



Sentrifugo

open source HRMS

3.1 Sentrifugo 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.



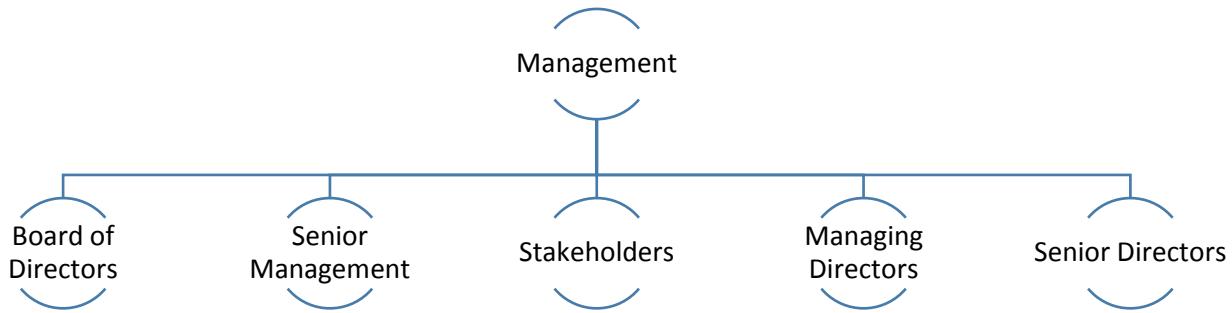
Since the Super Admin will not be included in the employee's list, he/she will not be able to perform employee actions like raising a leave request, service request, submitting timesheets etc. You can add another employee to Sentrifugo for the Super Admin user, with his/her actual details like Name,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

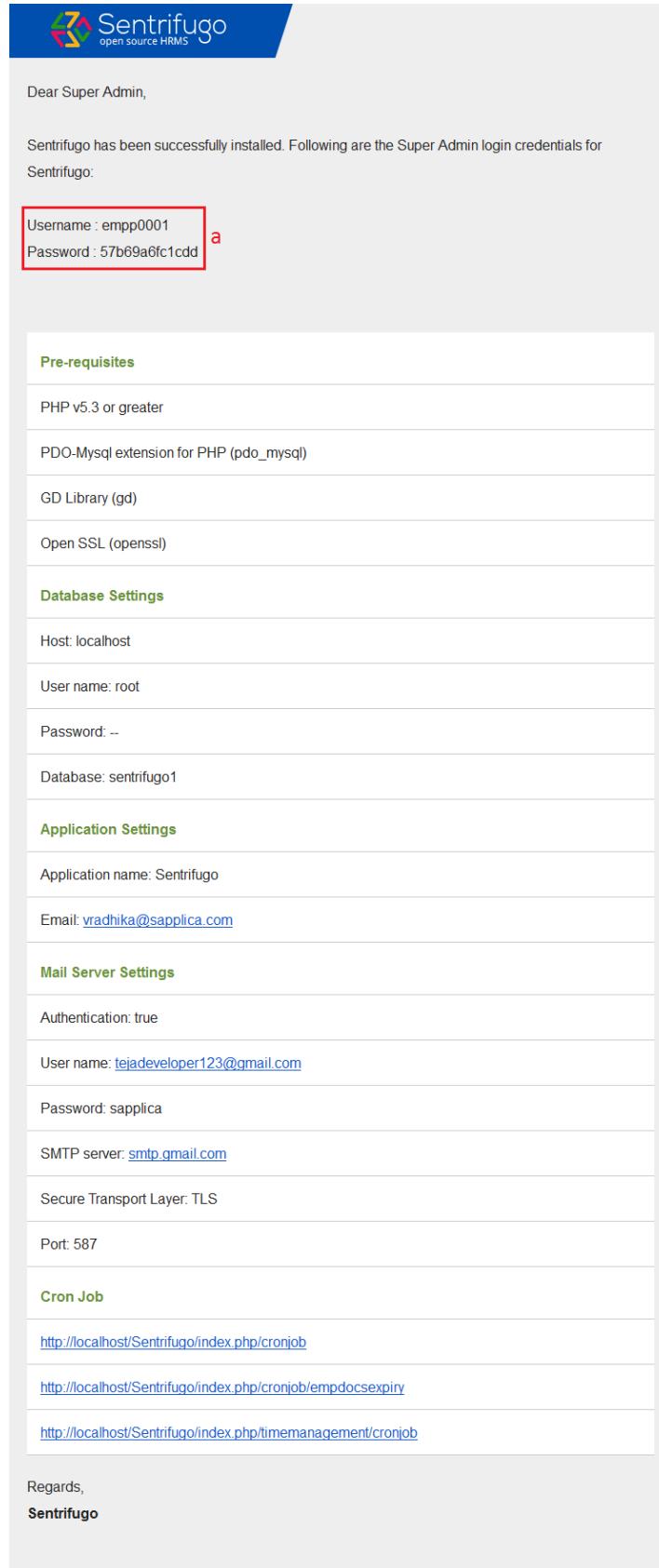


Figure 2

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.

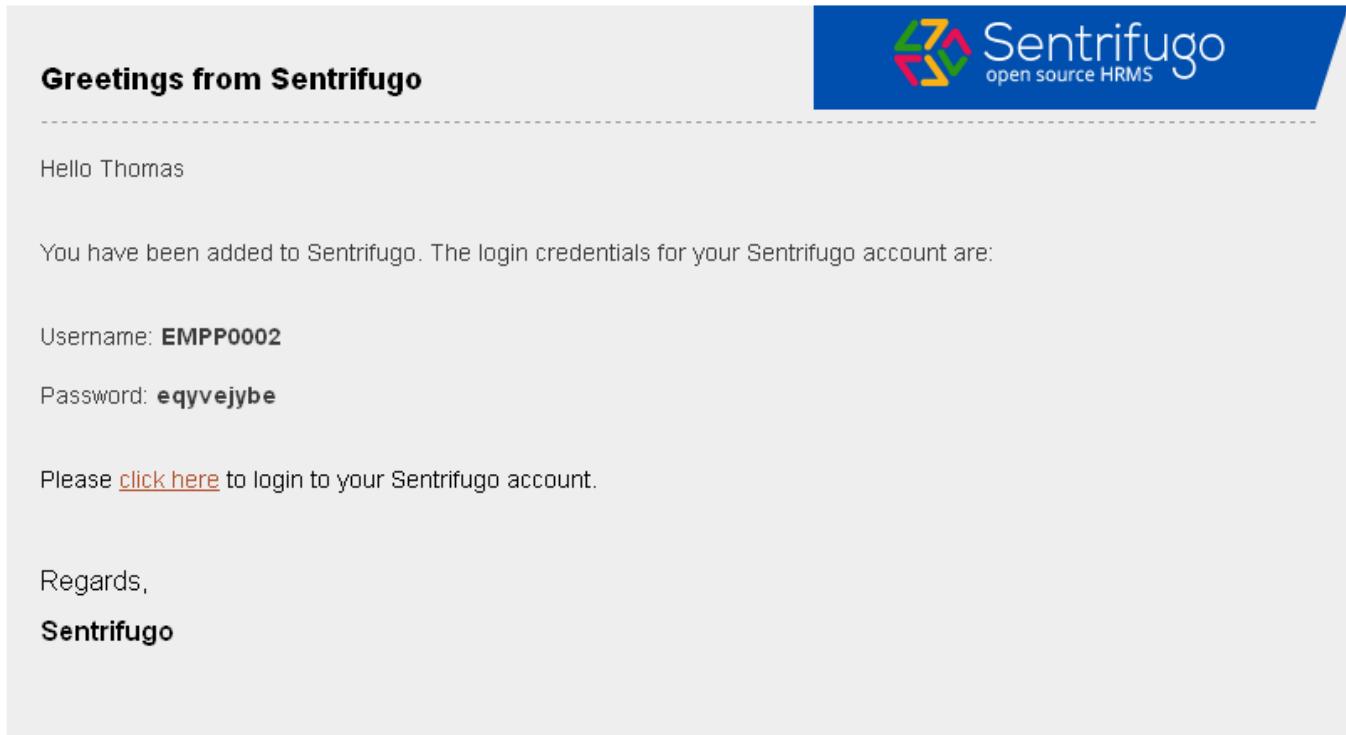
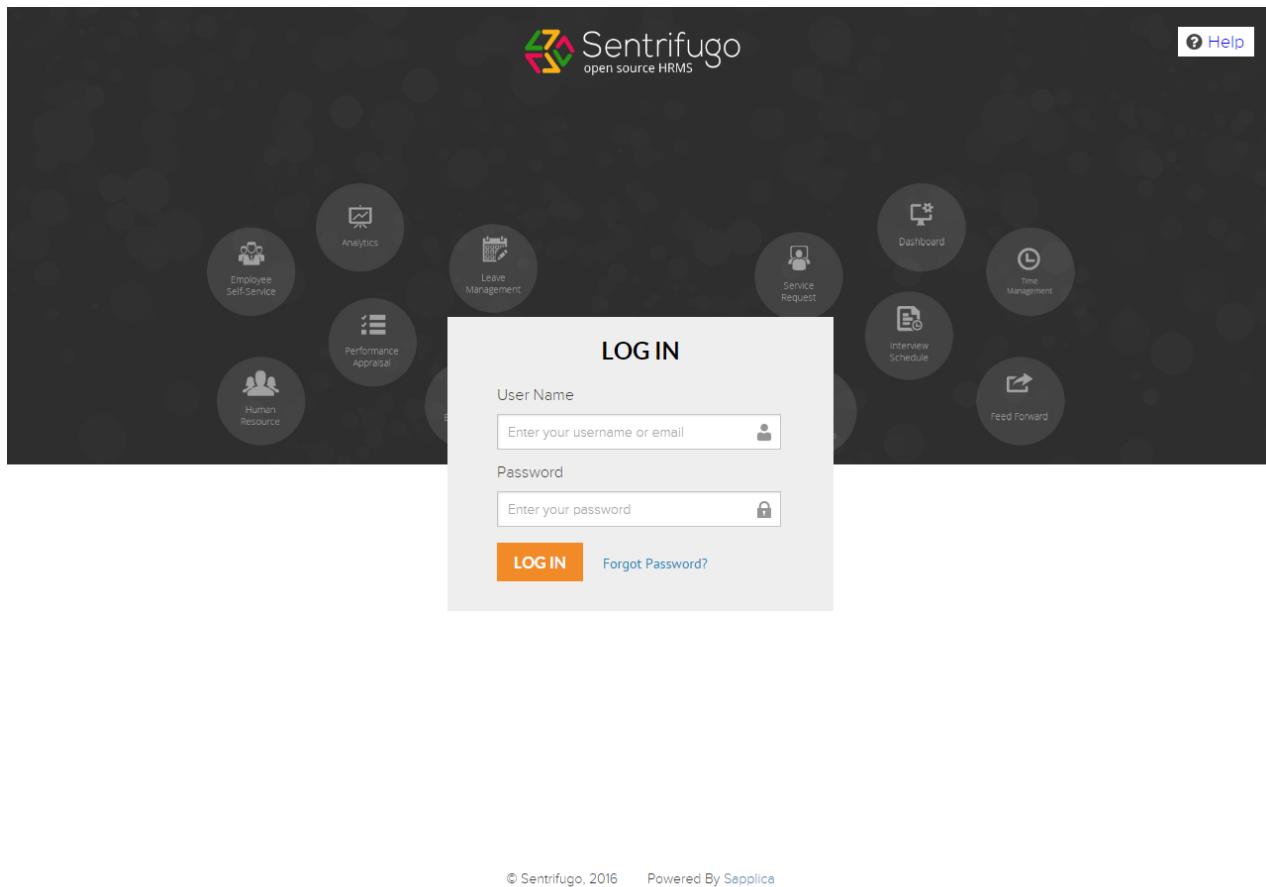


Figure 3

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.

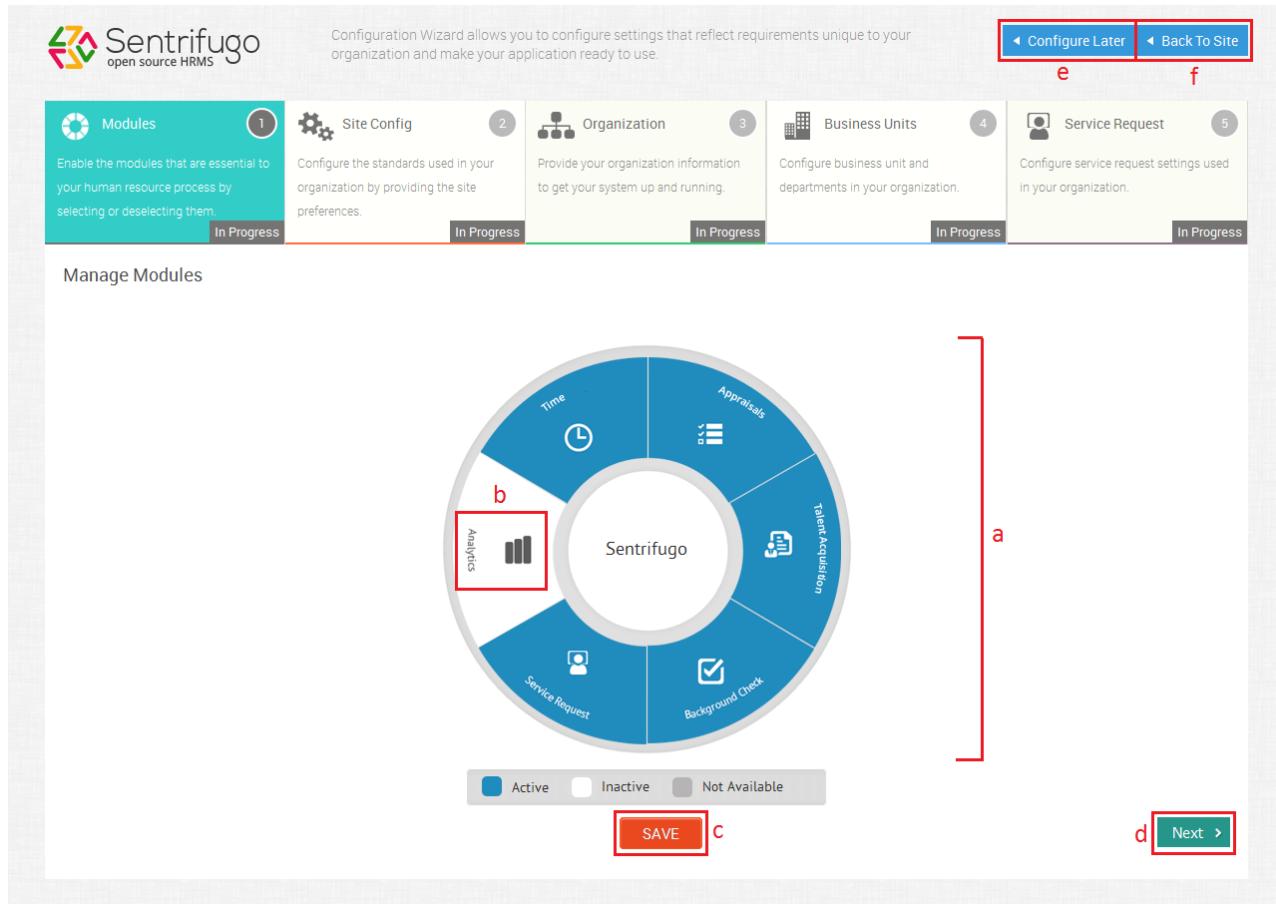
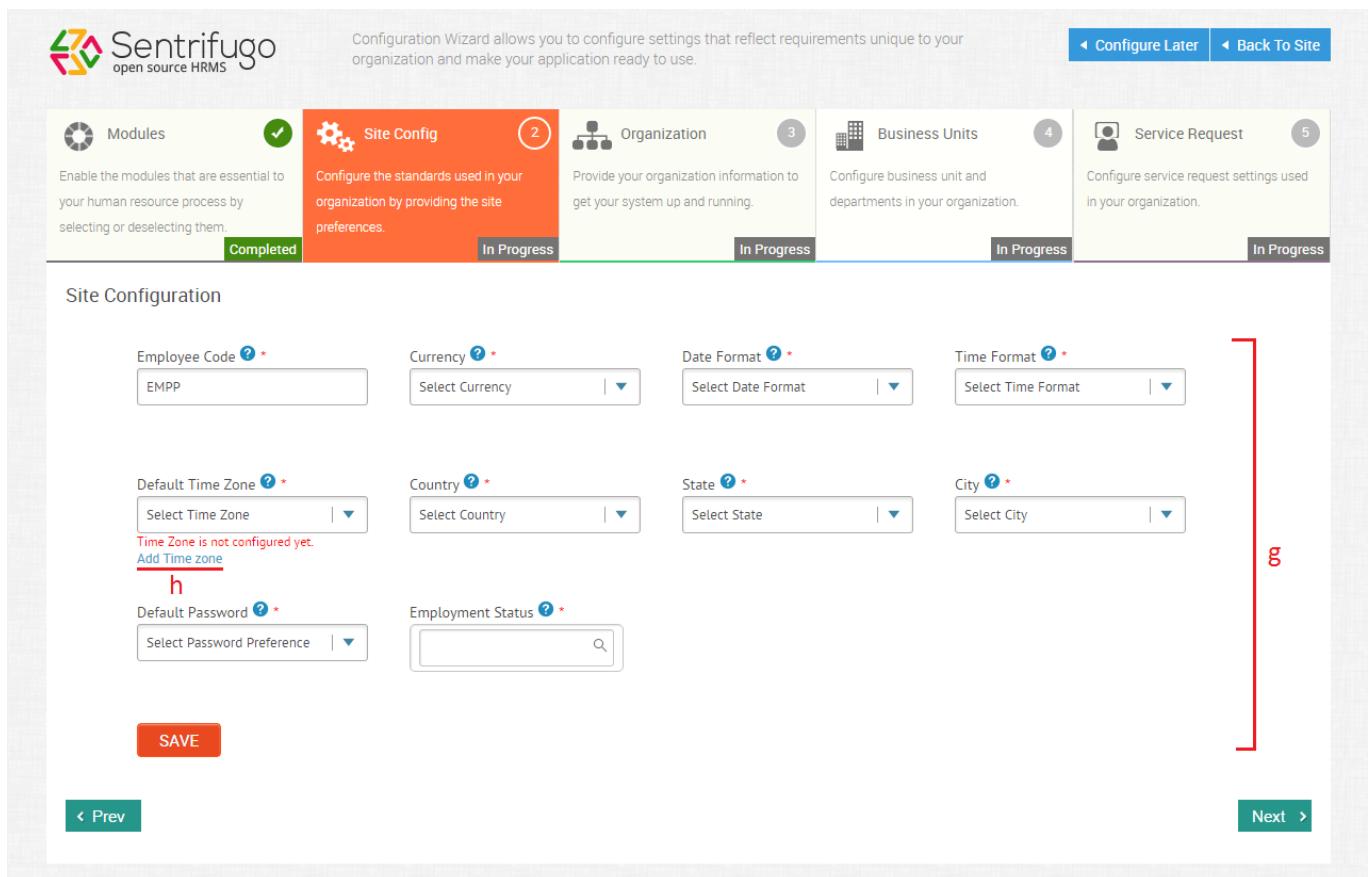


Figure 4

- 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 ? *

Select Currency | ▾

Date Format ? *

Select Date Format | ▾

Time Format ? *

Select Time Format | ▾

Default Time Zone ? *

Select Time Zone | ▾

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

Country ? *

Select Country | ▾

State ? *

Select State | ▾

City ? *

Select City | ▾

Default Password ? *

Select Password Preference | ▾

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

Configure Organization Information

Organization ? *
Website ? *
Organization Started On ?
Total Employees ? *

Primary Phone Number ?
Secondary Phone Number ?
Fax Number ?
Country ? *

State ? *
City ? *
Main Branch Address ?
Address 1 ?

Address 2 ?
Organization Description ?

Upload Organization Logo ?
Business Domain ?



SAVE

< Prev
Next >

Figure 6

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

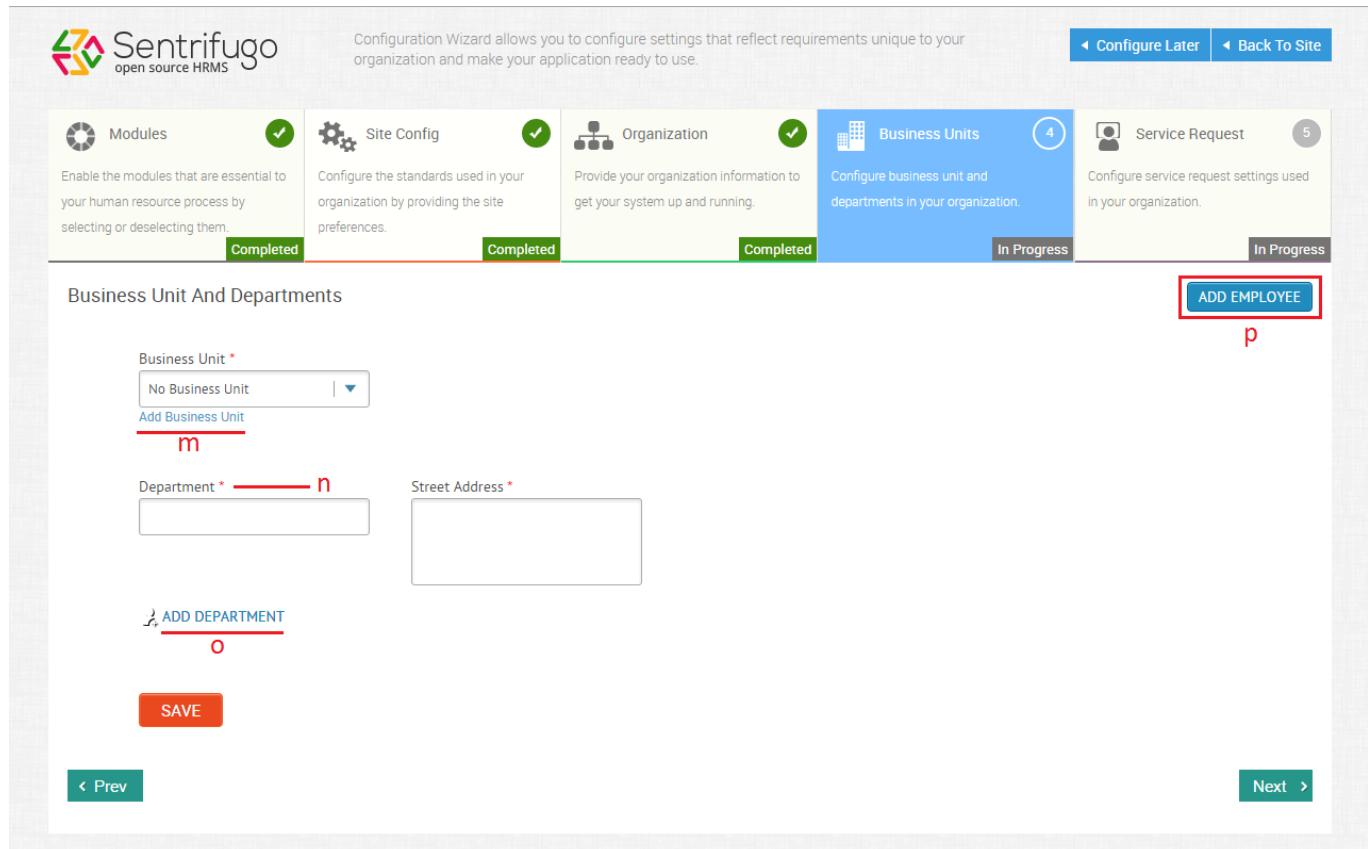
After saving your organization's details, an **ADD Employee** button will appear on the top right corner of the configuration wizard screen. However, it is not mandatory to add an employee in this step, you can even add an employee after the entire configuration is completed.

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

Step 4: Business Units

You can create business units and departments here.

Please refer Figure 7.



The screenshot shows the Sentrifugo Configuration Wizard at Step 4: Business Units. The top navigation bar includes links for 'Configure Later' and 'Back To Site'. Below the navigation, there are five tabs: 'Modules' (Completed), 'Site Config' (Completed), 'Organization' (Completed), 'Business Units' (In Progress, highlighted in blue), and 'Service Request' (In Progress). The main content area is titled 'Business Unit And Departments'. It contains fields for 'Business Unit *' (dropdown menu showing 'No Business Unit' with an 'm' label above it) and 'Department *' (input field with an 'n' label above it). There is also a 'Street Address *' input field. A red box highlights the 'ADD EMPLOYEE' button. At the bottom left is a 'SAVE' button, and at the bottom right are 'Prev' and 'Next' navigation buttons.

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 * q r

Description

200 characters remaining (200 maximum)

[ADD REQUEST TYPE](#)

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.

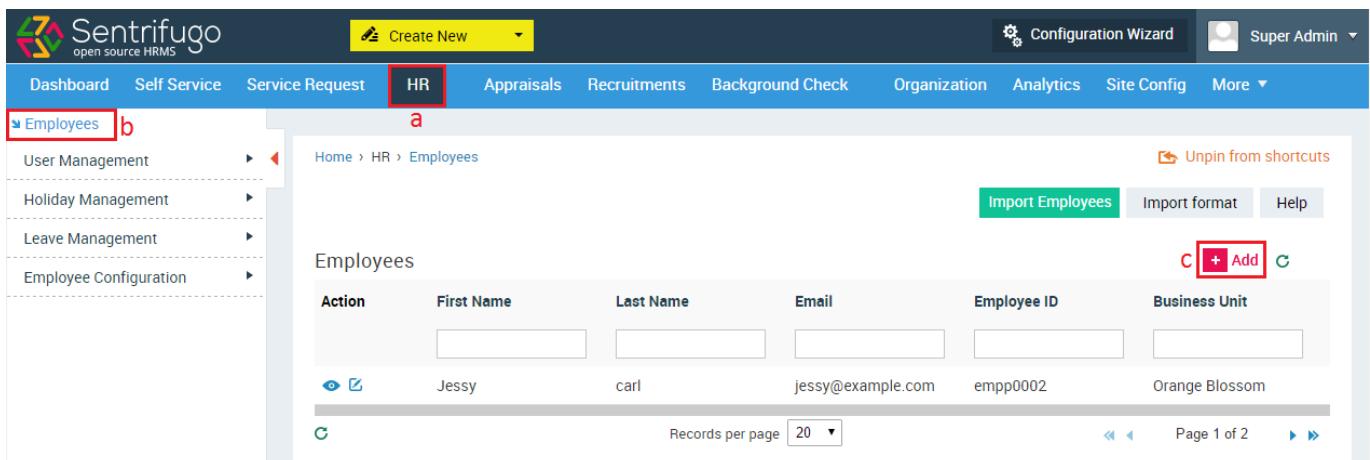
The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (which is highlighted in yellow), Appraisals, Recruitments, Background Check, Organization, Site Config, Modules, Time, and Logs. The top right corner shows a 'Configuration Wizard' button (highlighted with a red box 'd'), a 'Super Admin' dropdown, and a 'Pin to shortcuts' link. On the left, a sidebar menu under 'Employees' lists User Management, Holiday Management, Leave Management, and Employee Configuration. Under 'SHORTCUTS', it says 'You have not configured your shortcut icons. Click here to configure'. The main content area is titled 'MANAGEMENT DETAILS' and contains fields for Employee ID (EMPP0002), First Name, Last Name, Prefix, Role, Email, Job Title (with an error message 'Job titles are not configured yet.'), Position (with an error message 'Positions are not configured yet.'), Date of Joining, and Management Description (with a note '200 characters remaining (200 maximum)'). At the bottom are 'SAVE' and 'Cancel' buttons.

Figure 9

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

1.4.2 Adding Other Employees

Please refer Figure 10.



The screenshot shows the Sentrifugo HRM system interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR (highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. Below the navigation bar is a left sidebar with options like User Management, Holiday Management, Leave Management, and Employee Configuration. The main content area is titled 'Employees' (also highlighted with a red box) and shows a list of employees with columns for Action, First Name, Last Name, Email, Employee ID, and Business Unit. A new employee record is listed: Jessy, carl, jessy@example.com, empp0002, Orange Blossom. There are buttons for Import Employees, Import format, and Help. On the right side of the main content area, there is a '+ Add' button (highlighted with a red box). The URL in the browser is Home > HR > Employees.

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.

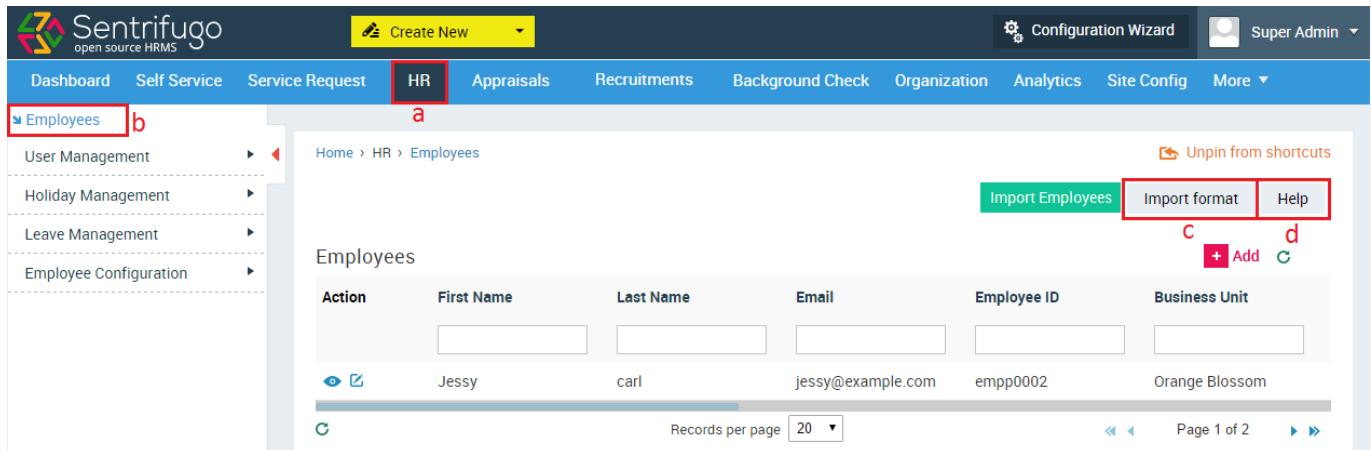
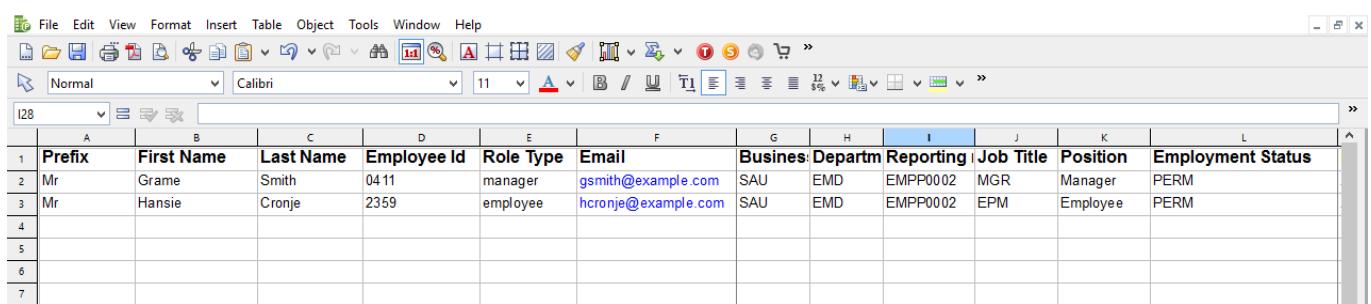


Figure 12

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

Figure 13

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

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

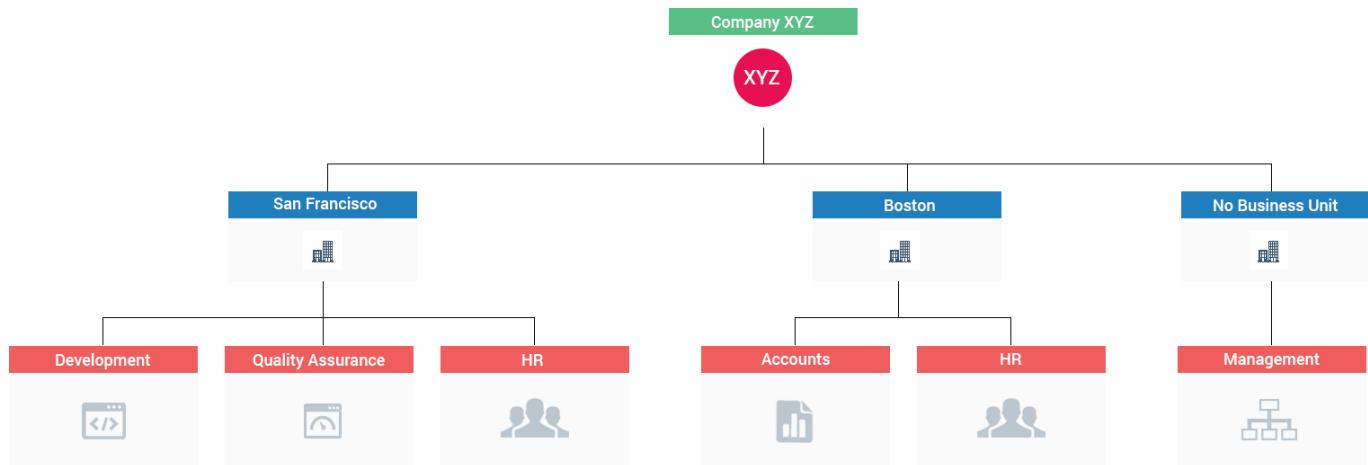
For example: <http://example.com/sentrifugo/index.php/cronjob>



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

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

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



1.5.1 Adding Business Units

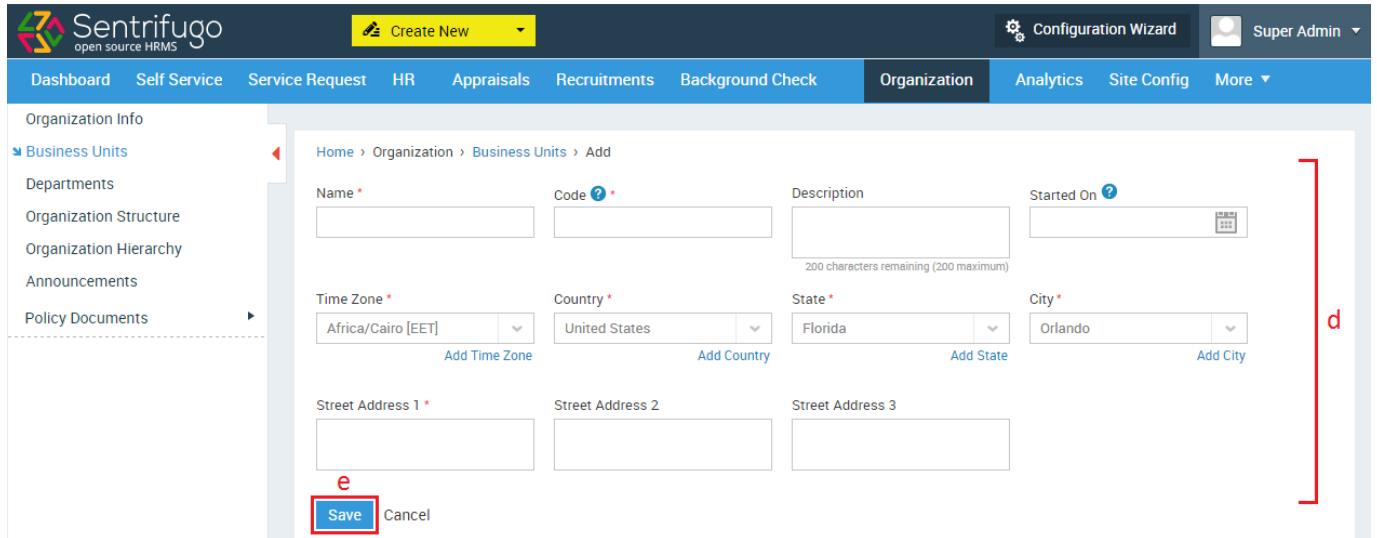
Please refer Figure 14.

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

Figure 14

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

Please refer Figure 15.



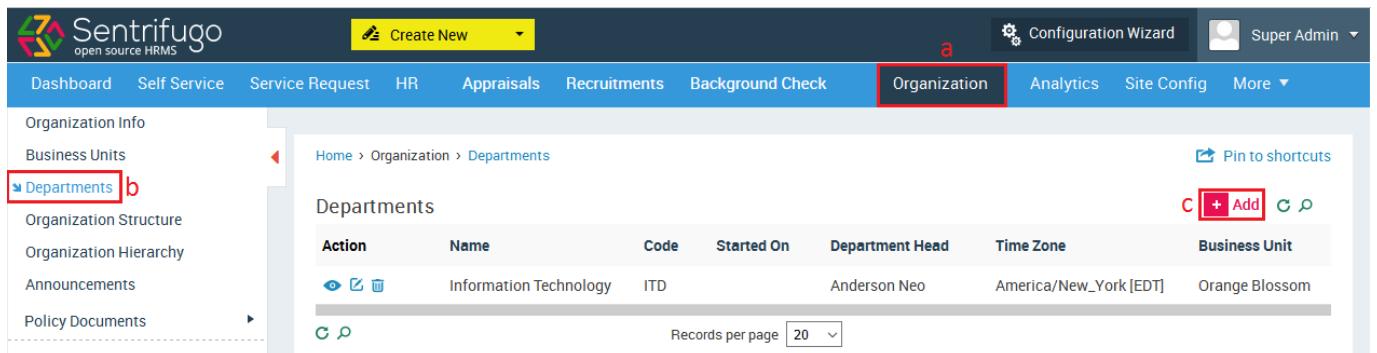
The screenshot shows the Sentrifugo application interface for adding a new Business Unit. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization (highlighted in blue), Analytics, Site Config, and More. On the left, a sidebar lists Organization Info, Business Units (highlighted in red), Departments, Organization Structure, Organization Hierarchy, Announcements, and Policy Documents. The main content area displays a form for 'Add' a Business Unit. Fields include Name*, Code*, Description, Started On, Time Zone (Africa/Cairo [EET]), Country (United States), State (Florida), City (Orlando), Street Address 1, Street Address 2, and Street Address 3. Buttons for Save, Cancel, Add Time Zone, Add Country, Add State, and Add City are also present. A red bracket labeled 'd' points to the right side of the form, and a red box labeled 'e' highlights the 'Save' button.

Figure 15

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

1.5.2 Adding Departments

Please refer Figure 16.

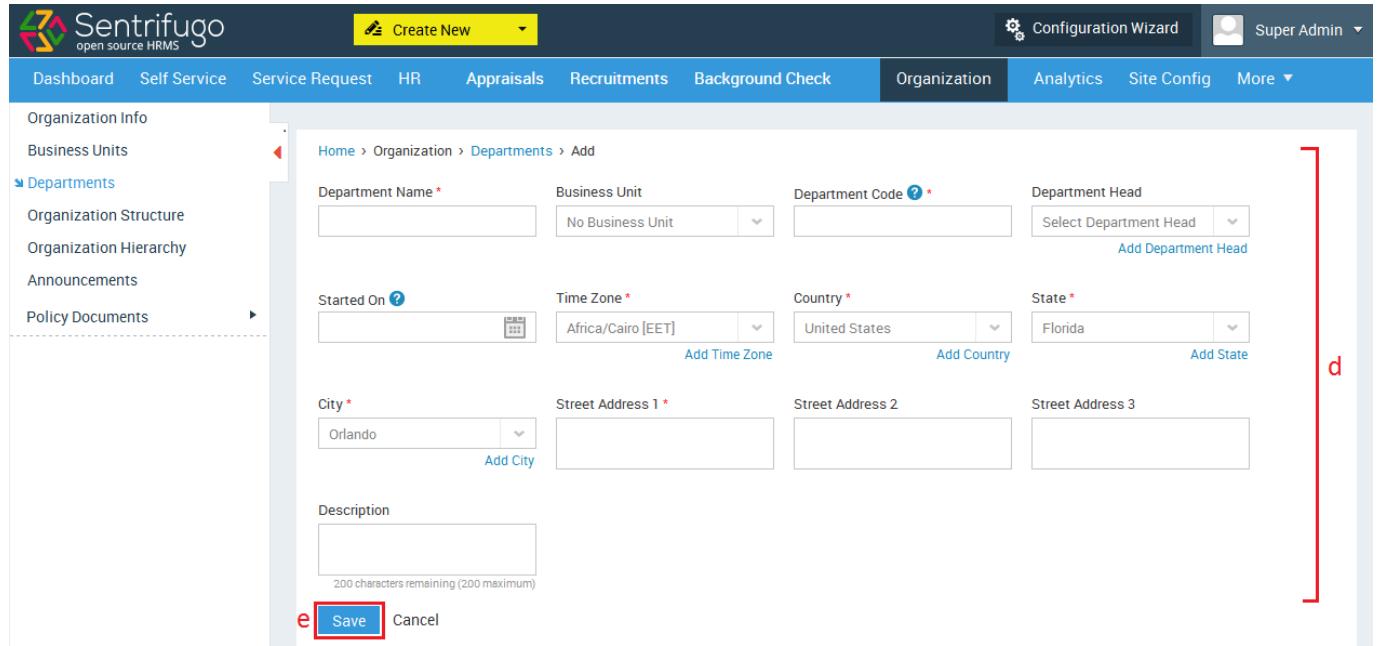


The screenshot shows the Sentrifugo application interface for managing Departments. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization (highlighted in red), Analytics, Site Config, and More. On the left, a sidebar lists Organization Info, Business Units, Departments (highlighted in red), Organization Structure, Organization Hierarchy, Announcements, and Policy Documents. The main content area displays a table titled 'Departments' with columns for Action, Name, Code, Started On, Department Head, Time Zone, and Business Unit. A single row is shown for 'Information Technology' with values ITD, Anderson Neo, America/New_York [EDT], and Orange Blossom. Buttons for Pin to shortcuts, +Add, and search are also present. A red box labeled 'a' highlights the 'Organization' tab, a red box labeled 'b' highlights the 'Departments' link, and a red box labeled 'c' highlights the '+Add' button.

Figure 16

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

Please refer Figure 17.



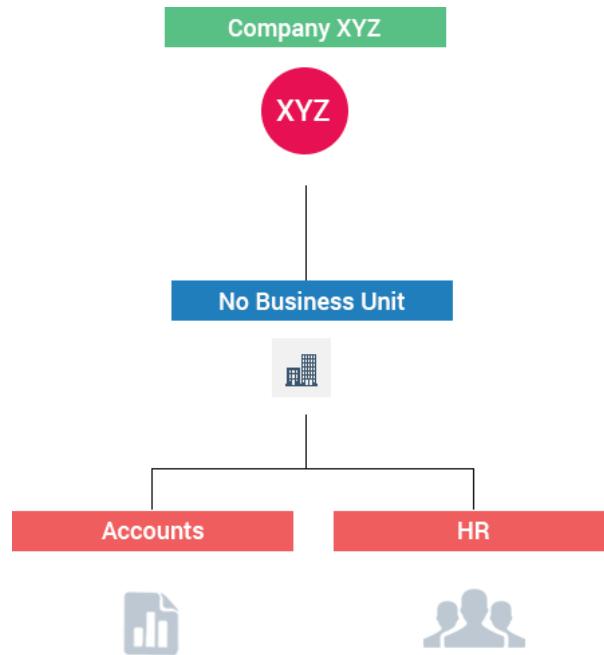
The screenshot shows the 'Organization' tab selected in the top navigation bar. On the left, a sidebar lists 'Organization Info', 'Business Units', 'Departments' (which is expanded), 'Organization Structure', 'Organization Hierarchy', 'Announcements', and 'Policy Documents'. The main content area shows a form for adding a department. The 'Department Name' field is empty. The 'Business Unit' dropdown is set to 'No Business Unit'. The 'Department Code' field is empty. The 'Department Head' dropdown is set to 'Select Department Head'. Below these are fields for 'Started On' (calendar icon), 'Time Zone' (set to 'Africa/Cairo [EET]'), 'Country' (set to 'United States'), and 'State' (set to 'Florida'). To the right of these are 'Add Time Zone', 'Add Country', and 'Add State' buttons. Below these are fields for 'City' (set to 'Orlando'), 'Street Address 1' (empty), 'Street Address 2' (empty), and 'Street Address 3' (empty). To the right of the city field are 'Add City', 'Add Street Address 1', 'Add Street Address 2', and 'Add Street Address 3' buttons. A 'Description' text area is present with a character limit of 200. At the bottom are 'Save' and 'Cancel' buttons, with 'Save' being highlighted by a red box and labeled 'e'. A red bracket labeled 'd' spans the 'Country', 'State', and 'Address' sections.

Figure 17

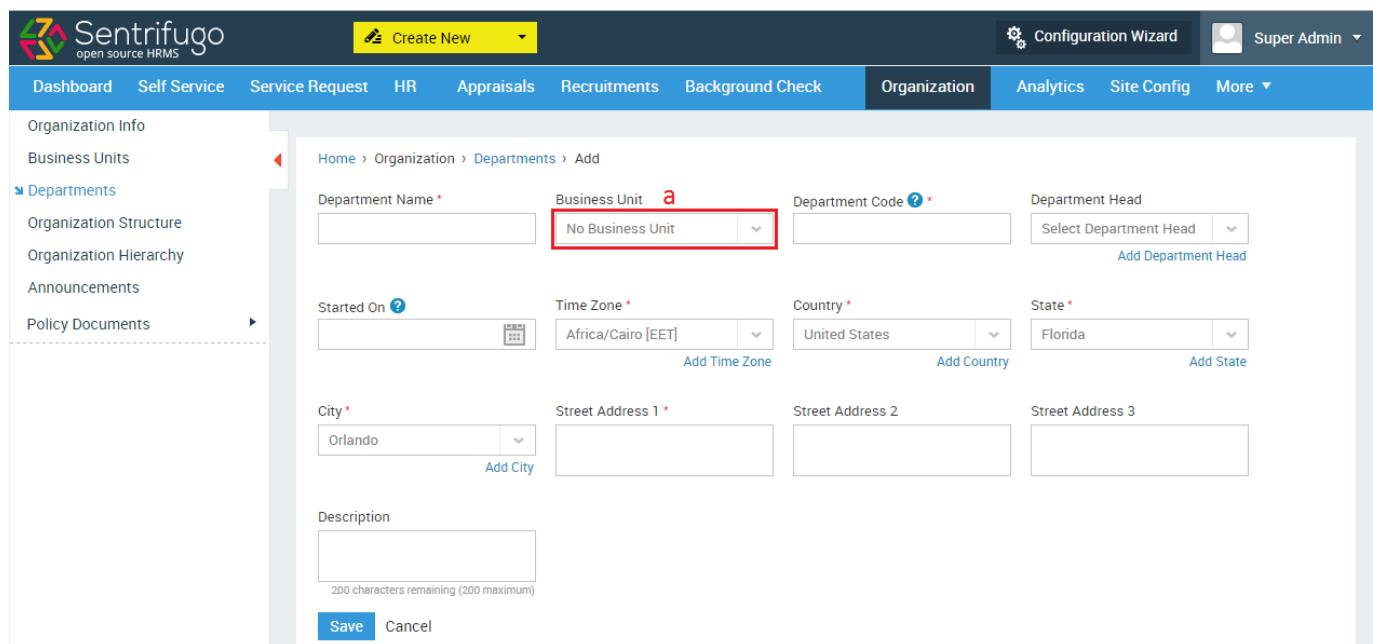
- d. Enter the necessary details
- e. Click **Save** button to create a new department

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. The 'Add' button is highlighted. The 'Business Unit' dropdown is set to 'No Business Unit', which is highlighted with a red box. Other fields include 'Department Name' (empty), 'Department Code' (empty), 'Department Head' (empty), 'Started On' (empty), 'Time Zone' (set to 'Africa/Cairo [EET]'), 'Country' (set to 'United States'), 'State' (set to 'Florida'), 'City' (set to 'Orlando'), 'Street Address 1' (empty), 'Street Address 2' (empty), 'Street Address 3' (empty), and a 'Description' text area (empty). Buttons at the bottom are 'Save' and 'Cancel'.

Figure 18

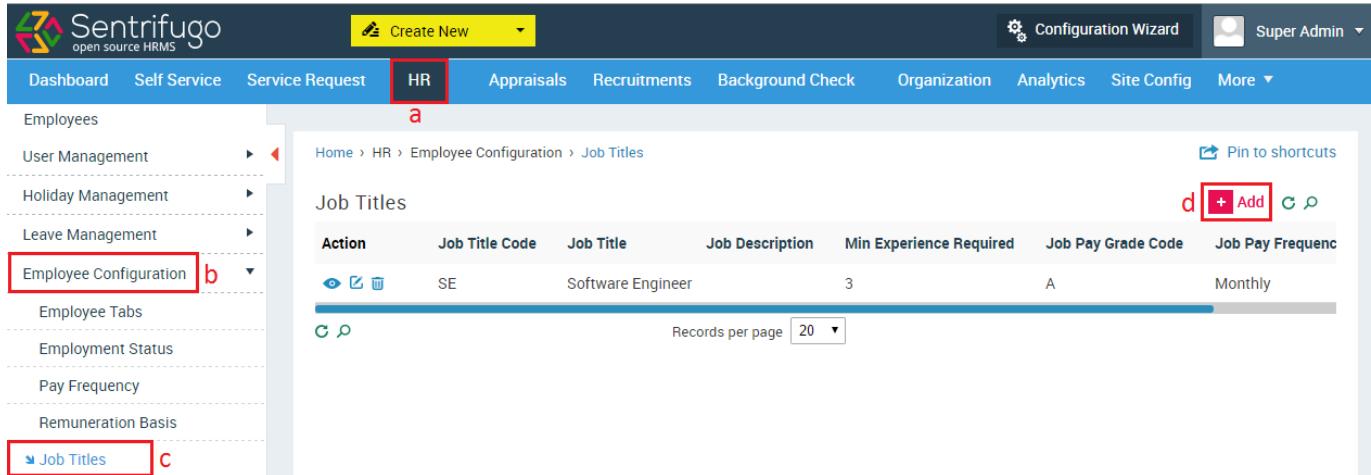
a. Select the option 'No Business Unit'

1.6 How do I add Job Titles and Positions?

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

1.6.1 Adding Job Titles

Please refer Figure 19.



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

Figure 19

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

Please refer Figure 20.

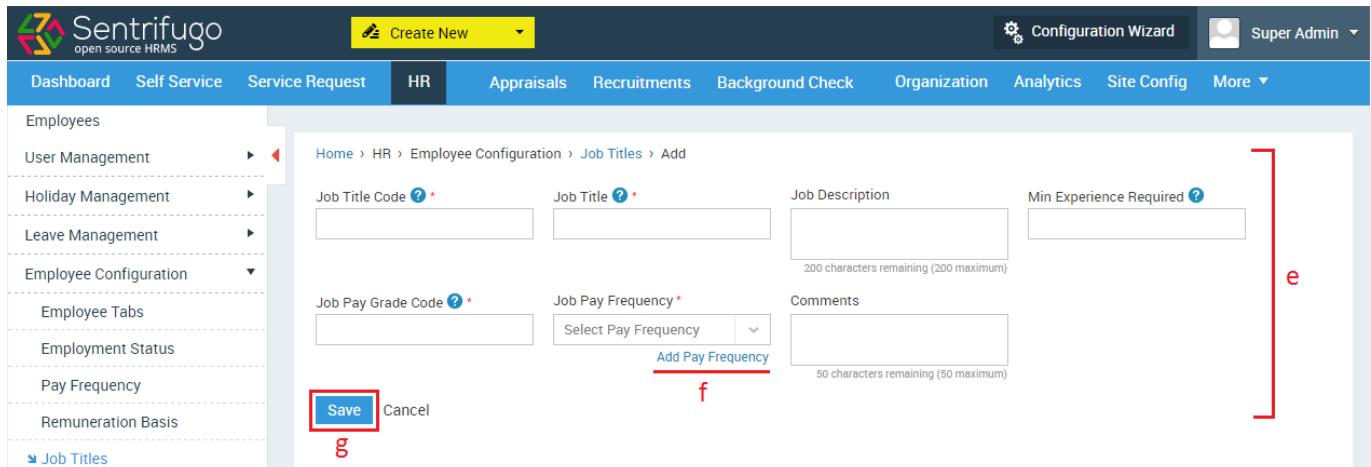
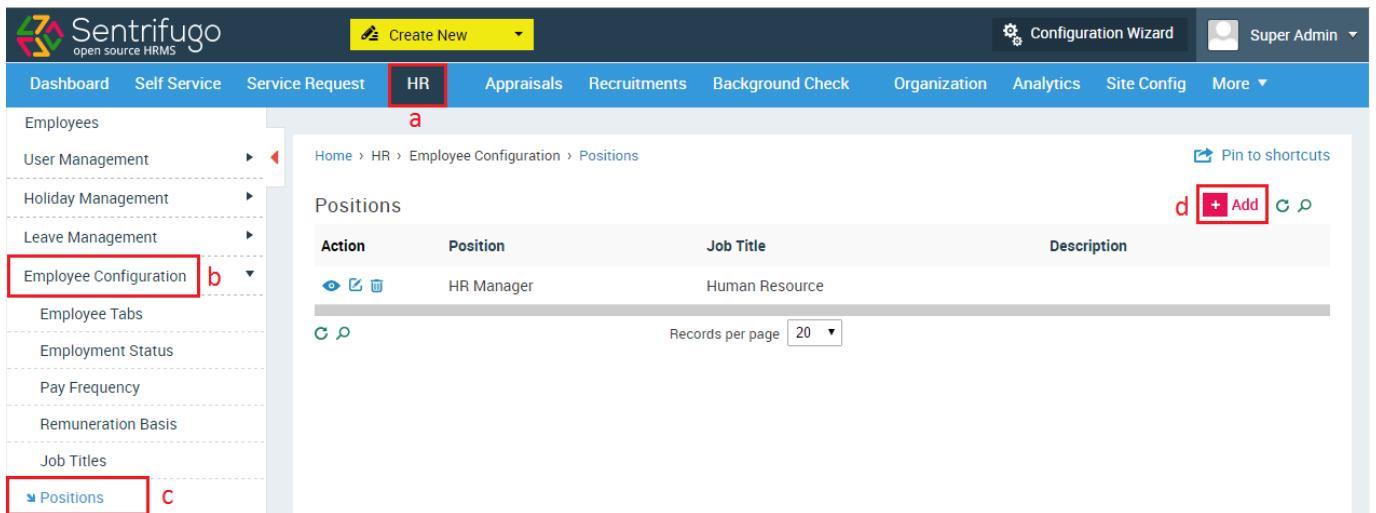


Figure 20

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

1.6.2 Adding Positions

Please refer Figure 21.

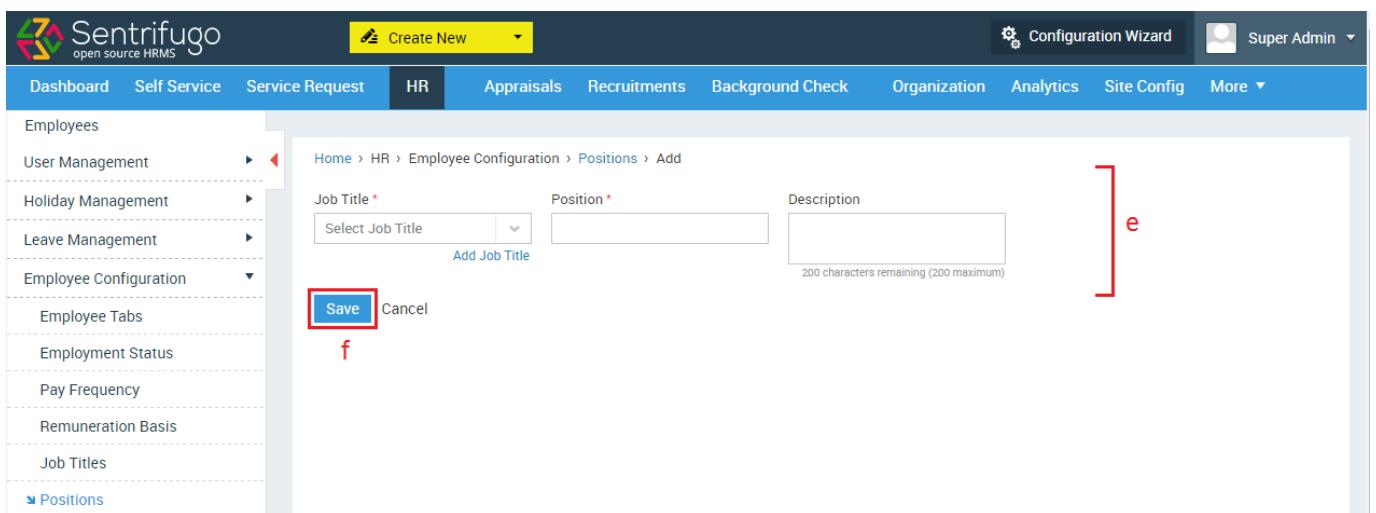


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has items like Dashboard, Self Service, Service Request, HR (highlighted with a red box 'a'), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The left sidebar under 'Employee Configuration' has options like User Management, Holiday Management, Leave Management, Employee Tabs, Employment Status, Pay Frequency, Remuneration Basis, Job Titles, and Positions (selected, highlighted with a red box 'b'). A red box 'c' points to the 'Positions' link in the sidebar. The central content area shows a list of positions with columns for Action, Position, Job Title, and Description. A red box 'd' points to the '+Add' button. The URL in the browser is 'Home > HR > Employee Configuration > Positions'.

Figure 21

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

Please refer Figure 22.



The screenshot shows the 'Add Position' form. The top navigation bar and main menu are identical to Figure 21. The left sidebar shows 'Employee Configuration' expanded, with 'Positions' selected. The central form has fields for 'Job Title *' (with a red box 'e'), 'Position *' (with a red box 'f'), and 'Description' (with a red bracket 'e' covering it). Below the form are 'Add Job Title' and 'Cancel' buttons. The URL in the browser is 'Home > HR > Employee Configuration > Positions > Add'.

Figure 22

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



You can create a Position only after creating a Job Title

2. Dashboard

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

2.1 How do I add Widgets?

Please refer Figure 23.

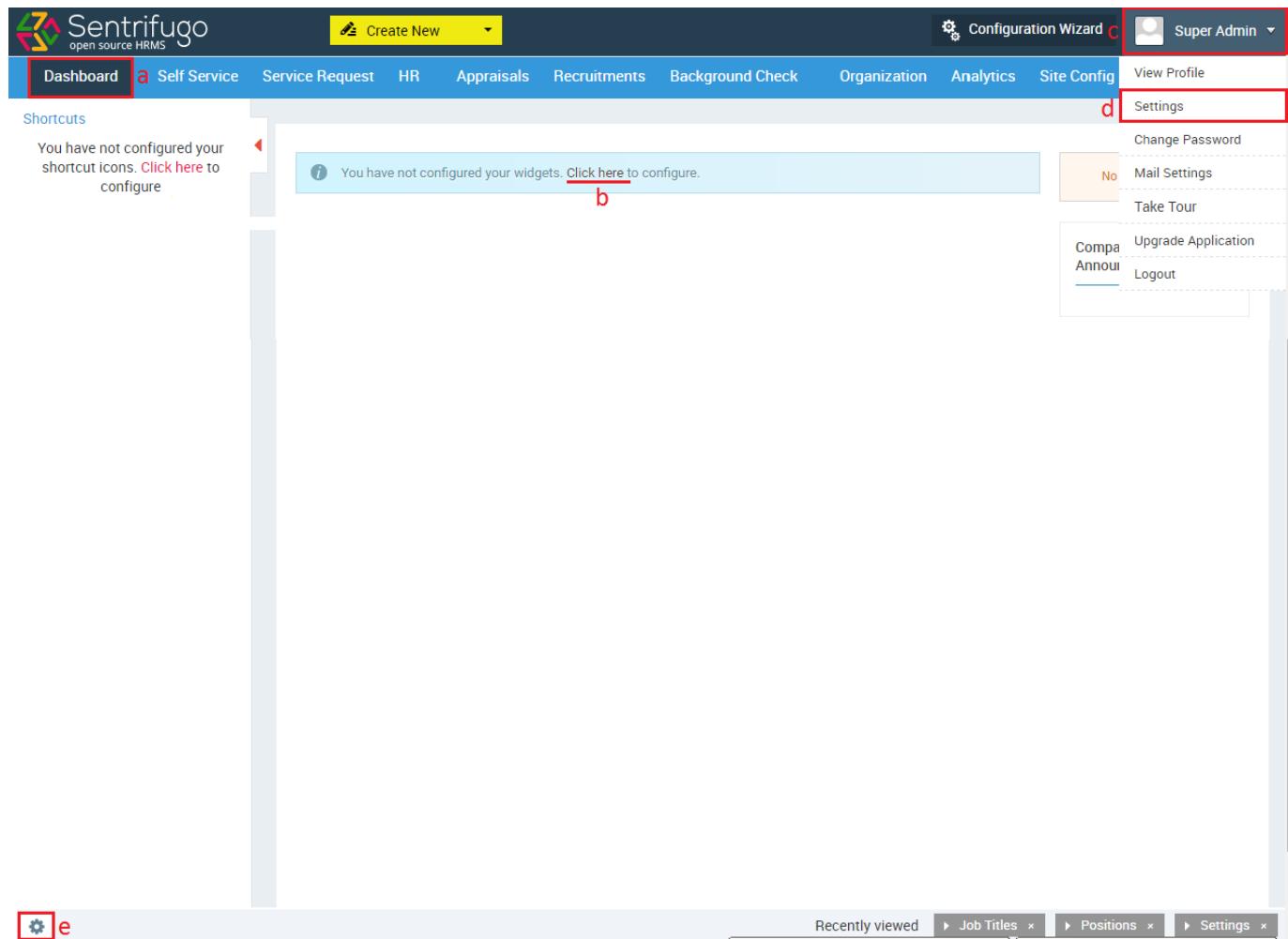


Figure 23

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

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

Or

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

Or

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

Please refer Figure 24.

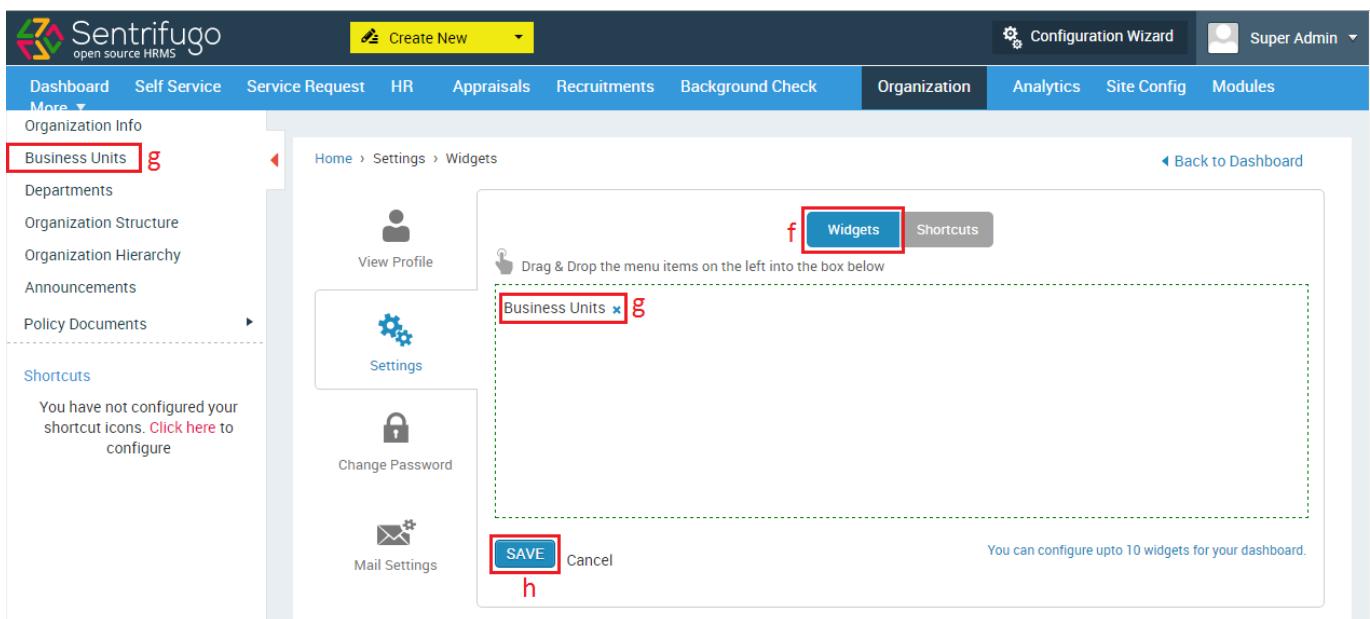


Figure 24

(Common for all)

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

2.2 How do I add Shortcuts?

Please refer Figure 25.

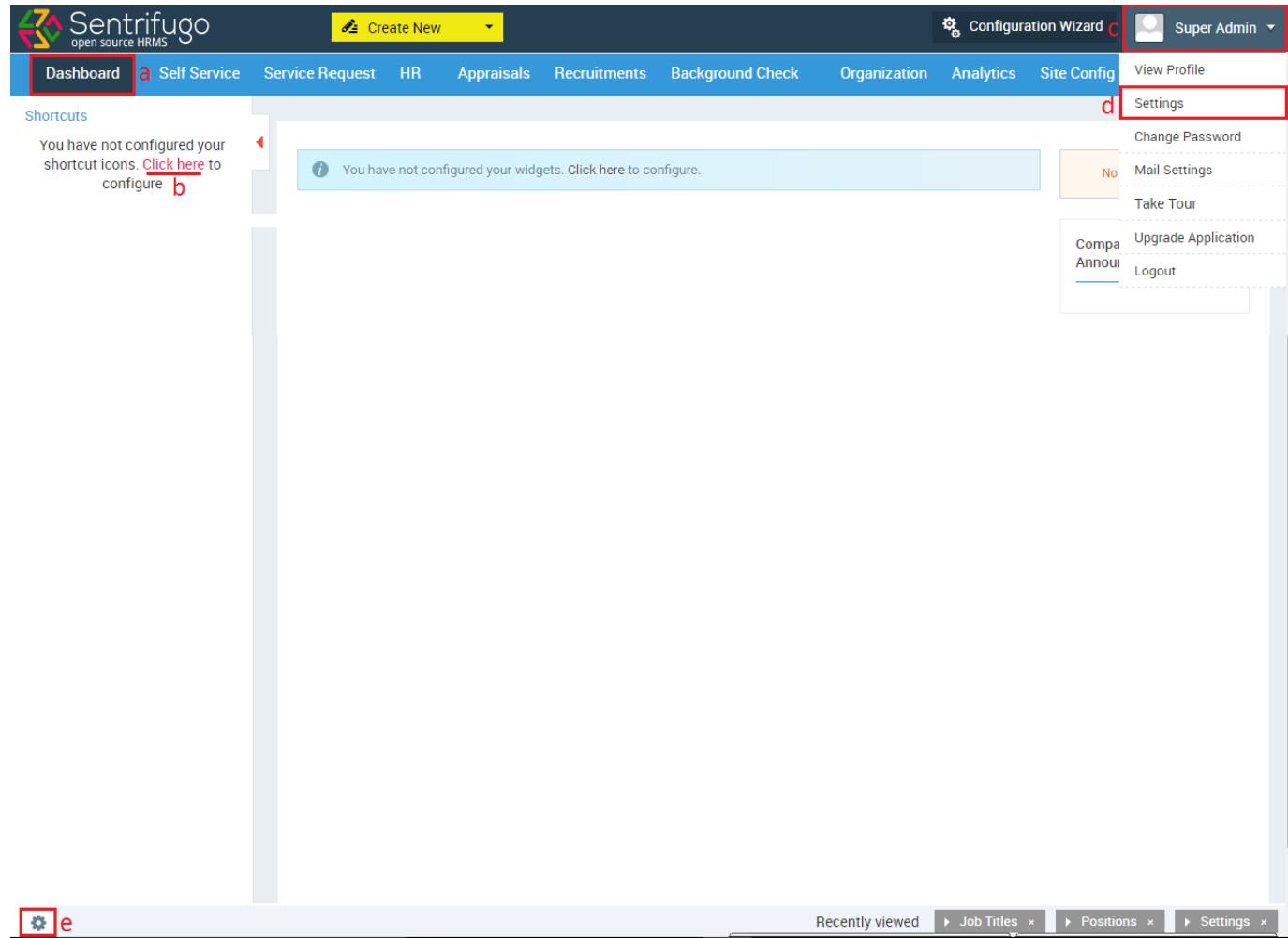


Figure 25

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

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

Please refer Figure 26.

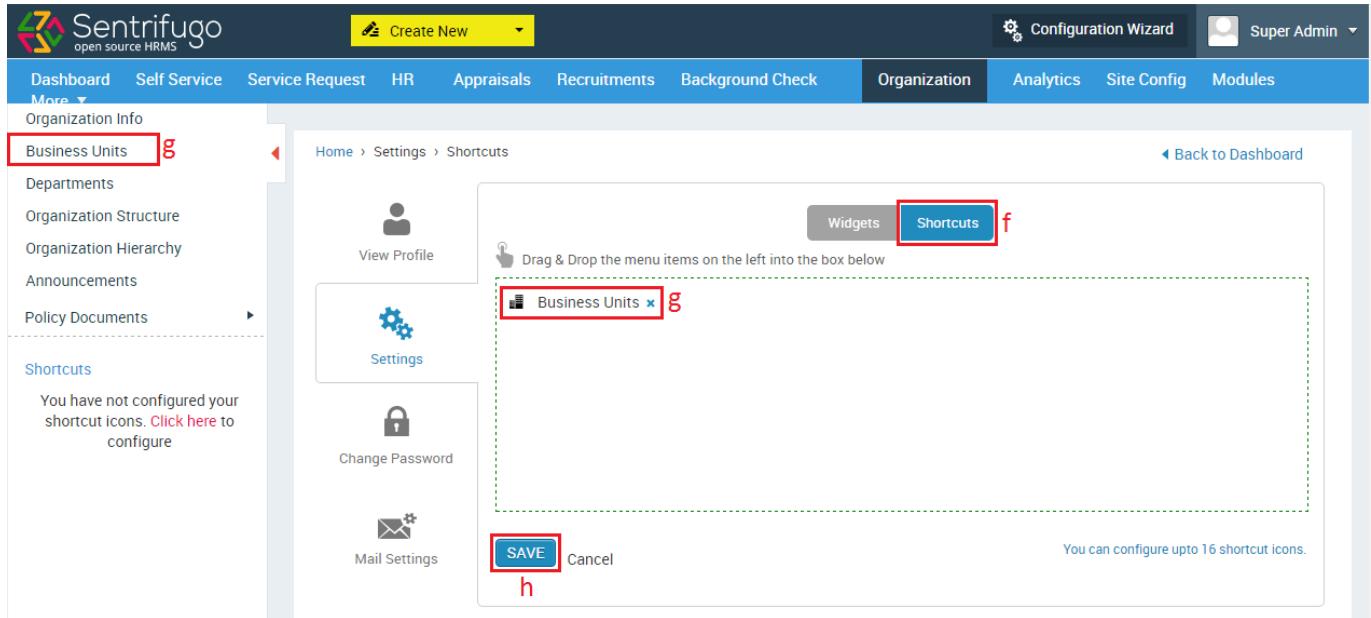


Figure 26

(Common for all)

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

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

Create New Configuration Wizard Super Admin

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

Shortcuts



4
Openings/Positions

Approved
1
Rejected
1

[View All](#)

2
Screening Types

[View All](#)

2
Agencies

[View All](#)

No birthdays today.

Company Announcements

Announcements
Sat, Sep 17

Roles & Privileges 7

- Employees (2)
- HR (1)
- Management (1)
- External Users (1)
- Manager (1)

[View All](#)

Manage Holiday Group 1

New Group (1)

[View All](#)

Manage Holidays 1

20.09.2016 (Diwali)

[View All](#)

Categories 4

- System Administration
- Accounts
- Software
- Hardware

[View All](#)

Appraisal Questions 5

- What is Validation?
- What is Verification?
- What is Walkthrough?
- What is Agile Model?
- What is Inspection?

