

# Sentrifugo

## User Guide

# Table of Content

Getting Started .....	4
How to Set Site Configurations: .....	4
How to Edit Site Configurations: .....	5
Need to Delete Site Configurations:.....	6
To Set Employee Configurations: .....	7
To Edit an Employee Configuration:.....	8
To Delete an Employee Configuration: .....	9
Want to Configure Tabs for Employees: .....	10
Do You Want to Add an Organization: .....	11
How do I Set Site Preferences: .....	15
How to Activate and In-activate Modules: .....	16
Do you want to Add Roles & Privileges:.....	17
How do I Add an External User:.....	19
How do I Add an Employee:.....	20
How can I Update My Details:.....	22
Want to Add Leave Management Options:.....	24
What if I want to Apply a Leave Request:.....	26
How do I Cancel my Leave Request:.....	28
How to Approve or Reject Leave Requests:.....	29
How do I Raise a Resource Requisition: .....	30
Where do I Add Screening Type for Background Checks: .....	32
How do I Add an Agency to Perform Background Checks: .....	33
Can I Send an Employee for Background Checks: .....	35
Want to View & Generate Reports: .....	36
Where can you View Activity log: .....	39
Where can I View User log:.....	39
Looking to Set Shortcuts:.....	40
Looking to Set Widgets: .....	41
Want to Configure Service Request: .....	43
Want to Edit Service Request: .....	44
How to Delete Service Request: .....	45

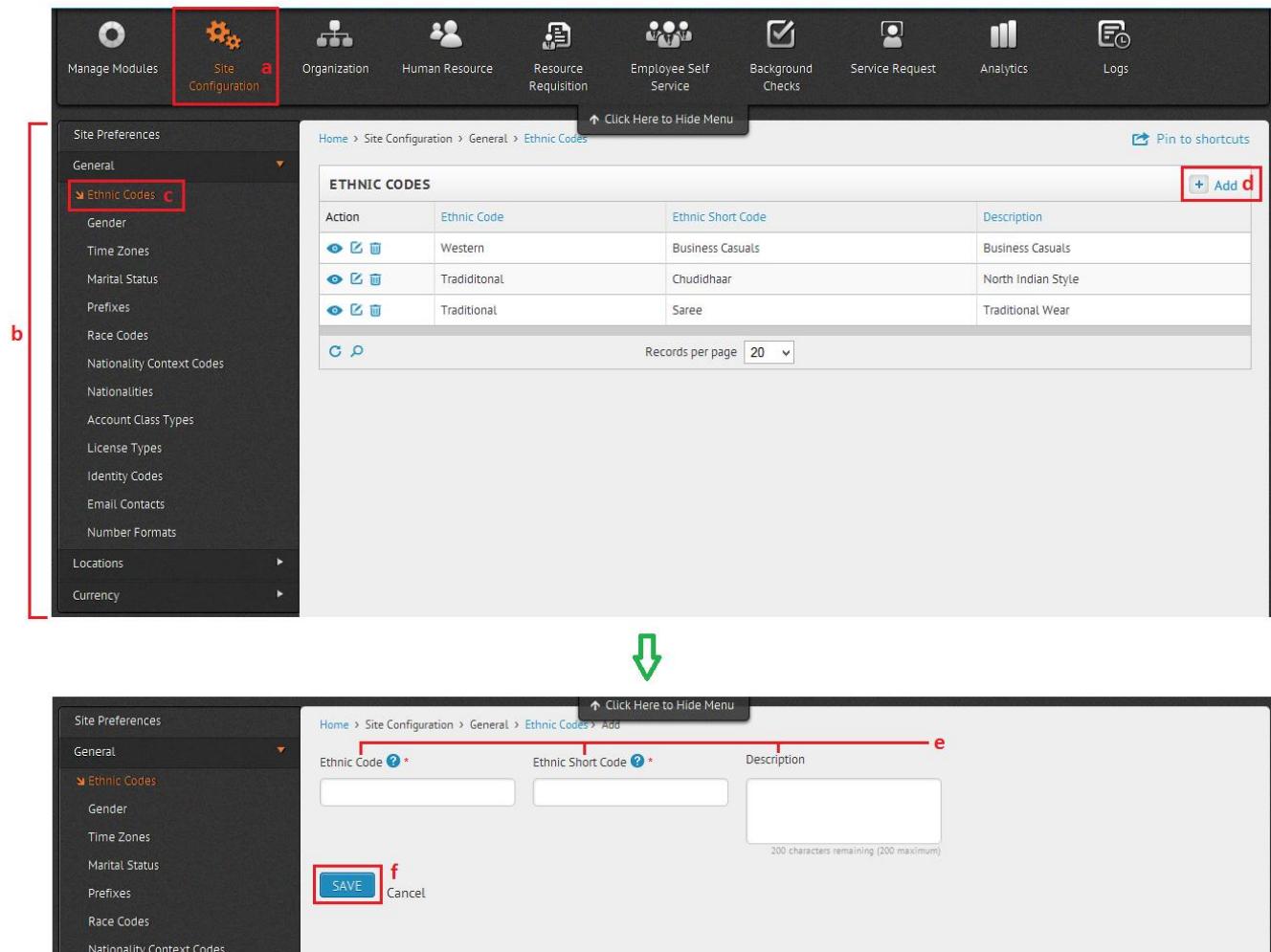
How do I set Cron Jobs:.....	46
How to Download Import format.....	47
From where do I pick the Import format details .....	48

# 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



**Top Screenshot: ETHNIC CODES List Page**

The page title is "ETHNIC CODES". It displays a table with three rows:

Action	Ethnic Code	Ethnic Short Code	Description
	Western	Business Casuals	Business Casuals
	Traditional	Chudidhaar	North Indian Style
	Traditional	Saree	Traditional Wear

Below the table are "C" and "P" icons, and a "Records per page" dropdown set to 20.

**Bottom Screenshot: Add Ethnic Code Form**

The page title is "Add Ethnic Code". The form has three fields:

- Ethnic Code (highlighted with red box "e")
- Ethnic Short Code (highlighted with red box "e")
- Description (highlighted with red box "e")

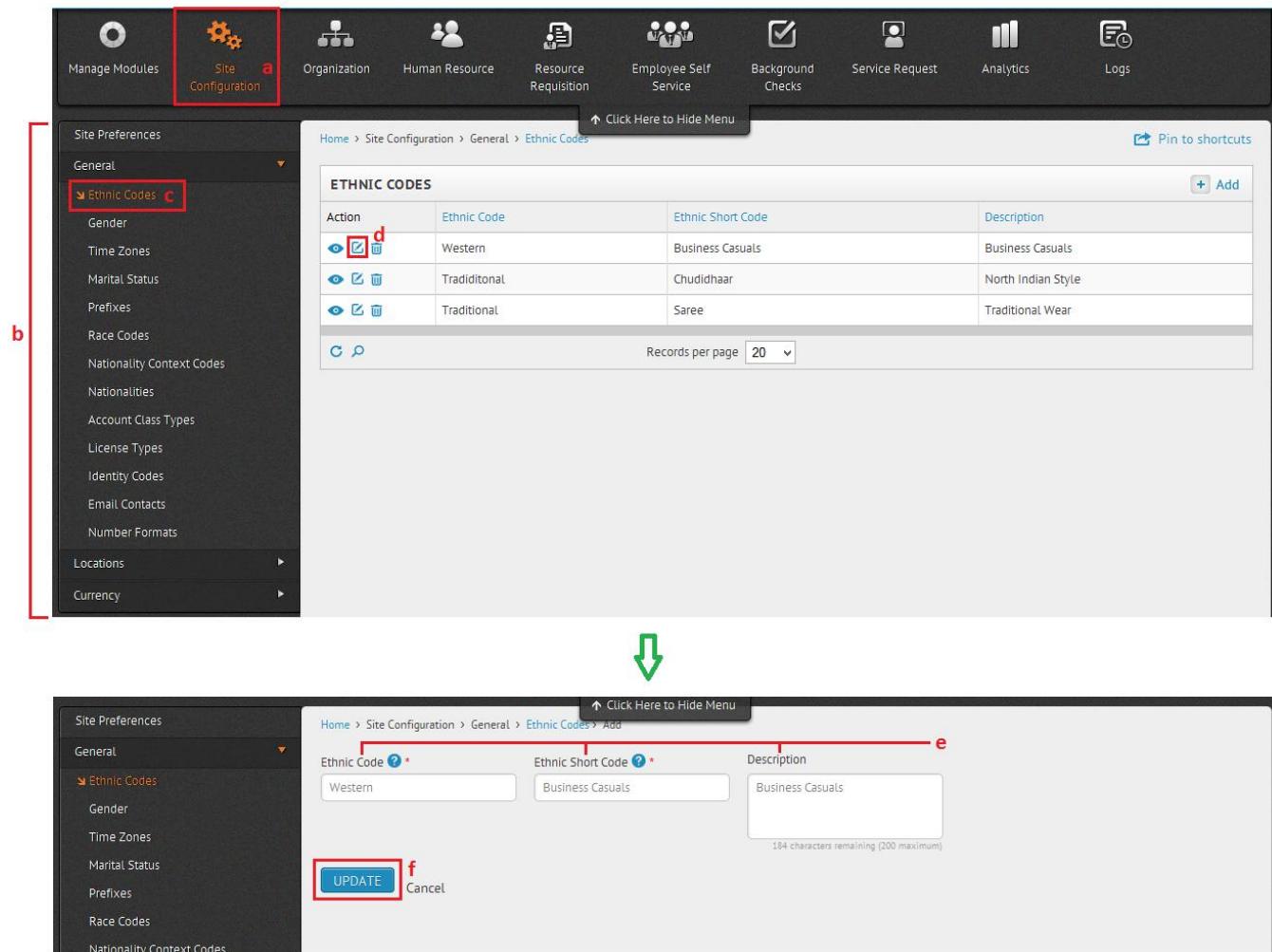
At the bottom are "SAVE" and "Cancel" buttons, with "SAVE" highlighted with a red box "f".

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





**ETHNIC CODES**

Action	Ethnic Code	Ethnic Short Code	Description
	Western	Business Casuals	Business Casuals
	Traditional	Chudidhaar	North Indian Style
	Traditional	Saree	Traditional Wear

Records per page: 20



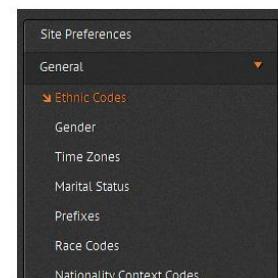
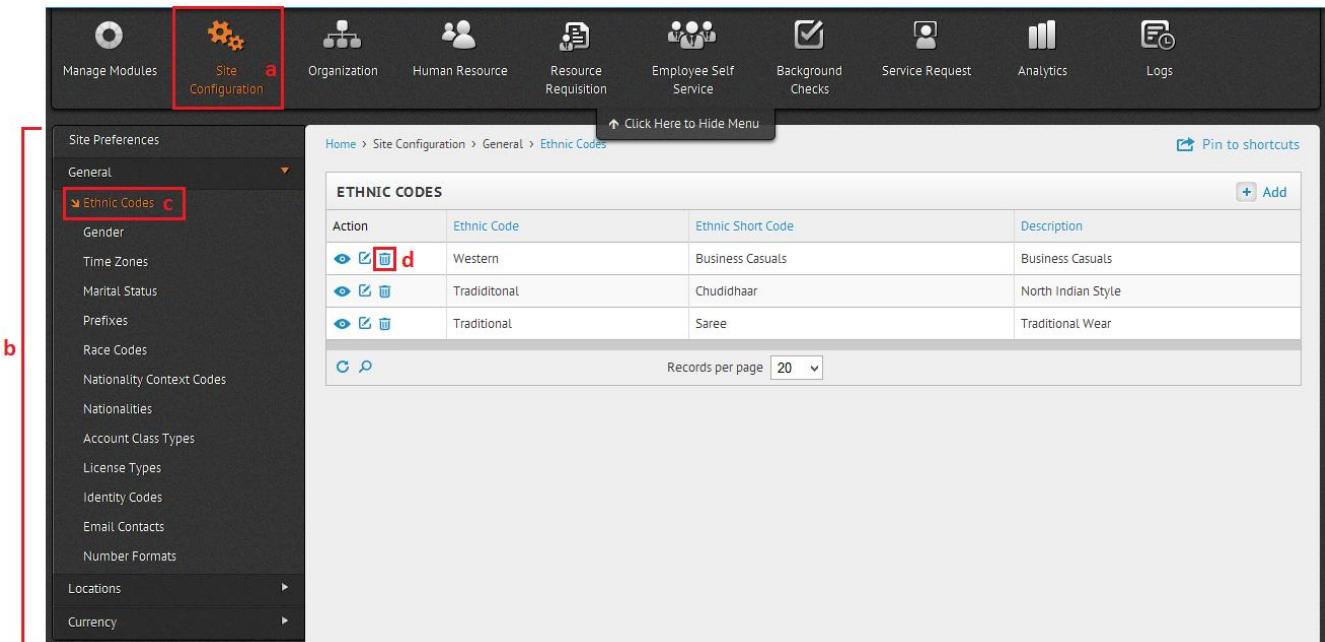


Figure 2

## 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



Action	Ethnic Code	Ethnic Short Code	Description
	Western	Business Casuals	Business Casuals
	Traditional	Chudidhaar	North Indian Style
	Traditional	Saree	Traditional Wear

Figure 3

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

Refer Figure 4

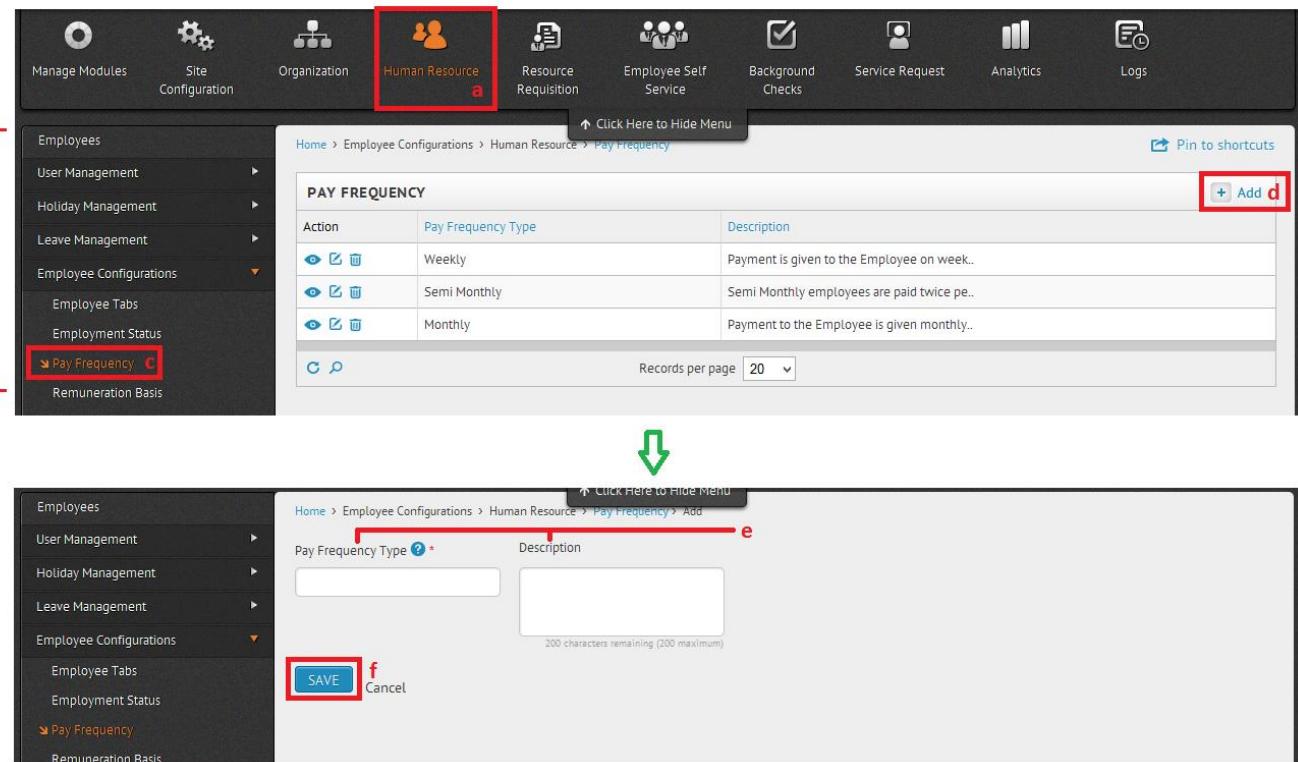


Figure 4

## 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



**PAY FREQUENCY**

Action	Pay Frequency Type	Description
	Weekly	Payment is given to the Employee on week..
	Semi Monthly	Semi Monthly employees are paid twice pe..
	Monthly	Payment to the Employee is given monthly..

Records per page: 20

**Add**

**Employee Configurations > Pay Frequency > Add**

Pay Frequency Type (Required) Description  
   
200 characters remaining (200 maximum)

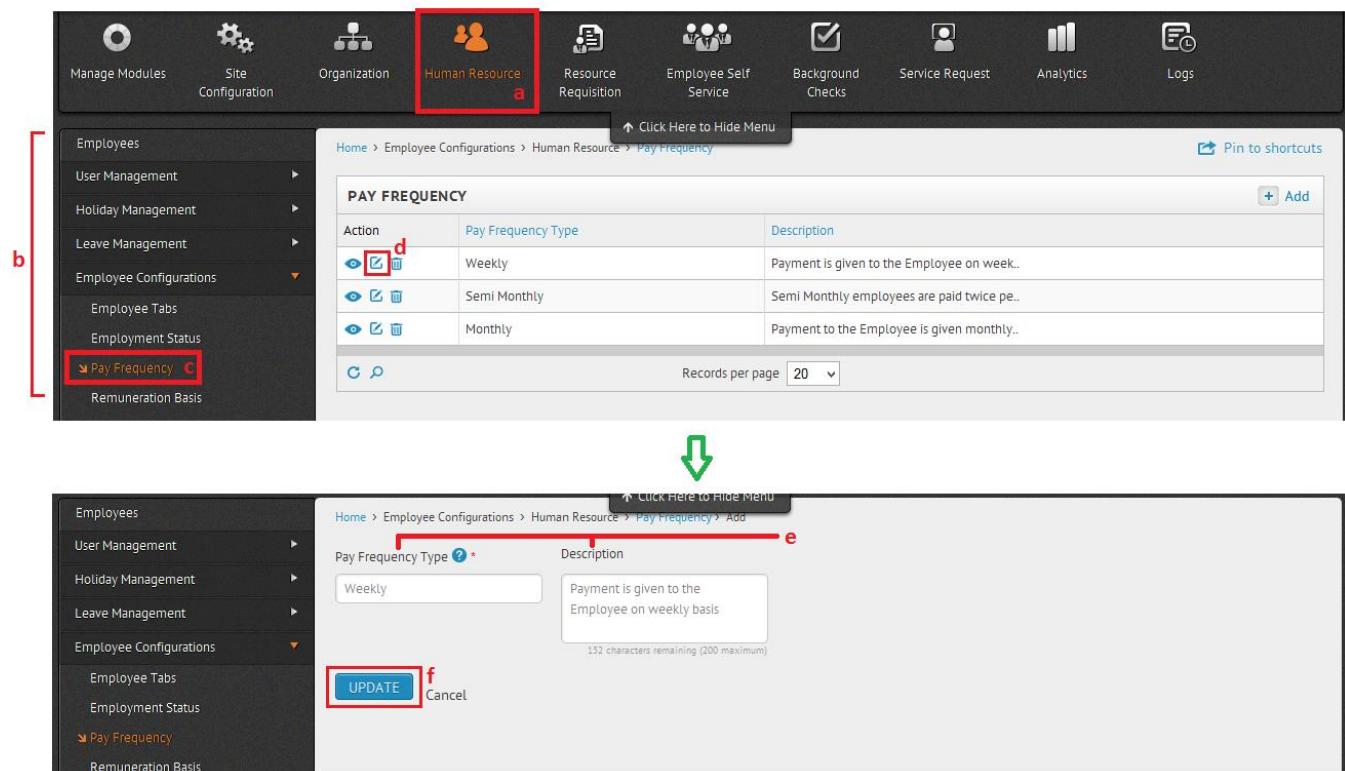
**SAVE** Cancel

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



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

**Screenshot 1 (Top):** This shows the main navigation bar and the left-side menu. The 'Human Resource' icon in the top menu is highlighted with a red box and labeled 'a'. The 'Employee Configurations' item in the left menu is also highlighted with a red box and labeled 'b'. A red box highlights the 'Pay Frequency' link under 'Employee Configurations', which is labeled 'c'. The right panel displays a table titled 'PAY FREQUENCY' with three rows: 'Weekly', 'Semi Monthly', and 'Monthly'. The 'Weekly' row has its edit icon highlighted with a red box and labeled 'd'. A tooltip 'Click Here to Hide Menu' is visible above the menu area.

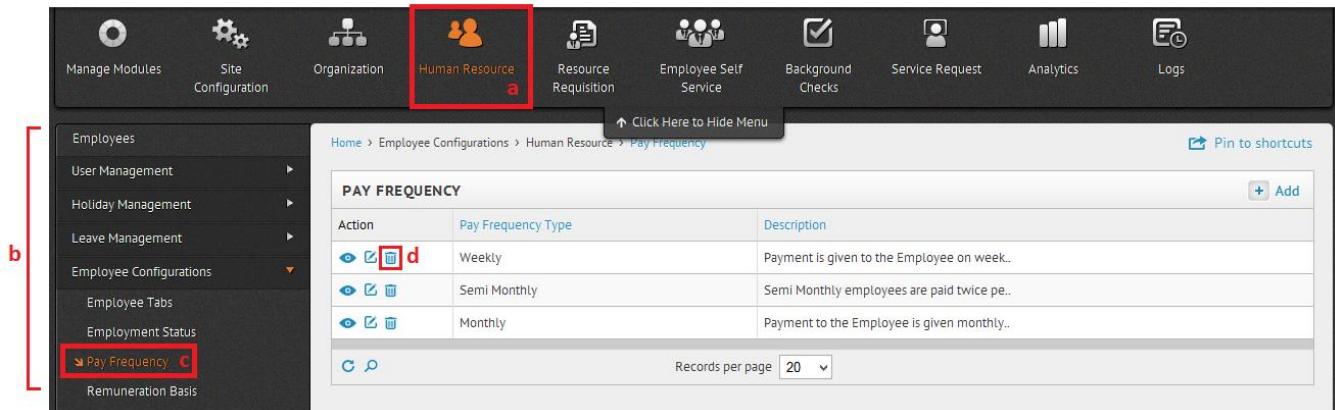
**Screenshot 2 (Bottom):** This shows the 'Pay Frequency' edit screen. The 'Pay Frequency Type' field contains 'Weekly' and is highlighted with a red box and labeled 'e'. The 'Description' field contains 'Payment is given to the Employee on weekly basis' and is also highlighted with a red box and labeled 'e'. Below these fields are 'UPDATE' and 'Cancel' buttons. The 'UPDATE' button is highlighted with a red box and labeled 'f'.

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



Action	Pay Frequency Type	Description
	Weekly	Payment is given to the Employee on week..
	Semi Monthly	Semi Monthly employees are paid twice pe..
	Monthly	Payment to the Employee is given monthly..

