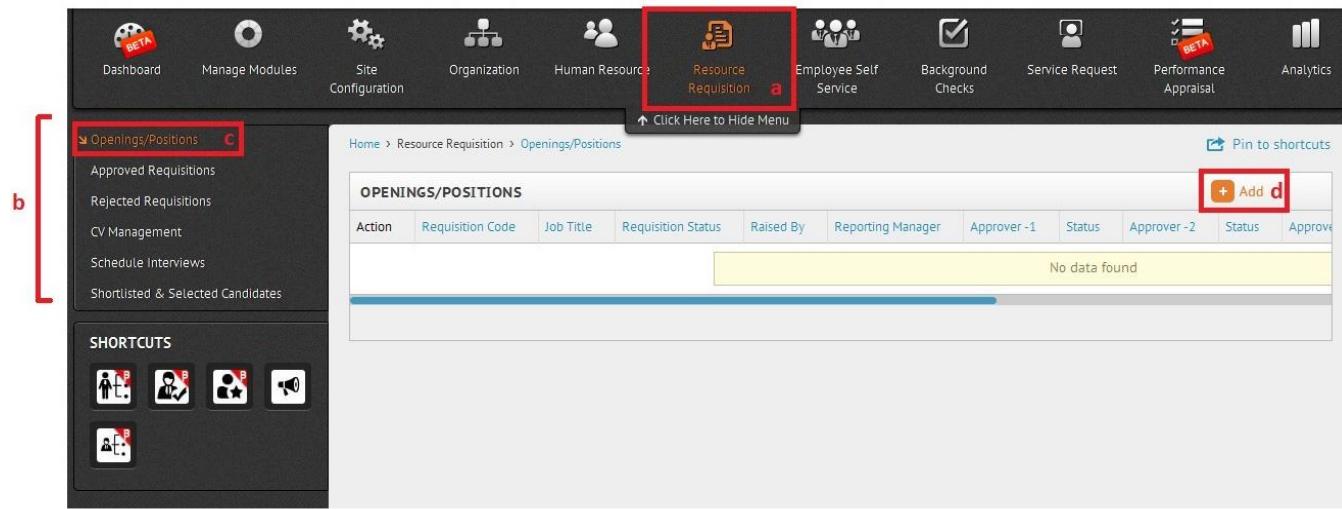
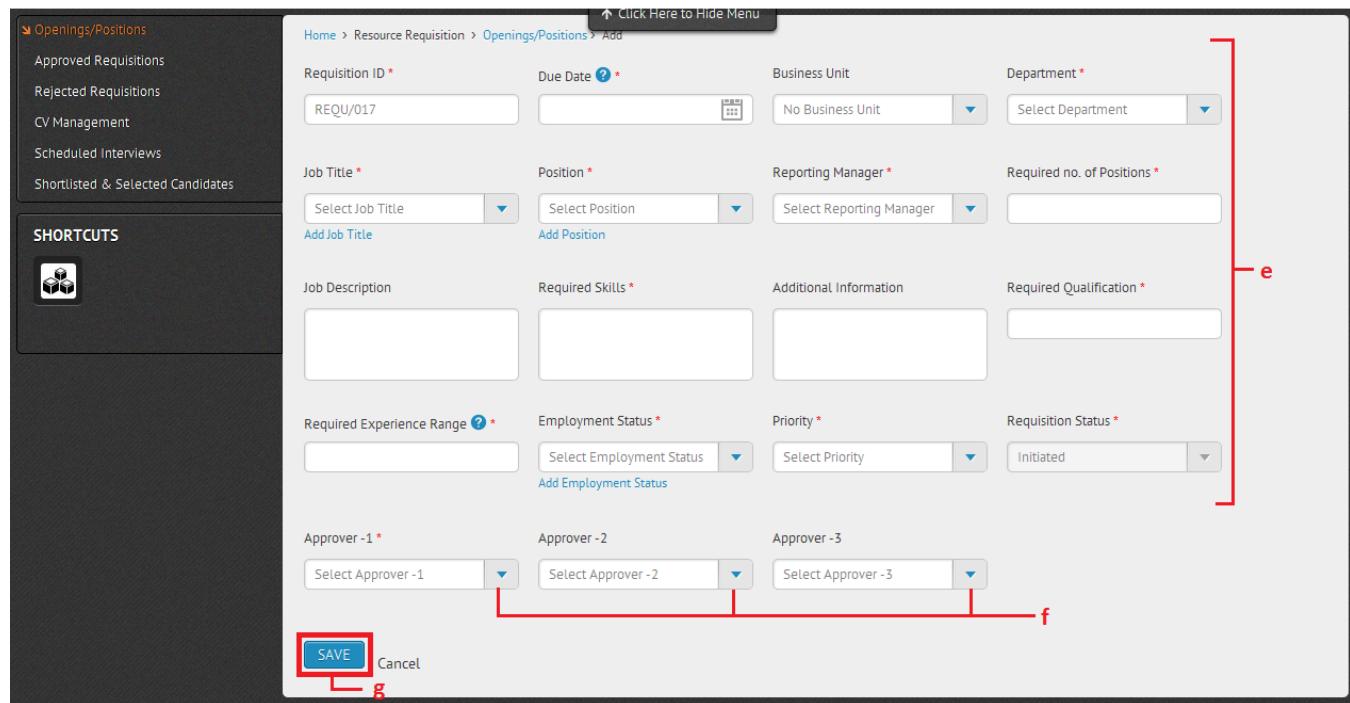


Figure 46

- e. Enter the required details
- f. Select the approver(s) in the approver1, approver2 or approver 3 dropdown
- g. Click on Save button to raise the requisition and send it for approval

Refer Figure 47



Click Here to Hide Menu

Home > Resource Requisition > Openings/Positions > Add

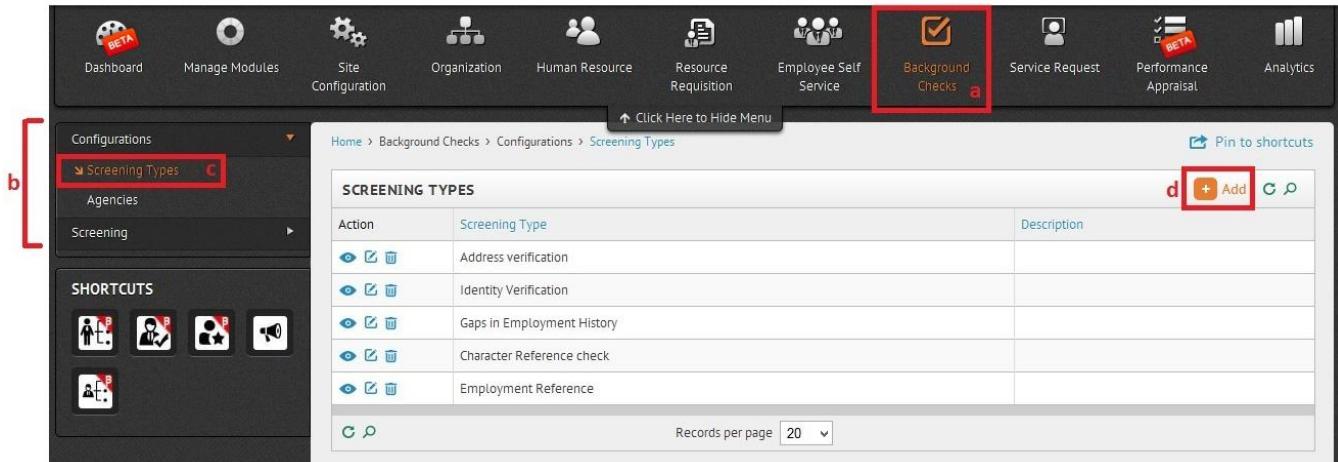
Requisition ID *	Due Date ? *	Business Unit	Department *
REQU/017		No Business Unit	Select Department
Job Title *	Position *	Reporting Manager *	Required no. of Positions *
Select Job Title	Select Position	Select Reporting Manager	
Add Job Title	Add Position		
Job Description	Required Skills *	Additional Information	Required Qualification *
Required Experience Range ? *	Employment Status *	Priority *	Requisition Status *
	Select Employment Status	Select Priority	Initiated
Add Employment Status			
Approver -1 *	Approver -2	Approver -3	
Select Approver -1	Select Approver -2	Select Approver -3	
<b>SAVE</b>	Cancel		

Figure 47

## Where do I Add Screening Type for Background Checks:

- a. Click on Background Checks in the top menu
- b. The left side panel will display the submenus
- c. Click on Screening Types
- d. Click on Add button in the right side panel

Refer Figure 48

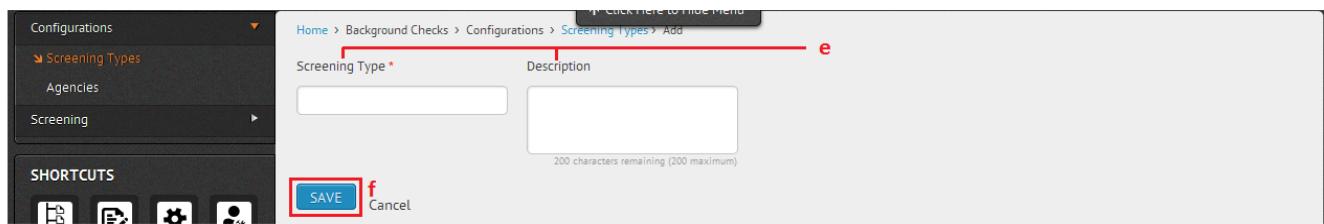


The screenshot shows the Sentrifugo application interface. At the top, there is a navigation bar with various menu items: Dashboard, Manage Modules, Site Configuration, Organization, Human Resource, Resource Requisition, Employee Self Service, **Background Checks** (highlighted with a red box 'a'), Service Request, Performance Appraisal, and Analytics. Below the navigation bar is a left sidebar with sections: Configurations (highlighted with a red bracket 'b'), Agencies, and Screening. Under Screening, 'Screening Types' is selected and highlighted with a red box 'c'. The main content area displays a table titled 'SCREENING TYPES' with columns: Action, Screening Type, and Description. The table lists five screening types: Address verification, Identity Verification, Gaps in Employment History, Character Reference check, and Employment Reference. At the bottom of the table, there are buttons for 'C' (refresh), 'R' (records per page dropdown set to 20), and 'D' (delete). To the right of the table is a 'Pin to shortcuts' icon. At the very bottom of the interface is a footer bar with icons.

Figure 48

- e. Enter the Screening Type and Description if necessary
- f. Click on Save button to add the Screening Type

Refer Figure 49



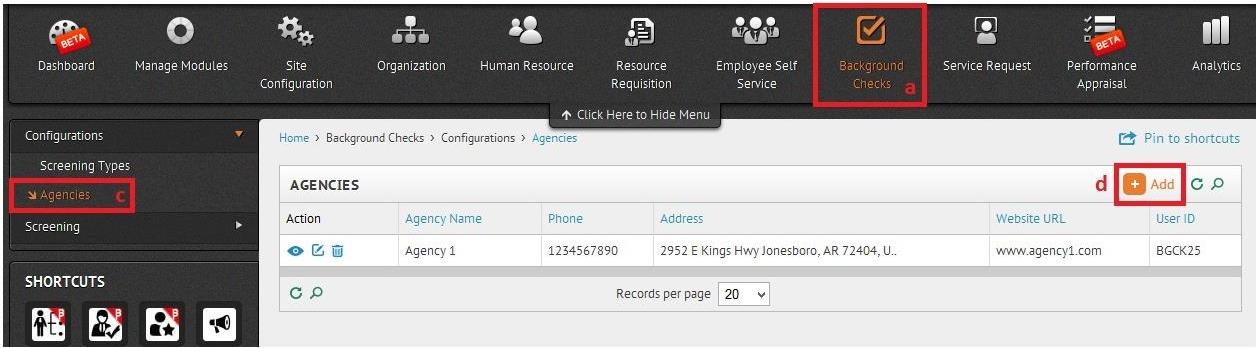
The screenshot shows a modal dialog for adding a new screening type. The title bar says 'Background Checks > Configurations > Screening Types > Add'. The main form has two fields: 'Screening Type\*' and 'Description'. The 'Screening Type\*' field is highlighted with a red box 'e'. Below the fields is a note: '200 characters remaining (200 maximum)'. At the bottom of the form are 'SAVE' and 'Cancel' buttons, with 'SAVE' highlighted with a red box 'f'.

Figure 49

## How do I Add an Agency to Perform Background Checks:

- a. Click on Background Checks in the top menu
- b. The left side panel will display the submenus
- c. Click on Agencies
- d. Click on Add Button in the right side panel

Refer Figure 50

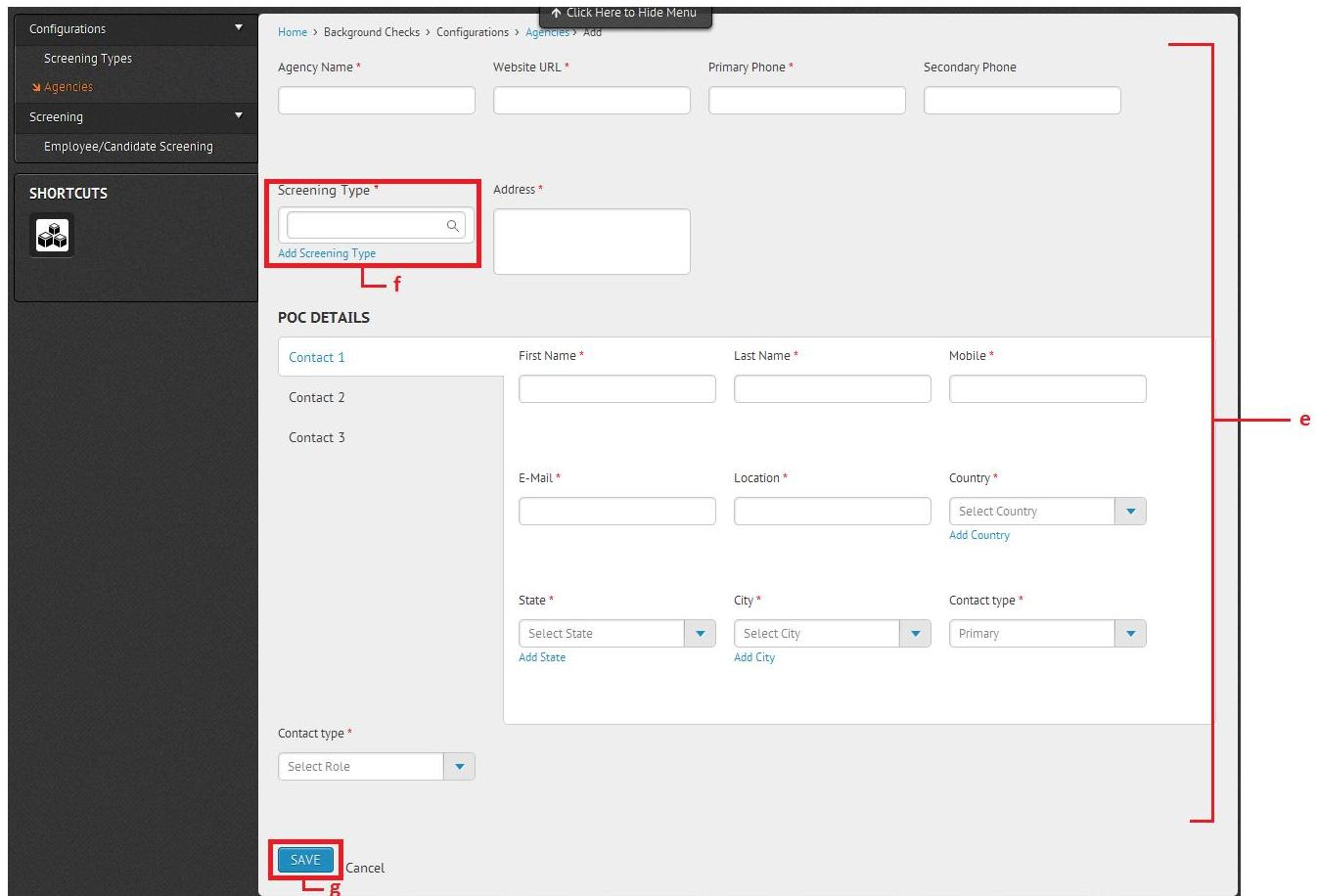


The screenshot shows the Sentrifugo web application interface. At the top, there is a navigation bar with various modules: Dashboard, Manage Modules, Site Configuration, Organization, Human Resource, Resource Requisition, Employee Self Service, **Background Checks** (highlighted with a red box and labeled 'a'), Service Request, Performance Appraisal, and Analytics. Below the navigation bar is a left sidebar with sections for Configurations, Screening Types, and Screenings. Under 'Screening Types', the 'Agencies' link is highlighted with a red box and labeled 'c'. The main content area displays a table titled 'AGENCIES' with one row of data. The table has columns for Action, Agency Name, Phone, Address, Website URL, and User ID. The data row shows 'Agency 1' with phone number 1234567890, address 2952 E Kings Hwy Jonesboro, AR 72404, website www.agency1.com, and user ID BGCK25. At the bottom of the table, there are links for 'C' and 'P' and a 'Records per page' dropdown set to 20.

Figure 50

- e. Provide the required details
- f. Assign a specific Screening Types to the Agency by selecting one or more screening type from Screening Type dropdown
- g. Click on Save to add the Agency

Refer Figure 51



The screenshot shows the 'Agencies' add form in the Sentrifugo interface. The left sidebar has 'Configurations' expanded, with 'Screening Types' selected. Under 'Screening Types', 'Agencies' is also selected. The main form area has the following fields:

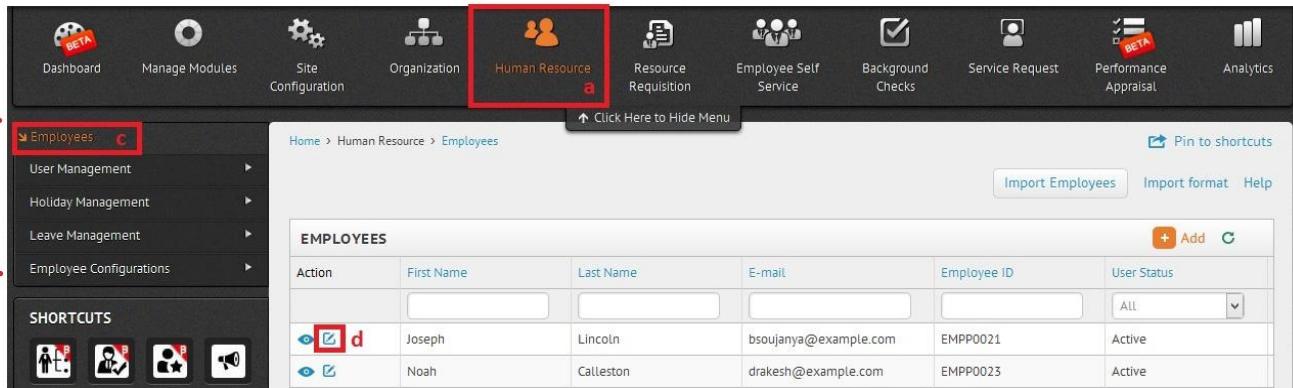
- Agency Name \***: An input field.
- Website URL \***: An input field.
- Primary Phone \***: An input field.
- Secondary Phone**: An input field.
- Screening Type \***: A dropdown menu with a search icon. It is highlighted with a red box and labeled 'f'.
- Address \***: A text input field.
- POC DETAILS** section:
  - Contact 1**: Fields for First Name, Last Name, and Mobile.
  - Contact 2**: A text input field.
  - Contact 3**: A text input field.
  - E-Mail \***: An input field.
  - Location \***: An input field.
  - Country \***: A dropdown menu with 'Select Country' and 'Add Country' options. It is highlighted with a red box and labeled 'e'.
  - State \***: A dropdown menu with 'Select State' and 'Add State' options.
  - City \***: A dropdown menu with 'Select City' and 'Add City' options.
  - Contact type \***: A dropdown menu with 'Primary' and other options.
  - Contact type \***: A dropdown menu with 'Select Role' and other options.
- SAVE** button: A blue button with white text. It is highlighted with a red box and labeled 'g'.
- Cancel** button: A standard grey button next to the 'SAVE' button.

Figure 51

## Can I Send an Employee for Background Checks:

- a. Click on Human Resources in the top menu
- b. The left side panel will display the submenus
- c. Click on Employees
- d. Click on Edit icon corresponding to an employee in the right side panel

Refer Figure 52

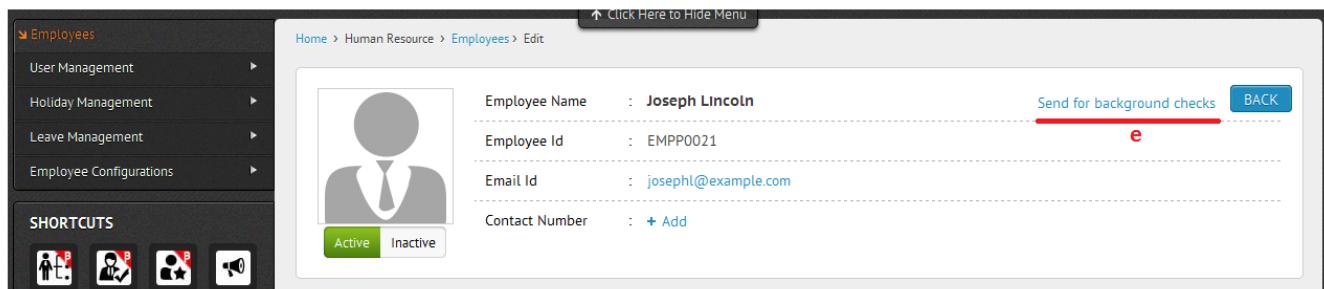


Action	First Name	Last Name	E-mail	Employee ID	User Status
	Joseph	Lincoln	bsoujanya@example.com	EMPP0021	Active
	Noah	Calleston	drakesh@example.com	EMPP0023	Active

Figure 52

- e. In the edit screen, click on Send for background checks link to send that employee for Background Checks

Refer Figure 53



Employee Name : Joseph Lincoln	<a href="#">Send for background checks</a>
Employee Id : EMPP0021	<a href="#">BACK</a>
Email Id : josephl@example.com	
Contact Number : + Add	

Figure 53

## Want to View & Generate Reports:

- a. Click on 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

Refer Figure 54

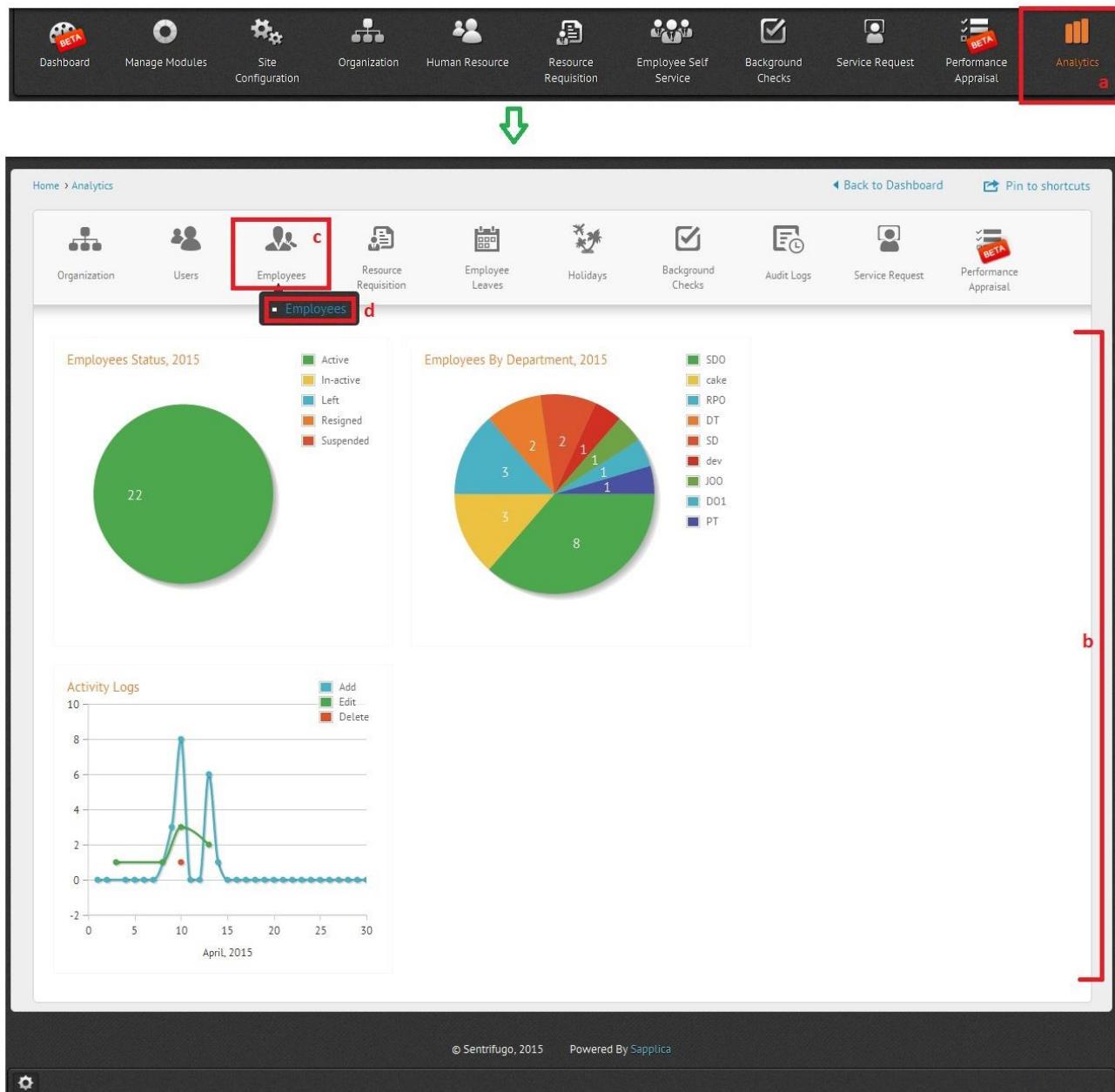
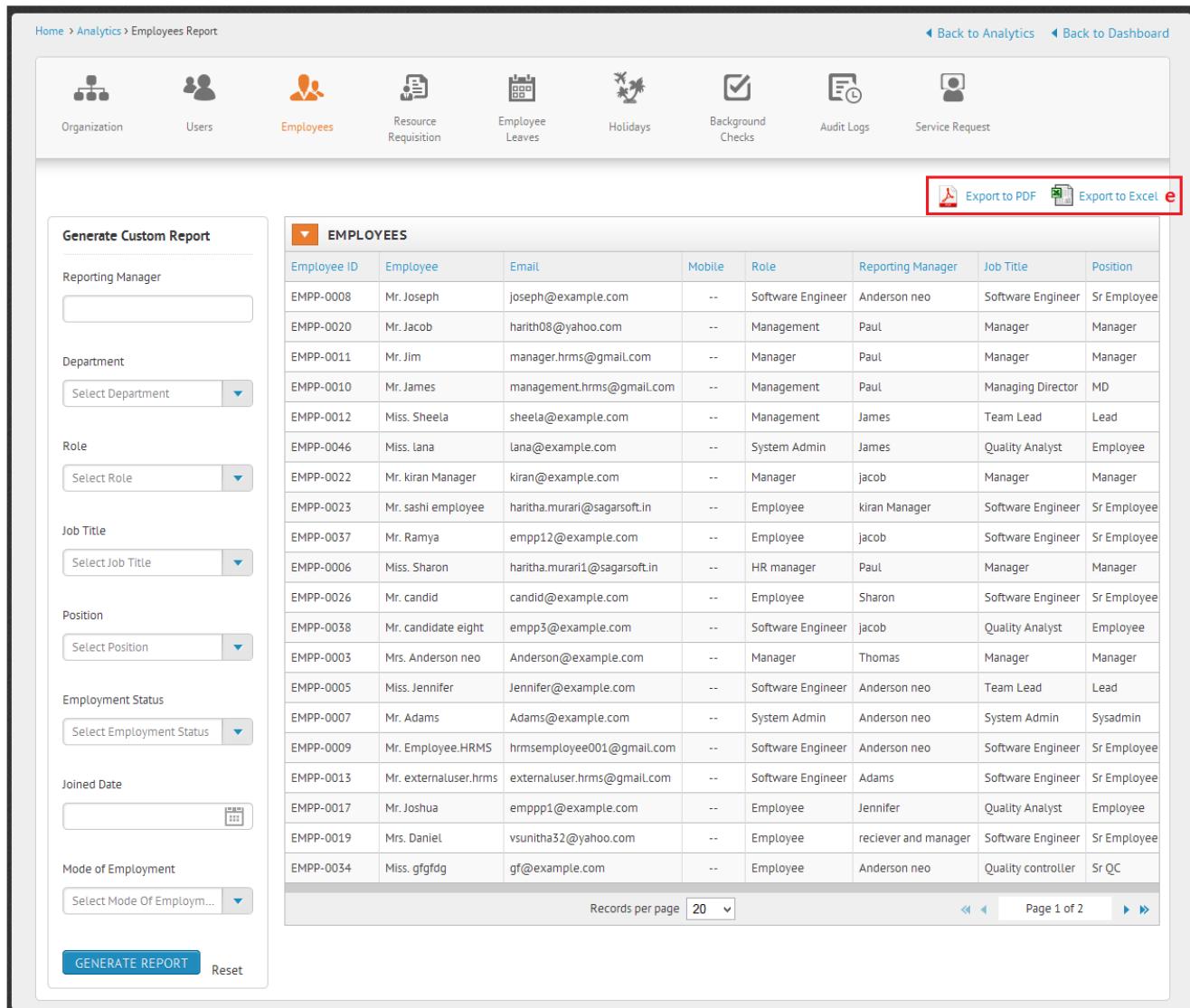


Figure 54

- e. In the selected submenu page, click on Export to PDF or Export to Excel to generate report

Refer Figure 55



The screenshot shows the 'Employees Report' page under the 'Analytics' section. On the left, there is a sidebar with filters for 'Reporting Manager', 'Department', 'Role', 'Job Title', 'Position', 'Employment Status', 'Joined Date', and 'Mode of Employment'. Below these filters are 'GENERATE REPORT' and 'Reset' buttons. The main area displays a table titled 'EMPLOYEES' with 34 rows of employee data. The table columns include Employee ID, Employee, Email, Mobile, Role, Reporting Manager, Job Title, and Position. At the bottom of the table, there are buttons for 'Records per page' (set to 20), 'Page 1 of 2', and navigation arrows.