[View All](#)

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

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2.3 How do I add Announcements?

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

Please refer Figure 27

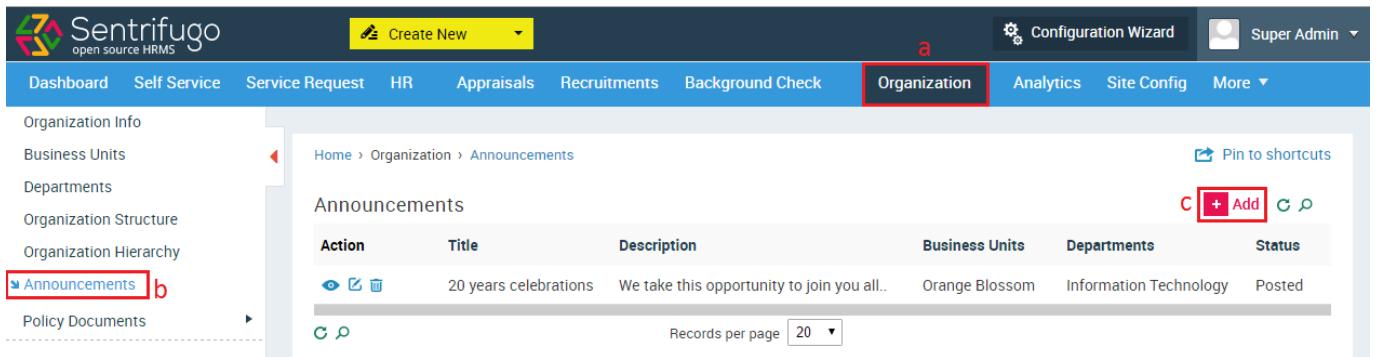
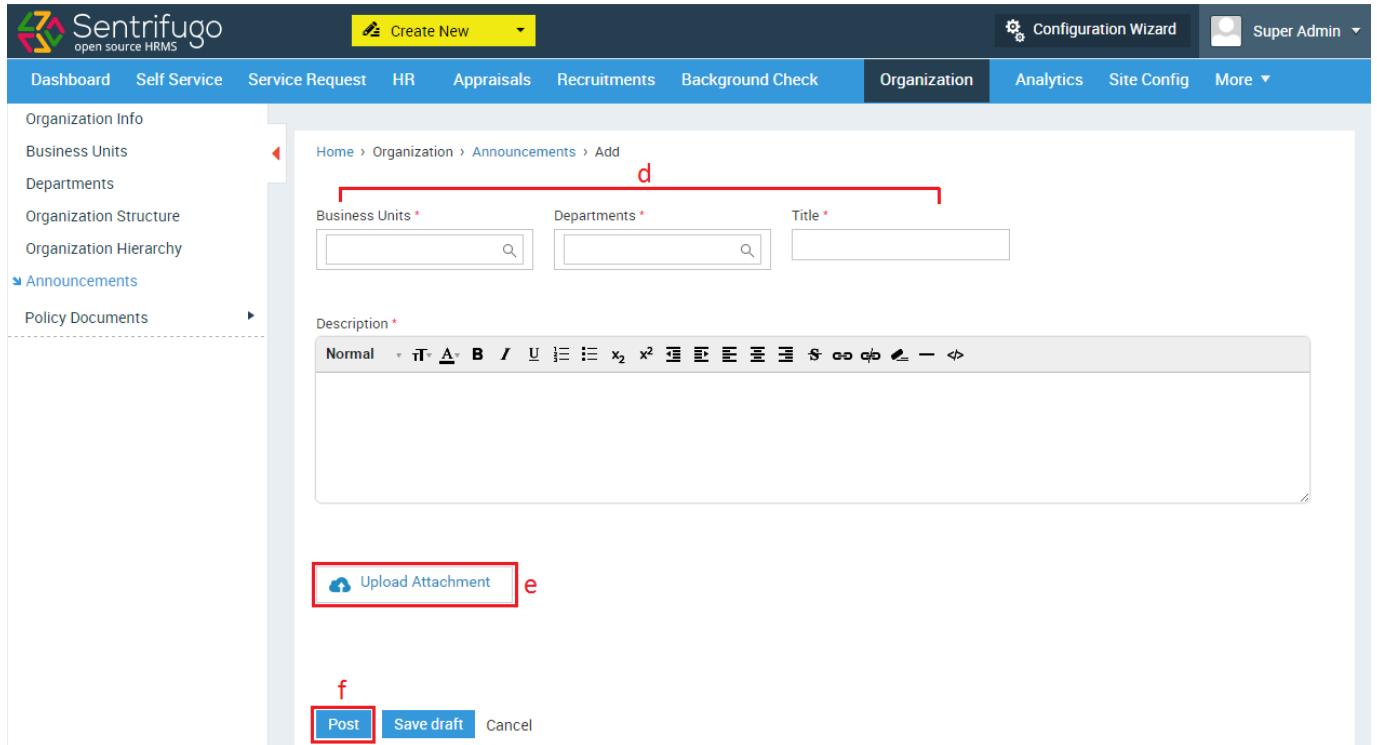


Figure 27

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

Please refer Figure 28.



The screenshot shows the 'Announcements' section of the Sentrifugo HRMS. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu on the left lists 'Organization Info', 'Business Units', 'Departments', 'Organization Structure', 'Organization Hierarchy', 'Announcements' (which is selected), and 'Policy Documents'. The 'Announcements' sub-menu has a red arrow pointing to it. The central workspace shows a breadcrumb path 'Home > Organization > Announcements > Add'. It contains fields for 'Business Units', 'Departments', and 'Title', each with a search icon. Below these is a rich text editor toolbar. A large text area for 'Description' is present. At the bottom are buttons for 'Upload Attachment' (highlighted with a red box 'e'), 'Post' (highlighted with a red box 'f'), 'Save draft', and 'Cancel'.

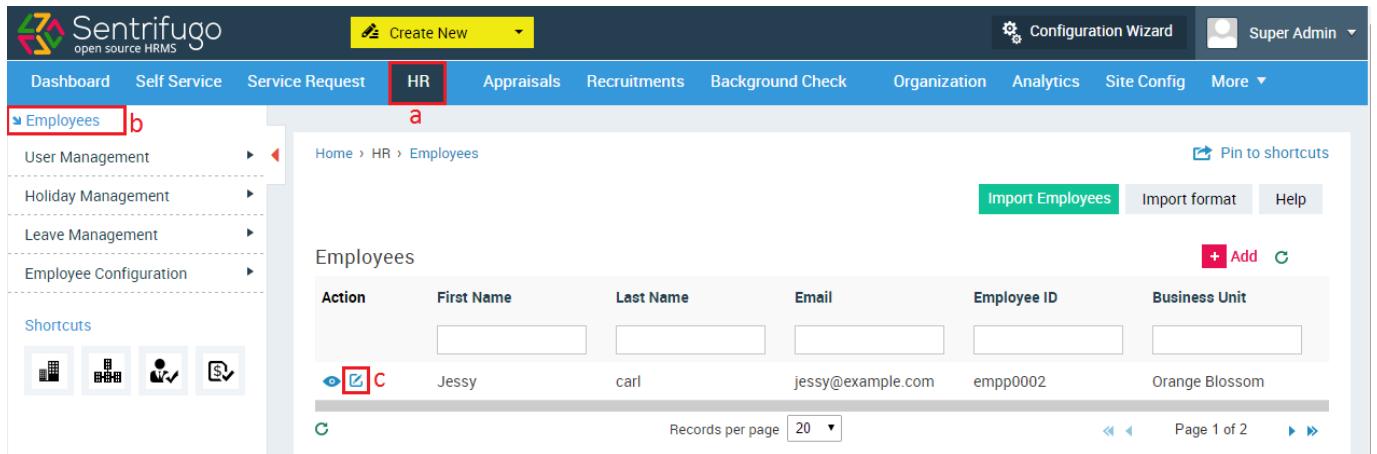
Figure 28

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

2.4 How do I add Birthday Announcements?

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

Please refer Figure 29.



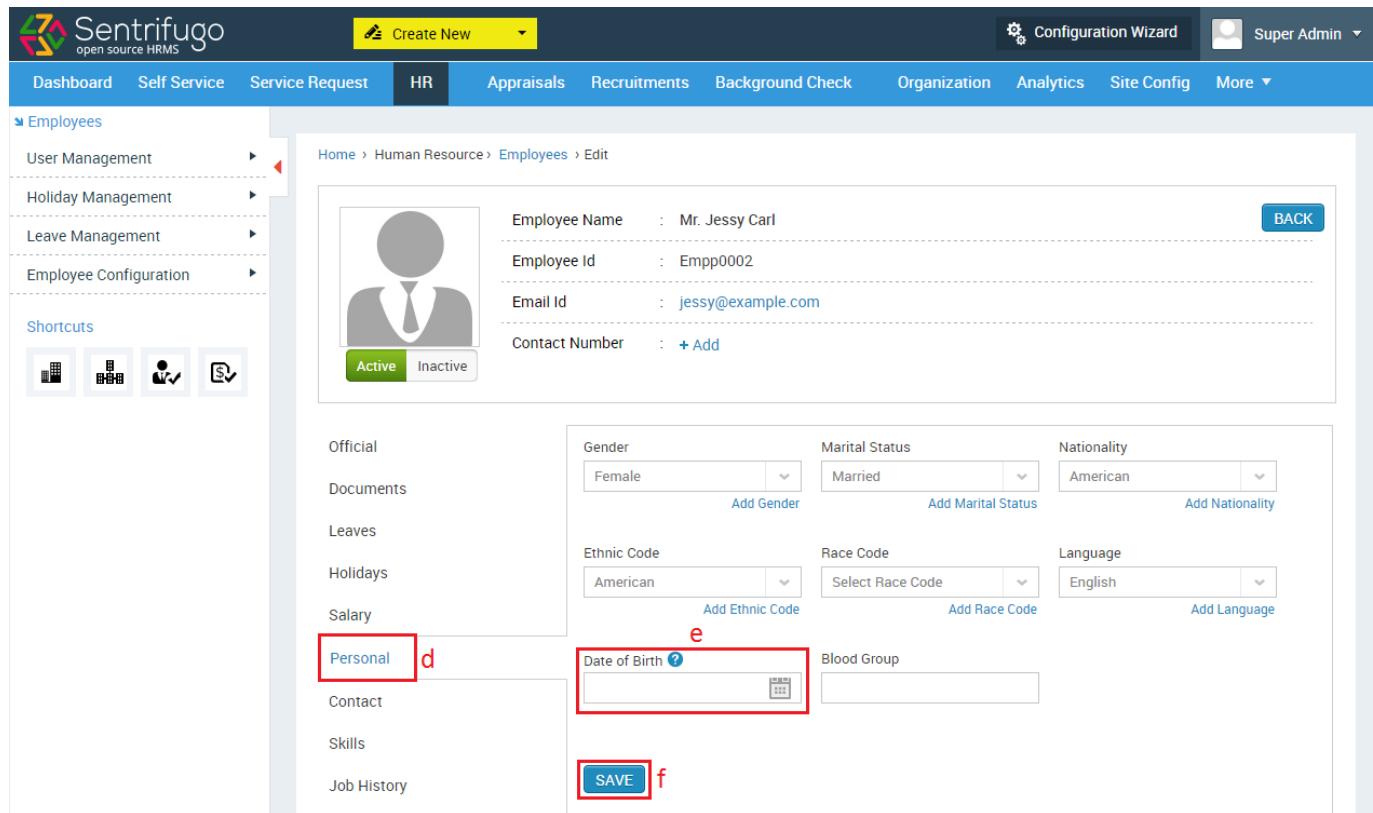
The screenshot shows the 'Employees' section of the Sentrifugo HRMS. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu on the left lists 'Dashboard', 'Self Service', 'Service Request', 'HR' (which is selected and highlighted with a red box 'a'), 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The sidebar on the left has a red box 'b' around the 'Employees' link under 'User Management'. The central workspace shows a breadcrumb path 'Home > HR > Employees'. It includes buttons for 'Import Employees', 'Import format', and 'Help'. A table titled 'Employees' lists columns for Action, First Name, Last Name, Email, Employee ID, and Business Unit. A new row is being added, indicated by a red box 'c' around the 'Add' button. The table footer shows 'Records per page' set to 20 and 'Page 1 of 2'.

Figure 29

To add an employee's birthday:

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

Please refer Figure 30.



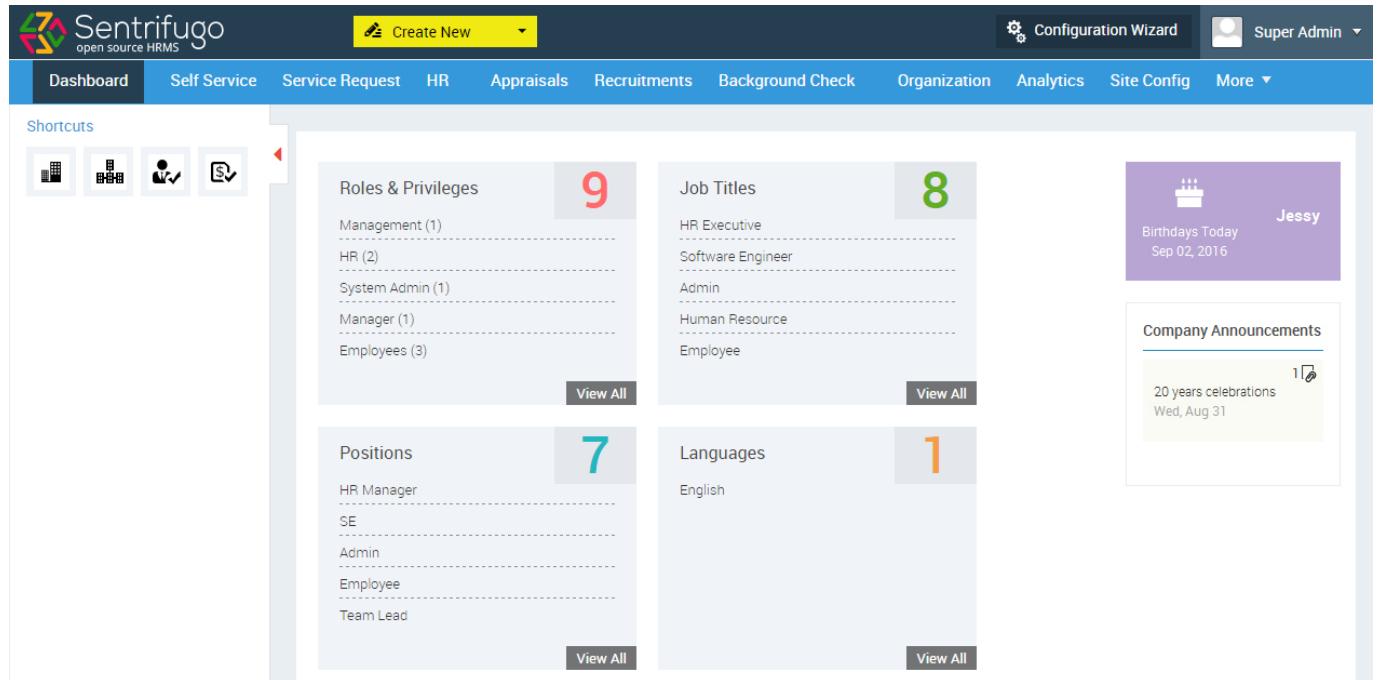
The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes 'Create New', 'Configuration Wizard', 'Super Admin', and links for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The left sidebar under 'Employees' has options for User Management, Holiday Management, Leave Management, Employee Configuration, and Shortcuts. The main content area shows an employee profile for 'Mr. Jessy Carl' with details: Employee Name (Mr. Jessy Carl), Employee Id (Empp0002), Email Id (jessy@example.com), and Contact Number (+ Add). Below this, there are sections for Official, Documents, Leaves, Holidays, Salary, and Personal. The 'Personal' section is highlighted with a red box and labeled 'd'. It contains fields for Gender (Female), Marital Status (Married), Nationality (American), Ethnic Code (American), Race Code (Select Race Code), Language (English), Date of Birth (input field), and Blood Group (input field). The 'Date of Birth' field is highlighted with a red box and labeled 'e'. The 'SAVE' button at the bottom is highlighted with a red box and labeled 'f'.

Figure 30

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

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

Please refer Figure 31.



The screenshot shows the Sentrifugo open source HRMS dashboard. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the far right of the top bar are 'Configuration Wizard' and 'Super Admin' dropdown menus. Below the navigation bar, there is a 'Shortcuts' section with four icons: a building, a person, a checkmark, and a document. The main content area is divided into several sections:

- Roles & Privileges**: Shows 9 items: Management (1), HR (2), System Admin (1), Manager (1), and Employees (3). A 'View All' button is at the bottom.
- Job Titles**: Shows 8 items: HR Executive, Software Engineer, Admin, Human Resource, and Employee. A 'View All' button is at the bottom.
- Positions**: Shows 7 items: HR Manager, SE, Admin, Employee, and Team Lead. A 'View All' button is at the bottom.
- Languages**: Shows 1 item: English. A 'View All' button is at the bottom.
- Birthdays Today**: A purple box for Jessy, showing 'Birthdays Today Sep 02, 2016'.
- Company Announcements**: A box showing '20 years celebrations Wed, Aug 31'.

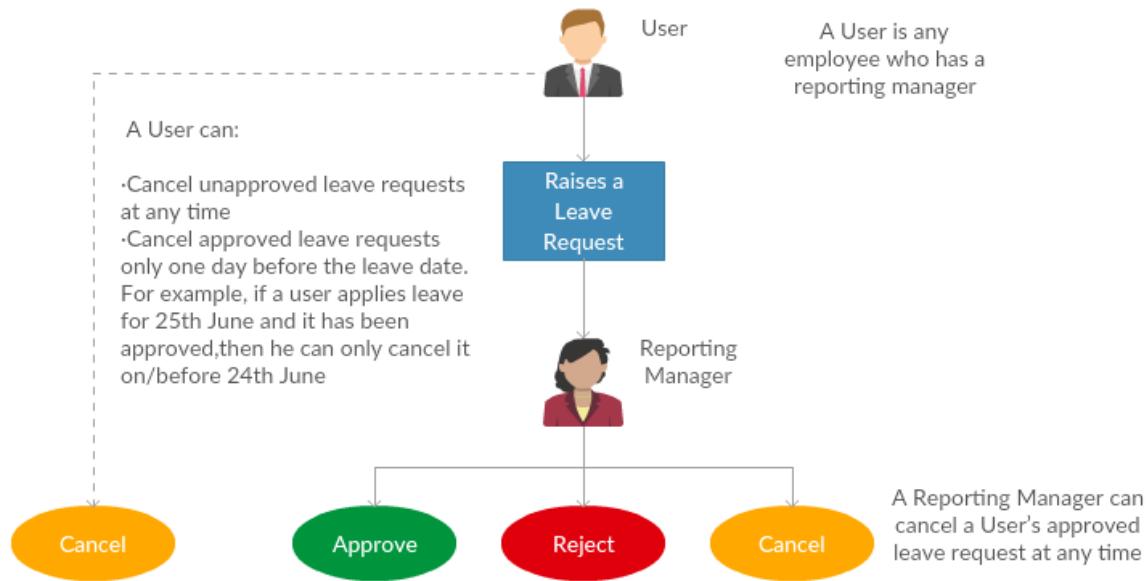
Figure 31



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.



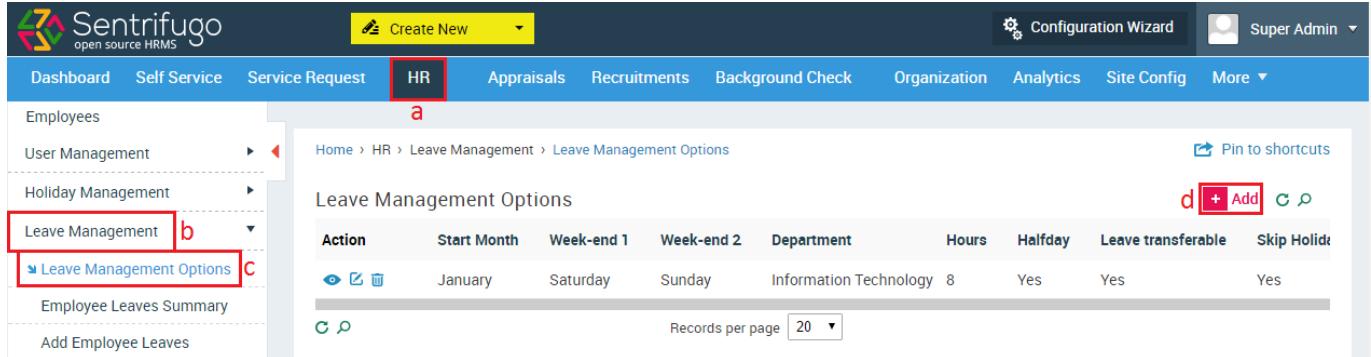
After an approved leave request has been cancelled, the leave(s) are credited back to the user's leave balance.

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.

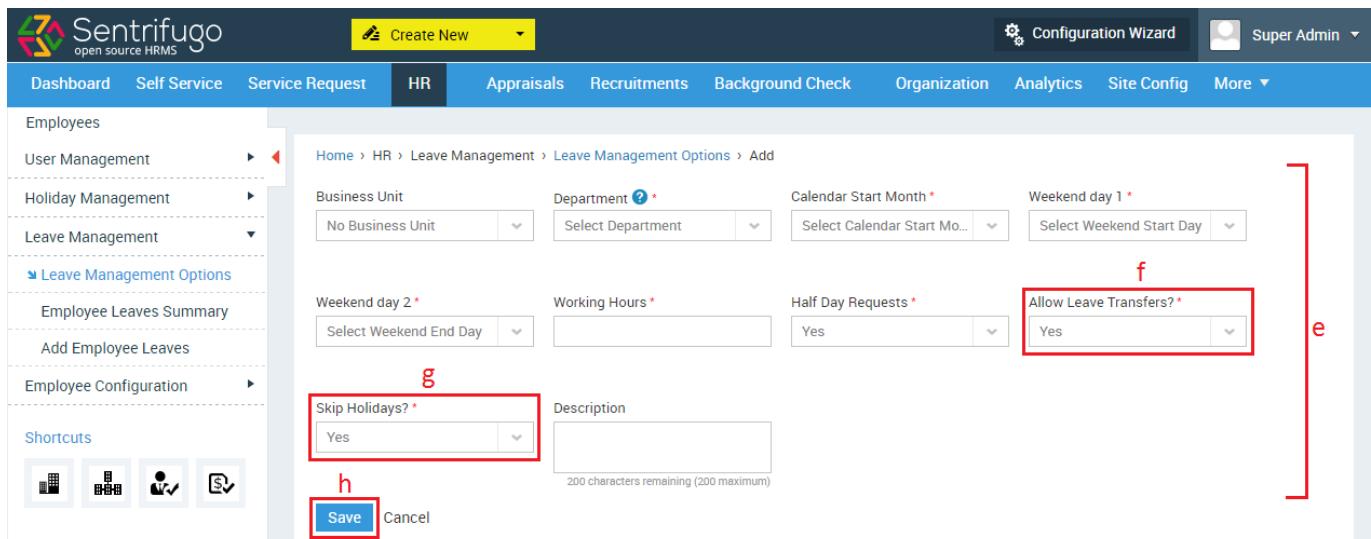


Figure 33

- Fill in the required details

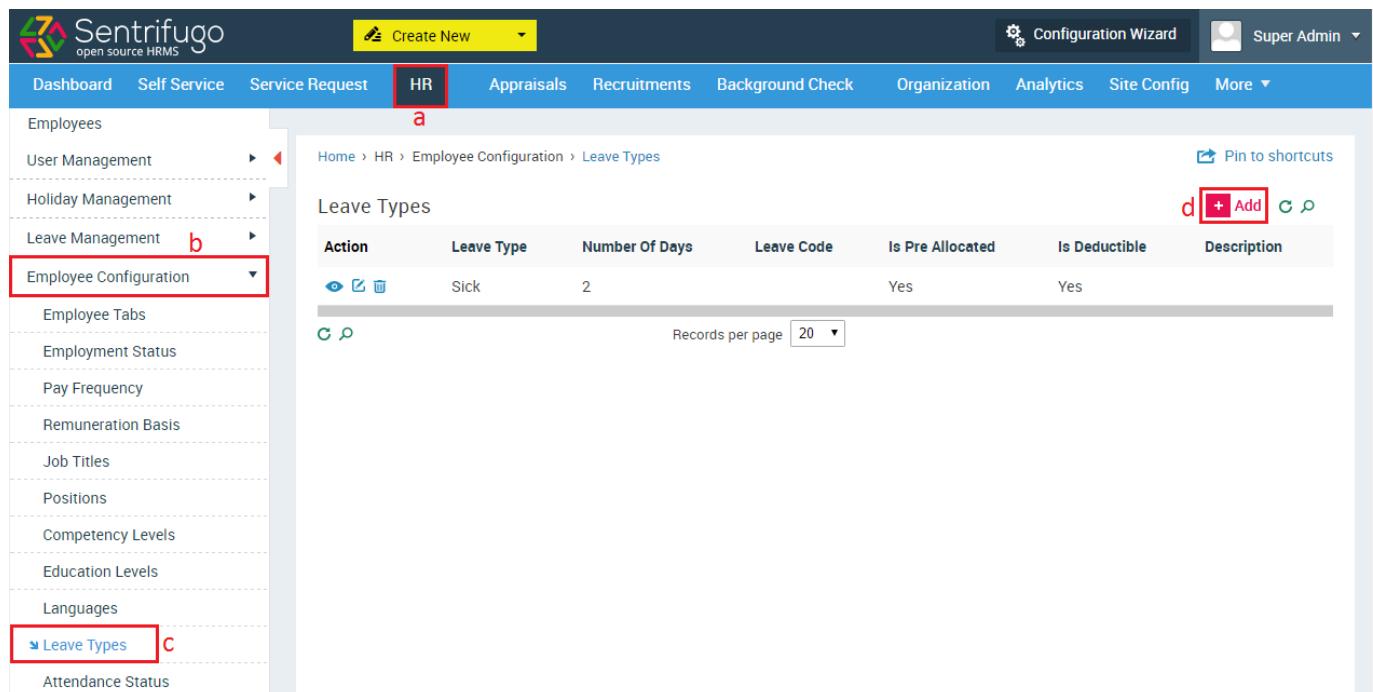
- f. **Allow Leave Transfers:** If there are any unused leaves for an employee in the current year, then by using this option they will be carried forward to the next year.
- g. **Skip Holidays:** If a user applies for a vacation which includes the weekend or any pre-declared holiday, then by using this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

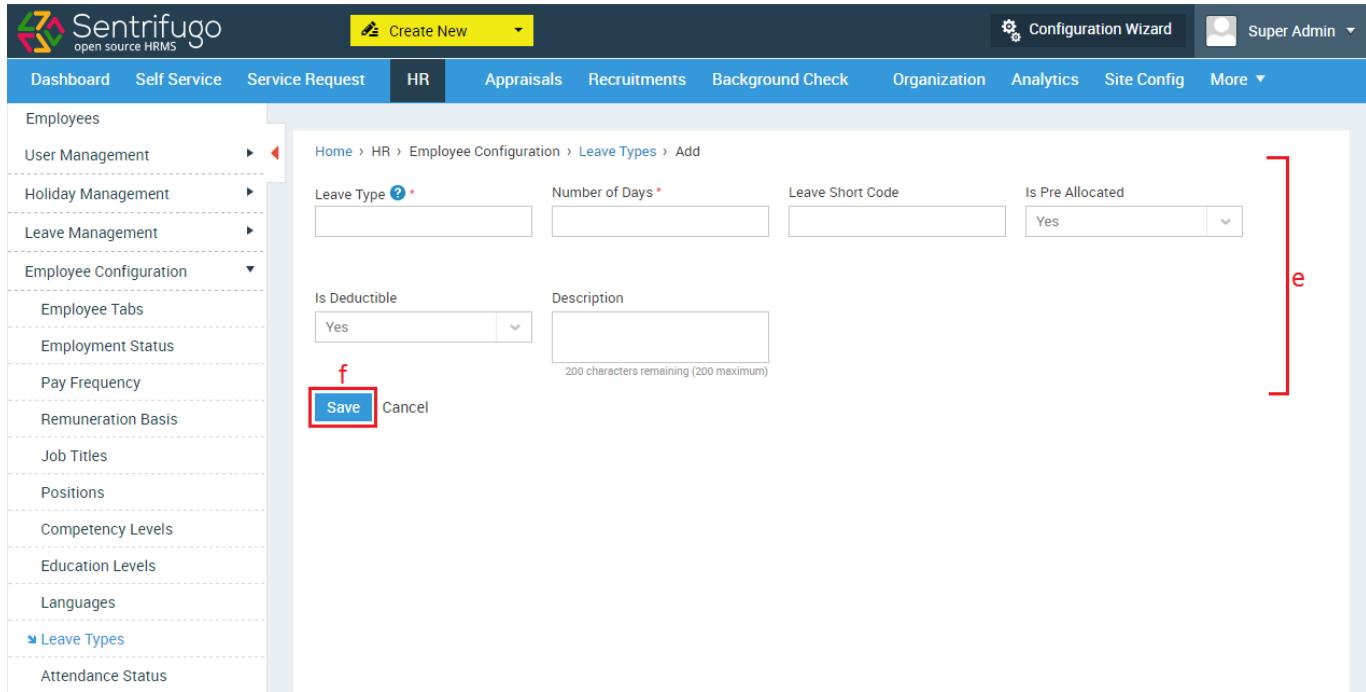


Action	Leave Type	Number Of Days	Leave Code	Is Pre Allocated	Is Deductible	Description
	Sick	2		Yes	Yes	

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 HRM system's interface for managing leave types. On the left, there's a sidebar with various employee-related categories like User Management, Holiday Management, Leave Management, and Employee Configuration. The main area is titled 'Leave Types' and has fields for 'Leave Type', 'Number of Days', 'Leave Short Code', and 'Is Pre Allocated' (which is set to 'Yes'). Below these are fields for 'Is Deductible' (set to 'Yes') and 'Description'. A red bracket labeled 'e' points to the 'Is Pre Allocated' and 'Is Deductible' fields. A red box labeled 'f' surrounds the 'Save' button. The bottom right corner of the main area has a note: '200 characters remaining (200 maximum)'.

Figure 35

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



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

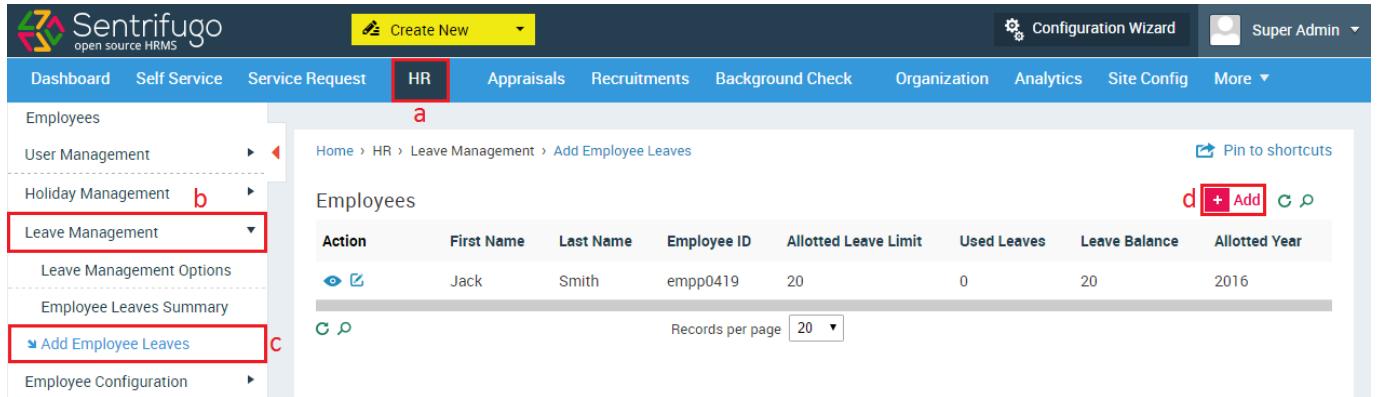
3.3 How do I allocate Leave to Employees?

There are two ways to allocate leaves to employees:

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

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

Please refer Figure 36

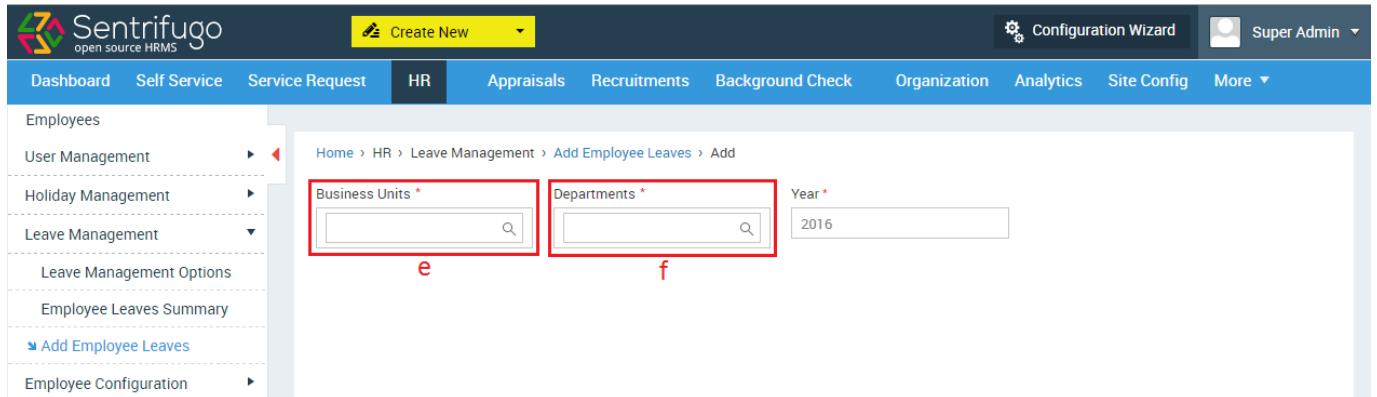


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has 'Dashboard', 'Self Service', 'Service Request', 'HR' (highlighted with a red box), 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar has 'Employees', 'User Management', 'Holiday Management' (highlighted with a red box), 'Leave Management' (highlighted with a red box), 'Leave Management Options', 'Employee Leaves Summary', 'Add Employee Leaves' (highlighted with a red box), and 'Employee Configuration'. The right panel shows a table titled 'Employees' with columns: Action, First Name, Last Name, Employee ID, Allotted Leave Limit, Used Leaves, Leave Balance, and Allotted Year. A single row is displayed for 'Jack Smith' with ID 'empp0419'. The bottom right of the table has '+ Add' and search icons. The URL in the browser is 'Home > HR > Leave Management > Add Employee Leaves'.

Figure 36

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

Please refer Figure 37



The screenshot shows the same interface as Figure 36, but with additional filters applied. The 'Business Units' and 'Departments' dropdowns are highlighted with red boxes and have search icons. The 'Year' field is set to '2016'. The URL in the browser is 'Home > HR > Leave Management > Add Employee Leaves > Add'.

Figure 37

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

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

Please refer Figure 38

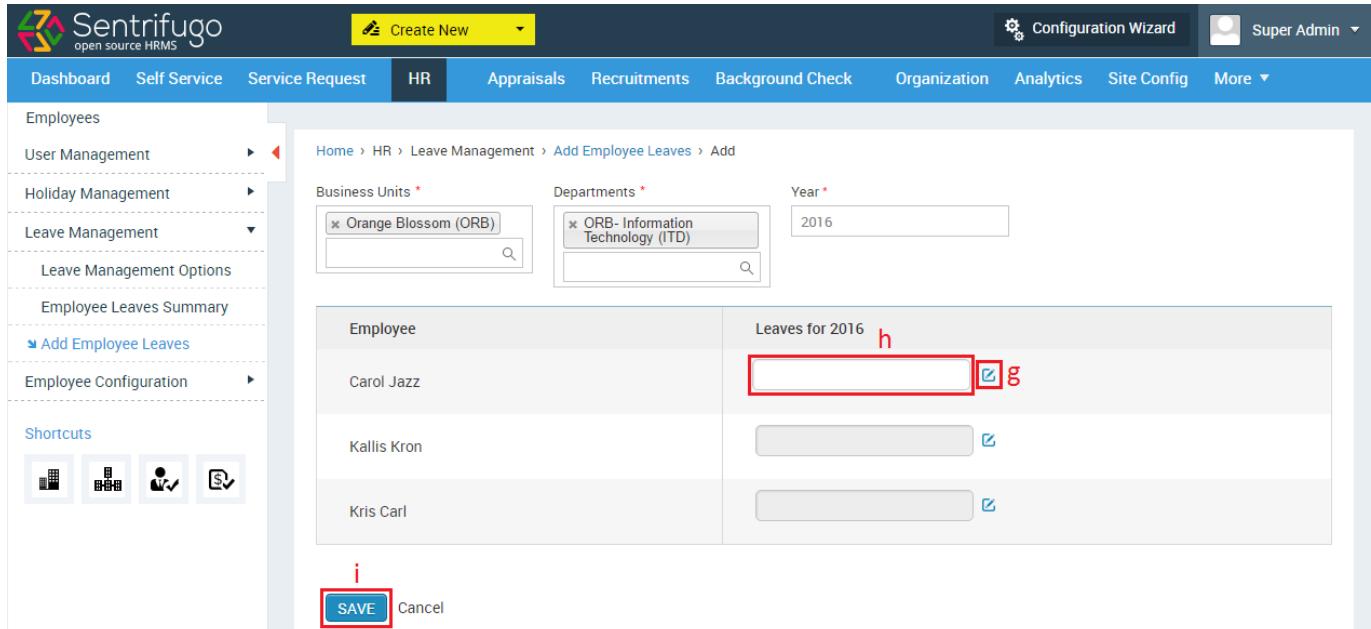


Figure 38

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

One employee at a time

Please refer Figure 39

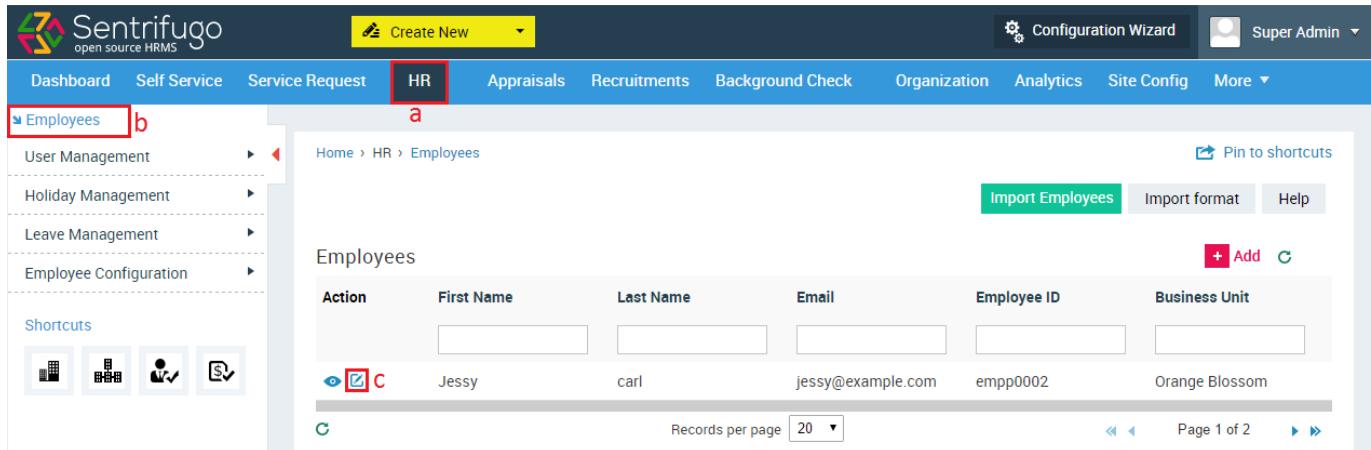
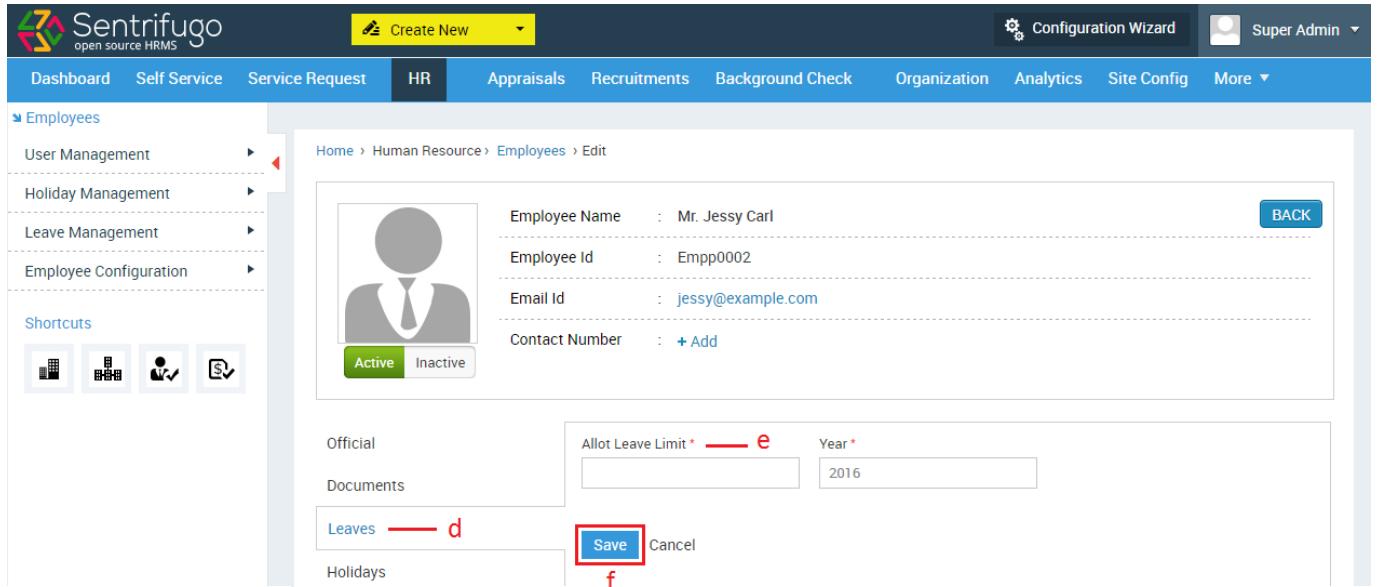


Figure 39

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

Please refer Figure 40



The screenshot shows the Sentrifugo HR module's Employee management screen. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has 'Dashboard', 'Self Service', 'Service Request', 'HR' (selected), 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. On the left, a sidebar for 'Employees' lists 'User Management', 'Holiday Management', 'Leave Management', 'Employee Configuration', and 'Shortcuts' with icons for building, users, and documents. The main content area shows an employee profile for 'Mr. Jessy Carl' with details like Employee Name, Employee ID, Email ID, and Contact Number. Below this, there are sections for 'Official', 'Documents', and 'Leaves'. The 'Leaves' section is highlighted with a red box 'd'. It contains fields for 'Allot Leave Limit *' (with a red box 'e') and 'Year *' (set to '2016'). At the bottom of this section are 'Save' and 'Cancel' buttons, also highlighted with a red box 'f'.

Figure 40

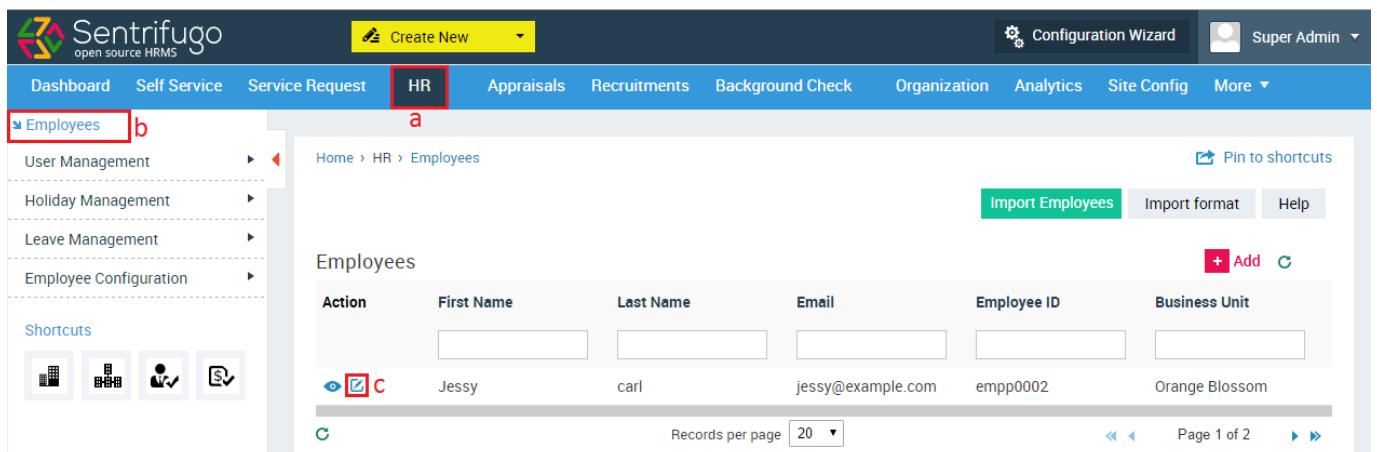
- d. Click **Leaves** on the left menu panel (left side of the form)
- e. Enter the number of days for this employee
- f. Click **SAVE** button



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

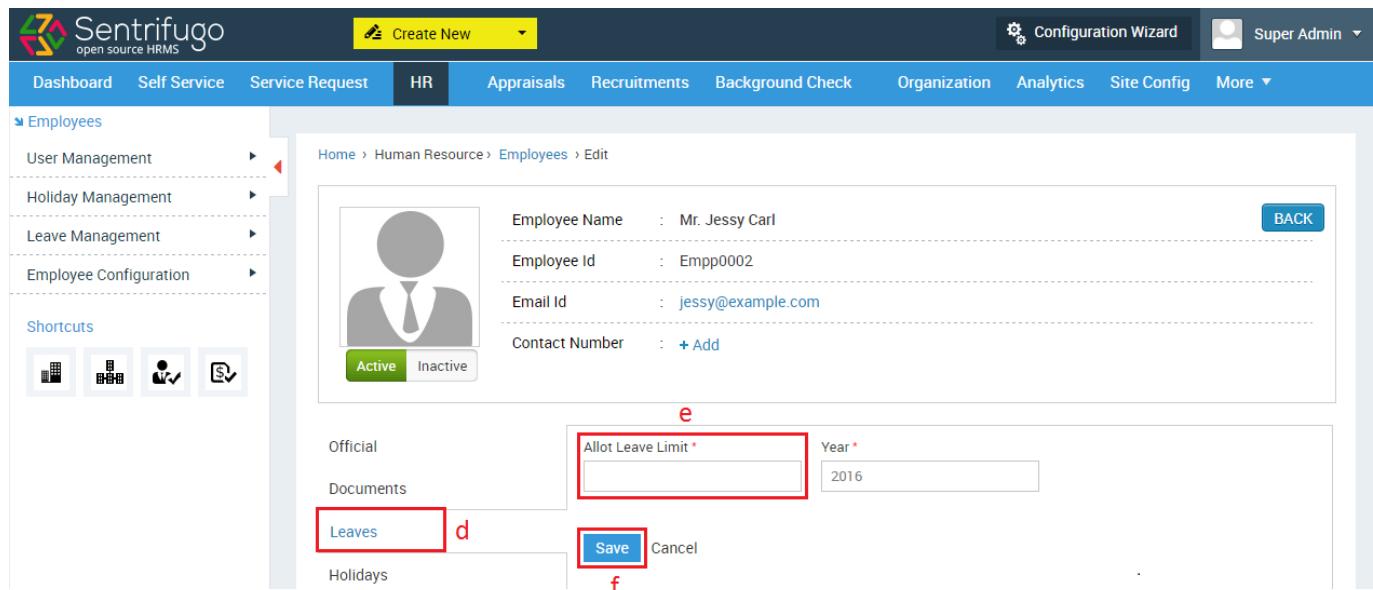


The screenshot shows the Sentrifugo HR module's Employee list screen. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has 'Dashboard', 'Self Service', 'Service Request', 'HR' (selected), 'Appraisals', 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. On the left, a sidebar for 'Employees' lists 'User Management', 'Holiday Management', 'Leave Management', 'Employee Configuration', and 'Shortcuts' with icons for building, users, and documents. The main content area shows a table titled 'Employees' with columns for Action, First Name, Last Name, Email, Employee ID, and Business Unit. A new employee 'Jessy' is listed with values 'carl', 'jessy@example.com', 'empp0002', and 'Orange Blossom'. The 'Leave Management' section is highlighted with a red box 'b'. The 'Leaves' button is at the top left of this section, and the 'Import Employees' and 'Import format' buttons are at the top right. The table itself is highlighted with a red box 'a'. The 'Edit' icon for the first row is highlighted with a red box 'c'.

Figure 41

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

Please refer Figure 42



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

Official
 Allot Leave Limit *
 Year *

Leaves d
 Holidays
 Save f Cancel

Figure 42

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



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

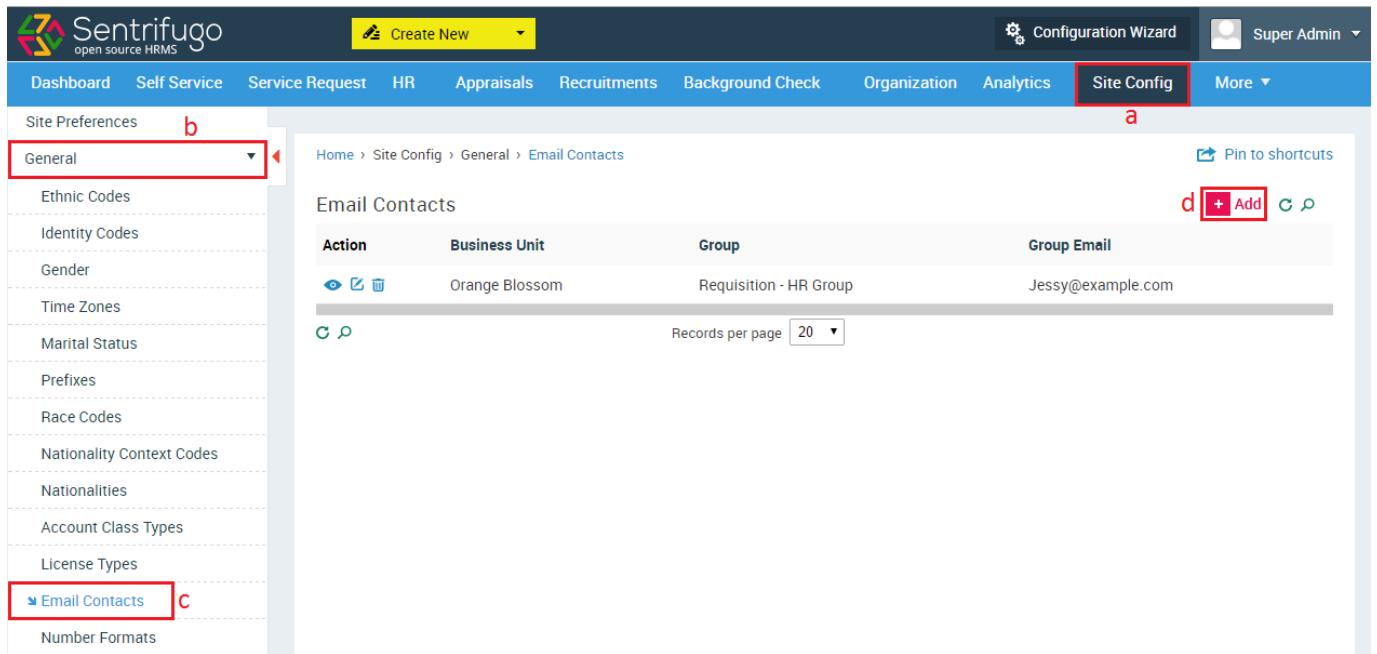
3.5 How do I create HR Email Group for Leave Management?

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



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

Please refer Figure 43

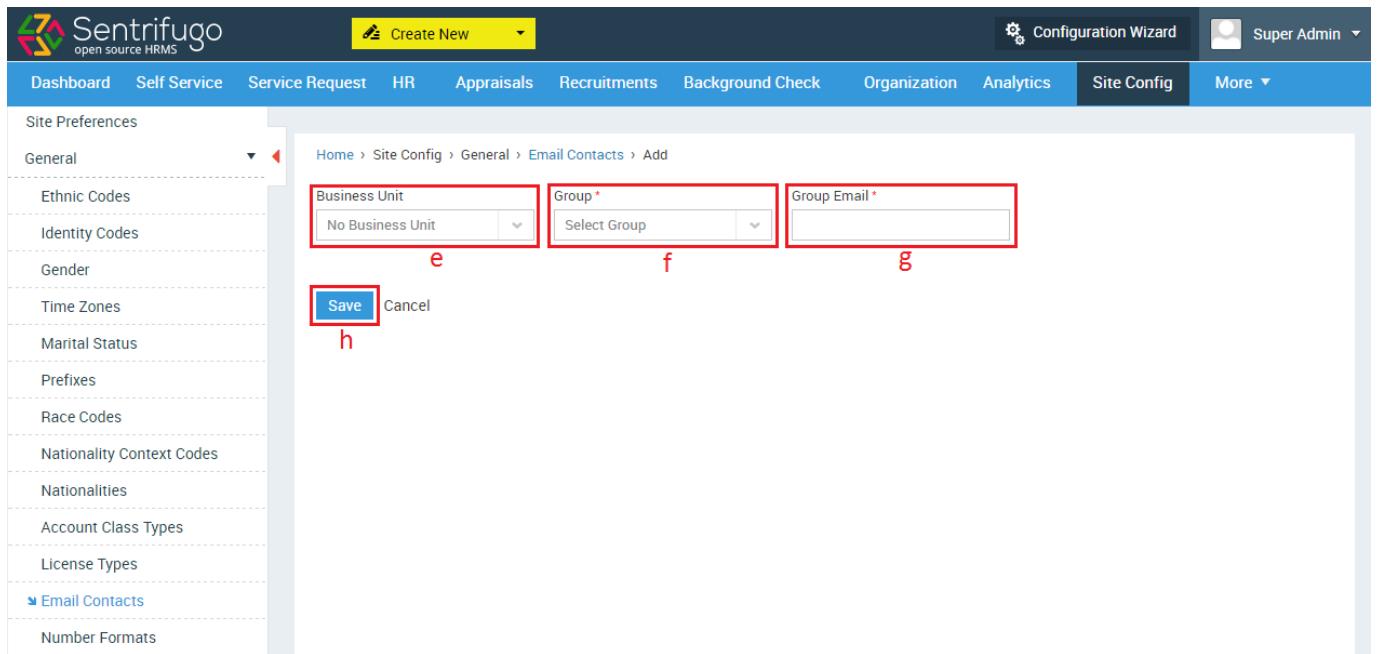


The screenshot shows the Sentrifugo interface. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (which is highlighted with a red box 'a'), and More. Below the navigation bar is a left sidebar with a tree view of Site Preferences: General, Ethnic Codes, Identity Codes, Gender, Time Zones, Marital Status, Prefixes, Race Codes, Nationality Context Codes, Nationalities, Account Class Types, License Types, Email Contacts (which is highlighted with a red box 'c'), and Number Formats. The main content area shows a list of Email Contacts with columns for Action, Business Unit, Group, and Group Email. An entry for 'Orange Blossom' is listed under 'Business Unit' and 'Requisition - HR Group' under 'Group'. The 'Group Email' field contains 'Jessy@example.com'. There are buttons for Pin to shortcuts, Add (highlighted with a red box 'd'), and search.

Figure 43

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

Please refer Figure 44



This screenshot shows the 'Add' form for Email Contacts. The left sidebar and top navigation bar are identical to Figure 43. The main form has fields for Business Unit (with 'No Business Unit' selected), Group (with 'Select Group' placeholder), and Group Email (empty). At the bottom, there are 'Save' and 'Cancel' buttons, with 'Save' highlighted with 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

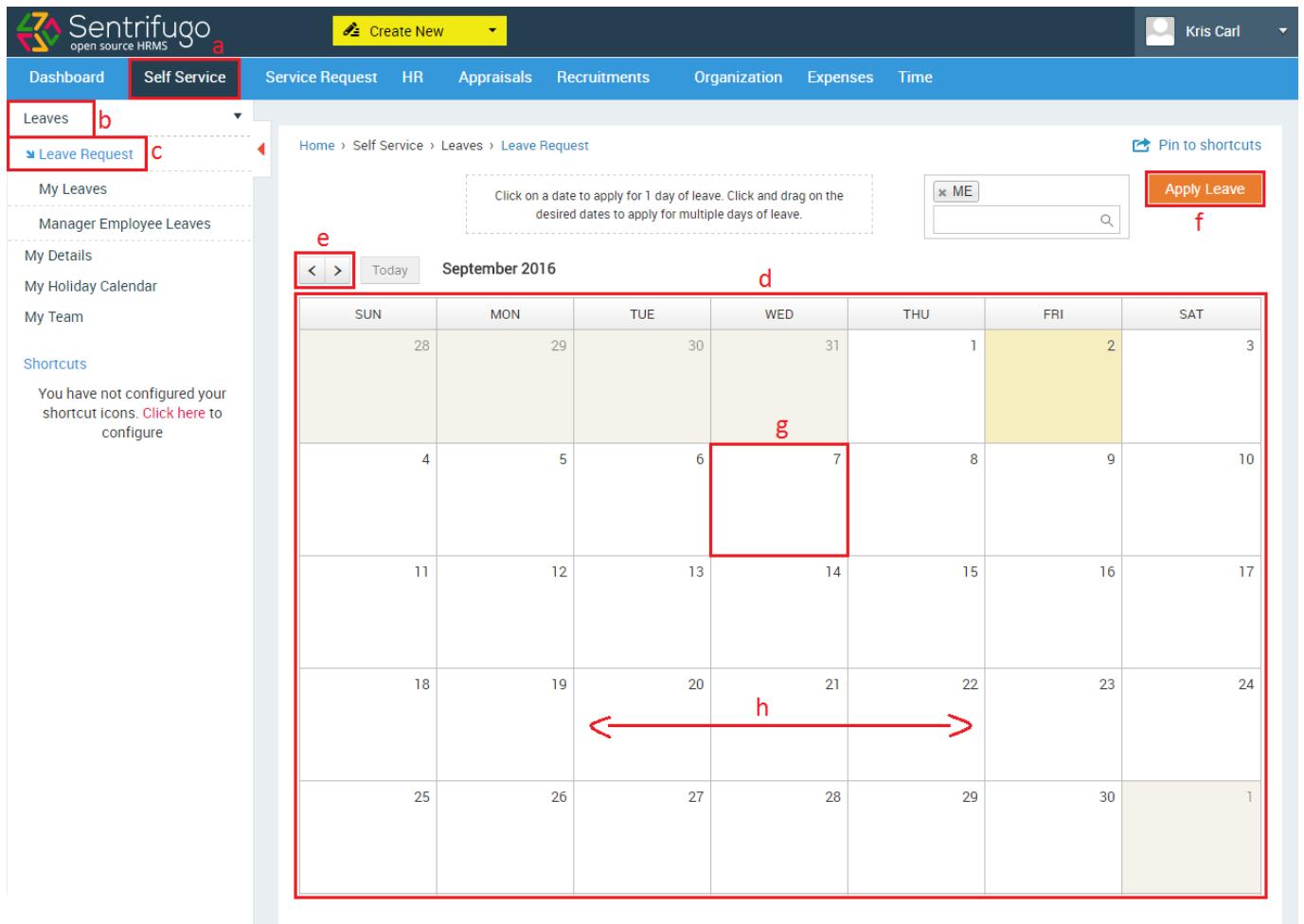
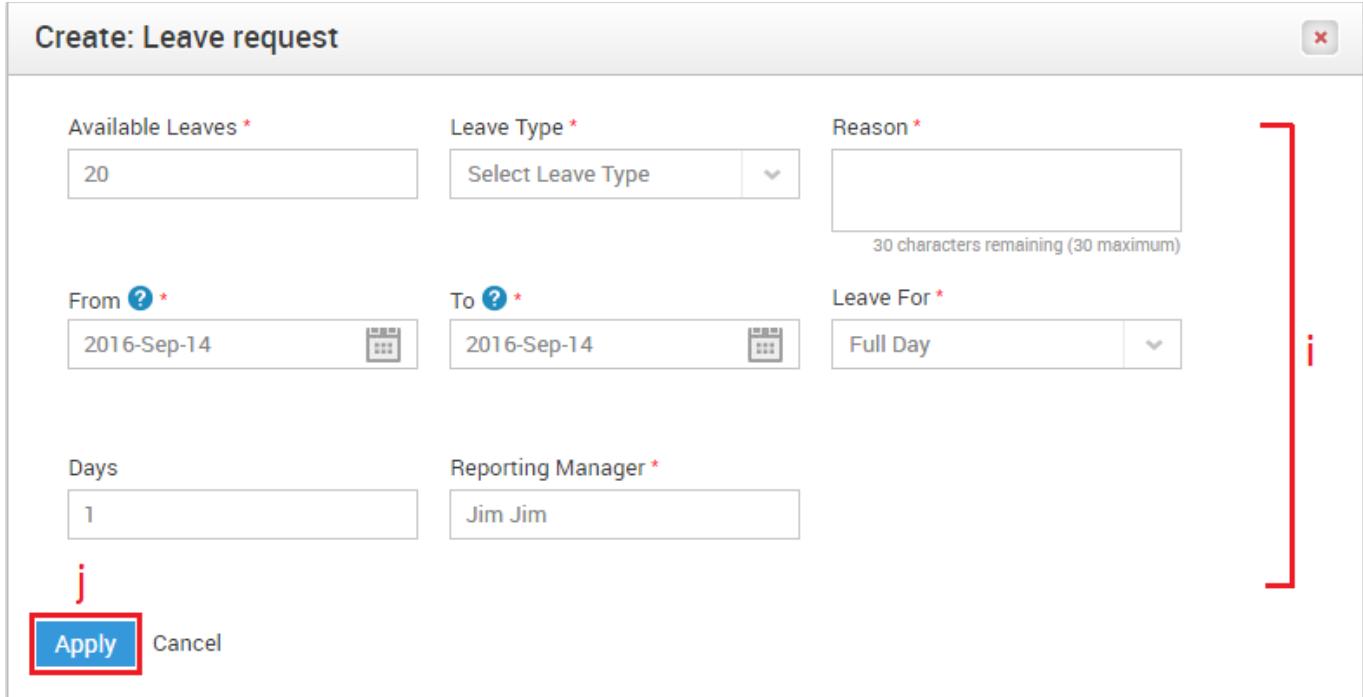


Figure 45

- 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

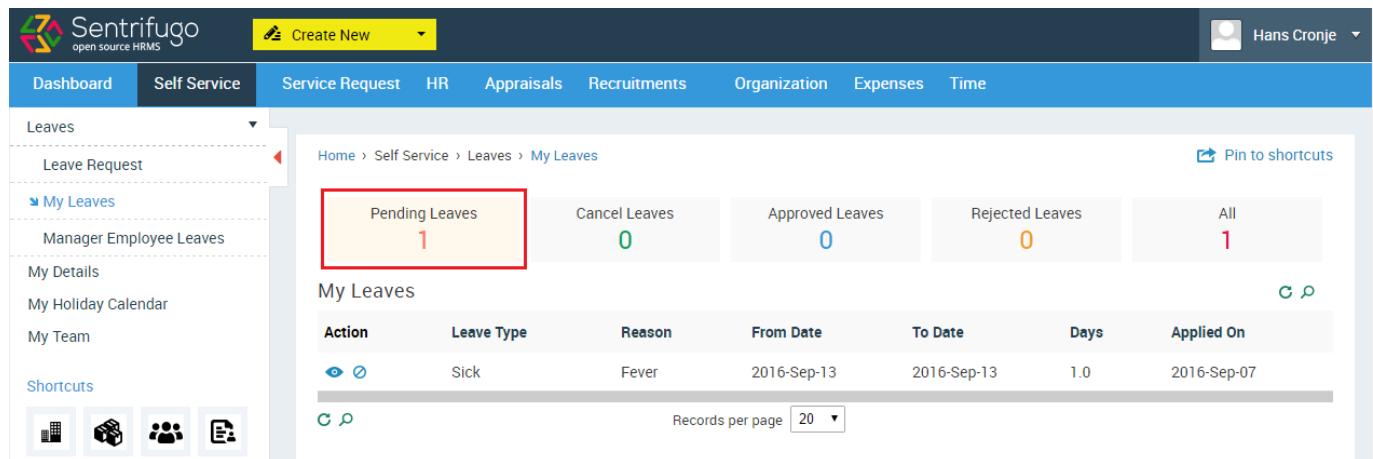
Available Leaves *	Leave Type *	Reason *
20	Select Leave Type	30 characters remaining (30 maximum)
From ? *	To ? *	Leave For *
2016-Sep-14	2016-Sep-14	Full Day
Days	Reporting Manager *	
1	Jim Jim	
<input type="button" value="Apply"/> <input type="button" value="Cancel"/>		

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



Sentrifugo open source HRMS

Self Service

Leaves

- Leave Request
- My Leaves**
- Manager Employee Leaves
- My Details
- My Holiday Calendar
- My Team
- Shortcuts

Home > Self Service > Leaves > My Leaves

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

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

Records per page **20**

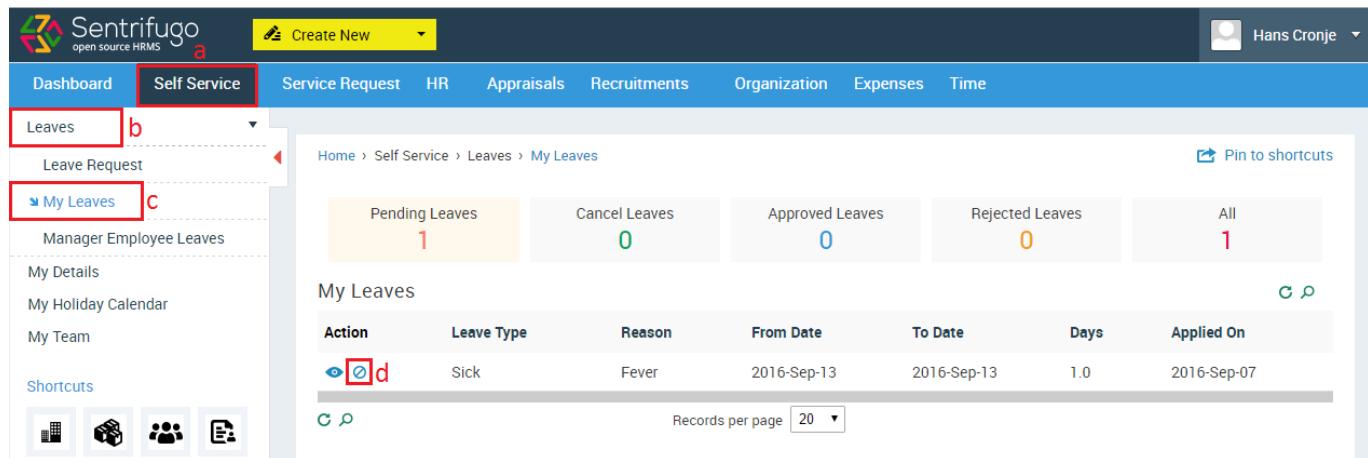
Figure 47

3.7 How do I cancel a Leave Request?

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

Employee

Please refer Figure 48



The screenshot shows the Sentrifugo self-service interface. The top navigation bar includes 'Create New' 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', 'Recruitments', 'Organization', 'Expenses', and 'Time'. A left sidebar has a 'Leaves' section with 'Leave Request' (highlighted with a red box) and 'My Leaves' (highlighted with a red box). Other options in the sidebar include 'Manager Employee Leaves', 'My Details', 'My Holiday Calendar', 'My Team', and 'Shortcuts' with icons for Home, Appraisals, Recruitments, and Expenses.

The main content area shows a summary of leave status: Pending Leaves (1), Cancel Leaves (0), Approved Leaves (0), Rejected Leaves (0), and a total of 1 leave applied on 2016-Sep-07. Below this is a table titled 'My Leaves' with columns: Action, Leave Type, Reason, From Date, To Date, Days, and Applied On. One row is shown: Action (highlighted with a red box), Leave Type (Sick), Reason (Fever), From Date (2016-Sep-13), To Date (2016-Sep-13), Days (1.0), and Applied On (2016-Sep-07). At the bottom are 'Records per page' set to 20 and search/filter 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

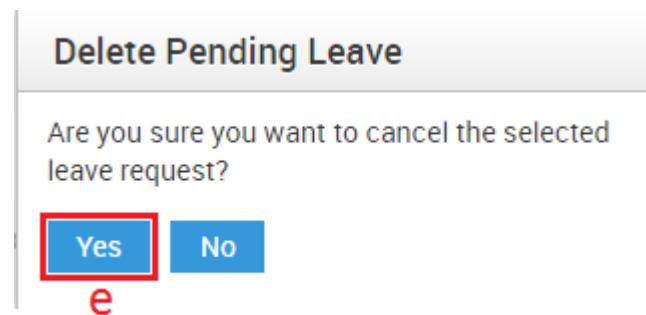


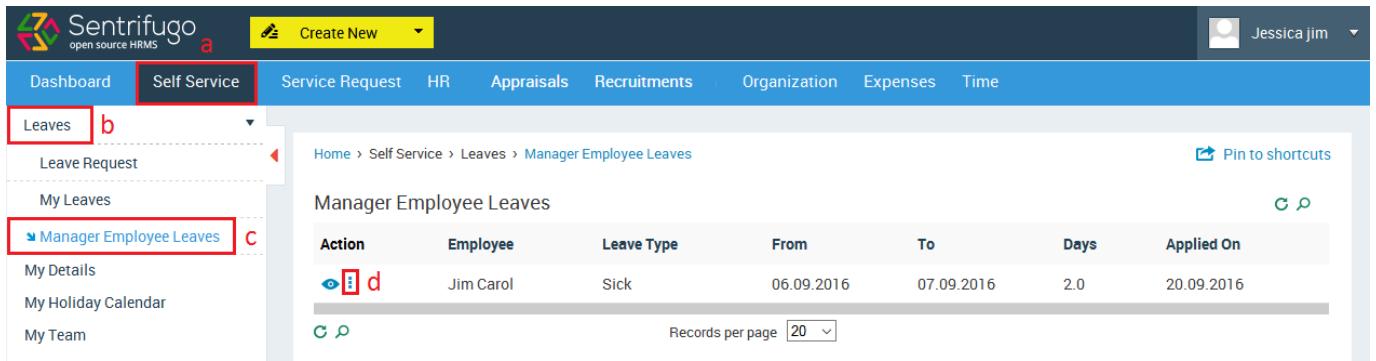
Figure 49

- 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 and labeled 'a'), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. On the far right, there is a user profile for 'Jessica Jim' with a dropdown arrow.

