



# Sentrifugo

open source HRMS

## 3.0 User Guide

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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 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. Hover the mouse pointer over this icon to view a brief description for an option

# 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.



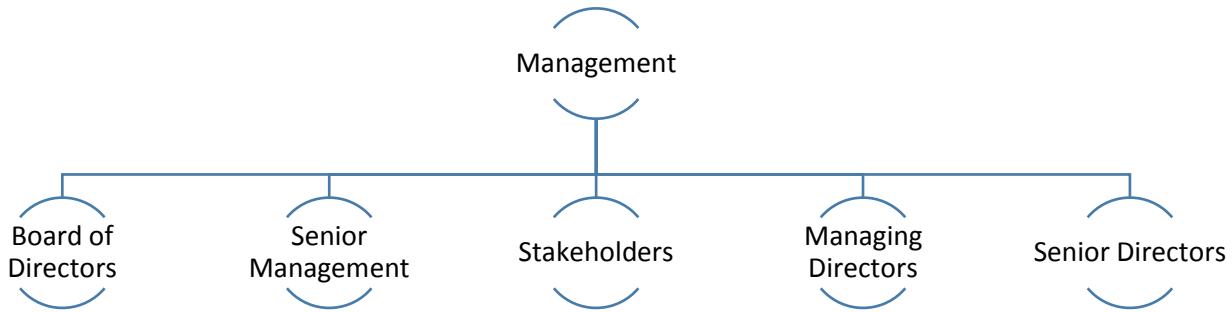
Since the Super Admin will not be included in the employee's list, he/she will not be able to perform employee actions like raising a leave request, service request, submitting timesheets etc. You can add another employee to Sentrifugo for the Super Admin user, with his/her actual details like Name,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

 Dear Super Admin,

Sentrifugo has been successfully installed. Following are the Super Admin login credentials for Sentrifugo:

Username : empp0001	a
Password : 57b69a6fc1cdd	

**Pre-requisites**

- PHP v5.3 or greater
- PDO-Mysql extension for PHP (pdo\_mysql)
- GD Library (gd)
- Open SSL (openssl)

**Database Settings**

- Host: localhost
- User name: root
- Password: --
- Database: sentrifugo1

**Application Settings**

- Application name: Sentrifugo
- Email: [vradhika@sapplica.com](mailto:vradhika@sapplica.com)

**Mail Server Settings**

- Authentication: true
- User name: [tejadeveloper123@gmail.com](mailto:tejadeveloper123@gmail.com)
- Password: sapplica
- SMTP server: [smtp.gmail.com](mailto:smtp.gmail.com)
- Secure Transport Layer: TLS
- Port: 587

**Cron Job**

- <http://localhost/Sentrifugo/index.php/cronjob>
- <http://localhost/Sentrifugo/index.php/cronjob/empdocsexpiry>
- <http://localhost/Sentrifugo/index.php/timemanagement/cronjob>

Regards,  
**Sentrifugo**

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.*

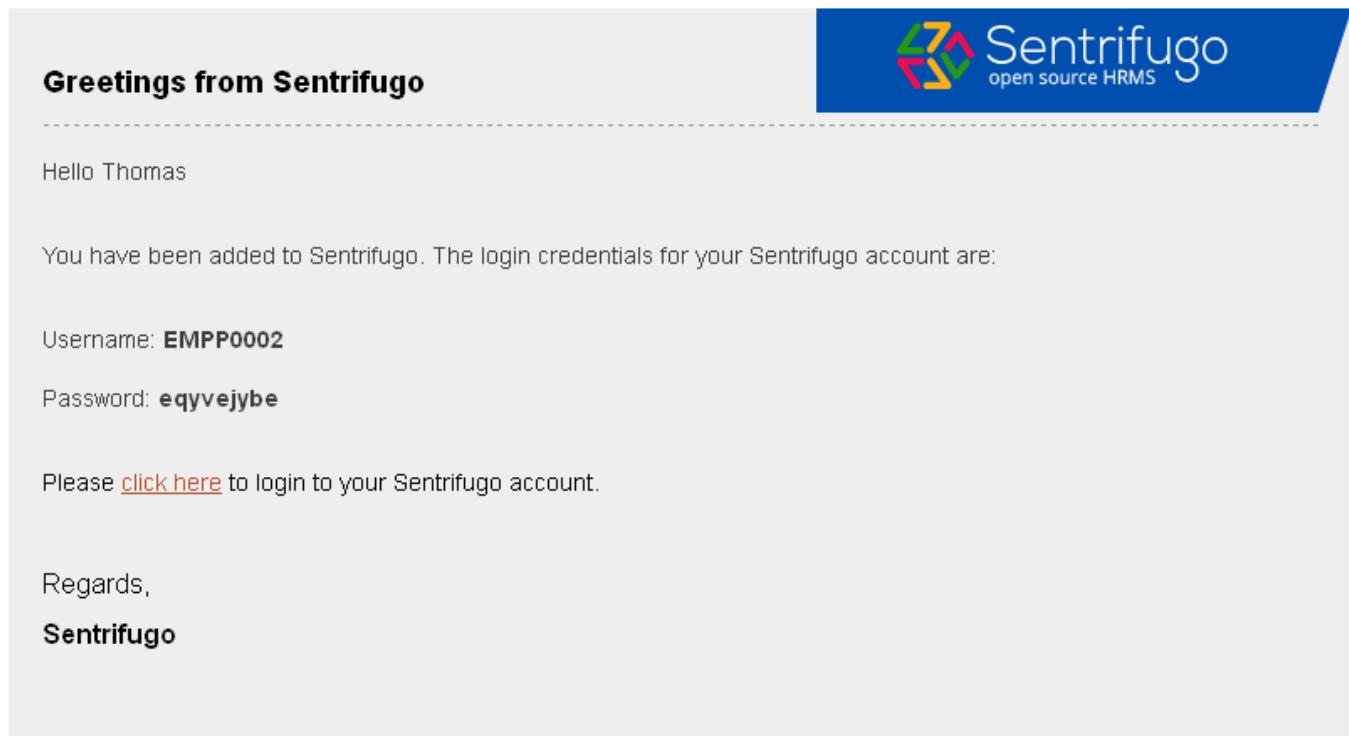
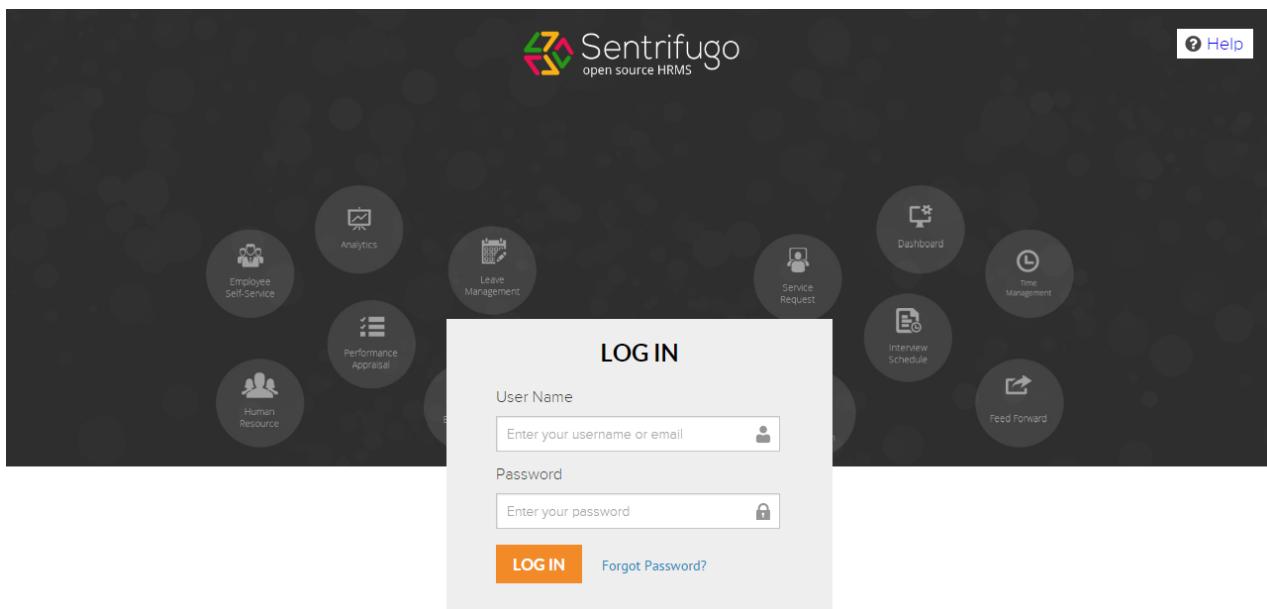


Figure 3

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



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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.*

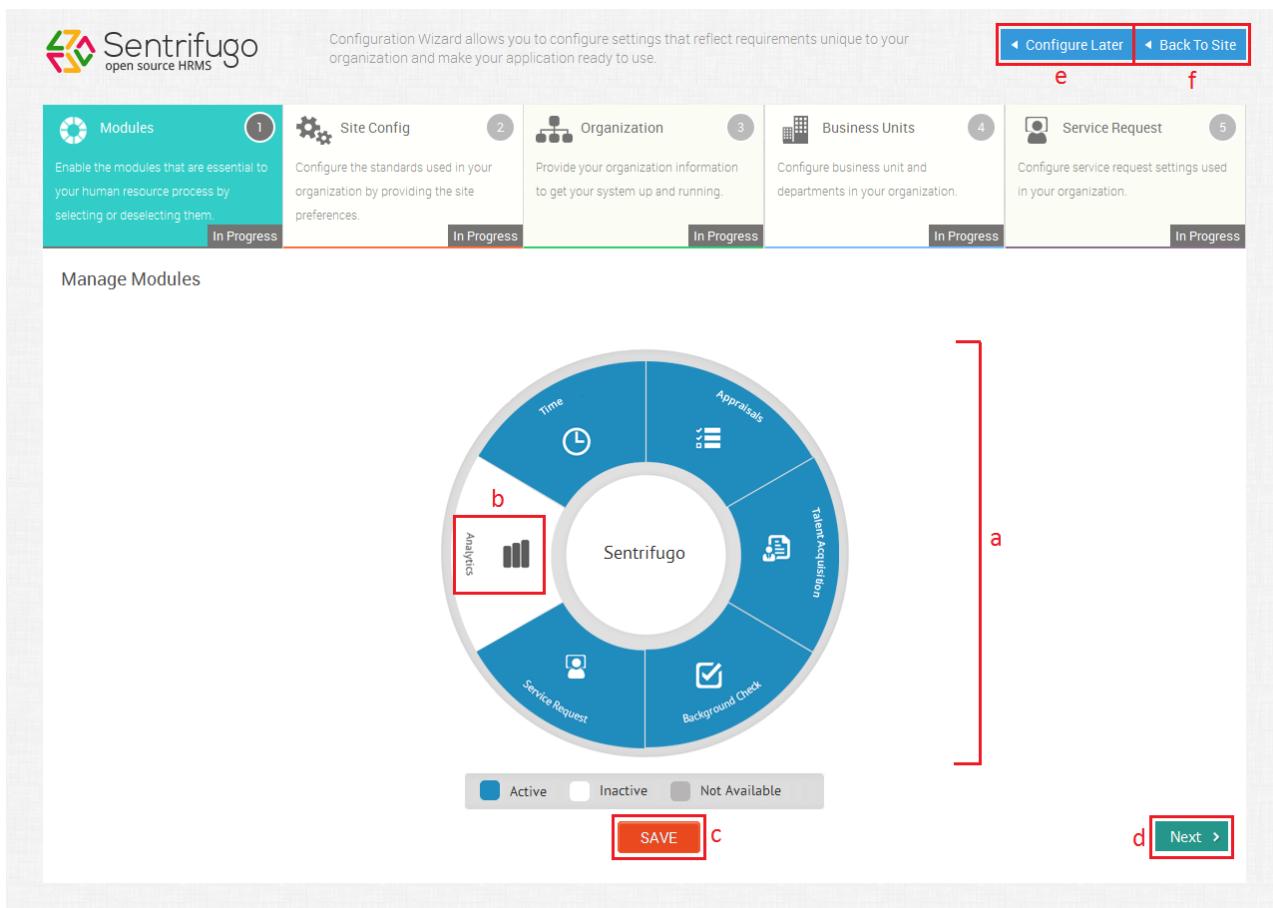


Figure 4

- All the modules are displayed in a circular representation
- Click on a module icon to activate or inactivate 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	 Organization	 Business Units	 Service Request
Completed	In Progress	3	4	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.

**Site Configuration**

Employee Code ? \*

Currency ? \*

Date Format ? \*

Time Format ? \*

Default Time Zone ? \*

Country ? \*

State ? \*

City ? \*

Default Password ? \*

Employment Status ? \*

**SAVE**

[◀ Prev](#) [Next ▶](#)

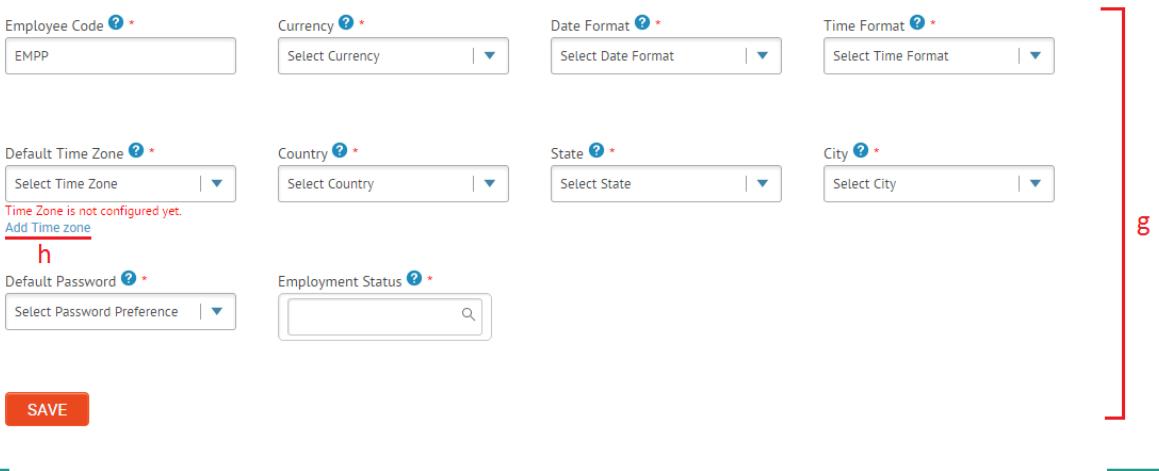


Figure 5

- 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](#)

 Modules	 Site Config	 Organization <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">3</span>	 Business Units <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">4</span>	 Service Request <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">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;">In Progress</span>	<span style="background-color: #2e6b2e; color: white; padding: 2px 5px;">In Progress</span>	<span style="background-color: #2e6b2e; color: white; padding: 2px 5px;">In Progress</span>

Configure Organization Information

Organization <span style="color: red;">?</span> *	Website <span style="color: red;">?</span> *	Organization Started On <span style="color: red;">?</span>	Total Employees <span style="color: red;">?</span> *
<input type="text"/>	<input type="text"/>	<input type="date"/>	<input type="text" value="20-50"/>
Primary Phone Number <span style="color: red;">?</span>	Secondary Phone Number <span style="color: red;">?</span>	Fax Number <span style="color: red;">?</span>	Country <span style="color: red;">?</span> *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="United States"/> <span style="border: 1px solid red; border-radius: 5px; padding: 2px 5px;">Add Country</span> <span style="color: red;">i</span>
State <span style="color: red;">?</span> *	City <span style="color: red;">?</span> *	Main Branch Address <span style="color: red;">?</span>	Address 1 <span style="color: red;">?</span>
<input type="text" value="Georgia"/> <span style="border: 1px solid red; border-radius: 5px; padding: 2px 5px;">Add State</span> <span style="color: red;">j</span>	<input type="text" value="Atlanta"/> <span style="border: 1px solid red; border-radius: 5px; padding: 2px 5px;">Add City</span> <span style="color: red;">k</span>	<input type="text"/>	<input type="text"/>
Address 2 <span style="color: red;">?</span>	Organization Description <span style="color: red;">?</span>		
<input type="text"/>	<input type="text"/>		
Upload Organization Logo <span style="color: red;">?</span>		Business Domain <span style="color: red;">?</span>	
 <span style="border: 1px solid #ccc; padding: 2px 5px;">Upload Logo</span>		<input type="text"/> <span style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;">Q</span>	

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

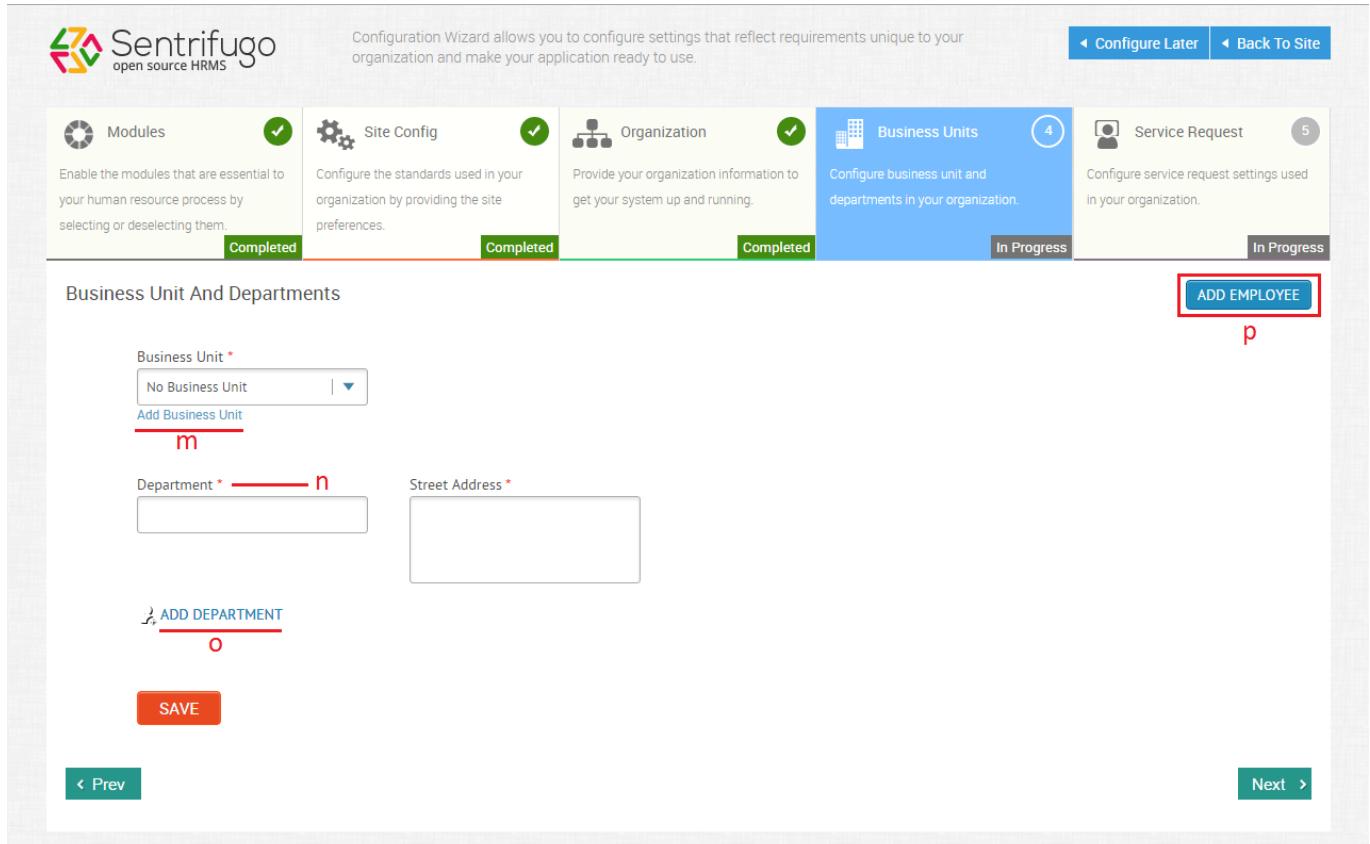
After saving your organization's details, an **ADD Employee** button will appear on the top right corner of the configuration wizard screen. However, it is not mandatory to add an employee in this step, you can even add an employee after the entire configuration is completed.

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.

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

 <b>Modules</b> <span style="color: green;">✓</span>	 <b>Site Config</b> <span style="color: green;">✓</span>	 <b>Organization</b> <span style="color: green;">✓</span>	 <b>Business Units</b> <span style="color: blue;">4</span>	 <b>Service Request</b> <span style="color: grey;">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.
<b>Completed</b>	<b>Completed</b>	<b>Completed</b>	<b>In Progress</b>	<b>In Progress</b>

**Business Unit And Departments**

**Business Unit \*** m

No Business Unit | ▾  
[Add Business Unit](#)

**Department \*** n

[ADD DEPARTMENT](#) o

**Street Address \***

**ADD EMPLOYEE** p

**SAVE**

[◀ Prev](#) [Next ▶](#)

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	 Completed	 Site Config	 Completed	 Organization	 Completed	 Business Units	 Completed	 Service Request	 5 In Progress
Provide your organization information to get your system up and running.					Configure service request settings used in your organization.				

Service Request Categories And Requests

[ADD EMPLOYEE](#)

Category \*  | ▾  
[Add Category](#)

Request Type \*  r s

Description  
  
200 characters remaining (200 maximum)

[ADD REQUEST TYPE](#)

[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.*

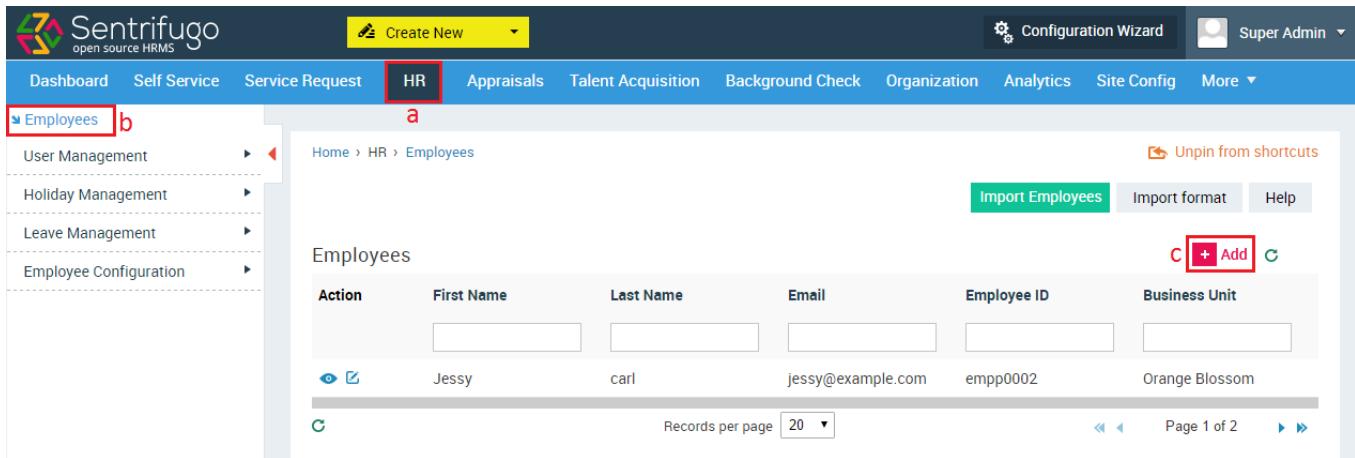
The screenshot shows the 'Employees' section of the Sentrifugo HR module. The 'Management Details' form is displayed. The 'Job Title' and 'Position' fields are highlighted with a red box and labeled 'a'. The 'Job Title' field contains the error message 'Job titles are not configured yet.' and the 'Position' field contains the error message 'Positions are not configured yet.'. A red bracket labeled 'b' points to these two fields. A red bracket labeled 'c' points to the 'Management Description' field. The 'Job Title' and 'Position' fields are both marked with a red asterisk (\*) indicating they are mandatory. The 'Management Description' field has a note below it stating '200 characters remaining (200 maximum)'. At the bottom left are 'SAVE' and 'Cancel' buttons.

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 HRM system interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR (which is highlighted with a red box and labeled 'a'), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, More, Configuration Wizard, and Super Admin. On the left, a sidebar has sections for User Management, Holiday Management, Leave Management, and Employee Configuration, with 'Employees' (labeled 'b') being the active option. The main content area displays a table titled 'Employees' with columns for Action, First Name, Last Name, Email, Employee ID, and Business Unit. A single row is shown for 'Jessy' with values: First Name (Jessy), Last Name (carl), Email (jessy@example.com), Employee ID (empp0002), and Business Unit (Orange Blossom). There are buttons for Import Employees, Import format, and Help. A red box labeled 'c' highlights the '+Add' button in the top right corner of the table header.

Figure 10

- Click **HR** in the top menu
- Click **Employees** option on the left panel
- Click **+Add** button on the right side

*Please refer Figure 11.*

Home > HR > Employees > Add

<input type="checkbox"/> Official <input type="checkbox"/> Documents <input type="checkbox"/> Leaves <input type="checkbox"/> Holidays <input type="checkbox"/> Salary <input type="checkbox"/> Personal <input type="checkbox"/> Contact <input type="checkbox"/> Skills <input type="checkbox"/> Job History <input type="checkbox"/> Experience <input type="checkbox"/> Education <input type="checkbox"/> Training & Certification <input type="checkbox"/> Medical Claims <input type="checkbox"/> Disability <input type="checkbox"/> Dependency <input type="checkbox"/> Visa and Immigration <input type="checkbox"/> Corporate Card <input type="checkbox"/> Work Eligibility <input type="checkbox"/> Additional Details	<table border="0"> <tr> <td style="width: 33%;"> Employee Code *  <input type="text" value="empp"/> </td> <td style="width: 33%;"> Employee Id *  <input type="text"/> <span style="border: 2px solid red; padding: 2px;">d</span> </td> <td style="width: 33%;"> Prefix  <input type="text"/>  Select Prefix  Add Prefix </td> </tr> <tr> <td colspan="2"> First Name *  <input type="text"/> </td> <td>Last Name *  <input type="text"/> </td> </tr> <tr> <td colspan="2"> Mode of Employment *  <input type="text" value="Direct"/> </td> <td></td> </tr> <tr> <td colspan="2"> Role *  <input type="text"/>  Select Role </td> <td>Email *  <input type="text"/> </td> </tr> <tr> <td colspan="2"> Business Unit  <input type="text" value="No Business Unit"/> </td> <td></td> </tr> <tr> <td colspan="2"> Department <small>?</small> *  <input type="text"/>  Select Department </td> <td>Reporting Manager *  <input type="text"/>  Select Reporting Manager </td> </tr> <tr> <td colspan="2"> Job Title  <input type="text"/>  Select Job Title </td> <td><small>Add Job Title</small></td> </tr> <tr> <td colspan="2"> Position <small>?</small>  <input type="text"/>  Select Position </td> <td>Employment Status *  <input type="text"/>  Select Employment Status </td> </tr> <tr> <td colspan="2"> <small>Add Position</small> </td> <td><small>Add Employment Status</small></td> </tr> <tr> <td colspan="2"> Date of Leaving <small>?</small>  <input type="text"/> </td> <td>Date of Joining <small>?</small> *  <input type="text"/>  <span style="border: 1px solid #ccc; padding: 2px;">e</span> </td> </tr> <tr> <td colspan="2"> Years of Experience  <input type="text"/> </td> <td>Work Telephone Number  <input type="text"/> </td> </tr> <tr> <td colspan="2"> Extension  <input type="text"/> </td> <td>Fax  <input type="text"/> </td> </tr> <tr> <td colspan="3" style="text-align: center;"> <span style="border: 1px solid red; padding: 2px; background-color: #0070C0; color: white; cursor: pointer;">f</span> Save      Cancel </td> </tr> </table>	Employee Code * <input type="text" value="empp"/>	Employee Id * <input type="text"/> <span style="border: 2px solid red; padding: 2px;">d</span>	Prefix <input type="text"/> Select Prefix Add Prefix	First Name * <input type="text"/>		Last Name * <input type="text"/>	Mode of Employment * <input type="text" value="Direct"/>			Role * <input type="text"/> Select Role		Email * <input type="text"/>	Business Unit <input type="text" value="No Business Unit"/>			Department <small>?</small> * <input type="text"/> Select Department		Reporting Manager * <input type="text"/> Select Reporting Manager	Job Title <input type="text"/> Select Job Title		<small>Add Job Title</small>	Position <small>?</small> <input type="text"/> Select Position		Employment Status * <input type="text"/> Select Employment Status	<small>Add Position</small>		<small>Add Employment Status</small>	Date of Leaving <small>?</small> <input type="text"/>		Date of Joining <small>?</small> * <input type="text"/> <span style="border: 1px solid #ccc; padding: 2px;">e</span>	Years of Experience <input type="text"/>		Work Telephone Number <input type="text"/>	Extension <input type="text"/>		Fax <input type="text"/>	<span style="border: 1px solid red; padding: 2px; background-color: #0070C0; color: white; cursor: pointer;">f</span> Save      Cancel		
Employee Code * <input type="text" value="empp"/>	Employee Id * <input type="text"/> <span style="border: 2px solid red; padding: 2px;">d</span>	Prefix <input type="text"/> Select Prefix Add Prefix																																						
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Extension <input type="text"/>		Fax <input type="text"/>																																						
<span style="border: 1px solid red; padding: 2px; background-color: #0070C0; color: white; cursor: pointer;">f</span> Save      Cancel																																								

Figure 11

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



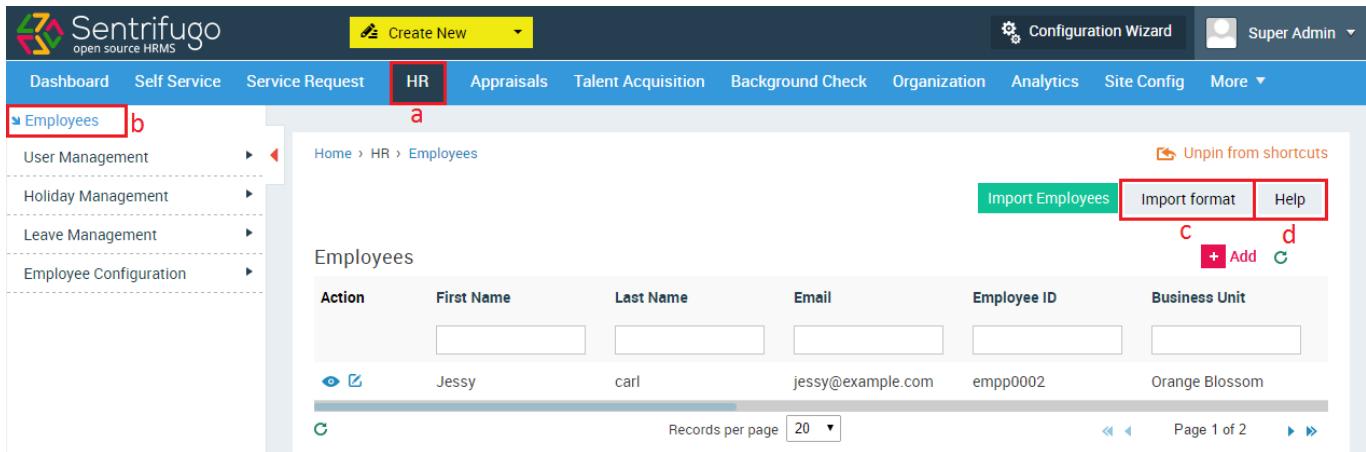
Only the Super Admin's ID number will be fixed as 0001. All the other Employees including the Organization Head can have customized employee ID numbers. For example:

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.*

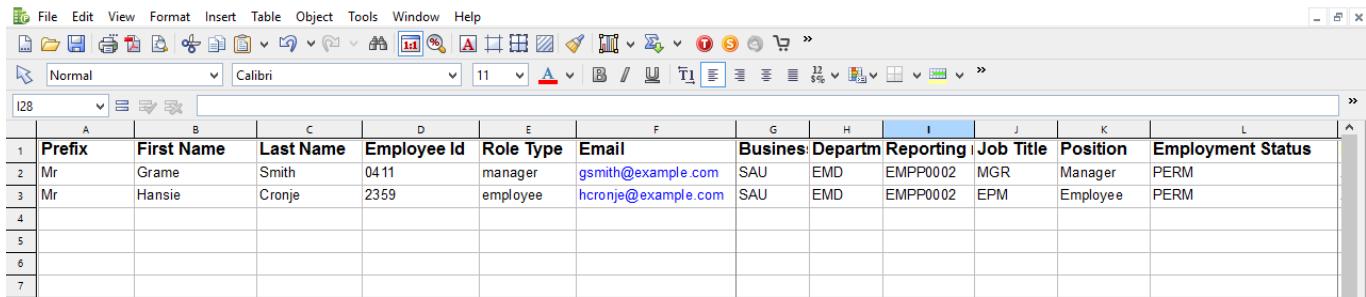


The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has categories like Dashboard, Self Service, Service Request, HR (highlighted), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists User Management, Holiday Management, Leave Management, and Employee Configuration. The central area shows a grid of employees with columns for Action, First Name, Last Name, Email, Employee ID, and Business Unit. A specific row for 'Jessy' is selected. At the top right of the grid, there are buttons for 'Import Employees', 'Import format' (highlighted), and 'Help'. Below the grid, there's a pagination section showing 'Records per page' set to 20, and 'Page 1 of 2'.

Figure 12

- Click **HR** in the top menu
- Click **Employees** option on the left panel
- 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	Busines	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)

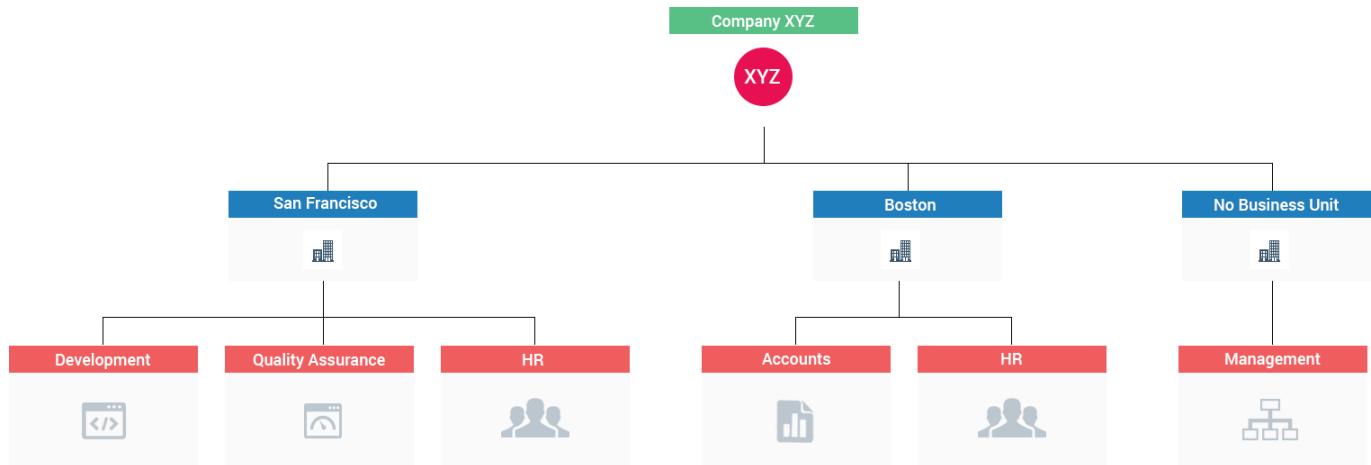
For example: <http://example.com/sentrifugo/index.php/cronjob>



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

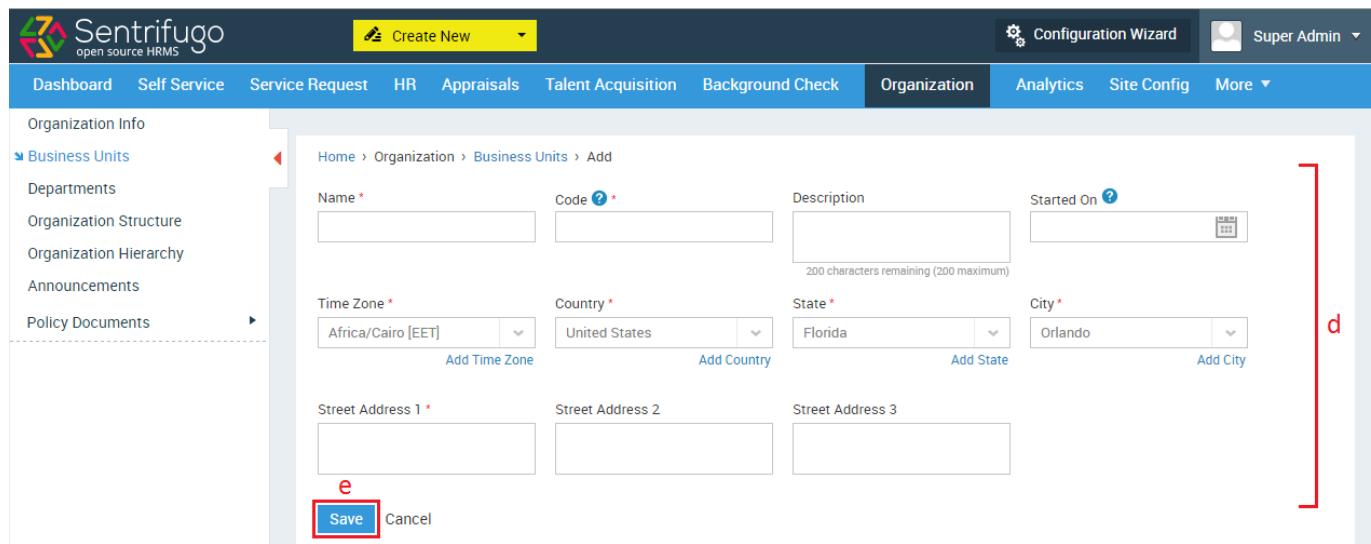
*Please refer Figure 14.*

The screenshot shows the Sentrifugo web interface. The top navigation bar includes 'Create New' (with a dropdown arrow), 'Configuration Wizard', 'Super Admin', and a user profile. The main menu has tabs: Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, **Organization**, Analytics, Site Config, and More. On the left, a sidebar has links: Organization Info, **Business Units** (highlighted with a red box), Departments, Organization Structure, Organization Hierarchy, Announcements, and Policy Documents. The central content area shows the 'Business Units' section under 'Organization'. It has a breadcrumb trail: Home > Organization > Business Units. It includes a 'Pin to shortcuts' link and a '+Add' button. A table lists business units with columns: Action, Name, Code, Started On, Street Address, City, State, Country, and Time zone. Two entries are shown: 'Orange Blossom' (ORB) and 'Avenue' (AVE). At the bottom are 'Records per page' (set to 20) and a 'Search' input field.

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.



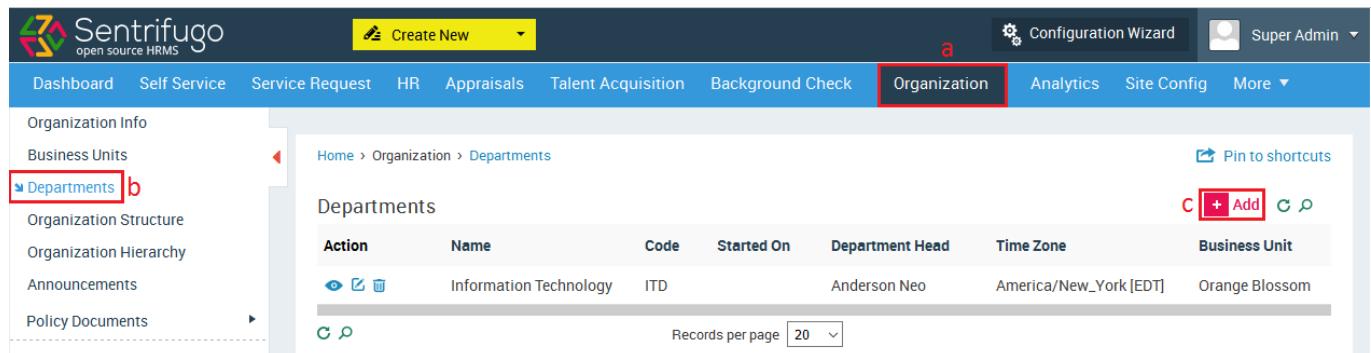
The screenshot shows the 'Organization' tab selected in the top navigation bar. The main content area is titled 'Business Units' and shows a form for adding a new business unit. The form includes fields for Name, Code, Description, Started On, Time Zone, Country, State, City, Street Address 1, Street Address 2, and Street Address 3. A red bracket labeled 'd' points to the right side of the form. A red box labeled 'e' highlights the 'Save' button.

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.

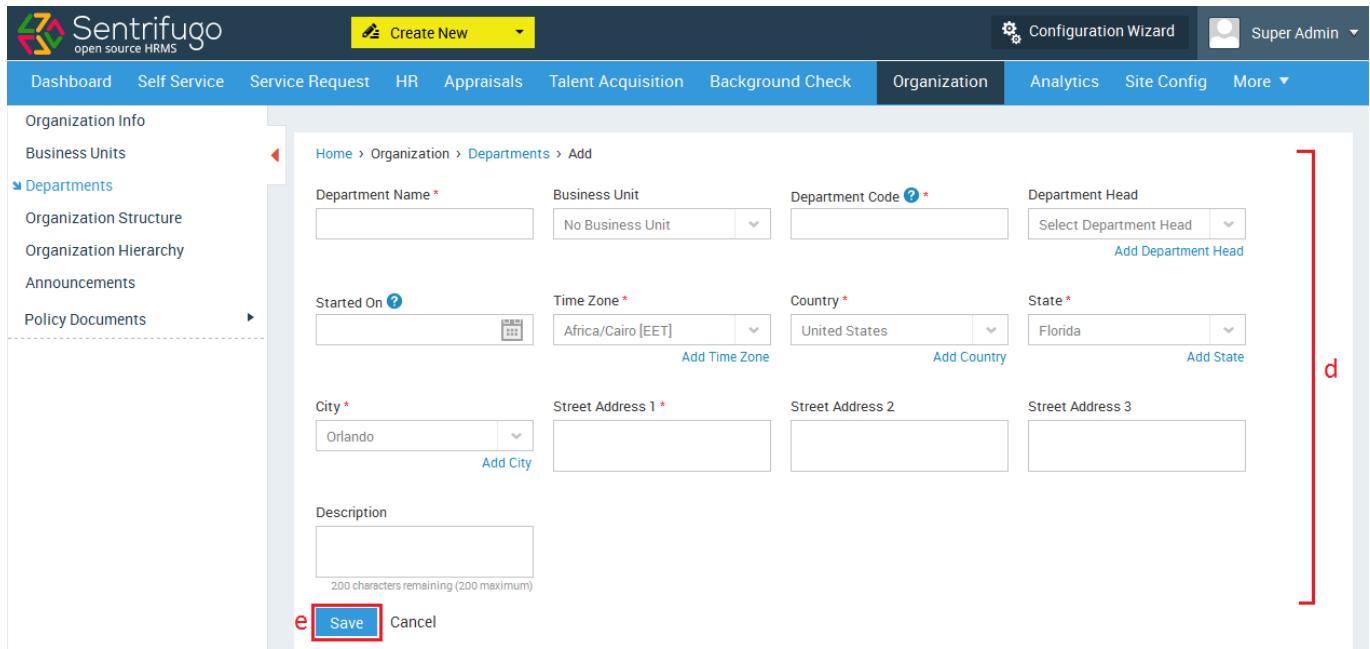


The screenshot shows the 'Organization' tab selected in the top navigation bar. The left menu panel has 'Departments' highlighted with a red box labeled 'b'. The main content area shows a table of departments with columns: Action, Name, Code, Started On, Department Head, Time Zone, and Business Unit. A red box labeled 'c' highlights the '+Add' button.

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.



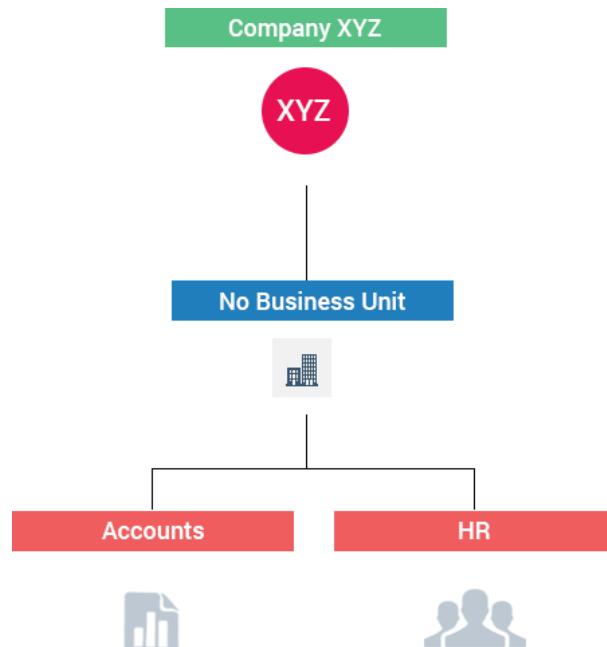
The screenshot shows the 'Organization' tab selected in the top navigation bar. On the left, a sidebar menu includes 'Departments' (which is expanded), 'Organization Structure', 'Organization Hierarchy', 'Announcements', and 'Policy Documents'. The main content area displays a form for adding a department. The 'Business Unit' field is set to 'No Business Unit'. Other fields include 'Department Name', '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. At the bottom are 'Save' and 'Cancel' buttons, with 'Save' being highlighted by a red box.

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.

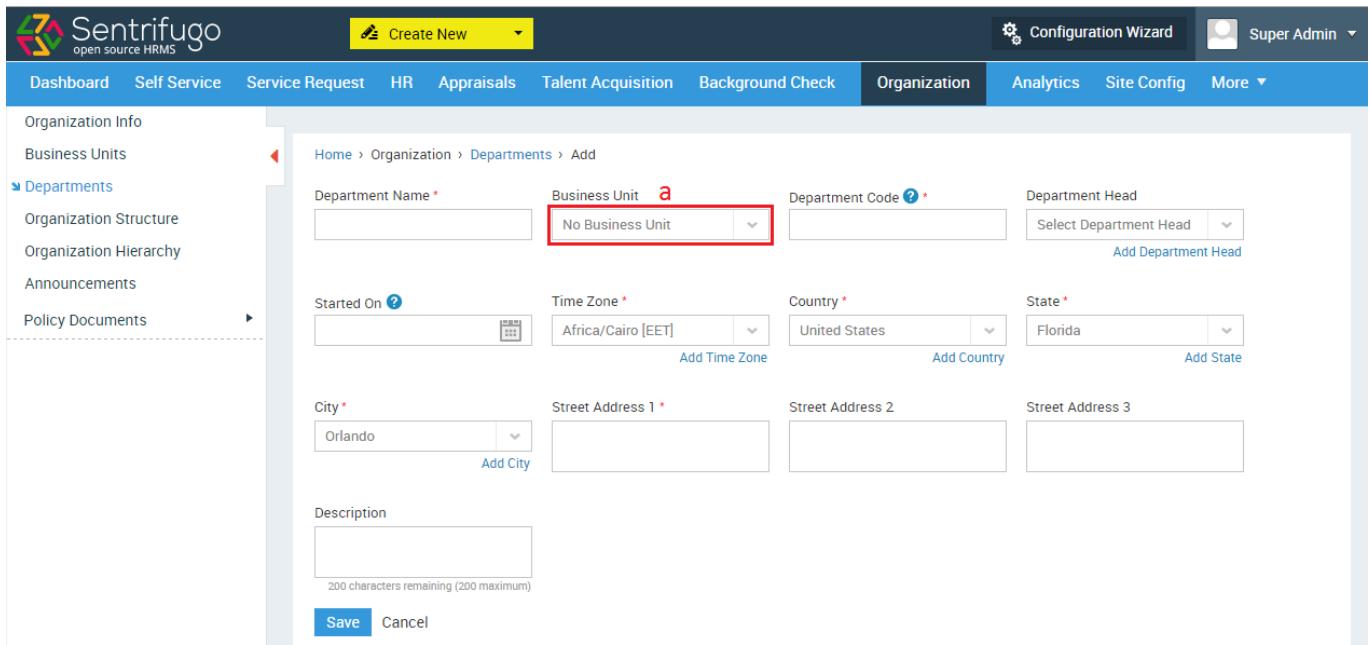


Figure 18

- 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.

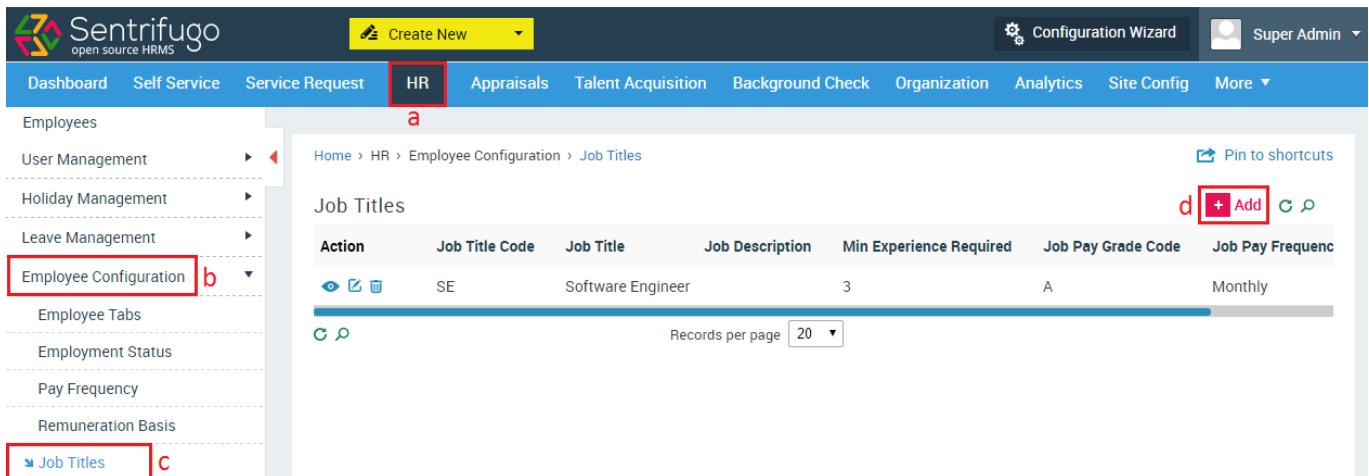
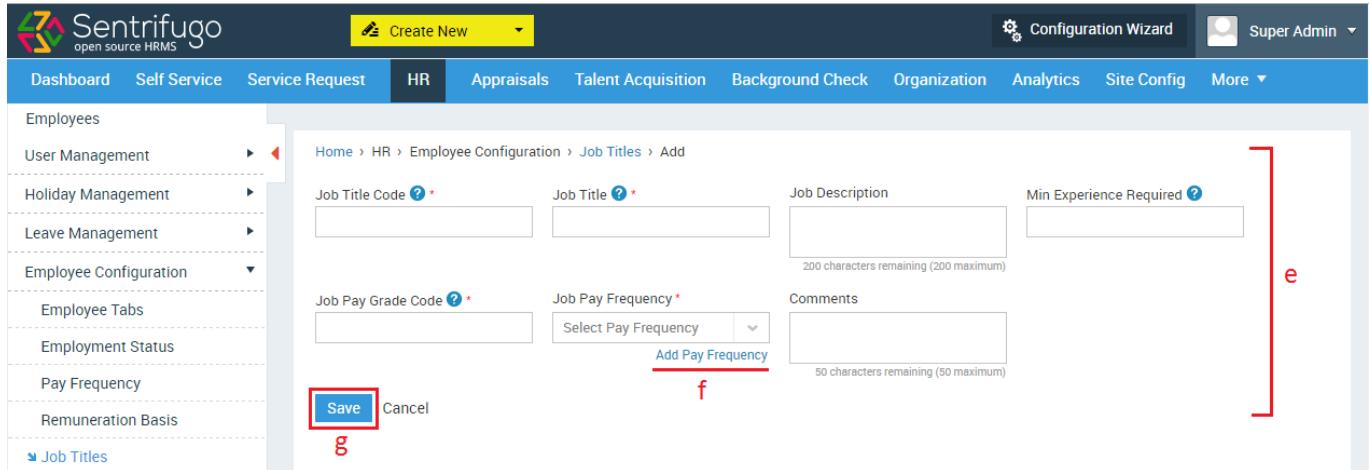


Figure 19

- Click **HR** in the top menu
- Click **Employee Configuration**, it will expand to give more menu items

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

Please refer Figure 20.



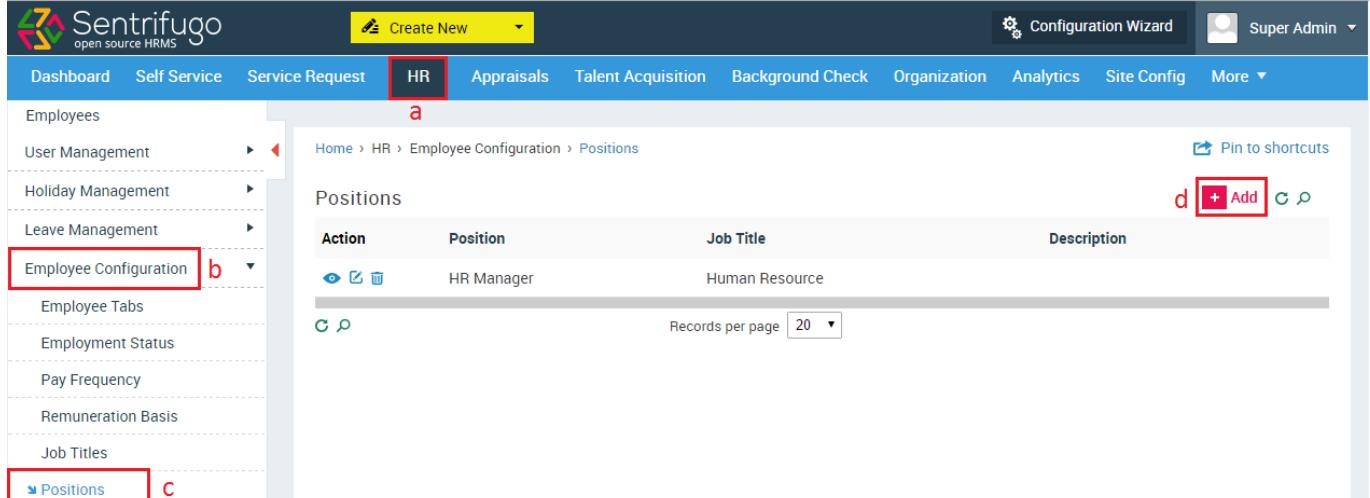
The screenshot shows the 'Job Titles' creation page. It includes fields for Job Title Code, Job Title, Job Description, Min Experience Required, Job Pay Grade Code, Job Pay Frequency, Comments, and a Save button. A red bracket labeled 'e' points to the 'Min Experience Required' field. A red bracket labeled 'f' points to the 'Add Pay Frequency' link. A red box labeled 'g' highlights the 'Save' button.

Figure 20

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

## 1.6.2 Adding Positions

Please refer Figure 21.

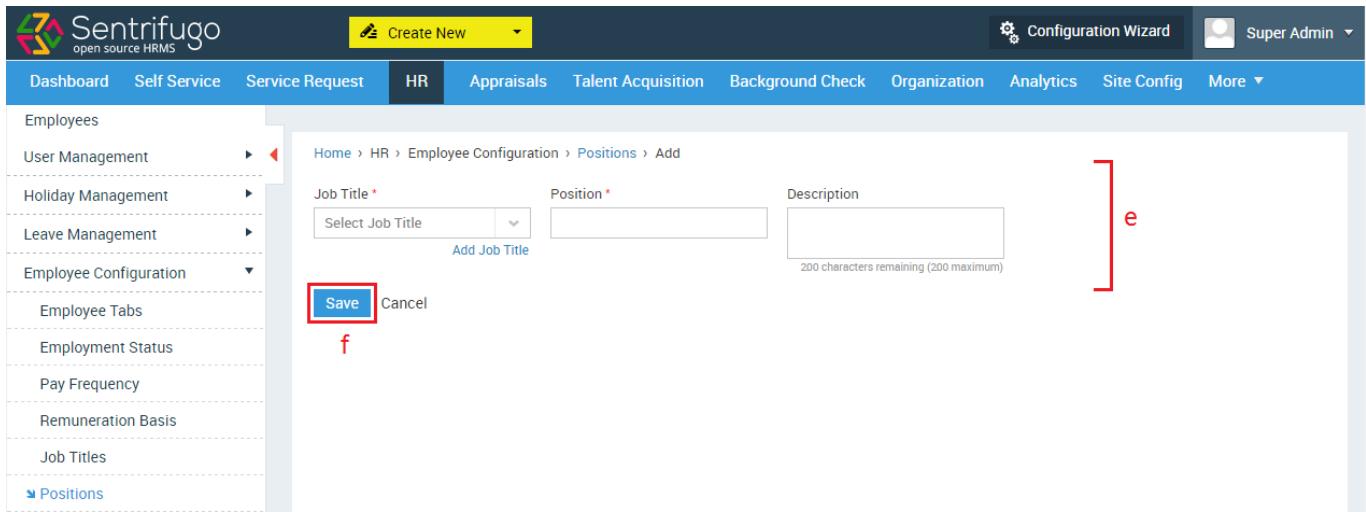


The screenshot shows the 'Positions' list page. It includes a header with 'Action', 'Position', 'Job Title', and 'Description' columns, and a footer with a '+ Add' button. A red box labeled 'b' highlights the 'Employee Configuration' menu item. A red box labeled 'c' highlights the 'Positions' submenu item. A red box labeled 'd' highlights the '+ Add' button.

Figure 21

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

Please refer Figure 22.



The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, More, Configuration Wizard, and Super Admin. On the left, a sidebar under 'Employee Configuration' lists options like User Management, Holiday Management, Leave Management, Employee Tabs, Employment Status, Pay Frequency, Remuneration Basis, Job Titles, and Positions. The main content area shows a 'Create New' dialog for adding a position. It has fields for 'Job Title' (with a dropdown menu and an 'Add Job Title' link), 'Position' (a text input field), and 'Description' (a text area with a character limit of 200). A red bracket on the right side of the screen points to the 'Description' field, labeled 'e'. A red box highlights the 'Save' button at the bottom left of the form, labeled 'f'.

Figure 22

- e. Fill in the required details
- f. 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.*

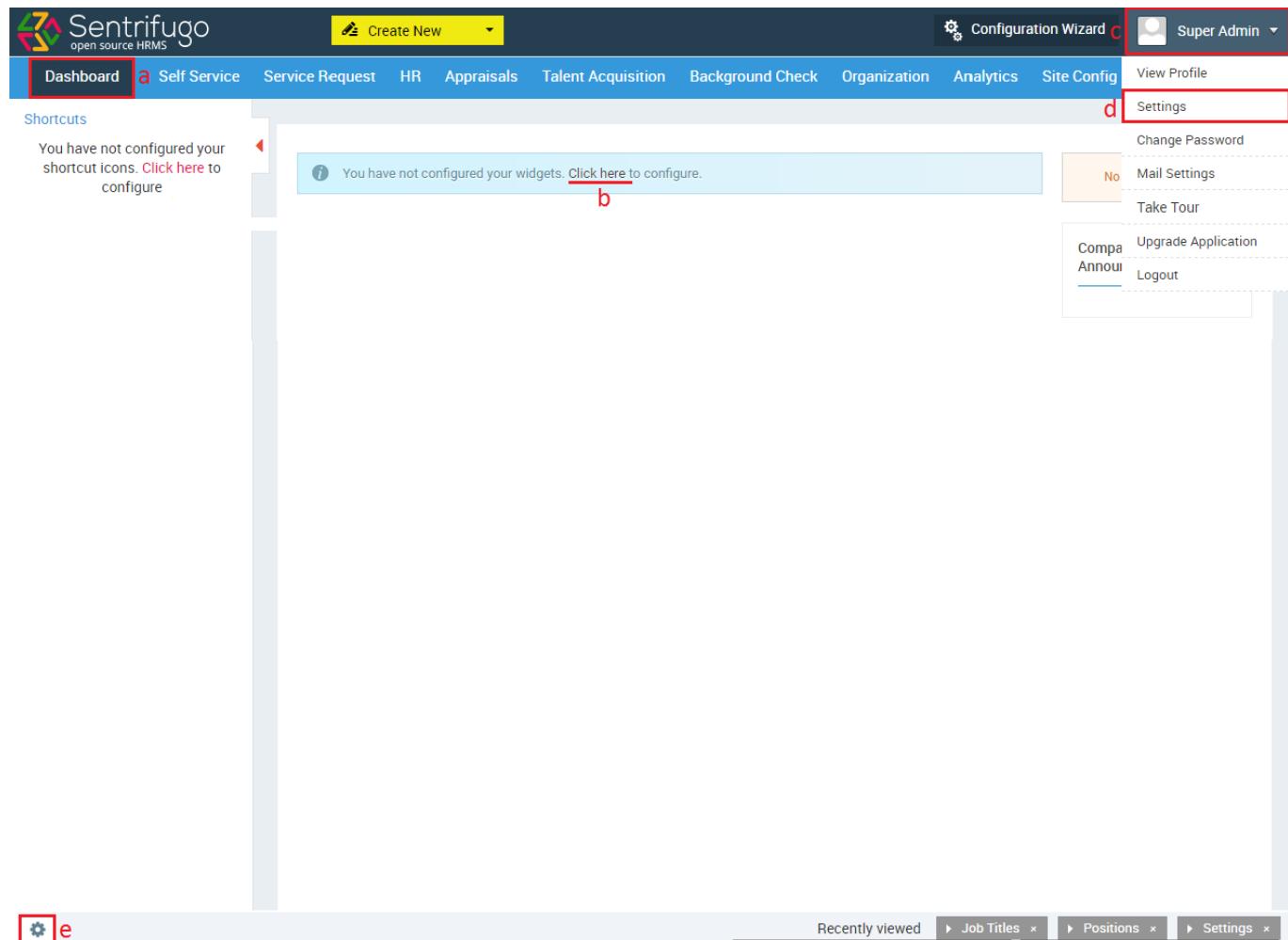


Figure 23

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.

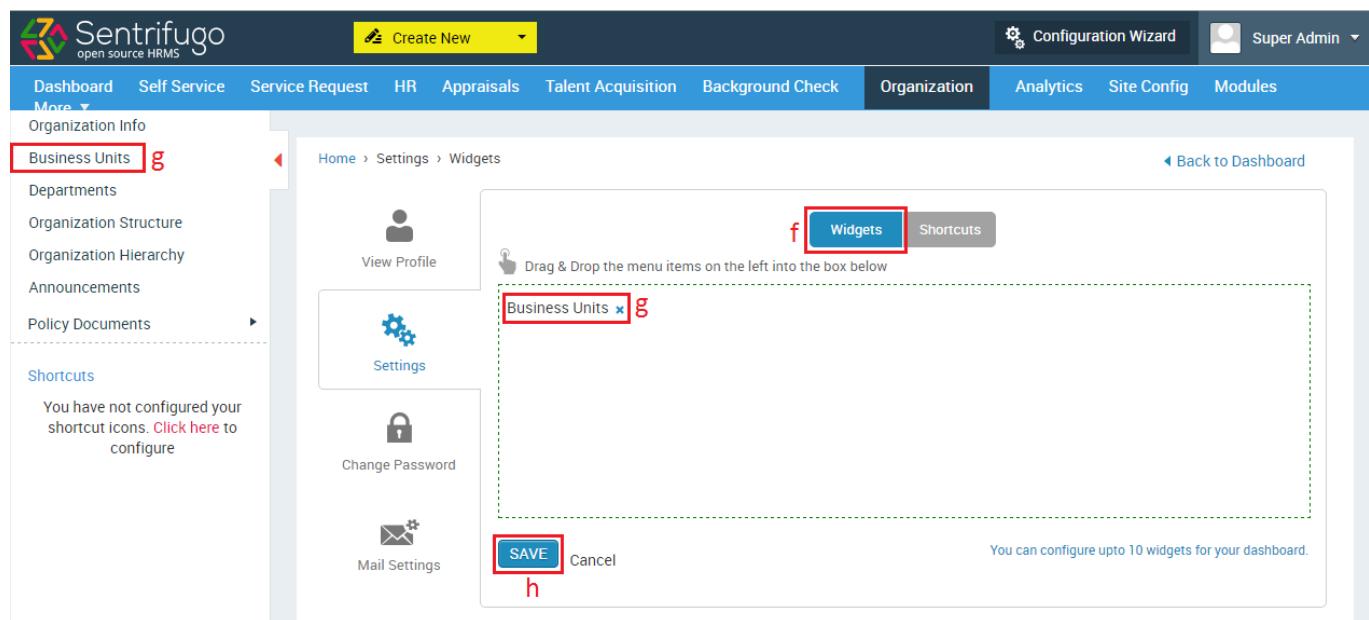


Figure 24

#### (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.

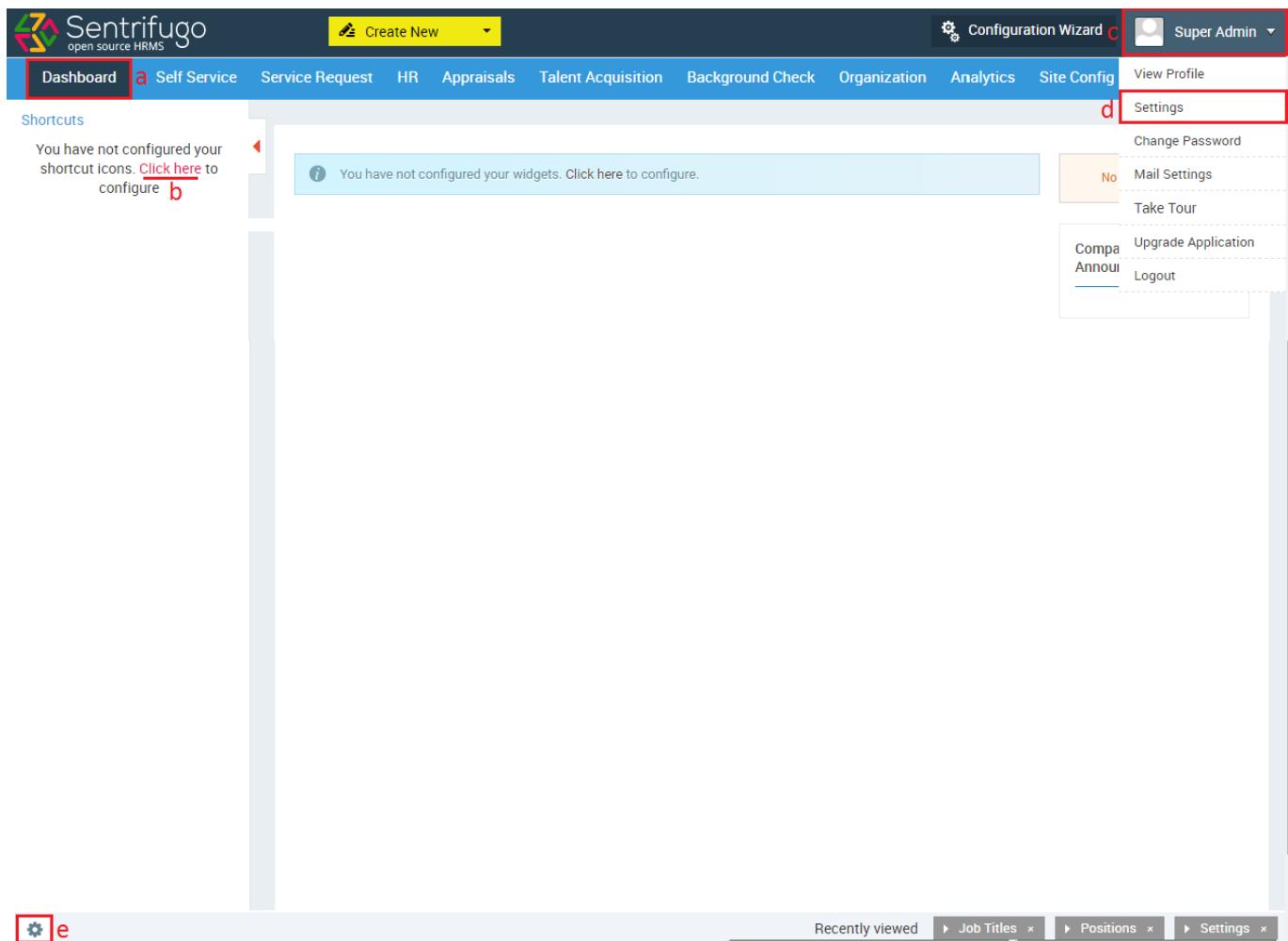


Figure 25

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

- 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**

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

**Or**

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

Please refer Figure 26.

The screenshot shows the 'Shortcuts' configuration page in the Sentrifugo application. The 'Widgets' tab is active. A 'Shortcuts' button is highlighted with a red box 'f'. A 'Business Units' item is selected and highlighted with a red box 'g'. A 'SAVE' button is highlighted with a red box 'h'. A note at the bottom right says 'You can configure upto 16 shortcut icons.'

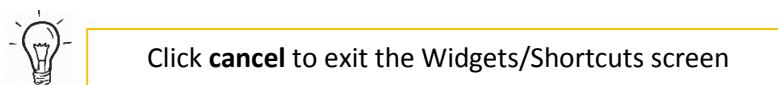
Figure 26

#### (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 Check the image below:

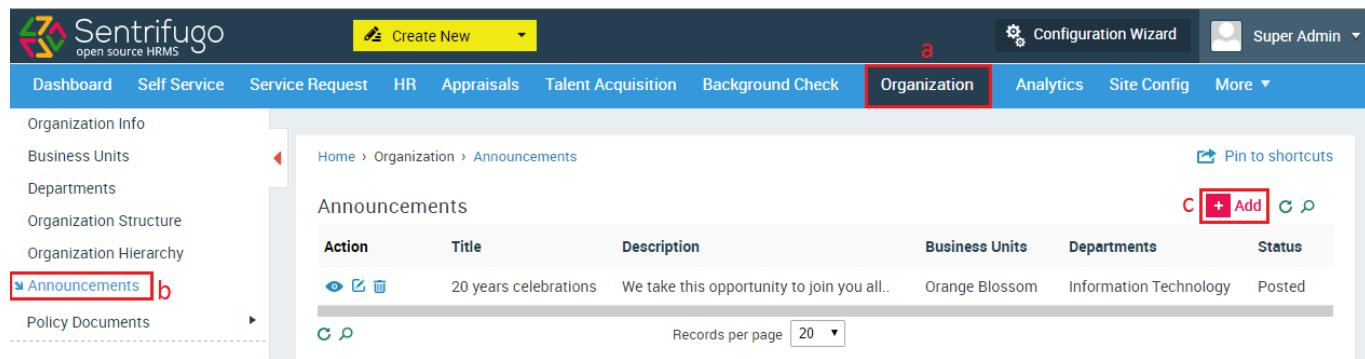
The screenshot shows the Sentrifugo dashboard with various widgets. On the left, there's a grid of icons for different modules. The main area contains five large cards: '4 Openings/Positions' (Approved: 1, Rejected: 1), '2 Screening Types', '2 Agencies', '1 Approved Requisitions', and '1 Manager Appraisal'. To the right, there are two smaller boxes: 'No birthdays today.' and 'Company Announcements' (Announcements Sat, Sep 17).