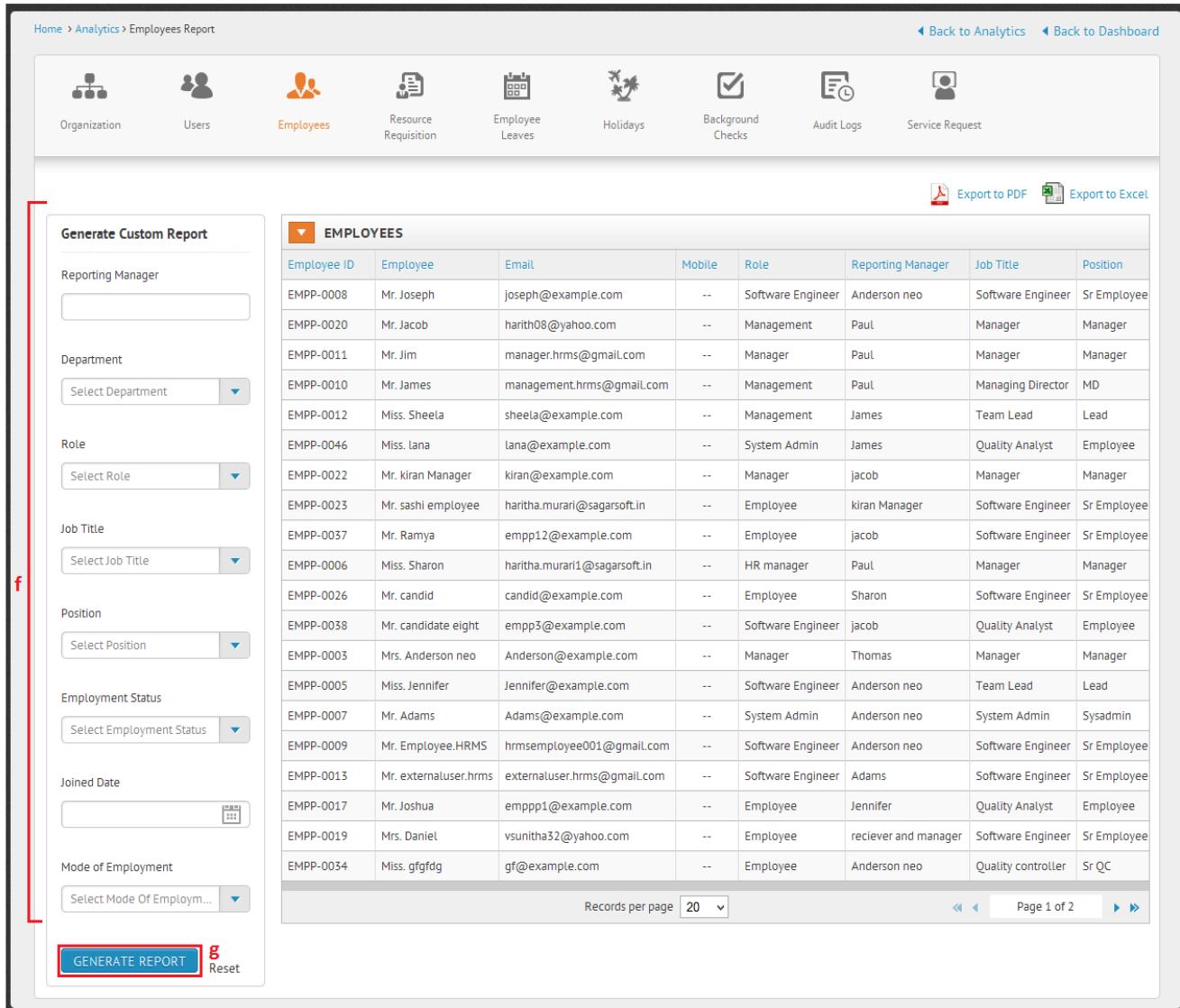
EMPLOYEES								
Employee ID	Employee	Email	Mobile	Role	Reporting Manager	Job Title	Position	
EMPP-0008	Mr. Joseph	joseph@example.com	--	Software Engineer	Anderson neo	Software Engineer	Sr Employee	
EMPP-0020	Mr. Jacob	harith08@yahoo.com	--	Management	Paul	Manager	Manager	
EMPP-0011	Mr. Jim	manager.hrms@gmail.com	--	Manager	Paul	Manager	Manager	
EMPP-0010	Mr. James	management.hrms@gmail.com	--	Management	Paul	Managing Director	MD	
EMPP-0012	Miss. Sheela	sheela@example.com	--	Management	James	Team Lead	Lead	
EMPP-0046	Miss. lana	lana@example.com	--	System Admin	James	Quality Analyst	Employee	
EMPP-0022	Mr. kiran Manager	kiran@example.com	--	Manager	jacob	Manager	Manager	
EMPP-0023	Mr. sashi employee	haritha.murari@sagarsoft.in	--	Employee	kiran Manager	Software Engineer	Sr Employee	
EMPP-0037	Mr. Ramya	empp12@example.com	--	Employee	jacob	Software Engineer	Sr Employee	
EMPP-0006	Miss. Sharon	haritha.murari1@sagarsoft.in	--	HR manager	Paul	Manager	Manager	
EMPP-0026	Mr. candid	candid@example.com	--	Employee	Sharon	Software Engineer	Sr Employee	
EMPP-0038	Mr. candidate eight	empp3@example.com	--	Software Engineer	jacob	Quality Analyst	Employee	
EMPP-0003	Mrs. Anderson neo	Anderson@example.com	--	Manager	Thomas	Manager	Manager	
EMPP-0005	Miss. Jennifer	Jennifer@example.com	--	Software Engineer	Anderson neo	Team Lead	Lead	
EMPP-0007	Mr. Adams	Adams@example.com	--	System Admin	Anderson neo	System Admin	Sysadmin	
EMPP-0009	Mr. Employee.HRMS	hrmsempl001@gmail.com	--	Software Engineer	Anderson neo	Software Engineer	Sr Employee	
EMPP-0013	Mr. externaluser.hrms	externaluser.hrms@gmail.com	--	Software Engineer	Adams	Software Engineer	Sr Employee	
EMPP-0017	Mr. Joshua	emppp1@example.com	--	Employee	Jennifer	Quality Analyst	Employee	
EMPP-0019	Mrs. Daniel	vsunitha32@yahoo.com	--	Employee	reciever and manager	Software Engineer	Sr Employee	
EMPP-0034	Miss. gfgfdg	gf@example.com	--	Employee	Anderson neo	Quality controller	Sr QC	

Figure 55

Or, to generate custom reports

- f. Provide the specifications required to generate report
- g. Click on Generate Report to generate a custom report

Refer Figure 56



Home > Analytics > Employees Report

◀ Back to Analytics ▶ Back to Dashboard

Organization Users Employees Resource Requisition Employee Leaves Holidays Background Checks Audit Logs Service Request

Export to PDF Export to Excel

EMPLOYEES							
Employee ID	Employee	Email	Mobile	Role	Reporting Manager	Job Title	Position
EMPP-0008	Mr. Joseph	joseph@example.com	--	Software Engineer	Anderson neo	Software Engineer	Sr Employee
EMPP-0020	Mr. Jacob	harith08@yahoo.com	--	Management	Paul	Manager	Manager
EMPP-0011	Mr. Jim	manager.hrms@gmail.com	--	Manager	Paul	Manager	Manager
EMPP-0010	Mr. James	management.hrms@gmail.com	--	Management	Paul	Managing Director	MD
EMPP-0012	Miss. Sheela	sheela@example.com	--	Management	James	Team Lead	Lead
EMPP-0046	Miss. lana	lana@example.com	--	System Admin	James	Quality Analyst	Employee
EMPP-0022	Mr. kiran Manager	kiran@example.com	--	Manager	jacob	Manager	Manager
EMPP-0023	Mr. sashi employee	haritha.murari@sagarsoft.in	--	Employee	kiran Manager	Software Engineer	Sr Employee
EMPP-0037	Mr. Ramya	empp12@example.com	--	Employee	jacob	Software Engineer	Sr Employee
EMPP-0006	Miss. Sharon	haritha.murari1@sagarsoft.in	--	HR manager	Paul	Manager	Manager
EMPP-0026	Mr. candid	candid@example.com	--	Employee	Sharon	Software Engineer	Sr Employee
EMPP-0038	Mr. candidate eight	empp3@example.com	--	Software Engineer	jacob	Quality Analyst	Employee
EMPP-0003	Mrs. Anderson neo	Anderson@example.com	--	Manager	Thomas	Manager	Manager
EMPP-0005	Miss. Jennifer	Jennifer@example.com	--	Software Engineer	Anderson neo	Team Lead	Lead
EMPP-0007	Mr. Adams	Adams@example.com	--	System Admin	Anderson neo	System Admin	Sysadmin
EMPP-0009	Mr. Employee.HRMS	hrmsemployee001@gmail.com	--	Software Engineer	Anderson neo	Software Engineer	Sr Employee
EMPP-0013	Mr. externaluser.hrms	externaluser.hrms@gmail.com	--	Software Engineer	Adams	Software Engineer	Sr Employee
EMPP-0017	Mr. Joshua	emppp1@example.com	--	Employee	Jennifer	Quality Analyst	Employee
EMPP-0019	Mrs. Daniel	vsunitha32@yahoo.com	--	Employee	reciever and manager	Software Engineer	Sr Employee
EMPP-0034	Miss. gfgfdg	gf@example.com	--	Employee	Anderson neo	Quality controller	Sr QC

Records per page: 20 | Page 1 of 2 | ▲ ▼ ▶ ▷

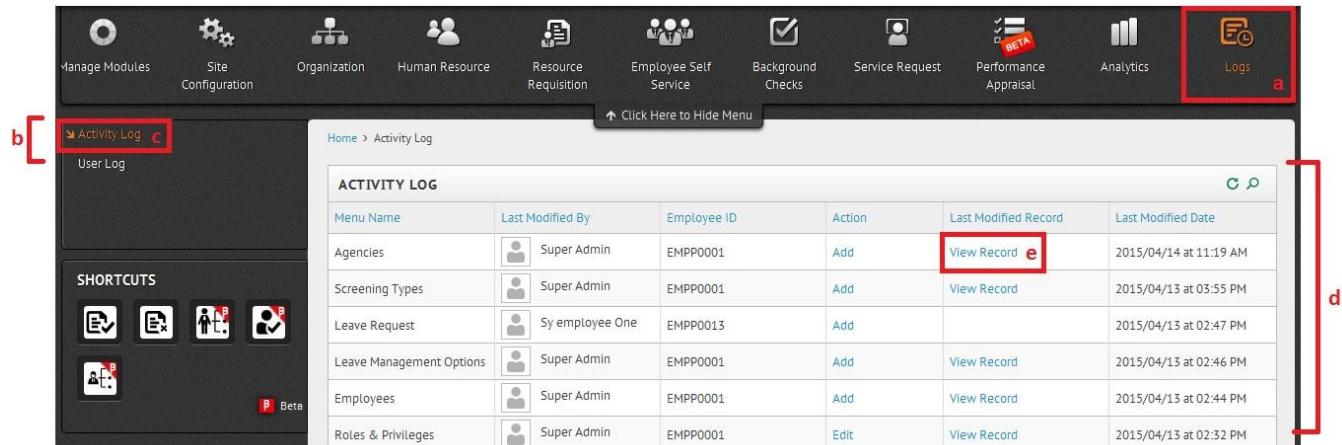
**GENERATE REPORT** **g** Reset

Figure 56

## Where can you View Activity log:

- Click on Logs in the top menu
- The left side panel will display the submenus
- Click on Activity log
- View the logs of all the activities in the right side panel
- Click on View Record to view the modified record.

Refer Figure 57



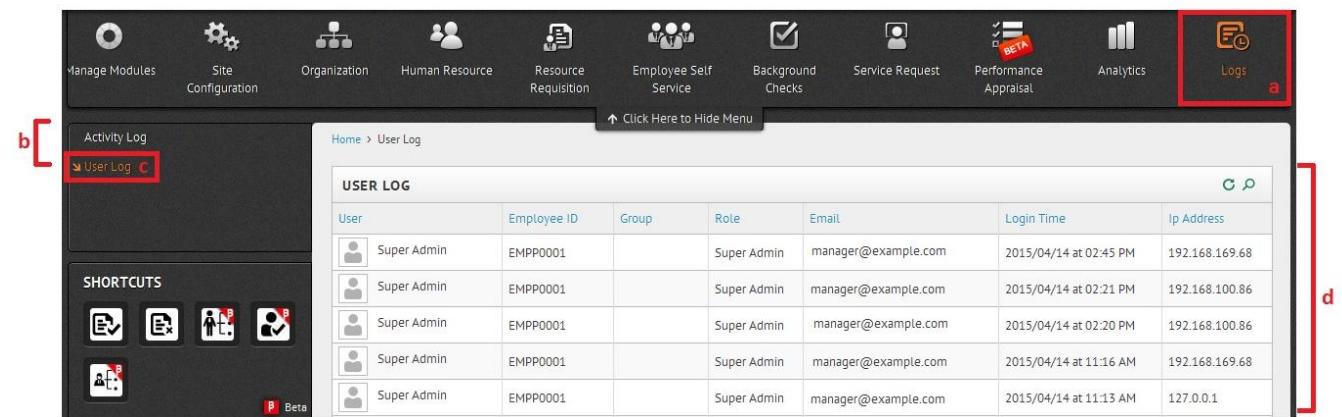
Menu Name	Last Modified By	Employee ID	Action	Last Modified Record	Last Modified Date
Agencies	Super Admin	EMPP0001	Add	<a href="#">View Record</a>	2015/04/14 at 11:19 AM
Screening Types	Super Admin	EMPP0001	Add	<a href="#">View Record</a>	2015/04/13 at 03:55 PM
Leave Request	Sy employee One	EMPP0013	Add		2015/04/13 at 02:47 PM
Leave Management Options	Super Admin	EMPP0001	Add	<a href="#">View Record</a>	2015/04/13 at 02:46 PM
Employees	Super Admin	EMPP0001	Add	<a href="#">View Record</a>	2015/04/13 at 02:44 PM
Roles & Privileges	Super Admin	EMPP0001	Edit	<a href="#">View Record</a>	2015/04/13 at 02:32 PM

Figure 57

## Where can I View User log:

- Click on Logs in the top menu
- The left side panel will display the submenus
- Click on User log
- View the logs of all the users in the right side panel

Refer Figure 58



User	Employee ID	Group	Role	Email	Login Time	Ip Address
Super Admin	EMPP0001		Super Admin	manager@example.com	2015/04/14 at 02:45 PM	192.168.169.68
Super Admin	EMPP0001		Super Admin	manager@example.com	2015/04/14 at 02:21 PM	192.168.100.86
Super Admin	EMPP0001		Super Admin	manager@example.com	2015/04/14 at 02:20 PM	192.168.100.86
Super Admin	EMPP0001		Super Admin	manager@example.com	2015/04/14 at 11:16 AM	192.168.169.68
Super Admin	EMPP0001		Super Admin	manager@example.com	2015/04/14 at 11:13 AM	127.0.0.1

Figure 58

## Looking to Set Shortcuts:

- i. Click on the organization logo in the top left of the header
- j. Click on Click here link in the Shortcuts panel in the left side

Refer Figure 59

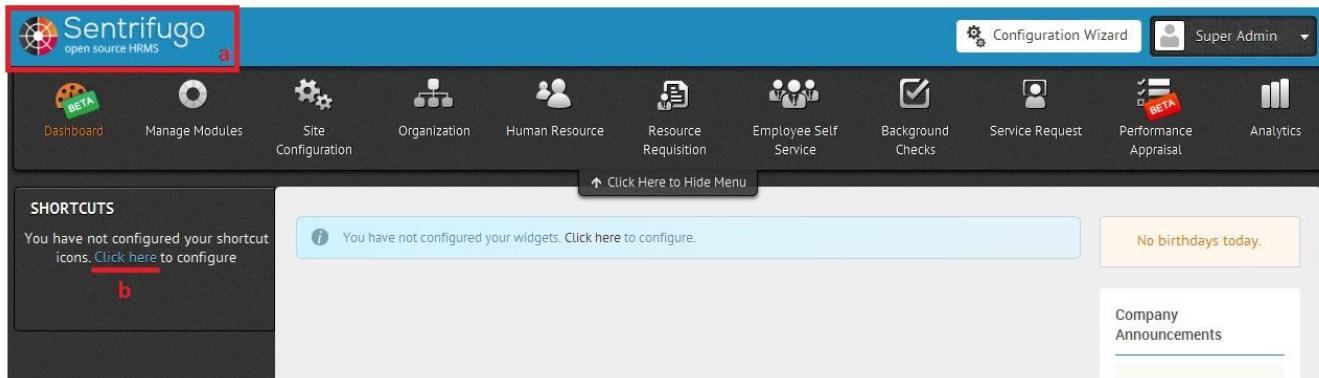


Figure 59

Or

- k. Click on logged in user's name in the top right of the header
- l. Click on Settings in the dropdown
- m. Select Shortcuts button in the settings page
- n. Drag and drop the selected menu item(s) in the shortcuts box
- o. Click on Save to add shortcuts in the Shortcuts panel

Refer Figure 60

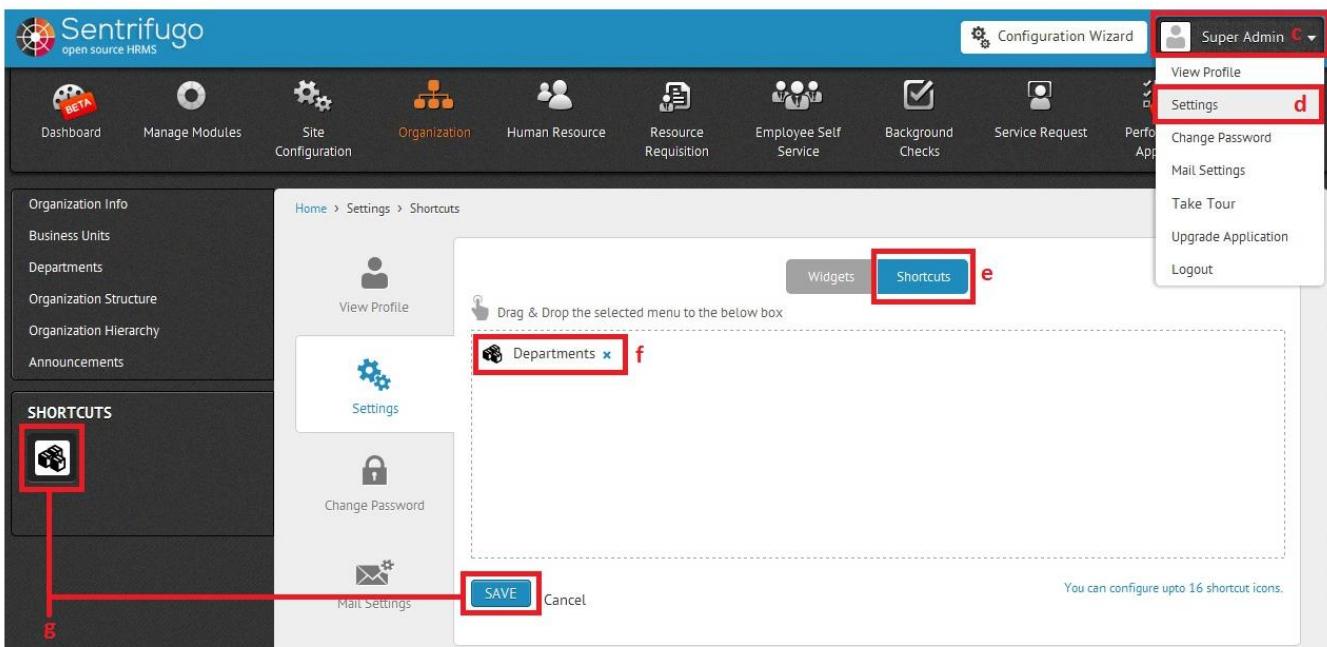
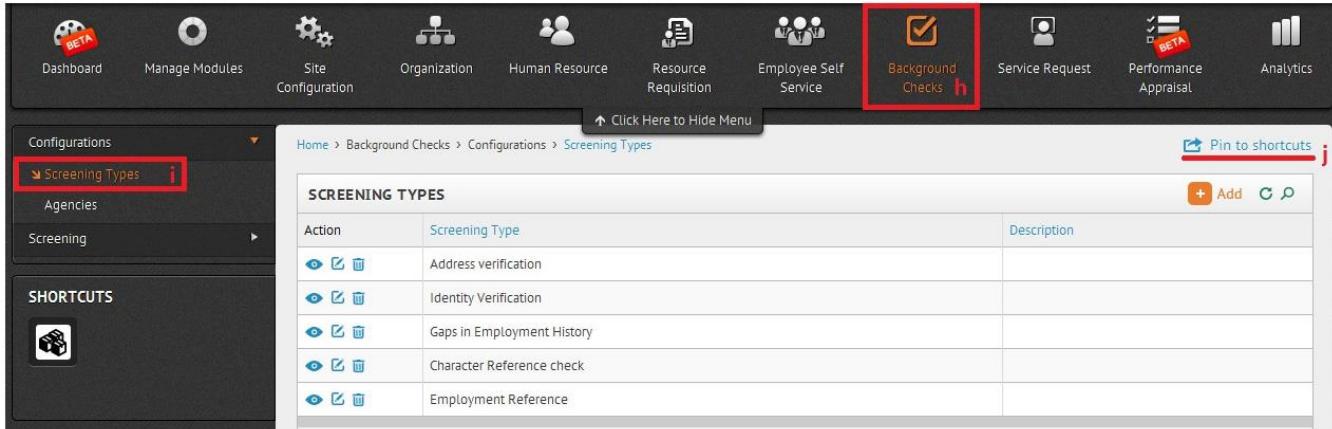


Figure 60

You can also create Shortcuts as you browse through the application

- p. Click on a desired module in the top menu
- q. Click on the desired submenu in the left side panel
- r. Click on Create Shortcut in the right side panel

For further understanding, Refer Figure 61, which explains about creating a shortcut as you browse through the application



Action	Screening Type	Description
	Address verification	
	Identity Verification	
	Gaps in Employment History	
	Character Reference check	
	Employment Reference	

Figure 61

### Looking to Set Widgets:

- a. Click on the organization logo in the top left of the header
- b. Click on Click here link in the Widgets panel in the right side

Refer figure 62

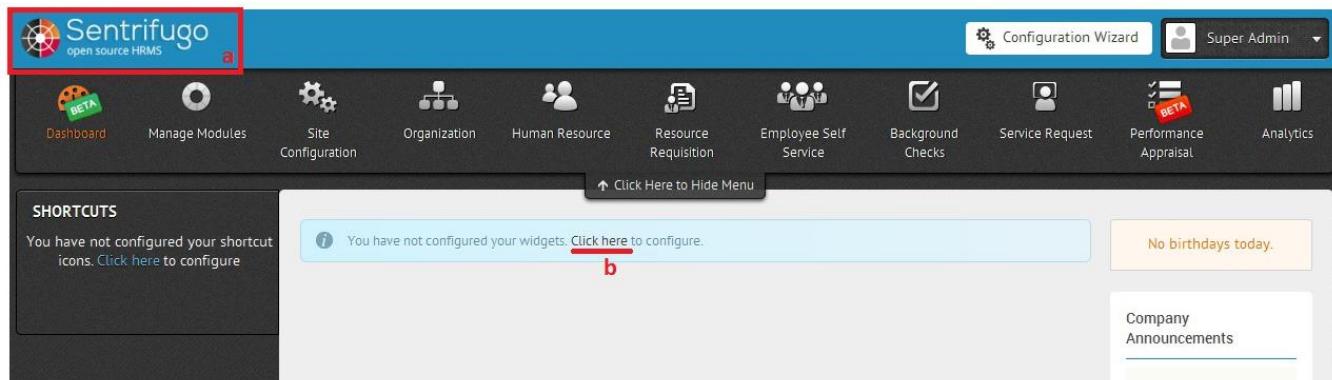


Figure 62

Or

- c. Click on logged in user's name in the top right of the header
- d. Click on Settings in the dropdown

Or

- e. Click on Settings icon in the bottom left of the footer
- f. Select Widgets button in the settings page
- g. Drag and drop the selected menu item(s) in the widgets box
- h. Click on Save to add Widgets in the Widgets panel