The main content area has a left sidebar with links for Leaves (highlighted with a red box and labeled 'b'), Leave Request, My Leaves, Manager Employee Leaves (highlighted with a red box and labeled 'c'), My Details, My Holiday Calendar, and My Team. Below the sidebar, the breadcrumb navigation shows 'Home > Self Service > Leaves > Manager Employee Leaves'. The main content area displays a grid titled 'Manager Employee Leaves' with the following columns: Action, Employee, Leave Type, From, To, Days, and Applied On. A single row is visible in the grid:

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

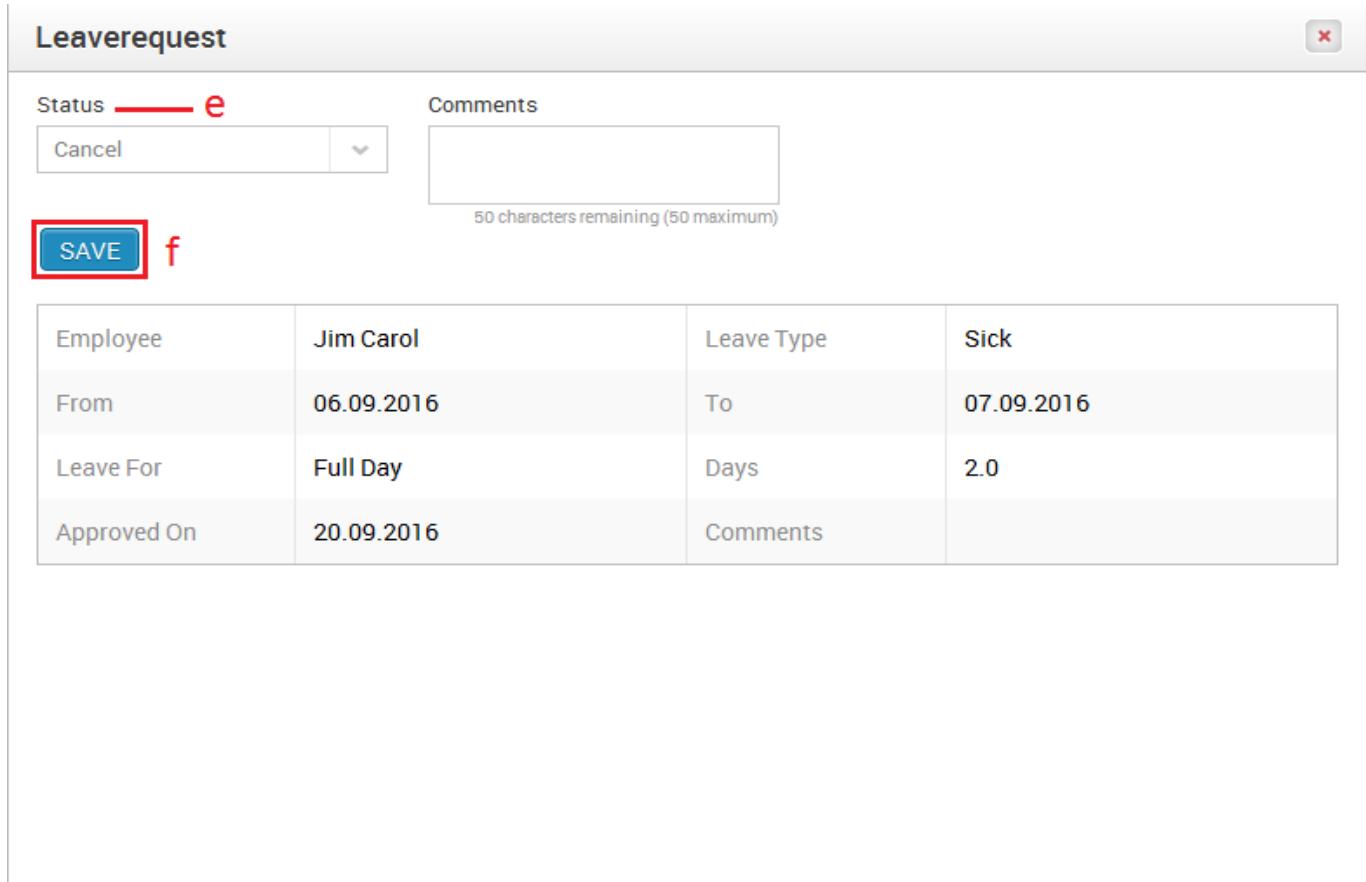
At the bottom of the grid, there are buttons for 'Records per page' (set to 20) and a refresh icon. There are also 'Pin to shortcuts' and 'Print' icons at the top right of the content area.

Figure 50

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

A small pop up window will open.

Please refer Figure 51



The screenshot shows a 'Leaverequest' form. At the top left is a status dropdown labeled 'Status' with 'e' next to it, showing 'Cancel'. To its right is a 'Comments' text area with a note '50 characters remaining (50 maximum)'. Below these are two buttons: a blue 'SAVE' button with 'f' next to it, and a standard 'Cancel' button. The main body of the form contains a table with the following data:

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	

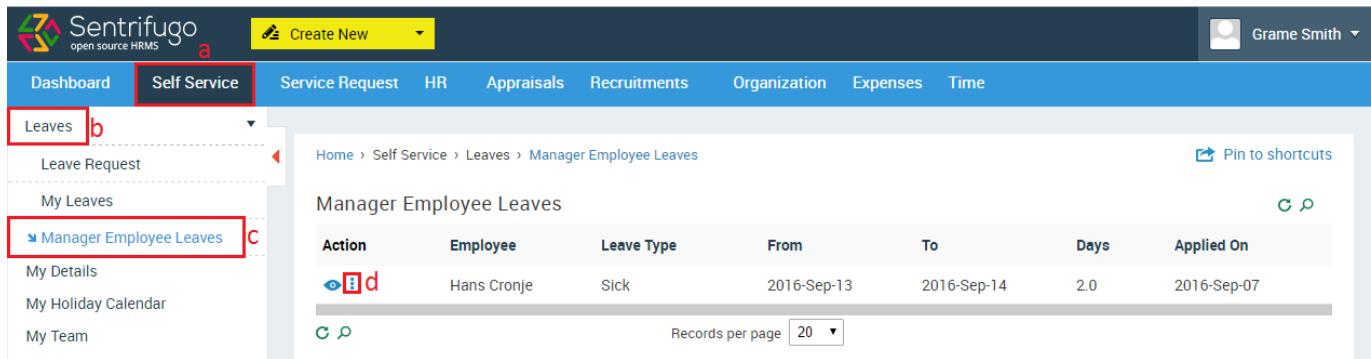
Figure 51

- 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 'Manager Employee Leaves' page. At the top left is the 'Self Service' menu item with 'a' next to it. The left sidebar has a 'Leaves' section with 'b' next to it, containing 'Leave Request', 'My Leaves', and 'Manager Employee Leaves' (which is highlighted with 'c'). Other sidebar items include 'My Details', 'My Holiday Calendar', and 'My Team'. The main content area shows a table titled 'Manager Employee Leaves' with the following data:

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

Figure 52

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

A small pop up window will open.

Please refer Figure 53

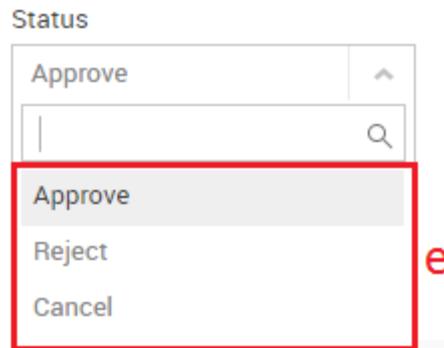


Figure 53

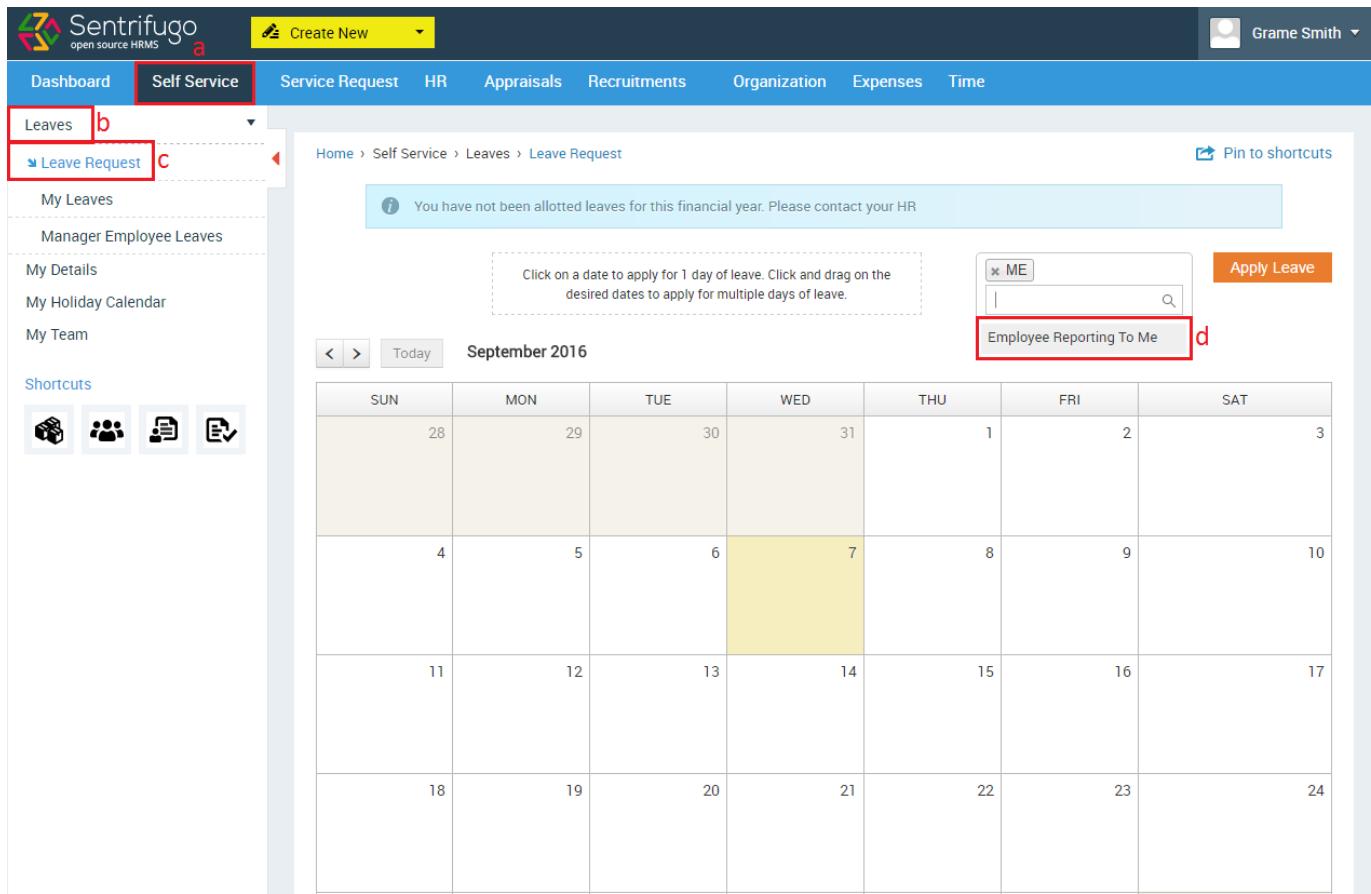
- e. Select the status

Click **SAVE** button to complete the selected action.

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

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

Please refer Figure 54



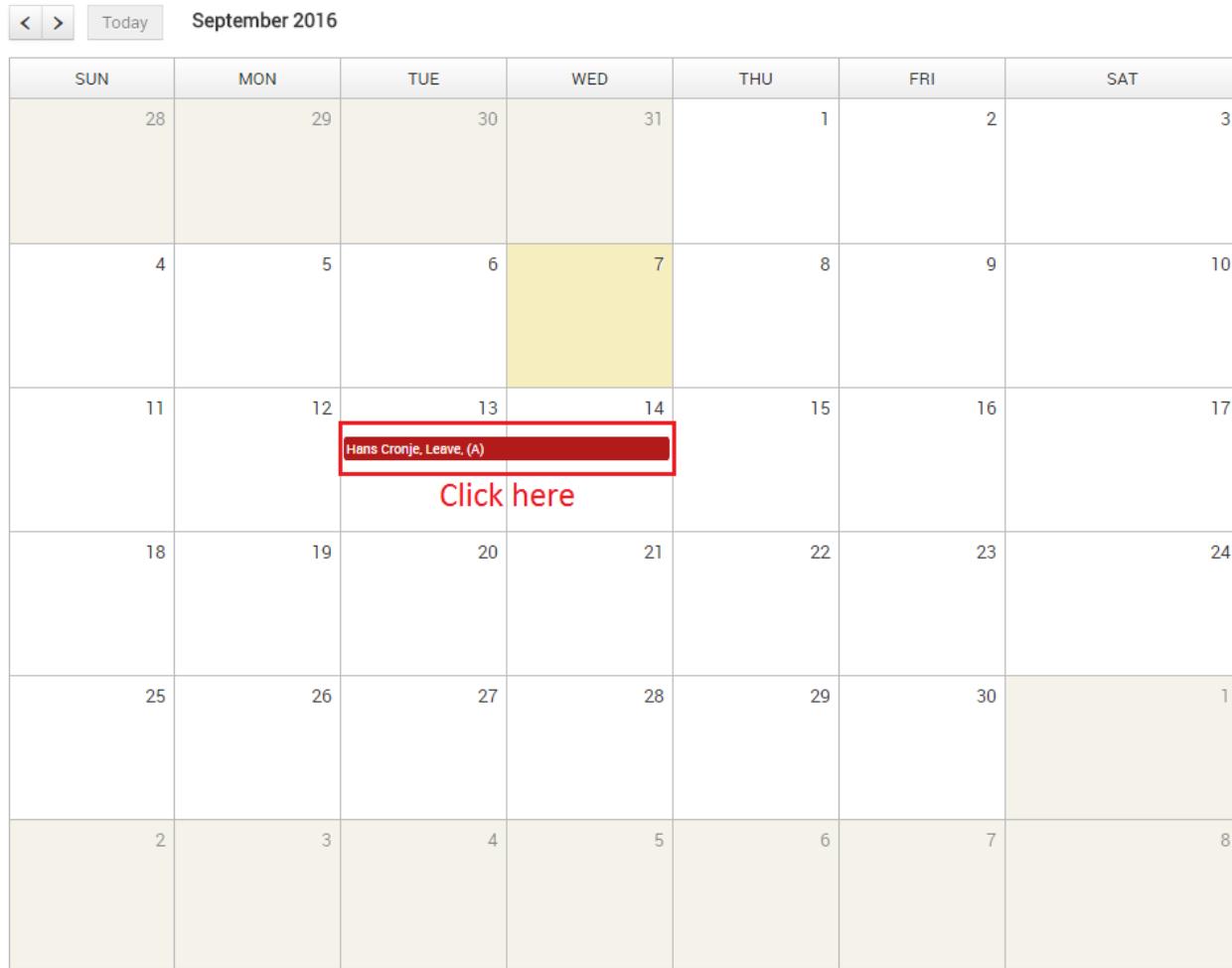
The screenshot shows the Sentrifugo open source HRMS application interface. At the top, there is a navigation bar with links for Create New, Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. The 'Self Service' link is highlighted with a red box (a). Below the navigation bar is a left sidebar with links for Leaves (highlighted with a red box b), Leave Request (highlighted with a red box c), My Leaves, Manager Employee Leaves, My Details, My Holiday Calendar, and My Team. Under the 'Shortcuts' section, there are four icons: a person icon, a group icon, a document icon, and an envelope icon. The main content area displays a breadcrumb path: Home > Self Service > Leaves > Leave Request. A message box states: 'You have not been allotted leaves for this financial year. Please contact your HR'. Below this is a calendar for September 2016. A tooltip says: 'Click on a date to apply for 1 day of leave. Click and drag on the desired dates to apply for multiple days of leave.' On the right side of the calendar, there is a search bar with placeholder text 'x ME' and a magnifying glass icon, followed by an 'Apply Leave' button. A red box (d) highlights the 'Employee Reporting To Me' dropdown in the top right corner of the main content area.

Figure 54

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

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

Please refer Figure 55



Click here

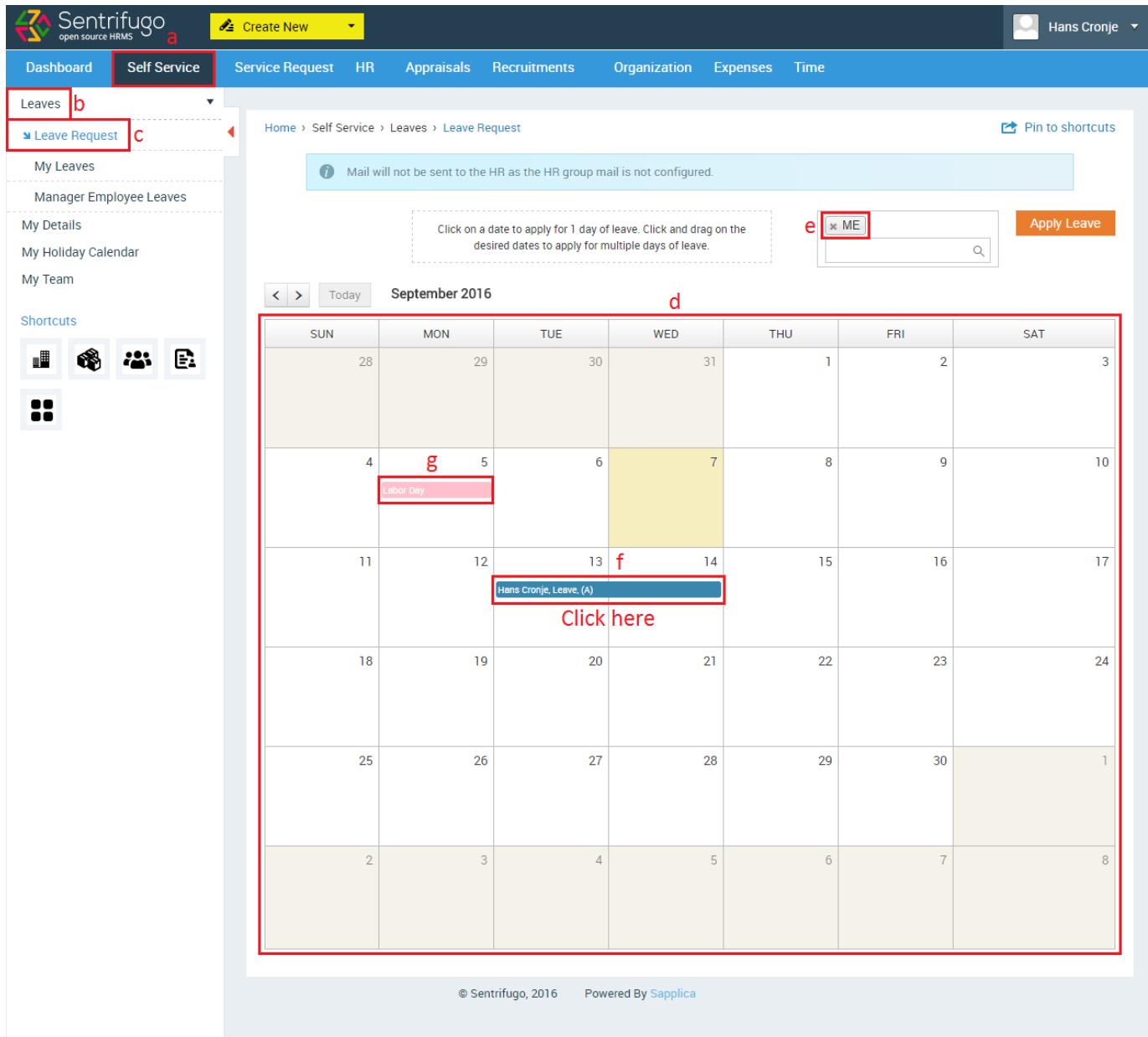
Leaverequest

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

Figure 55

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

Please refer Figure 56



The screenshot shows the Sentrifugo self-service interface. The top navigation bar includes 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, Recruitments, Organization, Expenses, and Time. On the left, a sidebar has 'Leaves' (selected) and 'Leave Request' (highlighted with a red box). The main content area shows a breadcrumb path: Home > Self Service > Leaves > Leave Request. A message states: 'Mail will not be sent to the HR as the HR group mail is not configured.' Below is a calendar for September 2016. A tooltip says: 'Click on a date to apply for 1 day of leave. Click and drag on the desired dates to apply for multiple days of leave.' A search bar with 'x ME' and an 'Apply Leave' button are present. The calendar grid shows various days from 28 to 30 of August, followed by Labor Day (September 4th), days 5 through 10, days 11 through 17, days 18 through 24, days 25 through 30 of September, and days 1 through 8 of October. Specific days are highlighted: September 4th is red with 'Labor Day' text; September 13th has a blue horizontal bar with 'Hans Cronje, Leave, (A)' and a 'Click here' link; and other days like 5, 7, 14, etc., have yellow backgrounds.

Figure 56

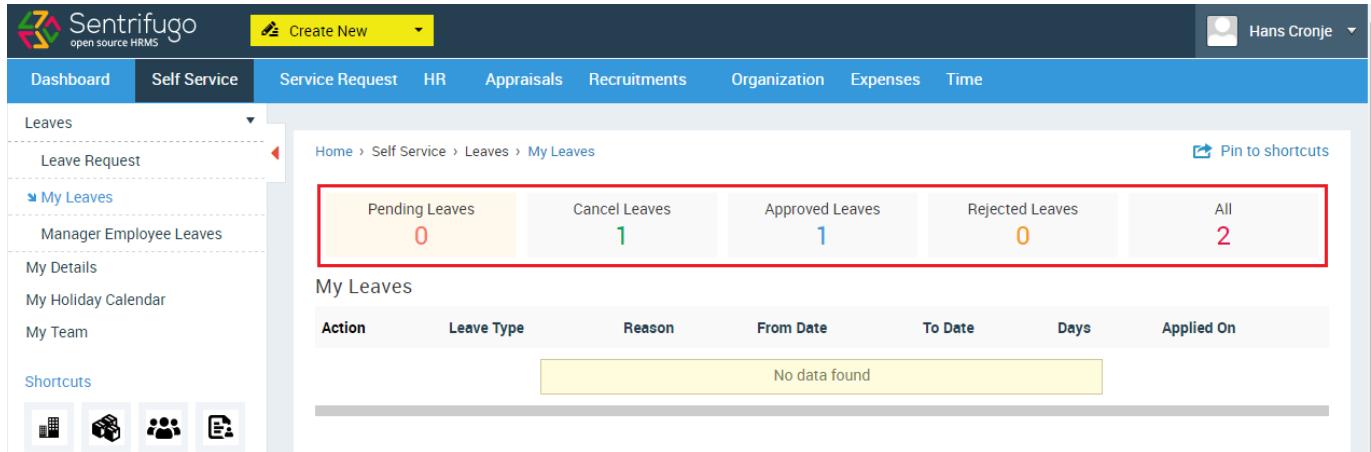
- Click **Self Service** in the top menu
- Click **Leaves** on the left side panel
- Click **Leave Request** in the submenu
- A calendar plugin will be displayed.
- Select the option 'Me' (It will be selected by default)
- For the day(s) on which you have taken leave(s)/raised leave request(s), a horizontal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

g. You can also see holidays

Your leaves requests will be categorized in to 5 types:

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

Please refer Figure 57

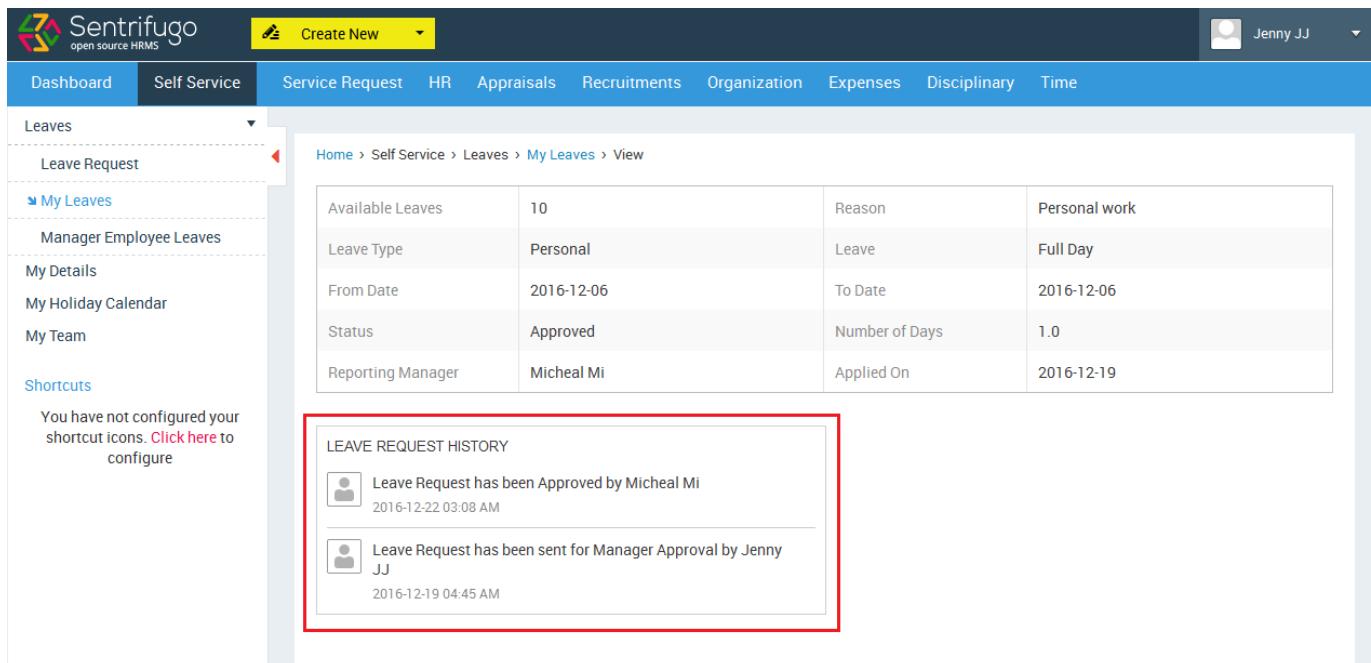


The screenshot shows the Sentrifugo self-service dashboard. The top navigation bar includes 'Create New' and a user profile for 'Hans Cronje'. Below the navigation is a blue header bar with tabs: Dashboard, Self Service (selected), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. A sidebar on the left is titled 'Leaves' and contains links for Leave Request, My Leaves (selected), Manager Employee Leaves, My Details, My Holiday Calendar, My Team, and Shortcuts. The main content area shows a summary of leave types with counts: Pending Leaves (0), Cancel Leaves (1), Approved Leaves (1), Rejected Leaves (0), and All (2). Below this is a table titled 'My Leaves' with columns: Action, Leave Type, Reason, From Date, To Date, Days, and Applied On. A message 'No data found' is displayed in the table body.

Figure 57

Click on any category to view the leaves accordingly.

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



This screenshot shows a detailed view of a leave request. The top navigation and sidebar are identical to Figure 57. The main content area shows a table with details: Available Leaves (10), Leave Type (Personal), Reason (Leave), From Date (2016-12-06), To Date (2016-12-06), Status (Approved), Number of Days (1.0), Reporting Manager (Micheal Mi), and Applied On (2016-12-19). Below this is a section titled 'LEAVE REQUEST HISTORY' with two entries: 'Leave Request has been Approved by Micheal Mi 2016-12-22 03:08 AM' and 'Leave Request has been sent for Manager Approval by Jenny JJ 2016-12-19 04:45 AM'.

3.11 How do I create Holiday Groups?

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

Please refer Figure 58

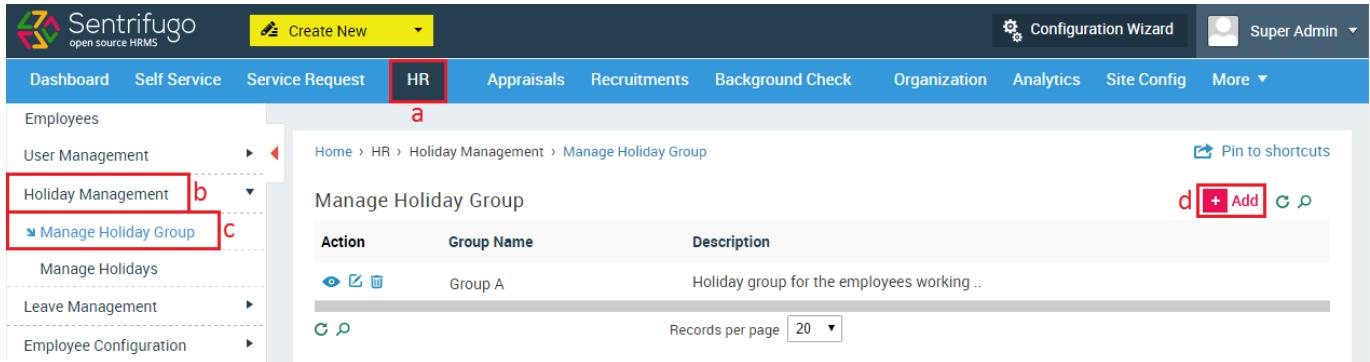


Figure 58

- 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

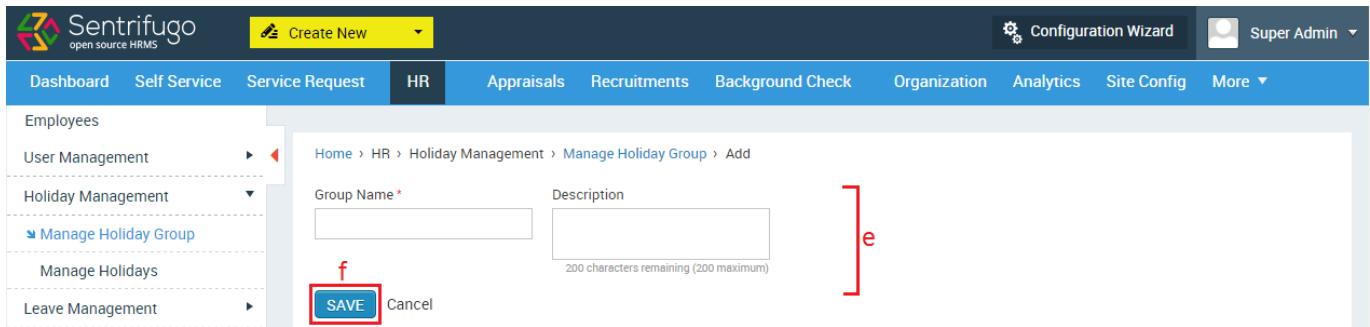
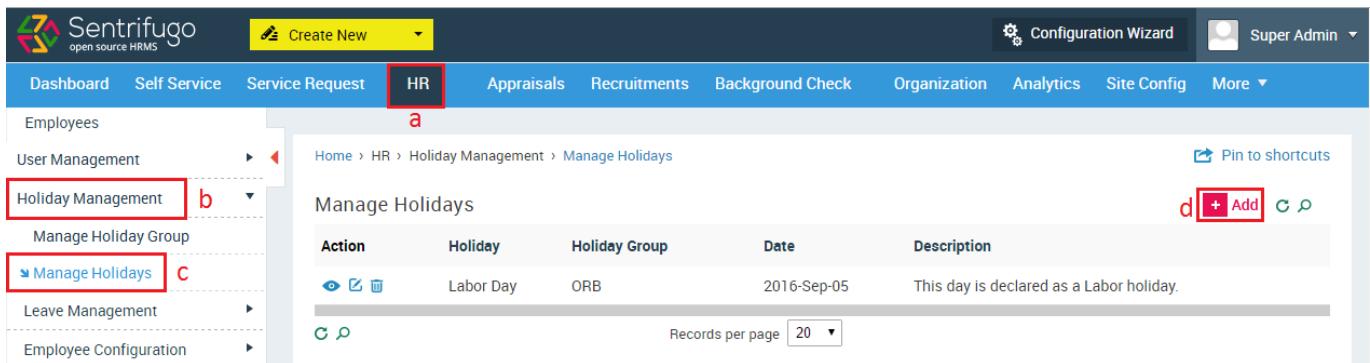


Figure 59

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

3.12 How do I create Holidays?

Please refer Figure 60

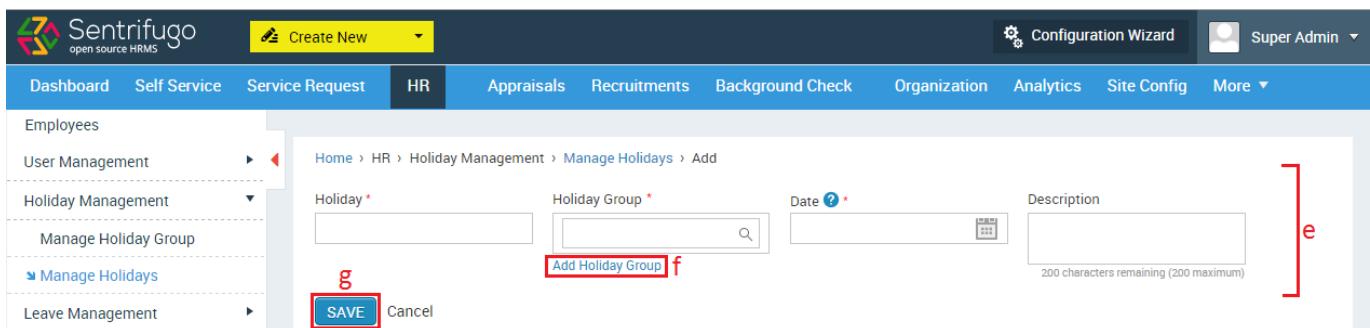


The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A dropdown menu for 'Create New' is open. On the right, there are links for Configuration Wizard and Super Admin. The main content area is titled 'Manage Holidays' and shows a table with columns: Action, Holiday, Holiday Group, Date, and Description. One row is listed: Labor Day, ORB, 2016-Sep-05, and 'This day is declared as a Labor holiday.' Below the table are buttons for 'Records per page' (set to 20) and 'C P'. To the left, a sidebar menu lists Employees, User Management (with 'Holiday Management' highlighted with a red box), Manage Holiday Group, Manage Holidays (highlighted with a red box), Leave Management, and Employee Configuration. A red letter 'a' is placed above the 'HR' button, 'b' is next to 'Holiday Management', 'c' is next to 'Manage Holidays', and 'd' is next to the '+Add' button.

Figure 60

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

Please refer Figure 61



The screenshot shows the 'Add' form for 'Manage Holidays'. The top navigation bar and sidebar are identical to Figure 60. The main form has fields for 'Holiday *' (text input), 'Holiday Group *' (dropdown with a search icon), 'Date *' (date picker), and 'Description' (text area with a character limit of 200). A red letter 'e' is placed to the right of the 'Description' field. Below the form are 'SAVE' and 'Cancel' buttons. Red letters 'g' and 'f' are placed near the 'SAVE' button and the 'Add Holiday Group' link respectively.

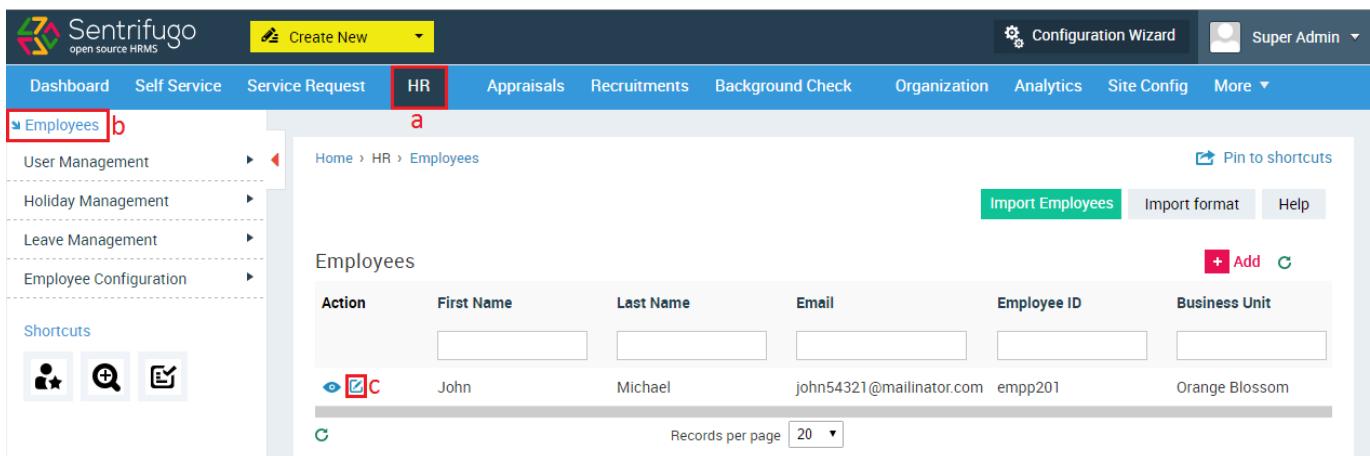
Figure 61

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

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

3.13 How do I assign Holidays to Employees?

Please refer Figure 62



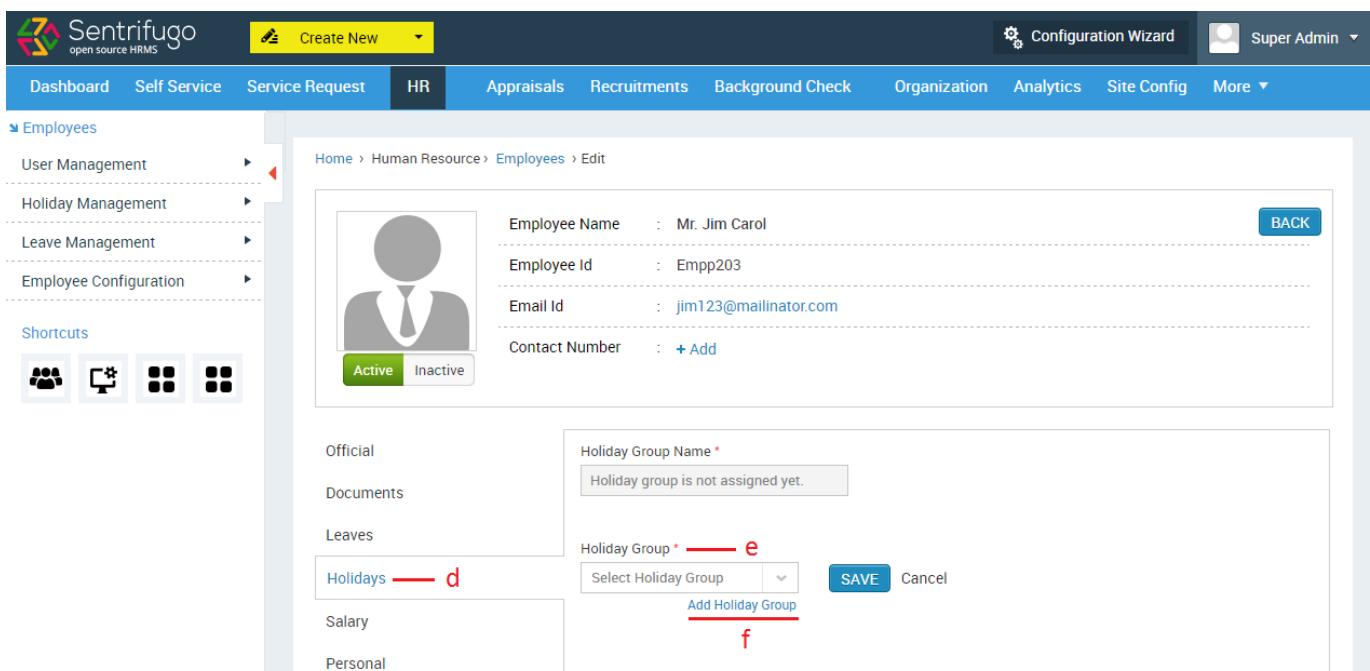
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Configuration Wizard, Super Admin, Dashboard, Self Service, Service Request, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A red box labeled 'a' highlights the 'HR' link in the top menu. Another red box labeled 'b' highlights the 'Employees' link in the left sidebar. A third red box labeled 'c' highlights the edit icon next to an employee's name in the list table.

Action	First Name	Last Name	Email	Employee ID	Business Unit
	John	Michael	john54321@mailinator.com	empp201	Orange Blossom

Figure 62

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

Please refer Figure 63



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Configuration Wizard, Super Admin, Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A red box labeled 'd' highlights the 'Holidays' link in the left sidebar. A red box labeled 'e' highlights the 'Select Holiday Group' dropdown. A red box labeled 'f' highlights the 'Add Holiday Group' button.

Employee Details:

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

Holiday Group Assignment:

- Official
- Documents
- Leaves
- Holidays **d**
- Salary
- Personal

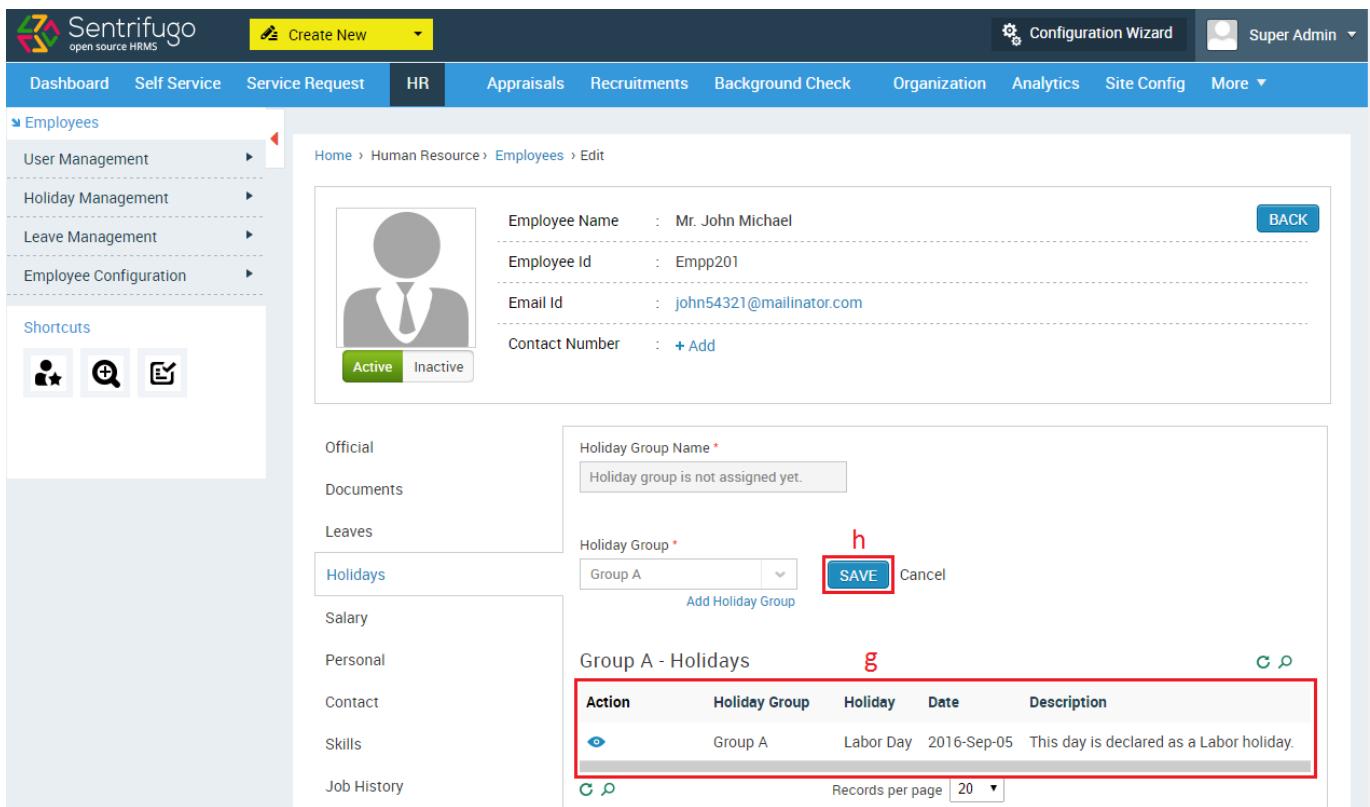
Holiday Group Selection:

- Holiday Group Name * : Holiday group is not assigned yet.
- Holiday Group * **e** : Select Holiday Group
- Add Holiday Group **f**
- SAVE Cancel

Figure 63

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

Please refer Figure 64



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, Create New (dropdown), Configuration Wizard, Super Admin, and more. The main menu on the left is under 'Employees' and includes User Management, Holiday Management, Leave Management, Employee Configuration, and Shortcuts (with icons for Active and Inactive users).

The current page is 'Employees > Edit' for Mr. John Michael (Employee ID: Empp201). The employee details shown are Employee Name: Mr. John Michael, Employee Id: Empp201, Email Id: john54321@mailinator.com, and Contact Number: + Add.

In the 'Holidays' section, there is a note: 'Holiday group is not assigned yet.' A dropdown menu for 'Holiday Group' is open, showing 'Group A' selected. A red box highlights the 'SAVE' button, which is labeled 'h'. Below this, a grid titled 'Group A - Holidays' displays one record:

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

Red boxes also highlight the grid header 'g' and the 'Records per page' dropdown set to 20.

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

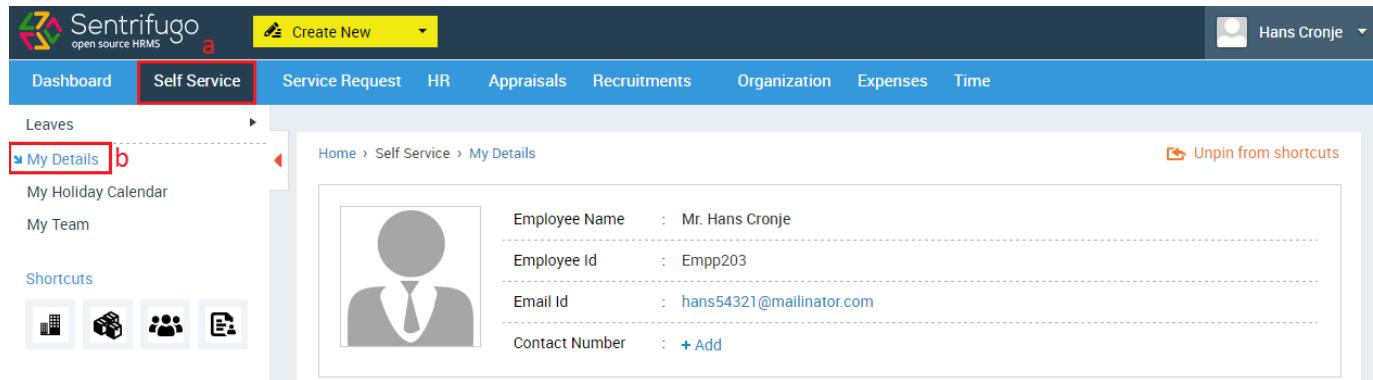
Self-Service enables you to raise and handle leave requests. You can access your personal information, documents and leave details. You can also check the details of the employees working in your team. A Manager has the privilege to add Employees to Sentrifugo, provided he is their reporting manager.

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



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

Figure 65

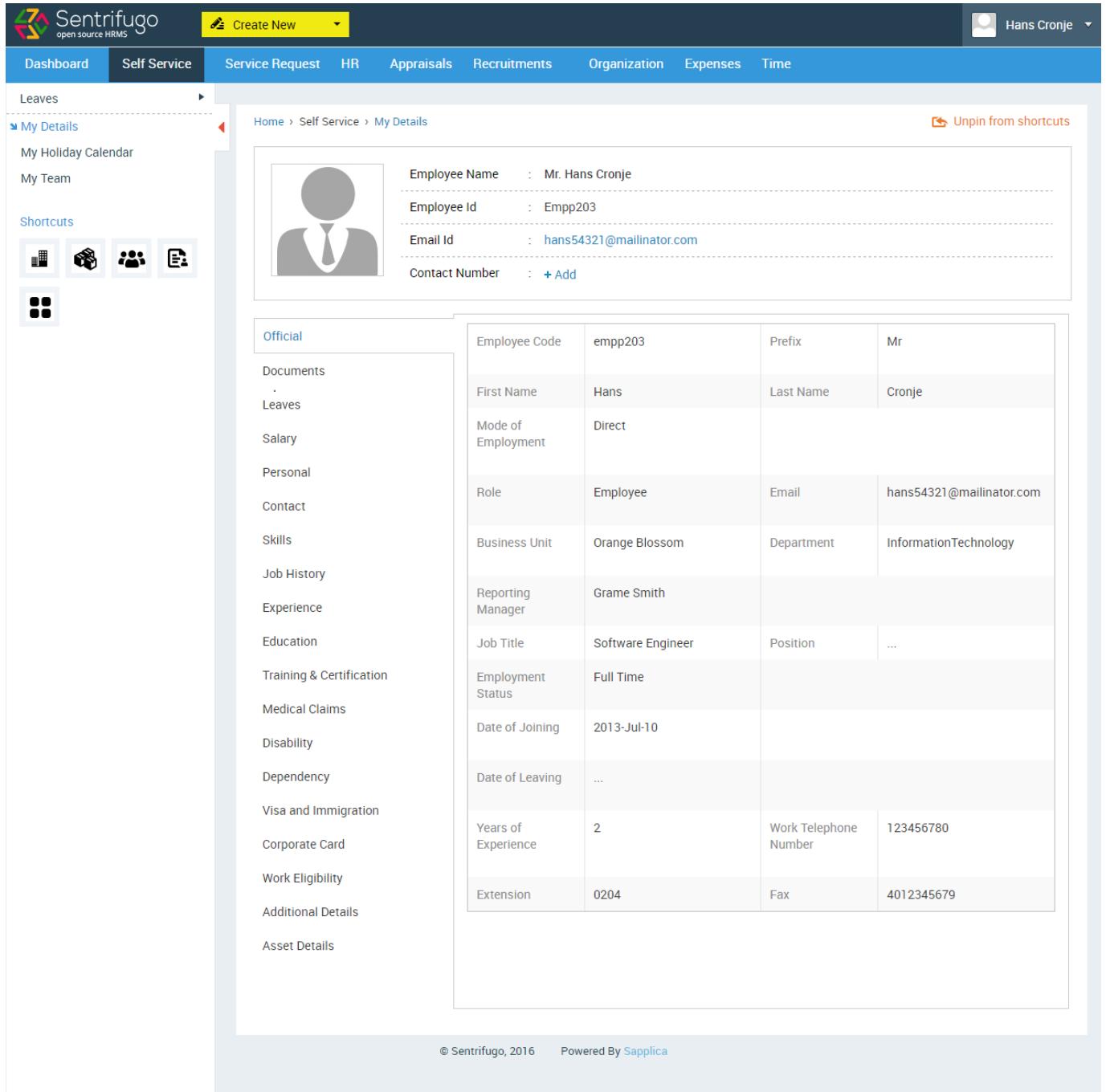
- Click **Self Service** in the top menu
- Click **My Details** on the left menu panel



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 HRMS application interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. A yellow 'Create New' button is located in the top right corner. On the far right, a user profile for 'Hans Cronje' is displayed.

The main content area shows the 'My Details' section under 'Self Service'. It includes a placeholder profile picture and a list of employee details:

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

Below this, a large table displays various official details:

Official	Employee Code	emp203	Prefix	Mr
Documents	First Name	Hans	Last Name	Cronje
Leaves	Mode of Employment	Direct		
Salary	Role	Employee	Email	hans54321@mailinator.com
Personal	Business Unit	Orange Blossom	Department	InformationTechnology
Contact	Reporting Manager	Grame Smith		
Skills	Job Title	Software Engineer	Position	...
Job History	Employment Status	Full Time		
Experience	Date of Joining	2013-Jul-10		
Education	Date of Leaving	...		
Training & Certification	Years of Experience	2	Work Telephone Number	123456780
Medical Claims	Extension	0204	Fax	4012345679
Disability				
Dependency				
Visa and Immigration				
Corporate Card				
Work Eligibility				
Additional Details				
Asset Details				

On the left side, a sidebar lists various categories such as Documents, Leaves, Salary, Personal, Contact, Skills, Job History, Experience, Education, Training & Certification, Medical Claims, Disability, Dependency, Visa and Immigration, Corporate Card, Work Eligibility, Additional Details, and Asset Details.

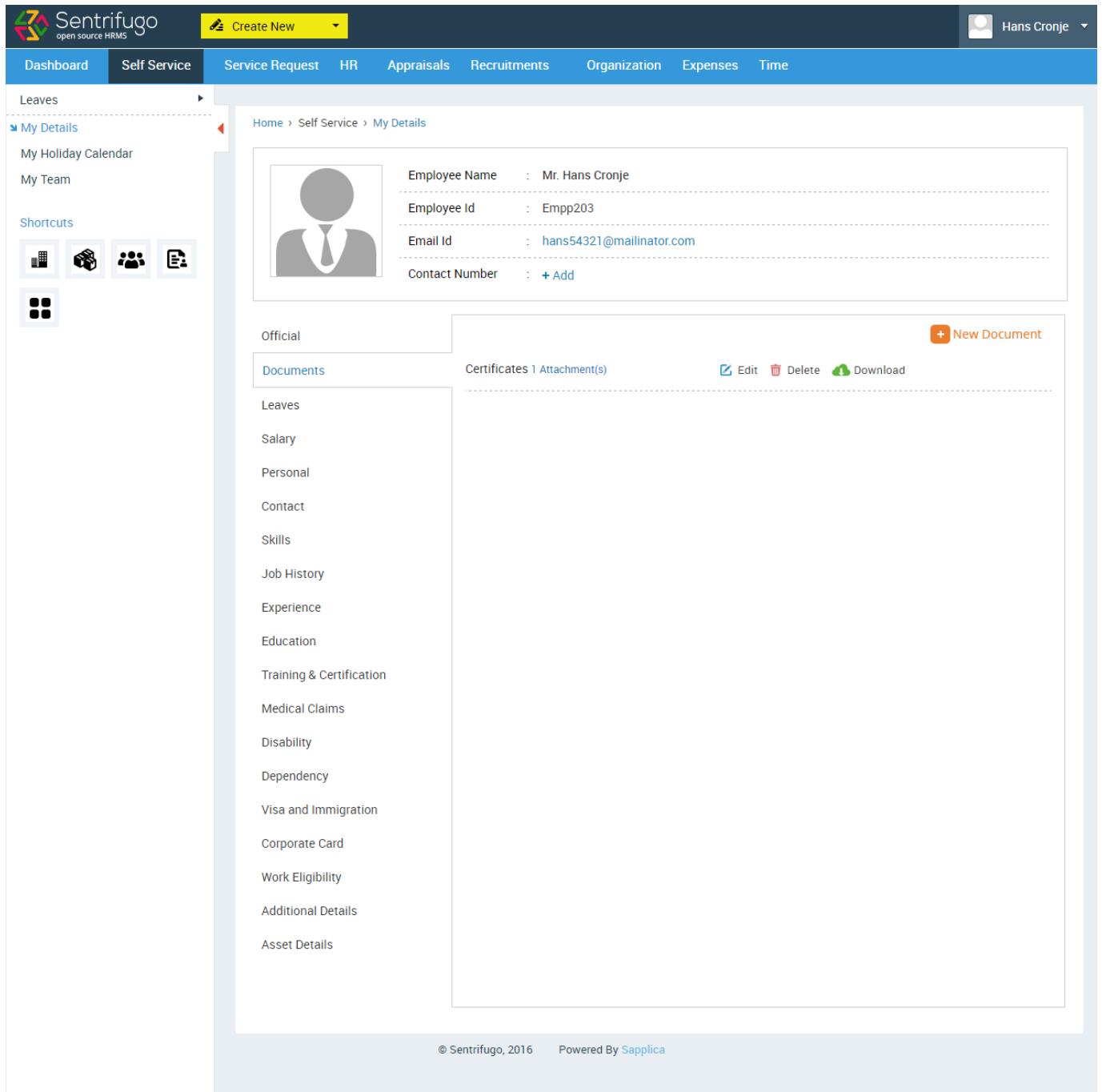
At the bottom of the page, there are copyright and power information: © Sentrifugo, 2016 and Powered By [Sapplica](#).

Figure 66

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

Documents

Please refer Figure 67



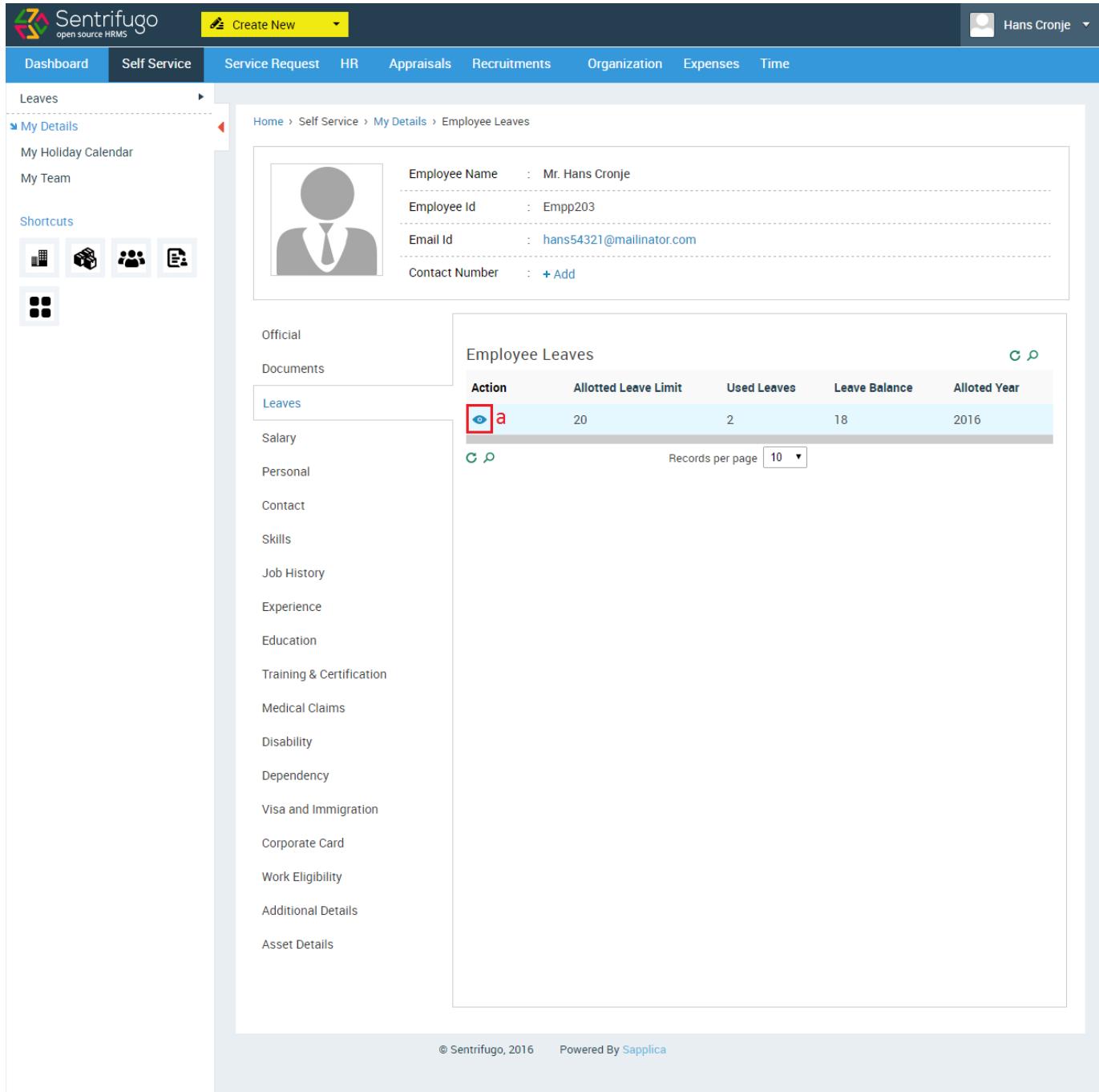
The screenshot shows the Sentrifugo open source HRMS interface. At the top, there is a navigation bar with links for Dashboard, Self Service (which is currently selected), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. A user profile for Hans Cronje is shown on the right. Below the navigation bar, a sidebar on the left contains sections for Leaves, My Details (selected), My Holiday Calendar, and My Team. Under My Details, there are icons for Home, Self Service, and My Details. A 'Shortcuts' section includes icons for Home, Self Service, My Details, and a grid icon. The main content area displays 'My Details' with a placeholder profile picture and employee information: Employee Name : Mr. Hans Cronje, Employee Id : EmpP203, Email Id : hans54321@mailinator.com, and Contact Number : + Add. Below this, there is a 'Official' section with a 'Documents' tab and a 'Certificates 1 Attachment(s)' tab. The 'Documents' tab lists various 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 are also 'Edit', 'Delete', and 'Download' buttons. At the bottom of the page, there is a footer with copyright information: © Sentrifugo, 2016 and Powered By [Sapplica](#).

Figure 67

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

Leaves

Please refer Figure 68



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

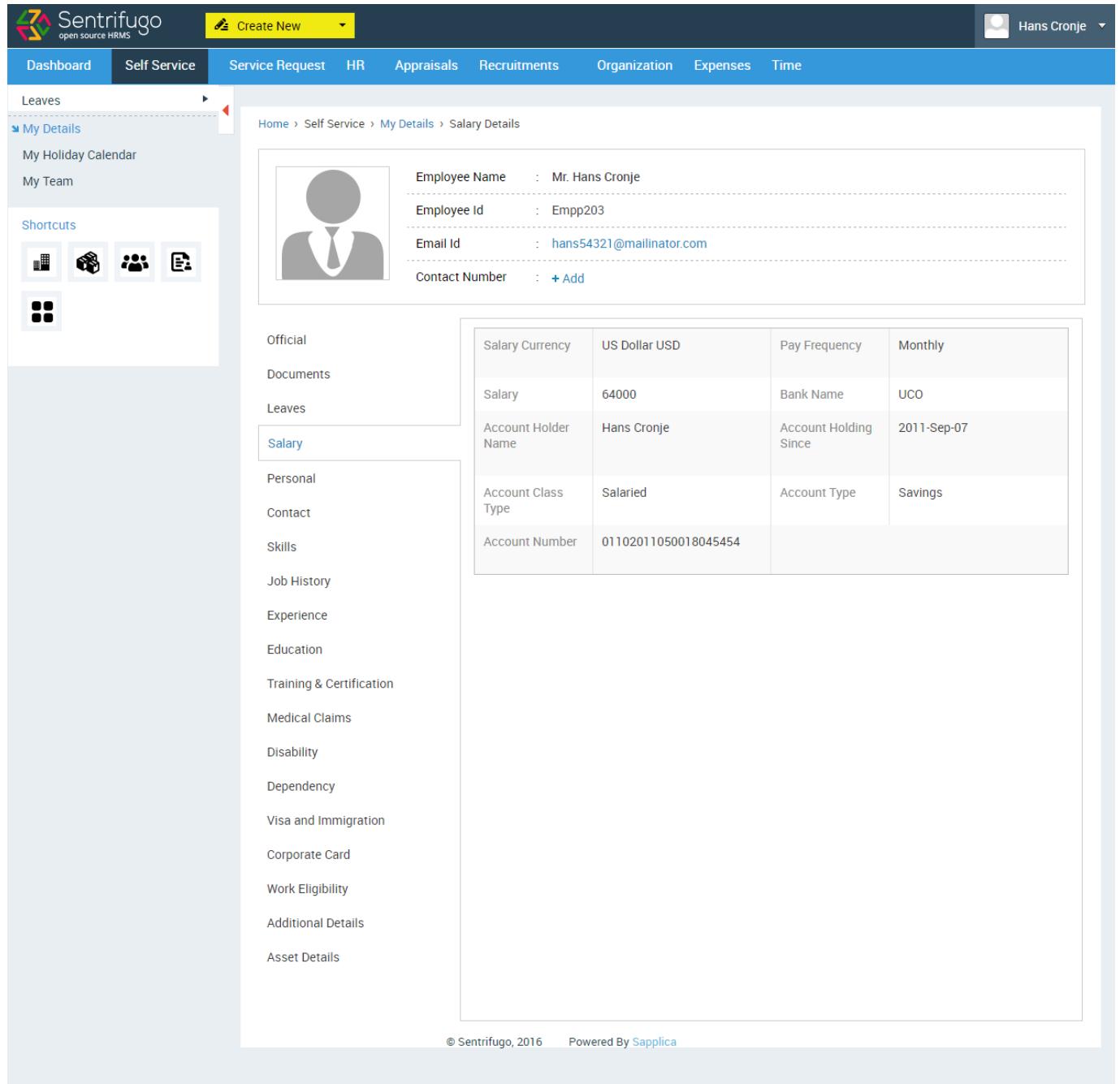
Figure 68

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

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

Salary

Please refer Figure 69



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

The main content area displays the 'Salary Details' for 'Mr. Hans Cronje'. It includes a profile picture and the following details:

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

On the left side, there is a sidebar with various links under categories like Official, Documents, Leaves, and Personal. Under the 'Salary' link in the Personal category, the following table is displayed:

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		

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

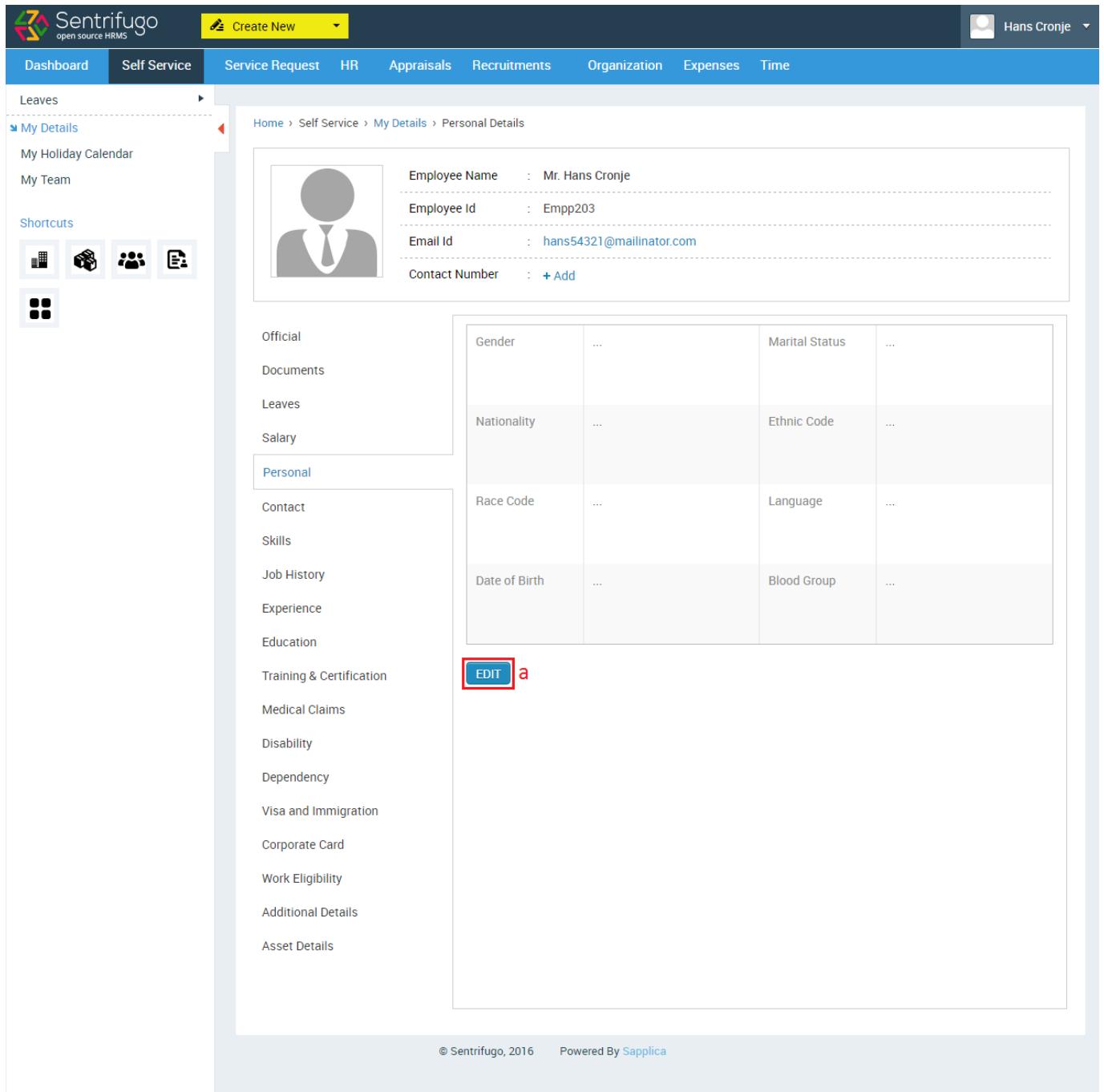
© Sentrifugo, 2016 Powered By [Sapplica](#)

Figure 69

You can view your salary and account details.

Personal

Please refer Figure 70



The screenshot shows the Sentrifugo open source HRMS application interface. At the top, there is a navigation bar with the Sentrifugo logo, a 'Create New' button, and a user profile for 'Hans Cronje'. Below the navigation bar is a blue header menu with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. The 'Self Service' tab is currently selected.

The main content area displays 'Personal Details' for an employee named 'Mr. Hans Cronje'. It includes a profile picture placeholder and a summary table with the following data:

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

Below this summary table is a larger grid for more detailed personal information. The grid has four columns:

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

A sidebar on the left contains a tree view under 'My Details' with nodes for My Holiday Calendar, My Team, and Shortcuts. Under 'Shortcuts', there are icons for Home, Self Service, My Details, and Personal. The 'Personal' node is currently selected. Other items in the sidebar include: Official, Documents, Leaves, Salary, 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 center of the grid, there is a red box around a blue 'EDIT' button, with the letter 'a' placed next to it. The footer of the page includes copyright information: © Sentrifugo, 2016 and Powered By Sapplica.

Figure 70

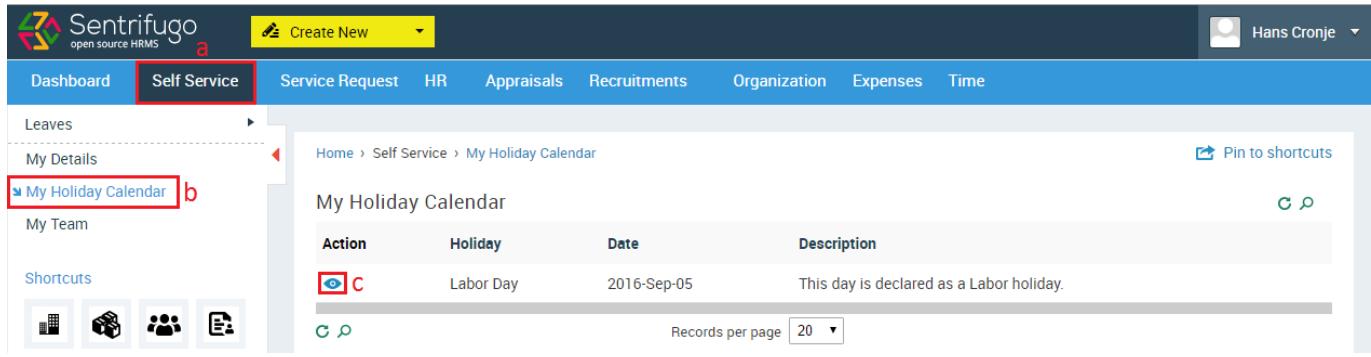
- Click **Edit icon** to add or modify any details

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

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

4.3 How do I view My Holiday Calendar?

Please refer Figure 71



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar has a logo (a stylized 'S' icon), the text 'Sentrifugo open source HRMS', a 'Create New' button, and a user profile for 'Hans Cronje'. The main menu below includes 'Dashboard', 'Self Service' (which is highlighted with a red box), 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. On the left, a sidebar menu lists 'Leaves', 'My Details', 'My Holiday Calendar' (highlighted with a red box), 'My Team', and 'Shortcuts' (with icons for Home, Employees, Tasks, and Help). The central content area displays a table titled 'My Holiday Calendar' with columns 'Action', 'Holiday', 'Date', and 'Description'. One row is shown: 'C' (View icon) | Labor Day | 2016-Sep-05 | This day is declared as a Labor holiday. Below the table are 'Records per page' and a dropdown set to '20'.

