

Sentrifugo

User Guide

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Getting Started with Sentrifugo

Three frequently used icons in Sentrifugo:



View Icon



Edit Icon



Delete Icon

Configuration Wizard

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

Set up Configuration Wizard

Information is gathered in 5 steps. The first is the Modules section.

- a. All the modules are displayed in circular representation
- b. Click on the module icon to make it activate or inactive
- c. Click on Save to apply the changes made
- d. Click on Next to proceed to the next step

Refer Figure 1

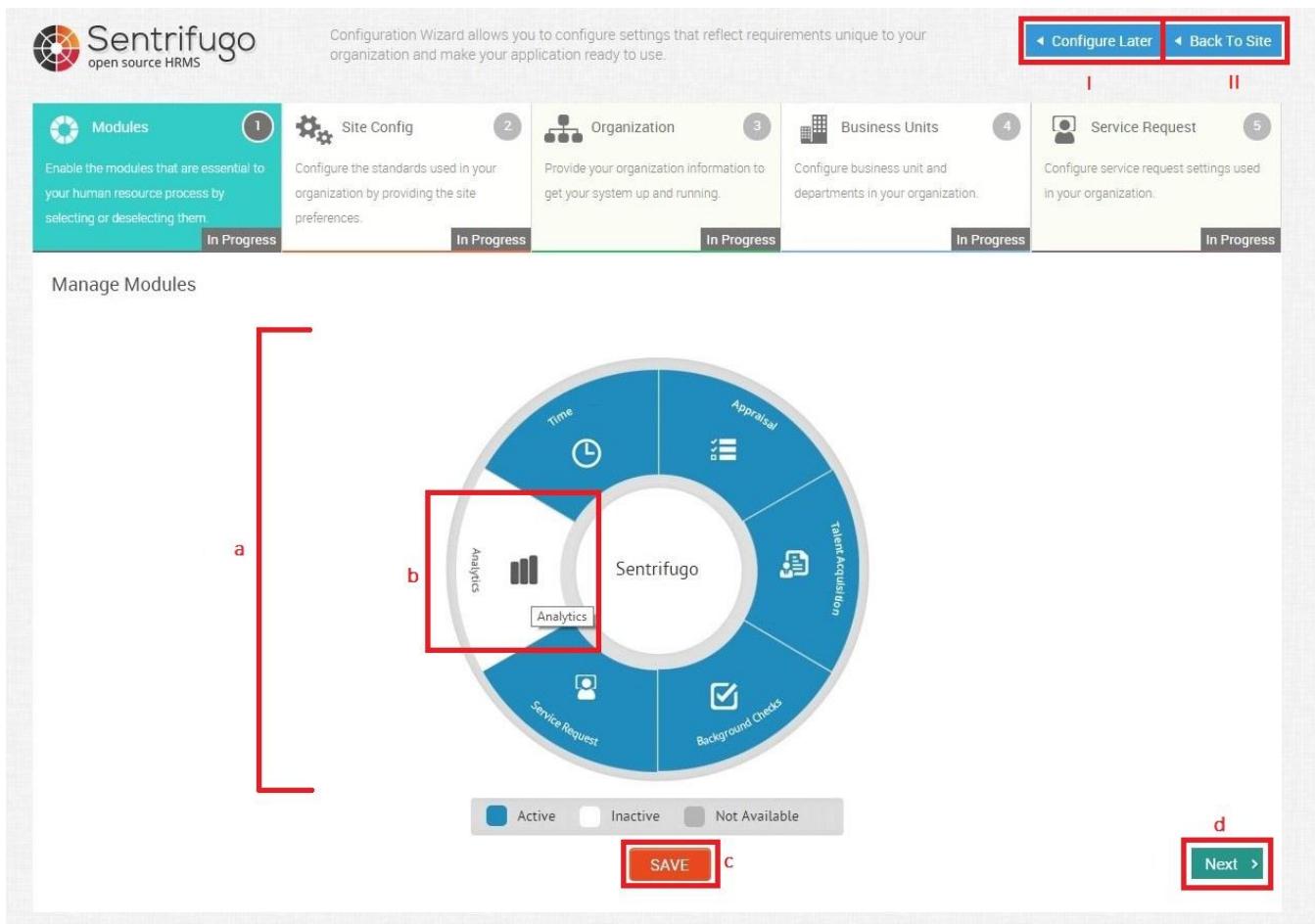


Figure 1

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

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

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

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 1.1

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

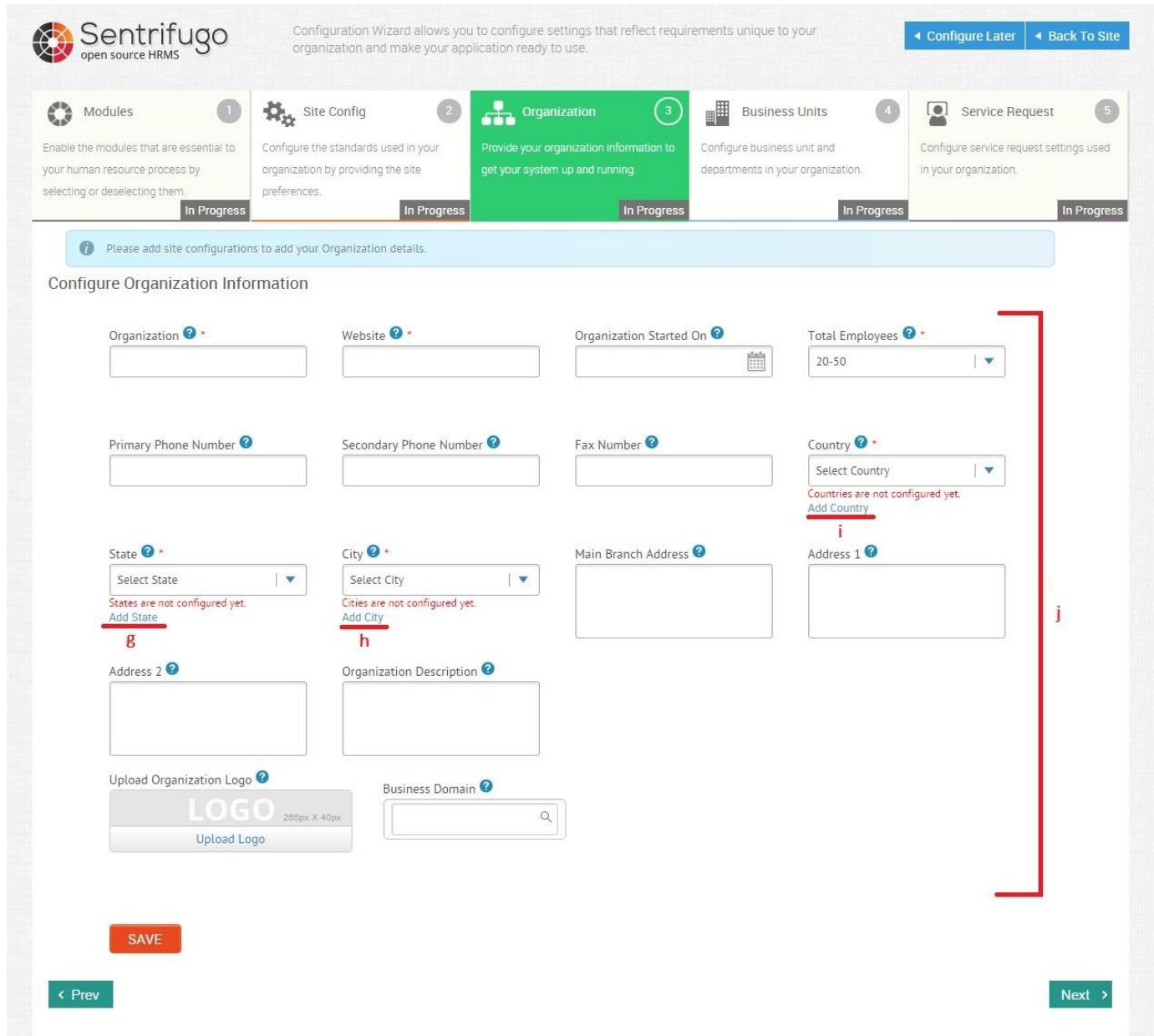
Timezone

Time zone ? *	Description
<input type="button" value="Select"/> ▾	200 characters remaining (200 maximum)
Africa/Abidjan [GMT]	
Africa/Accra [GMT]	
Africa/Addis_Ababa [EAT]	
Africa/Algiers [CET]	
Africa/Asmara [EAT]	
Africa/Bamako [GMT]	
Africa/Bangui [WAT]	

Figure 1.2

In the **Organization** section, provide organization information

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



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**

Organization In Progress

Please add site configurations to add your Organization details.

Configure Organization Information

Organization * <input type="text"/>	Website * <input type="text"/>	Organization Started On ? <input type="text"/>	Total Employees * 20-50 ▾
Primary Phone Number ? <input type="text"/>	Secondary Phone Number ? <input type="text"/>	Fax Number ? <input type="text"/>	Country * Select Country ▾ Countries are not configured yet. Add Country i
State * Select State ▾ States are not configured yet. Add State g	City * Select City ▾ Cities are not configured yet. Add City h	Main Branch Address ? <input type="text"/>	Address 1 ? <input type="text"/>
Address 2 ? <input type="text"/>	Organization Description ? <input type="text"/>	Upload Organization Logo ? LOGO 285px X 40px Upload Logo	
		Business Domain ? <input type="text"/>	

SAVE

◀ Prev | **Next ▶**

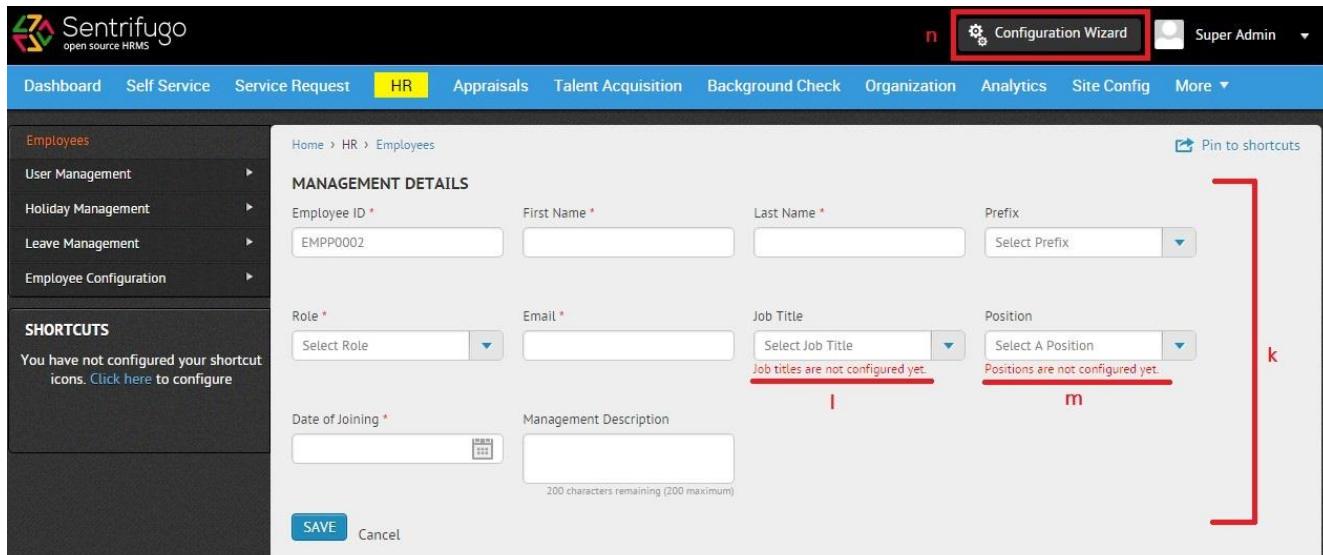
Figure 1.3

After saving your organization's details, a **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. The first employee you add (Employee #2) will be the head of the organization.

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

On clicking **ADD EMPLOYEE** the below screen will appear:

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

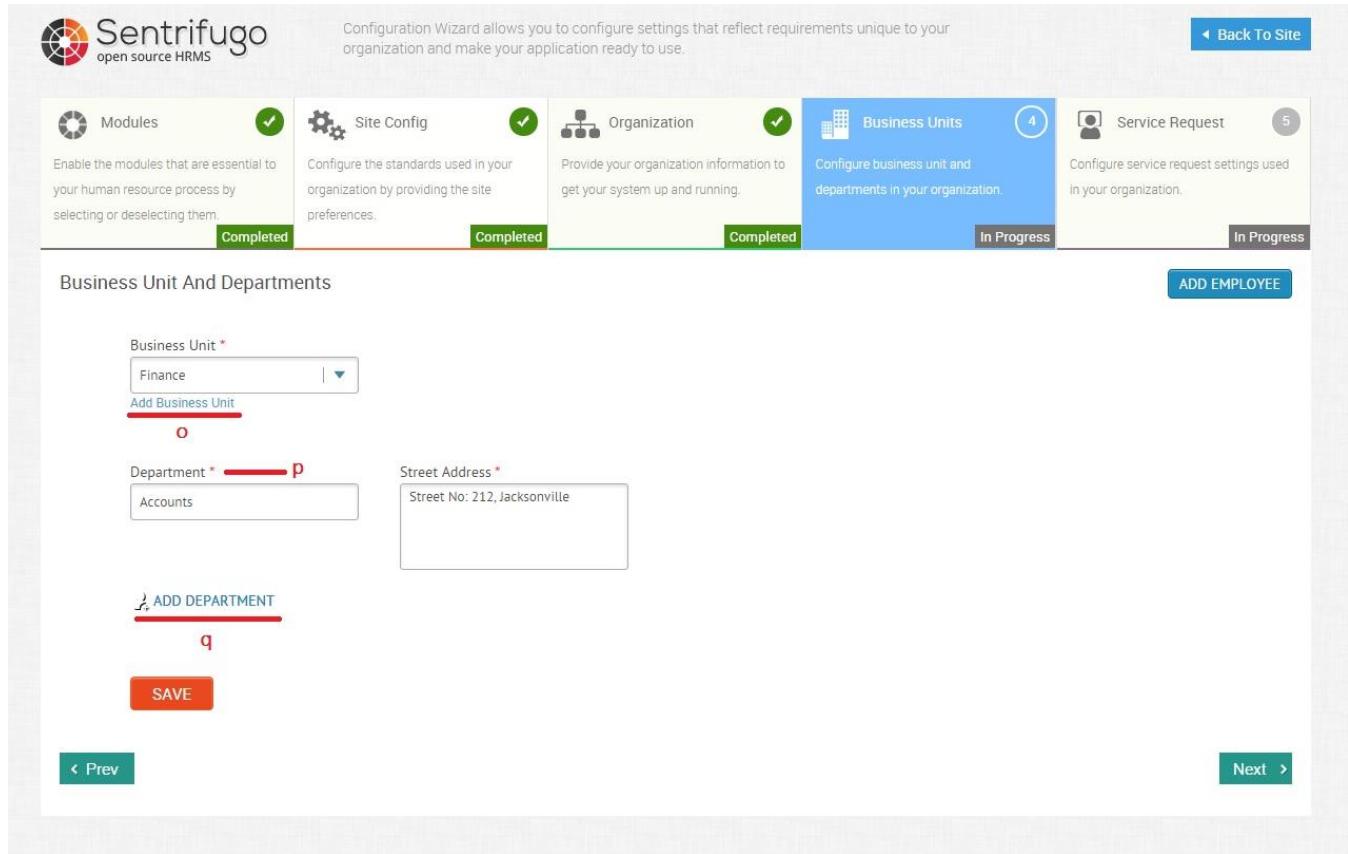


The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (which is highlighted in yellow), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the far right, there is a 'Super Admin' dropdown menu. The main content area is titled 'MANAGEMENT DETAILS'. It contains fields for Employee ID (EMPP0002), First Name, Last Name, Prefix, Role, Email, Job Title (with a validation message 'Job titles are not configured yet.'), Position (with a validation message 'Positions are not configured yet.'), Date of Joining, and Management Description. At the bottom are 'SAVE' and 'Cancel' buttons. A sidebar on the left lists 'User Management', 'Holiday Management', 'Leave Management', and 'Employee Configuration'. A 'SHORTCUTS' section notes that no shortcut icons are configured yet.

Figure 1.4

The next section is **Business Units**, this is where the business units and departments can be created.

- o. Create a new business unit by giving its name and street address.
- p. Create a new department within the business unit
- q. Add another department (To have multiple departments under a business unit)



The screenshot shows the Sentrifugo Configuration Wizard interface. At the top, there's a navigation bar with the Sentrifugo logo and a "Back To Site" button. Below the navigation, a progress bar indicates the steps completed so far:

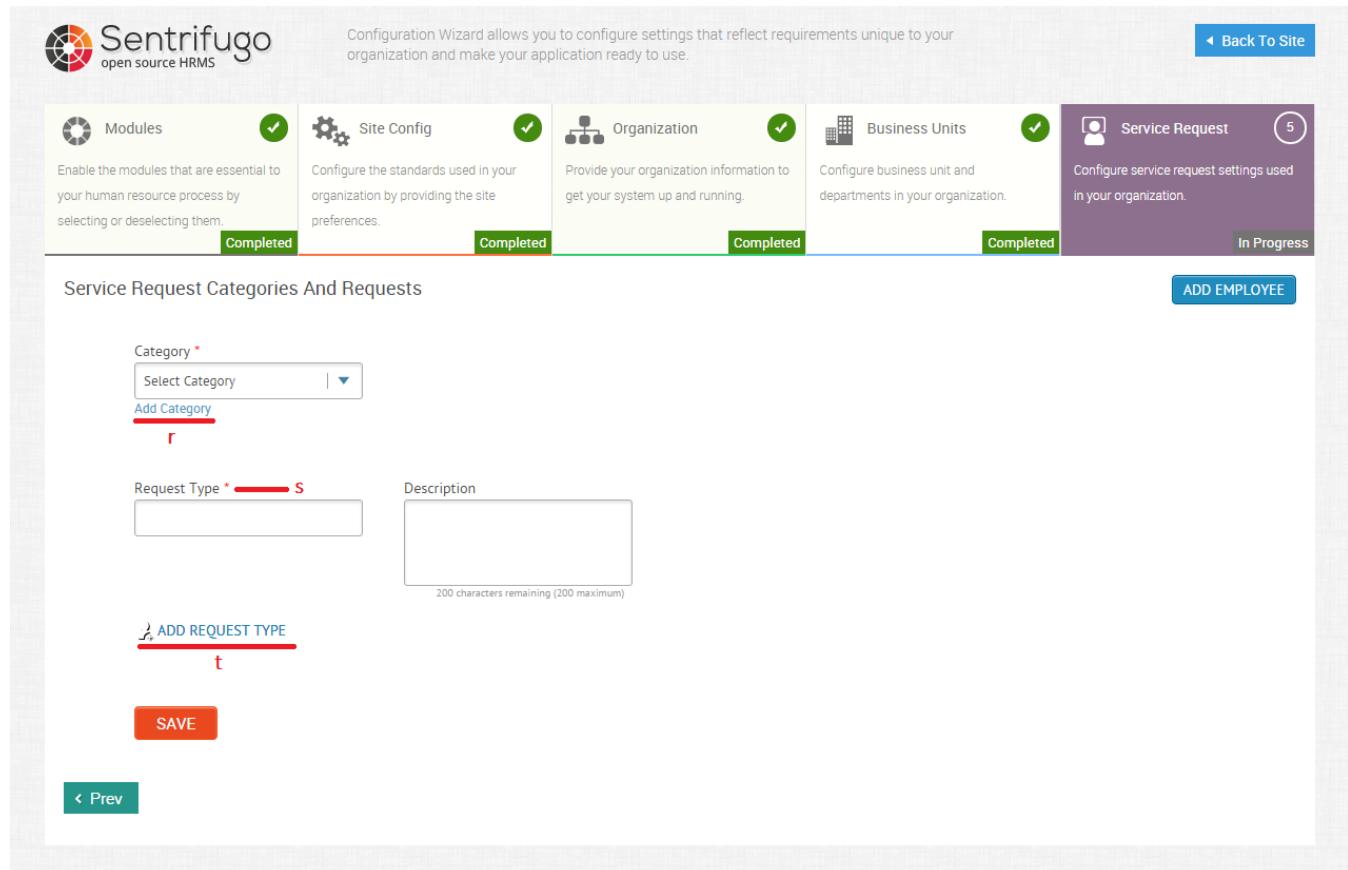
- Modules**: Completed
- Site Config**: Completed
- Organization**: Completed
- Business Units**: In Progress (highlighted in blue)
- Service Request**: In Progress

The main content area is titled "Business Unit And Departments". It contains fields for "Business Unit *": "Finance" (with a dropdown arrow), "Department *": "Accounts" (with a red underline and the letter "p" next to it), and "Street Address *": "Street No: 212, Jacksonville". There are buttons for "ADD DEPARTMENT" (underlined in red with the letter "q" next to it) and "SAVE". Navigation buttons at the bottom include "< Prev" and "Next >".

Figure 1.5

The final section in configuration wizard is **Service Request**.

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



Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use. [◀ Back To Site](#)

Module	Status	Description
Modules	Completed	Enable the modules that are essential to your human resource process by selecting or deselecting them.
Site Config	Completed	Configure the standards used in your organization by providing the site preferences.
Organization	Completed	Provide your organization information to get your system up and running.
Business Units	Completed	Configure business unit and departments in your organization.
Service Request	In Progress	Configure service request settings used in your organization.

Service Request Categories And Requests

[ADD EMPLOYEE](#)

Category * | ▾
[Add Category](#)

Request Type * t

Description

[ADD REQUEST TYPE](#) t

[SAVE](#)

[◀ Prev](#)

Figure 1.6

Click on [◀ Back To Site](#) to go back to the application site and exit the configuration wizard.

Note: Ensure that you always [SAVE](#) after entering details in each section of the Configuration Wizard and only then proceed.

Setting up the 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 your colleagues' upcoming birthday updates and announcements for a department/business unit from your management.

