



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.



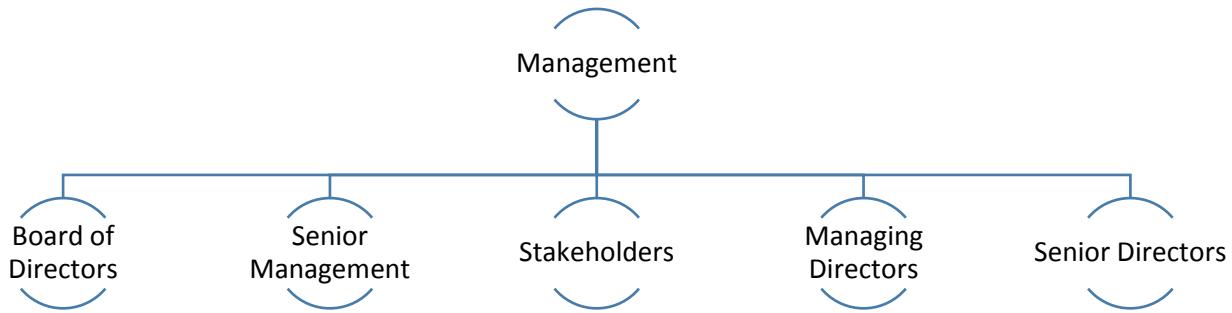
Since the Super Admin will not be included in the employee's list, he/she will not be able to perform employee actions like raising a leave request, service request, submitting timesheets etc. You can add another employee to Sentrifugo for the Super Admin user, with his/her actual details like Name,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

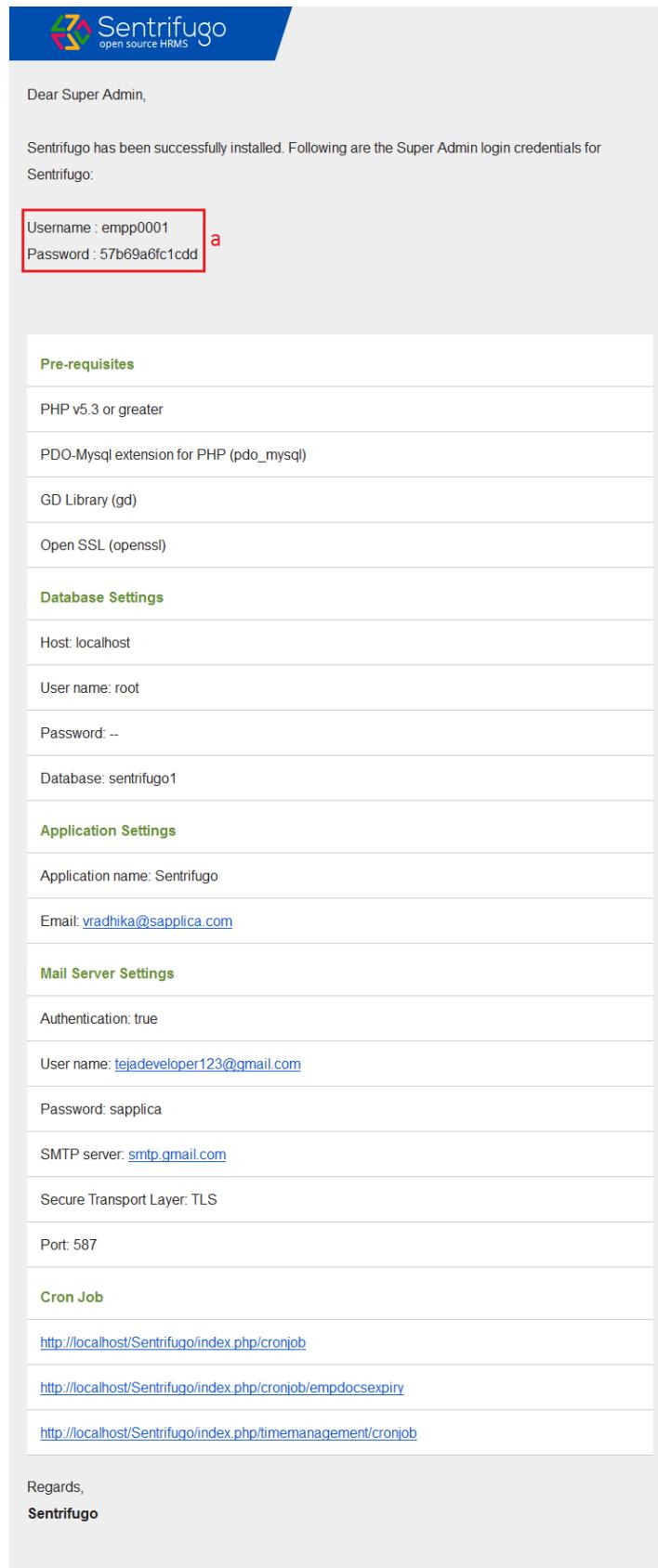


Figure 2

1.2.2 Employees/Users

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

Please refer Figure 3.

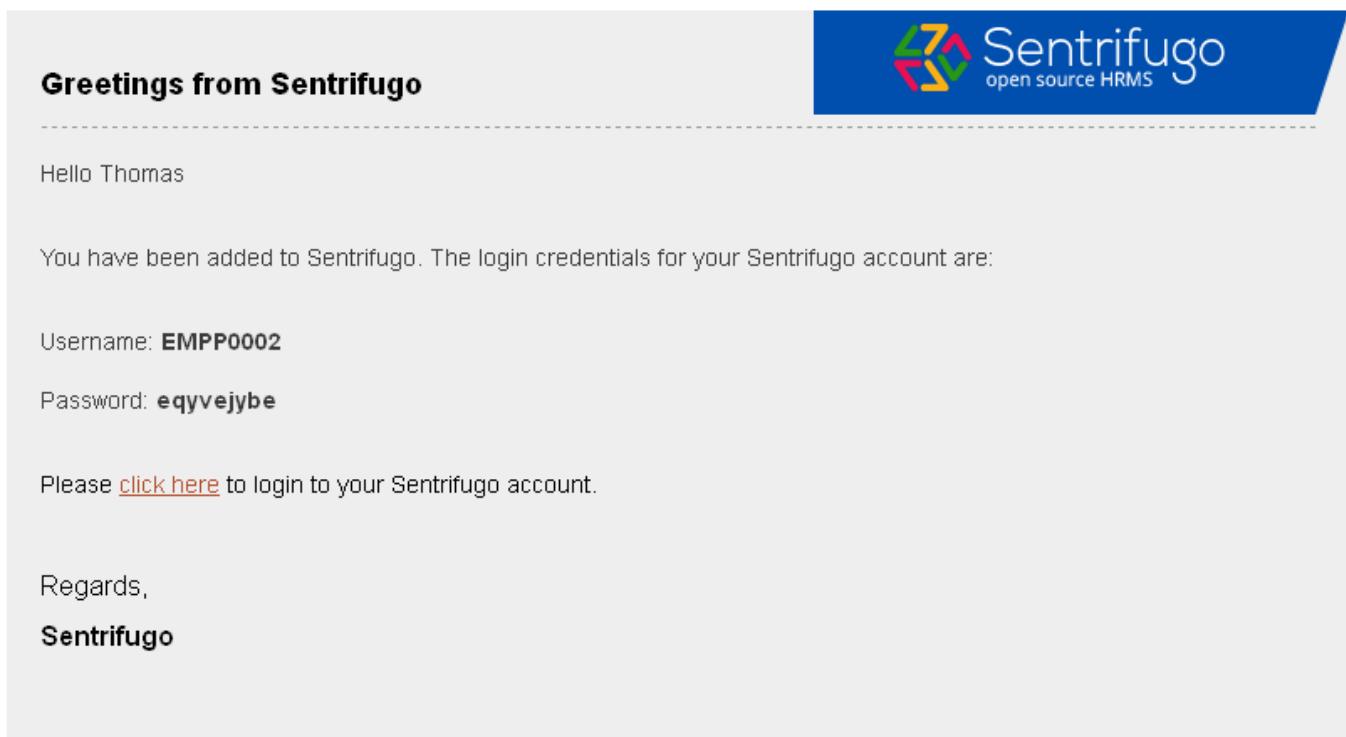
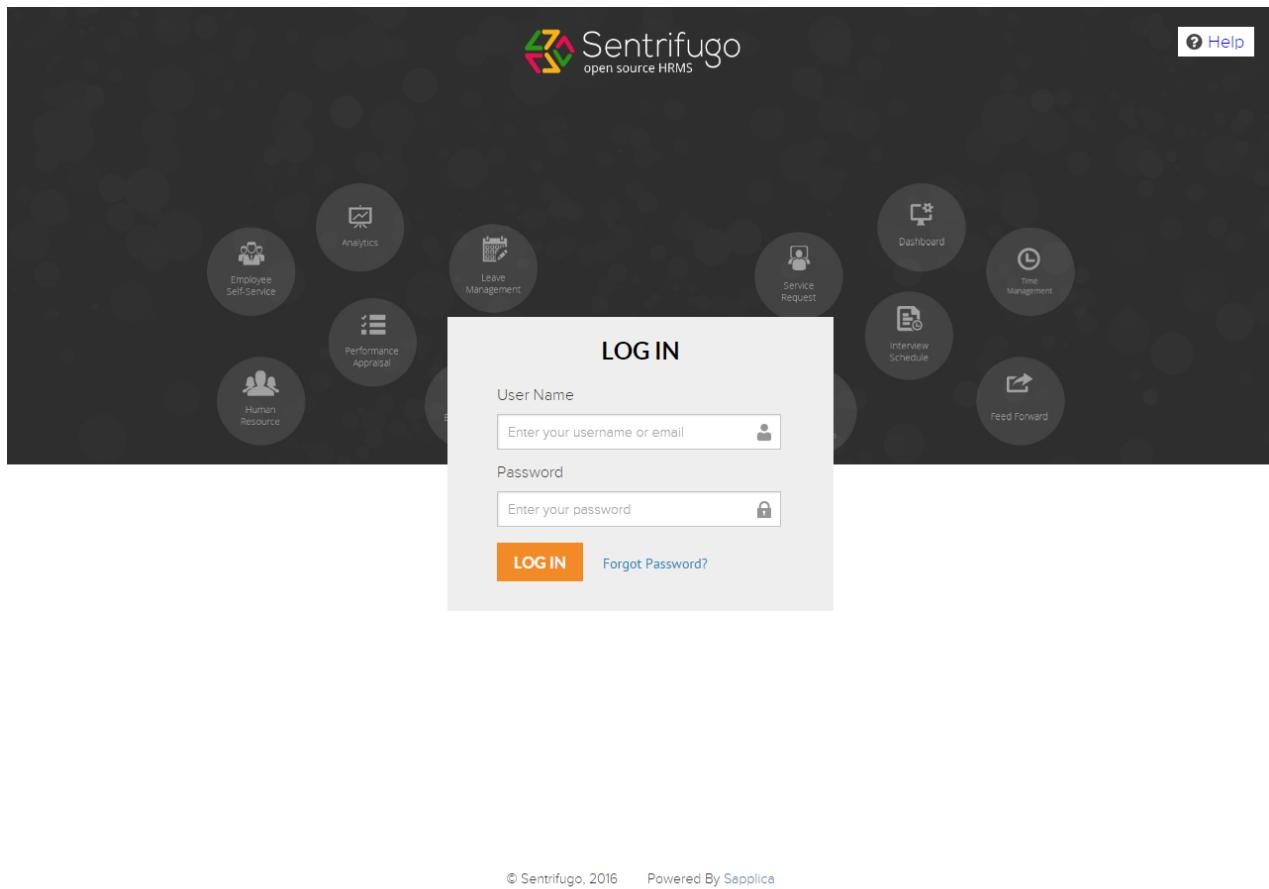


Figure 3

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



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

1.3 How do I set up Sentrifugo?

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

1.3.1 Configuration Wizard

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

Information is gathered in 5 steps.

Step 1: Modules

Please refer Figure 4.

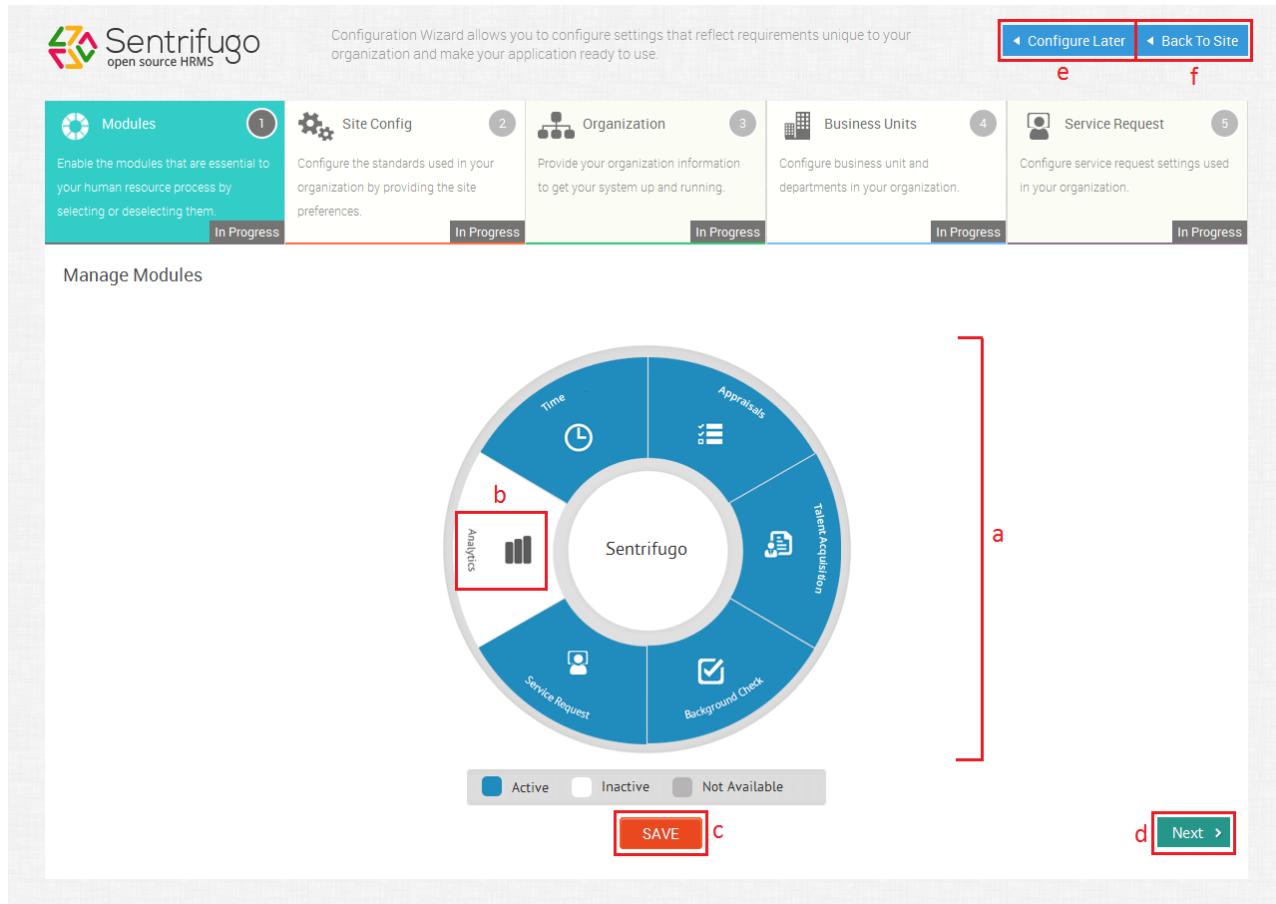


Figure 4

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

Step 2: Site Config

Please refer Figure 5.

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

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

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

Site Configuration

Employee Code ? *

Currency ? *

Date Format ? *

Time Format ? *

Default Time Zone ? *

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

Country ? *

State ? *

City ? *

Default Password ? *

Employment Status ? *

SAVE

[◀ Prev](#)

[Next ▶](#)

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

Configure Organization Information

Organization ? *	Website ? *	Organization Started On ?	Total Employees ? *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> 20-50
Primary Phone Number ?	Secondary Phone Number ?	Fax Number ?	Country ? *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> United States Add Country
State ? *	City ? *	Main Branch Address ?	Address 1 ?
<input type="text"/> Georgia Add State	<input type="text"/> Atlanta Add City	<input type="text"/>	<input type="text"/>
Address 2 ?	Organization Description ?		
<input type="text"/>	<input type="text"/>		
Upload Organization Logo ?	Business Domain ?		
 Upload Logo	<input type="text"/>		

SAVE

[◀ Prev](#) [Next ▶](#)

Figure 6

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

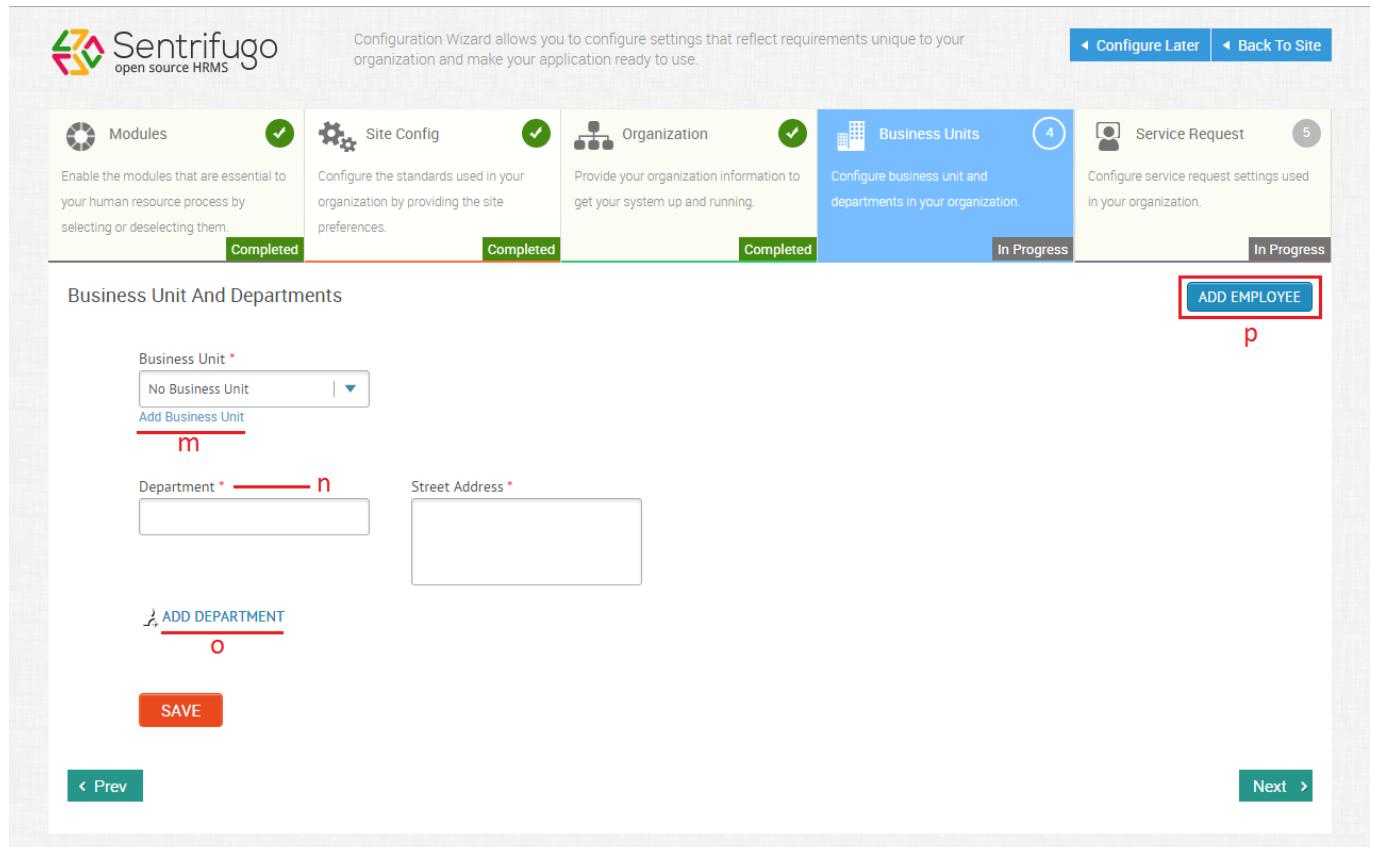
After saving your organization's details, an **ADD Employee** button will appear on the top right corner of the configuration wizard screen. However, it is not mandatory to add an employee in this step, you can even add an employee after the entire configuration is completed.

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

Step 4: Business Units

You can create business units and departments here.

Please refer Figure 7.



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

Business Unit And Departments

Business Unit *

No Business Unit | ▾

Add Business Unit
m

Department * ————— n

Street Address *

ADD DEPARTMENT o

SAVE

◀ Configure Later | ▶ Back To Site

Modules: Completed

Site Config: Completed

Organization: Completed

Business Units: In Progress (Step 4)

Service Request: In Progress (Step 5)

ADD EMPLOYEE p

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

Service Request Categories And Requests

[ADD EMPLOYEE](#)

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

Request Type * r

Description
200 characters remaining (200 maximum)

[ADD REQUEST TYPE](#)

q r s

SAVE

[◀ Prev](#)

Figure 8

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

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



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

1.4 How do I add Employees to Sentrifugo?

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



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



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

1.4.1 Adding Organization Head (Employee #2)

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

Please refer Figure 9.

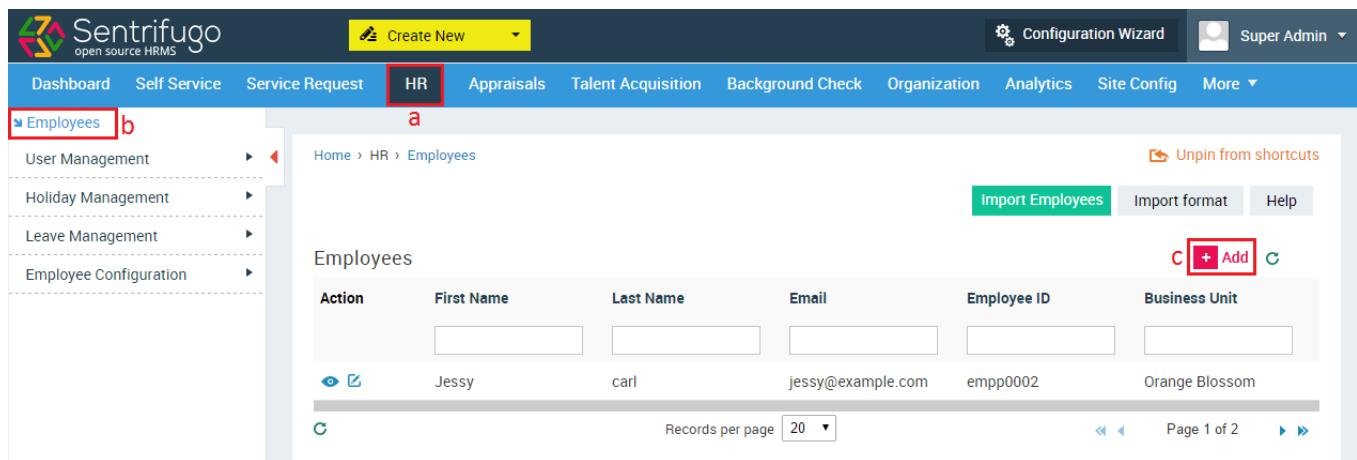
The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (which is highlighted in yellow), Appraisals, Talent Acquisition, Background Check, Organization, Site Config, Modules, Time, and Logs. The Configuration Wizard is active, indicated by a red box around the 'Configuration Wizard' button in the top right. The main content area is titled 'MANAGEMENT DETAILS' and contains fields for Employee ID (EMPP0002), First Name, Last Name, Prefix, Role, Email, Job Title, Position, Date of Joining, and Management Description. Validation messages are displayed for the Job Title and Position fields. Buttons for 'SAVE' and 'Cancel' are at the bottom left. A sidebar on the left lists 'Employees' under 'User Management' and 'Employee Configuration'. A 'SHORTCUTS' section notes that no shortcut icons are configured. A red bracket labeled 'a' points to the 'Job Title' and 'Position' fields, which have validation messages: 'Job titles are not configured yet.' and 'Positions are not configured yet.' respectively. A red bracket labeled 'b' points to the 'Management Description' field. A red bracket labeled 'c' points to the 'Date of Joining' field.

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 Create New, Configuration Wizard, Super Admin, and various system modules like Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. The HR link is highlighted with a red box. Below the navigation bar is a left sidebar with a tree view of the application structure. Under the 'Employees' node, which is also highlighted with a red box, there are options for User Management, Holiday Management, Leave Management, and Employee Configuration. The main content area is titled 'Employees' and displays a table with columns for Action, First Name, Last Name, Email, Employee ID, and Business Unit. A single row is shown for 'Jessy' with values: carl, jessy@example.com, empp0002, and Orange Blossom. At the bottom of the table, there are buttons for Import Employees, Import format, and Help, along with a 'Unpin from shortcuts' link. On the right side of the table, there is a 'C' icon, a '+Add' button (highlighted with a red box), and a 'G' icon. Navigation controls for records per page (set to 20) and page number (Page 1 of 2) are also present.

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

Official Documents Leaves Holidays Salary Personal Contact Skills Job History Experience Education Training & Certification Medical Claims Disability Dependency Visa and Immigration Corporate Card Work Eligibility Additional Details	Employee Code * <input type="text" value="empp"/> Configure Identity Codes	Employee Id * <input type="text"/> d	Prefix <input type="text"/> Select Prefix
	First Name * <input type="text"/>	Last Name * <input type="text"/>	Mode of Employment * <input type="text" value="Direct"/>
	Role * <input type="text"/>	Email * <input type="text"/>	Business Unit <input type="text" value="No Business Unit"/>
	Department <small>?</small> * <input type="text"/>	Reporting Manager * <input type="text"/>	Job Title <input type="text"/>
	Select Department	Select Reporting Manager	Select Job Title
	Add Position	Add Employment Status	Add Job Title
	Position <small>?</small> <input type="text"/>	Employment Status * <input type="text"/>	Date of Joining <small>?</small> * <input type="text"/>
	Select Position	Select Employment Status	Select Date of Joining
	Date of Leaving <small>?</small> <input type="text"/>	Years of Experience <input type="text"/>	Work Telephone Number <input type="text"/>
	Extension <input type="text"/>	Fax <input type="text"/>	
	e	f	
	<input type="button" value="Save"/> <input type="button" value="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.

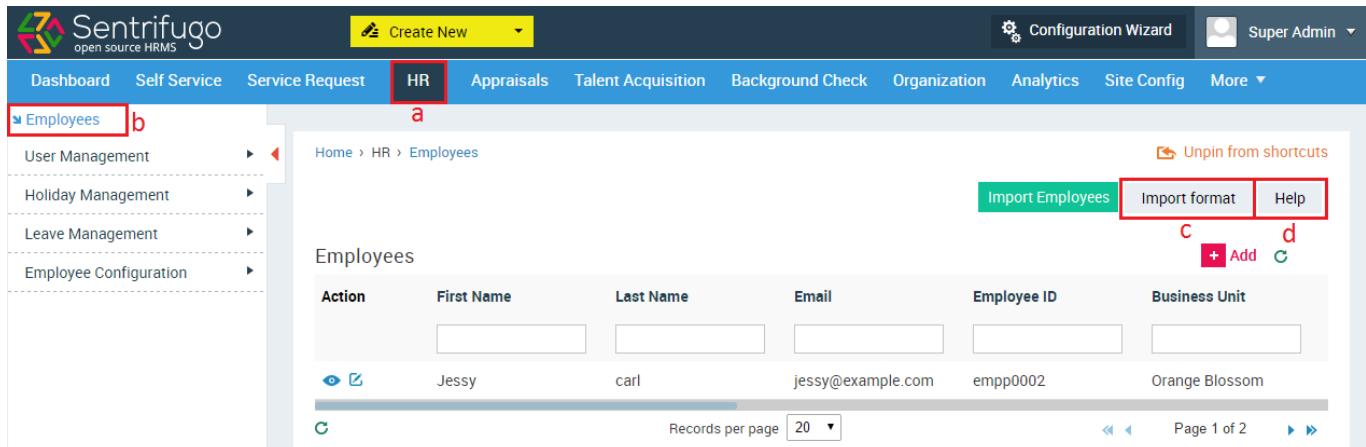
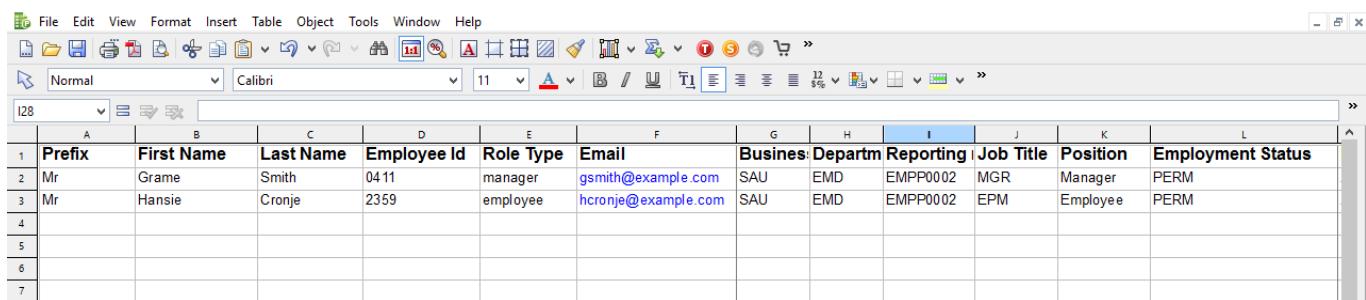


Figure 12

- 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	Business	Departm	Reporting	Job Title	Position	Employment Status
2	Mr	Grame	Smith	0411	manager	gsmith@example.com	SAU	EMD	EMPP0002	MGR	Manager	PERM
3	Mr	Hansie	Cronje	2359	employee	hcronje@example.com	SAU	EMD	EMPP0002	EPM	Employee	PERM
4												
5												
6												
7												

Figure 13

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

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

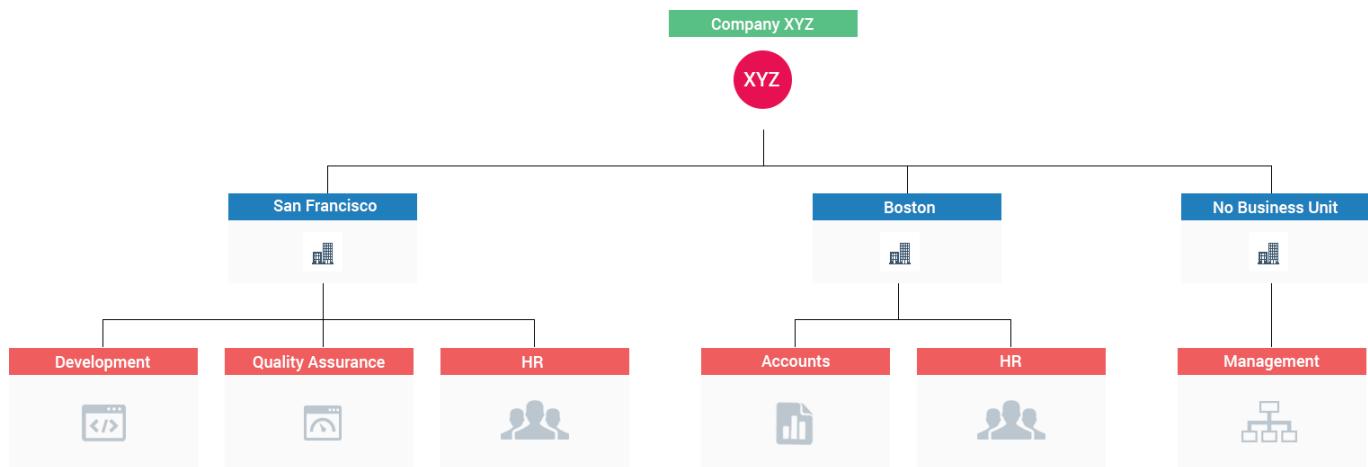
For example: <http://example.com/sentrifugo/index.php/cronjob>



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

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

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



1.5.1 Adding Business Units

Please refer Figure 14.

The screenshot shows the Sentrifugo web interface. The top navigation bar includes 'Create New', 'Configuration Wizard', 'Super Admin', and a 'More' dropdown. The main menu has items like '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, a sidebar has 'Organization Info' with 'Business Units' (highlighted with a red box) and 'Departments', 'Organization Structure', 'Organization Hierarchy', 'Announcements', and 'Policy Documents'. The main content area shows 'Business Units' with a table:

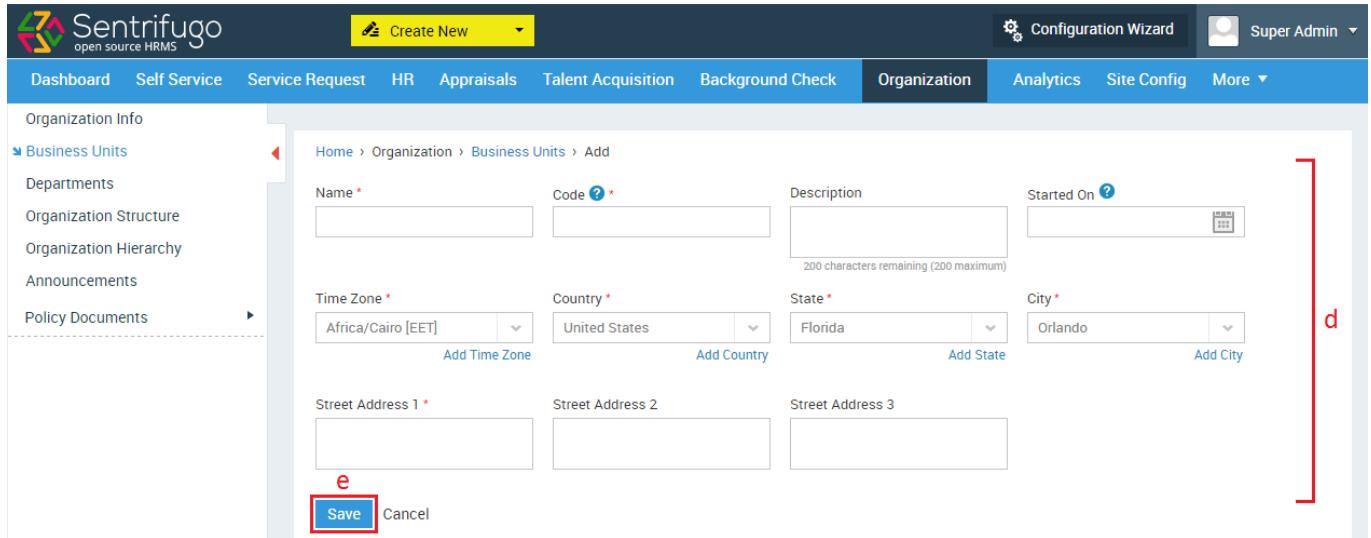
Action	Name	Code	Started On	Street Address	City	State	Country	Time zone
	Orange Blossom	ORB	2011-Aug-16	Bakes man street	Atlanta	Georgia	United States	Africa/Cairo [EET]
	Avenue	AVE	2014-Aug-13	Brooklyn street	Orlando	Florida	United States	Africa/Accra [GMT]

At the bottom right of the content area, there is a '+ Add' button with a red box around it.

Figure 14

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

Please refer Figure 15.



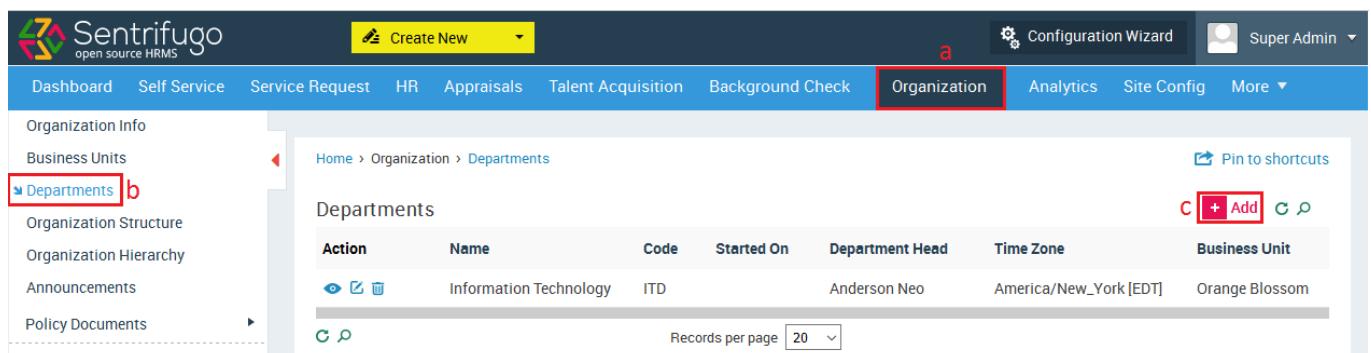
The screenshot shows the Sentrifugo HRMS interface for creating a new Business Unit. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The 'Organization' tab is active. The left sidebar lists various organization-related modules. The main content area is titled 'Business Units > Add'. It contains fields for Name, Code, Description, Started On, Time Zone (set to Africa/Cairo [EET]), Country (United States), State (Florida), City (Orlando), Street Address 1, Street Address 2, and Street Address 3. A red bracket labeled 'd' points to the 'City' field. A red box labeled 'e' points to the 'Save' button at the bottom.

Figure 15

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

1.5.2 Adding Departments

Please refer Figure 16.

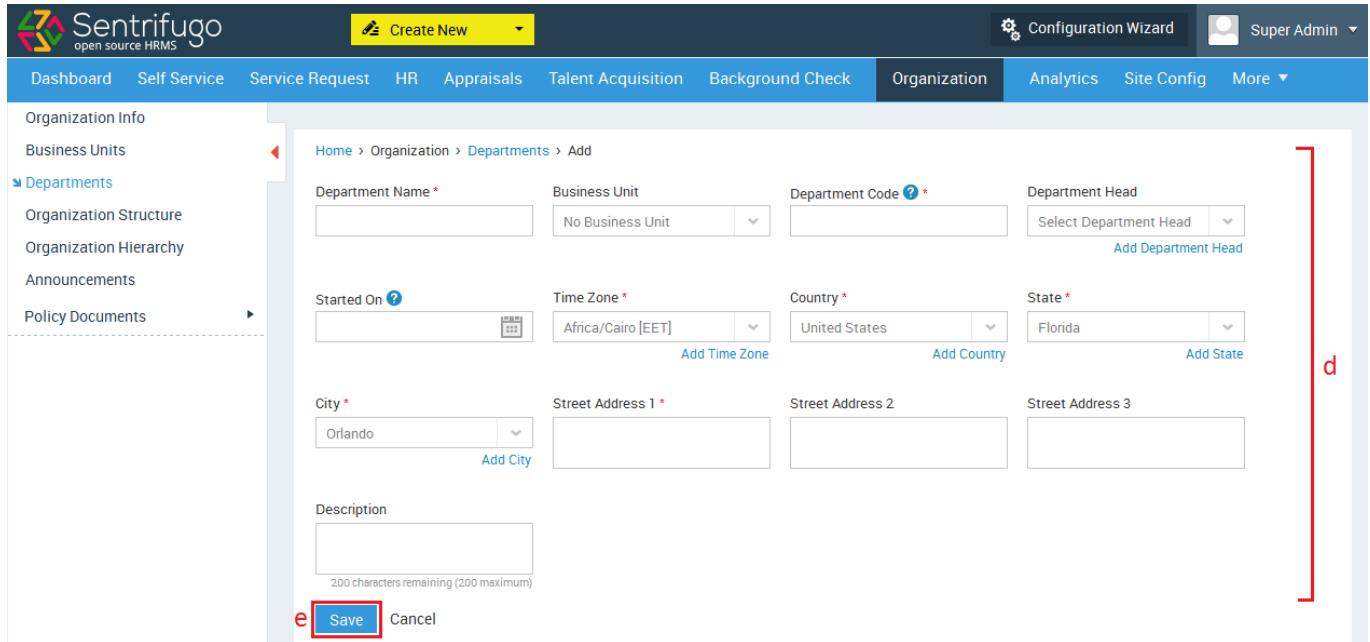


The screenshot shows the Sentrifugo HRMS interface for managing departments. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The 'Organization' tab is active. The left sidebar lists various organization-related modules, with 'Departments' selected. The main content area is titled 'Departments'. It shows a table with columns: Action, Name, Code, Started On, Department Head, Time Zone, and Business Unit. One row is visible: Information Technology, ITD, Anderson Neo, America/New_York [EDT], and Orange Blossom. A red box labeled 'a' is over the 'Organization' tab. A red box labeled 'b' is over the 'Departments' link in the sidebar. A red box labeled 'c' is over the '+Add' button in the top right.

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 lists 'Organization Info', 'Business Units', and 'Departments' (which is expanded). Under 'Departments', there are links for 'Organization Structure', 'Organization Hierarchy', 'Announcements', and 'Policy Documents'. The main content area shows a form for adding a new department. The fields include:

- Department Name ***: An input field.
- Business Unit**: A dropdown menu showing 'No Business Unit'.
- Department Code ? ***: An input field.
- Department Head**: A dropdown menu with 'Select Department Head' and an 'Add Department Head' link. A red bracket labeled 'd' points to this section.
- Started On ?**: A date picker.
- Time Zone ***: A dropdown menu showing 'Africa/Cairo [EET]'. Below it is an 'Add Time Zone' link.
- Country ***: A dropdown menu showing 'United States'. Below it is an 'Add Country' link.
- State ***: A dropdown menu showing 'Florida'. Below it is an 'Add State' link.
- City ***: A dropdown menu showing 'Orlando'. Below it is an 'Add City' link.
- Street Address 1 ***: An input field.
- Street Address 2**: An input field.
- Street Address 3**: An input field.
- Description**: A text area with a character limit of 200.

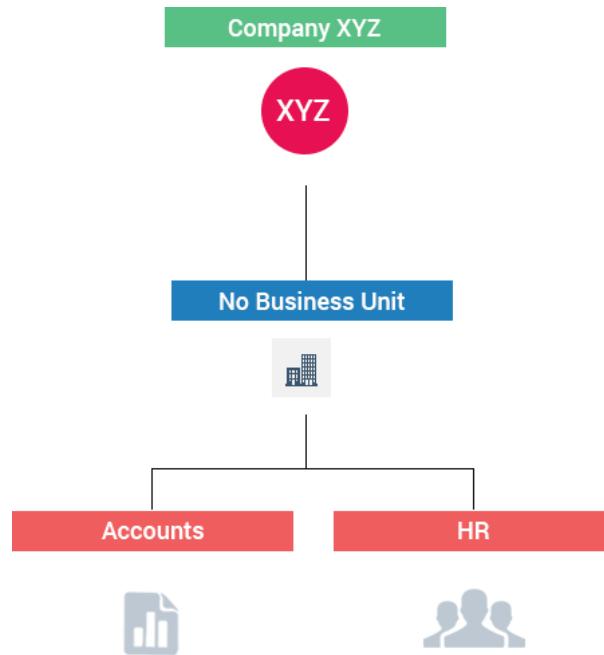
At the bottom are two buttons: a red-bordered **Save** button and a **Cancel** button. A red box labeled 'e' covers the **Save** button.

Figure 17

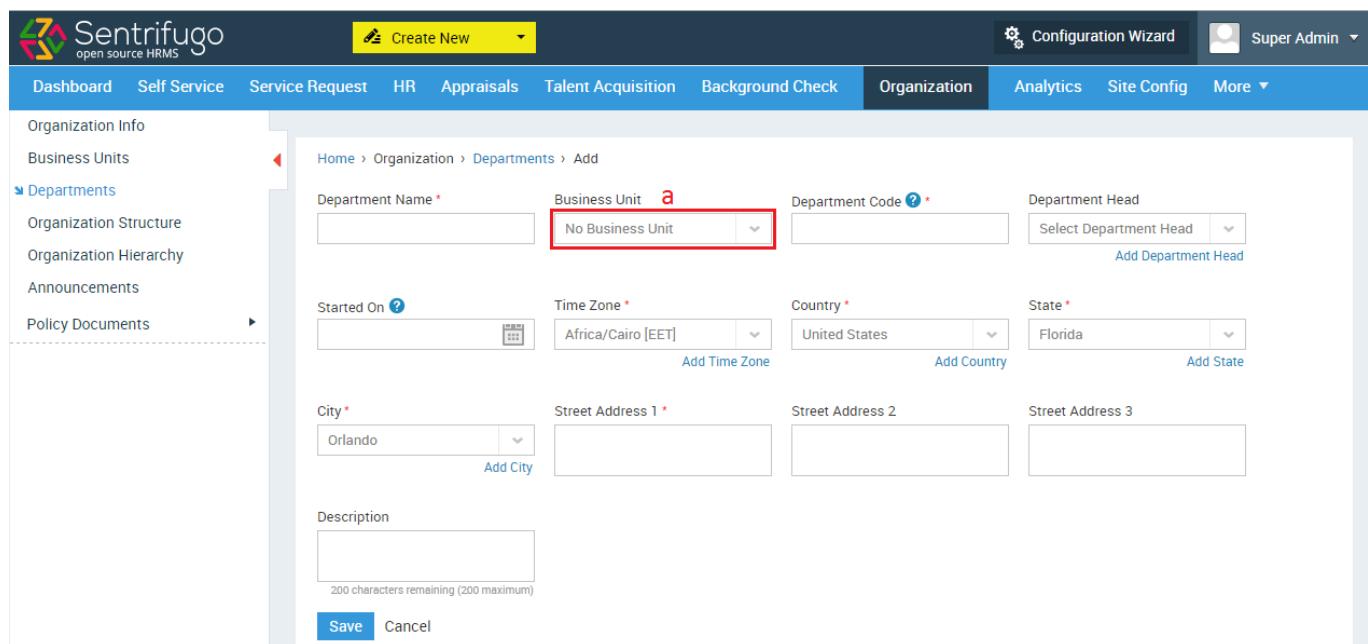
- d. Enter the necessary details
- e. Click **Save** button to create a new department

1.5.3 No Business Unit

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



Please refer Figure 18.



The screenshot shows the Sentrifugo application's 'Organization' section with the 'Departments' tab selected. On the left, there's a sidebar with links like 'Organization Info', 'Business Units', 'Departments' (which is active), 'Organization Structure', 'Organization Hierarchy', 'Announcements', and 'Policy Documents'. The main area displays a form titled 'Add'. It includes fields for 'Department Name' (with a placeholder 'a'), 'Business Unit' (set to 'No Business Unit' with a red border), 'Department Code' (placeholder 'a'), 'Department Head' (button 'Select Department Head'), 'Started On' (calendar icon), 'Time Zone' (dropdown 'Africa/Cairo [EET]'), 'Country' (dropdown 'United States'), 'State' (dropdown 'Florida'), 'City' (dropdown 'Orlando'), 'Street Address 1' (text input), 'Street Address 2' (text input), 'Street Address 3' (text input), and a 'Description' text area with a character count of '200 characters remaining (200 maximum)'. At the bottom are 'Save' and 'Cancel' buttons.

Figure 18

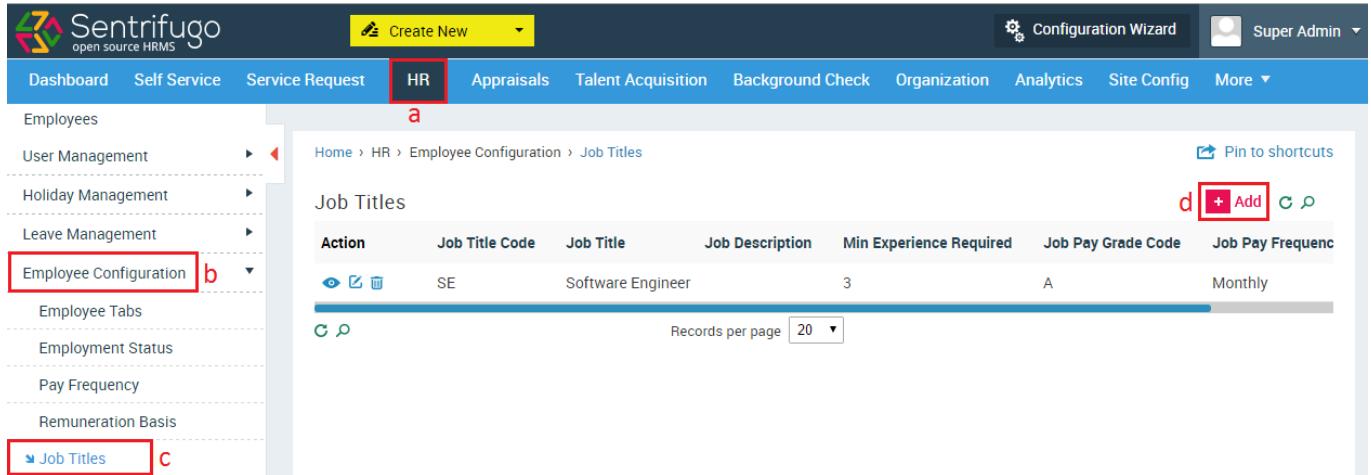
a. Select the option 'No Business Unit'

1.6 How do I add Job Titles and Positions?

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

1.6.1 Adding Job Titles

Please refer Figure 19.

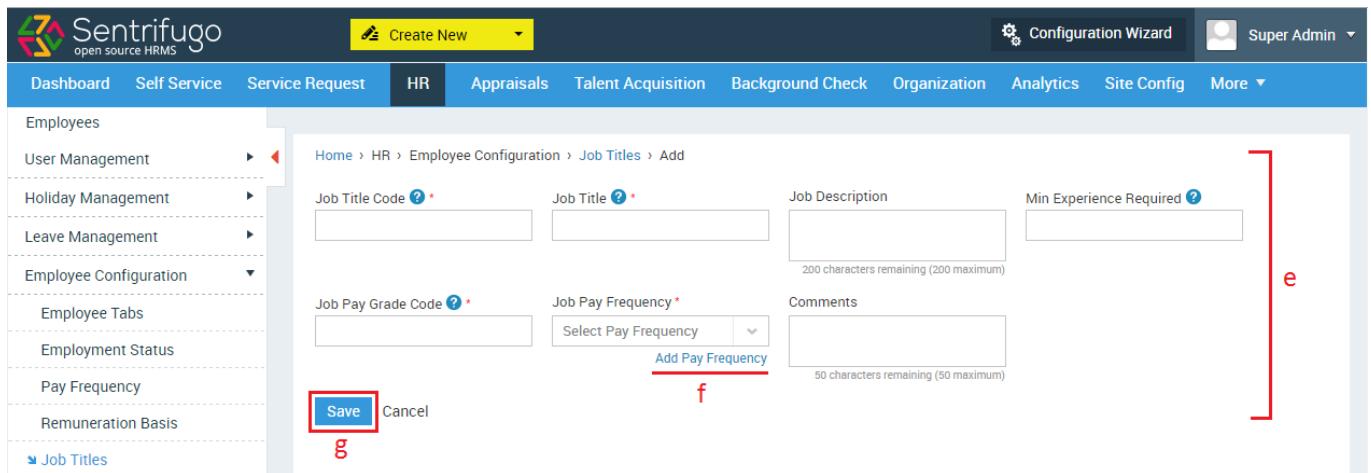


The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has 'HR' selected. The left sidebar has 'Employee Configuration' expanded, with 'Job Titles' selected. The main content area shows a table of job titles with columns: Action, Job Title Code, Job Title, Job Description, Min Experience Required, Job Pay Grade Code, and Job Pay Frequency. A red box labeled 'd' highlights the '+Add' button on the right side of the table header.

Figure 19

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

Please refer Figure 20.



The screenshot shows the 'Add Job Title' form. The top navigation bar has 'HR' selected. The left sidebar shows 'Job Titles' selected. The form fields include: Job Title Code (required), Job Title (required), Job Description (with note: 200 characters remaining (200 maximum)), Min Experience Required (with note: 200 characters remaining (200 maximum)), Job Pay Grade Code (required), Job Pay Frequency (with note: 50 characters remaining (50 maximum)), and Comments. A red box labeled 'e' points to the 'Comments' field. A red box labeled 'f' points to the 'Add Pay Frequency' link. A red box labeled 'g' points to the 'Save' button.

Figure 20

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

1.6.2 Adding Positions

Please refer Figure 21.

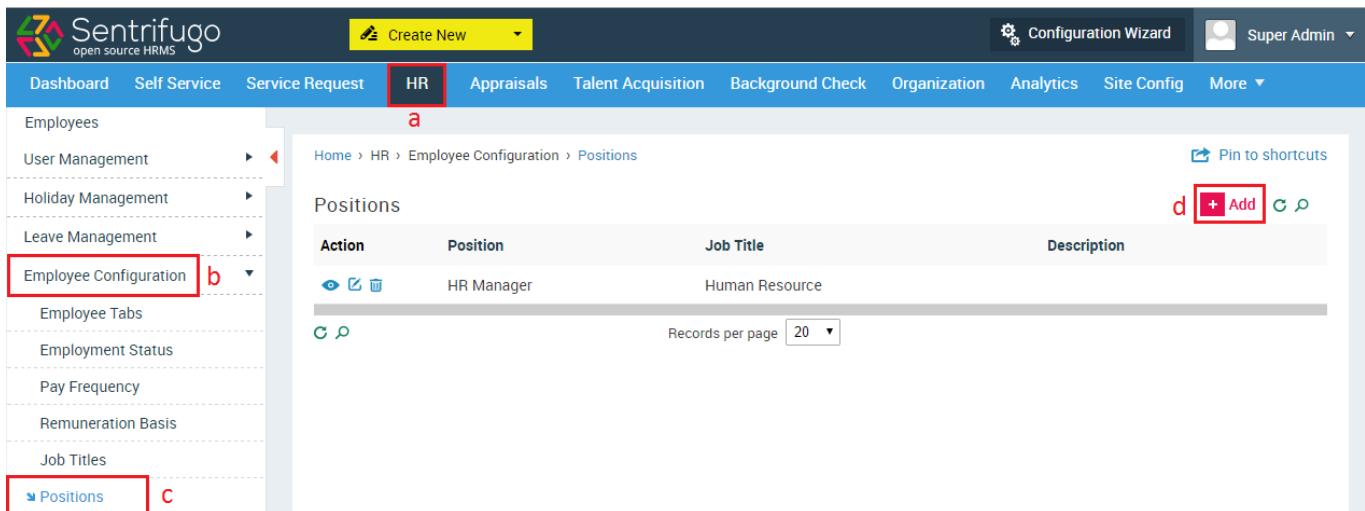


Figure 21

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

Please refer Figure 22.

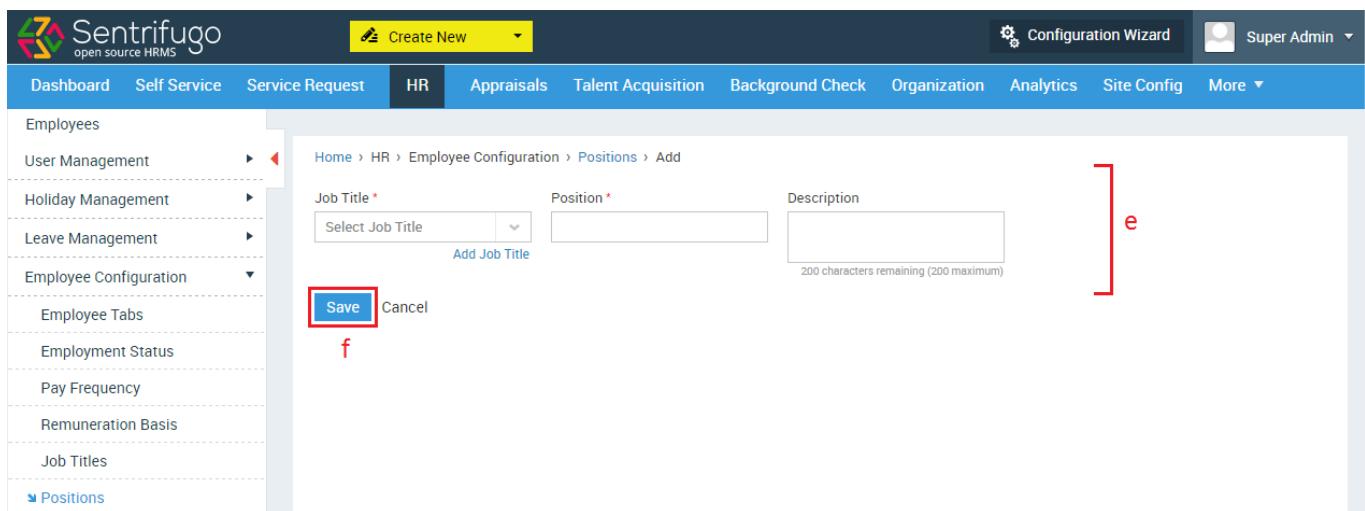


Figure 22

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



You can create a Position only after creating a Job Title

2. Dashboard

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

2.1 How do I add Widgets?

Please refer Figure 23.

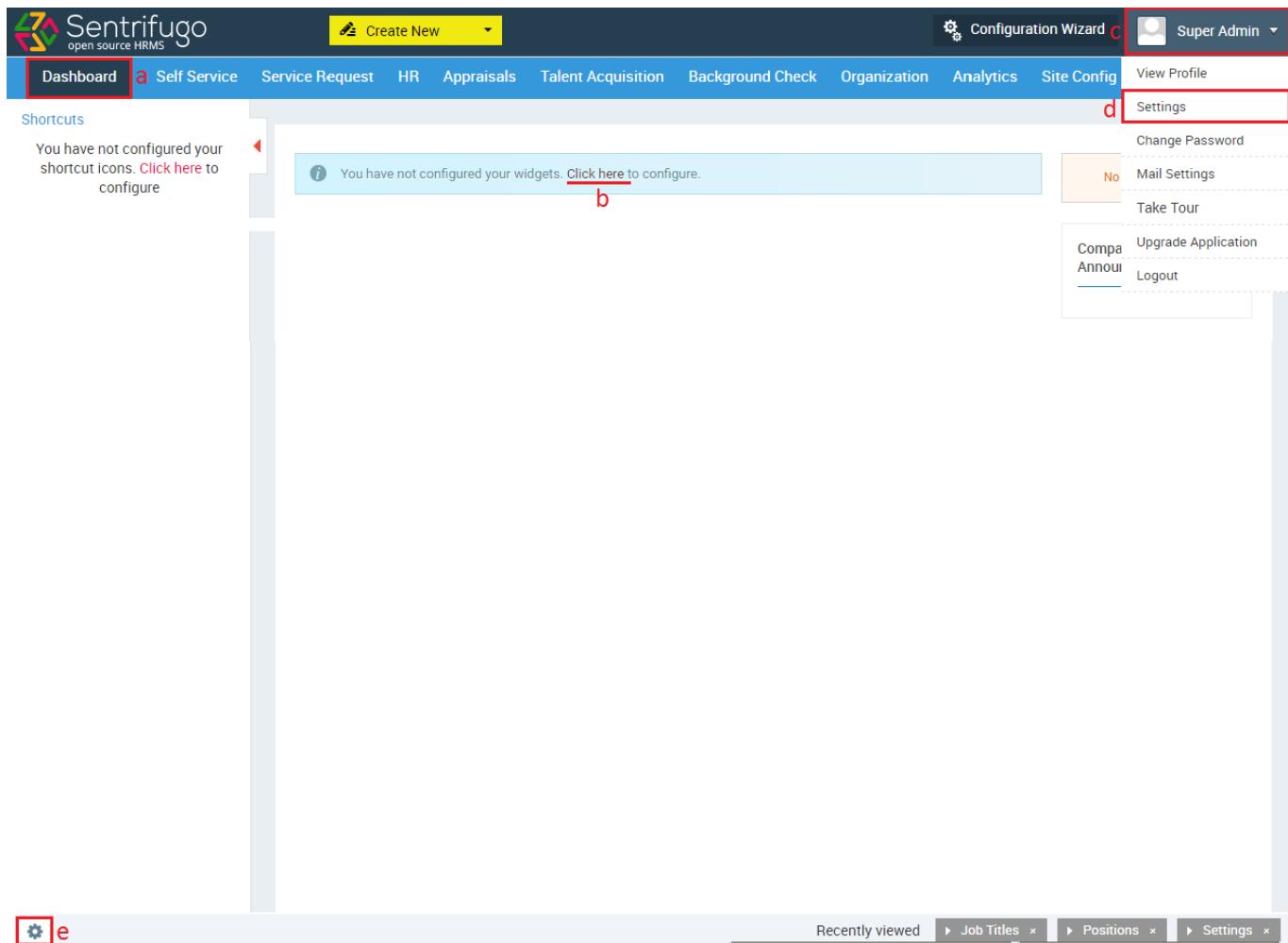


Figure 23

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

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

Or

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

Or

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

Please refer Figure 24.

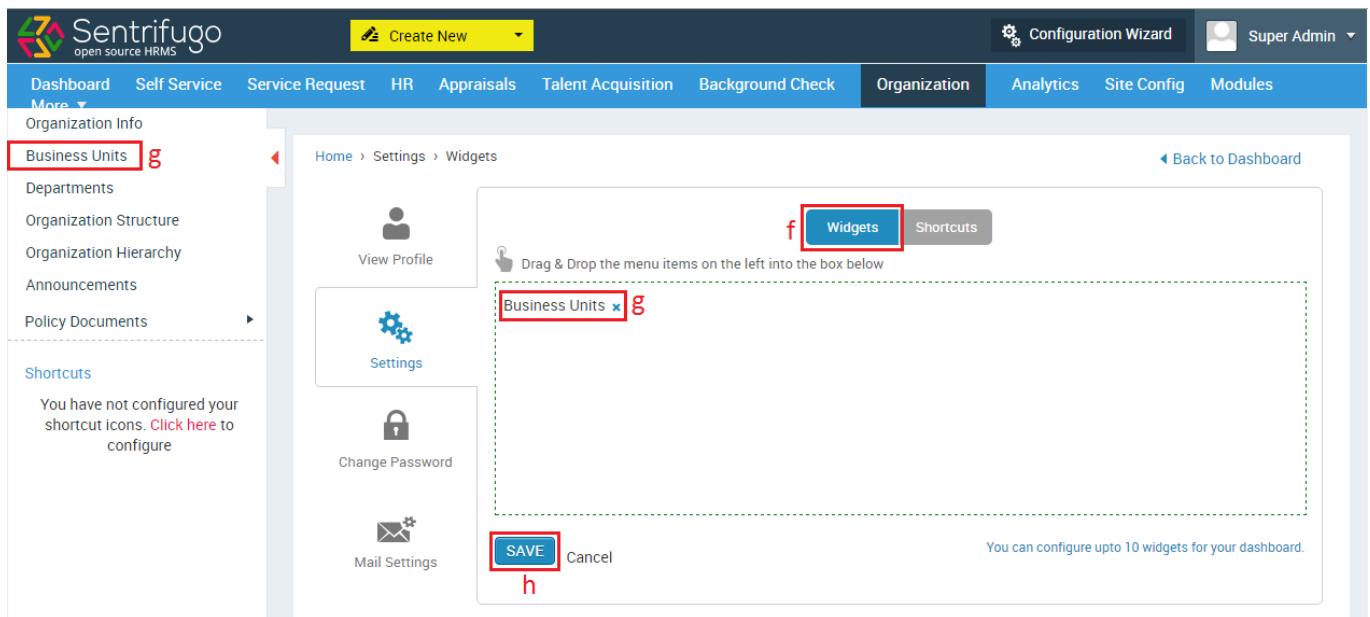


Figure 24

(Common for all)

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

2.2 How do I add Shortcuts?

Please refer Figure 25.

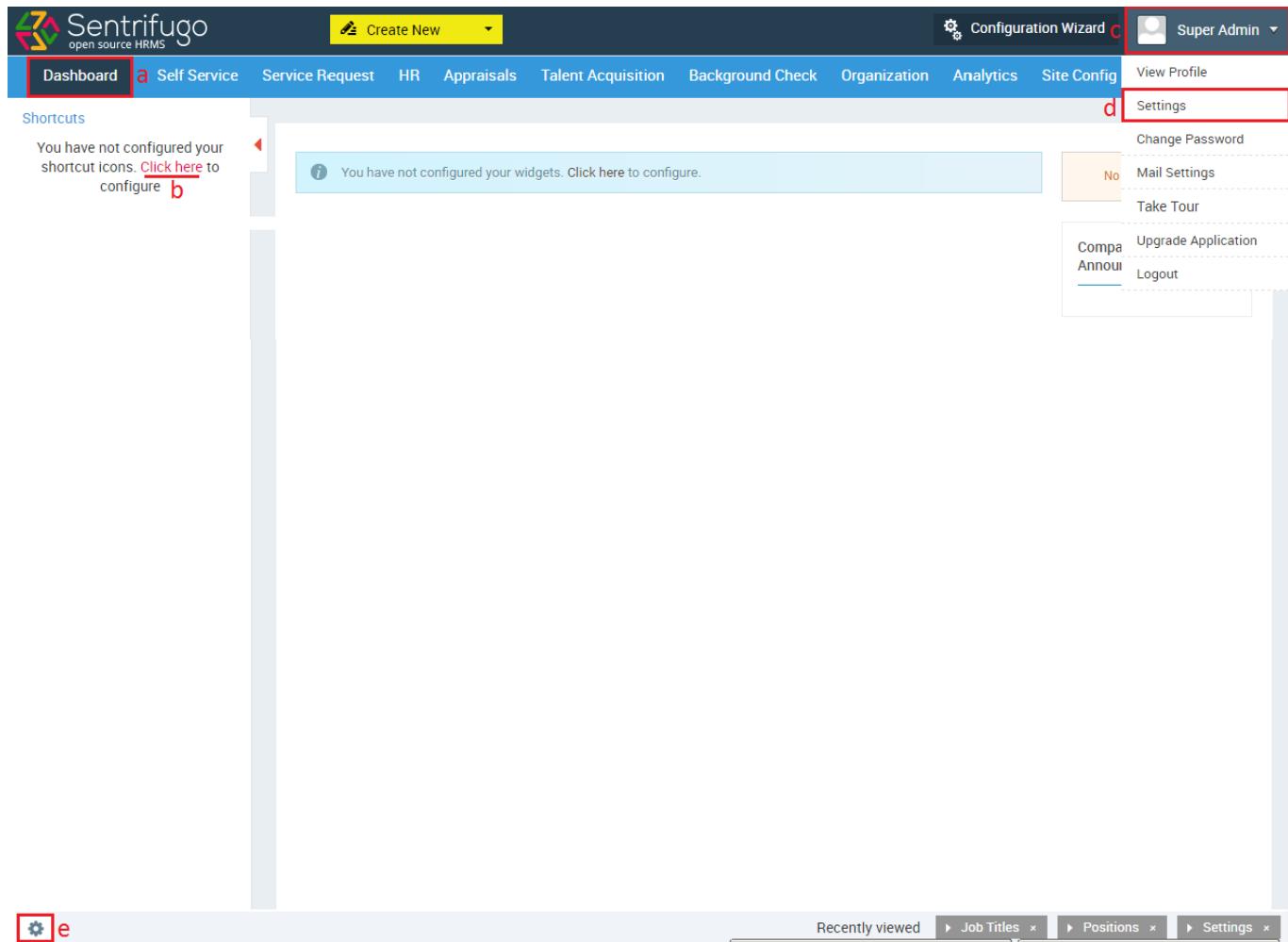


Figure 25

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

- 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.

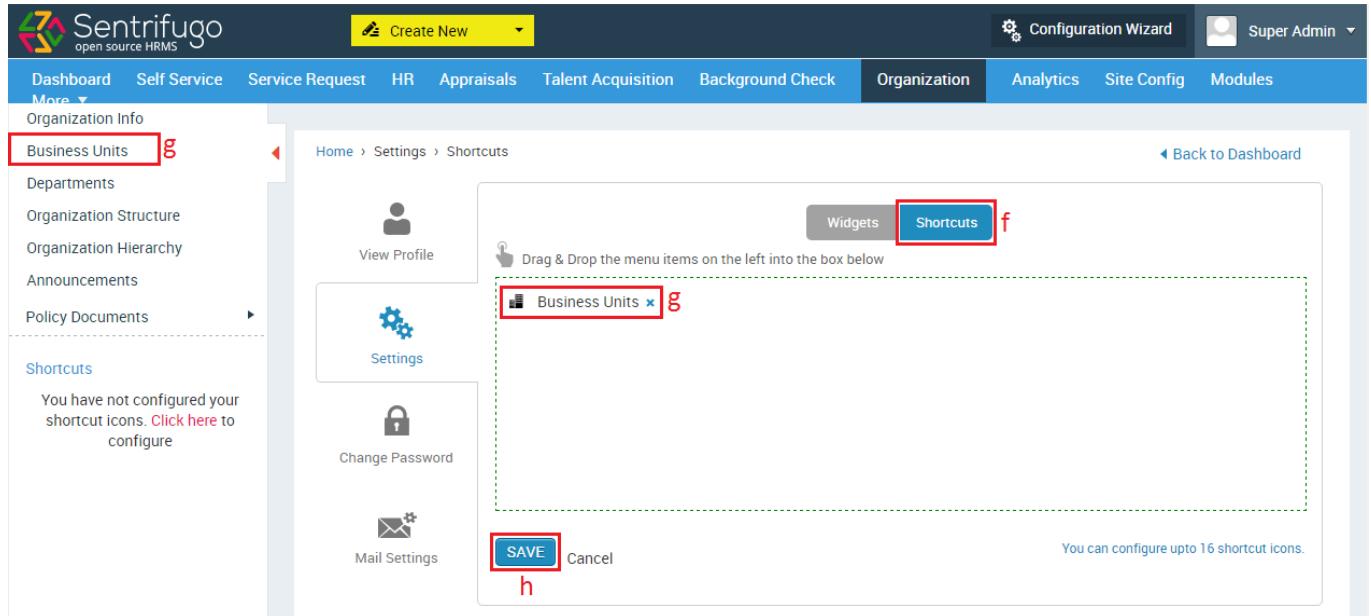
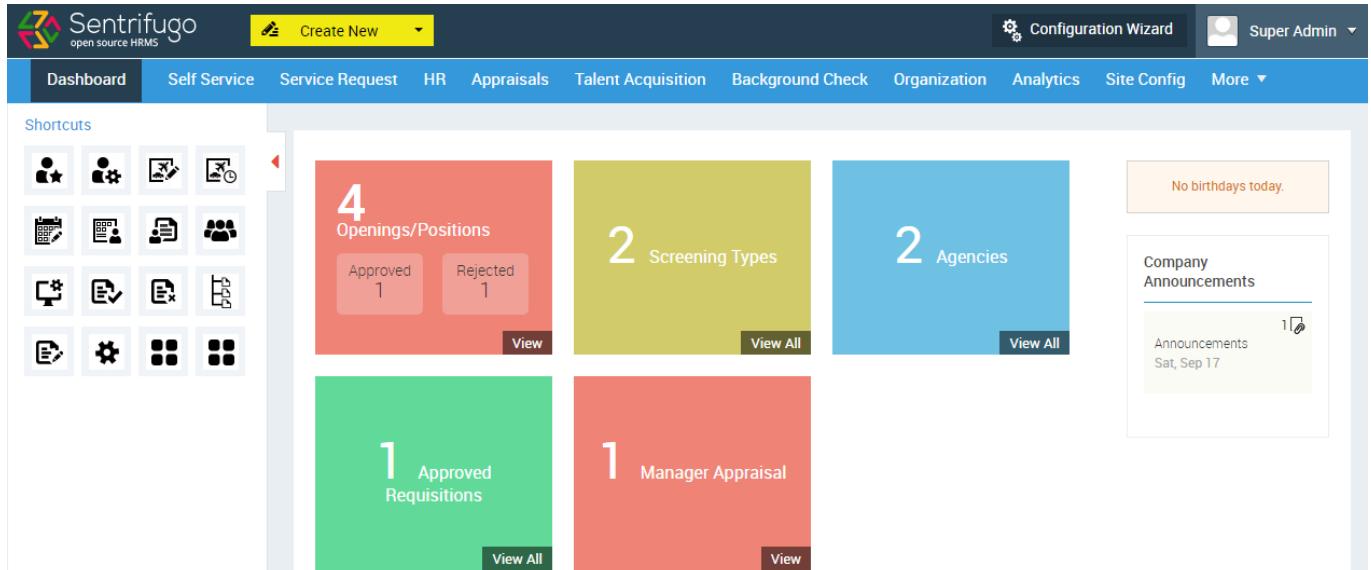


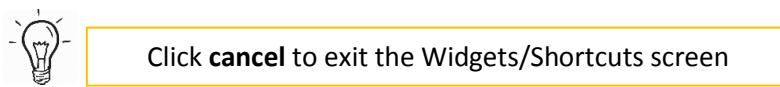
Figure 26

(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:





2.3 How do I add Announcements?

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

Please refer Figure 27.

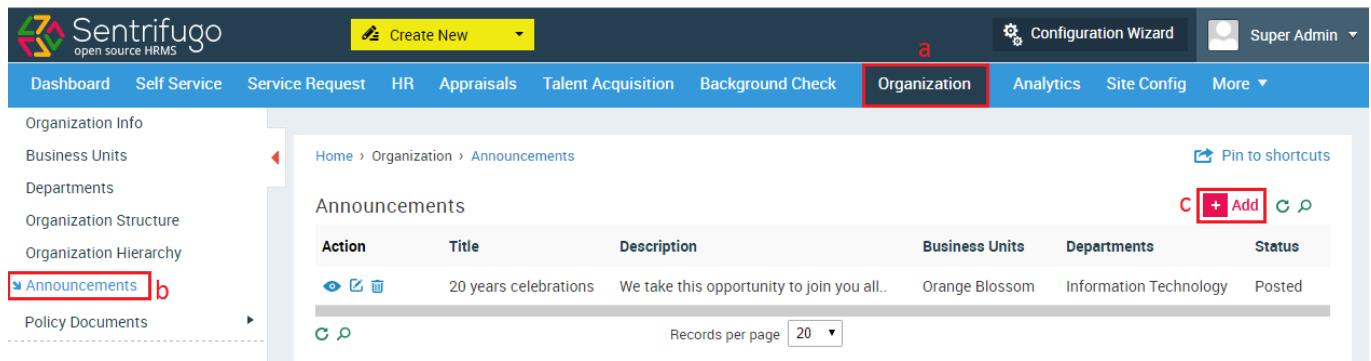
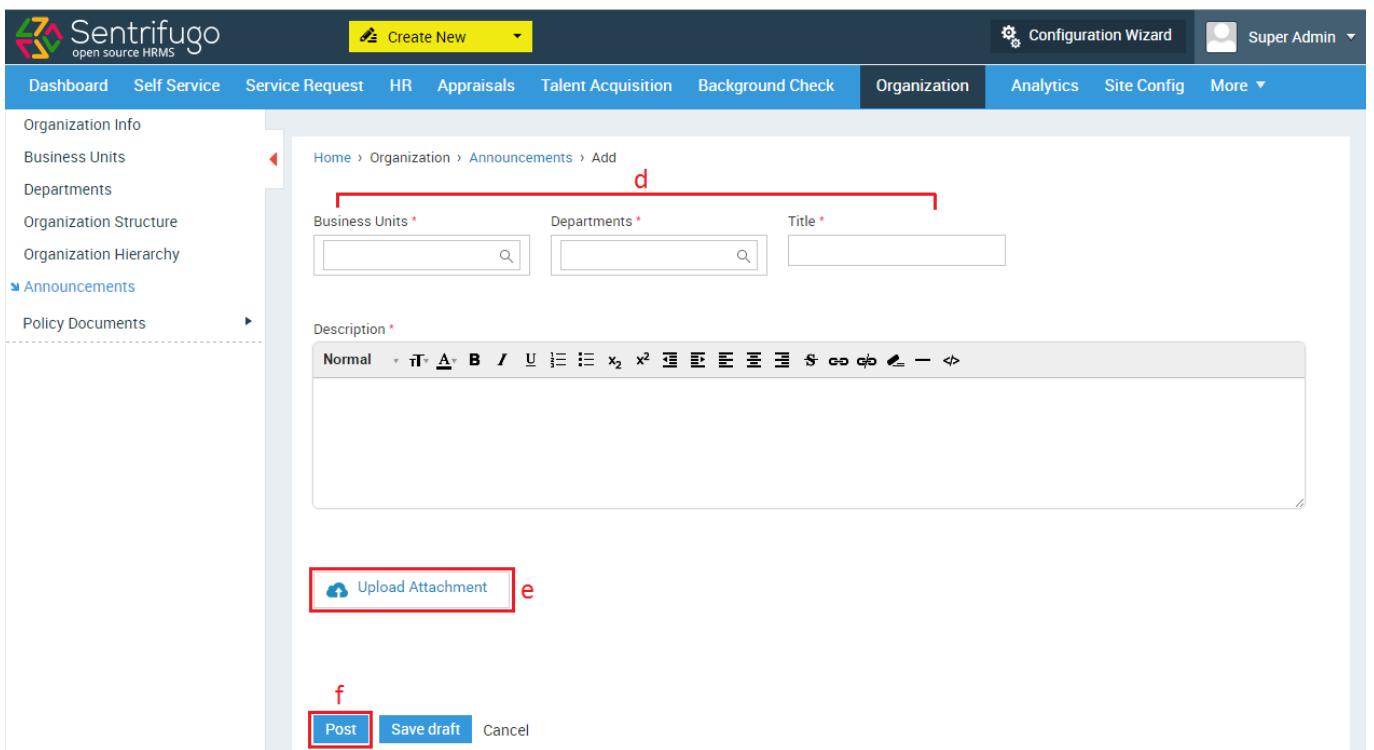


Figure 27

- 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 interface. The top navigation bar has a 'Create New' button. On the right, there are links for 'Configuration Wizard', 'Super Admin', and other system settings. The main menu on the left includes 'Organization Info', 'Business Units', 'Departments', 'Organization Structure', 'Organization Hierarchy', 'Announcements' (which is selected and highlighted with a blue background), and 'Policy Documents'. The 'Announcements' page displays a form for adding a new announcement. It requires 'Business Units', 'Departments', and 'Title' (all marked with red asterisks). Below these are input fields for 'Description' with a rich text editor toolbar. An 'Upload Attachment' button is present. At the bottom are three buttons: 'Post' (highlighted with a red box), 'Save draft', and 'Cancel'.

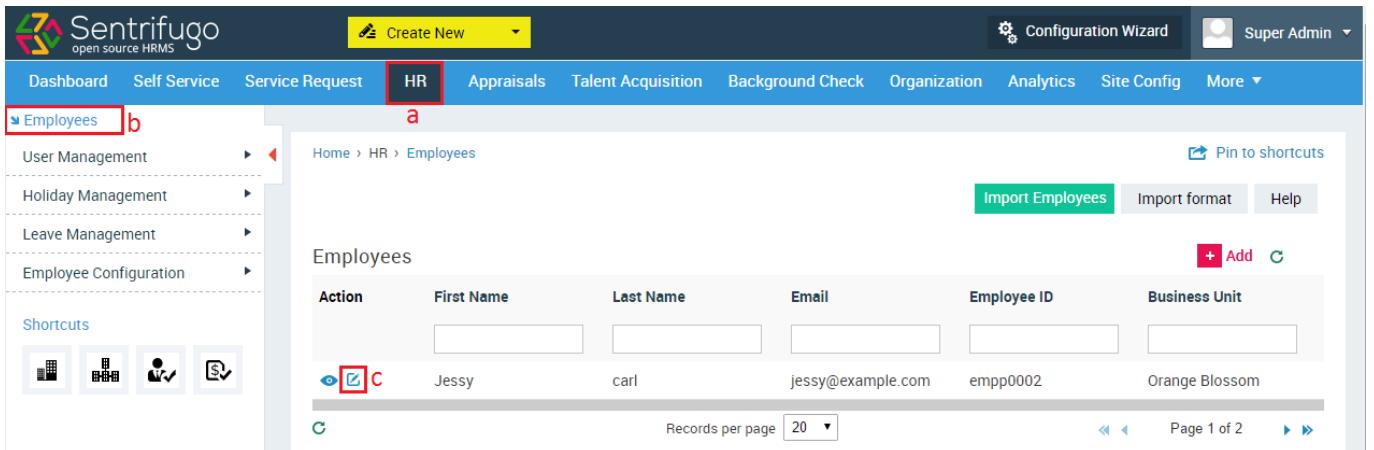
Figure 28

- 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.



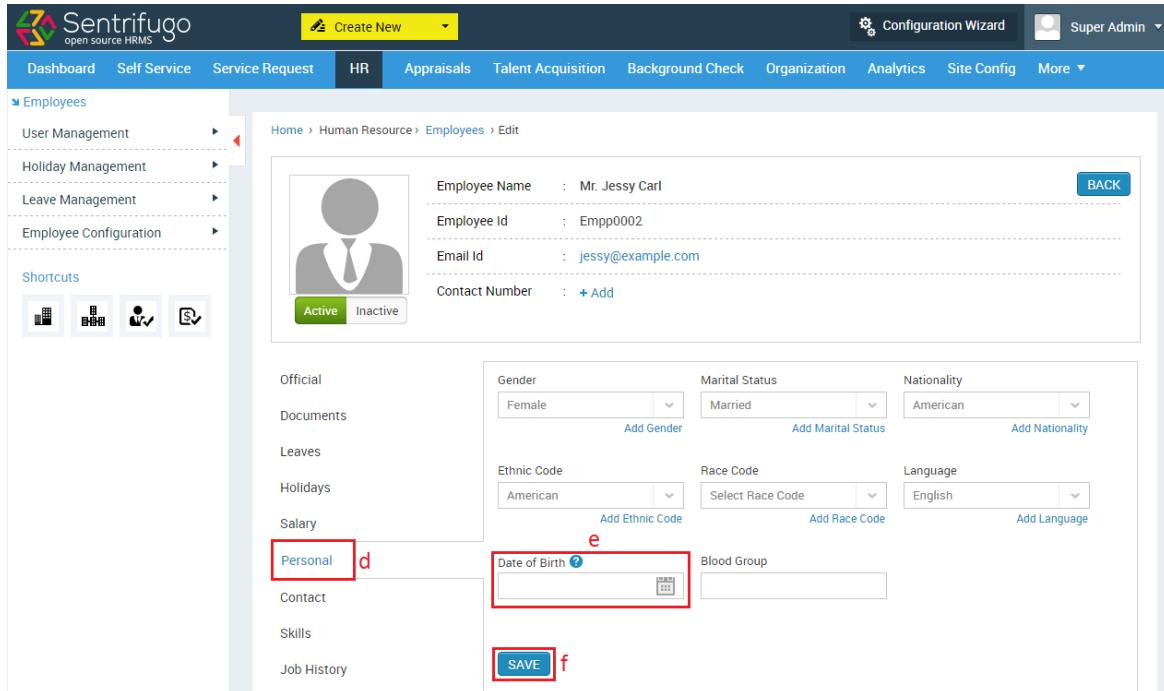
The screenshot shows the 'HR' module of the Sentrifugo application. The top navigation bar has a 'Create New' button and a 'Pin to shortcuts' link. On the right, there are links for 'Configuration Wizard', 'Super Admin', and other system settings. The main menu on the left includes 'Dashboard', 'Self Service', 'Service Request', 'HR' (highlighted with a red box), 'Appraisals', 'Talent Acquisition', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The 'Employees' page displays a table of employees. The table has columns for Action, First Name, Last Name, Email, Employee ID, and Business Unit. One record is listed: Jessy, carl, jessy@example.com, empp0002, Orange Blossom. There are buttons for 'Import Employees', 'Import format', and 'Help' at the top right. A red box labeled 'a' highlights the 'HR' tab. A red box labeled 'b' highlights the 'Employees' link in the sidebar. A red box labeled 'c' highlights the 'Edit' icon in the employee table row.

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.



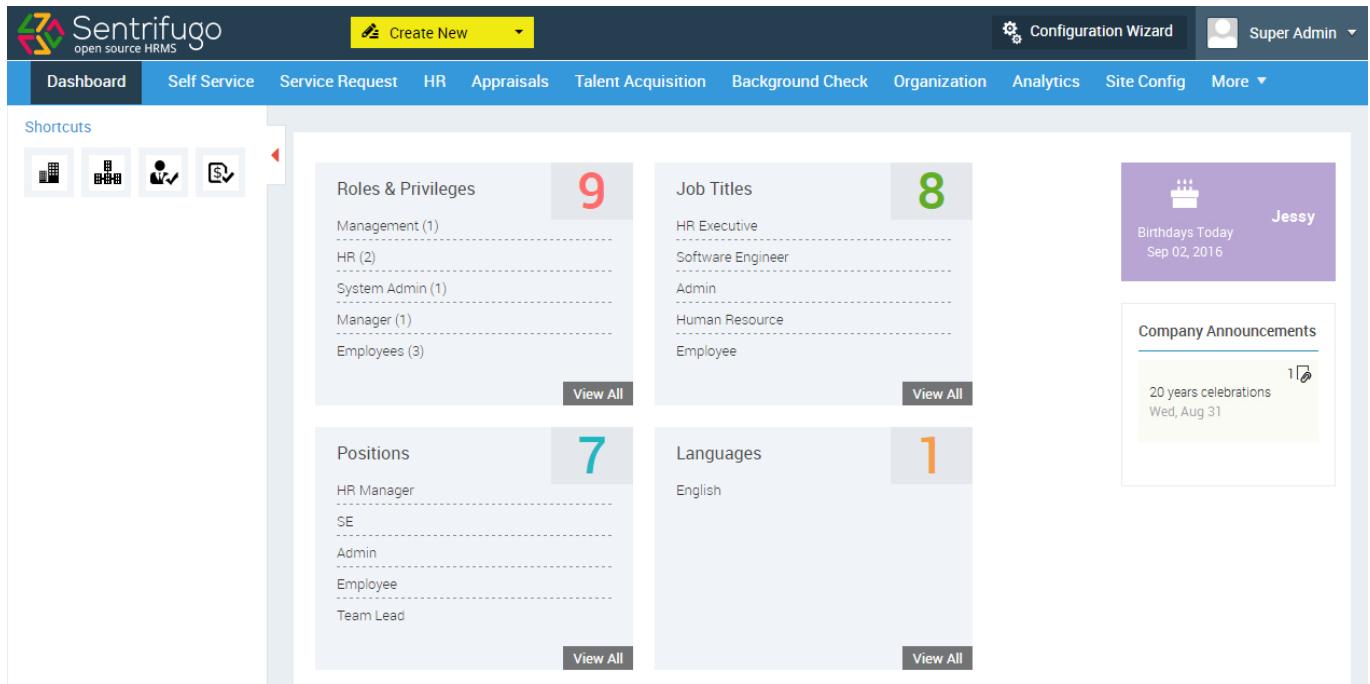
The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has tabs for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar under 'Employees' lists User Management, Holiday Management, Leave Management, and Employee Configuration. Under 'Shortcuts', there are icons for Active and Inactive employees. 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 sections for Official, Documents, Leaves, Holidays, Salary, and Personal. The 'Personal' section is currently active, with a red box labeled 'd' highlighting it. 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. A red box labeled 'e' highlights the 'Date of Birth' field. At the bottom of the form is a blue 'SAVE' button, which is also highlighted with a red box 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 HRMS dashboard with the following sections:

- Shortcuts**: Icons for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More.
- Create New** button.
- Configuration Wizard** and **Super Admin** dropdown.
- Dashboard Statistics**:
 - Roles & Privileges** (9): Management (1), HR (2), System Admin (1), Manager (1), Employees (3). [View All](#)
 - Job Titles** (8): HR Executive, Software Engineer, Admin, Human Resource, Employee. [View All](#)
 - Positions** (7): HR Manager, SE, Admin, Employee, Team Lead. [View All](#)
 - Languages** (1): English. [View All](#)
- Birthday Announcements** (Jessy, Sep 02, 2016)
- Company Announcements** (20 years celebrations, Wed, Aug 31)

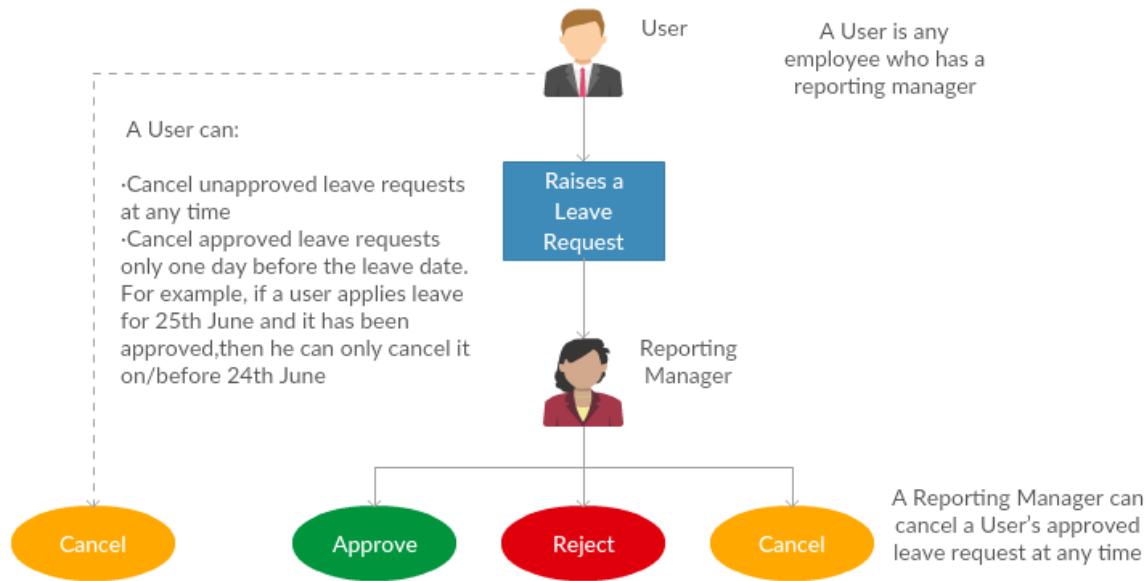
Figure 31



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

3. Leave Management

One of the main features available in Self Service is Leave Management. You can raise leave requests and have them approved by your reporting manager. 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.



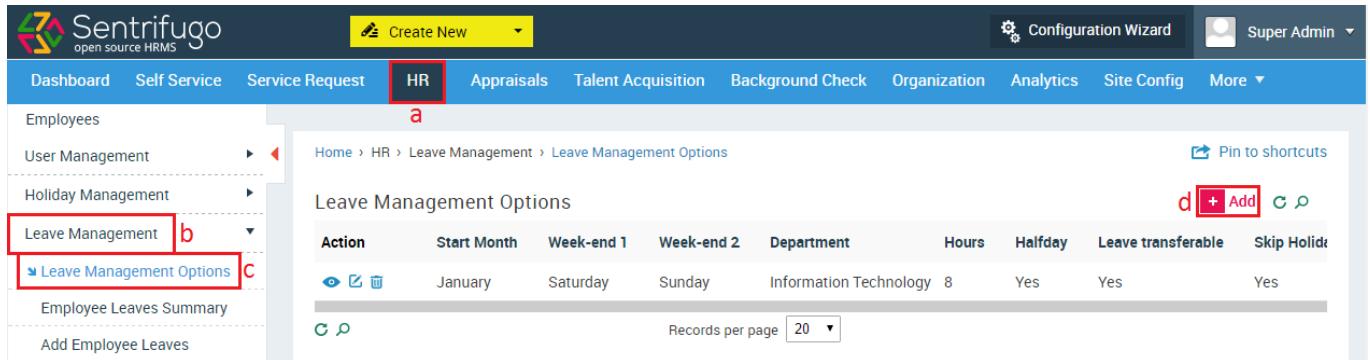
After an approved leave request has been cancelled, the leave(s) are credited back to the user's leave balance.

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.



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

Figure 32

To configure leave management options:

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

Please refer Figure 33.

