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# Introduction

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

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

## Prerequisite Skills

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

## How to Use This Guide

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

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

# 1. Getting Started

## 1.1 What are the roles available in Sentrifugo?

### 1.1.1 Super Admin

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

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



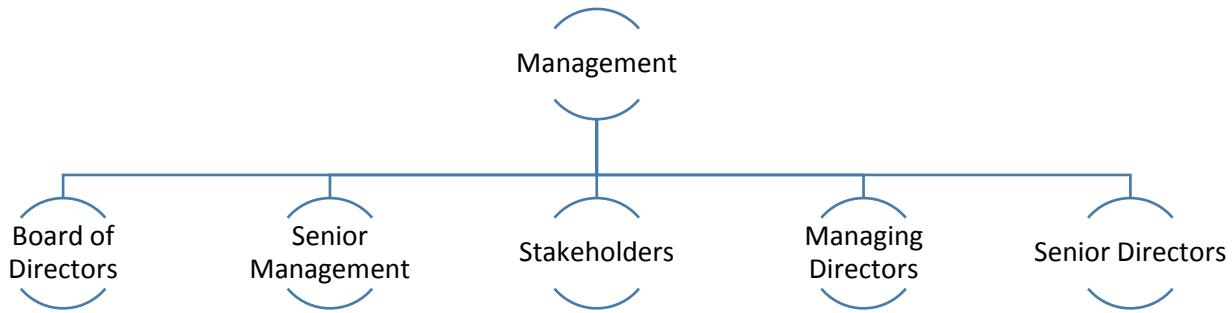
Since the Super Admin will not be included in the employee's list, he/she will not be able to perform employee actions like raising a leave request, service request, submitting timesheets etc. You can add another employee to Sentrifugo for the Super Admin user, with his/her actual details like Name,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

### 1.1.2 Default Role Groups in Sentrifugo

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

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

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



## 1.2 How do I log in to Sentrifugo?

### 1.2.1 Super Admin

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

*Please refer Figure 1.*



Figure 1

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

Super Admin receives the below email:

Please refer Figure 2.

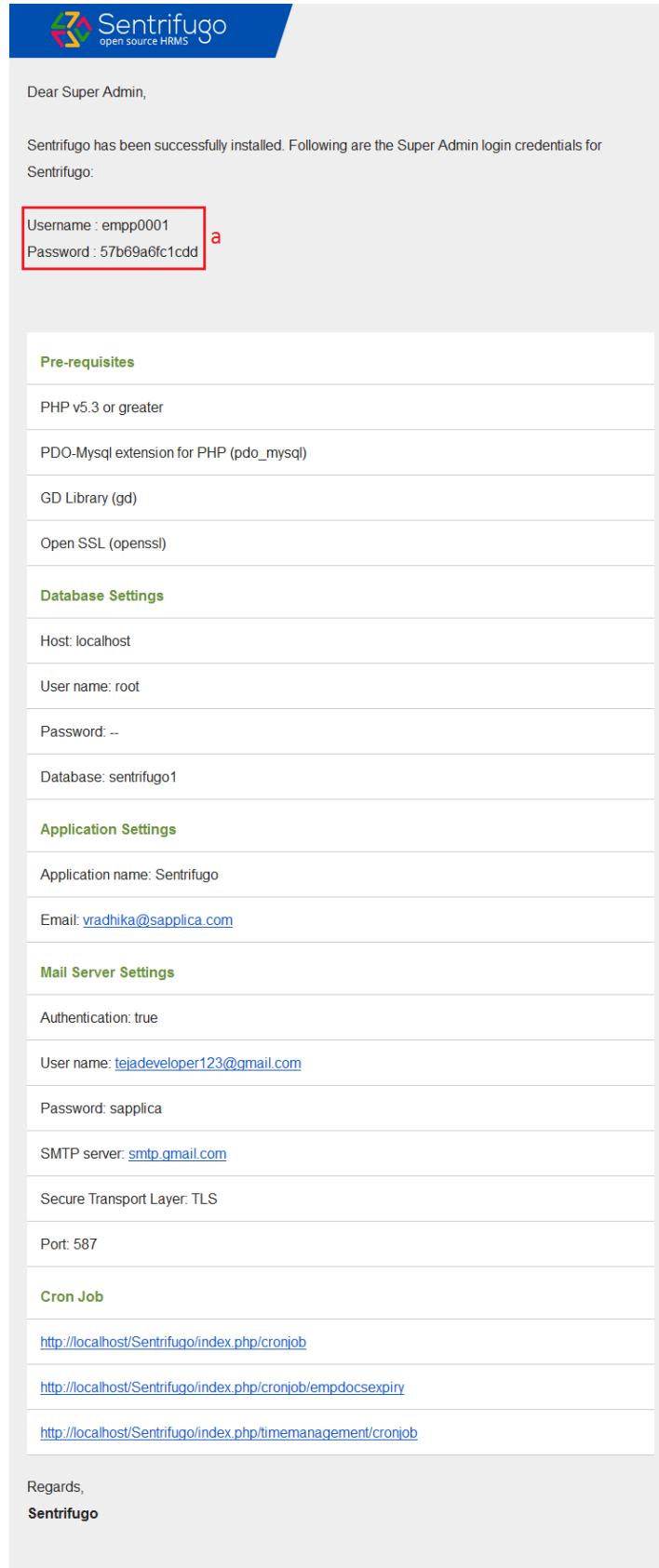


Figure 2

### 1.2.2 Employees/Users

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

*Please refer Figure 3.*

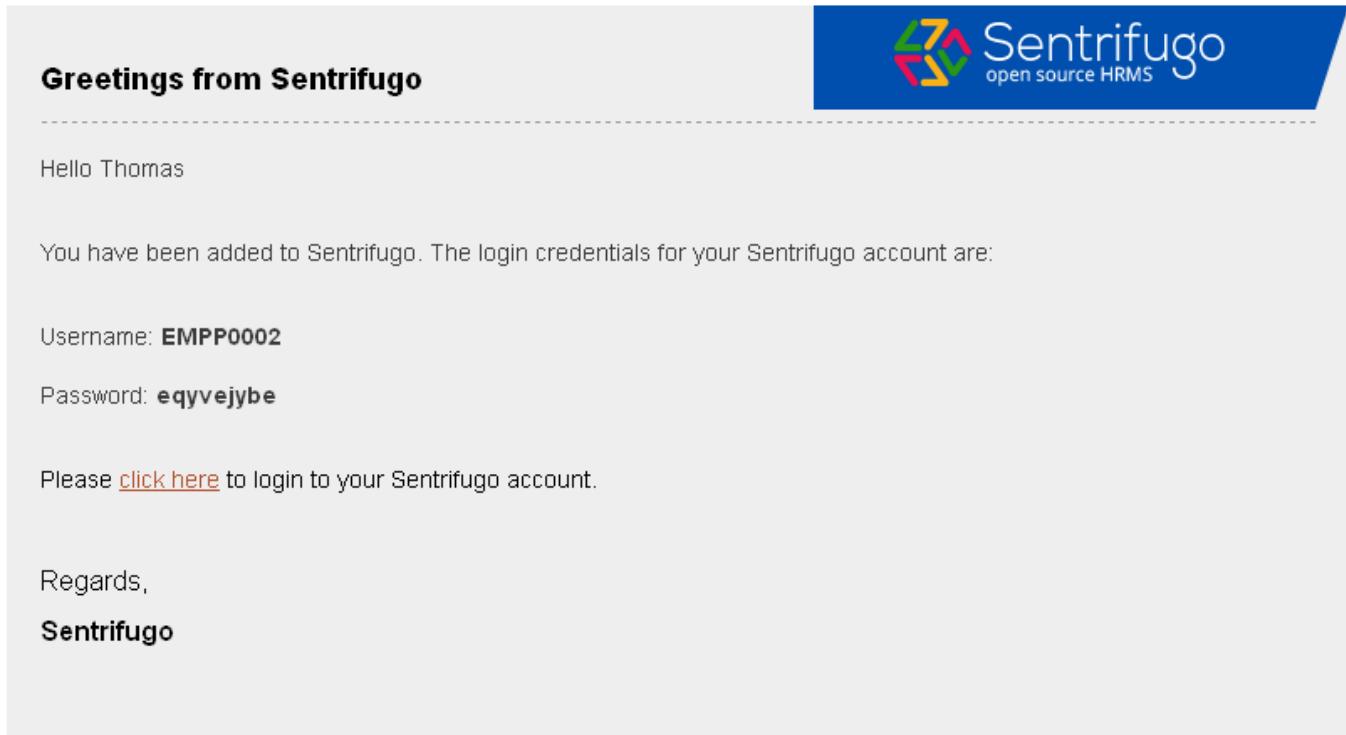
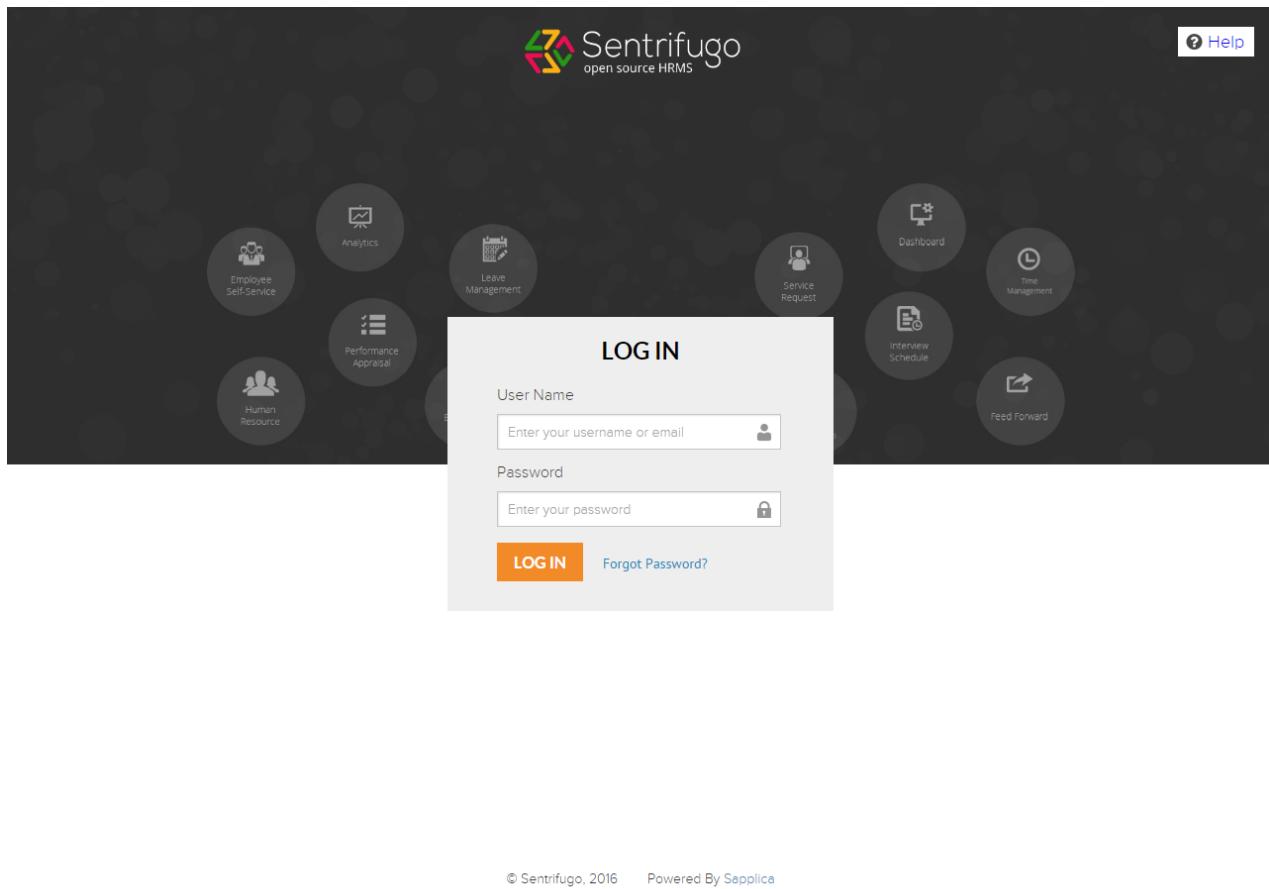


Figure 3

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



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

## 1.3 How do I set up Sentrifugo?

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

### 1.3.1 Configuration Wizard

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

Information is gathered in 5 steps.

## Step 1: Modules

Please refer Figure 4.

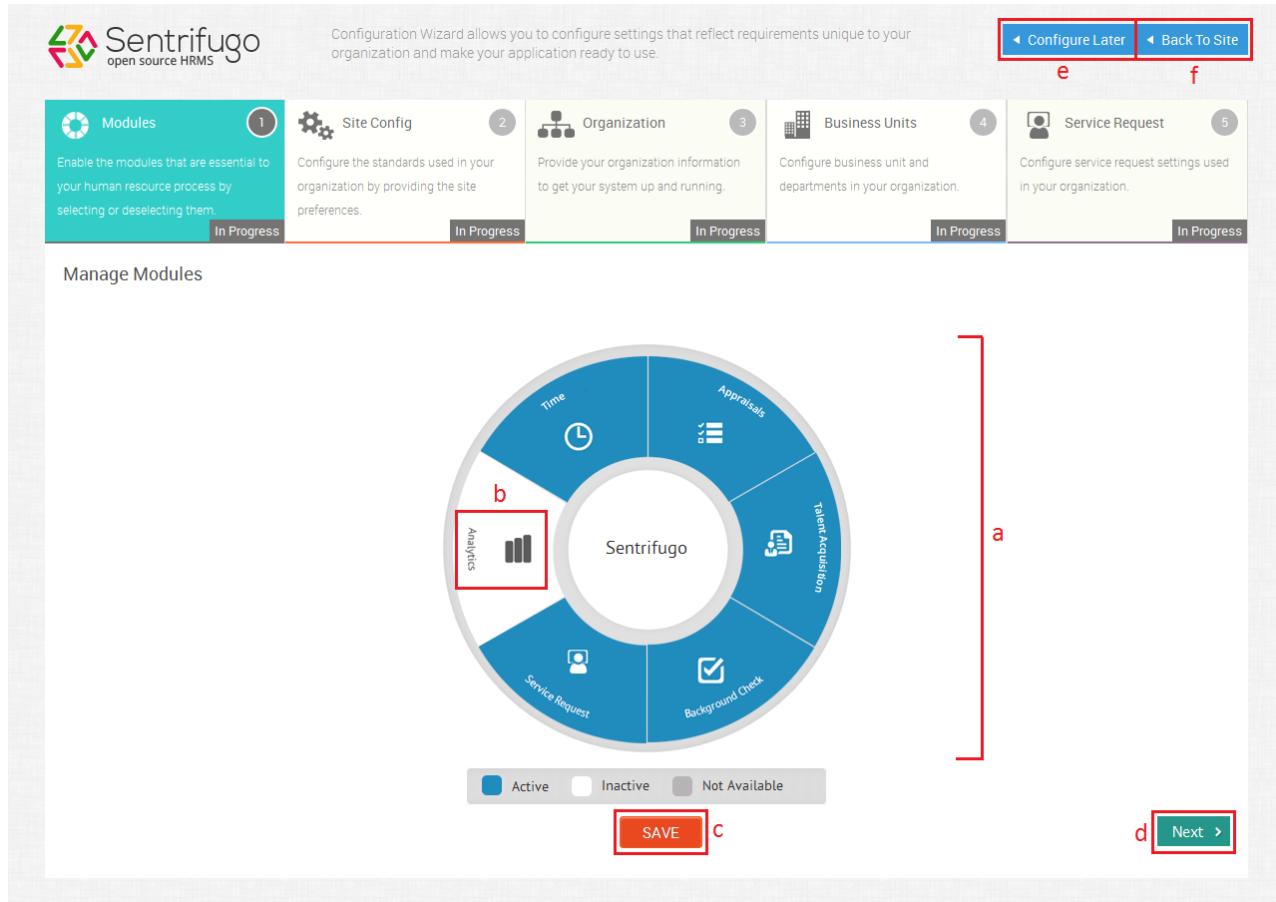


Figure 4

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

## Step 2: Site Config

Please refer Figure 5.

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

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

 Modules	 Site Config (2)	 Organization (3)	 Business Units (4)	 Service Request (5)
Enable the modules that are essential to your human resource process by selecting or deselecting them.	Configure the standards used in your organization by providing the site preferences.	Provide your organization information to get your system up and running.	Configure business unit and departments in your organization.	Configure service request settings used in your organization.
<b>Completed</b>	<b>In Progress</b>	<b>In Progress</b>	<b>In Progress</b>	<b>In Progress</b>

**Site Configuration**

Employee Code ? \*

Currency ? \*

Date Format ? \*

Time Format ? \*

Default Time Zone ? \*

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

Country ? \*

State ? \*

City ? \*

Default Password ? \*

Employment Status ? \*

**SAVE**

[◀ Prev](#)

[Next ▶](#)

Figure 5

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

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

### Step 3: Organization

*Please refer Figure 6.*

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

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

 <b>Modules</b> Enable the modules that are essential to your human resource process by selecting or deselecting them. <span style="background-color: #2e6b2e; color: white; padding: 2px 5px;">Completed</span>	 <b>Site Config</b> Configure the standards used in your organization by providing the site preferences. <span style="background-color: #2e6b2e; color: white; padding: 2px 5px;">Completed</span>	 <b>Organization</b> Provide your organization information to get your system up and running. <span style="background-color: #2e6b2e; color: white; padding: 2px 5px;">In Progress</span>	 <b>Business Units</b> Configure business unit and departments in your organization. <span style="background-color: #d9d9d9; color: #555; padding: 2px 5px;">In Progress</span>	 <b>Service Request</b> Configure service request settings used in your organization. <span style="background-color: #d9d9d9; color: #555; padding: 2px 5px;">In Progress</span>
---	---	--	---	---

**Configure Organization Information**

Organization ? \*

Website ? \*

Organization Started On ?

Total Employees ? \*

Primary Phone Number ?

Secondary Phone Number ?

Fax Number ?

Country ? \*

State ? \*

City ? \*

Main Branch Address ?

Address 1 ?

Address 2 ?

Organization Description ?

Upload Organization Logo ?  
  
265px X 40px  
Upload Logo

Business Domain ?

SAVE

< Prev

Next >

Figure 6

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

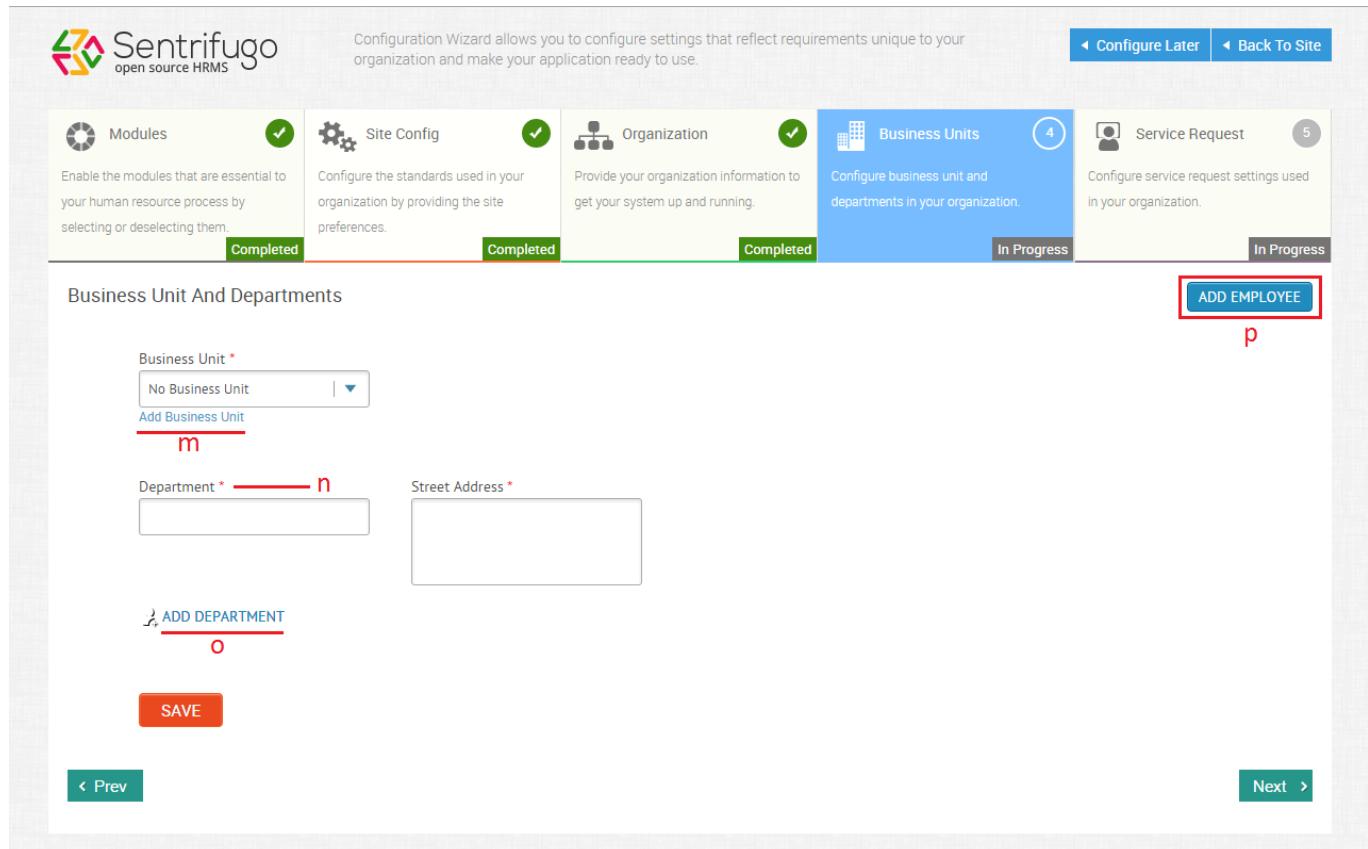
After saving your organization's details, an **ADD Employee** button will appear on the top right corner of the configuration wizard screen. However, it is not mandatory to add an employee in this step, you can even add an employee after the entire configuration is completed.

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

#### Step 4: Business Units

You can create business units and departments here.

Please refer Figure 7.



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

**Business Unit And Departments**

Business Unit \*

No Business Unit | ▾

Add Business Unit  
**m**

Department \* **n**

Street Address \*

**o**

**ADD DEPARTMENT**

**SAVE**

**ADD EMPLOYEE** **p**

**Configure Later** **Back To Site**

Figure 7

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

## Step 5: Service Request

Please refer Figure 8.

Sentrifugo open source HRMS

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

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

 Modules <span style="color: green;">✓</span>	Site Config <span style="color: green;">✓</span>	 Organization <span style="color: green;">✓</span>	Business Units <span style="color: green;">✓</span>	 Service Request <span style="color: green;">5</span>
Enable the modules that are essential to your human resource process by selecting or deselecting them.	Configure the standards used in your organization by providing the site preferences.	Provide your organization information to get your system up and running.	Configure business unit and departments in your organization.	Configure service request settings used in your organization.
<span style="background-color: #2e6b2e; color: white; padding: 2px 5px;">Completed</span>	<span style="background-color: #2e6b2e; color: white; padding: 2px 5px;">Completed</span>	<span style="background-color: #2e6b2e; color: white; padding: 2px 5px;">Completed</span>	<span style="background-color: #2e6b2e; color: white; padding: 2px 5px;">Completed</span>	<span style="background-color: #2e6b2e; color: white; padding: 2px 5px;">In Progress</span>

Service Request Categories And Requests

[ADD EMPLOYEE](#)

Category \* Select Category | ▾  
[Add Category](#)

Request Type \* r

Description  
200 characters remaining (200 maximum)

[ADD REQUEST TYPE](#)

q r s

SAVE

[◀ Prev](#)

Figure 8

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

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



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

## 1.4 How do I add Employees to Sentrifugo?

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



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

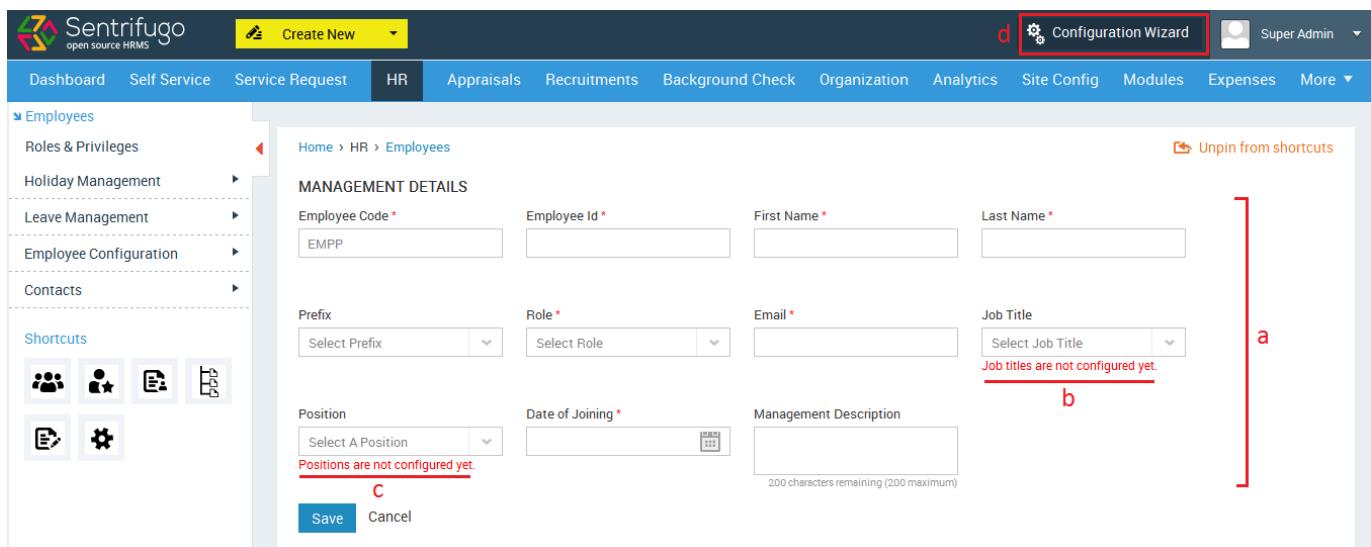


While adding employees ensure that they align with the hierarchy of your organization (top down approach). Reporting manager is a mandatory field, while adding employees.

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

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

Please refer Figure 9.



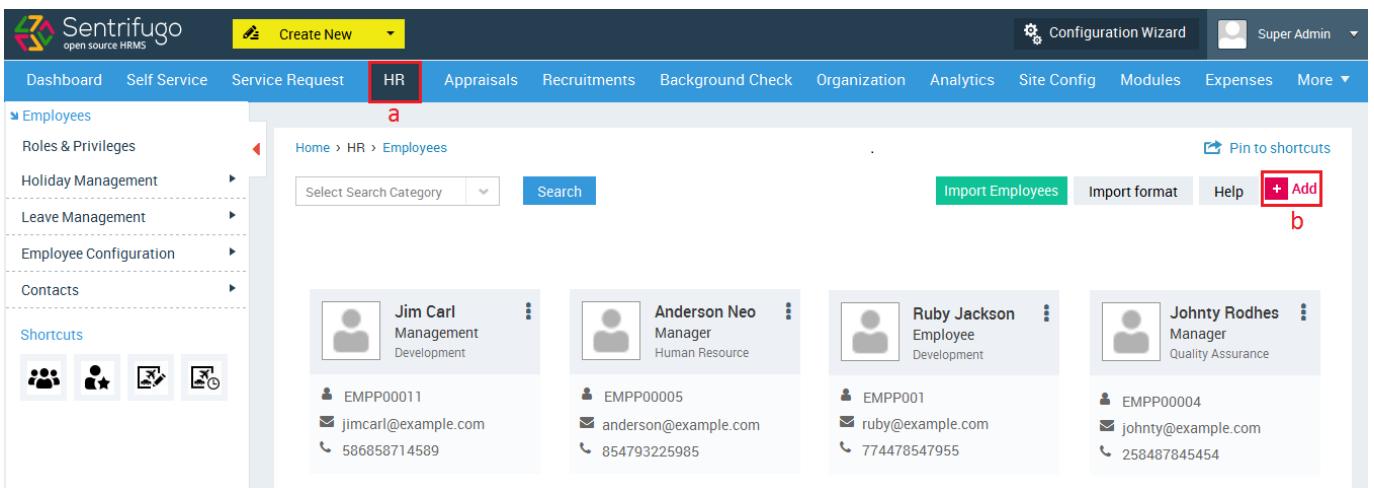
The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes 'Create New' (highlighted with a yellow box), 'Configuration Wizard' (highlighted with a red box 'd'), and a user dropdown for 'Super Admin'. The main menu has tabs for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. On the left, a sidebar for 'Employees' lists Roles & Privileges, Holiday Management, Leave Management, Employee Configuration, and Contacts. Under 'Shortcuts', there are icons for users, roles, employees, and HR. The central content area shows the 'Employees' management details form. It has fields for Employee Code (EMPP), Employee Id, First Name, Last Name, Prefix, Role, Email, Job Title, Position, Date of Joining, and Management Description. Error messages 'Positions are not configured yet.' and 'Job titles are not configured yet.' are displayed next to their respective dropdowns. Buttons for 'Save' (highlighted with a red box 'c') and 'Cancel' are at the bottom. A red bracket 'a' spans from the sidebar to the right edge of the form area.

Figure 9

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

#### 1.4.2 Adding Other Employees

Please refer Figure 10.



The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (which is highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. A sidebar on the left contains links for Employees, Roles & Privileges, Holiday Management, Leave Management, Employee Configuration, Contacts, and Shortcuts, each with a small icon. The main content area displays a list of employees with their names, roles, and contact information. At the top of this list area, there is a search bar, a 'Select Search Category' dropdown, and a 'Search' button. On the right side of the list, there are buttons for 'Import Employees', 'Import format', 'Help', and a red-bordered '+Add' button. The employee list includes four entries:

- Jim Carl (Management Development) - Employee ID: EMPP00011, Email: jimcarl@example.com, Phone: 586858714589
- Anderson Neo (Manager Human Resource) - Employee ID: EMPP00005, Email: anderson@example.com, Phone: 854793225985
- Ruby Jackson (Employee Development) - Employee ID: EMPP001, Email: ruby@example.com, Phone: 774478547955
- Johny Rodhes (Manager Quality Assurance) - Employee ID: EMPP0004, Email: johny@example.com, Phone: 258487845454

Figure 10

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

Please refer Figure 11.

Home > HR > Employees > Add

<b>Official</b>  Documents  Leaves  Holidays  Salary  Personal  Contact  Skills  Job History  Experience  Education  Training & Certification  Medical Claims  Disability  Dependency  Visa and Immigration  Corporate Card  Work Eligibility  Additional Details	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> Employee Code *  <input type="text" value="empp"/> </div> <div style="width: 45%;"> Employee Id *  <input type="text"/> <span style="border: 2px solid red; padding: 2px;">C</span> </div> </div> <div style="margin-top: 10px;"> <div style="display: flex; justify-content: space-between;"> <div style="width: 33%;"> First Name *  <input type="text"/> </div> <div style="width: 33%;"> Last Name *  <input type="text"/> </div> <div style="width: 33%;"> Mode of Employment *  <input type="text" value="Direct"/> </div> </div> <div style="margin-top: 10px;"> <div style="display: flex; justify-content: space-between;"> <div style="width: 33%;"> Role *  <input type="text" value="Select Role"/> </div> <div style="width: 33%;"> Email *  <input type="text"/> </div> <div style="width: 33%;"> Business Unit  <input type="text" value="No Business Unit"/> </div> </div> <div style="margin-top: 10px;"> <div style="display: flex; justify-content: space-between;"> <div style="width: 33%;"> Department <small>?</small> *  <input type="text" value="Select Department"/> </div> <div style="width: 33%;"> Reporting Manager *  <input type="text" value="Select Reporting Manager"/> </div> <div style="width: 33%;"> Job Title  <input type="text" value="Select Job Title"/> </div> </div> <div style="margin-top: 10px;"> <div style="display: flex; justify-content: space-between;"> <div style="width: 33%;"> Position <small>?</small>  <input type="text" value="Select Position"/> </div> <div style="width: 33%;"> Employment Status *  <input type="text" value="Select Employment Status"/> </div> <div style="width: 33%;"> Date of Joining <small>?</small> *  <input type="text"/> <span style="border: 1px solid #ccc; padding: 2px;">d</span> </div> </div> <div style="margin-top: 10px;"> <div style="display: flex; justify-content: space-between;"> <div style="width: 33%;"> Date of Leaving <small>?</small>  <input type="text"/> </div> <div style="width: 33%;"> Years of Experience  <input type="text"/> </div> <div style="width: 33%;"> Work Telephone Number  <input type="text"/> </div> </div> <div style="margin-top: 10px;"> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> Extension  <input type="text"/> </div> <div style="width: 45%;"> Fax  <input type="text"/> </div> </div> <div style="text-align: center; margin-top: 10px;"> <span style="border: 1px solid blue; padding: 2px; border-radius: 5px; color: blue; font-weight: bold;">e</span> <b>Save</b>   <a href="#">Cancel</a> </div> </div> </div></div></div></div></div>
---	---

Figure 11

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



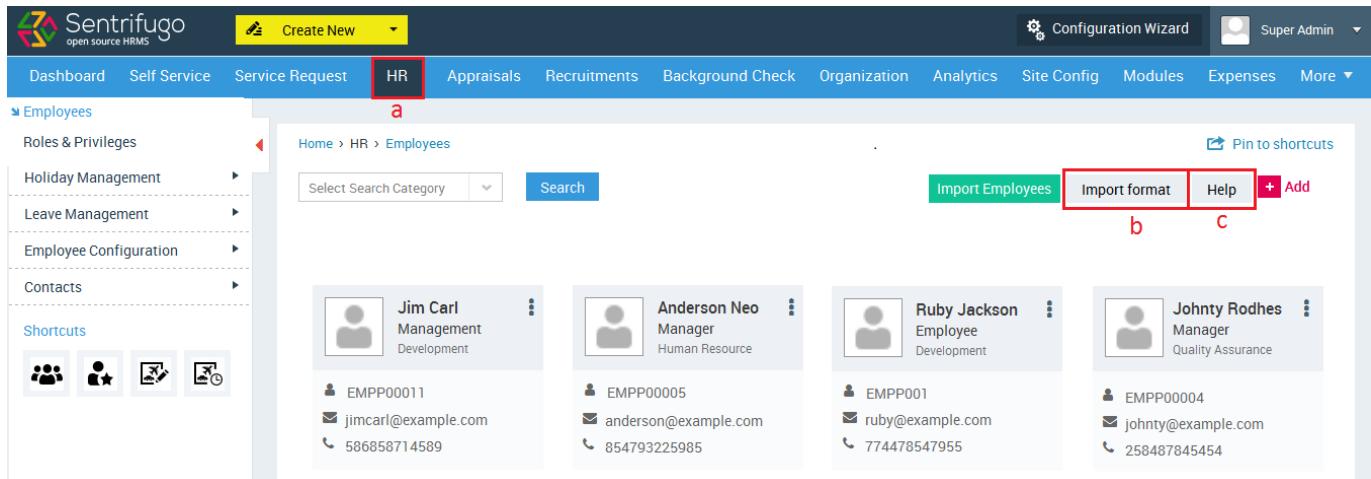
Only the Super Admin's ID number will be fixed as 0001. All the other Employees including the Organization Head can have customized employee ID numbers. For example:

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

### 1.4.3 Adding Employees in Bulk

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

Please refer Figure 12.

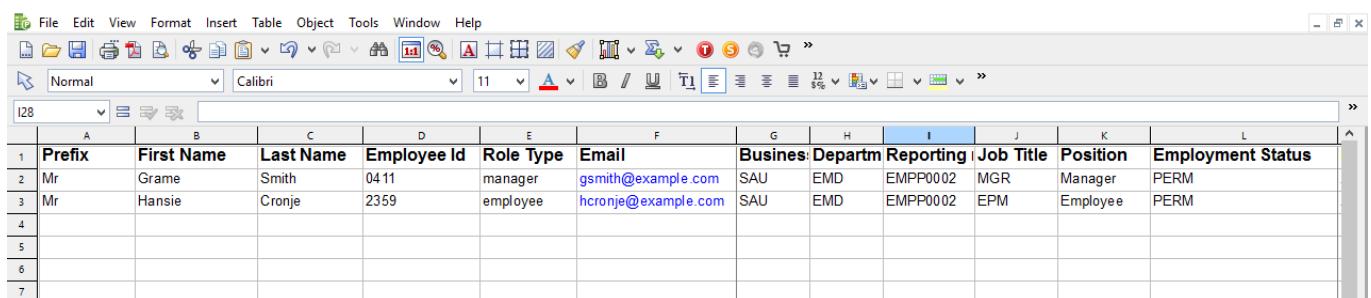


The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes 'Create New', 'Configuration Wizard', 'Super Admin', and various menu items like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. The 'HR' menu item is highlighted with a red box and labeled 'a'. Below the navigation is a sidebar with links for Employees, Roles & Privileges, Holiday Management, Leave Management, Employee Configuration, Contacts, and Shortcuts. The main content area displays a grid of employee profiles. Each profile card includes a small photo, the employee's name, their role, and department, along with their ID, email, and phone number. To the right of the grid are three buttons: 'Import Employees' (green), 'Import format' (red box, labeled 'b'), and 'Help' (pink). A red box labeled 'c' also covers the 'Help' link. The URL in the browser address bar is 'http://..(your domain name)..../(your application name)..../index.php/cronjob'.

Figure 12

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

Please refer Figure 13 to view the Import Format.



	A	B	C	D	E	F	G	H	I	J	K	L
1	Prefix	First Name	Last Name	Employee Id	Role Type	Email	Business	Departm	Reporting	Job Title	Position	Employment Status
2	Mr	Grame	Smith	0411	manager	gsmith@example.com	SAU	EMD	EMPP0002	MGR	Manager	PERM
3	Mr	Hansie	Cronje	2359	employee	hcronje@example.com	SAU	EMD	EMPP0002	EPM	Employee	PERM
4												
5												
6												
7												

Figure 13

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

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

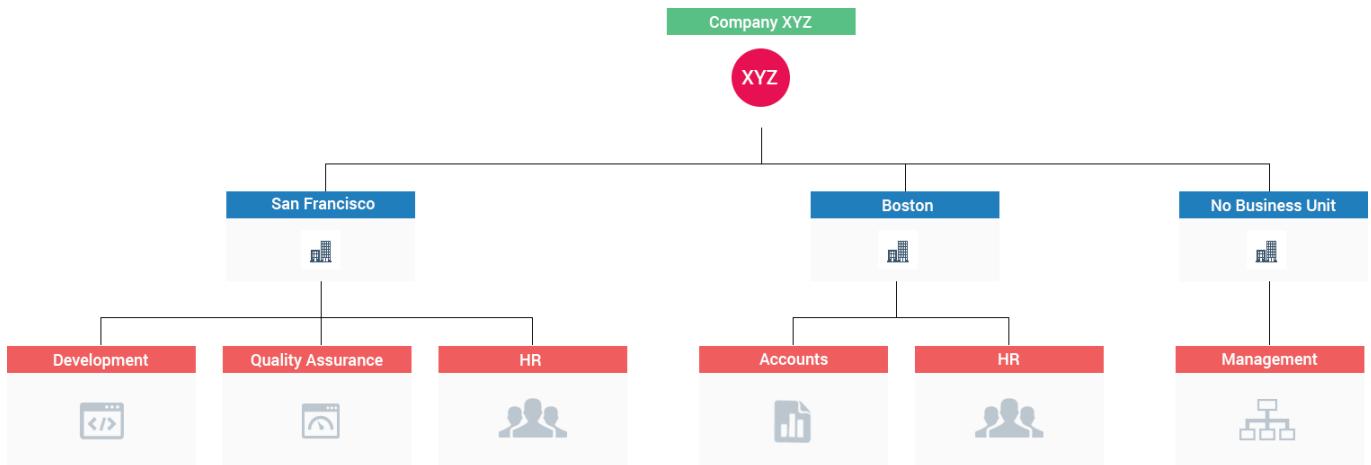
For example: <http://example.com/sentrifugo/index.php/cronjob>



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

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

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



### 1.5.1 Adding Business Units

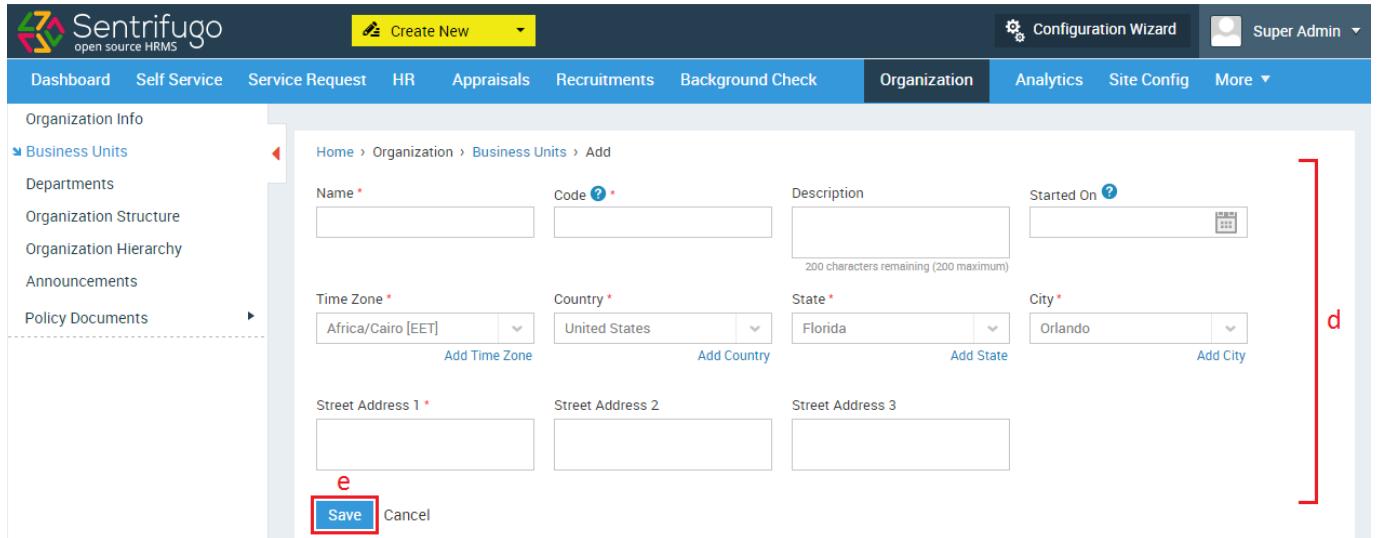
Please refer Figure 14.

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

Figure 14

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

Please refer Figure 15.



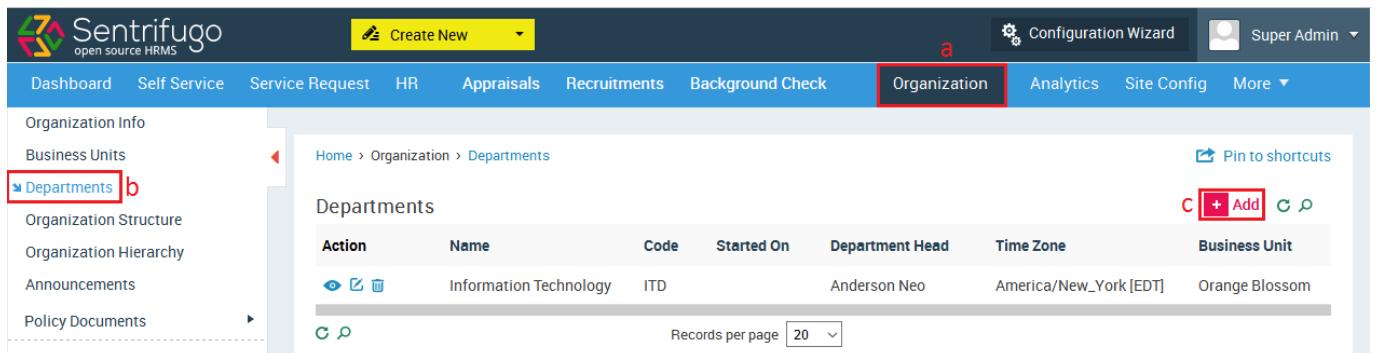
The screenshot shows the Sentrifugo application interface for adding a new Business Unit. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization (highlighted), Analytics, Site Config, and More. On the left, a sidebar lists Organization Info, Business Units (highlighted), Departments, Organization Structure, Organization Hierarchy, Announcements, and Policy Documents. The main content area displays a form with fields for Name, Code, Description, Started On, Time Zone, Country, State, City, Street Address 1, Street Address 2, and Street Address 3. The 'Save' button at the bottom left is highlighted with a red box and labeled 'e'. A red bracket labeled 'd' points to the right edge of the form area.

Figure 15

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

### 1.5.2 Adding Departments

Please refer Figure 16.

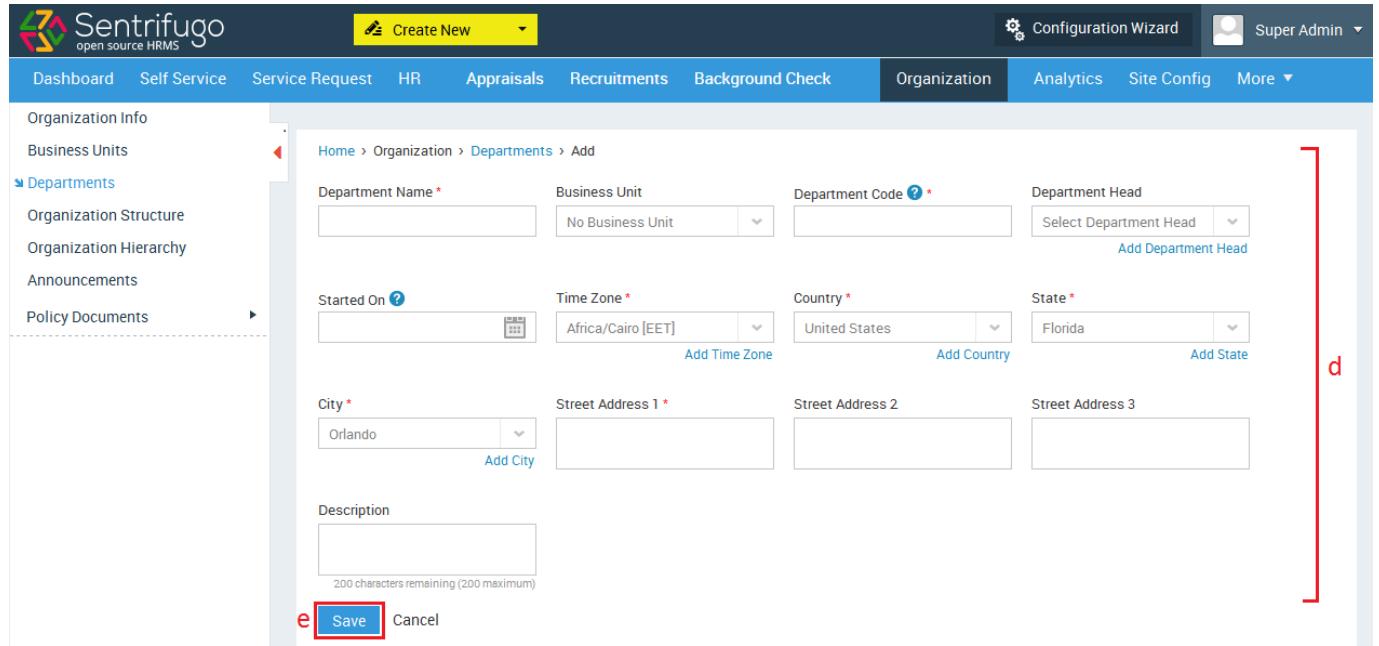


The screenshot shows the Sentrifugo application interface for managing departments. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization (highlighted), Analytics, Site Config, and More. On the left, a sidebar lists Organization Info, Business Units, Departments (highlighted), Organization Structure, Organization Hierarchy, Announcements, and Policy Documents. The main content area displays a table of departments with columns for Action, Name, Code, Started On, Department Head, Time Zone, and Business Unit. A new row for 'Information Technology' is listed with values ITD, Anderson Neo, America/New\_York [EDT], and Orange Blossom. The bottom right of the table has a 'Records per page' dropdown set to 20. A red box labeled 'a' highlights the 'Organization' tab. A red box labeled 'b' highlights the 'Departments' link in the sidebar. A red box labeled 'c' highlights the '+Add' button on the right side of the table.

Figure 16

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

Please refer Figure 17.



The screenshot shows the 'Organization' tab selected in the top navigation bar. The left sidebar has 'Departments' expanded, showing 'Organization Info', 'Business Units', 'Organization Structure', 'Organization Hierarchy', 'Announcements', and 'Policy Documents'. The main content area shows a form for adding a department. The form fields include:

- Department Name \***: Text input field.
- Business Unit**: A dropdown menu showing 'No Business Unit'.
- Department Code ? \***: Text input field.
- Department Head**: A dropdown menu showing 'Select Department Head' with a 'Add Department Head' link.
- Started On ?**: Date input field.
- Time Zone \***: A dropdown menu showing 'Africa/Cairo [EET]' with a 'Add Time Zone' link.
- Country \***: A dropdown menu showing 'United States' with a 'Add Country' link.
- State \***: A dropdown menu showing 'Florida' with a 'Add State' link.
- City \***: A dropdown menu showing 'Orlando' with an 'Add City' link.
- Street Address 1 \***: Text input field.
- Street Address 2**: Text input field.
- Street Address 3**: Text input field.
- Description**: Text area with a character limit of 200.

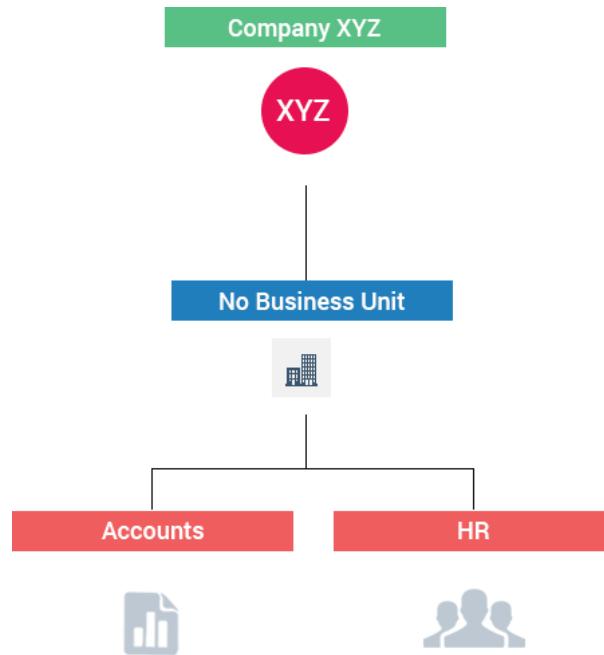
At the bottom are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red box and labeled 'e'. A red bracket labeled 'd' covers the right side of the form area.

Figure 17

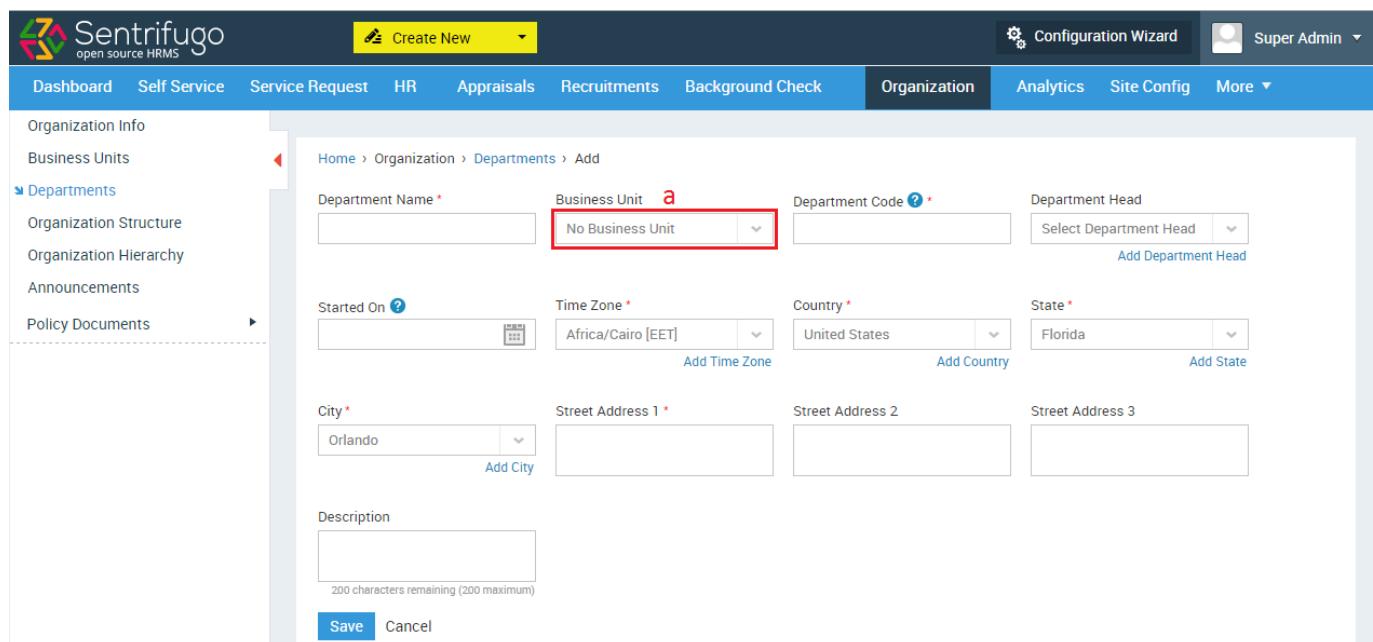
- d. Enter the necessary details
- e. Click **Save** button to create a new department

### 1.5.3 No Business Unit

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



Please refer Figure 18.



The screenshot shows the Sentrifugo web application's 'Organization' section. On the left, a sidebar lists 'Organization Info', 'Business Units', 'Departments' (which is selected), 'Organization Structure', 'Organization Hierarchy', 'Announcements', and 'Policy Documents'. The main content area has a breadcrumb navigation: Home > Organization > Departments > Add. The form fields include:

- Department Name \***: An input field.
- Business Unit**: A dropdown menu with an option 'No Business Unit' highlighted by a red border.
- Department Code ? \***: An input field.
- Department Head**: A dropdown menu with an option 'Select Department Head' and a 'Add Department Head' link.
- Started On**: A date picker.
- Time Zone \***: A dropdown menu with 'Africa/Cairo [EET]' selected.
- Country \***: A dropdown menu with 'United States' selected.
- State \***: A dropdown menu with 'Florida' selected.
- City \***: A dropdown menu with 'Orlando' selected.
- Street Address 1 \***: An input field.
- Street Address 2**: An input field.
- Street Address 3**: An input field.
- Description**: A text area with placeholder text '200 characters remaining (200 maximum)'.
- Save** and **Cancel** buttons at the bottom.

Figure 18

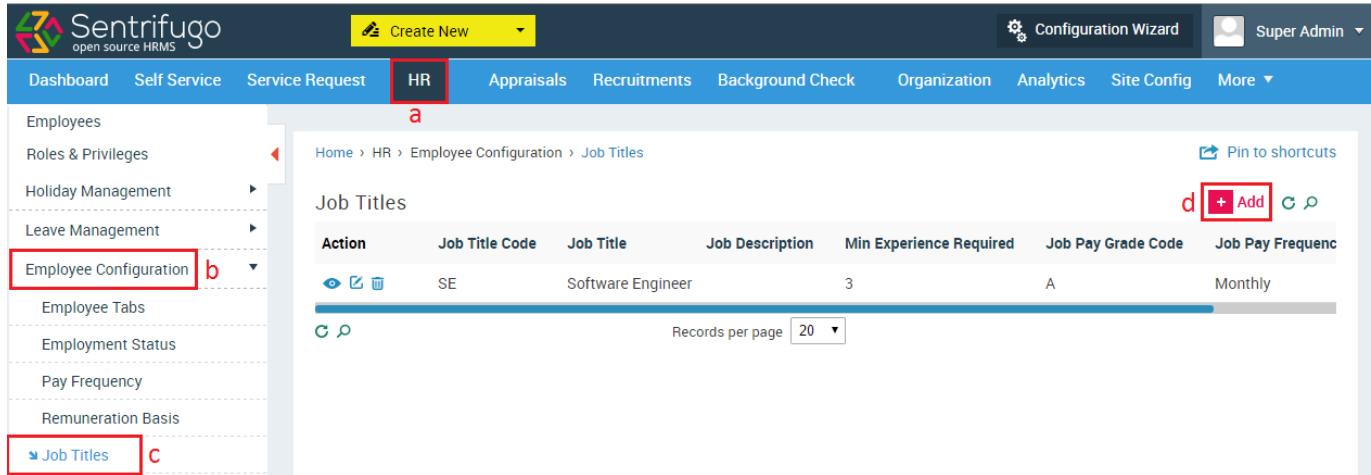
a. Select the option 'No Business Unit'

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

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

## 1.6.1 Adding Job Titles

Please refer Figure 19.



Action	Job Title Code	Job Title	Job Description	Min Experience Required	Job Pay Grade Code	Job Pay Frequency
	SE	Software Engineer		3	A	Monthly

Figure 19

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

Please refer Figure 20.

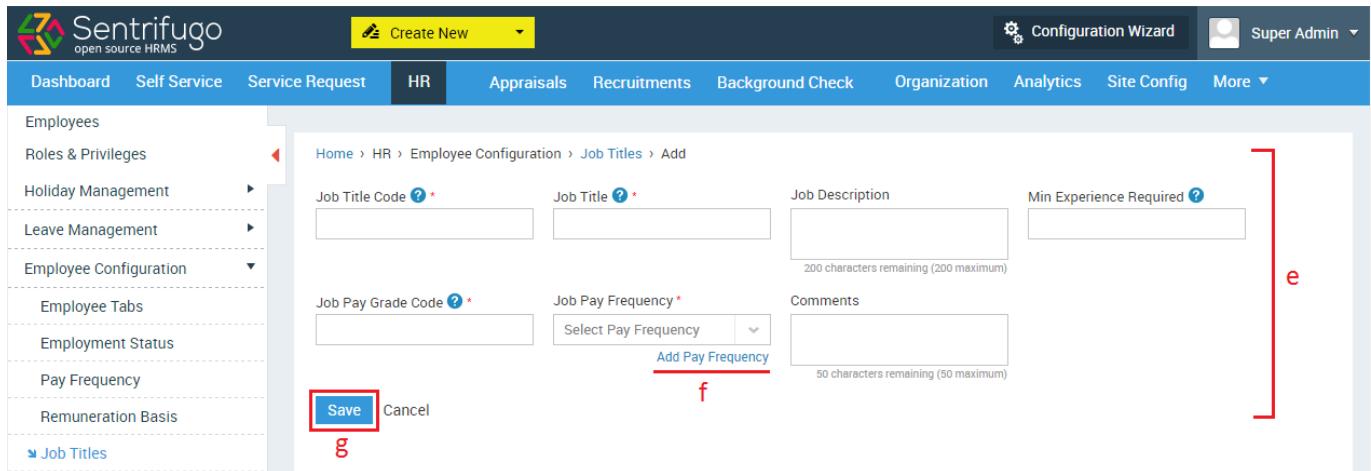
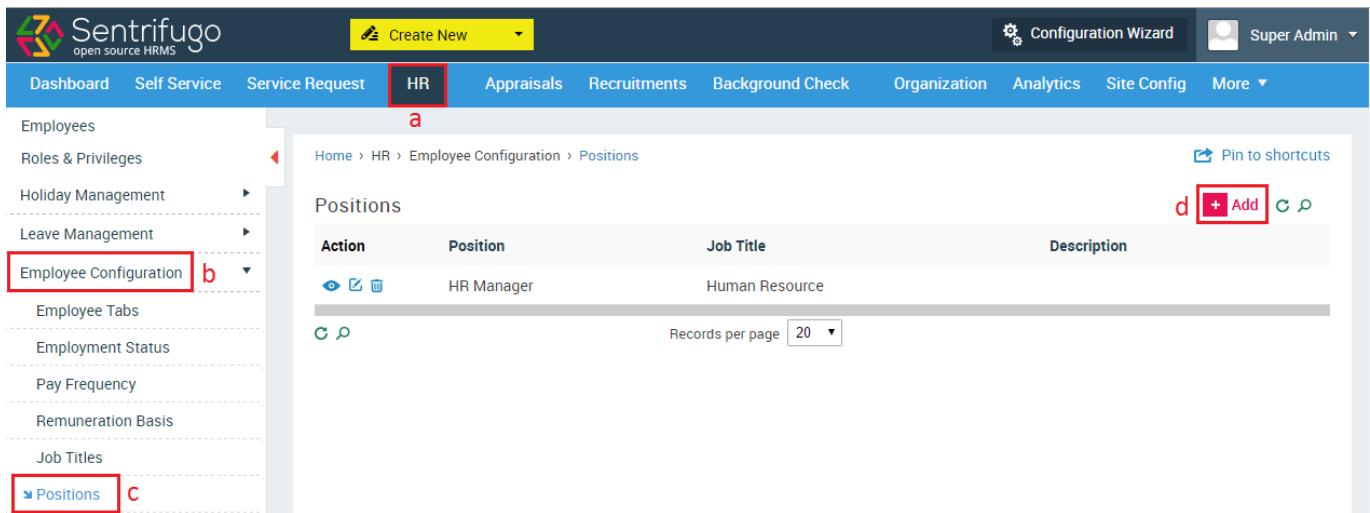


Figure 20

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

## 1.6.2 Adding Positions

Please refer Figure 21.

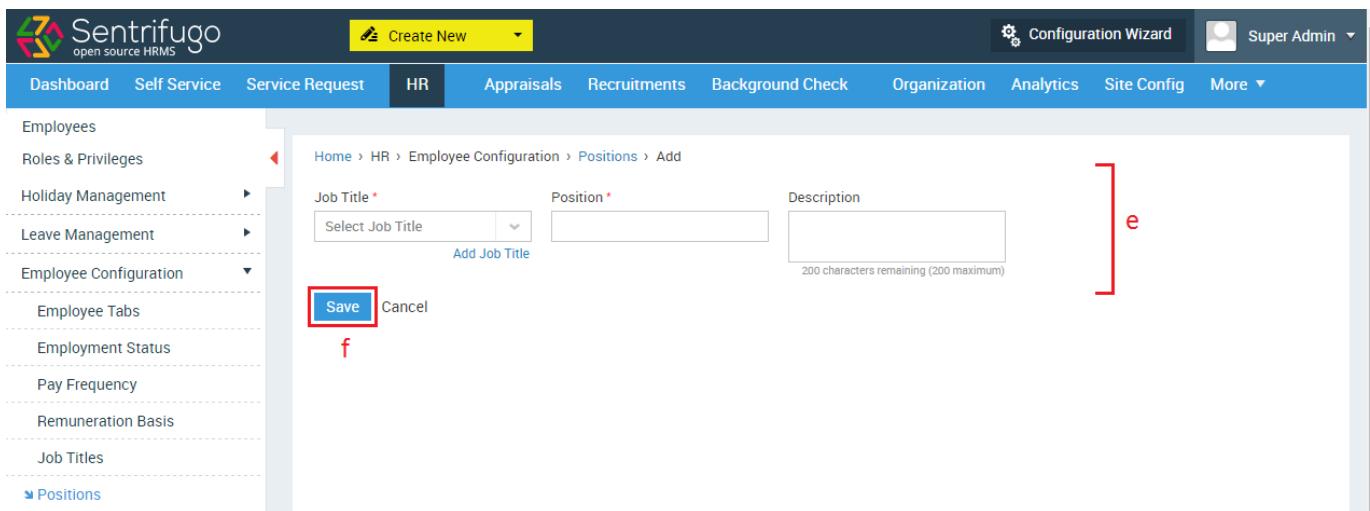


The screenshot shows the Sentrifugo HRM system interface. At the top, there's a navigation bar with links for Dashboard, Self Service, Service Request, HR (which is highlighted with a red box 'a'), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, More, Configuration Wizard, and Super Admin. On the left, a sidebar lists various management categories like Employees, Roles & Privileges, Holiday Management, Leave Management, Employee Configuration (which is expanded, with 'Employee Configuration' highlighted by red box 'b'), Employee Tabs, Employment Status, Pay Frequency, Remuneration Basis, Job Titles, and Positions (highlighted by red box 'c'). The main content area shows a list of positions with columns for Action, Position, Job Title, and Description. There's a 'Pin to shortcuts' link at the top right. Below the table, there are 'Records per page' dropdown and search/filter icons. A red box 'd' points to the '+Add' button in the top right corner of the main content area.

Figure 21

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

Please refer Figure 22.



The screenshot shows the 'Add Position' form. At the top, there's a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, More, Configuration Wizard, and Super Admin. On the left, a sidebar lists various management categories like Employees, Roles & Privileges, Holiday Management, Leave Management, Employee Configuration (expanded), Employee Tabs, Employment Status, Pay Frequency, Remuneration Basis, Job Titles, and Positions. The main content area shows a form for adding a position. It has fields for 'Job Title \*' (with a dropdown menu 'Select Job Title' and a 'Add Job Title' button), 'Position \*' (an input field), and 'Description' (a text area with a character limit of 200). A red box 'e' highlights the 'Job Title' field. A red box 'f' highlights the 'Save' button. A red bracket on the right side groups the 'Job Title' and 'Position' fields.

Figure 22

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



You can create a Position only after creating a Job Title

## 2. Dashboard

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

### 2.1 How do I add Widgets?

Please refer Figure 23.

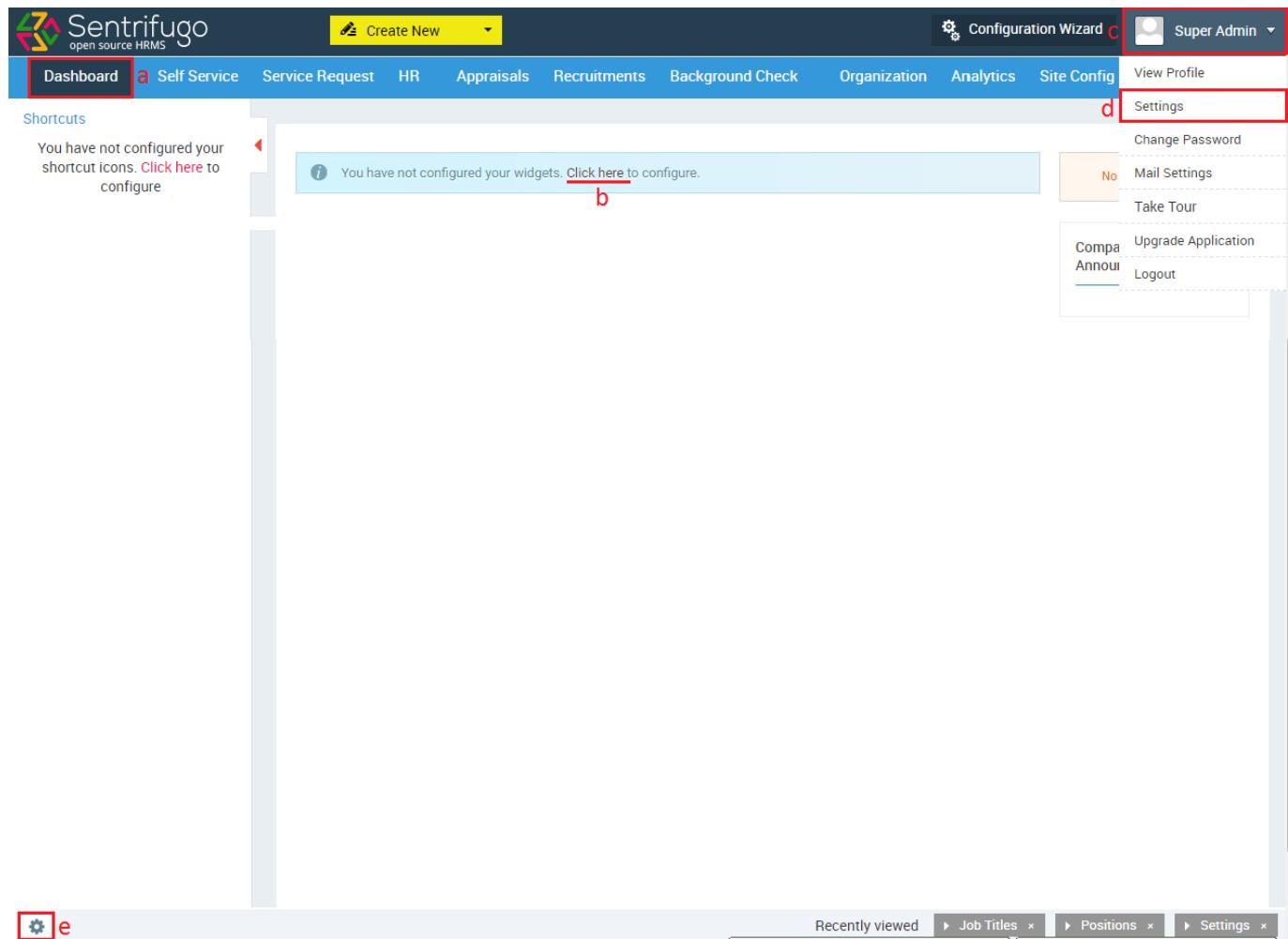


Figure 23

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

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

Or

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

Or

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

Please refer Figure 24.

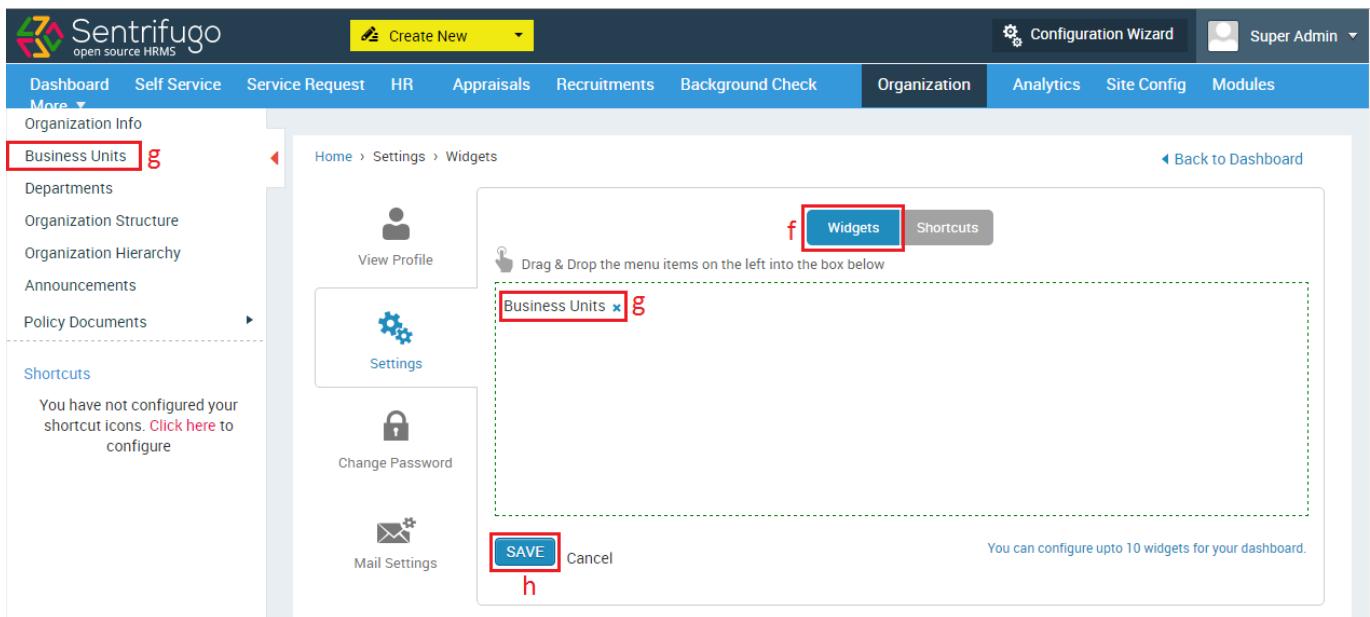


Figure 24

**(Common for all)**

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

## 2.2 How do I add Shortcuts?

Please refer Figure 25.

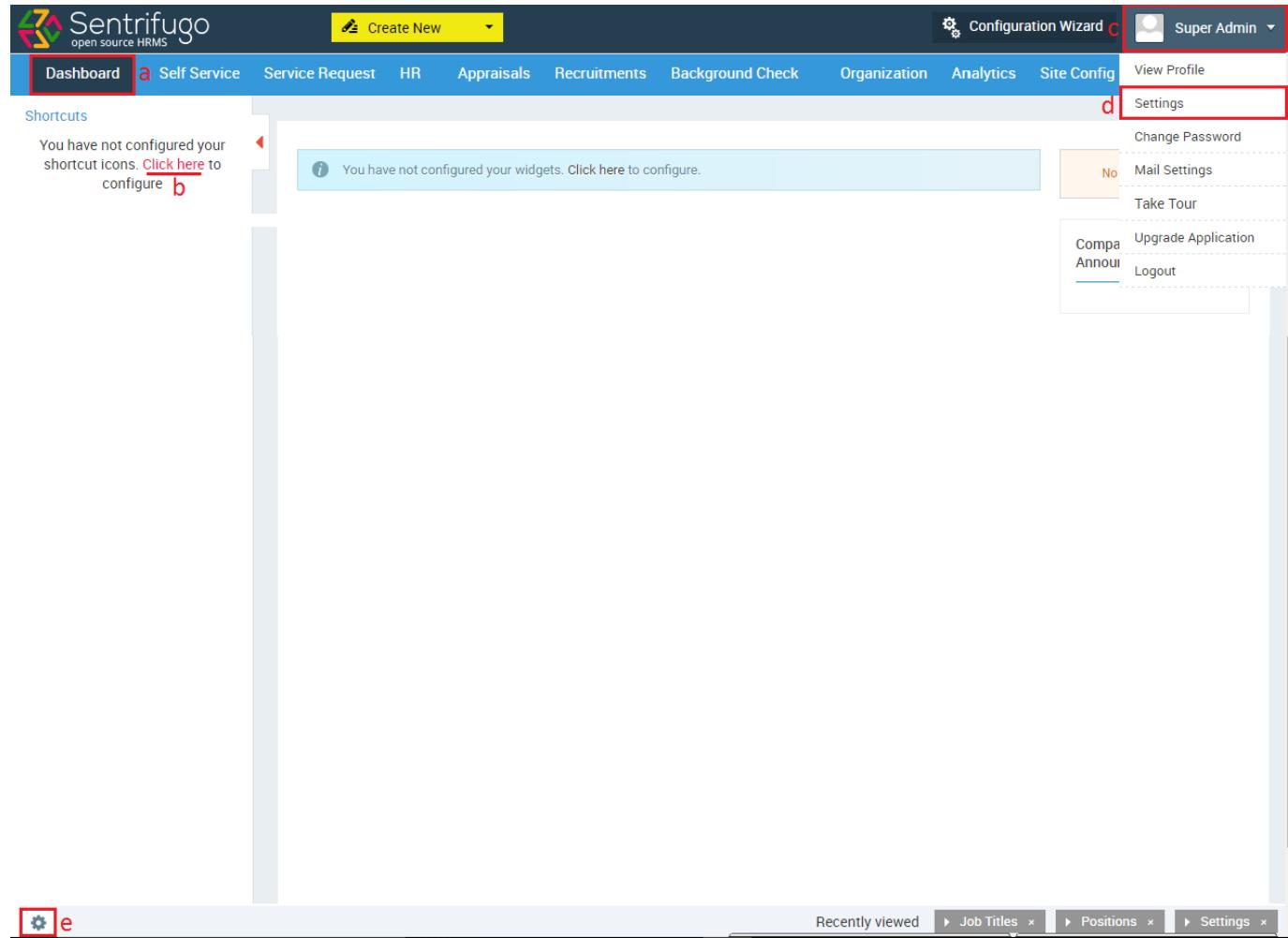


Figure 25

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

- a. Click the organization logo on the top left corner (This will take you to the dashboard from any other screen)
  - b. Click **Click here** link at the center of the dashboard
- Or**
- c. Click the **logged in user's name** in the top right corner
  - d. Click **Settings** in the dropdown
- Or**
- e. Click the **gear icon** in the bottom left corner

Please refer Figure 26.

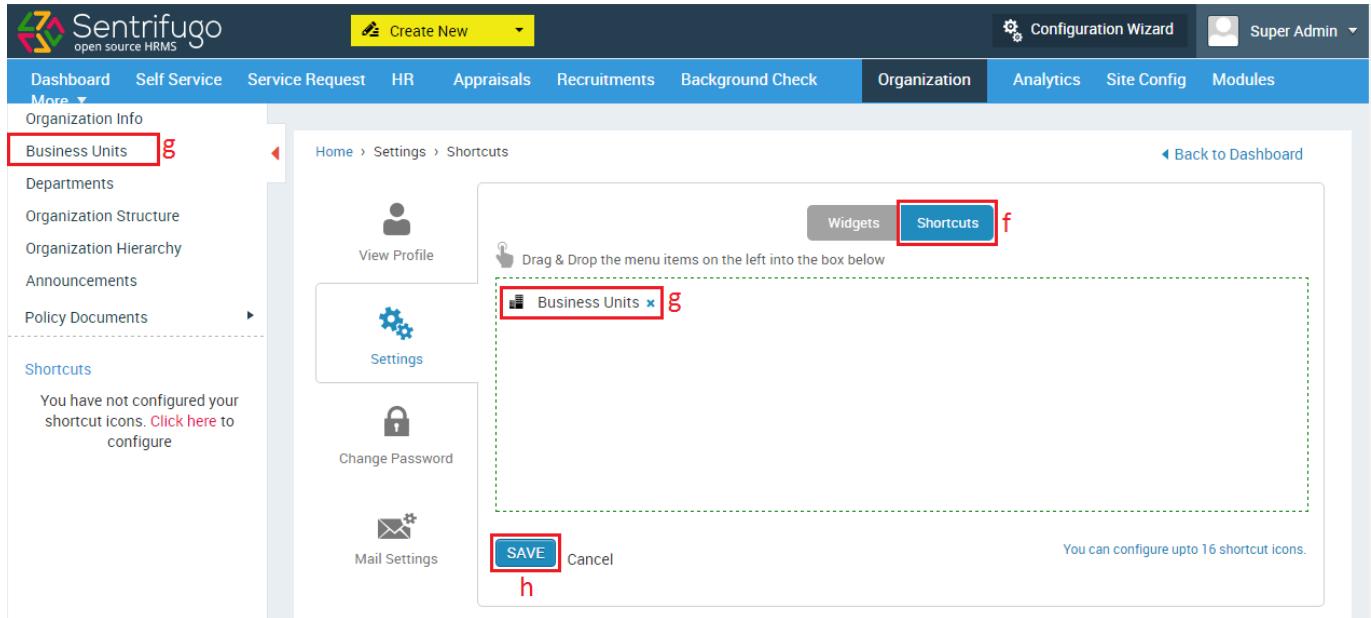


Figure 26

#### (Common for all)

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

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

Create New Configuration Wizard Super Admin

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

**Shortcuts**

**4**  
Openings/Positions  

Approved  
1
Rejected  
1

[View All](#)

**2**  
Screening Types  

[View All](#)

**2**  
Agencies  

[View All](#)

**1**  
Approved Requisitions  

[View All](#)

**1**  
Manager Appraisal  

[View](#)

**Roles & Privileges**  
Employees (2)  
HR (1)  
Management (1)  
External Users (1)  
Manager (1)

**Manage Holiday Group**  
New Group (1)

**Manage Holidays**  
20.09.2016 (Diwali)

**Categories**  
System Administration  
Accounts  
Software  
Hardware

**Appraisal Questions**  
What is Validation?  
What is Verification?  
What is Walkthrough?  
What is Agile Model?  
What is Inspection?

**5**

[View All](#)

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

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## 2.3 How do I add Announcements?

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

*Please refer Figure 27*

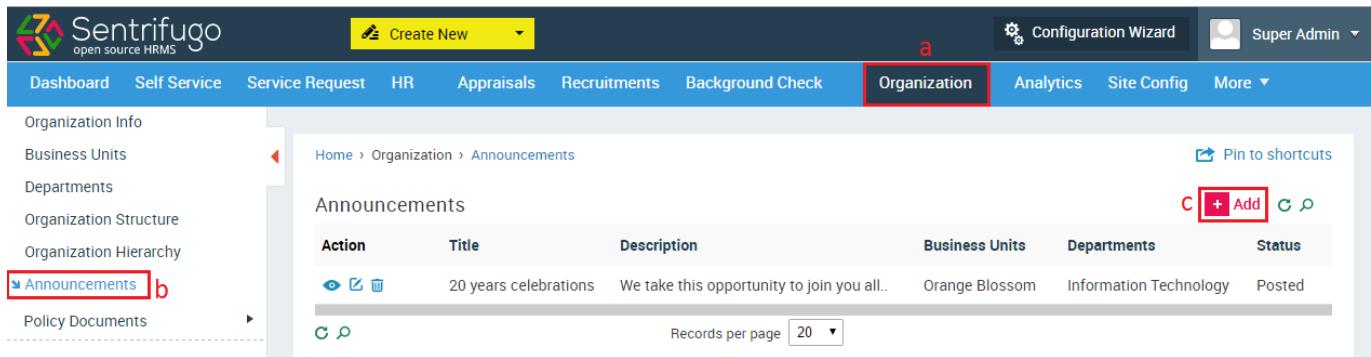
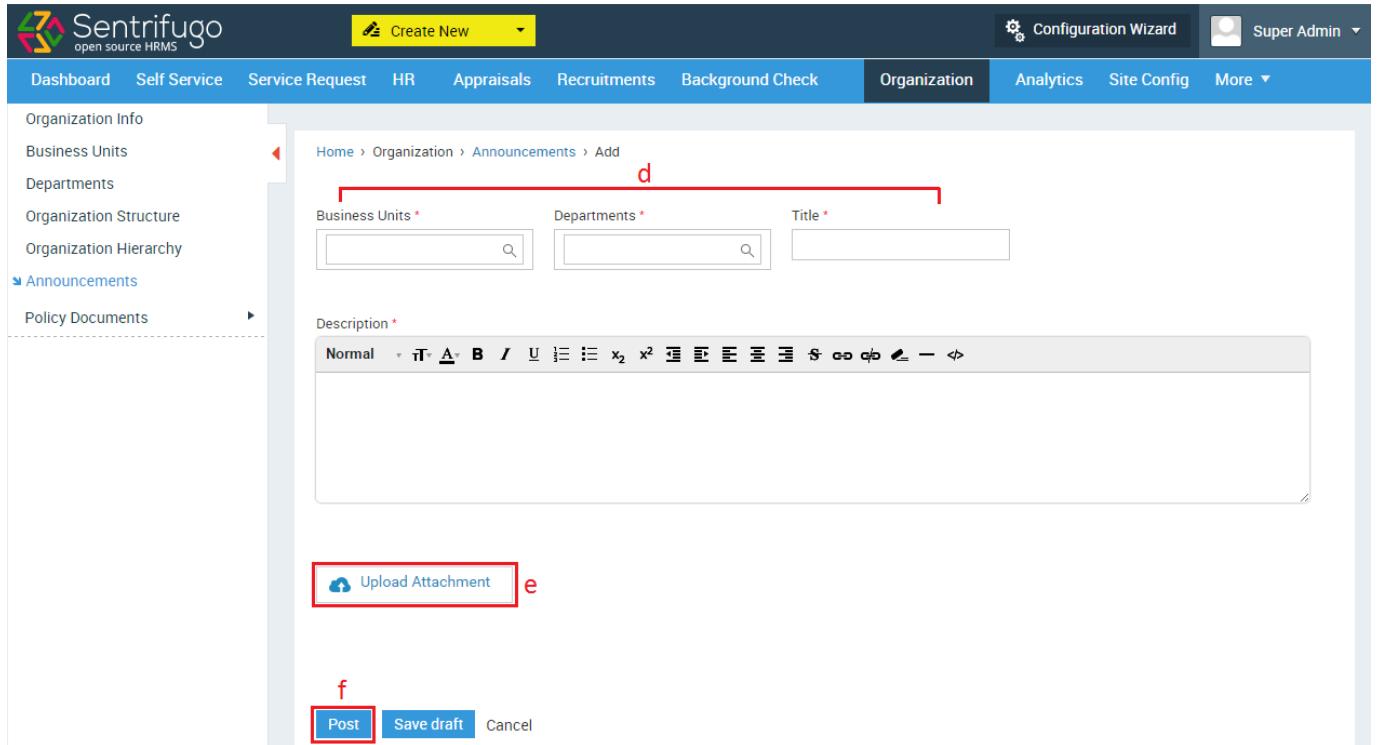


Figure 27

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

Please refer Figure 28.



The screenshot shows the Sentrifugo HRMS interface with the 'Announcements' module selected. The 'Add' form is displayed, featuring fields for Business Units, Departments, Title, Description (with a rich text editor), and an 'Upload Attachment' button. At the bottom are 'Post', 'Save draft', and 'Cancel' buttons, with 'Post' being highlighted by a red box.

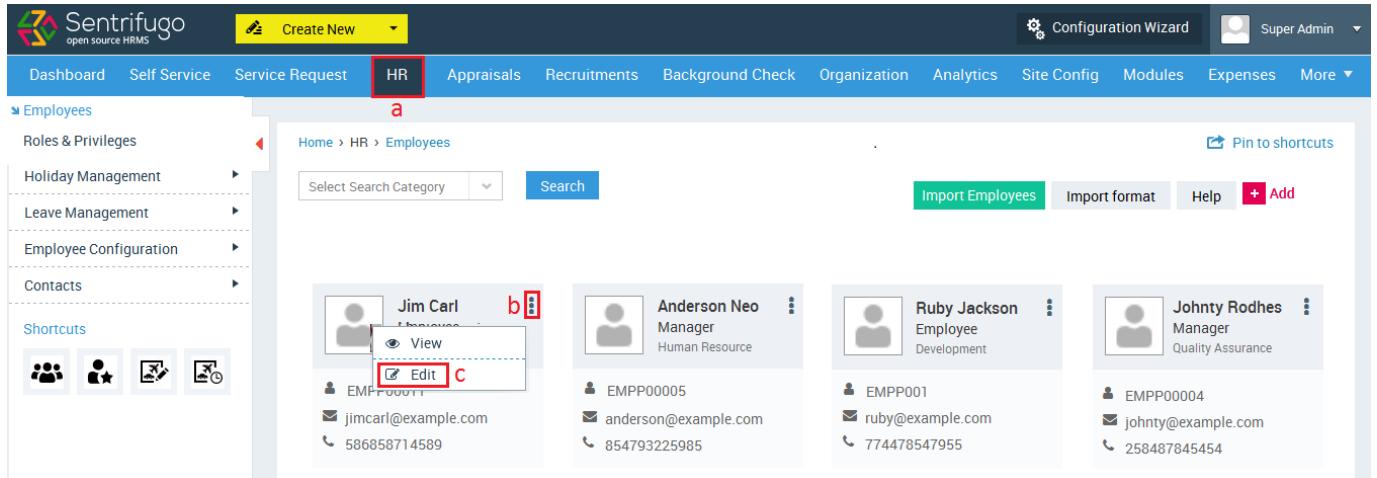
Figure 28

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

## 2.4 How do I add Birthday Announcements?

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

Please refer Figure 29.



The screenshot shows the Sentrifugo HRMS interface with the 'HR' module selected. The 'Employees' list view is displayed, showing profiles for Jim Carl, Anderson Neo, Ruby Jackson, and Johnny Rodhes. Jim Carl's profile is selected, and the 'Edit' button is highlighted by a red box.

Employee	Role	Actions
Jim Carl	Manager	
Anderson Neo	Manager	
Ruby Jackson	Employee	
Johnny Rodhes	Manager	

Figure 29

To add an employee's birthday:

- Click **HR** in the top menu
- Click **More Actions** icon
- Click **Edit** icon against any employee's name

Please refer Figure 30.

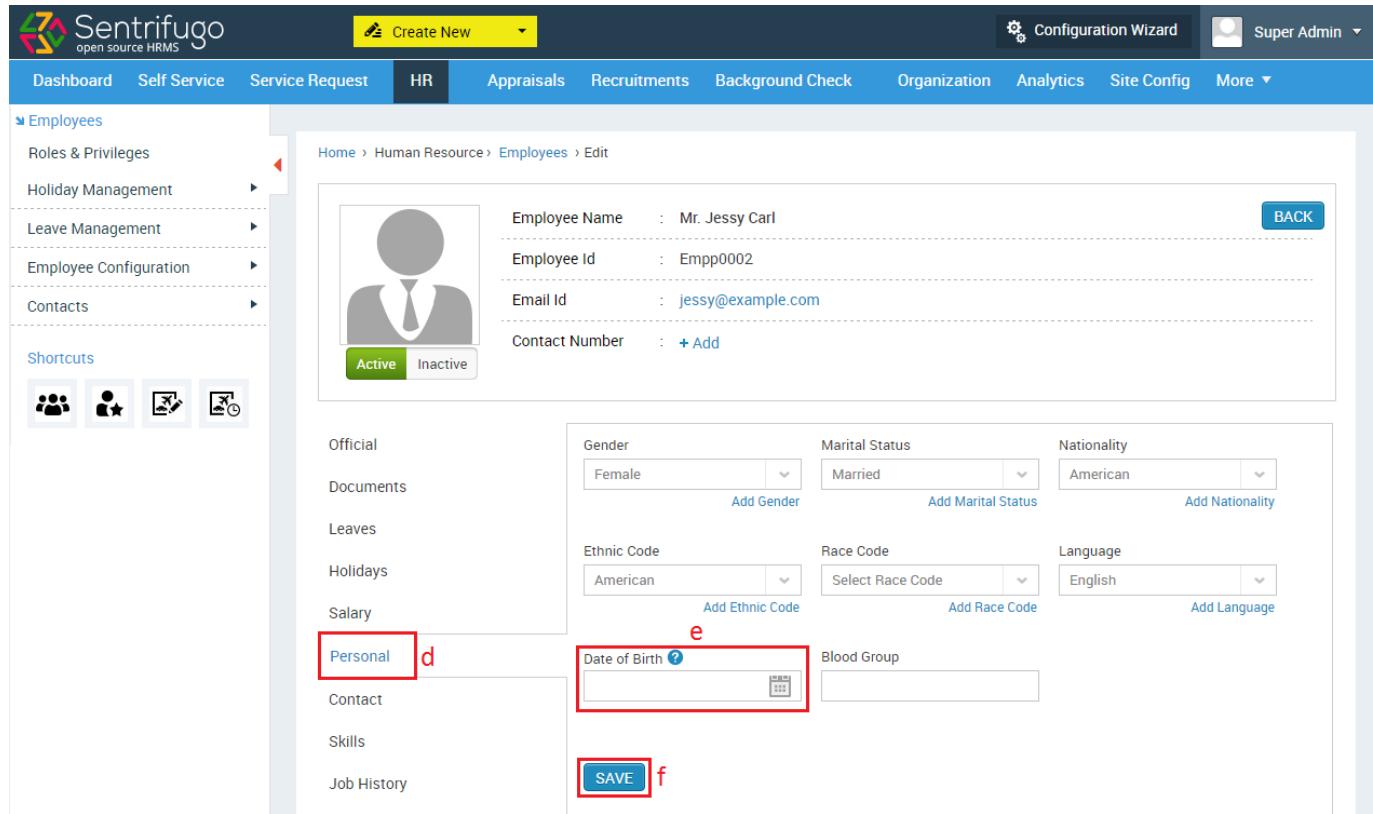
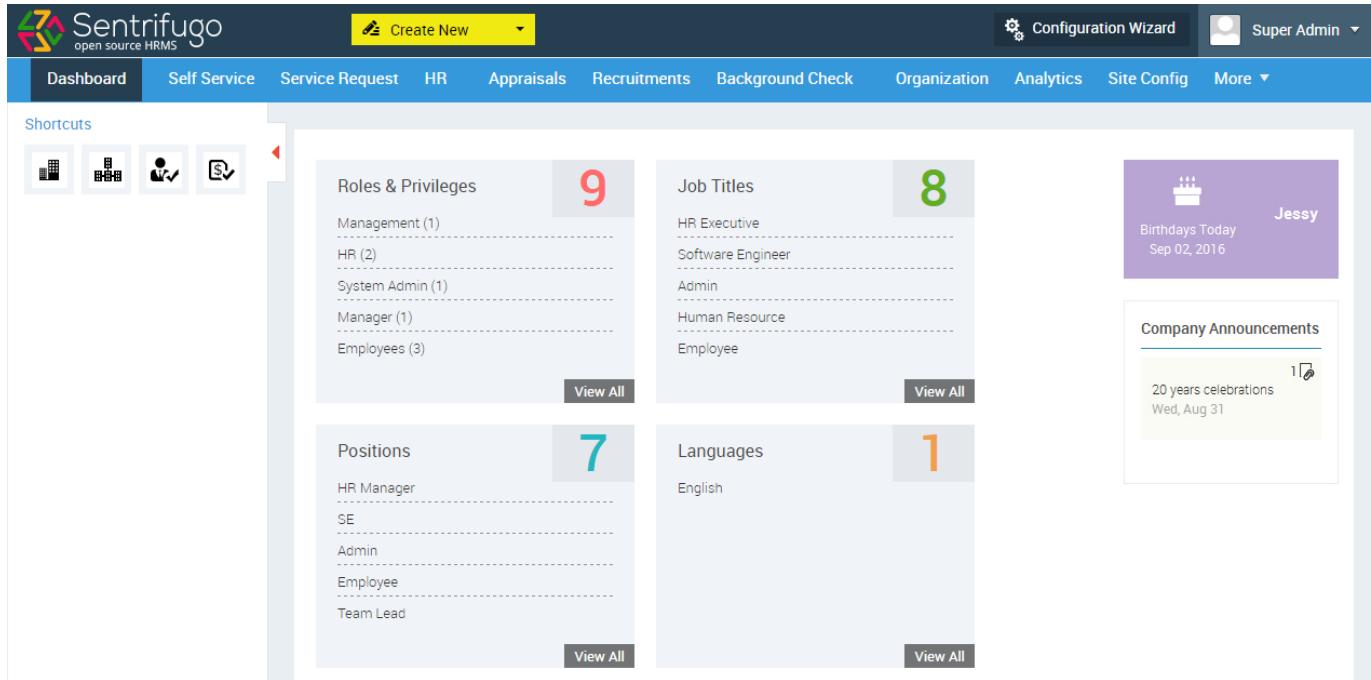


Figure 30

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

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

Please refer Figure 31.



The screenshot shows the Sentrifugo open source HRMS dashboard. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the far right of the top bar are 'Configuration Wizard' and 'Super Admin' dropdown menus. Below the navigation bar is a section titled 'Shortcuts' containing icons for Home, Employees, Departments, and Positions. The main content area displays several cards with employee statistics:

- Roles & Privileges** (Card #9): Management (1), HR (2), System Admin (1), Manager (1), Employees (3). [View All](#)
- Job Titles** (Card #8): HR Executive, Software Engineer, Admin, Human Resource, Employee. [View All](#)
- Positions** (Card #7): HR Manager, SE, Admin, Employee, Team Lead. [View All](#)
- Languages** (Card #1): English. [View All](#)

On the right side of the dashboard, there is a purple box for 'Birthdays Today' showing 'Jessy' with a birthday cake icon. Below it is a box for 'Company Announcements' with a message about '20 years celebrations' on 'Wed, Aug 31'.

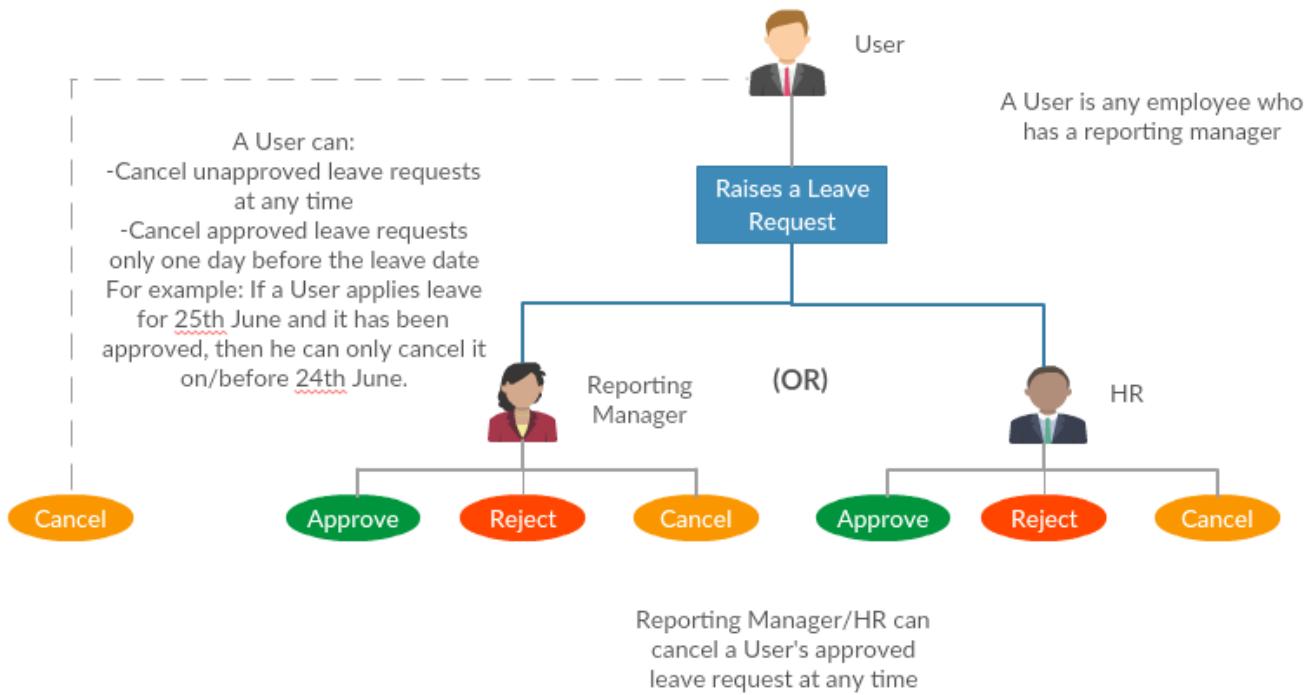
Figure 31



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

### 3. Leave Management

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



#### Process Description:

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



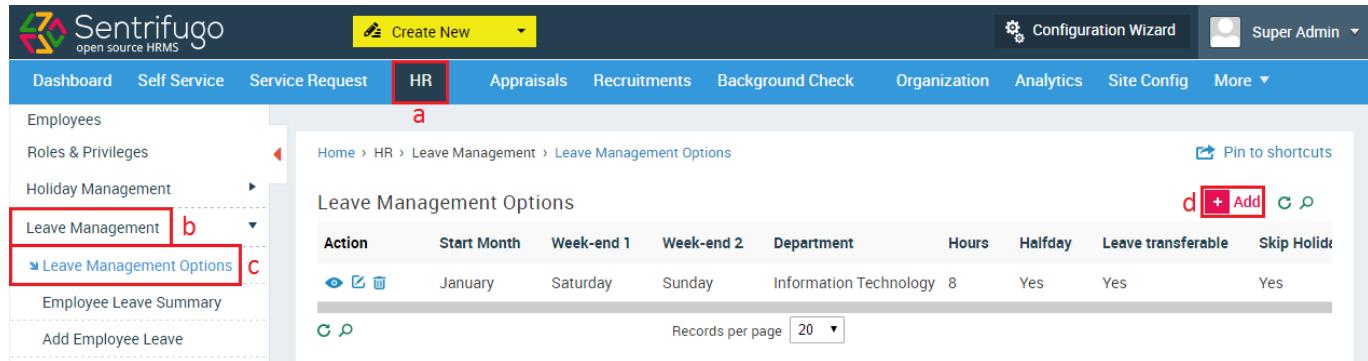
After an approved leave request has been cancelled, the leave(s) are credited back to the user's leave balance.

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

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

#### Leave Management Options

Please refer Figure 32.



Action	Start Month	Week-end 1	Week-end 2	Department	Hours	Halfday	Leave transferable	Skip Holidays
	January	Saturday	Sunday	Information Technology	8	Yes	Yes	Yes

Figure 32

To configure leave management options:

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

Please refer Figure 33.

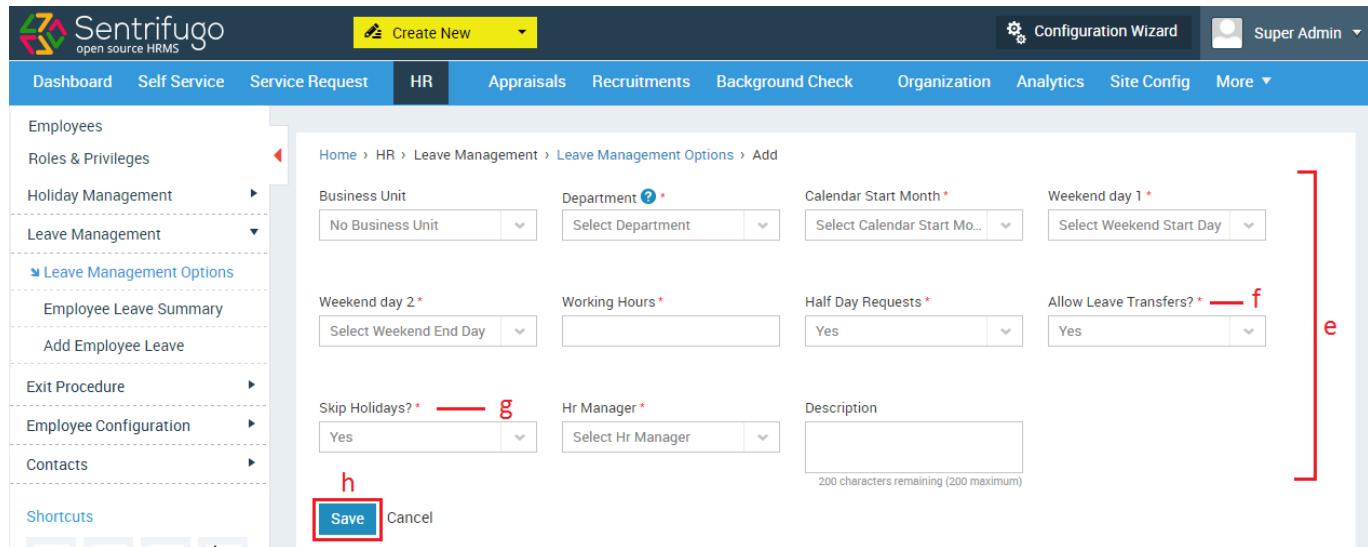


Figure 33

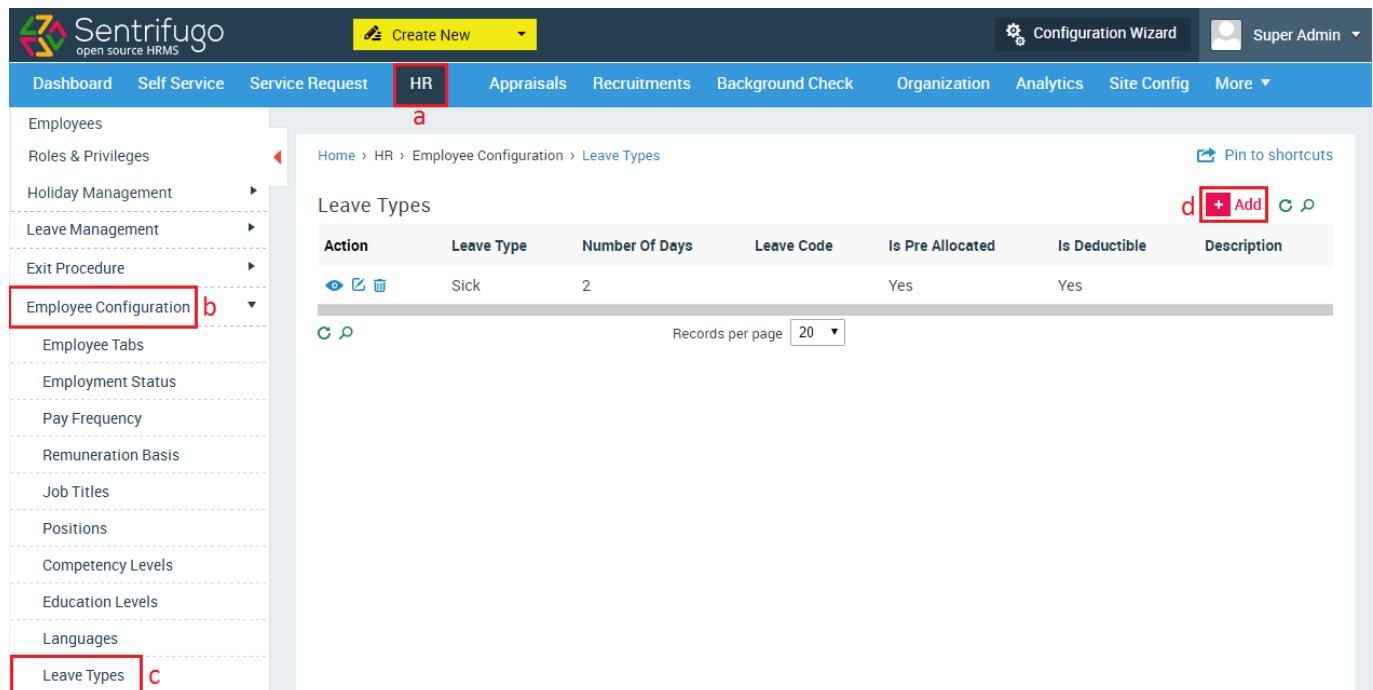
- e. Fill in the required details
- f. **Allow Leave Transfers:** If there are any unused leaves for an employee in the current year, then by using this option they will be carried forward to the next year
- g. **Skip Holidays:** If a user applies for a vacation which includes any pre-declared holiday,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



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

### 3.2 How do I create Leave Types?

Please refer Figure 34.



