Sentrifugo
User Guide

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Getting Started

How to Set Site Configurations:

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

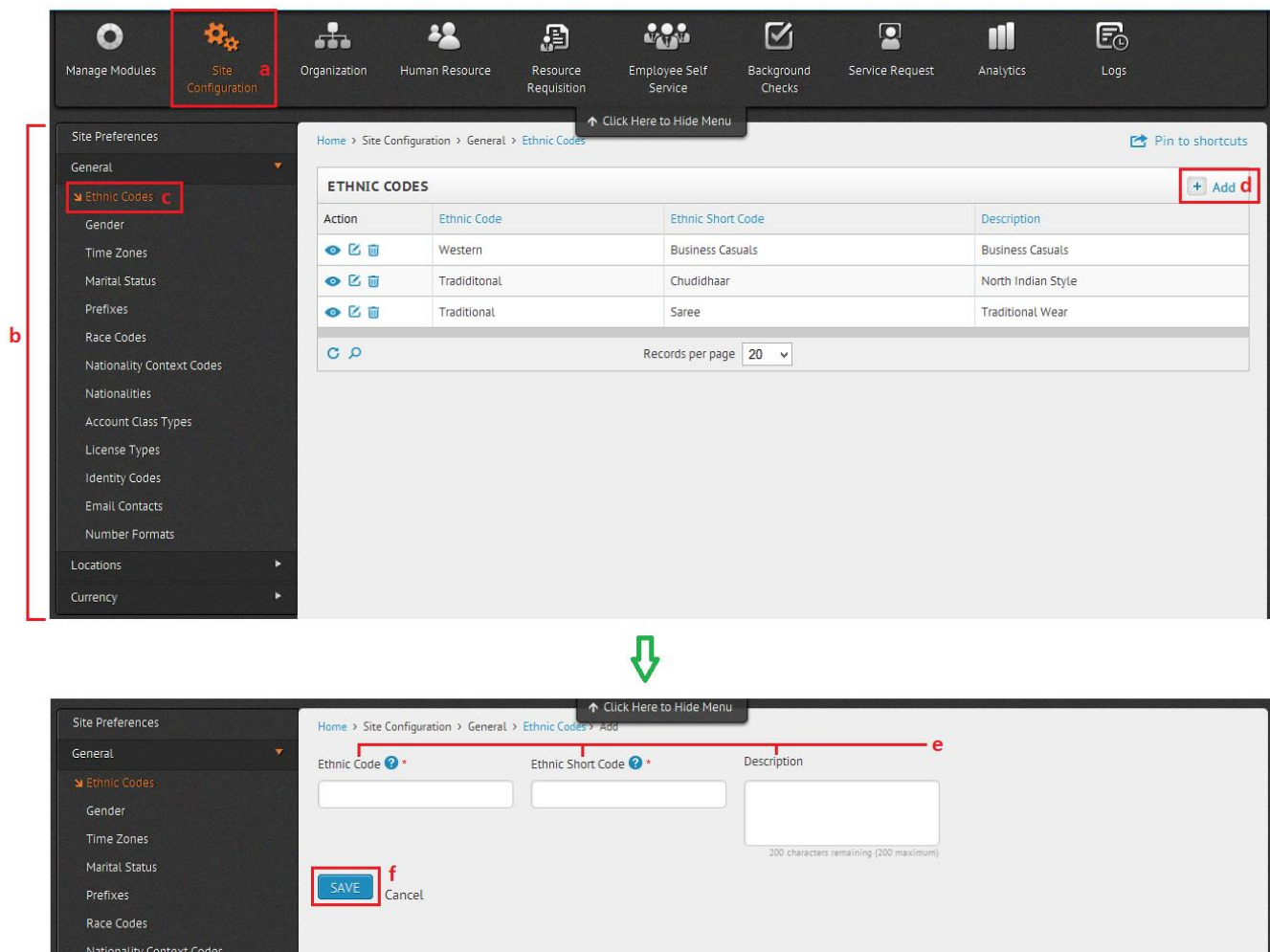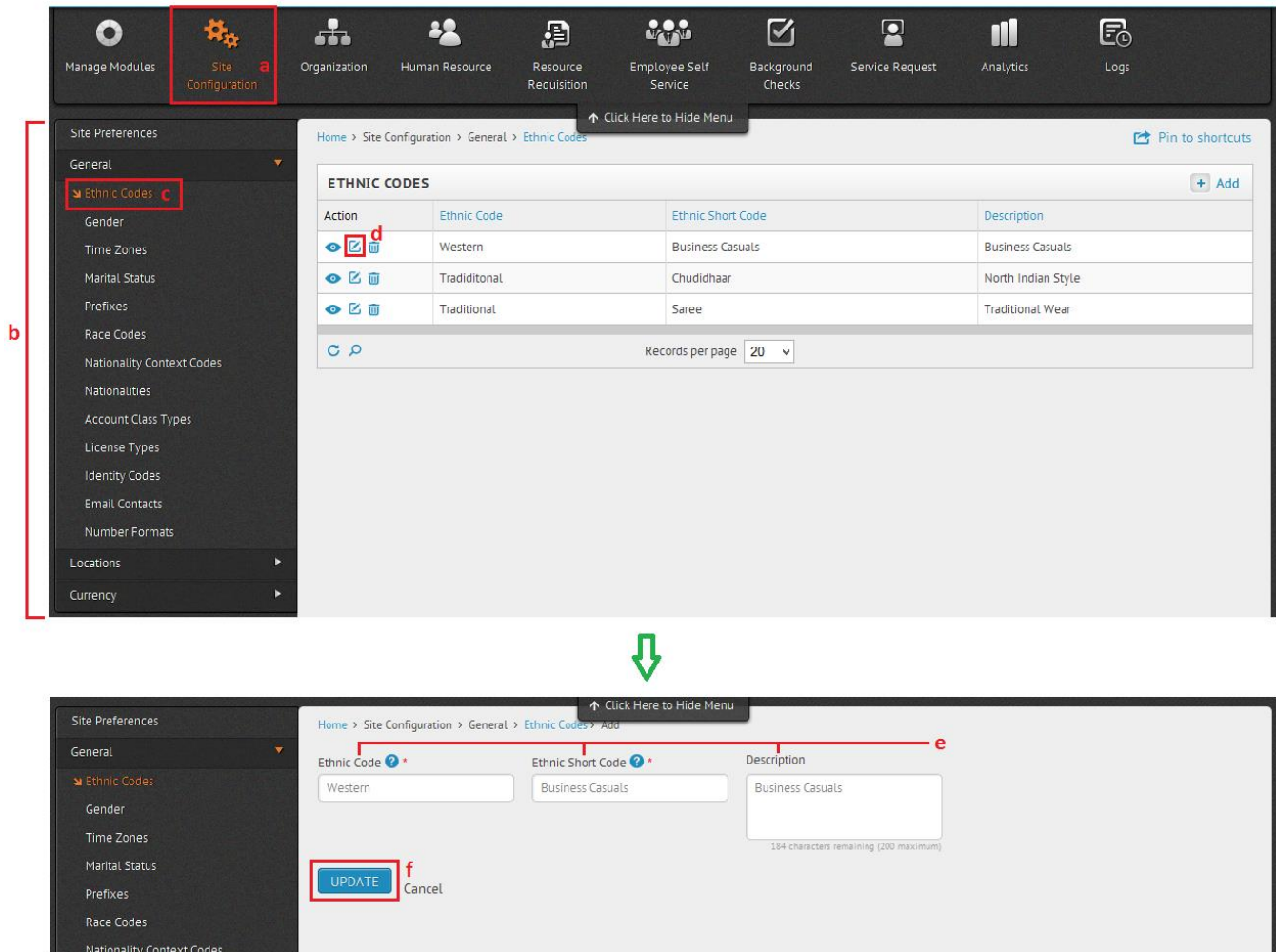For further understanding, refer Figure 1, which explains about adding Ethnic Codes

Figure 1

How to Edit Site Configurations:

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 2, which explains about editing Ethnic Codes

Figure 2

Need to Delete Site Configurations:

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

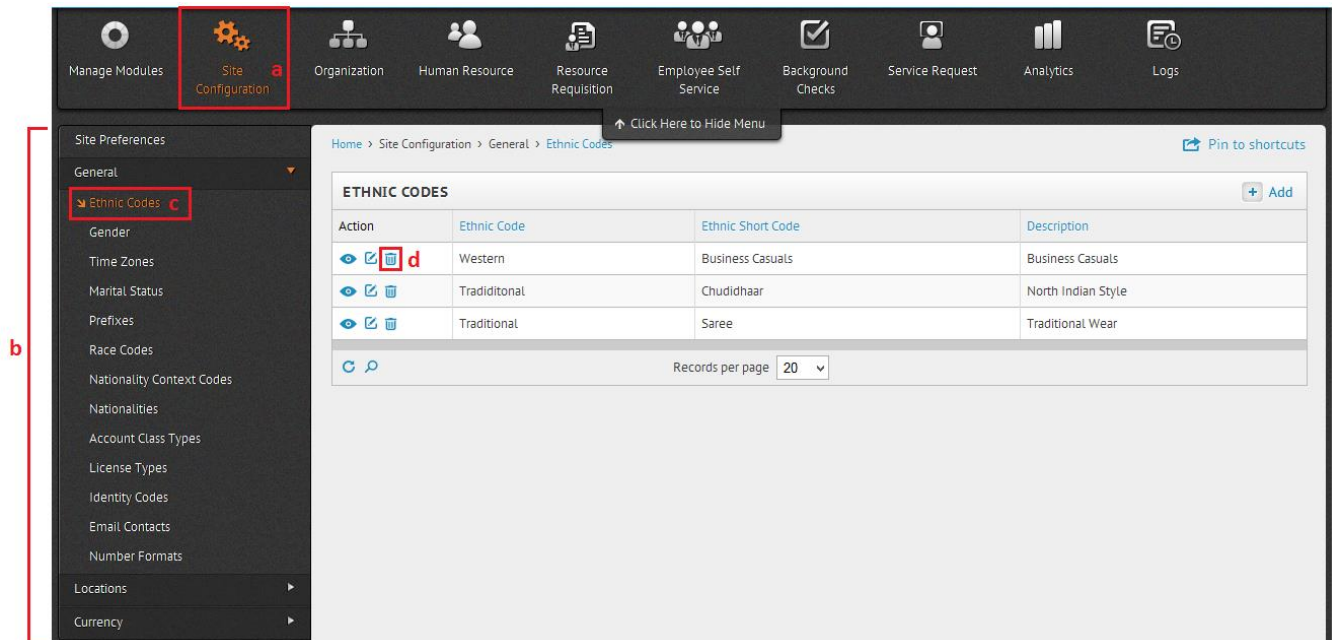For further understanding, refer Figure 3, which explains about deleting Ethnic Codes

Figure 3

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

Refer Figure 4

Figure 4

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 5, which explains about adding Pay Frequency
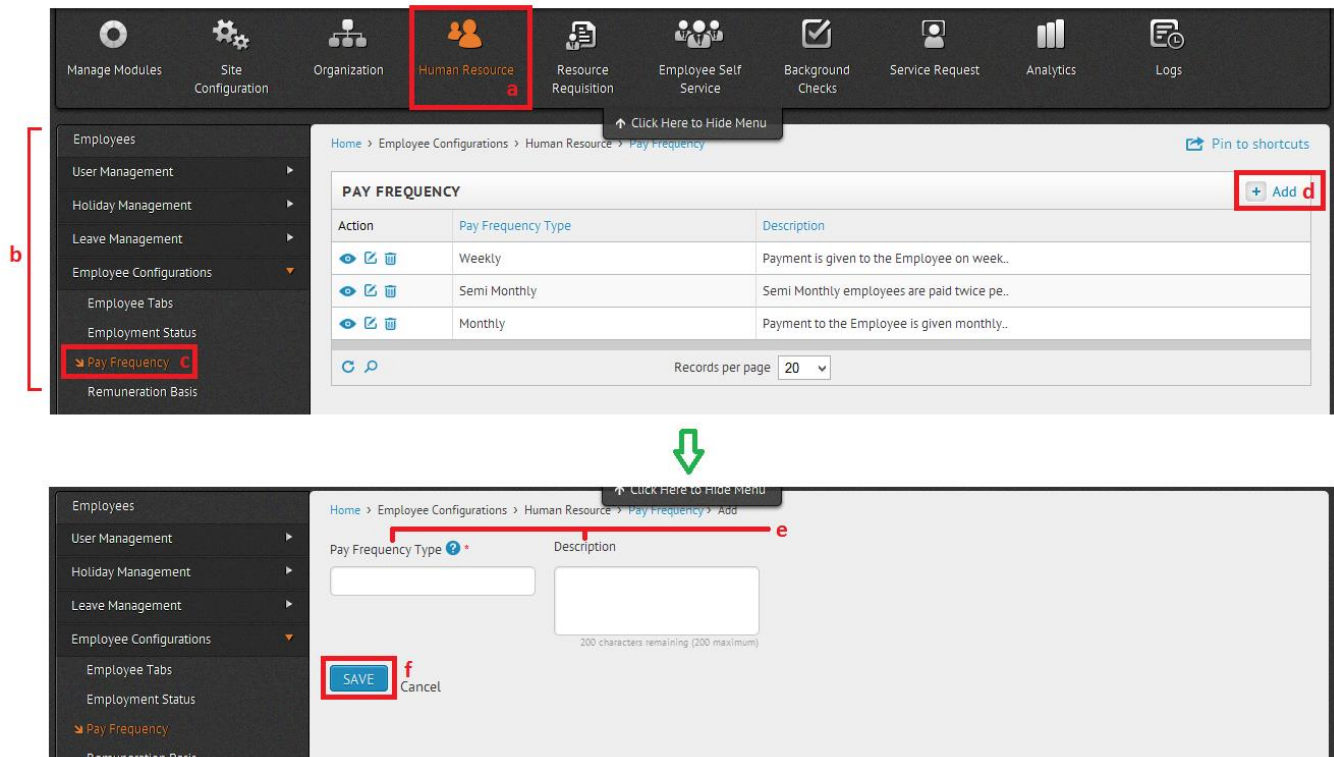

Figure 5

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

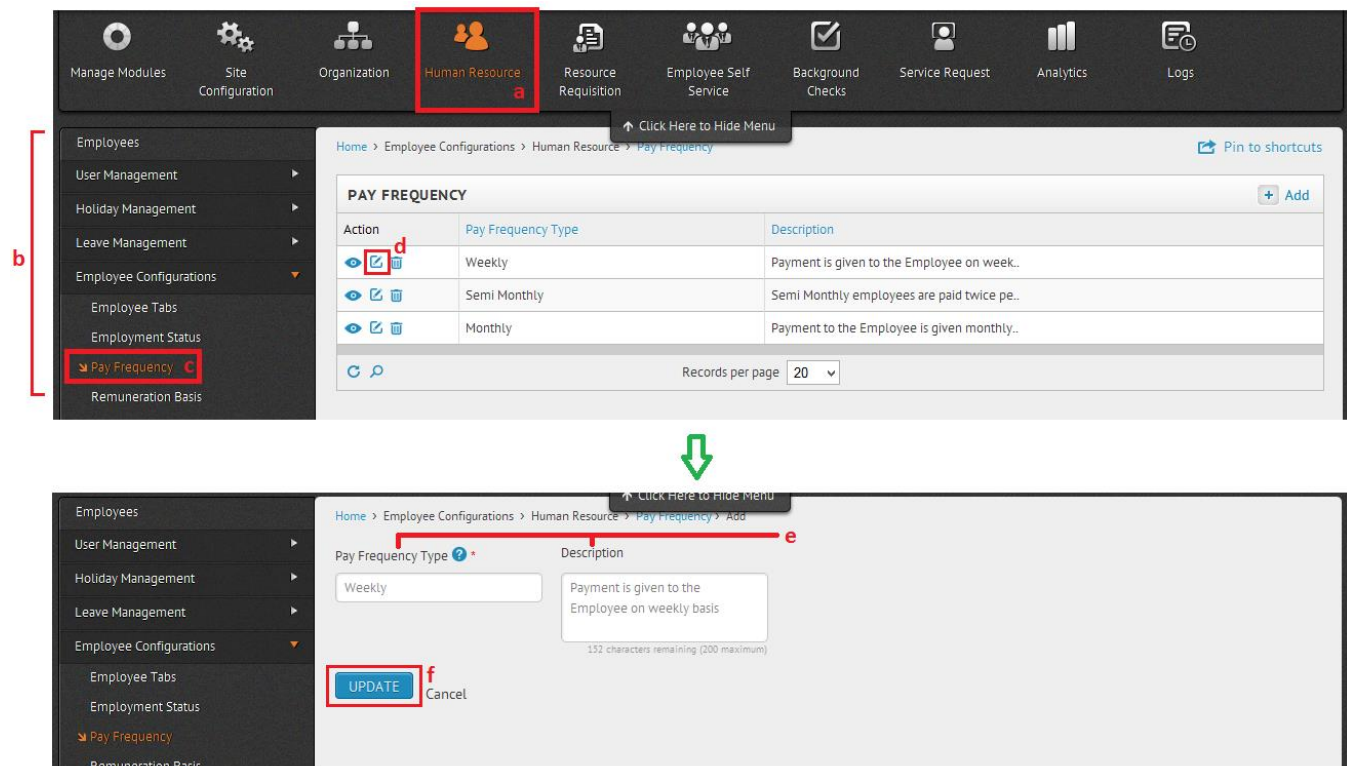For further understanding, refer Figure 6, which explains about editing Pay Frequency