## 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.

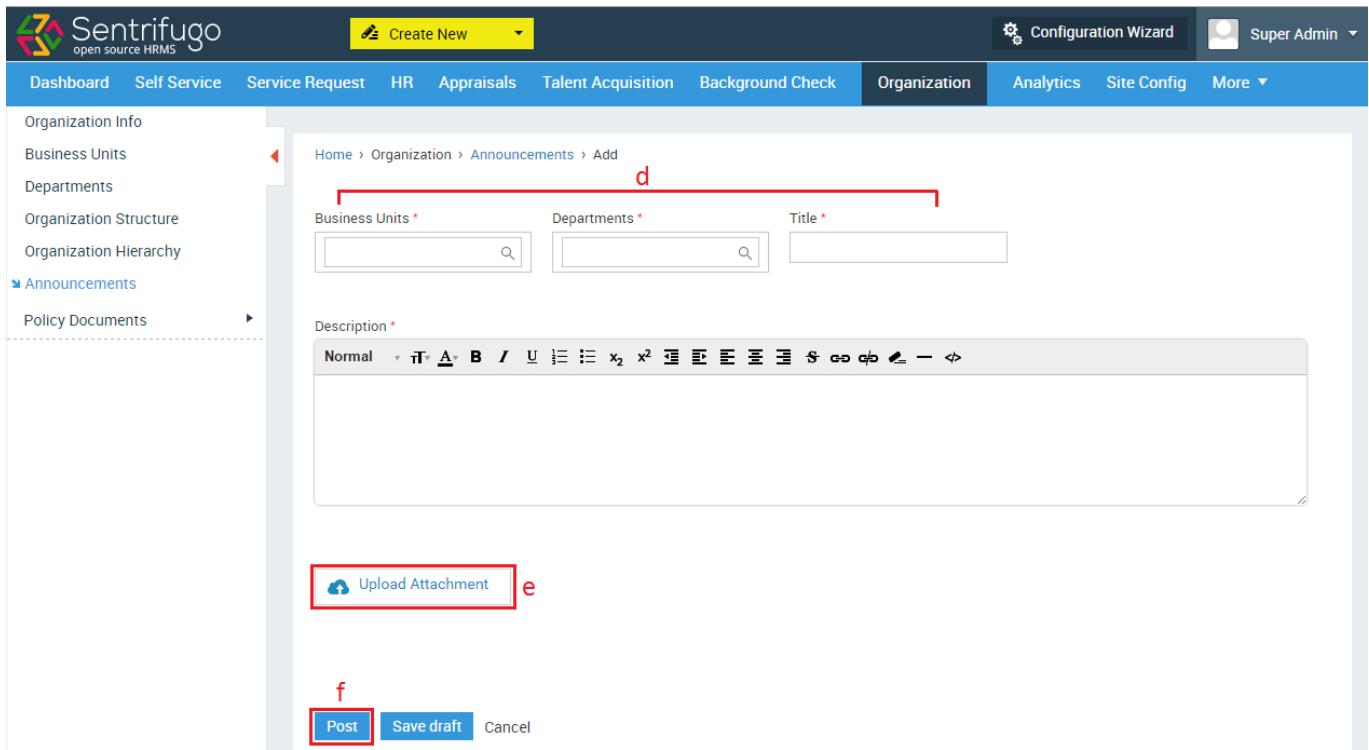


Action	Title	Description	Business Units	Departments	Status
	20 years celebrations	We take this opportunity to join you all..	Orange Blossom	Information Technology	Posted

Figure 27

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

Please refer Figure 28.



The screenshot shows the 'Announcements' section of the Sentrifugo HRMS. 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, Talent Acquisition, Background Check, Organization (selected), Analytics, Site Config, and More. On the left, there's a sidebar with links for Organization Info, Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements (selected), and Policy Documents. The main content area shows a form for adding an announcement. It has fields for 'Business Units \*', 'Departments \*', 'Title \*', and a rich text editor for 'Description \*'. Below the editor is an 'Upload Attachment' button. At the bottom are buttons for 'Post' (highlighted with a red box), 'Save draft', and 'Cancel'.

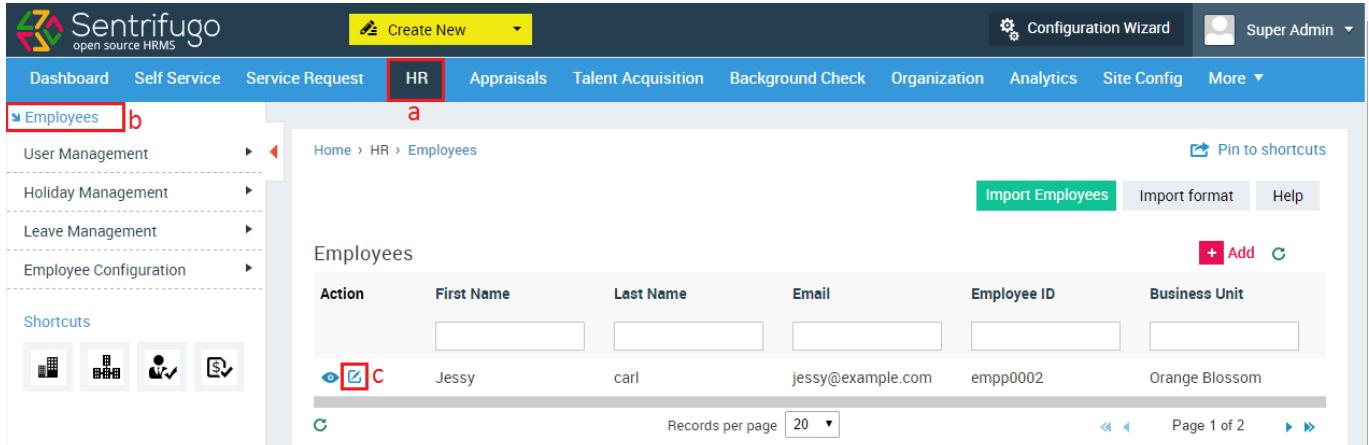
Figure 28

- 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.



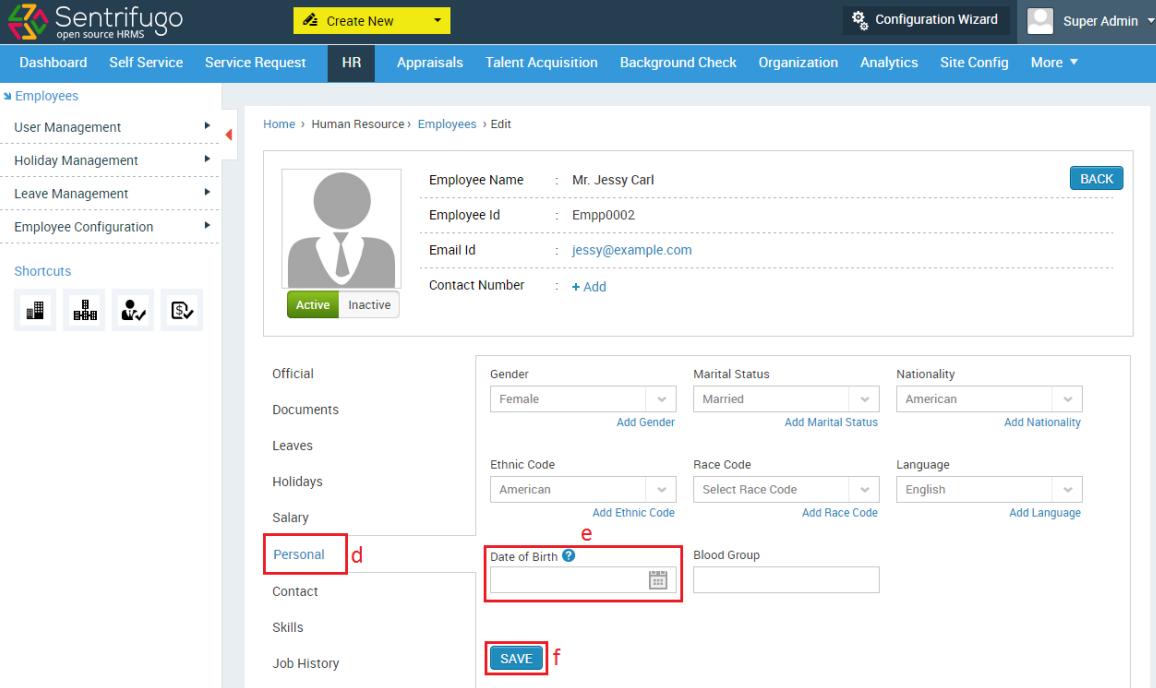
The screenshot shows the 'Employees' section under the HR module. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has tabs for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left, there's a sidebar with links for Employees (selected), User Management, Holiday Management, Leave Management, Employee Configuration, and Shortcuts. The main content area shows a table of employees. The first row shows columns for Action, First Name, Last Name, Email, Employee ID, and Business Unit. An employee named 'Jessy' is listed with the details: First Name (Jessy), Last Name (carl), Email (jessy@example.com), Employee ID (empp0002), and Business Unit (Orange Blossom). A checkbox next to the first name is checked. There are buttons for '+ Add' and 'Import Employees'. At the bottom are buttons for 'Records per page' (set to 20) and 'Page 1 of 2'.

Figure 29

To add an employee's birthday:

- a. Click **HR** in the top menu
- b. Click **Employees** on the left menu panel
- c. Click **Edit** icon against any employee's name

*Please refer Figure 30.*



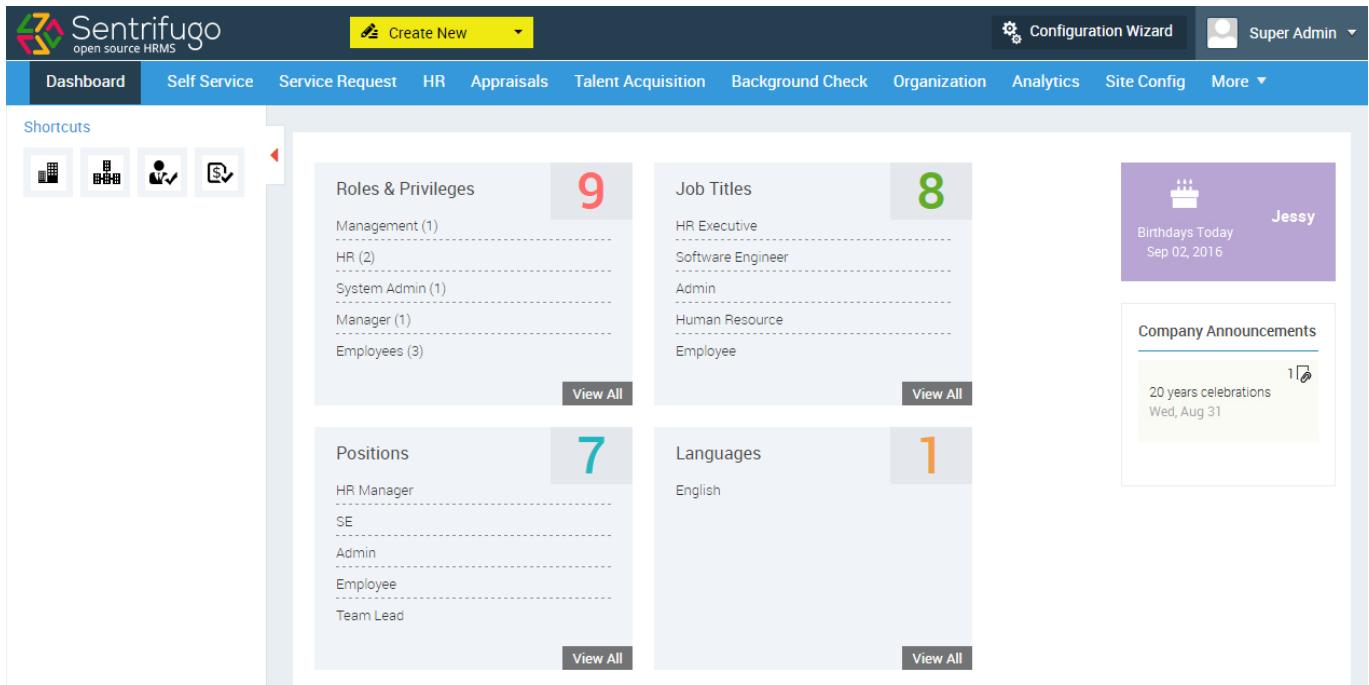
The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has 'Dashboard', 'Self Service', 'Service Request', 'HR' (selected), 'Appraisals', 'Talent Acquisition', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. On the left, a sidebar for 'Employees' lists 'User Management', 'Holiday Management', 'Leave Management', and 'Employee Configuration'. Below this are 'Shortcuts' with icons for Home, Employees, Holidays, and Contact. The main content area shows an employee profile for 'Mr. Jessy Carl' with fields for Employee Name, Employee Id, Email Id, and Contact Number. Below this are sections for 'Official', 'Documents', 'Leaves', 'Holidays', 'Salary', and 'Personal'. The 'Personal' section is highlighted with a red box and labeled 'd'. It contains fields for Gender (Female), Marital Status (Married), Nationality (American), Ethnic Code (American), Race Code (Select Race Code), Language (English), Date of Birth (with a calendar icon), and Blood Group. The 'Date of Birth' field is highlighted with a red box and labeled 'e'. At the bottom right of the form is a blue 'SAVE' button, which is also highlighted with a red box and labeled 'f'.

Figure 30

- d. Click **Personal** menu option on the left menu panel (left side of the form)
- e. Enter the birth date in the 'Date of Birth' field
- f. 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, Talent Acquisition, 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 four icons: a document, a person, a user, and a search. The main content area displays several cards with employee statistics:

- Roles & Privileges**: 9 items (Management 1, HR 2, System Admin 1, Manager 1, Employees 3). [View All](#)
- Job Titles**: 8 items (HR Executive, Software Engineer, Admin, Human Resource, Employee). [View All](#)
- Positions**: 7 items (HR Manager, SE, Admin, Employee, Team Lead). [View All](#)
- Languages**: 1 item (English). [View All](#)
- Birthdays Today**: Jessy (Sep 02, 2016). [View All](#)
- Company Announcements**: 1 item (20 years celebrations Wed, Aug 31). [View All](#)

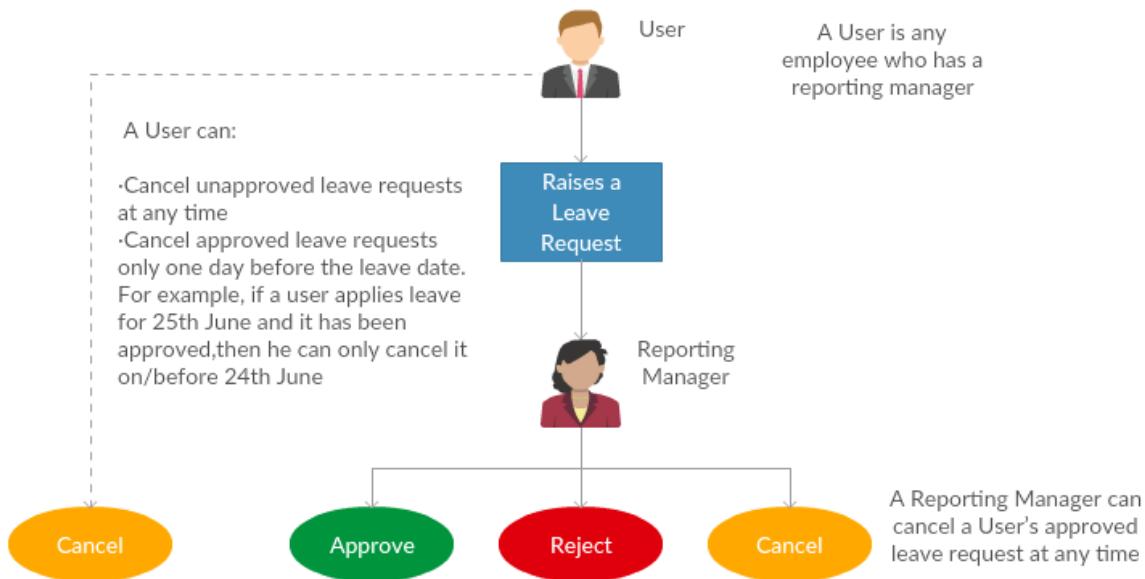
Figure 31



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. Below is the leave management process flowchart.



#### Process Description:

- A User (Any User who has a reporting manager) raises a leave request.
- The Reporting Manager, HR and the User will receive an email notification.
- The User can cancel his leave request unapproved or approved (one day before the leave date)
- The Reporting Manager can approve/reject/cancel (at any time) the leave request.
- Once the action has been taken by the Reporting Manager, HR and the User will receive an email notification.



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.

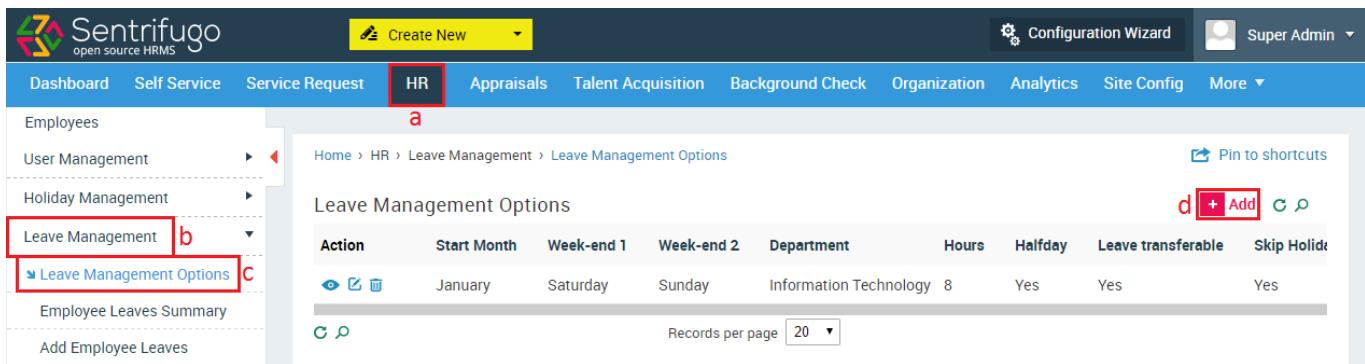


Figure 32

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.

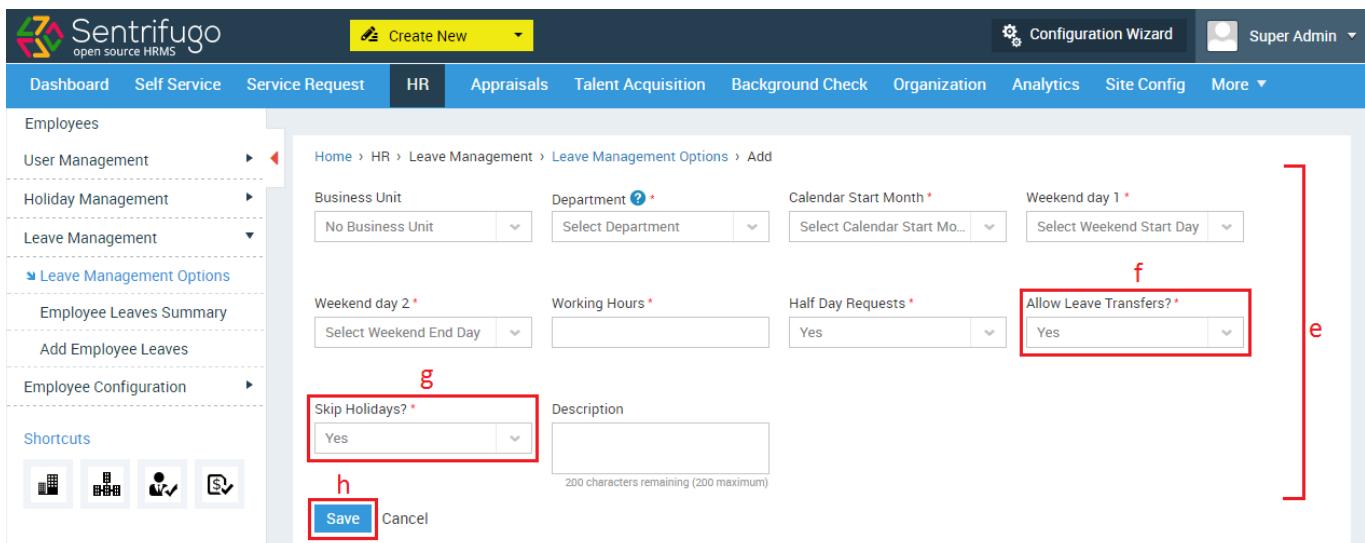


Figure 33

- Fill in the required details
- 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.
- Skip Holidays:** If a user applies for a vacation which includes the weekend or any pre-declared holiday, then by using this option, those days will be excluded from the vacation days.
- 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?

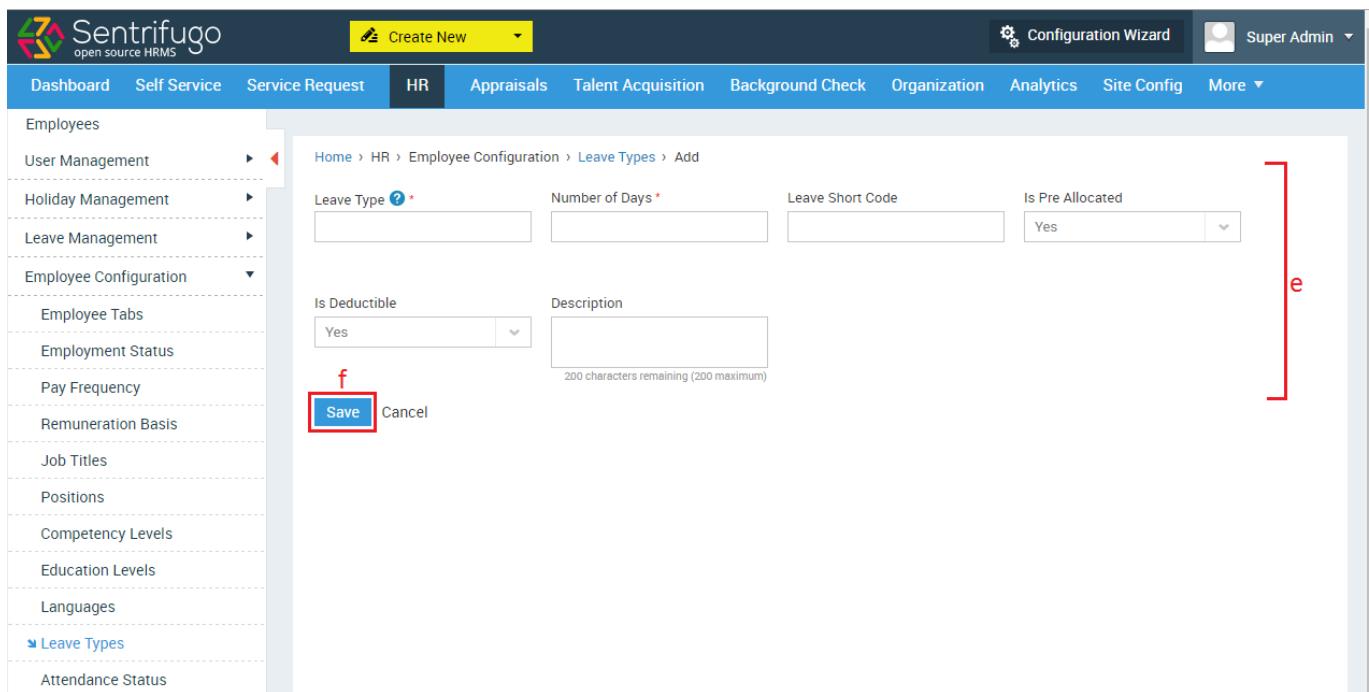
Please refer Figure 34.

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

Figure 34

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

Please refer Figure 35.



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has categories like Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar under 'Employee Configuration' lists options such as User Management, Holiday Management, Leave Management, Employee Tabs, Employment Status, Pay Frequency, Remuneration Basis, Job Titles, Positions, Competency Levels, Education Levels, Languages, and Leave Types (which is currently selected). The main content area shows a form for adding a new leave type, with fields for 'Leave Type', 'Number of Days', 'Leave Short Code', 'Is Pre Allocated' (set to 'Yes'), 'Is Deductible' (set to 'Yes'), and a 'Description' text area. A red bracket labeled 'e' covers the 'Is Pre Allocated' and 'Is Deductible' fields. A red box labeled 'f' covers the 'Save' button.

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

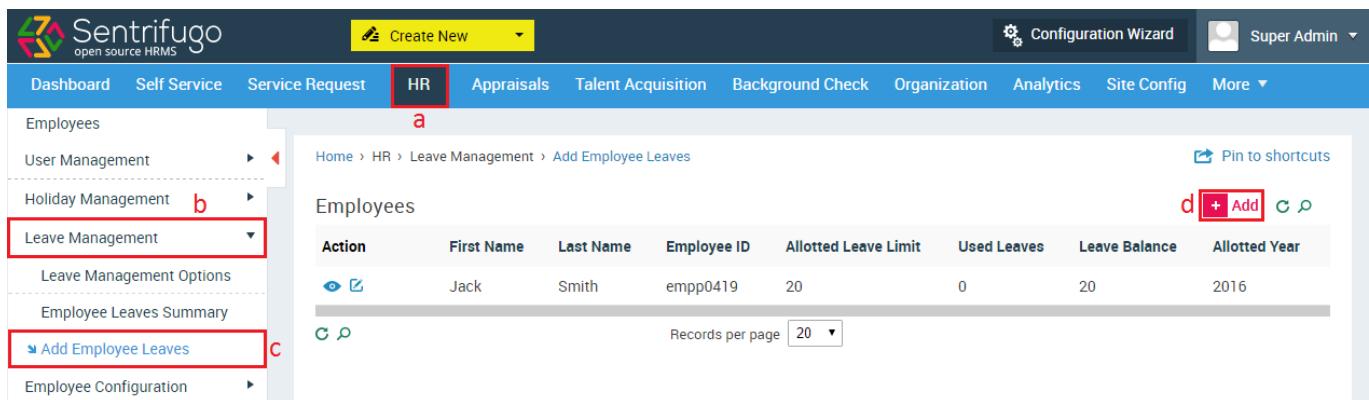


Figure 36

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

Please refer Figure 37

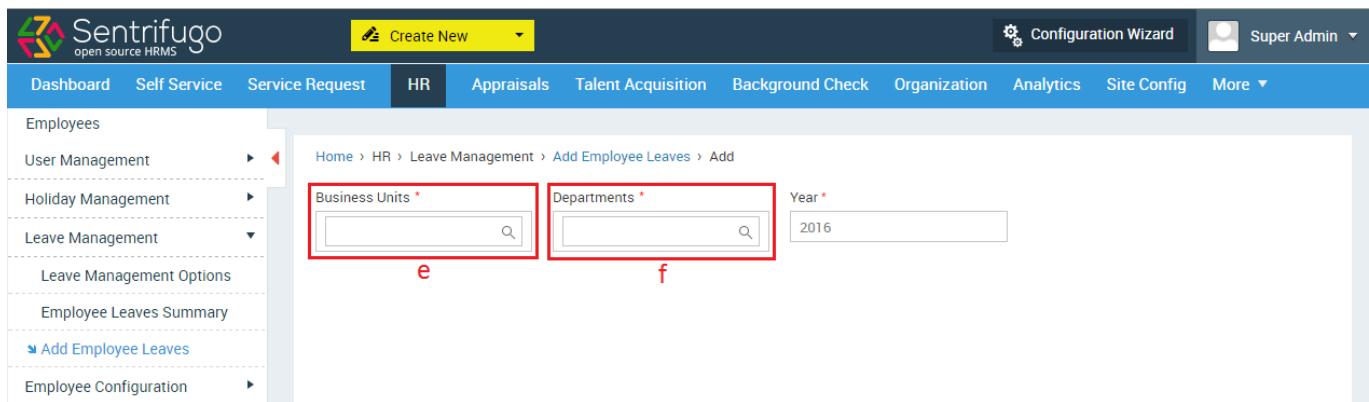
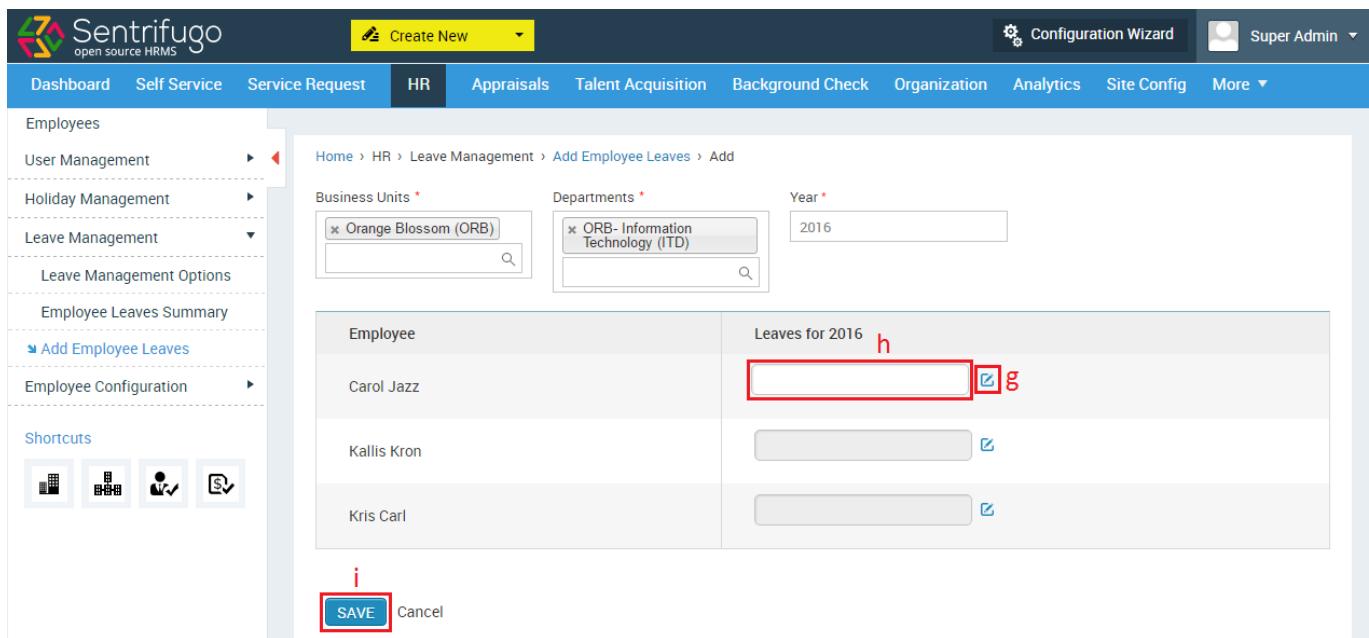


Figure 37

- Select the Business Unit(s)
- Select the Department(s)

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

Please refer Figure 38



Home > HR > Leave Management > Add Employee Leaves > Add

Employee	Leaves for 2016
Carol Jazz	<input type="text"/>
Kallis Kron	<input type="text"/>
Kris Carl	<input type="text"/>

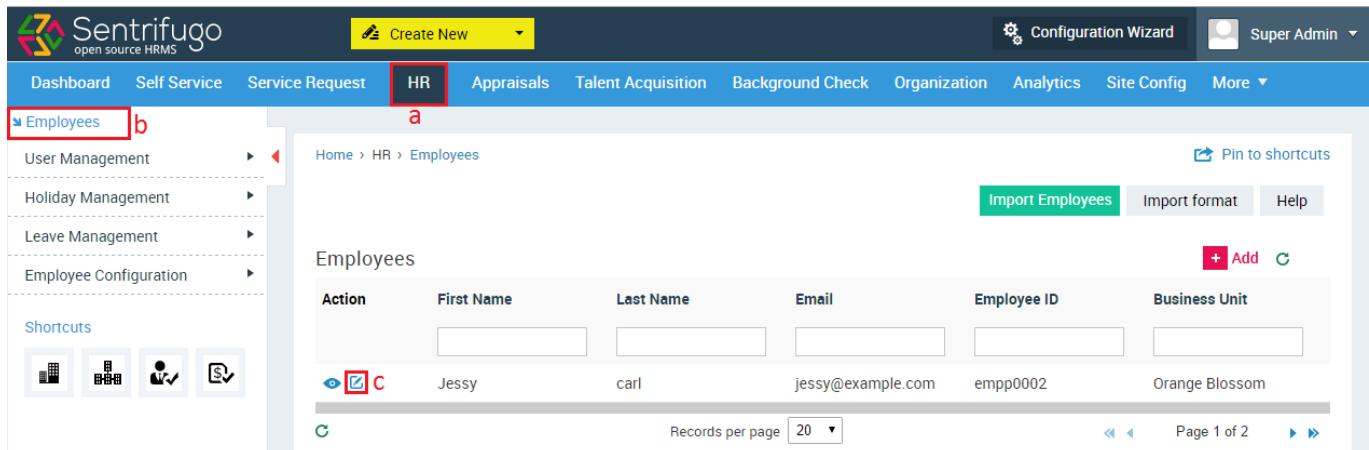
**SAVE** Cancel

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



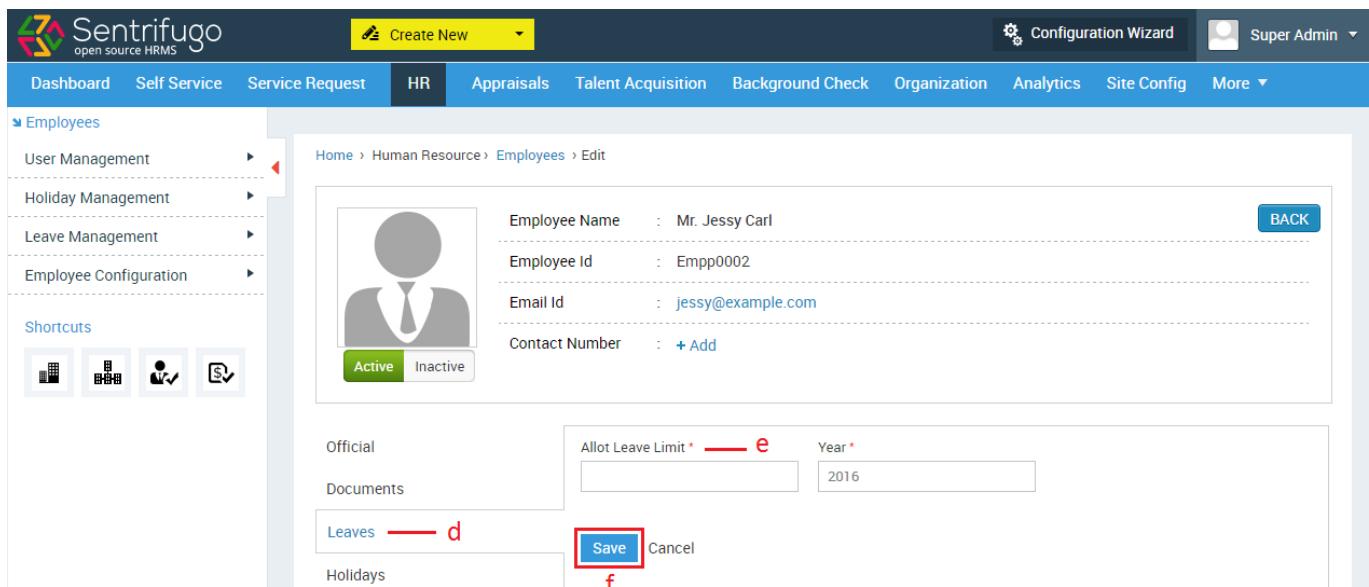
Action	First Name	Last Name	Email	Employee ID	Business Unit
	Jessy	carl	jessy@example.com	empp0002	Orange Blossom

Records per page: 20 | Page 1 of 2

Figure 39

- a. Click **HR** in the top menu
- b. Click **Employees** on the left menu panel
- c. Click **Edit** icon against any employee name

Please refer Figure 40



The screenshot shows the 'Employees' section of the Sentrifugo HRM system. The top navigation bar includes 'Create New', 'Configuration Wizard', 'Super Admin', and other menu items. The left sidebar has sections for User Management, Holiday Management, Leave Management, Employee Configuration, and Shortcuts. The main content area shows an employee profile for 'Mr. Jessy Carl' with fields for Employee Name, Employee Id, Email Id, and Contact Number. Below this, there are tabs for Official, Documents, Leaves (which is highlighted with a red box 'd'), and Holidays. A 'Save' button is highlighted with a red box 'f'. A 'BACK' button is also present.

Figure 40

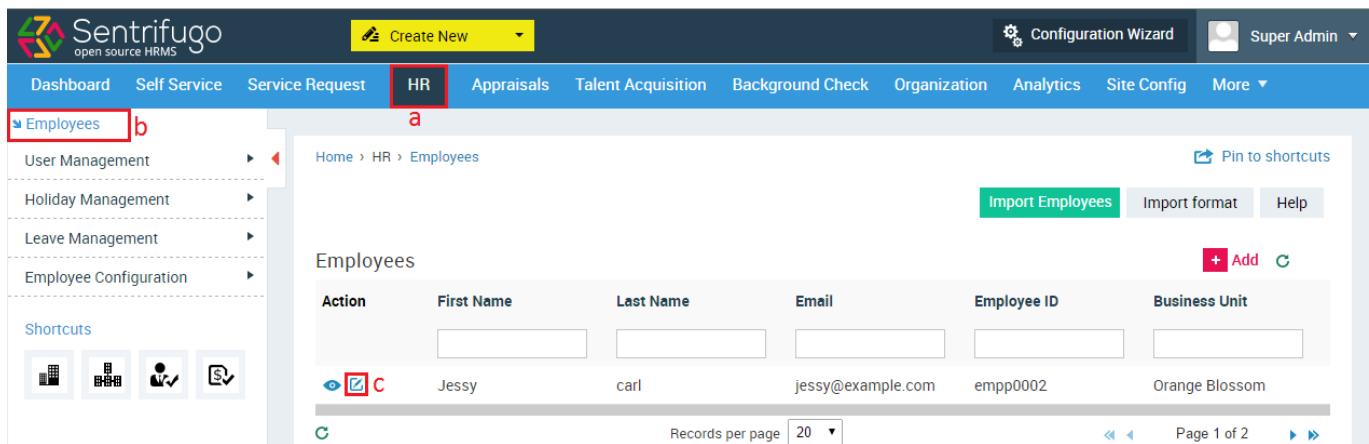
- d. Click **Leaves** on the left menu panel (left side of the form)
- e. Enter the number of days for this employee
- f. Click **SAVE** button



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 'Employees' list page under the 'HR' menu. The top navigation bar includes 'Create New', 'Configuration Wizard', 'Super Admin', and other menu items. The left sidebar has sections for User Management, Holiday Management, Leave Management, Employee Configuration, and Shortcuts. The main content area shows a table of employees with columns for Action, First Name, Last Name, Email, Employee ID, and Business Unit. One row is selected for 'Jessy' with values: First Name: Jessy, Last Name: carl, Email: jessy@example.com, Employee ID: empp0002, and Business Unit: Orange Blossom. An 'Edit' icon is highlighted with a red box 'c'.

Figure 41

- a. Click **HR** in the top menu
- b. Click **Employees** on the left menu panel
- c. Click **Edit** icon against any employee name

*Please refer Figure 42*

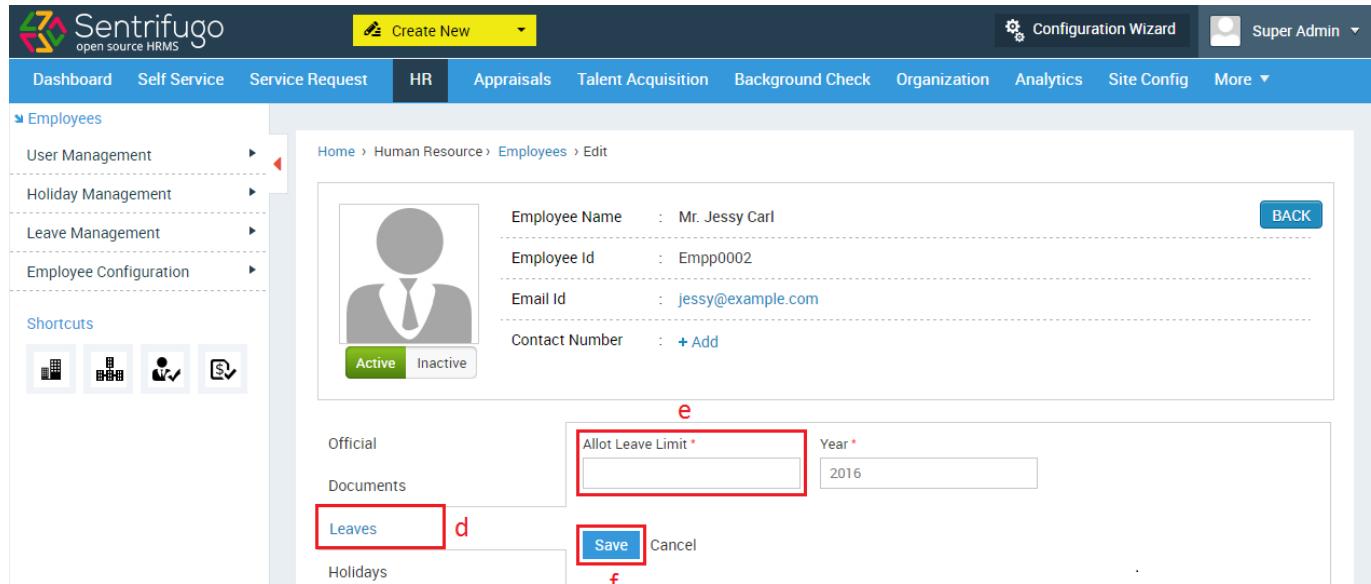


Figure 42

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



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

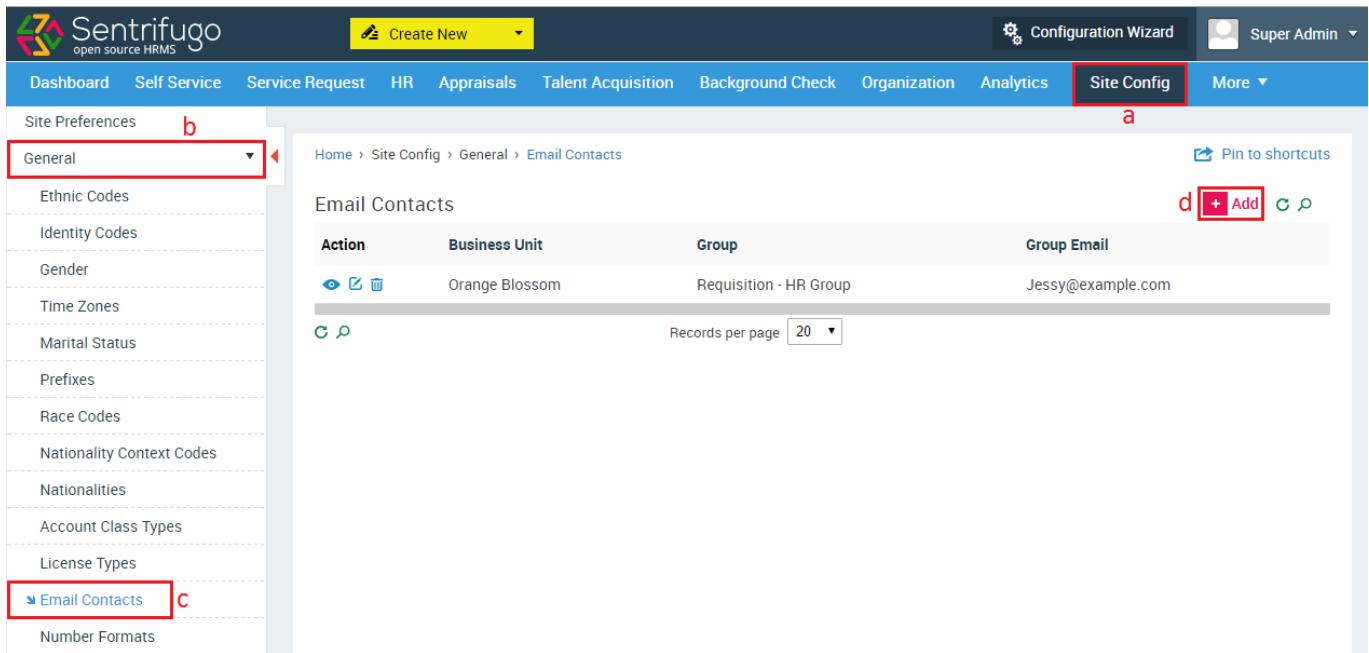
### 3.5 How do I create HR Email Group for Leave Management?

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*

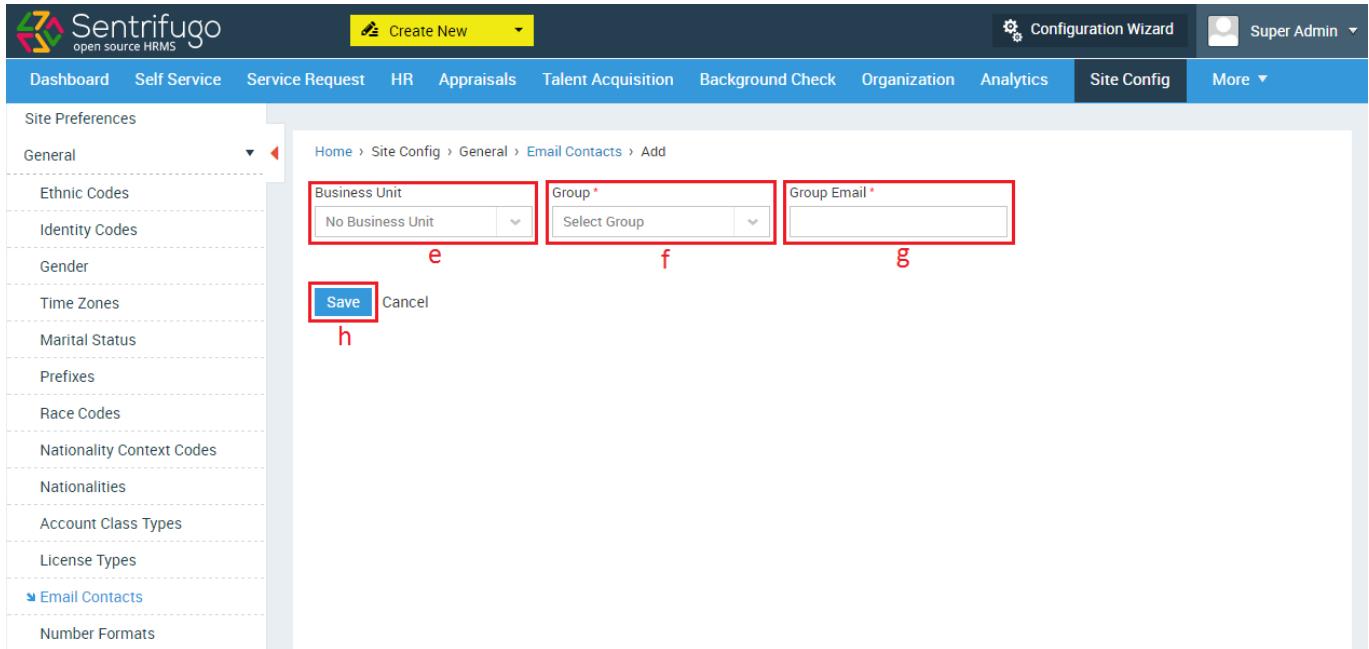


The screenshot shows the Sentrifugo application interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config (which is highlighted with a red box), and More. On the far right, there are Configuration Wizard, Super Admin, and Pin to shortcuts options. Below the navigation bar is a left sidebar with a tree view of Site Preferences categories: 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, Email Contacts (selected and highlighted with a red box), and Number Formats. The main content area displays the 'Email Contacts' configuration page under 'Site Config > General > Email Contacts'. It includes a table with columns for Action, Business Unit, Group, and Group Email. A single row is shown: Action (Edit icon), Business Unit (Orange Blossom), Group (Requisition - HR Group), and Group Email (Jessy@example.com). Below the table are 'Pin to shortcuts' and '+ Add' buttons. At the bottom, there are search and refresh icons, and a 'Records per page' dropdown set to 20.

Figure 43

- Click **Site Config** on the top menu
- Click **General** on the left menu panel
- Click **Email Contacts** in the submenu
- Click **+Add** button

Please refer Figure 44



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, Talent Acquisition, Background Check, Organization, Analytics, Site Config (highlighted with a blue box), and More. On the far right, there are Configuration Wizard, Super Admin, and Pin to shortcuts options. Below the navigation bar is a left sidebar with a tree view of Site Preferences categories: General (selected and highlighted with a blue box), Ethnic Codes, Identity Codes, Gender, Time Zones, Marital Status, Prefixes, Race Codes, Nationality Context Codes, Nationalities, Account Class Types, License Types, Email Contacts (selected and highlighted with a blue box), and Number Formats. The main content area displays the 'Email Contacts' configuration page under 'Site Config > General > Email Contacts > Add'. It includes a form with fields for Business Unit (No Business Unit), Group (Select Group), and Group Email. Below the form are Save and Cancel buttons. The fields are labeled e, f, and g respectively, and the buttons are labeled h.

Figure 44

- Select the Business Unit
- 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

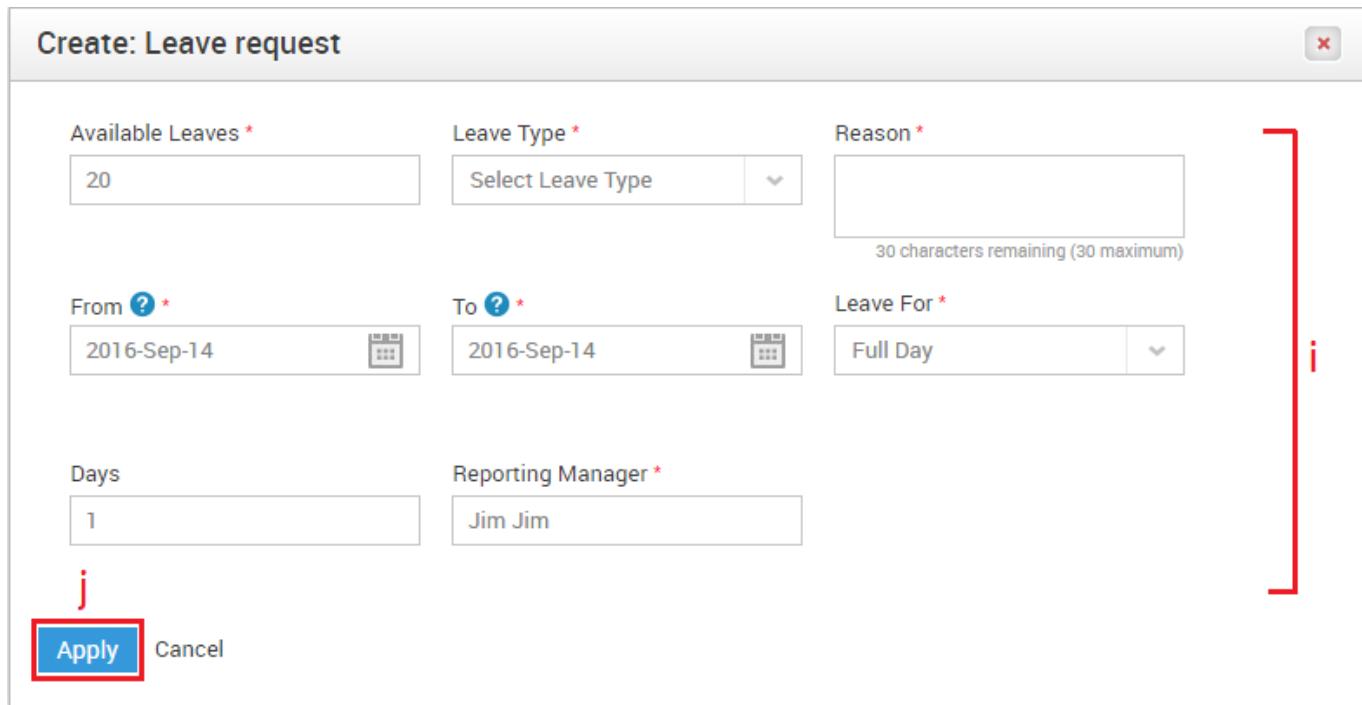
The screenshot shows the Sentrifugo Self Service interface. The top navigation bar includes 'Create New', 'Dashboard', 'Self Service' (highlighted with a red box), 'Service Request', 'HR', 'Appraisals', 'Talent Acquisition', 'Organization', 'Expenses', and 'Time'. The left sidebar has links for 'Leaves' (b), 'Leave Request' (c), 'My Leaves', 'Manager Employee Leaves', 'My Details', 'My Holiday Calendar', 'My Team', and 'Shortcuts' (with a note about configuring icons). The main area shows a calendar for September 2016. A tooltip 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 contains 'ME'. The 'Apply Leave' button is highlighted with a red box. A red box highlights the entire calendar grid. Specific days are labeled: 'a' is the logo, 'b' is the Leaves link, 'c' is the Leave Request link, 'd' is the month header, 'e' is the date navigation buttons, 'f' is the Apply Leave button, 'g' is a single day selected with a red box, and 'h' is a horizontal double-headed arrow indicating a range of dates.

Figure 45

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

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

*Please refer Figure 46*



**Create: Leave request**

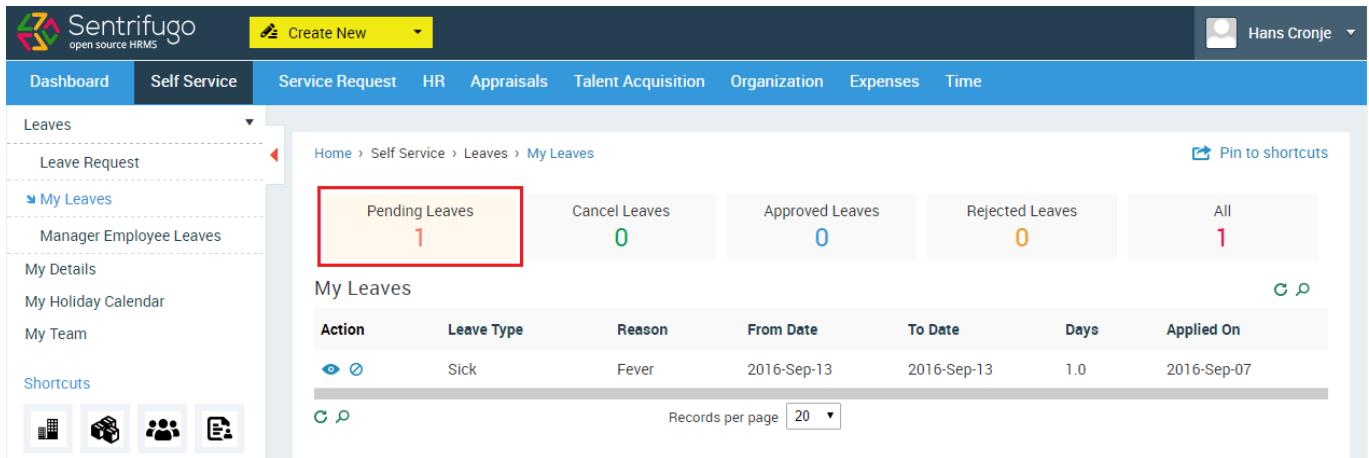
Available Leaves *	Leave Type *	Reason *
20	Select Leave Type	30 characters remaining (30 maximum)
From ? *	To ? *	Leave For *
2016-Sep-14	2016-Sep-14	Full Day
Days	Reporting Manager *	
1	Jim Jim	
<input type="button" value="Apply"/> <input type="button" value="Cancel"/>		

Figure 46

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

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

*Please refer Figure 47*



The screenshot shows the Sentrifugo Self Service interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. The left sidebar has a 'Leaves' category with sub-links: Leave Request, My Leaves, Manager Employee Leaves, My Details, My Holiday Calendar, My Team, and Shortcuts. The main content area displays a summary of leave status: Pending Leaves (1), Cancel Leaves (0), Approved Leaves (0), Rejected Leaves (0), and All (1). Below this is a table titled 'My Leaves' with columns for Action, Leave Type, Reason, From Date, To Date, Days, and Applied On. One row is shown: Action (eye icon with a cancel symbol), 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, there are 'Records per page' dropdown set to 20 and a 'Pin to shortcuts' link.

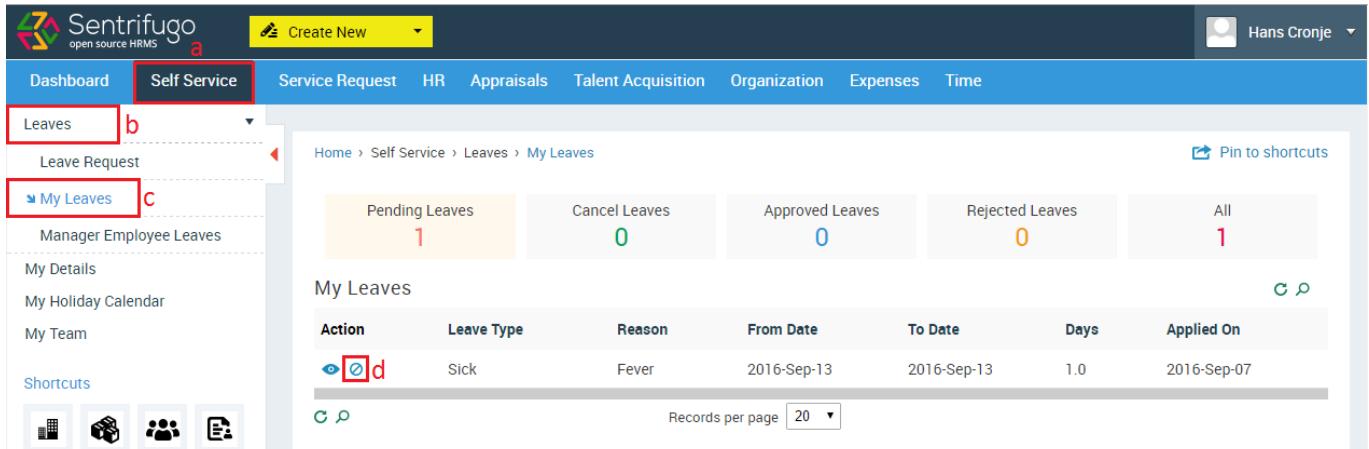
Figure 47

### 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



This screenshot is identical to Figure 47, but with red numbers overlaid to indicate steps: 'a' points to the 'Self Service' button in the top menu; 'b' points to the 'Leaves' link in the left sidebar; 'c' points to the 'My Leaves' link in the 'Leaves' submenu; and 'd' points to the 'Cancel' icon (a red eye icon with a cancel symbol) in the 'Action' column of the 'My Leaves' table.

Figure 48

- Click **Self Service** in the top menu bar
- Click **Leaves** on the left side panel
- Click **My Leaves** in the submenu
- Click **Cancel** icon in the Action column

A confirmation message will be displayed

Please refer Figure 49

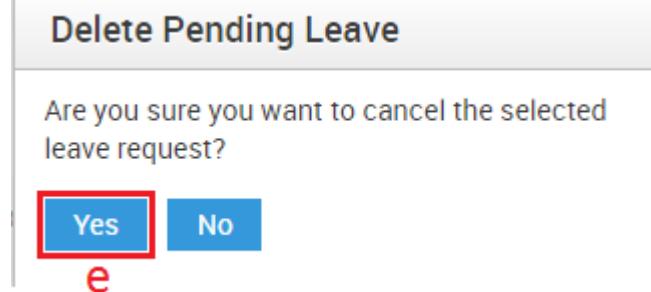


Figure 49

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

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

### Manager

Please refer Figure 50

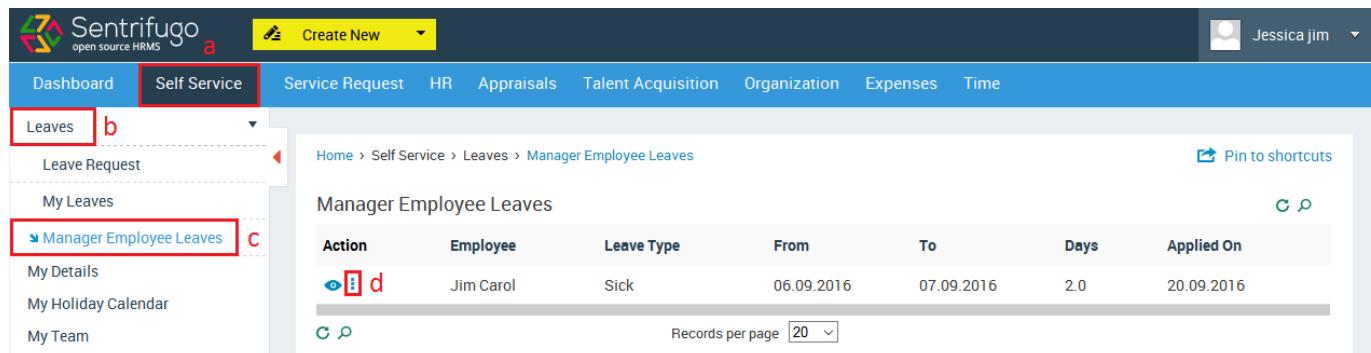


Figure 50

- Click **Self Service** in the top menu bar
- Click **Manage Employee Leaves** on the left side panel
- The leave requests by employees will be displayed in a grid
- Click **More Action** button in the Action column

A small pop up window will open. Please refer Figure 51

**Leaverequest**

Status	e <input type="button" value="Cancel"/>	Comments	
50 characters remaining (50 maximum)			
<b>SAVE</b> f			
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	

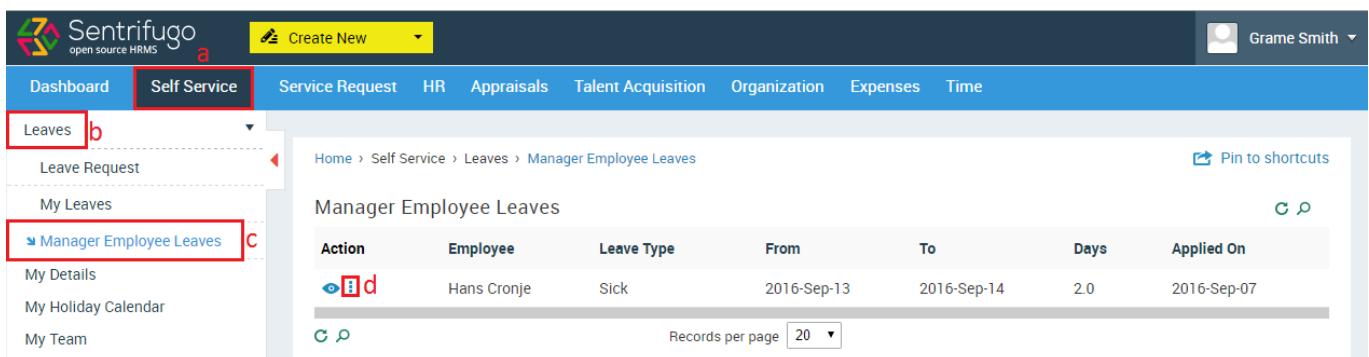
Figure 51

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

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

Employees' reporting managers have the privilege to approve/reject leave requests.

*Please refer Figure 52*



The screenshot shows the Sentrifugo self-service dashboard. The top navigation bar includes a logo, a 'Create New' button, and a user profile for 'Grame Smith'. The main menu has tabs for Dashboard, Self Service (which is highlighted with a red box), Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. A left sidebar menu has 'Leaves' selected (with a red box) and shows options like 'Leave Request', 'My Leaves', and 'Manager Employee Leaves' (also with a red box). The main content area is titled 'Manager Employee Leaves' and lists a single leave request for 'Hans Cronje' from '2016-Sep-13' to '2016-Sep-14' for '2.0' days, categorized as 'Sick'. There are also 'Pin to shortcuts' and 'Records per page' buttons at the bottom.

Figure 52

- a. Click **Self Service** in the top menu

- b. Click **Leaves** on the left menu panel
- c. Click **Manage Employee Leaves** in the submenu
- d. Click **More Actions** button in the Action column

A small pop up window will open. *Please refer Figure 53*

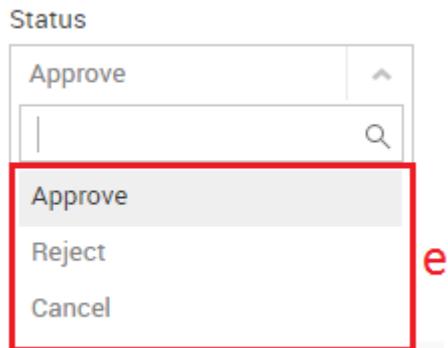


Figure 53

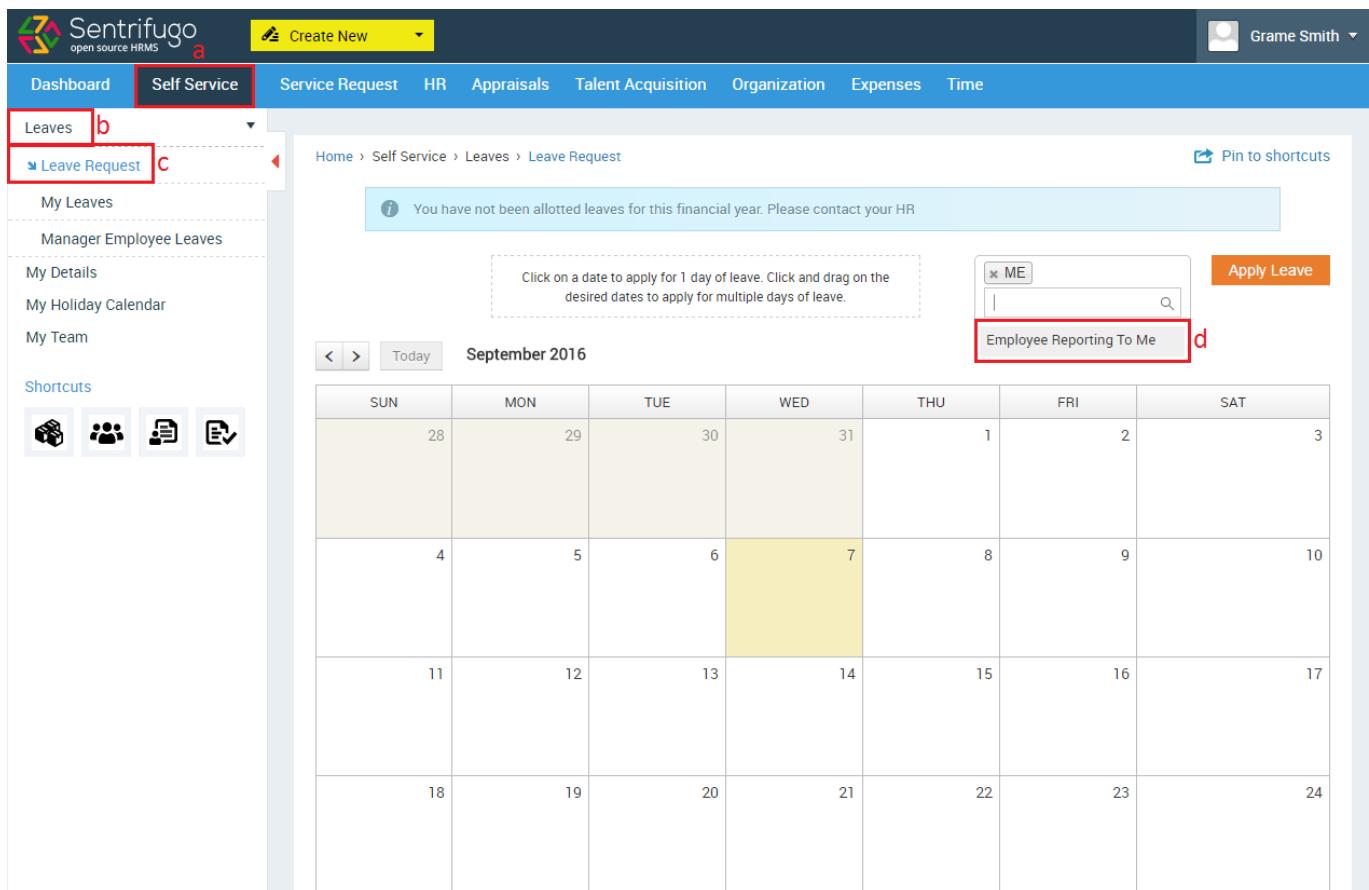
- e. Select the status

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 self-service leave request interface. The top navigation bar includes 'Create New' and a user profile for 'Grame Smith'. The main menu has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. Under 'Self Service', 'Leaves' is selected, and 'Leave Request' is the active sub-item. A sidebar on the left lists 'My Leaves', 'Manager Employee Leaves', 'My Details', 'My Holiday Calendar', and 'My Team'. Below these are 'Shortcuts' with icons for dashboard, users, documents, and email. The main content area shows a breadcrumb path: Home > Self Service > Leaves > Leave Request. A message states: 'You have not been allotted leaves for this financial year. Please contact your HR'. Below this is a calendar for September 2016. A tooltip 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 contains 'ME' and a checkbox labeled 'Employee Reporting To Me'. The date 7 is highlighted with a yellow box.

Figure 54

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

Today    September 2016

SUN	MON	TUE	WED	THU	FRI	SAT
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

Click here



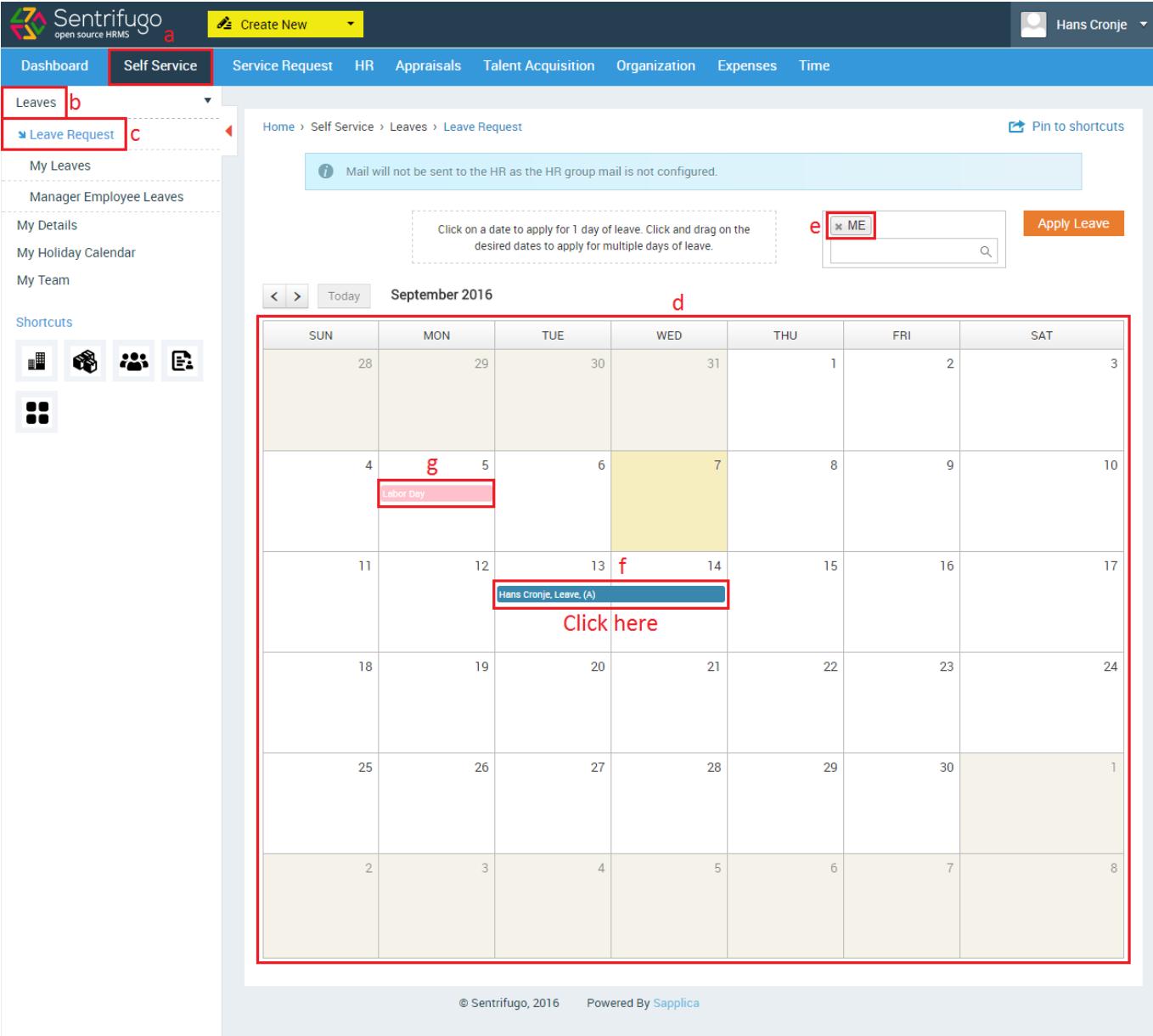
**Leaverequest**

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 interface. The top navigation bar includes a logo, a 'Create New' button, and a user profile for 'Hans Cronje'. The main menu has tabs for Dashboard, Self Service (which is selected), Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. On the left, a sidebar has 'Leaves' (marked 'b') and 'Leave Request' (marked 'c') under the 'Leaves' section. The main content area shows a calendar for September 2016. A message at the top says 'Mail will not be sent to the HR as the HR group mail is not configured.' Below the calendar, there's a note: '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 and an 'Apply Leave' button are also present. The calendar grid is outlined with a red border and labeled 'd'. Specific cells are highlighted with red boxes: cell 'g' (Labor Day) is pink, cell 'f' (September 13) has a blue horizontal bar with the text 'Hans Cronje, Leave, (A)', and cell 'e' (Me) has a red 'x' icon. A red box labeled 'Click here' points to the blue bar in cell 'f'.