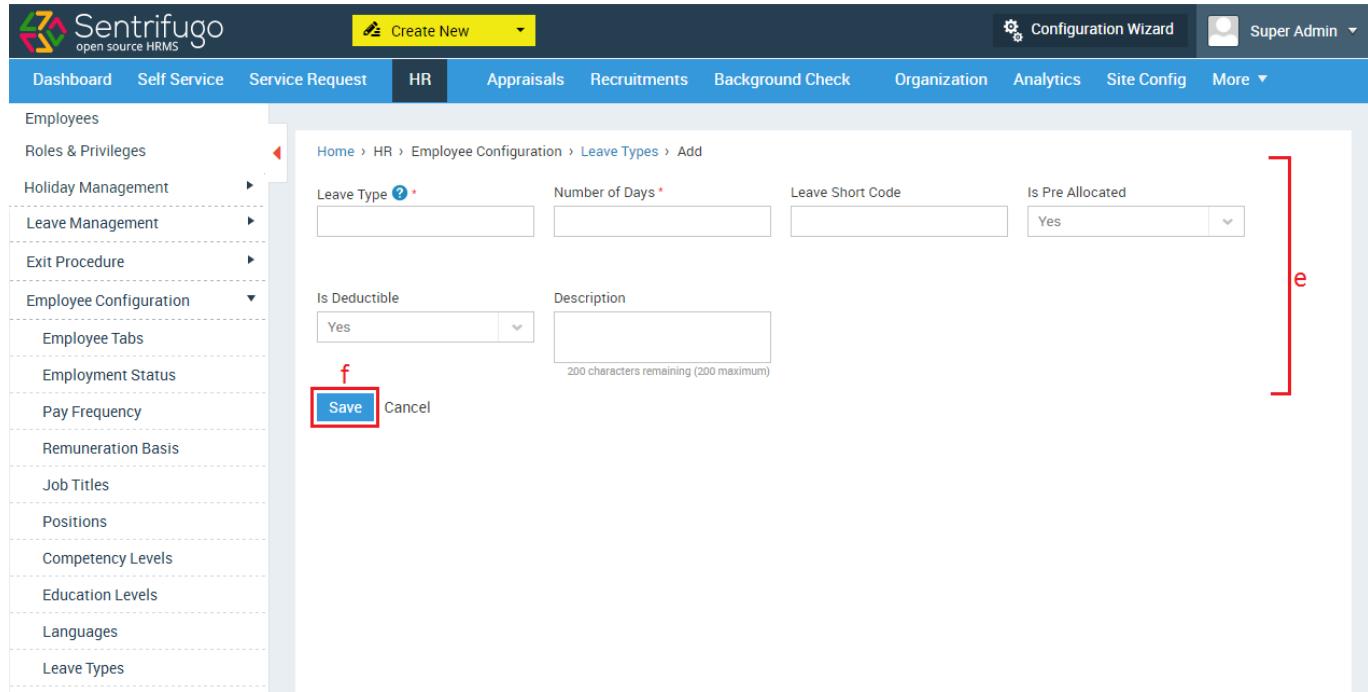
The screenshot shows the Sentrifugo open source HRMS application. The top navigation bar includes a logo, a 'Create New' dropdown, 'Configuration Wizard', 'Super Admin', and other menu items. The main menu has a 'HR' tab highlighted with a red box (labeled 'a'). On the left, a sidebar menu has 'Employee Configuration' highlighted with a red box (labeled 'b'). Under 'Employee Configuration', 'Leave Types' is also highlighted with a red box (labeled 'c'). The central content area shows a 'Leave Types' table with one row: Action (Edit, Delete), Leave Type (Sick), Number Of Days (2), Leave Code (empty), Is Pre Allocated (Yes), Is Deductible (Yes), and Description (empty). A red box labeled 'd' highlights the '+Add' button in the top right of the table header. The URL in the browser is 'Home > HR > Employee Configuration > Leave Types'.

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

Figure 34

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

Please refer Figure 35.



The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has tabs for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists categories like Employees, Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration (with 'Leave Types' selected), Employment Status, Pay Frequency, Remuneration Basis, Job Titles, Positions, Competency Levels, Education Levels, Languages, and Leave Types. The central content area shows a 'Leave Types' add form with fields for 'Leave Type' (dropdown), 'Number of Days' (text input), 'Leave Short Code' (text input), 'Is Pre Allocated' (dropdown set to 'Yes'), 'Is Deductible' (dropdown set to 'Yes'), and a 'Description' text area (with placeholder '200 characters remaining (200 maximum)'). A red bracket labeled 'e' points to the 'Is Pre Allocated' field and the 'Description' area. A red box labeled 'f' surrounds the blue 'Save' button at the bottom left of the form.

Figure 35

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



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

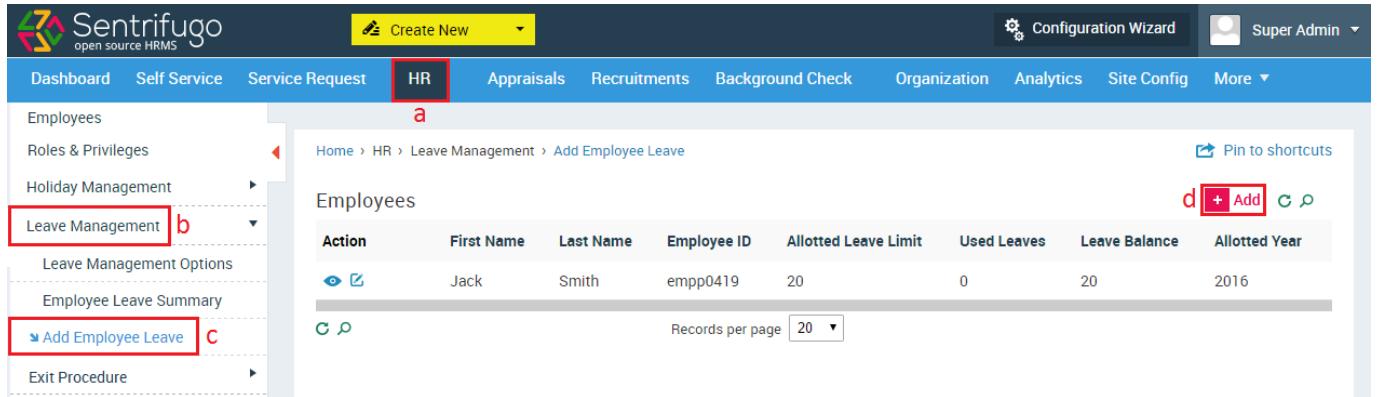
### 3.3 How do I allocate Leave to Employees?

There are two ways to allocate leaves to employees:

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

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

Please refer Figure 36

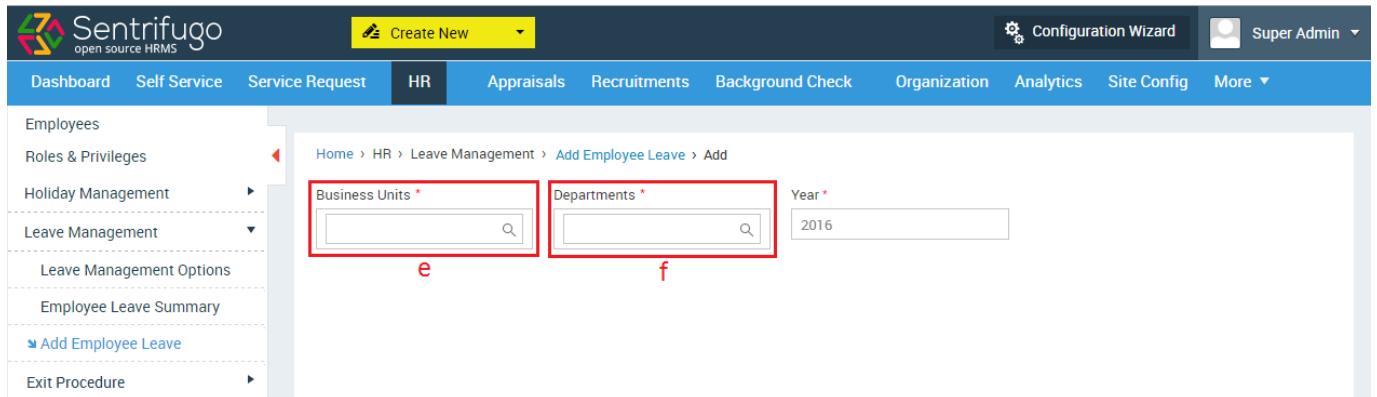


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has 'Dashboard', 'Self Service', 'Service Request', 'HR' (which is highlighted in red), 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. On the left, a sidebar menu lists 'Employees', 'Roles & Privileges', 'Holiday Management', 'Leave Management' (which is highlighted in red), 'Leave Management Options', 'Employee Leave Summary', 'Add Employee Leave' (which is highlighted in red), and 'Exit Procedure'. The central content area shows a breadcrumb path: Home > HR > Leave Management > Add Employee Leave. It displays a table titled 'Employees' with columns: Action, First Name, Last Name, Employee ID, Allotted Leave Limit, Used Leaves, Leave Balance, and Allotted Year. A single row is shown for 'Jack Smith' with employee ID 'empp0419', allotment '20', used leaves '0', balance '20', and year '2016'. On the right, there are buttons for '+ Add' and search ('C').

Figure 36

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

Please refer Figure 37



This screenshot continues from Figure 36. The 'Add Employee Leave' page now includes three filter fields: 'Business Units \*' (highlighted in red), 'Departments \*' (highlighted in red), and 'Year \*' (set to '2016'). The rest of the interface is identical to Figure 36.

Figure 37

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

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

Please refer Figure 38

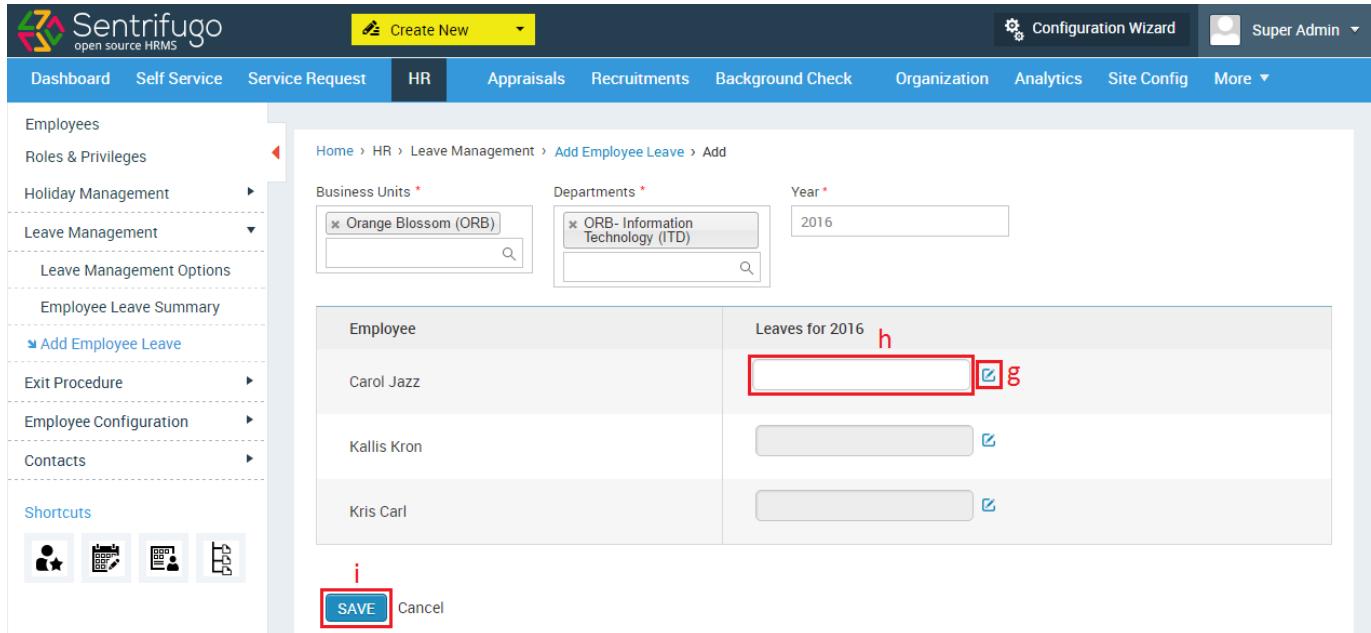


Figure 38

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

### One employee at a time

Please refer Figure 39

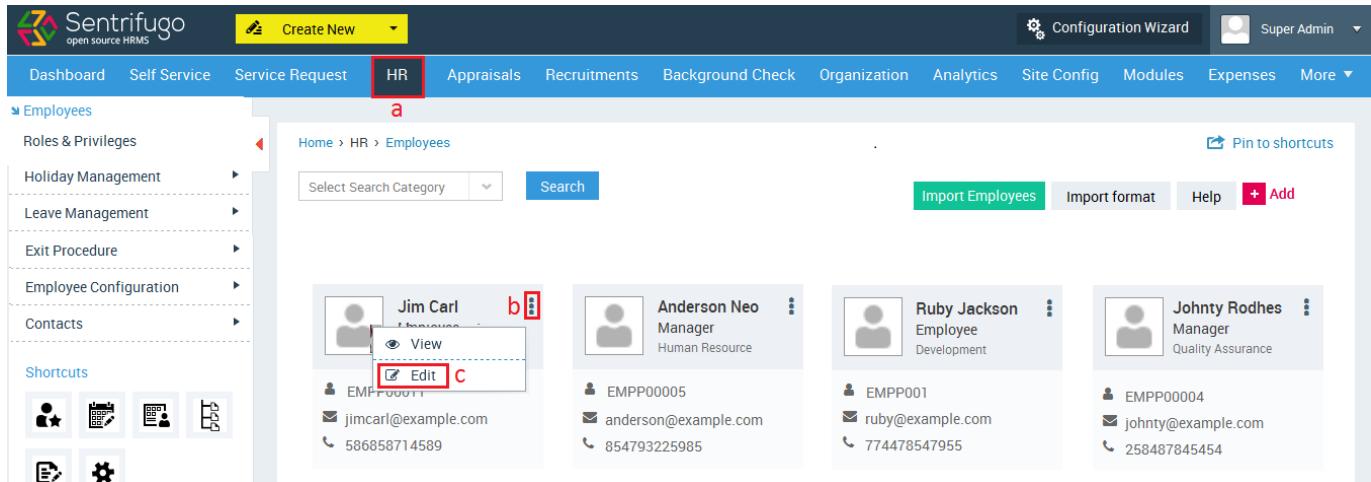
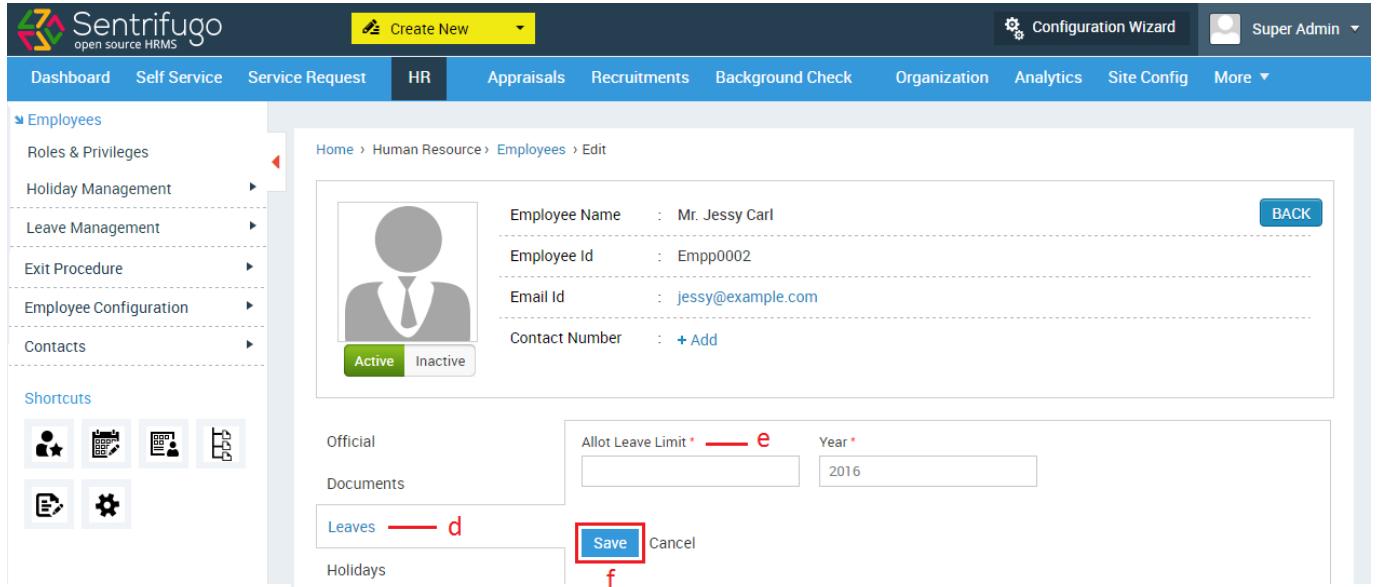


Figure 39

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

- c. Click **Edit** icon

Please refer Figure 40



Employee Name : Mr. Jessy Carl  
 Employee Id : Empp0002  
 Email Id : jessy@example.com  
 Contact Number : + Add

Official  
 Allot Leave Limit \* e  
 Year \* 2016

Leaves d

Save f Cancel

Figure 40

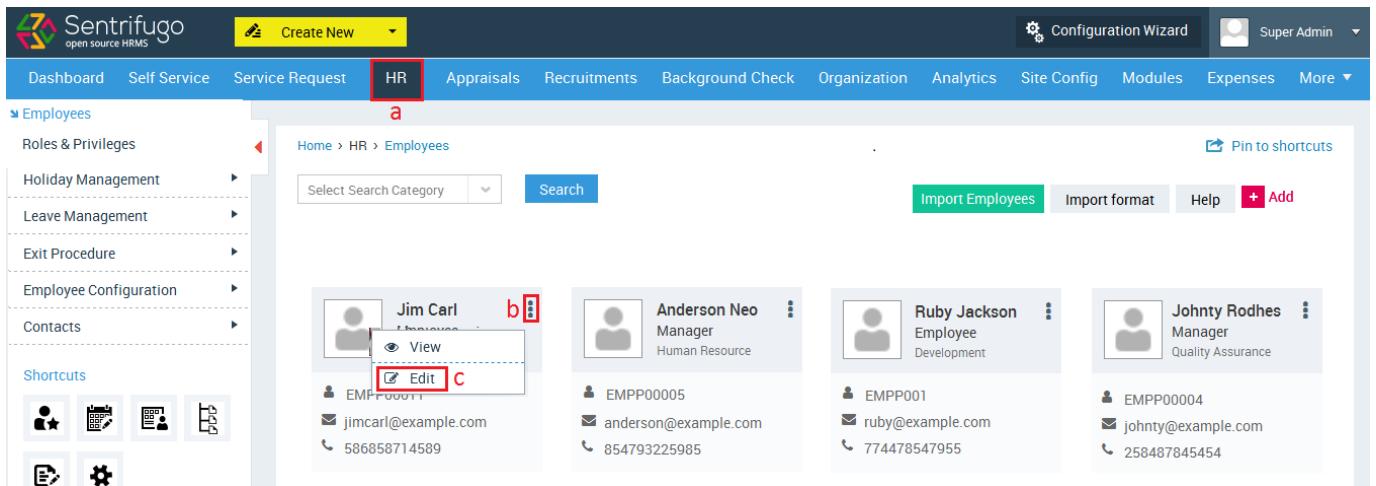
- d. Click **Leaves** on the left menu panel (left side of the form)  
 e. Enter the number of days for this employee  
 f. Click **SAVE** button



You can allocate leaves to employees only for the current year

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

Please refer Figure 41

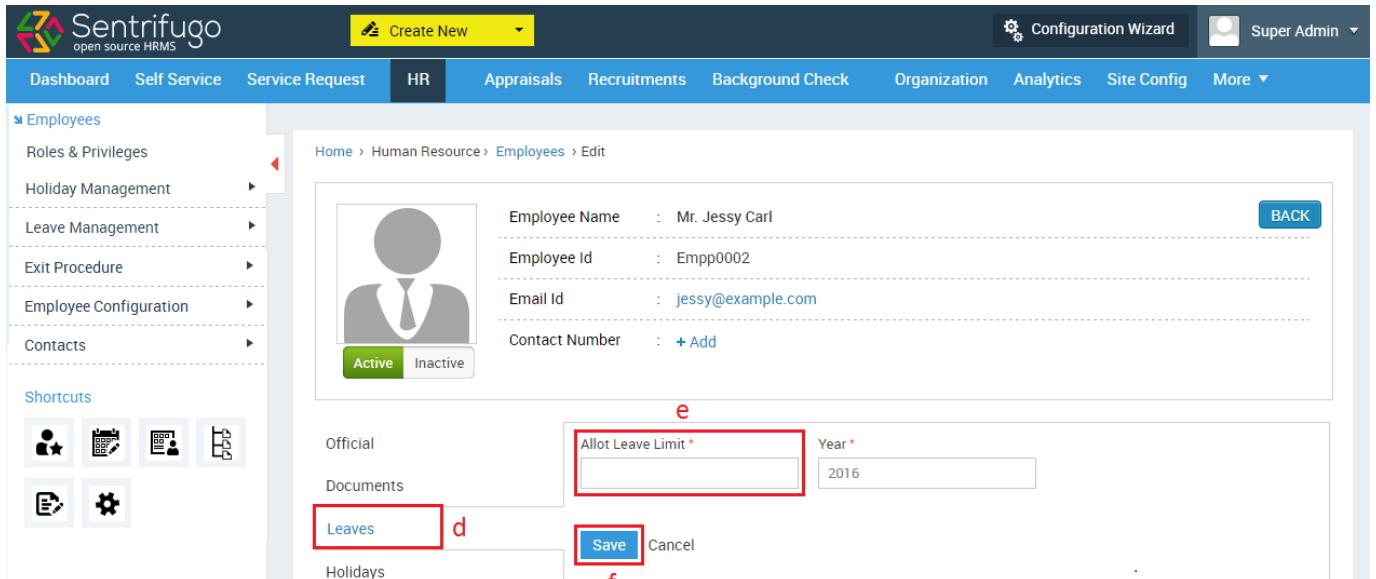


The screenshot shows the HR module's Employees list. The top navigation bar has 'HR' highlighted with a red box. Below it, there's a search bar and several buttons: 'Import Employees', 'Import format', 'Help', and '+ Add'. The main area displays four employee cards. The first card for 'Jim Carl' has a callout 'a' pointing to its 'Edit' icon. Callout 'b' points to the Jim Carl card. Callout 'c' points to the 'Edit' icon within the Jim Carl card.

Figure 41

- Click **HR** in the top menu
- Click **More Actions** icon
- Click **Edit** icon

Please refer Figure 42



The screenshot shows the 'Edit' screen for an employee named 'Mr. Jessy Carl'. The left sidebar has 'Leaves' selected. The main form shows employee details: Name (Mr. Jessy Carl), ID (Empp0002), Email (jessy@example.com), and Contact Number (+ Add). Below this, there are tabs for 'Official', 'Documents', and 'Leaves'. The 'Leaves' tab is highlighted with a red box and labeled 'd'. Under 'Leaves', there's a field 'Allot Leave Limit \*' with a red box around it, labeled 'e'. To the right of this field is a 'Year' dropdown set to '2016'. At the bottom right are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red box and labeled 'f'.

Figure 42

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



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

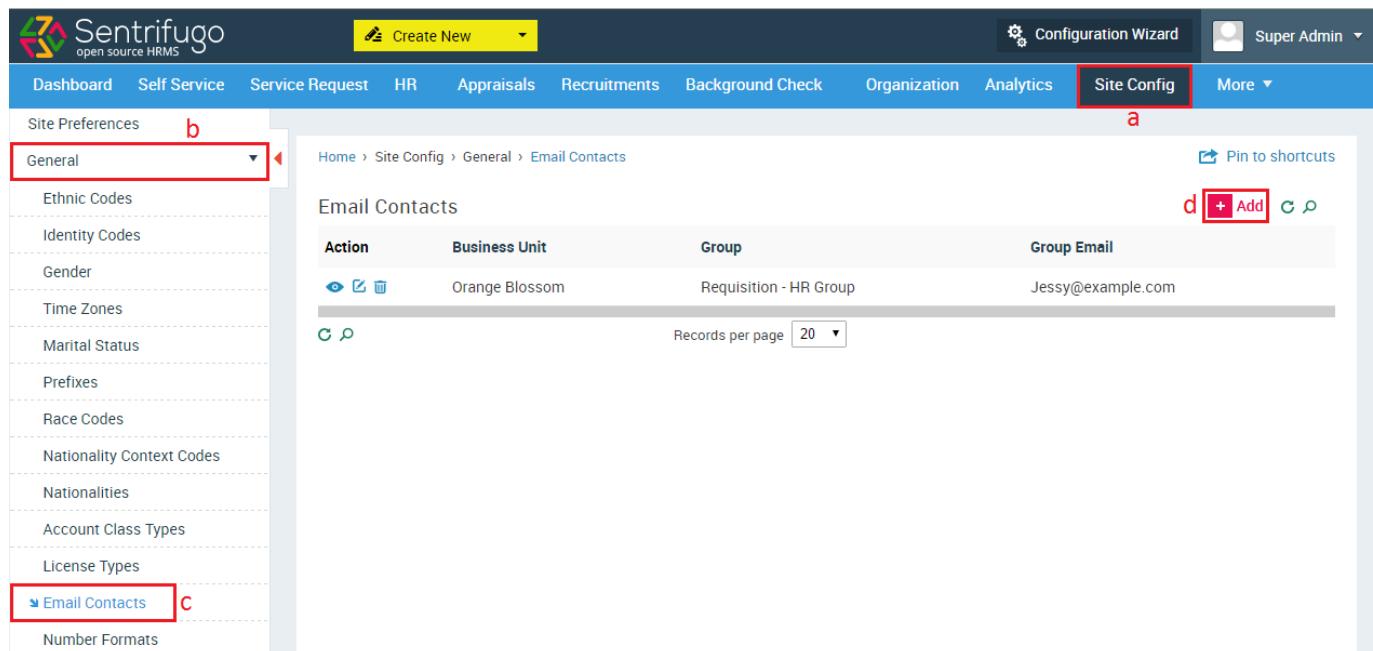
### 3.5 How do I create HR Email Group for Leave Management?

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



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

Please refer Figure 43

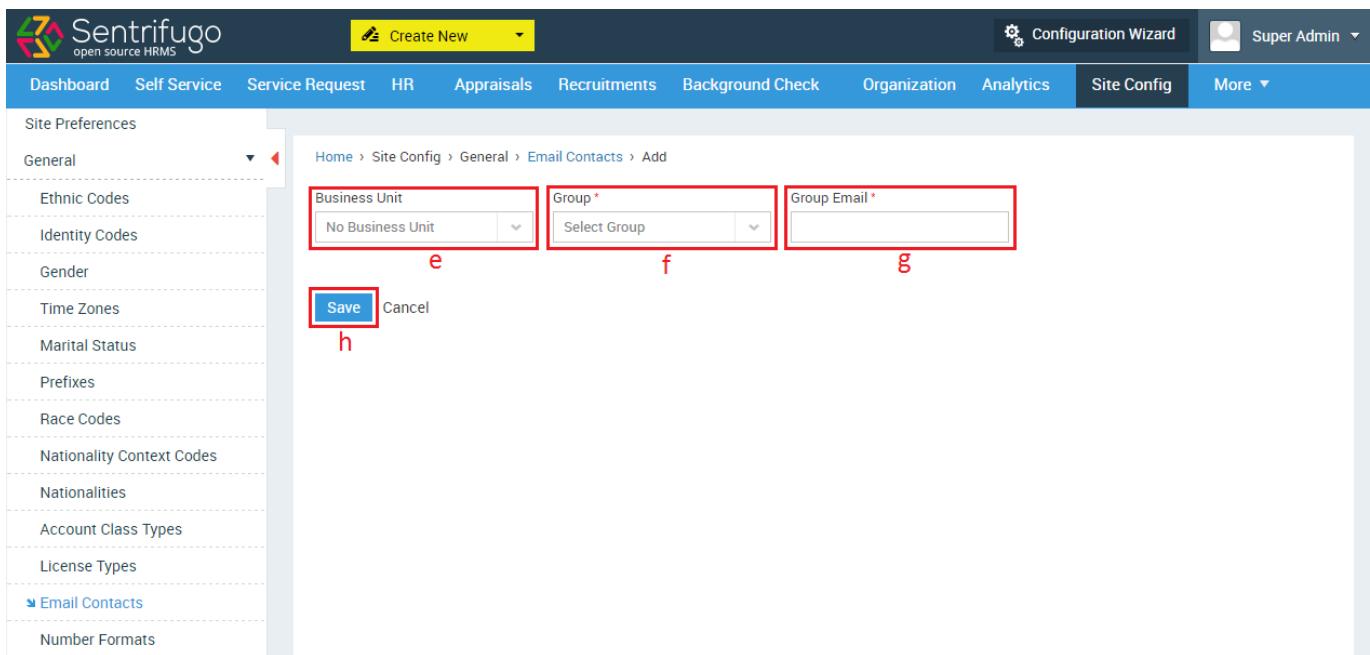


The screenshot shows the Sentrifugo application interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (which is highlighted with a red box), and More. On the far right, it shows a Super Admin user and a configuration wizard icon. Below the navigation bar is a left sidebar with a tree view of site preferences: General (selected and highlighted with a red box), Ethnic Codes, Identity Codes, Gender, Time Zones, Marital Status, Prefixes, Race Codes, Nationality Context Codes, Nationalities, Account Class Types, License Types, and Email Contacts (highlighted with a red box). The main content area shows the 'Email Contacts' section under 'Site Config > General > Email Contacts'. It has a table with columns: Action, Business Unit, Group, and Group Email. One row is visible: Action (eye, edit, delete icons), Business Unit (Orange Blossom), Group (Requisition - HR Group), and Group Email (Jessy@example.com). There are also buttons for '+Add' and 'Pin to shortcuts'. At the bottom of the page, there is a footer with links for Home, Support, Documentation, and GitHub.

Figure 43

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

Please refer Figure 44



The screenshot shows the 'Site Preferences' section under 'General'. The 'Email Contacts' option is selected. On the right, there's a form for adding a new email contact. It has three fields: 'Business Unit' (dropdown, labeled e), 'Group\*' (dropdown, labeled f), and 'Group Email\*' (input field, labeled g). Below these fields are 'Save' and 'Cancel' buttons, with 'Save' being highlighted (labeled h).

Figure 44

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



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

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

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



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

#### To raise a leave request:

Please refer Figure 45

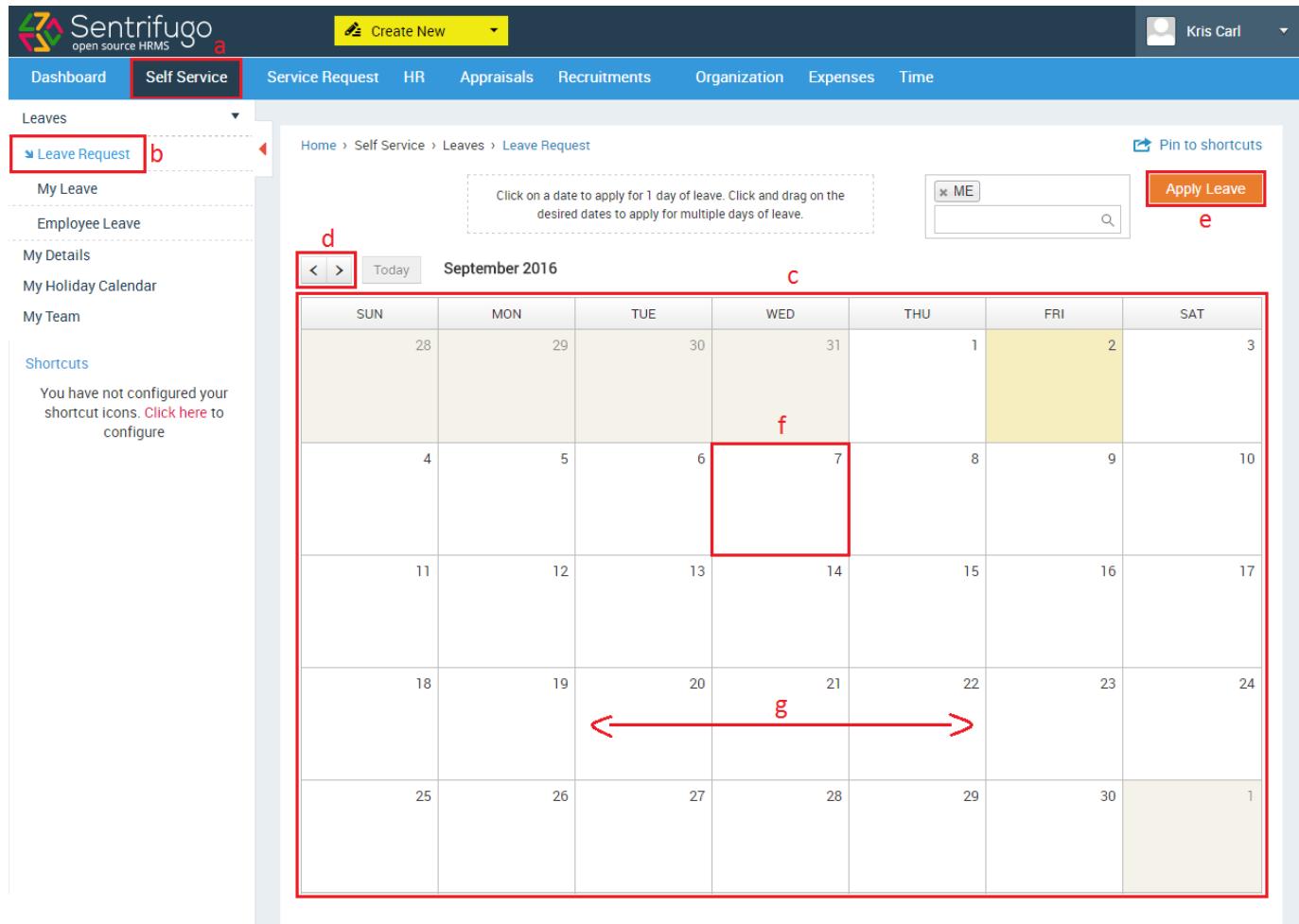


Figure 45

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

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

Please refer Figure 46

**Create: Leave request**

Available Leaves *	Leave Type *	Reason *
20	Select Leave Type	30 characters remaining (30 maximum)
From ? *	To ? *	Leave For *
2016-Sep-14	2016-Sep-14	Full Day
Days	Reporting Manager *	
1	Jim Jim	
<input style="background-color: #0070C0; color: white; border: 1px solid #0070C0; padding: 5px; margin-right: 10px;" type="button" value="Apply"/> <input type="button" value="Cancel"/>		

Figure 46

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

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

Please refer Figure 47

Sentrifugo open source HRMS

[Create New](#)

Hans Cronje

[Dashboard](#) [Self Service](#) [Service Request](#) [HR](#) [Appraisals](#) [Recruitments](#) [Organization](#) [Expenses](#) [Time](#)

Leaves

- Leave Request
- My Leave 1
- Employee Leave
- My Details
- My Holiday Calendar
- My Team
- Shortcuts

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

My Leave

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

Records per page: 20

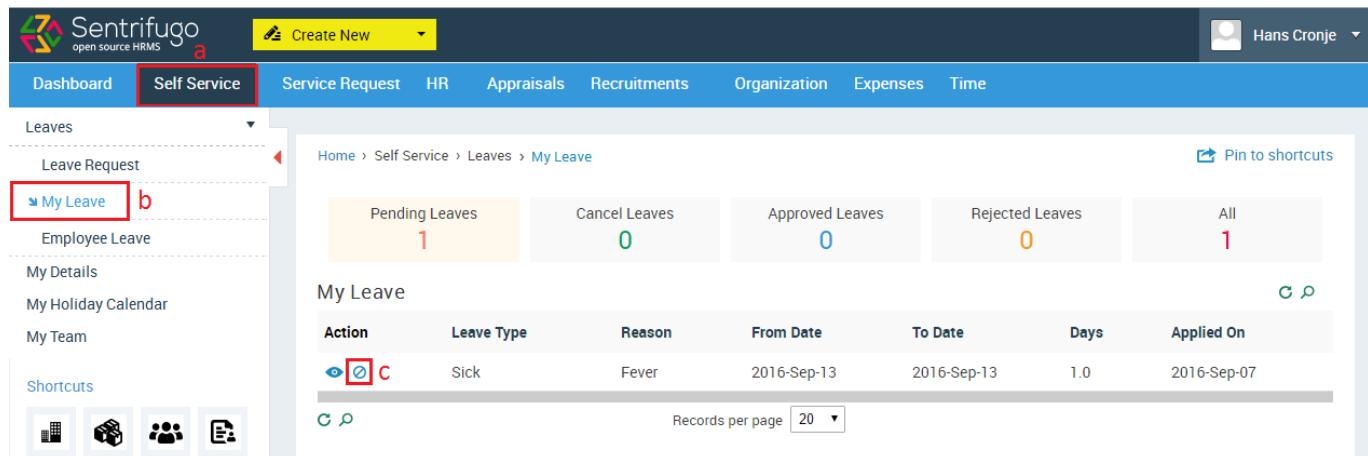
Figure 47

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

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

#### Employee

*Please refer Figure 48*



The screenshot shows the Sentrifugo self-service interface. The top navigation bar includes 'Create New', 'Hans Cronje', 'Dashboard', 'Self Service' (which is highlighted with a red box 'a'), 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. The left sidebar has sections for 'Leaves' (highlighted), 'Leave Request' (highlighted), 'Employee Leave' (highlighted with a red box 'b'), 'My Details', 'My Holiday Calendar', 'My Team', and 'Shortcuts' (with icons for Home, Profile, Groups, and Help). The main content area shows a summary of leave status: Pending Leaves (1), Cancel Leaves (0), Approved Leaves (0), Rejected Leaves (0), and a total count of 1 for All. Below this is a table titled 'My Leave' with columns: Action, Leave Type, Reason, From Date, To Date, Days, and Applied On. One row is listed: Action (with a red box 'c' over the icon), Leave Type (Sick), Reason (Fever), From Date (2016-Sep-13), To Date (2016-Sep-13), Days (1.0), and Applied On (2016-Sep-07). At the bottom are search and filter options ('C', 'Records per page: 20').

Figure 48

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

A confirmation message will be displayed

*Please refer Figure 49*

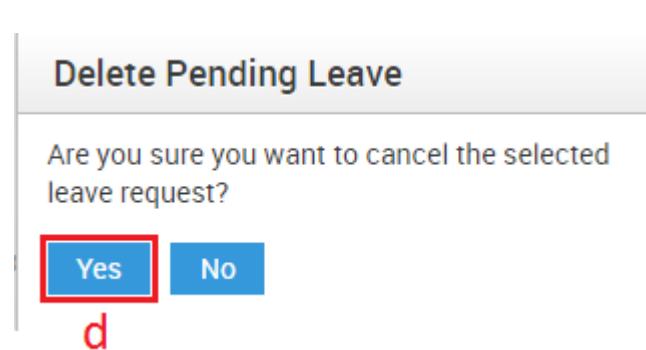


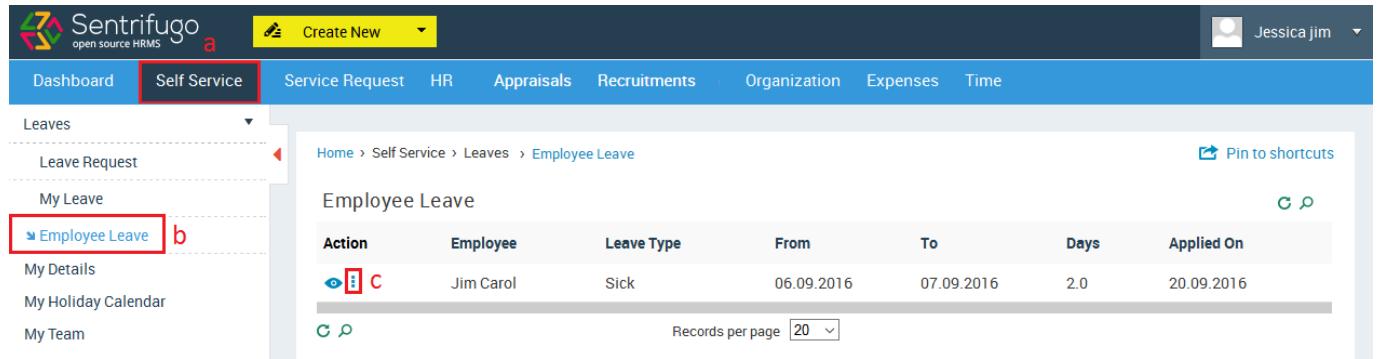
Figure 49

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

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

## **Manager**

Please refer Figure 50



The screenshot shows the Sentrifugo web application interface. At the top, there is a navigation bar with the Sentrifugo logo, a 'Create New' button, and a user profile for 'Jessica Jim'. Below the navigation bar is a blue header bar with links for Dashboard, Self Service (which is highlighted with a red box 'a'), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time.

The main content area has a sidebar on the left with categories like Leaves, Leave Request, My Leave, Employee Leave (which is highlighted with a red box 'b'), My Details, My Holiday Calendar, and My Team. The 'Employee Leave' section contains a table with the following data:

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

At the bottom of the table, there are buttons for 'G' and 'P', and a 'Records per page' dropdown set to 20. There is also a 'Pin to shortcuts' button in the top right corner of the main content area.

Figure 50

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

A small pop up window will open.

Please refer Figure 51

**Leaverequest**

Status	d <input type="button" value="Cancel"/>	Comments	
50 characters remaining (50 maximum)			
<input style="outline: none; border: 2px solid red; padding: 2px; margin-right: 10px;" type="button" value="SAVE"/> e			
Employee	Jim Carol	Leave Type	Sick
From	06.09.2016	To	07.09.2016
Leave For	Full Day	Days	2.0
Approved On	20.09.2016	Comments	

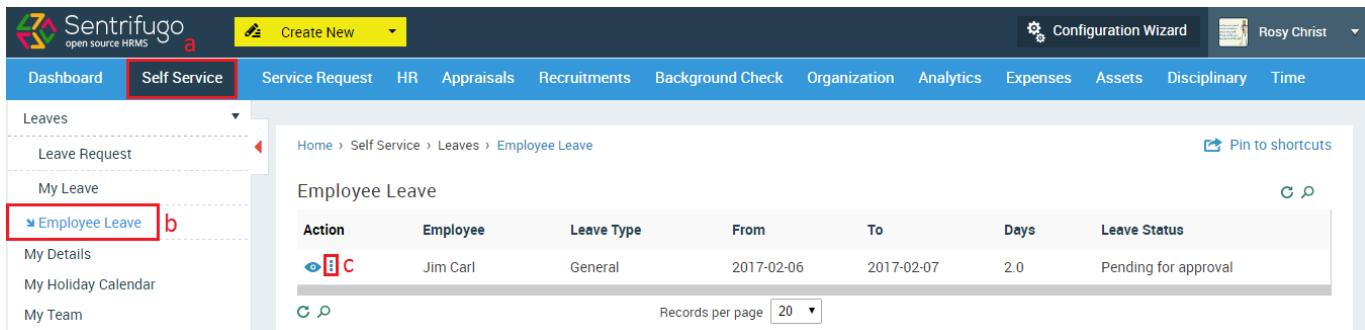
Figure 51

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

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

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

*Please refer Figure 52*



a. Configuration Wizard

b. Self Service

c. Employee Leave

Detailed description: This screenshot shows the Sentrifugo web application. At the top, there is a navigation bar with links for Dashboard, Self Service (which is highlighted with a red box), Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Expenses, Assets, Disciplinary, and Time. Below the navigation bar, there is a sidebar titled 'Leaves' with options for Leave Request, My Leave, and Employee Leave (which is also highlighted with a red box). The main content area shows a breadcrumb path: Home > Self Service > Leaves > Employee Leave. It displays a table of leave requests with columns for Action, Employee, Leave Type, From, To, Days, and Leave Status. One row is shown in the table:

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

Figure 52

- a. Click **Self Service** in the top menu
- b. Click **Employee Leave** in the submenu
- c. Click **More Actions** button in the Action column

A small pop up window will open.

*Please refer Figure 53*

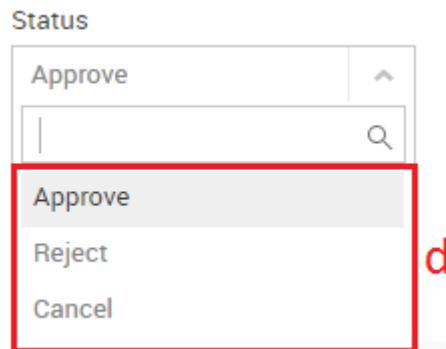


Figure 53

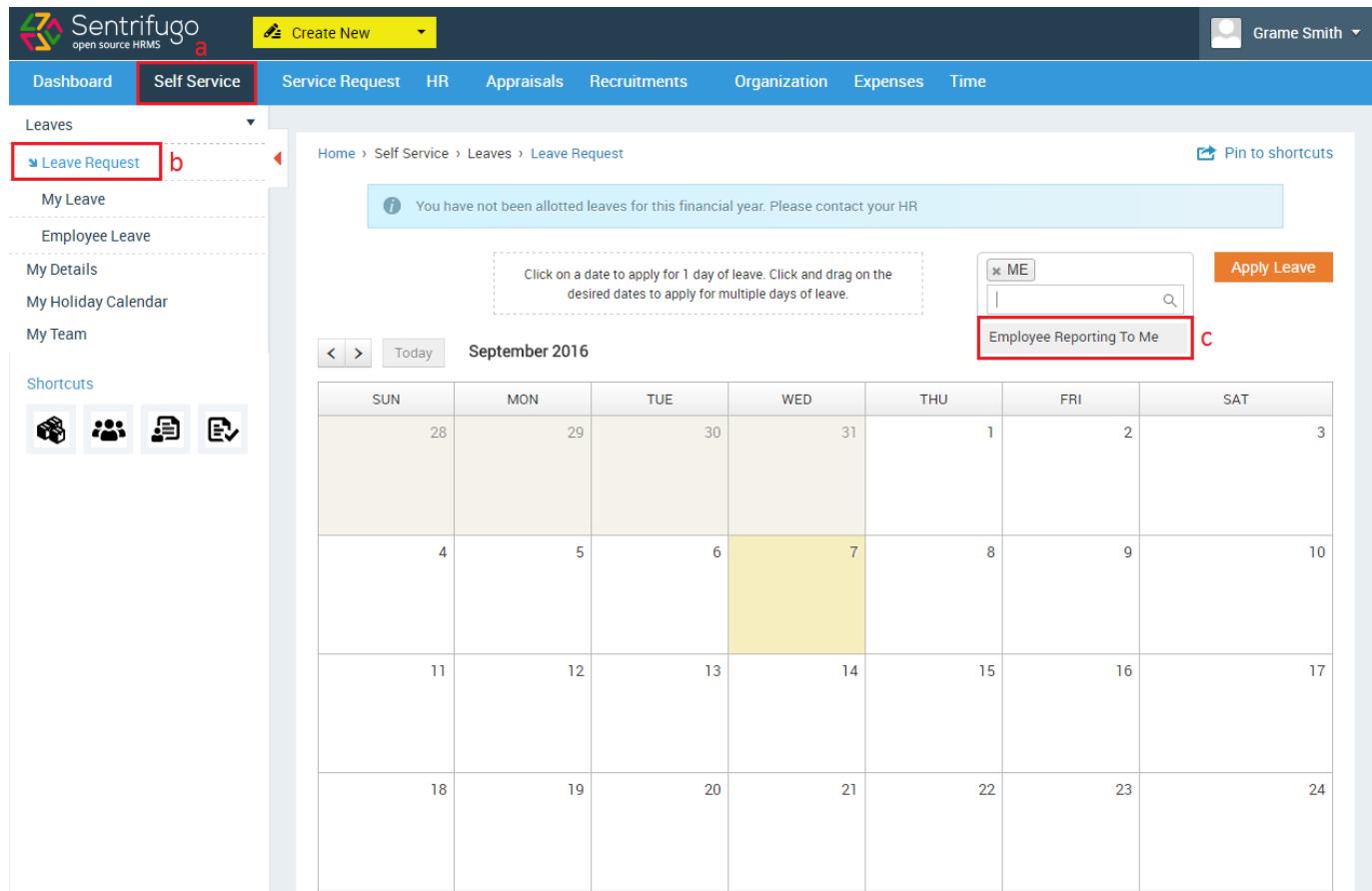
- d. Select the status

Click SAVE button to complete the selected action.

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

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

Please refer Figure 54



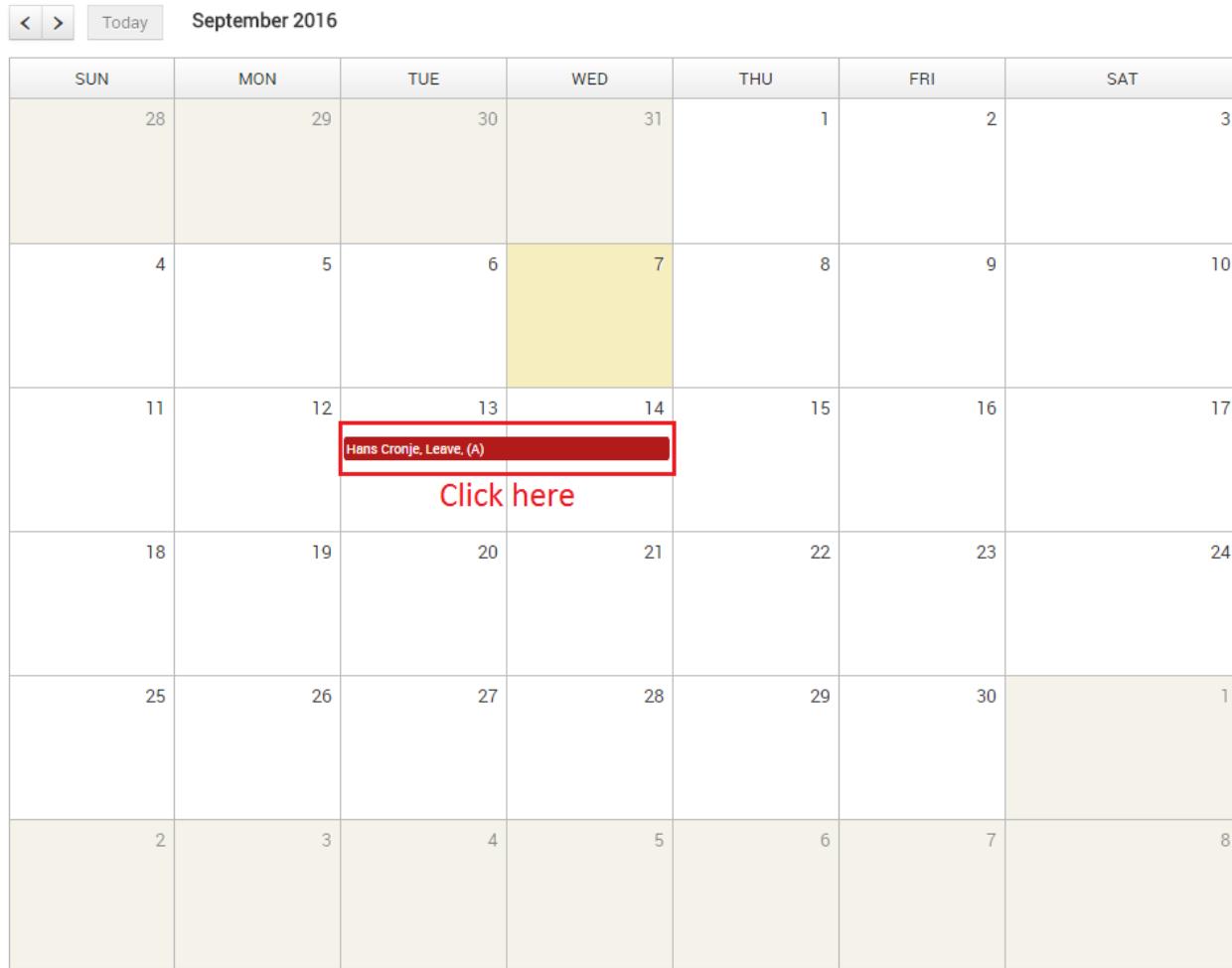
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes the logo, a 'Create New' button, and a user profile for 'Grame Smith'. The main menu has tabs for Dashboard, Self Service (which is selected and highlighted with a red box), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. Under the 'Leaves' section of the left sidebar, 'Leave Request' is selected and highlighted with a red box (labeled 'a'). The breadcrumb path shows Home > Self Service > Leaves > Leave Request. A message box indicates that no leaves have been allotted for the current financial year. The central area displays a calendar for September 2016. A tooltip over the calendar says: 'Click on a date to apply for 1 day of leave. Click and drag on the desired dates to apply for multiple days of leave.' A search bar labeled 'Employee Reporting To Me' (highlighted with a red box, labeled 'c') contains the text 'ME'. An 'Apply Leave' button is located to the right of the search bar. The calendar grid shows dates from 28 to 31 of August, and 1 to 24 of September. The date '7' in September is highlighted with a yellow background, indicating it is selected or reported for.

Figure 54

- Click **Self Service** in the top menu
- Click **Leave Request** in the submenu
- Select the option 'Employee reporting to me'

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

Please refer Figure 55



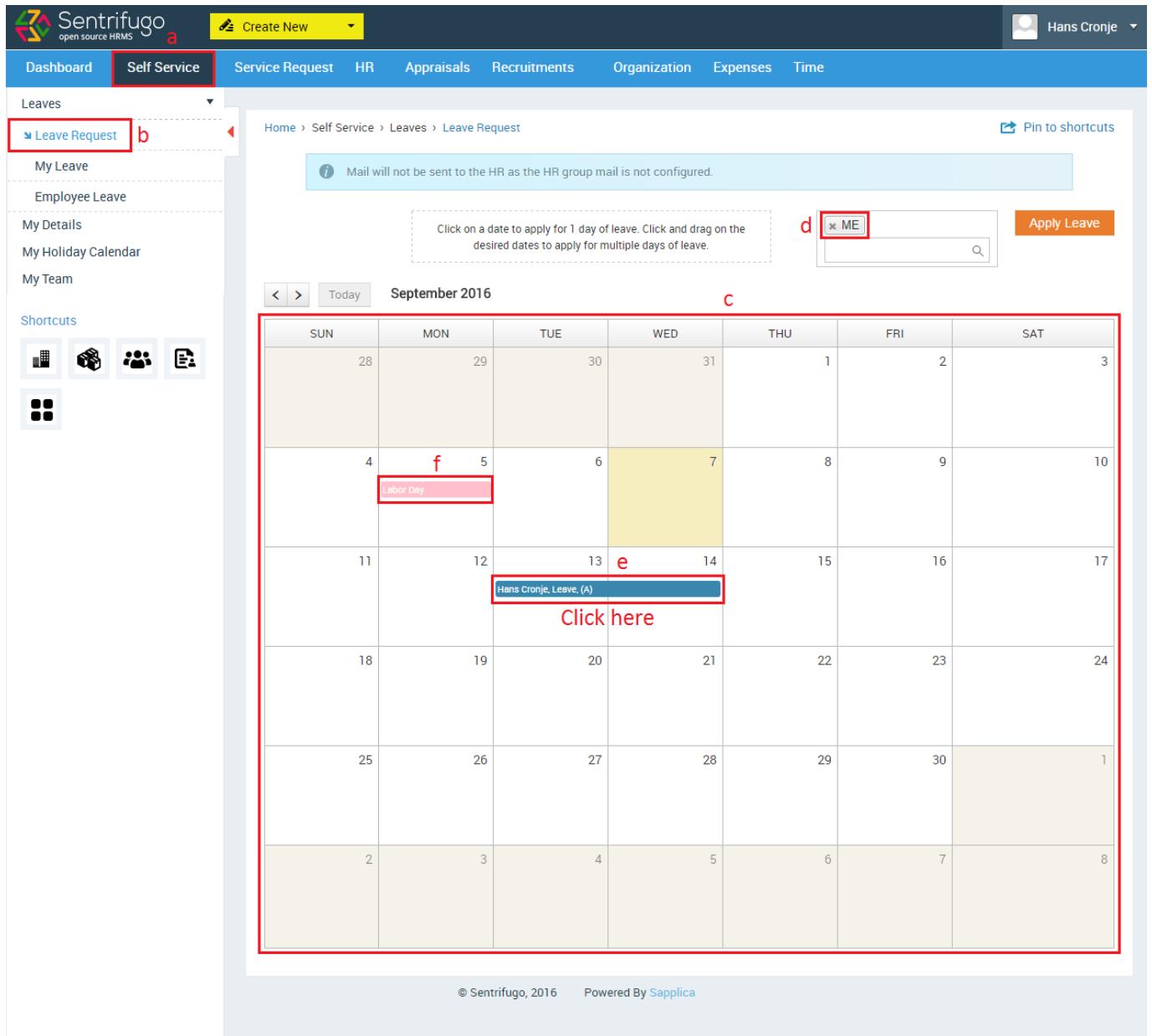
**Leaverequest**

Status	Comments		
Cancel	50 characters remaining (50 maximum)		
<b>SAVE</b>			
Employee	Hans Cronje	Leave Type	Sick
From	2016-09-13	To	2016-09-14
Leave For	Full Day	Days	2.0
Approved On	2016-Sep-07	Comments	

Figure 55

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

Please refer Figure 56



The screenshot shows the Sentrifugo self-service leave request interface. The top navigation bar includes the Sentrifugo logo, a 'Create New' button, and a user profile for 'Hans Cronje'. The main menu has tabs for Dashboard, Self Service (which is selected and highlighted with a red box), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. Under the 'Leaves' section of the left sidebar, 'Leave Request' is selected and highlighted with a red box. The central area displays a breadcrumb path: Home > Self Service > Leaves > Leave Request. A message states: 'Mail will not be sent to the HR as the HR group mail is not configured.' Below this is a calendar for September 2016. A tooltip on the calendar says: 'Click on a date to apply for 1 day of leave. Click and drag on the desired dates to apply for multiple days of leave.' A search bar with 'x ME' and an 'Apply Leave' button are also present. The calendar grid shows days from 28 to 30 of August, followed by days 1 through 31 of September. Specific days are highlighted: September 4th is red and labeled 'Labor Day'; September 13th is yellow and labeled 'Hans Cronje, Leave, (A)'; and September 14th is blue and labeled 'Click here'.

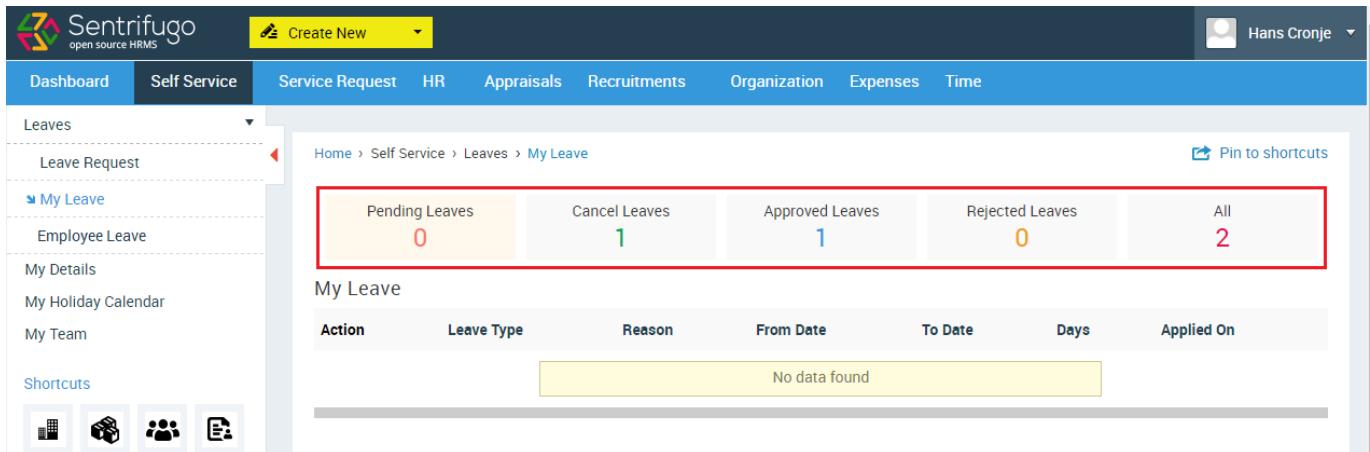
Figure 56

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

Your leaves requests will be categorized in to 5 types:

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

Please refer Figure 57

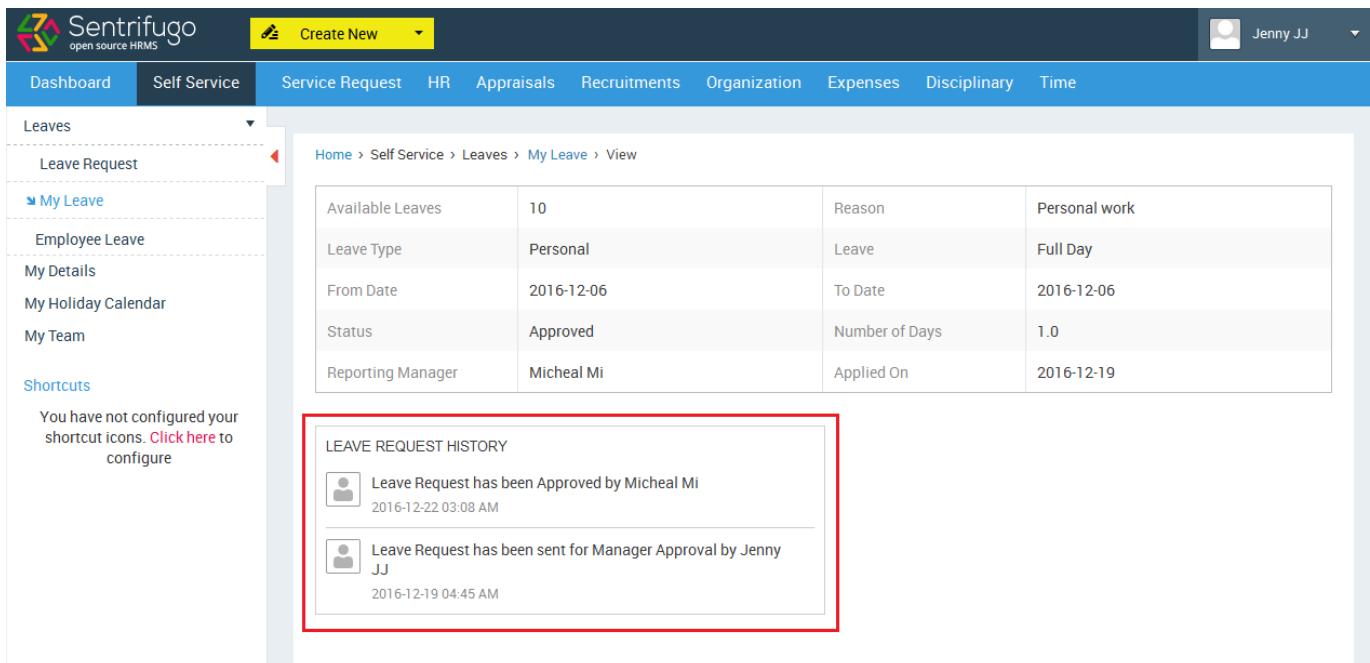


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes the logo, user name 'Hans Cronje', and a 'Create New' button. The main menu has tabs for Dashboard, Self Service (which is selected), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. On the left, a sidebar under 'Leaves' shows 'Leave Request' and 'My Leave' (selected). Below that are 'Employee Leave', 'My Details', 'My Holiday Calendar', and 'My Team'. A 'Shortcuts' section contains icons for building, file, users, and print. The central content area shows a breadcrumb path: Home > Self Service > Leaves > My Leave. It displays five categories with counts: Pending Leaves (0), Cancel Leaves (1), Approved Leaves (1), Rejected Leaves (0), and All (2). Below this is a table titled 'My Leave' with columns for Action, Leave Type, Reason, From Date, To Date, Days, and Applied On. A message 'No data found' is shown in the table body. A 'Pin to shortcuts' link is in the top right.

Figure 57

Click on any category to view the leaves accordingly.

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



This screenshot shows the same Sentrifugo interface as Figure 57, but for a different user named 'Jenny JJ'. The 'My Leave' section is selected in the sidebar. The central content area shows a table with leave details: Available Leaves (10), Leave Type (Personal), Reason (Leave), From Date (2016-12-06), To Date (2016-12-06), Status (Approved), Number of Days (1.0), Reporting Manager (Micheal Mi), and Applied On (2016-12-19). Below this is a red-bordered box labeled 'LEAVE REQUEST HISTORY' containing two entries: 'Leave Request has been Approved by Micheal Mi 2016-12-22 03:08 AM' and 'Leave Request has been sent for Manager Approval by Jenny JJ 2016-12-19 04:45 AM'.

### 3.11 How do I create Holiday Groups?

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

Please refer Figure 58

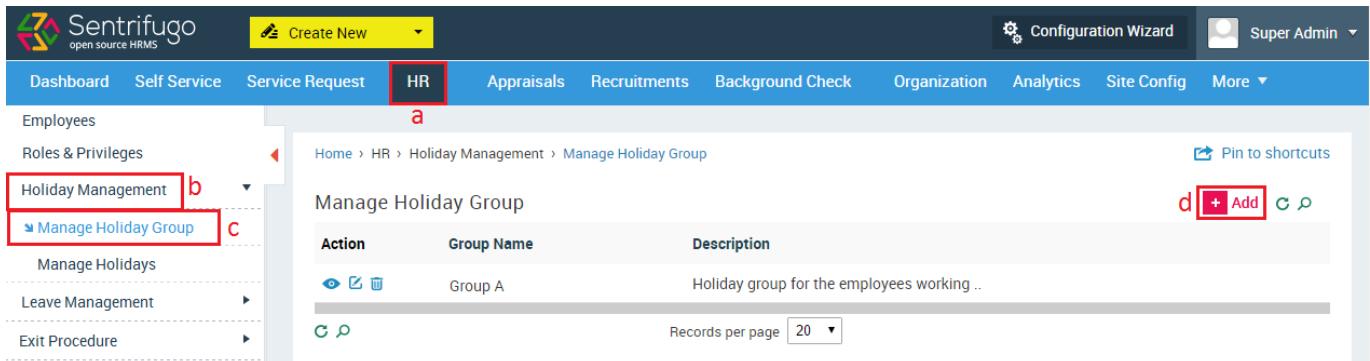


Figure 58

- Click **HR** in the top menu
- Click **Holiday Management** on the left menu panel
- Click **Manage Holiday Group** in the submenu
- Click **+Add** button

Please refer Figure 59

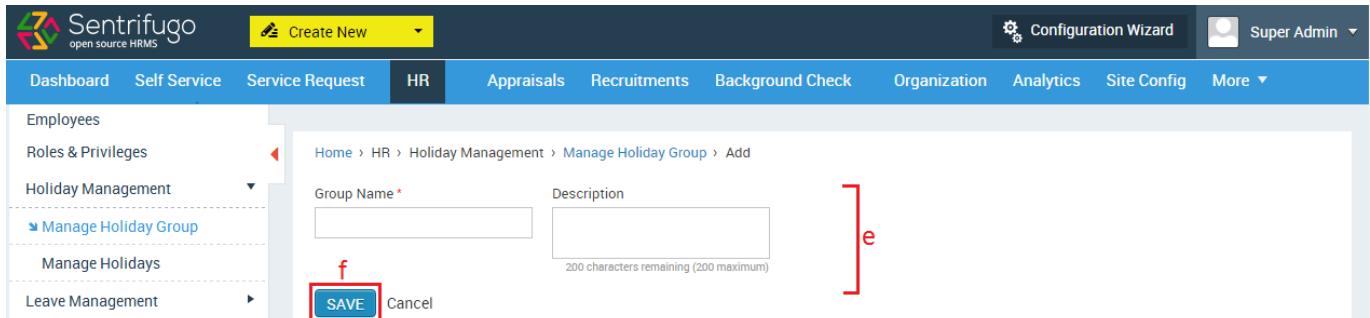
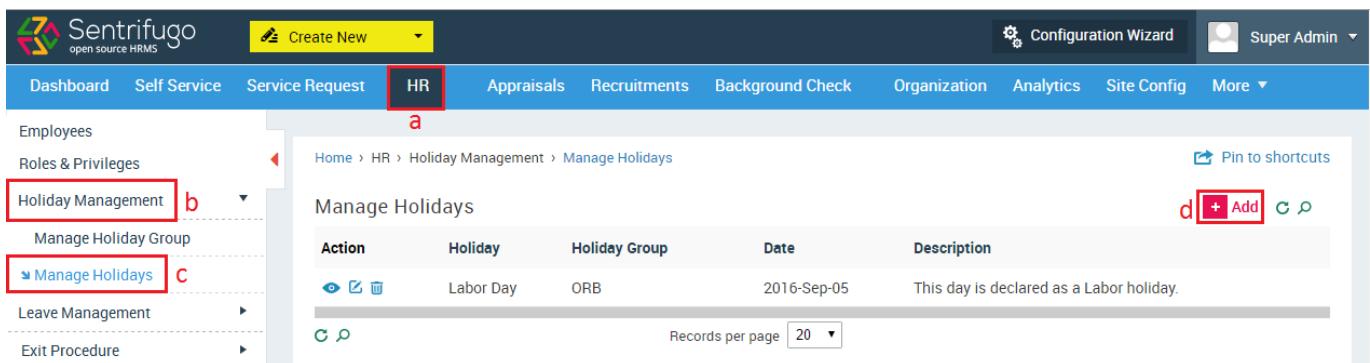


Figure 59

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

### 3.12 How do I create Holidays?

Please refer Figure 60

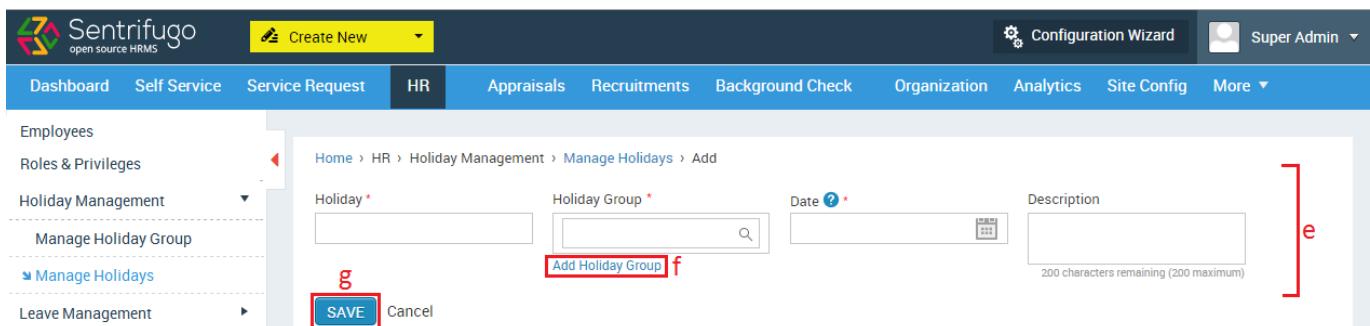


The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A dropdown menu for 'Create New' is open. On the right, there are links for Configuration Wizard and Super Admin. The left sidebar has sections for Employees, Roles & Privileges, Holiday Management (highlighted with a red box), Manage Holiday Group, Manage Holidays (highlighted with a red box and labeled 'c'), Leave Management, and Exit Procedure. The main content area shows a breadcrumb path: Home > HR > Holiday Management > Manage Holidays. It displays a table titled 'Manage Holidays' with columns: Action, Holiday, Holiday Group, Date, and Description. One row is listed: Labor Day, ORB, 2016-Sep-05, and 'This day is declared as a Labor holiday.' There are buttons for Pin to shortcuts, + Add (highlighted with a red box and labeled 'd'), and a search icon.

Figure 60

- Click **HR** in the top menu
- Click **Holiday Management** on the left menu panel
- Click **Manage Holidays** in the submenu
- Click **+Add** button

Please refer Figure 61



The screenshot shows the 'Add' form for 'Manage Holidays'. The top navigation bar and sidebar are identical to Figure 60. The main form has fields for Holiday (text input), Holiday Group (dropdown with a search icon and 'Add Holiday Group' link highlighted with a red box and labeled 'f'), Date (date picker), and Description (text area with a character count of 200). Buttons at the bottom include 'SAVE' (highlighted with a red box and labeled 'g') and 'Cancel'.

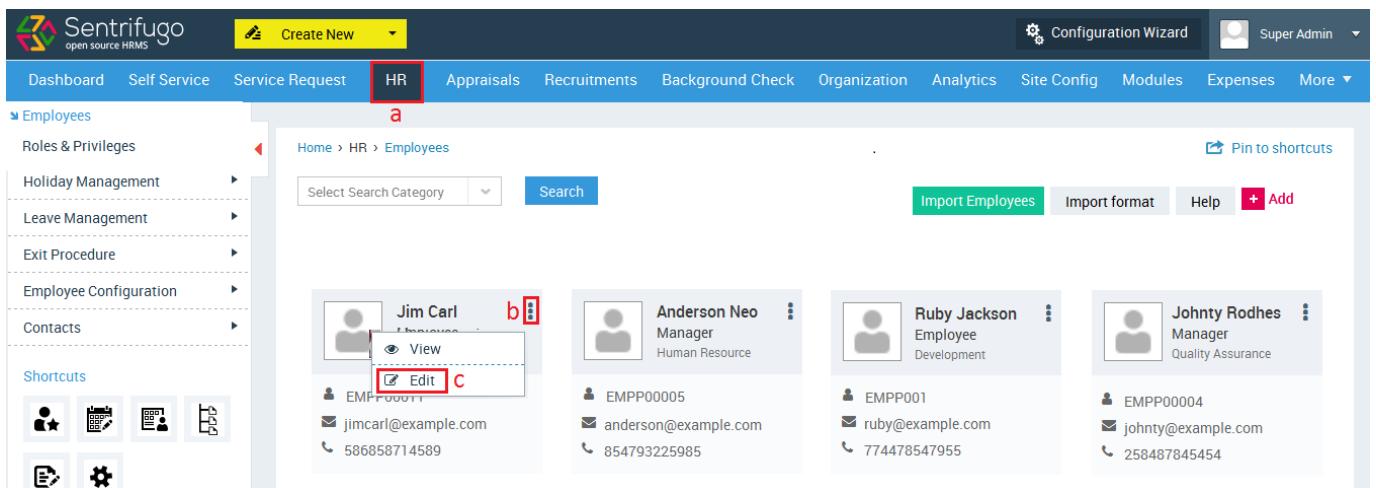
Figure 61

- Enter the required details
- Add a new Holiday Group
- Click **SAVE** button

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

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

Please refer Figure 62

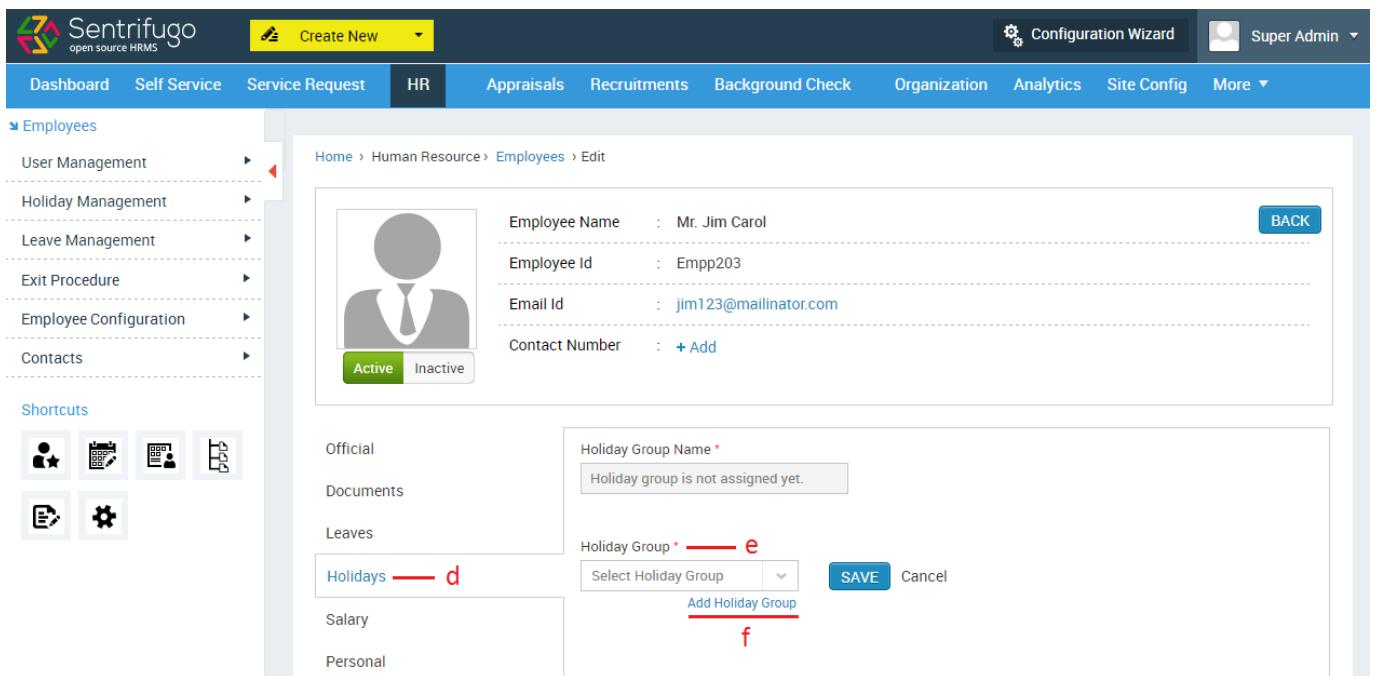


The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. On the left, a sidebar lists Employee Management, Holiday Management, Leave Management, Exit Procedure, Employee Configuration, and Contacts. Under Employee Management, there are sections for Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration, and Contacts, each with a 'More Actions' button. Below this is a 'Shortcuts' section with icons for User Management, Holiday Management, Leave Management, Exit Procedure, Employee Configuration, and Contacts. The main content area displays a list of employees. The first employee, Jim Carl, has a tooltip 'b' over his profile picture and a tooltip 'c' over the 'Edit' icon in the 'More Actions' dropdown. Other employees listed are Anderson Neo, Ruby Jackson, and Johnny Rodhes. Each employee card includes a 'View' link, their name, title, department, and contact information.

Figure 62

- Click **HR** in the top menu
- Click **More Actions** button in the Action column
- Click **Edit** icon

Please refer Figure 63

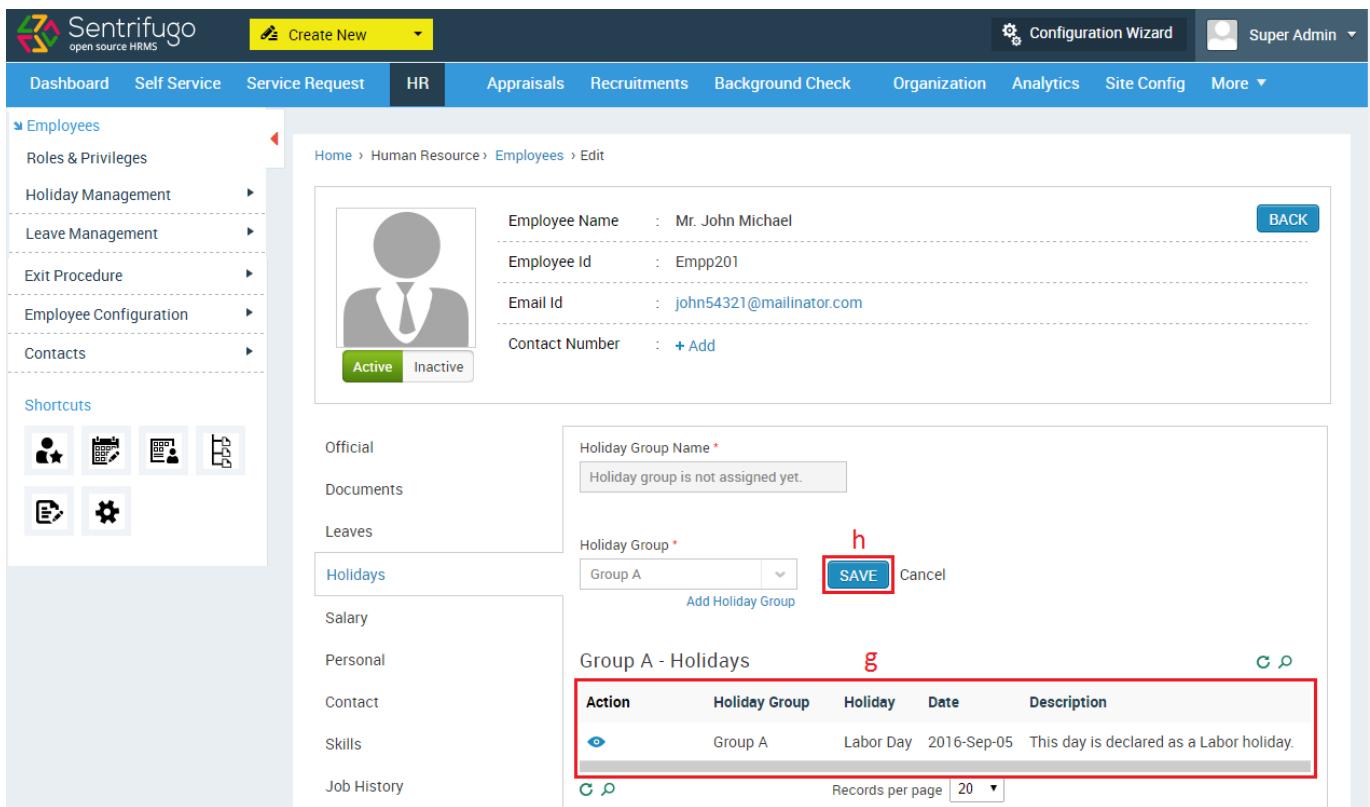


The screenshot shows the Sentrifugo HR module interface, specifically the 'Edit' screen for an employee. The top navigation bar is identical to Figure 62. The left sidebar shows the same structure. The main content area is titled 'Home > Human Resource > Employees > Edit'. It displays an employee profile with fields for Employee Name (Mr. Jim Carol), Employee Id (Empp203), Email Id (jim123@mailinator.com), and Contact Number (+ Add). Below this is a 'Holidays' tab (marked with a red box 'd'). The 'Official' section contains a 'Holiday Group Name' field with the placeholder 'Holiday group is not assigned yet.' The 'Leaves' section contains a 'Holiday Group' field with a dropdown menu labeled 'Select Holiday Group' and a 'Save' button. A tooltip 'e' points to the 'Holiday Group' field, and a tooltip 'f' points to the 'Add Holiday Group' button.

Figure 63

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

*Please refer Figure 64*



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, Create New (with a dropdown), Configuration Wizard, Super Admin, and more. The main menu on the left has sections for Employees, Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration, and Contacts. Shortcuts are also listed. The current page is 'Employees > Edit' for Mr. John Michael (Employee ID: Empp201). The 'Holidays' tab is active, showing a grid of holidays. One record is visible: Group A - Labor Day on 2016-Sep-05, with the description 'This day is declared as a Labor holiday.' The 'SAVE' button is highlighted with a red box and labeled 'h'. The 'Group A - Holidays' section is labeled 'g'.

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

Figure 64

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

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

## 4. Self Service

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

### 4.1 Leave Requests

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

### 4.2 How do I view My Details?

Please refer Figure 65

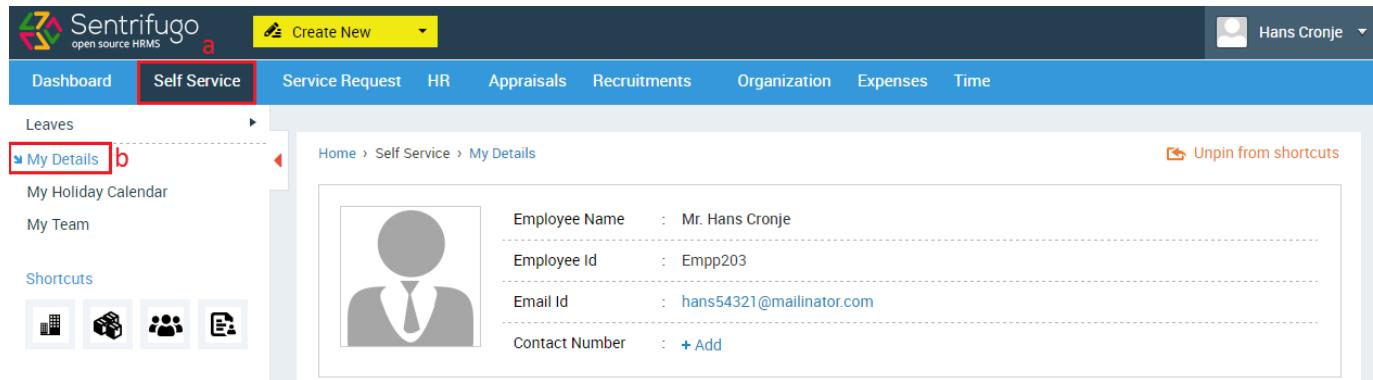


Figure 65

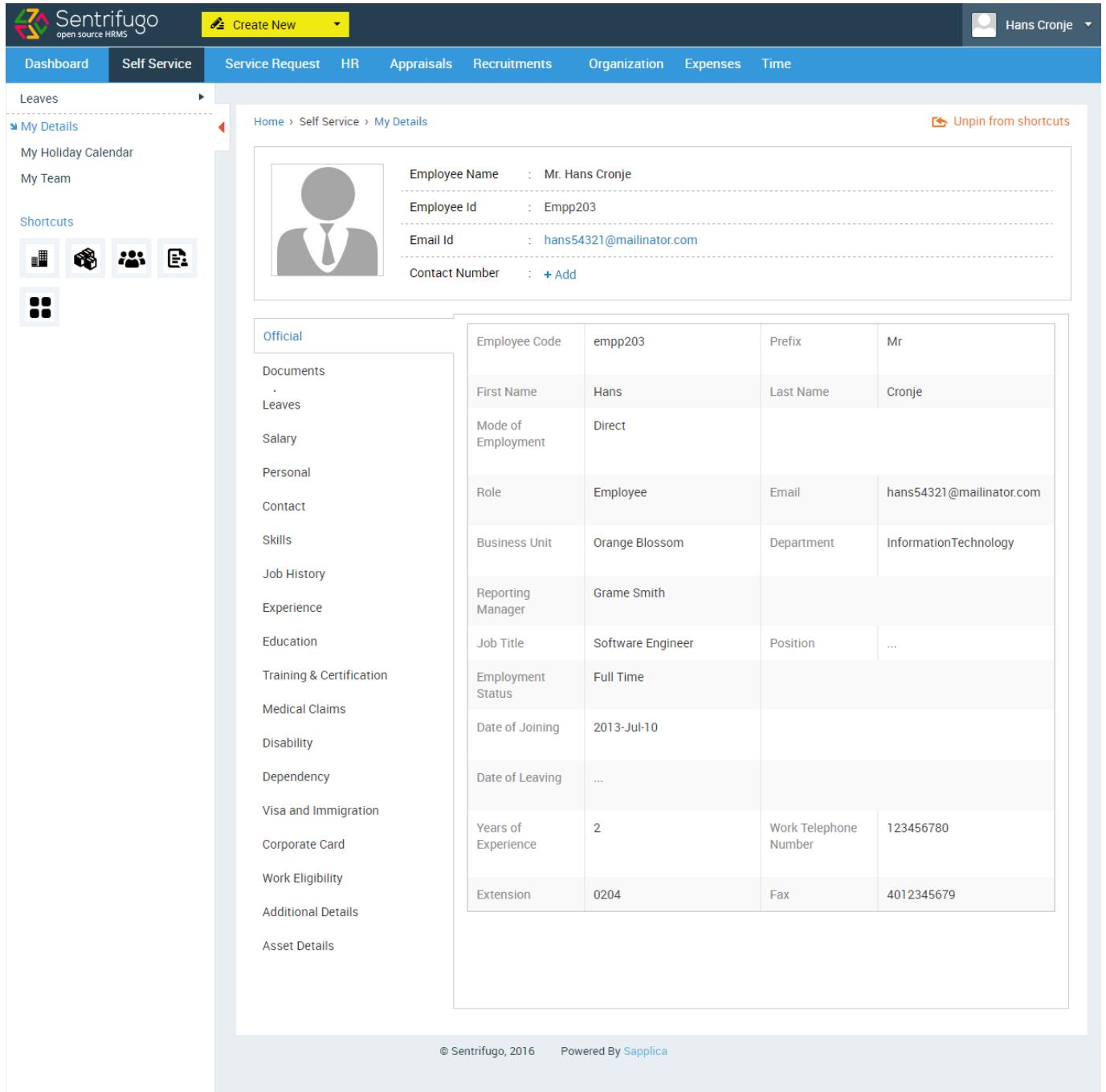
- Click **Self Service** in the top menu
- Click **My Details** on the left menu panel



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

## Official

Please refer Figure 66



The screenshot shows the Sentrifugo HRMS application interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. A 'Create New' button and a user profile for 'Hans Cronje' are also visible.

The main content area displays 'My Details' under the 'Self Service' tab. It includes a sidebar with 'Leaves', 'My Holiday Calendar', 'My Team', and 'Shortcuts' (with icons for Home, Employees, Tasks, and Reports). The main panel shows the employee's profile picture and basic information:

Employee Name	: Mr. Hans Cronje
Employee Id	: Emp203
Email Id	: hans54321@mailinator.com
Contact Number	: + Add

Below this, a large table titled 'Official' lists various personal and professional details:

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

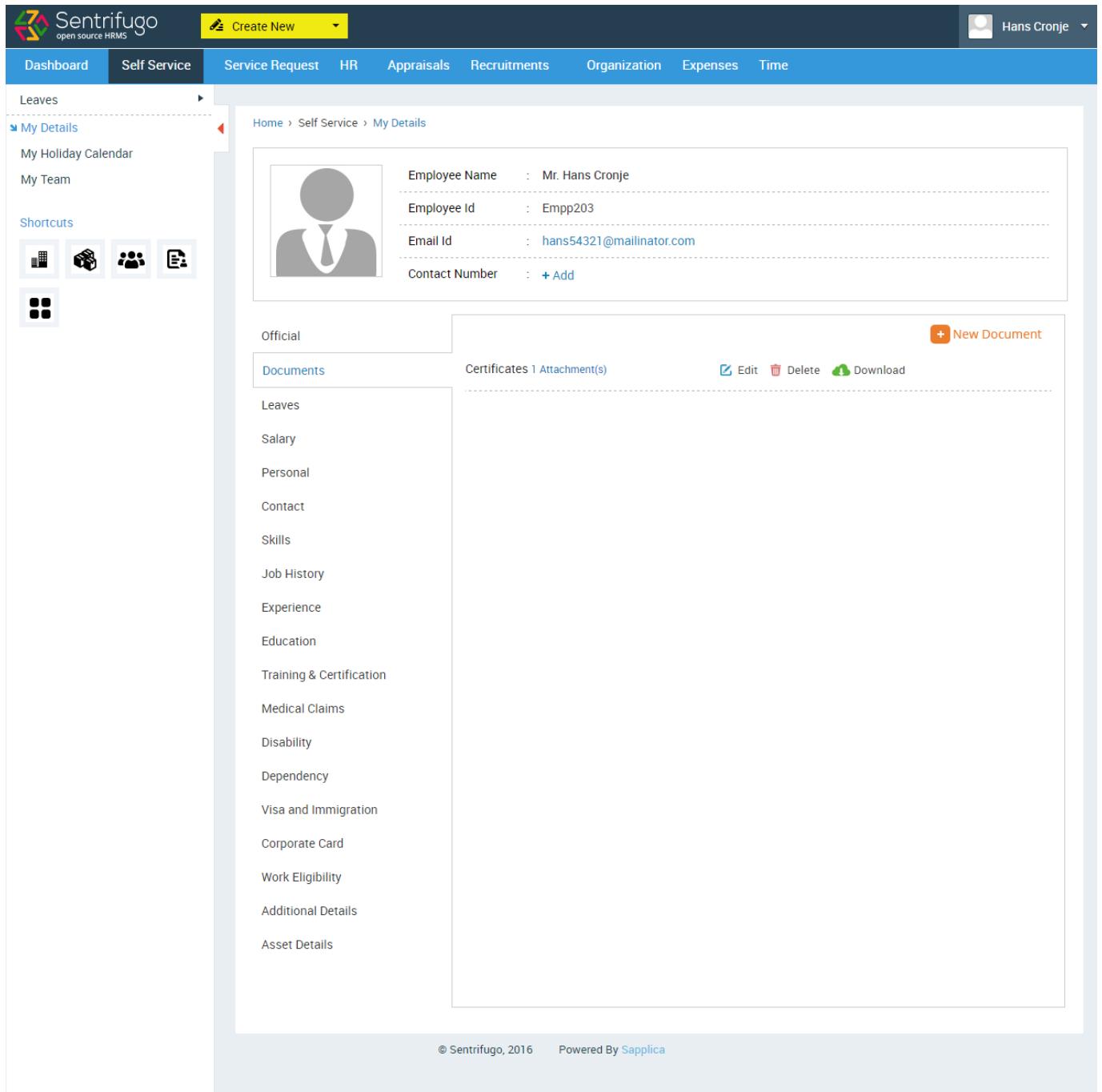
At the bottom of the page, there are copyright and power credits: © Sentrifugo, 2016 and Powered By [Sapplica](#).

Figure 66

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

## Documents

Please refer Figure 67



The screenshot shows the Sentrifugo open source HRMS interface. At the top, there is a navigation bar with links for Dashboard, Self Service (which is currently selected), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. A 'Create New' button and a user profile for 'Hans Cronje' are also visible.

The main content area displays 'My Details' information for 'Hans Cronje'. It includes a placeholder profile picture, employee details (Employee Name: Mr. Hans Cronje, Employee Id: EmpP203, Email Id: hans54321@mailinator.com, Contact Number: + Add), and a 'New Document' button.

A sidebar on the left lists 'Leaves', 'My Holiday Calendar', and 'My Team'. Below this is a 'Shortcuts' section with icons for Home, Self Service, My Details, and a search bar.

The central panel shows a list of document categories under 'Official': Leaves, Salary, Personal, Contact, Skills, Job History, Experience, Education, Training & Certification, Medical Claims, Disability, Dependency, Visa and Immigration, Corporate Card, Work Eligibility, Additional Details, and Asset Details.

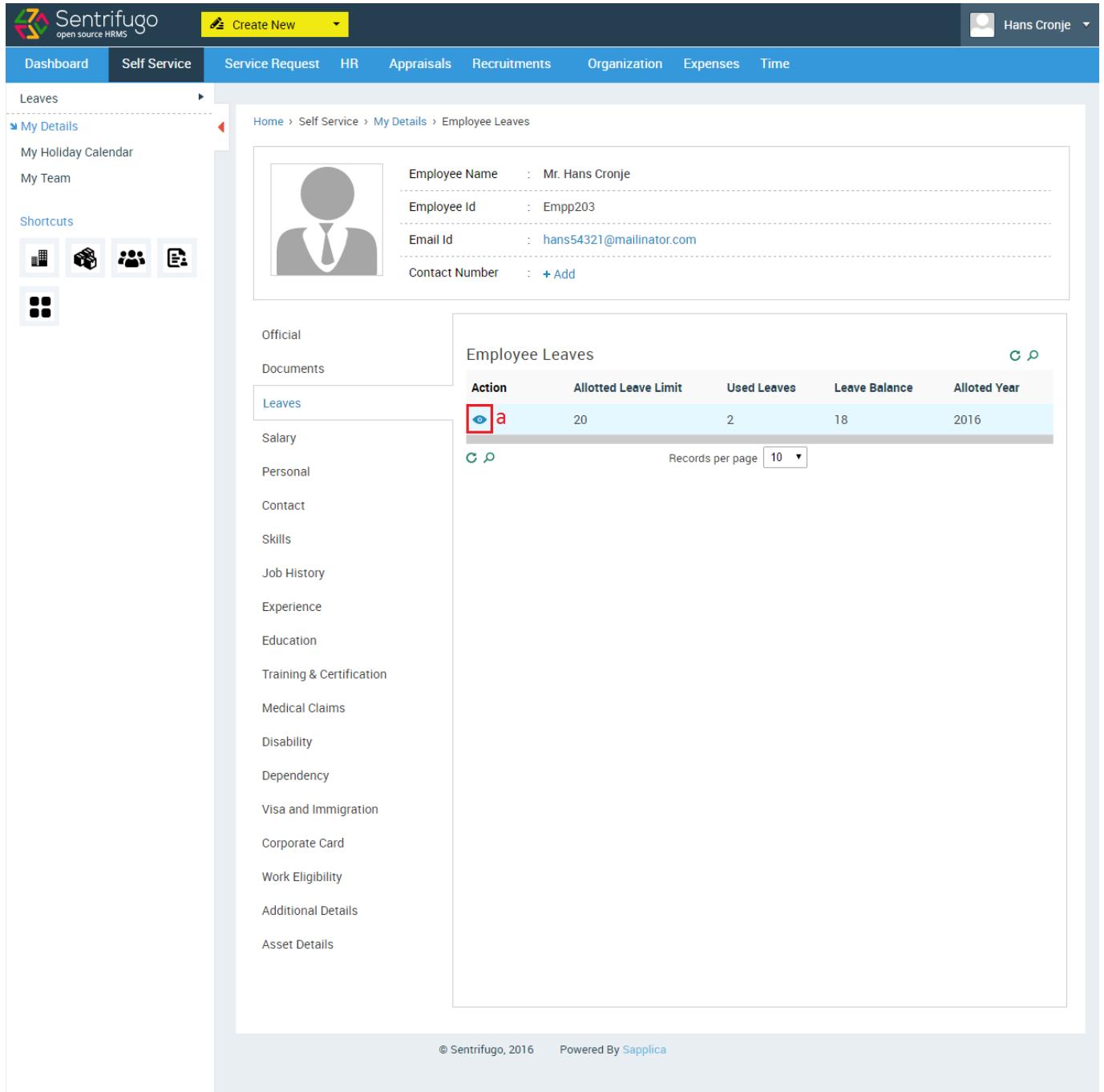
At the bottom of the page, there is a footer with copyright information: © Sentrifugo, 2016 and Powered By [Sapplica](#).

Figure 67

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

## Leaves

Please refer Figure 68



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

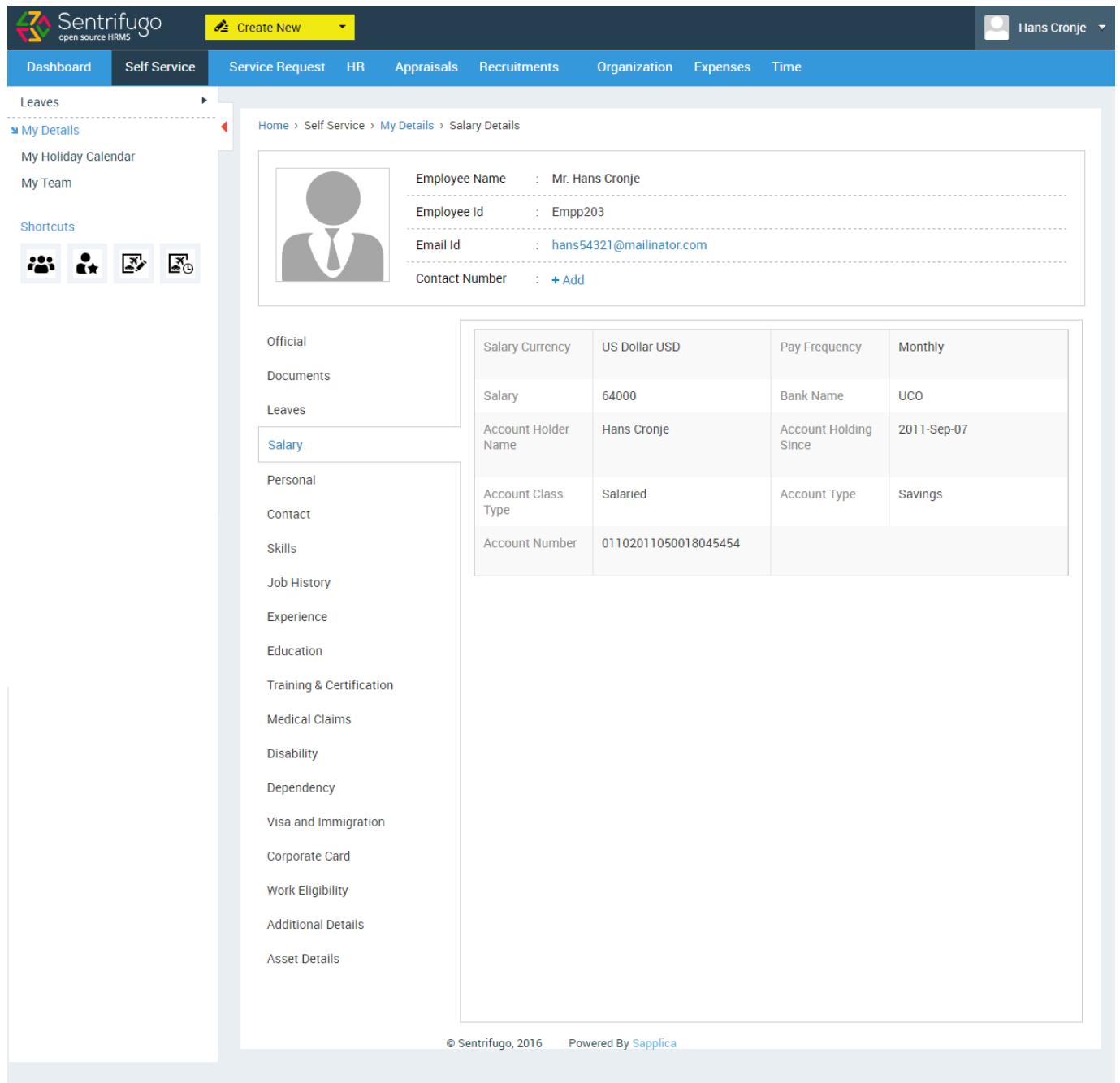
Figure 68

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

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

## Salary

Please refer Figure 69



The screenshot shows the Sentrifugo open source HRMS interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. A 'Create New' button and a user profile for 'Hans Cronje' are also visible.

The main content area displays the 'Salary Details' page for 'Mr. Hans Cronje'. It includes a profile picture placeholder and a table with the following data:

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

On the left side, there is a sidebar with various links under 'My Details' and 'Shortcuts' sections. The 'Salary' link under 'My Details' is currently selected. Other links include Official, Documents, Leaves, Personal, Contact, Skills, Job History, Experience, Education, Training & Certification, Medical Claims, Disability, Dependency, Visa and Immigration, Corporate Card, Work Eligibility, Additional Details, and Asset Details.

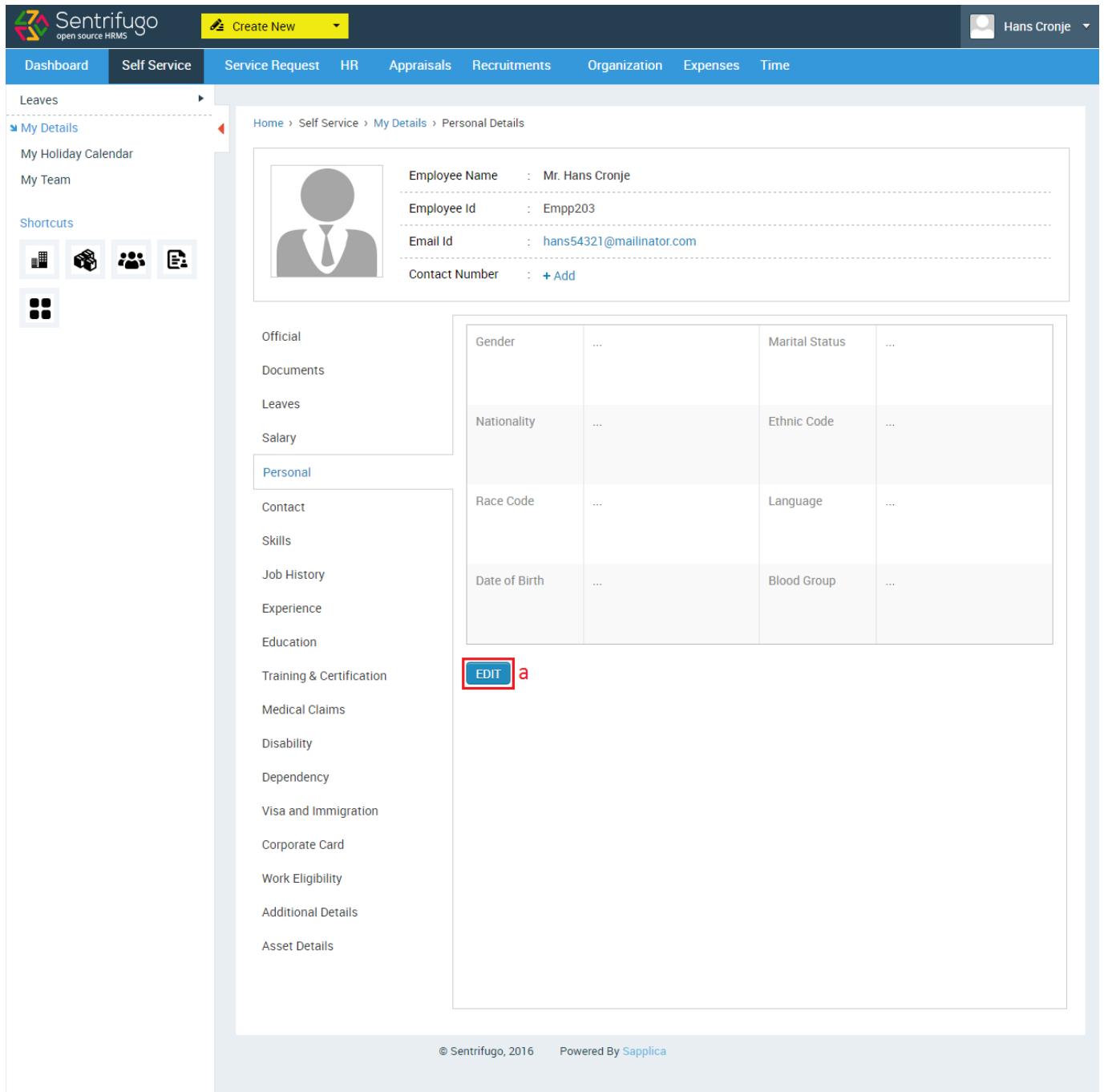
At the bottom of the page, there are copyright and power information: © Sentrifugo, 2016 and Powered By Sapplica.

Figure 69

You can view your salary and account details.

## Personal

Please refer Figure 70



The screenshot shows the Sentrifugo open source HRMS application interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. A 'Create New' button and a user profile for 'Hans Cronje' are also visible.

The main content area shows a breadcrumb path: Home > Self Service > My Details > Personal Details. On the left, a sidebar lists various categories: Leaves, My Details (selected), My Holiday Calendar, My Team, Shortcuts (with icons for Dashboard, Home, My Details, and Help), and a grid icon.

The 'Personal Details' section displays the following employee information:

Employee Name	:	Mr. Hans Cronje
Employee Id	:	EmpP203
Email Id	:	hans54321@mailinator.com
Contact Number	:	+ Add

Below this, there is a grid for personal details:

Official	Gender	...	Marital Status	...
Documents	Nationality	...	Ethnic Code	...
Leaves	Race Code	...	Language	...
Salary	Date of Birth	...	Blood Group	...

A red box highlights the 'EDIT' button in the 'Personal' section of the sidebar, with a label 'a' positioned next to it.