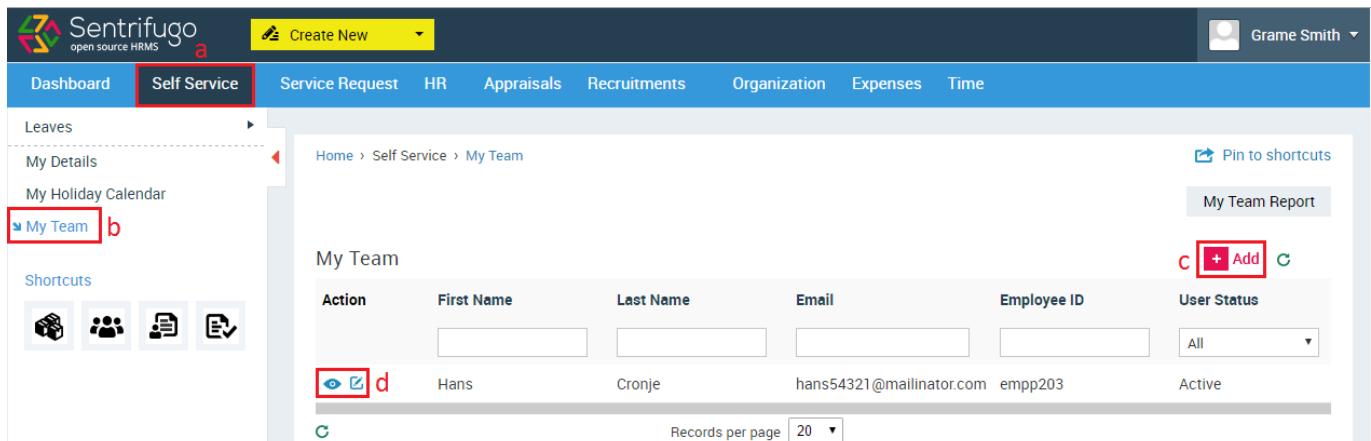
Figure 71

- 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 HRMS interface. The top navigation bar has a logo (a stylized 'S' icon), the text 'Sentrifugo open source HRMS', a 'Create New' button, and a user profile for 'Grame Smith'. The main menu below includes 'Dashboard', 'Self Service' (highlighted with a red box), 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. On the left, a sidebar menu lists 'Leaves', 'My Details', 'My Holiday Calendar', 'My Team' (highlighted with a red box), and 'Shortcuts' (with icons for Home, Employees, Tasks, and Help). The central content area displays a table titled 'My Team' with columns 'Action', 'First Name', 'Last Name', 'Email', 'Employee ID', and 'User Status'. One row is shown: 'C' (View icon) | 'D' (Edit icon) | Hans | Cronje | hans54321@mailinator.com | empp203 | Active. Below the table are 'Records per page' and a dropdown set to '20'.

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

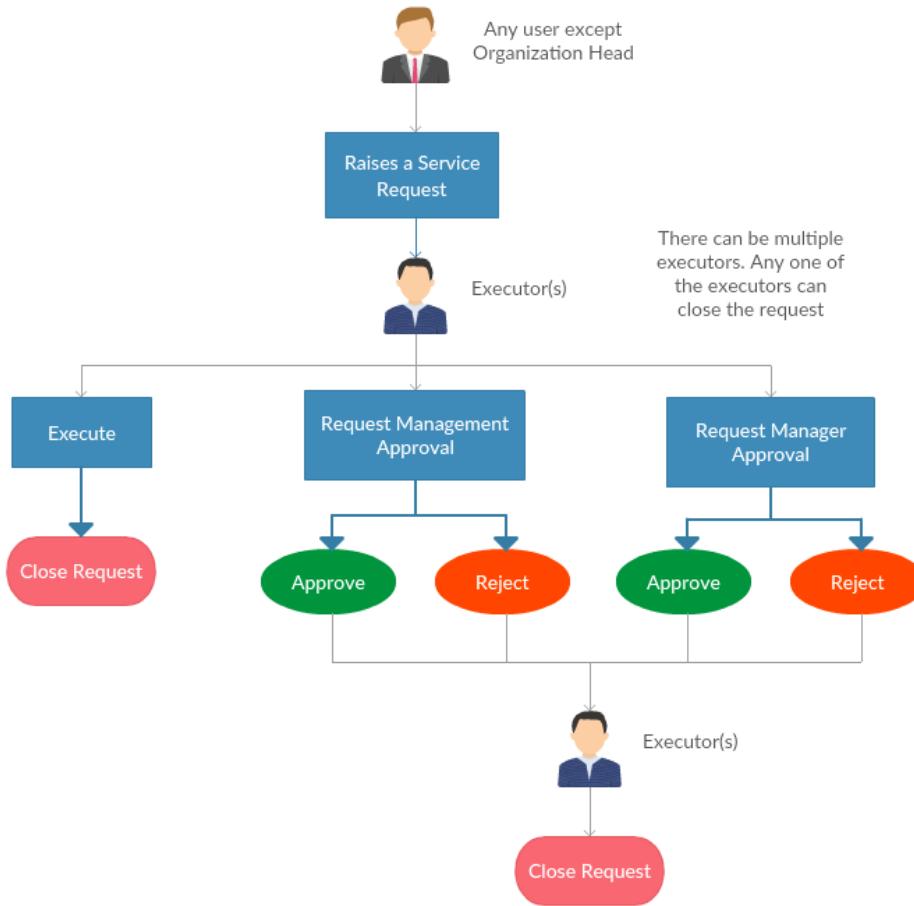
- d. Click **View/Edit** icon to view or edit employee details



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.

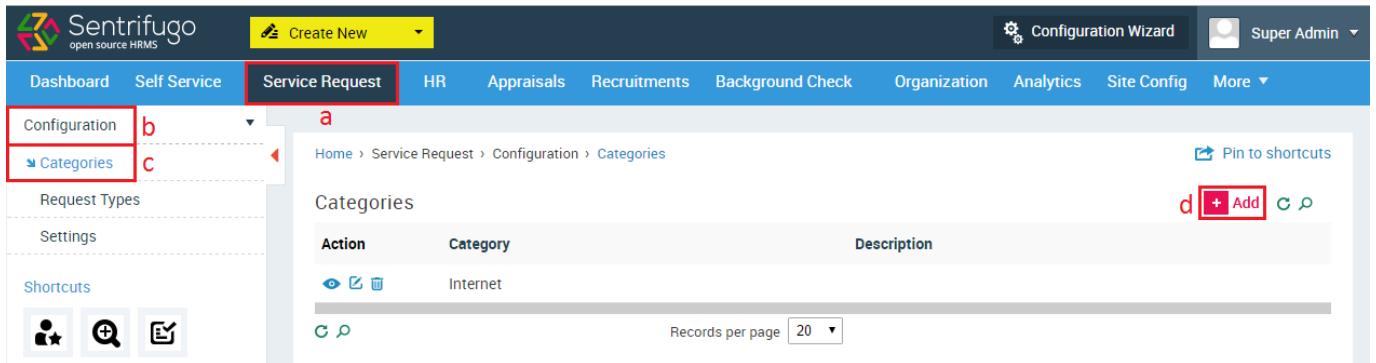


Description:

- 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

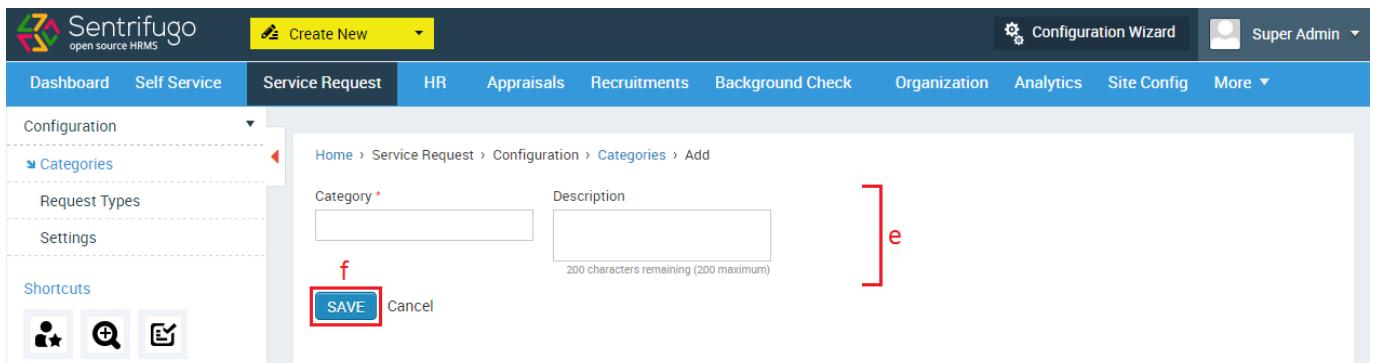


The screenshot shows the Sentrifugo interface for creating Service Request Categories. The top menu bar includes 'Create New', 'Service Request' (highlighted), 'Configuration Wizard', and 'Super Admin'. The left sidebar has 'Configuration' and 'Categories' (highlighted). The main content area displays a table of categories with one entry: 'Internet'. A red box highlights the '+Add' button in the top right corner.

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



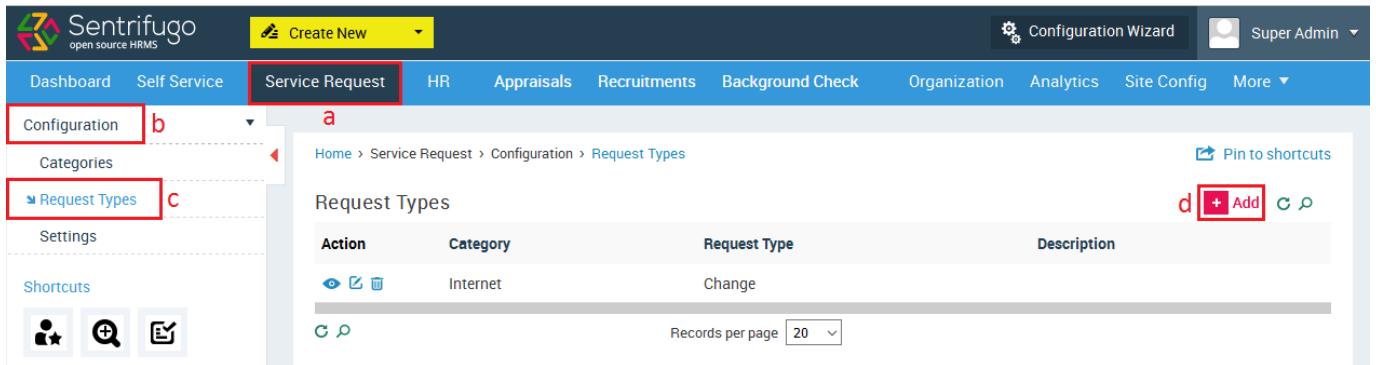
The screenshot shows the Sentrifugo interface for adding a new Service Request Category. The top menu bar includes 'Create New' and 'Service Request'. The left sidebar has 'Configuration' and 'Categories'. The main content area shows a form with 'Category' and 'Description' fields, and a 'SAVE' button (highlighted with a red box). A red bracket labeled 'e' groups the category and description fields. A red box labeled 'f' highlights 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 interface. The top navigation bar includes 'Create New' (dropdown), 'Configuration Wizard', 'Super Admin', and other links. The main menu has tabs: Dashboard, Self Service, Service Request (highlighted with a red box), HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A left sidebar has 'Configuration' (highlighted with a red box) expanded, showing 'Categories', 'Request Types' (highlighted with a red box), and 'Settings'. Below the sidebar are 'Shortcuts' with icons. The central content area shows 'Request Types' with a table:

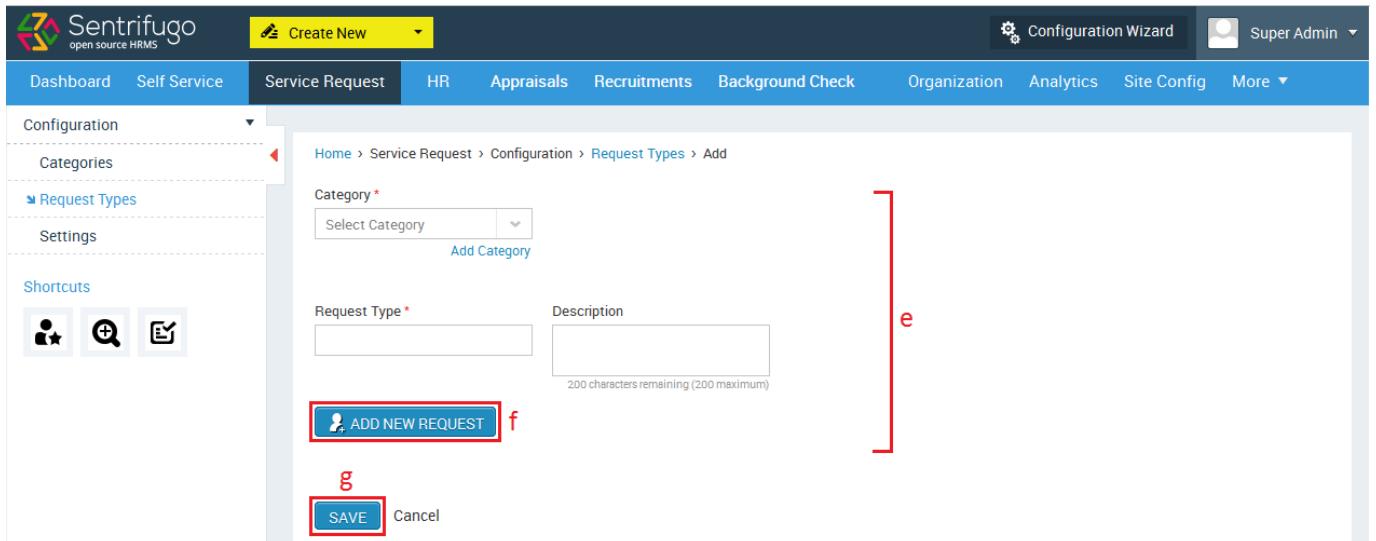
Action	Category	Request Type	Description
	Internet	Change	

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

Figure 75

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

Please refer Figure 76



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

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

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

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

Figure 76

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

5.3 How do I configure Service Request settings?

Please refer Figure 77

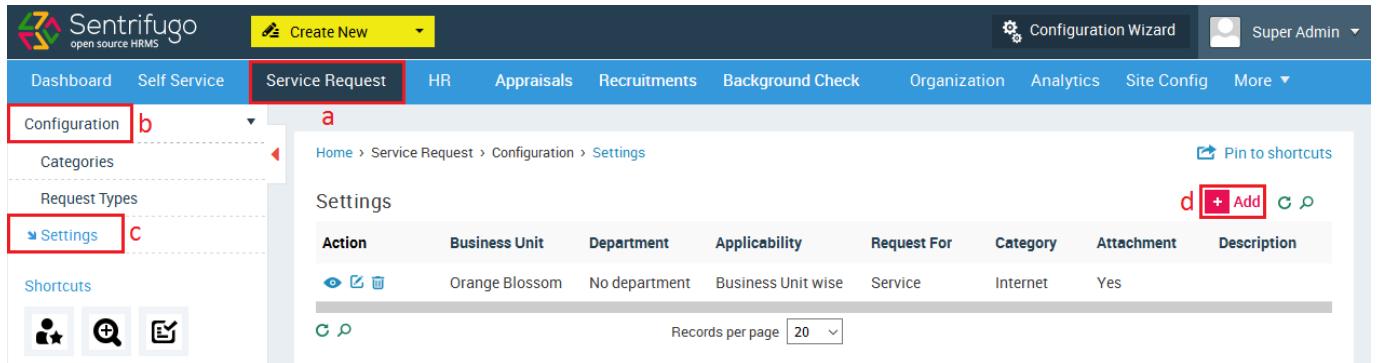


Figure 77

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

Please refer Figure 78

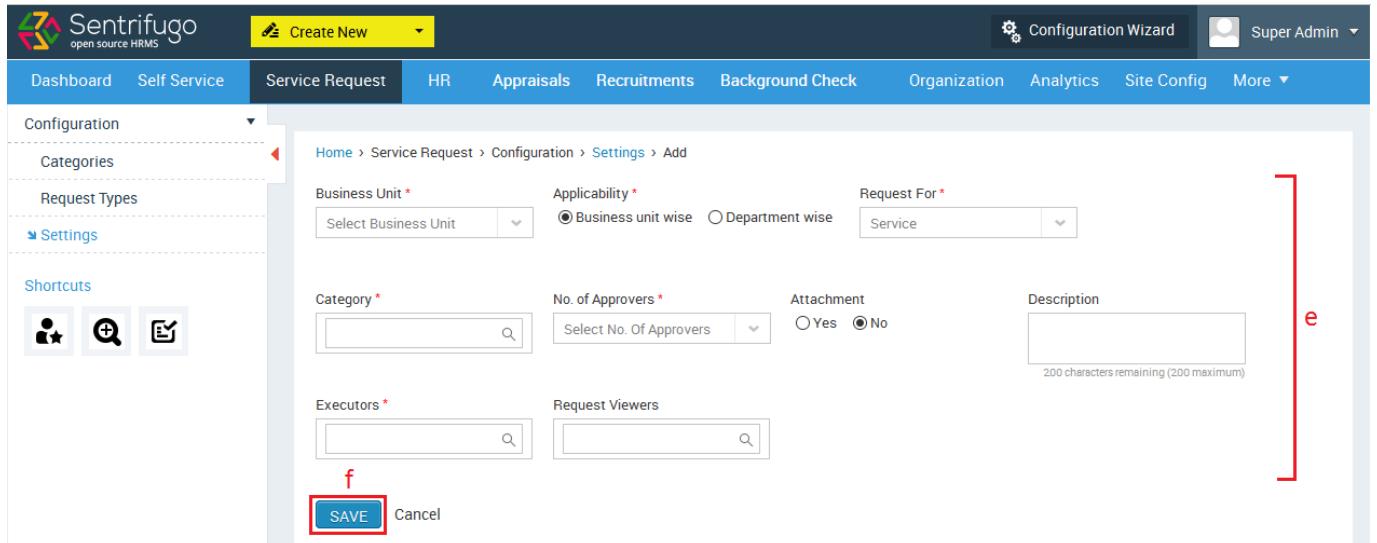


Figure 78

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

5.4 Who are Approvers, Executors and Viewers?

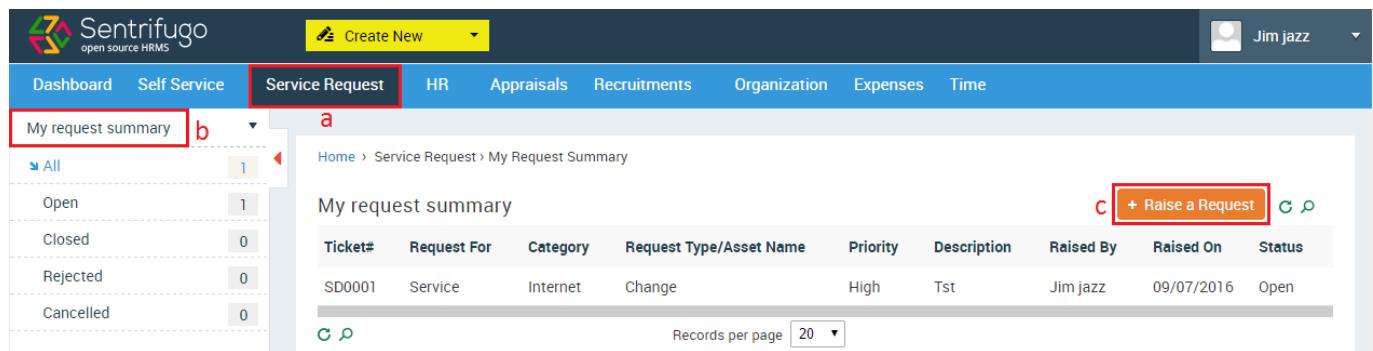
Approvers *Management*: They are responsible for providing approval for service requests. Executor(s) send a request for approval to the Approver(s). You can have a maximum of 3 approvers and a minimum of 1 approver.

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

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

5.5 How do I raise a Service Request?

Please refer Figure 79

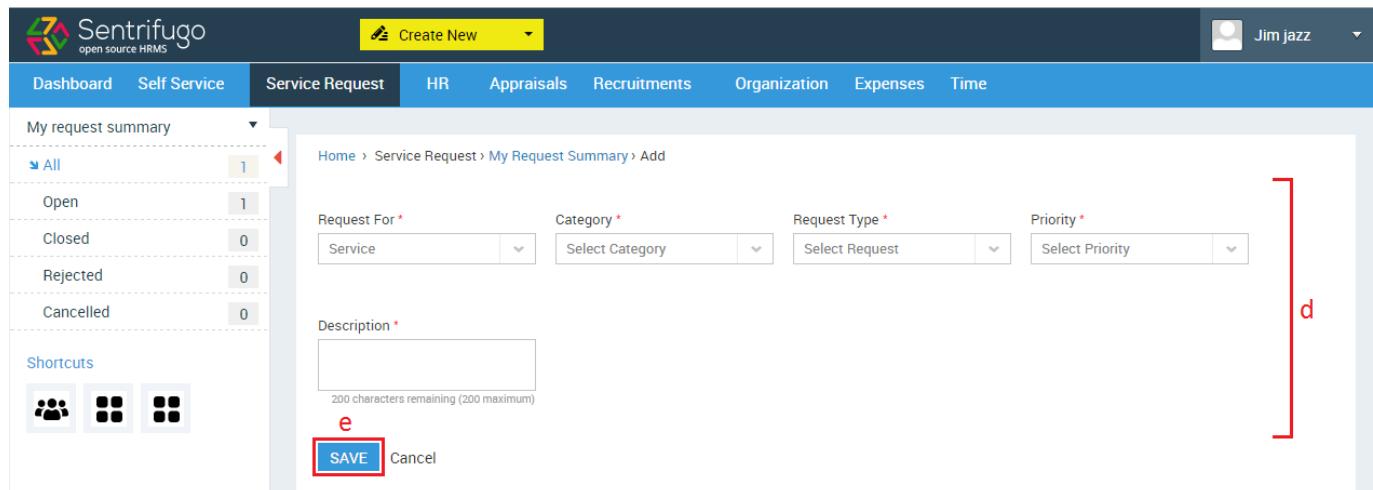


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request (which is highlighted with a red box), HR, Appraisals, Recruitments, Organization, Expenses, and Time. A user profile for 'Jim jazz' is visible on the right. The main content area has a sidebar on the left with a 'My request summary' section containing a table of request status counts: All (1 Open), Closed (0), Rejected (0), and Cancelled (0). The main panel displays a table titled 'My request summary' with columns: Ticket#, Request For, Category, Request Type/Asset Name, Priority, Description, Raised By, Raised On, and Status. One row is shown: SD0001, Service, Internet, Change, High, Tst, Jim jazz, 09/07/2016, Open. There are also 'Raise a Request' and search/filter buttons. Red labels 'a', 'b', and 'c' are overlaid on the screenshot to indicate specific UI elements.

Figure 79

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

Please refer Figure 80



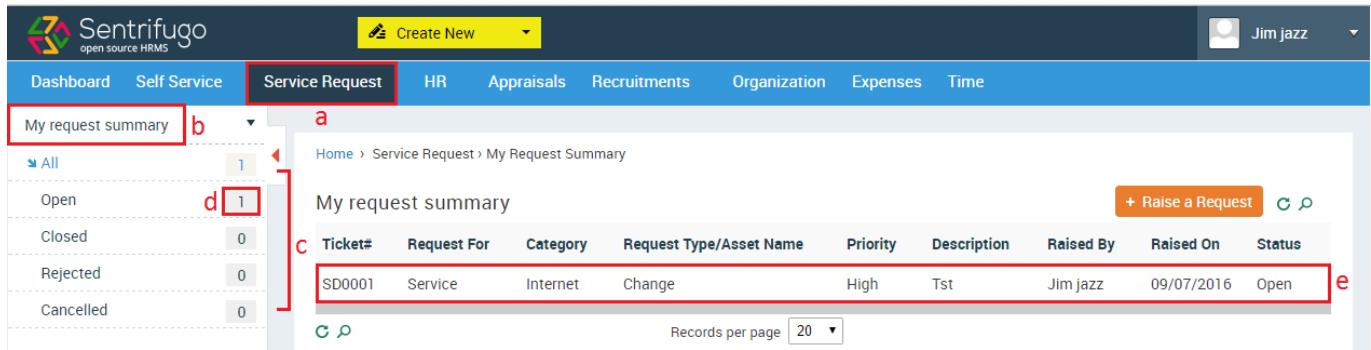
The screenshot shows the Sentrifugo HRMS interface with the 'Service Request' tab selected. The left sidebar includes 'My request summary' (with status counts), 'Shortcuts' (represented by icons), and a 'Create New' button. The main panel shows a 'My Request Summary > Add' page. It contains fields for 'Request For' (Service), 'Category' (Select Category), 'Request Type' (Select Request), and 'Priority' (Select Priority). Below these is a 'Description' field with a character limit of 200. At the bottom are 'SAVE' and 'Cancel' buttons. Red labels 'd' and 'e' are overlaid on the screenshot to indicate specific UI elements.

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



Status	Count
All	1
Open	1
Closed	0
Rejected	0
Cancelled	0

The ticket list shows one entry:

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

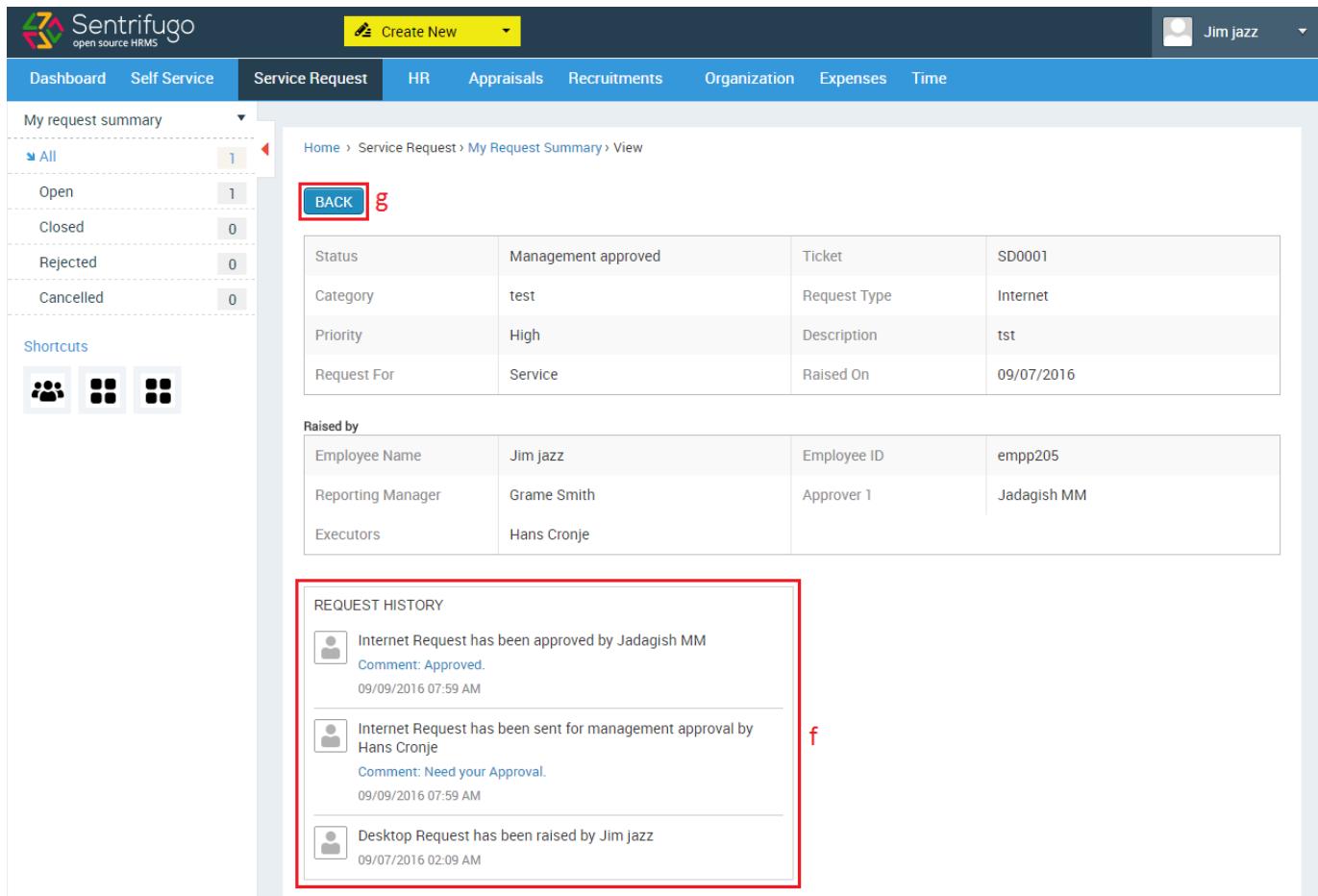
- a. Click **Service Request** in the top menu
- b. Click **My request summary** on the left menu panel

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 HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request (which is highlighted in blue), HR, Appraisals, Recruitments, Organization, Expenses, and Time. A user profile for 'Jim Jazz' is shown on the right. The main content area is titled 'My request summary'. On the left, there's a sidebar with 'All' status filters (Open: 1, Closed: 0, Rejected: 0, Cancelled: 0) and a 'Shortcuts' section with three icons. The main grid displays request details: Status (Management approved), Category (test), Priority (High), Request For (Service), Ticket (SD0001), Request Type (Internet), Description (tst), and Raised On (09/07/2016). Below this is a 'Raised by' section showing Employee Name (Jim jazz), Reporting Manager (Grame Smith), and Executors (Hans Cronje). The bottom section, enclosed in a red box 'f', is titled 'REQUEST HISTORY' and lists 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 'g' highlights the 'BACK' button in the top-left corner of the main content area.

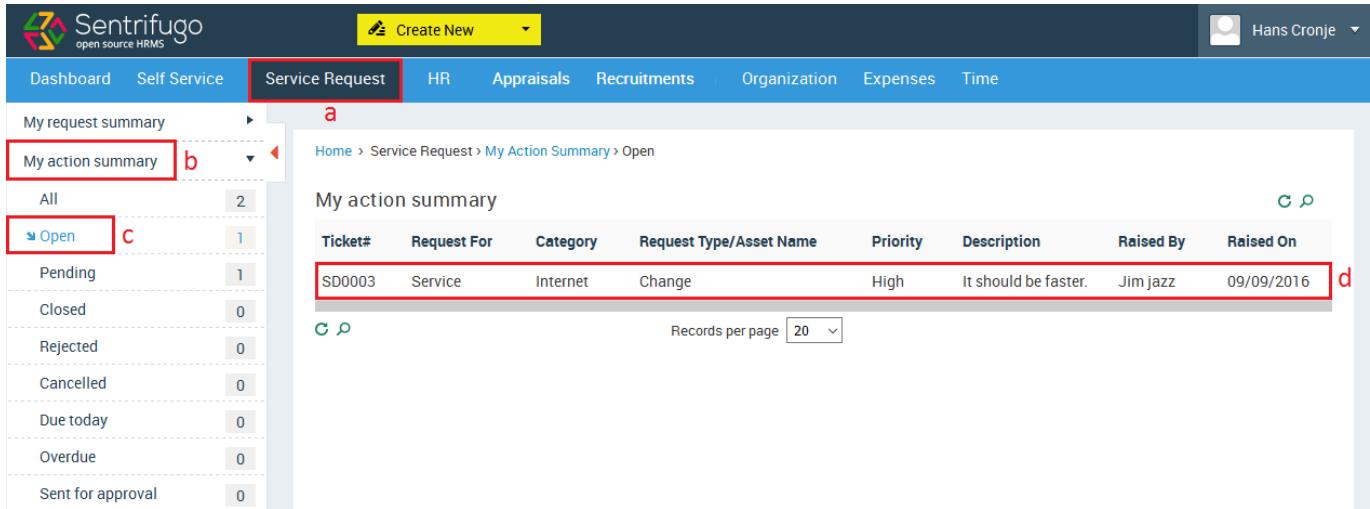
Figure 82

- 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. The top navigation bar includes links for Dashboard, Self Service, Service Request (which is highlighted), HR, Appraisals, Recruitments, Organization, Expenses, and Time. A 'Create New' button and a user profile for 'Hans Cronje' are also present. The main content area has a breadcrumb path: Home > Service Request > My Action Summary > Open. The left sidebar displays 'My request summary' and 'My action summary' sections. The 'My action summary' section is expanded, showing a table with one record:

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

Annotations with red numbers: 'a' points to the 'Service Request' menu item; 'b' points to the 'My action summary' link in the sidebar; 'c' points to the 'Open' link in the submenu; and 'd' points to the ticket record in the table.

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

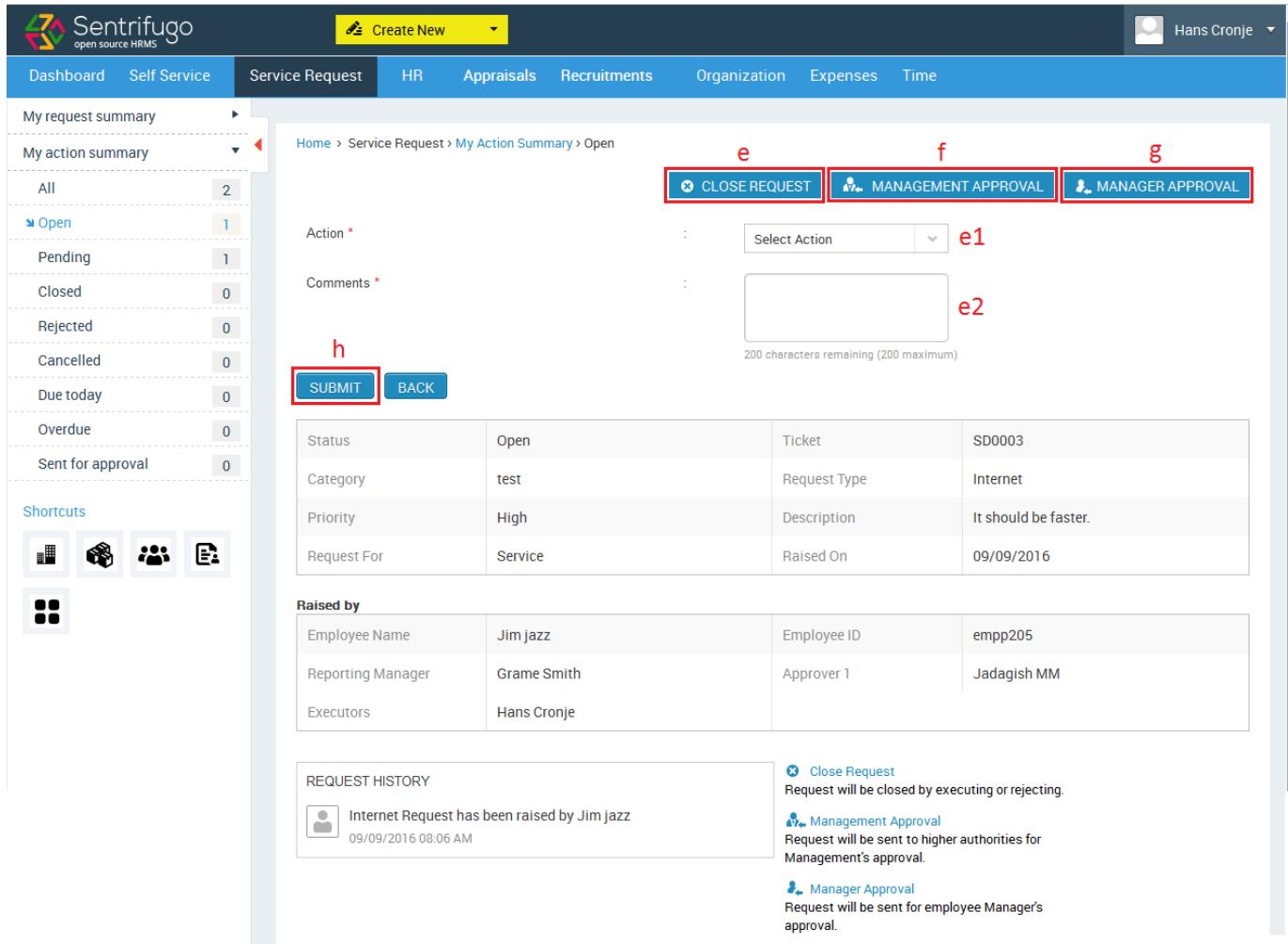


Figure 84

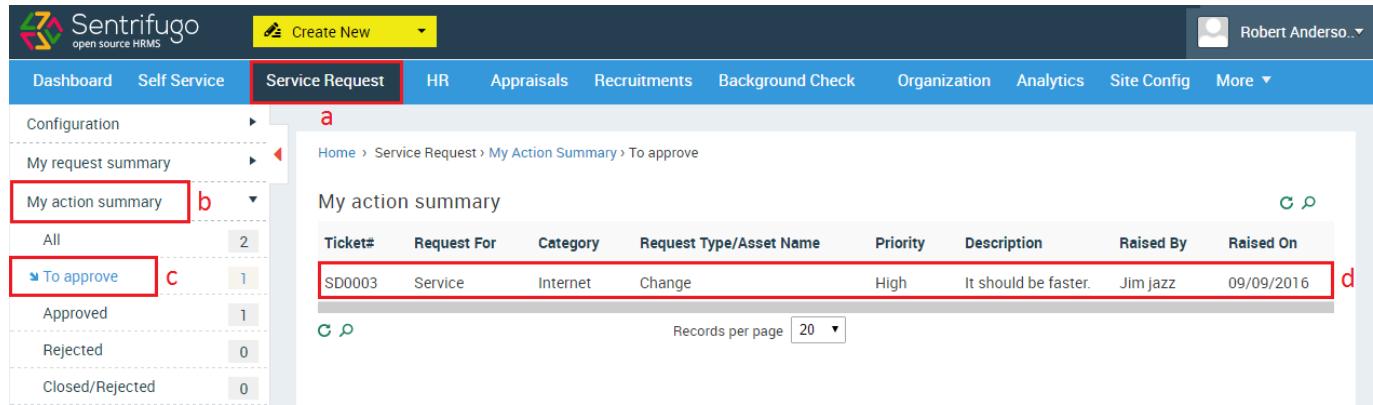
- e. Click **Close request** button to approve/reject the request.
 - e1. Select an action (Approve/Reject)
 - e2. Provide comments.
- f. Request **Management Approval** for the service request (They will be the approver(s) selected while configuring the Service Request Settings)
- g. Request **Manager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

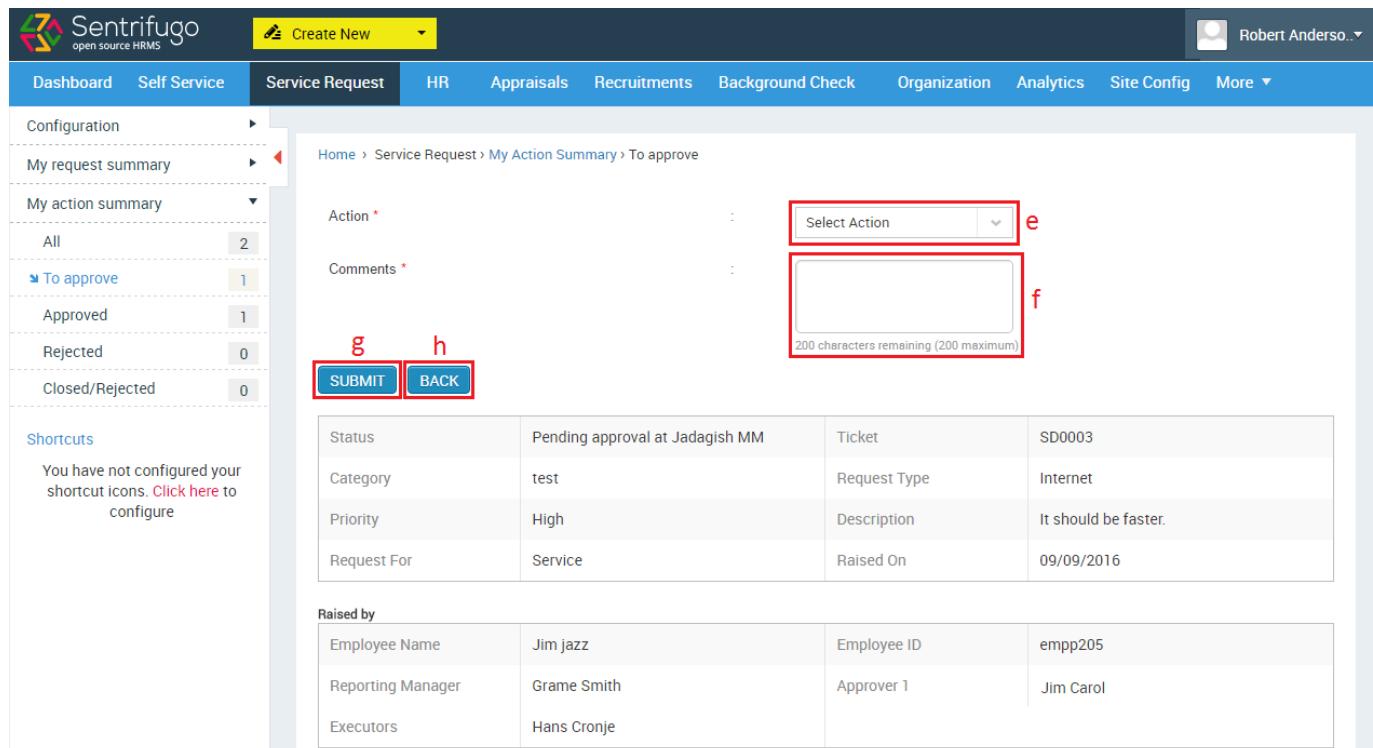


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New' and a user profile for 'Robert Anderso..'. The main menu has items like Dashboard, Self Service, Service Request (which is highlighted with a red box), HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, there's a sidebar with Configuration, My request summary, and My action summary (which is expanded, showing All, To approve, Approved, Rejected, and Closed/Rejected). The main content area shows a breadcrumb path: Home > Service Request > My Action Summary > To approve. It displays a table titled 'My action summary' with columns: Ticket#, Request For, Category, Request Type/Asset Name, Priority, Description, Raised By, and Raised On. One row is selected, highlighted with a red box, showing SD0003, Service, Internet, Change, High priority, 'It should be faster.' description, Jim jazz raised by, and 09/09/2016 raised on.

Figure 85

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

Please refer Figure 86



This screenshot shows the 'To approve' detail view from Figure 85. The left sidebar remains the same. The main content area shows a breadcrumb path: Home > Service Request > My Action Summary > To approve. It has fields for 'Action *' (with a red box around the dropdown menu) and 'Comments *' (with a red box around the text area, which says '200 characters remaining (200 maximum)'). At the bottom are 'SUBMIT' and 'BACK' buttons (both highlighted with red boxes). Below these are two tables: 'Status' (Pending approval at Jadagish MM, Ticket SD0003, Request Type Internet, Description It should be faster.) and 'Raised by' (Employee Name Jim jazz, Employee ID empp205, Reporting Manager Grame Smith, Approver 1 Jim Carol, Executors Hans Cronje).

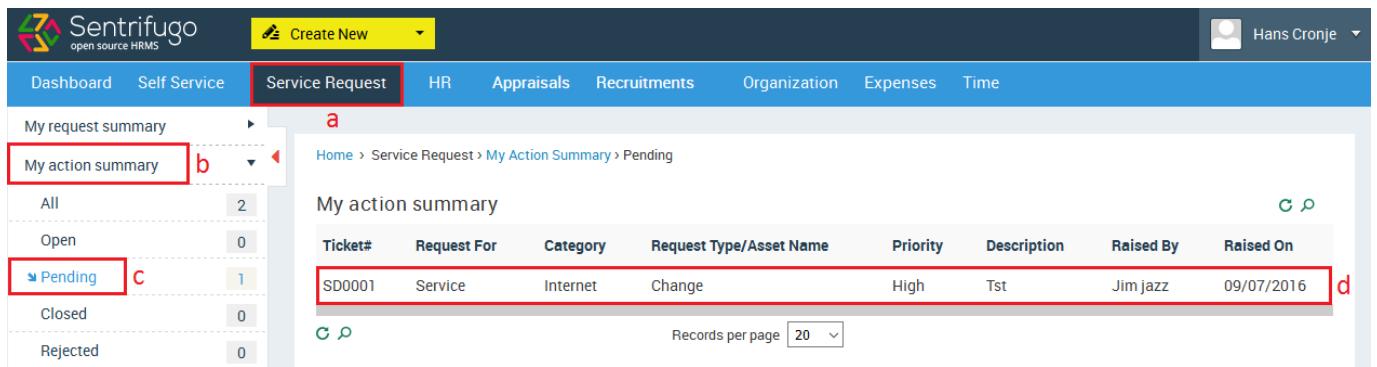
Figure 86

- 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 Service Request module. At the top, there's a navigation bar with links for Dashboard, Self Service, Service Request (which is highlighted), HR, Appraisals, Recruitments, Organization, Expenses, and Time. Below the navigation is a search bar labeled 'Create New' and a user profile for 'Hans Cronje'. On the left, there's a sidebar titled 'My request summary' with a dropdown menu. The 'Pending' option is highlighted with a red box and labeled 'c'. Under 'Pending', there's a count of 1. The main content area is titled 'My action summary' and shows a table of tickets. One ticket, SD0001, is highlighted with a red box and labeled 'd'. The ticket details are: Ticket# SD0001, Request For Service, Category Internet, Request Type/Asset Name Change, Priority High, Description Tst, Raised By Jim jazz, and Raised On 09/07/2016.

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

Figure 87

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

Please refer Figure 88

Sentrifugo open source HRMS

Create New ▾

Hans Cronje ▾

Dashboard Self Service Service Request HR Appraisals Recruitments Organization Expenses Time

My request summary ▾

My action summary ▾

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

Shortcuts




Action * : Select Action e

Comments * : f
200 characters remaining (200 maximum)

SUBMIT g BACK

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

Raised by

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

Figure 88

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

6. HR

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

6.1 Adding Employees

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

6.2 How do I manage Roles & Privileges?

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

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

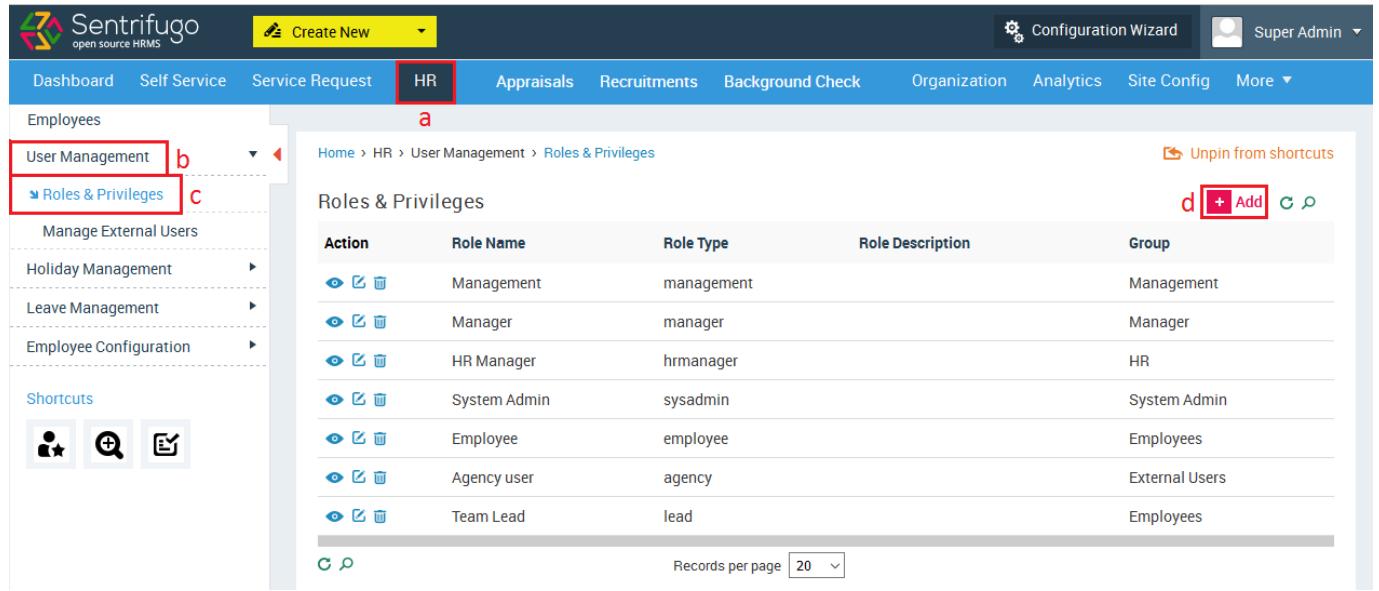
As mentioned earlier in section [1.1 What are the roles available in Sentrifugo?](#), there are 6 main role groups available by default in Sentrifugo:

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

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

To create a new role:

Please refer Figure 89

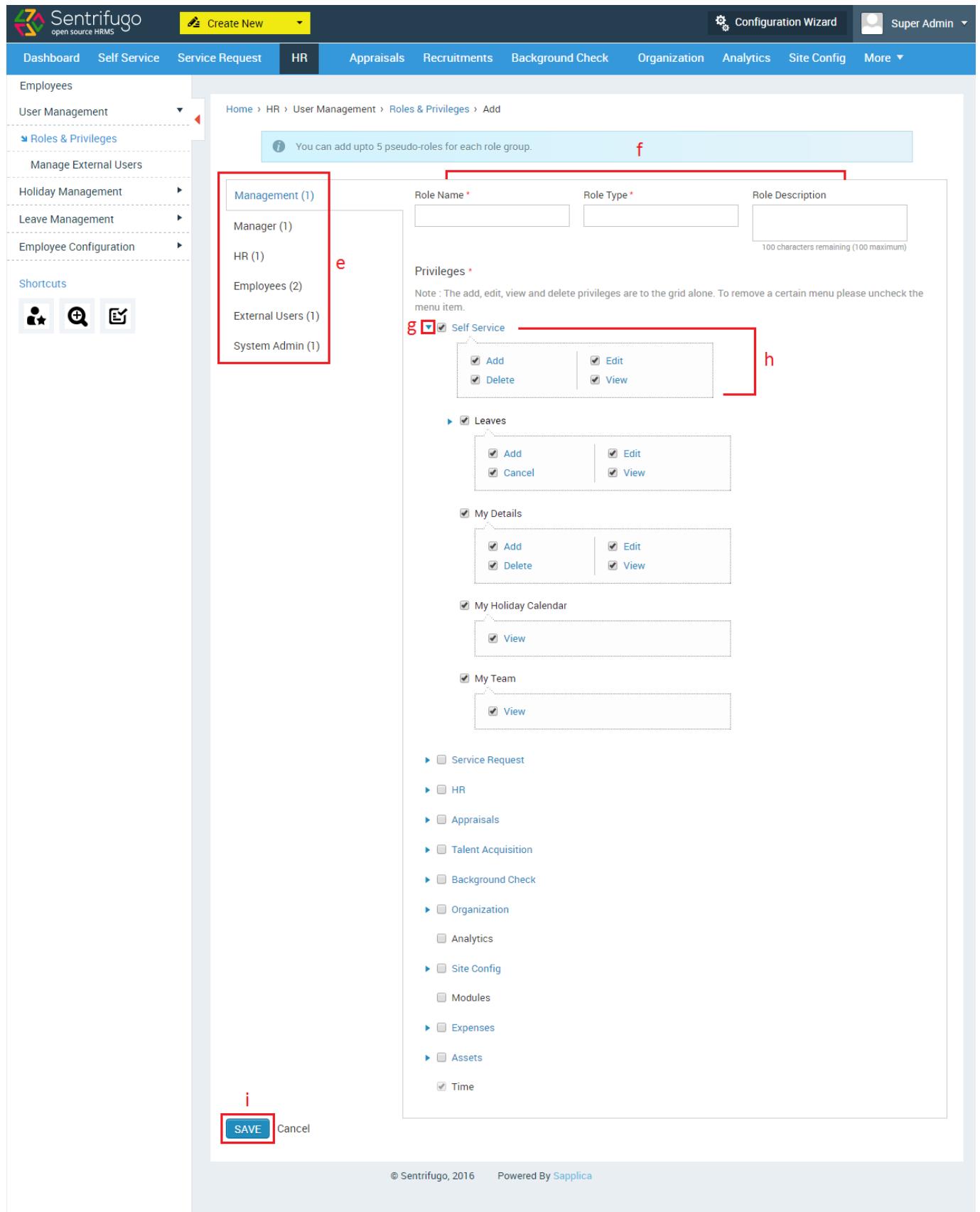


The screenshot shows the Sentrifugo open source HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (highlighted with a red box 'a'), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the far right, there's a Configuration Wizard icon, a Super Admin dropdown, and a user profile icon. The main content area has a breadcrumb trail: Home > HR > User Management > Roles & Privileges. To the left is a sidebar with sections for Employees (User Management, Roles & Privileges, Manage External Users, Holiday Management, Leave Management, Employee Configuration), Shortcuts (with icons for users, search, and export), and a pinned section with icons for users, search, and export. The main panel displays a table titled 'Roles & Privileges' with columns: Action, Role Name, Role Type, Role Description, and Group. The table lists seven roles: Management (management), Manager (manager), HR Manager (hrmanager), System Admin (sysadmin), Employee (employee), Agency user (agency), and Team Lead (lead). Each row has edit and delete icons in the Action column. At the bottom of the table are filters (eye, magnifying glass, trash), a records per page dropdown set to 20, and a search bar. On the right side of the table, there are buttons for Unpin from shortcuts, a +Add button (highlighted with a red box 'd'), and a refresh/circular arrow icon.

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



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

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

Management (1)

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

Role Name * **Role Type *** **Role Description**
100 characters remaining (100 maximum)

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

Self Service

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

Leaves

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

My Details

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

My Holiday Calendar

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

My Team

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

Service Request

HR

Appraisals

Talent Acquisition

Background Check

Organization

Analytics

Site Config

Modules

Expenses

Assets

Time

SAVE Cancel

Figure 90

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

6.3 How do I add External Users?

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

- Background Check Agency Users
- Recruitment 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

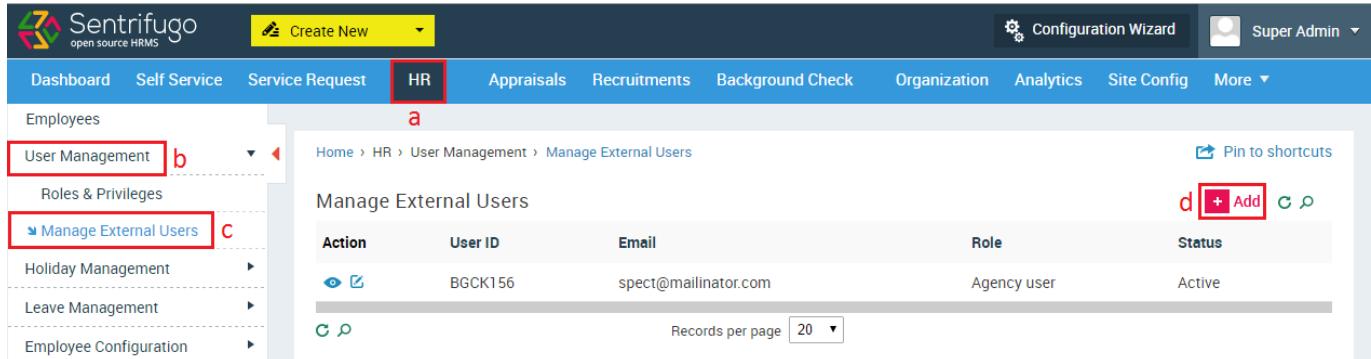


Figure 91

- 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

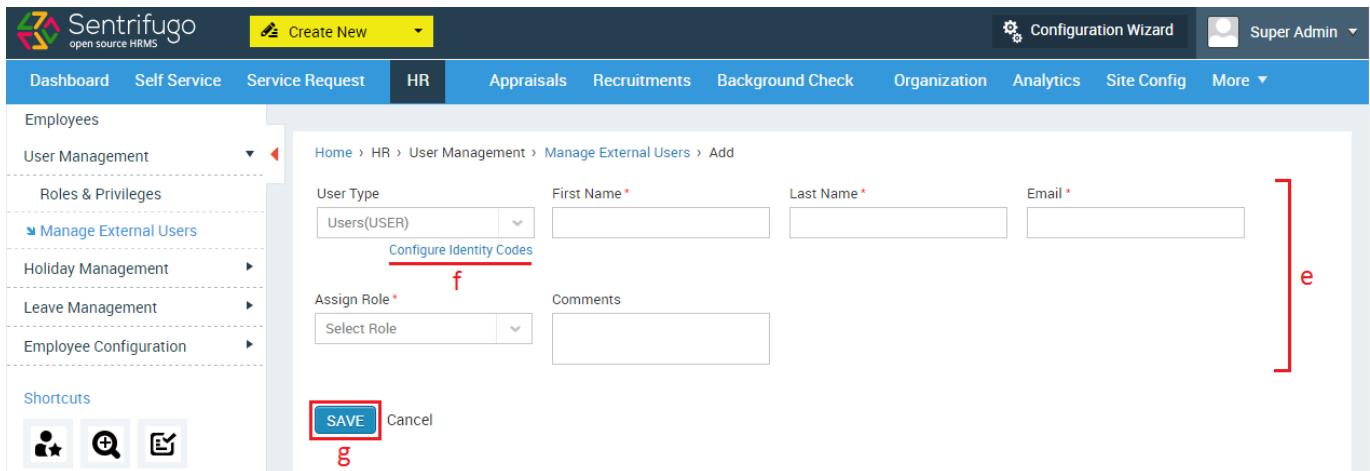


Figure 92

- 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

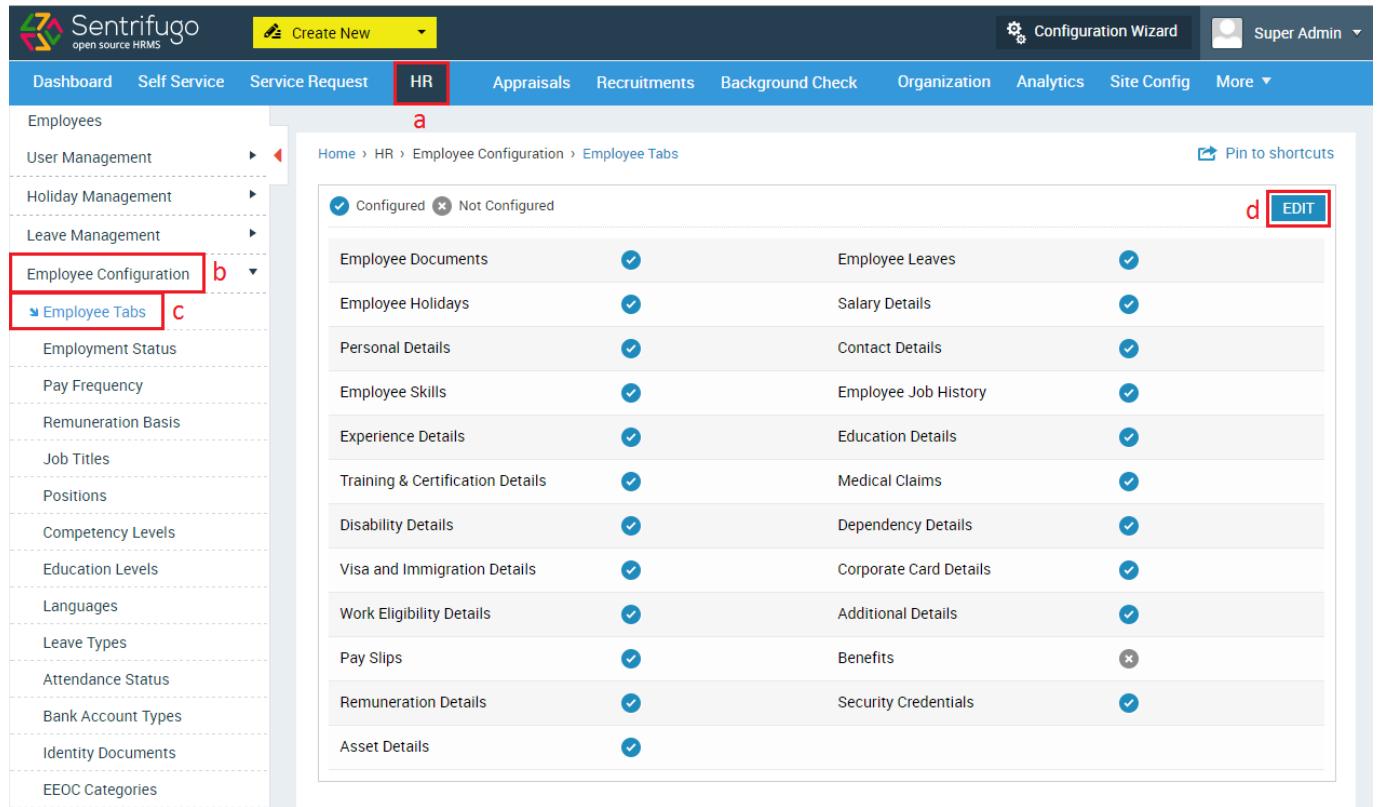
Please refer section [3. Leave Management](#)

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

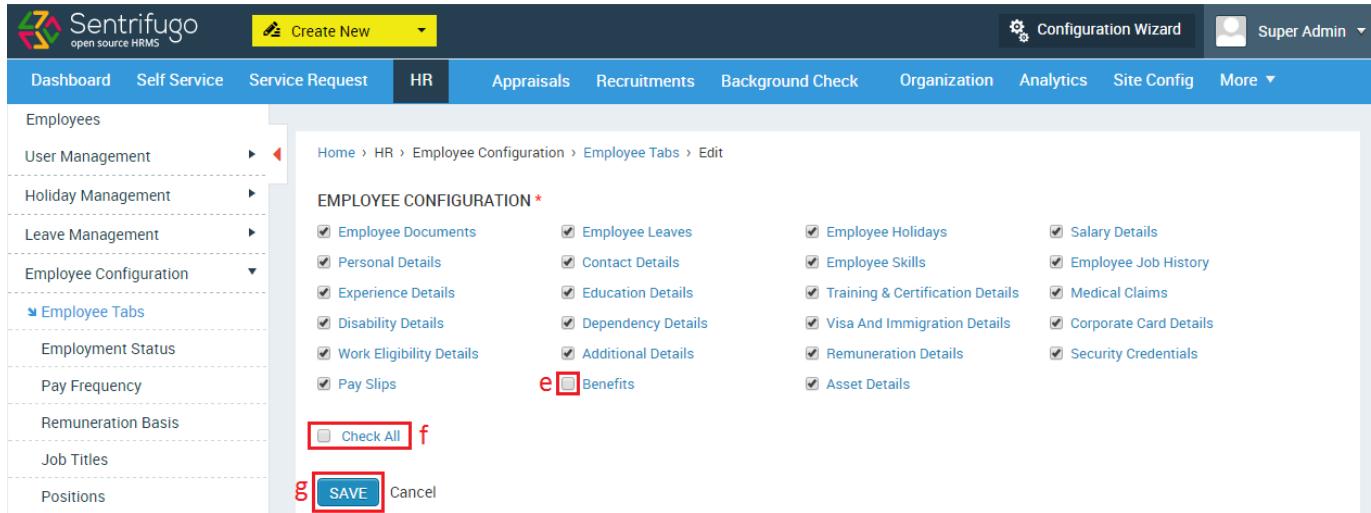


	Configured	Not Configured
Employee Documents	✓	✗
Employee Leaves	✓	✗
Employee Holidays	✓	✗
Salary Details	✓	✗
Personal Details	✓	✗
Contact Details	✓	✗
Employee Skills	✓	✗
Employee Job History	✓	✗
Experience Details	✓	✗
Education Details	✓	✗
Training & Certification Details	✓	✗
Medical Claims	✓	✗
Disability Details	✓	✗
Dependency Details	✓	✗
Visa and Immigration Details	✓	✗
Corporate Card Details	✓	✗
Work Eligibility Details	✓	✗
Additional Details	✓	✗
Pay Slips	✓	✗
Benefits	✓	✗
Remuneration Details	✓	✗
Security Credentials	✓	✗
Asset Details	✓	✗

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



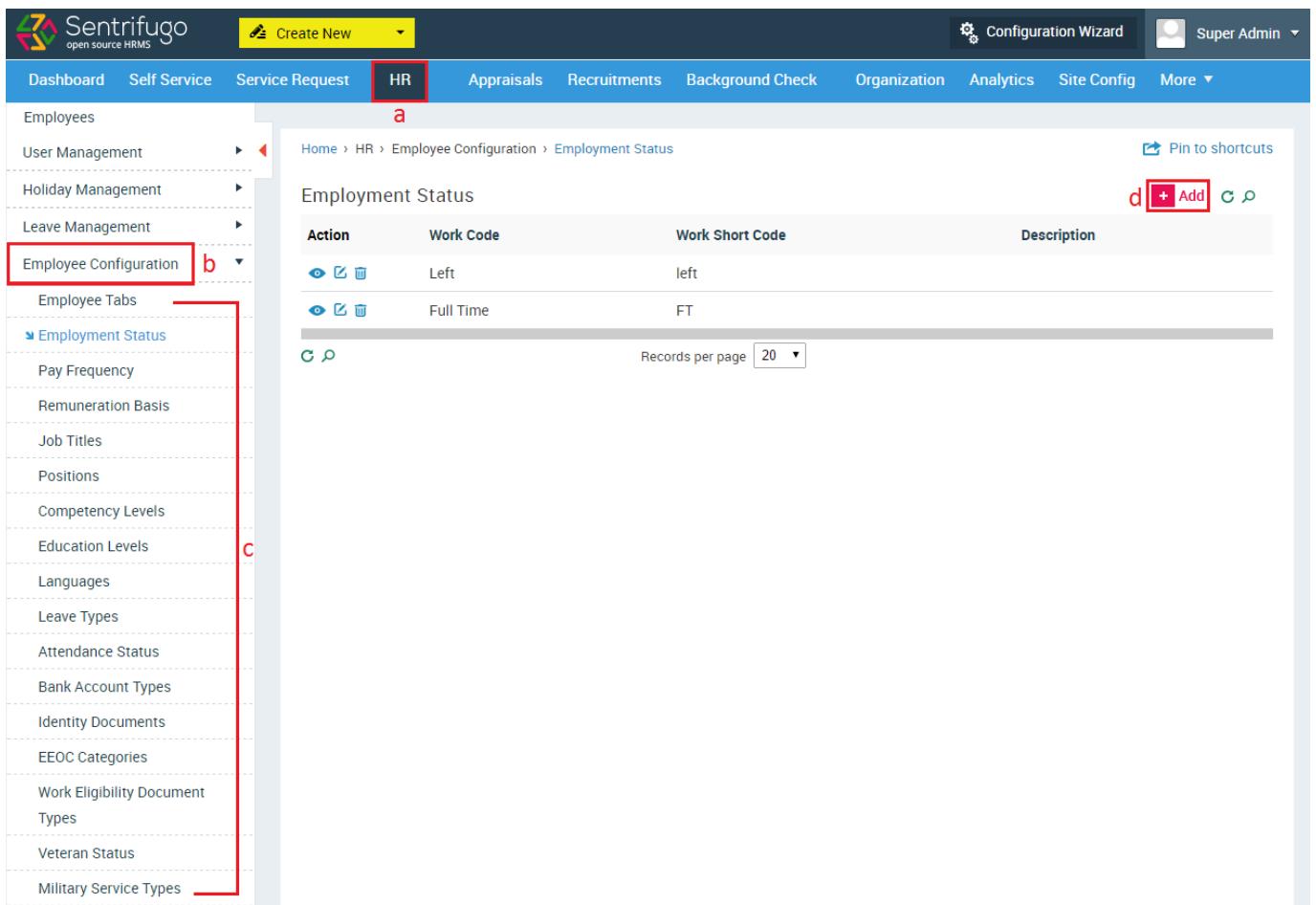
The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes the logo, a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. The main menu has tabs for Dashboard, Self Service, Service Request, HR (which is selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar under 'Employees' lists User Management, Holiday Management, Leave Management, Employee Configuration (with 'Employee Tabs' expanded), Employment Status, Pay Frequency, Remuneration Basis, Job Titles, and Positions. The central content area is titled 'EMPLOYEE CONFIGURATION *'. It displays a grid of checkboxes for various employee details, grouped into four columns. A red box labeled 'e' surrounds the 'Benefits' row, specifically the checkbox next to 'Benefits'. Below this row is a red box labeled 'f' containing the 'Check All' checkbox. At the bottom left is a red box labeled 'g' containing the blue 'SAVE' button, with a 'Cancel' link next to it.

Figure 94

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

6.6.2 How do I set Employee Configuration?

Please refer Figure 95

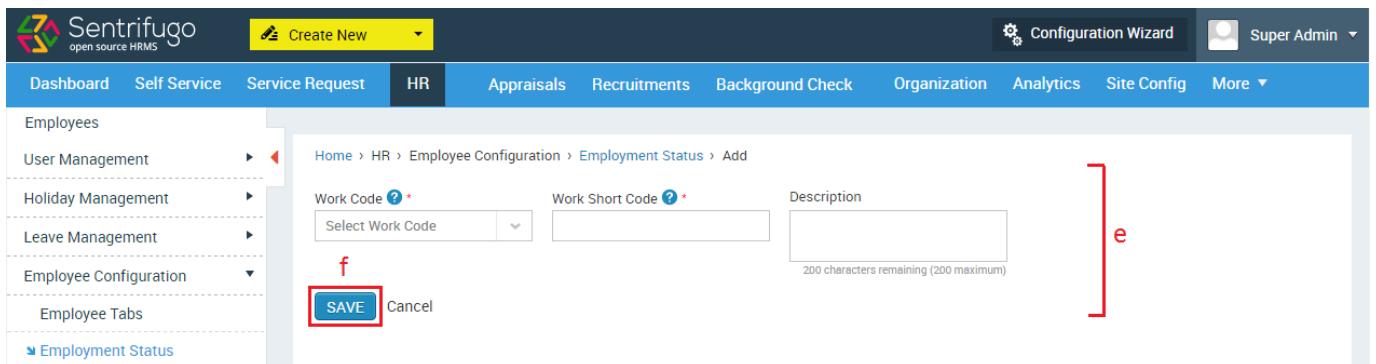


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, More, Configuration Wizard, and Super Admin. The left sidebar has a tree view with categories like Employees, User Management, Holiday Management, Leave Management, Employee Configuration (highlighted with a red box), Employee Tabs, Employment Status (selected and highlighted with a red box), Pay Frequency, Remuneration Basis, Job Titles, Positions, Competency Levels, Education Levels, Languages, Leave Types, Attendance Status, Bank Account Types, Identity Documents, EEOC Categories, Work Eligibility Document Types, Veteran Status, and Military Service Types. The main content area displays the 'Employment Status' configuration page with a table showing two rows: 'Left' (Work Code) and 'FT' (Work Short Code). A red bracket labeled 'a' points to the 'HR' menu item. A red bracket labeled 'b' points to the 'Employee Configuration' item in the sidebar. A red bracket labeled 'c' points to the 'Employment Status' item in the sidebar. A red bracket labeled 'd' points to the '+Add' button in the top right of the main content area. A red bracket labeled 'e' points to the 'Description' field in the table row.