Refer Figure 63

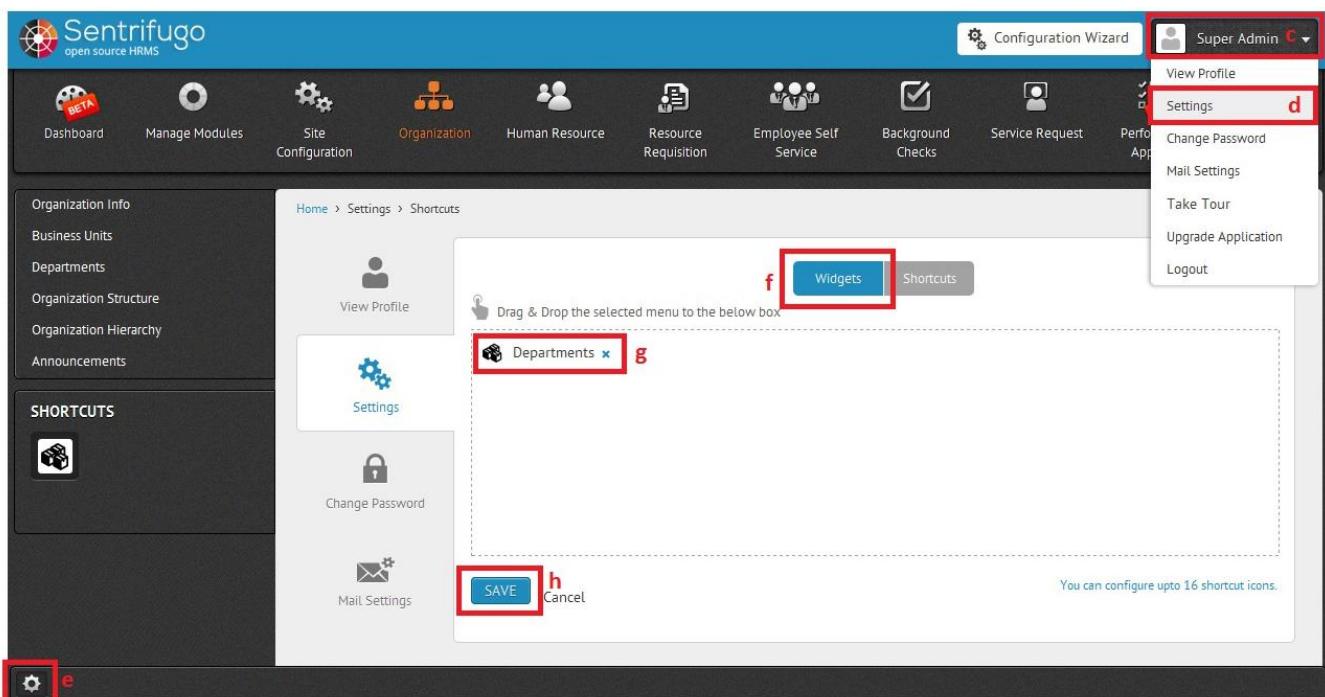


Figure 63

## Want to Configure Service Request:

- a. Click on the Service Request in the top menu
- b. The left side panel will display the submenus
- c. Click on desired submenu
- d. Click on Add button on the right side panel
- e. Enter the Required details
- f. Click Save button to add the details

For further understanding refer to Figure 64, which explains about adding Settings

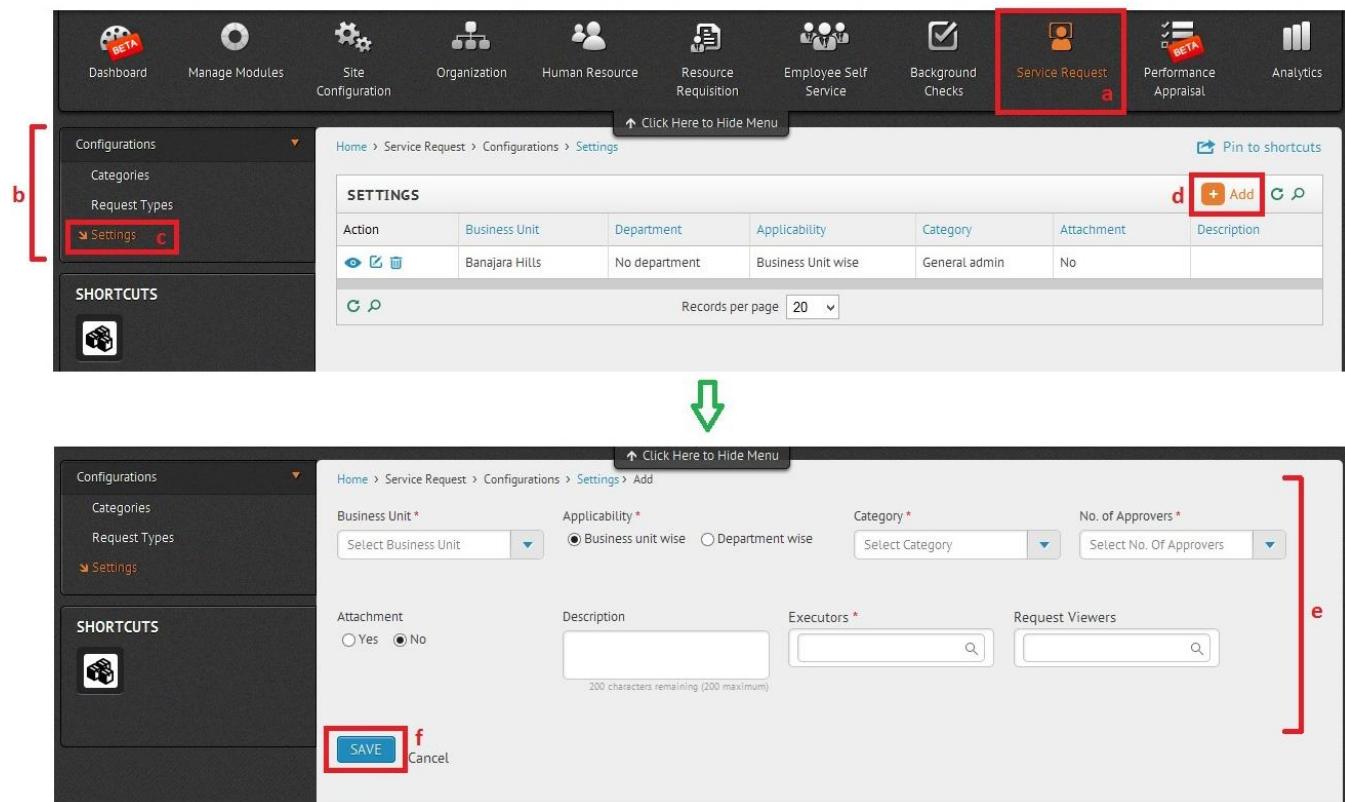
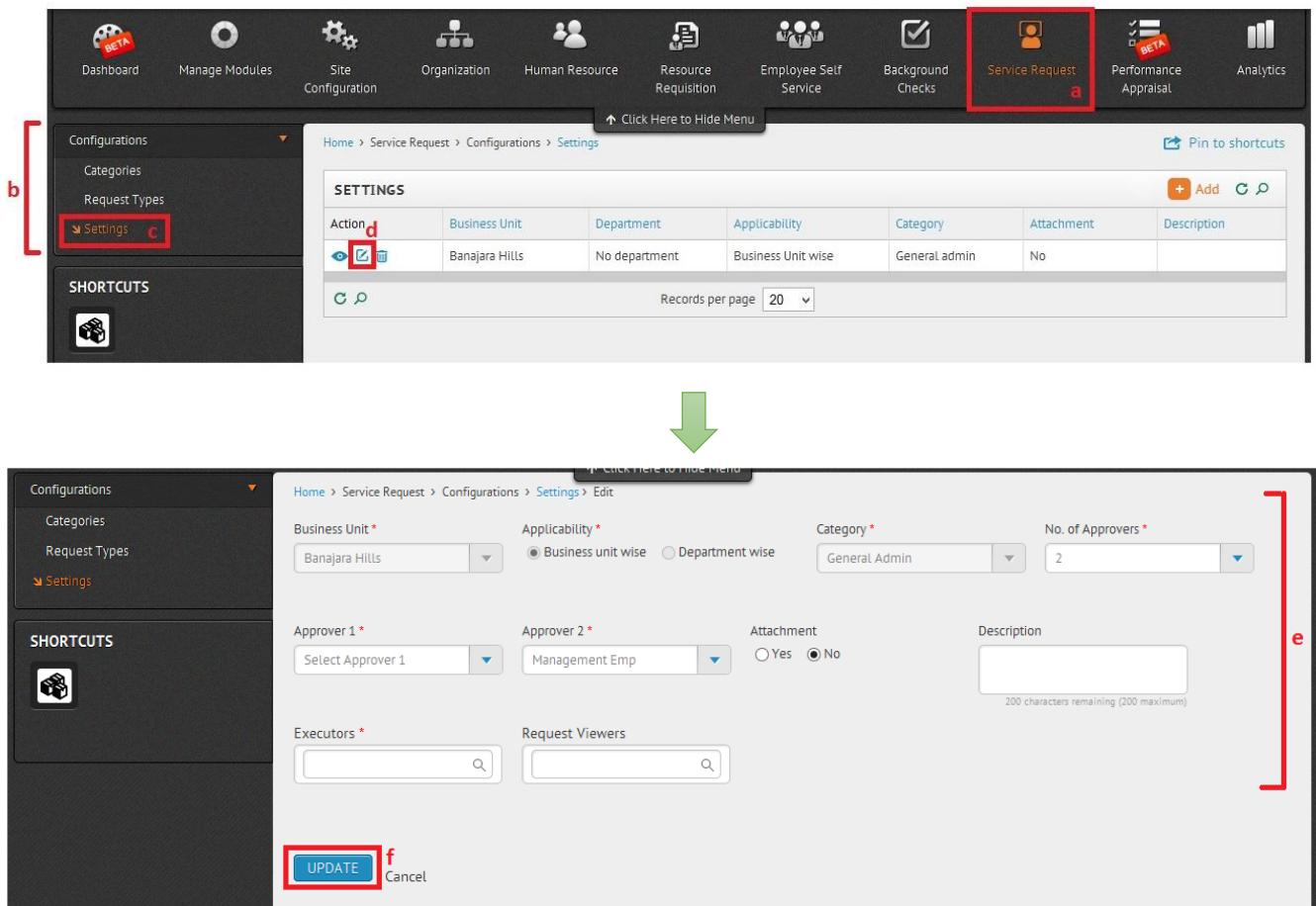


Figure 64

## Want to Edit Service Request:

- a. Click on the Service Request in the top menu
- b. The left side panel will display the submenus
- c. Click on desired submenu
- d. Click on Edit icon for the record that is to be edited on the right side panel
- e. Make the required changes to the record
- f. Click Update button to save the changes made.

Refer Figure 65



The figure consists of two screenshots of the Sentrifugo application interface, connected by a large green downward arrow.

**Screenshot 1 (Top):** This shows the main navigation bar with various modules like Dashboard, Manage Modules, Site Configuration, Human Resource, etc. The "Service Request" module is highlighted with a red box and labeled 'a'. On the left sidebar, under "Configurations", the "Settings" option is selected and highlighted with a red box, labeled 'c'. A red bracket on the left labeled 'b' points to the sidebar area.

**Screenshot 2 (Bottom):** This shows a detailed configuration page for "Settings". It includes fields for Action (selected), Business Unit (Banajara Hills), Department (No department), Applicability (Business Unit wise), Category (General admin), Attachment (No), and Description. Below this is a table with one row showing similar data. A red bracket on the right labeled 'e' points to the right side of the page. At the bottom, there are "UPDATE" and "Cancel" buttons, with the "UPDATE" button highlighted with a red box and labeled 'f'.

Figure 65

## How to Delete Service Request:

- a. Click on the Service Request in the top menu
- b. The left side panel will display the submenus
- c. Click on desired submenu
- d. Click on Delete icon for the record that is to be deleted on the right side panel

Refer to Figure 66

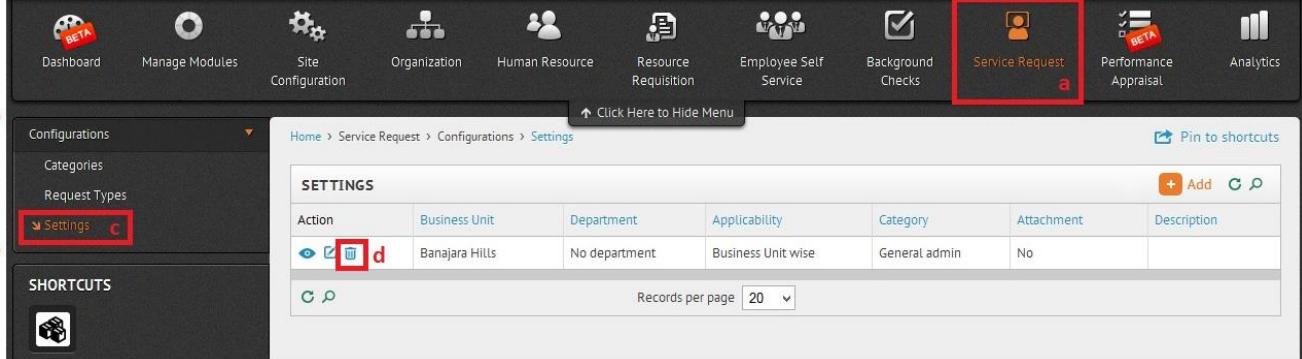


Figure 66

- e. In the Confirmation pop up , Click on Yes to delete the record

Refer to Figure 67

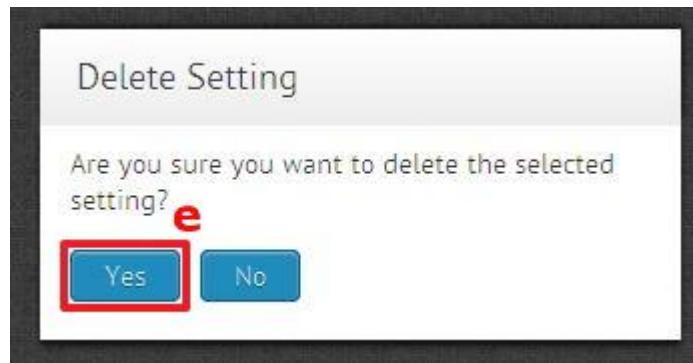


Figure 67

## How do I set Cron Jobs:

You should have received an email upon successful installation of Sentrifugo.

- a. Copy the link in the Cron Job section in the email
- b. The first link in the Cron Job section is used to send application related emails to the employees
- c. The second link is to send emails to the employees to intimate them regarding the expiration of their identity documents
- d. Configure the Cron Job in your server to execute it periodically

Refer Figure 68

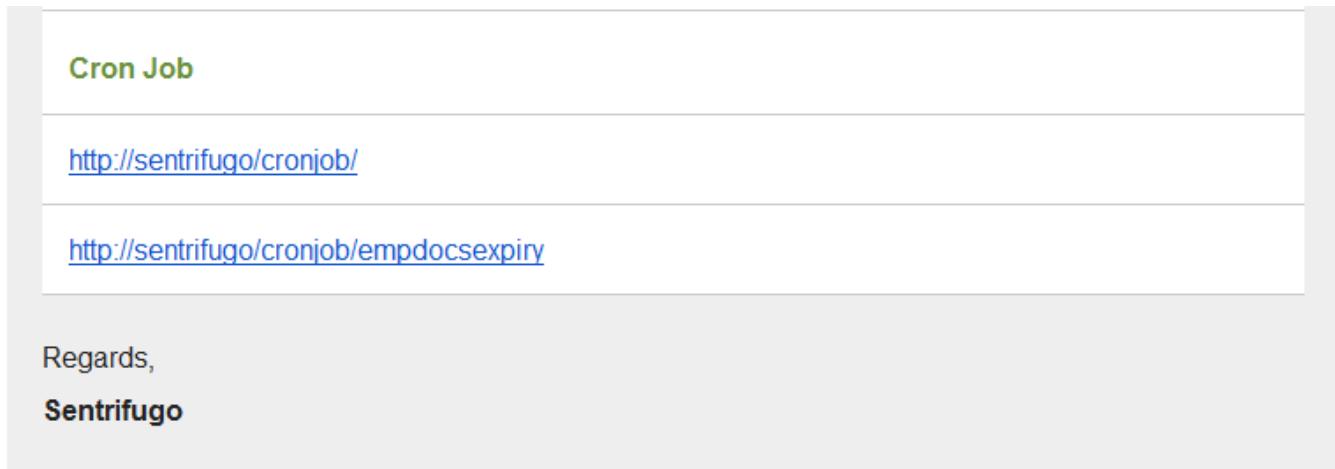


Figure 68

## How to Download Import Format

- a. Click on Human Resources in the top menu
  - b. Click on Employees submenu on the left side panel
  - c. Click on Import Format link above the employee details grid on the right hand side
  - d. For further guidance, click on Help link

Refer to figure 69

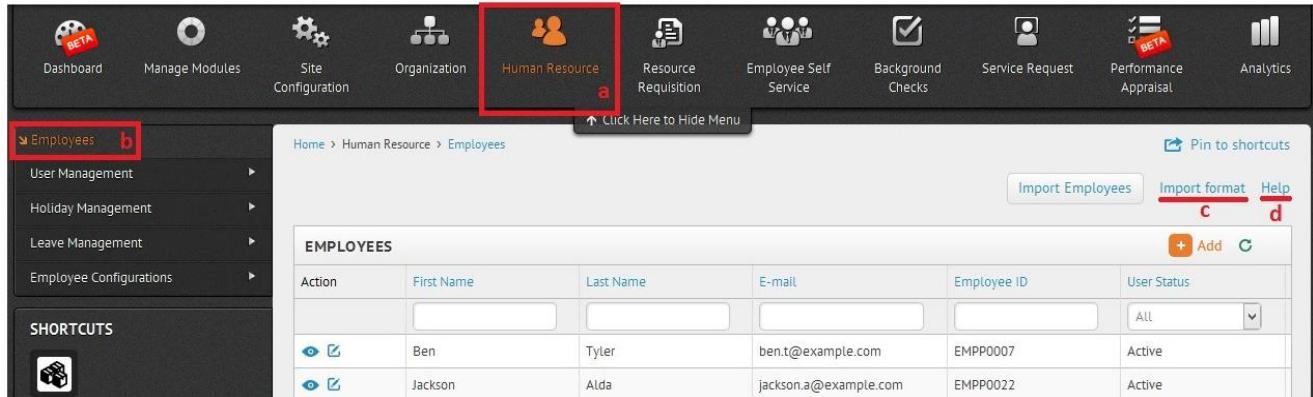


Figure 69

You should be able to download an excel sheet which defines the import format to add employees

Refer Figure 70 for the import format

Figure 70

## From where do I pick the Import format details

a. Prefix

- I. Click on Site configurations in the top menu
  - II. Click on General submenu on the left side panel
  - III. Click on Prefixes link
  - IV. Add the required prefix by clicking on Add button
  - V. Use the Prefix to enter in the import excel

Refer Figure 71

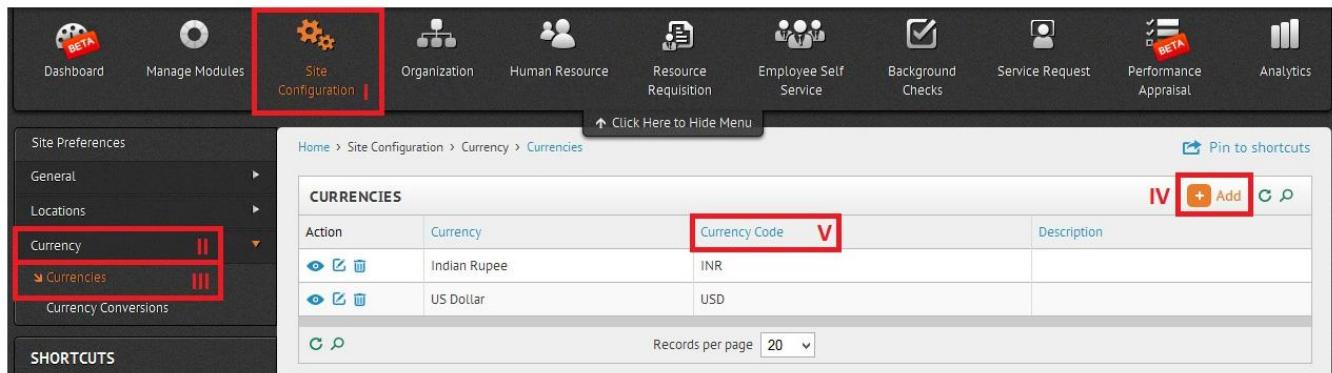


Figure 71

Note: You can only enter prefixes that are existing in the application.

b. Enter the First and Last Name of the employee

- I. These fields are mandatory and accept only alphabetic characters

Refer Figure 72

Figure 72

**c. Role Type**

- I. Click on Human Resource in the top menu
  - II. Click on User Management submenu on the left side panel
  - III. Click on Roles & Privileges link
  - IV. Add the required roles and provide privileges to the role by clicking Add button
  - V. Use the Role Type to enter in the import excel

Refer Figure 73



Figure 73

Note: You can only enter roles that are existing in the application

d. Enter the email of the employee

- I. Email address should unique and of a valid format
  - II. Email field is mandatory

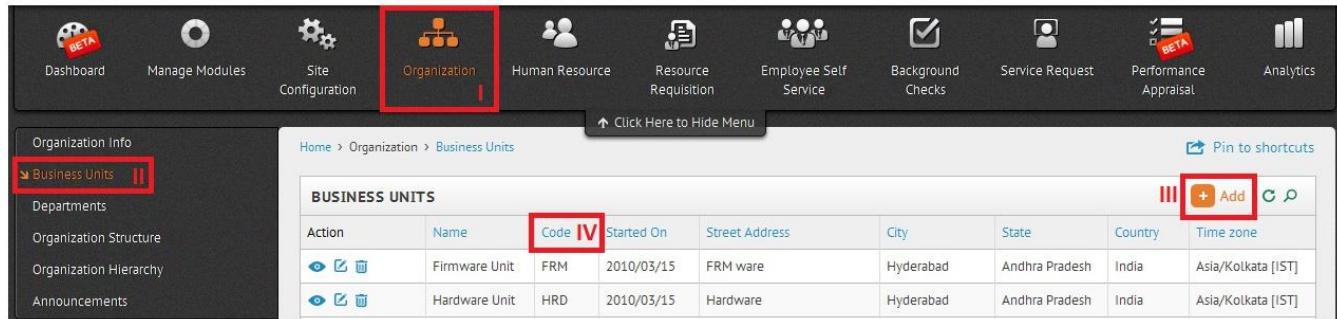
Refer figure 74

Figure 74

### e. Business Unit

- I. Click on Organization in the top menu
- II. Click on Business Units in the left side panel
- III. Click on Add button to add the desired business unit
- IV. Use the Code to enter in the import excel

Refer Figure 75



Action	Name	Code	Started On	Street Address	City	State	Country	Time zone
	Firmware Unit	FRM	2010/03/15	FRM ware	Hyderabad	Andhra Pradesh	India	Asia/Kolkata [IST]
	Hardware Unit	HRD	2010/03/15	Hardware	Hyderabad	Andhra Pradesh	India	Asia/Kolkata [IST]

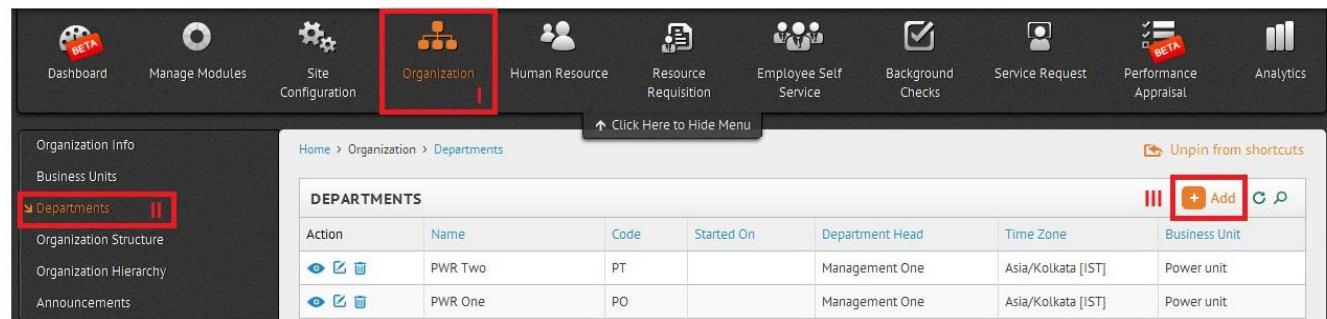
Figure 75

Note: You can only enter business units that are existing in the application

### f. Departments

- I. Click on Organization in the top menu
- II. Click on Departments in the left side panel
- III. Click on Add button to add the desired department
- IV. Use the Code to enter in the import excel
- V. Please make sure that Department should fall under the Business Unit entered in import excel

Refer Figure 76



Action	Name	Code	Started On	Department Head	Time Zone	Business Unit
	PWR Two	PT		Management One	Asia/Kolkata [IST]	Power unit
	PWR One	PO		Management One	Asia/Kolkata [IST]	Power unit

Figure 76

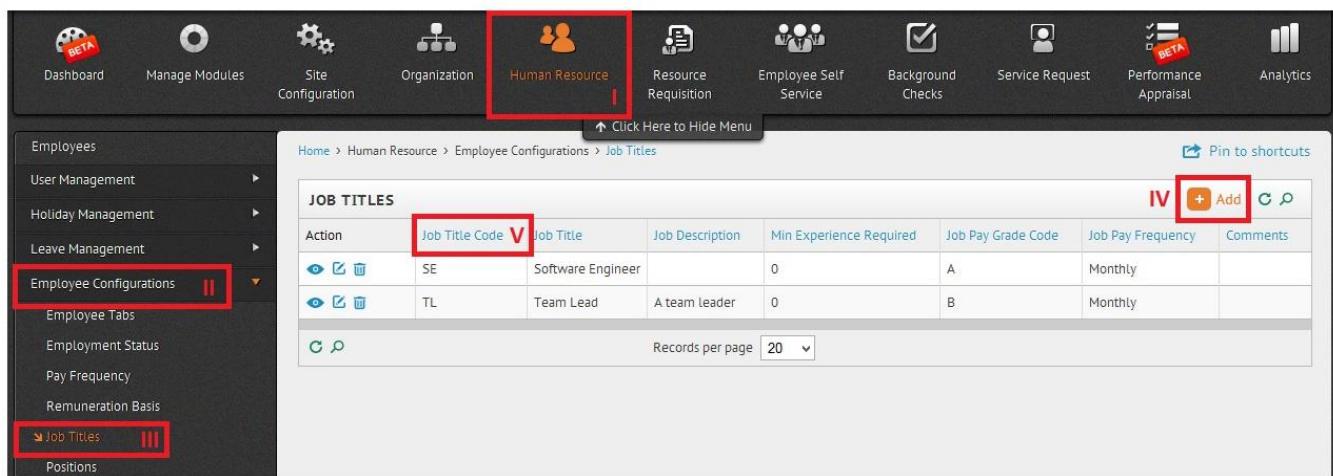
Note: You can only enter departments that are existing in the application

**g. Enter the Reporting Manager employee id**

**h. Job Title**

- I. Click on Human Resource in the top menu
- II. Click on Employee Configurations in the left side panel
- III. Click on Job Titles link
- IV. Click on Add button to add the desired job title
- V. Use the Job Title Code to enter in the import excel

Refer Figure 77



Action	Job Title Code	Job Title	Job Description	Min Experience Required	Job Pay Grade Code	Job Pay Frequency	Comments
	SE	Software Engineer		0	A	Monthly	
	TL	Team Lead	A team leader	0	B	Monthly	