Figure 7

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

Refer Figure 8

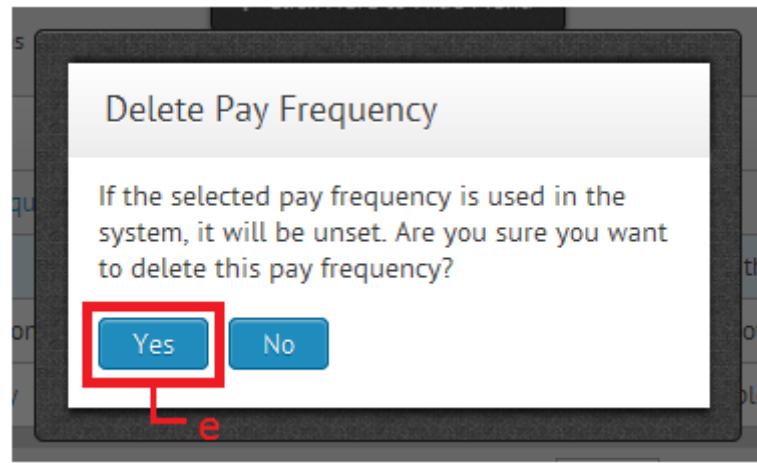
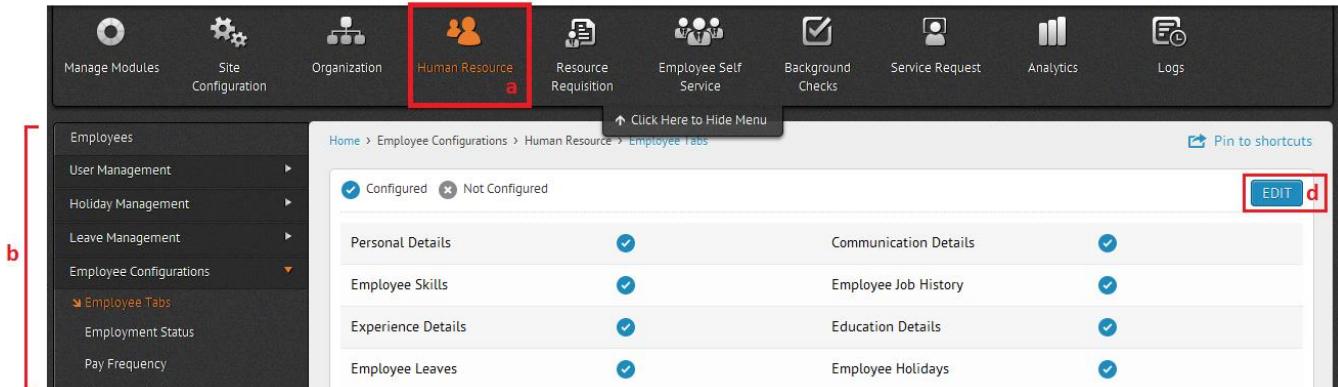


Figure 8

## 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

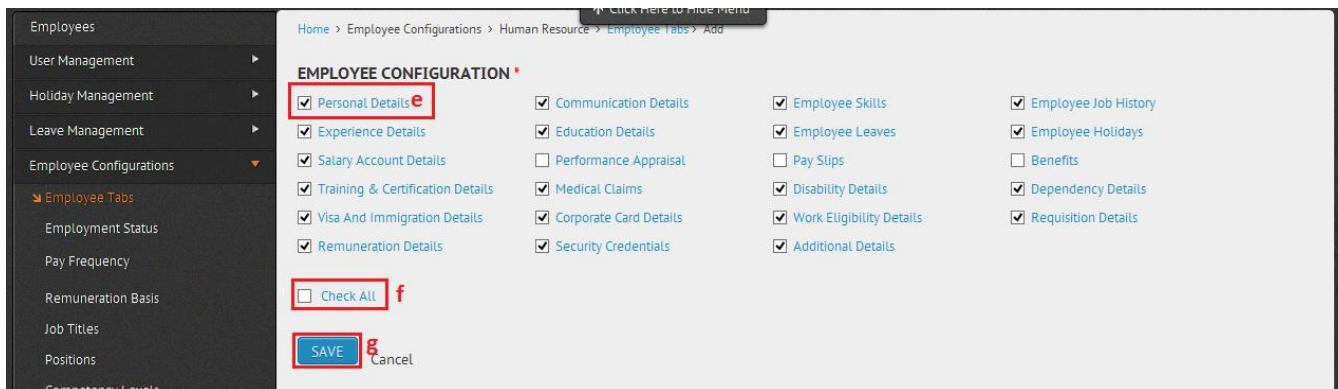


The screenshot shows the Sentrifugo web application. At the top, there is a navigation bar with various icons and links: Manage Modules, Site Configuration, Organization, Human Resource (highlighted with a red box and labeled 'a'), Resource Requisition, Employee Self Service, Background Checks, Service Request, Analytics, and Logs. Below the navigation bar is a left sidebar with a vertical list of menu items: Employees, User Management, Holiday Management, Leave Management, Employee Configurations (with a dropdown arrow), Employee Tabs (highlighted with a red box and labeled 'c'), Employment Status, Pay Frequency, and Payroll. A red bracket on the left side of the sidebar points to the 'Employee Configurations' item, labeled 'b'. The main content area shows a breadcrumb path: Home > Employee Configurations > Human Resource > Employee Tabs. It displays a table titled 'Employee Tabs' with two columns: 'Personal Details', 'Communication Details', 'Employee Skills', 'Employee Job History', 'Experience Details', 'Education Details', 'Employee Leaves', and 'Employee Holidays'. Each row has a checkbox next to it. A 'Configured' button is at the top left of the table, and an 'Edit' button is at the top right, both highlighted with a red box and labeled 'd'. A tooltip 'Click Here to Hide Menu' is visible above the sidebar.

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



The screenshot shows the 'EMPLOYEE CONFIGURATION' dialog box. On the left, there is a sidebar with the same menu structure as Figure 9: Employees, User Management, Holiday Management, Leave Management, Employee Configurations (with a dropdown arrow), Employee Tabs (highlighted with a red box and labeled 'e'), Employment Status, Pay Frequency, Remuneration Basis, Job Titles, Positions, and Competency Levels. The main content area is titled 'EMPLOYEE CONFIGURATION \*'. It contains a grid of checkboxes grouped into four columns. The first column includes Personal Details (checked), Experience Details (checked), Salary Account Details (checked), Training & Certification Details (checked), Visa And Immigration Details (checked), and Remuneration Details (checked). The second column includes Communication Details (checked), Education Details (checked), Performance Appraisal (unchecked), Medical Claims (checked), Corporate Card Details (checked), and Security Credentials (checked). The third column includes Employee Skills (checked), Employee Leaves (checked), Pay Slips (unchecked), Disability Details (checked), Work Eligibility Details (checked), and Additional Details (checked). The fourth column includes Employee Job History (checked), Employee Holidays (checked), Benefits (unchecked), Dependency Details (checked), Requisition Details (checked), and Additional Details (checked). Below the grid are two buttons: 'Check All' (unchecked) and 'SAVE' (highlighted with a red box and labeled 'g'). There is also a 'Cancel' button. A tooltip 'Click Here to Hide Menu' is visible above the sidebar.

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

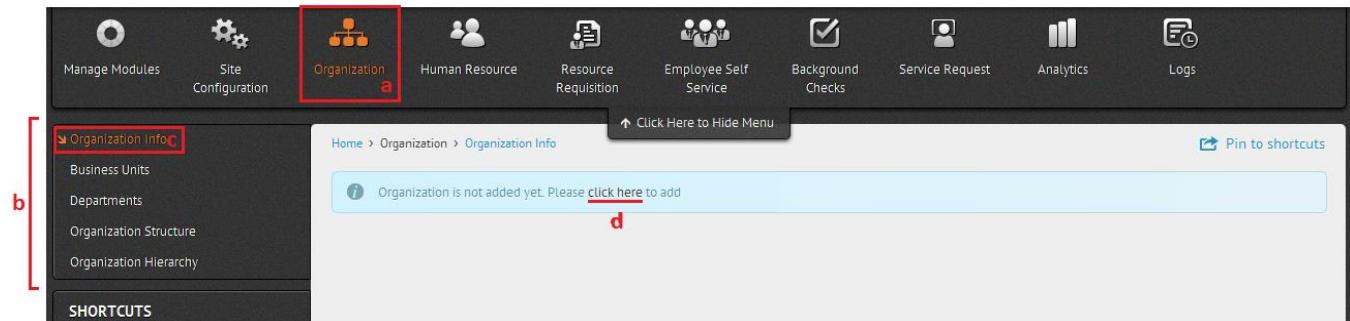
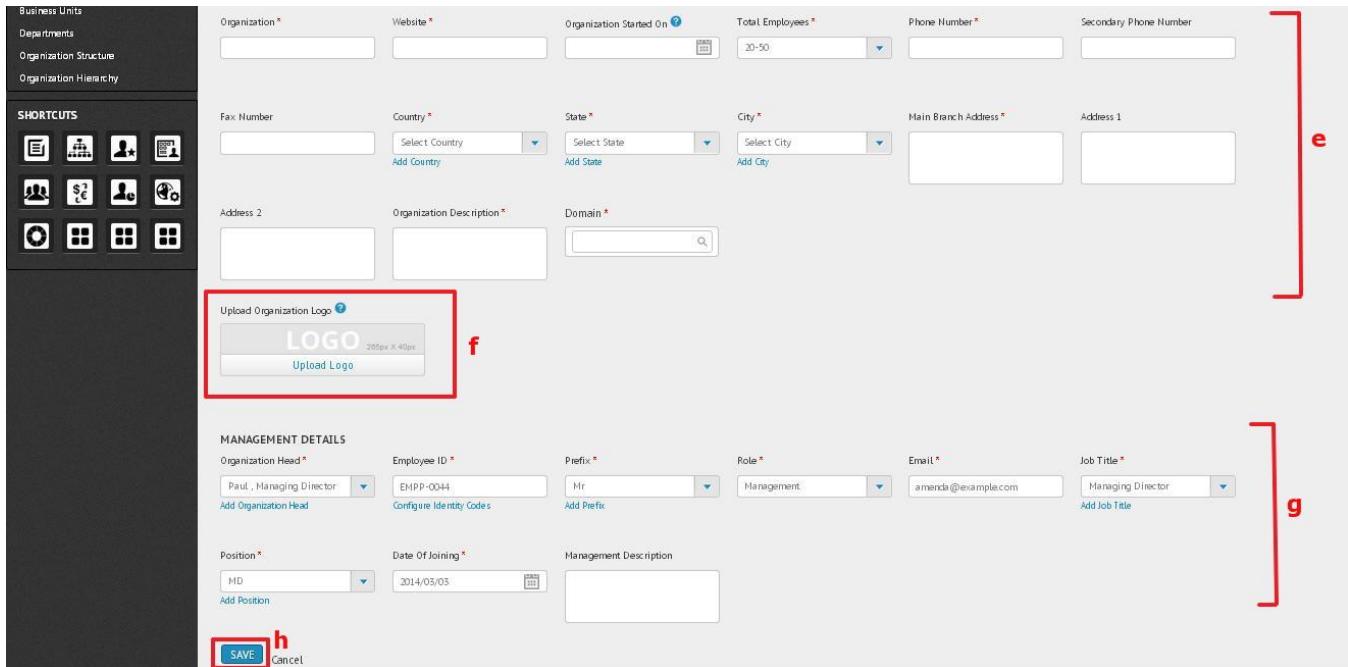


Figure 11

- 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



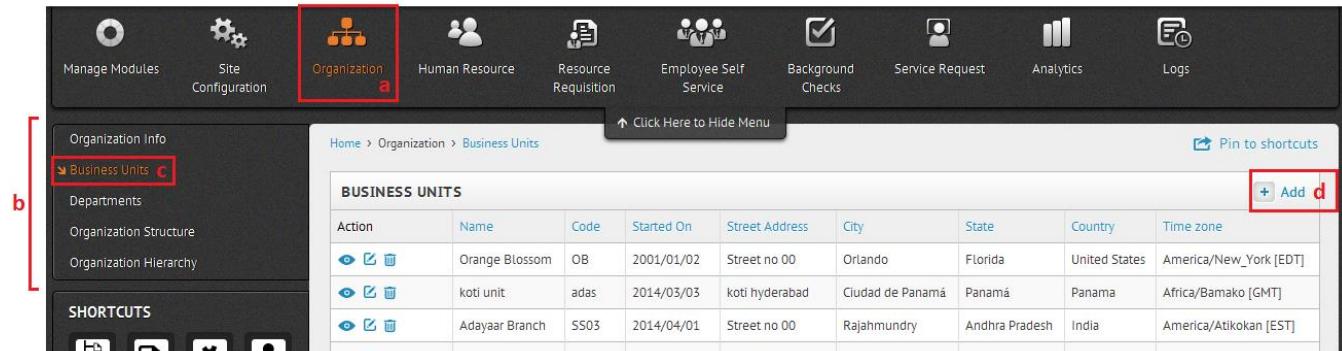
The screenshot shows the 'Organization' setup page in the Sentrifugo interface. On the left, there's a sidebar with links like Business Units, Departments, Organization Structure, and Organization Hierarchy. Below that is a 'SHORTCUTS' section with various icons. The main form area has several input fields: Organization, Website, Organization Started On (with a calendar icon), Total Employees (dropdown: 20-50), Phone Number, Secondary Phone Number, Fax Number, Country (dropdown: Select Country, Add Country), State (dropdown: Select State, Add State), City (dropdown: Select City, Add City), Main Branch Address, Address 1, Address 2, Organization Description, Domain, and a file upload field for 'Upload Organization Logo' (256px x 40px) with a 'Upload Logo' button. A red box labeled 'f' highlights the logo upload section. A large red bracket on the right side, labeled 'e', covers the top half of the form. Another red bracket, labeled 'g', covers the 'Management Details' section at the bottom. At the very bottom of the form are 'SAVE' and 'Cancel' buttons, with a red box labeled 'h' highlighting the 'SAVE' button.

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



Action	Name	Code	Started On	Street Address	City	State	Country	Time zone
	Orange Blossom	OB	2001/01/02	Street no 00	Orlando	Florida	United States	America/New_York [EDT]
	koti unit	adas	2014/03/03	koti hyderabad	Ciudad de Panamá	Panama	Panama	Africa/Bamako [GMT]
	Adayaar Branch	SS03	2014/04/01	Street no 00	Rajahmundry	Andhra Pradesh	India	America/Atikokan [EST]

Figure 13

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

Refer Figure 14

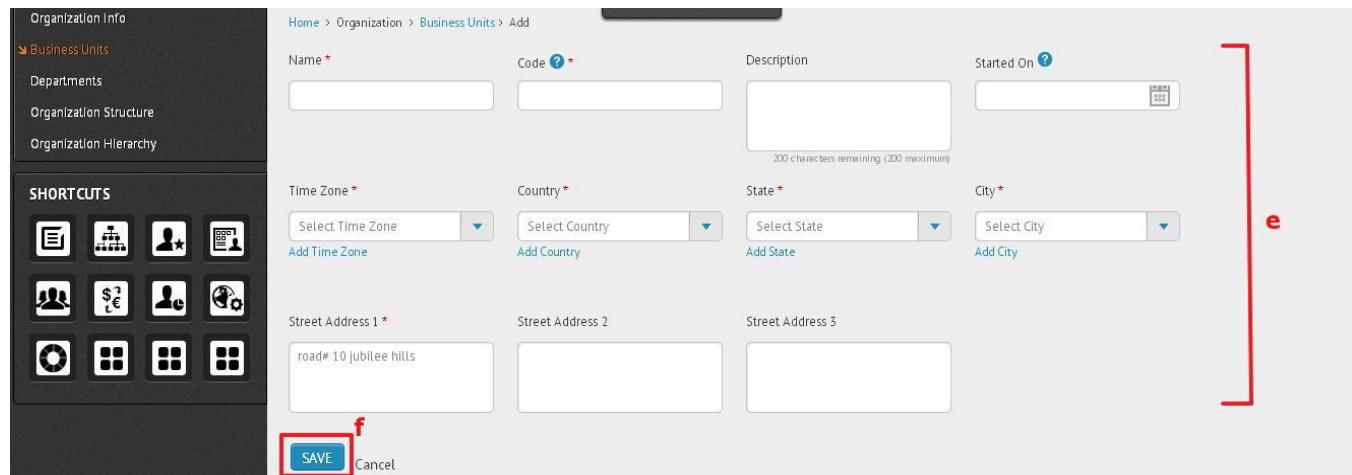
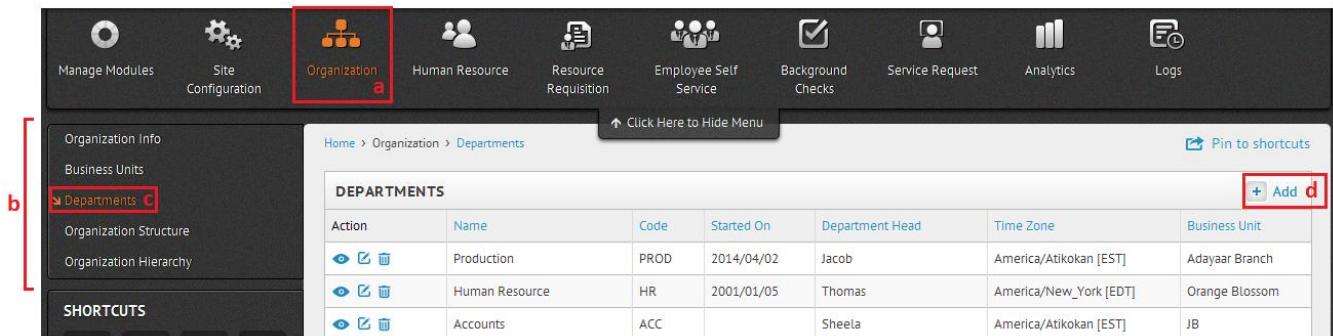


Figure 14

## 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

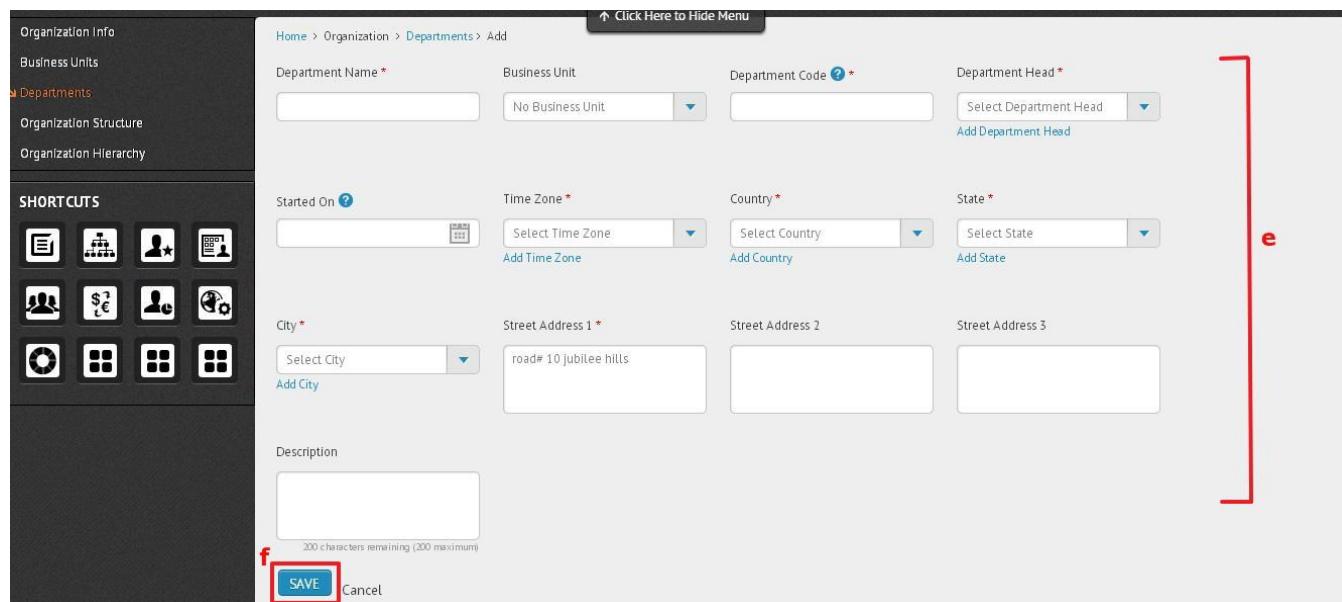


Action	Name	Code	Started On	Department Head	Time Zone	Business Unit
	Production	PROD	2014/04/02	Jacob	America/Atikokan [EST]	Adyaar Branch
	Human Resource	HR	2001/01/05	Thomas	America/New_York [EDT]	Orange Blossom
	Accounts	ACC		Sheela	America/Atikokan [EST]	JB

Figure 15

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

Refer Figure 16



Department Name \*      Business Unit      Department Code ? \*      Department Head \*

Started On ?      Time Zone \*      Country \*      State \*

City \*      Street Address 1 \*      Street Address 2      Street Address 3

Description

200 characters remaining (200 maximum)

**SAVE** Cancel

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

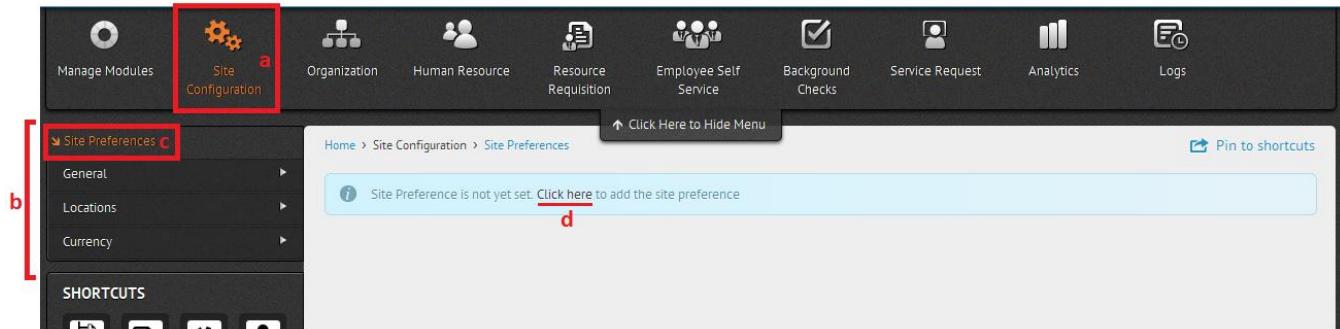


Figure 17

- 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-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 19