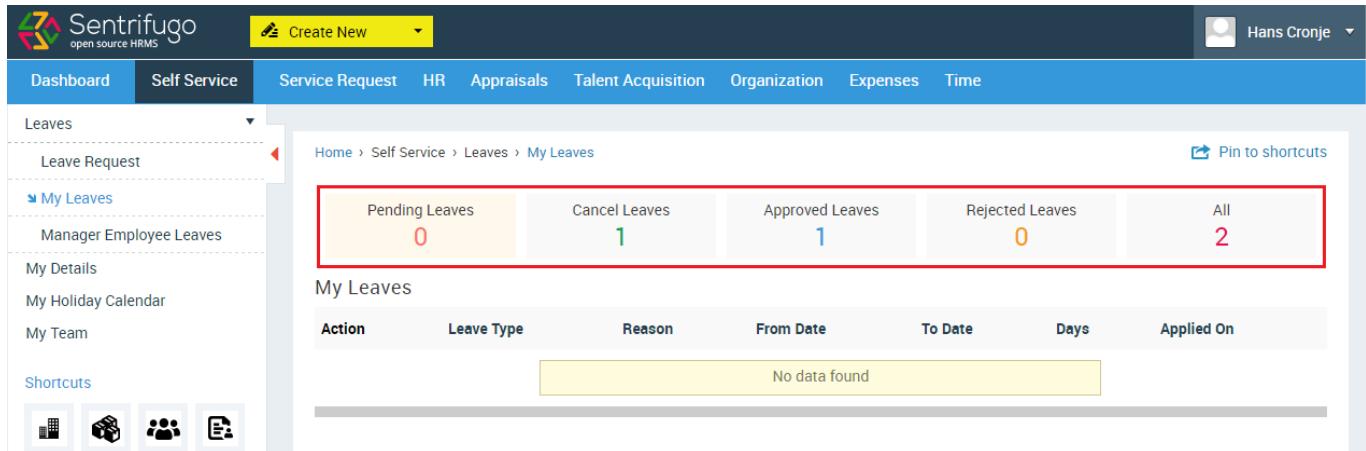
Figure 56

- Click **Self Service** in the top menu
- Click **Leaves** on the left side panel
- 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



Pending Leaves	Cancel Leaves	Approved Leaves	Rejected Leaves	All
0	1	1	0	2

Figure 57

Click on any category to view the leaves accordingly.

### 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

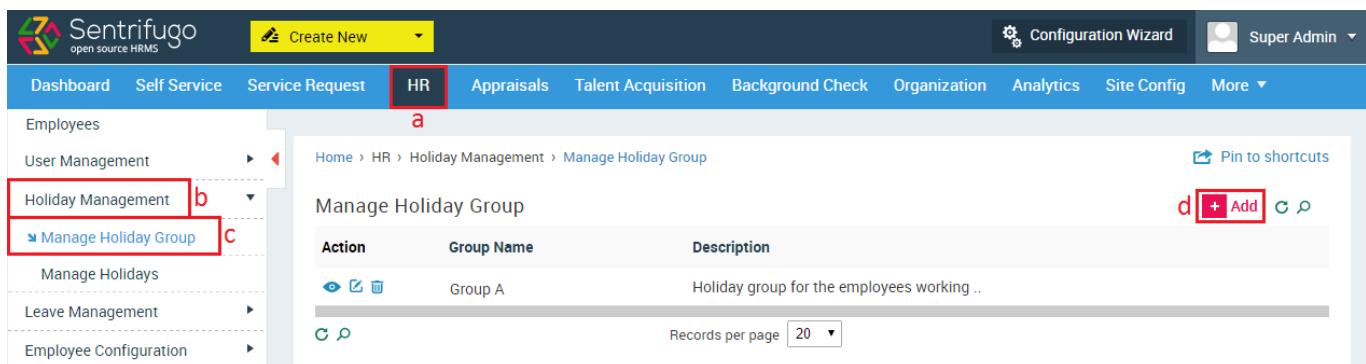
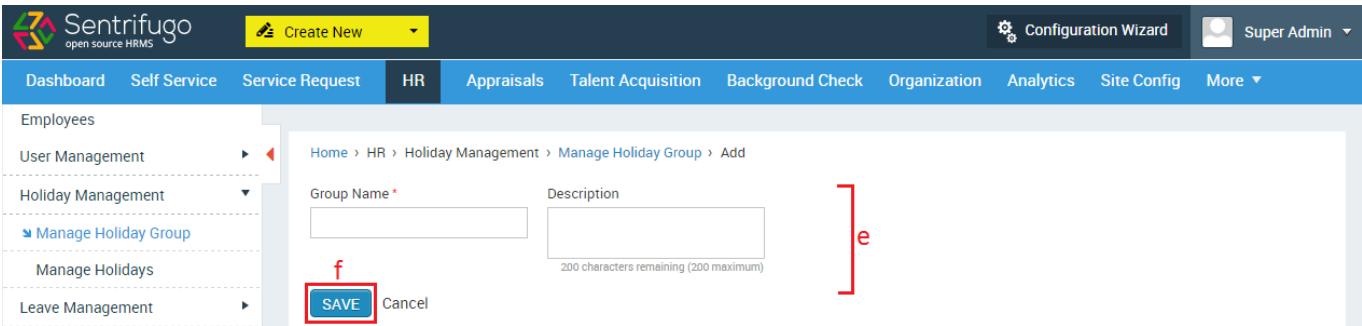


Figure 58

- 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



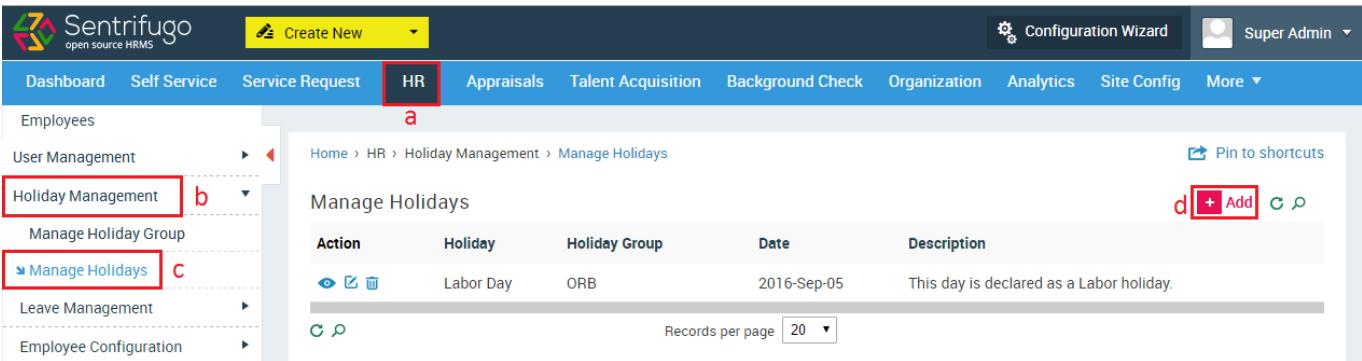
The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has 'Dashboard', 'Self Service', 'Service Request', 'HR' (which is highlighted in blue), 'Appraisals', 'Talent Acquisition', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. On the left, a sidebar under 'Employees' lists 'User Management', 'Holiday Management' (with 'Manage Holiday Group' selected), 'Manage Holidays', and 'Leave Management'. The central content area shows a breadcrumb path: Home > HR > Holiday Management > Manage Holiday Group > Add. It contains fields for 'Group Name\*' and 'Description' (with a note: '200 characters remaining (200 maximum)'). At the bottom is a 'SAVE' button with a red box around it, and a 'Cancel' link.

Figure 59

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

### 3.12 How do I create Holidays?

Please refer Figure 60

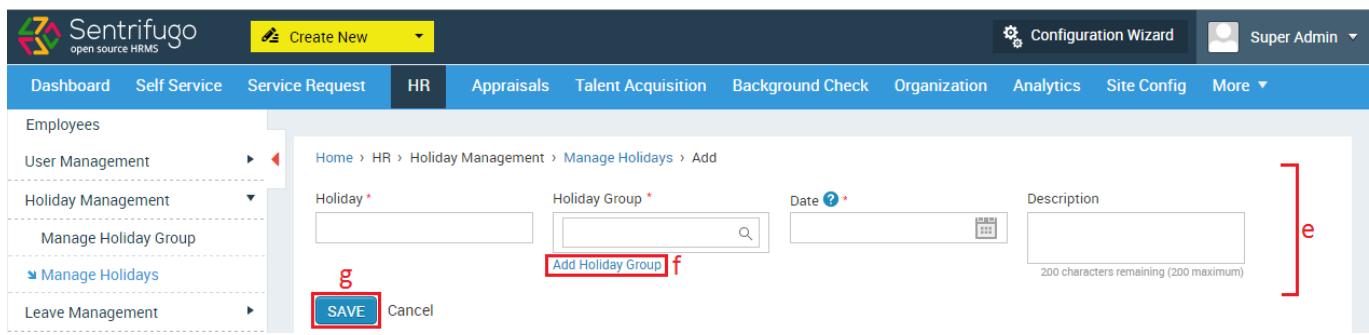


The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has 'Dashboard', 'Self Service', 'Service Request', 'HR' (highlighted in blue), 'Appraisals', 'Talent Acquisition', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. On the left, a sidebar under 'Employees' lists 'User Management', 'Holiday Management' (selected and highlighted in red), 'Manage Holiday Group', 'Manage Holidays' (selected and highlighted in red), and 'Leave Management'. The central content area shows a breadcrumb path: Home > HR > Holiday Management > Manage Holidays. It features a table titled 'Manage Holidays' with columns: Action, Holiday, Holiday Group, Date, and Description. One row is shown: 'Labor Day' under 'ORB' group on '2016-Sep-05' with the note 'This day is declared as a Labor holiday.' At the top right of the table is a 'Pin to shortcuts' icon, and at the bottom right are '+Add' and search icons.

Figure 60

- a. Click **HR** in the top menu
- b. Click **Holiday Management** on the left menu panel
- c. Click **Manage Holidays** in the submenu
- d. Click **+Add** button

Please refer Figure 61



The screenshot shows the Sentrifugo HR module interface. The top navigation bar has links for Dashboard, Self Service, Service Request, HR (which is highlighted in blue), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, More, Configuration Wizard, and Super Admin. On the left, a sidebar menu lists Employees, User Management, Holiday Management (with Manage Holiday Group and Manage Holidays), and Leave Management. The main content area shows a breadcrumb path: Home > HR > Holiday Management > Manage Holidays > Add. A form is displayed with fields for Holiday\*, Holiday Group\*, Date, and Description. A red bracket labeled 'e' covers the Description field. A red box labeled 'f' covers the 'Add Holiday Group' button. A red box labeled 'g' covers the blue 'SAVE' button.

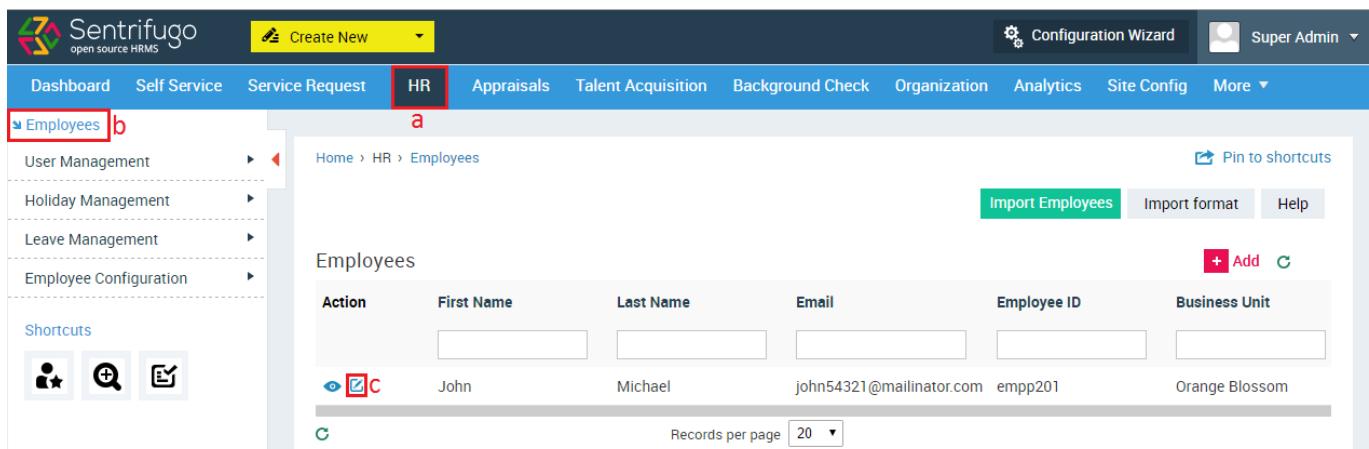
Figure 61

- e. Enter the required details
- f. Add a new Holiday Group
- g. 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*

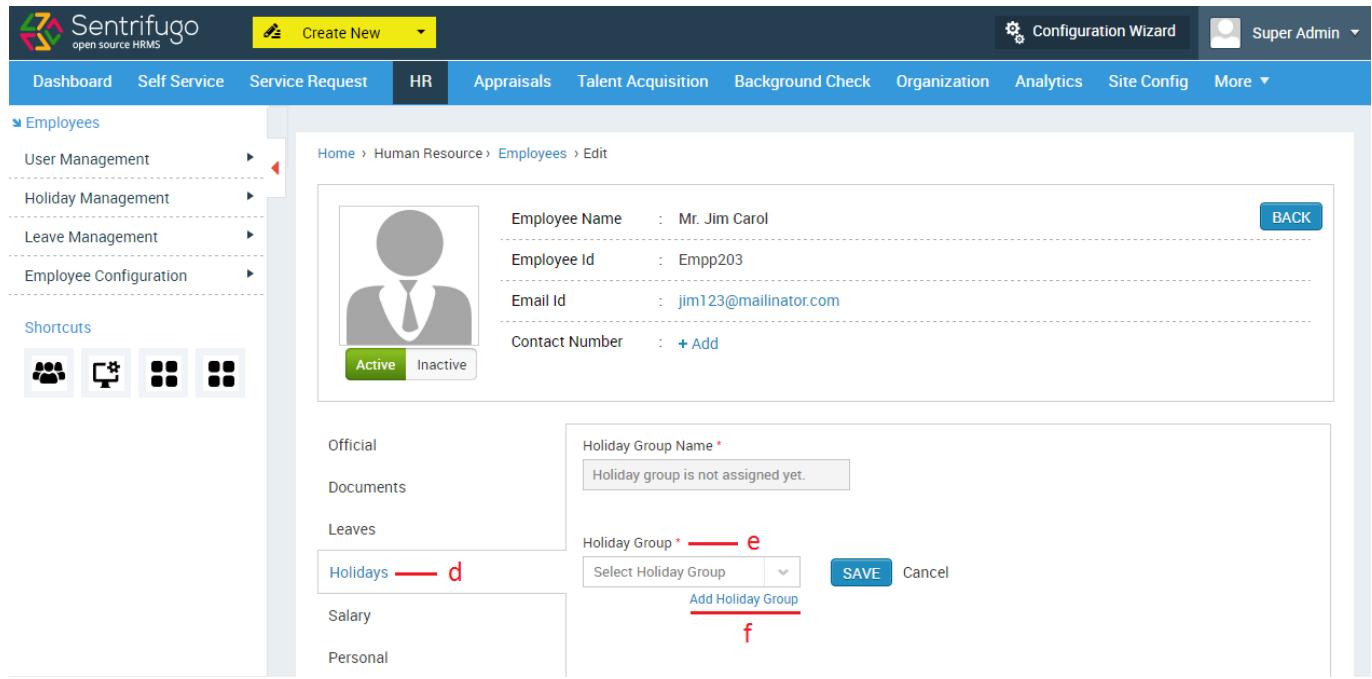


The screenshot shows the Sentrifugo HR module interface. The top navigation bar has links for Dashboard, Self Service, Service Request, HR (highlighted in red), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, More, Configuration Wizard, and Super Admin. On the left, a sidebar menu lists Employees (highlighted in red) and other modules like User Management, Holiday Management, Leave Management, and Employee Configuration. The main content area shows a breadcrumb path: Home > HR > Employees. It features a table titled 'Employees' with columns for Action, First Name, Last Name, Email, Employee ID, and Business Unit. A row for 'John Michael' is selected, indicated by a red checkmark in the Action column. A red bracket labeled 'a' covers the HR menu item. A red bracket labeled 'b' covers the Employees menu item. A red box labeled 'c' covers the edit icon in the Action column of the selected employee row.

Figure 62

- a. Click **HR** in the top menu
- b. Click **Employees** on the left menu side
- c. Click **Edit** icon against any employee name

Please refer Figure 63



Employee Name : Mr. Jim Carol  
 Employee Id : Empp203  
 Email Id : jim123@mailinator.com  
 Contact Number : + Add

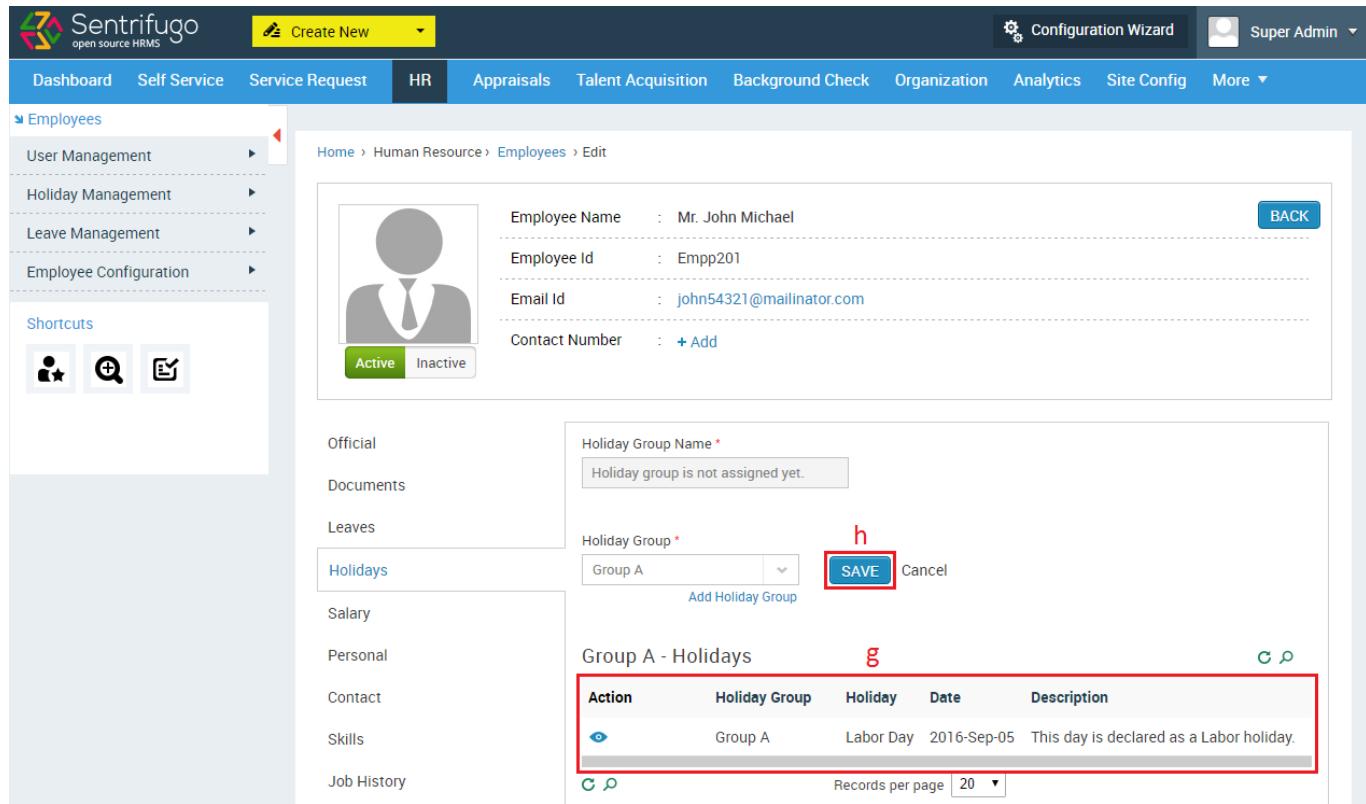
Official  
 Holiday Group Name \*  
 Holiday group is not assigned yet.

Leaves  
 Holidays — **d**  
 Holiday Group \* — **e**  
 Select Holiday Group  
 Add Holiday Group — **f**

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 application interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. The HR tab is selected. On the left, a sidebar titled 'Employees' contains links for User Management, Holiday Management, Leave Management, Employee Configuration, and Shortcuts (with icons for users, search, and edit).

The main content area shows an employee profile for 'Mr. John Michael' (Employee ID: Empp201, Email ID: john54321@mailinator.com). Below the profile, there are sections for Official, Documents, Leaves, Holidays, Salary, Personal, Contact, Skills, and Job History. The 'Holidays' section is highlighted with a red box and labeled 'g'. It shows a table titled 'Group A - Holidays' with one entry:

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

Below the table are buttons for 'Records per page' (set to 20) and 'C P' (refresh/cancel). To the right of the table, there is a 'SAVE' button (labeled 'h') and a 'Cancel' button.

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

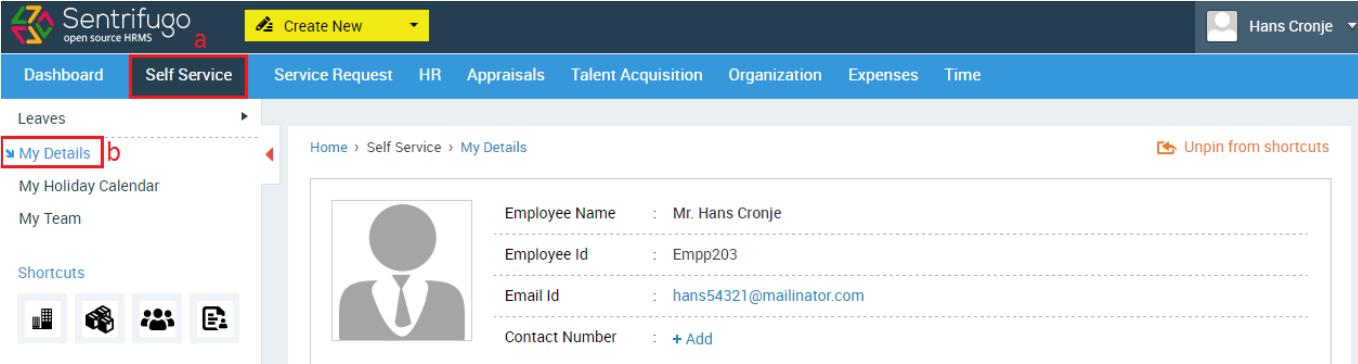
Self-Service enables you to raise and handle leave requests. You can access your personal information, documents and leave details. You can also check the details of the employees working in your team. A Manager has the privilege to add Employees to Sentrifugo, provided he is their reporting manager.

### 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*



The screenshot shows the Sentrifugo self-service interface. At the top, there is a navigation bar with the Sentrifugo logo, a 'Create New' button, and a user profile for 'Hans Cronje'. Below the navigation bar is a horizontal menu with tabs: Dashboard, Self Service (which is highlighted with a red box), Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. On the left side, there is a sidebar with sections for Leaves, My Holiday Calendar, My Team, and Shortcuts, each with corresponding icons. The main content area displays the 'My Details' page under the 'Self Service' tab. It shows a profile picture placeholder and a list of employee details:

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

At the top right of the main content area, there is a link 'Unpin from shortcuts'.

Figure 65

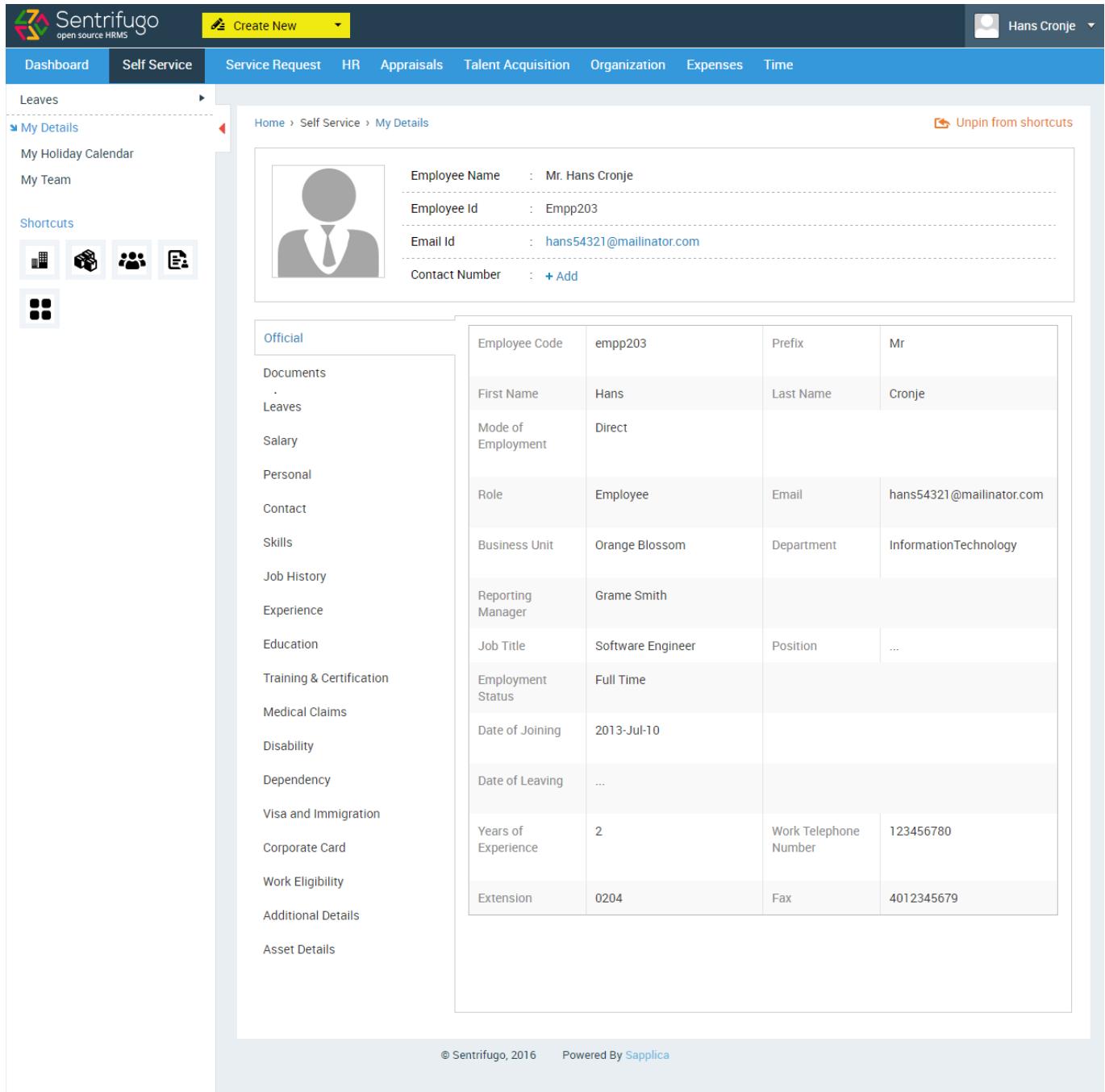
- Click **Self Service** in the top menu
- Click **My Details** on the left menu panel



Only the Super Admin/Management/HR has the privilege to add/edit/delete 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, Talent Acquisition, Organization, Expenses, and Time. The 'Self Service' tab is currently selected. On the far right of the top bar, there is a user profile for 'Hans Cronje'. Below the navigation bar, there is a sidebar on the left containing links for Leaves, My Details, My Holiday Calendar, and My Team. Under 'Shortcuts', there are icons for Home, Self Service, My Details, and a grid icon. The main content area displays the 'My Details' section for 'Hans Cronje'. It includes a placeholder profile picture and a table with the following data:

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

Below this, there is a larger table titled 'Official' containing detailed information about the employee. The columns are Employee Code, 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 Extension. The data is as follows:

Employee Code	Prefix	First Name	Last Name
empp203	Mr	Hans	Cronje
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

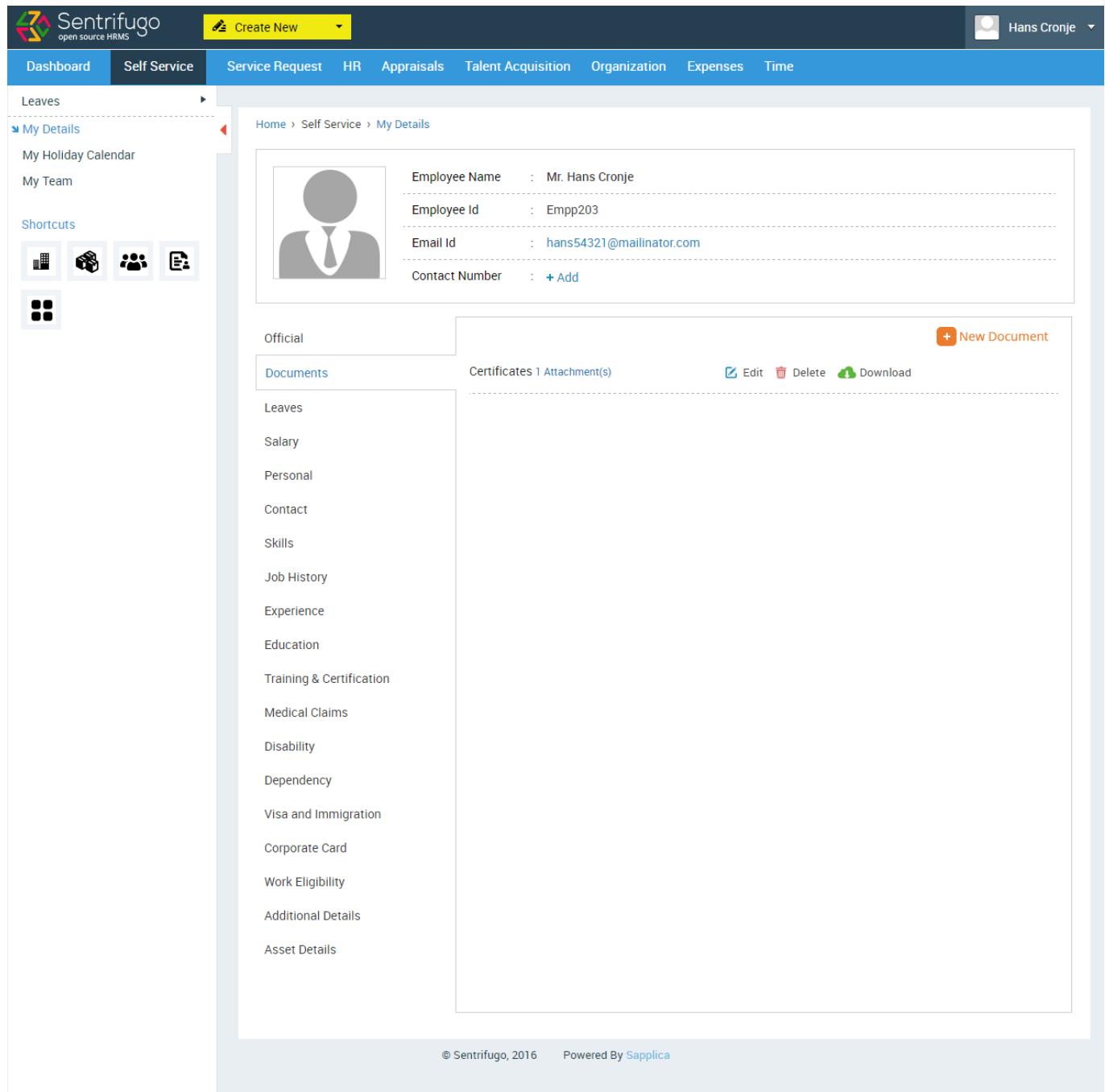
At the bottom of the page, there are copyright and power information: © Sentrifugo, 2016 and Powered By Sapplica.

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 HRMS application interface. At the top, there is a navigation bar with links for Dashboard, Self Service (which is currently selected), Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. A user profile for 'Hans Cronje' is shown on the right. Below the navigation bar, a sidebar on the left contains links for Leaves, My Holiday Calendar, and My Team, along with a 'Shortcuts' section featuring icons for Home, Work, People, and Tasks.

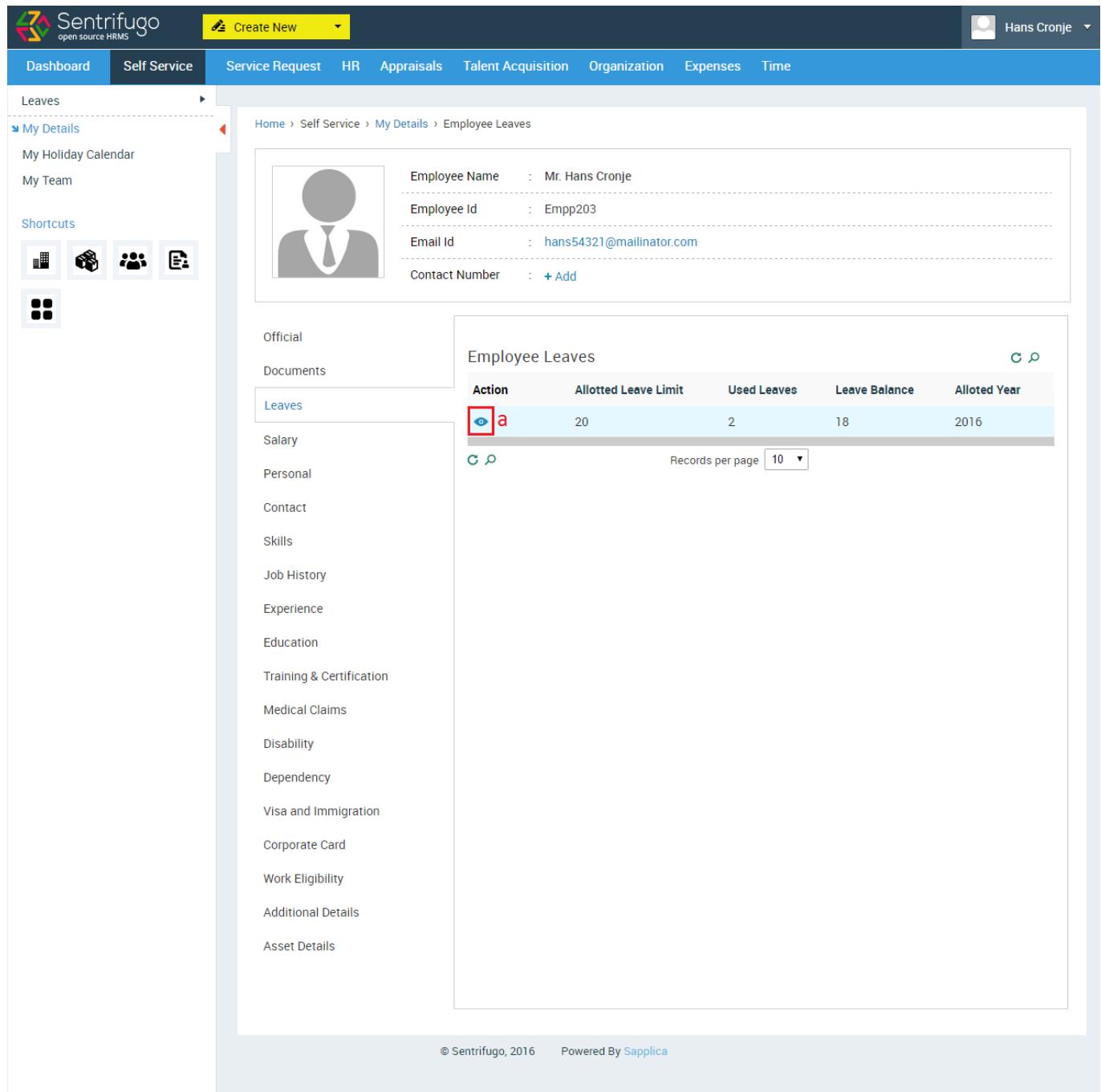
The main content area displays 'My Details' information for Mr. Hans Cronje, including Employee Name (Mr. Hans Cronje), Employee Id (Empp203), Email Id (hans54321@mailinator.com), and Contact Number (+ Add). Below this, there is a section for 'Official' documents. On the left, a sidebar lists various document categories: 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. On the right, there is a table for 'Certificates 1 Attachment(s)' with columns for Edit, Delete, and Download. A 'New Document' button is located at the top right of this section. 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



The screenshot shows the Sentrifugo open source HRMS application interface. The top navigation bar includes the logo, a 'Create New' button, and a user profile for 'Hans Cronje'. Below the header is a blue navigation bar with links: Dashboard, Self Service (which is selected), Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time.

The main content area has a left sidebar titled 'My Details' containing 'My Holiday Calendar' and 'My Team'. Under 'Shortcuts', there are icons for Home, My Profile, My Tasks, and My Reports. The main panel shows 'Employee Leaves' details for Mr. Hans Cronje, including Employee Name, Employee Id, Email Id, and Contact Number. A table titled 'Employee Leaves' displays leave information for the year 2016, showing an Allotted Leave Limit of 20, Used Leaves of 2, and a Leave Balance of 18. An action column contains a red-bordered eye icon with the letter 'a' next to it. At the bottom of the main panel, there are links for 'Records per page' (set to 10) and 'C P' (refresh/clear).

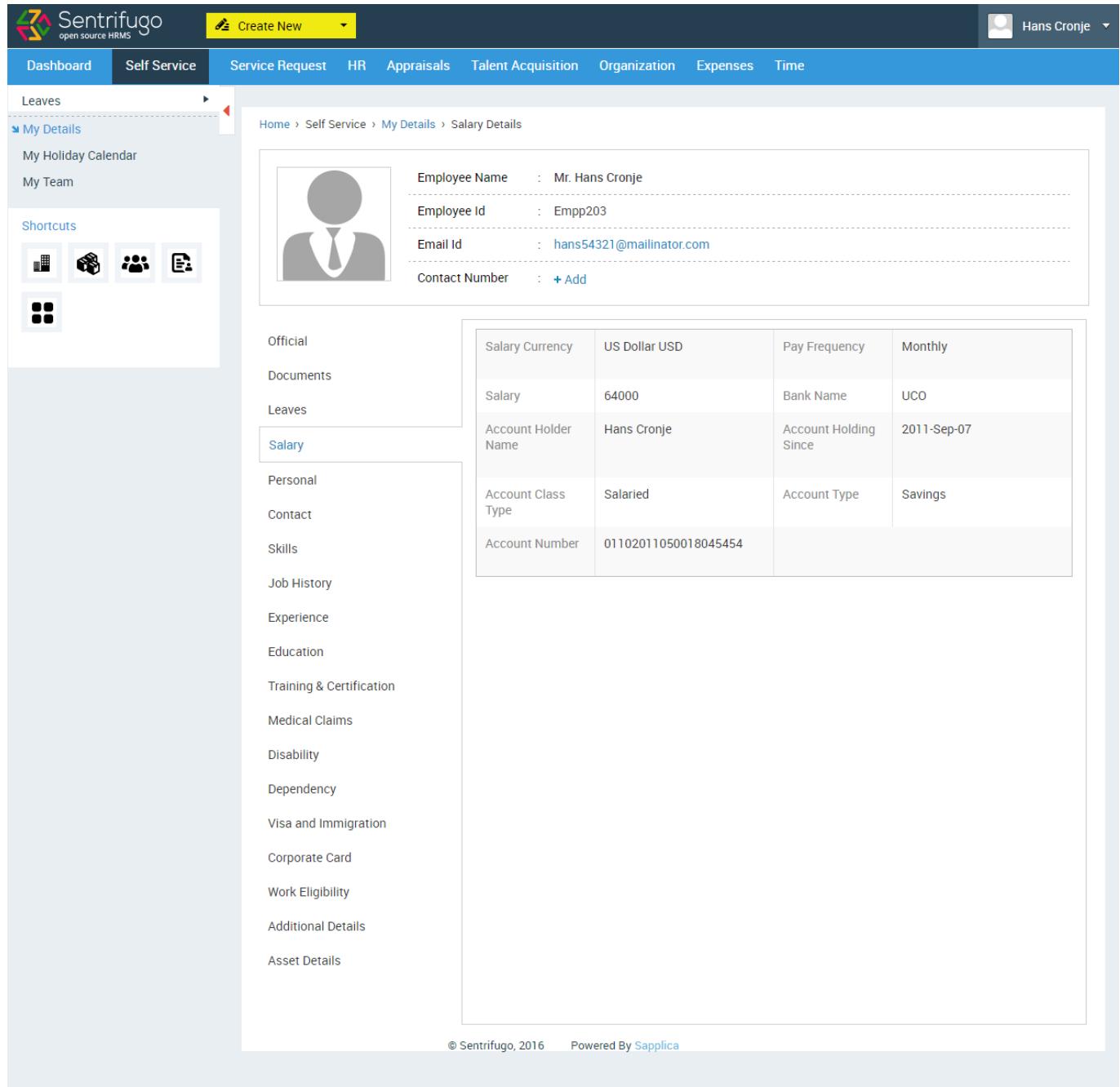
Figure 68

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 (which is currently selected), Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. A yellow button labeled 'Create New' is also present. On the right, a user profile for 'Hans Cronje' is shown.

The main content area displays 'My Details' under 'Self Service'. It includes a sidebar with 'My Holiday Calendar' and 'My Team' sections, and a 'Shortcuts' section with icons for Home, Employees, and Reports. The main panel shows 'Salary Details' with a profile picture of Mr. Hans Cronje. Below this, a table provides salary and account information:

Employee Name	Mr. Hans Cronje
Employee Id	Empp203
Email Id	hans54321@mailinator.com
Contact Number	+ Add
Salary Currency	US Dollar USD
Pay Frequency	Monthly
Bank Name	UCO
Account Holder Name	Hans Cronje
Account Holding Since	2011-Sep-07
Account Class Type	Salaried
Account Type	Savings
Account Number	01102011050018045454

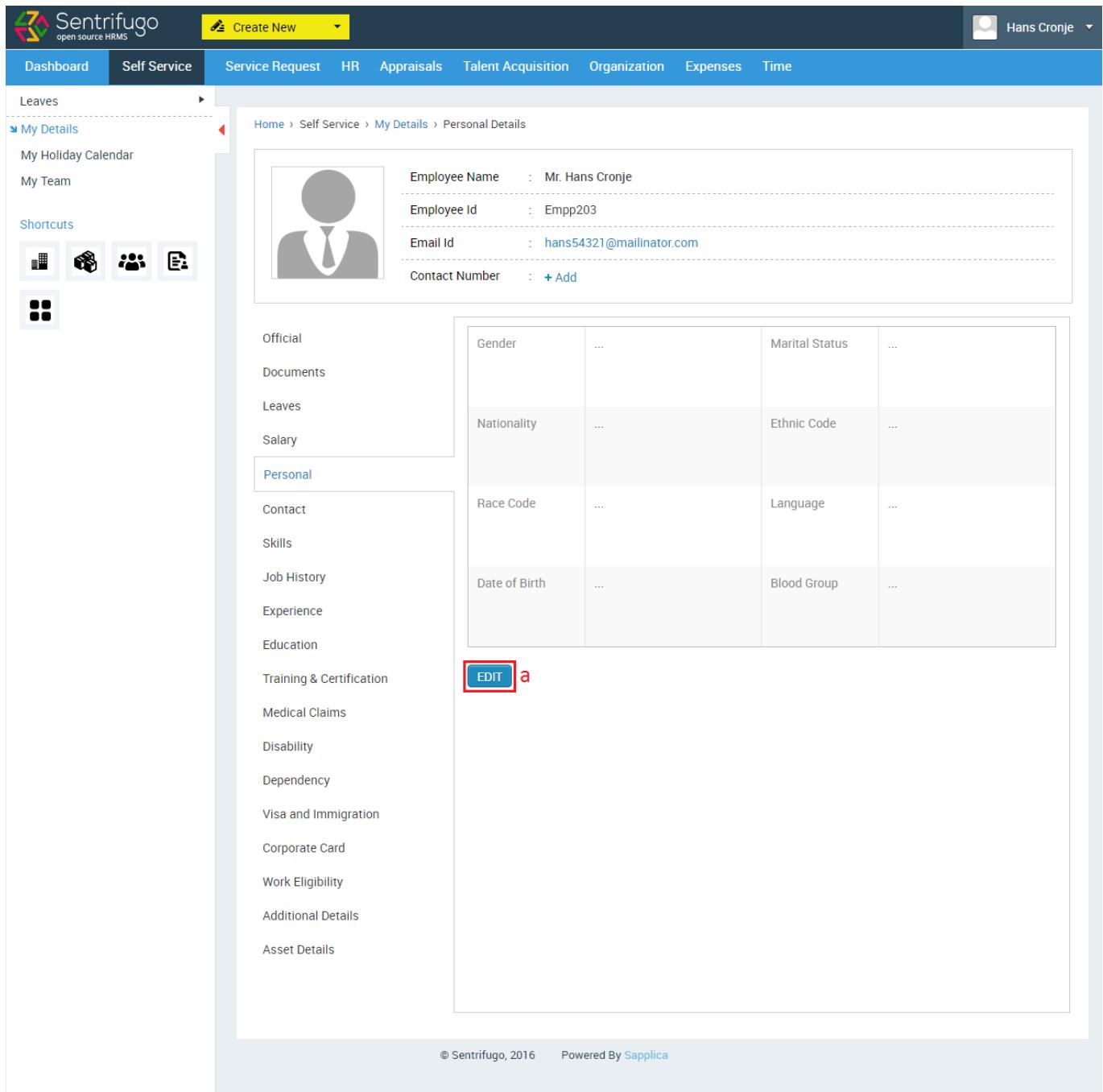
On the left side of the main panel, there is a vertical list of other details such as Official Documents, Leaves, Personal Contact, Skills, Job History, Experience, Education, Training & Certification, Medical Claims, Disability, Dependency, Visa and Immigration, Corporate Card, Work Eligibility, Additional Details, and Asset Details. The 'Salary' option is currently selected.

Figure 69

You can view your salary and account details.

## Personal

Please refer Figure 70



The screenshot shows the Sentrifugo Self Service interface. The top navigation bar includes a logo, a 'Create New' button, and a user profile for 'Hans Cronje'. Below the navigation is a blue header bar with tabs: Dashboard, Self Service (selected), Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. On the left, a sidebar titled 'My Details' lists: My Holiday Calendar, My Team, Shortcuts (with icons for Home, Work, People, and Lists), Leaves, and a list of personal details. The 'Personal' tab is selected in this list. The main content area shows 'Personal Details' with fields for Employee Name (Mr. Hans Cronje), Employee Id (Empp203), Email Id (hans54321@mailinator.com), and Contact Number (+ Add). To the right is a grid of personal information fields:

Gender	...	Marital Status	...
Nationality	...	Ethnic Code	...
Race Code	...	Language	...
Date of Birth	...	Blood Group	...

Below the grid, a red box highlights the 'EDIT' button next to the label 'a'.

Figure 70

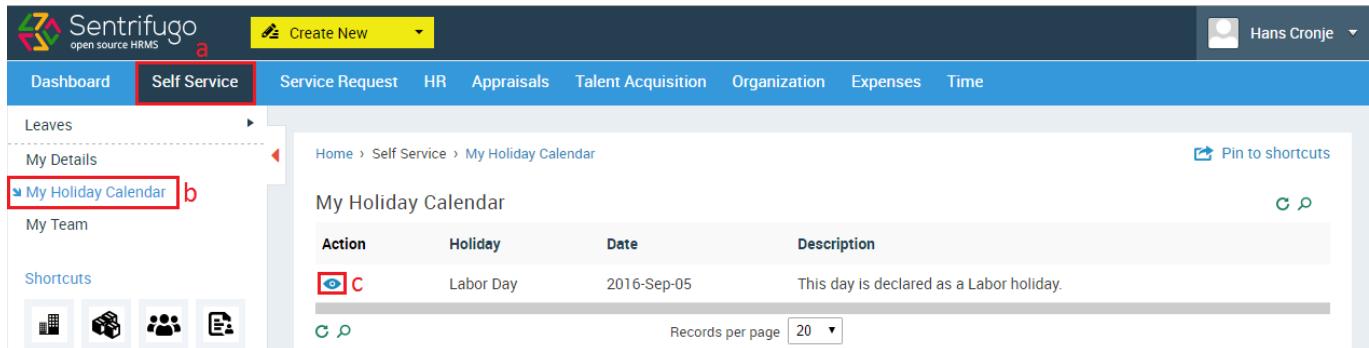
- Click **Edit icon** to add or modify any details

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 self-service interface. The top navigation bar includes 'Create New' (with a dropdown arrow), the user name 'Hans Cronje', and a profile icon. The main menu has tabs: Dashboard, Self Service (which is highlighted with a red box), Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. On the left sidebar, under 'Leaves', there are links for 'My Details', 'My Holiday Calendar' (which is highlighted with a red box and labeled 'b'), 'My Team', and 'Shortcuts'. Below the sidebar are four icons: a building, a person, a group, and a document. The central content area shows a breadcrumb path: Home > Self Service > My Holiday Calendar. It displays a table titled 'My Holiday Calendar' with columns: Action, Holiday, Date, and Description. One record is listed: 'Labor Day' on '2016-Sep-05' with the note 'This day is declared as a Labor holiday.' At the bottom right of the table are 'Records per page' and a dropdown set to '20'. There are also 'Pin to shortcuts' and 'Print' icons.

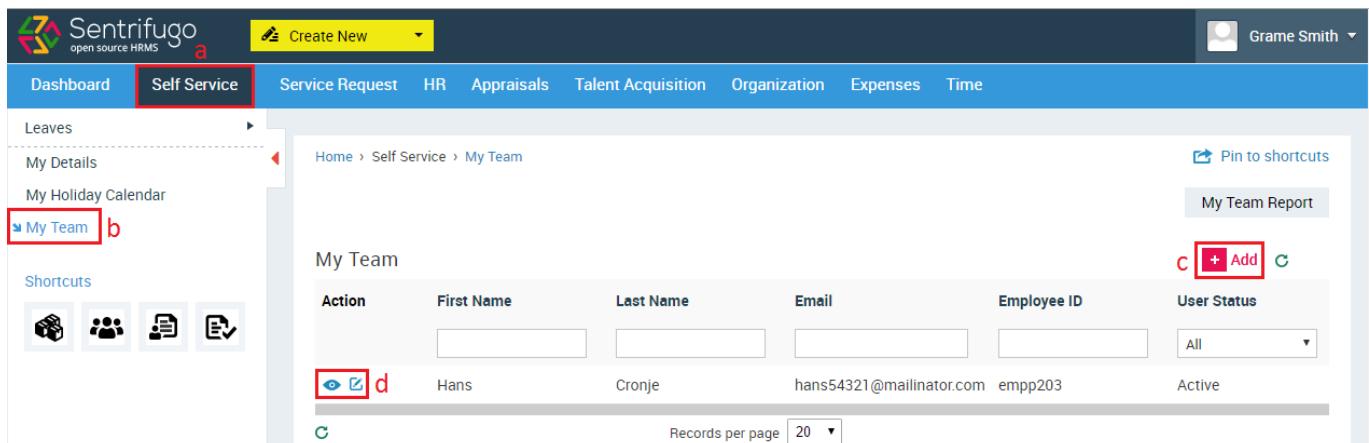
Figure 71

- 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 self-service interface. The top navigation bar includes 'Create New' (with a dropdown arrow), the user name 'Grame Smith', and a profile icon. The main menu has tabs: Dashboard, Self Service (highlighted with a red box), Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. On the left sidebar, under 'Leaves', there are links for 'My Details', 'My Holiday Calendar', and 'My Team' (highlighted with a red box and labeled 'b'). Below the sidebar are four icons: a building, a person, a group, and a document. The central content area shows a breadcrumb path: Home > Self Service > My Team. It displays a table titled 'My Team' with columns: Action, First Name, Last Name, Email, Employee ID, and User Status. One record is listed: 'Hans' with 'Cronje' as the last name, email 'hans54321@mailinator.com', employee ID 'empp203', and user status 'Active'. At the top right of the table are 'My Team Report' and 'Add' buttons (labeled 'c'). Below the table are 'Records per page' and a dropdown set to '20'. There are also 'Pin to shortcuts' and 'Print' icons.

Figure 72

- Click **Self Service** in the top menu
- Click **My Team** on the left menu panel
- Click **+Add** button to add an employee to your team ([Refer section 1.4.2 Adding Other Employees](#))

Or

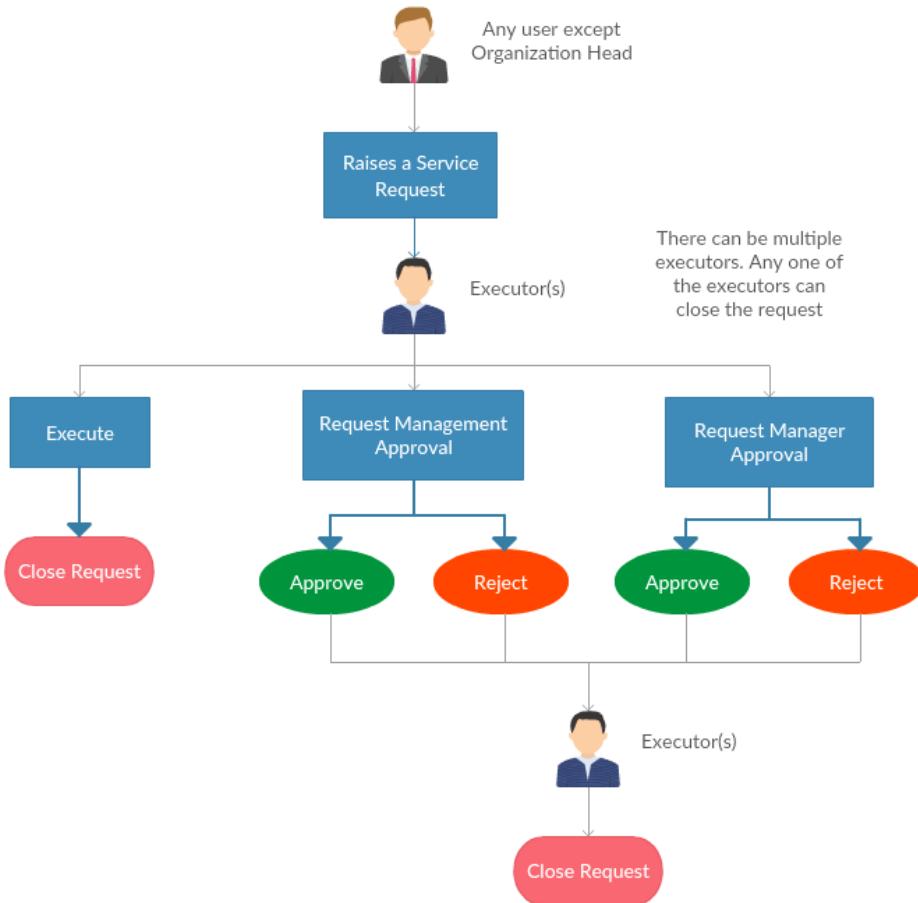
- Click **View/Edit** icon to view or edit employee details



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.

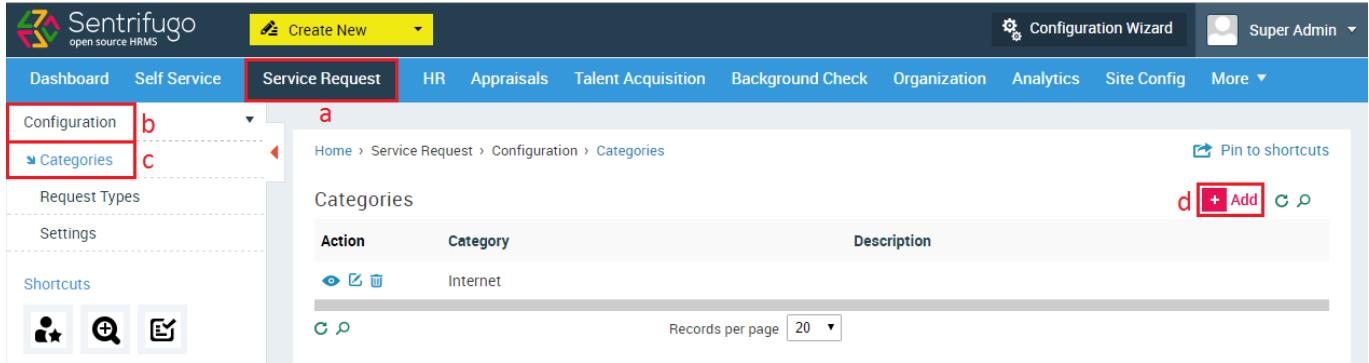


### Description:

- 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

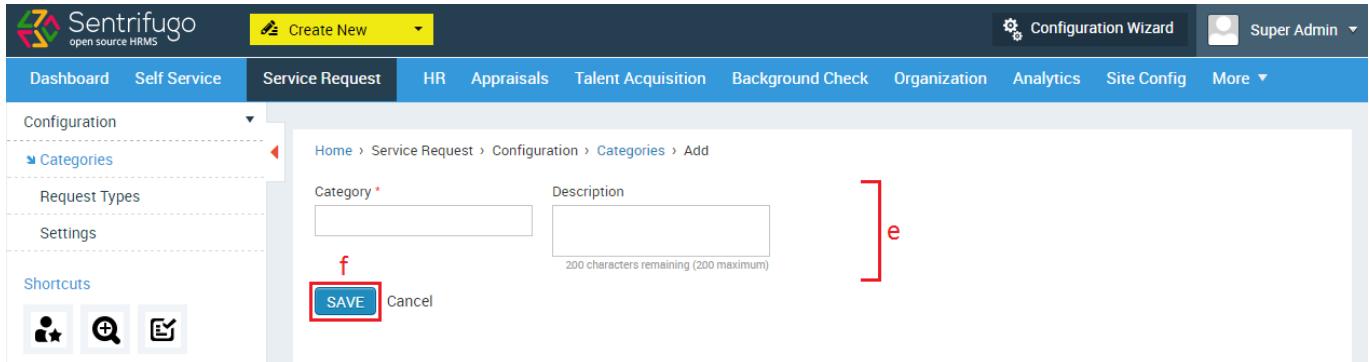


The screenshot shows the Sentrifugo HRMS interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request (which is highlighted with a red box), HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. Below the navigation bar is a left sidebar with sections for Configuration (highlighted with a red box), Categories (highlighted with a red box), Request Types, and Settings. The main content area displays a table titled 'Categories' with one record: 'Internet'. On the right side of the main content area, there is a toolbar with icons for Pin to shortcuts, Add (highlighted with a red box), and other actions. The URL in the browser's address bar is 'Home > Service Request > Configuration > Categories'.

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



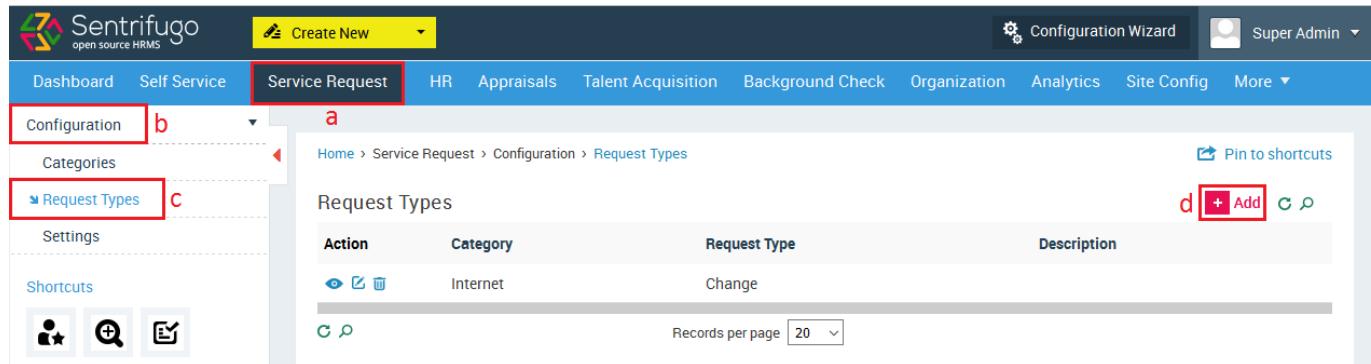
The screenshot shows the 'Add Category' form. The left sidebar has the 'Categories' section selected. The main form has fields for 'Category' (highlighted with a red box) and 'Description'. The 'Category' field has a note: '200 characters remaining (200 maximum)'. At the bottom of the form are 'SAVE' and 'Cancel' buttons, with the 'SAVE' button highlighted with a red box and a red arrow pointing to it. A red bracket labeled 'e' spans from the 'Category' field to the 'SAVE' button.

Figure 74

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

## 5.2 How do I create Service Request Types?

Please refer Figure 75



Action	Category	Request Type	Description
	Internet	Change	

Figure 75

- a. Click on the Service Request in the top menu
- b. Click Configuration on the left side panel
- c. Click Request Type submenu
- d. Click +Add button on the right side

Please refer Figure 76

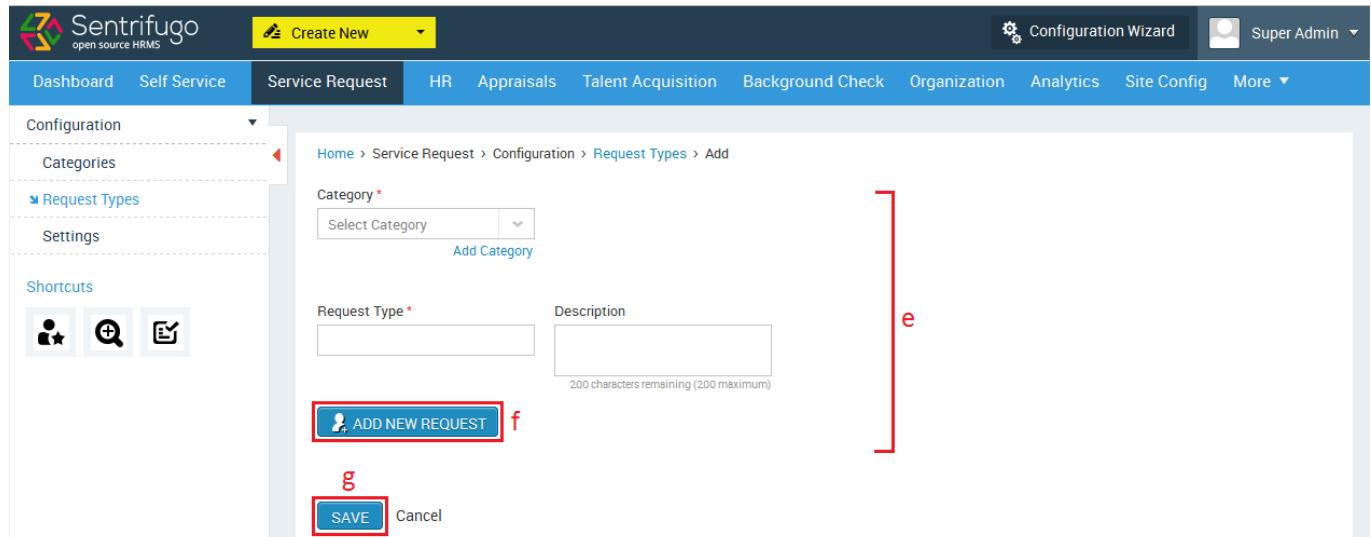
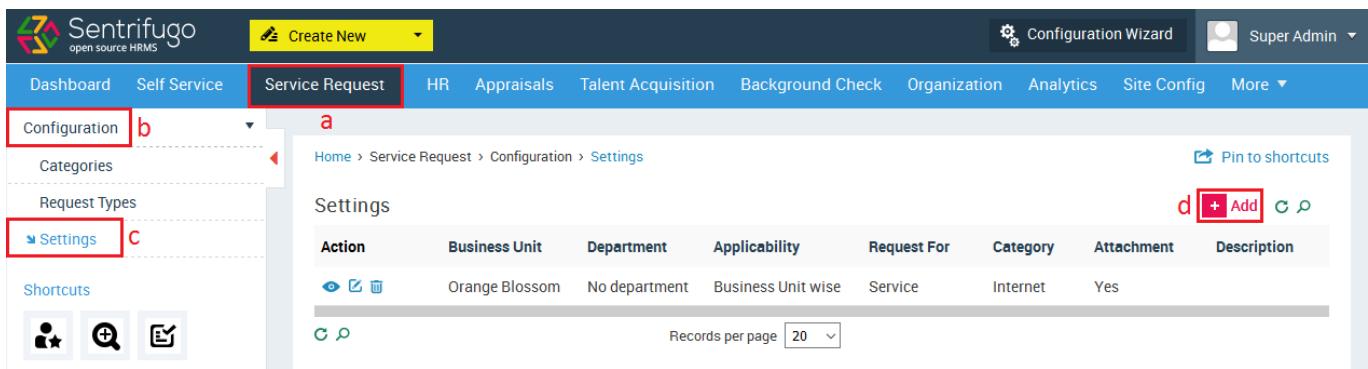


Figure 76

- e. Enter the Required details
- f. Click ADD NEW REQUEST to add more requests in the same category
- g. Click SAVE button

## 5.3 How do I configure Service Request settings?

Please refer Figure 77

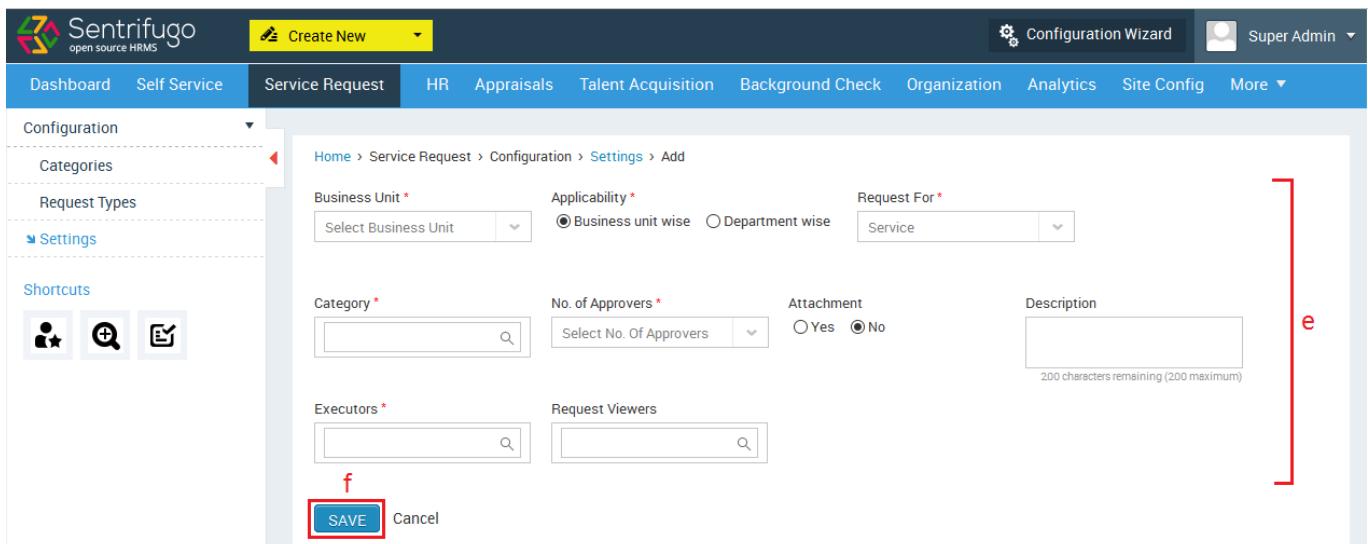


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. Below the navigation is a horizontal menu with items: Dashboard, Self Service, Service Request (highlighted in yellow), HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left, a vertical sidebar titled 'Configuration' contains sections for Categories, Request Types, and Settings (which is expanded). At the bottom of the sidebar are three icons: a user profile, a magnifying glass, and a document. The main content area displays a table titled 'Settings' with columns: Action, Business Unit, Department, Applicability, Request For, Category, Attachment, and Description. One row is visible: Action is 'Orange Blossom', Business Unit is 'Orange Blossom', Department is 'No department', Applicability is 'Business Unit wise', Request For is 'Service', Category is 'Internet', Attachment is 'Yes', and Description is 'Yes'. There are also buttons for 'Pin to shortcuts', '+ Add', and a refresh icon. A footer at the bottom shows 'Records per page' set to 20.

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



The screenshot shows the 'Add' form for 'Settings' in the 'Service Request' configuration. The left sidebar shows 'Configuration' selected. The main form has fields for Business Unit (dropdown), Applicability (radio buttons for 'Business unit wise' and 'Department wise', with 'Business unit wise' selected), Request For (dropdown), Category (dropdown), No. of Approvers (dropdown), Attachment (radio buttons for 'Yes' and 'No', with 'No' selected), and Description (text area with a character limit of 200). Below these are fields for Executors (dropdown) and Request Viewers (dropdown). At the bottom are 'SAVE' and 'Cancel' buttons, with 'SAVE' highlighted by a red box. A red bracket labeled 'e' covers the right side of the form.

Figure 78

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

## 5.4 Who are Approvers, Executors and Viewers?

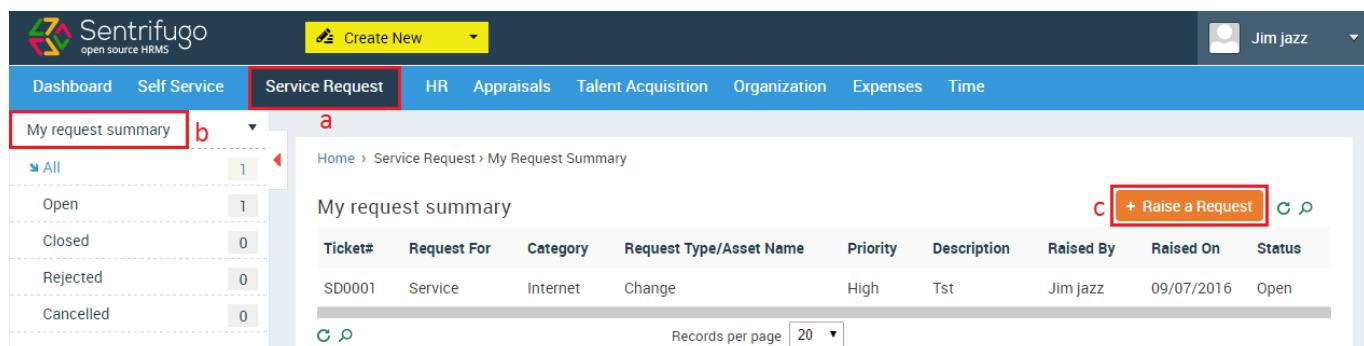
**Approvers \*Management\***: They are responsible for providing approval for service requests. Executor(s) send a request for approval to the Approver(s). You can have a maximum of 3 approvers and a minimum of 1 approver.