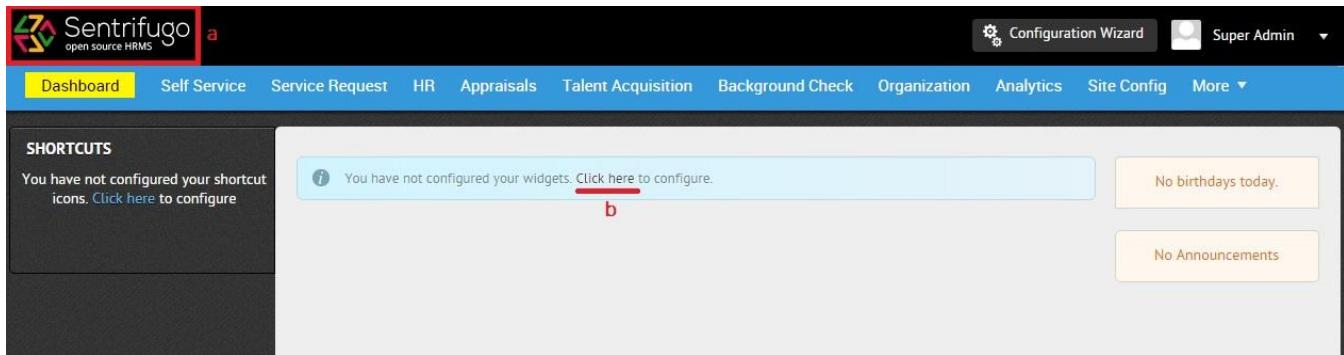


Figure 2

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

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

Or

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

Or

- Click on Settings icon in the bottom left corner of the page

(Common for all)

- Select Widgets button in the settings page
- Drag and drop the selected menu item(s) in the widgets box
- Click on Save to add Widgets in the Widgets pane

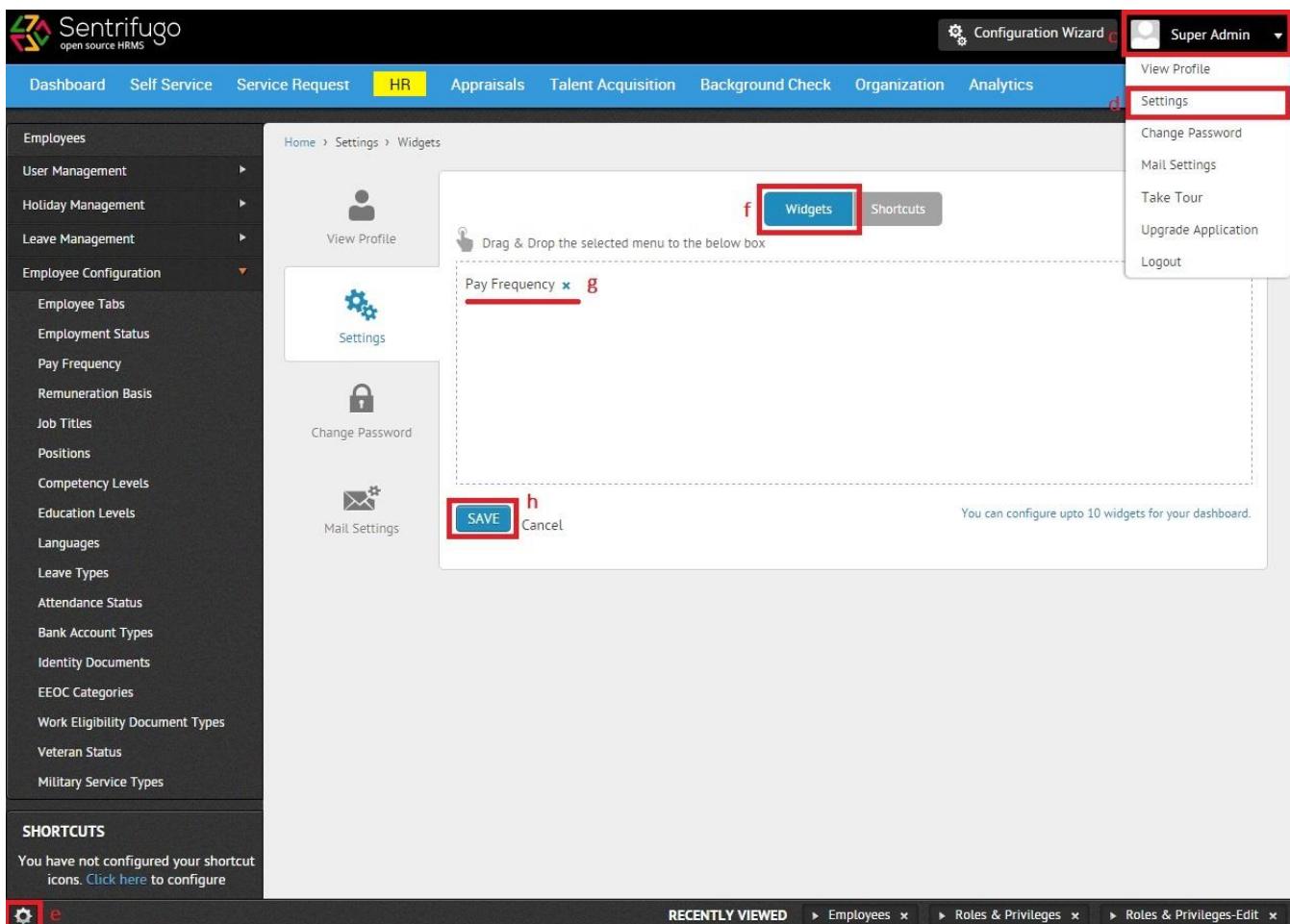


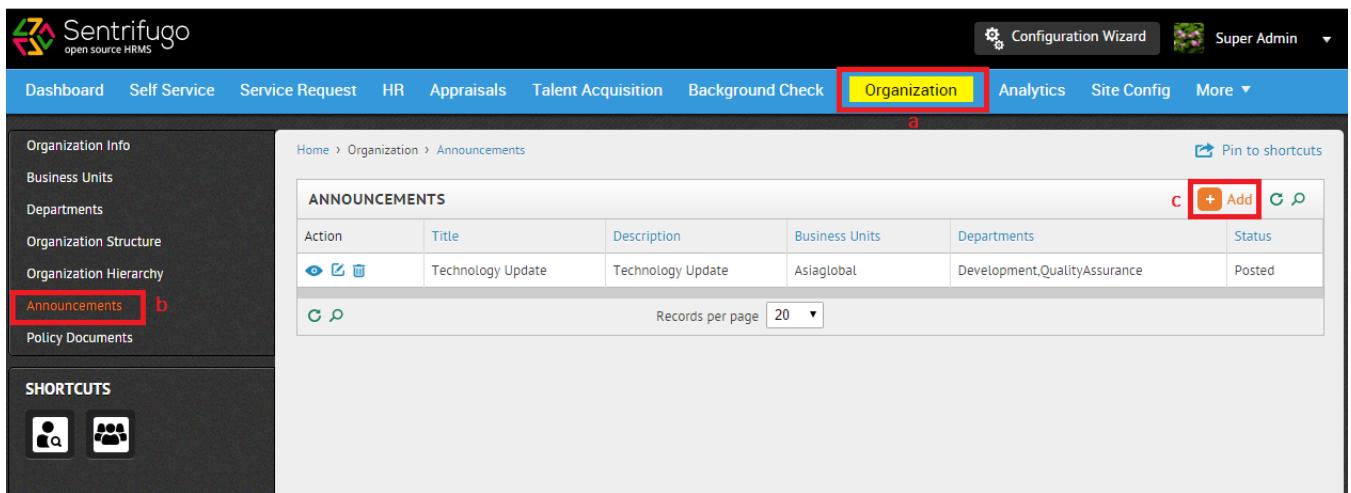
Figure 2.1

Note: Click on 'Cancel' to exit the widgets screen.

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

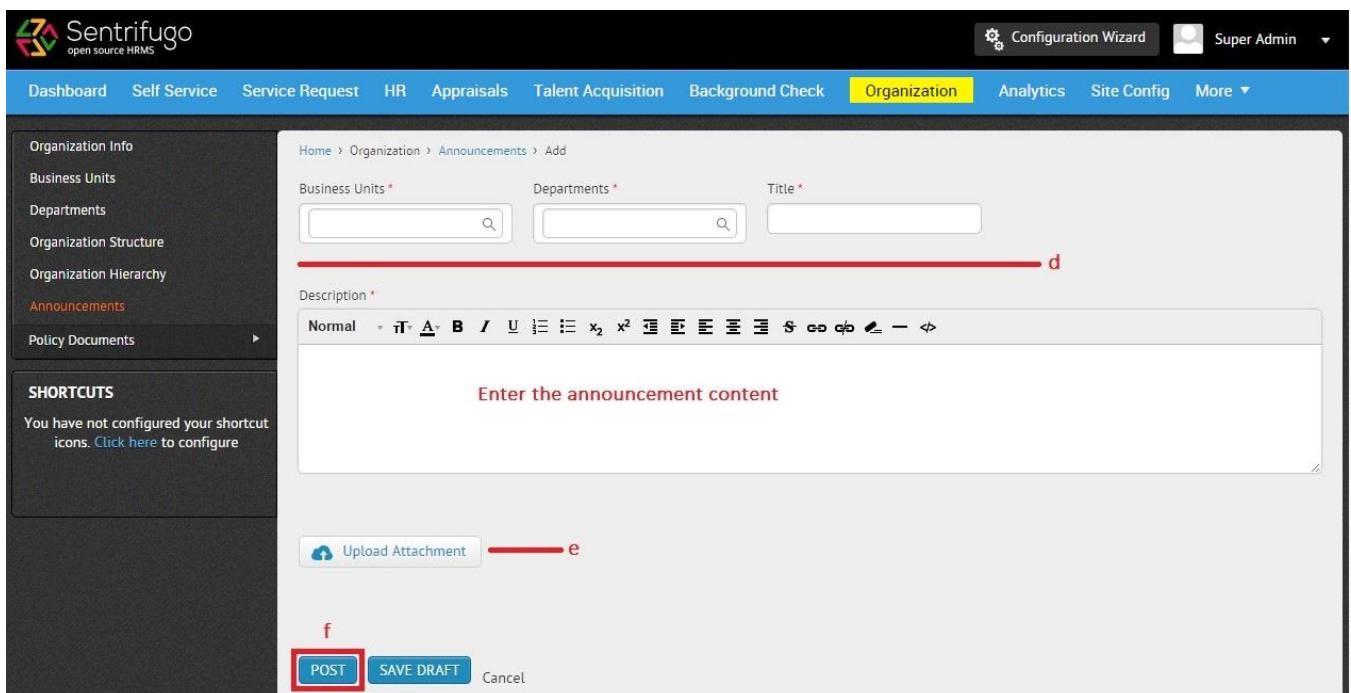
- a. Click on 'Organization' in the top menu
- b. Click on Announcements
- c. Click on Add
- d. Select the business unit(s), department and title
- e. Upload attachments if required
- f. Click on Post to publish the announcements

Refer Figure 3 & 3.1



The screenshot shows the Sentrifugo web interface. The top navigation bar includes links for Configuration Wizard, Super Admin, Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization (highlighted with a yellow box), Analytics, Site Config, and More. A sidebar on the left contains links for Organization Info, Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements (highlighted with a red box), Policy Documents, and Shortcuts (with icons for user and group search). The main content area displays a table titled "ANNOUNCEMENTS" with columns for Action, Title, Description, Business Units, Departments, and Status. One row is visible: "Technology Update" under "Title", "Technology Update" under "Description", "Asiaglobal" under "Business Units", "Development,QualityAssurance" under "Departments", and "Posted" under "Status". Below the table are search and record count controls. A large blue arrow points downwards from the top of the page towards Figure 3.1.

Figure 3

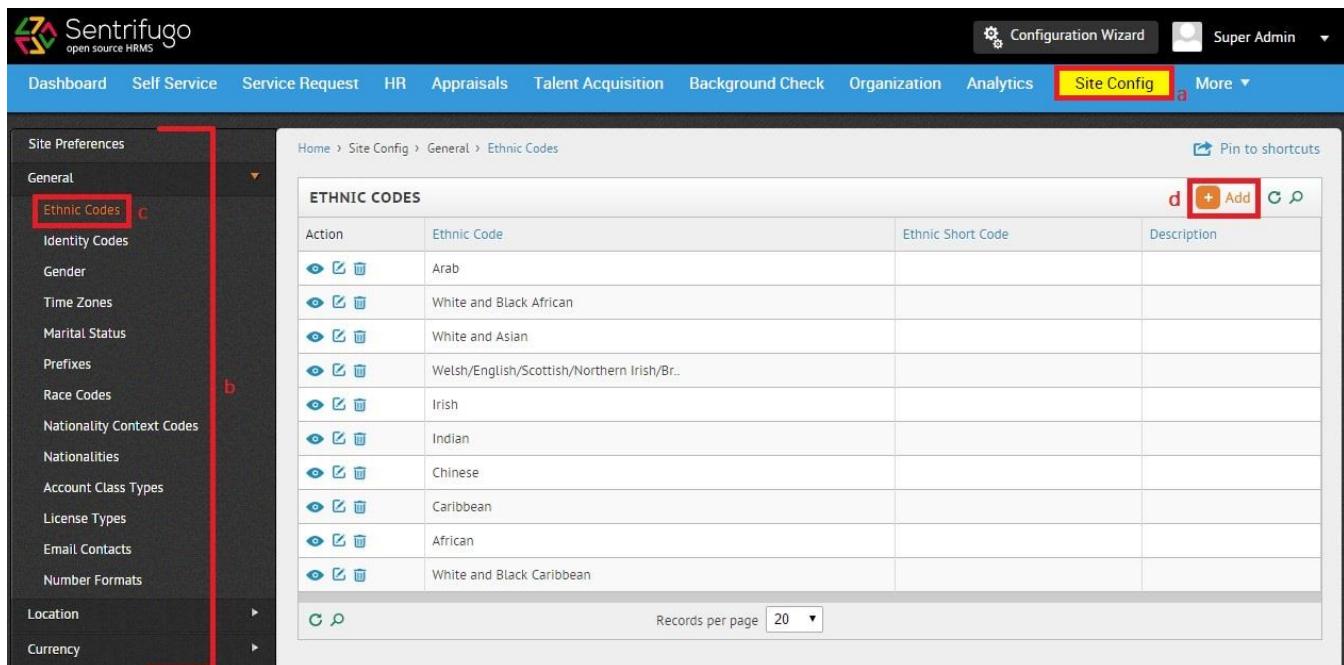



The screenshot shows the "Add Announcement" form. The top navigation bar and sidebar are identical to Figure 3. The main content area shows a form with fields for Business Units*, Departments*, Title*, and Description*. The Description field is highlighted with a red box labeled "d". Below the form is a rich text editor toolbar. A text area labeled "Enter the announcement content" is present. At the bottom is an "Upload Attachment" button, which is highlighted with a red box labeled "e". At the very bottom are three buttons: "POST" (highlighted with a red box labeled "f"), "SAVE DRAFT", and "Cancel".

Figure 3.1

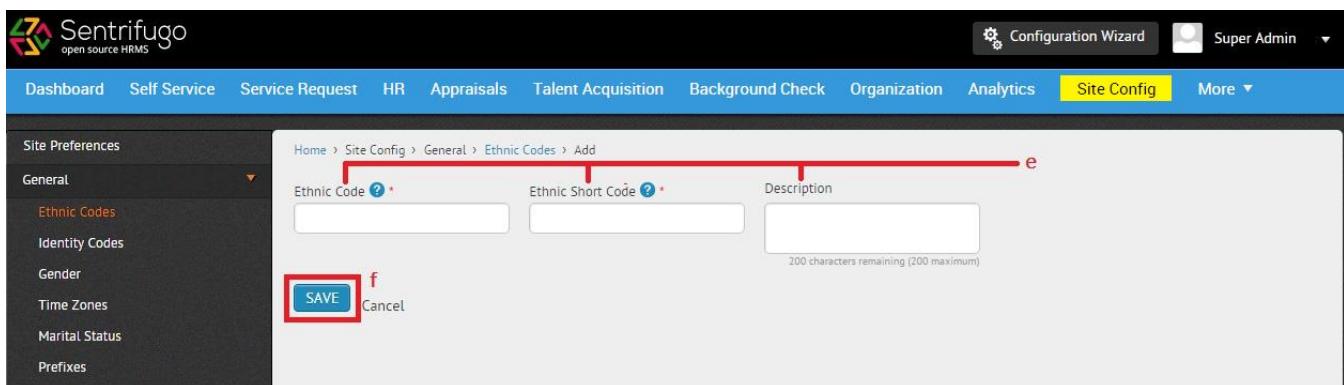
Configure Site Config within the Application

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



The screenshot shows the Sentrifugo application interface. The top navigation bar includes links for Configuration Wizard, Super Admin, Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config (highlighted with a yellow box), and More. The left sidebar is titled 'Site Preferences' and contains a 'General' section with various submenu items: Ethnic Codes (highlighted with a red box), Identity Codes, Gender, Time Zones, Marital Status, Prefixes, Race Codes, Nationality Context Codes, Nationalities, Account Class Types, License Types, Email Contacts, Number Formats, Location, and Currency. The main content area displays a table titled 'ETHNIC CODES' with columns for Action, Ethnic Code, Ethnic Short Code, and Description. The table lists ethnic groups like Arab, White and Black African, White and Asian, Welsh/English/Scottish/Northern Irish/Br..., Irish, Indian, Chinese, Caribbean, African, and White and Black Caribbean. At the bottom of the table are search and records per page controls.

Figure 4

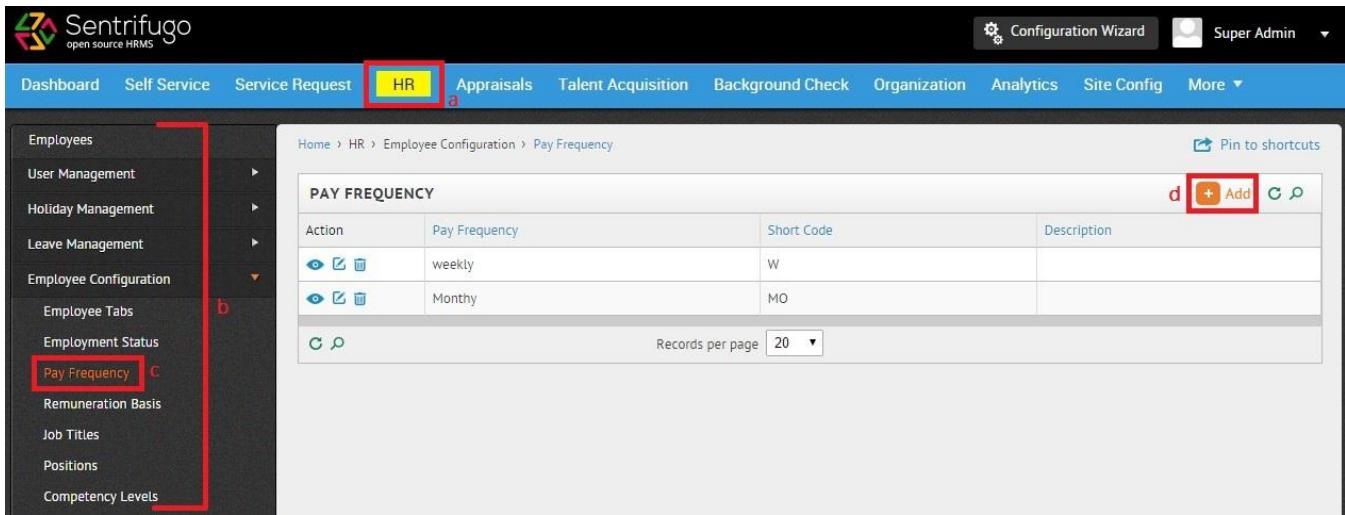



This screenshot shows the 'Add' screen for Ethnic Codes within the Site Config General section. The left sidebar is identical to Figure 4. The main content area has a header 'Home > Site Config > General > Ethnic Codes > Add'. It contains three input fields: 'Ethnic Code' (with a red box highlighting it), 'Ethnic Short Code' (with a red box highlighting it), and 'Description'. Below these fields is a note '200 characters remaining (200 maximum)'. At the bottom left is a blue 'SAVE' button (highlighted with a red box), and at the bottom right is a 'Cancel' link.

Figure 4.1

Set Employee Configurations

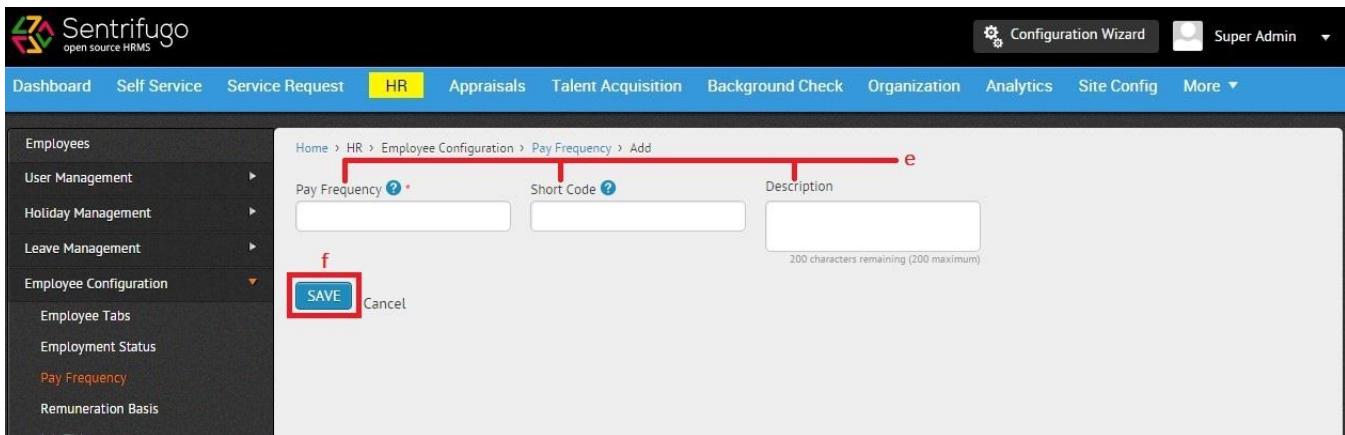
- a. Click on Human Resource in the top menu
- b. The left side panel will display the submenus
- c. Click on the Employee Configurations in the submenu
- d. Click on the Add button on the right side panel
- e. Enter the required details
- f. Click Save button to save the details



The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes links for Configuration Wizard, Super Admin, Dashboard, Self Service, Service Request, HR (highlighted with a yellow box), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. The left sidebar has a tree view with categories like Employees, User Management, Holiday Management, Leave Management, Employee Configuration (highlighted with a red box), Employee Tabs, Employment Status, Pay Frequency (highlighted with a red box), Remuneration Basis, Job Titles, Positions, and Competency Levels. The main content area displays a table titled 'PAY FREQUENCY' with two rows: 'weekly' (short code W) and 'Monthly' (short code MO). A blue arrow points down from this screenshot to the next one.

Action	Pay Frequency	Short Code	Description
	weekly	W	
	Monthly	MO	

Figure 5

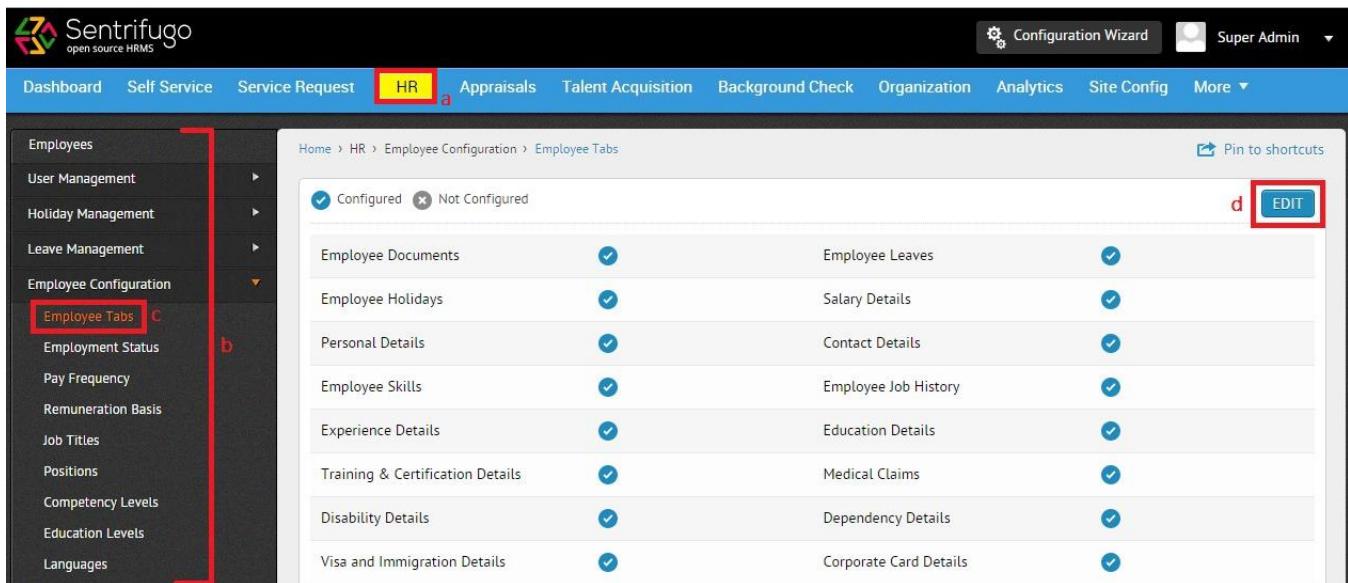



The screenshot shows the 'Add' form for 'Pay Frequency'. The left sidebar is identical to Figure 5. The main form has fields for 'Pay Frequency' (with a red box around it), 'Short Code' (with a red box around it), and 'Description' (with a red box around it). Below these fields are buttons for 'SAVE' (highlighted with a red box) and 'Cancel'. A blue arrow points down from this screenshot to the next one.

Figure 5.1

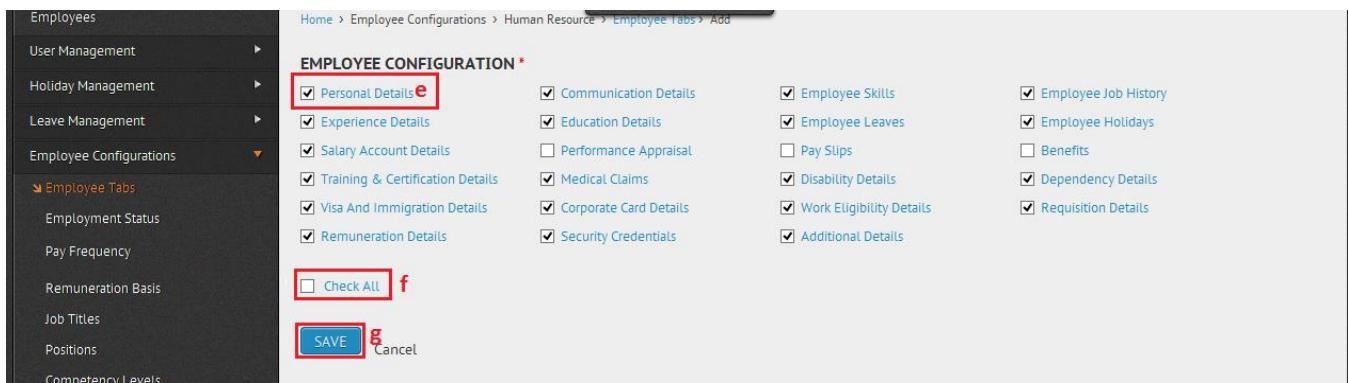
Configure Tabs for Employees

- a. Click on HR in the top menu
- b. The left side panel will display the submenus
- c. Click on Employee Tabs
- d. Click on Edit button to configure tabs for employees
- e. To enable specific tabs for employees, check individual checkboxes with respect to desired tabs
- f. To enable all the tabs for employees, check “Check All” checkbox
- g. Click on Save to save the changes



Employee Details		Employee Leaves	
<input checked="" type="checkbox"/> Employee Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Employee Leaves	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Employee Holidays	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Salary Details	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Personal Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Contact Details	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Employee Skills	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Employee Job History	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Experience Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Education Details	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Training & Certification Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Medical Claims	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Disability Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Dependency Details	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Visa and Immigration Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Corporate Card Details	<input checked="" type="checkbox"/>

Figure 6

EMPLOYEE CONFIGURATION *			
<input checked="" type="checkbox"/> Personal Details	<input checked="" type="checkbox"/> Communication 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"/> Employee Leaves	<input checked="" type="checkbox"/> Employee Holidays
<input checked="" type="checkbox"/> Salary Account Details	<input type="checkbox"/> Performance Appraisal	<input type="checkbox"/> Pay Slips	<input type="checkbox"/> Benefits
<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"/> Requisition Details
<input checked="" type="checkbox"/> Remuneration Details	<input checked="" type="checkbox"/> Security Credentials	<input checked="" type="checkbox"/> Additional Details	

Figure 6.1

Add an Organization

- a. Click on 'Organization' in the top menu
- b. The left side panel will display the submenus
- c. Click on Organization Info
- d. Click on Click Here link in the right side panel
- e. Enter the required details
- f. Upload your organization logo
- g. Click on save after filling in all the details.