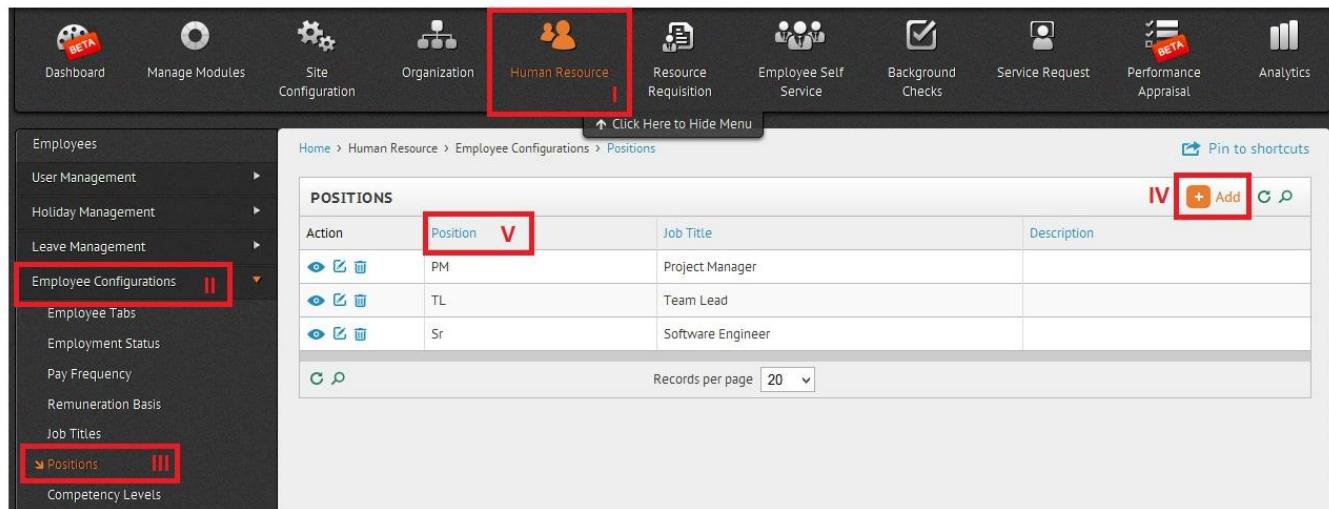
Figure 77

Note: You can only enter job titles that are existing in the application

### i. Position

- I. Click on Human Resource in the top menu
- II. Click on Employee Configurations in the left side panel
- III. Click on Positions link
- IV. Click on Add button to add the desired position
- V. Use the Position to fill in the import excel
- VI. Please make sure that Position should fall under the Job Titles entered in import excel

Refer Figure 78



Action	Position	Job Title	Description
	PM	Project Manager	
	TL	Team Lead	
	Sr	Software Engineer	

Figure 78

Note: You can only enter positions that are existing in the application

**j. Employment Status**

- I. Click on Human Resource in the top menu
  - II. Click on Employee Configurations in the left side panel
  - III. Click on Employment Status
  - IV. Click on Add button to add the desired status
  - V. Use the Work Short Code to enter in the import excel

Refer Figure 79

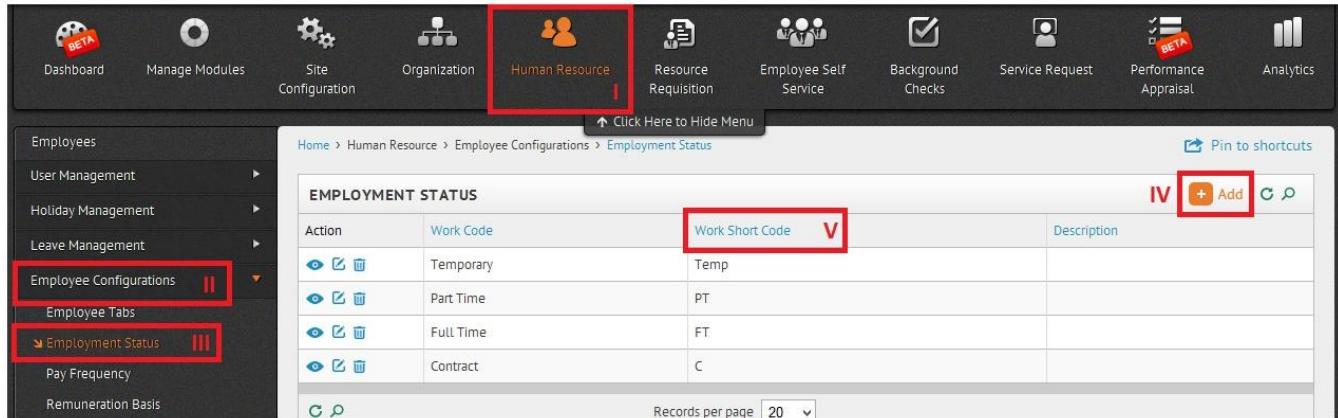


Figure 79

Note: You can only enter work short codes that are existing in the application

k. Enter the employee Date of Joining in “Day, month and four digit year with dashes” format

- I. This is a mandatory field

Refer Figure 80 for guidance

Figure 80

**I. Enter the employee Date of Leaving**

- I. Date of Leaving column can be left empty unless the employee Employment status is “Left”, “Suspended”, or “Resigned”
  - II. Date of Leaving must be greater than the Date of Joining

Refer Figure 81

K	L	M
of joining	Date of leaving	Experience

Figure 81

#### m. Enter the employee Experience

- I. This field is not mandatory

Refer Figure 82

L	M	N
te of leaving	Experience	Extension

Figure 82

n. Enter the employee Extension

- I. This field is not mandatory

Refer Figure 83

M	N
xperience	Extension

Figure 83

**o. Enter the employee Work Telephone Number**

- I. This field is not mandatory

Refer Figure 84

Extension	Work telephone number	Fax

Figure 84

p. Enter the employee Fax

- I. This field is not mandatory

Refer Figure 85

O	P	Q
Phone number	Fax	

Figure 85

**q. Salary Currency**

- I. Click on Site Configurations in the top menu
  - II. Click on Currency in the left side panel
  - III. Click on Currencies
  - IV. Click on Add button to add the desired status
  - V. Use the Currency Code to enter in the import excel

Refer Figure 86

The screenshot shows the 'Site Configuration' module selected in the top navigation bar. The left sidebar contains links for Site Preferences, General, Locations, Currency (highlighted with a red box), Currencies (highlighted with a red box), and Currency Conversions. The main content area displays a list of currencies with columns for Action, Currency, Currency Code, and Description. A modal window titled 'CURRENCIES' is open, showing two rows: Indian Rupee (INR) and US Dollar (USD). Buttons for Add, Refresh, and Search are visible at the top of the modal. A tooltip 'Click Here to Hide Menu' points to the top right of the sidebar.

Action	Currency	Currency Code	Description
	Indian Rupee	INR	
	US Dollar	USD	

Figure 86

Note: You can only enter Currencies that are existing in the application

r. Pay Frequency

- I. Click on Human Resource in the top menu
  - II. Click on Employee Configurations in the left side panel
  - III. Click on Payment Frequency
  - IV. Click on Add button to add the desired status
  - V. Use the Short Code to enter in the import excel

Refer Figure 87

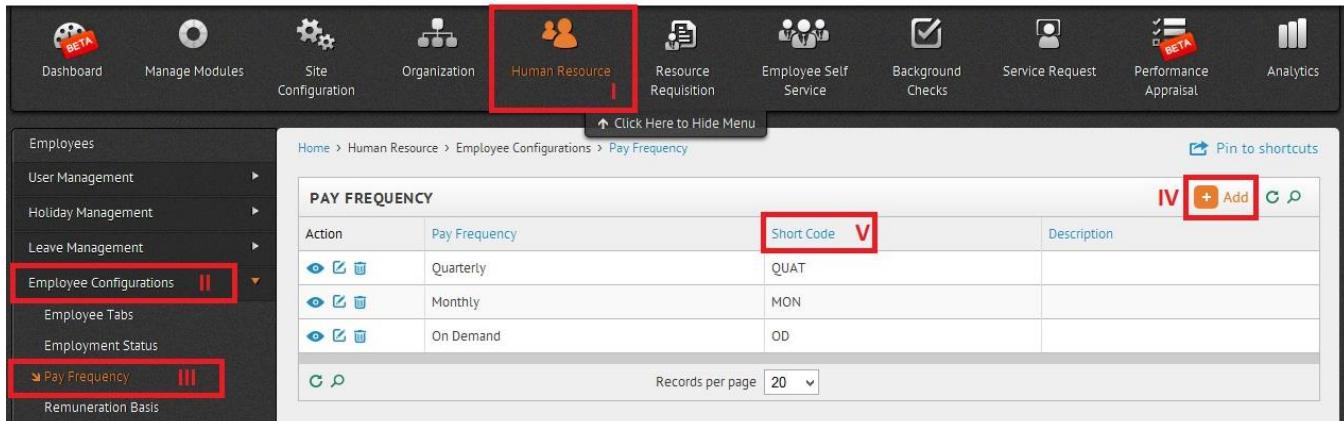


Figure 87

Note: You can only enter Pay Frequencies that are existing in the application

**s. Enter the employee Salary**

- I. This field is not mandatory

Refer Figure 88



Figure 88

## Performance Appraisal

Performance Appraisal is a systematic evaluation of performance of the employees and to understand the abilities of a person for further career transition. It is generally done by the supervisors based on measuring criterion such as parameters, questions, ratings and more.

In Sentrifugo, the appraisal is configured for an entire business unit or for a specific department in a business unit.

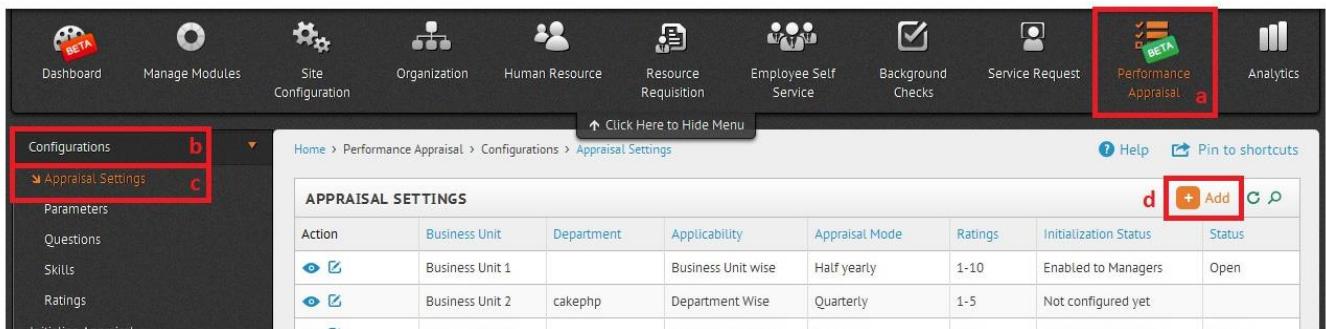
To configure the appraisal process, first the appraisal settings for the selected business unit or department must be configured.

## Appraisal Settings

Appraisal Settings set the mode and ratings for the selected business unit or department. The appraisal mode can be quarterly, half yearly, or yearly. The ratings can be 1-5 or 1-10 depending on the appraisal architecture of the organization. Ratings are provided with description signifying each ratings definition in the appraisal process.

- a. Click on Performance Appraisal in the header
- b. Click on Configurations on the left side panel
- c. Click on Appraisal Settings submenu
- d. Click on Add in the right side panel

Refer Figure 89



APPRaisal SETTINGS							
Action	Business Unit	Department	Applicability	Appraisal Mode	Ratings	Initialization Status	Status
	Business Unit 1		Business Unit wise	Half yearly	1-10	Enabled to Managers	Open
	Business Unit 2	cakephp	Department Wise	Quarterly	1-5	Not configured yet	

Figure 89

In Add Appraisal Settings screen,

- e. Select an option in Business Unit dropdown
- f. Select the applicability
- g. Select the department based on the previous selections
- h. Select an option in Appraisal Mode dropdown
- i. Select an option in Appraisal Ratings dropdown
- j. Click on Save to save the Appraisal Settings

Refer Figure 90

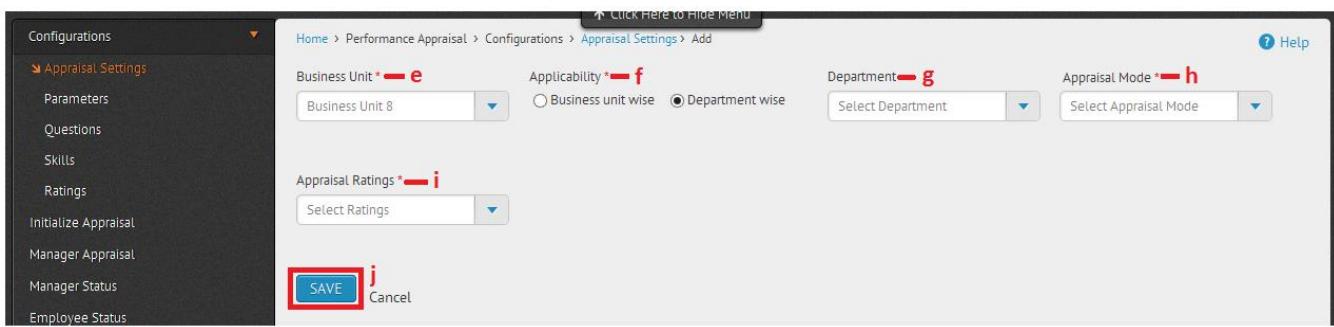


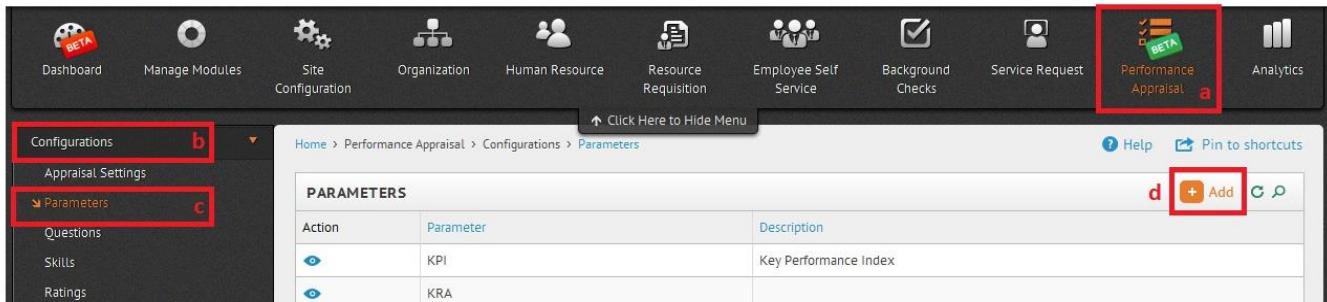
Figure 90

## Parameters

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

- a. Click on Performance Appraisal in the header
- b. Click on Configurations on the left side panel
- c. Click on Parameters submenu
- d. Click on Add in the right side panel

Refer Figure 91



Action	Parameter	Description
①	KPI	Key Performance Index
②	KRA	

Figure 91

In the Add Parameters screen,

- e. Enter the parameter
- f. Provide description if necessary
- g. Click on Save to add the parameter

Refer Figure 92

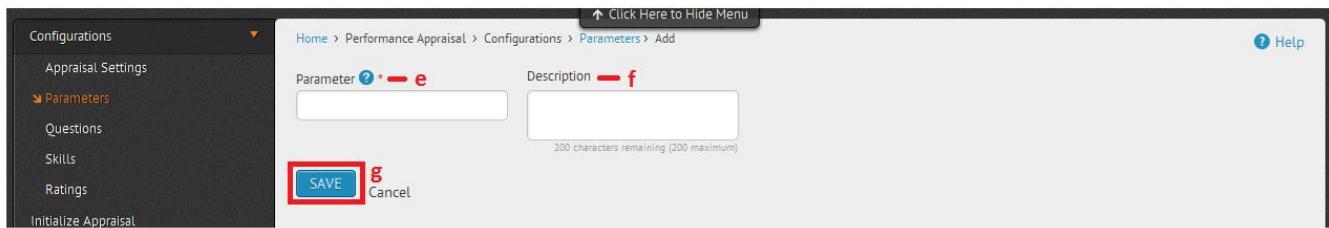


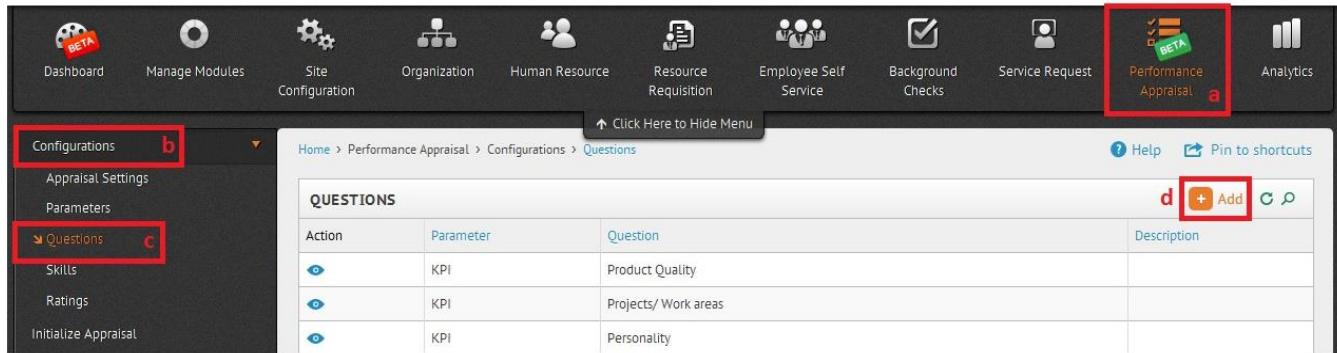
Figure 92

## Questions

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

- a. Click on Performance Appraisal in the header
- b. Click on Configurations on the left side panel
- c. Click on Questions submenu
- d. Click on Add in the right side panel

Refer Figure 93



Action	Parameter	Question	Description
①	KPI	Product Quality	
②	KPI	Projects/ Work areas	
③	KPI	Personality	

Figure 93

In the Add Questions screen,

- e. Select an option from the parameters dropdown
- f. Add other parameter by clicking Add Parameter
- g. Enter the question
- h. Provide description if necessary
- i. Click on “Add New Question” to add questions for the selected parameter
- j. Click on Save to add questions for the selected parameter

Refer Figure 94

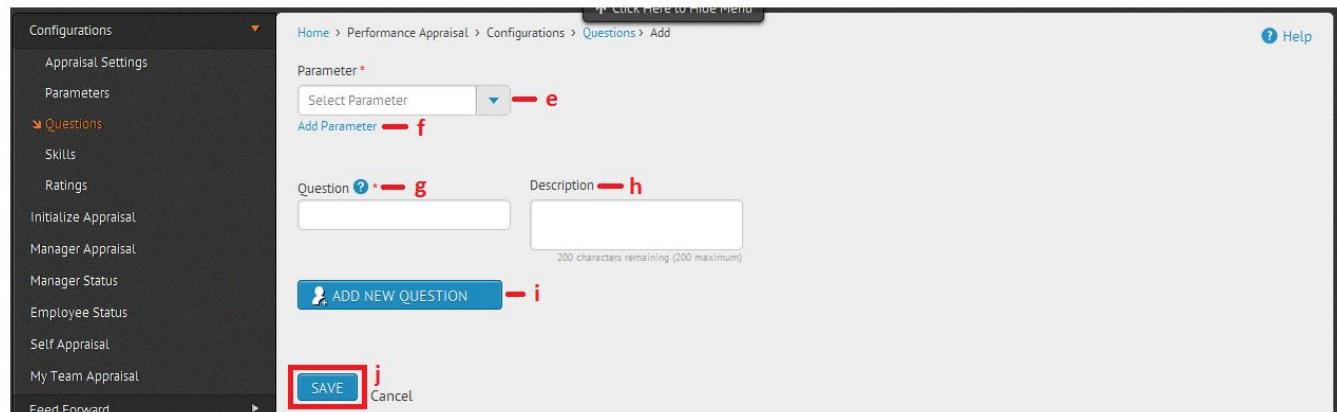


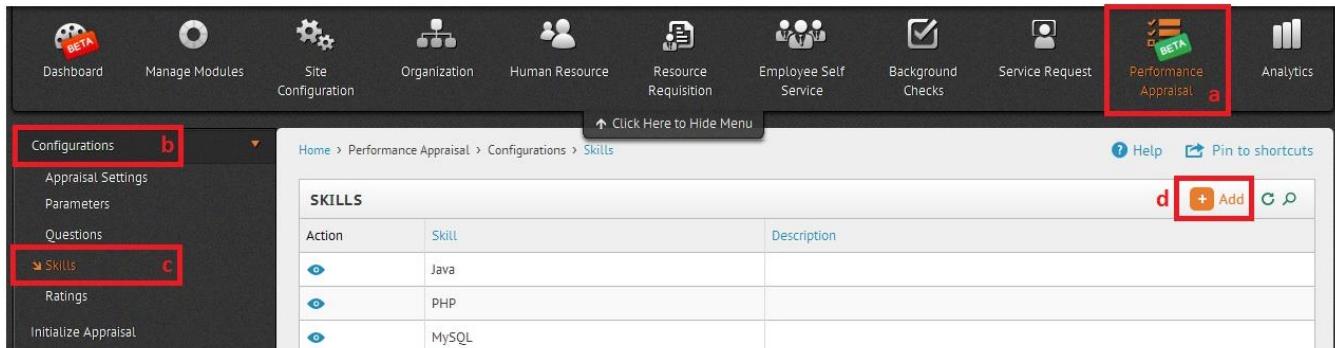
Figure 94

## Skills

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

- a. Click on Performance Appraisal in the header
- b. Click on Configurations on the left side panel
- c. Click on Skills submenu
- d. Click on Add in the right side panel

Refer Figure 95



The screenshot shows the Sentrifugo web application. At the top, there is a navigation bar with various icons and links: Dashboard, Manage Modules, Site Configuration, Organization, Human Resource, Resource Requisition, Employee Self Service, Background Checks, Service Request, and Analytics. The 'Performance Appraisal' link is highlighted with a red box and labeled 'a'. Below the navigation bar is a secondary menu titled 'Click Here to Hide Menu' which includes 'Configurations' (highlighted with a red box and labeled 'b'), 'Appraisal Settings', 'Parameters', 'Questions', 'Skills' (highlighted with a red box and labeled 'c'), 'Ratings', and 'Initialize Appraisal'. The main content area is titled 'SKILLS' and contains a table with three rows:

Action	Skill	Description
	Java	
	PHP	
	MySQL	

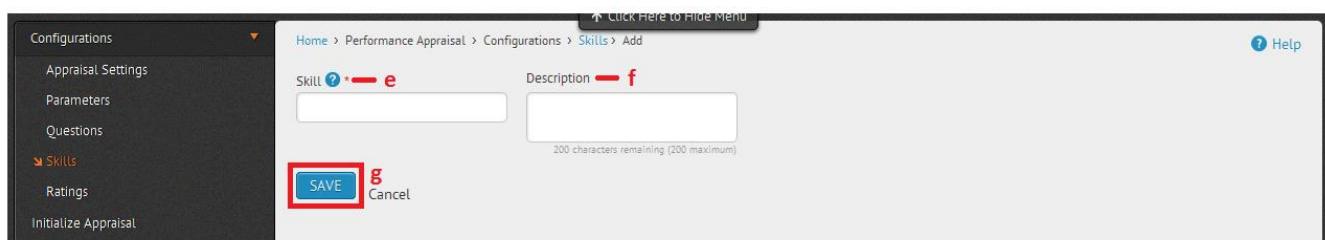
On the far right of the table, there is an 'Add' button highlighted with a red box and labeled 'd'.

Figure 95

In the Add Skills screen,

- e. Enter the skill
- f. Provide description if necessary
- g. Click on Save to add the skill

Refer Figure 96



The screenshot shows the 'Add Skills' form. On the left, there is a sidebar with 'Configurations' (highlighted with a red box), 'Appraisal Settings', 'Parameters', 'Questions', 'Skills' (highlighted with a red box), 'Ratings', and 'Initialize Appraisal'. The main form has two input fields: 'Skill' (highlighted with a red box and labeled 'e') and 'Description' (highlighted with a red box and labeled 'f'). Below the 'Skill' field is a note: '200 characters remaining (200 maximum)'. At the bottom of the form are two buttons: 'SAVE' (highlighted with a red box and labeled 'g') and 'Cancel'.

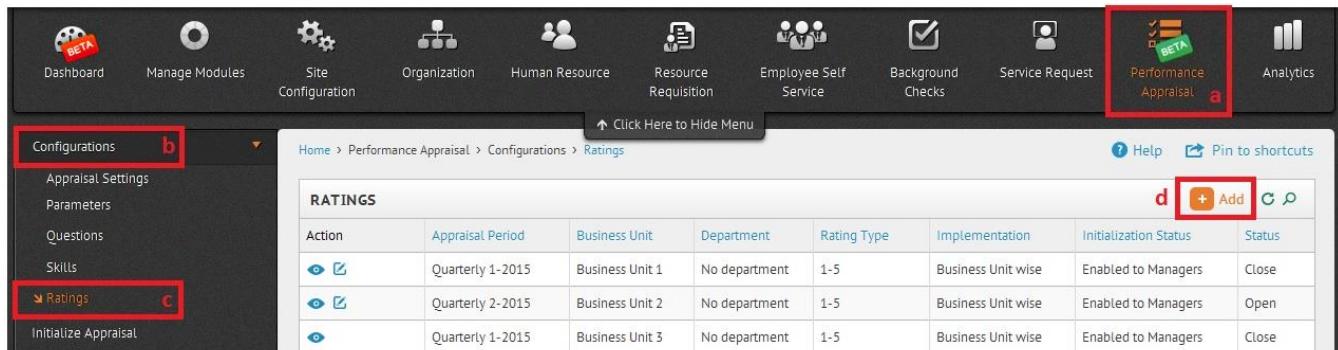
Figure 96

## Ratings

Ratings are defined for each business unit or department for which the appraisal settings are previously configured. The rating scale, 1-5 and 1-10, is decided as per the standards of the organization for appraisal process.

- a. Click on Performance Appraisal in the header
- b. Click on Configurations on the left side panel
- c. Click on Ratings submenu
- d. Click on Add in the right side panel

Refer Figure 97



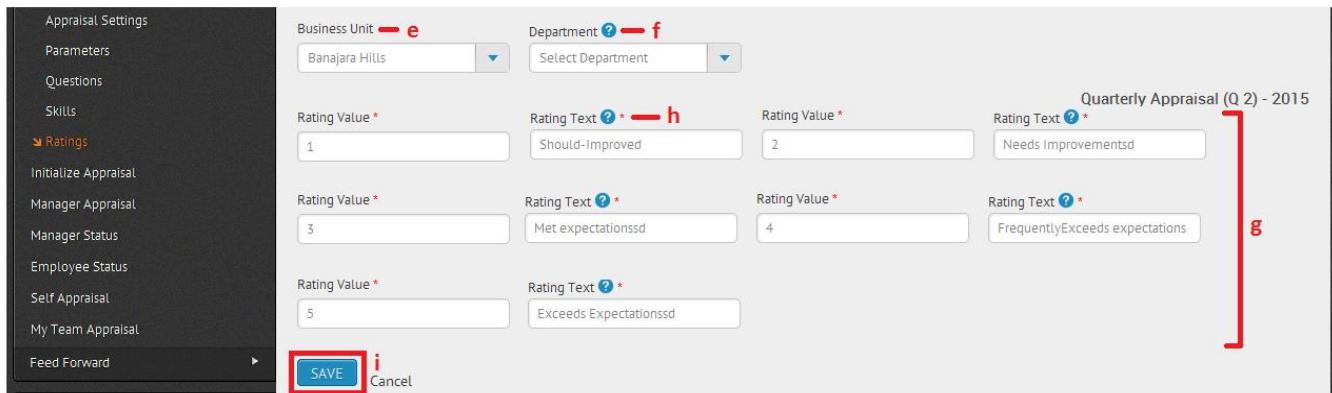
Action	Appraisal Period	Business Unit	Department	Rating Type	Implementation	Initialization Status	Status
<input type="checkbox"/> <input checked="" type="checkbox"/>	Quarterly 1-2015	Business Unit 1	No department	1-5	Business Unit wise	Enabled to Managers	Close
<input type="checkbox"/> <input checked="" type="checkbox"/>	Quarterly 2-2015	Business Unit 2	No department	1-5	Business Unit wise	Enabled to Managers	Open
<input type="checkbox"/>	Quarterly 1-2015	Business Unit 3	No department	1-5	Business Unit wise	Enabled to Managers	Close

Figure 97

In the Add ratings screen,

- e. Select an option from Business Unit dropdown
- f. Select an option from Department dropdown
- g. The Appraisal Ratings range selected in Appraisal Settings for the selected Business Unit and Department are auto populated
- h. Provide rating text for each rating value
- i. Click on Save to add the ratings

Refer Figure 98



Rating Value *	Rating Text ? *	Rating Value *	Rating Text ? *
1	Should-Improved	2	Needs Improvementsd
3	Met expectationssd	4	FrequentlyExceeds expectations
5	Exceeds Expectationssd		

Figure 98

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

## Initialize Appraisal

In the initialization step, the business units or the departments that have their appraisal settings configured will be displayed.