Figure 95

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

Please refer Figure 96



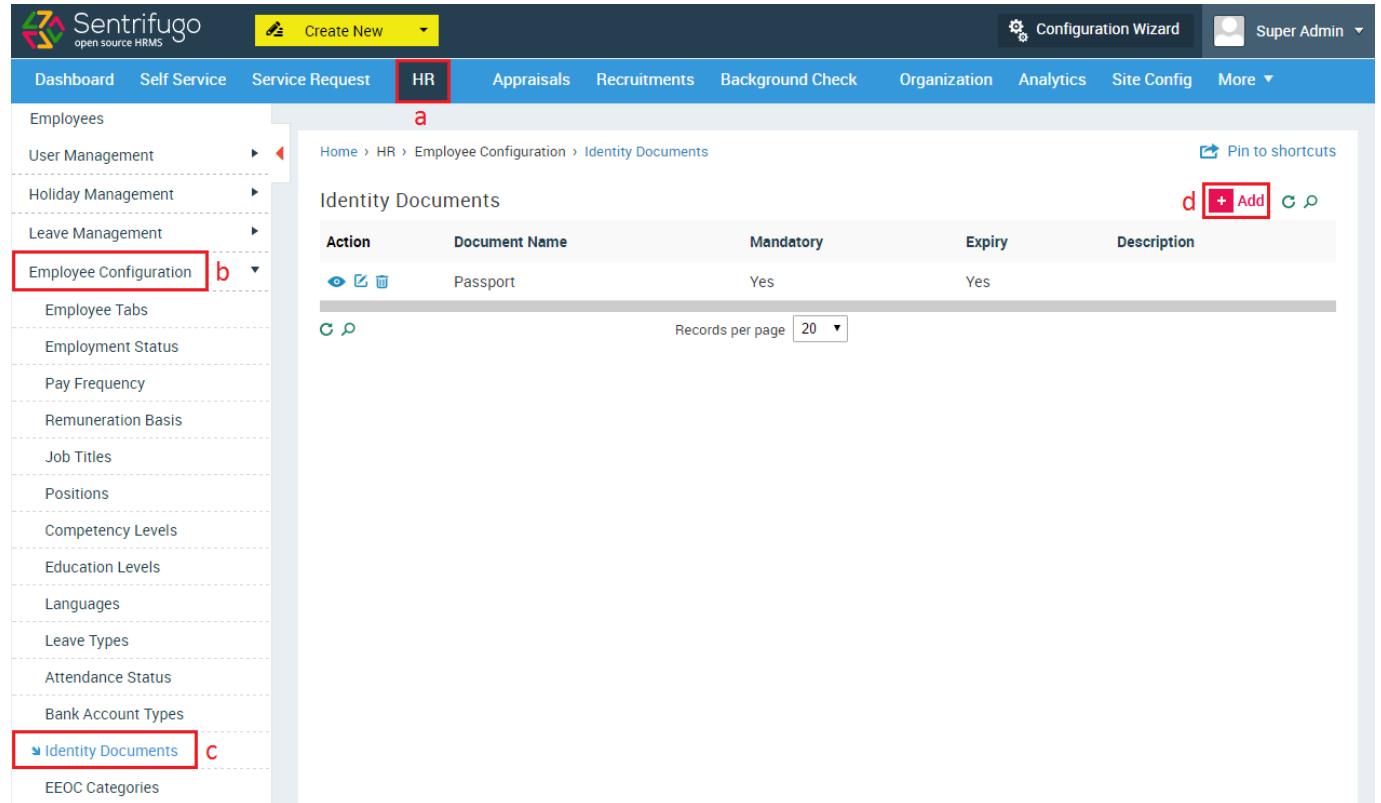
The screenshot shows the 'Add' page for 'Employment Status'. The top navigation bar and sidebar are identical to Figure 95. The main content area shows a form with fields for 'Work Code' (with a question mark icon and a required asterisk), 'Work Short Code' (with a question mark icon and a required asterisk), and 'Description' (with a text input field and a note '200 characters remaining (200 maximum)'). At the bottom are 'SAVE' and 'Cancel' buttons. A red bracket labeled 'f' points to the 'SAVE' button. A red bracket labeled 'e' points to the 'Description' field.

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

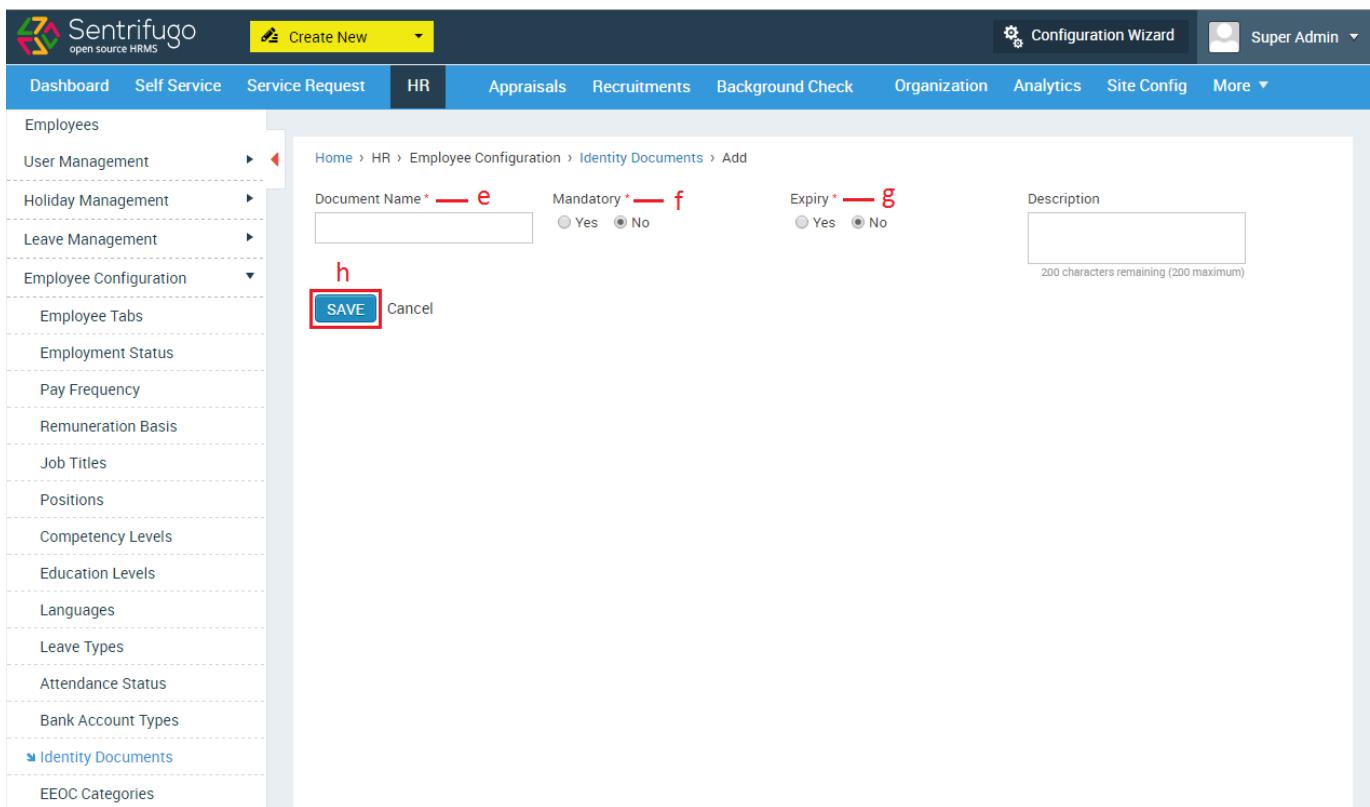


Action	Document Name	Mandatory	Expiry	Description
	Passport	Yes	Yes	

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 open source HRMS application 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 (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists various HR modules like Employees, User Management, Holiday Management, Leave Management, Employee Configuration, etc. The central content area shows a 'Home > HR > Employee Configuration > Identity Documents > Add' path. It contains fields for 'Document Name' (marked e), 'Mandatory' (marked f), 'Expiry' (marked g), and a 'Description' text area with a character limit of 200. A red box highlights the 'SAVE' button. Below the form, there are 'Cancel' and 'Save' buttons.

Figure 98

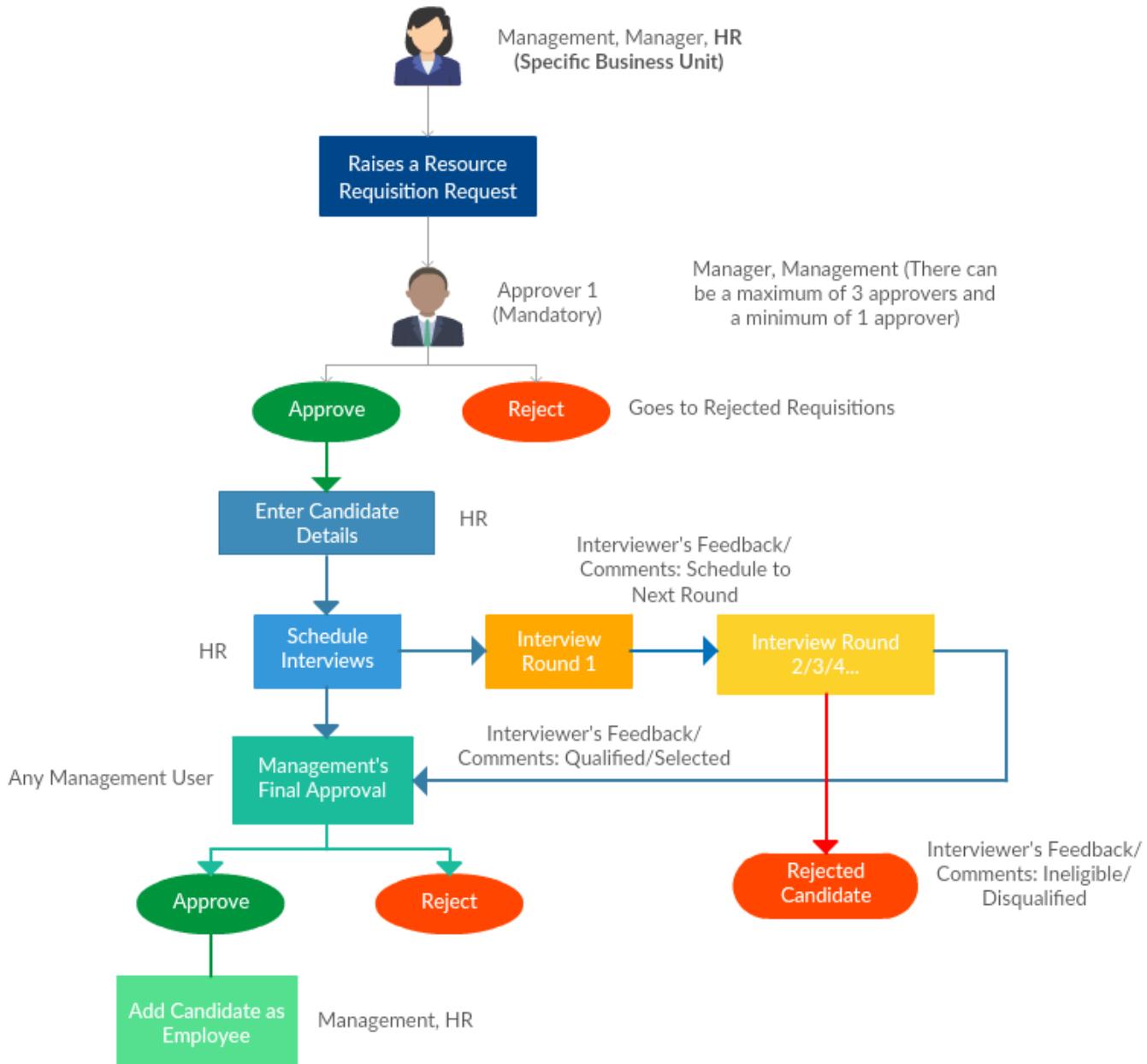
- e. Enter document name
- f. Select if you require a document to be mandatory or not
- g. Select if documents needs to have an expiry date
- h. Click **SAVE** button



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

7. Recruitments

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

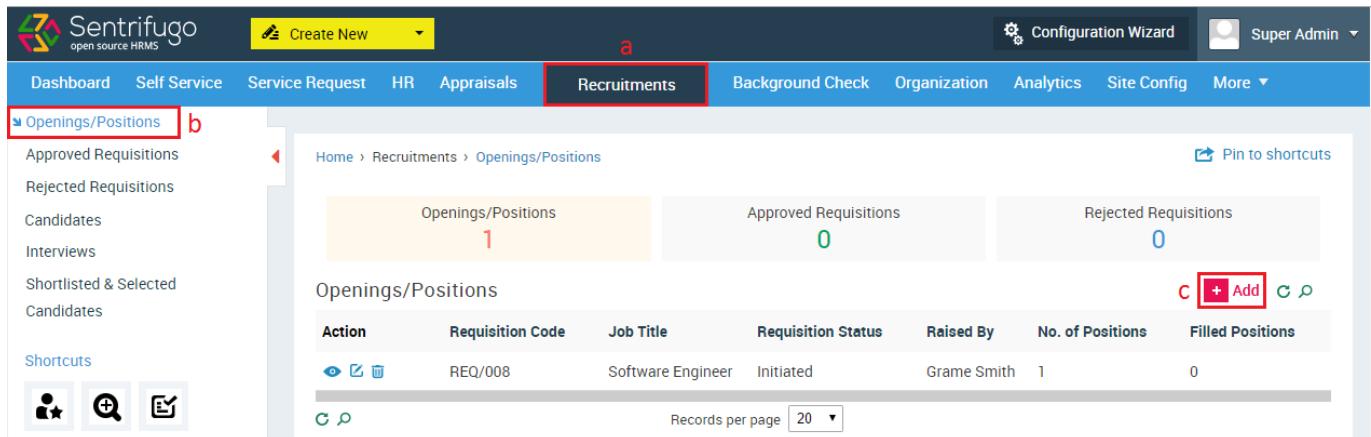


Description:

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

7.1 How do I create a Job Requisition/Opening?

Please refer Figure 99

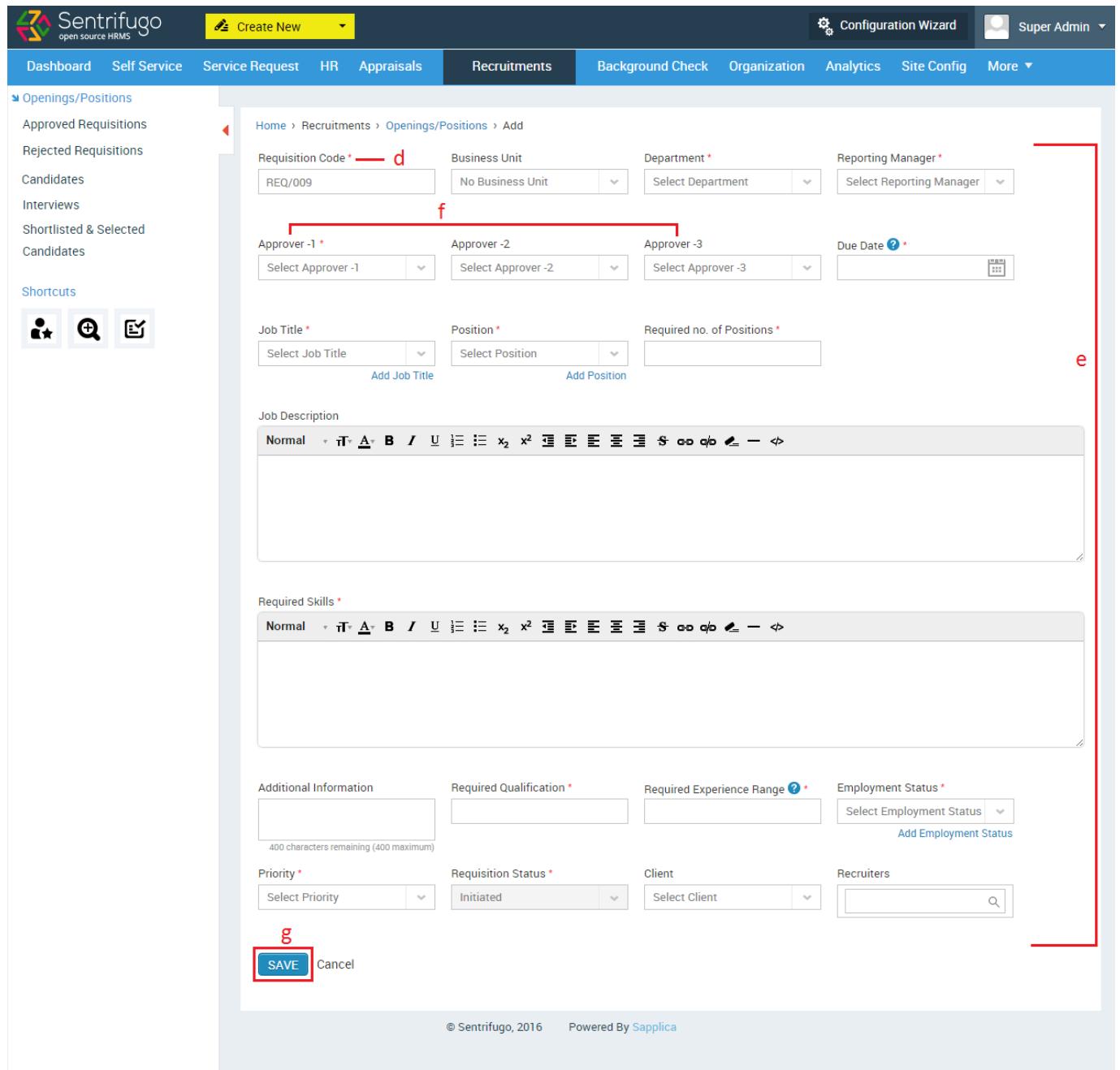


Action	Requisition Code	Job Title	Requisition Status	Raised By	No. of Positions	Filled Positions
	REQ/008	Software Engineer	Initiated	Grame Smith	1	0

Figure 99

- Click **Recruitments** 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 'Recruitments' section of the Sentrifugo HRMS application. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (selected), Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists Openings/Positions, Approved Requisitions, Rejected Requisitions, Candidates, Interviews, Shortlisted & Selected Candidates, and Shortcuts. The main content area displays a form for adding a new opening. The form fields include:

- Requisition Code * **d**: REQ/009
- Business Unit: No Business Unit
- Department *: Select Department
- Reporting Manager *: Select Reporting Manager
- Approver -1 *: Select Approver -1
- Approver -2: Select Approver -2
- Approver -3: Select Approver -3
- Due Date *: [date input field]
- Job Title *: Select Job Title
- Position *: Select Position
- Required no. of Positions *: [input field]
- Job Description: Rich text editor with toolbar.
- Required Skills *: Rich text editor with toolbar.
- Additional Information: Text area with character count indicator (400 characters remaining / 400 maximum).
- Required Qualification *: Text area.
- Required Experience Range *: Text area.
- Employment Status *: Select Employment Status
- Add Employment Status
- Priority *: Select Priority
- Requisition Status *: Initiated
- Client: Select Client
- Recruiters: Search input field

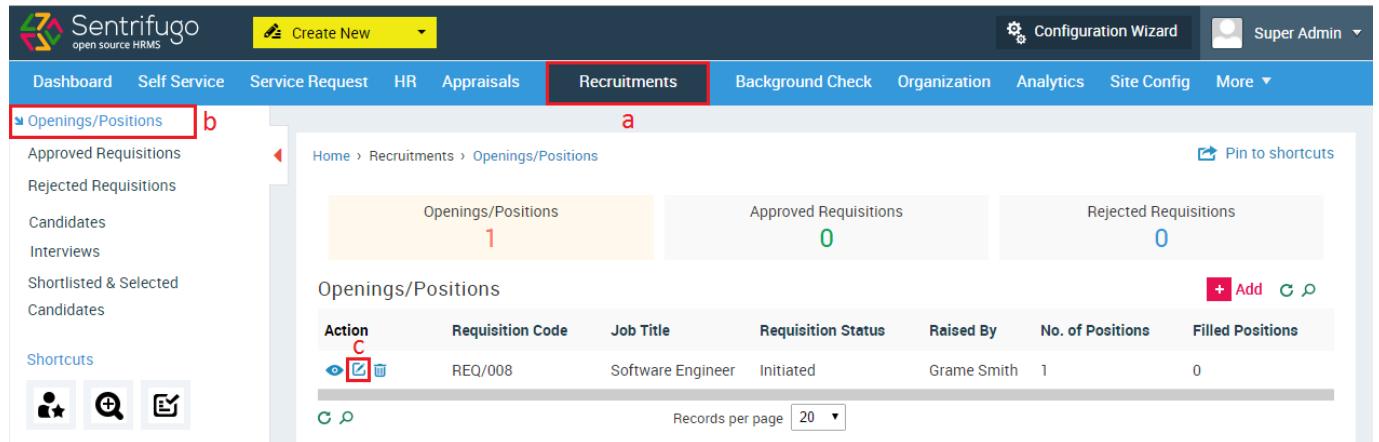
At the bottom, there are 'SAVE' and 'Cancel' buttons, with the 'SAVE' button highlighted by a red box labeled 'g'.

Figure 100

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

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

Please refer Figure 101

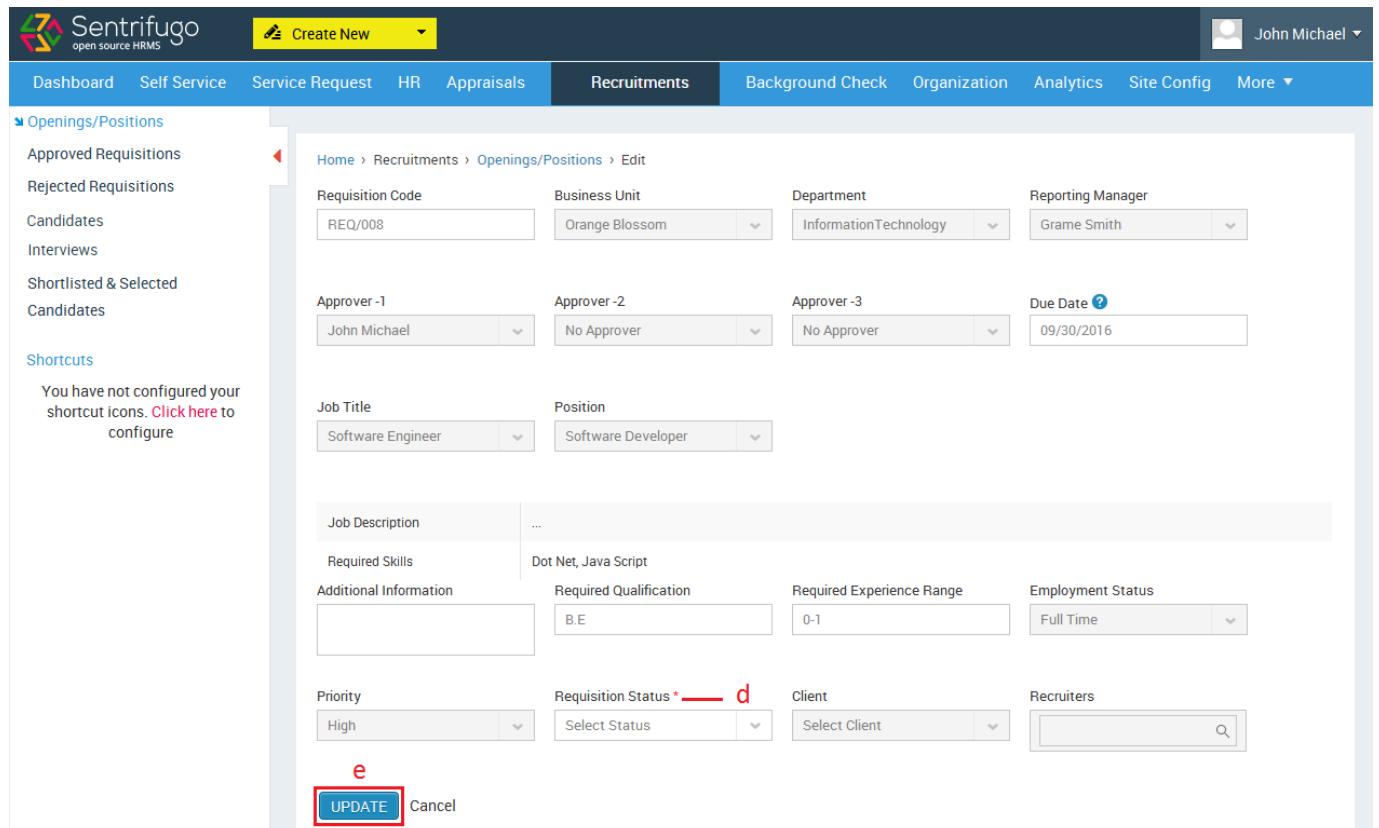


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Configuration Wizard', 'Super Admin', and other tabs like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (which is highlighted with a red box), Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar has 'Openings/Positions' (highlighted with a red box and labeled 'b') and other options like Approved Requisitions, Rejected Requisitions, Candidates, Interviews, Shortlisted & Selected Candidates, and Shortcuts. The main content area shows a summary of Openings/Positions (1), Approved Requisitions (0), and Rejected Requisitions (0). Below is a table of Openings/Positions with columns: Action (with an edit icon highlighted with a red box and labeled 'c'), Requisition Code (REQ/008), Job Title (Software Engineer), Requisition Status (Initiated), Raised By (Grame Smith), No. of Positions (1), and Filled Positions (0). There are also 'Add' and search/filter icons.

Figure 101

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

Please refer Figure 102



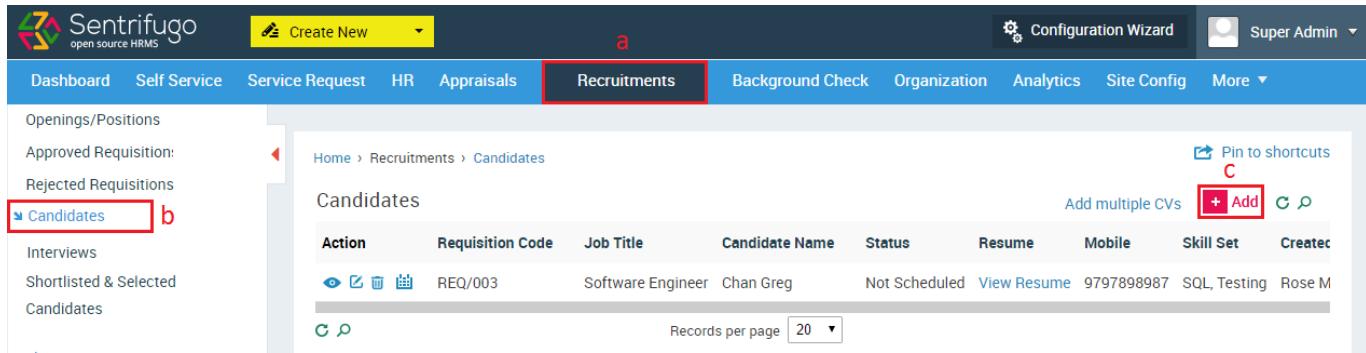
The screenshot shows the 'Edit' view for a requisition. The top navigation bar includes 'Create New', 'John Michael', and other tabs like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (selected), Background Check, Organization, Analytics, Site Config, and More. The left sidebar has 'Openings/Positions' and other options. The main content area shows a form for 'Edit'. It includes fields for Requisition Code (REQ/008), Business Unit (Orange Blossom), Department (InformationTechnology), Reporting Manager (Grame Smith), Approver -1 (John Michael), Approver -2 (No Approver), Approver -3 (No Approver), Due Date (09/30/2016), Job Title (Software Engineer), Position (Software Developer), Job Description (ellipsis), Required Skills (Dot Net, Java Script), Additional Information (B.E.), Required Qualification (B.E.), Required Experience Range (0-1), Employment Status (Full Time), Priority (High), Requisition Status (highlighted with a red box and labeled 'd'), Client (Select Client), Recruiters (Search bar), and buttons for 'UPDATE' (highlighted with a red box and labeled 'e') and 'Cancel'.

Figure 102

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

7.3 How do I enter a Candidate's details?

Please refer Figure 103

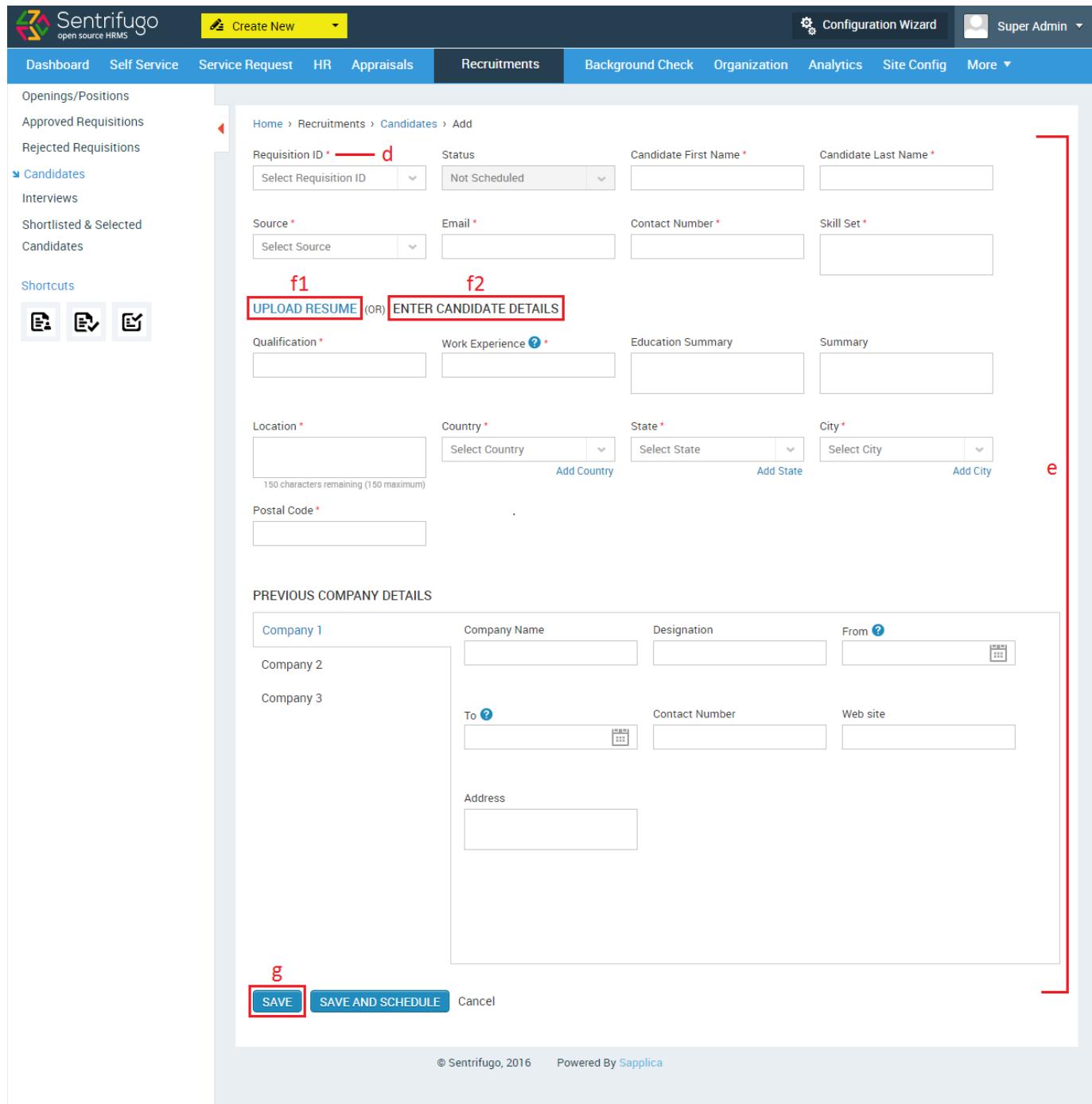


The screenshot shows the Sentrifugo web application interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (which is highlighted with a red box 'a'), Background Check, Organization, Analytics, Site Config, and More. On the far left, a sidebar lists Openings/Positions, Approved Requisition, Rejected Requisitions, Candidates (which is highlighted with a red box 'b'), Interviews, Shortlisted & Selected Candidates, and others. In the center, under the 'Recruitments' tab, is a 'Candidates' list page. The page header includes a breadcrumb trail (Home > Recruitments > Candidates), a 'Pin to shortcuts' link, and a '+ Add' button (highlighted with a red box 'c'). The main table displays columns for Action, Requisition Code, Job Title, Candidate Name, Status, Resume, Mobile, Skill Set, and Created. A single row is shown for a candidate named 'Chan Greg' with details: REQ/003, Software Engineer, Not Scheduled, 9797898987, SQL, Testing, and Rose M.

Figure 103

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

Please refer Figure 104



The screenshot shows the 'Candidates' add form in the Sentrifugo HRMS application. The interface is divided into several sections:

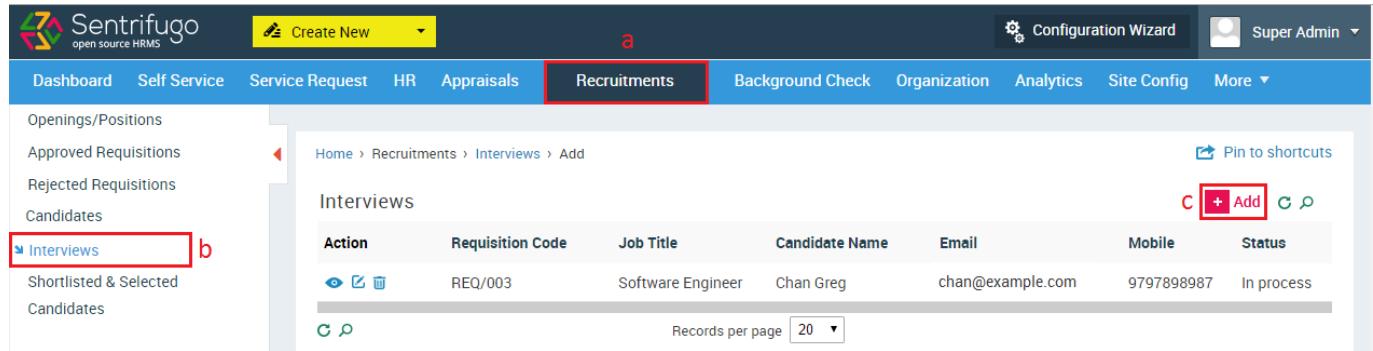
- Top Navigation:** Includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (selected), Background Check, Organization, Analytics, Site Config, and More.
- Left Sidebar:** Lists Openings/Positions, Approved Requisitions, Rejected Requisitions, Candidates (selected), Interviews, Shortlisted & Selected Candidates, and Shortcuts.
- Form Fields:**
 - Requisition ID * (marked with a red 'd') and Status (Not Scheduled).
 - Candidate First Name * and Candidate Last Name *.
 - Source * and Email *.
 - Contact Number * and Skill Set *.
 - A central section with Qualification *, Work Experience ? *, Education Summary, and Summary.
 - Location *, Country *, State *, and City *.
 - Postal Code *.
- Buttons and Links:**
 - f1** covers the 'UPLOAD RESUME' (OR) 'ENTER CANDIDATE DETAILS' area.
 - f2** covers the Qualification, Work Experience, Education Summary, and Summary fields.
 - e** covers the Location, Country, State, City, and Postal Code fields.
 - g** covers the 'SAVE' button.
- Previous Company Details:** A sidebar with fields for Company 1, Company 2, Company 3, To, Contact Number, Web site, and Address.
- Footer:** © Sentrifugo, 2016 | Powered By Sapplica

Figure 104

- d. Select the Requisition ID
 - e. Enter Candidate's name
 - f1. Click to upload resume
- Or**
- f2. Click here to enter candidate details in a form
 - g. Click **SAVE** button

7.4 How do I Schedule an Interview?

Please refer Figure 105

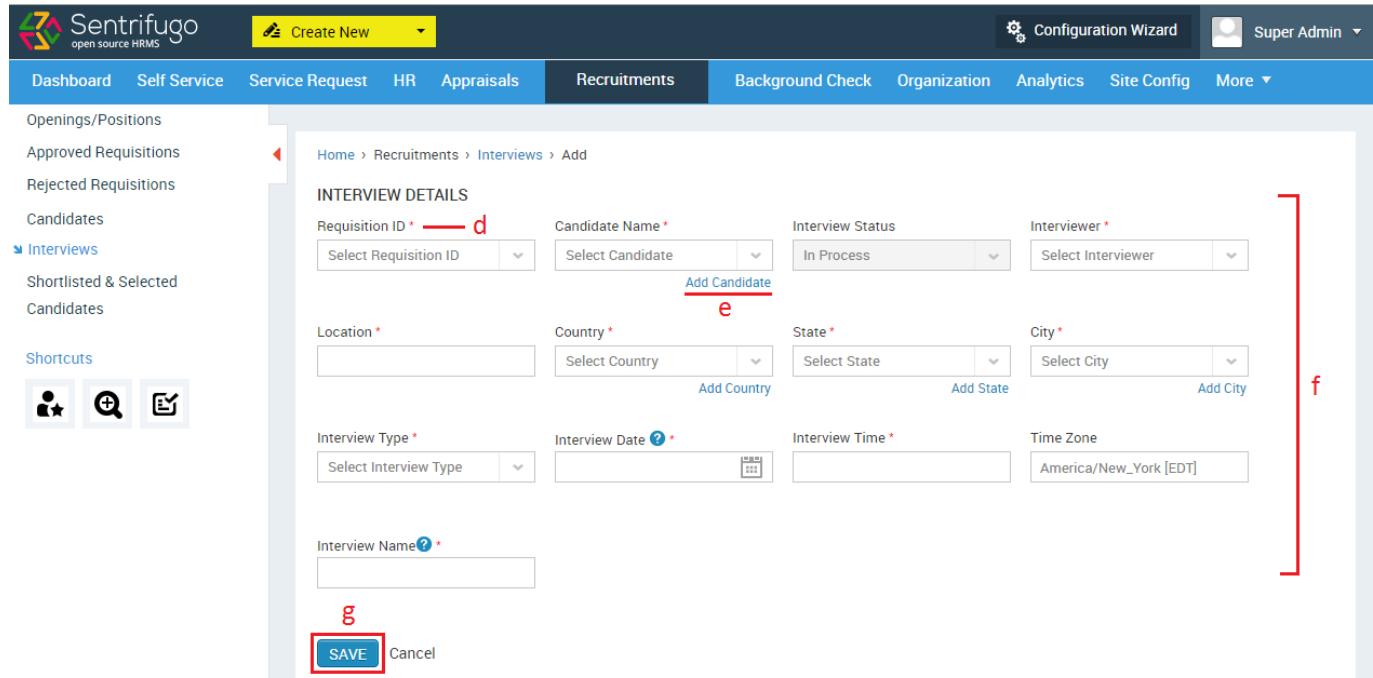


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New' (dropdown), 'Configuration Wizard', 'Super Admin' (dropdown), and tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (highlighted in red), Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists Openings/Positions, Approved Requisitions, Rejected Requisitions, Candidates, and Interviews (highlighted in red). The main content area shows a table for Interviews with columns: Action, Requisition Code, Job Title, Candidate Name, Email, Mobile, and Status. A new row is being added with values: REQ/003, Software Engineer, Chan Greg, chan@example.com, 9797898987, and In process. A red box labeled 'b' highlights the 'Interviews' link in the sidebar. A red box labeled 'c' highlights the '+Add' button in the top right of the main content area. A red box labeled 'a' highlights the 'Recruitments' tab in the top navigation.

Figure 105

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

Please refer Figure 106



The screenshot shows the 'INTERVIEW DETAILS' form for creating a new interview. The form fields include: Requisition ID (dropdown, highlighted in red with label 'd'), Candidate Name (dropdown), Interview Status (dropdown), Interviewer (dropdown), Location (dropdown), Country (dropdown), State (dropdown), City (dropdown), Interview Type (dropdown), Interview Date (calendar icon, highlighted in red with label 'e'), Interview Time (dropdown), Time Zone (dropdown), Interview Name (text input), and a 'SAVE' button (highlighted in red with label 'g'). A red bracket labeled 'f' spans from the 'Interviewer' field to the 'Time Zone' field. A red box labeled 'h' highlights the 'Cancel' button at the bottom left of the form.

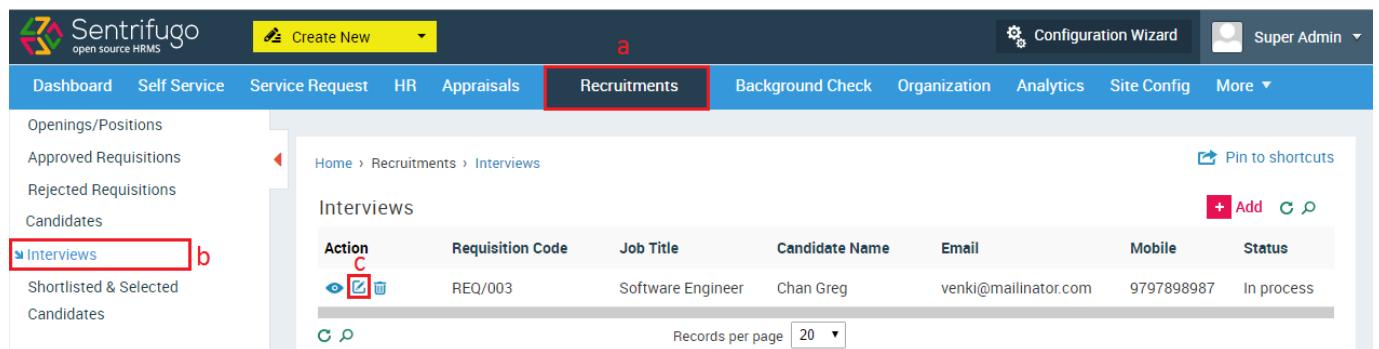
Figure 106

- 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

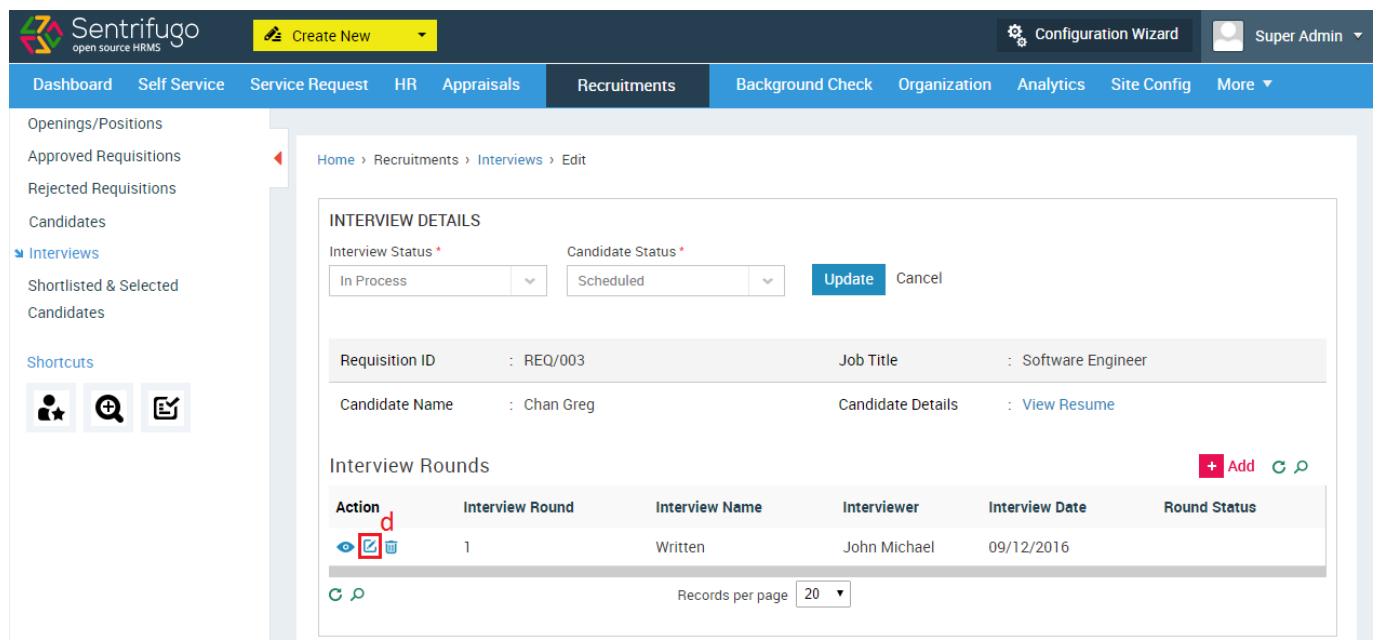


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New' (dropdown), 'Configuration Wizard', and 'Super Admin'. The main menu has tabs: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (which is highlighted with a red box), Background Check, Organization, Analytics, Site Config, and More. On the left sidebar, under 'Interviews' (also highlighted with a red box), there are links for Openings/Positions, Approved Requisitions, Rejected Requisitions, Candidates, and Shortlisted & Selected Candidates. The main content area shows a list of interviews with columns: Action, Requisition Code, Job Title, Candidate Name, Email, Mobile, and Status. One row is selected, indicated by a blue border and a checked edit icon. The status is 'In process'. At the bottom, there are buttons for 'Records per page' (set to 20) and 'C P'.

Figure 107

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

Please refer Figure 108



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New' (dropdown), 'Configuration Wizard', and 'Super Admin'. The main menu has tabs: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (highlighted), Background Check, Organization, Analytics, Site Config, and More. On the left sidebar, under 'Interviews', there are links for Openings/Positions, Approved Requisitions, Rejected Requisitions, Candidates, and Shortlisted & Selected Candidates. The main content area shows an 'INTERVIEW DETAILS' form with fields for Interview Status (In Process) and Candidate Status (Scheduled). Below this is a table for Interview Rounds with columns: Action, Interview Round, Interview Name, Interviewer, Interview Date, and Round Status. One row is selected, indicated by a blue border and a checked edit icon. The interview round is labeled '1' and the interviewer is 'John Michael'. At the bottom, there are buttons for 'Update' and 'Cancel'.

Figure 108

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

Please refer Figure 109

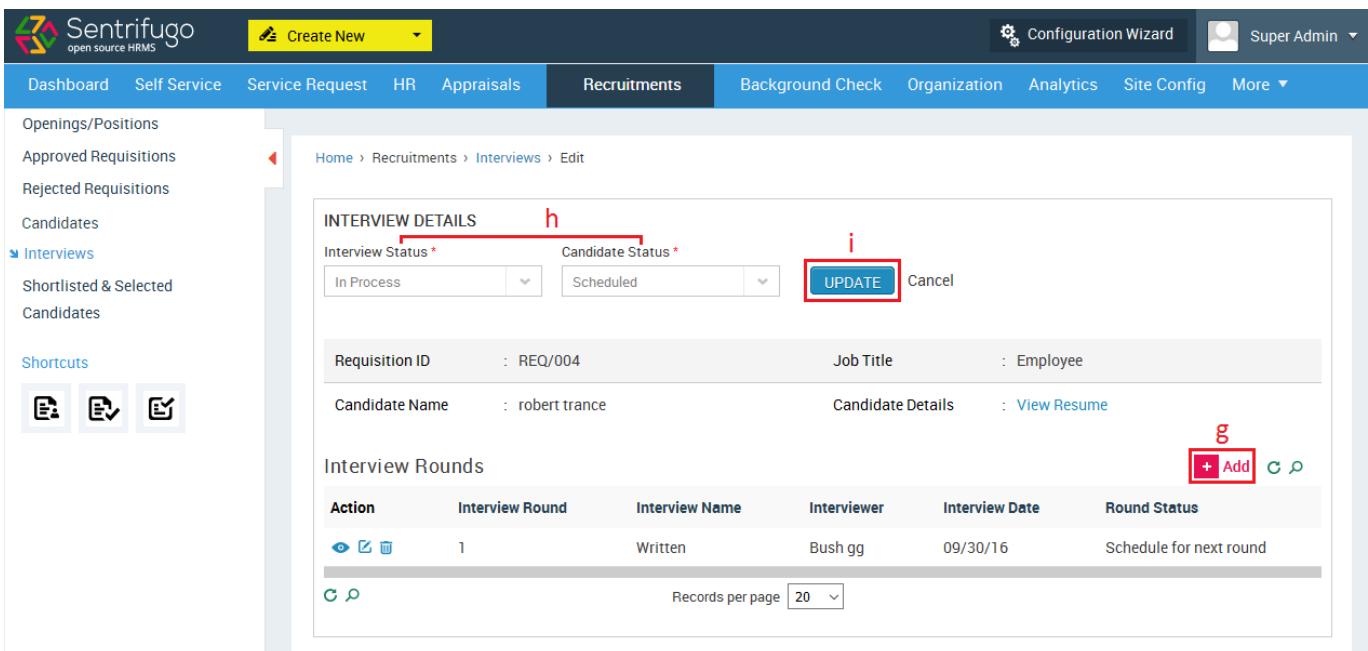
Interview Rounds

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; margin-bottom: 10px;" type="button" value="UPDATE"/> Cancel	

Figure 109

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

Please refer Figure 110



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

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

Requisition ID : REQ/004 Job Title : Employee
Candidate Name : robert trance Candidate Details : [View Resume](#)

Interview Rounds

Action	Interview Round	Interview Name	Interviewer	Interview Date	Round Status
	1	Written	Bush gg	09/30/16	Schedule for next round

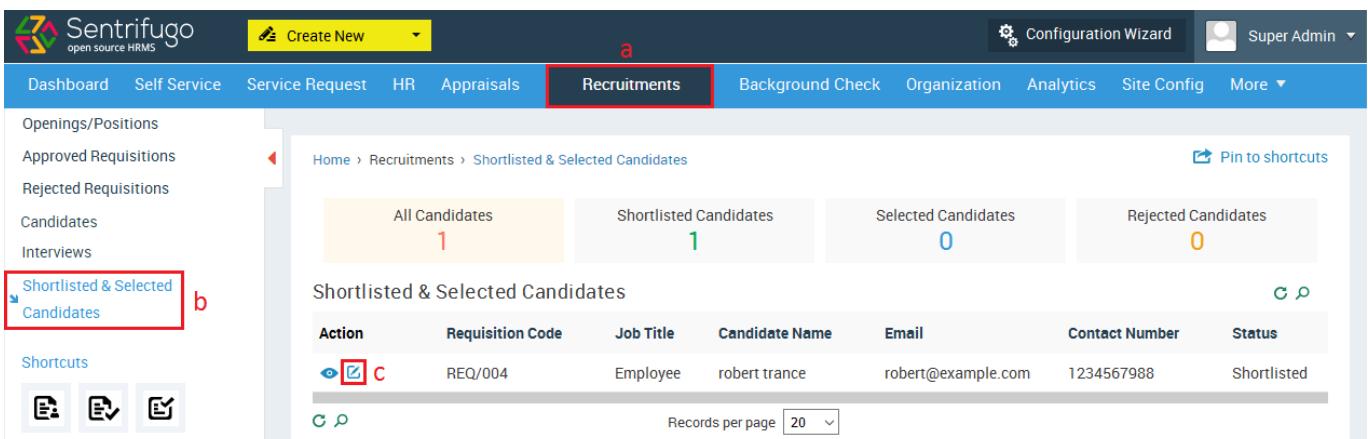
Records per page 20

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



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

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

All Candidates 1 Shortlisted Candidates 1 Selected Candidates 0 Rejected Candidates 0

Shortlisted & Selected Candidates

Action	Requisition Code	Job Title	Candidate Name	Email	Contact Number	Status
	REQ/004	Employee	robert trance	robert@example.com	1234567988	Shortlisted

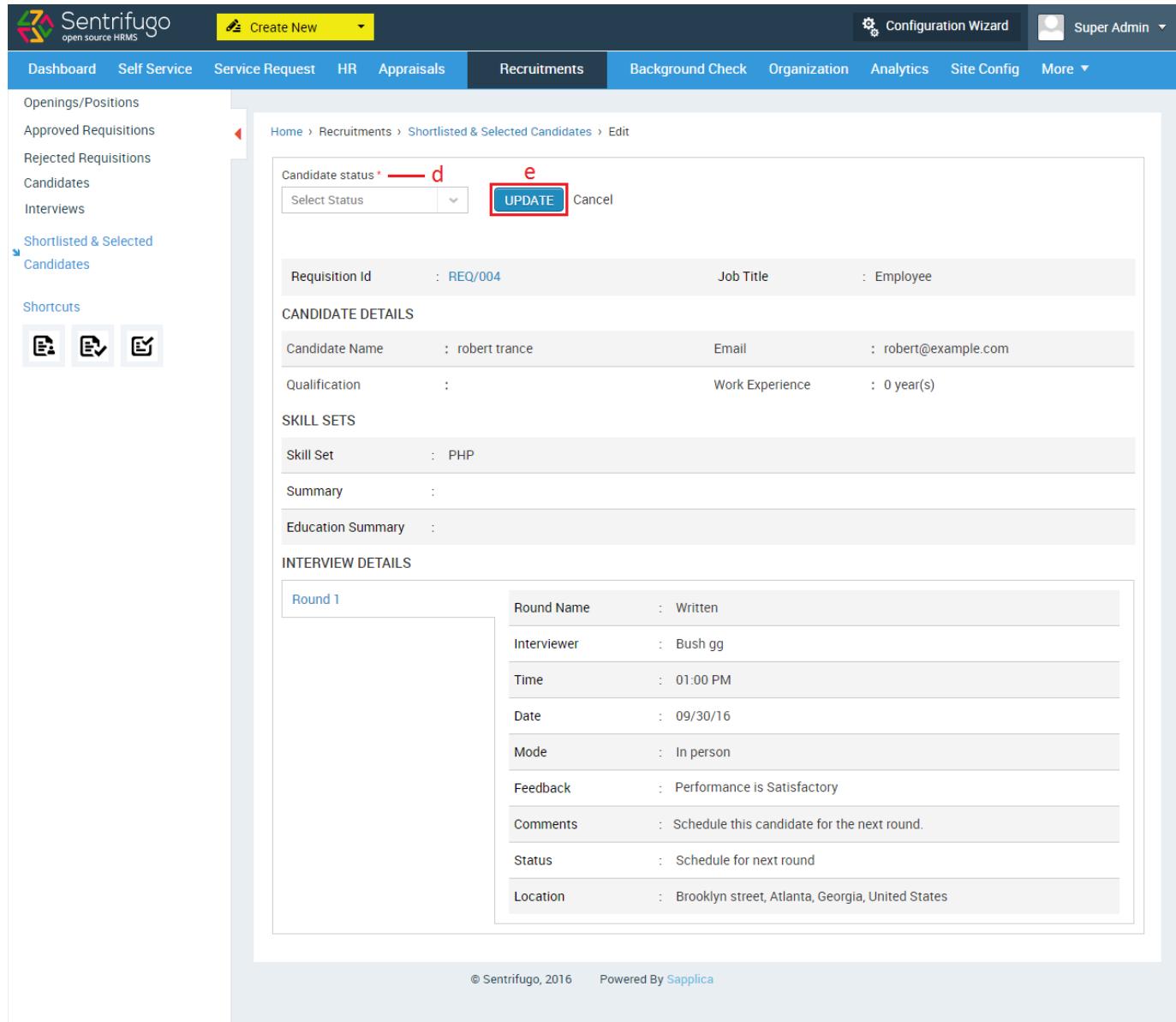
Records per page 20

Figure 111

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

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

Please refer Figure 112



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Create New, Configuration Wizard, and Super Admin. The main menu has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (selected), Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists Openings/Positions, Approved Requisitions, Rejected Requisitions, Candidates, Interviews, Shortlisted & Selected Candidates (selected), and Shortcuts. The main content area displays a form for editing a selected candidate. The form includes fields for Requisition Id (REQ/004), Job Title (Employee), Candidate Name (robert trance), Email (robert@example.com), Qualification, and Work Experience. Under Skill Sets, PHP is listed. The Interview Details section for Round 1 includes fields for 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), and Location (Brooklyn street, Atlanta, Georgia, United States). A red box highlights the 'Candidate status' dropdown and the 'UPDATE' button.

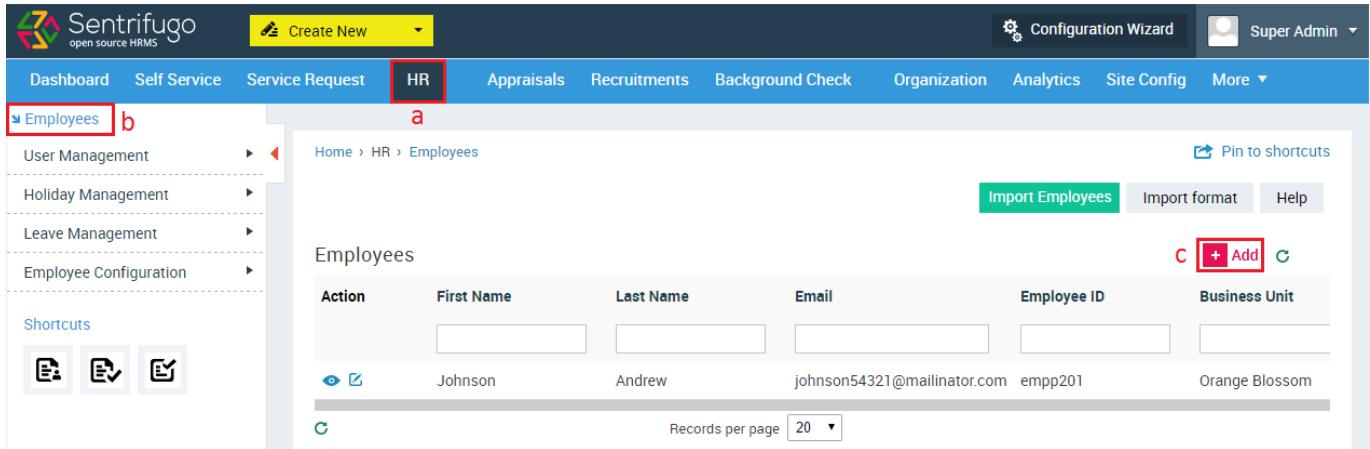
Figure 112

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

7.7 How do I add a Candidate as an Employee?

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

Please refer Figure 113

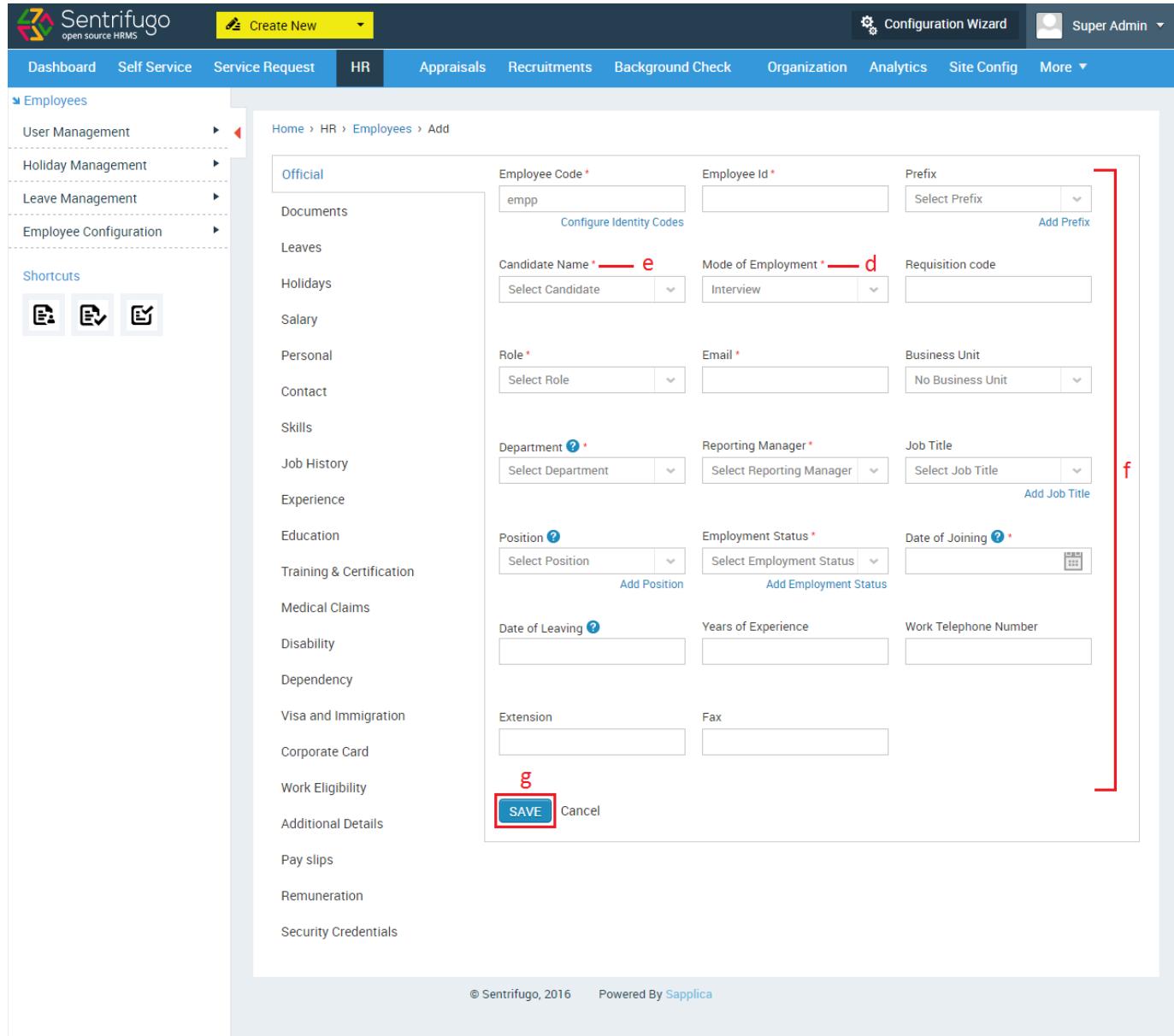


The screenshot shows the Sentrifugo open source HRMS interface. The top navigation bar includes a logo, a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. The main menu has tabs for Dashboard, Self Service, Service Request, HR (which is highlighted), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar has 'Employees' selected (marked 'b') and other options like User Management, Holiday Management, Leave Management, and Employee Configuration. Below the sidebar is a 'Shortcuts' section with three icons. The main content area is titled 'Employees' and shows a table with columns: Action, First Name, Last Name, Email, Employee ID, and Business Unit. One row is displayed: Johnson, Andrew, johnson54321@mailinator.com, empp201, Orange Blossom. There are buttons for 'Import Employees', 'Import format', and 'Help'. A red box labeled 'c' highlights the '+ Add' button.

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. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The HR menu is expanded, showing sub-options like User Management, Holiday Management, Leave Management, and Employee Configuration. The main content area is titled 'Employees' and shows a sub-menu for 'User Management'. The current page is 'Add' under 'Employees'. The form fields include:

- Official section: Employee Code * (empp), Employee Id *, Prefix (Select Prefix, Add Prefix)
- Candidate Name * (Select Candidate) and Mode of Employment * (Interview)
- Role * (Select Role), Email *, Business Unit (No Business Unit)
- Department * (Select Department), Reporting Manager * (Select Reporting Manager), Job Title (Select Job Title, Add Job Title)
- Position * (Select Position, Add Position), Employment Status * (Select Employment Status, Add Employment Status), Date of Joining * (Date input field)
- Date of Leaving (Date input field), Years of Experience, Work Telephone Number
- Extension, Fax
- Buttons: SAVE (highlighted with a red box), Cancel

At the bottom of the form, there are links for © Sentrifugo, 2016 and Powered By Sapplica.

Figure 114

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

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

Create New ▾

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

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

Shortcuts

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

Home > Recruitments > Approved Requisitions > View

Edit

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

REQUISITION DETAILS

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

JOB DETAILS

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

Candidate details

Candidate Name	Candidate Status
No data found	

REQUISITION HISTORY

Requisition status has been changed as Approved by Anderson Neo
2016-12-19 11:23 PM

Requisition status has been Approved by Andrew Joel
2016-12-14 02:17 AM

Requisition has been Created by Anderson Neo
2016-12-14 02:11 AM

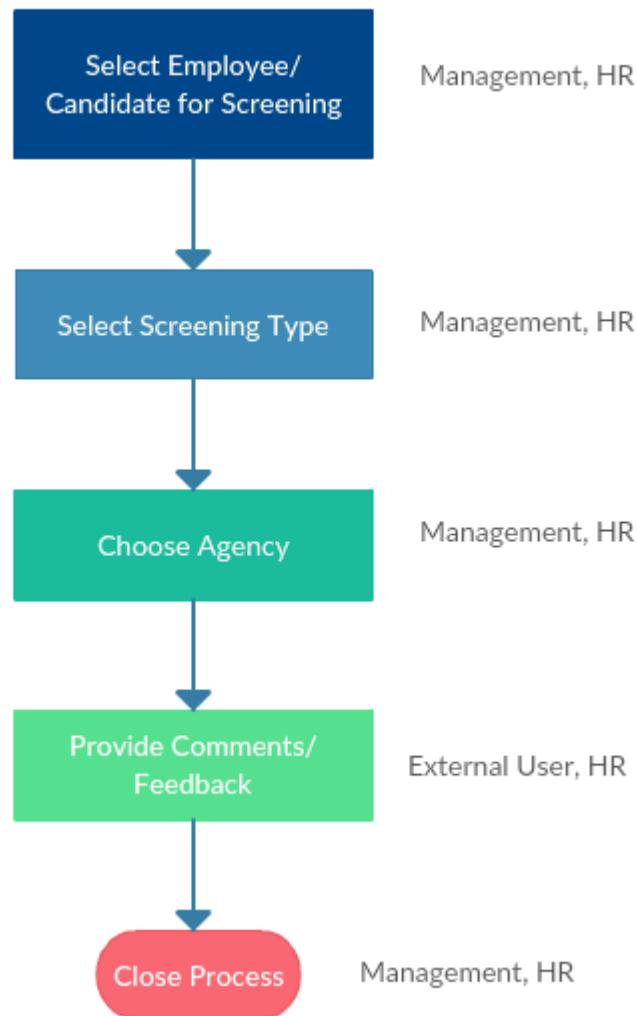
© Sentrifugo, 2016 Powered By [Sapplica](#)

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8. Background Check

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



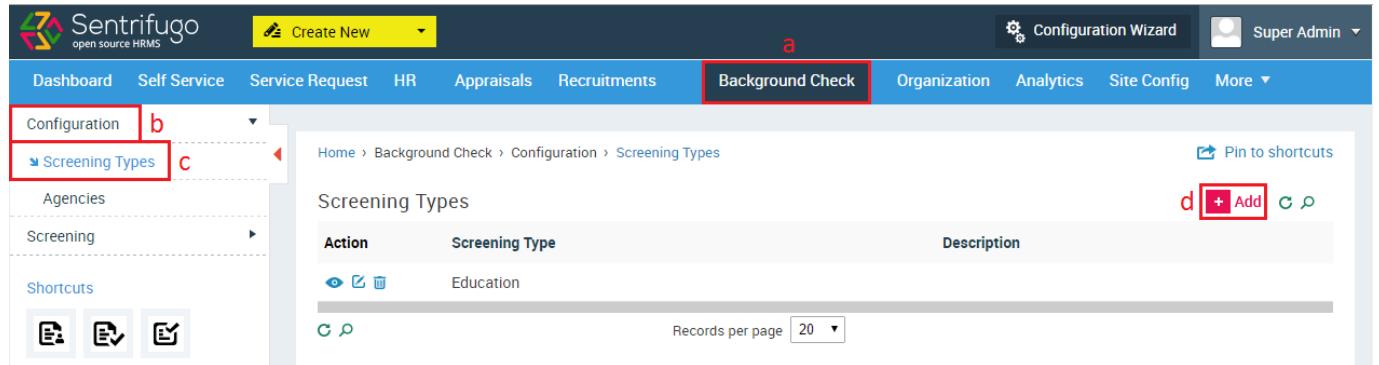
Description:

- A User (Management, HR) selects an employee or candidate to have a background check performed on him/her
- The User selects the screening type and an agency for that screening type

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

8.1 How do I add a Screening Type?

Please refer Figure 115

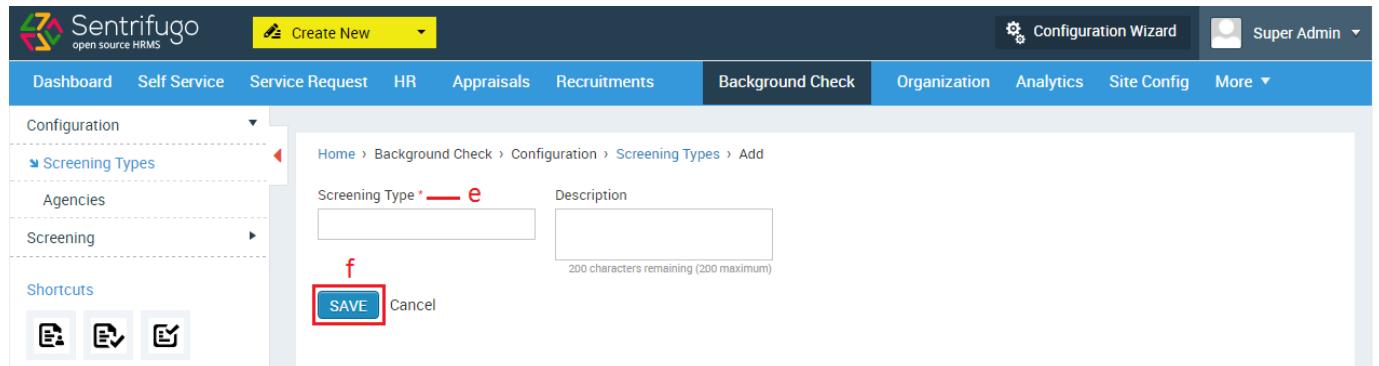


The screenshot shows the Sentrifugo application interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (which is highlighted in red), Organization, Analytics, Site Config, and More. On the far right, there is a Configuration Wizard icon, a Super Admin dropdown, and a user profile icon. The left sidebar has a 'Configuration' section with 'Screening Types' selected (highlighted in red). Below it are 'Agencies' and 'Screening' sections, and a 'Shortcuts' area with three icons. The main content area shows a breadcrumb path: Home > Background Check > Configuration > Screening Types. It displays a table titled 'Screening Types' with columns for Action, Screening Type, and Description. One row is visible: 'Education'. At the bottom right of the table are 'Records per page' and a dropdown set to 20. To the right of the table is a 'Pin to shortcuts' link and a red-bordered 'Add' button. The entire interface is styled with a light blue header and a white body.

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



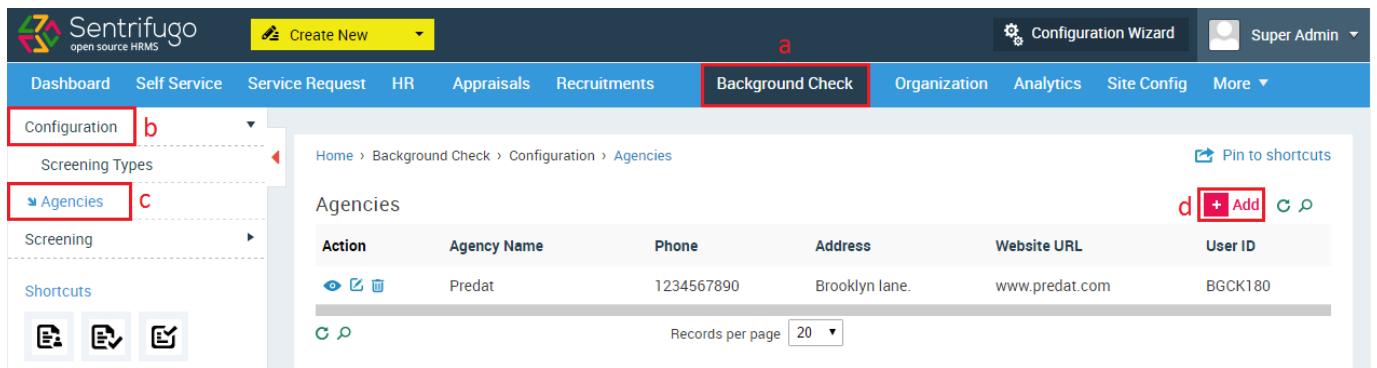
The screenshot shows the 'Add Screening Type' form. The top navigation bar and sidebar are identical to Figure 115. The main content area shows a breadcrumb path: Home > Background Check > Configuration > Screening Types > Add. The form has fields for 'Screening Type' (with a red border around it) and 'Description' (with a note '200 characters remaining (200 maximum)'). At the bottom are 'SAVE' and 'Cancel' buttons, with the 'SAVE' button highlighted in red. The interface is consistent with Figure 115, featuring a light blue header and a white body.