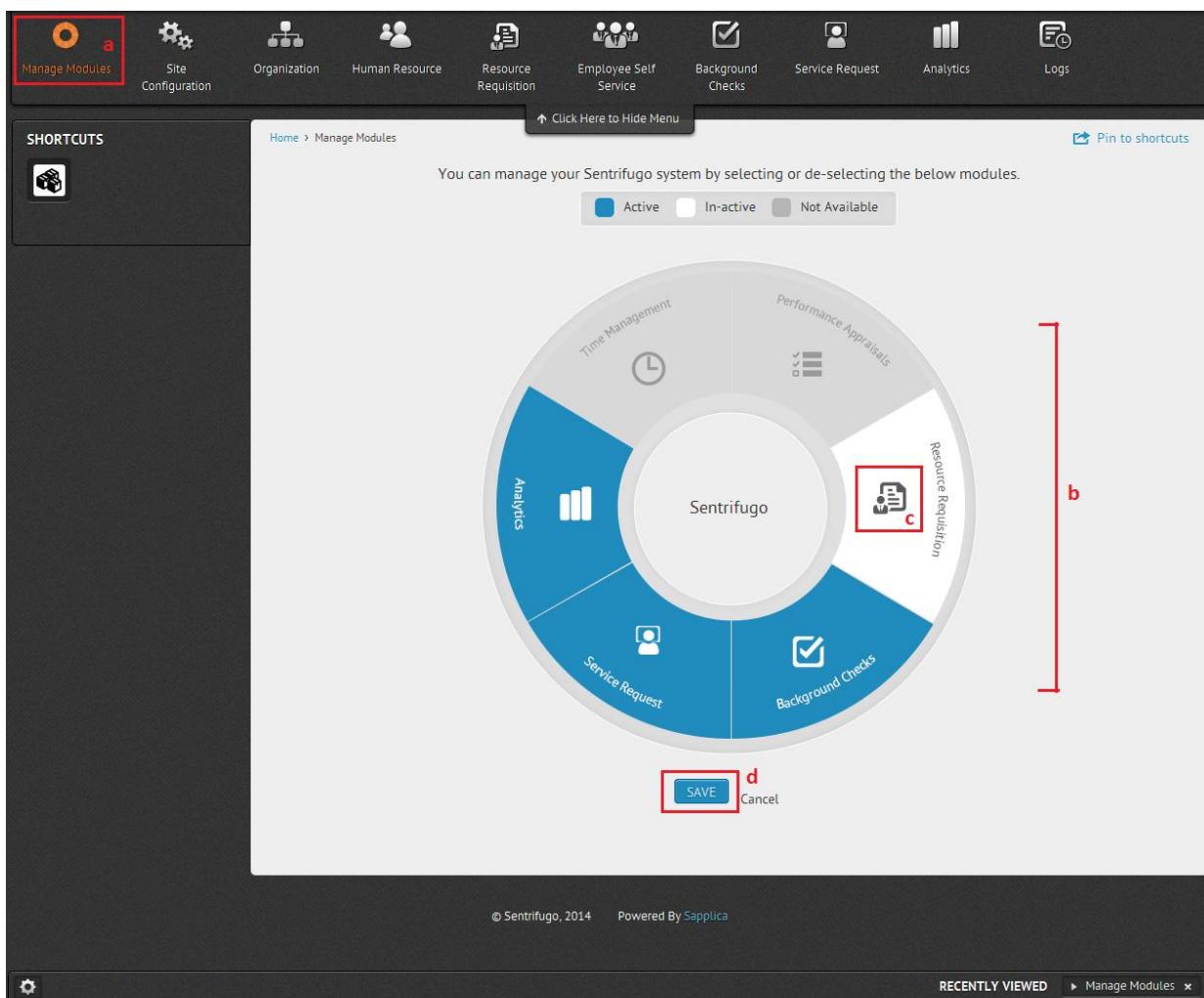
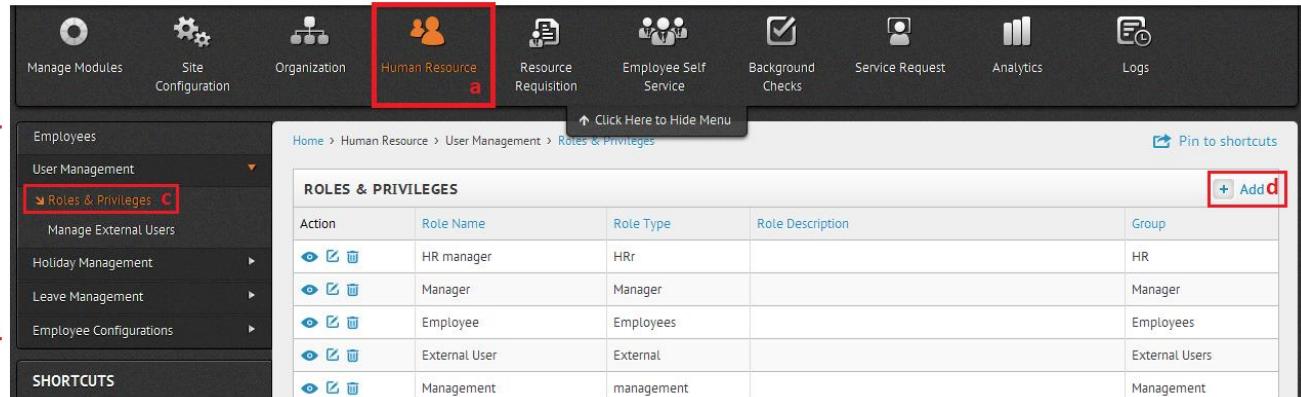


Figure 19

## 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



The screenshot shows the Sentrifugo HRMS interface. At the top, there is a navigation bar with various icons and links: Manage Modules, Site Configuration, Organization, Human Resource (which is highlighted with a red box and labeled 'a'), Resource Requisition, Employee Self Service, Background Checks, Service Request, Analytics, and Logs.

The left sidebar has a tree view with the following structure:

- Employees
- User Management
  - Roles & Privileges** (highlighted with a red box and labeled 'c')
  - Manage External Users
  - Holiday Management
  - Leave Management
  - Employee Configurations
- SHORTCUTS

A red bracket labeled 'b' points to the 'User Management' section in the sidebar. A red box labeled 'c' points to the 'Roles & Privileges' item in the 'User Management' submenu.

The main content area is titled 'ROLES & PRIVILEGES'. It contains a table with the following data:

Action	Role Name	Role Type	Role Description	Group
	HR manager	HR		HR
	Manager	Manager		Manager
	Employee	Employees		Employees
	External User	External		External Users
	Management	management		Management

A red box labeled 'd' points to the '+ Add' button in the top right corner of the table header.

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

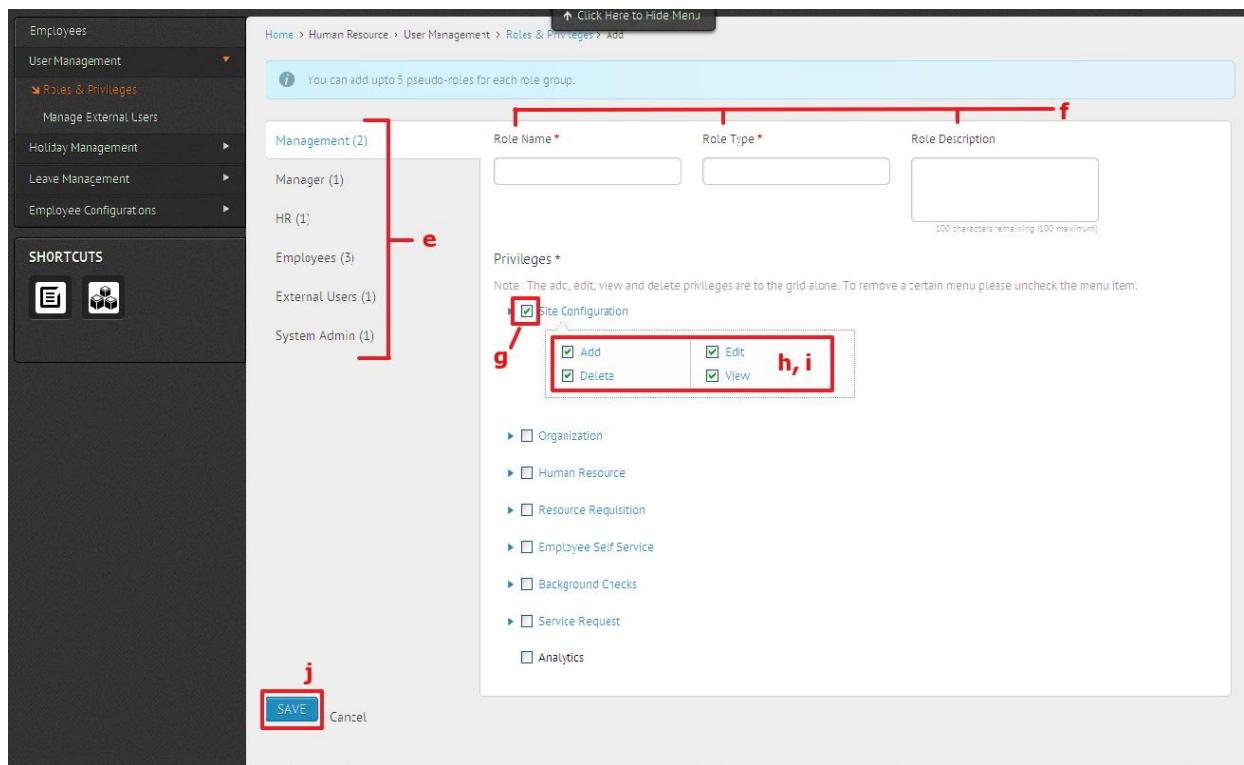
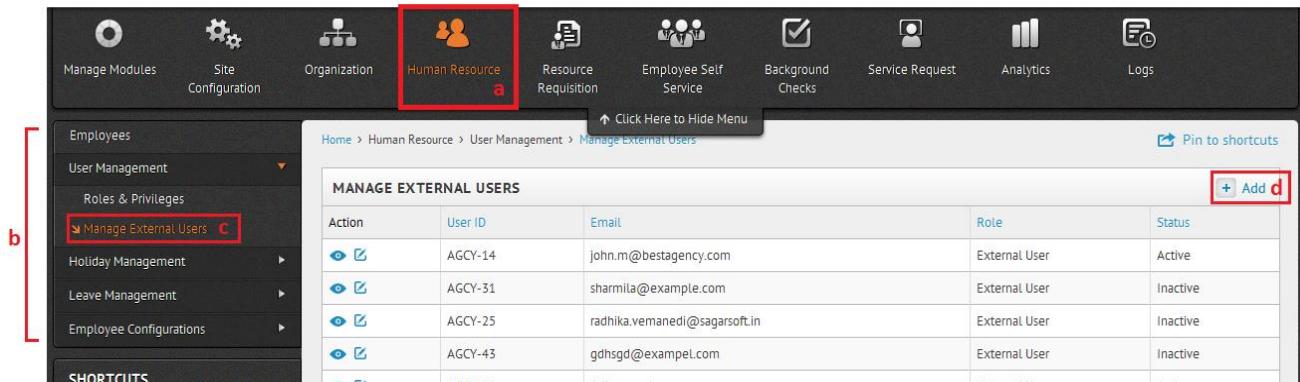


Figure 21

## 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



Action	User ID	Email	Role	Status
	AGCY-14	john.m@bestagency.com	External User	Active
	AGCY-31	sharmila@example.com	External User	Inactive
	AGCY-25	radhika.vemanedi@sagarsoft.in	External User	Inactive
	AGCY-43	gdhsgd@example.com	External User	Inactive

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

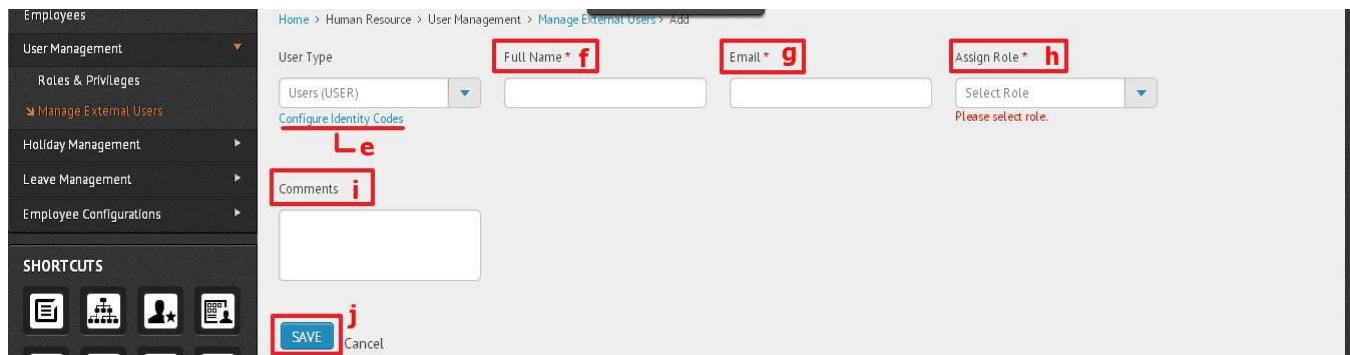
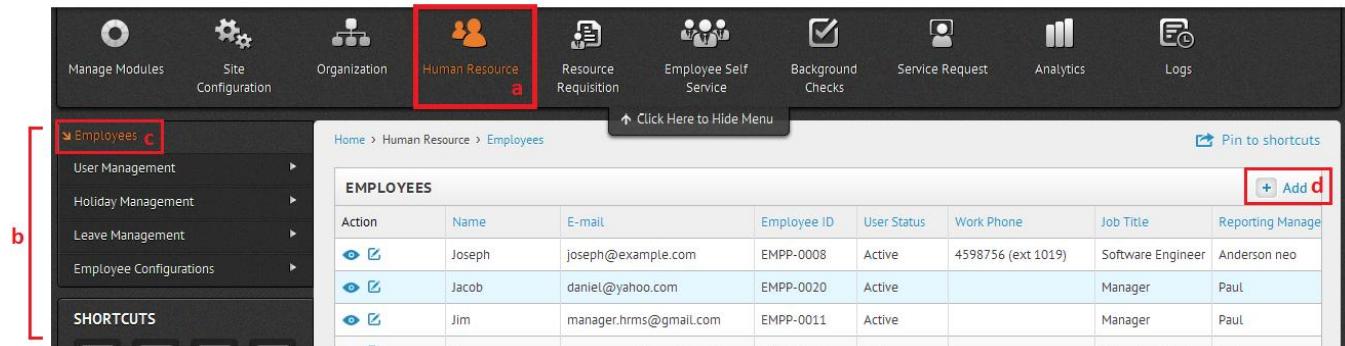


Figure 23

## 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



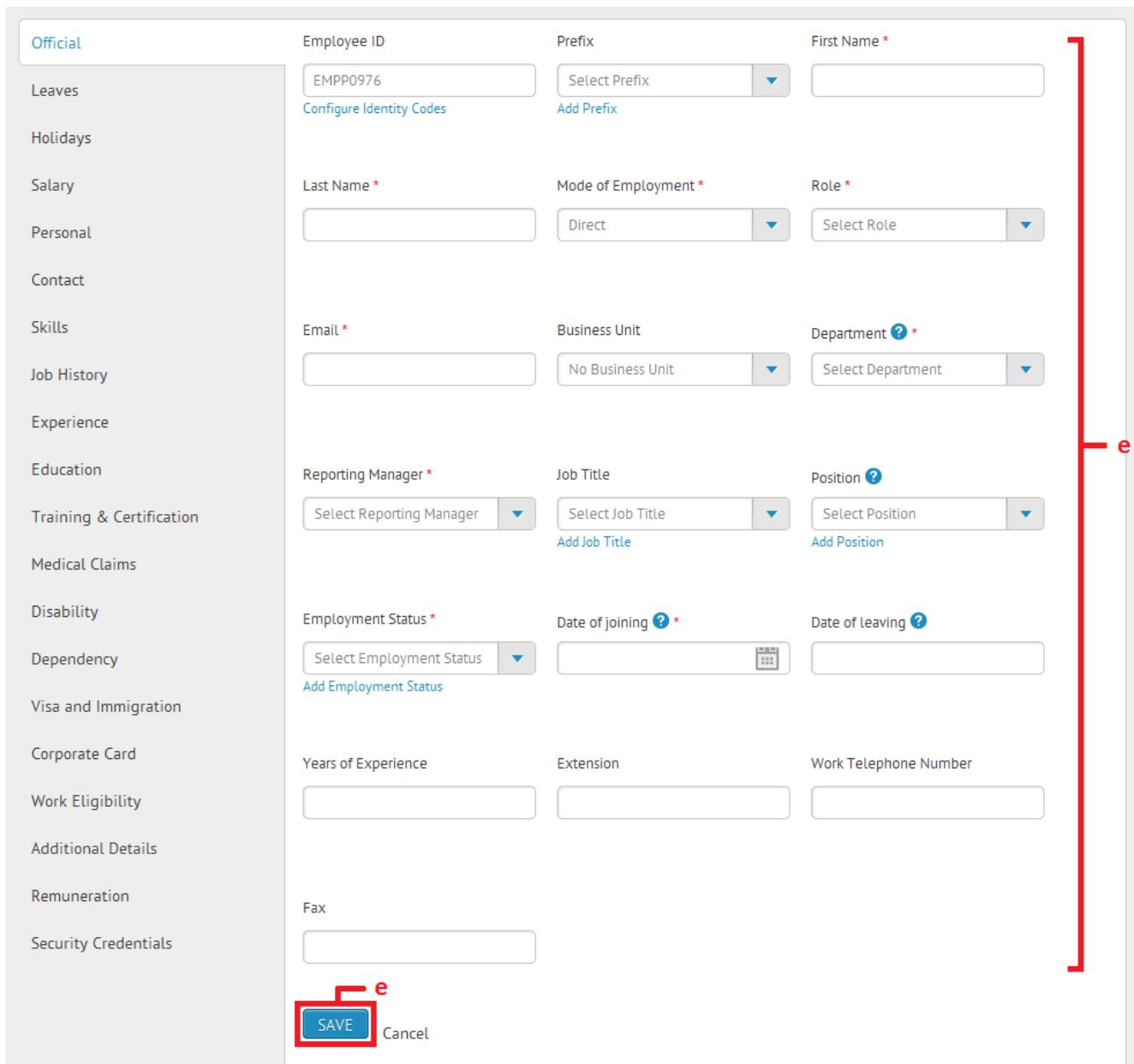
The screenshot shows the Sentrifugo HRMS application interface. At the top, there is a navigation bar with various icons and links: Manage Modules, Site Configuration, Organization, Human Resource (highlighted with a red box and labeled 'a'), Resource Requisition, Employee Self Service, Background Checks, Service Request, Analytics, and Logs. Below the navigation bar is a left-side sidebar with a red bracket labeled 'b' pointing to it. The sidebar contains a 'Employees' section (highlighted with a red box and labeled 'c') which includes 'User Management', 'Holiday Management', 'Leave Management', and 'Employee Configurations'. It also has a 'SHORTCUTS' section. In the center, there is a main content area titled 'EMPLOYEES' with a table listing three employees: Joseph, Jacob, and Jim. The table columns include Action, Name, E-mail, Employee ID, User Status, Work Phone, Job Title, and Reporting Manager. A red box labeled 'd' highlights the 'Add' button in the top right corner of the employee list table.

Action	Name	E-mail	Employee ID	User Status	Work Phone	Job Title	Reporting Manager
	Joseph	joseph@example.com	EMPP-0008	Active	4598756 (ext 1019)	Software Engineer	Anderson neo
	Jacob	daniel@yahoo.com	EMPP-0020	Active		Manager	Paul
	Jim	manager.hrms@gmail.com	EMPP-0011	Active		Manager	Paul

Figure 24

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

Refer Figure 25



**Official**

Leaves	Employee ID EMPP0976	Prefix Select Prefix	First Name * [Empty]
Holidays	Configure Identity Codes		
Salary	Last Name *	Mode of Employment *	Role *
Personal	[Empty]	Direct	Select Role
Contact			
Skills	Email *	Business Unit No Business Unit	Department ? *
Job History	[Empty]	[Empty]	Select Department
Experience			
Education	Reporting Manager *	Job Title Select Job Title	Position ? Select Position
Training & Certification	Select Reporting Manager	Add Job Title	Add Position
Medical Claims			
Disability	Employment Status *	Date of joining ? *	Date of leaving ?
Dependency	Select Employment Status	[Empty]	[Empty]
Visa and Immigration	Add Employment Status		
Corporate Card	Years of Experience	Extension	Work Telephone Number
Work Eligibility	[Empty]	[Empty]	[Empty]
Additional Details			
Remuneration	Fax	[Empty]	
Security Credentials			