**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

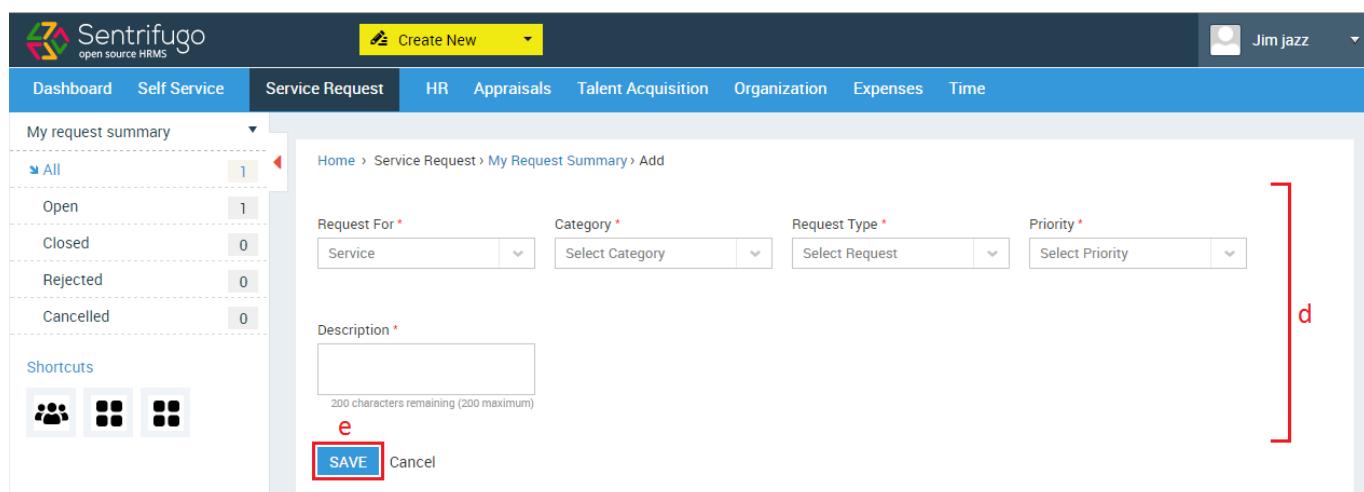


The screenshot shows the Sentrifugo web application interface. The top navigation bar includes links for Dashboard, Self Service, Service Request (which is highlighted in red), HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. A user profile for 'Jim jazz' is shown on the right. The main content area has a title 'My request summary'. On the left, there's a sidebar with a dropdown menu labeled 'My request summary' (marked 'b') and a list of status filters: All (marked '1'), Open (marked '1'), Closed (marked '0'), Rejected (marked '0'), and Cancelled (marked '0'). The main table lists one request: SD0001, Service, Internet, Change, High priority, raised by Tst on 09/07/2016, and currently Open. There are buttons for '+ Raise a Request' (marked 'c') and a refresh icon. At the bottom, there are buttons for 'C' and 'P', and a dropdown for 'Records per page' set to 20.

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



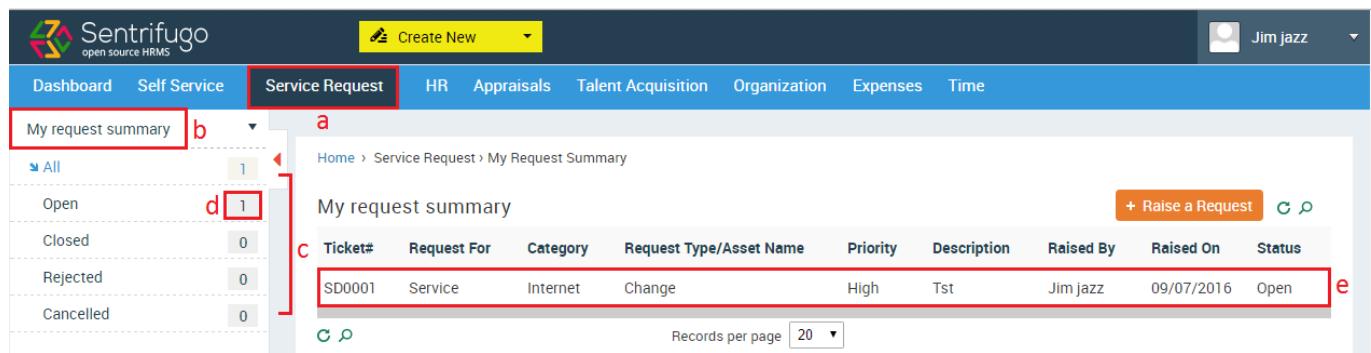
The screenshot shows the 'Add' form for a new service request. The top navigation bar and user profile are identical to Figure 79. The sidebar includes a 'My request summary' dropdown and a 'Shortcuts' section with three icons. The main form has fields for 'Request For' (Service), 'Category' (Select Category), 'Request Type' (Select Request), and 'Priority' (Select Priority). Below these is a 'Description' field with a note about character count (200 characters remaining). At the bottom are 'SAVE' and 'Cancel' buttons, with 'SAVE' highlighted in a red box. A red bracket 'd' points to the right side of the form, and a red box 'e' highlights 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

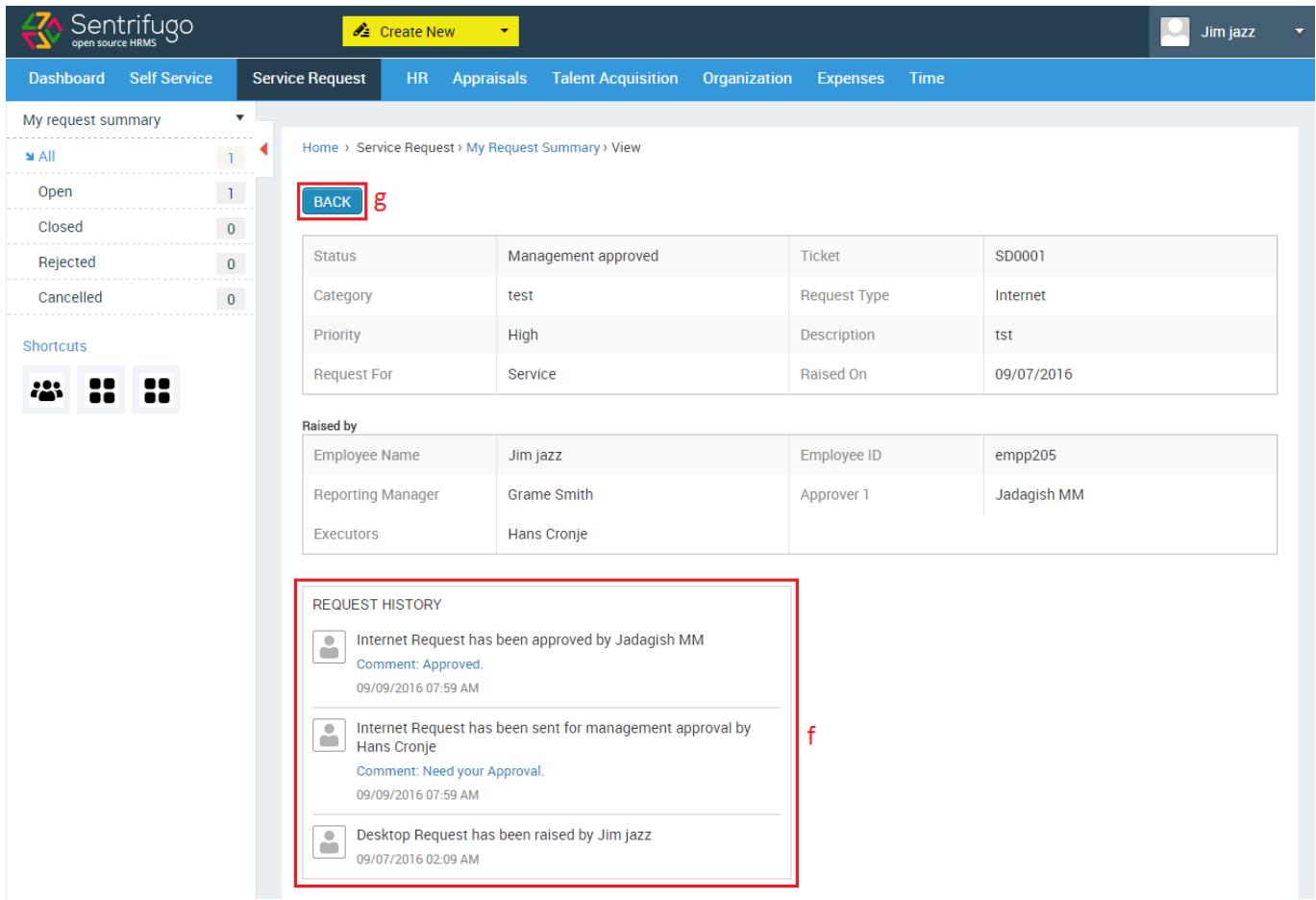
Figure 81

- 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 Service Request module. At the top, there's a navigation bar with links for Dashboard, Self Service, Service Request (which is selected), HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. A 'Create New' button is also present. On the right, a user profile for 'Jim jazz' is shown.

On the left, a sidebar displays 'My request summary' with categories: All (1), Open (1), Closed (0), Rejected (0), and Cancelled (0). Below this are 'Shortcuts' with icons for users, reports, and settings.

The main content area shows a request summary for a ticket labeled SD0001. The details are:

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

Below this, under 'Raised by', are the details:

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

A red box highlights the 'REQUEST HISTORY' section, which contains the following entries:

- Internet Request has been approved by Jadagish MM  
Comment: Approved.  
09/09/2016 07:59 AM
- 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

Red boxes also highlight the 'BACK' button in the breadcrumb and the 'REQUEST HISTORY' section.

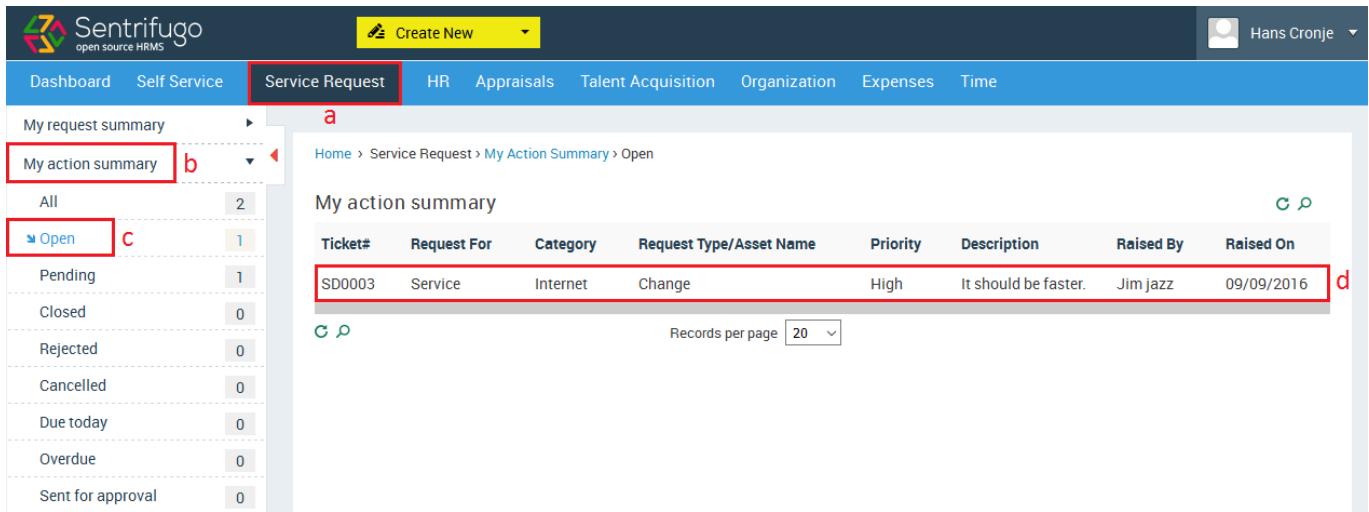
Figure 82

- 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 interface with the following details:

- Top Navigation:** Create New (dropdown), Hans Cronje (user icon).
- Main Menu:** Dashboard, Self Service, **Service Request** (highlighted with a red box and labeled 'a'), HR, Appraisals, Talent Acquisition, Organization, Expenses, Time.
- Left Sidebar:** My request summary (dropdown), My action summary (highlighted with a red box and labeled 'b'). Submenu items include All (2), Open (1, highlighted with a red box and labeled 'c'), Pending (1), Closed (0), Rejected (0), Cancelled (0), Due today (0), Overdue (0), and Sent for approval (0).
- Content Area:** Home > Service Request > My Action Summary > Open. The title is "My action summary". A table lists one ticket record:
 

Ticket#	Request For	Category	Request Type/Asset Name	Priority	Description	Raised By	Raised On
SD0003	Service	Internet	Change	High	It should be faster.	Jim jazz	09/09/2016

 There are also "C" and "P" icons at the top right of the table, and a "Records per page" dropdown set to 20.

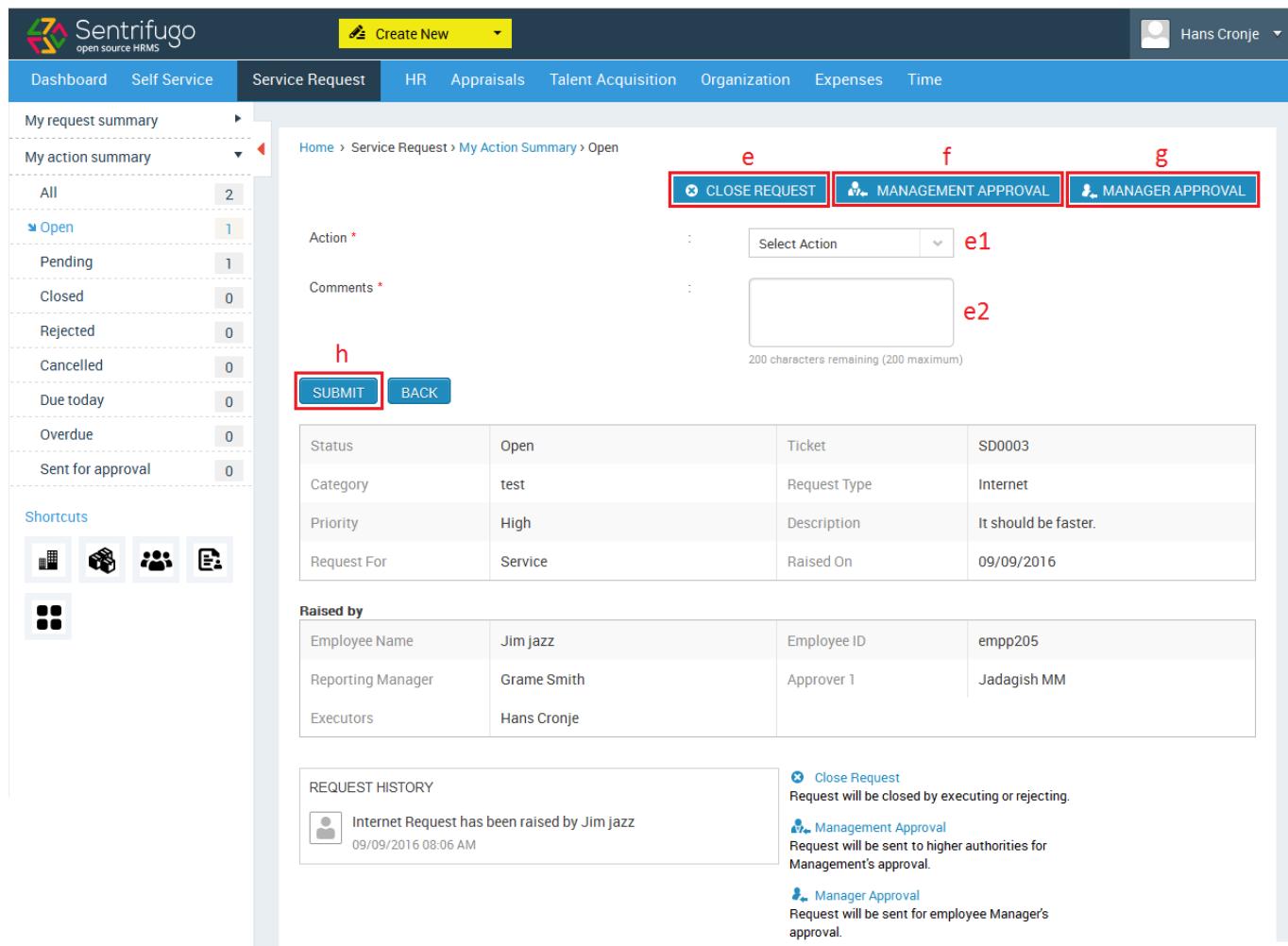
Figure 83

- 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



My request summary

My action summary

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

Shortcuts

Action \*

Comments \*

200 characters remaining (200 maximum)

**CLOSE REQUEST** **MANAGEMENT APPROVAL** **MANAGER APPROVAL**

**SUBMIT** **BACK**

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

Raised by

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

REQUEST HISTORY

Internet Request has been raised by Jim jazz  
09/09/2016 08:06 AM

**Close Request**  
Request will be closed by executing or rejecting.

**Management Approval**  
Request will be sent to higher authorities for Management's approval.

**Manager Approval**  
Request will be sent for employee Manager's approval.

Figure 84

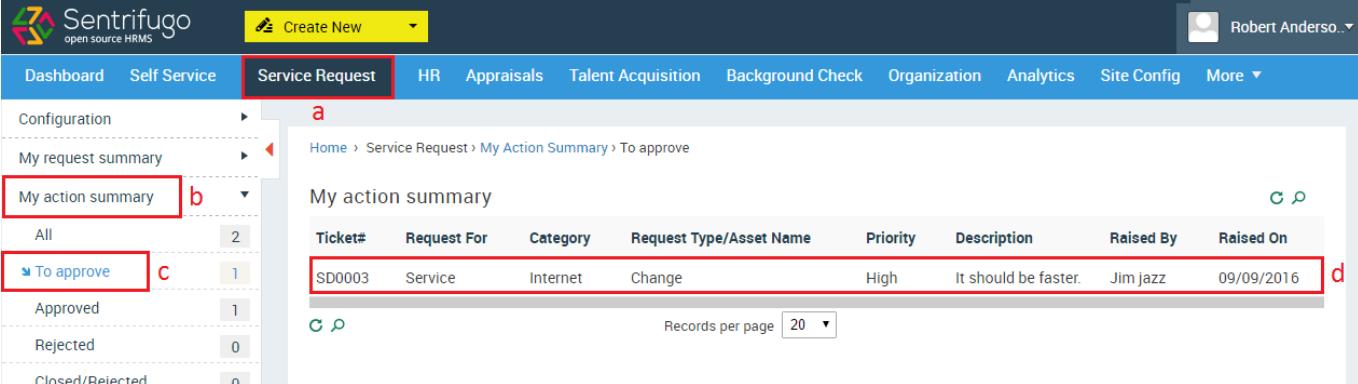
- e. Click **Close request** button to approve/reject the request.
  - e1. Select an action (Approve/Reject)
  - e2. Provide comments.
- f. Request **Management Approval** for the service request (They will be the approver(s) selected while configuring the Service Request Settings)
- g. Request **Manager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

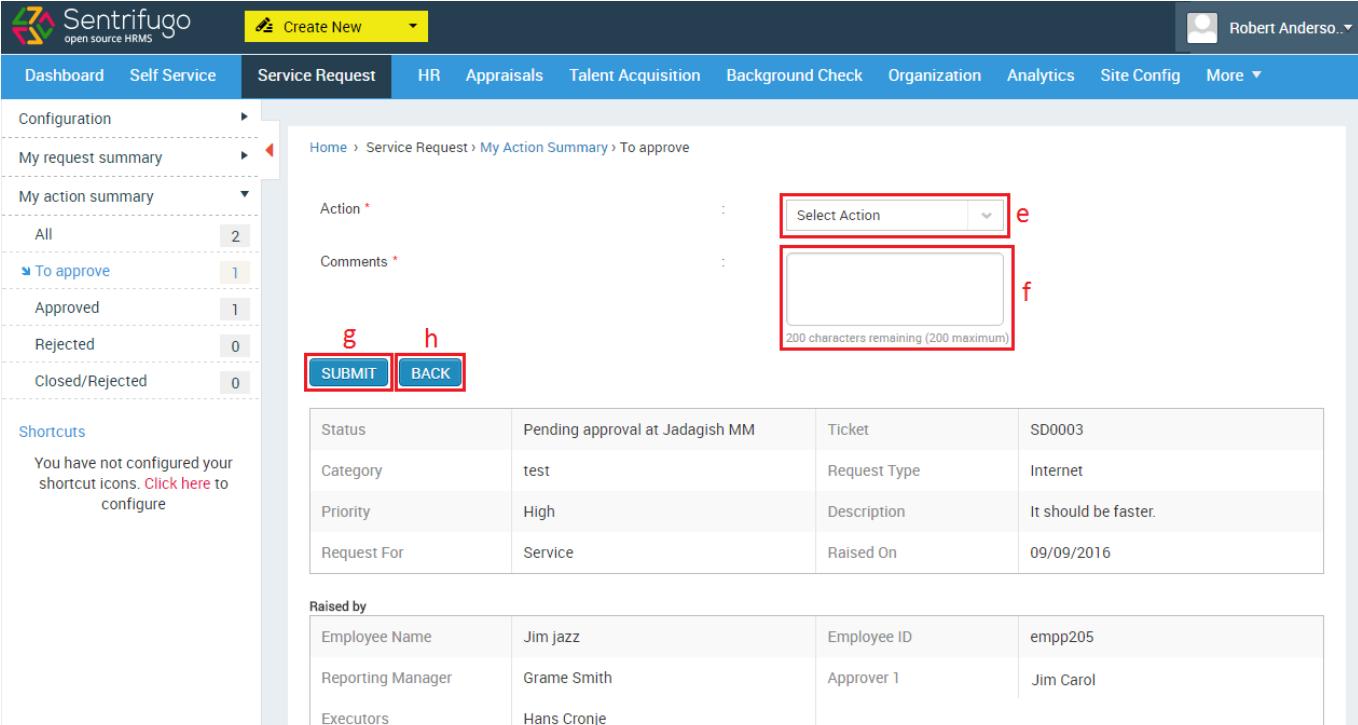


The screenshot shows the Sentrifugo web application interface. The top navigation bar includes links for Dashboard, Self Service, Service Request (which is highlighted in red), HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. A user profile for Robert Anderso is at the top right. The main content area has a breadcrumb path: Home > Service Request > My Action Summary > To approve. On the left, a sidebar titled 'My action summary' lists categories: All (2), To approve (1, highlighted with a red box labeled 'c'), Approved (1), Rejected (0), and Closed/Rejected (0). The main panel 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 shown: SD0003, Service, Internet, Change, High Priority, 'It should be faster.', Jim jazz, and 09/09/2016. Below the table are filters for 'C' and 'P' and a 'Records per page' dropdown set to 20. Red boxes labeled 'a', 'b', and 'd' are overlaid on the page.

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 Sentrifugo web application interface. The top navigation bar includes links for Dashboard, Self Service, Service Request (highlighted in blue), HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. A user profile for Robert Anderso is at the top right. The main content area has a breadcrumb path: Home > Service Request > My Action Summary > To approve. On the left, a sidebar titled 'My action summary' lists categories: All (2), To approve (1), Approved (1), Rejected (0), and Closed/Rejected (0). The main panel displays a form for approving a service request. It includes fields for 'Action \*' (with a dropdown menu 'Select Action' highlighted with a red box 'e') and 'Comments \*' (with a text area highlighted with a red box 'f'). Below the form are two buttons: 'SUBMIT' (highlighted with a red box 'g') and 'BACK' (highlighted with a red box 'h'). At the bottom, there are two tables: one for 'Status' and one for 'Raised by'. The 'Status' table shows: Pending approval at Jadagish MM, Ticket SD0003, Category test, Request Type Internet, Priority High, Description 'It should be faster.', Request For Service, and Raised On 09/09/2016. The 'Raised by' table shows: Employee Name Jim jazz, Reporting Manager Grame Smith, Executors Hans Cronje, Employee ID empp205, Approver 1 Jim Carol, and Raised On 09/09/2016. Red boxes labeled 'e', 'f', 'g', and 'h' are overlaid on the page.

Figure 86

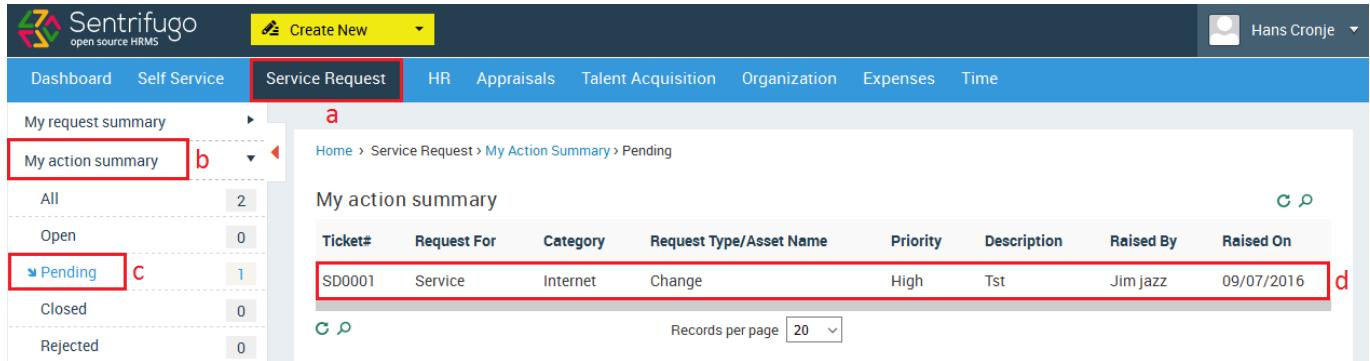
- Select any action (Approve/Reject)
- Provide comments
- Click **SUBMIT** button

- 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*



The screenshot shows the Sentrifugo application interface. The top navigation bar includes the logo, a 'Create New' button, and a user profile for 'Hans Cronje'. Below the navigation bar is a blue header with tabs: Dashboard, Self Service, Service Request (which is highlighted with a red box), HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. On the left, there's a sidebar with 'My request summary' and 'My action summary' sections. Under 'My action summary', there's a submenu with options: All (2), Open (0), Pending (1), Closed (0), and Rejected (0). The 'Pending' option is highlighted with a red box and labeled 'c'. The main content area shows a table titled 'My action summary' with one record:

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

Annotations: 'a' is above the main content area; 'b' is next to 'My action summary'; 'd' is at the bottom right of the table.

Figure 87

- Click **Service Request** in the top menu
- Click **My action summary** on the left menu panel
- Click **Pending** in the submenu
- 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 Talent Acquisition 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



g

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.

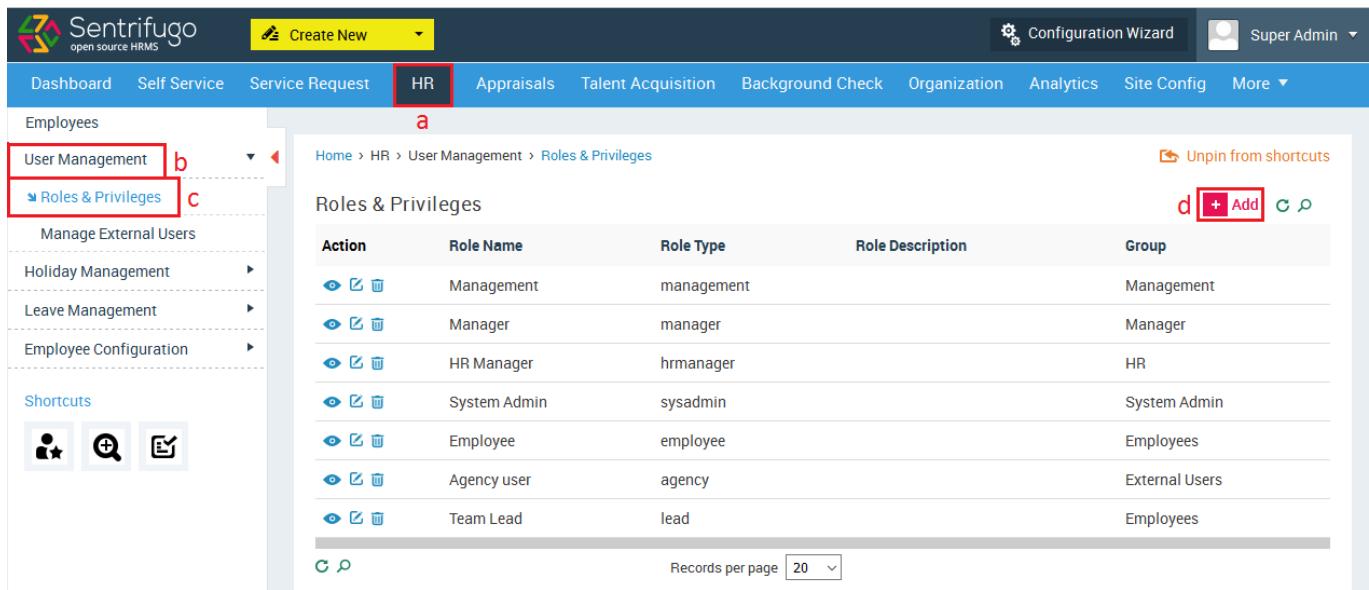
As mentioned earlier in section [1.1 What are the roles available in Sentrifugo?](#), there are 6 main role groups available by default in Sentrifugo:

- 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

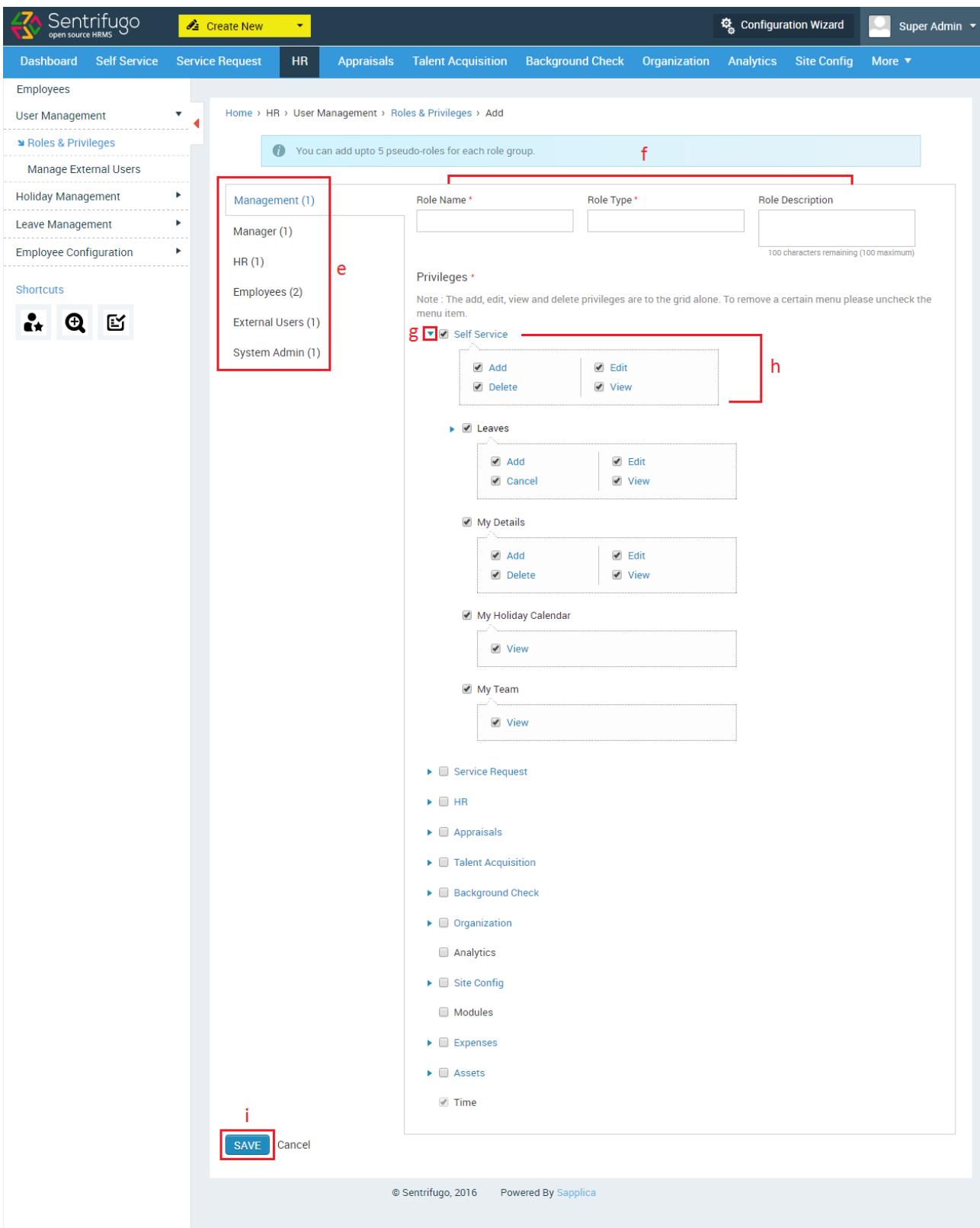


Action	Role Name	Role Type	Role Description	Group
	Management	management		Management
	Manager	manager		Manager
	HR Manager	hrmanager		HR
	System Admin	sysadmin		System Admin
	Employee	employee		Employees
	Agency user	agency		External Users
	Team Lead	lead		Employees

Figure 89

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

Please refer Figure 90



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**

**Privileges \***

Note : The add, edit, view and delete 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** Cancel

Figure 90

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

- i. Click **SAVE** button

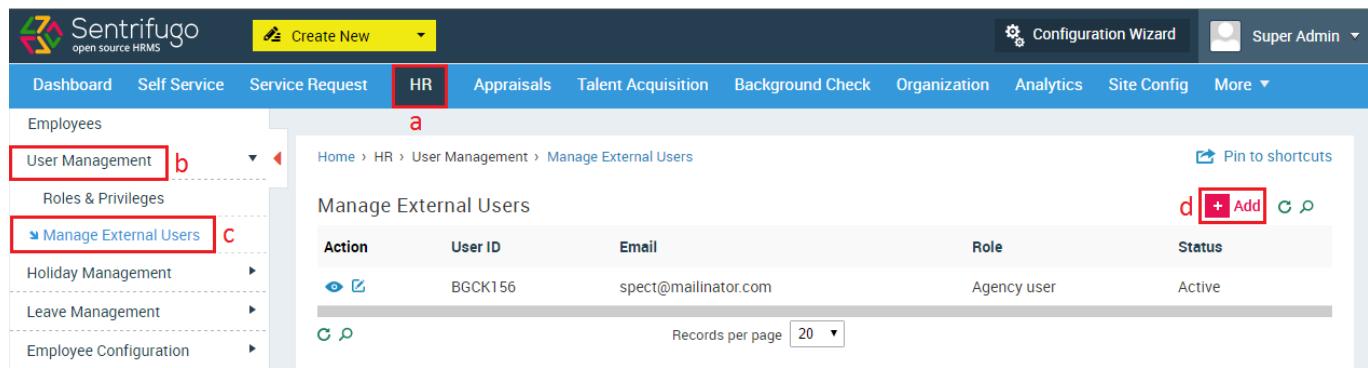
## 6.3 How do I add External Users?

External Users have limited access to information on Sentrifugo. There are 3 types of External Users in this application:

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

After adding an external user role (refer section [6.2 How do I manage Roles & Privileges?](#))

*Please refer Figure 91*

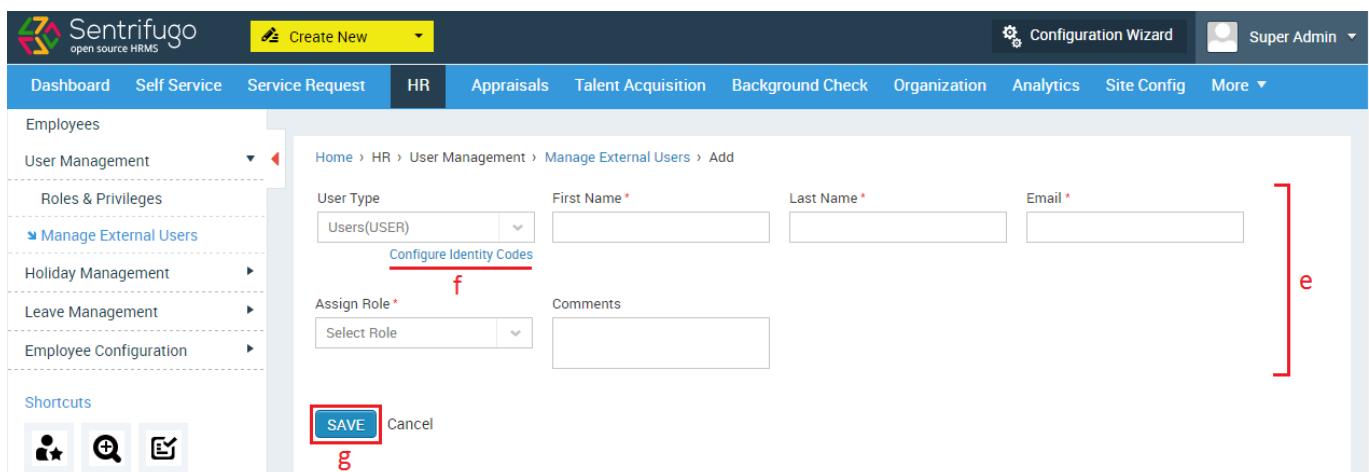


Action	User ID	Email	Role	Status
	BGCK156	spect@mailinator.com	Agency user	Active

Figure 91

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

*Please refer Figure 92*



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Create New, Configuration Wizard, Super Admin, and various HR modules like Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists categories such as Employees, User Management, Roles & Privileges, Manage External Users (which is currently selected), Holiday Management, Leave Management, Employee Configuration, and Shortcuts. The main content area displays a form titled 'Manage External Users > Add'. It requires input for 'First Name\*', 'Last Name\*', and 'Email\*'. Below these fields is a section for 'Configure Identity Codes' with a dropdown set to 'Users(USER)'. There is also a 'Comments' field and a 'Select Role' dropdown. At the bottom of the form are 'SAVE' and 'Cancel' buttons, with 'SAVE' being highlighted by a red box and arrow 'g'.

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

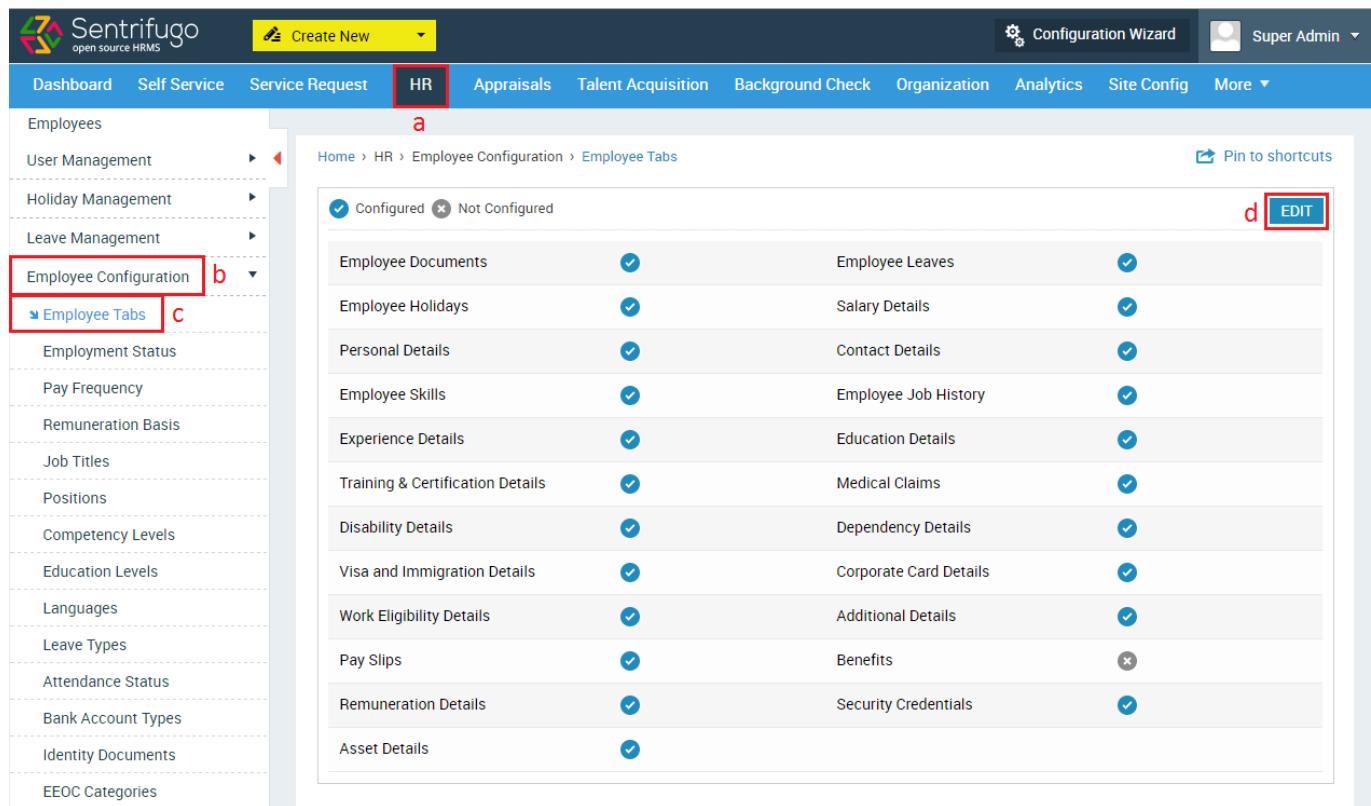
Please refer section [3. Leave Management](#)

## 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. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR (which is highlighted in red), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the far right of the top bar are 'Configuration Wizard' and 'Super Admin' dropdown menus.

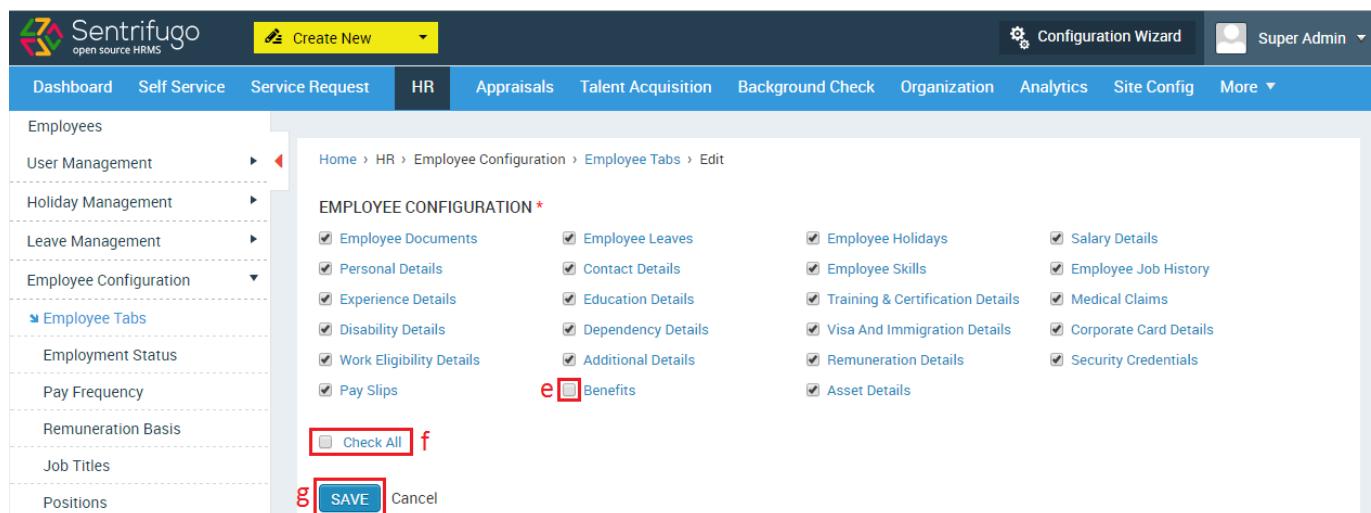
The main content area has a sidebar on the left containing various HR management categories like Employees, User Management, Holiday Management, Leave Management, Employee Configuration (highlighted with a red box), Employment Status, Pay Frequency, Remuneration Basis, Job Titles, Positions, Competency Levels, Education Levels, Languages, Leave Types, Attendance Status, Bank Account Types, Identity Documents, and EEOC Categories. Under 'Employee Configuration', 'Employee Tabs' is also highlighted with a red box.

The main panel displays a list of employee tabs under 'Employee Configuration > Employee Tabs'. It includes sections for Employee Documents, Employee Leaves, Employee Holidays, Salary Details, Personal Details, Contact Details, Employee Skills, Employee Job History, Experience Details, Education Details, Training & Certification Details, Medical Claims, Disability Details, Dependency Details, Visa and Immigration Details, Corporate Card Details, Work Eligibility Details, Additional Details, Pay Slips, Benefits, Remuneration Details, Security Credentials, and Asset Details. Each section has a checked or unchecked checkbox icon. A red box highlights the 'EDIT' button in the top right corner of this list.

Figure 93

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

Please refer Figure 94



This screenshot shows the 'Edit' view of the Employee Tabs configuration. The left sidebar and top navigation bar are identical to Figure 93. The main panel title is 'EMPLOYEE CONFIGURATION \*'. It lists various employee details with checkboxes for selection. The checkboxes are grouped into four columns:

- Employee Documents, Personal Details, Experience Details, Disability Details, Work Eligibility Details, Pay Slips (highlighted with a red box 'e'), Employee Leaves, Contact Details, Education Details, Dependency Details, Additional Details, Benefits (highlighted with a red box 'e'), Employee Holidays, Employee Skills, Training & Certification Details, Visa And Immigration Details, Remuneration Details, Asset Details, Salary Details, Employee Job History, Medical Claims, Corporate Card Details, and Security Credentials.

Below these checkboxes are two buttons: a red box highlights the 'Check All' checkbox and a blue box highlights the 'SAVE' button.

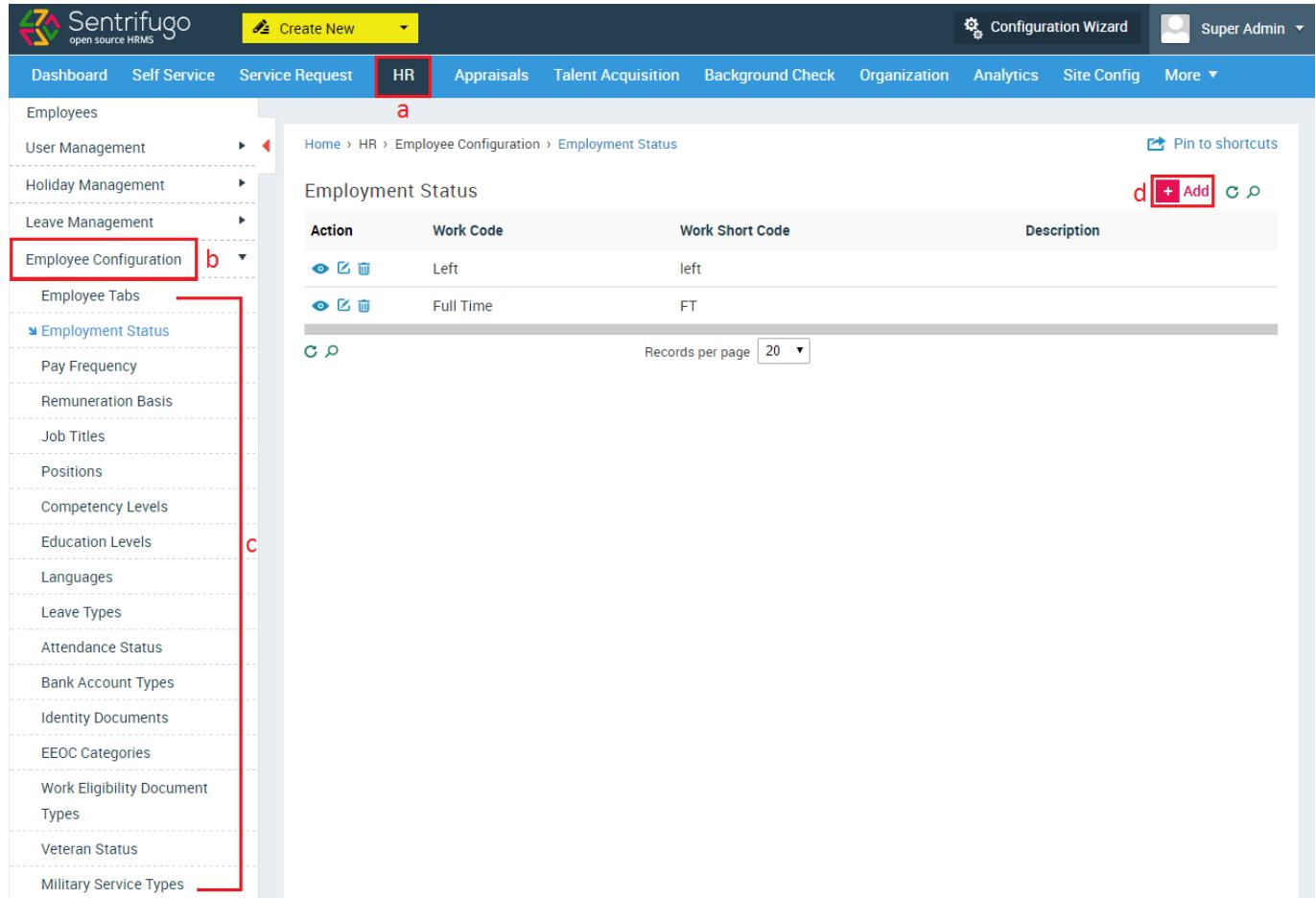
Figure 94

- 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 HRM system interface. At the top, there is a navigation bar with the Sentrifugo logo, a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. Below the navigation bar is a main menu with links to Dashboard, Self Service, Service Request, HR (which is highlighted with a red box and labeled 'a'), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More.

The left sidebar contains a tree view of configuration options. A red box labeled 'b' highlights the 'Employee Configuration' node under 'Employee Tabs'. A vertical red line labeled 'c' extends from this node down to the bottom of the sidebar, covering other options like Pay Frequency, Remuneration Basis, Job Titles, etc.

The central content area is titled 'Employment Status'. It displays a table with two rows of data:

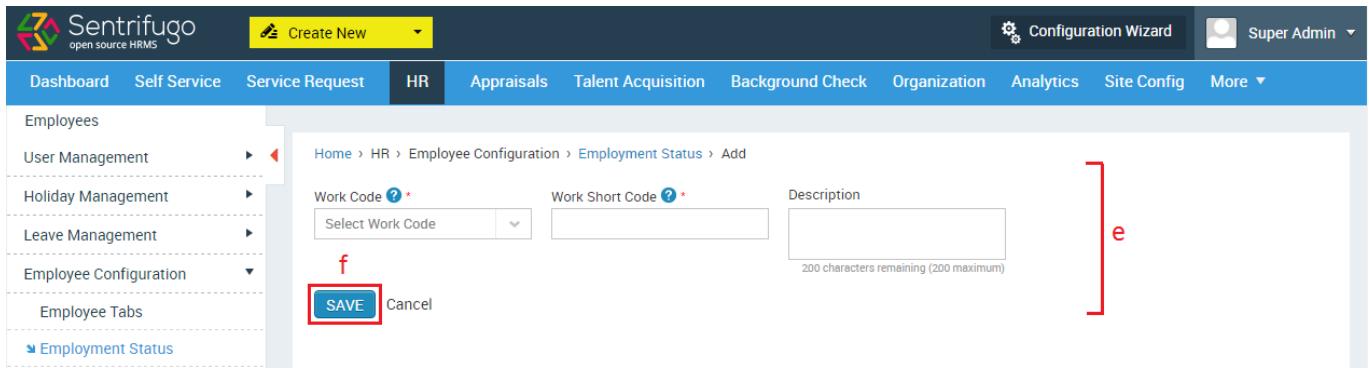
Action	Work Code	Work Short Code	Description
	Left	left	
	Full Time	FT	

At the bottom right of the content area, there are buttons for '+Add' (highlighted with a red box and labeled 'd') and a search icon. Below the table, there is a 'Records per page' dropdown set to 20.

Figure 95

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

*Please refer Figure 96*



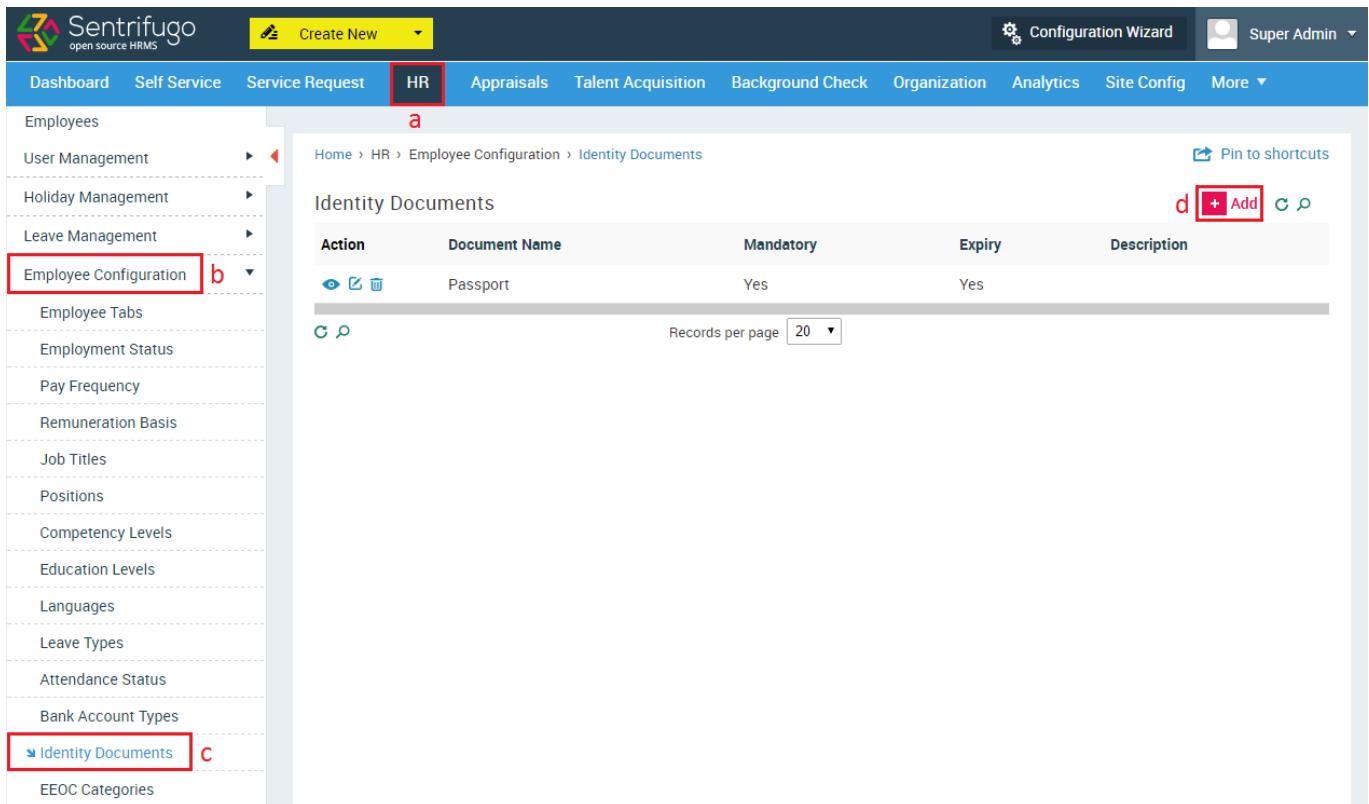
The screenshot shows the 'Employee Configuration > Employment Status > Add' screen. It includes fields for 'Work Code' (dropdown), 'Work Short Code' (text input), and 'Description' (text area). A red bracket 'e' points to the 'Description' field, and a red box 'f' points to the 'SAVE' button.

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*



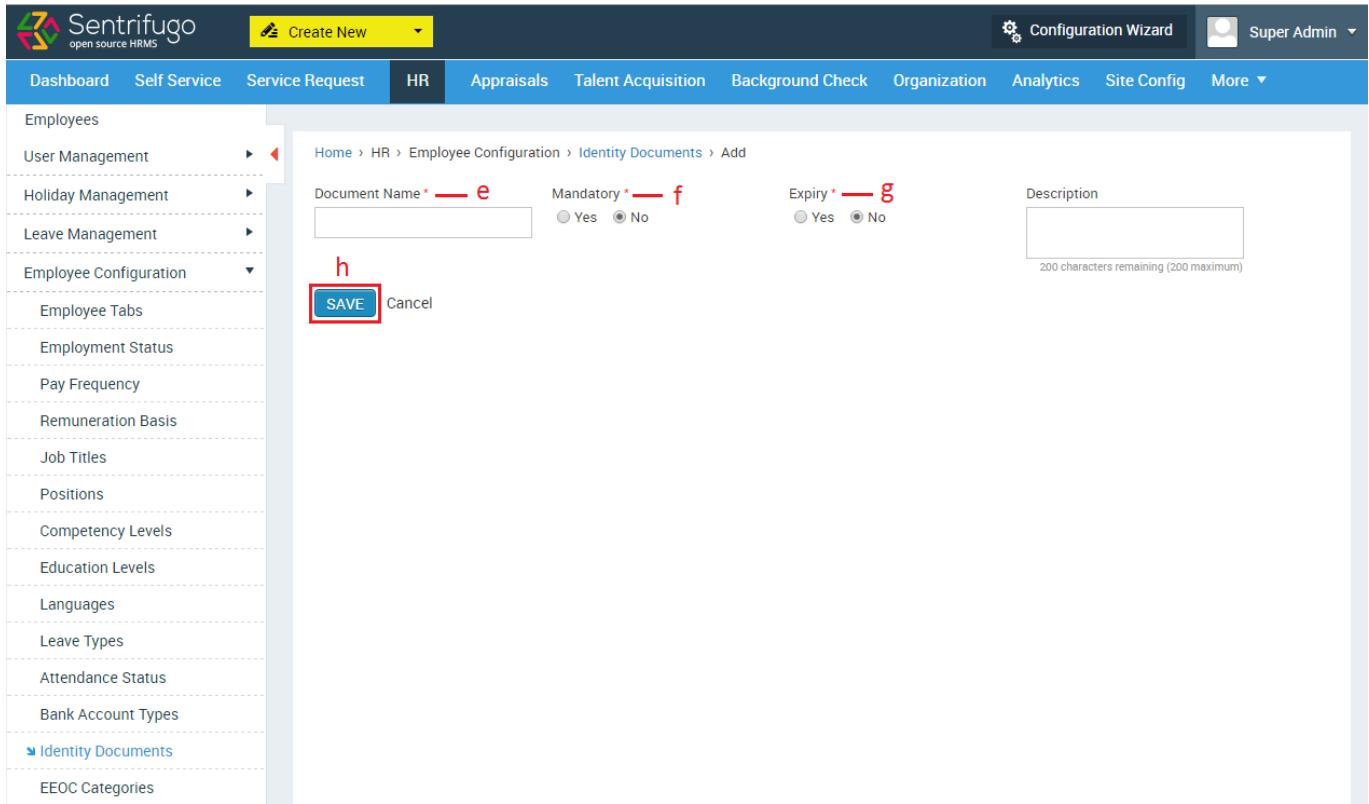
The screenshot shows the 'Employee Configuration > Identity Documents' screen. It displays a table of identity documents with columns for Action, Document Name, Mandatory, Expiry, and Description. A red box 'a' highlights the 'HR' menu item. A red box 'b' highlights the 'Employee Configuration' submenu item. A red box 'c' highlights the 'Identity Documents' submenu item. A red box 'd' highlights the '+Add' button.

Action	Document Name	Mandatory	Expiry	Description
	Passport	Yes	Yes	

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 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, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar under 'Employee Configuration' lists items like 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 (which is currently selected). The main content area shows a 'Home > HR > Employee Configuration > Identity Documents > Add' path. It contains fields for 'Document Name' (labeled e), 'Mandatory' (radio buttons for Yes or No) (labeled f), 'Expiry' (radio buttons for Yes or No) (labeled g), and a 'Description' text area with a character limit of 200 (labeled d). A 'SAVE' button (labeled h) is highlighted with a red box.

Figure 98

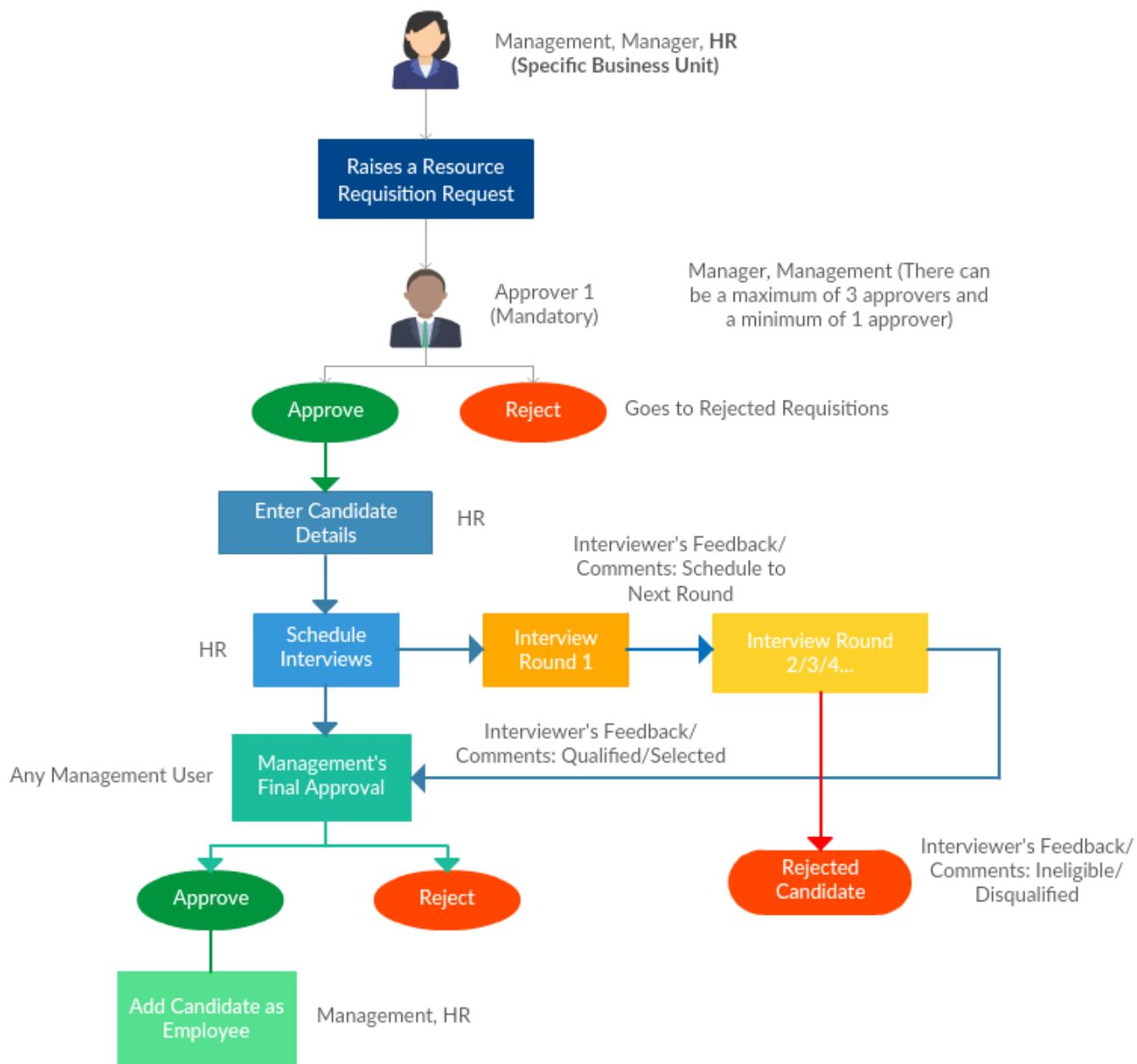
- e. Enter document name
- f. Select if you require a document to be mandatory or not
- g. Select if documents needs to have an expiry date
- h. Click **SAVE** button



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

## 7. Talent Acquisition

Talent Acquisition simplifies your hiring process by giving you the provision to initialize a requisition, manage candidate CVs, schedule interviews and shortlist/select candidates. Below is the talent acquisition process flowchart.



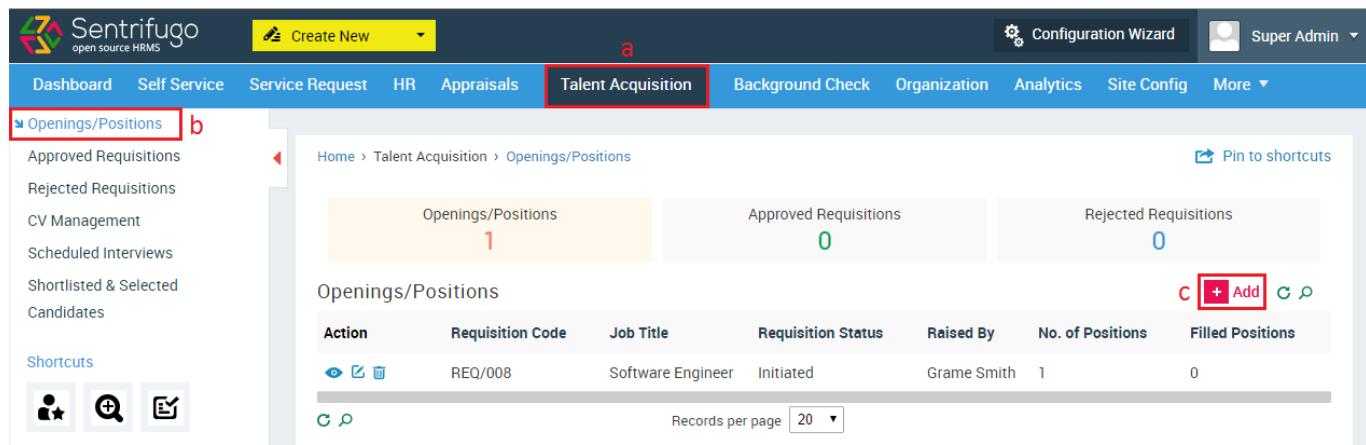
### Description:

- 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



The screenshot shows the Sentrifugo web interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, **Talent Acquisition**, Background Check, Organization, Analytics, Site Config, and More. A yellow button labeled 'Create New' is visible. On the left, a sidebar menu includes Openings/Positions (which is highlighted with a red box and labeled 'a'), Approved Requisitions, Rejected Requisitions, CV Management, Scheduled Interviews, Shortlisted & Selected Candidates, and Shortcuts. Below the sidebar is a search bar with three icons. The main content area shows a summary of openings: 'Openings/Positions' (1), 'Approved Requisitions' (0), and 'Rejected Requisitions' (0). Below this is a table titled 'Openings/Positions' with one record:

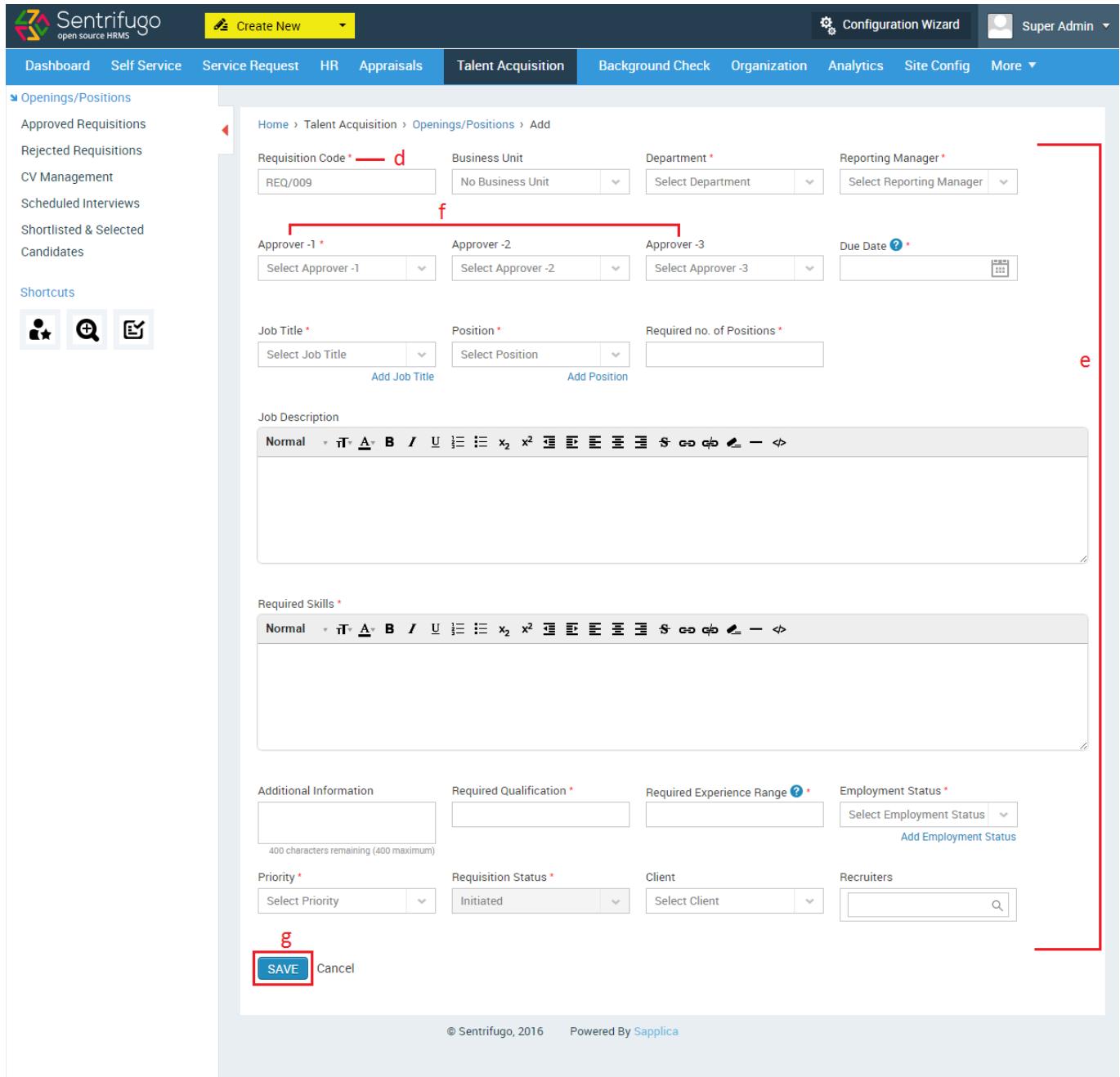
Action	Requisition Code	Job Title	Requisition Status	Raised By	No. of Positions	Filled Positions
	REQ/008	Software Engineer	Initiated	Grame Smith	1	0

At the bottom right of the main content area, there is a red box around the '+Add' button, labeled 'c'. The entire screenshot is labeled 'b' at the top left.

Figure 99

- Click **Talent Acquisition** in the top menu
- Click **Openings/Positions** on the left menu panel
- Click **+Add** button on the right side

Please refer Figure 100



The screenshot shows the Talent Acquisition module's 'Openings/Positions' section. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition (selected), Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists 'Approved Requisitions', 'Rejected Requisitions', 'CV Management', 'Scheduled Interviews', 'Shortlisted & Selected Candidates', and 'Shortcuts'. The main form has the following fields:

- Requisition Code \*** (highlighted by red box 'd'): REQ/009
- Business Unit**: No Business Unit
- Department \***: Select Department
- Reporting Manager \***: Select Reporting Manager
- Approver -1 \***, **Approver -2**, **Approver -3**: Select Approver dropdowns
- Due Date**: A date input field with a calendar icon.
- Job Title \***: Select Job Title dropdown
- Position \***: Select Position dropdown
- Required no. of Positions \***: An input field
- Add Job Title**: A link below the job title dropdown.
- Job Description**: A rich text editor with a toolbar.
- Required Skills \***: Another rich text editor with a toolbar.
- Additional Information**: A text area with a character count indicator (400 characters remaining).
- Required Qualification \***: A text area.
- Required Experience Range ? \***: A text area.
- Employment Status \***: Select Employment Status dropdown
- Add Employment Status**: A link next to the employment status dropdown.
- Priority \***: Select Priority dropdown
- Requisition Status \***: Initiated
- Client**: Select Client dropdown
- Recruiters**: A search input field.