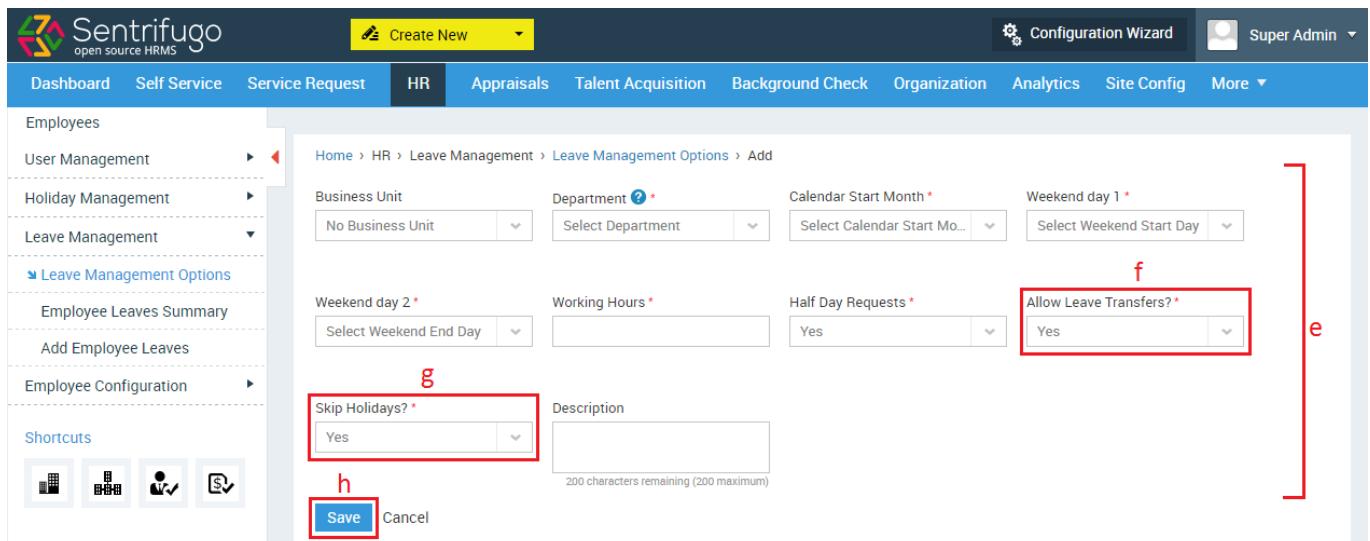


Figure 33

- Fill in the required details

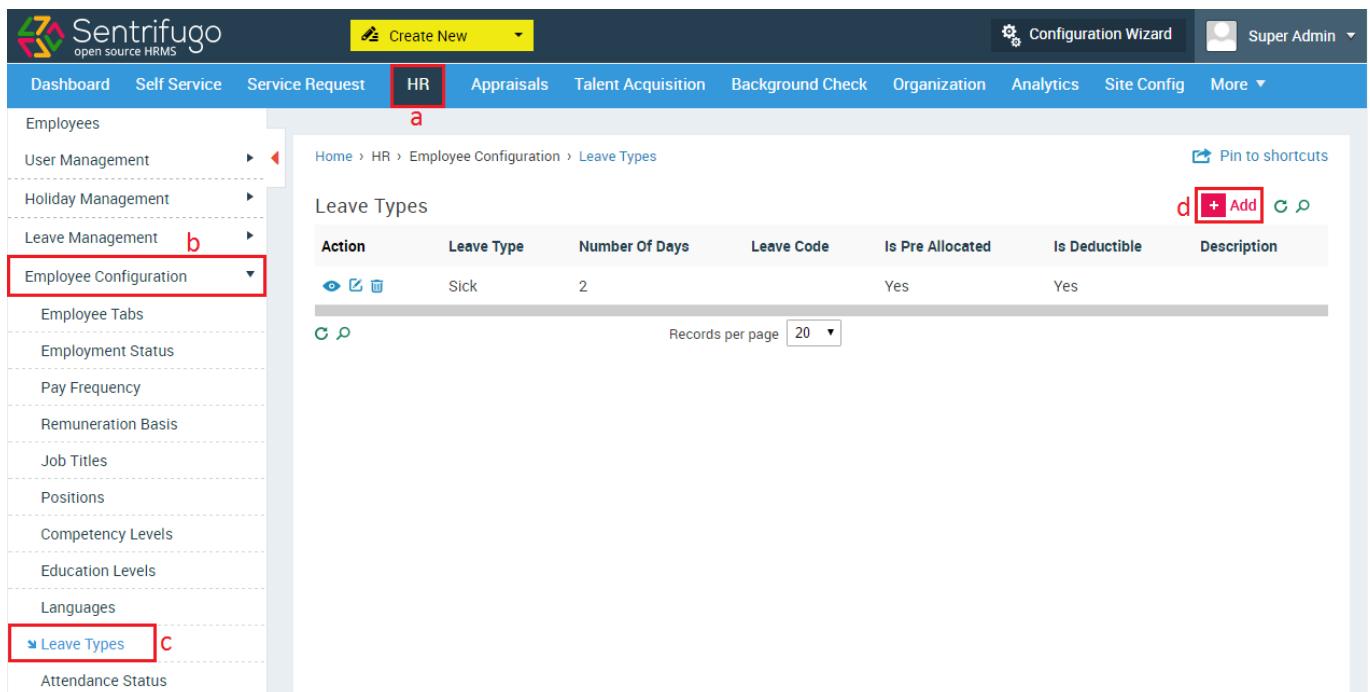
- f. **Allow Leave Transfers:** If there are any unused leaves for an employee in the current year, then by using this option they will be carried forward to the next year.
- g. **Skip Holidays:** If a user applies for a vacation which includes the weekend or any pre-declared holiday, then by using this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



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

3.2 How do I create Leave Types?

Please refer Figure 34.

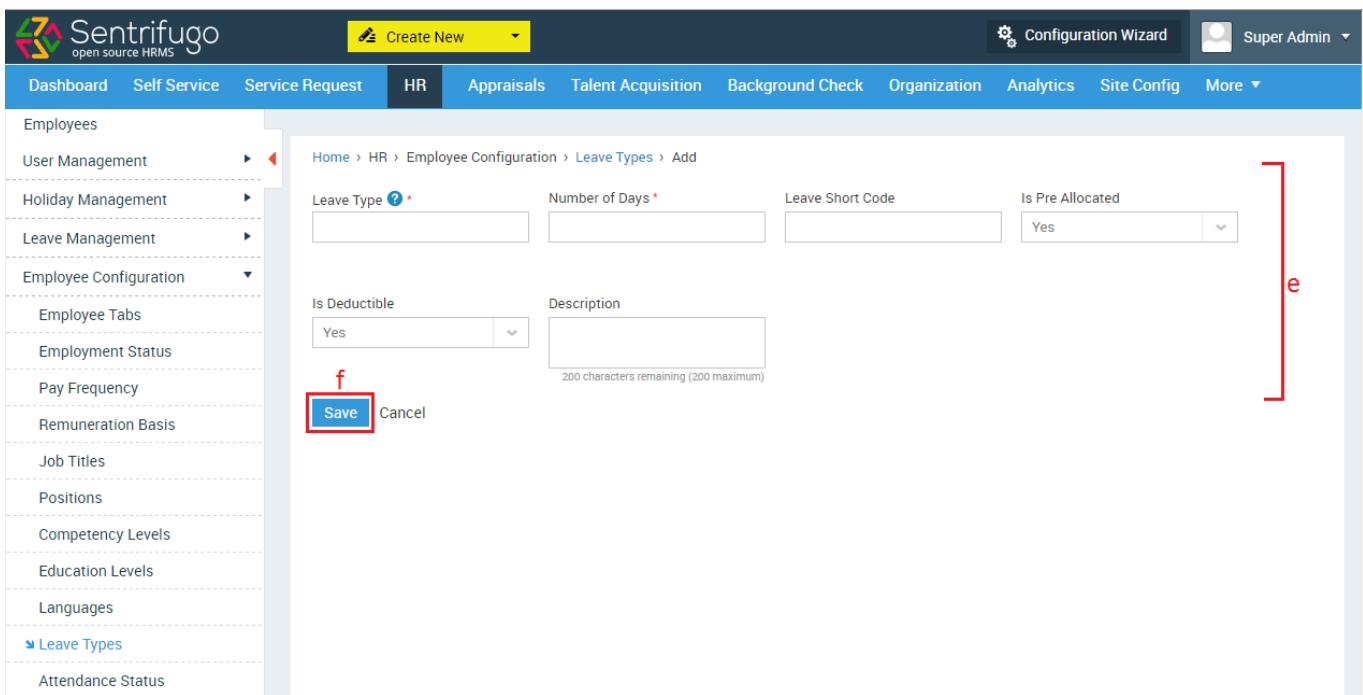


Action	Leave Type	Number Of Days	Leave Code	Is Pre Allocated	Is Deductible	Description
	Sick	2		Yes	Yes	

Figure 34

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

Please refer Figure 35.



The screenshot shows the Sentrifugo HRMS 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 'Employees' lists various management options like User Management, Holiday Management, Leave Management, Employee Configuration, and Leave Types (which is currently selected). The main content area displays a 'Leave Types' creation form with fields for Leave Type, Number of Days, Leave Short Code, Is Pre Allocated, Is Deductible, and Description. A red bracket labeled 'e' points to the 'Is Pre Allocated' dropdown, and a red box labeled 'f' points to 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

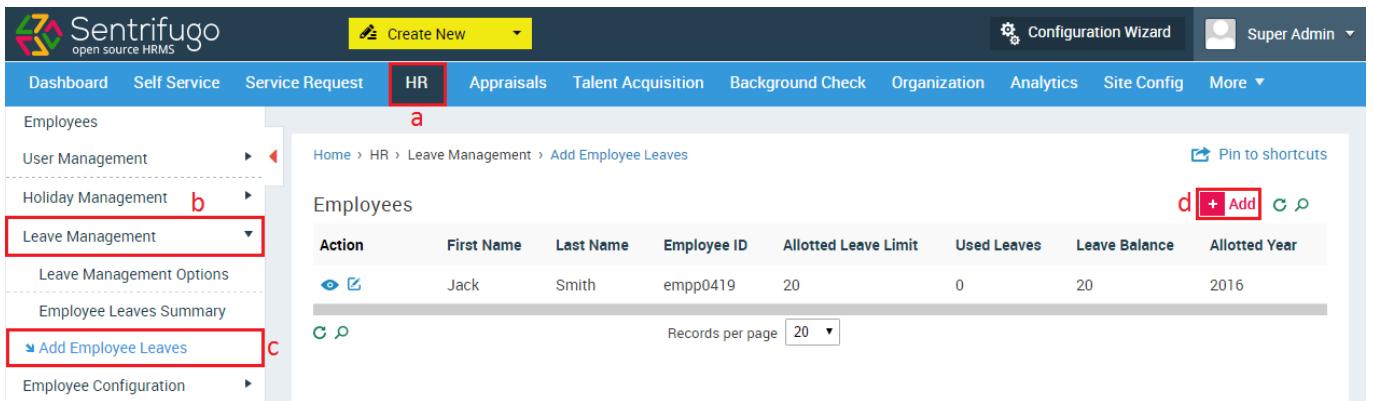


Figure 36

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

Please refer Figure 37

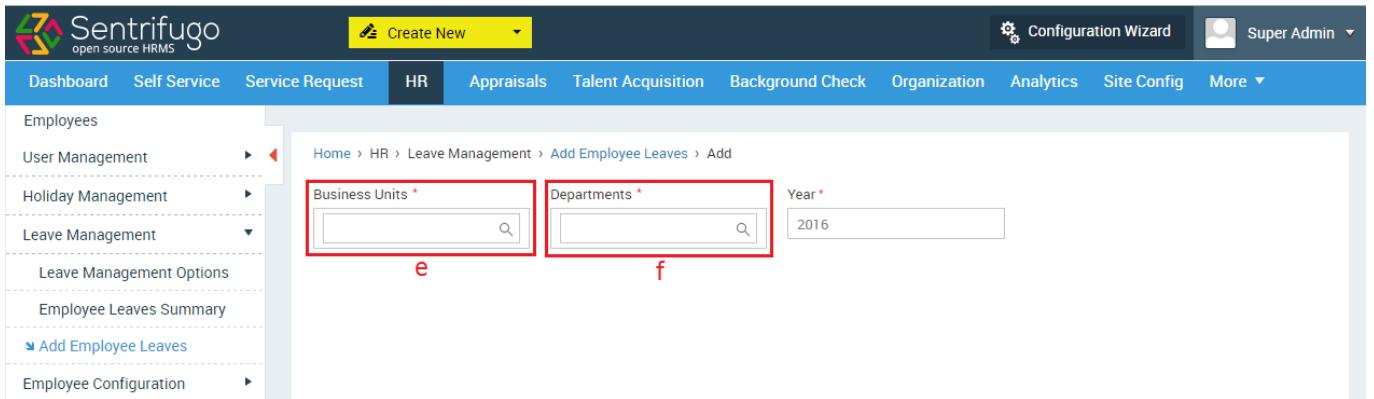


Figure 37

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

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

Please refer Figure 38

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

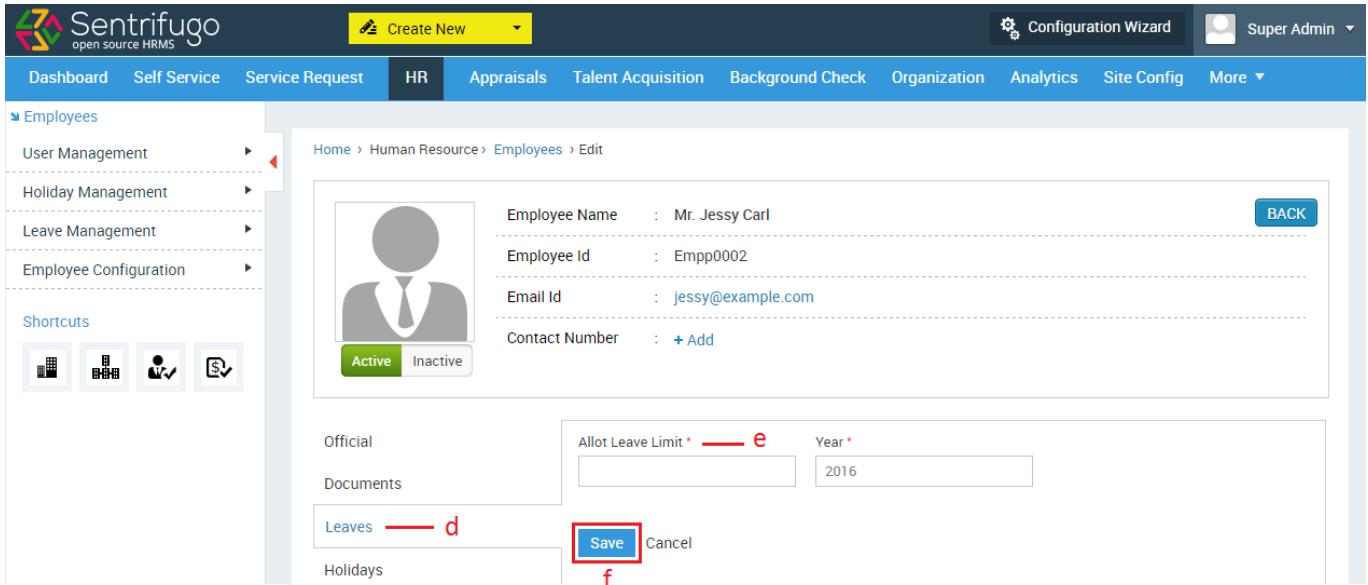
Action	First Name	Last Name	Email	Employee ID	Business Unit
	Jessy	carl	jessy@example.com	empp0002	Orange Blossom

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', and 'Super Admin'. The main menu has tabs for Dashboard, Self Service, Service Request, HR (which is selected), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left, there's a sidebar with 'Employees' expanded, showing User Management, Holiday Management, Leave Management, and Employee Configuration. Below that is a 'Shortcuts' section with icons for Home, HR, Employees, and Reports. The main content area shows an employee profile for 'Mr. Jessy Carl' with fields for Employee Name, Employee ID, Email Id, and Contact Number. A 'Leaves' section is present, with a red box labeled 'd' pointing to it. At the bottom right of the form are 'Save' and 'Cancel' buttons, with a red box labeled 'f' pointing to the 'Save' button.

Figure 40

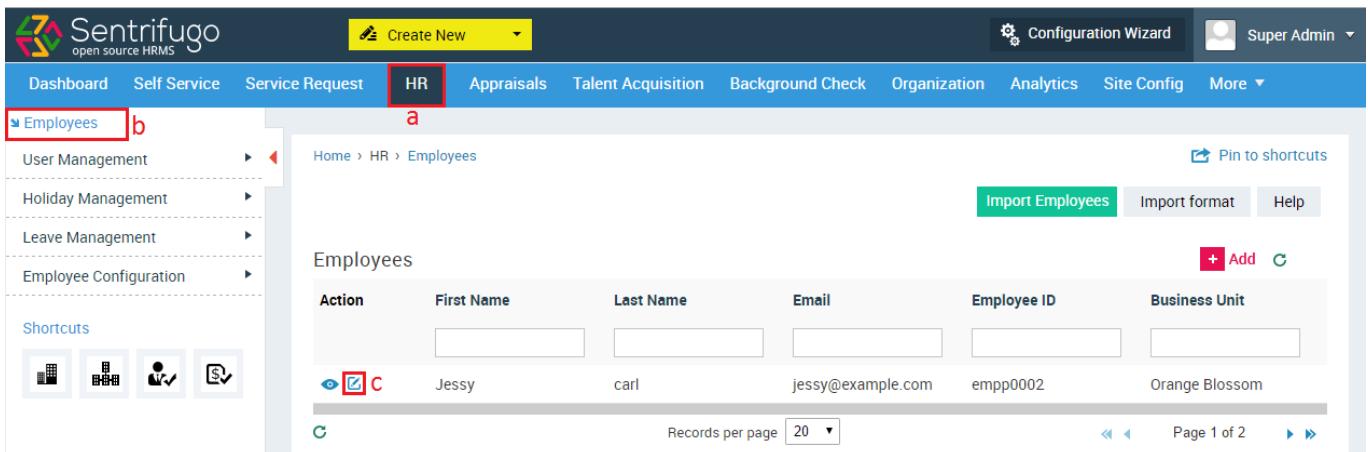
- d. Click **Leaves** on the left menu panel (left side of the form)
- e. Enter the number of days for this employee
- f. Click **SAVE** button



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 of the Sentrifugo HRM system. 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. The left sidebar has 'Employees' selected, with sub-options for User Management, Holiday Management, Leave Management, and Employee Configuration. It also includes a 'Shortcuts' section with icons for Home, HR, Employees, and Reports. The main content area displays a table of employees with columns for Action, First Name, Last Name, Email, Employee ID, and Business Unit. One row for 'Jessy' is shown with a red box labeled 'c' pointing to the 'Action' column. At the top right of the table area are buttons for 'Import Employees', 'Import format', and 'Help'. Below the table are controls for 'Records per page' (set to 20) and navigation buttons for 'Page 1 of 2'.

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

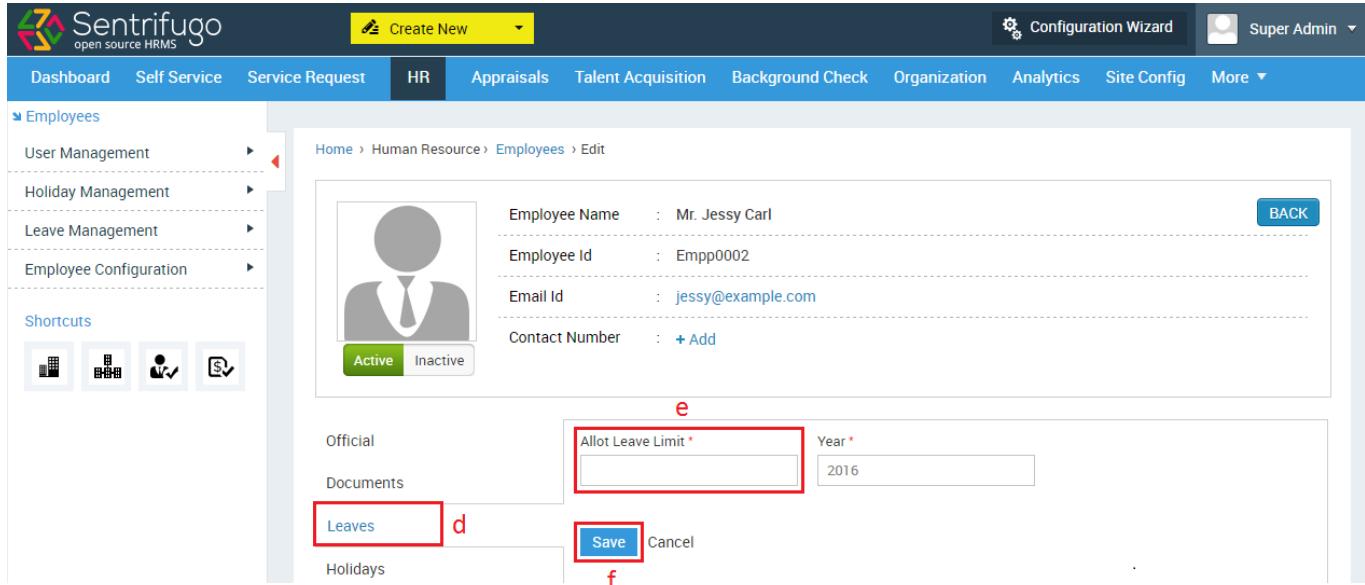


Figure 42

- 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)

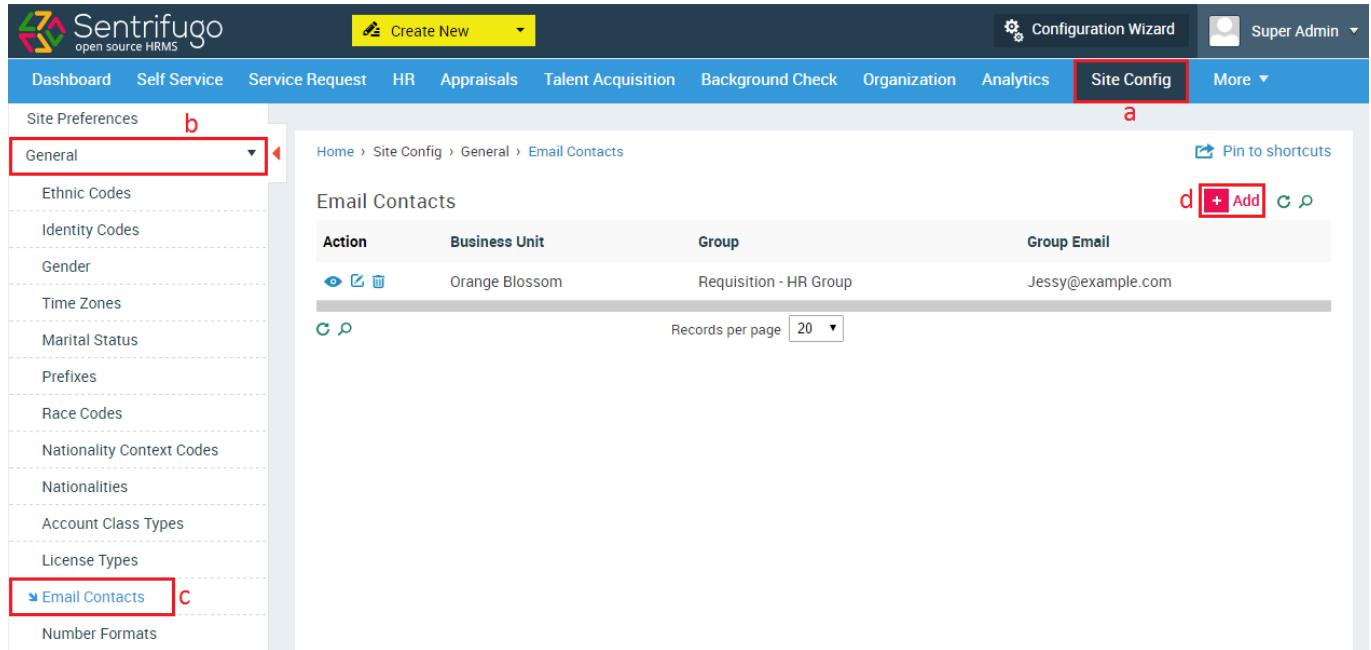
3.5 How do I create HR Email Group for Leave Management?

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

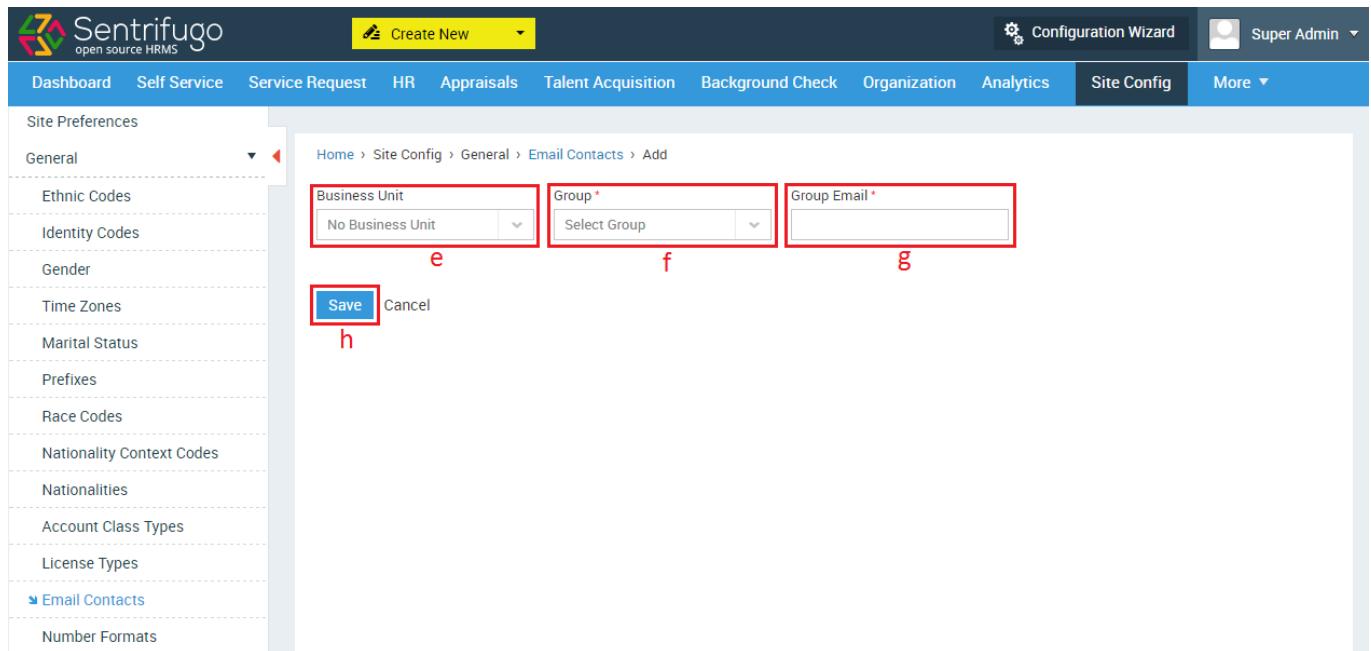


The screenshot shows the Sentrifugo interface. The top navigation bar includes 'Create New', 'Configuration Wizard', 'Super Admin', and 'Site Config'. The 'Site Config' tab is active. On the left, a sidebar lists 'Site Preferences' with 'General' selected. Under 'General', 'Email Contacts' is highlighted. The main content area shows 'Email Contacts' with one record: 'Orange Blossom' under 'Business Unit', 'Requisition - HR Group' under 'Group', and 'Jessy@example.com' under 'Group Email'. A '+' Add button is visible. The URL in the browser is 'Home > Site Config > General > Email Contacts'.

Figure 43

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

Please refer Figure 44



The screenshot shows the 'Add' form for 'Email Contacts'. The 'Business Unit' dropdown is set to 'No Business Unit' (e). The 'Group' dropdown is labeled 'Select Group' (f). The 'Group Email' input field is empty (g). Below the form are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red box (h).

Figure 44

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



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

3.6 How do I raise a Leave Request?

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



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

To raise a leave request:

Please refer Figure 45

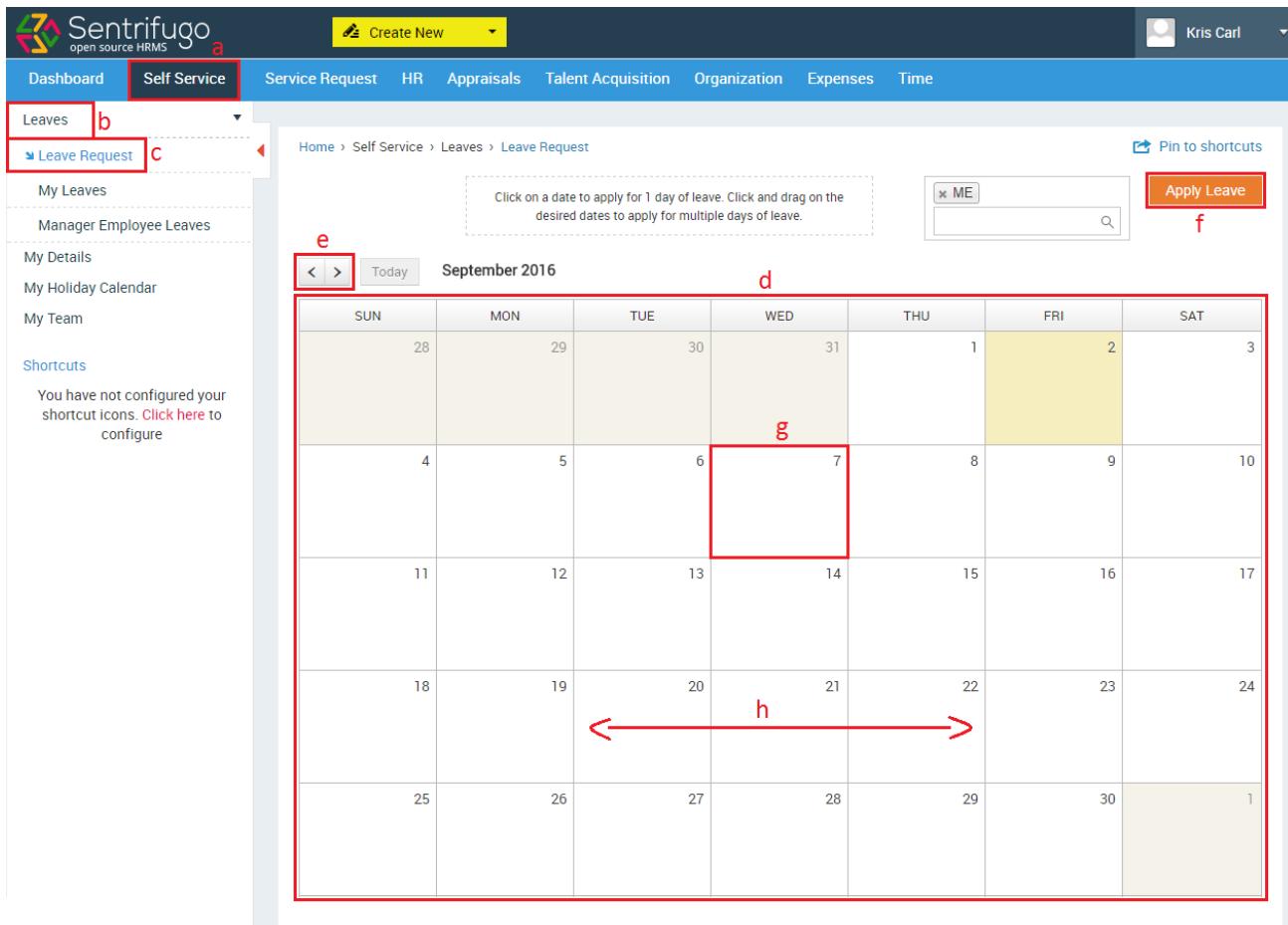


Figure 45

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

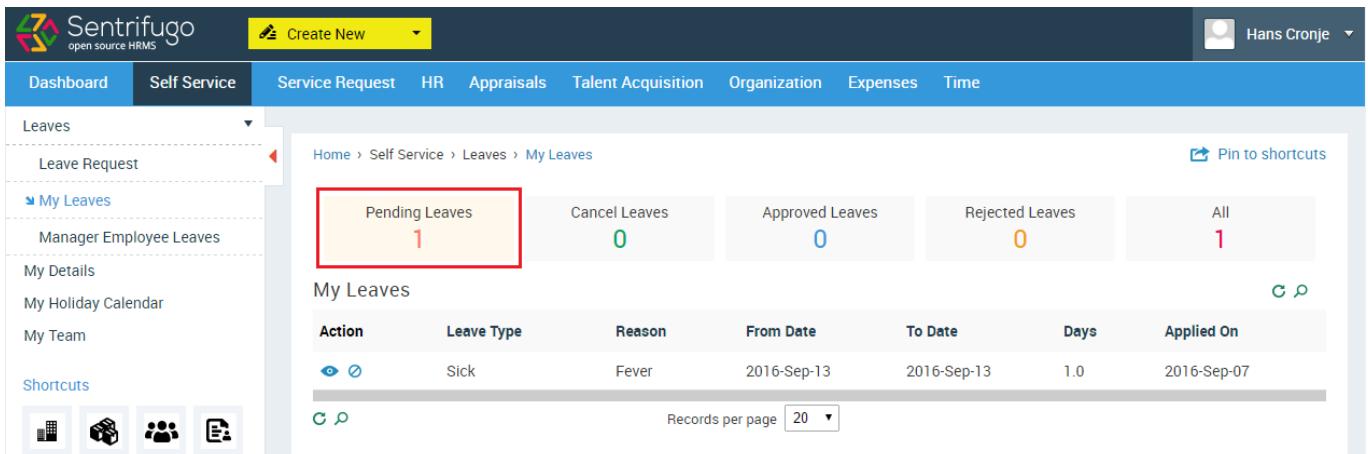
Available Leaves *	Leave Type *	Reason *
20	Select Leave Type	30 characters remaining (30 maximum)
From ? *	To ? *	Leave For *
2016-Sep-14	2016-Sep-14	Full Day
Days	Reporting Manager *	
1	Jim Jim	
<input type="button" value="Apply"/> <input type="button" value="Cancel"/>		

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 dashboard. The navigation bar includes links for Create New, Dashboard, Self Service (selected), Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. The left sidebar has sections for Leaves (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 (Edit icon), Leave Type (Sick), Reason (Fever), From Date (2016-Sep-13), To Date (2016-Sep-13), Days (1.0), and Applied On (2016-Sep-07). Navigation icons for Home, Pin to shortcuts, and search are also present.

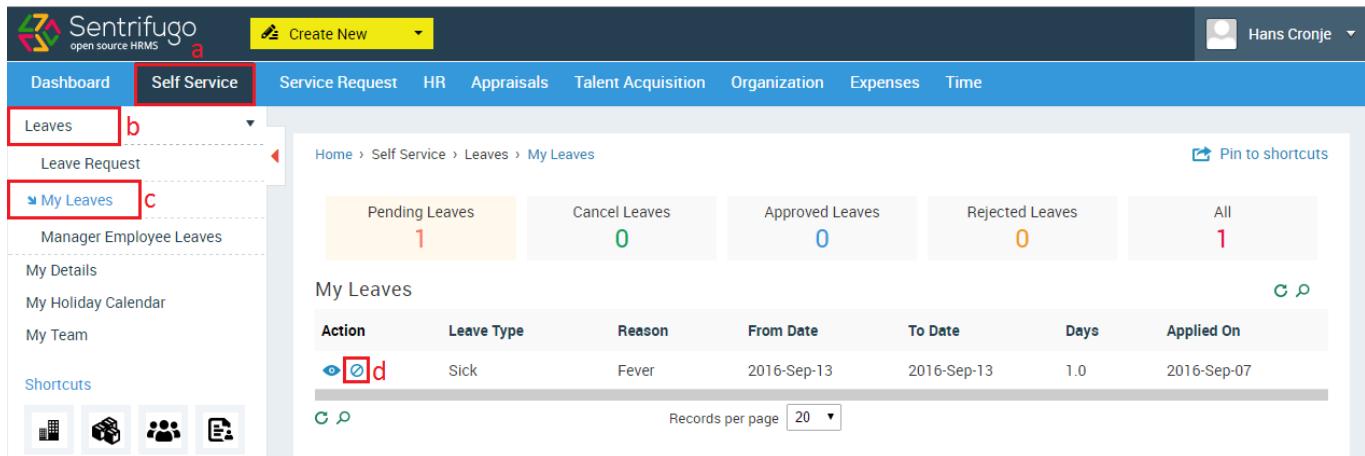
Figure 47

3.7 How do I cancel a Leave Request?

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

Employee

Please refer Figure 48



The screenshot shows the Sentrifugo self-service interface. The top navigation bar includes 'Create New' and a user profile for 'Hans Cronje'. The main menu has tabs for Dashboard, Self Service (which is selected and highlighted with a red box), Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. On the left, a sidebar menu under 'Leaves' has items for 'Leave Request' (highlighted with a red box 'a'), 'My Leaves' (highlighted with a red box 'c'), 'Manager Employee Leaves', 'My Details', 'My Holiday Calendar', 'My Team', and 'Shortcuts' (with icons for Home, Self Service, Leaves, Appraisals, Talent Acquisition, Organization, Expenses, and Time).

The central content area displays 'My Leaves' statistics: Pending Leaves (1), Cancel Leaves (0), Approved Leaves (0), Rejected Leaves (0), and All (1). Below this is a table with columns: Action, Leave Type, Reason, From Date, To Date, Days, and Applied On. A single row is shown: Action (with a red box 'd') is 'Sick', Leave Type is 'Fever', From Date is '2016-Sep-13', To Date is '2016-Sep-13', Days is '1.0', and Applied On is '2016-Sep-07'. At the bottom are 'Records per page' set to 20 and two search icons.

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

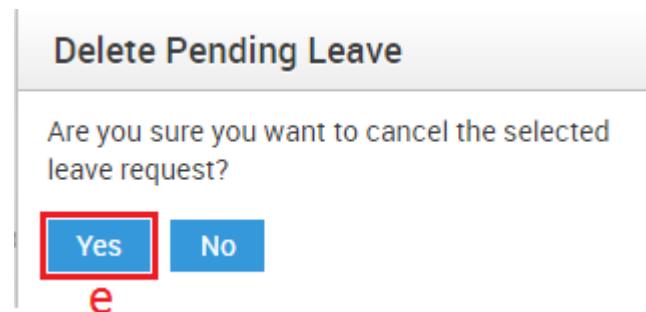


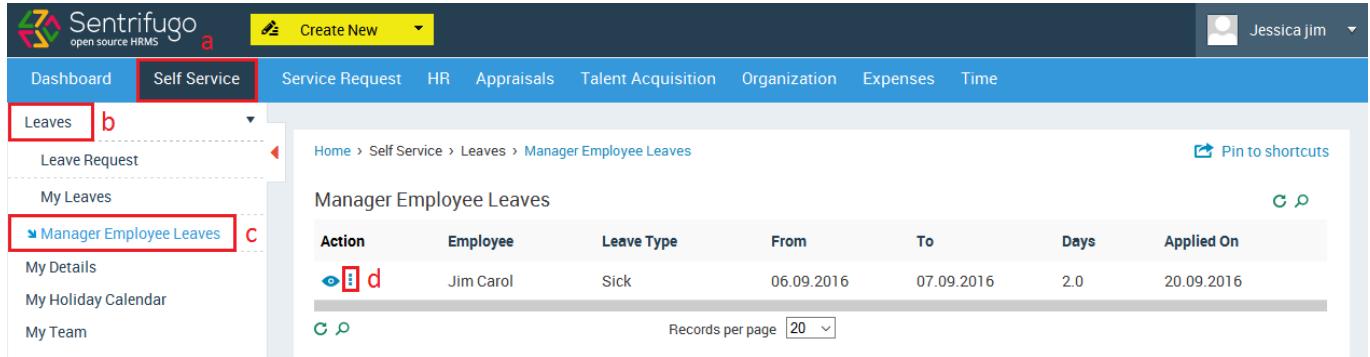
Figure 49

- 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



The screenshot shows the Sentrifugo HRMS application interface. At the top, there is a navigation bar with links for Dashboard, Self Service (which is highlighted with a red box), Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. A 'Create New' button is also present. On the right side, a user profile for 'Jessica jim' is shown.

The main content area has a left sidebar with categories: Leaves (highlighted with a red box), Leave Request, My Leaves, Manager Employee Leaves (highlighted with a red box and labeled 'c'), My Details, My Holiday Calendar, and My Team. The 'Manager Employee Leaves' section is currently active, as indicated by the bold text and the red box around it.

The main grid displays 'Manager Employee Leaves' with the following columns: Action, Employee, Leave Type, From, To, Days, and Applied On. One record is listed: Jim Carol, Sick, From 06.09.2016 to 07.09.2016, 2.0 days, and Applied On 20.09.2016. There are also 'More Action' and 'Edit' buttons next to the record.

At the bottom of the grid, there is a 'Records per page' dropdown set to 20.

Figure 50

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

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

Leaverequest

Status	e Cancel	Comments	
50 characters remaining (50 maximum)			
SAVE 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	

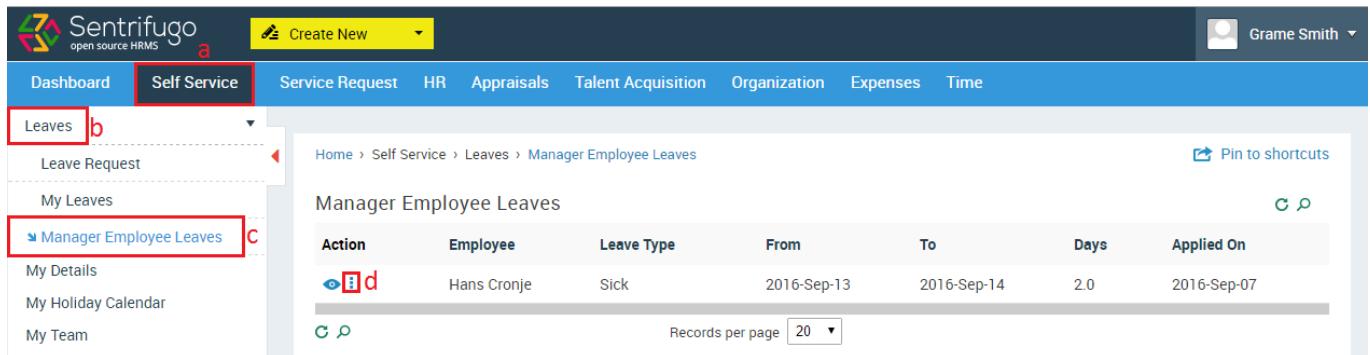
Figure 51

- 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 HRMS dashboard. The top navigation bar includes the logo, a 'Create New' button, and a user profile for 'Grame Smith'. The main menu has tabs for 'Dashboard', 'Self Service' (which is highlighted with a red box), 'Service Request', 'HR', 'Appraisals', 'Talent Acquisition', 'Organization', 'Expenses', and 'Time'. A sidebar on the left is titled 'Leaves' and contains links for 'Leave Request', 'My Leaves', and 'Manager Employee Leaves' (which is also highlighted with a red box). The main content area is titled 'Manager Employee Leaves' and displays a table of leave requests. One row is shown in detail:

Action	Employee	Leave Type	From	To	Days	Applied On
	Hans Cronje	Sick	2016-Sep-13	2016-Sep-14	2.0	2016-Sep-07

At the bottom of the table, there are buttons for 'New' and 'Print', and a dropdown for 'Records per page' set to 20.

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*

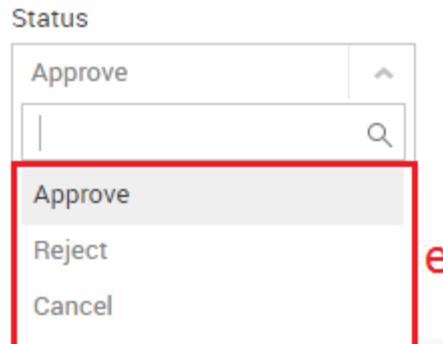


Figure 53

- 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

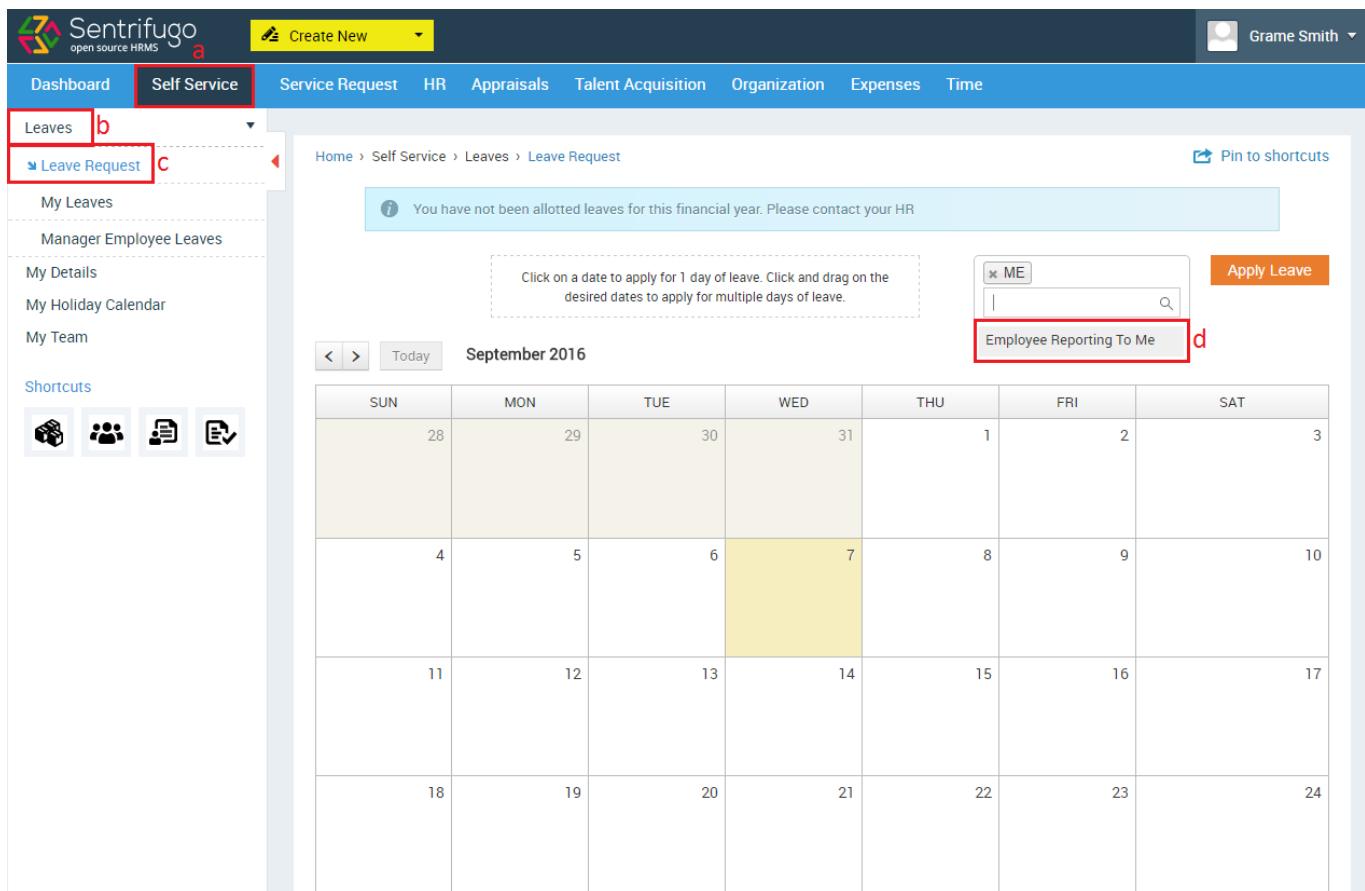


Figure 54

- a. Click **Self Service** in the top menu
- b. Click **Leaves** on the left menu panel
- c. Click **Leave Request** in the submenu
- d. 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
		Hans Cronje, Leave (A)				
		Click here				
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8



Leaverequest ×

Status	Comments																
<input style="width: 100%; height: 25px; border: none; background-color: #f0f0f0; padding: 2px;" type="button" value="Cancel"/>	<input style="width: 100%; height: 25px; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text"/> <small>50 characters remaining (50 maximum)</small>																
<input style="width: 100px; height: 25px; background-color: #0070C0; color: white; border: none; font-weight: bold; border-radius: 5px;" type="button" value="SAVE"/>																	
<table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <tr> <td style="width: 25%;">Employee</td> <td style="width: 25%;">Hans Cronje</td> <td style="width: 25%;">Leave Type</td> <td style="width: 25%;">Sick</td> </tr> <tr> <td>From</td> <td>2016-09-13</td> <td>To</td> <td>2016-09-14</td> </tr> <tr> <td>Leave For</td> <td>Full Day</td> <td>Days</td> <td>2.0</td> </tr> <tr> <td>Approved On</td> <td>2016-Sep-07</td> <td>Comments</td> <td></td> </tr> </table>		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	
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

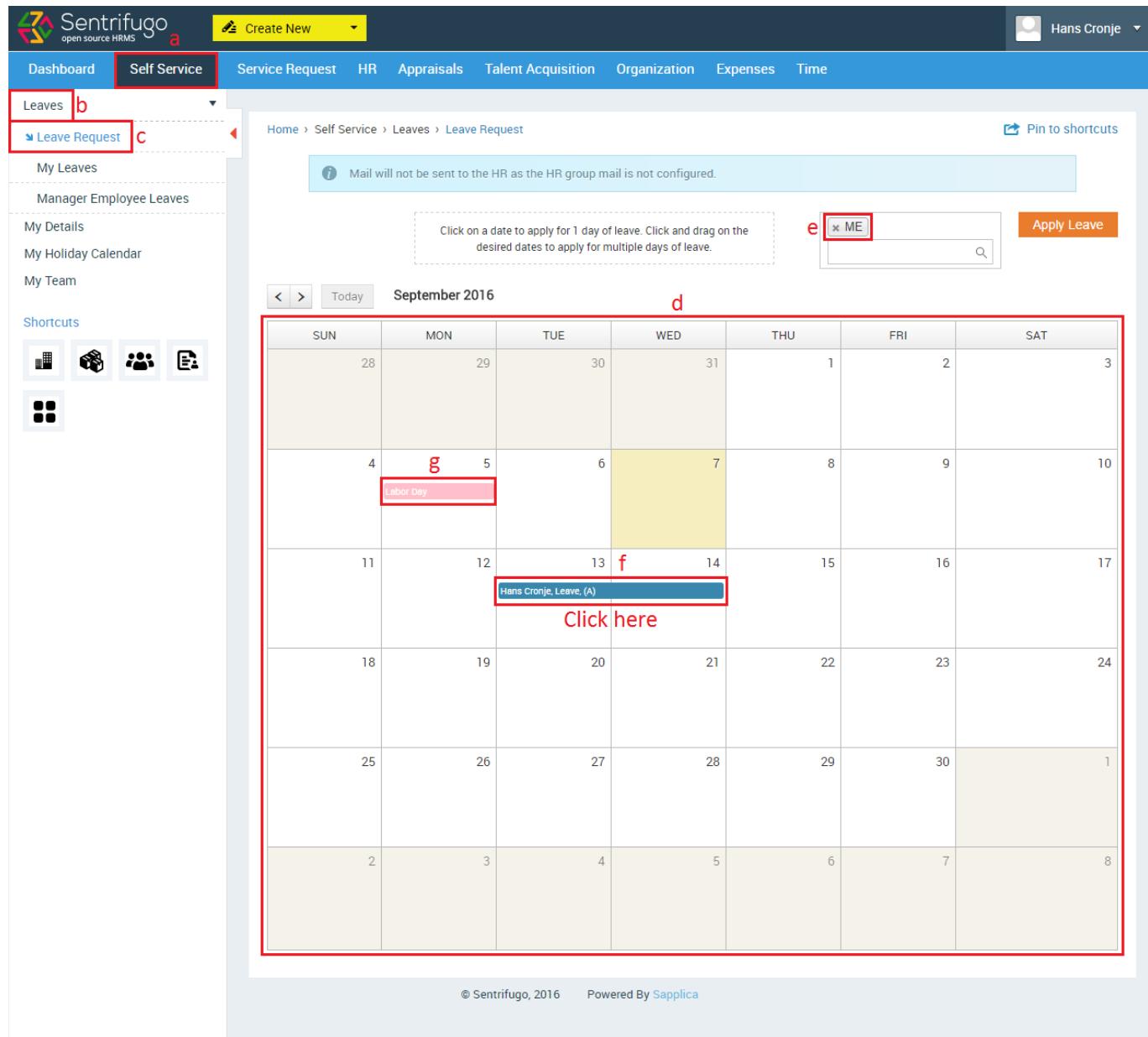


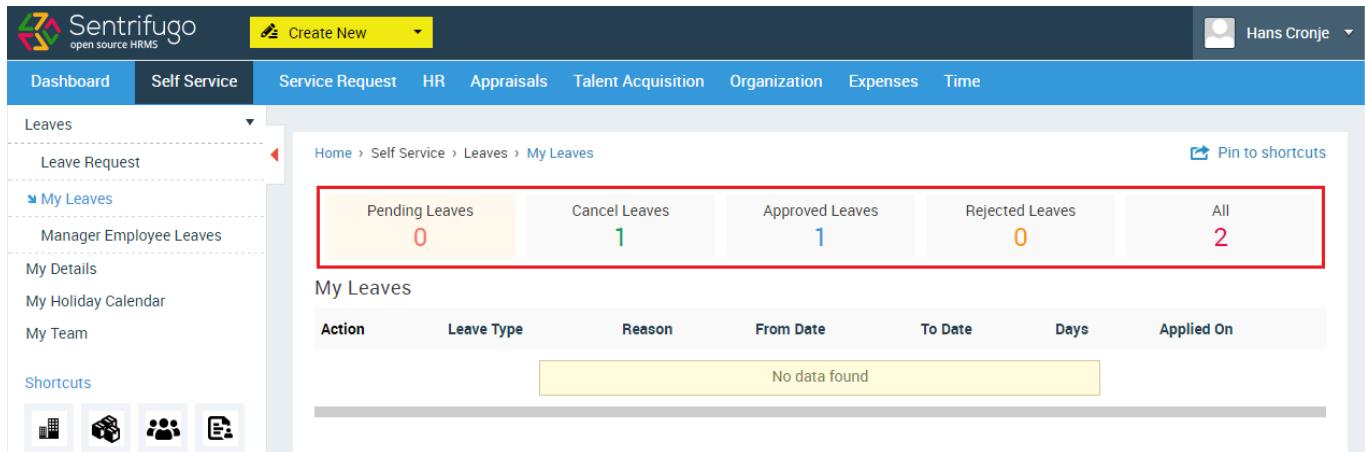
Figure 56

- 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

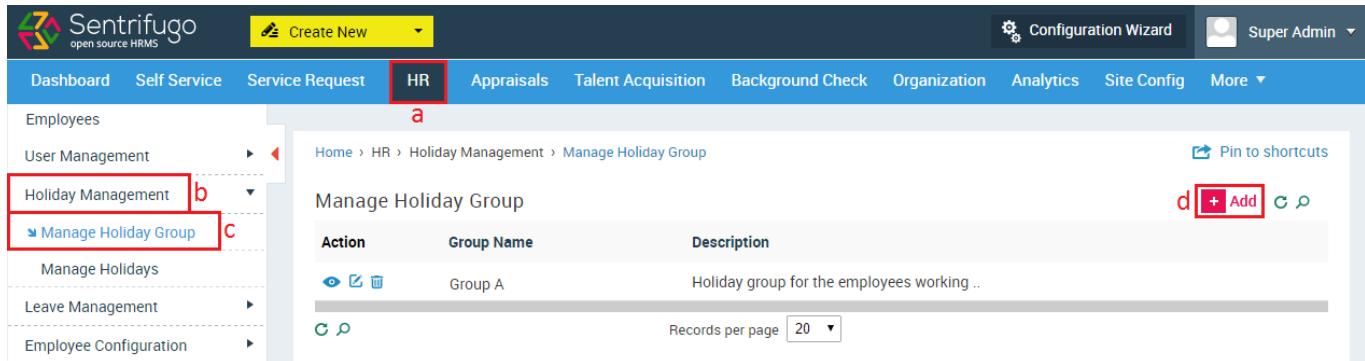
Figure 57

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



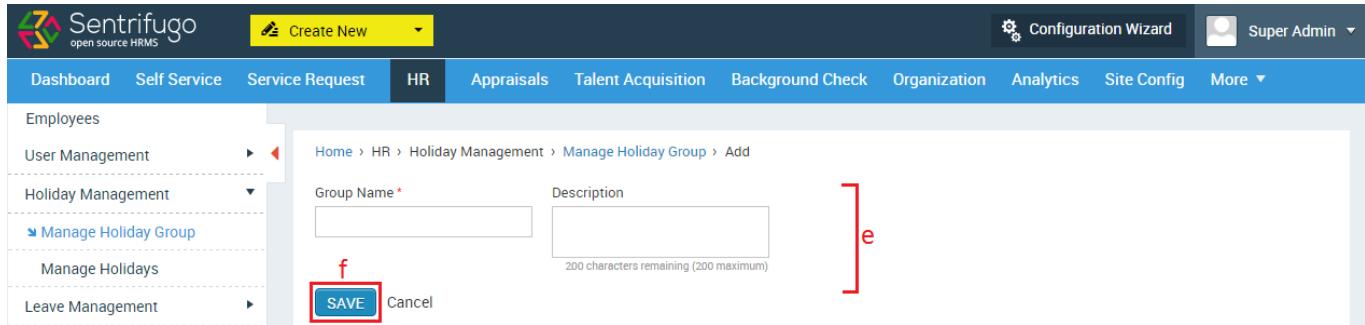
Action	Group Name	Description
	Group A	Holiday group for the employees working ...

Figure 58

- a. Click **HR** in the top menu
- b. Click **Holiday Management** on the left menu panel

- c. Click **Manage Holiday Group** in the submenu
- d. Click **+Add** button

Please refer Figure 59



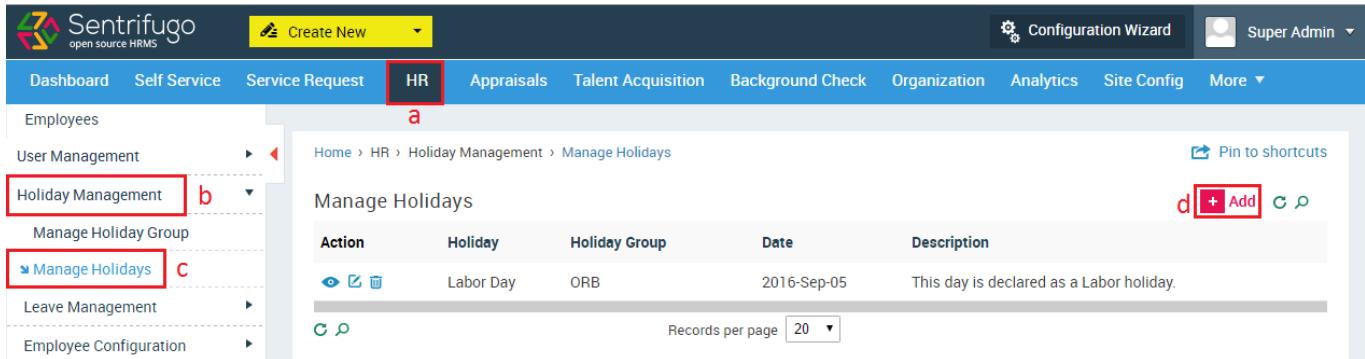
The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has tabs for Dashboard, Self Service, Service Request, HR (which is selected), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar menu lists Employees, User Management, Holiday Management (selected), Manage Holiday Group (highlighted with a red box 'e'), Manage Holidays, and Leave Management. The central content area shows the 'Manage Holiday Group' page with fields for 'Group Name' and 'Description', both of which have red boxes around them. A '200 characters remaining (200 maximum)' note is below the 'Description' field. At the bottom are 'SAVE' and 'Cancel' buttons, with the 'SAVE' button highlighted by a red box 'f'.

Figure 59

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

3.12 How do I create Holidays?

Please refer Figure 60

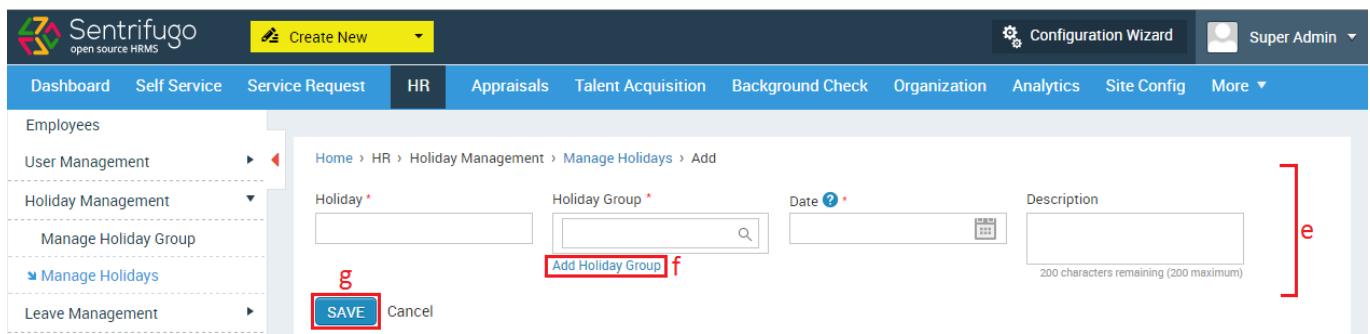


The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has tabs for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar menu lists Employees, User Management, Holiday Management (selected), Manage Holiday Group, Manage Holidays (highlighted with a red box 'c'), Leave Management, and Employee Configuration. The central content area shows the 'Manage Holidays' page with a table listing a single holiday entry: Labor Day, ORB, 2016-Sep-05, and a description. The table has columns for Action, Holiday, Holiday Group, Date, and Description. In the top right, there are buttons for Pin to shortcuts, + Add (highlighted with a red box 'd'), and search/filter icons. A note at the bottom says 'Records per page 20'.

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 HR module's 'Manage Holidays' section. The top navigation bar has 'HR' selected. On the left, there's a sidebar with 'Employees' and 'User Management' sections. The main content area shows a form for adding a new holiday. It has fields for 'Holiday' (text input), 'Holiday Group' (dropdown with an 'Add Holiday Group' link highlighted by a red box 'f'), 'Date' (date picker with a red box 'g'), and 'Description' (text area with a note '200 characters remaining (200 maximum)'). Below the form are 'SAVE' and 'Cancel' buttons.

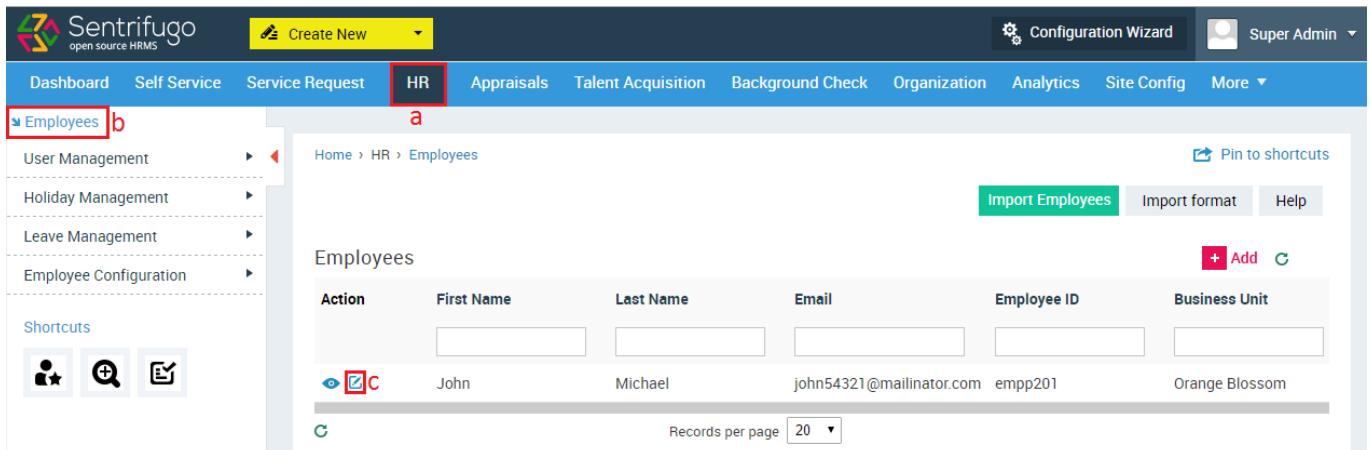
Figure 61

- 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

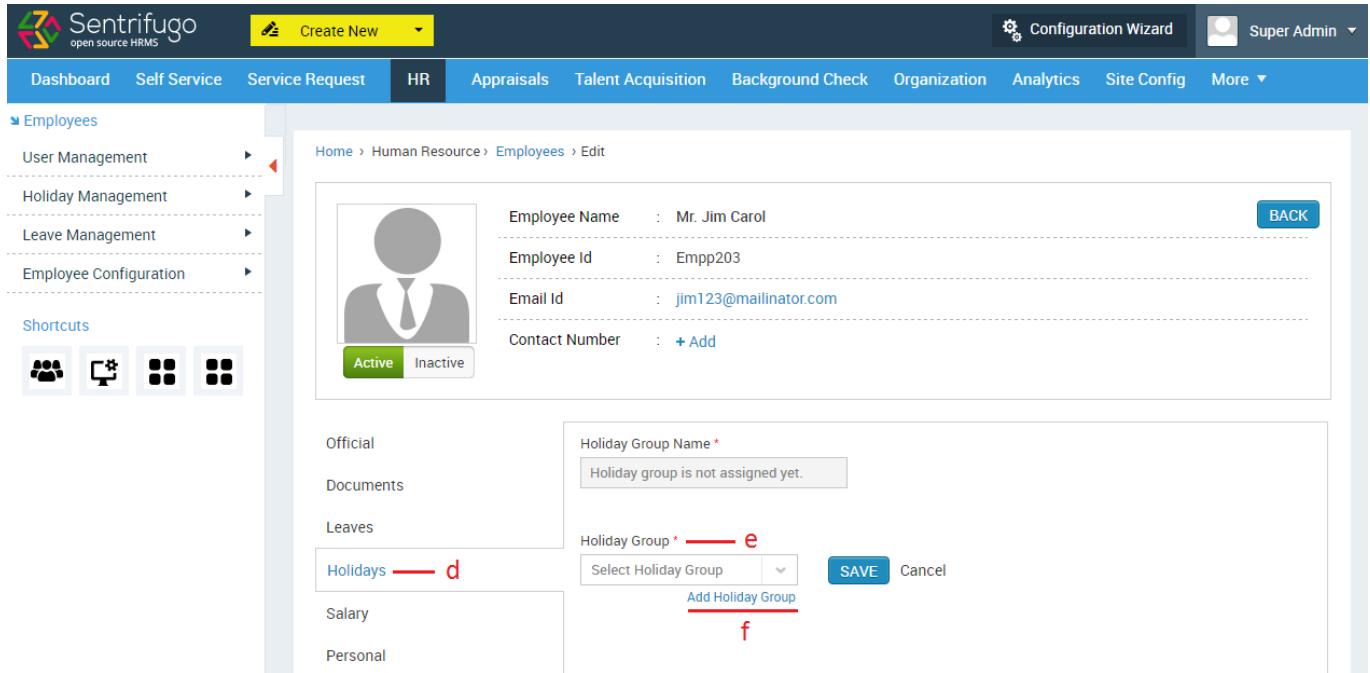


The screenshot shows the HR module's 'Employees' list view. The top navigation bar has 'HR' selected. The left sidebar has 'Employees' (highlighted by a red box 'b') and 'User Management' sections. The main area displays a table of employees with columns: Action, First Name, Last Name, Email, Employee ID, and Business Unit. One row is selected, shown with a red box 'c' on the edit icon. At the top right, there are buttons for 'Import Employees', 'Import format', and 'Help'. The table shows data for an employee named John Michael with email john54321@mailinator.com, Employee ID empp201, and Business Unit Orange Blossom. There are also icons for pinning to shortcuts and adding new employees.

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

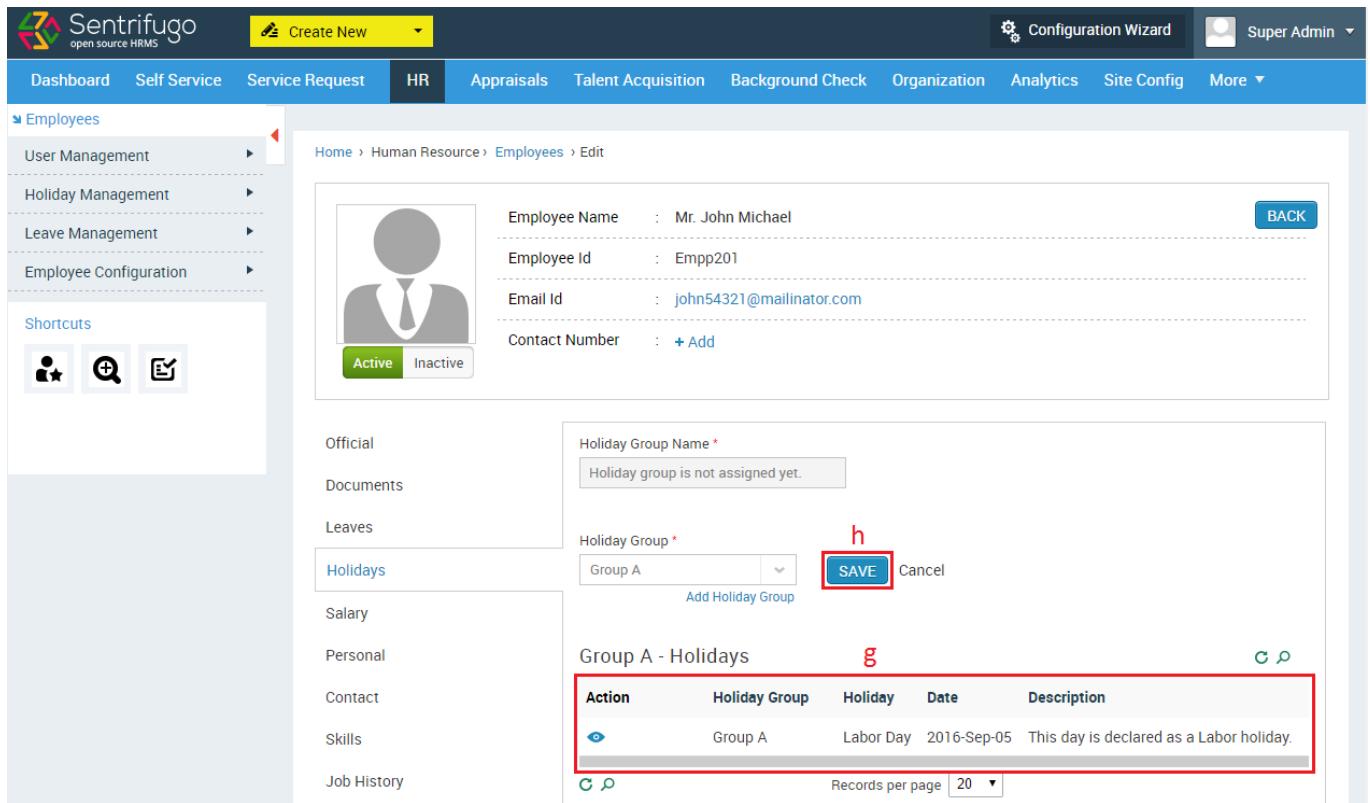
Holiday Group Name *
 Holiday group is not assigned yet.

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. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (which is currently selected), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the far right, there are links for Configuration Wizard, Super Admin, and a user icon.

The main content area displays an employee profile for "Mr. John Michael" (Employee ID: Empp201). The profile includes fields for Email Id (john54321@mailinator.com) and Contact Number (+ Add). Below the profile, there is a sidebar titled "Shortcuts" with icons for User Management, Holiday Management, Leave Management, and Employee Configuration.

A modal window is open under the "Holidays" section of the sidebar. It asks for a "Holiday Group Name" (Group A) and has a "SAVE" button highlighted with a red box. The modal also contains a "Cancel" button and a note that the "Holiday group is not assigned yet."

Below the modal, a grid titled "Group A - Holidays" (highlighted with a green box) lists a single entry:

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

At the bottom of the grid, there are buttons for "Records per page" (set to 20) and "C P".

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

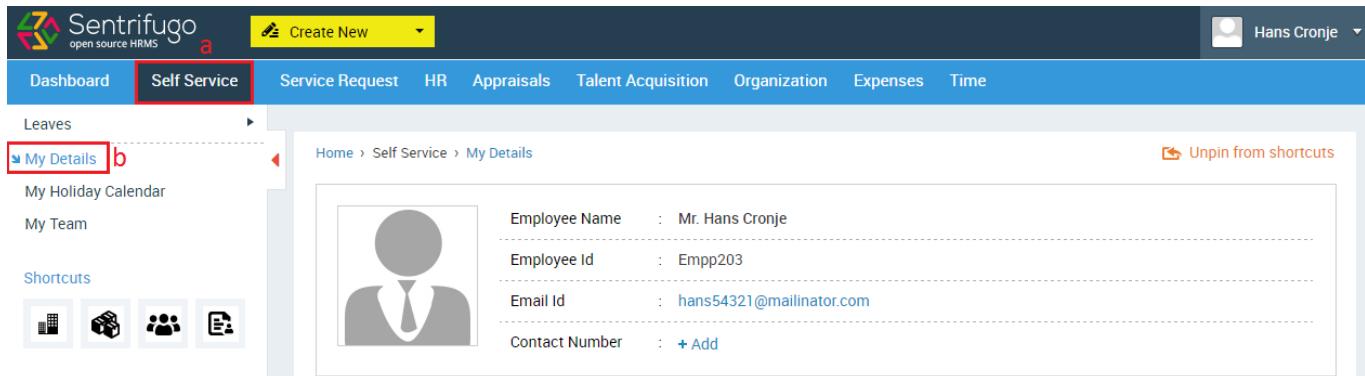


Figure 65 shows the Sentrifugo web interface. The top navigation bar includes the Sentrifugo logo, a 'Create New' button, and a user profile for 'Hans Cronje'. The main menu has tabs for Dashboard, Self Service (which is selected and highlighted with a red box), Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. On the left, a sidebar titled 'Leaves' shows 'My Details' (also highlighted with a red box) and other options like 'My Holiday Calendar' and 'My Team'. Below the sidebar are 'Shortcuts' with icons for Home, Search, and Help. The central content area shows the breadcrumb 'Home > Self Service > My Details'. It features a placeholder profile picture and a table with employee information:

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

Figure 65

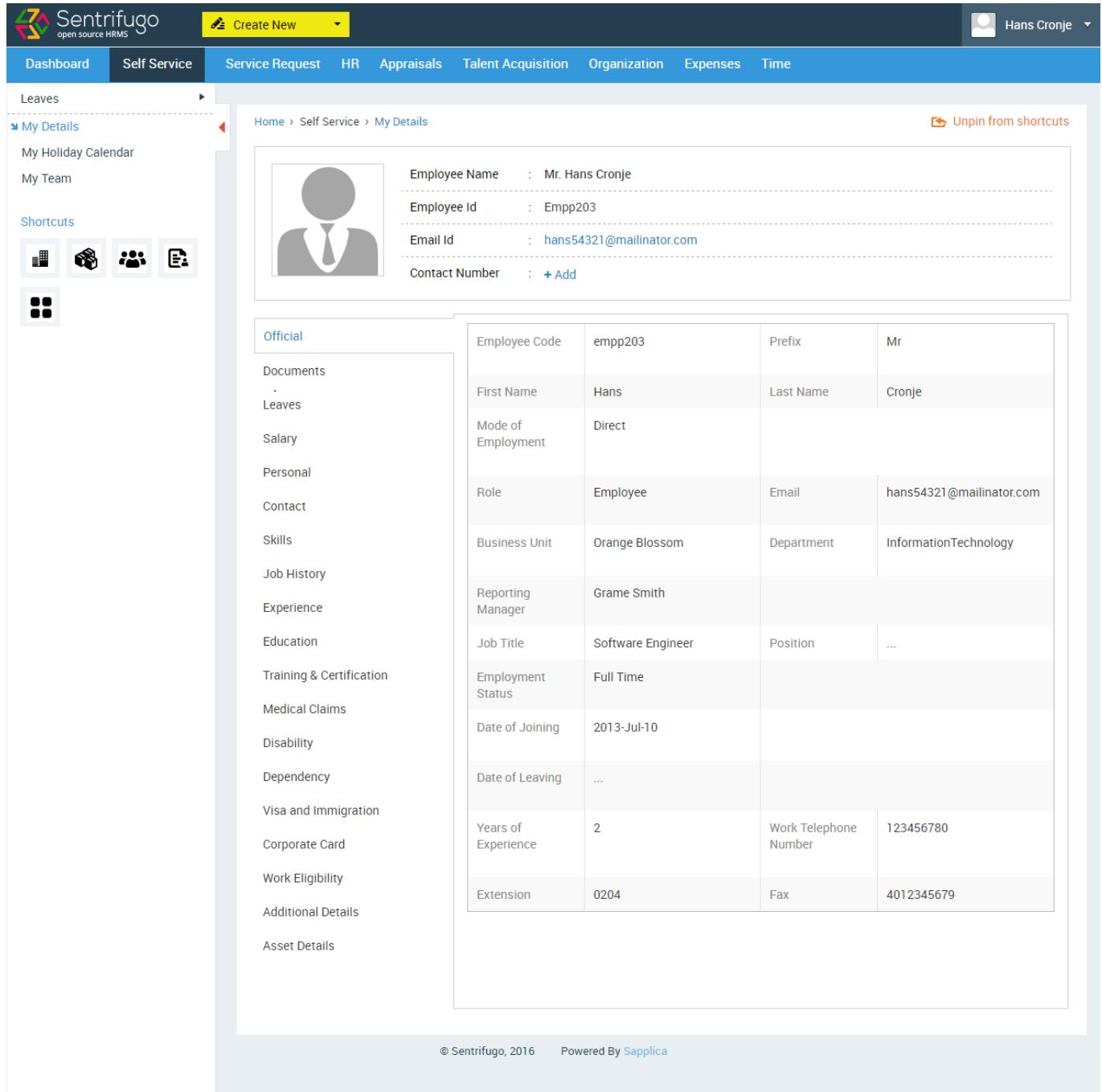
- Click **Self Service** in the top menu
- Click **My Details** on the left menu panel



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 open source HRMS application interface. The top navigation bar includes the logo, a 'Create New' button, and a user profile for 'Hans Cronje'. The main menu has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. The 'Self Service' tab is selected.

The left sidebar contains a 'Leaves' section with 'My Details' pinned, 'My Holiday Calendar', and 'My Team'. Below that is a 'Shortcuts' section with icons for Home, Employees, Departments, and Reports. A 'grid' icon is also present.

The central content area displays 'My Details' under 'Self Service'. 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

Below this is a large table titled 'Official' containing various personal and professional information:

	Employee Code	Prefix	
Official	empp203	Mr	
Documents			
Leaves	First Name	Hans	Last Name
Salary	Mode of Employment	Direct	
Personal	Role	Employee	Email
Contact	Business Unit	Orange Blossom	Department
Skills	Reporting Manager	Grame Smith	InformationTechnology
Job History	Job Title	Software Engineer	Position
Experience	Employment Status	Full Time	
Education	Date of Joining	2013-Jul-10	
Training & Certification	Date of Leaving	...	
Medical Claims	Years of Experience	2	Work Telephone Number
Disability	Extension	0204	Fax
Dependency			123456780
Visa and Immigration			4012345679
Corporate Card			
Work Eligibility			
Additional Details			
Asset Details			

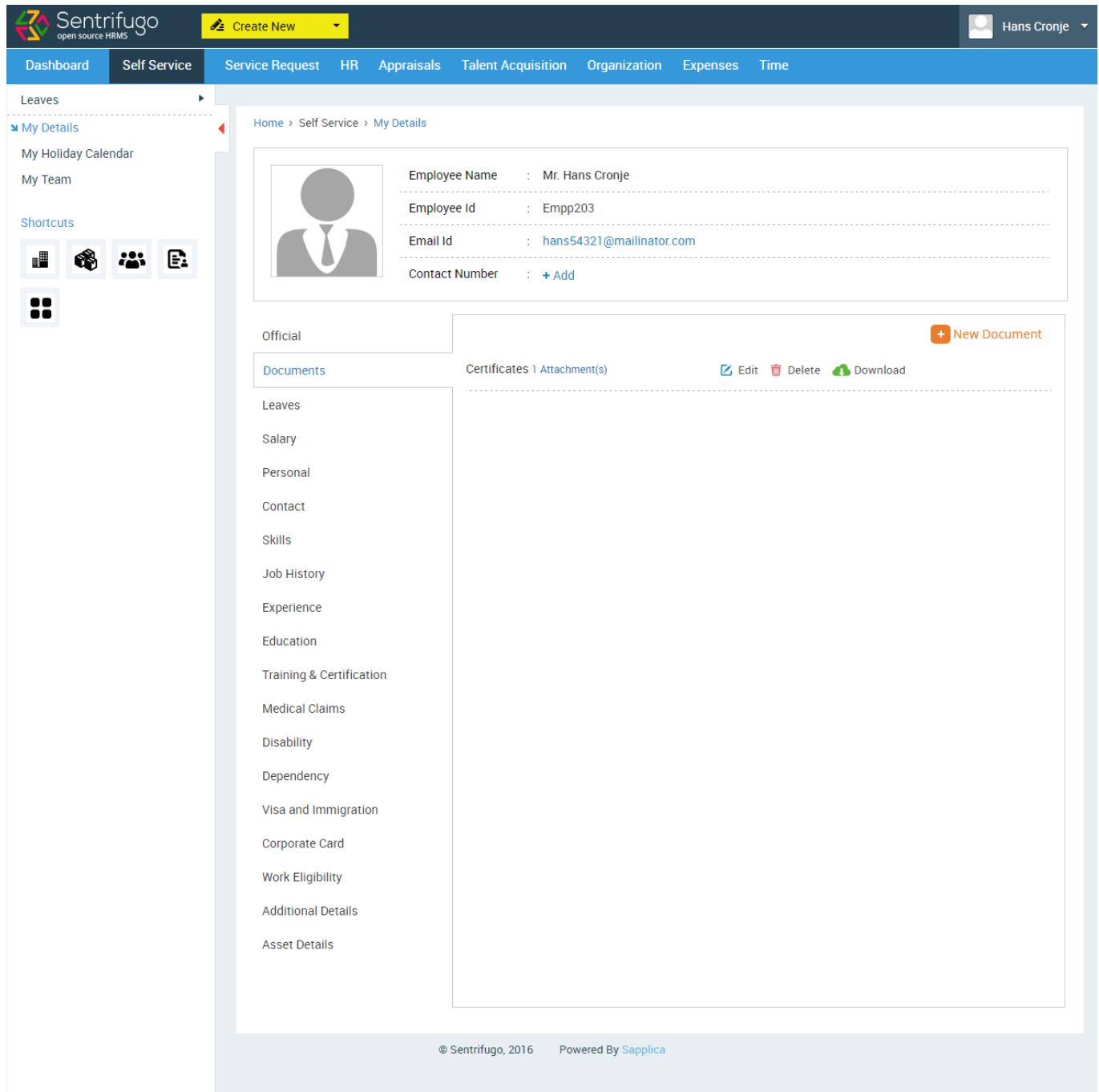
At the bottom of the page, there are copyright and powered-by links: © Sentrifugo, 2016 and Powered By Sapplica.

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 visible on the right.

The main content area is titled 'My Details'. It displays basic employee information: 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, which includes a list of 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. There is also a section for Certificates and Attachments, showing 1 Attachment(s).

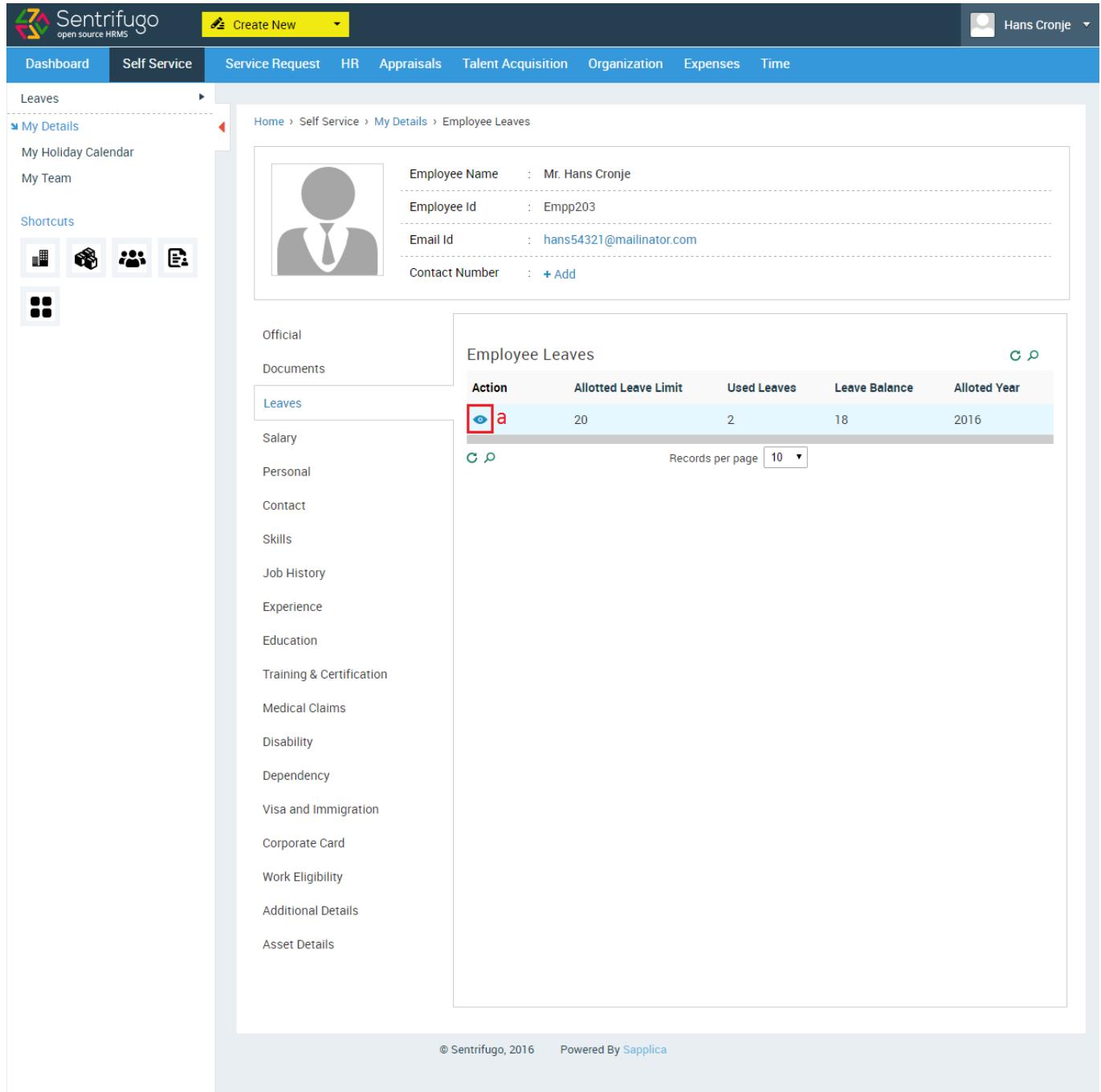
At the bottom of the page, there is a footer with copyright information: © Sentrifugo, 2016 and Powered By Sapplica.

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'. The main menu has tabs for Dashboard, Self Service (which is selected), Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time.

In the 'Self Service' section, a sidebar on the left lists 'My Details' (selected), 'My Holiday Calendar', 'My Team', and 'Shortcuts' (with icons for Home, Employees, and Documents). Below these are links for 'Official', 'Documents', and various personal details like 'Leaves' (selected), 'Salary', 'Personal', 'Contact', 'Skills', etc.

The main content area displays 'Employee Leaves' information for Mr. Hans Cronje, including his name, ID, email, and contact number. It also shows a summary table for 'Employee Leaves' with columns for Action, Allotted Leave Limit (20), Used Leaves (2), Leave Balance (18), and Allotted Year (2016). A red box highlights the 'Action' column header.

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

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

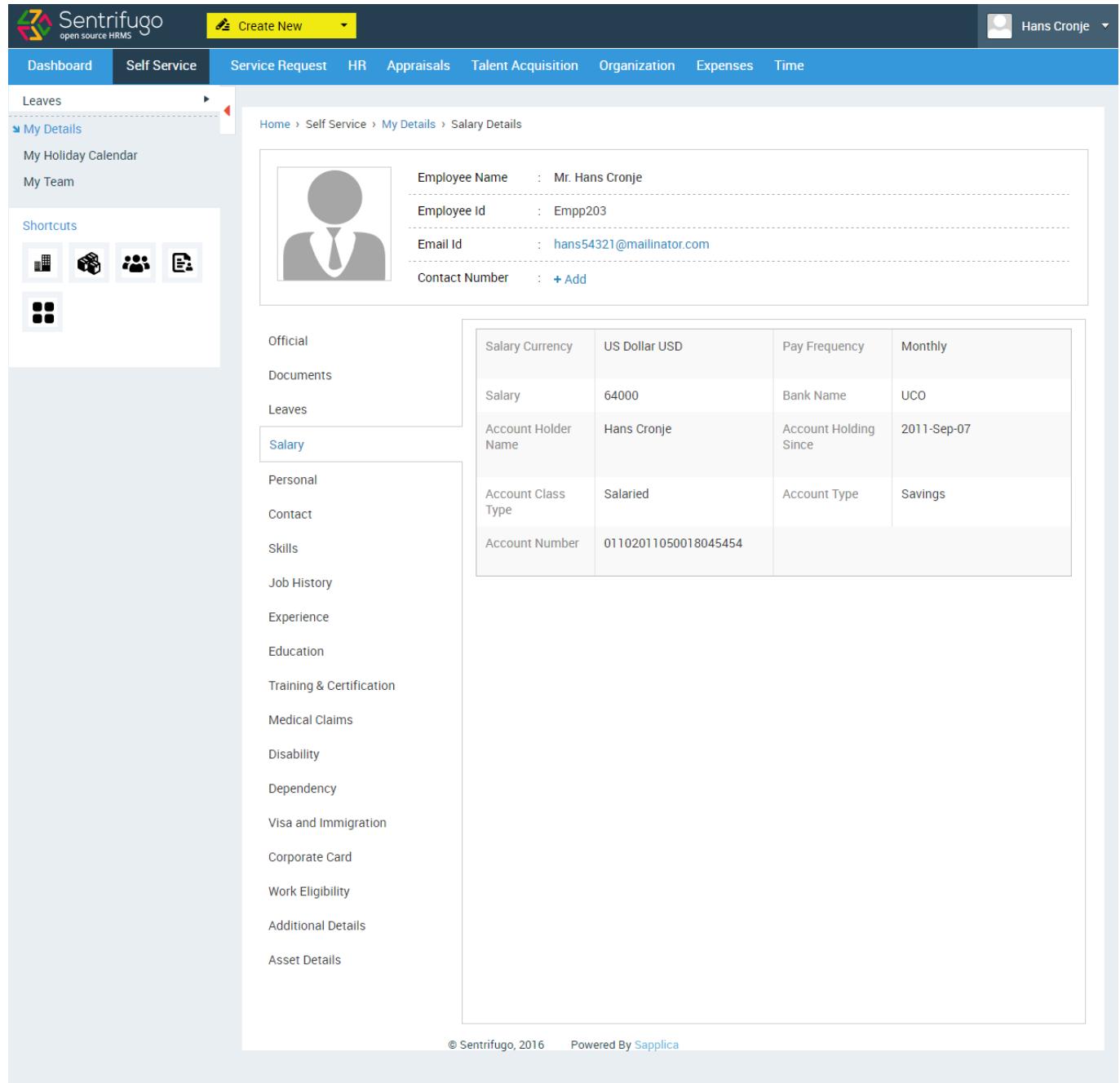
Figure 68

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 application interface. The top navigation bar includes the 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.

The left sidebar contains a 'Leaves' section with 'My Details', 'My Holiday Calendar', and 'My Team'. Below that is a 'Shortcuts' section with icons for Home, Employee, Team, and Logout.

The central content area shows the 'Salary Details' page for 'Hans Cronje'. It displays basic employee information: Employee Name (Mr. Hans Cronje), Employee Id (Empp203), Email Id (hans54321@mailinator.com), and Contact Number (+ Add). To the right is a table showing salary and account details:

Salary Currency	US Dollar USD	Pay Frequency	Monthly
Salary	64000	Bank Name	UCO
Account Holder Name	Hans Cronje	Account Holding Since	2011-Sep-07
Account Class Type	Salaried	Account Type	Savings
Account Number	01102011050018045454		

The sidebar also lists various other sections: Official, Documents, Leaves, Salary (selected), Personal, Contact, Skills, Job History, Experience, Education, Training & Certification, Medical Claims, Disability, Dependency, Visa and Immigration, Corporate Card, Work Eligibility, Additional Details, and Asset Details.