**Buttons:**

- SAVE (highlighted with a red box)
- Cancel

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

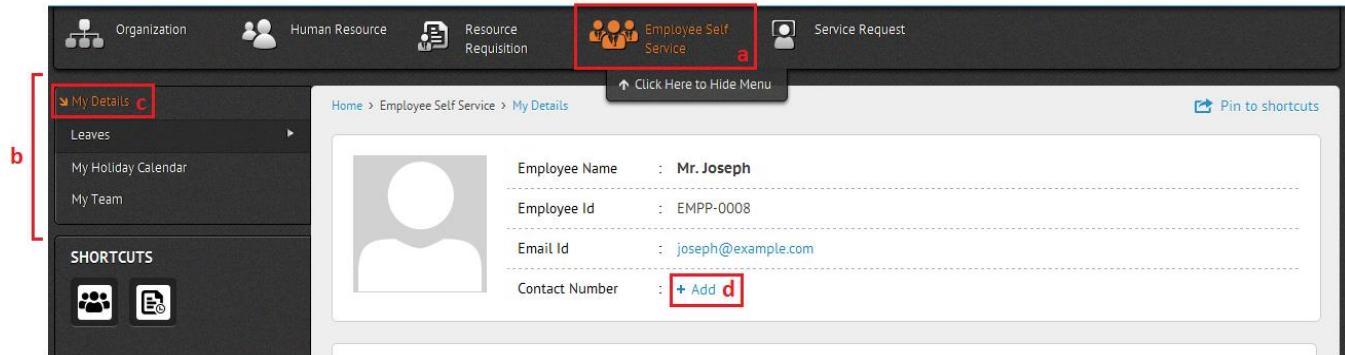


Figure 26

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

Refer Figure 27

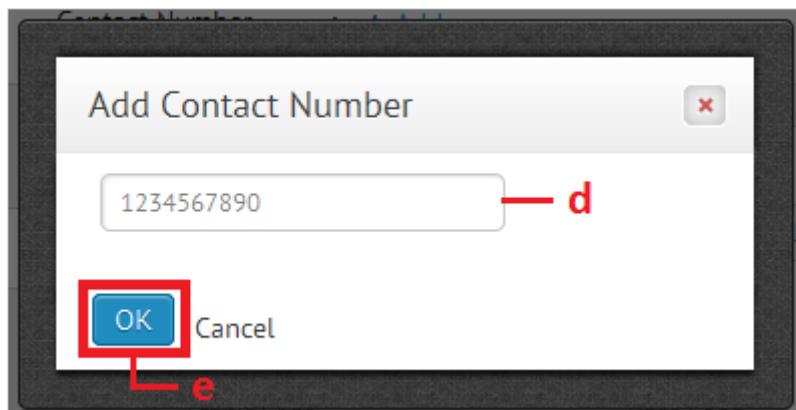
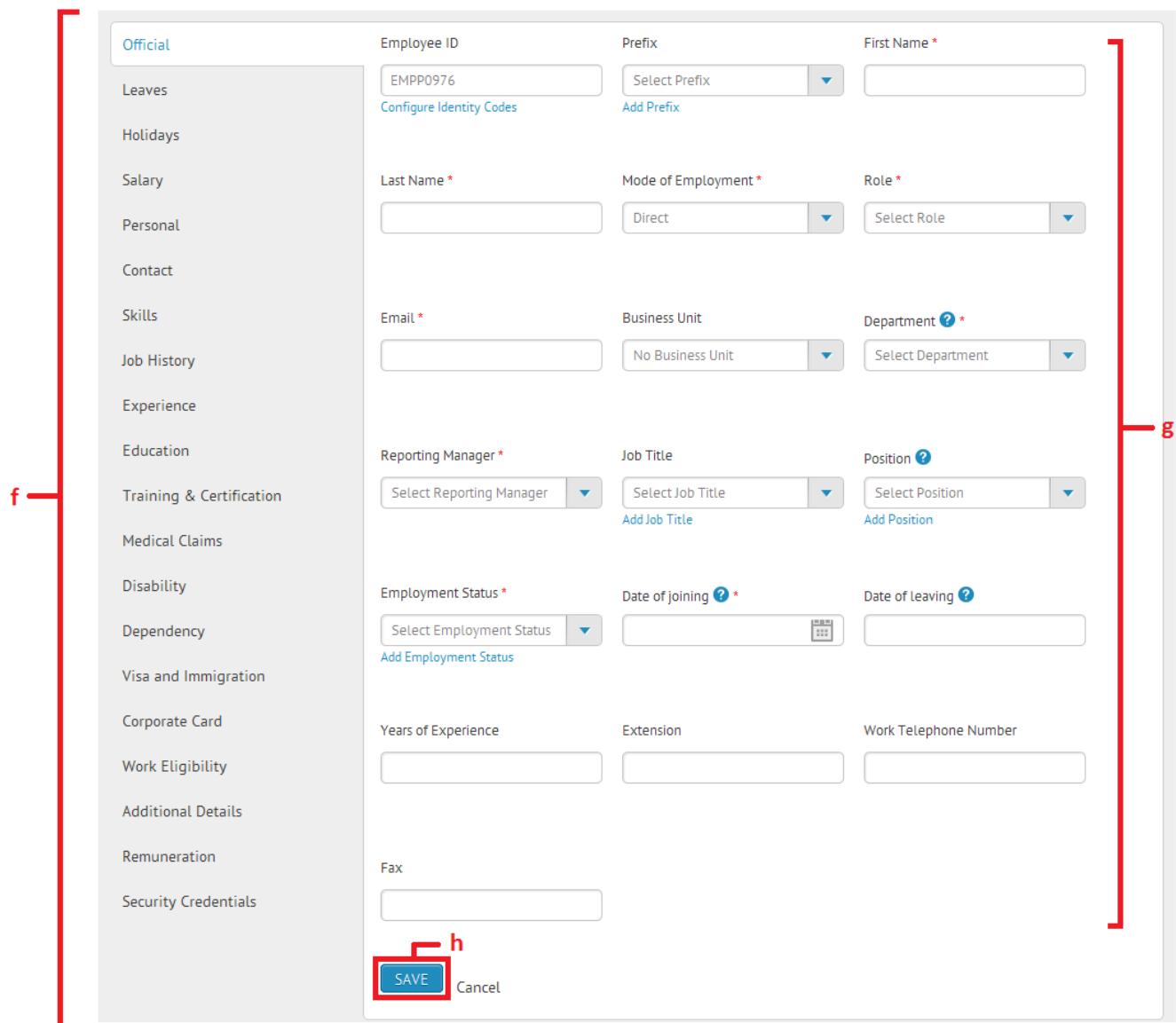


Figure 27

- 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



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

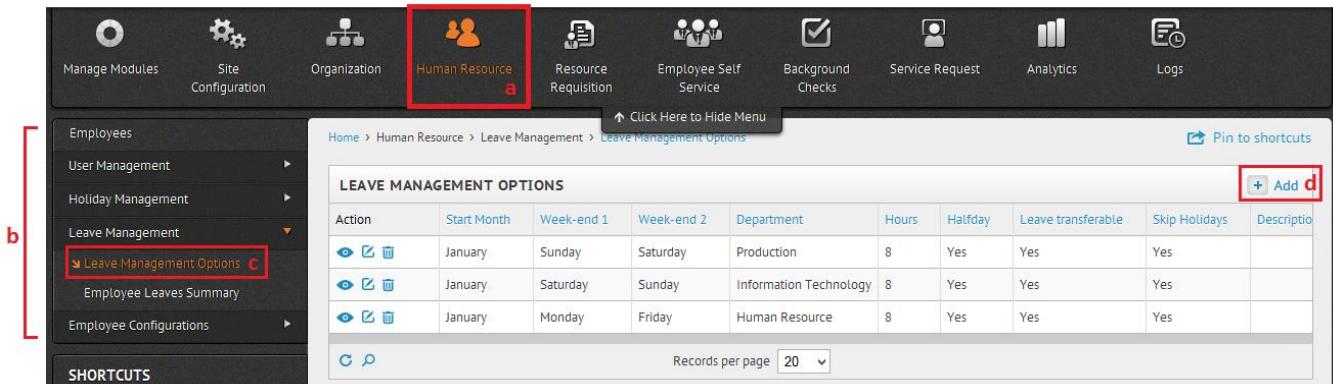
Section	Field / Option	Description
Employee ID	EMPP0976	Employee ID field
Prefix	Select Prefix	Prefix dropdown
First Name *		First Name required field
Leaves	Configure Identity Codes	Link to configuration page
Holidays		
Salary	Last Name *	Last Name required field
Personal	Mode of Employment *	Mode of Employment required field
Contact	Role *	Role required field
Skills	Email *	Email required field
Job History	Business Unit	Business Unit dropdown
Experience	No Business Unit	No Business Unit option
Education	Department ? *	Department required field
Training & Certification	Select Department	Select Department dropdown
Medical Claims	Reporting Manager *	Reporting Manager required field
Disability	Select Reporting Manager	Select Reporting Manager dropdown
Dependency	Job Title	Job Title dropdown
Visa and Immigration	Add Job Title	Add Job Title link
Corporate Card	Position ?	Position required field
Work Eligibility	Select Position	Select Position dropdown
Additional Details	Add Position	Add Position link
Remuneration	Employment Status *	Employment Status required field
Security Credentials	Date of joining ? *	Date of joining required field
	Date of leaving ?	Date of leaving optional field
	Select Employment Status	Select Employment Status dropdown
	Add Employment Status	Add Employment Status link
	Years of Experience	Years of Experience field
	Extension	Extension field
	Work Telephone Number	Work Telephone Number field
Fax		Fax field
	SAVE	Save button (annotated 'h')
	Cancel	Cancel button (annotated 'g')

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



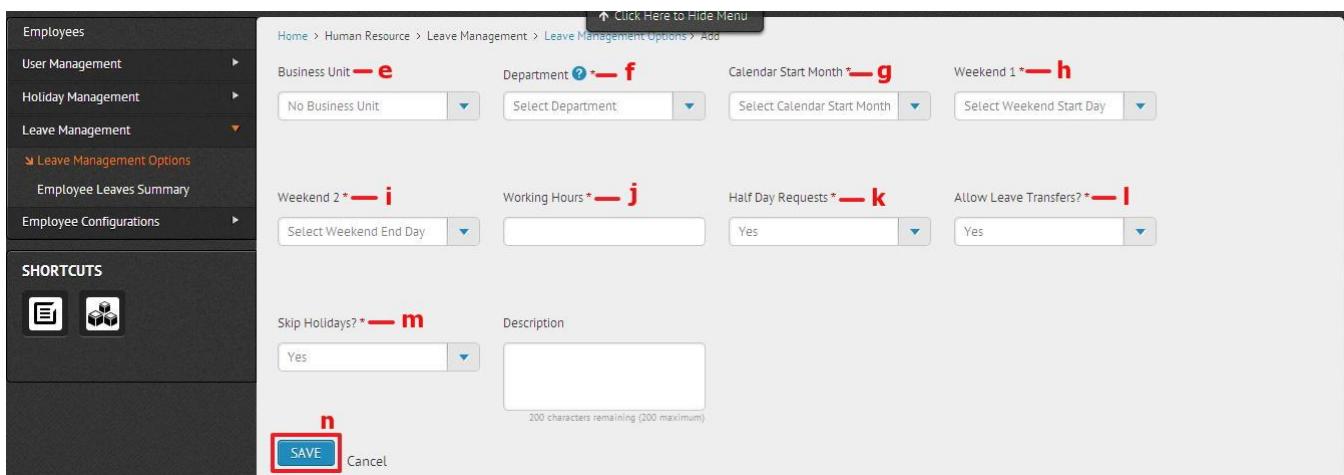
The screenshot shows the Sentrifugo open source HRMS application. At the top, there is a navigation bar with various icons and links: Manage Modules, Site Configuration, Organization, Human Resource (highlighted with a red box and labeled 'a'), Resource Requisition, Employee Self Service, Background Checks, Service Request, Analytics, and Logs. Below the navigation bar is a breadcrumb trail: Home > Human Resource > Leave Management > Leave Management Options. To the right of the breadcrumb trail is a 'Click Here to Hide Menu' link and a 'Pin to shortcuts' button. The main content area is titled 'LEAVE MANAGEMENT OPTIONS'. It contains a table with columns: Action, Start Month, Week-end 1, Week-end 2, Department, Hours, Halfday, Leave transferable, Skip Holidays, and Description. There are three rows of data in the table. At the bottom of the table is a 'Records per page' dropdown set to 20. On the far right of the main content area is a '+ Add' button (highlighted with a red box and labeled 'd'). A red bracket labeled 'b' points to the left sidebar, which lists: Employees, User Management, Holiday Management, Leave Management (highlighted with a red box and labeled 'c'), Employee Leaves Summary, Employee Configurations, and SHORTCUTS.

Action	Start Month	Week-end 1	Week-end 2	Department	Hours	Halfday	Leave transferable	Skip Holidays	Description
	January	Sunday	Saturday	Production	8	Yes	Yes	Yes	
	January	Saturday	Sunday	Information Technology	8	Yes	Yes	Yes	
	January	Monday	Friday	Human Resource	8	Yes	Yes	Yes	

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



The screenshot shows the 'Leave Management Options > Add' page. The left sidebar has 'Leave Management Options' selected. The main form contains the following fields:

- Business Unit \* — e: No Business Unit (dropdown)
- 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: (text input field)
- Half Day Requests \* — k: Yes (dropdown)
- Allow Leave Transfers? \* — l: Yes (dropdown)
- Skip Holidays? \* — m: Yes (dropdown)
- Description: (text area) 200 characters remaining (200 maximum)

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

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

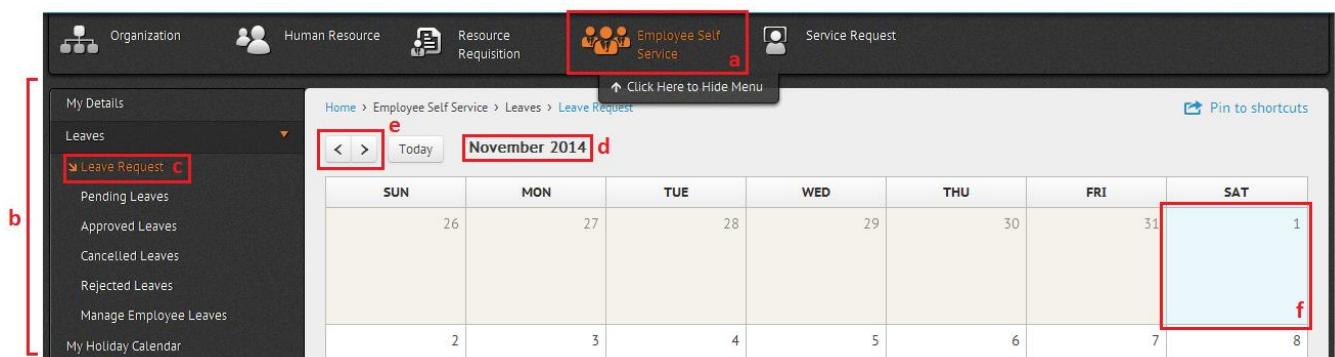


Figure 31

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

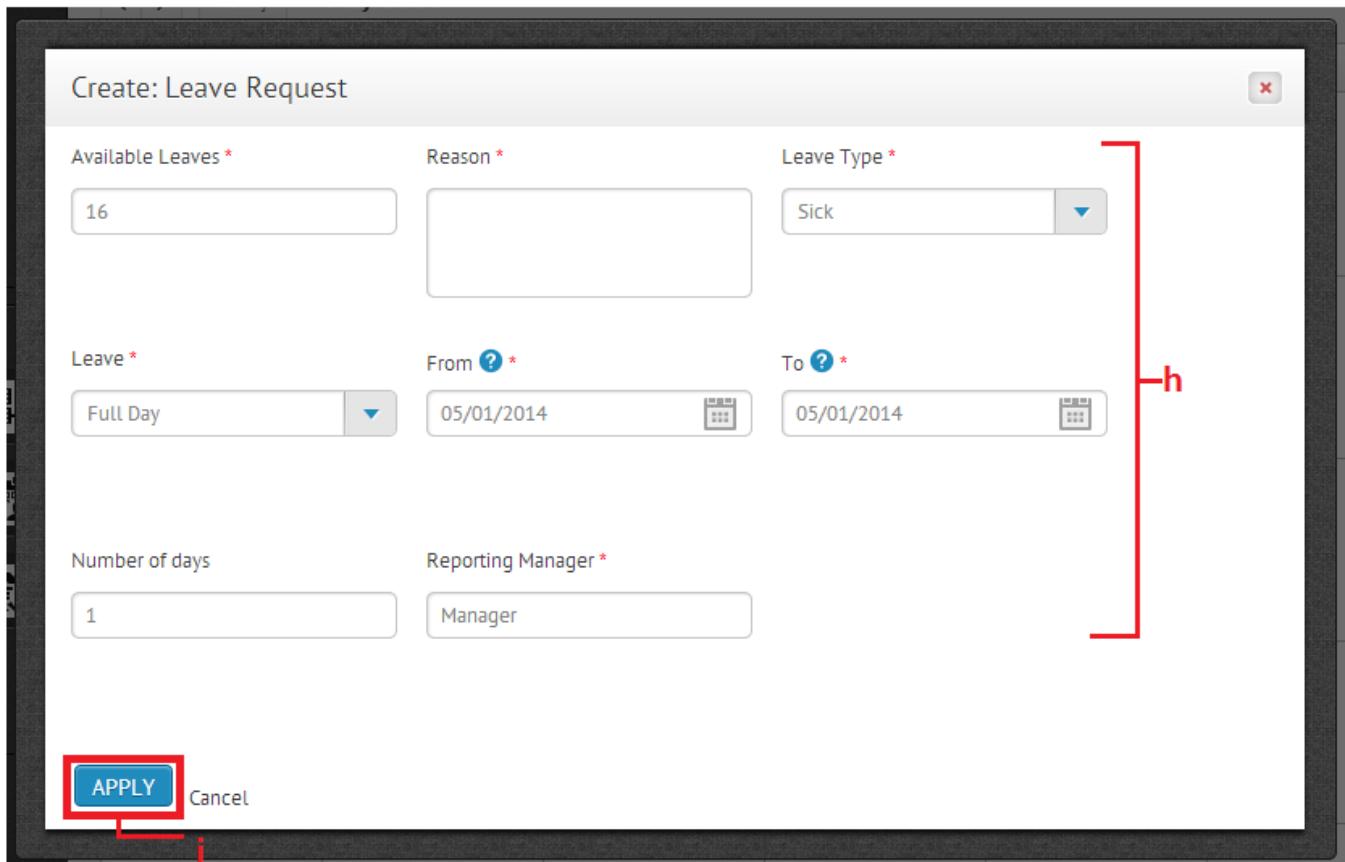
Refer Figure 32



Figure 32

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

Refer Figure 33



Create: Leave Request

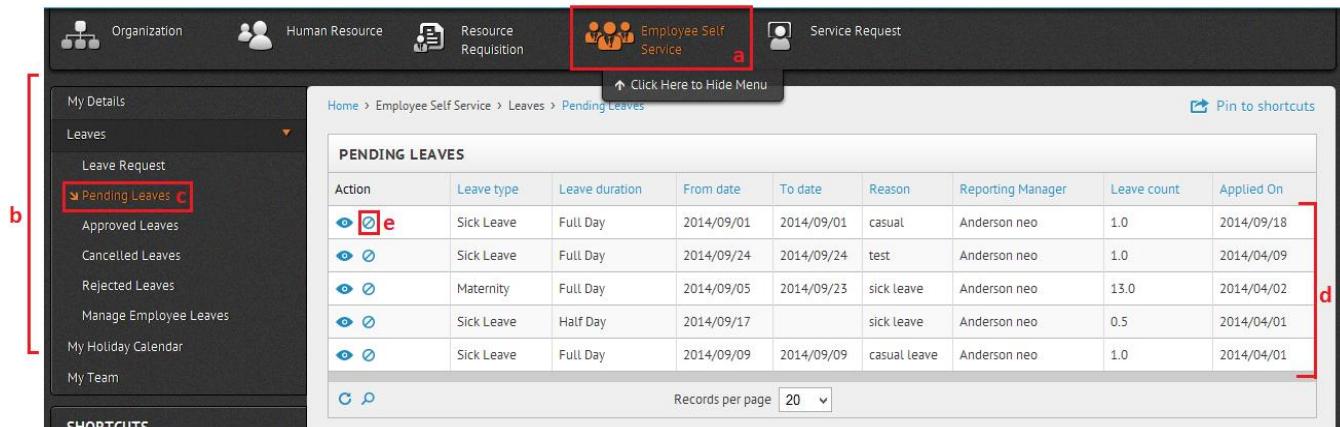
Available Leaves *	Reason *	Leave Type *
16		Sick
Leave *	From ? *	To ? *
Full Day	05/01/2014	05/01/2014
Number of days	Reporting Manager *	
1	Manager	
<b>APPLY</b> Cancel		

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



Action	Leave type	Leave duration	From date	To date	Reason	Reporting Manager	Leave count	Applied On
	Sick Leave	Full Day	2014/09/01	2014/09/01	casual	Anderson neo	1.0	2014/09/18
	Sick Leave	Full Day	2014/09/24	2014/09/24	test	Anderson neo	1.0	2014/04/09
	Maternity	Full Day	2014/09/05	2014/09/23	sick leave	Anderson neo	13.0	2014/04/02
	Sick Leave	Half Day	2014/09/17		sick leave	Anderson neo	0.5	2014/04/01
	Sick Leave	Full Day	2014/09/09	2014/09/09	casual leave	Anderson neo	1.0	2014/04/01

Figure 34

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

Refer Figure 35

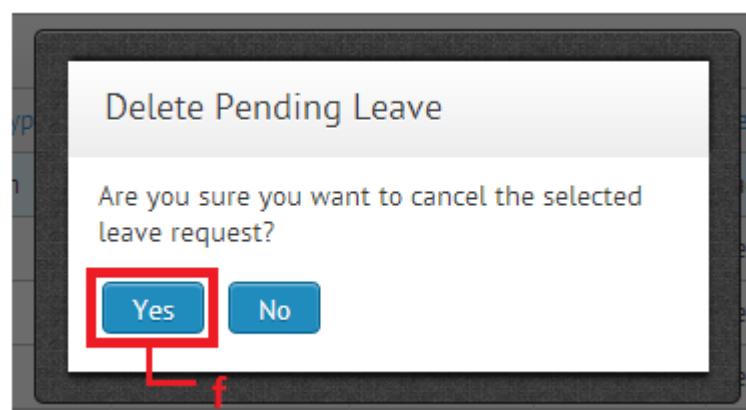
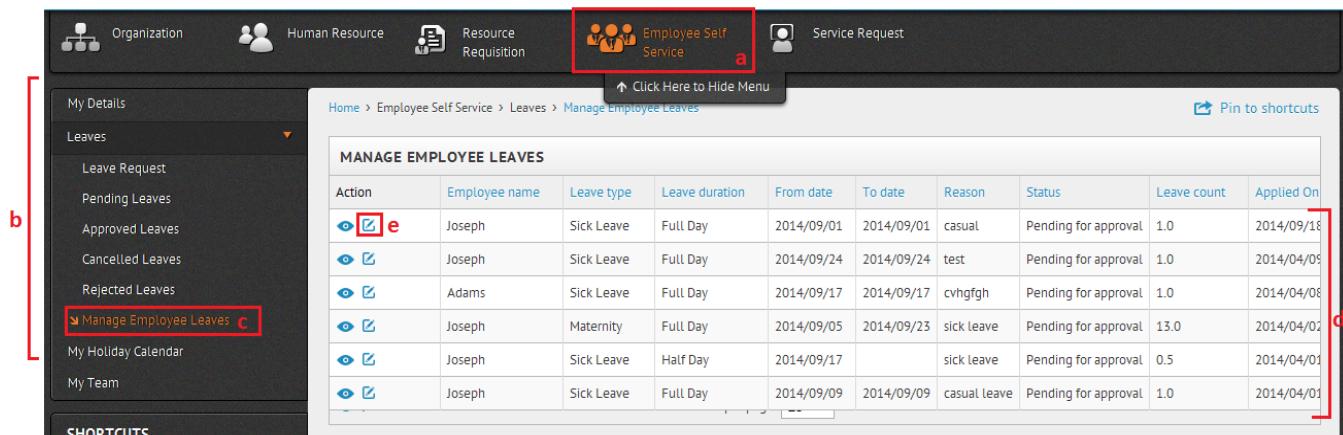


Figure 35

## 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



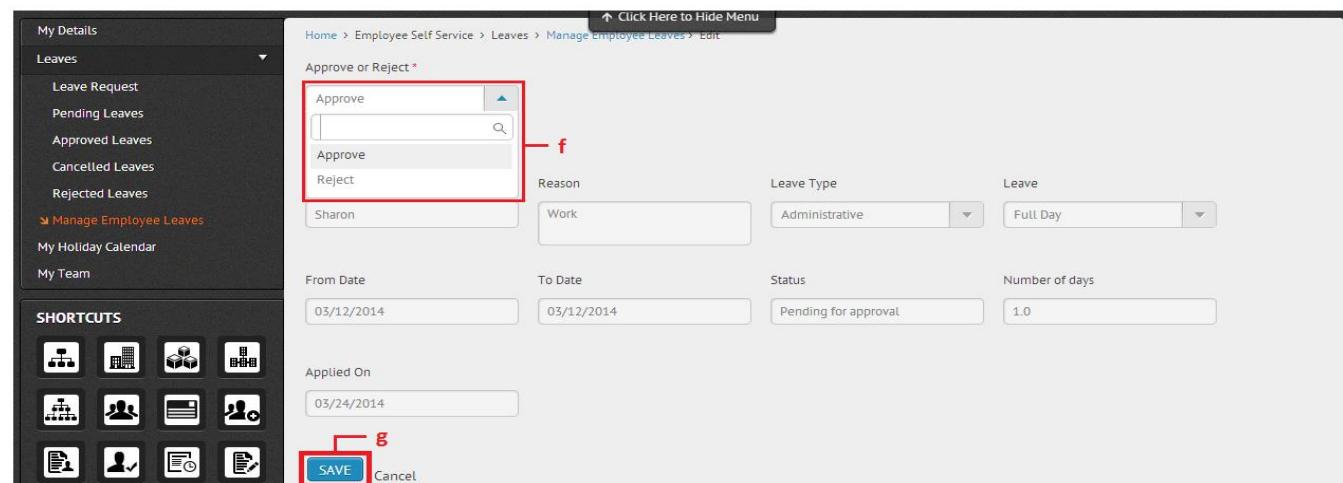
The screenshot shows the Sentrifugo Employee Self Service interface. At the top, there is a navigation bar with icons for Organization, Human Resource, Resource Requisition, Employee Self Service (which is highlighted with a red box and labeled 'a'), and Service Request. Below the navigation bar is a left sidebar with a 'My Details' section and a 'Leaves' section containing links for Leave Request, Pending Leaves, Approved Leaves, Cancelled Leaves, Rejected Leaves, and Manage Employee Leaves (which is highlighted with a red box and labeled 'c'). The main content area is titled 'MANAGE EMPLOYEE LEAVES' and displays a table of leave requests. The table has columns for Action, Employee name, Leave type, Leave duration, From date, To date, Reason, Status, Leave count, and Applied On. Several rows are listed, each with an edit icon (highlighted with a red box and labeled 'e') and a delete icon. A red bracket 'b' points to the left sidebar, and a red bracket 'd' points to the right edge of the main content area.