At the bottom of the page, there is a footer with the text: © Sentrifugo, 2016 Powered By Sapplica

Figure 70

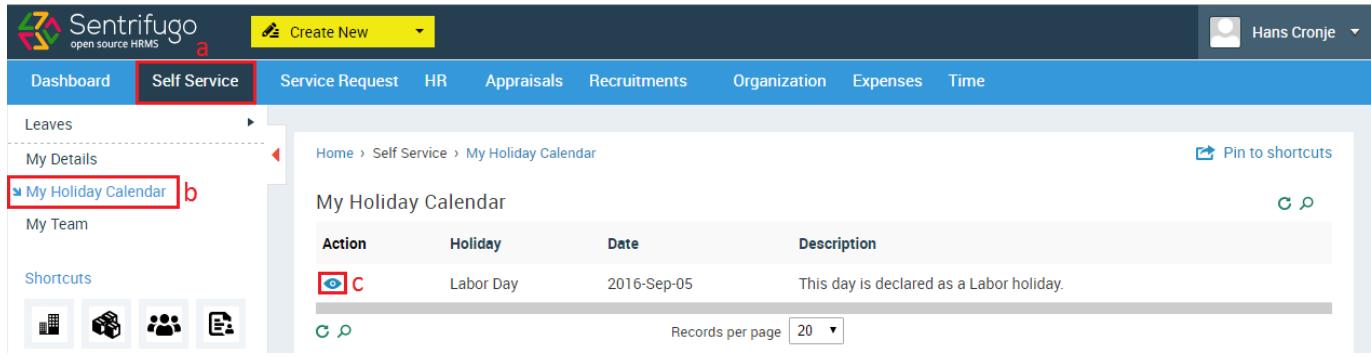
- Click **Edit icon** to add or modify any details

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

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

## 4.3 How do I view My Holiday Calendar?

Please refer Figure 71



The screenshot shows the Sentrifugo web application interface. At the top, there is a navigation bar with the logo, a 'Create New' button, and a user profile for 'Hans Cronje'. Below the navigation bar is a blue header menu with tabs: Dashboard, Self Service (which is highlighted with a red box), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. On the left side, there is a sidebar with links: Leaves, My Details, My Holiday Calendar (which is highlighted with a red box), My Team, and Shortcuts. Under Shortcuts, there are four icons: a building, a person, a group, and a document. The main content area displays a table titled 'My Holiday Calendar' with the following data:

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

At the bottom of the table, there are buttons for 'Records per page' (set to 20) and a search bar. To the right of the table, there are two small icons: a pin and a magnifying glass.

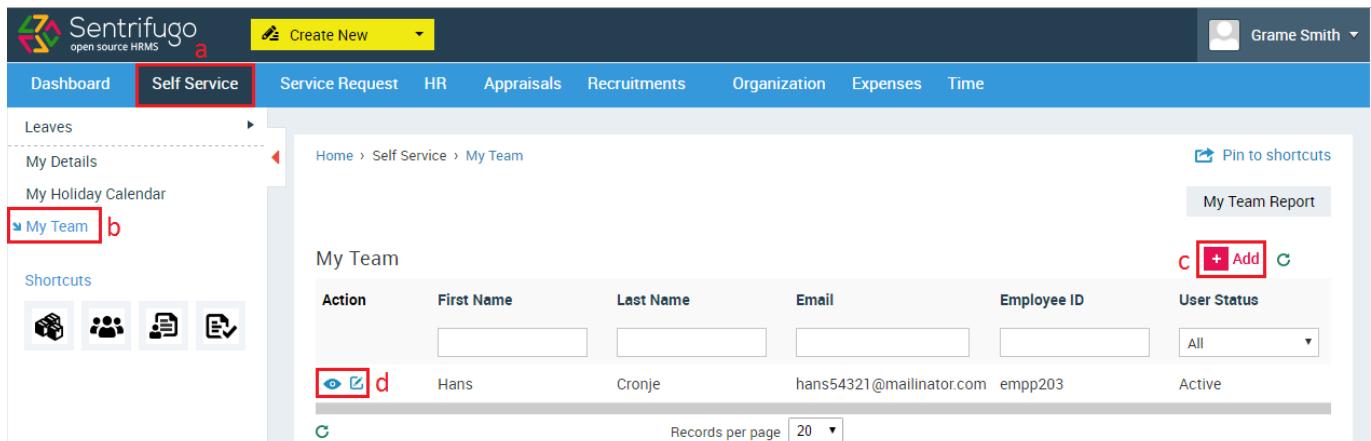
Figure 71

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

## 4.4 How do I view My Team details?

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

Please refer Figure 72



The screenshot shows the Sentrifugo web application interface. At the top, there is a navigation bar with the logo, a 'Create New' button, and a user profile for 'Grame Smith'. Below the navigation bar is a blue header menu with tabs: Dashboard, Self Service (which is highlighted with a red box), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. On the left side, there is a sidebar with links: Leaves, My Details, My Holiday Calendar, and My Team (which is highlighted with a red box). Under Shortcuts, there are four icons: a building, a person, a group, and a document. The main content area displays a table titled 'My Team' with the following data:

Action	First Name	Last Name	Email	Employee ID	User Status
	Hans	Cronje	hans54321@mailinator.com	empp203	Active

At the bottom of the table, there are buttons for 'Records per page' (set to 20) and a search bar. To the right of the table, there are three small icons: a plus sign for 'Add', a green checkmark, and a magnifying glass.

Figure 72

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

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

Or

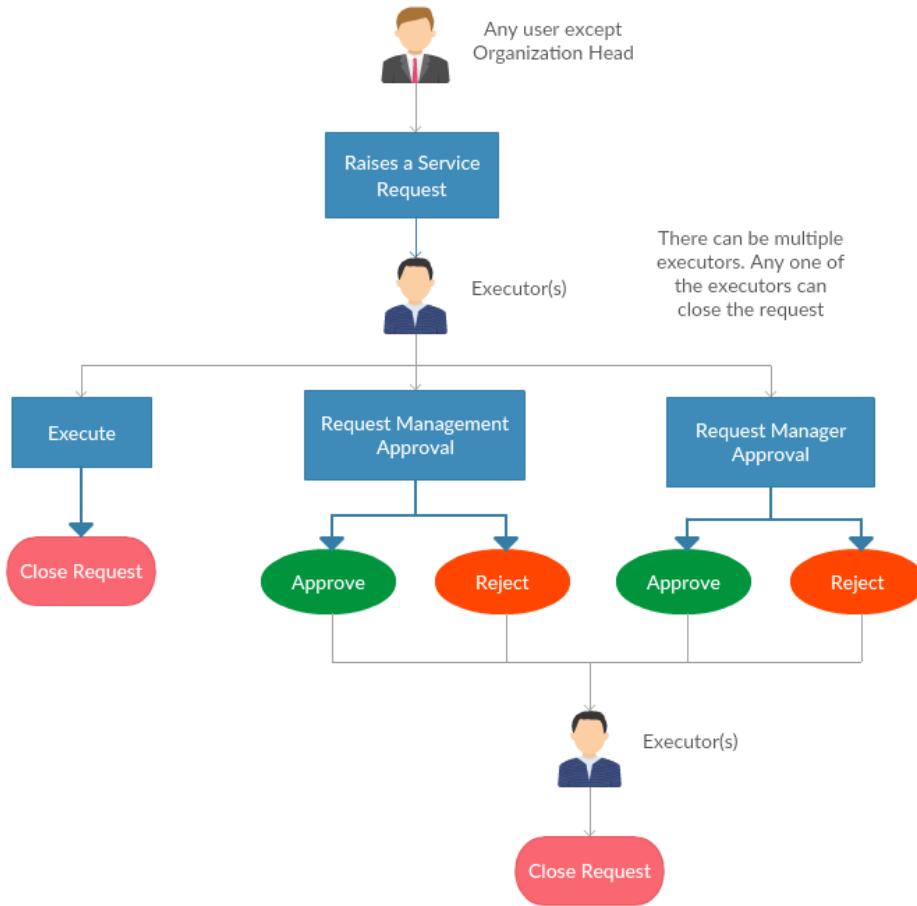
- d. Click **View/Edit** icon to view or edit employee details



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

## 5. Service Request

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



### Description:

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

## 5.1 How do I create Service Request Categories?

Please refer Figure 73

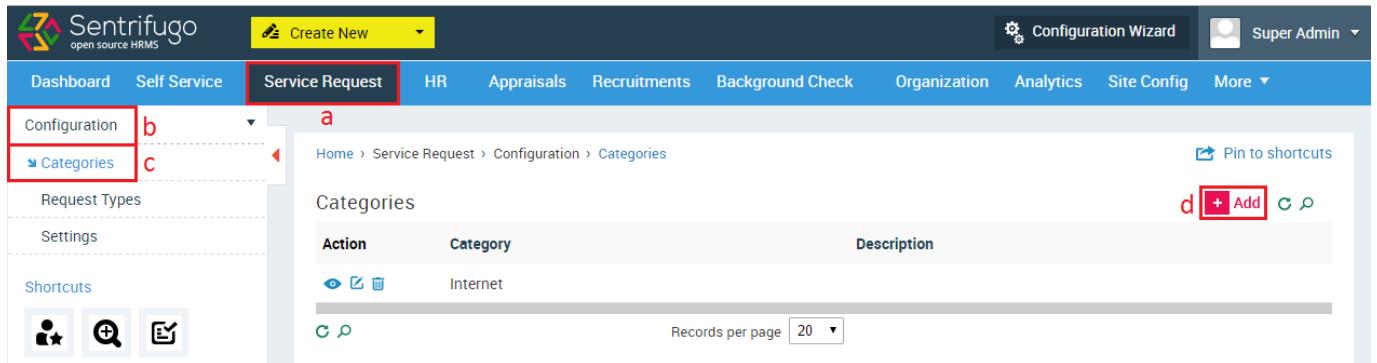


Figure 73

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

Please refer Figure 74

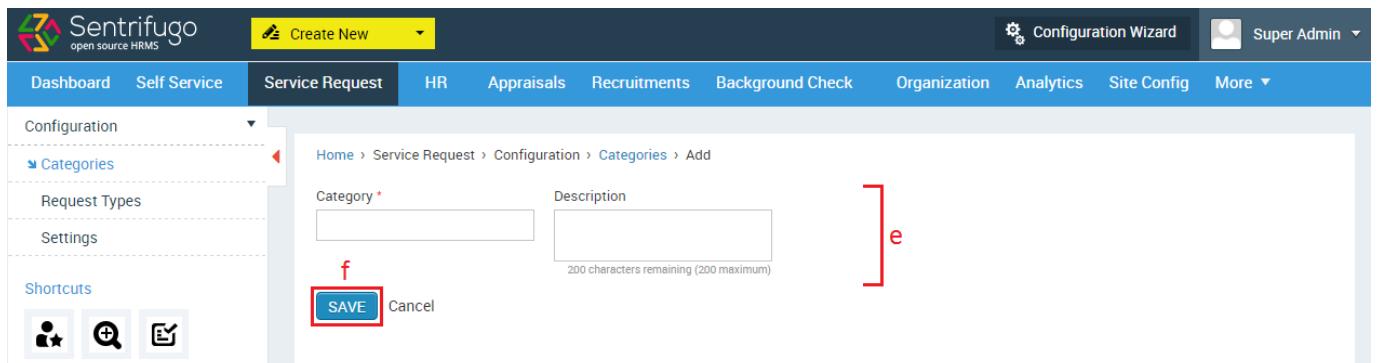
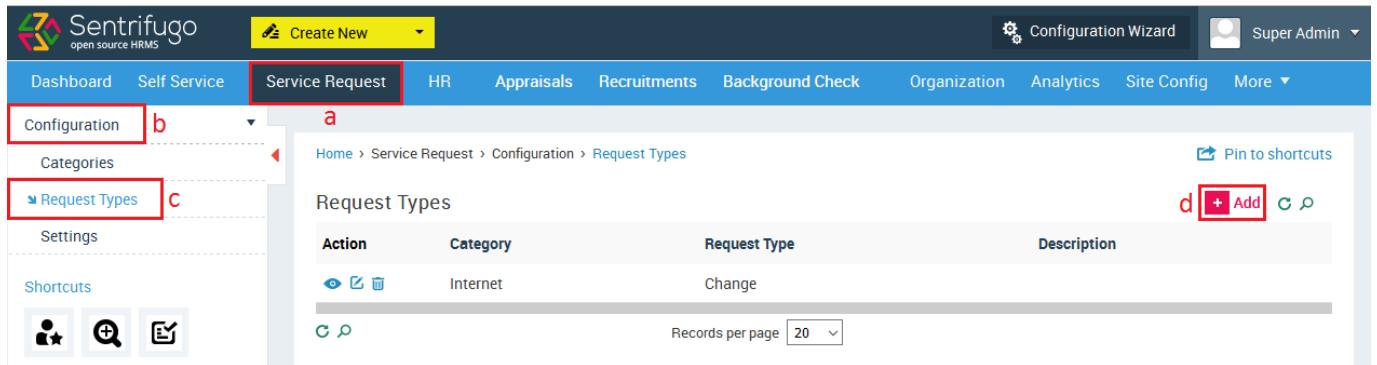


Figure 74

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

## 5.2 How do I create Service Request Types?

Please refer Figure 75



The screenshot shows the Sentrifugo interface. The top navigation bar includes 'Create New' (dropdown), 'Configuration Wizard', and 'Super Admin'. The main menu has tabs: Dashboard, Self Service, Service Request (highlighted with a red box), HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A left sidebar has 'Configuration' (highlighted with a red box) expanded, showing 'Categories', 'Request Types' (highlighted with a red box), and 'Settings'. Below the sidebar are 'Shortcuts' with icons. The central content area shows 'Request Types' with a table:

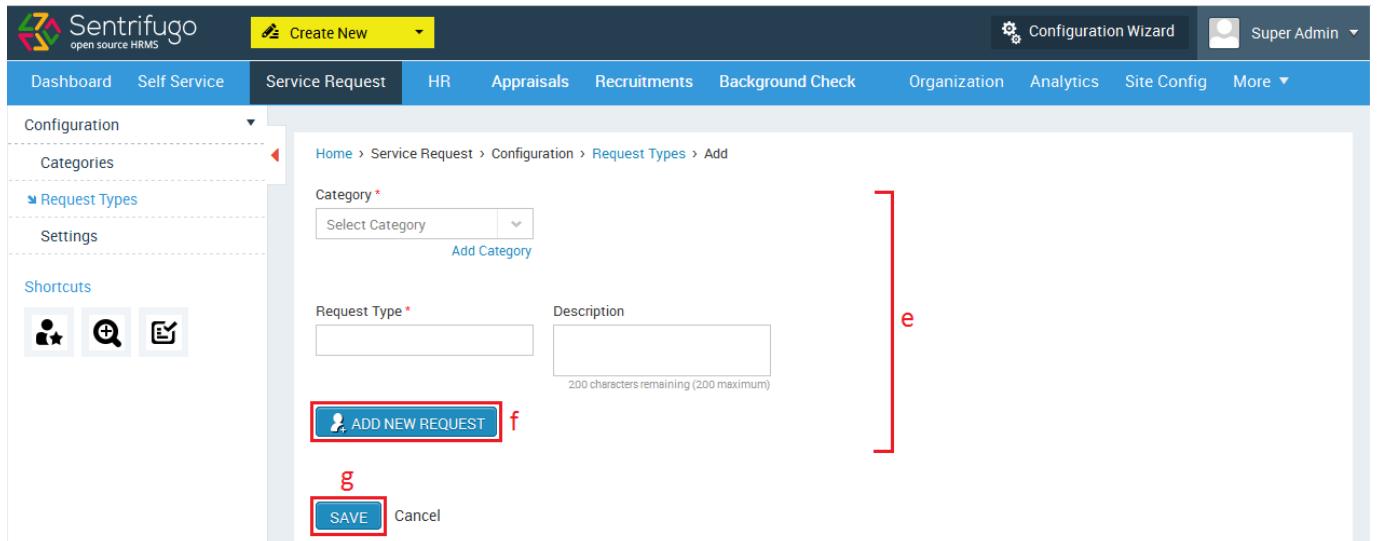
Action	Category	Request Type	Description
	Internet	Change	

Buttons at the bottom right include '+ Add' (highlighted with a red box), 'Pin to shortcuts', and other icons. The URL in the browser is 'Home > Service Request > Configuration > Request Types'.

Figure 75

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

Please refer Figure 76



The screenshot shows the 'Add' sub-page for 'Request Types'. The left sidebar is identical to Figure 75. The central content area has a form:

Category \*: Select Category (dropdown) and Add Category button. A red bracket labeled 'e' points to the right side of the form area.

Request Type \*: Input field and Description input field (with note: 200 characters remaining (200 maximum)).

Buttons at the bottom include ' ADD NEW REQUEST' (highlighted with a red box), 'SAVE' (highlighted with a red box), and 'Cancel'. The URL in the browser is 'Home > Service Request > Configuration > Request Types > Add'.

Figure 76

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

## 5.3 How do I configure Service Request settings?

Please refer Figure 77

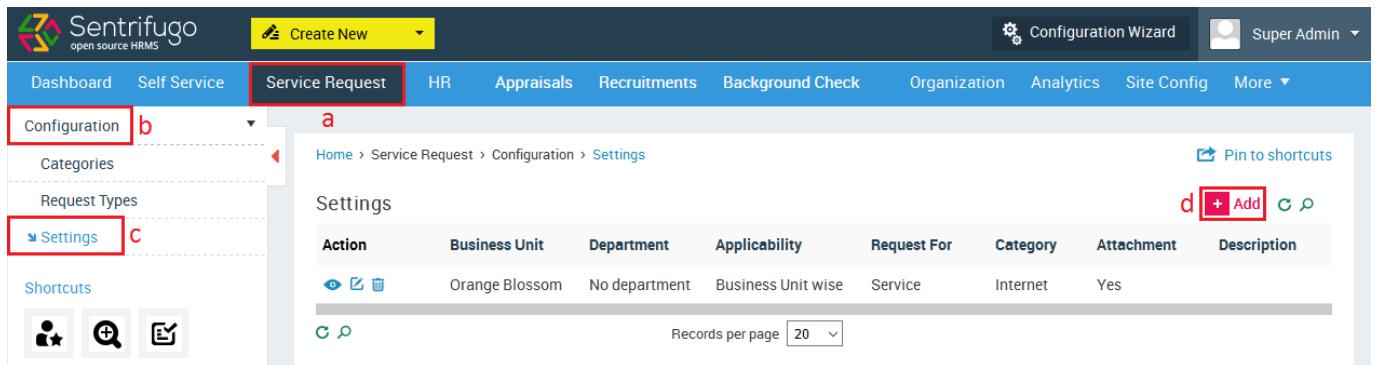


Figure 77

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

Please refer Figure 78

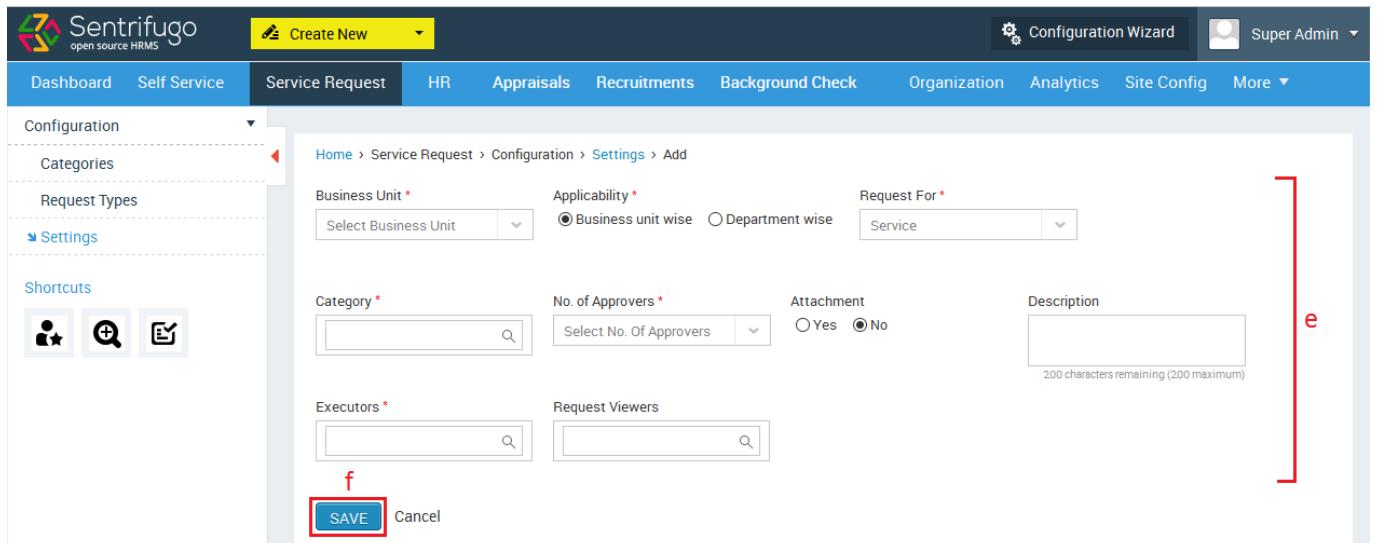


Figure 78

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

## 5.4 Who are Approvers, Executors and Viewers?

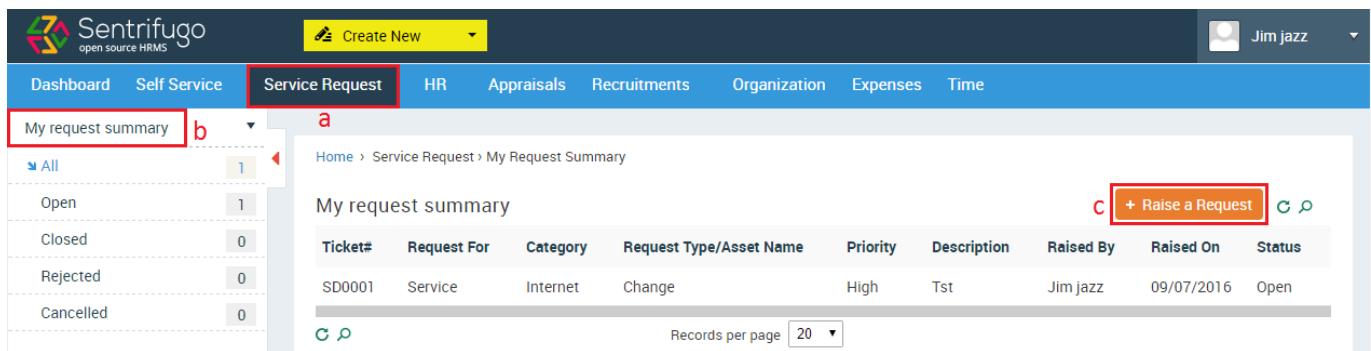
**Approvers \*Management\***: They are responsible for providing approval for service requests. Executor(s) send a request for approval to the Approver(s). You can have a maximum of 3 approvers and a minimum of 1 approver.

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

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

## 5.5 How do I raise a Service Request?

Please refer Figure 79

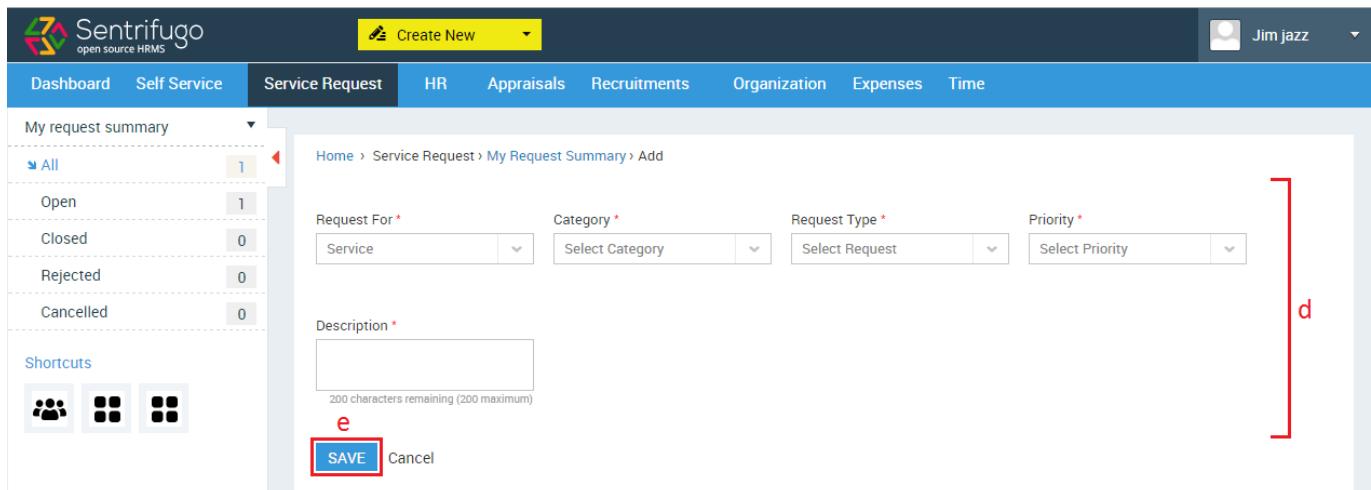


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request (which is highlighted), HR, Appraisals, Recruitments, Organization, Expenses, and Time. A user profile for 'Jim jazz' is shown on the right. The main content area has a sidebar on the left with 'My request summary' and a list of status filters: All (1), Open (1), Closed (0), Rejected (0), and Cancelled (0). The main panel displays a table titled 'My request summary' with columns: Ticket#, Request For, Category, Request Type/Asset Name, Priority, Description, Raised By, Raised On, and Status. One row is visible: SD0001, Service, Internet, Change, High, Tst, Jim jazz, 09/07/2016, Open. At the bottom of this panel is a 'Records per page' dropdown set to 20. To the right of the main panel is a large red box labeled 'a' containing the '+ Raise a Request' button. Below the main panel is another red box labeled 'c'.

Figure 79

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

Please refer Figure 80



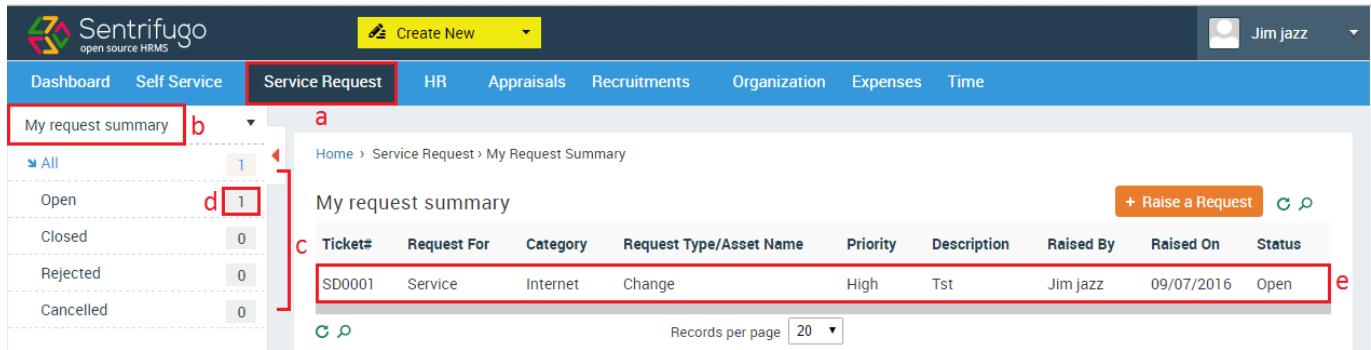
The screenshot shows the Sentrifugo HRMS interface with the 'Service Request' tab selected. The sidebar on the left includes 'My request summary' and 'Shortcuts'. The main panel shows a form titled 'My Request Summary > Add'. The form fields are: 'Request For' (Service), 'Category' (Select Category), 'Request Type' (Select Request), and 'Priority' (Select Priority). Below these is a 'Description' field with a note '200 characters remaining (200 maximum)'. At the bottom of the form are 'SAVE' and 'Cancel' buttons. A red bracket labeled 'd' points to the right side of the form, and a red box labeled 'e' points to the 'SAVE' button.

Figure 80

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

## 5.6 How do I view my Service Requests?

Please refer Figure 81



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

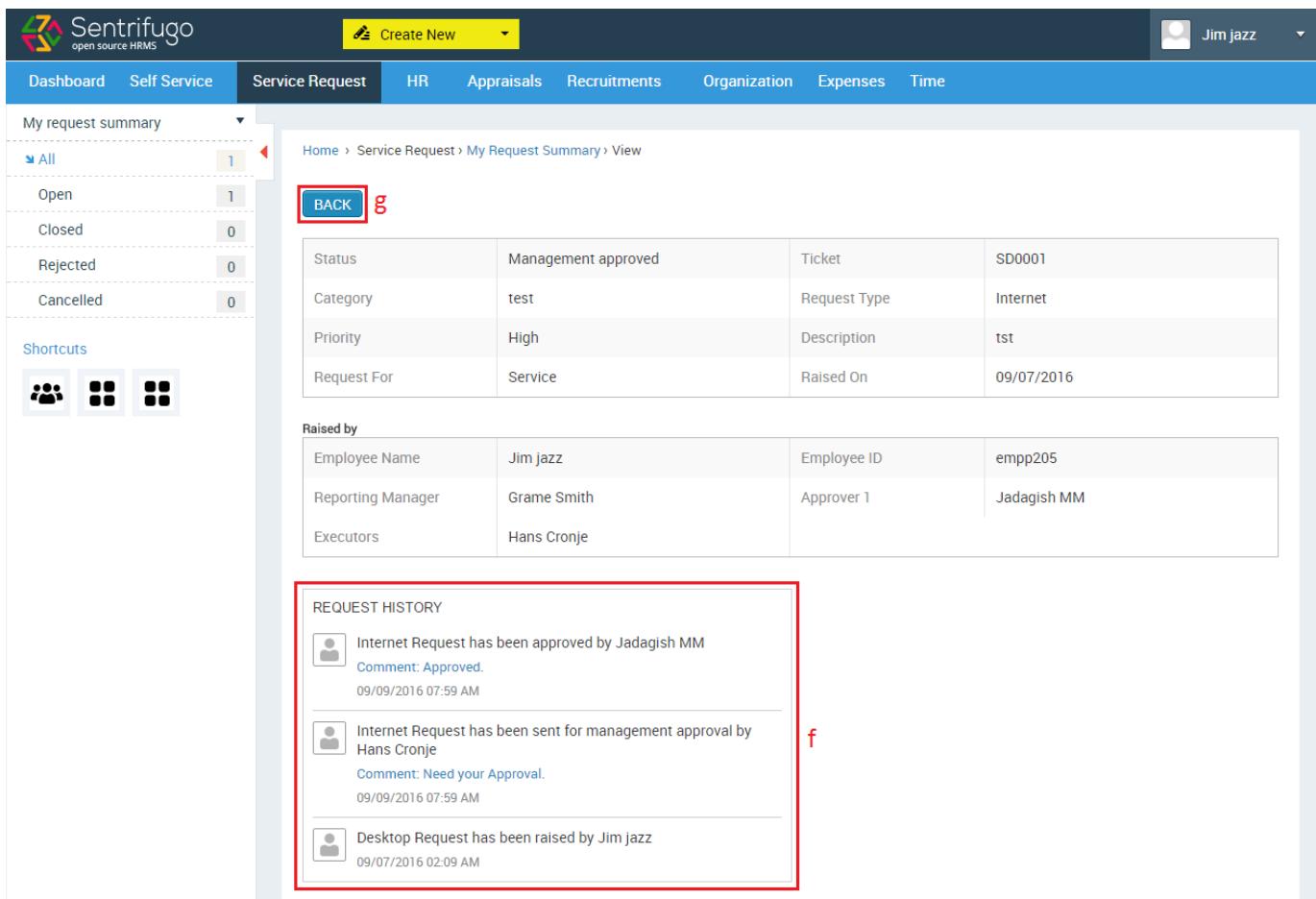
Figure 81

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

Service Requests have been categorized on basis of their statuses:

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

Please refer Figure 82



The screenshot shows the Sentrifugo open source HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request (which is selected), HR, Appraisals, Recruitments, Organization, Expenses, and Time. A user profile for Jim jazz is shown on the right. The main content area displays a "My request summary" section with a table showing 1 open request. Below this is a "Shortcuts" section with icons for users, reports, and help. The central panel shows a "Service Request > My Request Summary > View" page. It includes a "BACK" button, a "REQUEST HISTORY" section (highlighted with a red box) containing three entries, and a table with details like Status, Category, Priority, Request For, Ticket, Request Type, Description, and Raised On. The "REQUEST HISTORY" section contains the following entries:

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

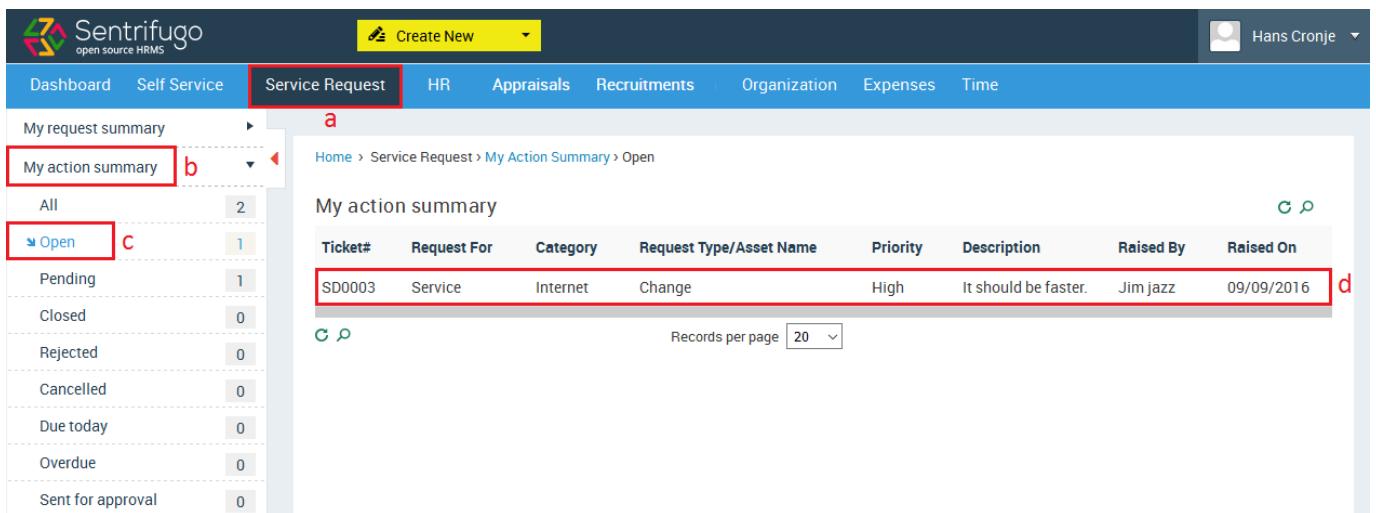
Figure 82

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

## 5.7 How do I execute a Service Request?

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

Please refer Figure 83



The screenshot shows the Sentrifugo web application interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request (which is highlighted with a red box and labeled 'a'), HR, Appraisals, Recruitments, Organization, Expenses, and Time. A 'Create New' button is also present. On the right side of the header, there is a user profile for 'Hans Cronje'. Below the header, a sidebar on the left contains sections for 'My request summary' and 'My action summary' (also highlighted with a red box and labeled 'b'). The 'My action summary' section has a submenu with items: All (2), Open (1), Pending (1), Closed (0), Rejected (0), Cancelled (0), Due today (0), Overdue (0), and Sent for approval (0). The main content area displays a table titled 'My action summary' with columns: Ticket#, Request For, Category, Request Type/Asset Name, Priority, Description, Raised By, and Raised On. One record is listed: SD0003, Service, Internet, Change, High Priority, 'It should be faster.' description, Jim jazz Raised By, and 09/09/2016 Raised On. There are also 'C' and 'D' labels near the top right of the content area.

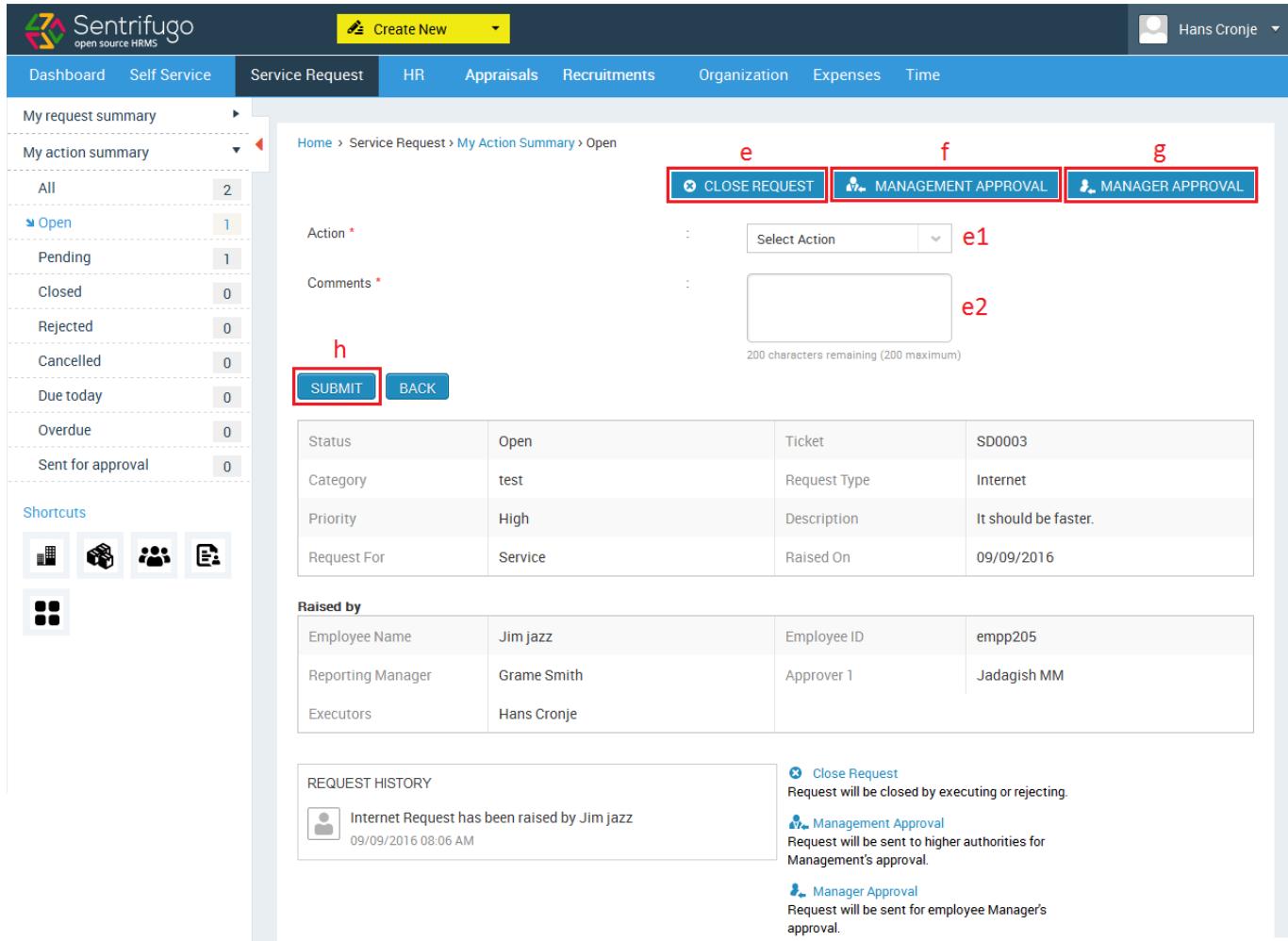
Figure 83

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



The actual execution takes place offline.

Please refer Figure 84



The screenshot shows the Sentrifugo Service Request interface. On the left, there's a sidebar with 'My request summary' (containing sections for All, Open, Pending, Closed, Rejected, Cancelled, Due today, Overdue, and Sent for approval) and 'Shortcuts'. The main content area shows a service request with the following details:

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

Below this is a 'Raised by' section with fields for Employee Name (Jim jazz), Reporting Manager (Grame Smith), and Executors (Hans Cronje). At the bottom left is a 'REQUEST HISTORY' box showing a recent entry from Jim jazz. At the top right, there are three buttons: 'CLOSE REQUEST' (labeled e), 'MANAGEMENT APPROVAL' (labeled f), and 'MANAGER APPROVAL' (labeled g). A 'SUBMIT' button (labeled h) is located at the bottom left of the main form area.

Figure 84

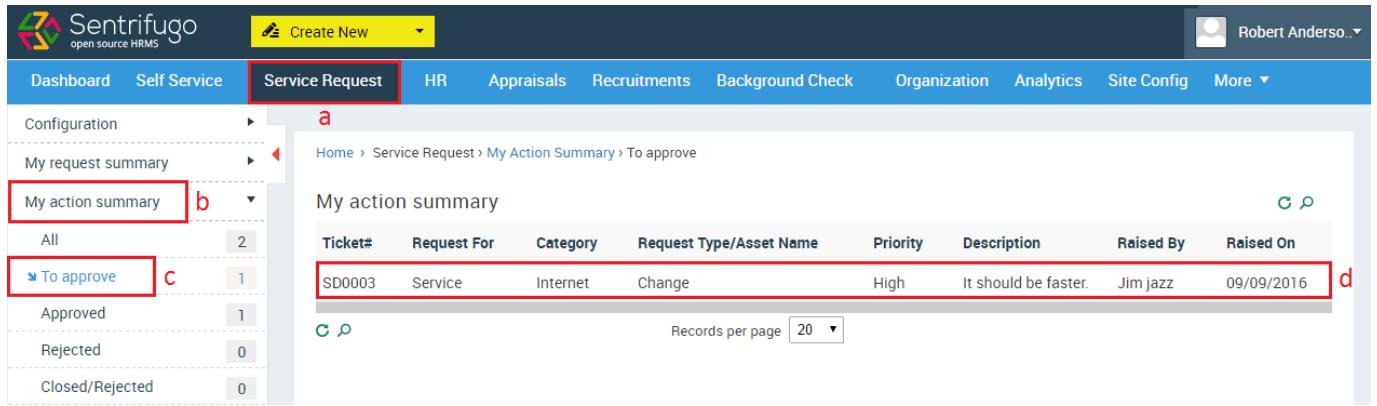
- e. Click **Close request** button to approve/reject the request.
  - e1. Select an action (Approve/Reject)
  - e2. Provide comments.
- f. Request **Management Approval** for the service request (They will be the approver(s) selected while configuring the Service Request Settings)
- g. Request **Manager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



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

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

Please refer Figure 85

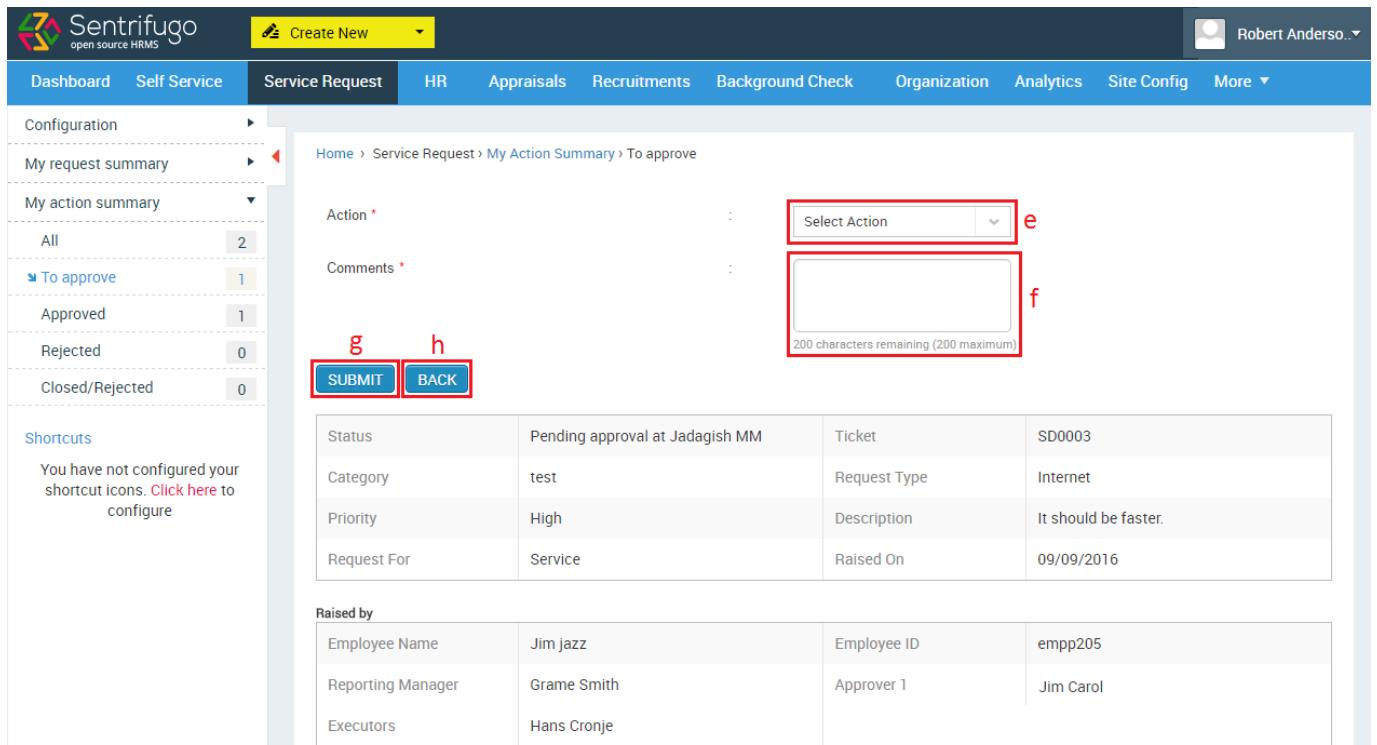


The screenshot shows the Sentrifugo Service Request module. The top navigation bar has a 'Create New' button and a user profile for 'Robert Anderso..'. Below the bar, the main menu includes 'Dashboard', 'Self Service', 'Service Request' (which is highlighted), 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. On the left, a sidebar has sections for 'Configuration', 'My request summary', and 'My action summary'. Under 'My action summary', there are links for 'All' (2), 'To approve' (1), 'Approved' (1), 'Rejected' (0), and 'Closed/Rejected' (0). The main content area shows a 'My action summary' table with one row. The table columns are 'Ticket#', 'Request For', 'Category', 'Request Type/Asset Name', 'Priority', 'Description', 'Raised By', and 'Raised On'. The row data is: SD0003, Service, Internet, Change, High, 'It should be faster.', Jim jazz, 09/09/2016.

Figure 85

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

Please refer Figure 86



The screenshot shows the 'My Action Summary' page with a ticket selected for approval. The 'Action' field has a dropdown menu labeled 'Select Action' (highlighted by a red box 'e'). The 'Comments' field is a text area with placeholder text '200 characters remaining (200 maximum)' (highlighted by a red box 'f'). Below the form are two buttons: 'SUBMIT' (highlighted by a red box 'g') and 'BACK' (highlighted by a red box 'h'). At the bottom, there are two tables. The first table shows ticket details: Status (Pending approval at Jadagish MM), Ticket (SD0003), Category (test), Request Type (Internet), Priority (High), Description (It should be faster.), and Request For (Service). The second table shows 'Raised by' information: Employee Name (Jim jazz), Employee ID (empp205), Reporting Manager (Grame Smith), Approver 1 (Jim Carol), Executors (Hans Cronje), and Raised On (09/09/2016).

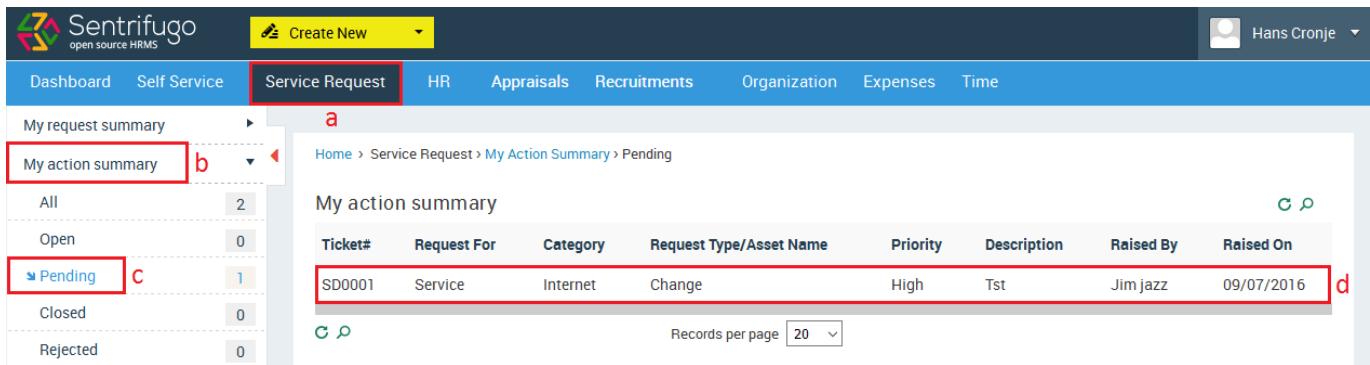
Figure 86

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

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

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

*Please refer Figure 87*



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

Figure 87

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

*Please refer Figure 88*

Sentrifugo open source HRMS

Create New ▾

Hans Cronje ▾

Dashboard Self Service Service Request HR Appraisals Recruitments Organization Expenses Time

My request summary ▾

My action summary ▾

All	2
Open	0
Pending	1
Closed	0
Rejected	0
Cancelled	0
Due today	0
Overdue	0
Sent for approval	1

Shortcuts




Action \* : Select Action e

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

**SUBMIT** g BACK

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

Raised by

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

Figure 88

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

## 6. HR

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

### 6.1 Adding Employees

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

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

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

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

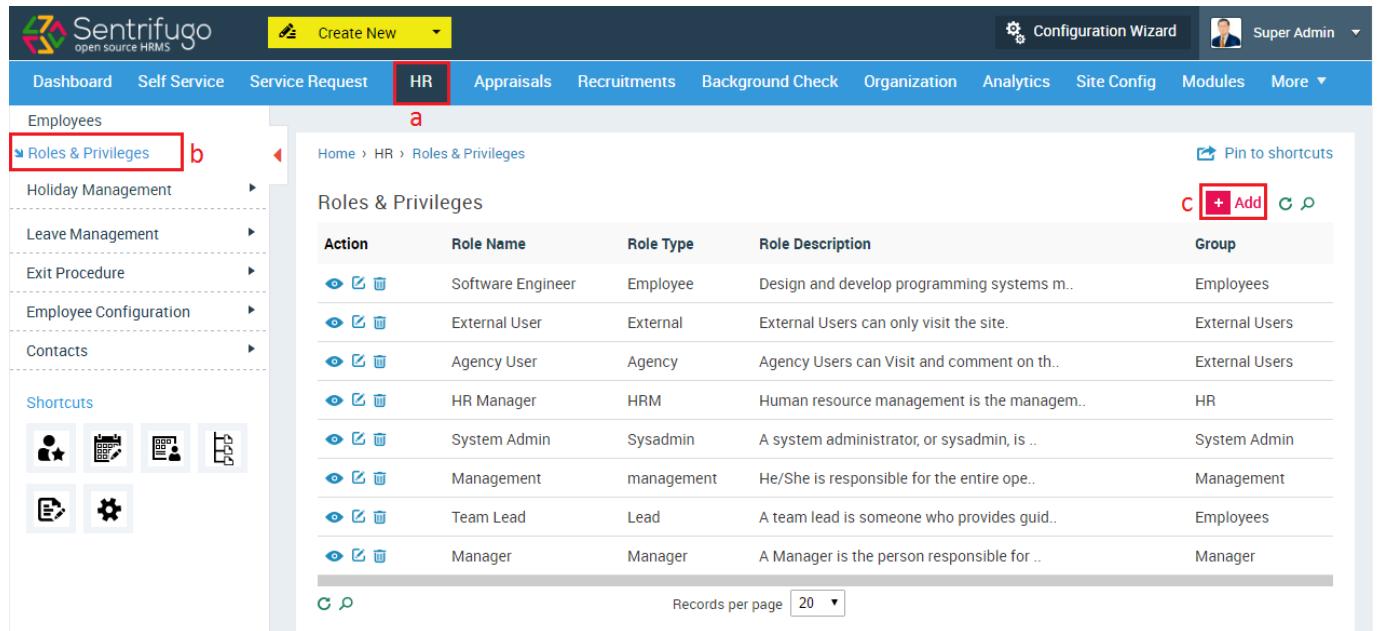
As mentioned earlier in section [1.1 What are the roles available in Sentrifugo?](#), there are 6 main role groups available by default in Sentrifugo:

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

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

**To create a new role:**

Please refer Figure 89

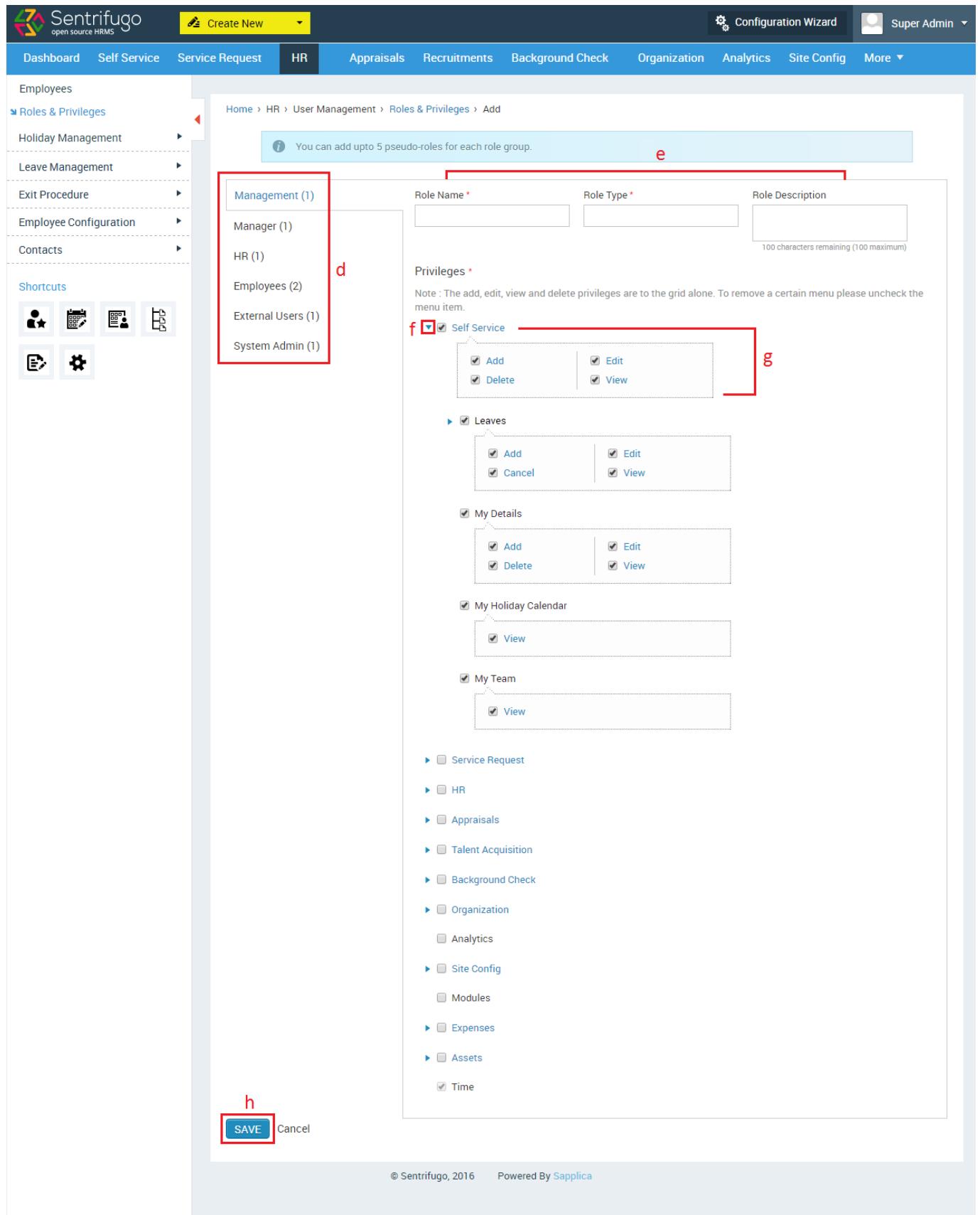


The screenshot shows the Sentrifugo HRM system interface. At the top, there's a navigation bar with links for Dashboard, Self Service, Service Request, HR (which is highlighted with a red box 'a'), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. Below the navigation bar is a left sidebar with sections for Employees (highlighted with a red box 'b') and Holiday Management, Leave Management, Exit Procedure, Employee Configuration, and Contacts. Under 'Employees', there's a 'Shortcuts' section with icons for user management, reports, and more. The main content area is titled 'Roles & Privileges' and lists various roles with columns for Action, Role Name, Role Type, Role Description, and Group. The 'Action' column contains icons for view, edit, and delete. The 'Role Name' column lists Software Engineer, External User, Agency User, HR Manager, System Admin, Management, Team Lead, and Manager. The 'Role Type' column includes Employee, External, Agency, HRM, Sysadmin, management, Lead, and Manager. The 'Role Description' column provides a brief description for each role. The 'Group' column lists Employees, External Users, External Users, External Users, HR, System Admin, Management, and Manager respectively. At the bottom of the main content area, there are buttons for 'Records per page' (set to 20) and 'Search'. In the top right corner of the main content area, there's a '+Add' button highlighted with a red box 'c'.

Figure 89

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

Please refer Figure 90



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

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

**Management (1)**

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

**Role Name \***

**Role Type \***

**Role Description**

100 characters remaining (100 maximum)

**Privileges \***

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

**Self Service**

<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit
<input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> View

**Leaves**

<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit
<input checked="" type="checkbox"/> Cancel	<input checked="" type="checkbox"/> View

**My Details**

<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit
<input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> View

**My Holiday Calendar**

<input checked="" type="checkbox"/> View
--

**My Team**

<input checked="" type="checkbox"/> View
--

**Service Request**

**HR**

**Appraisals**

**Talent Acquisition**

**Background Check**

**Organization**

**Analytics**

**Site Config**

**Modules**

**Expenses**

**Assets**

**Time**

**SAVE**

Figure 90

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

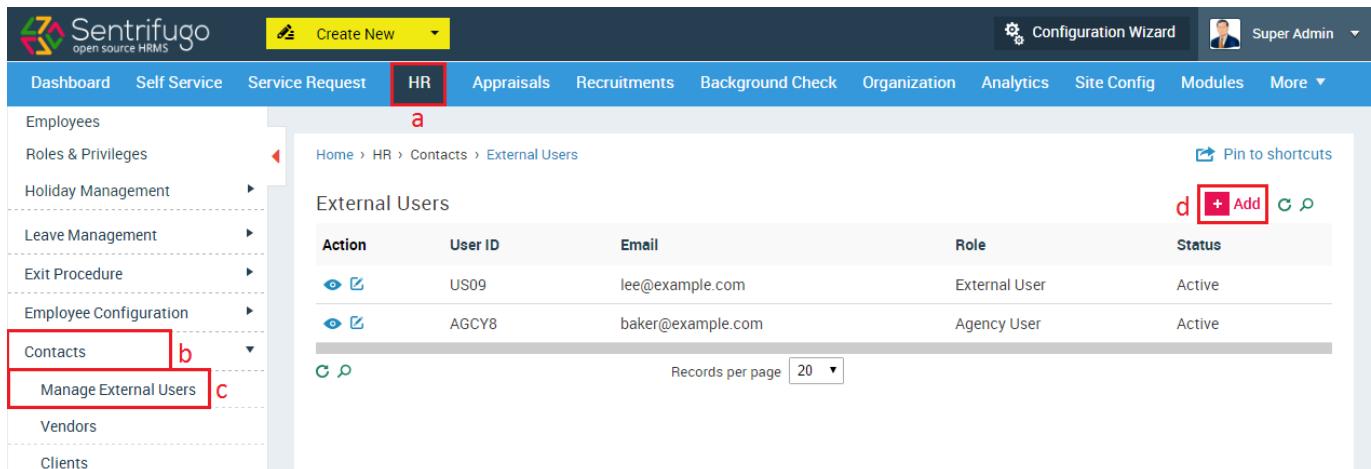
## 6.3 How do I add External Users?

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

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

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

Please refer Figure 91



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

Figure 91

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

Please refer Figure 92

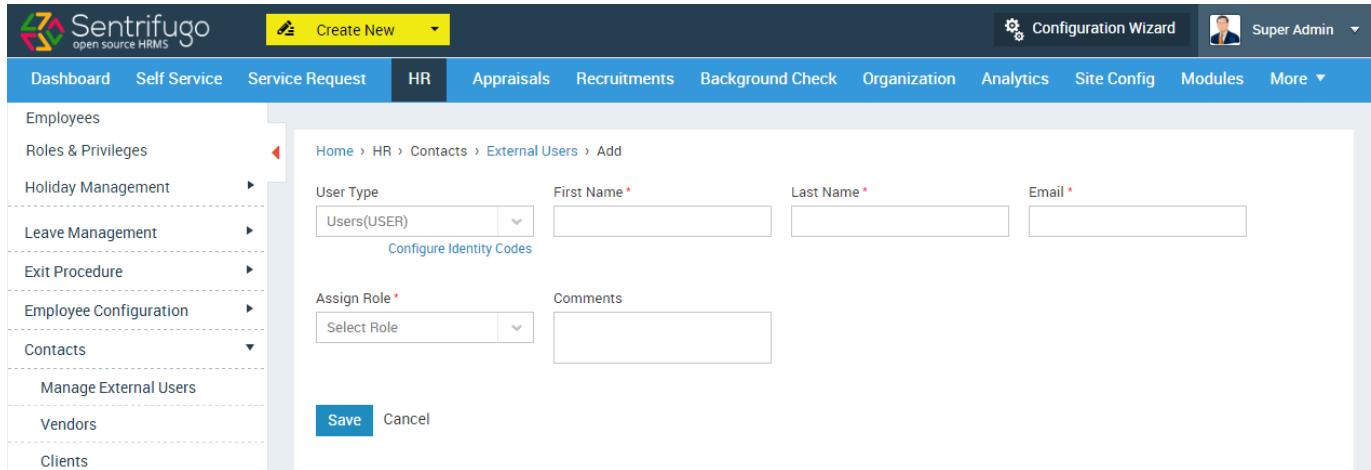


Figure 92

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



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

## 6.4 Holiday Management

Please refer section [3.11 - 3.13](#)

## 6.5 Leave Management

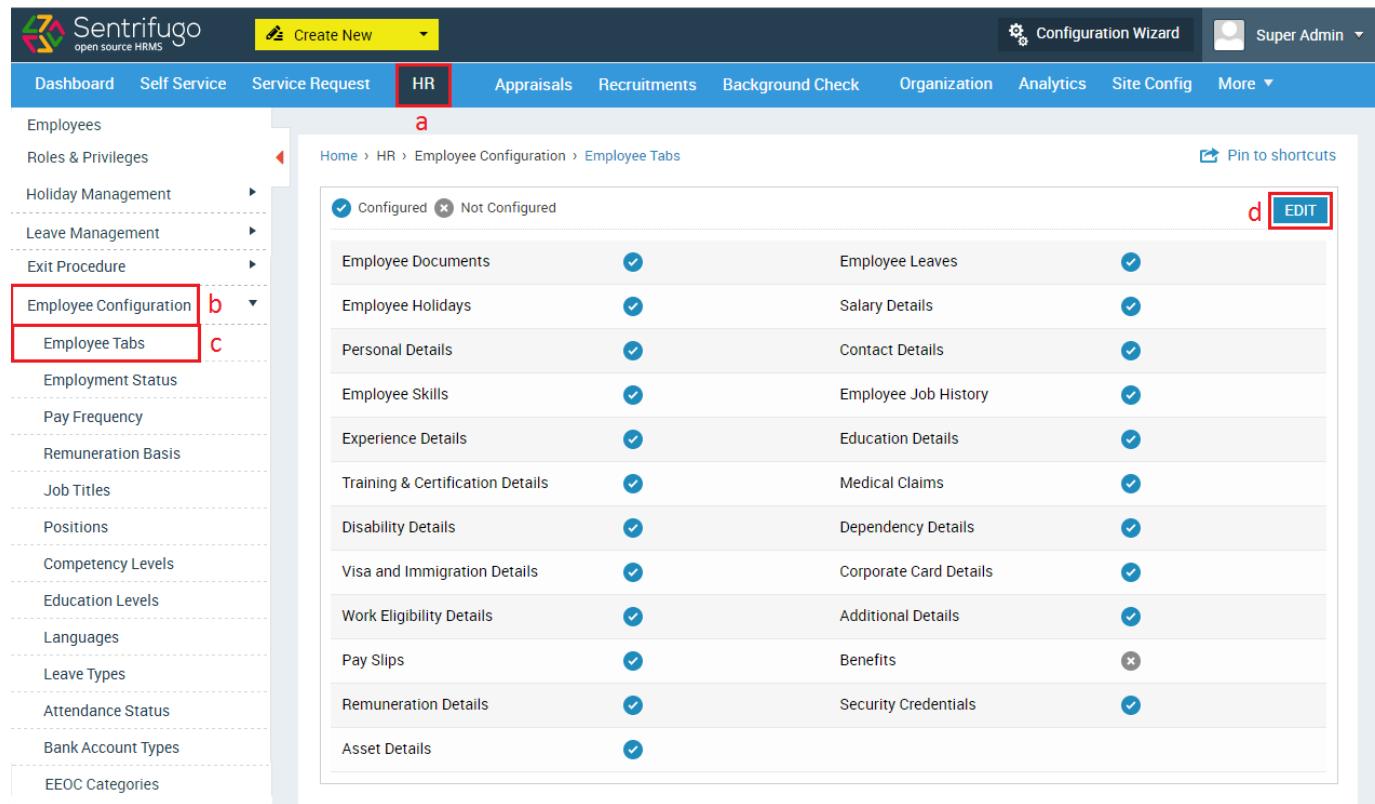
Please refer section [3. Leave Management](#)

## 6.6 Employee Configuration

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

### 6.6.1 How do I select Employee Tabs?

Please refer Figure 93



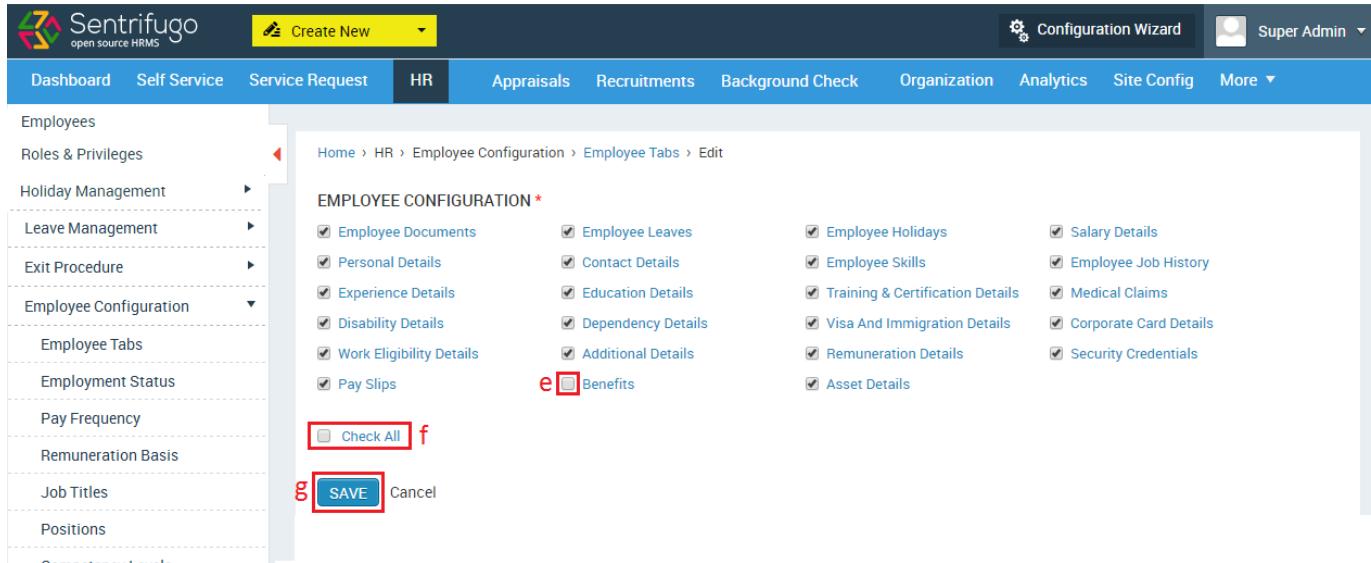
The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes the logo, a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. The main menu has tabs for Dashboard, Self Service, Service Request, HR (which is highlighted with a red box 'a'), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists various configuration categories like Employees, Roles & Privileges, Holiday Management, etc., with 'Employee Configuration' and 'Employee Tabs' highlighted by red boxes 'b' and 'c' respectively. The central content area shows the 'Employee Configuration > Employee Tabs' page. It features a header with 'Configured' (checked) and 'Not Configured' (unchecked) options, a breadcrumb trail (Home > HR > Employee Configuration > Employee Tabs), and a 'Pin to shortcuts' link. Below is a table of tabs with checkboxes. A red box 'd' highlights the 'EDIT' button in the top right of the table header.

Employee Documents	<input checked="" type="checkbox"/>	Employee Leaves	<input checked="" type="checkbox"/>
Employee Holidays	<input checked="" type="checkbox"/>	Salary Details	<input checked="" type="checkbox"/>
Personal Details	<input checked="" type="checkbox"/>	Contact Details	<input checked="" type="checkbox"/>
Employee Skills	<input checked="" type="checkbox"/>	Employee Job History	<input checked="" type="checkbox"/>
Experience Details	<input checked="" type="checkbox"/>	Education Details	<input checked="" type="checkbox"/>
Training & Certification Details	<input checked="" type="checkbox"/>	Medical Claims	<input checked="" type="checkbox"/>
Disability Details	<input checked="" type="checkbox"/>	Dependency Details	<input checked="" type="checkbox"/>
Visa and Immigration Details	<input checked="" type="checkbox"/>	Corporate Card Details	<input checked="" type="checkbox"/>
Work Eligibility Details	<input checked="" type="checkbox"/>	Additional Details	<input checked="" type="checkbox"/>
Pay Slips	<input checked="" type="checkbox"/>	Benefits	<input type="checkbox"/>
Remuneration Details	<input checked="" type="checkbox"/>	Security Credentials	<input checked="" type="checkbox"/>
Asset Details	<input checked="" type="checkbox"/>		

Figure 93

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

Please refer Figure 94



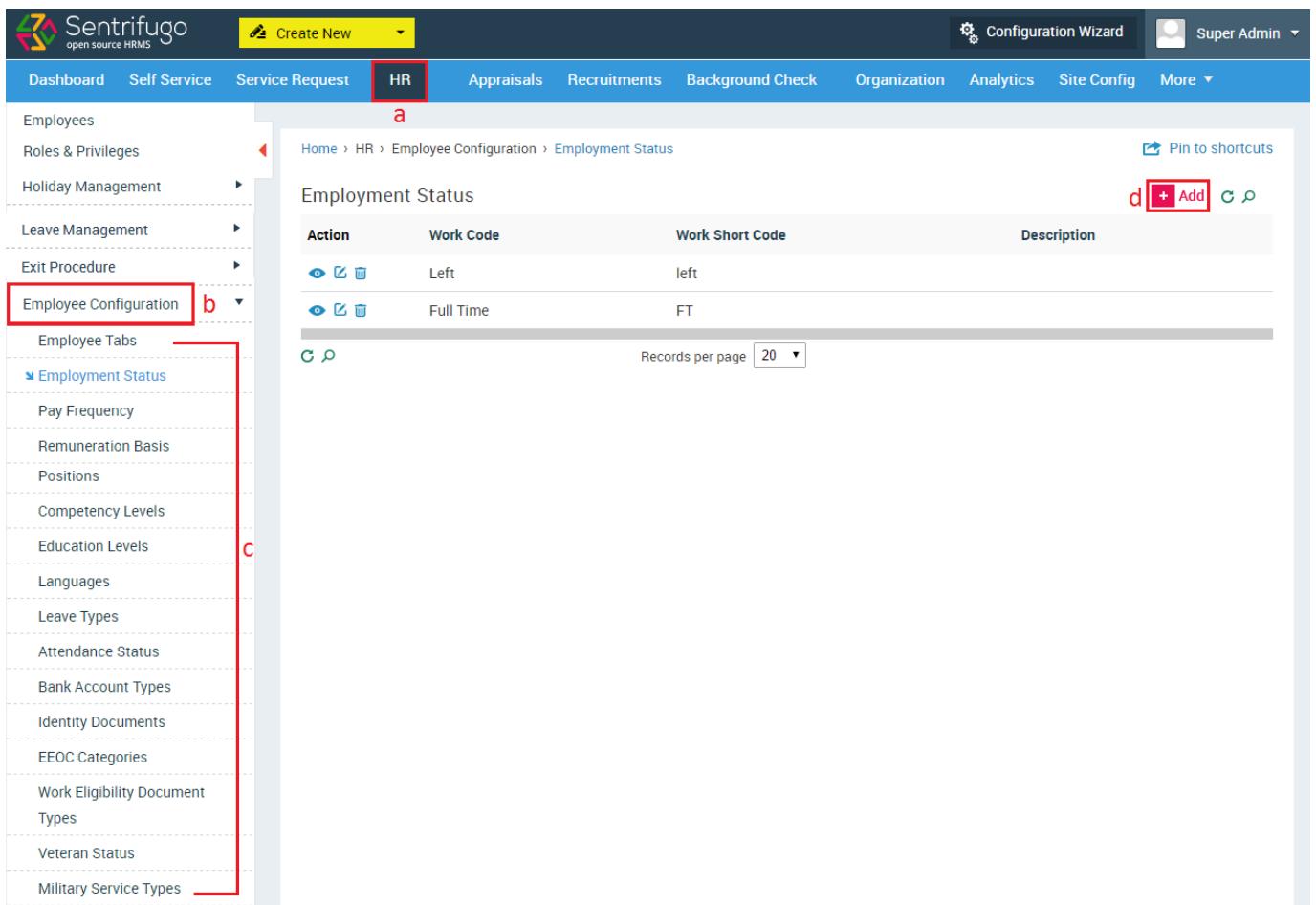
The screenshot shows the Sentrifugo open source HRMS interface. The top navigation bar includes the logo, a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. The main menu has tabs for Dashboard, Self Service, Service Request, HR (which is active), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists various HR management sections. The 'Employee Configuration' section is expanded, showing options like Leave Management, Exit Procedure, and Employee Tabs. The 'Employee Tabs' section is currently selected. The main content area displays the 'EMPLOYEE CONFIGURATION \*' page with a grid of checkboxes for different employee details. A red box highlights the 'Check All' checkbox under the 'Benefits' section. Another red box highlights the 'SAVE' button at the bottom. The status bar at the bottom of the browser window shows 'Page 89 of 236'.

Figure 94

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

### 6.6.2 How do I set Employee Configuration?

Please refer Figure 95

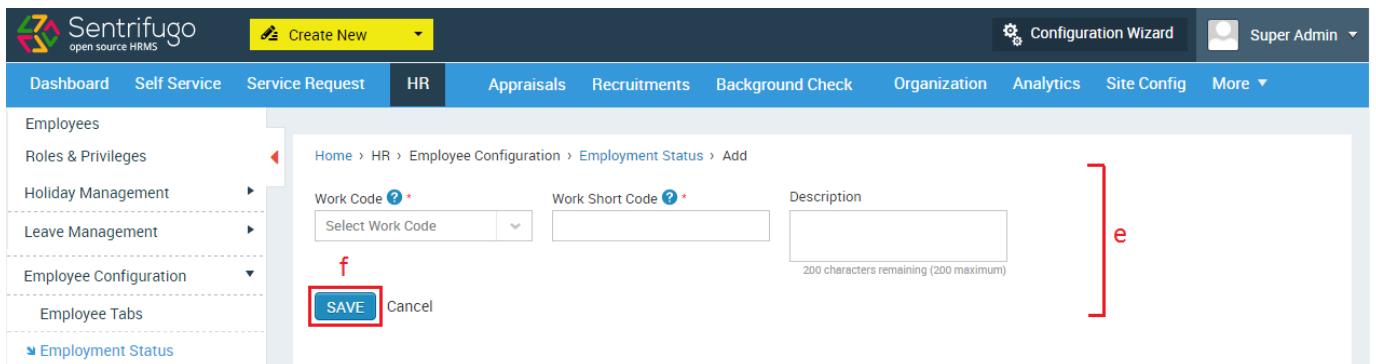


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Configuration Wizard', 'Super Admin', and links for Dashboard, Self Service, Service Request, HR (highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The left sidebar has a tree view with 'Employee Configuration' expanded, showing sub-options like Employee Tabs, Employment Status (highlighted with a red box), Pay Frequency, Remuneration Basis, Positions, Competency Levels, Education Levels, Languages, Leave Types, Attendance Status, Bank Account Types, Identity Documents, EEOC Categories, Work Eligibility Document Types, Veteran Status, and Military Service Types. The main content area displays the 'Employment Status' configuration page with a table showing two rows: 'Left' (Work Code) and 'FT' (Work Short Code). A red box labeled 'd' highlights the '+Add' button. The bottom right of the content area has a 'Records per page' dropdown set to 20.

Figure 95

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

Please refer Figure 96



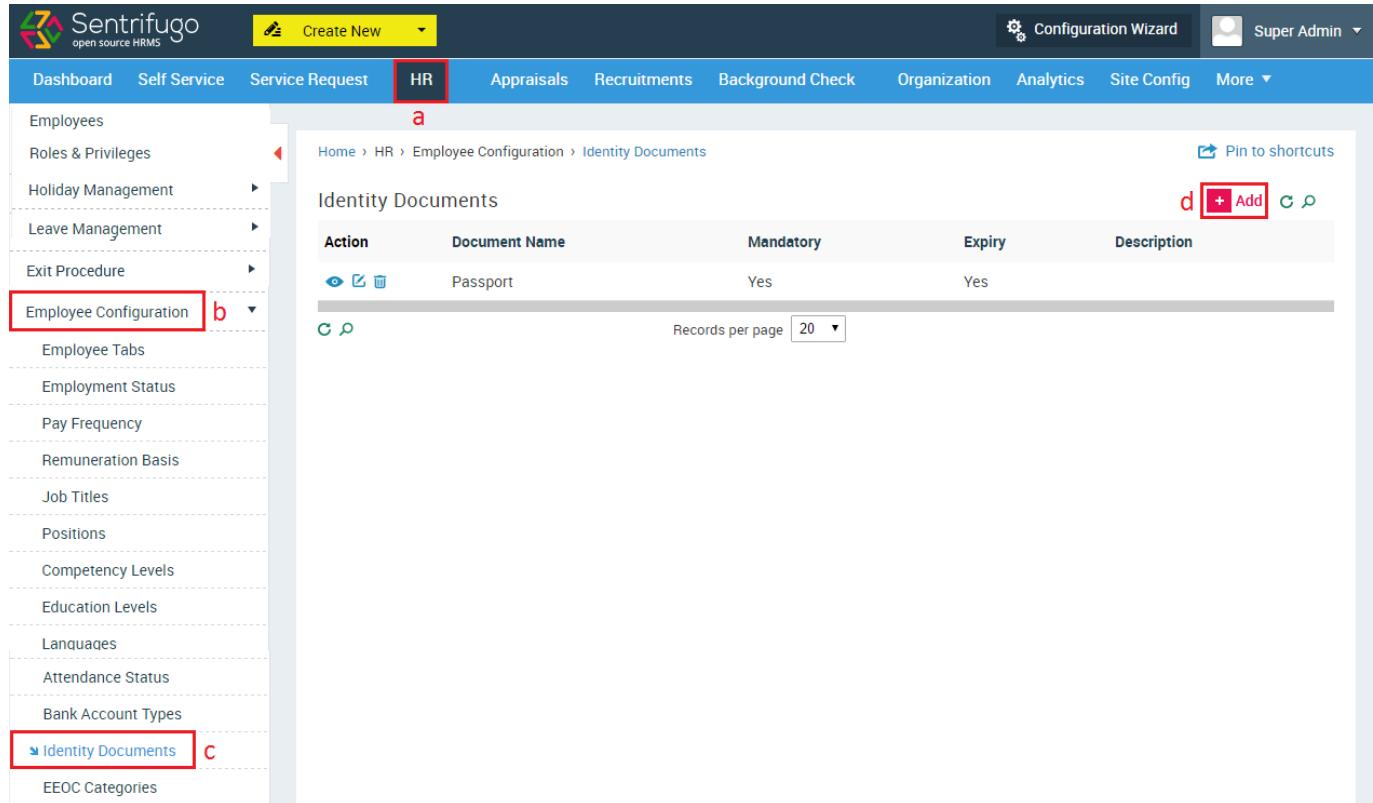
The screenshot shows the 'Employment Status' add form. The top navigation bar and sidebar are identical to Figure 95. The main content area shows a form with fields for 'Work Code' (with a question mark icon and a dropdown placeholder 'Select Work Code'), 'Work Short Code' (with a question mark icon and an input field containing 'left'), and 'Description' (with a text area placeholder '200 characters remaining (200 maximum)'). A red box labeled 'e' points to the 'Description' field. A red box labeled 'f' points to the 'SAVE' button at the bottom left of the form.

Figure 96

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

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

Please refer Figure 97



The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has 'HR' highlighted. The left sidebar shows 'Employee Configuration' expanded, with 'Identity Documents' selected. The right panel displays a table of identity documents, showing one entry: 'Passport' is mandatory and has an expiry date. Buttons for '+Add' and search are visible.

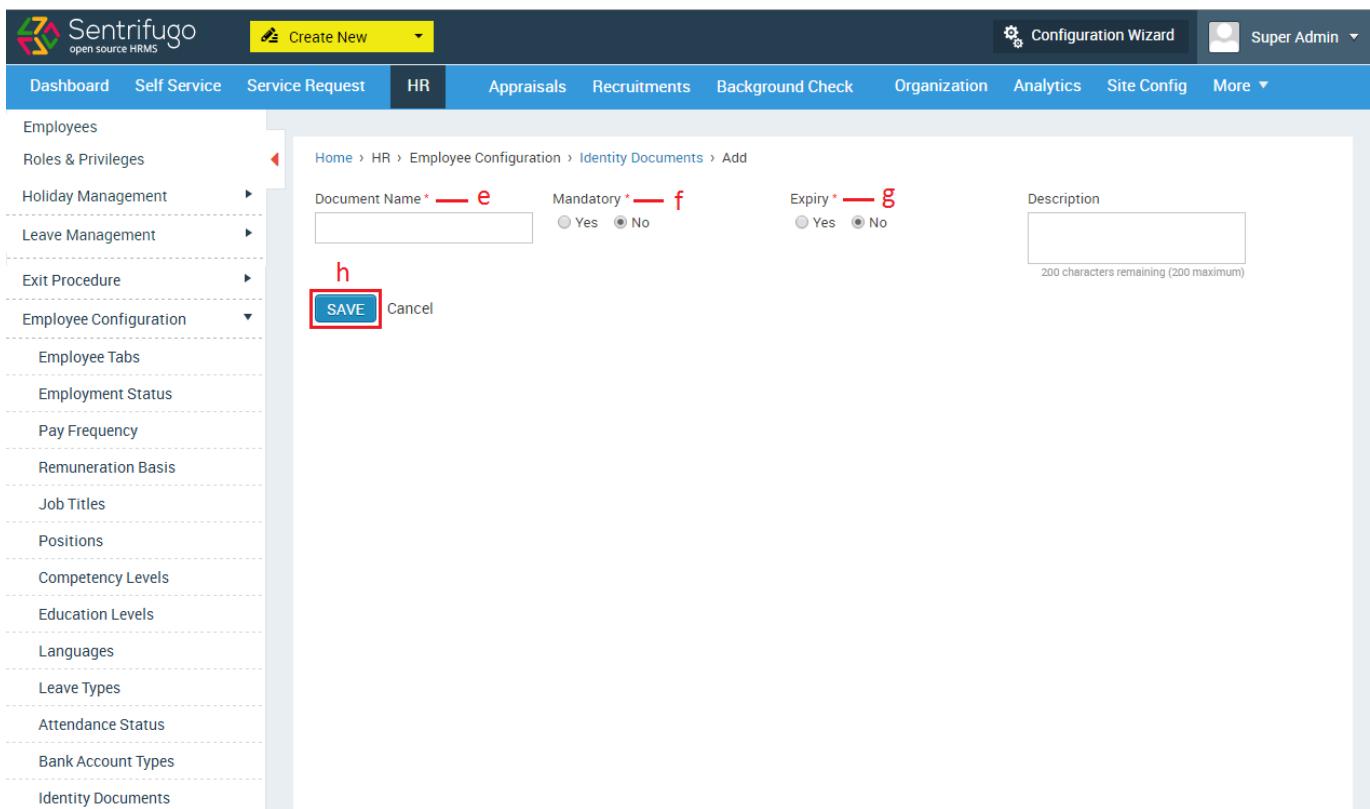
Action	Document Name	Mandatory	Expiry	Description
	Passport	Yes	Yes	

Records per page: 20

Figure 97

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

Please refer Figure 98



The screenshot shows the Sentrifugo HRMS application interface. At the top, there's a navigation bar with links for Dashboard, Self Service, Service Request, HR (which is selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, More, Configuration Wizard, and Super Admin. On the left, a sidebar lists various HR modules like Employees, Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration, Employee Tabs, Employment Status, Pay Frequency, Remuneration Basis, Job Titles, Positions, Competency Levels, Education Levels, Languages, Leave Types, Attendance Status, Bank Account Types, and Identity Documents. The main content area shows a 'Home > HR > Employee Configuration > Identity Documents > Add' path. It has fields for 'Document Name' (labeled e), 'Mandatory' (labeled f) with radio buttons for Yes (gray) and No (selected), 'Expiry' (labeled g) with radio buttons for Yes (gray) and No (selected), and a 'Description' text area with a character limit of 200. A red box highlights the 'SAVE' button (labeled h). Below the form, there's a 'Cancel' link.

Figure 98

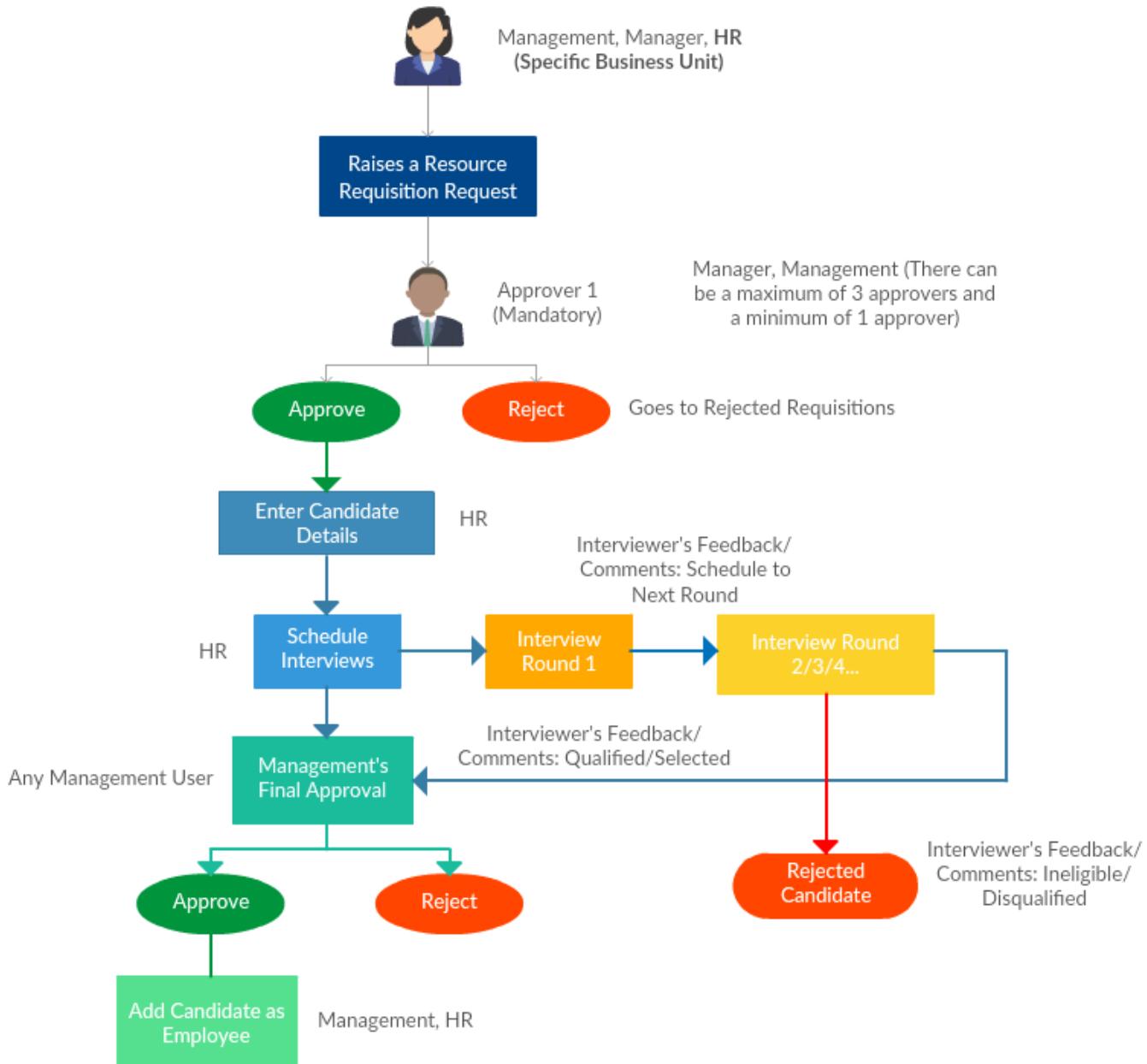
- e. Enter document name
- f. Select if you require a document to be mandatory or not
- g. Select if documents needs to have an expiry date
- h. Click **SAVE** button



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

## 7. Recruitments

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

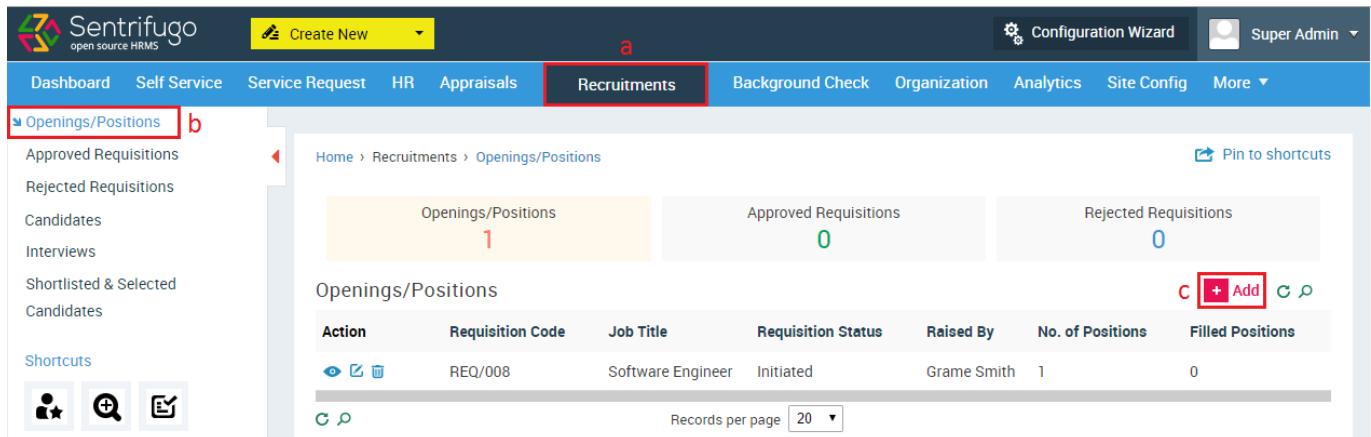


**Description:**

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

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

Please refer Figure 99

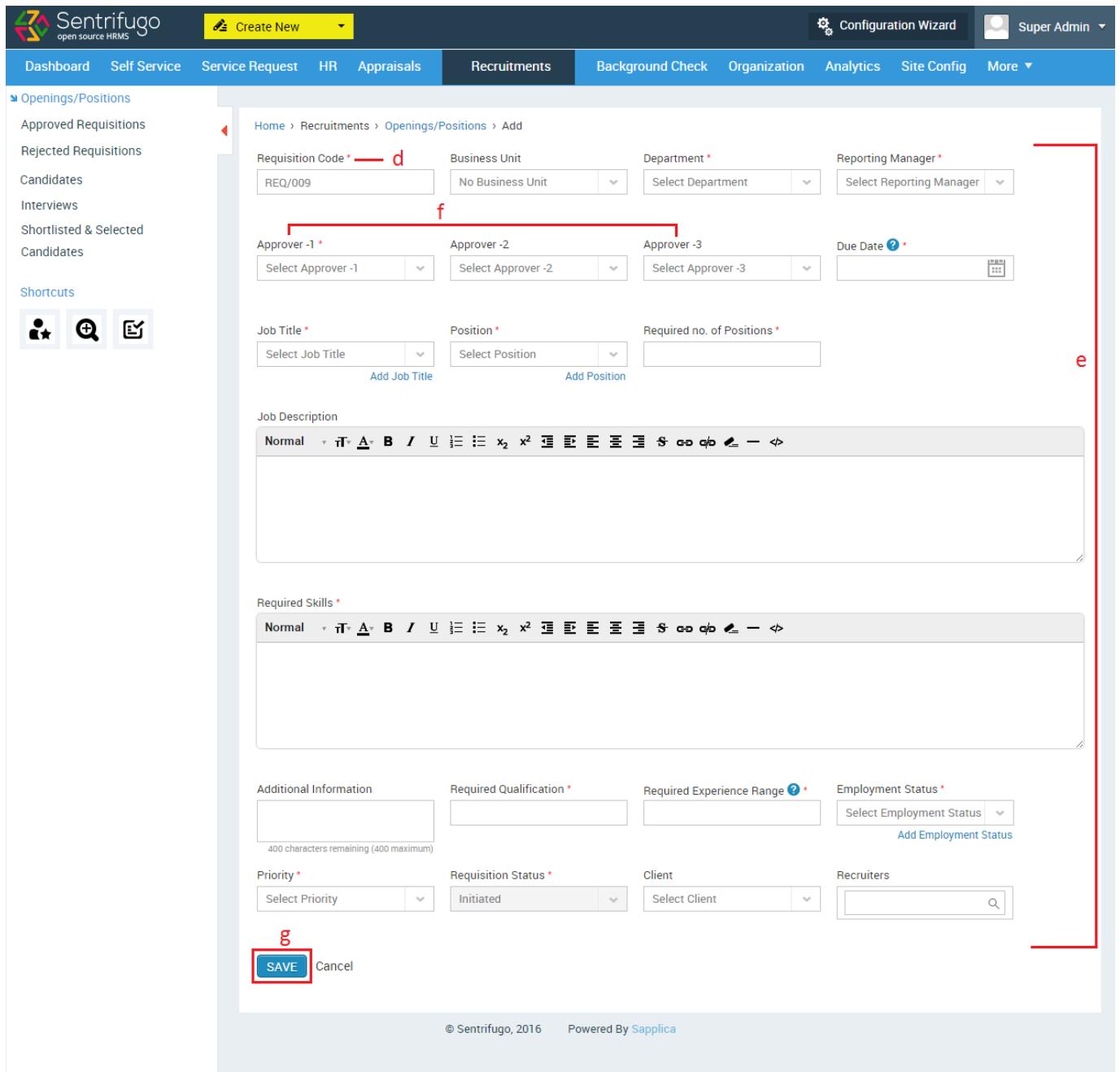


Action	Requisition Code	Job Title	Requisition Status	Raised By	No. of Positions	Filled Positions
	REQ/008	Software Engineer	Initiated	Grame Smith	1	0

Figure 99

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

Please refer Figure 100



The screenshot shows the Sentrifugo open source HRMS application interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (selected), Background Check, Organization, Analytics, Site Config, and More. On the far right, there are Configuration Wizard and Super Admin dropdown menus.

The main content area displays the 'Openings/Positions' add form. The form fields include:

- Requisition Code: REQ/009 (marked with a red box 'd')
- Business Unit: No Business Unit
- Department: Select Department
- Reporting Manager: Select Reporting Manager
- Approver -1, Approver -2, Approver -3: Select Approver dropdowns (marked with a red box 'f')
- Due Date: Date input field
- Job Title: Select Job Title dropdown
- Position: Select Position dropdown
- Required no. of Positions: Text input field
- Job Description: Rich text editor with toolbar (marked with a red box 'e')
- Required Skills: Rich text editor with toolbar
- Additional Information: Text area with character count (400 characters remaining, 400 maximum)
- Required Qualification: Text area
- Required Experience Range: Text area
- Employment Status: Select Employment Status dropdown
- Add Employment Status: Link
- Priority: Select Priority dropdown
- Requisition Status: Initiated
- Client: Select Client dropdown
- Recruiters: Text input field with search icon

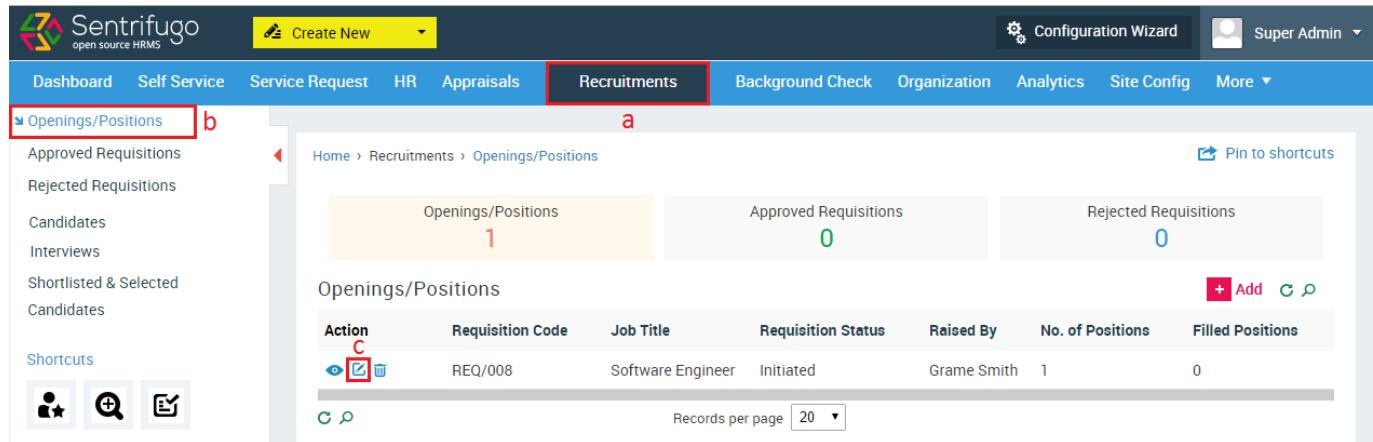
At the bottom left is a blue 'SAVE' button (marked with a red box 'g') and a 'Cancel' link. The footer of the page includes copyright information: © Sentrifugo, 2016 and Powered By Sapplica.

Figure 100

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

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

Please refer Figure 101

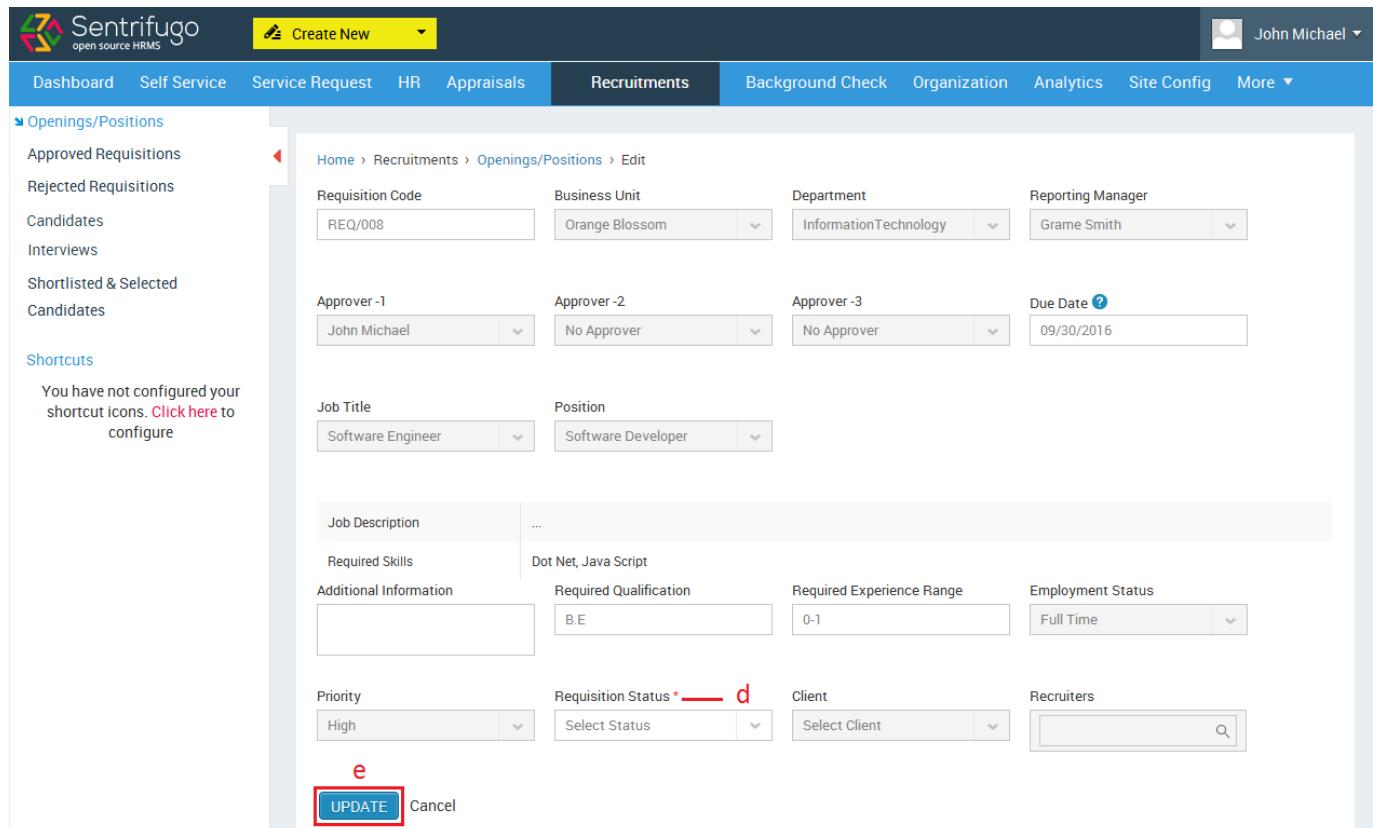


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Create New, Configuration Wizard, Super Admin, Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (which is highlighted with a red box), Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists Openings/Positions, Approved Requisitions, Rejected Requisitions, Candidates, Interviews, Shortlisted & Selected Candidates, and Shortcuts. The main content area displays a summary of Openings/Positions (1), Approved Requisitions (0), and Rejected Requisitions (0). Below this is a table titled 'Openings/Positions' with columns for Action, Requisition Code, Job Title, Requisition Status, Raised By, No. of Positions, and Filled Positions. A single row is shown for a requisition with code REQ/008, job title Software Engineer, status Initiated, raised by Grame Smith, 1 position, and 0 filled. Action icons include edit (highlighted with a red box), view, and delete.

Figure 101

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

Please refer Figure 102



The screenshot shows the 'Edit' screen for a requisition. The top navigation bar and sidebar are identical to Figure 101. The main content area shows a detailed form for a requisition with code REQ/008, business unit Orange Blossom, department InformationTechnology, and reporting manager Grame Smith. It includes fields for Approver-1 (John Michael), Approver-2 (No Approver), Approver-3 (No Approver), and Due Date (09/30/2016). Below this are sections for Job Title (Software Engineer) and Position (Software Developer). Further down are fields for Job Description (ellipsis), Required Skills (Dot Net, Java Script), Additional Information (B.E.), Required Qualification (B.E.), Required Experience Range (0-1), Employment Status (Full Time), Priority (High), Requisition Status (highlighted with a red box), Client (Select Client), and Recruiters (Search field). At the bottom are 'UPDATE' and 'Cancel' buttons, with 'UPDATE' highlighted with a red box.

Figure 102

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

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

*Please refer Figure 103*

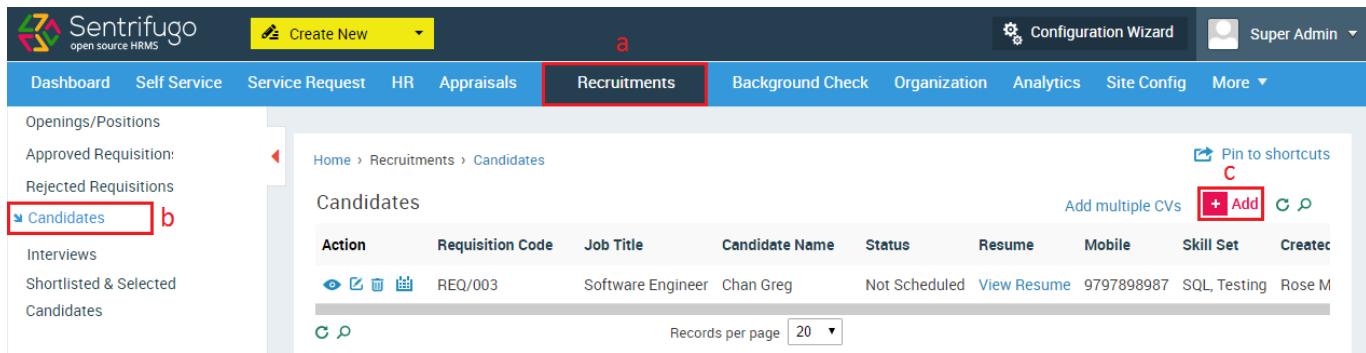
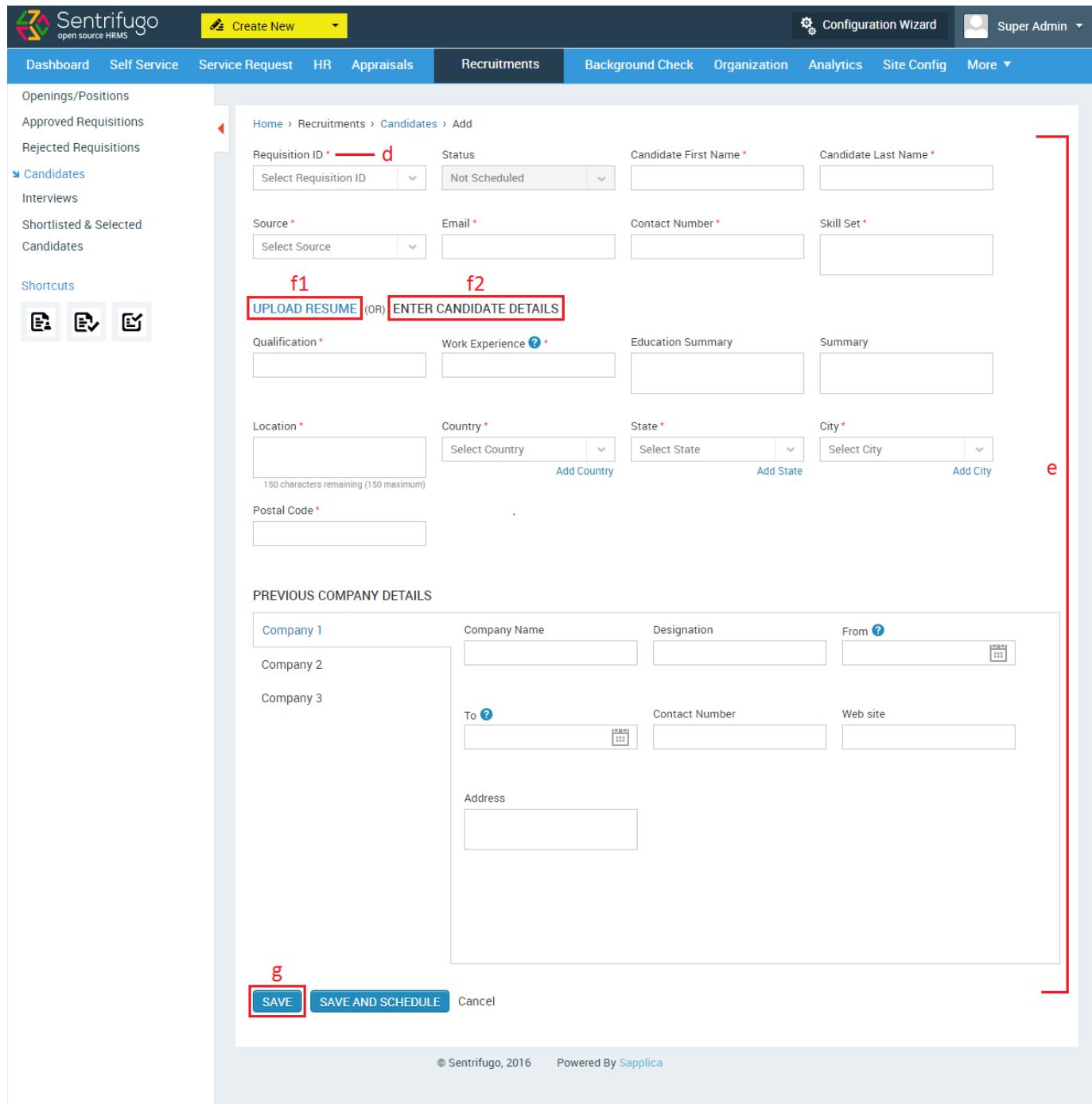


Figure 103

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

Please refer Figure 104



The screenshot shows the 'Recruitments' module in the Sentrifugo HRMS system. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (selected), Background Check, Organization, Analytics, Site Config, and More. On the left sidebar, there are links for Openings/Positions, Approved Requisitions, Rejected Requisitions, Candidates (selected), Interviews, Shortlisted & Selected Candidates, and Shortcuts. The main content area displays a form for adding a candidate. Key fields include Requisition ID (d), Status (Not Scheduled), Candidate First Name and Last Name, Source, Email, Contact Number, Skill Set, Qualification, Work Experience, Education Summary, Summary, Location, Country, State, City, Postal Code, and Previous Company Details. Buttons for 'UPLOAD RESUME' (f1) and 'ENTER CANDIDATE DETAILS' (f2) are highlighted with a red box. The 'SAVE' button (g) is also highlighted with a red box. A red box labeled 'e' covers the 'Previous Company Details' section.