Figure 116

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

8.2 How do I add an Agency?

Please refer Figure 117



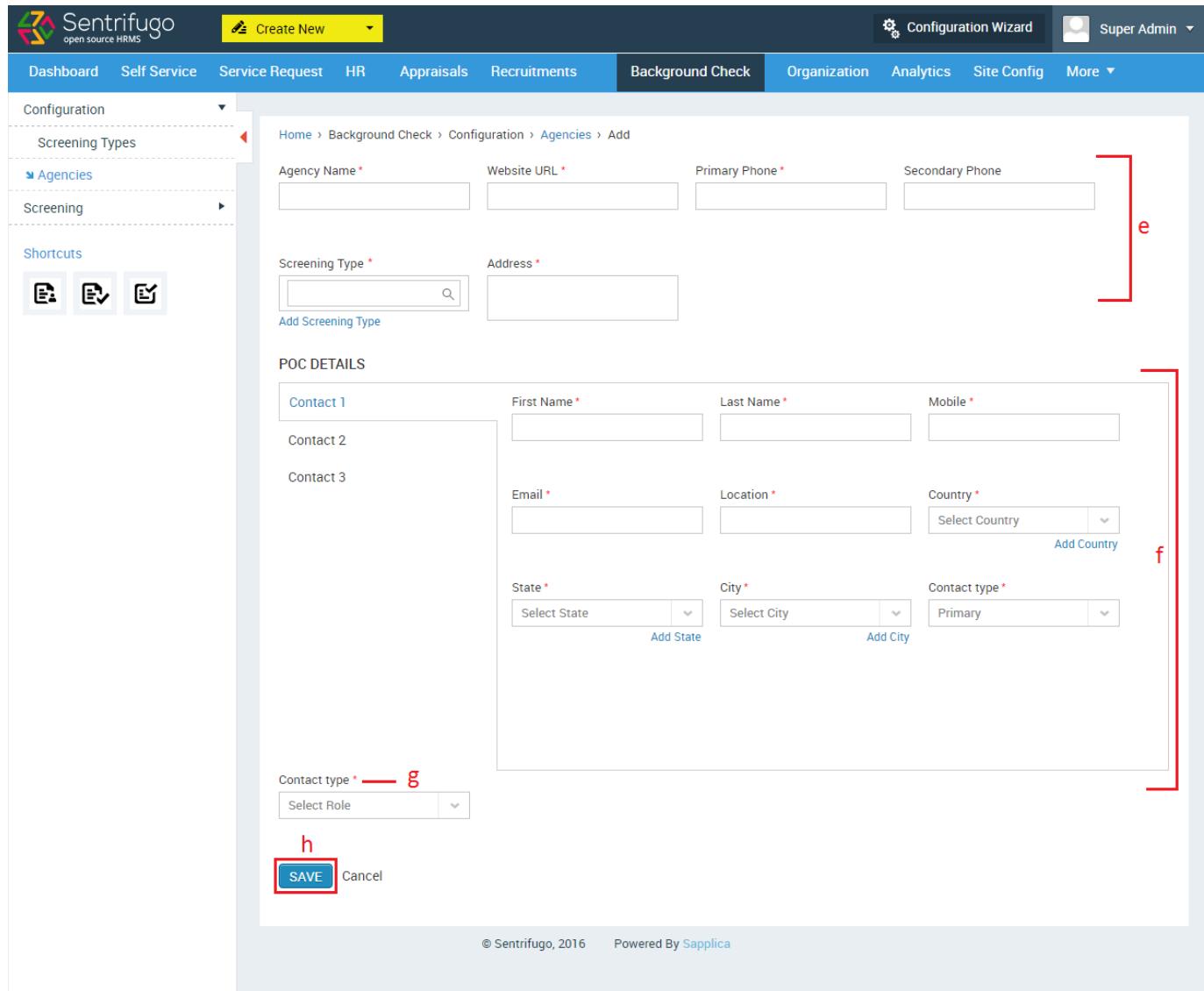
The screenshot shows the Sentrifugo web application interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (which is highlighted with a red box), Organization, Analytics, Site Config, and More. Below the navigation bar is a left sidebar with a 'Configuration' section expanded, showing 'Screening Types' and 'Agencies' (which is also highlighted with a red box). Under 'Agencies', there is a 'Shortcuts' section with three icons. The main content area shows a breadcrumb path: Home > Background Check > Configuration > Agencies. Below the breadcrumb is a table titled 'Agencies' with one row. The table columns are Action, Agency Name, Phone, Address, Website URL, and User ID. The single row contains the value 'Predat' for Agency Name, '1234567890' for Phone, 'Brooklyn lane.' for Address, 'www.predat.com' for Website URL, and 'BGCK180' for User ID. There are edit and delete icons next to the 'Predat' entry. At the bottom of the table area, there is a 'Records per page' dropdown set to 20. On the right side of the table, there is a 'Pin to shortcuts' link and a red box highlighting the '+Add' button.

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

Figure 117

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

Please refer Figure 118



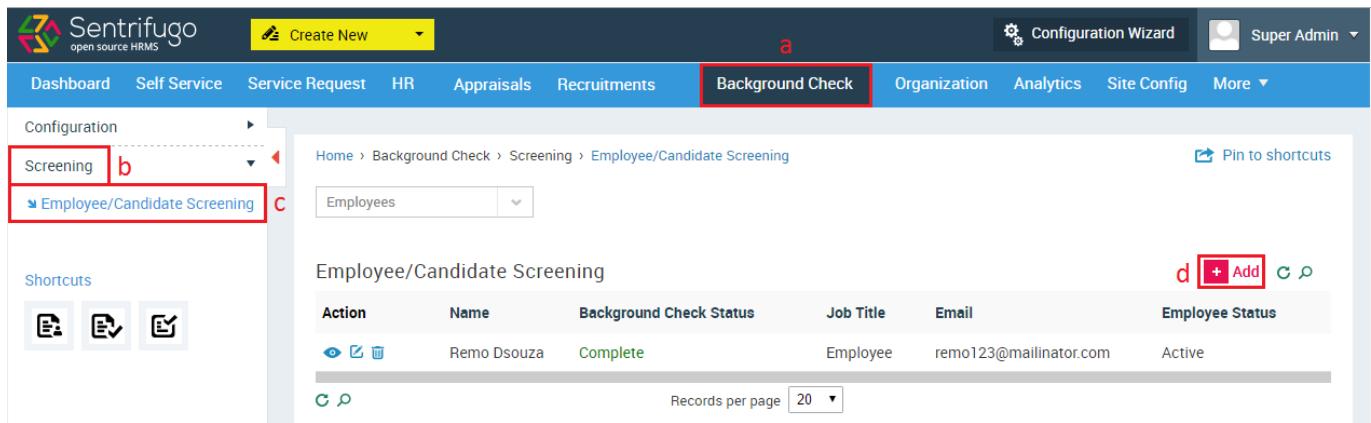
The screenshot shows the Sentrifugo web interface for managing background checks. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (which is active), Organization, Analytics, Site Config, and More. The left sidebar has sections for Configuration (Screening Types, Agencies, Screening, Shortcuts) and a search bar. The main content area shows a form for adding an agency, with fields for Agency Name, Website URL, Primary Phone, Secondary Phone, Screening Type, and Address. Below this is a section for POC DETAILS, which includes fields for Contact 1 (First Name, Last Name, Mobile), Contact 2, Contact 3 (Email, Location, Country), and Contact type (State, City). At the bottom, there is a Contact type dropdown and a SAVE button. Red annotations are present: 'e' points to the screening type and address fields; 'f' points to the POC details section; 'g' points to the Contact type dropdown; and 'h' points to the SAVE button.

Figure 118

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

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

Please refer Figure 119

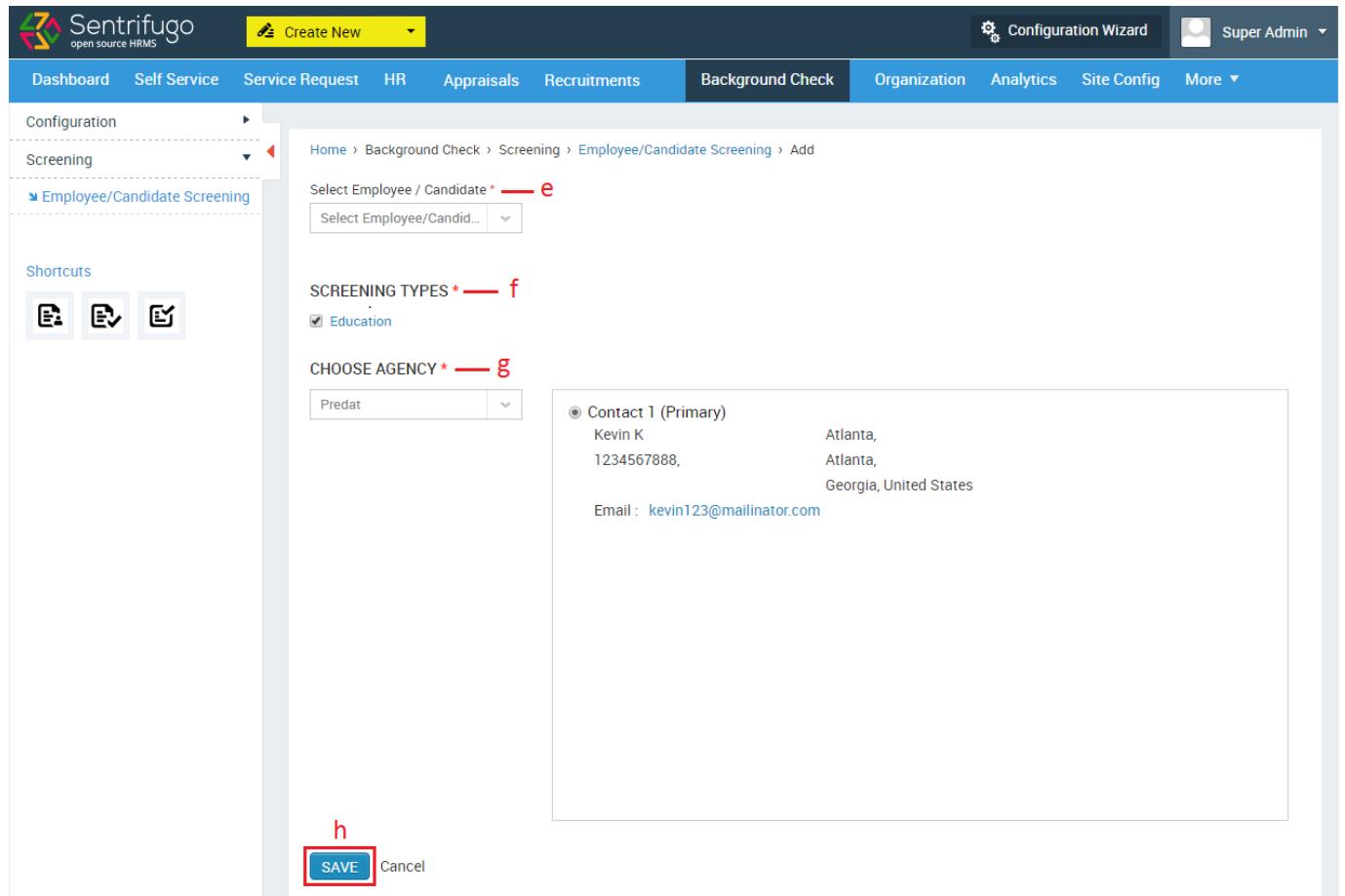


The screenshot shows the Sentrifugo HRMS application interface. The top navigation bar includes a 'Create New' button, a 'Configuration Wizard' button, and a 'Super Admin' dropdown. The main menu has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (highlighted with a red box), Organization, Analytics, Site Config, and More. On the left, a 'Configuration' sidebar shows 'Screening' expanded, with 'Employee/Candidate Screening' selected and highlighted with a red box. The main content area displays a list titled 'Employee/Candidate Screening' with one record: Remo Dsouza, Status: Complete, Job Title: Employee, Email: remo123@mailinator.com, Employee Status: Active. There are buttons for '+Add' and 'Print'. A 'Pin to shortcuts' link is also present.

Figure 119

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

Please refer Figure 120



Configuration

Screening

Employee/Candidate Screening

Shortcuts

CREATE EDIT

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

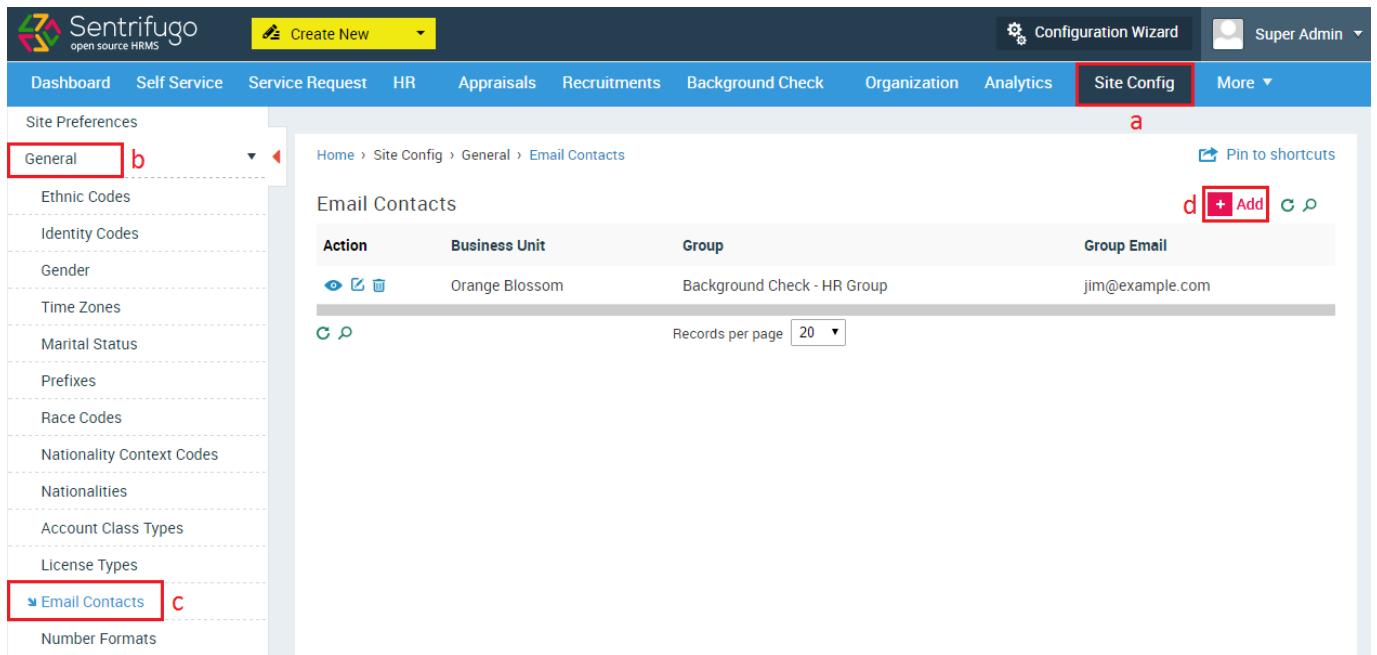
SAVE Cancel

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

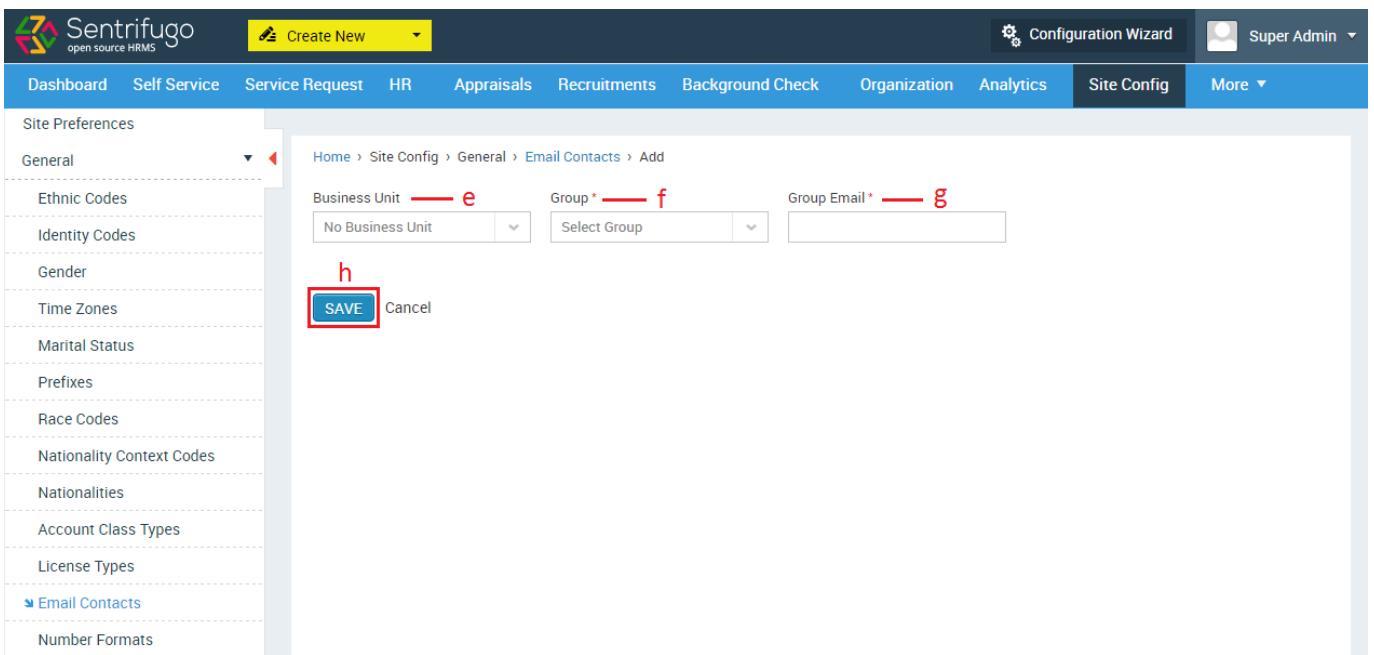


The screenshot shows the Sentrifugo open source HRMS application. The top navigation bar includes links for Create New, Configuration Wizard, Super Admin, Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (which is highlighted with a red box 'a'), and More. On the left, a sidebar under Site Preferences lists various code categories: Ethnic Codes, Identity Codes, Gender, Time Zones, Marital Status, Prefixes, Race Codes, Nationality Context Codes, Nationalities, Account Class Types, License Types, Email Contacts (which is highlighted with a red box 'b'), and Number Formats. The main content area displays the 'Email Contacts' section with a table. The table has columns for Action, Business Unit, Group, and Group Email. One row is shown: Action (with icons for eye, edit, delete), Business Unit (Orange Blossom), Group (Background Check - HR Group), and Group Email (Jim@example.com). Below the table are buttons for Pin to shortcuts, Add (highlighted with a red box 'd'), and search. At the bottom, there are links for Home, Site Config, General, and Email Contacts, along with a Records per page dropdown set to 20.

Figure 121

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

Please refer Figure 122



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

Figure 122

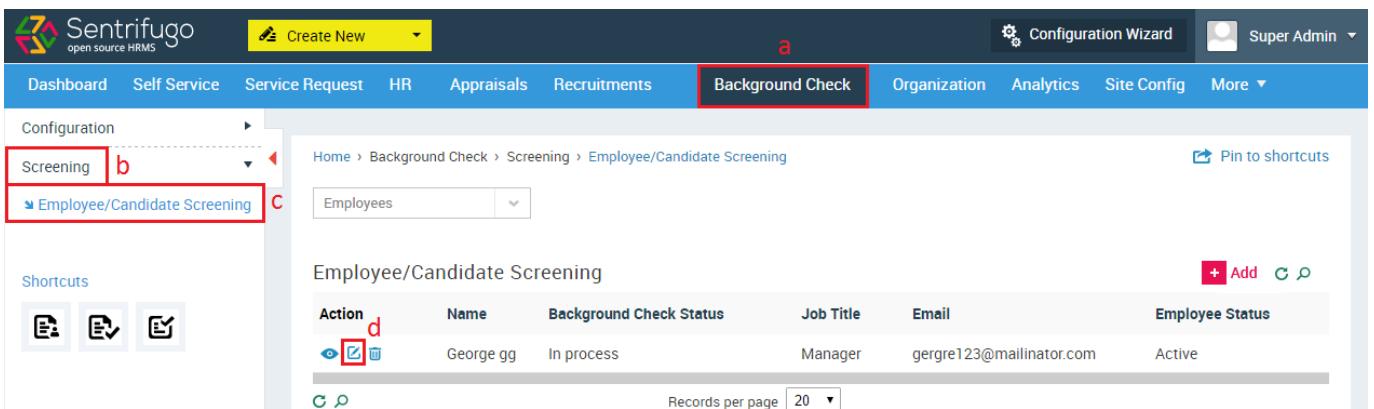
- e. Select the business unit the HR group
- f. Select 'Background Check – HR Group' (HR)/ 'Background Check' Management Group (Management)
- g. Enter group email id
- h. Click **SAVE** button



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

8.5 How do I provide Feedback as an External User?

Please refer Figure 123

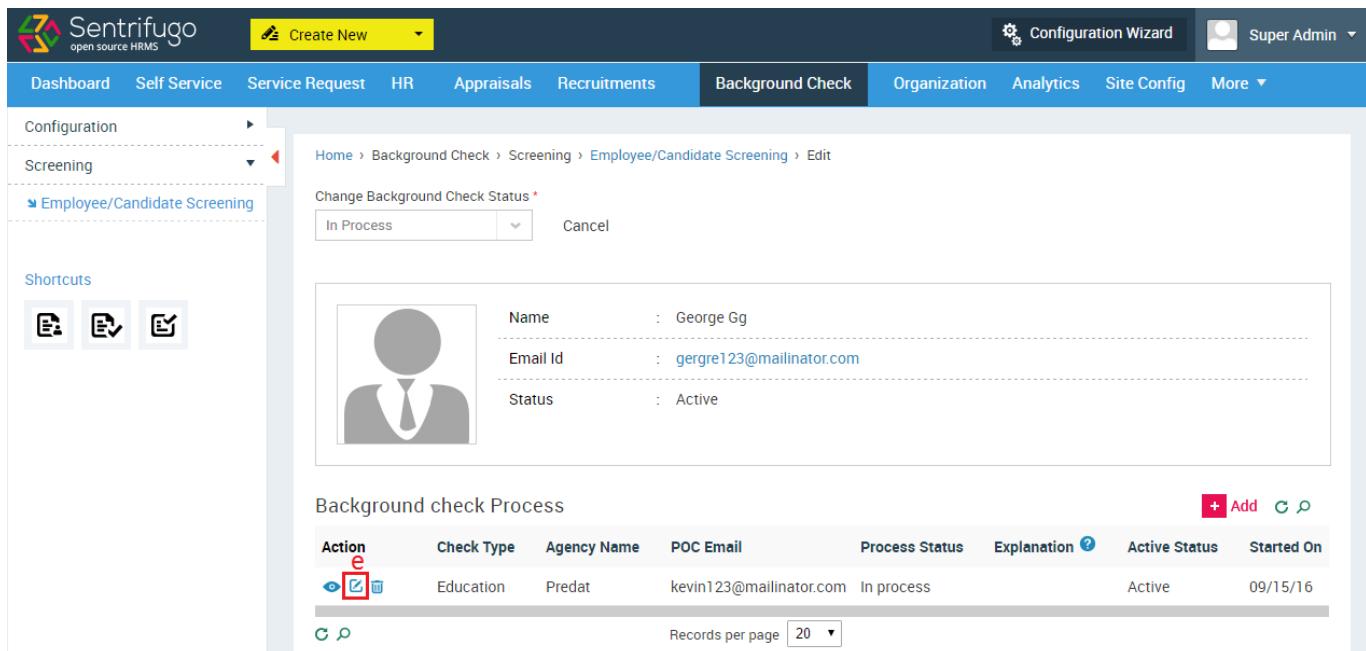


The screenshot shows the Sentrifugo interface for managing employee/candidate screening. The top navigation bar has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, **Background Check** (highlighted with a red box 'a'), Organization, Analytics, Site Config, and More. The left sidebar has sections for Configuration (with 'Screening' highlighted with a red box 'b') and Shortcuts. The main panel shows a breadcrumb path: Home > Background Check > Screening > Employee/Candidate Screening. It has a search bar for 'Employees'. Below is a table titled 'Employee/Candidate Screening' with columns: Action (highlighted with a red box 'd'), Name, Background Check Status, Job Title, Email, and Employee Status. A single row is shown: George gg, In process, Manager, gergre123@mailinator.com, Active. At the bottom are 'Add' and 'Search' buttons.

Figure 123

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

Please refer Figure 124



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

Figure 124

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

Please refer Figure 125

Background check Process

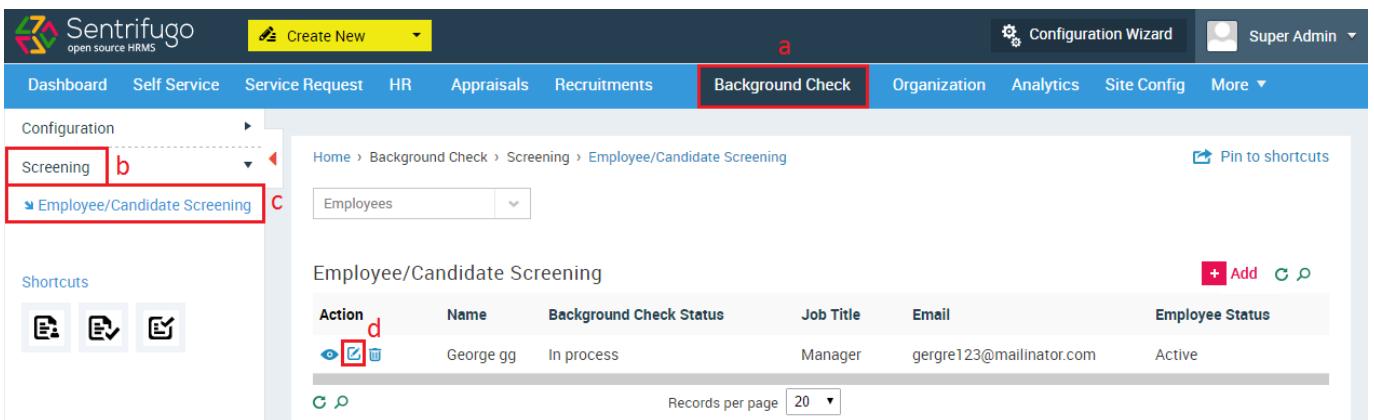
Change Background Check Status *	<input type="text" value="In Process"/>	UPLOAD FEEDBACK DOCUMENT ? — f
		<input type="button" value="Upload Feedback File"/>
		<input style="outline: 2px solid red;" type="button" value="SAVE"/> g
AGENCY & POC DETAILS		
Check Type	: Education	ENTER COMMENTS / FEEDBACK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

Figure 125

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

8.6 How do I close a Background Check Process?

Please refer Figure 126

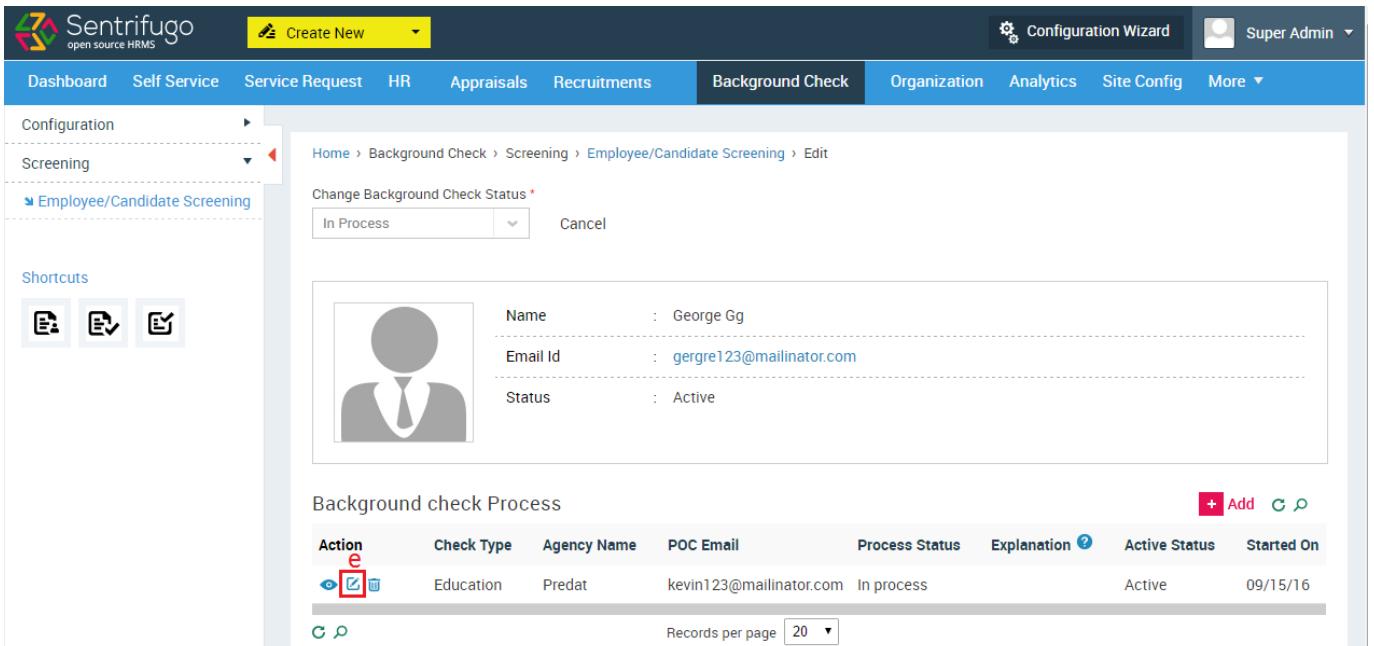


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has items like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (which is highlighted with a red box), Organization,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

Figure 126

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

Please refer Figure 127



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

Figure 127

To close a specific Background process:

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

Please refer Figure 128

Background check Process

Change Background Check Status * —— g

Complete

SAVE —— h

UPLOAD FEEDBACK DOCUMENT ? —— f

Upload Feedback File

SAVE

AGENCY & POC DETAILS

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

CLOSE

ENTER COMMENTS / FEEDBACK

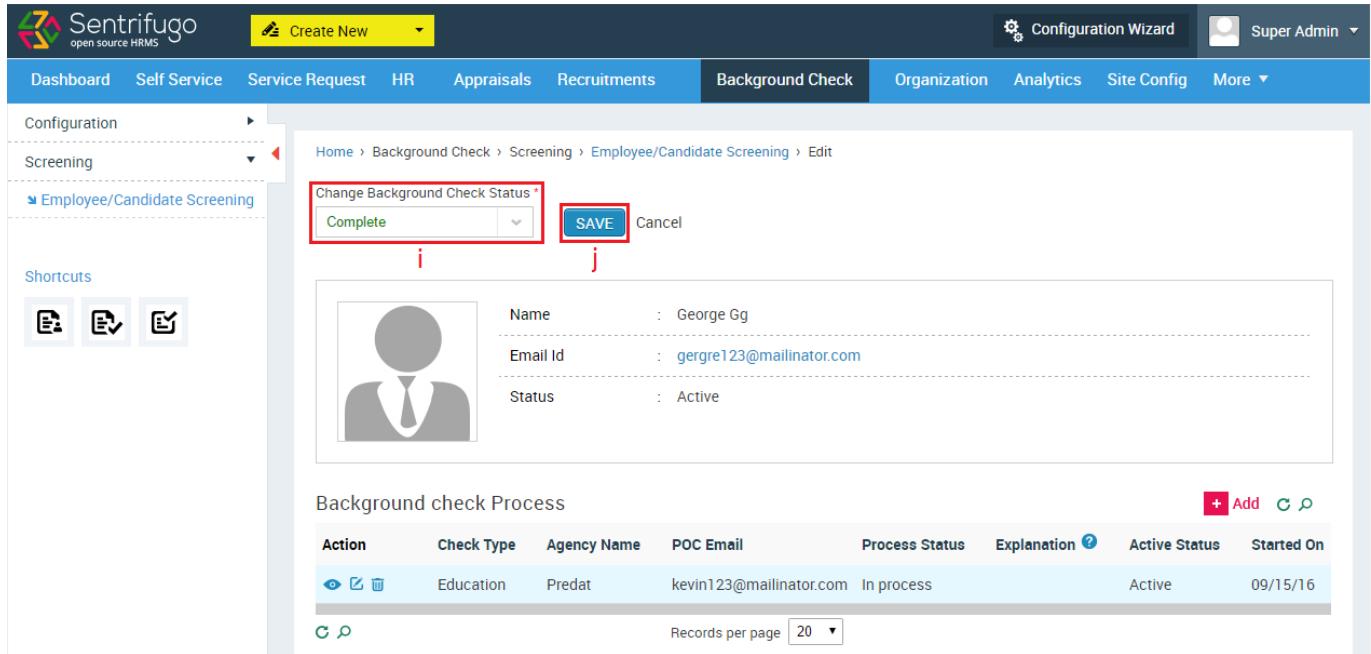
POST

No comments posted

Figure 128

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

Please refer Figure 129



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

The main content area shows a breadcrumb path: Home > Background Check > Screening > Employee/Candidate Screening > Edit. Below this, there is a form titled "Change Background Check Status". The status dropdown is set to "Complete" and the "SAVE" button is highlighted with a red box. A label "i" is placed next to the status dropdown, and a label "j" is placed next to the "SAVE" button.

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

On the left side of the main content area, there is a sidebar with sections for Configuration, Screening, Employee/Candidate Screening (which is selected and highlighted in blue), and Shortcuts. Under Shortcuts, there are three icons: a person icon, a mail icon, and a gear icon.

Figure 130

To close all Background processes for an employee:

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

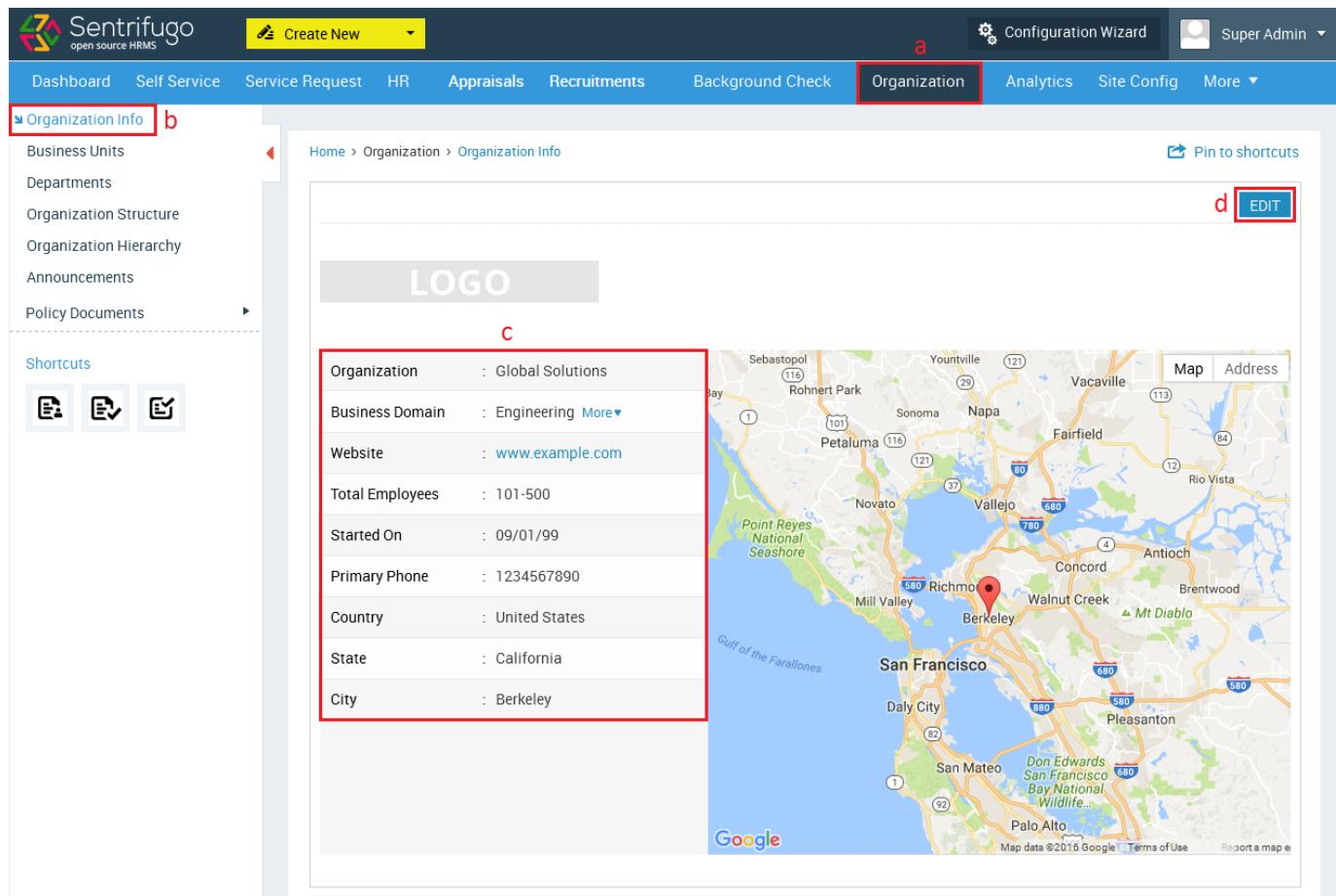
9. Organization

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

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

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

Please refer Figure 131



The screenshot shows the Sentrifugo web interface. At the top, there's a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, **Organization** (which is highlighted with a red box), Analytics, Site Config, and More. On the far right, there are icons for Configuration Wizard, Super Admin, and a user profile. Below the navigation bar is a left sidebar with a 'Organization Info' section (highlighted with a red box) containing links for Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, and Policy Documents. There are also three icons under 'Shortcuts'. The main content area shows a breadcrumb path: Home > Organization > Organization Info. It features a placeholder 'LOGO' at the top, followed by a table of organization details (highlighted with a red box):

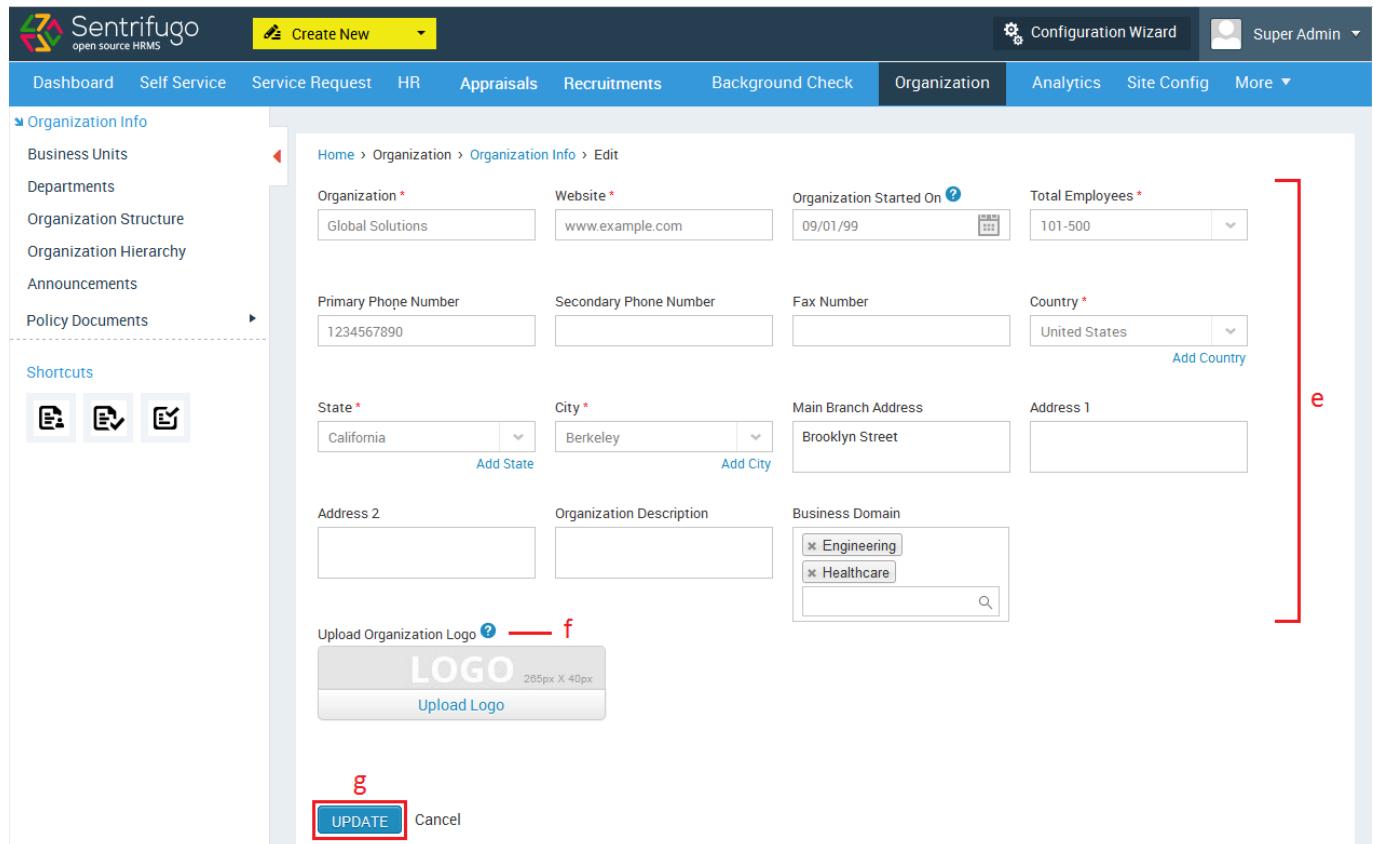
Organization	: Global Solutions
Business Domain	: Engineering More
Website	: www.example.com
Total Employees	: 101-500
Started On	: 09/01/99
Primary Phone	: 1234567890
Country	: United States
State	: California
City	: Berkeley

To the right of the table is a map of the San Francisco Bay Area with a red marker indicating the location. At the bottom right of the map is a 'Google' logo. Above the map, there are 'Map' and 'Address' buttons. In the top right corner of the main content area, there's a 'Pin to shortcuts' button and an 'EDIT' button (also highlighted with a red box). The bottom right of the map has small text: 'Map data ©2010 Google Terms of Use Report a map error'.

Figure 131

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

Please refer Figure 132



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization (selected), Analytics, Site Config, and More. On the left, a sidebar titled 'Organization Info' lists Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, and Policy Documents. Below this is a 'Shortcuts' section with three icons. The main content area displays organization details: Organization (Global Solutions), Website (www.example.com), Organization Started On (09/01/99), Total Employees (101-500), Primary Phone Number (1234567890), Secondary Phone Number, Fax Number, Country (United States), State (California), City (Berkeley), Main Branch Address (Brooklyn Street), Address 1, Address 2, Organization Description, Business Domain (Engineering, Healthcare), and an 'Upload Organization Logo' section with a placeholder 'LOGO' and a '285px X 40px' dimension note. At the bottom are 'UPDATE' and 'Cancel' buttons.

Figure 132

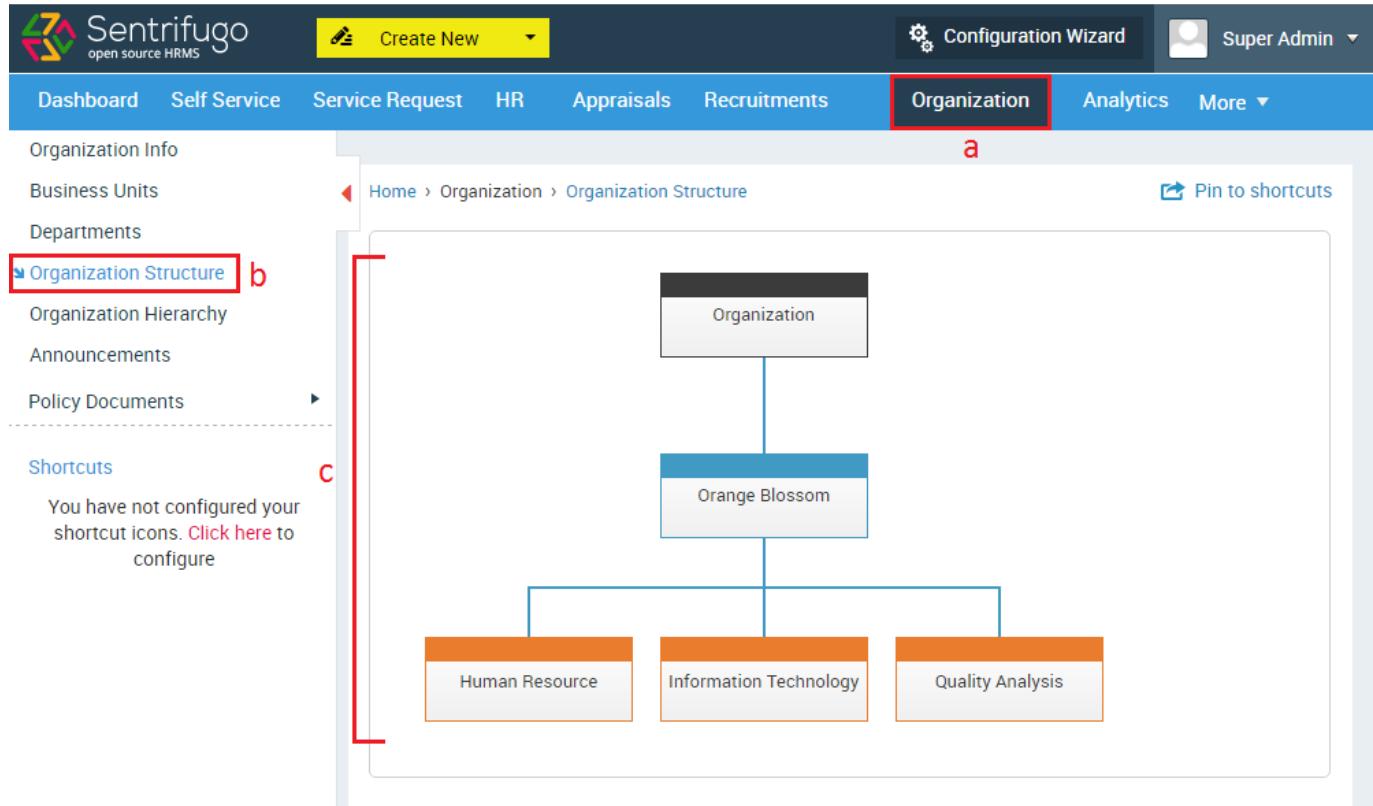
- e. Enter or modify details
- f. You can change your company logo
- g. Click **UPDATE** button

Business Units & Departments

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

9.2 How do I view my Organization Structure?

Please refer Figure 133



The screenshot shows the Sentrifugo application interface. At the top, there is a navigation bar with the Sentrifugo logo, a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. Below the navigation bar is a main menu with links: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, **Organization**, Analytics, and More. The 'Organization' link is highlighted with a red box. On the left side, there is a sidebar with sections for Organization Info, Business Units, Departments, and a expanded section for **Organization Structure** (also highlighted with a red box). This section contains links for Organization Hierarchy, Announcements, and Policy Documents. Below this is a 'Shortcuts' section with a message: 'You have not configured your shortcut icons. Click here to configure'. A red arrow labeled 'a' points to the 'Organization' link in the main menu. Another red arrow labeled 'b' points to the 'Organization Structure' link in the sidebar. A third red arrow labeled 'c' points to the 'Organization' node in the organization chart.

Organization Structure:

```

graph TD
    Organization[Organization] --- OrangeBlossom[Orange Blossom]
    OrangeBlossom --- HR[Human Resource]
    OrangeBlossom --- IT[Information Technology]
    OrangeBlossom --- QA[Quality Analysis]
  
```

Figure 133

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



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

9.3 How do I view my Organization Hierarchy?

Please refer Figure 134

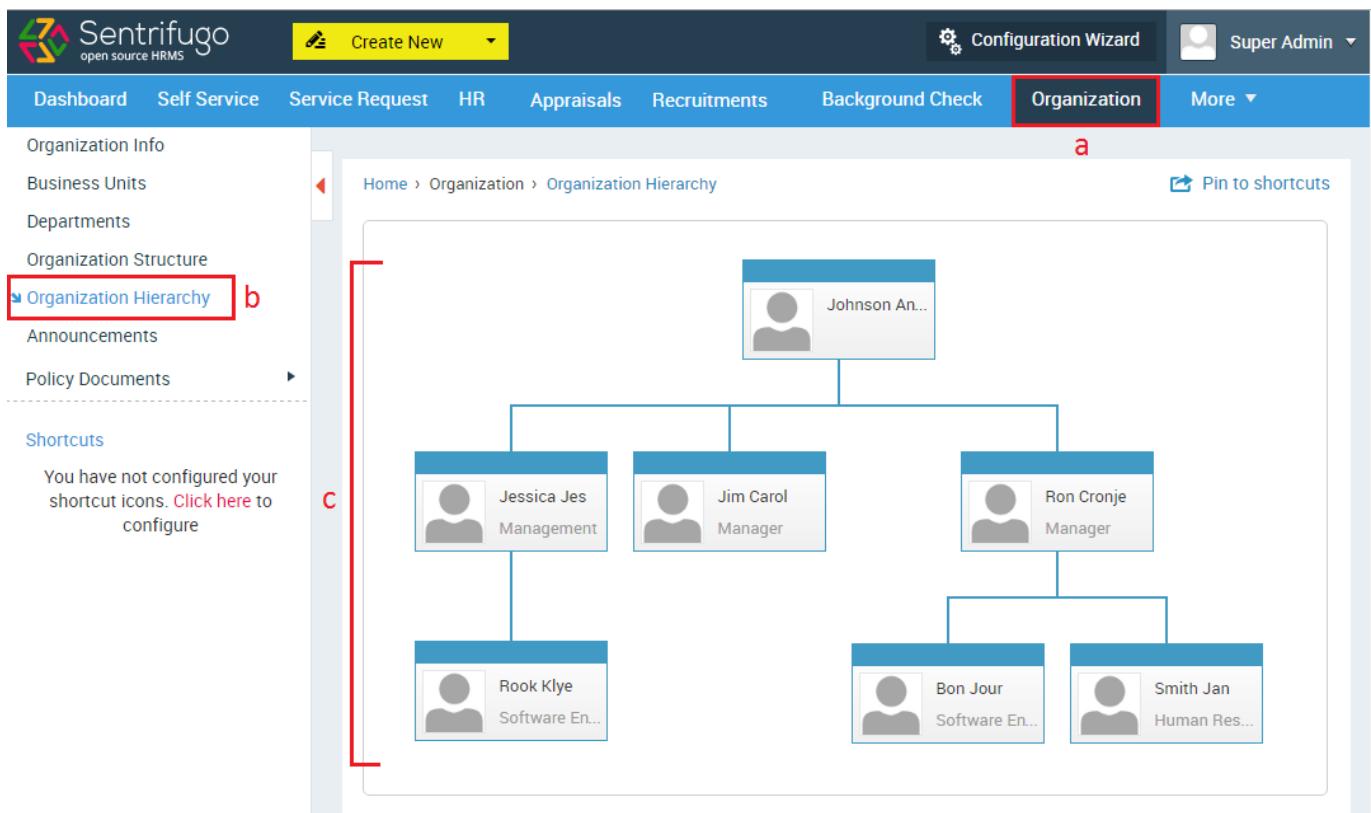


Figure 134

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



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

9.4 How do I add Announcements?

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

9.5 How do I add Policy Documents?

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

Please refer Figure 135

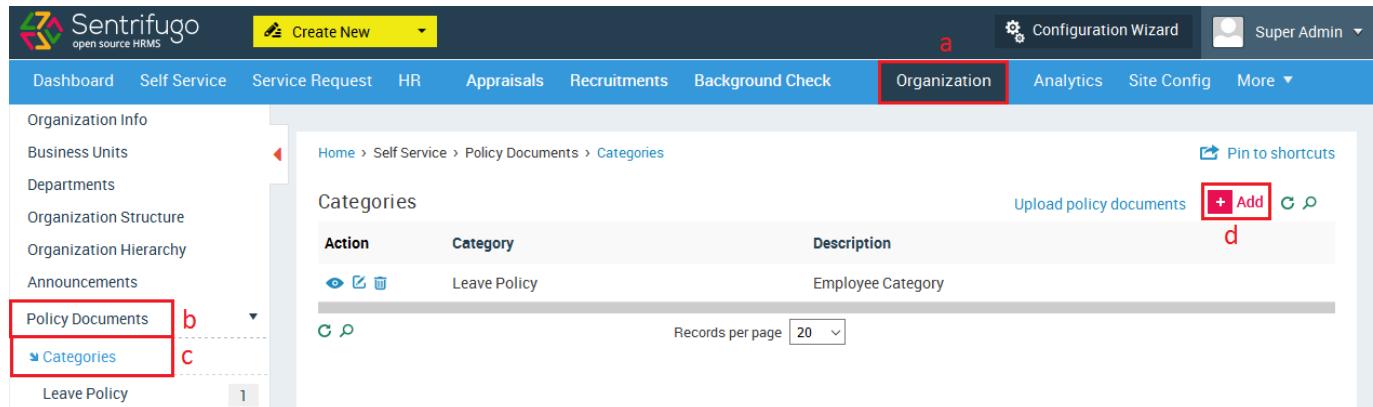


Figure 135

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

Please refer Figure 136

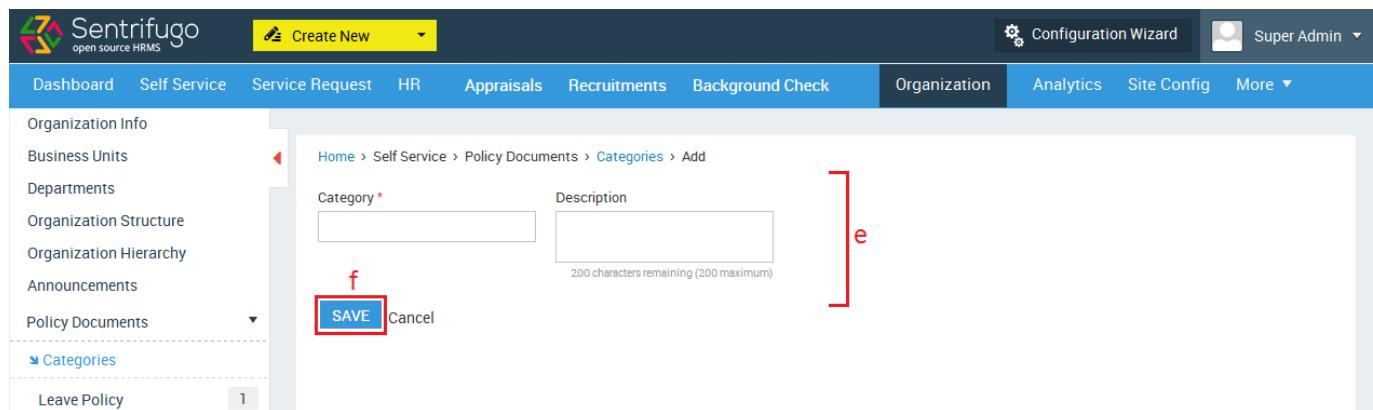
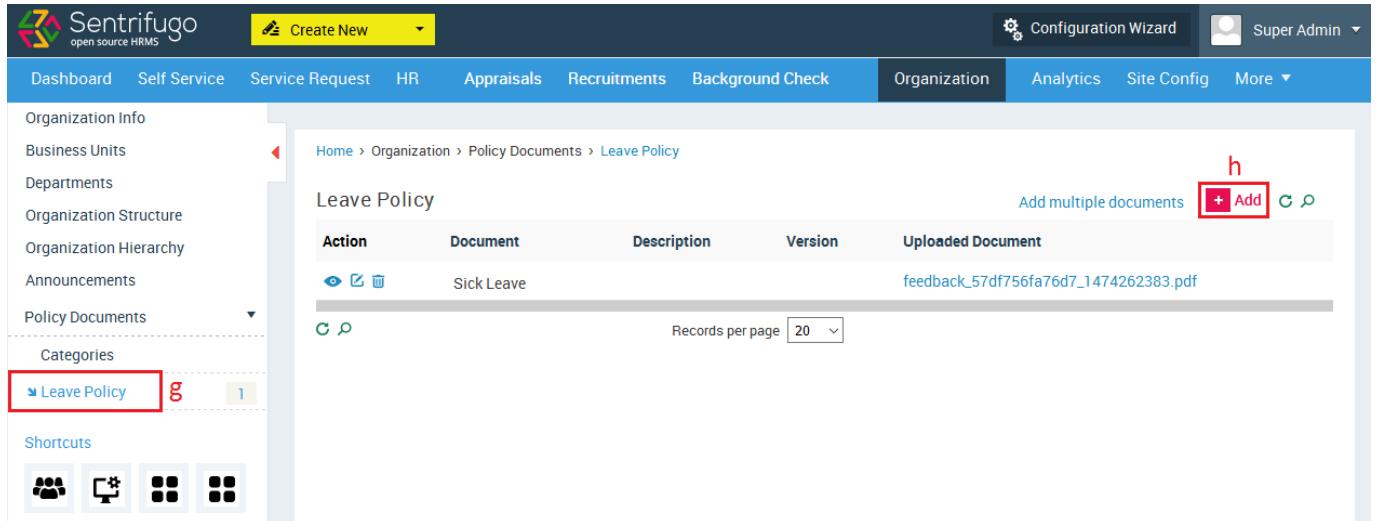


Figure 136

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

Please refer Figure 137

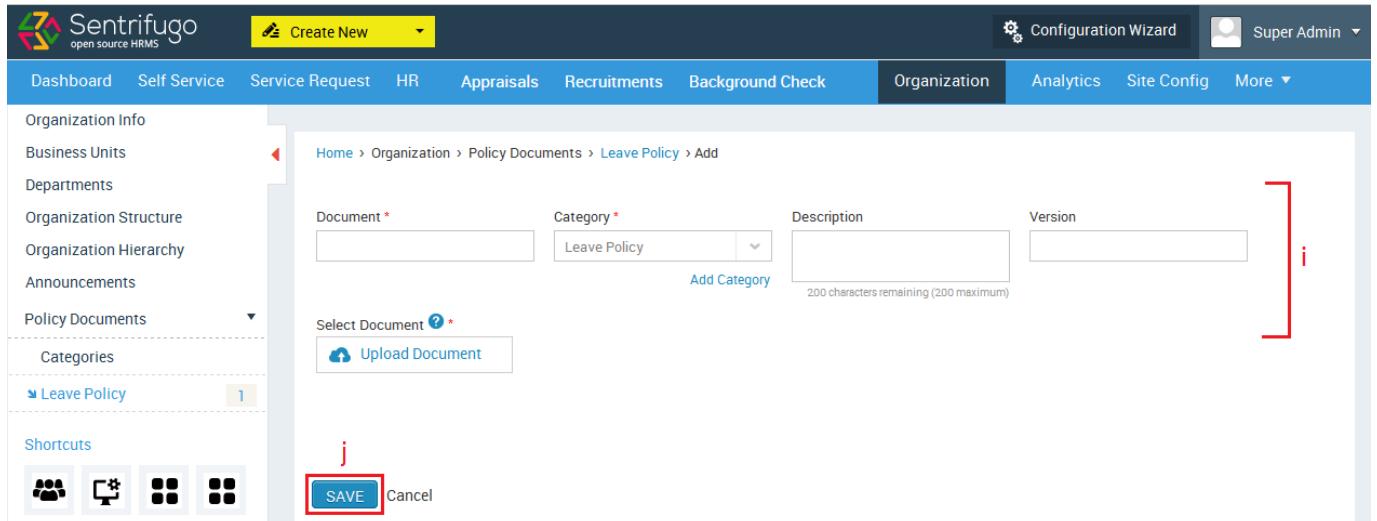


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The left sidebar has sections for Organization Info, Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, Policy Documents (with 'Leave Policy' selected), Categories, and Shortcuts. The main content area displays a list of 'Leave Policy' documents with columns for Action, Document, Description, Version, and Uploaded Document. A single entry for 'Sick Leave' is shown with the file name 'feedback_57df756fa76d7_1474262383.pdf'. There are buttons for Add multiple documents and +Add. A red box labeled 'g' highlights the 'Leave Policy' category in the sidebar. A red box labeled 'h' highlights the '+Add' button in the top right corner of the list table.

Figure 137

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

Please refer Figure 138



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The left sidebar has sections for Organization Info, Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, Policy Documents (with 'Leave Policy' selected), Categories, and Shortcuts. The main content area shows a form for adding a new 'Leave Policy' document. It includes fields for Document (with a placeholder), Category (set to 'Leave Policy'), Description (with a placeholder), Version, and a note about character limit (200 characters remaining). Below the form is a section for Select Document with an 'Upload Document' button. At the bottom left is a red box labeled 'j' highlighting the 'SAVE' button. A red bracket labeled 'i' points to the 'Category' dropdown.

Figure 138

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

9.6 How do I view Policy Documents?

Please refer Figure 139

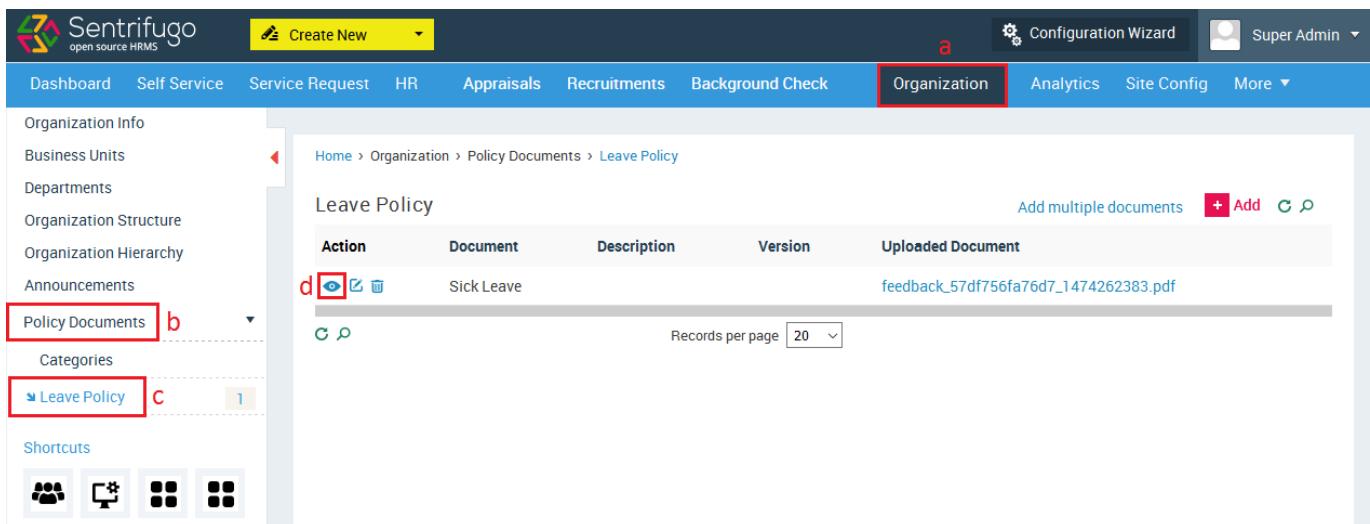


Figure 139

- 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.

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

10.1 How do I view/generate Reports?

Please refer Figure 140

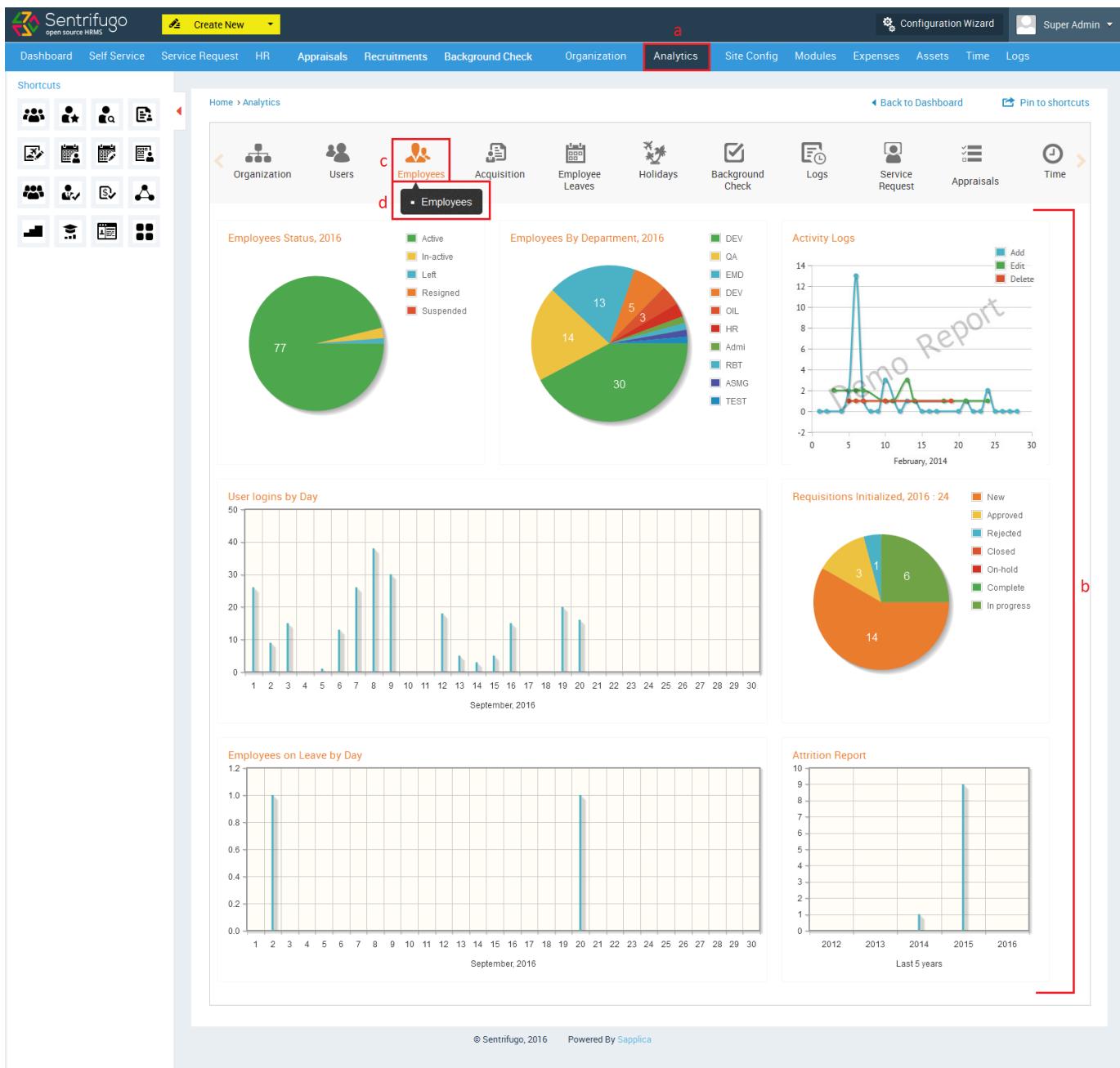
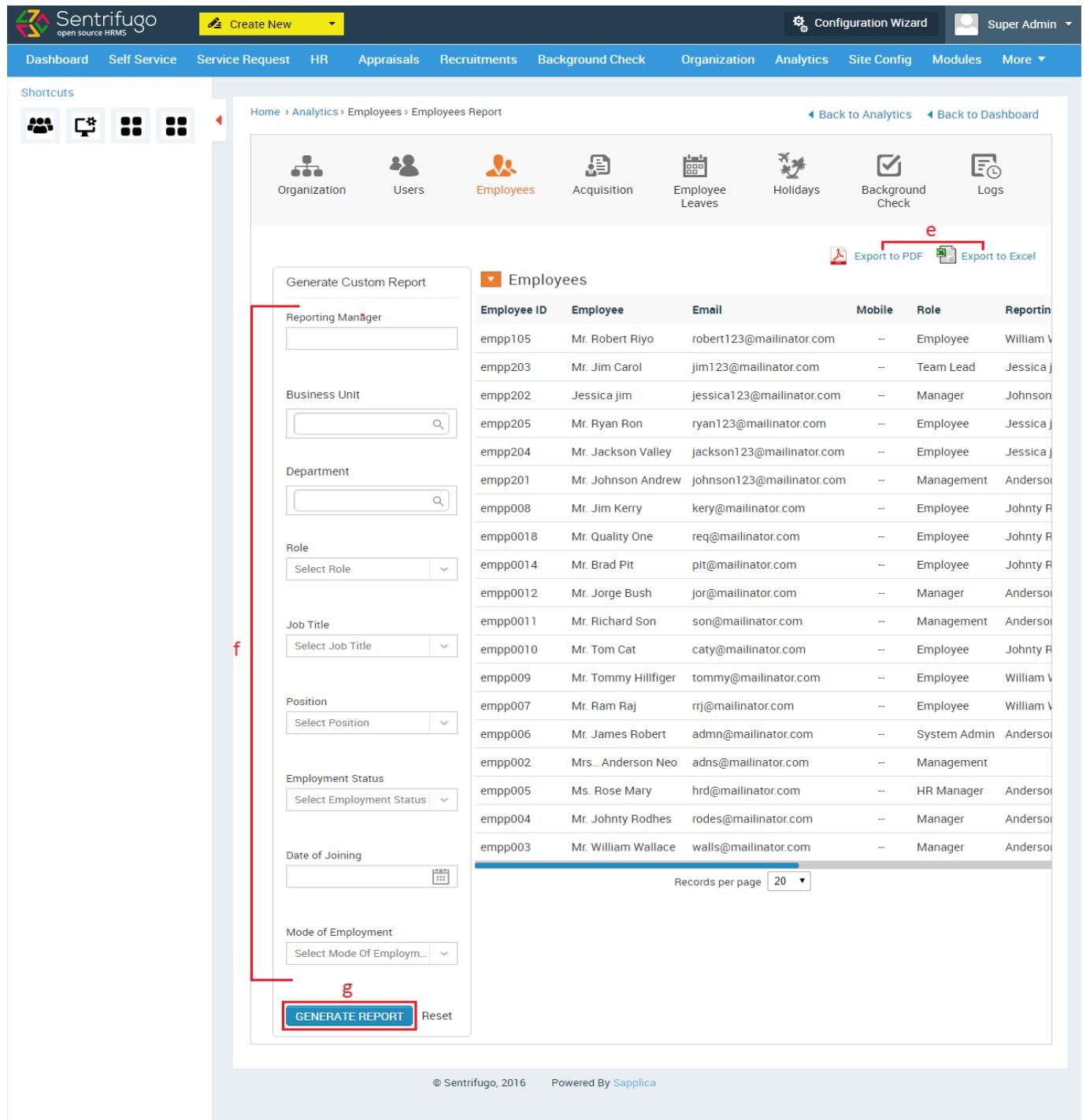


Figure 140

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

Please refer Figure 141



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

The main content area is titled 'Employees Report'. It features a table listing employees with columns for Employee ID, Employee, Email, Mobile, Role, and Reporting. Below the table are buttons for 'Export to PDF' and 'Export to Excel'. To the left of the table is a 'Generate Custom Report' sidebar with dropdowns for Reporting Manager, Business Unit, Department, Role, Job Title, Position, Employment Status, Date of Joining, and Mode of Employment. At the bottom of the sidebar is a large blue 'GENERATE REPORT' button.