Action	Employee name	Leave type	Leave duration	From date	To date	Reason	Status	Leave count	Applied On
	Joseph	Sick Leave	Full Day	2014/09/01	2014/09/01	casual	Pending for approval	1.0	2014/09/18
	Joseph	Sick Leave	Full Day	2014/09/24	2014/09/24	test	Pending for approval	1.0	2014/04/09
	Adams	Sick Leave	Full Day	2014/09/17	2014/09/17	cvhgfhg	Pending for approval	1.0	2014/04/08
	Joseph	Maternity	Full Day	2014/09/05	2014/09/23	sick leave	Pending for approval	13.0	2014/04/02
	Joseph	Sick Leave	Half Day	2014/09/17		sick leave	Pending for approval	0.5	2014/04/01
	Joseph	Sick Leave	Full Day	2014/09/09	2014/09/09	casual leave	Pending for approval	1.0	2014/04/01

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



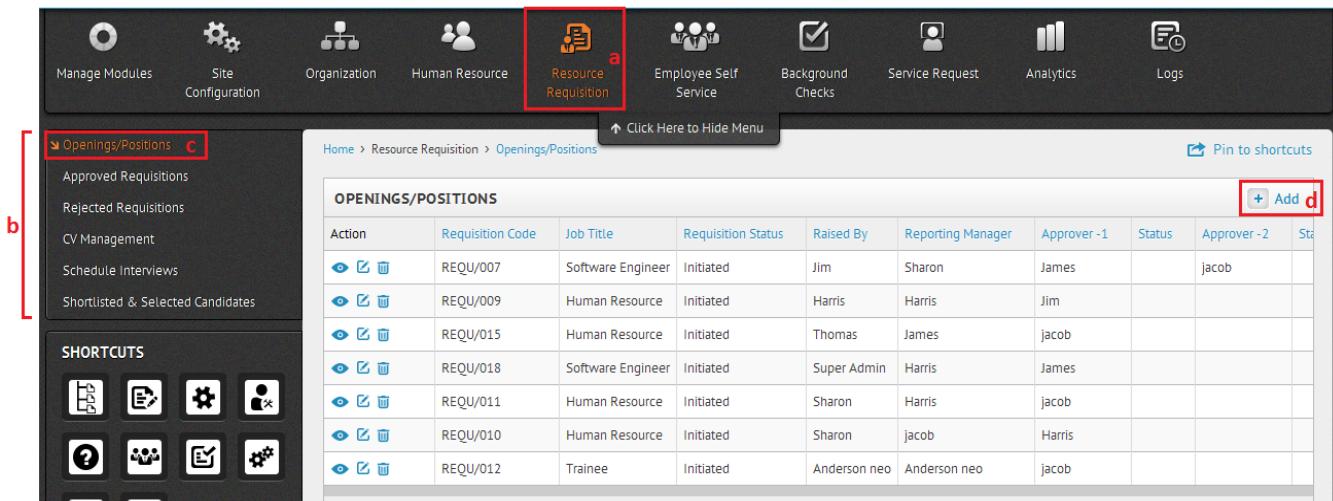
The screenshot shows the 'Approve or Reject' dialog box. It contains a dropdown menu with 'Approve' (highlighted with a red box and labeled 'f') and 'Reject' options. Below the dropdown are fields for 'Reason' (containing 'Sharon') and 'Leave Type' (containing 'Administrative'). There are also fields for 'From Date' (03/12/2014), 'To Date' (03/12/2014), 'Status' (Pending for approval), and 'Number of days' (1.0). At the bottom of the dialog are 'Applied On' (03/24/2014) and two buttons: 'SAVE' (highlighted with a red box and labeled 'g') and 'Cancel'. The left sidebar is identical to Figure 36.

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



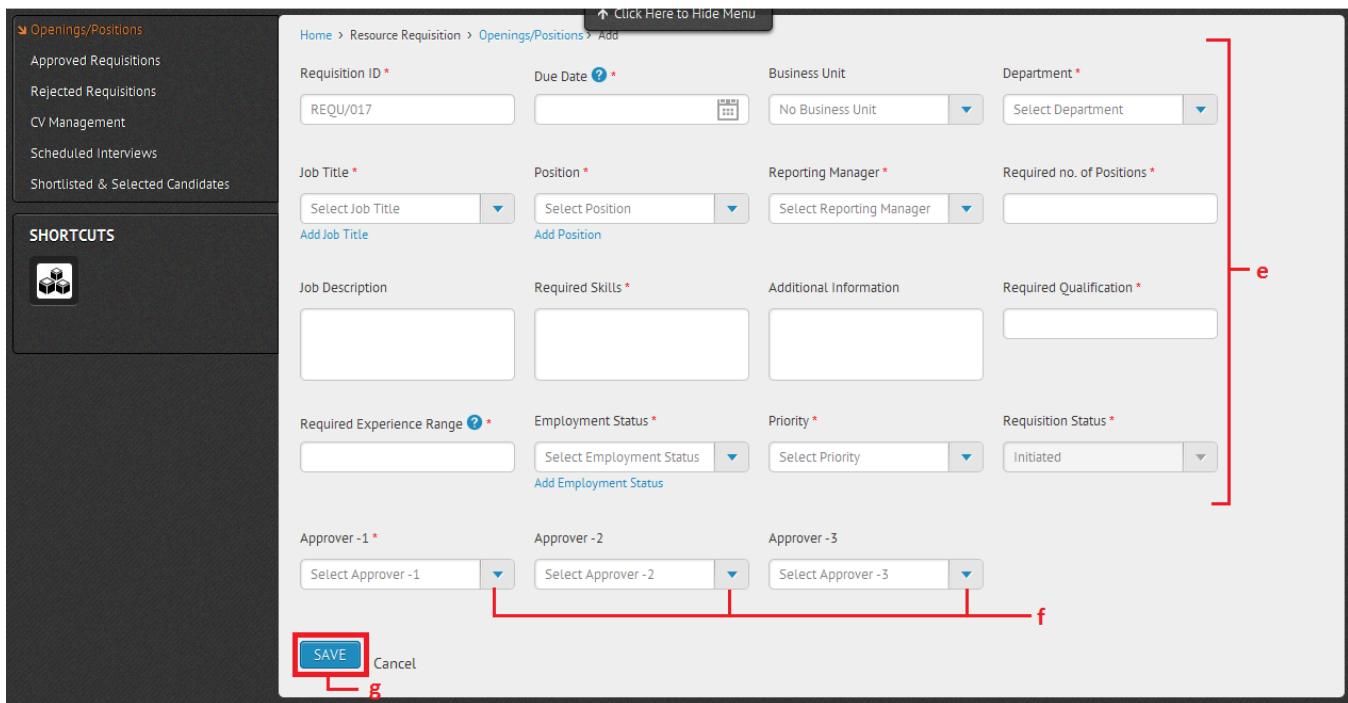
The screenshot shows the Sentrifugo HRMS application interface. At the top, there is a dark header bar with various icons and menu items: Manage Modules, Site Configuration, Organization, Human Resource, Resource Requisition (which is highlighted with a red box), Employee Self Service, Background Checks, Service Request, Analytics, and Logs. Below the header is a left sidebar with a red bracket labeled 'b' pointing to it. The sidebar contains a menu with several options: Approved Requisitions, Rejected Requisitions, CV Management, Schedule Interviews, and Shortlisted & Selected Candidates. To the right of the sidebar is the main content area. At the top of this area, there is a breadcrumb navigation: Home > Resource Requisition > Openings/Positions. Below the breadcrumb is a section titled 'OPENINGS/POSITIONS' with a table. The table has columns for Action, Requisition Code, Job Title, Requisition Status, Raised By, Reporting Manager, Approver -1, Status, Approver -2, and St. The table contains 8 rows of data. In the top right corner of the main content area, there is a red box labeled 'd' highlighting the '+ Add' button.

Action	Requisition Code	Job Title	Requisition Status	Raised By	Reporting Manager	Approver -1	Status	Approver -2	St
	REQU/007	Software Engineer	Initiated	Jim	Sharon	James		jacob	
	REQU/009	Human Resource	Initiated	Harris	Harris	Jim			
	REQU/015	Human Resource	Initiated	Thomas	James	jacob			
	REQU/018	Software Engineer	Initiated	Super Admin	Harris	James			
	REQU/011	Human Resource	Initiated	Sharon	Harris	jacob			
	REQU/010	Human Resource	Initiated	Sharon	jacob	Harris			
	REQU/012	Trainee	Initiated	Anderson neo	Anderson neo	jacob			

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



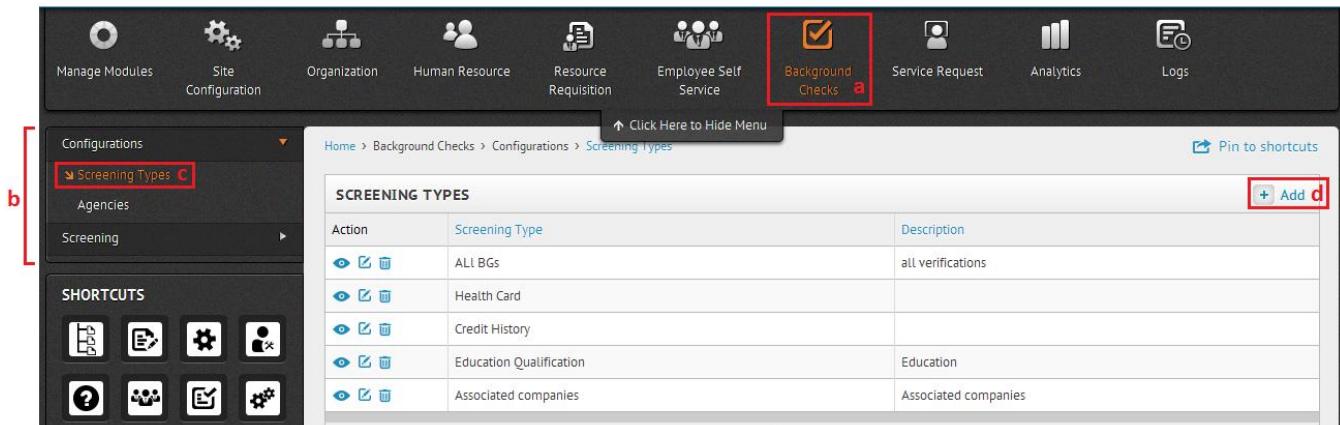
The screenshot shows the 'Openings/Positions' section of the Sentrifugo interface. On the left, there's a sidebar with links like 'Approved Requisitions', 'Rejected Requisitions', 'CV Management', 'Scheduled Interviews', and 'Shortlisted & Selected Candidates'. Below that is a 'SHORTCUTS' section with a cube icon. The main area has a breadcrumb navigation: Home > Resource Requisition > Openings/Positions > Add. It contains fields for 'Requisition ID' (REQU/017), 'Due Date', 'Business Unit' (No Business Unit), 'Department' (Select Department), 'Job Title' (Select Job Title), 'Position' (Select Position), 'Reporting Manager' (Select Reporting Manager), 'Required no. of Positions', 'Job Description', 'Required Skills', 'Additional Information', 'Required Qualification', 'Required Experience Range', 'Employment Status' (Select Employment Status), 'Priority' (Select Priority), 'Requisition Status' (Initiated), 'Approver -1', 'Approver -2', and 'Approver -3'. At the bottom are 'SAVE' and 'Cancel' buttons.

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

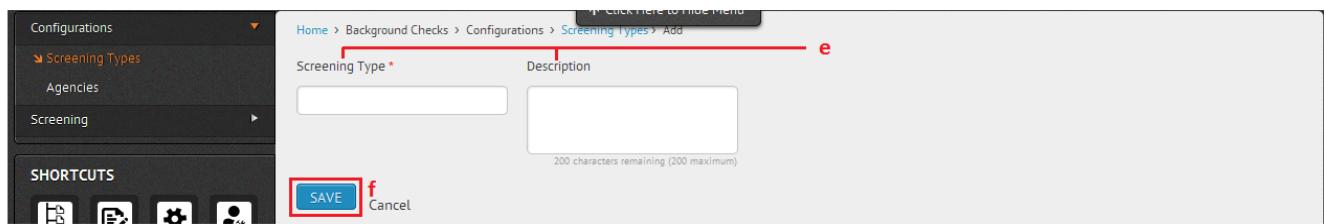


Action	Screening Type	Description
	ALL BGs	all verifications
	Health Card	
	Credit History	
	Education Qualification	Education
	Associated companies	Associated companies

Figure 40

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

Refer Figure 41



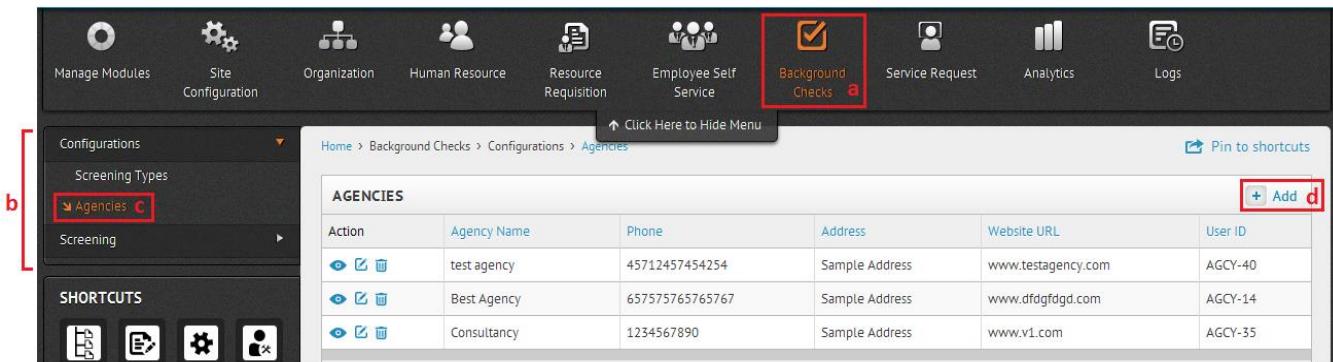
Screening Type *	Description
<input type="text"/>	<input type="text"/>
200 characters remaining (200 maximum)	

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



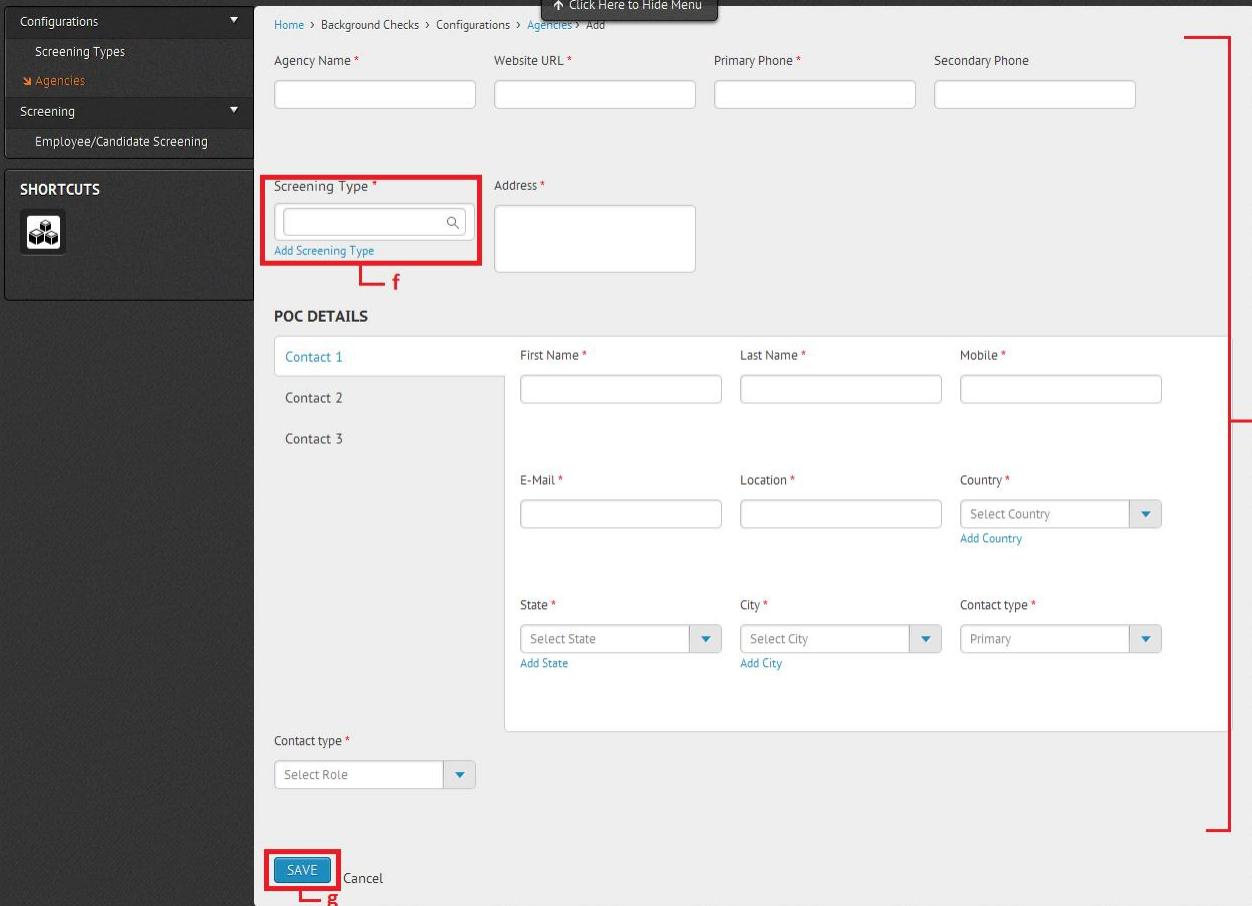
The screenshot shows the Sentrifugo application interface. At the top, there is a navigation bar with various icons and links: Manage Modules, Site Configuration, Organization, Human Resource, Resource Requisition, Employee Self Service, Background Checks (which is highlighted with a red box and labeled 'a'), Service Request, Analytics, and Logs. Below the navigation bar, a dropdown menu is open, showing 'Configurations' and 'Screening Types'. Under 'Screening Types', the 'Agencies' option is highlighted with a red box and labeled 'c'. To the right of the dropdown, there is a breadcrumb trail: Home > Background Checks > Configurations > Agencies. Below the dropdown, there is a 'SHORTCUTS' section with four icons. The main content area is titled 'AGENCIES' and contains a table with three rows of data. The table has columns for Action, Agency Name, Phone, Address, Website URL, and User ID. The first row contains 'test agency', '45712457454254', 'Sample Address', 'www.testagency.com', and 'AGCY-40'. The second row contains 'Best Agency', '657575765765767', 'Sample Address', 'www.dfdgfdgd.com', and 'AGCY-14'. The third row contains 'Consultancy', '1234567890', 'Sample Address', 'www.v1.com', and 'AGCY-35'. In the top right corner of the main content area, there is a '+ Add' button, which is also highlighted with a red box and labeled 'd'.

Action	Agency Name	Phone	Address	Website URL	User ID
	test agency	45712457454254	Sample Address	www.testagency.com	AGCY-40
	Best Agency	657575765765767	Sample Address	www.dfdgfdgd.com	AGCY-14
	Consultancy	1234567890	Sample Address	www.v1.com	AGCY-35

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



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

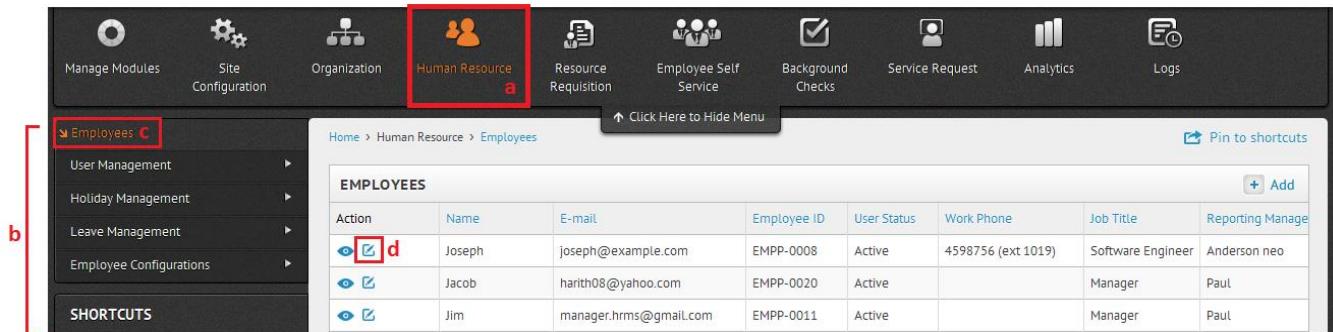
- Header:** Agency Name \* (text input), Website URL \* (text input), Primary Phone \* (text input), Secondary Phone (text input).
- Screening Type:** A dropdown menu labeled 'Screening Type \*' with a magnifying glass icon. A red box labeled 'f' surrounds this field.
- Address:** Address \* (text input).
- POC DETAILS:**
  - Contact 1:** First Name \* (text input), Last Name \* (text input), Mobile \* (text input).
  - Contact 2:** E-Mail \* (text input), Location \* (text input), Country \* (dropdown menu with 'Select Country' placeholder). Below it is a link 'Add Country'.
  - Contact 3:** State \* (dropdown menu with 'Select State' placeholder), City \* (dropdown menu with 'Select City' placeholder), Contact type \* (dropdown menu with 'Primary' placeholder). Below it is a link 'Add City'.
  - Contact type:** A dropdown menu labeled 'Select Role'.
- Action Buttons:** A blue 'SAVE' button with a white outline and a red box labeled 'g' around it, and a 'Cancel' button.