- Business unit: All the Business Units which have the Appraisal Settings configured will be displayed
  - Frequency: Based on the appraisal settings for the selected business unit, frequency will be auto populated
  - Period: Period will be calculated dynamically based on the previously configured appraisal for the selected business unit
  - Appraisal Status: Appraisal status will be "Open" by default. Upon the initialization of appraisal, close and force close options will be made available
    - Force Close: Closes the Appraisal Process by force. Appraisal Process for the selected Business Unit can be configured again and for the same appraisal period
    - Close: Closes the appraisal process for the selected business unit permanently
  - Enable to: The Appraisal Process will be enabled by default to managers. When the settings are saved, the Appraisal Process will be made available for managers to configure the questions under the selected parameters. If the appraisal is directly made available for the employees, they will be able to view the questions configured by the HR.
  - Due Date: The due date is for closing the appraisal process for managers or employees
  - Consider Management: To consider management group for appraisal process for the selected period, check the respective checkbox
  - Eligibility: Select the employees eligible for appraisal period based on the employee status
  - Parameters: Select the parameters for appraisal process that will be applicable to the employees
  - Ratings : The ratings configured in appraisal setting for a business unit or department will be auto-populated
- a. Click on Performance Appraisal in the header
  - b. Click on Initialize Appraisal in the left side panel
  - c. Click on Add in the right side panel

Refer Figure 99



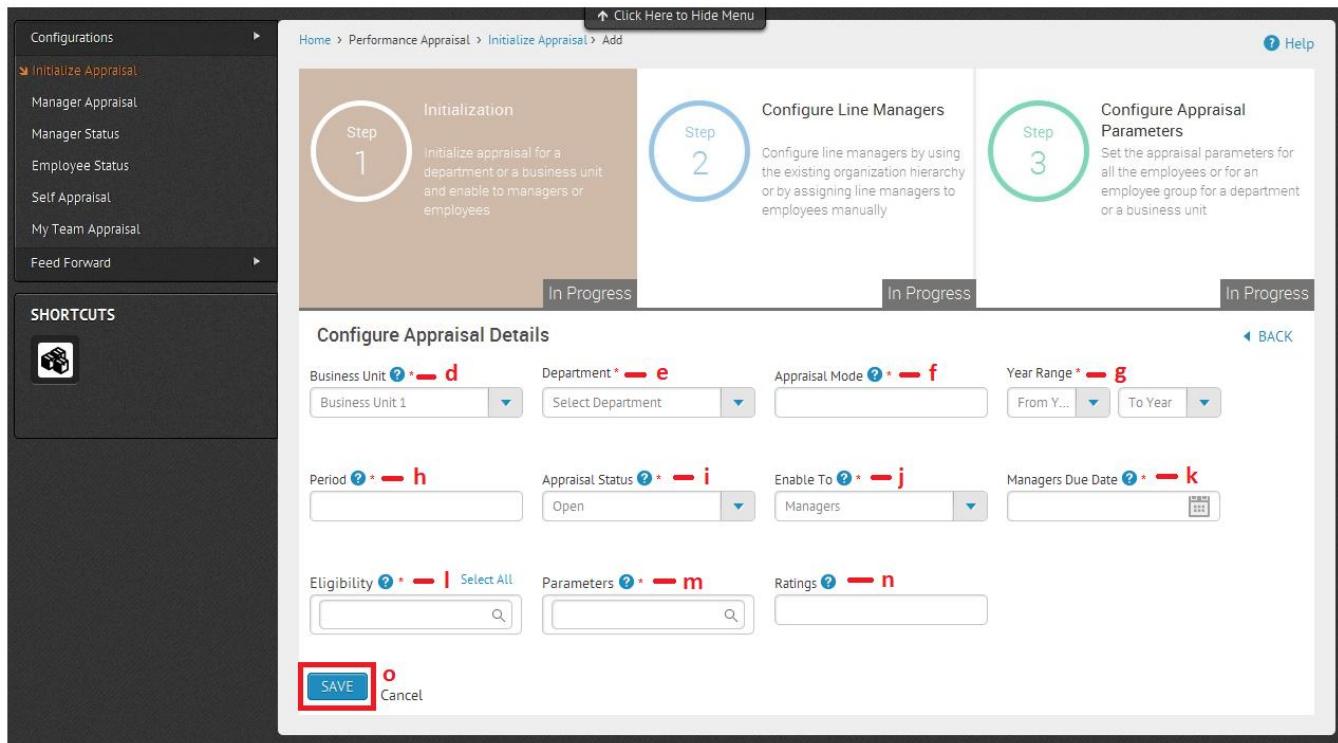
Action	Business Unit	Department	Financial Year	Mode	Period	Status	Process Status
<input checked="" type="checkbox"/> Business Unit 1			2015-2016	Half yearly	H1	Open	Enabled to Managers
<input checked="" type="checkbox"/> Business Unit 2			2015-2016	Quarterly	Q2	Open	Enabled to Managers

Figure 99

In the Add Initialize Appraisal screen,

- d. All the business units for which the appraisal settings are configured are populated. Select an option from business unit dropdown
- e. Select an option from the department dropdown
- f. Based on the selected business unit and department, the appraisal mode is populated
- g. Select the year range
- h. Period will be dynamically calculated and populated
- i. Appraisal Status is by default Open in Initialize appraisal
- j. Select an option in Enable To dropdown
- k. Based on the Enable To option, set a due date to the employees or to managers
- l. Select more than one eligibility criteria for employees who are eligible for the appraisal process
- m. Select more than one parameters
- n. Ratings will be auto populated
- o. Click on Save to initialize appraisal for a business unit or a department

Refer Figure 100



The screenshot shows the 'Initialize Appraisal' screen in the Sentrifugo application. The left sidebar has a 'Configurations' menu with 'Initialize Appraisal' selected. The main area shows three steps: Step 1 (Initialization) is active and in progress; Step 2 (Configure Line Managers) and Step 3 (Configure Appraisal Parameters) are also in progress. The 'Configure Appraisal Details' section contains fields for Business Unit (d), Department (e), Appraisal Mode (f), Year Range (g), Period (h), Appraisal Status (i), Enable To (j), Managers Due Date (k), Eligibility (l), Parameters (m), and Ratings (n). The 'SAVE' button at the bottom is highlighted with a red box.

Figure 100

## Configure Line Managers

Once the appraisal process is initiated for a department or a business unit, the line managers must be configured so as to evaluate the employees' appraisal.

The Line Managers can be configured in the appraisal process in two ways:

1. Choose by Organization Hierarchy
  - Establish appraisal process as per the organization hierarchy where line manager will be same as the reporting manager
  - 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
  
- a. Click on Choose by Organization Hierarchy
- b. Click Yes in the Confirmation alert box

Refer Figure 101

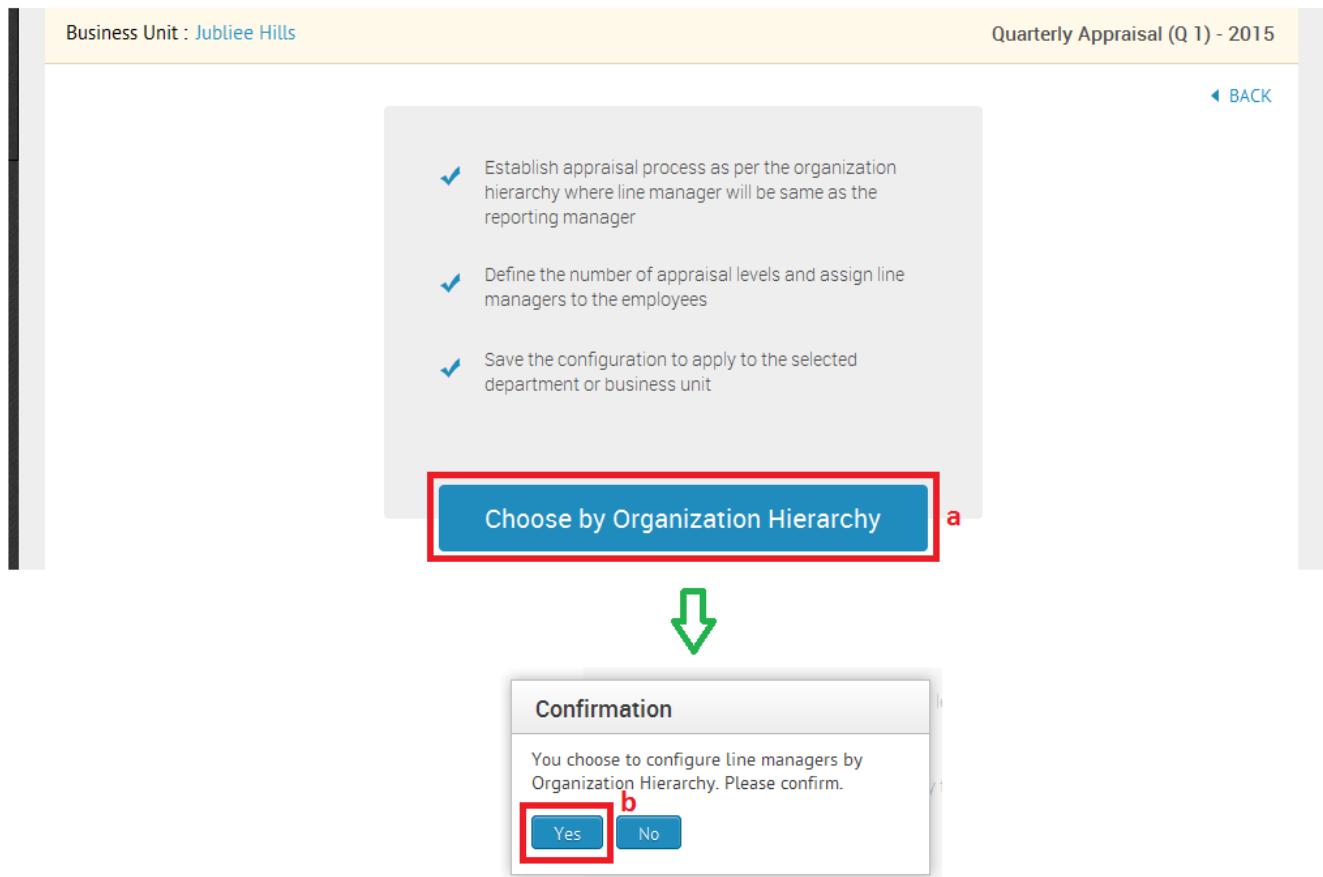


Figure 101

- c. Manager and the employees under the manager are displayed
- d. On the right side, configure line managers by selected the number of appraisal levels
- e. Click on Save

Refer Figure 102

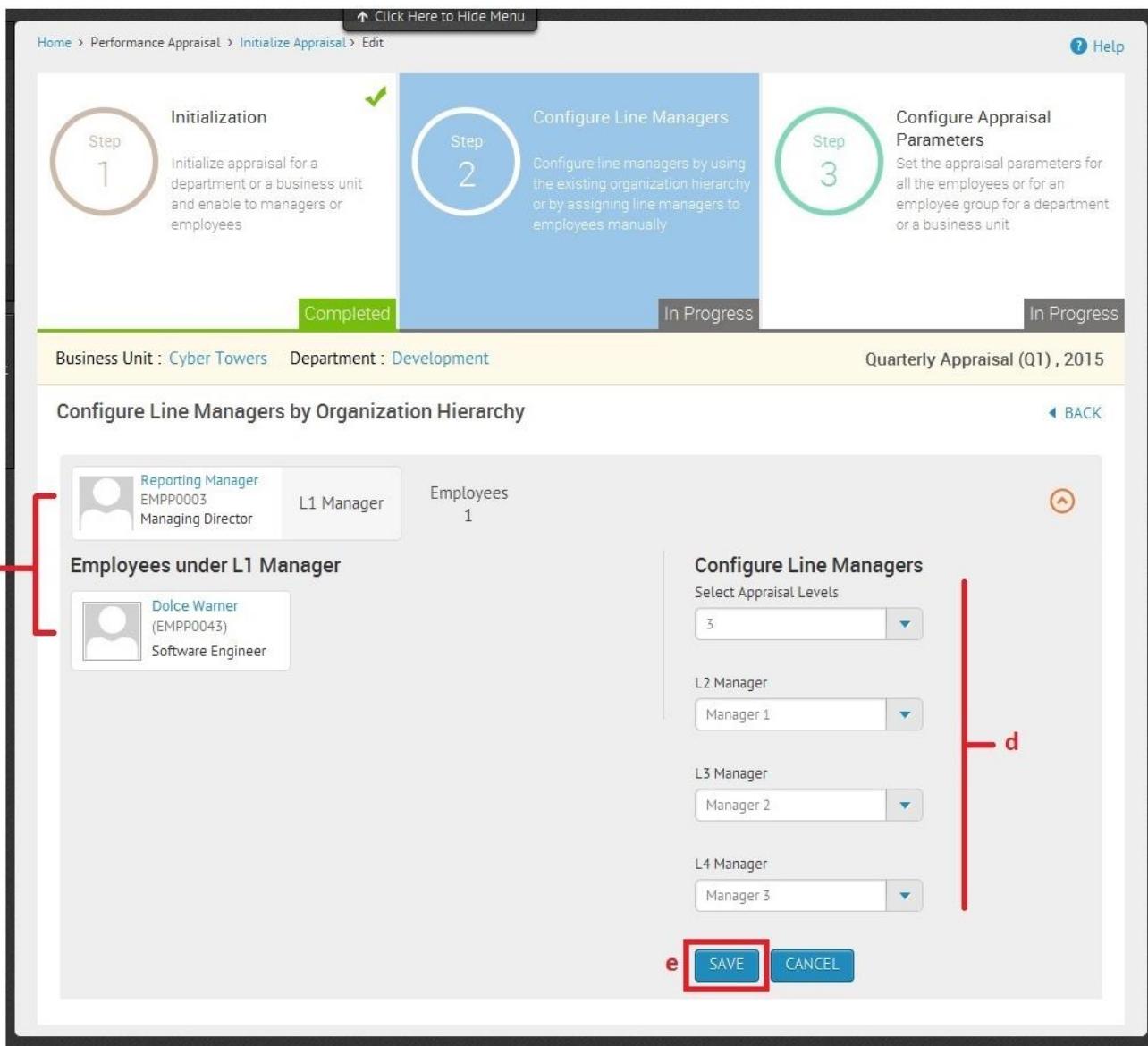


Figure 102

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

- a. Click on Assign Line Managers to Employees
- b. Click Yes in the Confirmation alert box

Refer Figure 103

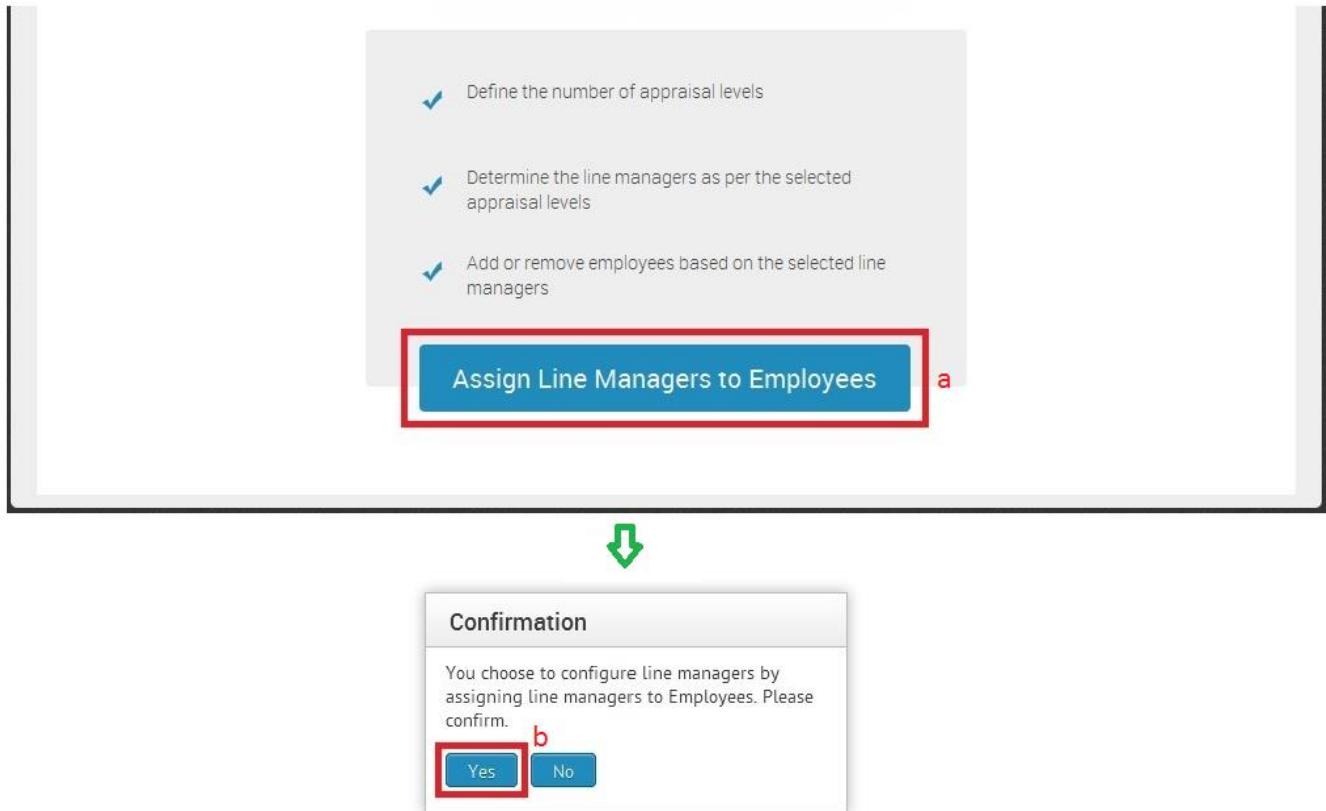


Figure 103

- c. Click on Add Managers link
- d. Select the number of appraisal levels
- e. Based on the number of appraisal levels, select the line managers
- f. Employees are displayed in the left side panel
- g. Click on the employee to select for appraisal process
- h. Click on Save

Refer Figure 104

↑ Click Here to Hide Menu

Home > Performance Appraisal > Initialize Appraisal > Edit ? Help

Step 1
Initialization
Completed

Step 2
Configure Line Managers
In Progress

Step 3
Configure Appraisal Parameters
In Progress

Business Unit : Cyber Towers Department : Development Quarterly Appraisal (Q1) , 2015

Configure Line Managers ◀ BACK

+Add Managers — c

Select Appraisal Levels  
2 — d

L1 Manager L2 Manager  
Manager 1 Manager 2 — e

Employees (Click on an employee to add to group)  
Search Employee — f

Employees (Click on an employee to remove)  
Search Employee — g

Dolce Warner EMPP0043 Software Engineer — f

Jack Allen EMPP0045 Software Engineer — g

SAVE — h Cancel

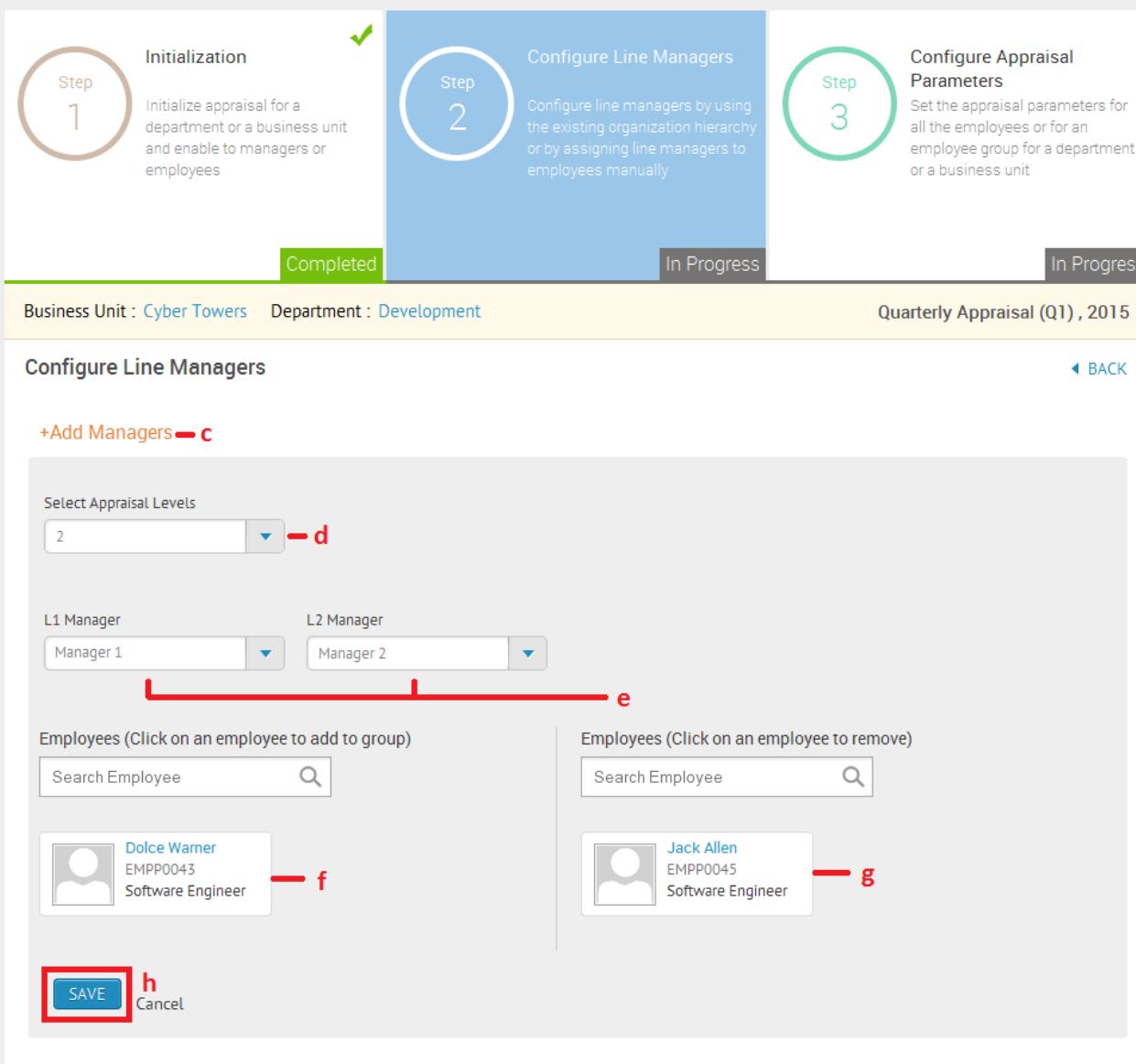


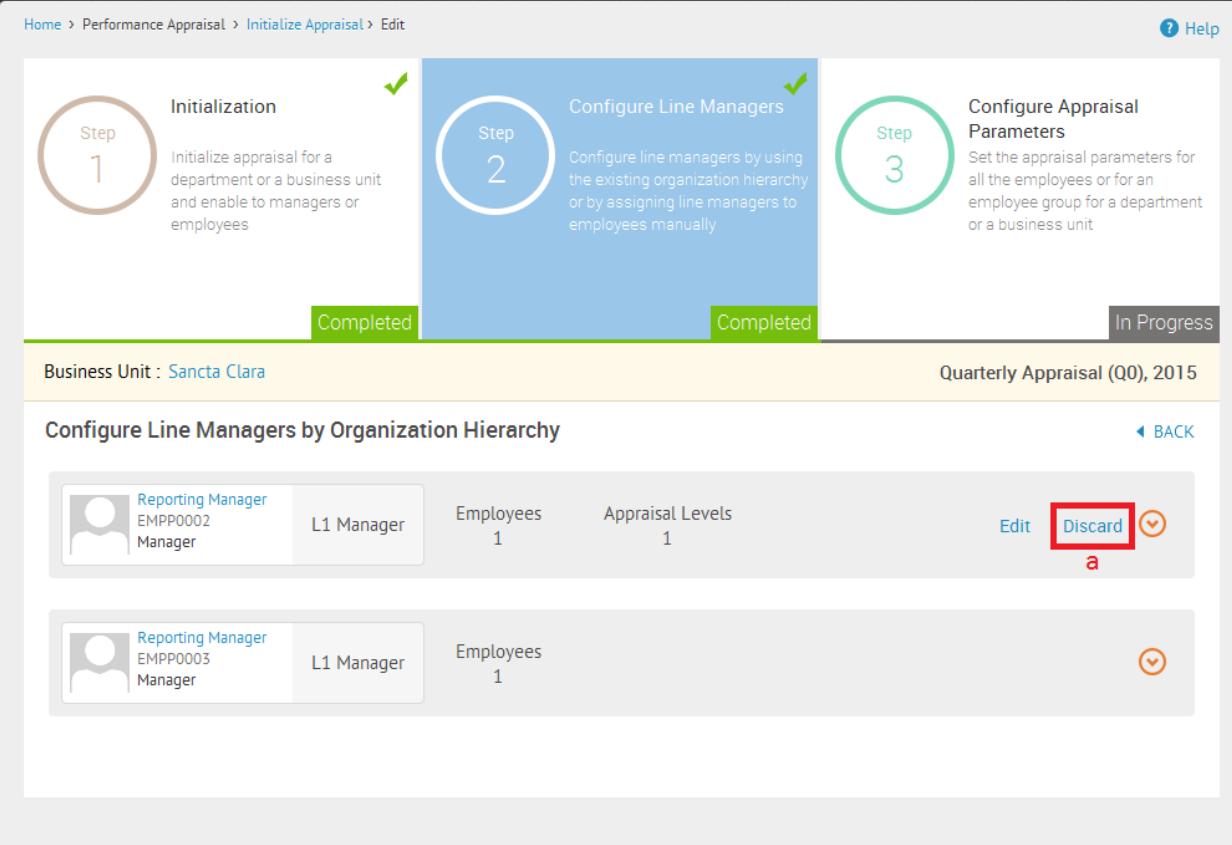
Figure 104

## Discard Line Manager Configuration

You can discard the line managers' configuration after saving the appraisal process in step two.

- Click on Discard to discard the line manager configurations

Refer Figure 105



The screenshot shows the 'Initialize Appraisal' wizard with three steps:

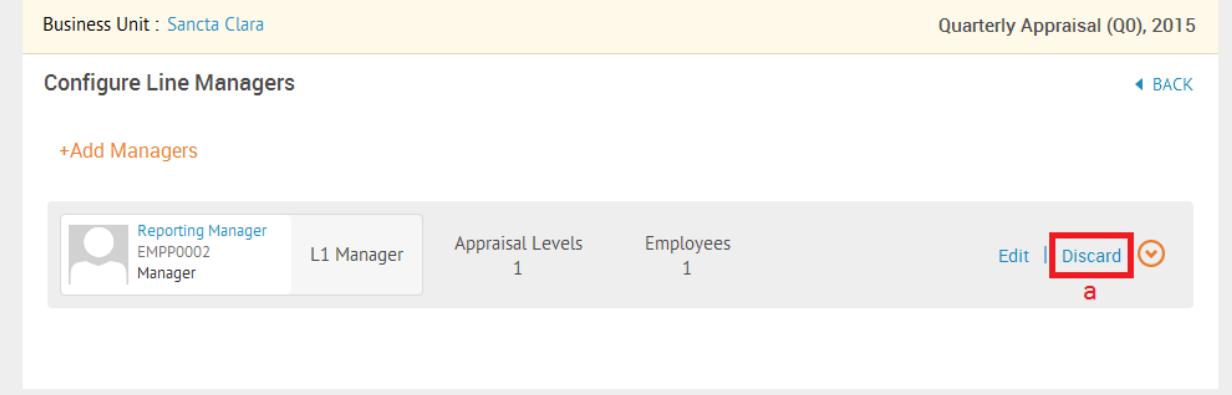
- Step 1 Initialization:** Initialize appraisal for a department or a business unit and enable to managers or employees. Status: Completed.
- Step 2 Configure Line Managers:** Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually. Status: Completed.
- 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. Status: In Progress.