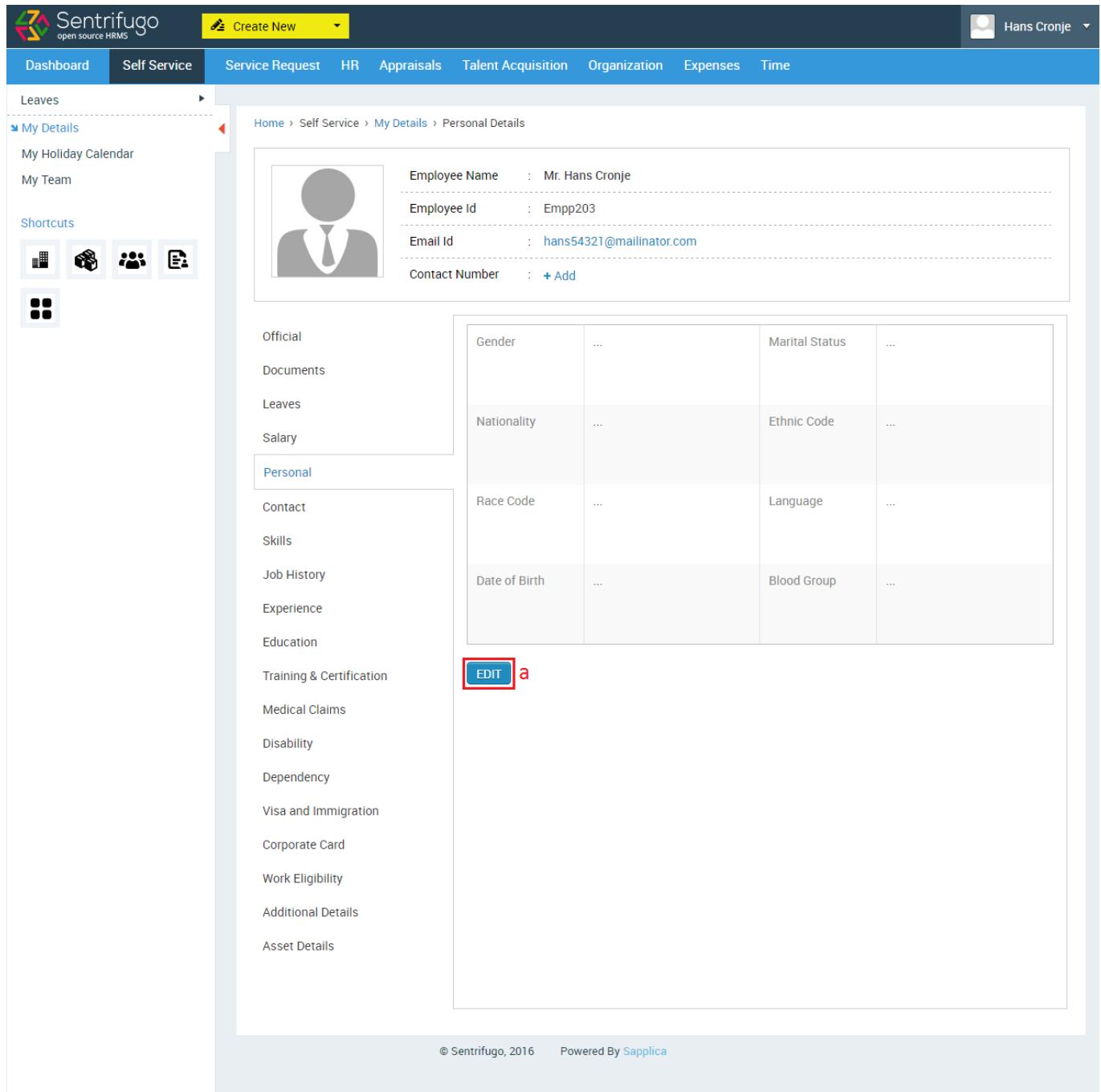
At the bottom of the page, there are copyright and power credits: © Sentrifugo, 2016 and Powered By Sapplica.

Figure 69

You can view your salary and account details.

Personal

Please refer Figure 70



The screenshot shows the Sentrifugo open source HRMS application interface. The top navigation bar includes the logo, a 'Create New' button, and a user profile for 'Hans Cronje'. The main menu bar has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. A left sidebar contains links for Leaves, My Details (selected), My Holiday Calendar, My Team, and Shortcuts (with icons for Home, Employees, and Reports). The main content area displays the 'Personal Details' section for an employee named Mr. Hans Cronje. It shows basic information: Employee Name (Mr. Hans Cronje), Employee Id (Emplp203), Email Id (hans54321@mailinator.com), and Contact Number (+ Add). Below this is a grid of personal details: Gender, Marital Status, Nationality, Ethnic Code, Race Code, Language, Date of Birth, and Blood Group. An 'EDIT' button is highlighted with a red box and labeled 'a'. A legend at the bottom indicates that 'a' corresponds to the 'Edit icon'.

Figure 70

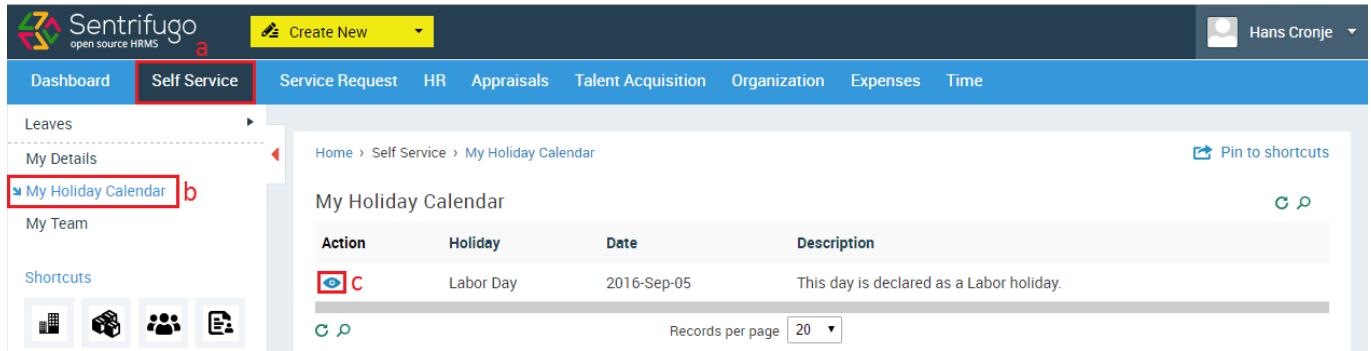
- Click **Edit icon** to add or modify any details

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 application interface. The top navigation bar includes the logo, a 'Create New' button, and a user profile for 'Hans Cronje'. 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. On the left, a sidebar shows 'Leaves' with 'My Details' and 'My Holiday Calendar' (also highlighted with a red box). Under 'Shortcuts', there are icons for Home, Self Service, My Team, and My Holiday Calendar. The central content area displays the 'My Holiday Calendar' page with a table:

Action	Holiday	Date	Description
	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). A 'Pin to shortcuts' link is in the top right.

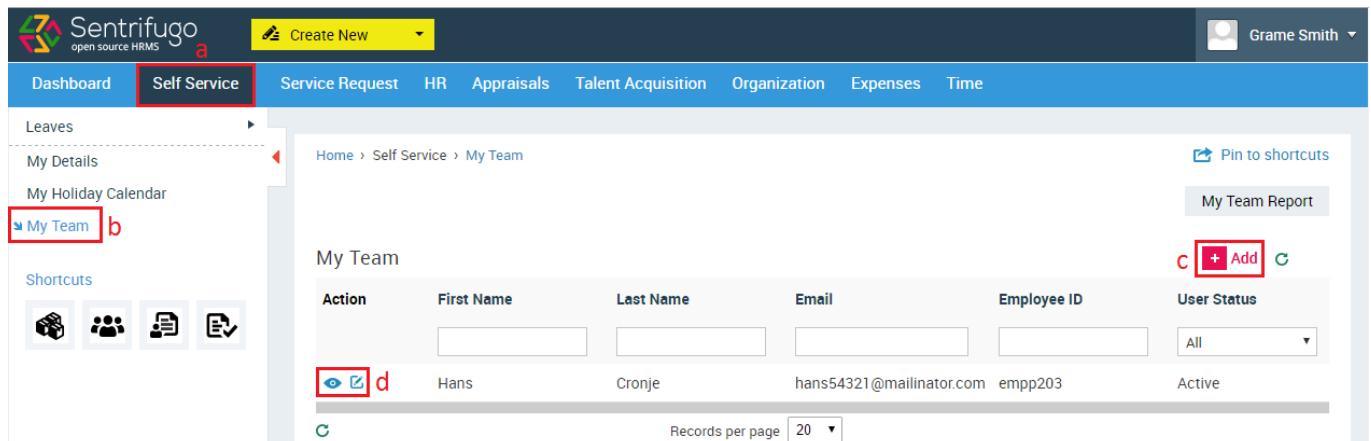
Figure 71

- 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 application interface. The top navigation bar includes the logo, a 'Create New' button, and a user profile for 'Grame Smith'. The main menu has tabs for Dashboard, Self Service (highlighted with a red box), Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. On the left, a sidebar shows 'Leaves' with 'My Details', 'My Holiday Calendar', and 'My Team' (highlighted with a red box). Under 'Shortcuts', there are icons for Home, Self Service, My Team, and My Holiday Calendar. The central content area displays the 'My Team' page with a table:

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

Below the table are buttons for 'Records per page' (set to 20) and 'C P' (refresh). A 'My Team Report' link is in the top right. A red box highlights the '+ Add' button in the top right corner of the table header.

Figure 72

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

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

Or

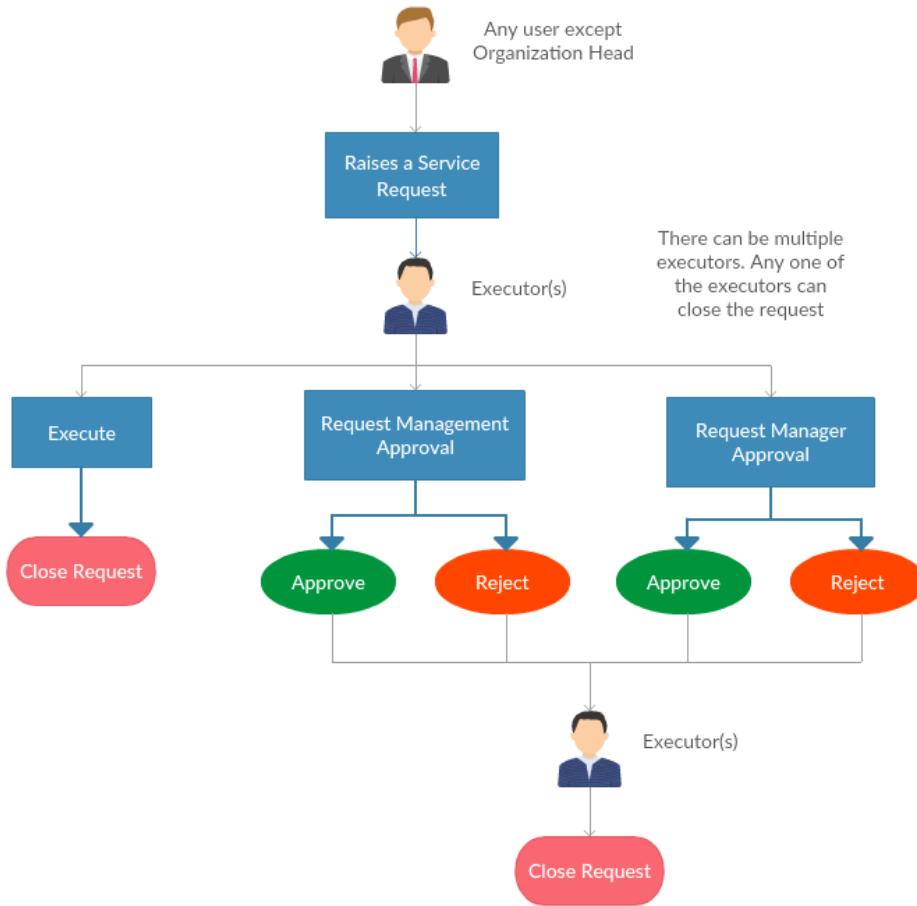
- d. Click **View/Edit** icon to view or edit employee details



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

5. Service Request

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

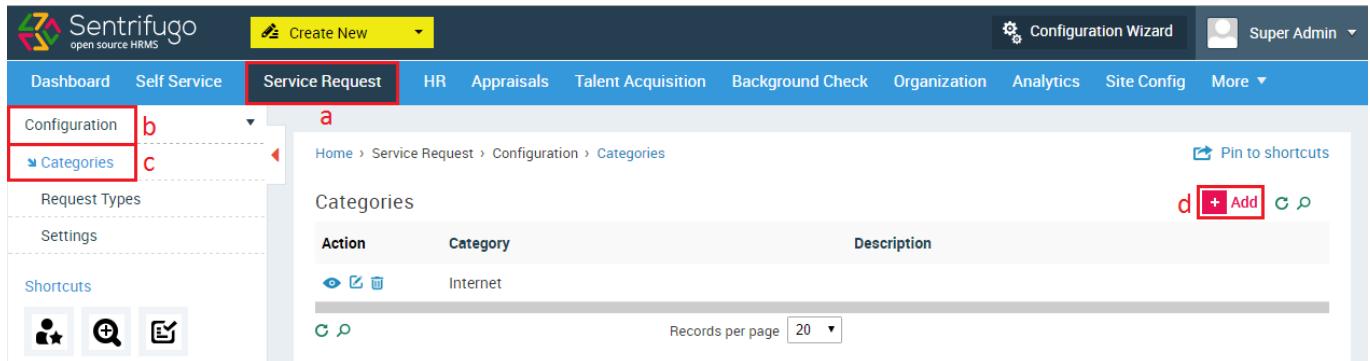


Description:

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

5.1 How do I create Service Request Categories?

Please refer Figure 73

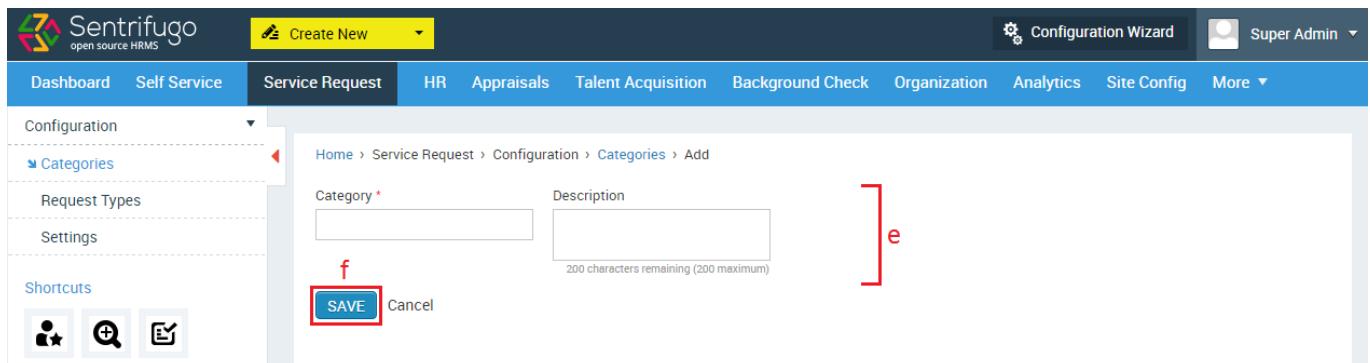


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes the logo, 'Create New' button, 'Configuration Wizard', and 'Super Admin'. The main menu has tabs for Dashboard, Self Service, Service Request (which is highlighted), HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. A left sidebar has sections for Configuration (with 'Categories' selected) and Request Types, along with icons for User, Search, and Export. The main content area shows a table titled 'Categories' with columns for Action, Category, and Description. One row is listed: 'Internet'. Below the table are 'Records per page' dropdown and search/filter icons. Red callout labels are present: 'a' points to the 'Service Request' tab; 'b' points to the 'Configuration' section in the sidebar; 'c' points to the 'Categories' link in the sidebar; and 'd' points to the '+ Add' button in the top right of the main content area.

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



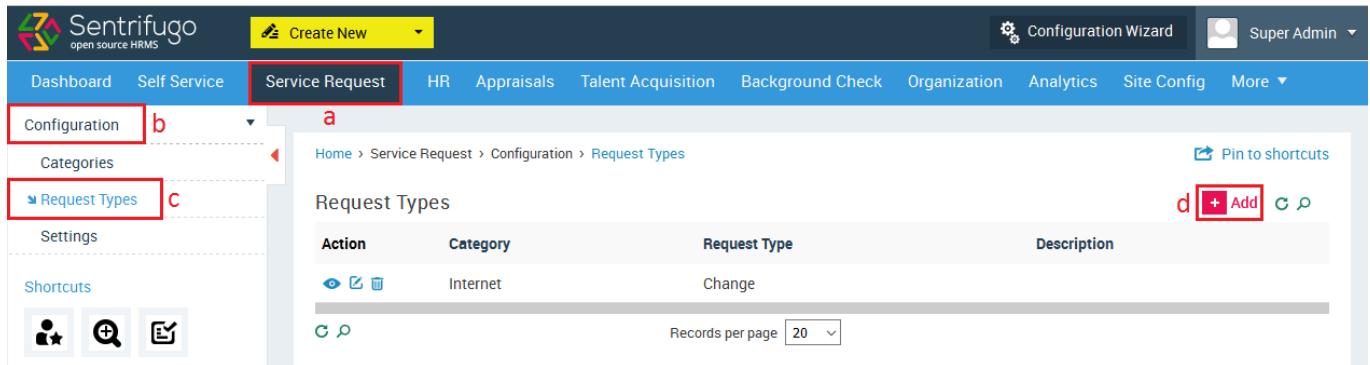
The screenshot shows the 'Add Category' form. The top navigation bar and main menu are identical to Figure 73. The left sidebar shows 'Configuration' and 'Categories'. The main content area has a breadcrumb path: Home > Service Request > Configuration > Categories > Add. It contains two input fields: 'Category *' and 'Description', with a note '200 characters remaining (200 maximum)'. At the bottom are 'SAVE' and 'Cancel' buttons. A red bracket 'e' groups the 'Category *' and 'Description' fields, and a red callout 'f' points 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



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has items like Dashboard, Self Service, Service Request (highlighted with a red box 'a'), HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar has 'Configuration' (highlighted with a red box 'b'), 'Categories', 'Request Types' (highlighted with a red box 'c'), and 'Settings'. Below the sidebar are 'Shortcuts' with icons for users, search, and export. The central content area shows 'Request Types' with a table:

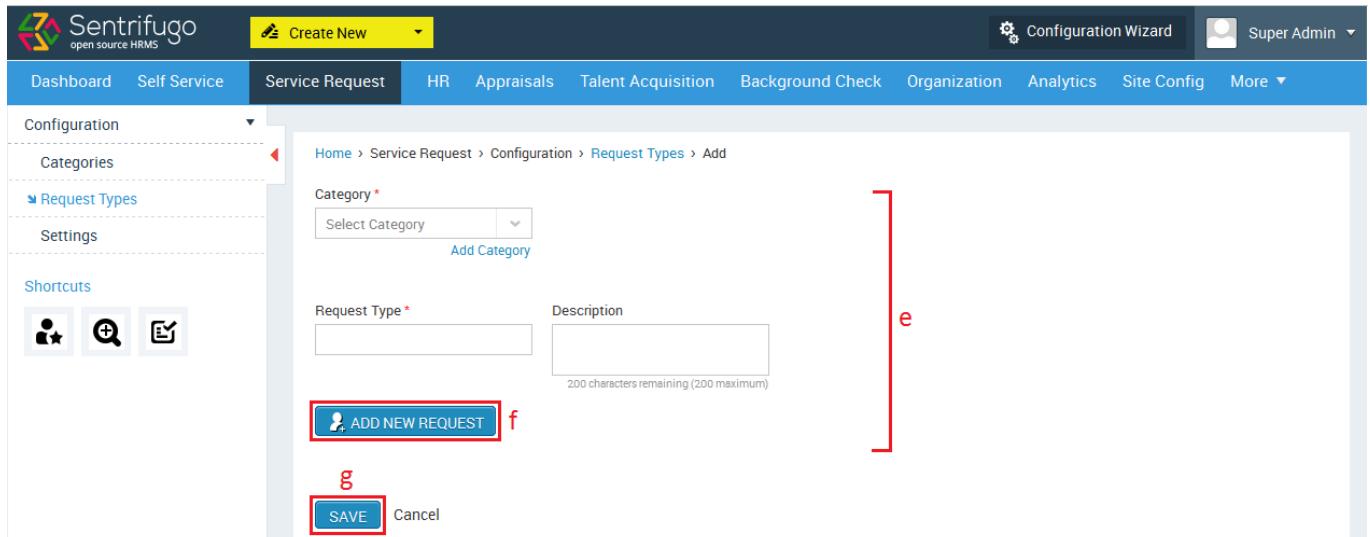
Action	Category	Request Type	Description
	Internet	Change	

Buttons at the bottom include 'Records per page' (set to 20), a search icon, and a refresh icon. A 'Pin to shortcuts' link is in the top right.

Figure 75

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

Please refer Figure 76



The screenshot shows the 'Add Request Type' form. The top navigation bar and main menu are the same as Figure 75. The left sidebar shows 'Configuration' (highlighted with a red box 'e'), 'Categories', 'Request Types' (highlighted with a red box 'f'), and 'Settings'. The central form fields include:

- Category ***: A dropdown menu labeled 'Select Category' with an 'Add Category' link.
- Request Type ***: An input field.
- Description**: A text area with a character limit of 200 (200 maximum).

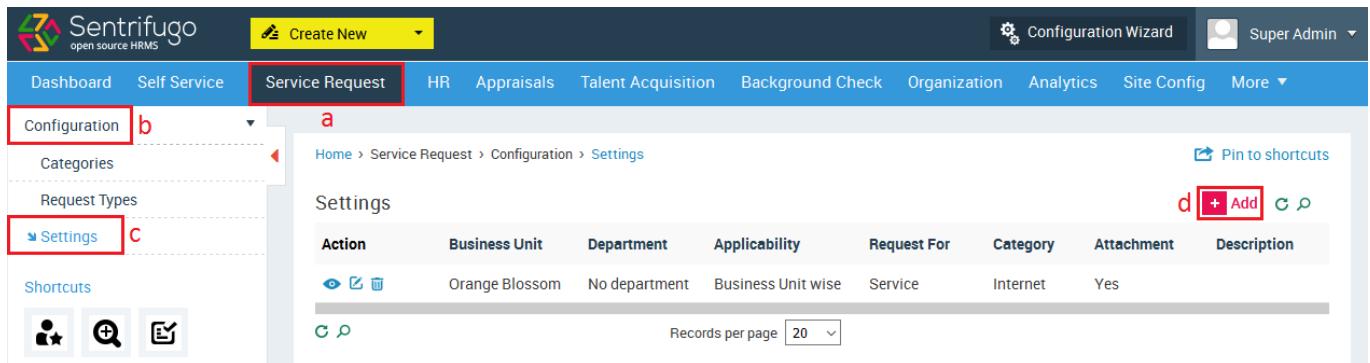
At the bottom are two buttons: a blue 'ADD NEW REQUEST' button (highlighted with a red box 'g') and a 'Cancel' link.

Figure 76

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

5.3 How do I configure Service Request settings?

Please refer Figure 77



Action	Business Unit	Department	Applicability	Request For	Category	Attachment	Description
	Orange Blossom	No department	Business Unit wise	Service	Internet	Yes	

Figure 77

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

Please refer Figure 78

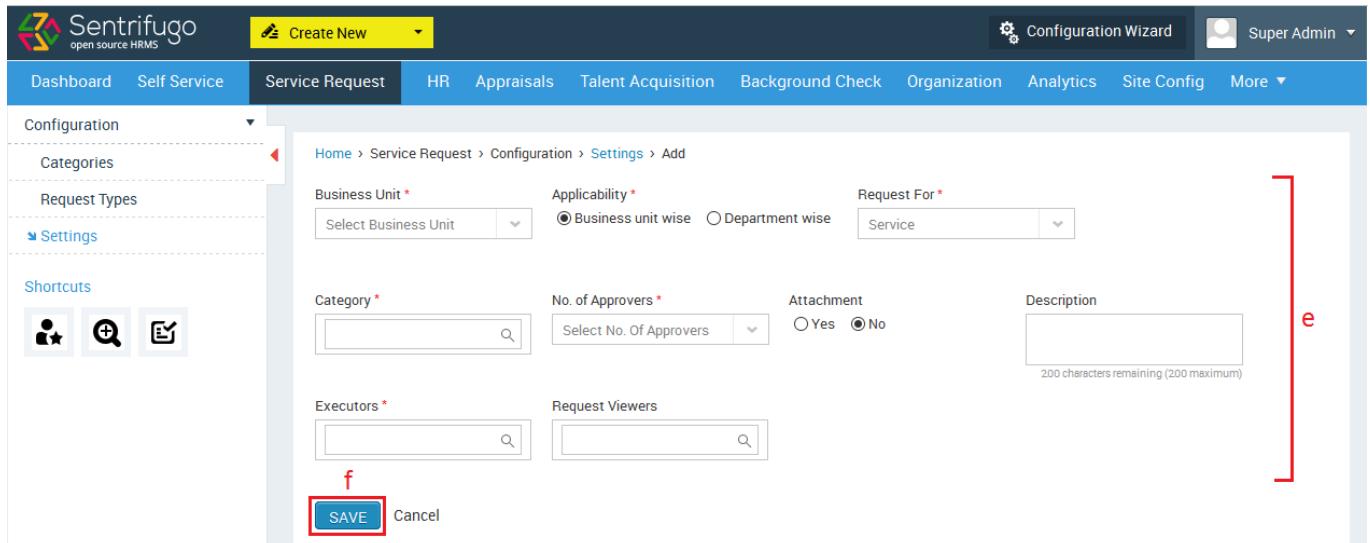


Figure 78

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

5.4 Who are Approvers, Executors and Viewers?

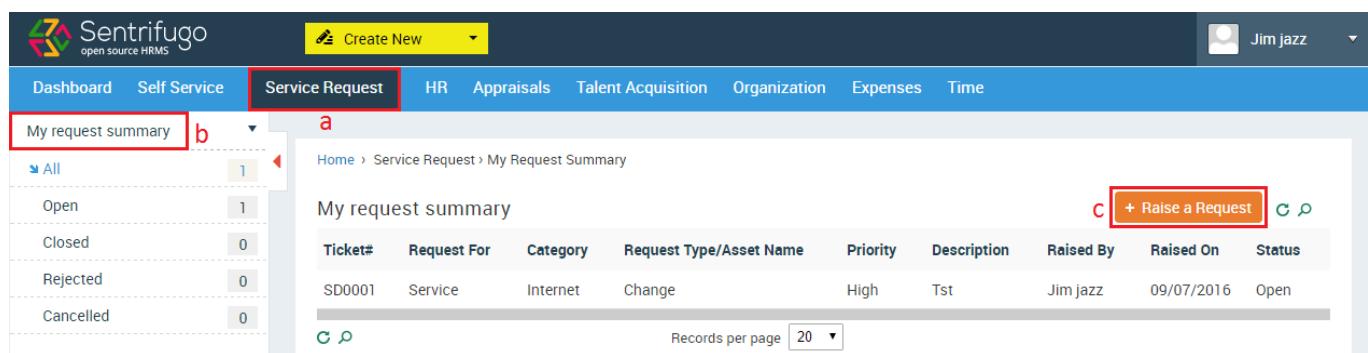
Approvers *Management*: They are responsible for providing approval for service requests. Executor(s) send a request for approval to the Approver(s). You can have a maximum of 3 approvers and a minimum of 1 approver.

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

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

5.5 How do I raise a Service Request?

Please refer Figure 79



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 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

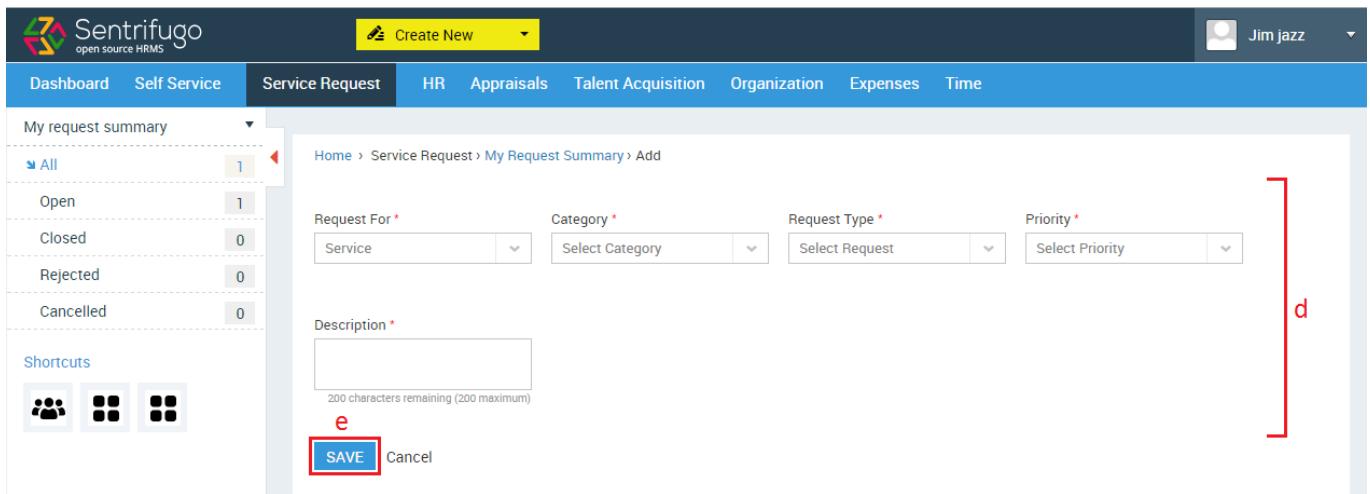
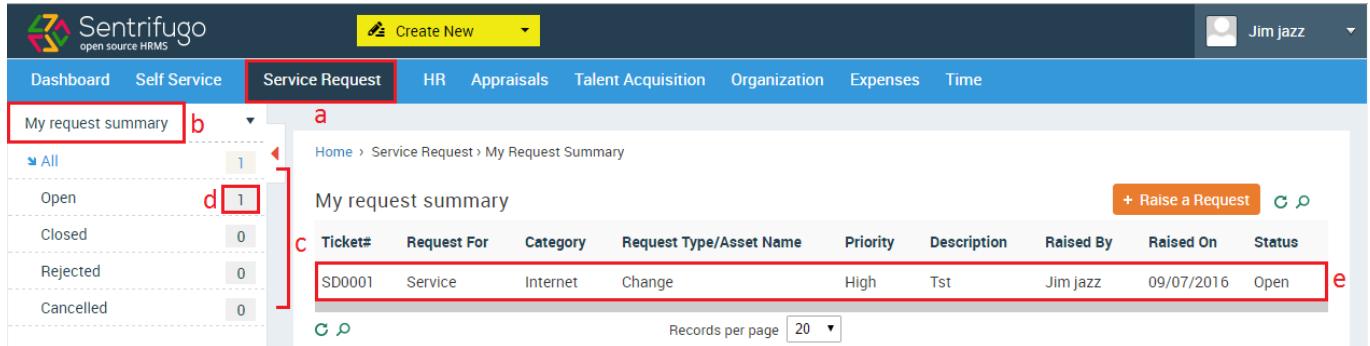


Figure 80

- 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

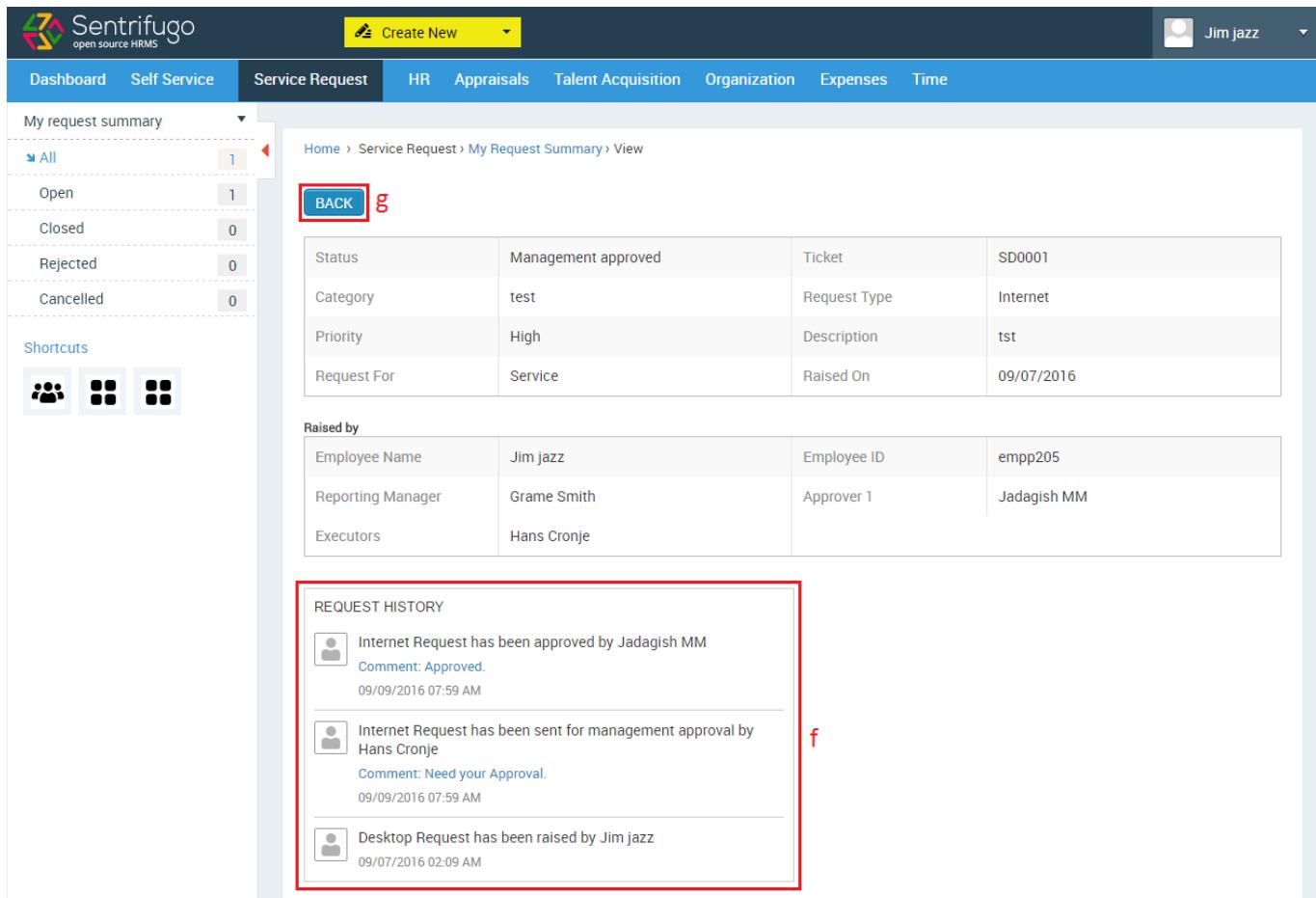
- a. Click **Service Request** in the top menu
- b. Click **My request summary** on the left menu panel

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. On the left, there's a sidebar with 'My request summary' showing 1 open ticket. Below it are 'Shortcuts' with icons for users, reports, and dashboards. The main area shows a ticket detail for 'SD0001'. The ticket information includes:

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

Below this is a 'Raised by' section:

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

A red box labeled 'f' highlights the 'REQUEST HISTORY' section, which contains three 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

A red box labeled 'g' highlights the 'BACK' button in the top-left corner of the ticket detail view.

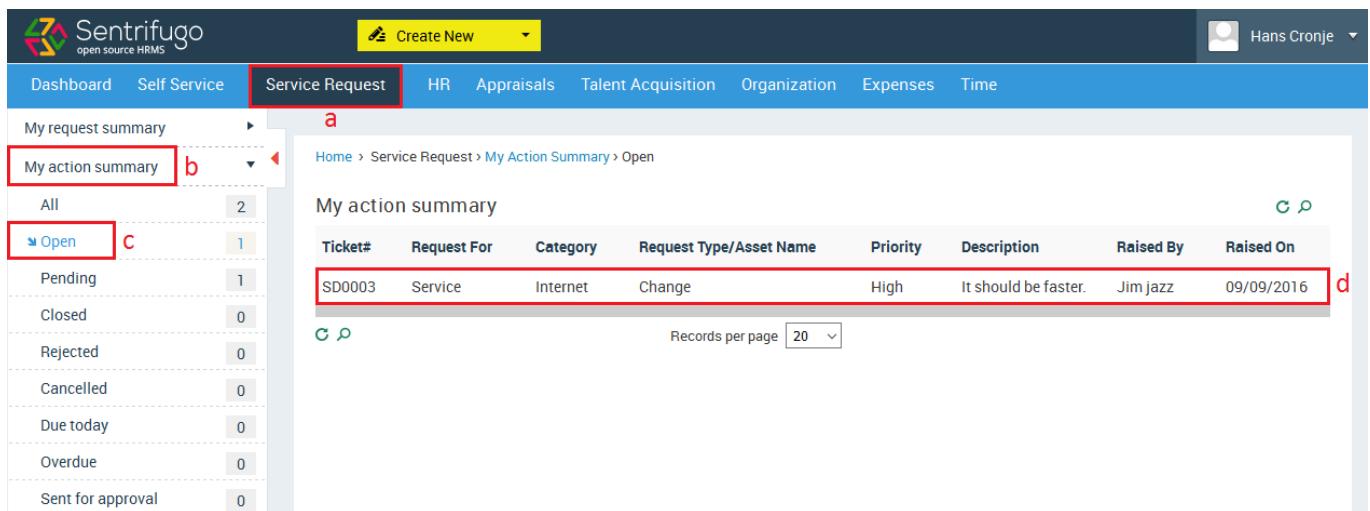
Figure 82

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

5.7 How do I execute a Service Request?

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

Please refer Figure 83



The screenshot shows the Sentrifugo web interface. At the top, there's a navigation bar with links for Dashboard, Self Service, Service Request (which is highlighted with a red box and labeled 'a'), HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. A 'Create New' button is also present. On the right, a user profile for 'Hans Cronje' is shown.

The main content area has a sidebar on the left titled 'My request summary' with a dropdown menu. The 'My action summary' option is selected and highlighted with a red box (labeled 'b'). Below it is a list of status filters: All (2), Open (1, labeled 'c'), Pending (1), Closed (0), Rejected (0), Cancelled (0), Due today (0), Overdue (0), and Sent for approval (0).

The main panel displays a table titled 'My action summary' with the following data:

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

At the bottom of the main panel, there are 'C' and 'P' icons, and a 'Records per page' dropdown set to 20. A red box labeled 'd' highlights the entire table row for ticket SD0003.

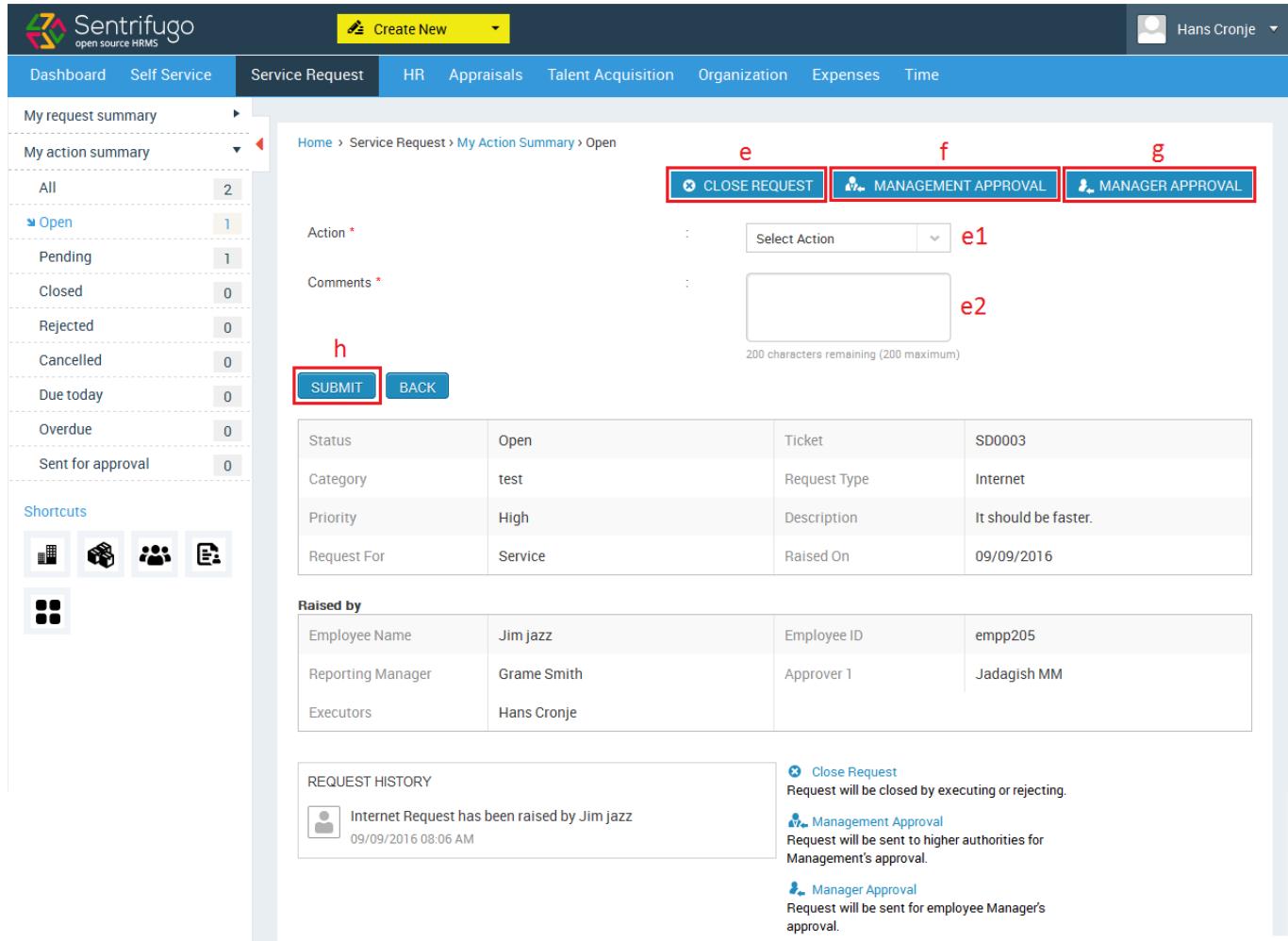
Figure 83

- 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



Service Request

Home > Service Request > My Action Summary > Open

Action *

Select Action

Comments *

200 characters remaining (200 maximum)

h

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

e **f** **g**

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

e1 **e2**

Figure 84

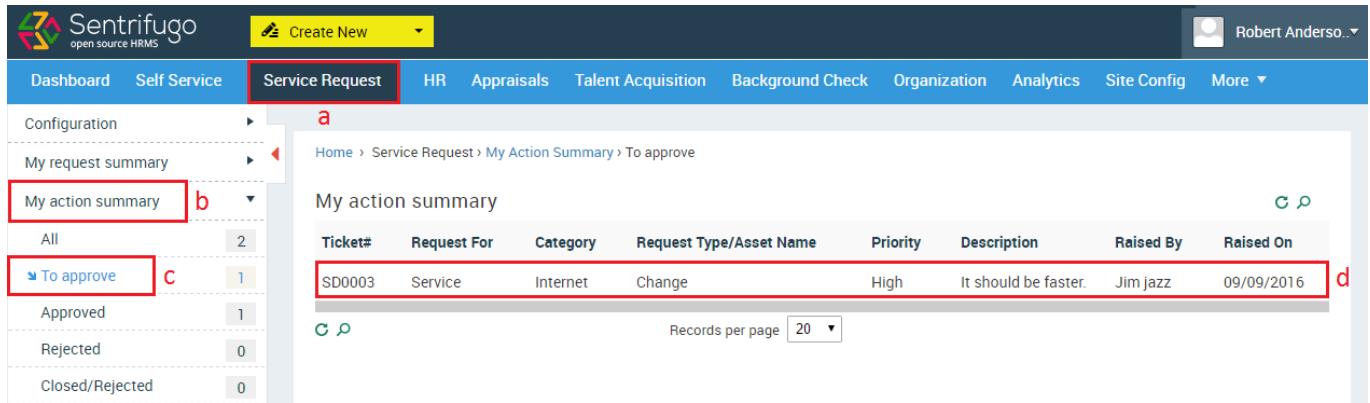
- e. Click **Close request** button to approve/reject the request.
 - e1. Select an action (Approve/Reject)
 - e2. Provide comments.
- f. Request **Management Approval** for the service request (They will be the approver(s) selected while configuring the Service Request Settings)
- g. Request **Manager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

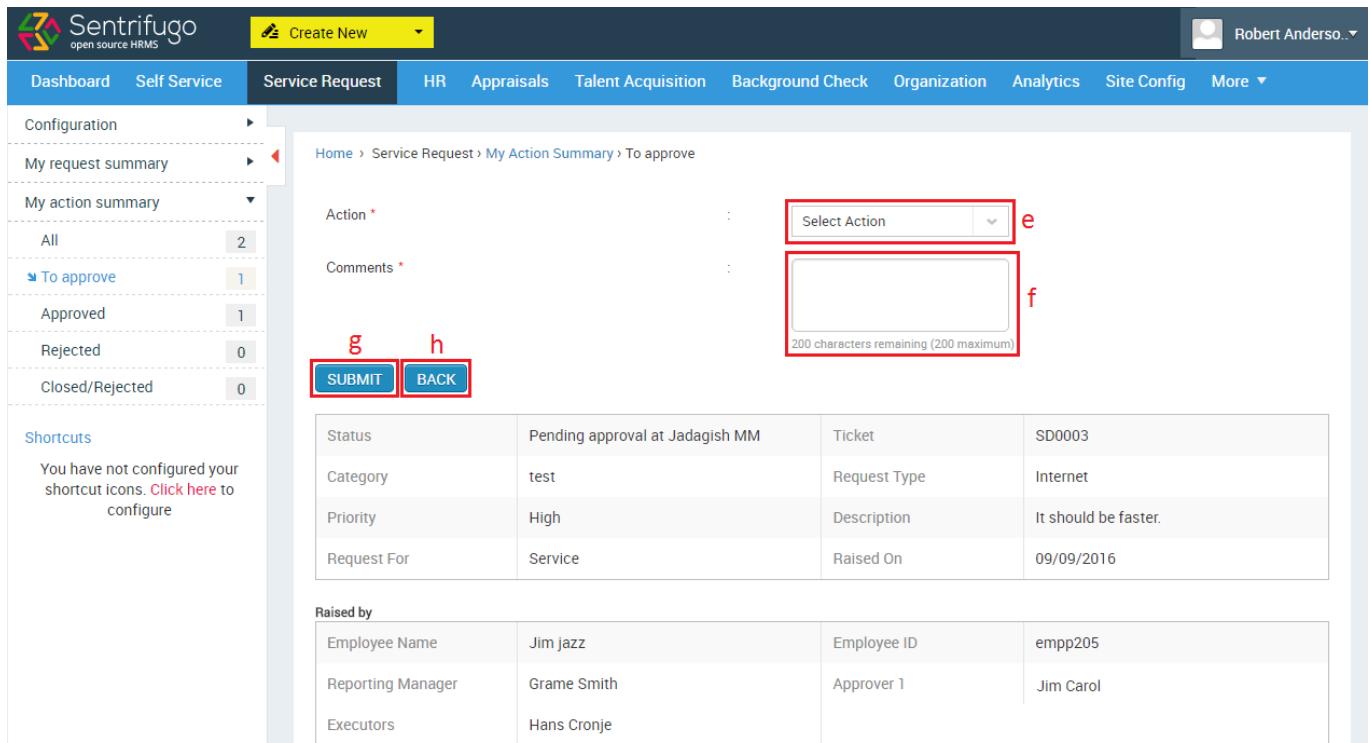


The screenshot shows the Sentrifugo interface with the 'Service Request' menu item highlighted. On the left, a sidebar displays 'My action summary' with a submenu for 'To approve' (marked with red box 'b'). The main content area shows a table of service requests (Ticket#, Request For, Category, Request Type/Asset Name, Priority, Description, Raised By, Raised On). One row is selected (marked with red box 'd') for ticket SD0003, which is a 'Service' request of type 'Change' with priority 'High' and description 'It should be faster.' raised by 'Jim jazz' on '09/09/2016'. Navigation links 'a' (Home > Service Request > My Action Summary > To approve) and 'c' (Records per page: 20) are also visible.

Figure 85

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

Please refer Figure 86



The screenshot shows the approval form for the service request from Figure 85. The 'Action' field (marked with red box 'e') is set to 'Select Action'. The 'Comments' field (marked with red box 'f') is a text area with placeholder text '200 characters remaining (200 maximum)'. Below the form are two buttons: 'SUBMIT' (marked with red box 'g') and 'BACK' (marked with red box 'h'). At the bottom, there are two tables: one for 'Status' and one for 'Raised by'. The 'Status' table contains fields for Status (Pending approval at Jadagish MM), Ticket (SD0003), Category (test), Request Type (Internet), Priority (High), Description (It should be faster.), and Request For (Service). The 'Raised by' table contains fields for Employee Name (Jim jazz), Employee ID (empp205), Reporting Manager (Grame Smith), Approver (Jim Carol), and Executors (Hans Cronje).

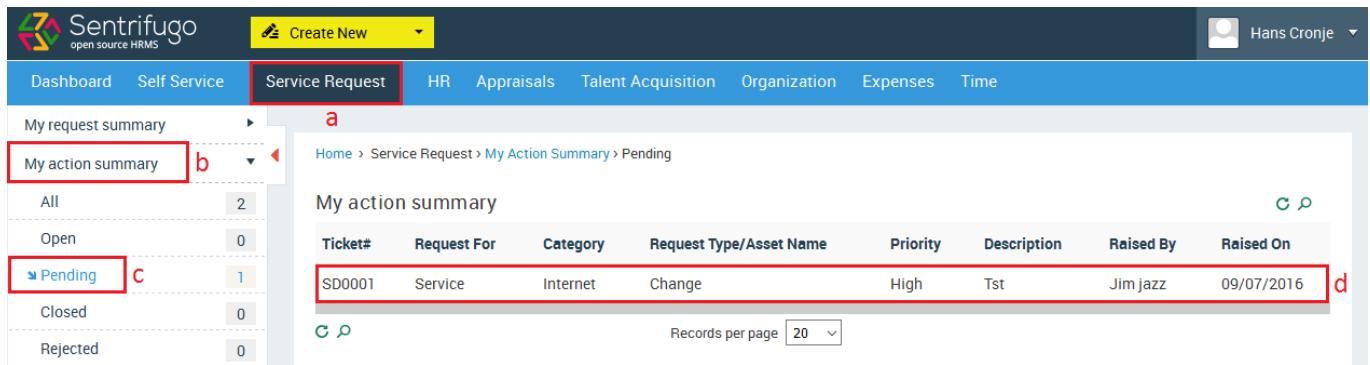
Figure 86

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

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

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

Please refer Figure 87



The screenshot shows the Sentrifugo web interface. At the top, there's a navigation bar with links for Dashboard, Self Service, Service Request (which is highlighted), HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. A user profile for 'Hans Cronje' is on the right. Below the navigation is a 'My request summary' section with a dropdown menu. Underneath it is a 'My action summary' section with a dropdown menu. The main content area displays 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 with letters a through d point to specific elements: 'a' points to the 'Service Request' menu item; 'b' points to the 'My action summary' dropdown; 'c' points to the 'Pending' status in the dropdown menu; and 'd' points to the single record in the table.

Figure 87

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

Please refer Figure 88

Sentrifugo open source HRMS

Create New ▾

Hans Cronje ▾

Dashboard Self Service Service Request HR Appraisals 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

Action * : Select Action e

Comments * : f

200 characters remaining (200 maximum)

g SUBMIT BACK

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

Raised by

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

Figure 88

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

6. HR

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

6.1 Adding Employees

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

6.2 How do I manage Roles & Privileges?

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

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

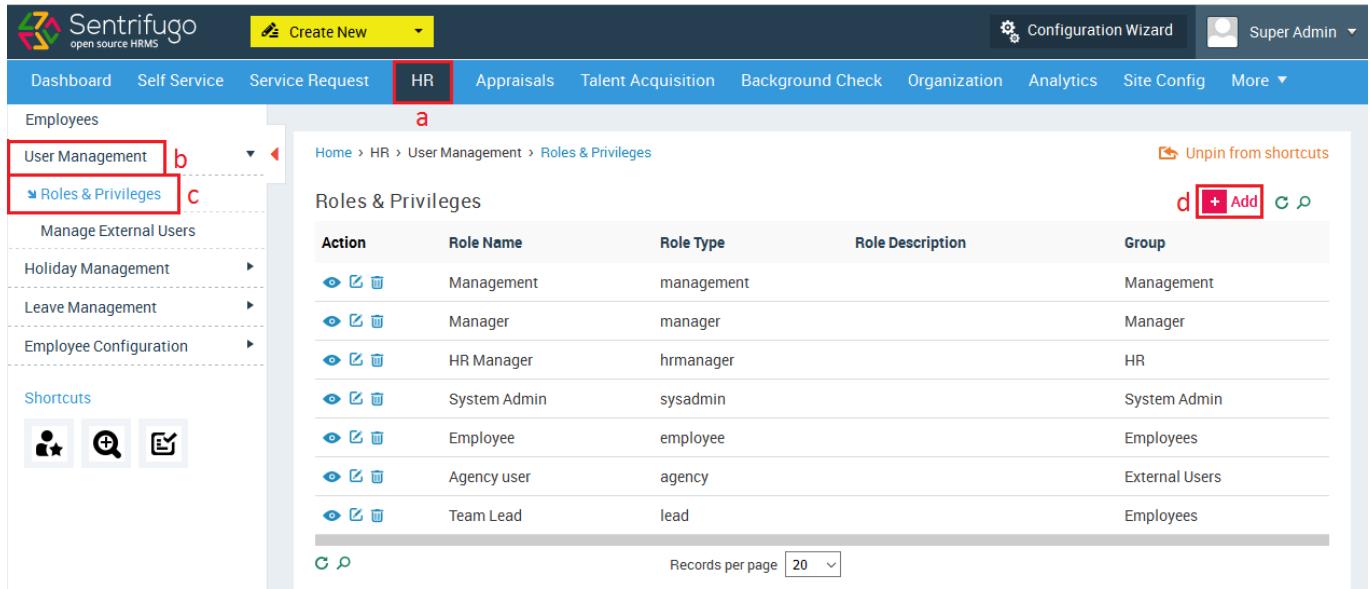
As mentioned earlier in section [1.1 What are the roles available in Sentrifugo?](#), there are 6 main role groups available by default in Sentrifugo:

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

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

To create a new role:

Please refer Figure 89



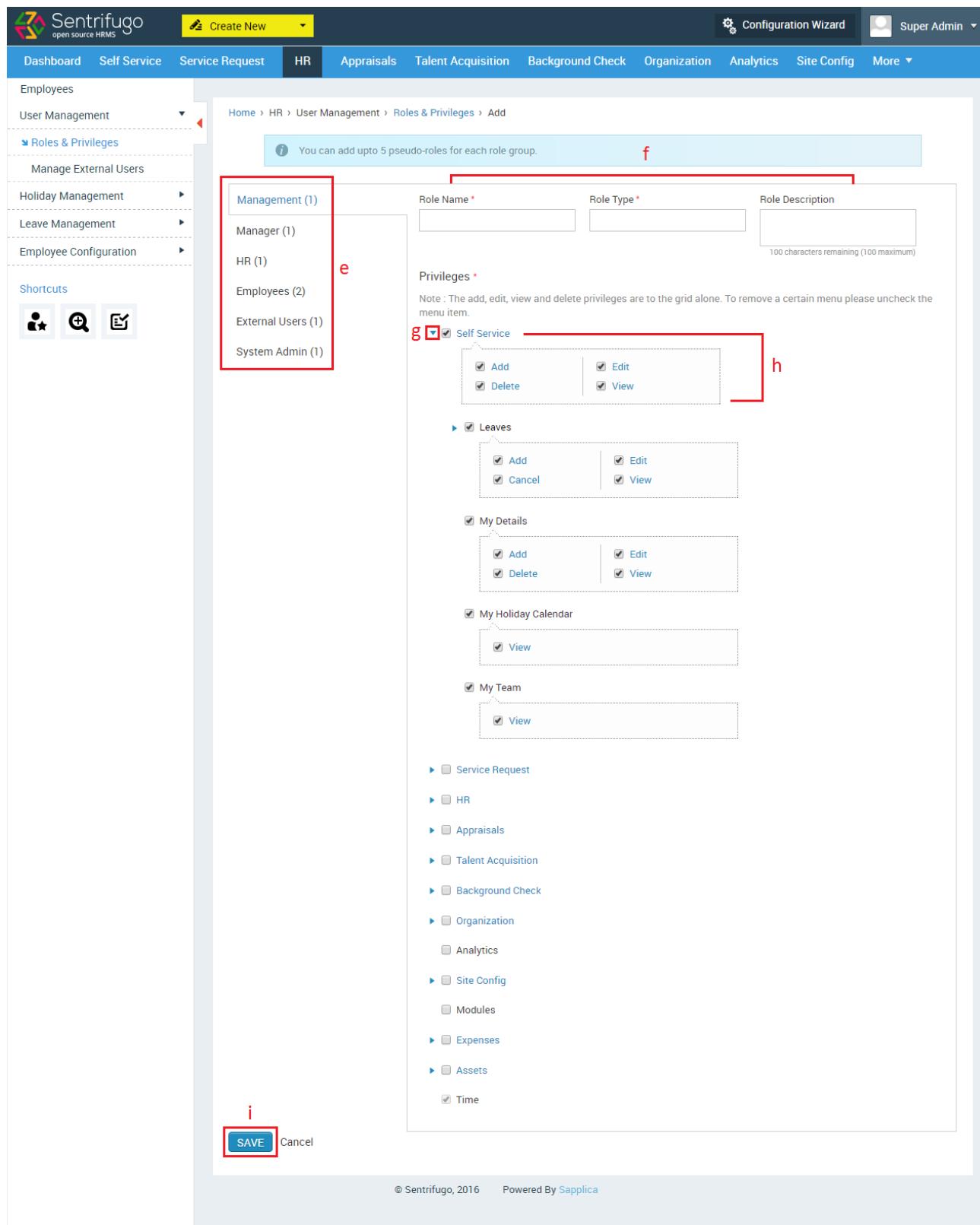
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has 'HR' selected (highlighted with a red box 'a'). The left sidebar under 'Employees' shows 'User Management' (highlighted with a red box 'b') and 'Roles & Privileges' (highlighted with a red box 'c') as sub-options. The main content area displays a table titled 'Roles & Privileges' with columns: Action, Role Name, Role Type, Role Description, and Group. The table lists seven roles: Management, Manager, HR Manager, System Admin, Employee, Agency user, and Team Lead. On the right side of the table, there are buttons for 'Unpin from shortcuts', '+Add' (highlighted with a red box 'd'), and search/filter options.

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

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

Please refer Figure 90



The screenshot shows the 'Roles & Privileges' add screen in the Sentrifugo HRMS application. On the left, there is a sidebar with various management options like Employees, User Management, Roles & Privileges, etc. The main area shows a breadcrumb path: Home > HR > User Management > Roles & Privileges > Add. A note says 'You can add upto 5 pseudo-roles for each role group.' Below this, a list of roles is shown in a red box labeled 'e': Management (1), Manager (1), HR (1), Employees (2), External Users (1), System Admin (1). To the right, there are input fields for Role Name*, Role Type*, and Role Description (with a note about character limit). A note below says 'Note : The add, edit, view and delete privileges are to the grid alone. To remove a certain menu please uncheck the menu item.' A section labeled 'Privileges*' contains several groups of checkboxes. One group under 'Self Service' is highlighted with a red box 'g'. Another group under 'Leaves' is highlighted with a red box 'h'. At the bottom, there is a 'SAVE' button highlighted with a red box 'i'.

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

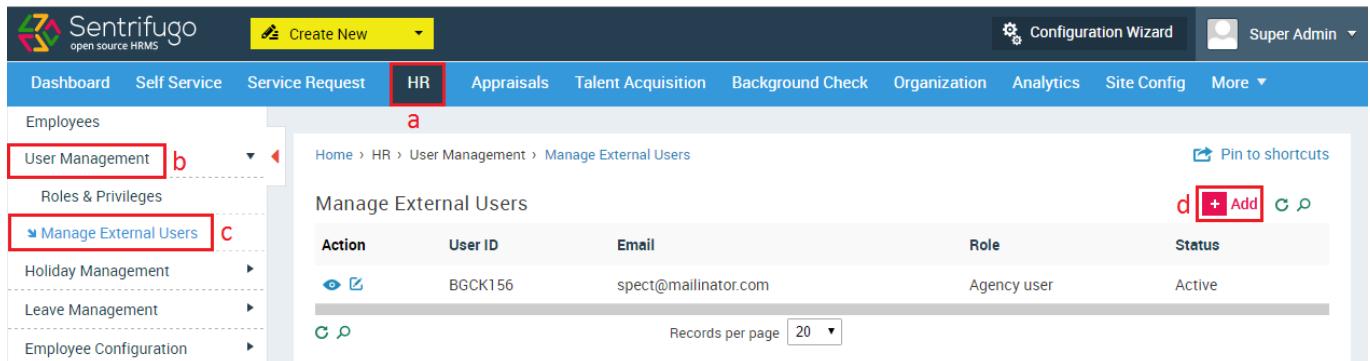
6.3 How do I add External Users?

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

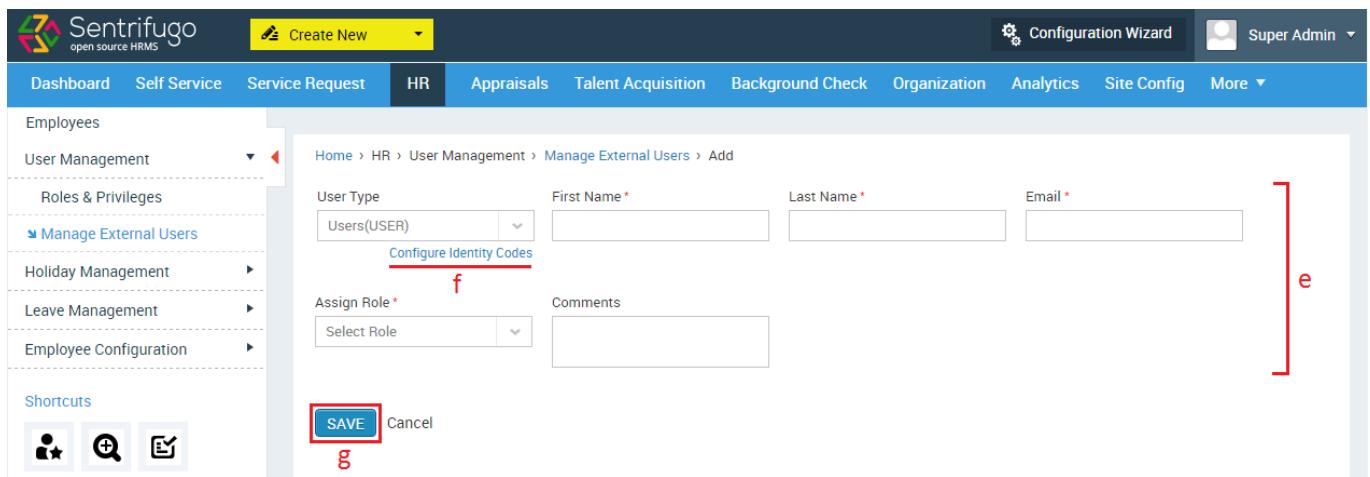


Action	User ID	Email	Role	Status
	BGCK156	spect@mailinator.com	Agency user	Active

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 HRM system's interface for managing external users. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar menu lists Employees, User Management (selected), Roles & Privileges, Manage External Users (highlighted in blue), Holiday Management, Leave Management, Employee Configuration, and Shortcuts. The main content area displays a form titled 'Manage External Users > Add'. It includes fields for User Type (set to 'Users(USER)'), First Name*, Last Name*, and Email*. Below these are 'Assign Role*' and 'Comments' fields. A 'Configure Identity Codes' link is visible above the role assignment field. At the bottom are 'SAVE' and 'Cancel' buttons, with 'SAVE' highlighted by a red box and arrow 'g' pointing to it.

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

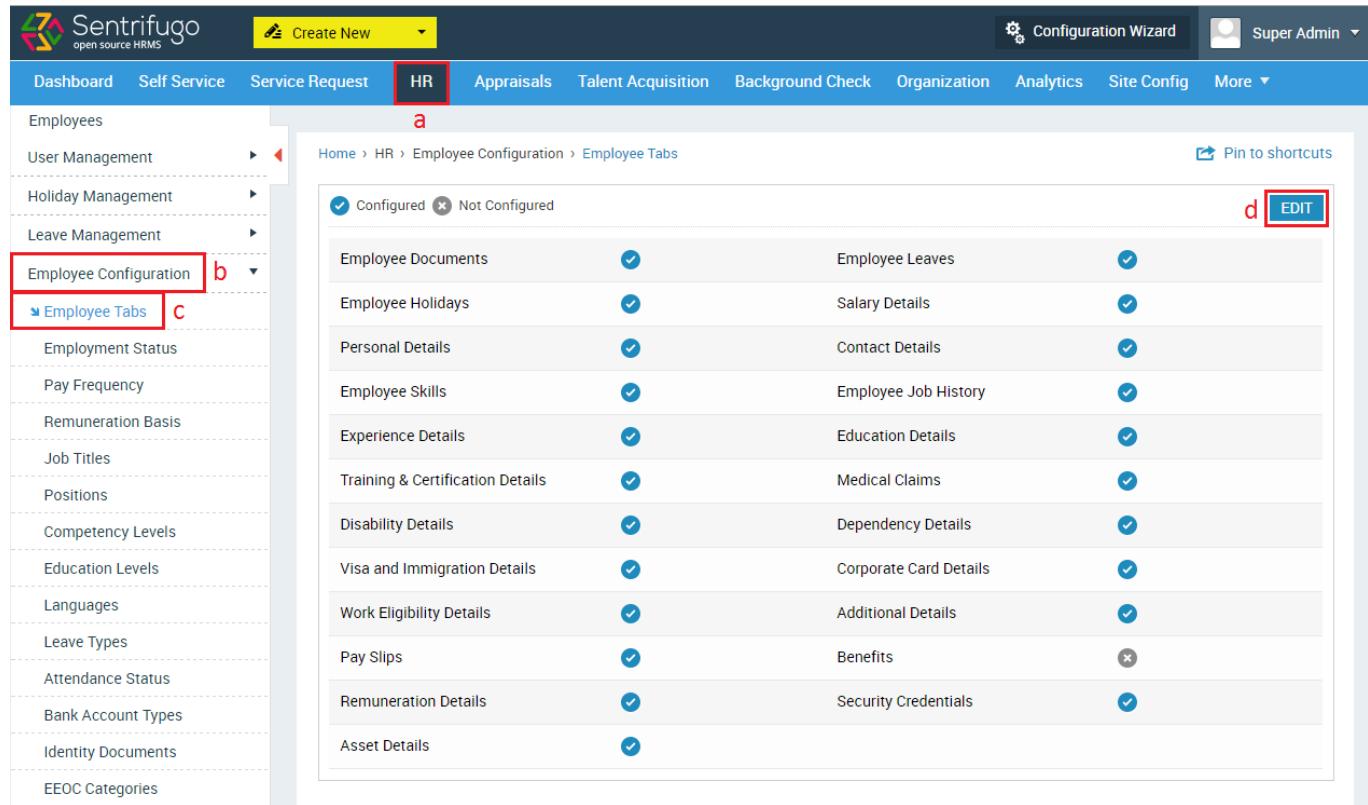
Please refer section [3. Leave Management](#)

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

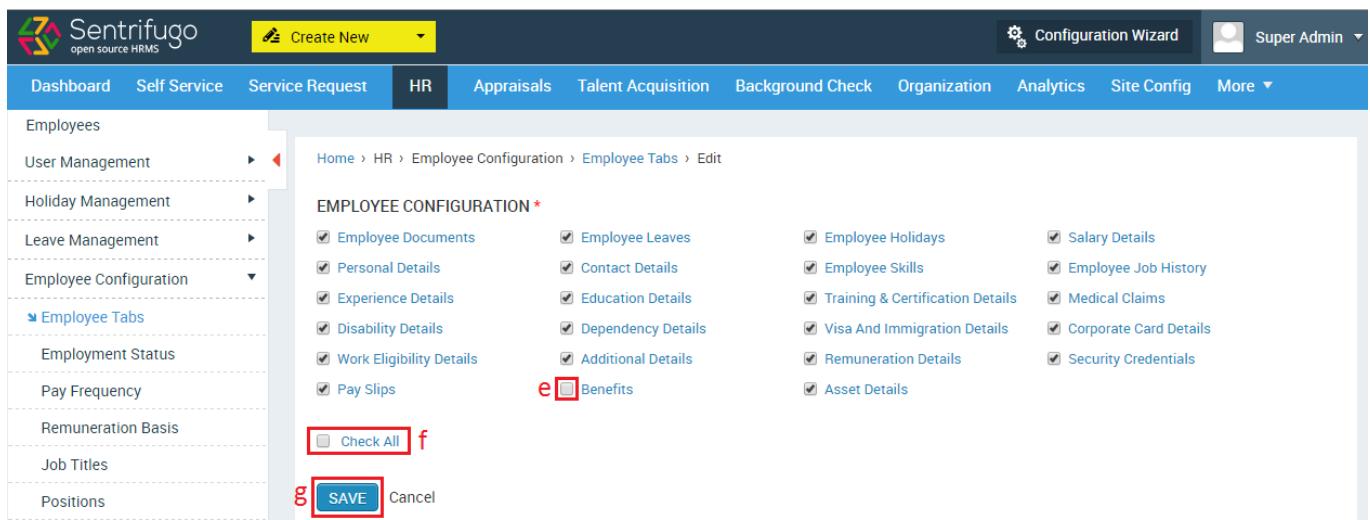


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes the logo, a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. The main menu has tabs for Dashboard, Self Service, Service Request, HR (which is highlighted with a red box), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar menu is open under 'Employee Configuration', showing options like Employee Management, Holiday Management, Leave Management, and Employee Configuration (which is also highlighted with a red box). Under Employee Configuration, 'Employee Tabs' is selected (highlighted with a red box and labeled 'C'). The main content area displays a list of tabs for configuration, each with a checked checkbox (Configured) or an unchecked checkbox (Not Configured). The tabs include 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. An 'EDIT' button is located in the top right corner of the configuration grid, with a red box drawn around it (labeled 'd').

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



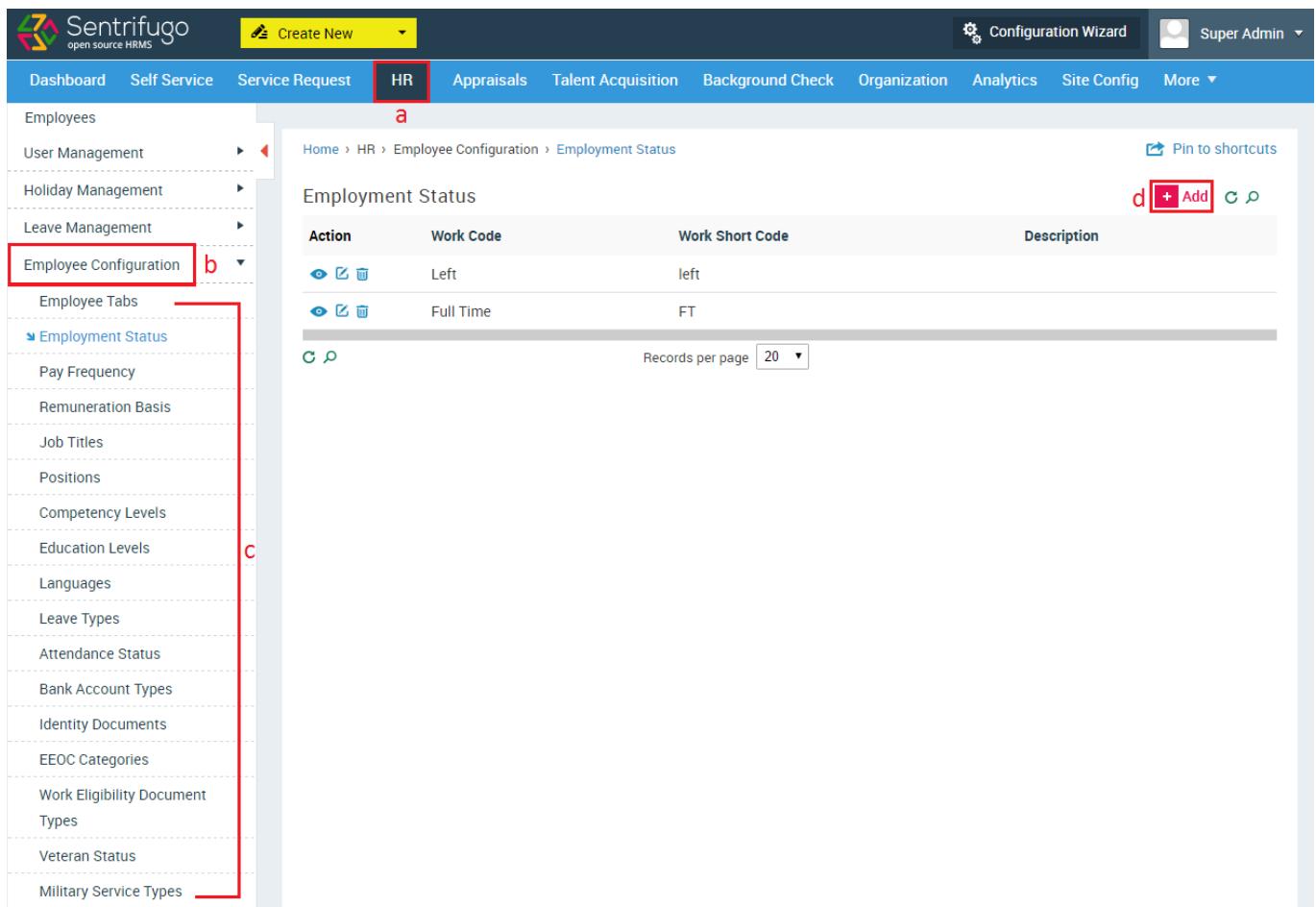
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Create New, Configuration Wizard, and Super Admin. The main menu has categories like Dashboard, Self Service, Service Request, HR (selected), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar under the Employees section lists User Management, Holiday Management, Leave Management, Employee Configuration (with Employee Tabs selected), Employment Status, Pay Frequency, Remuneration Basis, Job Titles, and Positions. The central content area is titled 'EMPLOYEE CONFIGURATION *' and shows a grid of checkboxes for various employee details. The 'Benefits' checkbox is highlighted with a red box and labeled 'e'. A 'Check All' checkbox is highlighted with a red box and labeled 'f'. The 'SAVE' button is highlighted with a red box and labeled 'g'.

Figure 94

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

6.6.2 How do I set Employee Configuration?

Please refer Figure 95



a

b

c

d

e

f

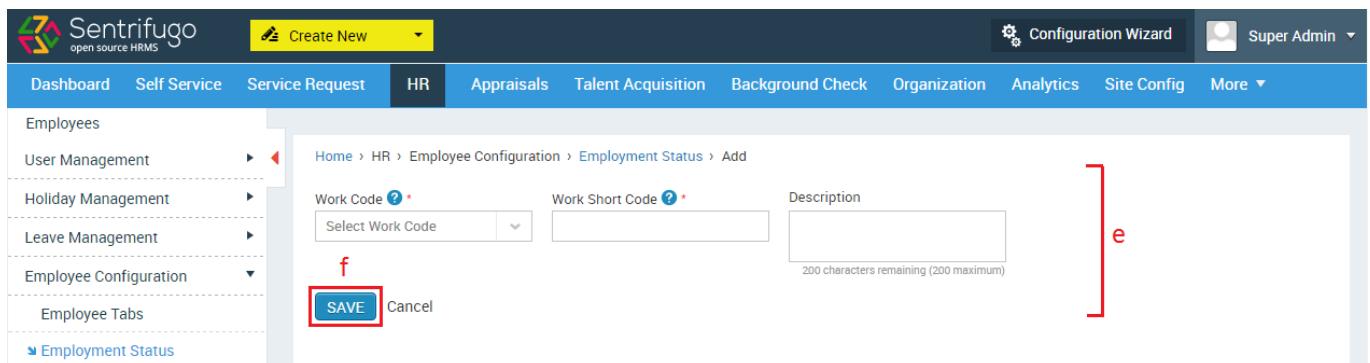
Action	Work Code	Work Short Code	Description
	Left	left	
	Full Time	FT	

Records per page: 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



f

e

g

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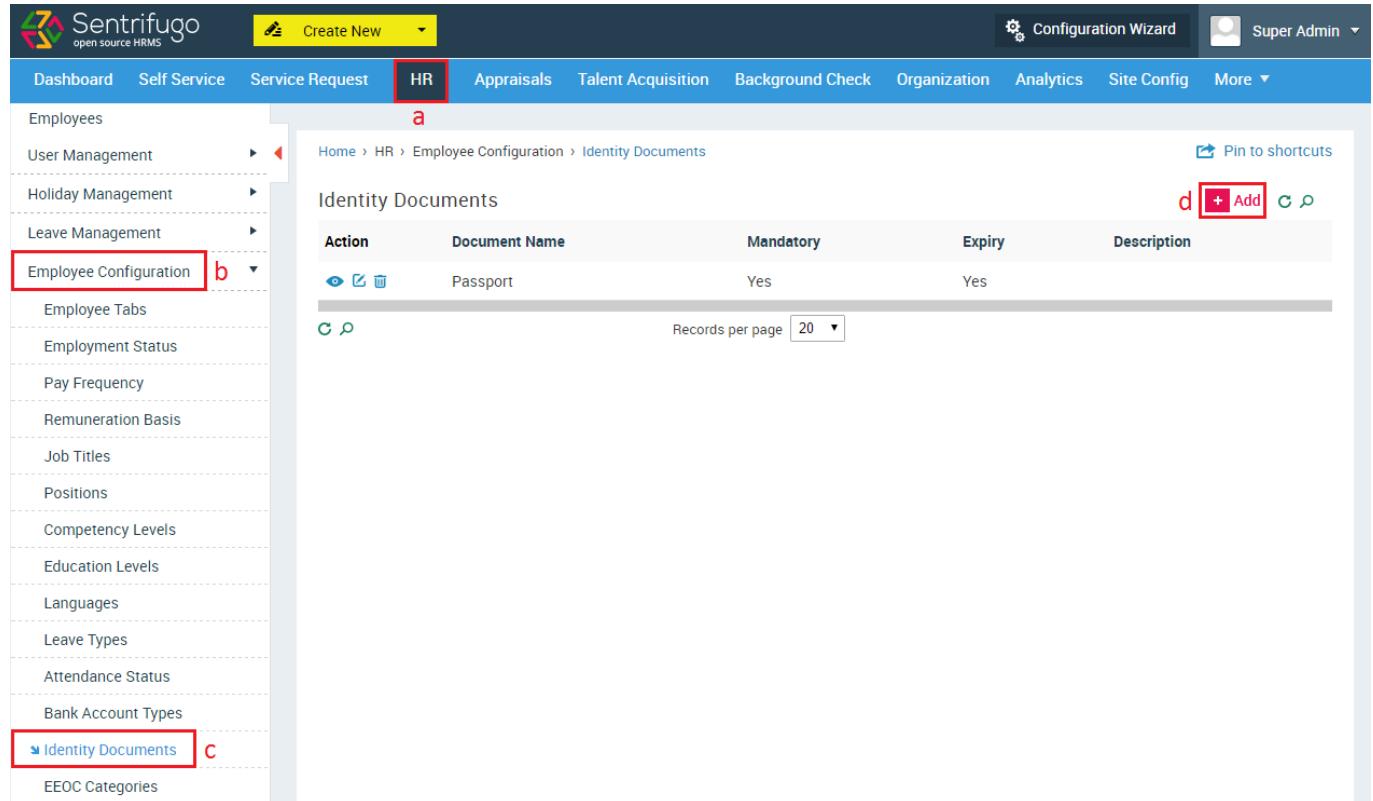
z

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

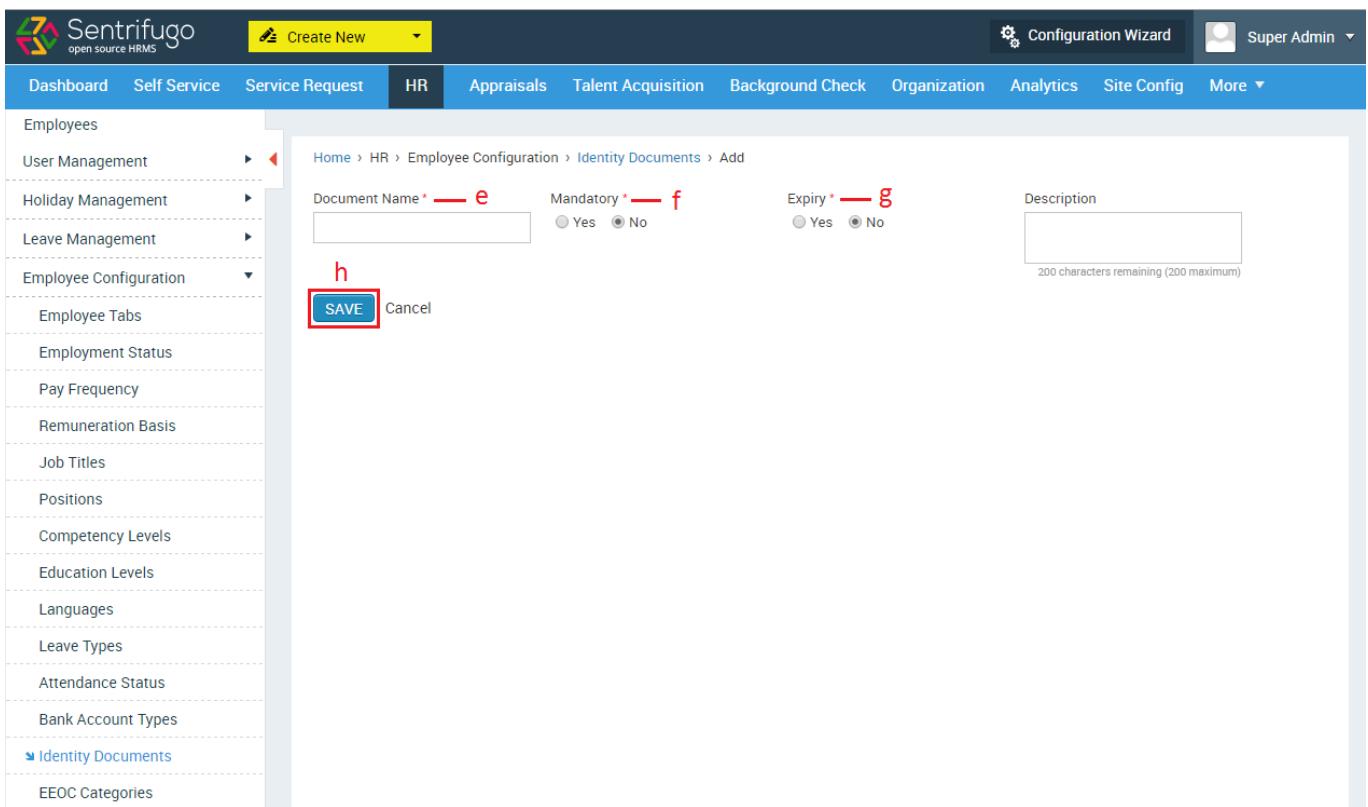


Action	Document Name	Mandatory	Expiry	Description
	Passport	Yes	Yes	

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 HRMS 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. The left sidebar under 'Employees' lists categories like User Management, Holiday Management, Leave Management, Employee Configuration, Employment Status, Pay Frequency, Remuneration Basis, Job Titles, Positions, Competency Levels, Education Levels, Languages, Leave Types, Attendance Status, Bank Account Types, Identity Documents (selected), and EEOC Categories. The main content area displays a form titled 'Identity Documents > Add'. It has fields for 'Document Name' (labeled 'e'), 'Mandatory' (radio buttons for 'Yes' and 'No', with 'No' selected), 'Expiry' (radio buttons for 'Yes' and 'No', with 'Yes' selected), and a 'Description' text area with a character limit of 200. Below the form are 'SAVE' and 'Cancel' buttons, with 'SAVE' highlighted by a red box and labeled 'h'.

Figure 98

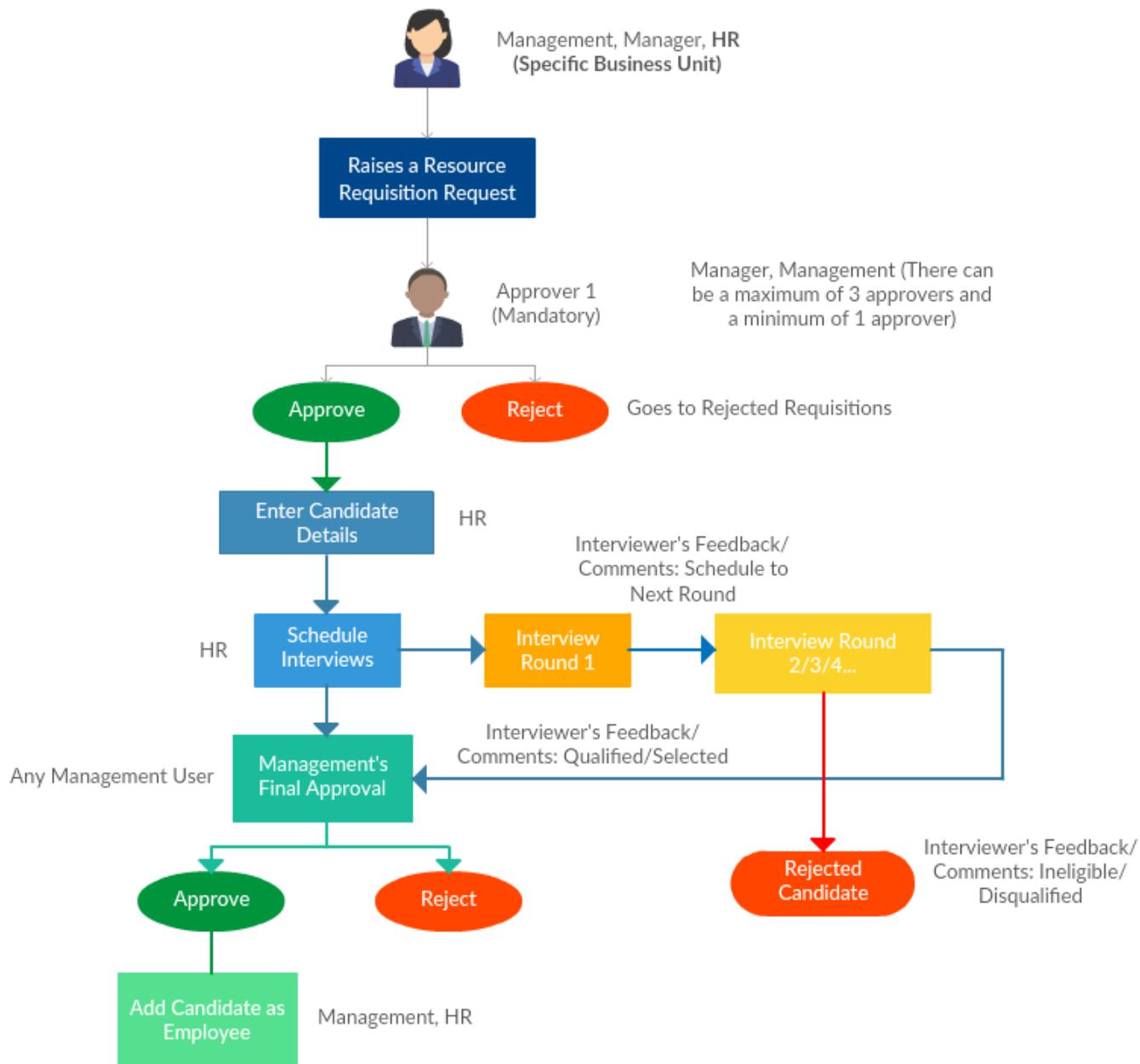
- e. Enter document name
- f. Select if you require a document to be mandatory or not
- g. Select if documents needs to have an expiry date
- h. Click **SAVE** button



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.

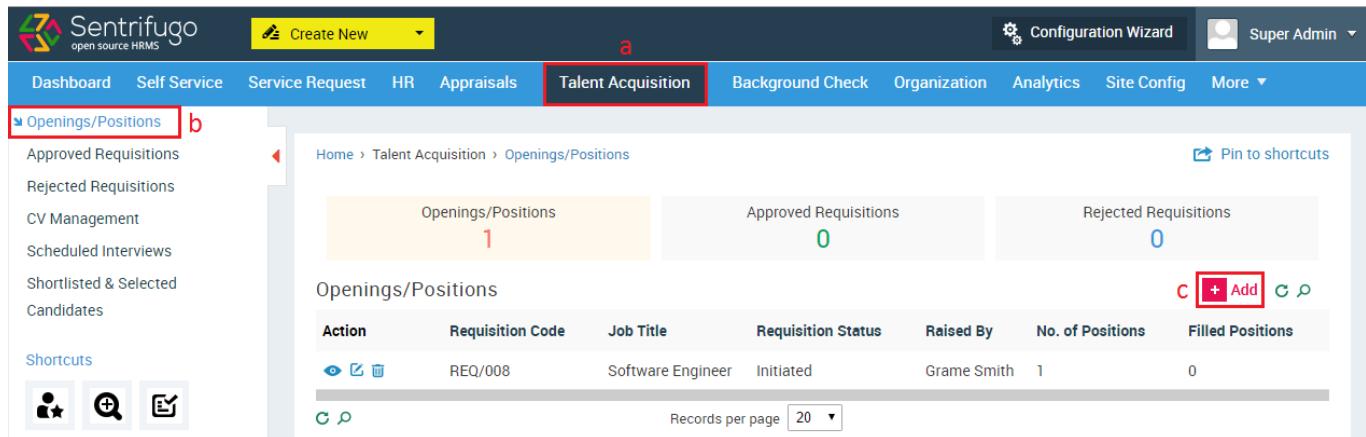


Description:

- 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

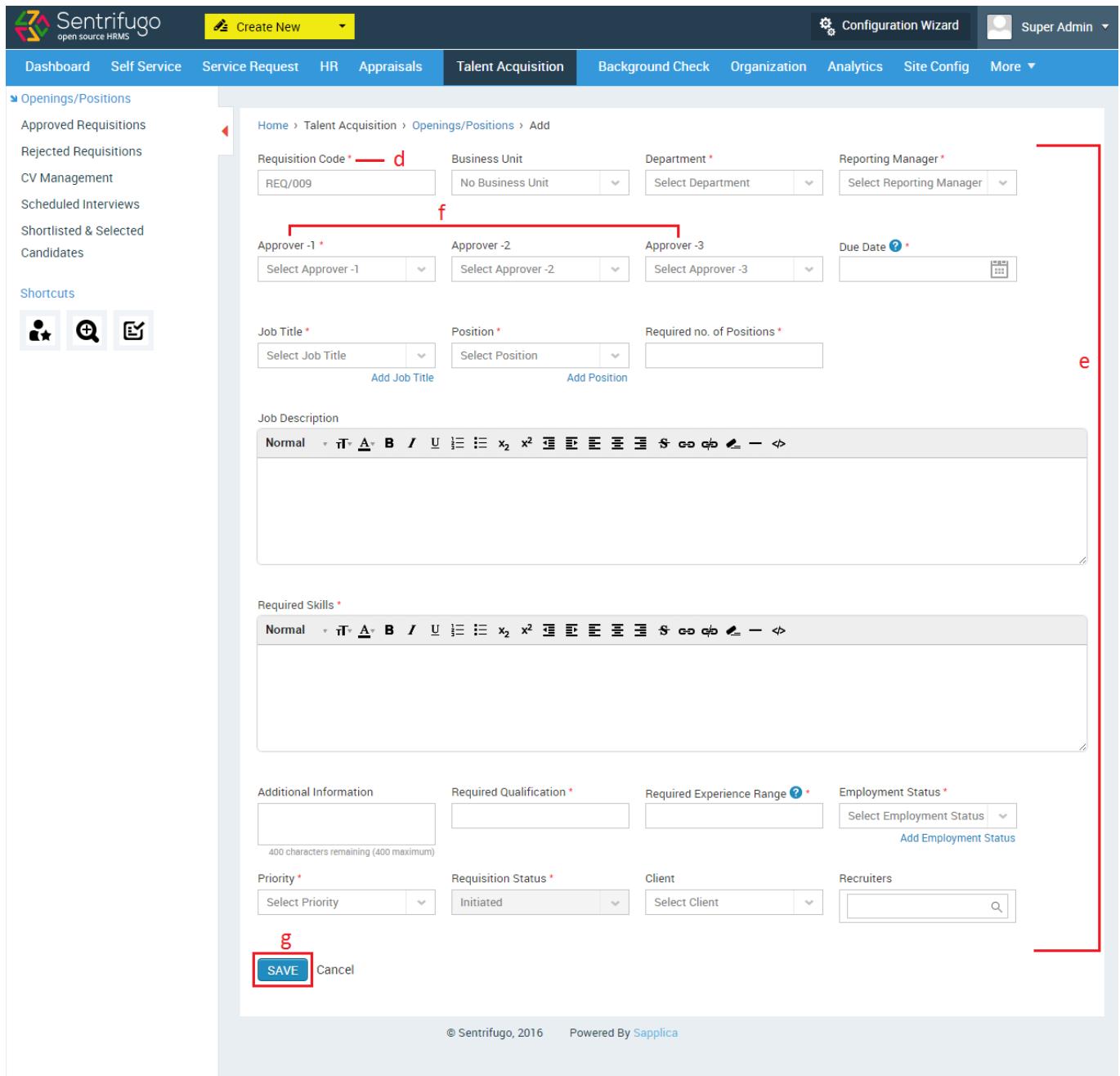


Action	Requisition Code	Job Title	Requisition Status	Raised By	No. of Positions	Filled Positions
	REQ/008	Software Engineer	Initiated	Grame Smith	1	0

Figure 99

- 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



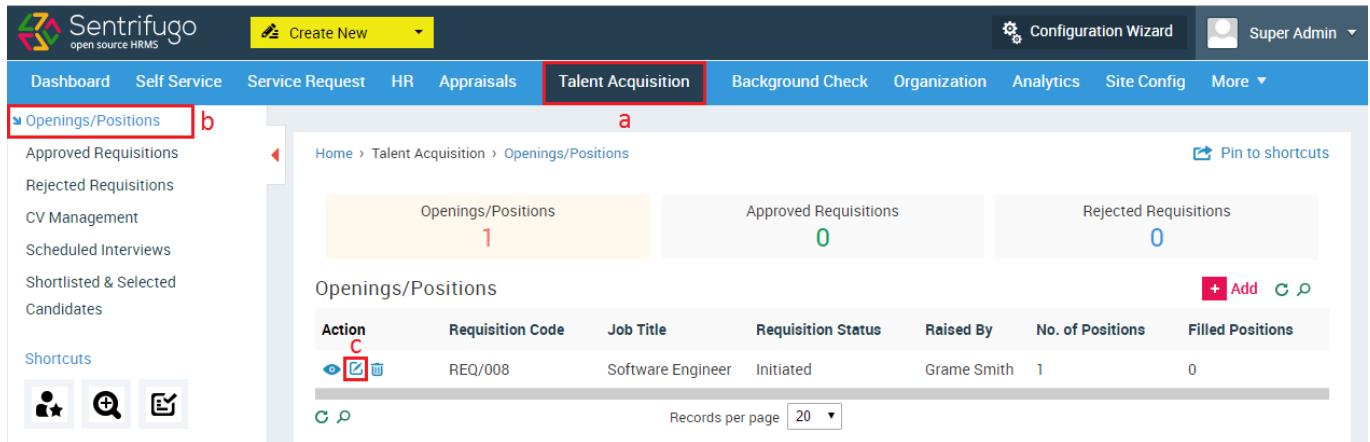
The screenshot shows the Talent Acquisition module's 'Openings/Positions' section. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition (selected), Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists 'Openings/Positions' sub-sections like Approved Requisitions, Rejected Requisitions, CV Management, Scheduled Interviews, Shortlisted & Selected Candidates, and Shortcuts. The main form area has fields for Requisition Code (d, REQ/009), Business Unit (No Business Unit), Department (Select Department), Reporting Manager (Select Reporting Manager), Approver -1, Approver -2, Approver -3, Due Date, Job Title, Position, Required no. of Positions, Job Description (with rich text editor), Required Skills (with rich text editor), Additional Information (with note: 400 characters remaining), Required Qualification, Required Experience Range, Employment Status (Select Employment Status, Add Employment Status), Priority (Select Priority), Requisition Status (Initiated), Client (Select Client), Recruiters, and a footer with Save and Cancel buttons.