Figure 7

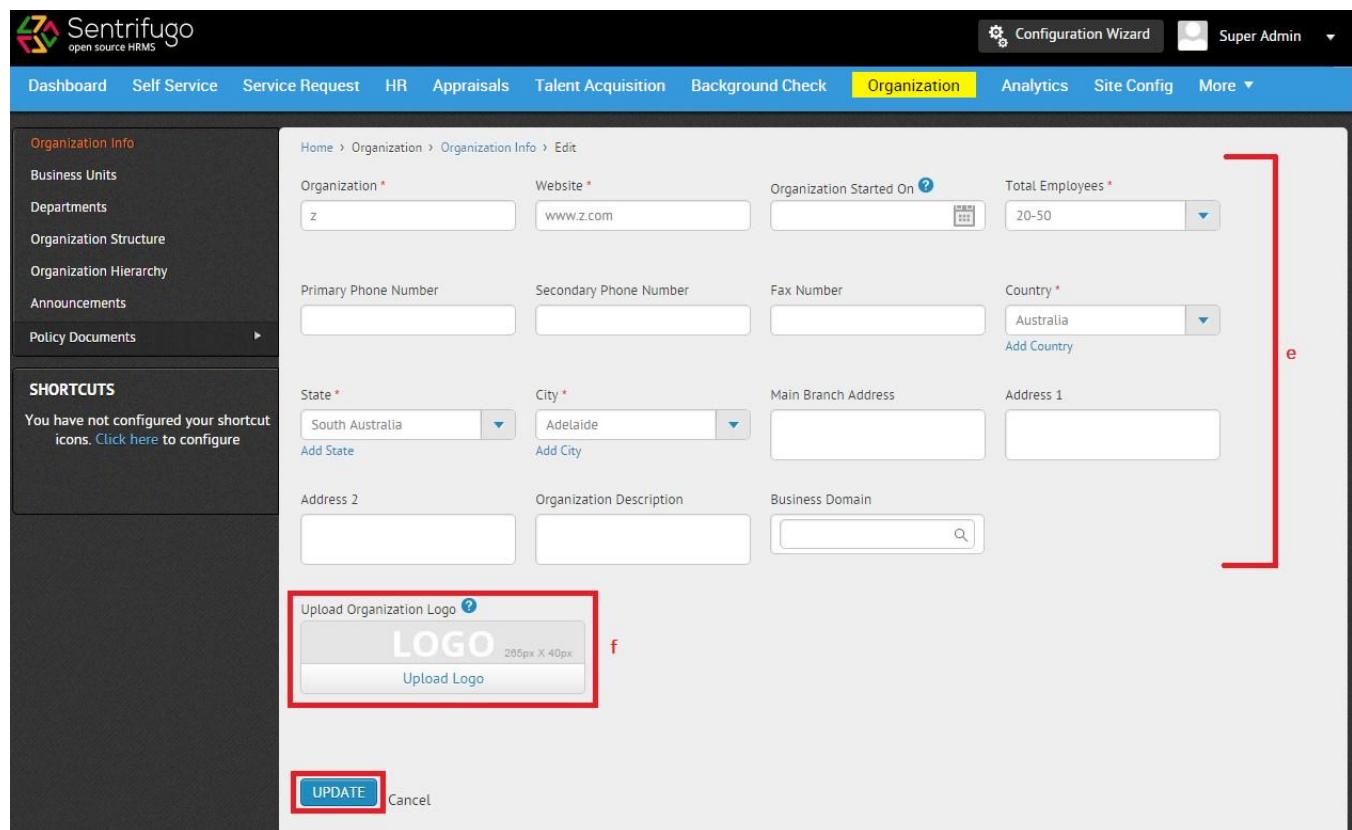
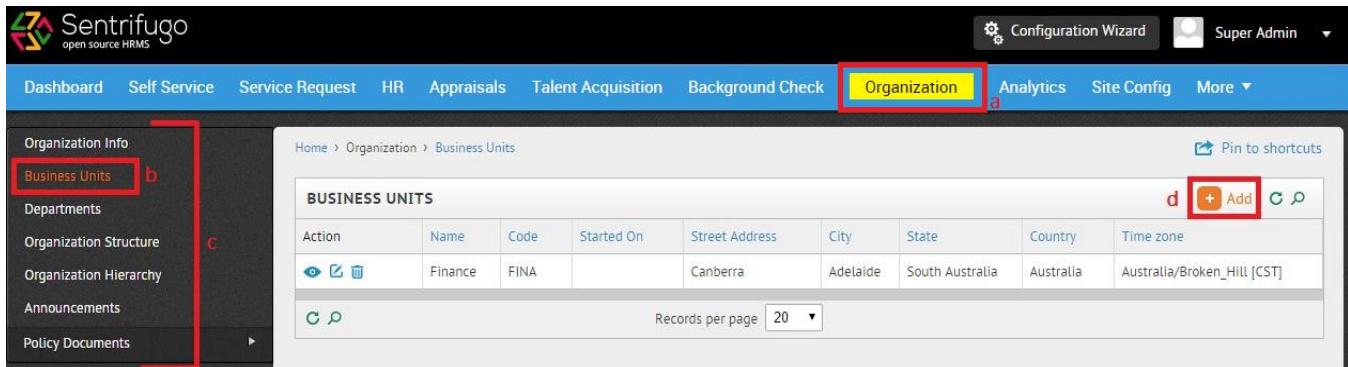



Figure 7.1

Add Business Units

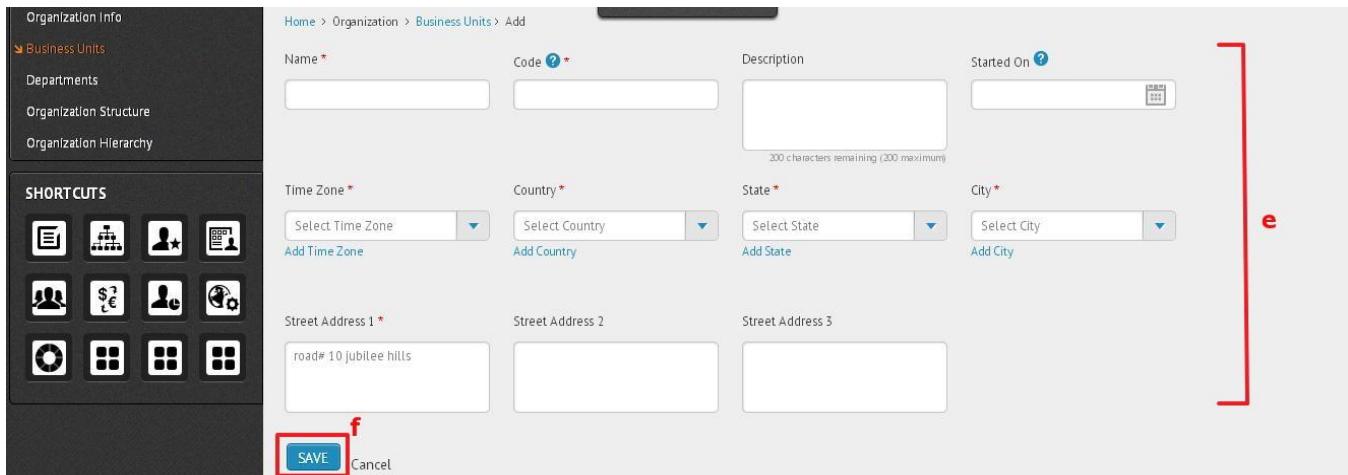
- a. Click on Organization in the top menu
- b. The left side panel will display the submenus
- c. Click on Business Units
- d. Click on Add button on the right side panel



The screenshot shows the Sentrifugo web application. At the top, there is a navigation bar with links: Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization (highlighted with a yellow box), Analytics, Site Config, and More. On the far right, there are 'Configuration Wizard' and 'Super Admin' buttons. Below the navigation bar is a sidebar with sections: Organization Info (Business Units highlighted with a red box), Departments, Organization Structure, Organization Hierarchy, Announcements, and Policy Documents. The main content area shows a grid titled 'BUSINESS UNITS' with columns: Action, Name, Code, Started On, Street Address, City, State, Country, and Time zone. A single row is visible: Finance (Name), FINA (Code), Canberra (Street Address), Adelaide (City), South Australia (State), Australia (Country), and Australia/Broken_Hill [CST] (Time zone). At the bottom of the grid, there are search and records per page controls.

Figure 8

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

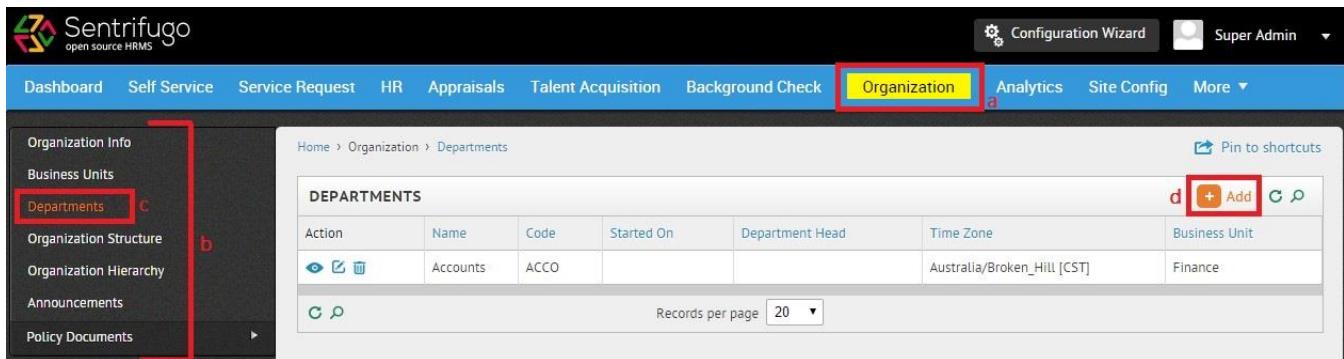


The screenshot shows the 'Add Business Units' form. The left sidebar has 'Business Units' selected. The main form contains fields for Name*, Code, Description, Started On, Time Zone, Country, State, City, Street Address 1*, Street Address 2, and Street Address 3. Below the form is a set of icons under 'SHORTCUTS'. At the bottom left is a 'SAVE' button (highlighted with a red box) and a 'Cancel' link. A red bracket labeled 'e' spans from the 'Name' field across the three street address fields. A red box labeled 'f' highlights the 'SAVE' button.

Figure 8.1

Add Departments

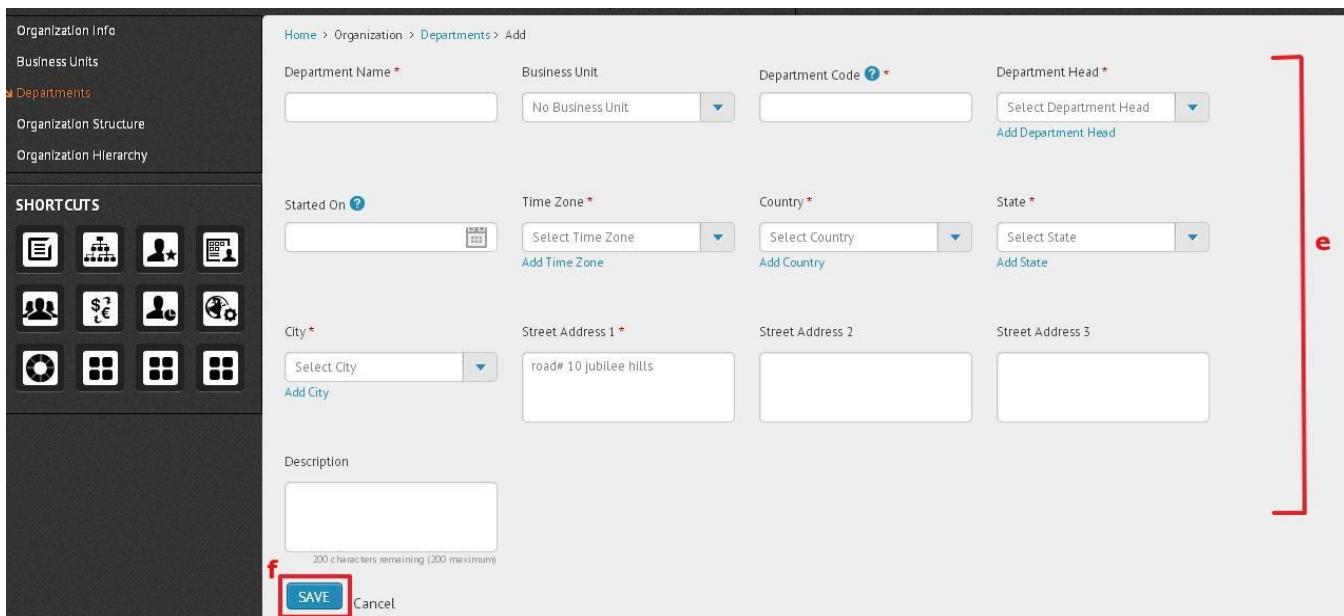
- a. Click on Organization in the top menu
- b. The left side panel will display the submenus
- c. Click on Departments
- d. Click on Add button on the right side panel



The screenshot shows the Sentrifugo web application interface. At the top, there is a navigation bar with links: Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization (highlighted with a yellow box), Analytics, Site Config, and More. Below the navigation bar is a left sidebar with several sections: Organization Info, Business Units (with 'Departments' highlighted with a red box and labeled 'a'), Organization Structure, Organization Hierarchy, Announcements, and Policy Documents. To the right of the sidebar is the main content area titled 'DEPARTMENTS'. It contains a table with columns: Action, Name, Code, Started On, Department Head, Time Zone, and Business Unit. There is one row visible: Accounts (Name: ACCO, Code: ACCO, Started On: blank, Department Head: Australia/Broken_Hill [CST], Time Zone: Finance). Below the table is a search bar and a 'Records per page' dropdown set to 20. A toolbar at the bottom of the content area includes icons for pinning to shortcuts, adding a new record (highlighted with a red box and labeled 'd'), and other actions.

Figure 9

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



The screenshot shows the 'Add Department' form. The left sidebar has the same structure as Figure 9. The main form has fields for Department Name, Business Unit, Department Code, Department Head, Started On, Time Zone, Country, State, City, Street Address 1, Street Address 2, Street Address 3, and a Description text area. The 'Save' button at the bottom left is highlighted with a red box and labeled 'f'. A red bracket labeled 'e' points from the 'Department Head' field to the 'Save' button.

Figure 9.1

Set Site Preferences

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

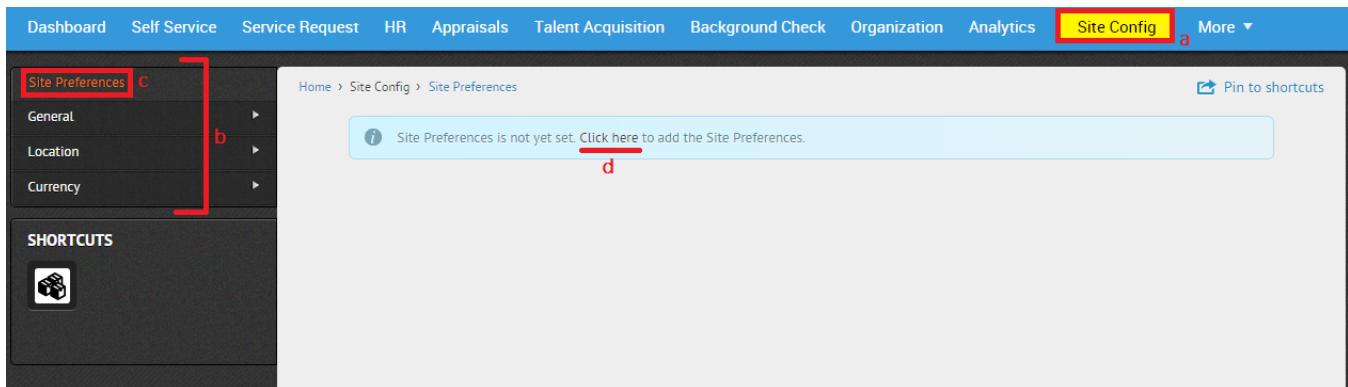


Figure 10

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

Figure 10.1

Activate and In-active Modules

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

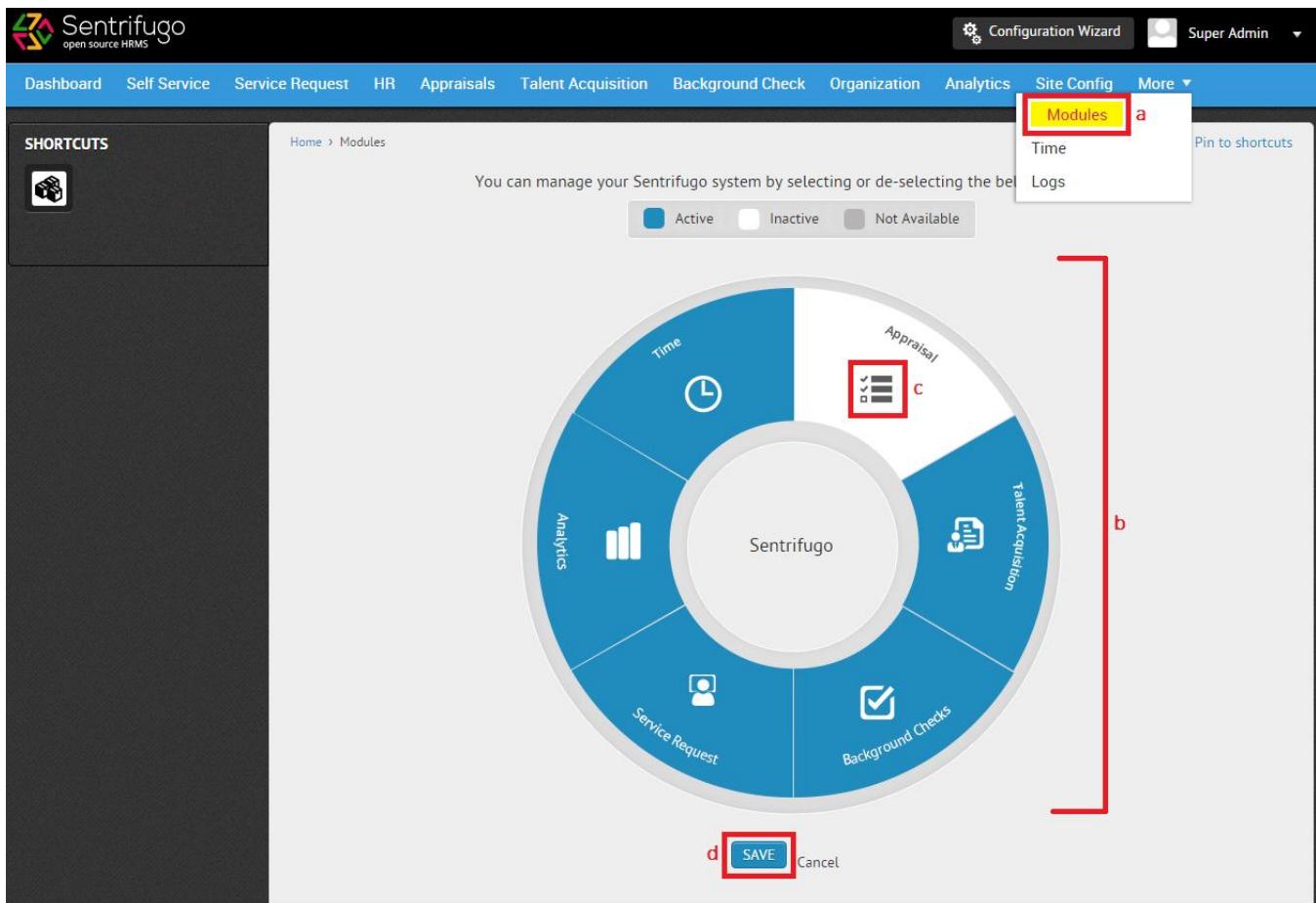
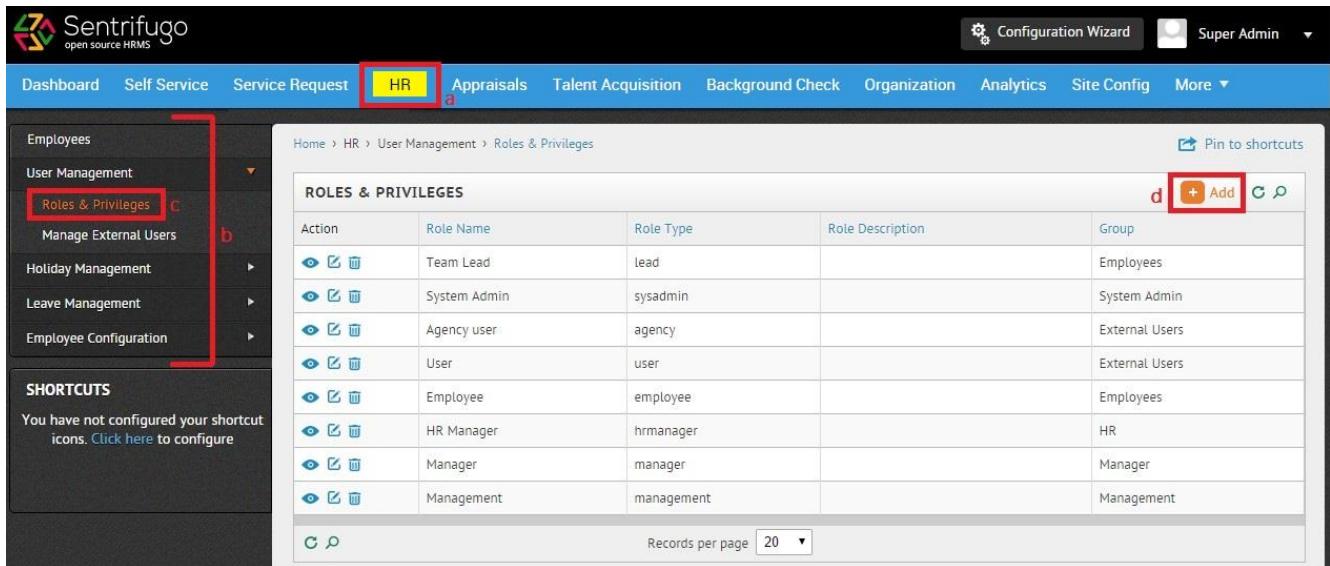