Figure 6

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

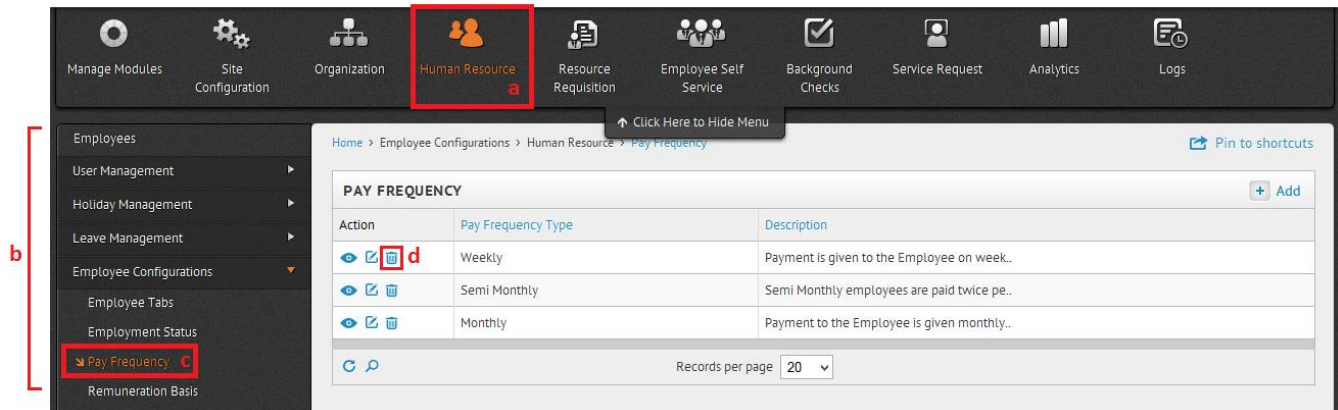For further understanding, refer Figure 7, which explains about deleting Pay Frequency

Figure 7

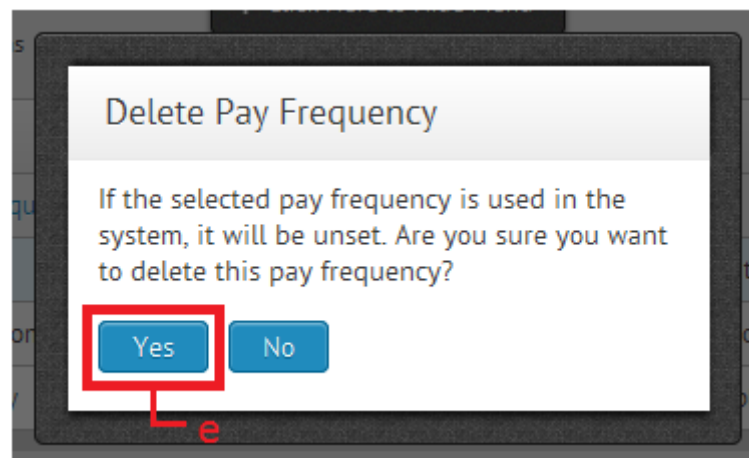e. In the confirmation popup, click on Yes to delete the record

Refer Figure 8

Figure 8

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 9
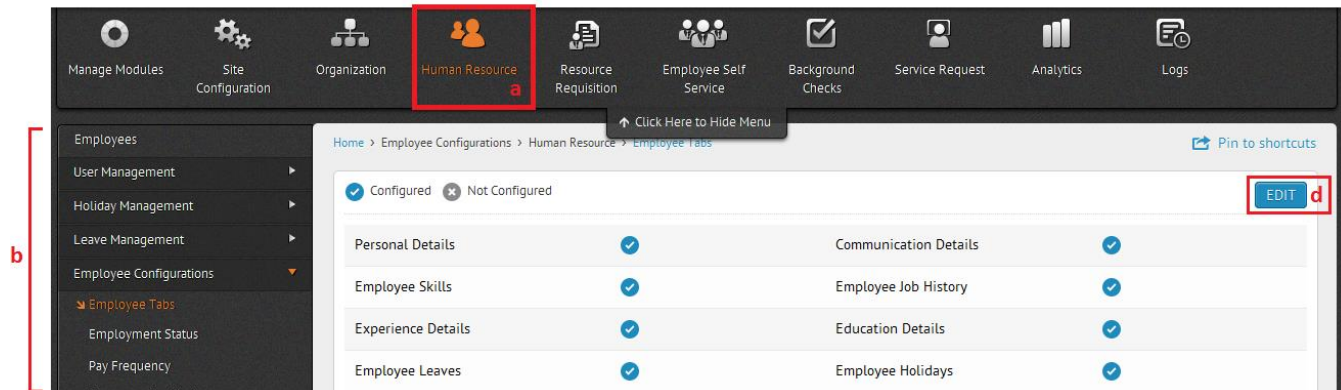
Figure 9

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
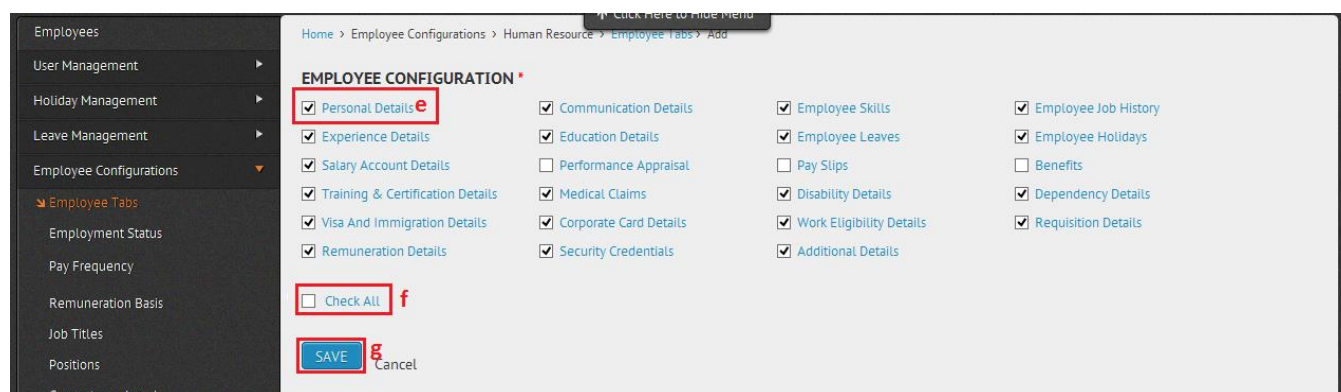g. Click on Save to save the changes

Refer Figure 10

Figure 10

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 11
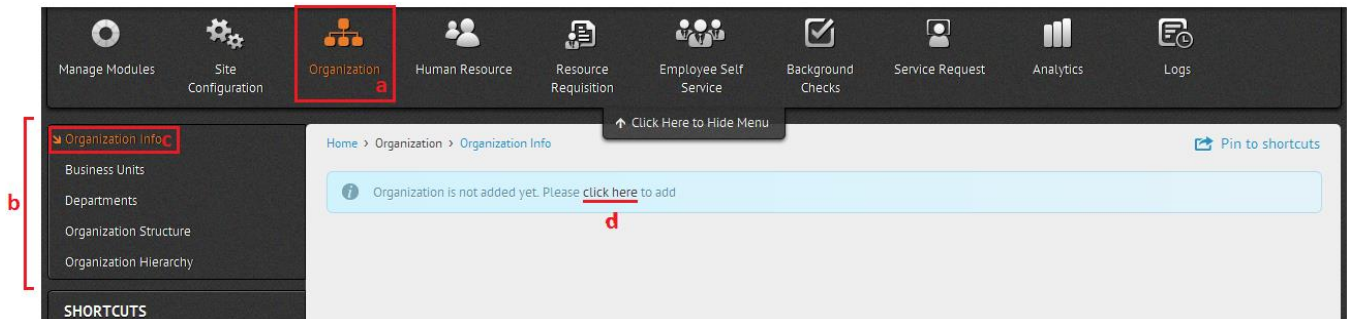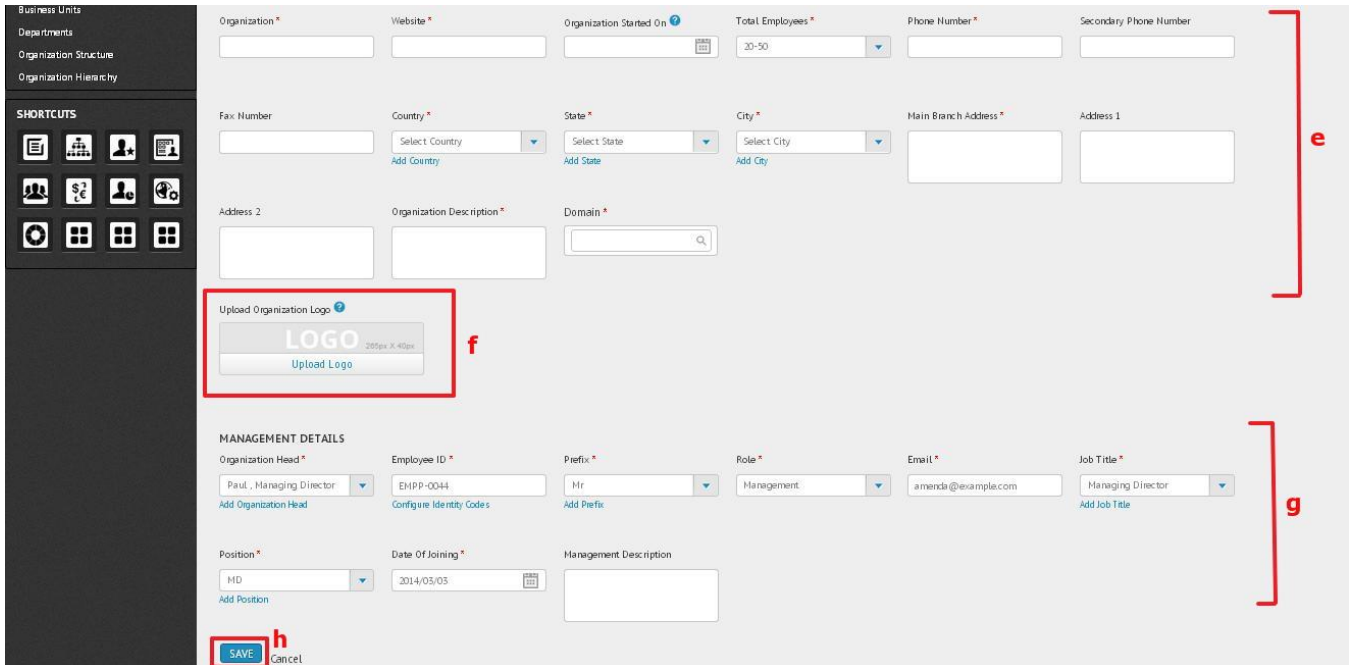
Figure 11

e. Enter the required details
f. Upload your organization logo
g. Under Management Details, enter the essential information
h. Click on Save to add the organization

Refer Figure 12

Figure 12

How to Add Business Units:

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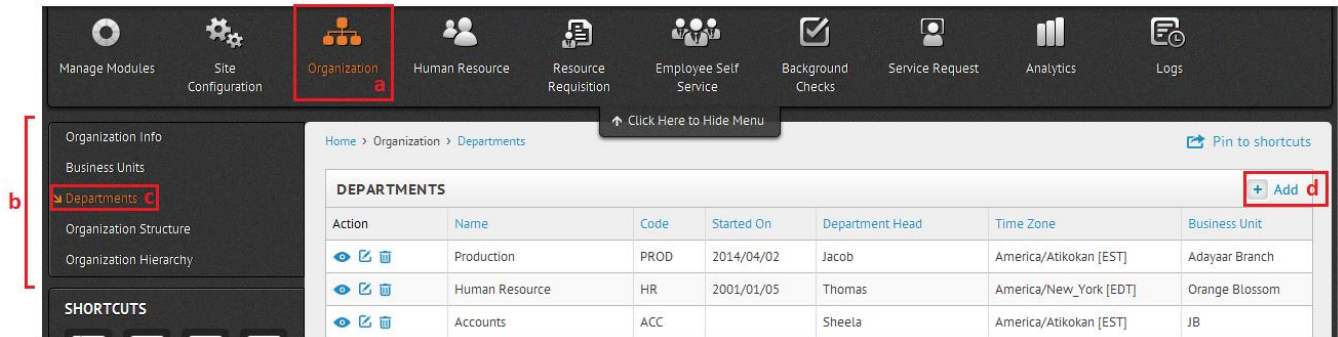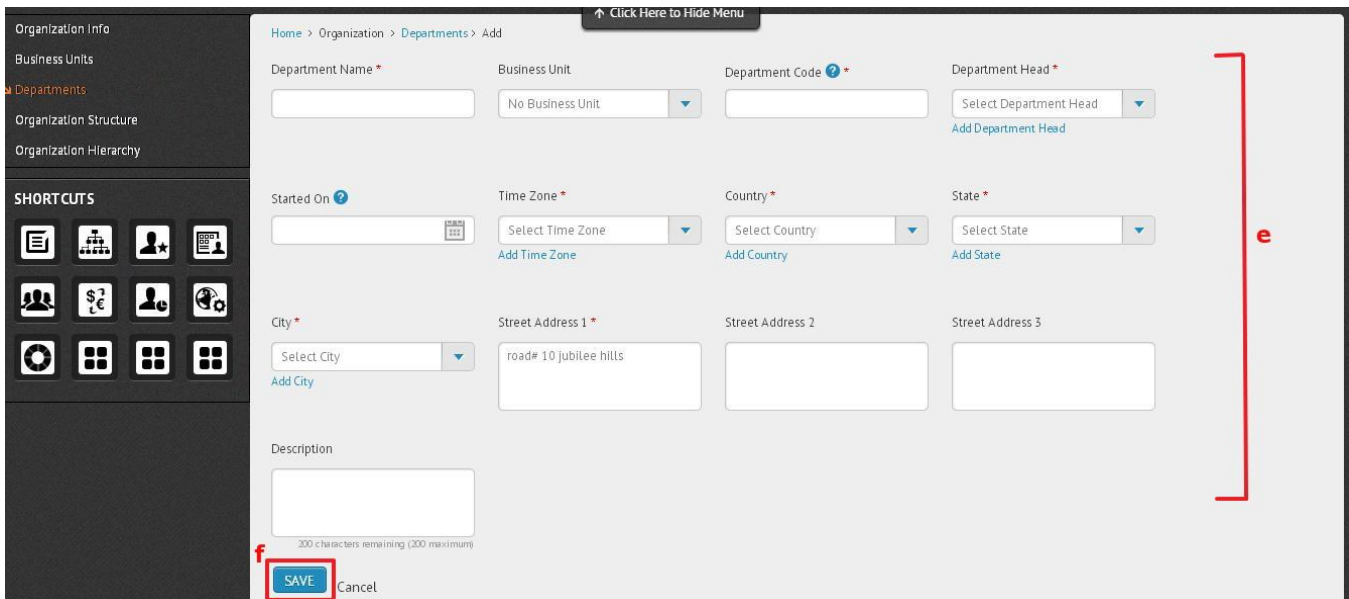d. Click on Add button on the right side panel