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

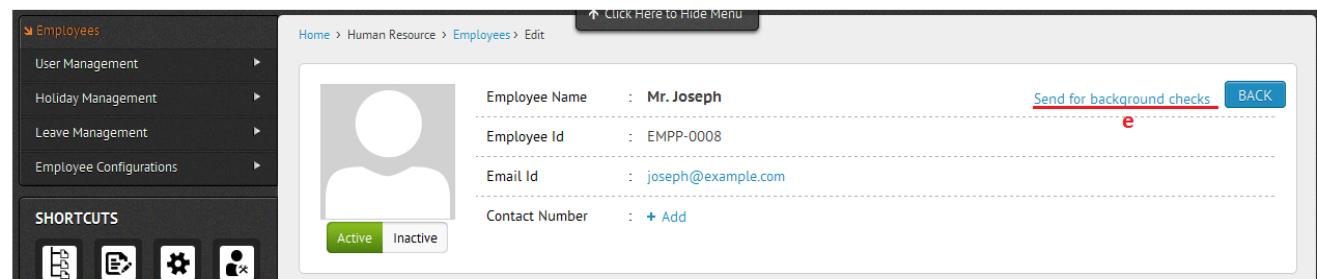


Action	Name	E-mail	Employee ID	User Status	Work Phone	Job Title	Reporting Manager
<b>d</b>	Joseph	joseph@example.com	EMPP-0008	Active	4598756 (ext 1019)	Software Engineer	Anderson neo
	Jacob	harith08@yahoo.com	EMPP-0020	Active		Manager	Paul
	Jim	manager.hrms@gmail.com	EMPP-0011	Active		Manager	Paul

Figure 44

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

Refer Figure 45



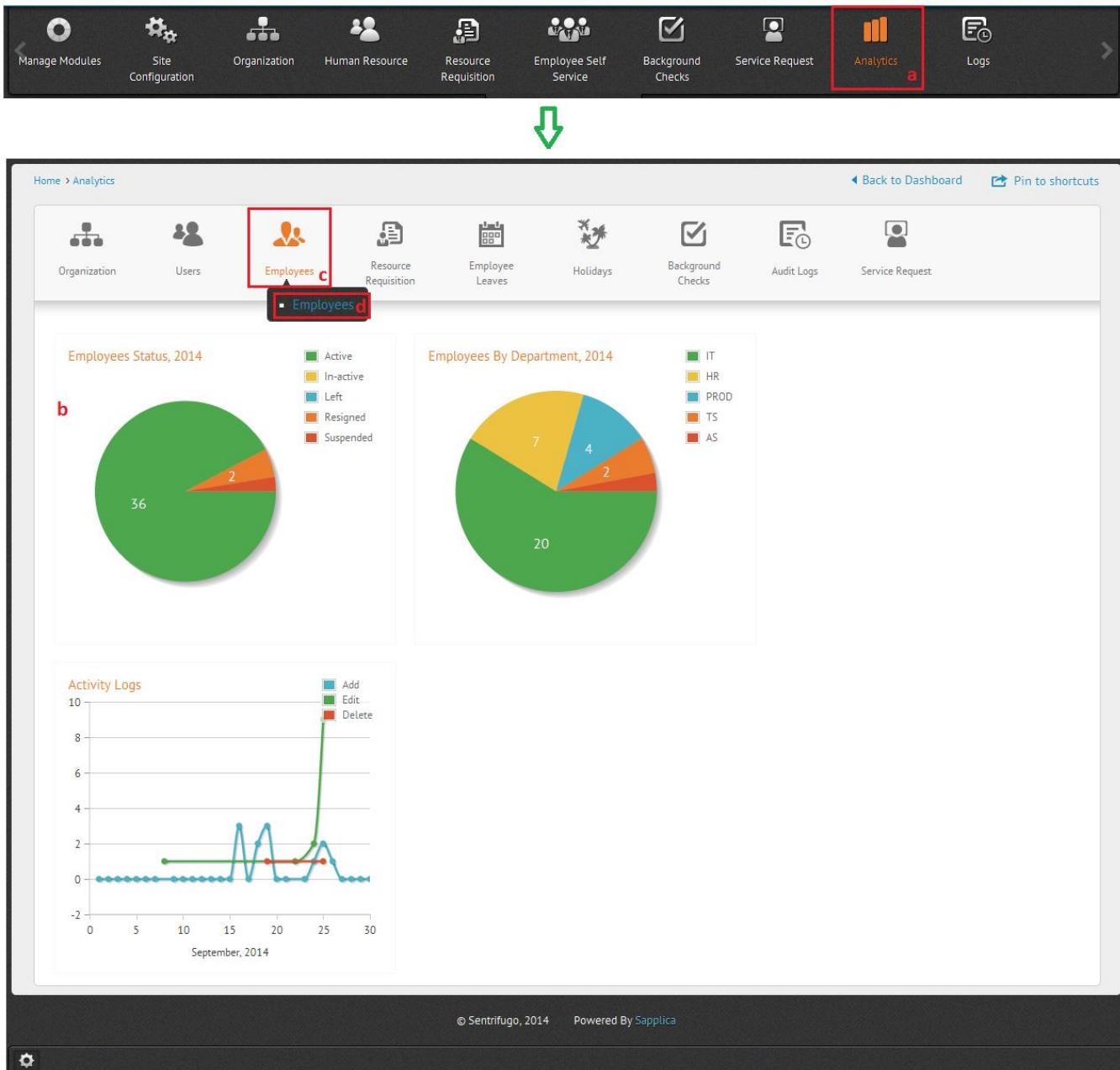
Employee Name : Mr. Joseph	<a href="#">Send for background checks</a>
Employee Id : EMPP-0008	<a href="#">BACK</a>
Email Id : joseph@example.com	
Contact Number : + Add	

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



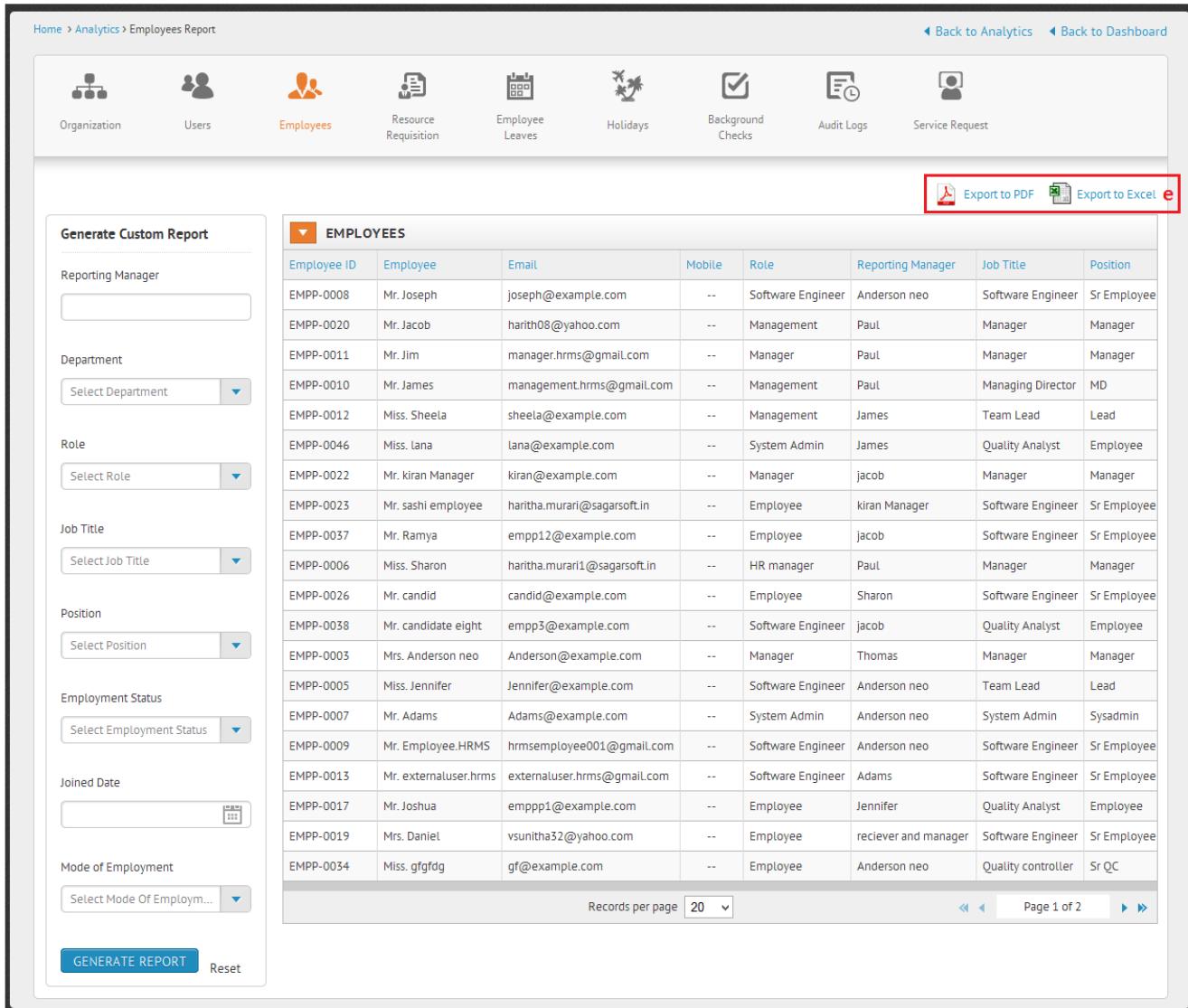
The screenshot shows the Sentrifugo Analytics interface. At the top, there is a navigation bar with icons for Manage Modules, Site Configuration, Organization, Human Resource, Resource Requisition, Employee Self Service, Background Checks, Service Request, Analytics (which is highlighted with a red box and labeled 'a'), and Logs.

A large green arrow points down from the top menu to the main content area. In the main content area, there is a breadcrumb trail: Home > Analytics. On the left, there is a horizontal menu with icons for Organization, Users, Employees (which is highlighted with a red box and labeled 'c'), Resource Requisition, Employee Leaves, Holidays, Background Checks, Audit Logs, and Service Request. Below this menu, there are two donut charts. The first chart, labeled 'Employees Status, 2014', shows 36 Active employees, 2 Resigned employees, and 0 for In-active, Left, and Suspended categories. The second chart, labeled 'Employees By Department, 2014', shows 20 IT employees, 7 HR employees, 4 PROD employees, 2 TS employees, and 0 AS employees. At the bottom, there is a line chart titled 'Activity Logs' showing the number of Add, Edit, and Delete operations over time in September 2014. The chart shows a significant spike in activity around September 25th.

Figure 46

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

Refer Figure 47



**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	sheetla@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

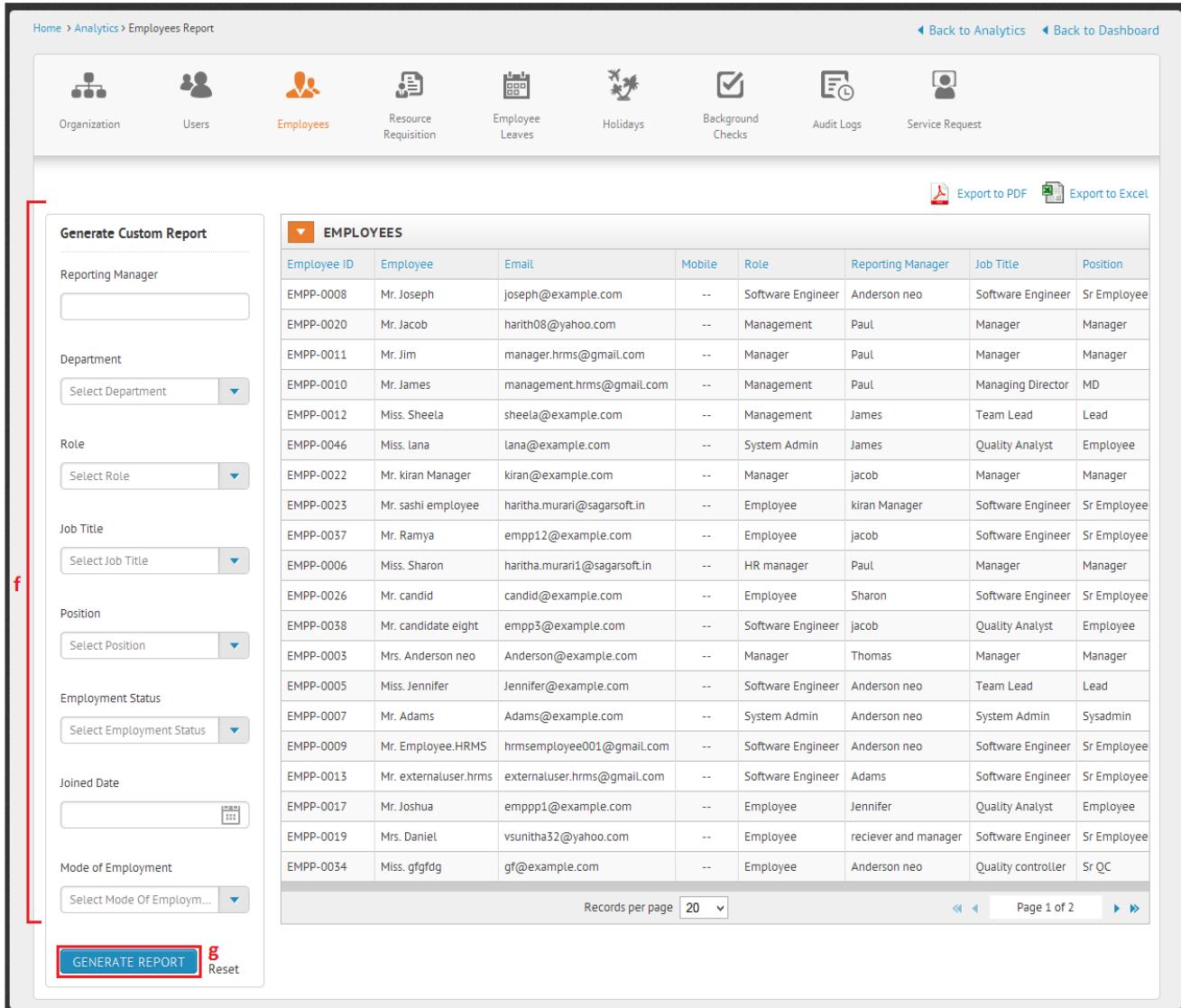
Records per page: 20 | Page 1 of 2

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



**Employees Report**

Home > Analytics > Employees Report

**NAVIGATION**

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

**EXPORT**

Export to PDF Export to Excel

**Generate Custom Report**

Reporting Manager:

Department:  Select Department

Role:  Select Role

Job Title:  Select Job Title

Position:  Select Position

Employment Status:  Select Employment Status

Joined Date:

Mode of Employment:  Select Mode Of Employm...

**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

Records per page:  20 Page 1 of 2

**Buttons**

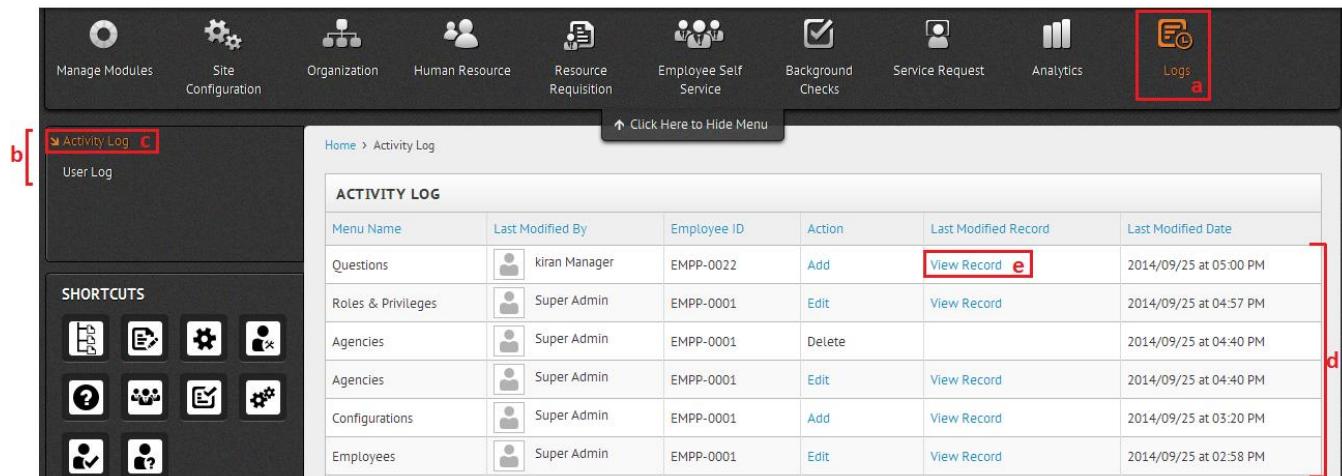
**GENERATE REPORT** Reset

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



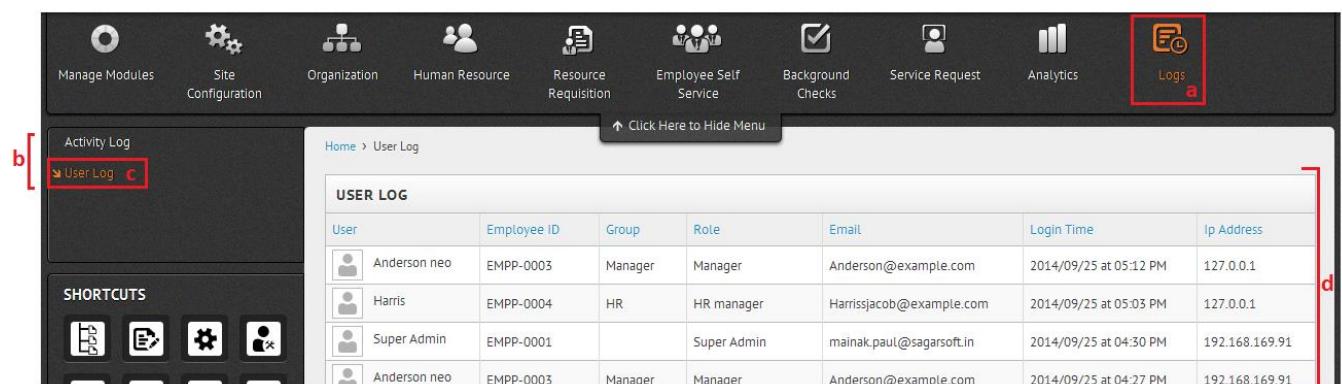
Menu Name	Last Modified By	Employee ID	Action	Last Modified Record	Last Modified Date
Questions	kiran Manager	EMPP-0022	Add	<a href="#">View Record e</a>	2014/09/25 at 05:00 PM
Roles & Privileges	Super Admin	EMPP-0001	Edit	<a href="#">View Record</a>	2014/09/25 at 04:57 PM
Agencies	Super Admin	EMPP-0001	Delete		2014/09/25 at 04:40 PM
Agencies	Super Admin	EMPP-0001	Edit	<a href="#">View Record</a>	2014/09/25 at 04:40 PM
Configurations	Super Admin	EMPP-0001	Add	<a href="#">View Record</a>	2014/09/25 at 03:20 PM
Employees	Super Admin	EMPP-0001	Edit	<a href="#">View Record</a>	2014/09/25 at 02:58 PM

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



User	Employee ID	Group	Role	Email	Login Time	Ip Address
Anderson neo	EMPP-0003	Manager	Manager	Anderson@example.com	2014/09/25 at 05:12 PM	127.0.0.1
Harris	EMPP-0004	HR	HR manager	Harrisjacob@example.com	2014/09/25 at 05:03 PM	127.0.0.1
Super Admin	EMPP-0001		Super Admin	mainak.paul@sagarsoft.in	2014/09/25 at 04:30 PM	192.168.169.91
Anderson neo	EMPP-0003	Manager	Manager	Anderson@example.com	2014/09/25 at 04:27 PM	192.168.169.91

Figure 50

## Looking to Set Shortcuts:

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

Refer Figure 51

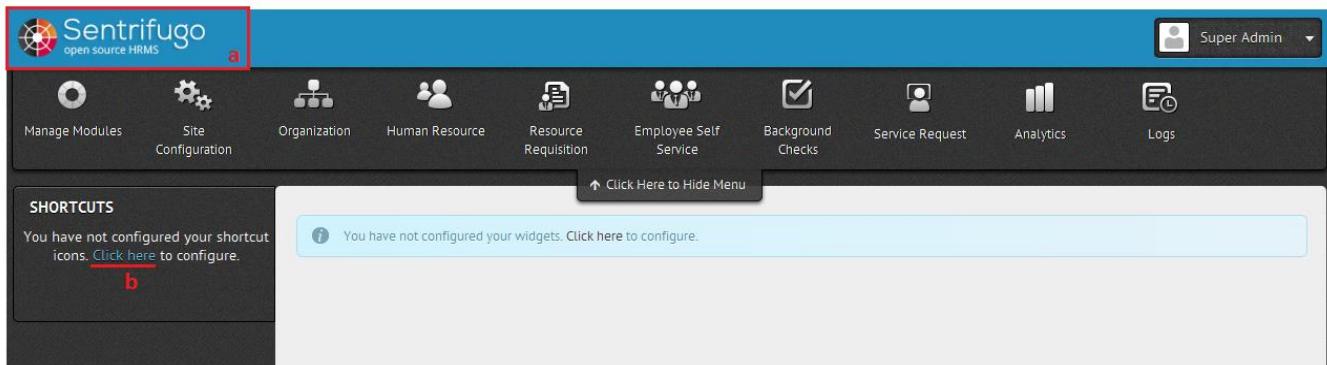


Figure 51

Or

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

Refer Figure 52

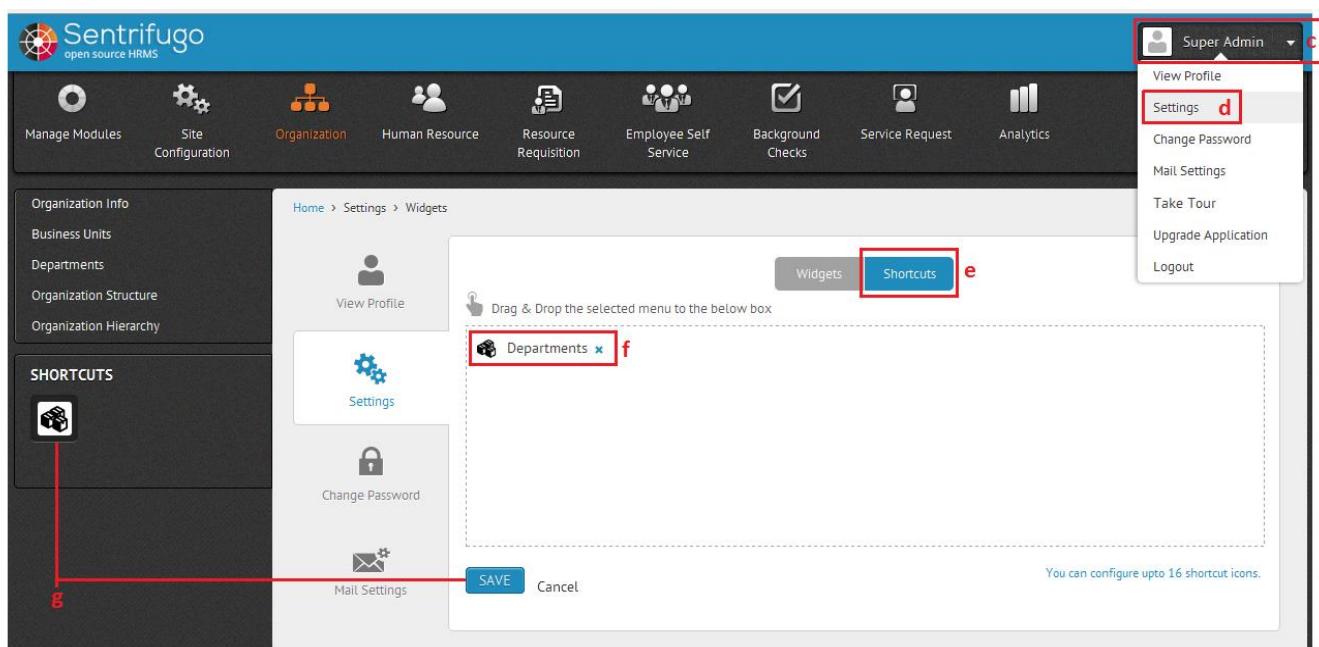
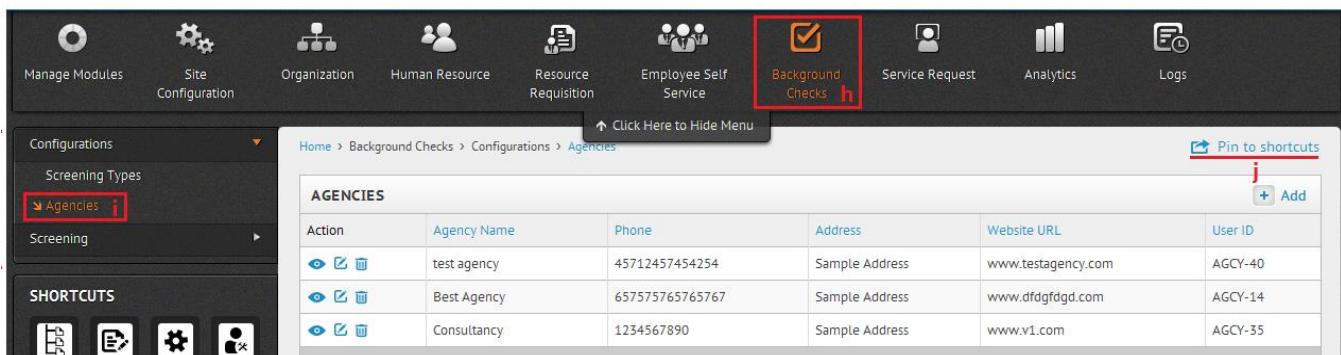