Figure 11

Add Roles & Privileges

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

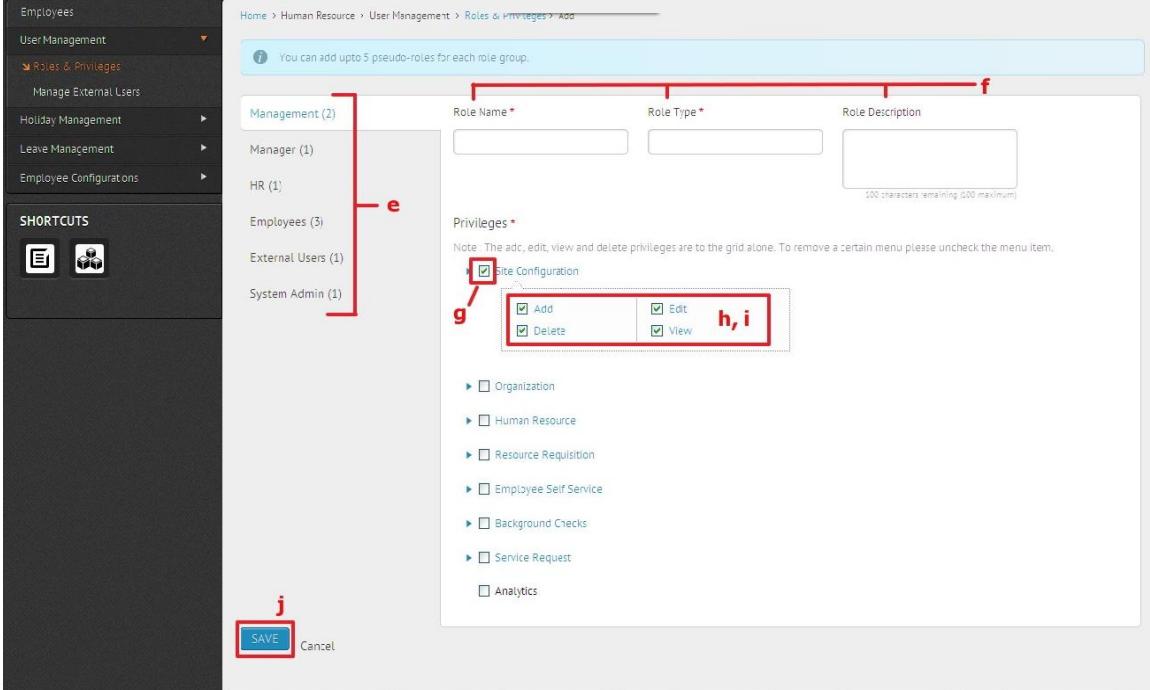


Action	Role Name	Role Type	Role Description	Group
	Team Lead	lead		Employees
	System Admin	sysadmin		System Admin
	Agency user	agency		External Users
	User	user		External Users
	Employee	employee		Employees
	HR Manager	hrmanager		HR
	Manager	manager		Manager
	Management	management		Management

Figure 12

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

Refer Figure 12.1



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

	Role Name *	Role Type *	Role Description
Management (2)	<input type="text"/>	<input type="text"/>	100 characters remaining (1000 maximum)
Manager (1)	<input type="text"/>	<input type="text"/>	
HR (1)	<input type="text"/>	<input type="text"/>	
Employees (5)	<input type="text"/>	<input type="text"/>	
External Users (1)	<input type="text"/>	<input type="text"/>	
System Admin (1)	<input type="text"/>	<input type="text"/>	

Privileges *

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

Site Configuration

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

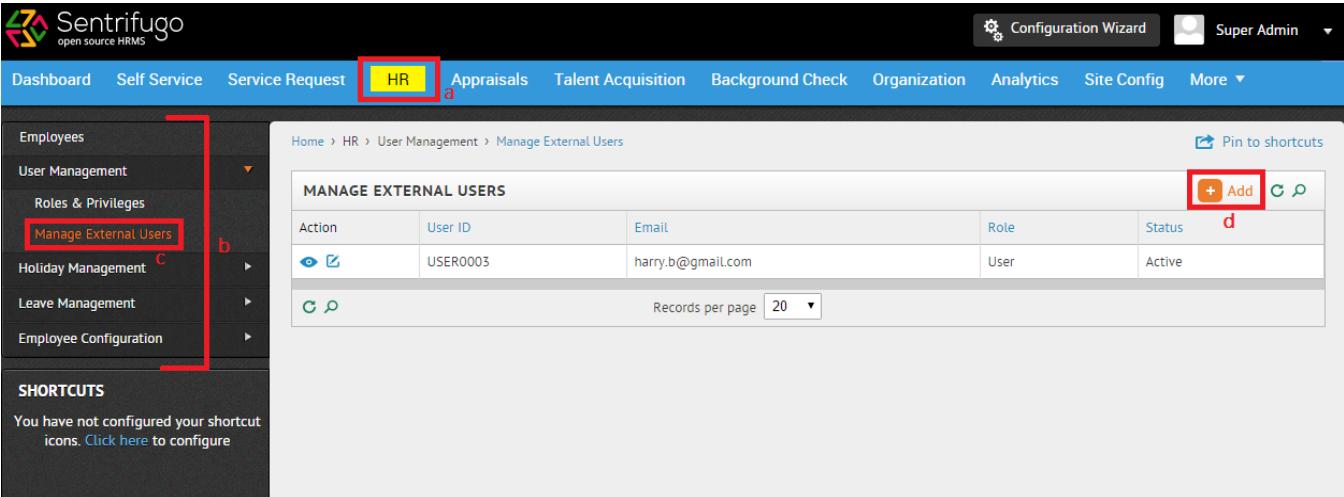
Organization
 Human Resource
 Resource Requisition
 Employee Self Service
 Background Checks
 Service Request
 Analytics

SAVE Cancel

Figure 12.1

Add an External User

- a. Click on HR in the top menu
- b. The left side panel will display the submenus
- c. Click on Manage External Users under User Management
- d. Click on Add button in the right side panel



Home > HR > User Management > Manage External Users

MANAGE EXTERNAL USERS

Action	User ID	Email	Role	Status
	USER0003	harry.b@gmail.com	User	Active

Records per page: 20

Pin to shortcuts

Figure 12.2

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



Figure 12.3

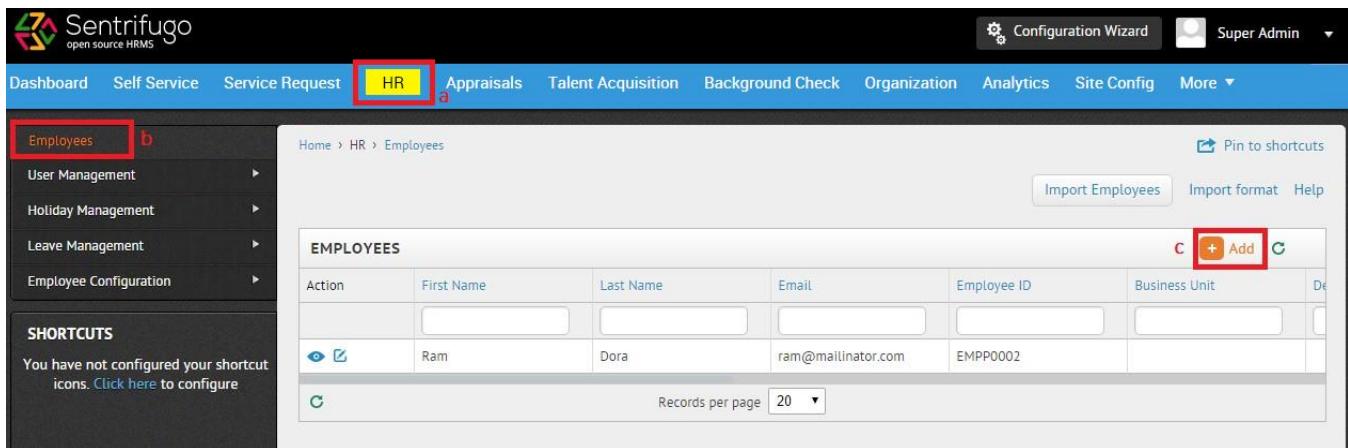
Add an Employee

Gathering Management Details is an important aspect of an organization. Using Sentrifugo, obtaining the management details is simple. Upon usage of the application for the first time, the management details are acquired right before adding employees to the organization. (This is already done in the 'Add Employee' option in the configuration wizard)

Note: Only after the management details are gathered and the first employee (Head of Organization, Employee #2) is added, the privilege to add employees to the application will be enabled.

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

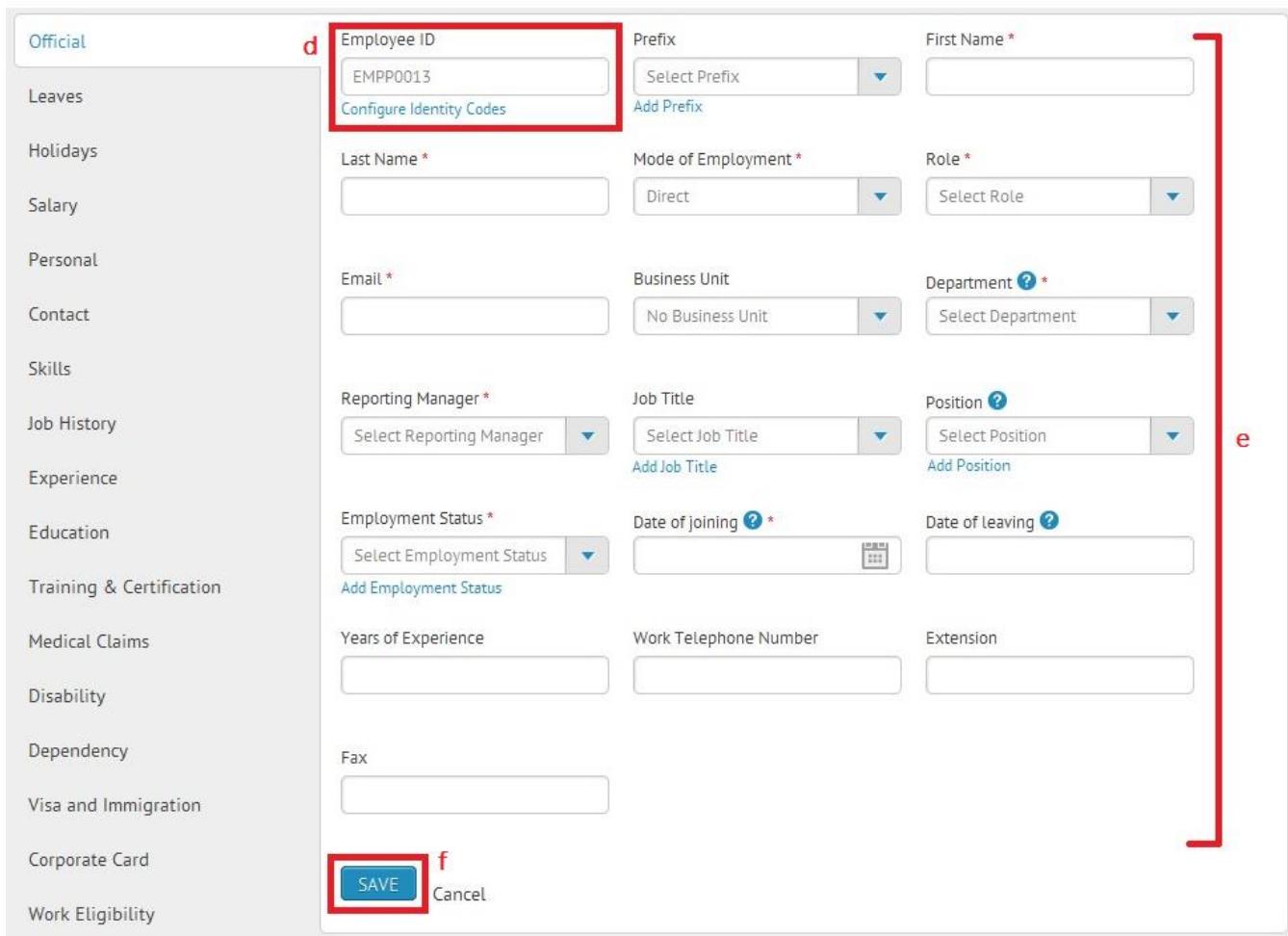
Refer Figure 13



The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. The HR tab is highlighted with a yellow box. The left sidebar has a 'User Management' section with 'Employees' selected, indicated by a red box. The main content area displays a table titled 'EMPLOYEES' with columns for Action, First Name, Last Name, Email, Employee ID, Business Unit, and Delete. A row for an employee named Ram is shown. At the bottom of the table, there is a 'Records per page' dropdown set to 20. In the top right corner of the table, there is a red box around the 'Add' button.

Figure 13

- d. The Employee ID will be auto generated by the application
- e. Enter the details respective to the employee
- f. Click on Save to add the employee



The screenshot shows the 'Employee Detail' form. On the left, a sidebar lists various sections: Official, Leaves, Holidays, Salary, Personal, Contact, Skills, Job History, Experience, Education, Training & Certification, Medical Claims, Disability, Dependency, Visa and Immigration, Corporate Card, and Work Eligibility. The main form area contains fields for Employee ID (highlighted with a red box 'd'), Prefix, First Name, Last Name, Mode of Employment, Role, Email, Business Unit, Department, Reporting Manager, Job Title, Position, Employment Status, Date of joining, Date of leaving, Years of Experience, Work Telephone Number, Extension, Fax, and a 'Years of Experience' dropdown. A red bracket 'e' spans from the 'Business Unit' field across the rest of the form. At the bottom, there are 'SAVE' and 'Cancel' buttons, with 'SAVE' highlighted with a red box 'f'.

Figure 13.1

Update My Details

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

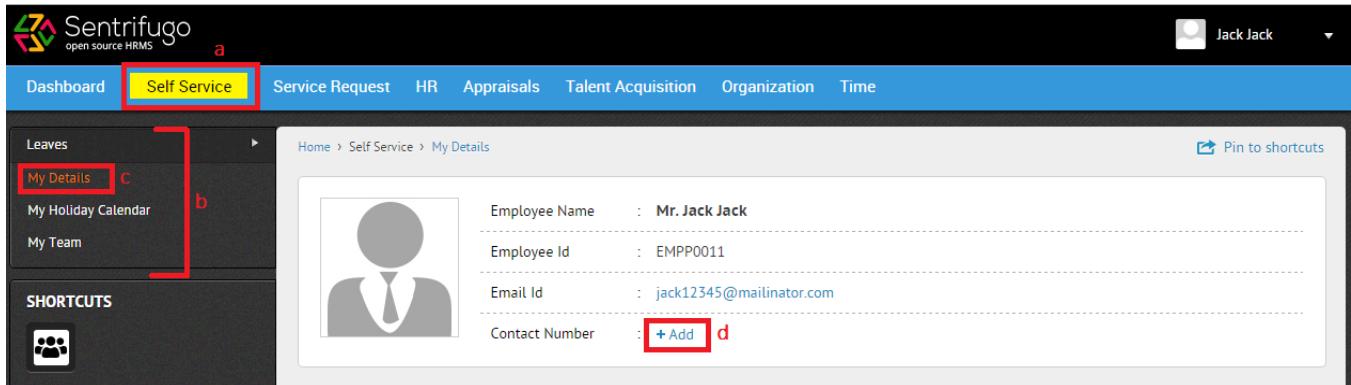


Figure 14

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

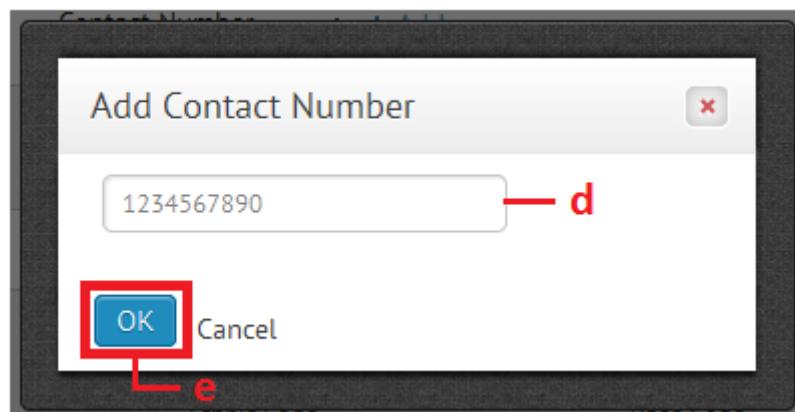
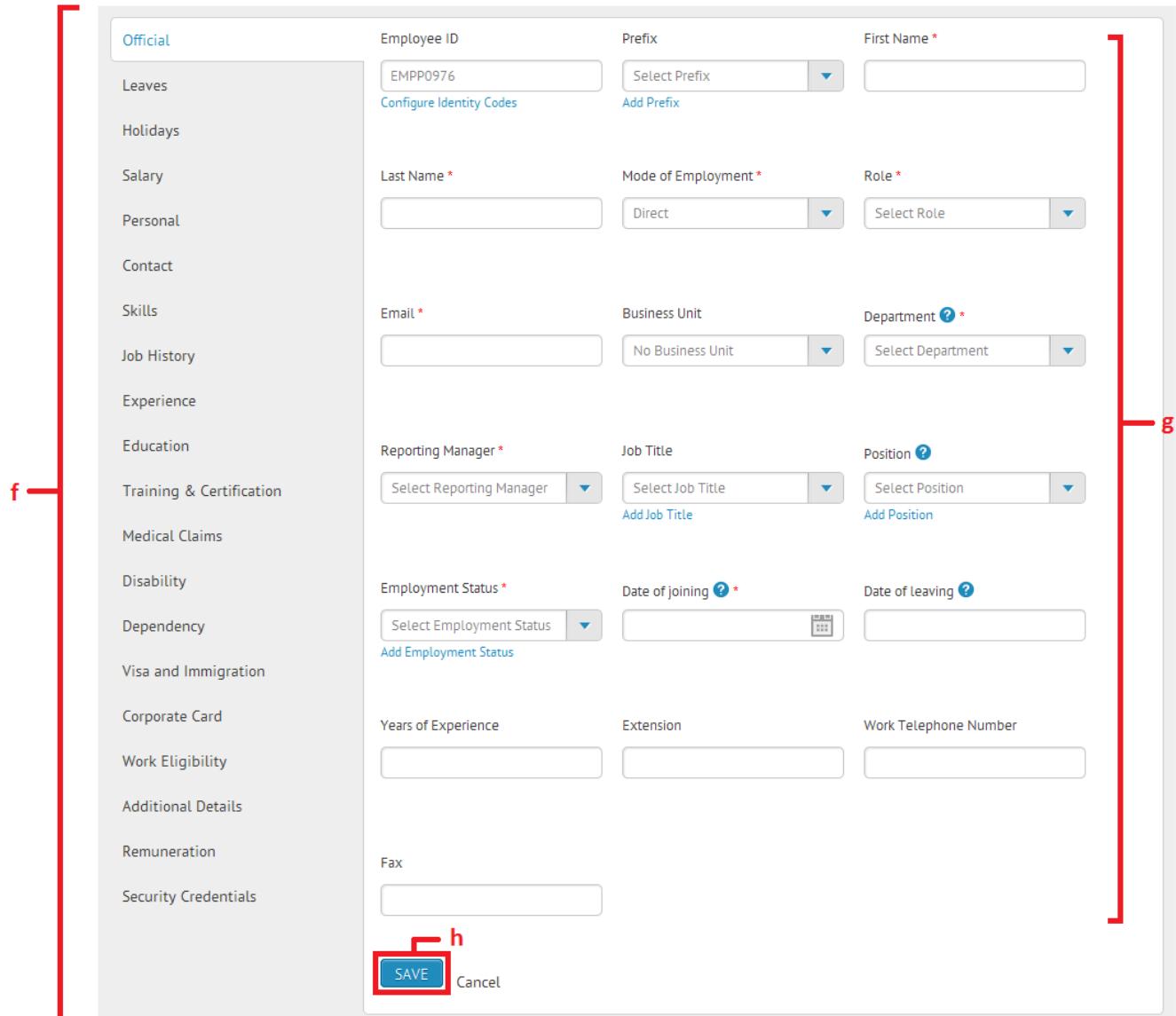


Figure 14.1

Click on the desired tab in the right side panel to add or edit details

- f. Click on Edit in the respective screen to add or edit the details
- g. Click on Save to add or update the details



Official

Employee ID	Prefix	First Name *
EMPP0976	Select Prefix	
Configure Identity Codes		
Last Name *	Mode of Employment *	Role *
	Direct	Select Role
Email *	Business Unit	Department ? *
	No Business Unit	Select Department
Reporting Manager *	Job Title	Position ?
Select Reporting Manager	Select Job Title	Select Position
Add Job Title		
Employment Status *	Date of joining ? *	Date of leaving ?
Select Employment Status		
Add Employment Status		
Years of Experience	Extension	Work Telephone Number
Fax		
<input style="background-color: #0070C0; color: white; font-weight: bold; padding: 5px; margin-right: 10px;" type="button" value="SAVE"/> <input style="font-weight: bold; padding: 5px;" type="button" value="Cancel"/>		

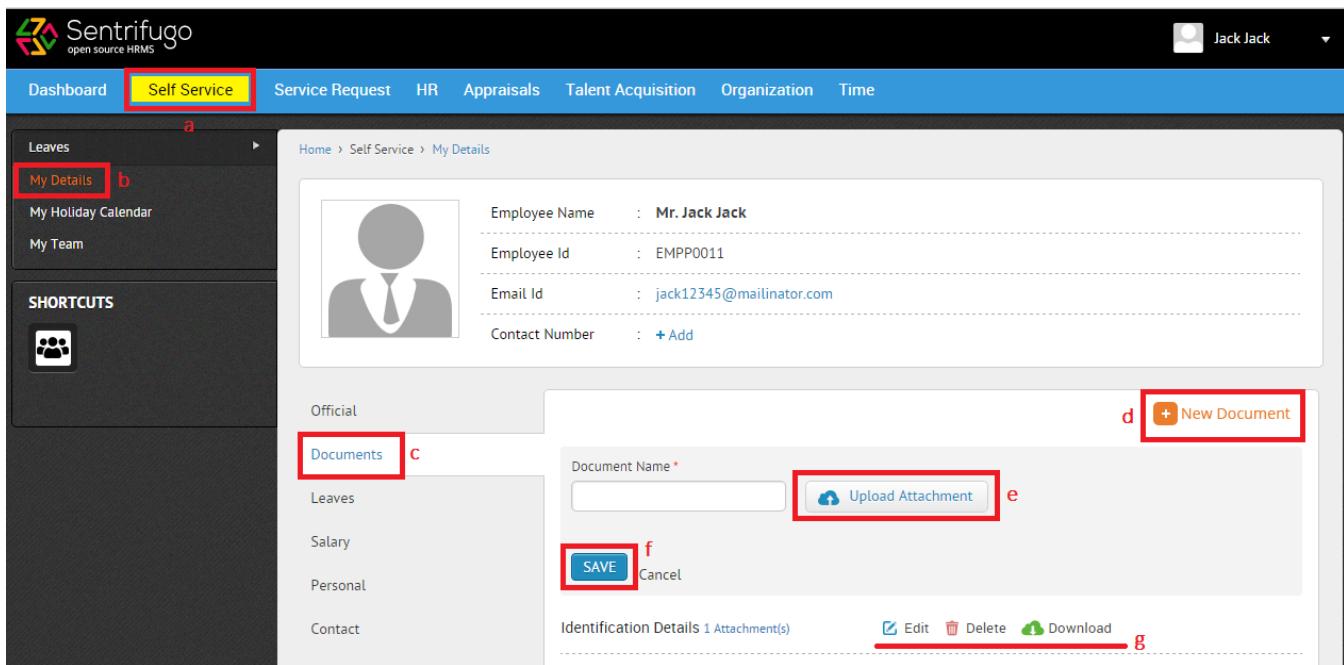
Figure 14.2

Add Employee Documents

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

For employees to add documents:

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



The screenshot shows the Sentrifugo self-service interface. At the top, there's a navigation bar with links: Dashboard, Self Service (highlighted with a red box), Service Request, HR, Appraisals, Talent Acquisition, Organization, and Time. On the far right, there's a user profile for 'Jack Jack'. Below the navigation bar is a sidebar with sections: Leaves, My Details (highlighted with a red box), My Holiday Calendar, and My Team. Under 'SHORTCUTS', there's a group icon. The main content area shows 'Home > Self Service > My Details'. It displays basic employee information: Employee Name (Mr. Jack Jack), Employee Id (EMPP0011), Email Id (jack12345@mailinator.com), and Contact Number (+ Add). Below this is an 'Official' section with a 'Documents' link (highlighted with a red box) and a 'New Document' button (highlighted with a red box). A modal window is open for adding a new document, with fields for 'Document Name*' (empty), 'Upload Attachment' (button highlighted with a red box), 'SAVE' (button highlighted with a red box), and 'Cancel'. At the bottom of the modal, it says 'Identification Details 1 Attachment(s)' with options to 'Edit', 'Delete', and 'Download'.