Figure 104

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

Or

- f2. Click here to enter candidate details in a form

- g. Click **SAVE** button

## 7.4 How do I Schedule an Interview?

Please refer Figure 105

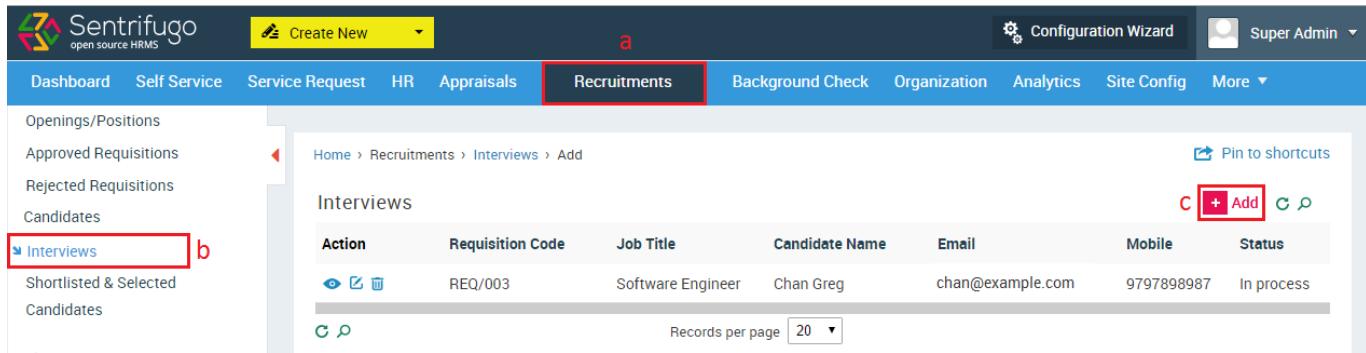


Figure 105

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

Please refer Figure 106

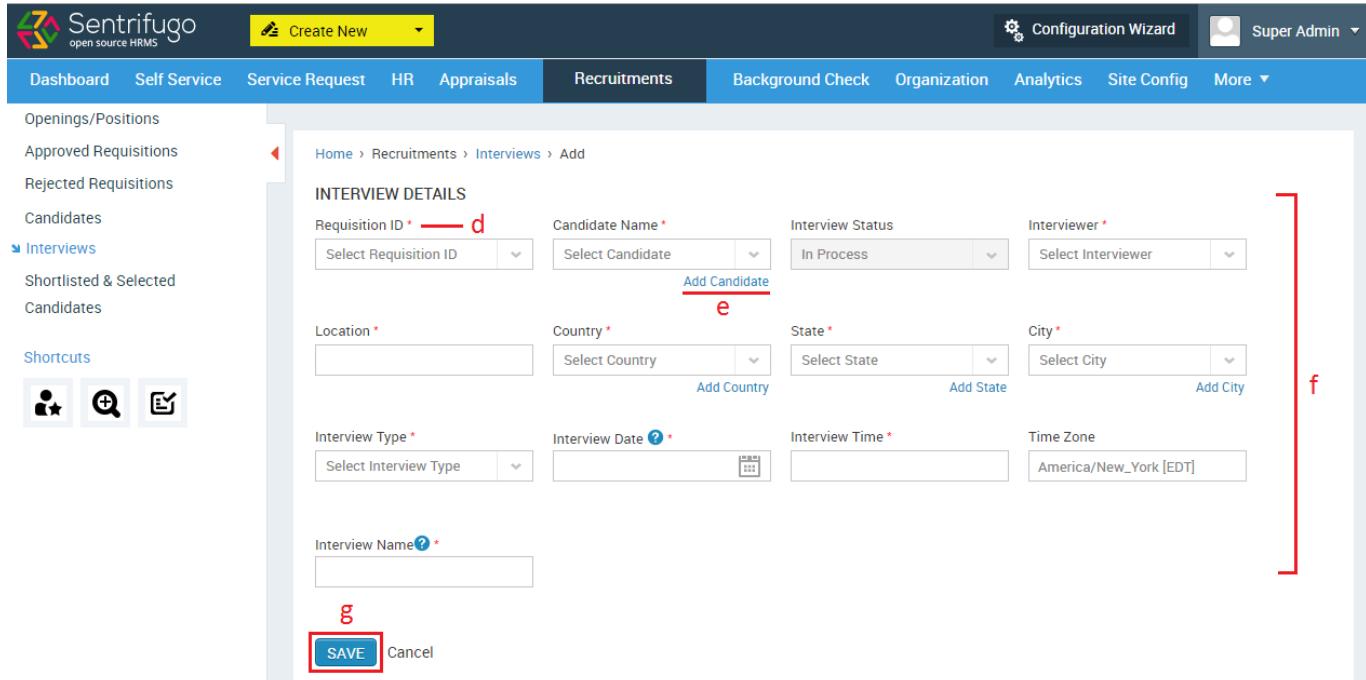


Figure 106

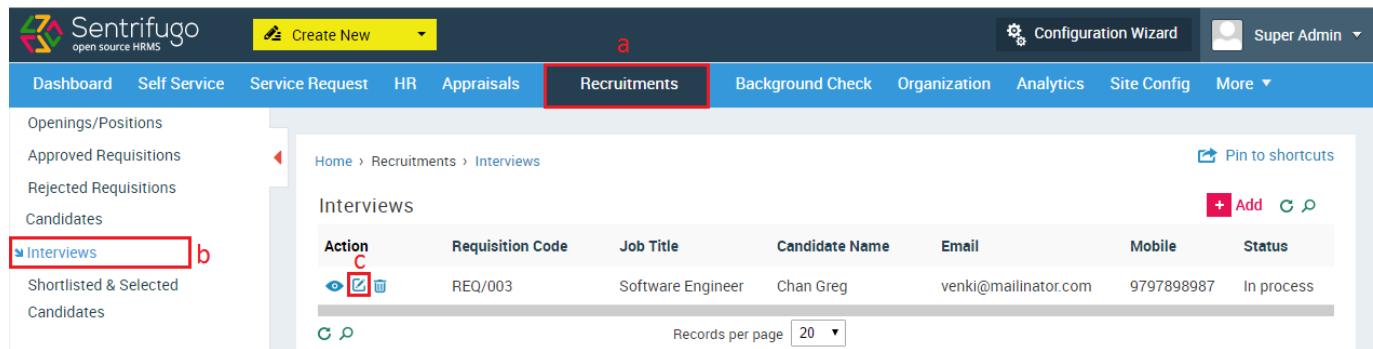
- Select the Requisition ID
- Add candidate details if they aren't added

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

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

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

Please refer Figure 107

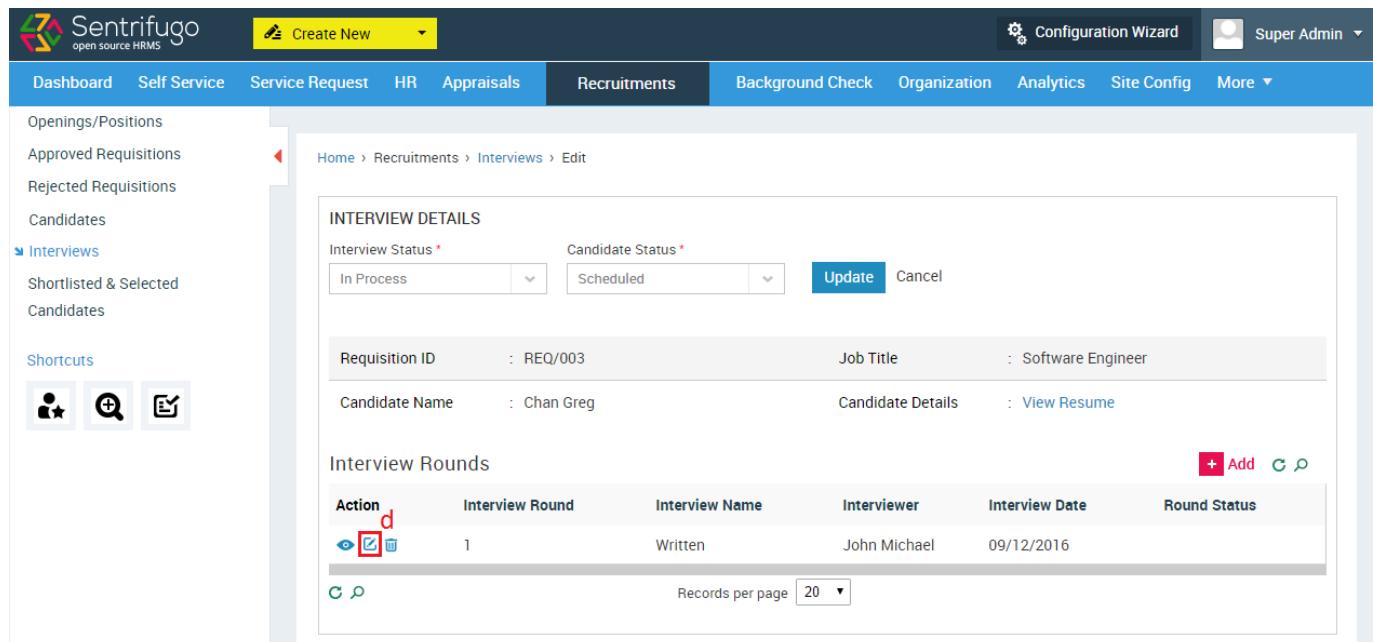


Action	Requisition Code	Job Title	Candidate Name	Email	Mobile	Status
	REQ/003	Software Engineer	Chan Greg	venki@mailinator.com	9797898987	In process

Figure 107

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

Please refer Figure 108



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

Figure 108

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

Please refer Figure 109

### Interview Rounds

Interviewer \*
Location \*
Country \*

Interviewer \*

Location \*

Country \*

State \*
City \*
Interview Type \*

Interview Date 
Interview Time \*
Time Zone

Select Date

Interview Name 
Interviewer Feedback
Interviewer Comments

Result Status \*
Select Status

e
f
UPDATE
Cancel

Figure 109

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

Please refer Figure 110

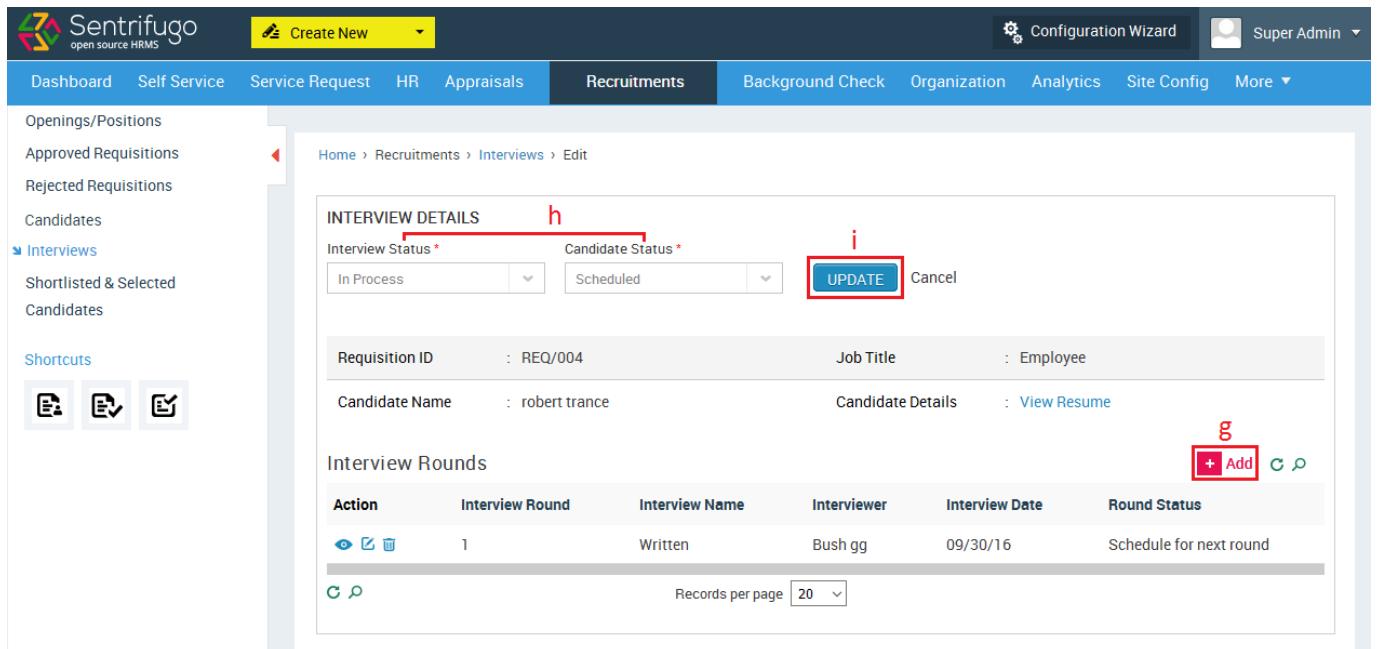


Figure 110

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

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

Please refer Figure 111

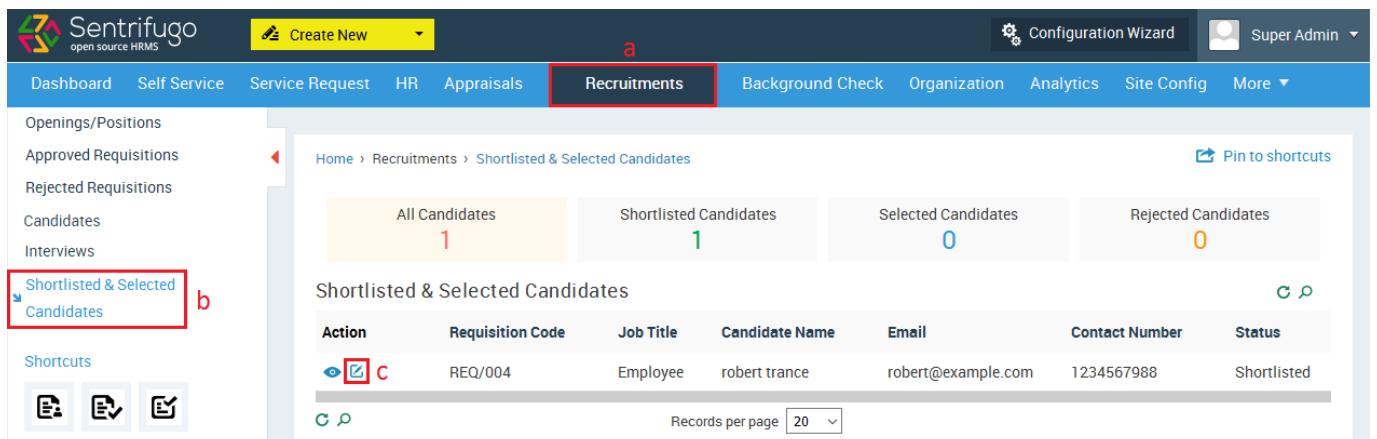
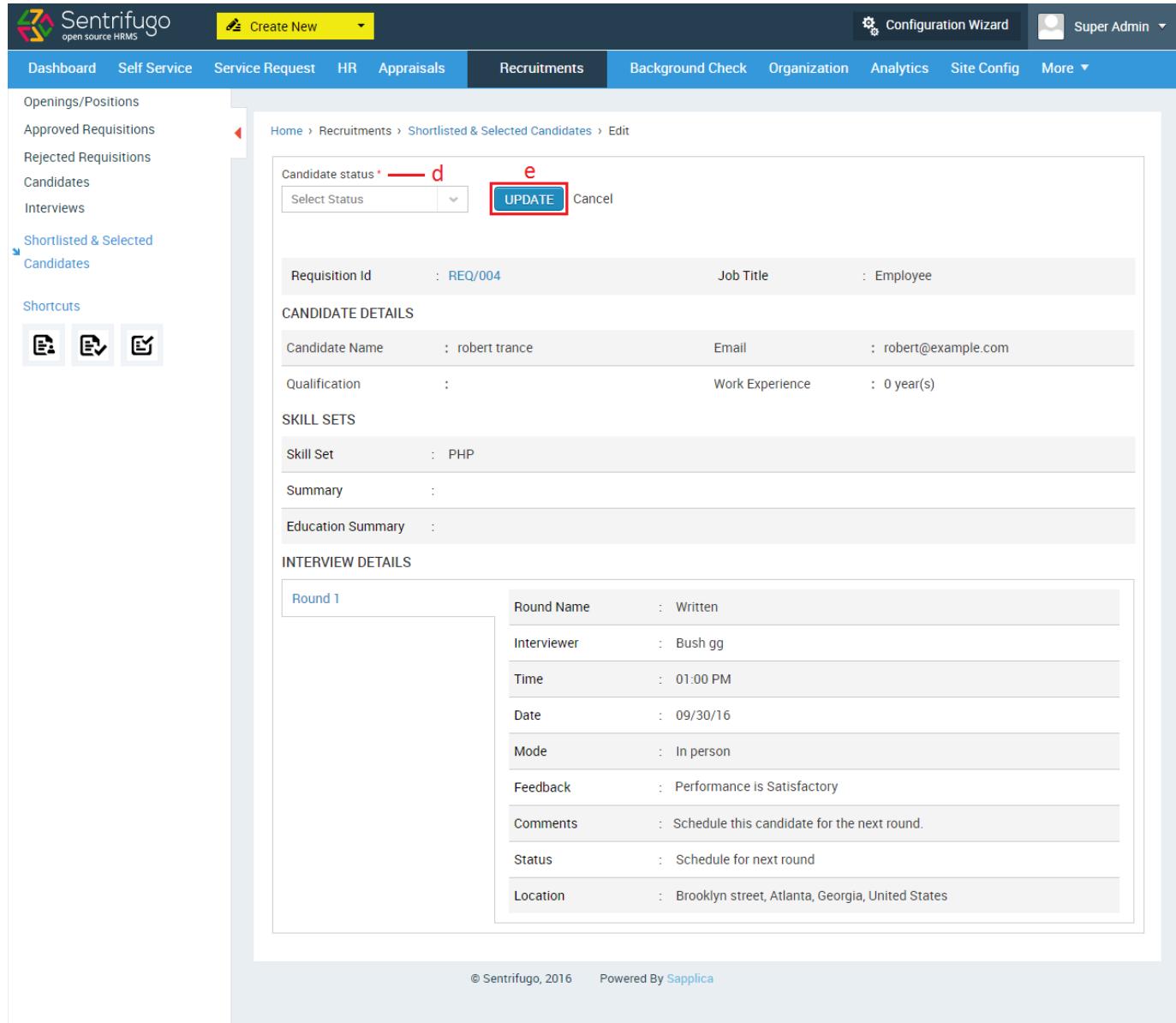


Figure 111

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

Please refer Figure 112



The screenshot shows the Sentrifugo HRMS application interface. The top navigation bar includes links for Create New, Configuration Wizard, Super Admin, and various system modules like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists Openings/Positions, Approved Requisitions, Rejected Requisitions, Candidates, Interviews, and Shortlisted & Selected Candidates, with the latter being the active tab. The main content area displays a form for editing a candidate. At the top of the form, there is a 'Candidate status' dropdown with a red box around it and the label 'd' above it. Below the dropdown is a blue 'UPDATE' button with a red box around it and the label 'e' above it. The form fields include Requisition Id (REQ/004), Job Title (Employee), Candidate Name (robert trance), Email (robert@example.com), Qualification, Work Experience (0 year(s)), Skill Set (PHP), Summary, Education Summary, Interview Details for Round 1 (Round Name: Written, Interviewer: Bush gg, Time: 01:00 PM, Date: 09/30/16, Mode: In person, Feedback: Performance is Satisfactory, Comments: Schedule this candidate for the next round, Status: Schedule for next round, Location: Brooklyn street, Atlanta, Georgia, United States). The bottom of the page includes copyright information: © Sentrifugo, 2016 and Powered By Sapplica.

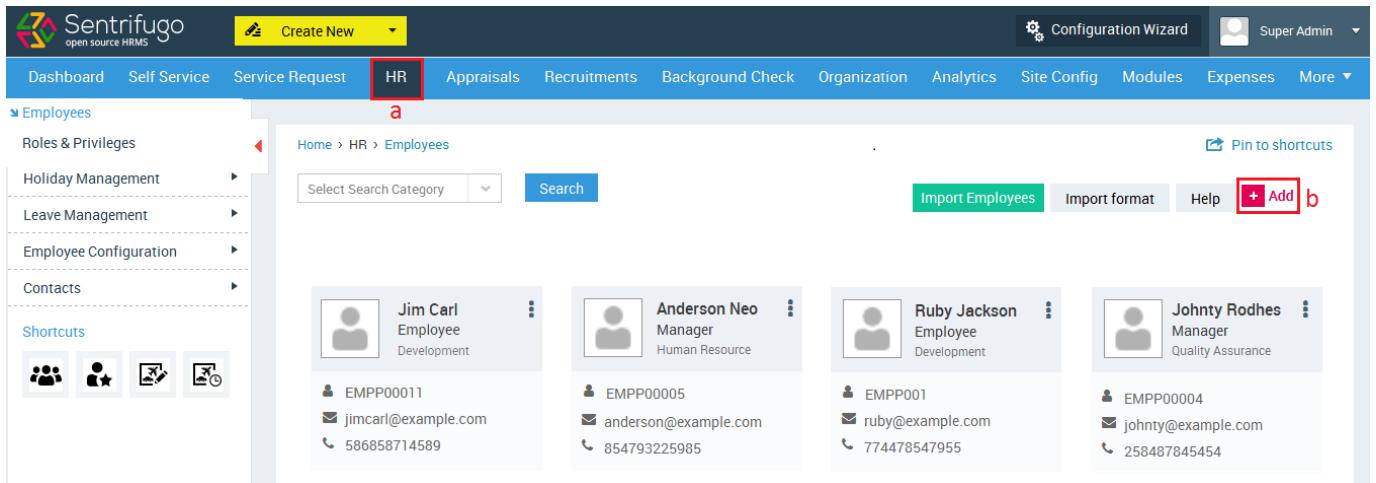
Figure 112

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

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

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

Please refer Figure 113



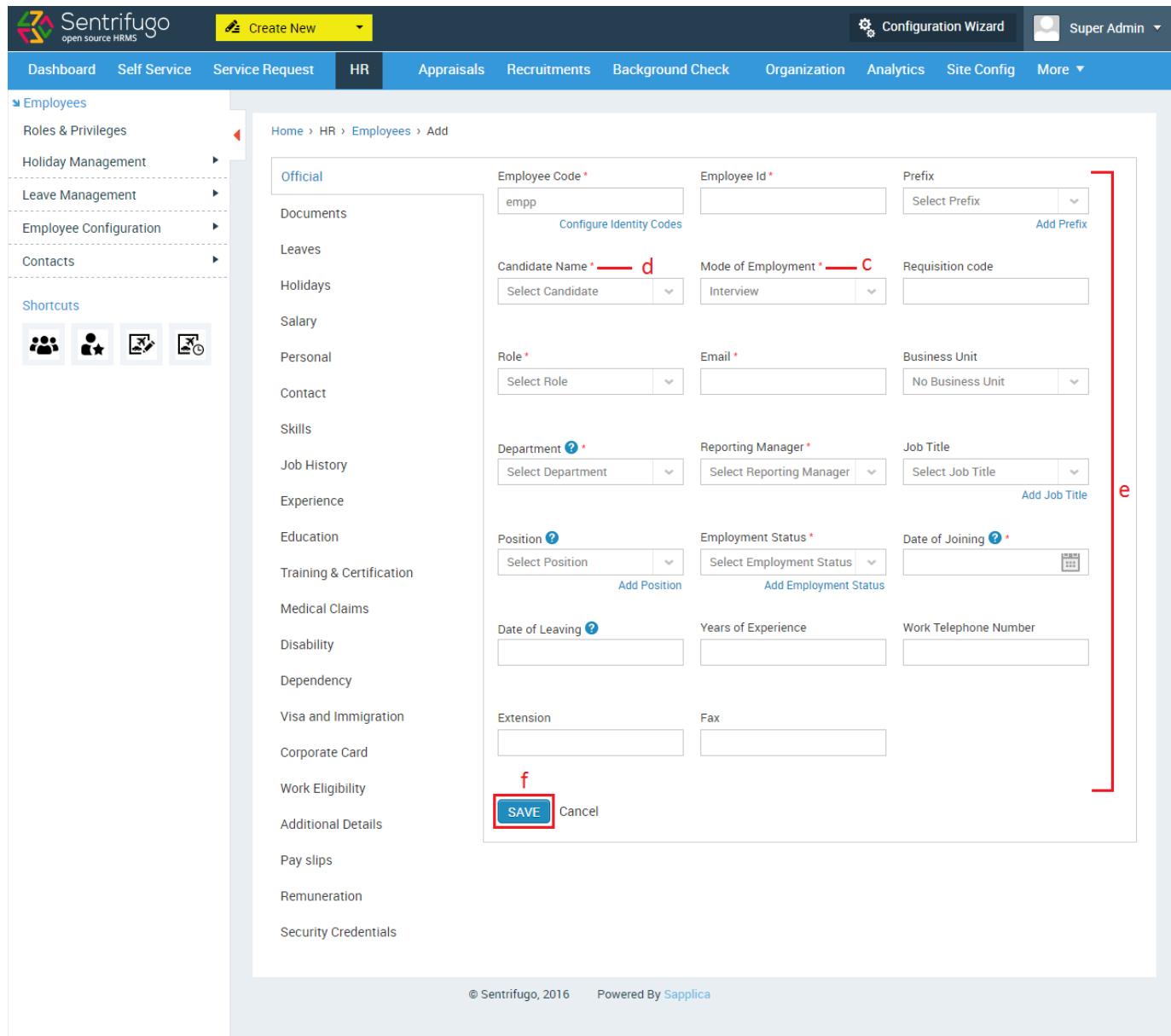
The screenshot shows the Sentrifugo HR module interface. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR (which is highlighted with a red box and labeled 'a'), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. Below the navigation bar is a sidebar titled 'Employees' with sections for Roles & Privileges, Holiday Management, Leave Management, Employee Configuration, and Contacts. Under 'Shortcuts', there are four icons: a group of people, a star, a magnifying glass, and a gear. The main content area shows a list of employees with their names, roles, and contact information. At the top of this list area, there's a search bar and buttons for 'Import Employees', 'Import format', 'Help', and a red-bordered '+Add' button (labeled 'b').

Name	Role	Contact Information
Jim Carl	Employee Development	EMPP00011 jimcarl@example.com 586858714589
Anderson Neo	Manager Human Resource	EMPP00005 anderson@example.com 854703225985
Ruby Jackson	Employee Development	EMPP001 ruby@example.com 774478547955
Johnty Rodhes	Manager Quality Assurance	EMPP00004 johnty@example.com 258487845454

Figure 113

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

Please refer Figure 114



The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes the logo, a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. The main menu has categories like Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. Under the HR category, there's a 'Employees' section with sub-links: Roles & Privileges, Holiday Management, Leave Management, Employee Configuration, and Contacts. Below this is a 'Shortcuts' section with icons for users, roles, documents, and contacts. The central content area shows the 'Add' form for an employee. The form fields include: Employee Code \* (empp), Employee Id \*, Prefix (dropdown with 'Select Prefix' and 'Add Prefix' buttons), Candidate Name \* (dropdown with 'Select Candidate' and 'd' highlighted), Mode of Employment \* (dropdown with 'Interview' and 'C' highlighted), Requisition code (empty), Role \* (dropdown with 'Select Role'), Email \* (empty), Business Unit (dropdown with 'No Business Unit'), Department ? \* (dropdown with 'Select Department'), Reporting Manager \* (dropdown with 'Select Reporting Manager'), Job Title (dropdown with 'Select Job Title' and 'Add Job Title' button), Position ? (dropdown with 'Select Position' and 'Add Position' button), Employment Status \* (dropdown with 'Select Employment Status' and 'Add Employment Status' button), Date of Joining ? \* (empty), Date of Leaving ? (empty), Years of Experience (empty), Work Telephone Number (empty), Extension (empty), Fax (empty), and Pay slips (empty). At the bottom are 'Cancel' and 'SAVE' buttons, with 'f' highlighting the 'SAVE' button.

Figure 114

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

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

Create New Configuration Wizard Super Admin

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

Openings/Positions
Approved Requisitions
Rejected Requisitions
Candidates
Interviews
Shortlisted & Selected Candidates

**Shortcuts**

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

Home > Recruitments > Approved Requisitions > View
Edit

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

**REQUISITION DETAILS**

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

**JOB DETAILS**

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

**Candidate details**

Candidate Name	Candidate Status
No data found	

**REQUISITION HISTORY**

- Requisition status has been changed as Approved by Anderson Neo  
2016-12-19 11:23 PM
- Requisition status has been Approved by Andrew Joel  
2016-12-14 02:17 AM
- Requisition has been Created by Anderson Neo  
2016-12-14 02:11 AM

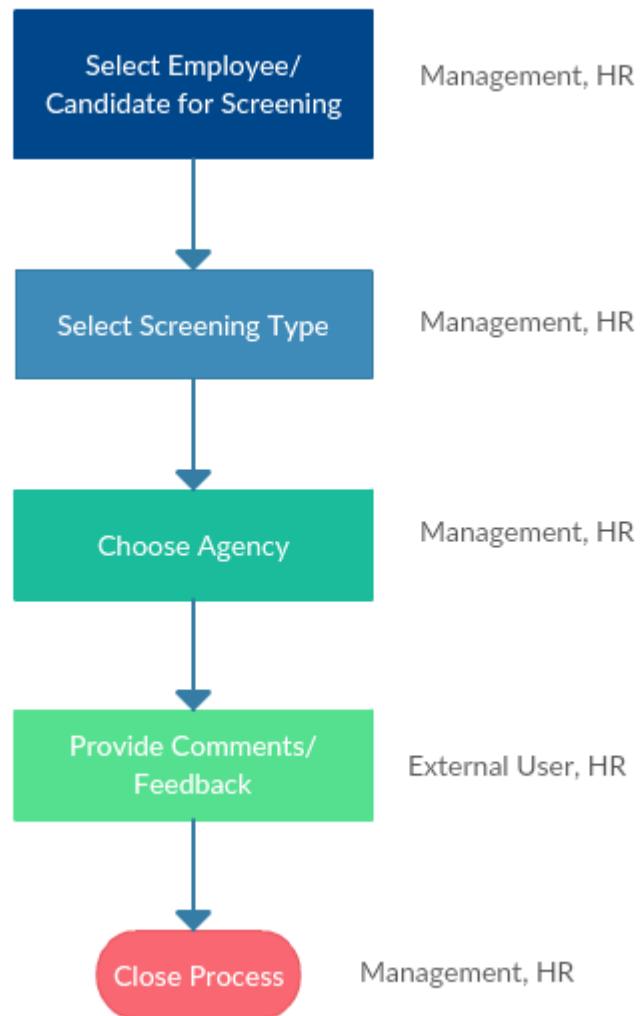
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## 8. Background Check

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



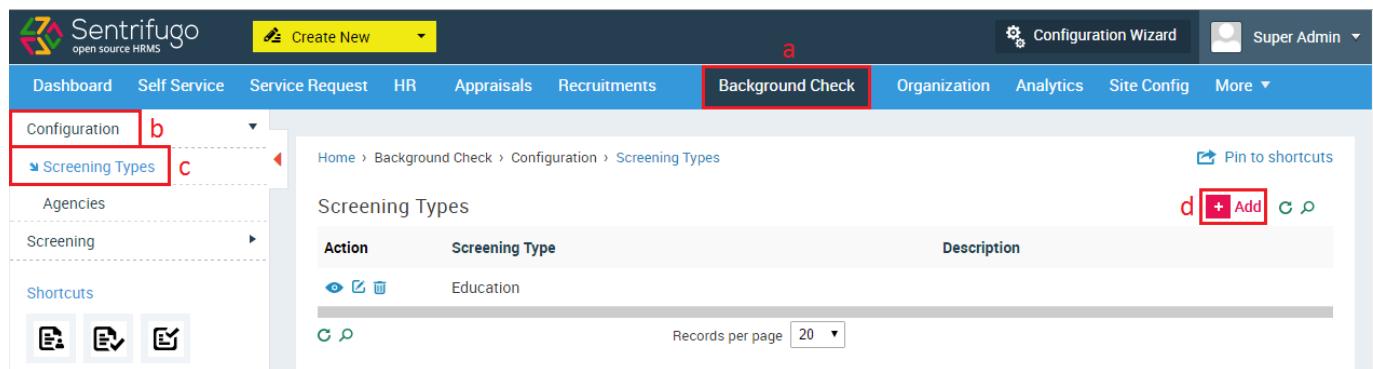
### Description:

- A User (Management, HR) selects an employee or candidate to have a background check performed on him/her

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

## 8.1 How do I add a Screening Type?

Please refer Figure 115

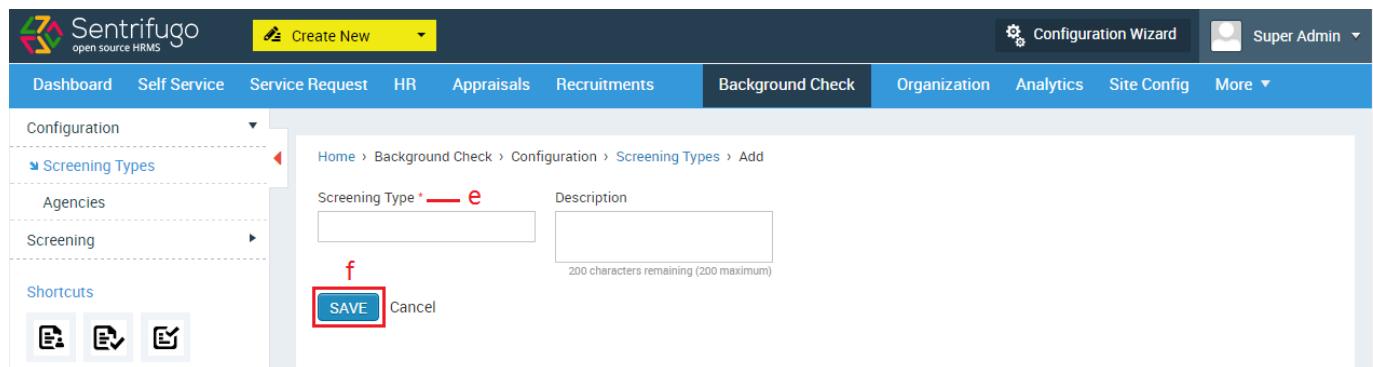


The screenshot shows the Sentrifugo application interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (which is highlighted with a red box), Configuration Wizard, Super Admin, and more. On the left, a sidebar menu has 'Configuration' expanded, with 'Screening Types' selected (also highlighted with a red box). The main content area displays a table titled 'Screening Types' with one row: 'Education'. Action buttons for edit and delete are shown next to each row. A red box labeled 'd' points to the '+Add' button on the right side of the table. The URL in the browser is 'Home > Background Check > Configuration > Screening Types'.

Figure 115

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

Please refer Figure 116



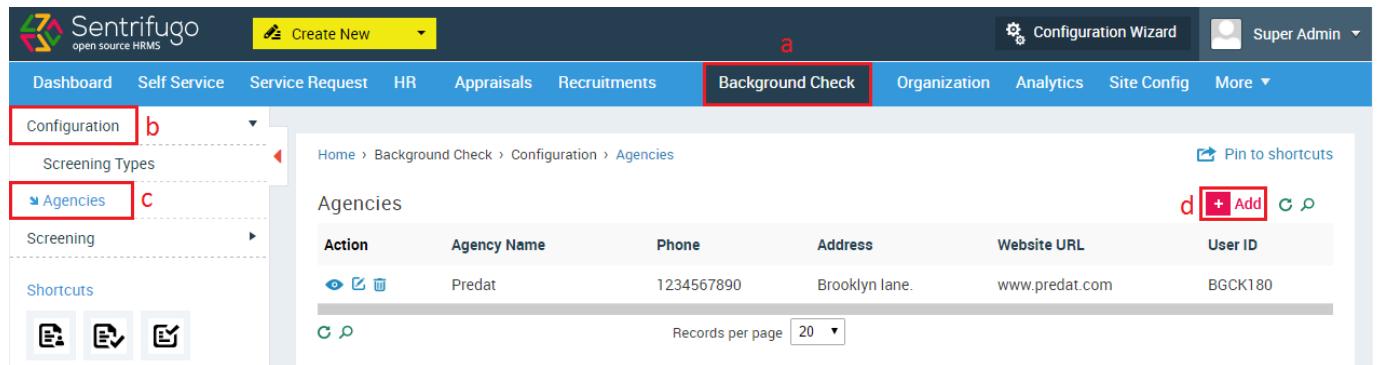
The screenshot shows the 'Add Screening Type' form. The top navigation bar and sidebar are identical to Figure 115. The main content area shows a form with fields for 'Screening Type \*' (labeled 'e') and 'Description'. Below the fields is a note: '200 characters remaining (200 maximum)'. At the bottom are 'SAVE' and 'Cancel' buttons, with 'SAVE' highlighted with a red box. The URL in the browser is 'Home > Background Check > Configuration > Screening Types > Add'.

Figure 116

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

## 8.2 How do I add an Agency?

Please refer Figure 117

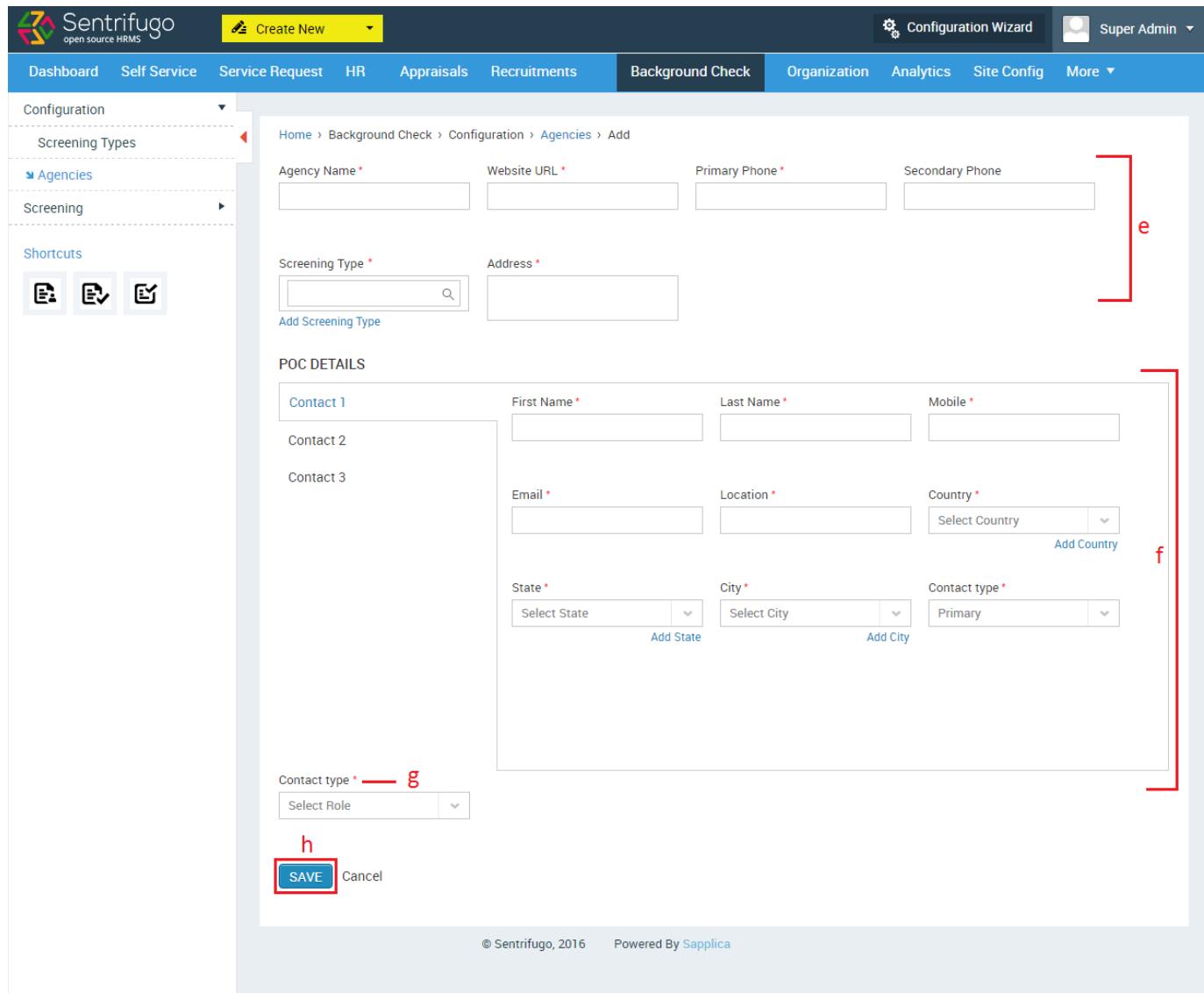


Action	Agency Name	Phone	Address	Website URL	User ID
	Predat	1234567890	Brooklyn lane.	www.predat.com	BGCK180

Figure 117

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

Please refer Figure 118



The screenshot shows the Sentrifugo web interface for 'Background Check' configuration. The left sidebar has sections for Configuration, Screening Types, Agencies (selected), Screening, and Shortcuts. The main area shows a 'Home > Background Check > Configuration > Agencies > Add' path. The form fields include:

- Agency Name \*** (highlighted with red bracket e)
- Website URL \***
- Primary Phone \***
- Secondary Phone**
- Screening Type \*** (highlighted with red bracket f)
- Address \***
- Add Screening Type**
- POC DETAILS** section:
  - Contact 1**: First Name \*, Last Name \*, Mobile \*
  - Contact 2**
  - Contact 3**: Email \*, Location \*, Country \* (highlighted with red bracket f)
    - Select Country
    - Add Country
  - State \*** (highlighted with red bracket f): Select State, Add State
  - City \*** (highlighted with red bracket f): Select City, Add City
  - Contact type \*** (highlighted with red bracket f): Primary
- Contact type \*** (highlighted with red bracket g): Select Role
- SAVE** button (highlighted with red bracket h)
- Cancel**

Annotations:

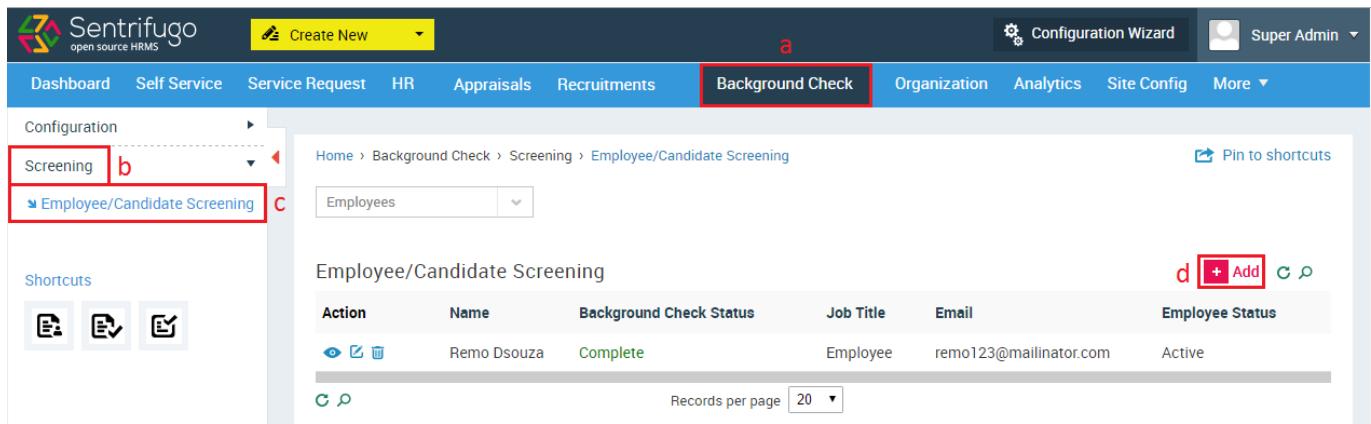
- e**: Points to the 'Agency Name' field.
- f**: Points to the 'Screening Type' field and its associated dropdown.
- g**: Points to the 'Contact type' dropdown.
- h**: Points to the 'SAVE' button.

Figure 118

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

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

Please refer Figure 119



The screenshot shows the Sentrifugo open source HRMS application. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (which is highlighted with a red box), Configuration Wizard, Super Admin, and more. The left sidebar has a Configuration section with a Screening link (also highlighted with a red box) and a submenu for Employee/Candidate Screening (highlighted with a red box). The main content area displays the 'Employee/Candidate Screening' page with a table showing one record:

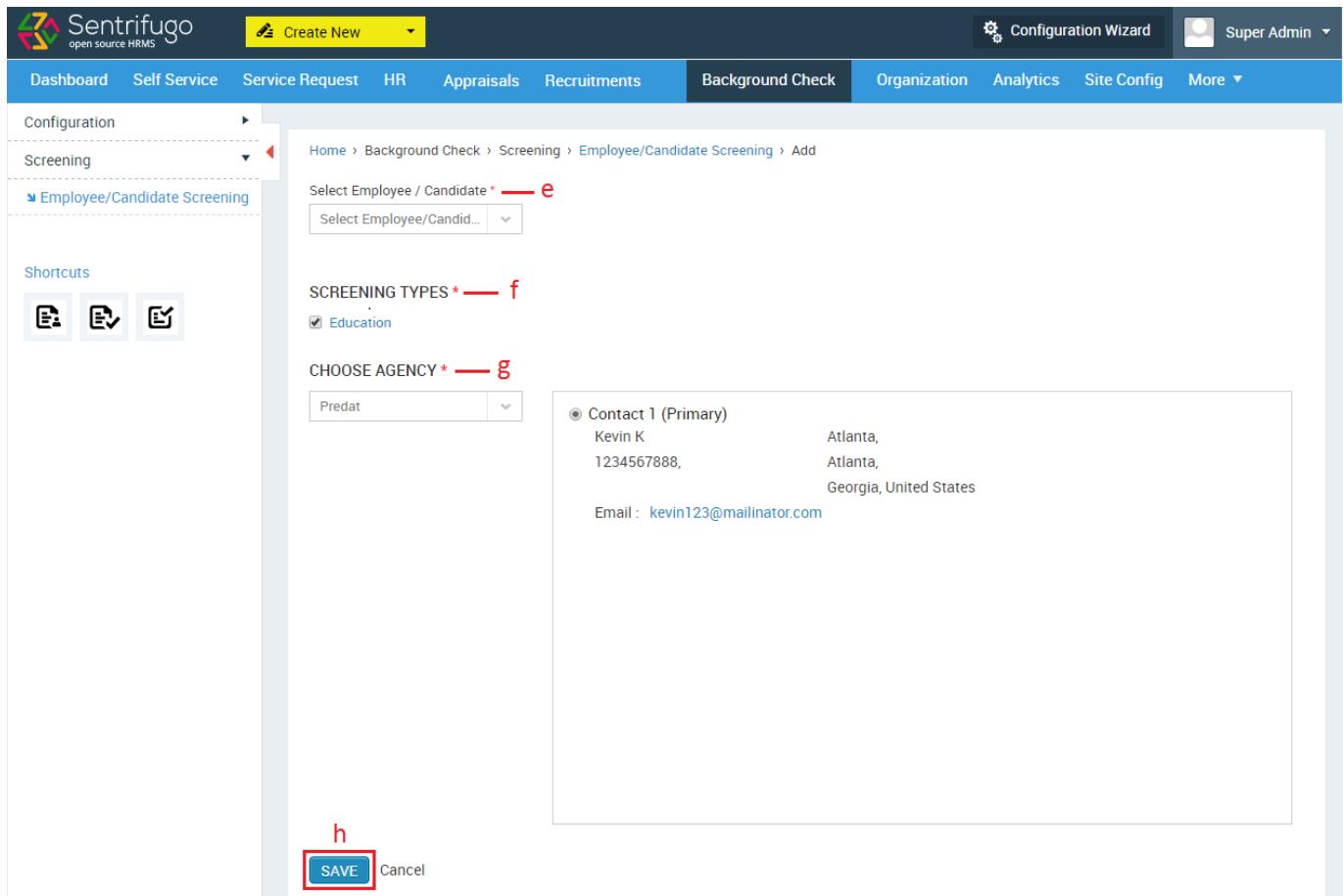
Action	Name	Background Check Status	Job Title	Email	Employee Status
	Remo Dsouza	Complete	Employee	remo123@mailinator.com	Active

Below the table are buttons for 'Records per page' (set to 20) and a search bar. On the right side of the table, there is a '+Add' button (highlighted with a red box).

Figure 119

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

Please refer Figure 120



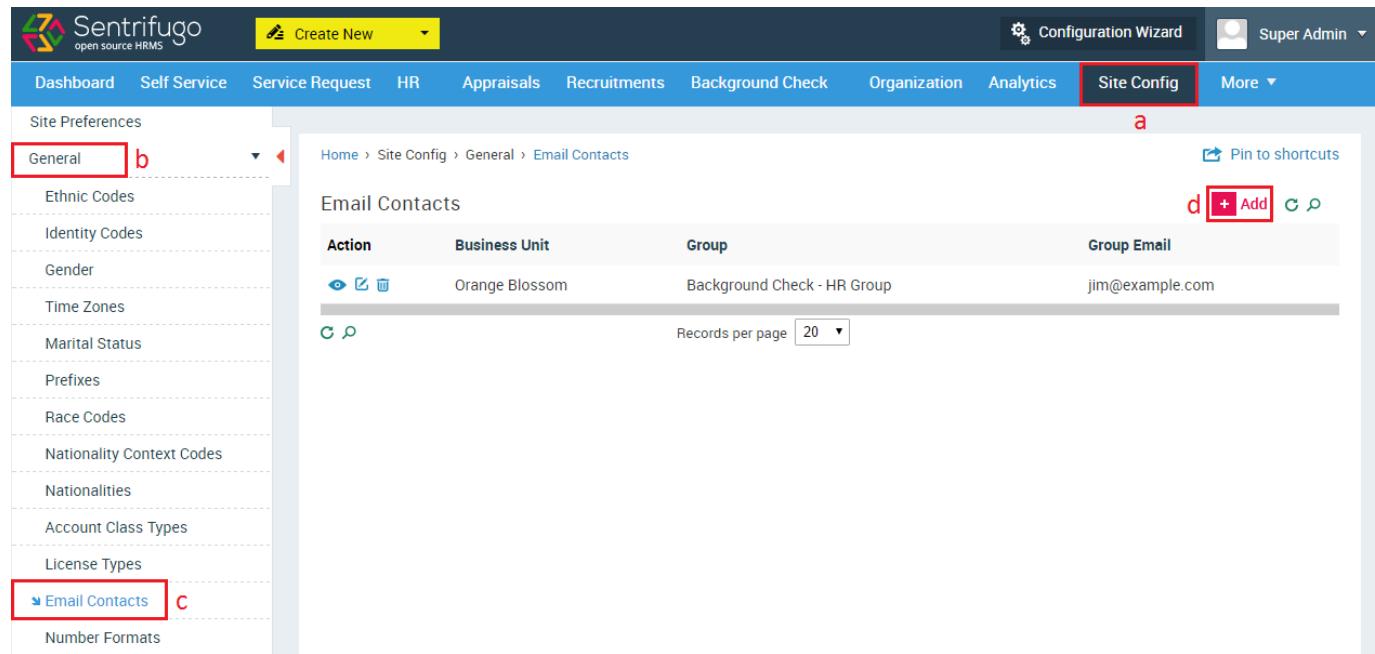
The screenshot shows the Sentrifugo open source HRMS application. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A Configuration Wizard icon and a Super Admin dropdown are also present. The left sidebar has sections for Configuration, Screening, and Employee/Candidate Screening. The main content area displays a form for adding a screening record. Step e shows a dropdown menu for selecting an employee/candidate. Step f shows a checkbox for 'Education'. Step g shows a dropdown menu for choosing an agency, with 'Predat' selected. Step h shows the 'SAVE' button highlighted with a red box.

Figure 120

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

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

Please refer Figure 121



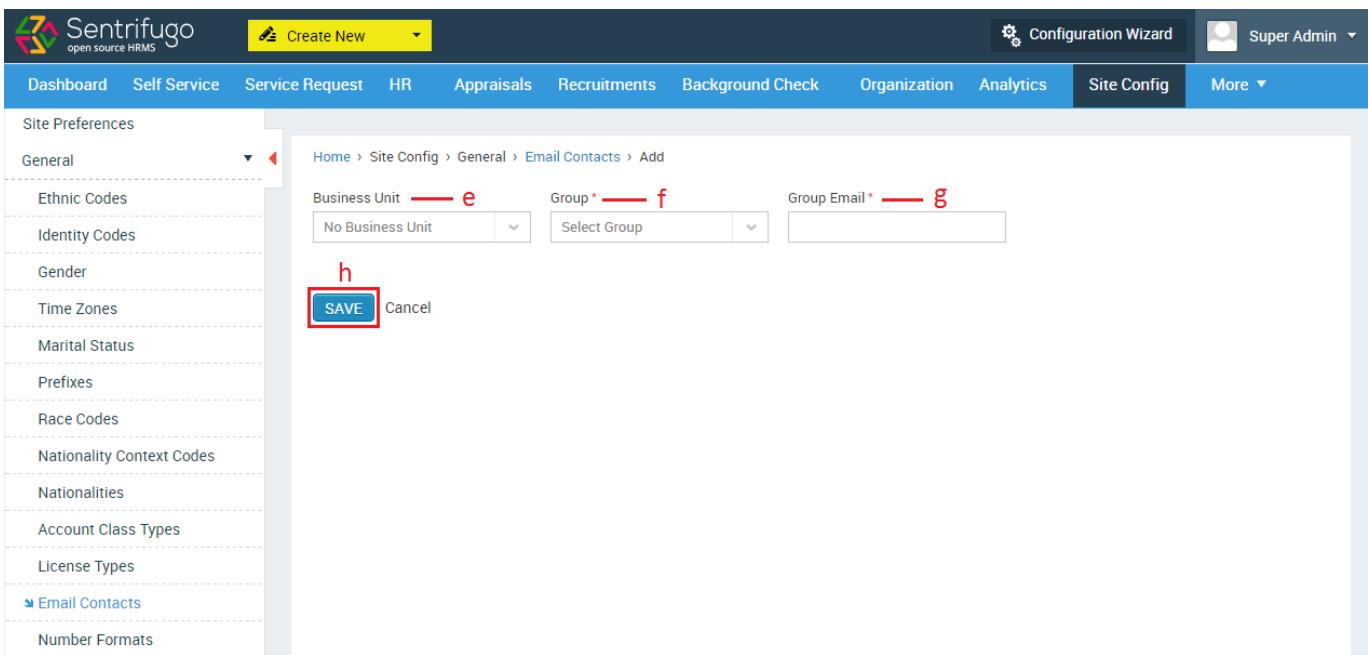
The screenshot shows the Sentrifugo open source HRMS interface. The top navigation bar includes the logo, a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. The main menu has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, and Site Config (which is highlighted with a red box and labeled 'a'). A secondary navigation bar under 'Site Preferences' shows links like General (highlighted with a red box and labeled 'b'), Ethnic Codes, Identity Codes, Gender, Time Zones, Marital Status, Prefixes, Race Codes, Nationality Context Codes, Nationalities, Account Class Types, License Types, Email Contacts (highlighted with a red box and labeled 'c'), and Number Formats. The central content area displays the 'Email Contacts' page with a table showing one record: Action (eye, edit, delete), Business Unit (Orange Blossom), Group (Background Check - HR Group), and Group Email (jim@example.com). The top right of this page has a 'Pin to shortcuts' link and a '+Add' button (highlighted with a red box and labeled 'd'). The URL in the browser is Home > Site Config > General > Email Contacts.

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

Figure 121

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

Please refer Figure 122



The screenshot shows the Sentrifugo interface for adding a new email contact. On the left, a sidebar lists various site preferences like Ethnic Codes, Identity Codes, Gender, Time Zones, etc. The main panel shows a breadcrumb path: Home > Site Config > General > Email Contacts > Add. It has fields for Business Unit (with 'No Business Unit' selected), Group (with 'Select Group' dropdown), and Group Email (with placeholder 'g'). A red box surrounds the 'SAVE' button, which is labeled 'h'.

Figure 122

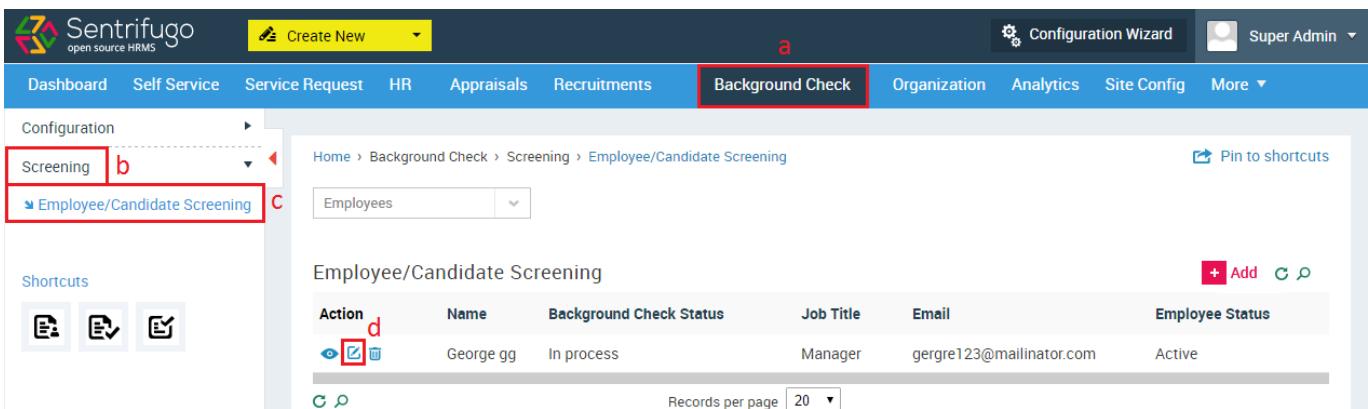
- e. Select the business unit the HR group
- f. Select 'Background Check – HR Group' (HR)/ 'Background Check' Management Group (Management)
- g. Enter group email id
- h. Click **SAVE** button



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

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

Please refer Figure 123

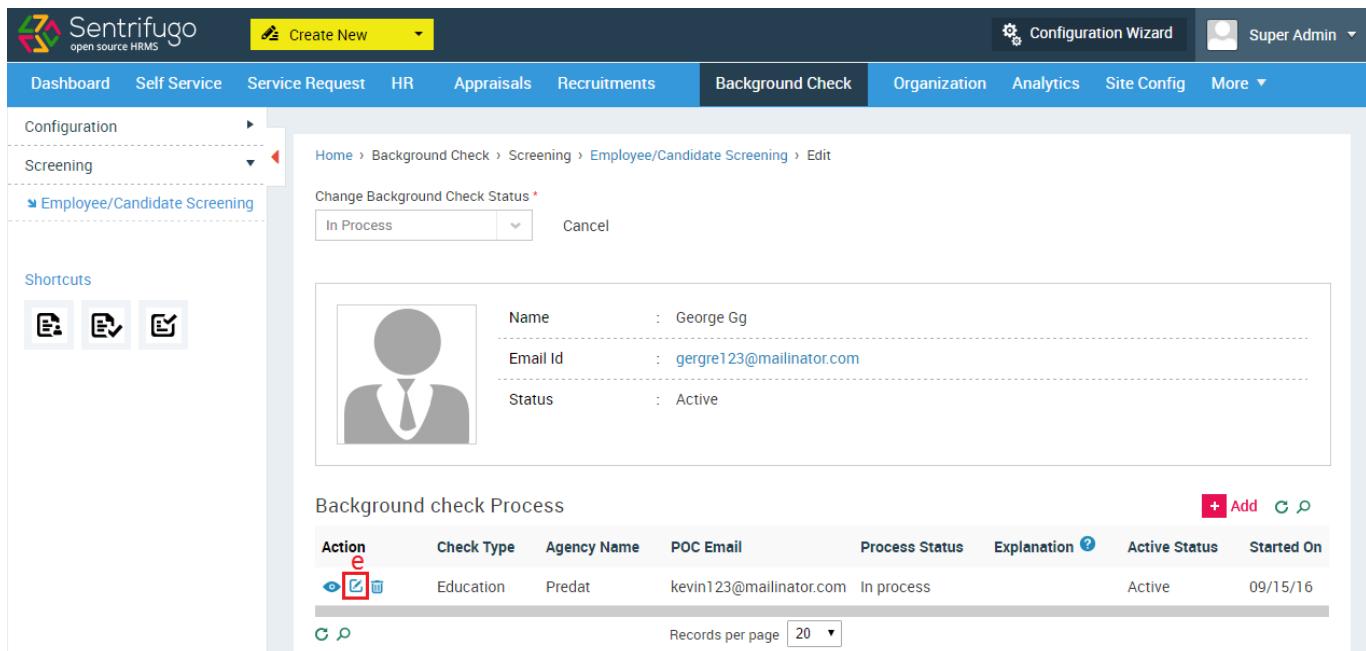


The screenshot shows the Sentrifugo interface for managing employee/candidate screening. The top navigation bar has 'Background Check' highlighted with a red box 'a'. The sidebar has 'Screening' selected, with 'Employee/Candidate Screening' highlighted with a red box 'b'. In the main content area, there's a table titled 'Employee/Candidate Screening' showing one record: George gg (Status: In process, Job Title: Manager, Email: gerger123@mailinator.com, Employee Status: Active). The 'Edit' icon in the table header is highlighted with a red box 'd'. There are also icons for 'Add' and 'Search' in the table header.

Figure 123

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

Please refer Figure 124



The screenshot shows the Sentrifugo open source HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (which is highlighted), Configuration Wizard, Super Admin, and more. On the left, a sidebar menu shows Configuration, Screening, and Employee/Candidate Screening. Under Employee/Candidate Screening, there are three icons: a person (Edit), a document (View), and a trash can (Delete). The main content area shows a modal dialog titled 'Change Background Check Status \*' with a dropdown menu set to 'In Process' and a 'Cancel' button. Below the modal, there is a summary card for an employee named George Gg, showing details like Name: George Gg, Email Id: george123@mailinator.com, and Status: Active. At the bottom of the card is a small profile picture of a person in a suit. Below this card is a table titled 'Background check Process'. The table has columns for Action, Check Type, Agency Name, POC Email, Process Status, Explanation, Active Status, and Started On. One row is visible, showing Education as the Check Type, Predat as the Agency Name, kevin123@mailinator.com as the POC Email, In process as the Process Status, Active as the Active Status, and 09/15/16 as the Started On date. The 'Action' column for this row has an edit icon with a red border around it, indicating it's the target for step e.

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

Figure 124

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

Please refer Figure 125

**Background check Process**

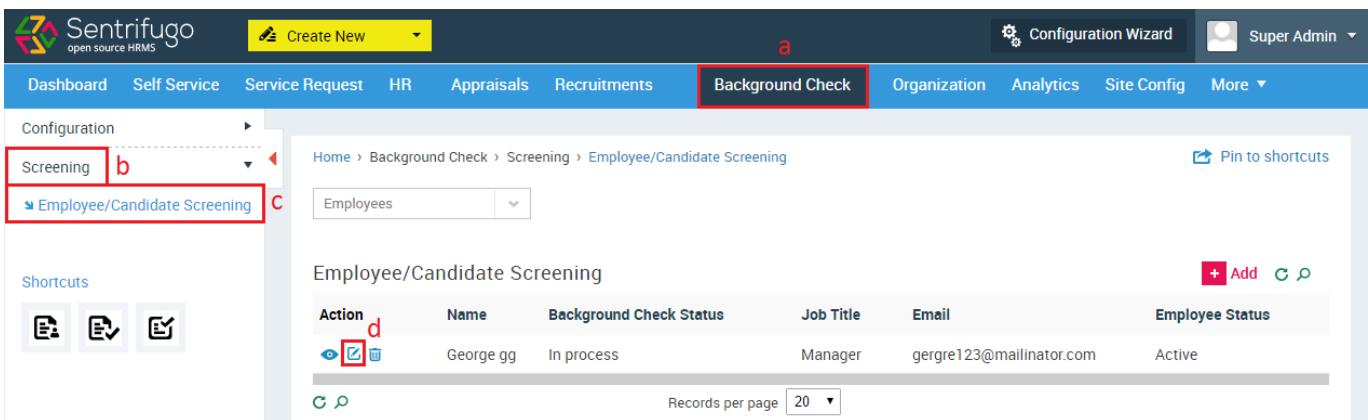
Change Background Check Status *	<input type="text" value="In Process"/>	UPLOAD FEEDBACK DOCUMENT ? — f
		<input type="button" value="Upload Feedback File"/>
		<input style="outline: 2px solid red;" type="button" value="SAVE"/> g
AGENCY & POC DETAILS		
Check Type	: Education	ENTER COMMENTS / FEEDBACK — h
Agency Name	: Predat	<input type="text"/>
Contact Person Name	Kevin K	<input style="outline: 2px solid red;" type="button" value="POST"/> i
Contact Number	: 1234567888	No comments posted
Email	: kevin123@mailinator.com	<input type="text"/>
Address	: Atlanta, Atlanta, Georgia, United States	<input type="text"/>
<input type="button" value="CLOSE"/>		

Figure 125

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

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

Please refer Figure 126

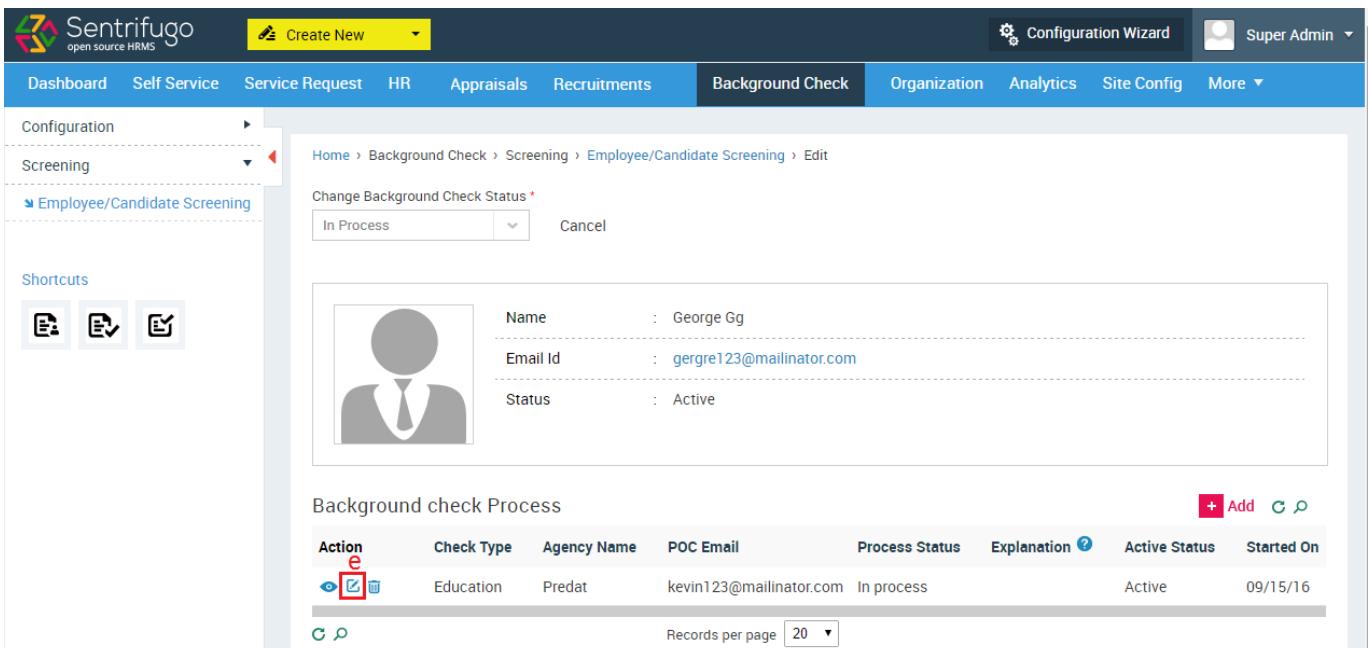


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has items like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (which is highlighted with a red box), Organization, Analytics, Site Config, and More. On the left, a sidebar for 'Configuration' has 'Screening' selected (also highlighted with a red box). Under 'Screening', 'Employee/Candidate Screening' is listed. The main content area shows a grid titled 'Employee/Candidate Screening' with columns: Action, Name, Background Check Status, Job Title, Email, and Employee Status. One row is visible for 'George gg' with status 'In process'. At the bottom, there are buttons for 'Add', 'Edit', and 'Delete'.

Figure 126

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

Please refer Figure 127



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has items like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (highlighted with a red box), Organization, Analytics, Site Config, and More. On the left, a sidebar for 'Configuration' has 'Screening' selected. Under 'Screening', 'Employee/Candidate Screening' is listed. The main content area shows a form to 'Change Background Check Status' with a dropdown set to 'In Process' and a 'Cancel' button. Below this is a grid titled 'Background check Process' with columns: Action, Check Type, Agency Name, POC Email, Process Status, Explanation, Active Status, and Started On. One row is visible for 'Education' with status 'In process'. At the bottom, there are buttons for 'Add', 'Edit', and 'Delete'.

Figure 127

#### To close a specific Background process:

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

Please refer Figure 128

### Background check Process

Change Background Check Status \* —— g

Complete

**SAVE** —— h

UPLOAD FEEDBACK DOCUMENT ? —— f

Upload Feedback File

**SAVE**

AGENCY & POC DETAILS

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

**CLOSE**

ENTER COMMENTS / FEEDBACK

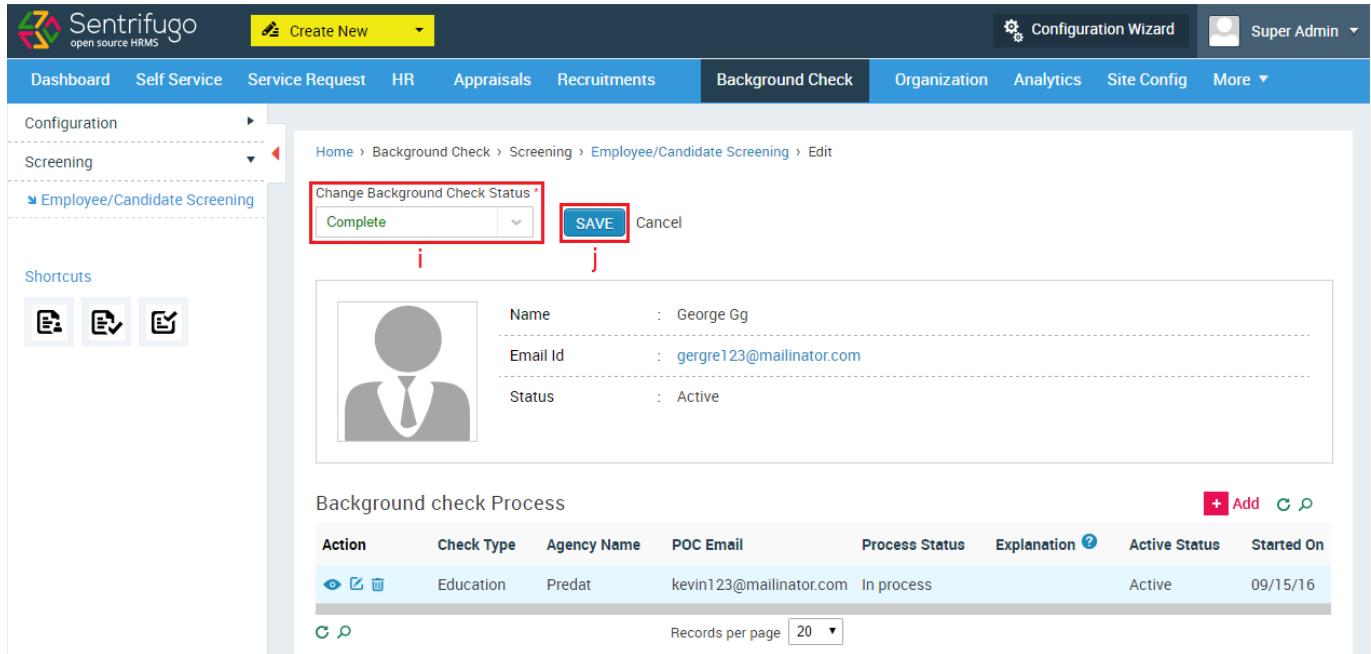
**POST**

No comments posted

Figure 128

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

Please refer Figure 129



The screenshot shows the Sentrifugo HRMS application interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (which is highlighted in blue), Organization, Analytics, Site Config, and More. On the far right, there are links for Configuration Wizard, Super Admin, and a user profile icon.

The main content area shows a breadcrumb navigation path: Home > Background Check > Screening > Employee/Candidate Screening > Edit. Below this, there is a form titled "Change Background Check Status". The status dropdown is set to "Complete" and has a red box around it. Next to it is a blue "SAVE" button with a red box around it, and a "Cancel" link. Below the form, there is a user profile picture and some basic information: Name: George Gg, Email Id: gergre123@mailinator.com, and Status: Active.

At the bottom, there is a section titled "Background check Process" with a table. The table has columns: Action, Check Type, Agency Name, POC Email, Process Status, Explanation, Active Status, and Started On. One row is visible: Action (with icons for eye, edit, delete), Check Type: Education, Agency Name: Predat, POC Email: kevin123@mailinator.com, Process Status: In process, Explanation: (empty), Active Status: Active, and Started On: 09/15/16. There are also "Add" and "Search" buttons at the top of this table.

Figure 130

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

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

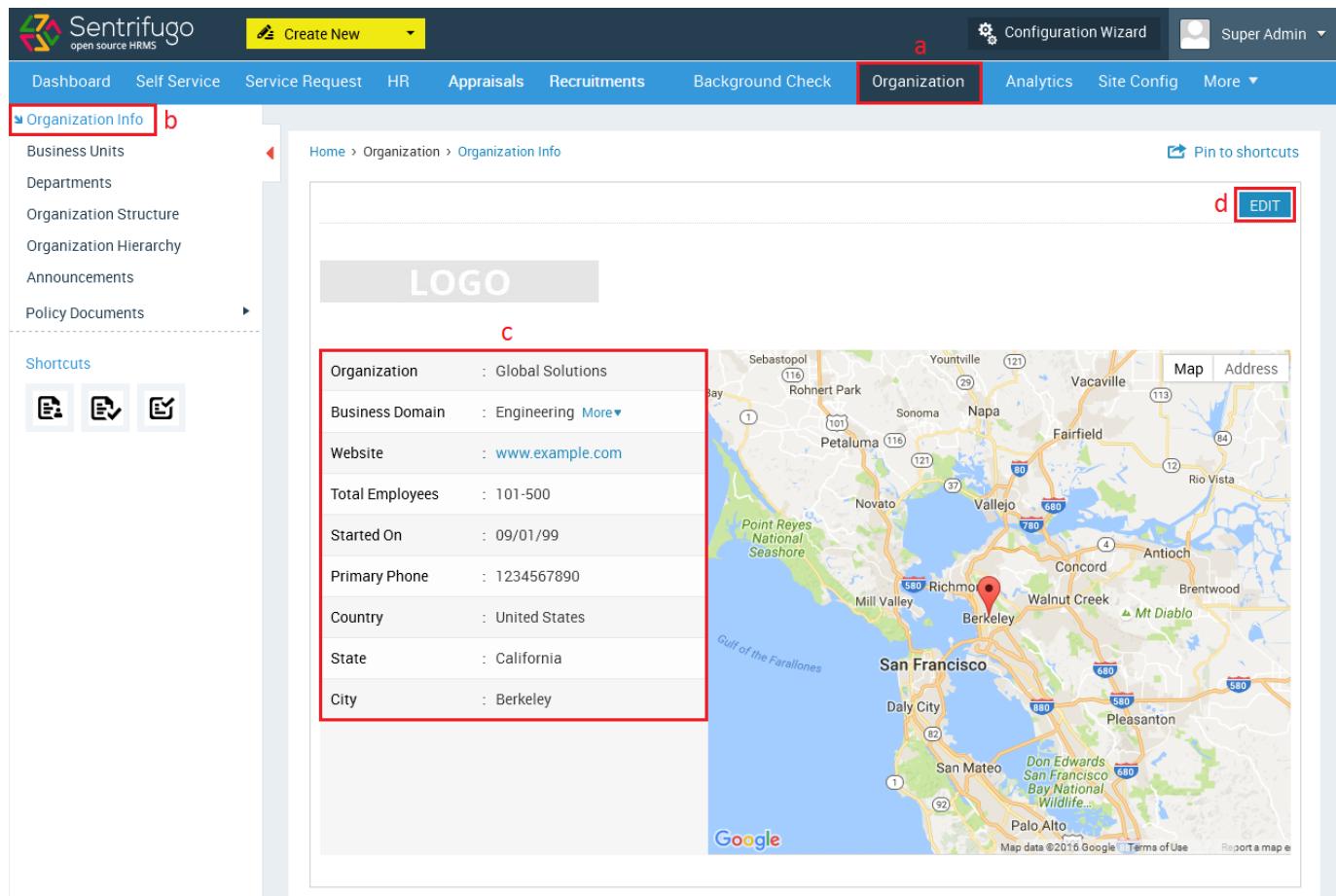
## 9. Organization

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

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

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

Please refer Figure 131



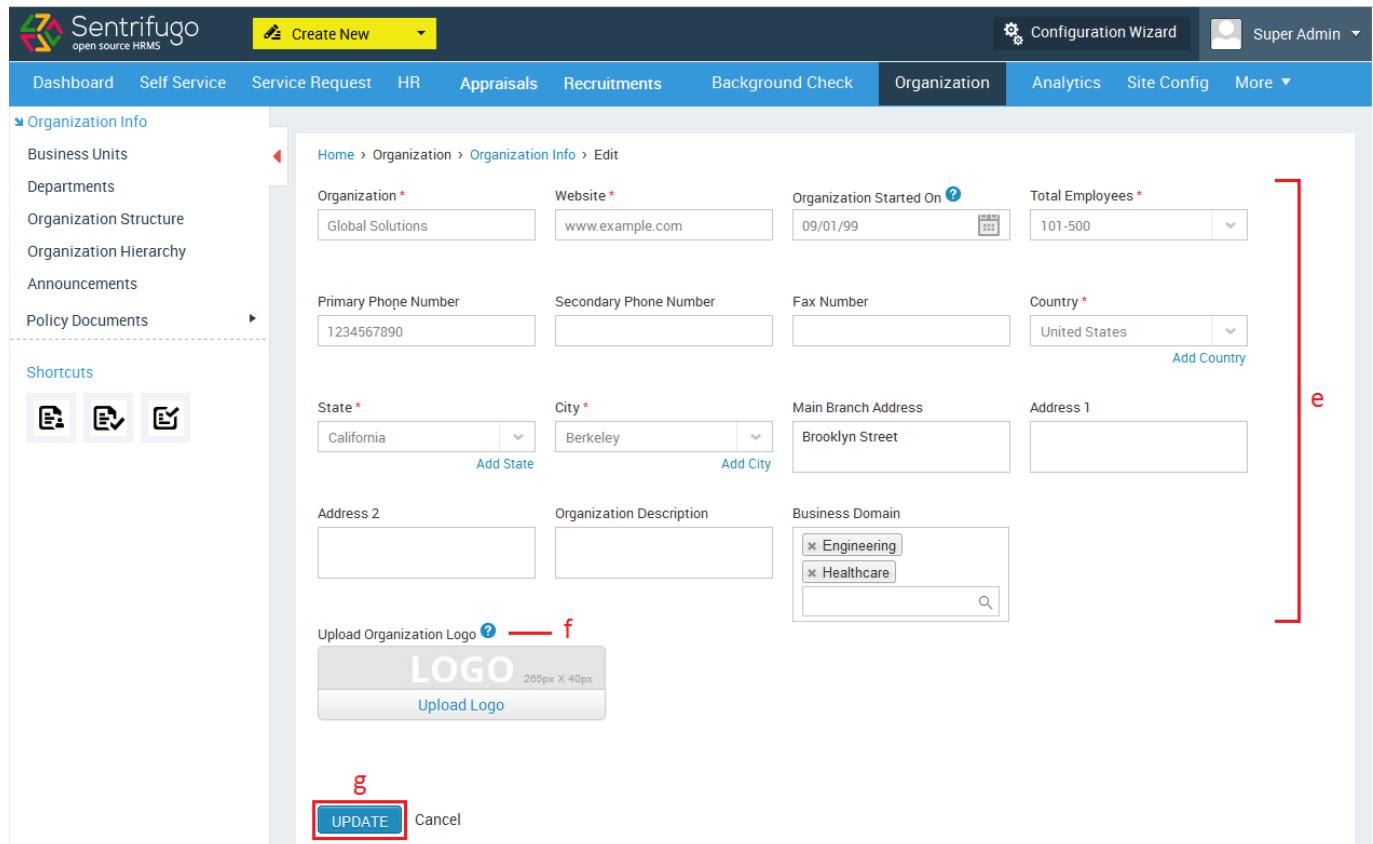
The screenshot shows the Sentrifugo application interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, **Organization**, Analytics, Site Config, More, and a Configuration Wizard. A Super Admin user is logged in. On the left, a sidebar has a 'Organization Info' section with links for Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, and Policy Documents. Below this is a 'Shortcuts' section with three icons. The main content area shows a breadcrumb path: Home > Organization > Organization Info. It features a placeholder 'LOGO' and a table of organization details. To the right is a map of the San Francisco Bay Area with a red marker indicating the location. An 'EDIT' button is located in the top right corner of the main content area. The table details are as follows:

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

Figure 131

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

Please refer Figure 132



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization (selected), Analytics, Site Config, and More. The left sidebar has sections for Organization Info (Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, Policy Documents) and Shortcuts. The main content area displays organization details for 'Global Solutions': Website (www.example.com), Organization Started On (09/01/99), Total Employees (101-500), Primary Phone Number (1234567890), Secondary Phone Number, Fax Number, Country (United States), State (California), City (Berkeley), Main Branch Address (Brooklyn Street), Address 1, Address 2, Organization Description, Business Domain (Engineering, Healthcare), and an Upload Organization Logo section (265px X 40px). The bottom right of the form has 'UPDATE' and 'Cancel' buttons.

Figure 132

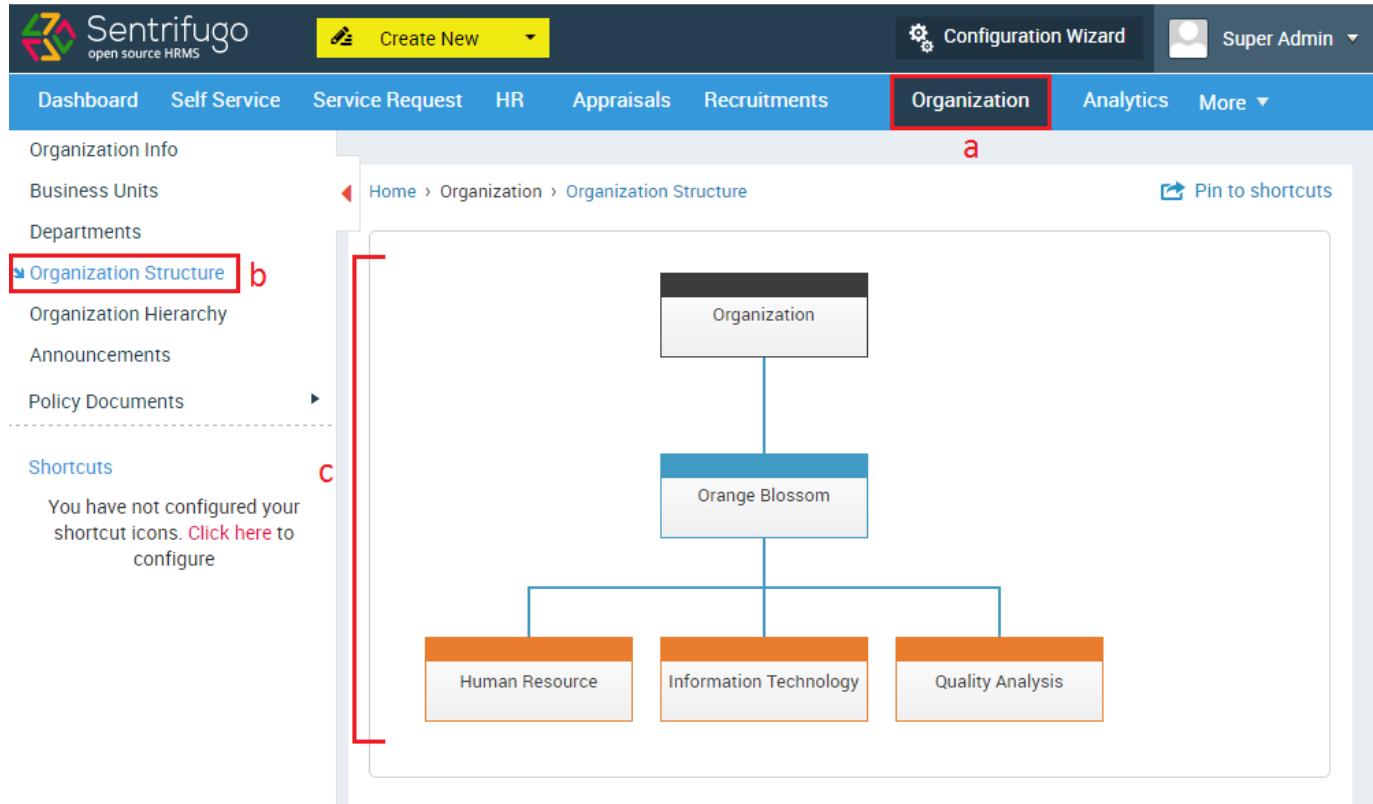
- e. Enter or modify details
- f. You can change your company logo
- g. Click **UPDATE** button

## Business Units & Departments

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

## 9.2 How do I view my Organization Structure?

Please refer Figure 133



The screenshot shows the Sentrifugo application interface. At the top, there is a navigation bar with the brand logo, a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. Below the navigation bar, a horizontal menu bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization' (which is highlighted with a red border), 'Analytics', and 'More'. On the left side, a vertical sidebar panel has sections for 'Organization Info', 'Business Units', 'Departments', and 'Shortcuts'. Under 'Shortcuts', it says 'You have not configured your shortcut icons. Click here to configure'. A red box labeled 'b' highlights the 'Organization Structure' link under 'Shortcuts'. A red bracket labeled 'c' points from the 'Organization Structure' link in the sidebar to the organization chart in the main content area. The main content area displays an organization hierarchy diagram. The root node is 'Organization', which branches down to 'Orange Blossom'. 'Orange Blossom' further branches into three nodes: 'Human Resource', 'Information Technology', and 'Quality Analysis'. The entire organization chart is enclosed in a light gray box. At the top of this box, there is a breadcrumb trail 'Home > Organization > Organization Structure' and a 'Pin to shortcuts' link.

Figure 133

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



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

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

Please refer Figure 134

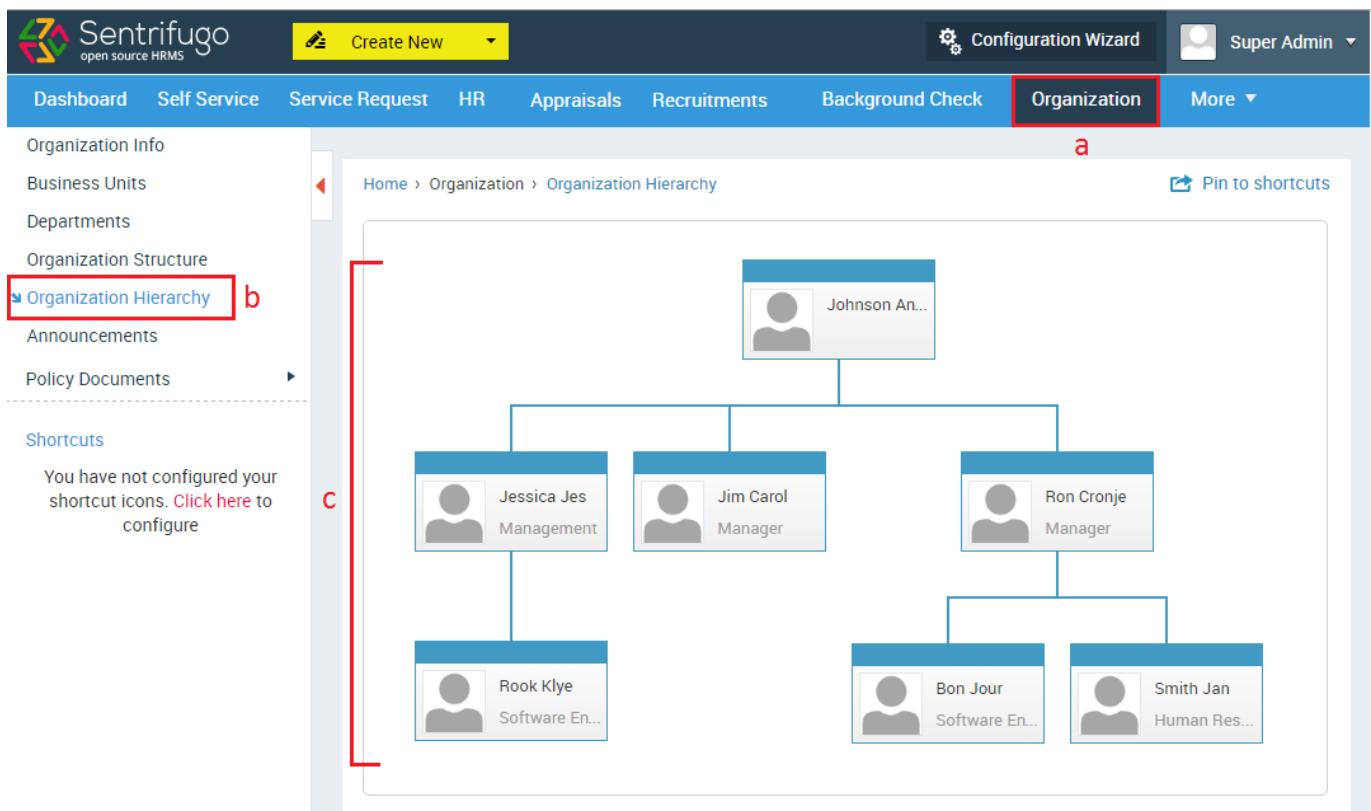


Figure 134

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



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

## 9.4 How do I add Announcements?

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

## 9.5 How do I add Policy Documents?

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

Please refer Figure 135

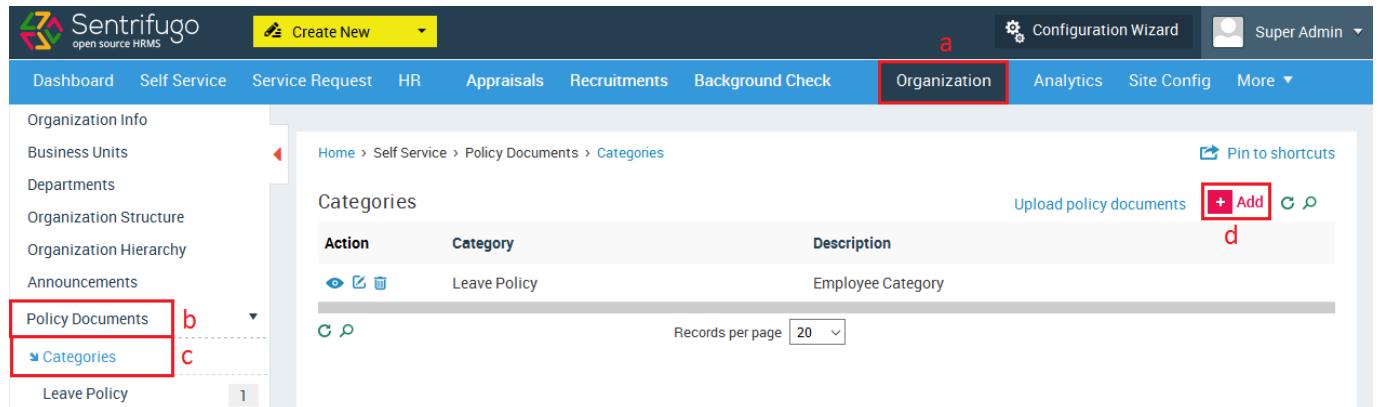


Figure 135

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

Please refer Figure 136

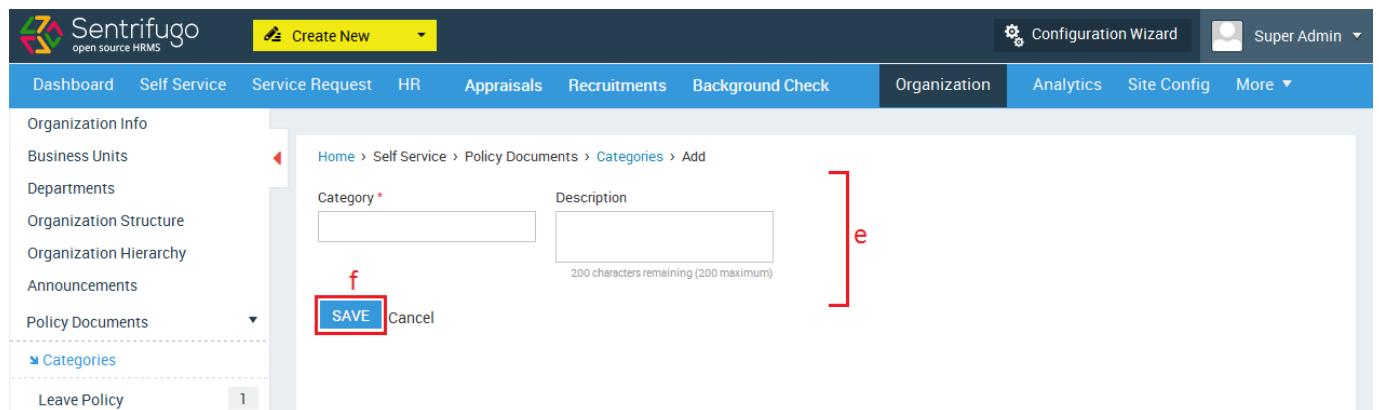
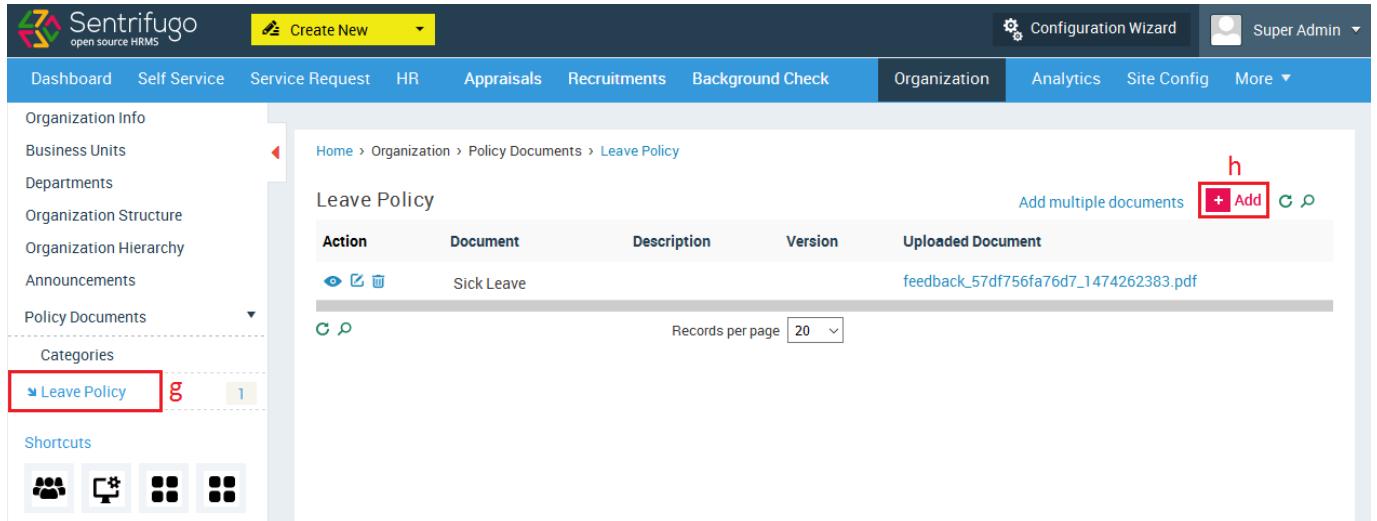


Figure 136

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

Please refer Figure 137

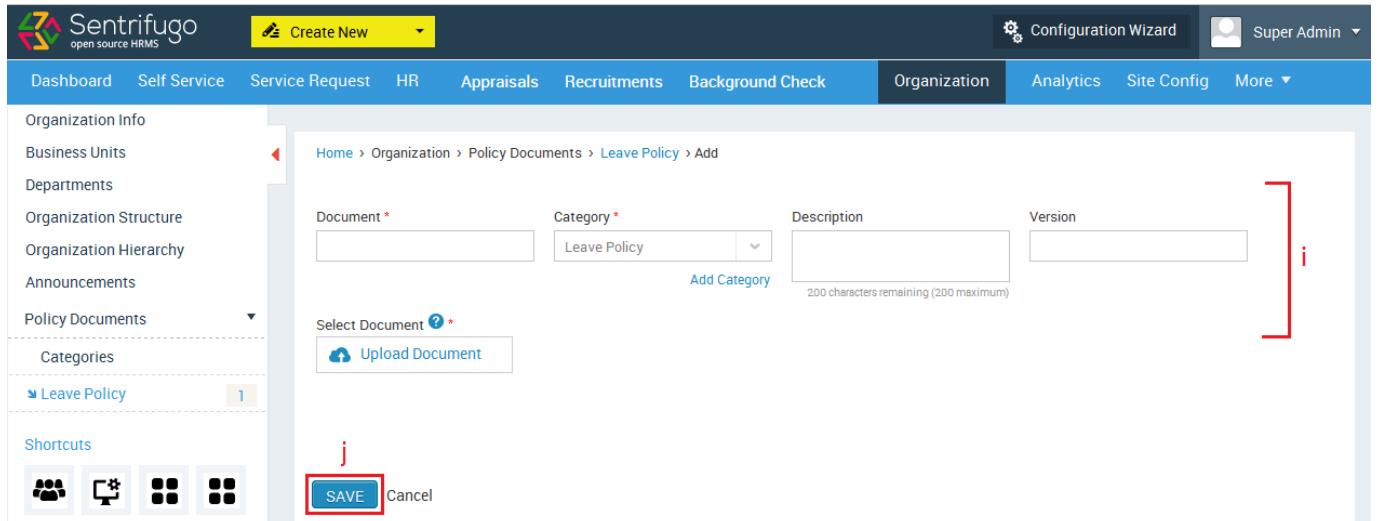


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The left sidebar has sections for Organization Info, Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, Policy Documents (with 'Leave Policy' selected), Categories, and Shortcuts. The main content area displays a table titled 'Leave Policy' with columns for Action, Document, Description, Version, and Uploaded Document. One record is listed: 'Sick Leave' with the file 'feedback\_57df756fa76d7\_1474262383.pdf'. There are buttons for Add multiple documents and +Add. The bottom of the table shows a Records per page dropdown set to 20.

Figure 137

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

Please refer Figure 138



The screenshot shows the 'Leave Policy' add form. It has fields for Document\*, Category\* (set to 'Leave Policy'), Description, and Version. Below these are sections for Select Document (with 'Upload Document' button) and a note about character limit (200 characters remaining). At the bottom are 'SAVE' and 'Cancel' buttons. A red bracket labeled 'i' points to the 'Category' dropdown. A red box labeled 'j' points to the 'SAVE' button.