Refer Figure 13
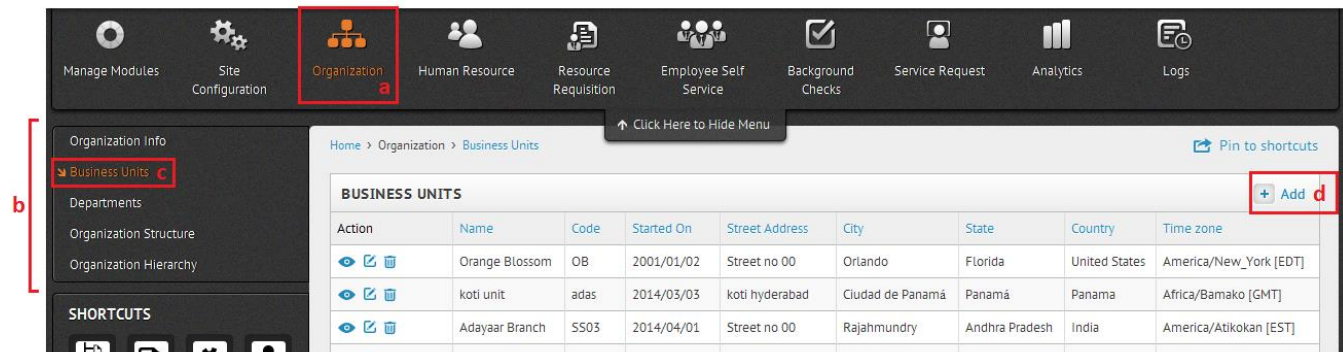
Figure 13

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

Refer Figure 14
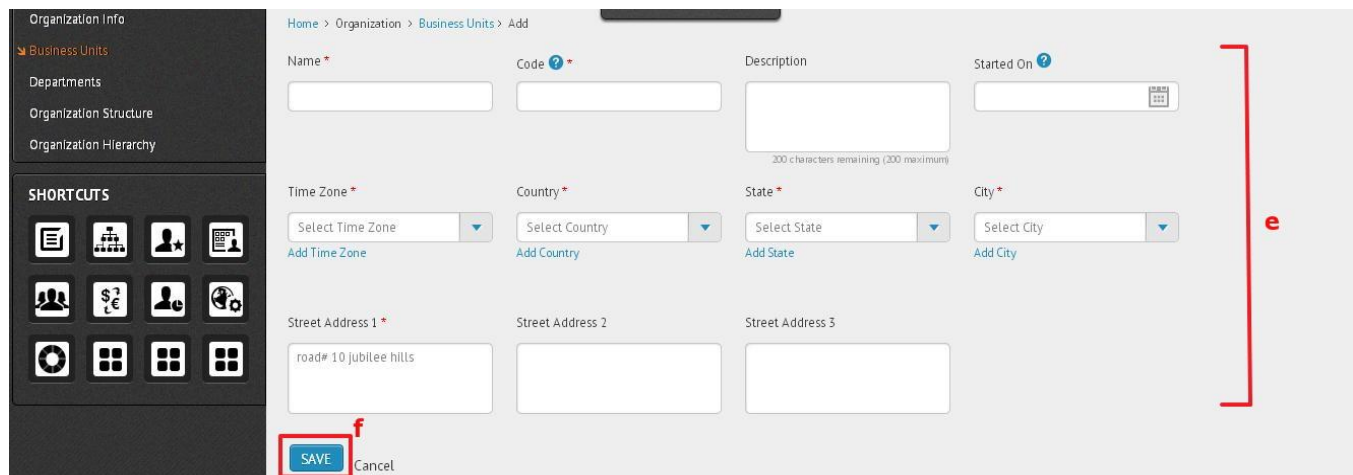
Figure 14

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 15

Figure 15

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

Refer Figure 16

Figure 16

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 17
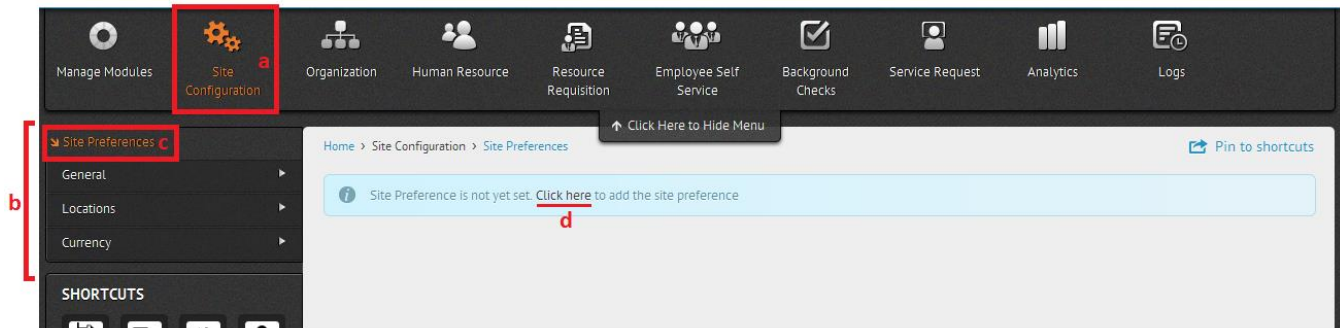
Figure 17

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 18
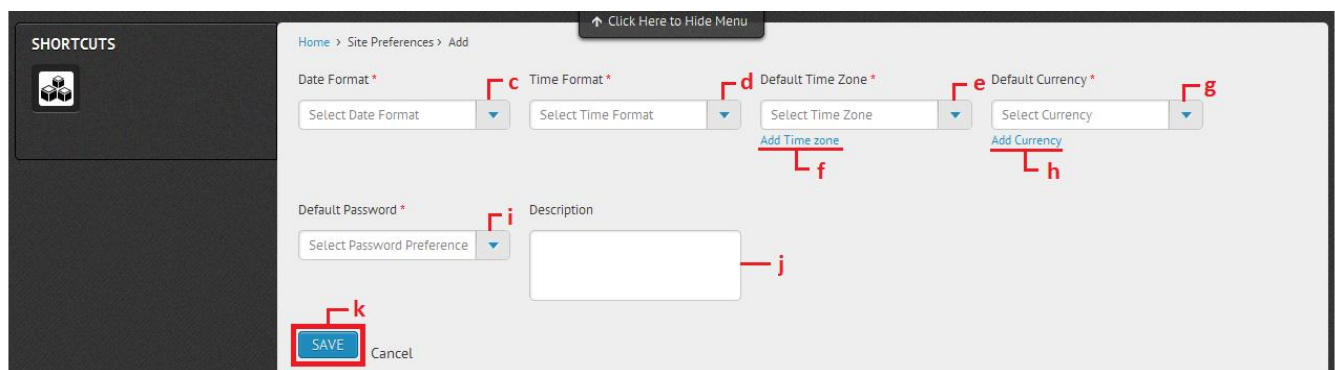
Figure 18

How to Activate and In-activate 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 19
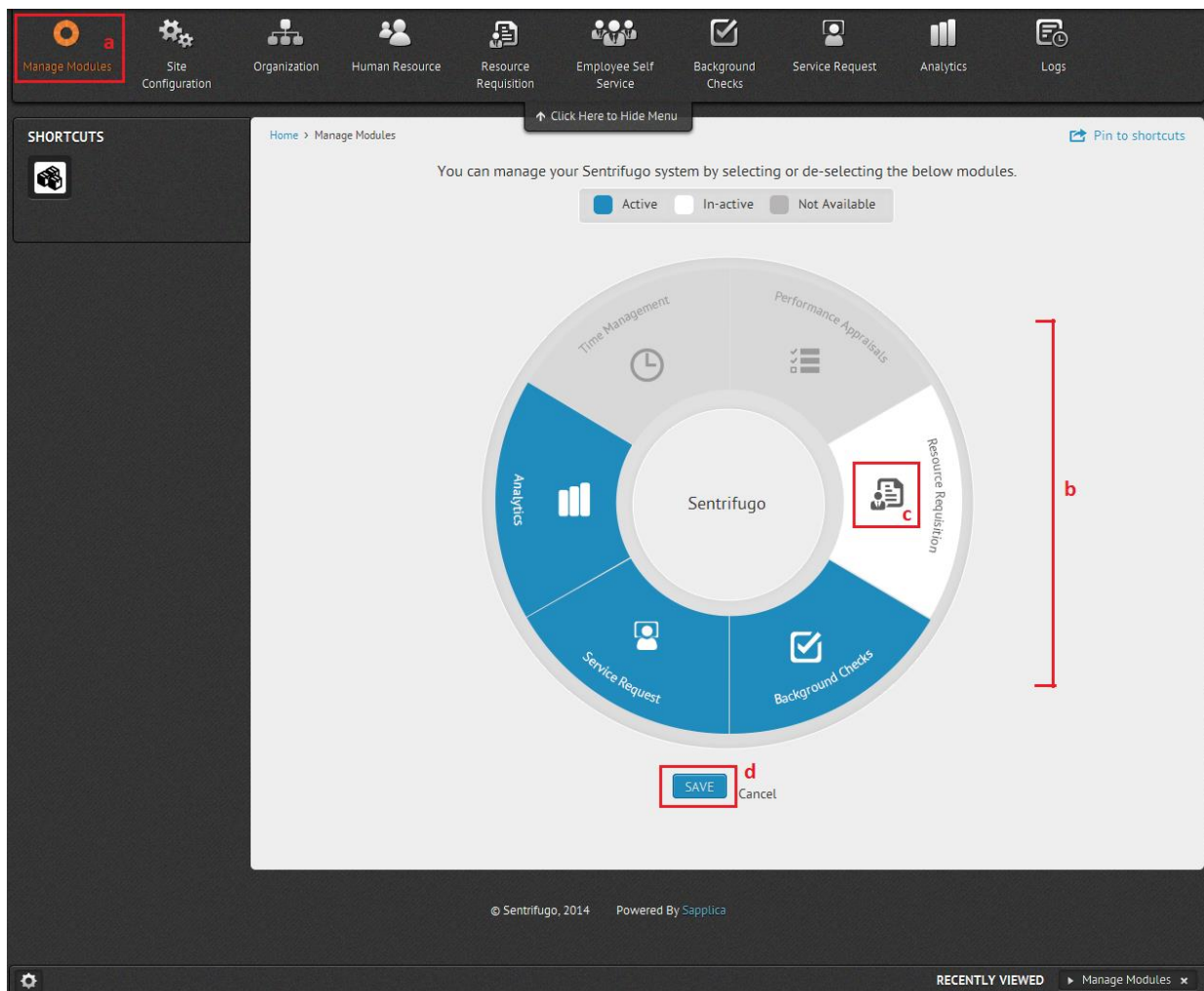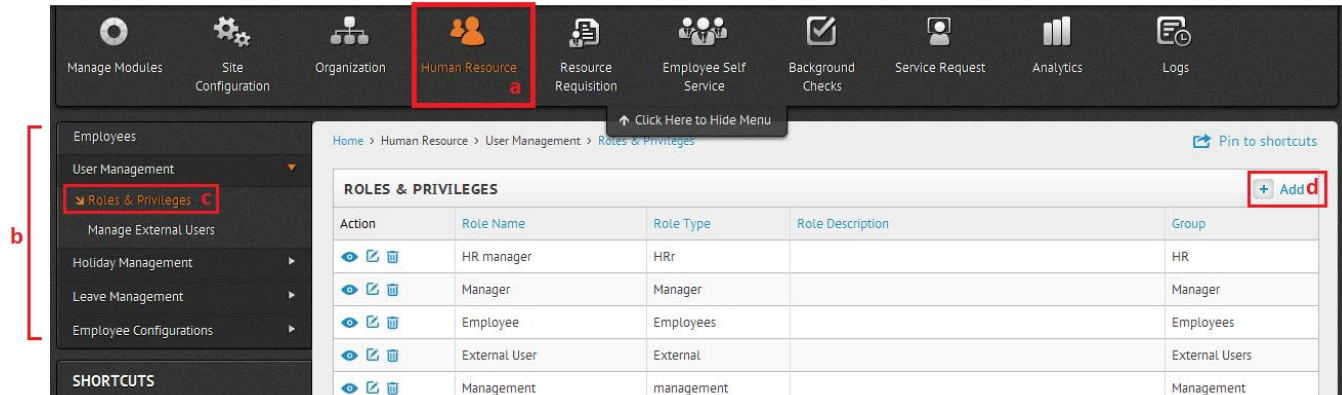
Figure 19

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 20
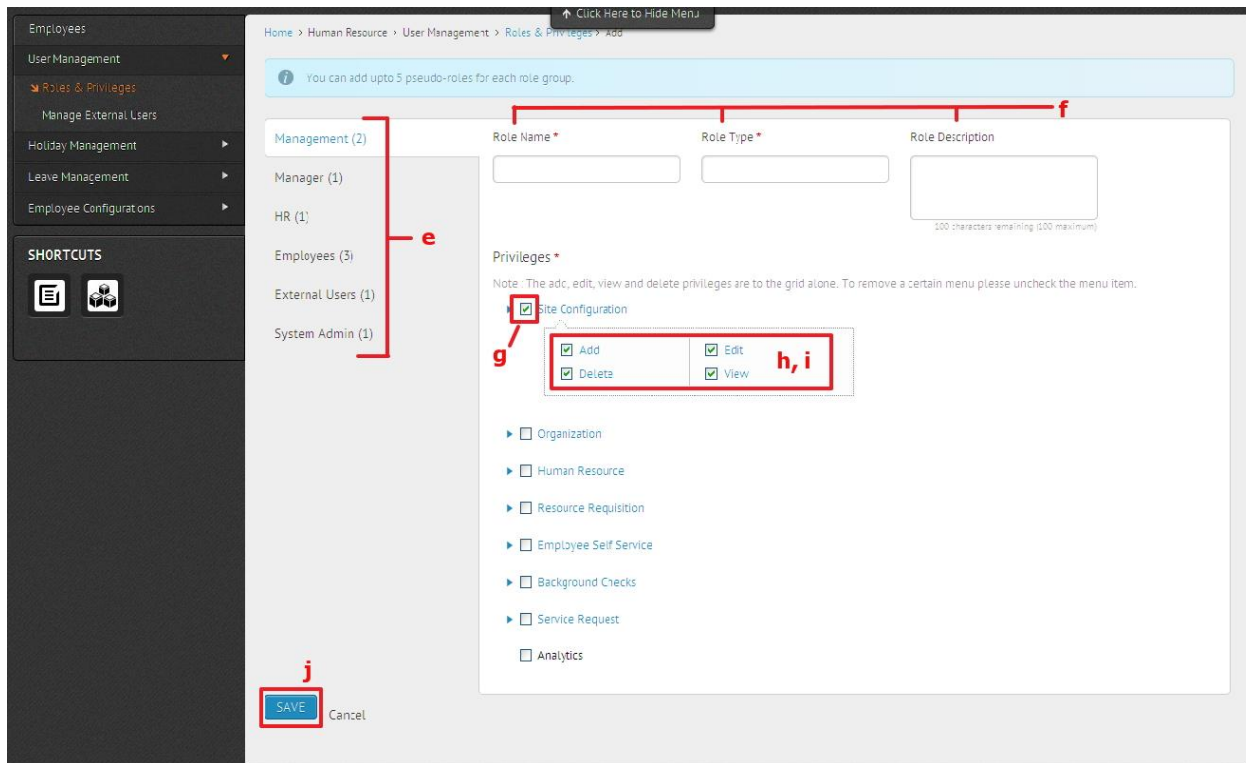
Figure 20

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 21

Figure 21

How do I Add an External User:

a. Click on Human Resource in the top menu
b. The left side panel will display the submenus
c. Click on Manage External Users under User Management
d. Click on Add button in the right side panel
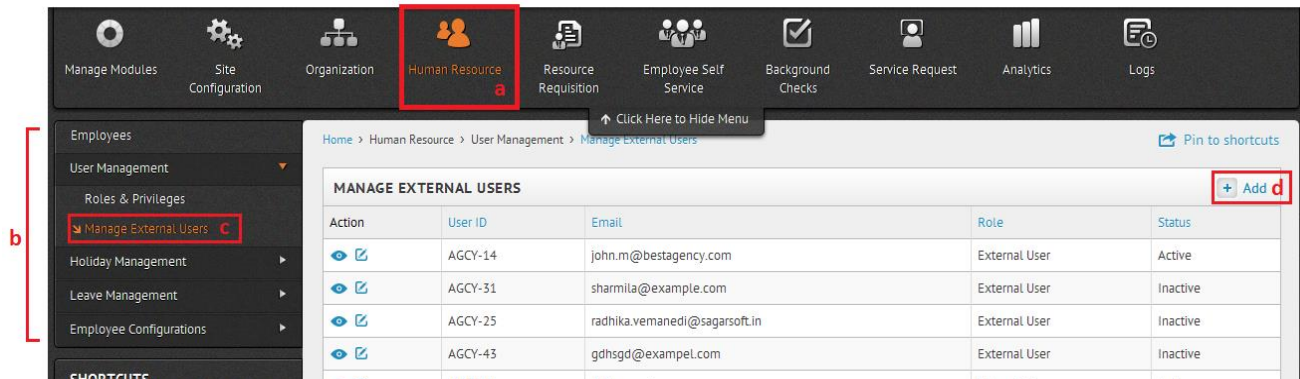
Refer Figure 22