Figure 15

Add Leave Management Options

- Click on HR in the top menu
- The left side panel will display the submenus
- Click on Leave Management Options
- Click on Add button in the right side panel

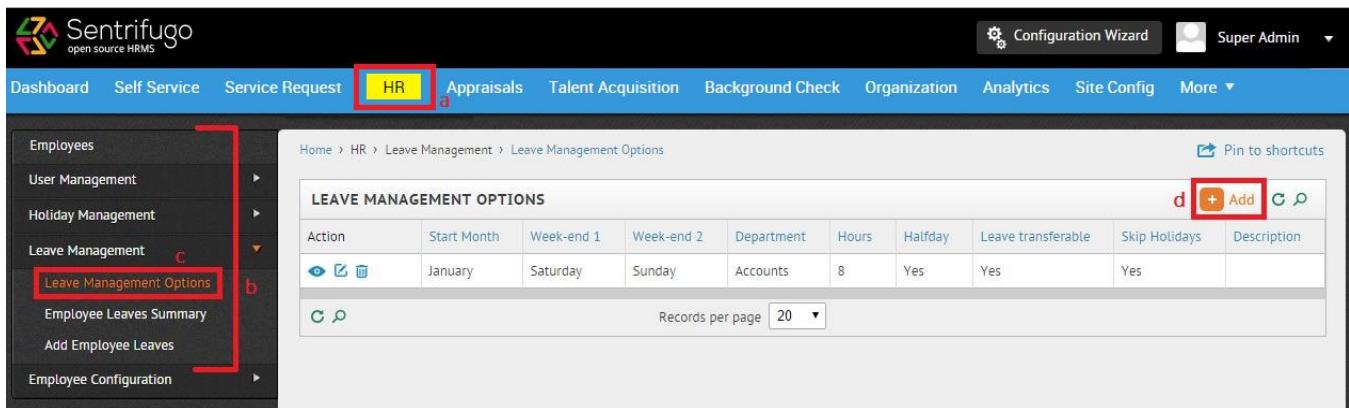
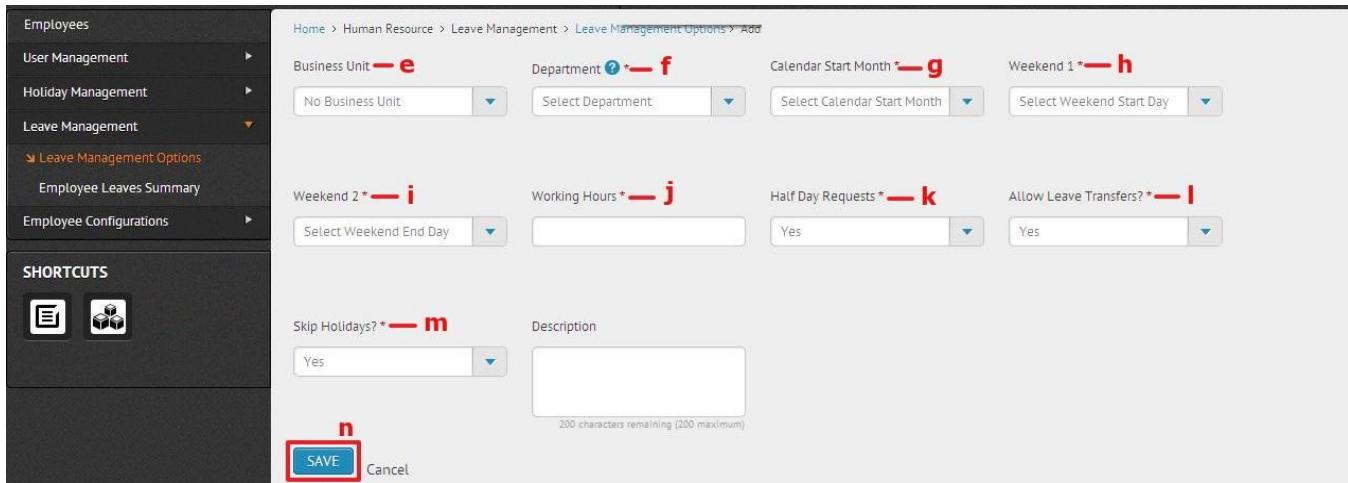


Figure 16

- Select a business unit from Business Unit dropdown
- Select a department from department dropdown
- Select month from Calendar Start Month dropdown
- Select weekend1 from Weekend1 dropdown
- Select weekend2 from Weekend2 dropdown
- Enter number of working hours
- Provide permissions for Half Day Requests
- Provide permissions to Allow Leave Transfers
- Provide permissions to Skip Holidays
- Click Save button to add leave management options for department

Refer figure 16.1



The screenshot shows the 'Leave Management Options' configuration page. The left sidebar has 'Leave Management' expanded, with 'Leave Management Options' selected. The main form contains the following fields:

- Business Unit (e): No Business Unit
- Department (f): Select Department
- Calendar Start Month (g): Select Calendar Start Month
- Weekend 1 (h): Select Weekend Start Day
- Weekend 2 (i): Select Weekend End Day
- Working Hours (j): [empty input]
- Half Day Requests (k): Yes
- Allow Leave Transfers? (l): Yes
- Skip Holidays? (m): Yes
- Description: [empty input] (200 characters remaining)
- Buttons: SAVE (highlighted with a red box) and Cancel

Figure 16.1

Apply for a Leave Request

- Click on Employee Self-Service in the top menu
- The left side panel will display the submenus
- Click on Leave Request
- The current month calendar will be displayed on the right side panel
- Click on previous and after arrow buttons to move to previous or next month
- Click on the day you want to apply for leave to apply leave for one day
- View your leaves for a particular month. For users (Manager/HR/Management) who have employees reporting to them, they can view their leave details also.
- Apply for leave directly by clicking here. The date is set by default to the current date but it can be changed.

Refer Figure 17

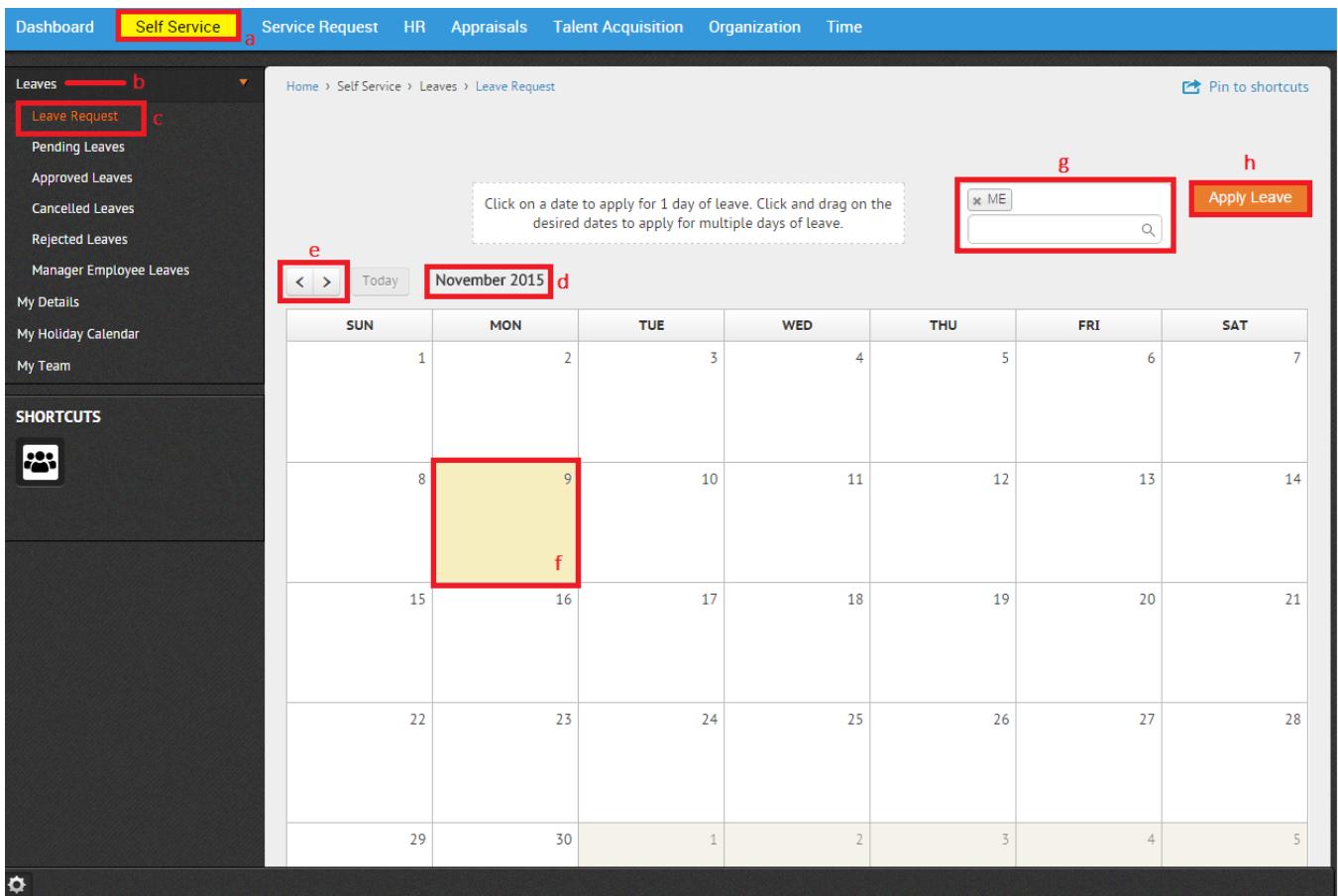


Figure 17

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

Refer Figure 17.1

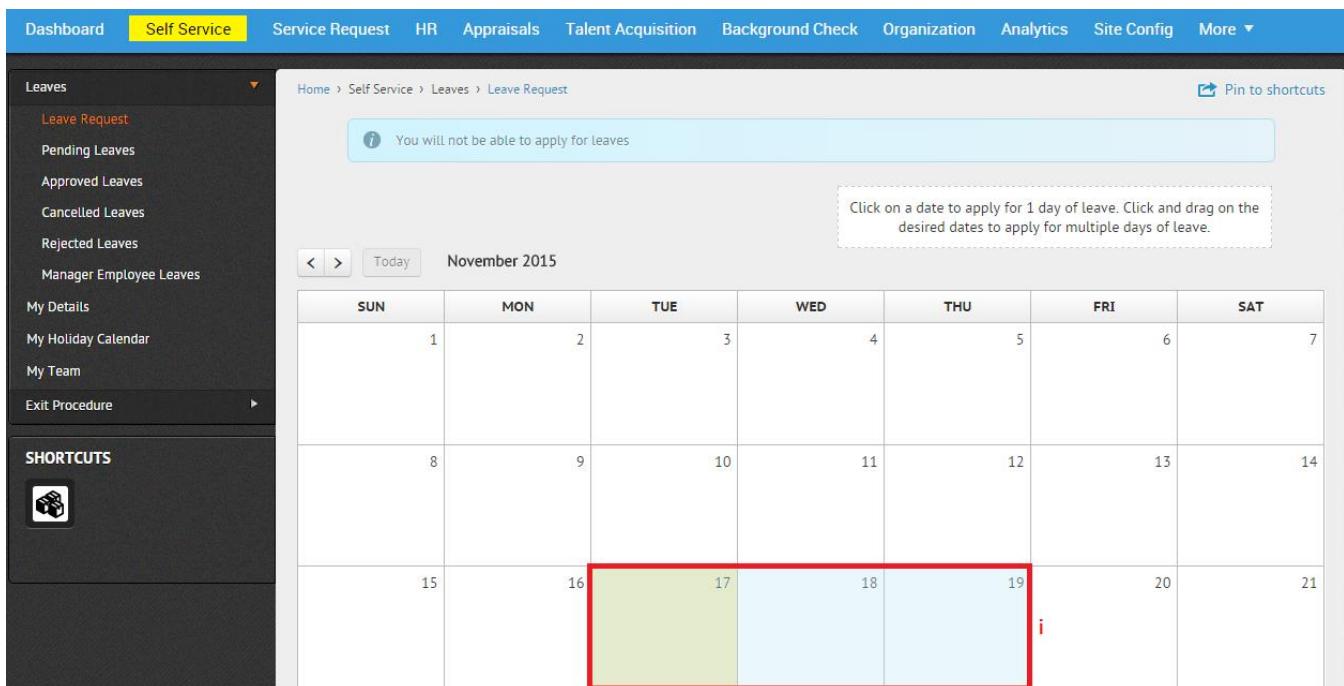


Figure 17.1

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

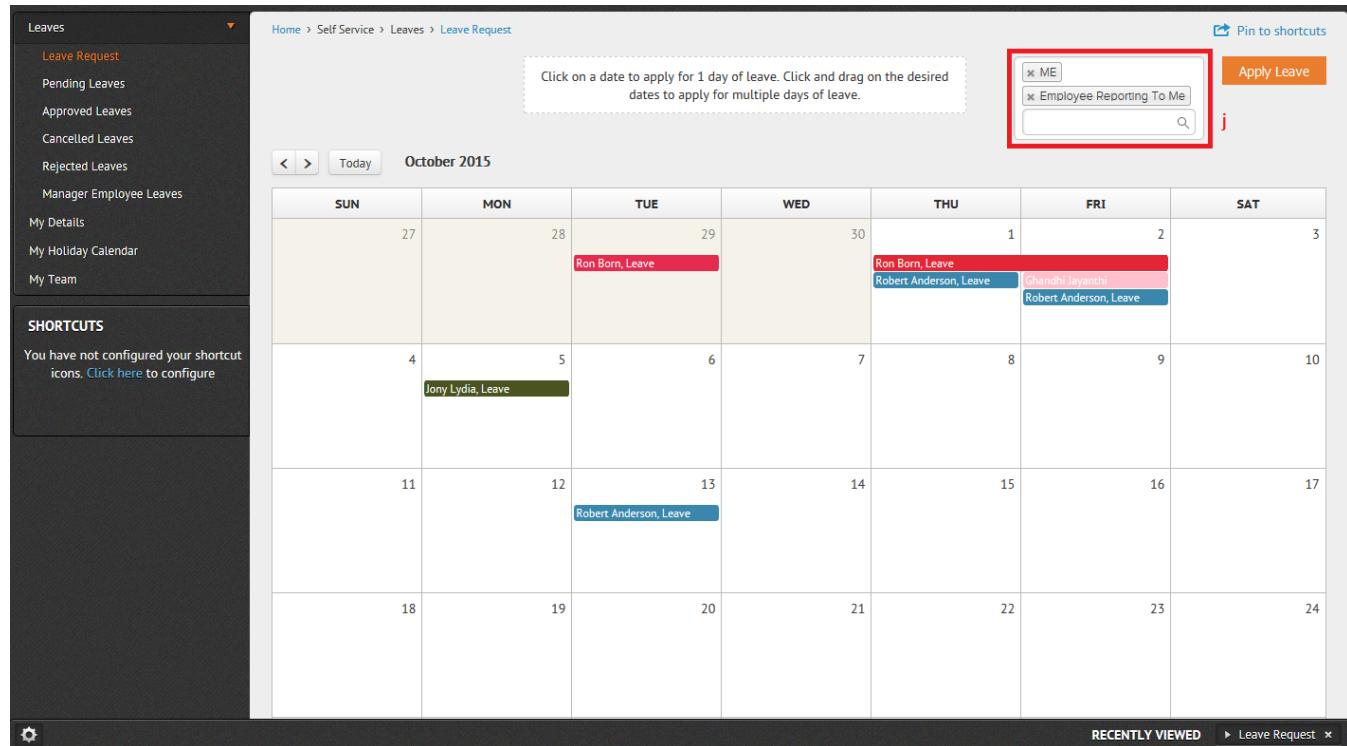
Create: Leave Request

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

Figure 17.2

A **manager** will be able to view all the employees' leaves (only those who report to him/her) when he/she selects the option 'Employee reporting to me'.

j. Click on the option 'Employee Reporting To Me' to view all employees leaves

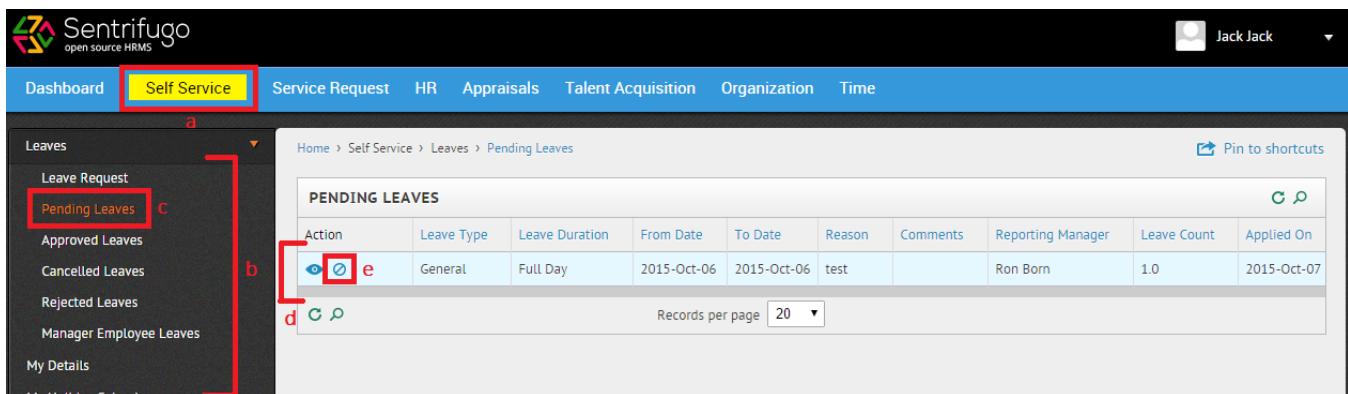


The screenshot shows the Sentrifugo Leave Request interface. On the left, there's a sidebar with navigation links like 'Leave Request', 'Pending Leaves', 'Approved Leaves', etc. Below that is a 'SHORTCUTS' section with a message about未配置 shortcut icons. The main area is a calendar for October 2015. Several days have colored boxes indicating leave requests: October 29 (red), October 30 (light blue), October 31 (light blue), October 4 (dark green), October 5 (dark green), October 12 (dark blue), and October 13 (dark blue). At the top right of the calendar area, there's a search bar with two dropdowns: 'ME' and 'Employee Reporting To Me', followed by a magnifying glass icon and an 'Apply Leave' button. A red box surrounds this search area, and a red letter 'j' is placed to its right. The bottom right corner of the calendar has a 'RECENTLY VIEWED' section with a 'Leave Request' link.

Figure 17.3

Cancel my Leave Request

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



Action	Leave Type	Leave Duration	From Date	To Date	Reason	Comments	Reporting Manager	Leave Count	Applied On
e	General	Full Day	2015-Oct-06	2015-Oct-06	test		Ron Born	1.0	2015-Oct-07

Figure 17.4

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

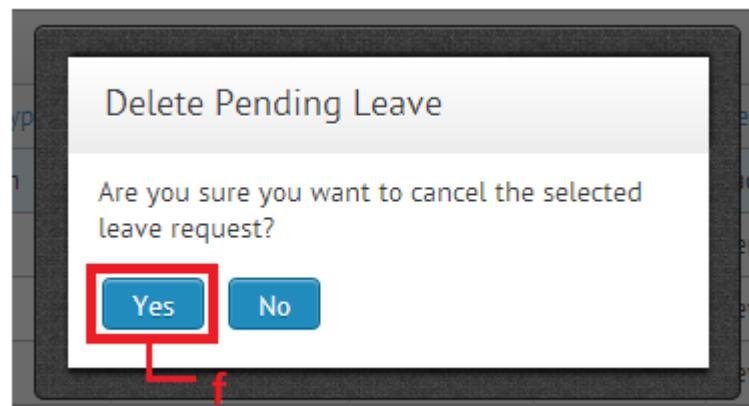
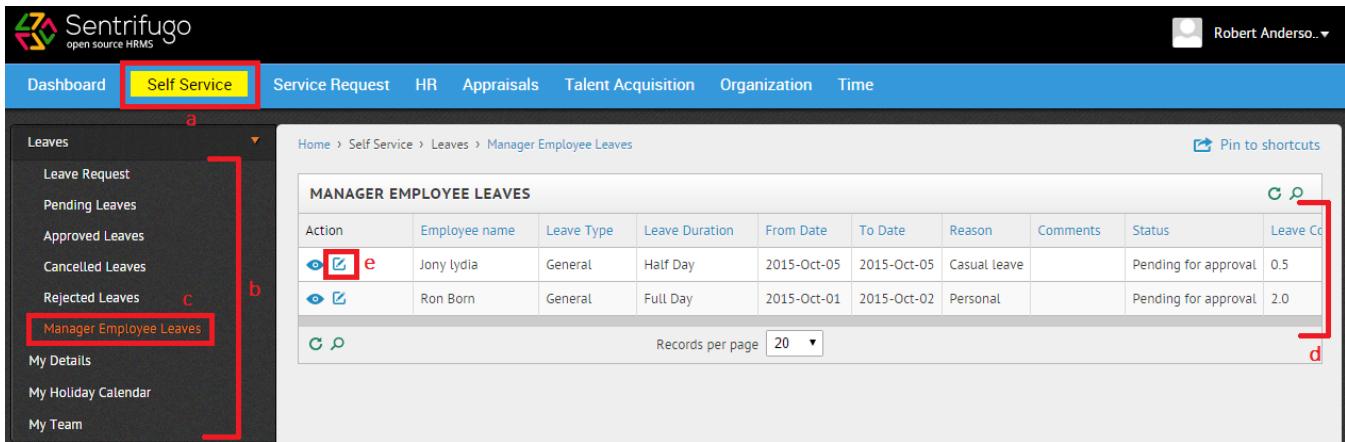


Figure 17.5

Approve or Reject Leave Requests

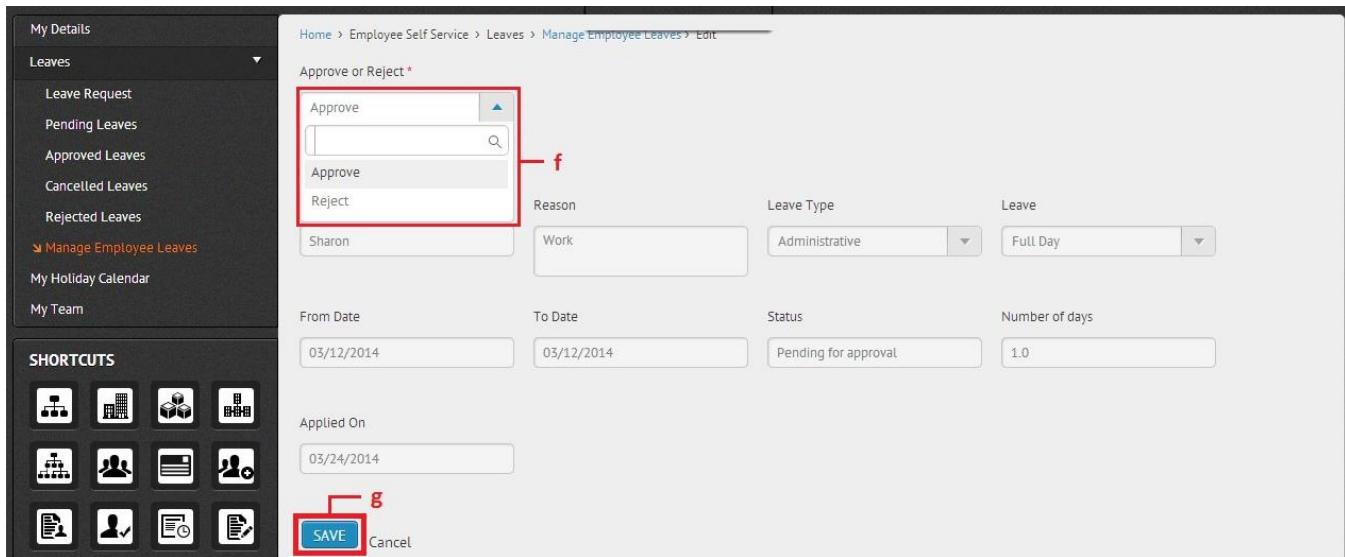
- a. Click on Self-Service in the top menu
- b. The left side panel will display the submenus
- c. Click on Manage Employee Leaves
- d. The leaves applied by the employees working under the logged in user will be displayed in the right side panel
- e. Click on Edit icon of a leave request



The screenshot shows the Sentrifugo Self Service interface. The top navigation bar includes links for Dashboard, Self Service (highlighted with a yellow box), Service Request, HR, Appraisals, Talent Acquisition, Organization, and Time. The user profile of Robert Anderson is visible on the top right. The left sidebar has a 'Leaves' category with sub-options: Leave Request, Pending Leaves, Approved Leaves, Cancelled Leaves, Rejected Leaves (highlighted with a red box), and Manager Employee Leaves (highlighted with a red box). A red bracket labeled 'b' groups the 'Leaves' category and its sub-options. A red bracket labeled 'c' groups the 'Rejected Leaves' and 'Manager Employee Leaves' options. The main content area displays a table titled 'MANAGER EMPLOYEE LEAVES' with two rows of data. The first row for 'Jony Lydia' has an edit icon (highlighted with a red box) and a red letter 'e'. The second row for 'Ron Born' also has an edit icon and a red letter 'e'. The table columns are: Action, Employee name, Leave Type, Leave Duration, From Date, To Date, Reason, Comments, Status, and Leave C. A red bracket labeled 'd' groups the table and its header. A red bracket labeled 'e' groups the edit icons in the table.