Figure 138

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

## 9.6 How do I view Policy Documents?

Please refer Figure 139

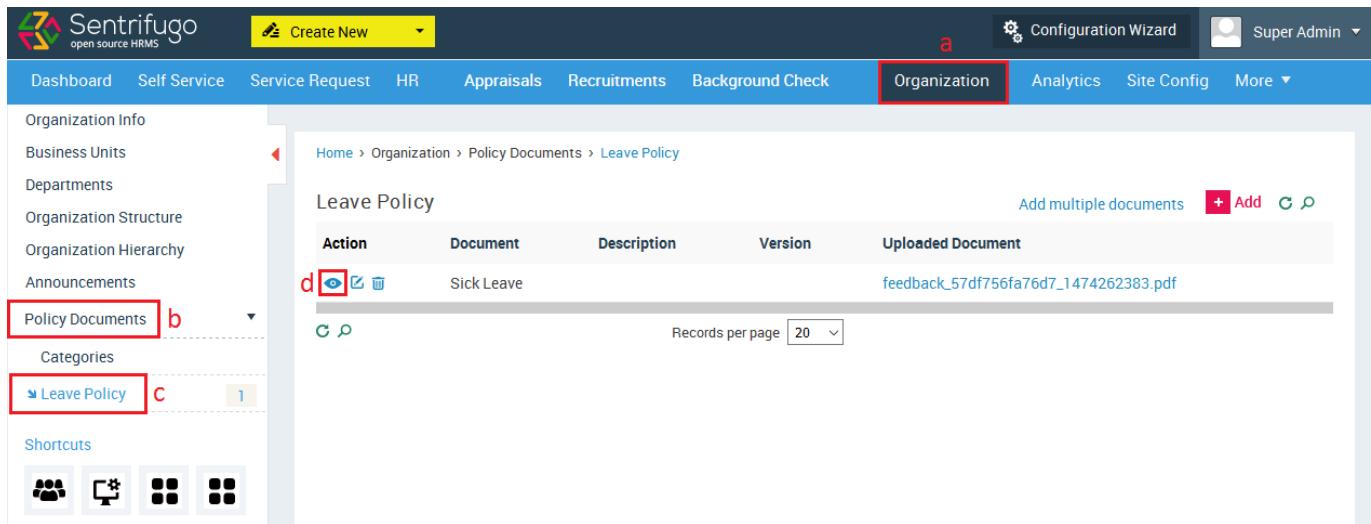


Figure 139

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



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

# 10. Analytics

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

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

## 10.1 How do I view/generate Reports?

*Please refer Figure 140*

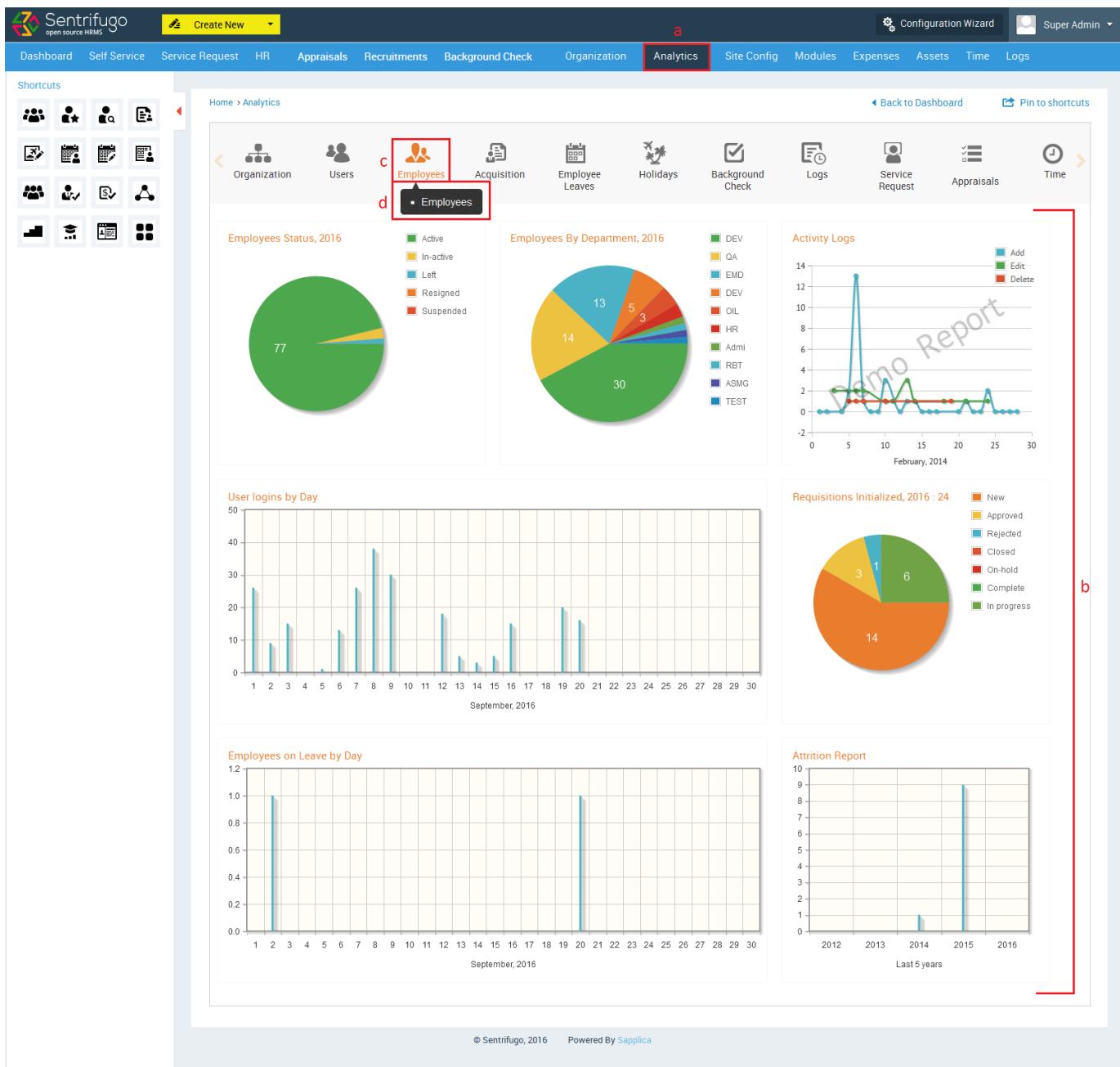
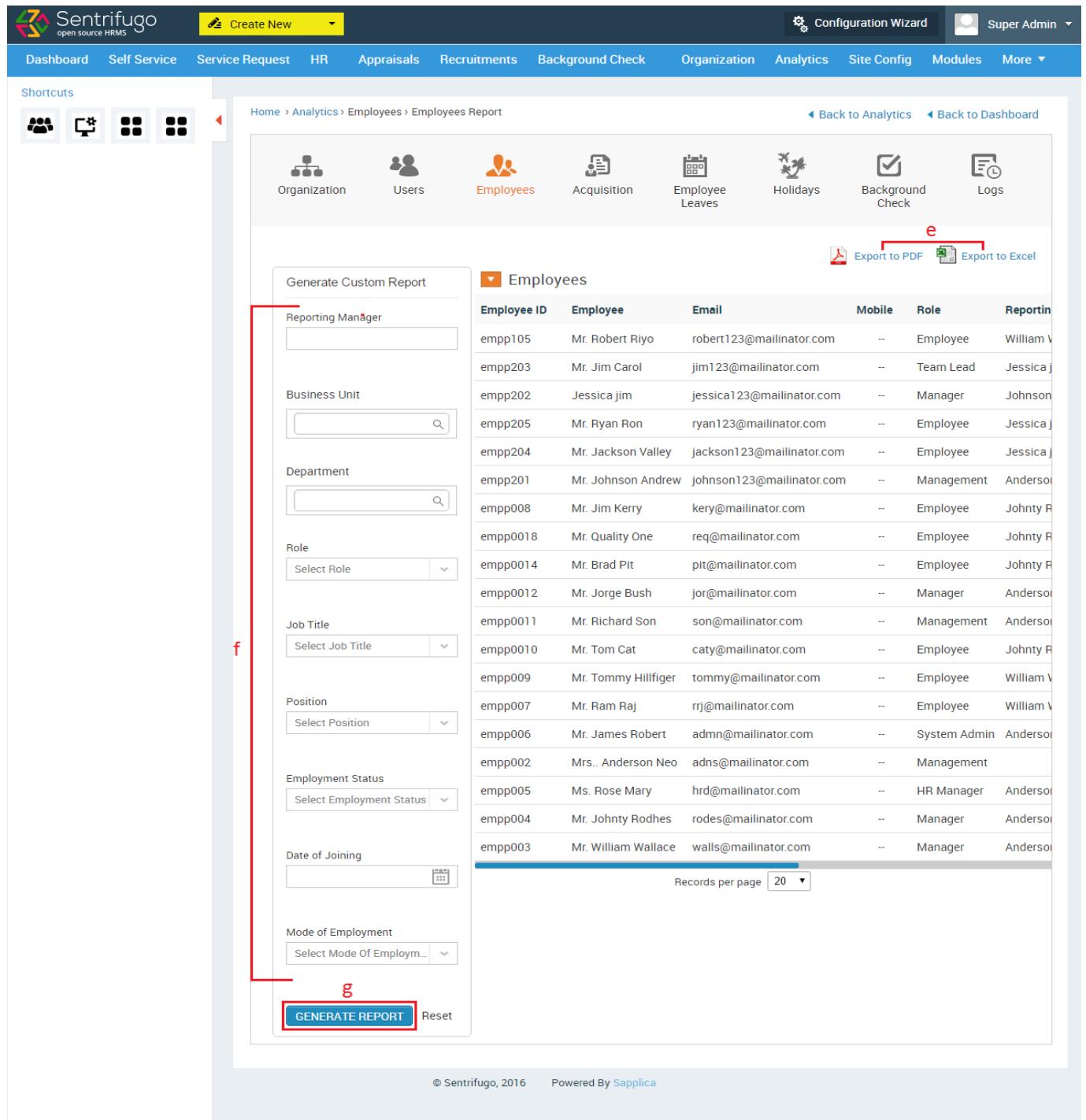


Figure 140

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

Please refer Figure 141



The screenshot shows the Sentrifugo HRMS interface. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. Below the navigation is a 'Shortcuts' bar with icons for Organization, Users, Employees (highlighted in orange), Acquisition, Employee Leaves, Holidays, Background Check, and Logs.

The main content area is titled 'Employees Report'. It features a 'Generate Custom Report' section on the left with dropdowns for Reporting Manager, Business Unit, Department, Role, Job Title, Position, Employment Status, Date of Joining, and Mode of Employment. A 'GENERATE REPORT' button is at the bottom of this section. To the right is a table titled 'Employees' with columns for Employee ID, Employee, Email, Mobile, Role, and Reporting Manager. The table contains 20 rows of sample employee data. At the bottom right of the table is a 'Records per page' dropdown set to 20.

Figure 141

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

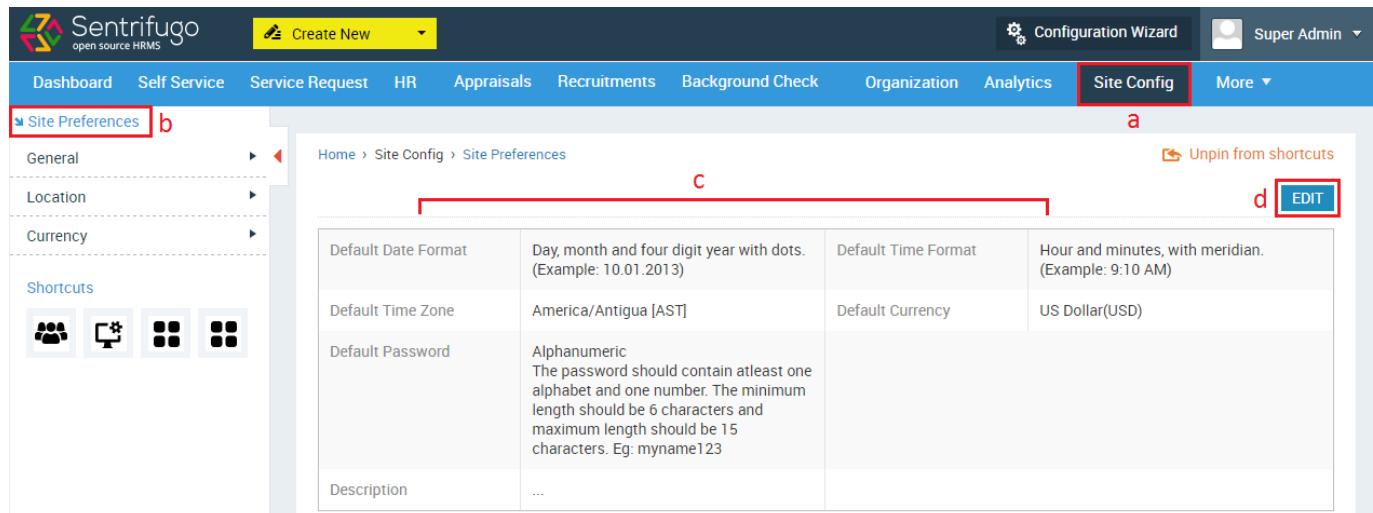
# 11. Site Config

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

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

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

*Please refer Figure 142*

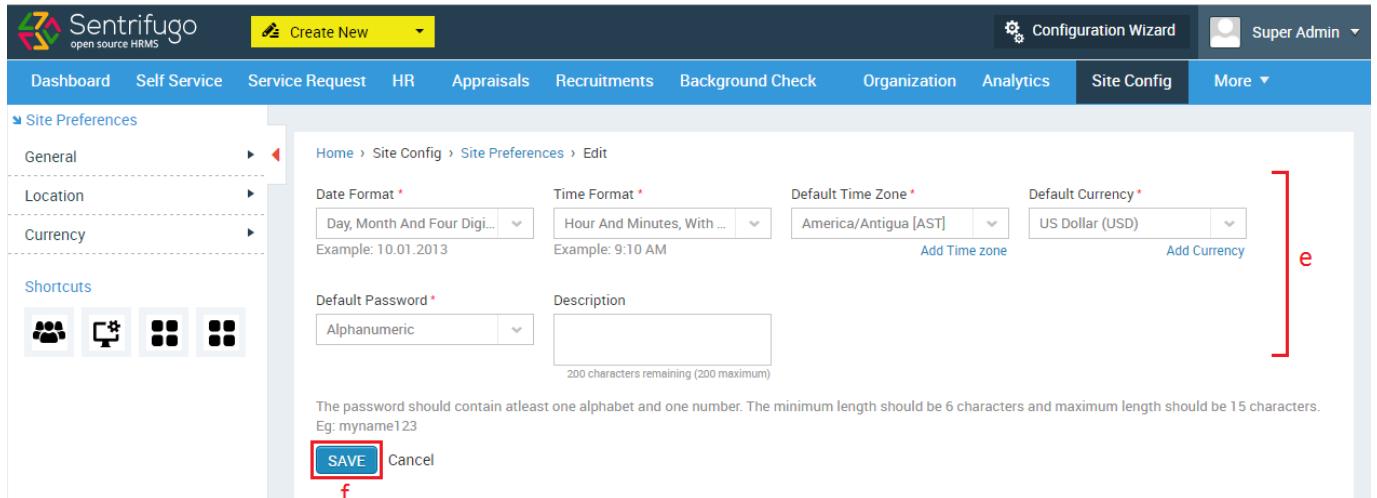


Default Date Format	Day, month and four digit year with dots. (Example: 10.01.2013)	Default Time Format	Hour and minutes, with meridian. (Example: 9:10 AM)
Default Time Zone	America/Antigua [AST]	Default Currency	US Dollar(USD)
Default Password	Alphanumeric The password should contain atleast one alphabet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

Figure 142

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

Please refer Figure 143



The screenshot shows the 'Site Preferences' section of the Sentrifugo application. On the left, there's a sidebar with 'General', 'Location', and 'Currency' sections. Below that is a 'Shortcuts' section with four icons. The main area shows the following configuration:

- Date Format \***: Day, Month And Four Digi... (dropdown menu)
- Time Format \***: Hour And Minutes, With ... (dropdown menu)
- Default Time Zone \***: America/Antigua [AST] (dropdown menu)
- Default Currency \***: US Dollar (USD) (dropdown menu)

Below these fields are 'Add Time zone' and 'Add Currency' buttons. A red bracket labeled 'e' points to the 'Default Currency' field. At the bottom, there's a note about password requirements: "The password should contain atleast one alphabet and one number. The minimum length should be 6 characters and maximum length should be 15 characters. Eg: myname123". Finally, there are 'SAVE' and 'Cancel' buttons, with a red box labeled 'f' pointing to the 'SAVE' button.

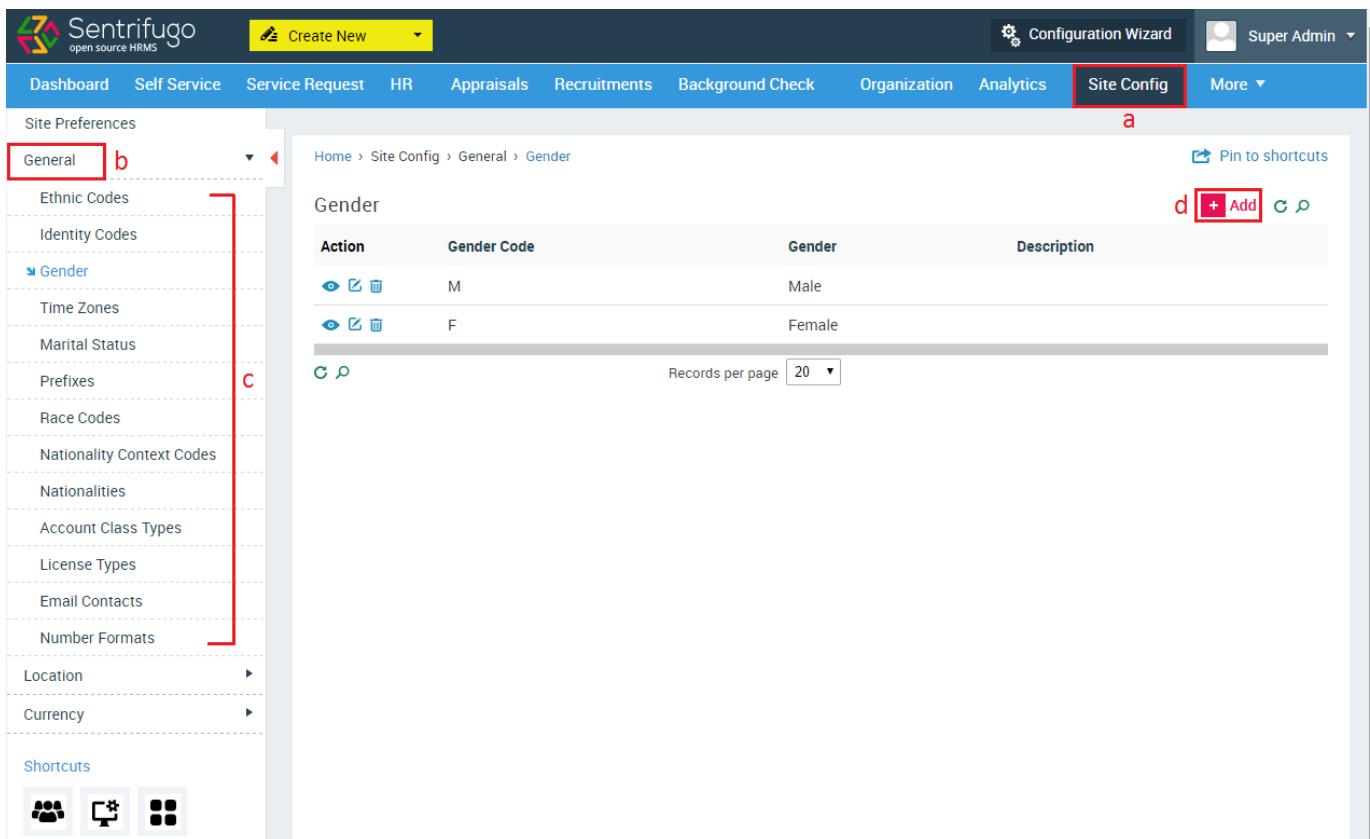
Figure 143

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

## 11.2 How do I set General Site Preferences?

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

Please refer Figure 144



Site Preferences

- General **b**
- Ethnic Codes
- Identity Codes
- Gender **c**
- Time Zones
- Marital Status
- Prefixes
- Race Codes
- Nationality Context Codes
- Nationalities
- Account Class Types
- License Types
- Email Contacts
- Number Formats
- Location
- Currency
- Shortcuts

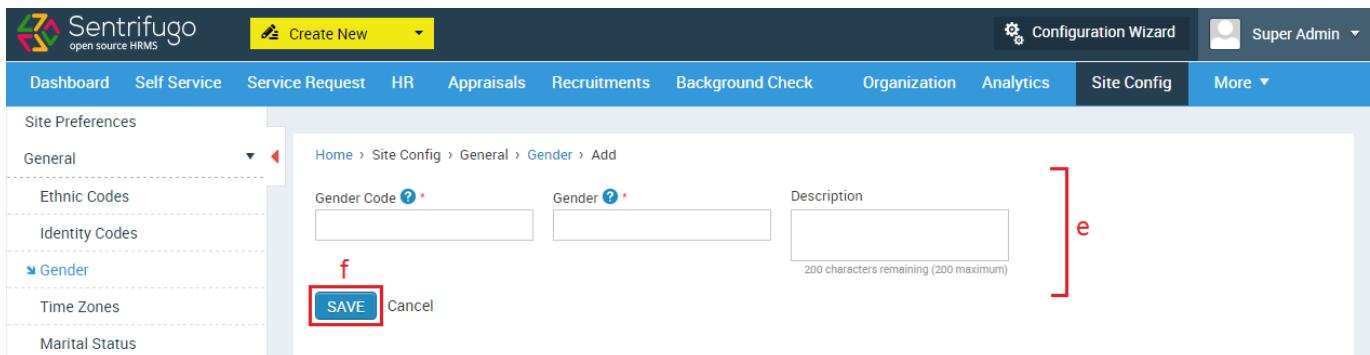
Action	Gender Code	Gender	Description
	M	Male	
	F	Female	

Records per page **e** 20

Figure 144

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

Please refer Figure 145



Site Preferences

- General

Gender Code <b>f</b>	Gender <b>f</b>	Description
<input type="text"/>	<input type="text"/>	<input type="text"/> 200 characters remaining (200 maximum)

**e**

SAVE Cancel

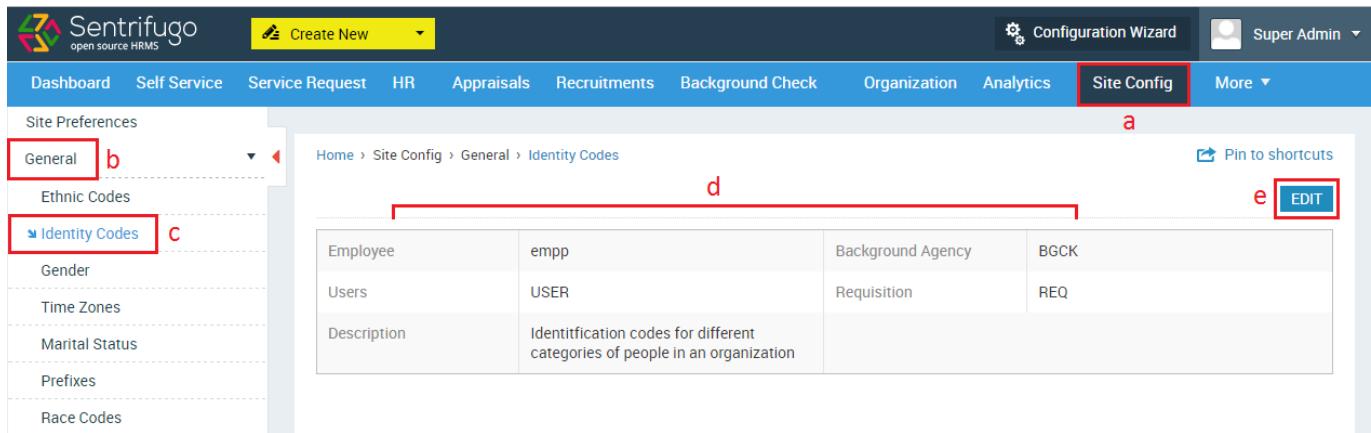
Figure 145

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

## 11.3 How do I set Identity Codes?

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

Please refer Figure 146



The screenshot shows the Sentrifugo interface with the following elements:

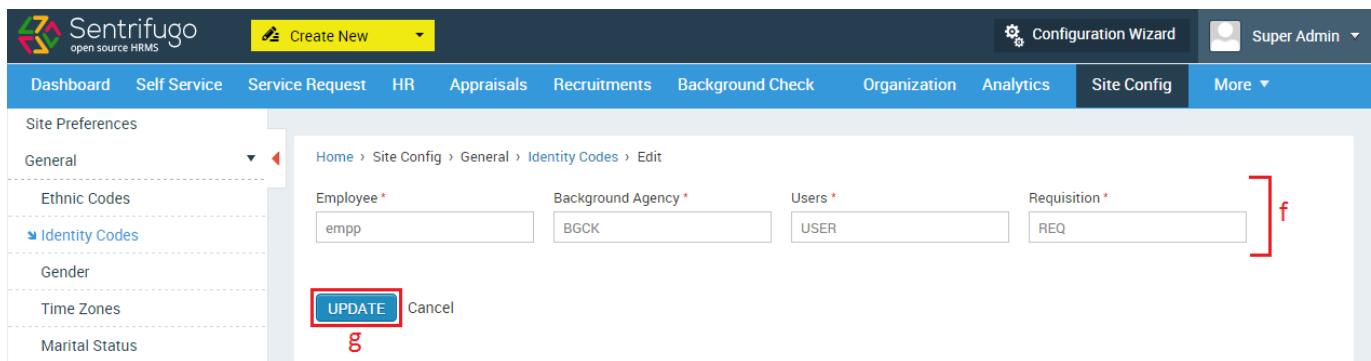
- Top Bar:** Sentrifugo logo, Create New button, Configuration Wizard, Super Admin dropdown.
- Top Menu:** Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (highlighted in red), More.
- Left Sidebar:** Site Preferences section with sub-options: General (highlighted in red, labeled 'a'), Ethnic Codes, Identity Codes (highlighted in red, labeled 'b'), Gender, Time Zones, Marital Status, Prefixes, Race Codes.
- Breadcrumb:** Home > Site Config > General > Identity Codes.
- Content Area:** A table showing identity code details:
 

Employee	empp	Background Agency	BGCK
Users	USER	Requisition	REQ
Description	Identification codes for different categories of people in an organization		
- Right Side:** Pin to shortcuts button, Edit icon (highlighted in red, labeled 'c').

Figure 146

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

Please refer Figure 147



The screenshot shows the Sentrifugo interface with the following elements:

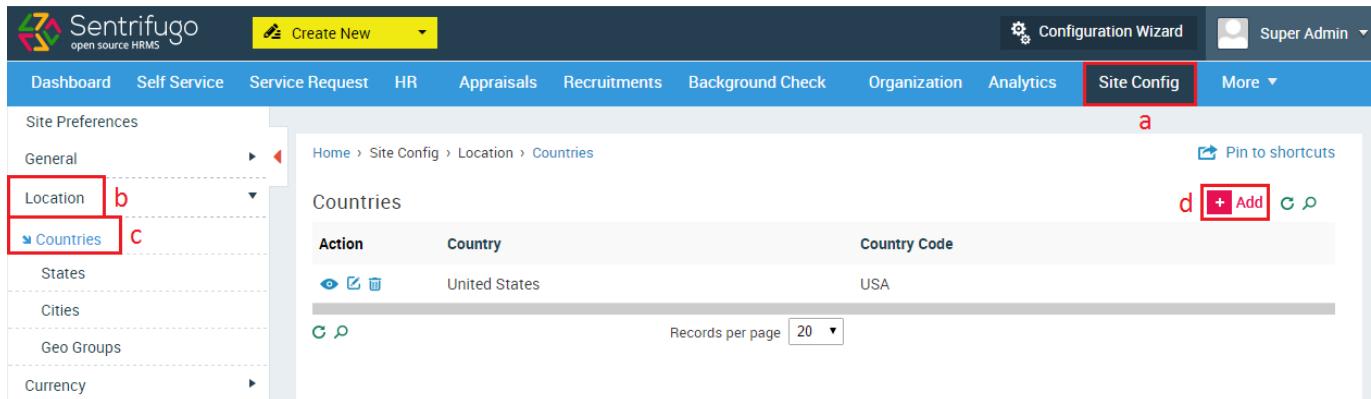
- Top Bar:** Sentrifugo logo, Create New button, Configuration Wizard, Super Admin dropdown.
- Top Menu:** Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (highlighted in red), More.
- Left Sidebar:** Site Preferences section with sub-options: General, Ethnic Codes, Identity Codes (highlighted in red), Gender, Time Zones, Marital Status.
- Breadcrumb:** Home > Site Config > General > Identity Codes > Edit.
- Form Fields:** Employee \* (empp), Background Agency \* (BGCK), Users \* (USER), Requisition \* (REQ).
- Buttons:** UPDATE (highlighted in red, labeled 'g'), Cancel.
- Right Side:** A large bracket labeled 'f' covers the form fields and buttons.

Figure 147

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

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

Please refer Figure 148



Action	Country	Country Code
	United States	USA

Figure 148

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

Please refer Figure 149

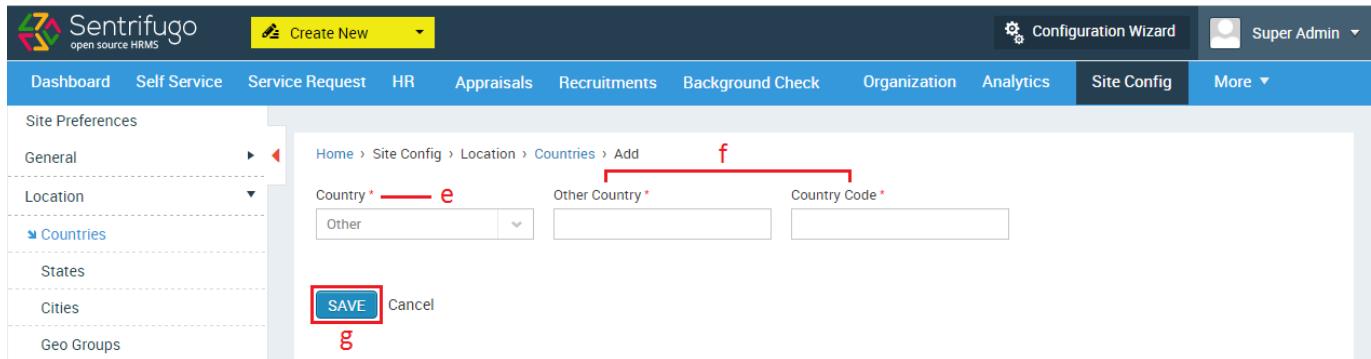


Figure 149

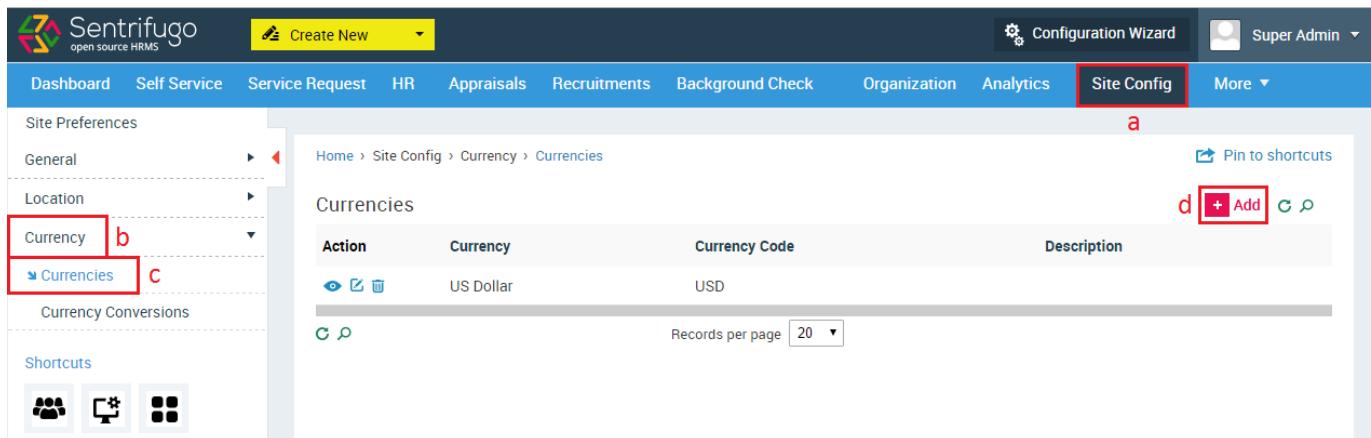
- Select 'Other' in the Country field
- Provide Other Country name and code
- Click **SAVE** button

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

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

### Currencies

Please refer Figure 150

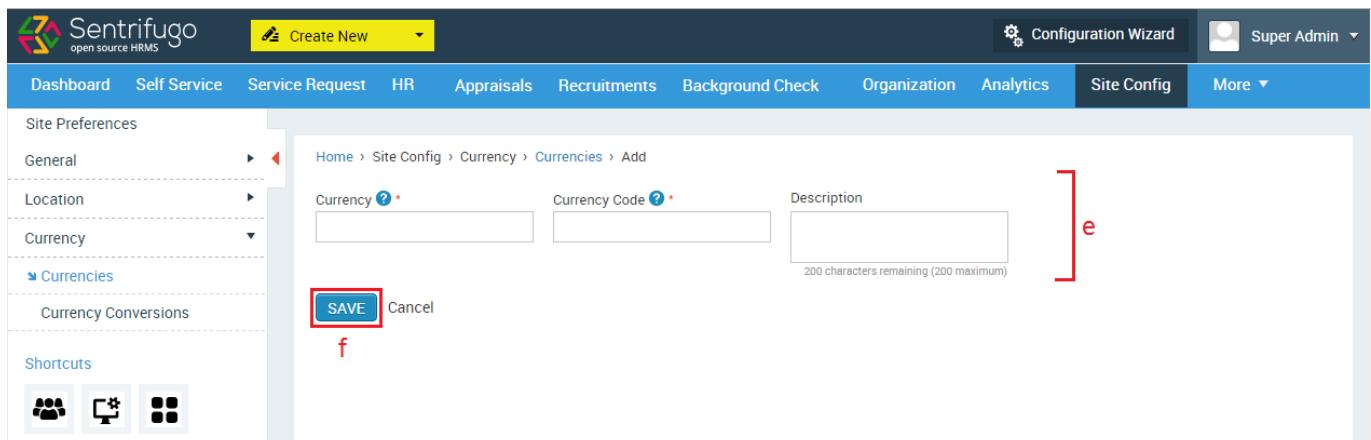


The screenshot shows the Sentrifugo application interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (which is highlighted with a red box 'a'), and More. On the left, a sidebar under 'Site Preferences' shows 'General', 'Location', 'Currency' (highlighted with a red box 'b'), 'Currencies' (highlighted with a red box 'c'), 'Currency Conversions', and 'Shortcuts'. The main content area shows a breadcrumb path 'Home > Site Config > Currency > Currencies'. It lists a single currency entry: Action (eye icon), Currency (US Dollar), Currency Code (USD). There are 'Pin to shortcuts' and '+ Add' buttons in the top right.

Figure 150

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

Please refer Figure 151



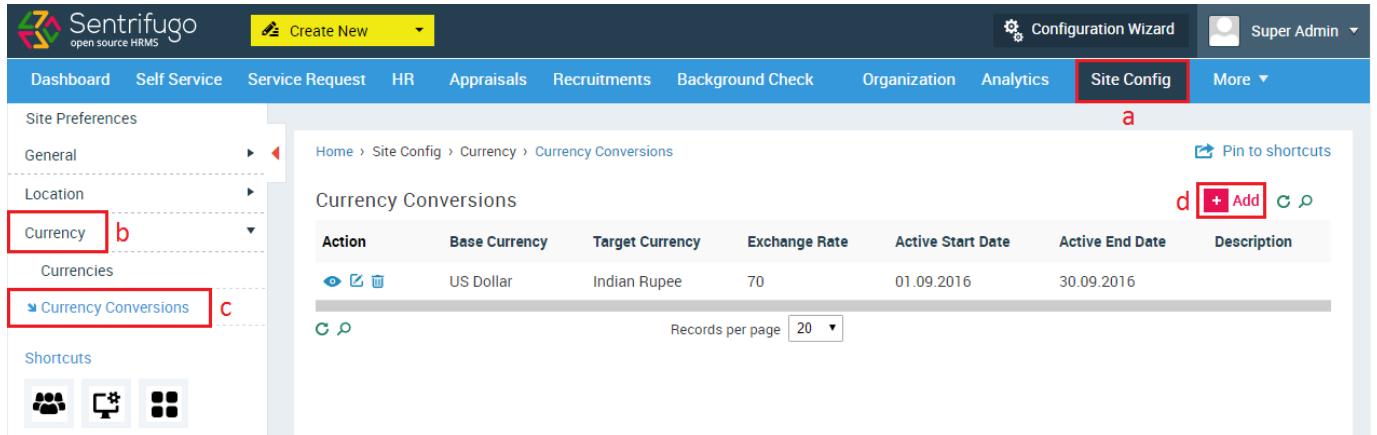
The screenshot shows the 'Add' form for a new currency. The left sidebar shows 'General', 'Location', 'Currency' (highlighted with a red box 'e'), 'Currencies', 'Currency Conversions', and 'Shortcuts'. The main form has fields for 'Currency' (with a red box 'e') and 'Currency Code' (both marked with required asterisks). A 'Description' text area is present with a note '200 characters remaining (200 maximum)'. At the bottom are 'SAVE' and 'Cancel' buttons, with the 'SAVE' button highlighted with a red box 'f'.

Figure 151

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

## Currency Conversions

Please refer Figure 152



Action	Base Currency	Target Currency	Exchange Rate	Active Start Date	Active End Date	Description
	US Dollar	Indian Rupee	70	01.09.2016	30.09.2016	

Figure 152

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

Please refer Figure 153

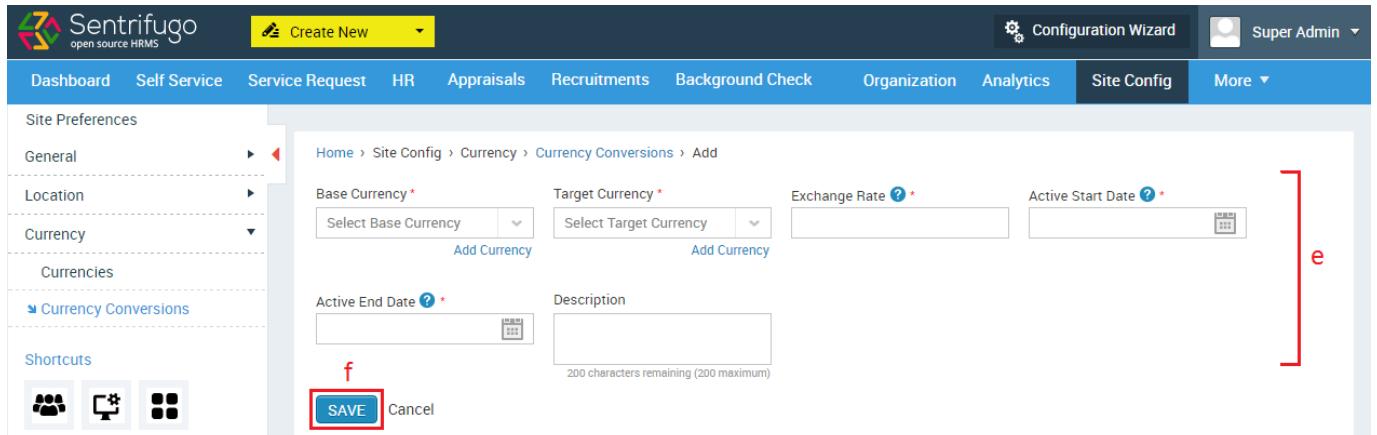


Figure 153

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

## 12. Modules

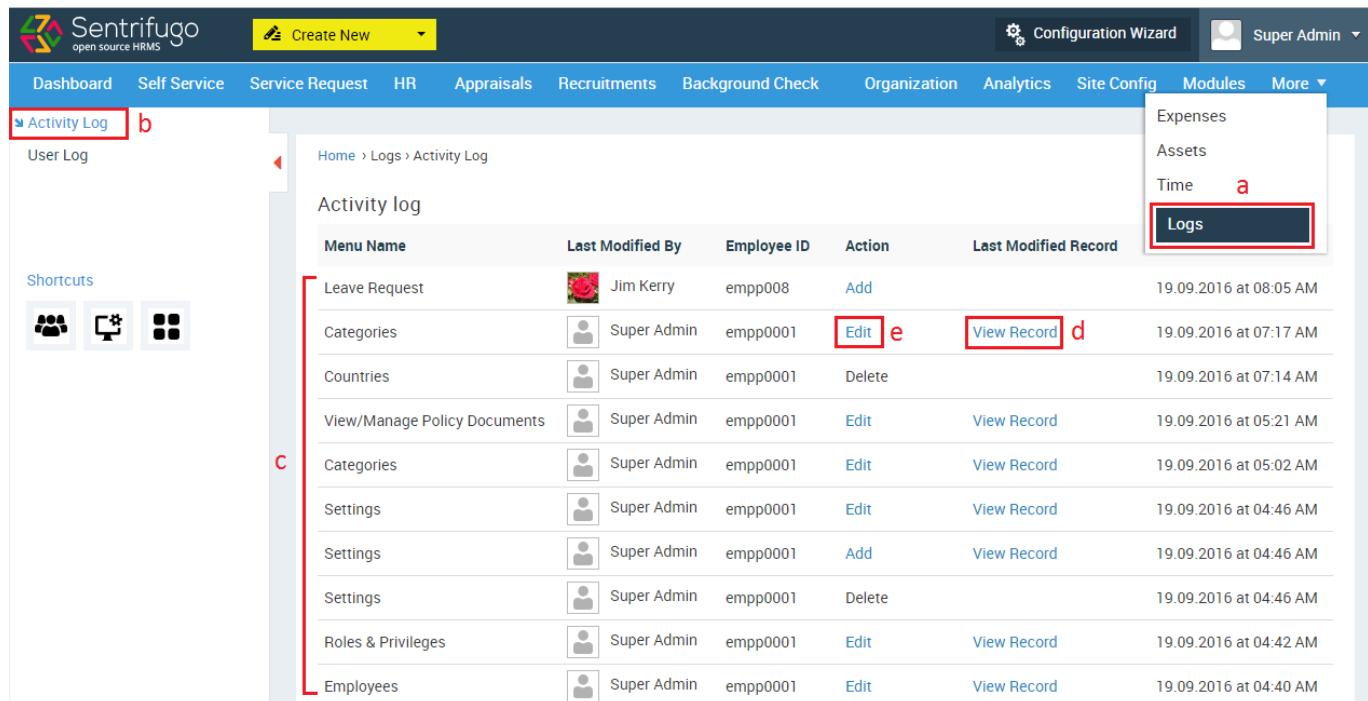
Please refer section [1.3.1 Configuration Wizard: Step 1](#)

## 13. Logs

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

### 13.1 How do I view Activity Logs?

Please refer Figure 154



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

Figure 154

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

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

**Categories - Edit**

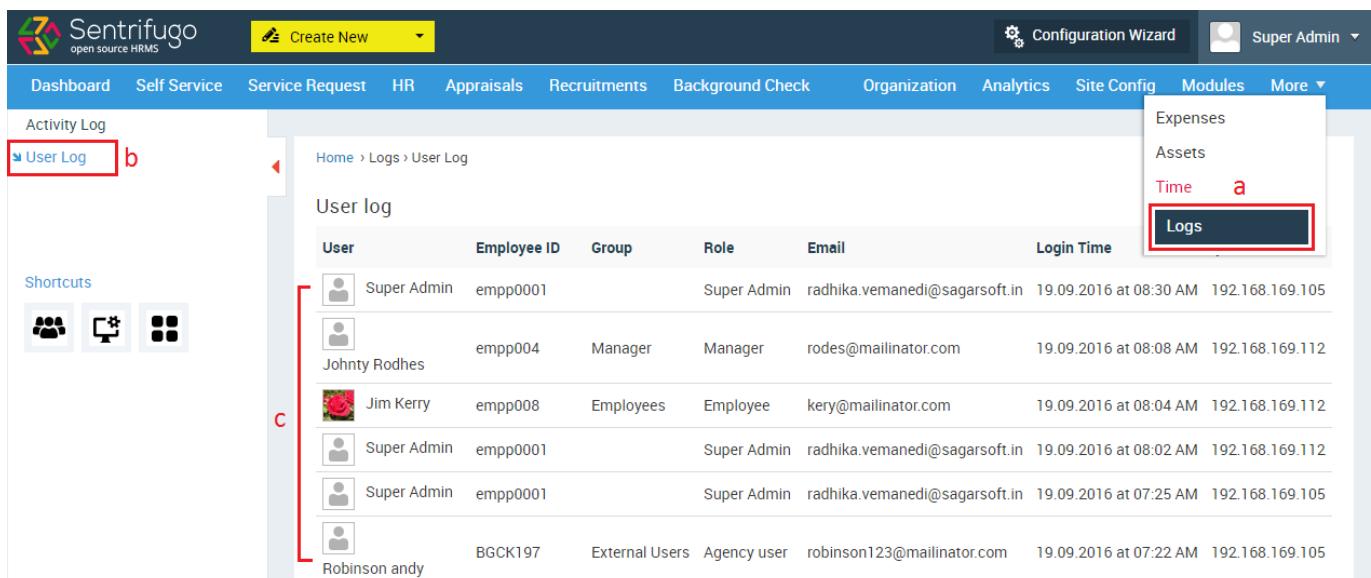
User	Employee ID	Date	Record
 Super Admin	empp0001	19.09.2016 at 07:17 AM	<a href="#">View Record</a>
Records per page <input type="text" value="20"/> ▾			

**CLOSE**

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

## 13.2 How do I view User Logs?

Please refer Figure 155



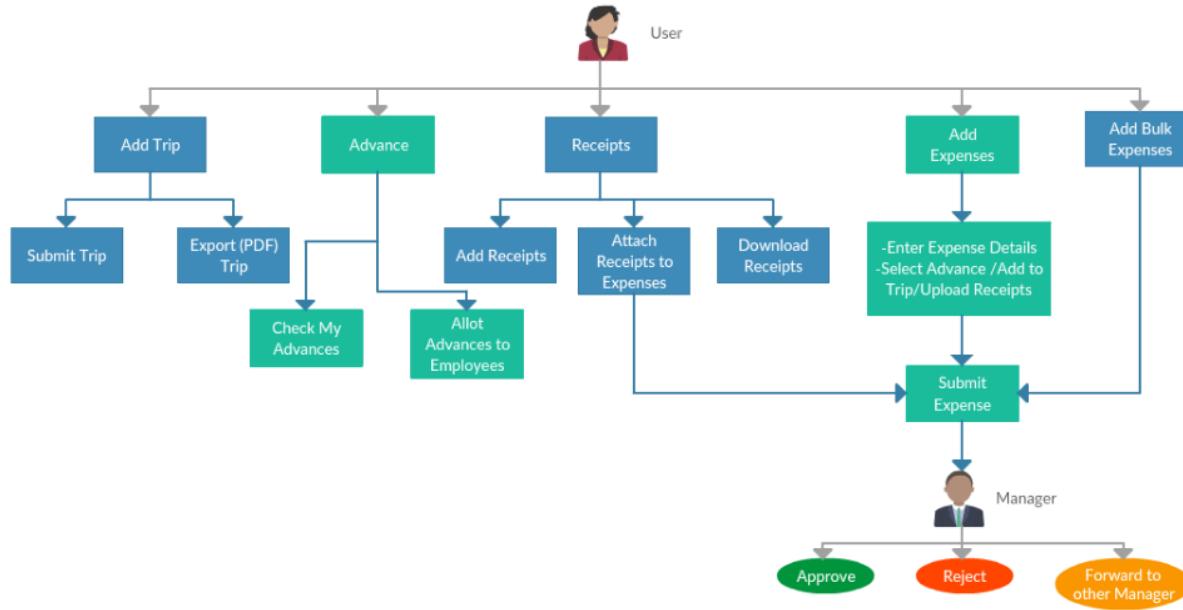
User	Employee ID	Group	Role	Email	Login Time
Super Admin	empp0001		Super Admin	radhika.vemanedi@sagarsoft.in	19.09.2016 at 08:30 AM 192.168.169.105
Johnty Rodhes	empp004	Manager	Manager	rodes@mailinator.com	19.09.2016 at 08:08 AM 192.168.169.112
Jim Kerry	empp008	Employees	Employee	kery@mailinator.com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

Figure 155

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

## 14. Expenses

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



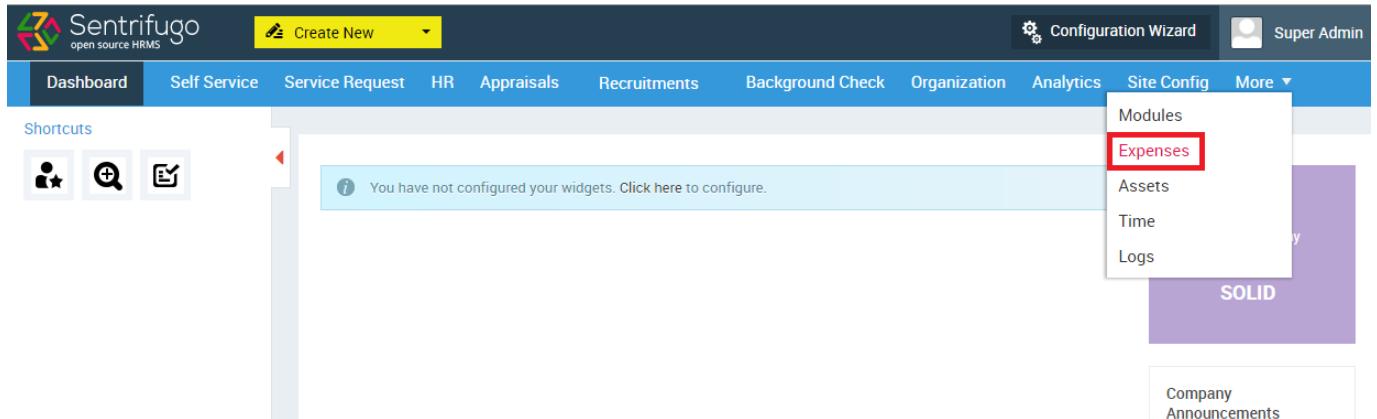
### Process Description:

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

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

## 14.1 How do I add an Expense Category?

Please refer Figure 156

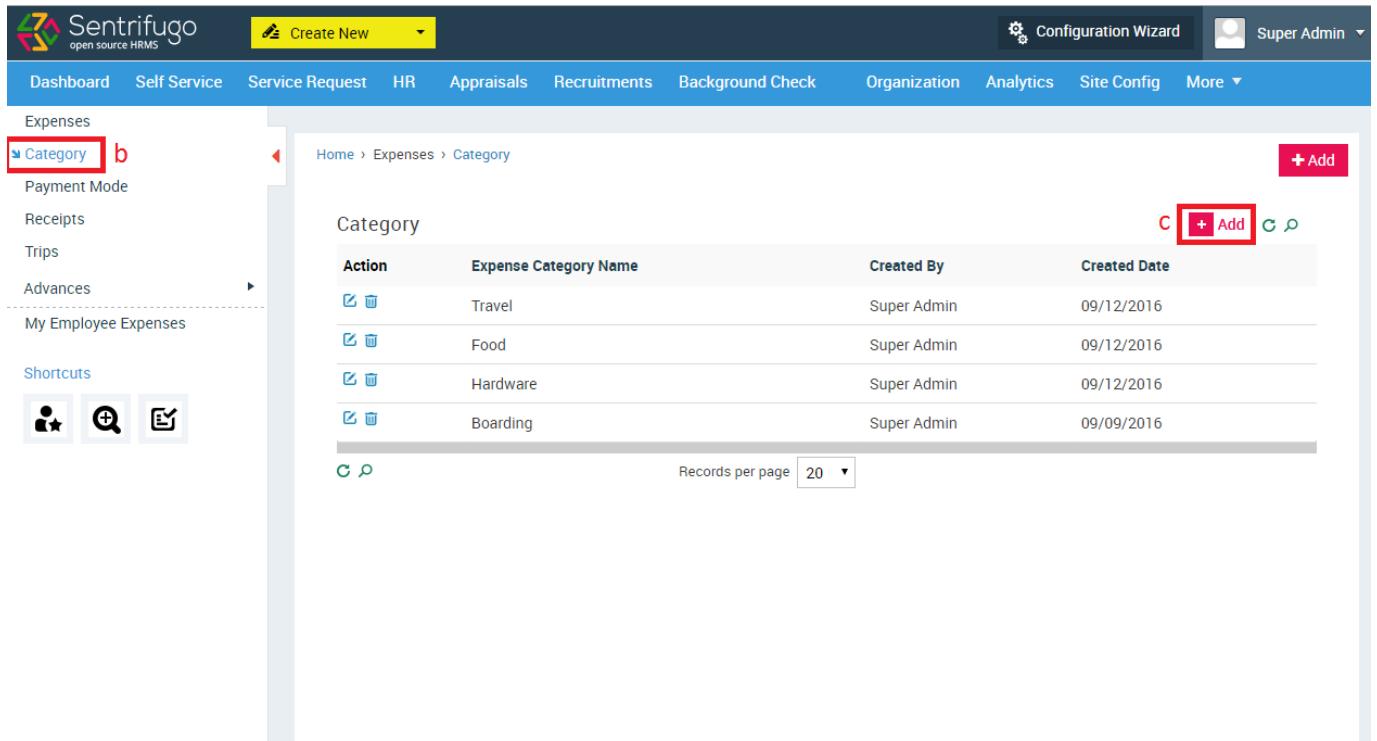


The screenshot shows the Sentrifugo HRMS dashboard. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A 'Create New' button is also present. On the right side, there is a 'Configuration Wizard' and a 'Super Admin' dropdown. A 'More' menu is open, showing options like Modules, Expenses (which is highlighted with a red box), Assets, Time, and Logs. Below the dashboard, there is a message: 'You have not configured your widgets. Click here to configure.' To the right, there is a sidebar with 'Company Announcements' and a purple 'SOLID' section.

Figure 156

- Click **Expenses** in the top menu

Please refer Figure 157



The screenshot shows the 'Expenses' module in Sentrifugo. On the left, there is a sidebar with links for Category (highlighted with a red box), Payment Mode, Receipts, Trips, Advances, and My Employee Expenses. Below this is a 'Shortcuts' section with icons. The main area shows a breadcrumb path: Home > Expenses > Category. There is a '+ Add' button. A table lists expense categories with columns for Action, Expense Category Name, Created By, and Created Date. The table includes rows for Travel, Food, Hardware, and Boarding. At the bottom, there are buttons for search and records per page (set to 20).

Action	Expense Category Name	Created By	Created Date
[Edit]	Travel	Super Admin	09/12/2016
[Edit]	Food	Super Admin	09/12/2016
[Edit]	Hardware	Super Admin	09/12/2016
[Edit]	Boarding	Super Admin	09/09/2016

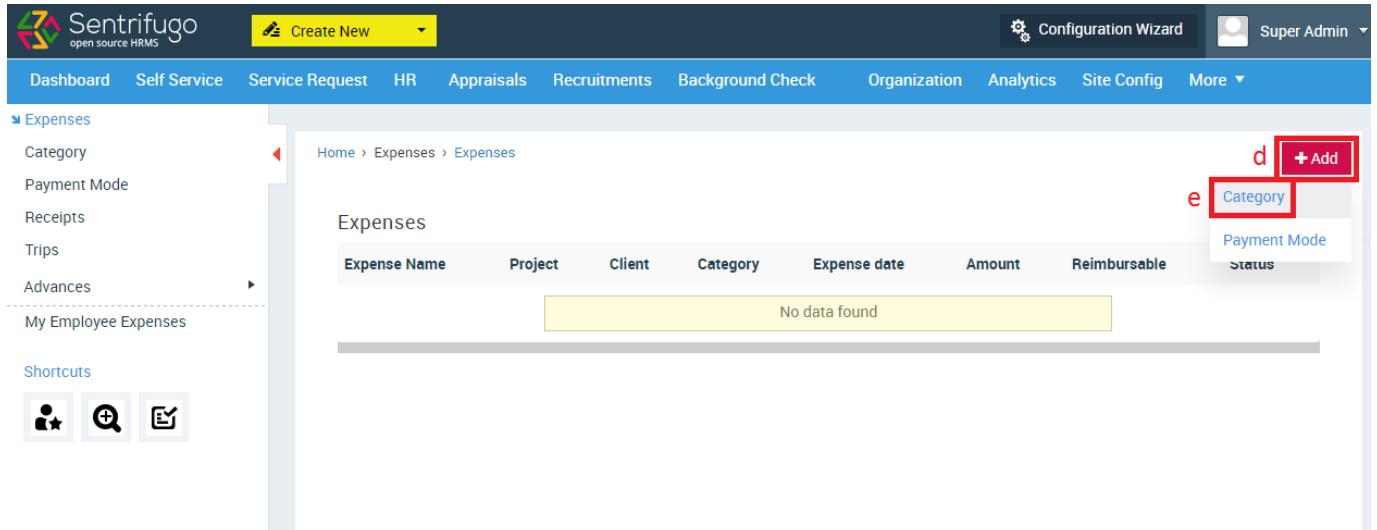
Figure 157

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

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

Or

Please refer Figure 158

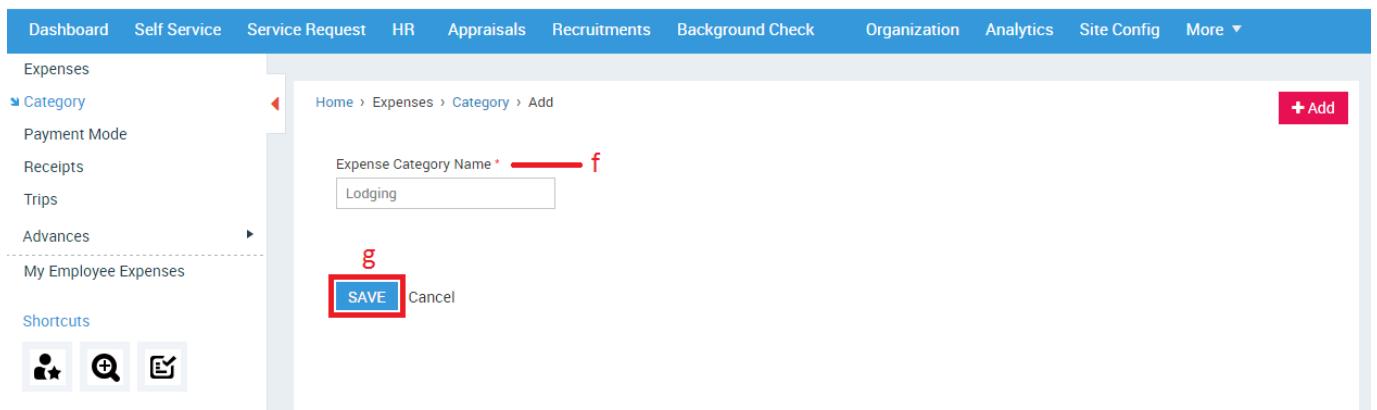


The screenshot shows the Sentrifugo web interface for managing expenses. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A 'Create New' button is visible in the top left. On the left, a sidebar menu lists Expenses, Category, Payment Mode, Receipts, Trips, Advances, and My Employee Expenses. Under 'Shortcuts', there are icons for user profile, search, and export. The main content area displays a table titled 'Expenses' with columns for Expense Name, Project, Client, Category, Expense date, Amount, and Reimbursable. A message 'No data found' is shown below the table. To the right of the table, there are buttons for '+Add' (labeled 'd'), 'Category' (labeled 'e'), 'Payment Mode', and 'Status'. The 'Category' button is highlighted with a red box.

Figure 158

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

Please refer Figure 159



The screenshot shows the 'Category' creation page within the Sentrifugo interface. The top navigation bar is identical to Figure 158. The left sidebar shows Expenses, Category (which is selected and highlighted in blue), Payment Mode, Receipts, Trips, Advances, and My Employee Expenses. The main content area shows a form with a field labeled 'Expense Category Name \*' containing the value 'Lodging'. Below the field are two buttons: 'SAVE' (highlighted with a red box) and 'Cancel'. The 'SAVE' button is labeled 'g'.

Figure 159

- f. Enter Category name  
g. Click **SAVE** button

## 14.2 How do I add a Payment Mode?

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

Please refer Figure 160

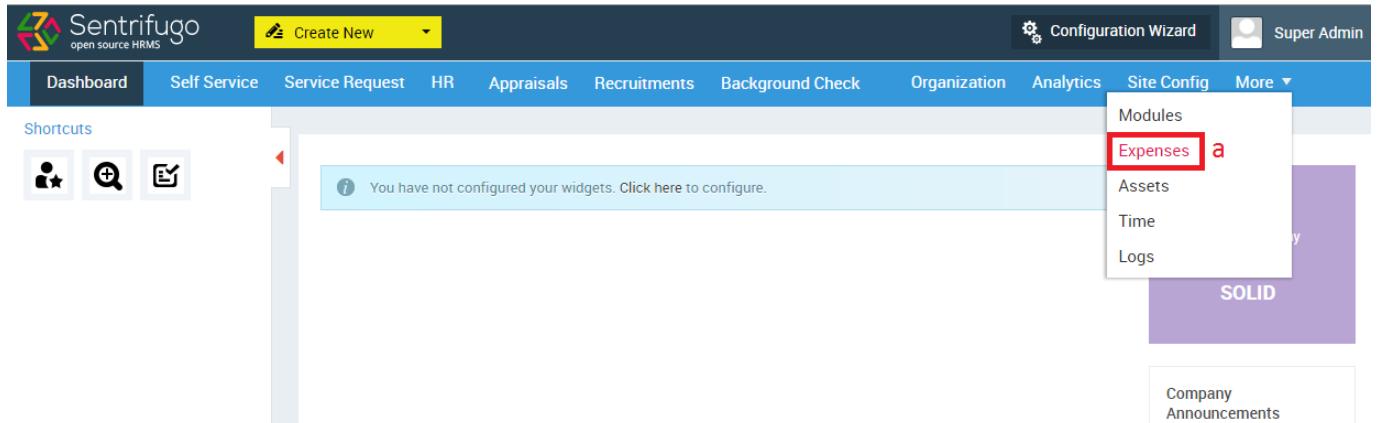


Figure 160

- Click **Expenses** in the top menu

Please refer Figure 161

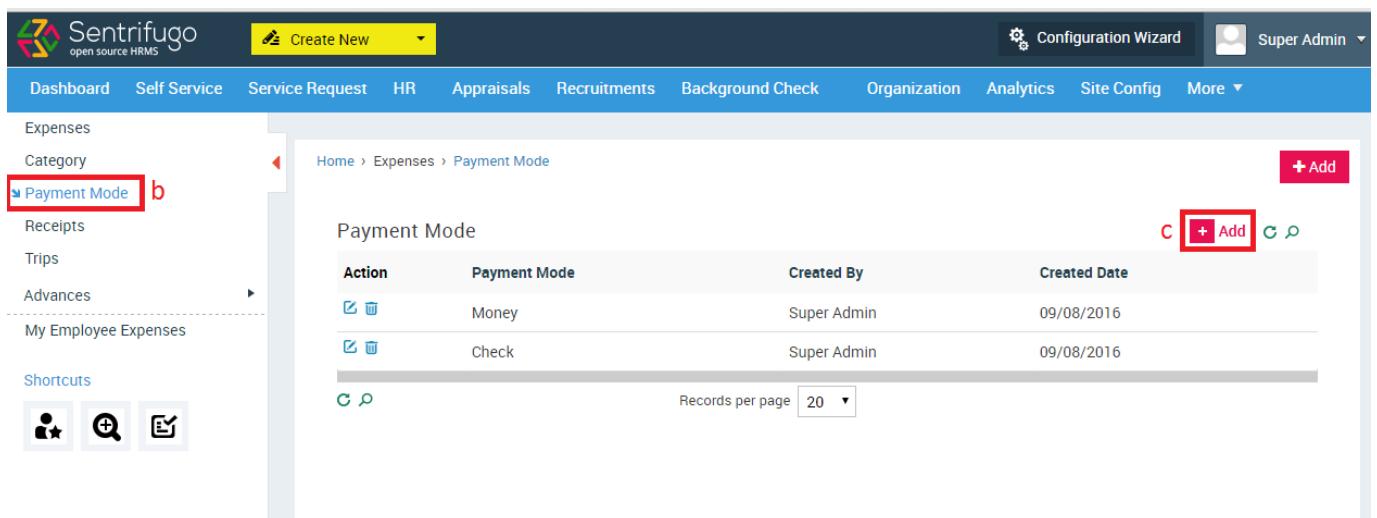
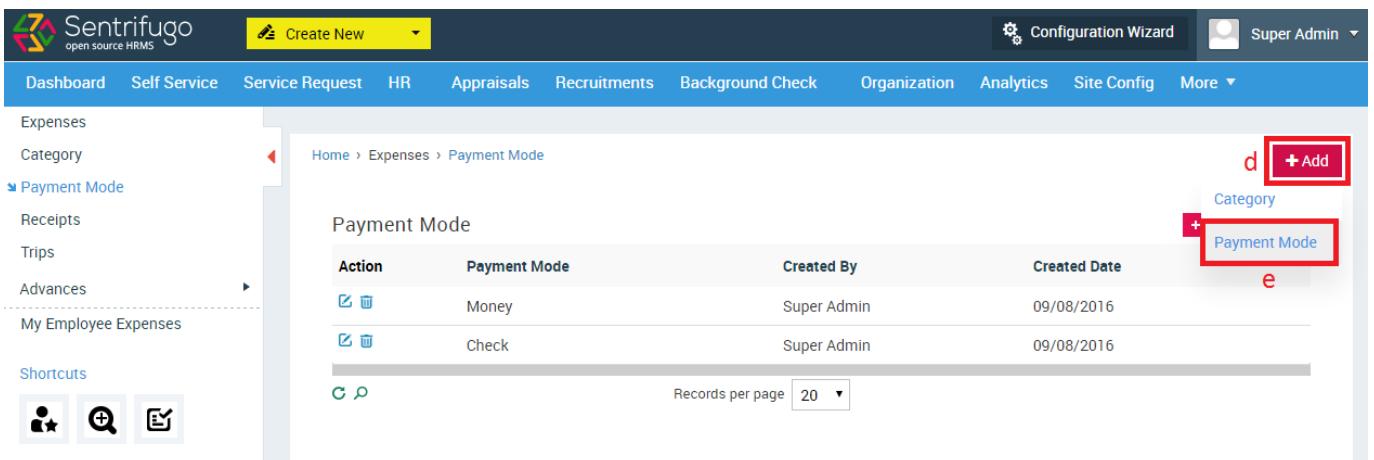


Figure 161

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

Or

Please refer Figure 162



Action	Payment Mode	Created By	Created Date
	Money	Super Admin	09/08/2016
	Check	Super Admin	09/08/2016

Figure 162

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

Please refer Figure 163

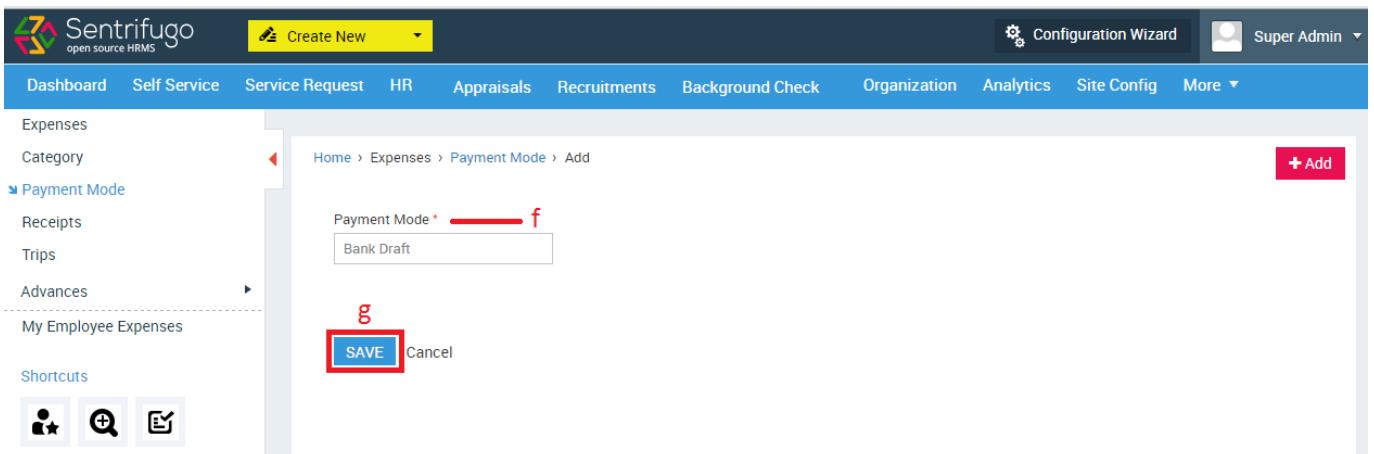


Figure 163

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

### 14.3 How do I add an Expense?

Please refer Figure 164

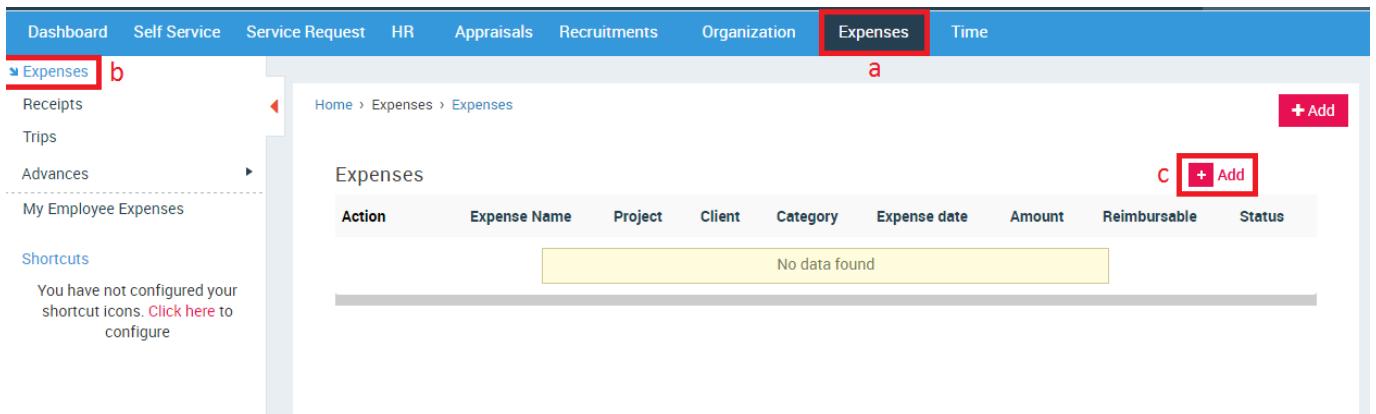


Figure 164

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

Please refer Figure 165

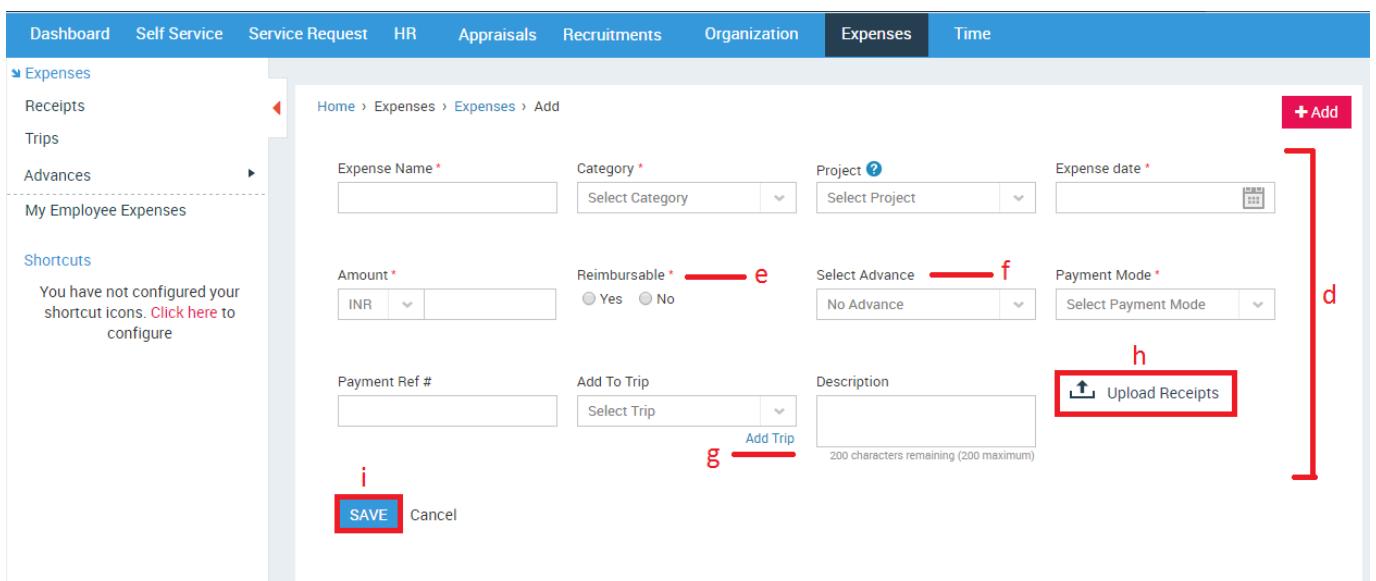


Figure 165

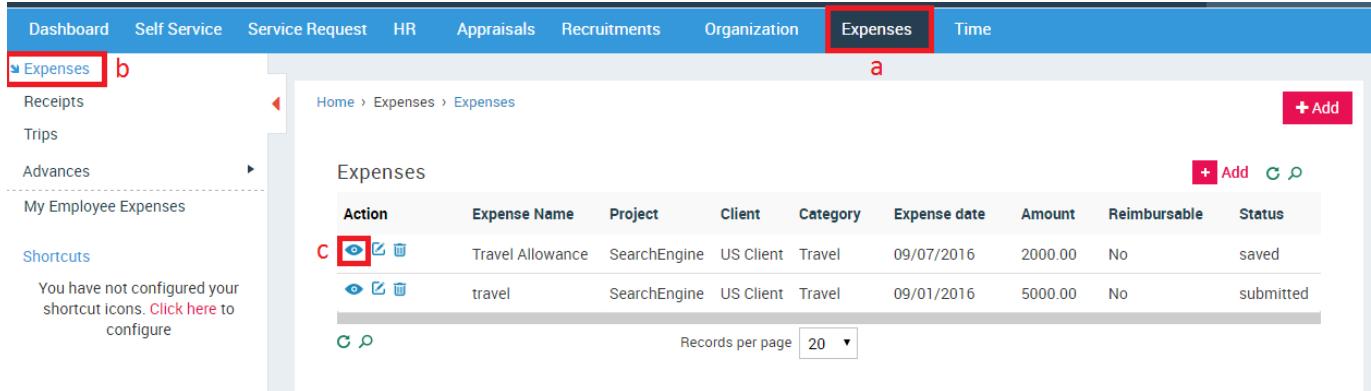
- Enter the required details
- Not functional in the current version
- Employers can pre-allocate a certain amount of money called **Advance** to an employee, which can be used for expenses incurred during trip(s) or for project(s) and client(s).
- Add Trips for managing multiple expenses, clients and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

- i. Click **SAVE** button

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

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

*Please refer Figure 166*

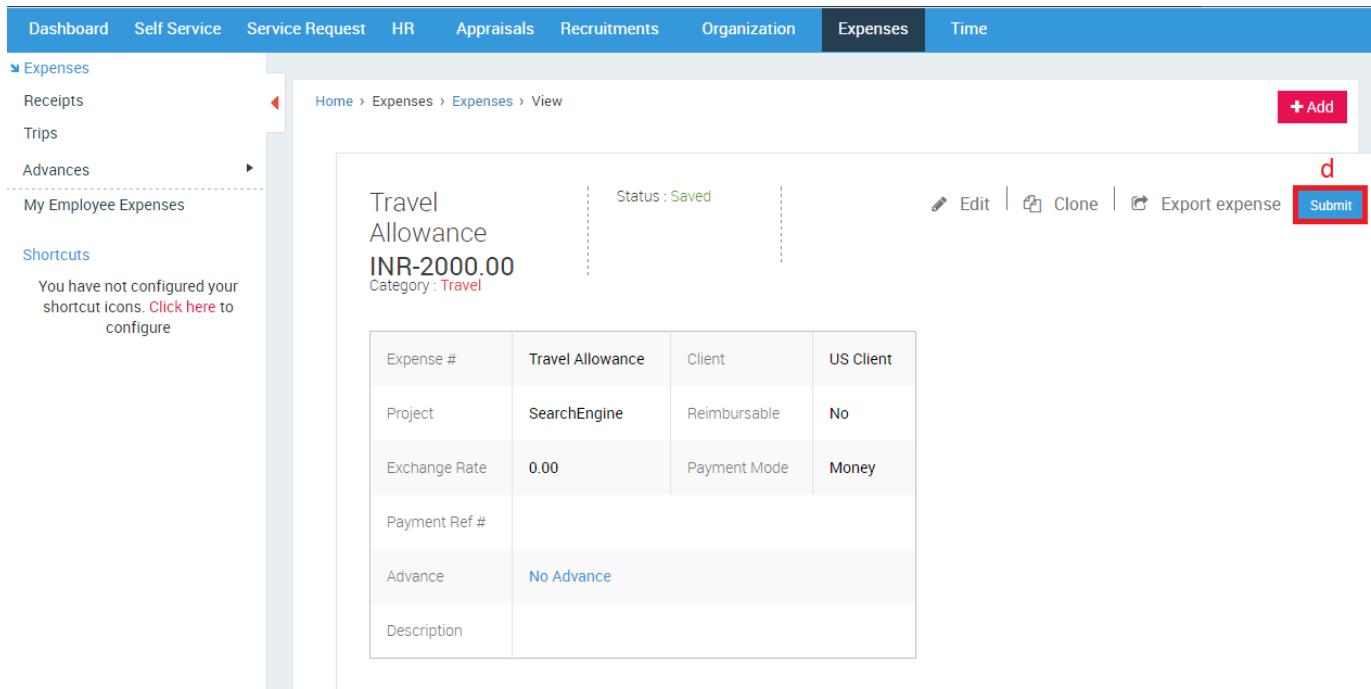


The screenshot shows the Sentrifugo web interface. The top navigation bar has tabs: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (which is highlighted with a red box), and Time. On the left, there's a sidebar with links: Receipts, Trips, Advances, My Employee Expenses, and Shortcuts (with a note about unconfigured icons). The main content area shows a list of expenses under the heading 'Expenses'. Each expense row includes columns for Action (with icons for View, Edit, and Delete), Expense Name, Project, Client, Category, Expense date, Amount, Reimbursable, and Status. Two entries are listed: 'Travel Allowance' (Status: saved) and 'travel' (Status: submitted). At the bottom right of the list, there are buttons for '+ Add' and 'C P'. Below the list, there's a 'Records per page' dropdown set to 20.

Figure 166

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

*Please refer Figure 167*



This screenshot shows the details of a specific expense record. The top navigation bar and sidebar are identical to Figure 166. The main content area displays a single expense entry titled 'Travel Allowance' with a value of 'INR-2000.00'. It is categorized as 'Travel'. The status is shown as 'Saved'. On the right, there are buttons for 'Edit', 'Clone', 'Export expense', and a red-bordered 'Submit' button. Below the title, there's a table with expense details: Expense # (Travel Allowance), Client (US Client), Project (SearchEngine), Reimbursable (No), Exchange Rate (0.00), Payment Mode (Money), Payment Ref #, Advance (No Advance), and Description. The 'Submit' button is highlighted with a red box.

Figure 167

- d. Click **Submit** button

A confirmation message will be displayed.

*Please refer Figure 168*

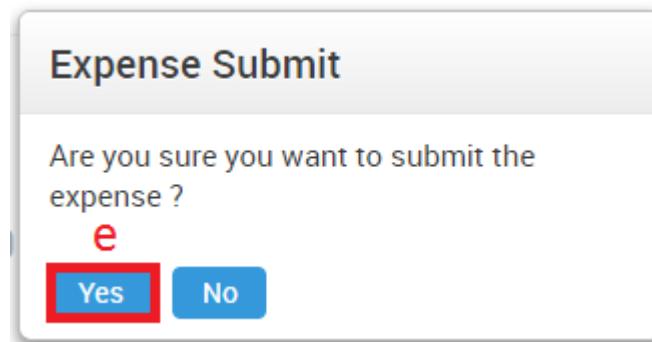


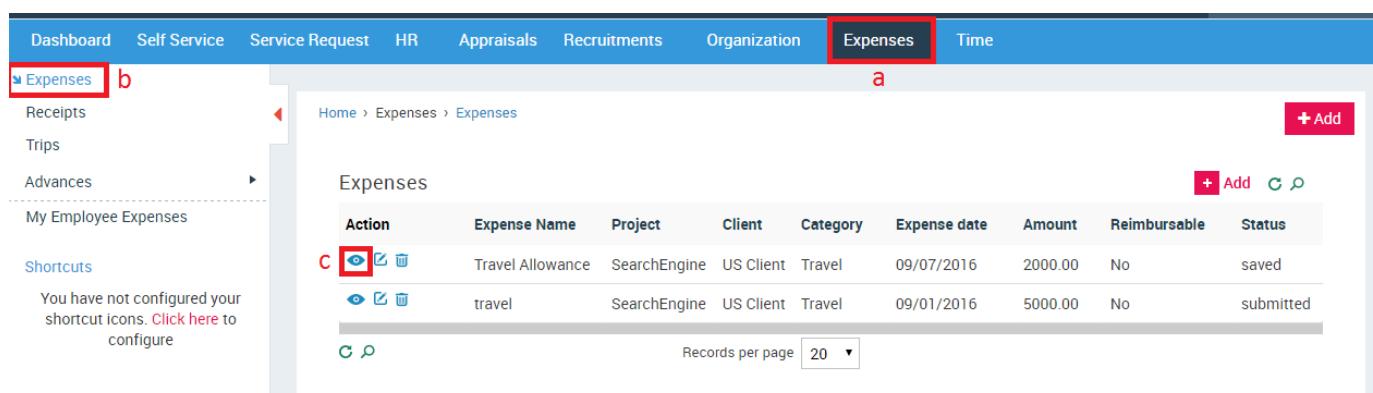
Figure 168

- e. Click **Yes**

## 14.5 How do I export an Expense?

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

*Please refer Figure 169*



The screenshot shows the Sentrifugo interface for managing expenses. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (which is highlighted with a red box), and Time. A left sidebar panel (b) contains links for Receipts, Trips, Advances, and My Employee Expenses. The main content area (a) displays a list of expenses with columns for Action, Expense Name, Project, Client, Category, Expense date, Amount, Reimbursable, and Status. Two entries are shown: 'Travel Allowance' and 'travel'. The 'Actions' column for the first entry contains icons for View, Edit, and Delete. A red box highlights the 'View' icon for the first row. Other icons in the Actions column include a magnifying glass and a refresh symbol. The status for the first entry is 'saved'. The second entry has a status of 'submitted'. Navigation links at the top of the main area include Home, Expenses, and a search bar. A red box highlights the 'Add' button in the top right corner of the main area. A note in the sidebar states: 'You have not configured your shortcut icons. Click here to configure'.

Figure 169

- Click **Expenses** in the top menu
- Click **Expenses** in the left panel
- Click **View** button in the action column

Please refer Figure 170

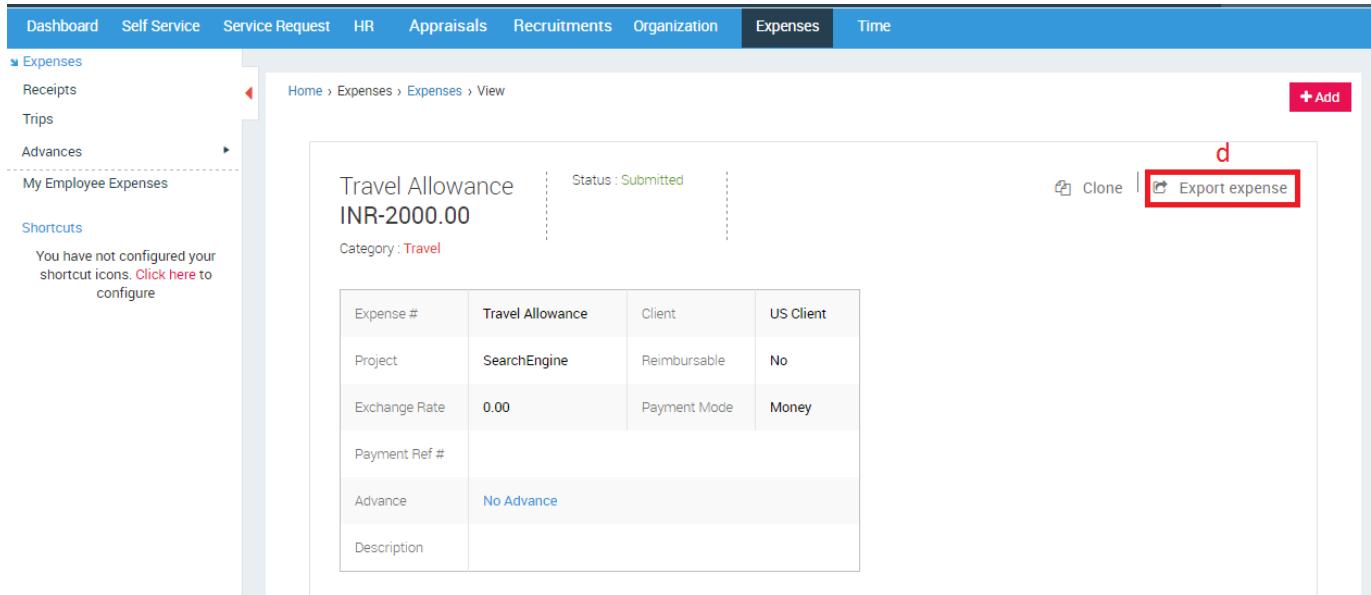


Figure 170

- Click Export expense button

An expense report in PDF format will be downloaded.

## 14.6 How do I clone an Expense?

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

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

Please refer Figure 171

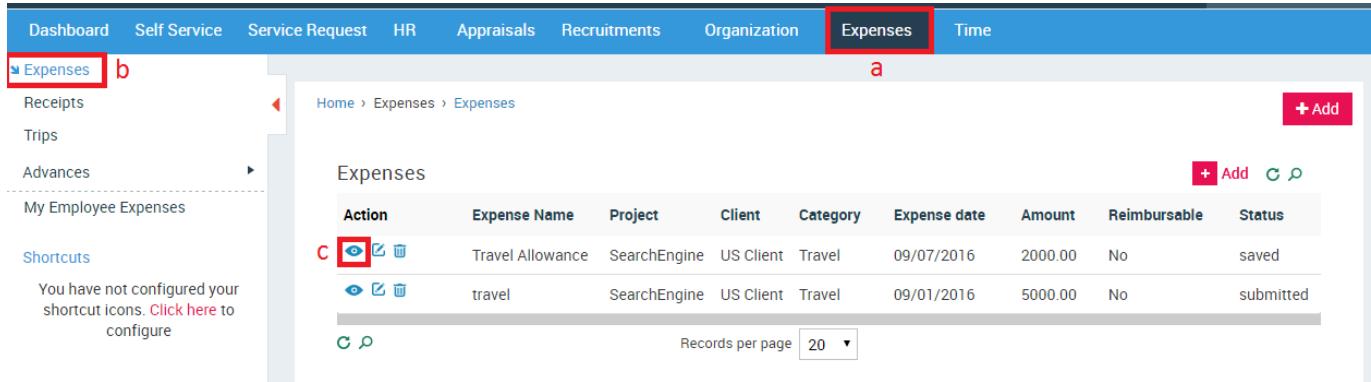
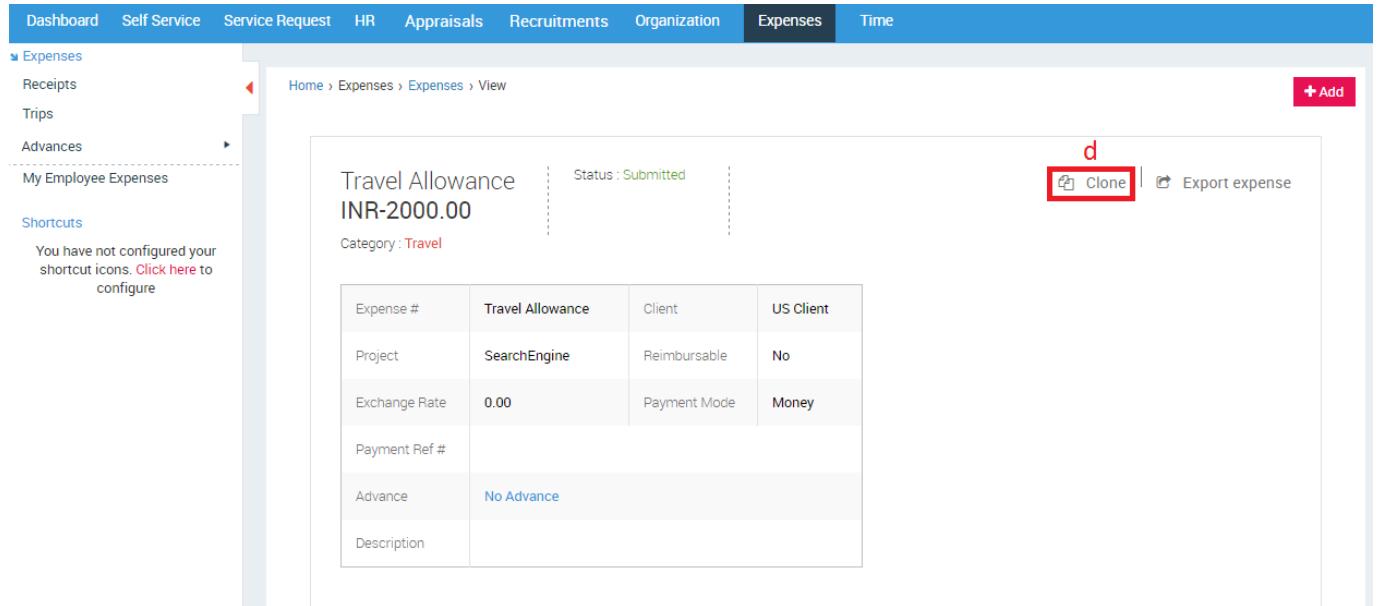


Figure 171

- Click Expenses in the top menu
- Click Expenses on the left menu panel

- c. Click **View** button in the action column

*Please refer Figure 172*



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (which is selected and highlighted in blue), and Time. On the left, a sidebar menu lists Receipts, Trips, Advances, and My Employee Expenses. A 'Shortcuts' section contains a note about未配置的快捷图标 and a link to configure them. The main content area displays an expense detail for 'Travel Allowance INR-2000.00'. The status is 'Submitted'. The category is 'Travel'. Below this is a table with the following data:

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

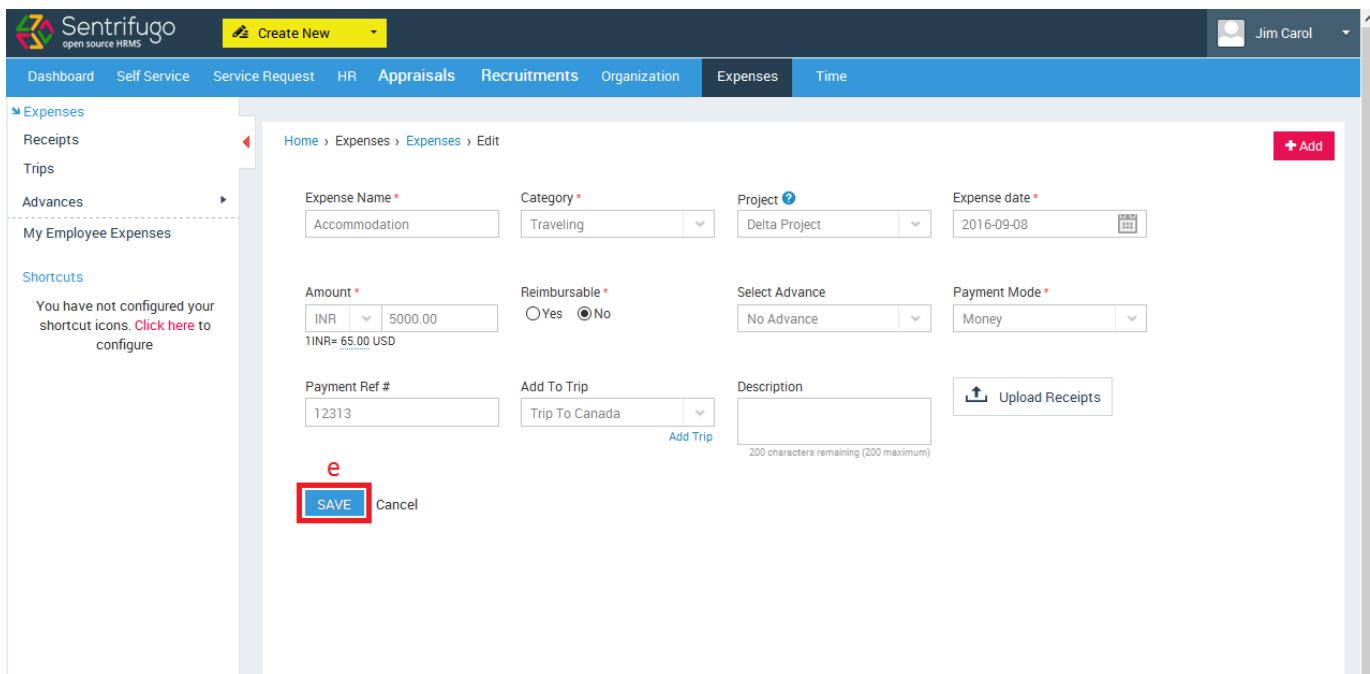
On the right side of the expense detail, there are buttons for 'Clone' (highlighted with a red box) and 'Export expense'.

Figure 172

- d. Click **Clone** option

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

*Please refer Figure 173*



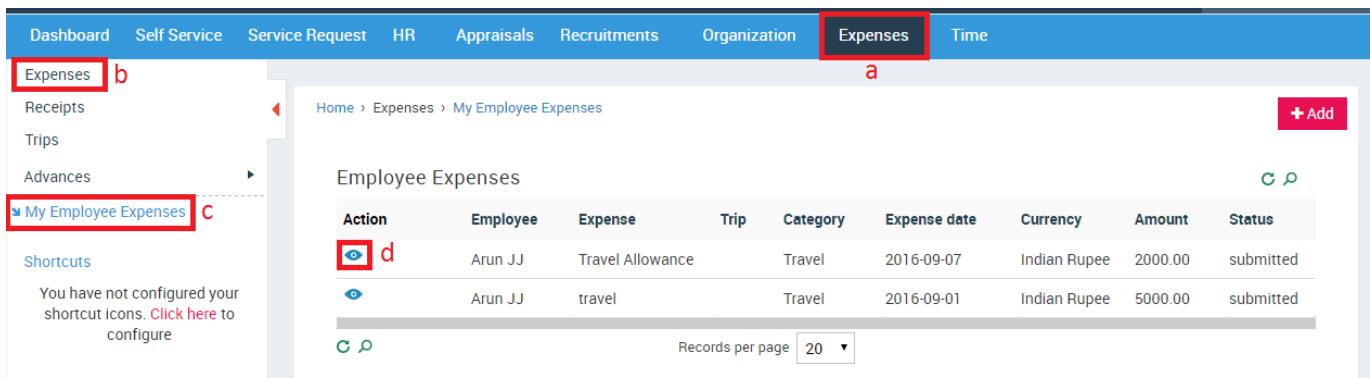
The screenshot shows the 'Create New' screen for expenses. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses' (selected), and 'Time'. The left sidebar has links for 'Receipts', 'Trips', 'Advances', and 'My Employee Expenses' (selected). The main form fields include 'Expense Name' (Accommodation), 'Category' (Traveling), 'Project' (Delta Project), 'Expense date' (2016-09-08), 'Amount' (INR 5000.00), 'Reimbursable' (Yes selected), 'Select Advance' (No Advance), 'Payment Mode' (Money), 'Payment Ref #' (12313), 'Add To Trip' (Trip To Canada), 'Description' (Trip To Canada), and an 'Upload Receipts' button. A 'Shortcuts' section notes that shortcut icons are not configured. The 'SAVE' button at the bottom is highlighted with a red box.

Figure 173

- Click **SAVE** button

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

Please refer Figure 174



The screenshot shows the 'Employee Expenses' list page. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses' (selected), and 'Time'. The left sidebar has links for 'Receipts', 'Trips', 'Advances', and 'My Employee Expenses' (selected). The main table lists two expense items:

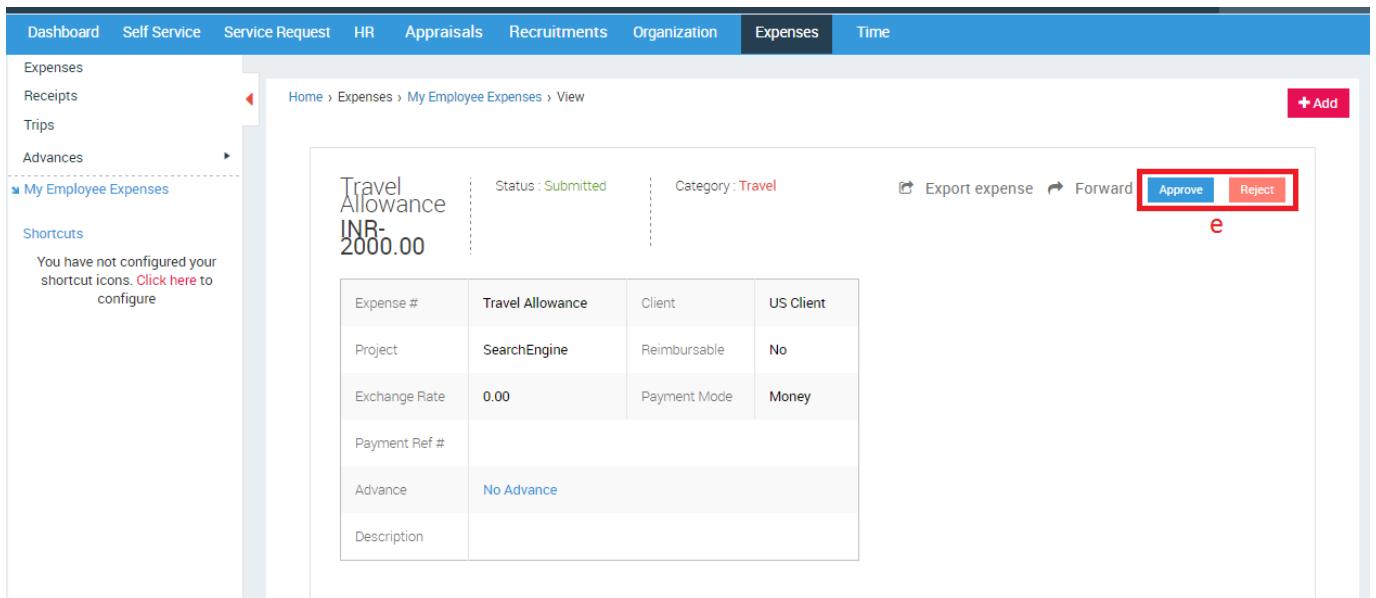
Action	Employee	Expense	Trip	Category	Expense date	Currency	Amount	Status
	Arun JJ	Travel Allowance		Travel	2016-09-07	Indian Rupee	2000.00	submitted
	Arun JJ	travel		Travel	2016-09-01	Indian Rupee	5000.00	submitted

Annotations: 'a' highlights the 'Expenses' menu item; 'b' highlights the 'My Employee Expenses' link in the sidebar; 'c' highlights the 'My Employee Expenses' link in the sidebar; 'd' highlights the first row's 'View' icon; 'e' highlights the 'Employee Expenses' section title.

Figure 174

- Click **Expenses** in the top menu
- Click **Expenses** in the left menu panel
- Click **My Employee Expenses** in the submenu
- Click **View** icon in the action column

Please refer Figure 175



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (selected), and Time. On the left sidebar, there are links for Expenses, Receipts, Trips, Advances, and My Employee Expenses (which is currently selected). A message in the sidebar says, "You have not configured your shortcut icons. Click here to configure". The main content area displays an expense detail page for a "Travel Allowance INR-2000.00". The status is "Submitted" and the category is "Travel". There are buttons for "Export expense", "Forward", "Approve" (highlighted with a red box), and "Reject". Below the main title, there is a table with expense details:

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

Figure 175

e. Click **Approve/Reject**

A confirmation message will be displayed.

*Please refer Figure 176*

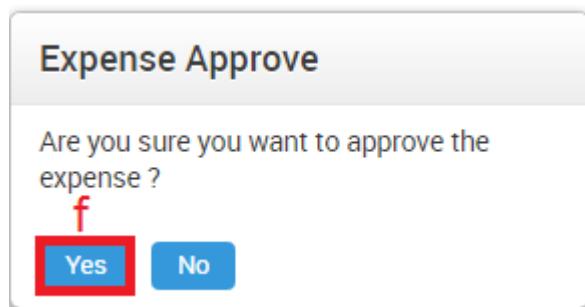
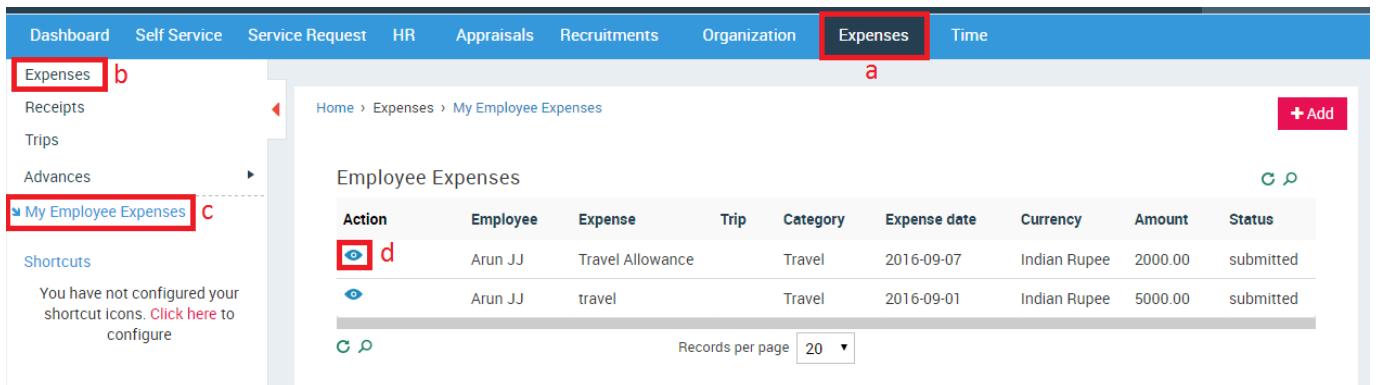


Figure 176

f. Click **Yes** Button

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

*Please refer Figure 177*



The screenshot shows the Sentrifugo web interface. The top navigation bar has tabs: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (which is highlighted with a red box), and Time. On the left, a sidebar menu has 'Expenses' (highlighted with a red box) at the top, followed by Receipts, Trips, Advances, and 'My Employee Expenses' (highlighted with a red box). Below that is a 'Shortcuts' section with a note about configuring icons. The main content area is titled 'Employee Expenses' and lists two entries:

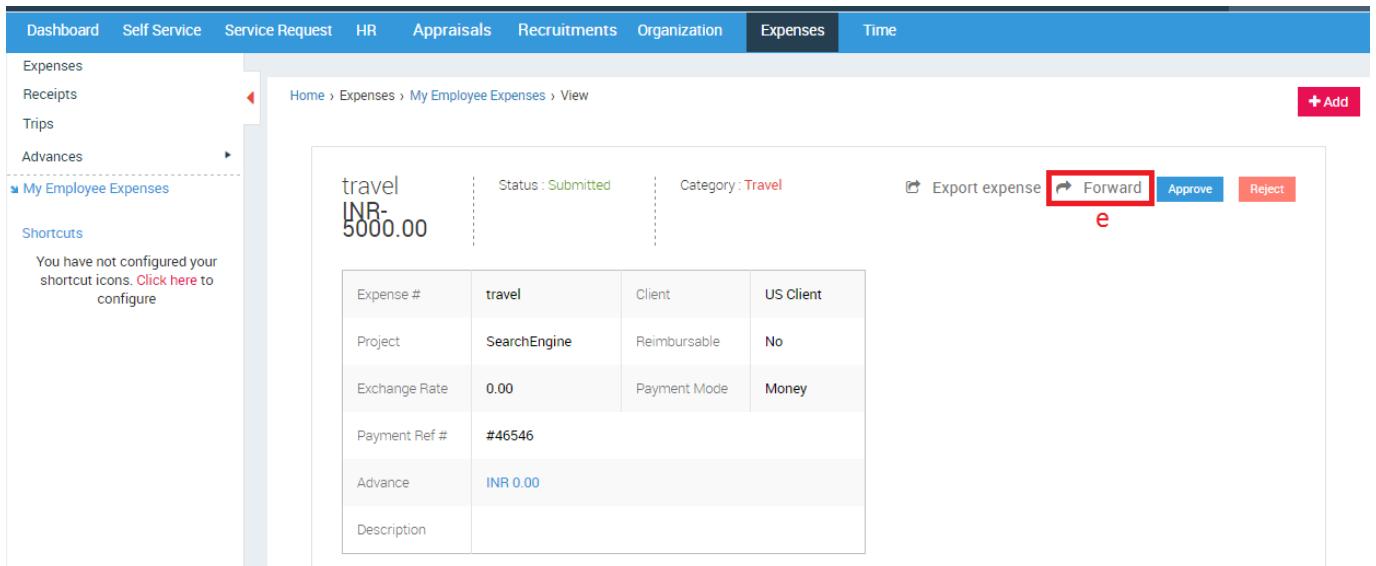
Action	Employee	Expense	Trip	Category	Expense date	Currency	Amount	Status
	Arun JJ	Travel Allowance		Travel	2016-09-07	Indian Rupee	2000.00	submitted
	Arun JJ	travel		Travel	2016-09-01	Indian Rupee	5000.00	submitted

At the bottom right of the content area, there are 'Records per page' dropdown and 'C P' buttons. A red letter 'a' is above the 'Employee Expenses' title, and a red letter 'b' is next to 'Expenses' in the sidebar.

Figure 177

- Click **Expenses** in the top menu
- Click **Expenses** on the left menu panel
- Click **My Employee Expenses** in the submenu
- Click **View** button in the action column

Please refer Figure 178



This screenshot shows a detailed view of an expense entry. The top navigation bar and sidebar are identical to Figure 177. The main content area shows a single expense entry with the following details:

travel INR-5000.00	Status : Submitted	Category : Travel	Export expense	Forward	Approve	Reject	
Expense #	travel	Client	US Client				
Project	SearchEngine	Reimbursable	No				
Exchange Rate	0.00	Payment Mode	Money				
Payment Ref #	#46546						
Advance	INR 0.00						
Description							

A red letter 'e' is positioned to the right of the 'Forward' button. The sidebar includes a 'Shortcuts' section with a note about configuring icons.

Figure 178

- Click **Forward** option

A small pop up window will open

Please refer Figure 178

Forward expense to X

John Michael	
Ron Born	 f
Rose Mary	
Jim Carol	

[View More](#)

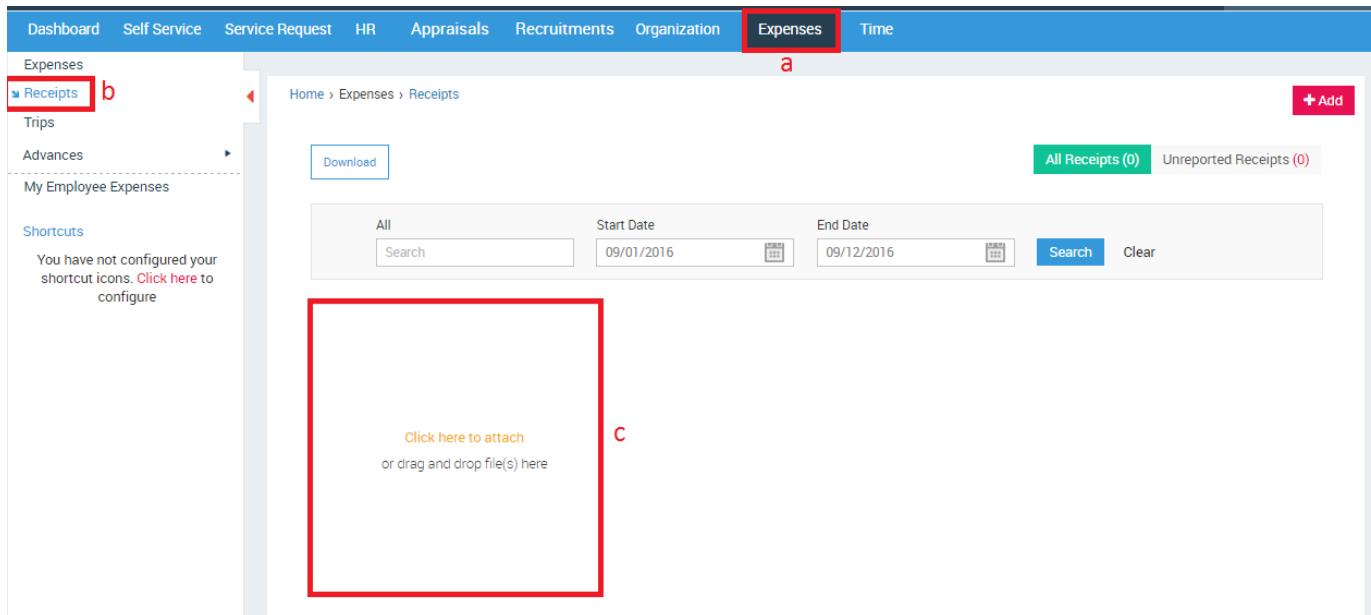
Figure 178

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

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

## 14.9 How do I upload Receipts?

Please refer Figure 179



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (which is highlighted with a red box 'a'), and Time. On the left sidebar, under the 'Expenses' section, there is a 'Receipts' link (highlighted with a red box 'b'). Below it are links for Trips and Advances. A message 'My Employee Expenses' is displayed. Under 'Shortcuts', there is a note: 'You have not configured your shortcut icons. Click here to configure'. The main content area shows a breadcrumb path 'Home > Expenses > Receipts'. It includes a 'Download' button, search filters for 'Start Date' (09/01/2016) and 'End Date' (09/12/2016), and buttons for 'Search' and 'Clear'. A large red box 'c' highlights the central area where users can click to attach or drag-and-drop files.