Figure 22

e. Click on Configure Identity Codes to add the identity code for users
f. Enter the Full Name
g. Enter the Email
h. Select a role in Assign a Role dropdown
i. Provide comments if necessary
j. Click on Save to add an external user

Refer Figure 23

Figure 23

How do I Add an Employee:

a. Click on Human Resources in the top menu
b. Click on Employees submenu on the left side panel
c. Click on Add button in the right side panel
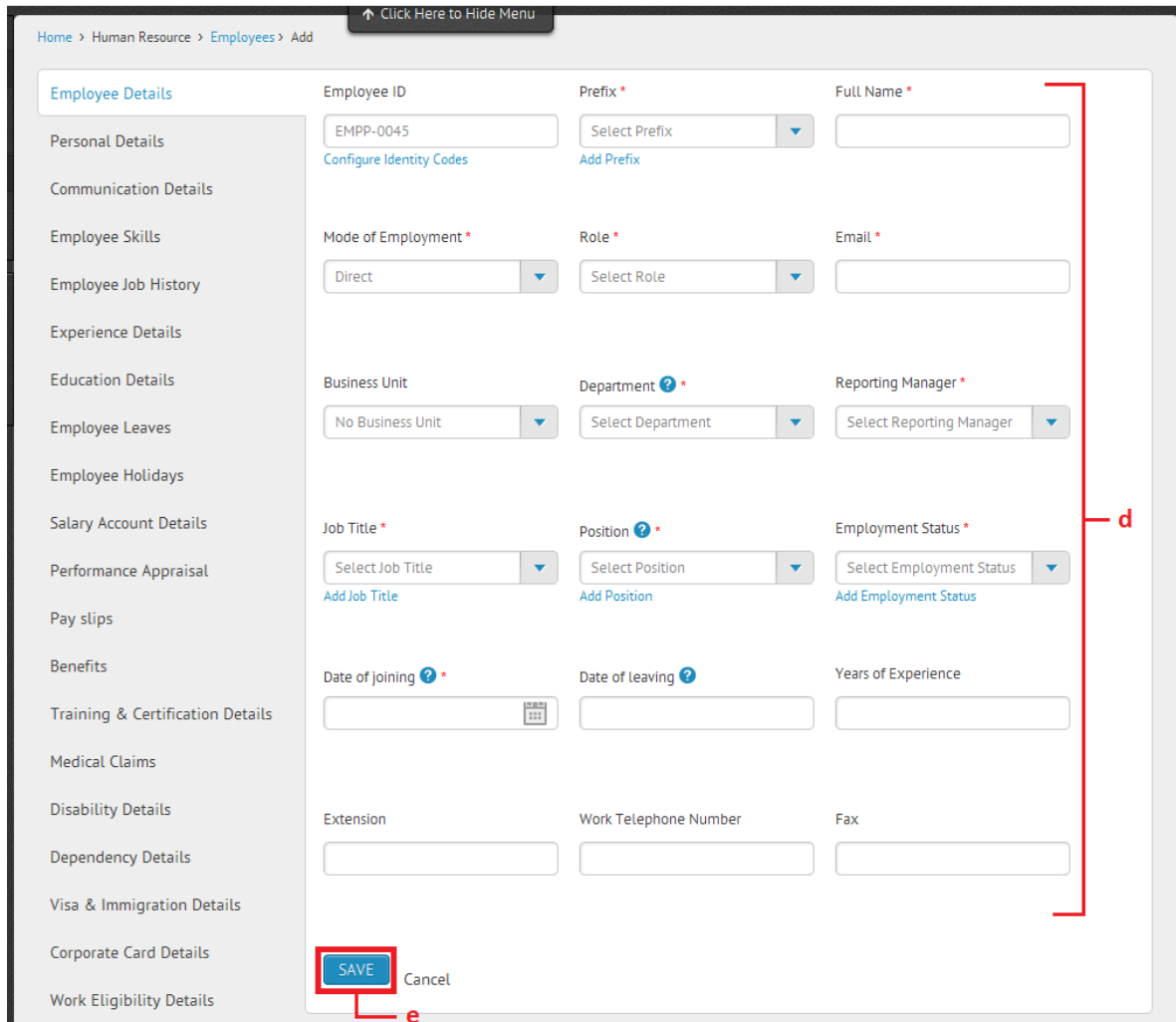
Refer Figure 24
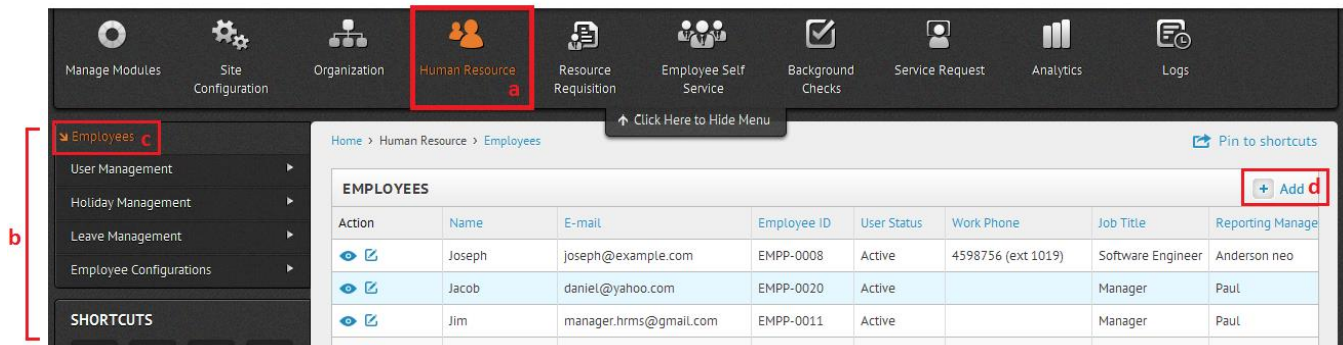
Figure 24

d. Enter the details respective to the employee
e. Click on Save to add the employee

Refer Figure 25

Figure 25

How can I Update My Details:

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

Refer Figure 26
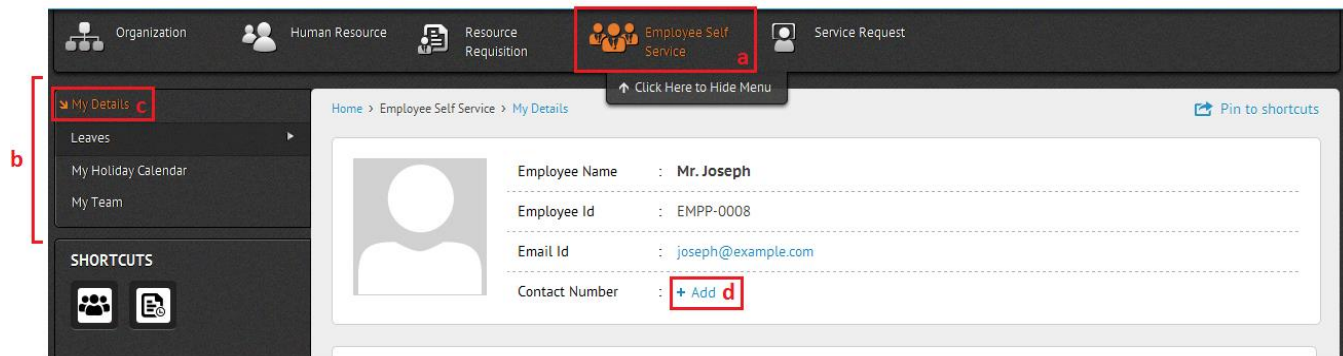
Figure 26

d. In the popup, enter the Contact Number
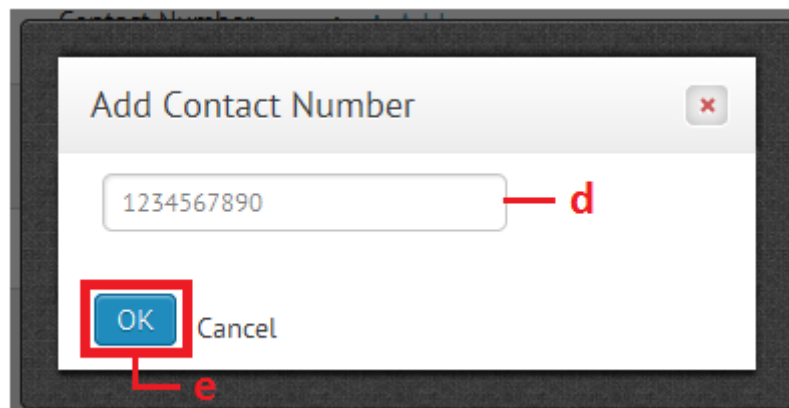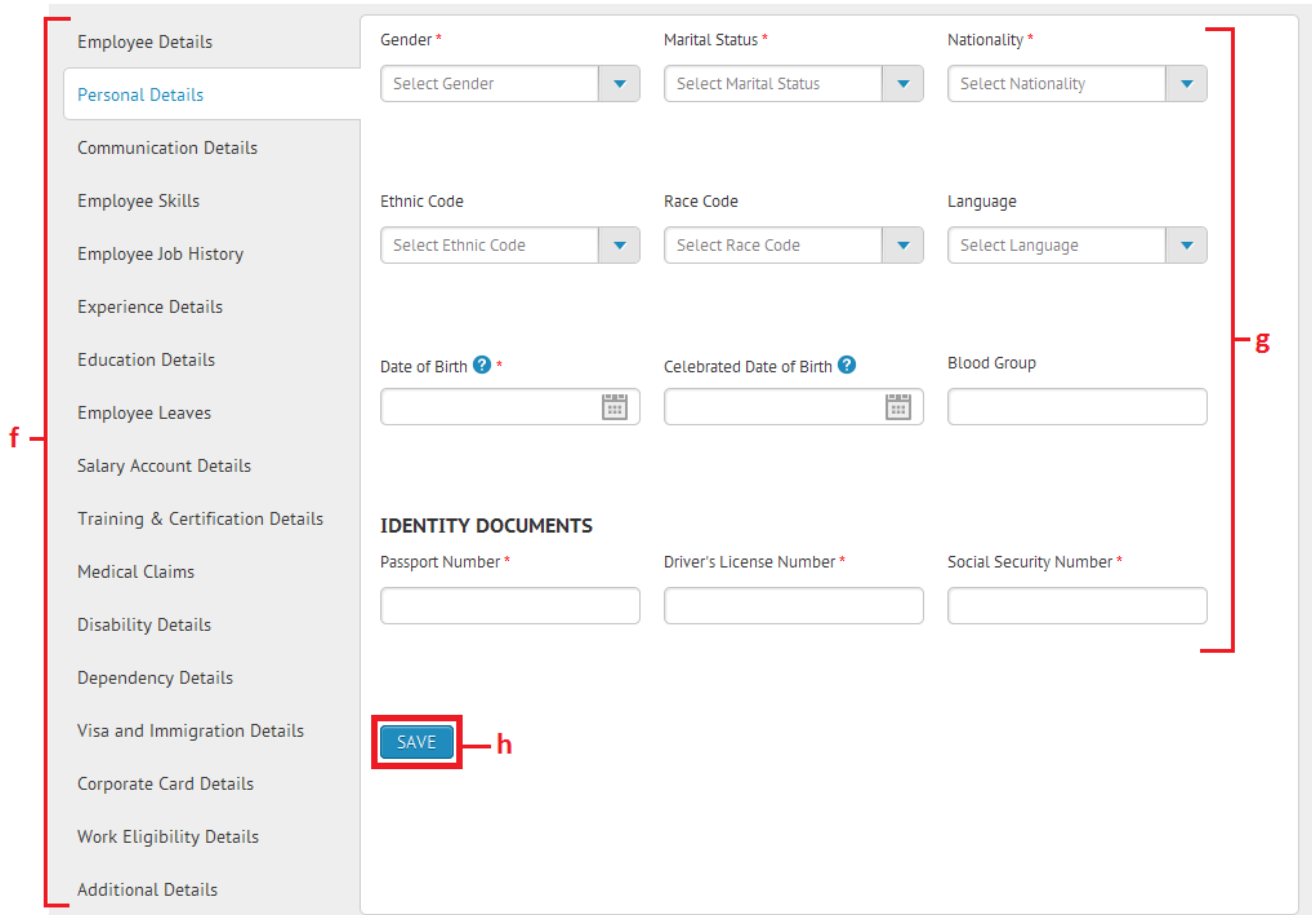e. Click on Ok to add the Contact Number to My Details

Refer Figure 27

Figure 27

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
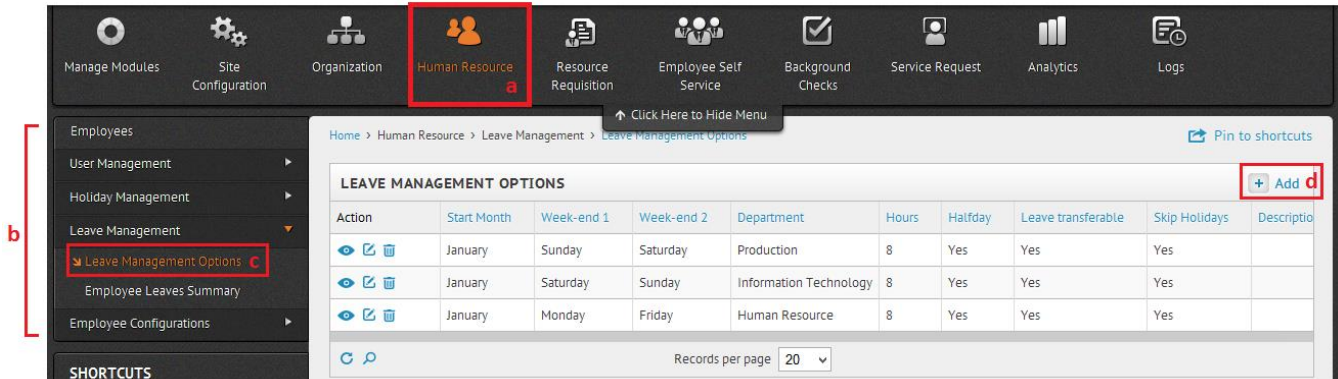h. Click on Save to add or update the details

Refer Figure 28

Figure 28

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 29

Figure 29

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 30

Figure 30

...