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

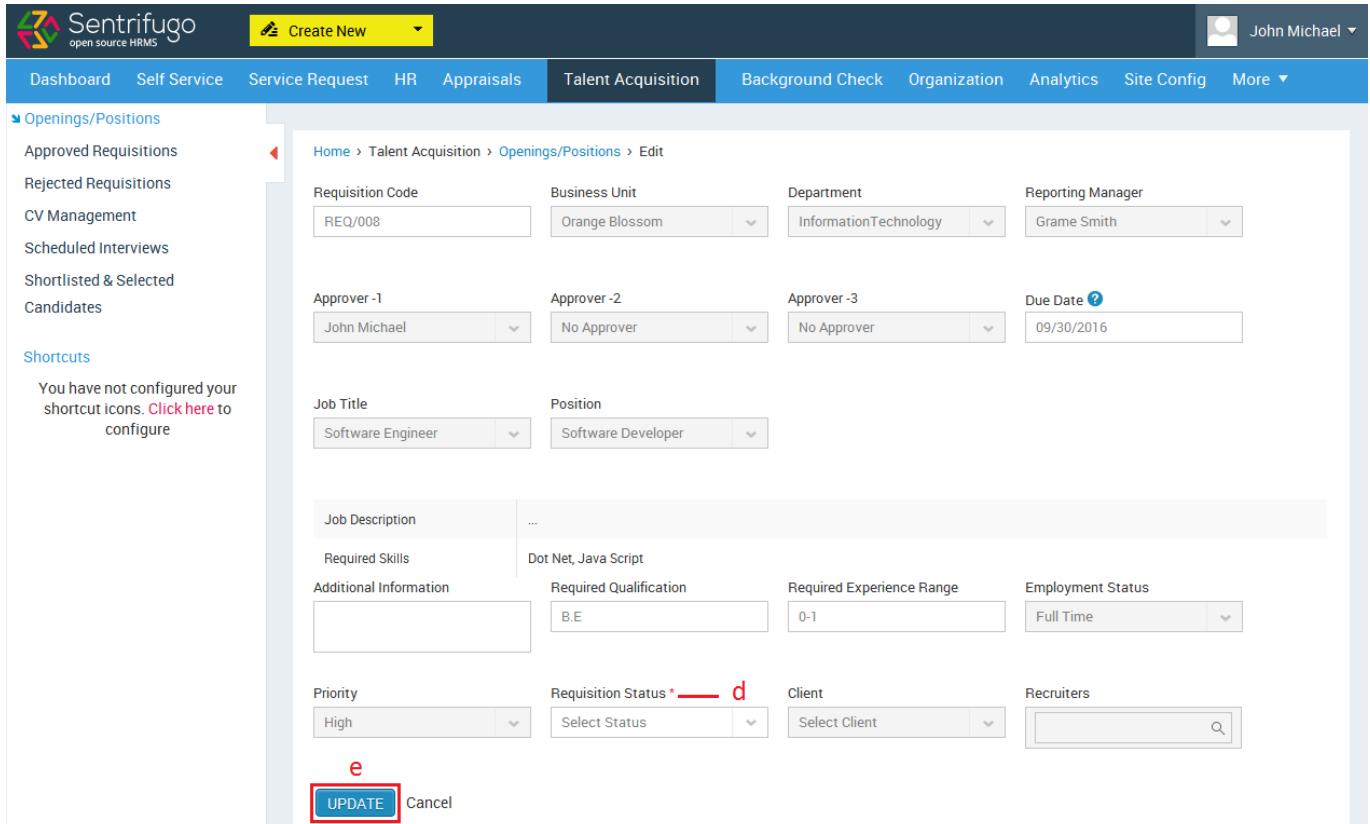


The screenshot shows the Talent Acquisition section of the Sentrifugo interface. The top navigation bar includes 'Create New', 'Configuration Wizard', 'Super Admin', and other tabs like Dashboard, Self Service, Service Request, HR, Appraisals, and Talent Acquisition (which is highlighted). A left sidebar menu has 'Openings/Positions' selected (marked 'b'). The main content area displays a summary of openings: 1 Approved Requisition, 0 Rejected Requisitions, and 0 Background Checks. Below this is a table for 'Openings/Positions' with one row: Requisition Code REQ/008, Job Title Software Engineer, Requisition Status Initiated, Raised By Grame Smith, No. of Positions 1, and Filled Positions 0. Action icons (Edit, Delete) are shown for each row. A red box labeled 'a' points to the 'Talent Acquisition' tab.

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' screen for a requisition. The top navigation bar and sidebar are similar to Figure 101. The main form contains fields for Requisition Code (REQ/008), Business Unit (Orange Blossom), Department (InformationTechnology), and Reporting Manager (Grame Smith). It also includes approver fields (Approver -1: John Michael, Approver -2: No Approver, Approver -3: No Approver) and a Due Date (09/30/2016). Below these are sections for 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). A red box labeled 'e' points to the 'UPDATE' button at the bottom.

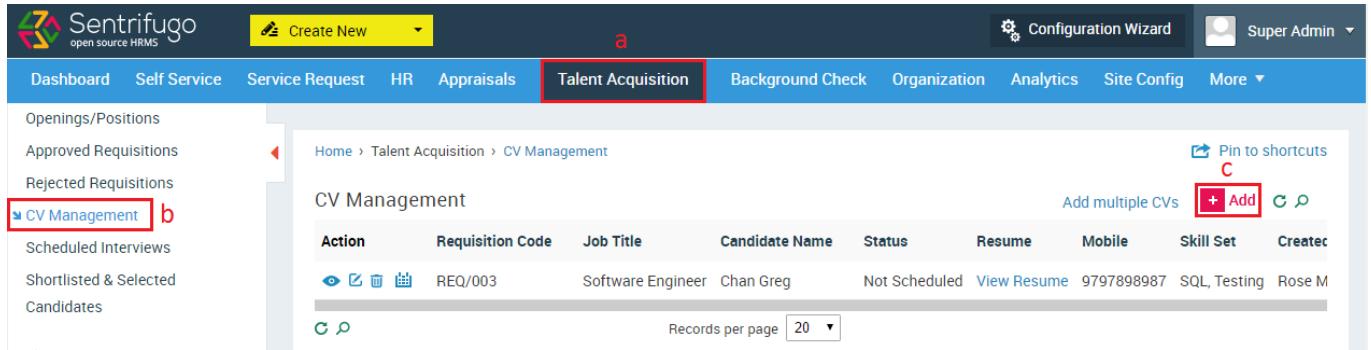
Figure 102

- 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



Action	Requisition Code	Job Title	Candidate Name	Status	Resume	Mobile	Skill Set	Created
	REQ/003	Software Engineer	Chan Greg	Not Scheduled	View Resume	9797898987	SQL, Testing	Rose M

Figure 103

- Click **Talent Acquisition** in the top menu
- Click **CV Management** on the left side panel
- 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
150 characters remaining (150 maximum) Add Country Add State Add City **e**

Postal Code *

PREVIOUS COMPANY DETAILS

Company 1	Company Name	Designation	From ?
Company 2	<input type="text"/>	<input type="text"/>	<input type="text"/>
Company 3	<input type="text"/>	<input type="text"/>	<input type="text"/>
	To ?	Contact Number	Web site
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Address		
	<input type="text"/>		

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

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Figure 104

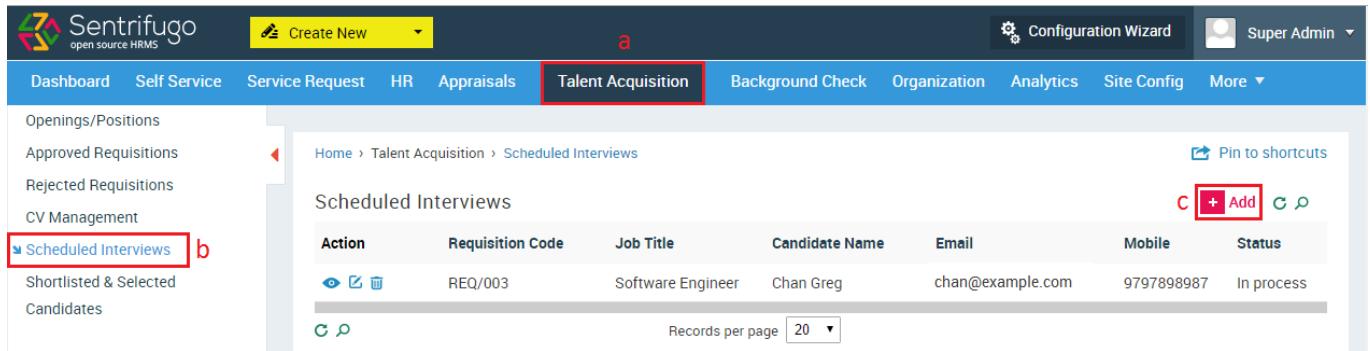
- d. Select the Requisition ID
- e. Enter Candidate's name
- f1. Click to upload resume

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

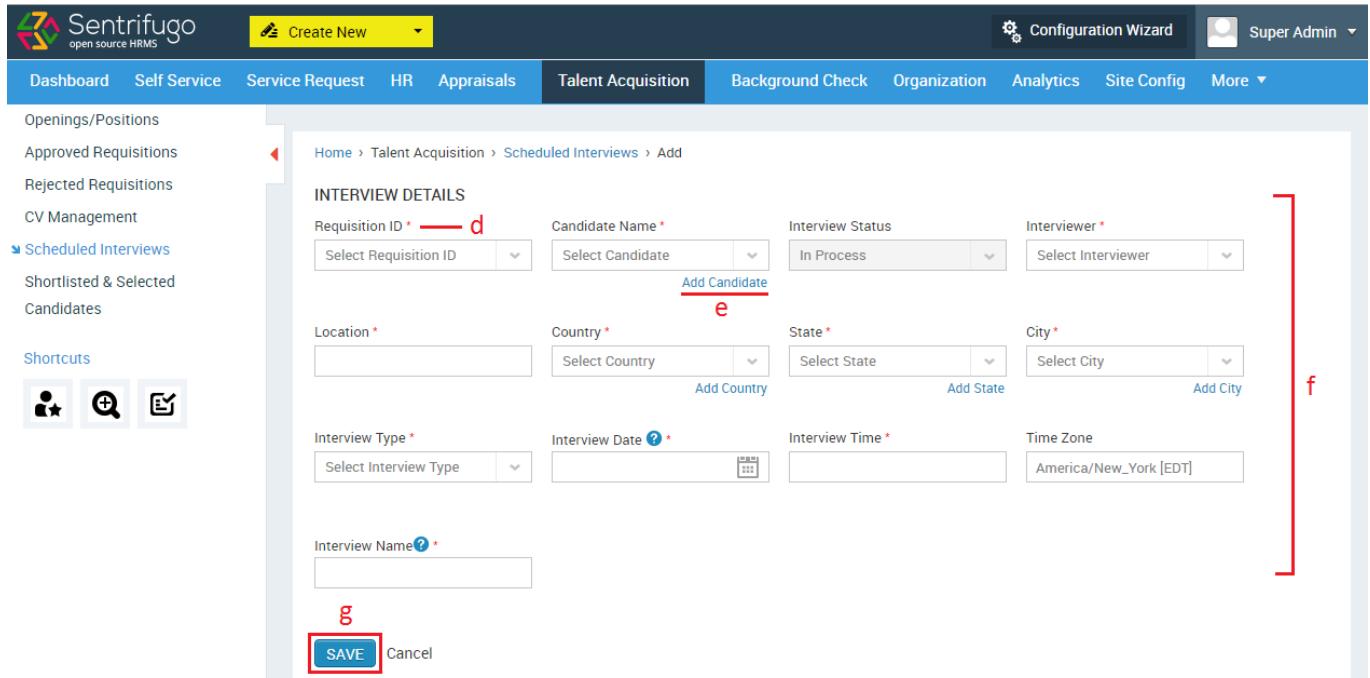


The screenshot shows the Talent Acquisition module. The top navigation bar has tabs: Dashboard, Self Service, Service Request, HR, Appraisals, **Talent Acquisition**, Background Check, Organization, Analytics, Site Config, and More. The 'Talent Acquisition' tab is highlighted with a red box. The left sidebar menu includes: Openings/Positions, Approved Requisitions, Rejected Requisitions, CV Management, **Scheduled Interviews** (selected), and Shortlisted & Selected Candidates. A red box labeled 'b' highlights the 'Scheduled Interviews' link. 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 displayed: Action (eye icon), Requisition Code (REQ/003), Job Title (Software Engineer), Candidate Name (Chan Greg), Email (chan@example.com), Mobile (9797898987), and Status (In process). Below the table are 'Records per page' dropdown and a 'Pin to shortcuts' button.

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 'INTERVIEW DETAILS'. The top navigation bar has tabs: Dashboard, Self Service, Service Request, HR, Appraisals, **Talent Acquisition**, Background Check, Organization, Analytics, Site Config, and More. The 'Talent Acquisition' tab is highlighted. The left sidebar menu includes: Openings/Positions, Approved Requisitions, Rejected Requisitions, CV Management, **Scheduled Interviews** (selected), and Shortlisted & Selected Candidates. A red box labeled 'd' highlights the 'Requisition ID' field. The main form fields include: Requisition ID (dropdown), Candidate Name (dropdown), Interview Status (dropdown), Interviewer (dropdown), Location (text input), Country (dropdown), State (dropdown), City (dropdown), Interview Type (dropdown), Interview Date (date input), Interview Time (time input), Time Zone (dropdown), Interview Name (text input), and a 'SAVE' button. A red bracket labeled 'f' covers the right side of the form. A red box labeled 'g' highlights the 'SAVE' button.

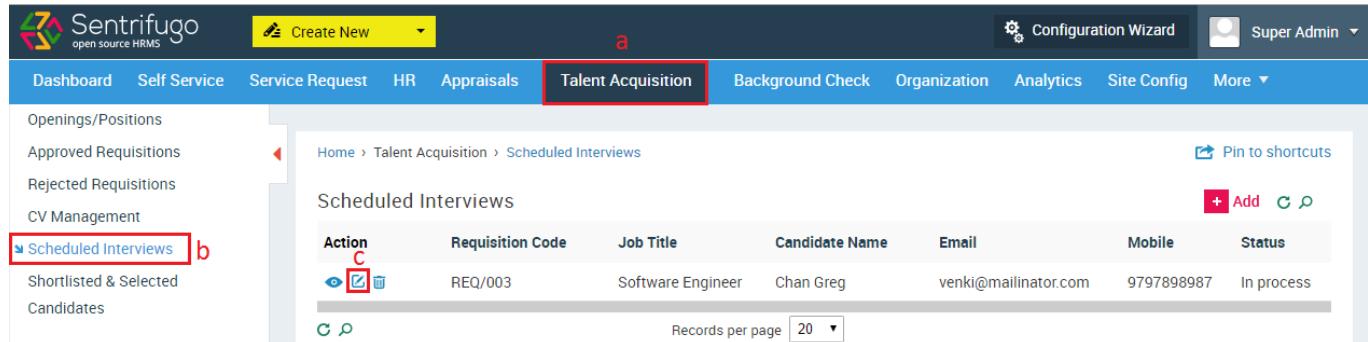
Figure 106

- 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

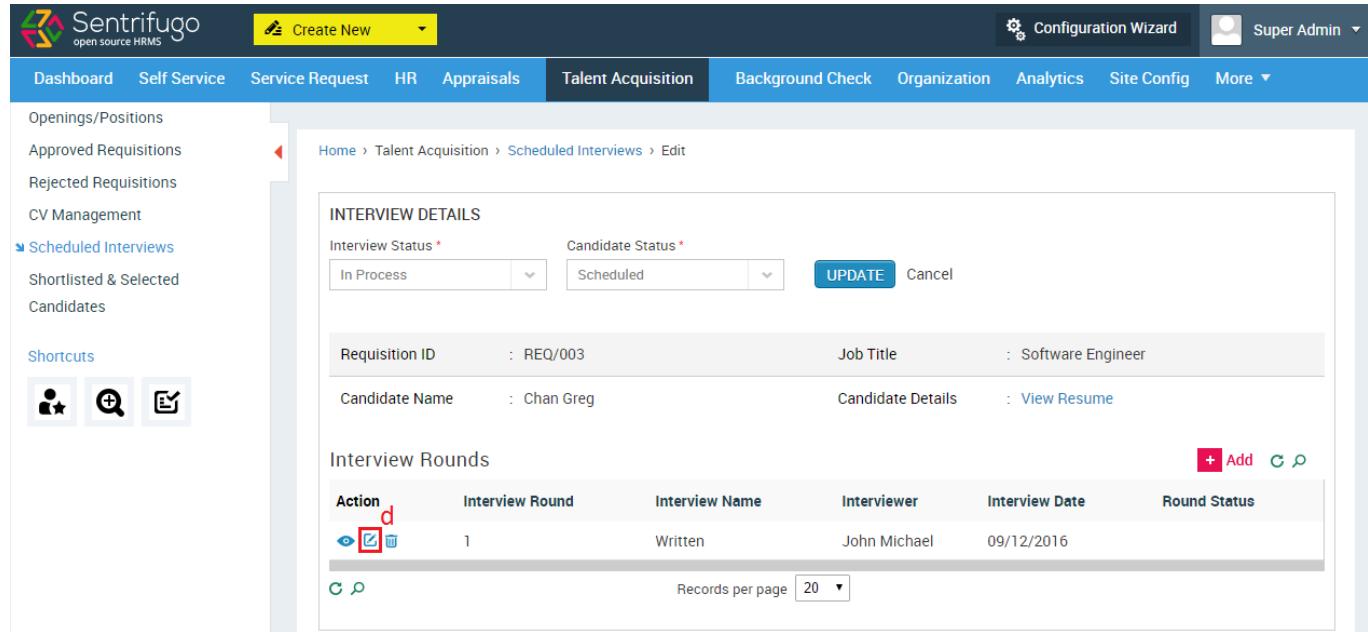


The screenshot shows the Sentrifugo web interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, **Talent Acquisition**, Background Check, Organization, Analytics, Site Config, and More. A sidebar on the left lists 'Openings/Positions', 'Approved Requisitions', 'Rejected Requisitions', 'CV Management', and **Scheduled Interviews**. The main content area displays a table titled 'Scheduled Interviews' with columns: Action, Requisition Code, Job Title, Candidate Name, Email, Mobile, and Status. One row is shown: 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 'Delete' buttons at the top right of the table.

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, there are sections for 'Requisition ID' (REQ/003), 'Job Title' (Software Engineer), 'Candidate Name' (Chan Greg), and 'Candidate Details' (View Resume). A 'Interview Rounds' section follows, featuring a table with columns: Action, Interview Round, Interview Name, Interviewer, Interview Date, and Round Status. One round is listed: Interview Round 1, Interview Name Written, Interviewer John Michael, Interview Date 09/12/2016. There are 'Add', 'Edit', and 'Delete' buttons at the top right of the table.

Figure 108

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

Please refer Figure 109

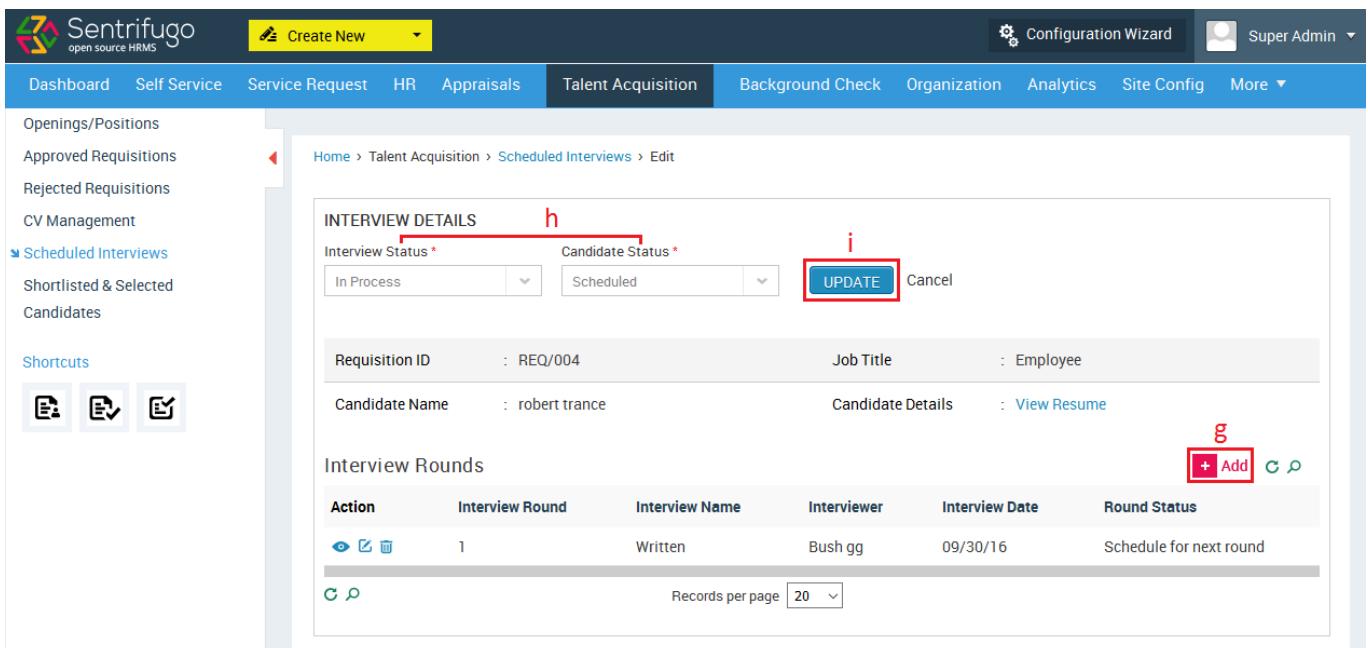
Interview Rounds

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 *	Select Status Cancel	
f	<input style="background-color: #0070C0; color: white; border: 1px solid #0070C0; padding: 5px; width: 150px; height: 30px; border-radius: 5px; font-weight: bold; margin-bottom: 10px;" type="button" value="UPDATE"/> UPDATE	

Figure 109

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

Please refer Figure 110



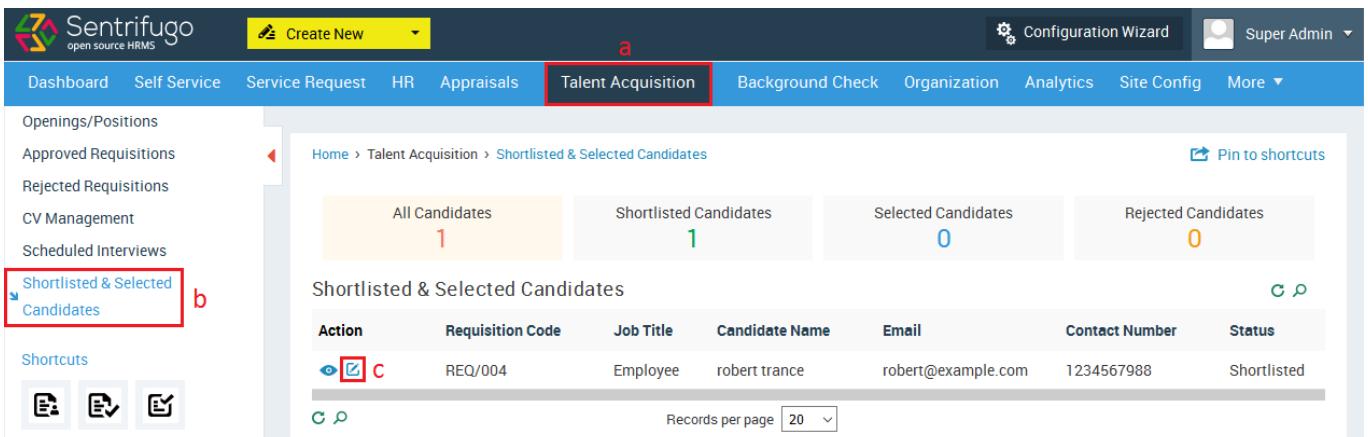
The screenshot shows the Talent Acquisition module's 'Scheduled Interviews' section. At the top, there are tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition (which is selected and highlighted in blue), Background Check, Organization, Analytics, Site Config, More, Configuration Wizard, and Super Admin. On the left, a sidebar lists Openings/Positions, Approved Requisitions, Rejected Requisitions, CV Management, Scheduled Interviews (selected and highlighted in blue), Shortlisted & Selected Candidates, and Shortcuts. The main content area shows 'INTERVIEW DETAILS' with fields for Interview Status (In Process) and Candidate Status (Scheduled). A large red box highlights the 'UPDATE' button. Below this, a table shows Interview Rounds with one row: Action (Edit icon), Interview Round (1), Interview Name (Written), Interviewer (Bush gg), Interview Date (09/30/16), and Round Status (Schedule for next round). A red box highlights the '+Add' button in the top right of the interview rounds table. The bottom of the page has a 'Records per page' dropdown set to 20.

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

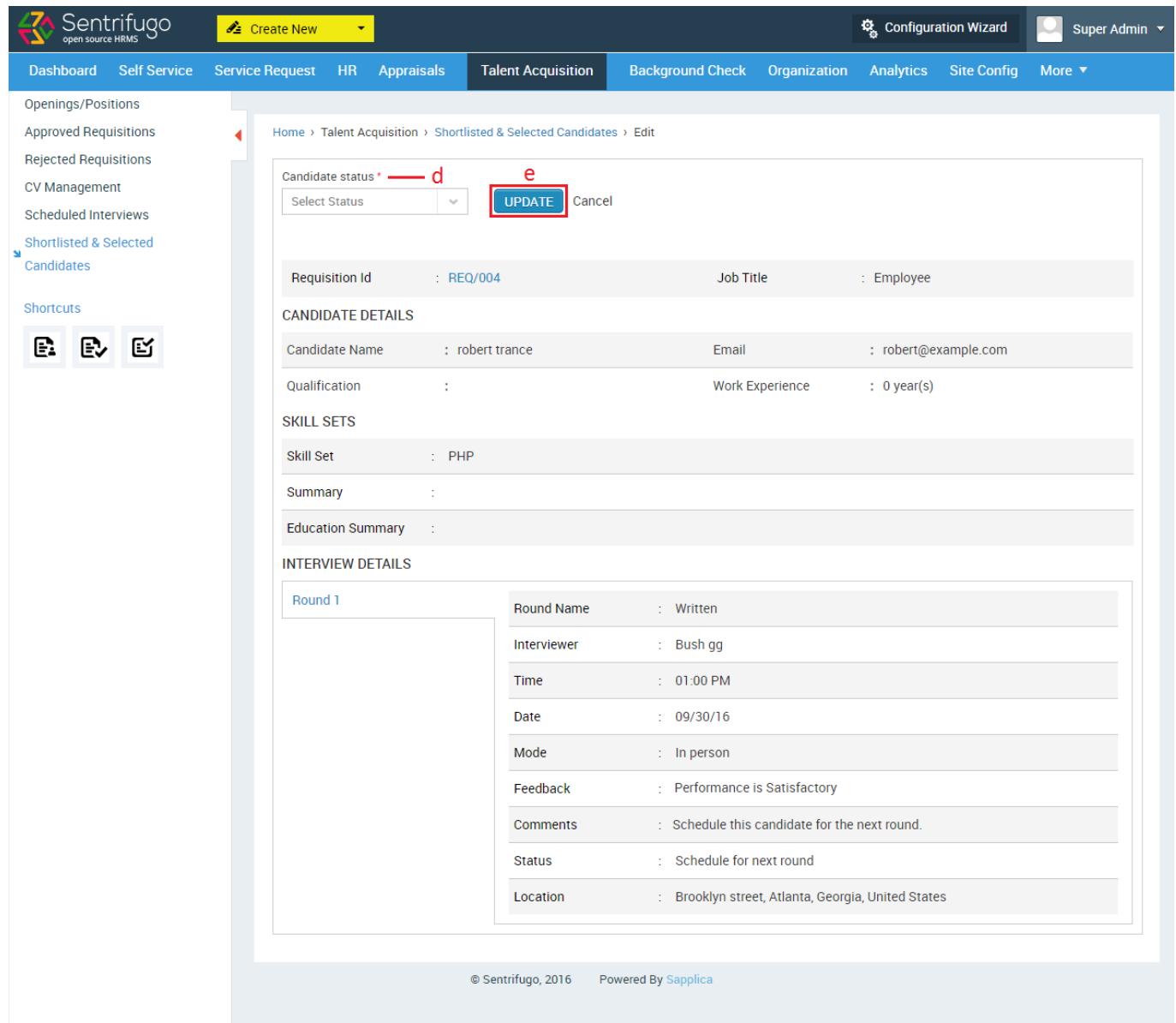


The screenshot shows the Talent Acquisition module's 'Shortlisted & Selected Candidates' list screen. The top navigation bar includes tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition (highlighted in red), Background Check, Organization, Analytics, Site Config, More, Configuration Wizard, and Super Admin. A sidebar on the left lists Openings/Positions, Approved Requisitions, Rejected Requisitions, CV Management, Scheduled Interviews, and Shortlisted & Selected Candidates (highlighted with a red box). The main content area displays four counts: All Candidates (1), Shortlisted Candidates (1), Selected Candidates (0), and Rejected Candidates (0). Below this is a table titled 'Shortlisted & Selected Candidates' with one row: Action (Edit icon with a red box), Requisition Code (REQ/004), Job Title (Employee), Candidate Name (robert trance), Email (robert@example.com), Contact Number (1234567988), and Status (Shortlisted). A red box highlights the 'Edit' icon in the table's Action column. The bottom of the page has a 'Records per page' dropdown set to 20.

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 Sentrifugo Talent Acquisition interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition (which is currently selected), Background Check, Organization, Analytics, Site Config, and More. On the far right, there are Configuration Wizard and Super Admin dropdown menus. The left sidebar has links for Openings/Positions, Approved Requisitions, Rejected Requisitions, CV Management, Scheduled Interviews, and Shortlisted & Selected Candidates (which is also selected). Under Shortcuts, there are three icons. The main content area shows a breadcrumb path: Home > Talent Acquisition > Shortlisted & Selected Candidates > Edit. A modal window is open, titled 'Edit'. It contains a 'Candidate status*' field with a dropdown menu labeled 'Select Status' (marked with a red arrow 'd') and a blue 'UPDATE' button (marked with a red box 'e'). Below the modal, the requisition details are listed: Requisition Id : REQ/004, Job Title : Employee. The 'CANDIDATE DETAILS' section includes Candidate Name : robert trance, Email : robert@example.com, Qualification : , Work Experience : 0 year(s). The 'SKILL SETS' section lists Skill Set : PHP. The 'Summary' and 'Education Summary' fields are empty. The 'INTERVIEW DETAILS' section shows a table for 'Round 1' with the following data:

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

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

Figure 112

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

7.7 How do I add a Candidate as an Employee?

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

Please refer Figure 113

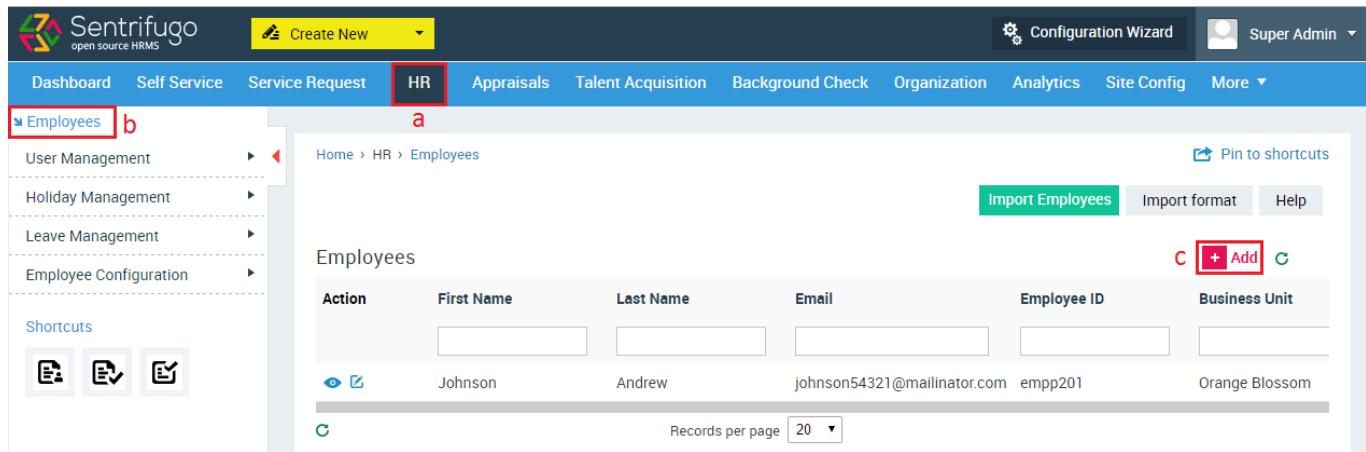
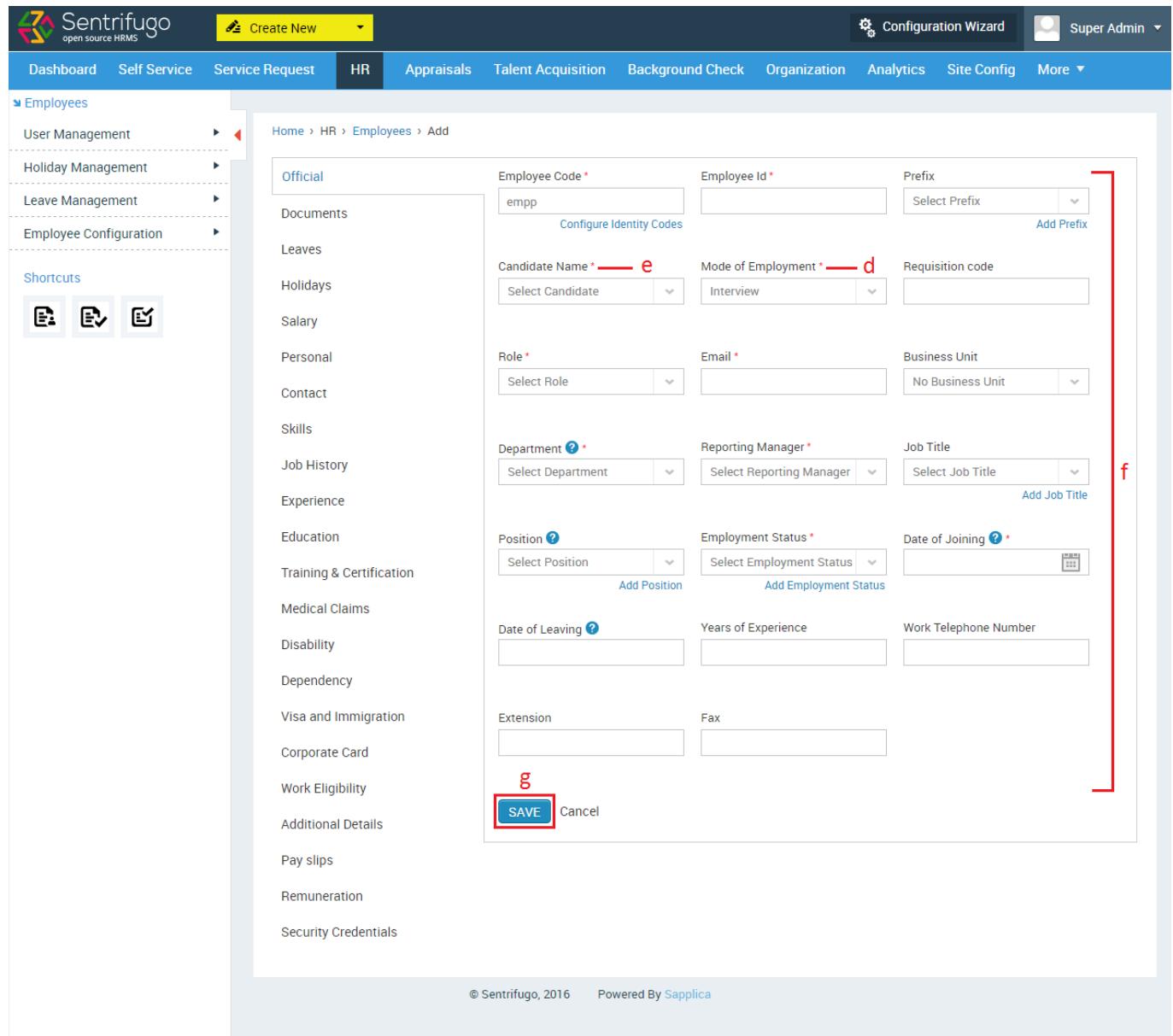


Figure 113

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

Please refer Figure 114



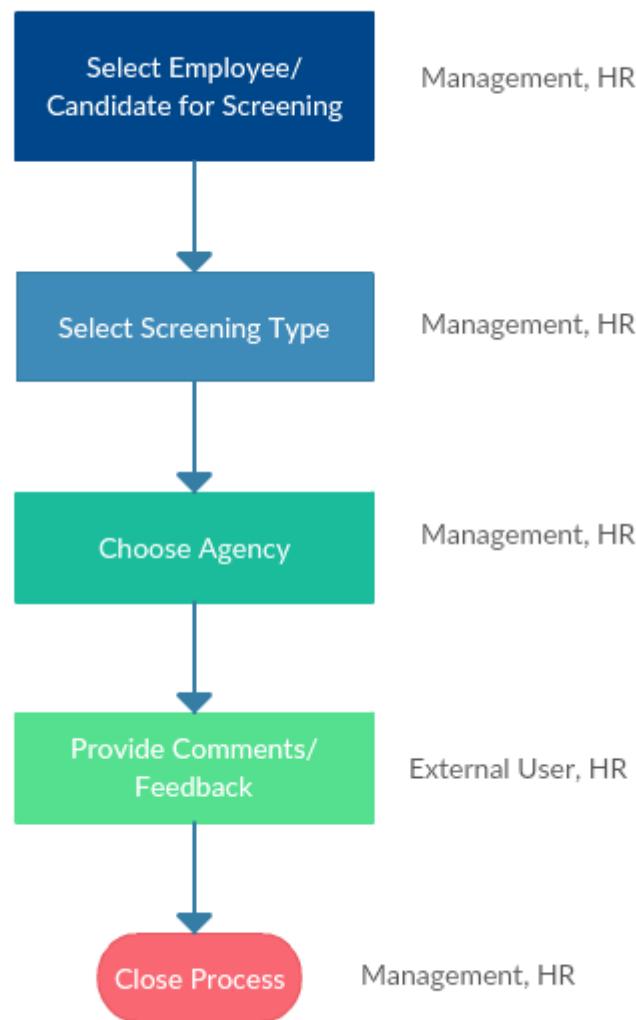
The screenshot shows the Sentrifugo HRM system interface for adding a new employee. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. The left sidebar under 'Employees' contains links for User Management, Holiday Management, Leave Management, Employee Configuration, and various shortcuts. The main form is titled 'Add' and includes fields for Employee Code (empp), Employee Id, Prefix, Candidate Name (with a dropdown labeled 'e'), Mode of Employment (with a dropdown labeled 'd'), Requisition code, Role, Email, Business Unit, Department, Reporting Manager, Job Title, Position, Employment Status, Date of Joining (with a calendar icon labeled 'f'), Date of Leaving, Years of Experience, Work Telephone Number, Extension, and Fax. At the bottom are 'SAVE' and 'Cancel' buttons, with the 'SAVE' button highlighted by a red box and labeled 'g'.

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.



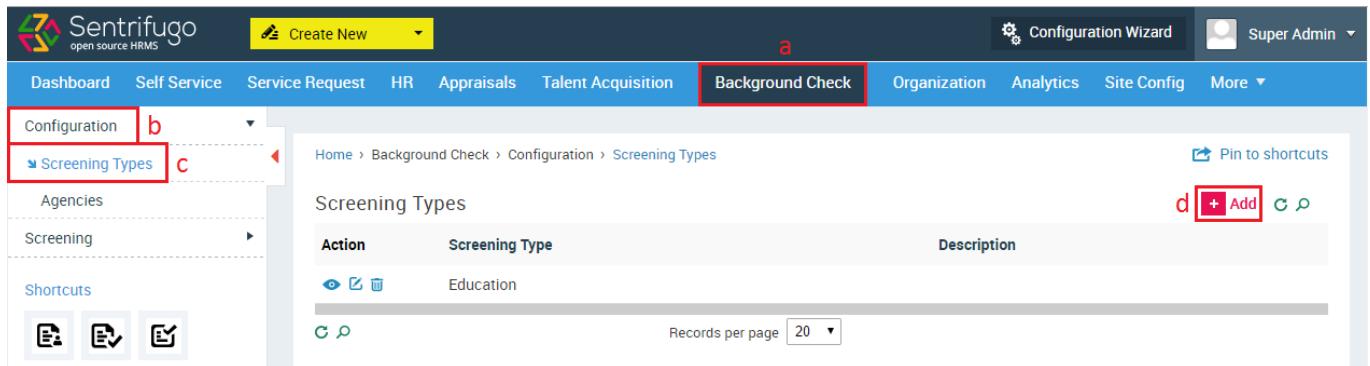
Description:

- 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

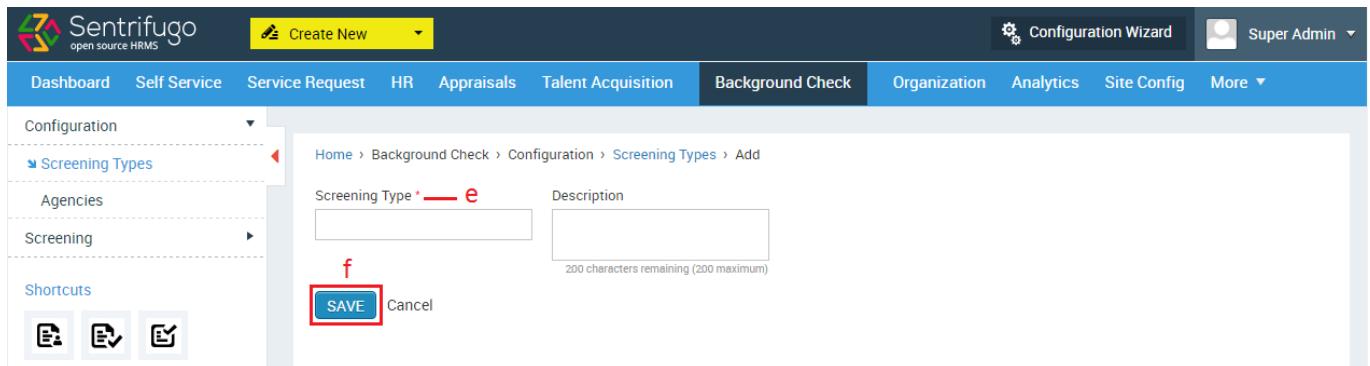


The screenshot shows the Sentrifugo application interface. The top navigation bar includes links for Create New, Configuration Wizard, Super Admin, Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check (which is highlighted with a red box), Organization, Analytics, Site Config, and More. On the left, a sidebar menu has 'Configuration' expanded, with 'Screening Types' selected (also highlighted with a red box). The main content area displays a table titled 'Screening Types' with one row: 'Action' (with icons for eye, edit, and delete), 'Screening Type' (Education), and 'Description'. A red box labeled 'd' points to the '+ Add' button in the top right corner of the table header. The URL in the browser is Home > Background Check > Configuration > Screening Types.

Figure 115

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

Please refer Figure 116



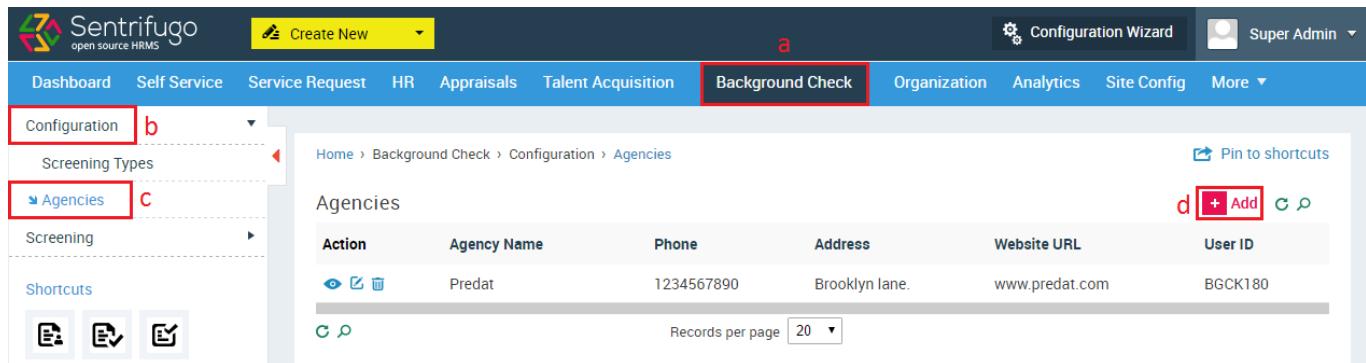
The screenshot shows the Sentrifugo application interface. The top navigation bar and sidebar are identical to Figure 115. The main content area shows a form titled 'Screening Type *' (with a red box labeled 'e' over it) and 'Description'. Below the form are buttons for 'SAVE' (with a red box labeled 'f' over it) and 'Cancel'. The URL in the browser is Home > Background Check > Configuration > Screening Types > Add.

Figure 116

- Enter the required details
- 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 State	Select City	Contact type *
	Add State	Add City	Primary

Contact type * — g

Select Role

h

SAVE Cancel

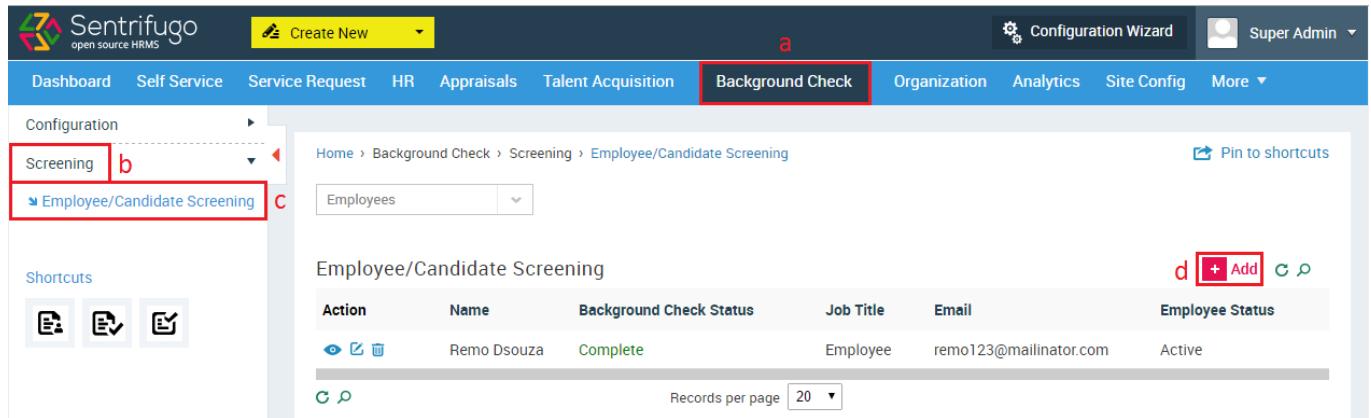
© Sentrifugo, 2016 Powered By Sapplica

Figure 118

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

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

Please refer Figure 119



The screenshot shows the Sentrifugo open source HRMS application. The top navigation bar includes a logo, a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. The main menu has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, **Background Check** (which is highlighted with a red box), Organization, Analytics, Site Config, and More. A left sidebar titled 'Configuration' has a 'Screening' section with a 'Employee/Candidate Screening' item (also highlighted with a red box). The main content area shows a breadcrumb path: Home > Background Check > Screening > Employee/Candidate Screening. A dropdown menu shows 'Employees'. Below is a table titled 'Employee/Candidate Screening' with one row:

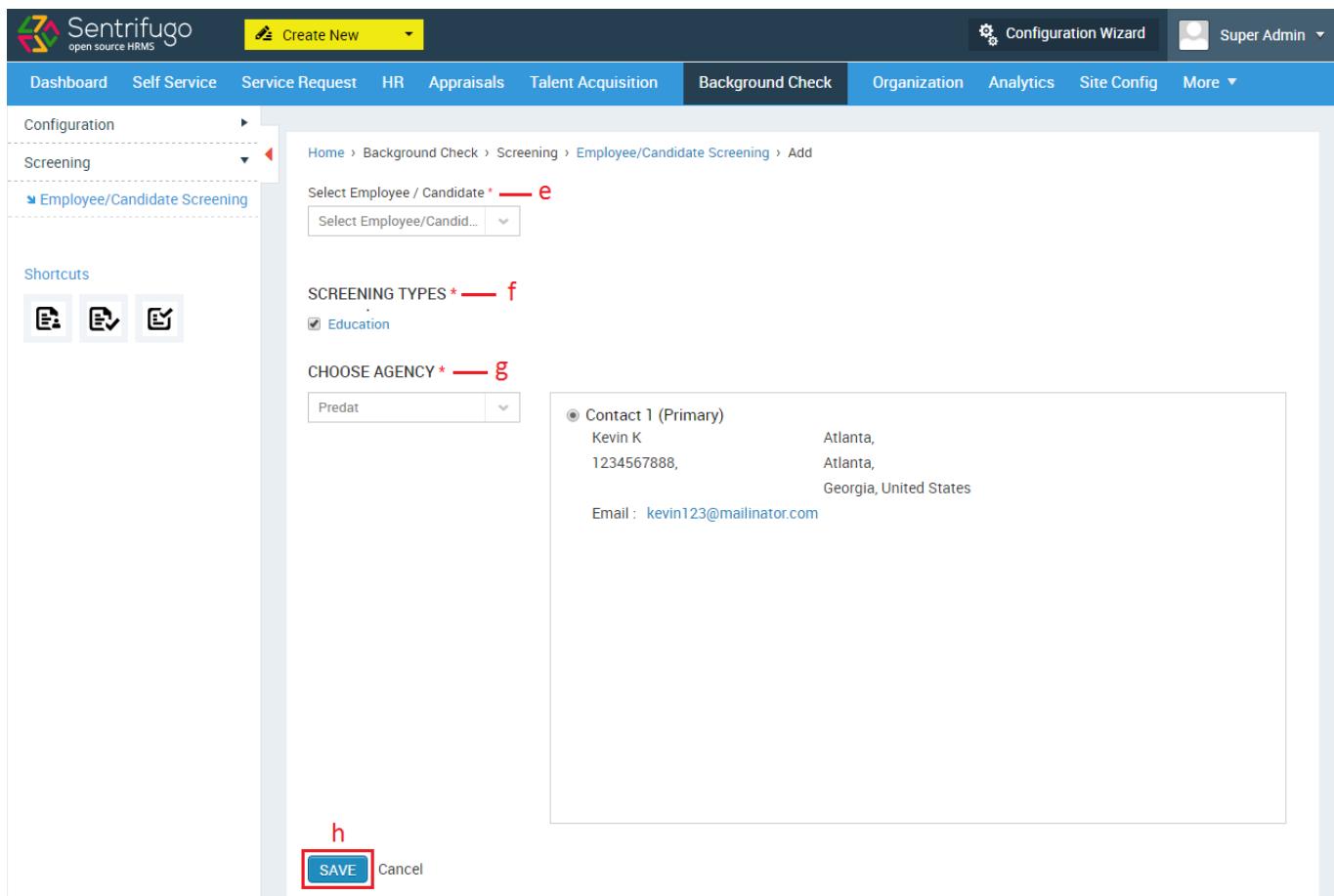
Action	Name	Background Check Status	Job Title	Email	Employee Status
	Remo Dsouza	Complete	Employee	remo123@mailinator.com	Active

Buttons for '+Add' and 'Print' are visible on the right. A 'Records per page' dropdown is set to 20.

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



Configuration

Screening

Employee/Candidate Screening

Shortcuts

Create New

Configuration Wizard

Super Admin

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

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
 1234567888,
 Atlanta,
 Atlanta,
 Georgia, United States
 Email : kevin123@mailinator.com

h

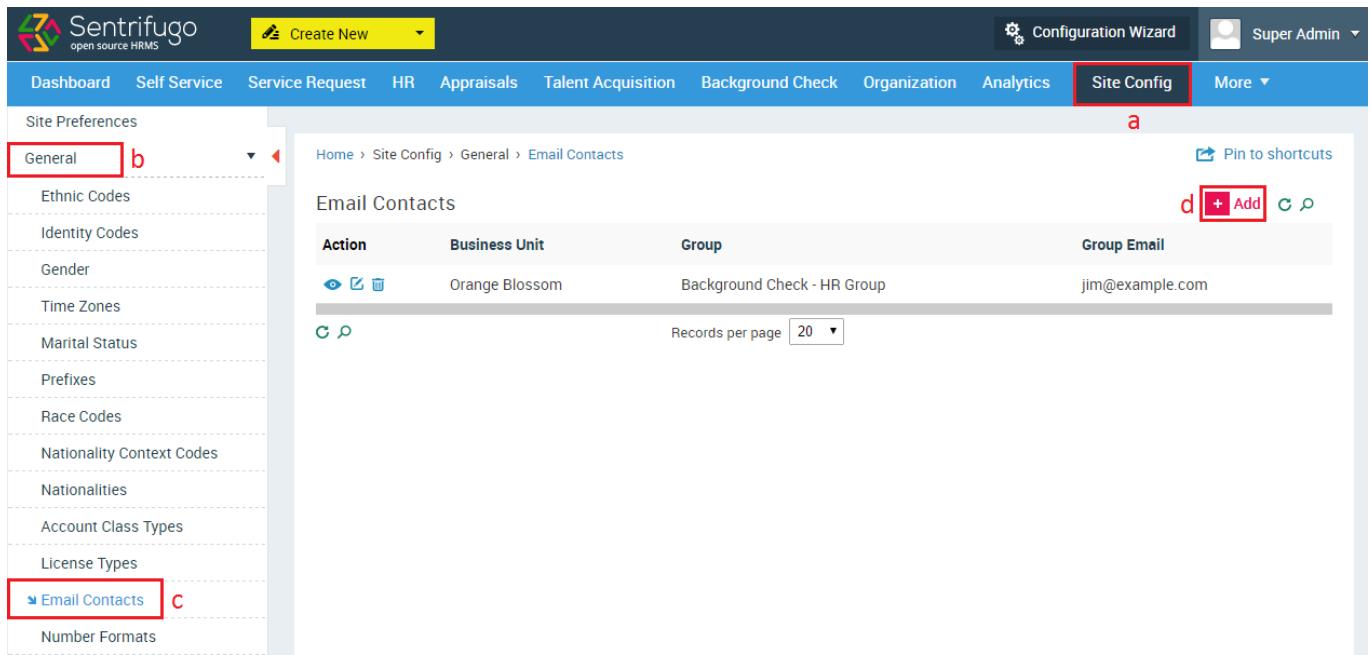
SAVE Cancel

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



The screenshot shows the Sentrifugo web 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 links for Configuration Wizard, Super Admin, and a user profile icon.

The main content area has a left sidebar titled "Site Preferences" with a list of categories: General (highlighted with a red box and labeled 'b'), Ethnic Codes, Identity Codes, Gender, Time Zones, Marital Status, Prefixes, Race Codes, Nationality Context Codes, Nationalities, Account Class Types, License Types, Email Contacts (highlighted with a red box and labeled 'c'), and Number Formats.

The main panel displays the "Email Contacts" section under "General". It includes a breadcrumb trail: Home > Site Config > General > Email Contacts. There is a "Pin to shortcuts" link and a "Search" icon. A table lists an email contact entry:

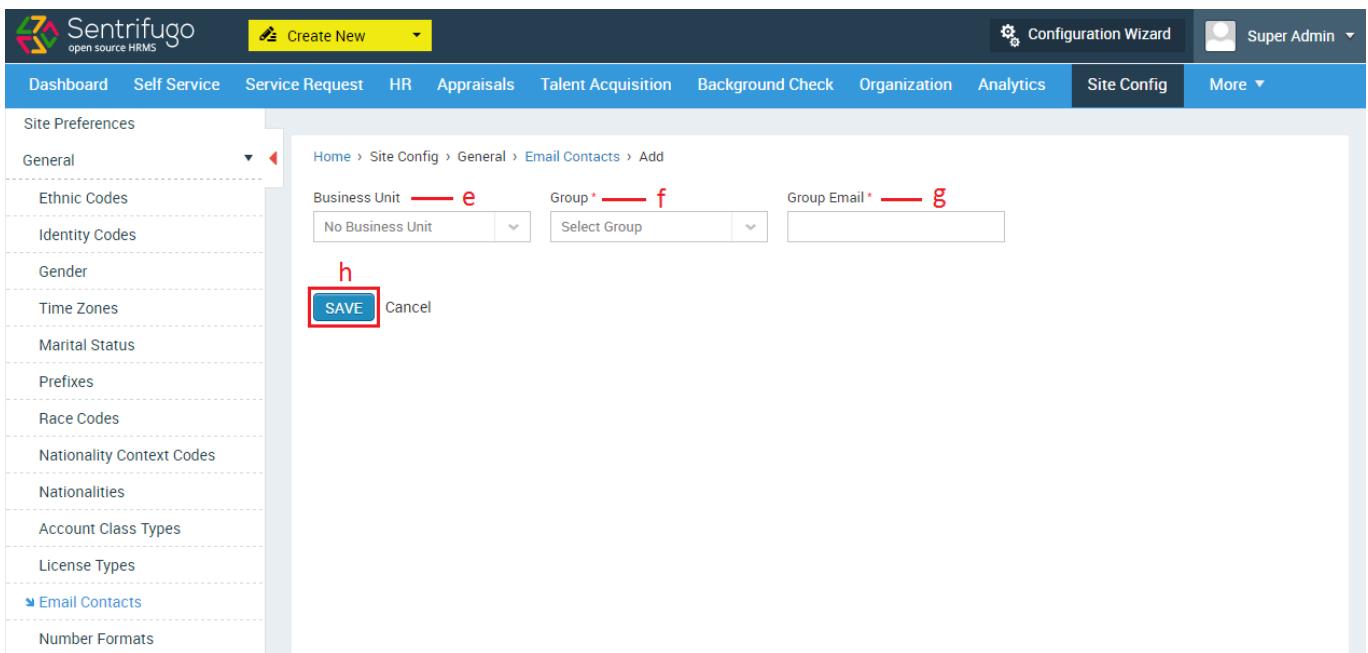
Action	Business Unit	Group	Group Email
	Orange Blossom	Background Check - HR Group	jim@example.com

Below the table are "Records per page" dropdown and search/filter icons.

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



Business Unit — e Group * — f Group Email * — g

h SAVE Cancel

Figure 122

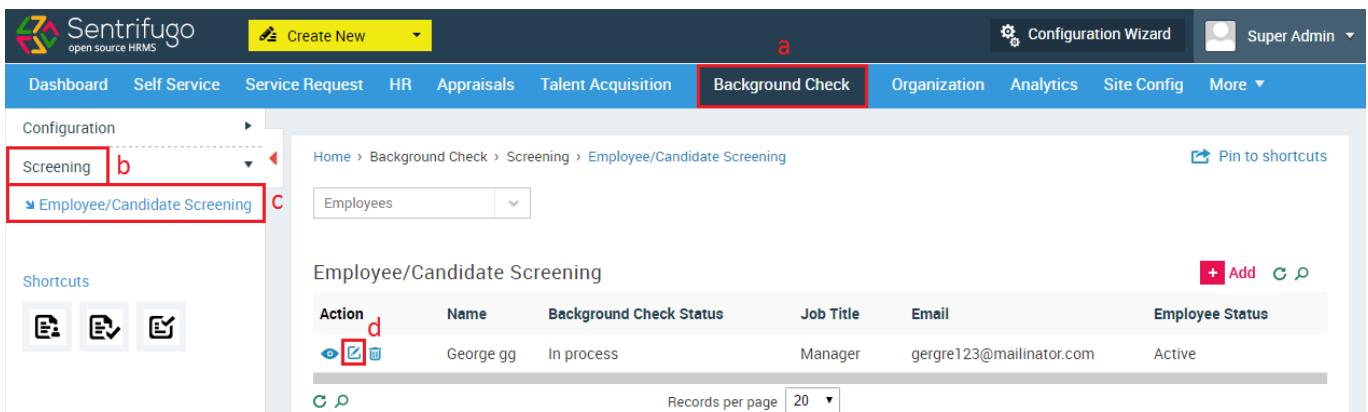
- e. Select the business unit the HR group
- f. Select 'Background Check – HR Group' (HR)/ 'Background Check' Management Group (Management)
- g. Enter group email id
- h. Click **SAVE** button



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



a

b

c

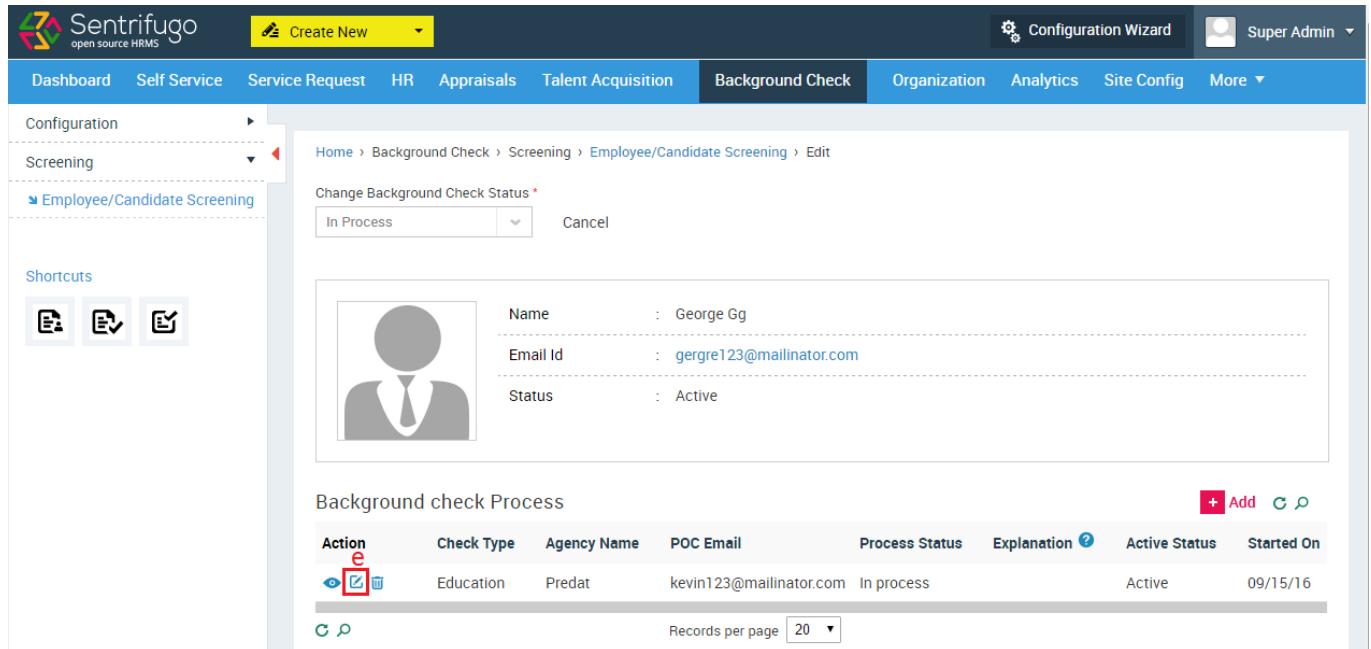
d

Action	Name	Background Check Status	Job Title	Email	Employee Status
	George gg	In process	Manager	gerger123@mailinator.com	Active

Figure 123

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

Please refer Figure 124



The screenshot shows the Sentrifugo open source HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check (which is highlighted), Organization, Analytics, Site Config, and More. On the far right, there are Configuration Wizard, Super Admin, and other user-related icons.

The left sidebar has sections for Configuration, Screening, and Employee/Candidate Screening (which is expanded). Below these are Shortcuts with icons for Create New, Edit, and Delete.

The main content area shows a breadcrumb path: Home > Background Check > Screening > Employee/Candidate Screening > Edit. A modal window titled "Change Background Check Status" is open, showing a dropdown set to "In Process" and a "Cancel" button.

Below the modal is a detailed view of an employee/candidate record:

	Name : George Gg
Email Id :	gegrge123@mailinator.com
Status :	Active

At the bottom of this section is a "Background check Process" grid:

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

Below the grid are buttons for "+ Add", "Search", and "Print". The footer of the grid shows "Records per page" set to 20.

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	<input type="button" value="▼"/>
------------	----------------------------------

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  **g**

ENTER COMMENTS / FEEDBACK  

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

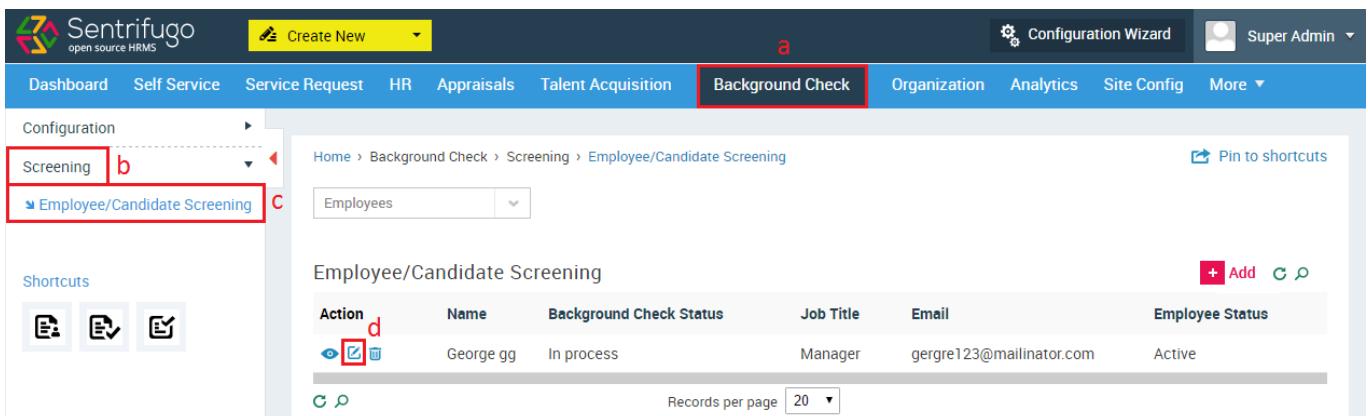


Figure 126

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

Please refer Figure 127

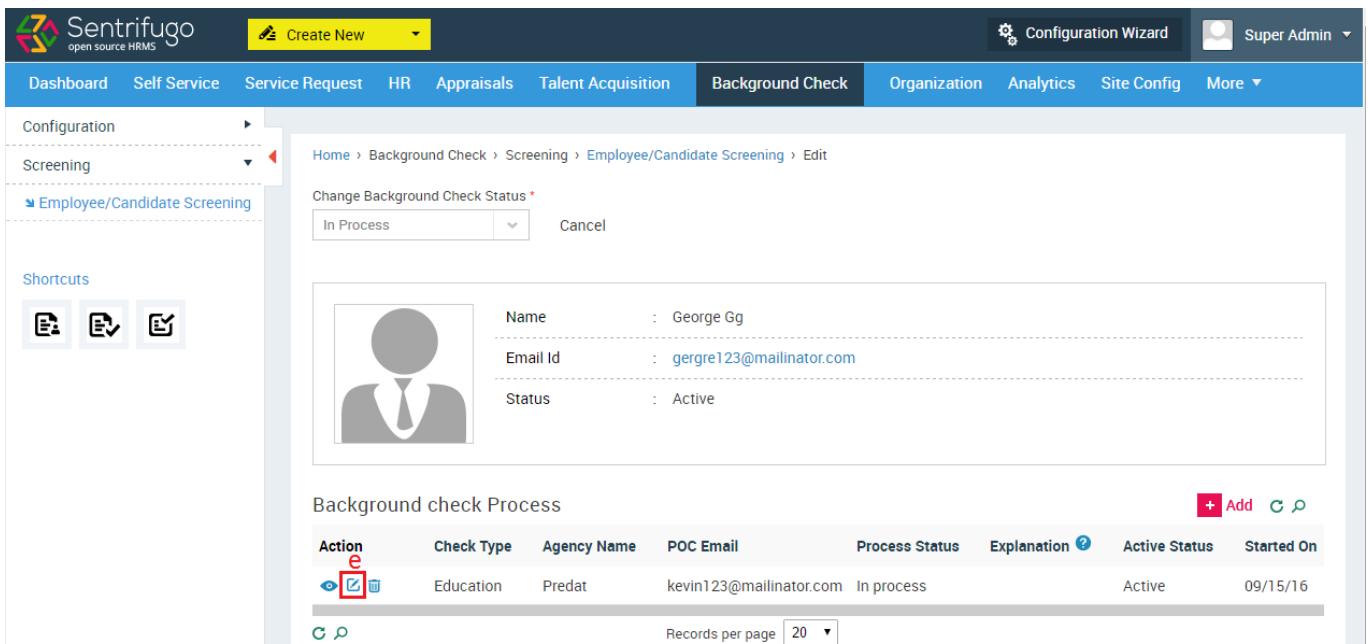


Figure 127

To close a specific Background process:

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

Please refer Figure 128

Background check Process

Change Background Check Status * —— **g**

Complete

SAVE h

UPLOAD FEEDBACK DOCUMENT ? —— **f**

Upload Feedback File

SAVE

AGENCY & POC DETAILS

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

CLOSE

ENTER COMMENTS / FEEDBACK

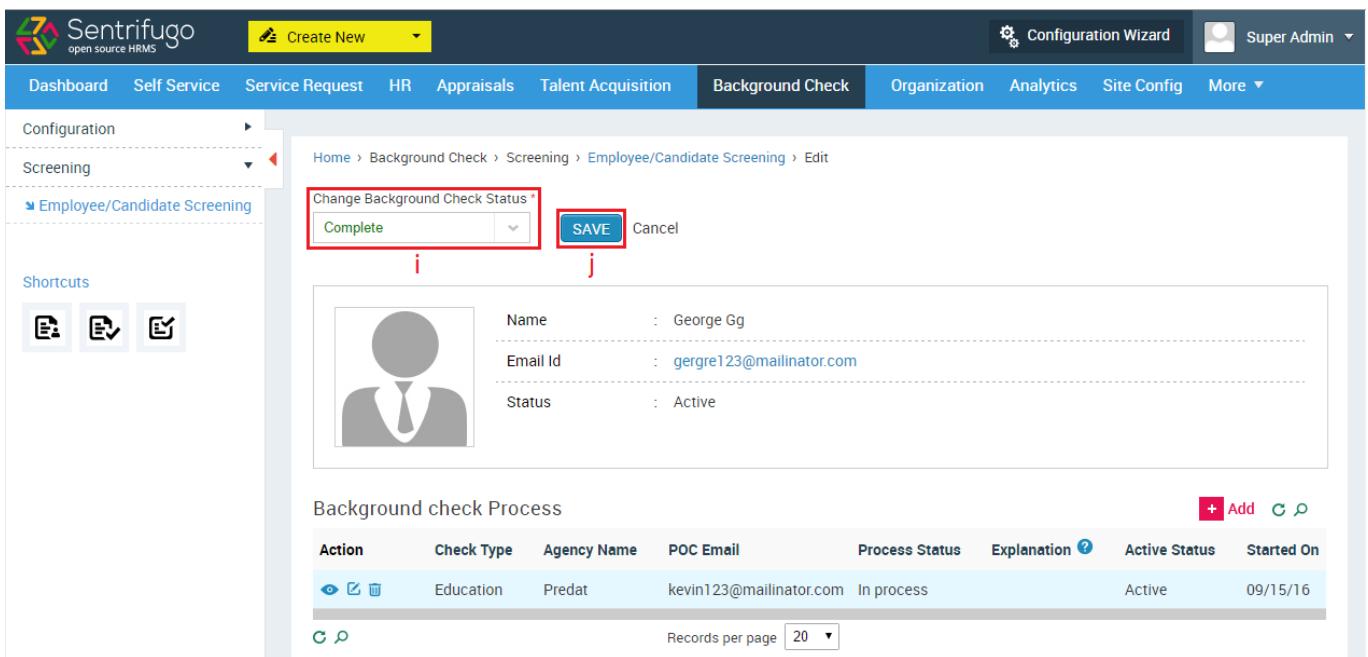
POST

No comments posted

Figure 128

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

Please refer Figure 129



The screenshot shows the Sentrifugo HRMS application interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check (which is currently selected), Organization, Analytics, Site Config, More, Configuration Wizard, and Super Admin.

The main content area shows a sub-navigation path: Home > Background Check > Screening > Employee/Candidate Screening > Edit. A modal window titled "Change Background Check Status" is open, with a dropdown menu set to "Complete" and a blue "SAVE" button highlighted with a red box. Below the modal, there is a summary card for an employee named George Gg, showing details like Name: George Gg, Email Id: gergre123@mailinator.com, and Status: Active. To the left of the summary card is a placeholder icon for a profile picture.

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

Figure 130

To close all Background processes for an employee:

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

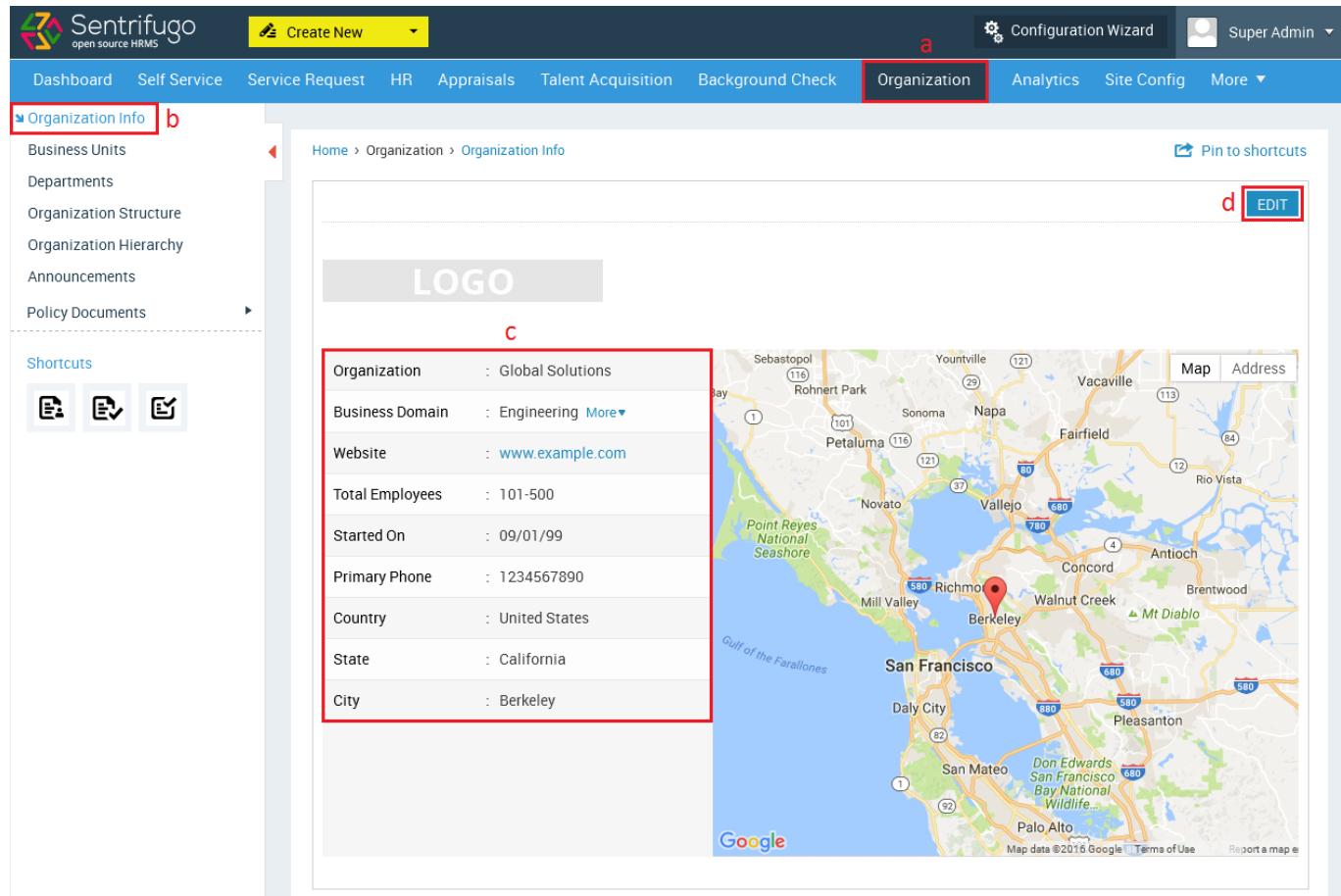
9. Organization

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

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

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

Please refer Figure 131



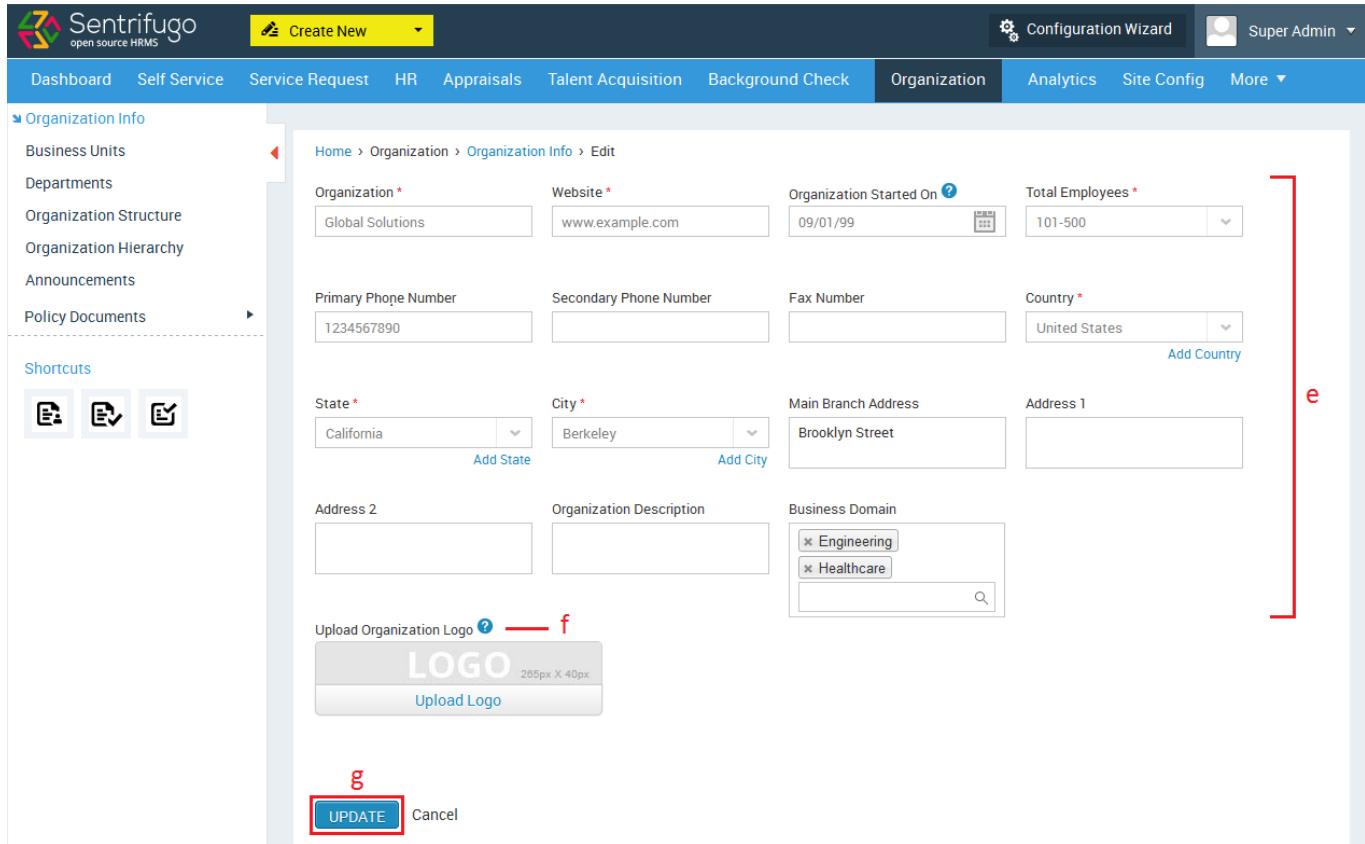
The screenshot shows the Sentrifugo application interface. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, **Organization**, Analytics, Site Config, and More. The 'Organization' link is highlighted with a red box and labeled 'a'. On the left, a sidebar has a 'Organization Info' link, which is also highlighted with a red box and labeled 'b'. The main content area shows a map of the San Francisco Bay Area with a red pin marking Berkeley. To the left of the map is a box containing organization details, which is also highlighted with a red box and labeled 'c'. At the top right of the main content area is an 'EDIT' button, which is highlighted with a red box and labeled 'd'.

Organization	:	Global Solutions
Business Domain	:	Engineering More▼
Website	:	www.example.com
Total Employees	:	101-500
Started On	:	09/01/99
Primary Phone	:	1234567890
Country	:	United States
State	:	California
City	:	Berkeley

Figure 131

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

Please refer Figure 132



The screenshot shows the 'Organization Info' edit page. The left sidebar includes links for Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, and Policy Documents. The main form fields include:

- Organization**: Global Solutions
- Website**: www.example.com
- Organization Started On**: 09/01/99
- Total Employees**: 101-500
- Primary Phone Number**: 1234567890
- Secondary Phone Number**: (empty)
- Fax Number**: (empty)
- Country**: United States
- State**: California
- City**: Berkeley
- Main Branch Address**: Brooklyn Street
- Address 1**: (empty)
- Address 2**: (empty)
- Organization Description**: (empty)
- Business Domain**: Engineering, Healthcare

At the bottom, there is a logo upload section with a placeholder 'LOGO 285px X 40px' and a 'Upload Logo' button. The 'UPDATE' button is highlighted with a red box.

Figure 132

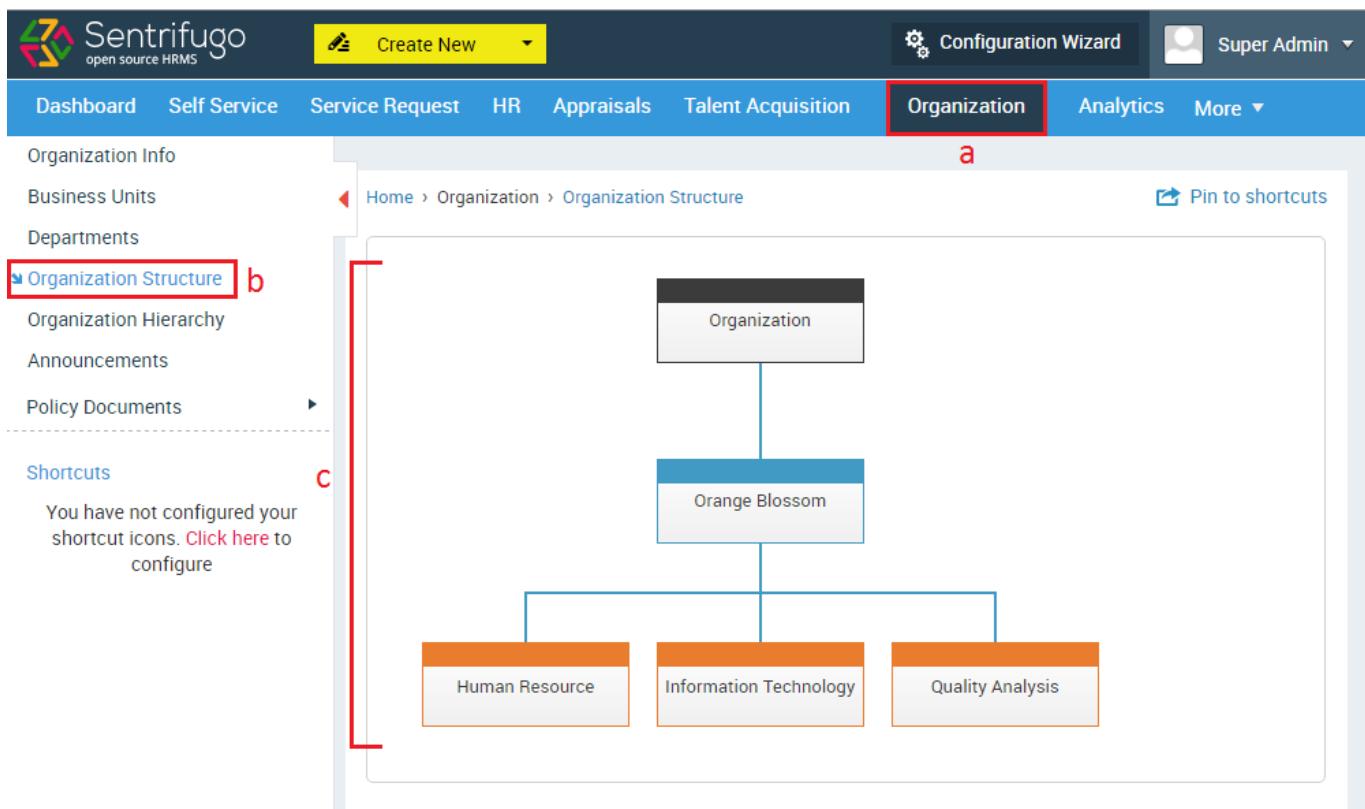
- e. Enter or modify details
- f. You can change your company logo
- g. Click **UPDATE** button

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 the following items: Sentrifugo open source HRMS, Create New (with a dropdown arrow), Configuration Wizard, Super Admin (with a dropdown arrow), Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Organization (which is highlighted with a red border), Analytics, and More. Below the navigation bar is a sidebar on the left with the following sections: Organization Info, Business Units, Departments, Organization Structure (which is highlighted with a red border and labeled 'b'), Organization Hierarchy, Announcements, Policy Documents, and Shortcuts. The Shortcuts section contains a message: "You have not configured your shortcut icons. Click here to configure". To the right of the sidebar is the main content area, which displays the organization structure as a hierarchical tree. The root node is "Organization", which branches down to "Orange Blossom". "Orange Blossom" further branches down to three departments: "Human Resource", "Information Technology", and "Quality Analysis". The main content area also includes a breadcrumb trail: Home > Organization > Organization Structure, and a "Pin to shortcuts" button.