Figure 179

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

## 14.10 How do I download my Receipts?

Please refer Figure 180

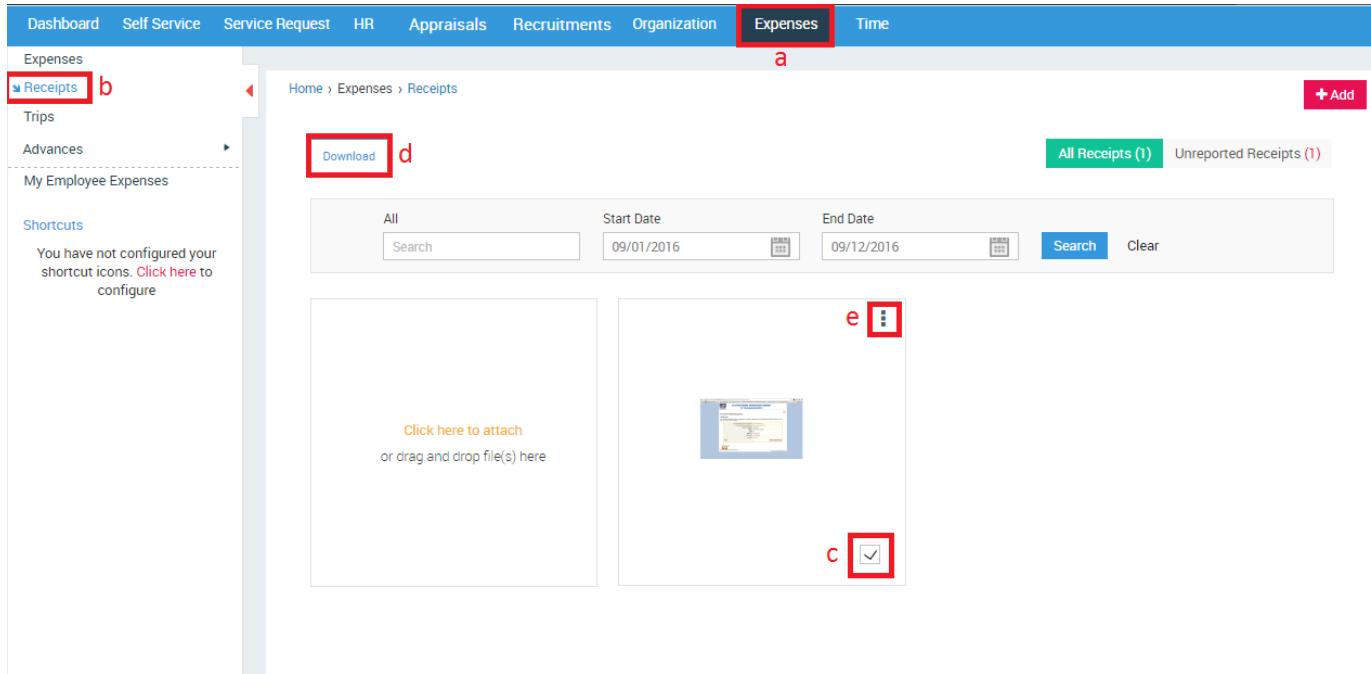


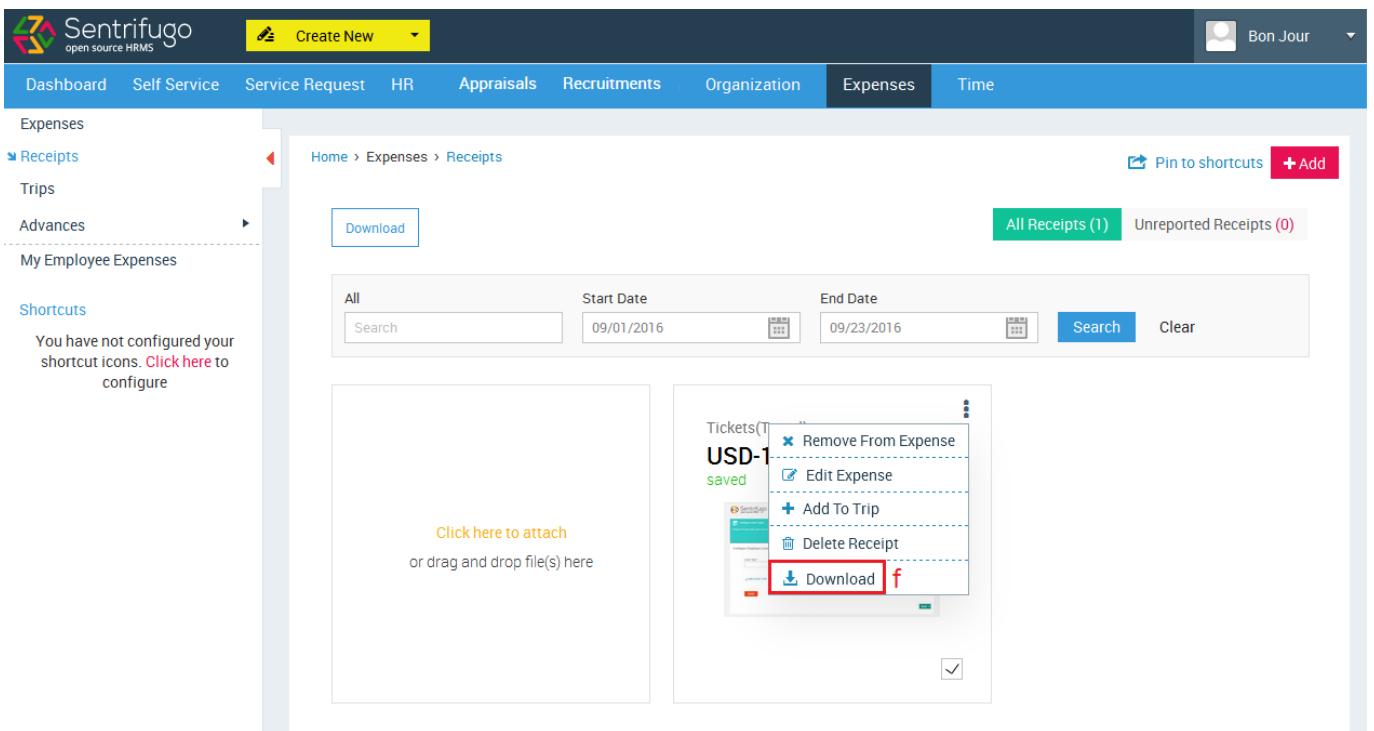
Figure 180

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

Or

- e. Click **More Action** icon

Please refer Figure 181



The screenshot shows the Sentrifugo Expenses Receipts page. On the left, there's a sidebar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (selected), Time, Expenses, Receipts (selected), Trips, Advances, My Employee Expenses, and Shortcuts. The main area shows a breadcrumb path: Home > Expenses > Receipts. There are buttons for Download, Pin to shortcuts, and Add. A search bar allows filtering by All, Start Date (09/01/2016), End Date (09/23/2016), Search, and Clear. Below the search is a large input field with placeholder text: "Click here to attach or drag and drop file(s) here". To its right, a receipt for "USD-1" is shown with a context menu open over it. The menu options are: Remove From Expense, Edit Expense, Add To Trip, Delete Receipt, and Download (which is highlighted with a red box). At the bottom right of the receipt area is a checked checkbox.

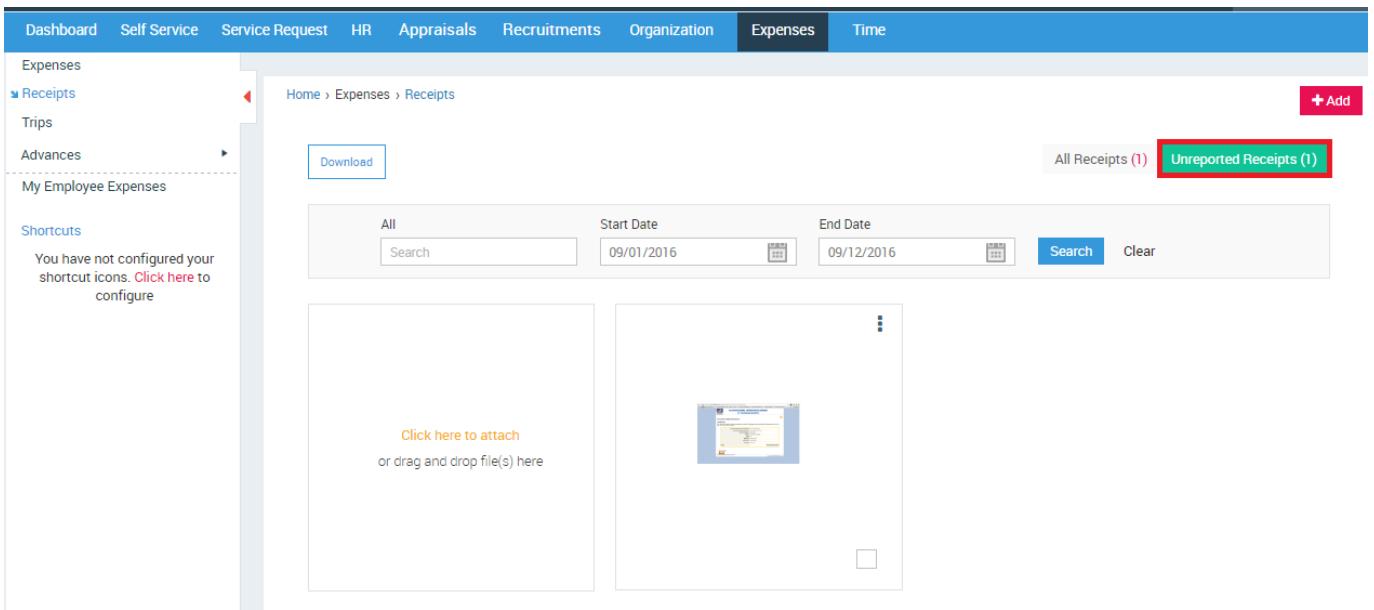
Figure 181

#### f. Select Download

### 14.11 What are Unreported Receipts?

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

Please refer Figure 182



This screenshot is similar to Figure 181 but shows the "Unreported Receipts" tab selected in the top navigation bar. The main area displays a receipt with a small thumbnail image. The "All Receipts (1)" button is highlighted with a red box, while the "Unreported Receipts (1)" button is also visible. The rest of the interface is identical to Figure 181, including the sidebar, search filters, and download context menu.

Figure 182

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

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

Please refer Figure 183

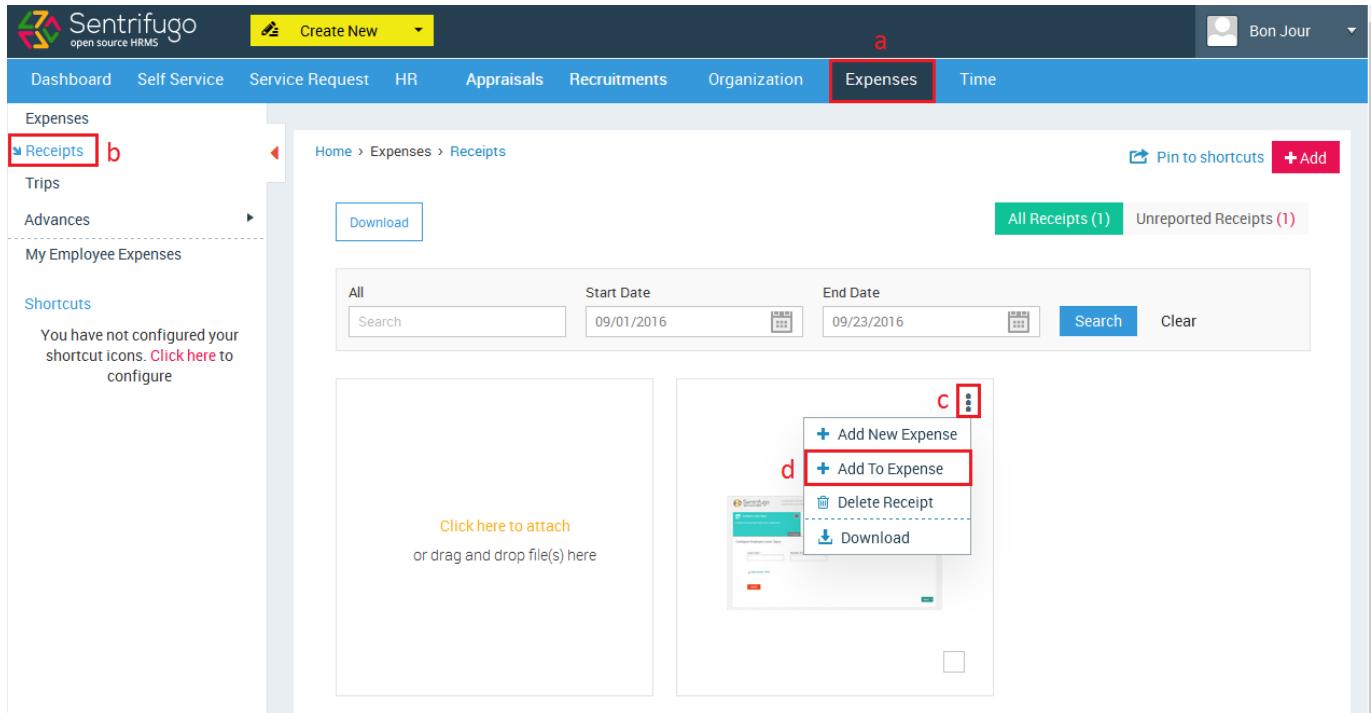


Figure 183

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

A small pop up window will open.

Please refer Figure 184

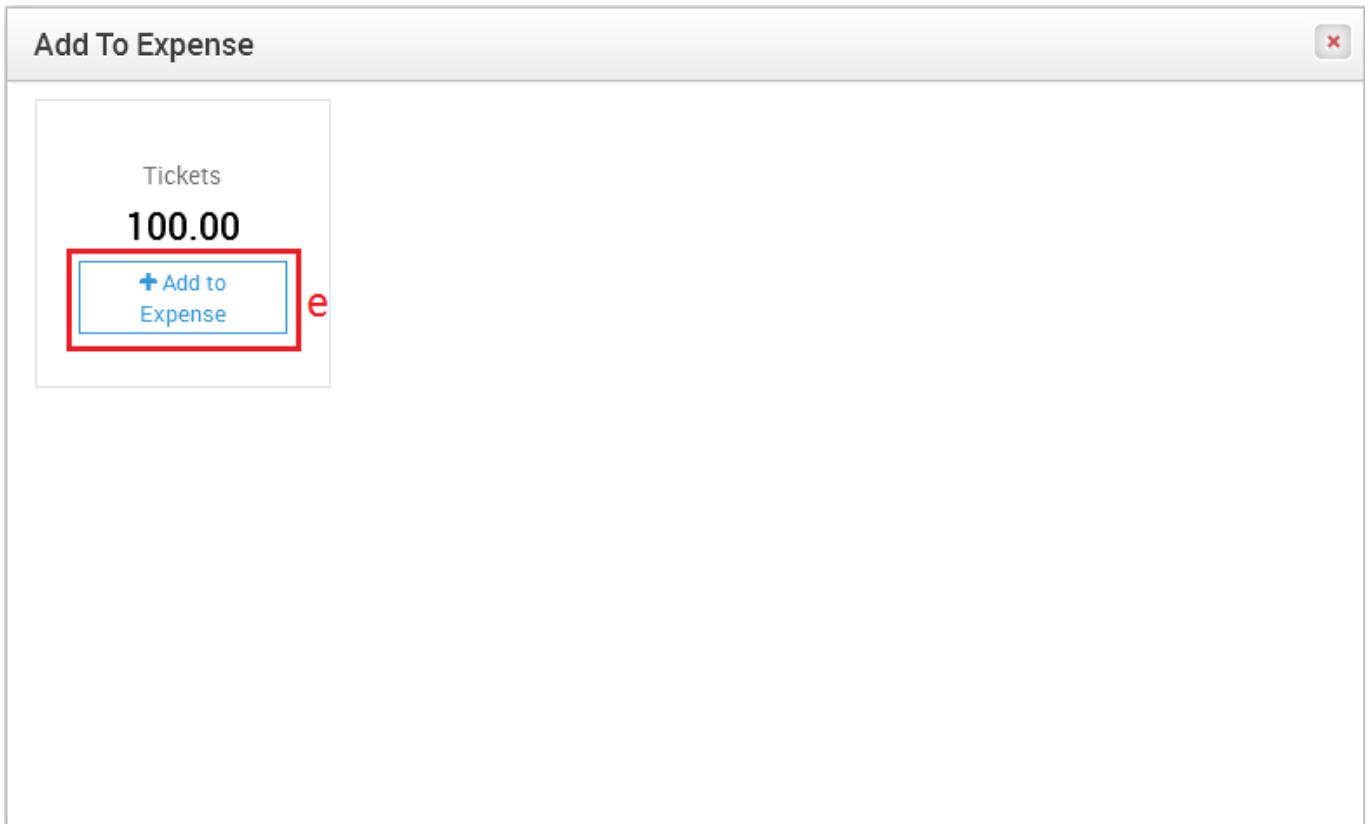
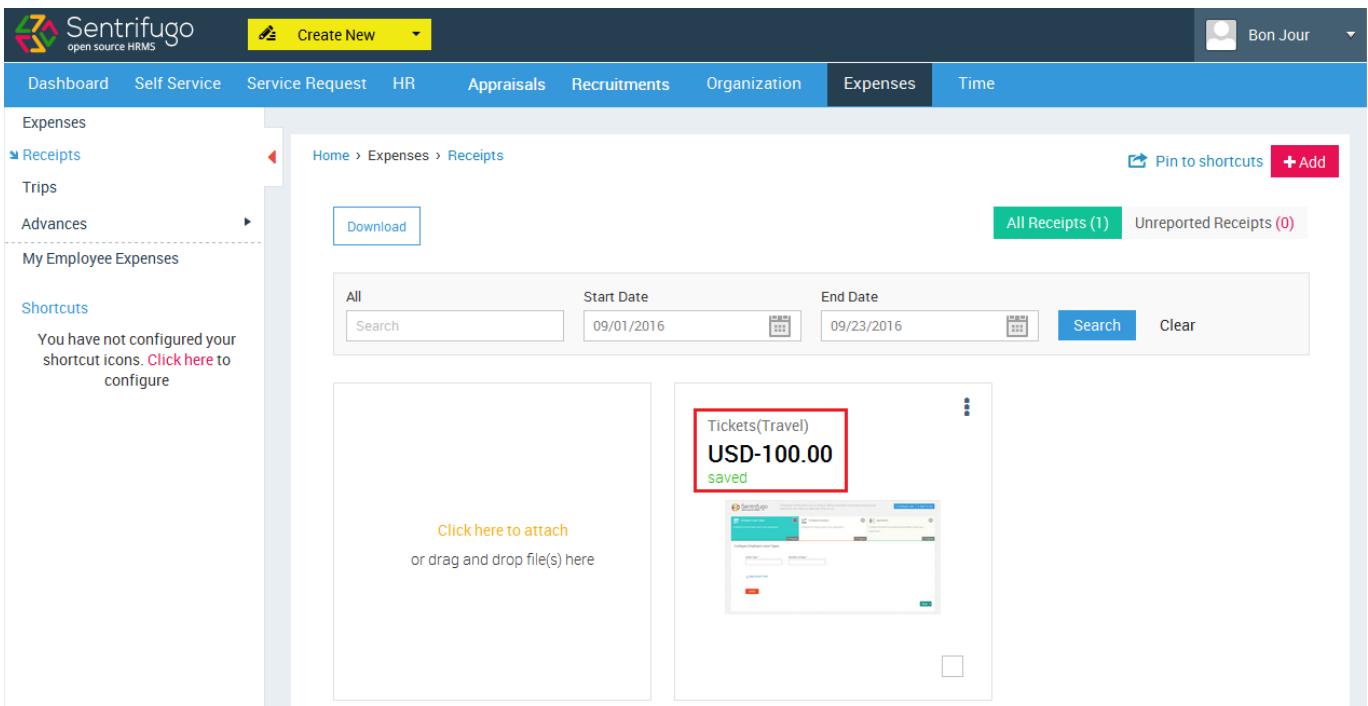


Figure 184

e. Click Add to Expense.

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



The screenshot shows the "Receipts" section of the "Expenses" module. On the right, a receipt for "Tickets(Travel)" worth "USD-100.00" is displayed with a green "saved" status. A red box highlights this receipt. On the left, a sidebar shows "Receipts" is currently selected. At the bottom, there's a note about未配置 shortcut图标 and a link to "Click here to configure".



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

## 14.13 How do I delete a Receipt?

Please refer Figure 185

The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (which is highlighted with a red box), Time, and a user profile for 'Bon Jour'. On the left, a sidebar has 'Receipts' selected (highlighted with a red box b). The main content area shows a list of receipts with search and filter options. A context menu (c) is open over a specific receipt, listing options like 'Remove From Expense', 'Edit Expense', 'Add To Trip', 'Delete Receipt' (which is highlighted with a red box d), and 'Download'.

Figure 185

- Click **Expenses** in the top menu
- Click **Receipts** on the left menu panel
- Click More Actions icon
- Click Delete Receipt

A confirmation message will be displayed.

Please refer Figure 186

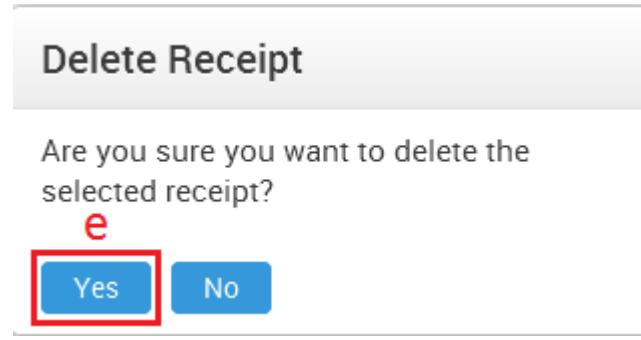


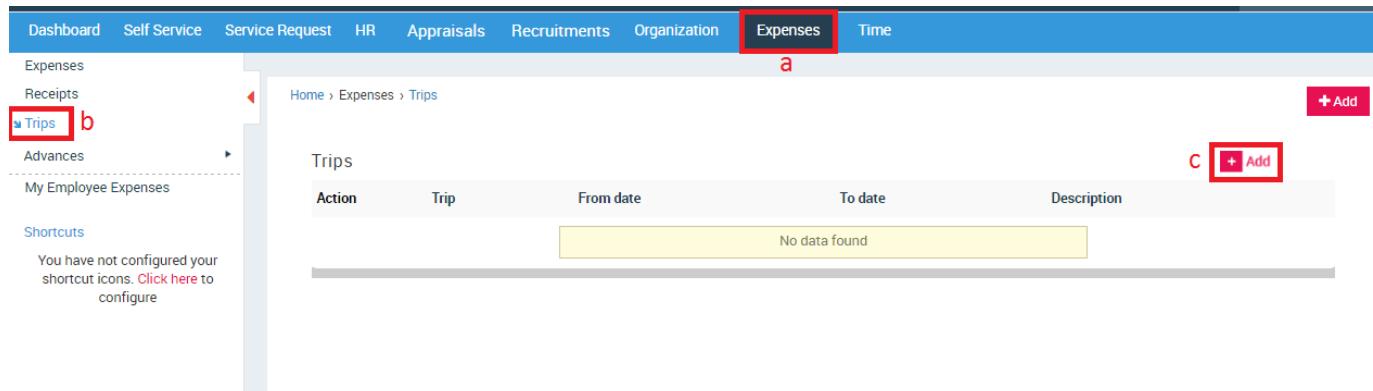
Figure 186

- Click **YES** Button

#### 14.14 How do I create a Trip?

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

Please refer Figure 187

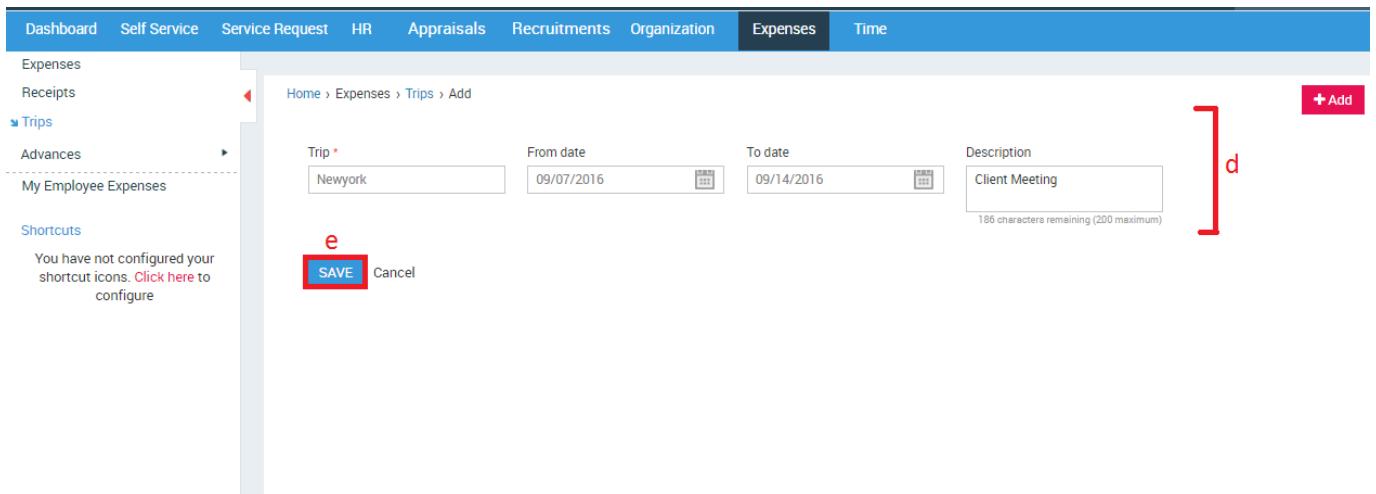


The image shows the Sentrifugo application interface for managing trips. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (highlighted with a red box and labeled 'a'), Time, Expenses (highlighted with a red box and labeled 'b'), Receipts, and a +Add button. The left sidebar contains links for Trips (highlighted with a red box and labeled 'b'), Advances, and My Employee Expenses. The main content area is titled "Trips" and displays a table with columns: Action, Trip, From date, To date, and Description. A message "No data found" is shown in the table body. There is also a +Add button in the top right corner of the main content area (labeled 'c').

Figure 187

- Click **Expenses** in the top menu
- Click **Trips** on the left menu panel
- Click **+Add** Button

Please refer Figure 188



The screenshot shows the 'Trips' add form in the Sentrifugo Expenses module. The 'Trip' field is populated with 'Newyork'. The 'From date' and 'To date' fields are set to '09/07/2016' and '09/14/2016' respectively. The 'Description' field contains 'Client Meeting'. A red bracket labeled 'd' points to the 'Description' field. A red box labeled 'e' points to the 'SAVE' button.

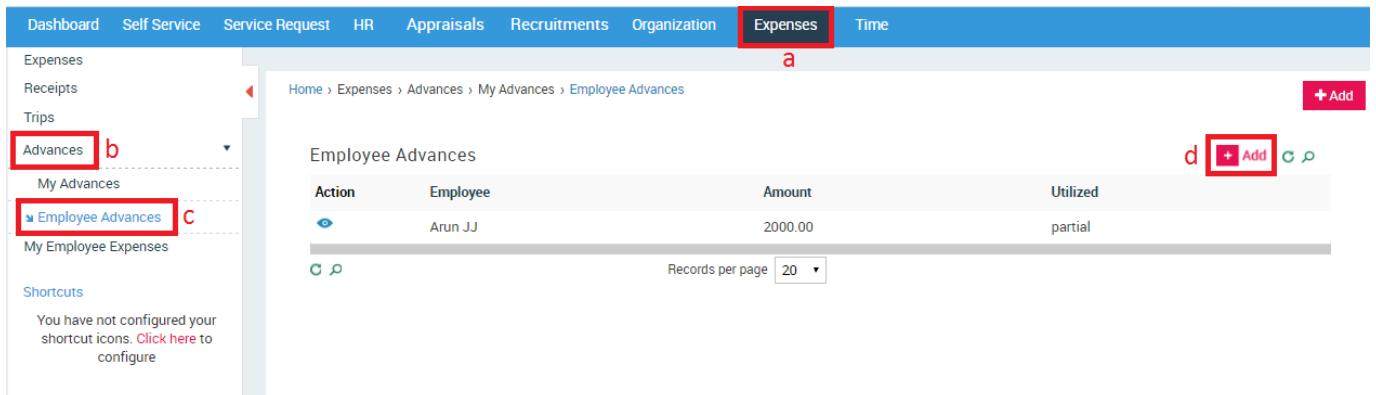
Figure 188

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

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

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

*Please refer Figure 189*



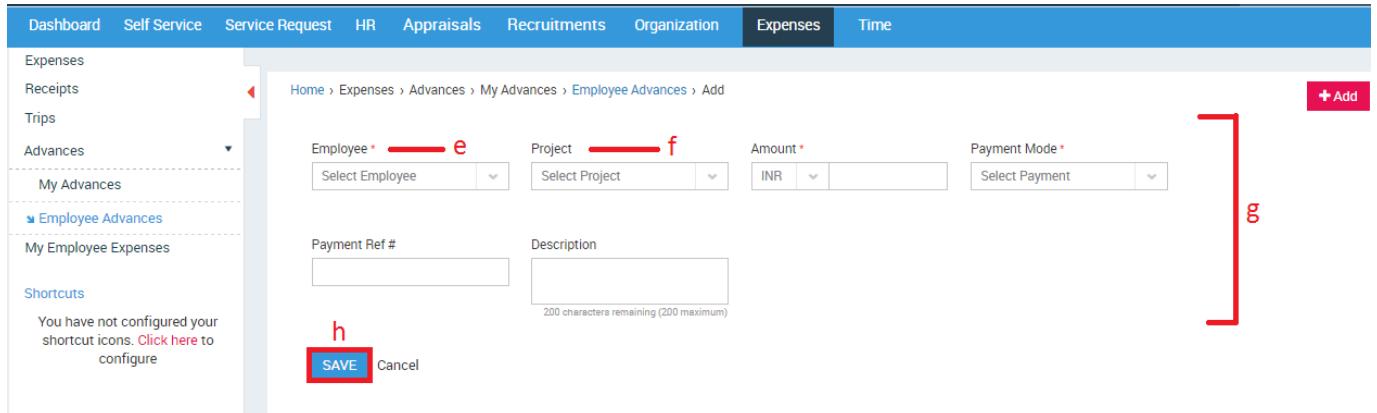
The screenshot shows the 'Employee Advances' list in the Sentrifugo Expenses module. A red box labeled 'a' points to the 'Expenses' tab in the top menu. A red box labeled 'b' points to the 'Advances' link in the left menu. A red box labeled 'c' points to the 'Employee Advances' link in the submenu. A red box labeled 'd' points to the '+Add' button in the top right corner. The table lists one advance entry:

Action	Employee	Amount	Utilized
	Arun JJ	2000.00	partial

Figure 189

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

Please refer Figure 190



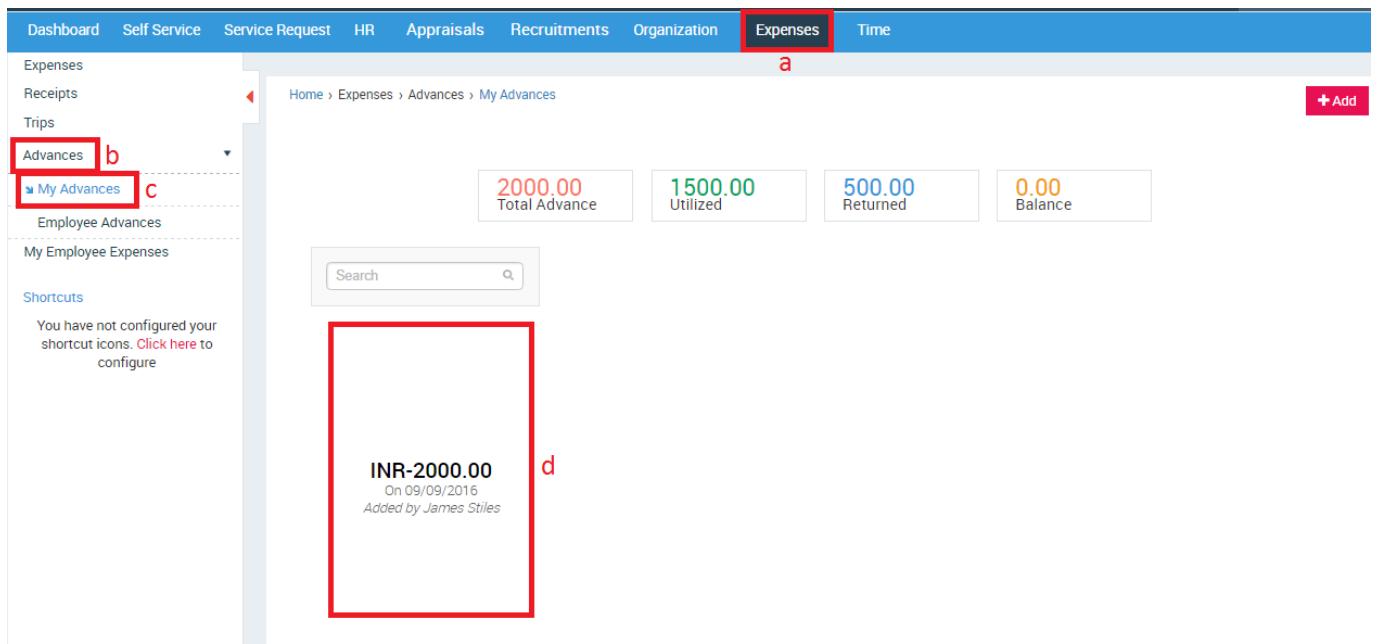
The screenshot shows the 'Employee Advances' add form. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (selected), and Time. On the left, a sidebar lists Expenses, Receipts, Trips, Advances (selected), My Advances, Employee Advances (selected), and My Employee Expenses. A 'Shortcuts' section indicates no configured icons. The main form fields are: Employee (dropdown labeled 'e'), Project (dropdown labeled 'f'), Amount (input field labeled 'g'), Payment Mode (dropdown), Payment Ref # (input field), Description (input field with character limit of 200), and a Save/Cancel button.

Figure 190

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

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

Please refer Figure 191



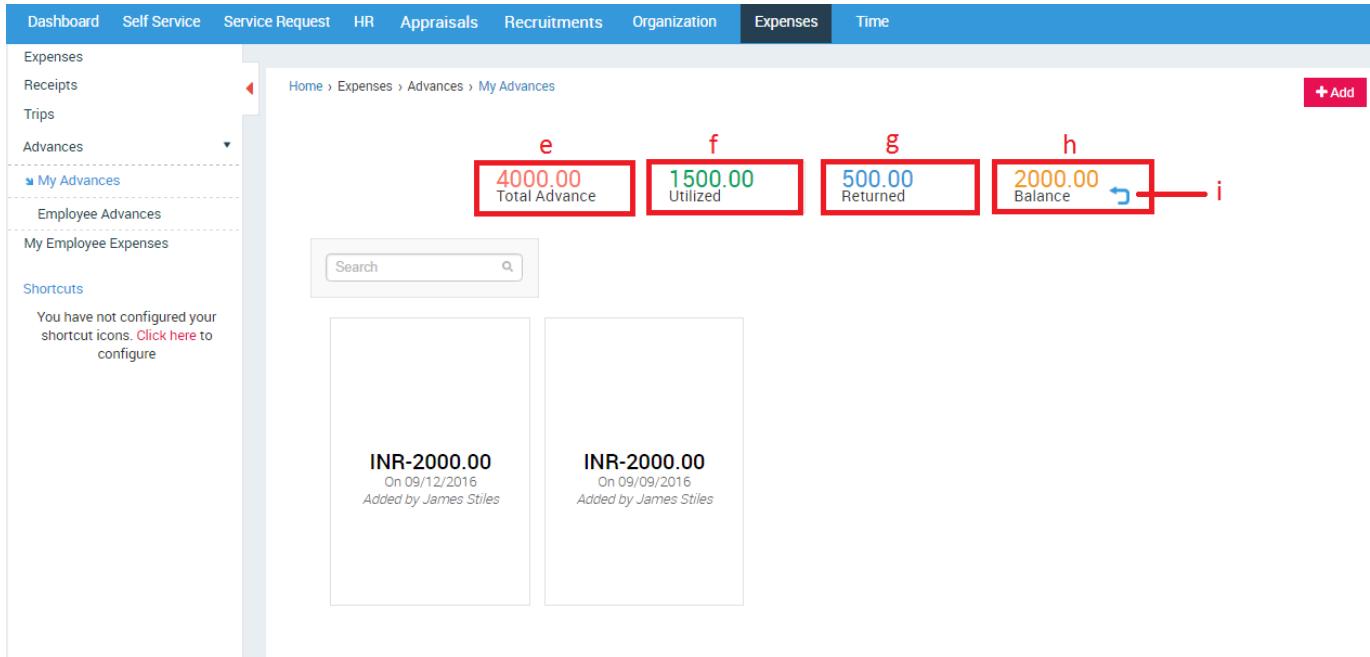
The screenshot shows the 'My Advances' list page. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (selected), and Time. The sidebar lists Advances (selected) and My Advances (selected). The main area displays advance details: Total Advance (2000.00), Utilized (1500.00), Returned (500.00), and Balance (0.00). A search bar is present. A specific advance entry is highlighted with a red box and labeled 'd': INR-2000.00 (On 09/09/2016, Added by James Stiles).

Figure 191

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

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

Please refer Figure 192



The screenshot shows the Sentrifugo web interface for managing expenses. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (which is currently selected), and Time. On the left, a sidebar menu lists Expenses, Receipts, Trips, Advances (with a dropdown for 'My Advances'), Employee Advances, and My Employee Expenses. A 'Shortcuts' section notes that no shortcut icons are configured. The main content area displays a summary of advances with red boxes labeled e through i:

- e. **4000.00** Total Advance
- f. **1500.00** Utilized
- g. **500.00** Returned
- h. **2000.00** Balance
- i. A red arrow points from the 'Balance' box to a blue 'Return' button.

Below the summary, there are two card-like entries for individual advances:

- INR-2000.00 On 09/12/2016 Added by James Stiles
- INR-2000.00 On 09/09/2016 Added by James Stiles

Figure 192

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

A small pop up window will open.

Please refer Figure 193

Return Advance

Amount \* Payment Mode \* Payment Ref #

INR Select Payment

Return To \* Description

Select Employee

200 characters remaining (200 maximum)

**SAVE** Cancel

**j**

**k**

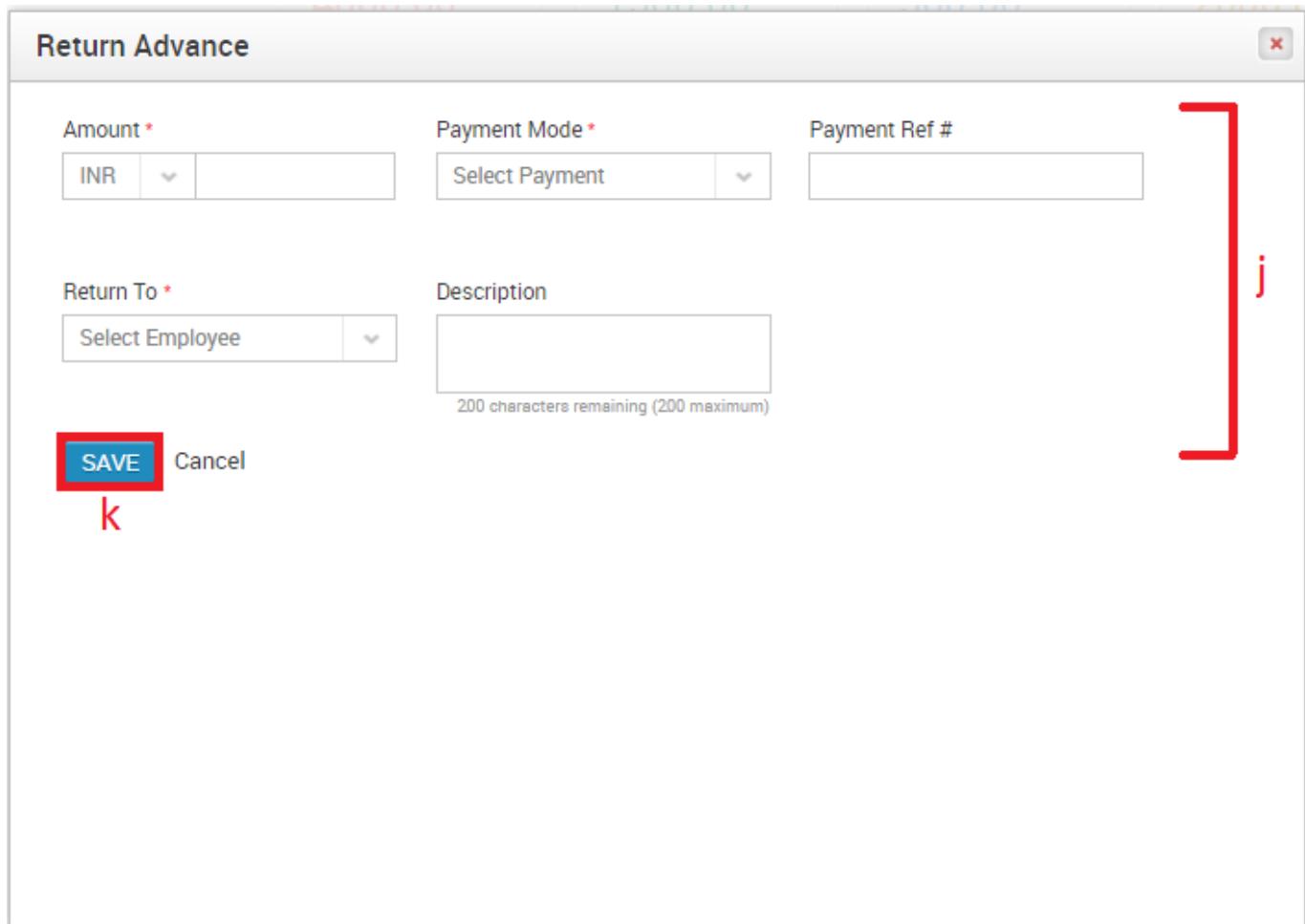
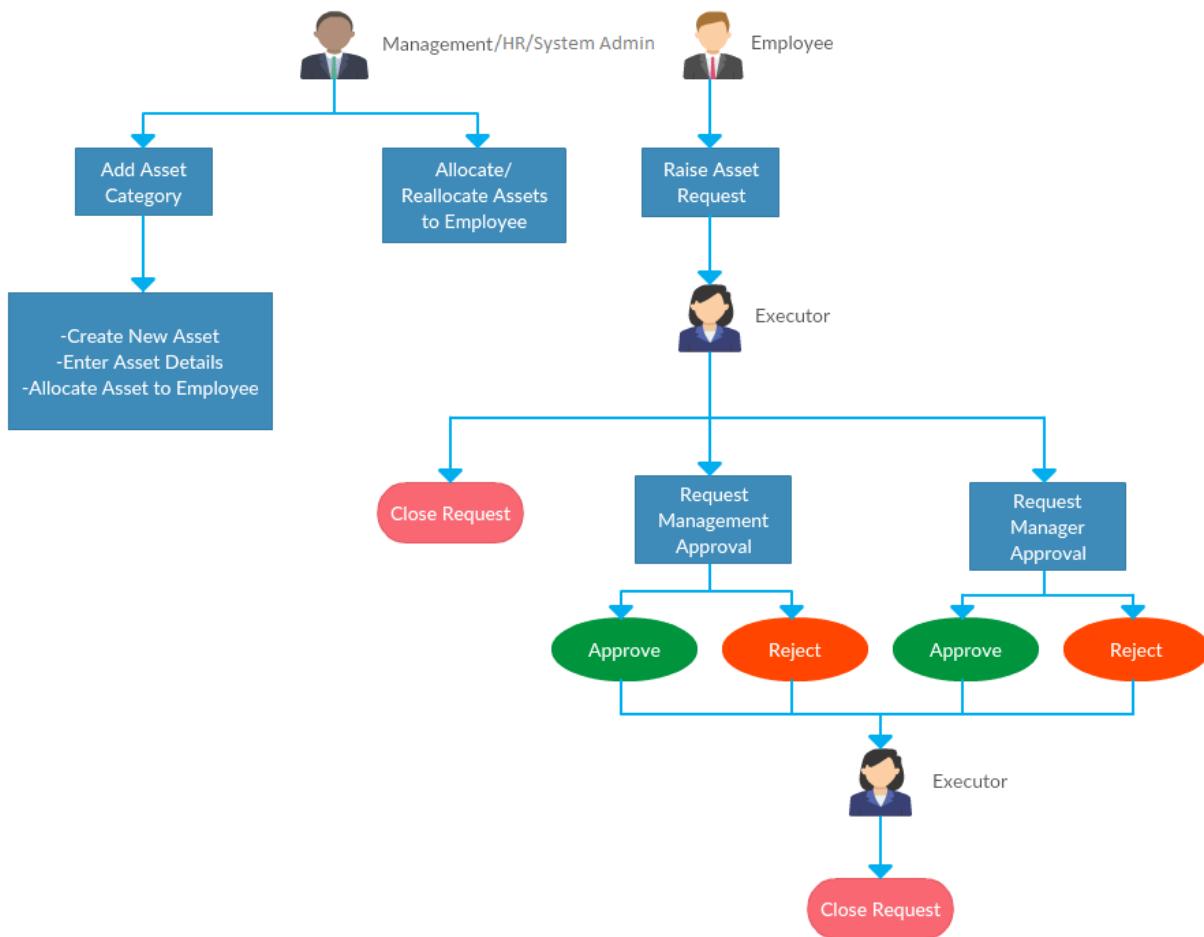


Figure 193

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

## 15. Assets

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



### Process Description:

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

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

## 15.1 How do I create an Asset Category?

Please refer Figure 194

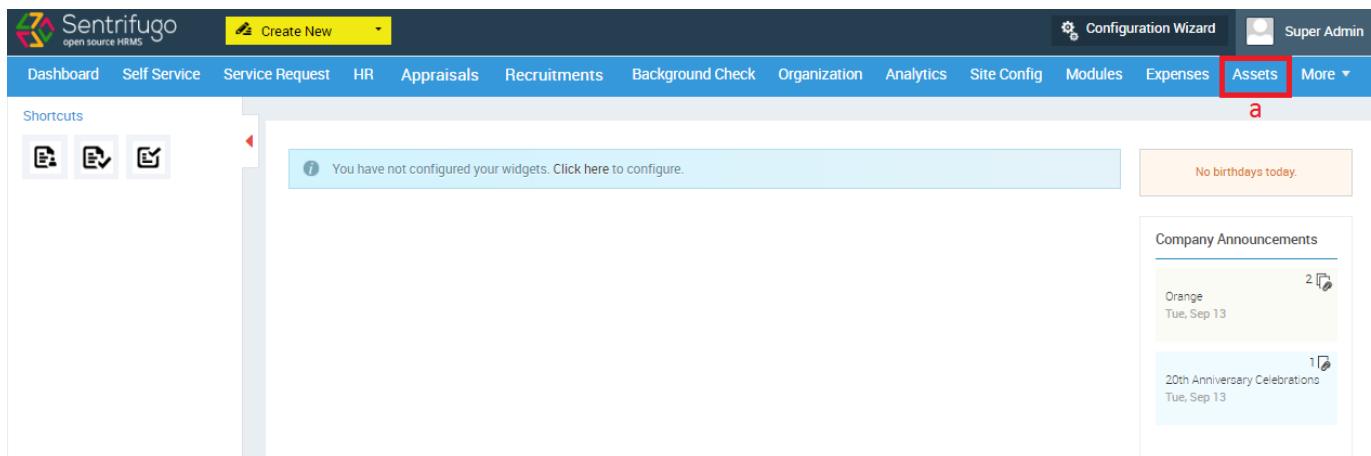


Figure 194

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

Please refer Figure 195

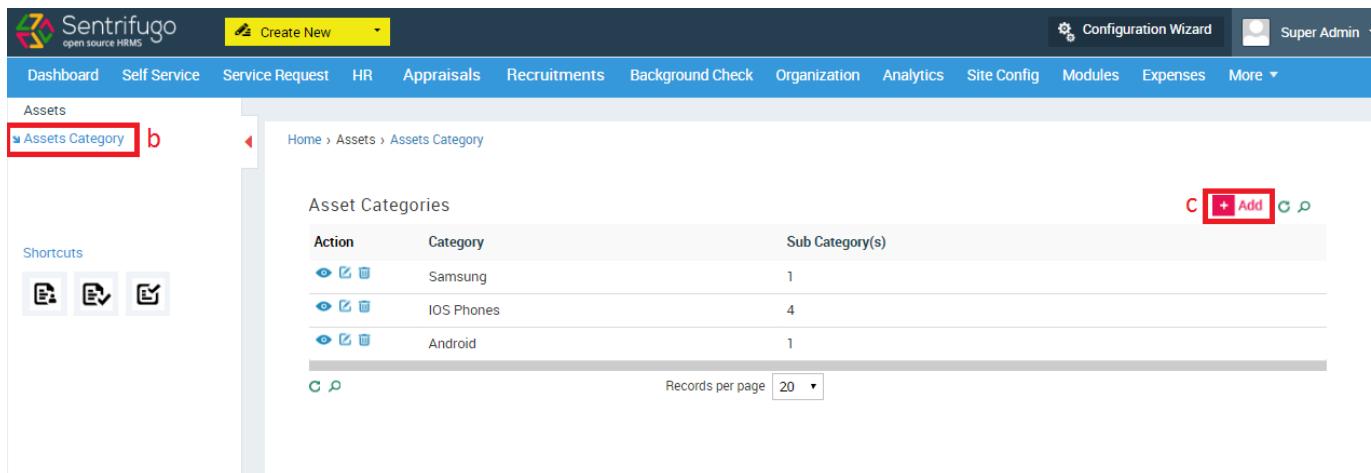


Figure 195

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

Please refer Figure 196

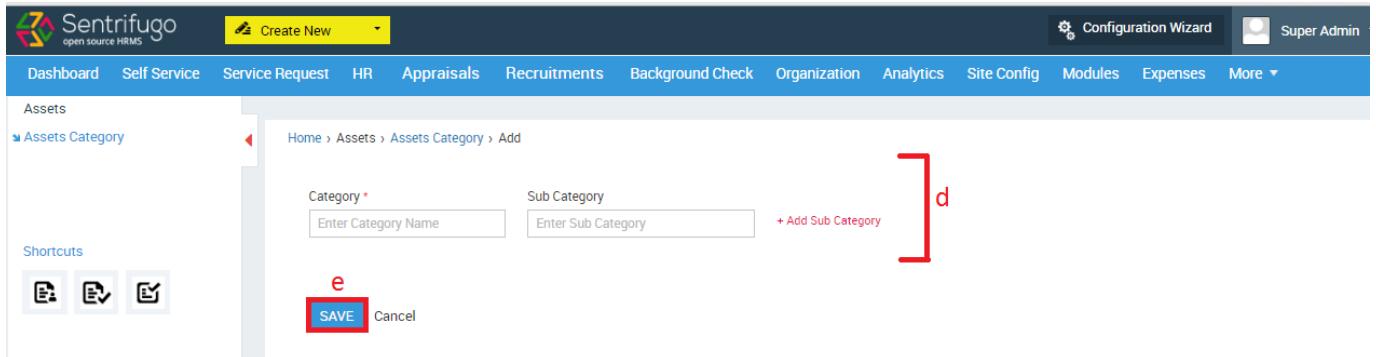


Figure 196

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

## 15.2 How do I add an Asset?

Please refer Figure 197

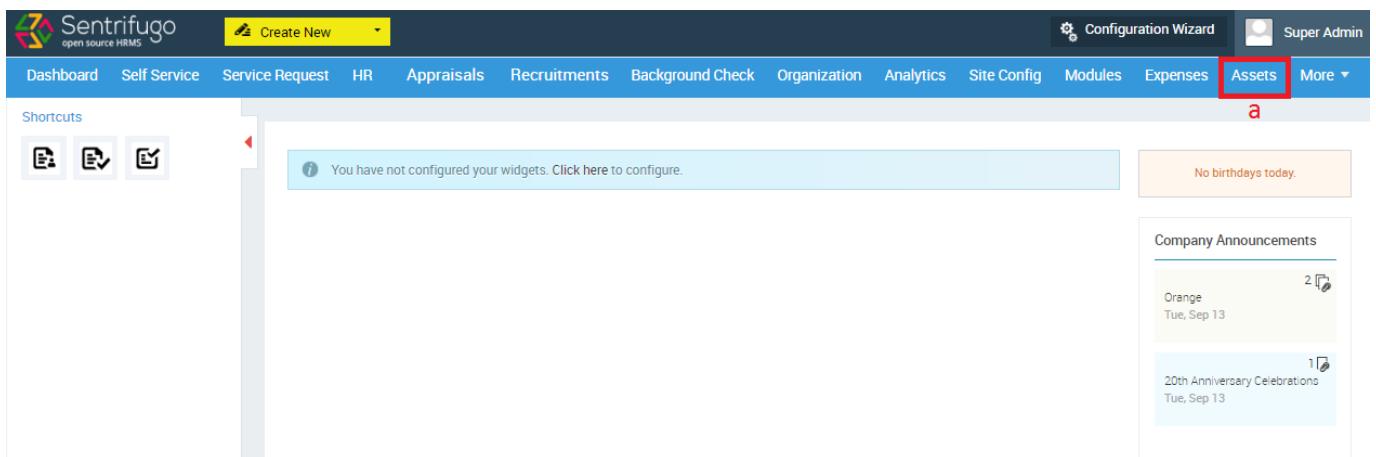
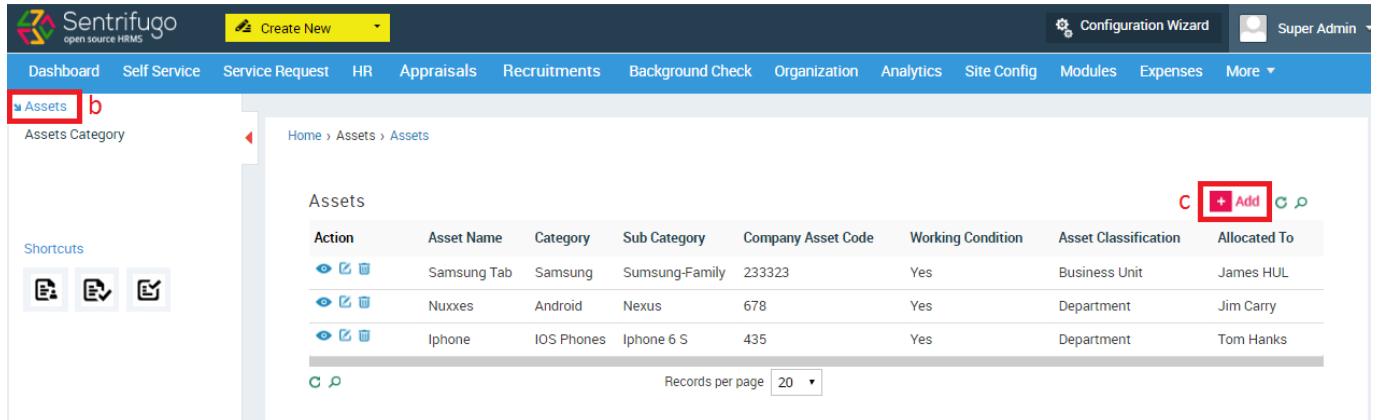


Figure 197

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

Please refer Figure 198

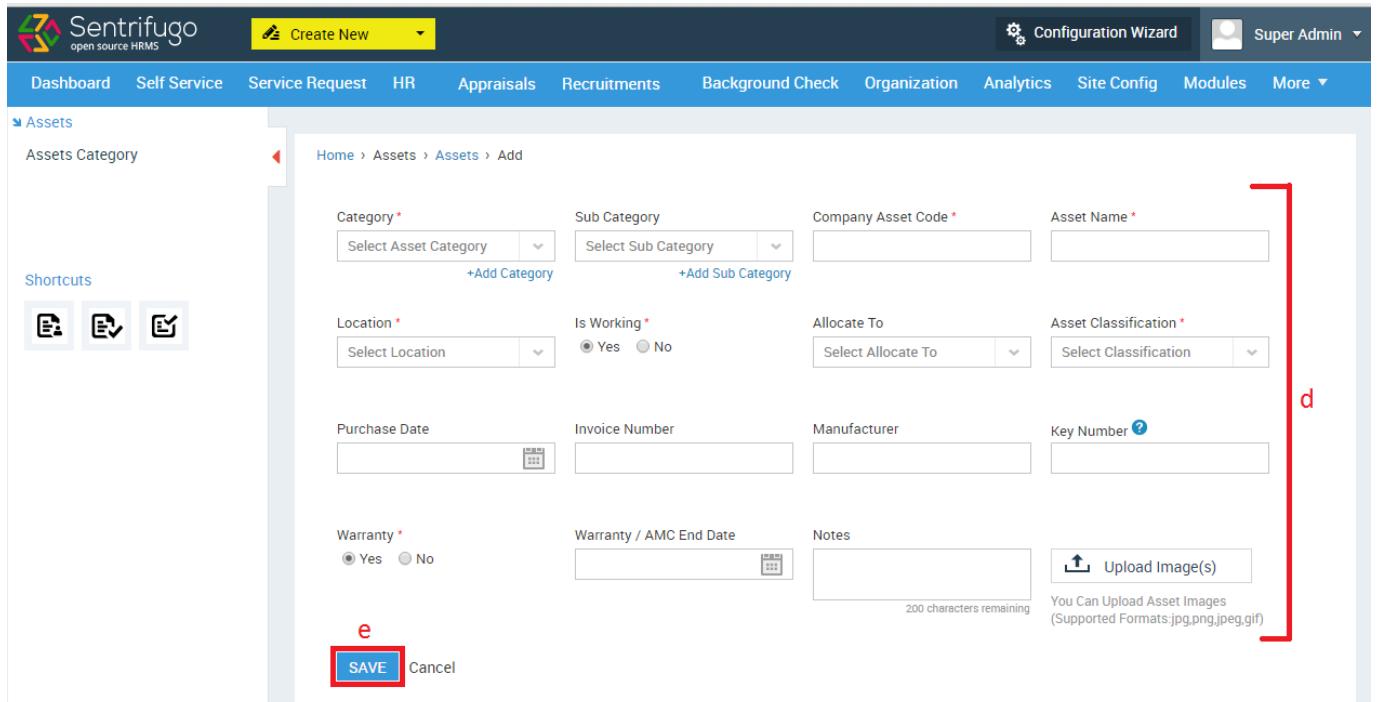


The screenshot shows the 'Assets' list page. The left sidebar has a 'Assets' link with a red box around it and the label 'b'. The top right corner has a '+Add' button with a red box around it and the label 'c'. The main content area displays a table of assets with columns: Action, Asset Name, Category, Sub Category, Company Asset Code, Working Condition, Asset Classification, and Allocated To. Three asset entries are listed: Samsung Tab, Nuxxes, and Iphone.

Figure 198

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

Please refer Figure 199



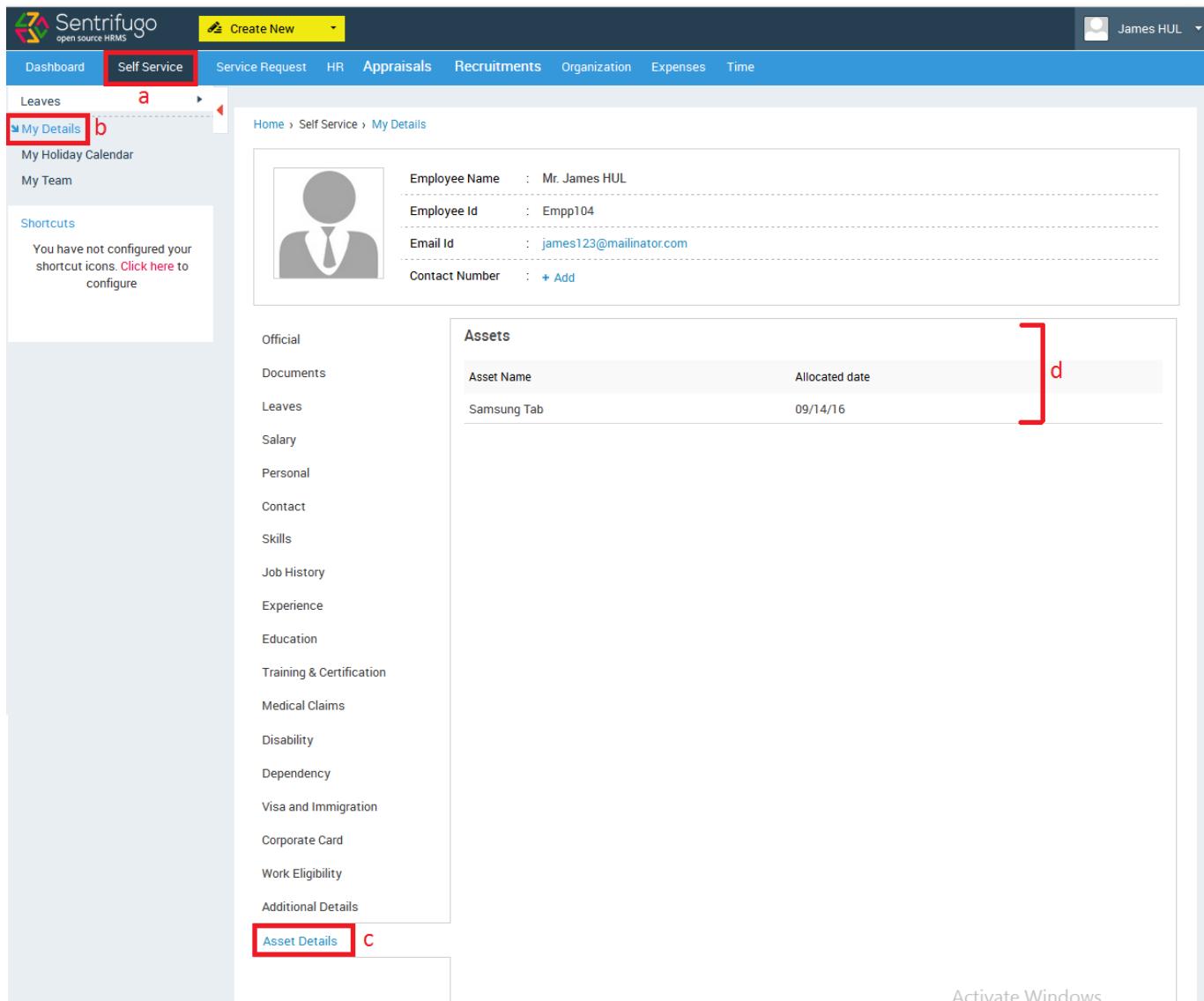
The screenshot shows the 'Assets' add form. The left sidebar has an 'Assets' link with a red box around it and the label 'b'. The top right corner has a '+Add' button with a red box around it and the label 'c'. The main content area contains various input fields grouped by a red bracket labeled 'd'. These fields include: Category (Select Asset Category), Sub Category (Select Sub Category), Company Asset Code, Asset Name, Location (Select Location), Is Working (radio buttons Yes/No), Allocate To (Select Allocate To), Asset Classification (Select Classification), Purchase Date, Invoice Number, Manufacturer, Key Number, Warranty (radio buttons Yes/No), Warranty / AMC End Date, Notes (text area with character limit 200), and an 'Upload Image(s)' button. At the bottom left, there is a 'SAVE' button with a red box around it and the label 'e'.

Figure 199

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

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

Please refer Figure 200



The screenshot shows the Sentrifugo self-service interface. At the top, there is a navigation bar with links for Dashboard, Self Service (which is highlighted with a red box and labeled 'a'), Create New, Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. On the far right, there is a user profile for James HUL.

The main content area has a left sidebar with a 'My Details' section (highlighted with a red box and labeled 'b') containing a user icon and the text 'My Holiday Calendar' and 'My Team'. Below this is a 'Shortcuts' section listing various options like Official, Documents, Leaves, Salary, Personal, Contact, Skills, Job History, Experience, Education, Training & Certification, Medical Claims, Disability, Dependency, Visa and Immigration, Corporate Card, Work Eligibility, and Additional Details. The 'Asset Details' option is also listed here and highlighted with a red box and labeled 'c'.

The main panel displays 'My Details' information for Mr. James HUL, including Employee Name, Employee Id, Email Id, and Contact Number. It also shows an 'Assets' section with a table:

Assets	
Asset Name	Allocated date
Samsung Tab	09/14/16

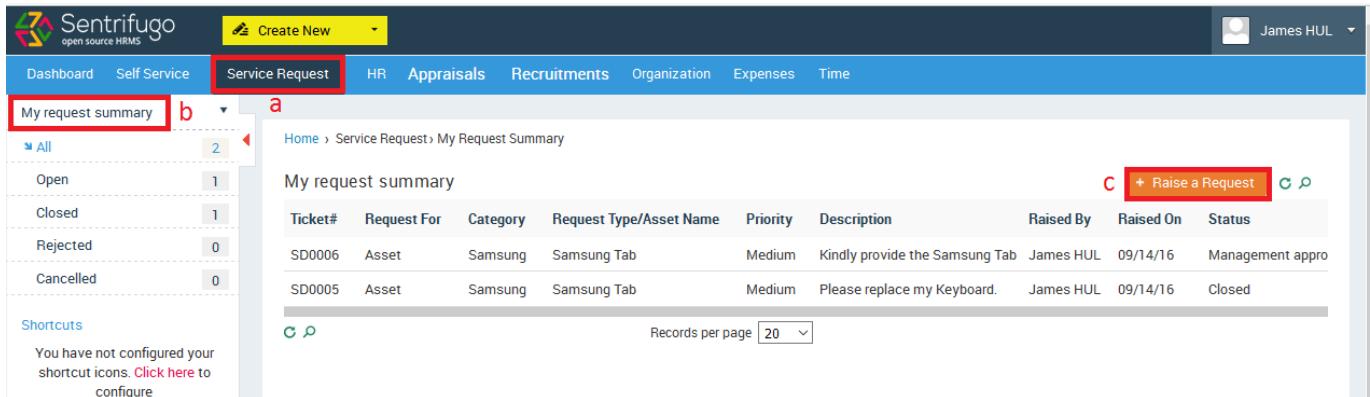
A red bracket labeled 'd' highlights the 'Assets' section.

Figure 200

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

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

Please refer Figure 201

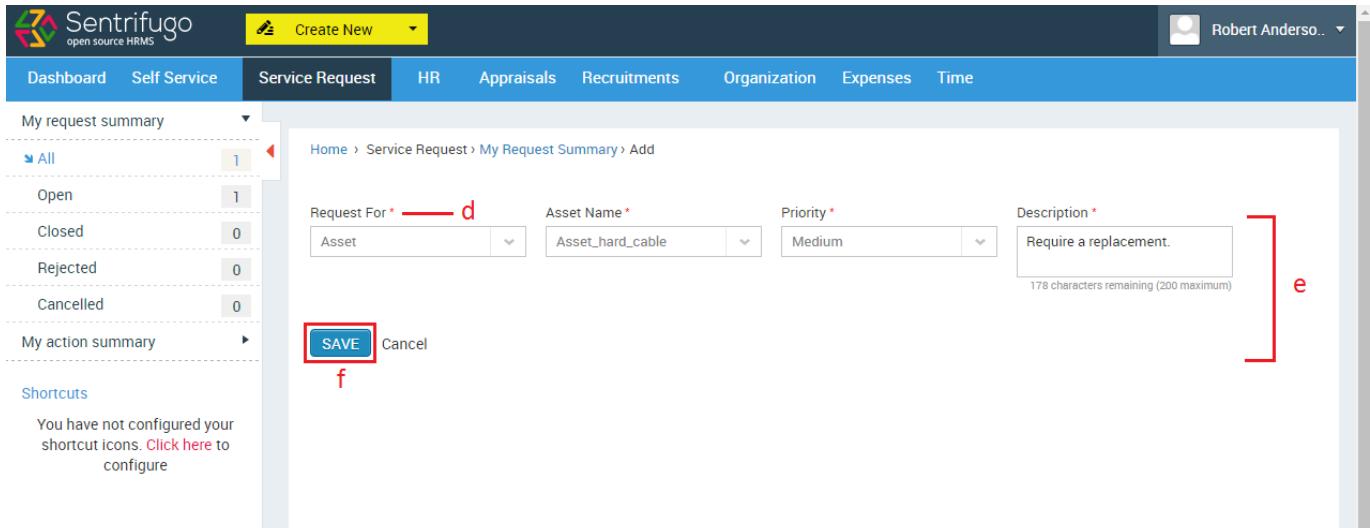


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New' (with a dropdown arrow), 'James HUL' (user profile), and tabs for Dashboard, Self Service, Service Request (highlighted with a red box), HR, Appraisals, Recruitments, Organization, Expenses, and Time. Below the navigation is a sidebar with 'My request summary' (highlighted with a red box) and a 'Shortcuts' section. The main content area displays a table titled 'My request summary' with two rows of data. The table columns are: Ticket#, Request For, Category, Request Type/Asset Name, Priority, Description, Raised By, Raised On, and Status. The first row has Ticket# SD0006, Request For Asset, Category Samsung, Request Type/Asset Name Samsung Tab, Priority Medium, Description Kindly provide the Samsung Tab, Raised By James HUL, Raised On 09/14/16, and Status Management appro. The second row has Ticket# SD0005, Request For Asset, Category Samsung, Request Type/Asset Name Samsung Tab, Priority Medium, Description Please replace my Keyboard., Raised By James HUL, Raised On 09/14/16, and Status Closed. A red letter 'b' is placed next to the 'My request summary' box. A red letter 'a' is placed above the main content area. A red letter 'c' is placed next to the '+ Raise a Request' button.

Figure 201

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

Please refer Figure 202



The screenshot shows the 'Add' screen for a new Service Request. The top navigation bar includes 'Create New' (with a dropdown arrow), 'Robert Anderso...' (user profile), and tabs for Dashboard, Self Service, Service Request (highlighted with a red box), HR, Appraisals, Recruitments, Organization, Expenses, and Time. Below the navigation is a sidebar with 'My request summary' and a 'My action summary' section. The main content area displays a form with fields: 'Request For' (highlighted with a red box and labeled 'd'), 'Asset Name' (highlighted with a red box), 'Priority' (set to Medium), and 'Description' (containing 'Require a replacement.' and a note '178 characters remaining (200 maximum)'). A red bracket 'e' groups the 'Asset Name', 'Priority', and 'Description' fields. A red box highlights the 'SAVE' button, which is labeled 'f'.

Figure 202

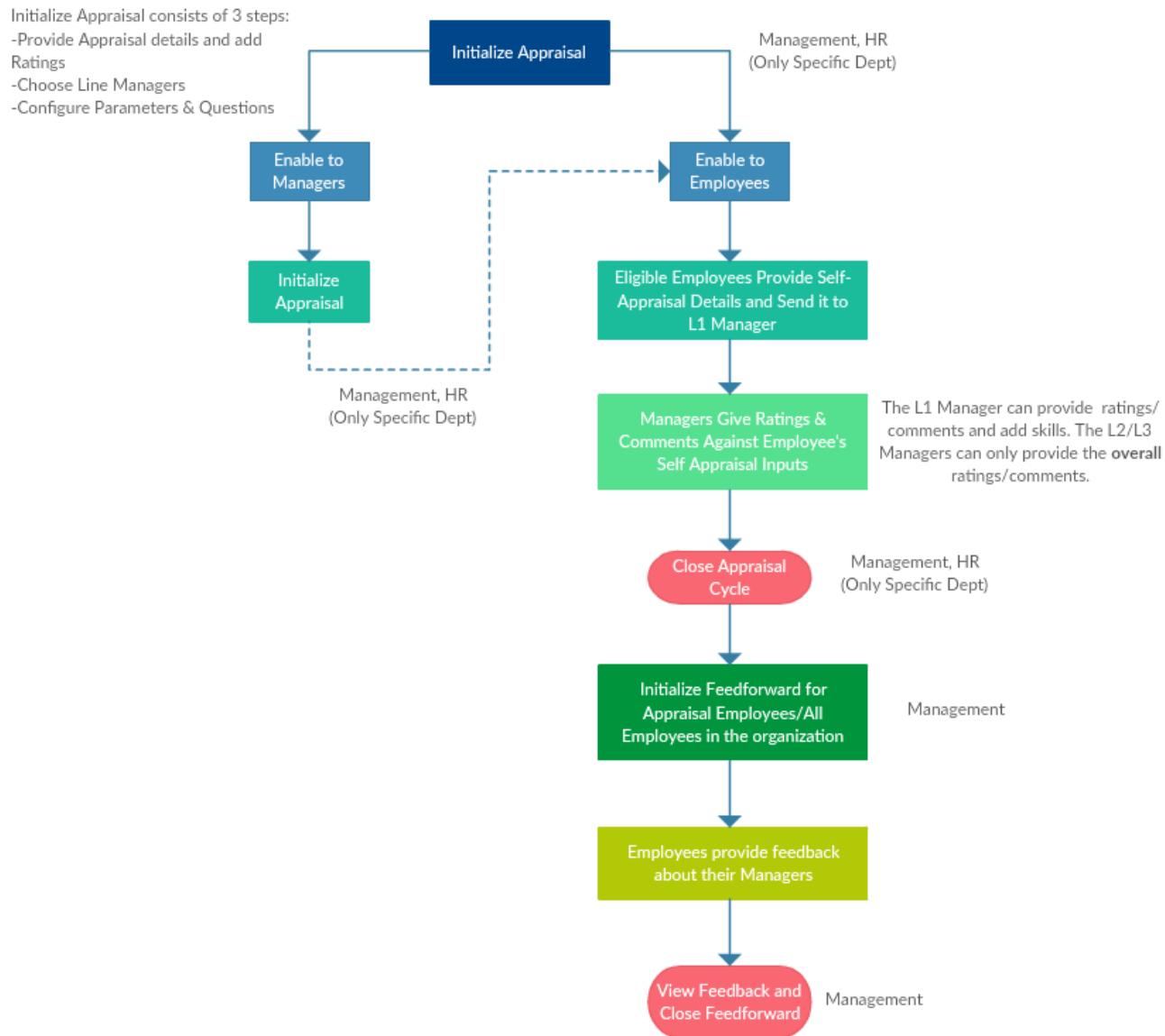
- Select **Asset** in the field 'Request For'
- Fill in the required details
- Click **SAVE** button



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

## 16. Appraisals

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



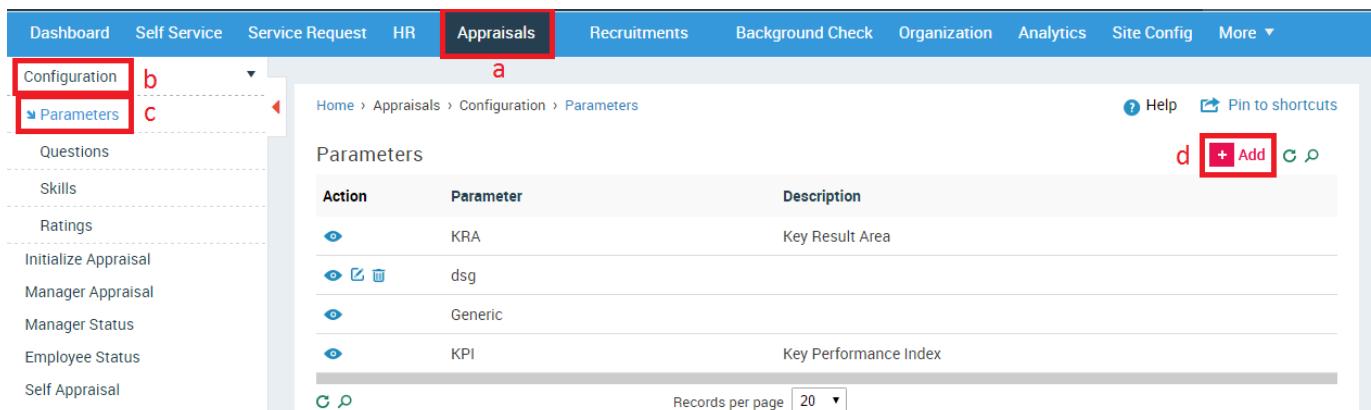
### Process Description:

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

## 16.1 How do I add Parameters?

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

Please refer Figure 203



The screenshot shows the Sentrifugo application interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (which is highlighted in red), Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar menu lists Configuration (highlighted in red), Questions, Skills, Ratings, Initialize Appraisal, Manager Appraisal, Manager Status, Employee Status, and Self Appraisal. Under Configuration, there are sub-links for Parameters (highlighted in red) and Help. The main content area displays a table titled 'Parameters' with columns for Action, Parameter, and Description. The table contains four rows: KRA (Key Result Area), dsg (description), Generic, and KPI (Key Performance Index). At the bottom right of the table are buttons for Help, Pin to shortcuts, Add (highlighted in red), and a search icon. Below the table are buttons for Records per page (set to 20) and a search icon.

Figure 203

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

Please refer Figure 204

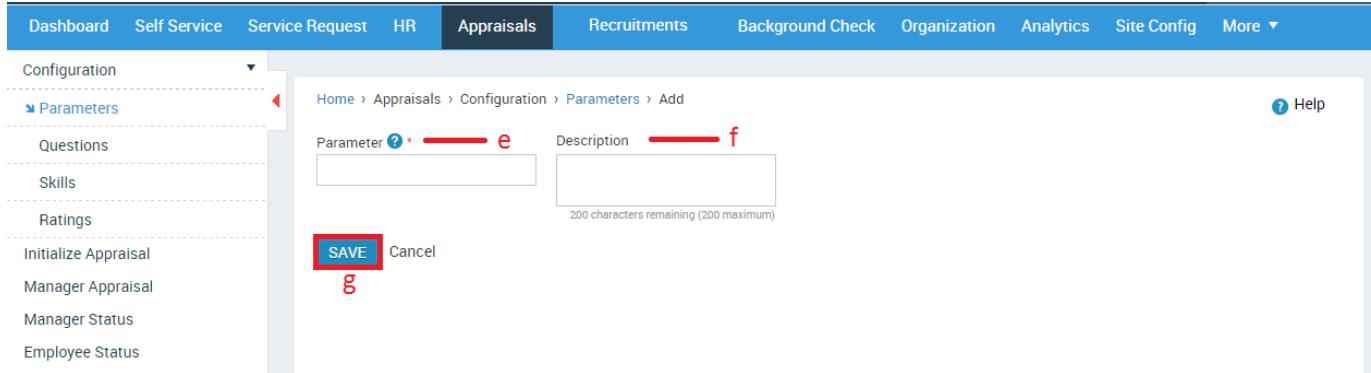


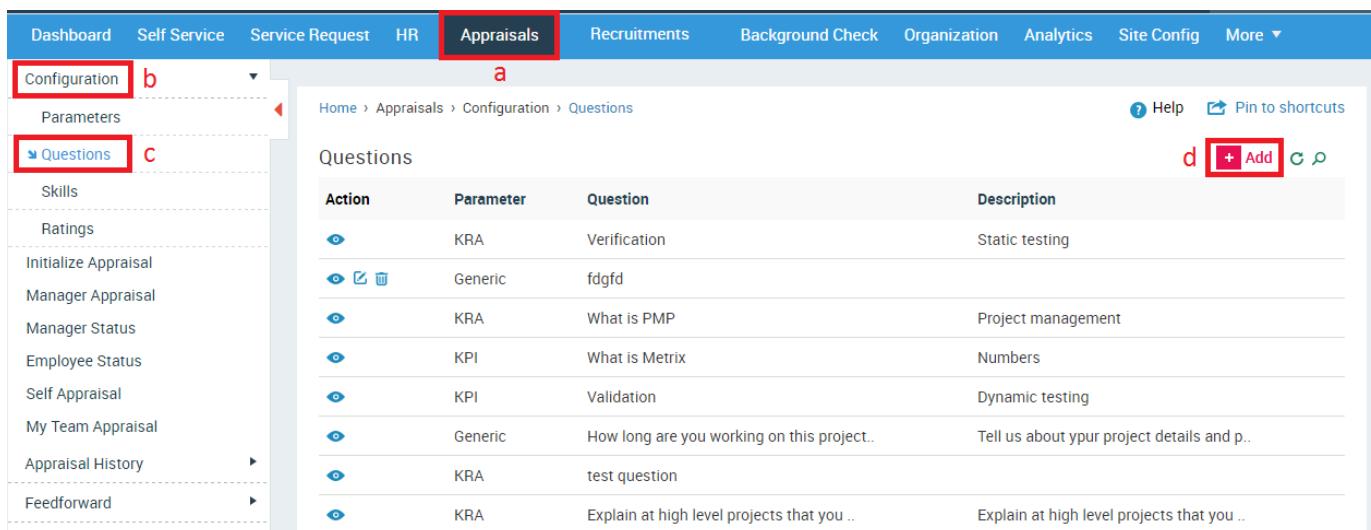
Figure 204

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

## 16.2 How do I add Questions?

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

Please refer Figure 205



Action	Parameter	Question	Description
	KRA	Verification	Static testing
	Generic	fdgfd	
	KRA	What is PMP	Project management
	KPI	What is Matrix	Numbers
	KPI	Validation	Dynamic testing
	Generic	How long are you working on this project..	Tell us about your project details and p...
	KRA	test question	
	KRA	Explain at high level projects that you ..	Explain at high level projects that you ..

Figure 205

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

Please refer Figure 206

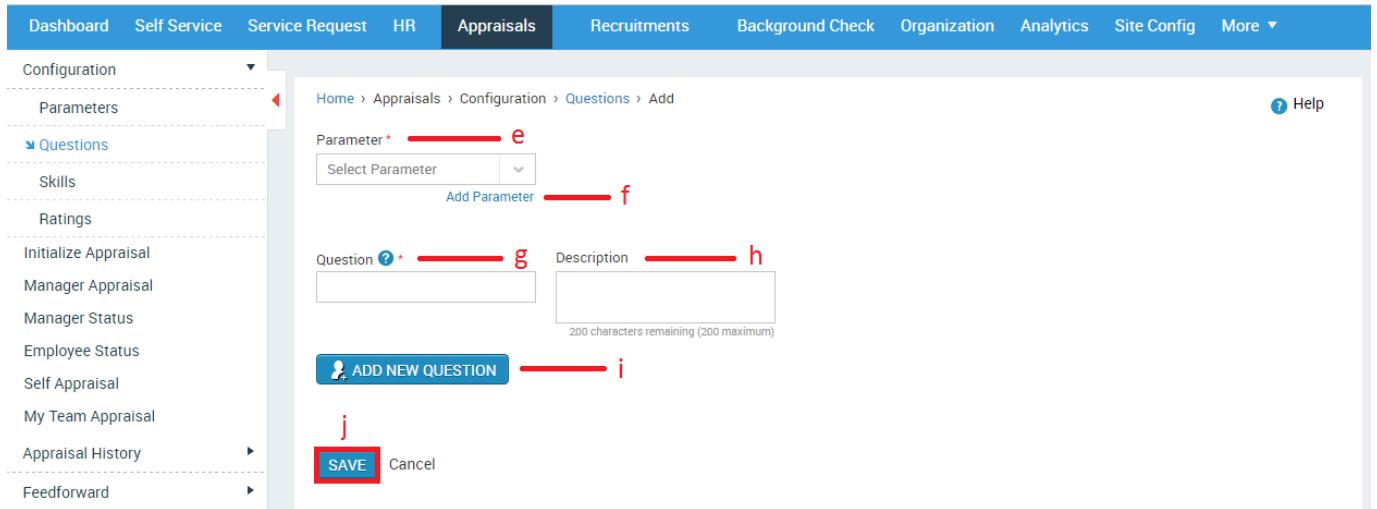


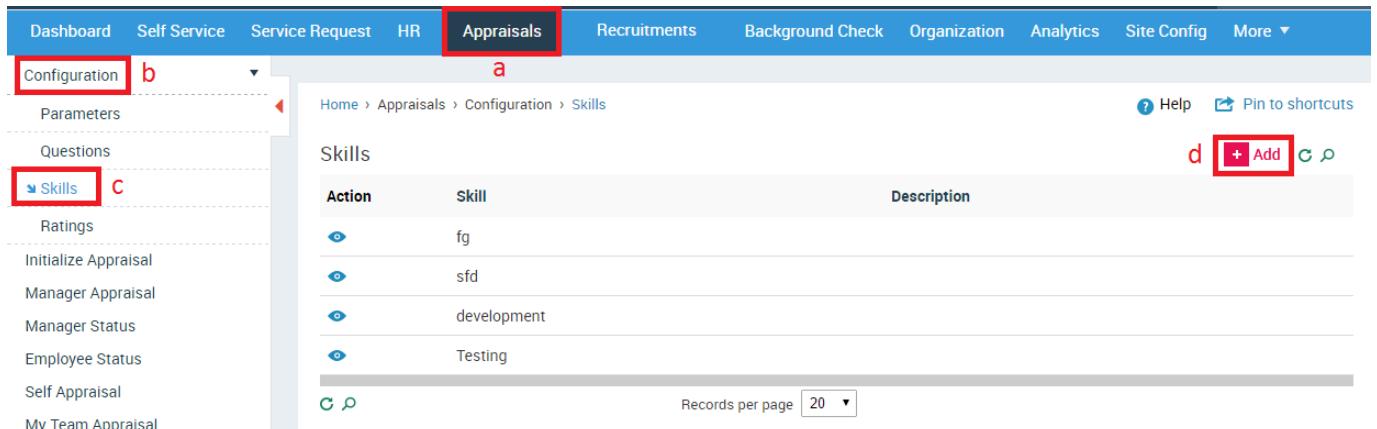
Figure 206

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

### 16.3 How do I add Skills?

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

Please refer Figure 207

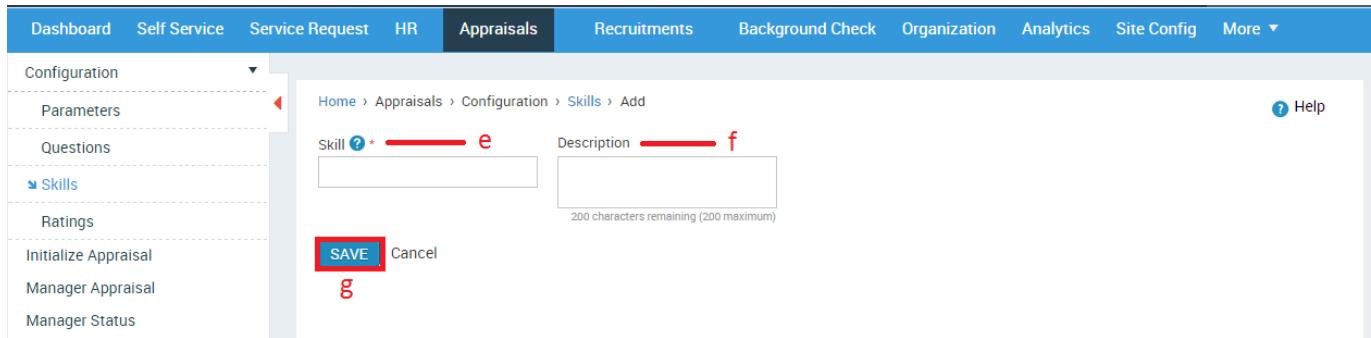


Action	Skill	Description
fg		
sfd		
development		
Testing		

Figure 207

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

Please refer Figure 208



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (which is the active tab), Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a vertical menu has 'Configuration' expanded, showing 'Parameters', 'Questions', 'Skills' (which is selected and highlighted with a red box 'a'), 'Ratings', 'Initialize Appraisal', 'Manager Appraisal', and 'Manager Status'. The main content area shows a breadcrumb path: Home > Appraisals > Configuration > Skills > Add. It contains fields for 'Skill' (with a required asterisk) and 'Description' (with a note of '200 characters remaining (200 maximum)'). A 'SAVE' button is at the bottom, and a 'Cancel' link is to its left. Red boxes labeled 'e', 'f', and 'g' point to the 'Skill' field, 'Description' field, and the 'SAVE' button respectively.

Figure 208

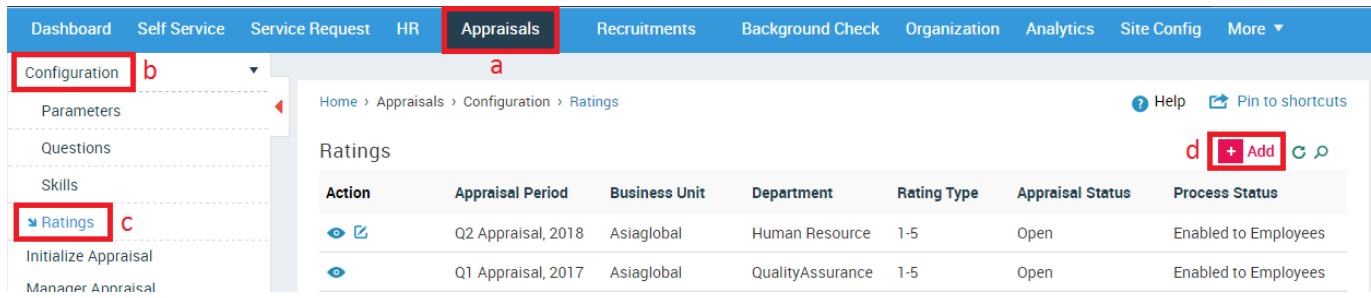
- e. Enter the skill
- f. Provide description if necessary
- g. Click **SAVE** button

## 16.4 How do I add Ratings?

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

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

Please refer Figure 209

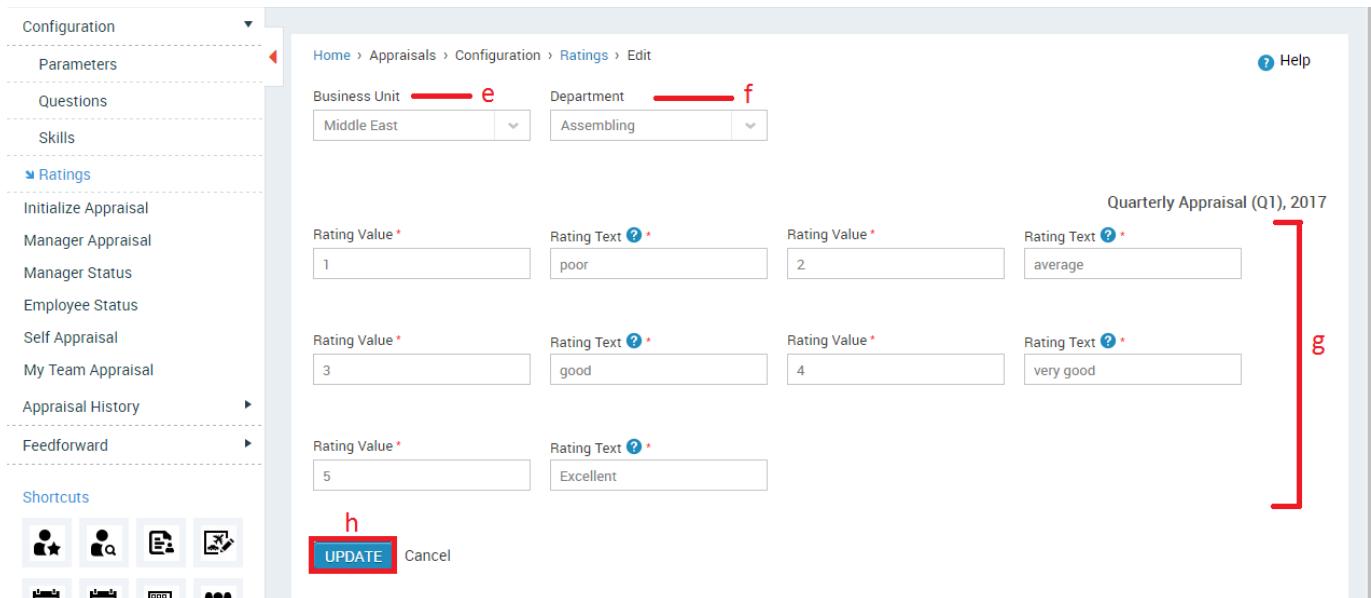


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (which is the active tab), Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a vertical menu has 'Configuration' selected and highlighted with a red box 'b'. The 'Skills' and 'Ratings' tabs are also highlighted with red boxes 'a' and 'c' respectively. The main content area shows a breadcrumb path: Home > Appraisals > Configuration > Ratings. It displays a table with columns: Action, Appraisal Period, Business Unit, Department, Rating Type, Appraisal Status, and Process Status. Two rows are listed: 'Q2 Appraisal, 2018' (Business Unit: Asiaglobal, Department: Human Resource, Rating Type: 1-5, Status: Open, Process Status: Enabled to Employees) and 'Q1 Appraisal, 2017' (Business Unit: Asiaglobal, Department: QualityAssurance, Rating Type: 1-5, Status: Open, Process Status: Enabled to Employees). A red box 'd' points to the edit icon in the first row's action column.

Figure 209

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

Please refer Figure 210



The screenshot shows the 'Configuration' section under 'Appraisals'. On the left, a sidebar lists various appraisal-related options. In the center, the 'Ratings' section is active, showing a grid for 'Quarterly Appraisal (Q1), 2017'. The grid has four columns: Rating Value and Rating Text for each of the first two rows, and Rating Value and Rating Text for the last two rows. A red bracket labeled 'g' groups the last two rows. A red box labeled 'h' covers the 'UPDATE' button at the bottom.

Rating Value *	Rating Text ? *	Rating Value *	Rating Text ? *
1	poor	2	average
3	good	4	very good
5	Excellent		

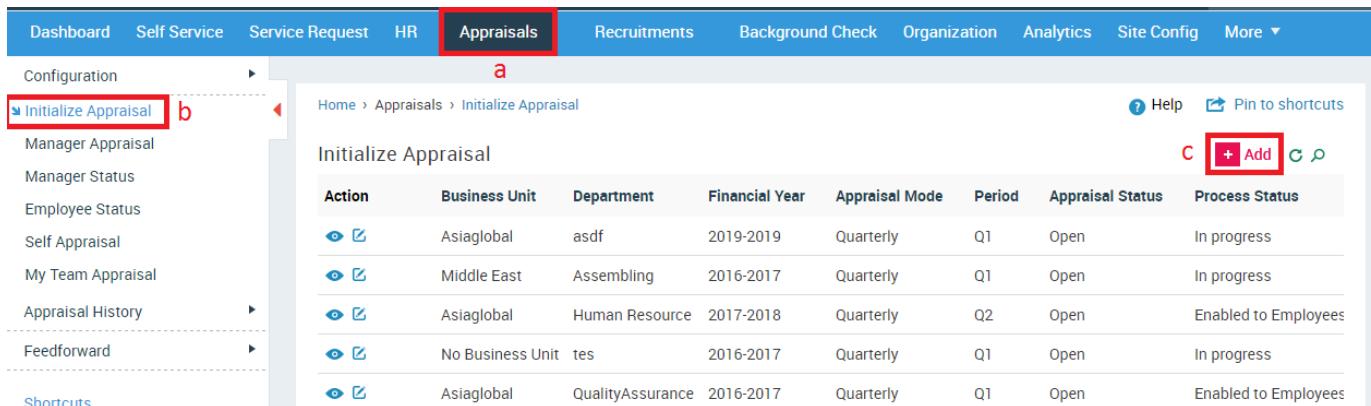
Figure 210

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

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

## 16.5 How do I Initialize an Appraisal process?

Please refer Figure 211



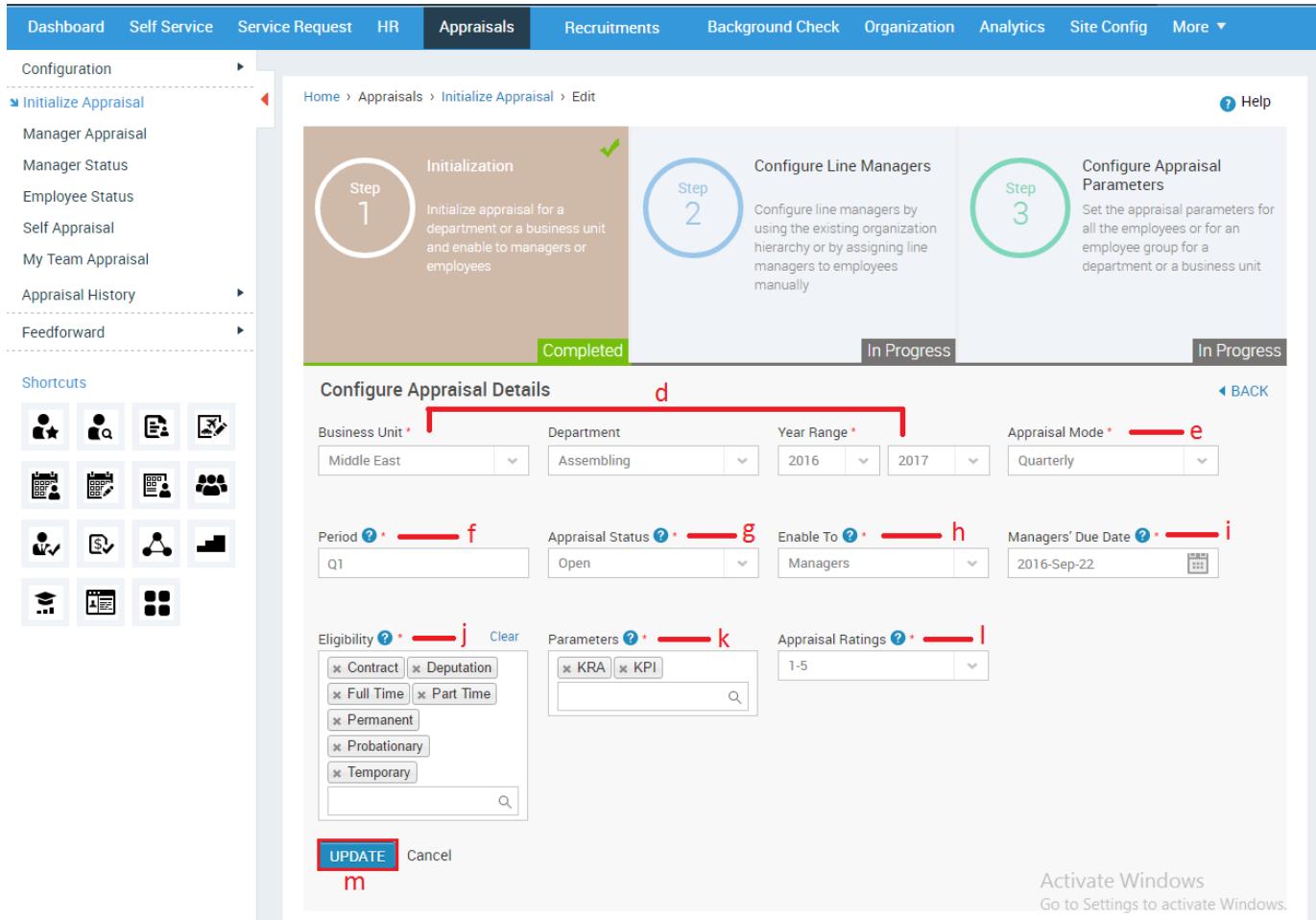
The screenshot shows the 'Appraisals' section under 'Configuration'. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals' (which is highlighted with a red box 'a'), 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. On the left, a sidebar lists 'Initialize Appraisal' (highlighted with a red box 'b') and other appraisal-related options. The main area displays a table titled 'Initialize Appraisal' with columns: Action, Business Unit, Department, Financial Year, Appraisal Mode, Period, Appraisal Status, and Process Status. Several rows are listed, and a red box 'c' highlights the '+Add' button in the top right of the table header.

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

Figure 211

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

Please refer Figure 212



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (which is the active tab), Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar menu is open under the 'Appraisals' section, showing 'Initialize Appraisal' as the current step. Below this are sections for Manager Appraisal, Manager Status, Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, and Feedforward. Under 'Shortcuts', there are several icons for quick access. The main content area displays a three-step process: Step 1 (Initialization) is completed (green checkmark), Step 2 (Configure Line Managers) is in progress (grey bar), and Step 3 (Configure Appraisal Parameters) is also in progress. The 'Configure Appraisal Details' form is open, showing fields for Business Unit (Middle East), Department (Assembling), Year Range (2016-2017), Appraisal Mode (Quarterly), Period (Q1), Appraisal Status (Open), Enable To (Managers), Managers' Due Date (2016-Sep-22), Eligibility criteria (Contract, Deputation, Full Time, Part Time, Permanent, Probationary, Temporary), Parameters (KRA, KPI), and Appraisal Ratings (1-5). A red box labeled 'd' highlights the business unit selection field. Red boxes labeled 'e' through 'm' highlight various other form fields: 'e' is the appraisal mode dropdown; 'f' is the period dropdown; 'g' is the appraisal status dropdown; 'h' is the enable to dropdown; 'i' is the managers' due date; 'j' is the eligibility criteria list; 'k' is the parameters list; 'l' is the appraisal ratings dropdown; 'm' is the 'UPDATE' button.

Figure 212

## Step 1: Initialization

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

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

Please refer Figure 213

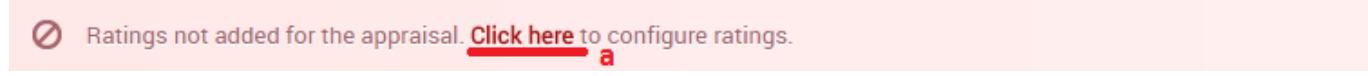


Figure 213

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

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

## Step 2: Configure Line Managers

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

The Line Managers can be configured in two ways:

### 1. Choose by Organization Hierarchy

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

Please refer Figure 214

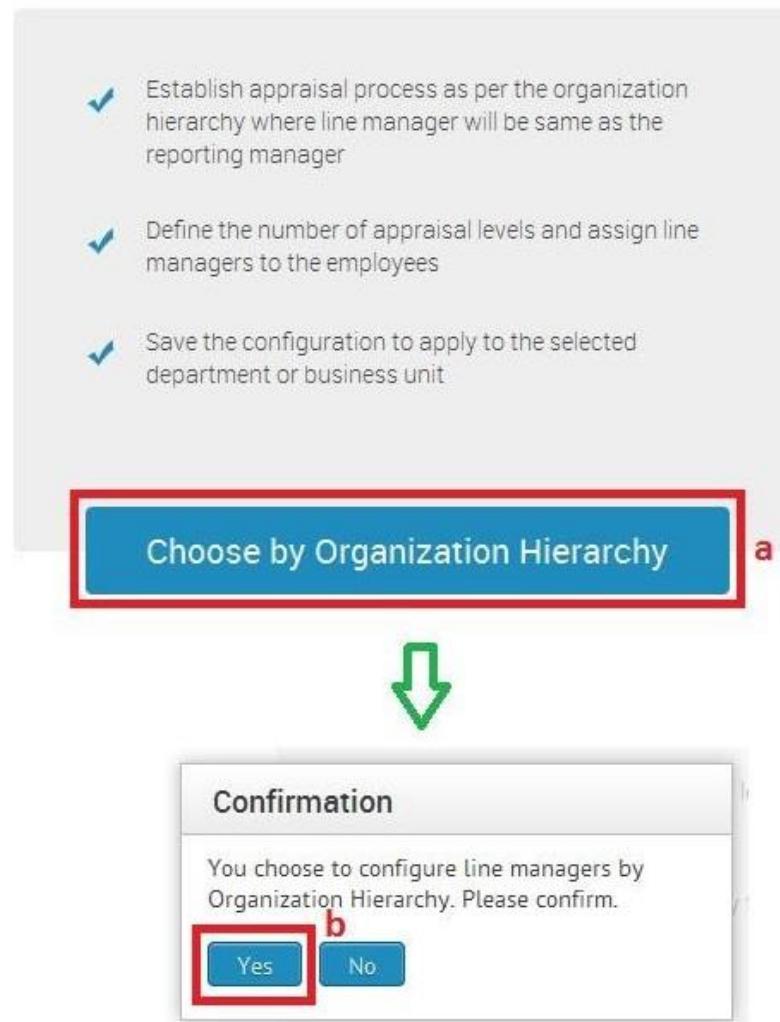


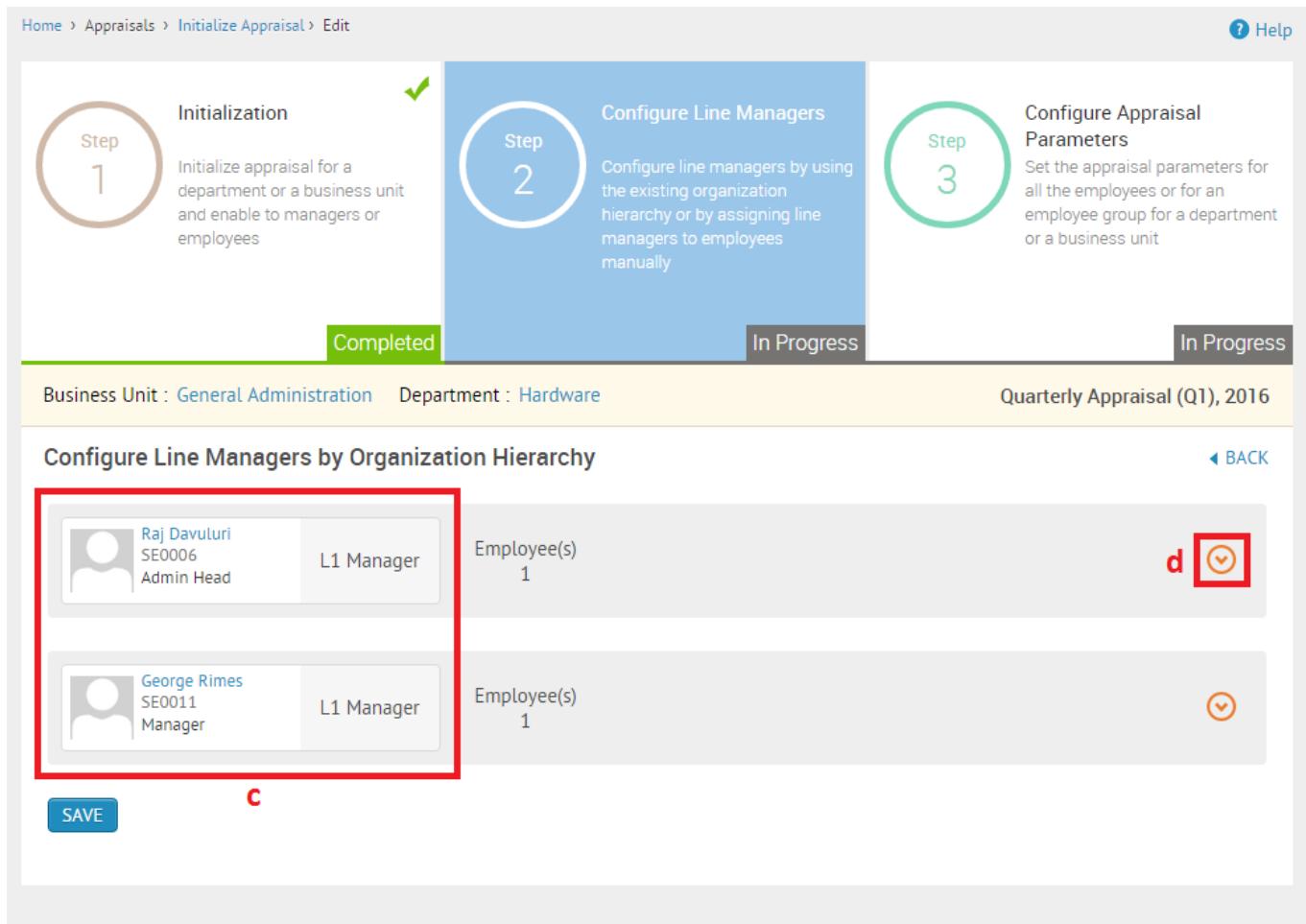
Figure 214

- Click **Choose by Organization Hierarchy** button

A small confirmation window will appear.