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 31, which explain about adding leaves for the month of September
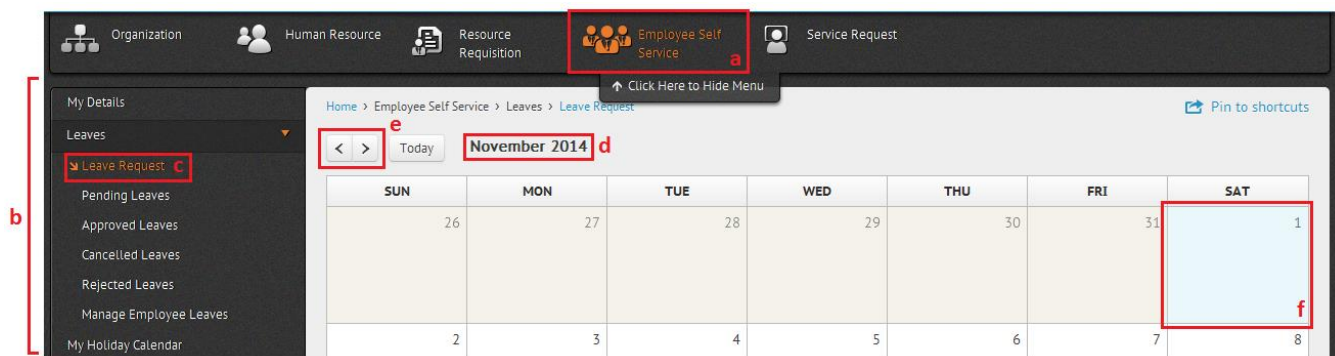

Figure 31

g. To apply leave for consecutive days, drag the mouse on the calendar for desired number of days
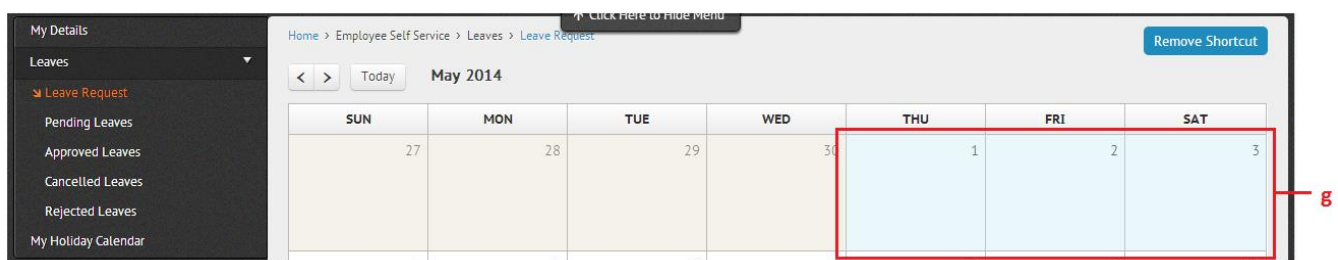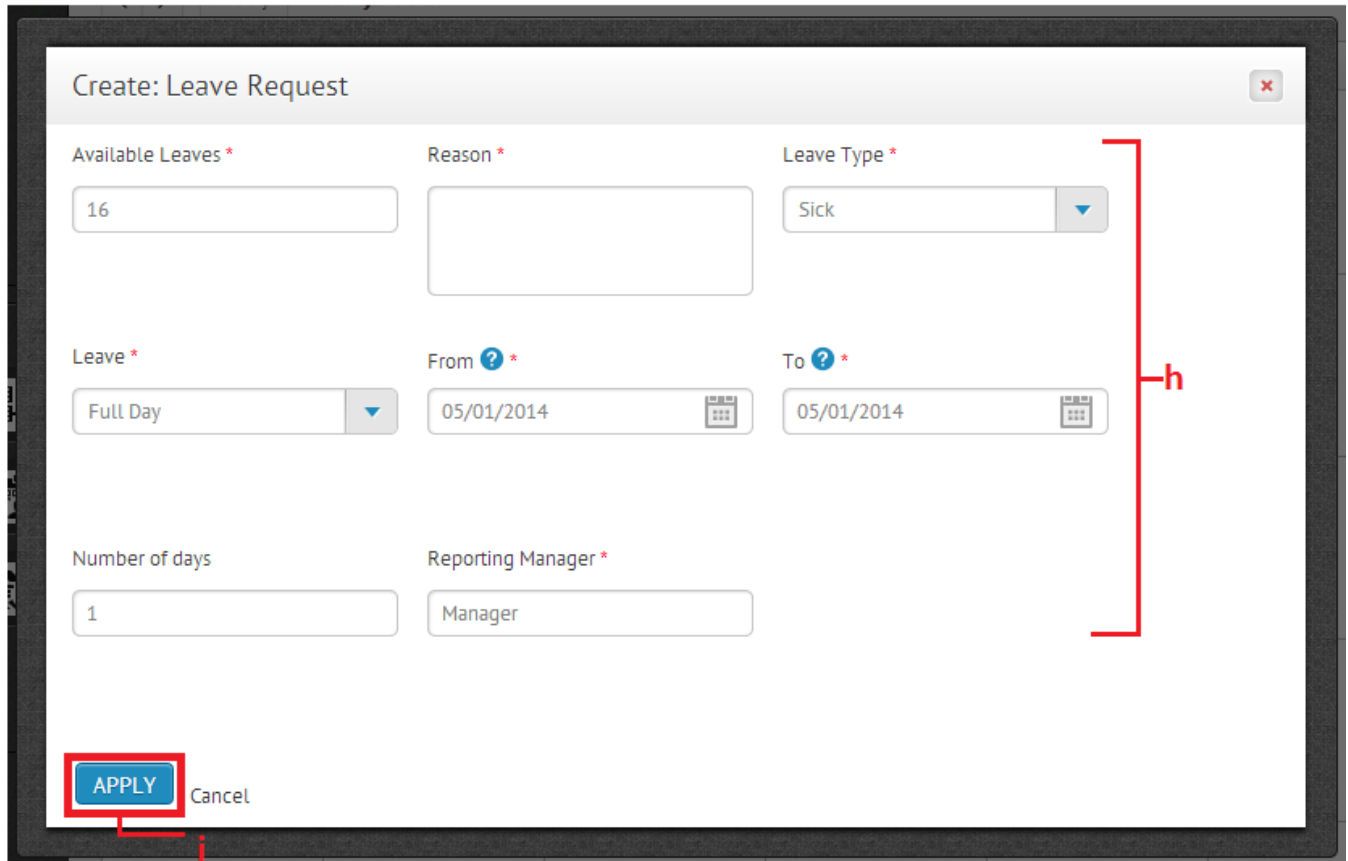
Refer Figure 32

Figure 32

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

Refer Figure 33

Figure 33

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
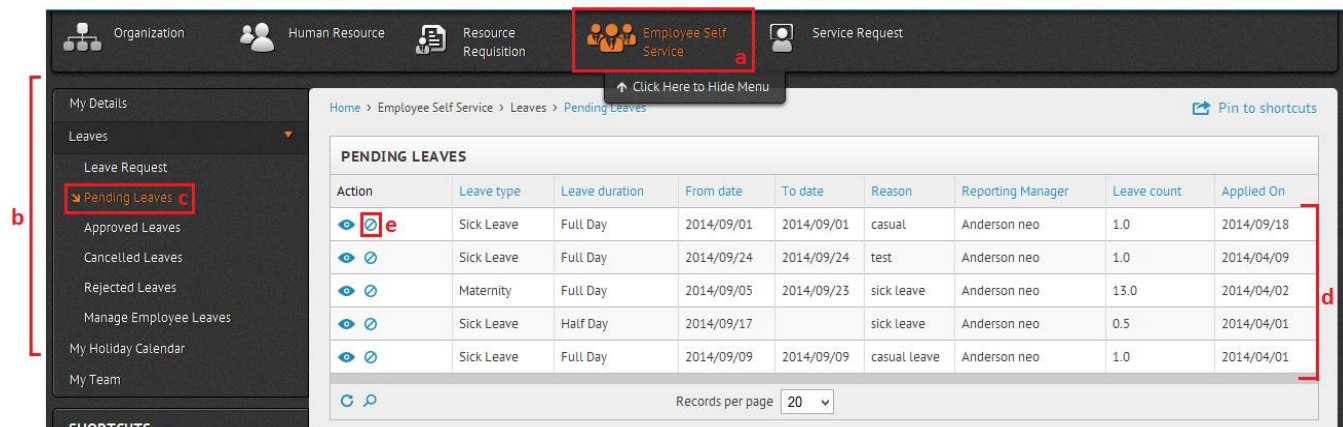
Refer Figure 34

Figure 34

f. In the popup, click on Yes button to cancel the leave
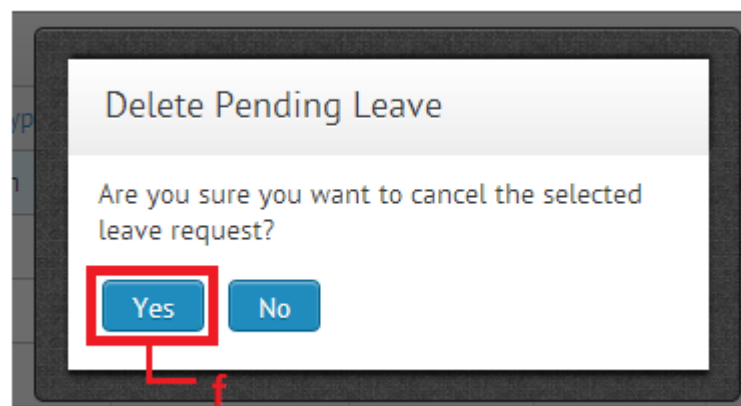
Refer Figure 35

Figure 35

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
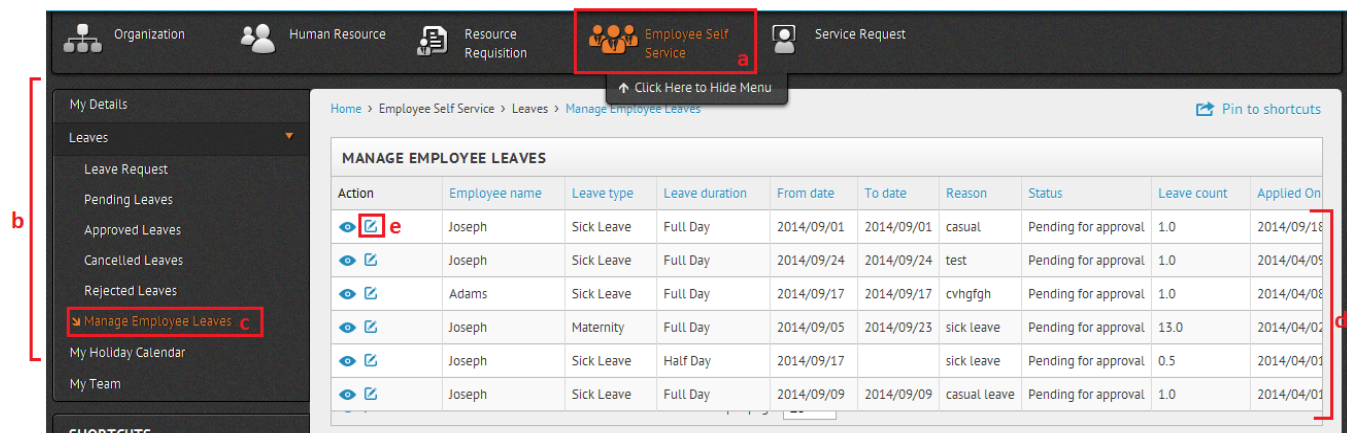
Refer Figure 36

Figure 36

f. Select approve/reject status in the Approve or Reject dropdown
g. Click on Save button to approve or reject the leave request
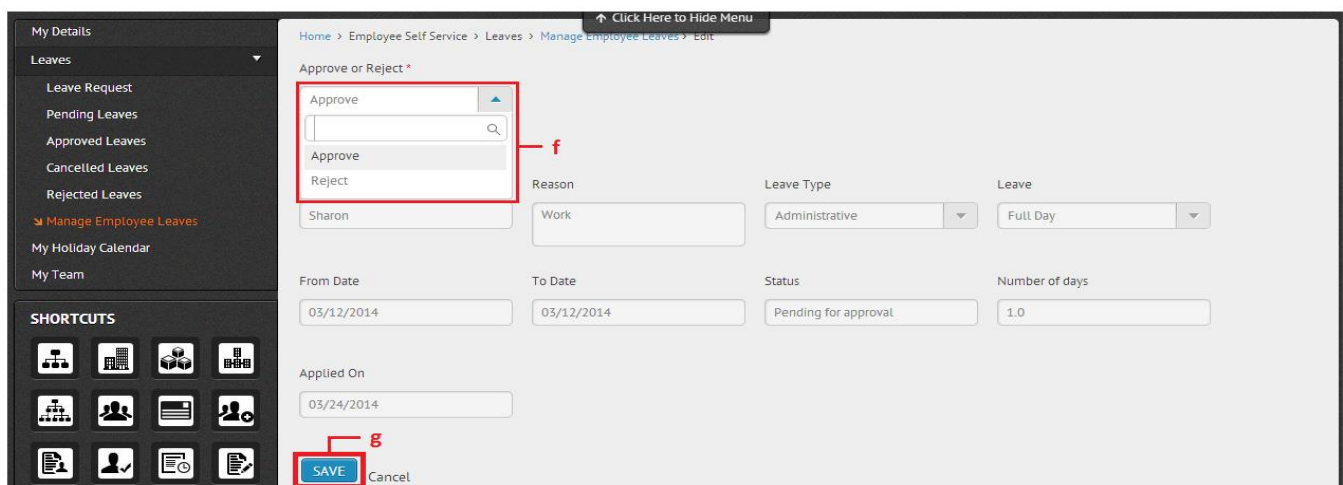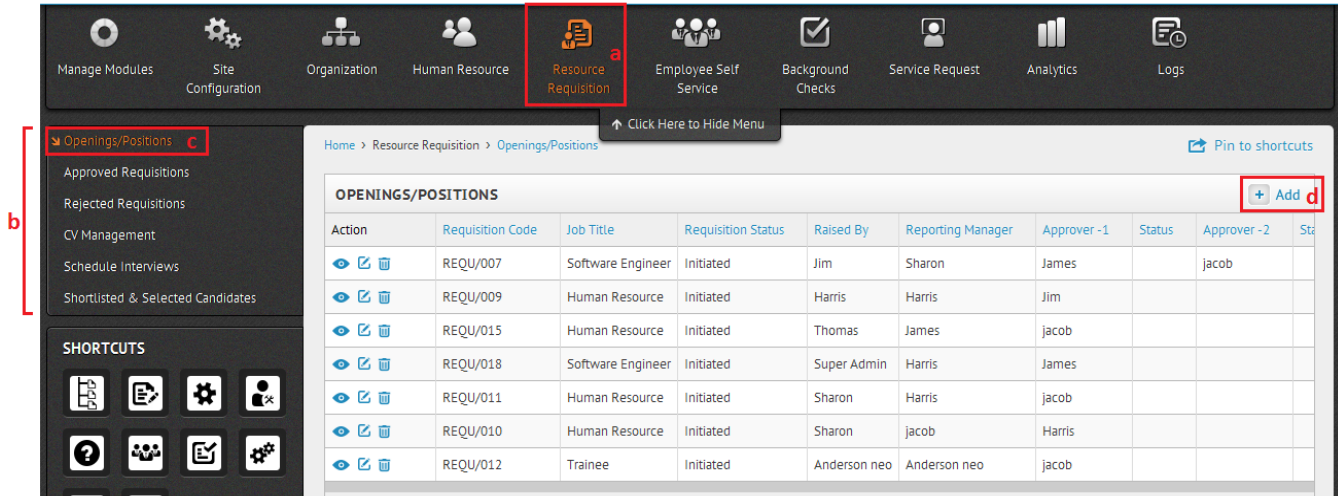
Refer Figure 37

Figure 37

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 38
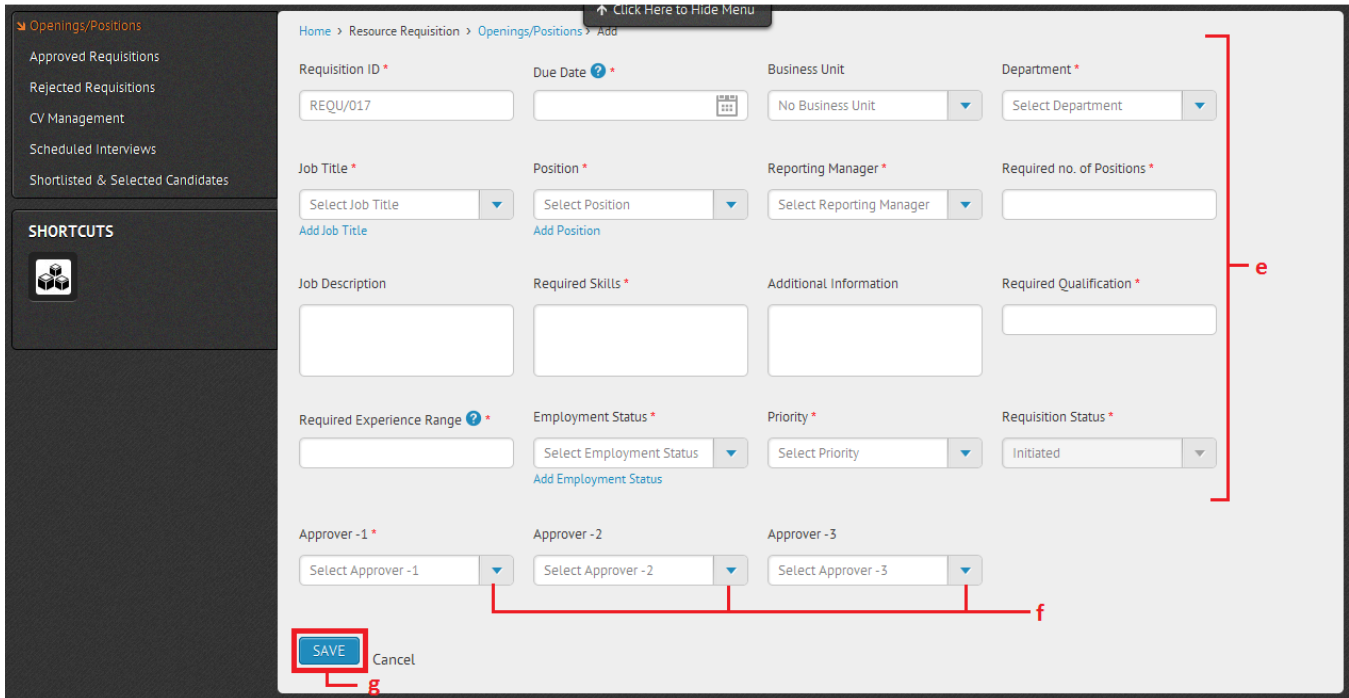
Figure 38