Below the steps, it says "Business Unit : Sancta Clara" and "Quarterly Appraisal (Q0), 2015".

In the "Configure Line Managers by Organization Hierarchy" section, there are two entries:

- Reporting Manager EMPP0002 Manager (L1 Manager) - Employees 1, Appraisal Levels 1. Buttons: Edit, Discard (highlighted with a red box).
- Reporting Manager EMPP0003 Manager (L1 Manager) - Employees 1. Buttons: Edit, Discard (highlighted with a red box).

OR



The screenshot shows the "Configure Line Managers" page with the following details:

- Business Unit : Sancta Clara
- Quarterly Appraisal (Q0), 2015
- Configure Line Managers
- +Add Managers
- Reporting Manager EMPP0002 Manager (L1 Manager) - Appraisal Levels 1, Employees 1. Buttons: Edit, Discard (highlighted with a red box).

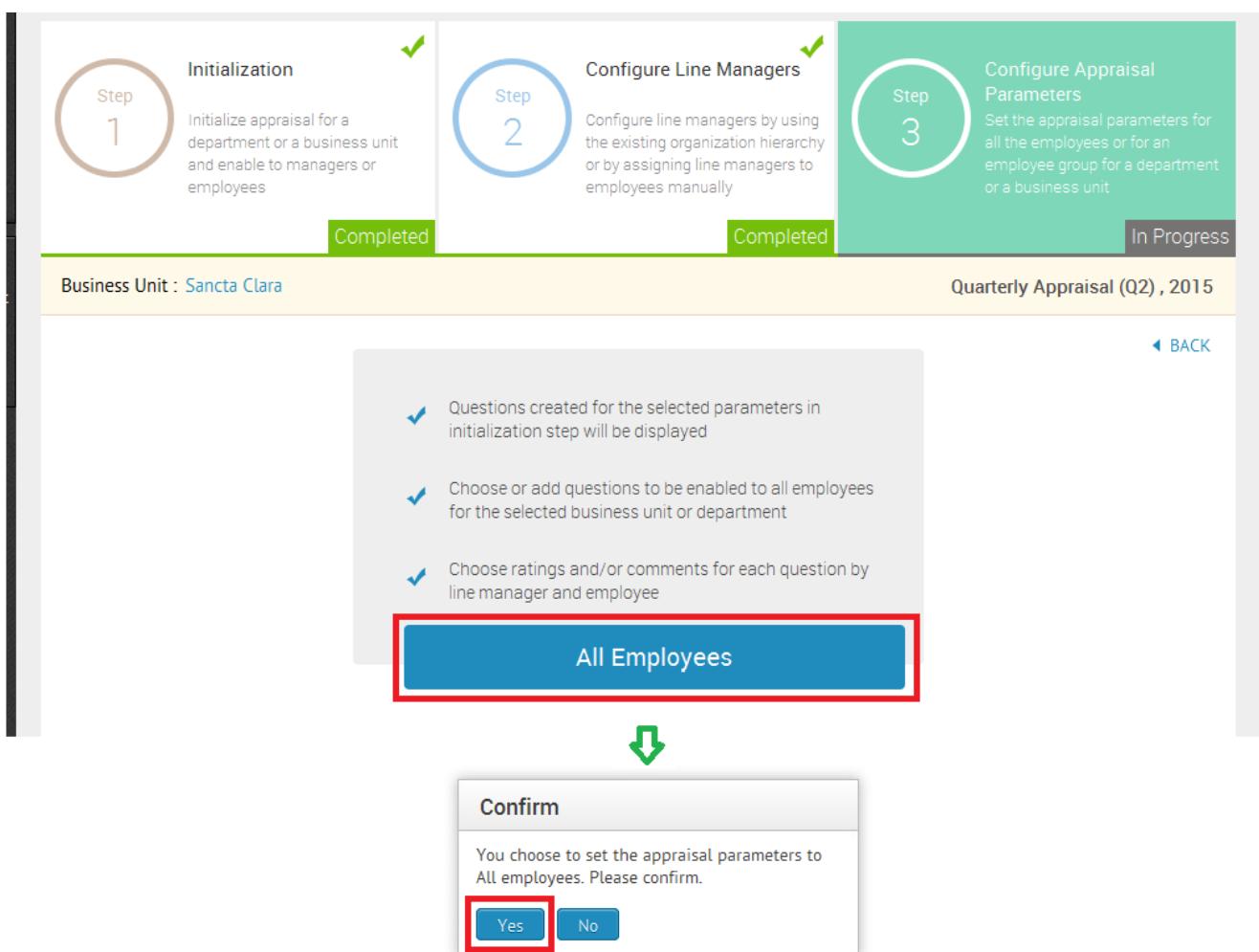
Figure 105

## Configure Appraisal Parameters

Configure the appraisal parameters after configuring the line managers. Here, the appraisal process can be made applicable to employees. 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
  
- a. Click on Assign Line Managers to Employees
- b. Click Yes in the Confirmation alert box

Refer Figure 106



The screenshot shows a three-step process for appraisal configuration:

- Step 1 Initialization**: Initialize appraisal for a department or a business unit and enable to managers or employees. Status: Completed.
- Step 2 Configure Line Managers**: Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually. Status: Completed.
- 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. Status: In Progress.

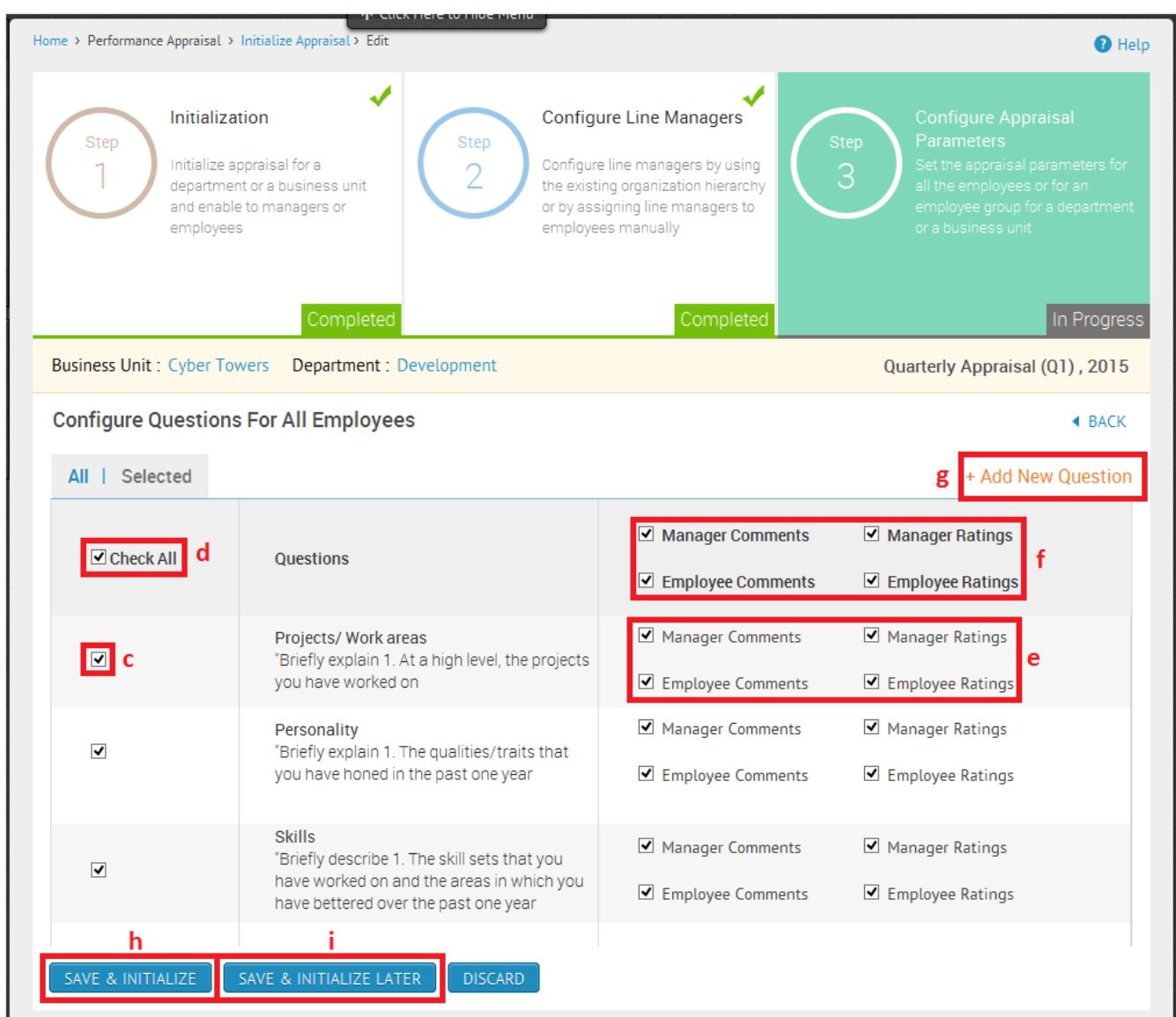
Below the steps, it says "Business Unit : Sancta Clara" and "Quarterly Appraisal (Q2) , 2015".

A callout box highlights the "All Employees" button, which is enclosed in a red rectangle. Below this, a "Confirm" dialog box asks "You choose to set the appraisal parameters to All employees. Please confirm." with "Yes" and "No" buttons, where "Yes" is also highlighted with a red rectangle.

Figure 106

- 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. Select ratings or comments of manager or employee individually for all the questions  
Or
- f. Select ratings or comments of manager or employee by checking the Manager Rating, Manager Comments, Employee Ratings and Employee Comments
- g. Click on Add New Question to add more questions to the appraisal process
- h. Click on Save & Initialize to initialize the appraisal
- Or
- i. Click on Save & Initialize Later to only save the appraisal process

Refer Figure 107



The screenshot shows the 'Performance Appraisal > Initialize Appraisal > Edit' screen. It displays three steps:

- Step 1 Initialization**: Completed.
- Step 2 Configure Line Managers**: Completed.
- Step 3 Configure Appraisal Parameters**: In Progress.

Below the steps, it shows the Business Unit: Cyber Towers and Department: Development, and the Quarterly Appraisal (Q1), 2015.

The main content area is titled "Configure Questions For All Employees". It includes a table with columns for Questions, Manager Comments, Manager Ratings, Employee Comments, and Employee Ratings.

Annotations with letters:

- d**: A red box surrounds the "Check All" checkbox in the first row.
- c**: A red box surrounds the checkbox in the second row under "Projects/ Work areas".
- h**: A red box surrounds the "SAVE & INITIALIZE" button at the bottom.
- i**: A red box surrounds the "SAVE & INITIALIZE LATER" button at the bottom.
- g**: A red box surrounds the "+ Add New Question" button.
- f**: A red box surrounds the "Manager Comments" and "Manager Ratings" checkboxes in the first row of the table.
- e**: A red box surrounds the "Employee Comments" and "Employee Ratings" checkboxes in the second row of the table.
- j**: A red box surrounds the "Manager Comments" and "Manager Ratings" checkboxes in the third row of the table.
- k**: A red box surrounds the "Employee Comments" and "Employee Ratings" checkboxes in the fourth row of the table.

Figure 107

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
- a. Click on Customized Employees Groups
  - b. Click Yes in the Confirmation alert box

Refer Figure 108

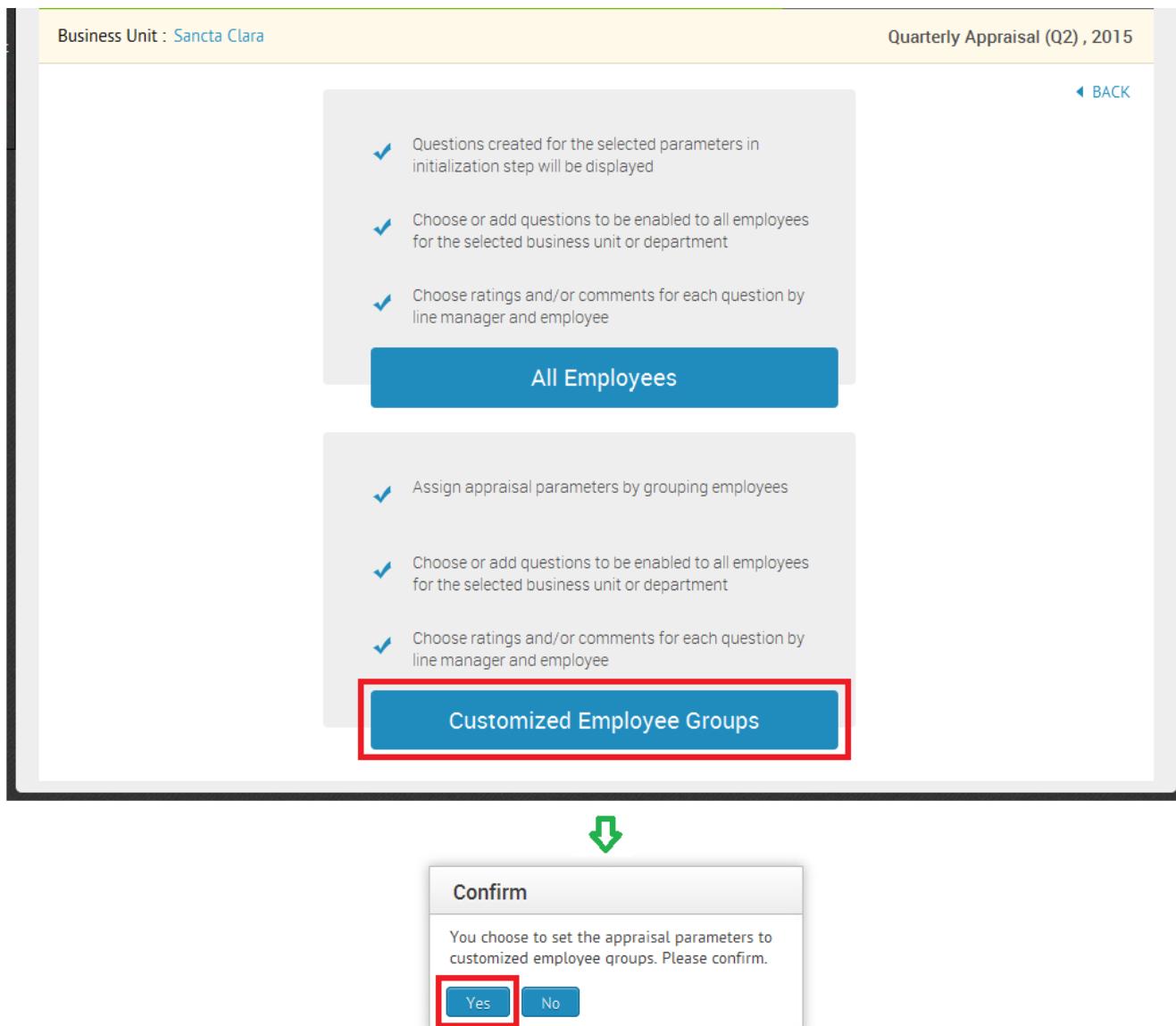


Figure 108

- c. Click on Create New Group
- d. Enter group name

- e. Select employees applicable for the appraisal process
- f. Select Questions individually by checking the checkbox respective to each question
- Or
- g. Select all the questions by checking the Check All option in the table header
- h. Select ratings or comments of manager or employee individually for all the questions
- Or
- i. Select ratings or comments of manager or employee by checking the Manager Rating, Manager Comments, Employee Ratings and Employee Comments
- j. Click on Add New Question to add more questions to the appraisal process
- k. Click on Save to Configure Appraisal Parameters

Refer Figure 109

Business Unit : Cyber Towers
Department : Development
Quarterly Appraisal (Q1) , 2015

Customized Employee Groups
[◀ BACK](#)

[CREATE NEW GROUP](#)
[DISCARD](#)

Group Name \* — d

Employees

Search Employee

**Dolce Warner**  
 (EMPP0043)  
 Software Engineer

Selected Employees (0)

Search Employee

Add employees to group.

All | Selected
[+ Add New Question](#)

<input checked="" type="checkbox"/> Check All	Questions	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings
<input checked="" type="checkbox"/>	Projects/ Work areas "Briefly explain 1. At a high level, the projects you have worked on"	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings
<input checked="" type="checkbox"/>	Personality "Briefly explain 1. The qualities/traits that you have honed in the past one year"	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings
<input checked="" type="checkbox"/>	Skills "Briefly describe 1. The skill sets that you have worked on and the areas in which you have bettered over the past one year"	<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](#)
[k Close](#)

Figure 109

- I. Upon Saving the appraisal parameters, click on initialize to initialize the appraisal process
- m. Click on Initialize Later to only save the appraisal process
- n. Click on Yes in the confirmation box to initialize the appraisal

Refer Figure 110

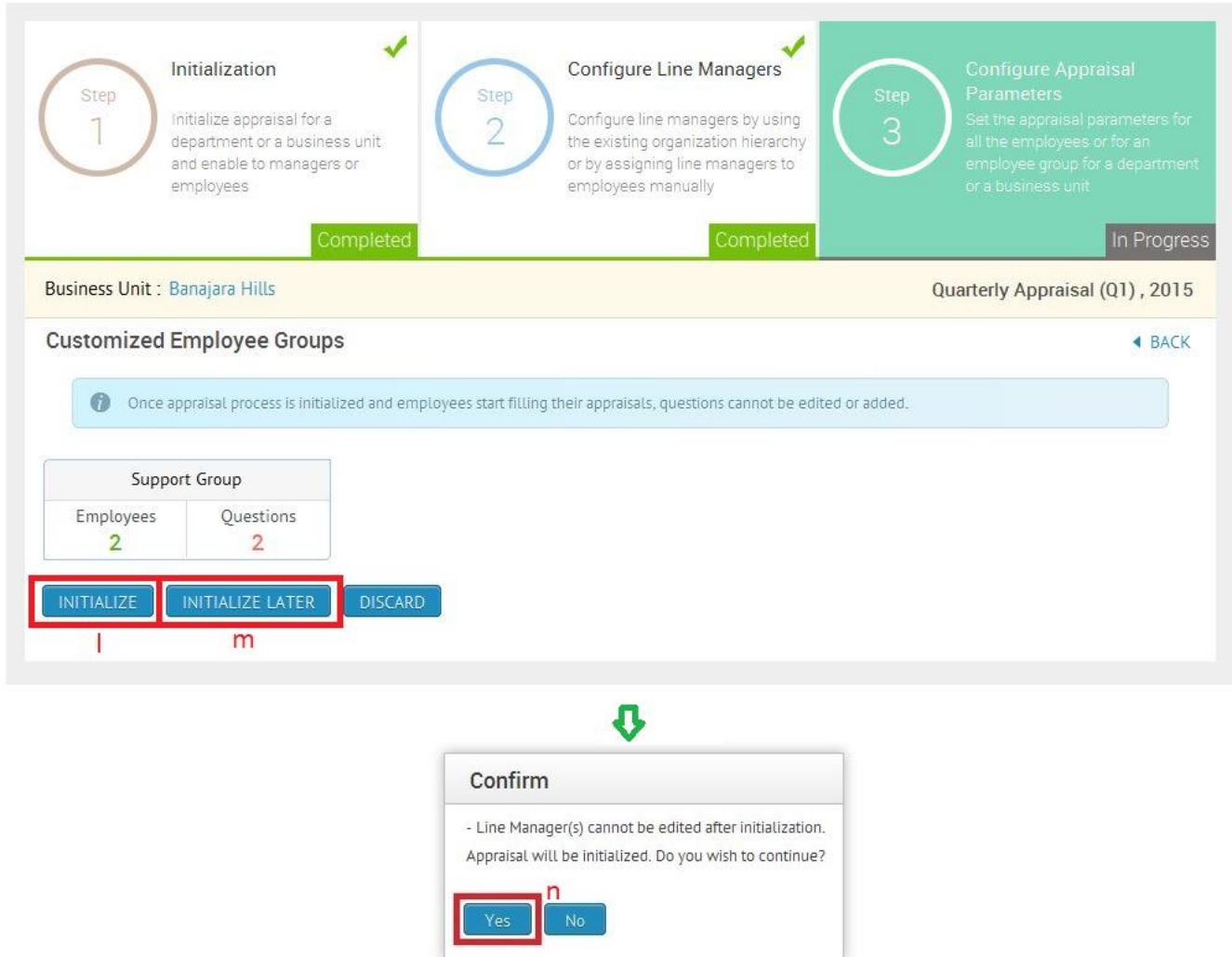


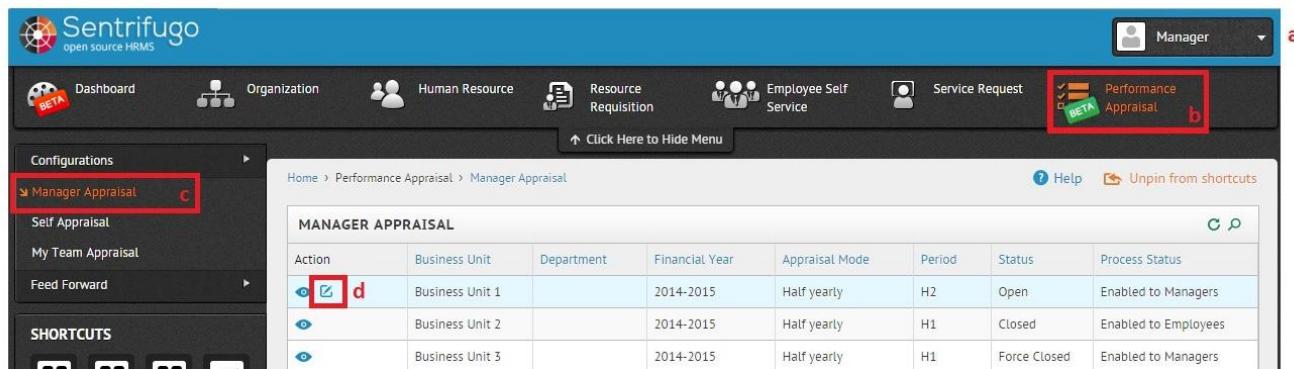
Figure 110

## Manager Appraisal

In the first step of Initialize appraisal, if the appraisal is enabled to managers, managers can configure the appraisal parameters. Once the parameters are set, manager creates employee groups and applies the appraisal parameters to the group. Upon saving the appraisal settings, the HR will be able to change the status of appraisal process from “Enabled to Managers” to “Enabled to Employees”.

- a. Login as a manager
- b. Click on Performance Appraisal in the header
- c. Click on Manager Appraisal in the left side menu
- d. Click on edit icon with respect to an appraisal process

Refer Figure 111



MANAGER APPRAISAL							
Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Status	Process Status
d	Business Unit 1		2014-2015	Half yearly	H2	Open	Enabled to Managers
b	Business Unit 2		2014-2015	Half yearly	H1	Closed	Enabled to Employees
c	Business Unit 3		2014-2015	Half yearly	H1	Force Closed	Enabled to Managers

Figure 111

- e. Create new group (E.g., Support, Testing, Development, etc.)
- f. Add employees to the group by clicking on an employee
- g. Click on Add New Question to add questions for a particular group of employees
- h. Select Questions individually by checking the checkbox respective to each question  
Or
- i. Select all the questions by checking the Check All option in the table header
- j. Select ratings or comments of manager or employee individually for all the questions  
Or
- k. Select ratings or comments of manager or employee by checking the Manager Rating, Manager Comments, Employee Ratings and Employee Comments
- l. Click on Save

Refer Figure 112

### Initialization Details

Business Unit	Jubilee 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

Search Employee

Selected Employees (0)

Search Employee

**Employee 1**  
(EMPP0029)  
Software Engineer

f

**Employee 8**  
(EMPP0029)  
Software Engineer

### Configure Appraisal Parameters for All Employees

All | Selected
+ Add New Question
g

Questions	Answers
<input checked="" type="checkbox"/> Check All <span>i</span>  <input checked="" type="checkbox"/> h	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings  <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings         </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings  <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings         </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings  <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings         </div> <div style="text-align: right; margin-top: 10px;"> <span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px; background-color: #0072bc; color: white; cursor: pointer; margin-right: 10px;">SAVE</span> <span>l Close</span> </div>

Figure 112

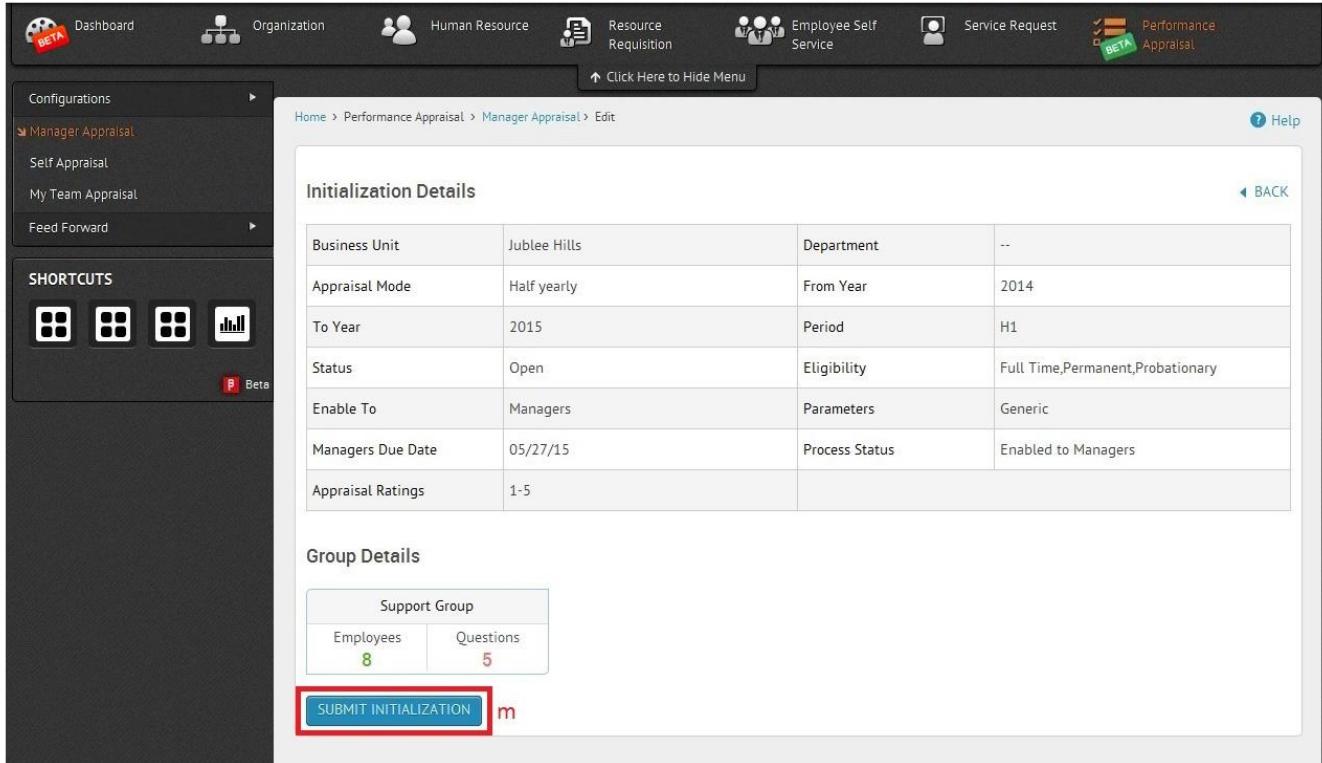
© Sentrifugo 2014 - All Rights Reserved

Page 85 of 98

Upon saving appraisal details, the manager must submit the appraisal process for initialization.