Figure 52

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



Action	Agency Name	Phone	Address	Website URL	User ID
	test agency	45712457454254	Sample Address	www.testagency.com	AGCY-40
	Best Agency	657575765765767	Sample Address	www.dfdgfdgd.com	AGCY-14
	Consultancy	1234567890	Sample Address	www.v1.com	AGCY-35

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

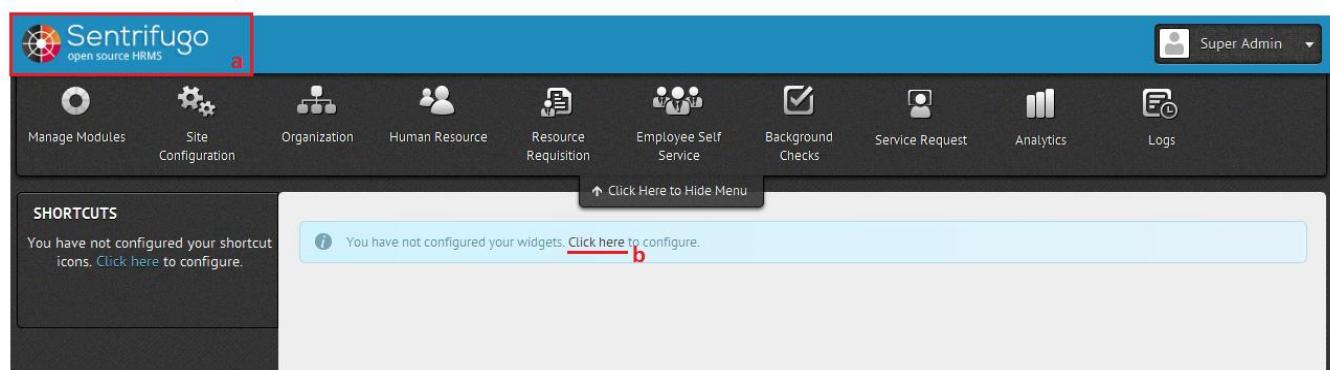


Figure 54

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

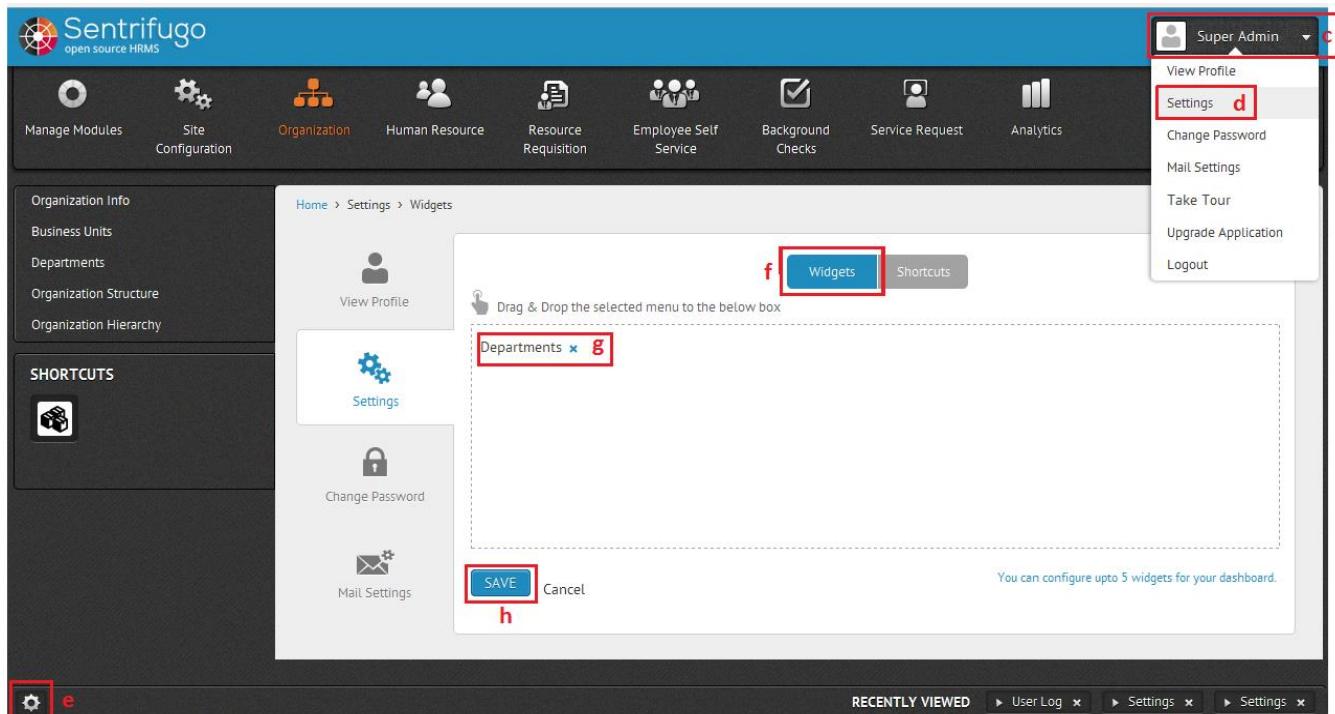
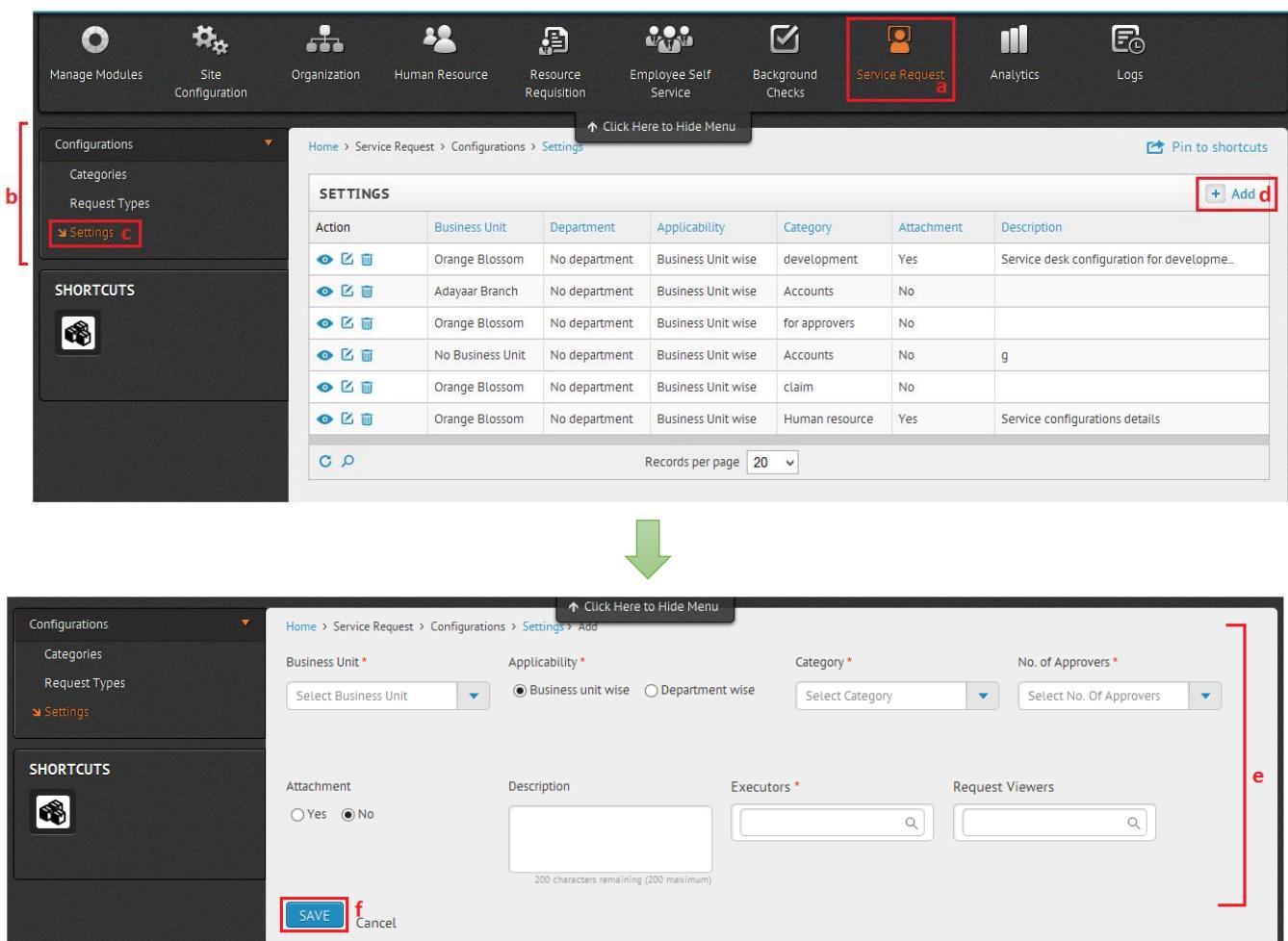


Figure 55

## 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



The figure consists of two screenshots of the Sentrifugo application interface. The top screenshot shows the 'Settings' page for 'Service Request' configurations. It includes a table with columns: Action, Business Unit, Department, Applicability, Category, Attachment, and Description. The bottom screenshot shows the 'Add Configuration' form for a new service request. It has fields for Business Unit, Applicability, Category, and No. of Approvers. Below these are fields for Attachment, Description, Executors, and Request Viewers. At the bottom of the form are 'SAVE' and 'Cancel' buttons.

SETTINGS						
Action	Business Unit	Department	Applicability	Category	Attachment	Description
	Orange Blossom	No department	Business Unit wise	development	Yes	Service desk configuration for developme..
	Adayaar Branch	No department	Business Unit wise	Accounts	No	
	Orange Blossom	No department	Business Unit wise	for approvers	No	
	No Business Unit	No department	Business Unit wise	Accounts	No	g
	Orange Blossom	No department	Business Unit wise	claim	No	
	Orange Blossom	No department	Business Unit wise	Human resource	Yes	Service configurations details

Records per page: 20

Business Unit \*      Applicability \*      Category \*      No. of Approvers \*

Select Business Unit      Select Category      Select No. of Approvers

Attachment      Description      Executors \*      Request Viewers

Attachment      Description      Executors \*      Request Viewers

200 characters remaining (200 maximum)

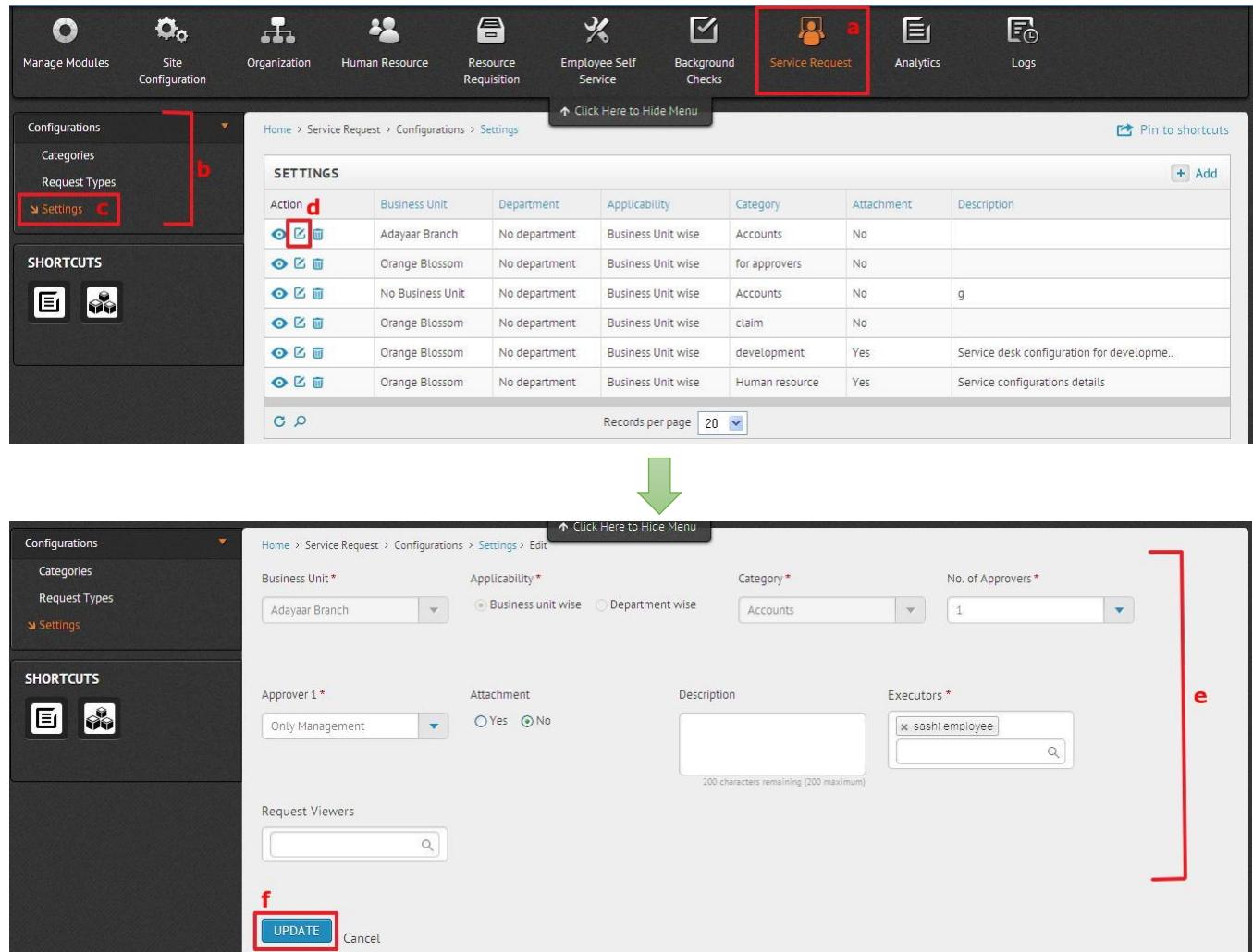
**SAVE**      **Cancel**

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



The screenshot illustrates the steps to edit a service request configuration. It shows two views of the application's configuration screen.

**Top View (Settings Page):**

- Top Bar:** Shows various application icons: Manage Modules, Site Configuration, Organization, Human Resource, Resource Requisition, Employee Self Service, Background Checks, **Service Request** (highlighted with a red box and labeled 'a'), Analytics, and Logs.
- Left Sidebar:** Includes 'Configurations', 'Categories', 'Request Types', and a 'Settings' item (highlighted with a red box and labeled 'c'). A red bracket labeled 'b' groups 'Configurations', 'Categories', and 'Request Types'.
- Content Area:** Displays a table titled 'SETTINGS' with columns: Action (highlighted with a red box and labeled 'd'), Business Unit, Department, Applicability, Category, Attachment, and Description. The table lists several configurations for different business units like Adyaara Branch, Orange Blossom, etc.
- Bottom:** Includes a search bar and a 'Records per page' dropdown set to 20.

**Bottom View (Edit Configuration Page):**

- Top Bar:** Similar to the top view, with the 'Service Request' icon highlighted.
- Left Sidebar:** Same as the top view, with 'Settings' selected.
- Content Area:** Shows the details for a specific configuration:
  - Action: Adyaara Branch
  - Applicability: Business unit wise
  - Category: Accounts
  - No. of Approvers: 1
  - Approver 1: Only Management
  - Attachment: No
  - Description: (empty)
  - Executors: sashi employee
  - Request Viewers: (empty)
- Bottom:** Includes 'UPDATE' and 'Cancel' buttons (the 'UPDATE' button is highlighted with a red box and labeled 'f').

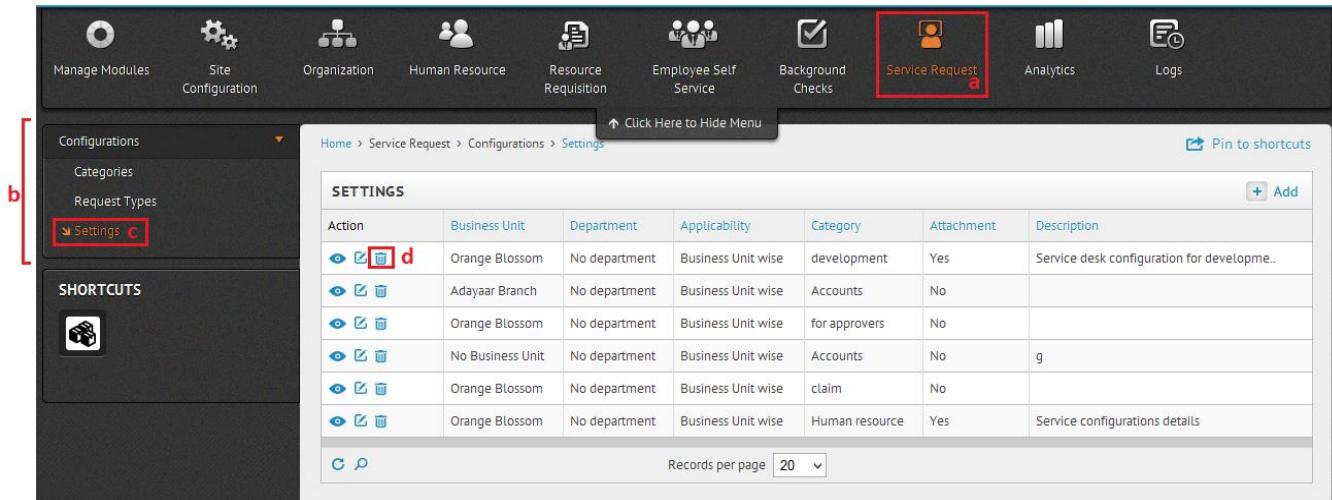
A large green arrow points from the bottom of the first view down to the second view, indicating the flow of the process.