Figure 133

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



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

9.3 How do I view my Organization Hierarchy?

Please refer Figure 134

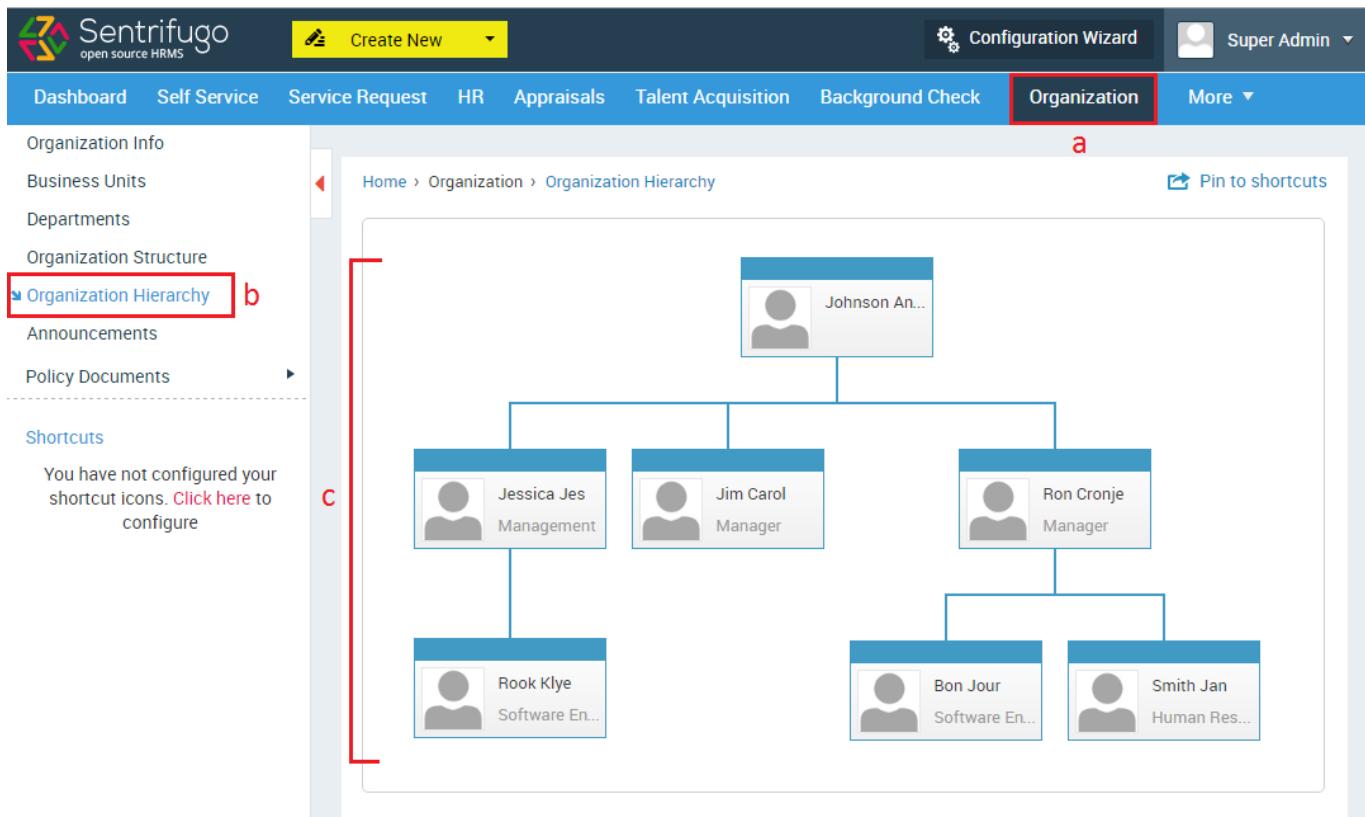


Figure 134

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



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

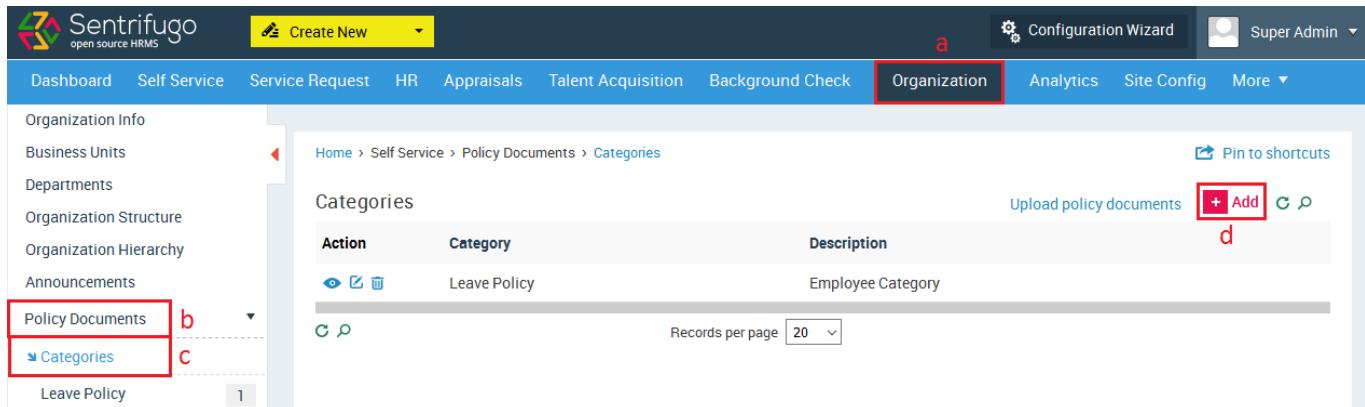
9.4 How do I add Announcements?

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

9.5 How do I add Policy Documents?

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

Please refer Figure 135

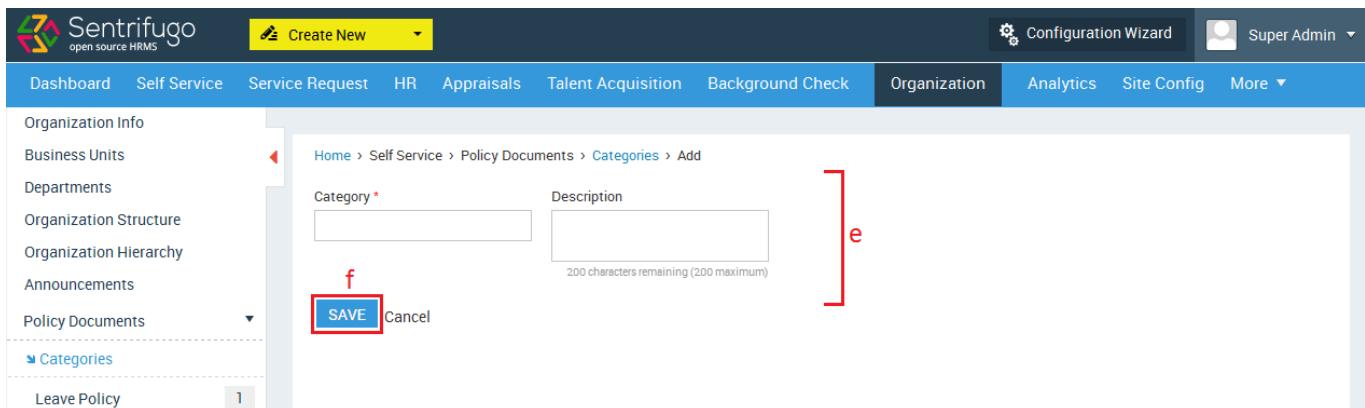


The screenshot shows the Sentrifugo web application interface. At the top, there is a navigation bar with various menu items like Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. The 'Organization' menu item is highlighted with a red box (a). On the left side, there is a sidebar with links for Organization Info, Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, Policy Documents (highlighted with a red box b), Categories (highlighted with a red box c), and Leave Policy. The main content area shows a breadcrumb path: Home > Self Service > Policy Documents > Categories. It displays a table with columns Action, Category, and Description. There is one row with 'Leave Policy' in the Category column and 'Employee Category' in the Description column. There are also icons for eye, edit, and delete. Below the table, there is a link 'Upload policy documents' and a '+ Add' button (highlighted with a red box d). At the bottom, there is a 'Records per page' dropdown set to 20 and a 'C' icon.

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' page for a new Policy Document category. The left sidebar is identical to Figure 135. The main content area has a breadcrumb path: Home > Self Service > Policy Documents > Categories > Add. It contains two input fields: 'Category *' and 'Description'. The 'Category *' field is highlighted with a red box (e). The 'Description' field has a note '200 characters remaining (200 maximum)'. At the bottom, there is a 'SAVE' button (highlighted with a red box f) and a 'Cancel' link.

Figure 136

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

Please refer Figure 137

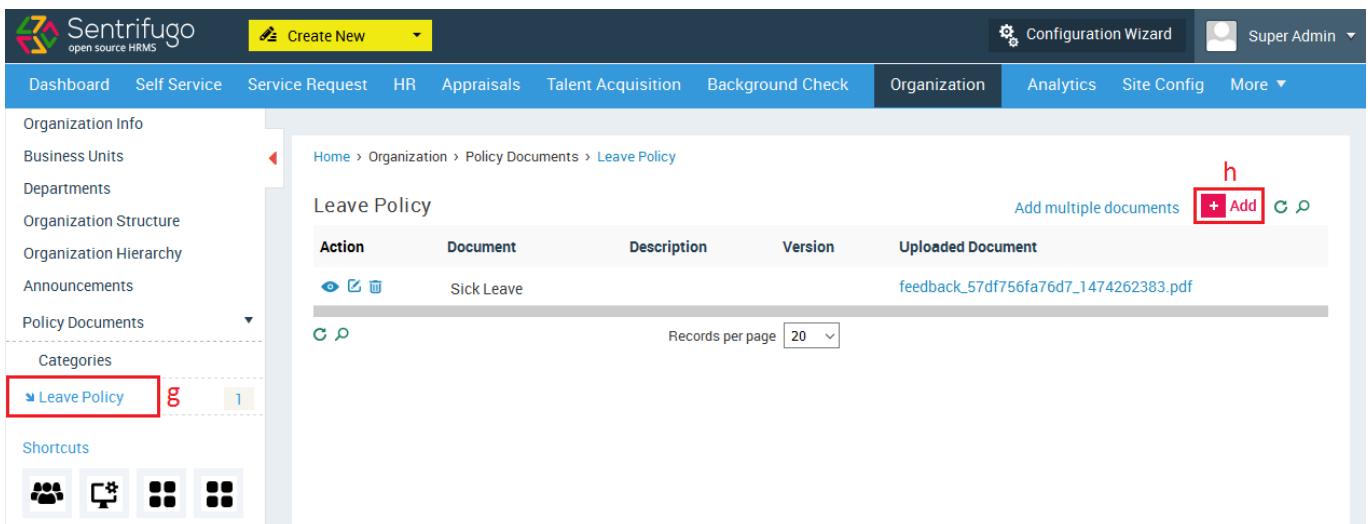


Figure 137

- 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

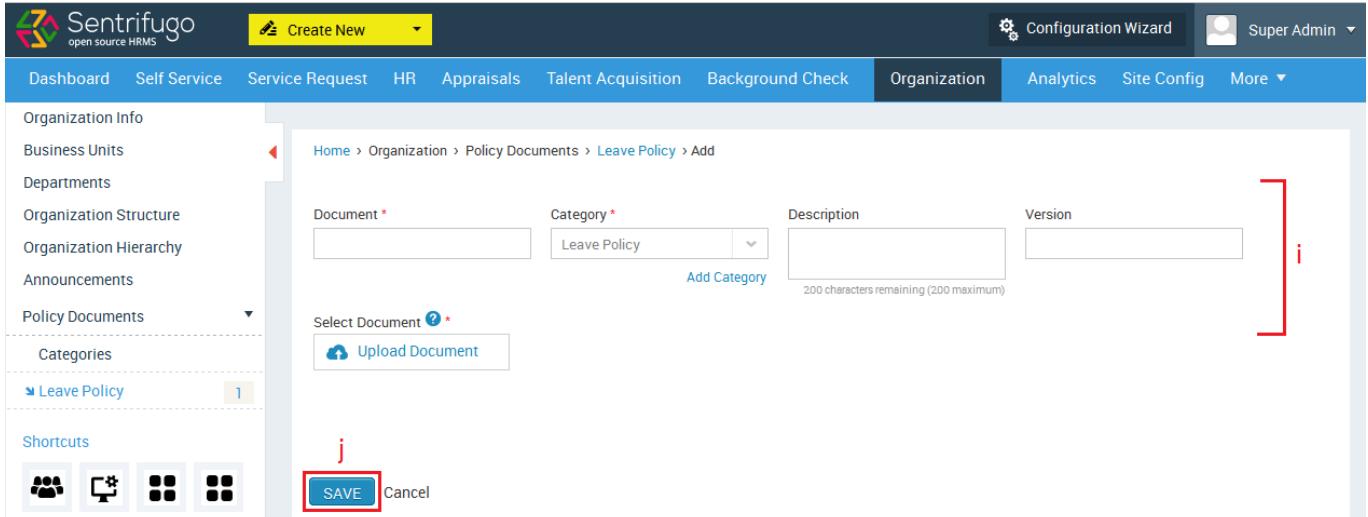


Figure 138

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

9.6 How do I view Policy Documents?

Please refer Figure 139

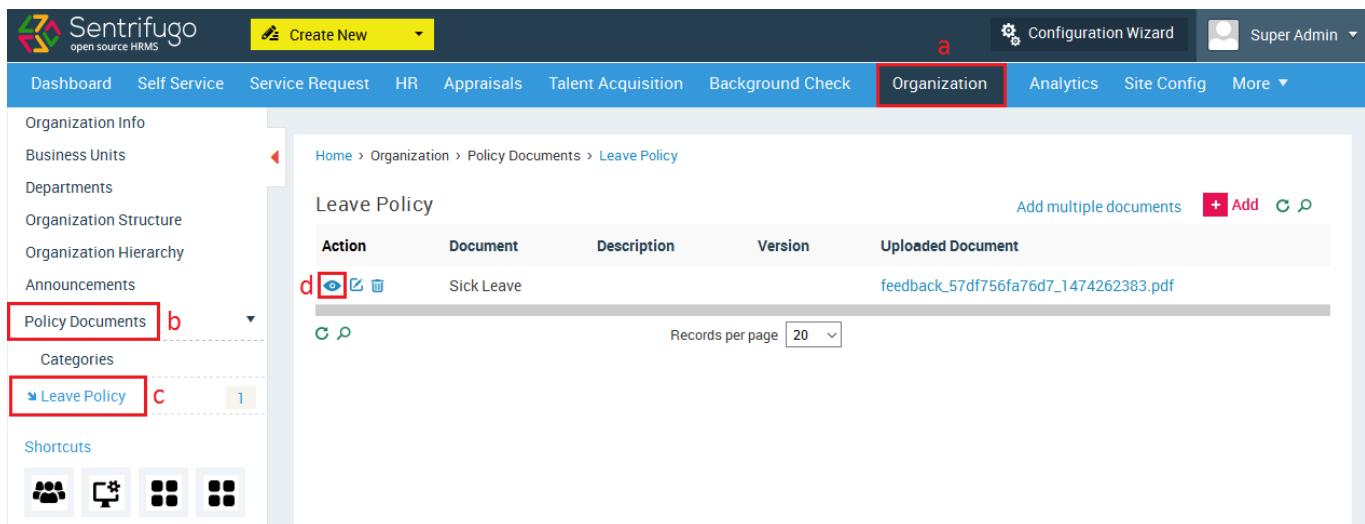


Figure 139

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



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

10. Analytics

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

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

10.1 How do I view/generate Reports?

Please refer Figure 140

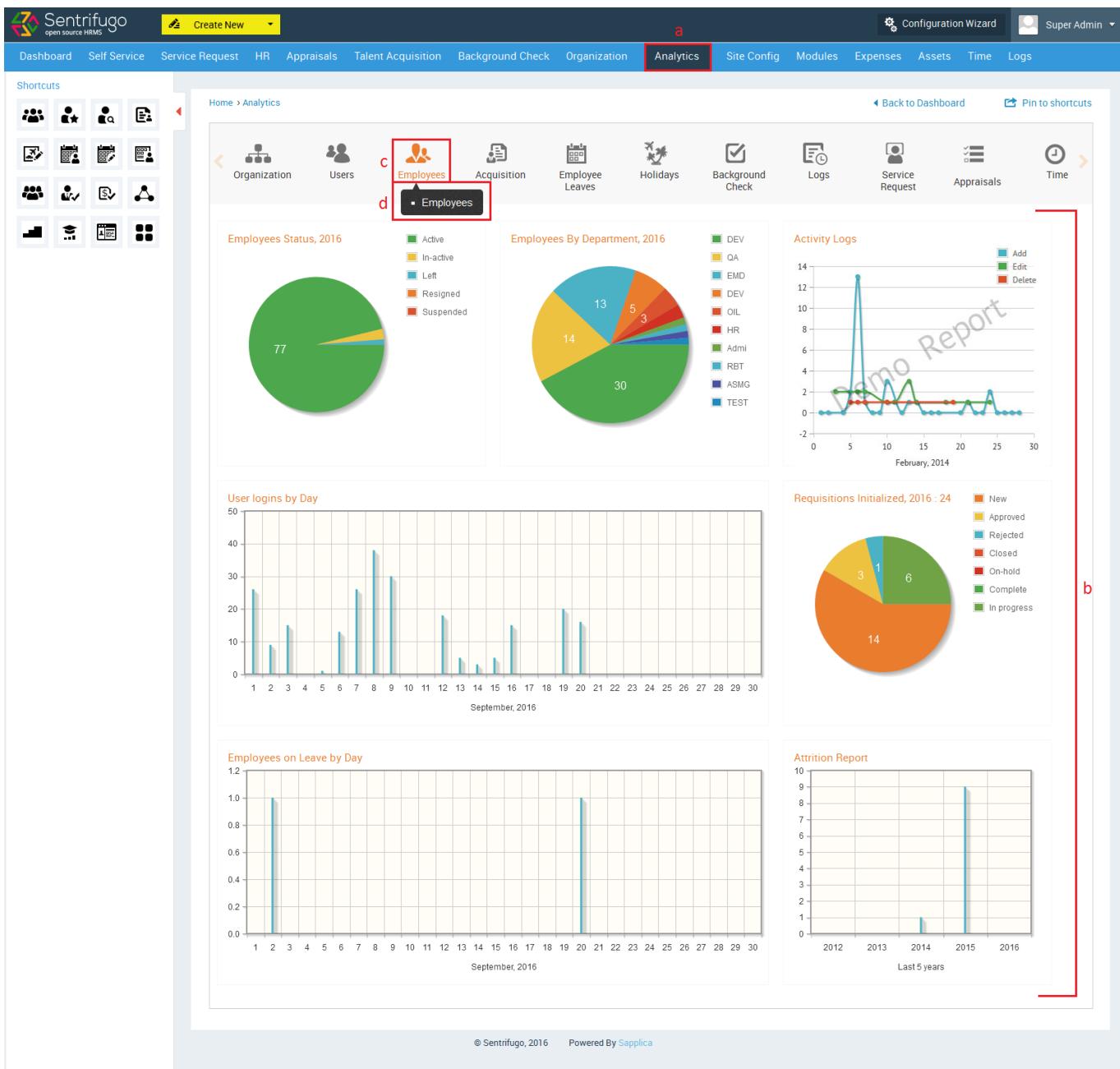
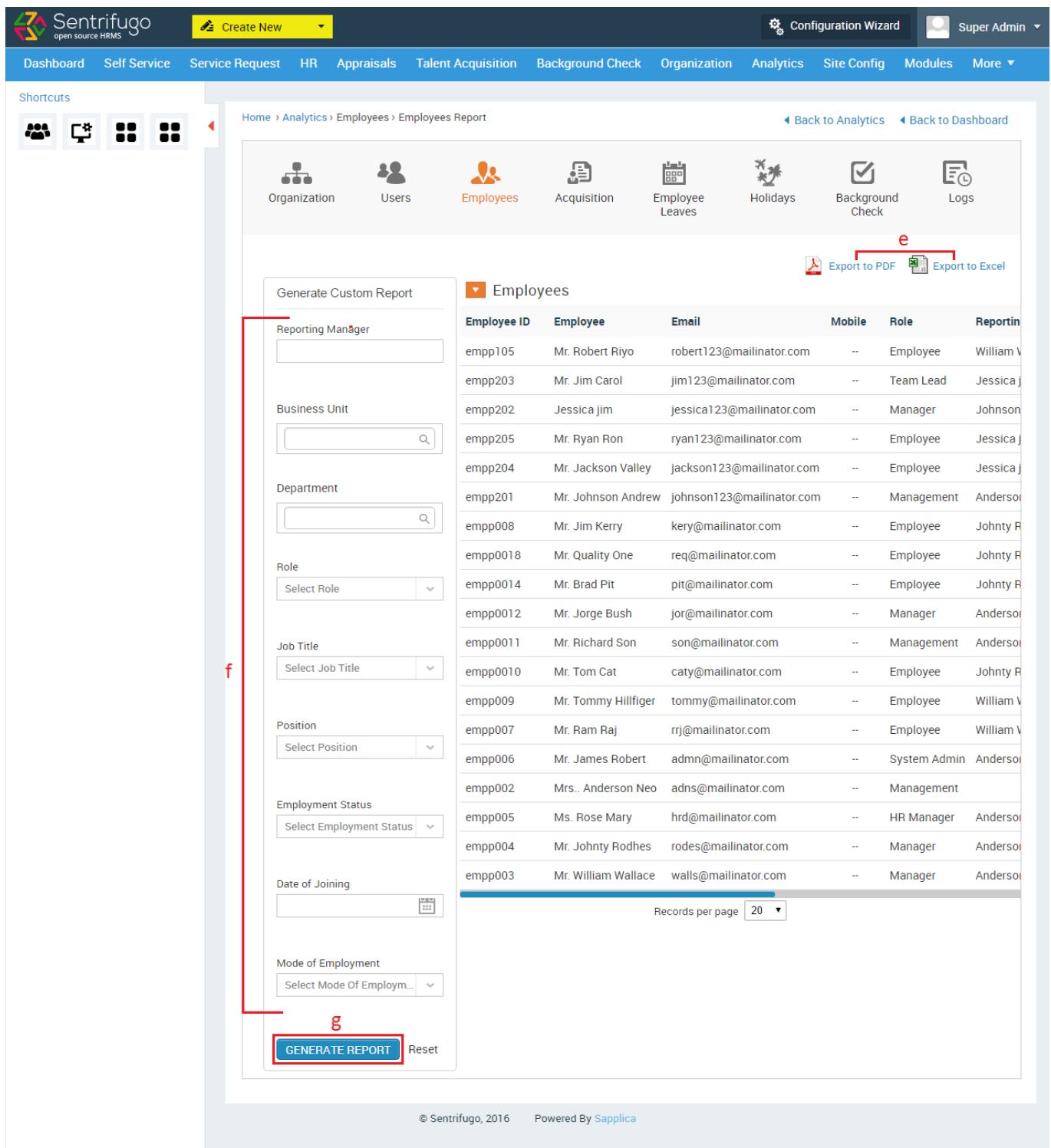


Figure 140

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

Please refer Figure 141



The screenshot shows the Sentrifugo HRMS 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 links for Configuration Wizard, Super Admin, and a user profile. Below the navigation bar, there is a 'Shortcuts' section with icons for Organization, Users, Employees (highlighted in orange), Acquisition, Employee Leaves, Holidays, Background Check, and Logs.

The main content area displays a report titled 'Employees'. It includes a table with columns for Employee ID, Employee, Email, Mobile, Role, and Reporting. There are 20 records listed. Above the table, there are several filter options: Reporting Manager, Business Unit, Department, Role, Job Title, Position, Employment Status, Date of Joining, and Mode of Employment. At the bottom of the filter section, there is a 'GENERATE REPORT' button.

At the bottom of the page, there are copyright and power information: © 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

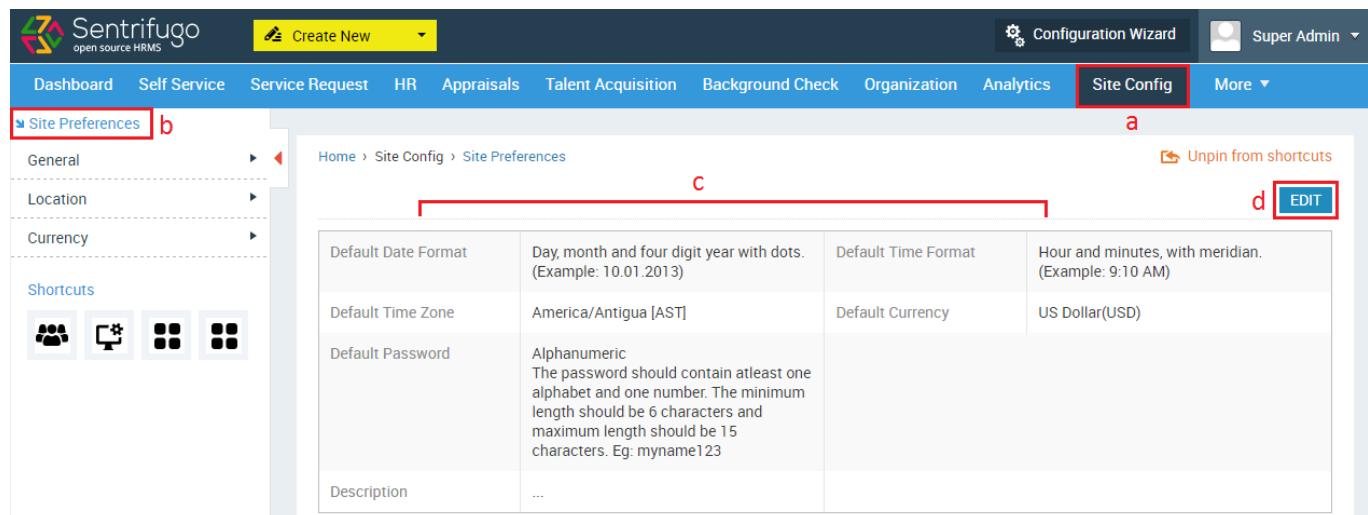
11. Site Config

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

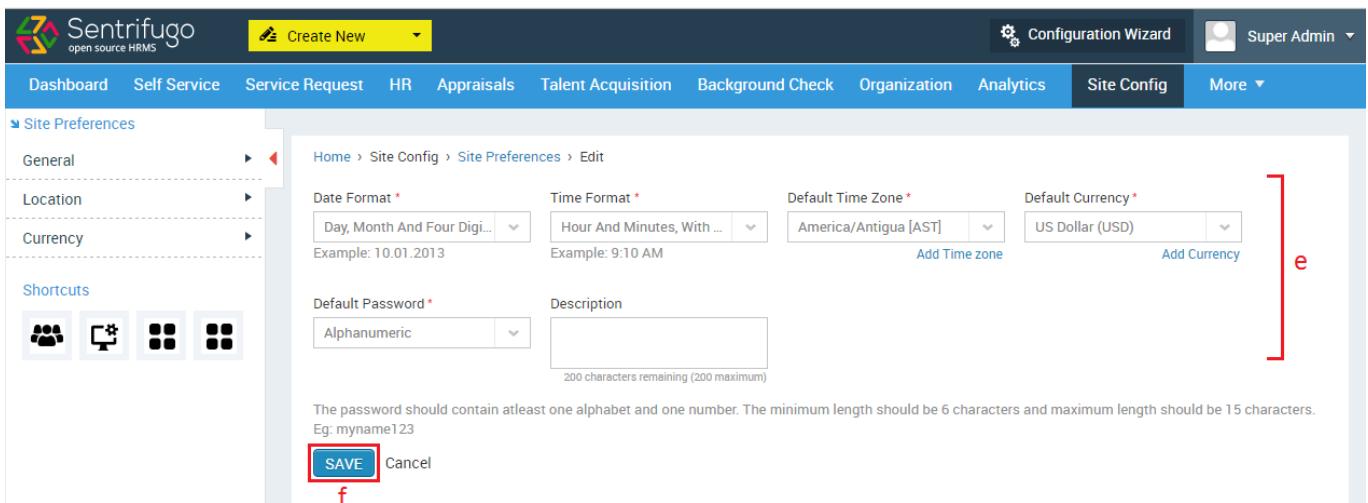


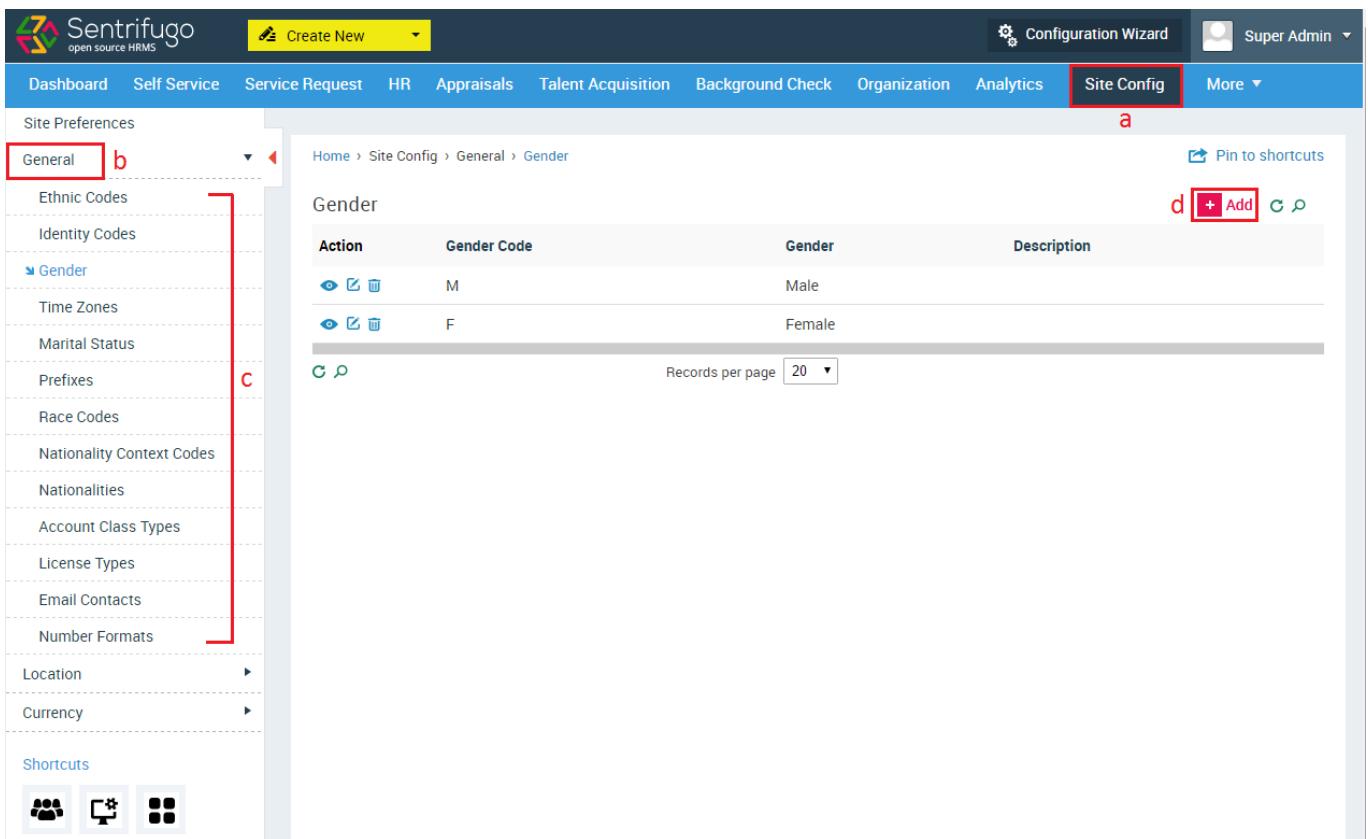
Figure 143

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

11.2 How do I set General Site Preferences?

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

Please refer Figure 144



Site Preferences

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

Shortcuts

a Configuration Wizard **d** Pin to shortcuts **e** More

f Super Admin

Home > Site Config > General > Gender

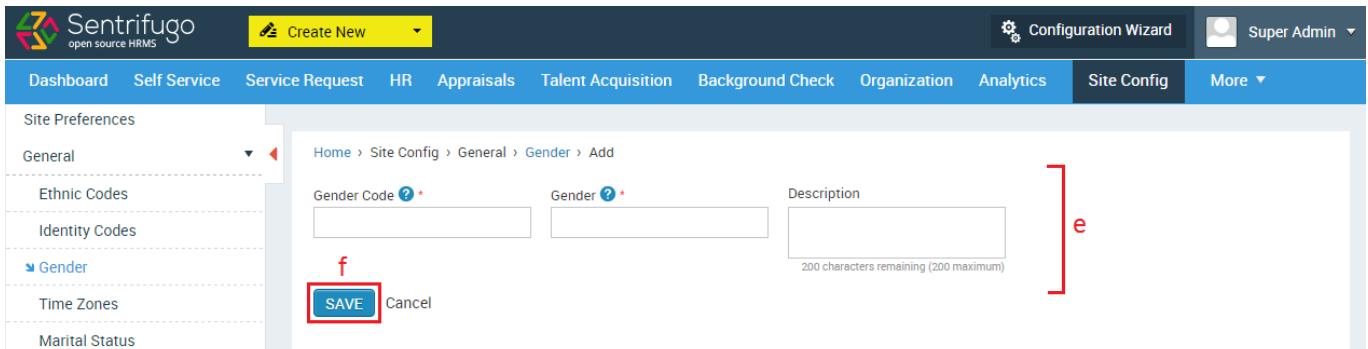
Action	Gender Code	Gender	Description
	M	Male	
	F	Female	

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



Site Preferences

- General **b**
- Ethnic Codes
- Identity Codes
- Gender **c**
- Time Zones
- Marital Status

Home > Site Config > General > Gender > Add

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

f SAVE Cancel

a Configuration Wizard **d** Pin to shortcuts **e** More

f Super Admin

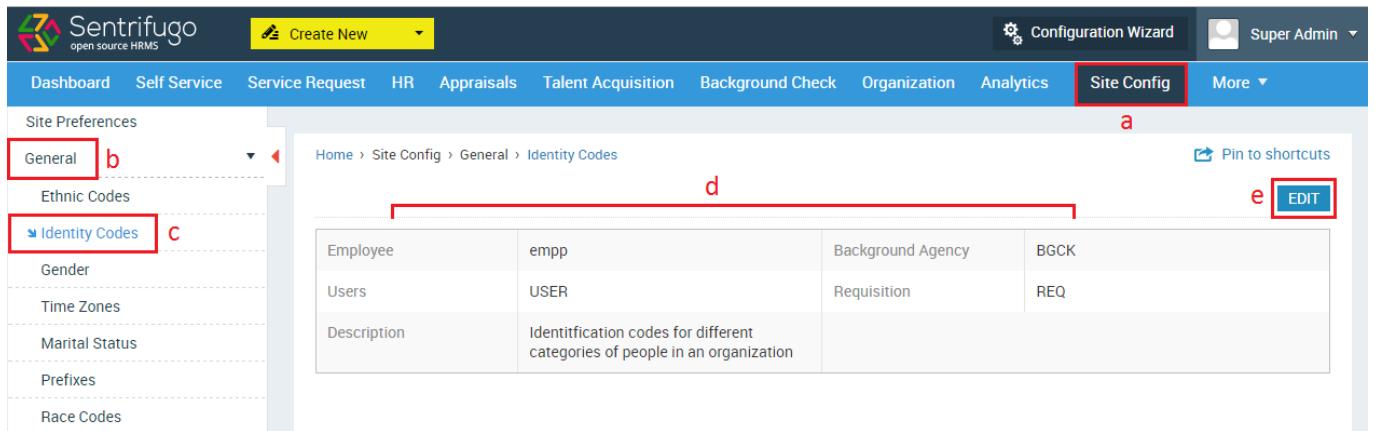
Figure 145

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

11.3 How do I set Identity Codes?

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

Please refer Figure 146



The screenshot shows the Sentrifugo interface with the following elements:

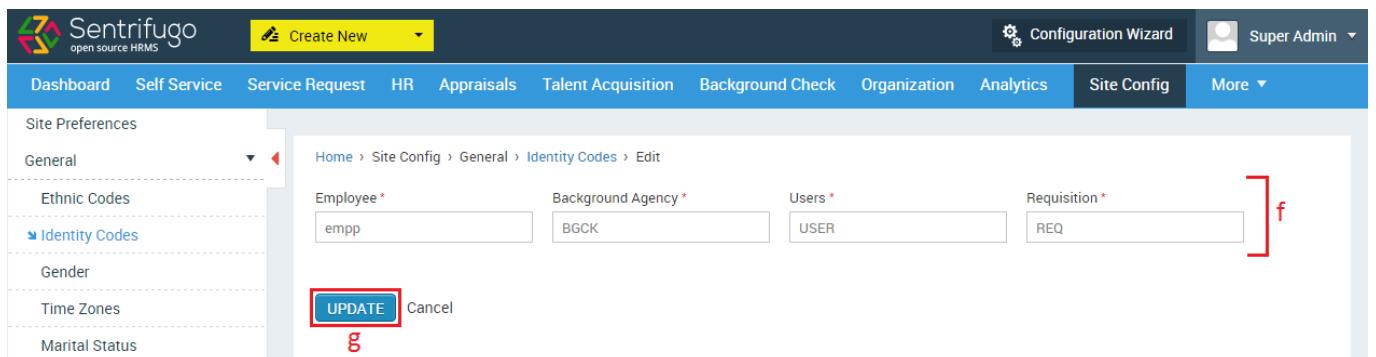
- Top Bar:** Create New, Configuration Wizard, Super Admin.
- Top Menu:** Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config (highlighted with a red box), More.
- Left Sidebar:** Site Preferences, General (highlighted with a red box), Ethnic Codes, Identity Codes (highlighted with a red box), Gender, Time Zones, Marital Status, Prefixes, Race Codes.
- Breadcrumb:** Home > Site Config > General > Identity Codes.
- Content Area:** A table with the following data:

Employee	empp	Background Agency	BGCK
Users	USER	Requisition	REQ
Description	Identification codes for different categories of people in an organization		
- Buttons:** Pin to shortcuts, EDIT (highlighted with a red box).

Figure 146

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

Please refer Figure 147



The screenshot shows the Sentrifugo interface with the following elements:

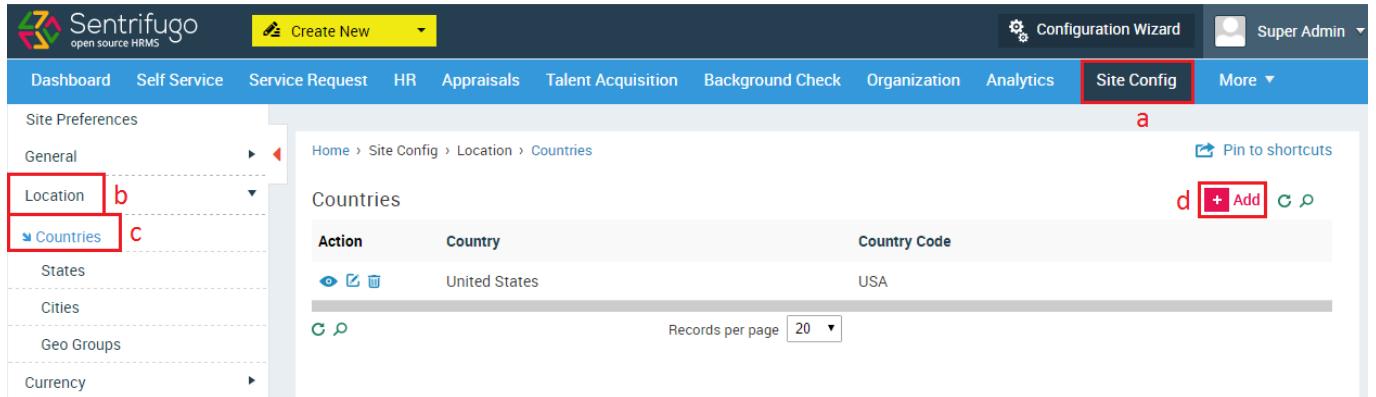
- Top Bar:** Create New, Configuration Wizard, Super Admin.
- Top Menu:** Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config (highlighted with a red box), More.
- Left Sidebar:** Site Preferences, General, Ethnic Codes, Identity Codes (highlighted with a red box), Gender, Time Zones, Marital Status.
- Breadcrumb:** Home > Site Config > General > Identity Codes > Edit.
- Form Fields:** Employee * (empp), Background Agency * (BGCK), Users * (USER), Requisition * (REQ).
- Buttons:** UPDATE (highlighted with a red box), Cancel, g.
- Red Box:** A large red bracket labeled 'f' covers the four input fields (Employee, Background Agency, Users, Requisition) and the 'UPDATE' button.

Figure 147

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

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

Please refer Figure 148



Action	Country	Country Code
	United States	USA

Figure 148

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

Please refer Figure 149

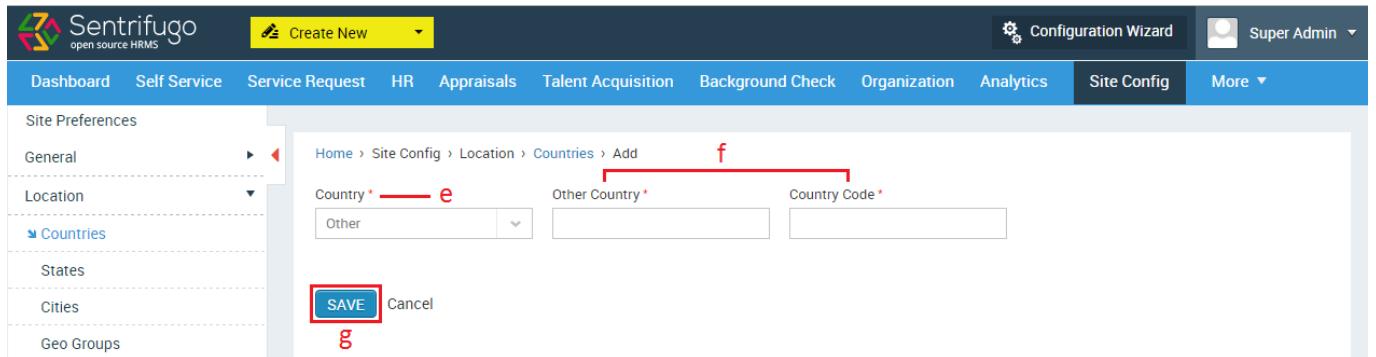


Figure 149

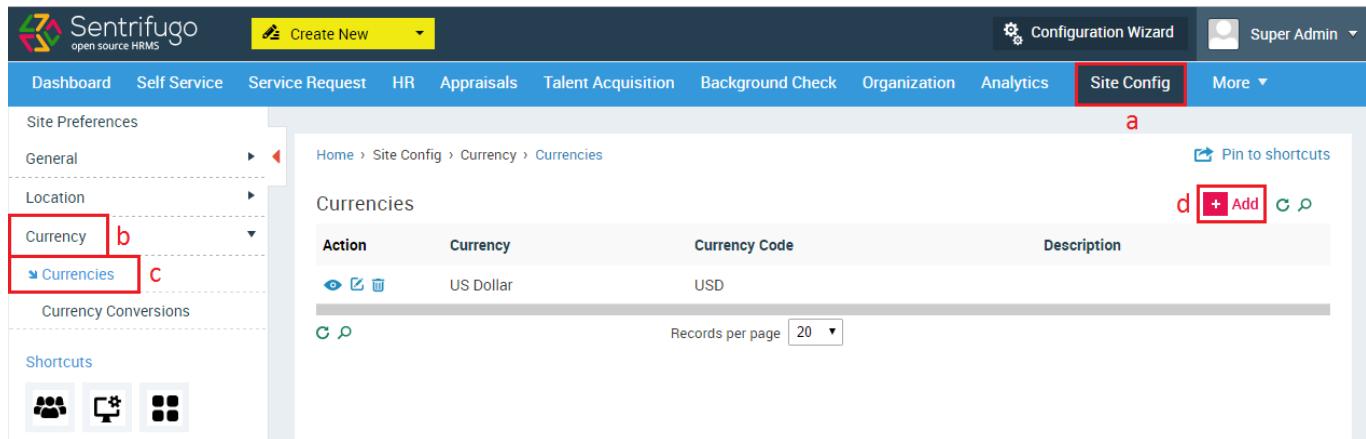
- Select 'Other' in the Country field
- Provide Other Country name and code
- Click **SAVE** button

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

11.5 How do I add Currency and Currency Conversions?

Currencies

Please refer Figure 150



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

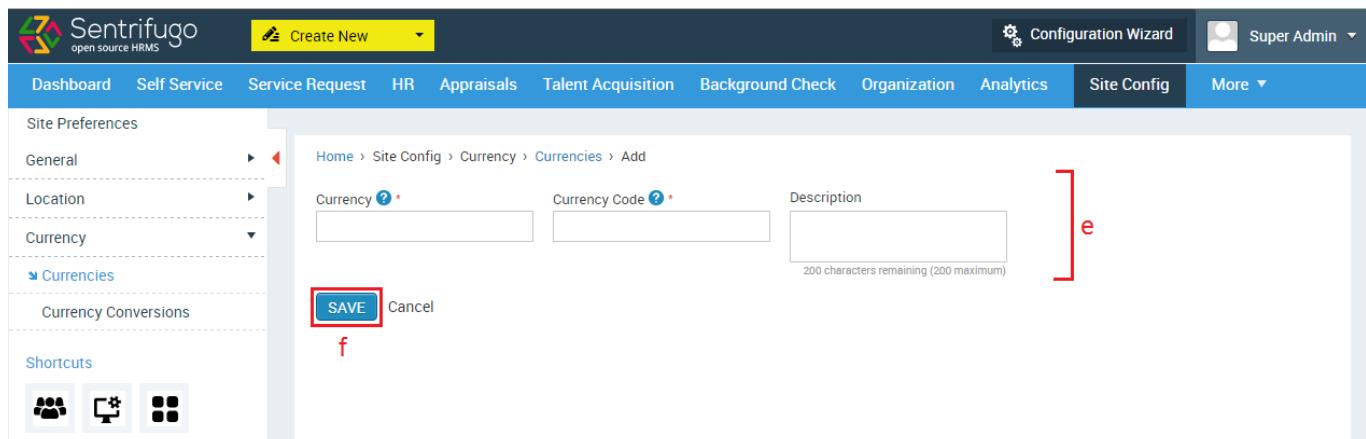
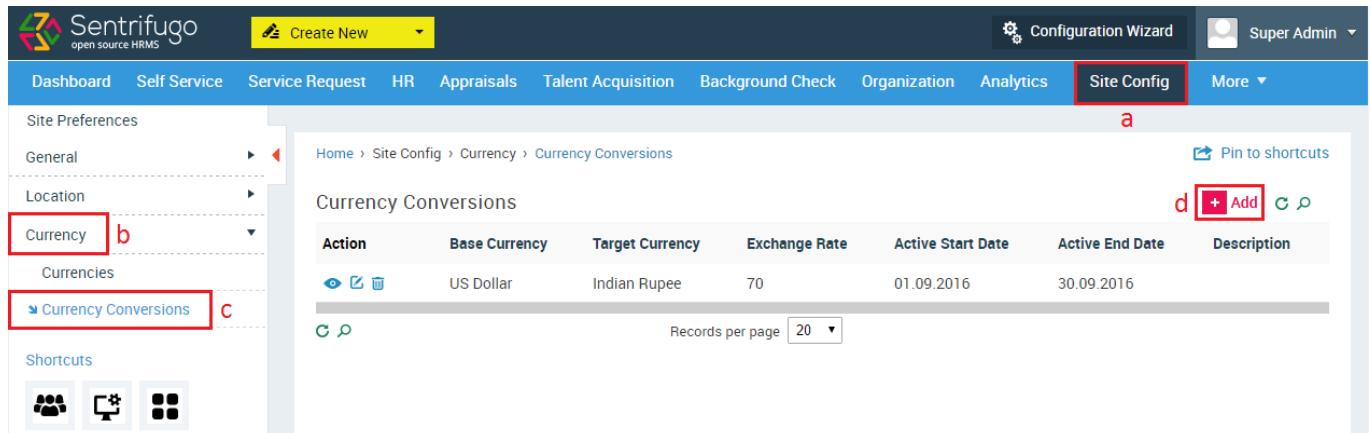


Figure 151

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

Currency Conversions

Please refer Figure 152



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

Figure 152

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

Please refer Figure 153

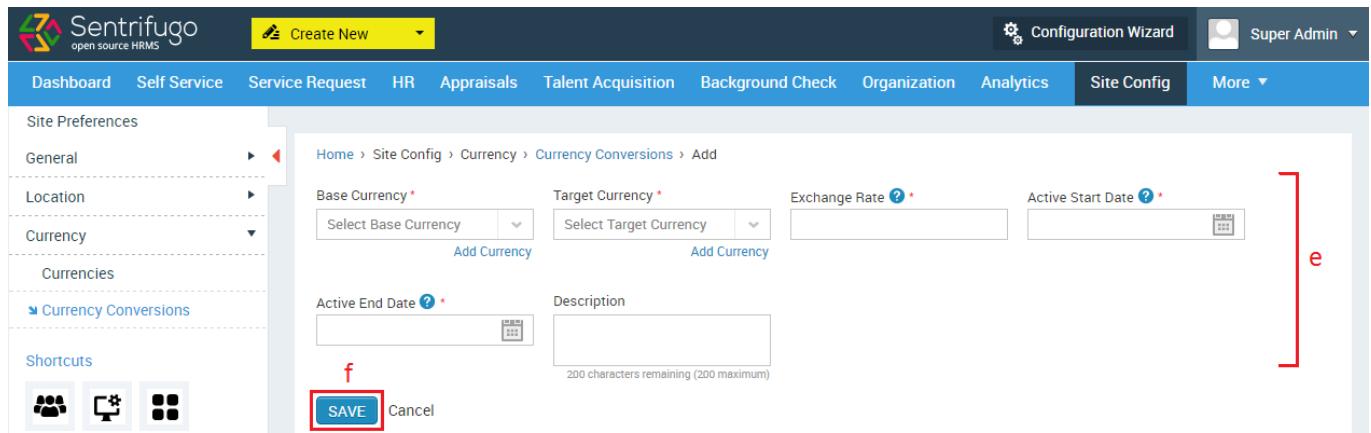


Figure 153

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

12. Modules

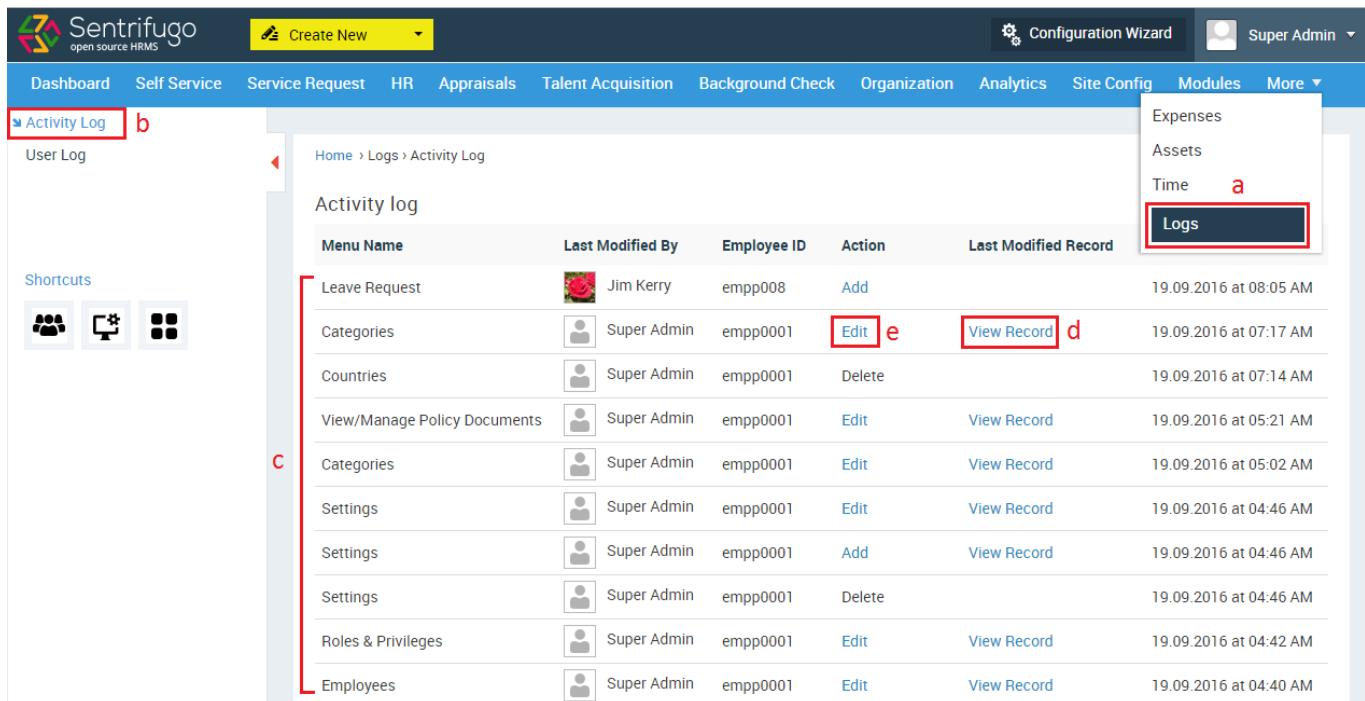
Please refer section [1.3.1 Configuration Wizard: Step 1](#)

13. Logs

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

13.1 How do I view Activity Logs?

Please refer Figure 154



Menu Name	Last Modified By	Employee ID	Action	Last Modified Record
Leave Request	Jim Kerry	empp008	Add	19.09.2016 at 08:05 AM
Categories	Super Admin	empp0001	Edit e	View Record d 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	View Record 19.09.2016 at 05:21 AM
Categories	Super Admin	empp0001	Edit	View Record 19.09.2016 at 05:02 AM
Settings	Super Admin	empp0001	Edit	View Record 19.09.2016 at 04:46 AM
Settings	Super Admin	empp0001	Add	View Record 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	View Record 19.09.2016 at 04:42 AM
Employees	Super Admin	empp0001	Edit	View Record 19.09.2016 at 04:40 AM

Figure 154

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

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

Categories - Edit

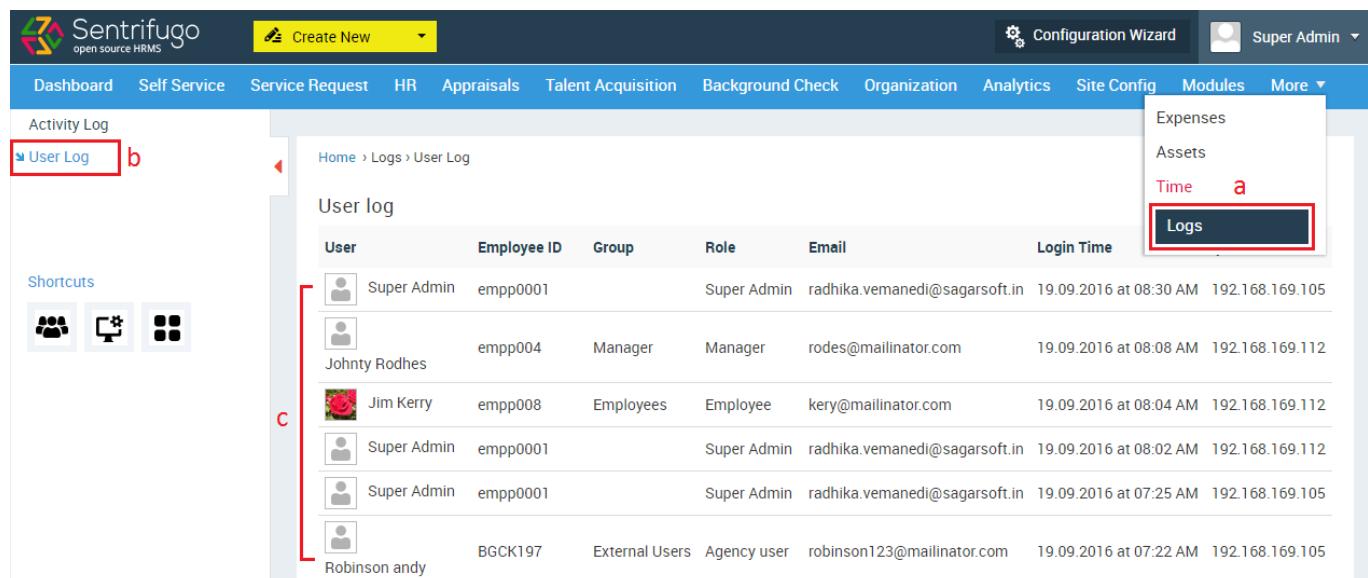
User	Employee ID	Date	Record
 Super Admin	empp0001	19.09.2016 at 07:17 AM	View Record
Records per page <input type="text" value="20"/> ▾			

CLOSE

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

13.2 How do I view User Logs?

Please refer Figure 155



The screenshot shows the Sentrifugo HRMS interface. At the top, there is a navigation bar with the brand logo, a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. Below the navigation bar, the main menu includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Talent Acquisition', 'Background Check', 'Organization', 'Analytics', 'Site Config', 'Modules', and a 'More' dropdown. The 'Logs' item in the 'More' dropdown is highlighted with a red box and labeled 'a'. On the left side, there is a sidebar titled 'Activity Log' with a 'User Log' link, which is also highlighted with a red box and labeled 'b'. The main content area displays a table titled 'User log' with columns: User, Employee ID, Group, Role, Email, and Login Time. The table lists several user entries, each with a small profile picture and detailed login information. A red bracket labeled 'c' points from the left sidebar to the 'User log' table.

Figure 155

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

14. Expenses

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

14.1 How do I add an Expense Category?

Please refer Figure 156

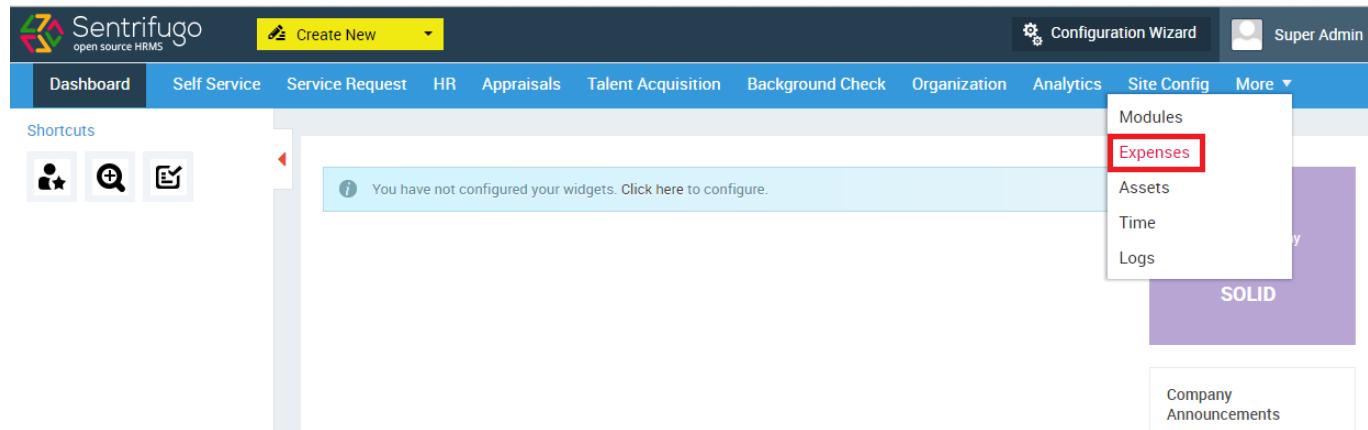
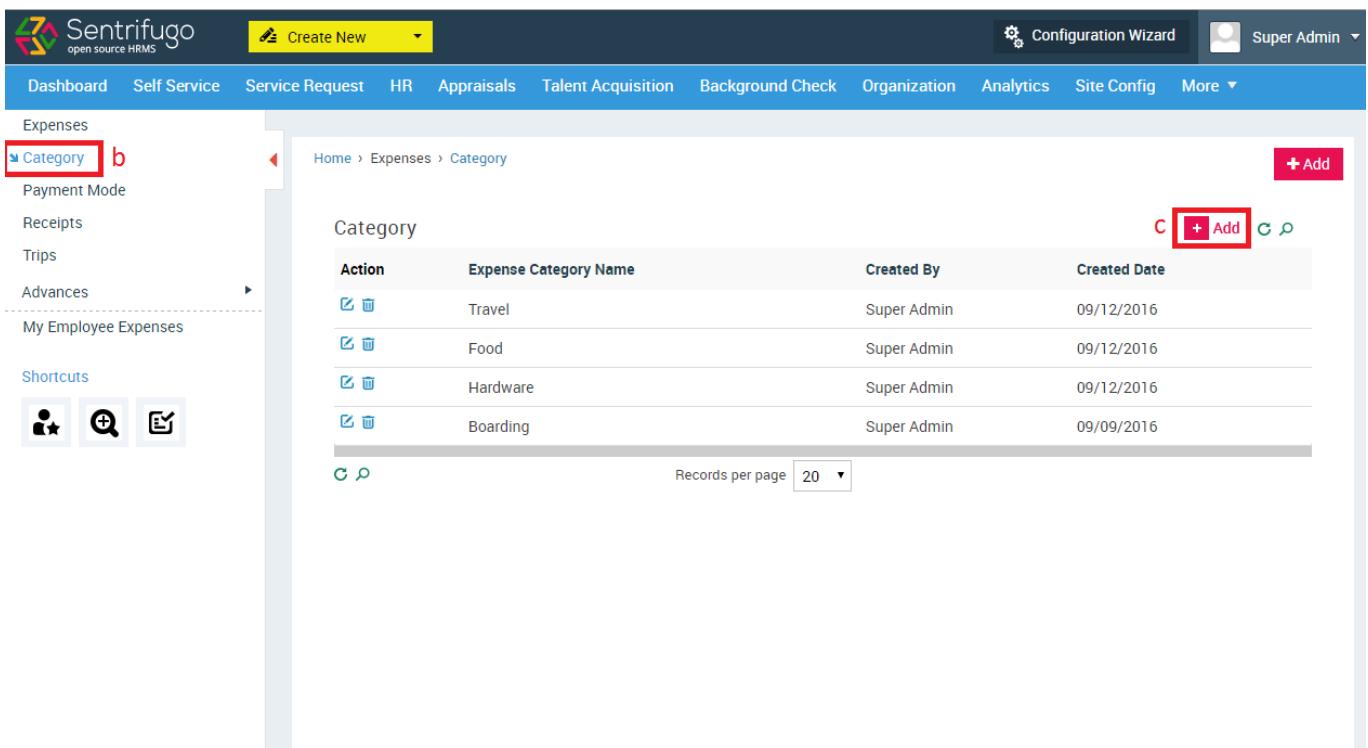


Figure 156

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

Please refer Figure 157



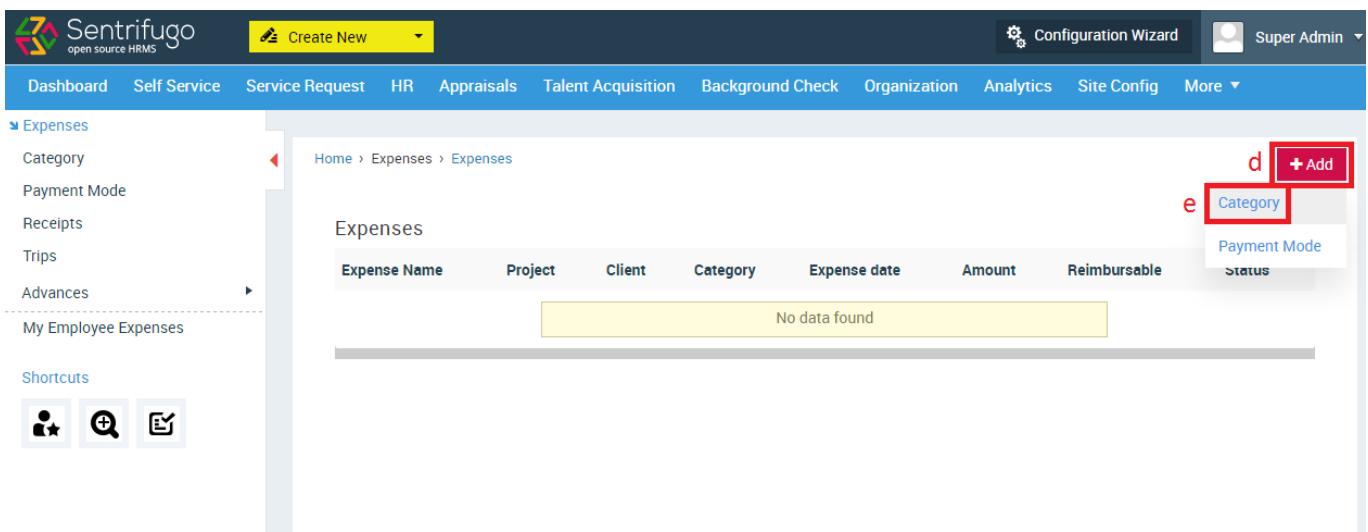
The screenshot shows the Sentrifugo web application interface. The top navigation bar includes links for Configuration Wizard, Super Admin, Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left sidebar, under the Expenses section, the 'Category' link is highlighted with a red box and labeled 'b'. The main content area displays a list of expense categories with columns for Action, Expense Category Name, Created By, and Created Date. The first four entries are Travel, Food, Hardware, and Boarding, all created by Super Admin on 09/12/2016. A red box labeled 'c' highlights the '+Add' button in the top right corner of the list table.

Figure 157

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

Or

Please refer Figure 158



The screenshot shows the Sentrifugo web application interface. The top navigation bar includes links for Configuration Wizard, Super Admin, Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left sidebar, under the Expenses section, the 'Category' link is highlighted with a red box and labeled 'e'. The main content area displays a list of expenses with columns for Expense Name, Project, Client, Category, Expense date, Amount, Reimbursable, and Status. A red box labeled 'd' highlights the '+Add' button in the top right corner of the list table. A message 'No data found' is displayed in a yellow box at the bottom of the list table.

Figure 158

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

Please refer Figure 159

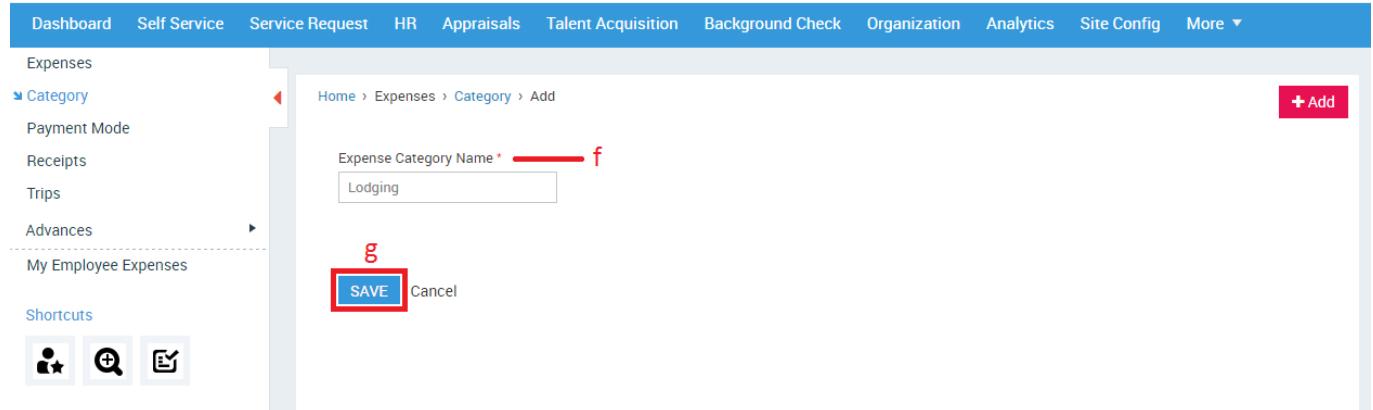


Figure 159

- 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

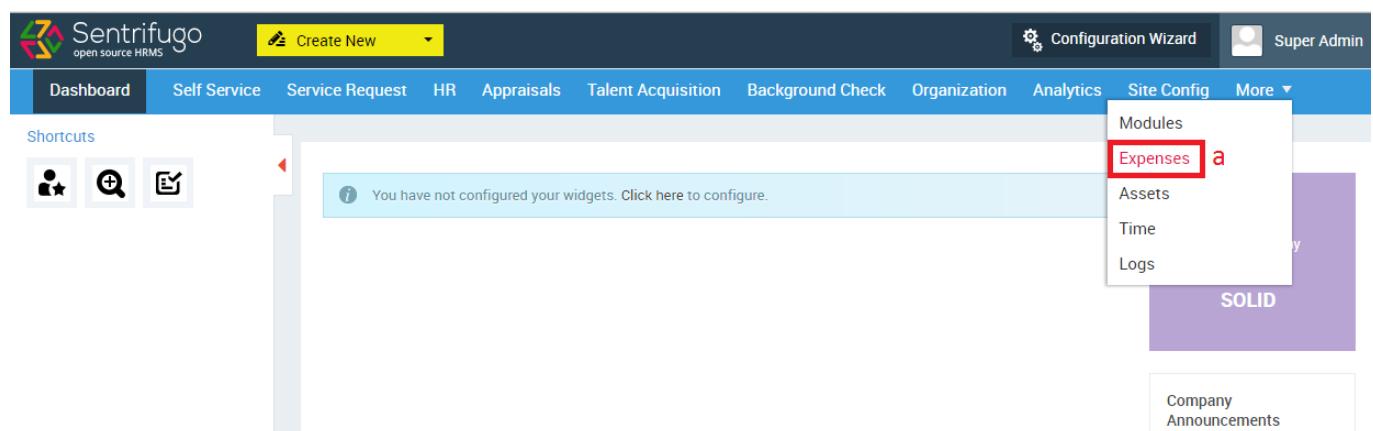
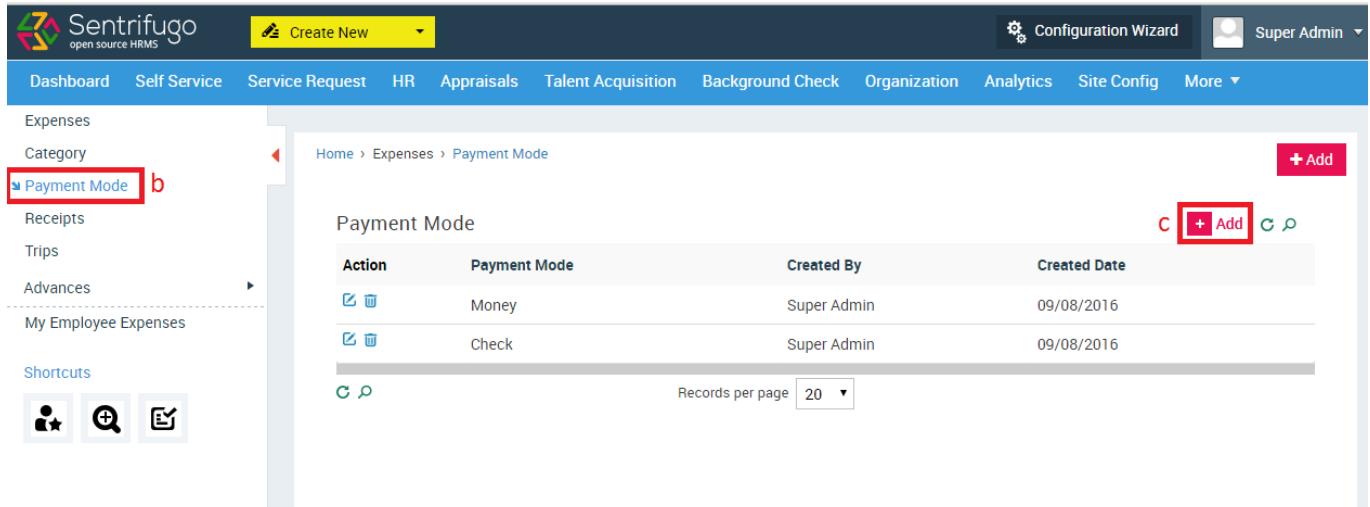


Figure 160

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

Please refer Figure 161



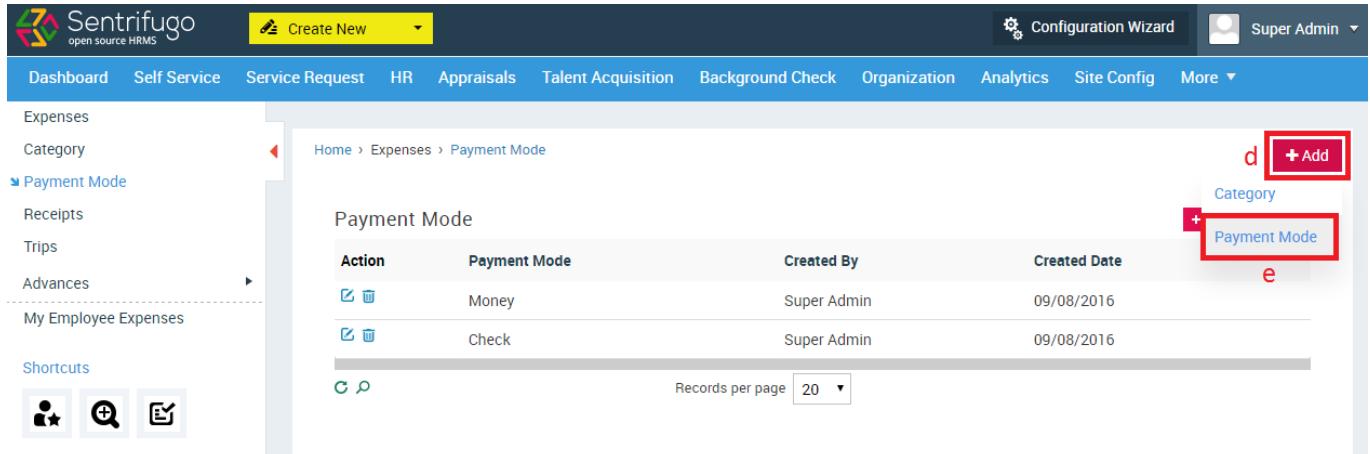
Action	Payment Mode	Created By	Created Date
	Money	Super Admin	09/08/2016
	Check	Super Admin	09/08/2016

Figure 161

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

Or

Please refer Figure 162

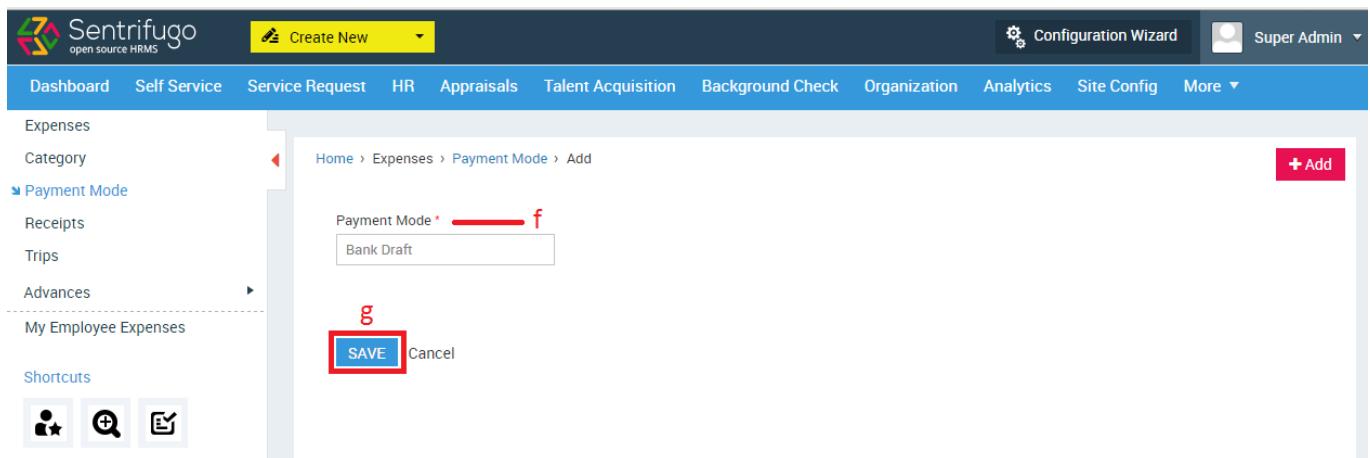


Action	Payment Mode	Created By	Created Date
	Money	Super Admin	09/08/2016
	Check	Super Admin	09/08/2016

Figure 162

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

Please refer Figure 163



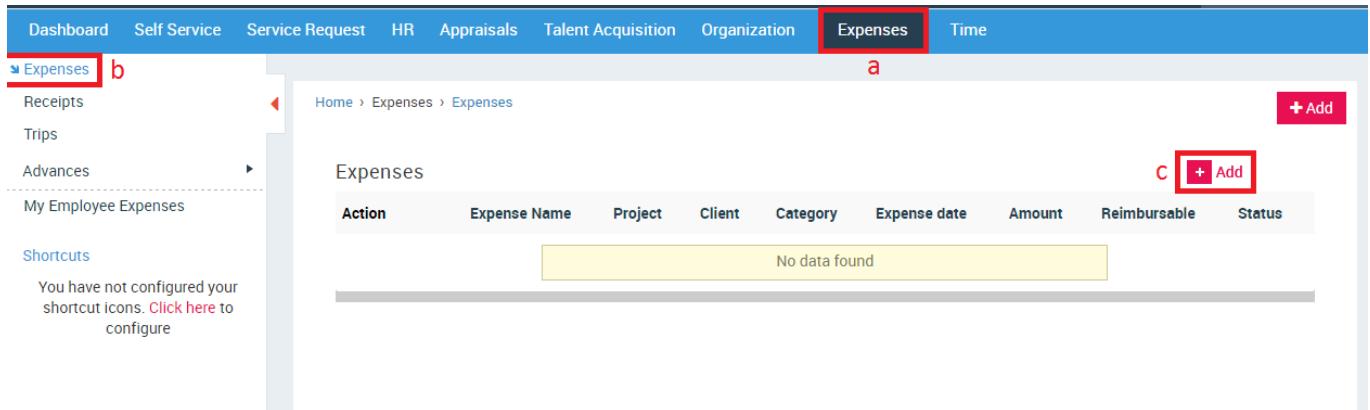
The screenshot shows the Sentrifugo HRMS interface. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the far right, there are Configuration Wizard and Super Admin options. Below the navigation bar is a secondary menu with categories such as Expenses, Category, Payment Mode (which is currently selected), Receipts, Trips, Advances, My Employee Expenses, and Shortcuts. The main content area shows a breadcrumb path: Home > Expenses > Payment Mode > Add. A form is displayed with a 'Payment Mode *' field containing 'Bank Draft'. A red box highlights the 'SAVE' button at the bottom of the form.

Figure 163

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

14.3 How do I add an Expense?

Please refer Figure 164

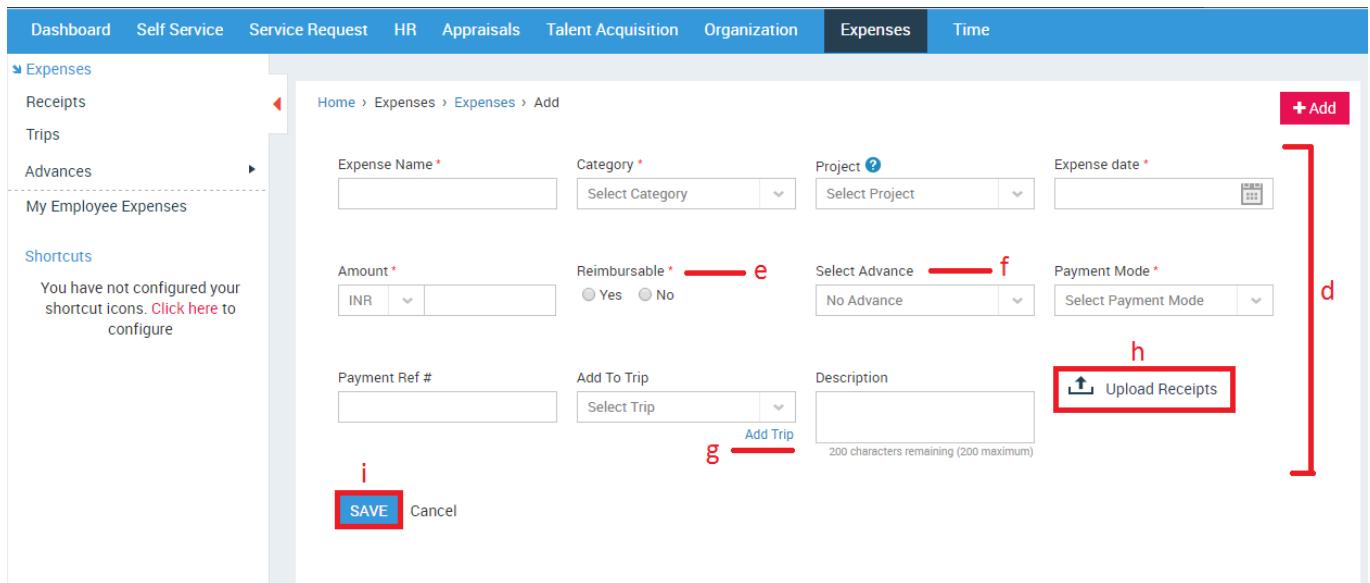


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses (which is highlighted with a red box), and Time. The left sidebar has a 'Expenses' section (highlighted with a red box) containing Receipts, Trips, Advances, and My Employee Expenses. It also includes a 'Shortcuts' section with a note about未配置 shortcut图标. The main content area shows a breadcrumb path: Home > Expenses > Expenses. A table titled 'Expenses' is displayed with columns: Action, Expense Name, Project, Client, Category, Expense date, Amount, Reimbursable, and Status. A red box highlights the '+Add' button at the top right of the table area. A message 'No data found' is shown below the table.

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' section of the Sentrifugo interface. On the left, there's a sidebar with links like 'Receipts', 'Trips', 'Advances', and 'My Employee Expenses'. The main area has fields for 'Expense Name', 'Category', 'Project', 'Expense date', 'Amount', 'Reimbursable' (with 'Yes' and 'No' radio buttons), 'Select Advance', 'Payment Mode', 'Payment Ref #', 'Add To Trip', and 'Description'. A red bracket labeled 'd' points to the 'Upload Receipts' button. A red arrow labeled 'h' points to the 'Add Trip' link. A red box labeled 'g' highlights the 'Add Trip' link. A red box labeled 'i' highlights the 'SAVE' button. A red bracket labeled 'j' points to the 'Cancel' link.

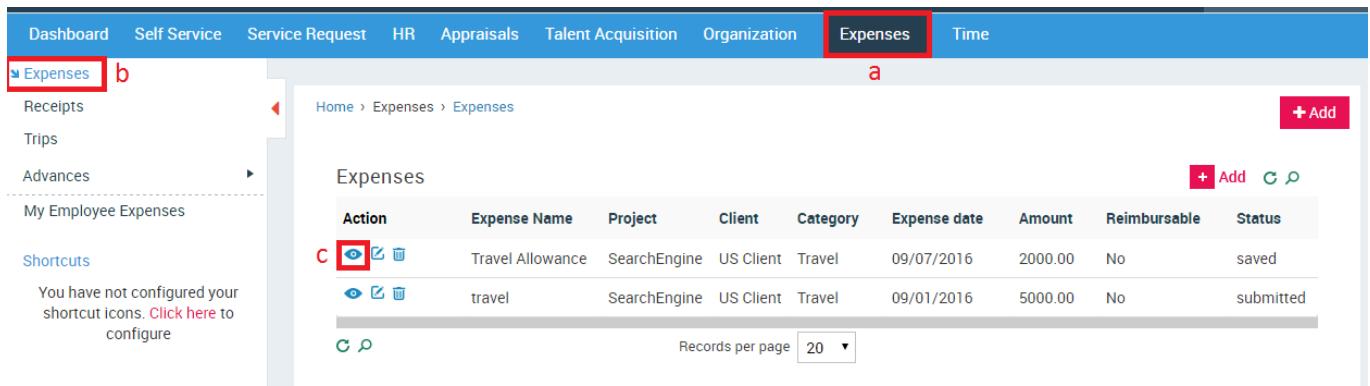
Figure 165

- 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



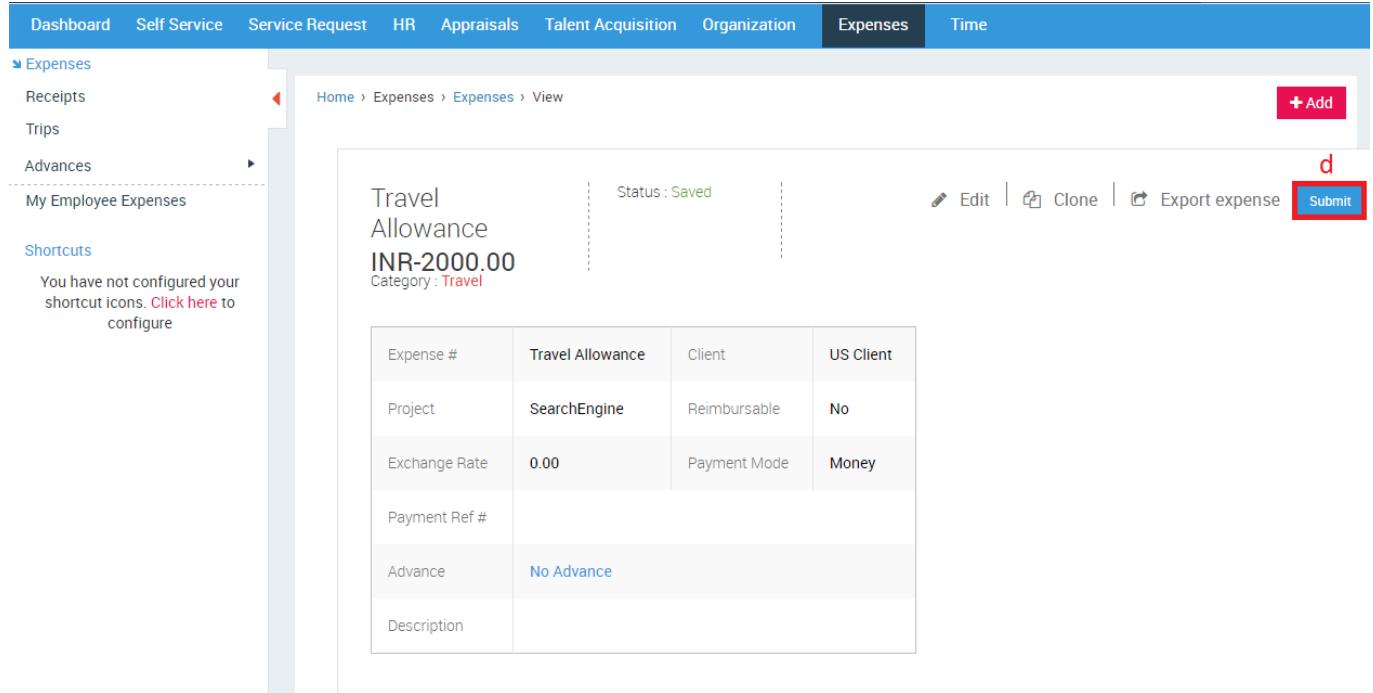
The screenshot shows the 'Expenses' list page. The top navigation bar has a red box around 'Expenses'. The sidebar has links for 'Receipts', 'Trips', 'Advances', and 'My Employee Expenses'. The main area shows a table of expenses with columns: Action, Expense Name, Project, Client, Category, Expense date, Amount, Reimbursable, and Status. There are red boxes around the 'Action' column header and the 'Status' column header. Red numbers 'b', 'a', 'c', and 'd' are placed near the sidebar and the table headers.

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 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 web interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses (which is highlighted in dark blue), and Time. On the left, a sidebar has sections for Expenses (Receipts, Trips, Advances, My Employee Expenses), and Shortcuts (with a note about configuring icons). The main content area shows a travel allowance expense form. The title is "Travel Allowance" with a value of "INR-2000.00". The status is "Saved". Below the title, it says "Category : Travel". To the right are buttons for Edit, Clone, Export expense, and a red-bordered "Submit" button labeled "d". A table below lists expense details: Expense # (SearchEngine), Travel Allowance (INR-2000.00), Client (US Client), US Client (No); Project (SearchEngine), Reimbursable (Yes); Exchange Rate (0.00), Payment Mode (Money); Payment Ref # (empty); Advance (No Advance); and Description (empty).

Figure 167

- d. Click **Submit** button

A confirmation message will be displayed.

Please refer Figure 168

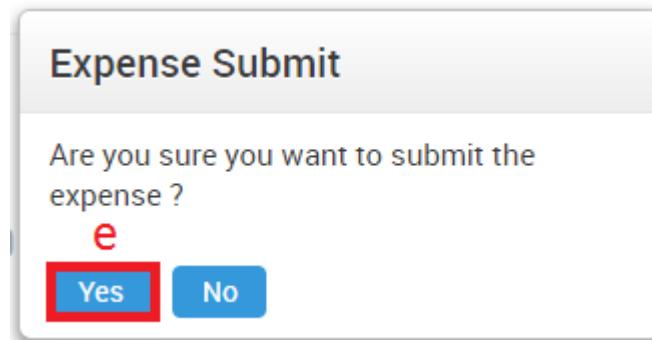


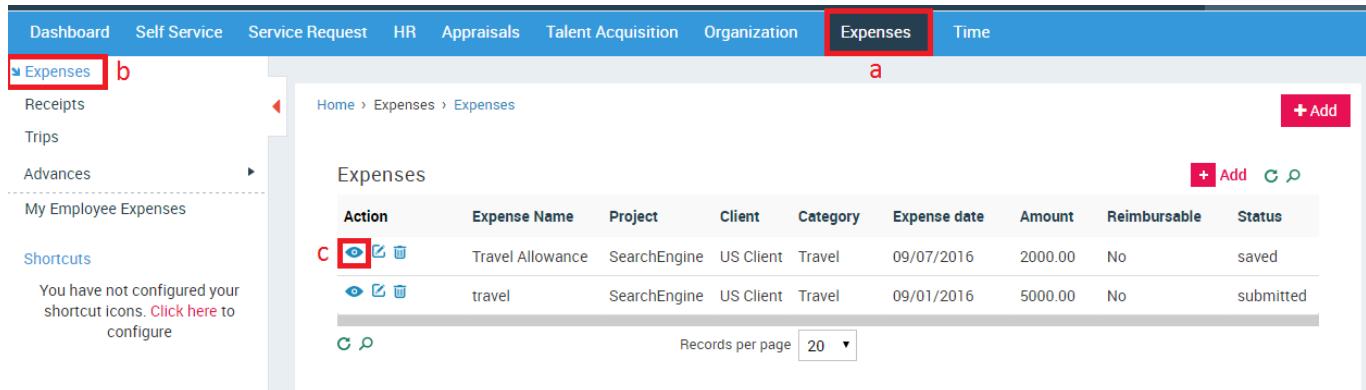
Figure 168

- 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

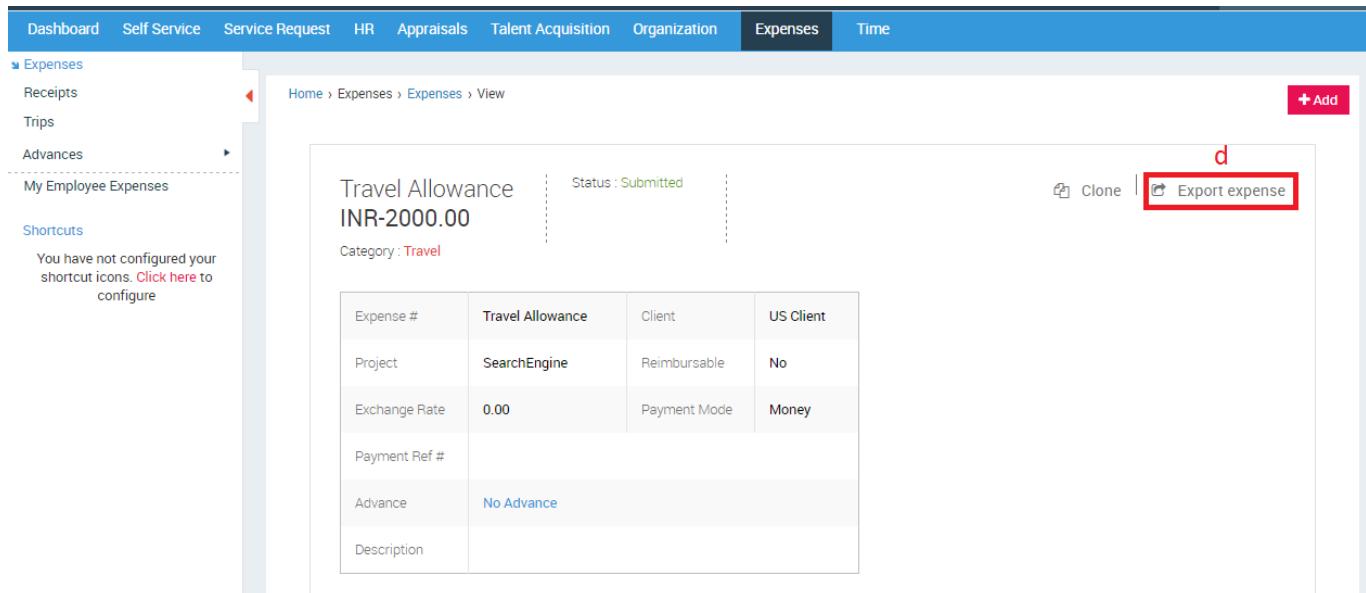


Action	Expense Name	Project	Client	Category	Expense date	Amount	Reimbursable	Status
C	Travel Allowance	SearchEngine	US Client	Travel	09/07/2016	2000.00	No	saved
C	travel	SearchEngine	US Client	Travel	09/01/2016	5000.00	No	submitted

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

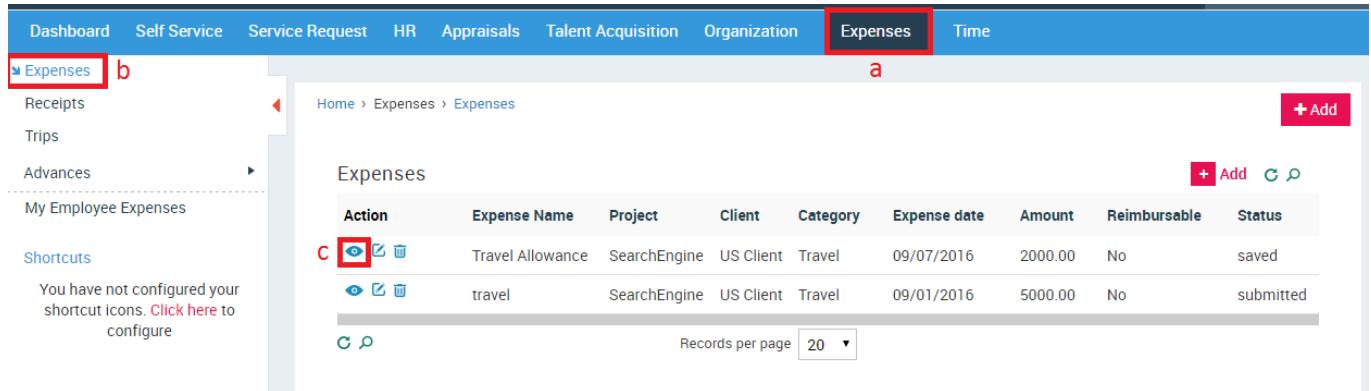
An expense report in PDF format will be downloaded.