- Click on Submit Initialization

Refer Figure 113



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Organization, Human Resource, Resource Requisition, Employee Self Service, Service Request, and Performance Appraisal (Beta). The left sidebar has sections for Configurations (Manager Appraisal, Self Appraisal, My Team Appraisal), Feed Forward, and SHORTCUTS. The main content area is titled 'Initialization Details' and contains a table with the following data:

Business Unit	Jubilee 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		

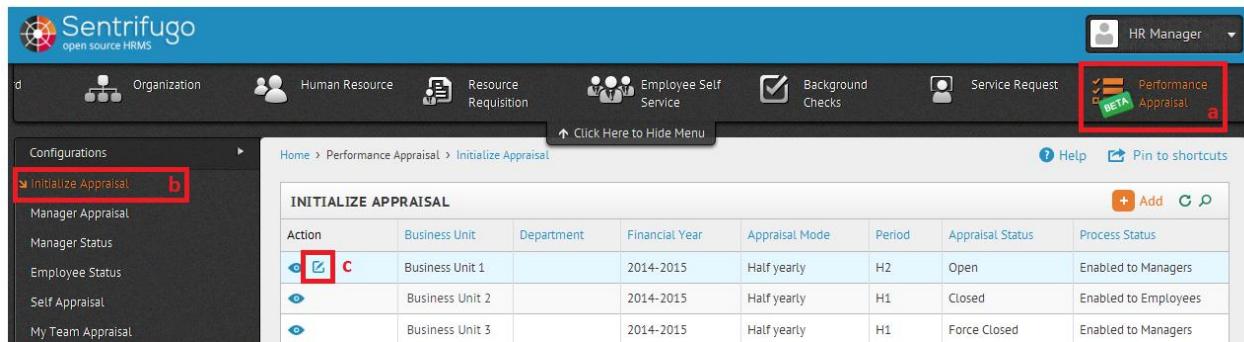
Below this is a 'Group Details' section with a table showing 8 Employees and 5 Questions. At the bottom is a blue 'SUBMIT INITIALIZATION' button, which is highlighted with a red box.

Figure 113

The Hr, then, will update the appraisal process by changing the process status from “Enable to Managers” to “Enable to Employees” and providing Employee Due Date.

- Click on Performance Appraisal in the header
- Click on Initialize Appraisal in the left side menu
- Click on edit icon with respect to an appraisal process

Refer Figure 114



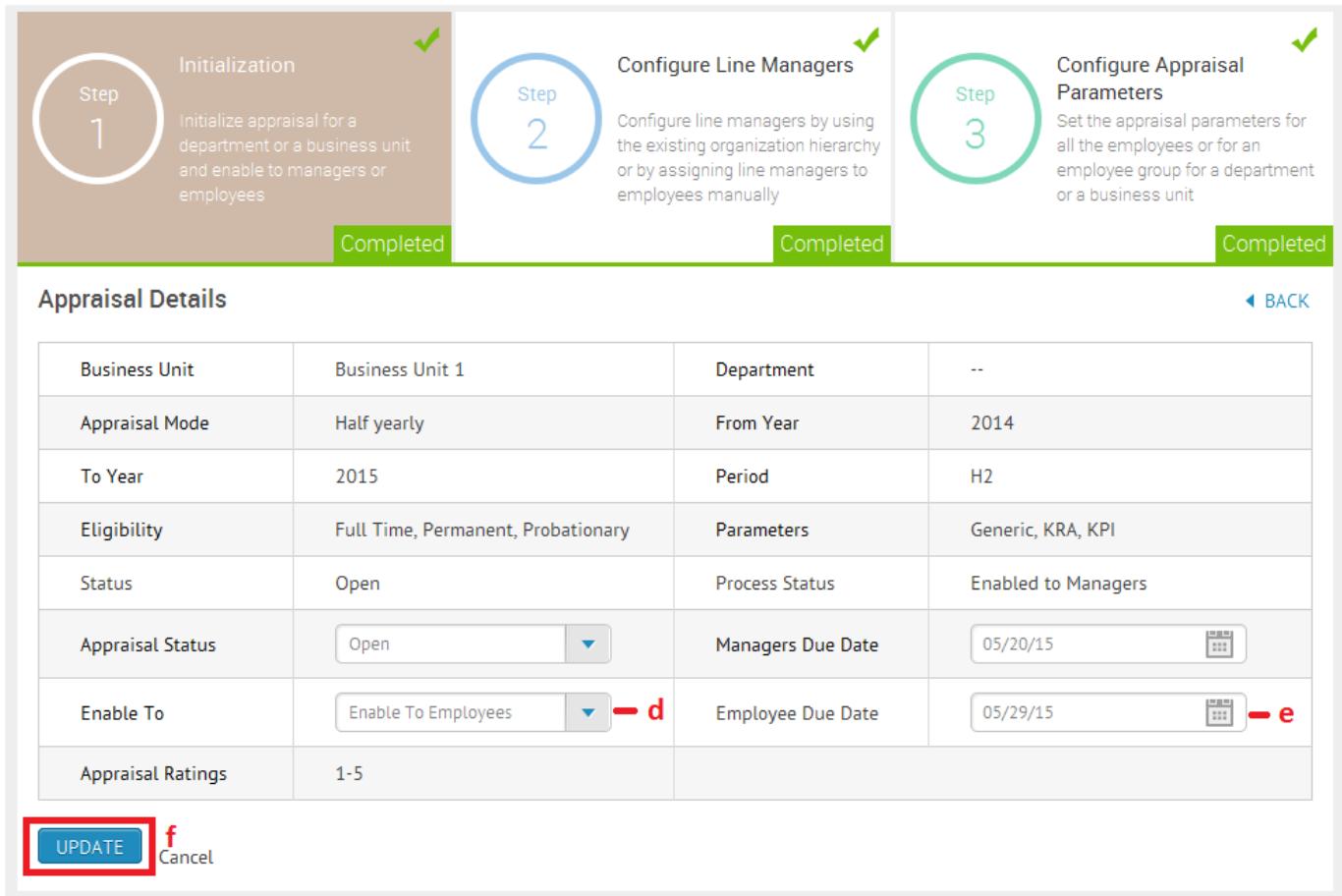
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Organization, Human Resource, Resource Requisition, Employee Self Service, Background Checks, Service Request, and Performance Appraisal (Beta). The left sidebar has sections for Configurations (Initialize Appraisal, Manager Appraisal, Manager Status, Employee Status, Self Appraisal, My Team Appraisal) and Feed Forward. The main content area is titled 'INITIALIZE APPRAISAL' and contains a table with the following data:

Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
<input checked="" type="checkbox"/> C	Business Unit 1		2014-2015	Half yearly	H2	Open	Enabled to Managers
<input checked="" type="checkbox"/>	Business Unit 2		2014-2015	Half yearly	H1	Closed	Enabled to Employees
<input checked="" type="checkbox"/>	Business Unit 3		2014-2015	Half yearly	H1	Force Closed	Enabled to Managers

Figure 114

- d. Select “Enable to Employees” in the Enable To dropdown
- e. Pick a date for Employee Due Date
- f. Click on Update to enable the appraisal process to employees

Refer Figure 115



The figure shows the appraisal setup progress and details. At the top, there are three steps: Step 1 (Initialization) is completed with a green checkmark; Step 2 (Configure Line Managers) is completed with a green checkmark; and Step 3 (Configure Appraisal Parameters) is also completed with a green checkmark. Below the steps is a table titled "Appraisal Details" containing the following information:

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 left, there are two buttons: "UPDATE" (highlighted with a red box and labeled 'f') and "Cancel".

Figure 115

## Manager Status

In this page, the HR views the status of appraisal process when it is enabled to the managers.

- a. Click on Performance Appraisal in the header
- b. Click on Manager Status in the left side menu
- 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

Refer Figure 116

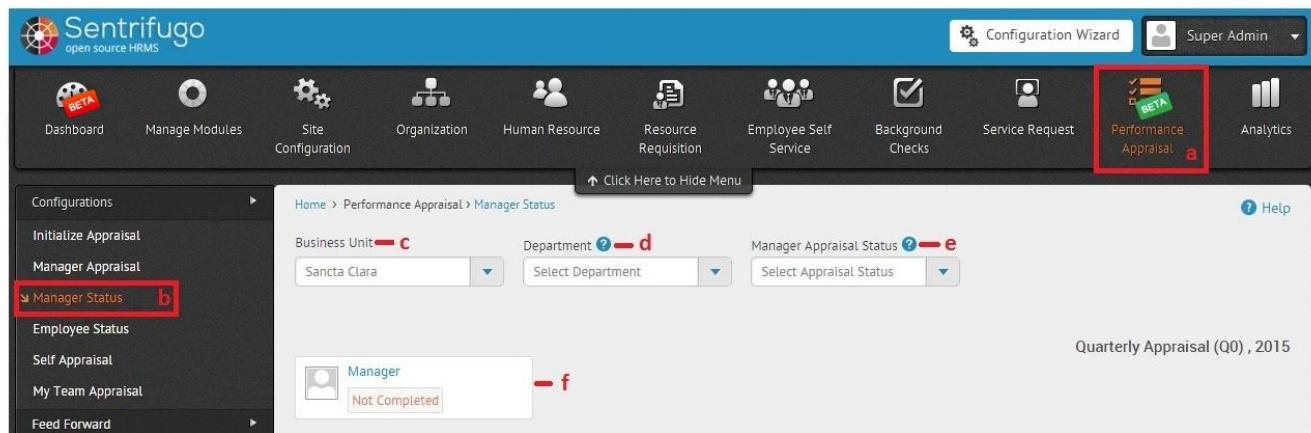


Figure 116

## Employee Status

HR and Management roles will be able to view the employee appraisal status.

- a. Click on Performance Appraisal in the header
- b. Click on Employee Status in the left side menu
- c. Select the Business Unit
- d. Select the Department
- e. Select Appraisal Status if required
- f. Employees and their appraisal status will be displayed

Refer Figure 117

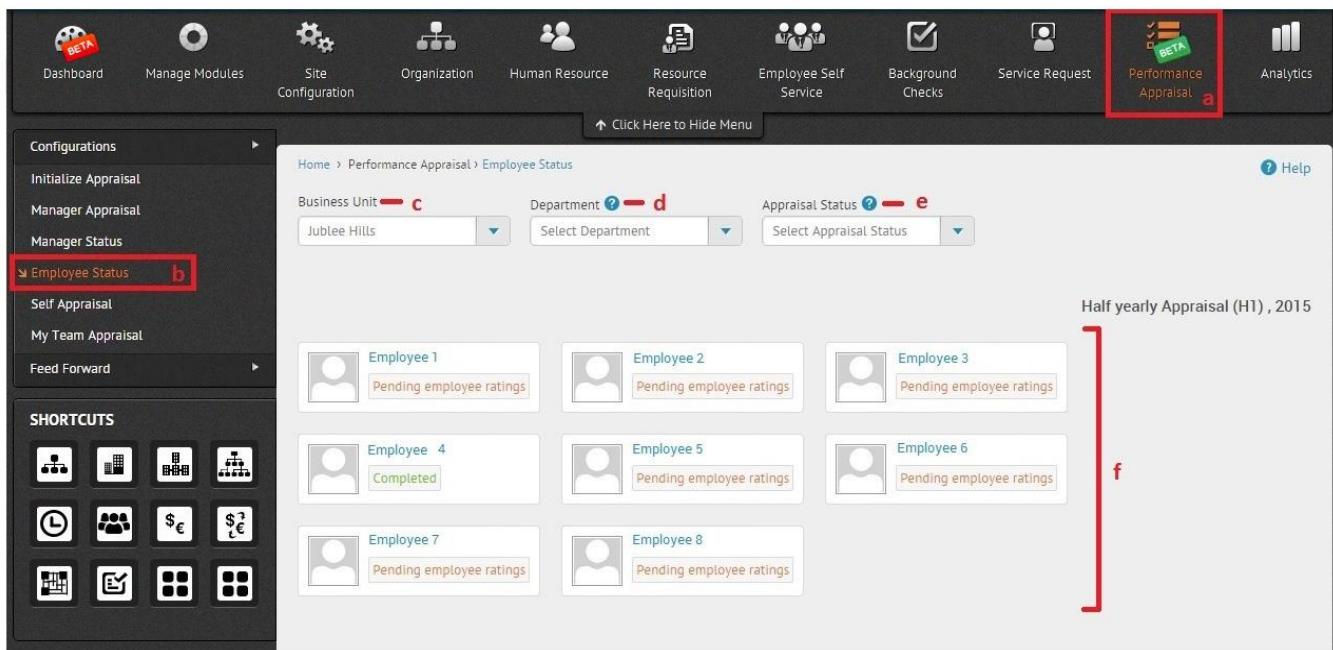


Figure 117

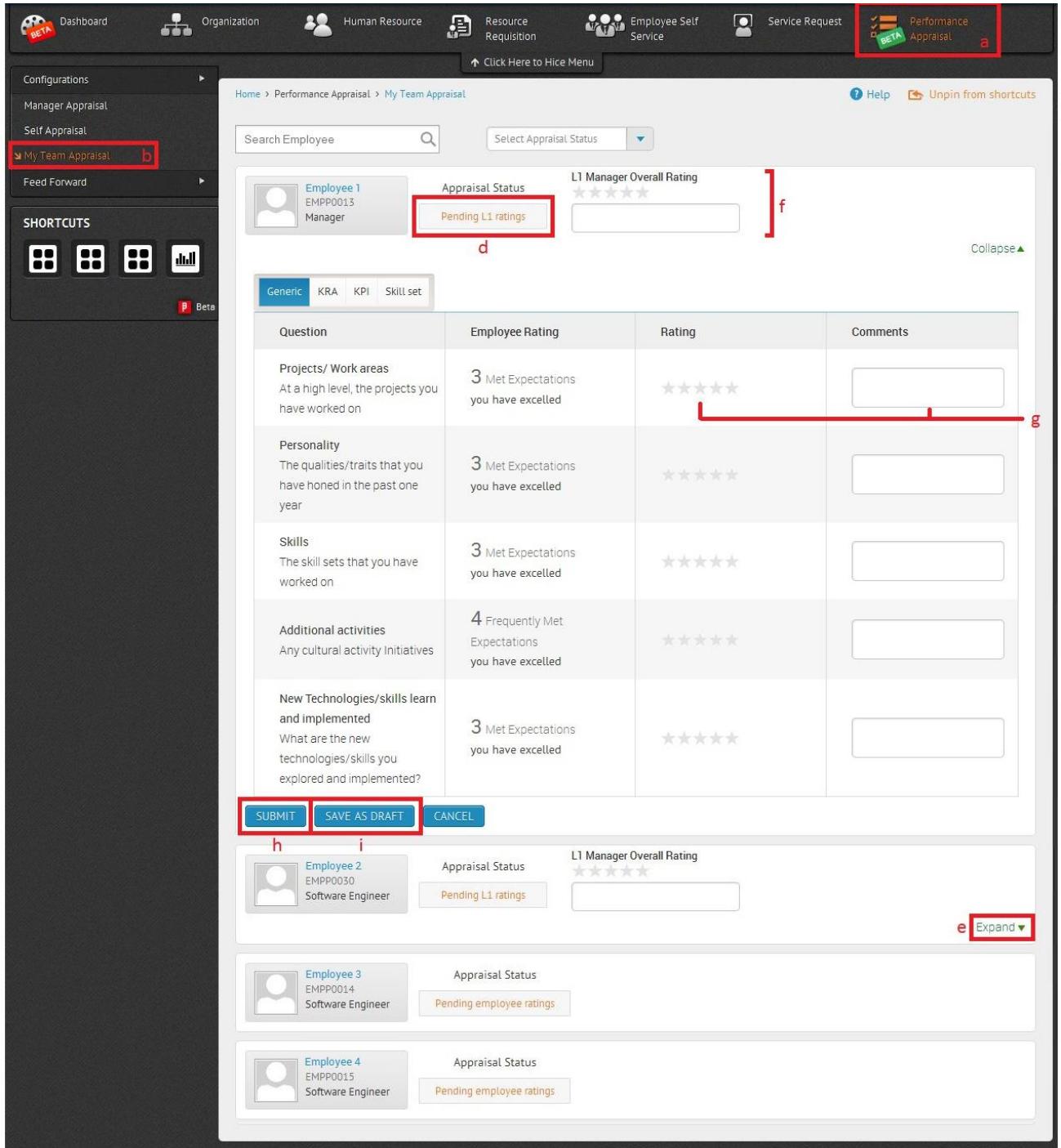
## My Team Appraisal

Managers will be able to view their team employees' appraisal status. Once the employees completes the appraisal process, the managers 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.

- a. Click on Performance Appraisal in the header
- b. Click on My Team Appraisal in the left side menu
- c. All the employees in the manager's team will be displayed
- d. The status of each employee's appraisal is displayed
- e. Click on Expand to provide Manager's rating
- f. Provide overall rating and comment for an employee
- g. Provide the rating and comments respectively

- h. Click on Submit to send it for approval based on the levels of appraisal
- i. Click on Save as draft to save the ratings and comments

Refer Figure 118



The screenshot shows the Sentrifugo Performance Appraisal module. The top navigation bar includes tabs for Dashboard, Organization, Human Resource, Resource Requisition, Employee Self Service, Service Request, and Performance Appraisal (which is highlighted with a red box). A sidebar on the left contains links for Configurations, Manager Appraisal, Self Appraisal (with 'My Team Appraisal' selected), Feed Forward, and SHORTCUTS. The main content area displays 'My Team Appraisal' for Employee 1 (EMPP0013, Manager). It shows an appraisal status of 'Pending L1 ratings' and an L1 Manager Overall Rating of 3 stars. Below this is a table with five rows of questions and their responses:

Question	Employee Rating	Rating	Comments
Projects/ Work areas At a high level, the projects you have worked on	3 Met Expectations you have excelled	★★★★★	
Personality The qualities/traits that you have honed in the past one year	3 Met Expectations you have excelled	★★★★★	
Skills The skill sets that you have worked on	3 Met Expectations you have excelled	★★★★★	
Additional activities Any cultural activity Initiatives	4 Frequently Met Expectations you have excelled	★★★★★	
New Technologies/skills learn and implemented What are the new technologies/skills you explored and implemented?	3 Met Expectations you have excelled	★★★★★	

At the bottom, there are buttons for SUBMIT, SAVE AS DRAFT, and CANCEL. Below the main section, there are profiles for Employee 2, Employee 3, and Employee 4, each with an 'Expand' button (highlighted with a red box) to view more details.

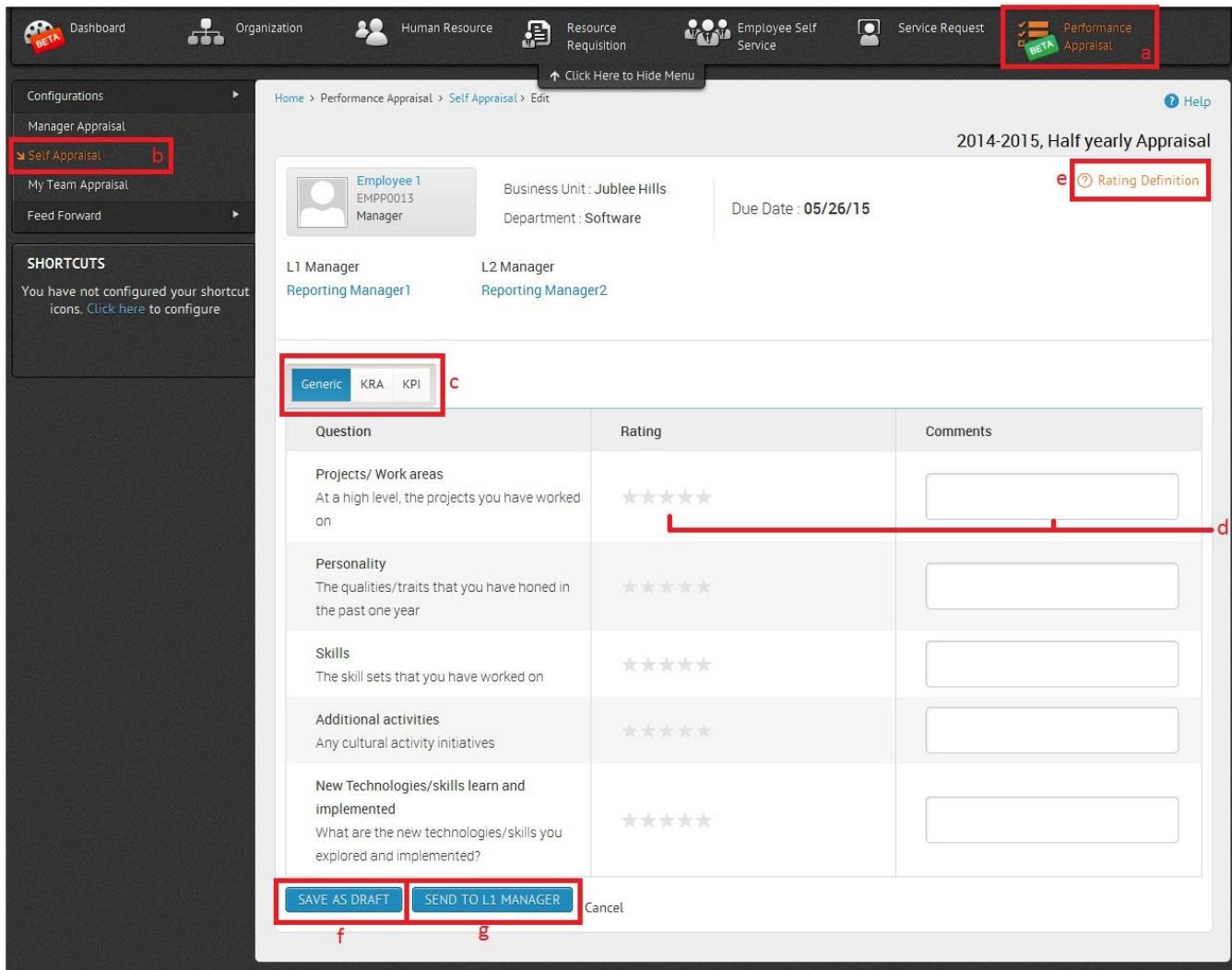
Figure 118

## Self Appraisal

Self-appraisal is displayed to all the employees as each and every employee is subject to appraisal process. Here, the employees will provide self-appraisal details such as ratings and comments. Upon completion of self-appraisal, their appraisal will be visible to their line managers for further ratings and comments

- a. Click on Performance Appraisal in the header
- b. Click on Self Appraisal in the left side menu
- c. The parameters are displayed above the questions grid
- d. Provide rating and comments for every question
- e. Click on Rating definition to know more about ratings
- f. Click on Send to L1 Manager to send it to manager
- g. Click on Save as Draft to only save the appraisal process

Refer Figure 119



The screenshot shows the Sentrifugo HRMS application interface for a self-appraisal session. The top navigation bar includes links for Dashboard, Organization, Human Resource, Resource Requisition, Employee Self Service, Service Request, and Performance Appraisal (which is highlighted with a red box). A sidebar on the left lists 'Configurations', 'Manager Appraisal' (with 'Self Appraisal' selected, indicated by a red box labeled 'b'), 'My Team Appraisal', and 'Feed Forward'. Below the sidebar is a 'SHORTCUTS' section with a note about未配置的快捷键图标. The main content area displays the '2014-2015, Half yearly Appraisal' for 'Employee 1' (EMPP0013, Manager). It shows business unit (Jubilee Hills), department (Software), and due date (05/26/15). Under 'L1 Manager' and 'L2 Manager', 'Reporting Manager1' and 'Reporting Manager2' are listed. The central part of the screen contains a table for rating questions. The first question is 'Projects/ Work areas' with the rating '★★★★★'. The second question is 'Personality' with the rating '★★★★★'. The third question is 'Skills' with the rating '★★★★★'. The fourth question is 'Additional activities' with the rating '★★★★★'. The fifth question is 'New Technologies/skills learn and implemented' with the rating '★★★★★'. At the bottom of the table are three buttons: 'SAVE AS DRAFT' (red box 'f'), 'SEND TO L1 MANAGER' (red box 'g'), and 'Cancel'.

Figure 119

## Feed Forward

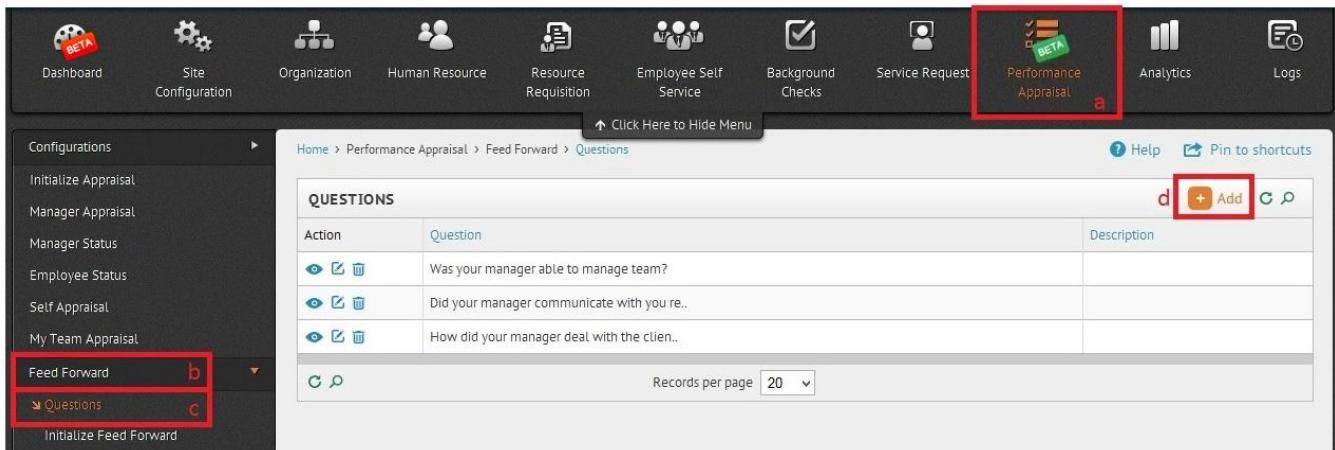
Feed Forward is the feedback given by the employees to appraise their respective line managers. All the configurations are done on management level. Once all the employees have appraised their managers, managers' appraisal process will be carried out by the management.