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 39

Figure 39

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
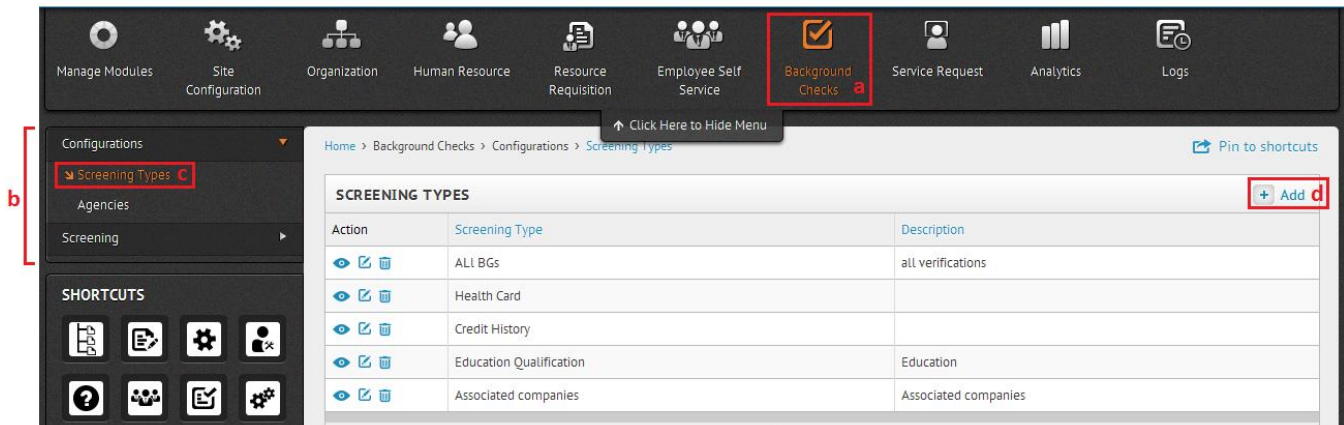d. Click on Add button in the right side panel

Refer Figure 40

Figure 40

e. Enter the Screening Type and Description if necessary
f. Click on Save button to add the Screening Type
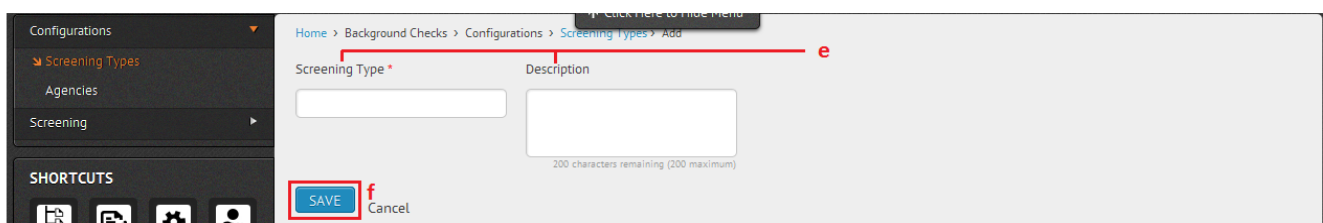
Refer Figure 41

Figure 41

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
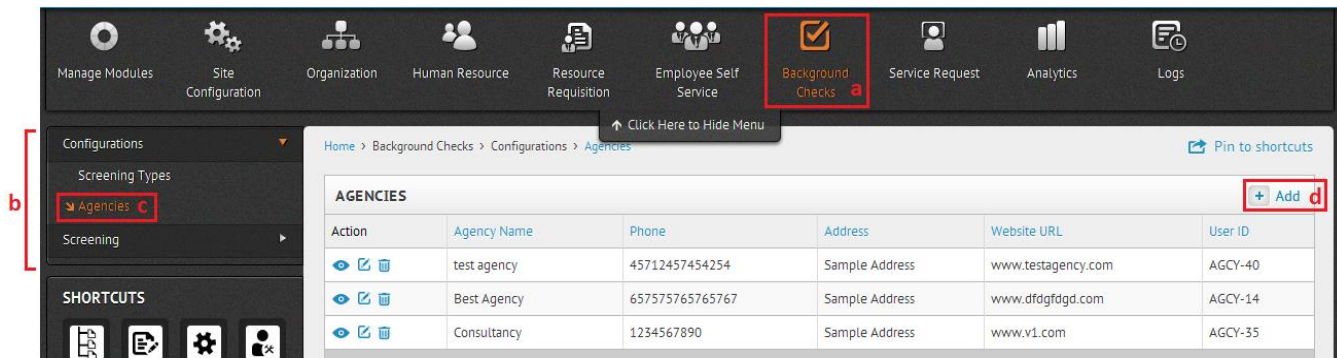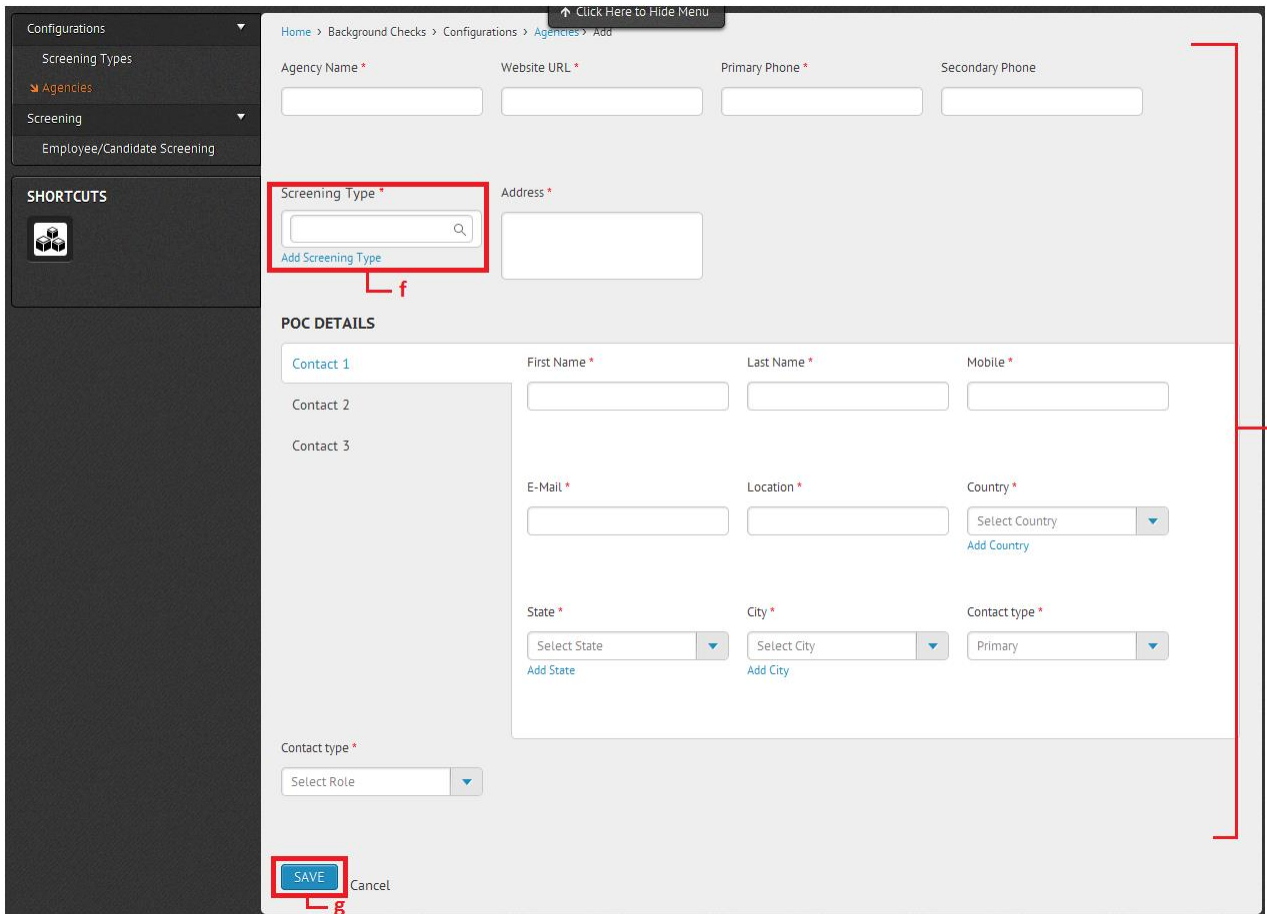d. Click on Add Button in the right side panel

Refer Figure 42

Figure 42

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 43

Figure 43

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
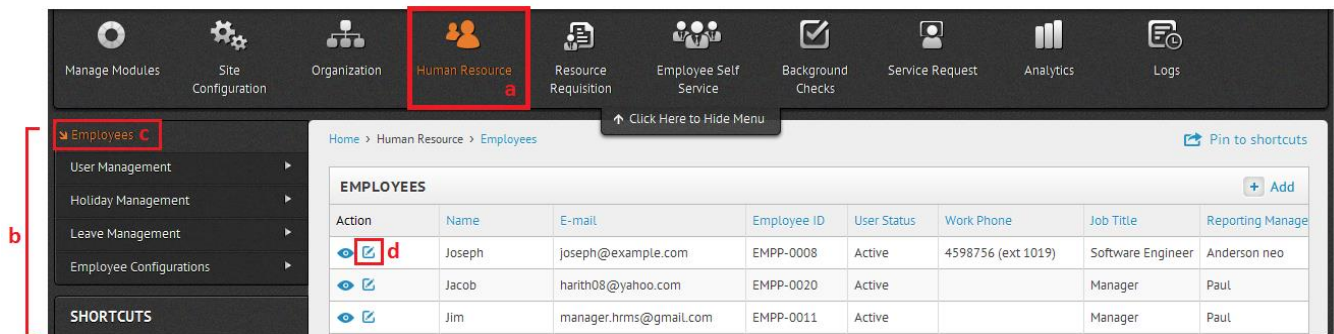d. Click on Edit icon corresponding to an employee in the right side panel

Refer Figure 44

Figure 44

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

Refer Figure 45
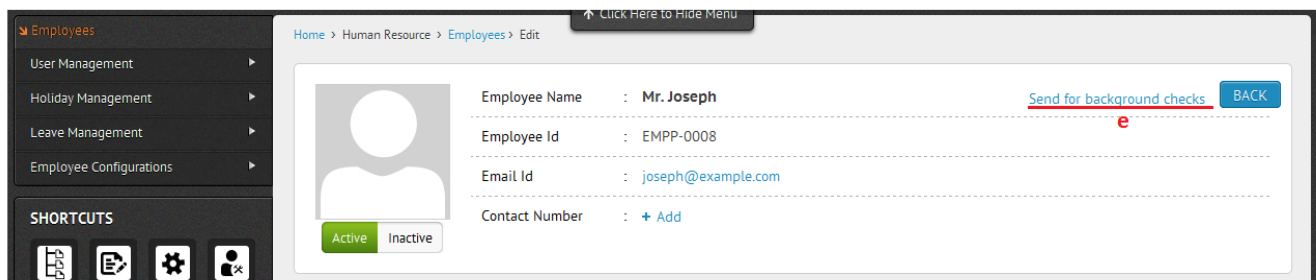
Figure 45

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 46
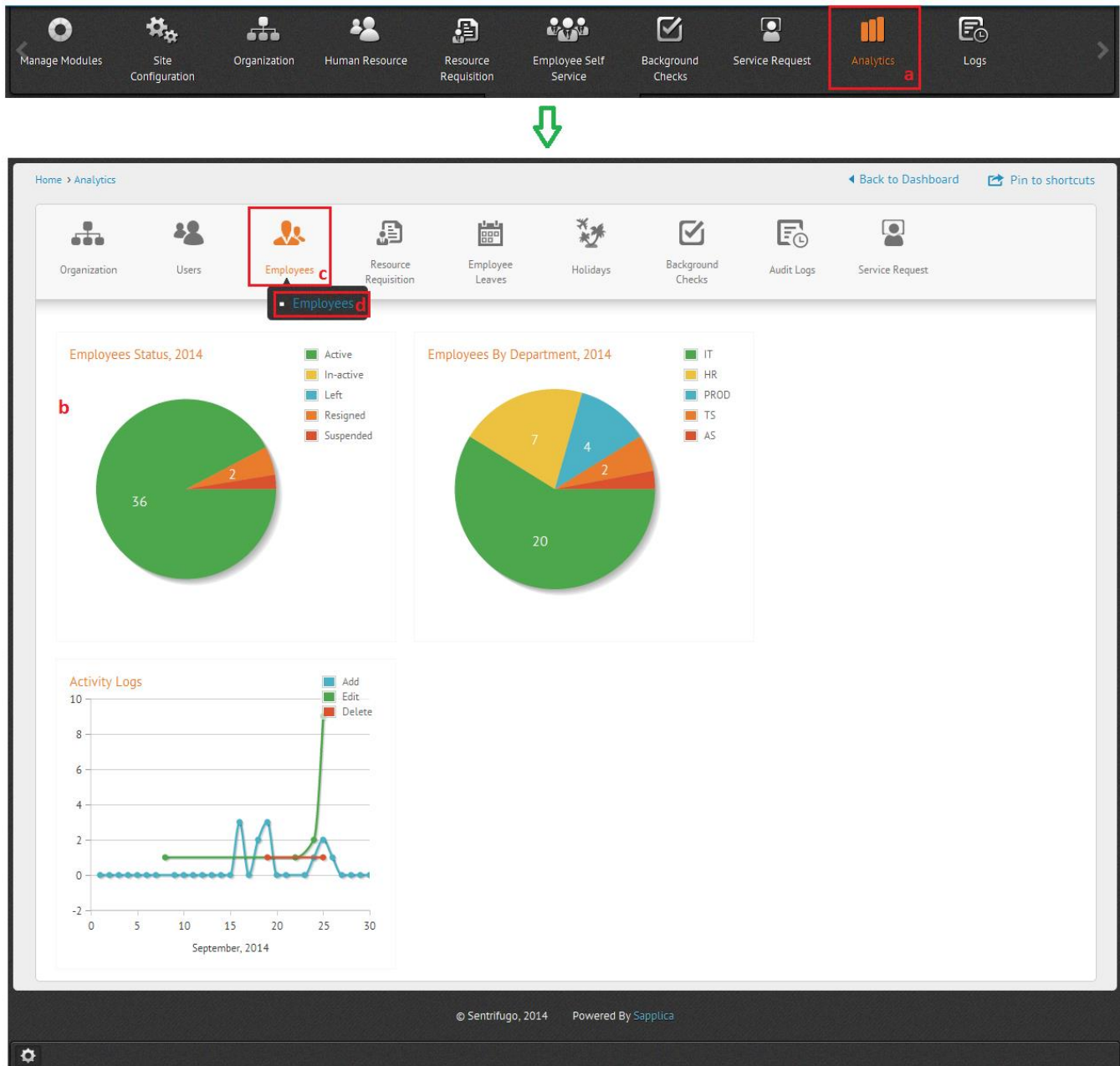
Figure 46

e. In the selected submenu page, click on Export to PDF or Export to Excel to generate report
Refer Figure 47

Figure 47

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 48

Figure 48

Where can you View Activity log:

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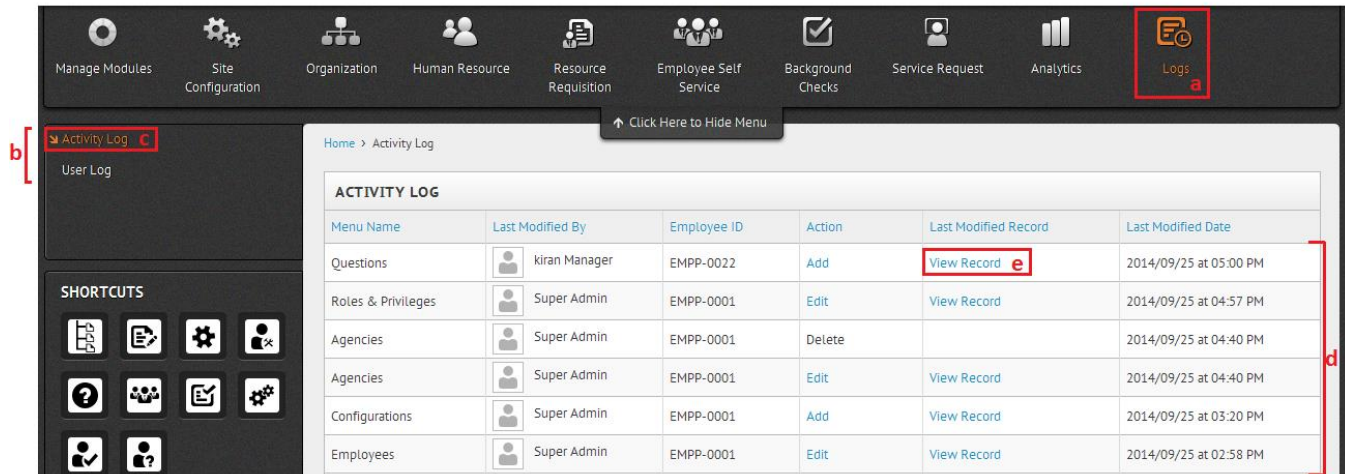e. Click on View Record to view the modified record.