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

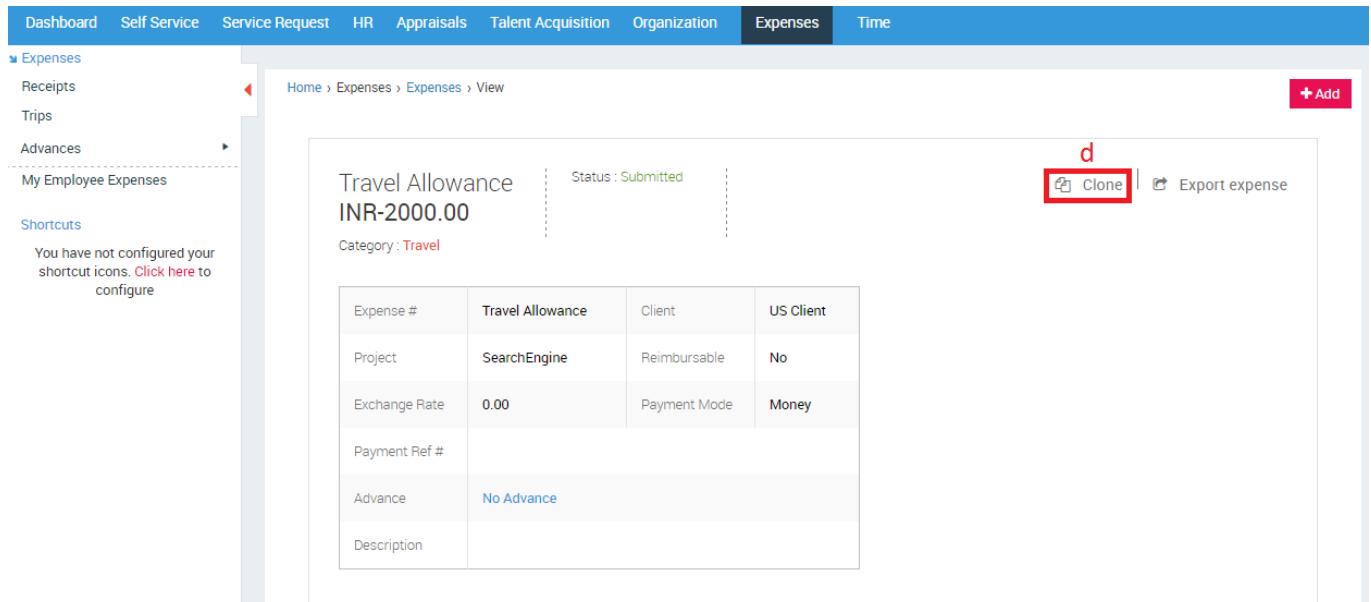


Action	Expense Name	Project	Client	Category	Expense date	Amount	Reimbursable	Status
	Travel Allowance	SearchEngine	US Client	Travel	09/07/2016	2000.00	No	saved
	travel	SearchEngine	US Client	Travel	09/01/2016	5000.00	No	submitted

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



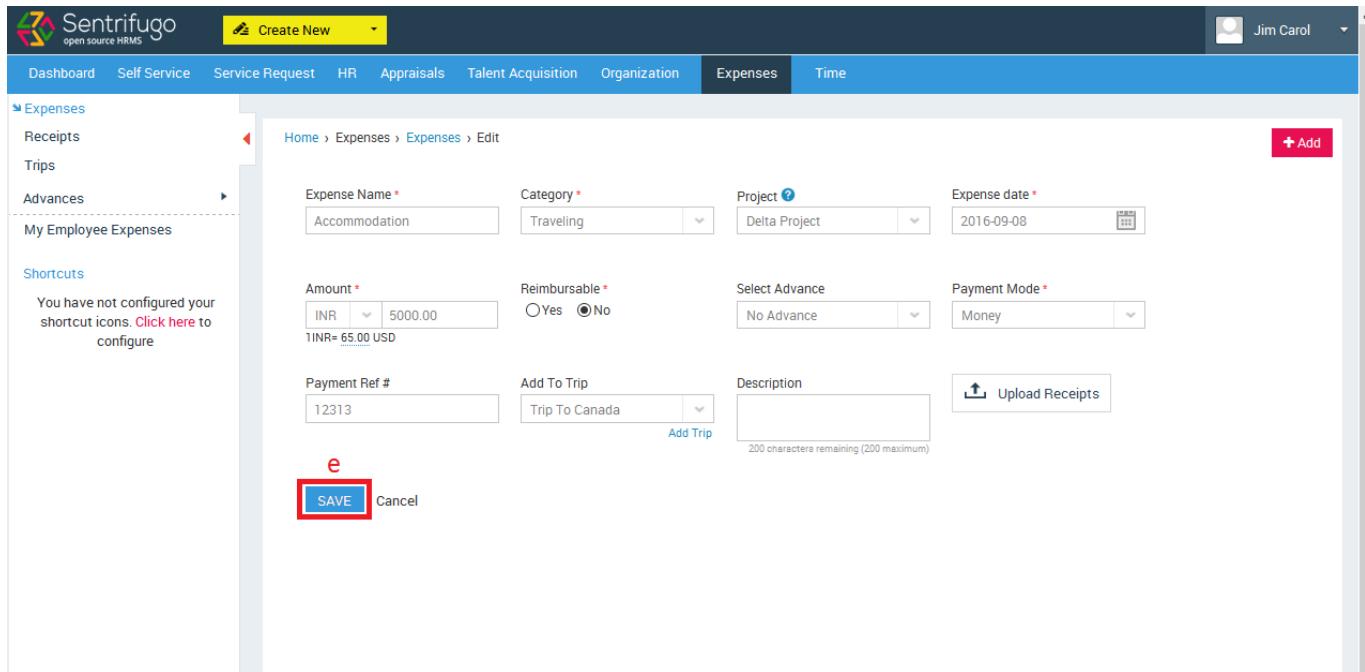
Expense #	Travel Allowance	Client	US Client
Project	SearchEngine	Reimbursable	No
Exchange Rate	0.00	Payment Mode	Money
Payment Ref #			
Advance	No Advance		
Description			

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



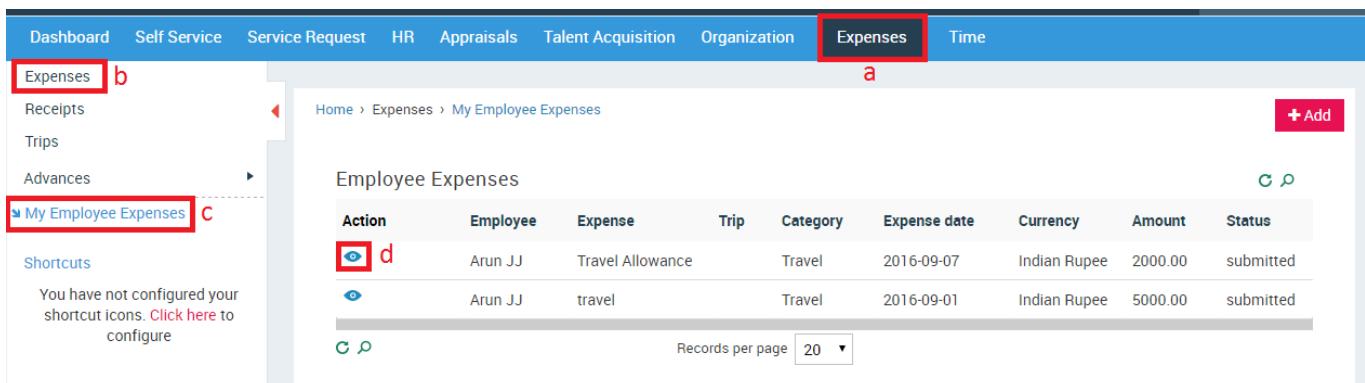
The screenshot shows the 'Add Expense' form. The 'Expense Name' field contains 'Accommodation'. The 'Category' dropdown is set to 'Traveling'. The 'Project' dropdown is set to 'Delta Project'. The 'Expense date' is '2016-09-08'. The 'Amount' field shows '5000.00' (INR). The 'Reimbursable' field has 'No' selected. The 'Select Advance' dropdown is set to 'No Advance'. The 'Payment Mode' dropdown is set to 'Money'. The 'Payment Ref #' field contains '12313'. The 'Add To Trip' dropdown is set to 'Trip To Canada'. The 'Description' field is empty. A red box labeled 'e' highlights the 'SAVE' button. A red box labeled 'd' highlights the 'Cancel' button.

Figure 173

e. Click **SAVE** button

14.7 How do I approve/reject Employee Expenses?

Please refer Figure 174



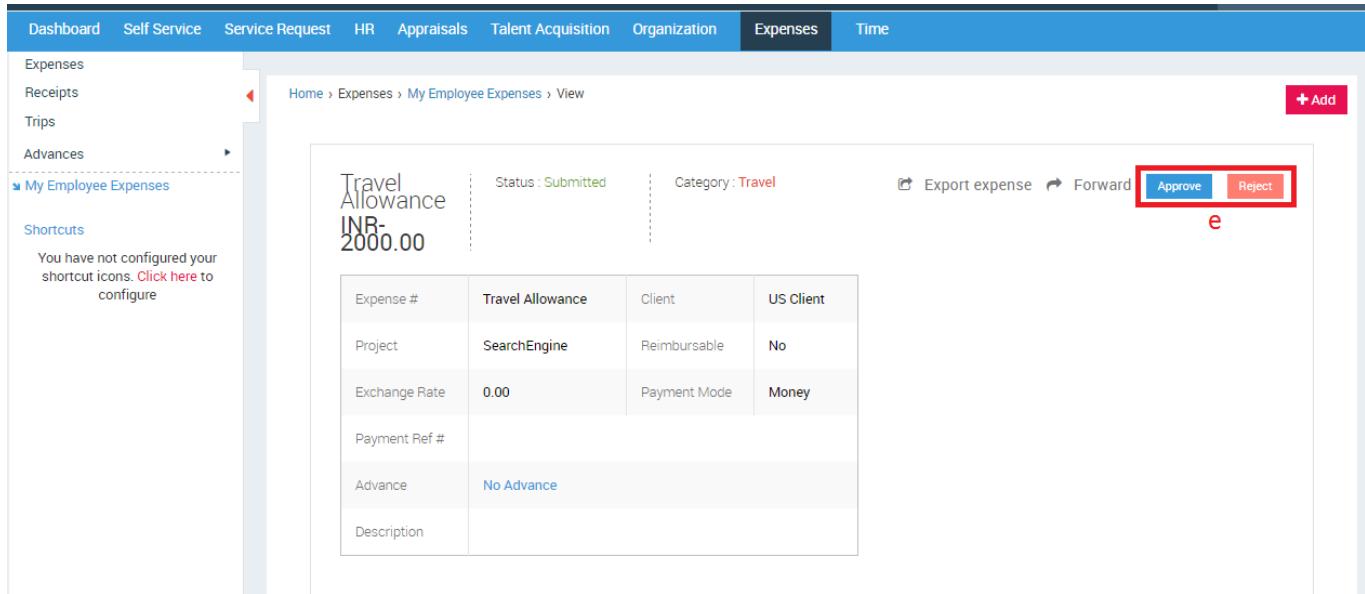
The screenshot shows the 'Employee Expenses' list. The 'Action' column includes icons for viewing and editing. The 'Employee' column lists 'Arun JJ'. The 'Expense' column lists 'Travel Allowance' and 'travel'. The 'Trip' column lists 'Travel'. The 'Category' column lists 'Travel'. The 'Expense date' column lists '2016-09-07' and '2016-09-01'. The 'Currency' column lists 'Indian Rupee'. The 'Amount' column lists '2000.00' and '5000.00'. The 'Status' column lists 'submitted'. A red box labeled 'b' highlights the 'Expenses' menu item. A red box labeled 'c' highlights the 'My Employee Expenses' link. A red box labeled 'd' highlights the 'Edit' icon in the first row. A red box labeled 'a' highlights the 'Expenses' tab in the top menu. A red box labeled 'e' highlights the 'New' button.

Figure 174

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

- b. Click **Expenses** in the left menu panel
- c. Click **My Employee Expenses** in the submenu
- d. Click **View** icon in the action column

Please refer Figure 175



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

Figure 175

- e. Click **Approve/Reject**

A confirmation message will be displayed.

Please refer Figure 176

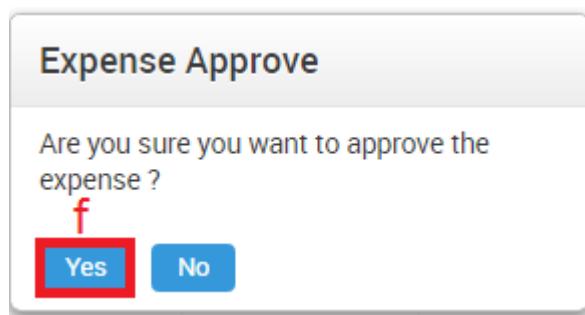
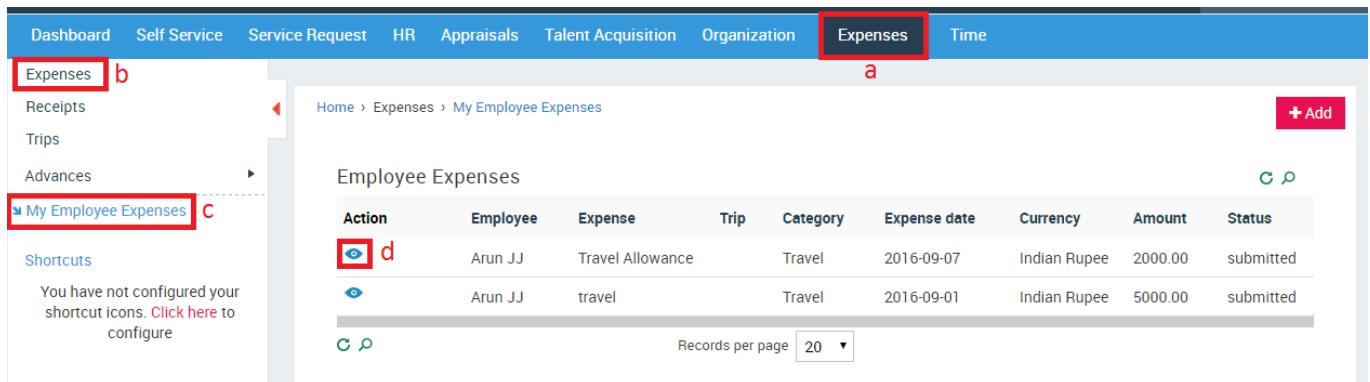


Figure 176

- f. Click **Yes** Button

14.8 How do I forward an Expense to another Manager?

Please refer Figure 177



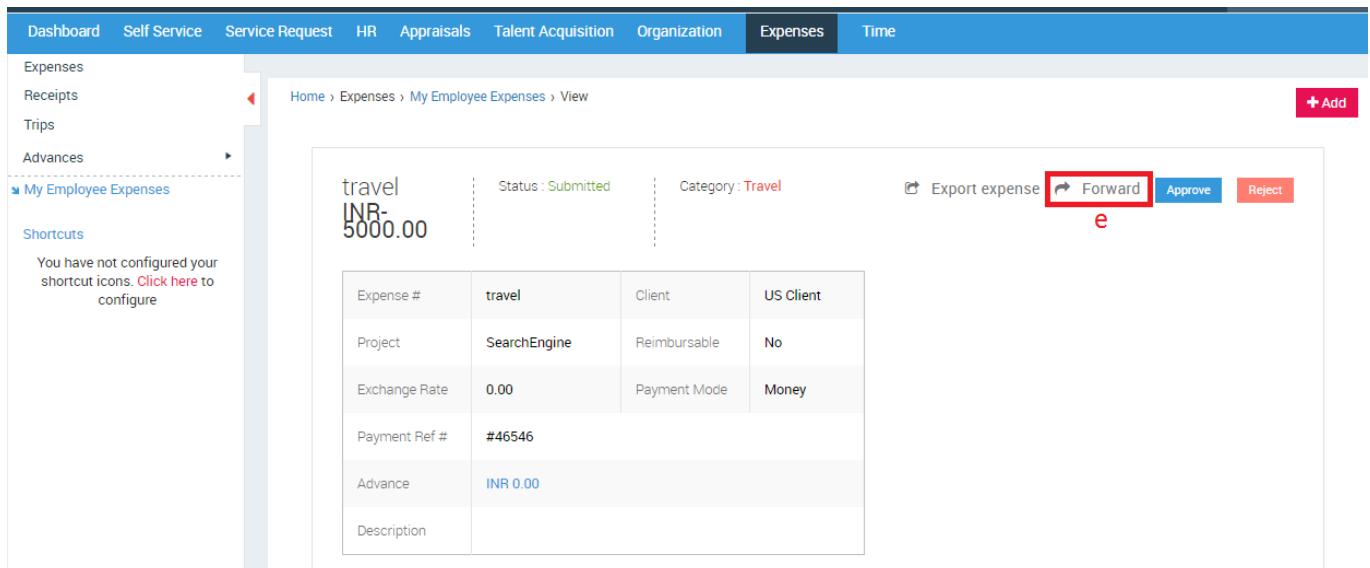
The screenshot shows the 'Employee Expenses' list. The table has columns: Action, Employee, Expense, Trip, Category, Expense date, Currency, Amount, and Status. Two rows are listed:

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 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



The screenshot shows the details of an expense named 'travel' with amount 'INR-5000.00'. The status is 'Submitted' and the category is 'Travel'. The table below lists expense details:

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

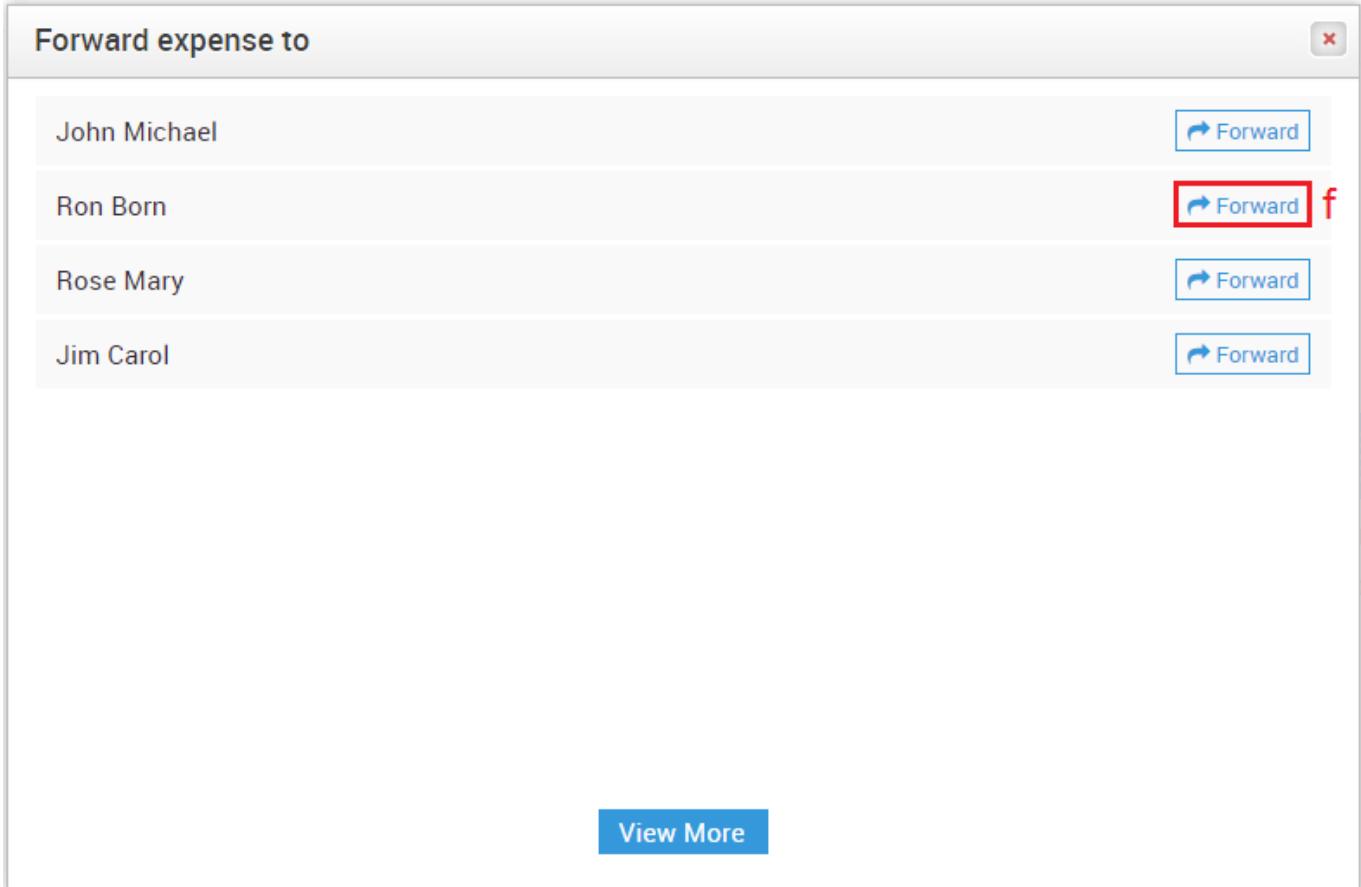


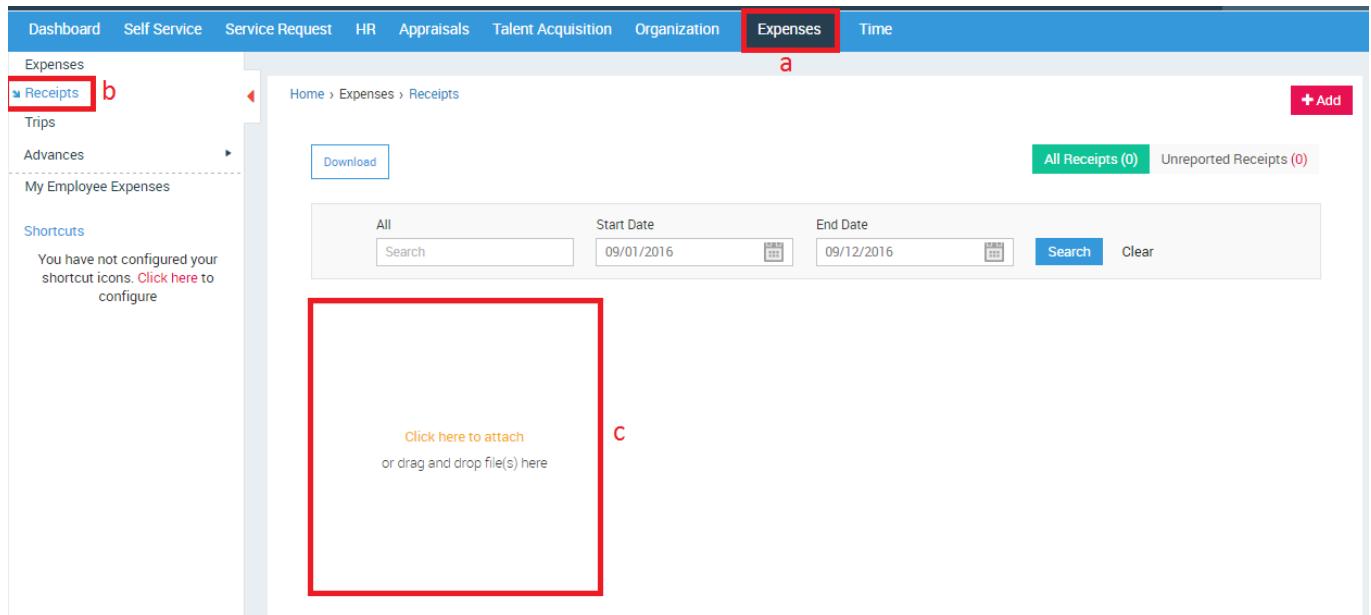
Figure 178

- 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



The screenshot shows the Sentrifugo web application interface for managing expenses. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses (which is highlighted with a red box), and Time. On the left sidebar, under the Expenses section, there are links for Receipts (also highlighted with a red box), Trips, Advances, and My Employee Expenses. A message in the Shortcuts section indicates that shortcut icons have not been configured and provides a link to do so. The main content area displays a breadcrumb path (Home > Expenses > Receipts) and a '+ Add' button. Below this are download and search buttons, and a search bar with fields for All, Start Date (09/01/2016), End Date (09/12/2016), Search, and Clear. A large central area is outlined with a red box and contains the text 'Click here to attach or drag and drop file(s) here'. Red labels 'a', 'b', and 'c' are overlaid on the interface to identify specific elements: 'a' points to the 'Expenses' menu item, 'b' points to the 'Receipts' menu item, and 'c' points to the file upload area.

Figure 179

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

14.10 How do I download my Receipts?

Please refer Figure 180

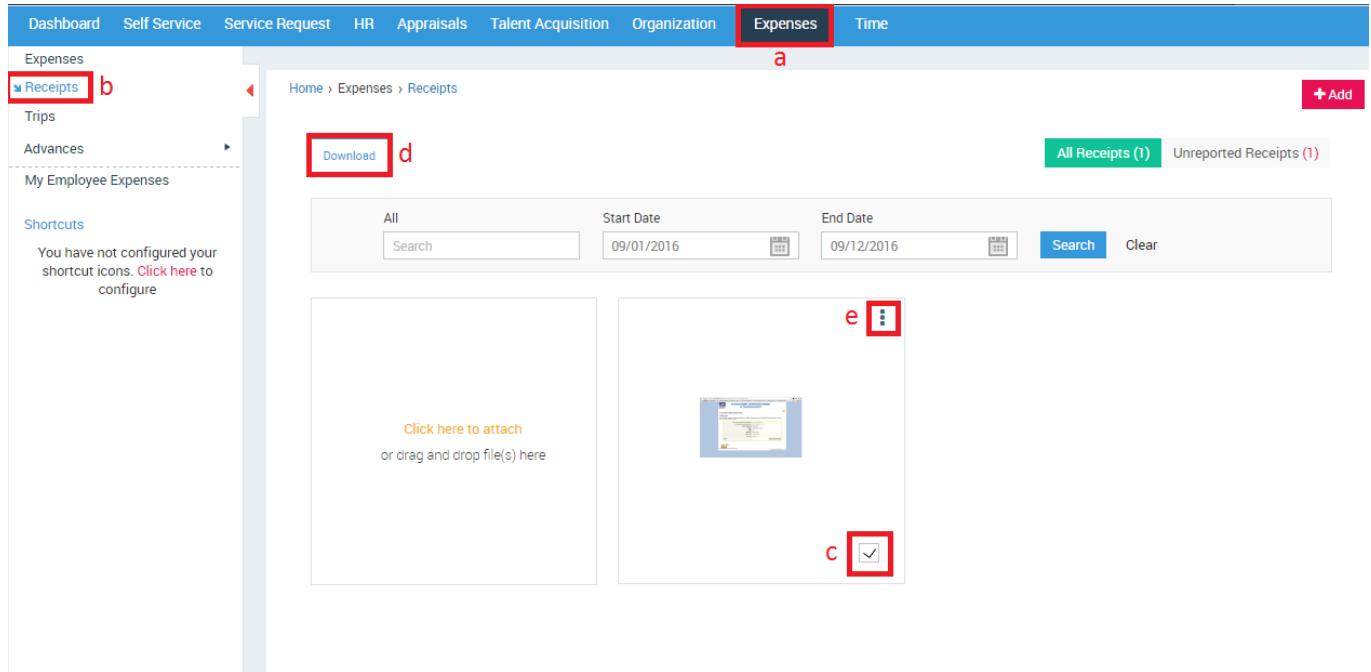


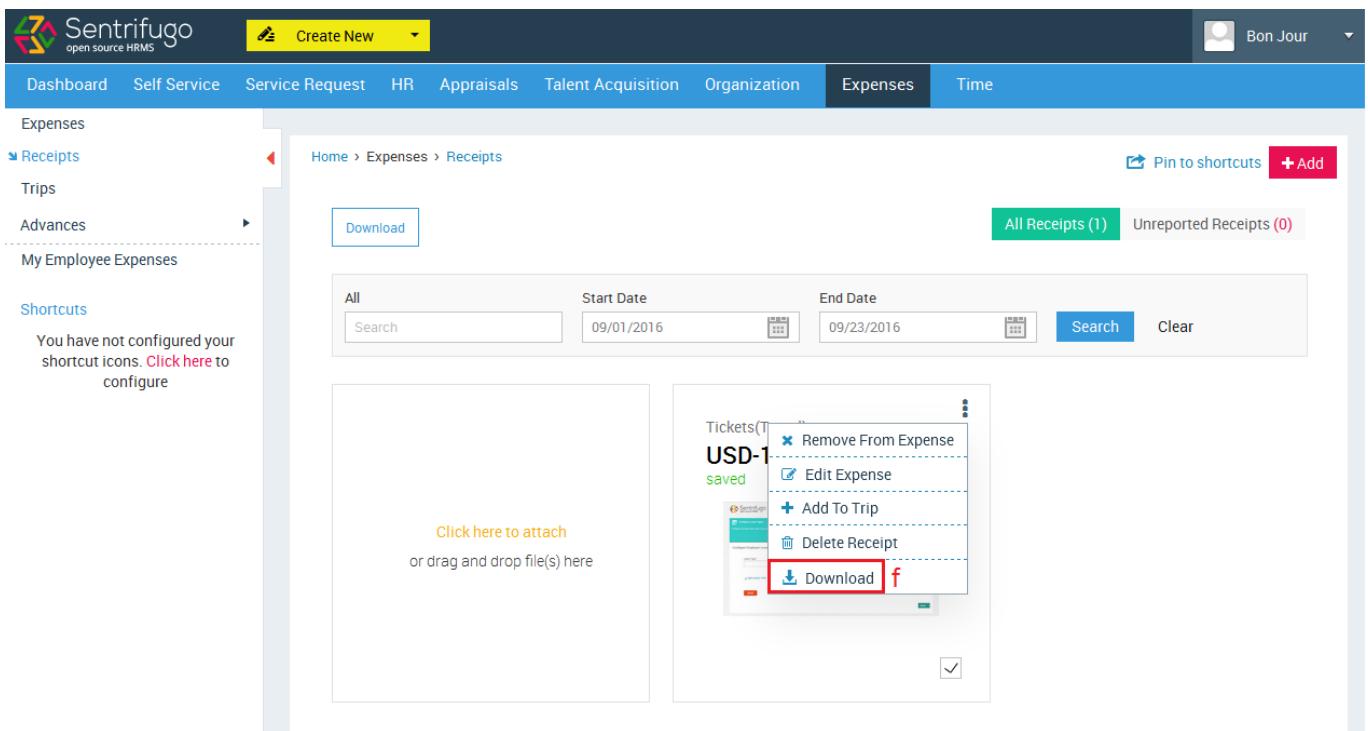
Figure 180

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

Or

- e. Click **More Action** icon

Please refer Figure 181



The screenshot shows the Sentrifugo 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. On the left, a sidebar lists 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 search bar with fields for All, Start Date (09/01/2016), End Date (09/23/2016), and buttons for Search and Clear. Below the search is a file attachment area with instructions: "Click here to attach or drag and drop file(s) here". To the right, a receipt for "USD-1" is displayed with a context menu open over it. The menu options include Remove From Expense, Edit Expense, Add To Trip, Delete Receipt, and Download, with the "Download" option highlighted by a red box. At the bottom right of the receipt area is a checked checkbox.

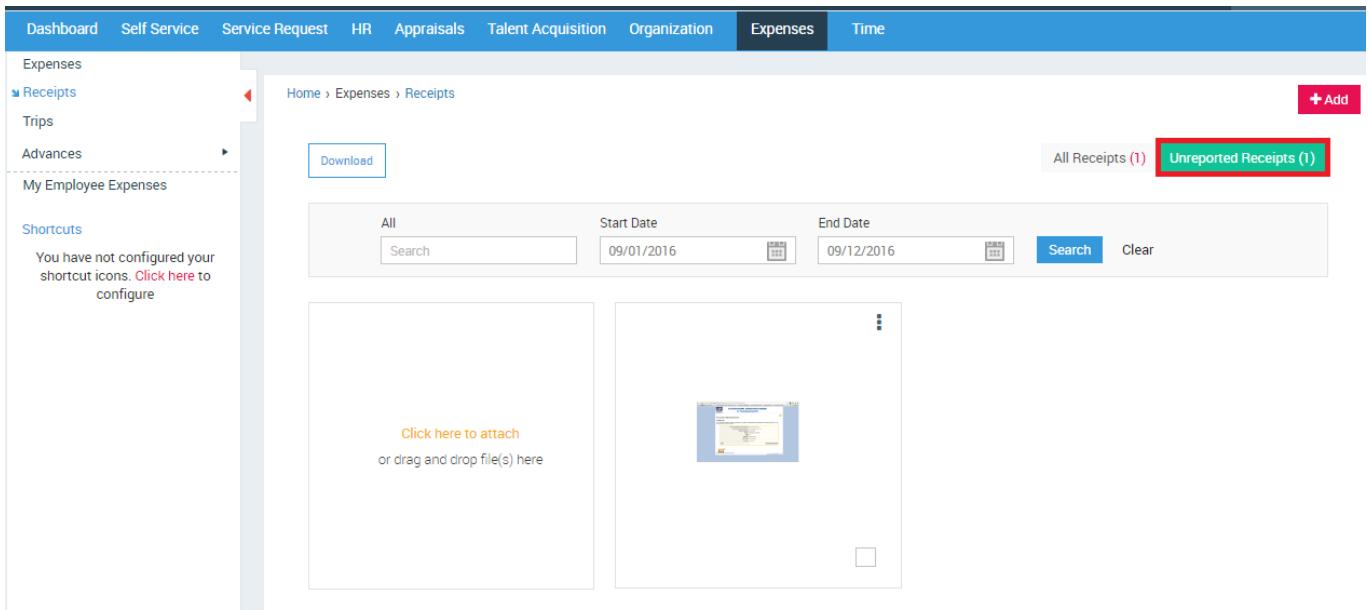
Figure 181

f. Select Download

14.11 What are Unreported Receipts?

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

Please refer Figure 182



This screenshot shows the same Sentrifugo interface as Figure 181, but with a different focus. The "Unreported Receipts" tab is selected in the top navigation bar. The main content area shows a breadcrumb path: Home > Expenses > Receipts. The search bar and file attachment area are identical to Figure 181. However, the receipt list on the right shows only one item, labeled "Unreported Receipts (1)". This receipt is shown with a thumbnail image and a checkbox at the bottom right.

Figure 182

14.12 How do I add Receipts to Expenses/Trips?

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

Please refer Figure 183

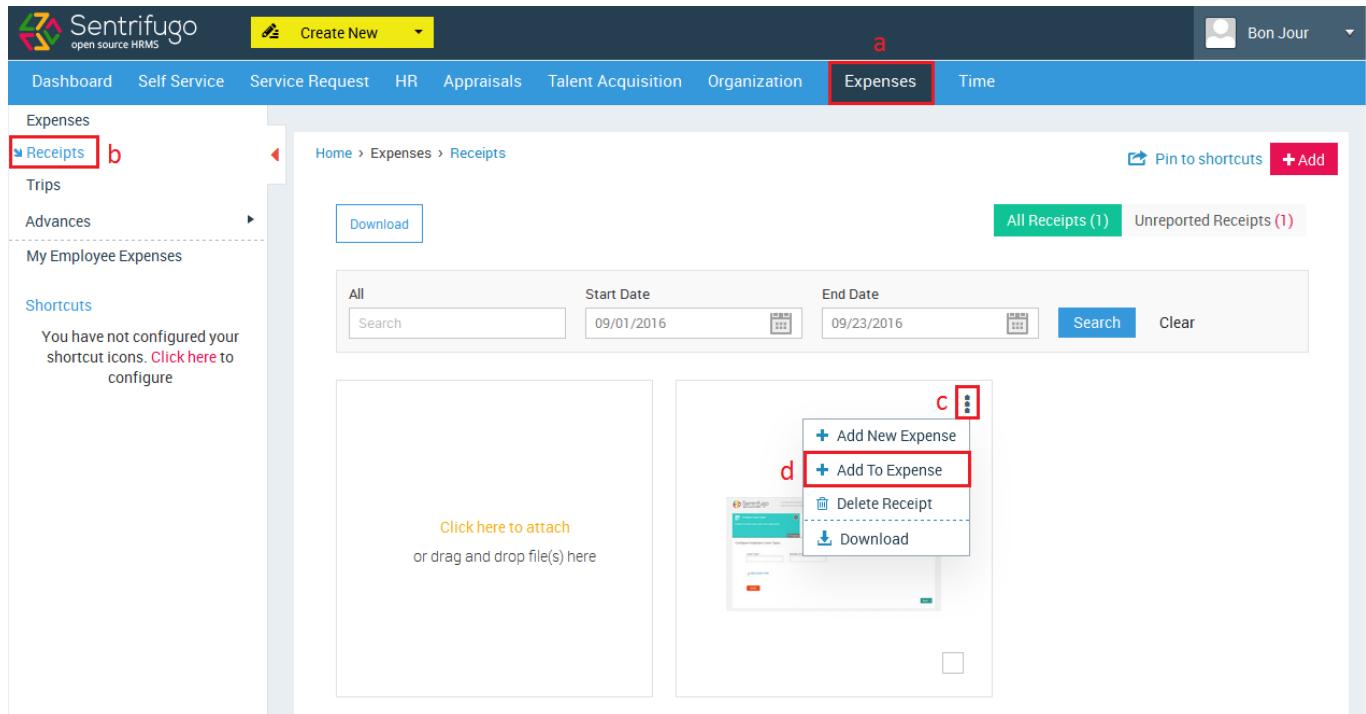


Figure 183

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

A small pop up window will open.

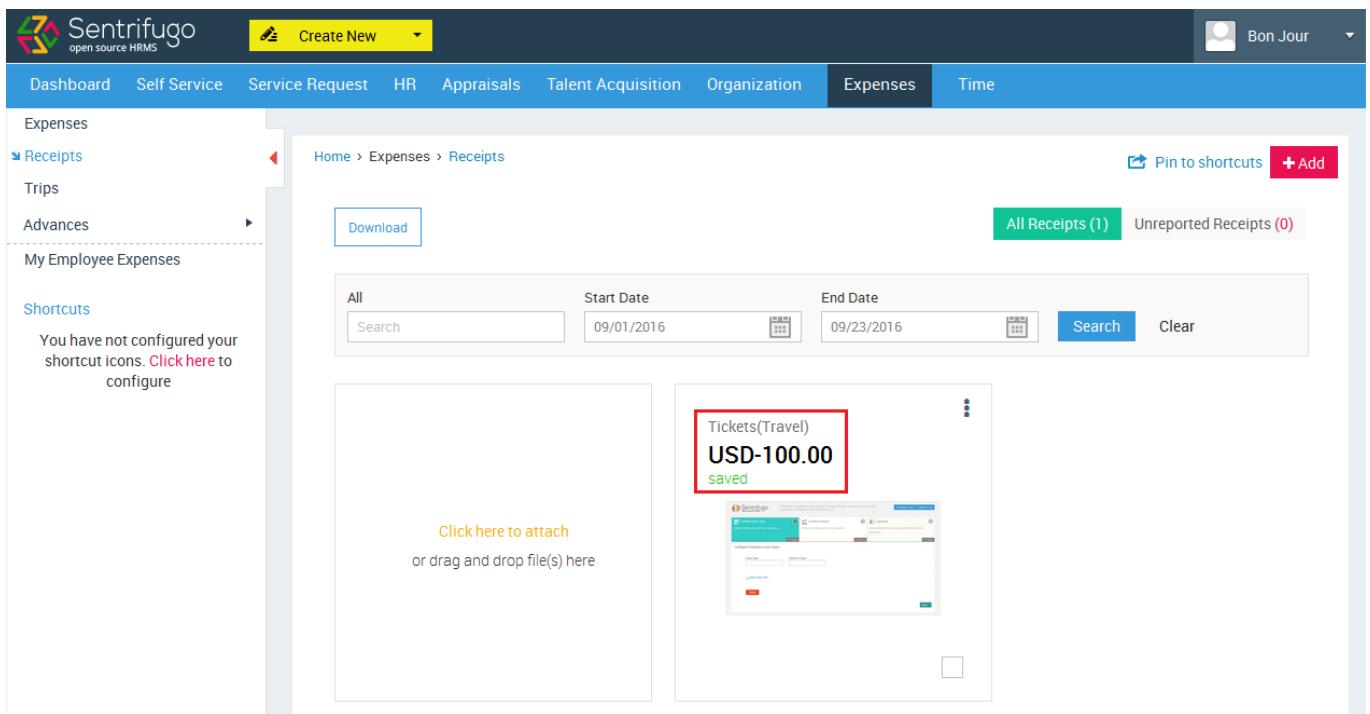
Please refer Figure 184



Figure 184

e. Click Add to Expense.

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



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

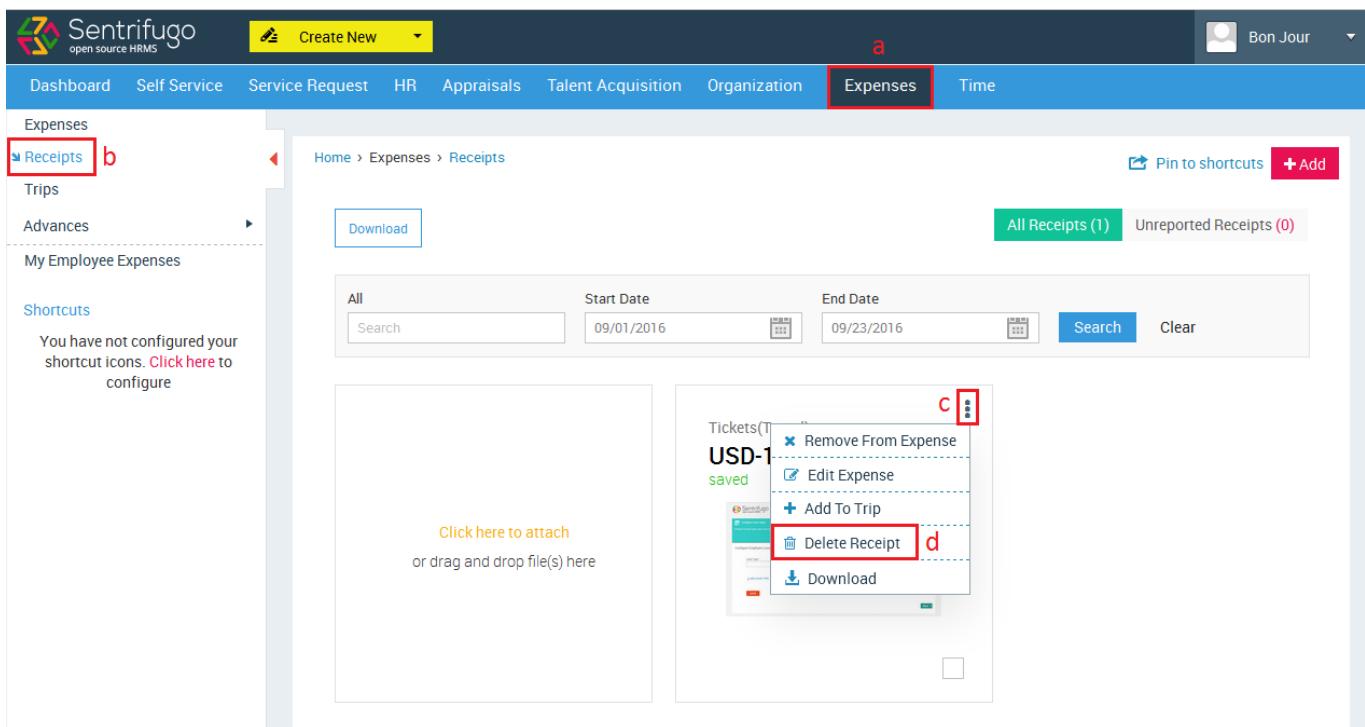


Figure 185

- 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

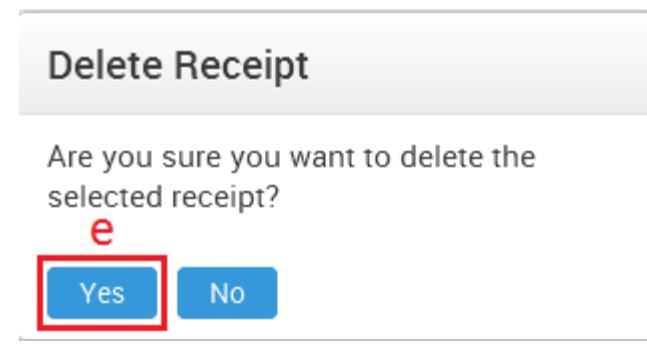


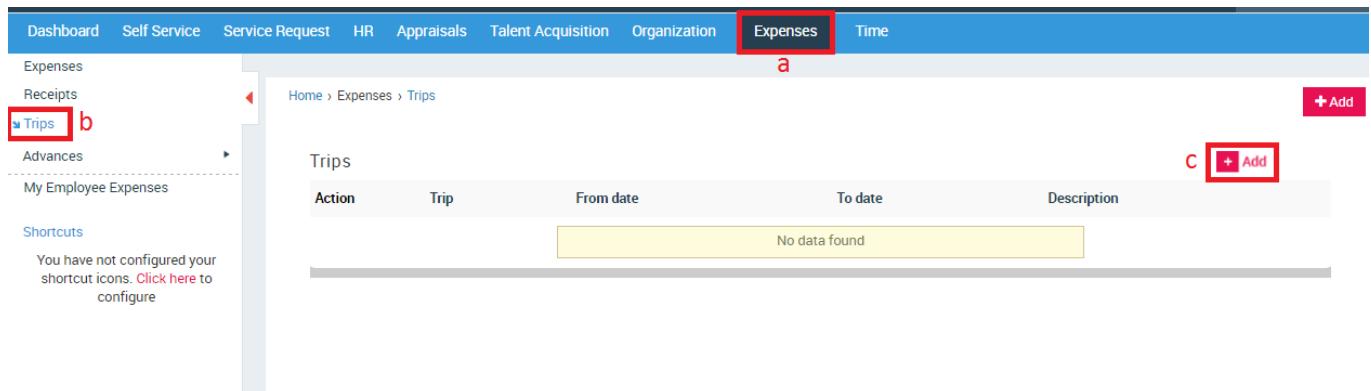
Figure 186

- Click **YES** Button

14.14 How do I create a Trip?

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

Please refer Figure 187

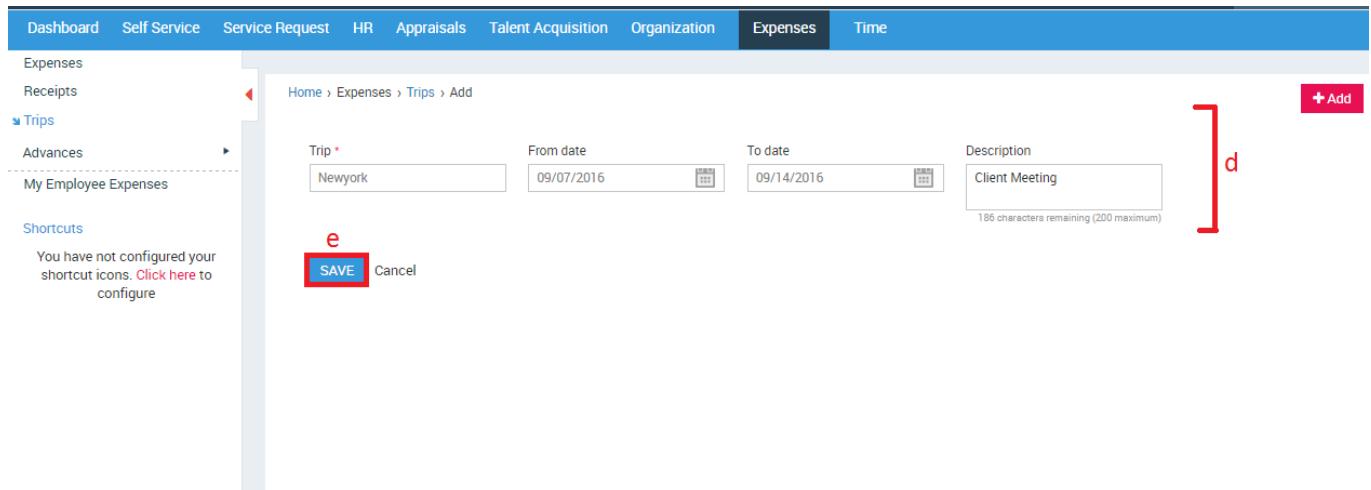


The screenshot shows the Sentrifugo web interface. The top navigation bar has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses (which is highlighted with a red box), and Time. On the left, a sidebar menu includes Expenses, Receipts, **Trips** (highlighted with a red box labeled 'b'), Advances, and My Employee Expenses. Below the sidebar is a 'Shortcuts' section with a note about configuring icons. The main content area shows a 'Trips' list with columns for Action, Trip, From date, To date, and Description. A message 'No data found' is displayed. In the top right corner of the content area, there is a '+ Add' button (highlighted with a red box labeled 'c').

Figure 187

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

Please refer Figure 188



This screenshot shows the 'Add Trip' form. The top navigation bar and sidebar are identical to Figure 187. The main form has fields for Trip (with 'Newyork' entered), From date (09/07/2016) and To date (09/14/2016), and a large Description field containing 'Client Meeting'. A note below the description says '186 characters remaining (200 maximum)'. At the bottom of the form are 'SAVE' and 'Cancel' buttons. A red bracket labeled 'd' points to the Description field, and a red box labeled 'e' points to the 'SAVE' button.

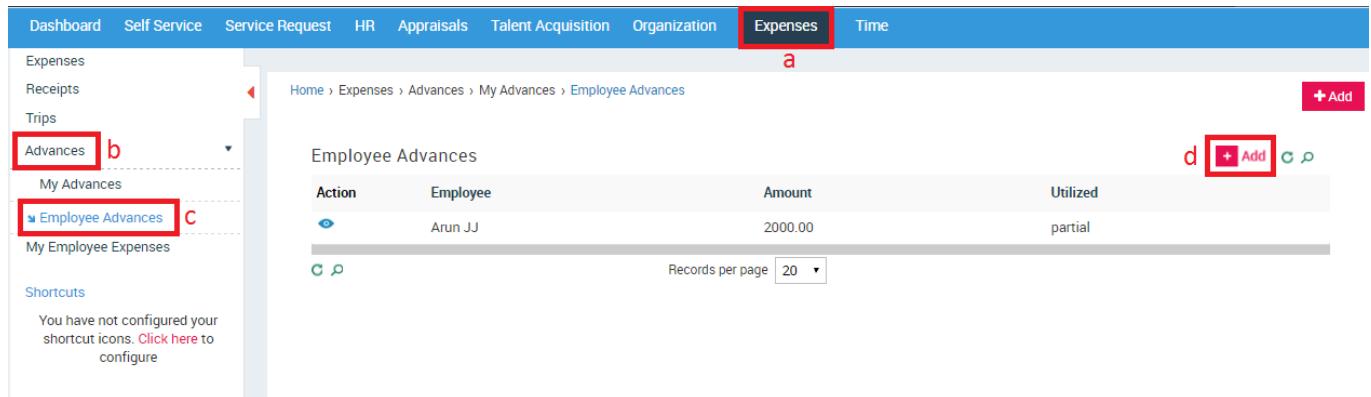
Figure 188

- 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



Action	Employee	Amount	Utilized
	Arun JJ	2000.00	partial

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

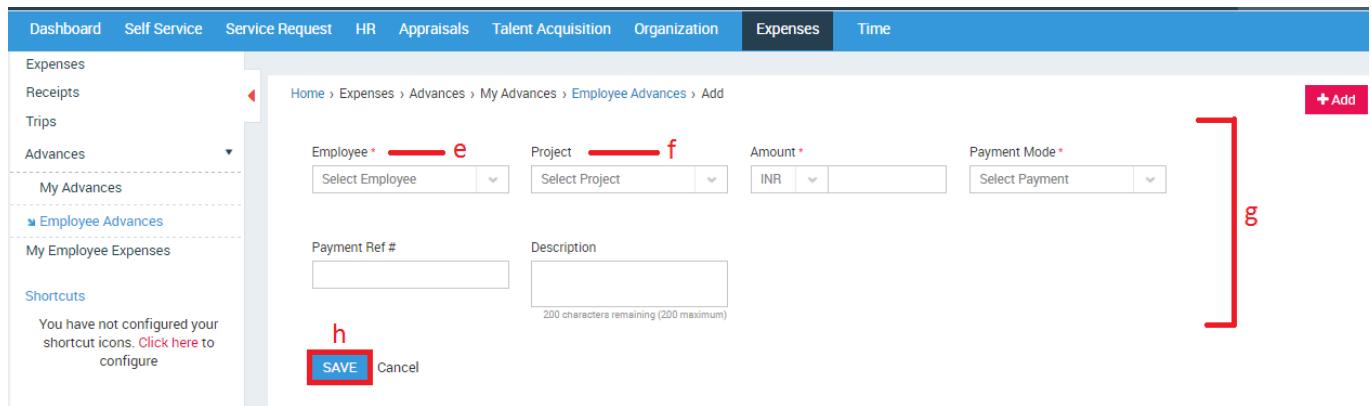


Figure 190

- 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

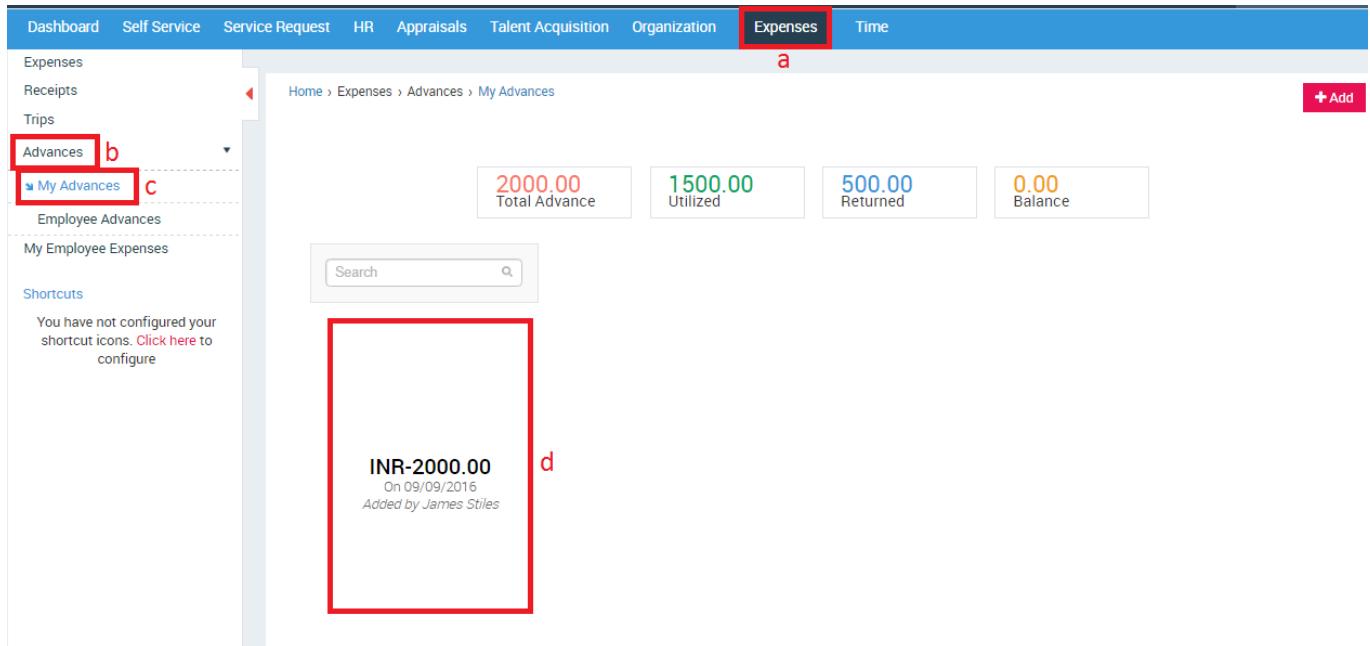


Figure 191

- 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

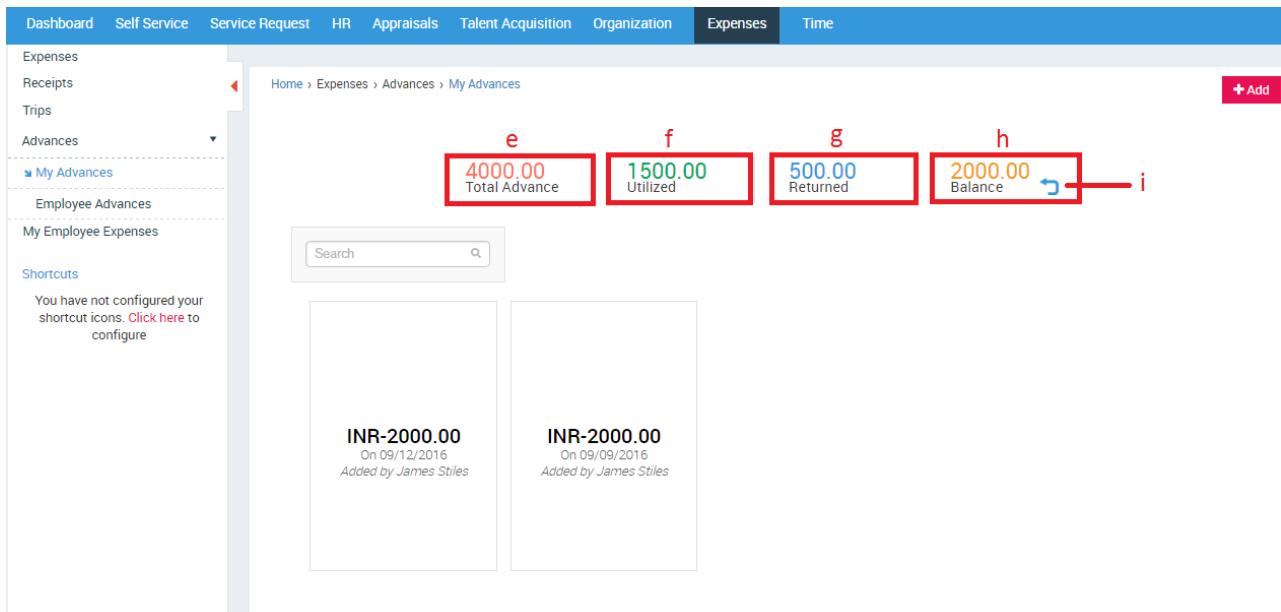
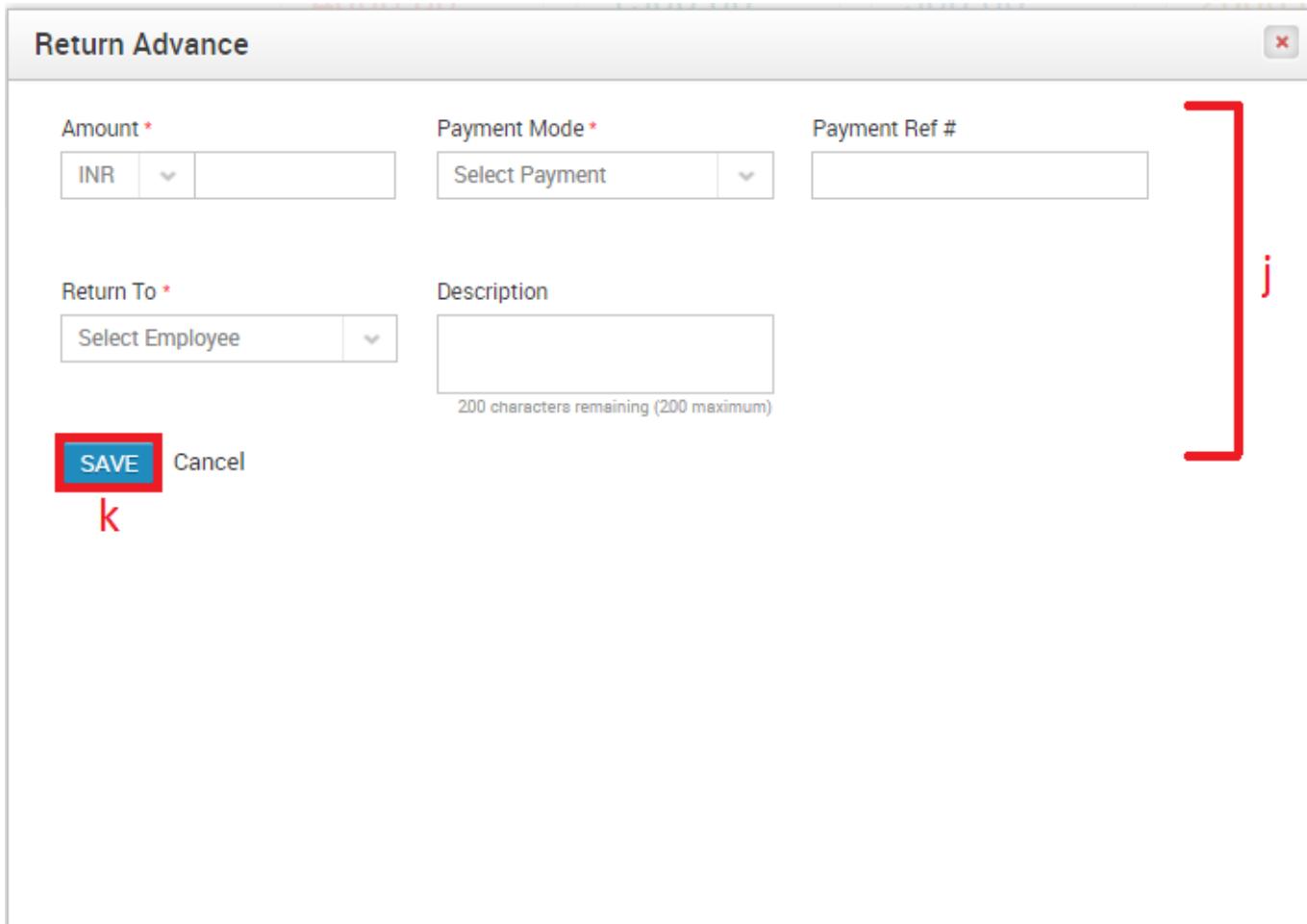


Figure 192

- 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	Select Payment	
Return To *	Description	
Select Employee	<input type="text"/> <small>200 characters remaining (200 maximum)</small>	
<input type="button" value="SAVE"/> <input type="button" value="Cancel"/>		

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

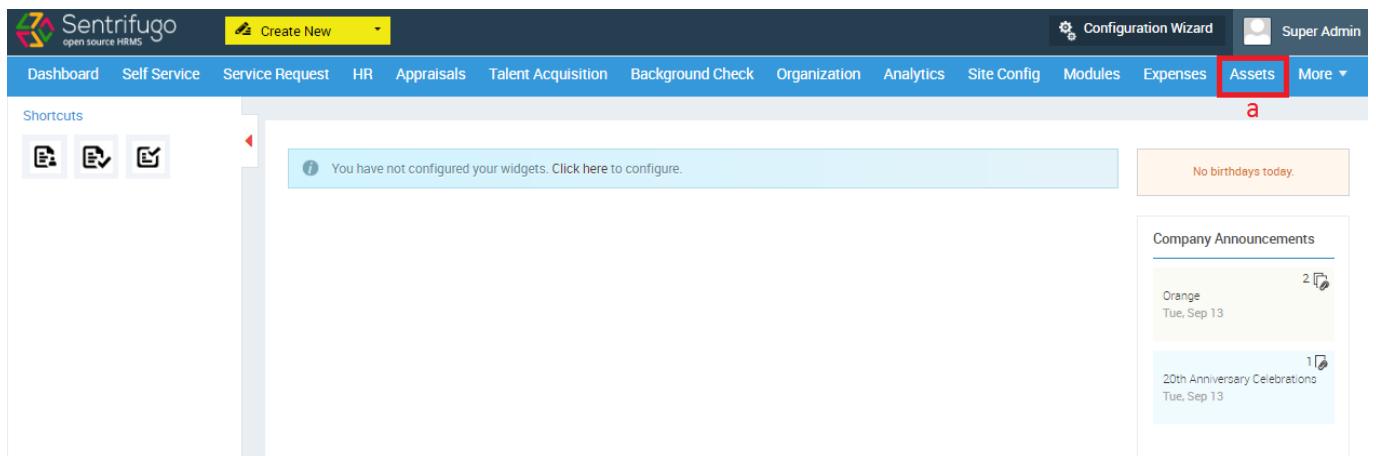


Figure 194

- Click **Assets** in the top menu

Please refer Figure 195

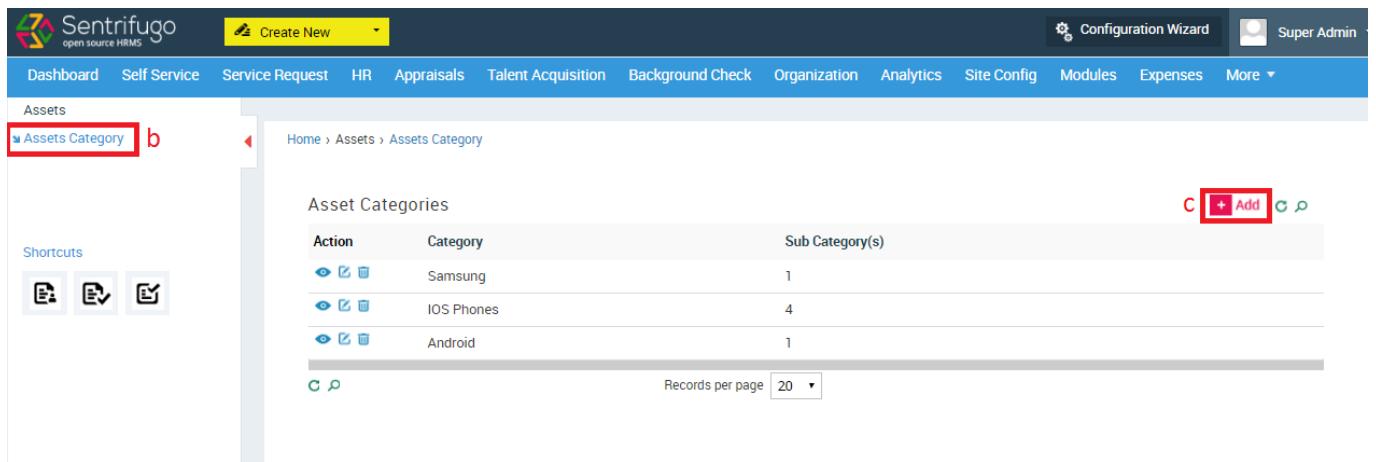


Figure 195

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

Please refer Figure 196

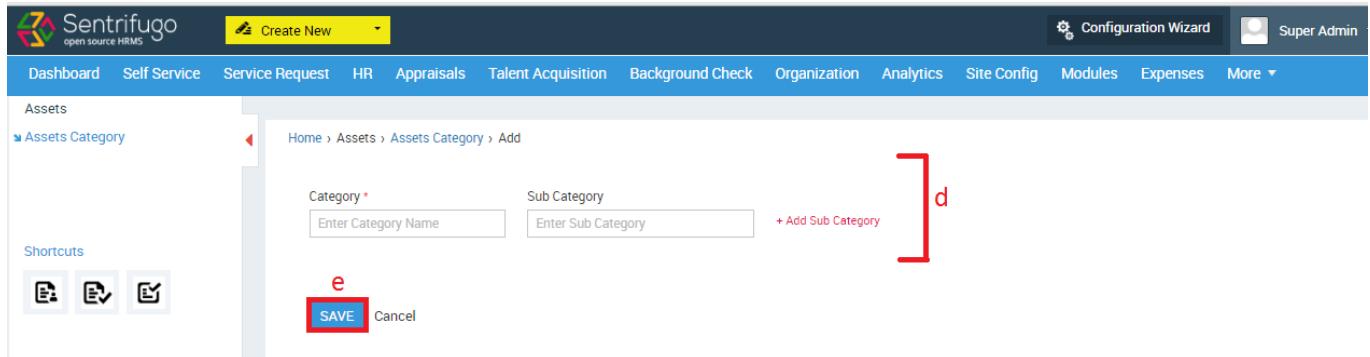


Figure 196

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

15.2 How do I add an Asset?

Please refer Figure 197

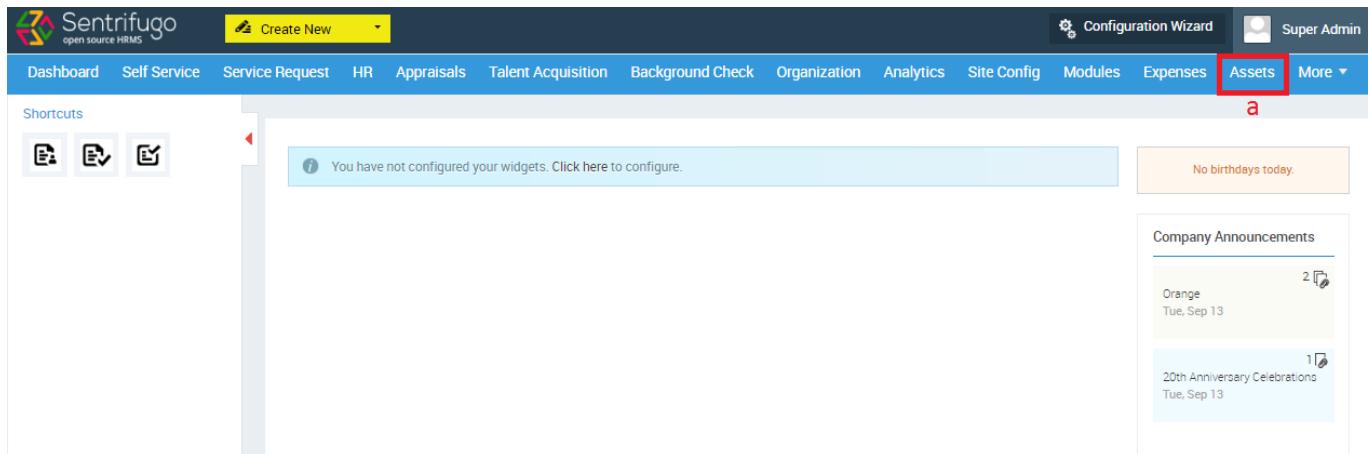


Figure 197

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

Please refer Figure 198

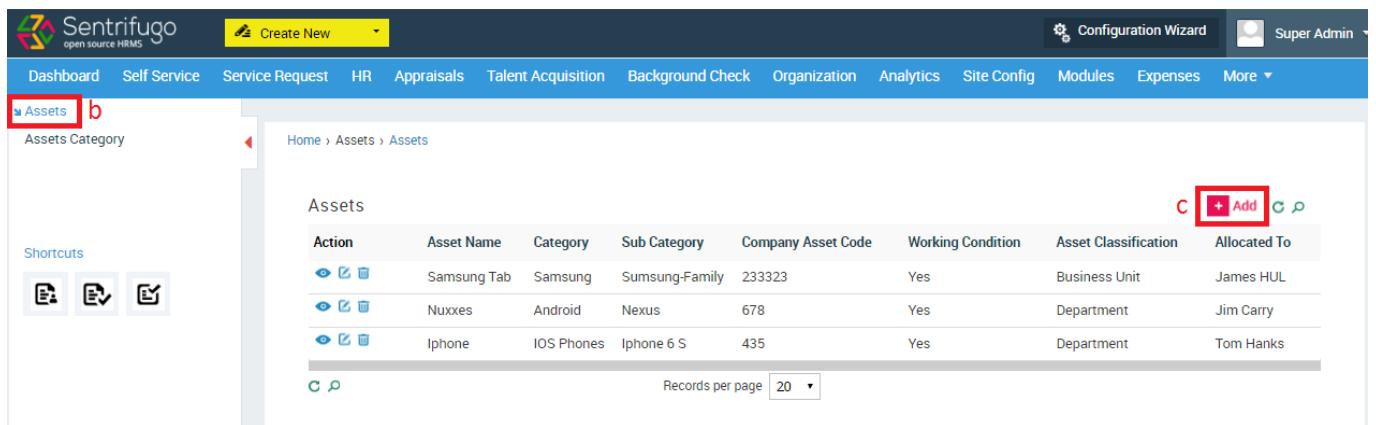


Figure 198

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

Please refer Figure 199

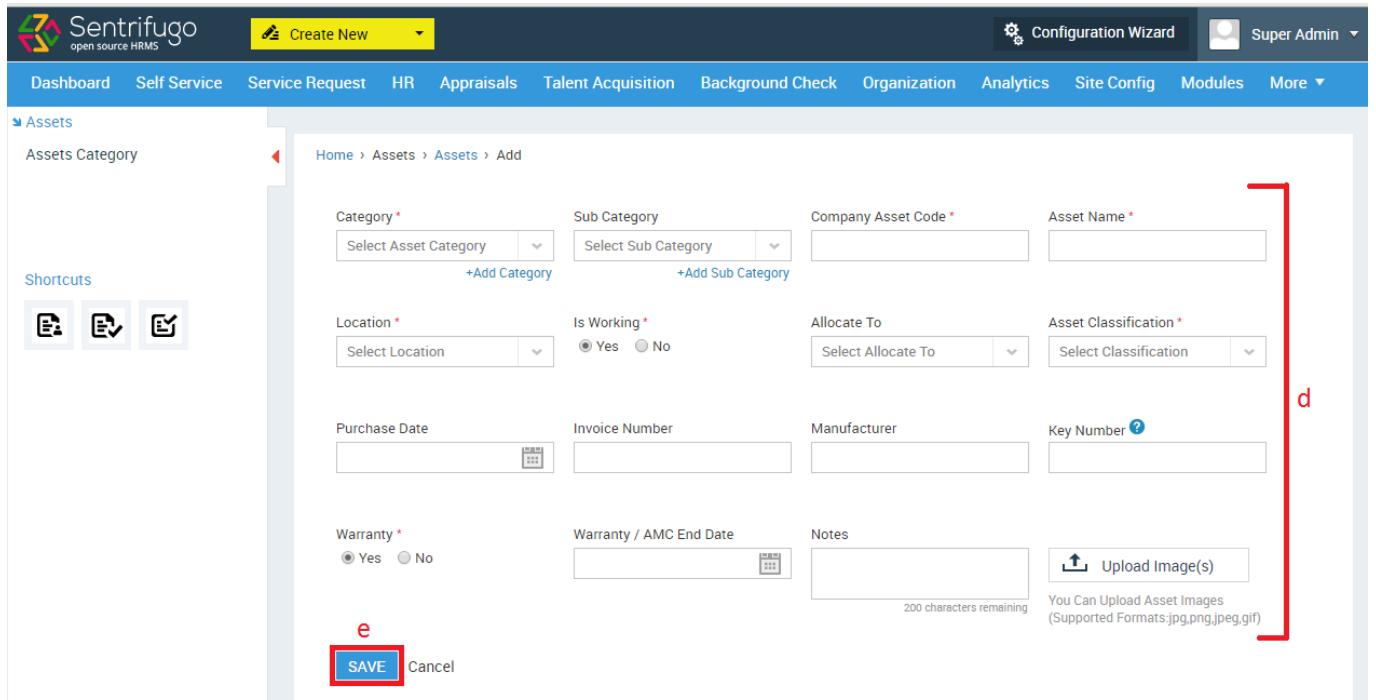
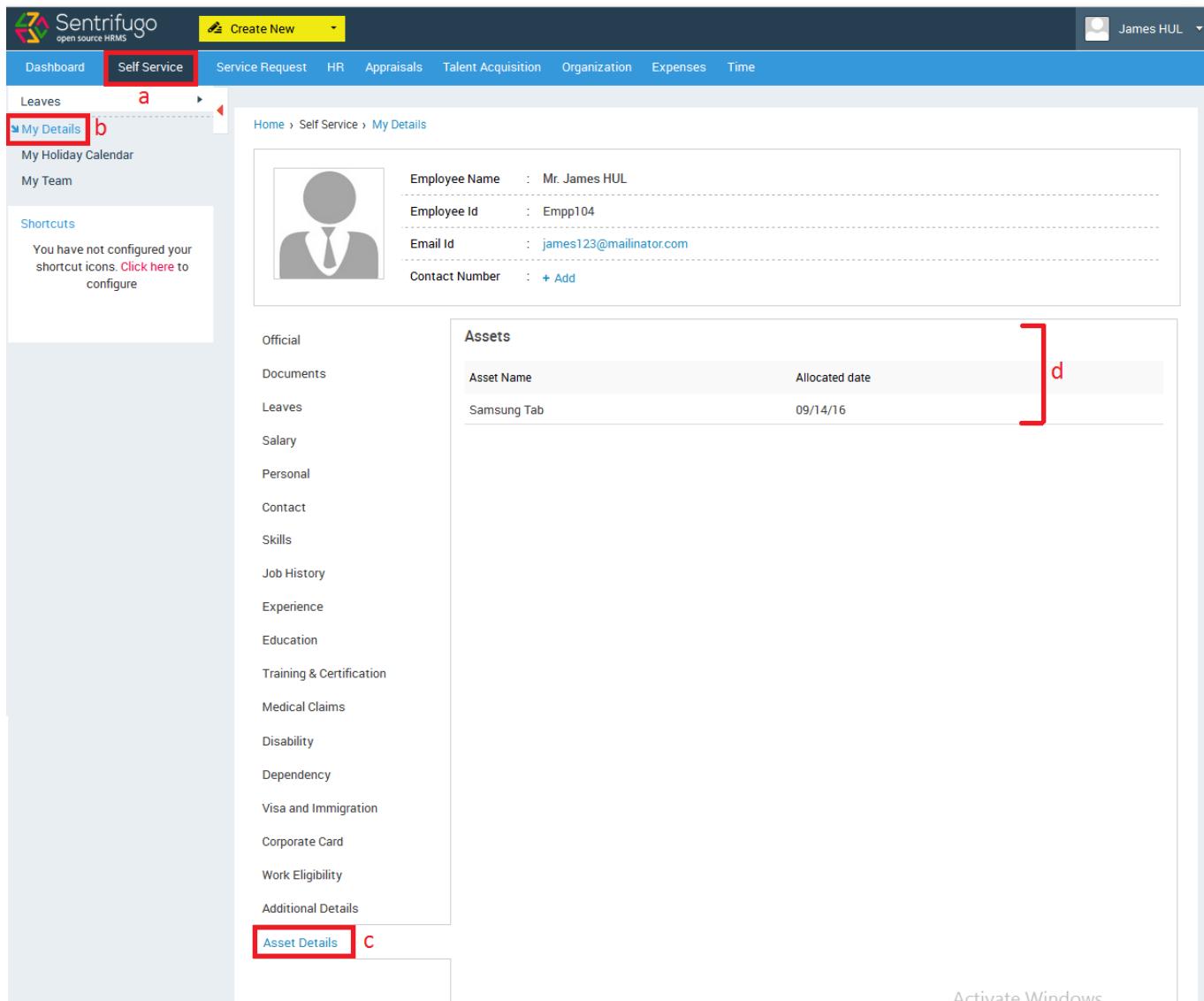


Figure 199

- 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 HRMS application interface. At the top, there is a navigation bar with links for Dashboard, Self Service (highlighted with a red box and labeled 'a'), Service Request, HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. A 'Create New' button and a user profile for James HUL are also present.

The main content area shows a breadcrumb navigation: Home > Self Service > My Details. On the left, a sidebar titled 'My Details' (highlighted with a red box and labeled 'b') contains a user icon and a message: 'You have not configured your shortcut icons. Click here to configure'. Below this are various 'Shortcuts' options: Official, Documents, Leaves, Salary, Personal, Contact, Skills, Job History, Experience, Education, Training & Certification, Medical Claims, Disability, Dependency, Visa and Immigration, Corporate Card, Work Eligibility, and Additional Details. The 'Asset Details' option is highlighted with a red box and labeled 'c'.

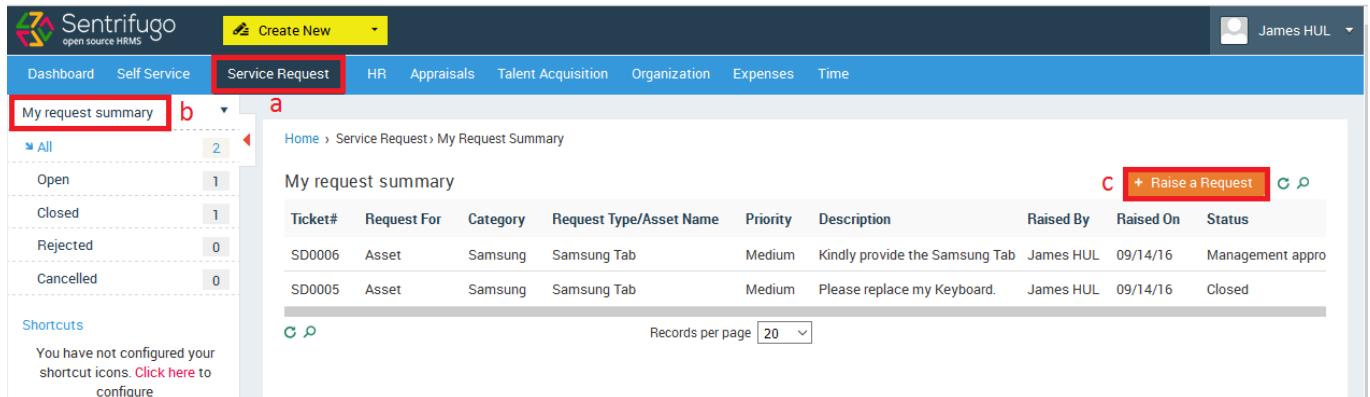
The right side displays a table titled 'Assets' with two columns: 'Asset Name' and 'Allocated date'. The table contains one row: 'Samsung Tab' with an 'Allocated date' of '09/14/16'. A red bracket labeled 'd' spans from the 'Assets' title to the end of the table row.

Figure 200

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

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

Please refer Figure 201

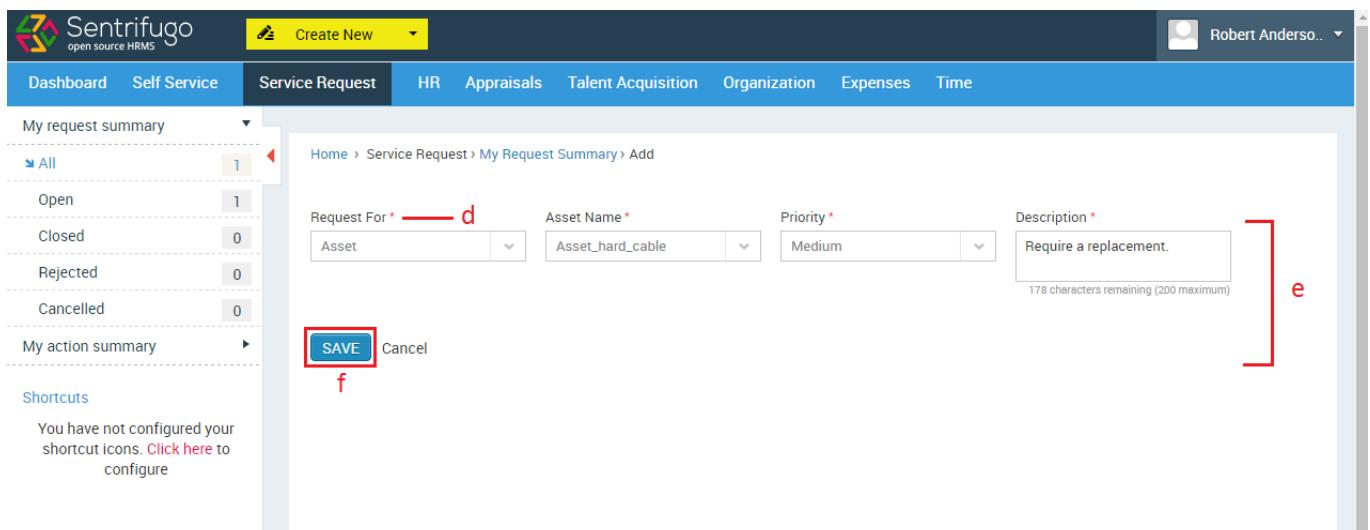


The screenshot shows the Sentrifugo web interface. At the top, there's a navigation bar with links for Dashboard, Self Service, Service Request (which is highlighted with a red box), HR, Appraisals, Talent Acquisition, Organization, Expenses, and Time. On the far right, it shows a user profile for James HUL. Below the navigation bar, there's a sidebar on the left with sections for 'My request summary' (highlighted with a red box), 'Shortcuts' (with a note about unconfigured icons), and a table showing request counts for Open, Closed, Rejected, and Cancelled requests. The main content area is titled 'My request summary' and shows a list of two service requests. The first request is for an Asset named Samsung Tab with a priority of Medium, raised by James HUL on 09/14/16. The second request is for an Asset named Samsung Tab with a priority of Medium, raised by James HUL on 09/14/16 and is marked as Closed. There are buttons for 'Records per page' and a search icon. On the right side of the main content area, there's a red box around the '+ Raise a Request' button.

Figure 201

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

Please refer Figure 202



The screenshot shows the 'Add' page for a service request. The top navigation bar is identical to Figure 201. The sidebar on the left shows 'My request summary' (highlighted with a red box) and 'My action summary'. The main content area is titled 'Add' and shows a form for creating a new request. The 'Request For' field is highlighted with a red box and labeled 'd'. The 'Asset Name' dropdown is set to 'Asset_hard_cable' and is highlighted with a red box. The 'Priority' dropdown is set to 'Medium' and is highlighted with a red box. The 'Description' text area contains 'Require a replacement.' and is highlighted with a red box, with a red bracket labeled 'e' pointing to it. At the bottom left, there are 'SAVE' and 'Cancel' buttons, with the 'SAVE' button highlighted with a red box and labeled 'f'.