## Questions

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

- Click on Performance Appraisal in the header
- Click on Feed Forward in the left side menu
- Click on Question in the submenu links
- Click on Add in the right side grid

Refer Figure 120

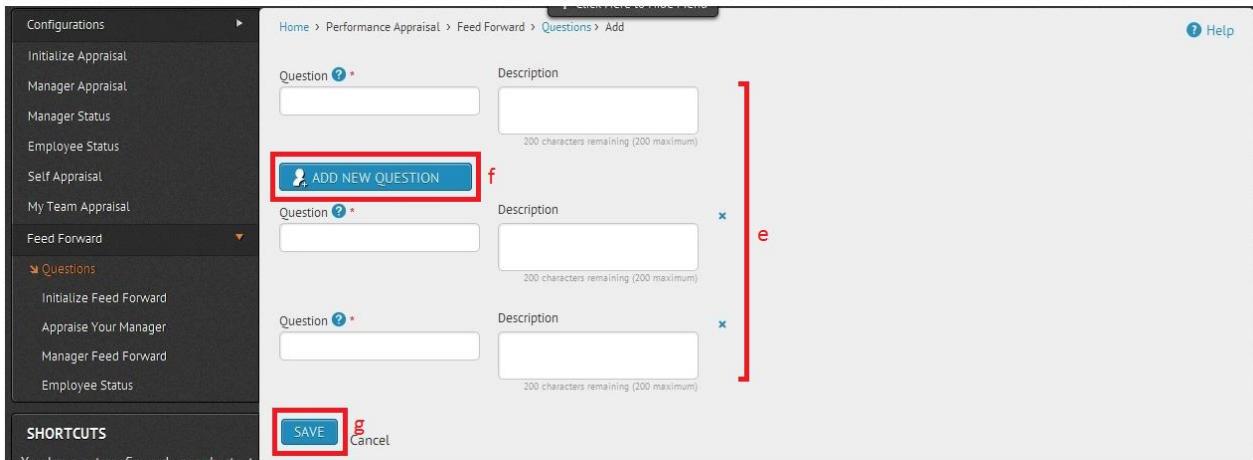


The screenshot shows the Sentrifugo HRMS interface. At the top, there is a navigation bar with various icons and links: Dashboard, Site Configuration, Organization, Human Resource, Resource Requisition, Employee Self Service, Background Checks, Service Request, **Performance Appraisal** (highlighted with a red box and labeled 'a'), Analytics, and Logs. Below the navigation bar is a sub-navigation menu titled 'Configurations'. It includes links like Initialize Appraisal, Manager Appraisal, Manager Status, Employee Status, Self Appraisal, My Team Appraisal, Feed Forward (highlighted with a red box and labeled 'b'), and Questions (highlighted with a red box and labeled 'c'). The main content area is titled 'QUESTIONS' and displays a table with three rows of questions. The first row is 'Was your manager able to manage team?'. The second row is 'Did your manager communicate with you re...'. The third row is 'How did your manager deal with the clien...'. There are columns for Action, Question, and Description. A 'Help' and 'Pin to shortcuts' link are at the top right. A 'Records per page' dropdown is at the bottom right. A red box labeled 'd' highlights the 'Add' button in the top right corner of the table. A red box labeled 'e' highlights the 'Add New Question' button in the middle of the page. A red box labeled 'f' highlights the 'Question' input field in the first row of the table. A red box labeled 'g' highlights the 'SAVE' button at the bottom left.

Figure 120

- Add the question and description if required
- Click on Add New Question to add more questions
- Click on Save

Refer Figure 121



The screenshot shows the 'Add New Question' form. On the left, there is a sidebar with the same 'Configurations' menu as Figure 120, with 'Feed Forward' and 'Questions' highlighted. The main form has two sections. The first section is for the first question, with 'Question' and 'Description' fields. The second section is for the second question, also with 'Question' and 'Description' fields. A vertical red bracket labeled 'e' spans both sections. A red box labeled 'f' highlights the 'ADD NEW QUESTION' button in the first section. A red box labeled 'g' highlights the 'SAVE' button at the bottom left of the form.

Figure 121

## Initialize feed forward

In the initialize feed forward page, only the appraisal that have “Closed” status are displayed.

Appraisal: Select the appraisal from the populated dropdown. The appraisal details grid is displayed in the screen where Business Unit, Department, Appraisal Mode, From Year, To Year and Period are displayed.

Status: Feed Forward status will be "Open" by default. Upon the initialization of feed forward, close and force close options will be made available

- Force Close: Closes the Appraisal Process by force. Appraisal Process for the selected Business Unit can be configured again and for the same appraisal period
- Close: Closes the appraisal process for the selected business unit permanently

Employee Details: Here, the Management will determine if the management can view only the feedback given by the employee or the feedback along with the employee names.

Show: Employee names and their feedbacks will be displayed

Hide: Only the feedbacks 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

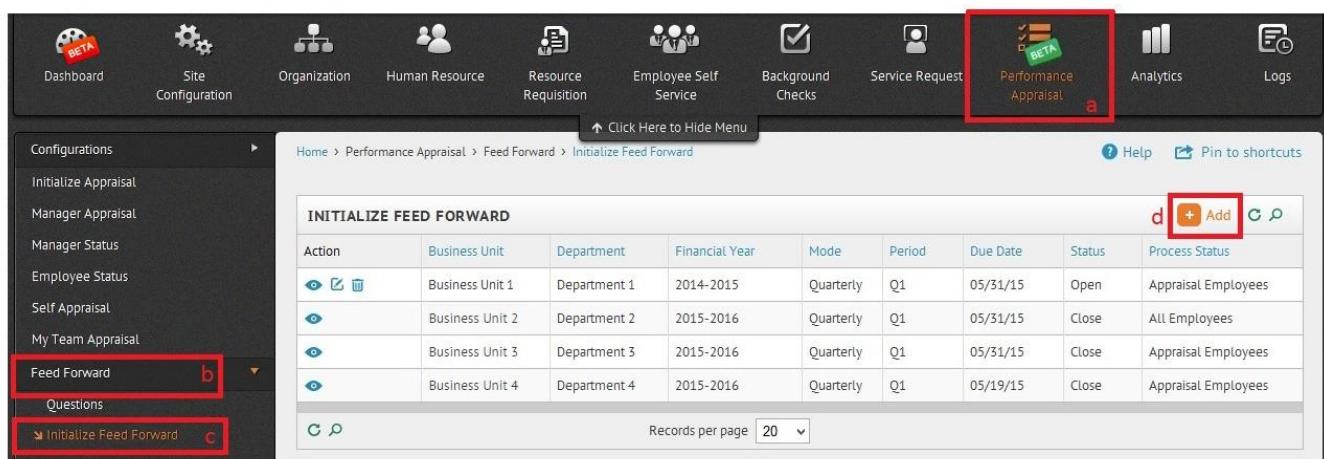
All Employees: All the employees in the organization can appraise their managers

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 link is also provided.

- a. Click on Performance Appraisal in the header
- b. Click on Feed Forward in the left side menu
- c. Click on Initialize Feed Forward in the submenu links
- d. Click on Add in the right side grid

Refer Figure 122

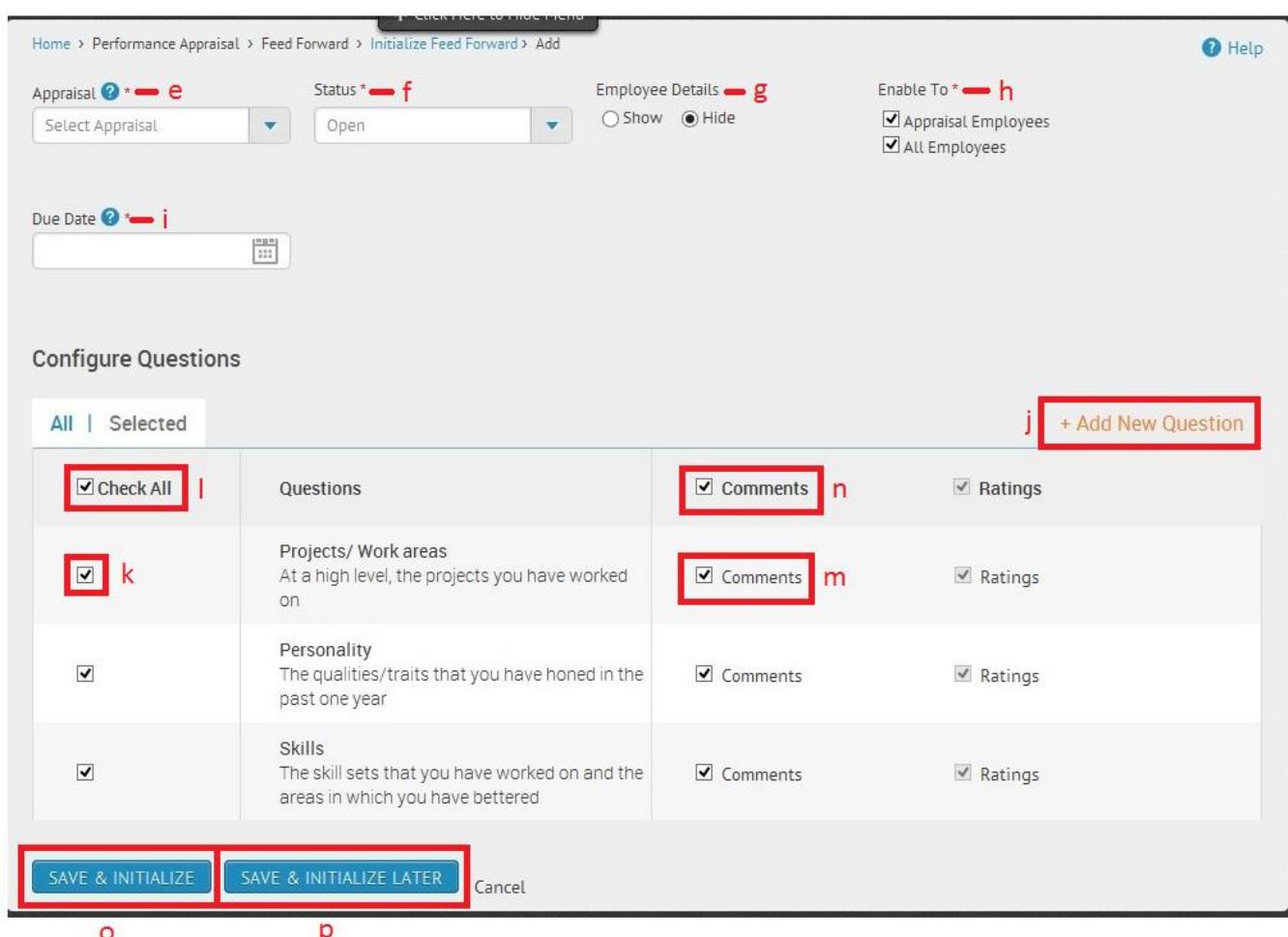


Action	Business Unit	Department	Financial Year	Mode	Period	Due Date	Status	Process Status
	Business Unit 1	Department 1	2014-2015	Quarterly	Q1	05/31/15	Open	Appraisal Employees
	Business Unit 2	Department 2	2015-2016	Quarterly	Q1	05/31/15	Close	All Employees
	Business Unit 3	Department 3	2015-2016	Quarterly	Q1	05/31/15	Close	Appraisal Employees
	Business Unit 4	Department 4	2015-2016	Quarterly	Q1	05/19/15	Close	Appraisal Employees

Figure 122

- e. Select an appraisal process from the Appraisal dropdown
- f. The Status will be by default selected as Open
- g. Define whether or not you want to view the employee details along with their feedback ratings and comments
- h. Enable Feed Forward to all employees or only to employees who are eligible for Appraisal process
- i. Pick a date for employees to provide their feedback
- j. Click on Add New Question to add questions for Feed Forward
- k. Select Questions individually by checking the checkbox respective to each question  
Or
- l. Select all the questions by checking the Check All option in the table header
- m. Select comments individually for all the questions  
Or
- n. Select comments by checking the Comments checkbox in the table header
- o. Click on Save & Initialize to initialize the Feed Forward process
- p. Click on Save & Initialize Later to only save the Feed Forward process

Refer Figure 123



The screenshot shows the 'Initialize Feed Forward' configuration page. At the top, there are fields for 'Appraisal' (dropdown), 'Status' (dropdown set to 'Open'), 'Employee Details' (radio buttons for 'Show' and 'Hide'), and 'Enable To' (checkboxes for 'Appraisal Employees' and 'All Employees'). Below this is a 'Due Date' field with a calendar icon.

**Configure Questions**

All	Selected	+ Add New Question		
<input checked="" type="checkbox"/> Check All	Questions	<input checked="" type="checkbox"/> Comments	<input checked="" type="checkbox"/> Ratings	
<input checked="" type="checkbox"/> k	Projects/ Work areas At a high level, the projects you have worked on	<input checked="" type="checkbox"/> Comments	<input checked="" type="checkbox"/> Ratings	
<input checked="" type="checkbox"/>	Personality The qualities/traits that you have honed in the past one year	<input checked="" type="checkbox"/> Comments	<input checked="" type="checkbox"/> Ratings	
<input checked="" type="checkbox"/>	Skills The skill sets that you have worked on and the areas in which you have bettered	<input checked="" type="checkbox"/> Comments	<input checked="" type="checkbox"/> Ratings	

At the bottom, there are three buttons: 'SAVE & INITIALIZE' (highlighted with a red box), 'SAVE & INITIALIZE LATER' (highlighted with a red box), and 'Cancel'.

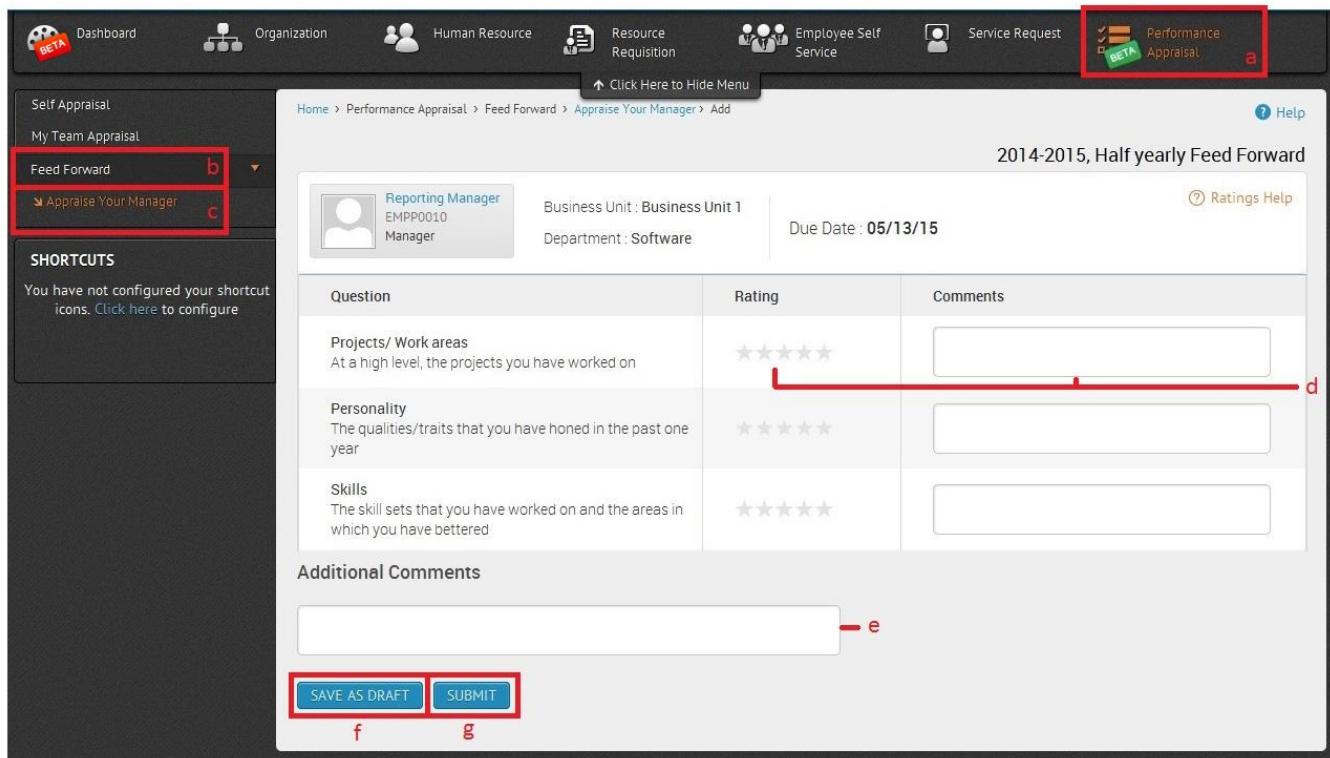
Figure 123

## Appraise Your Managers

The employees will be able to view the questions established to appraise their line managers. They can provide ratings and comments for each question and the manager feed forward is submitted.

- a. Click on Performance Appraisal in the header
- b. Click on Feed Forward in the left side menu
- c. Click on Appraise Your Manager in the submenu links
- d. Provide ratings and comments
- e. Enter additional comments (not mandatory)
- f. Click on Save as Draft to save Feed Forward
- g. Click on Submit to submit Feed Forward

Refer Figure 124



Dashboard    Organization    Human Resource    Resource Requisition    Employee Self Service    Service Request    Performance Appraisal BETA

Click Here to Hide Menu

Self Appraisal    My Team Appraisal

Feed Forward b

Appraise Your Manager c

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

Reporting Manager  
EMPP0010  
Manager

Business Unit : Business Unit 1  
Department : Software    Due Date : 05/13/15

2014-2015, Half yearly Feed Forward    [? Ratings Help](#)

Question	Rating	Comments
Projects/ Work areas At a high level, the projects you have worked on	★★★★★	<span>d</span>
Personality The qualities/traits that you have honed in the past one year	★★★★★	
Skills The skill sets that you have worked on and the areas in which you have bettered	★★★★★	

Additional Comments e

SAVE AS DRAFT f    SUBMIT g

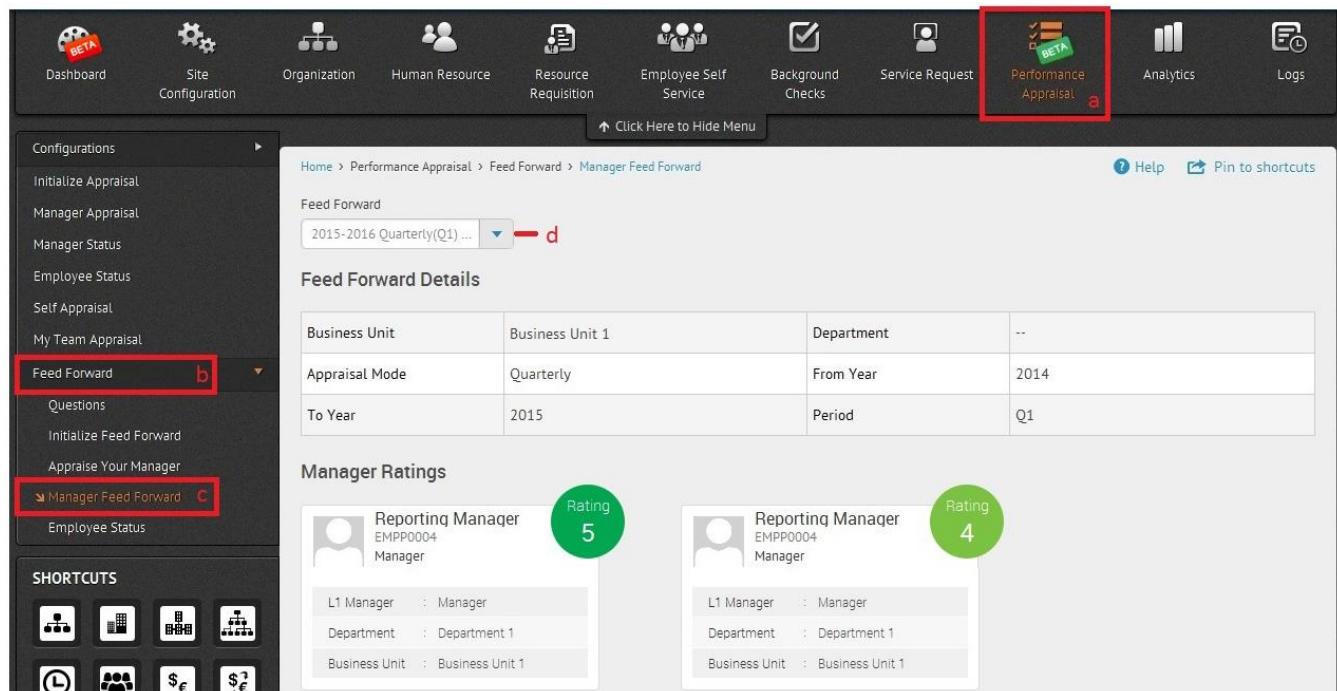
Figure 124

## Manager Feed Forward

Only the Management will be able to view managers feed forward. Upon selection of appraisal from the dropdown, feed forward details along with the manager ratings are displayed. The average ratings of all the employee will be highlighted. A detailed description of comments and ratings of employees are displayed by question or by employee.

- a. Click on Performance Appraisal in the header
- b. Click on Feed Forward in the left side menu
- c. Click on Appraise Your Manager in the submenu links
- d. Select a process to Feed Forward details in the dropdown

Refer Figure 125



The screenshot shows the Sentrifugo HRMS application interface. The top navigation bar includes icons for Dashboard, Site Configuration, Organization, Human Resource, Resource Requisition, Employee Self Service, Background Checks, Service Request, **Performance Appraisal** (highlighted with a red box), Analytics, and Logs. A dropdown menu on the left is open, showing options like Configurations, Initialize Appraisal, Manager Appraisal, Manager Status, Employee Status, Self Appraisal, My Team Appraisal, **Feed Forward** (highlighted with a red box and labeled 'b'), Questions, Initialize Feed Forward, Appraise Your Manager, Manager Feed Forward (highlighted with a red box and labeled 'c'), and Employee Status. Below the dropdown, there's a section for SHORTCUTS with icons for organization, people, money, and more. The main content area displays 'Feed Forward Details' for '2015-2016 Quarterly(Q1)' (highlighted with a red box and labeled 'd'). It shows a table with four rows: Business Unit (Business Unit 1), Department (--), Appraisal Mode (Quarterly), From Year (2014), To Year (2015), Period (Q1). Below this is a 'Manager Ratings' section. It lists two managers with their ratings: 'Reporting Manager' (EMP0004, Manager) has a rating of **5**, and another 'Reporting Manager' (EMP0004, Manager) has a rating of **4**. Both entries show L1 Manager, Department, and Business Unit details.

Business Unit	Business Unit 1	Department	--
Appraisal Mode	Quarterly	From Year	2014
To Year	2015	Period	Q1

Manager Ratings	
 Reporting Manager EMP0004 Manager	Rating <b>5</b>
 Reporting Manager EMP0004 Manager	Rating <b>4</b>
L1 Manager : Manager	
Department : Department 1	
Business Unit : Business Unit 1	

Figure 125

- e. Click on individual manager section to view the ratings and comments provided by employees
- 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

Refer Figure 126

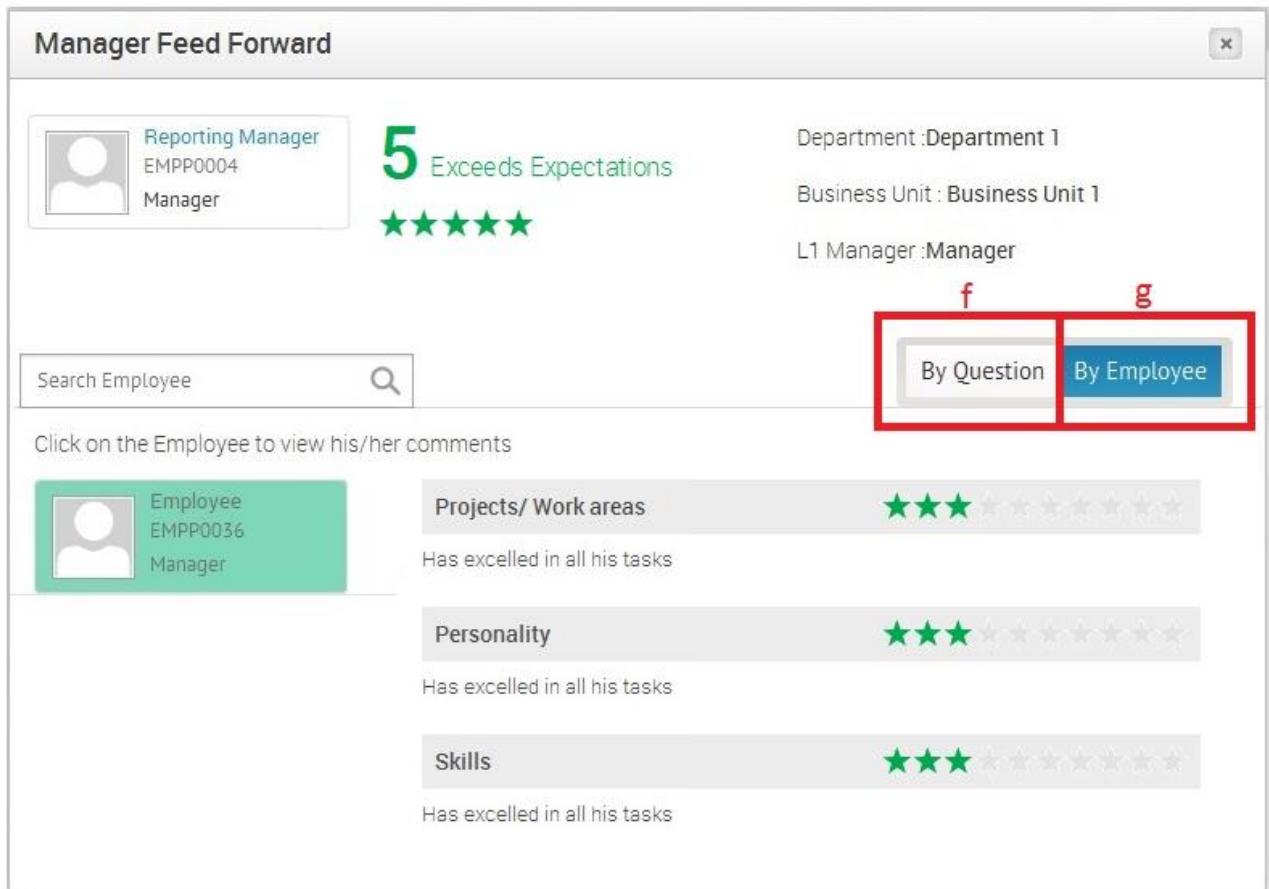


Figure 126

## Employee Status

Management will be able to view the feed forward status of all the employees.

- a. Click on Performance Appraisal in the header
- b. Click on Feed Forward in the left side menu
- c. Click on Employee Status in the submenu links
- d. Select a process to Feed Forward details in the dropdown
- e. The employees of the selected process along with their Feed Forward status will be displayed

Refer Figure 127

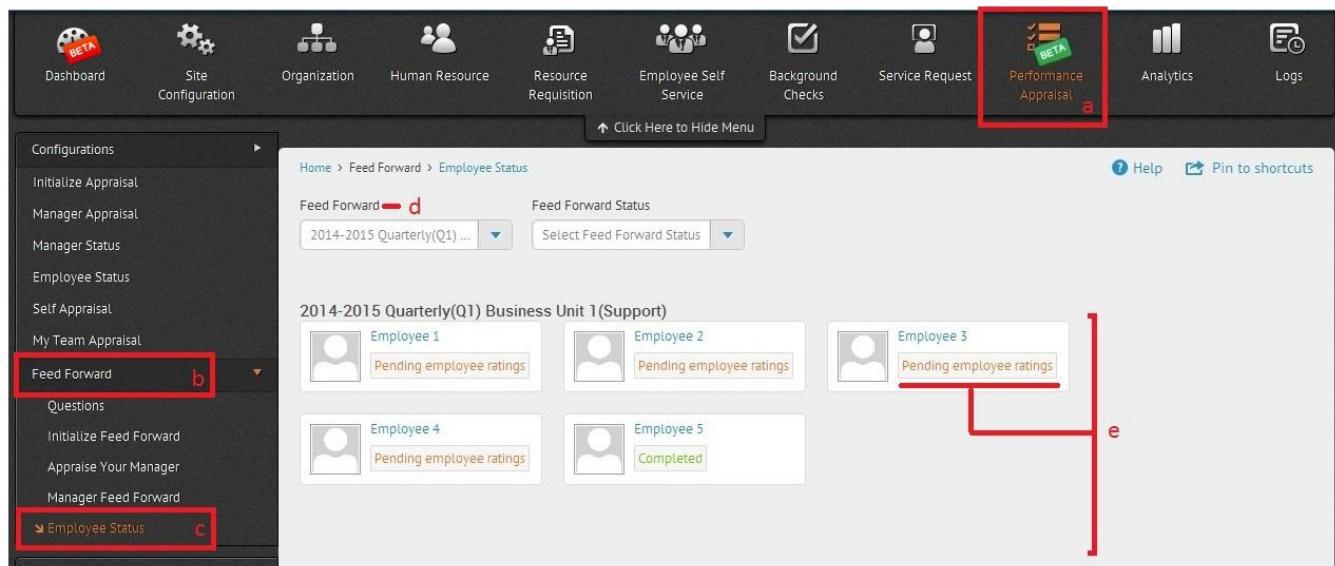


Figure 127