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



Action	Business Unit	Department	Applicability	Category	Attachment	Description
	Orange Blossom	No department	Business Unit wise	development	Yes	Service desk configuration for developme..
	Adayaar Branch	No department	Business Unit wise	Accounts	No	
	Orange Blossom	No department	Business Unit wise	for approvers	No	
	No Business Unit	No department	Business Unit wise	Accounts	No	g
	Orange Blossom	No department	Business Unit wise	claim	No	
	Orange Blossom	No department	Business Unit wise	Human resource	Yes	Service configurations details

Figure 58

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

Refer to Figure 59

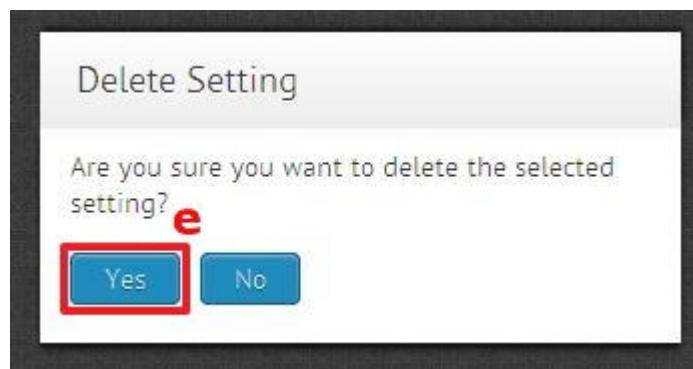


Figure 59

## 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

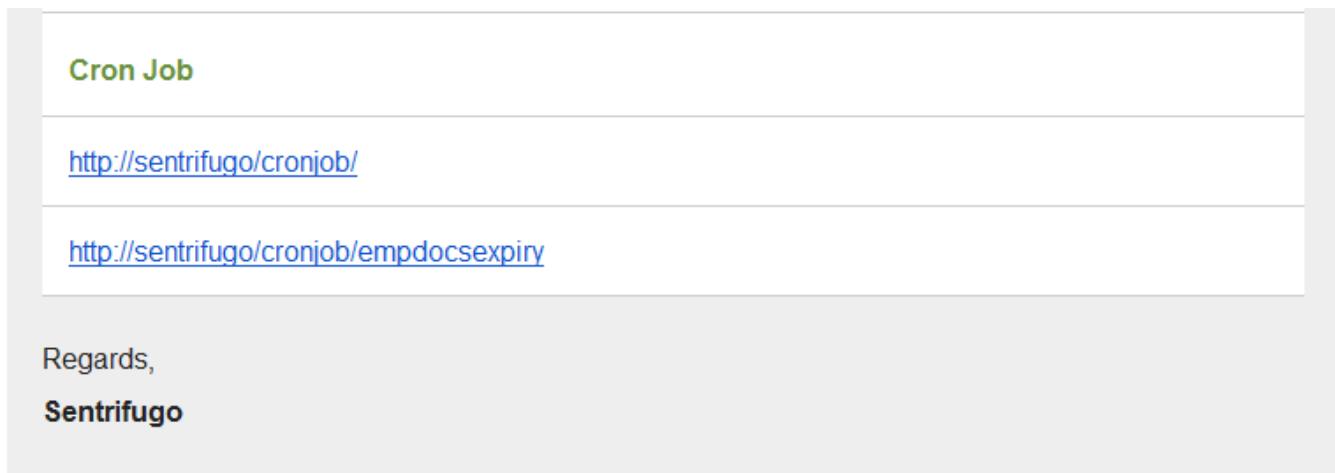
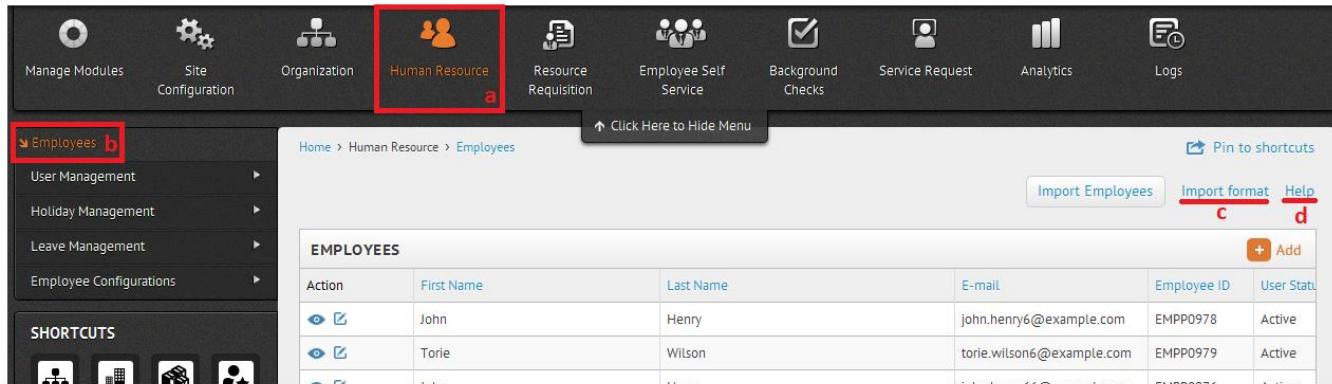


Figure 60

## 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 61



The screenshot shows the Sentrifugo HRMS interface. At the top, there is a navigation bar with various icons and links: Manage Modules, Site Configuration, Organization, Human Resource (highlighted with a red box), Resource Requisition, Employee Self Service, Background Checks, Service Request, Analytics, and Logs. Below the navigation bar is a left sidebar with a menu: Employees (highlighted with a red box), User Management, Holiday Management, Leave Management, Employee Configurations, and SHORTCUTS. The main content area is titled 'EMPLOYEES' and displays a grid of employee data. At the top of the grid, there are buttons for 'Import Employees', 'Import format' (highlighted with a red box), and 'Help'. The 'Import format' button has a red box around it. The grid columns include Action, First Name, Last Name, E-mail, Employee ID, and User Status. The data in the grid is as follows:

Action	First Name	Last Name	E-mail	Employee ID	User Status
	John	Henry	john.henry6@example.com	EMPP0978	Active
	Torie	Wilson	torie.wilson6@example.com	EMPP0979	Active
	John	Henry	john.benitez6@example.com	EMPP0980	Active

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



The screenshot shows an Excel spreadsheet with the following header row:

Prefix	First Name	Last Name	Role Type	Email	Business Unit	Department	Reporting manager	employee	Job Title	Position	Employment Status	Date of joining	Date of leaving	Experience	Extension	Work telephone number	Fax	Salary Currency	Pay Frequency	Salary
--------	------------	-----------	-----------	-------	---------------	------------	-------------------	----------	-----------	----------	-------------------	-----------------	-----------------	------------	-----------	-----------------------	-----	-----------------	---------------	--------

Figure 62

## 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 63

↑ Click Here to Hide Menu

Site Preferences

General

Ethnic Codes

Gender

Time Zones

Marital Status

Prefixes

Race Codes

Nationality Context Codes

Home > Site Configurations > General > Prefixes

Add

Action	Prefix <span style="color:red;">V</span>	Description
<span style="color:blue;">View</span> <span style="color:blue;">Edit</span> <span style="color:blue;">Delete</span>	Mrs	Mrs is a commonly used English honorific..
<span style="color:blue;">View</span> <span style="color:blue;">Edit</span> <span style="color:blue;">Delete</span>	Miss	Miss is an English language honorific t..
<span style="color:blue;">View</span> <span style="color:blue;">Edit</span> <span style="color:blue;">Delete</span>	Mr	Mister is a commonly used English honori..

Records per page 20

Figure 63

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 64

Figure 64

**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 65

The screenshot shows the Human Resource module interface. At the top, there is a navigation bar with icons for Manage Modules, Site Configurations, Organization, Human Resource (highlighted with a red box), Resource Requisition, Employee Self Service, Background Checks, Service Request, Analytics, and Logs. Below the navigation bar is a left sidebar with sections for Employees, User Management, Roles & Privileges, Manage External Users, Holiday Management, Leave Management, and Employee Configurations. The main content area displays a table titled 'ROLES & PRIVILEGES' with columns for Action, Role Name, Role Type (highlighted with a red box), Role Description, and Group. The table contains five rows of data. A modal window titled 'Click Here to Hide Menu' is open over the main content. The modal has a close button and a 'Pin to shortcuts' link. The bottom right corner of the modal has a red box labeled 'IV'.

Action	Role Name	Role Type	Role Description	Group
	Software Engineer	Employee	Design and develop programming systems m..	Employees
	External User	External	External Users can only visit the site.	External Users
	Agency User	Agency	Agency Users can Visit and comment on th..	External Users
	HR Manager	HRM	Human resource management is the managem..	HR

Figure 65

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 66

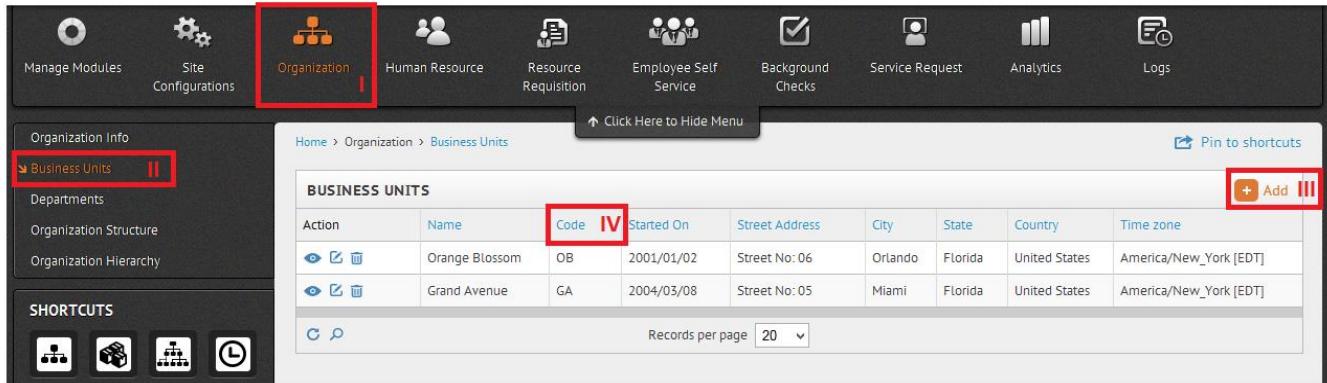
	C	D	E
ne	Role	Email	Business Unit

Figure 66

#### 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 67



Action	Name	Code	Started On	Street Address	City	State	Country	Time zone
	Orange Blossom	OB	2001/01/02	Street No: 06	Orlando	Florida	United States	America/New_York [EDT]
	Grand Avenue	GA	2004/03/08	Street No: 05	Miami	Florida	United States	America/New_York [EDT]

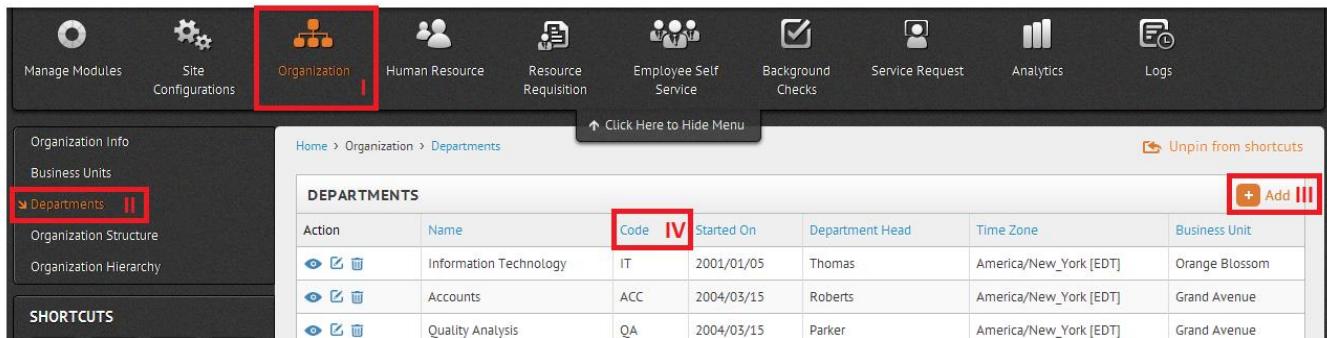
Figure 67

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 68



Action	Name	Code	Started On	Department Head	Time Zone	Business Unit
	Information Technology	IT	2001/01/05	Thomas	America/New_York [EDT]	Orange Blossom
	Accounts	ACC	2004/03/15	Roberts	America/New_York [EDT]	Grand Avenue
	Quality Analysis	QA	2004/03/15	Parker	America/New_York [EDT]	Grand Avenue

Figure 68

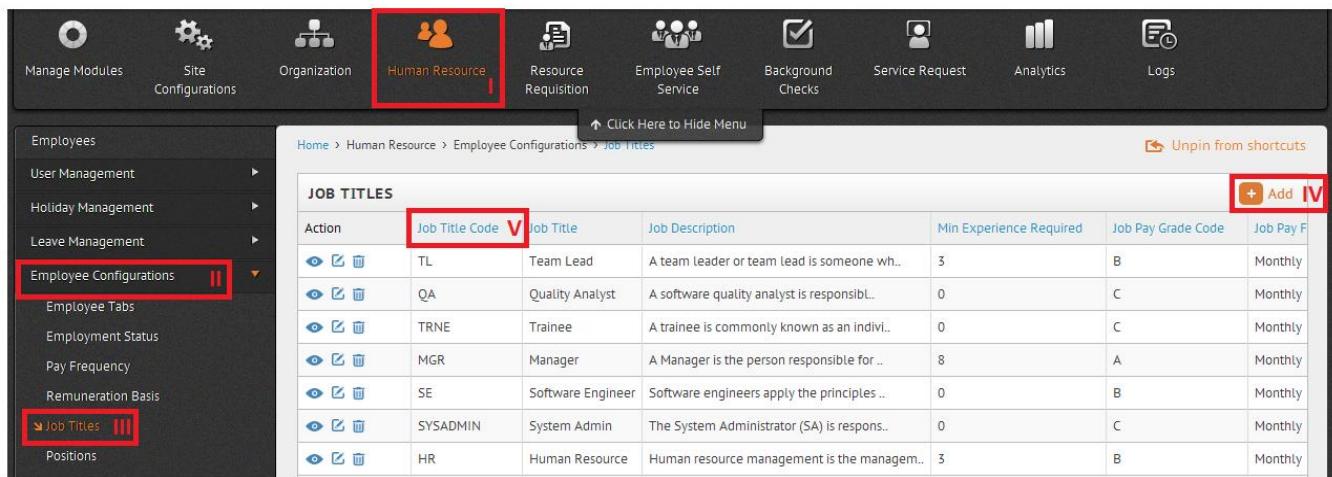
Note: You can only enter departments that are existing in the application

**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 69



Action	Job Title Code	Job Title	Job Description	Min Experience Required	Job Pay Grade Code	Job Pay F
	TL	Team Lead	A team leader or team lead is someone wh...	3	B	Monthly
	QA	Quality Analyst	A software quality analyst is responsibl...	0	C	Monthly
	TRNE	Trainee	A trainee is commonly known as an indivi...	0	C	Monthly
	MGR	Manager	A Manager is the person responsible for ..	8	A	Monthly
	SE	Software Engineer	Software engineers apply the principles ..	0	B	Monthly
	SYSADMIN	System Admin	The System Administrator (SA) is respons..	0	C	Monthly
	HR	Human Resource	Human resource management is the managem..	3	B	Monthly

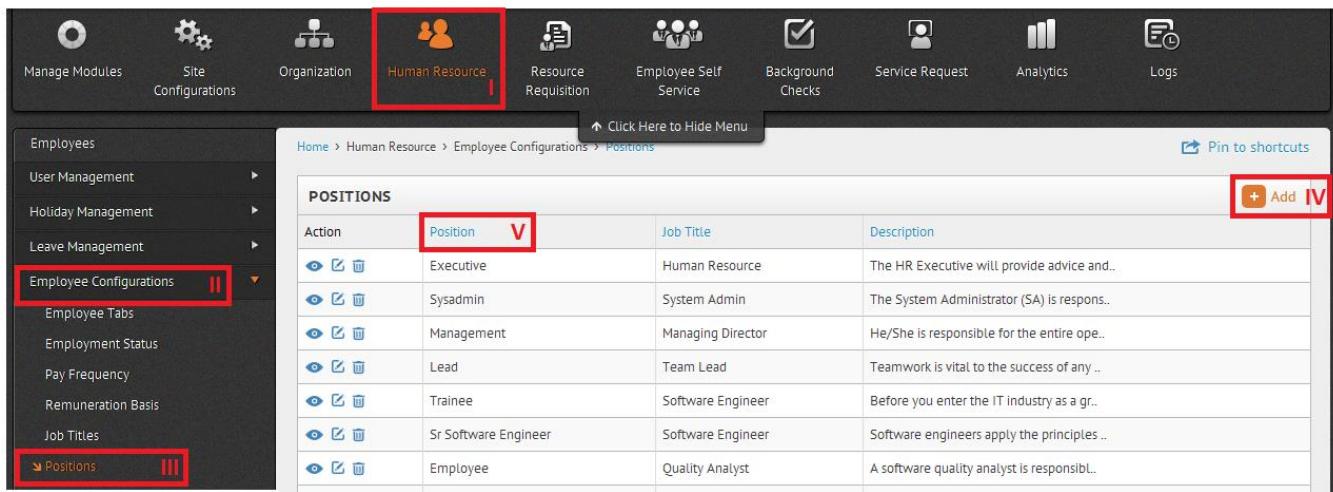
Figure 69

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 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 70



Action	Position	Job Title	Description
	Executive	Human Resource	The HR Executive will provide advice and..
	Sysadmin	System Admin	The System Administrator (SA) is respons..
	Management	Managing Director	He/She is responsible for the entire ope..
	Lead	Team Lead	Teamwork is vital to the success of any ..
	Trainee	Software Engineer	Before you enter the IT industry as a gr..
	Sr Software Engineer	Software Engineer	Software engineers apply the principles ..
	Employee	Quality Analyst	A software quality analyst is responsibl..

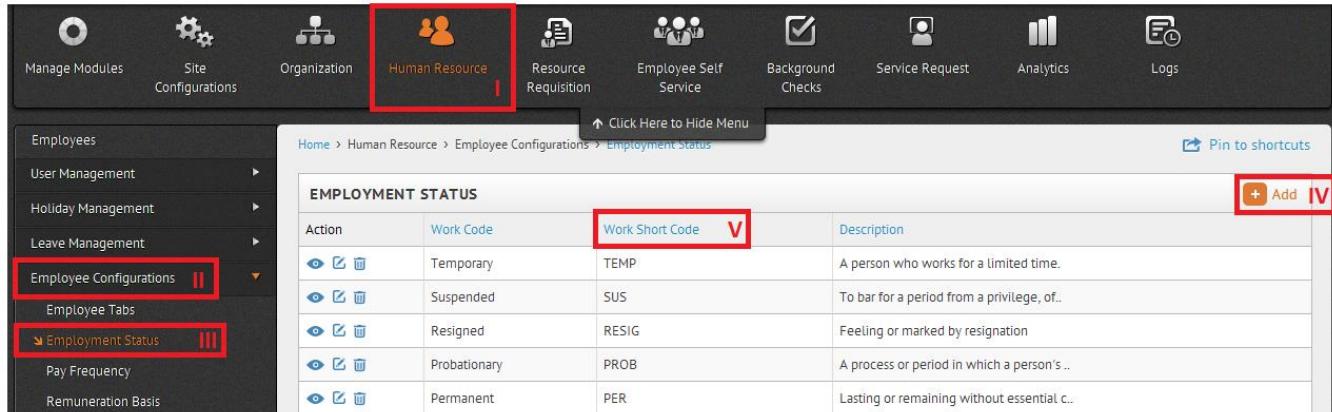
Figure 70

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 71



EMPLOYMENT STATUS			
Action	Work Code	Work Short Code	Description
	Temporary	TEMP	A person who works for a limited time.
	Suspended	SUS	To bar for a period from a privilege, of..
	Resigned	RESIG	Feeling or marked by resignation
	Probationary	PROB	A process or period in which a person's..
	Permanent	PER	Lasting or remaining without essential c..

Figure 71

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 72 for guidance

K	L	M
Employment Status	Date of joining	Date of leaving
	20-12-2014	
	20-12-2014	

Figure 72

**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 73

K	L	M
Date of joining	Date of leaving	Experience

Figure 73

**m. Enter the employee Experience**

- I. This field is not mandatory

Refer Figure 74

L	M	N
Date of leaving	Experience	Extension

Figure 74

**n. Enter the employee Extension**

- I. This field is not mandatory

Refer Figure 75

M	N	O
xperience	Extension	Work tele

Figure 75

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

- #### I. This field is not mandatory

Refer Figure 76

Extension	Work telephone number	Fax
-----------	-----------------------	-----

Figure 76

**p. Enter the employee Fax**

- This field is not mandatory

Refer Figure 77

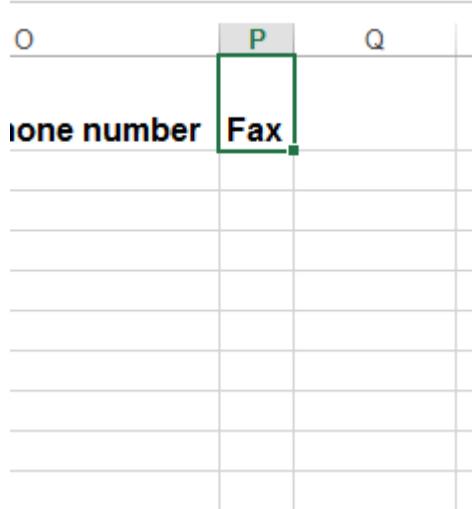
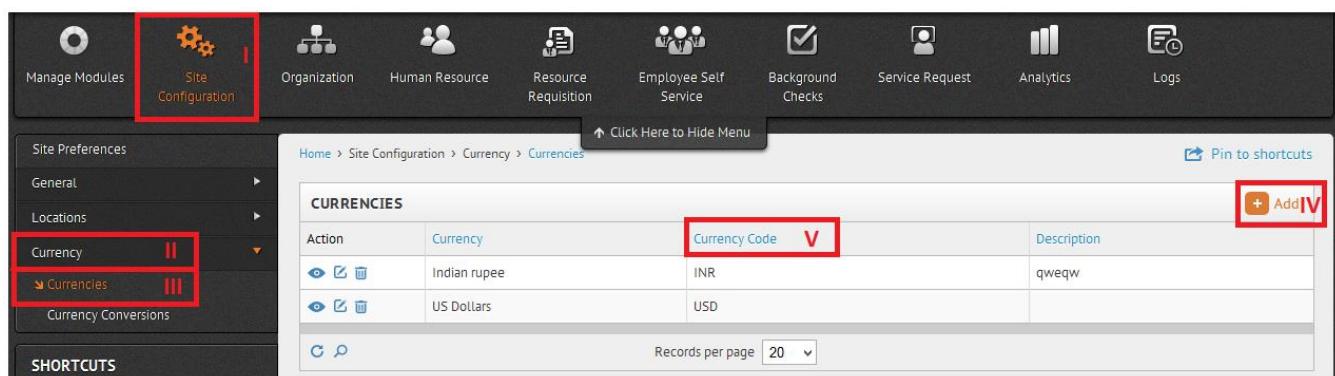


Figure 77

**q. Salary Currency**

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

Refer Figure 78



Action	Currency	Currency Code	Description
	Indian rupee	INR	qweww
	US Dollars	USD	

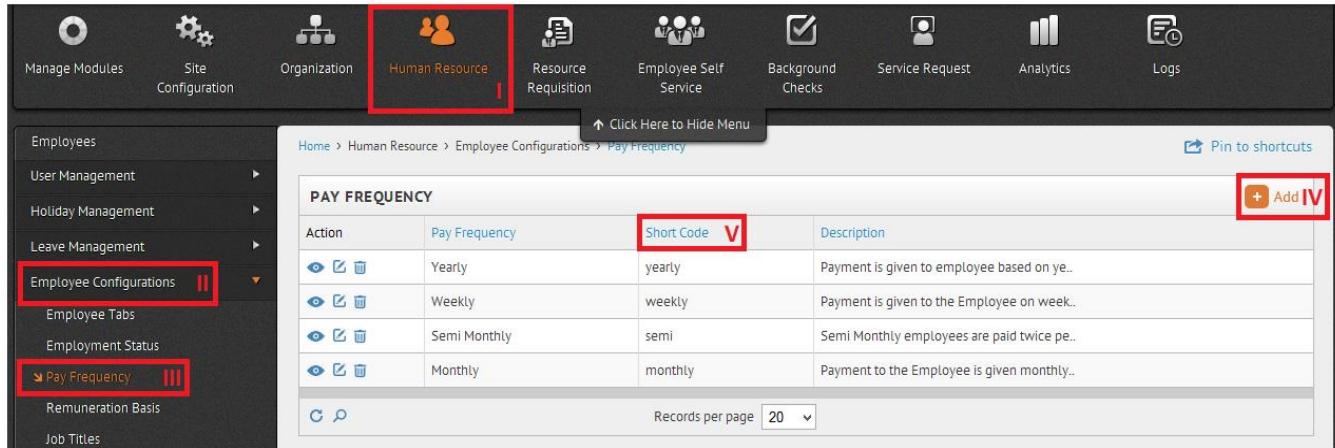
Figure 78

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 79



Action	Pay Frequency	Short Code	Description
Eye icon	Yearly	yearly	Payment is given to employee based on ye..
Eye icon	Weekly	weekly	Payment is given to the Employee on week..
Eye icon	Semi Monthly	semi	Semi Monthly employees are paid twice pe..
Eye icon	Monthly	monthly	Payment to the Employee is given monthly..

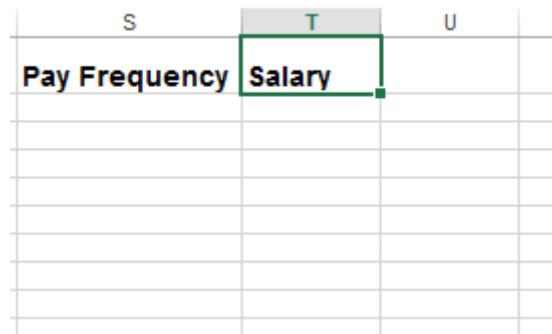
Figure 79

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 80



S	T	U
Pay Frequency	Salary	

Figure 80