Figure 202

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

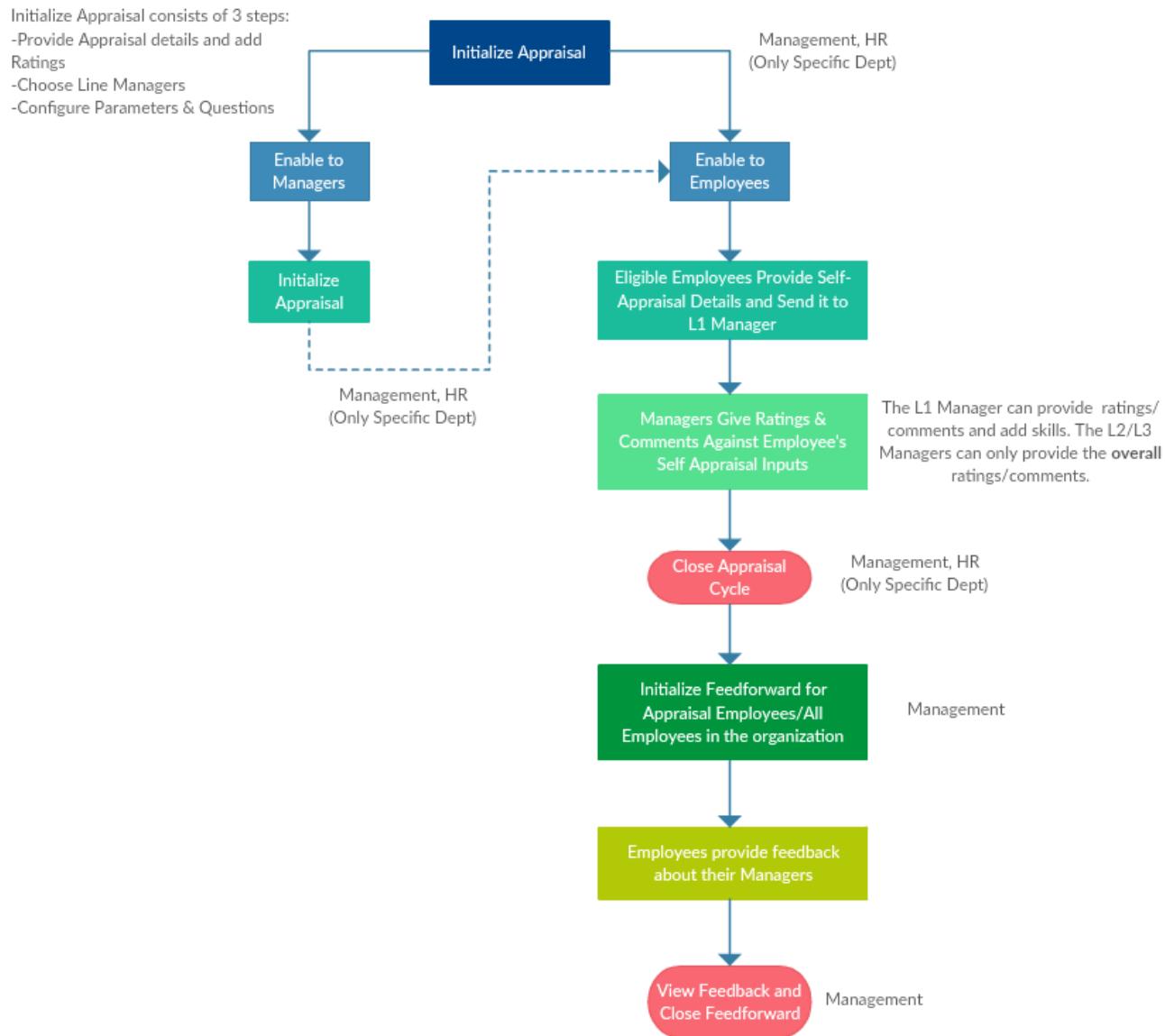


An asset name will only be populated if an asset is allocated to the employee. Also, please ensure the asset category is configured in:

Service Request > Configuration > Settings > +Add

16. Appraisals

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



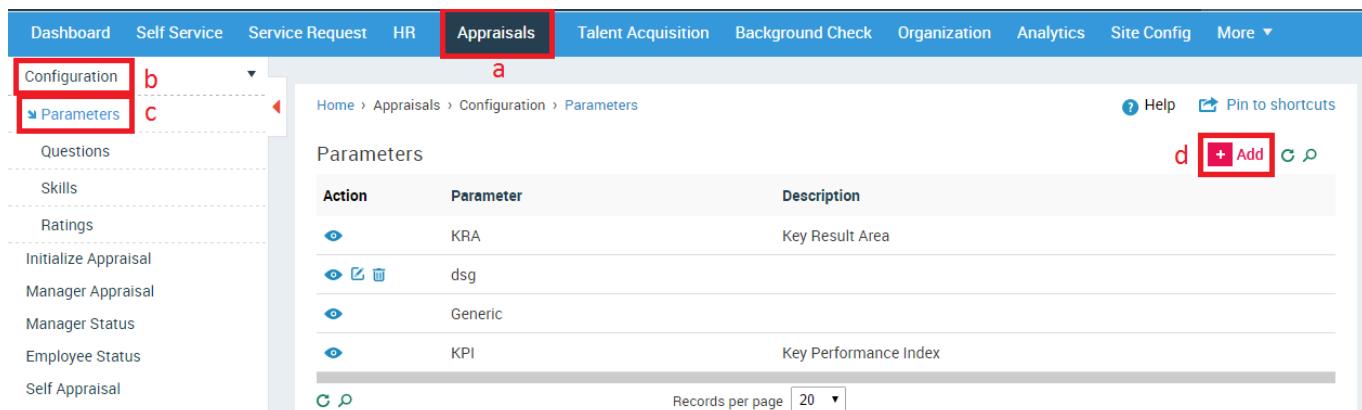
Process Description:

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

16.1 How do I add Parameters?

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

Please refer Figure 203



Action	Parameter	Description
	KRA	Key Result Area
	dsg	
	Generic	
	KPI	Key Performance Index

Figure 203

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

Please refer Figure 204

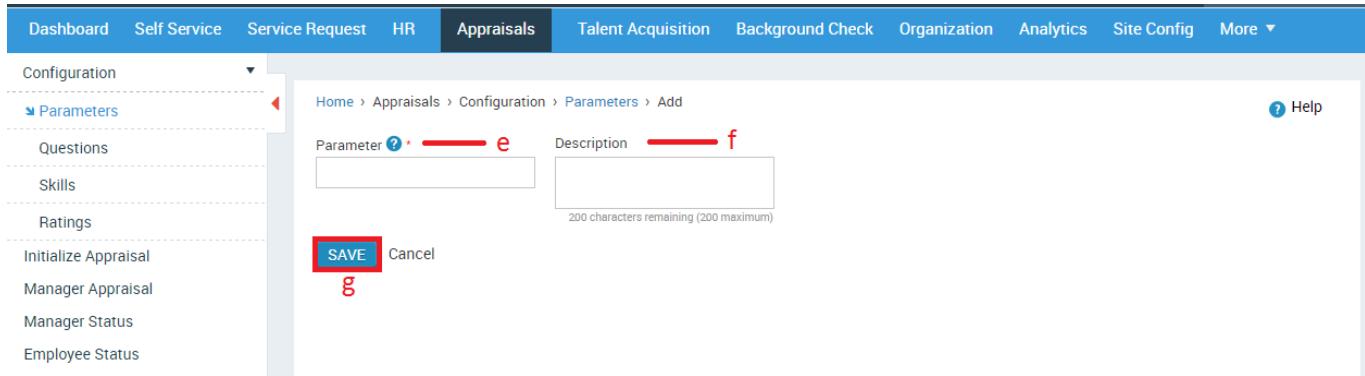


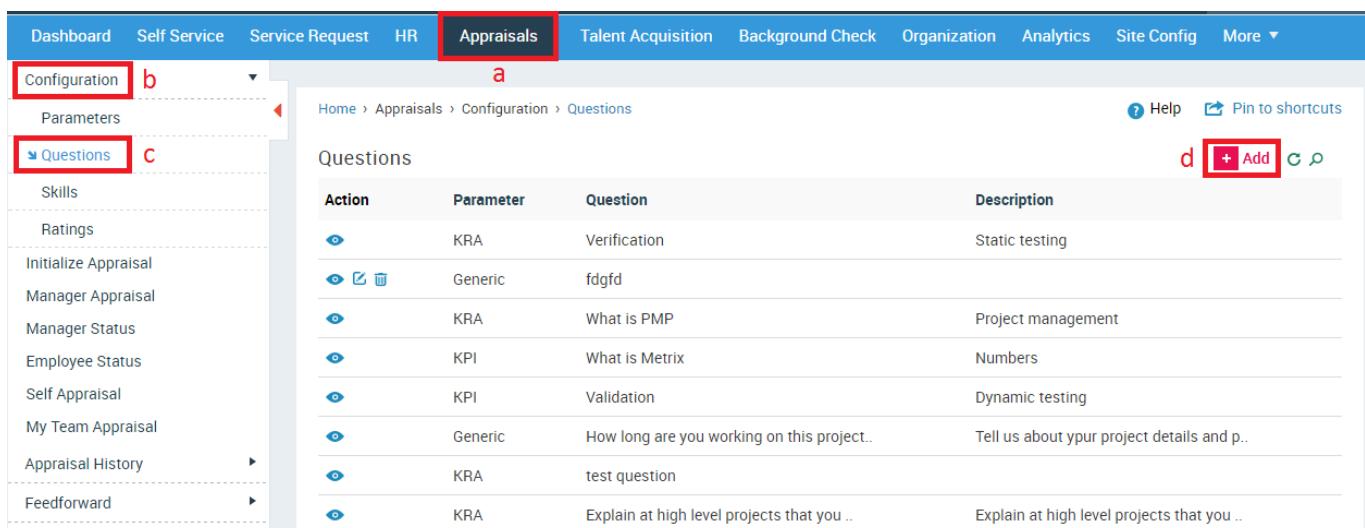
Figure 204

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

16.2 How do I add Questions?

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

Please refer Figure 205

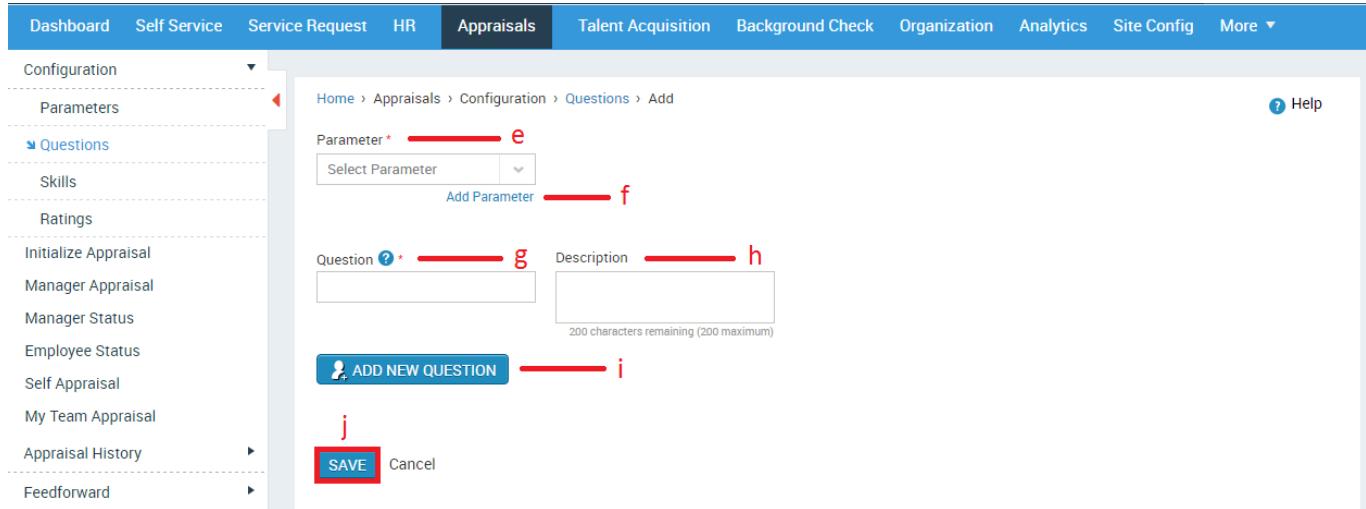


Action	Parameter	Question	Description
	KRA	Verification	Static testing
	Generic	fdgfd	
	KRA	What is PMP	Project management
	KPI	What is Metrix	Numbers
	KPI	Validation	Dynamic testing
	Generic	How long are you working on this project..	Tell us about your project details and p..
	KRA	test question	
	KRA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

Figure 205

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

Please refer Figure 206



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (which is currently selected and highlighted in dark blue), Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the far right of the top bar is a Help link. The left sidebar under the Configuration heading has several options: Parameters, Questions (which is selected and highlighted with a blue arrow icon), Skills, Ratings, Initialize Appraisal, Manager Appraisal, Manager Status, Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, and Feedforward. The main content area displays a form for adding a new question. It includes fields for 'Parameter*' (with a dropdown menu labeled 'e'), 'Select Parameter' (with a dropdown menu labeled 'f'), 'Question ? *' (input field labeled 'g'), 'Description' (input field labeled 'h'), and a note indicating '200 characters remaining (200 maximum)'. Below these fields are two buttons: a blue 'ADD NEW QUESTION' button with a person icon (labeled 'i') and a red 'SAVE' button with a blue border (labeled 'j'). At the bottom of the form is a 'Cancel' link.

Figure 206

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

16.3 How do I add Skills?

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

Please refer Figure 207

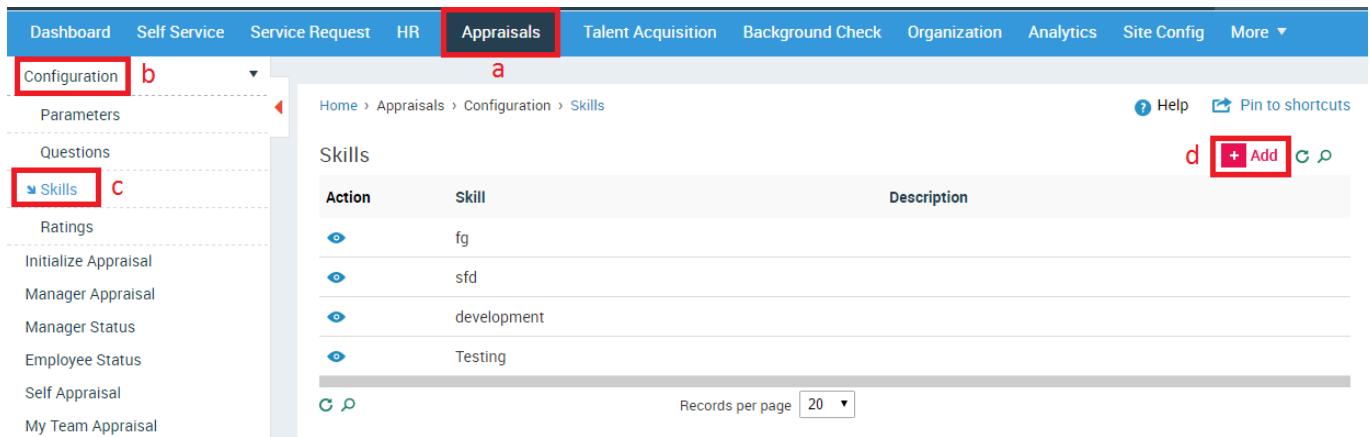


Figure 207

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

Please refer Figure 208

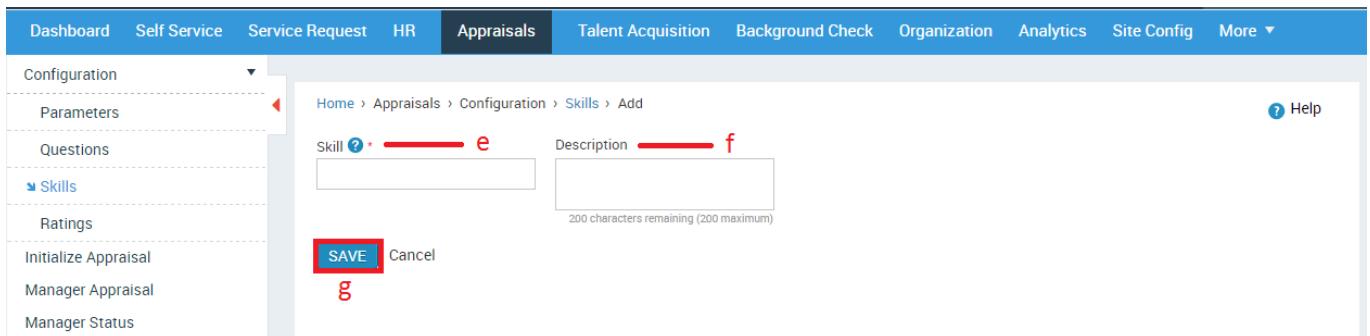


Figure 208

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

16.4 How do I add Ratings?

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

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

Please refer Figure 209

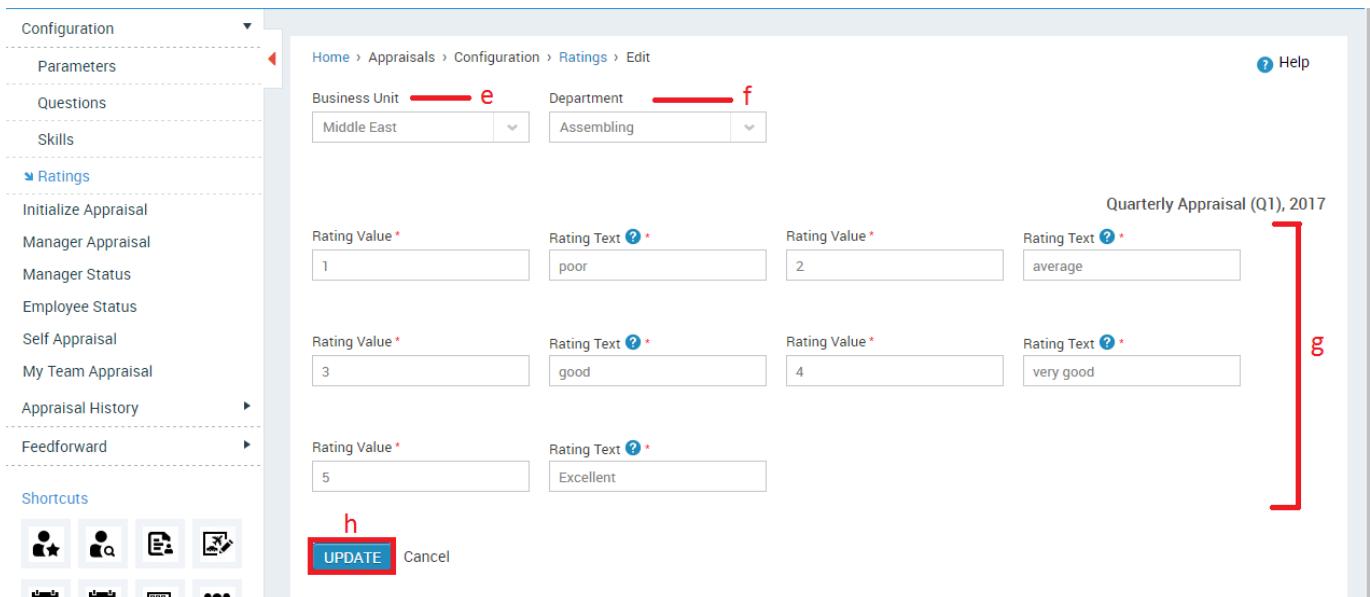


The screenshot shows the 'Appraisals' tab selected in the top menu. On the left, a sidebar has 'Configuration' expanded, with 'Ratings' highlighted. The main content area displays a table of 'Ratings' with columns: Action, Appraisal Period, Business Unit, Department, Rating Type, Appraisal Status, and Process Status. Two rows are shown: 'Q2 Appraisal, 2018' for Human Resource and 'Q1 Appraisal, 2017' for Quality Assurance. A red box labeled 'b' highlights 'Configuration' in the sidebar, 'a' highlights the 'Appraisals' tab, 'c' highlights 'Ratings' in the sidebar, and 'd' highlights the '+ Add' button.

Figure 209

- Click **Appraisals** in the top menu
- Click **Configuration** on the left menu panel
- Click **Ratings** in the submenu
- Click **Edit** icon on the right side

Please refer Figure 210



The screenshot shows the 'Edit' screen for 'Ratings'. The left sidebar shows 'Configuration' expanded, with 'Ratings' highlighted. The main area shows dropdowns for 'Business Unit' (Middle East) and 'Department' (Assembling). Below are three rows of rating values and texts. A red bracket labeled 'g' spans the 'Rating Text' fields. A red box labeled 'e' highlights 'Business Unit', 'f' highlights 'Department', and 'h' highlights the 'UPDATE' button. The title bar says 'Quarterly Appraisal (Q1), 2017'.

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

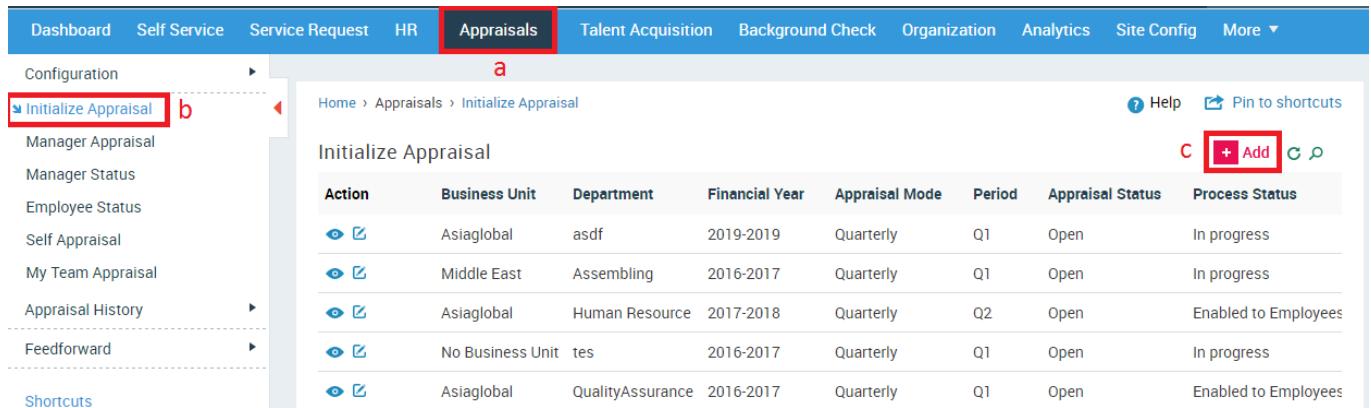
Figure 210

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

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

16.5 How do I Initialize an Appraisal process?

Please refer Figure 211

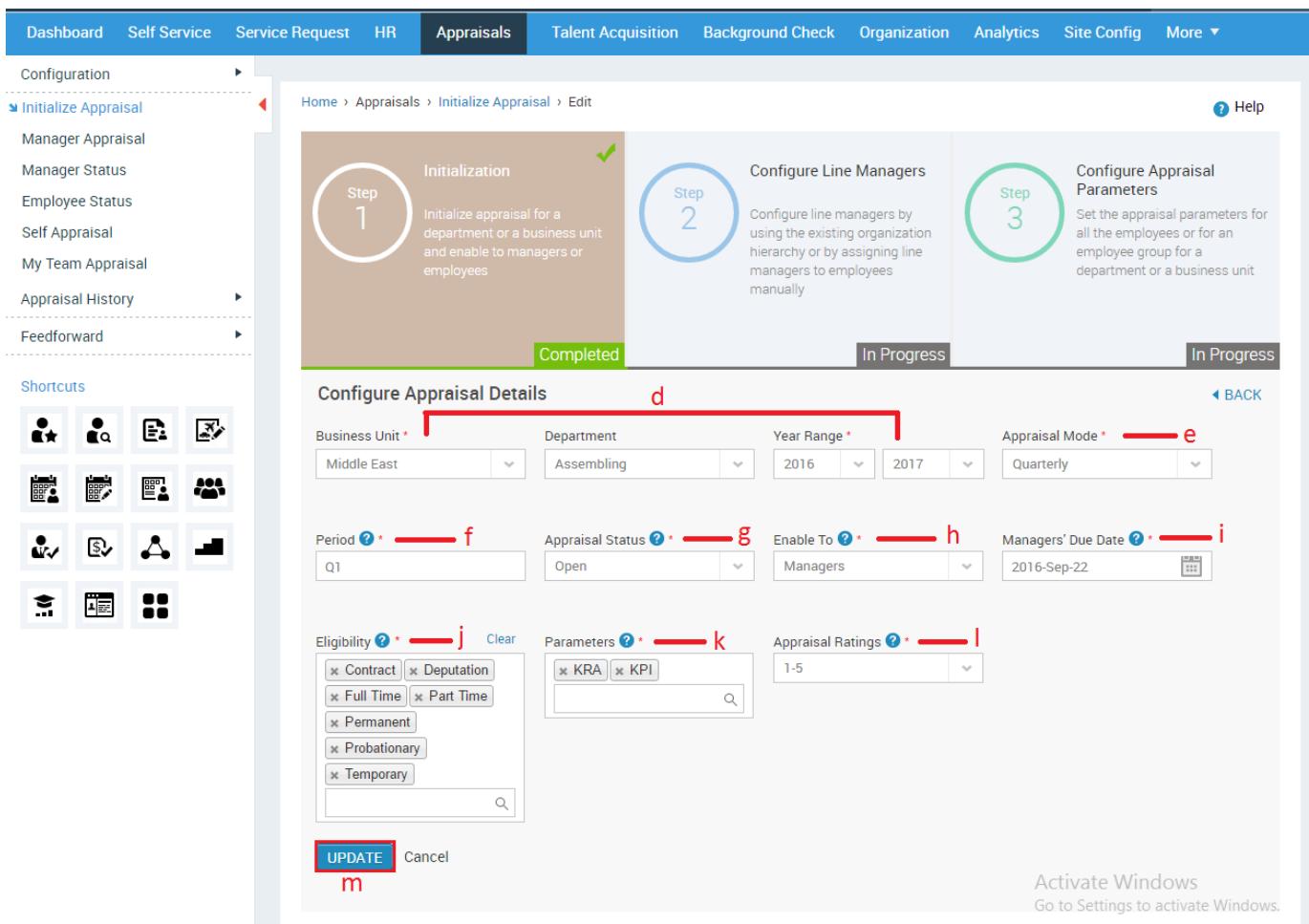


The screenshot shows the Sentrifugo HRMS application interface. The top navigation bar includes tabs for Dashboard, Self Service, Service Request, HR, Appraisals (which is highlighted with a red box and labeled 'a'), Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar menu shows Configuration, Manager Appraisal, Manager Status, Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, Feedforward, and Shortcuts. Under Configuration, 'Initialize Appraisal' is highlighted with a red box and labeled 'b'. The main content area displays a table titled 'Initialize Appraisal' with columns: Action, Business Unit, Department, Financial Year, Appraisal Mode, Period, Appraisal Status, and Process Status. Five rows of data are listed, each with an eye icon and a edit icon. The first row: Action (eye/edit), Business Unit (Asiaglobal), Department (asdf), Financial Year (2019-2019), Appraisal Mode (Quarterly), Period (Q1), Appraisal Status (Open), Process Status (In progress). The second row: Action (eye/edit), Business Unit (Middle East), Department (Assembling), Financial Year (2016-2017), Appraisal Mode (Quarterly), Period (Q1), Appraisal Status (Open), Process Status (In progress). The third row: Action (eye/edit), Business Unit (Asiaglobal), Department (Human Resource), Financial Year (2017-2018), Appraisal Mode (Quarterly), Period (Q2), Appraisal Status (Open), Process Status (Enabled to Employees). The fourth row: Action (eye/edit), Business Unit (No Business Unit), Department (tes), Financial Year (2016-2017), Appraisal Mode (Quarterly), Period (Q1), Appraisal Status (Open), Process Status (In progress). The fifth row: Action (eye/edit), Business Unit (Asiaglobal), Department (QualityAssurance), Financial Year (2016-2017), Appraisal Mode (Quarterly), Period (Q1), Appraisal Status (Open), Process Status (Enabled to Employees). In the top right corner of the main content area, there are three buttons: a question mark icon for Help, a pin icon for Pin to shortcuts, and a red box labeled 'c' containing a '+Add' button.

Figure 211

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

Please refer Figure 212



Completed

In Progress

In Progress

Configure Appraisal Details

d

e

f

g

h

i

j

k

l

m

Activate Windows
Go to Settings to activate Windows.

Figure 212

Step 1: Initialization

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

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

Please refer Figure 213

 Ratings not added for the appraisal. [Click here](#) to configure ratings.

Figure 213

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

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

Step 2: Configure Line Managers

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

The Line Managers can be configured in two ways:

1. Choose by Organization Hierarchy

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

Please refer Figure 214

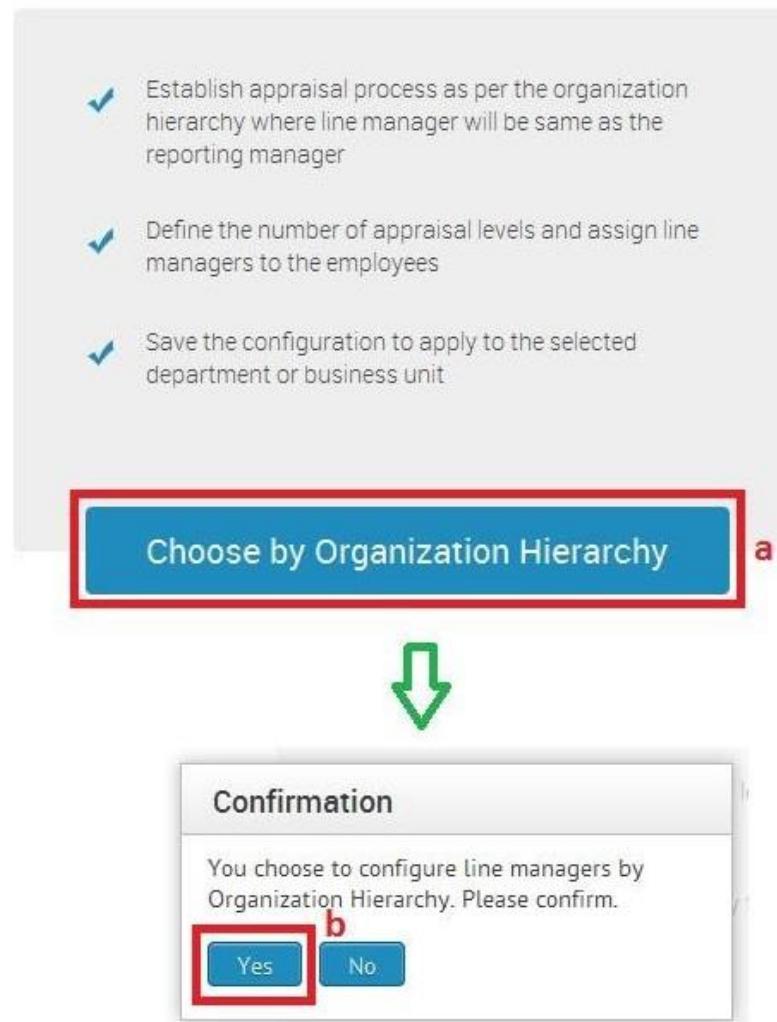


Figure 214

- Click **Choose by Organization Hierarchy** button

A small confirmation window will appear.

- Click **Yes** button

Please refer Figure 215

Home > Appraisals > Initialize Appraisal > Edit ? Help

Step
1

Initialization

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

Completed

Step
2

Configure Line Managers

Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually

In Progress

Step
3

Configure Appraisal Parameters

Set the appraisal parameters for all the employees or for an employee group for a department or a business unit

In Progress

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

Configure Line Managers by Organization Hierarchy ◀ BACK

<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">  Raj Davuluri SE0006 Admin Head </div>	L1 Manager
--	------------

 George Rimes
SE0011
Manager

Employee(s)
1

 Raj Davuluri
SE0006
Admin Head

 George Rimes
SE0011
Manager

C

Employee(s)
1


SAVE
d 

Figure 215

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

Please refer Figure 216

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Home > Appraisals > Initialize Appraisal > Edit ? Help

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

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

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

Completed
In Progress
In Progress

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

Configure Line Managers by Organization Hierarchy ◀ BACK

 Raj Davuluri
SE0006
Admin Head

L1 Manager

Employee(s)
1

2 3

Employees under L1 Manager

 George Rimes
(SE0011)
Manager

e

Configure Line Managers

Select Appraisal Levels

2 f

L2 Manager

Clarissa Franco - IT Director g

h SAVE CANCEL

Figure 216

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



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

2. Assign Line Managers to Employees

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

Please refer Figure 217

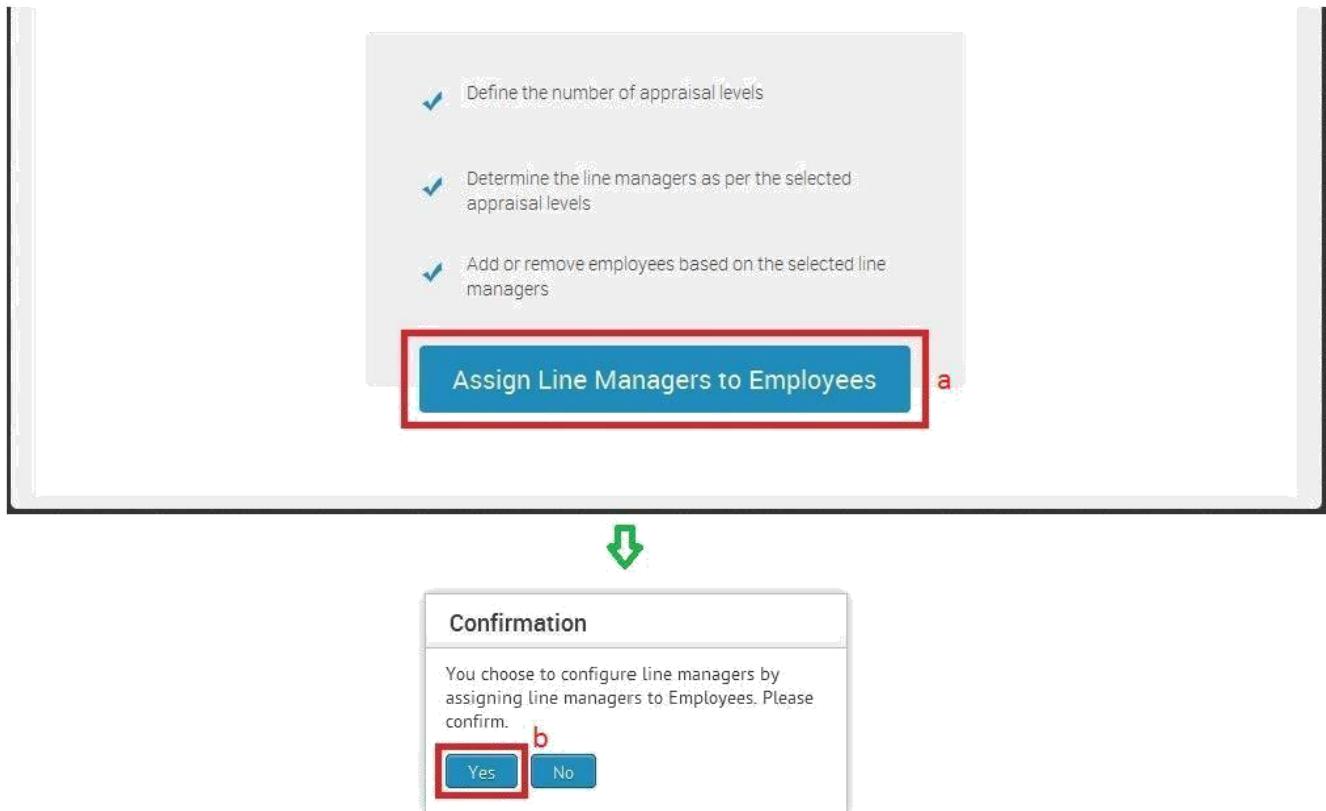


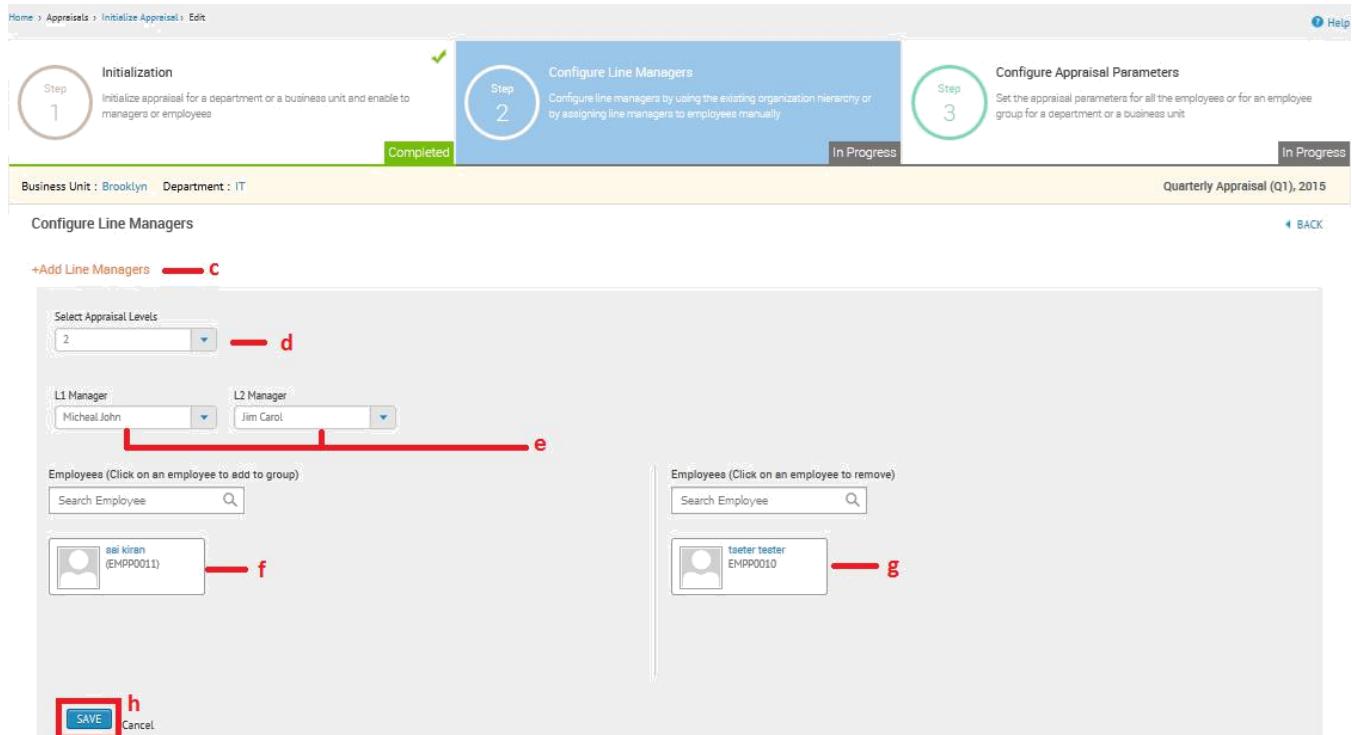
Figure 217

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

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 218



Home > Appraisals > Initialize Appraisal > Edit

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

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

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

Business Unit : Brooklyn Department : IT

Quarterly Appraisal (Q1), 2015

Configure Line Managers

+Add Line Managers — C

Select Appraisal Levels
2 — d

L1 Manager Michael John L2 Manager Jim Carol — e

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

sai kiran (EMPP0011) — f

Employees (Click on an employee to remove)
Search Employee

taefer tester (ENPP0010) — g

SAVE — h Cancel

Figure 218

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

Step 3: Configure Appraisal Parameters

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

1. All Employees

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

Please refer Figure 219

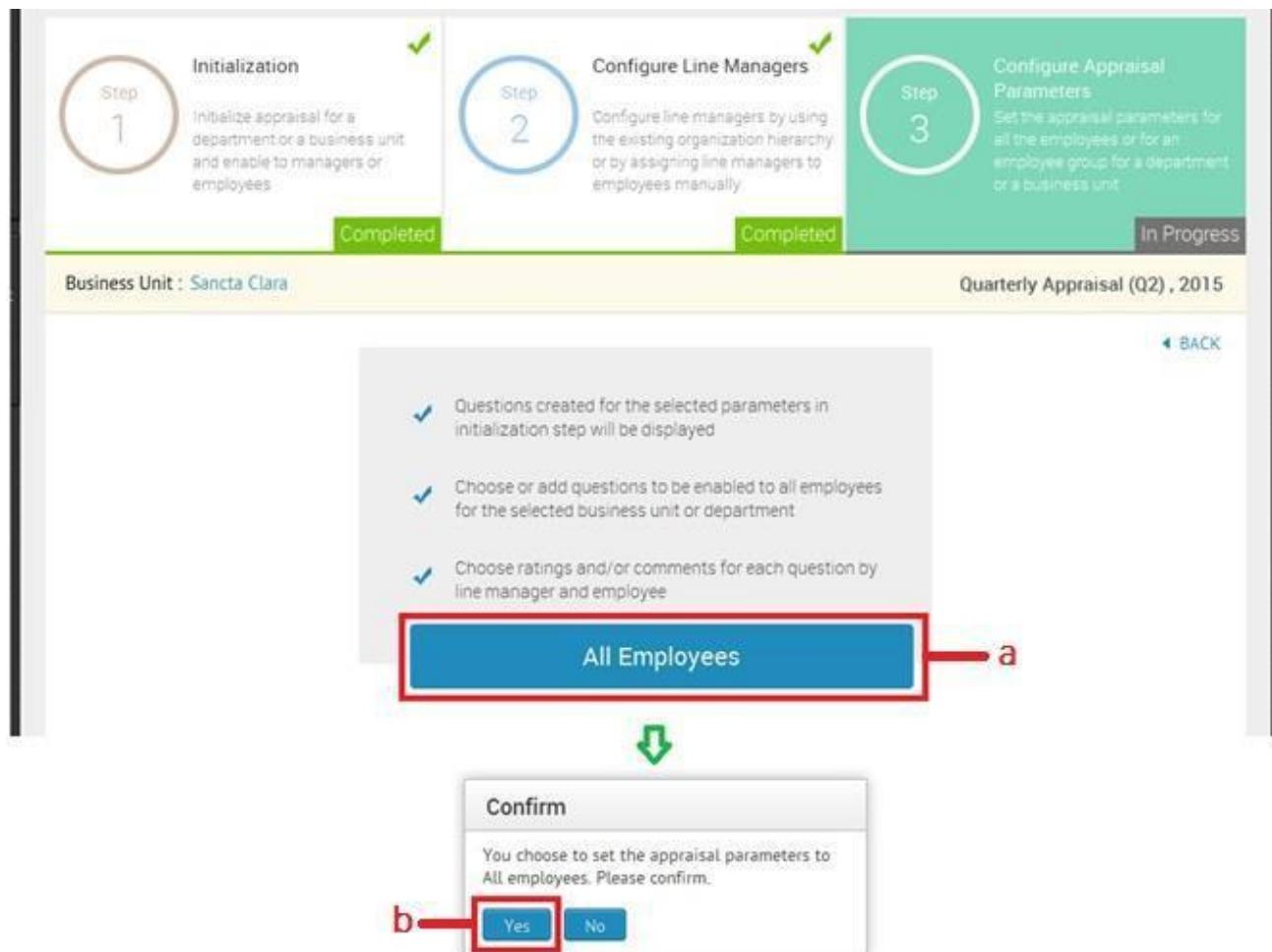


Figure 219

a. Click **All Employees**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 220

Home > Appraisals > Initialize Appraisal > Edit Help

Step 1 Initialization ✓ Completed

Step 2 Configure Line Managers ✓ Completed

Step 3 Configure Appraisal Parameters ✓ In Progress

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

Configure Questions For All Employees ◀ BACK

All | Selected g + Add New Question

Questions		
<input checked="" type="checkbox"/> Check All d	<input checked="" type="checkbox"/> Manager Comments e	<input checked="" type="checkbox"/> Manager Ratings f
<input checked="" type="checkbox"/> c	<input checked="" type="checkbox"/> Employee Comments g	<input checked="" type="checkbox"/> Employee Ratings h
<input checked="" type="checkbox"/> h	<input checked="" type="checkbox"/> Manager Comments i	<input checked="" type="checkbox"/> Manager Ratings
	<input checked="" type="checkbox"/> Employee Comments	<input checked="" type="checkbox"/> Employee Ratings

SAVE & INITIALIZE SAVE & INITIALIZE LATER DISCARD

Figure 220

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

2. Customized Employee Groups

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

Please refer Figure 222

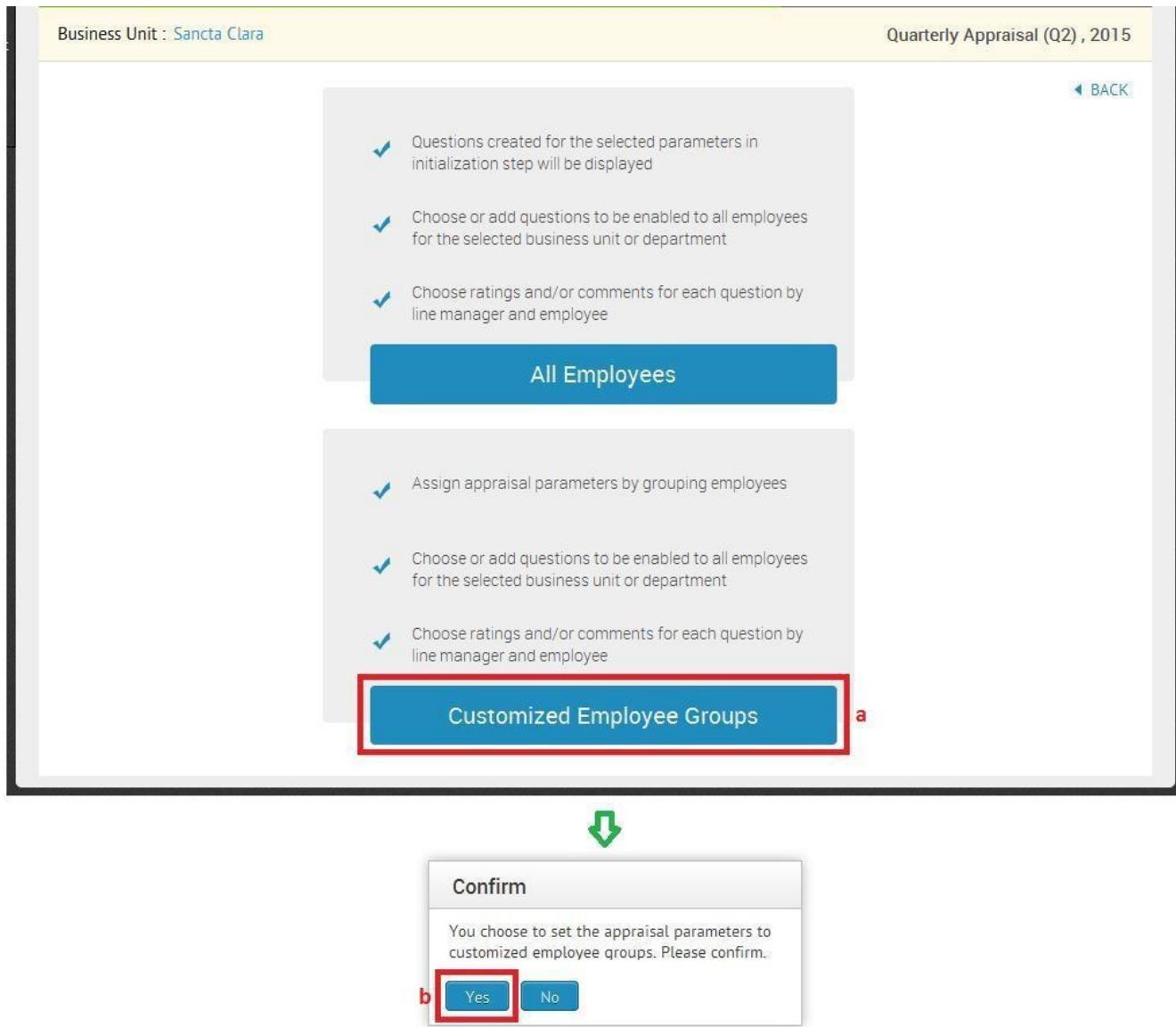


Figure 222

a. Click **Customized Employee Groups**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 223

Business Unit : Cyber Towers Department : Development Quarterly Appraisal (Q1) , 2015

Customized Employee Groups [◀ BACK](#)

[CREATE NEW GROUP](#) [DISCARD](#)

c

Group Name * **d**

Employees Selected Employees (0)

Search Employee Search Employee

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

Add employees to group.

All | Selected [+ Add New Question](#) **j**

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

[SAVE](#) **k** Close

l

Figure 223

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

Or

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

Or

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

Please refer Figure 224

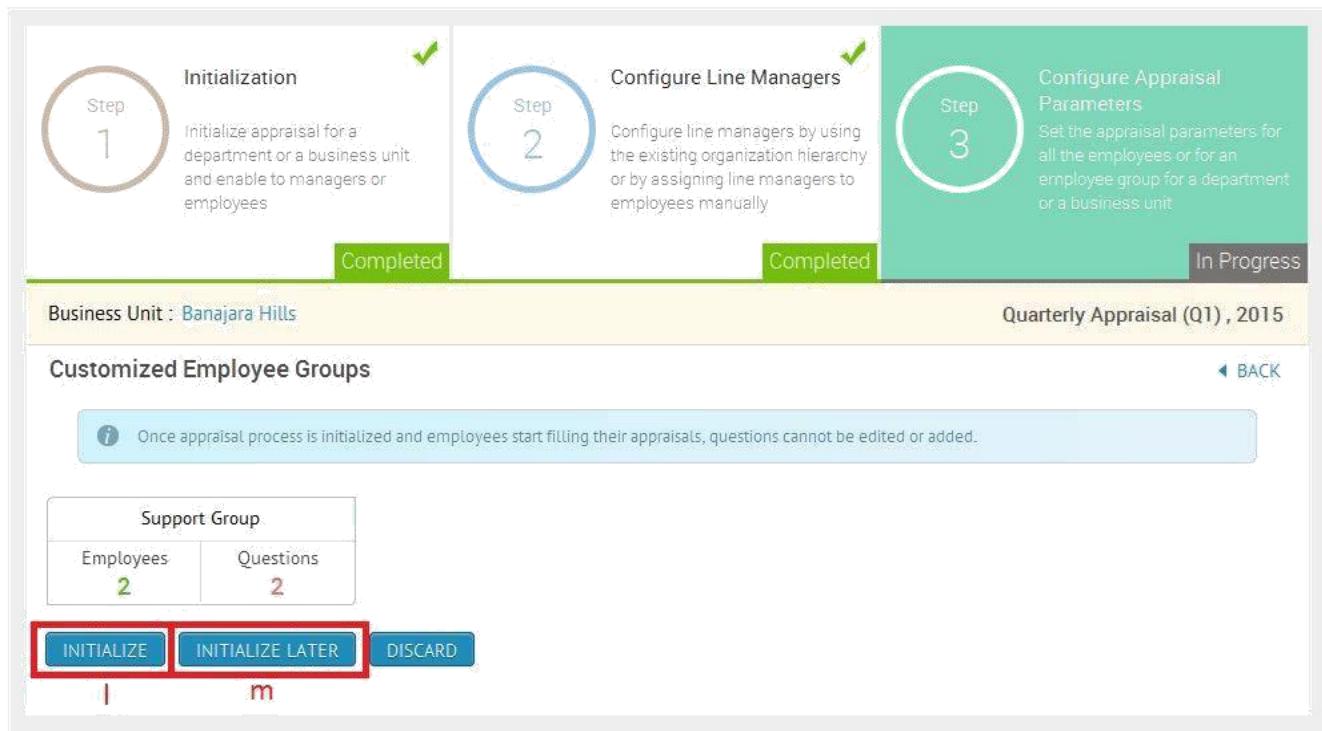


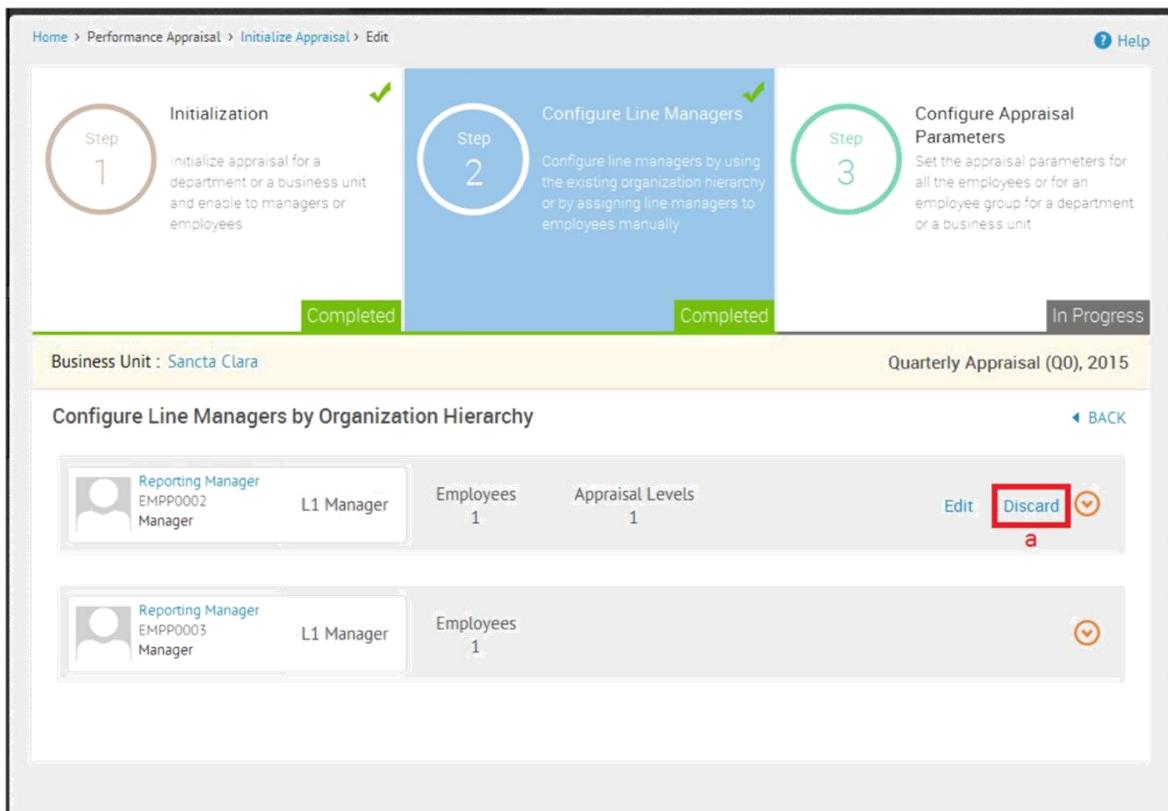
Figure 224

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

16.6 How do I undo/discard Line Manager Configuration?

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

Please refer Figure 224



OR

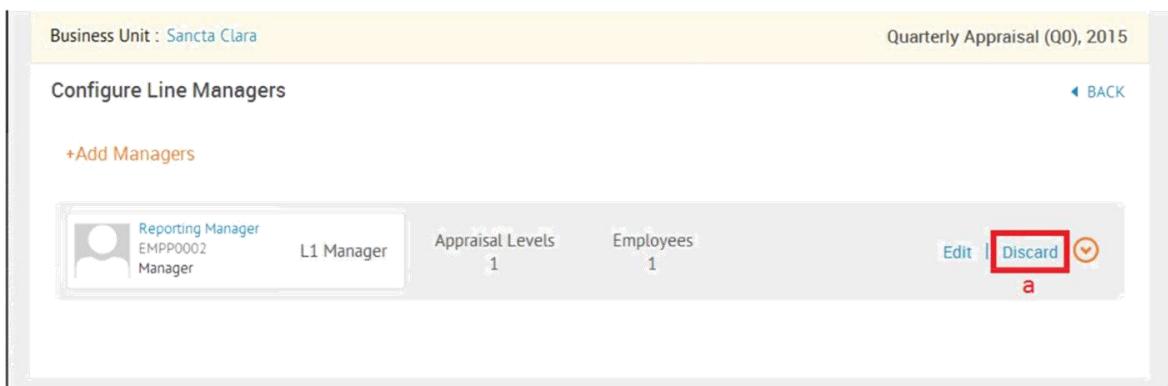


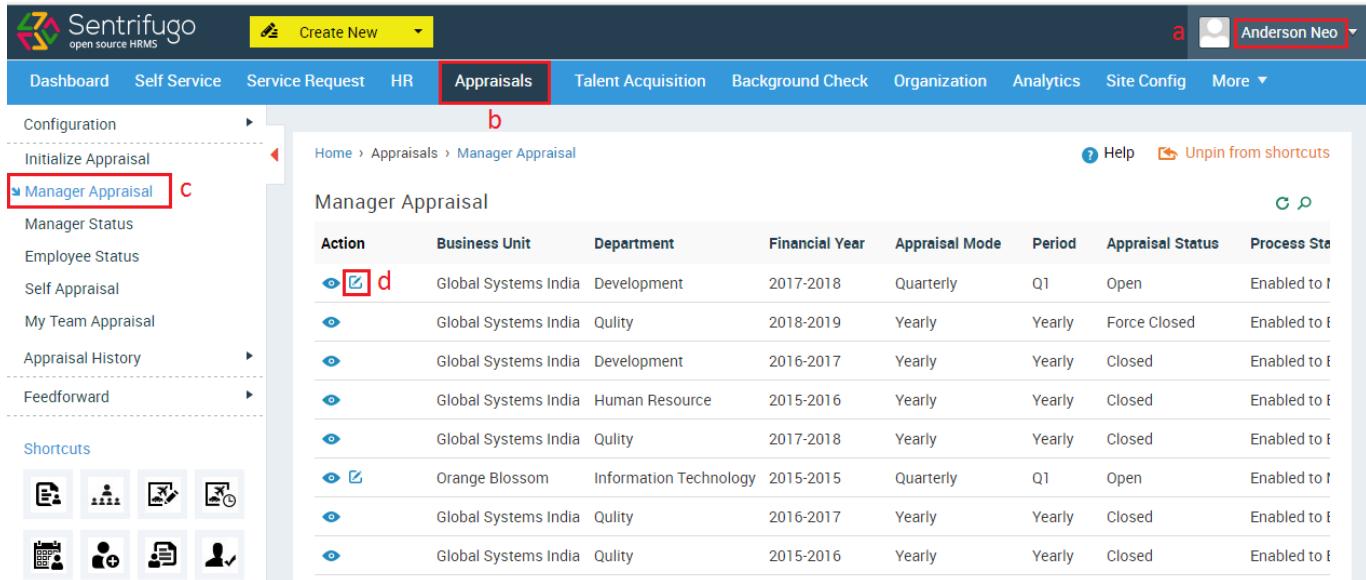
Figure 224

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

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

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

Please refer Figure 225



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

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

Figure 225

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

Please refer Figure 226

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

Group Details

CREATE NEW GROUP
SUBMIT INITIALIZATION

Group Name *

e

Employees

🔍

Selected Employees (0)

🔍

 Employee 1
(EMPP0029)
Software Engineer

f

 Employee 8
(EMPP0029)
Software Engineer

Configure Appraisal Parameters for All Employees

All | Selected
+ Add New Question
g

Questions	Actions
<input checked="" type="checkbox"/> Check All i	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings k
<input checked="" type="checkbox"/> h	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings j
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings

SAVE
Close

Figure 226

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

Or

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

Or

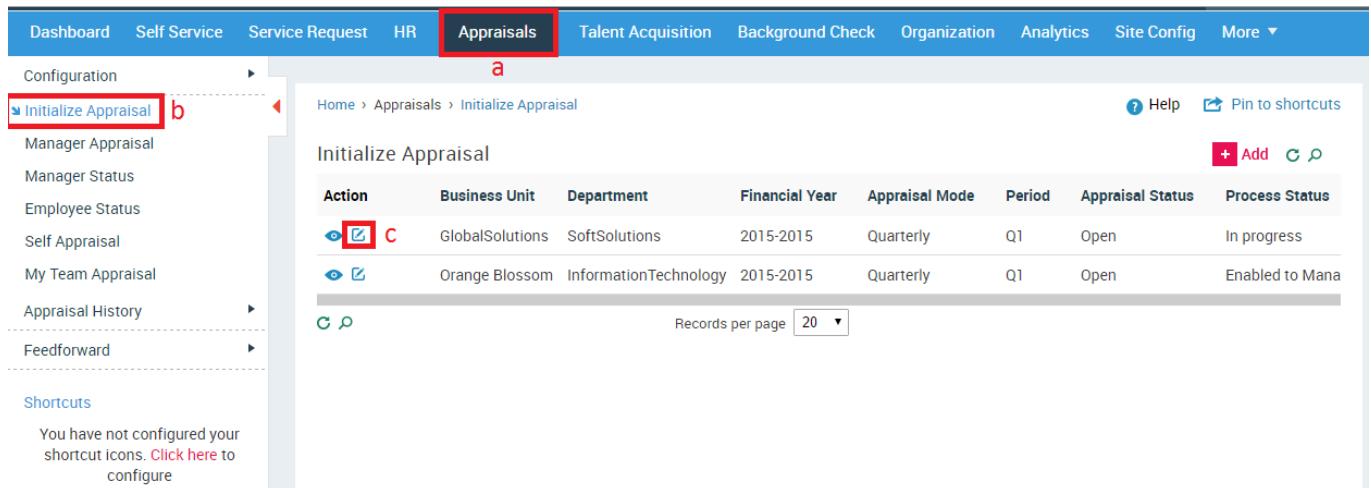
- k. Select Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
- l. Click **SAVE** button

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

16.8 How do I enable the appraisal to Employees?

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

Please refer Figure 227

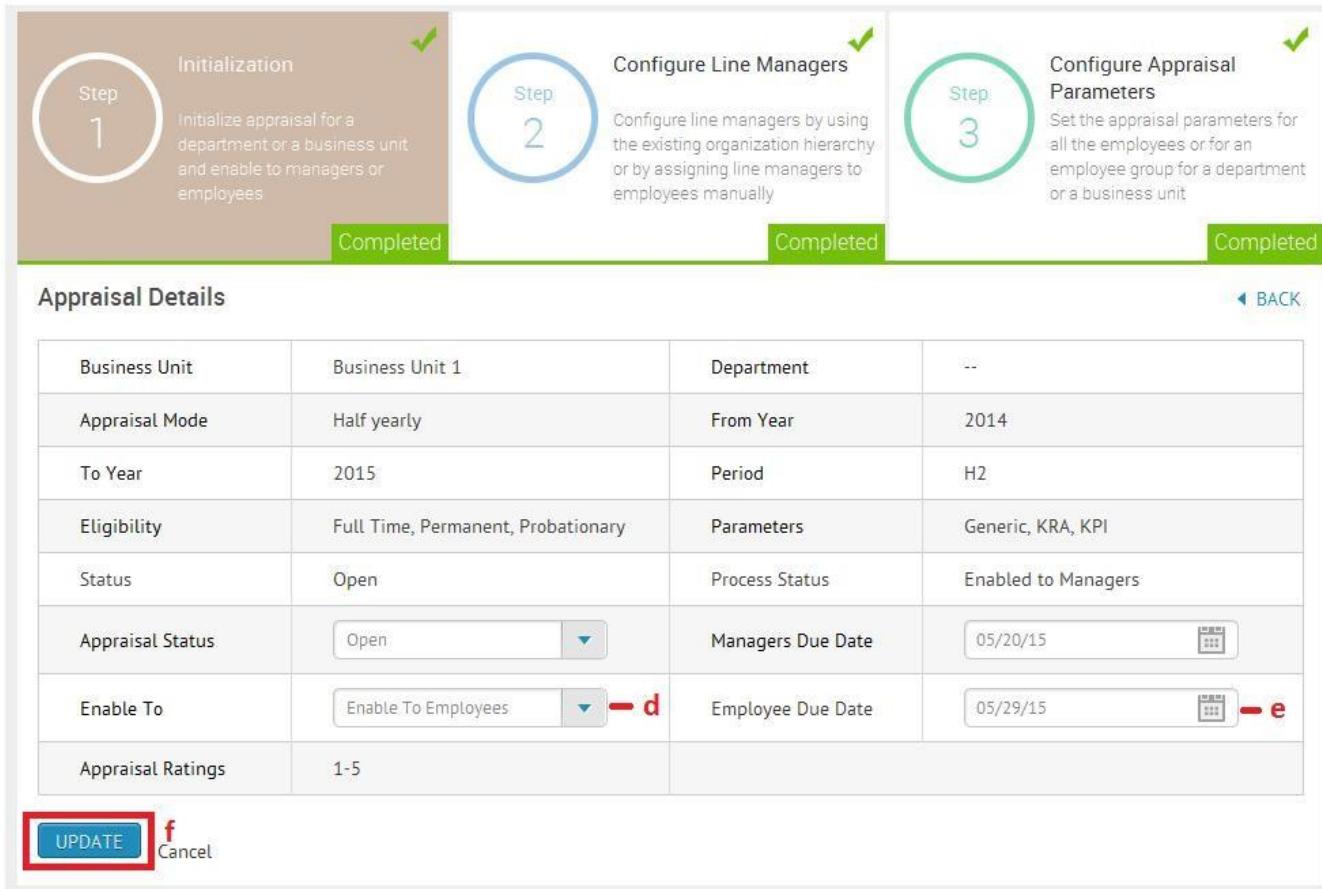


Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
<input checked="" type="checkbox"/> C	GlobalSolutions	SoftSolutions	2015-2015	Quarterly	Q1	Open	In progress
<input checked="" type="checkbox"/>	Orange Blossom	InformationTechnology	2015-2015	Quarterly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

Figure 227

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

Please refer Figure 228



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

◀ BACK

UPDATE **f** Cancel

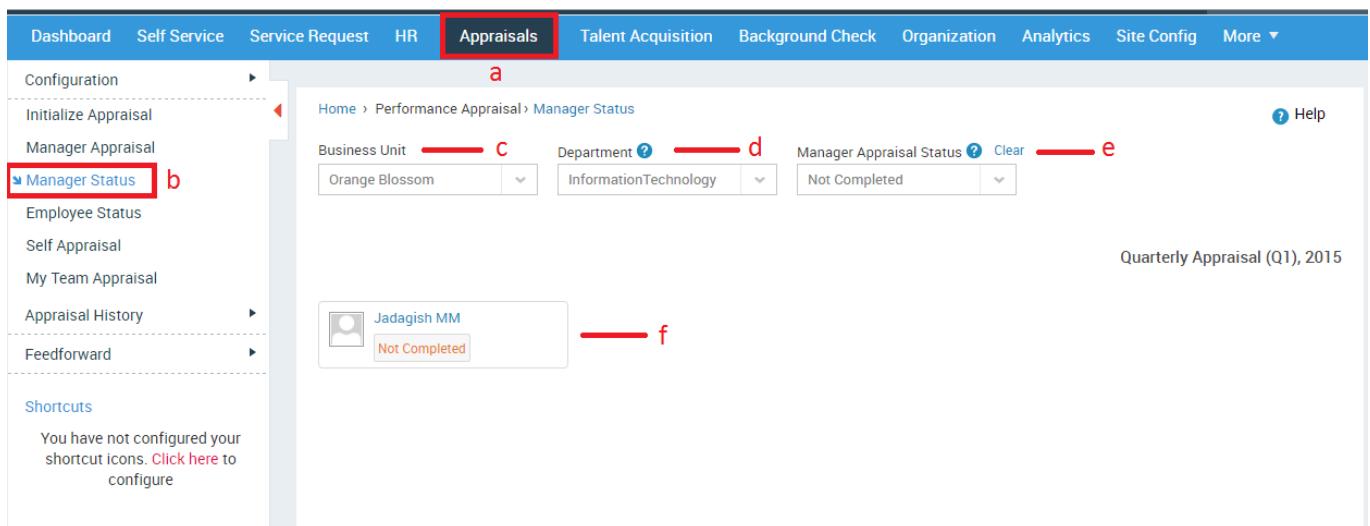
Figure 229

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

16.9 How do I view a Manager's Status?

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

Please refer Figure 230



The screenshot shows the Sentrifugo HRMS application interface. The top navigation bar has tabs for Dashboard, Self Service, Service Request, HR, Appraisals (which is highlighted with a red box), Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. The left sidebar has sections for Configuration, Initialize Appraisal, Manager Appraisal, Manager Status (highlighted with a red box and labeled 'b'), Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, Feedforward, and Shortcuts. The main content area shows a breadcrumb path: Home > Performance Appraisal > Manager Status. It includes filters for Business Unit (Orange Blossom, labeled 'c'), Department (InformationTechnology, labeled 'd'), and Manager Appraisal Status (Not Completed, labeled 'e'). A message at the bottom says 'Quarterly Appraisal (Q1), 2015'. Below the filters, a list displays a single item: 'Jadagish MM' with the status 'Not Completed' (labeled 'f'). A red annotation 'a' points to the 'Appraisals' tab in the top menu.

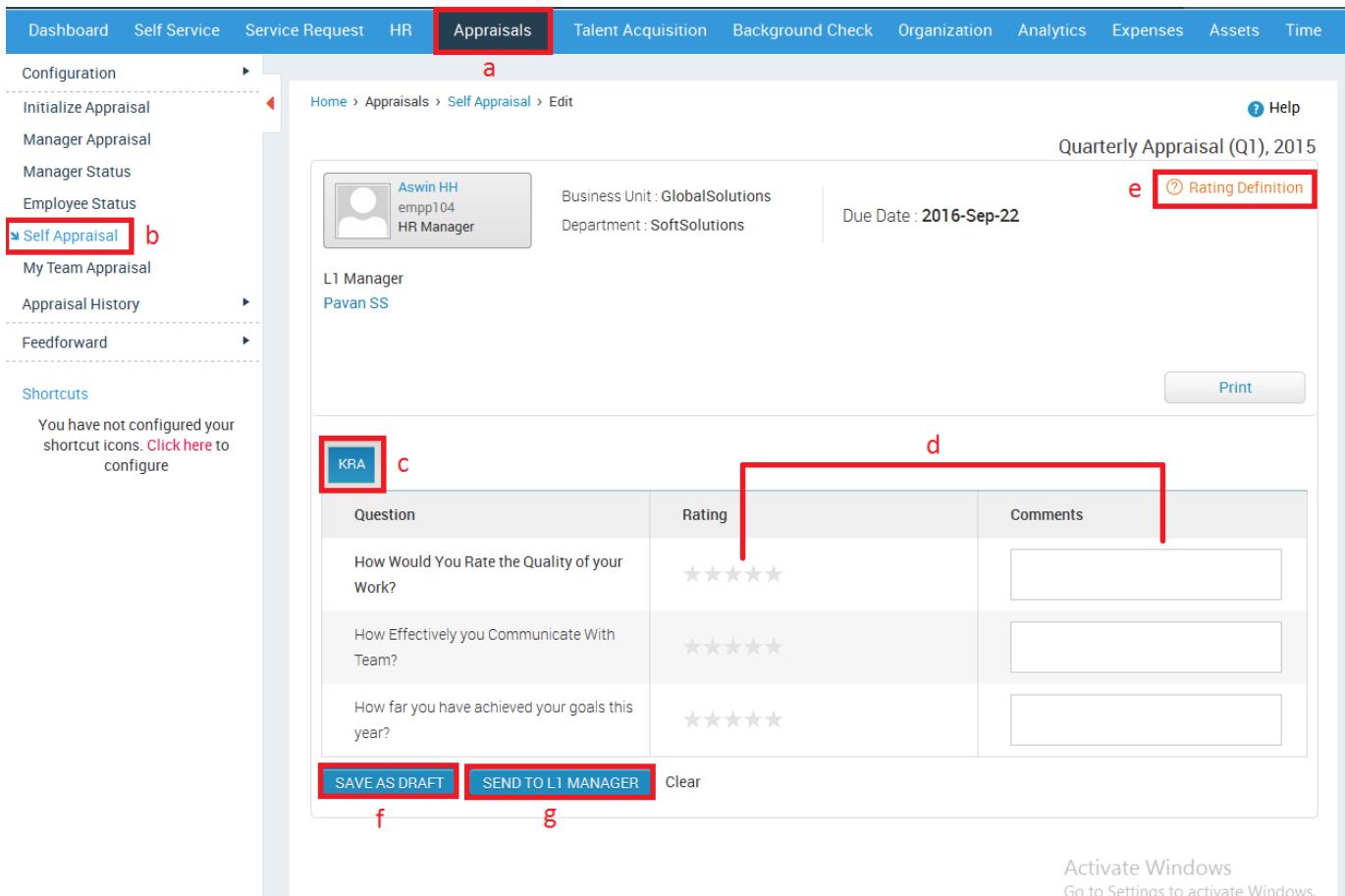
Figure 230

- Click **Appraisals** in the top menu
- Click **Manager Status** on the left menu panel
- Select the Business Unit
- Select the Department
- Select the Manager Appraisal Status if required
- Managers and their status will be displayed

16.10 How do I provide Self Appraisal?

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

Please refer Figure 231



Dashboard Self Service Service Request HR **Appraisals** Talent Acquisition Background Check Organization Analytics Expenses Assets Time

Configuration **a**

Initialize Appraisal

Manager Appraisal

Manager Status

Employee Status

Self Appraisal **b**

My Team Appraisal

Appraisal History

Feedforward

Shortcuts

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

Aswin HH
emp104
HR Manager

Business Unit: GlobalSolutions
Department: SoftSolutions

Due Date: 2016-Sep-22

Print

L1 Manager
Pavan SS

KRA **c**

Question	Rating	Comments
How Would You Rate the Quality of your Work?	★★★★★	
How Effectively you Communicate With Team?	★★★★★	
How far you have achieved your goals this year?	★★★★★	

SAVE AS DRAFT **f** **SEND TO L1 MANAGER** **g** Clear

Activate Windows
Go to Settings to activate Windows.

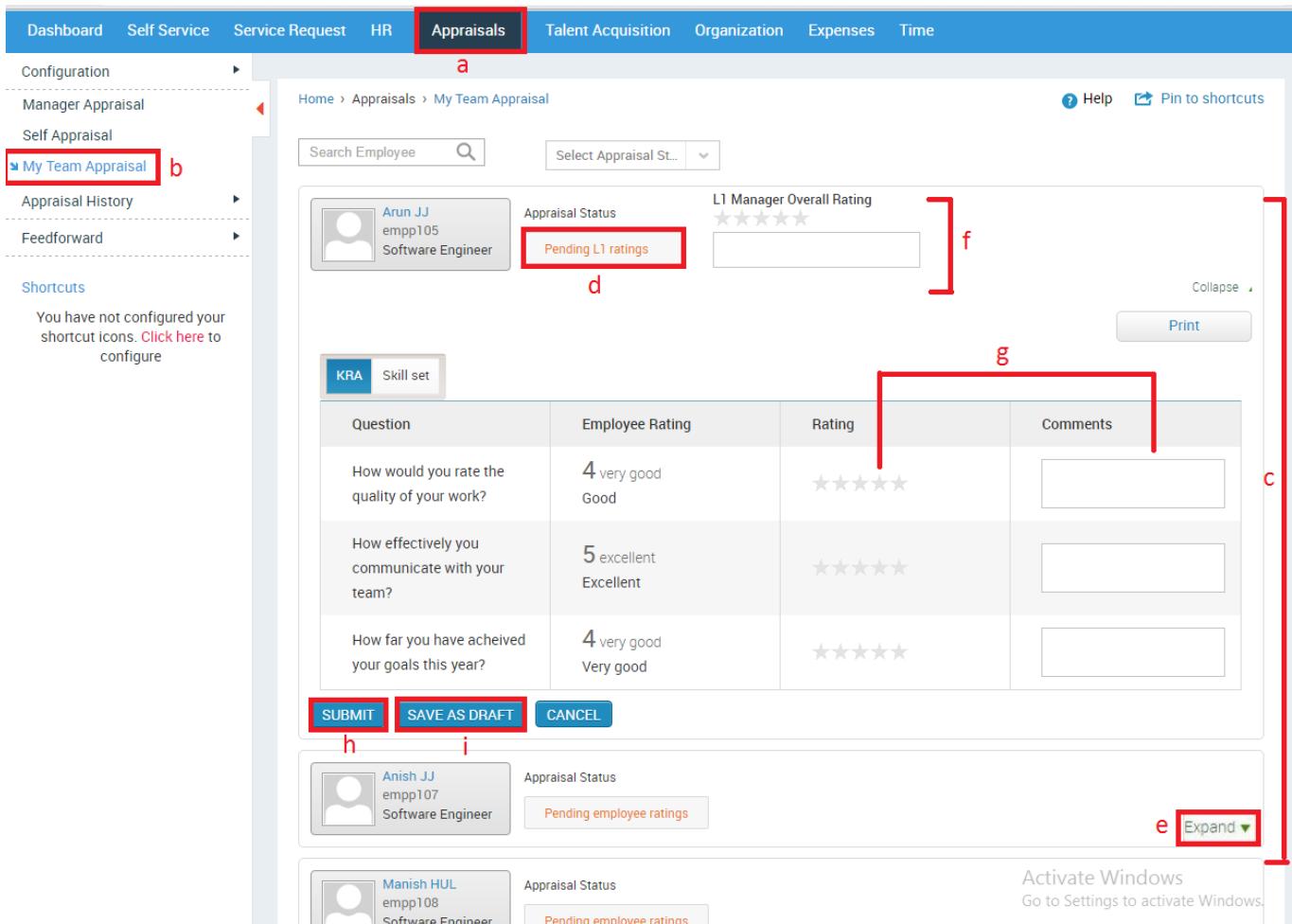
Figure 231

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

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

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

Please refer Figure 232



The screenshot shows the Sentrifugo Appraisals module. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (highlighted in red), Talent Acquisition, Organization, Expenses, and Time. The left sidebar has sections for Configuration, Manager Appraisal, Self Appraisal, and My Team Appraisal (highlighted in red, labeled 'b'). Below these are Appraisal History and Feedforward. A 'Shortcuts' section indicates no configuration has been done, with a link to do so. The main content area shows a search bar, a 'Select Appraisal St...' dropdown, and a list of employees with their details (e.g., Arun JJ, empp105, Software Engineer). An 'Appraisal Status' section shows 'Pending L1 ratings' (highlighted in red, labeled 'd'). An 'L1 Manager Overall Rating' section shows five stars (highlighted in red, labeled 'f'). A table below shows KRA and Skill set questions with employee ratings (e.g., 4 very good, Good) and overall ratings (e.g., 5 excellent, Excellent). Buttons for SUBMIT (highlighted in red, labeled 'h'), SAVE AS DRAFT (highlighted in red, labeled 'i'), and CANCEL are at the bottom. At the bottom of the page, there are sections for Anish JJ and Manish HUL, both showing 'Pending employee ratings'. A red bracket labeled 'c' covers the right side of the page. A red bracket labeled 'g' covers the table area. A red bracket labeled 'e' covers the 'Expand' button.

Figure 232

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

16.12 How do I check Employee Status?

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

Please refer Figure 30

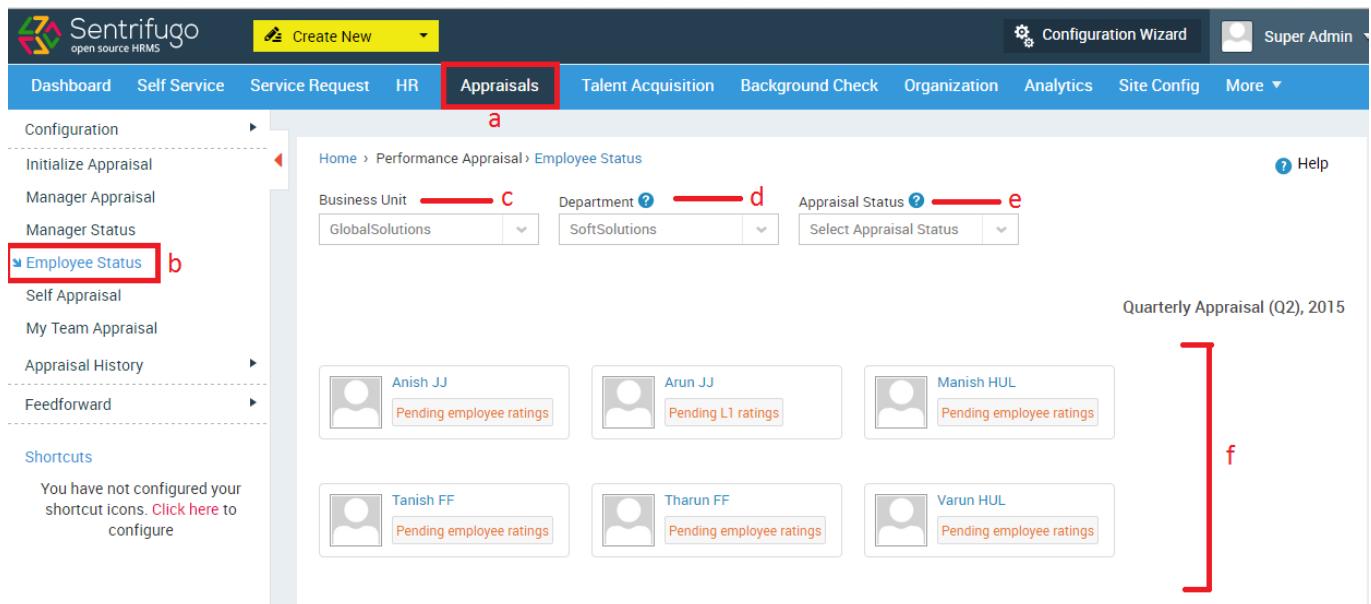


Figure 233

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

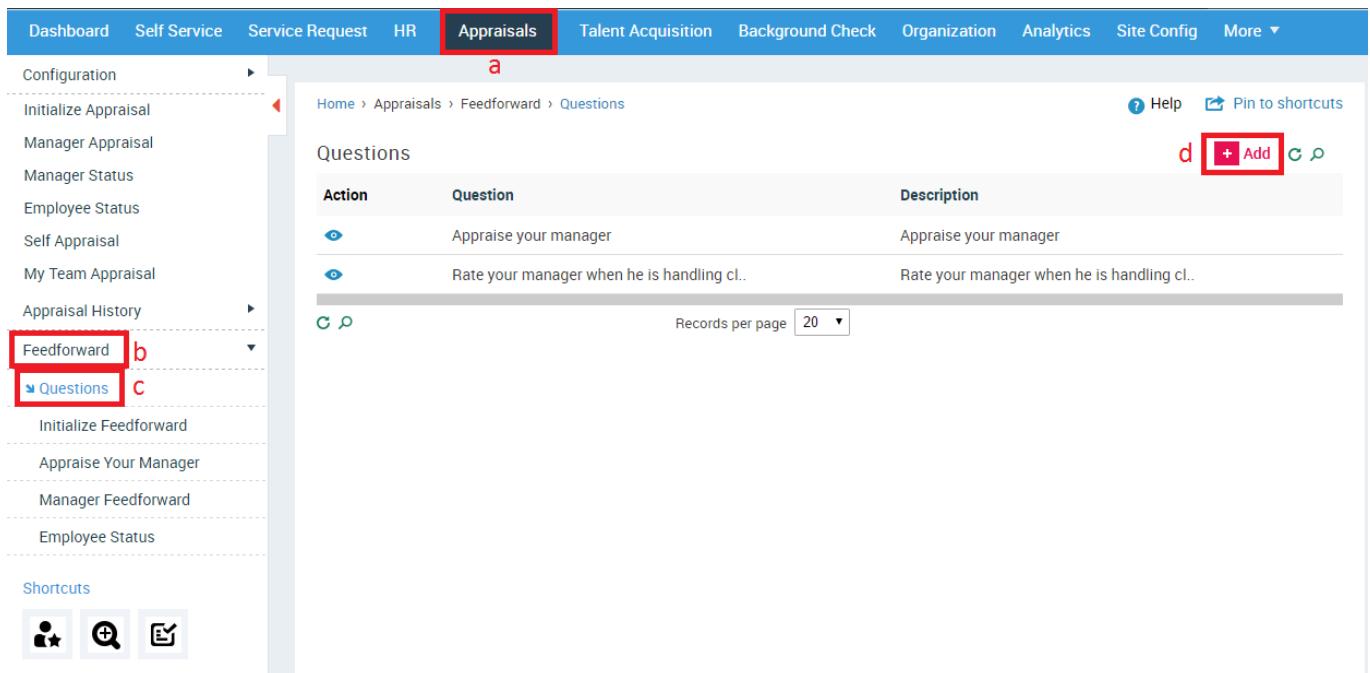
16.13 What is Feedforward?

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

16.14 How do I add Questions for Feedforward?

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

Please refer Figure 234

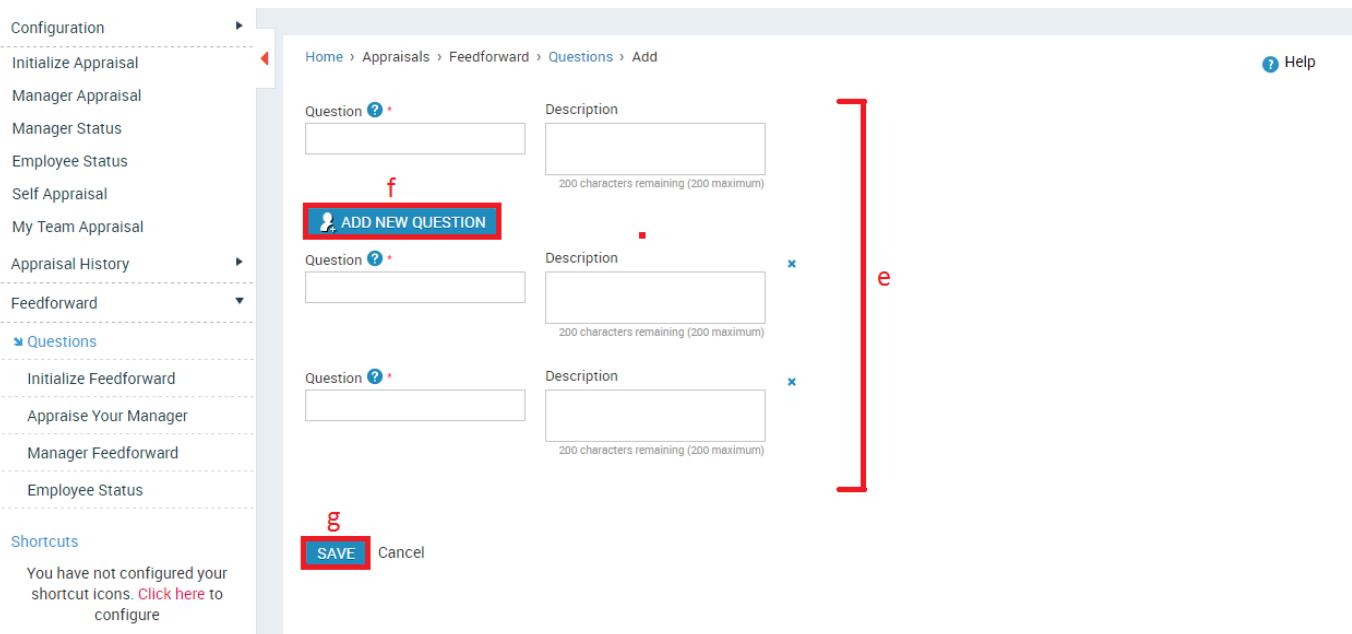


Action	Question	Description
Eye icon	Appraise your manager	Appraise your manager
Eye icon	Rate your manager when he is handling cl...	Rate your manager when he is handling cl...

Figure 234

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

Please refer Figure 235



The screenshot shows the 'Questions > Add' page in the Sentrifugo application. On the left, there's a navigation sidebar with various configuration options like 'Initialize Appraisal', 'Manager Appraisal', etc. The 'Questions' section is expanded, showing 'Initialize Feedforward', 'Appraise Your Manager', 'Manager Feedforward', and 'Employee Status'. Below that is a 'Shortcuts' section with a note about未配置 shortcut icons. The main area has three rows for adding questions. Each row has a 'Question' input field with a question mark icon and a required asterisk, followed by a 'Description' input field with a character count limit of 200. An 'ADD NEW QUESTION' button is at the top of the list, and a 'SAVE' button is at the bottom. Red annotations are present: 'f' points to the 'ADD NEW QUESTION' button, 'e' groups the second and third rows of question inputs, and 'g' groups the 'Question' and 'Description' labels for the first row.

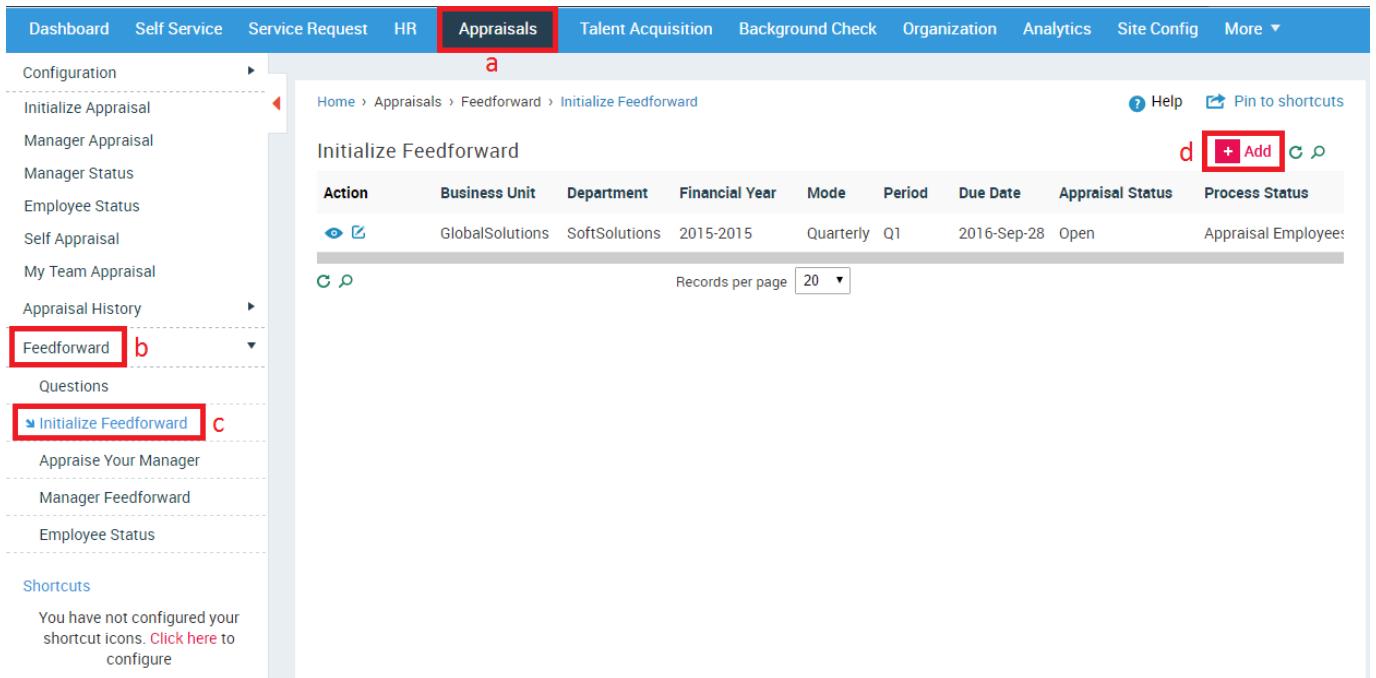
Figure 236

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

16.15 How do I initialize Feedforward?

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

Please refer Figure 237

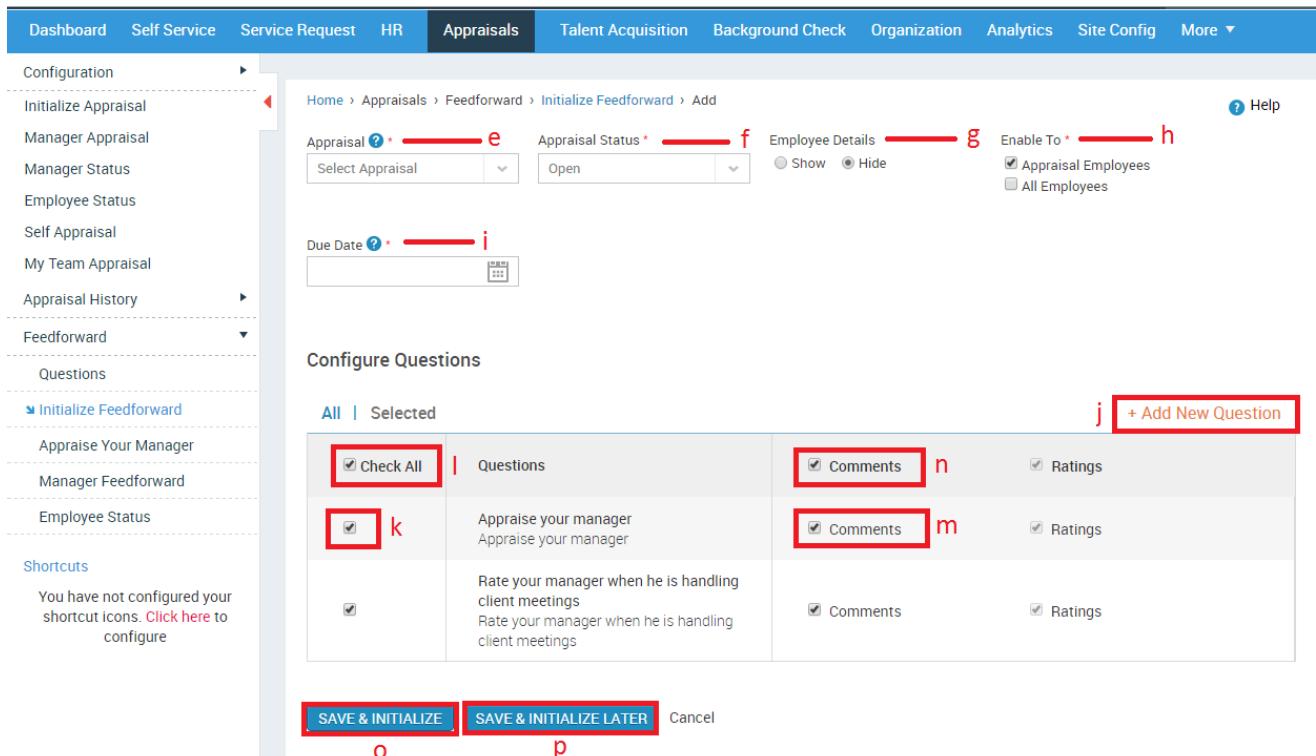


The screenshot shows the Sentrifugo interface with the 'Appraisals' tab selected in the top navigation bar. A red box labeled 'a' highlights the 'Appraisals' tab. On the left, a sidebar menu has a red box labeled 'b' around the 'Feedforward' option under the 'Questions' section. Another red box labeled 'c' highlights the 'Initialize Feedforward' link under the 'Feedforward' section. At the top right, there is a red box labeled 'd' around the '+ Add' button.

Figure 237

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

Please refer Figure 238



This screenshot shows the 'Initialize Feedforward' configuration page. The top navigation bar has a red box labeled 'e' around the 'Appraisals' tab. The left sidebar has a red box labeled 'f' around the 'Initialize Feedforward' link under the 'Feedforward' section. The main form area has several fields highlighted with red boxes: 'Appraisal' (labeled 'g'), 'Appraisal Status' (labeled 'h'), 'Employee Details' (labeled 'i'), 'Due Date' (labeled 'j'), and a table for 'Configure Questions' (labeled 'k'). The 'Configure Questions' table has three rows. The first row has a red box around the 'Check All' checkbox. The second row has a red box around the question 'Appraise your manager' and its checkbox. The third row has a red box around the question 'Rate your manager when he is handling client meetings' and its checkbox. The table also includes columns for 'Comments' (labeled 'l') and 'Ratings' (labeled 'm'). At the bottom, there are three buttons: 'SAVE & INITIALIZE' (labeled 'n'), 'SAVE & INITIALIZE LATER' (labeled 'o'), and 'Cancel' (labeled 'p').