- Click **Yes** button

Please refer Figure 215



Home > Appraisals > Initialize Appraisal > Edit

Help

Step 1 Initialization  
Initialize appraisal for a department or a business unit and enable to managers or employees

Step 2 Configure Line Managers  
Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually

Step 3 Configure Appraisal Parameters  
Set the appraisal parameters for all the employees or for an employee group for a department or a business unit

Completed In Progress In Progress

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

Configure Line Managers by Organization Hierarchy ◀ BACK

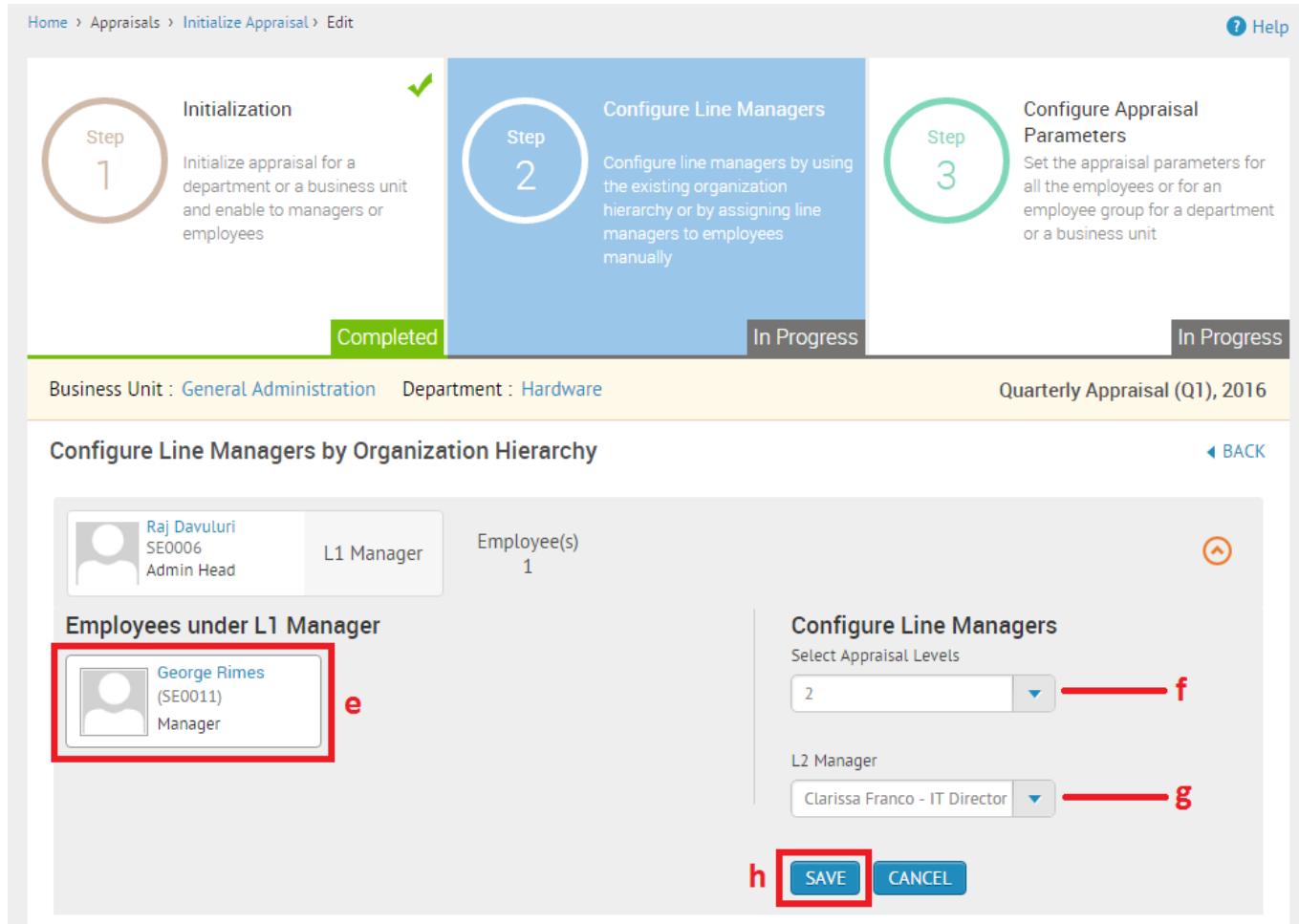
 Raj Davuluri SE0006 Admin Head	L1 Manager  Employee(s) 1	<span style="color: red;">d</span> 
 George Rimes SE0011 Manager	L1 Manager  Employee(s) 1	

**C** SAVE

Figure 215

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

Please refer Figure 216



Home > Appraisals > Initialize Appraisal > Edit

Step 1 Initialization  
Step 2 Configure Line Managers  
Step 3 Configure Appraisal Parameters

Completed In Progress In Progress

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

Configure Line Managers by Organization Hierarchy ◀ BACK

Raj Davuluri SE0006 Admin Head L1 Manager Employee(s) 1

Employees under L1 Manager

George Rimes (SE0011) Manager

Configure Line Managers  
Select Appraisal Levels  
2

L2 Manager  
Clarissa Franco - IT Director

**e** **f** **g** **h** **SAVE** CANCEL

Figure 216

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



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

## 2. Assign Line Managers to Employees

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

Please refer Figure 217

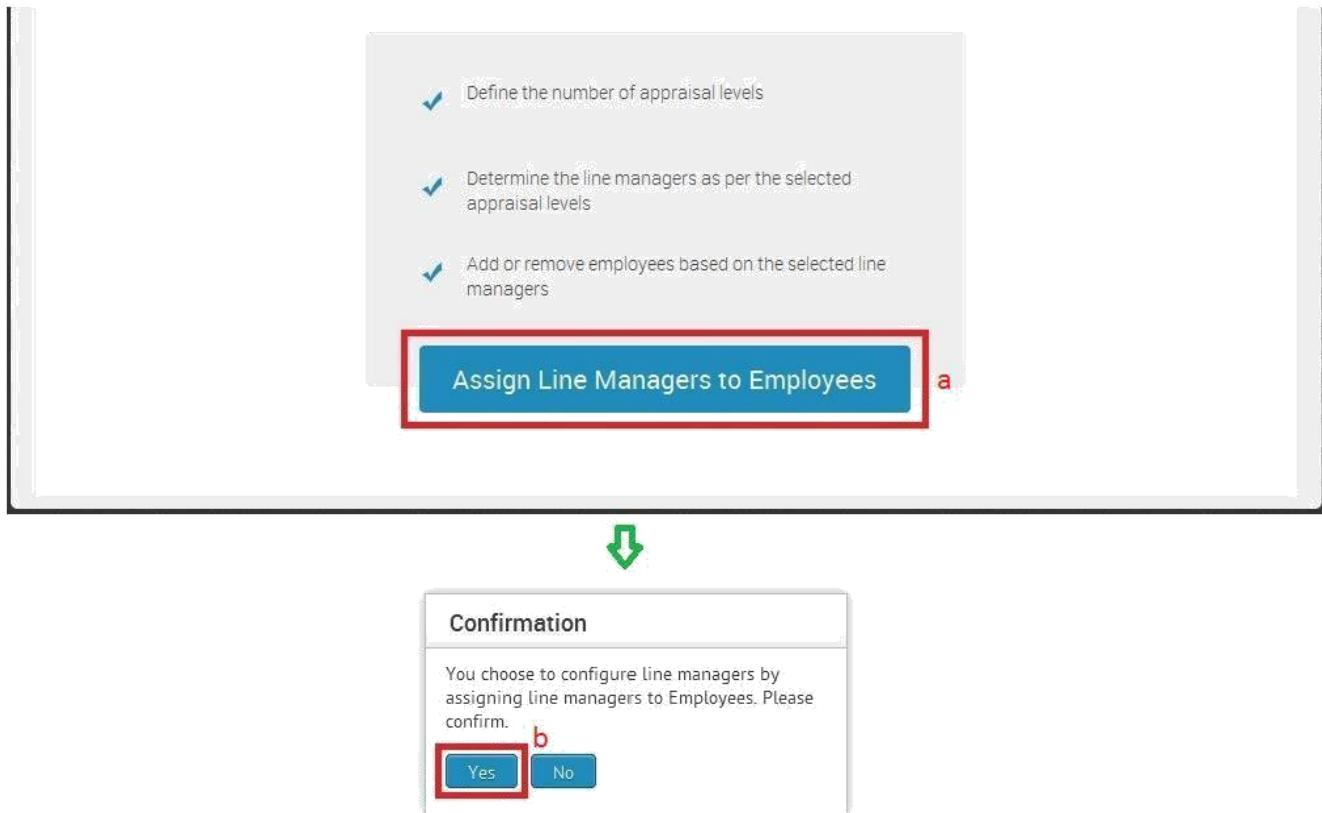


Figure 217

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

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 218

Home > Appraisals > Initialize Appraisal > Edit

Help

Step 1 Initialization Completed Step 2 Configure Line Managers In Progress Step 3 Configure Appraisal Parameters In Progress

Business Unit : Brooklyn Department : IT Quarterly Appraisal (Q1), 2015

Configure Line Managers [BACK](#)

+Add Line Managers **c**

Select Appraisal Levels **d**  
2

L1 Manager L2 Manager  
Micheal John Jim Carol **e**

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

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

**h** SAVE Cancel

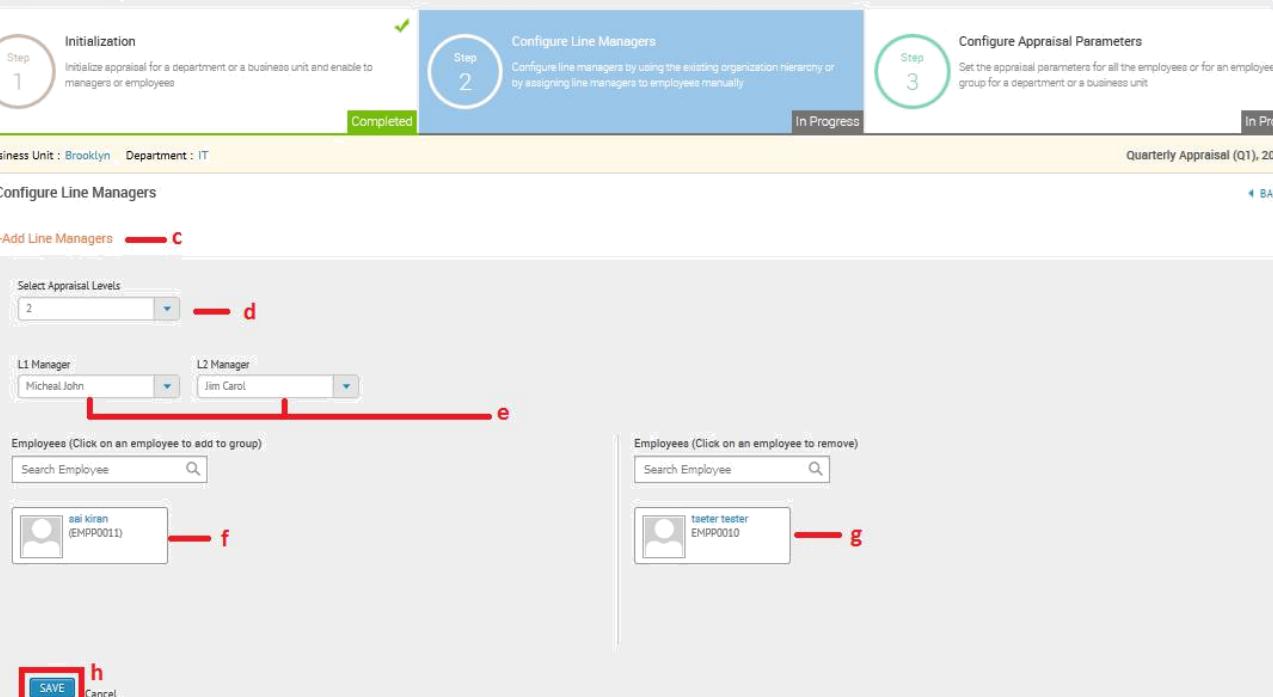


Figure 218

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

## Step 3: Configure Appraisal Parameters

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

### 1. All Employees

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

Please refer Figure 219

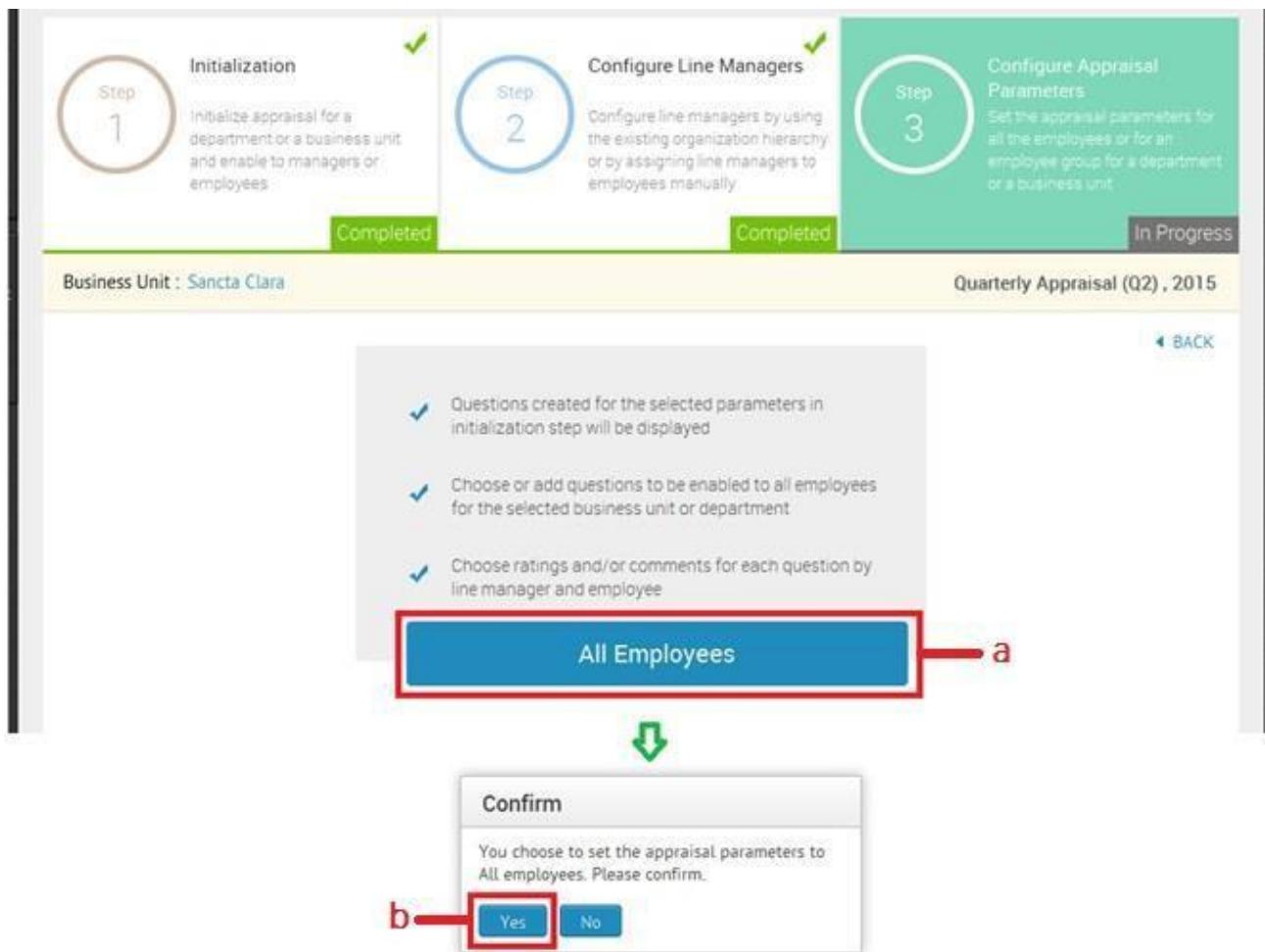


Figure 219

a. Click **All Employees**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 220

Home > Appraisals > Initialize Appraisal > Edit Help

Step 1 Initialization ✓ Completed

Step 2 Configure Line Managers ✓ Completed

Step 3 Configure Appraisal Parameters ✓ In Progress

Business Unit : Brooklyn Department : IT Quarterly Appraisal (Q1), 2015

Configure Questions For All Employees ◀ BACK

All | Selected g + Add New Question

Questions	Manager Comments	Manager Ratings
<input checked="" type="checkbox"/> d	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Employee Comments	<input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Ratings
<input checked="" type="checkbox"/> c	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Employee Comments	<input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Ratings
<input checked="" type="checkbox"/> h	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Employee Comments	<input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Ratings

SAVE & INITIALIZE SAVE & INITIALIZE LATER DISCARD

Figure 220

- c. Select Questions individually by checking the checkbox respective to each question  
**Or**
- d. Select all the questions by checking the **Check All** option in the table header
- e. Enable Manager/Employee Comments or Manager/Employee Ratings for a specific question. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
- f. Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
- g. Click **+Add New Question** option to add more questions to the appraisal process
- h. Click **SAVE & INITIALIZE** button to initialize the appraisal
- i. Click **SAVE & INITIALIZE LATER** button to only save the appraisal details

## 2. Customized Employee Groups

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

Please refer Figure 222

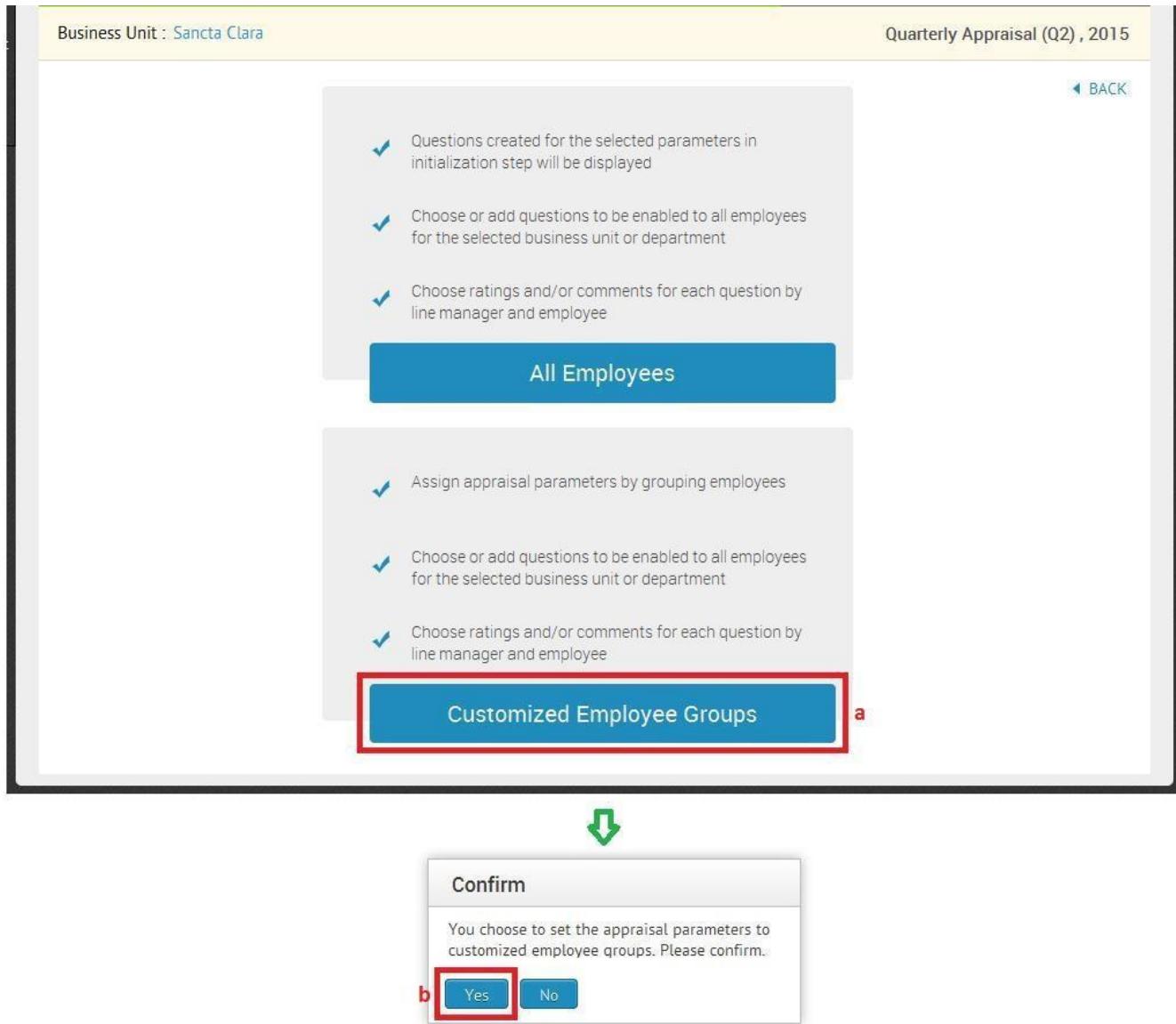


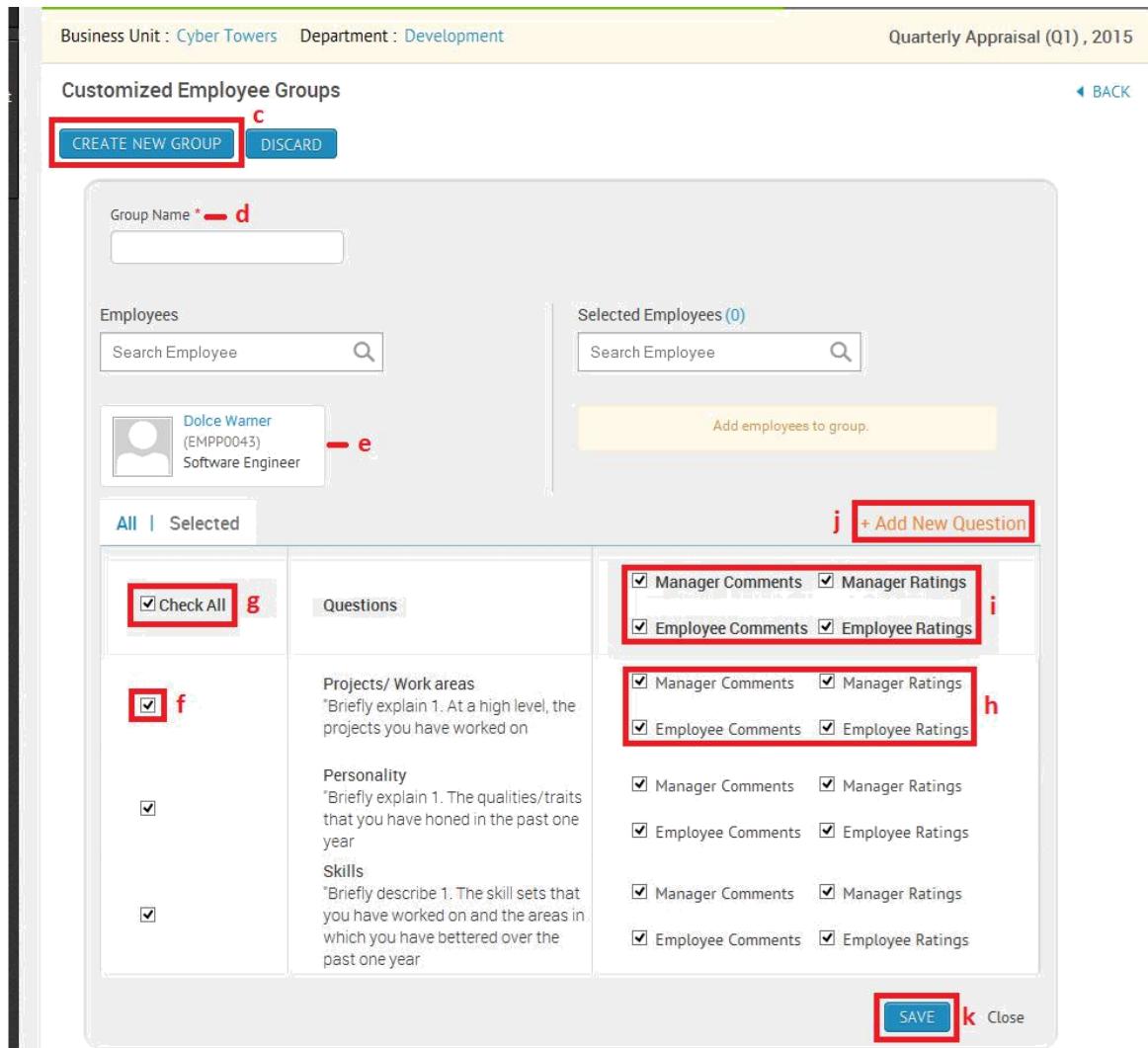
Figure 222

- Click **Customized Employee Groups**

A small confirmation window will open

- Click **Yes** button

Please refer Figure 223



Business Unit : Cyber Towers Department : Development

Quarterly Appraisal (Q1), 2015

**Customized Employee Groups**

**c** CREATE NEW GROUP   **DISCARD**

Group Name \* **d**

Employees

Search Employee

Dolce Warner (EMPP0043)  
Software Engineer **e**

Selected Employees (0)

Search Employee

Add employees to group.

All | Selected

**j** + Add New Question

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

**k** SAVE   Close

Figure 223

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

Or

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

Or

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

Please refer Figure 224

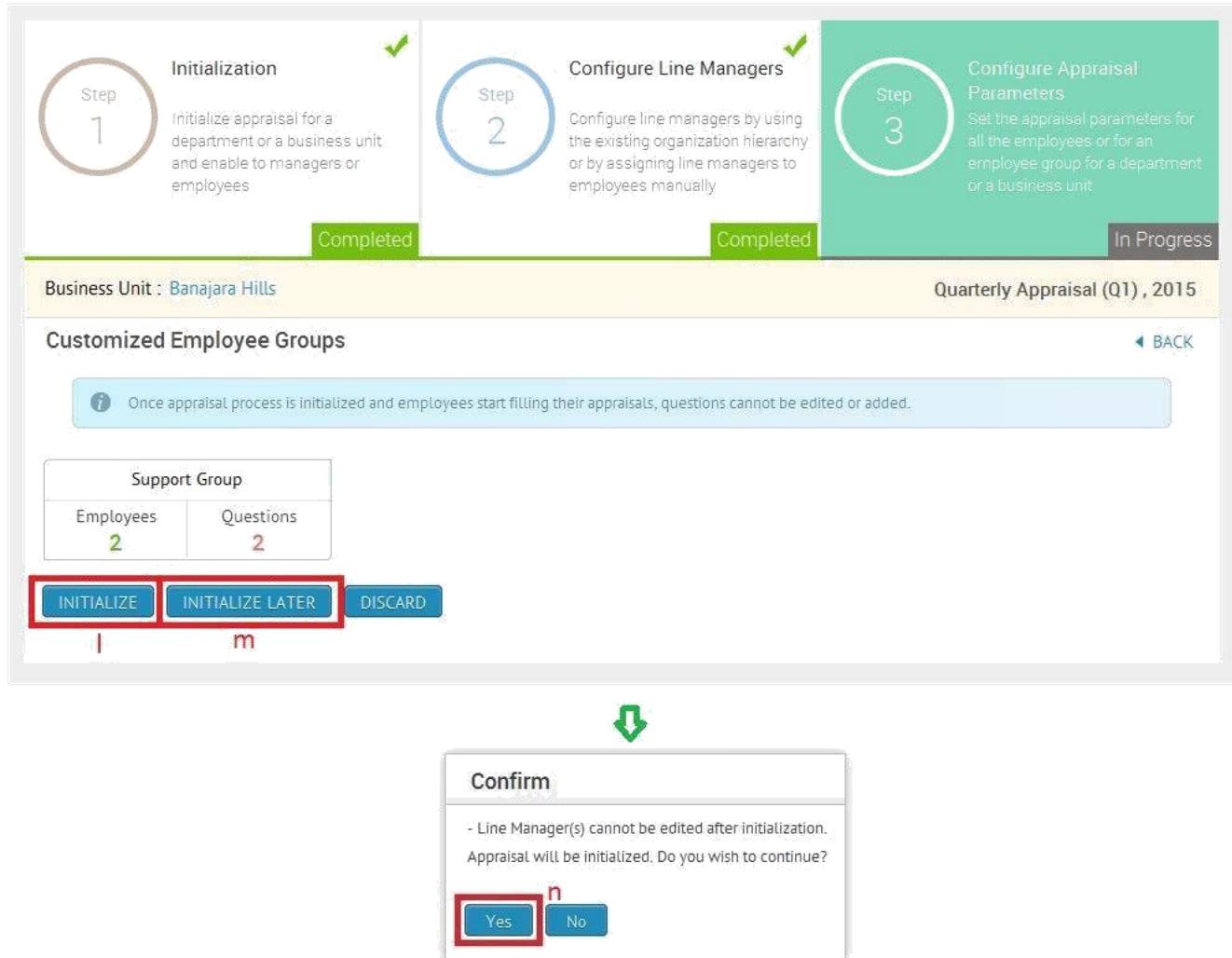


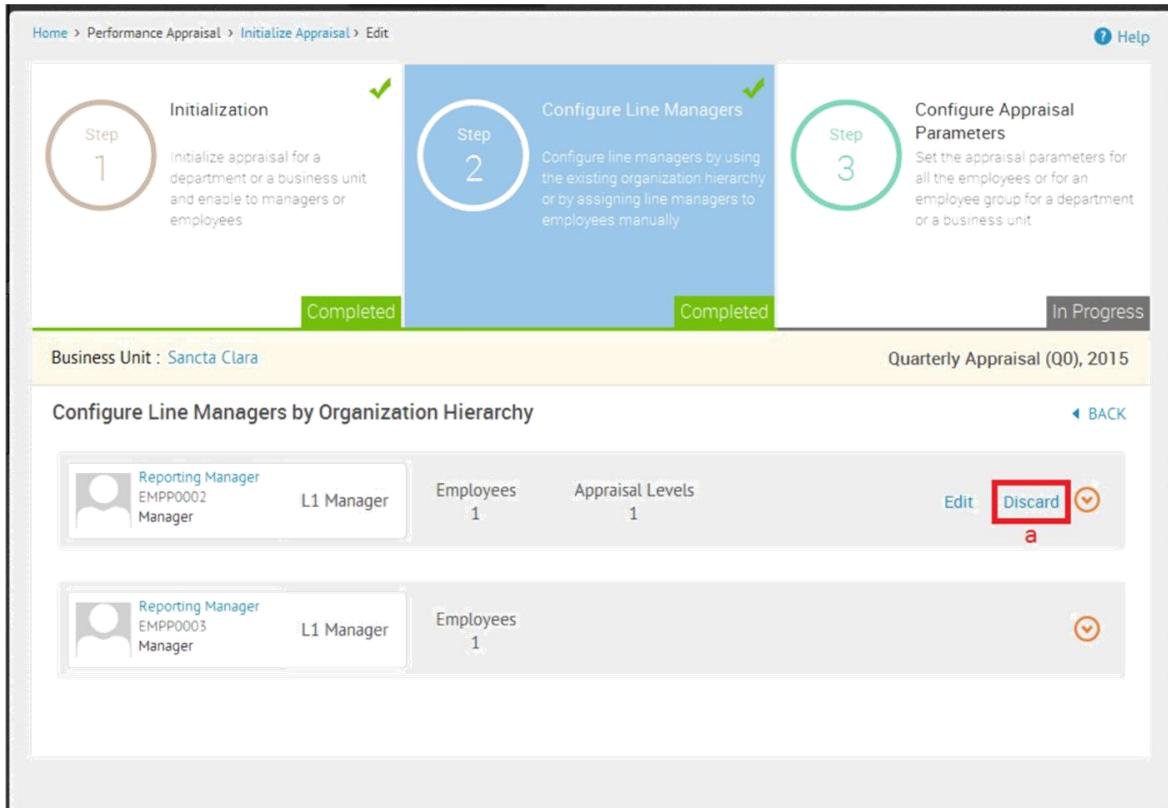
Figure 224

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

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

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

Please refer Figure 224



OR

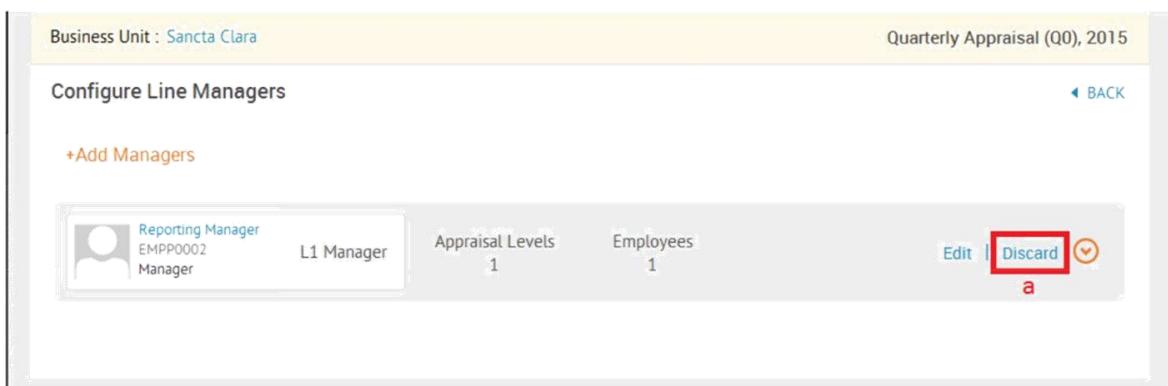


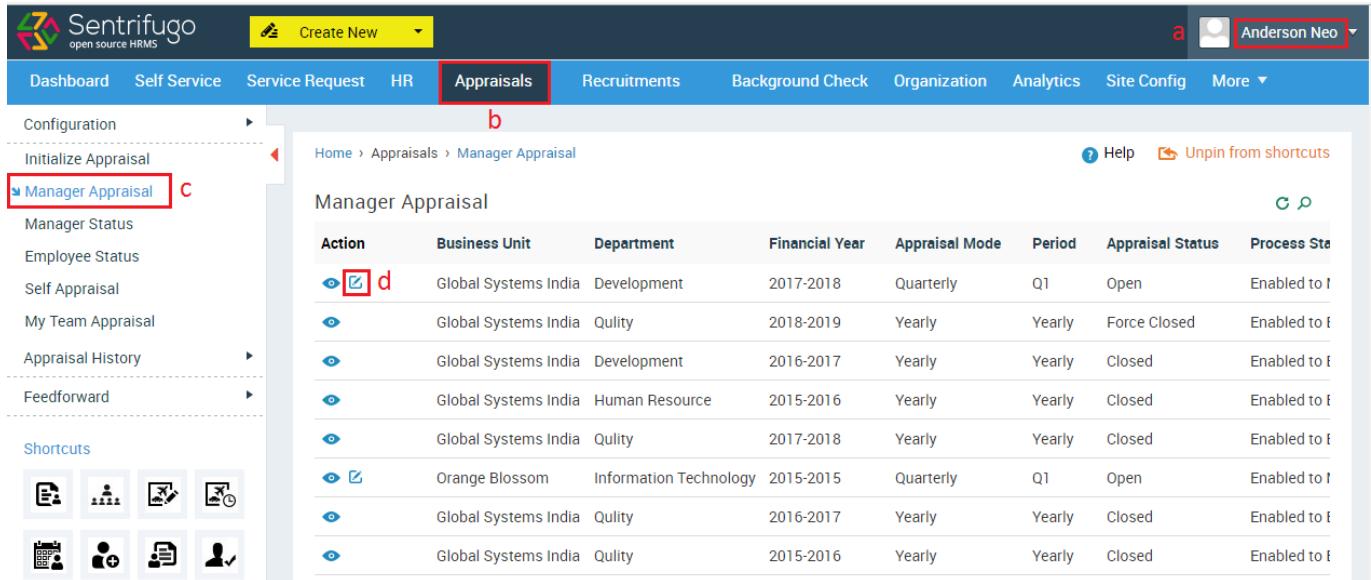
Figure 224

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

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

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

Please refer Figure 225



The screenshot shows the Sentrifugo open source HRMS application. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (which is highlighted with a red box), Recruitments, Background Check, Organization, Analytics, Site Config, and More. A user profile for Anderson Neo is visible on the right. The left sidebar has sections for Configuration, Initialize Appraisal, Manager Appraisal (which is also highlighted with a red box), Manager Status, Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, and Feedforward. Below these are Shortcuts with icons for Home, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The main content area is titled 'Manager Appraisal' (labeled 'b'). It shows a list of appraisal processes (labeled 'd') with columns for Action, Business Unit, Department, Financial Year, Appraisal Mode, Period, Appraisal Status, and Process Status. The processes listed are:

Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
	Global Systems India	Development	2017-2018	Quarterly	Q1	Open	Enabled to 1
	Global Systems India	Quality	2018-2019	Yearly	Yearly	Force Closed	Enabled to 1
	Global Systems India	Development	2016-2017	Yearly	Yearly	Closed	Enabled to 1
	Global Systems India	Human Resource	2015-2016	Yearly	Yearly	Closed	Enabled to 1
	Global Systems India	Quality	2017-2018	Yearly	Yearly	Closed	Enabled to 1
	Orange Blossom	Information Technology	2015-2015	Quarterly	Q1	Open	Enabled to 1
	Global Systems India	Quality	2016-2017	Yearly	Yearly	Closed	Enabled to 1
	Global Systems India	Quality	2015-2016	Yearly	Yearly	Closed	Enabled to 1

Figure 225

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

Please refer Figure 226

### Initialization Details

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

### Group Details

[CREATE NEW GROUP](#)
[SUBMIT INITIALIZATION](#)

Group Name \*

e

Selected Employees (0)

g

Employees

Search Employee
🔍

 Employee 1  
(EMPP0029)  
Software Engineer

f

Selected Employees (0)

Search Employee
🔍

 Employee 8  
(EMPP0029)  
Software Engineer

### Configure Appraisal Parameters for All Employees

All | Selected
+ Add New Question
h

Questions	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="flex: 1;"> <input checked="" type="checkbox"/> Check All           </div> <div style="flex: 1;"> <input checked="" type="checkbox"/> Manager Comments   <input checked="" type="checkbox"/> Manager Ratings  <input checked="" type="checkbox"/> Employee Comments   <input checked="" type="checkbox"/> Employee Ratings           </div> </div>
New Technologies/skills learn and implemented What are the new technologies/skills you explored and implemented?	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings
Responsibility Have you taken complete ownership of the task/project/product assigned to you?	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings

SAVE
Close
i
j
k

Figure 226

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Page 190 of 236

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

**Or**

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

**Or**

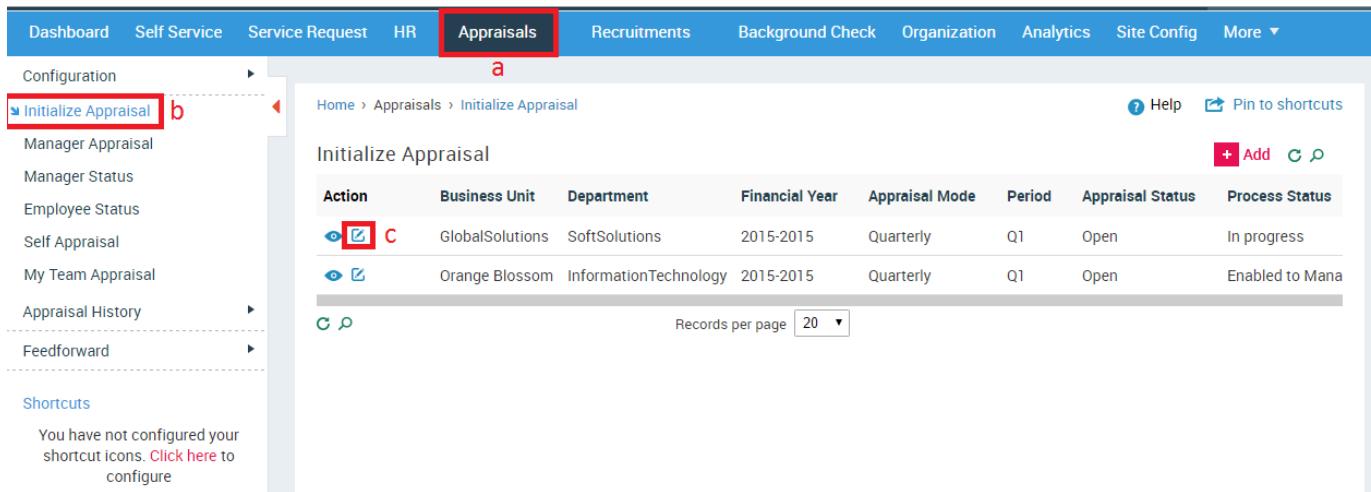
- k. Select Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
- l. Click **SAVE** button

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

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

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

*Please refer Figure 227*

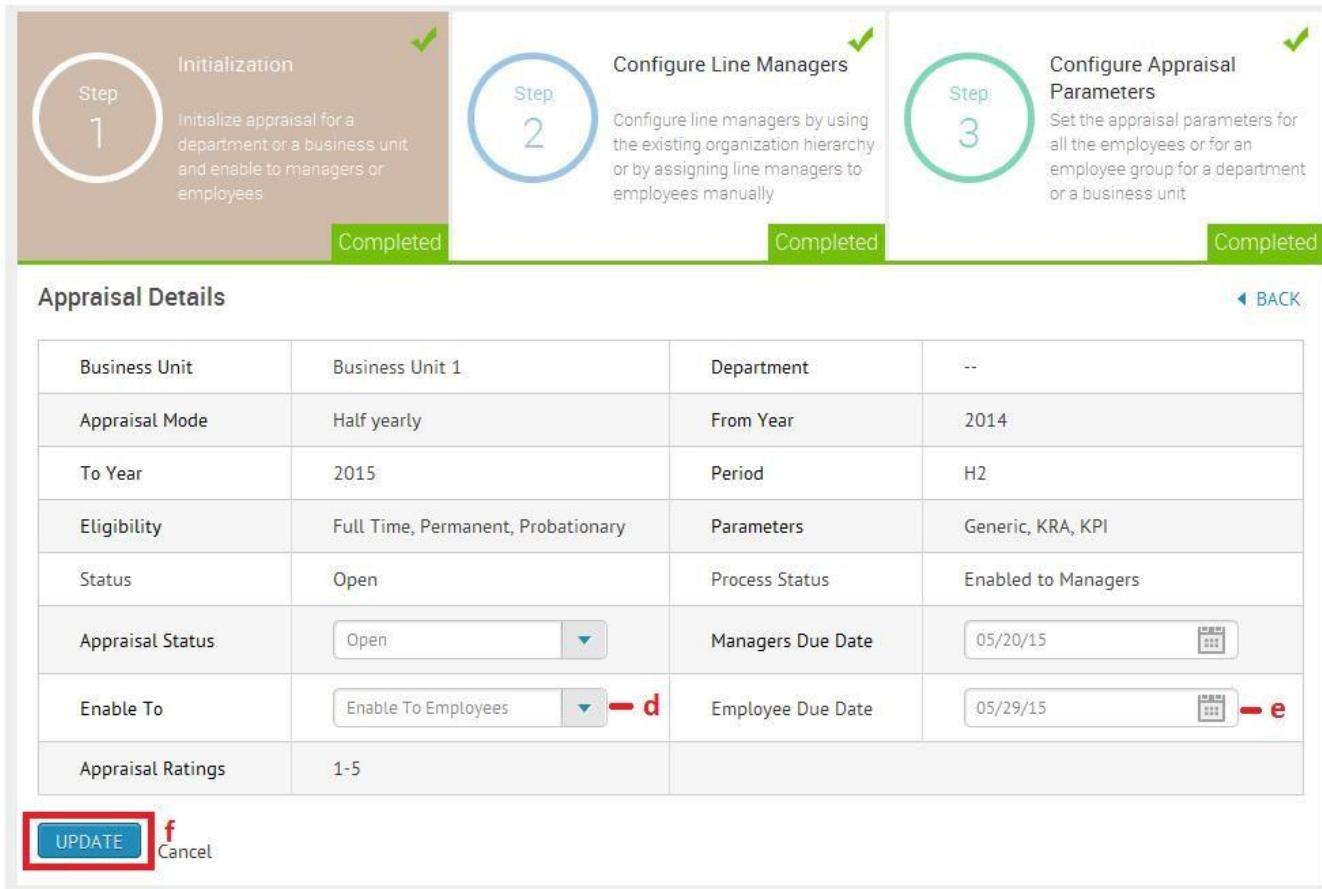


Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
<input checked="" type="checkbox"/> C	GlobalSolutions	SoftSolutions	2015-2015	Quarterly	Q1	Open	In progress
<input checked="" type="checkbox"/>	Orange Blossom	InformationTechnology	2015-2015	Quarterly	Q1	Open	Enabled to Mana

Figure 227

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

Please refer Figure 228



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

◀ BACK

**UPDATE** f Cancel

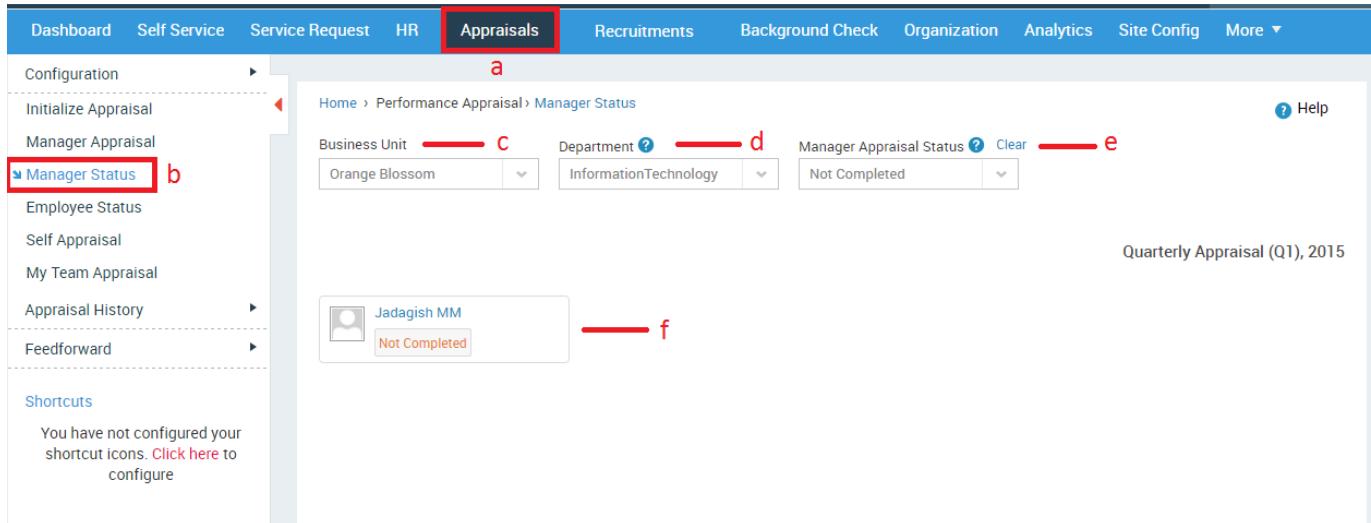
Figure 229

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

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

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

Please refer Figure 230



The screenshot shows the Sentrifugo HRMS application interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (which is highlighted in red), Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar menu lists Configuration, Initialize Appraisal, Manager Appraisal, Manager Status (selected and highlighted in red), Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, Feedforward, and Shortcuts. The main content area shows a breadcrumb path: Home > Performance Appraisal > Manager Status. It features three dropdown filters: Business Unit (Orange Blossom), Department (InformationTechnology), and Manager Appraisal Status (Not Completed). Below these filters, a section titled "Quarterly Appraisal (Q1, 2015)" displays a list of managers with their status. One entry is shown: "Jadagish MM" with the status "Not Completed". Red arrows labeled a through f point to specific UI elements: 'a' points to the 'Appraisals' menu item, 'b' points to the 'Manager Status' sidebar item, 'c' points to the 'Business Unit' filter, 'd' points to the 'Department' filter, 'e' points to the 'Manager Appraisal Status' filter, and 'f' points to the manager list entry.

Figure 230

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

## 16.10 How do I provide Self Appraisal?

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

Please refer Figure 231

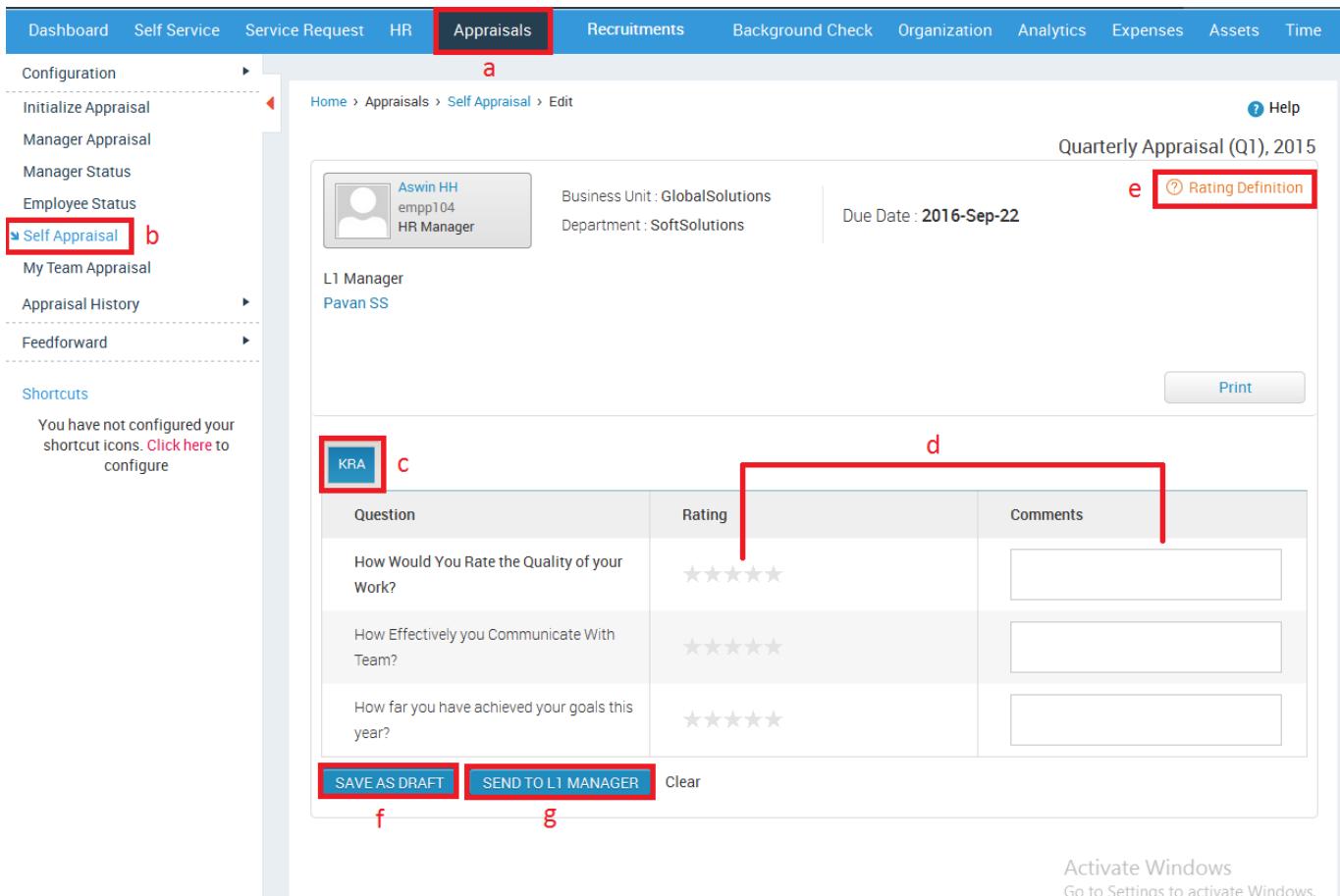


Figure 231

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

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

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

Please refer Figure 232

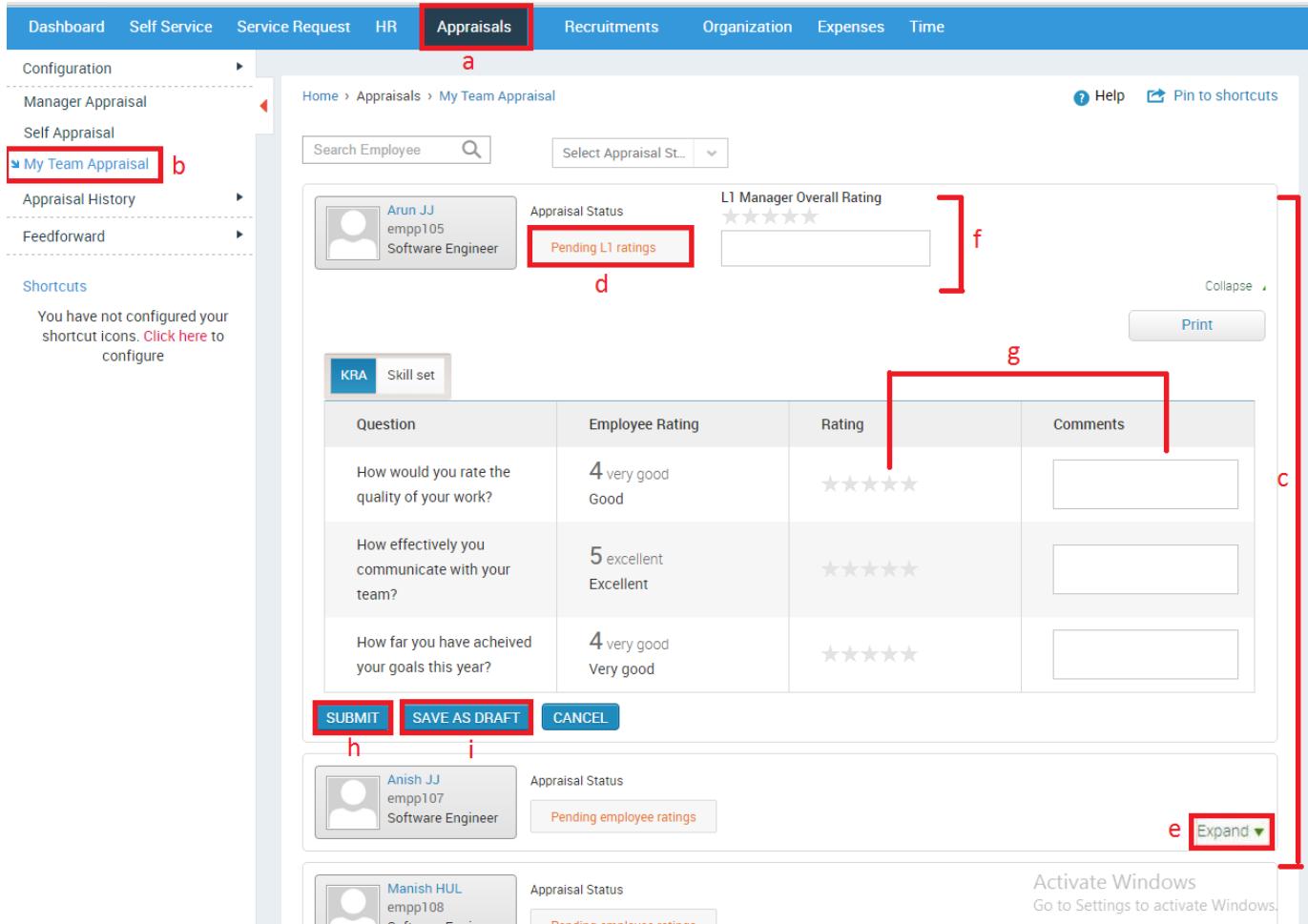


Figure 232

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

## 16.12 How do I check Employee Status?

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

Please refer Figure 233

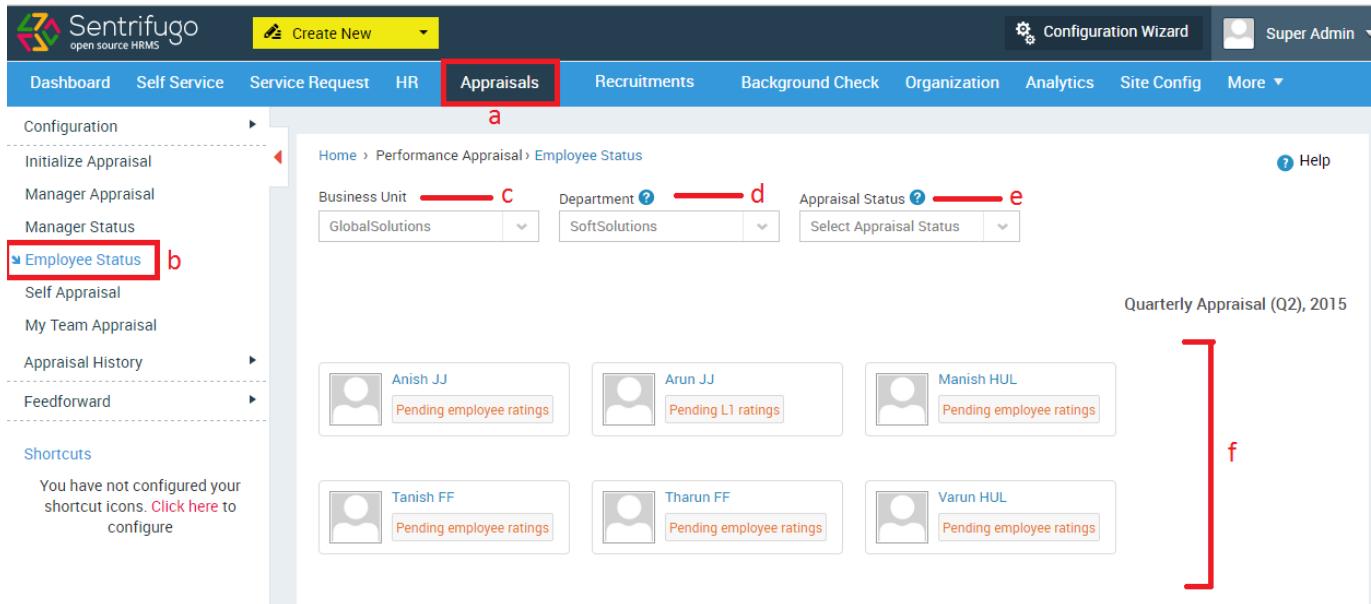


Figure 233

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

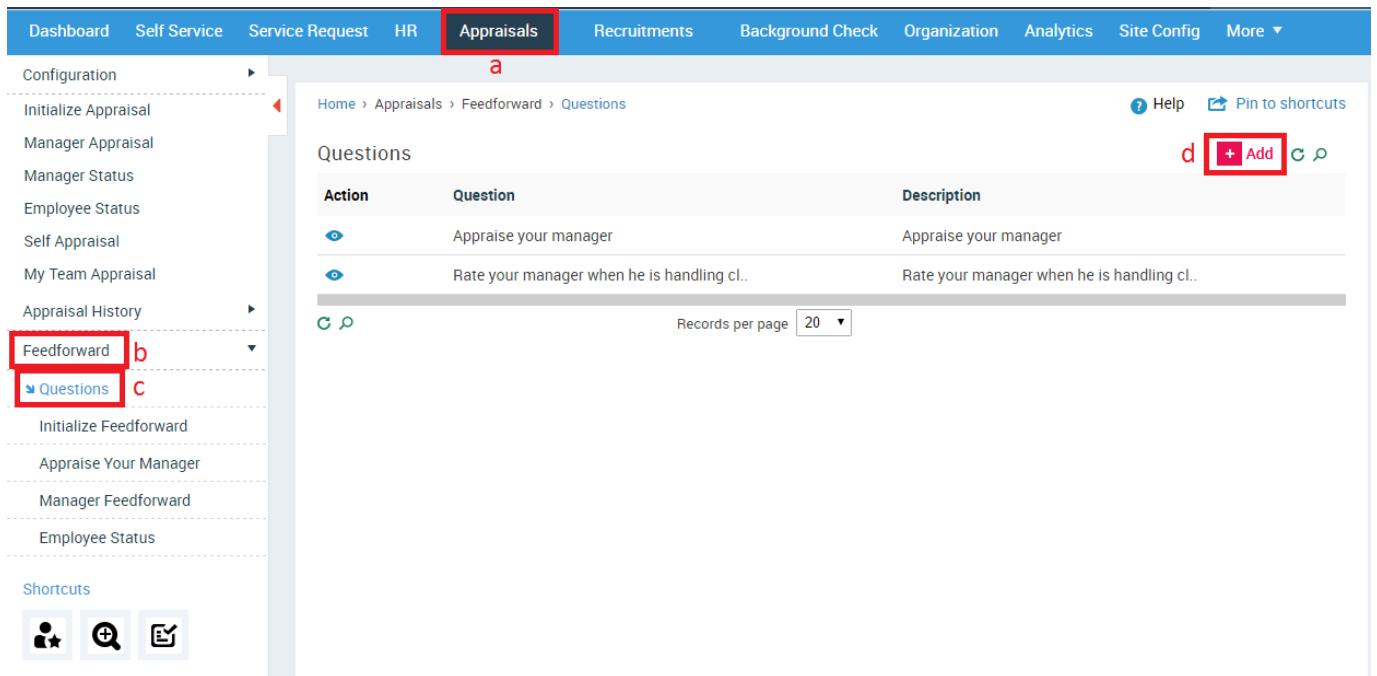
## 16.13 What is Feedforward?

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

## 16.14 How do I add Questions for Feedforward?

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

Please refer Figure 234

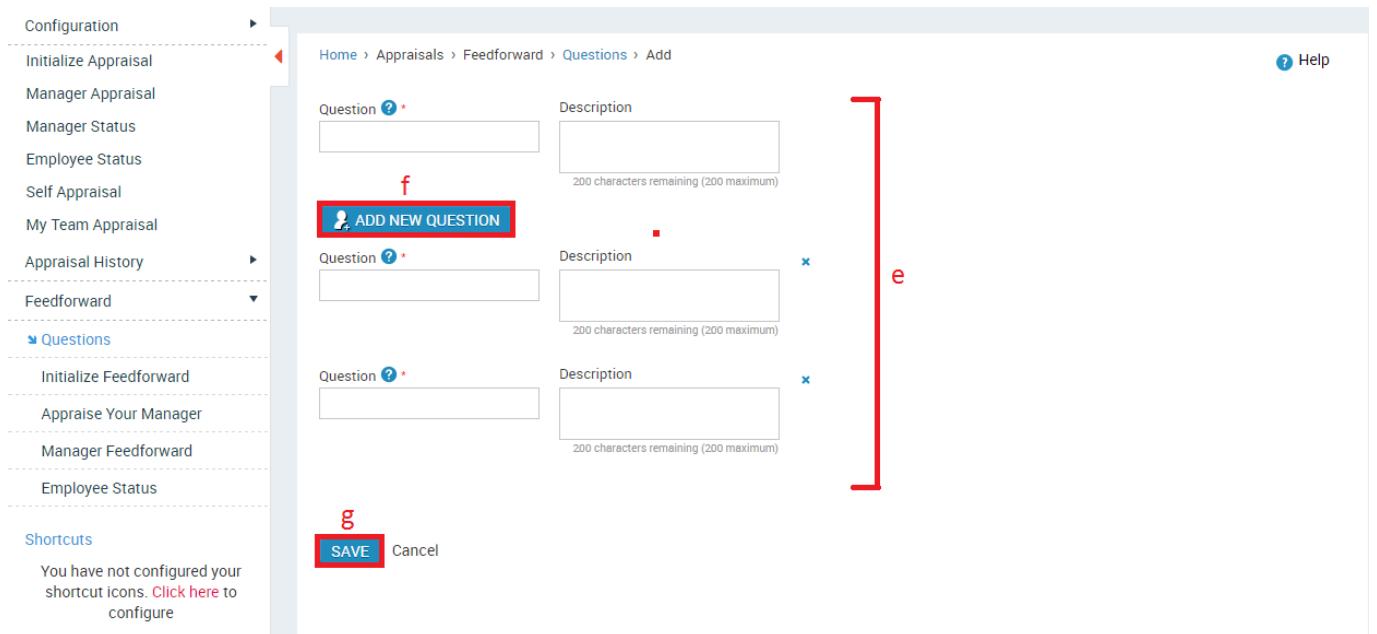


The screenshot shows the Sentrifugo interface with the following navigation path: Home > Appraisals > Feedforward > Questions. The top menu bar includes Dashboard, Self Service, Service Request, HR, Appraisals (highlighted with a red box), Recruitments, Background Check, Organization, Analytics, Site Config, and More. The left sidebar has sections for Configuration, Appraisal History, Feedforward (highlighted with a red box), Questions (highlighted with a red box), and Shortcuts. The main content area displays a table titled 'Questions' with columns for Action, Question, and Description. Two rows are listed: 'Appraise your manager' and 'Rate your manager when he is handling cl..'. A red box highlights the '+ Add' button in the top right corner of the table header. Other UI elements include a 'Help' link, a 'Pin to shortcuts' icon, and a records per page dropdown set to 20.

Figure 234

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

Please refer Figure 235



The screenshot shows the 'Add Question' form within the Sentrifugo interface. The path is Home > Appraisals > Feedforward > Questions > Add. The left sidebar is identical to Figure 234. The main form has two input fields: 'Question ? \*' and 'Description'. Below these is a red box labeled 'f' containing the button 'ADD NEW QUESTION'. A red bracket labeled 'e' groups three identical question input structures below it. Each structure consists of 'Question ? \*' and 'Description' fields with a 'x' icon to delete. At the bottom are 'SAVE' and 'Cancel' buttons, with a red box labeled 'g' highlighting the 'SAVE' button.

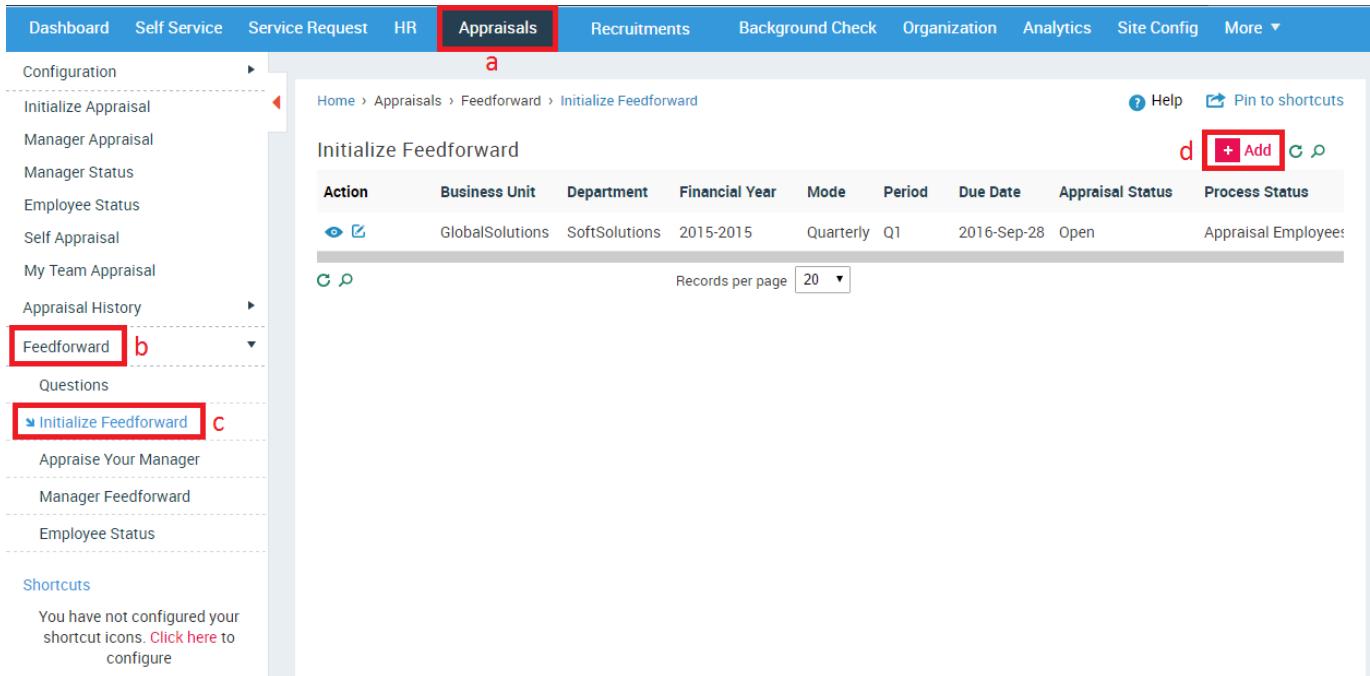
Figure 235

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

## 16.15 How do I initialize Feedforward?

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

Please refer Figure 236

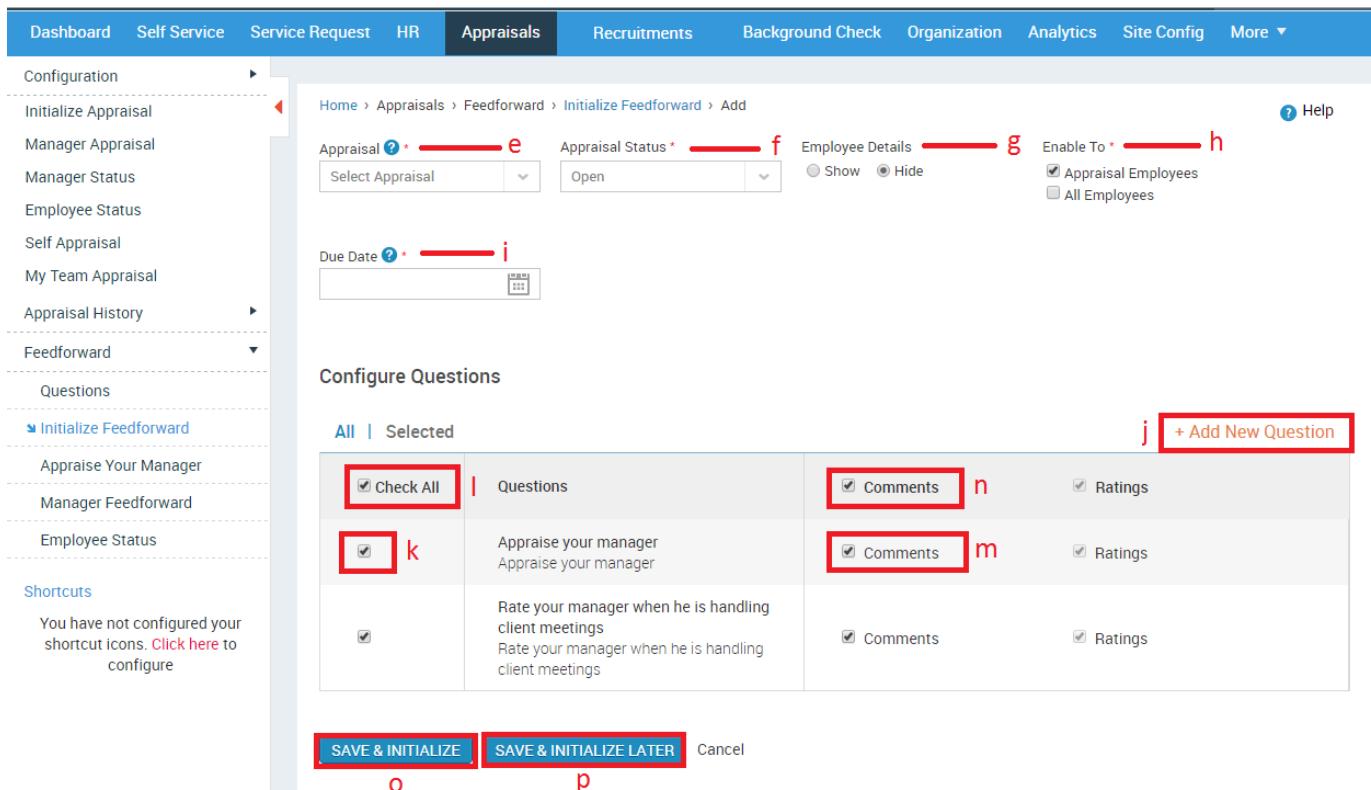


Action	Business Unit	Department	Financial Year	Mode	Period	Due Date	Appraisal Status	Process Status
	GlobalSolutions	SoftSolutions	2015-2015	Quarterly	Q1	2016-Sep-28	Open	Appraisal Employees

Figure 236

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

Please refer Figure 237



Configuration

Initialize Appraisal

Manager Appraisal

Manager Status

Employee Status

Self Appraisal

My Team Appraisal

Appraisal History

Feedforward

Questions

Initialize Feedforward

Appraise Your Manager

Manager Feedforward

Employee Status

Shortcuts

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

Home > Appraisals > Feedforward > Initialize Feedforward > Add

Appraisal ? \* e Appraisal Status \* f Employee Details g Enable To \* h

Select Appraisal Open Show Hide

Due Date ? \* i

Configure Questions

All | Selected j + Add New Question

	Questions	Comments n	Ratings
<input checked="" type="checkbox"/> k	Appraise your manager Appraise your manager	<input checked="" type="checkbox"/> m	<input checked="" type="checkbox"/> Ratings
<input checked="" type="checkbox"/>	Rate your manager when he is handling client meetings Rate your manager when he is handling client meetings	<input checked="" type="checkbox"/> Comments	<input checked="" type="checkbox"/> Ratings

SAVE & INITIALIZE o SAVE & INITIALIZE LATER p Cancel

Figure 237

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

Or

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

Or

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

## 16.16 How do I Appraise my Manager?

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

Please refer Figure 238

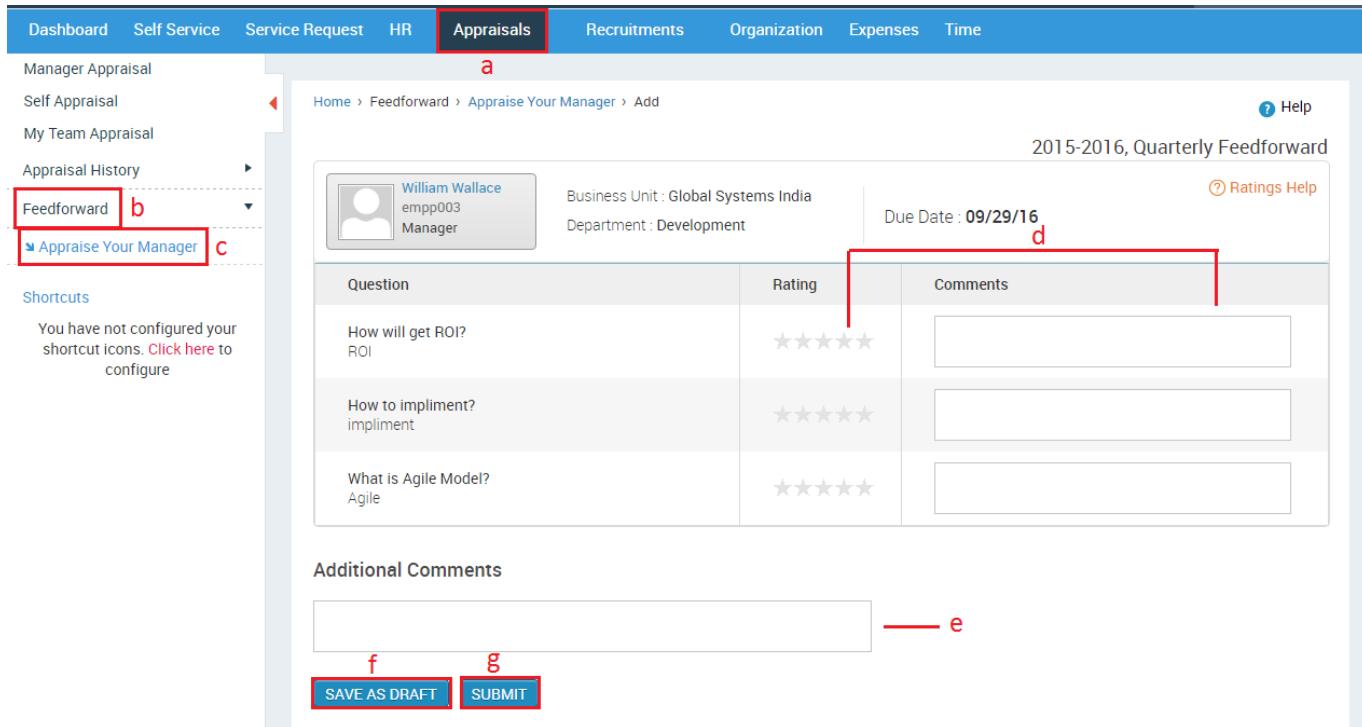


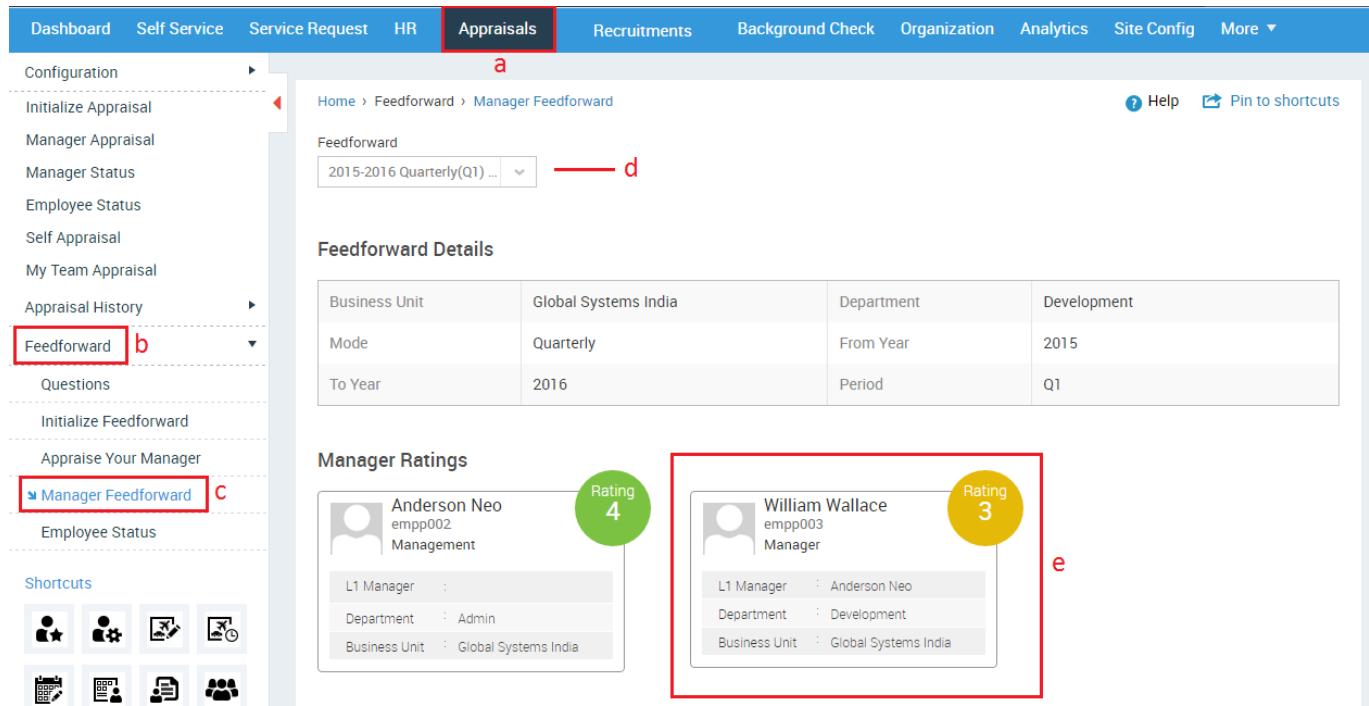
Figure 238

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

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

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

Please refer Figure 239



The screenshot shows the Sentrifugo HRMS application interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (which is highlighted with a red box), Recruitments, Background Check, Organization, Analytics, Site Config, and More. A left-hand sidebar contains sections for Configuration, Initialize Appraisal, Manager Appraisal, Manager Status, Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, Feedforward (highlighted with a red box), Questions, Initialize Feedforward, Appraise Your Manager, Manager Feedforward (highlighted with a red box), and Employee Status. Shortcuts are also listed. The main content area displays 'Feedforward Details' for the '2015-2016 Quarterly(Q1)' process. It shows a table with four rows: Business Unit (Global Systems India), Department (Development), Mode (Quarterly), From Year (2015), To Year (2016), Period (Q1). Below this, the 'Manager Ratings' section is shown, featuring two managers: Anderson Neo (Rating 4) and William Wallace (Rating 3). A red box labeled 'e' surrounds the manager ratings section.

Figure 239

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

Please refer Figure 240

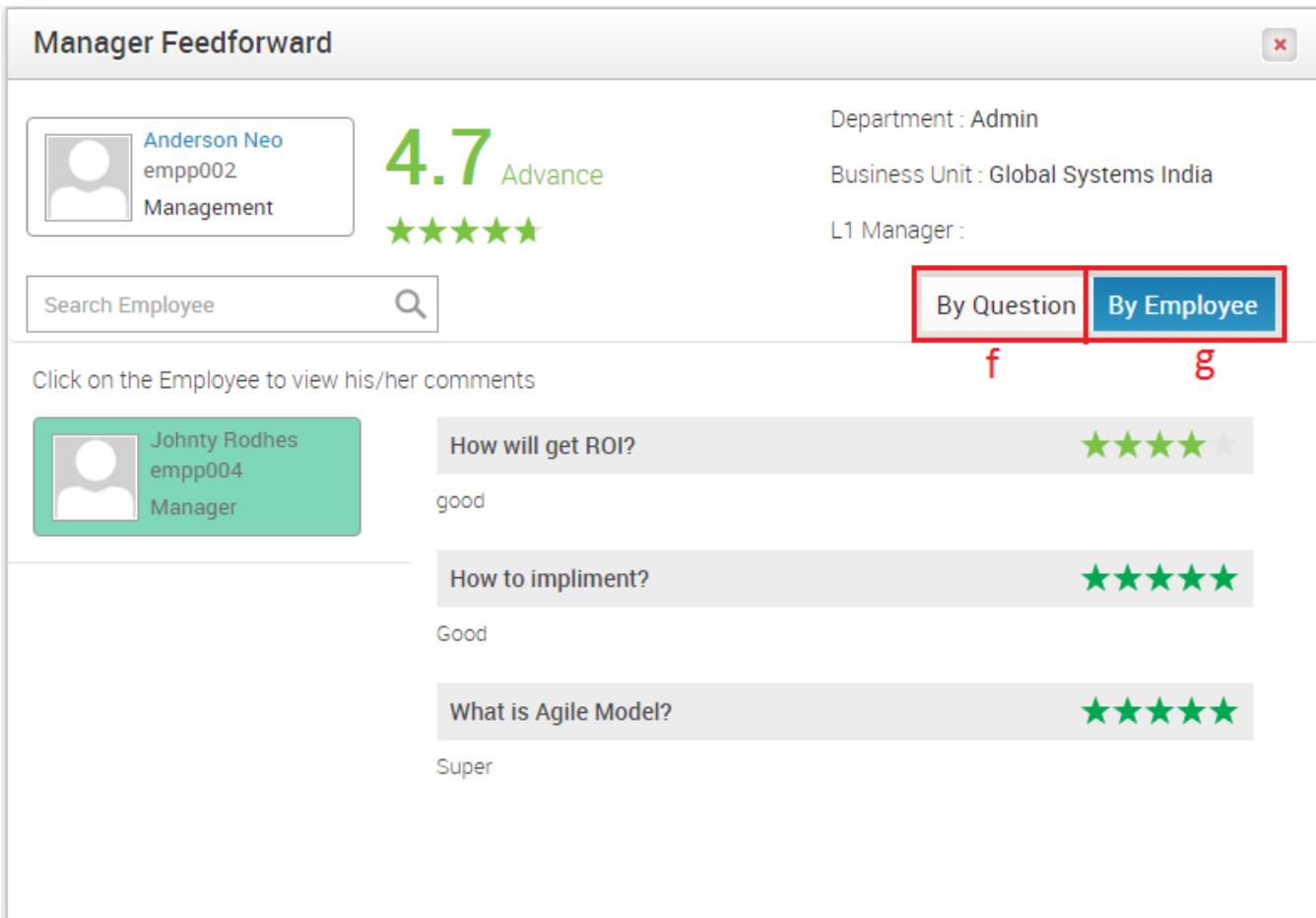


Figure 240

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

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

## 16.18 How do I view Employee Feedforward Status?

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

Please refer Figure 241

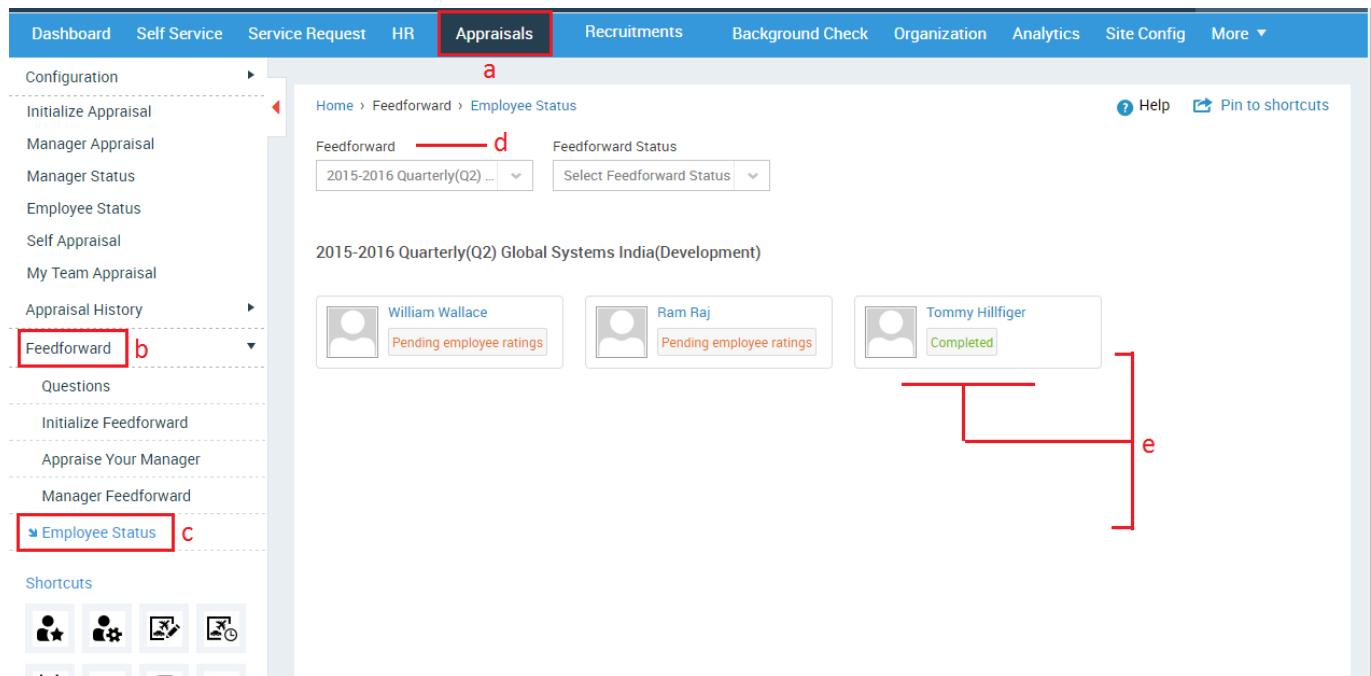


Figure 241

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

## 16.19 How do I view my Appraisal History?

Please refer Figure 242

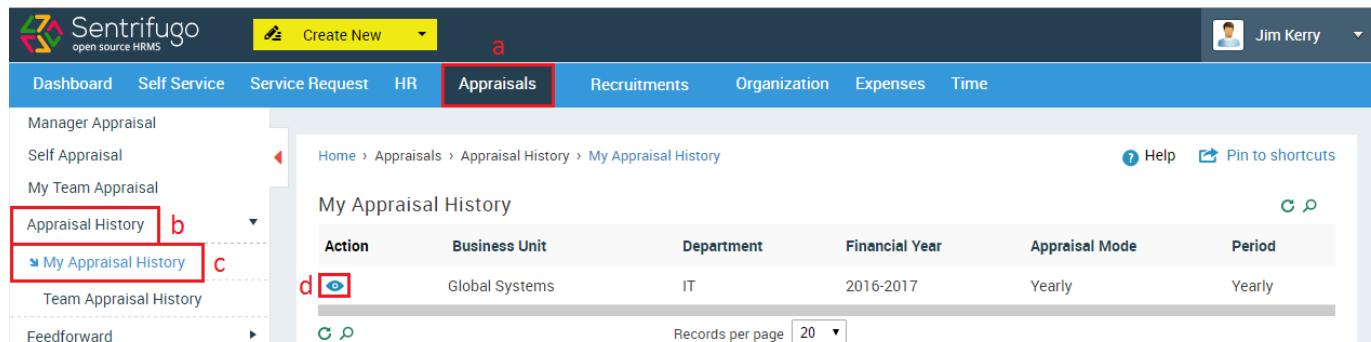
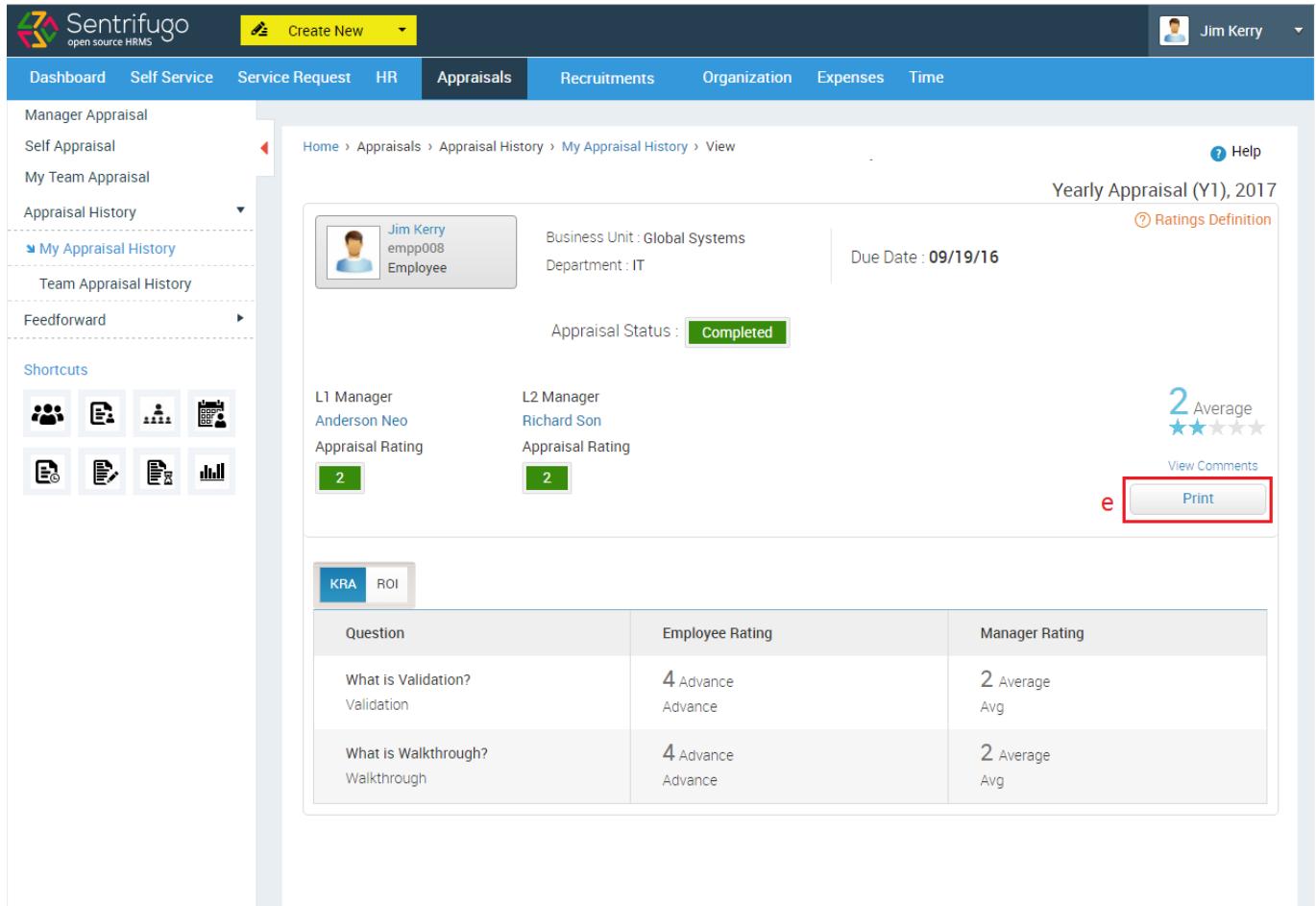


Figure 242

- Click **Appraisals** in the top menu
- Click **Appraisal History** on the left menu panel
- Click **My Appraisal History** in the submenu

- d. Click **View** icon

*Please refer Figure 243*



The screenshot shows the Sentrifugo HRMS application interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (which is the active tab), Recruitments, Organization, Expenses, and Time. A user profile for Jim Kerry is visible in the top right. The left sidebar has sections for Manager Appraisal, Self Appraisal, My Team Appraisal, Appraisal History (with a link to 'My Appraisal History' highlighted), Team Appraisal History, Feedforward, and Shortcuts (with icons for users, documents, reports, and charts). The main content area displays Jim Kerry's appraisal details: Business Unit: Global Systems, Department: IT, Due Date: 09/19/16, and Appraisal Status: Completed. It also shows L1 Manager (Anderson Neo) and L2 Manager (Richard Son) with their respective Appraisal Ratings (both 2). A rating summary shows an average of 2 stars. A table below lists KRA and ROI questions with employee and manager ratings. A red box highlights the 'Print' button at the bottom right of the main content area.

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

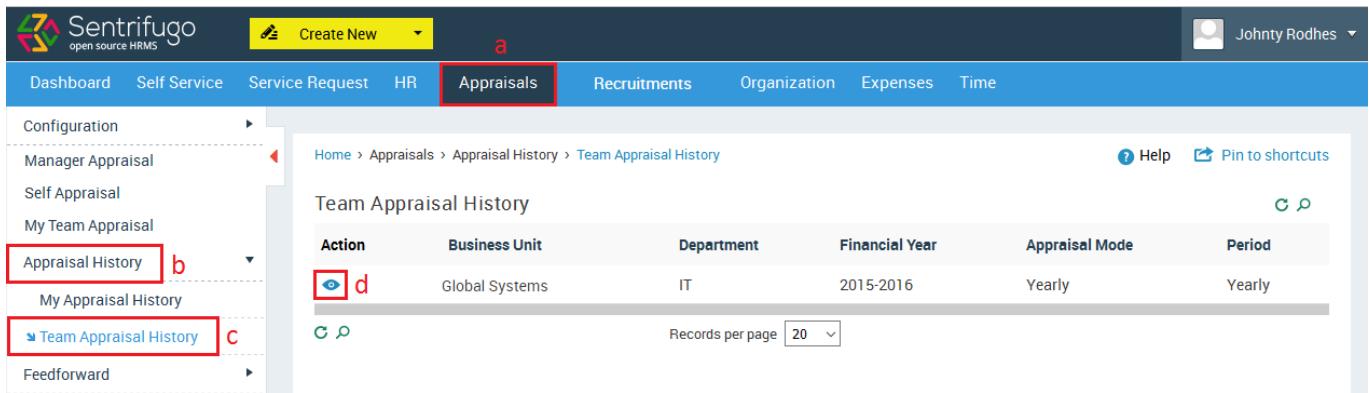
Figure 243

You can view your closed appraisal details here.

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

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

*Please refer Figure 244*

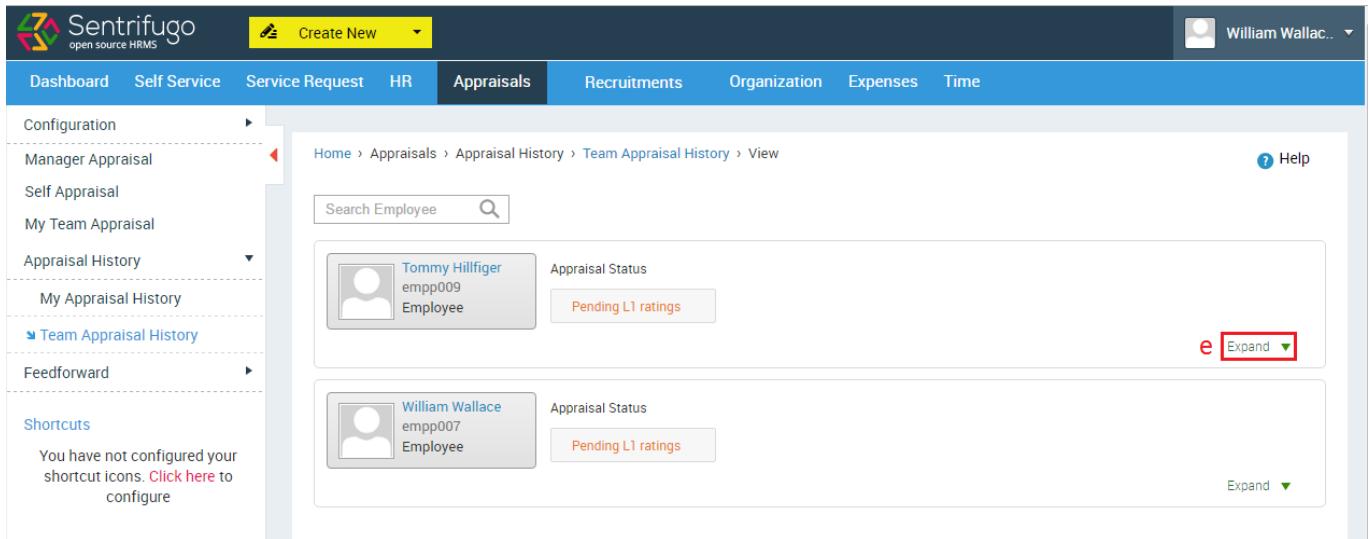


The screenshot shows the Sentrifugo application interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals (which is highlighted with a red box), Recruitments, Organization, Expenses, and Time. A user profile for 'Johnty Rodhes' is shown on the right. Below the navigation bar is a left sidebar with sections for Configuration, Manager Appraisal, Self Appraisal, My Team Appraisal, Appraisal History (with sub-options 'My Appraisal History' and 'Team Appraisal History' highlighted with red boxes 'b' and 'c'), and Feedforward. The main content area displays a 'Team Appraisal History' page with a table header: Action, Business Unit, Department, Financial Year, Appraisal Mode, and Period. A single row is shown with values: Global Systems, IT, 2015-2016, Yearly, and Yearly. There are also 'Help' and 'Pin to shortcuts' buttons at the top right of the content area.

Figure 244

- Click **Appraisals** in the top menu
- Click **Appraisal History** on the left menu panel
- Click **Team Appraisal History** in the submenu
- Click **View** icon

Please refer Figure 245

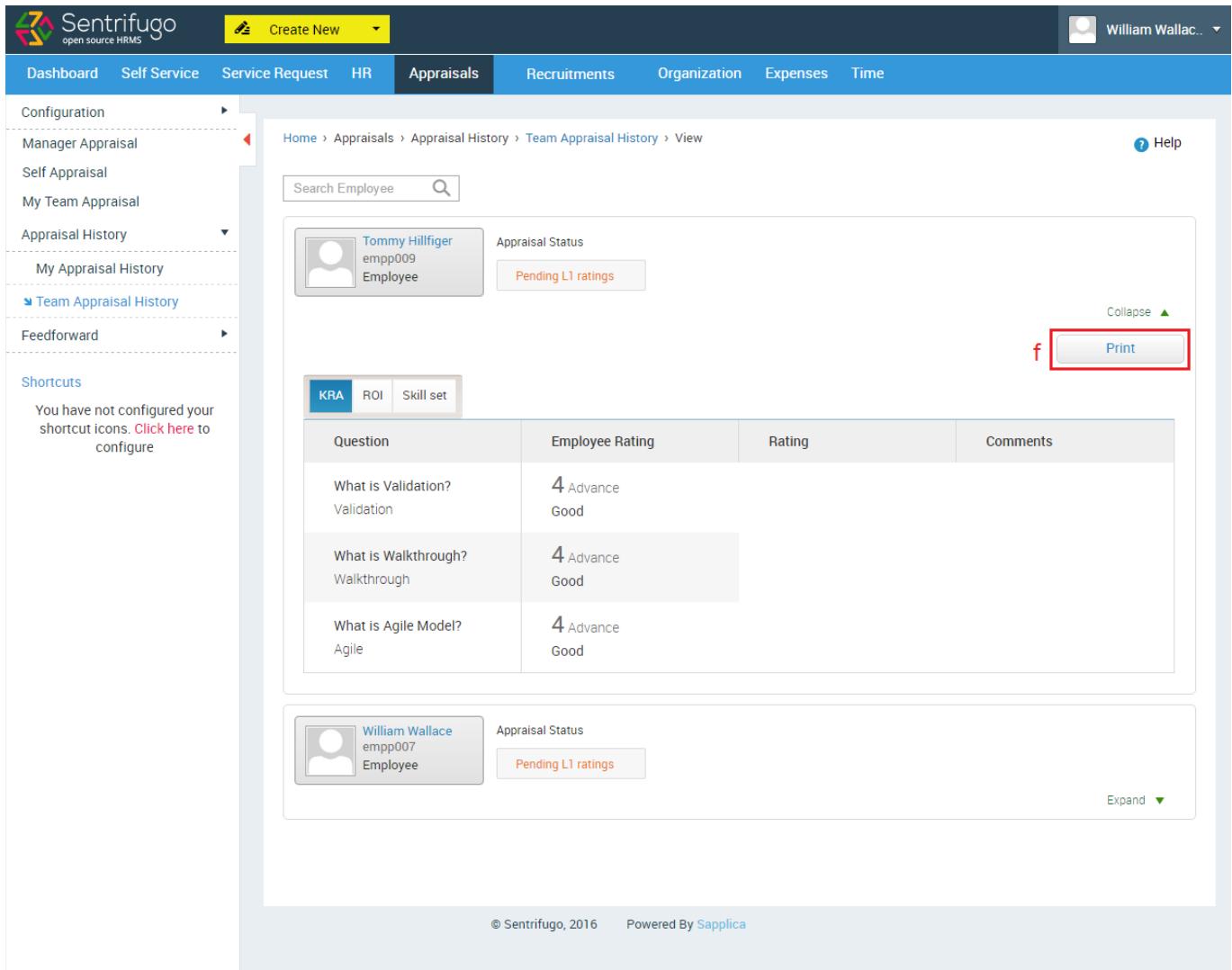


The screenshot shows the Sentrifugo application interface. The navigation bar and sidebar are identical to Figure 244. The main content area displays a 'Team Appraisal History' page with a search bar labeled 'Search Employee'. Two employee entries are listed: 'Tommy Hilfiger' (emp009) and 'William Wallace' (emp007). Each entry includes a thumbnail, name, employee ID, title ('Employee'), and an 'Appraisal Status' box ('Pending L1 ratings'). On the far right of each entry is an 'Expand' button with a dropdown arrow (highlighted with a red box 'e').

Figure 245

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

Please refer Figure 246



The screenshot shows the Sentrifugo HRMS application interface. The top navigation bar includes links for Create New, Dashboard, Self Service, Service Request, HR, Appraisals (which is selected), Recruitments, Organization, Expenses, and Time. A user profile for William Wallace is visible on the right.

The left sidebar contains sections for Configuration, Manager Appraisal, Self Appraisal, My Team Appraisal, Appraisal History (with sub-options: My Appraisal History and Team Appraisal History), Feedforward, and Shortcuts (which notes that shortcut icons have not been configured). The Team Appraisal History section is currently active.

The main content area displays a "Team Appraisal History" view for Tommy Hillfiger (emp009). It shows his profile picture, name, employee ID, and title (Employee). The appraisal status is listed as "Pending L1 ratings". A "Print" button is highlighted with a red box.

A table below shows the appraisal questions and their responses:

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

Below this, another section shows a profile for William Wallace (emp007) with the same pending rating status. A "Print" button is also present here.

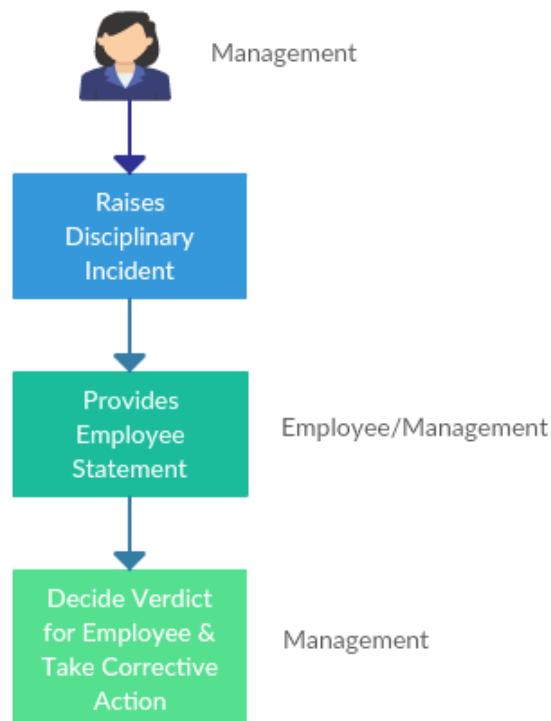
At the bottom, copyright information reads: © Sentrifugo, 2016 Powered By Sapplica

Figure 246

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

## 17. Disciplinary Incident Management

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



### Process Description:

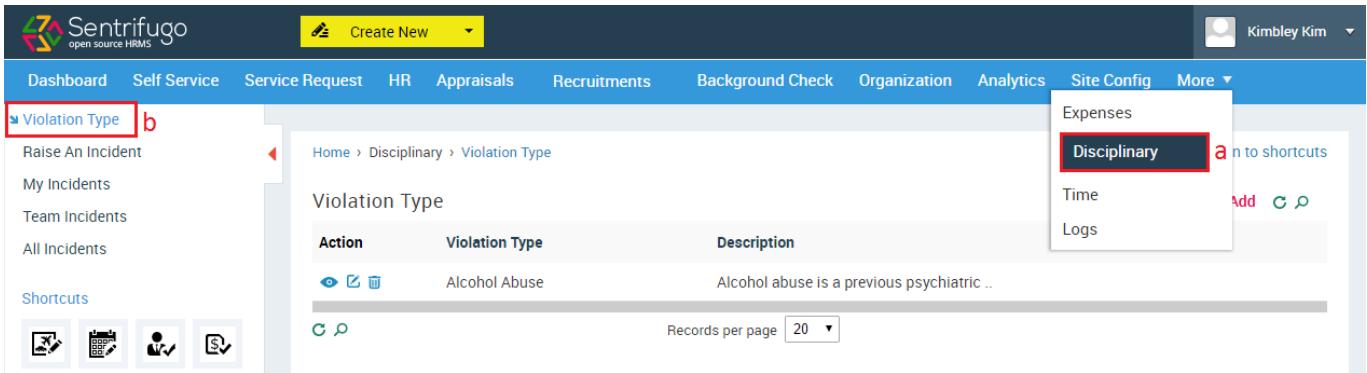
- User (Management) raises a disciplinary incident against an employee
- Employee can provide his/her appeal statement
- If the employee does not provide his/her appeal statement within the expiry date, then he/she will not be able to provide the appeal statement. In that case the User (Management) can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

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



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

Please refer Figure 247

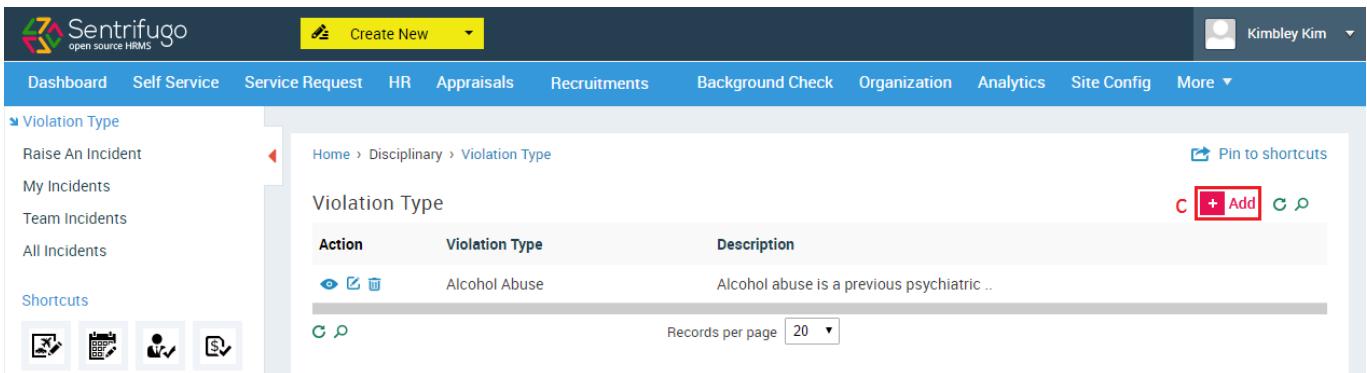


The screenshot shows the Sentrifugo open source HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The 'More' dropdown menu is open, showing options like Expenses, Disciplinary (which is highlighted with a red box), Time, and Logs. On the left, a sidebar has a 'Violation Type' link under 'Disciplinary' (also highlighted with a red box). The main content area displays a grid titled 'Violation Type' with columns for Action, Violation Type, and Description. One record is visible: 'Alcohol Abuse' with the description 'Alcohol abuse is a previous psychiatric ..'. The bottom of the grid shows buttons for C, P, and a records per page dropdown set to 20.