Refer Figure 49

Figure 49

Where can I View User log:

a. Click on Logs in the top menu
b. The left side panel will display the submenus
c. Click on User log
d. View the logs of all the users in the right side panel

Refer Figure 50

Figure 50

Looking to Set Shortcuts:

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

Refer Figure 51

Figure 51

Or

c. Click on logged in user's name in the top right of the header
d. Click on Settings in the dropdown
e. Select Shortcuts button in the settings page
f. Drag and drop the selected menu item(s) in the shortcuts box
g. Click on Save to add shortcuts in the Shortcuts panel

Refer Figure 52
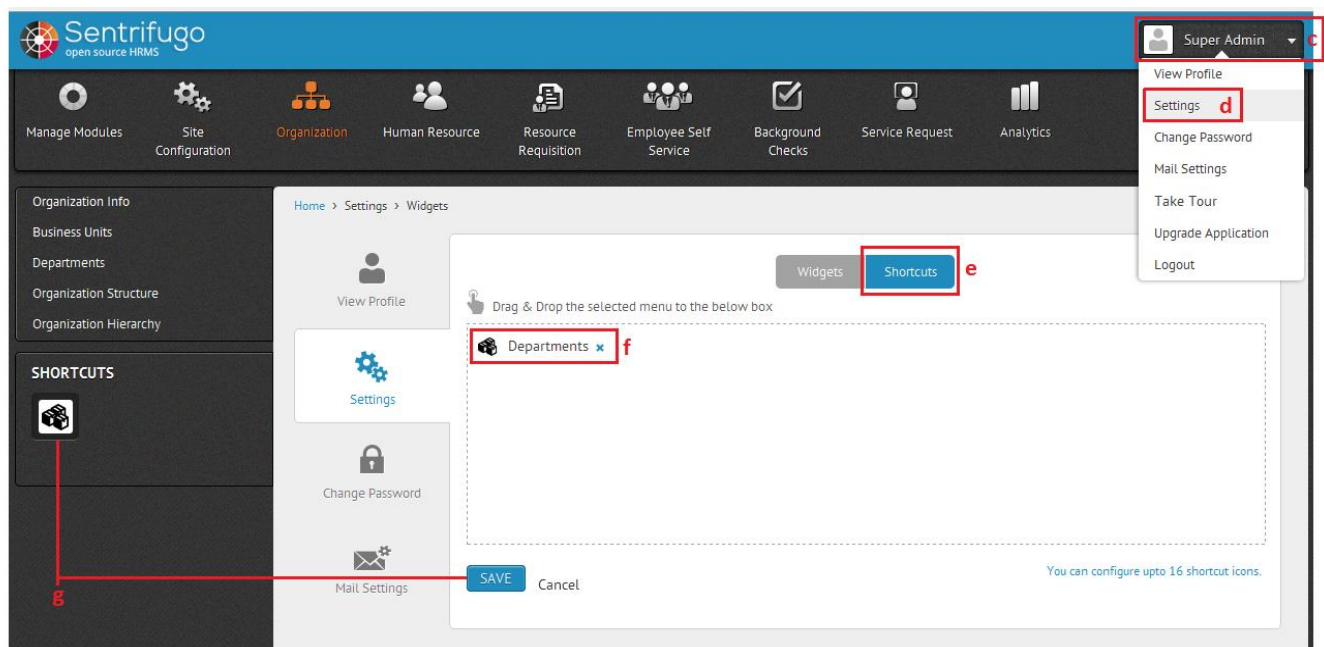
Figure 52

You can also create Shortcuts as you browse through the application

h. Click on a desired module in the top menu
i. Click on the desired submenu in the left side panel
j. Click on Create Shortcut in the right side panel

For further understanding, Refer Figure 53, which explains about creating a shortcut as you browse through the application
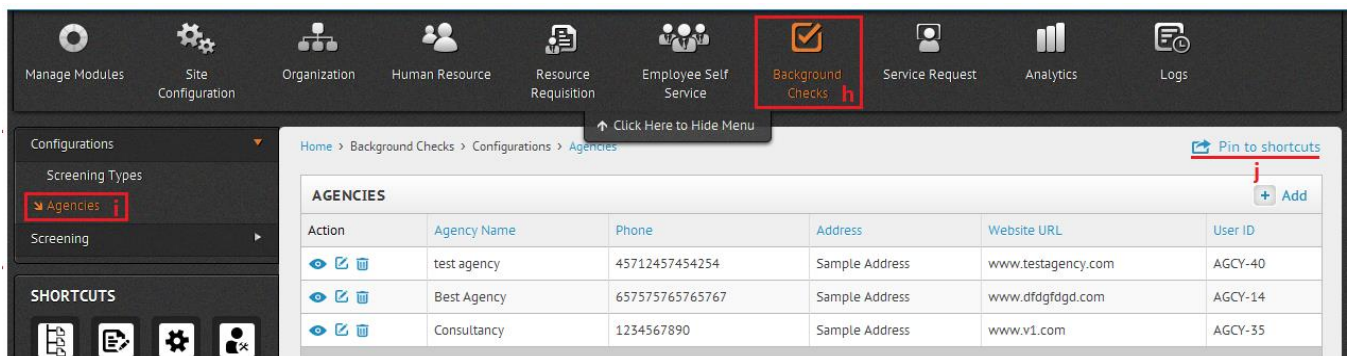
Figure 53

Looking to Set Widgets:

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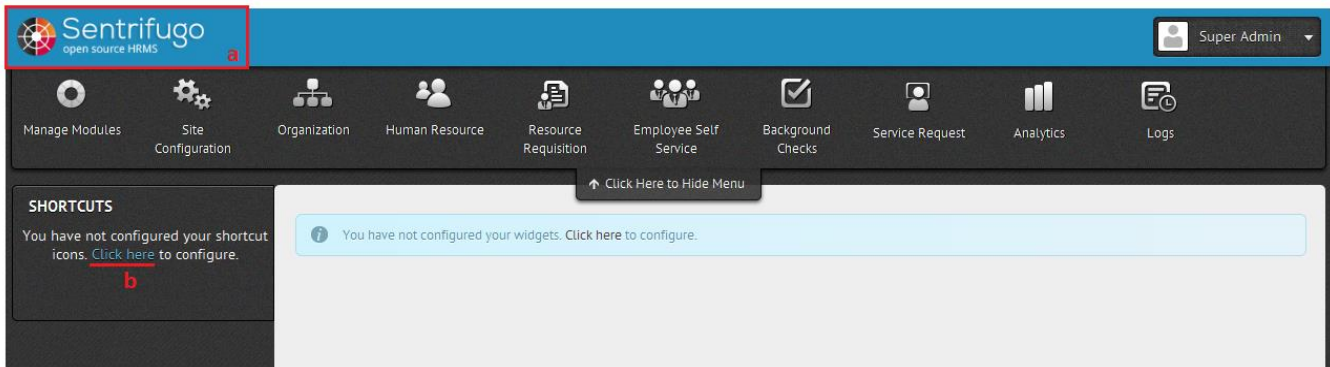b. Click on Click here link in the Widgets panel in the right side

Refer figure 54

Figure 54

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 55

Figure 55

Want to Configure Service Request:

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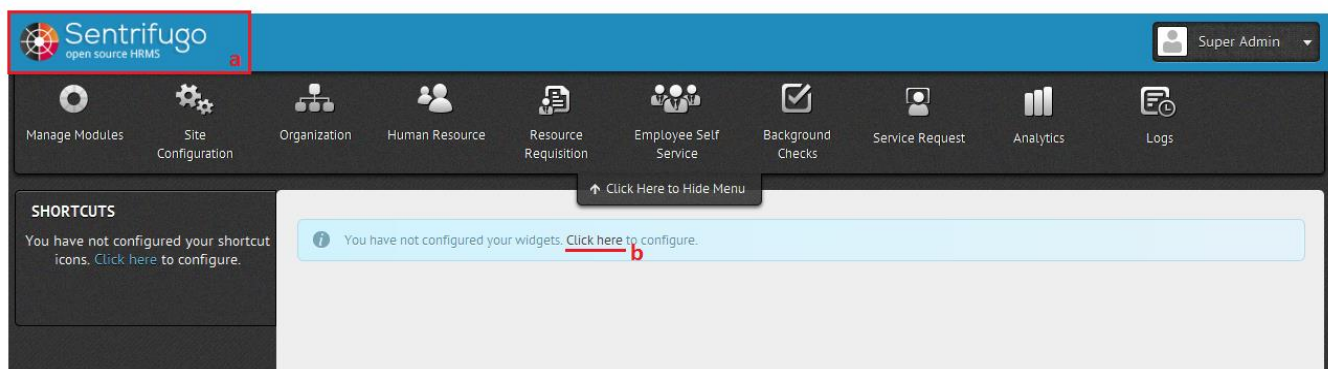c. Click on desired submenu
d. Click on Add button on the right side panel
e. Enter the Required details
f. Click Save button to add the details

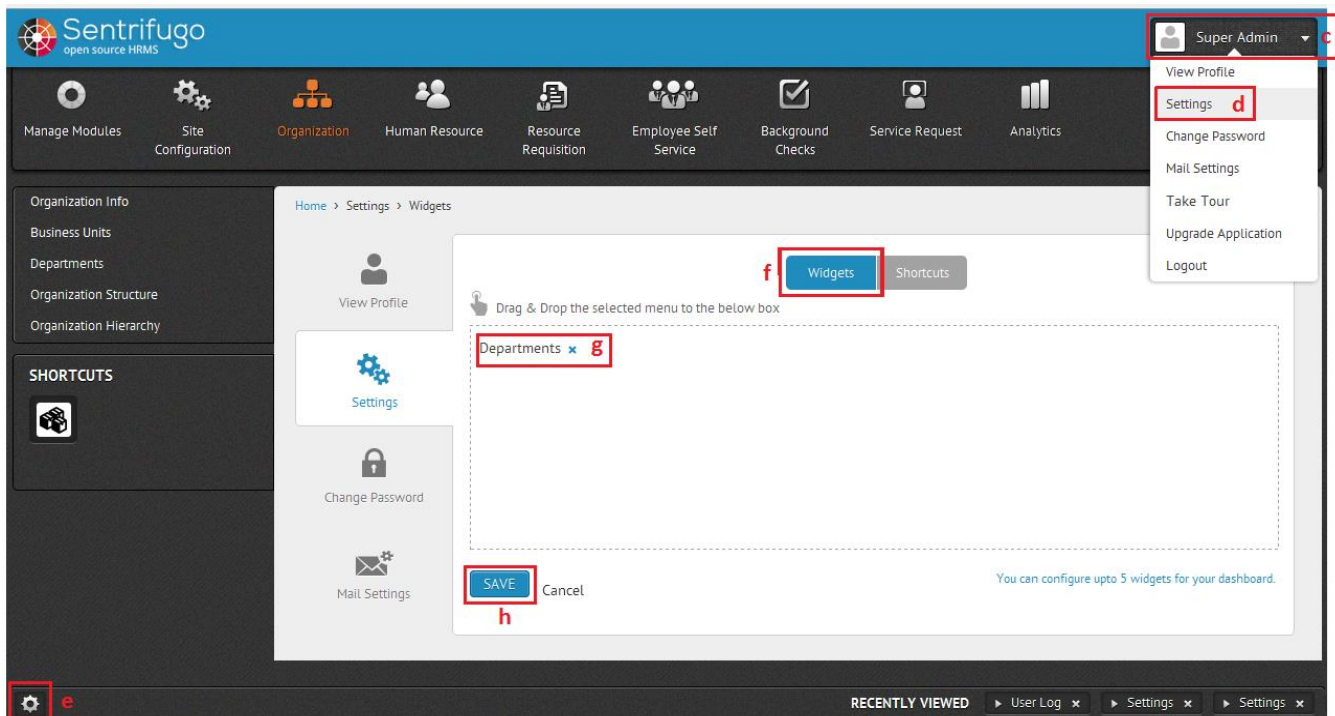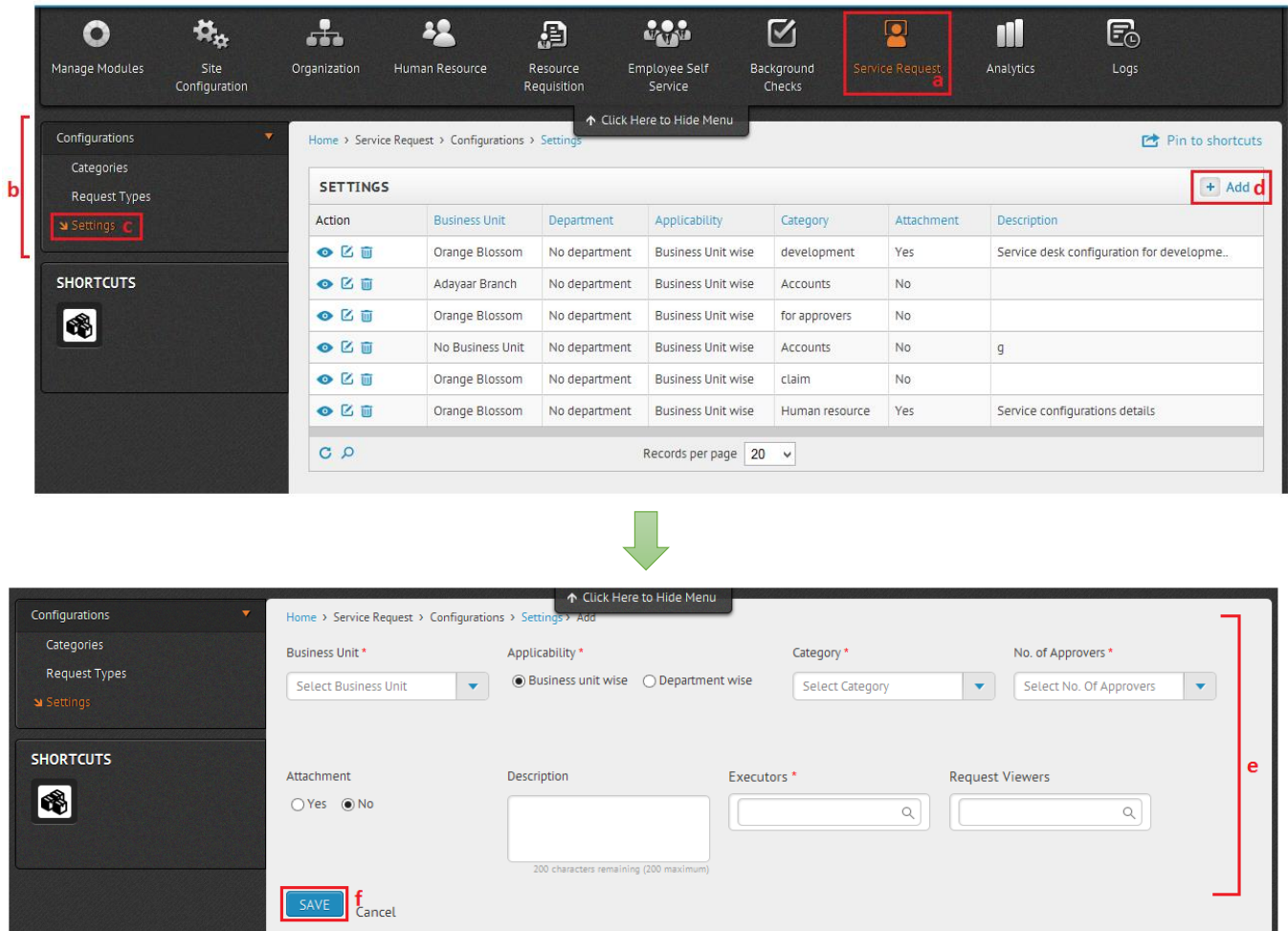For further understanding refer to Figure 56, which explains about adding Settings