Figure 238

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

Or

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

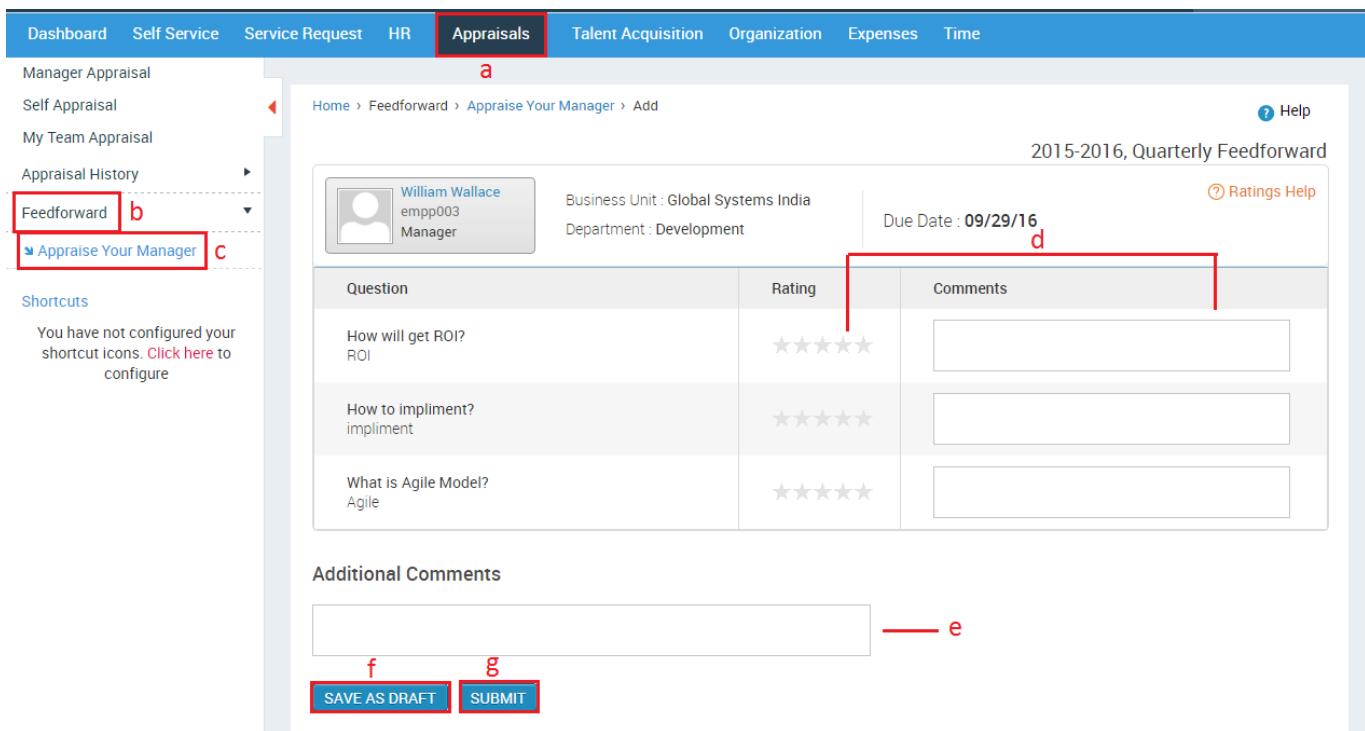
Or

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

16.16 How do I Appraise my Manager?

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

Please refer Figure 239



Dashboard Self Service Service Request HR **Appraisals** Talent Acquisition Organization Expenses Time

Manager Appraisal
Self Appraisal
My Team Appraisal
Appraisal History
Feedforward **b**
Appraise Your Manager **c**

Home > Feedforward > Appraise Your Manager > Add

Help

2015-2016, Quarterly Feedforward

William Wallace
emp003
Manager

Business Unit: Global Systems India
Department: Development

Due Date: 09/29/16

Ratings Help

Question	Rating	Comments
How will get ROI? ROI	★★★★★	
How to impliment? impliment	★★★★★	
What is Agile Model? Agile	★★★★★	

Additional Comments

f **g**

SAVE AS DRAFT **SUBMIT**

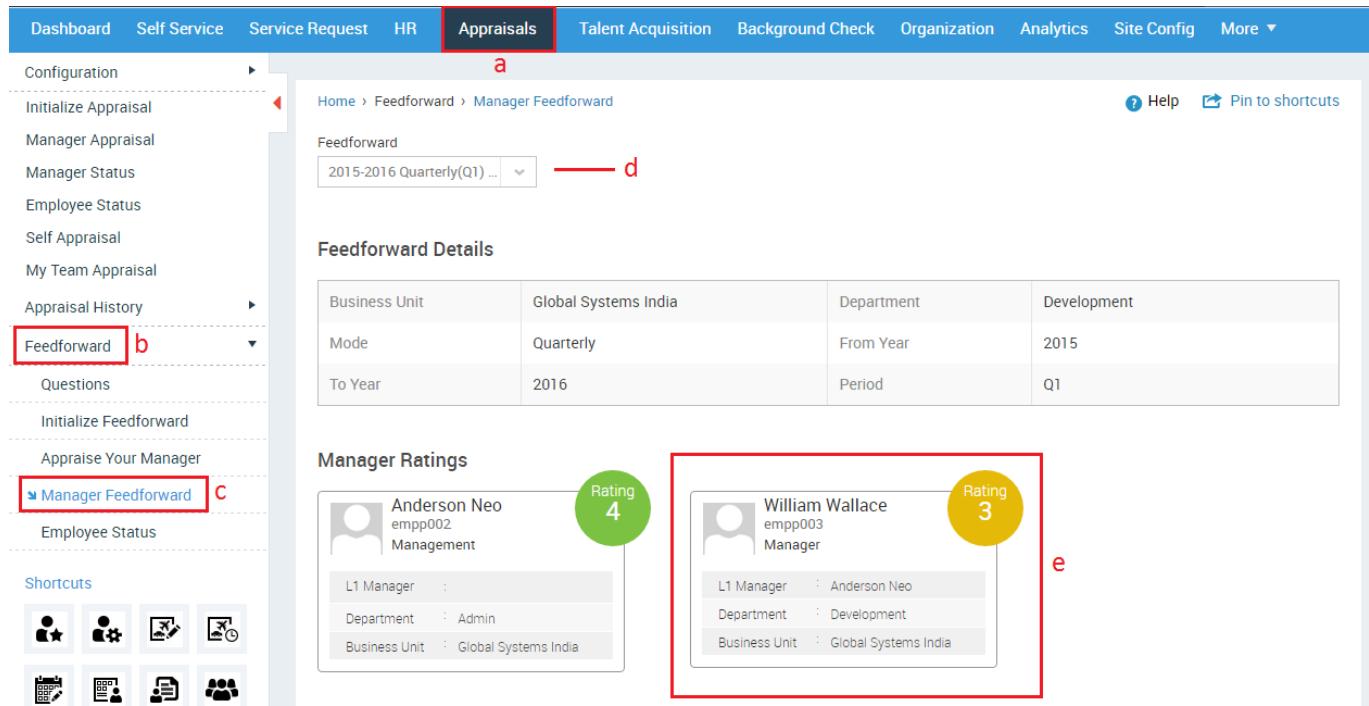
Figure 240

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

16.17 How do I view Managers' Feedforward details?

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

Please refer Figure 241



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (which is highlighted with a red box), Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. A left-hand sidebar contains sections for Configuration, Initialize Appraisal, Manager Appraisal, Manager Status, Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, Feedforward (highlighted with a red box), Questions, Initialize Feedforward, Appraise Your Manager, Manager Feedforward (highlighted with a red box and labeled 'c'), and Employee Status. Below the sidebar is a 'Shortcuts' section with several icons. The main content area displays 'Feedforward Details' for the '2015-2016 Quarterly(Q1)' process. It includes a table with four rows: Business Unit (Global Systems India), Department (Development), Mode (Quarterly), From Year (2015); Mode (Quarterly), From Year (2015), To Year (2016), Period (Q1). The 'Manager Ratings' section is highlighted with a red box and labeled 'e'. It lists two managers: Anderson Neo (Rating 4) and William Wallace (Rating 3). Each manager has a profile picture, name, employee ID, and title, followed by their L1 Manager, Department, and Business Unit.

Business Unit	Global Systems India	Department	Development
Mode	Quarterly	From Year	2015
To Year	2016	Period	Q1

Manager Ratings	
 Anderson Neo empp002 Management	Rating 4
 William Wallace empp003 Manager	Rating 3
L1 Manager : Anderson Neo	
Department : Admin	
Business Unit : Global Systems India	

Figure 241

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

Please refer Figure 242

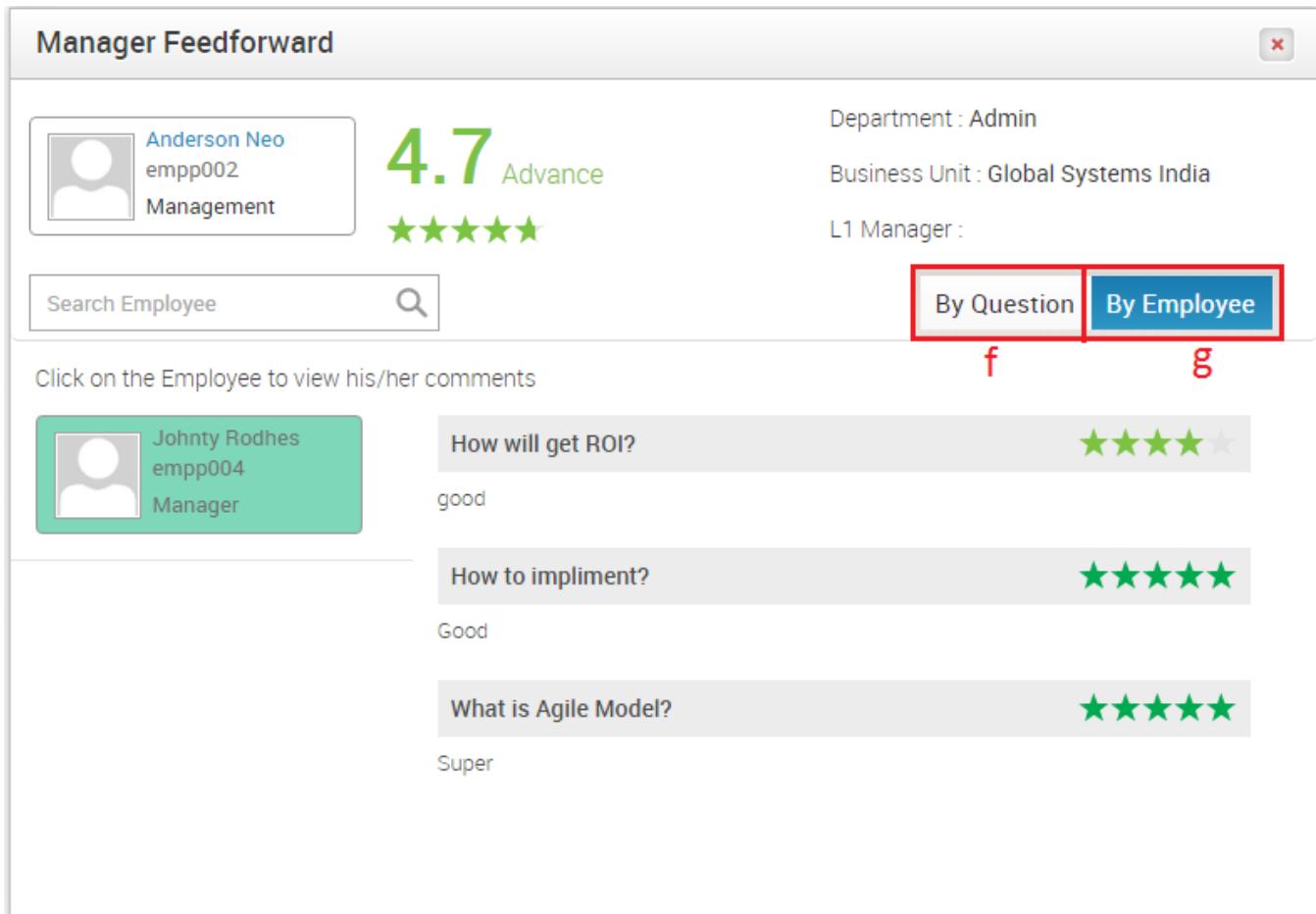


Figure 243

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

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

16.18 How do I view Employee Feedforward Status?

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

Please refer Figure 244

Figure 244

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

16.19 How do I view my Appraisal History?

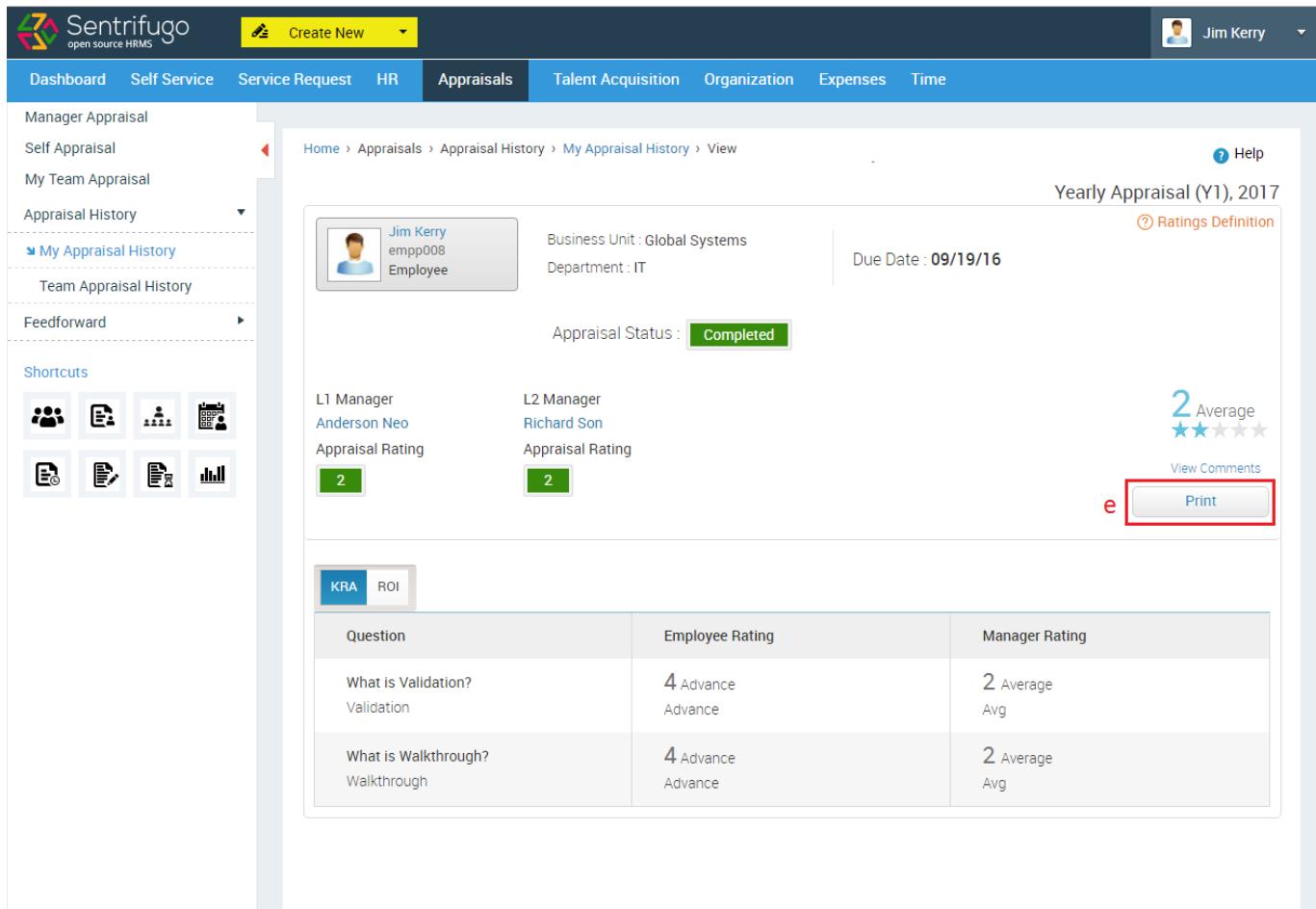
Please refer Figure 245

Action	Business Unit	Department	Financial Year	Appraisal Mode	Period
	Global Systems	IT	2016-2017	Yearly	Yearly

Figure 245

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

Please refer Figure 246



The screenshot shows the Sentrifugo HRMS application interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (which is the active tab), Talent Acquisition, Organization, Expenses, and Time. A user profile for Jim Kerry is visible on the right.

The main content area displays Jim Kerry's appraisal details for the "Yearly Appraisal (Y1), 2017". Key information shown includes:

- Employee:** Jim Kerry (emp008), Employee
- Business Unit:** Global Systems
- Department:** IT
- Due Date:** 09/19/16
- Appraisal Status:** Completed
- L1 Manager:** Anderson Neo
- L2 Manager:** Richard Son
- Average Rating:** 2 (2 stars)

A red box highlights the **Print** button in the bottom right corner of the appraisal summary section.

Below the summary, there is a table comparing KRA (Key Result Areas) and ROI (Return on Investment) questions across employee and manager ratings.

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

Figure 246

You can view your closed appraisal details here.

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

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

Please refer Figure 247

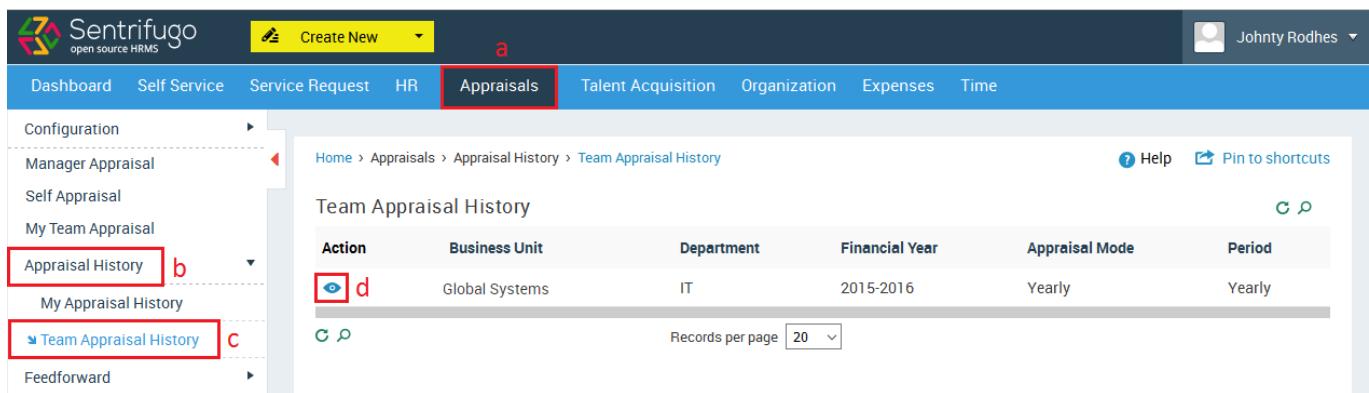


Figure 247

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

Please refer Figure 248

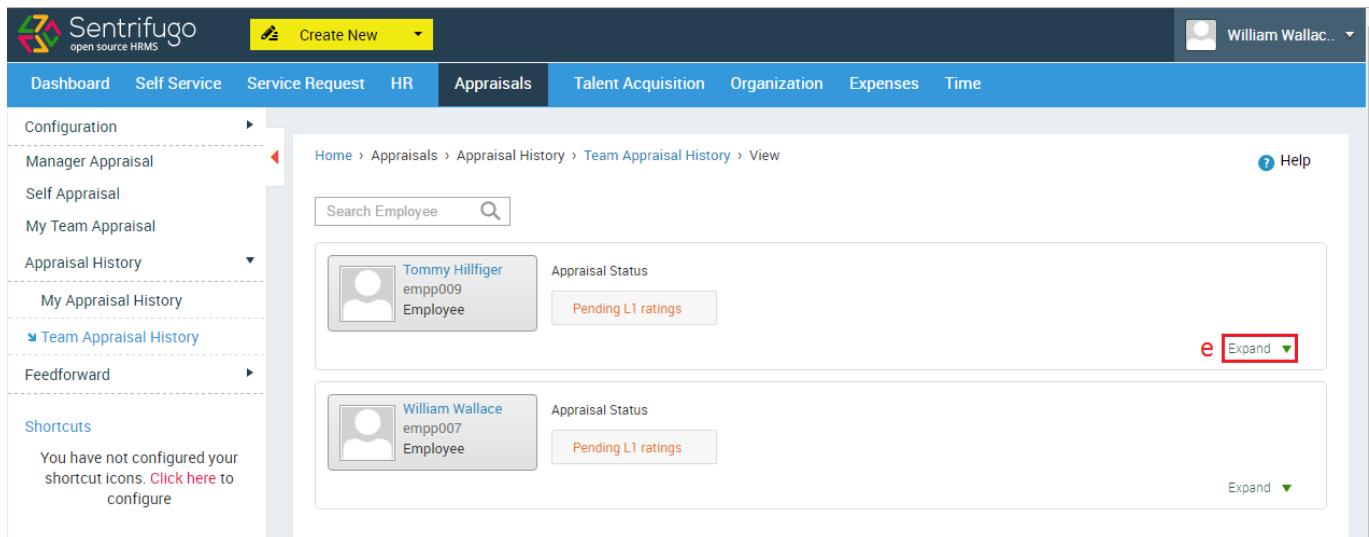
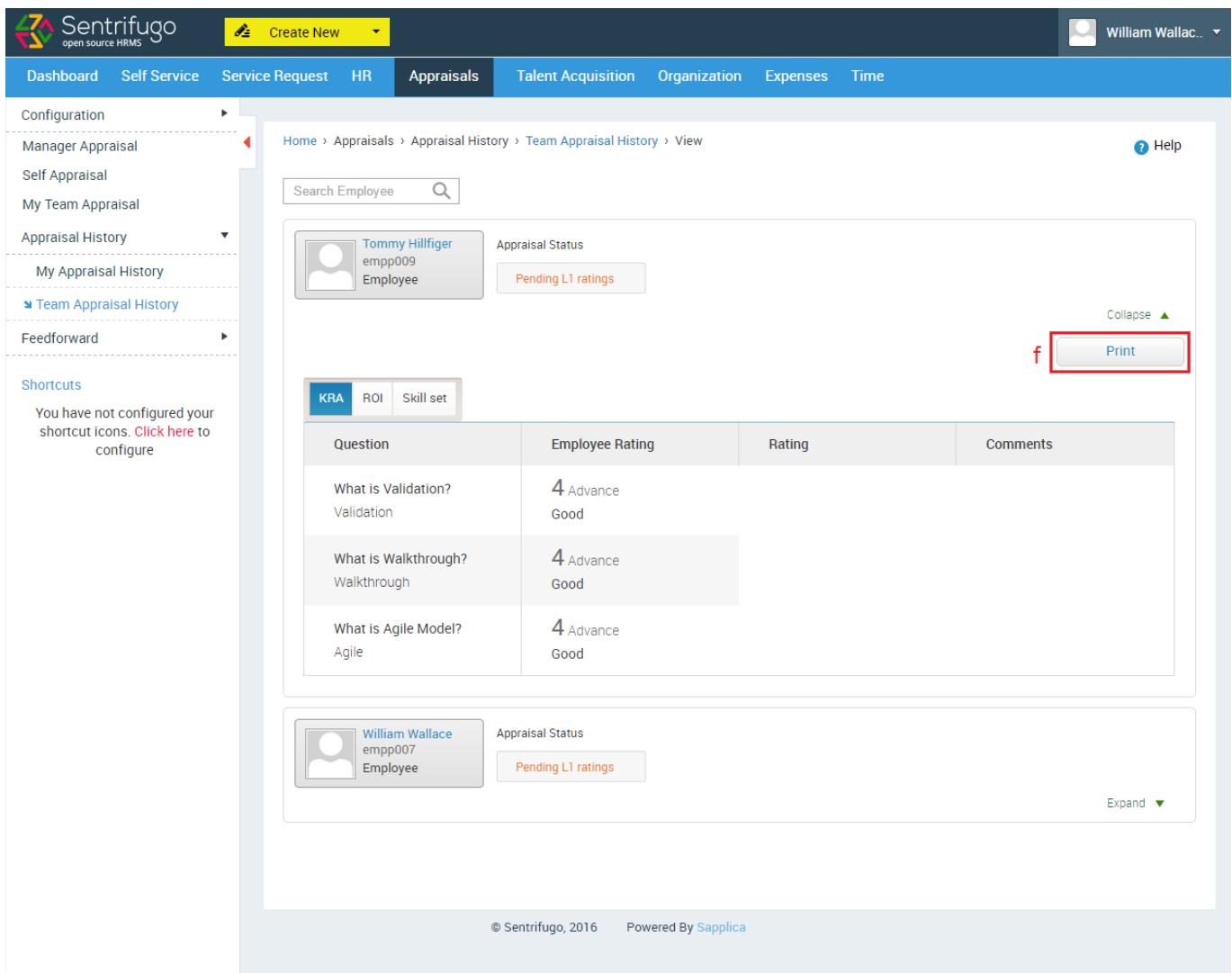


Figure 248

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

Please refer Figure 249



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

The left sidebar contains a navigation tree with sections like Configuration, Manager Appraisal, Self Appraisal, My Team Appraisal, Appraisal History (with sub-options My Appraisal History and Team Appraisal History selected), Feedforward, and Shortcuts (with a note about unconfigured shortcut icons).

The main content area displays a "Team Appraisal History" view for Tommy Hilfiger (emp009). It shows his appraisal status as "Pending L1 ratings". Below this is a table with columns: Question, Employee Rating, Rating, and Comments. The table contains three rows of data:

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

At the bottom of the page, there is another section for William Wallace (emp007) with a pending rating status. The footer includes copyright information: © Sentrifugo, 2016 and Powered By Sapplica.

Figure 249

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

17. Disciplinary Incident Management

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

17.1 How do I create a Violation Type?



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

Please refer Figure 250

The screenshot shows the Sentrifugo HRMS application interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. The 'More' dropdown is open, showing options like Expenses, Disciplinary (which is highlighted with a red box), Time, and Logs. The main content area shows a 'Violation Type' list with a single entry: 'Alcohol Abuse'. The left sidebar has a 'Violation Type' link (also highlighted with a red box) and other links for Raise An Incident, My Incidents, Team Incidents, All Incidents, and Shortcuts. Below the sidebar are four small icons: a magnifying glass, a calendar, a person, and a document.

Figure 250

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

Please refer Figure 251

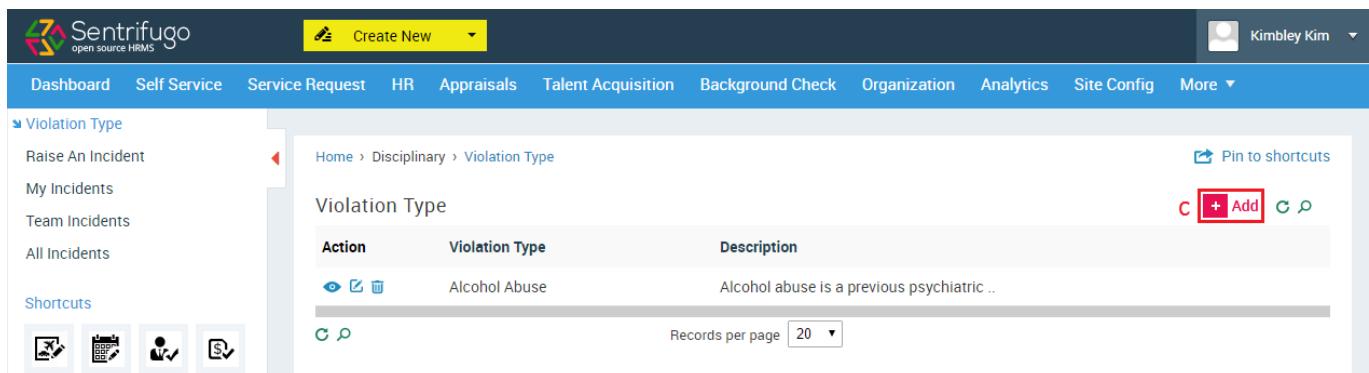


Figure 251

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

Please refer Figure 252

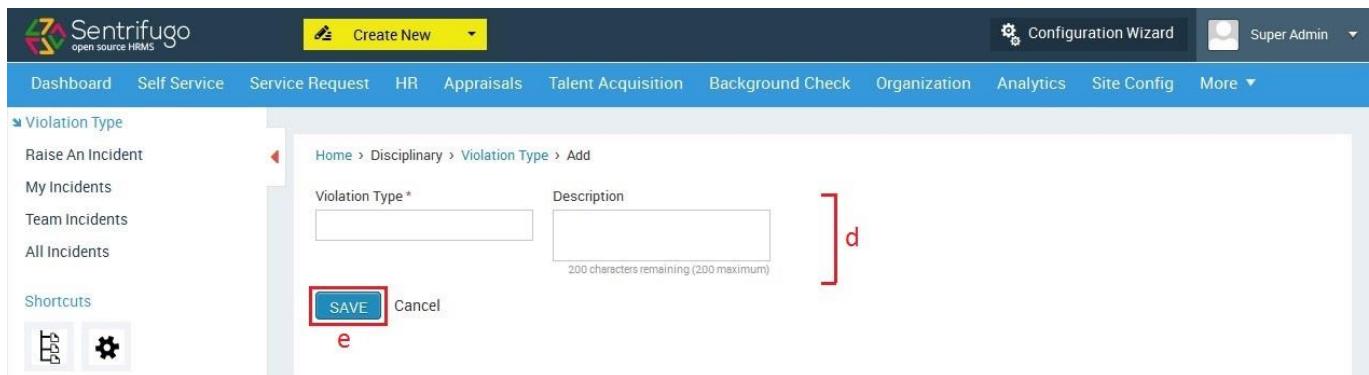
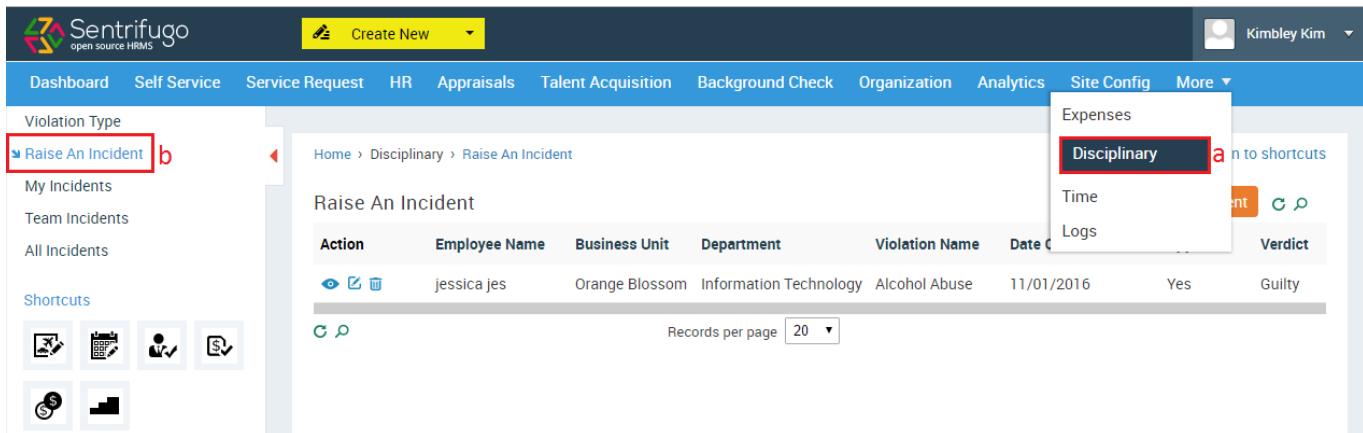


Figure 252

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

17.2 How do I raise a disciplinary incident?

Please refer Figure 253

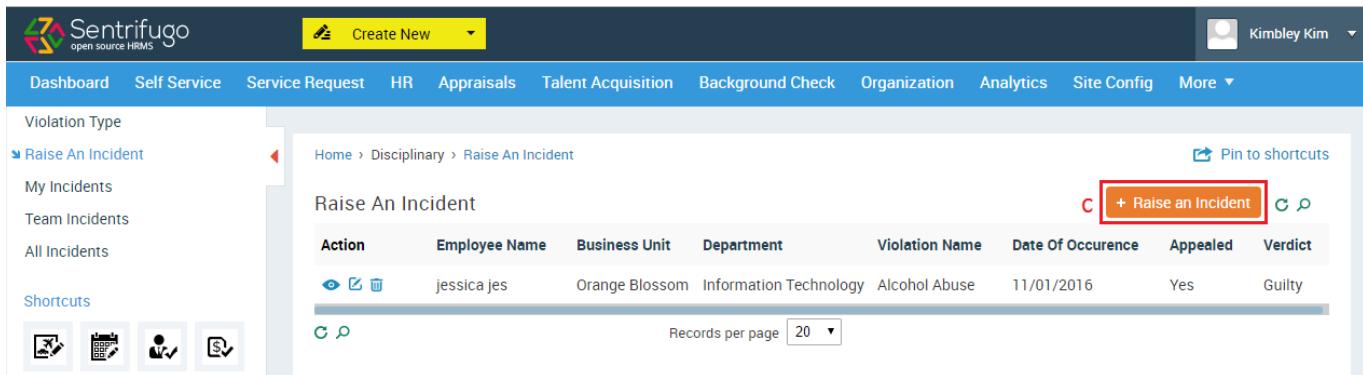


The screenshot shows the Sentrifugo web interface. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. On the far right, a user profile for 'Kimbley Kim' is shown. Below the navigation bar, a secondary menu is open under 'More', specifically the 'Disciplinary' section, which includes links for Expenses, Time, Logs, and Verdict. In the center, a grid titled 'Raise An Incident' displays a single row of data: Action (eye icon), Employee Name (jessica jes), Business Unit (Orange Blossom), Department (Information Technology), Violation Name (Alcohol Abuse), Date Of Occurrence (11/01/2016),Appealed (Yes), and Verdict (Guilty). The grid has a 'Records per page' dropdown set to 20.

Figure 253

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

Please refer Figure 254

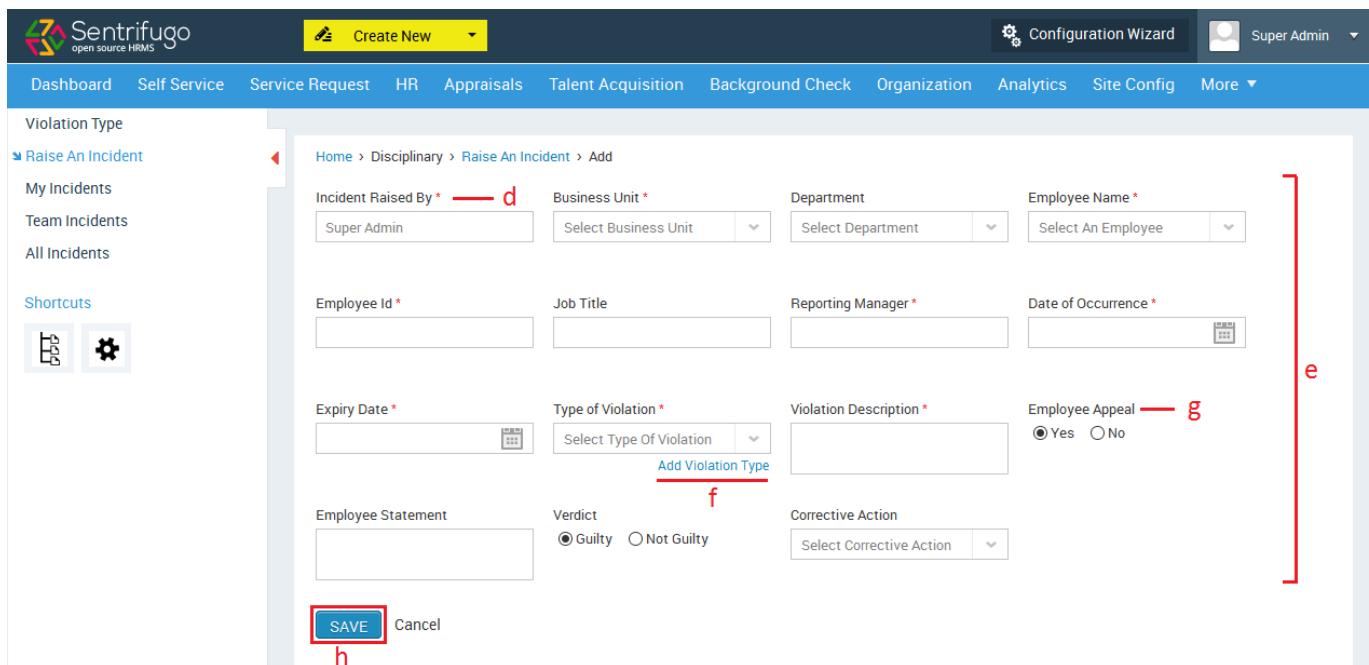


This screenshot is similar to Figure 253, showing the 'Raise An Incident' screen. The grid header now includes a prominent orange button with a plus sign and the text '+ Raise an Incident'. Other visible columns in the grid include Action, Employee Name, Business Unit, Department, Violation Name, Date Of Occurrence,Appealed, and Verdict. The rest of the interface, including the sidebar and top navigation, is identical to Figure 253.

Figure 254

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

Please refer Figure 255



Violation Type

Raise An Incident

My Incidents

Team Incidents

All Incidents

Shortcuts

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

Home > Disciplinary > Raise An Incident > Add

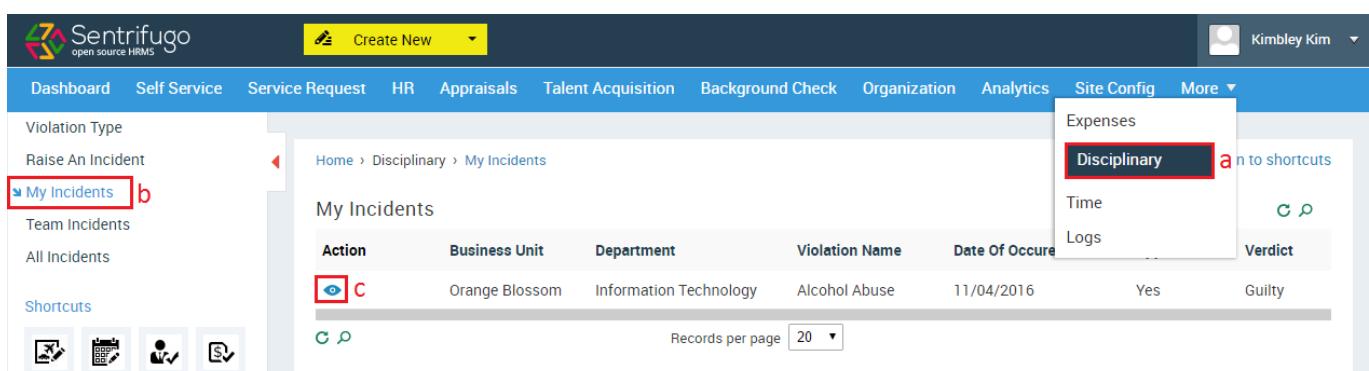
Incident Raised By * d	Business Unit *	Department	Employee Name *
Super Admin	Select Business Unit	Select Department	Select An Employee
Employee Id *	Job Title	Reporting Manager *	Date of Occurrence *
			<input type="button" value="Calendar"/>
Expiry Date *	Type of Violation *	Violation Description *	Employee Appeal g
	Select Type Of Violation		<input checked="" type="radio"/> Yes <input type="radio"/> No
Add Violation Type f			
Employee Statement	Verdict	Corrective Action	
	<input checked="" type="radio"/> Guilty <input type="radio"/> Not Guilty	Select Corrective Action	<input type="button" value="Select"/>
<input type="button" value="SAVE"/> h Cancel			

Figure 255

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

17.3 How do I view my disciplinary incidents?

Please refer Figure 256



Violations

Raise An Incident

My Incidents **b**

Team Incidents

All Incidents

Shortcuts

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

Home > Disciplinary > My Incidents

My Incidents

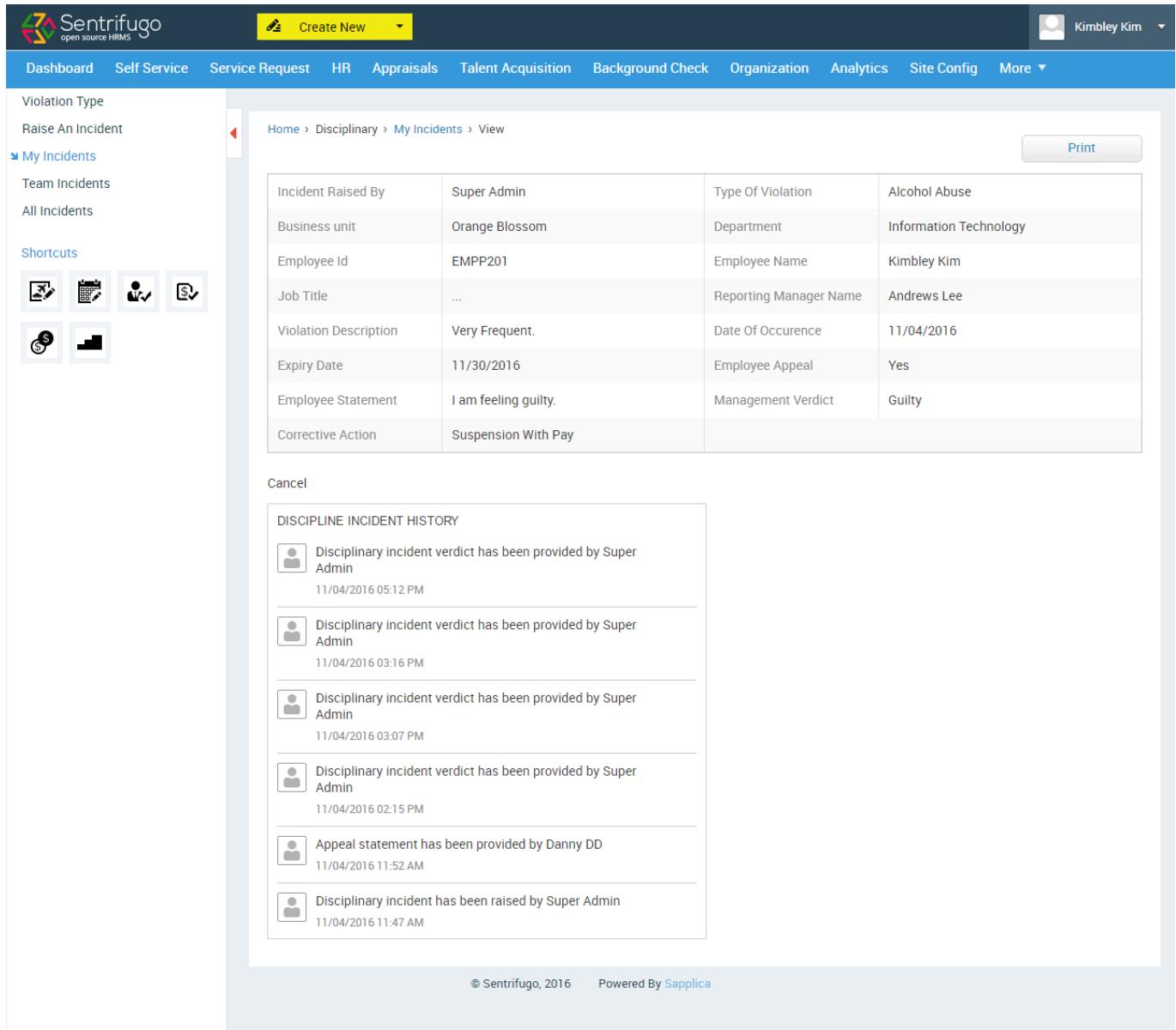
Action c	Business Unit	Department	Violation Name	Date Of Occure	Employee Appeal	Verdict
<input type="button" value="View"/>	Orange Blossom	Information Technology	Alcohol Abuse	11/04/2016	Yes	Guilty

Records per page 20 ▾

Figure 256

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

Please refer Figure 257



The screenshot shows the Sentrifugo open source HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. A user profile for Kimbley Kim is visible on the right.

The main content area displays a "My Incidents" section with a table showing details of a specific incident. The table rows are:

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

Below the table, a "DISCIPLINE INCIDENT HISTORY" section lists events:

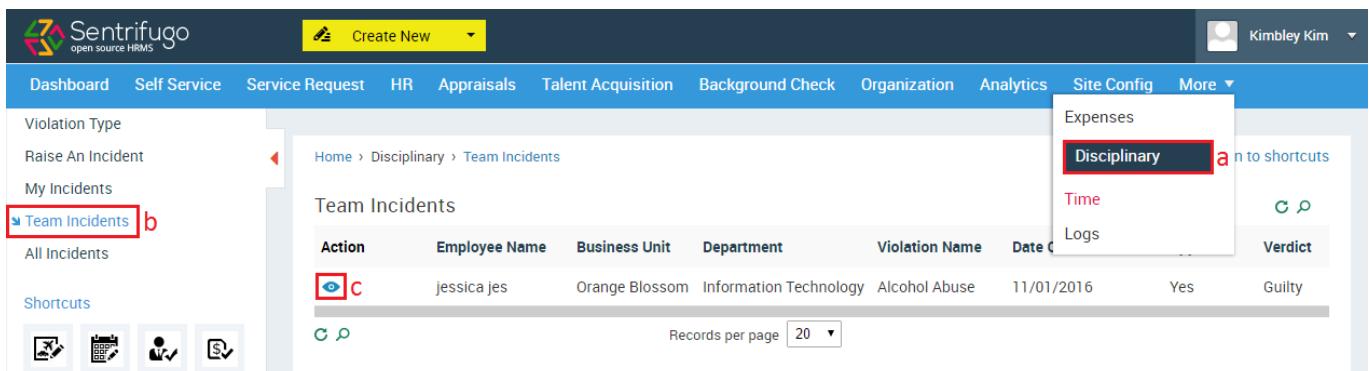
- Disciplinary incident verdict has been provided by Super Admin (11/04/2016 05:12 PM)
- Disciplinary incident verdict has been provided by Super Admin (11/04/2016 03:16 PM)
- Disciplinary incident verdict has been provided by Super Admin (11/04/2016 03:07 PM)
- Disciplinary incident verdict has been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

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

Figure 257

17.4 How do I view my team members' (employees) disciplinary incidents?

Please refer Figure 258

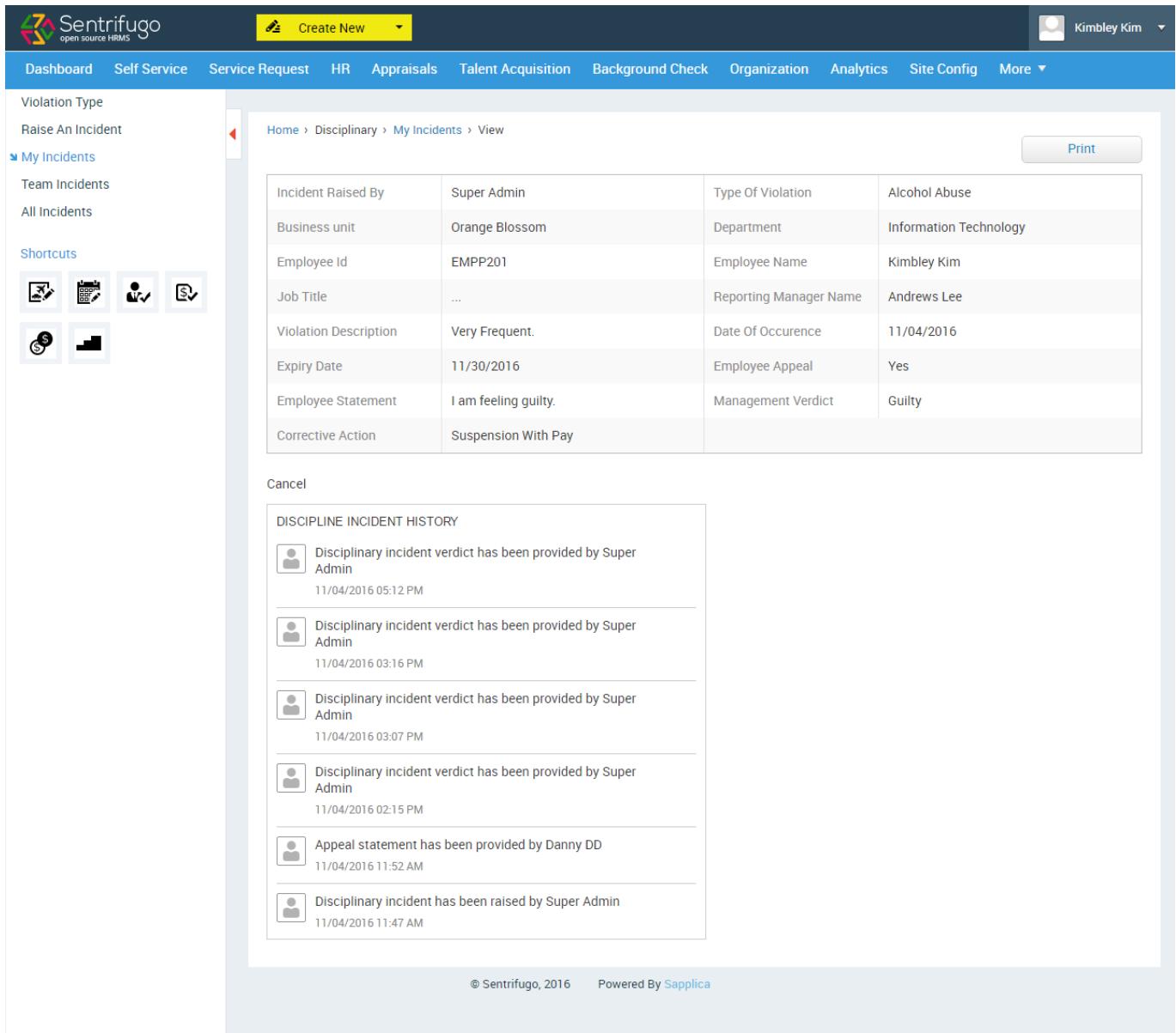


The screenshot shows the Sentrifugo open source HRMS application interface. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. The 'More' dropdown is open, showing options like Expenses, Disciplinary (which is highlighted with a red box), Time, Logs, and Verdict. Below the navigation bar, the main content area shows a breadcrumb path: Home > Disciplinary > Team Incidents. The main title is 'Team Incidents'. There's a table with columns: Action, Employee Name, Business Unit, Department, Violation Name, Date Created, and Status. One row is visible: Action (with a view icon highlighted with a red box 'c'), Employee Name (jessica jes), Business Unit (Orange Blossom), Department (Information Technology), Violation Name (Alcohol Abuse), Date Created (11/01/2016), and Status (Yes). Below the table are 'Records per page' dropdown and a 'View' icon. On the left sidebar, there are links for Violation Type, Raise An Incident, My Incidents, Team Incidents (highlighted with a red box 'b'), All Incidents, and Shortcuts (with four icons: a magnifying glass, a calendar, a person, and a document).

Figure 258

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

Please refer Figure 259



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. A user profile for "Kimbley Kim" is visible on the right.

The main content area displays a "My Incidents" section for "Team Incidents" and "All Incidents". Below this is a "Shortcuts" section with various icons. The central focus is a table showing details of a disciplinary incident:

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

Below the table is a "DISCIPLINE INCIDENT HISTORY" section listing events:

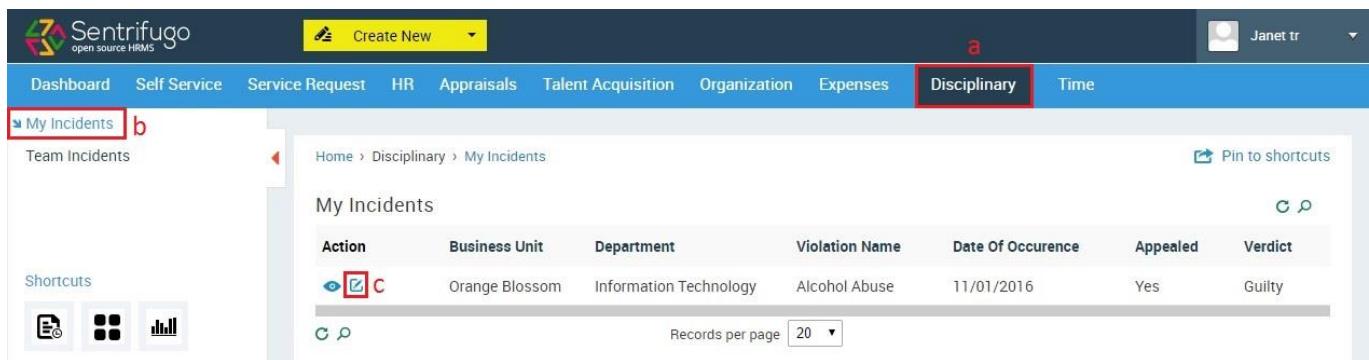
- Disciplinary incident verdict has been provided by Super Admin (11/04/2016 05:12 PM)
- Disciplinary incident verdict has been provided by Super Admin (11/04/2016 03:16 PM)
- Disciplinary incident verdict has been provided by Super Admin (11/04/2016 03:07 PM)
- Disciplinary incident verdict has been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

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Figure 259

17.5 How do I provide my appeal statement?

Please refer Figure 260



Dashboard Self Service Service Request HR Appraisals Talent Acquisition Organization Expenses **Disciplinary** Time

My Incidents **b**

Action Business Unit Department Violation Name Date Of OccurrenceAppealed Verdict

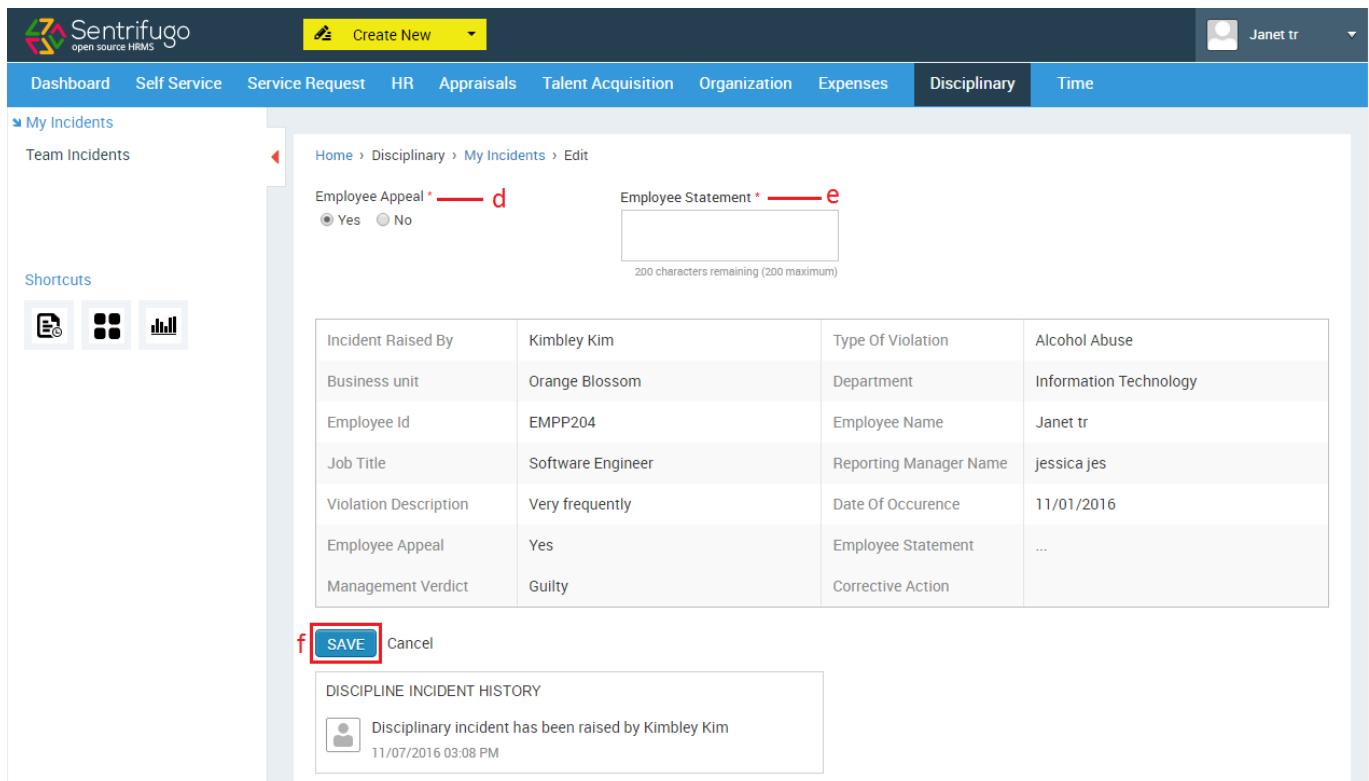
Orange Blossom Information Technology Alcohol Abuse 11/01/2016 Yes Guilty

Records per page 20

Figure 260

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

Please refer Figure 261



Employee Appeal * **d**

Employee Statement * **e**

200 characters remaining (200 maximum)

Incident Raised By	Kimbley Kim	Type Of Violation	Alcohol Abuse
Business unit	Orange Blossom	Department	Information Technology
Employee Id	EMPP204	Employee Name	Janet tr
Job Title	Software Engineer	Reporting Manager Name	jessica jes
Violation Description	Very frequently	Date Of Occurrence	11/01/2016
Employee Appeal	Yes	Employee Statement	...
Management Verdict	Guilty	Corrective Action	

f SAVE Cancel

DISCIPLINE INCIDENT HISTORY

Disciplinary incident has been raised by Kimbley Kim
11/07/2016 03:08 PM

Figure 261

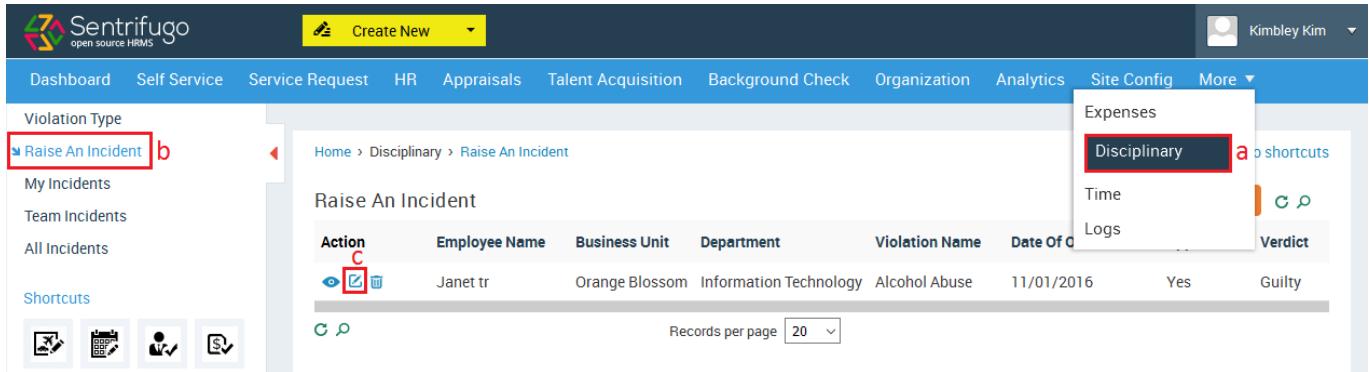
- Select **Yes** if you want to appeal and **No** if you don't want to appeal
- Provide your statement in the **Employee Statements** textbox
- Click **SAVE** button

17.6 How do I provide an appeal statement for another employee?



Only a Super Admin/Management can provide an appeal statement for other employees (if they're unavailable)

Please refer Figure 262

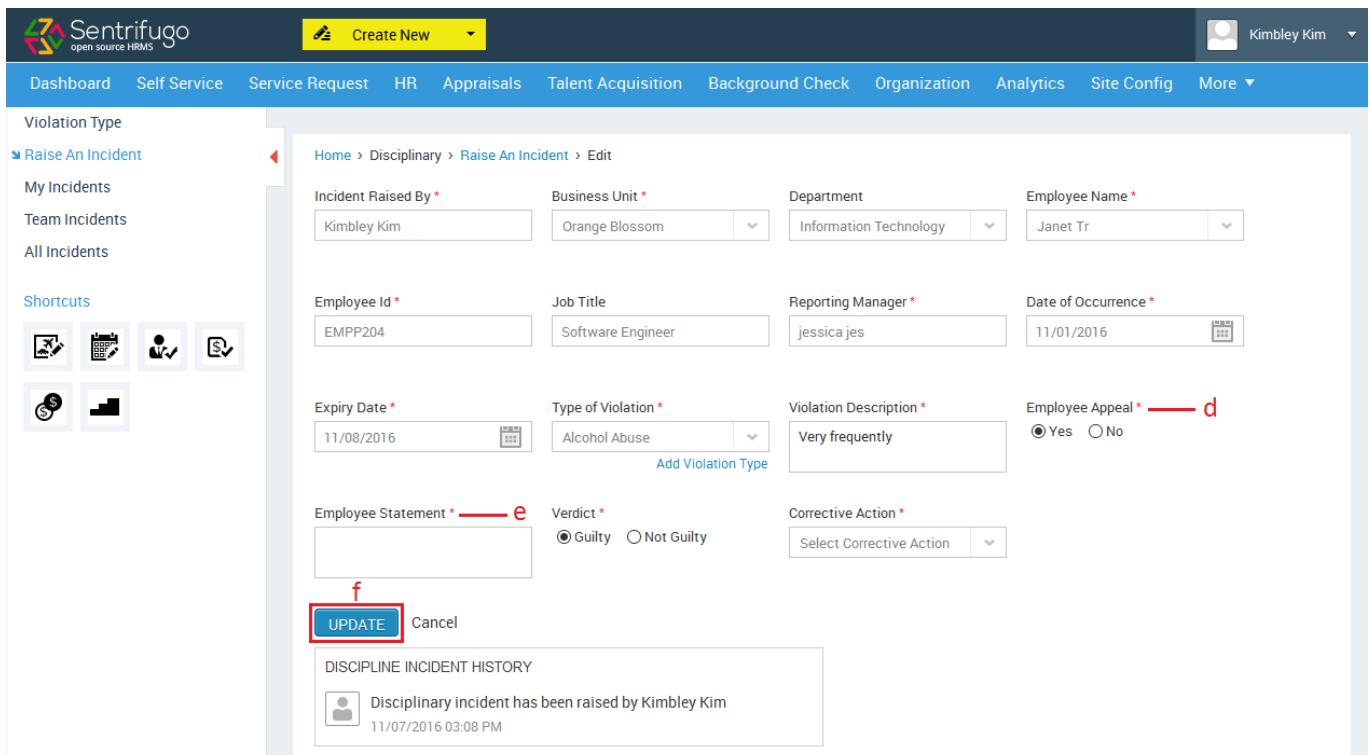


Action	Employee Name	Business Unit	Department	Violation Name	Date Of C	Verdict
	Janet Tr	Orange Blossom	Information Technology	Alcohol Abuse	11/01/2016	Yes

Figure 262

- Click **Disciplinary** in the top menu
- Click **Raise an Incident** on the left menu panel
- Click **Edit** icon in the Action column

Please refer Figure 263



Incident Raised By * Business Unit * Department Employee Name *

Employee Id * Job Title Reporting Manager * Date of Occurrence *

Expiry Date * Type of Violation * Violation Description * Employee Appeal * —— d

Employee Statement * —— e Verdict * Corrective Action *

DISCIPLINE INCIDENT HISTORY

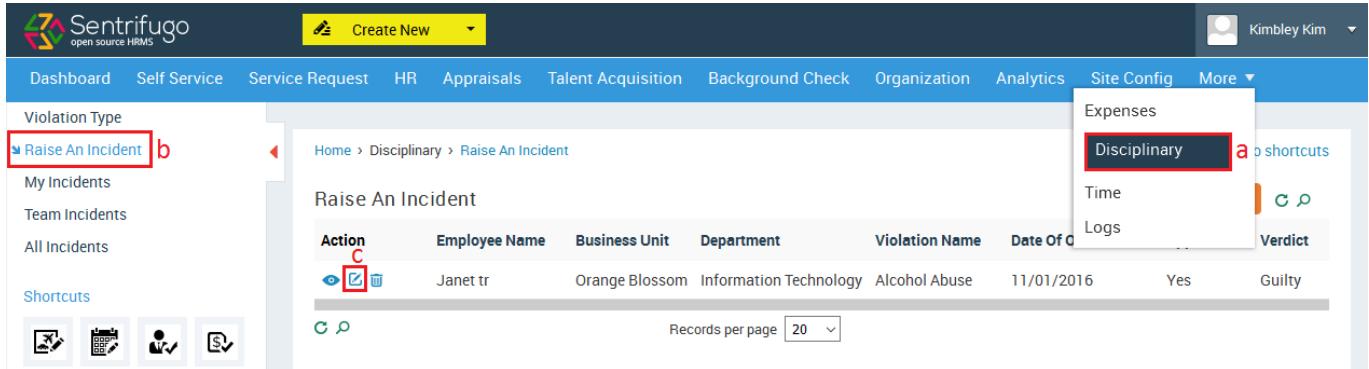
Disciplinary incident has been raised by Kimbley Kim 11/07/2016 03:08 PM

Figure 263

- d. Select **Yes** if the employee wants to appeal and **No** if the employee cannot appeal
- e. Provide the employee's statement in the **Employee Statement** textbox
- f. Click **Update** button

17.7 How do I take a corrective action against an employee?

Please refer Figure 264



Action	Employee Name	Business Unit	Department	Violation Name	Date Of C	Appeal	Verdict
	Janet tr	Orange Blossom	Information Technology	Alcohol Abuse	11/01/2016	Yes	Guilty

Figure 264

- a. Click **Disciplinary** in the top menu
- b. Click **Raise an Incident** on the left menu panel
- c. Click **Edit** icon in the Action column

Please refer Figure 265

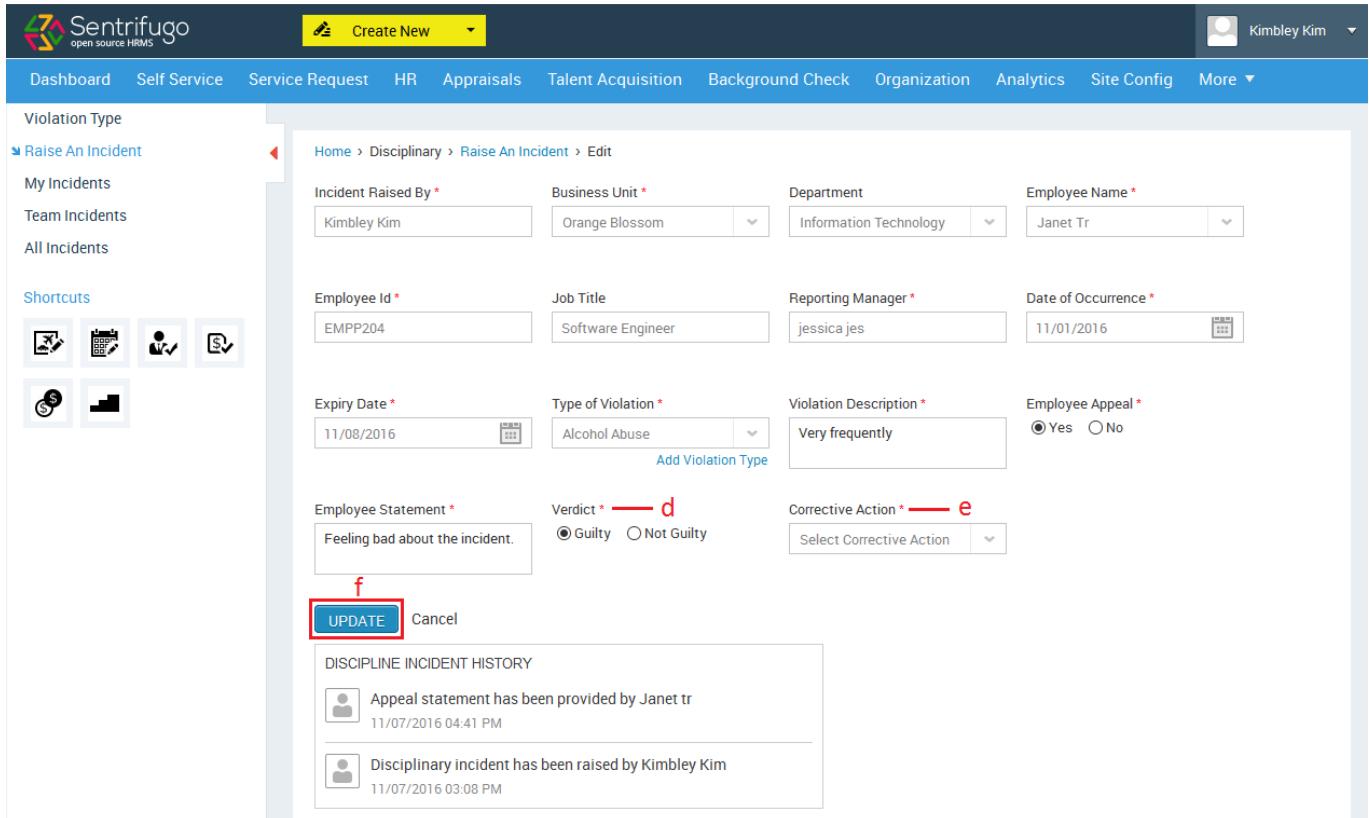
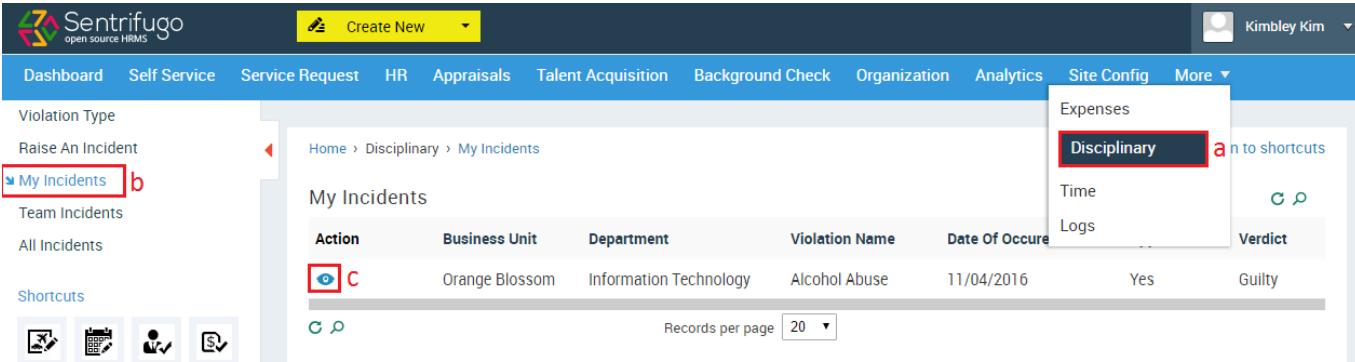


Figure 265

- d. Select **Yes** if the employee is guilty and **No** if the employee is not guilty
- e. Select a **Corrective Action** that needs to be taken against an employee
- f. Click **Update** button

17.8 How do I print my disciplinary incident?

Please refer Figure 266

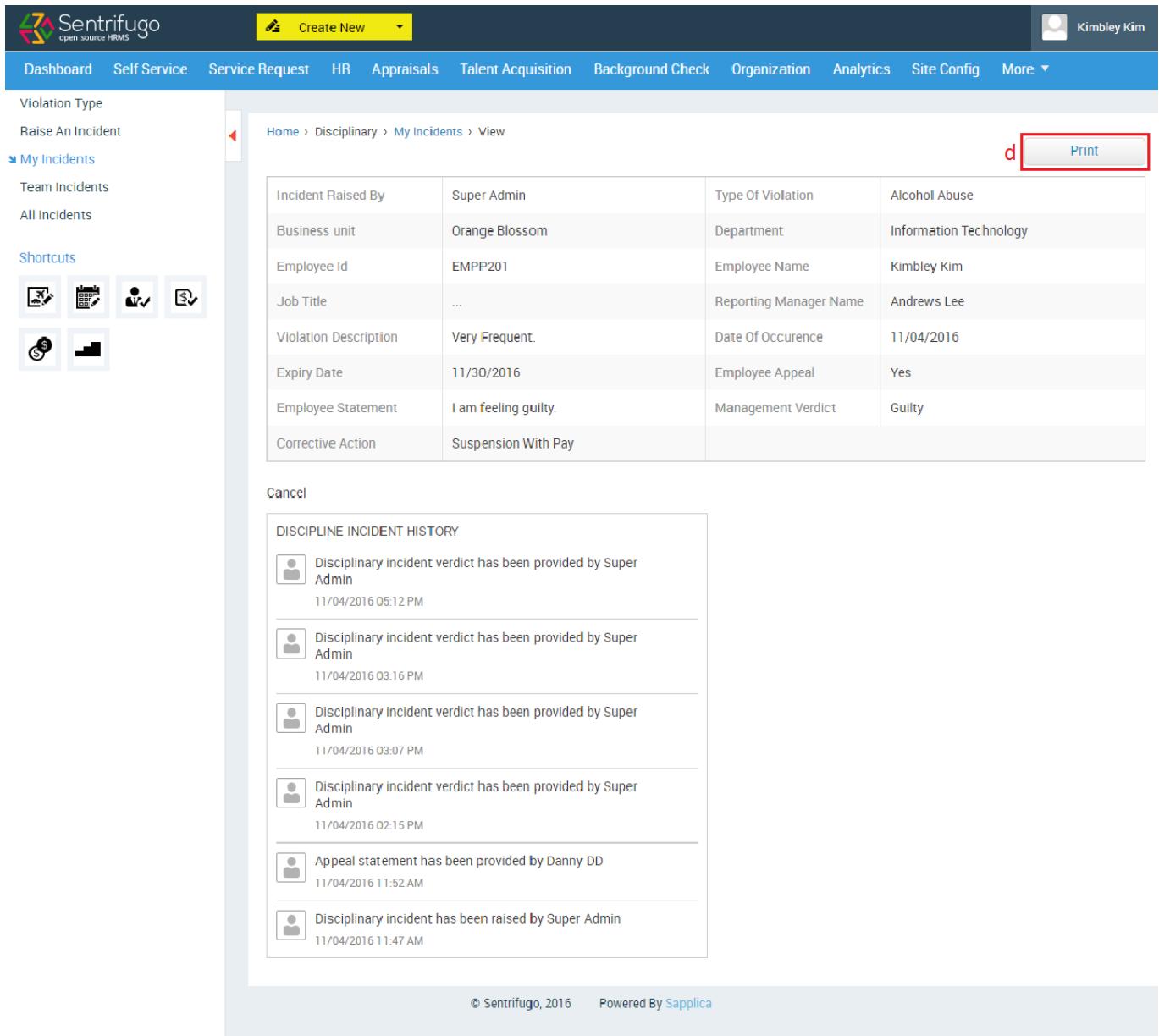


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. A dropdown menu under 'More' is open, showing options like Expenses, Disciplinary (which is highlighted with a red box), Time, Logs, and Verdict. On the left, a sidebar has links for Violation Type, Raise An Incident, My Incidents (highlighted with a red box), Team Incidents, All Incidents, and Shortcuts. The main content area shows a list titled 'My Incidents' with columns for Action, Business Unit, Department, Violation Name, Date Of Occurrence, Verdict, and Log. One row is visible: Action (View icon highlighted with a red box), Business Unit (Orange Blossom), Department (Information Technology), Violation Name (Alcohol Abuse), Date Of Occurrence (11/04/2016), Verdict (Yes), and Log (Guilty). At the bottom, there are icons for Print, Calendar, User, and Refresh.

Figure 266

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

Please refer Figure 267



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. On the far right, a user profile for 'Kimbley Kim' is shown. Below the navigation bar, a sidebar on the left contains links for Violation Type, Raise An Incident, My Incidents (which is selected and highlighted with a blue arrow), Team Incidents, All Incidents, and Shortcuts (with icons for Home, Search, and Help).

The main content area displays a disciplinary incident view. The URL in the browser is 'Home > Disciplinary > My Incidents > View'. A 'Print' button is located in the top right corner of this view. The incident details table includes the following data:

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

Below the table, a 'Cancel' link is present. A 'DISCIPLINE INCIDENT HISTORY' section lists the following events:

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

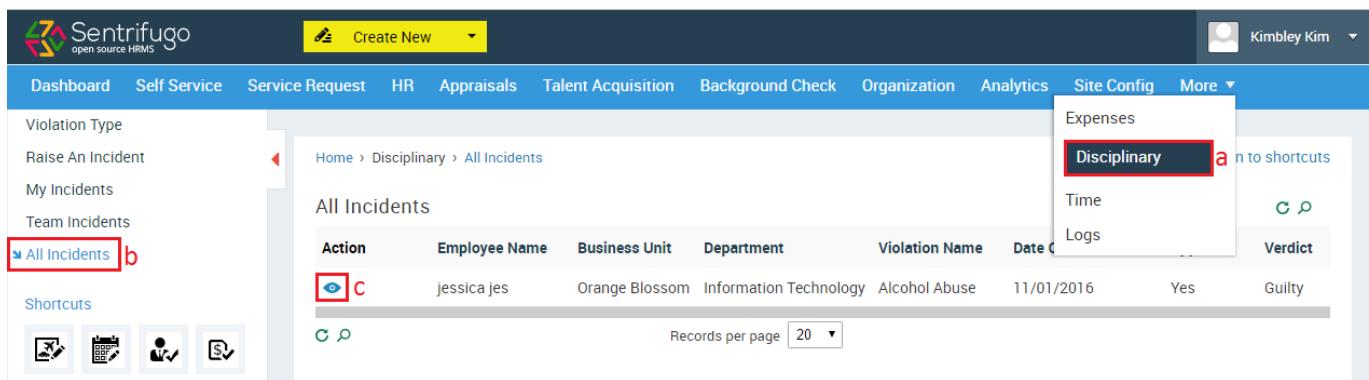
At the bottom of the page, there are copyright and power information: © Sentrifugo, 2016 and Powered By Sapplica.

Figure 267

d. Click **Print** button

17.9 How do I print an employee's disciplinary incident?

Please refer Figure 268

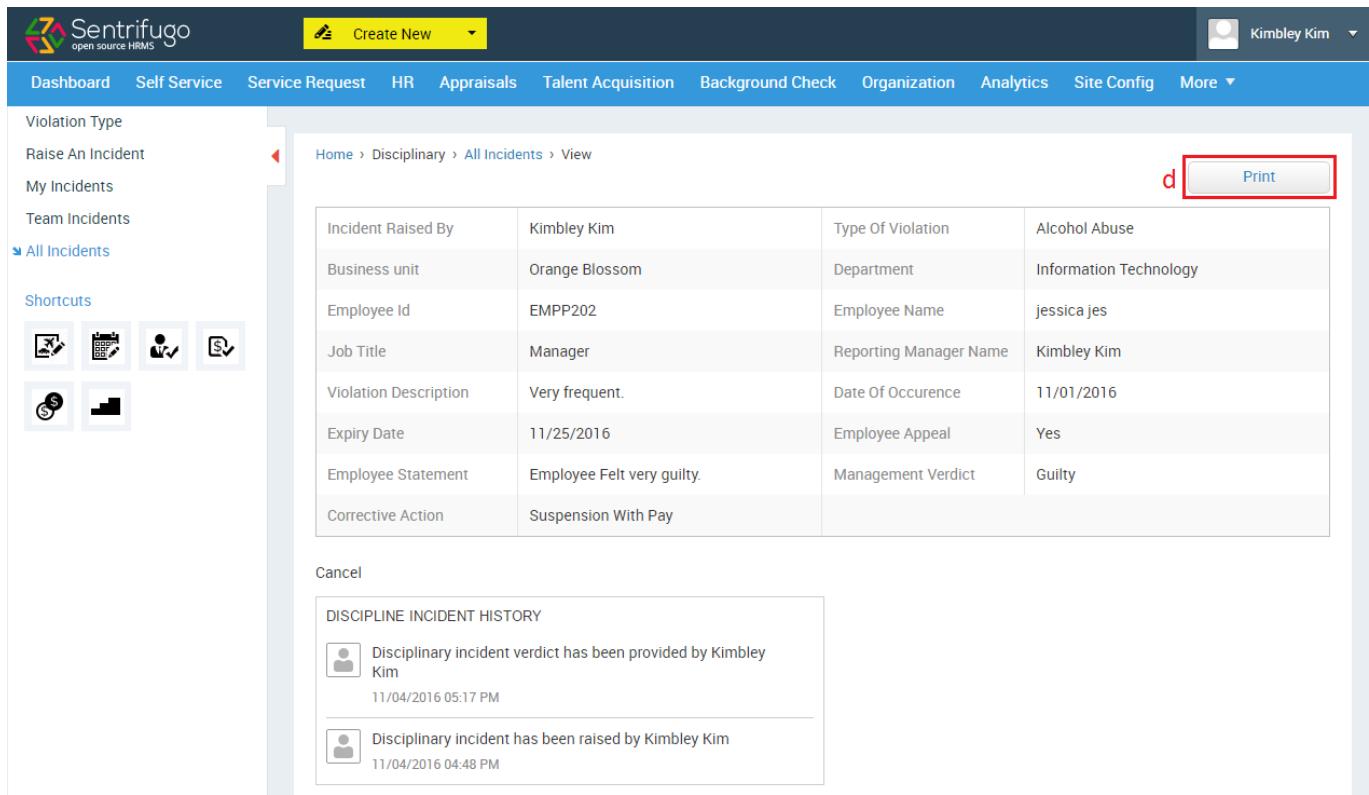


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. The 'Disciplinary' link is highlighted with a red box 'a'. On the left, a sidebar lists Violation Type, Raise An Incident, My Incidents, Team Incidents, and a selected 'All Incidents' link, all enclosed in a red box 'b'. The main content area displays a table titled 'All Incidents' with columns for Action, Employee Name, Business Unit, Department, Violation Name, Date, and Verdict. One row is shown: jessica jes, Orange Blossom, Information Technology, Alcohol Abuse, 11/01/2016, Yes, Guilty. A red box 'c' highlights the 'View' icon in the Action column. A dropdown menu for 'Disciplinary' is open, showing options like Expenses, Time, Logs, and Verdict.

Figure 268

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

Please refer Figure 269



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar and sidebar are identical to Figure 268. The main content area shows a detailed view of a disciplinary incident. A red box 'd' highlights the 'Print' button in the top right. Below it is a table with columns for Incident Raised By, Type Of Violation, Business unit, Department, Employee Id, Employee Name, Job Title, Reporting Manager Name, Violation Description, Date Of Occurrence, Expiry Date, Employee Appeal, Employee Statement, Management Verdict, and Corrective Action. The table data is as follows:

Incident Raised By	Kimbley Kim	Type Of Violation	Alcohol Abuse
Business unit	Orange Blossom	Department	Information Technology
Employee Id	EMPP202	Employee Name	jessica jes
Job Title	Manager	Reporting Manager Name	Kimbley Kim
Violation Description	Very frequent.	Date Of Occurrence	11/01/2016
Expiry Date	11/25/2016	Employee Appeal	Yes
Employee Statement	Employee Felt very guilty.	Management Verdict	Guilty
Corrective Action	Suspension With Pay		

At the bottom, a 'DISCIPLINE INCIDENT HISTORY' box contains two entries:

- Disciplinary incident verdict has been provided by Kimbley Kim
11/04/2016 05:17 PM
- Disciplinary incident has been raised by Kimbley Kim
11/04/2016 04:48 PM

Figure 269

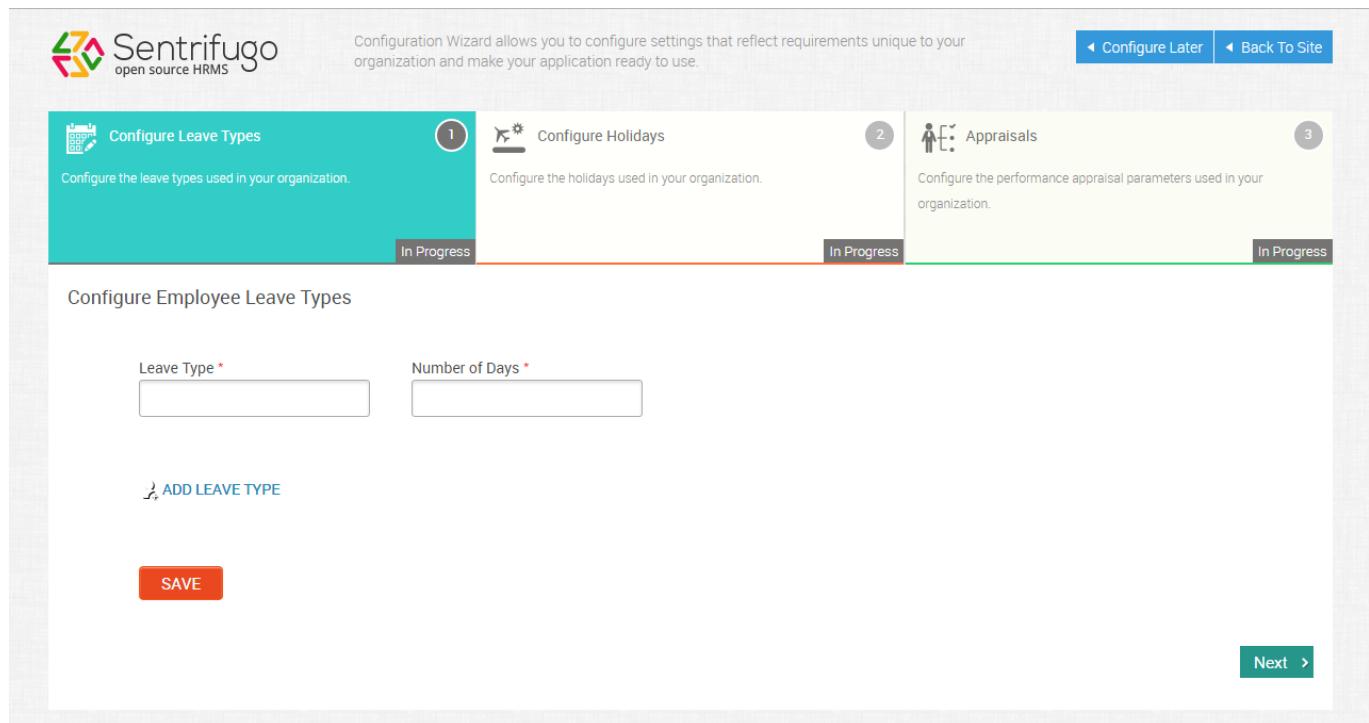
- Click **Print** button

18. 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 Later](#) [◀ Back To Site](#)

1  **Configure Leave Types**
Configure the leave types used in your organization.
In Progress

2  **Configure Holidays**
Configure the holidays used in your organization.
In Progress

3  **Appraisals**
Configure the performance appraisal parameters used in your organization.
In Progress

Configure Employee Leave Types

Leave Type *
Number of Days *

[ADD LEAVE TYPE](#)

SAVE

Next >

- **Configure Leave Types:** Create leave types (E.g. Sick, Vacation) and allocate the number of days for each leave type.

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](#)

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> ✓ Configure Leave Types Configure the leave types used in your organization. </div>	<div style="background-color: orange; border: 1px solid #ccc; color: white; padding: 5px; margin-bottom: 10px;"> ✓ Configure Holidays Configure the holidays used in your organization. </div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> ○ Appraisals Configure the performance appraisal parameters used in your organization. </div>
Completed	In Progress	In Progress

Configure Holidays

Holiday Group *

Select Holiday Group | ▾

[Add Holiday Group](#)

Holiday *

Date ? *

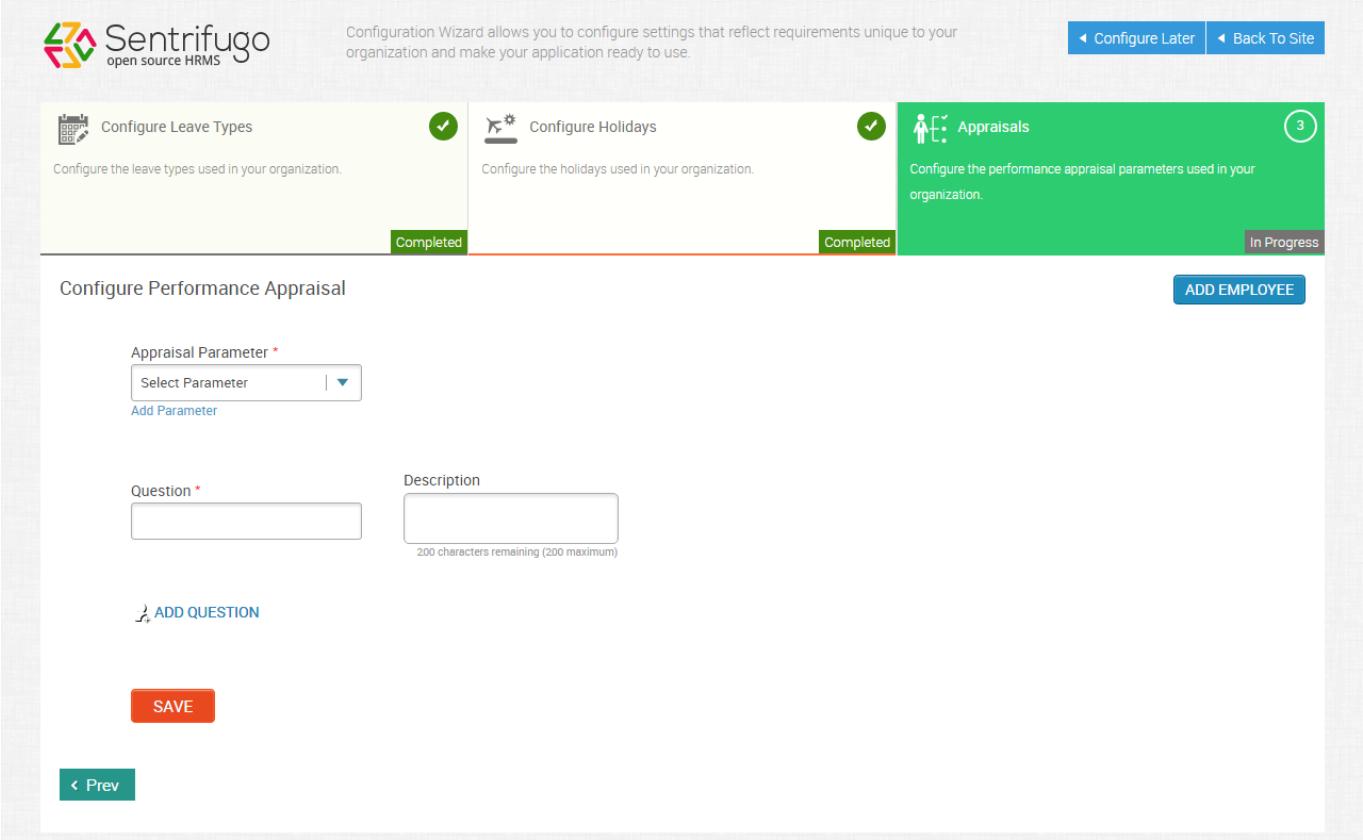
[ADD HOLIDAY](#)

SAVE

[◀ Prev](#)

[Next ▶](#)

- **Configure Holidays:** Create holiday groups and assign holidays to each group.



The screenshot shows the Configuration Wizard interface. At the top, there's a header with the Sentrifugo logo and a message: "Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use." Below the header are three cards:

- Configure Leave Types**: Shows a checkmark icon and the status "Completed".
- Configure Holidays**: Shows a checkmark icon and the status "Completed".
- Appraisals**: Shows a checkmark icon and the status "In Progress".

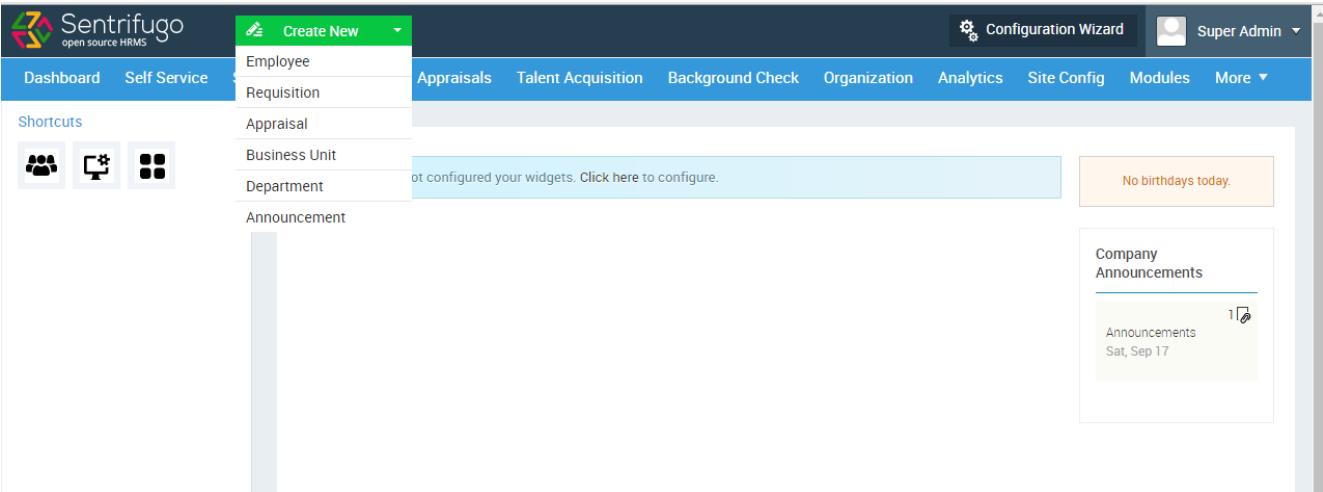
In the main content area, there's a section titled "Configure Performance Appraisal" with a "Completed" status. It includes fields for "Appraisal Parameter" (with a dropdown menu showing "Select Parameter" and an "Add Parameter" button), "Question" (with an input field), "Description" (with an input field and a note "200 characters remaining (200 maximum)"), and a "ADD QUESTION" button. There's also a red "SAVE" button.

At the bottom left is a "Prev" button, and at the top right are "Configure Later" and "Back To Site" buttons.

- **Appraisals:** Add appraisal parameters (E.g. KPI, KRA) and allot questions for each parameter.

Create New Shortcut Button

This shortcut button is placed on the top left corner (beside your organization logo) of the application. This button has been designed to save your time from menu redirections. The number of options displayed depends on a user's role privileges. For example, if you belong to the Management role group, then you will be able to create new Employees, Requisitions, Appraisals, Business Units, and Departments etc. If you belong to the Employee role group you can only create Service and Leave requests.



The screenshot shows the Sentrifugo dashboard. At the top, there's a navigation bar with the Sentrifugo logo, a "Create New" button (highlighted in green), "Configuration Wizard", "Super Admin" (highlighted in green), and a "Dashboard" link. The main content area includes:

- A "Shortcuts" sidebar with icons for Employees, Requisitions, Appraisals, Business Unit, Department, and Announcement.
- A "Create New" dropdown menu with options: Employee, Requisition, Appraisal, Business Unit, Department, and Announcement.
- Links for "Appraisals", "Talent Acquisition", "Background Check", "Organization", "Analytics", "Site Config", "Modules", and "More".
- A message: "Not configured your widgets. Click here to configure."
- A "No birthdays today" message.
- A "Company Announcements" section with a message: "Announcements Sat, Sep 17".