Figure 17.6

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

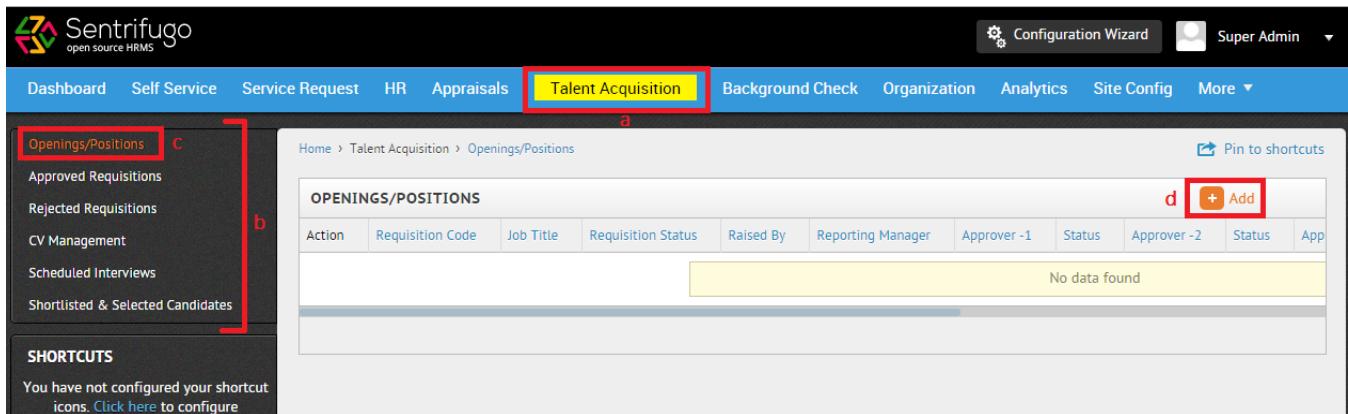


The screenshot shows the Sentrifugo Employee Self Service interface. The left sidebar has a 'Leaves' category with sub-options: Leave Request, Pending Leaves, Approved Leaves, Cancelled Leaves, Rejected Leaves, and Manager Employee Leaves (highlighted with a red box). A red bracket labeled 'f' groups the 'Rejected Leaves' and 'Manager Employee Leaves' options. Below the sidebar is a 'SHORTCUTS' section with various icons. The main content area shows a dialog titled 'Approve or Reject *'. It contains a dropdown menu for 'Approve' (highlighted with a red box) with options 'Approve' and 'Reject', and a red letter 'f' pointing to it. The 'Approve' option is selected. Other fields include 'Reason' (Sharon), 'Leave Type' (Administrative), 'Leave' (Full Day), 'From Date' (03/12/2014), 'To Date' (03/12/2014), 'Status' (Pending for approval), and 'Number of days' (1.0). Below these fields are 'Applied On' (03/24/2014) and 'SAVE' (highlighted with a red box) and 'Cancel' buttons. A red bracket labeled 'g' groups the 'SAVE' and 'Cancel' buttons.

Figure 17.7

Create an opening for a requisition

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

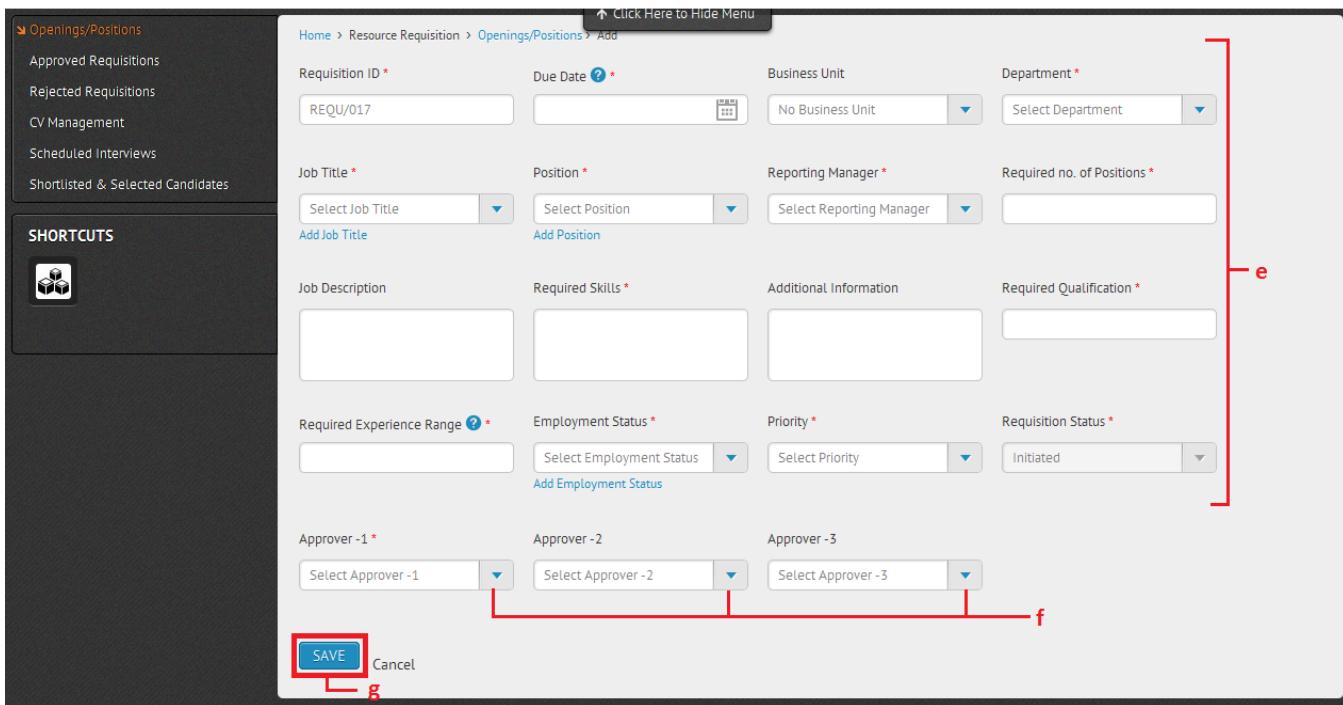


The screenshot shows the Sentrifugo Talent Acquisition interface. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition (which is highlighted with a yellow box), Background Check, Organization, Analytics, Site Config, and More. On the far right, there are Configuration Wizard and Super Admin options. Below the navigation bar is a left sidebar with several links: Openings/Positions (highlighted with a red box and bracket b), Approved Requisitions, Rejected Requisitions, CV Management, Scheduled Interviews, and Shortlisted & Selected Candidates. At the bottom of the sidebar, there's a section for SHORTCUTS with a message: "You have not configured your shortcut icons. [Click here to configure](#)". The main content area is titled "OPENINGS/POSITIONS" and contains a table with columns: Action, Requisition Code, Job Title, Requisition Status, Raised By, Reporting Manager, Approver -1, Status, Approver -2, Status, and App. A red bracket (c) points to the "Openings/Positions" link in the sidebar. A red box (d) highlights the "Add" button in the top right corner of the main grid. A red bracket (d) also highlights the "Talent Acquisition" link in the top navigation bar.

Figure 18

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

Refer Figure 18.1



Openings/Positions

Approved Requisitions
Rejected Requisitions
CV Management
Scheduled Interviews
Shortlisted & Selected Candidates

SHORTCUTS

Home > Resource Requisition > Openings/Positions > Add

Requisition ID * Due Date ? * Business Unit Department *

Job Title * Position * Reporting Manager * Required no. of Positions *

Job Description Required Skills * Additional Information Required Qualification *

Required Experience Range ? * Employment Status * Priority * Requisition Status *

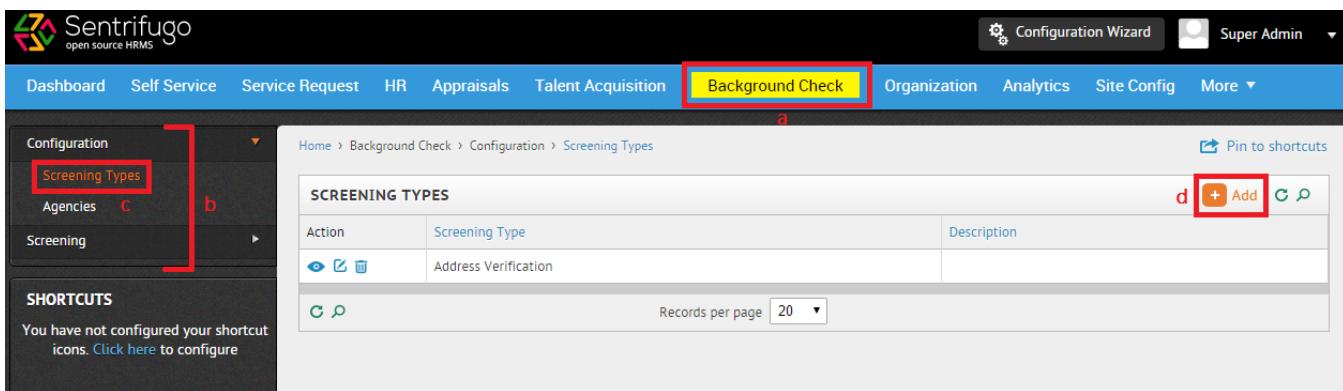
Select Approver -1 Select Approver -2 Select Approver -3

Buttons: SAVE Cancel

Figure 18.1

Add Screening Type for Background Checks

- Click on Background Check in the top menu
- The left side panel will display the submenus
- Click on Screening Types
- Click on Add button in the right side panel



Action	Screening Type	Description
	Address Verification	

Figure 18.2

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

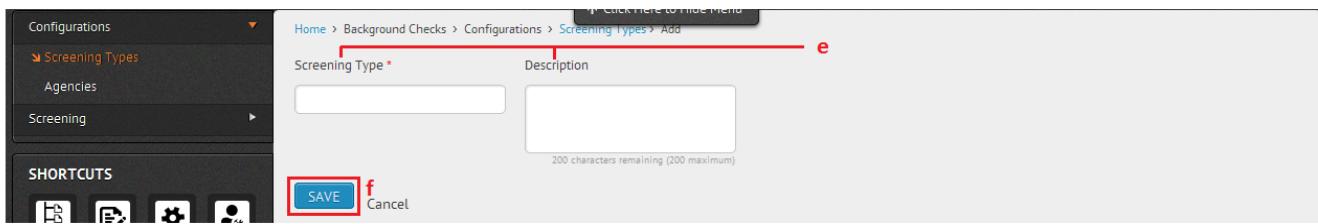


Figure 18.3

Add an Agency to Perform Background Checks

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

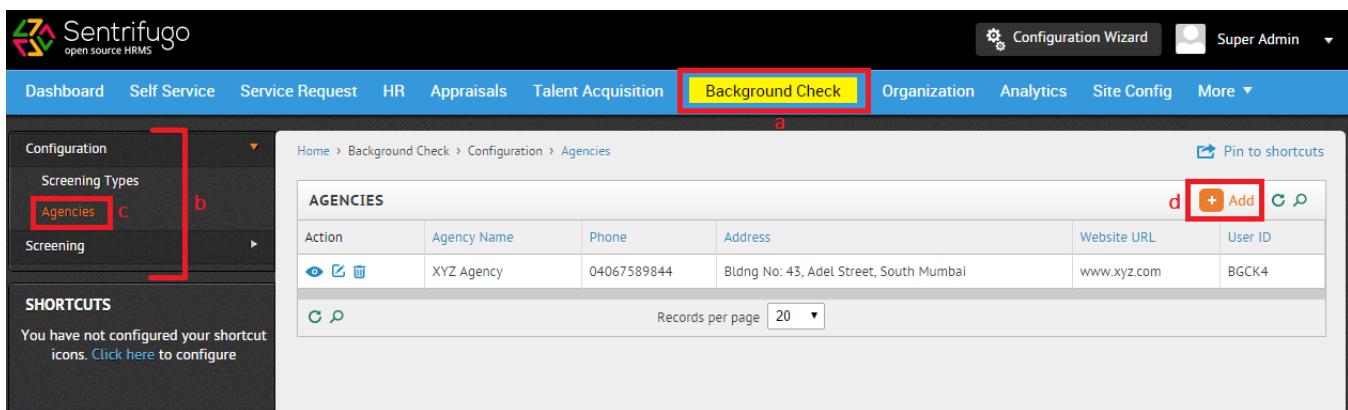
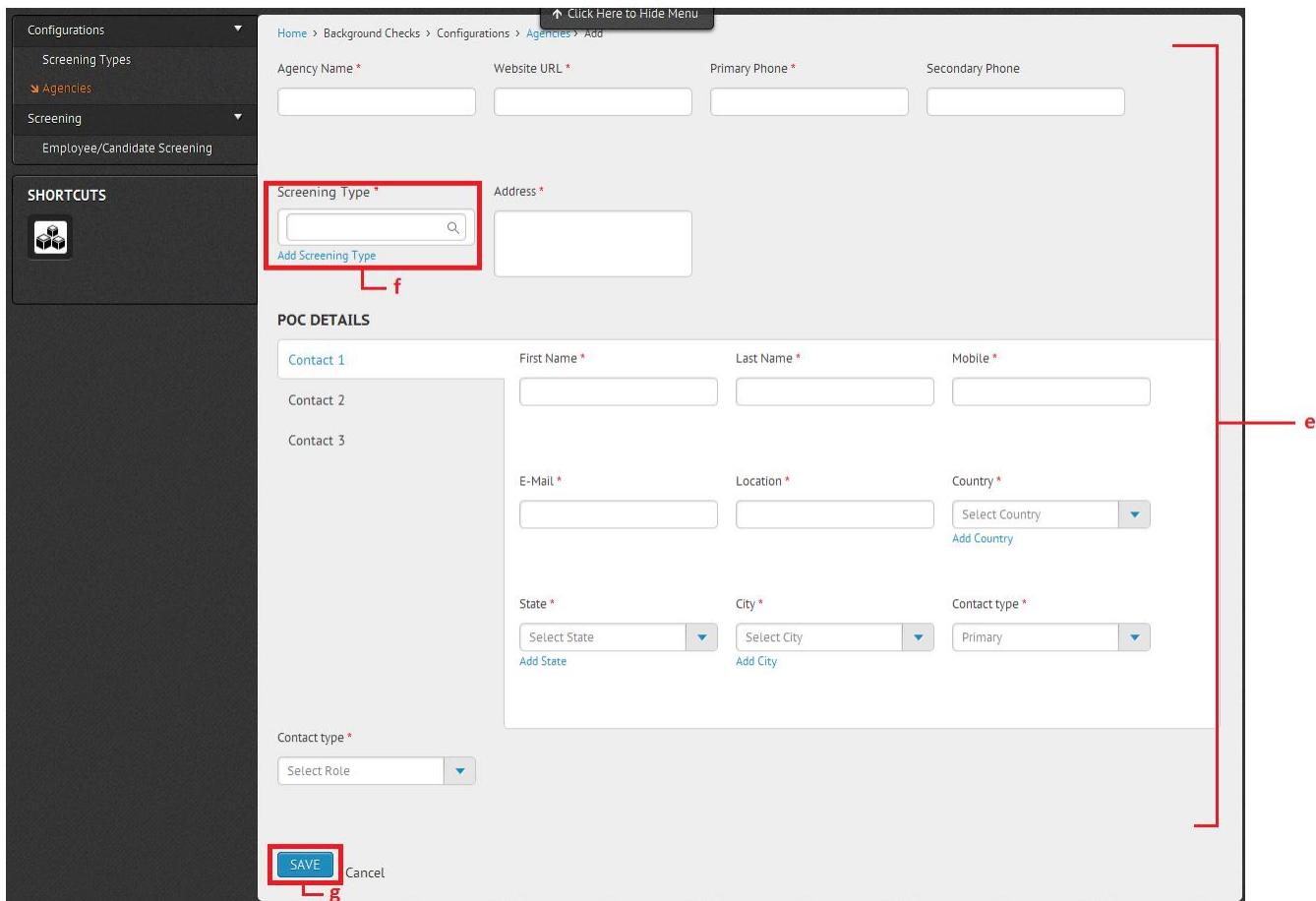


Figure 18.4

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

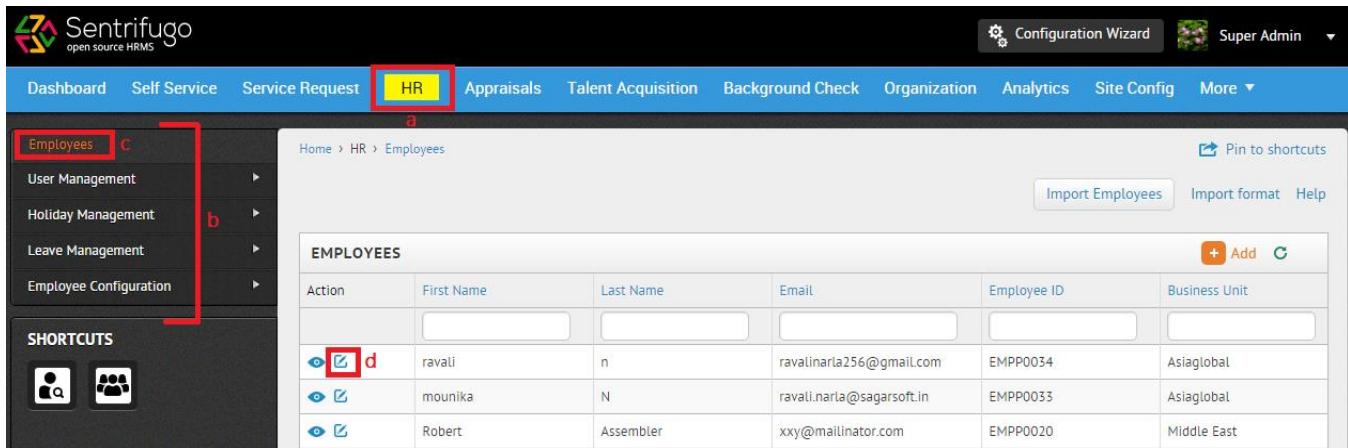


The screenshot shows the 'Agencies' configuration page in the Sentrifugo application. The left sidebar has 'Configurations' expanded, with 'Screening Types' and 'Agencies' selected. The main panel shows fields for 'Agency Name*', 'Website URL*', 'Primary Phone*', and 'Secondary Phone'. Below these are sections for 'POC DETAILS' and 'Address'. The 'POC DETAILS' section includes fields for 'Contact 1', 'First Name*', 'Last Name*', 'Mobile*', 'Contact 2', 'Contact 3', 'E-Mail*', 'Location*', 'Country*', 'State*', 'City*', and 'Contact type*'. At the bottom are 'Select Role' and 'Contact type*' dropdowns, and 'SAVE' and 'Cancel' buttons. Red annotations include a box around the 'Screening Type' dropdown, a line labeled 'e' pointing to the 'Mobile' field, a box labeled 'f' pointing to the 'Address' field, and a box labeled 'g' pointing to the 'SAVE' button.

Figure 18.5

Send a current employee for Background Check

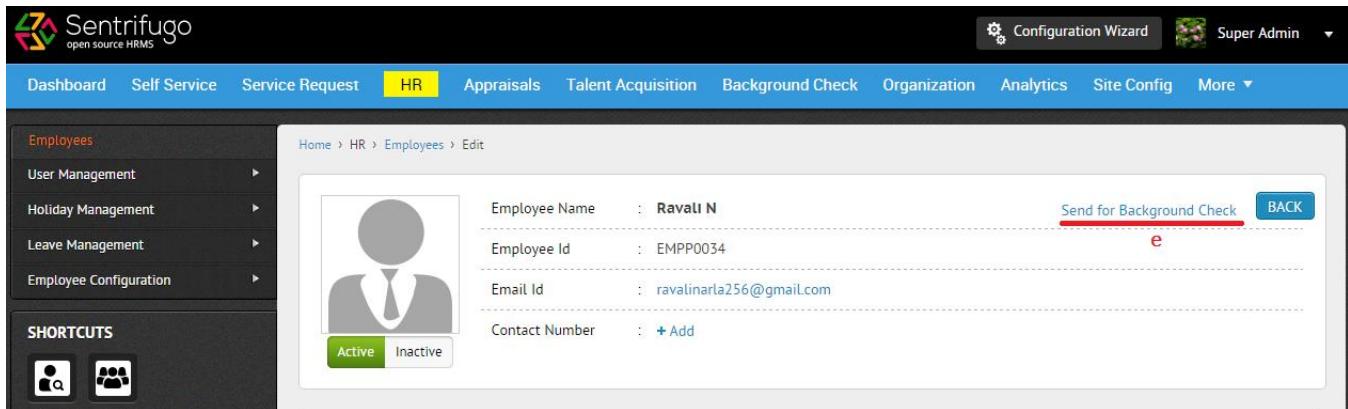
- a. Click on Human Resources in the top menu
- b. The left side panel will display the submenus
- c. Click on Employees
- d. Click on Edit icon corresponding to an employee in the right side panel



The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (highlighted with a yellow box), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, More, Configuration Wizard, and Super Admin. The left sidebar has sections for Employees (highlighted with a red box), User Management, Holiday Management, Leave Management, Employee Configuration (highlighted with a red box), and SHORTCUTS (with icons for user and group management). The main content area displays a table titled 'EMPLOYEES' with columns for Action, First Name, Last Name, Email, Employee ID, and Business Unit. It lists three employees: ravalin, mounika, and Robert. The 'ravalin' row is selected, indicated by a red box 'd' next to the edit icon. A red box 'e' highlights the 'Send for Background Check' button in the top right corner of the employee edit form.

Figure 18.6

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



The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (highlighted with a yellow box), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, More, Configuration Wizard, and Super Admin. The left sidebar has sections for Employees (highlighted with a red box), User Management, Holiday Management, Leave Management, Employee Configuration (highlighted with a red box), and SHORTCUTS (with icons for user and group management). The main content area displays an 'Edit' form for an employee named 'Ravalin N'. The form includes fields for Employee Name, Employee Id, Email Id, and Contact Number. A red box 'e' highlights the 'Send for Background Check' button in the top right corner of the form.

Figure 18.7

View & Generate Reports

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

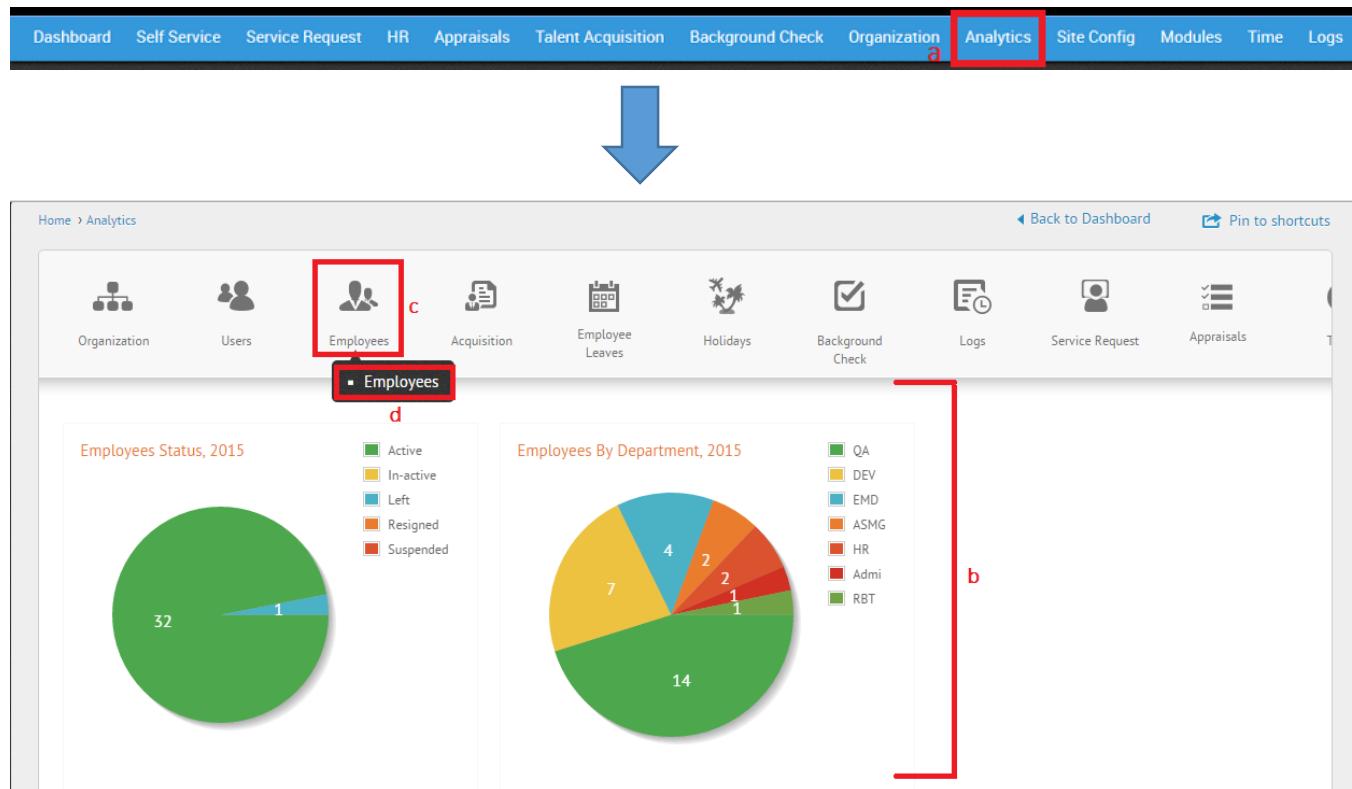


Figure 19

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

Refer Figure 19.1

Home > Analytics > Employees Report

◀ Back to Analytics ▶ Back to Dashboard

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

 Export to PDF  Export to Excel

EMPLOYEES								
Employee ID	Employee	Email	Mobile	Role	Reporting Manager	Job Title	Position	
EMPP-0008	Mr. Joseph	joseph@example.com	--	Software Engineer	Anderson neo	Software Engineer	Sr Employee	
EMPP-0020	Mr. Jacob	harith08@yahoo.com	--	Management	Paul	Manager	Manager	
EMPP-0011	Mr. Jim	manager.hrms@gmail.com	--	Manager	Paul	Manager	Manager	
EMPP-0010	Mr. James	management.hrms@gmail.com	--	Management	Paul	Managing Director	MD	
EMPP-0012	Miss. Sheela	sheela@example.com	--	Management	James	Team Lead	Lead	
EMPP-0046	Miss. lana	lana@example.com	--	System Admin	James	Quality Analyst	Employee	
EMPP-0022	Mr. kiran Manager	kiran@example.com	--	Manager	jacob	Manager	Manager	
EMPP-0023	Mr. sashi employee	haritha.murari@sagarsoft.in	--	Employee	kiran Manager	Software Engineer	Sr Employee	
EMPP-0037	Mr. Ramya	empp12@example.com	--	Employee	jacob	Software Engineer	Sr Employee	
EMPP-0006	Miss. Sharon	haritha.murari1@sagarsoft.in	--	HR manager	Paul	Manager	Manager	
EMPP-0026	Mr. candid	candid@example.com	--	Employee	Sharon	Software Engineer	Sr Employee	
EMPP-0038	Mr. candidate eight	empp3@example.com	--	Software Engineer	jacob	Quality Analyst	Employee	
EMPP-0003	Mrs. Anderson neo	Anderson@example.com	--	Manager	Thomas	Manager	Manager	
EMPP-0005	Miss. Jennifer	Jennifer@example.com	--	Software Engineer	Anderson neo	Team Lead	Lead	
EMPP-0007	Mr. Adams	Adams@example.com	--	System Admin	Anderson neo	System Admin	Sysadmin	
EMPP-0009	Mr. Employee.HRMS	hrmsemployee001@gmail.com	--	Software Engineer	Anderson neo	Software Engineer	Sr Employee	
EMPP-0013	Mr. externaluser.hrms	externaluser.hrms@gmail.com	--	Software Engineer	Adams	Software Engineer	Sr Employee	
EMPP-0017	Mr. Joshua	empp1@example.com	--	Employee	Jennifer	Quality Analyst	Employee	
EMPP-0019	Mrs. Daniel	vsunitha32@yahoo.com	--	Employee	reciever and manager	Software Engineer	Sr Employee	
EMPP-0034	Miss. gfqfdg	gf@example.com	--	Employee	Anderson neo	Quality controller	Sr QC	

Records per page: 20 | Page 1 of 2

GENERATE REPORT Reset

Figure 19.1

Or, to generate custom reports

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

Refer Figure 19.2

Home > Analytics > Employees Report

◀ Back to Analytics ▶ Back to Dashboard

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

Export to PDF
Export to Excel

Generate Custom Report

Reporting Manager

Department
 Select Department

Role
 Select Role

Job Title
 Select Job Title

Position
 Select Position

Employment Status
 Select Employment Status

Joined Date

Mode of Employment
 Select Mode Of Employm...