Figure 56

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 57

Figure 57

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 58
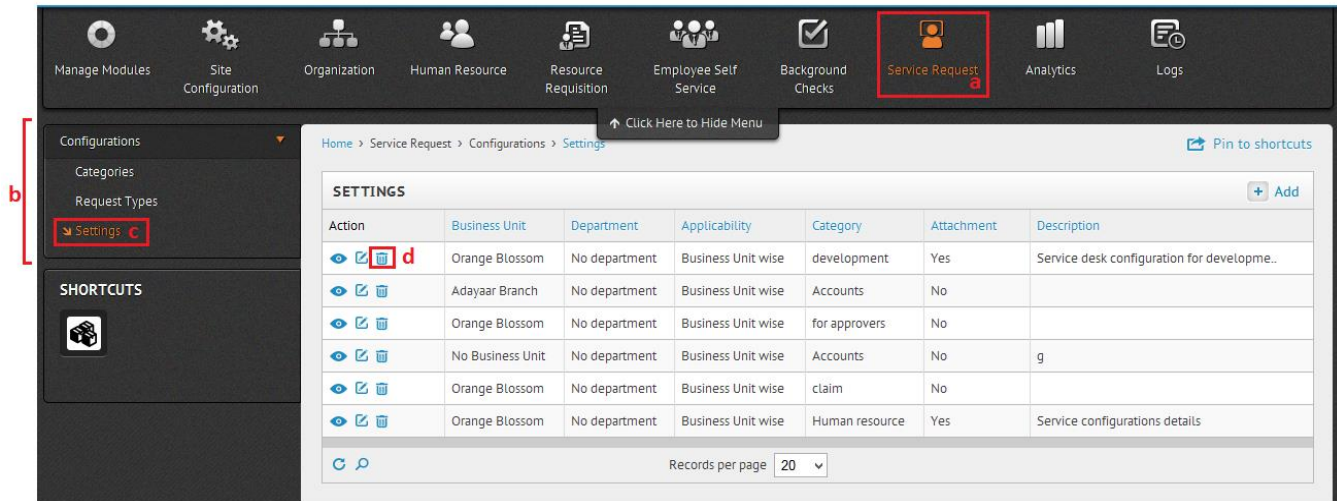
Figure 58

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

Refer to Figure 59
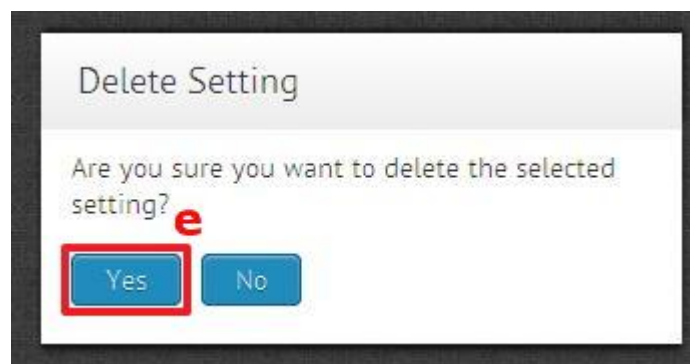
Figure 59

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 60

Cron Job

http://sentrifugo/cronjob/

http://sentrifugo/cronjob/empdocsexpiry

Regards,

Sentrifugo
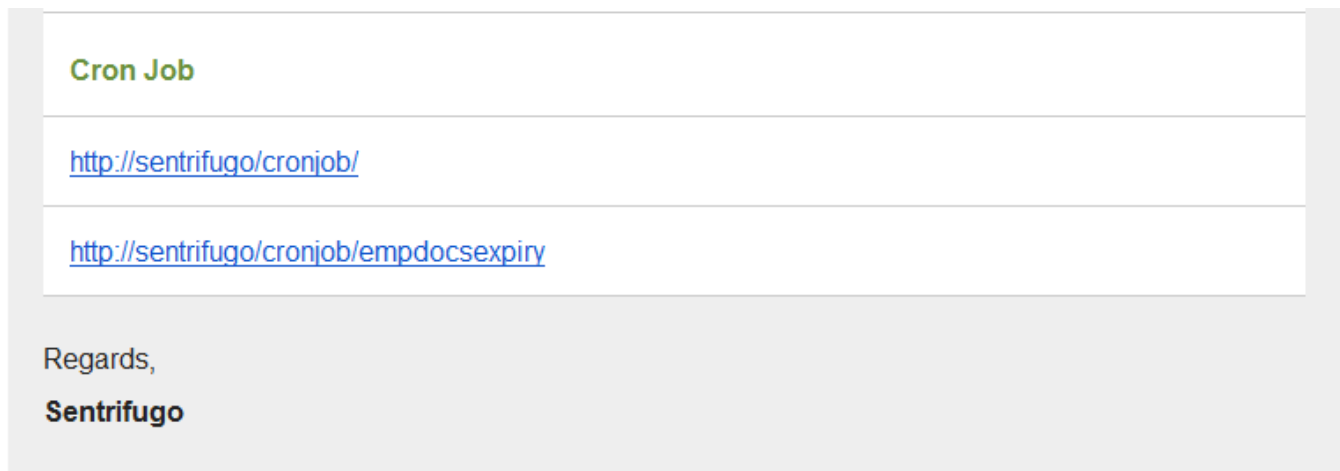
Figure 60

From where do I pick the Import format details

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

Refer to figure 61
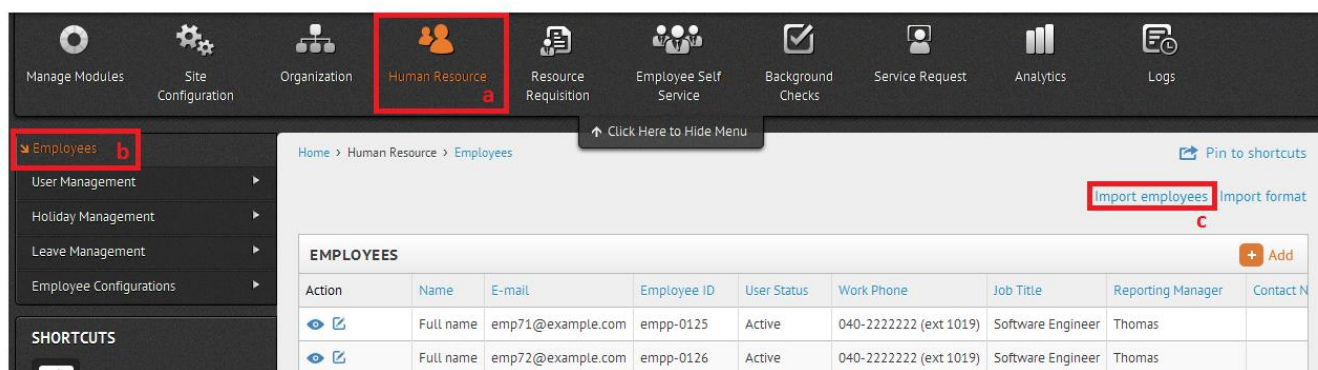
Figure 61

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

Refer Figure 62 for the import format

Figure 62

d. 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 fill in the import excel

Refer Figure 63

Figure 63

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

e. Enter the Full Name of the employee

Refer Figure 64

Figure 64

f. Role
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 fill in the import excel

Refer Figure 65

Figure 65

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

g.   Enter the email of the employee

Refer figure 66

Figure 66

h. 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 fill in the import excel

Refer Figure 67
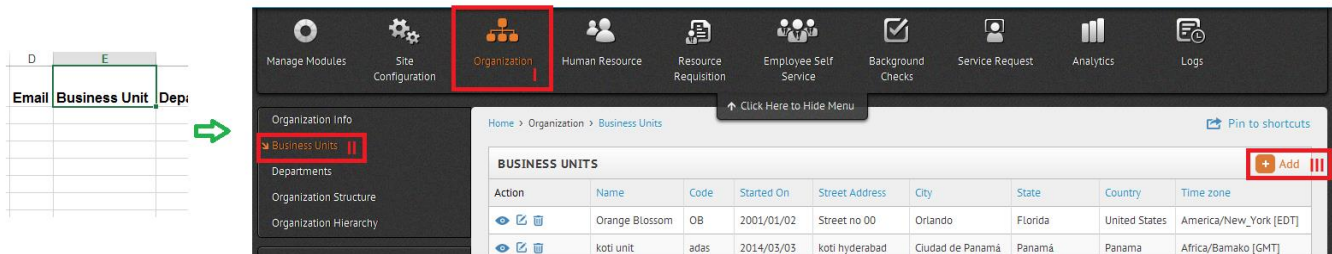
Figure 67

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

i. 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 fill in the import excel

Refer Figure 68

Figure 68

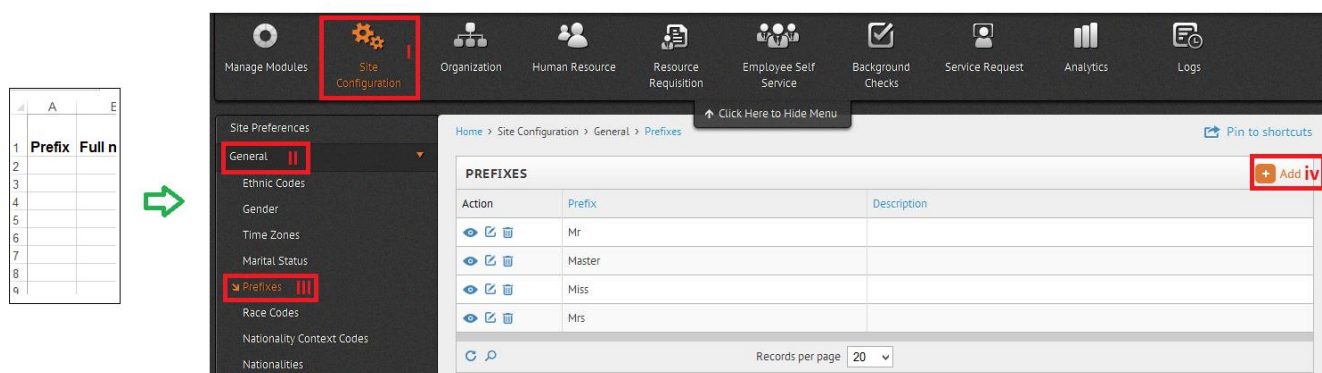Note: You can only enter departments that are existing in the application

j. Enter the name of the Reporting Manager

k. 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 fill in the import excel

Refer Figure 69
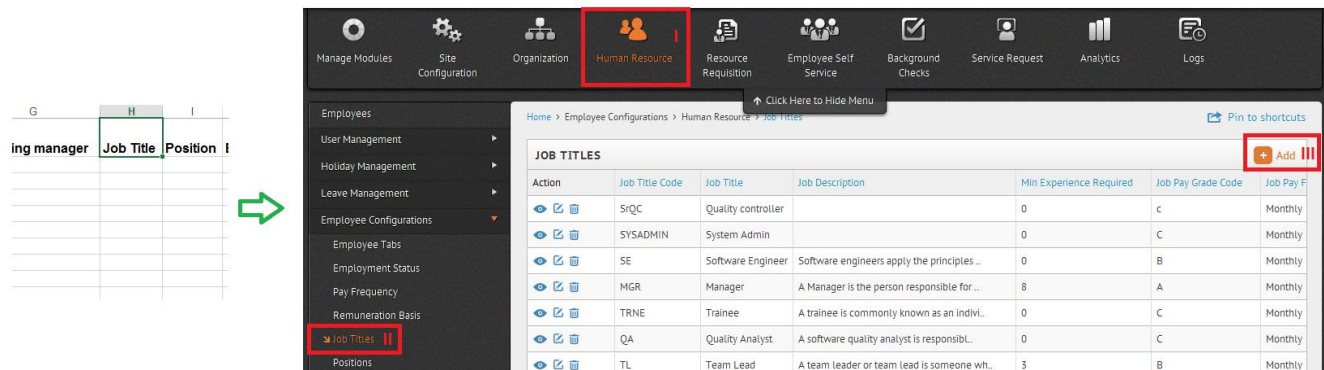
Figure 69

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
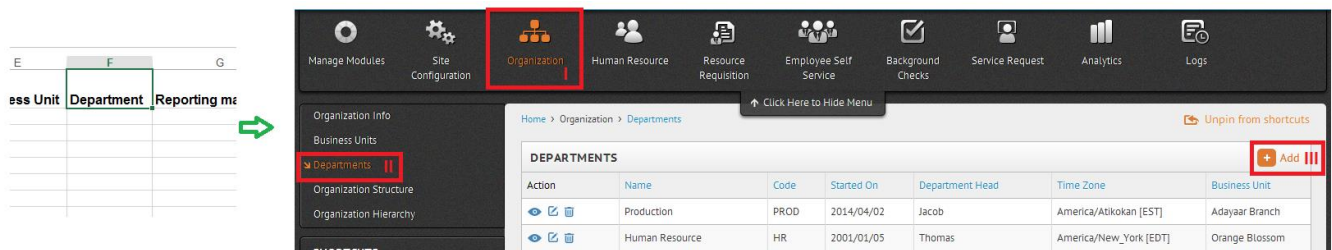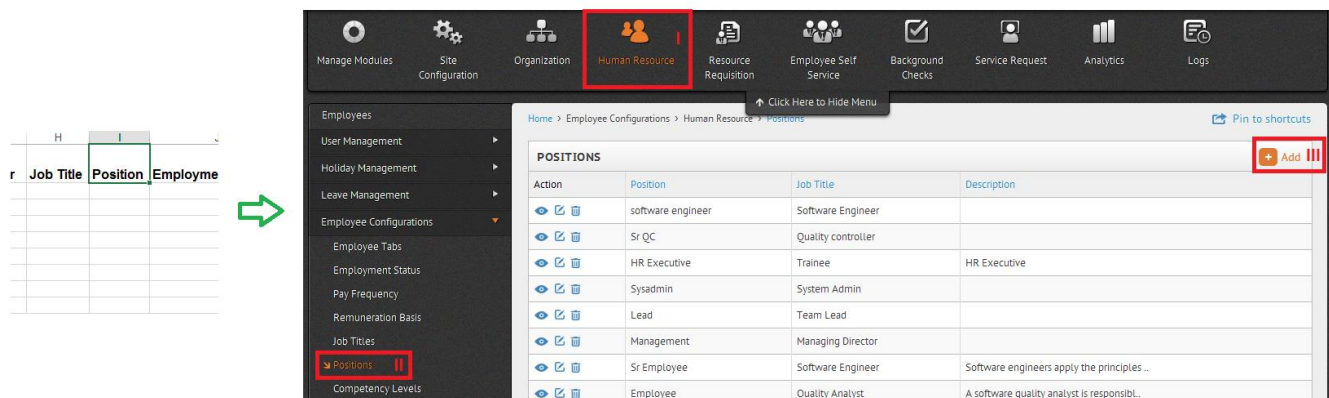V.   Use the positions to fill in the import excel

Refer Figure 70

Figure 70

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

m. 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
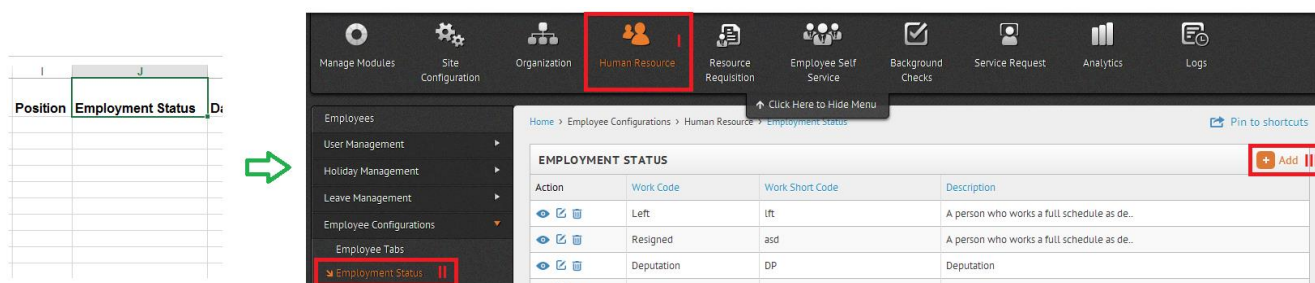   V.   Use the Work Short Code to fill in the import excel

Refer Figure 71

Figure 71

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

n. Enter the employee Date of Joining

Refer Figure 72

Figure 72

o. Enter the employee Date of Leaving

Refer Figure 73

Figure 73

p. Enter the employee Experience

Refer Figure 74

Figure 74

q. Enter the employee Extension

Refer Figure 75

Figure 75

r. Enter the employee Work Telephone Number

Refer Figure 76

Figure 76

s. Enter the employee Fax

Refer Figure 77

Figure 77