Figure 247

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

Please refer Figure 248

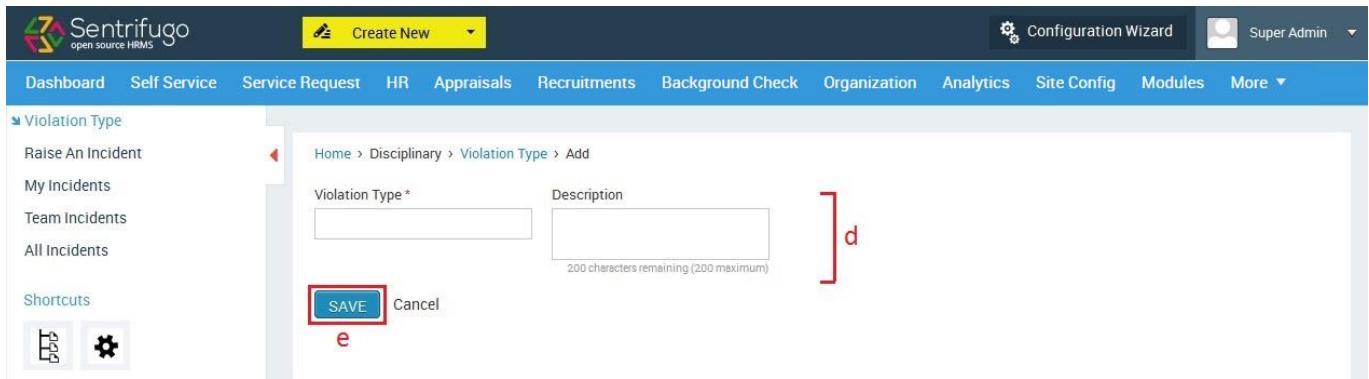


This screenshot is identical to Figure 247, showing the same application interface and data. The difference is in the top right corner of the grid header, where a red box highlights the '+Add' button, indicating the next step in the process.

Figure 248

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

Please refer Figure 249



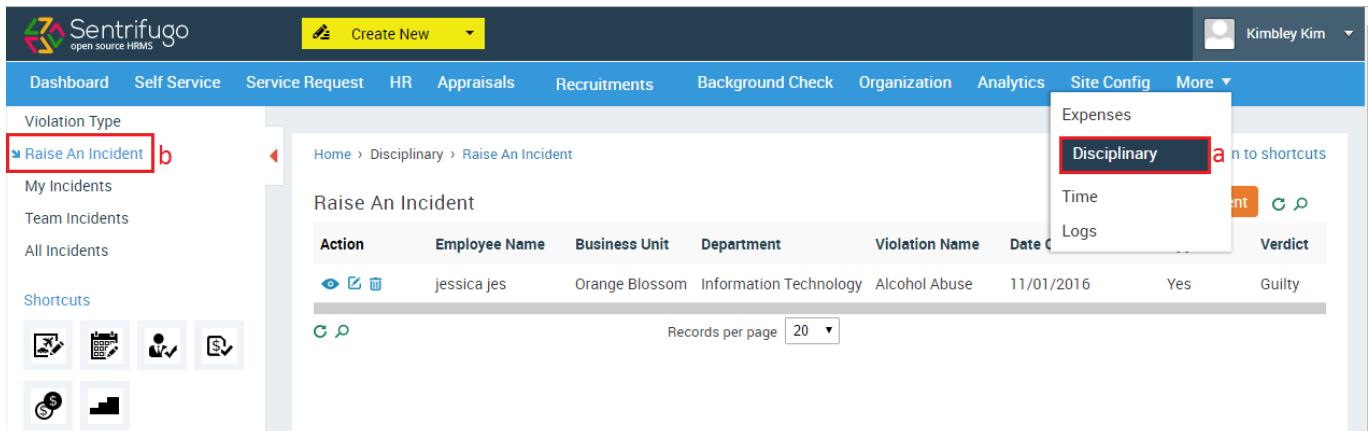
The screenshot shows the 'Violation Type' add form. It has two input fields: 'Violation Type \*' and 'Description'. A red bracket labeled 'd' points to the 'Violation Type \*' field. A red box labeled 'e' points to the 'SAVE' button.

Figure 249

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

## 17.2 How do I raise a disciplinary incident?

Please refer Figure 250



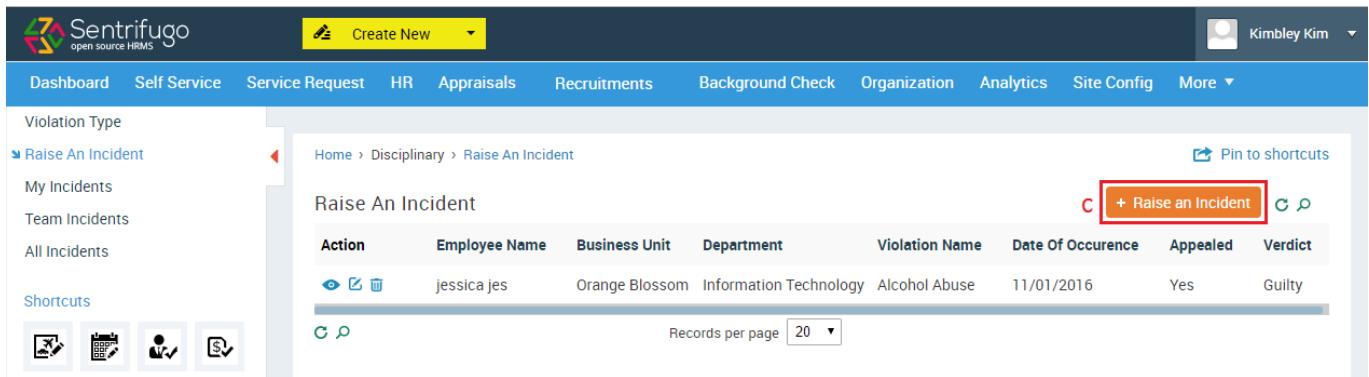
The screenshot shows the 'Raise An Incident' page. The top navigation bar has a dropdown menu open with 'Disciplinary' highlighted. The left sidebar has 'Raise An Incident' highlighted. The main table displays a single record:

Action	Employee Name	Business Unit	Department	Violation Name	Date	Verdict
	jessica jes	Orange Blossom	Information Technology	Alcohol Abuse	11/01/2016	Yes Guilty

Figure 250

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

Please refer Figure 251

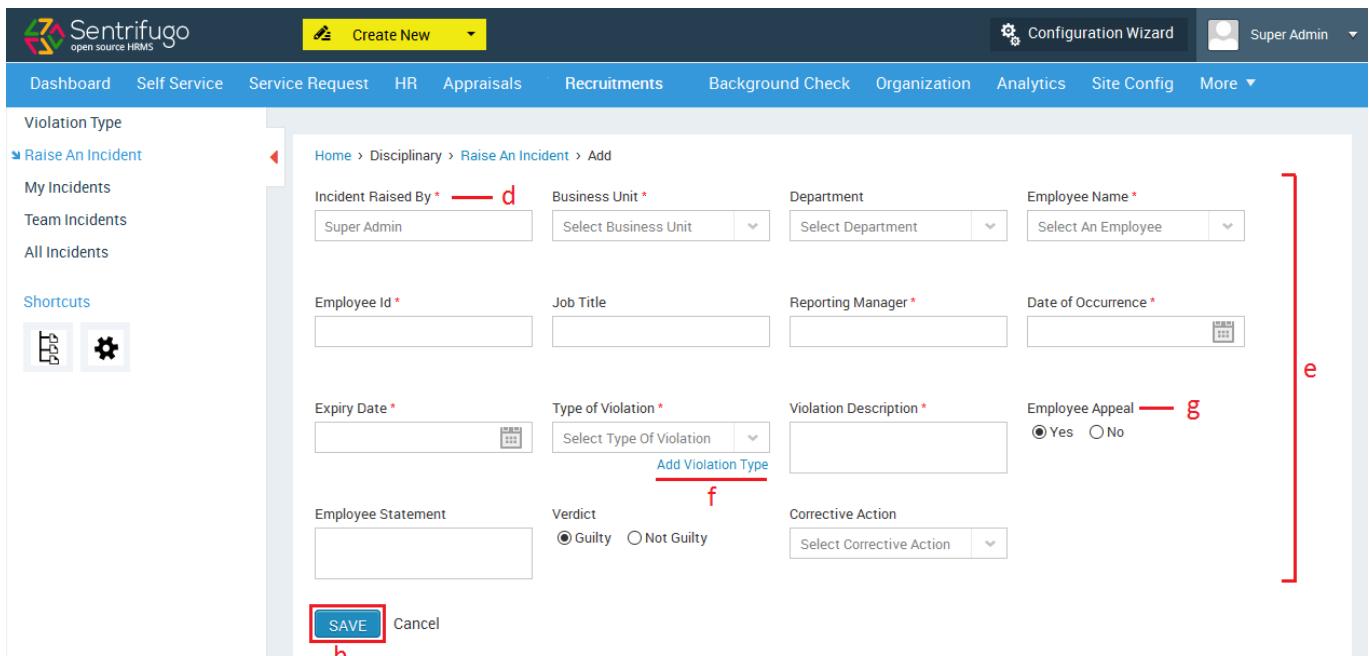


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists Violation Type, Raise An Incident, My Incidents, Team Incidents, All Incidents, and Shortcuts. The main content area displays a grid titled 'Raise An Incident' with columns for Action, Employee Name, Business Unit, Department, Violation Name, Date Of Occurrence,Appealed, and Verdict. A red box highlights the '+ Raise an Incident' button in the top right corner of the grid header.

Figure 251

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

Please refer Figure 252



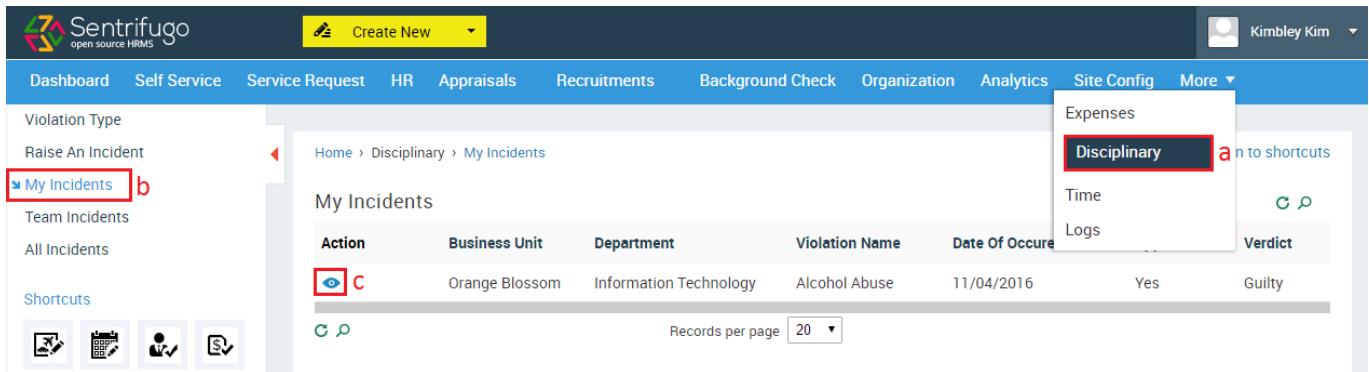
The screenshot shows the 'Raise An Incident' add form. The form includes fields for Incident Raised By (d), Business Unit, Department, Employee Name, Employee Id, Job Title, Reporting Manager, Date of Occurrence, Expiry Date, Type of Violation (with an 'Add Violation Type' link f), Violation Description, Employee Appeal (g), Employee Statement, Verdict (radio buttons for Guilty or Not Guilty), and Corrective Action. A red bracket on the right side groups fields d, e, f, g, and h. A red box highlights the 'SAVE' button at the bottom left.

Figure 252

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

## 17.3 How do I view my disciplinary incidents?

Please refer Figure 253

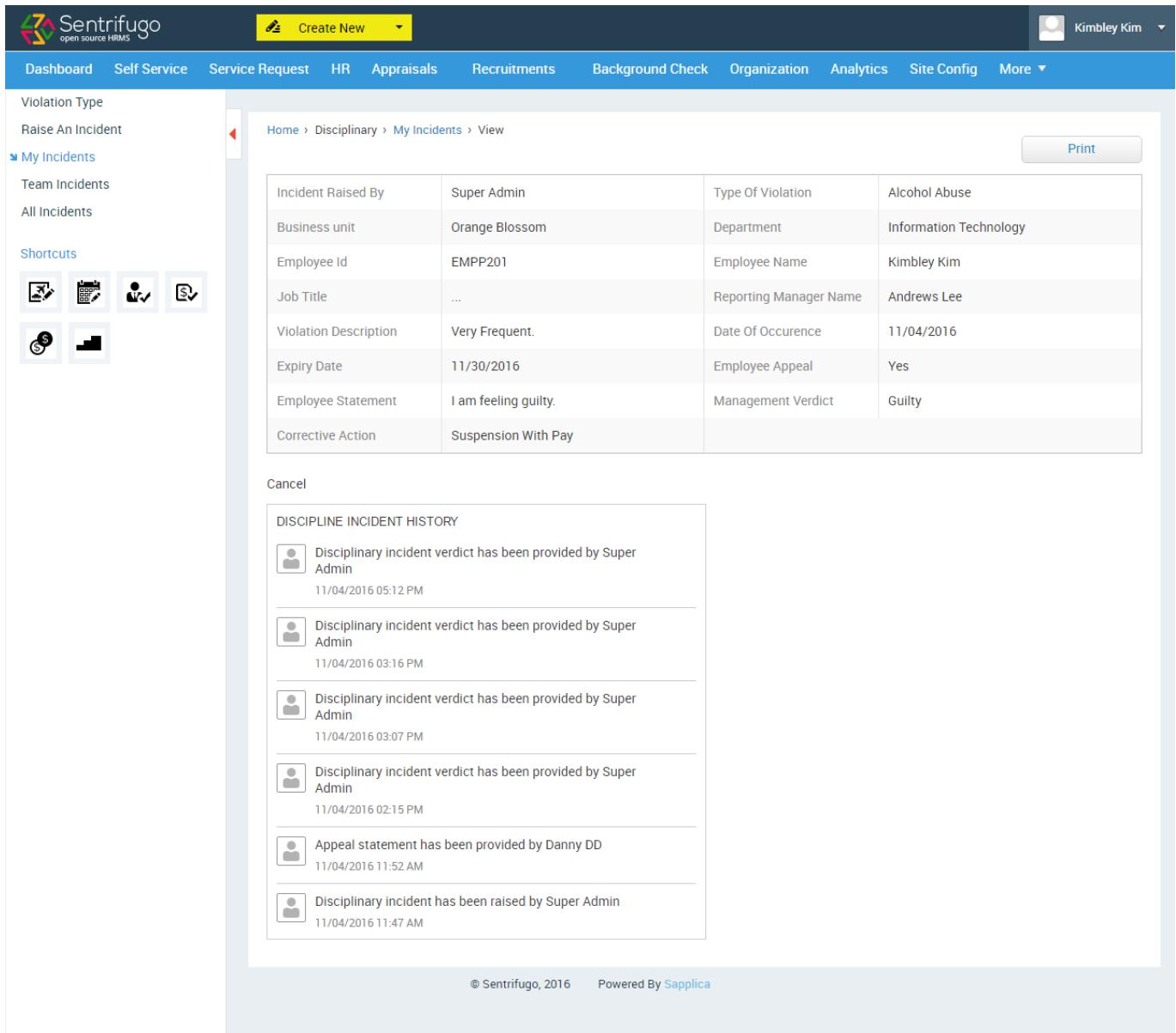


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A dropdown menu under 'More' is open, showing options like Expenses, Disciplinary (which is highlighted with a red box), Time, Logs, and Verdict. The main content area shows a list titled 'My Incidents' with columns for Action, Business Unit, Department, Violation Name, Date Of Occure, and Verdict. One row is visible: Action (with a view icon highlighted with a red box and labeled 'c'), Business Unit (Orange Blossom), Department (Information Technology), Violation Name (Alcohol Abuse), Date Of Occure (11/04/2016), Verdict (Yes). Below the table are icons for search, refresh, and user profile, and a dropdown for 'Records per page' set to 20.

Figure 253

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

Please refer Figure 254



The screenshot shows the Sentrifugo HRMS application interface. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A user profile for 'Kimbley Kim' is at the top right. Below the navigation is a sidebar with sections for Violation Type, Raise An Incident, My Incidents (selected), Team Incidents, All Incidents, and Shortcuts (with icons for Create New, Home, Disciplinary, My Incidents, and Print).

The main content area shows a table of 'My Incidents' details:

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

Below the table is a 'DISCIPLINE INCIDENT HISTORY' section with a list of events:

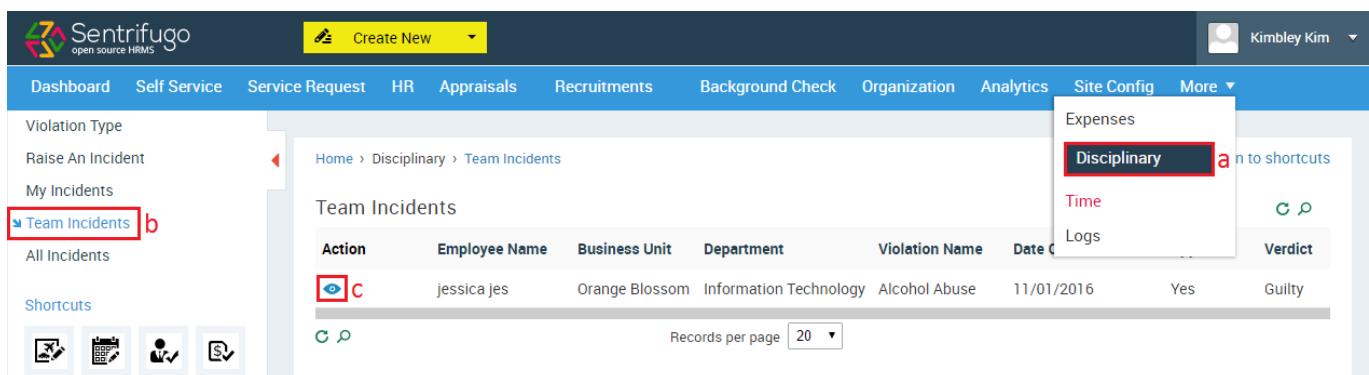
- Disciplinary incident verdict has been provided by Super Admin (11/04/2016 05:12 PM)
- Disciplinary incident verdict has been provided by Super Admin (11/04/2016 03:16 PM)
- Disciplinary incident verdict has been provided by Super Admin (11/04/2016 03:07 PM)
- Disciplinary incident verdict has been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

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Figure 254

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

*Please refer Figure 255*

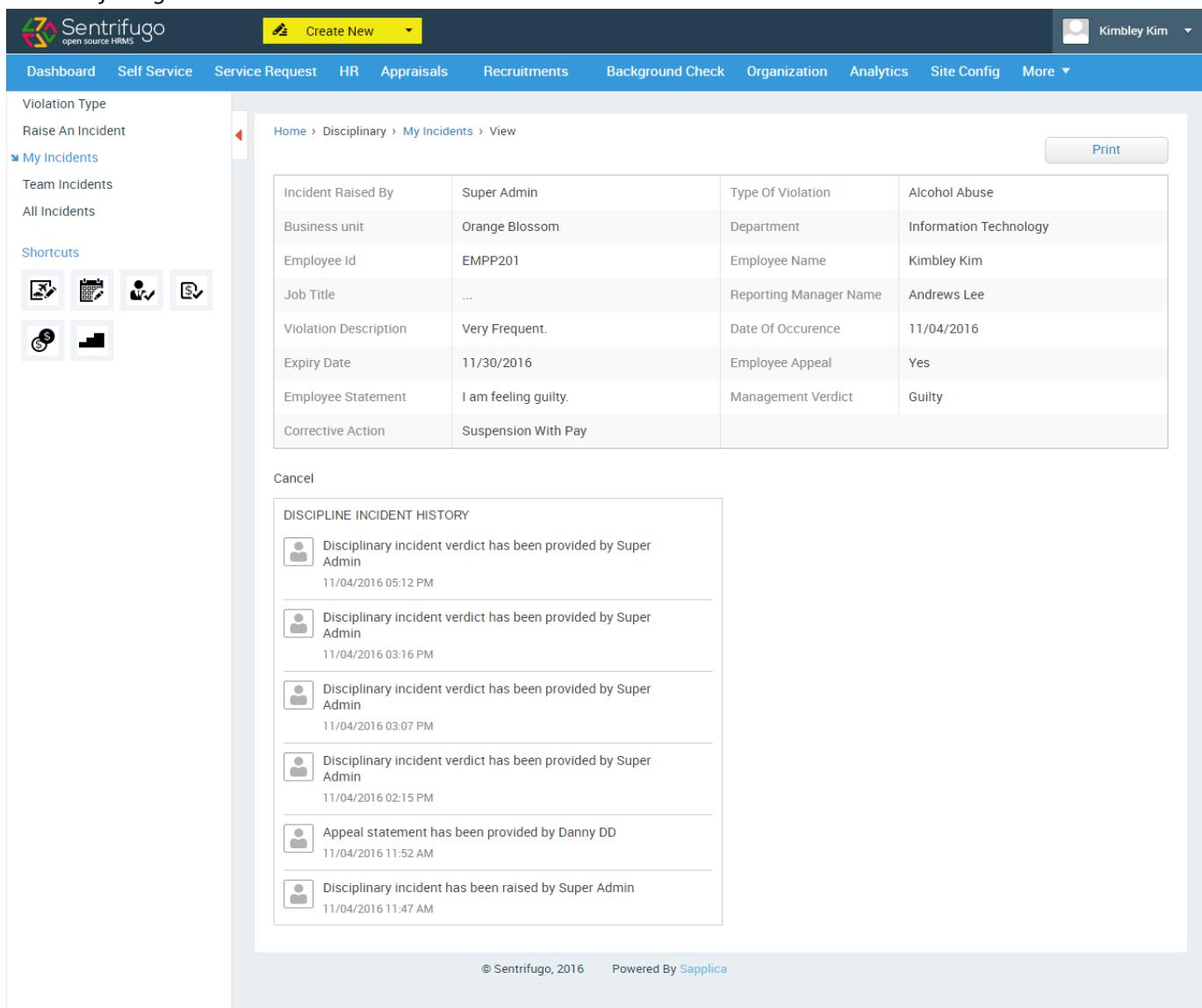


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The 'Disciplinary' link in the 'More' dropdown is highlighted with a red box. Below the navigation is a breadcrumb trail: Home > Disciplinary > Team Incidents. The main content area is titled 'Team Incidents' and displays a table with one row. The columns are Action, Employee Name, Business Unit, Department, Violation Name, Date C, and Verdict. The record shows: Action (eye icon), Employee Name (jessica jes), Business Unit (Orange Blossom), Department (Information Technology), Violation Name (Alcohol Abuse), Date C (11/01/2016), and Verdict (Yes). There are also 'Edit' and 'View' icons in the Action column.

Figure 255

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

Please refer Figure 256



The screenshot shows the Sentrifugo HRMS interface after clicking the 'View' icon from Figure 255. The top navigation bar and left sidebar are identical to Figure 255. The main content area is titled 'My Incidents' and shows a table with one row. The columns are Incident Raised By, Type Of Violation, Business unit, Department, Employee Id, Employee Name, Job Title, Reporting Manager Name, Violation Description, Date Of Occurrence, Expiry Date, Employee Appeal, Employee Statement, Management Verdict, and Corrective Action. The record shows: Incident Raised By (Super Admin), Type Of Violation (Alcohol Abuse), Business unit (Orange Blossom), Department (Information Technology), Employee Id (EMPP201), Employee Name (Kimbley Kim), Job Title (...), Reporting Manager Name (Andrews Lee), Violation Description (Very Frequent.), Date Of Occurrence (11/04/2016), Expiry Date (11/30/2016), Employee Appeal (Yes), Employee Statement (I am feeling guilty.), Management Verdict (Guilty), and Corrective Action (Suspension With Pay). Below the table is a 'Print' button and a 'Cancel' link. A large box labeled 'DISCIPLINE INCIDENT HISTORY' contains a list of discipline incidents with their details and timestamps:

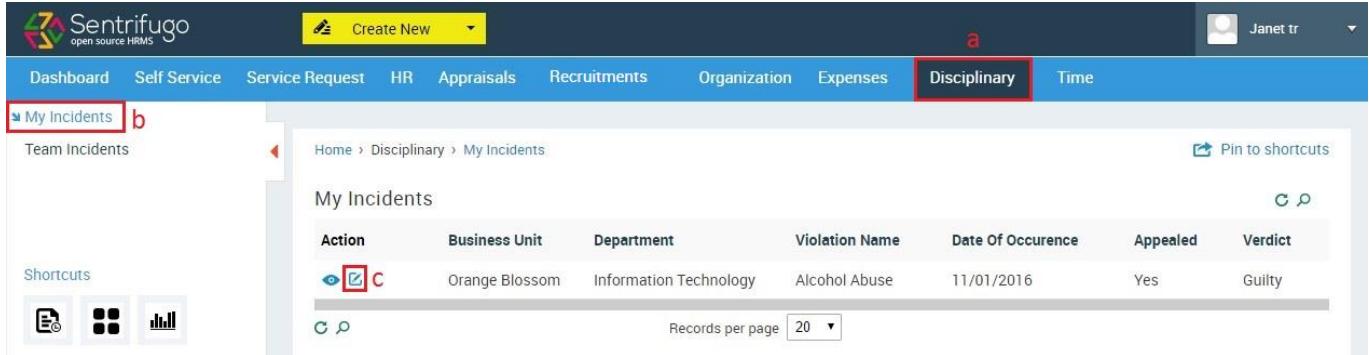
- Disciplinary incident verdict has been provided by Super Admin 11/04/2016 05:12 PM
- Disciplinary incident verdict has been provided by Super Admin 11/04/2016 03:16 PM
- Disciplinary incident verdict has been provided by Super Admin 11/04/2016 03:07 PM
- Disciplinary incident verdict has been provided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

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Figure 256

## 17.5 How do I provide my appeal statement?

Please refer Figure 257

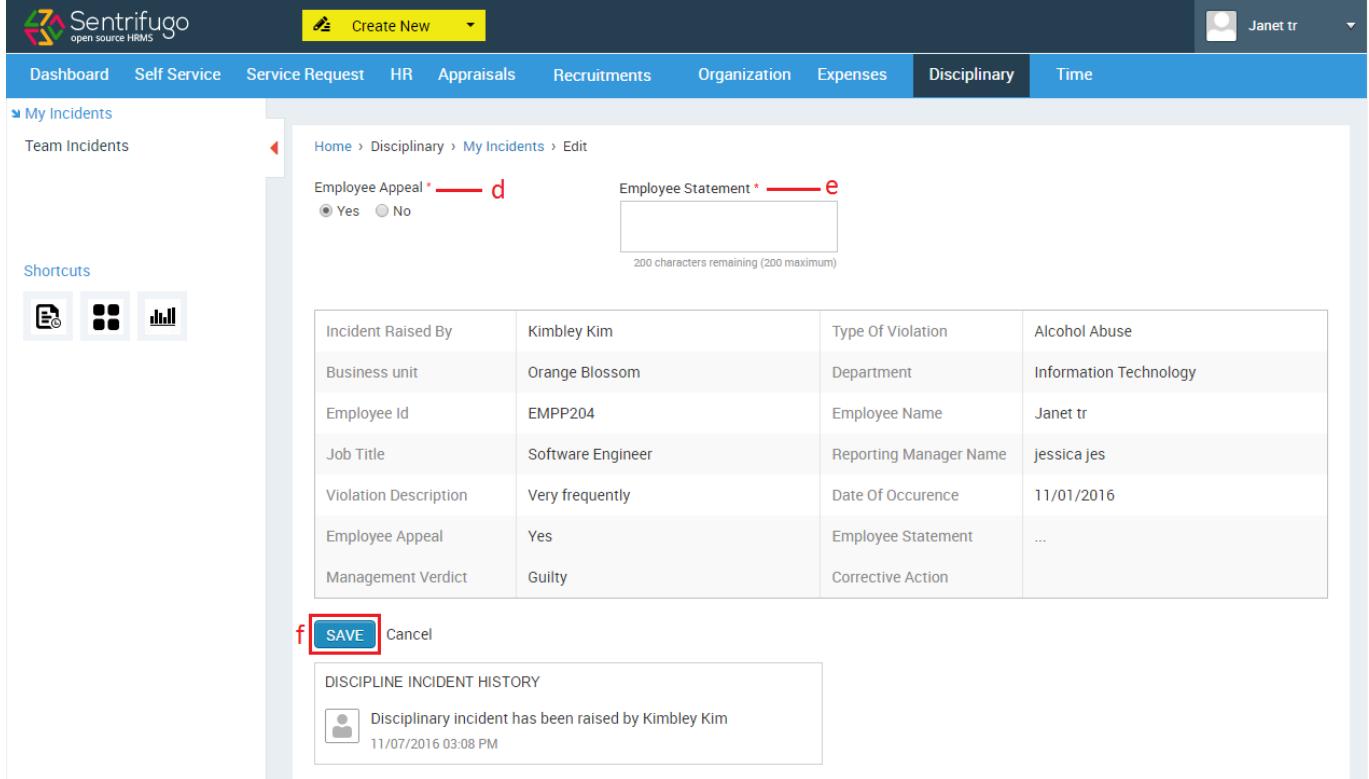


The screenshot shows the Sentrifugo web interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses, **Disciplinary** (which is highlighted with a red box), and Time. On the left, there's a sidebar with 'My Incidents' (highlighted with a red box) and 'Team Incidents'. The main content area displays a table titled 'My Incidents' with columns for Action, Business Unit, Department, Violation Name, Date Of Occurrence,Appealed, and Verdict. One row is visible, showing an edit icon in the Action column (highlighted with a red box), an Orange Blossom business unit, Information Technology department, Alcohol Abuse violation name, 11/01/2016 date, Yes appealed status, and Guilty verdict.

Figure 257

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

Please refer Figure 258



The screenshot shows the 'Edit' screen for a disciplinary incident. The top navigation bar and sidebar are identical to Figure 257. The main content area shows an 'Employee Appeal' field with a radio button for 'Yes' (highlighted with a red box) and an 'Employee Statement' text area (highlighted with a red box). Below this is a table with various incident details. At the bottom, there are 'SAVE' and 'Cancel' buttons (the 'SAVE' button is highlighted with a red box), and a 'DISCIPLINE INCIDENT HISTORY' section showing a log entry: 'Disciplinary incident has been raised by Kimbley Kim' on '11/07/2016 03:08 PM'.

Figure 258

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

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



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

*Please refer Figure 259*

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

Figure 259

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

Please refer Figure 260

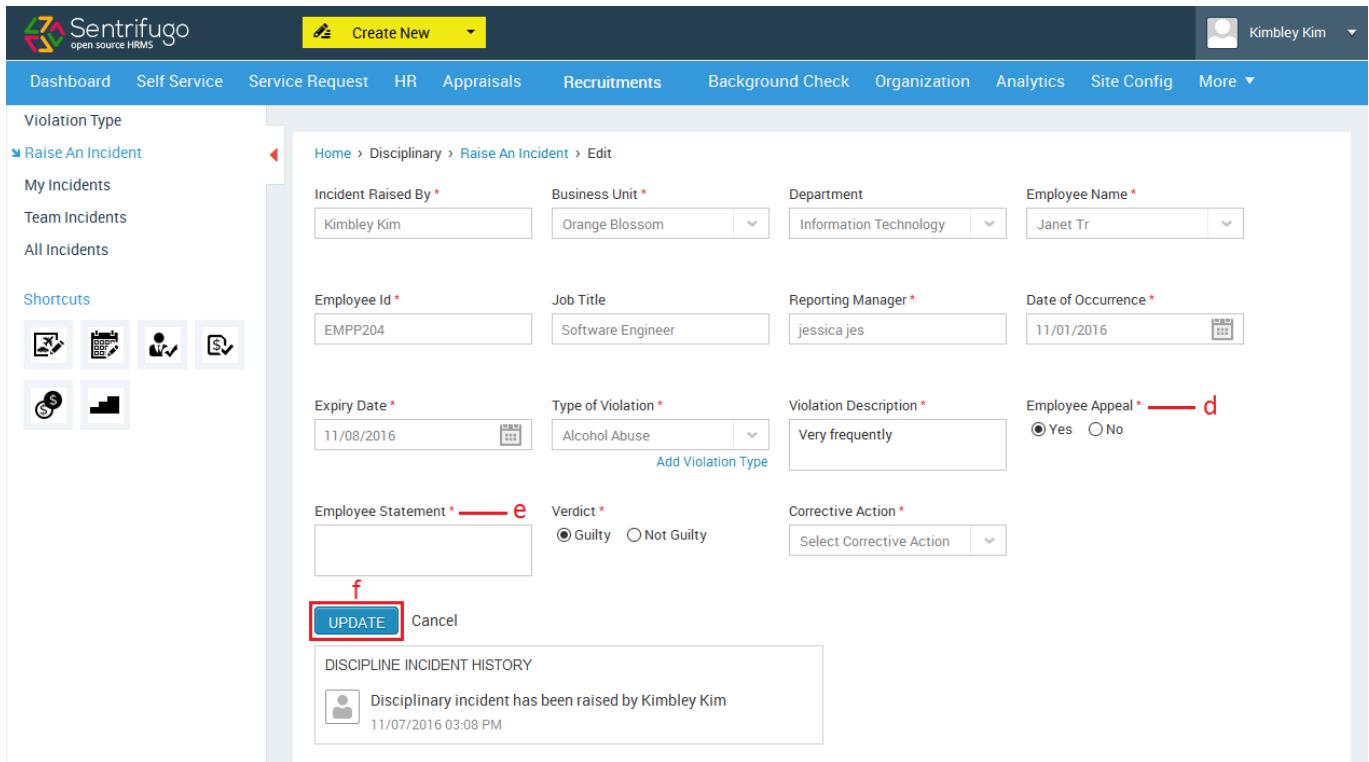


Figure 260

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

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

Please refer Figure 261

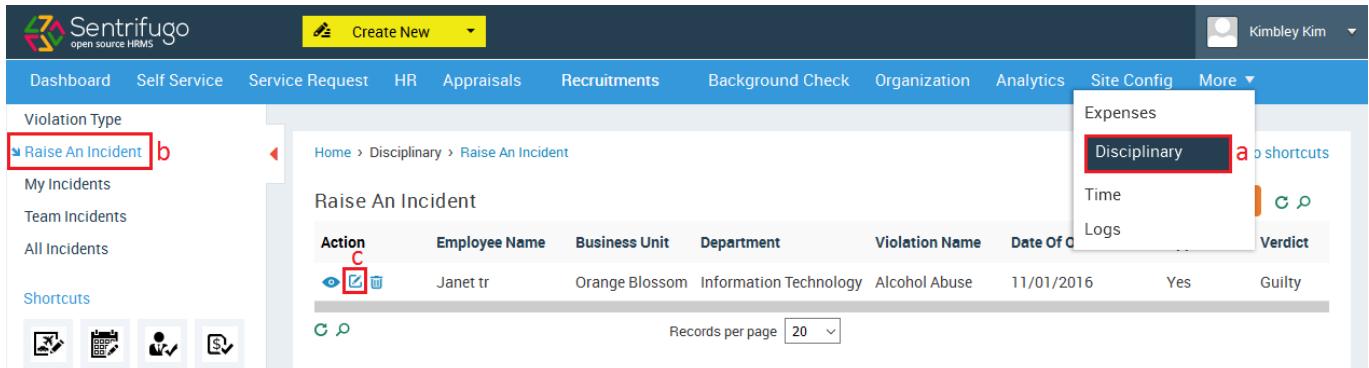
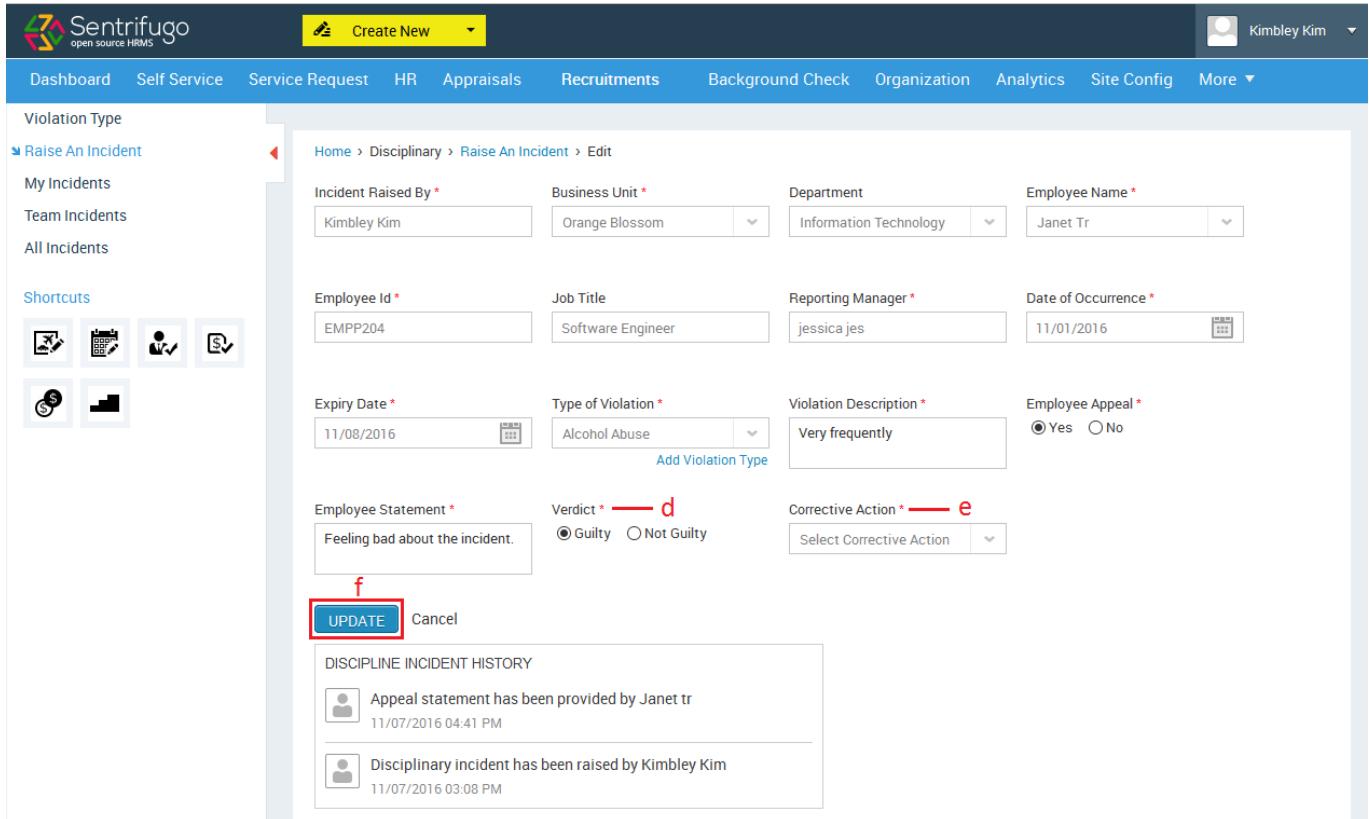


Figure 261

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

Please refer Figure 262



The screenshot shows the 'Raise An Incident' form in the Sentrifugo Disciplinary module. The form fields include:

- Incident Raised By:** Kimbley Kim
- Business Unit:** Orange Blossom
- Department:** Information Technology
- Employee Name:** Janet Tr
- Employee Id:** EMPP204
- Job Title:** Software Engineer
- Reporting Manager:** jessica jes
- Date of Occurrence:** 11/01/2016
- Expiry Date:** 11/08/2016
- Type of Violation:** Alcohol Abuse
- Violation Description:** Very frequently
- Employee Appeal:** Yes (radio button selected)
- Employee Statement:** Feeling bad about the incident.
- Verdict:** Guilty (radio button selected)
- Corrective Action:** Select Corrective Action

At the bottom left is a red box labeled 'f' over the **UPDATE** button. Below the form is a section titled 'DISCIPLINE INCIDENT HISTORY' showing two entries:

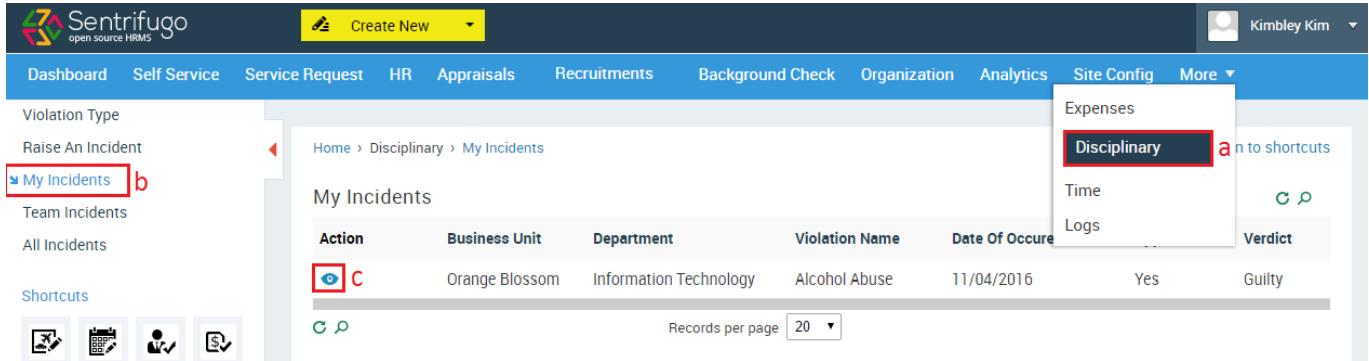
- Appeal statement has been provided by Janet tr 11/07/2016 04:41 PM
- Disciplinary incident has been raised by Kimbley Kim 11/07/2016 03:08 PM

Figure 262

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

## 17.8 How do I print my disciplinary incident?

Please refer Figure 263



The screenshot shows the 'My Incidents' list in the Sentrifugo Disciplinary module. The table displays the following data:

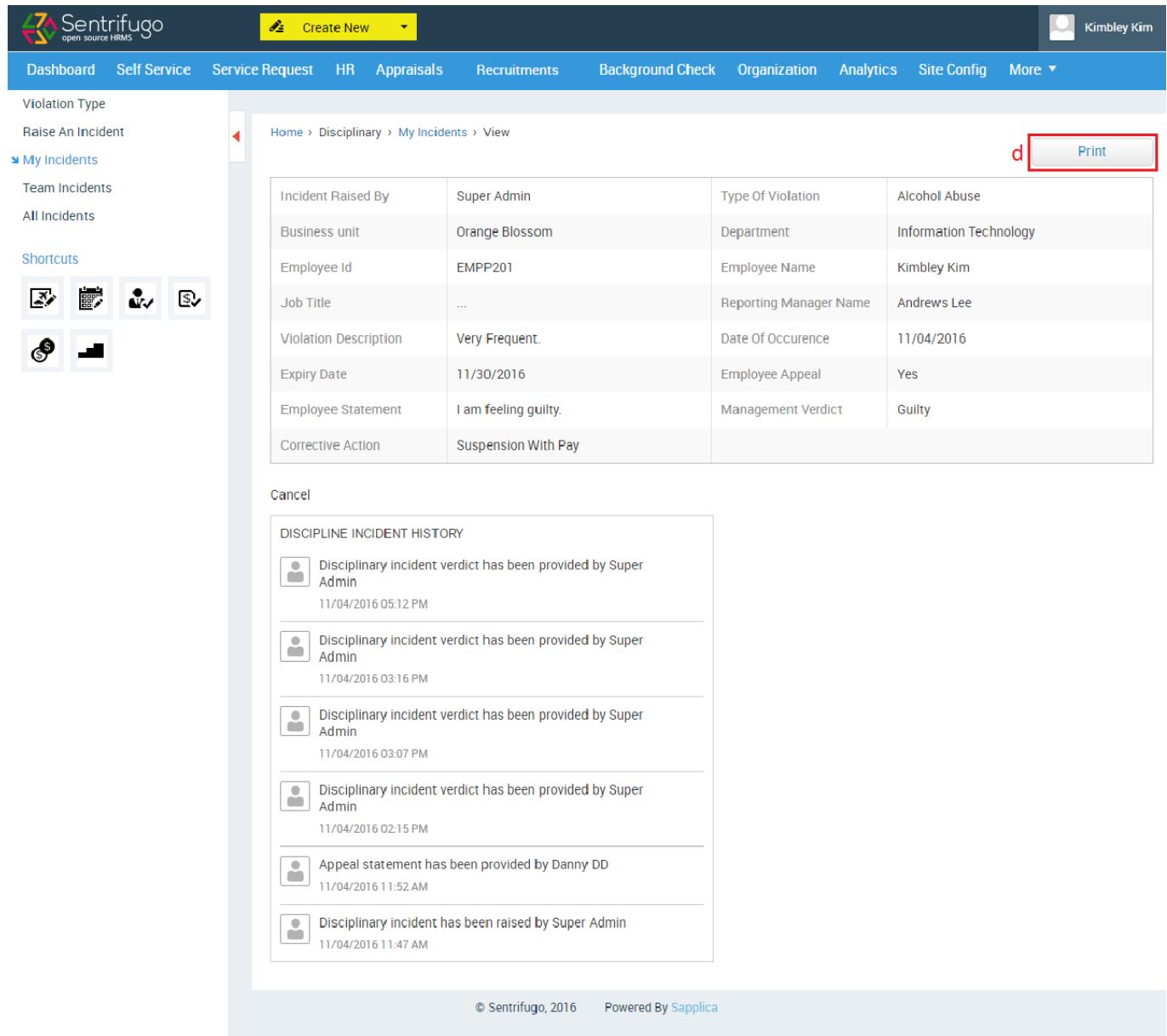
Action	Business Unit	Department	Violation Name	Date Of Occur	Yes	Guilty
	Orange Blossom	Information Technology	Alcohol Abuse	11/04/2016		

At the top right of the table, there is a red box labeled 'a' over the 'Disciplinary' menu item. To the right of the table, there are other menu items: Expenses, Time, Logs, and Verdict. At the bottom left of the table is a red box labeled 'c' over the 'View' icon in the Action column.

Figure 263

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

Please refer Figure 264



The screenshot shows the Sentrifugo open source HRMS interface. At the top, there's a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the far right, a user profile for 'Kimbley Kim' is shown. Below the navigation bar, a left sidebar contains links for Violation Type, Raise An Incident, My Incidents (which is selected and highlighted with a blue arrow), Team Incidents, All Incidents, and Shortcuts (with icons for employee, calendar, and document).

The main content area displays a 'My Incidents' view for 'My Incidents'. It includes a breadcrumb trail: Home > Disciplinary > My Incidents > View. In the top right of this area, there's a 'Print' button with a red box around it. The main content area shows a table with the following data:

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

Below the table, there's a 'Cancel' link and a 'DISCIPLINE INCIDENT HISTORY' section containing a list of events:

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

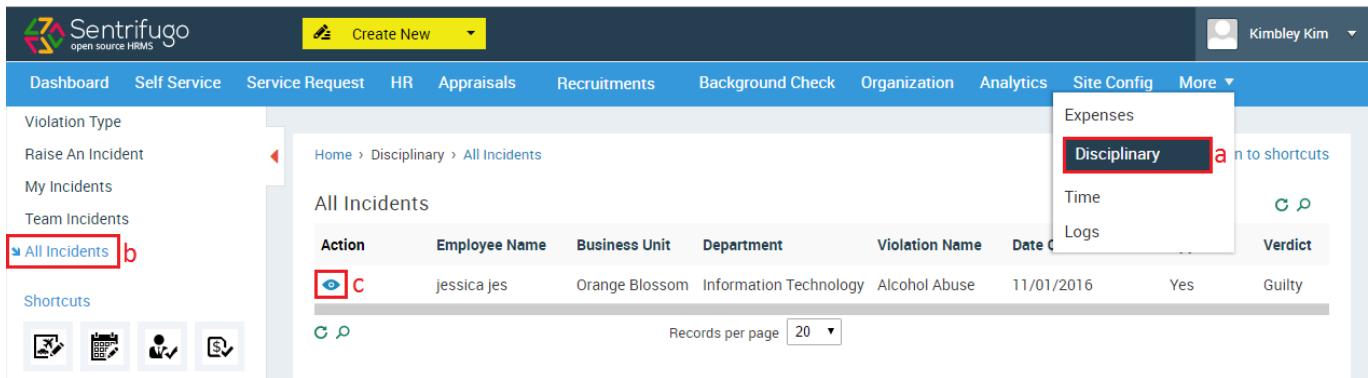
At the bottom of the page, there are copyright and powered-by details: © Sentrifugo, 2016 and Powered By Sapplica.

Figure 264

d. Click **Print** button

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

Please refer Figure 265

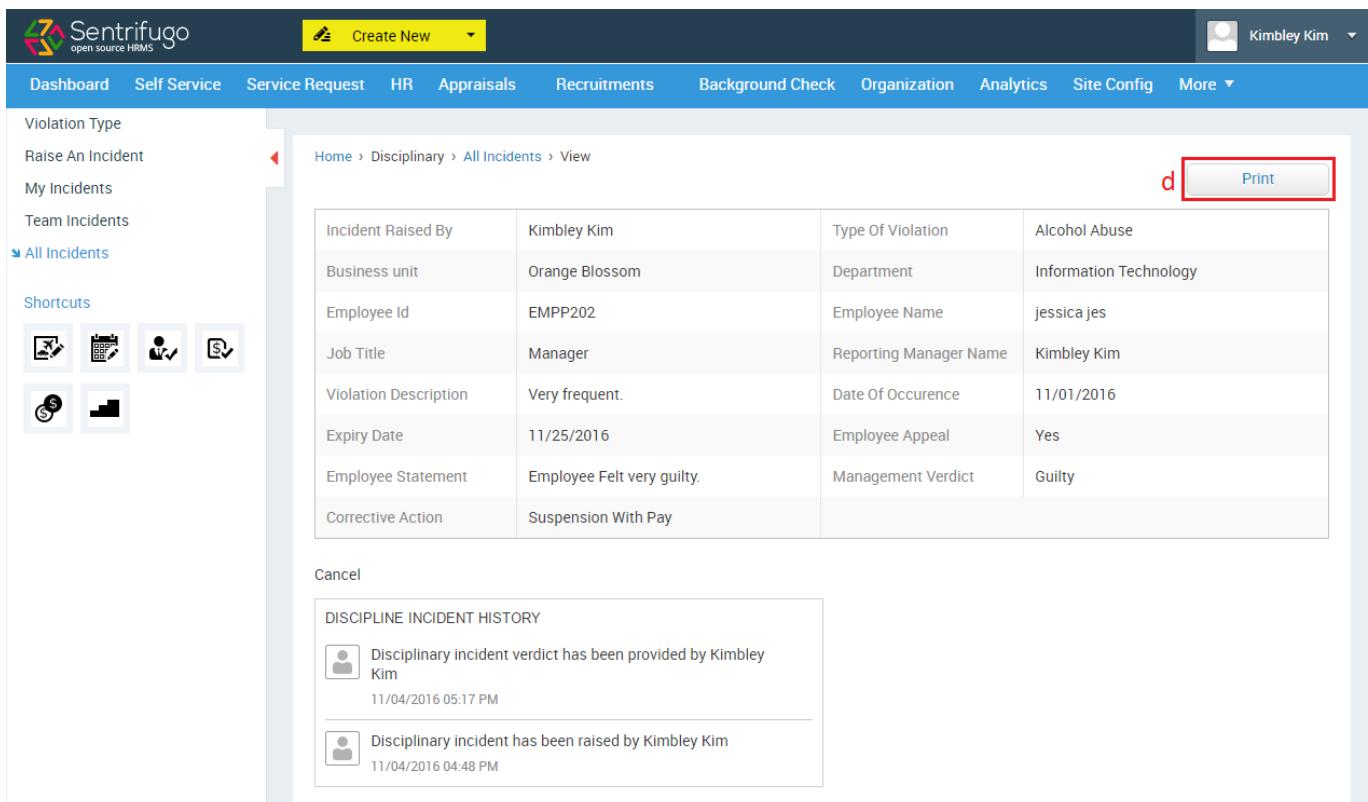


Action	Employee Name	Business Unit	Department	Violation Name	Date Of Occurrence	Employee Appeal	Management Verdict
	jessica jes	Orange Blossom	Information Technology	Alcohol Abuse	11/01/2016	Yes	Guilty

Figure 265

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

Please refer Figure 266



Incident Raised By	Kimbley Kim	Type Of Violation	Alcohol Abuse
Business unit	Orange Blossom	Department	Information Technology
Employee Id	EMPP202	Employee Name	jessica jes
Job Title	Manager	Reporting Manager Name	Kimbley Kim
Violation Description	Very frequent.	Date Of Occurrence	11/01/2016
Expiry Date	11/25/2016	Employee Appeal	Yes
Employee Statement	Employee Felt very guilty.	Management Verdict	Guilty
Corrective Action	Suspension With Pay		

DISCIPLINE INCIDENT HISTORY

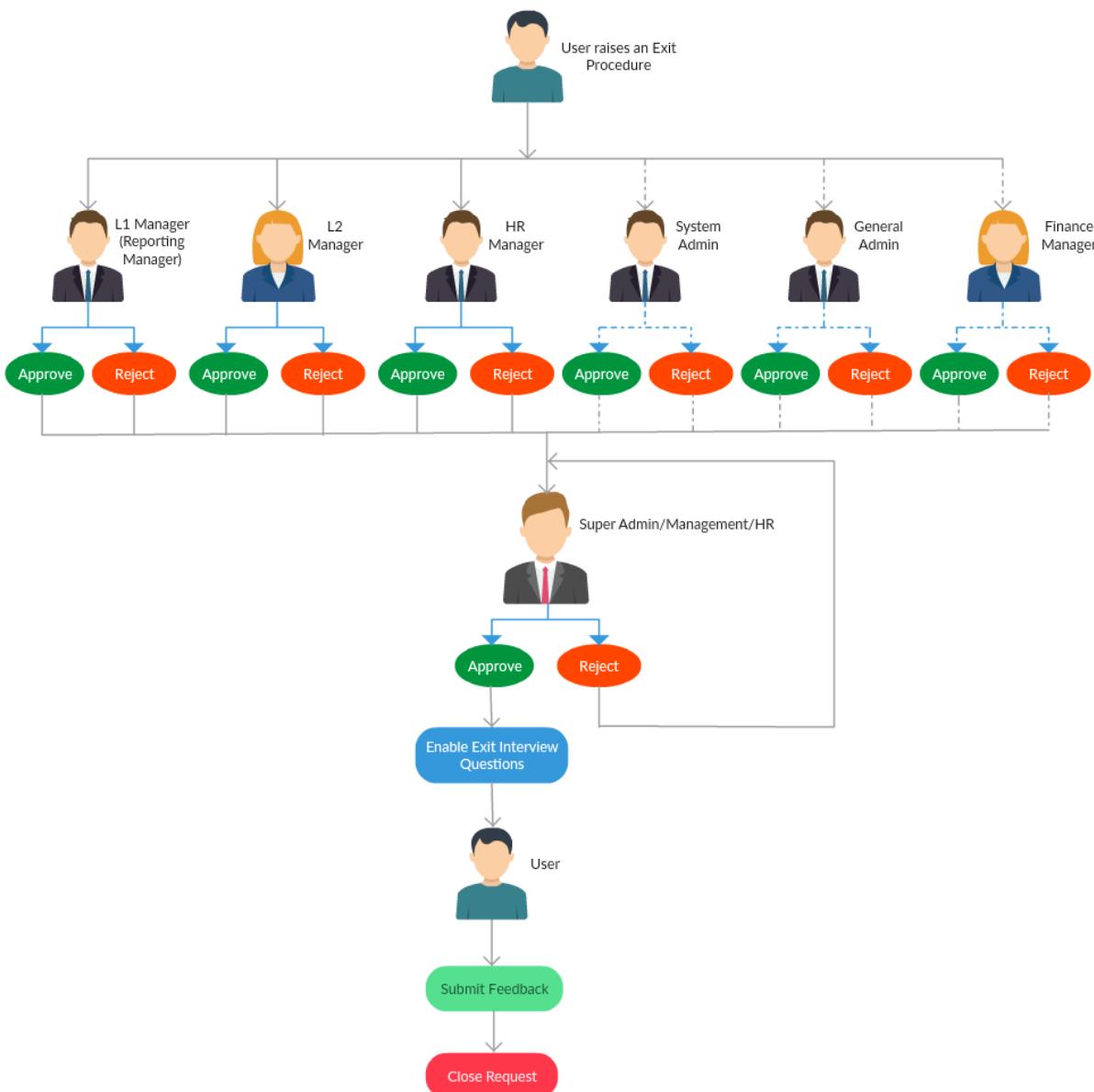
- Disciplinary incident verdict has been provided by Kimbley Kim  
11/04/2016 05:17 PM
- Disciplinary incident has been raised by Kimbley Kim  
11/04/2016 04:48 PM

Figure 266

- Click **Print** button

## 18. Exit Procedure

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



**Description:**

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

## 18.1 How do I configure Exit Types?

Please refer Figure 267

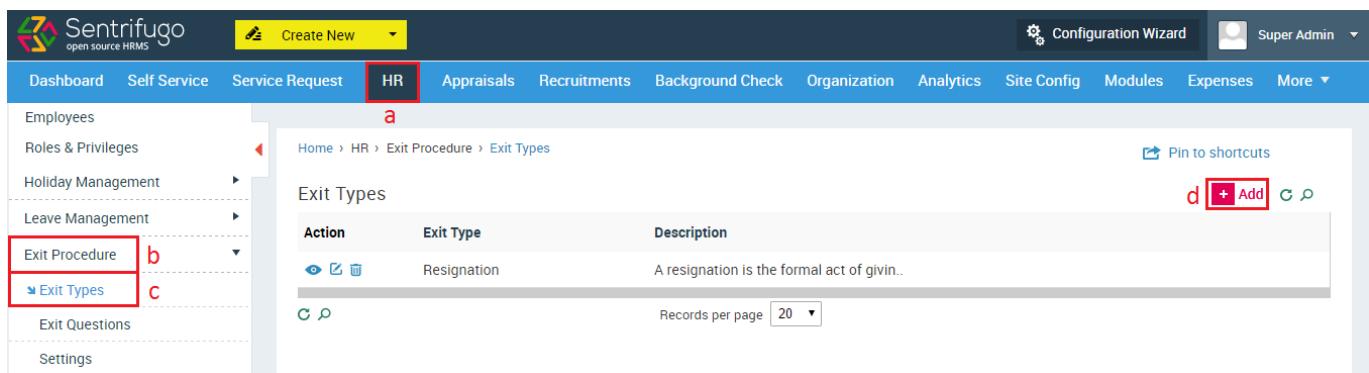


Figure 267

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

Please refer Figure 268

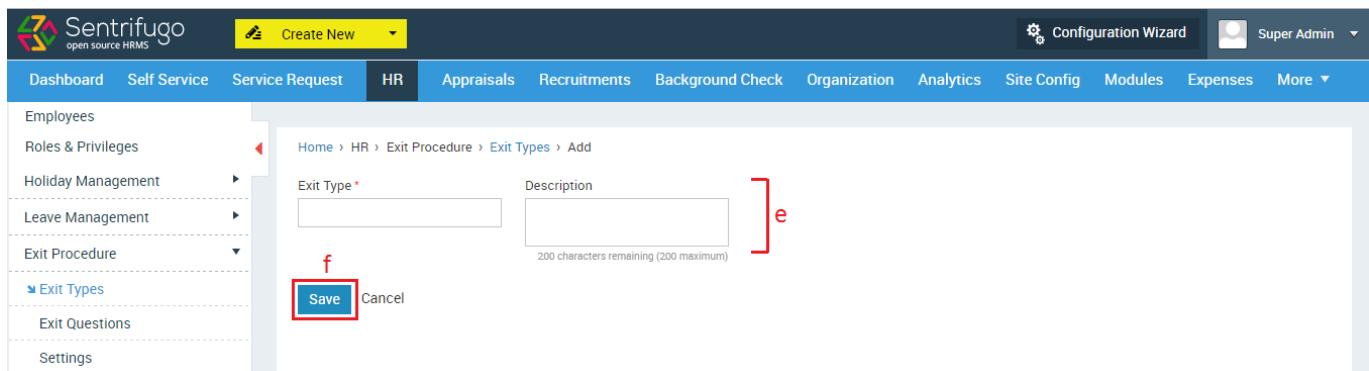
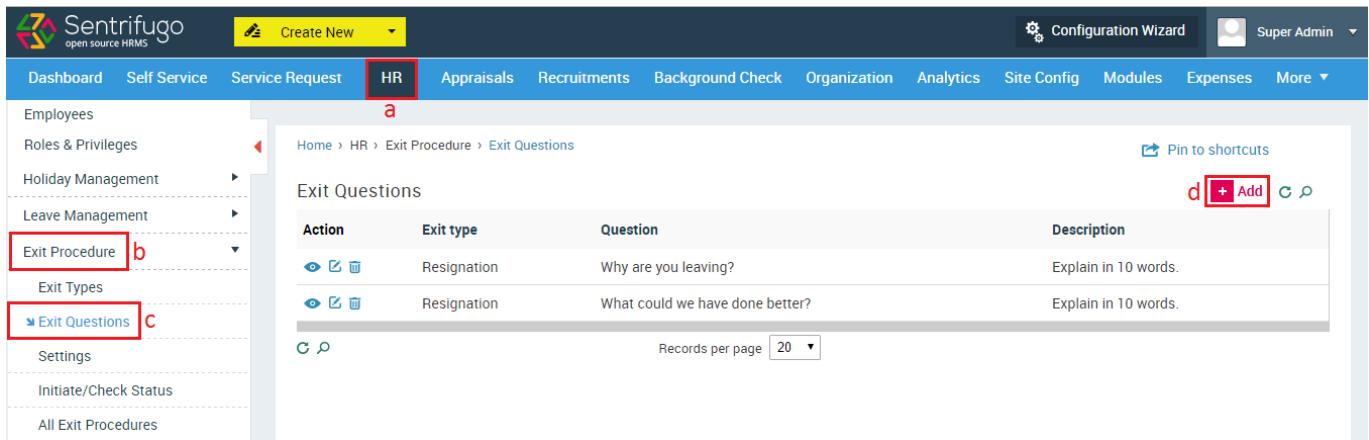


Figure 268

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

## 18.2 How do I configure Exit Questions?

Please refer Figure 269



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

Figure 269

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

Please refer Figure 270

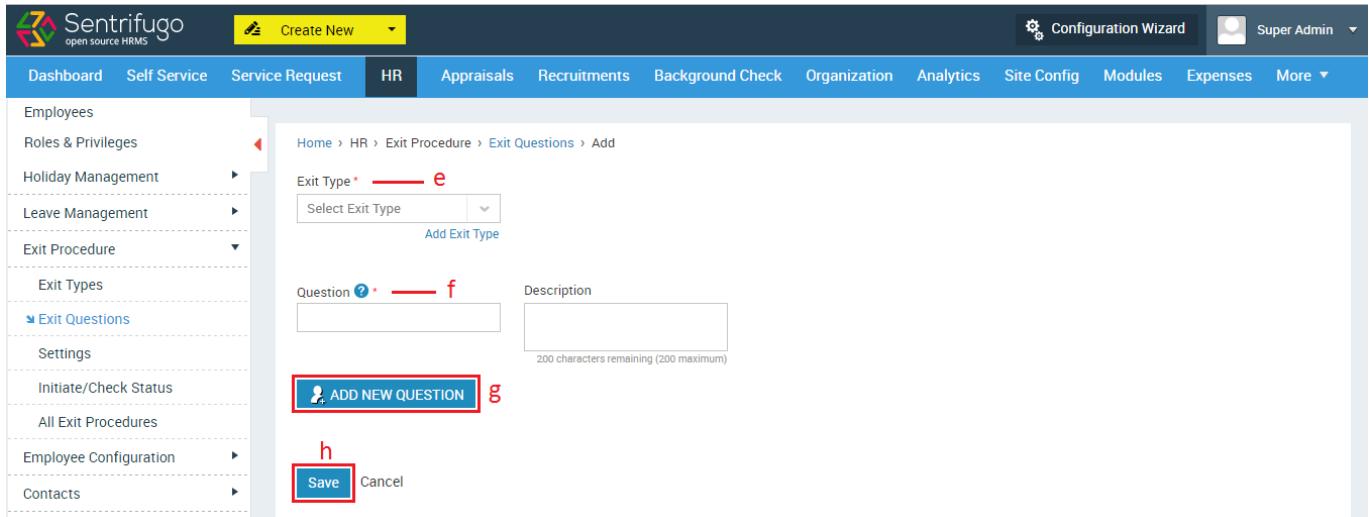
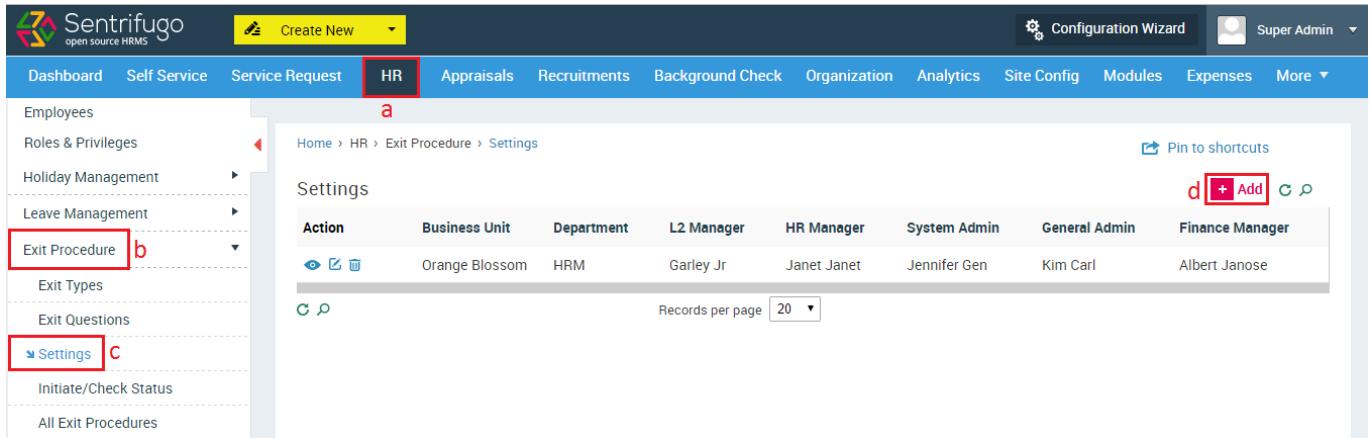


Figure 270

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

## 18.3 How do I configure Settings?

*Please refer Figure 271*

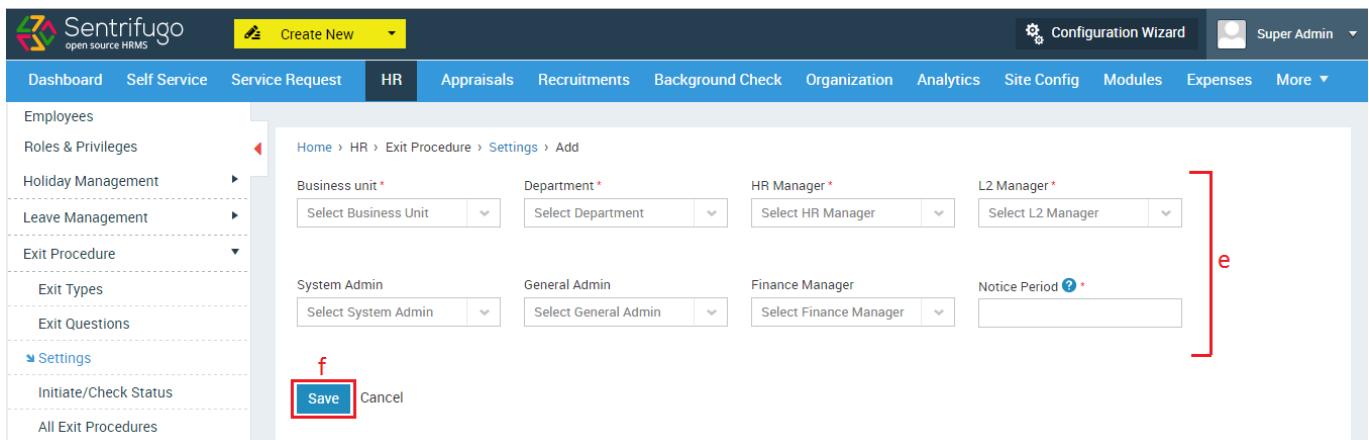


The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has tabs for Dashboard, Self Service, Service Request, HR (highlighted in blue), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. On the left, a sidebar lists Employees, Roles & Privileges, Holiday Management, Leave Management, Exit Procedure (highlighted in red), Exit Types, Exit Questions, and a 'Settings' link (highlighted in red). The main content area shows a table titled 'Settings' with columns for Action, Business Unit, Department, L2 Manager, HR Manager, System Admin, General Admin, and Finance Manager. A red box labeled 'a' points to the 'HR' tab in the top menu. A red box labeled 'b' points to the 'Exit Procedure' option in the sidebar. A red box labeled 'c' points to the 'Settings' link in the sidebar. A red box labeled 'd' points to the '+Add' button in the top right of the table area.

Figure 271

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

*Please refer Figure 272*



The screenshot shows the 'Add' form for 'Settings' under 'Exit Procedure'. The top navigation bar and main menu are identical to Figure 271. The sidebar shows the 'Settings' link (highlighted in red). The main content area is a form with fields for Business unit\*, Department\*, HR Manager\*, L2 Manager\*, System Admin, General Admin, Finance Manager, and Notice Period. A red box labeled 'e' points to the first four fields. A red box labeled 'f' points to the 'Save' button at the bottom left of the form.

Figure 272

- e. Enter the required details

- f. Click **Save** button



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

## 18.4 How do I initiate an Exit Procedure?

Please refer Figure 273

Figure 273

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

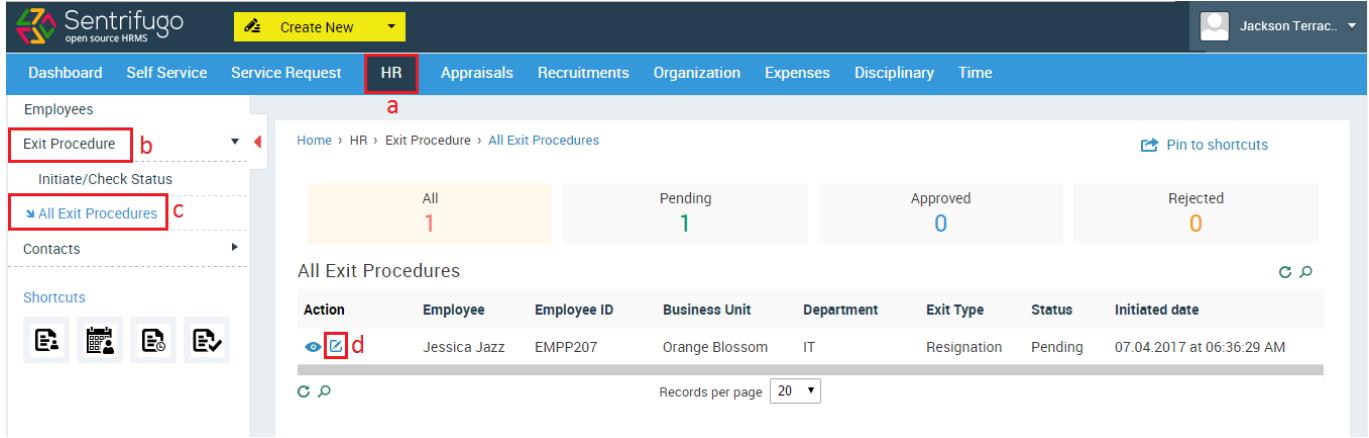
Please refer Figure 274

Figure 274

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

## 18.5 How do I approve an Exit Procedure?

Please refer Figure 275



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (which is highlighted with a red box labeled 'a'), Appraisals, Recruitments, Organization, Expenses, Disciplinary, and Time. On the far right, there's a user profile for 'Jackson Terrac...' and a 'Create New' button. The left sidebar has sections for Employees (with 'Exit Procedure' highlighted with a red box labeled 'b') and Contacts, along with various shortcuts represented by icons. The main content area displays a summary of exit procedures: All (1), Pending (1), Approved (0), and Rejected (0). Below this is a detailed table titled 'All Exit Procedures' with columns for Action, Employee, Employee ID, Business Unit, Department, Exit Type, Status, and Initiated date. One record is listed: Jessica Jazz (Employee ID EMPP207) from the Orange Blossom business unit in the IT department, with a resignation exit type, pending status, and initiated on 07.04.2017 at 06:36:29 AM. The 'Action' column for this record contains an edit icon, which is highlighted with a red box labeled 'd'.

Figure 275

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

Please refer Figure 276

Sentrifugo open source HRMS

Create New ▾

Garley Jr ▾

Dashboard Self Service Service Request HR Appraisals Recruitments Organization Expenses Disciplinary Time

Employees

Exit Procedure

- Initiate/Check Status
- All Exit Procedures

Contacts

Shortcuts

**e**

Status: \* — e Comments: \* — f

Select Status

**Update** Cancel

**g**

Employee Details — h

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

**i**

Exit Procedure Details — i

Exit Type	Resignation	Raised on	06.04.2017
Comments	--	Process Status	Pending
Relieving Date	21.05.2017		
L1 Manager	Jackson Terrace	Status	Pending
Comments	--		
L2 Manager	Garley Jr	Status	Pending
Comments	--		
HR Manager	Janet Janet	Status	Pending
Comments	--		
System Admin	Jennifer Gen	Status	Pending
Comments	--		
General Admin	Kim Carl	Status	Pending
Comments	--		
Finance Manager	Albert Janose	Status	Pending
Comments	--		

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Figure 276

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

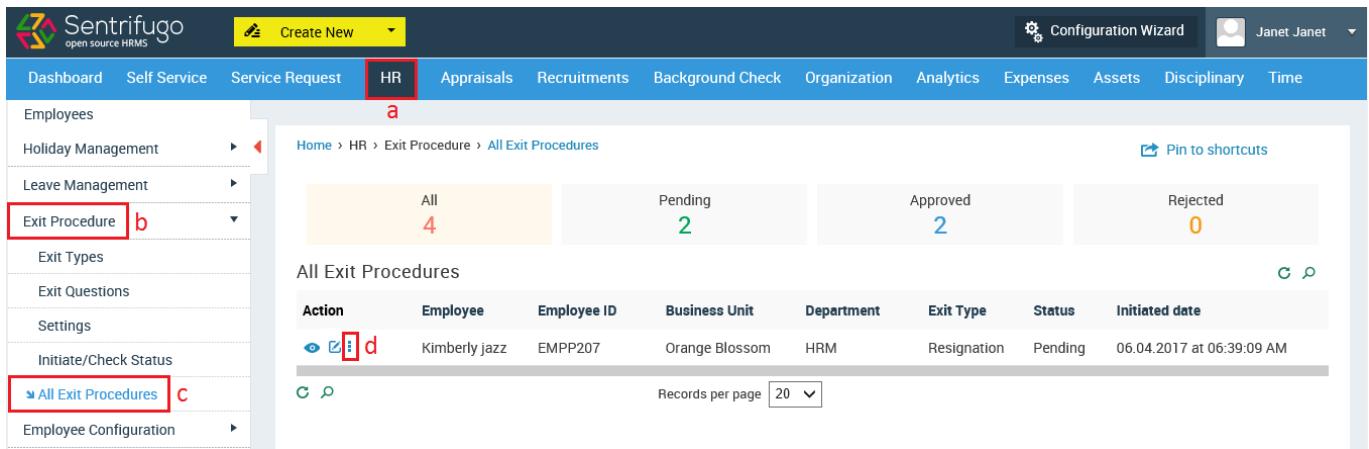


The same procedure (18.5) can be followed by all the roles for providing an approval.

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

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

*Please refer Figure 277*



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

Figure 277

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

*Please refer Figure 278*

Update Overallstatus

This is the final exit procedure status.

Status: * — e	Comments: * — f	Relieving Date:
Select Status		22.05.2017

**Update** g

Employee Details

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

Exit Procedure Details

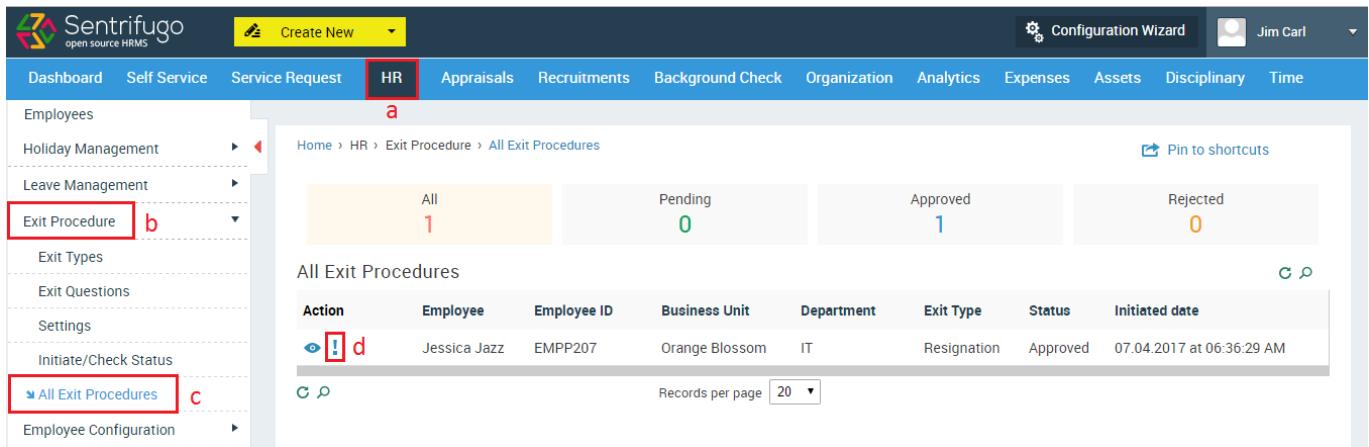
Exit Type	Decimation	Daiced on	07.04.2017
-----------	------------	-----------	------------

Figure 278

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

## 18.7 How do I enable Questions for the Exit Interview?

*Please refer Figure 279*

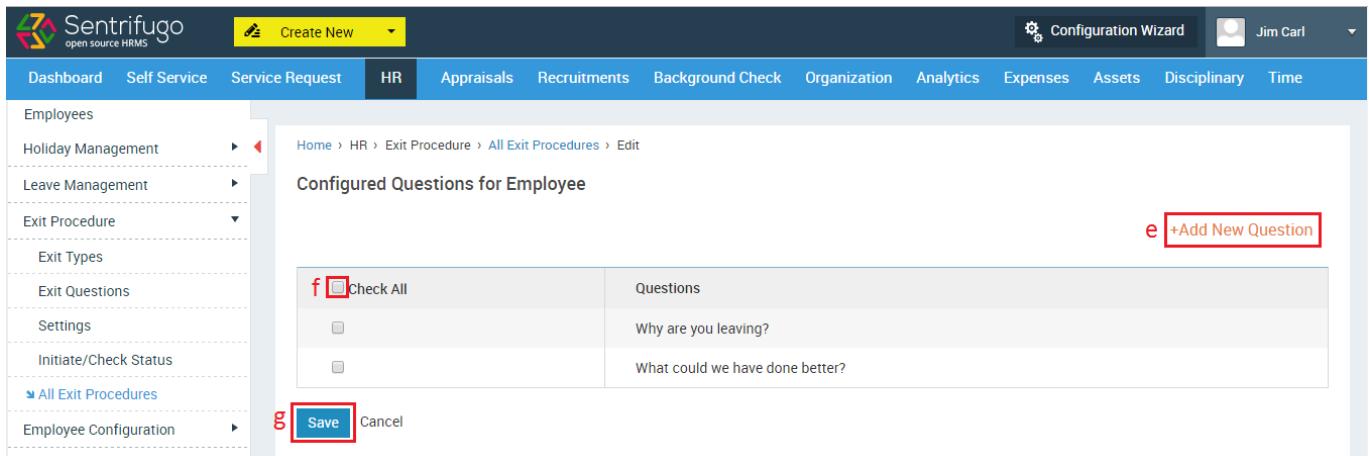


The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Expenses, Assets, Disciplinary, and Time. A user profile for Jim Carl is visible on the right. The left sidebar has sections for Employees, Holiday Management, Leave Management, Exit Procedure (highlighted with a red box), Exit Types, Exit Questions, Settings, Initiate/Check Status, All Exit Procedures (highlighted with a red box), and Employee Configuration. The main content area displays a summary of exit procedures: All (1), Pending (0), Approved (1), and Rejected (0). Below this is a table titled 'All Exit Procedures' with columns for Action, Employee, Employee ID, Business Unit, Department, Exit Type, Status, and Initiated date. One record is listed: Jessica Jazz (EMPP207) from Orange Blossom IT department, Resignation status, Approved, initiated on 07.04.2017 at 06:36:29 AM. There are also 'Create New' and 'Pin to shortcuts' buttons.

Figure 279

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

Please refer Figure 280



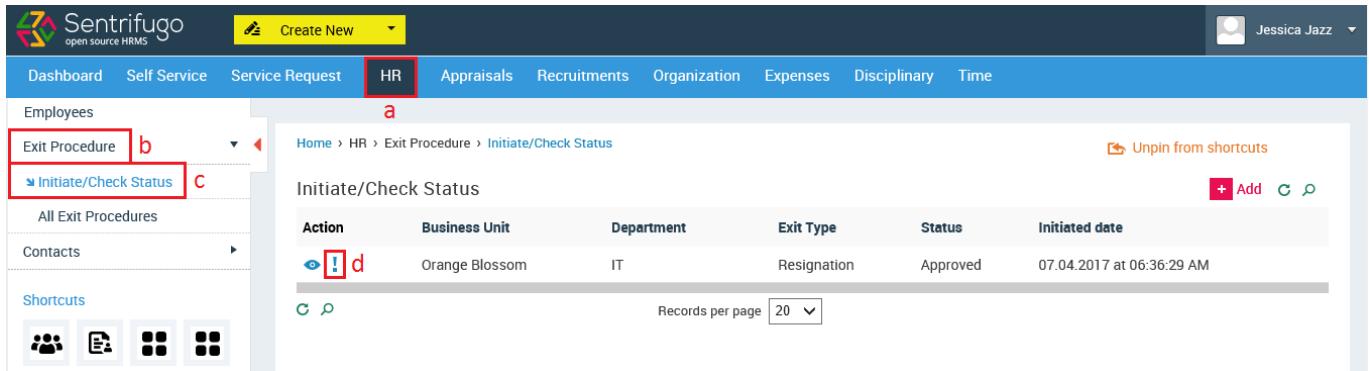
The screenshot shows the 'Configured Questions for Employee' screen. The top navigation and sidebar are identical to Figure 279. The main content area shows a table titled 'Configured Questions for Employee' with a header row 'f' (checkbox) and 'Check All'. Below this are two rows of questions: 'Why are you leaving?' and 'What could we have done better?'. An 'e' (Add New Question) button is located in the top right corner. At the bottom are 'Save' and 'Cancel' buttons, with 'Save' highlighted with a red box.

Figure 280

- Click to add new questions
- Check the checkbox to select questions
- Click **Save** button

## 18.8 How do I answer Questions for the Exit Interview?

Please refer Figure 281

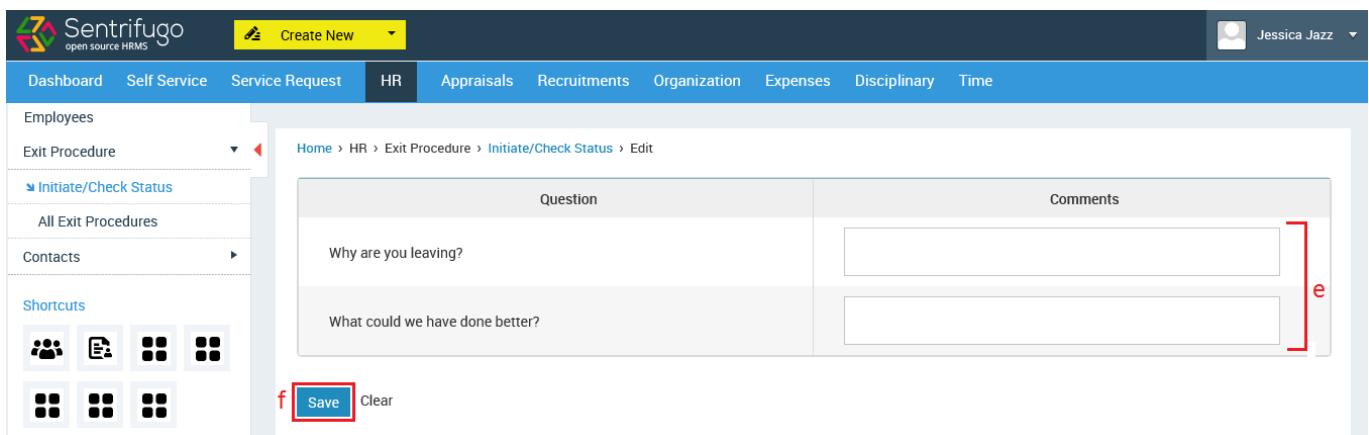


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (which is highlighted with a red box), Appraisals, Recruitments, Organization, Expenses, Disciplinary, and Time. A user profile for 'Jessica Jazz' is visible on the right. The left sidebar has sections for Employees, Exit Procedure (with 'Initiate/Check Status' selected and highlighted with a red box), All Exit Procedures, Contacts, and Shortcuts. The main content area displays a table titled 'Initiate/Check Status' with columns for Action, Business Unit, Department, Exit Type, Status, and Initiated date. One record is listed: Action 'd', Business Unit 'Orange Blossom', Department 'IT', Exit Type 'Resignation', Status 'Approved', and Initiated date '07.04.2017 at 06:36:29 AM'. Navigation icons for back, forward, and search are also present.

Figure 281

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

Please refer Figure 282



The screenshot shows the 'Edit' screen for an exit procedure question. The top navigation bar and sidebar are identical to Figure 281. The main content area shows a table with two rows. The first row contains the question 'Why are you leaving?' and a large empty 'Comments' text area. The second row contains the question 'What could we have done better?' and another large empty 'Comments' text area. A red bracket labeled 'e' spans both 'Comments' fields. At the bottom, there are 'Save' and 'Clear' buttons, with 'Save' highlighted by a red box.

Figure 282

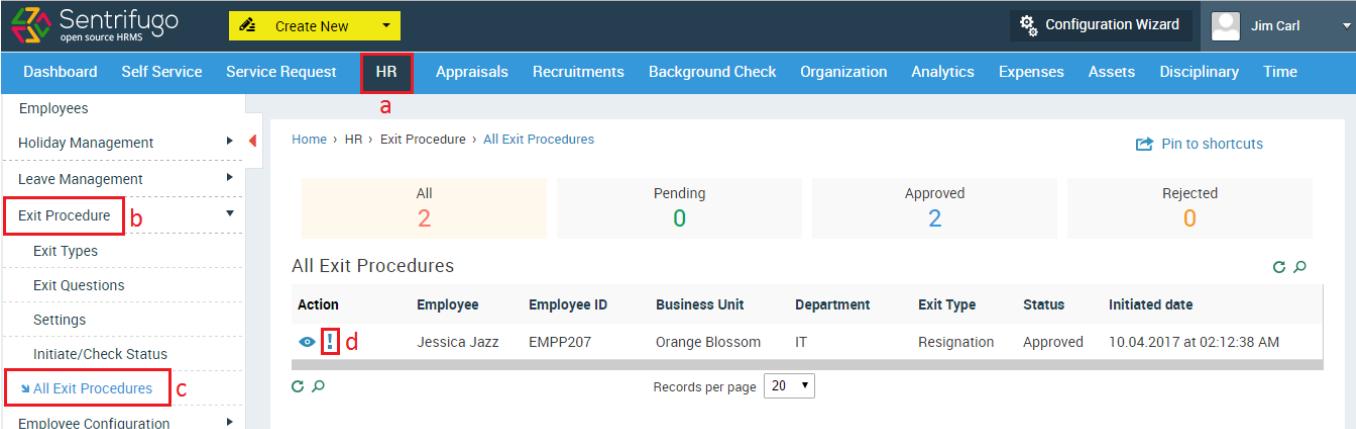
- Enter Comments
- Click **Save** button



An email notification will be sent to the employee.

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

Please refer Figure 283



The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes links for Create New, Configuration Wizard, and user Jim Carl. The main menu has tabs for Dashboard, Self Service, Service Request, HR (which is highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Expenses, Assets, Disciplinary, and Time.

The left sidebar menu lists: Employees, Holiday Management, Leave Management, **Exit Procedure** (highlighted with a red box), Exit Types, Exit Questions, Settings, Initiate/Check Status, **All Exit Procedures** (highlighted with a red box), and Employee Configuration.

The main content area displays a summary of exit procedures: All (2), Pending (0), Approved (2), and Rejected (0). Below this is a table titled "All Exit Procedures" with columns: Action, Employee, Employee ID, Business Unit, Department, Exit Type, Status, and Initiated date. One record is listed:

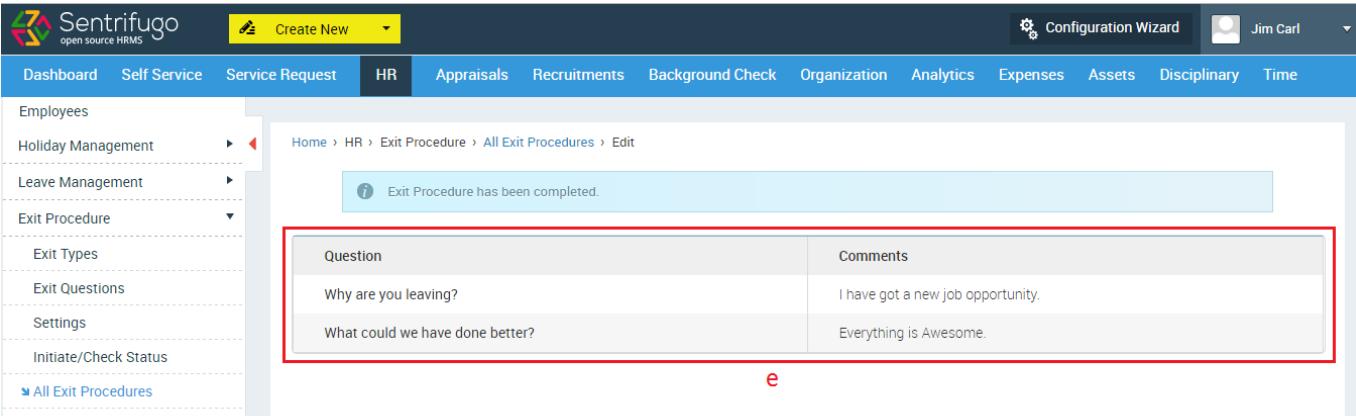
Action	Employee	Employee ID	Business Unit	Department	Exit Type	Status	Initiated date
	Jessica Jazz	EMPP207	Orange Blossom	IT	Resignation	Approved	10.04.2017 at 02:12:38 AM

At the bottom of the table are "Records per page" dropdown and search/filter icons.

Figure 283

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

Please refer Figure 284



The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes links for Create New, Configuration Wizard, and user Jim Carl. The main menu has tabs for Dashboard, Self Service, Service Request, HR (which is highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Expenses, Assets, Disciplinary, and Time.

The left sidebar menu lists: Employees, Holiday Management, Leave Management, Exit Procedure, Exit Types, Exit Questions, Settings, Initiate/Check Status, **All Exit Procedures**, and Employee Configuration.

The main content area shows a message: "Exit Procedure has been completed." Below this is a table with two rows, each containing a question and its corresponding comment. The entire table is highlighted with a red box.

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

Figure 284

## e. Feedback of Exit Interview

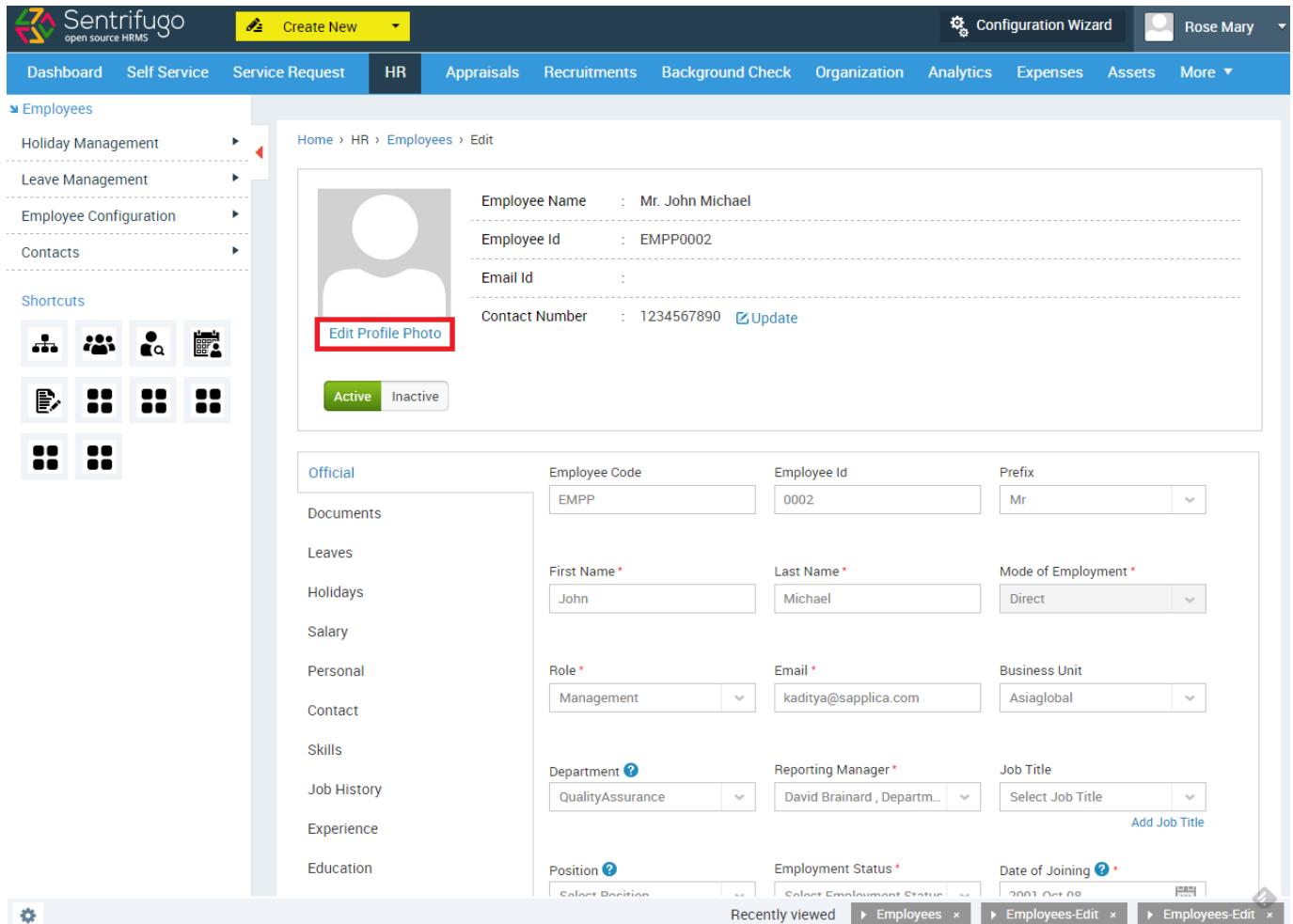


An employee's Exit Procedure can be viewed by Super Admin/Management/HR.

# 19. Additional Features

## Upload Employees' Profile Photo as HR

HR can now upload employees' profile photos.



The screenshot shows the HR module's employee edit screen. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, Appraisals, Recruitments, Background Check, Organization, Analytics, Expenses, Assets, and More. Below the navigation is a sidebar with sections for Holiday Management, Leave Management, Employee Configuration, and Contacts, along with various shortcuts. The main content area displays an employee's details: Name (Mr. John Michael), Employee ID (EMPP0002), Email Id (empty), and Contact Number (1234567890). There's a blue 'Update' button. Below this, there are tabs for Active and Inactive status. The right side of the screen contains several input fields grouped under categories: Official (Employee Code: EMPP, Employee Id: 0002, Prefix: Mr), Personal (First Name: John, Last Name: Michael, Mode of Employment: Direct), and Professional (Role: Management, Email: kaditya@sapplica.com, Business Unit: Asiaglobal). Further down are fields for Department (QualityAssurance), Reporting Manager (David Brainard, Department), Job Title (Select Job Title), Position (Select Position), Employment Status (Select Employment Status), and Date of Joining (2011 Oct 01). At the bottom, there are buttons for Recently viewed, Employees, and a breadcrumb trail showing the current path: Employees > Employees-Edit > Employees-Edit.

## HR Configuration Wizard

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

It consists of 3 steps:

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

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

1  **Configure Leave Types**  
Configure the leave types used in your organization.  
**In Progress**

2  **Configure Holidays**  
Configure the holidays used in your organization.  
**In Progress**

3  **Appraisals**  
Configure the performance appraisal parameters used in your organization.  
**In Progress**

Configure Employee Leave Types

Leave Type \*   
Number of Days \*

 [ADD LEAVE TYPE](#)

**SAVE**

**Next >**

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

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

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

1  **Configure Leave Types**  
Configure the leave types used in your organization.  
**Completed**

2  **Configure Holidays**  
Configure the holidays used in your organization.  
**In Progress**

3  **Appraisals**  
Configure the performance appraisal parameters used in your organization.  
**In Progress**

Configure Holidays

Holiday Group \*  [Select Holiday Group](#) | [▼](#)  
[Add Holiday Group](#)

Holiday \*  Date ? \*  [Calendar](#)

 [ADD HOLIDAY](#)

**SAVE**

**< Prev** **Next >**

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

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

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

 Configure Leave Types	 Completed
Configure the leave types used in your organization.	
 Configure Holidays	 Completed
Configure the holidays used in your organization.	
 Appraisals	 In Progress
Configure the performance appraisal parameters used in your organization.	(3)

Configure Performance Appraisal

[ADD EMPLOYEE](#)

Appraisal Parameter \*

Select Parameter | ▾

Add Parameter

Question \*

Description   
200 characters remaining (200 maximum)

[ADD QUESTION](#)

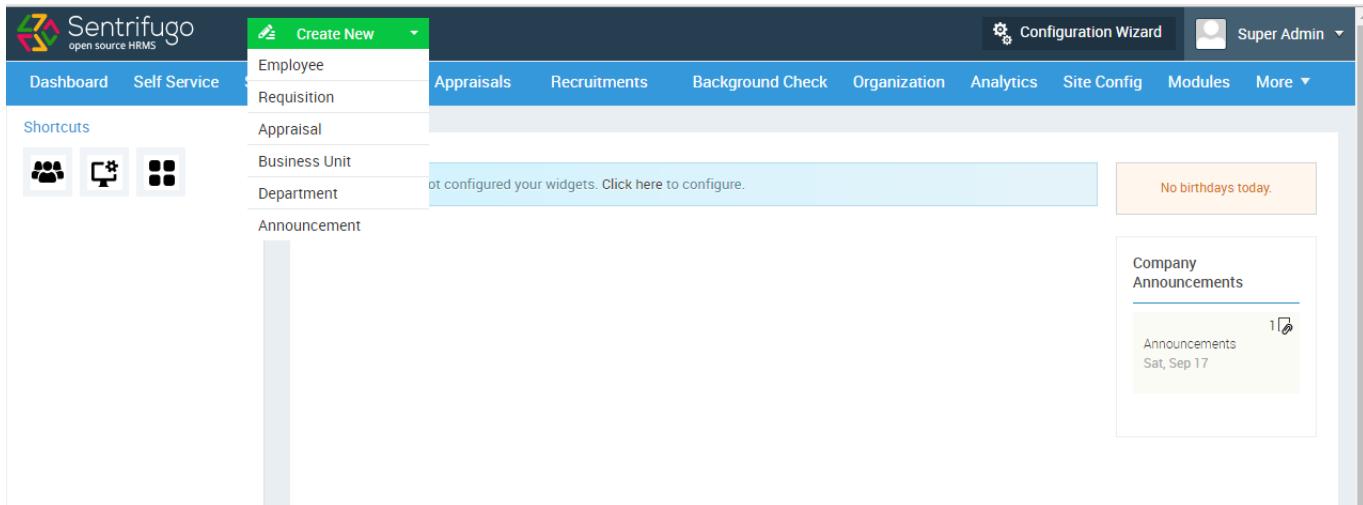
[SAVE](#)

[◀ Prev](#)

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

## Create New Shortcut Button

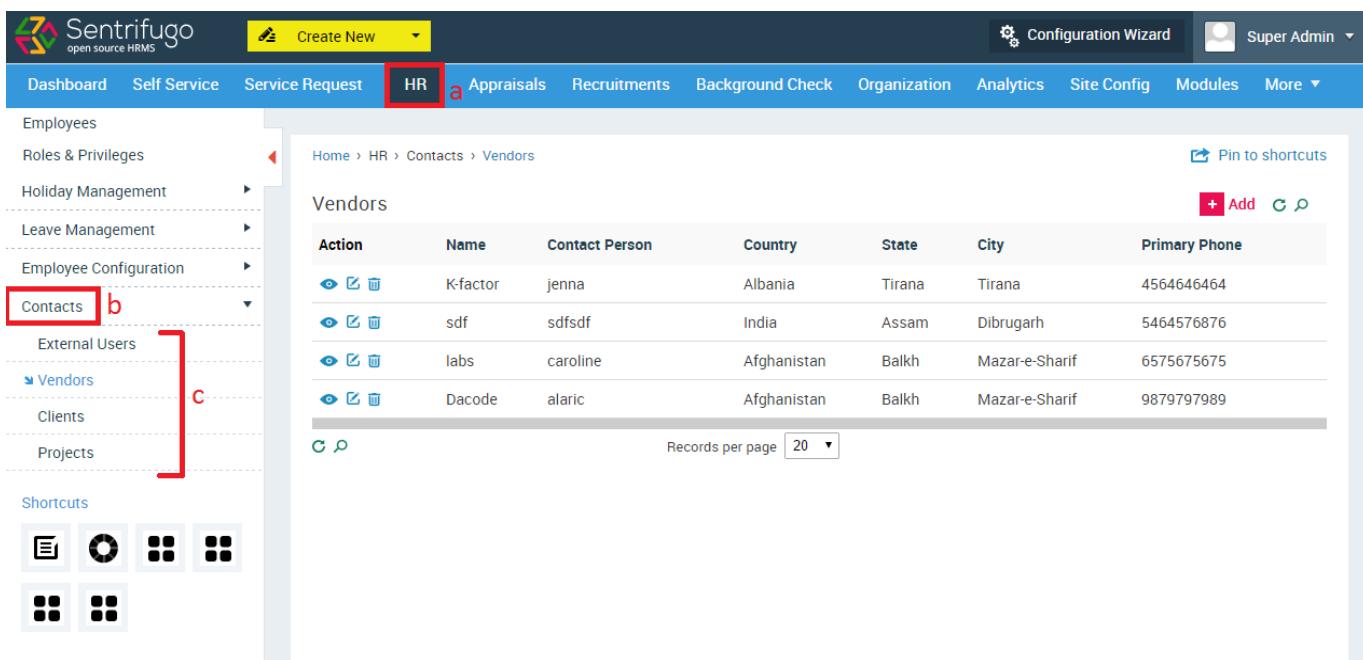
This shortcut button is placed on the top left corner (beside your organization logo) of the application. This button has been designed to save your time from menu redirections. The number of options displayed depends on a user's role privileges. For example, if you belong to the Management role group,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



The screenshot shows the Sentrifugo open source HRMS dashboard. At the top, there's a navigation bar with the Sentrifugo logo, a "Create New" dropdown (Employee, Requisition), a "Configuration Wizard" button, and a "Super Admin" dropdown. Below the navigation bar is a blue header bar with links for Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. On the left, there's a sidebar titled "Shortcuts" with icons for users, reports, and more. A vertical sidebar on the right displays "Company Announcements" with one item: "Announcements Sat, Sep 17".

## Contacts

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



The screenshot shows the "Vendors" page under the "Contacts" section. The top navigation bar includes "Create New" (dropdown), "Configuration Wizard", and "Super Admin". The main menu has "Service Request" highlighted with a red box. The left sidebar has "Contacts" highlighted with a red box, and a red bracket labeled "b" points to it. Another red bracket labeled "c" points to the "Vendors" link in the sidebar. The main content area shows a table of vendors with columns: Action, Name, Contact Person, Country, State, City, and Primary Phone. The table lists four entries: K-factor (Albania, Tirana, Tirana, 4564646464), sdf (India, Assam, Dibrugarh, 5464576876), labs (Afghanistan, Balkh, Mazar-e-Sharif, 6575675675), and Dacode (Afghanistan, Balkh, Mazar-e-Sharif, 9879797989). There are also "Add", "Edit", and "Delete" icons for each row. The bottom of the page shows a "Records per page" dropdown set to 20.

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