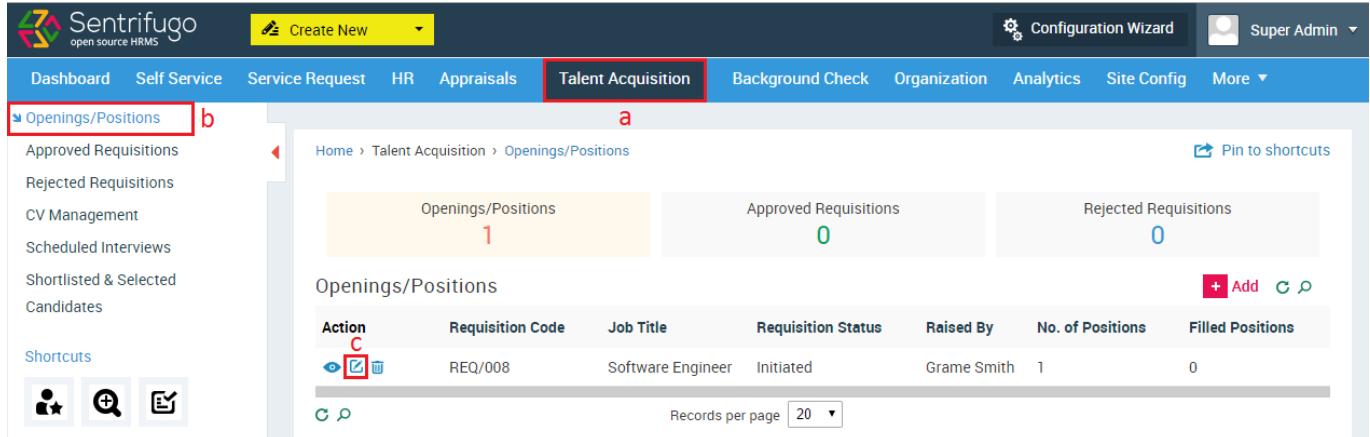
At the bottom are two buttons: **SAVE** (highlighted by red box 'g') and **Cancel**.

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

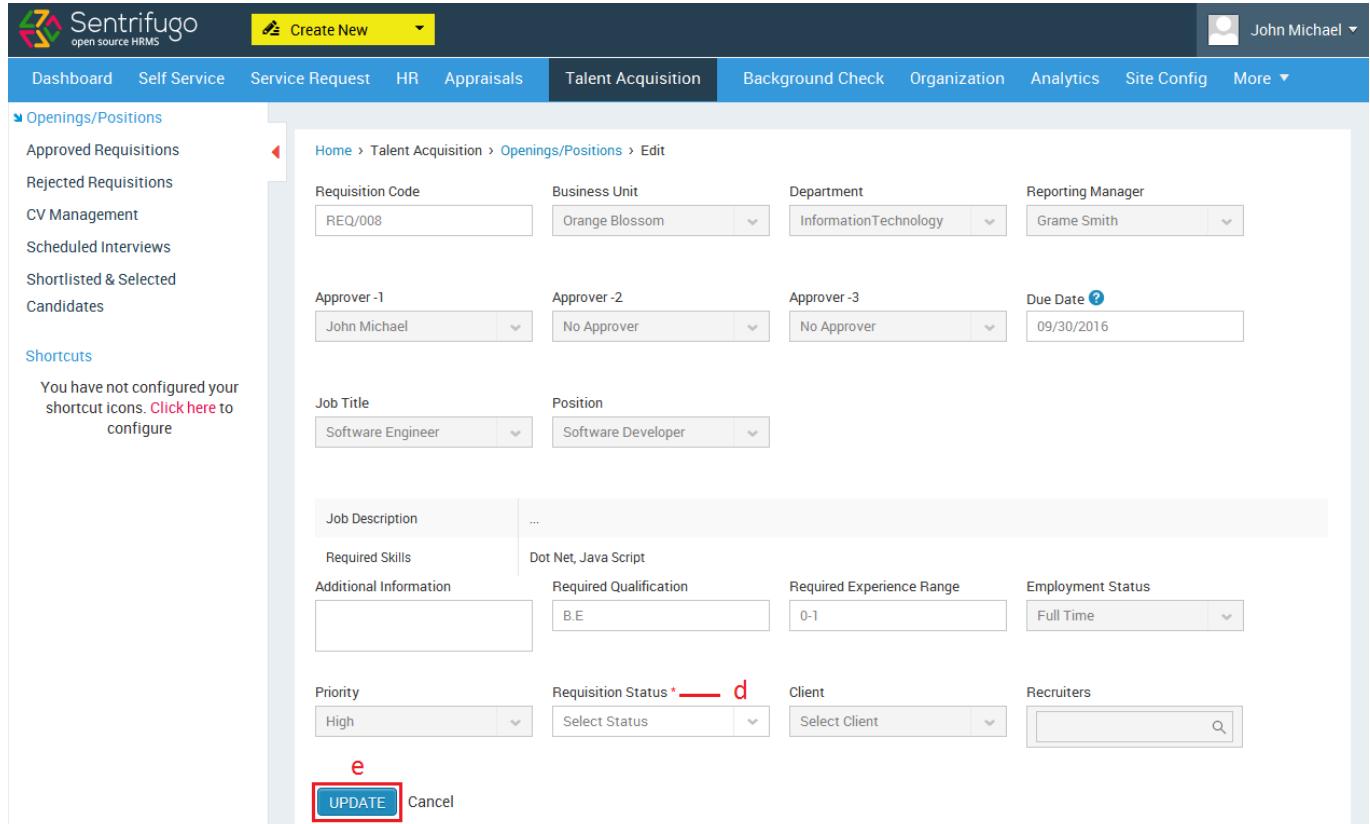


The screenshot shows the Talent Acquisition module of the Sentrifugo HRMS. The top navigation bar includes 'Create New', 'Configuration Wizard', 'Super Admin', and tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition (which is highlighted with a red box), Background Check, Organization, Analytics, Site Config, and More. A left sidebar menu has 'Openings/Positions' selected (highlighted with a red box). The main content area displays a summary of openings: 1 opening, 0 approved requisitions, and 0 rejected requisitions. Below this is a table for 'Openings/Positions' with one record: Requisition Code REQ/008, Job Title Software Engineer, Requisition Status Initiated, Raised By Grame Smith, No. of Positions 1, and Filled Positions 0. Action buttons for Edit (highlighted with a red box) and Delete are shown. The bottom of the screen shows standard UI elements like user profile, search, and refresh.

Figure 101

- Click **Talent Acquisition** 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' view for a requisition. The top navigation bar and sidebar are identical to Figure 101. The main form contains fields for Requisition Code (REQ/008), Business Unit (Orange Blossom), Department (InformationTechnology), Reporting Manager (Grame Smith), Approver-1 (John Michael), Approver-2 (No Approver), Approver-3 (No Approver), Due Date (09/30/2016), Job Title (Software Engineer), Position (Software Developer), 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 (Select Status), Client (Select Client), and Recruiters (Search field). The 'UPDATE' button at the bottom is highlighted with a red box.

Figure 102

- Select an action (**Approve/Reject**) in the field requisition status

- e. Click **UPDATE** button

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

*Please refer Figure 103*

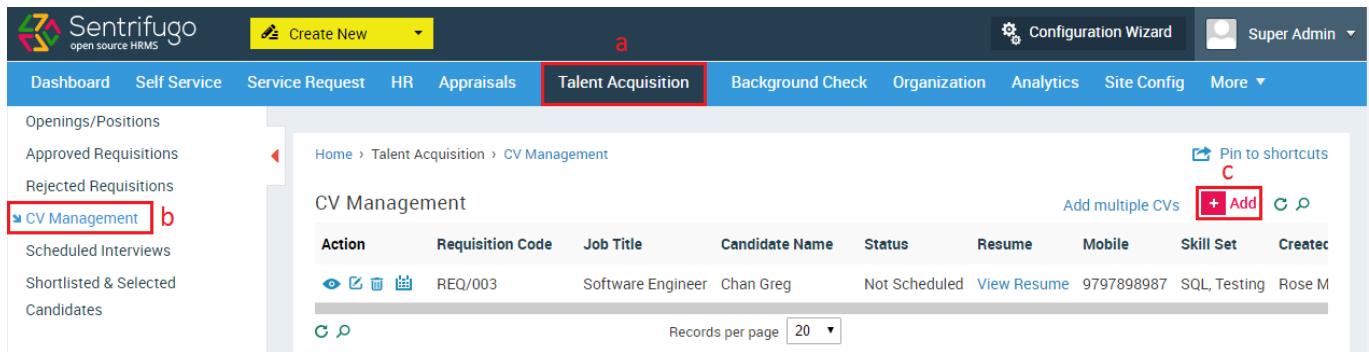


Figure 103

- a. Click **Talent Acquisition** in the top menu
- b. Click **CV Management** on the left side panel
- c. Click **+Add** button on the right side

*Please refer Figure 104*

Sentrifugo open source HRMS

Create New Configuration Wizard Super Admin ▾

Dashboard Self Service Service Request HR Appraisals **Talent Acquisition** Background Check Organization Analytics Site Config More ▾

Openings/Positions  
Approved Requisitions  
Rejected Requisitions  
CV Management  
Scheduled Interviews  
Shortlisted & Selected Candidates  
Shortcuts

Home > Talent Acquisition > CV Management > Add

Requisition ID \* **d** Status Candidate First Name \* Candidate Last Name \*

Select Requisition ID Not Scheduled

Source \* Email \* Contact Number \* Skill Set \*

Select Source

**f1** **f2**  
**UPLOAD RESUME** (OR) **ENTER CANDIDATE DETAILS**

Qualification \* Work Experience ? \* Education Summary Summary

Location \* Country \* State \* City \*

Select Country Select State Select City

Add Country Add State Add City

150 characters remaining (150 maximum)

Postal Code \*

PREVIOUS COMPANY DETAILS

Company 1	Company Name	Designation	From ?
Company 2			
Company 3	To ?	Contact Number	Web site
Address			

**g**  
**SAVE** **SAVE AND SCHEDULE** Cancel

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Figure 104

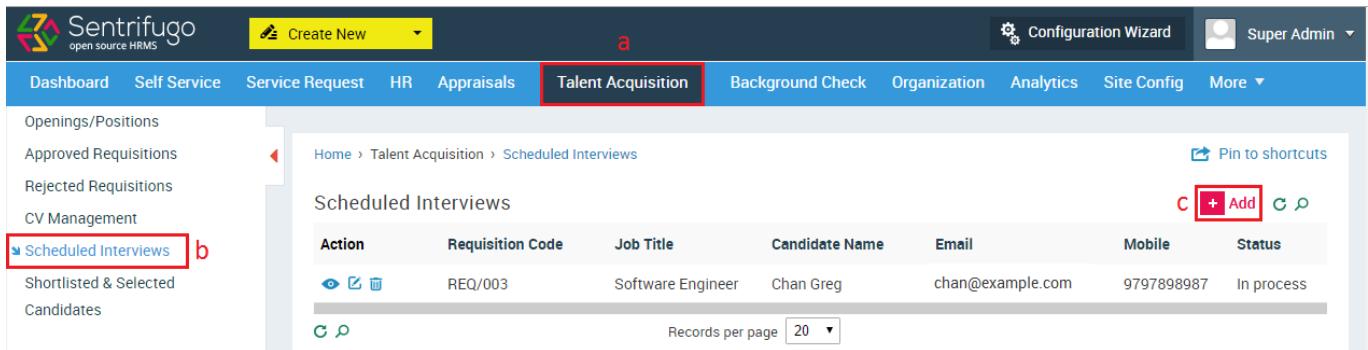
- d. Select the Requisition ID
- e. Enter Candidate's name
- f1.** Click to upload resume

Or

- f2.** Click here to enter candidate details in a form
- d. Click **SAVE** button

## 7.4 How do I Schedule an Interview?

Please refer Figure 105

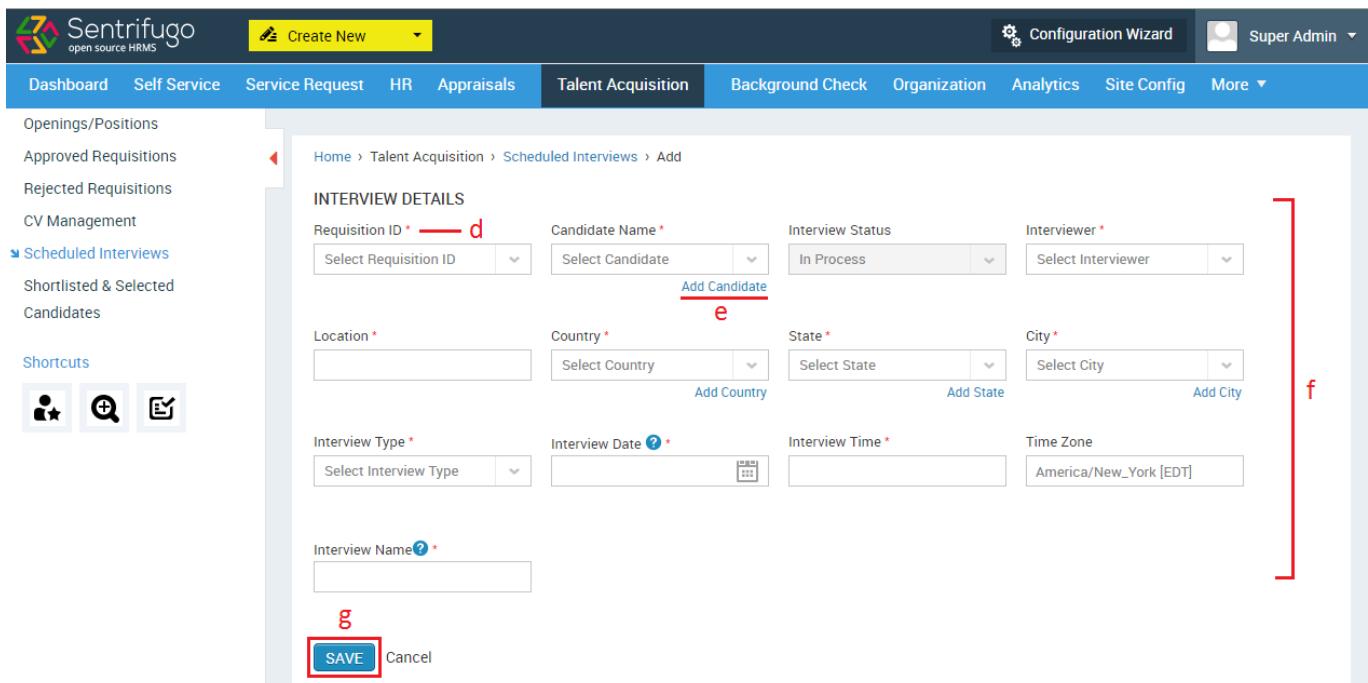


The screenshot shows the Talent Acquisition module. The top navigation bar has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, **Talent Acquisition**, Background Check, Organization, Analytics, Site Config, and More. The 'Talent Acquisition' tab is highlighted with a red box. The left sidebar has links for Openings/Positions, Approved Requisitions, Rejected Requisitions, CV Management, and **Scheduled Interviews**, which is also highlighted with a red box. The main content area shows a table titled 'Scheduled Interviews' with columns: Action, Requisition Code, Job Title, Candidate Name, Email, Mobile, and Status. One row is visible: Requisition ID REQ/003, Job Title Software Engineer, Candidate Name Chan Greg, Email chan@example.com, Mobile 9797898987, and Status In process. There are buttons for +Add, Pin to shortcuts, and a search icon.

Figure 105

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

Please refer Figure 106



The screenshot shows the 'Add' form for scheduling an interview. The top navigation bar and sidebar are identical to Figure 105. The main content area is titled 'INTERVIEW DETAILS'. It contains fields for Requisition ID (with a dropdown labeled 'd'), Candidate Name (with a dropdown labeled 'e'), Interview Status (In Process), Interviewer (Select Interviewer dropdown), Location (text input), Country (dropdown), State (dropdown), City (dropdown), Interview Type (dropdown), Interview Date (calendar input), Interview Time (text input), and Time Zone (America/New\_York [EDT]). Below these fields are 'Interview Name' (text input) and a 'SAVE' button with a red box around it. A red bracket 'f' points to the right side of the form, and a red label 'g' points to the 'SAVE' button.

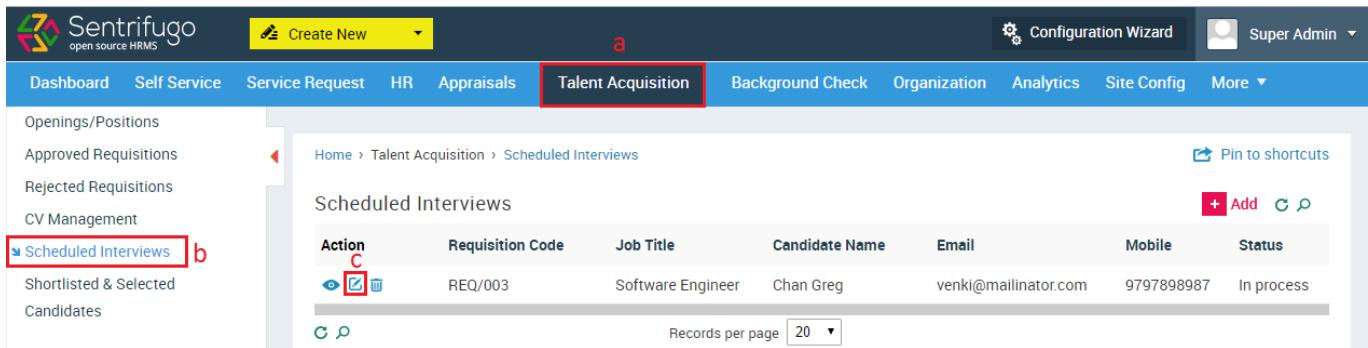
Figure 106

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

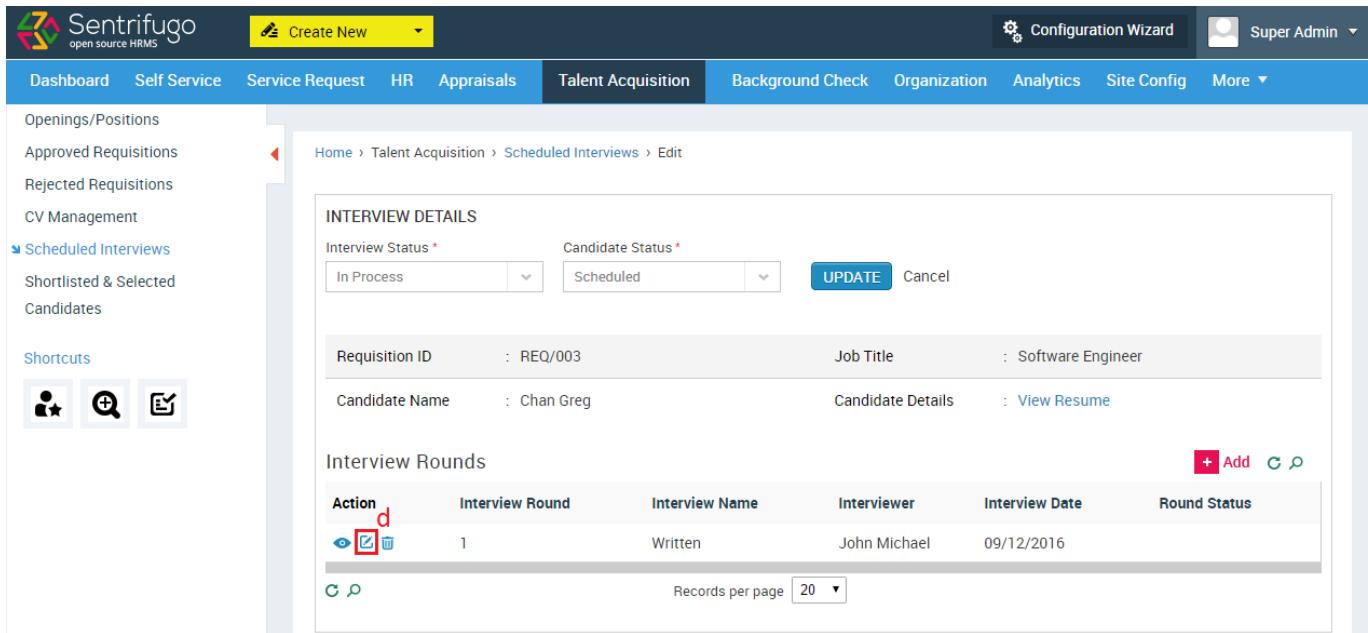


The screenshot shows the Sentrifugo web interface. The top navigation bar includes 'Create New' (highlighted with a yellow box), 'Configuration Wizard', 'Super Admin', and other menu items like 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Talent Acquisition' (highlighted with a red box), 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. On the left, a sidebar has 'Scheduled Interviews' (highlighted with a red box) selected. The main content area displays a table titled 'Scheduled Interviews' with columns: Action (with icons for eye, edit, and delete), Requisition Code (REQ/003), Job Title (Software Engineer), Candidate Name (Chan Greg), Email (venki@mailinator.com), Mobile (9797898987), and Status (In process). There are also 'Add', 'Edit', and search/pin icons.

Figure 107

- Click **Talent Acquisition** menu option
- Click **Scheduled Interviews** on the left side panel
- Click **Edit** icon against an interview

Please refer Figure 108



This screenshot shows the 'Edit' view for a scheduled interview. The top navigation and sidebar are identical to Figure 107. The main content area has a heading 'INTERVIEW DETAILS' with fields for Interview Status (In Process) and Candidate Status (Scheduled), along with 'UPDATE' and 'Cancel' buttons. Below this is a table with columns: Requisition ID (REQ/003), Job Title (Software Engineer), Candidate Name (Chan Greg), and Candidate Details (View Resume). A section titled 'Interview Rounds' follows, with a table showing one round: Interview Round (1), Interview Name (Written), Interviewer (John Michael), Interview Date (09/12/2016), and Round Status. Icons for 'Add', 'Edit', and search are present.

Figure 108

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

Please refer Figure 109

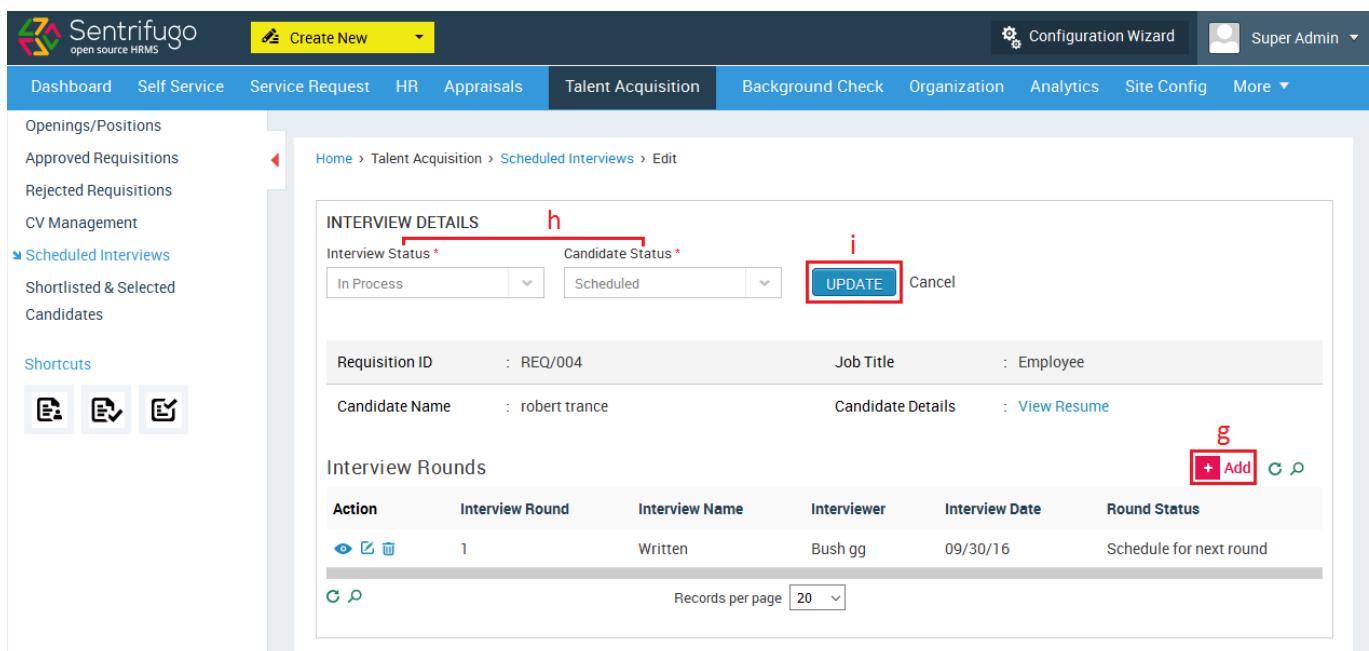
**Interview Rounds**

Interviewer *	Location *	Country *
Johnson Andrew , Manag...	Brooklyn	United States
State *	City *	Interview Type *
California	Berkeley	In Person
Interview Date ? *	Interview Time *	Time Zone
09/30/16	01:00 PM	America/Antigua [AST]
Interview Name?	Interviewer Feedback	Interviewer Comments
Written		
Result Status *	e	
Select Status		
<b>f</b>		
<b>UPDATE</b>	Cancel	

Figure 109

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

*Please refer Figure 110*



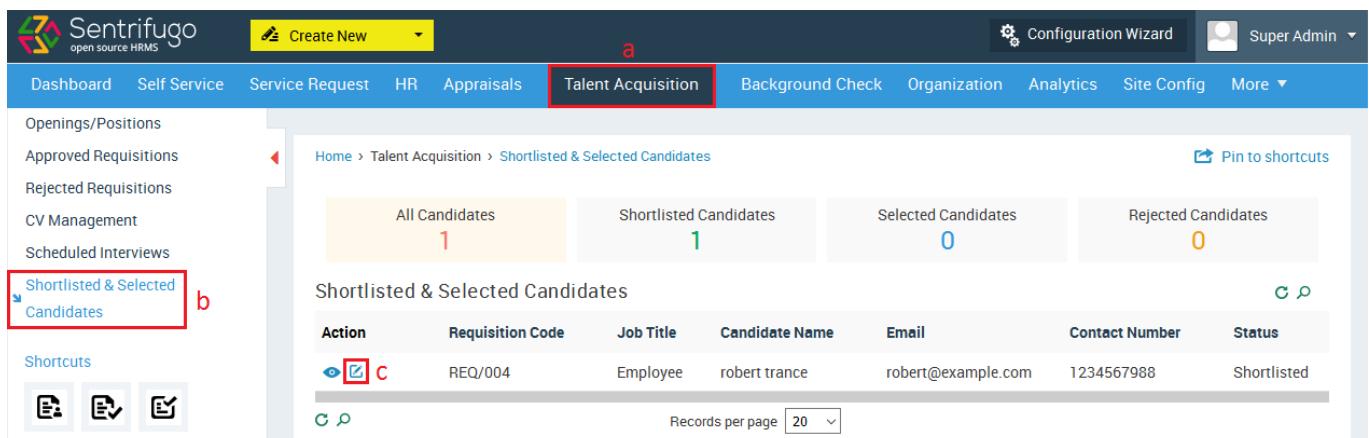
The screenshot shows the Talent Acquisition module of the Sentrifugo HRMS. The top navigation bar includes links for Create New, Configuration Wizard, Super Admin, and various system settings. The main menu has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition (which is active), Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists Openings/Positions, Approved Requisitions, Rejected Requisitions, CV Management, Scheduled Interviews (selected), Shortlisted & Selected Candidates, and Shortcuts. The main content area displays 'INTERVIEW DETAILS' for a candidate named Robert Trance, showing Interview Status as 'In Process' and Candidate Status as 'Scheduled'. An 'UPDATE' button is highlighted with a red box. Below this, a table shows Interview Rounds: Round 1 is listed as 'Written' by 'Bush gg' on '09/30/16' with a status of 'Schedule for next round'. A red box highlights the '+Add' button in the table header. The bottom of the screen shows pagination controls.

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*



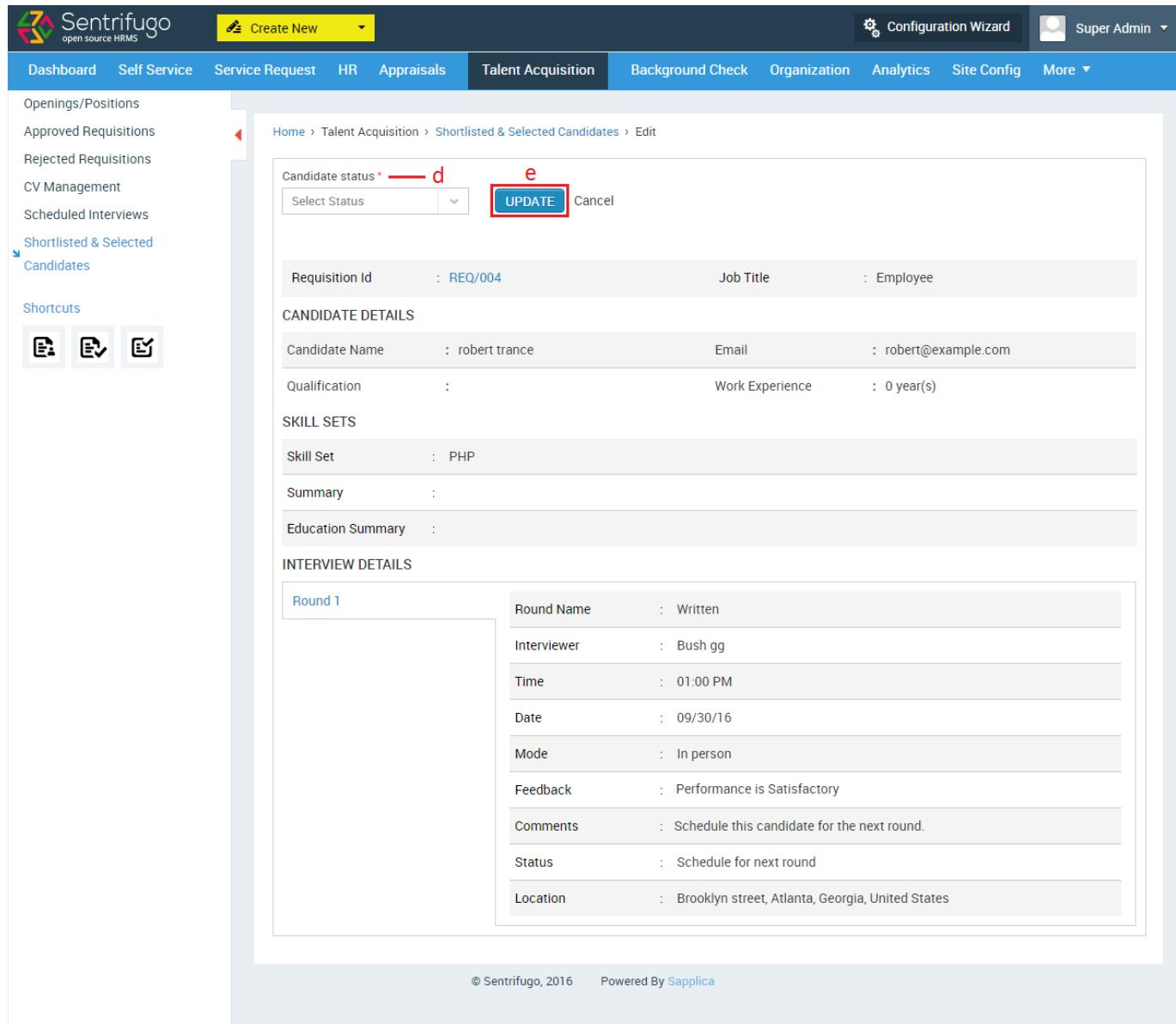
The screenshot shows the Talent Acquisition module of the Sentrifugo HRMS. The top navigation bar includes links for Create New, Configuration Wizard, Super Admin, and various system settings. The main menu has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition (which is active), Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists Openings/Positions, Approved Requisitions, Rejected Requisitions, CV Management, Scheduled Interviews, and Shortlisted & Selected Candidates (selected). The main content area displays a summary of candidate counts: All Candidates (1), Shortlisted Candidates (1), Selected Candidates (0), and Rejected Candidates (0). Below this, a table lists the 'Shortlisted & Selected Candidates': Robert Trance, Employee, REQ/004, robert@example.com, 1234567988, and Status 'Shortlisted'. A red box highlights the 'Shortlisted & Selected Candidates' link in the sidebar and the 'C' icon in the table's action column. The bottom of the screen shows pagination controls.

Figure 111

- a. Click **Talent Acquisition** 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 Talent Acquisition module of the Sentrifugo system. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition (which is active), Background Check, Organization, Analytics, Site Config, More, Configuration Wizard, and Super Admin.

The left sidebar has a tree view with nodes like Openings/Positions, Approved Requisitions, Rejected Requisitions, CV Management, Scheduled Interviews, Shortlisted & Selected Candidates (which is selected), and Shortcuts. The Shortcuts section contains three icons: a person icon, a document icon, and a mail icon.

The main content area shows a form for editing a candidate. The top part of the form has a 'Candidate status' dropdown with a red box around it and the label 'd'. To its right is an 'UPDATE' button with a red box around it and the label 'e'. Below this are sections for Candidate Details, Skill Sets, and Interview Details.

**Candidate Details:**

- Requisition Id : REQ/004
- Job Title : Employee
- Candidate Name : robert trance
- Email : robert@example.com
- Qualification :
- Work Experience : 0 year(s)

**Skill Sets:**

- Skill Set : PHP
- Summary :
- Education Summary :

**Interview Details:**

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	

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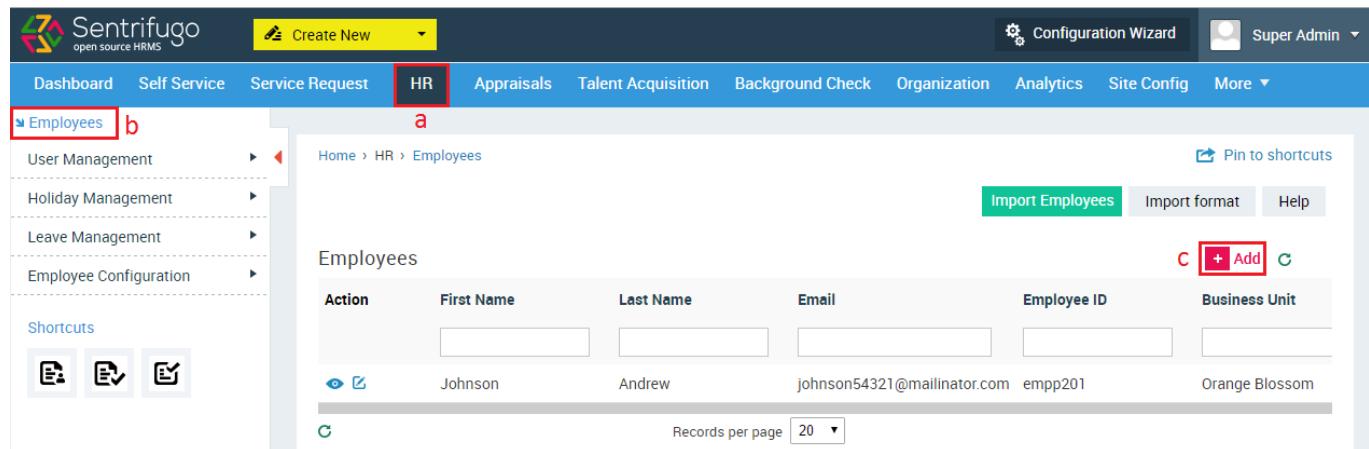
Figure 112

- 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*

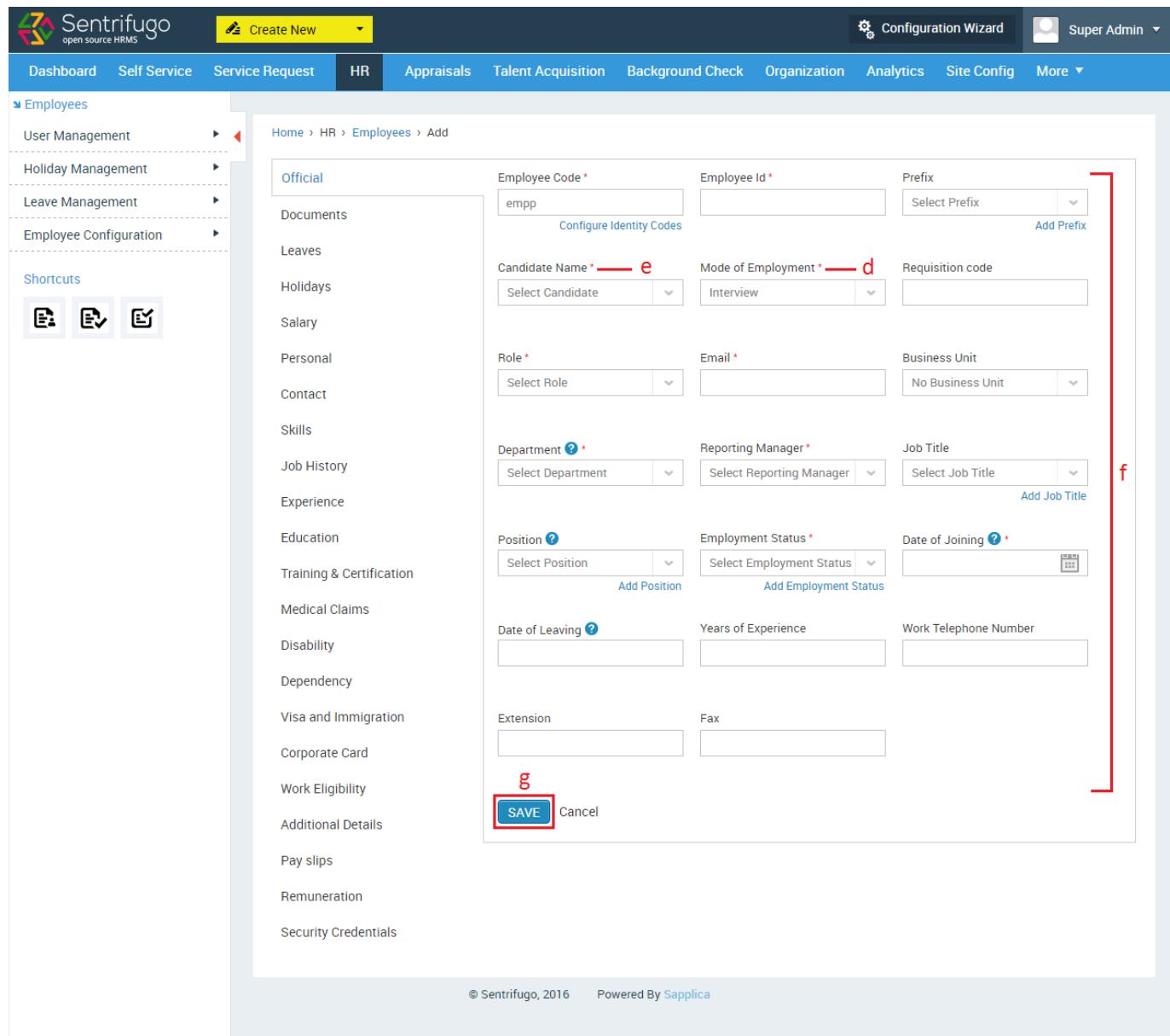


Action	First Name	Last Name	Email	Employee ID	Business Unit
	Johnson	Andrew	johnson54321@mailinator.com	empp201	Orange Blossom

Figure 113

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

Please refer Figure 114



The screenshot shows the 'Employees' section of the Sentrifugo HRM system. The top navigation bar includes 'Create New', 'Configuration Wizard', 'Super Admin', and a 'More' dropdown. The main menu has tabs for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists various employee management modules like User Management, Holiday Management, Leave Management, and Employee Configuration, along with Shortcuts for common tasks.

The central 'Add' form for an employee is displayed. It requires several fields to be filled out:

- Official:** Employee Code \* (empp), Employee Id \*, Prefix (Select Prefix, Add Prefix)
- Candidate Information:** Candidate Name \* (highlighted with a red border, labeled 'e'), Mode of Employment \* (Interview, labeled 'd'), Requisition code (Select Candidate, Interview)
- Role and Contact:** Role \* (Select Role), Email \*, Business Unit (No Business Unit)
- Department and Job Title:** Department (Select Department), Reporting Manager (Select Reporting Manager), Job Title (Select Job Title, Add Job Title)
- Employment Details:** Position (Select Position, Add Position), Employment Status (Select Employment Status, Add Employment Status), Date of Joining (Date input field, labeled 'f')
- Personal Details:** Date of Leaving, Years of Experience, Work Telephone Number, Extension, Fax
- Buttons:** SAVE (highlighted with a red border, labeled 'g') and Cancel

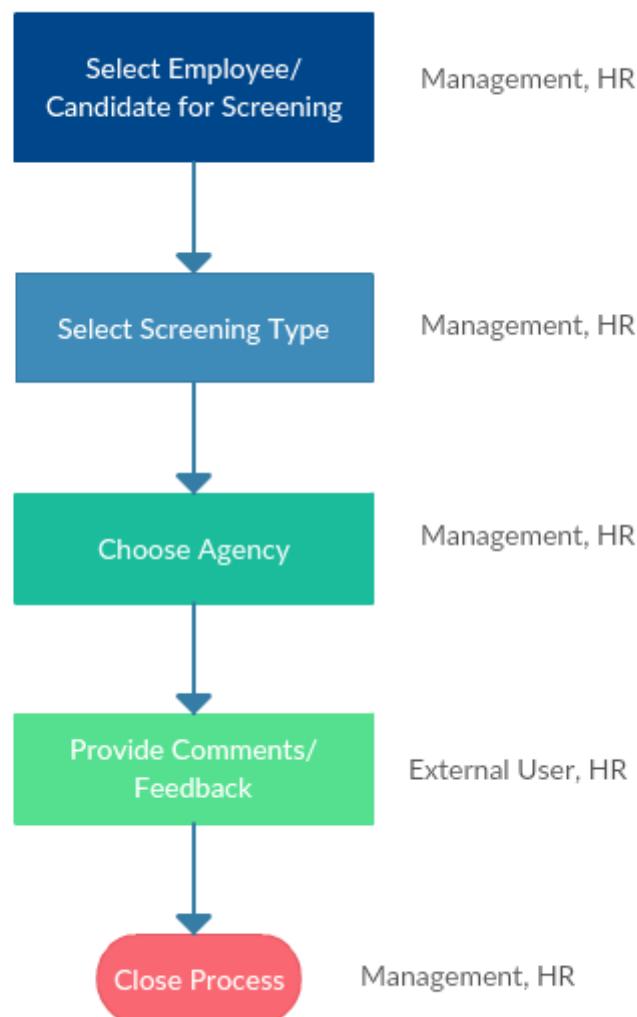
At the bottom of the form, there are copyright notices: © Sentrifugo, 2016 and Powered By Sapplica.

Figure 114

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

## 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.

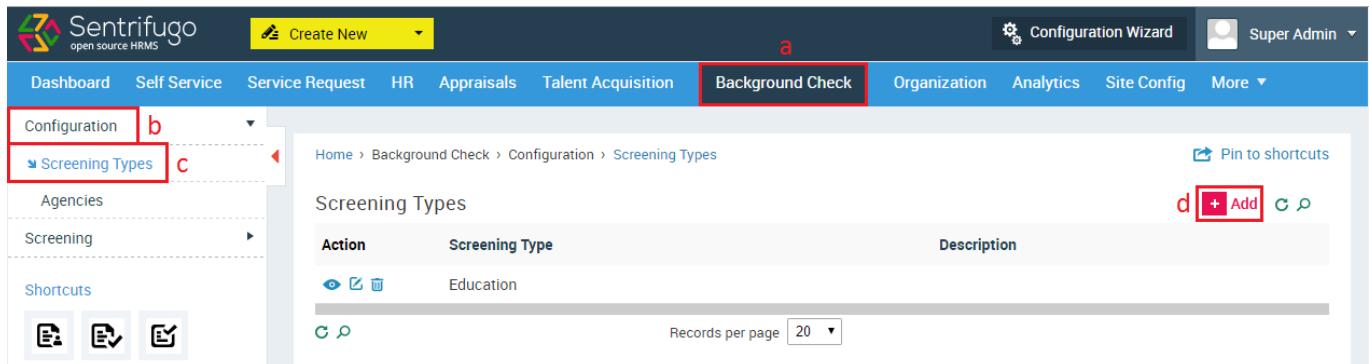


### Description:

- 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



Action	Screening Type	Description
	Education	

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

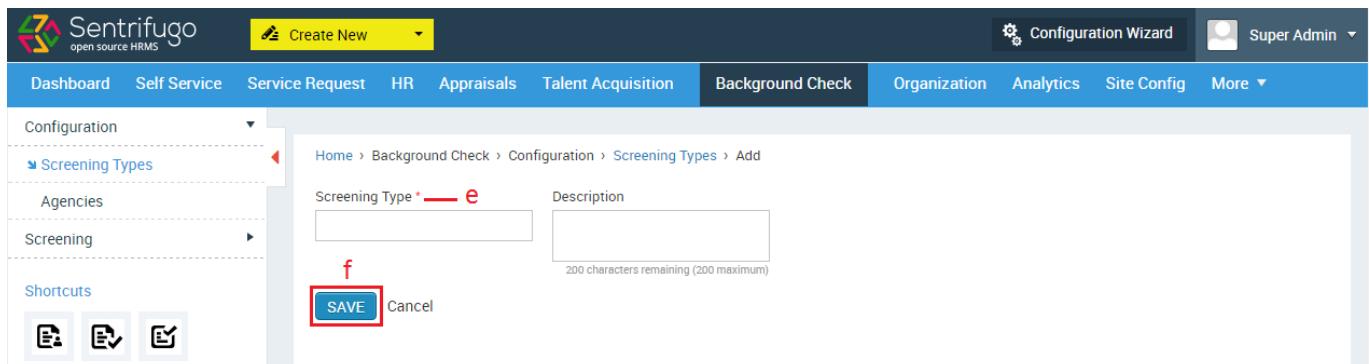
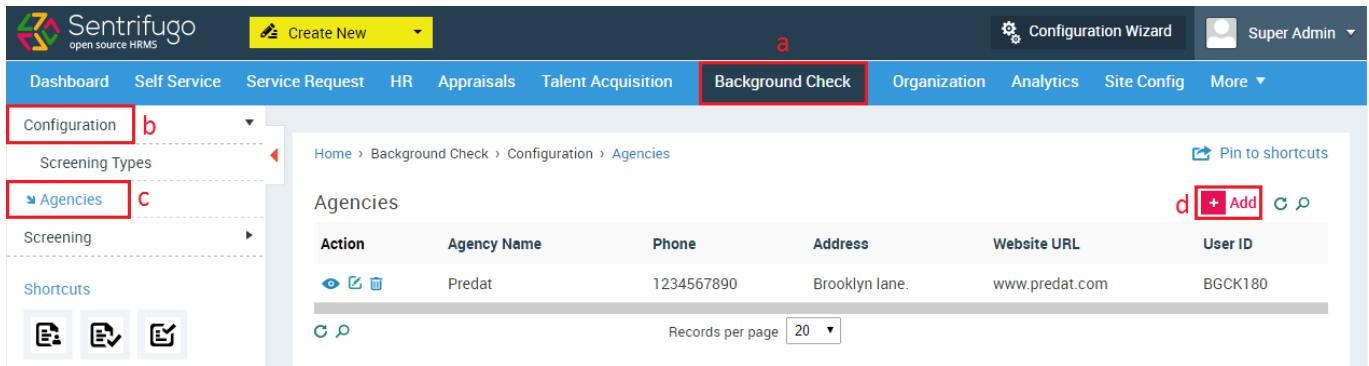


Figure 116

- 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

Sentrifugo open source HRMS

Create New Configuration Wizard Super Admin

Dashboard Self Service Service Request HR Appraisals Talent Acquisition Background Check Organization Analytics Site Config More ▾

Configuration

Screening Types Agencies Screening Shortcuts

Home > Background Check > Configuration > Agencies > Add

Agency Name \* Website URL \* Primary Phone \* Secondary Phone

Screening Type \* Address \*

Add Screening Type

POC DETAILS

Contact 1 First Name \* Last Name \* Mobile \*

Contact 2

Contact 3 Email \* Location \* Country \*

Select Country Add Country

State \* City \* Contact type \*

Select State Add State Select City Add City Primary

Contact type \* — g

Select Role

h SAVE Cancel

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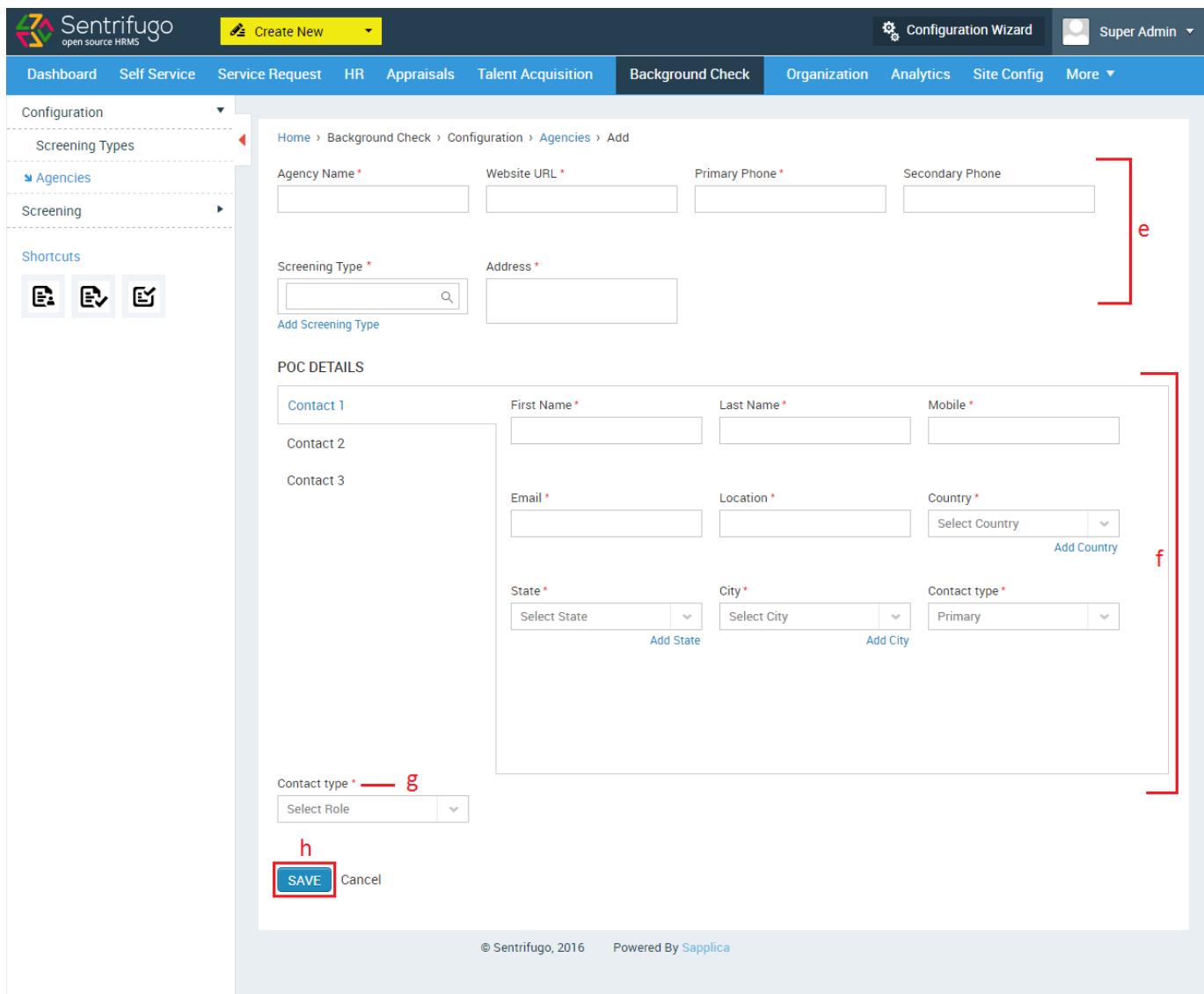
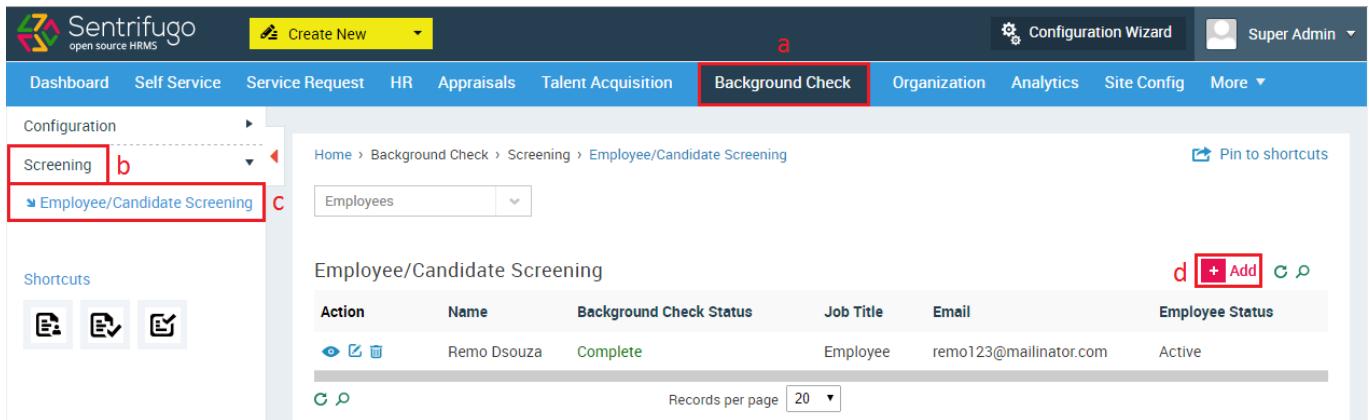


Figure 118

- 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



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

Figure 119

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

Please refer Figure 120

Sentrifugo open source HRMS

Create New Configuration Wizard Super Admin

Dashboard Self Service Service Request HR Appraisals Talent Acquisition Background Check Organization Analytics Site Config More ▾

Configuration Screening Employee/Candidate Screening

Shortcuts

Home > Background Check > Screening > Employee/Candidate Screening > Add

Select Employee / Candidate \* — e  
Select Employee/Candid...

SCREENING TYPES \* — f  
 Education

CHOOSE AGENCY \* — g  
Predat

Contact 1 (Primary)  
Kevin K Atlanta,  
1234567888, Atlanta,  
Georgia, United States  
Email : kevin123@mailinator.com

h  
SAVE Cancel

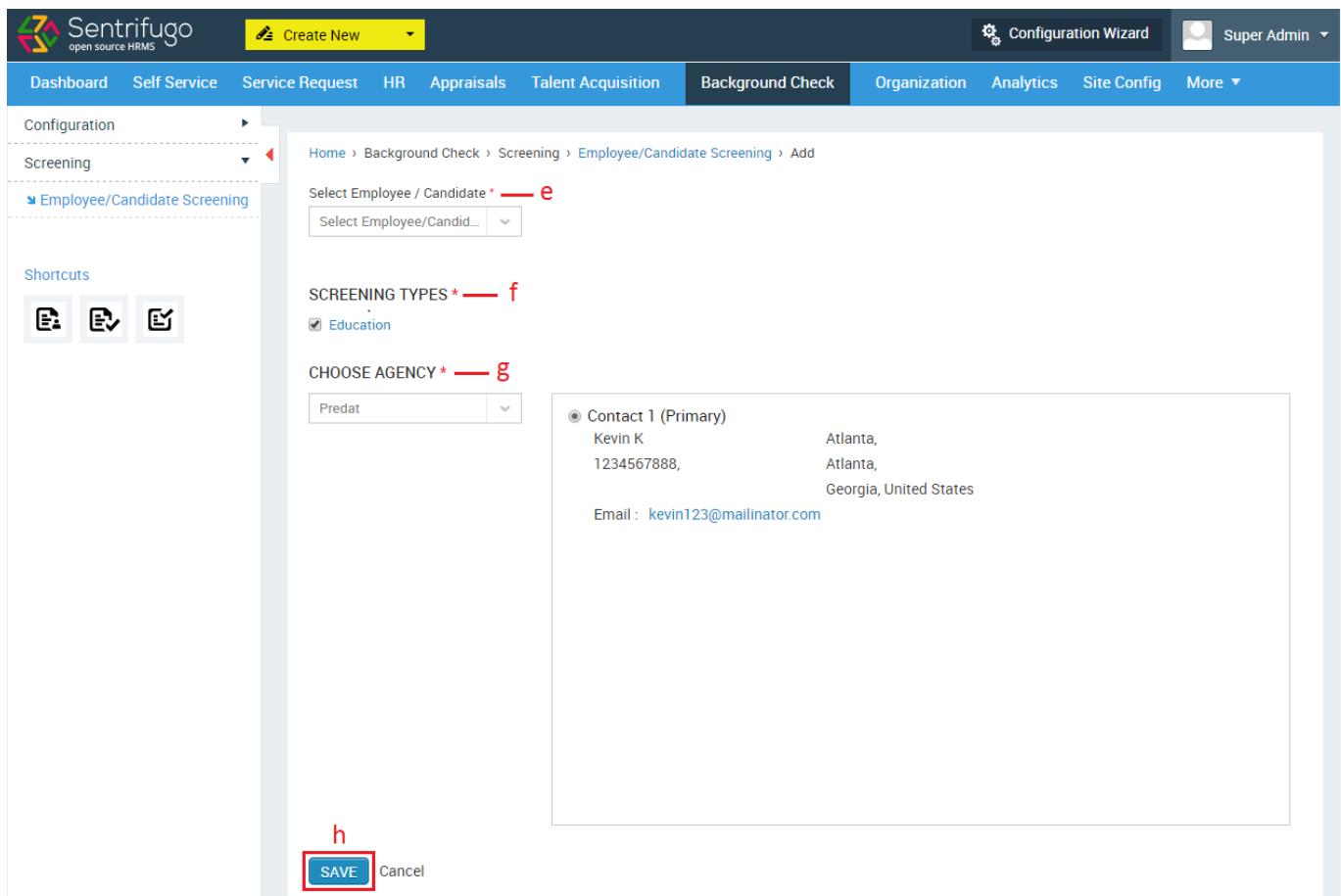
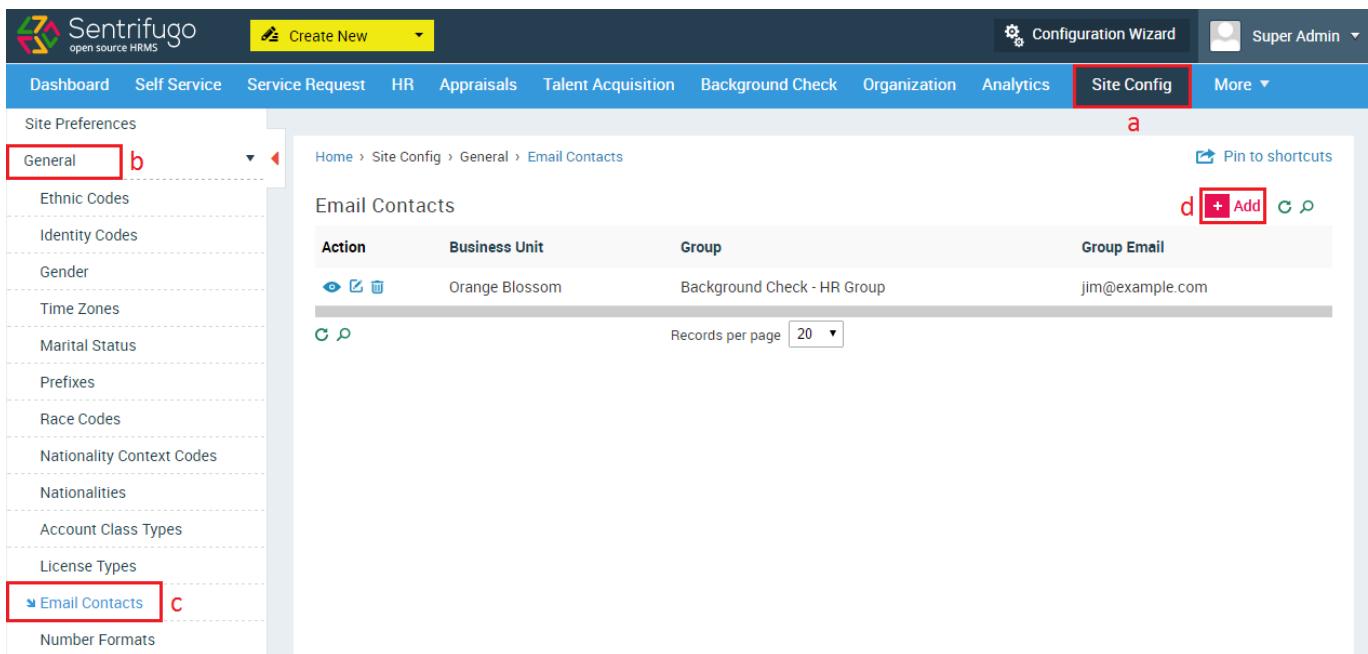


Figure 120

- 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



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

Figure 121

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

Please refer Figure 122

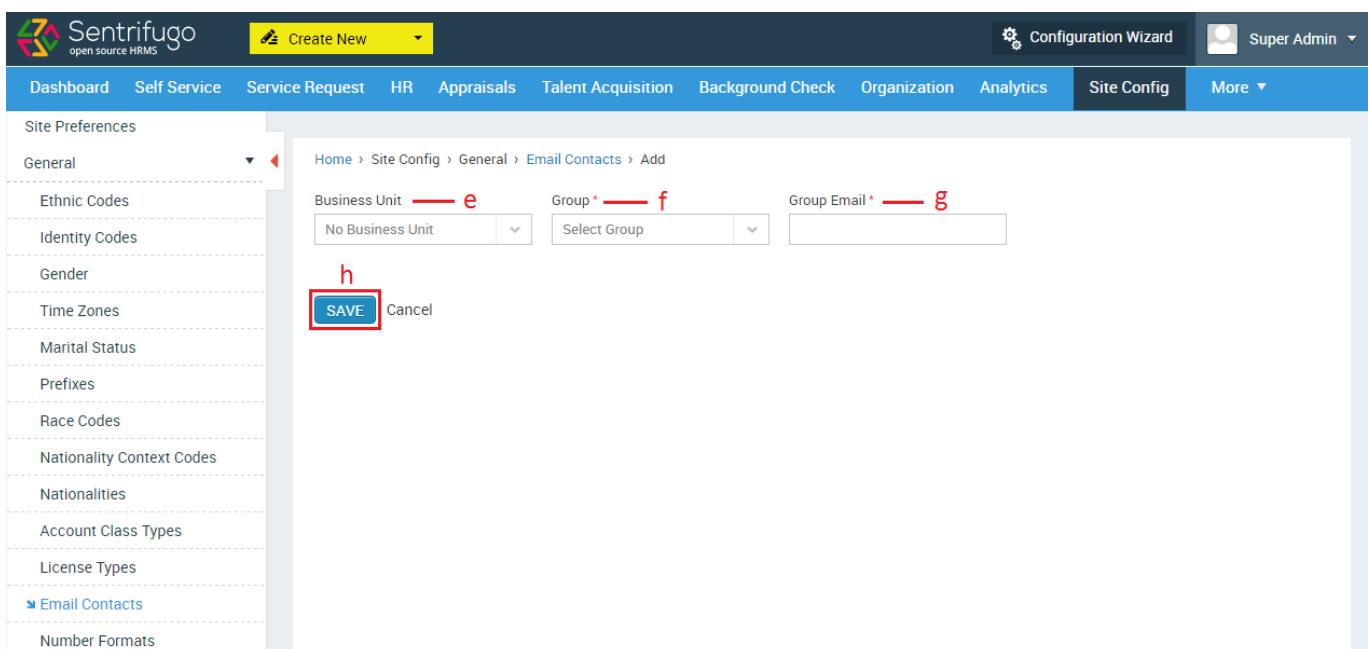


Figure 122

- 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.**

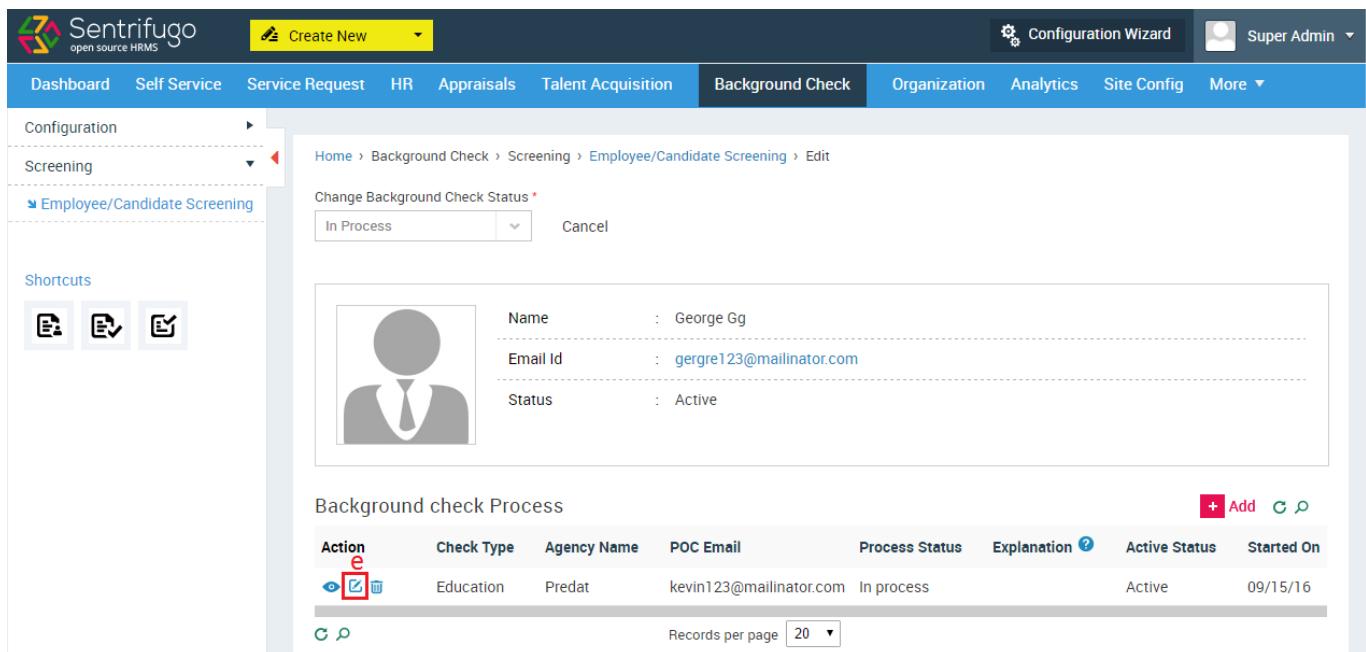
## 8.5 How do I provide Feedback as an External User?

*Please refer Figure 123*

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*



Change Background Check Status \*

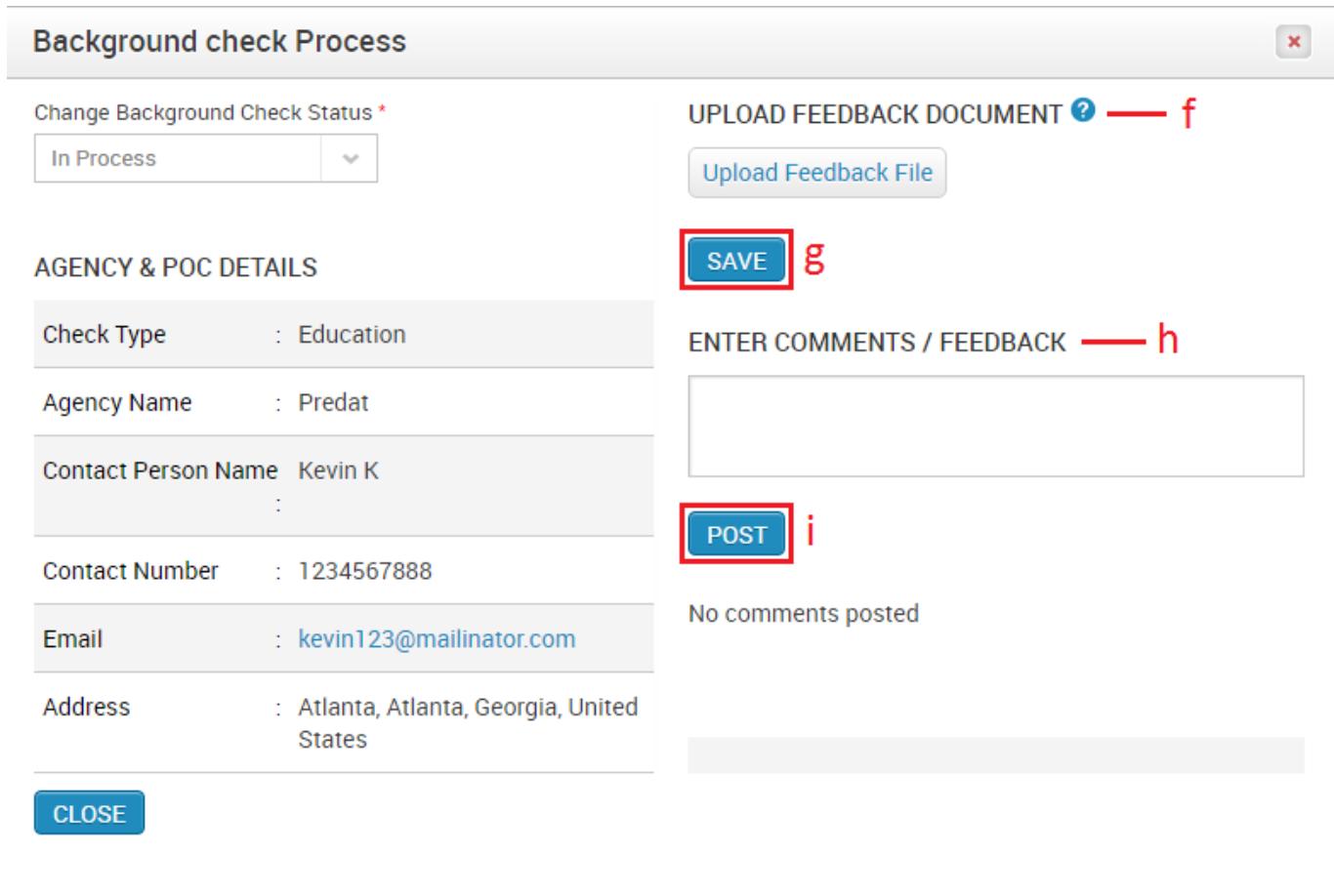
In Process Cancel

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 \*

In Process

UPLOAD FEEDBACK DOCUMENT ? — f

Upload Feedback File

SAVE g

ENTER COMMENTS / FEEDBACK — h

POST i

No comments posted

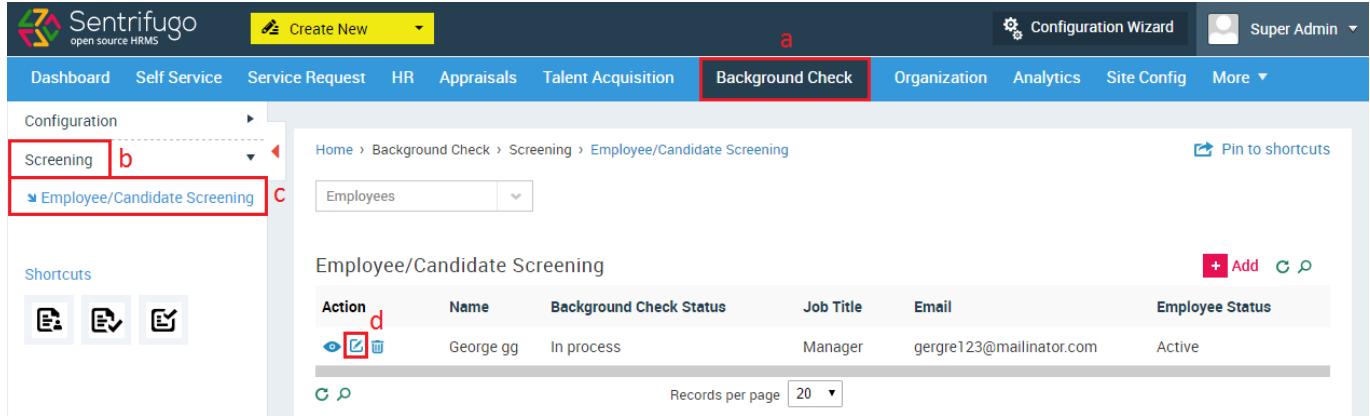
CLOSE

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

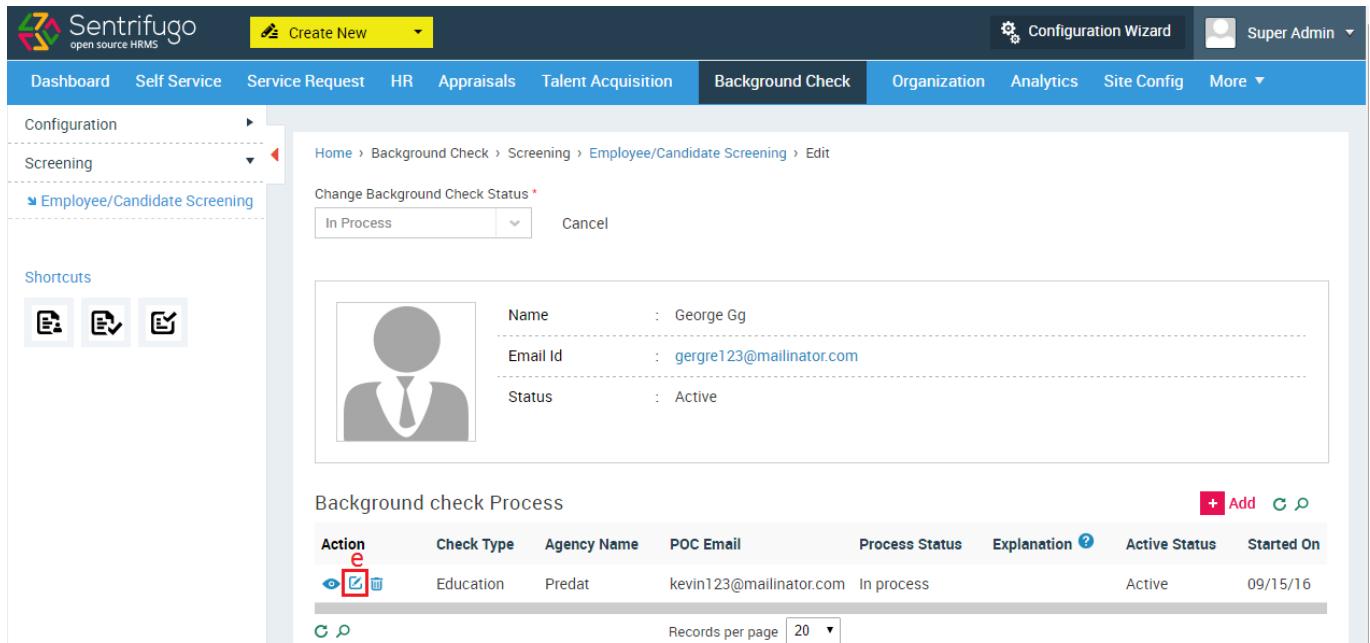


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, **Background Check**, Organization, Analytics, Site Config, and More. A left sidebar for 'Configuration' shows 'Screening' expanded, with 'Employee/Candidate Screening' selected. The main content area displays 'Employee/Candidate Screening' with a table showing one record: George Gg (In process, Manager, gerger123@mailinator.com, Active). Action buttons include '+ Add', 'Edit' (highlighted with a red box), and 'Delete'.