GENERATE REPORT

f

g Reset

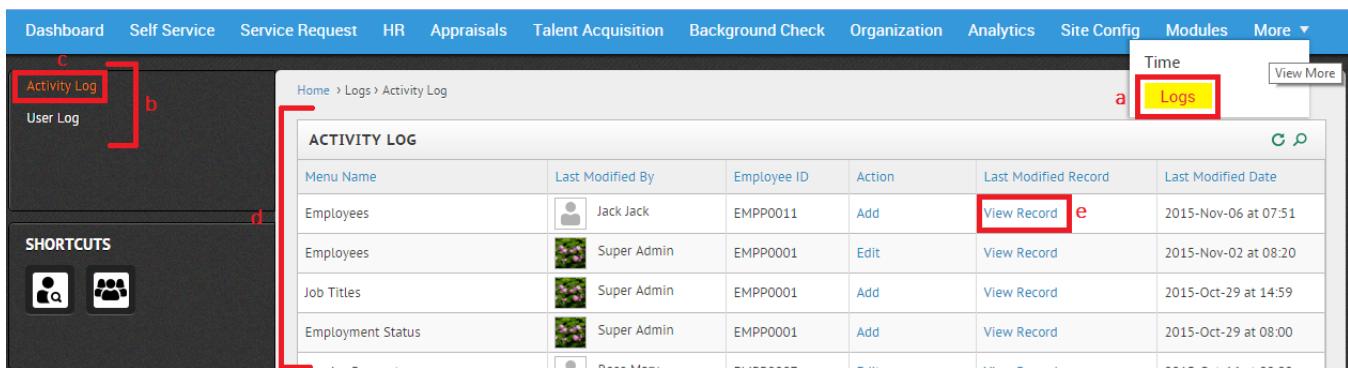
EMPLOYEES							
Employee ID	Employee	Email	Mobile	Role	Reporting Manager	Job Title	Position
EMPP-0008	Mr. Joseph	joseph@example.com	--	Software Engineer	Anderson neo	Software Engineer	Sr Employee
EMPP-0020	Mr. Jacob	harith08@yahoo.com	--	Management	Paul	Manager	Manager
EMPP-0011	Mr. Jim	manager.hrms@gmail.com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

Records per page **20** ▼
◀ ◀
▶ ▶
Page 1 of 2

Figure 19.2

View Activity log

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

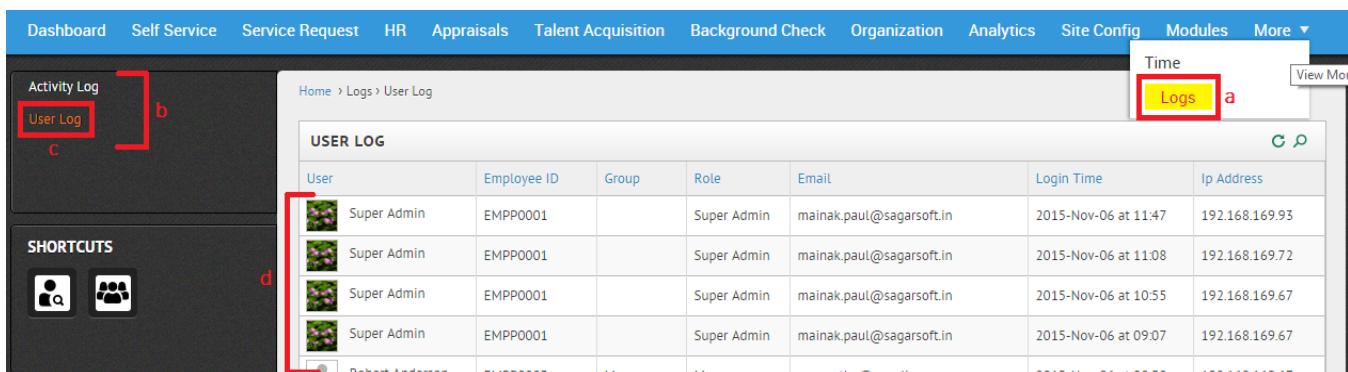


Menu Name	Last Modified By	Employee ID	Action	Last Modified Record	Last Modified Date
Employees	Jack Jack	EMPP0011	Add	View Record	2015-Nov-06 at 07:51
Employees	Super Admin	EMPP0001	Edit	View Record	2015-Nov-02 at 08:20
Job Titles	Super Admin	EMPP0001	Add	View Record	2015-Oct-29 at 14:59
Employment Status	Super Admin	EMPP0001	Add	View Record	2015-Oct-29 at 08:00

Figure 20

View User log

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



User	Employee ID	Group	Role	Email	Login Time	Ip Address
Super Admin	EMPP0001		Super Admin	mainak.paul@sagarsoft.in	2015-Nov-06 at 11:47	192.168.169.93
Super Admin	EMPP0001		Super Admin	mainak.paul@sagarsoft.in	2015-Nov-06 at 11:08	192.168.169.72
Super Admin	EMPP0001		Super Admin	mainak.paul@sagarsoft.in	2015-Nov-06 at 10:55	192.168.169.67
Robert Anderson	EMPP0001	Manager	Manager	user@sentrifugo.com	2015-Nov-06 at 09:07	107.120.120.27

Figure 20.1

Set Shortcuts

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

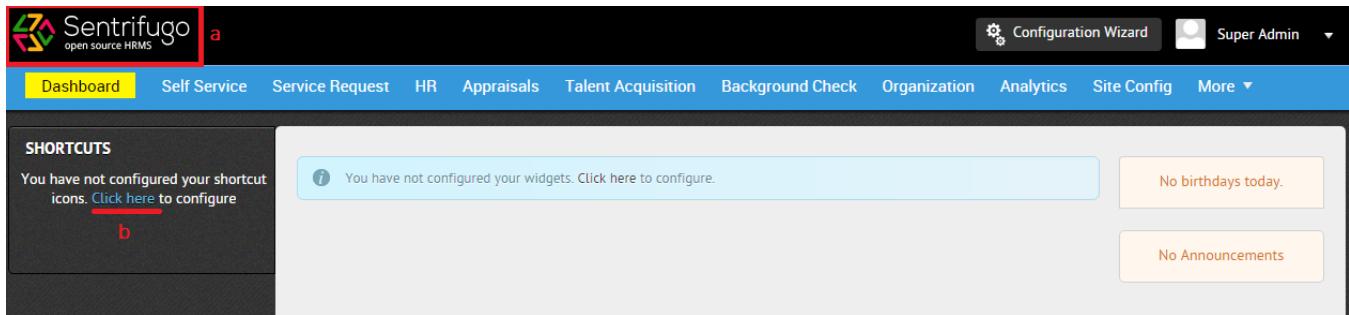


Figure 21

Or

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

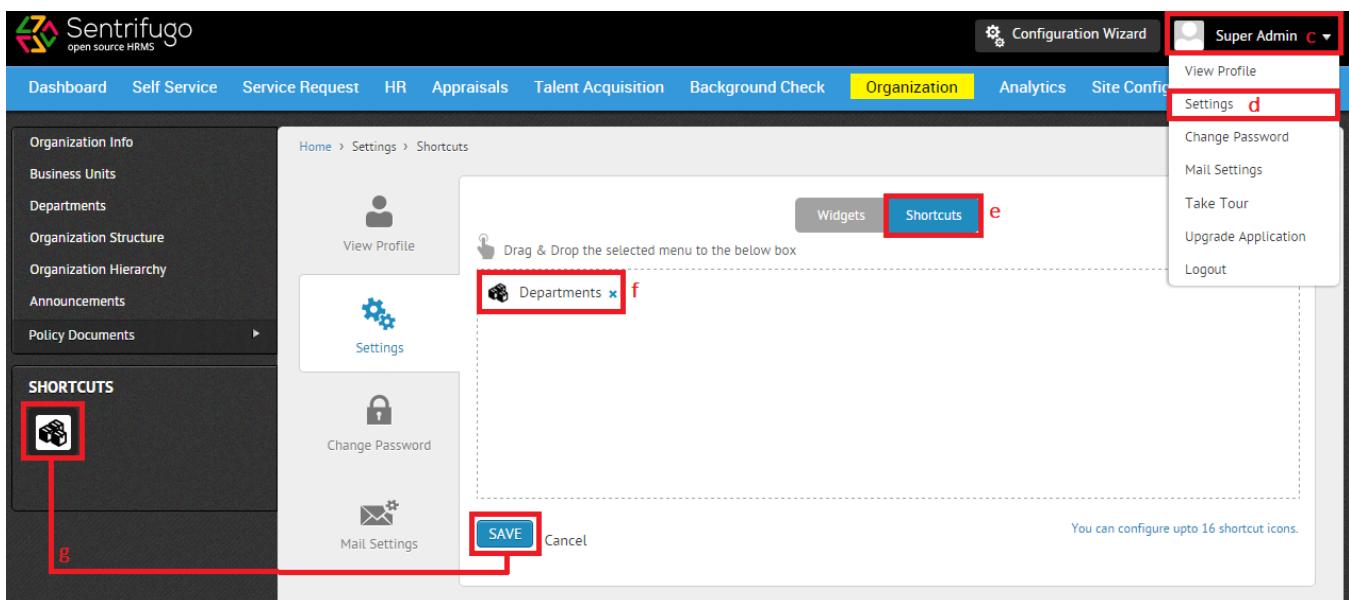
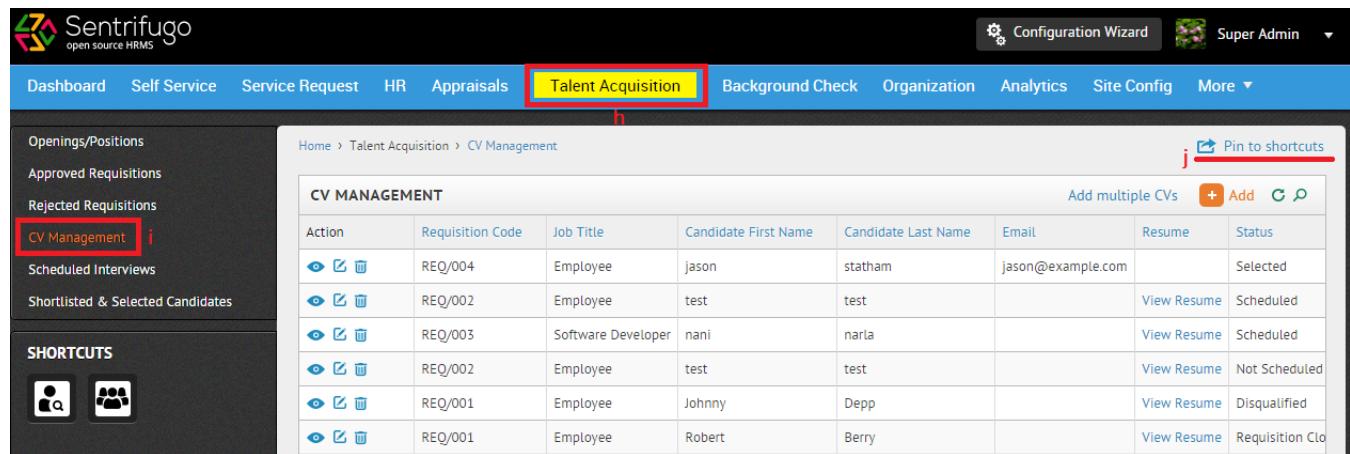


Figure 21.1

You can also create Shortcuts as you browse through the application

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

For further understanding, Refer Figure 21.2, which explains about creating a shortcut as you browse through the application



The screenshot shows the Sentrifugo application interface. The top navigation bar includes links for Configuration Wizard, Super Admin, Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition (which is highlighted with a yellow box), Background Check, Organization, Analytics, Site Config, and More. The left sidebar has sections for Openings/Positions, Approved Requisitions, Rejected Requisitions, CV Management (which is highlighted with a red box), Scheduled Interviews, and Shortlisted & Selected Candidates. The main content area is titled 'CV MANAGEMENT' and displays a table of candidate records. The table columns are Action, Requisition Code, Job Title, Candidate First Name, Candidate Last Name, Email, Resume, and Status. The data in the table is as follows:

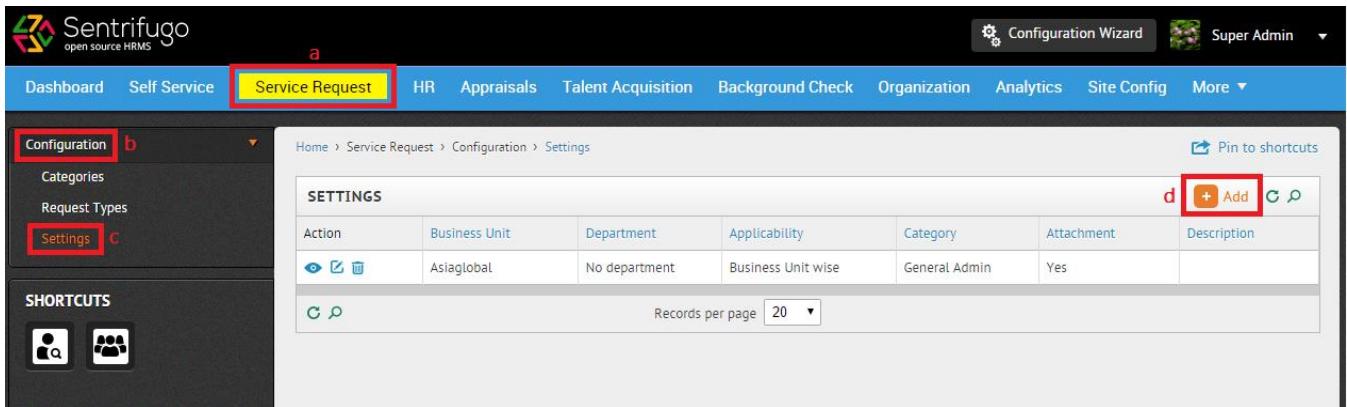
Action	Requisition Code	Job Title	Candidate First Name	Candidate Last Name	Email	Resume	Status
	REQ/004	Employee	jason	statham	jason@example.com		Selected
	REQ/002	Employee	test	test		View Resume	Scheduled
	REQ/003	Software Developer	nani	naria		View Resume	Scheduled
	REQ/002	Employee	test	test		View Resume	Not Scheduled
	REQ/001	Employee	Johnny	Depp		View Resume	Disqualified
	REQ/001	Employee	Robert	Berry		View Resume	Requisition Clo.

Figure 21.2

Configure Service Request

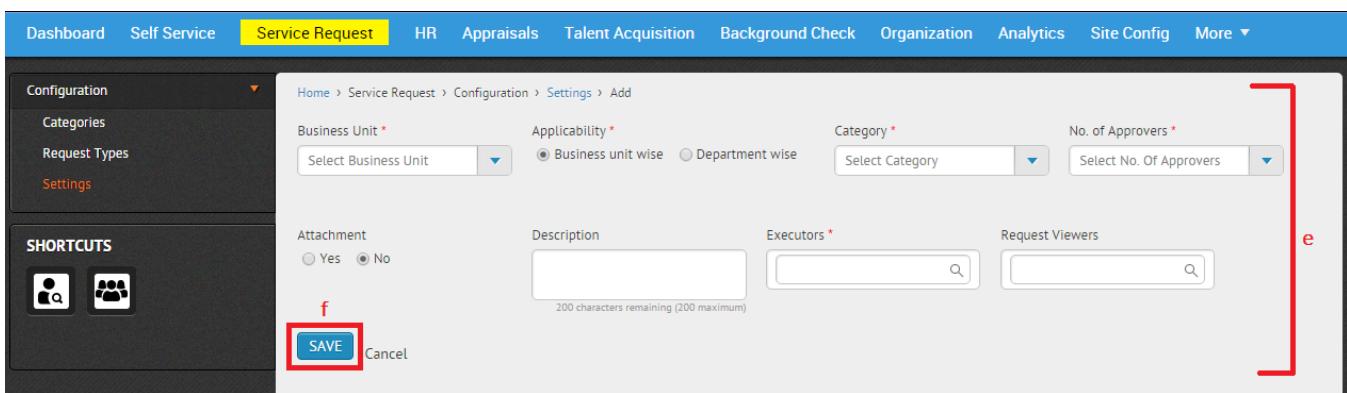
- a. Click on the Service Request in the top menu
- b. The left side panel will display the submenus
- c. Click on desired submenu
- d. Click on Add button on the right side panel
- e. Enter the Required details
- f. Click Save button to add the details

Refer Figure 22 & 22.1



The screenshot shows the Sentrifugo web interface. At the top, there is a navigation bar with links: Dashboard, Self Service, Service Request (highlighted with a yellow box), HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, More, Configuration Wizard, and Super Admin. On the left, a sidebar titled 'Configuration' has sections for Categories, Request Types, and Settings (highlighted with a red box). Below the sidebar is a 'SHORTCUTS' section with icons for users and groups. The main content area is titled 'SETTINGS' and contains a table with columns: Action, Business Unit, Department, Applicability, Category, Attachment, and Description. A row in the table shows: Action (eye icon), Business Unit (Asiaglobal), Department (No department), Applicability (Business Unit wise), Category (General Admin), Attachment (Yes), and Description (empty). There are also buttons for '+ Add' and 'Pin to shortcuts'. At the bottom of the table are search and records per page controls.

Figure 22

The screenshot shows the 'Add' page for configuration settings. The top navigation bar and sidebar are identical to Figure 22. The main form has fields for Business Unit (dropdown with 'Select Business Unit'), Applicability (radio buttons for 'Business unit wise' and 'Department wise' with 'Business unit wise' selected), Category (dropdown with 'Select Category'), and No. of Approvers (dropdown with 'Select No. Of Approvers'). Below these are sections for Attachment (radio buttons for 'Yes' and 'No' with 'No' selected), Description (text input with placeholder '200 characters remaining (200 maximum)'), Executors (multiple select input), and Request Viewers (multiple select input). At the bottom are 'SAVE' and 'Cancel' buttons (the 'SAVE' button is highlighted with a red box). A red bracket labeled 'e' spans from the 'Category' field to the 'Request Viewers' field. A red bracket labeled 'f' spans from the 'Attachment' section to the 'Description' section.

Figure 22.1

Set Cron Jobs

You should receive an email upon successful installation of Sentrifugo.

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

Note: Always run the cron jobs after signing out of Sentrifugo.



Cron Job

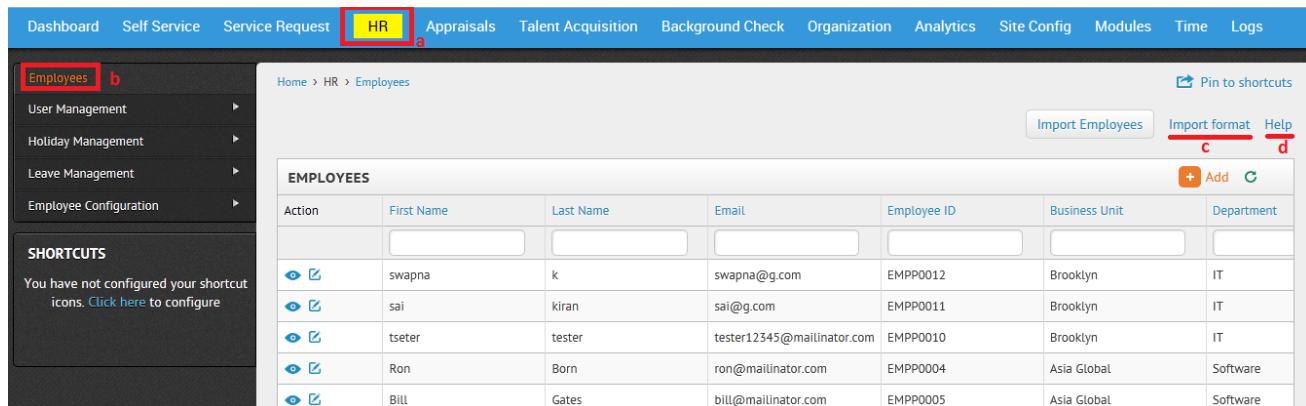
<http://sentrifugo/cronjob/>

<http://sentrifugo/cronjob/empdocsexpiry>

Figure 23

Download Import Format

- Click on HR in the top menu
- Click on Employees submenu on the left side panel
- Click on Import Format link above the employee details grid on the right side to download the format
- For further guidance, click on the Help link



Dashboard Self Service Service Request **HR** a Appraisals Talent Acquisition Background Check Organization Analytics Site Config Modules Time Logs

Employees b

User Management Holiday Management Leave Management Employee Configuration

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

Home > HR > Employees

Import Employees Import format Help c d

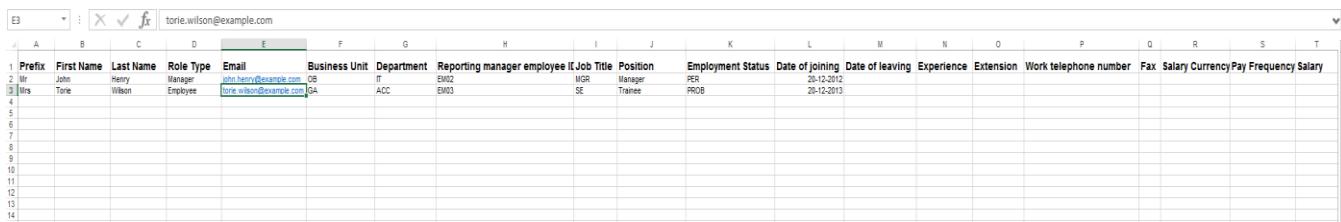
+ Add C

Action	First Name	Last Name	Email	Employee ID	Business Unit	Department
	swapna	k	swapna@g.com	EMPP0012	Brooklyn	IT
	sai	kiran	sai@g.com	EMPP0011	Brooklyn	IT
	tseter	tester	tester12345@mailinator.com	EMPP0010	Brooklyn	IT
	Ron	Born	ron@mailinator.com	EMPP0004	Asia Global	Software
	Bill	Gates	bill@mailinator.com	EMPP0005	Asia Global	Software

Figure 24

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

Refer Figure 24.1 for the import format



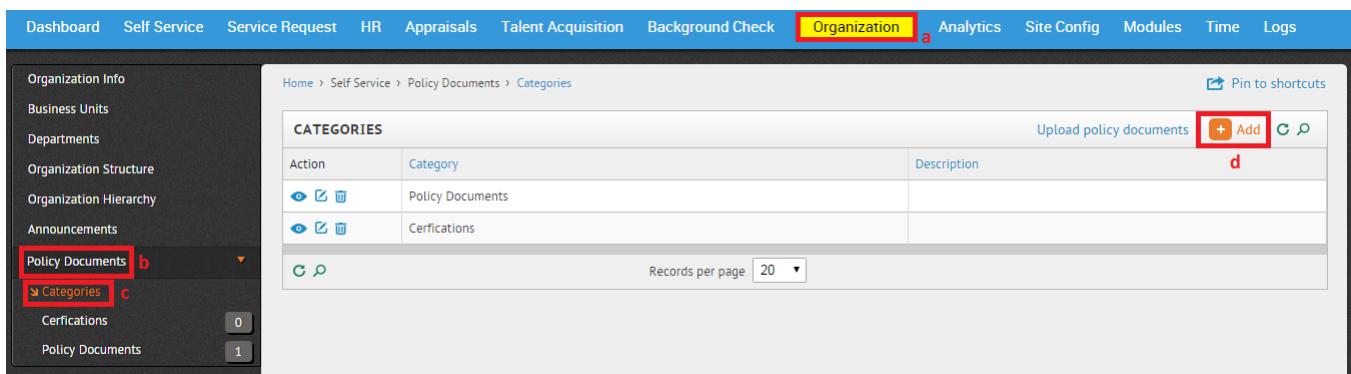
Prefix	First Name	Last Name	Role Type	Email	Business Unit	Department	Reporting manager employee ID	Job Title	Position	Employment Status	Date of joining	Date of leaving	Experience	Extension	Work telephone number	Fax	Salary	Currency	Pay Frequency	Salary
1 Mr	John	Henry	Manager	john.henry@example.com	OB	IT	EM02	MGR	Manager	PER	20-12-2012									
2 Mrs	Terie	Wilson	Employee	terie.wilson@example.com	GA	ACC	EM03	SE	Trainee	PROB	26-12-2013									
3																				
4																				
5																				
6																				
7																				
8																				
9																				
10																				
11																				
12																				
13																				
14																				

Figure 24.1

Policy Documents

Policies communicate your organization's rules and procedures. Users will have access to view essential documents whenever required. You can easily access & store all the organization's important policy documents

- Select the option Organization in the top menu
- Select the option Policy Documents in the submenu on the left side panel
- Click on Categories
- Click on Add



Action	Category	Description
	Policy Documents	
	Certifications	

Figure 25

Create a category by filling in the field 'Category' with the category name. Click on ADD to complete the step.