Employee ID	Employee	Email	Mobile	Role	Reporting
empp105	Mr. Robert Riyo	robert123@mailinator.com	--	Employee	William V
empp203	Mr. Jim Carol	jim123@mailinator.com	--	Team Lead	Jessica j
empp202	Jessica jim	jessica123@mailinator.com	--	Manager	Johnson
empp205	Mr. Ryan Ron	ryan123@mailinator.com	--	Employee	Jessica j
empp204	Mr. Jackson Valley	jackson123@mailinator.com	--	Employee	Jessica j
empp201	Mr. Johnson Andrew	johnson123@mailinator.com	--	Management	Anderson
empp008	Mr. Jim Kerry	kery@mailinator.com	--	Employee	Johnty R
empp0018	Mr. Quality One	req@mailinator.com	--	Employee	Johnty R
empp0014	Mr. Brad Pit	pit@mailinator.com	--	Employee	Johnty R
empp0012	Mr. Jorge Bush	jor@mailinator.com	--	Manager	Anderson
empp0011	Mr. Richard Son	son@mailinator.com	--	Management	Anderson
empp0010	Mr. Tom Cat	caty@mailinator.com	--	Employee	Johnty R
empp009	Mr. Tommy Hillfiger	tommy@mailinator.com	--	Employee	William V
empp007	Mr. Ram Raj	rjj@mailinator.com	--	Employee	William V
empp006	Mr. James Robert	admn@mailinator.com	--	System Admin	Anderson
empp002	Mrs.. Anderson Neo	adns@mailinator.com	--	Management	
empp005	Ms. Rose Mary	hrd@mailinator.com	--	HR Manager	Anderson
empp004	Mr. Johny Rodhes	rodes@mailinator.com	--	Manager	Anderson
empp003	Mr. William Wallace	walls@mailinator.com	--	Manager	Anderson

Figure 141

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

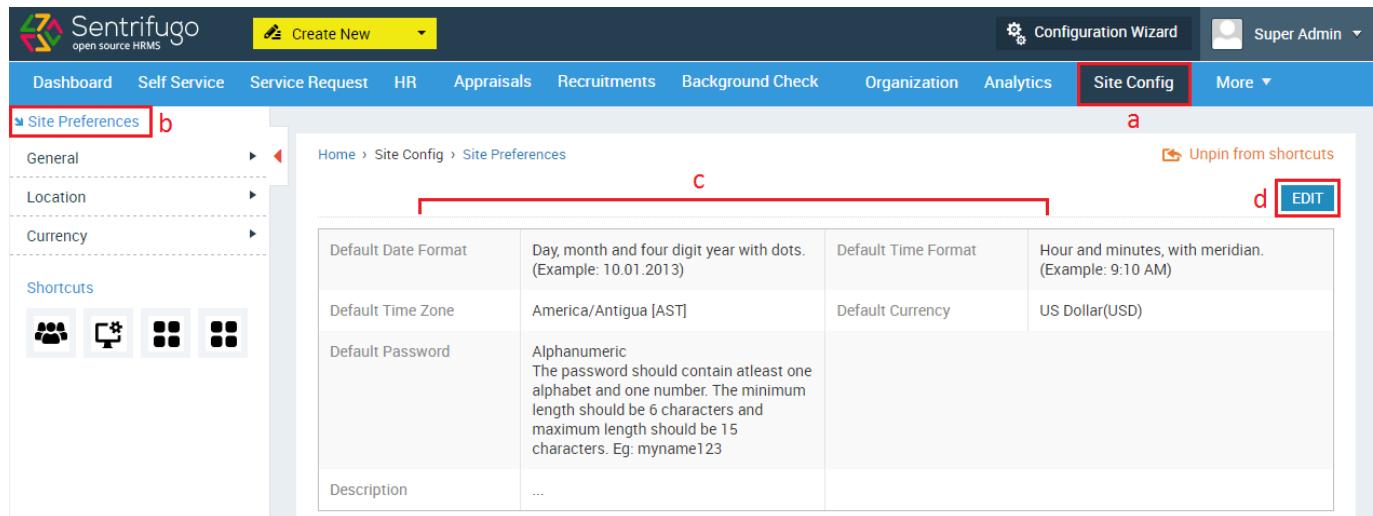
11. Site Config

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

11.1 How do I view/edit Site Preferences?

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

Please refer Figure 142

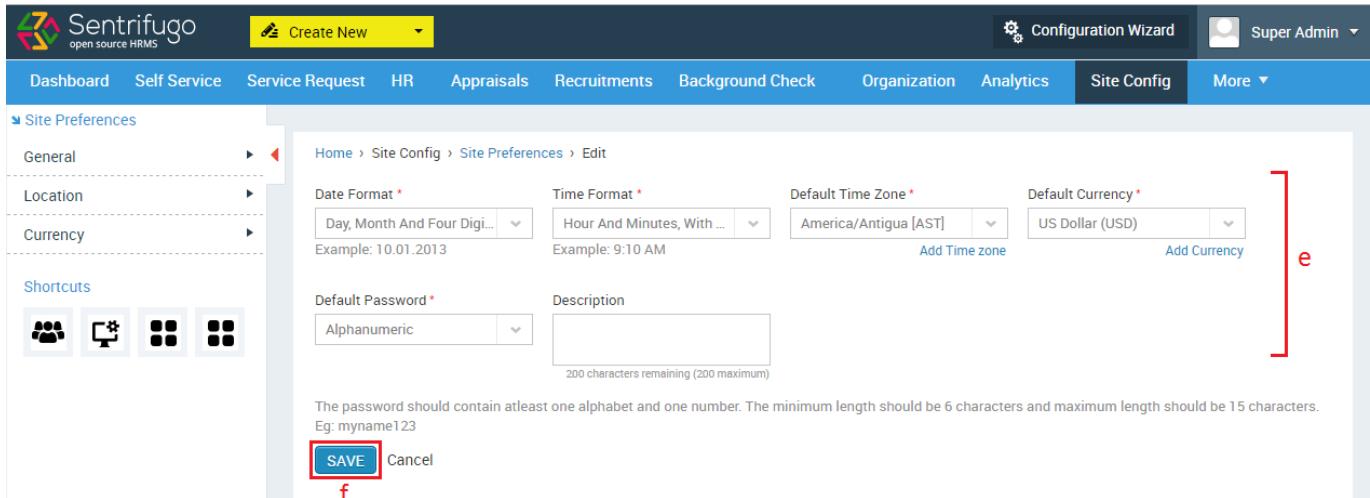


Default Date Format	Day, month and four digit year with dots. (Example: 10.01.2013)	Default Time Format	Hour and minutes, with meridian. (Example: 9:10 AM)
Default Time Zone	America/Antigua [AST]	Default Currency	US Dollar(USD)
Default Password	Alphanumeric The password should contain atleast one alphabet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

Figure 142

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

Please refer Figure 143



The screenshot shows the 'Site Preferences' section of the Sentrifugo application. On the left, there's a sidebar with 'General', 'Location', and 'Currency' sections. Below that is a 'Shortcuts' section with four icons. The main area displays four configuration fields: 'Date Format' (set to 'Day, Month And Four Digi...'), 'Time Format' (set to 'Hour And Minutes, With ...'), 'Default Time Zone' (set to 'America/Antigua [AST]'), and 'Default Currency' (set to 'US Dollar (USD)'). Each field has an 'Add' link ('Add Time zone' and 'Add Currency'). Below these fields are 'Default Password' (set to 'Alphanumeric') and 'Description' (a text input field). A note below the password field specifies requirements: 'The password should contain atleast one alphabet and one number. The minimum length should be 6 characters and maximum length should be 15 characters. Eg: myname123'. At the bottom are 'SAVE' and 'Cancel' buttons.

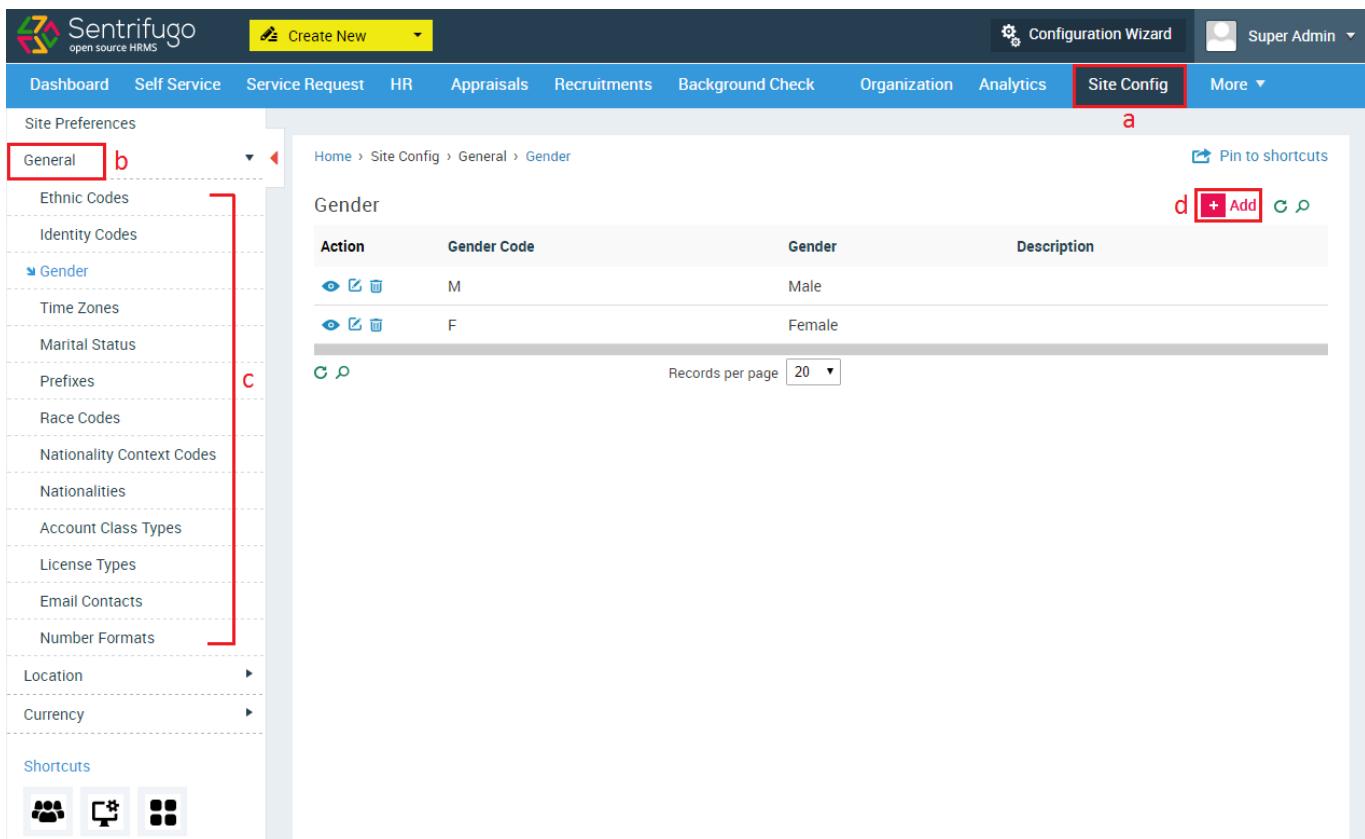
Figure 143

- 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

Home > Site Config > General > Gender

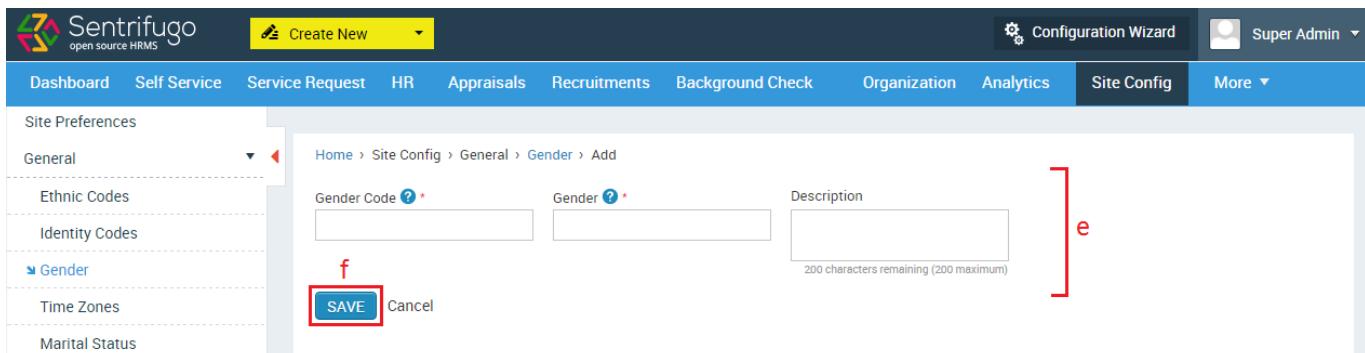
Action	Gender Code	Gender	Description
	M	Male	
	F	Female	

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

Home > Site Config > General > Gender > Add

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

SAVE Cancel **e** **f**

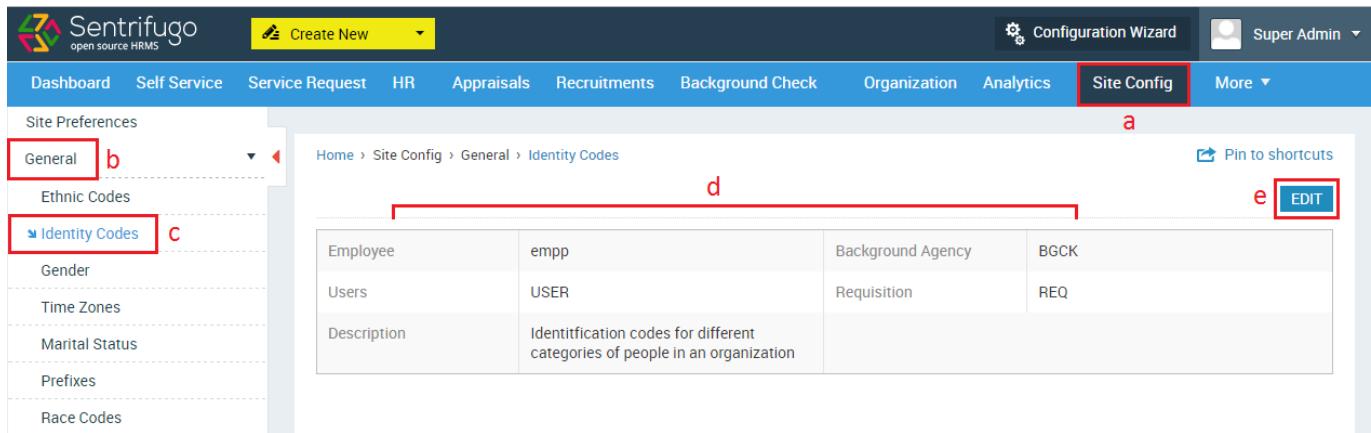
Figure 145

- 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:

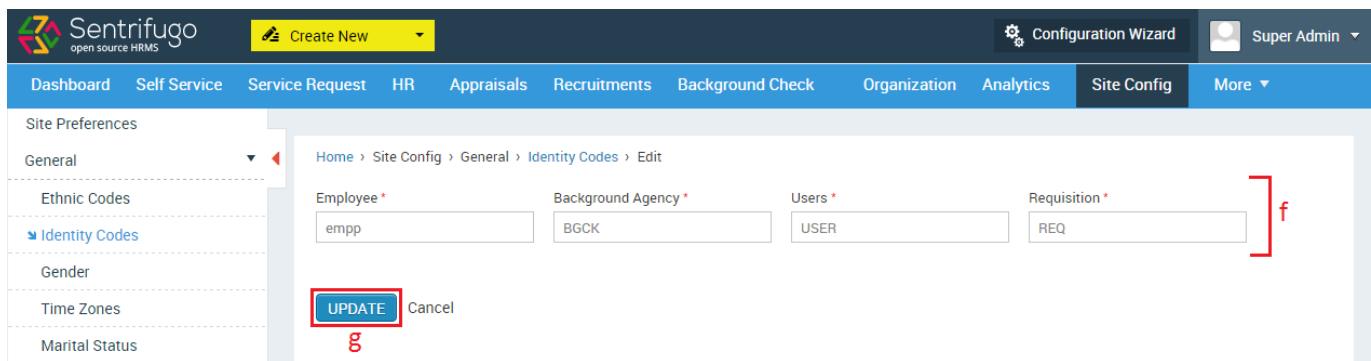
- Top Bar:** Create New, Configuration Wizard, Super Admin.
- Top Menu:** Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (highlighted), More.
- Left Sidebar:** Site Preferences, General (highlighted with red box b), Ethnic Codes, Identity Codes (highlighted with red box c).
- Current Path:** Home > Site Config > General > Identity Codes.
- Content Area:** A table with four rows:

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

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:

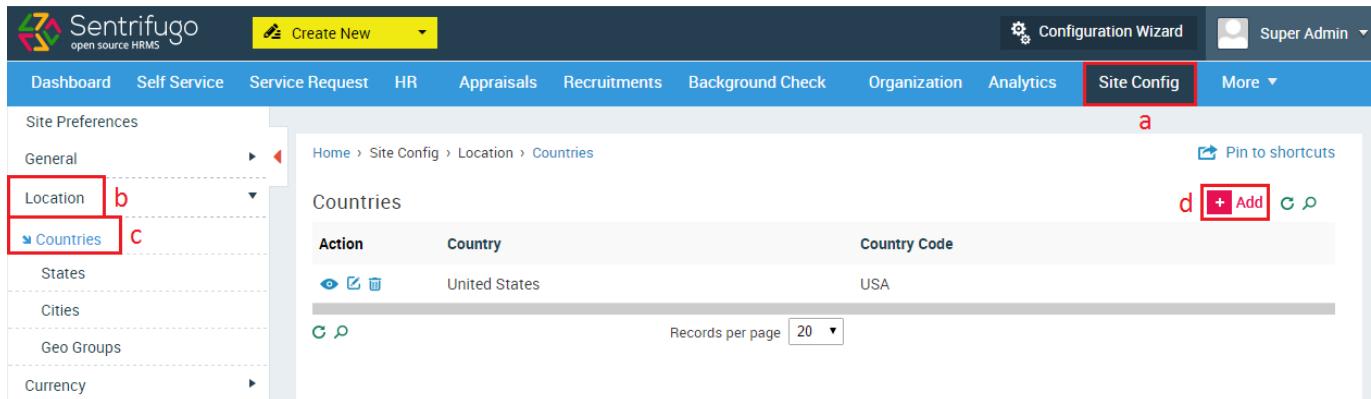
- Top Bar:** Create New, Configuration Wizard, Super Admin.
- Top Menu:** Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (highlighted), More.
- Left Sidebar:** Site Preferences, General, Ethnic Codes, Identity Codes (highlighted with red box f).
- Current Path:** Home > Site Config > General > Identity Codes > Edit.
- Form Fields:** Employee * (empp), Background Agency * (BGCK), Users * (USER), Requisition * (REQ).
- Buttons:** UPDATE (highlighted with red box g), Cancel.

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

Records per page: 20

Figure 148

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

Please refer Figure 149

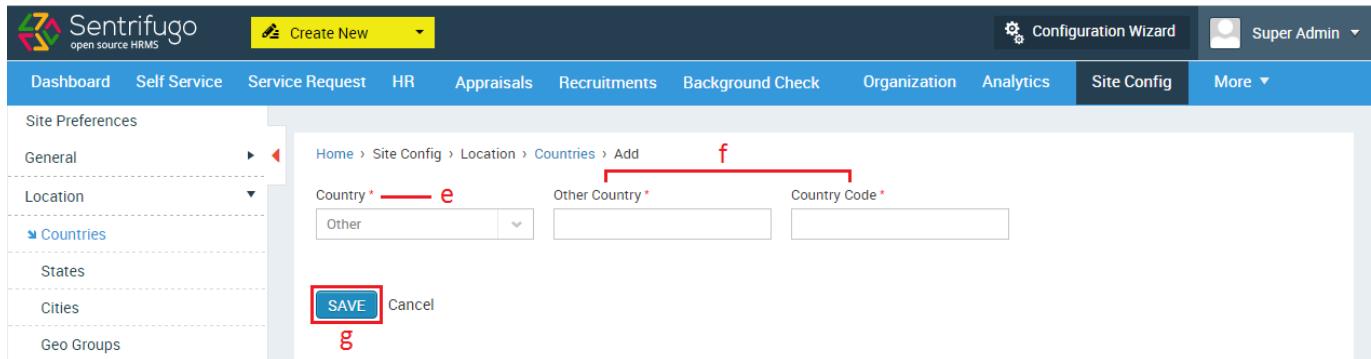


Figure 149

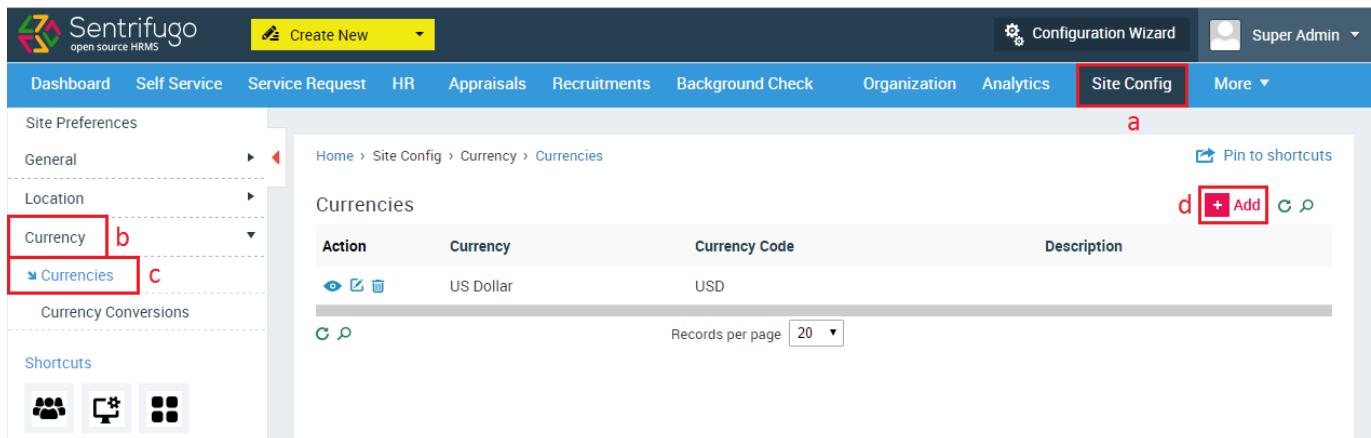
- Select 'Other' in the Country field
- Provide Other Country name and code
- Click **SAVE** button

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

11.5 How do I add Currency and Currency Conversions?

Currencies

Please refer Figure 150

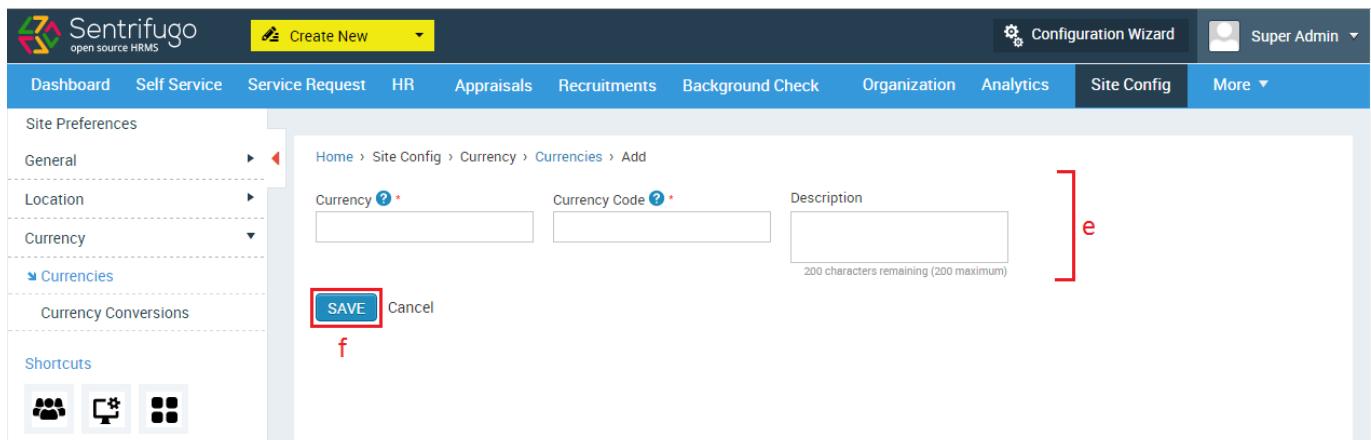


The screenshot shows the Sentrifugo application interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (which is highlighted with a red box 'a'), and More. On the left, a sidebar under 'Site Preferences' shows 'General', 'Location', 'Currency' (highlighted with a red box 'b'), 'Currencies' (highlighted with a red box 'c'), 'Currency Conversions', and 'Shortcuts'. The main content area shows a breadcrumb path 'Home > Site Config > Currency > Currencies'. It lists a single currency entry: Action (eye icon), Currency (US Dollar), Currency Code (USD). There are 'Pin to shortcuts' and '+ Add' buttons in the top right. A 'Records per page' dropdown is set to 20.

Figure 150

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

Please refer Figure 151



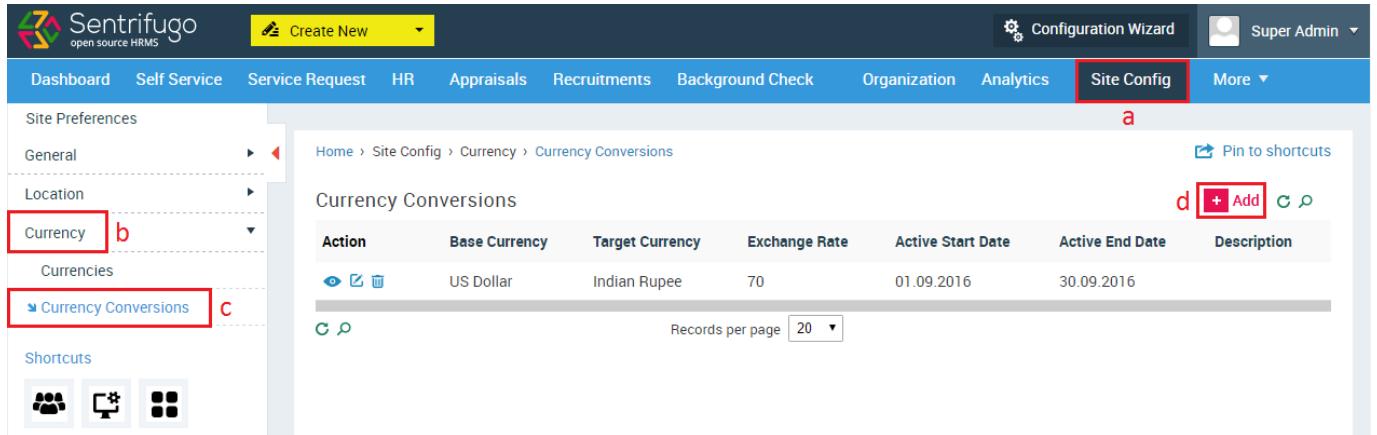
The screenshot shows the 'Add' page for currencies. The left sidebar is identical to Figure 150. The main content area shows a form with 'Currency' (highlighted with a red box 'e') and 'Currency Code' fields, both marked with question marks and asterisks indicating required fields. Below them is a 'Description' text area with a character limit of 200. At the bottom are 'SAVE' and 'Cancel' buttons, with 'SAVE' highlighted with a red box 'f'.

Figure 151

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

Currency Conversions

Please refer Figure 152



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

Figure 152

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

Please refer Figure 153

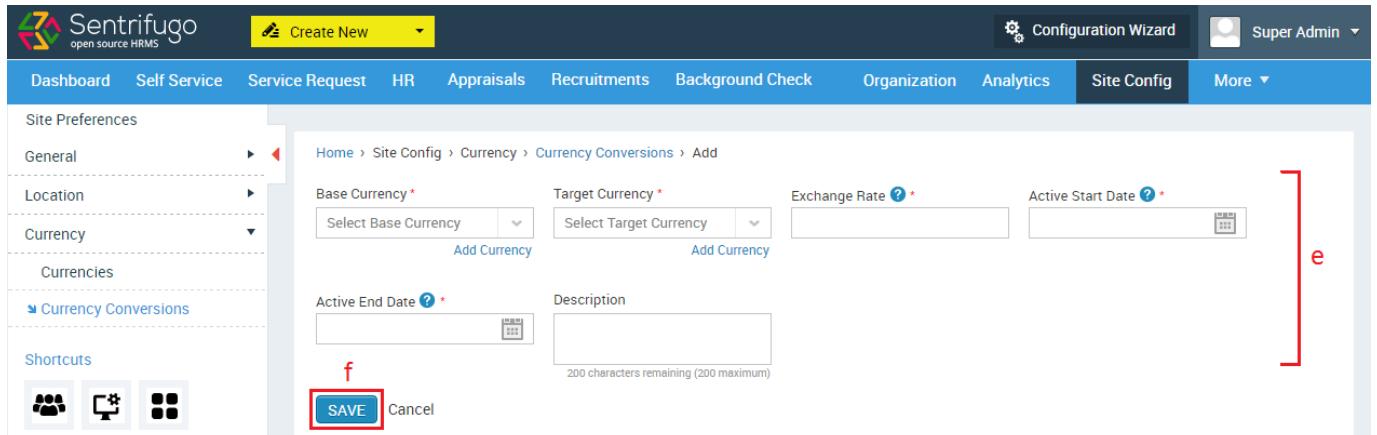


Figure 153

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

12. Modules

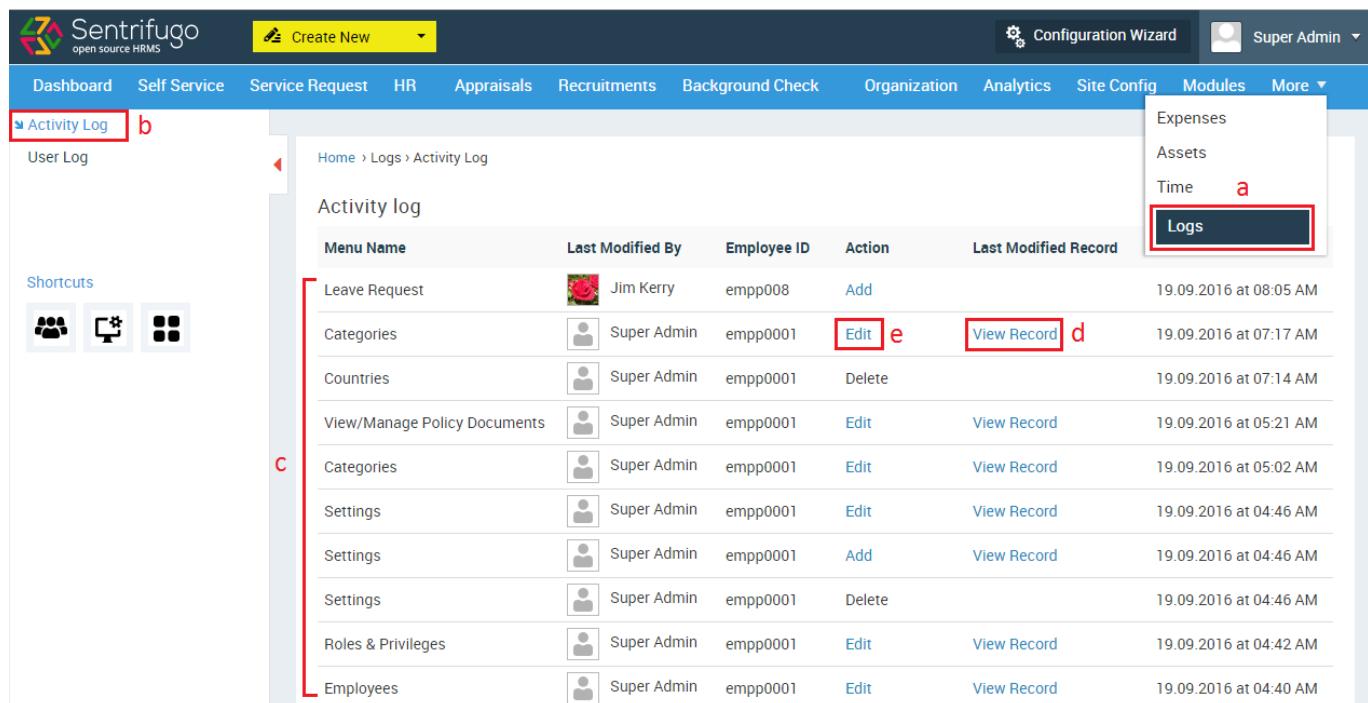
Please refer section [1.3.1 Configuration Wizard: Step 1](#)

13. Logs

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

13.1 How do I view Activity Logs?

Please refer Figure 154



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

Figure 154

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

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

Categories - Edit

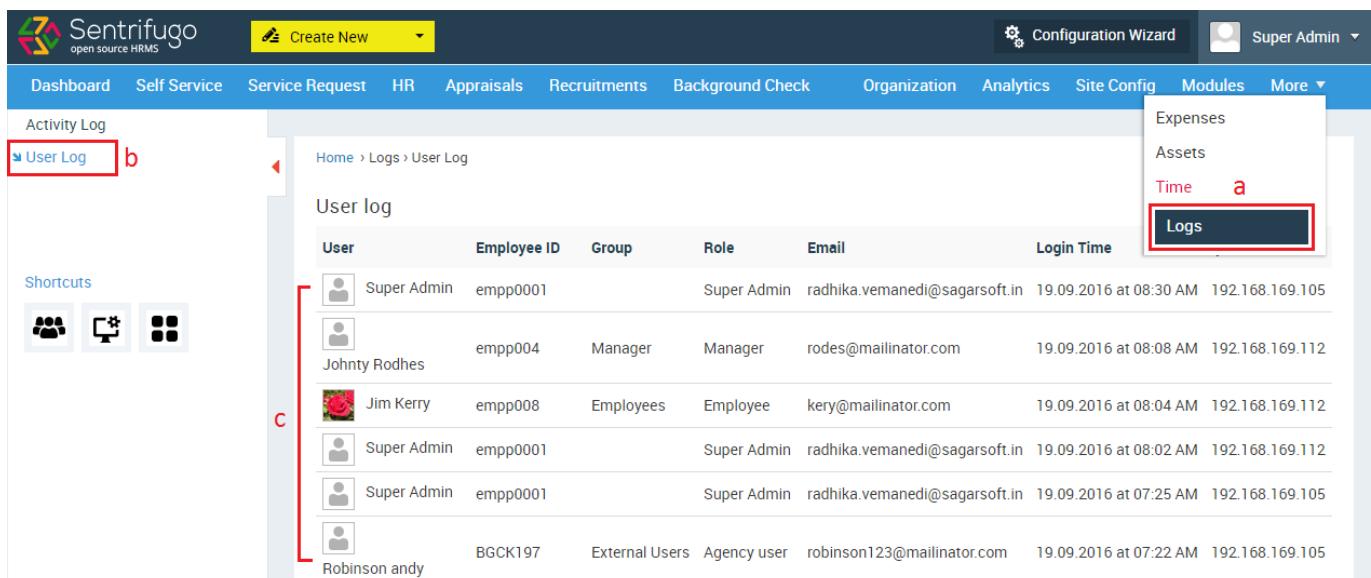
User	Employee ID	Date	Record
 Super Admin	empp0001	19.09.2016 at 07:17 AM	View Record
Records per page <input type="text" value="20"/> ▾			

CLOSE

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

13.2 How do I view User Logs?

Please refer Figure 155



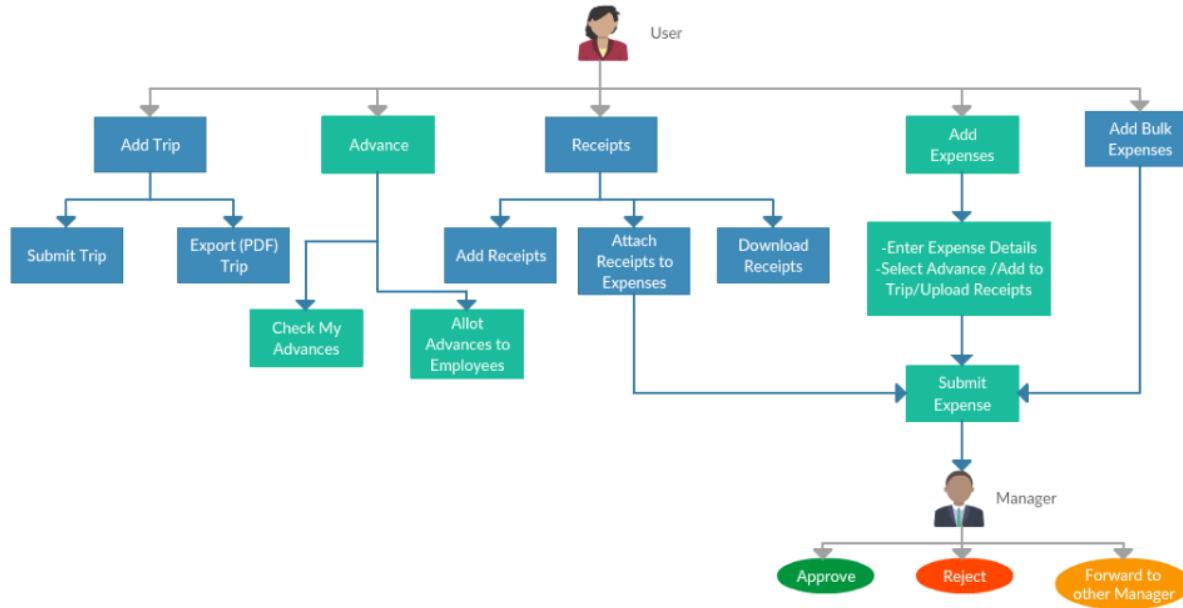
User	Employee ID	Group	Role	Email	Login Time
 Super Admin	empp0001		Super Admin	radhika.vemanedi@sagarsoft.in	19.09.2016 at 08:30 AM 192.168.169.105
 Johnty Rodhes	empp004	Manager	Manager	rodes@mailinator.com	19.09.2016 at 08:08 AM 192.168.169.112
 Jim Kerry	empp008	Employees	Employee	kery@mailinator.com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

Figure 155

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

14. Expenses

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



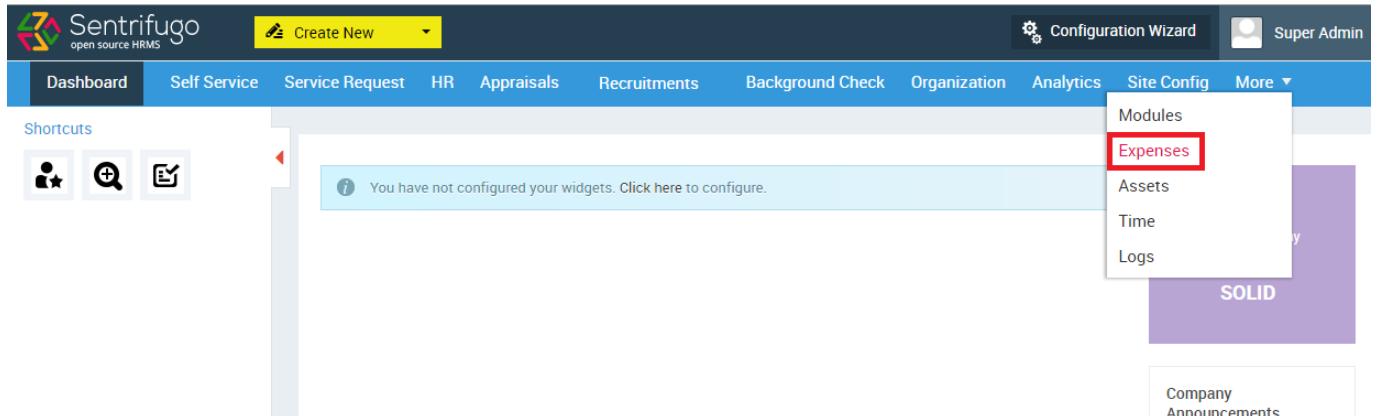
Process Description:

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

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

14.1 How do I add an Expense Category?

Please refer Figure 156

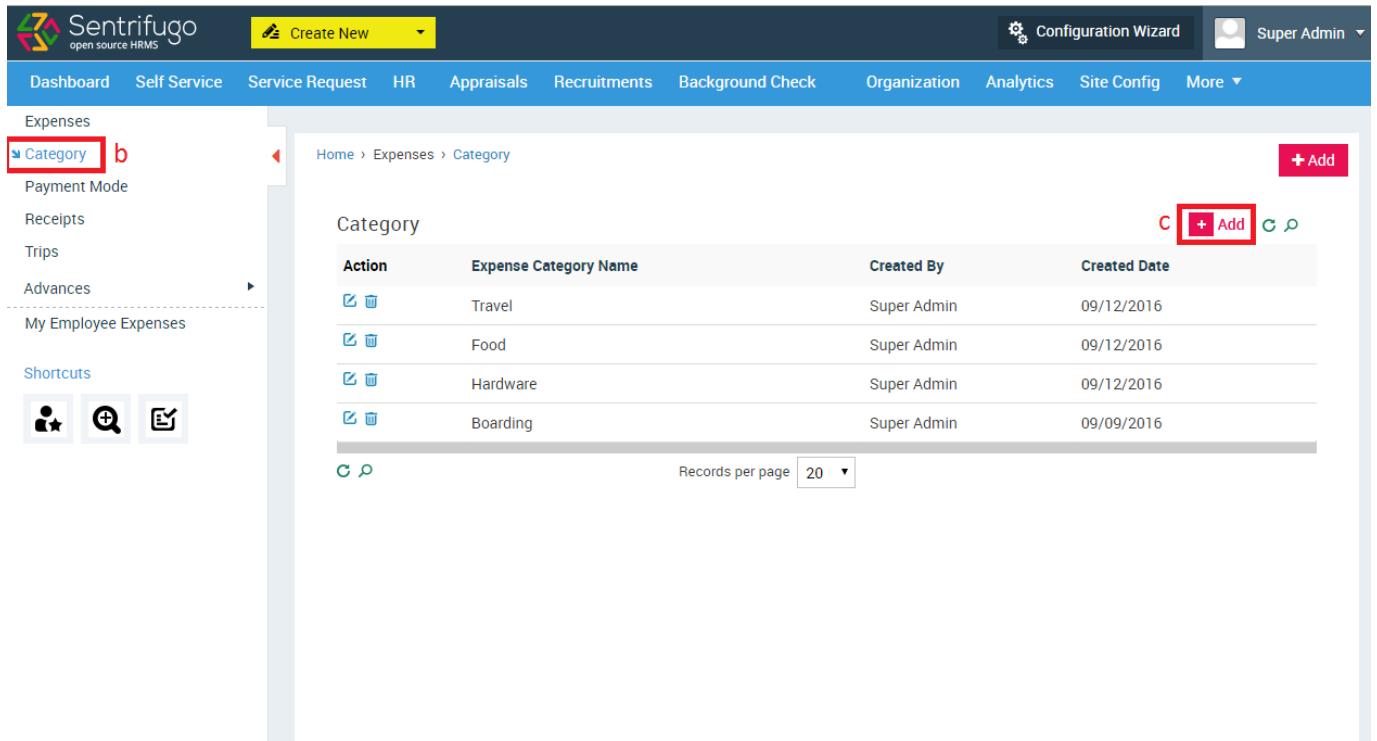


The screenshot shows the Sentrifugo HRMS dashboard. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A 'Create New' button is also present. On the right side,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

Figure 156

- Click **Expenses** in the top menu

Please refer Figure 157



The screenshot shows the 'Expenses' module in Sentrifugo. On the left, there is a sidebar with links for Category (highlighted with a red box), Payment Mode, Receipts, Trips, Advances, and My Employee Expenses. Below this is a 'Shortcuts' section with icons for user profile, search, and edit. The main content area shows a breadcrumb path: Home > Expenses > Category. It displays a table titled 'Category' with columns for Action, Expense Category Name, Created By, and Created Date. The table contains four rows: Travel (Created by Super Admin on 09/12/2016), Food (Created by Super Admin on 09/12/2016), Hardware (Created by Super Admin on 09/12/2016), and Boarding (Created by Super Admin on 09/09/2016). At the bottom right of the table, there is a red box around the '+ Add' button. Navigation controls include a 'Records per page' dropdown set to 20 and a search icon.

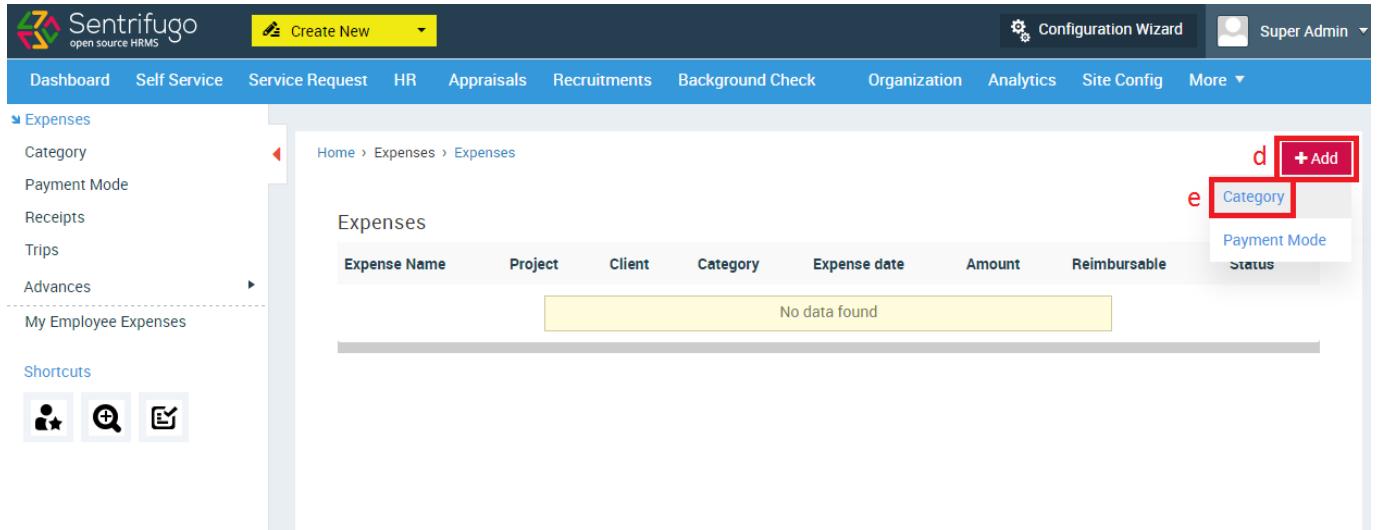
Figure 157

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

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

Or

Please refer Figure 158

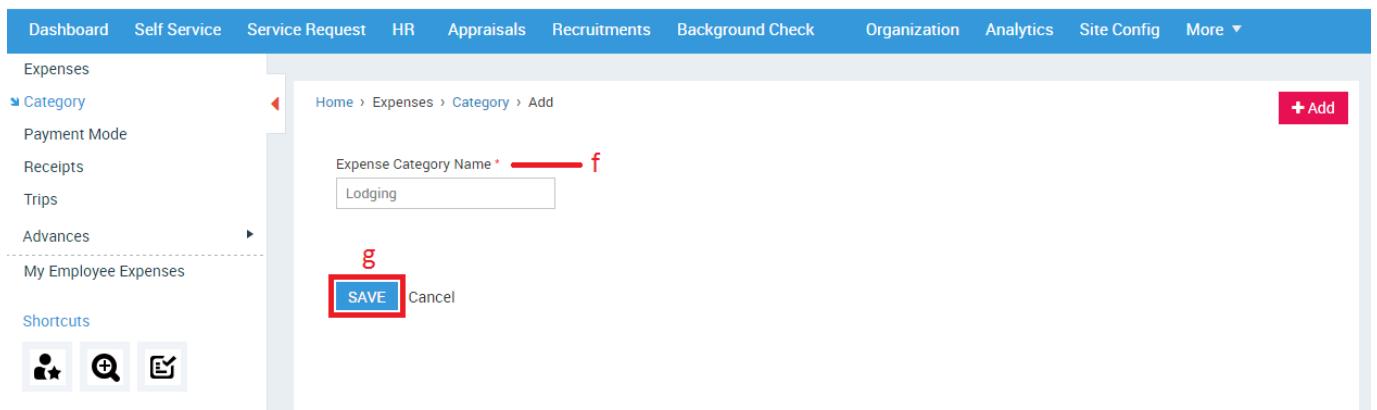


The screenshot shows the Sentrifugo web interface for managing expenses. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A 'Create New' button is visible in the top left. On the left, a sidebar menu lists Expenses, Category, Payment Mode, Receipts, Trips, Advances, and My Employee Expenses. Below the sidebar are three icons: a user profile, a magnifying glass, and a document. The main content area is titled 'Expenses' and displays a table with columns: Expense Name, Project, Client, Category, Expense date, Amount, Reimbursable, and Status. A message 'No data found' is shown in the table body. In the top right corner of the main area, there is a red box labeled 'd' containing a '+ Add' button. To its right, another red box labeled 'e' contains the word 'Category'. Below these buttons is a row of filters: Payment Mode and Status.

Figure 158

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

Please refer Figure 159



The screenshot shows the Sentrifugo web interface for creating a new expense category. The top navigation bar is identical to Figure 158. The left sidebar shows the same menu items, including 'Category', which is currently selected and highlighted in blue. The main content area is titled 'Category' and shows a sub-page for 'Add'. It has a form with a required field 'Expense Category Name' (marked with a red asterisk) containing the value 'Lodging'. Below the input field are two buttons: a blue 'SAVE' button with a red border and a white 'Cancel' button. A red box labeled 'f' is placed over the 'Expense Category Name' input field, and another red box labeled 'g' is placed over the 'SAVE' button.

Figure 159

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

14.2 How do I add a Payment Mode?

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

Please refer Figure 160

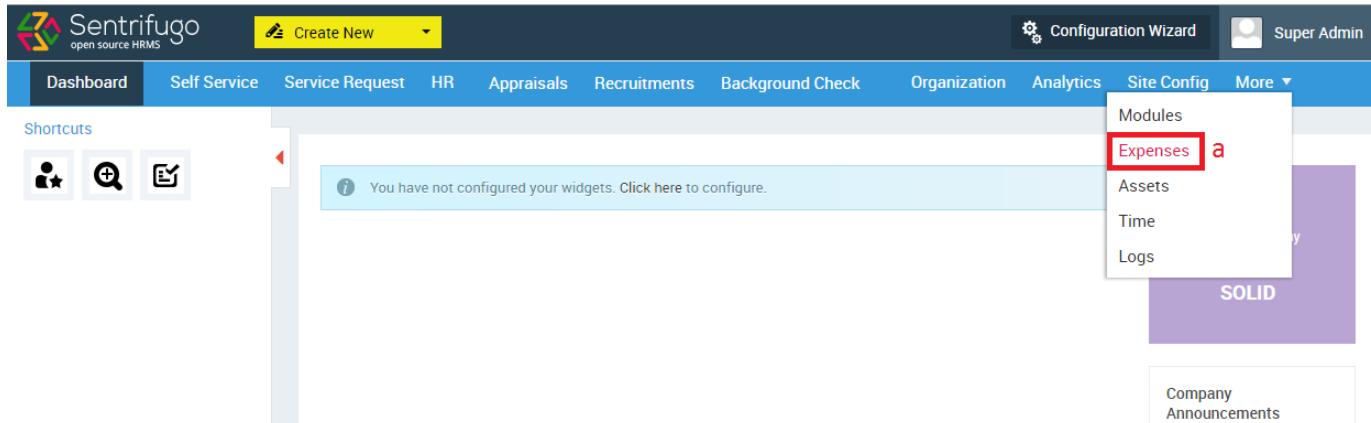
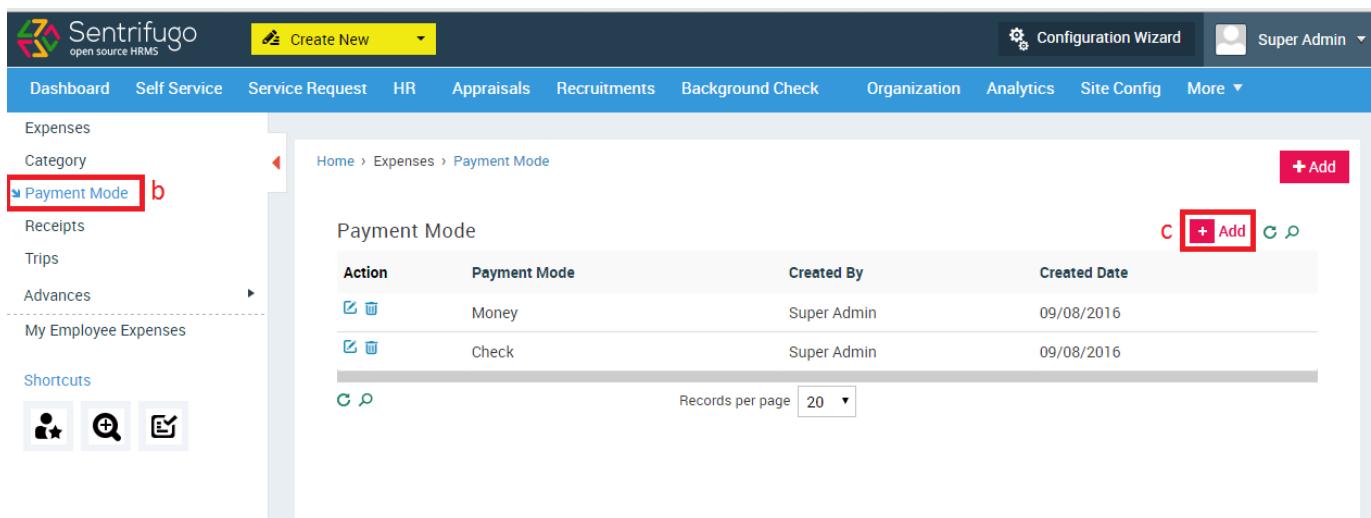


Figure 160

- Click **Expenses** in the top menu

Please refer Figure 161



A screenshot of the Sentrifugo web application showing the "Payment Mode" list. The left sidebar has "Expenses" selected, and "Payment Mode" is highlighted with a red box and labeled 'b'. The main content shows a table of payment modes:

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

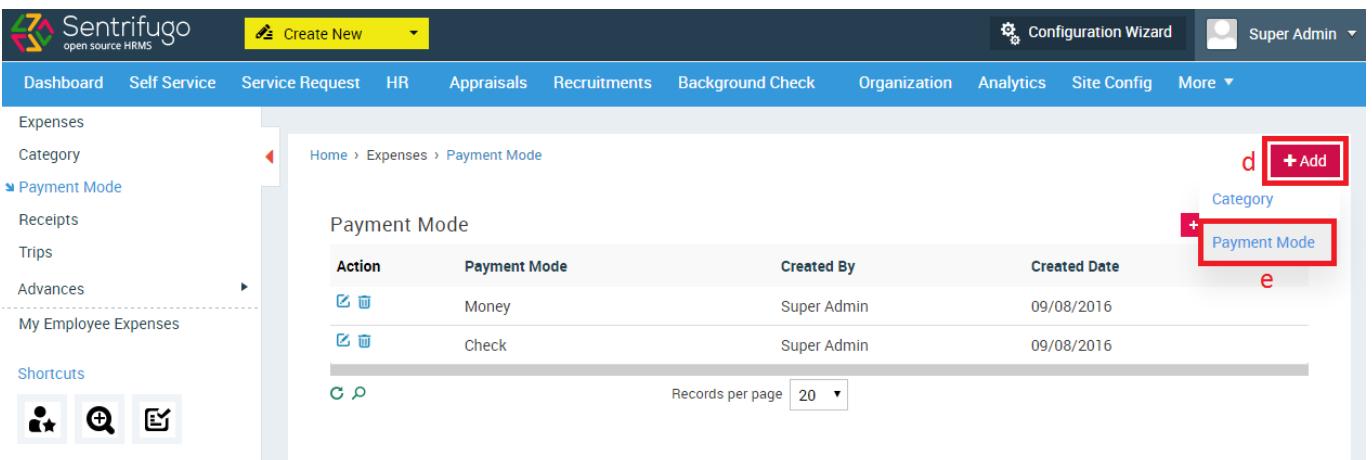
On the right side, there are buttons for "+Add" (highlighted with a red box and labeled 'c') and search/filter icons. The URL in the browser is "Home > Expenses > Payment Mode".

Figure 161

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

Or

Please refer Figure 162



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

Figure 162

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

Please refer Figure 163

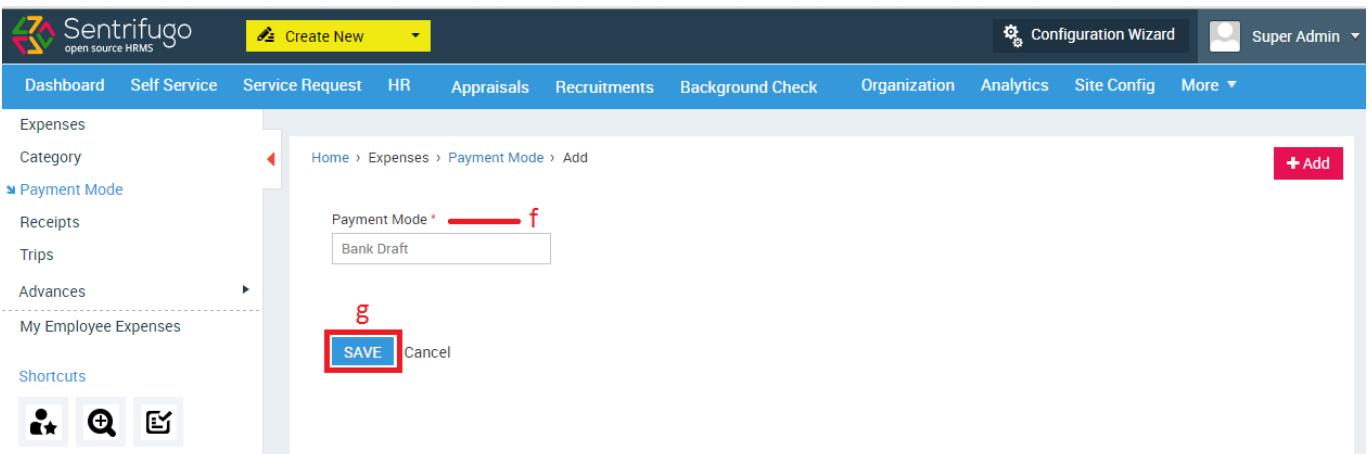


Figure 163

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

14.3 How do I add an Expense?

Please refer Figure 164

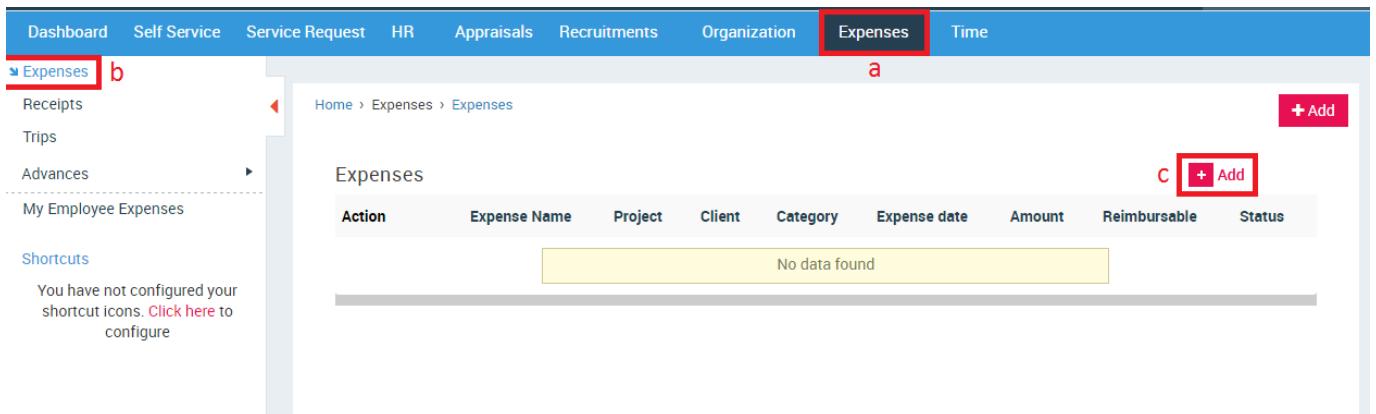


Figure 164

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

Please refer Figure 165

Figure 165

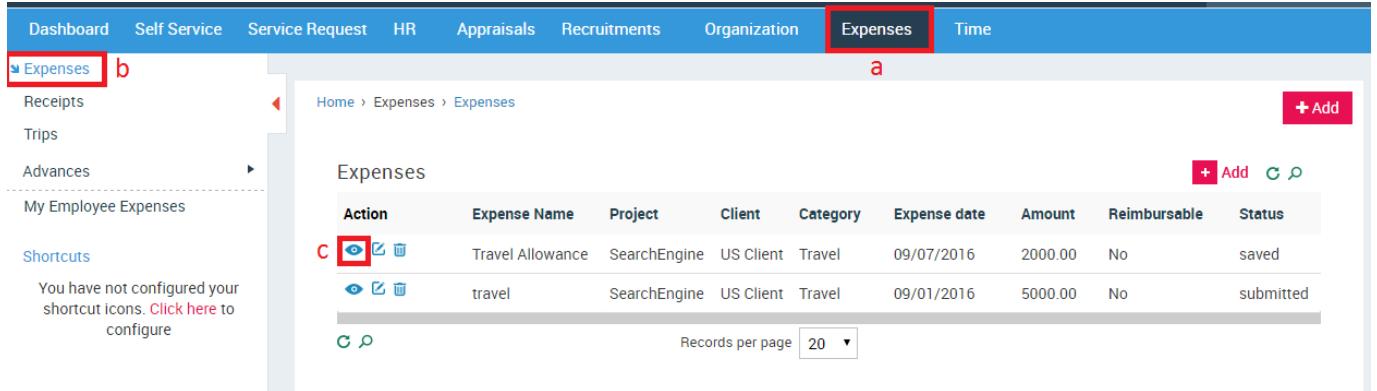
- Enter the required details
- Not functional in the current version
- Employers can pre-allocate a certain amount of money called **Advance** to an employee, which can be used for expenses incurred during trip(s) or for project(s) and client(s).
- Add Trips for managing multiple expenses, clients and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

- i. Click **SAVE** button

14.4 How do I submit an Expense for approval?

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

Please refer Figure 166

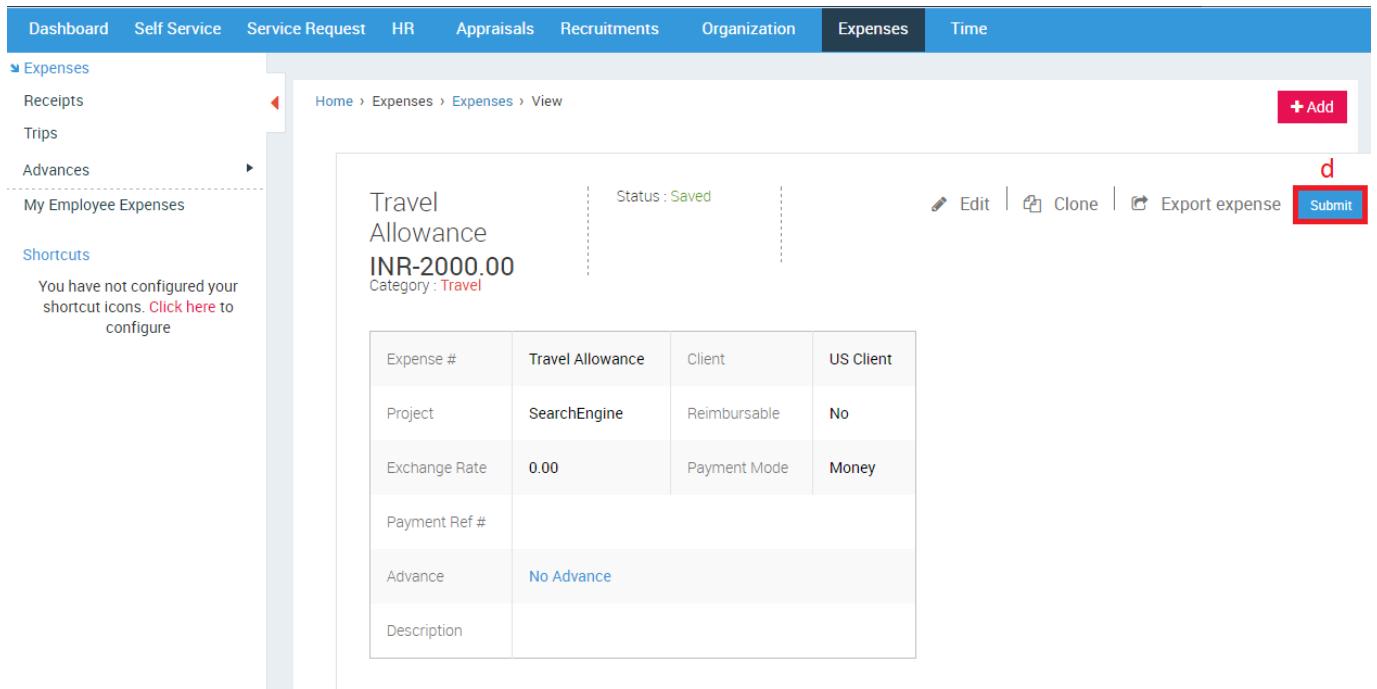


Action	Expense Name	Project	Client	Category	Expense date	Amount	Reimbursable	Status
	Travel Allowance	SearchEngine	US Client	Travel	09/07/2016	2000.00	No	saved
	travel	SearchEngine	US Client	Travel	09/01/2016	5000.00	No	submitted

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



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

Figure 167

- d. Click **Submit** button

A confirmation message will be displayed.

Please refer Figure 168

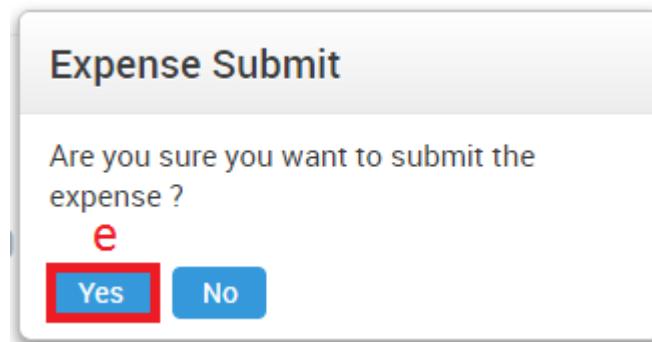


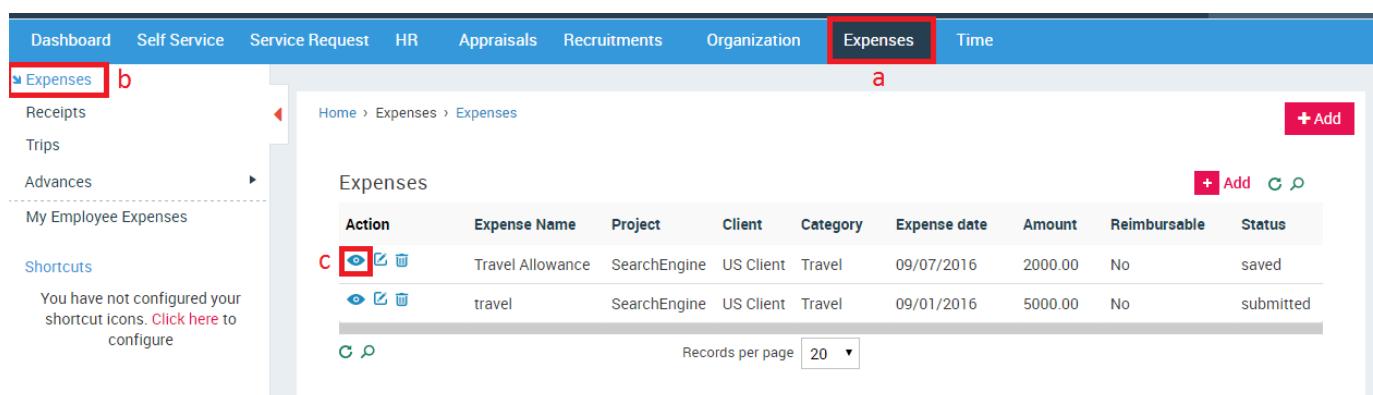
Figure 168

- e. Click **Yes**

14.5 How do I export an Expense?

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

Please refer Figure 169

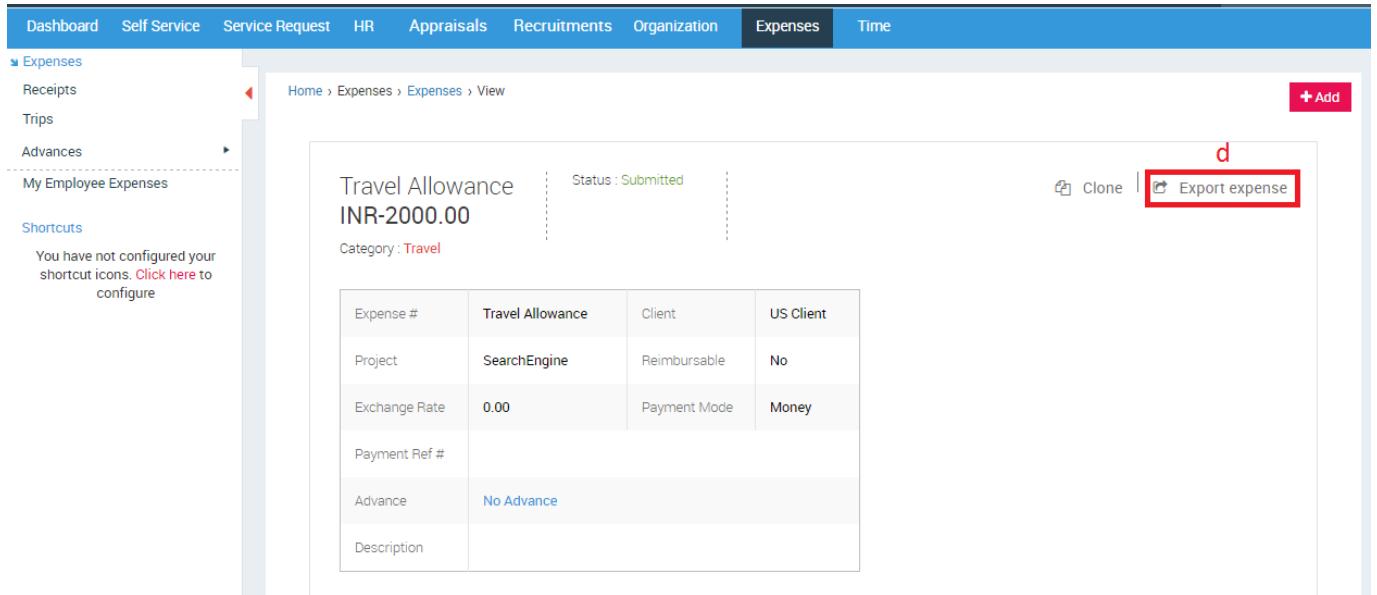


The screenshot shows the Sentrifugo interface for managing expenses. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (which is highlighted with a red box), and Time. A left sidebar panel, also with a red box around its header, lists Receipts, Trips, Advances, and My Employee Expenses. The main content area displays a list of expenses with columns for Action, Expense Name, Project, Client, Category, Expense date, Amount, Reimbursable, and Status. Two entries are shown: "Travel Allowance" and "travel". The "Travel Allowance" entry has a status of "saved". At the bottom of the list are buttons for "Add" and "Search".

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



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

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

At the top right of the expense view, there are 'Clone' and 'Export expense' buttons. The 'Export expense' button is highlighted with a red box.