Figure 126

- 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 **Edit** icon against an employee/candidate name

Please refer Figure 127



The screenshot shows the 'Edit' screen for an employee/candidate screening. The top navigation bar and main menu are identical to Figure 126. The left sidebar shows 'Employee/Candidate Screening' expanded. The main content area shows a 'Change Background Check Status' dropdown set to 'In Process' and a 'Cancel' button. Below is a form for George Gg with fields: Name (George Gg), Email Id (gerger123@mailinator.com), and Status (Active). At the bottom is a table titled 'Background check Process' with one row: Action (highlighted with a red box), Check Type (Education), Agency Name (Predat), POC Email (kevin123@mailinator.com), Process Status (In process), Explanation (N/A), Active Status (Active), and Started On (09/15/16).

Figure 127

**To close a specific Background process:**

- e. 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
—f
UPLOAD FEEDBACK DOCUMENT ?

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
 

 SAVE  
  
 ENTER COMMENTS / FEEDBACK  
POST

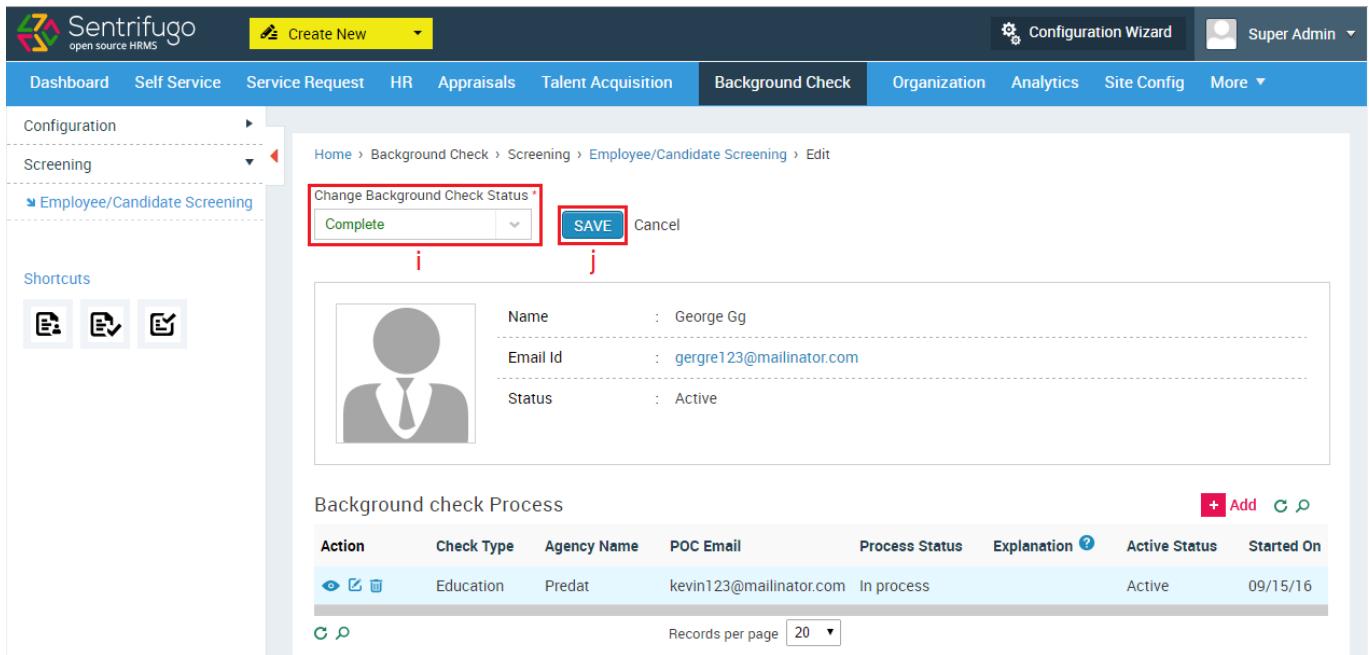
No comments posted

CLOSE

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*



Home > Background Check > Screening > Employee/Candidate Screening > Edit

Change Background Check Status:

- i. Complete
- j. SAVE Cancel

	Name : George Gg
	Email Id : gergre123@mailinator.com
	Status : Active

Background check Process

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

Records per page: 20

Figure 130

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

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

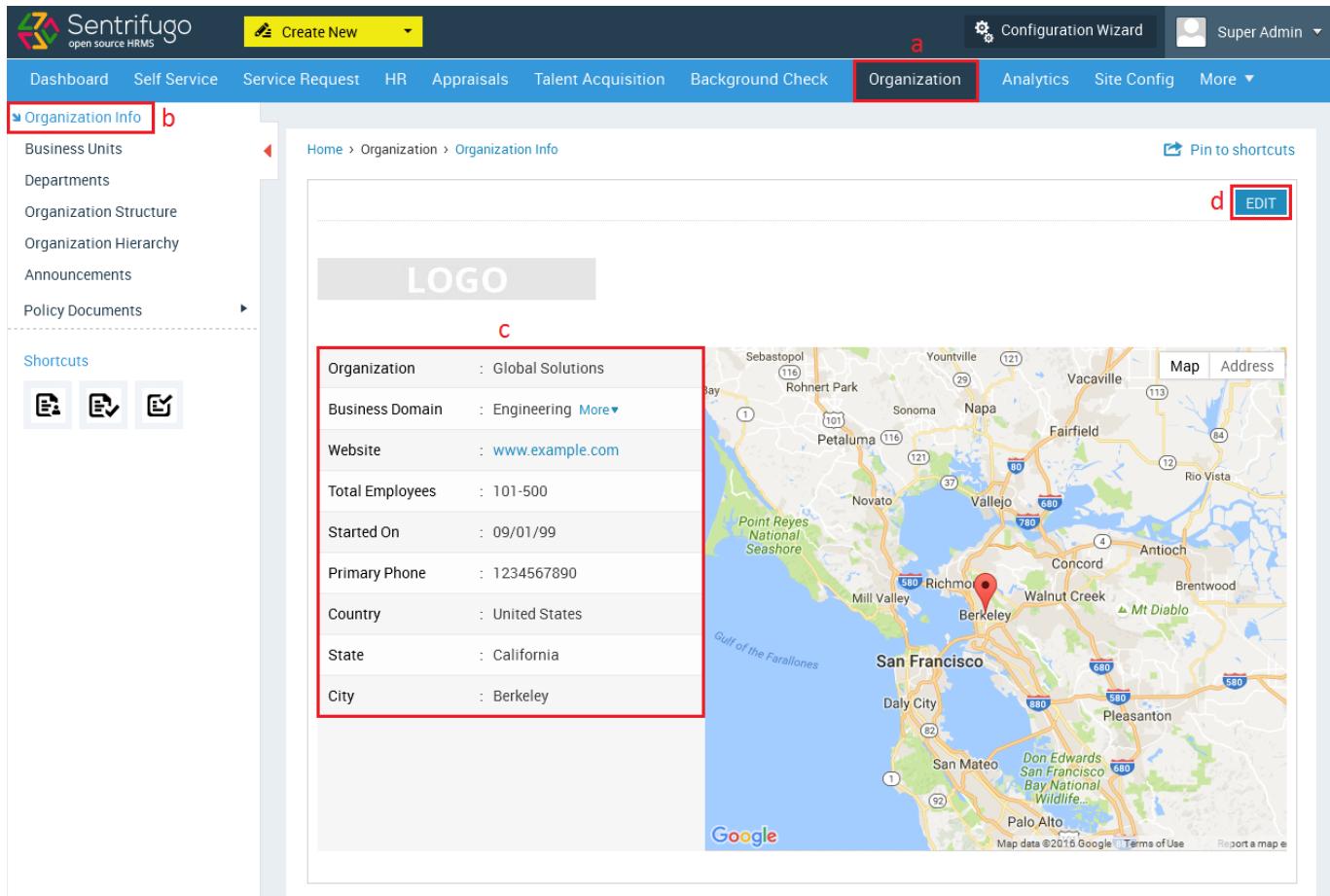
# 9. Organization

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 web interface. At the top, there's a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, **Organization** (which is highlighted with a red box), Analytics, Site Config, and More. On the far left, a sidebar has a 'Organization Info' link (also highlighted with a red box) under 'Shortcuts'. The main content area shows a 'LOGO' placeholder, a table of organization details (highlighted with a red box), and a map of the San Francisco Bay area. The table details are:

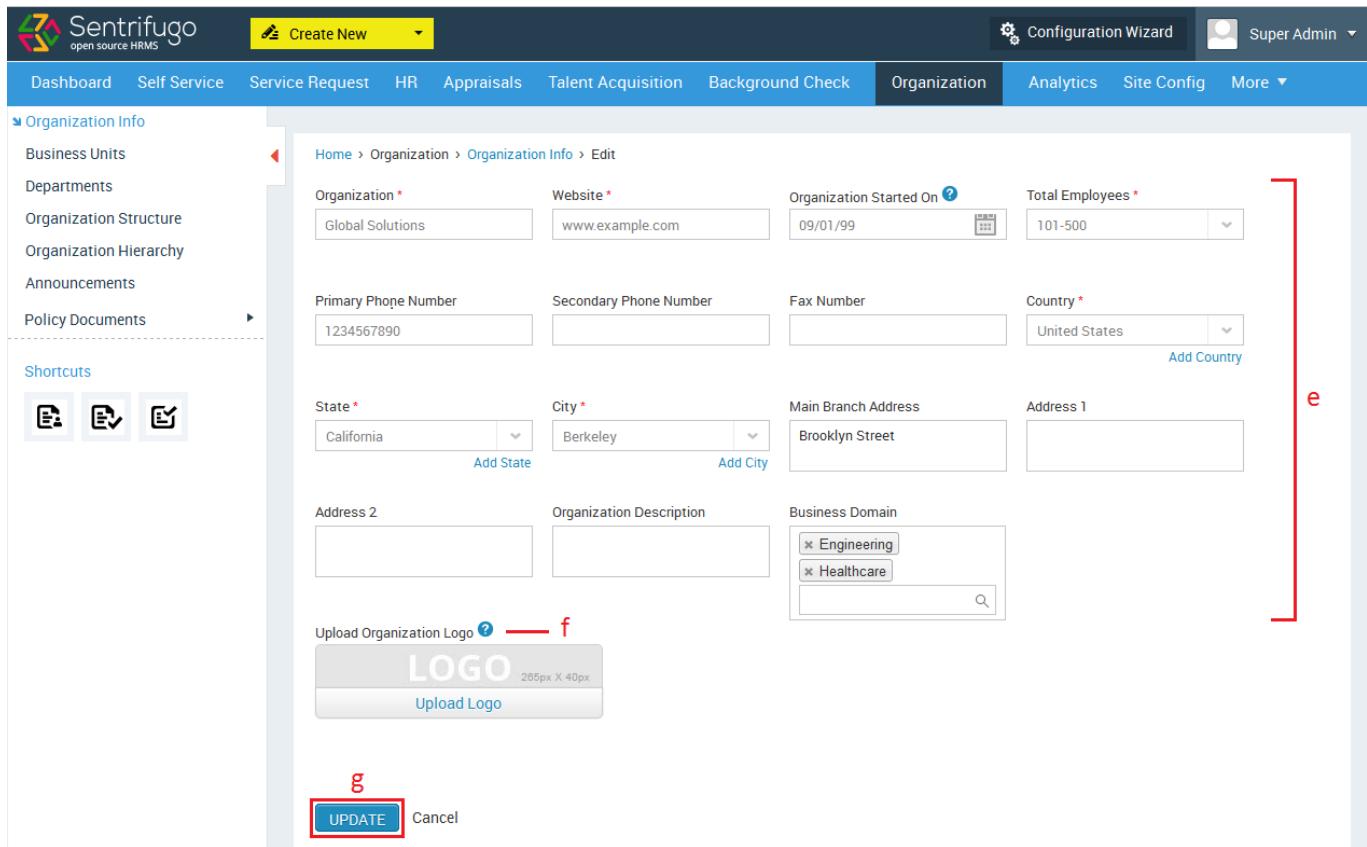
Organization	: Global Solutions
Business Domain	: Engineering <a href="#">More</a>
Website	: <a href="http://www.example.com">www.example.com</a>
Total Employees	: 101-500
Started On	: 09/01/99
Primary Phone	: 1234567890
Country	: United States
State	: California
City	: Berkeley

On the right side of the main content area, there's a 'Map' button, an 'Address' button, and an 'Edit' button (highlighted with a red box). The map shows the San Francisco Bay area with a red marker indicating the location of the organization.

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 web interface for managing organization details. At the top, there's a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization (which is selected), Analytics, Site Config, and More. On the far right, there are links for Configuration Wizard, Super Admin, and a user profile icon. Below the navigation is a sidebar titled 'Organization Info' containing links for Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, and Policy Documents. Under 'Shortcuts', there are three icons: a document, a person, and a gear. The main content area is titled 'Edit' and shows fields for Organization (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 with a placeholder 'LOGO 285px X 40px'. At the bottom, there are 'UPDATE' and 'Cancel' buttons, with the 'UPDATE' button highlighted by a red box.

Figure 132

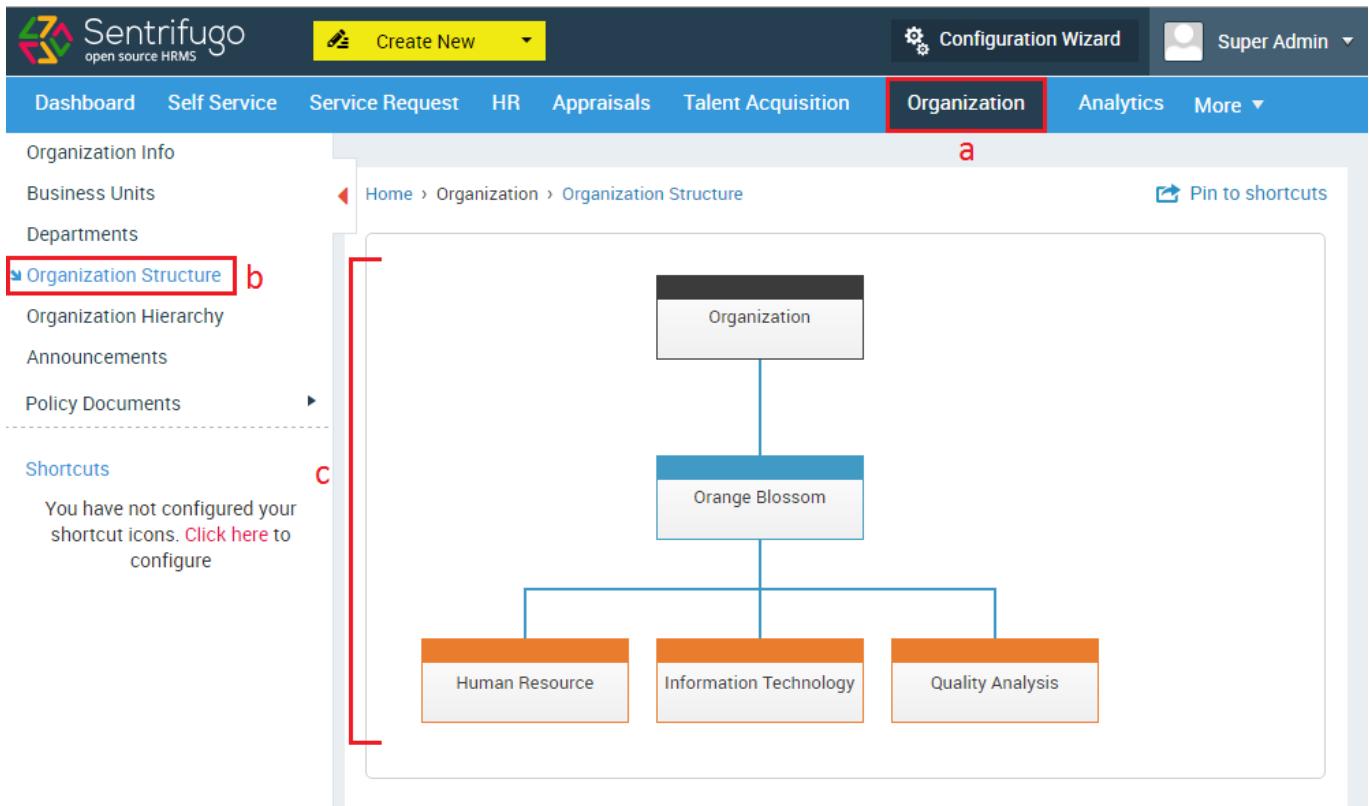
- e. Enter or modify details
- f. You can change your company logo
- g. Click **UPDATE** button

## 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 links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, **Organization**, Analytics, and More. The 'Organization' link is highlighted with a red box and labeled 'a'. Below the navigation bar is a left sidebar with links for Organization Info, Business Units, Departments, and **Organization Structure**, which is also highlighted with a red box and labeled 'b'. The main content area displays the organization structure as a hierarchical tree. The root node is 'Organization', which branches down to 'Orange Blossom', which further branches down to 'Human Resource', 'Information Technology', and 'Quality Analysis'. A red line labeled 'c' points from the sidebar to the tree structure. At the bottom of the sidebar, there is a message: 'You have not configured your shortcut icons. Click here to configure'.

Figure 133

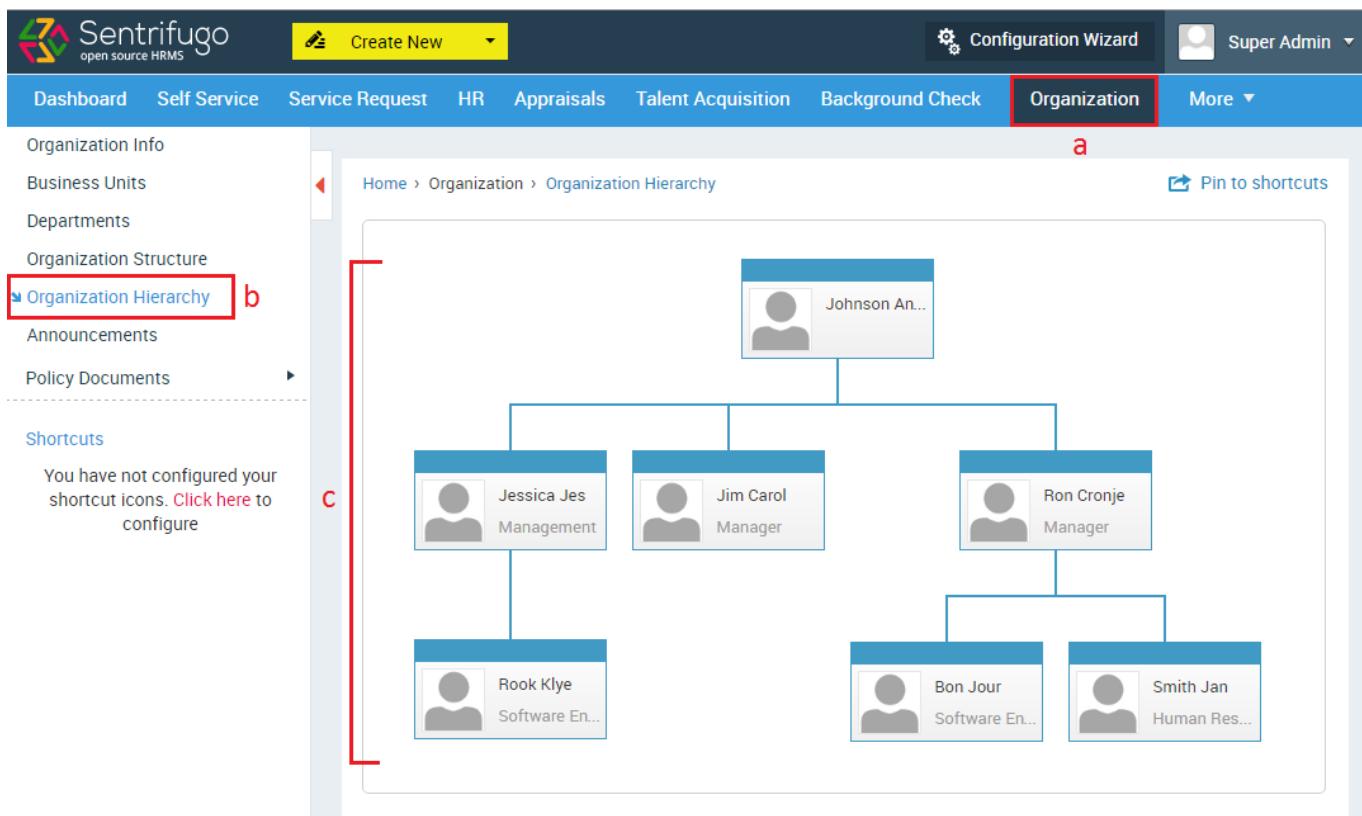
- Click **Organization** in the top menu
- Click **Organization Structure** on the left side panel
- Your Organization Structure will be displayed here



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*



Dashboard   Self Service   Service Request   HR   Appraisals   Talent Acquisition   Background Check   **Organization**   More ▾

Organization Info  
Business Units  
Departments  
Organization Structure  
**Organization Hierarchy** b  
Announcements  
Policy Documents

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

Home > Organization > Organization Hierarchy   [Pin to shortcuts](#)

```

graph TD
    A[Johnson An...] --- B1[Jessica Jes Management]
    A --- B2[Jim Carol Manager]
    A --- B3[Ron Cronje Manager]
    B1 --- C[Rook Klye Software En...]
    B3 --- D[Bon Jour Software En...]
    B3 --- E[Smith Jan Human Res...]
  
```

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.

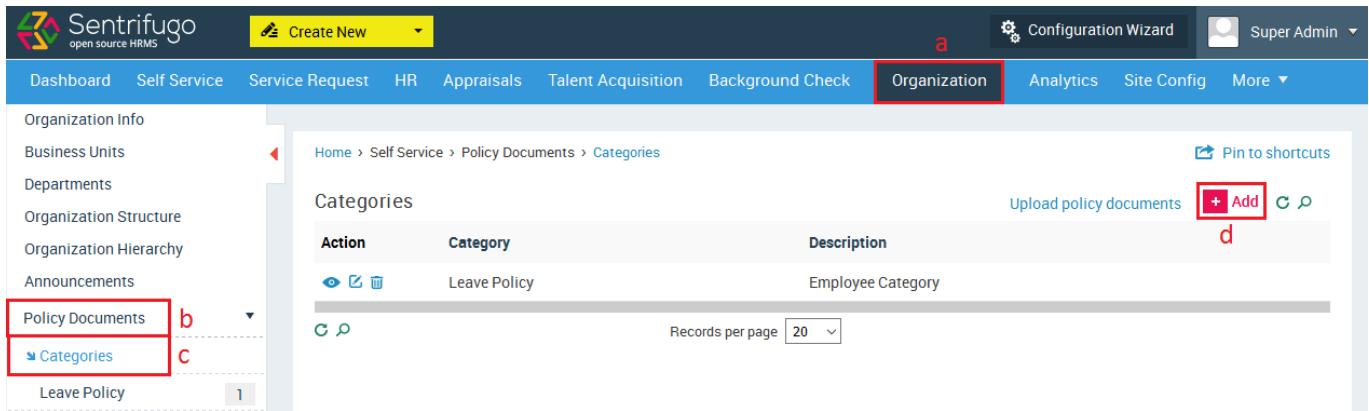
## 9.4 How do I add Announcements?

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*

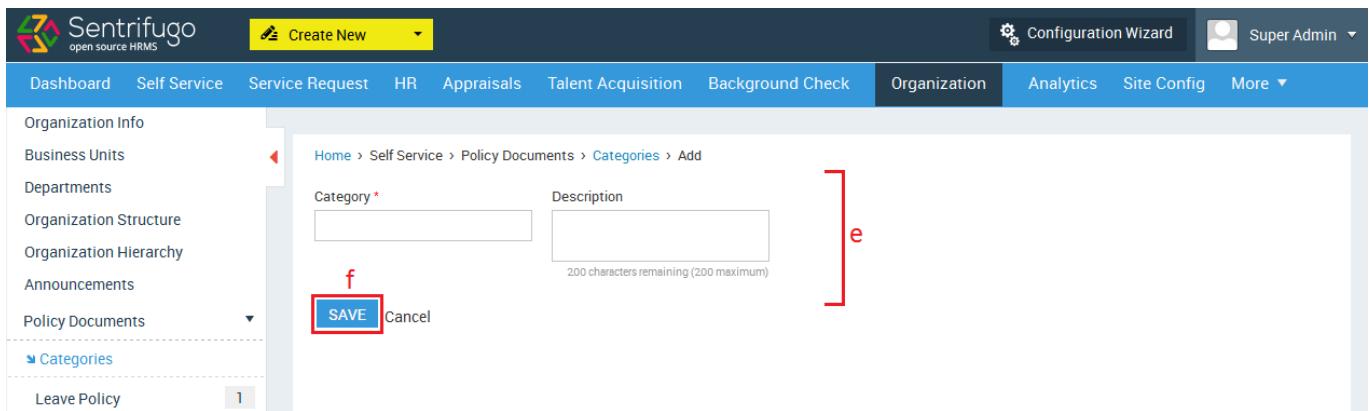


The screenshot shows the Sentrifugo web application interface. The top navigation bar includes a logo, a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. The main menu has several items: Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization (which is highlighted with a red box), Analytics, Site Config, and More. On the left, there's a sidebar with links for Organization Info, Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, Policy Documents (highlighted with a red box), Categories (highlighted with a red box), and Leave Policy. The main content area shows a breadcrumb path: Home > Self Service > Policy Documents > Categories. It displays a table with columns for Action, Category, and Description. One row is shown: Action (eye, edit, delete), Category (Leave Policy), and Description (Employee Category). There are also 'Upload policy documents' and '+Add' buttons. The bottom right of the content area has a 'Records per page' dropdown set to 20.

Figure 135

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

Please refer Figure 136

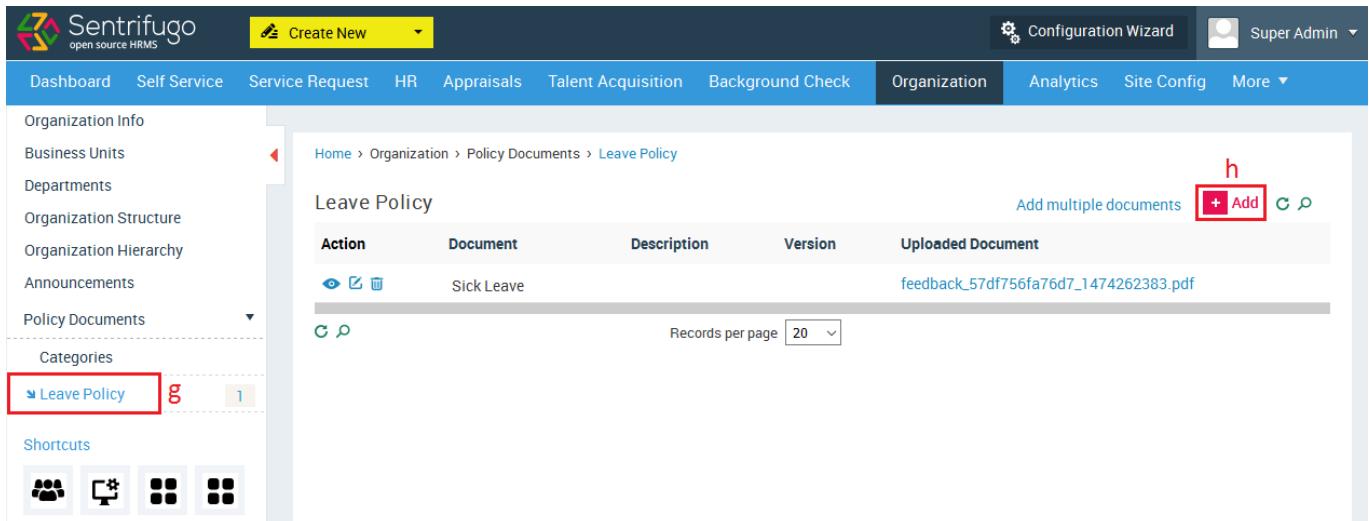


The screenshot shows the 'Add' form for a new category. The top navigation bar and menu are identical to Figure 135. The main content area shows a 'Category' input field (highlighted with a red box) and a 'Description' input field (with a red bracket 'e' pointing to it). Below these are '200 characters remaining (200 maximum)' and 'Cancel' and 'SAVE' buttons (the 'SAVE' button is highlighted with a red box).

Figure 136

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

Please refer Figure 137

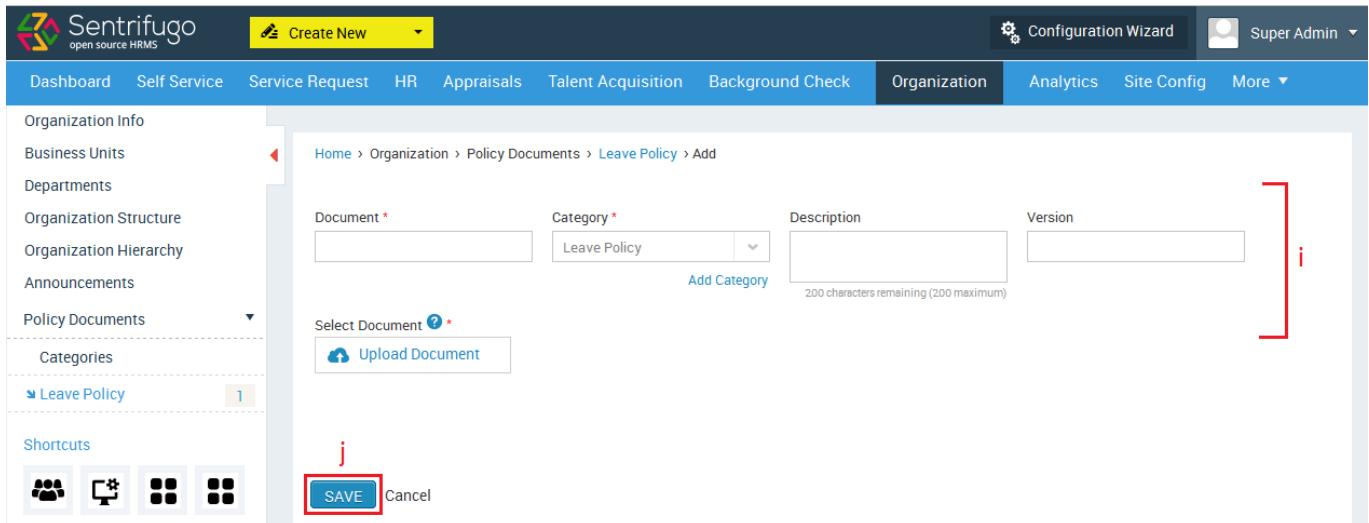


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Create New, Configuration Wizard, Super Admin, Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists Organization Info, Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, Policy Documents (with a red box 'g' around 'Leave Policy'), Categories, and Shortcuts. The main content area displays a table for 'Leave Policy' documents, showing one entry for 'Sick Leave' with a PDF file attached. A red box 'h' highlights the '+Add' button in the top right of the table header.

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



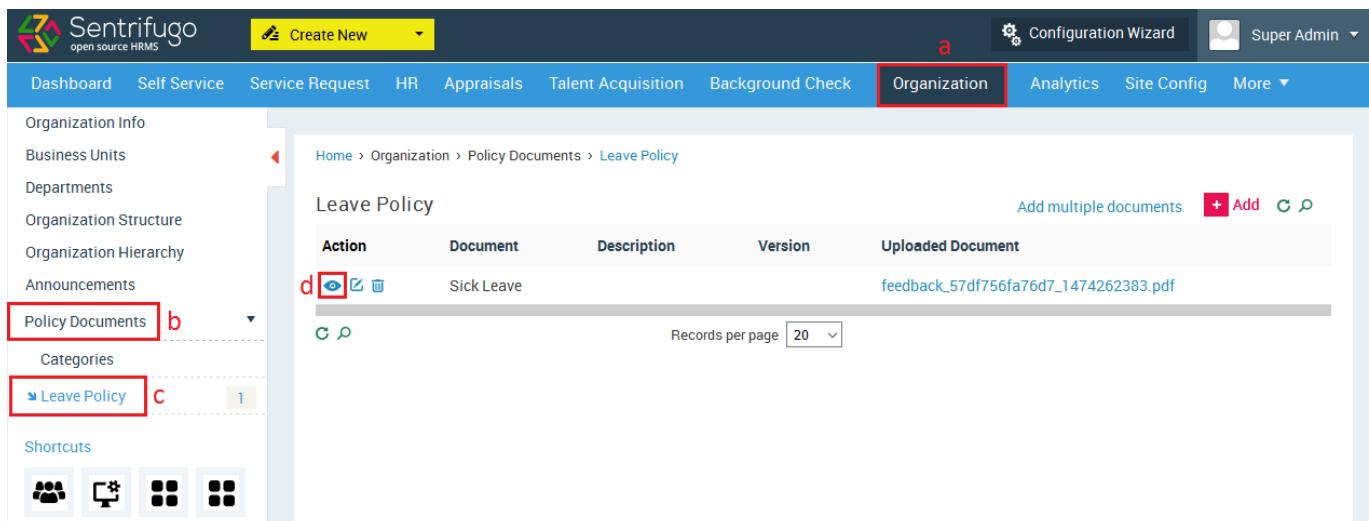
The screenshot shows the 'Leave Policy' add form. It has fields for Document (with a red box 'j' around the 'SAVE' button), Category (set to 'Leave Policy'), Description (with a note about 200 characters remaining), Version, and a 'Select Document' section with an 'Upload Document' button. A red bracket 'i' groups the 'Document', 'Category', 'Description', and 'Version' fields.

Figure 138

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

## 9.6 How do I view Policy Documents?

Please refer Figure 139



The screenshot shows the Sentrifugo HRMS application interface. The top navigation bar has a 'Create New' dropdown, 'Configuration Wizard', 'Super Admin', and 'Organization' (which is highlighted with a red box). Below the navigation is a blue header bar with links: Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization (highlighted with a red box), Analytics, Site Config, and More. On the left, there's a sidebar with links: Organization Info, Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, Policy Documents (highlighted with a red box), Categories, Leave Policy (highlighted with a red box), and Shortcuts. The main content area shows a table titled 'Leave Policy' with one row: Action (eye icon), Document (Sick Leave), Description (Sick Leave), Version (1), and Uploaded Document (feedback\_57df756fa76d7\_1474262383.pdf). There are also 'Add multiple documents' and 'Add' buttons. At the bottom of the table are search and records per page controls. A lightbulb icon with a tip is overlaid on the screenshot.

Figure 139

- Click **Organization** in the top menu
- Click **Policy Documents** on the left menu panel
- Click on the category name you want to view (We have used 'Leave Policy' here as an example)
- 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.

You 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*

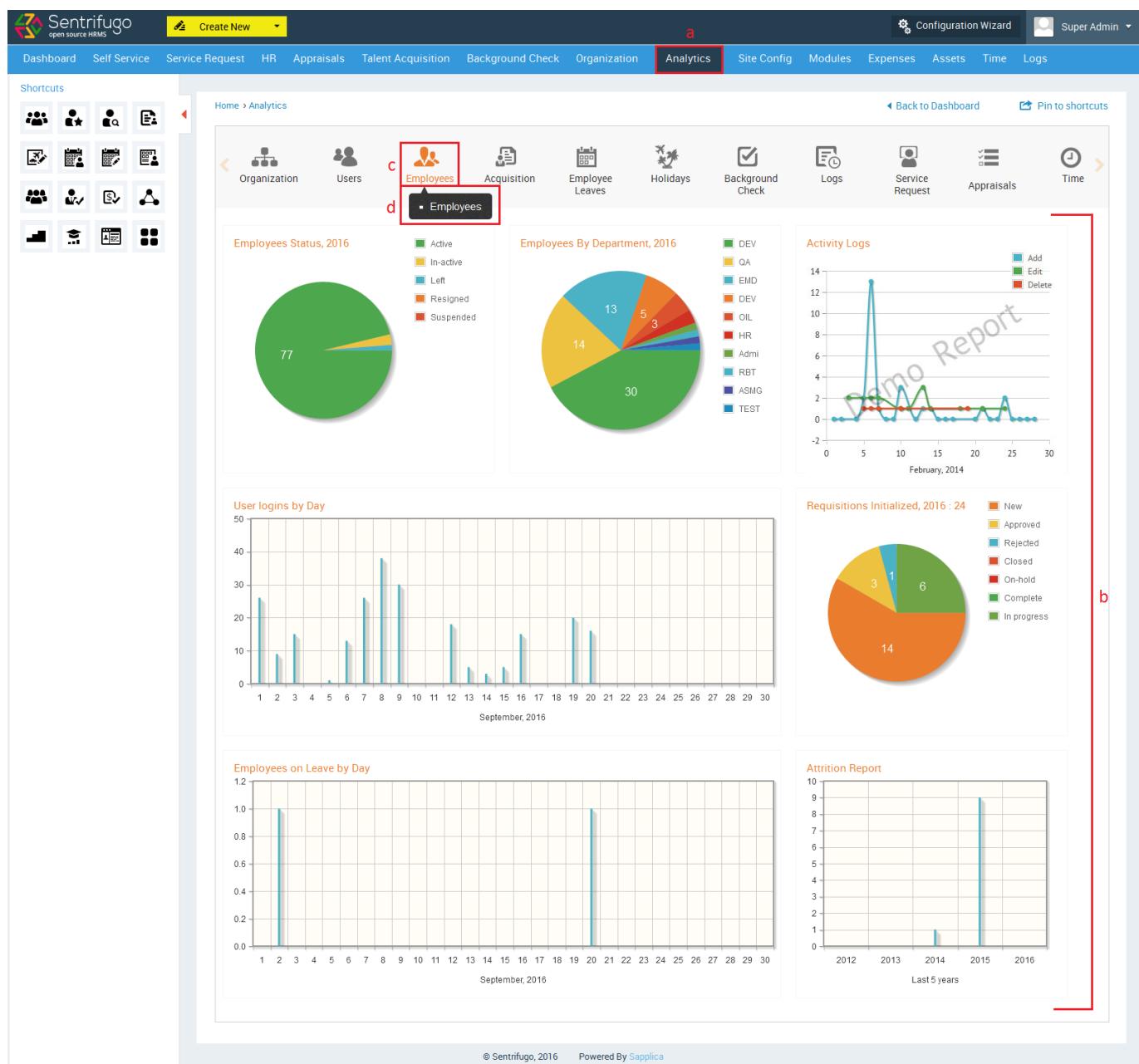
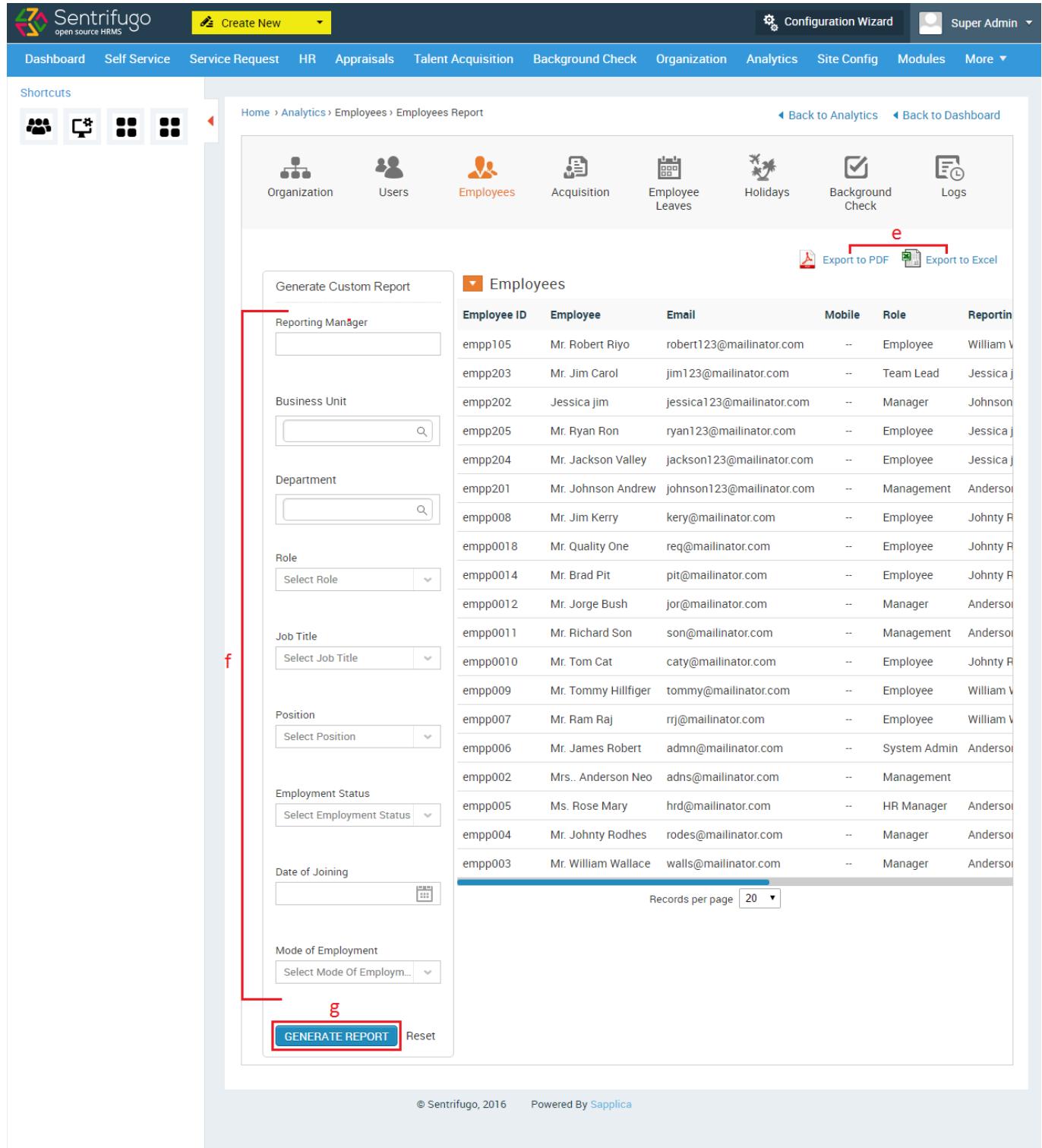


Figure 140

- a. Click **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

Please refer Figure 141



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, Talent Acquisition, Background Check, Organization, Analytics, Site Config, Modules, and More. On the far right, there are Configuration Wizard and Super Admin buttons.

The main content area is titled "Employees Report". It features a grid of icons for Organization, Users, Employees (highlighted in orange), Acquisition, Employee Leaves, Holidays, Background Check, and Logs. Below these icons are two export buttons: "Export to PDF" and "Export to Excel".

To the left of the main grid, there is a sidebar with a "Generate Custom Report" section containing several dropdown and input fields:

- Reporting Manager: A dropdown menu.
- Business Unit: An input field with a search icon.
- Department: An input field with a search icon.
- Role: A dropdown menu.
- Job Title: A dropdown menu.
- Position: A dropdown menu.
- Employment Status: A dropdown menu.
- Date of Joining: An input field with a calendar icon.
- Mode of Employment: A dropdown menu.

At the bottom of this sidebar is a large blue "GENERATE REPORT" button, which is highlighted with a red box labeled "g".

The main grid displays a table of employee data with the following columns: Employee ID, Employee, Email, Mobile, Role, and Reporting Manager. The table contains 20 rows of sample data. At the bottom of the grid, there is a "Records per page" dropdown set to 20.

At the very bottom of the page, there is a footer with the text "© Sentrifugo, 2016" and "Powered By Sapplica".

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

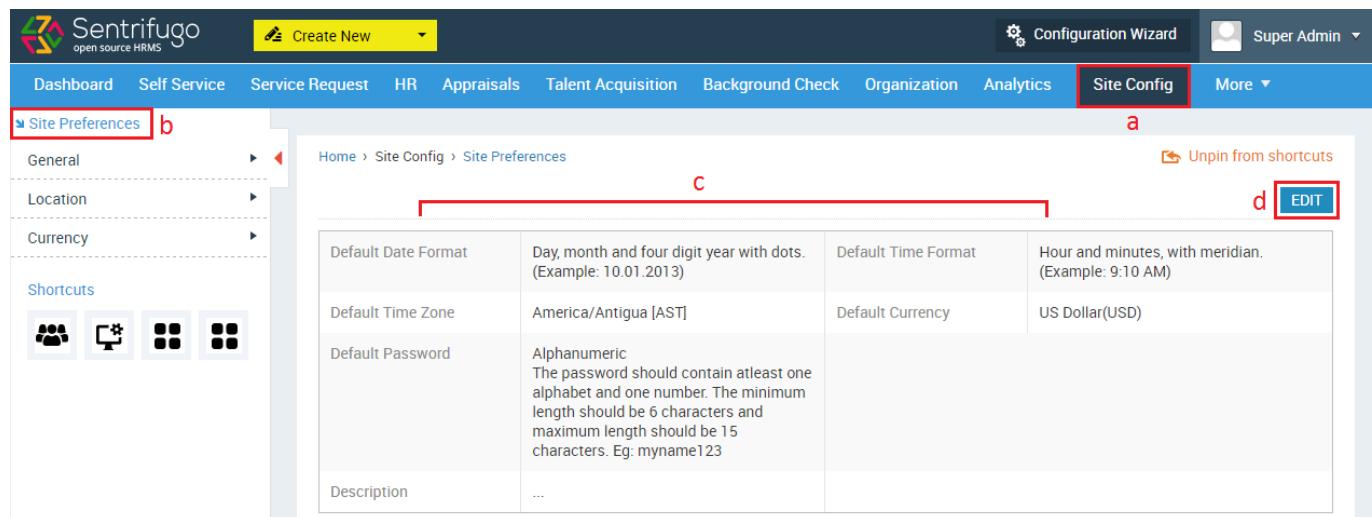
# 11. Site Config

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*

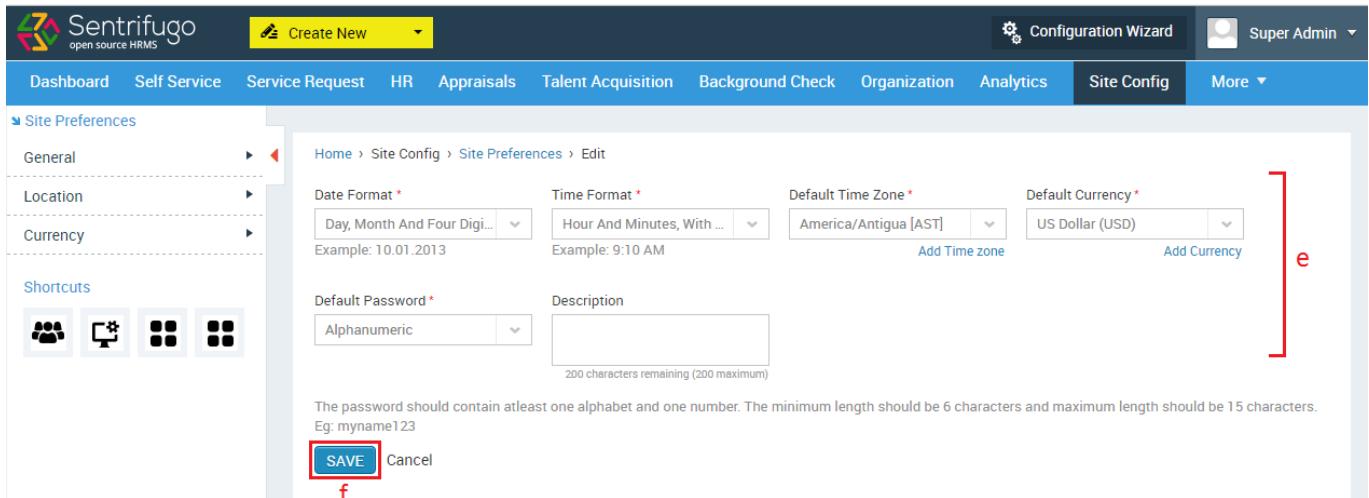


Default Date Format	Day, month and four digit year with dots. (Example: 10.01.2013)	Default Time Format	Hour and minutes, with meridian. (Example: 9:10 AM)
Default Time Zone	America/Antigua [AST]	Default Currency	US Dollar(USD)
Default Password	Alphanumeric The password should contain atleast one alphabet 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' options under 'Site Preferences'. Below that is a 'Shortcuts' section with four icons. The main content area shows the following fields:

- Date Format \*: Day, Month And Four Digi... (dropdown)
- Time Format \*: Hour And Minutes, With ... (dropdown)
- Default Time Zone \*: America/Antigua [AST] (dropdown)
- Default Currency \*: US Dollar (USD) (dropdown)
- Default Password \*: Alphanumeric (dropdown)
- Description: A text input field with placeholder '200 characters remaining (200 maximum)'.

Below these fields is a note: "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". At the bottom are 'SAVE' and 'Cancel' buttons, with 'SAVE' being highlighted by a red box and bracket 'f'.

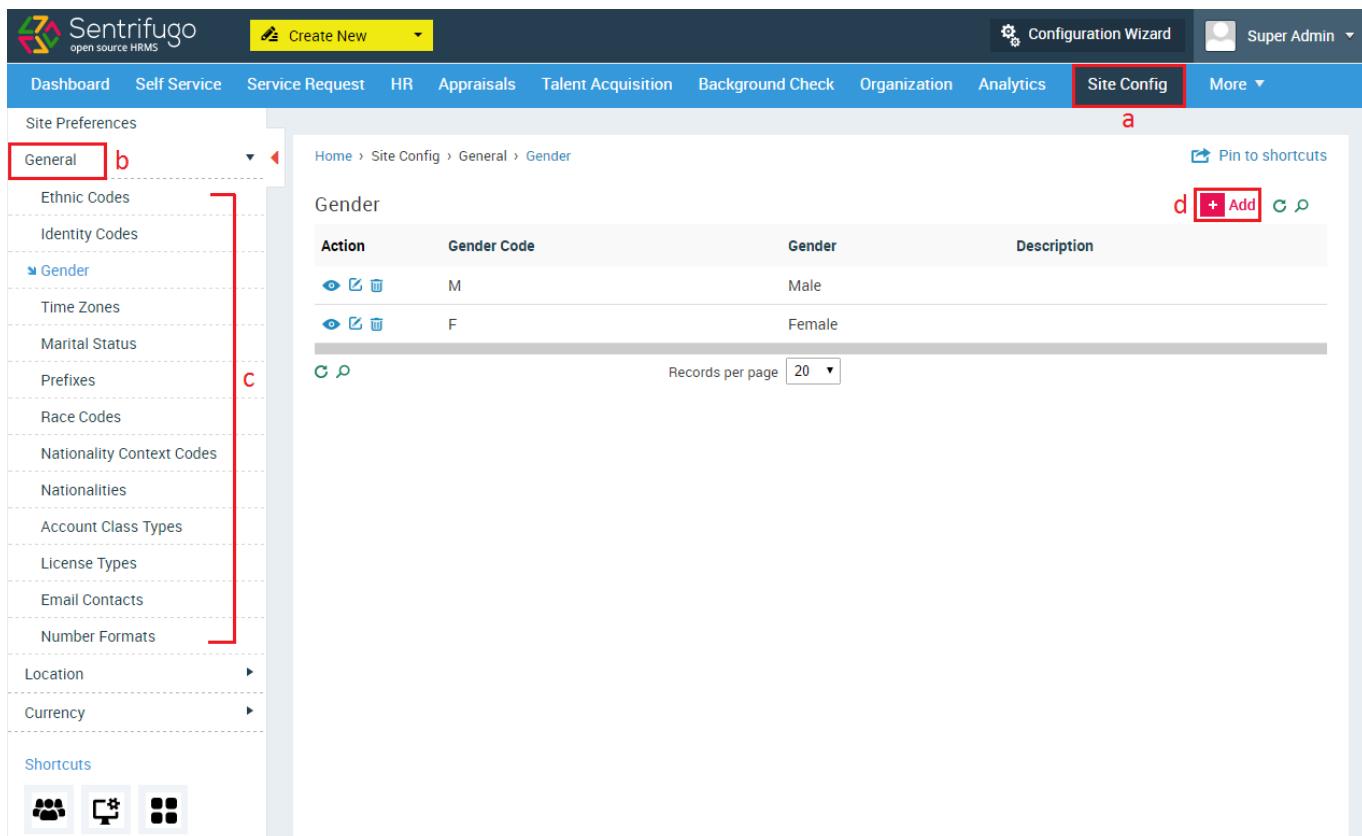
Figure 143

- 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*



Home > Site Config > General > Gender

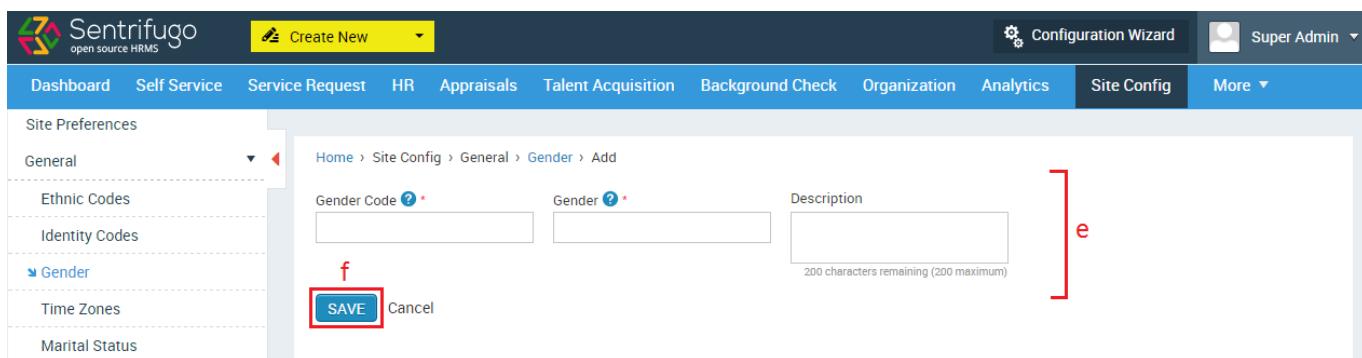
Action	Gender Code	Gender	Description
	M	Male	
	F	Female	

Records per page: 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



Home > Site Config > General > Gender > Add

Gender Code <small>?</small> *	Gender <small>?</small> *	Description
<input type="text"/>	<input type="text"/>	<input type="text"/> <small>200 characters remaining (200 maximum)</small>

**SAVE** Cancel

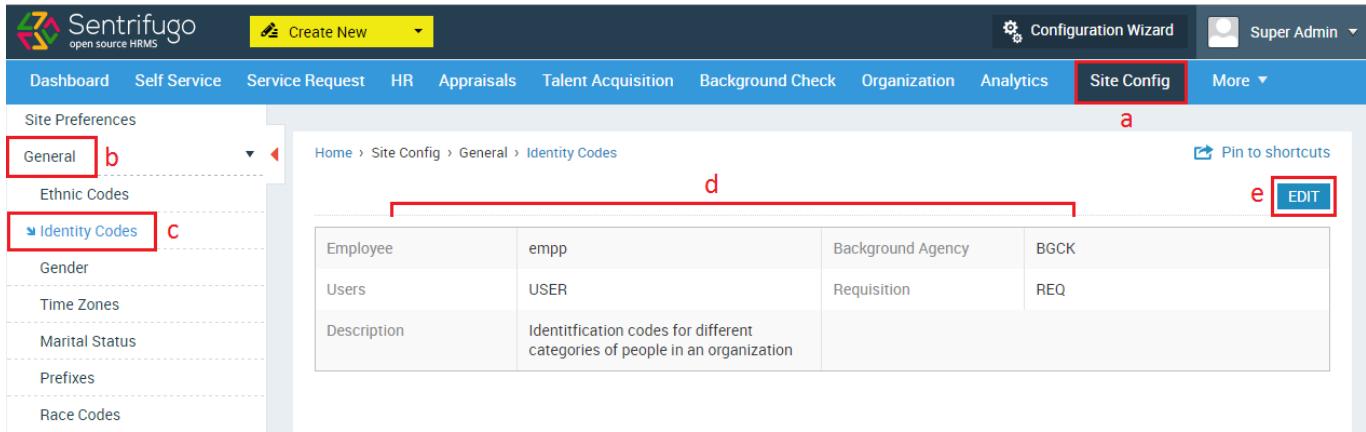
Figure 145

- 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*

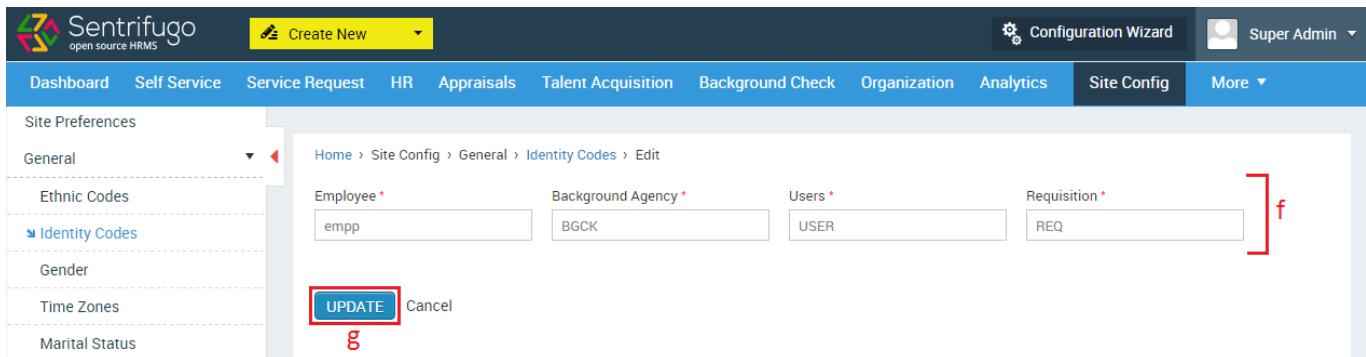


Employee	empp	Background Agency	BGCK
Users	USER	Requisition	REQ
Description	Identification codes for different categories of people in an organization		

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*



Employee *	Background Agency *	Users *	Requisition *
empp	BGCK	USER	REQ

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

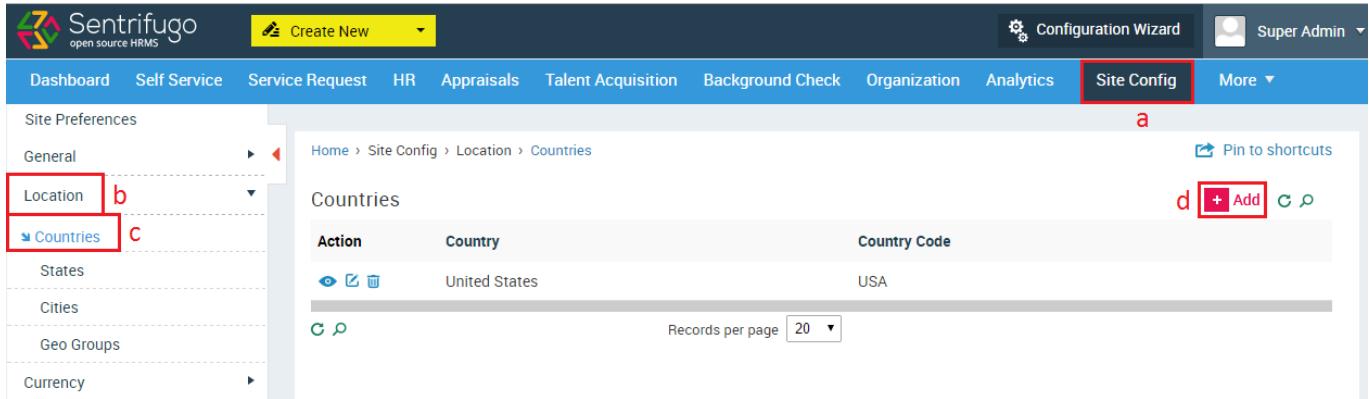


Figure 148

- 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

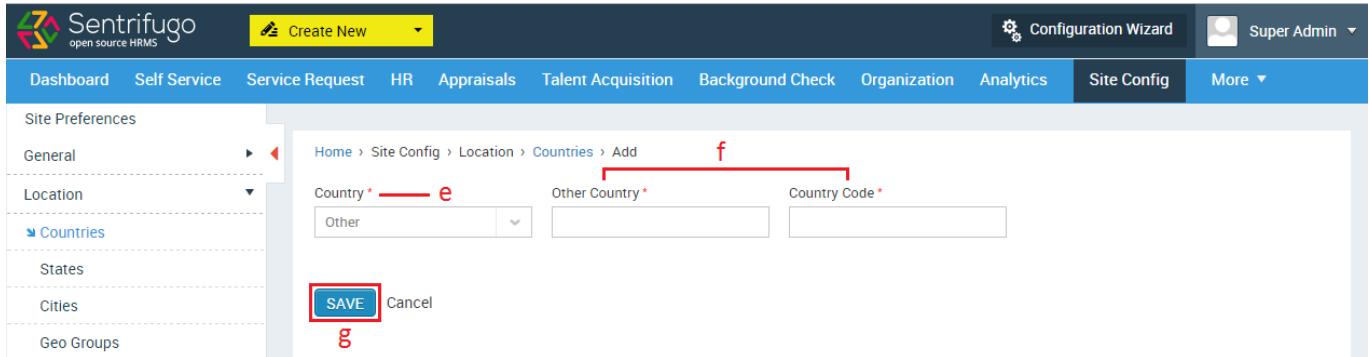


Figure 149

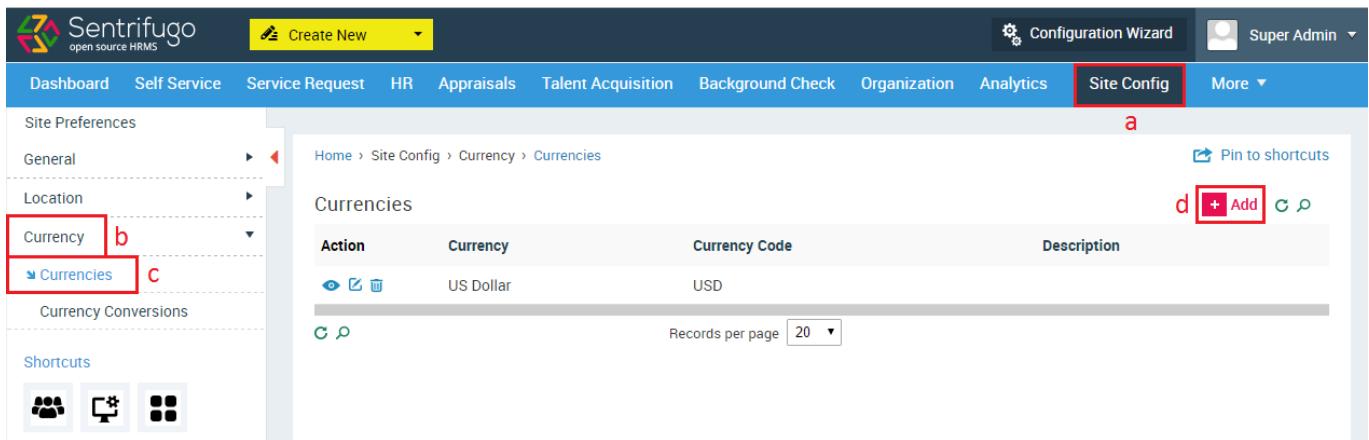
- Select 'Other' in the Country field
- Provide Other Country name and code
- Click **SAVE** button

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



Action	Currency	Currency Code	Description
	US Dollar	USD	

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

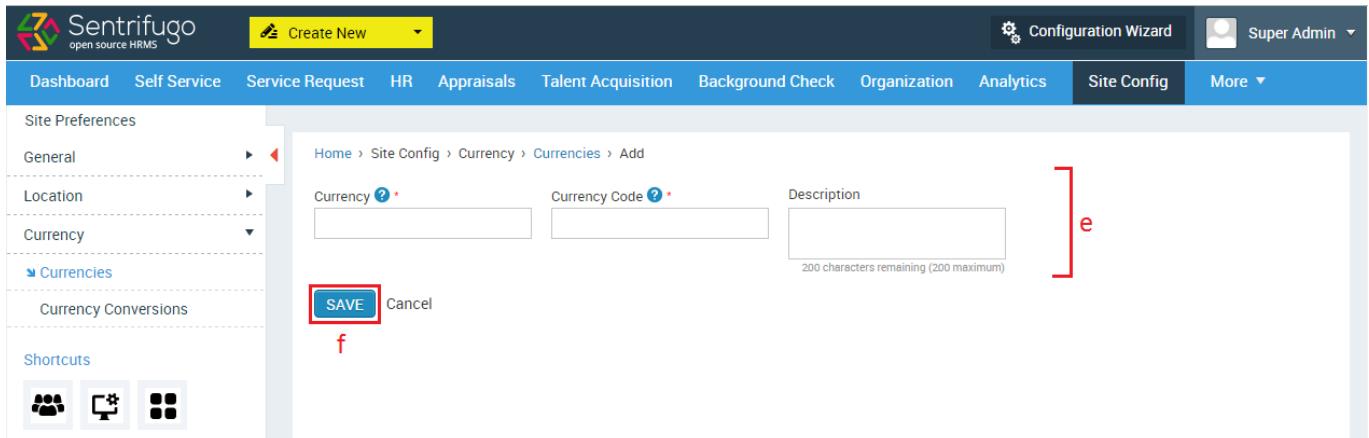
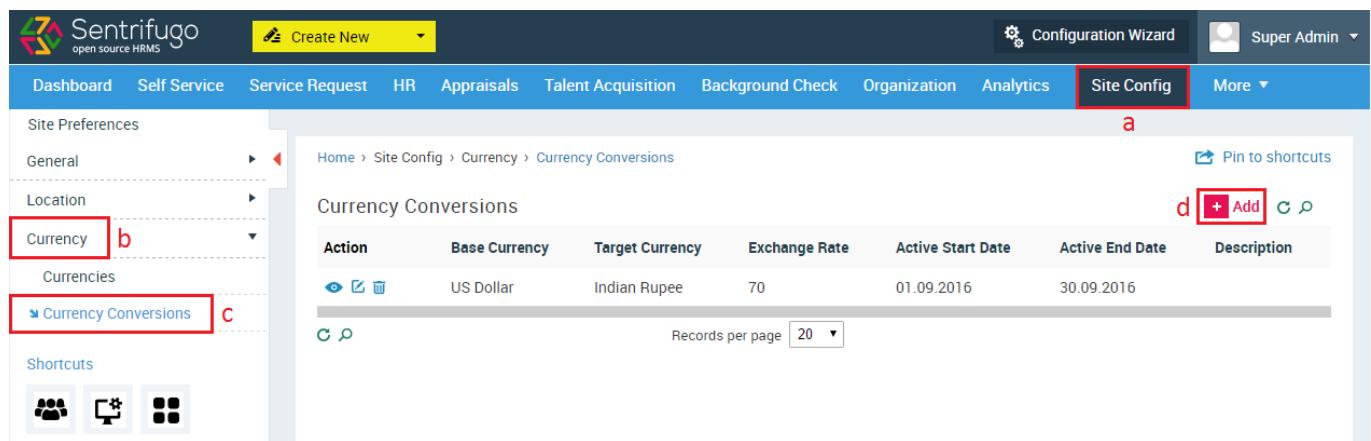


Figure 151

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

## Currency Conversions

Please refer Figure 152

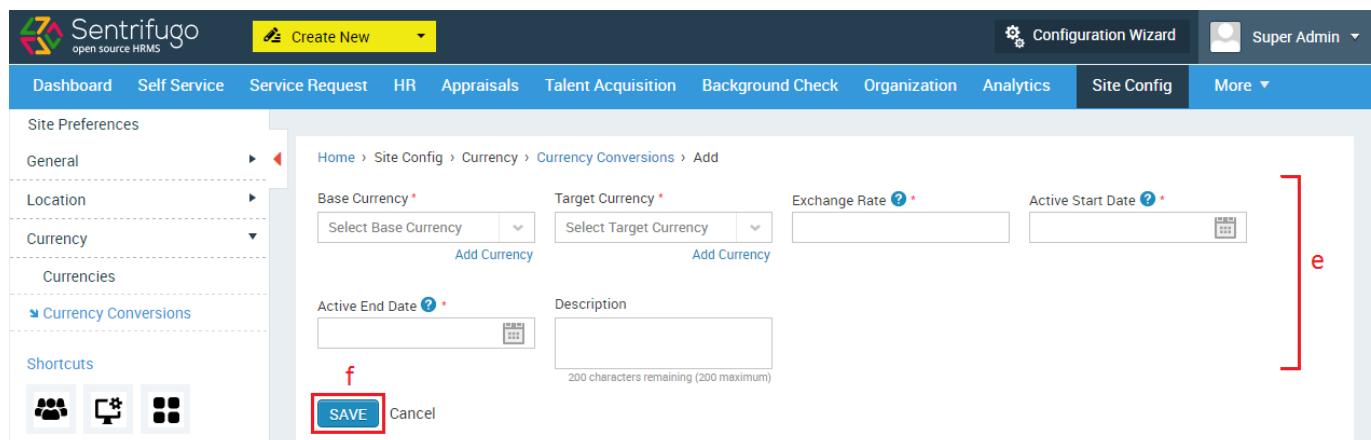


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Configuration Wizard', 'Super Admin', and 'Site Config' (which is highlighted with a red box 'a'). The left sidebar has sections for 'Site Preferences' (General, Location, Currency), 'Currencies', and 'Shortcuts'. Under 'Currency', 'Currency Conversions' is selected and highlighted with a red box 'c'. The main content area shows a table titled 'Currency Conversions' with columns: Action, Base Currency, Target Currency, Exchange Rate, Active Start Date, Active End Date, and Description. A single row is displayed: US Dollar to Indian Rupee at an exchange rate of 70, active from 01.09.2016 to 30.09.2016. There are buttons for 'Pin to shortcuts' and '+Add' (highlighted with a red box 'd')). The bottom of the table shows 'Records per page' set to 20.