Refer Figure 25.1

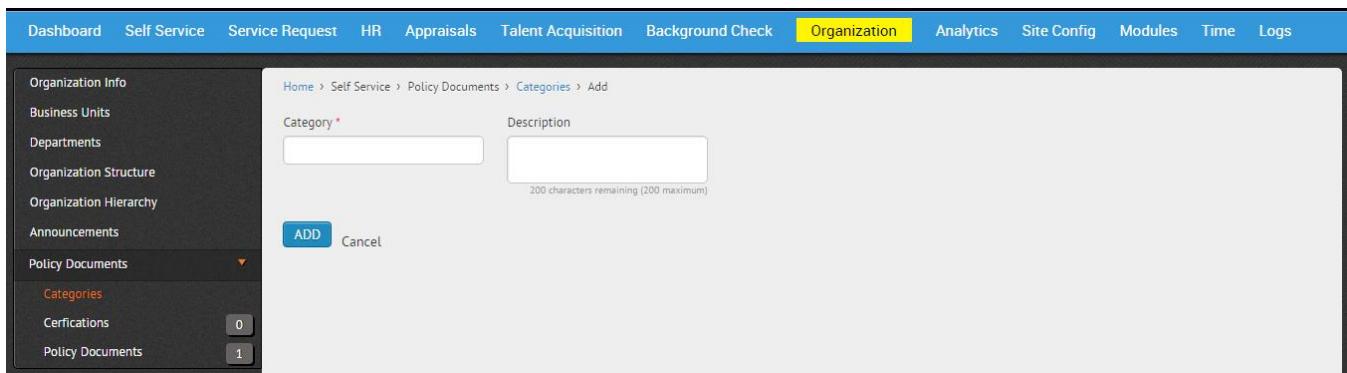


Figure 25.1

Upload Policy Documents

- e. Click on the link 'Upload policy documents'

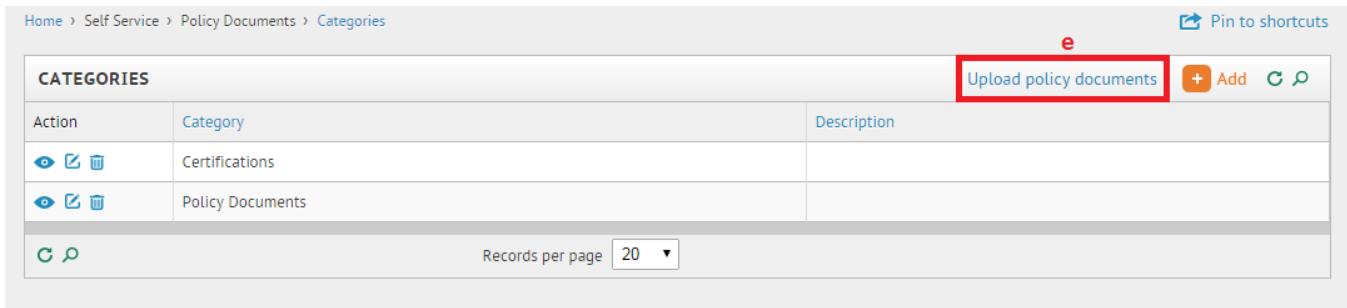


Figure 25.2

Or

After adding the policy documents categories, you will find that the categories will appear on the left side panel below the option 'Categories'.

- f. Click on a category which you had created on the left side panel
- g. Click on Add.

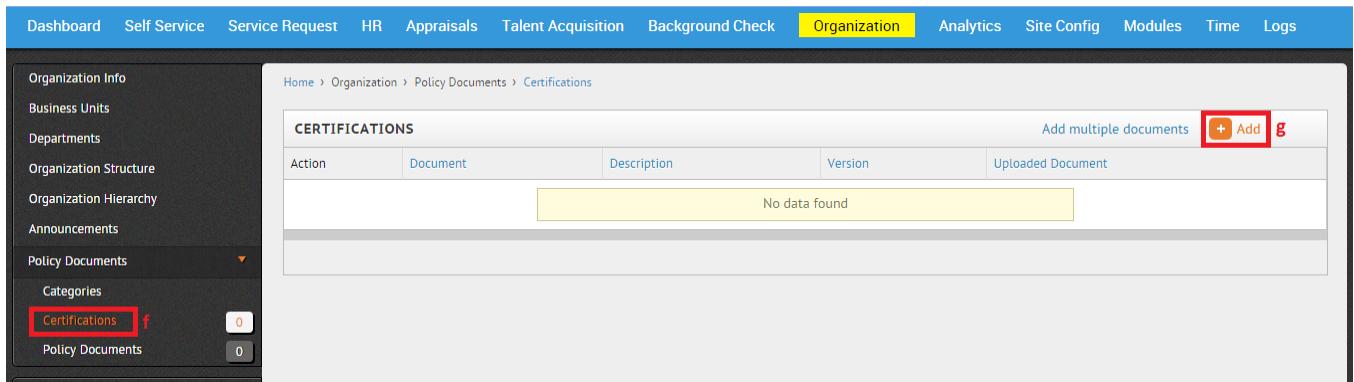


Figure 25.3

The following screen will appear (for both cases Figure 25.2 & 25.3):

- a. Document name
- b. Document category (previously created category)
- c. Add a category
- d. Document Description
- e. Document Version
- f. Upload a document (Allowed file extensions: doc, docx, pdf)
- g. Add the document

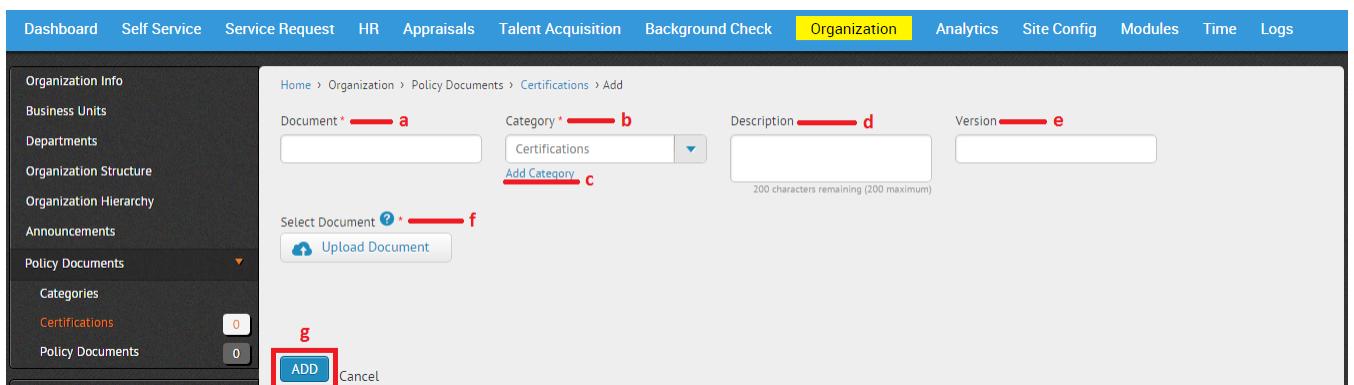


Figure 25.4

Upload Multiple Documents

- h. Select a category you had created on the left side panel
- i. Click on 'Add multiple documents'

Refer Figure 25.5

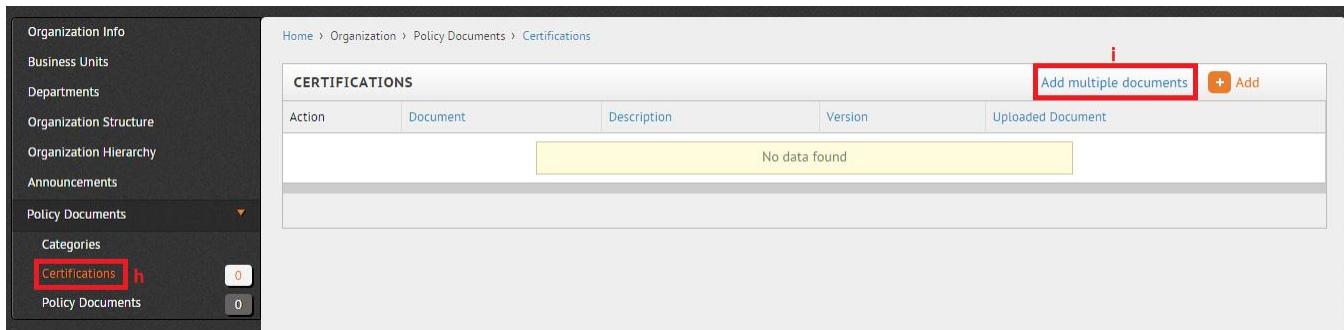


Figure 25.5

- j. Category name
- k. Add multiple documents (Max 5)
- l. Document name
- m. Document Description
- n. Document Version
- o. Upload Document
- p. Add the document(s) .

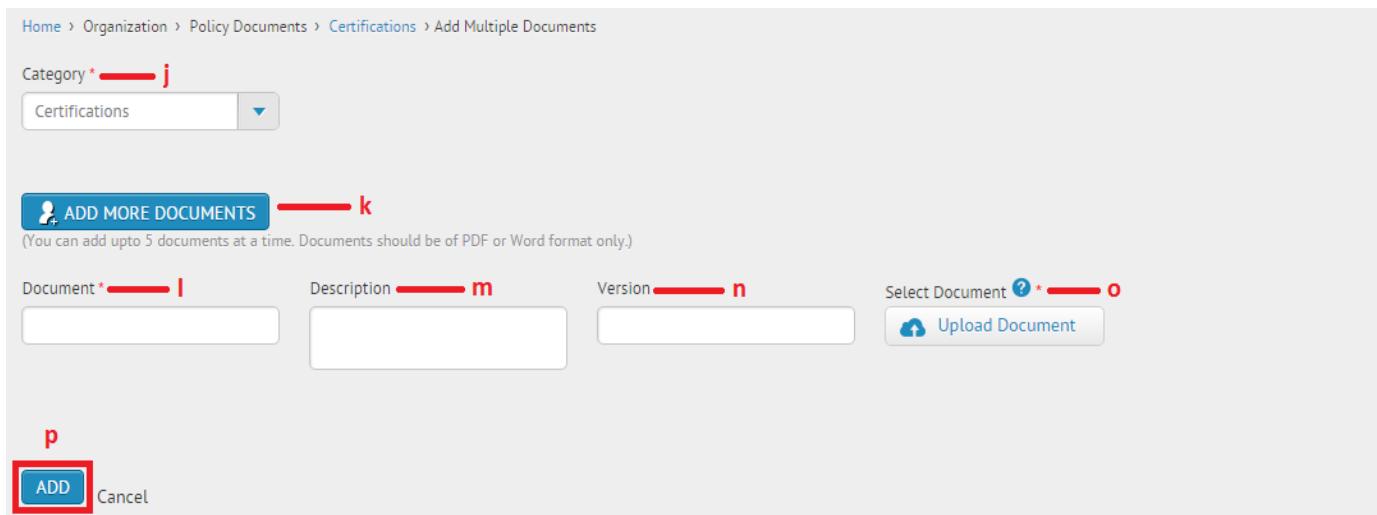


Figure 25.6

Configuration Wizard for HR

When an HR users log into Sentrifugo for the first time, they will need to configure the following steps:

1. Configure Leave Types: HR can create different leave types (e.g. Sick, Annual etc.) and allocate days for each leave type.
 - a. Name of the leave type
 - b. Number of days allocated to the leave type
 - c. Add more leave types
 - d. Save the leave types you have configured and added
 - e. Click here to proceed to the next step

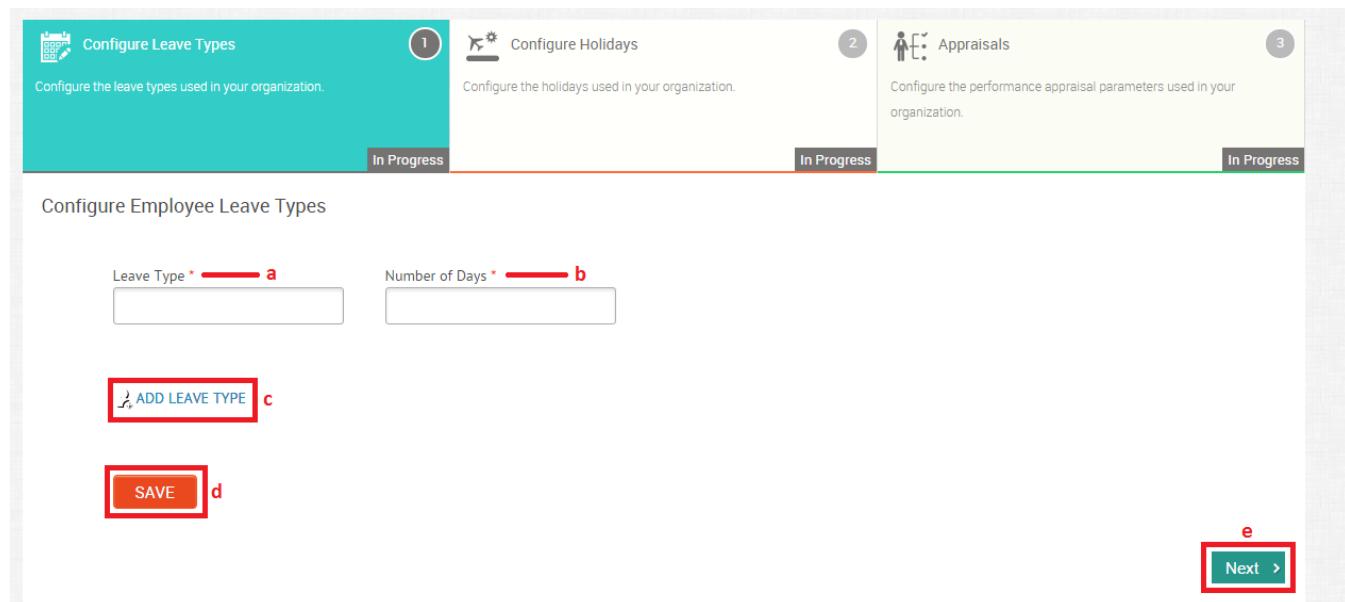


Figure 26

2. Configure Holidays: Certain organizations have branches/projects based in different countries and hence have a different holiday pattern. Create holiday groups so that various groups of employees having different holidays can be placed under different groups.
 - f. Holiday group name
 - g. Holiday name
 - h. Add more holiday groups names
 - i. Holiday date
 - j. Add more holiday names
 - k. Save the holiday groups added
 - l. Go to the previous step
 - m. Proceed to the next step

Refer Figure 26.1

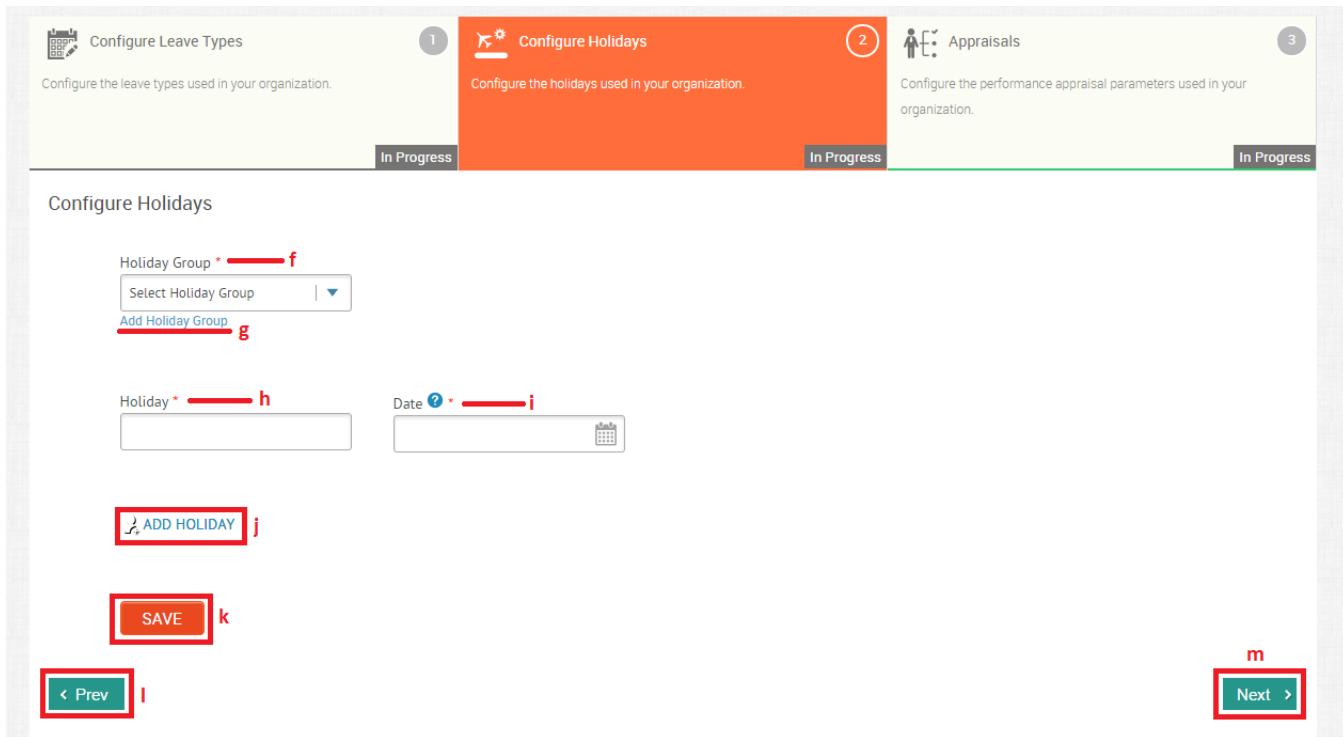
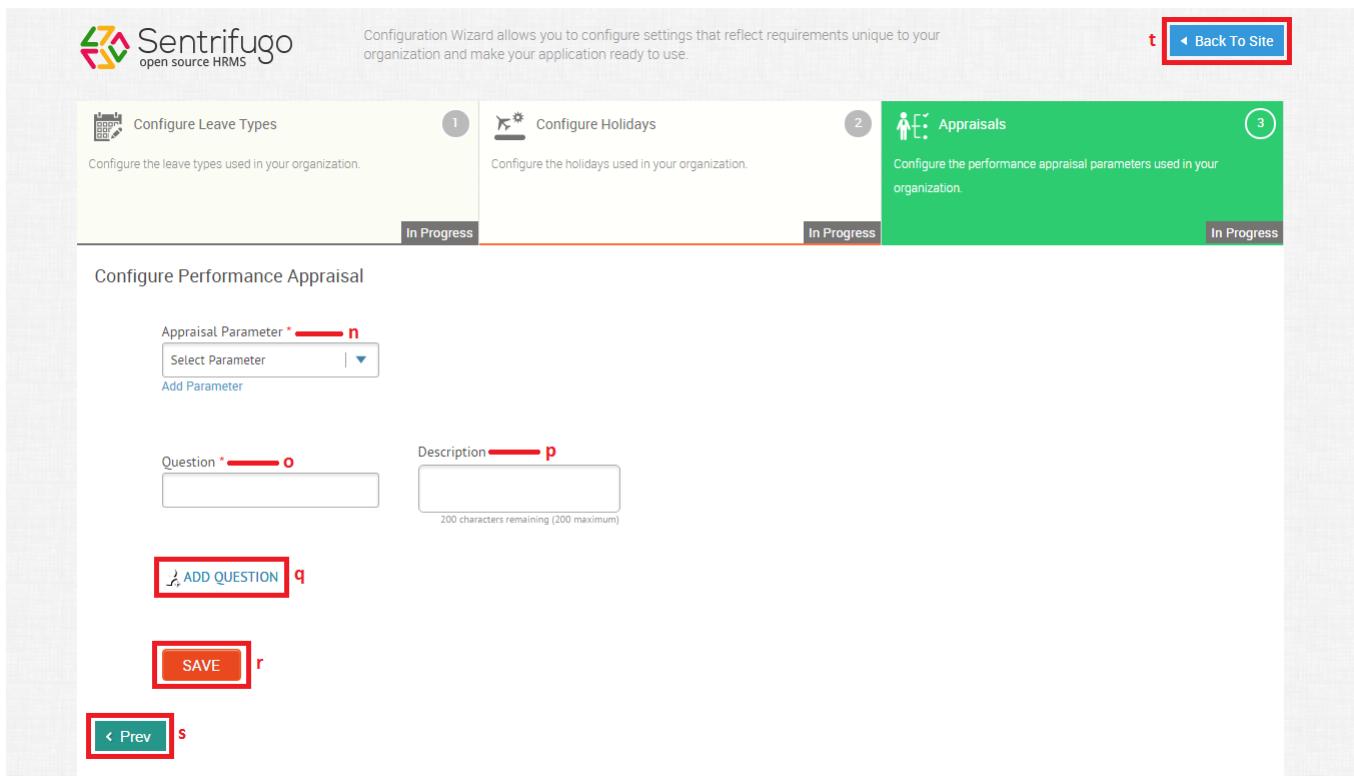


Figure 26.1

3. Configure Performance Appraisals: Configure the appraisal parameters and questions required for the performance appraisal process.

- n. Parameter name
- o. Question for the appraisal process
- p. Question's description
- q. Add more questions
- r. Save the parameters and questions added
- s. Go to previous steps
- t. Back to the application site

Refer Figure 26.2



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

t Back To Site

Configure Leave Types Configure Holidays Appraisals

1 2 3

Configure the leave types used in your organization.

Configure the holidays used in your organization.

Configure the performance appraisal parameters used in your organization.

In Progress In Progress In Progress

Configure Performance Appraisal

Appraisal Parameter * — n

Select Parameter | ▾

Add Parameter

Question * — o

Description — p

200 characters remaining (200 maximum)

ADD QUESTION q

SAVE r

< Prev s

Figure 26.2

Appraisal

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

In Sentrifugo, the appraisal is configured for an entire business unit or for a specific department in a business unit. Please refer our Appraisal process guide for a detailed description on how the Performance Appraisal process works in Sentrifugo.

Time

Sentrifugo's Time Module is a unique Timesheet Management tool. Managers can configure projects details and add employees to projects. They can view timesheets of the employees reporting to them in a daily, weekly or monthly view format. Employees can enter the hours spent on an assigned project. Employee and project based time reports can be generated based on the details entered by the employees. Please refer our Time Management process guide for a detailed description on how the Time Management process works in Sentrifugo.