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



The screenshot shows the 'Add' form for 'Currency Conversions'. The top navigation bar and left sidebar are identical to Figure 152. The main content area has a form with fields: 'Base Currency \*' (dropdown with 'Select Base Currency' and 'Add Currency' button), 'Target Currency \*' (dropdown with 'Select Target Currency' and 'Add Currency' button), 'Exchange Rate \*' (text input field), 'Active Start Date \*' (date picker), 'Active End Date \*' (date picker), 'Description' (text area with placeholder '200 characters remaining (200 maximum)'), and a 'Cancel' button. The 'SAVE' button at the bottom left is highlighted with a red box 'f'.

Figure 153

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

## 12. Modules

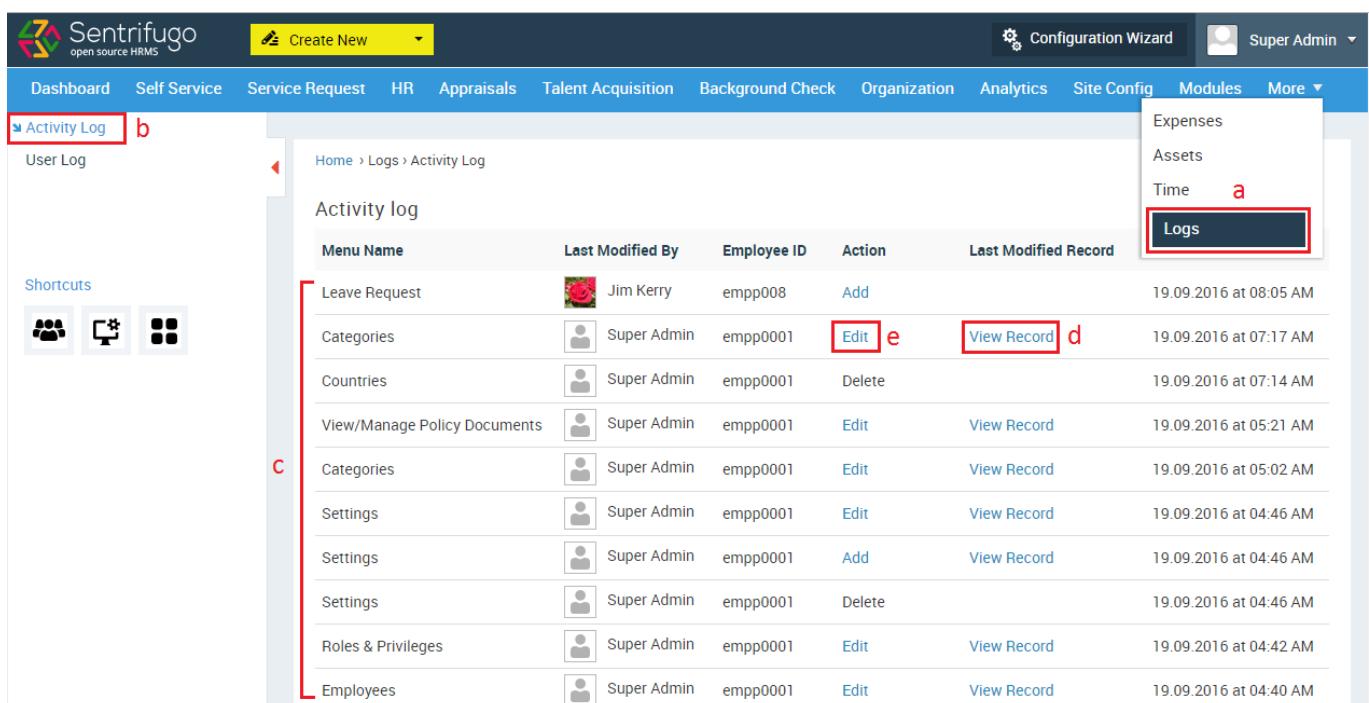
Please refer section [1.3.1 Configuration Wizard: Step 1](#)

## 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*



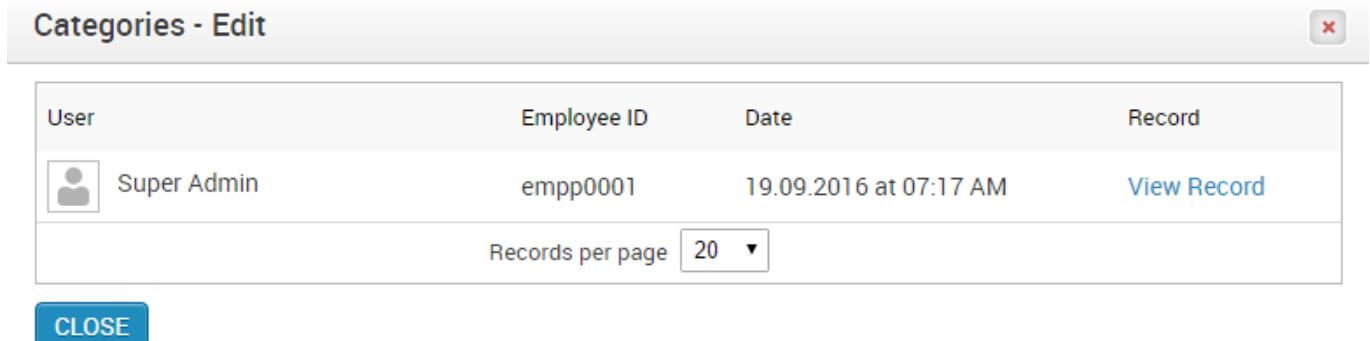
Menu Name	Last Modified By	Employee ID	Action	Last Modified Record
Leave Request	Jim Kerry	empp008	Add	19.09.2016 at 08:05 AM
Categories	Super Admin	empp0001	Edit e	19.09.2016 at 07:17 AM
Countries	Super Admin	empp0001	Delete	19.09.2016 at 07:14 AM
View/Manage Policy Documents	Super Admin	empp0001	Edit	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.

- e. 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:

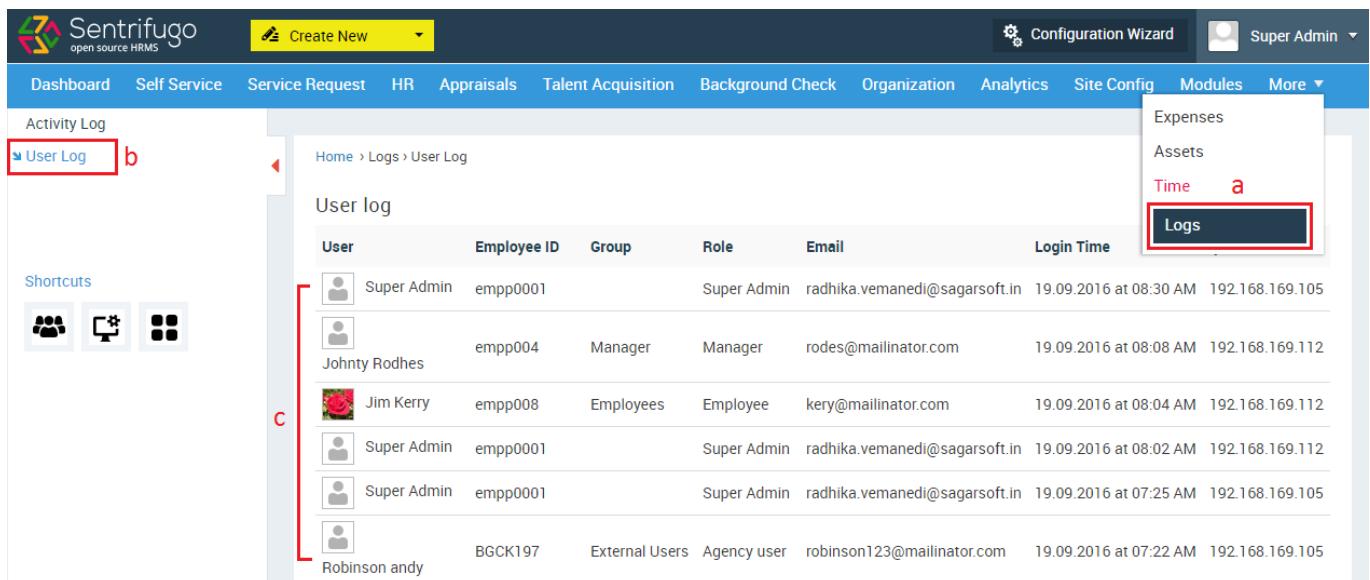


The screenshot shows a modal window titled "Categories - Edit". It contains a table with one row. The columns are "User", "Employee ID", "Date", and "Record". The "User" column shows a user icon and the text "Super Admin". The "Employee ID" column shows "empp0001". The "Date" column shows "19.09.2016 at 07:17 AM". The "Record" column shows a blue link "View Record". Below the table is a dropdown menu "Records per page" set to "20". At the bottom left is a blue "CLOSE" button.

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

## 13.2 How do I view User Logs?

*Please refer Figure 155*



The screenshot shows the Sentrifugo application interface. The top navigation bar includes "Create New", "Configuration Wizard", "Super Admin", and various module links like Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, Modules, and More. A dropdown menu under "More" shows options like Expenses, Assets, Time, and Logs, with "Logs" highlighted by a red box and labeled "a". The left sidebar has "Activity Log" and "User Log" buttons, with "User Log" highlighted by a red box and labeled "b". The main content area shows a "User log" table with columns: User, Employee ID, Group, Role, Email, and Login Time. The table lists several entries, with the last entry "Robinson andy" highlighted by a red box and labeled "c".

Figure 155

- Click on Logs in the top menu
- Click on User log in the left panel
- 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.

## 14.1 How do I add an Expense Category?

Please refer Figure 156

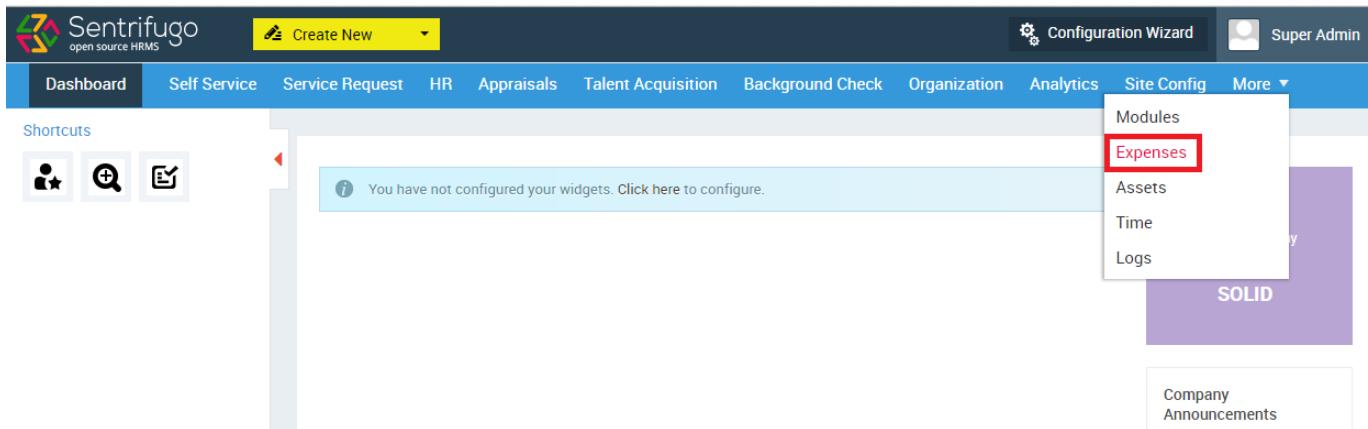
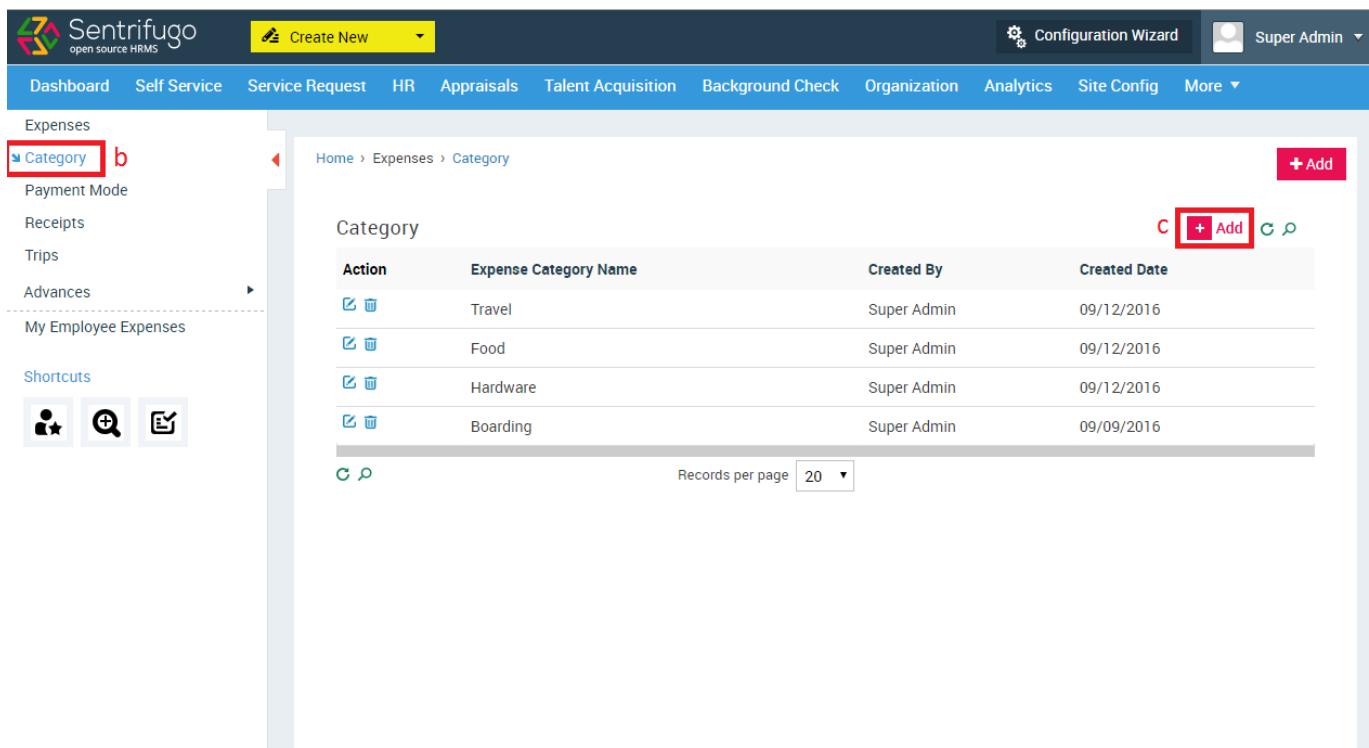


Figure 156

- Click **Expenses** in the top menu

Please refer Figure 157



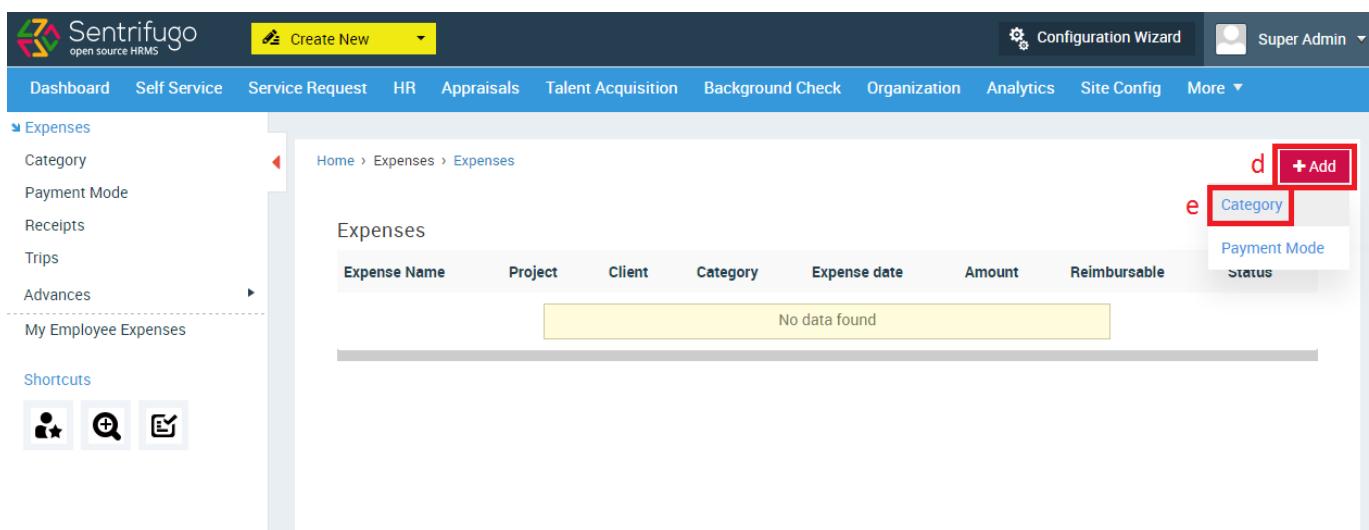
Action	Expense Category Name	Created By	Created Date
[Edit]	Travel	Super Admin	09/12/2016
[Edit]	Food	Super Admin	09/12/2016
[Edit]	Hardware	Super Admin	09/12/2016
[Edit]	Boarding	Super Admin	09/09/2016

Figure 157

- b. Click **Category** on the left menu panel
- c. Click **+Add** button on the right side

Or

Please refer Figure 158



Expense Name	Project	Client	Category	Expense date	Amount	Reimbursable	Status
No data found							

Figure 158

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

Please refer Figure 159

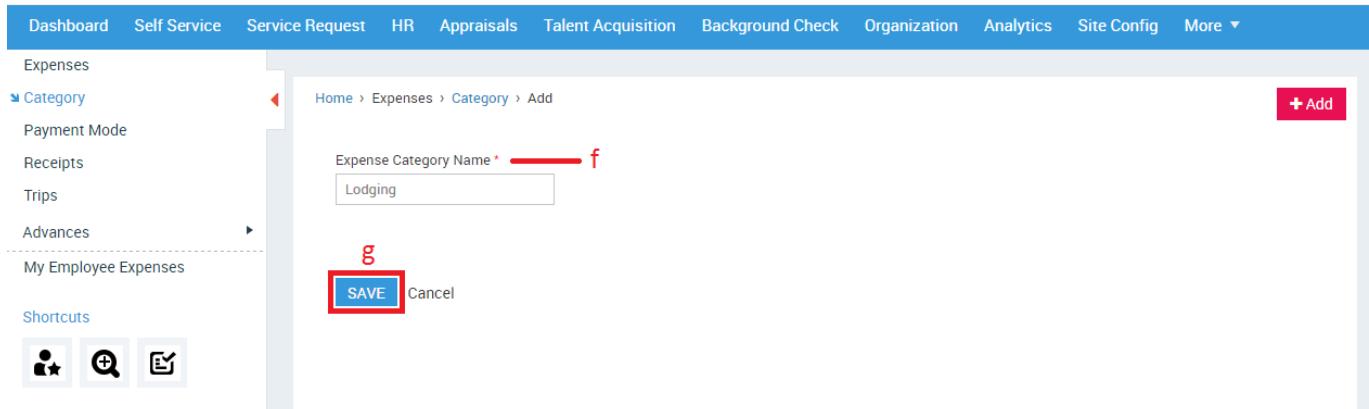


Figure 159

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

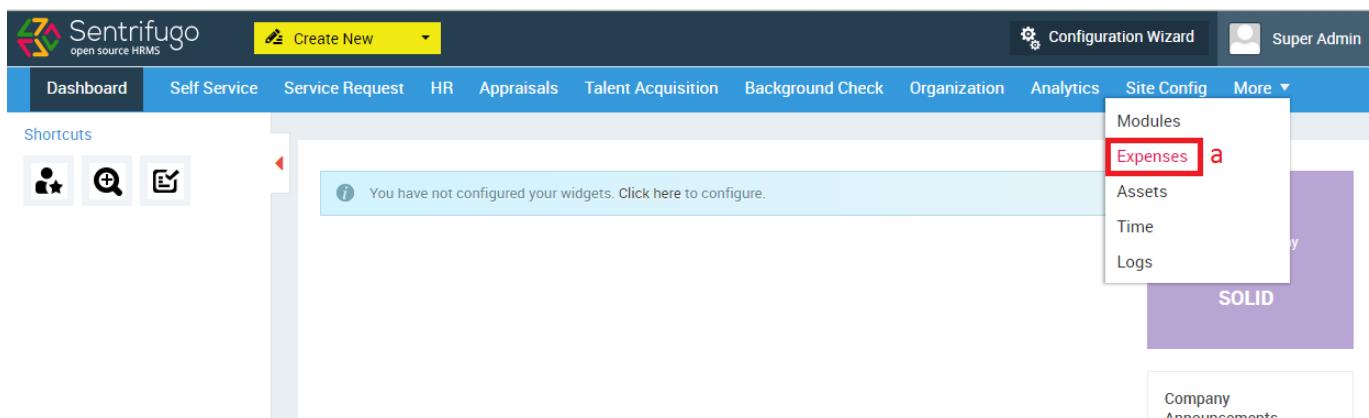
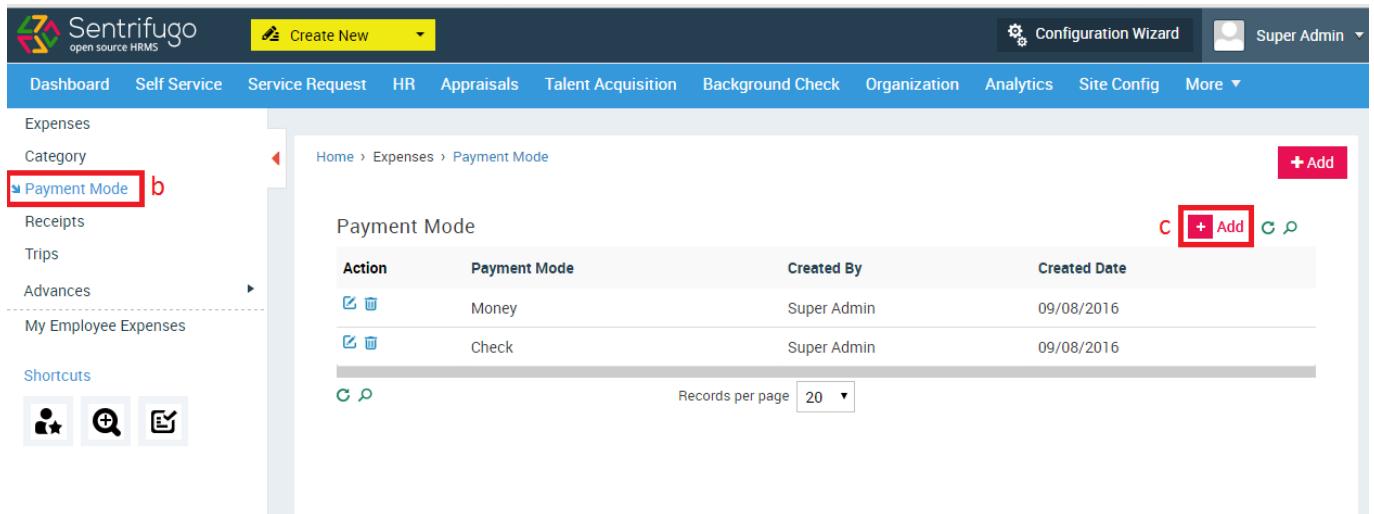


Figure 160

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

Please refer Figure 161



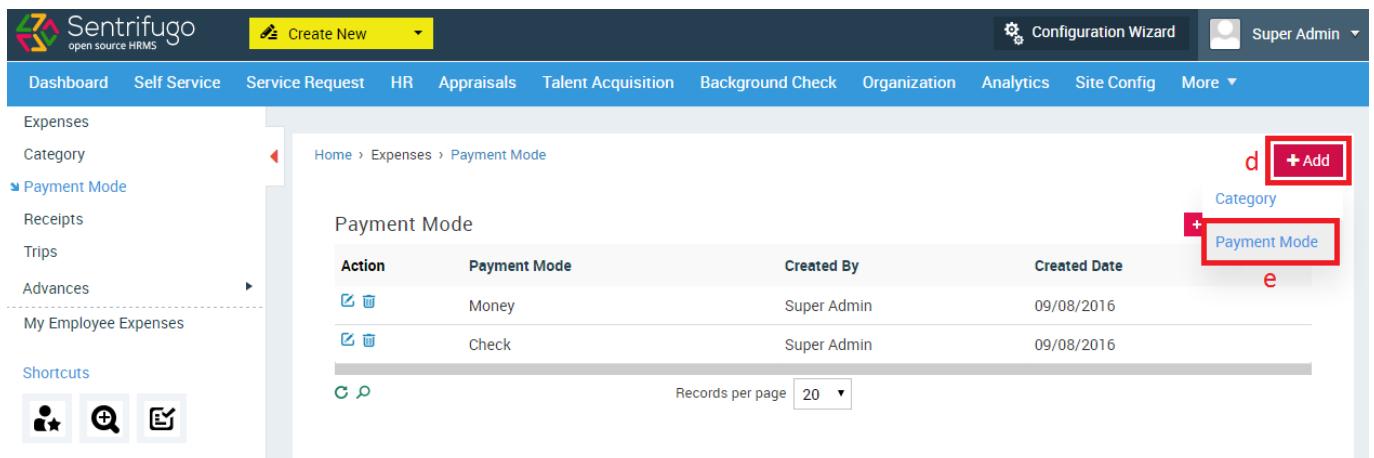
Action	Payment Mode	Created By	Created Date
	Money	Super Admin	09/08/2016
	Check	Super Admin	09/08/2016

Figure 161

- b. Click **Payment Mode** on the left menu panel
- c. 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

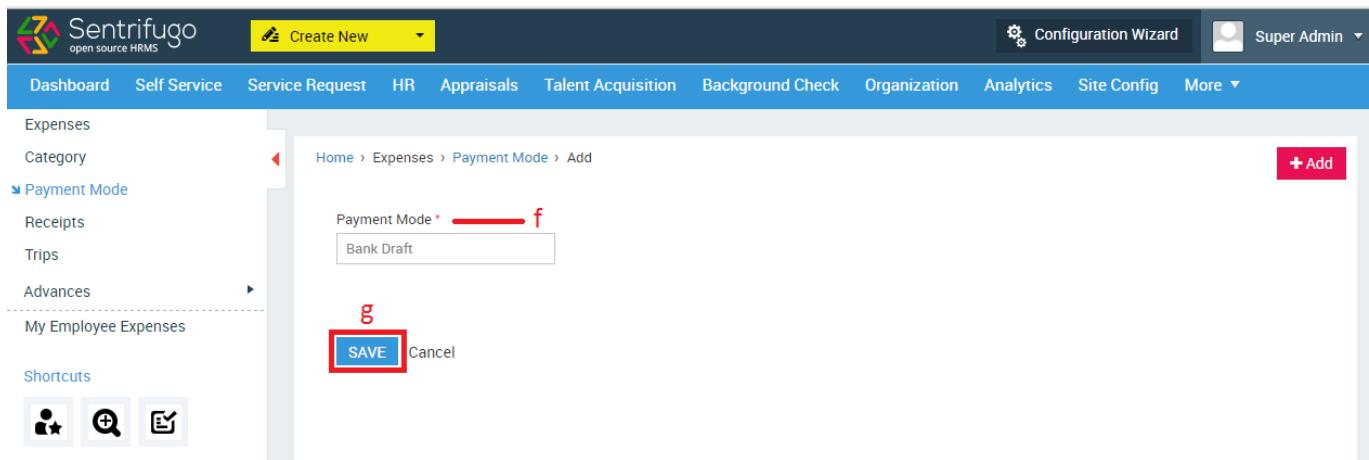


Figure 163

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

### 14.3 How do I add an Expense?

*Please refer Figure 164*

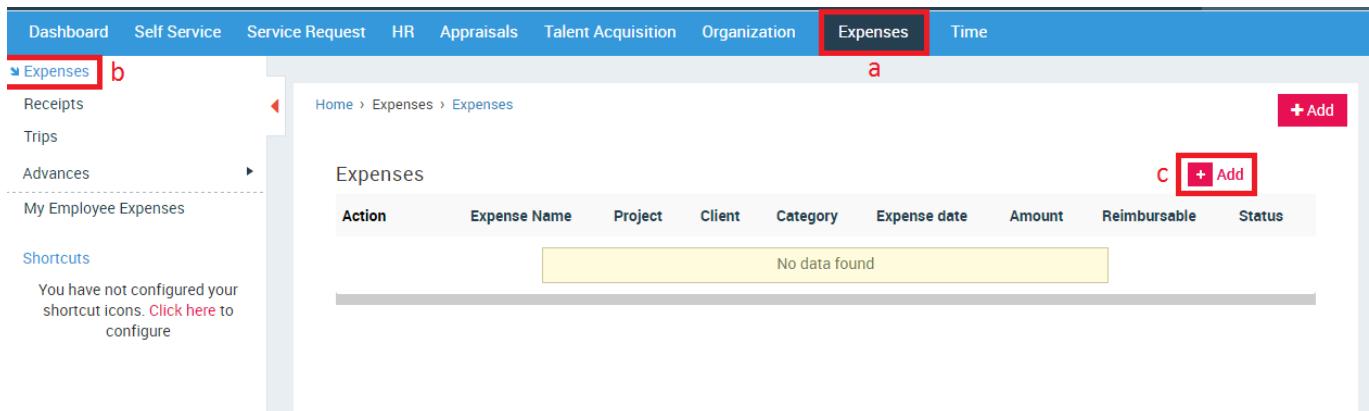
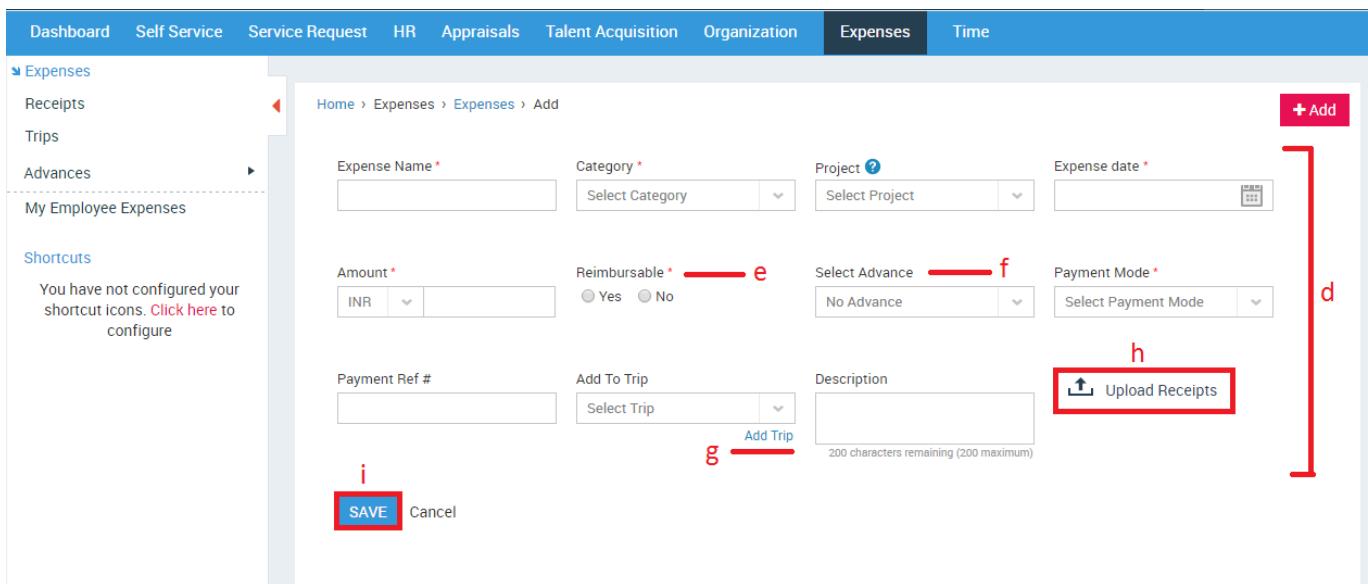


Figure 164

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

*Please refer Figure 165*



The screenshot shows the 'Expenses' add form. A red bracket labeled 'd' spans the right side of the form, covering fields for Project, Expense date, Amount, Reimbursable, Select Advance, Payment Mode, and a large 'Upload Receipts' button. A red arrow labeled 'e' points to the 'Reimbursable' field, which has two radio buttons: 'Yes' and 'No'. A red arrow labeled 'f' points to the 'Select Advance' dropdown, showing 'No Advance' as the selected option. A red arrow labeled 'g' points to the 'Add Trip' link next to the 'Select Trip' dropdown. A red arrow labeled 'h' points to the 'Upload Receipts' button. A red bracket labeled 'i' covers the 'SAVE' and 'Cancel' buttons at the bottom.

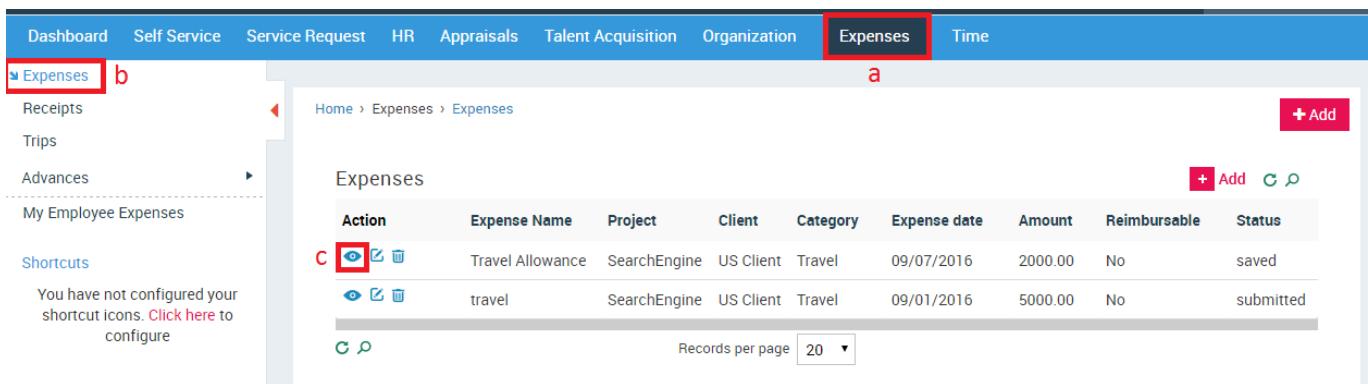
Figure 165

- d. Enter the required details
- e. Not functional in the current version
- f. 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).
- g. 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
- h. 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*



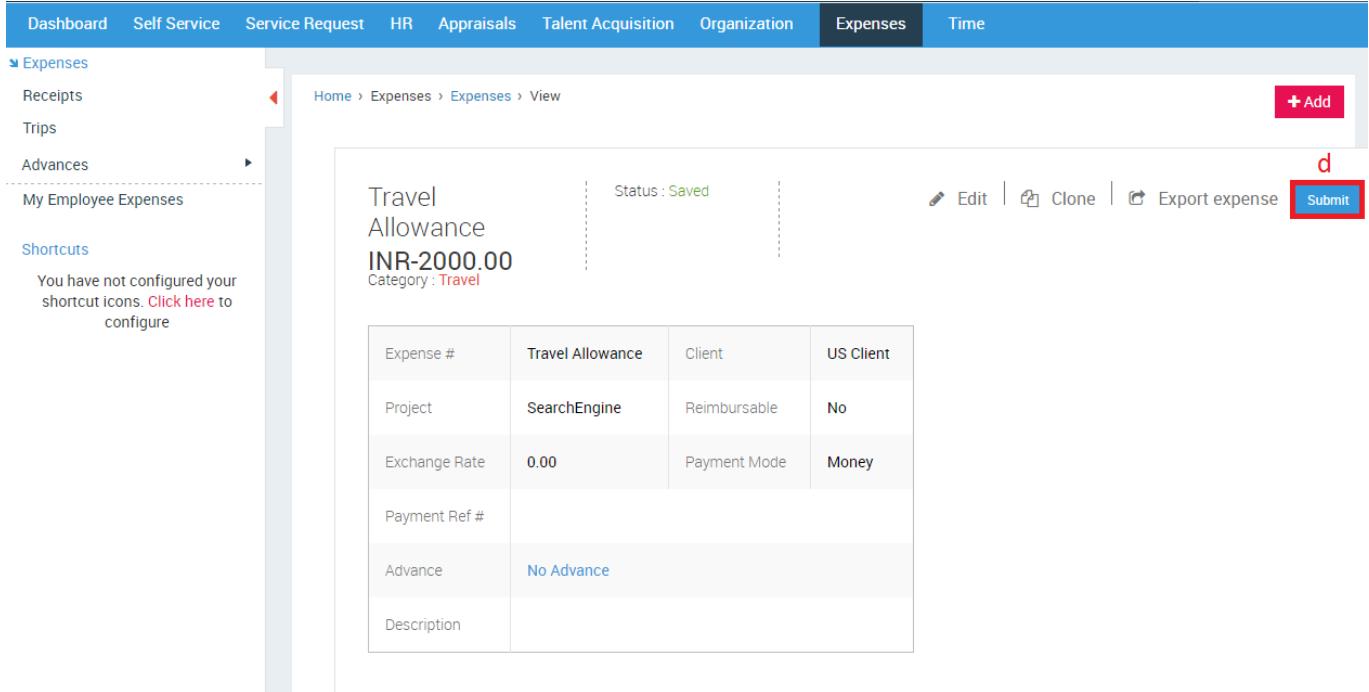
The screenshot shows the 'Expenses' list page. A red box labeled 'b' highlights the 'Expenses' link in the top navigation bar. A red box labeled 'a' highlights the 'Expenses' tab in the top menu. A red box labeled 'c' highlights the first row of the table, which contains columns for Action, Expense Name, Project, Client, Category, Expense date, Amount, Reimbursable, and Status. The first row shows 'Travel Allowance' for 'SearchEngine' under 'US Client' in the 'Travel' category, submitted on 09/07/2016 for 2000.00, marked as 'No' for reimbursable, and 'saved' for status. The second row shows 'travel' for 'SearchEngine' under 'US Client' in the 'Travel' category, submitted on 09/01/2016 for 5000.00, marked as 'No' for reimbursable, and 'submitted' for status.

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



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses (which is selected and highlighted in dark blue), and Time. On the left, a sidebar menu lists Expenses, Receipts, Trips, Advances, My Employee Expenses, and Shortcuts (with a note about unconfigured icons). The main content area displays a travel allowance expense record with the following details:

- Travel Allowance**
- INR-2000.00**
- Status : Saved**
- Category : Travel**

A table below shows more details:

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 view, there are buttons for Edit, Clone, Export expense, and Submit (which is highlighted with a red box).

Figure 167

- d. Click **Submit** button

A confirmation message will be displayed.

Please refer Figure 168

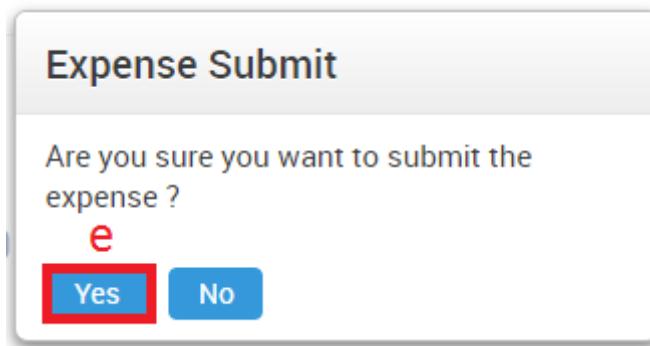


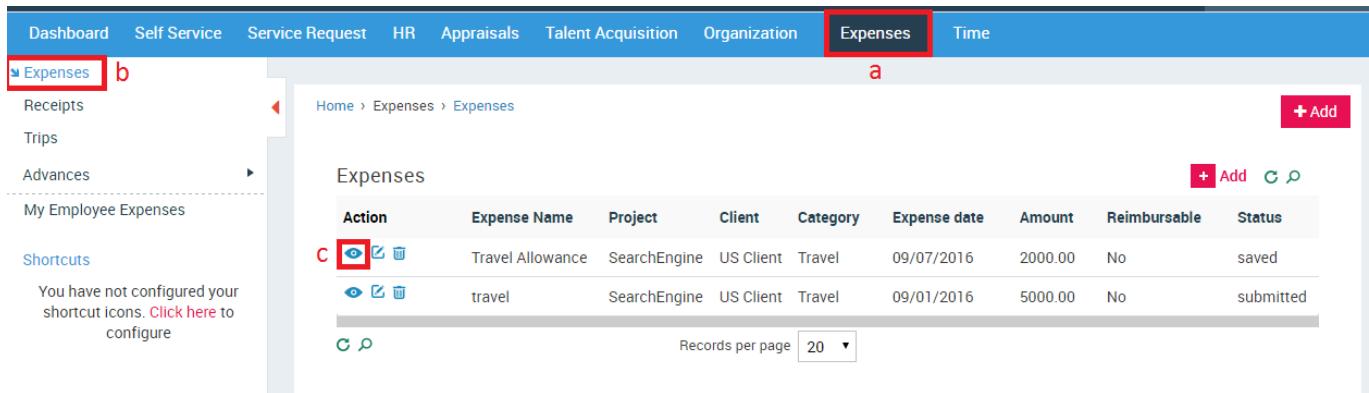
Figure 168

- 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

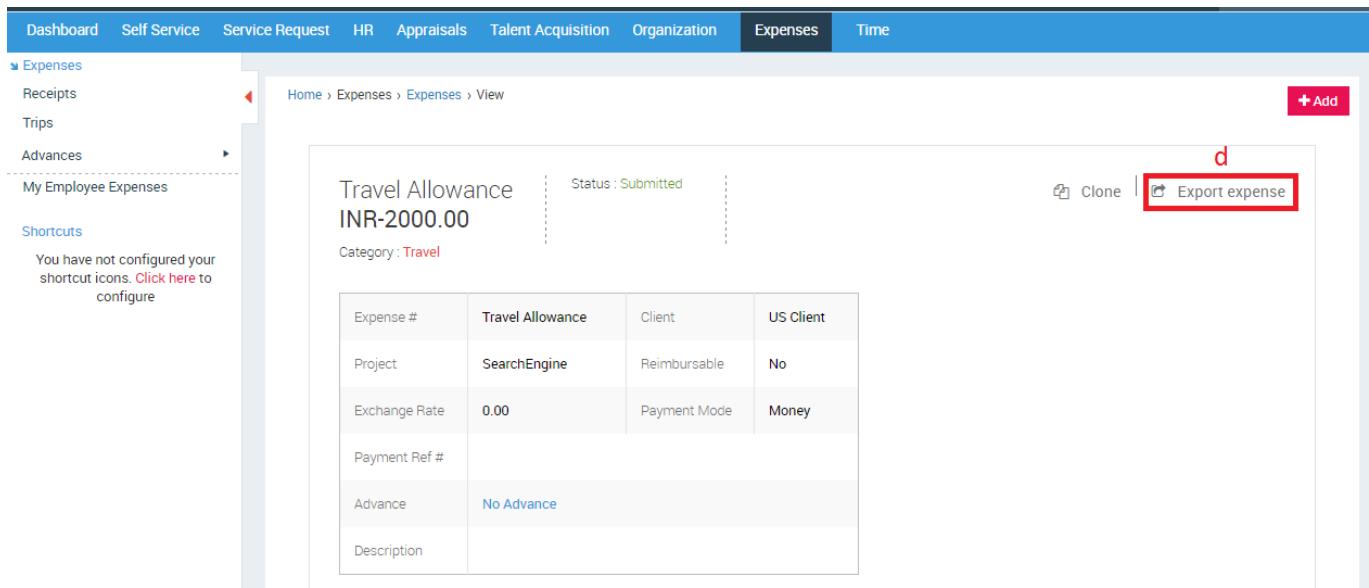


Action	Expense Name	Project	Client	Category	Expense date	Amount	Reimbursable	Status
	Travel Allowance	SearchEngine	US Client	Travel	09/07/2016	2000.00	No	saved
	travel	SearchEngine	US Client	Travel	09/01/2016	5000.00	No	submitted

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



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

Figure 170

- Click Export expense button

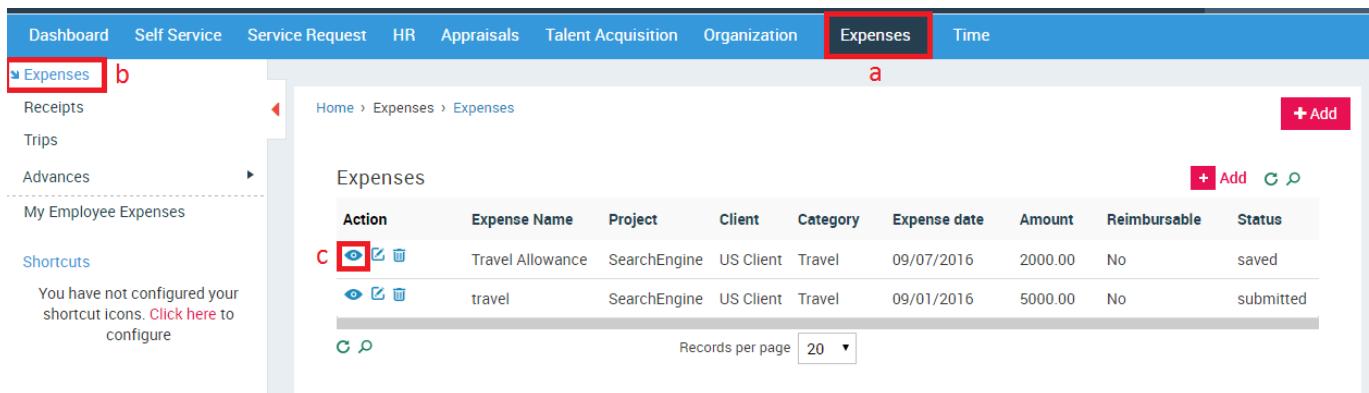
An expense report in PDF format will be downloaded.

## 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*

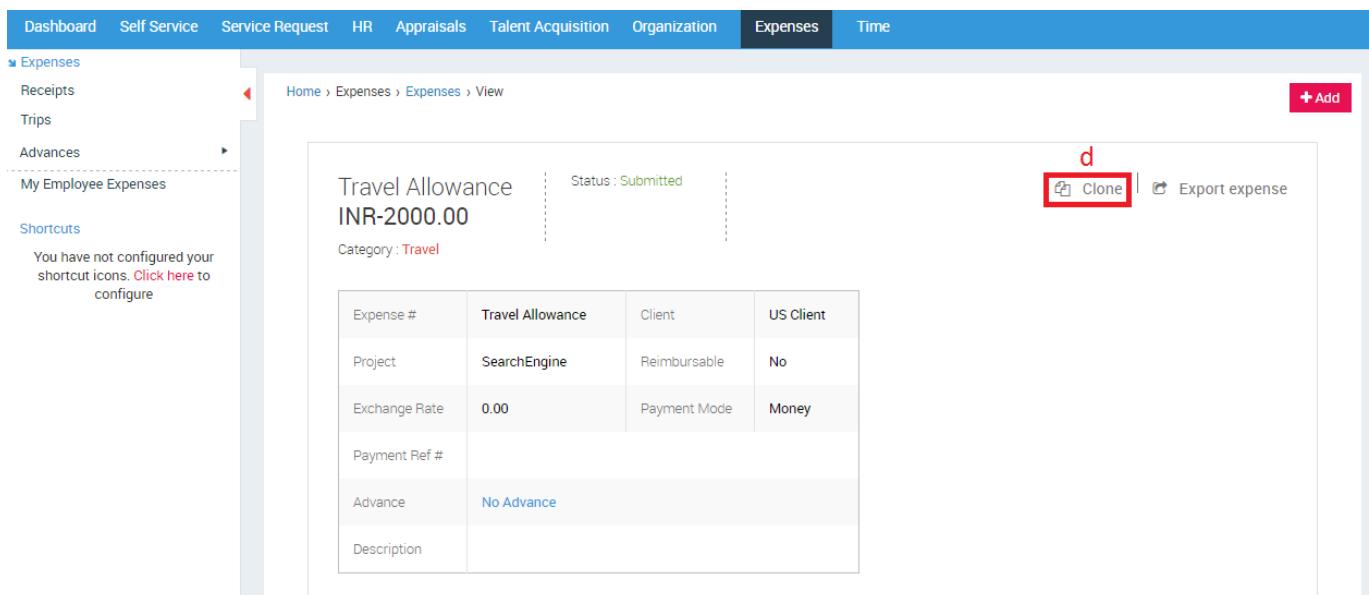


Action	Expense Name	Project	Client	Category	Expense date	Amount	Reimbursable	Status
	Travel Allowance	SearchEngine	US Client	Travel	09/07/2016	2000.00	No	saved
	travel	SearchEngine	US Client	Travel	09/01/2016	5000.00	No	submitted

Figure 171

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

*Please refer Figure 172*



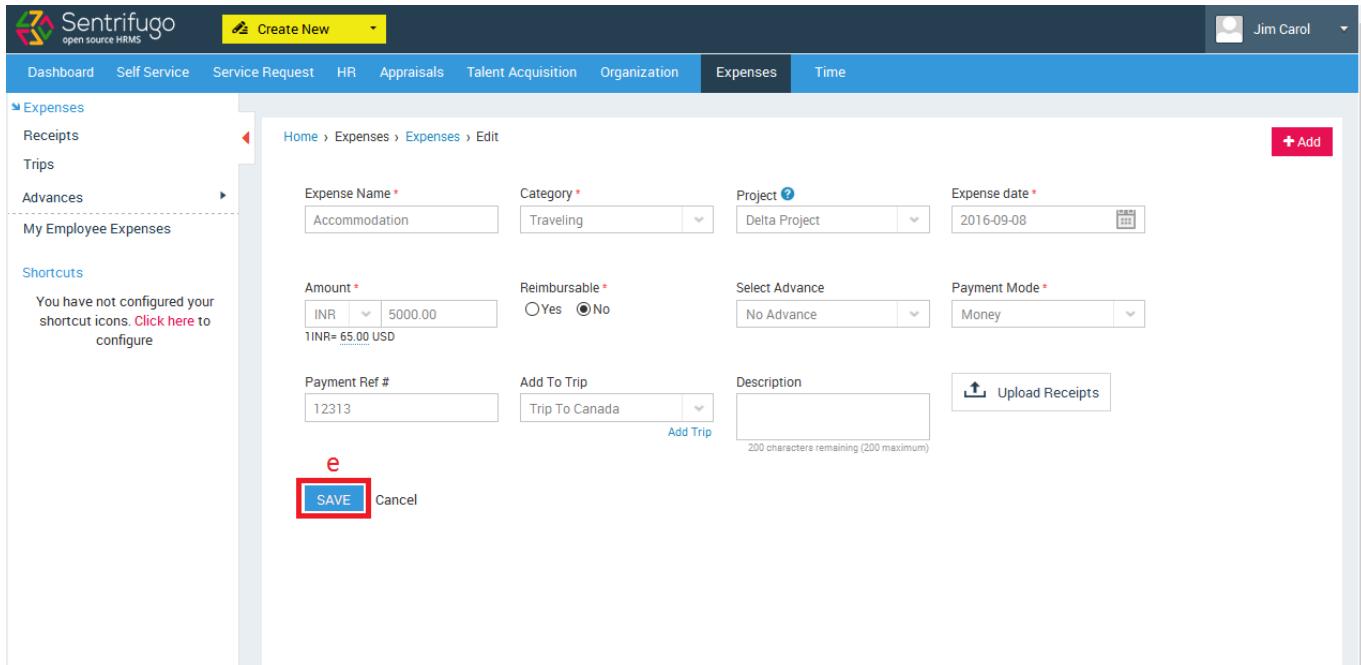
Expense #	Travel Allowance	Client	US Client
Project	SearchEngine	Reimbursable	No
Exchange Rate	0.00	Payment Mode	Money
Payment Ref #			
Advance	No Advance		
Description			

Figure 172

- 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



Expense Name \*: Accommodation

Category \*: Traveling

Project ?: Delta Project

Expense date \*: 2016-09-08

Amount \*: INR 5000.00

Reimbursable \*: Yes

Select Advance: No Advance

Payment Mode \*: Money

Payment Ref #: 12313

Add To Trip: Trip To Canada

Description: Trip To Canada

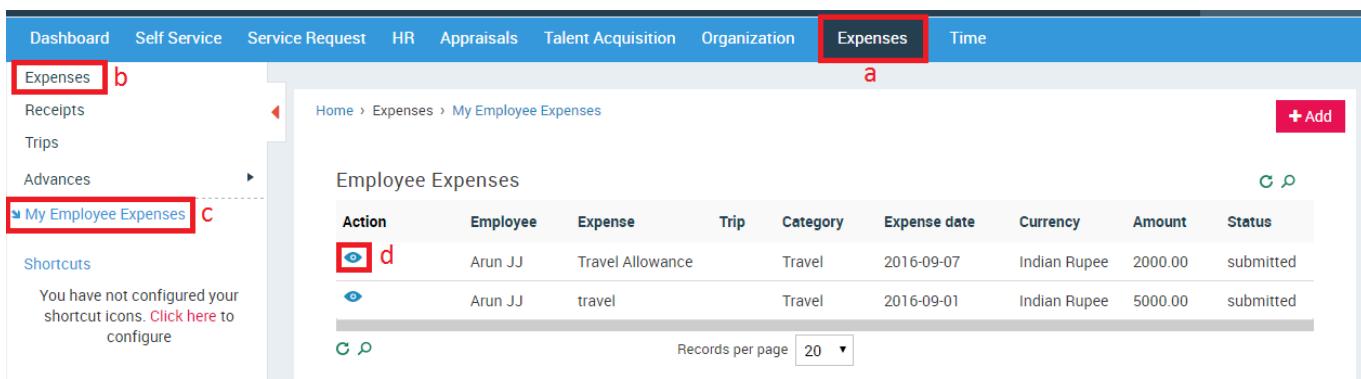
**SAVE**

Figure 173

- Click **SAVE** button

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

Please refer Figure 174



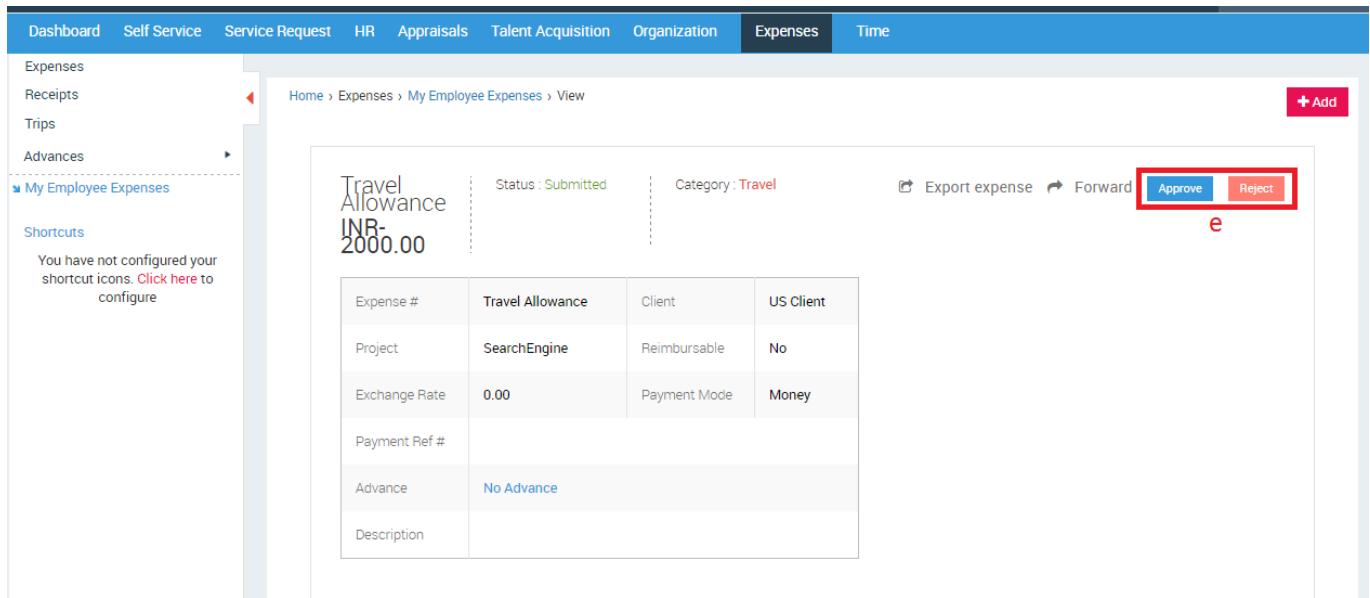
Employee Expenses

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

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, Talent Acquisition, Organization, Expenses (selected), and Time. On the left sidebar, there are links for Expenses, Receipts, Trips, Advances, My Employee Expenses (which is selected and highlighted in blue), and Shortcuts. A message in the shortcuts section says: "You have not configured your shortcut icons. Click here to configure". The main content area displays a travel allowance expense with the amount INR-2000.00. The status is "Submitted" and the category is "Travel". Action buttons include Export expense, Forward, Approve (highlighted with a red box), Reject, and a plus sign for adding new expenses.

Figure 175

e. Click **Approve/Reject**

A confirmation message will be displayed.

Please refer Figure 176

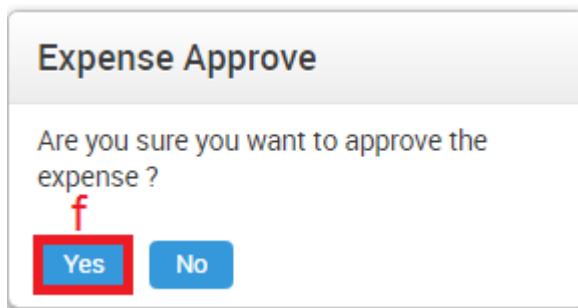
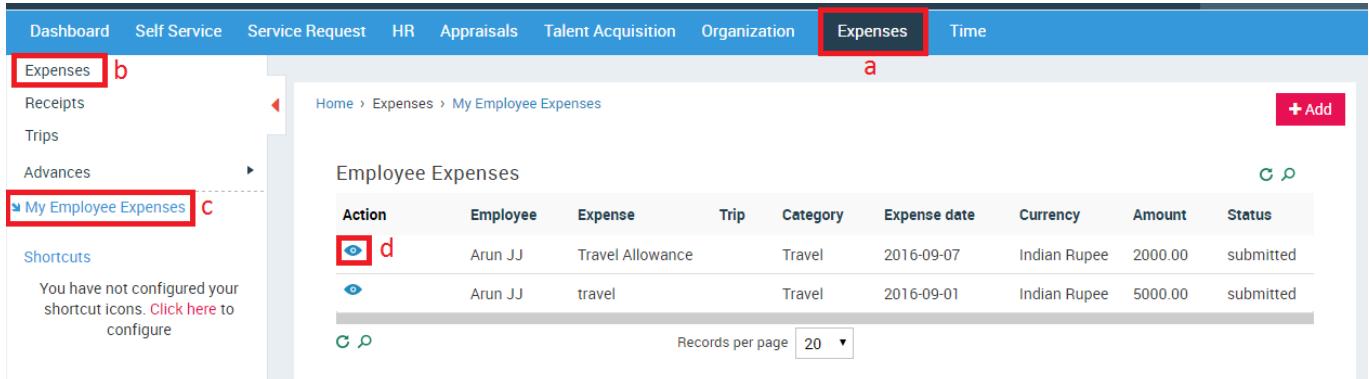


Figure 176

f. Click **Yes** Button

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

Please refer Figure 177

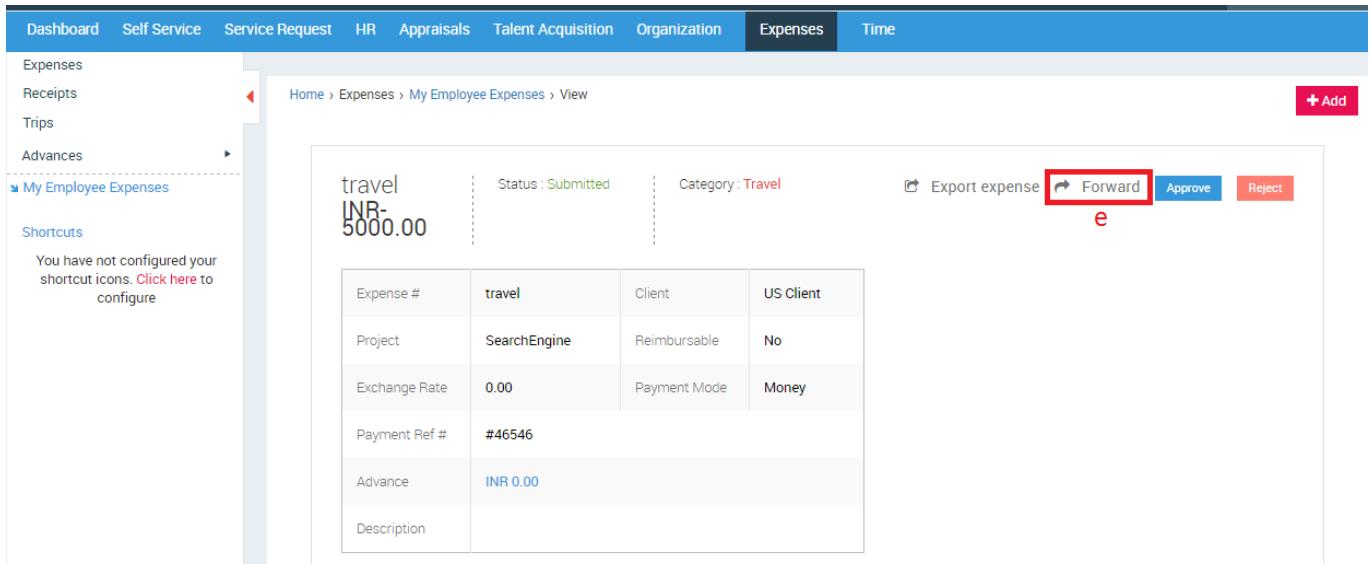


Action	Employee	Expense	Trip	Category	Expense date	Currency	Amount	Status
	Arun JJ	Travel Allowance	Travel	Travel	2016-09-07	Indian Rupee	2000.00	submitted
	Arun JJ	travel	Travel	Travel	2016-09-01	Indian Rupee	5000.00	submitted

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



Expense #	travel	Client	US Client
Project	SearchEngine	Reimbursable	No
Exchange Rate	0.00	Payment Mode	Money
Payment Ref #	#46546		
Advance	INR 0.00		
Description			

Figure 178

- Click **Forward** option

A small pop up window will open

Please refer Figure 178

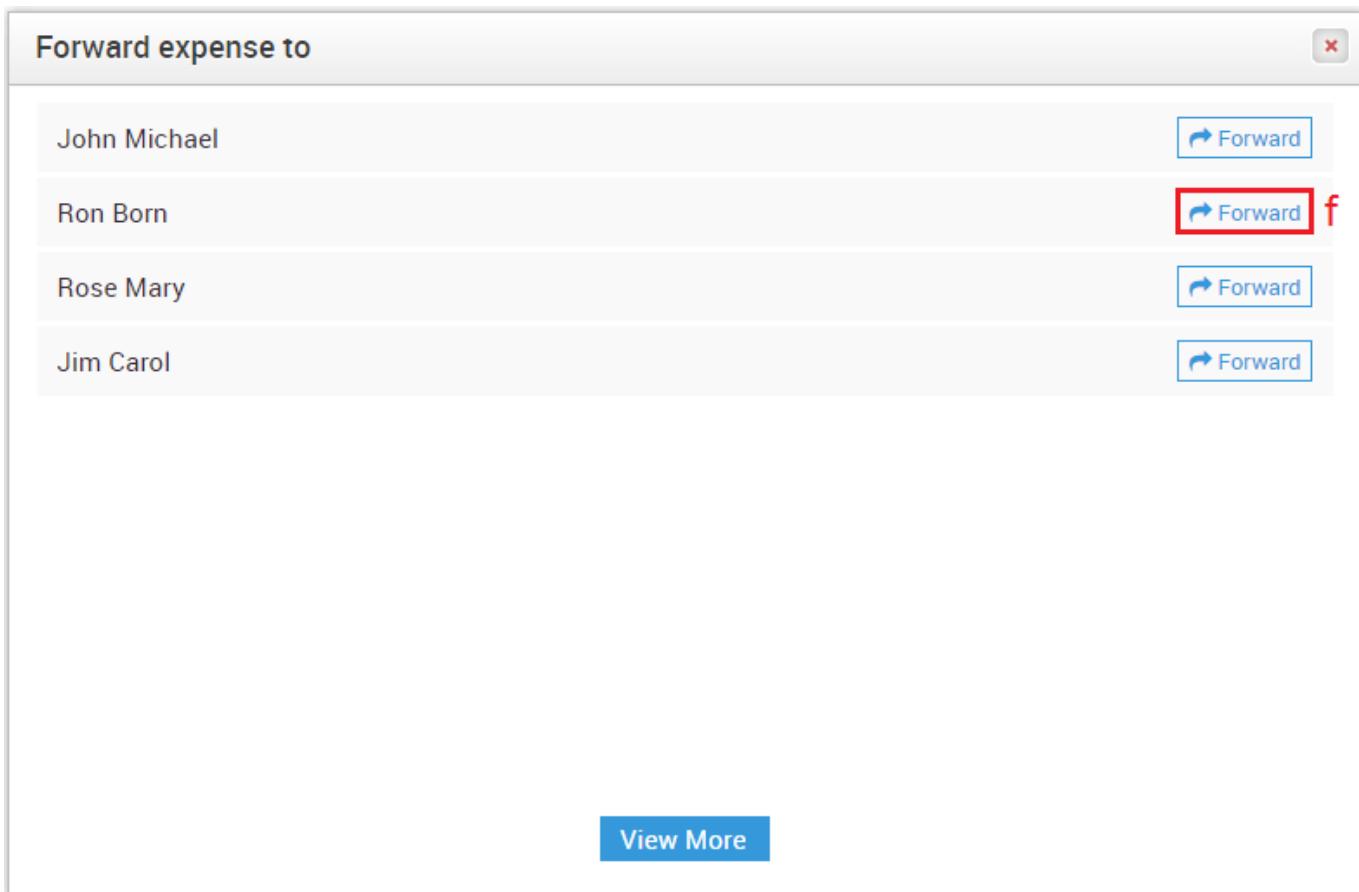


Figure 178

- 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

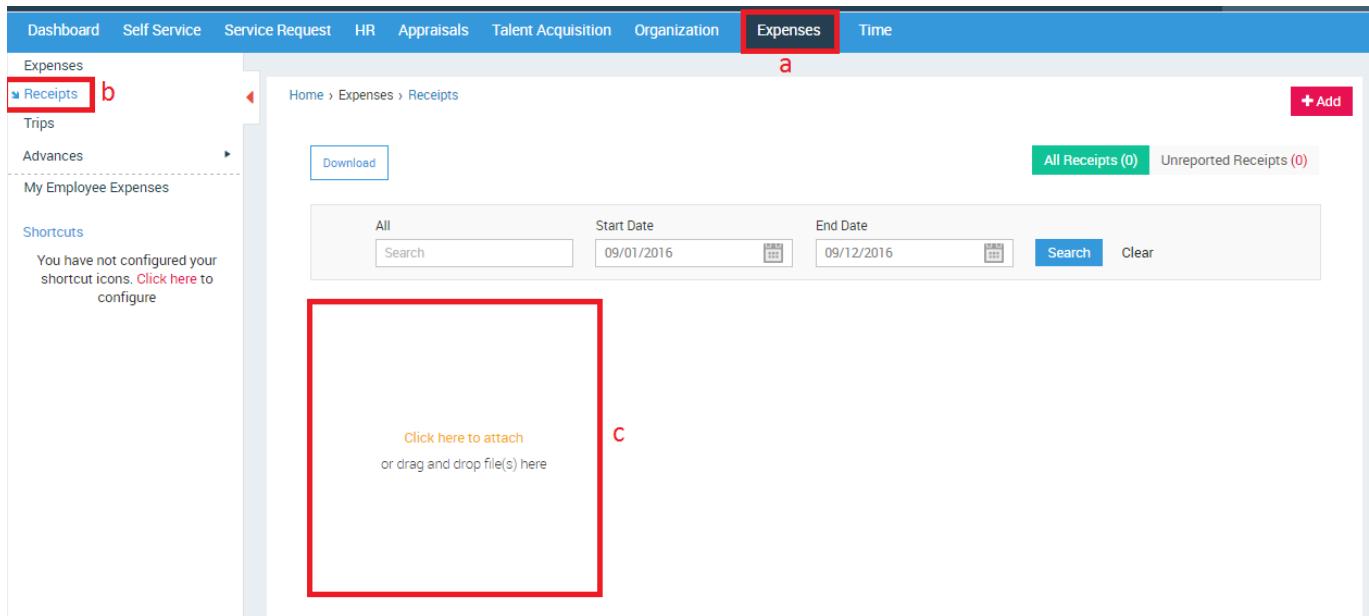


Figure 179

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

## 14.10 How do I download my Receipts?

Please refer Figure 180

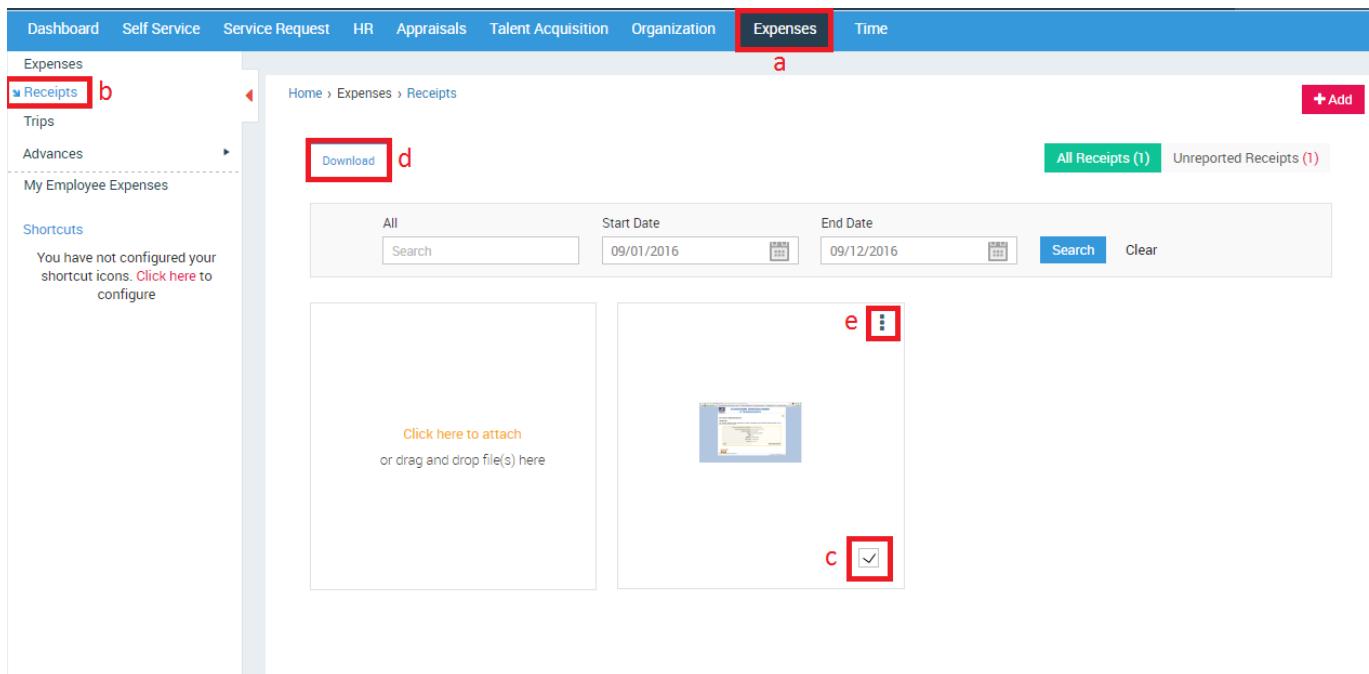


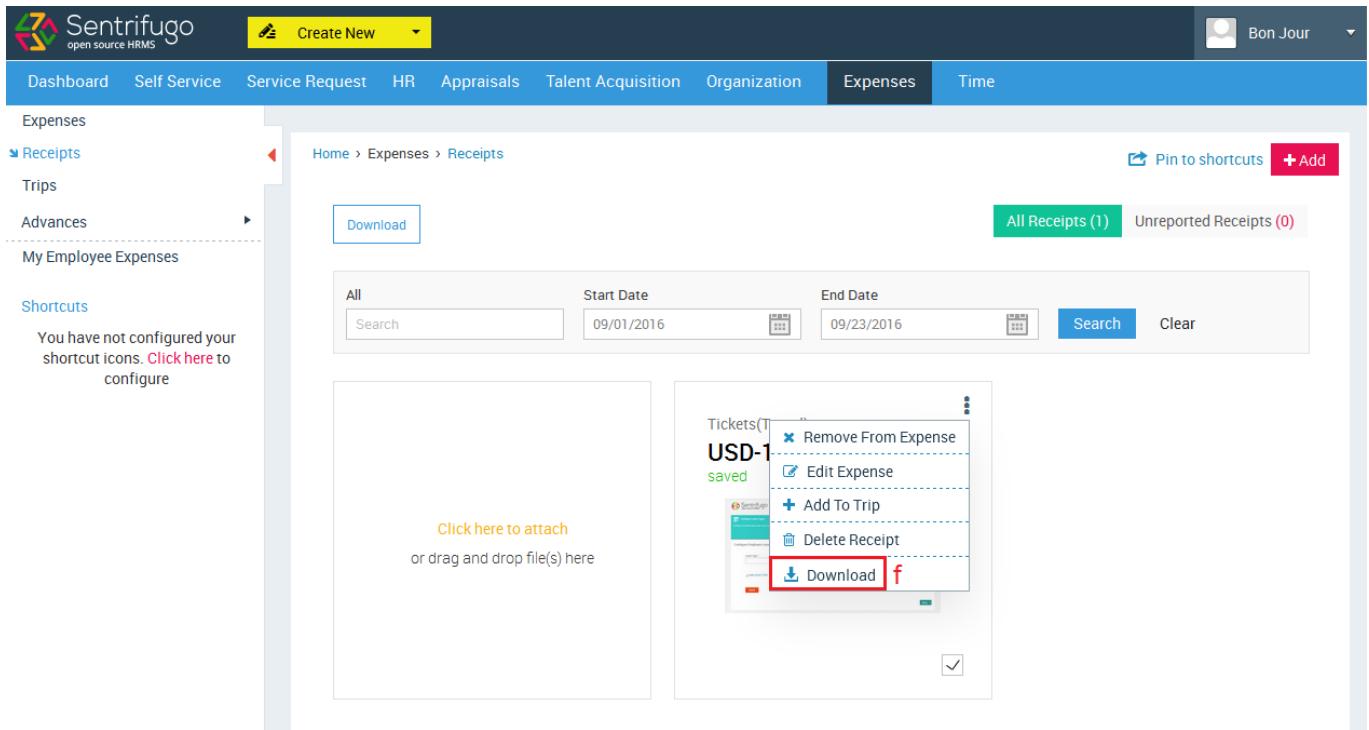
Figure 180

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

Or

- Click **More Action** icon

Please refer Figure 181



The screenshot shows the Sentrifugo web interface for managing expenses. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses (selected), and Time. A user profile icon and the text "Bon Jour" are also present. The left sidebar has sections for Expenses, Receipts (selected), Trips, Advances, and My Employee Expenses. Under Receipts, there is a note about未配置快捷图标. The main content area shows a breadcrumb path: Home > Expenses > Receipts. It features a "Download" button, search filters for All, Start Date (09/01/2016), and End Date (09/23/2016), and buttons for "Search" and "Clear". Below these are two columns: one for attachments ("Click here to attach or drag and drop file(s) here") and one for actions. A context menu is open over a receipt labeled "USD-1 saved", listing options: Remove From Expense, Edit Expense, Add To Trip, Delete Receipt, and Download (which is highlighted with a red box). Buttons for "All Receipts (1)" and "Unreported Receipts (0)" are at the bottom right.

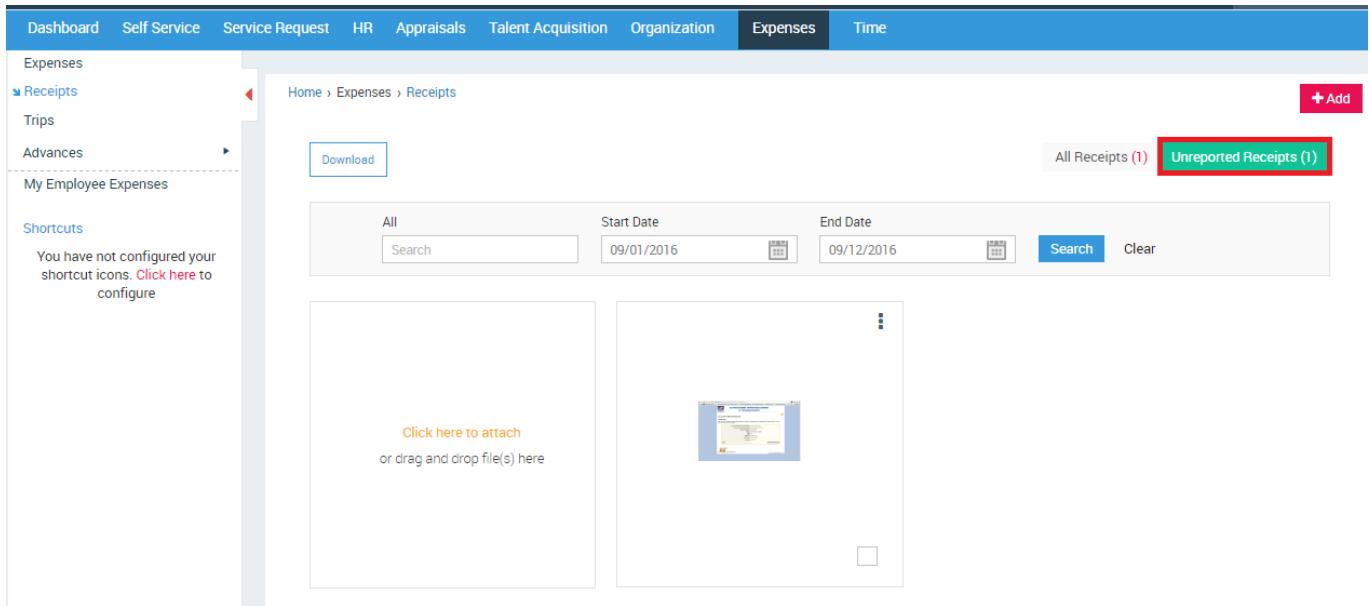
Figure 181

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*



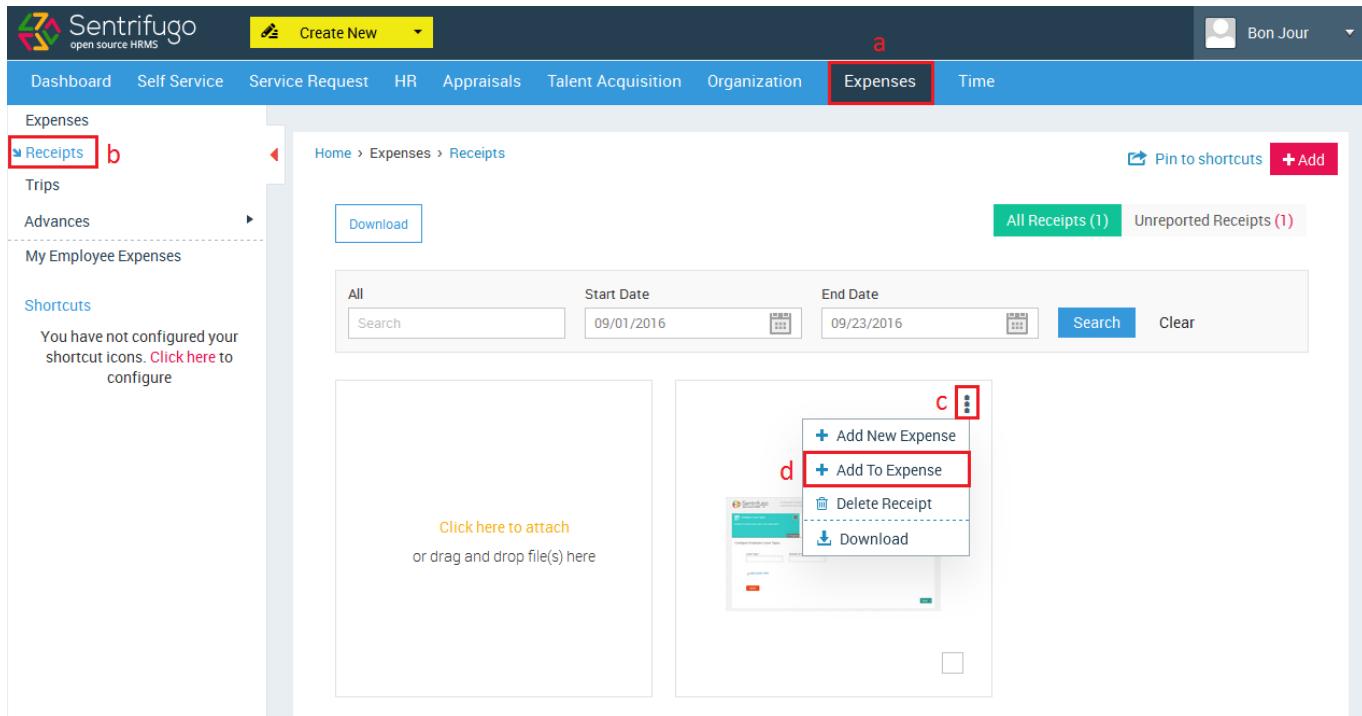
This screenshot shows the same Sentrifugo interface as Figure 181, but with a different focus. The "Unreported Receipts (1)" button in the top right corner is highlighted with a red box. The main content area displays a receipt titled "Unreported Receipts (1)" with a thumbnail preview. The rest of the interface, including the sidebar and search filters, appears identical to Figure 181.

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*



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes a logo, a 'Create New' button, and user information ('Bon Jour'). The main menu has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses (which is highlighted with a red box 'a'), and Time. On the left sidebar, there are links for Expenses (Receipts, Trips, Advances), My Employee Expenses, and Shortcuts (with a note about configuring icons). 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 (09/23/2016), and buttons for 'All Receipts (1)', 'Unreported Receipts (1)', 'Pin to shortcuts', and '+ Add'. Below these are two large input fields for attachments, with instructions to 'Click here to attach' or 'drag and drop file(s) here'. A context menu is open over a thumbnail of a receipt, listing options: '+ Add New Expense', '+ Add To Expense' (which is highlighted with a red box 'c'), 'Delete Receipt', and 'Download'. Step numbers 'd' are placed next to the 'Add To Expense' and 'Delete Receipt' options.

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*

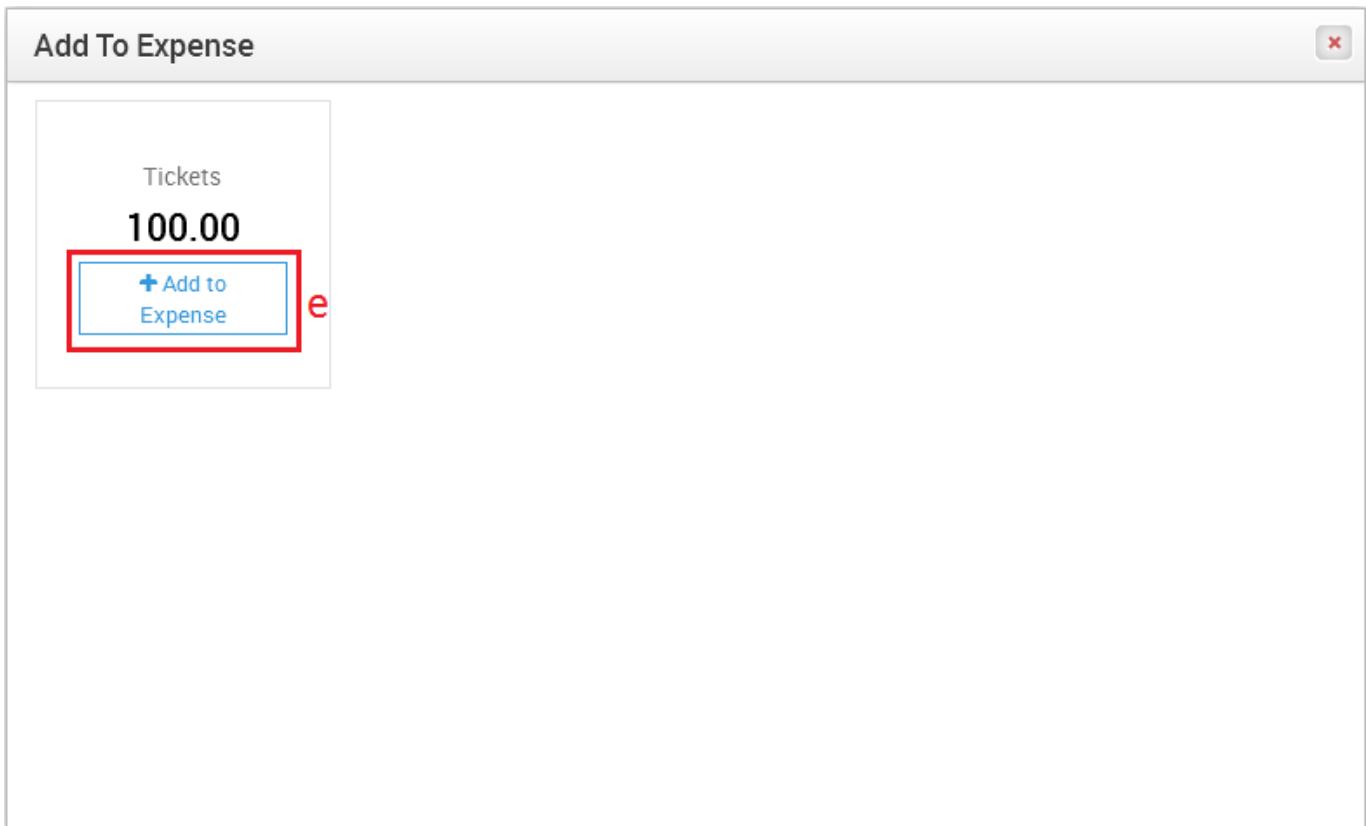
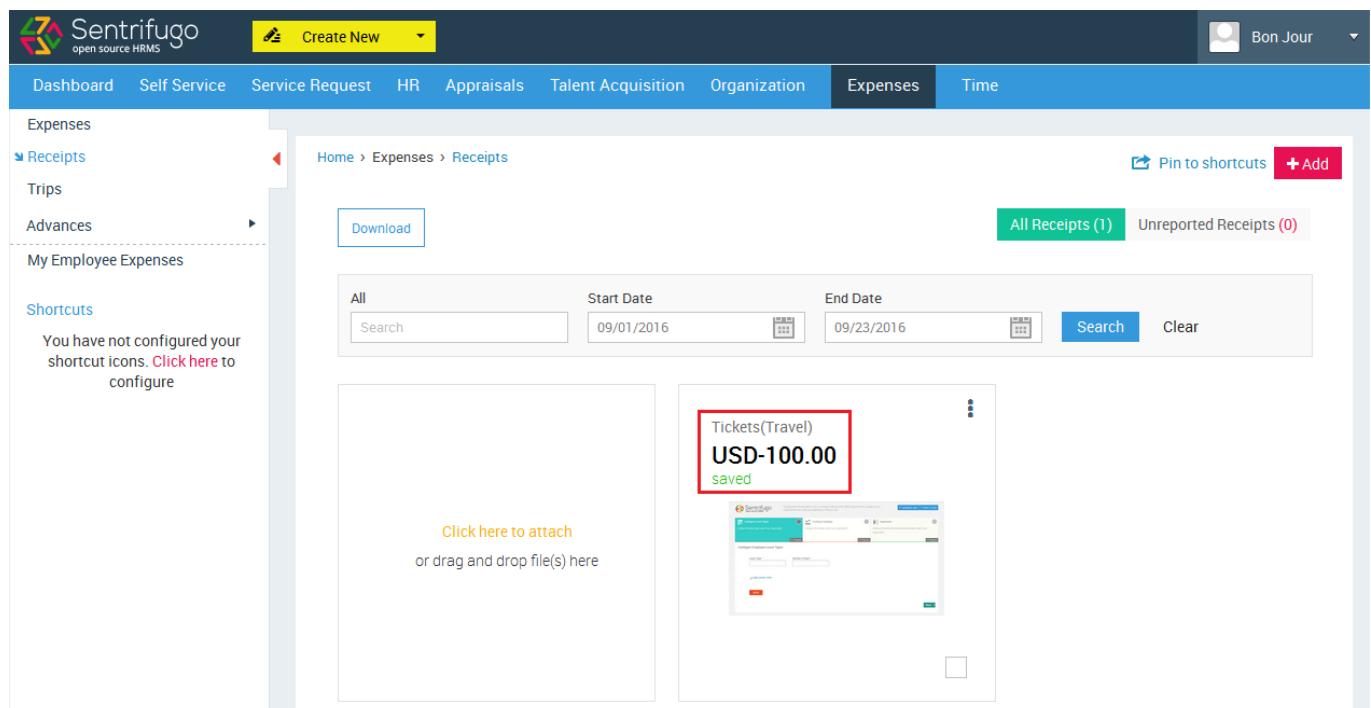


Figure 184

e. Click Add to Expense.



The screenshot shows the Sentrifugo interface for managing expenses. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses (which is selected), and Time. On the left sidebar, there are sections for Expenses, Receipts, Trips, Advances, and My Employee Expenses. Under Shortcuts, a message says: "You have not configured your shortcut icons. Click here to configure". The main content area displays a receipt for "Tickets(Travel)" worth "USD-100.00" with the status "saved". Below the receipt, there is a placeholder for attachments with the text "Click here to attach or drag and drop file(s) here". At the top right of the main content area, there are buttons for "Pin to shortcuts" and "+ Add".

Tip: 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

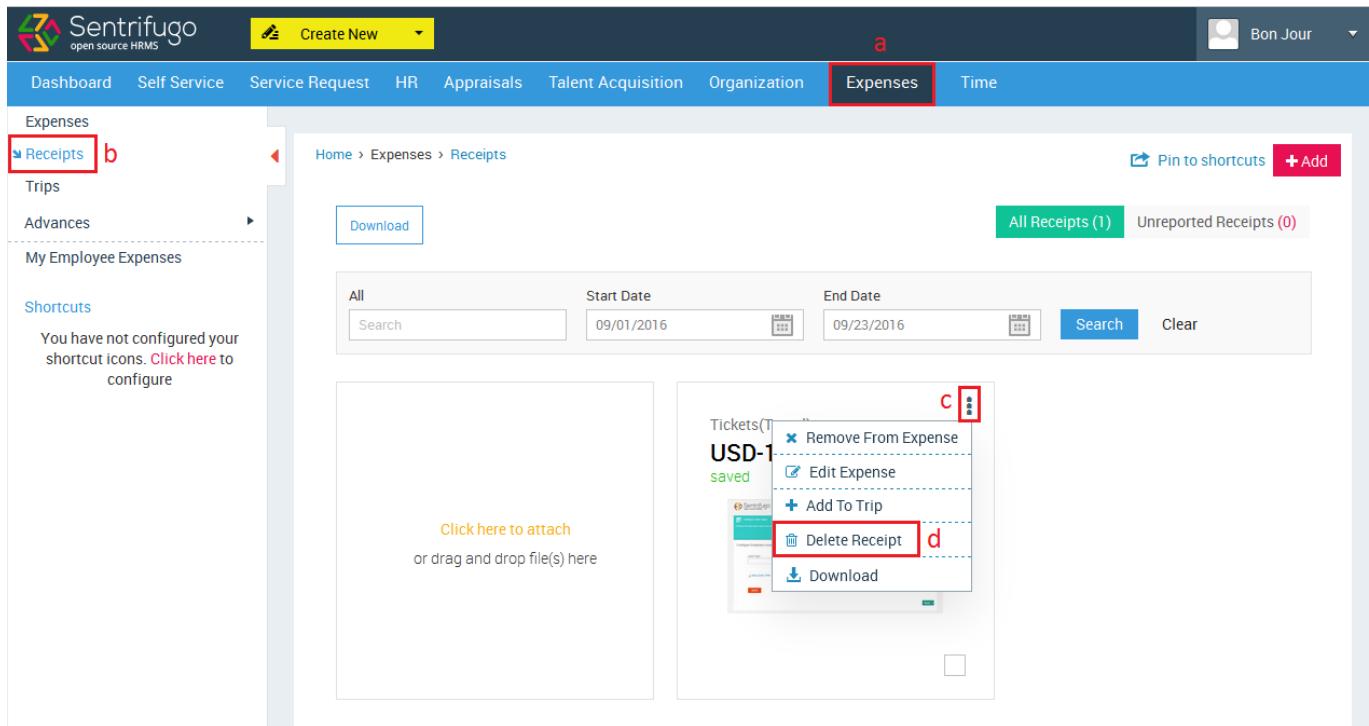


Figure 185

- 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

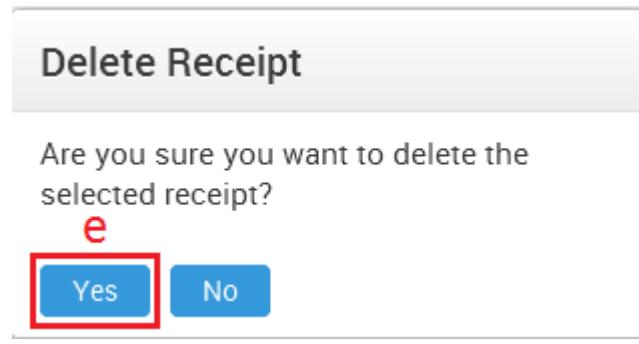


Figure 186

- e. 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*

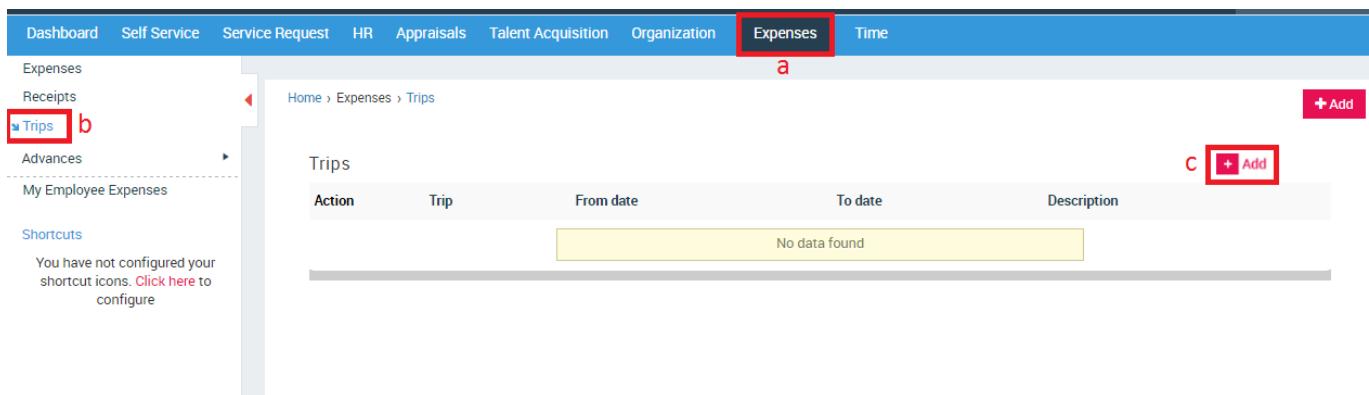


Figure 187

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

*Please refer Figure 188*

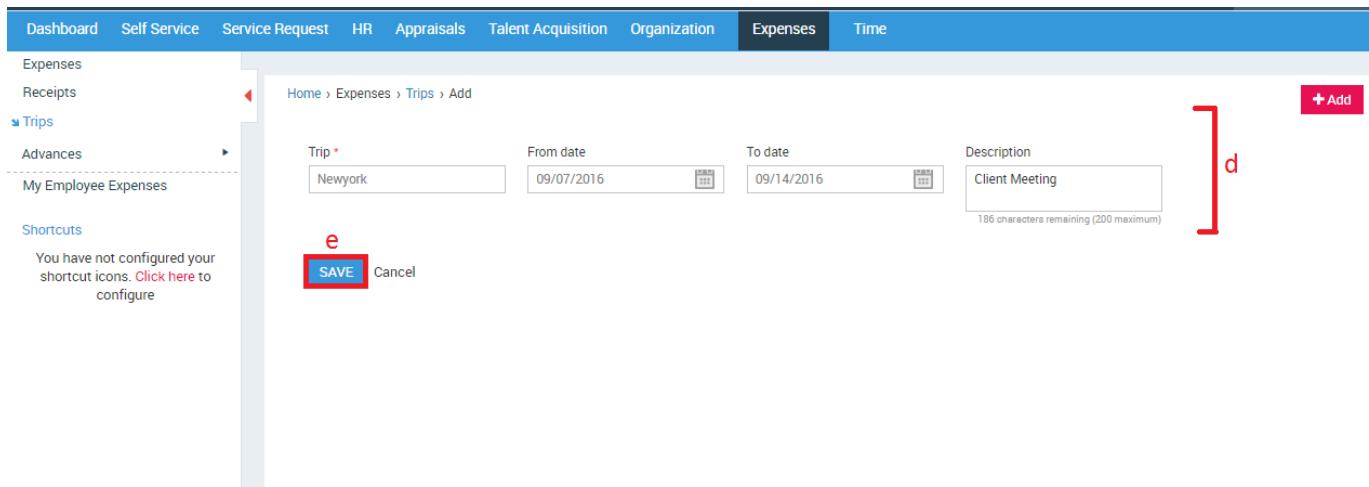


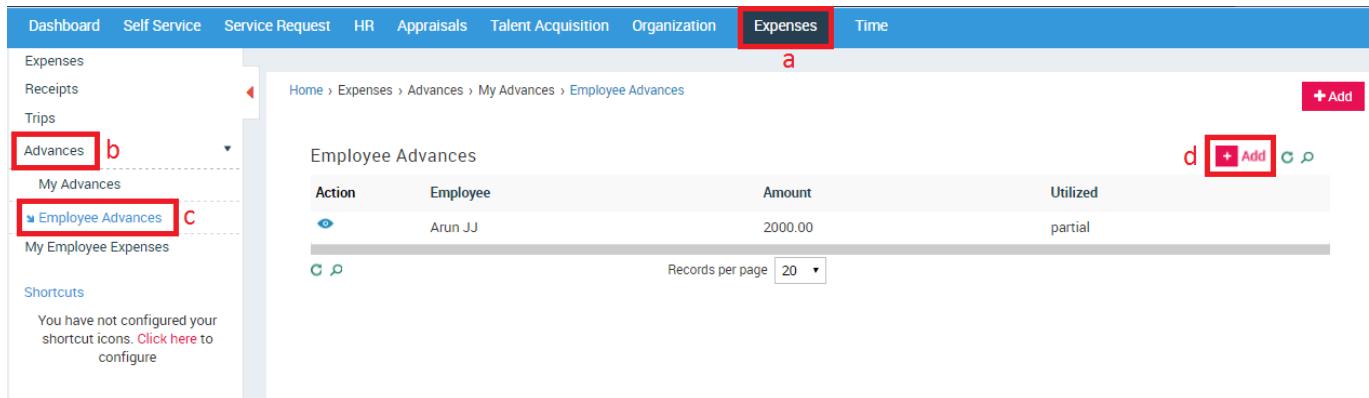
Figure 188

- Enter the required details
- 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 Sentrifugo web application. The top navigation bar has tabs: Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses (which is highlighted in red), and Time. On the left, a sidebar menu includes: Expenses, Receipts, Trips, Advances (highlighted in red), My Advances, Employee Advances (highlighted in red), and My Employee Expenses. A dropdown arrow is shown next to Advances. Below the sidebar is a section titled 'Shortcuts' with a note about configuring icons. The main content area shows a breadcrumb path: Home > Expenses > Advances > My Advances > Employee Advances. It displays a table titled 'Employee Advances' with one record:

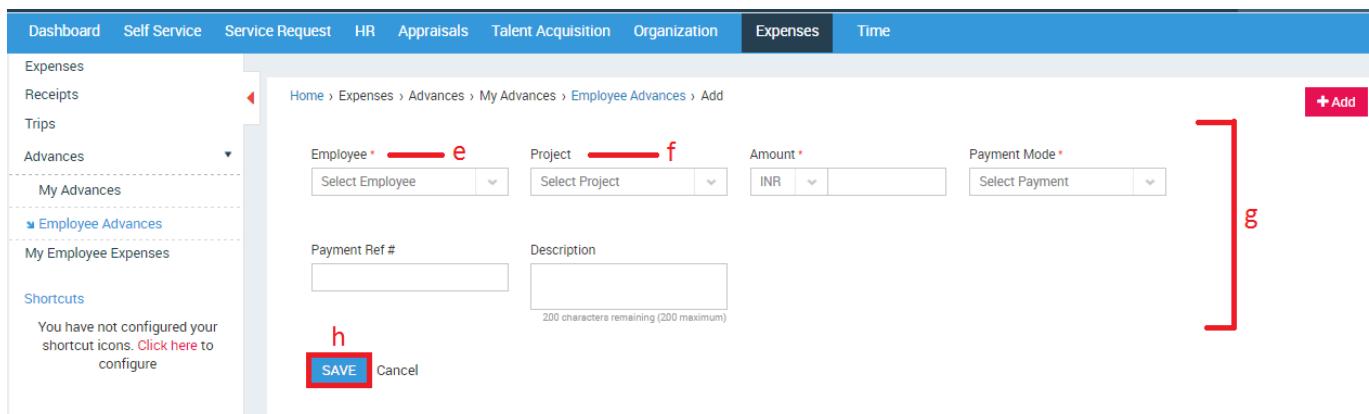
Action	Employee	Amount	Utilized
	Arun JJ	2000.00	partial

Below the table are search and filter controls ('Records per page: 20') and a red '+' Add button.

Figure 189

- Click **Expenses** in the top menu
- Click **Advances** on the left menu panel
- Click **Employee Advances** in the submenu
- Click **+Add** Button

Please refer Figure 190



The screenshot shows the 'Employee Advances' add form. The top navigation bar and sidebar are identical to Figure 189. The main form fields are: Employee \* (dropdown labeled e), Project (dropdown labeled f), Amount \* (dropdown labeled g), Payment Mode \* (dropdown), Payment Ref # (text input), Description (text input with placeholder '200 characters remaining (200 maximum)'), and a red 'SAVE' button (labeled h). A red bracket on the right side groups the dropdowns for Employee, Project, and Amount.

Figure 190

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

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

Please refer Figure 191

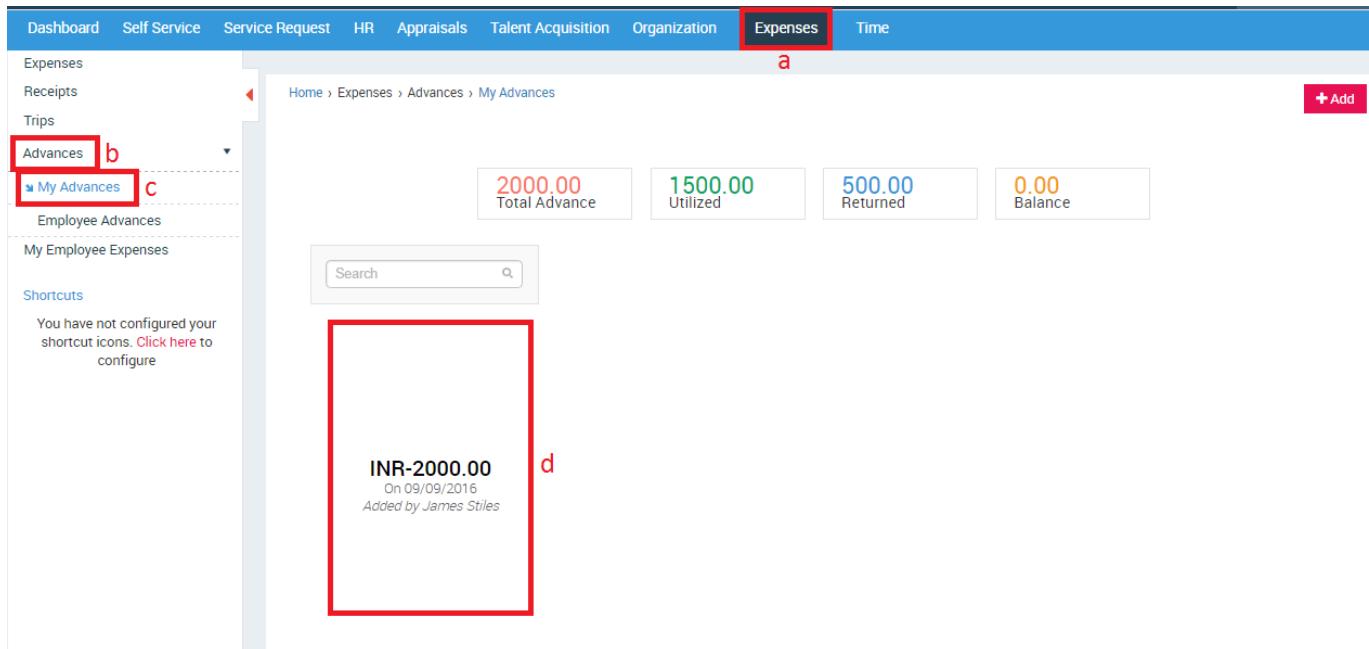


Figure 191

- Click **Expenses** in the top menu
- Click **Advances** on the left panel
- Click **My Advances** in the submenu
- You can view the advance amount and the person's name who has allotted you the advance

Please refer Figure 192

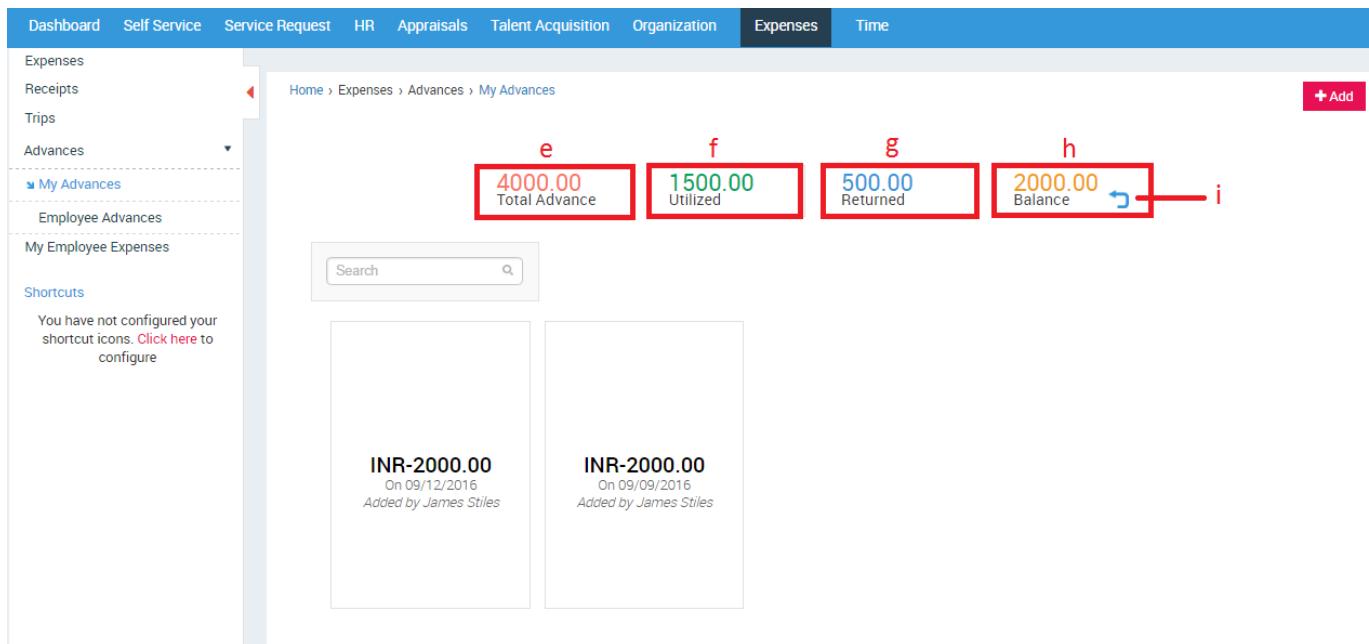


Figure 192

- 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 <span style="border: 1px solid #ccc; padding: 2px 5px;"> </span>	Select Payment <span style="border: 1px solid #ccc; padding: 2px 5px;"> </span>	<input type="text"/>
Return To *	Description <input type="text"/> <small>200 characters remaining (200 maximum)</small>	
<a href="#" style="border: 1px solid #0070C0; padding: 2px 10px; color: inherit; text-decoration: none;">SAVE</a>	<a href="#" style="color: inherit; text-decoration: none;">Cancel</a>	

Figure 193

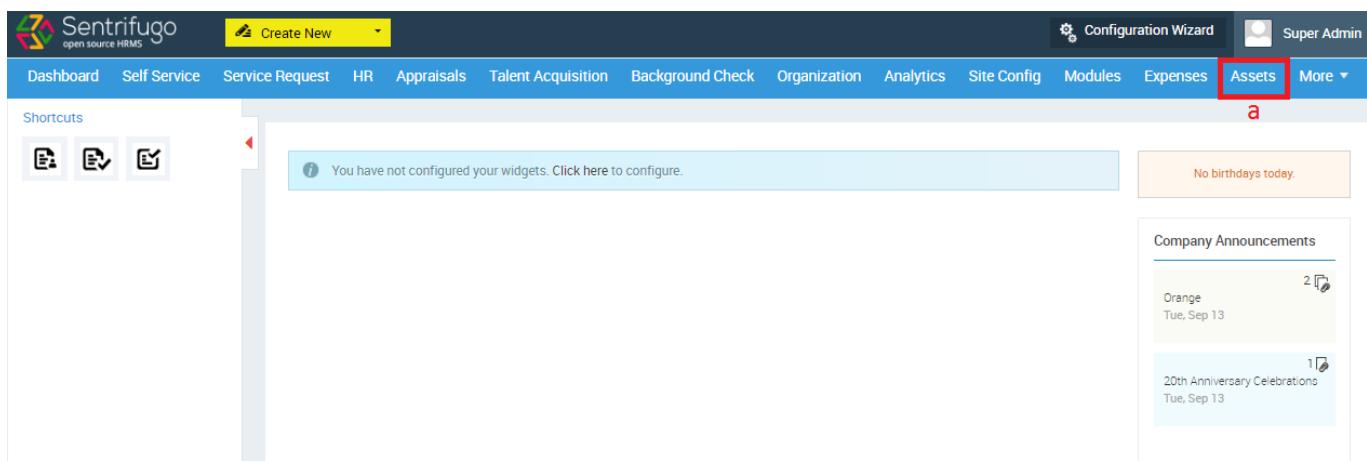
- j. Enter the required details
- k. Click **SAVE** button

## 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.

### 15.1 How do I create an Asset Category?

Please refer Figure 194

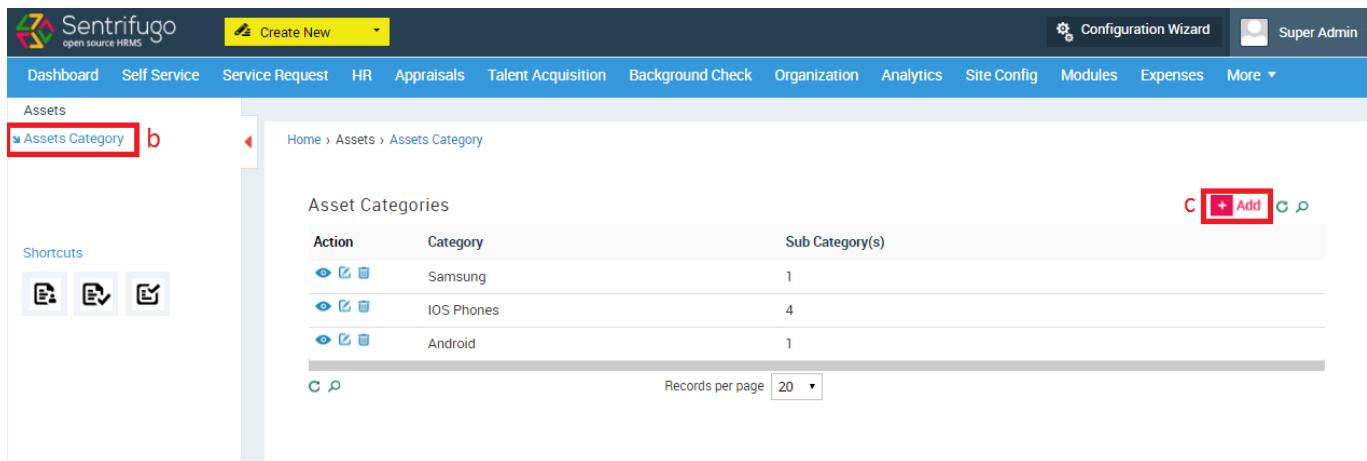


The screenshot shows the Sentrifugo dashboard. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and Assets. The 'Assets' link is highlighted with a red box and labeled 'a'. To the right of the navigation bar are 'Configuration Wizard' and 'Super Admin' buttons. Below the navigation bar, there is a 'Shortcuts' section with three icons. In the center, there is a message box stating 'You have not configured your widgets. Click here to configure.' To the right, there is a 'Company Announcements' section with two items: 'Orange' (Tue, Sep 13) and '20th Anniversary Celebrations' (Tue, Sep 13). There is also a note 'No birthdays today.'

Figure 194

- Click **Assets** in the top menu

Please refer Figure 195

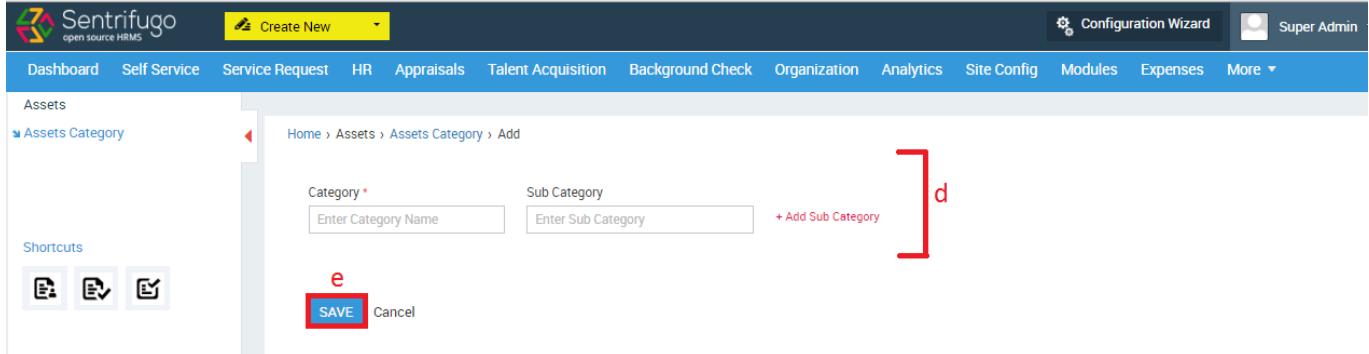


The screenshot shows the 'Assets Category' page. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. The 'Assets' link is highlighted with a red box and labeled 'b'. Below the navigation bar, there is a 'Shortcuts' section with three icons. In the center, there is a breadcrumb trail 'Home > Assets > Assets Category'. On the right, there is a table titled 'Asset Categories' with columns for Action, Category, and Sub Category(s). The table contains three rows: 'Samsung' (1 sub category), 'IOS Phones' (4 sub categories), and 'Android' (1 sub category). At the bottom right of the table, there is a red box around the '+ Add' button and a label 'c'. There are also search and filter icons at the bottom left of the table.

Figure 195

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

Please refer Figure 196



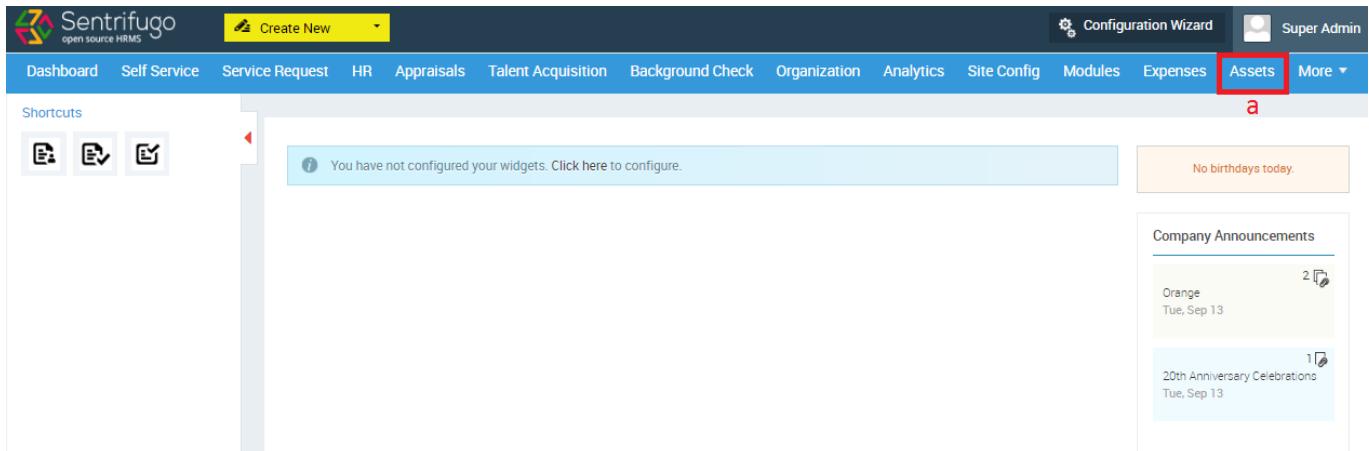
The screenshot shows the 'Assets Category' creation page. At the top, there are navigation links: Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. On the left, a sidebar has 'Assets' selected, and under it, 'Assets Category' is shown with a 'Create New' button. The main form has fields for 'Category \*' (with placeholder 'Enter Category Name') and 'Sub Category' (with placeholder 'Enter Sub Category'). Below these is a link '+ Add Sub Category'. At the bottom right of the form area is a red box containing the blue 'SAVE' button. To the left of the form, there's a 'Shortcuts' section with three icons. The entire form area is enclosed in a red bracket labeled 'd'.

Figure 196

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

## 15.2 How do I add an Asset?

Please refer Figure 197

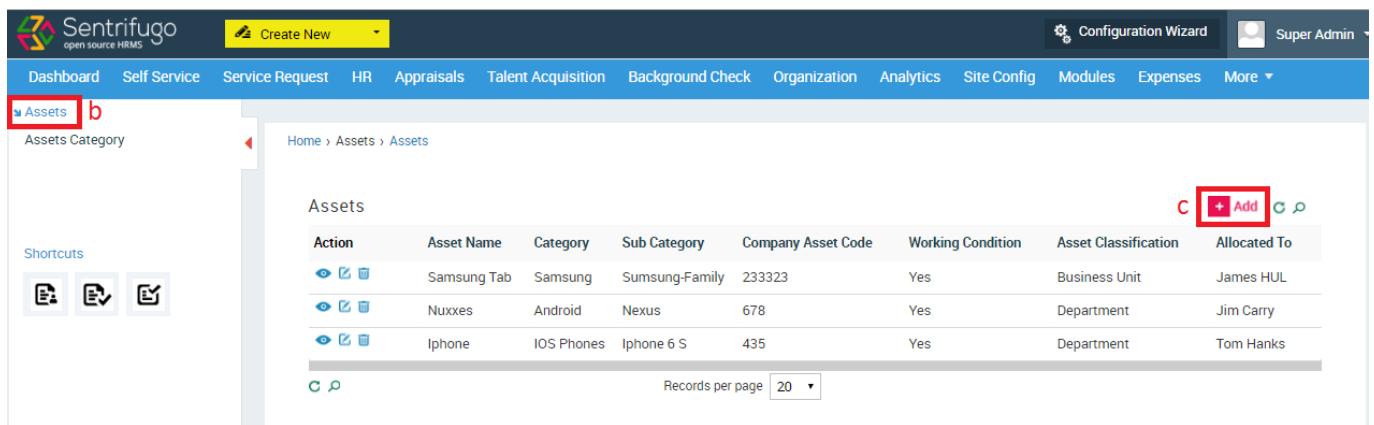


The screenshot shows the Sentrifugo dashboard. At the top, there are navigation links: Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, Modules, Expenses, **Assets** (which is highlighted with a red box), and More. Below the navigation is a 'Shortcuts' section with three icons. To the right, there are several widgets: a message about unconfigured widgets, a birthday reminder, company announcements (listing 'Orange' and '20th Anniversary Celebrations'), and other notifications.

Figure 197

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

Please refer Figure 198

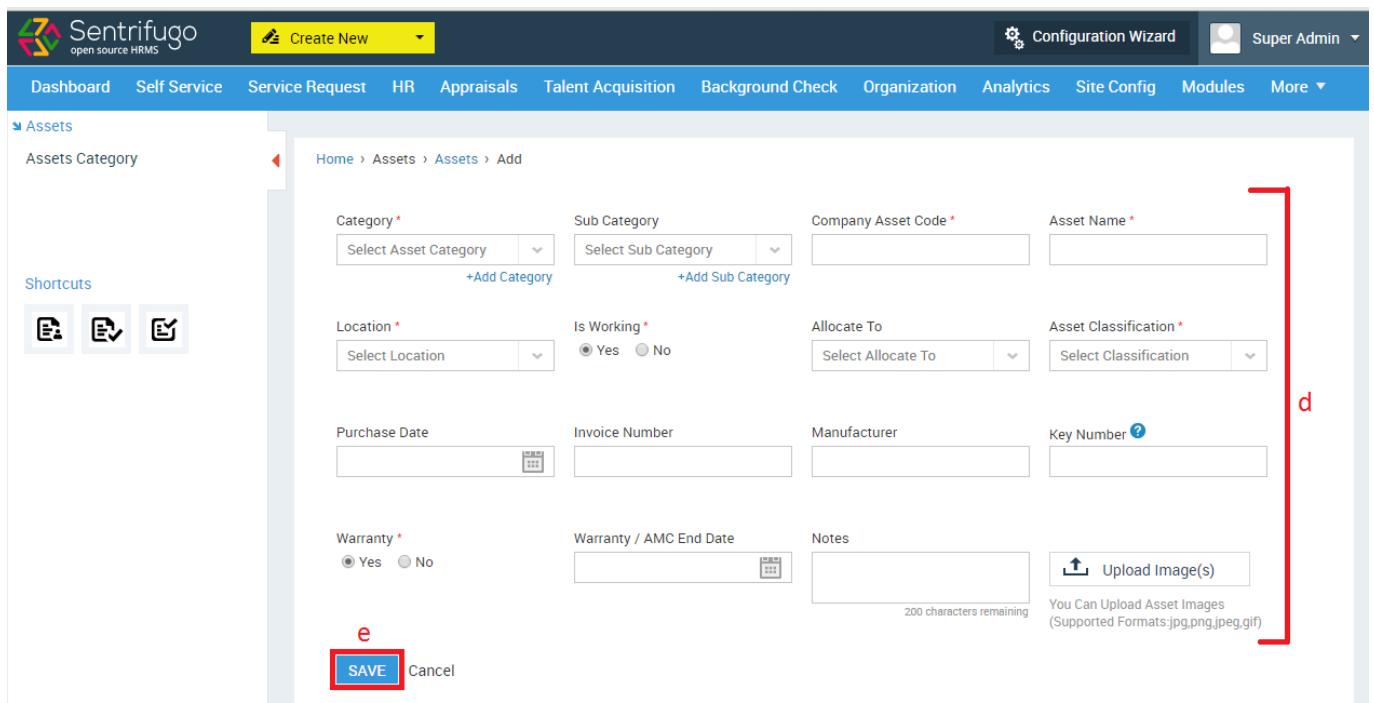


Action	Asset Name	Category	Sub Category	Company Asset Code	Working Condition	Asset Classification	Allocated To
	Samsung Tab	Samsung	Sumsung-Family	233323	Yes	Business Unit	James HUL
	Nuxxes	Android	Nexus	678	Yes	Department	Jim Carry
	Iphone	IOS Phones	Iphone 6 S	435	Yes	Department	Tom Hanks

Figure 198

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

Please refer Figure 199



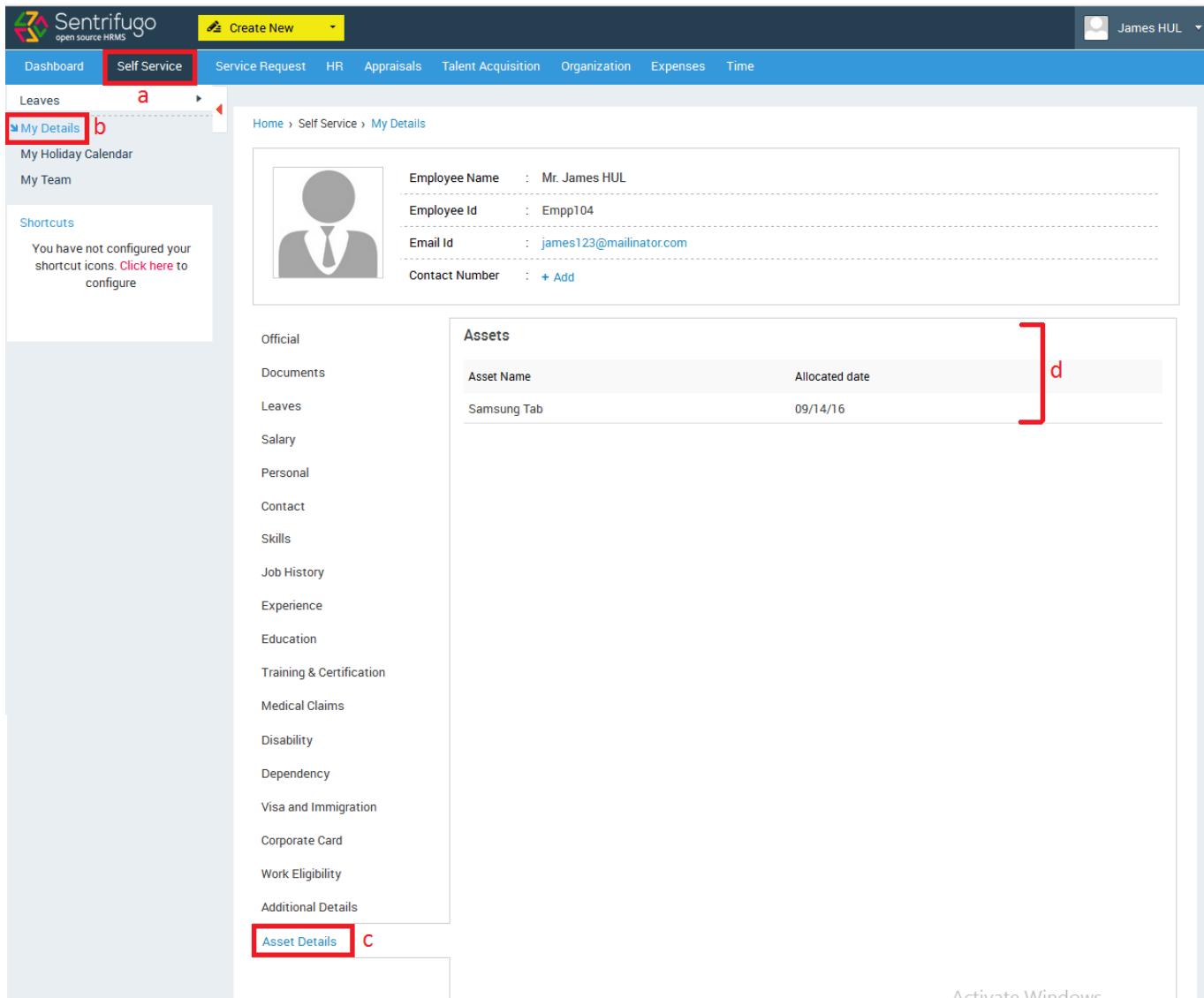
The screenshot shows the 'Assets' add form. It includes fields for Category, Sub Category, Company Asset Code, Asset Name, Location, Is Working (radio buttons for Yes/No), Allocate To, Asset Classification, Purchase Date, Invoice Number, Manufacturer, Key Number, Warranty (radio buttons for Yes/No), Warranty / AMC End Date, Notes, and an Upload Images section. The 'Category' and 'Key Number' fields are highlighted by a red bracket labeled 'd'. The 'SAVE' button at the bottom left is highlighted with a red box labeled '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. The top navigation bar includes 'Create New' (dropdown), 'James HUL' (profile), 'Dashboard', 'Self Service' (highlighted with a red box and labeled 'a'), 'Service Request', 'HR', 'Appraisals', 'Talent Acquisition', 'Organization', 'Expenses', and 'Time'. The left sidebar has 'Leaves' (labeled 'a') and 'My Details' (highlighted with a red box and labeled 'b'). Under 'Shortcuts', it says 'You have not configured your shortcut icons. Click here to configure'. A list of options includes: 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 main content area shows 'My Details' with a profile picture and employee information: Employee Name : Mr. James HUL, Employee Id : Empp104, Email Id : james123@mailinator.com, and Contact Number : + Add. Below this is a section titled 'Assets' with a table:

Asset Name	Allocated date
Samsung Tab	09/14/16

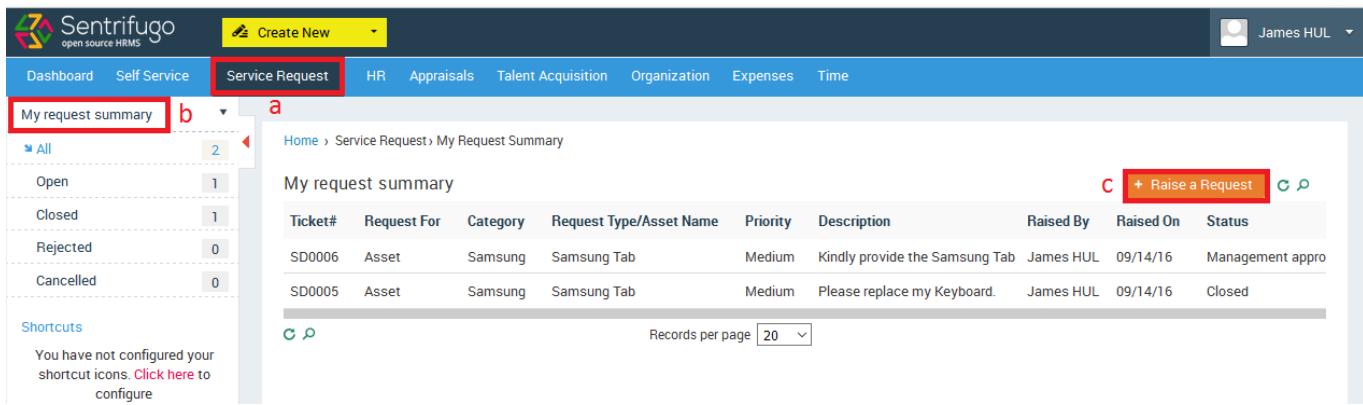
A red bracket labeled 'd' points to the 'Assets' section. A red box highlights 'Asset Details' in the sidebar, labeled 'c'.

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



**a** Home > Service Request > My Request Summary

**b** My request summary

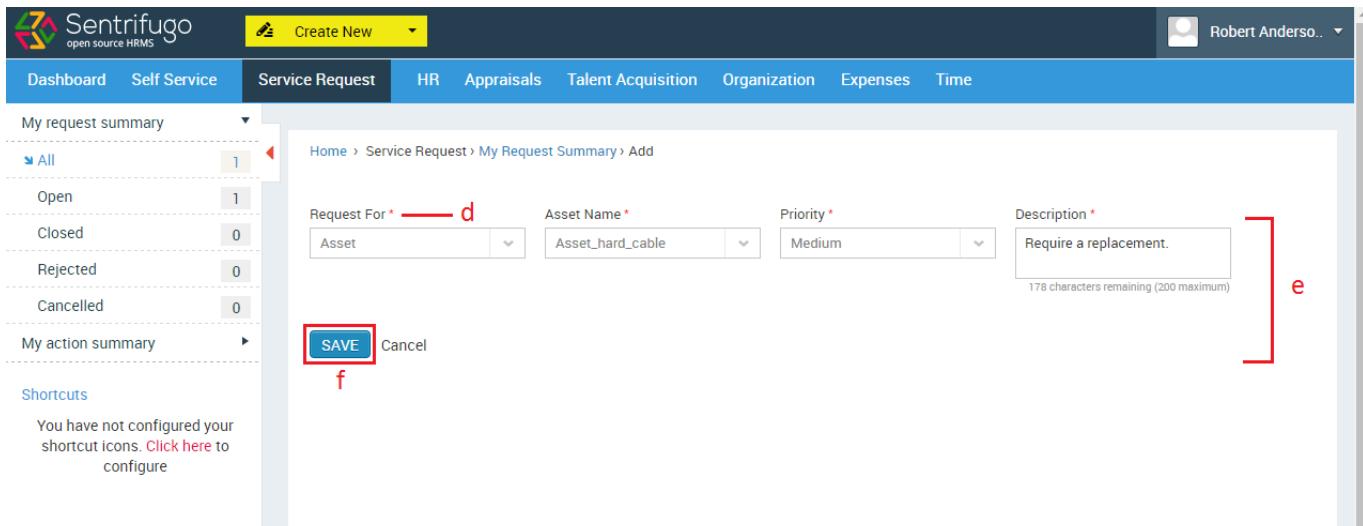
**c** + Raise a Request

Ticket#	Request For	Category	Request Type/Asset Name	Priority	Description	Raised By	Raised On	Status
SD0006	Asset	Samsung	Samsung Tab	Medium	Kindly provide the Samsung Tab	James HUL	09/14/16	Management appro
SD0005	Asset	Samsung	Samsung Tab	Medium	Please replace my Keyboard.	James HUL	09/14/16	Closed

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



**d** Request For \*

**e** Description \*

**f** SAVE Cancel

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:

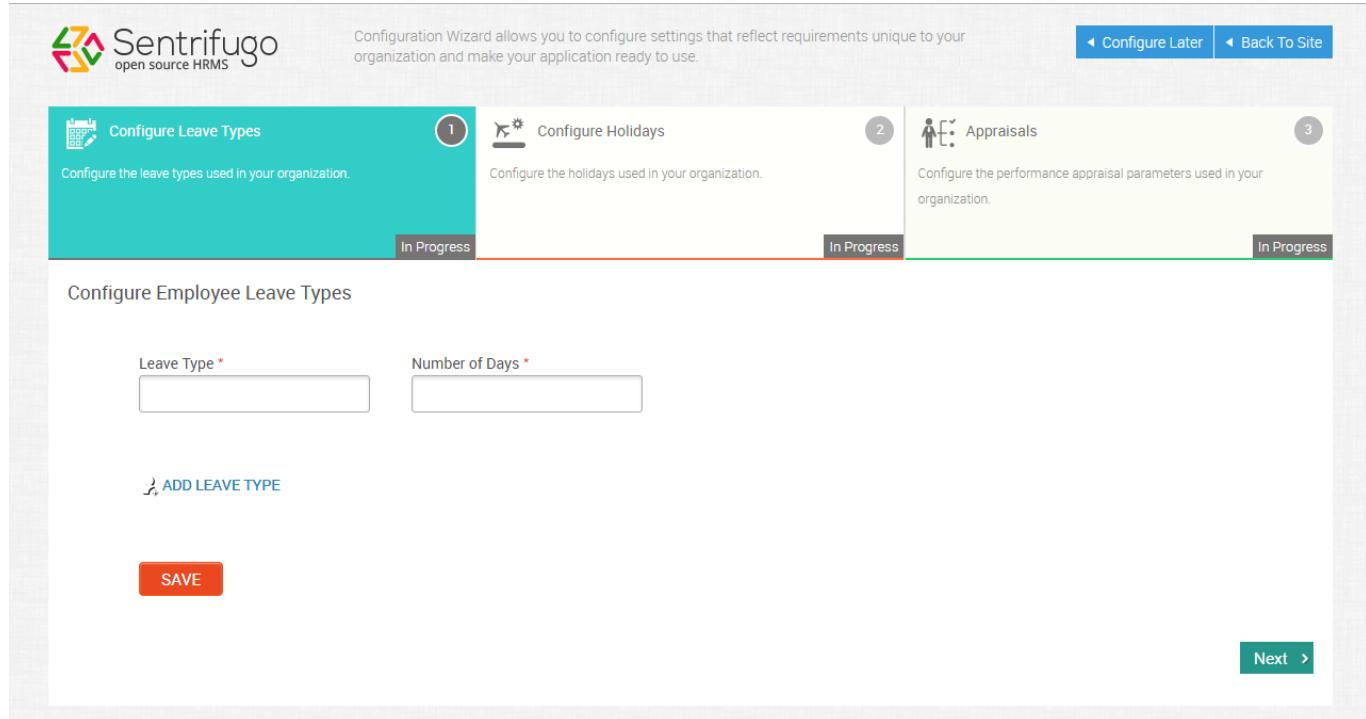
**Service Request > Configuration > Settings > +Add**

# 16. Additional Features

## 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 Leave Types** (Step 1, In Progress)

Configure the leave types used in your organization.

**Configure Holidays** (Step 2, In Progress)

Configure the holidays used in your organization.

**Appraisals** (Step 3, In Progress)

Configure the performance appraisal parameters used in your organization.

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.

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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

Configure the leave types used in your organization.

Completed

 Configure Holidays

Configure the holidays used in your organization.

In Progress

 Appraisals

Configure the performance appraisal parameters used in your organization.

In Progress

**Configure Holidays**

Holiday Group \*

| ▾

[Add Holiday Group](#)

Holiday \*

Date ? \*

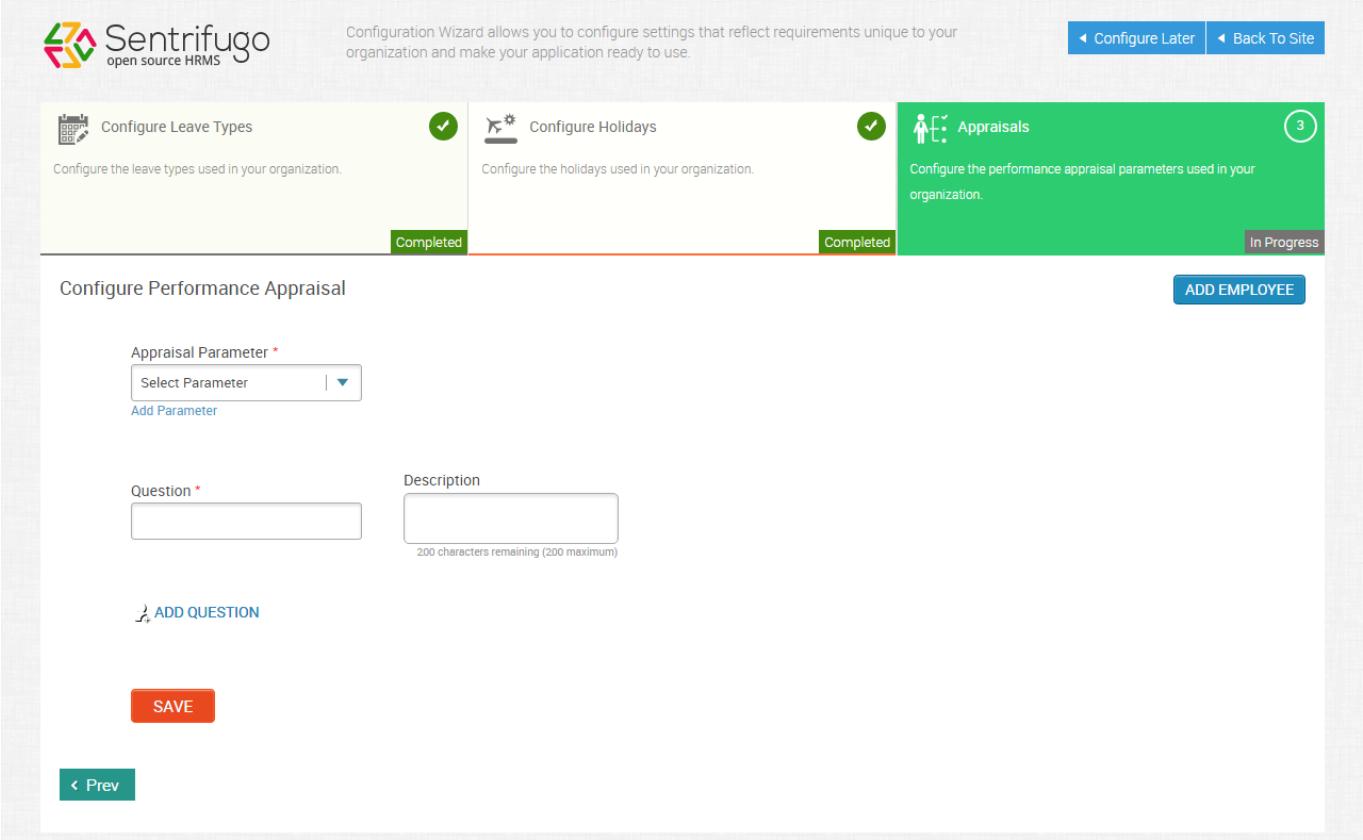
[ADD HOLIDAY](#)

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 Holidays      Completed

Appraisals      In Progress

Configure Performance Appraisal

Appraisal Parameter \*

Select Parameter | ▾

Add Parameter

Question \*

Description

200 characters remaining (200 maximum)

[ADD QUESTION](#)

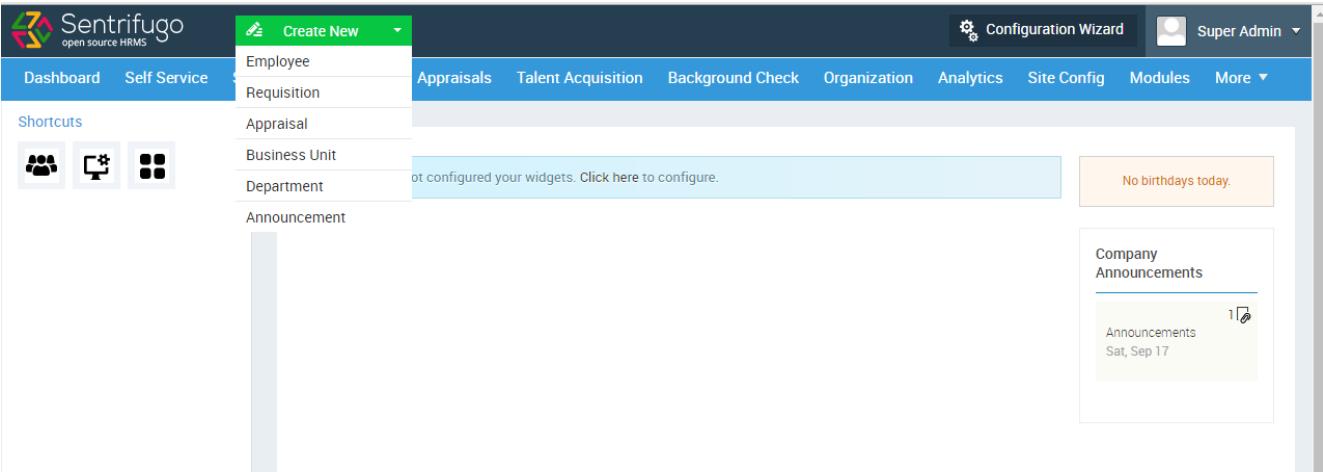
[SAVE](#)

[◀ 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.



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[Create New](#) ▾

- Employee
- Requisition
- Appraisal
- Business Unit
- Department
- Announcement

Not configured your widgets. Click here to configure.

No birthdays today.

Company Announcements

Announcements Sat, Sep 17