Figure 170

- Click Export expense button

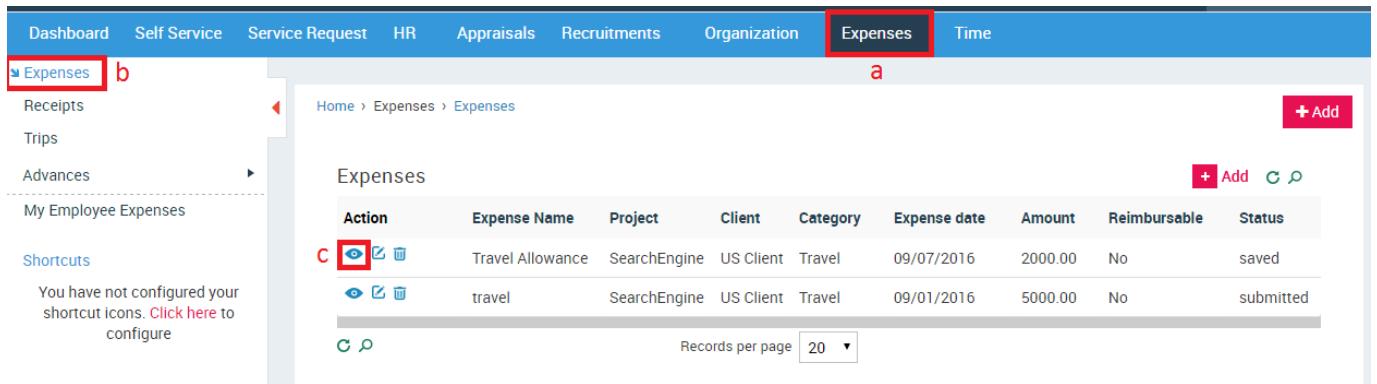
An expense report in PDF format will be downloaded.

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



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (selected and highlighted in dark blue), and Time. On the left, a sidebar menu includes Expenses (highlighted with a red box), Receipts, Trips, Advances, My Employee Expenses, and Shortcuts (with a note about configuring shortcut icons). The main content area shows a table of expenses:

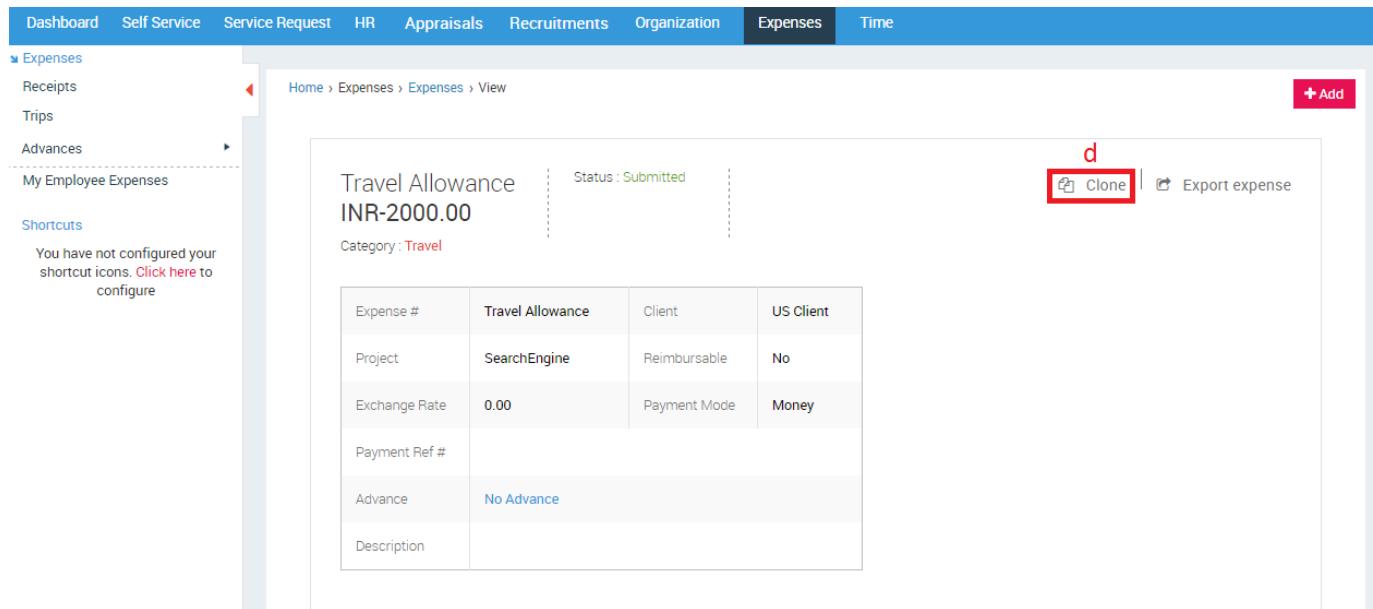
Action	Expense Name	Project	Client	Category	Expense date	Amount	Reimbursable	Status
	Travel Allowance	SearchEngine	US Client	Travel	09/07/2016	2000.00	No	saved
	travel	SearchEngine	US Client	Travel	09/01/2016	5000.00	No	submitted

At the bottom left of the expense list, there are 'Add' and 'Search' buttons. In the first row of the table, the 'View' button in the 'Action' column is highlighted with a red box.

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



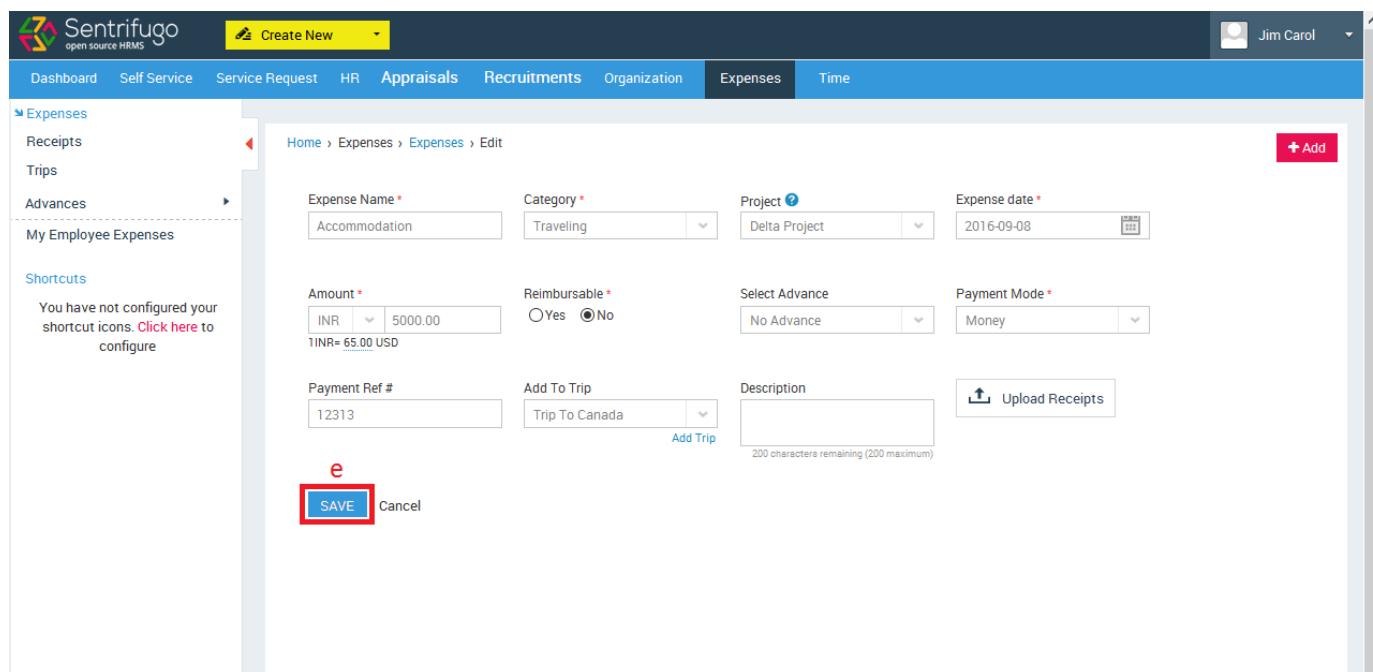
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. The Expenses tab is selected. On the left, a sidebar lists Receipts, Trips, Advances, and My Employee Expenses. A 'Shortcuts' section indicates no configured icons and provides a link to configure them. The main content area displays a travel allowance expense with the ID INR-2000.00. The status is 'Submitted'. The category is 'Travel'. The expense details table includes rows for Project (SearchEngine), Exchange Rate (0.00), Payment Ref #, Advance (No Advance), and Description. To the right of the expense view are buttons for 'Clone' (highlighted with a red box and labeled 'd') and 'Export expense'.

Figure 172

d. Click **Clone** option

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

Please refer Figure 173



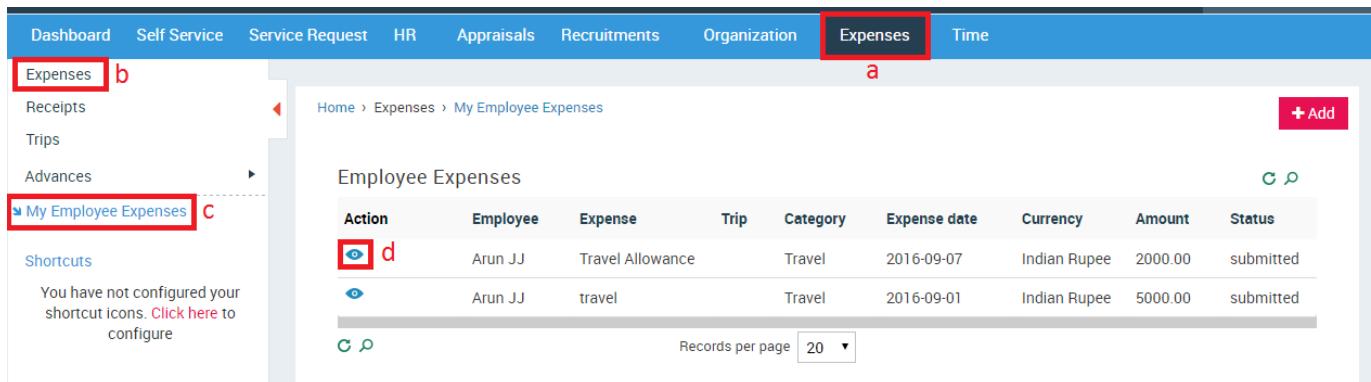
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. The Expenses tab is selected. On the left, a sidebar lists Receipts, Trips, Advances, and My Employee Expenses. A 'Shortcuts' section indicates no configured icons and provides a link to configure them. The main content area shows an 'Edit' screen for a new expense. The form fields include: Expense Name * (Accommodation), Category * (Traveling), Project * (Delta Project), Expense date * (2016-09-08), Amount * (INR 5000.00, 1INR= 65.00 USD), Reimbursable * (Yes), Select Advance (No Advance), Payment Mode * (Money), Payment Ref # (12313), Add To Trip (Trip To Canada), Description, and Upload Receipts. The 'SAVE' button is highlighted with a red box and labeled 'e'.

Figure 173

- e. Click **SAVE** button

14.7 How do I approve/reject Employee Expenses?

Please refer Figure 174



The screenshot shows the Sentrifugo web interface. The top navigation bar has tabs: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (which is highlighted in red), and Time. On the left, there's a sidebar with links: Expenses (highlighted in red), Receipts, Trips, Advances, and My Employee Expenses (highlighted in red). Below these are Shortcut icons, which are currently unconfigured. The main content area shows a list of 'Employee Expenses' with the following columns: Action, Employee, Expense, Trip, Category, Expense date, Currency, Amount, and Status. Two entries are listed:

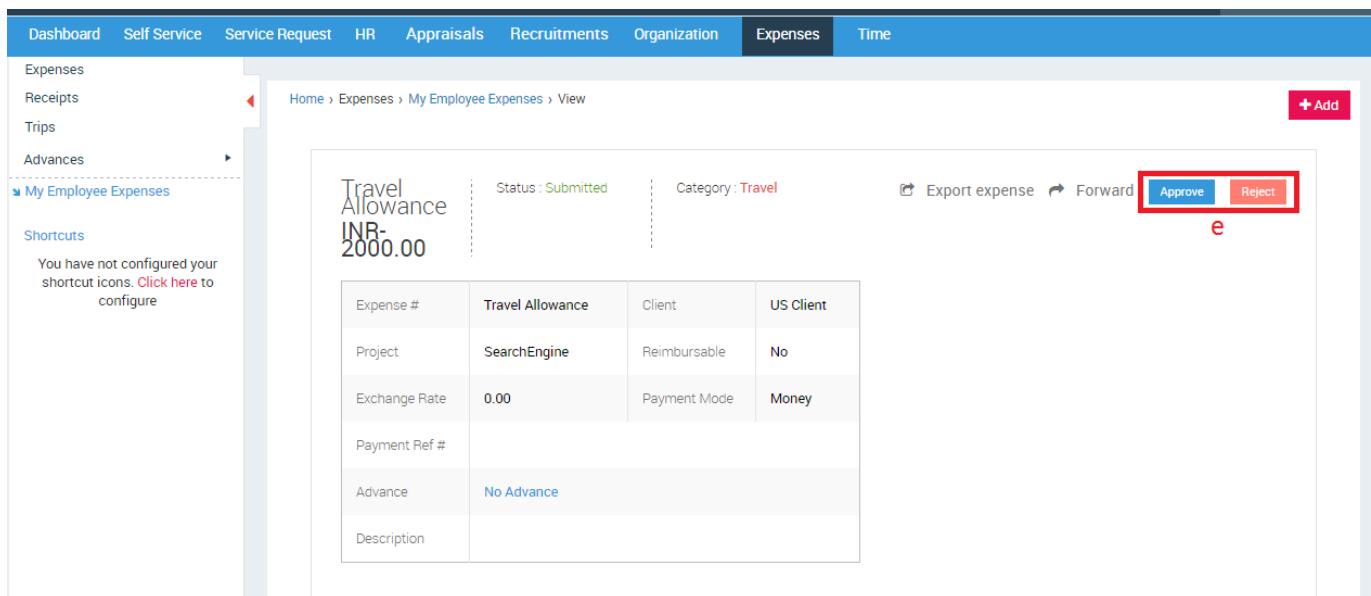
Action	Employee	Expense	Trip	Category	Expense date	Currency	Amount	Status
	Arun JJ	Travel Allowance		Travel	2016-09-07	Indian Rupee	2000.00	submitted
	Arun JJ	travel		Travel	2016-09-01	Indian Rupee	5000.00	submitted

At the bottom right of the content area, there are 'Records per page' dropdown and search/filter icons.

Figure 174

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

Please refer Figure 175



This screenshot shows a detailed view of an expense item. The top navigation bar and sidebar are identical to Figure 174. The main content area displays a single expense entry with the following details:

Travel Allowance INR-2000.00

Status: Submitted | Category: Travel

Actions: Export expense, Forward, **Approve** (highlighted in red), and **Reject**.

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

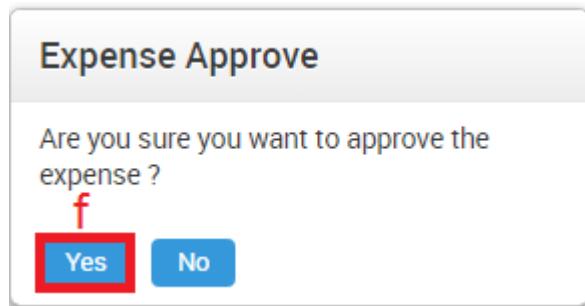
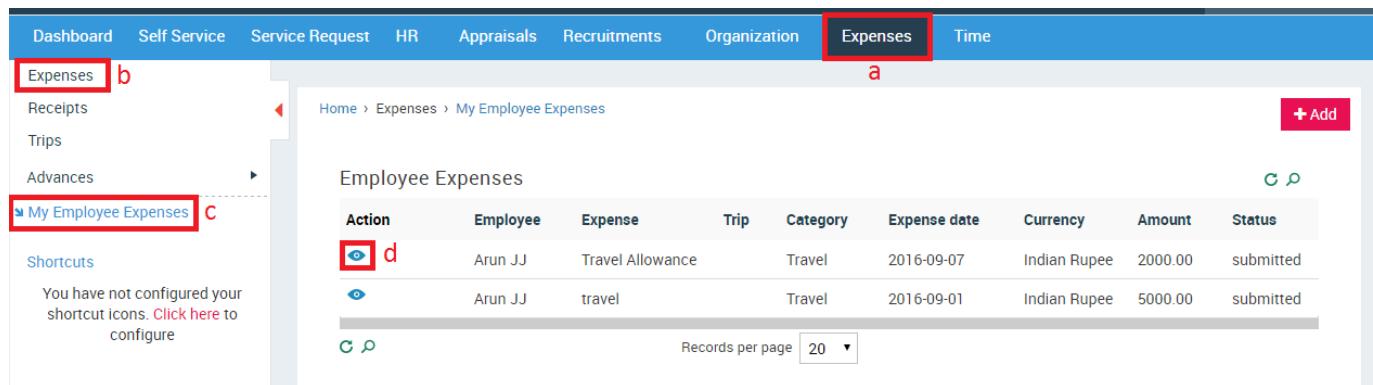


Figure 176

- Click **Yes** Button

14.8 How do I forward an Expense to another Manager?

Please refer Figure 177



The screenshot shows the Sentrifugo interface. The top navigation bar has tabs: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (highlighted with a red box), and Time. The left sidebar has a menu: Expenses (highlighted with a red box), Receipts, Trips, Advances, and My Employee Expenses (highlighted with a red box). A red letter "b" is placed over the "Expenses" tab. A red letter "a" is placed over the "Expenses" tab in the top bar. A red letter "c" is placed over the "My Employee Expenses" link in the sidebar. A red letter "d" is placed over the "View" icon in the table action column. The main content area shows a list of "Employee Expenses" with the following data:

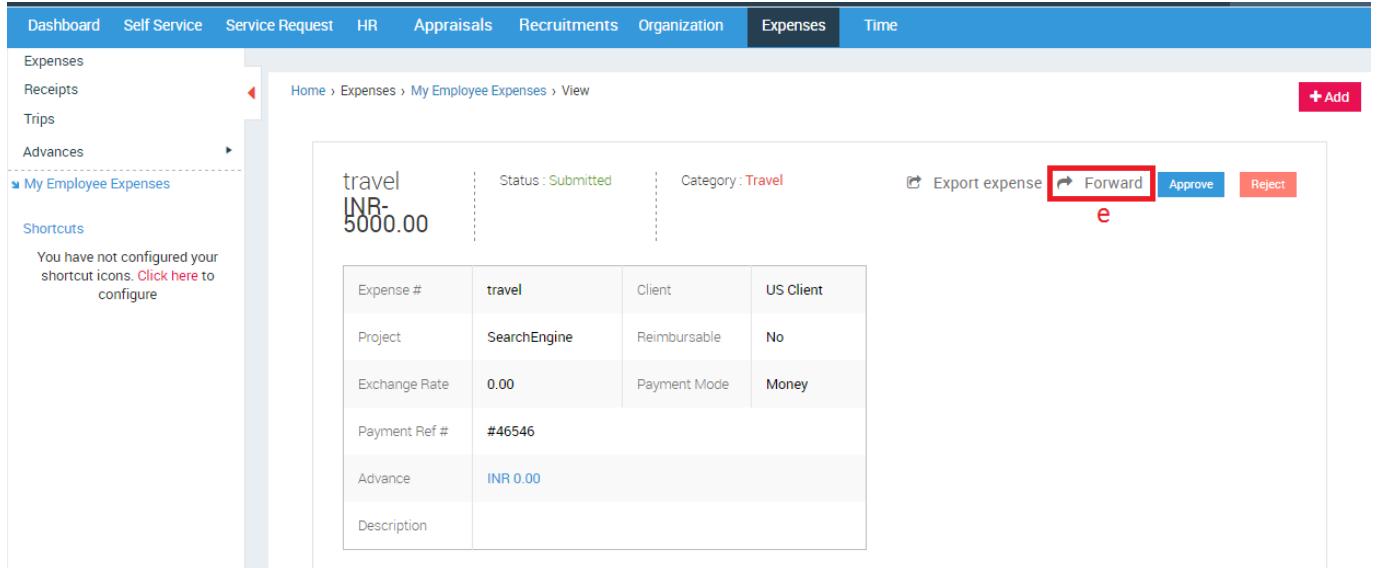
Action	Employee	Expense	Trip	Category	Expense date	Currency	Amount	Status
	Arun JJ	Travel Allowance	Travel	Travel	2016-09-07	Indian Rupee	2000.00	submitted
	Arun JJ	travel	Travel	Travel	2016-09-01	Indian Rupee	5000.00	submitted

Below the table are links for "Records per page" and "20".

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 Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (selected), and Time. On the left, a sidebar lists Expenses, Receipts, Trips, and Advances, with 'My Employee Expenses' selected. A message in the sidebar says, 'You have not configured your shortcut icons. Click here to configure.' The main content area displays a travel expense entry for 'travel' worth 'INR-5000.00'. The status is 'Submitted' and the category is 'Travel'. Below the summary, a table provides detailed information:

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

At the top right of the expense view, there are buttons for Export expense, Forward (highlighted with a red box), Approve, and Reject.

Figure 178

- e. Click **Forward** option

A small pop up window will open

Please refer Figure 178

Forward expense to X

John Michael	 Forward
Ron Born	 Forward f
Rose Mary	 Forward
Jim Carol	 Forward

[View More](#)

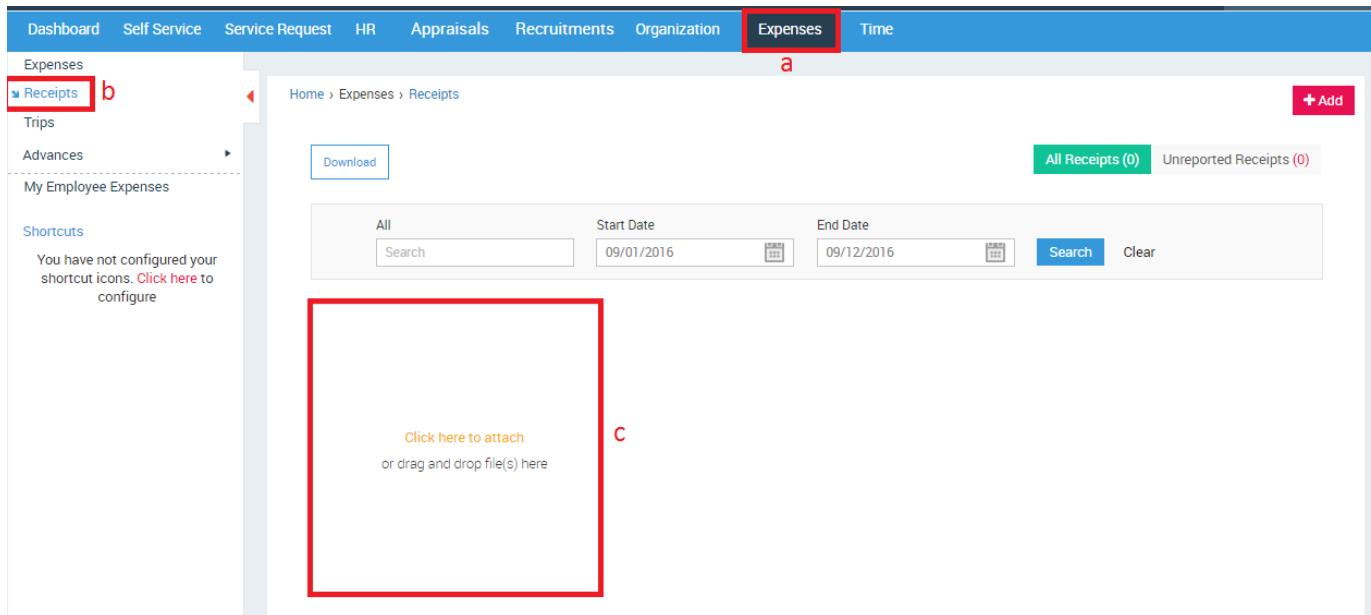
Figure 178

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

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

14.9 How do I upload Receipts?

Please refer Figure 179



The screenshot shows the Sentrifugo web interface. At the top, there is a blue header bar with several menu items: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (which is highlighted with a red box), and Time. Below the header, on the left, is a sidebar with a tree view. The 'Receipts' node under the 'Expenses' category is also highlighted with a red box. The main content area shows a breadcrumb path: Home > Expenses > Receipts. There is a 'Download' button, a search bar with fields for 'All', 'Start Date' (09/01/2016), and 'End Date' (09/12/2016), and buttons for 'Search' and 'Clear'. A large red box labeled 'c' covers the central area where receipts can be uploaded, with the text 'Click here to attach or drag and drop file(s) here' visible.

Figure 179

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

14.10 How do I download my Receipts?

Please refer Figure 180

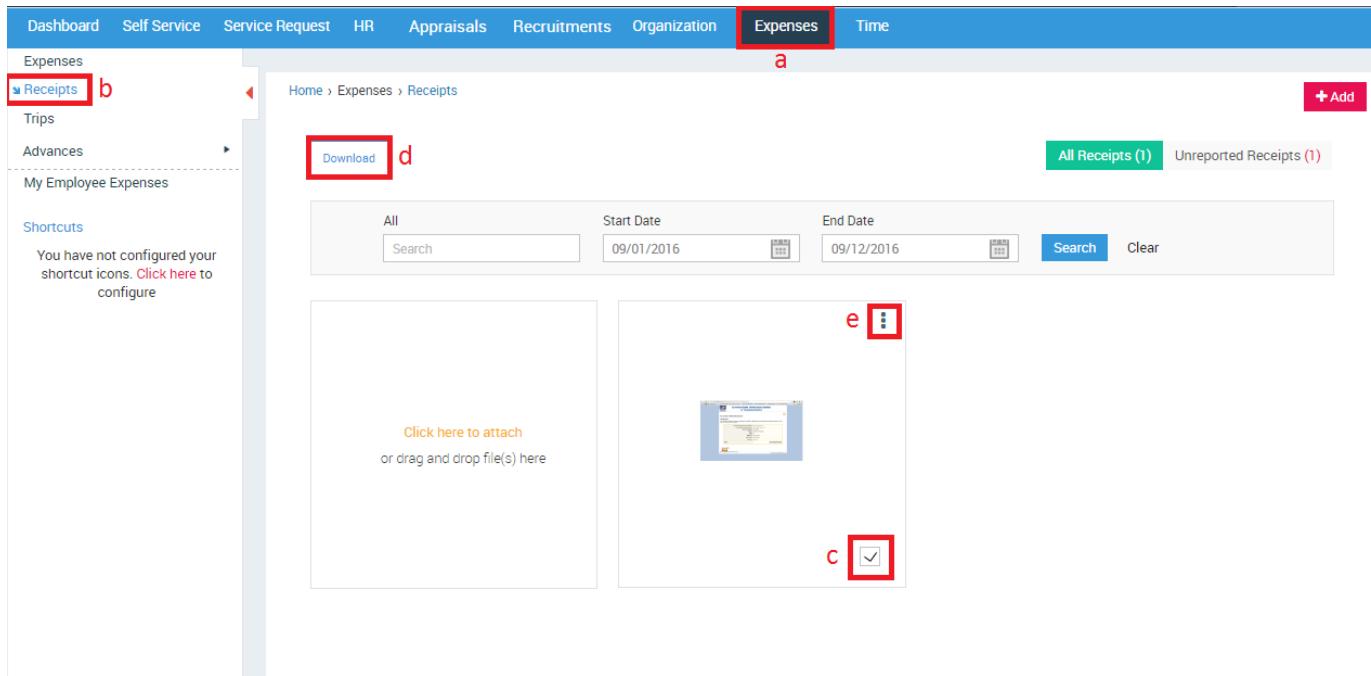


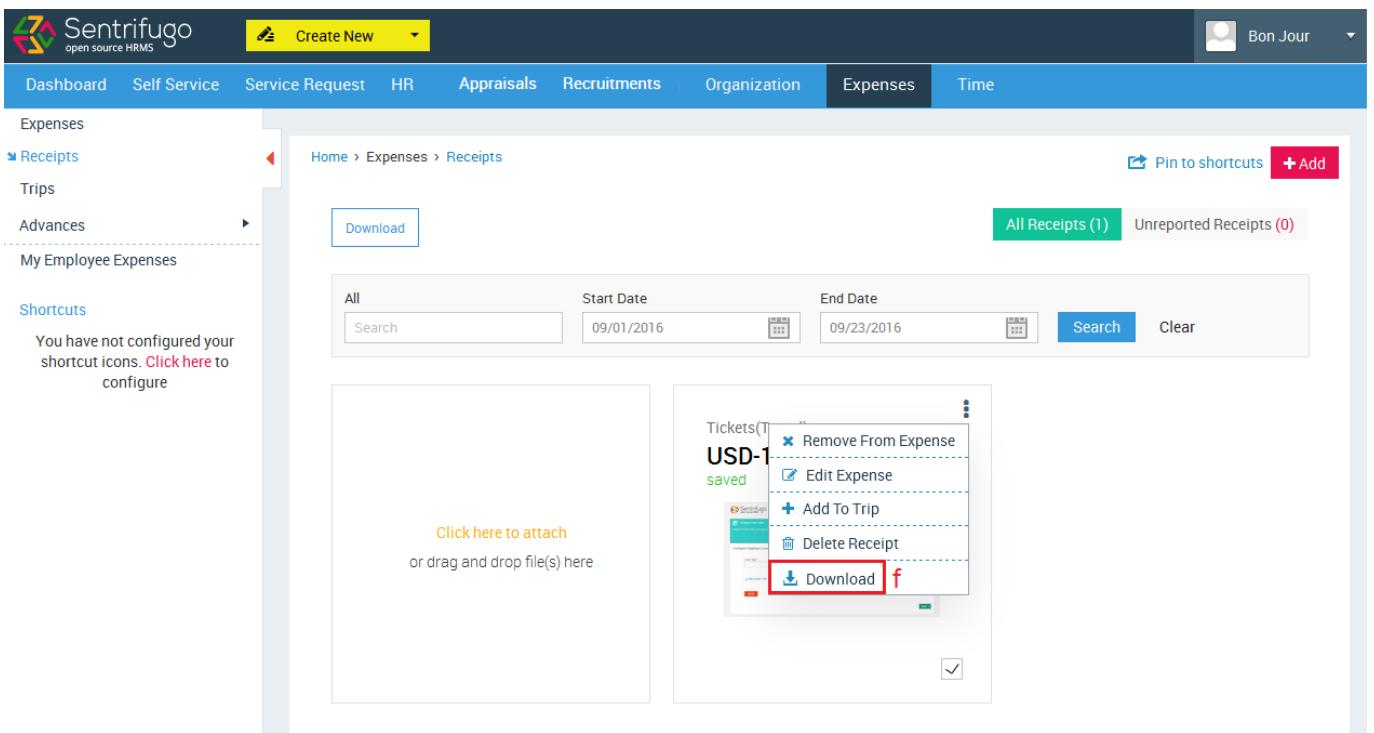
Figure 180

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

Or

- e. Click **More Action** icon

Please refer Figure 181



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

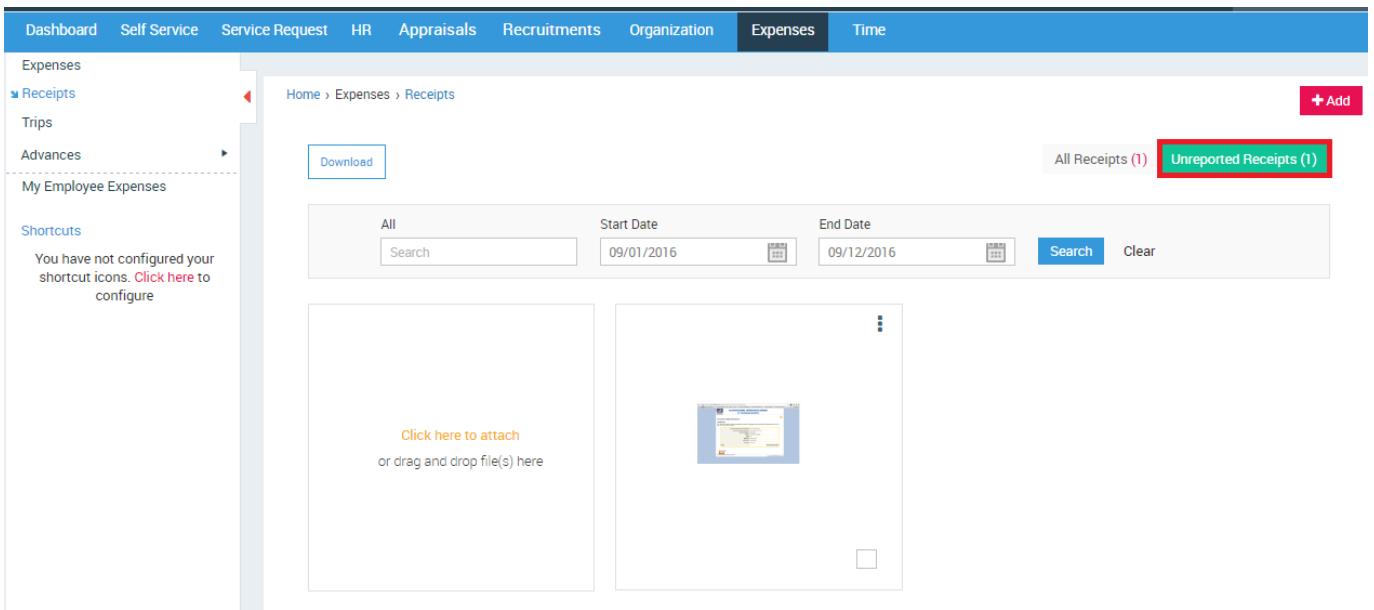
Figure 181

f. Select Download

14.11 What are Unreported Receipts?

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

Please refer Figure 182



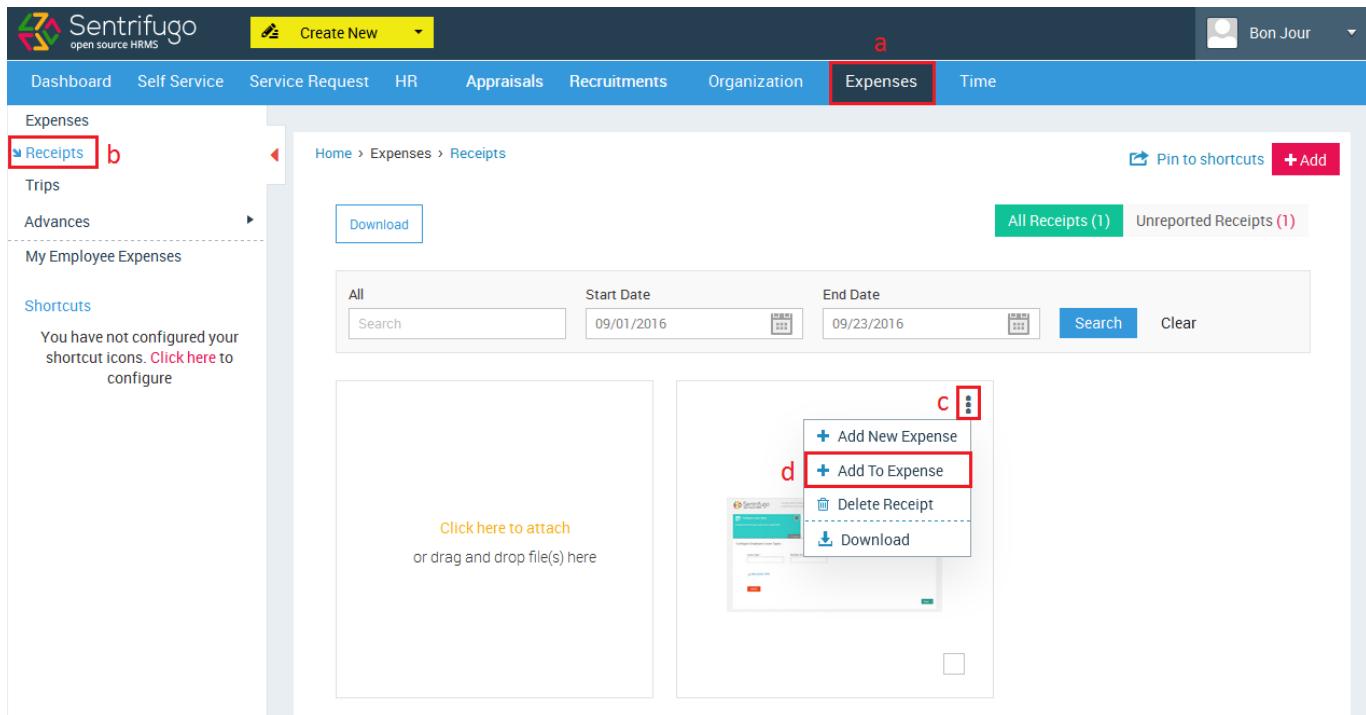
This screenshot is similar to Figure 181 but shows the "Unreported Receipts" tab selected in the top navigation bar. The main area shows a breadcrumb path: Home > Expenses > Receipts. There are buttons for Download, Pin to shortcuts, and Add. Below these are filters for Start Date (09/01/2016) and End Date (09/12/2016), and buttons for Search and Clear. A large text area says "Click here to attach or drag and drop file(s) here". To the right, a receipt is shown with a context menu, but the "Download" option is not highlighted. At the bottom right of the receipt area is an unchecked checkbox.

Figure 182

14.12 How do I add Receipts to Expenses/Trips?

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

Please refer Figure 183



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Create New, Bon Jour, Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (which is highlighted with a red box), and Time. On the left, a sidebar lists Receipts (highlighted with a red box), Trips, Advances, and My Employee Expenses. Under Shortcuts, there's a note about configuring icons. The main content area shows a breadcrumb path: Home > Expenses > Receipts. It features a search bar, date filters for Start Date (09/01/2016) and End Date (09/23/2016), and buttons for Download, Pin to shortcuts, and Add. Below these are two large input fields for attachments, with instructions to click or drag files. A context menu is open over a thumbnail of a receipt, listing options: Add New Expense, Add To Expense (highlighted with a red box), Delete Receipt, and Download.

Figure 183

- Click **Expenses** in the top menu
- Click **Receipts** on the left menu panel
- Click **More Actions** icon
- Click **Add to Expense**

A small pop up window will open.

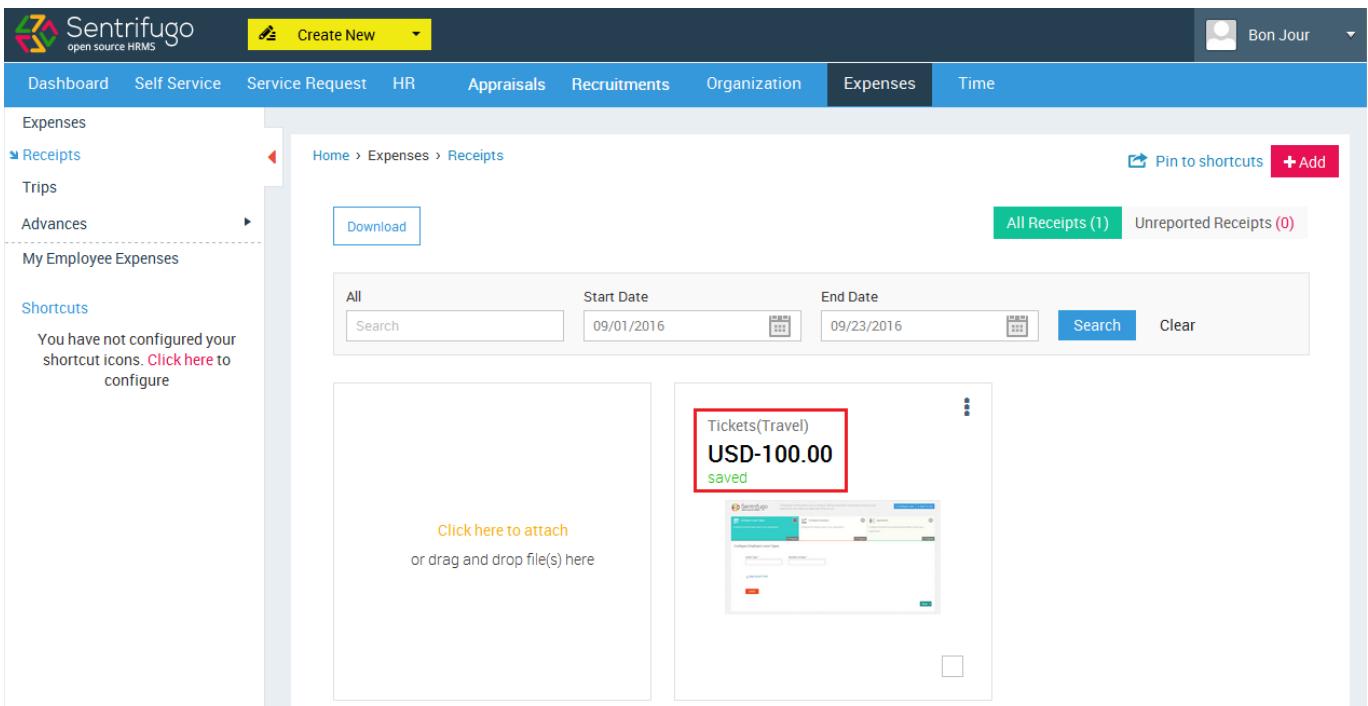
Please refer Figure 184



Figure 184

e. Click Add to Expense.

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



The screenshot shows the "Receipts" section of the "Expenses" module. On the right, a receipt for "Tickets(Travel)" worth "USD-100.00" is displayed with a red box around the amount. Below it, a message says "saved". On the left, a sidebar lists "Receipts", "Trips", and "Advances". A note at the bottom says "You have not configured your shortcut icons. Click here to configure".



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

14.13 How do I delete a Receipt?

Please refer Figure 185

The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (which is highlighted with a red box), Time, and a user profile for 'Bon Jour'. On the left, a sidebar has 'Receipts' selected (highlighted with a red box b). The main content area shows a list of receipts with a search bar and date filters. A context menu (c) is open over a specific receipt, listing options: Remove From Expense, Edit Expense, Add To Trip, Delete Receipt (highlighted with a red box d), and Download. The receipt details shown are USD-1 saved.

Figure 185

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

A confirmation message will be displayed.

Please refer Figure 186

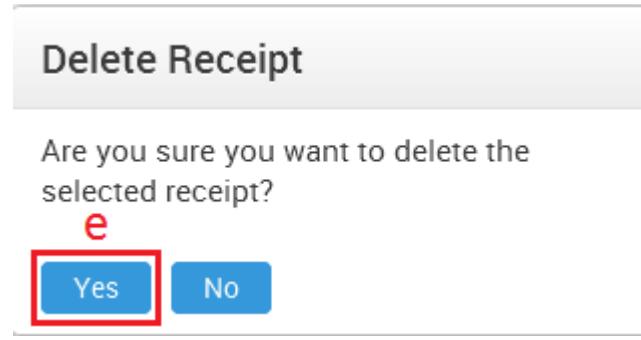


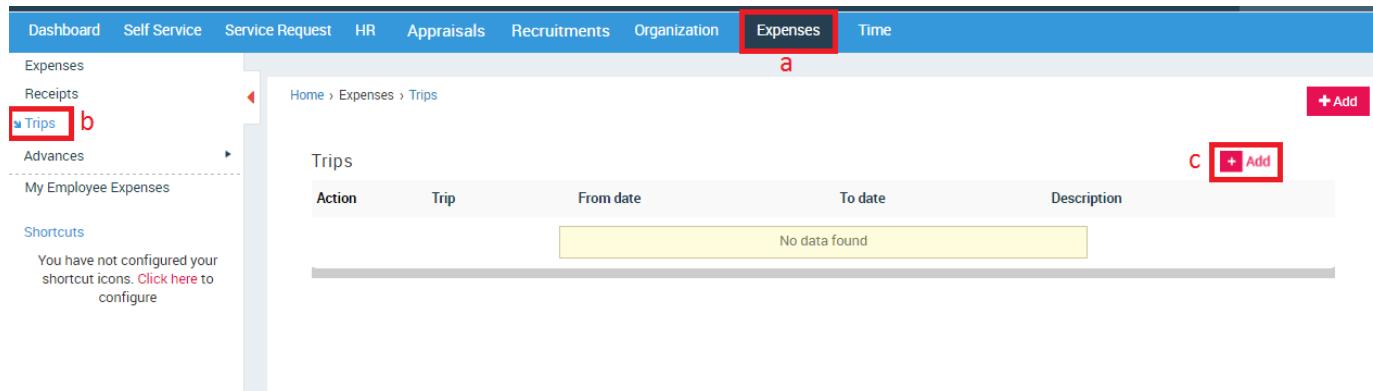
Figure 186

- Click **YES** Button

14.14 How do I create a Trip?

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

Please refer Figure 187

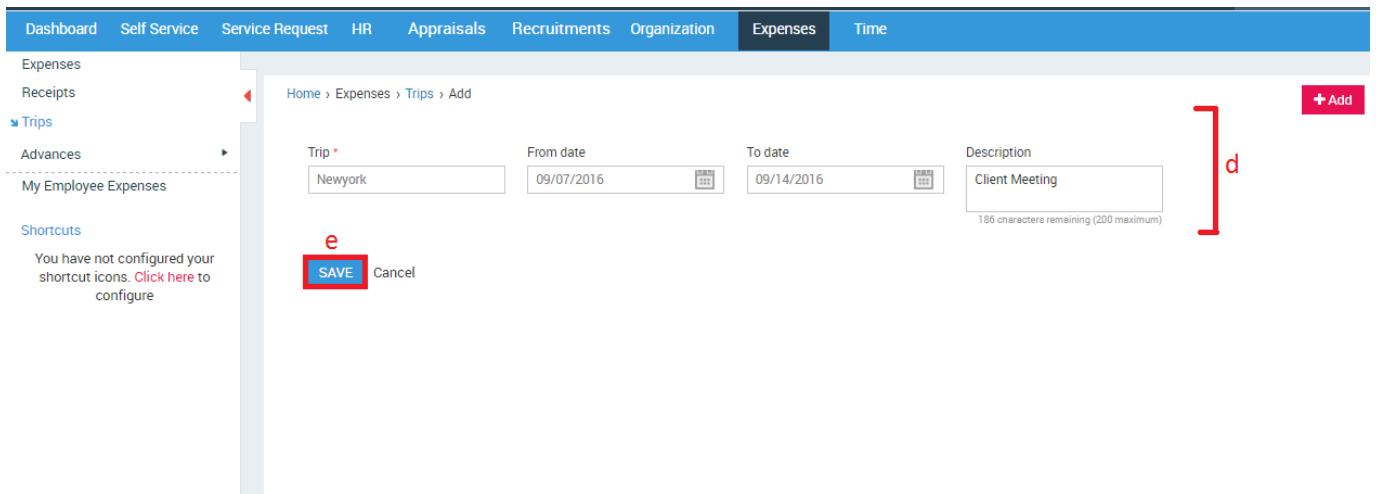


The image shows the "Trips" management screen in the Sentrifugo application. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (highlighted with a red box and labeled 'a'), Time, Expenses (highlighted with a red box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

Figure 187

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

Please refer Figure 188



The screenshot shows the 'Trips' add form in the Sentrifugo Expenses module. The 'Trip' field is populated with 'Newyork'. The 'From date' and 'To date' fields show '09/07/2016' and '09/14/2016' respectively. The 'Description' field contains 'Client Meeting' with a note of '186 characters remaining (200 maximum)'. A red bracket labeled 'd' points to the 'Description' field. A red box labeled 'e' points to the 'SAVE' button.

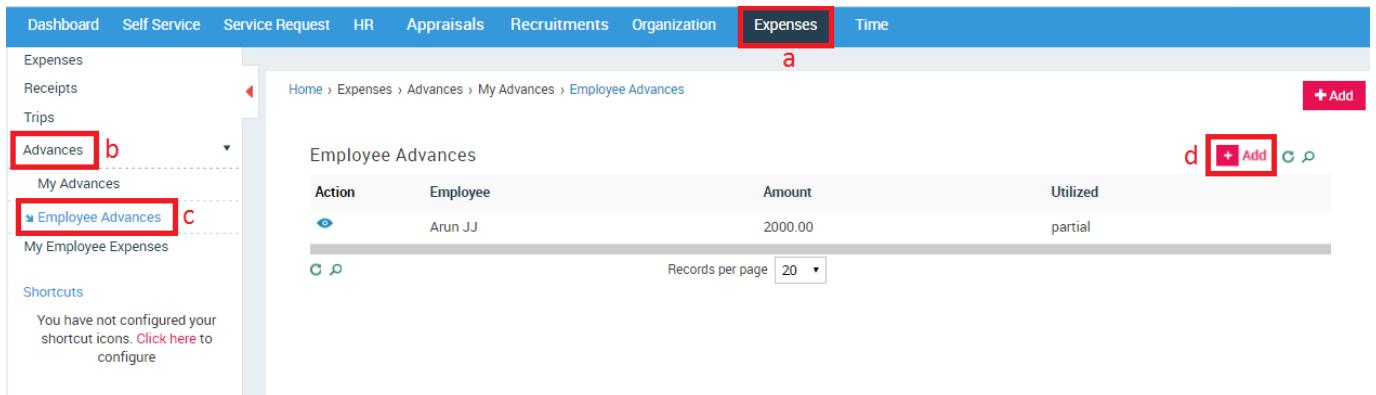
Figure 188

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

14.15 How do I allot an Advance to an Employee?

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

Please refer Figure 189

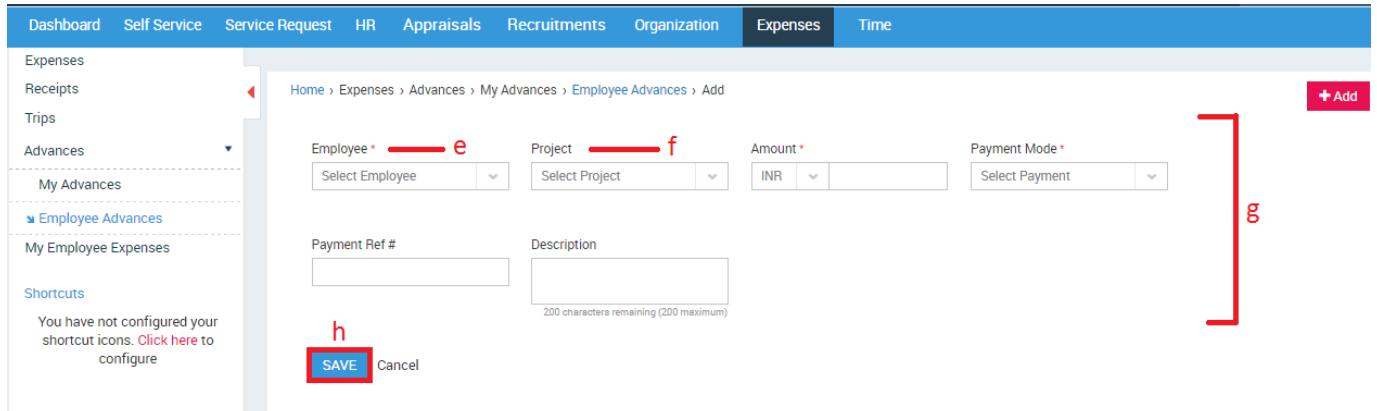


The screenshot shows the 'Employee Advances' list in the Sentrifugo Expenses module. The top navigation bar has 'Expenses' highlighted. The left sidebar shows 'Advances' (labeled 'b') and 'Employee Advances' (labeled 'c') under the 'Advances' category. The main area displays a table with one record: Arun JJ with an amount of 2000.00 and utilization status 'partial'. A red box labeled 'd' points to the '+Add' button.

Figure 189

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

Please refer Figure 190



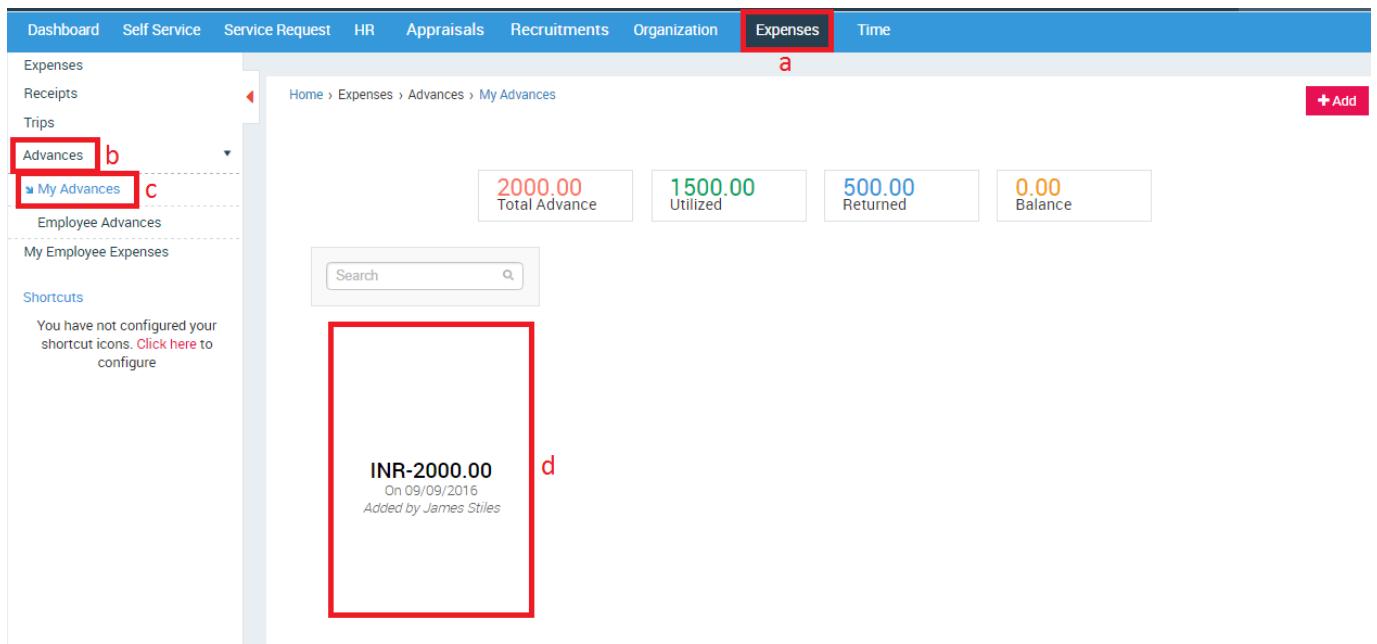
The screenshot shows the 'Employee Advances' add form. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (selected), and Time. On the left sidebar, under the 'Advances' section, 'Employee Advances' is selected. The main form fields are: Employee (dropdown labeled e), Project (dropdown labeled f), Amount (input field labeled g), Payment Mode (dropdown), Payment Ref # (input field), Description (input field), and a Save/Cancel button. A red bracket on the right side groups the amount input field and payment mode dropdown.

Figure 190

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

14.16 How do I view the Advance allotted to me?

Please refer Figure 191



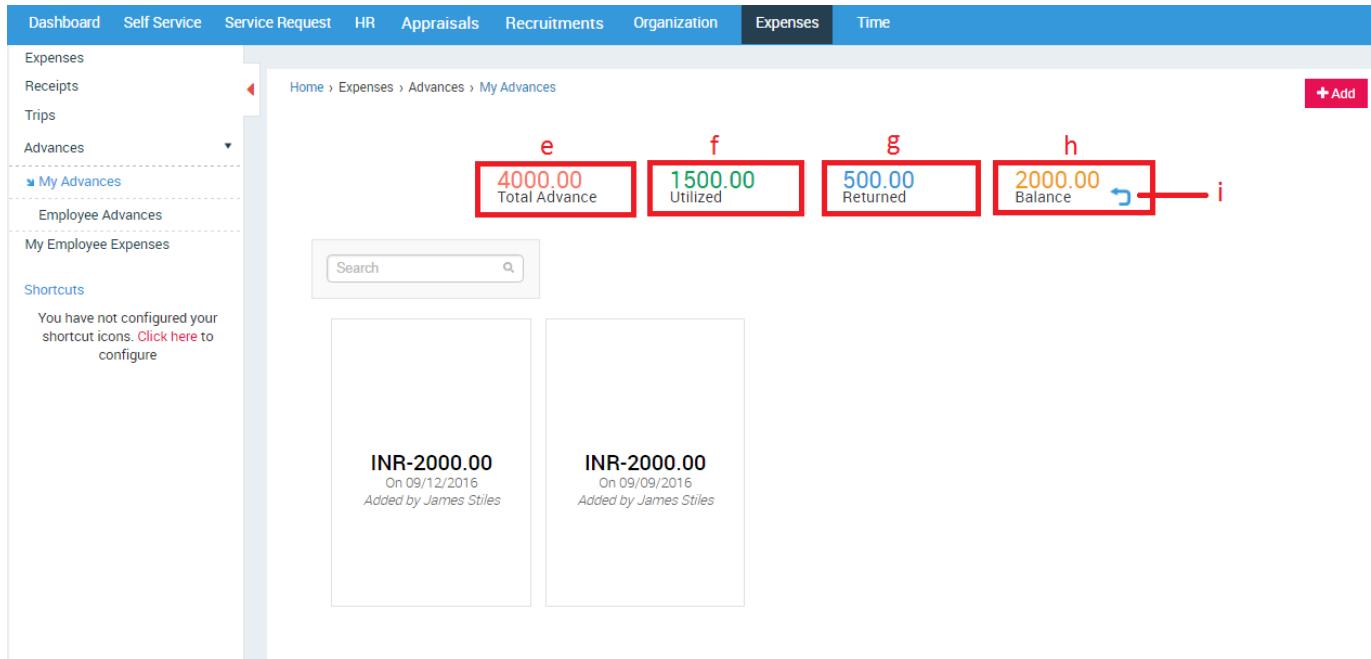
The screenshot shows the 'My Advances' list page. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (selected), and Time. On the left sidebar, 'My Advances' is selected. The main area displays advance details: Total Advance (2000.00), Utilized (1500.00), Returned (500.00), and Balance (0.00). A red box highlights the 'My Advances' link in the sidebar. A red bracket on the right side groups the advance details.

Figure 191

- a. Click **Expenses** in the top menu
- b. Click **Advances** on the left panel

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

Please refer Figure 192



The screenshot shows the Sentrifugo HRMS interface with the following details:

- Top Navigation Bar:** Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (selected), Time.
- Left Sidebar:**
 - Expenses
 - Receipts
 - Trips
 - Advances
 - e** My Advances (selected)
 - Employee Advances
 - My Employee Expenses
 - Shortcuts

You have not configured your shortcut icons. [Click here](#) to configure
- Current Page:** Home > Expenses > Advances > [My Advances](#)
- Content Area:**
 - e** 4000.00 Total Advance
 - f** 1500.00 Utilized
 - g** 500.00 Returned
 - h** 2000.00 Balance

A red box highlights the **Balance** amount (h). A red arrow points from label **i** to the 'Return' link next to the Balance amount.

Below the summary, there is a search bar and two card-like boxes showing advance details:

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

Figure 192

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

A small pop up window will open.

Please refer Figure 193

Return Advance

Amount * Payment Mode * Payment Ref #

INR Select Payment

Return To * Description

Select Employee

200 characters remaining (200 maximum)

SAVE Cancel

j

k

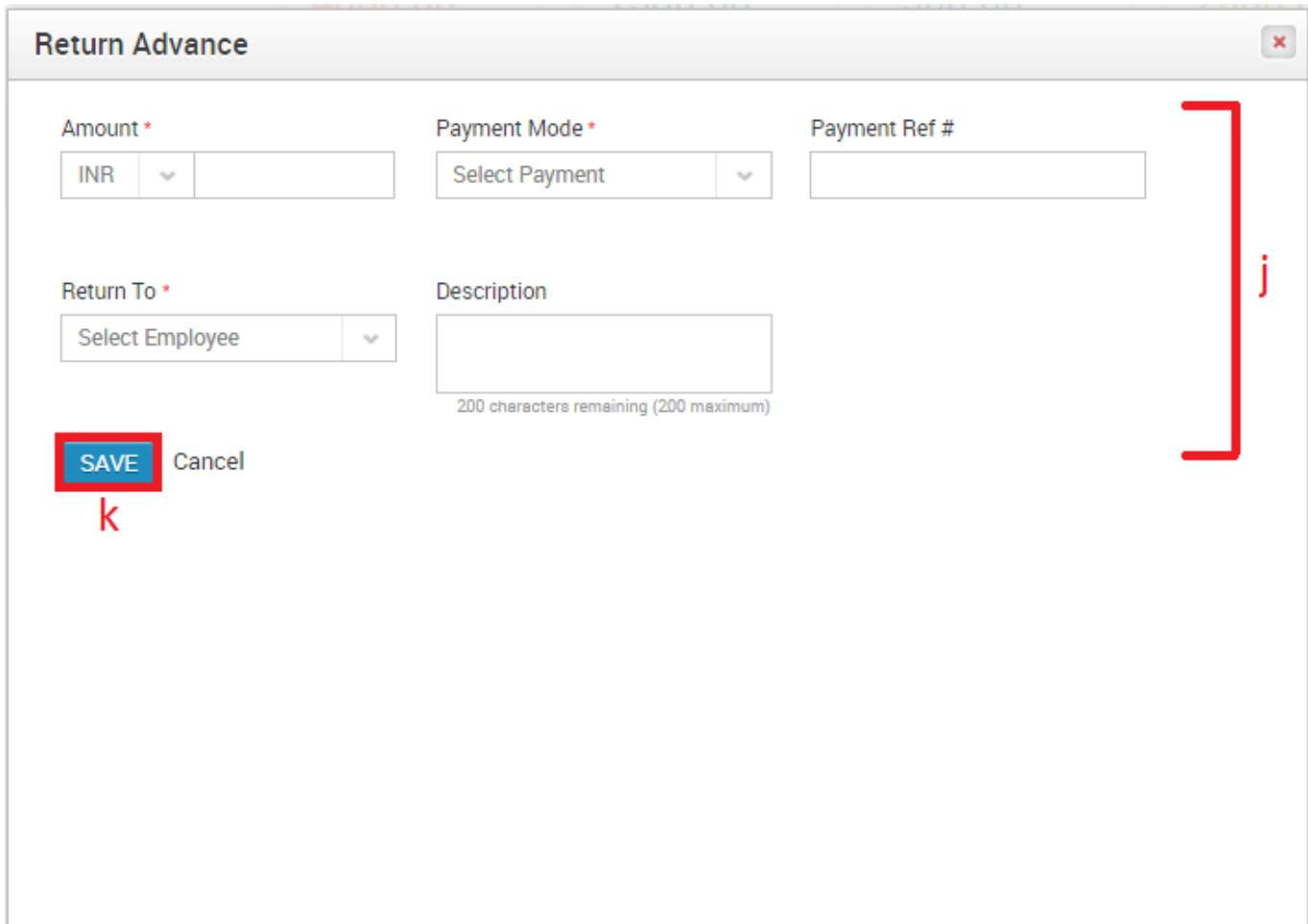
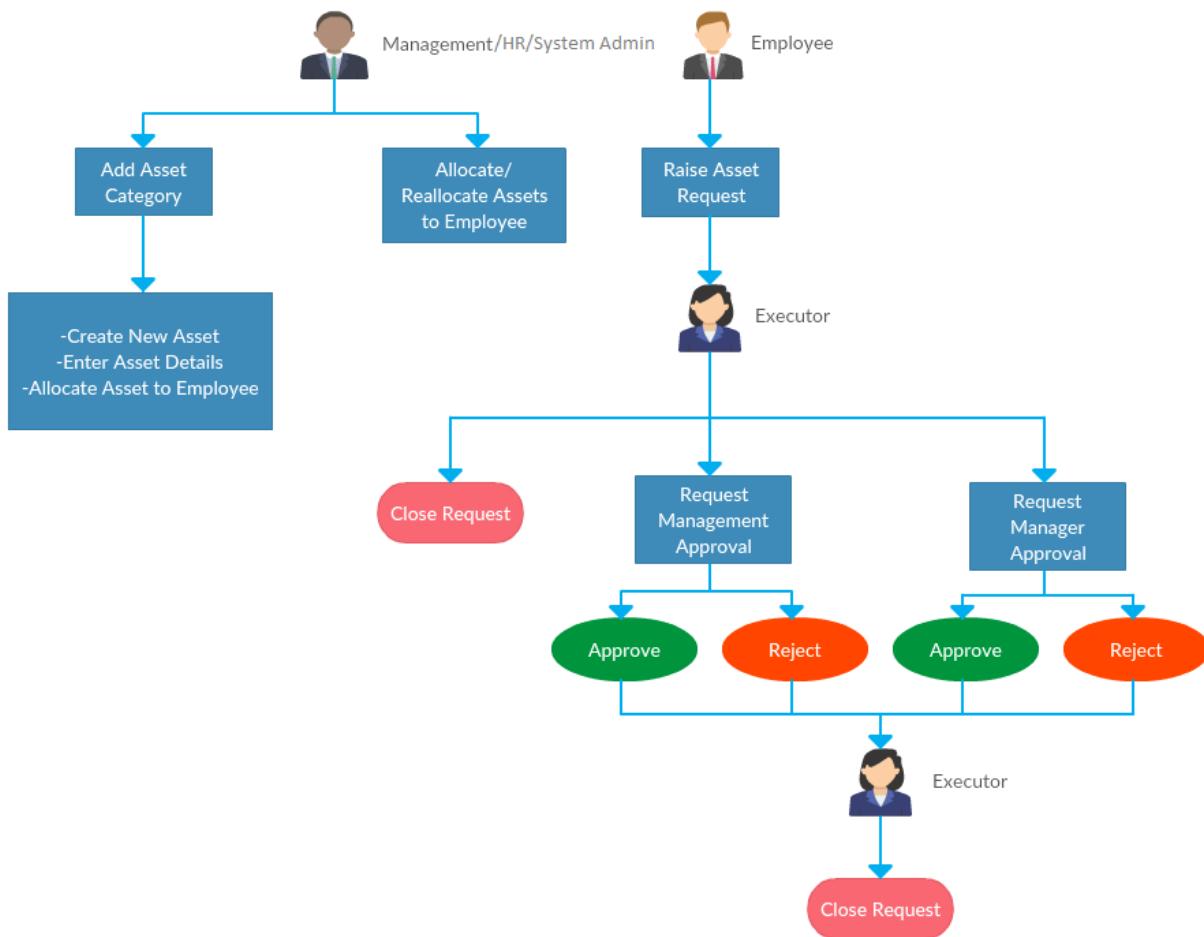


Figure 193

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

15. Assets

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



Process Description:

- User (Management/HR/System Admin) can add a new Asset Category
- User then creates a new asset by providing asset details and allocating that asset to an employee
- User can allocate/reallocating existing assets to employees

- A User (Any User/Employee who has a reporting manager) raises an asset request.
- The Executor(s), Viewer(s) and the User will receive an email notification.
- The Executor has 3 options:
 - He/she can execute and close the service request
 - Request for Management's approval

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

15.1 How do I create an Asset Category?

Please refer Figure 194

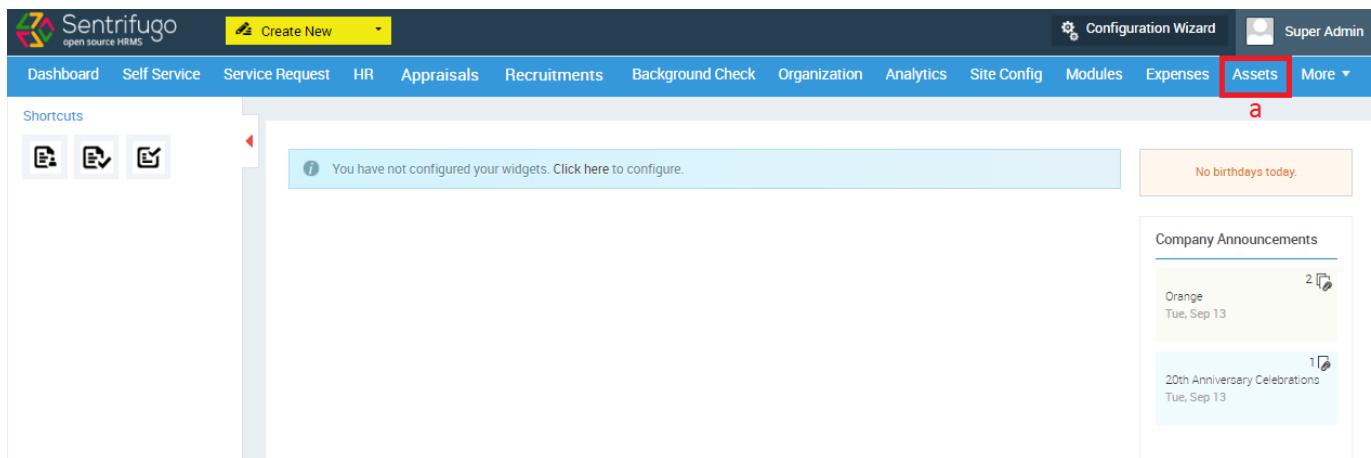


Figure 194

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

Please refer Figure 195

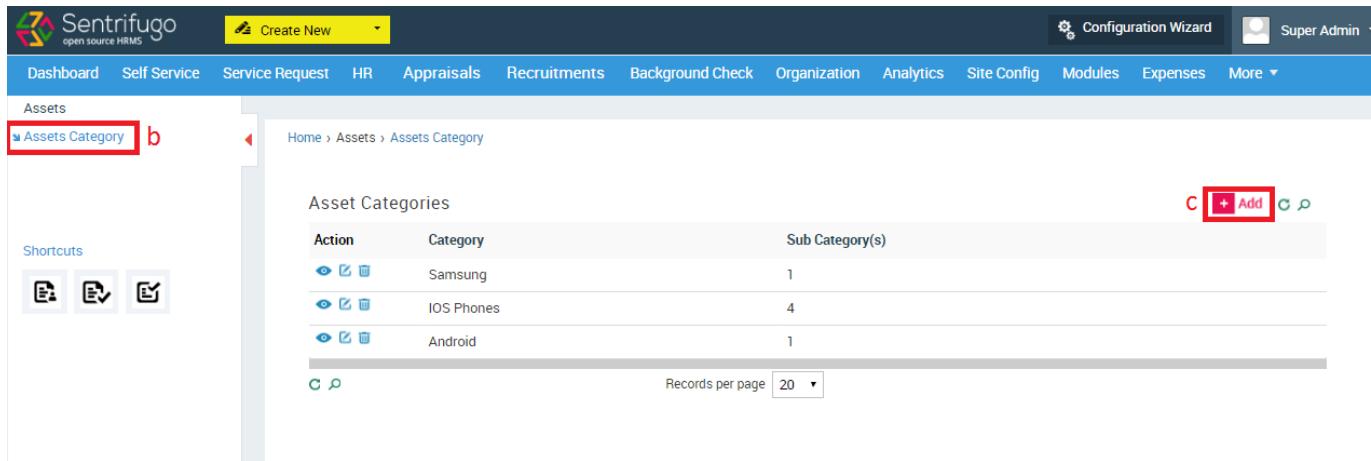


Figure 195

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

Please refer Figure 196

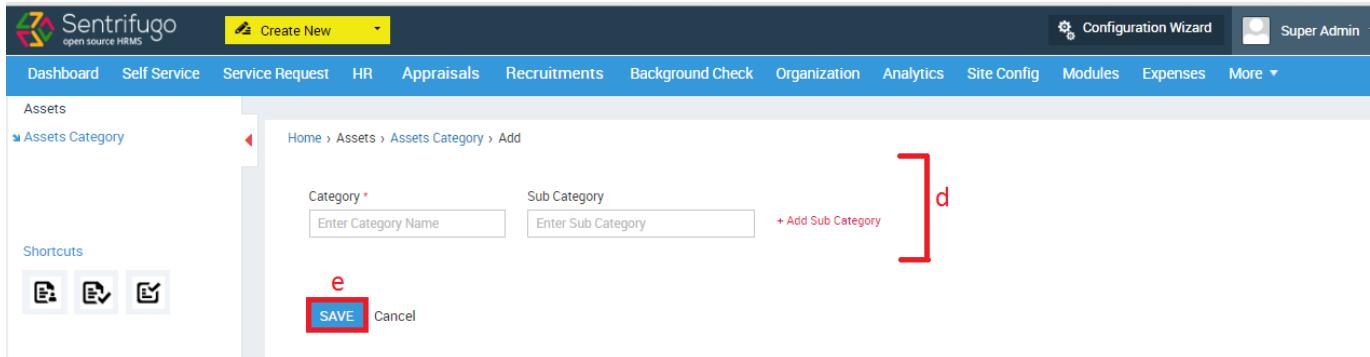


Figure 196

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

15.2 How do I add an Asset?

Please refer Figure 197

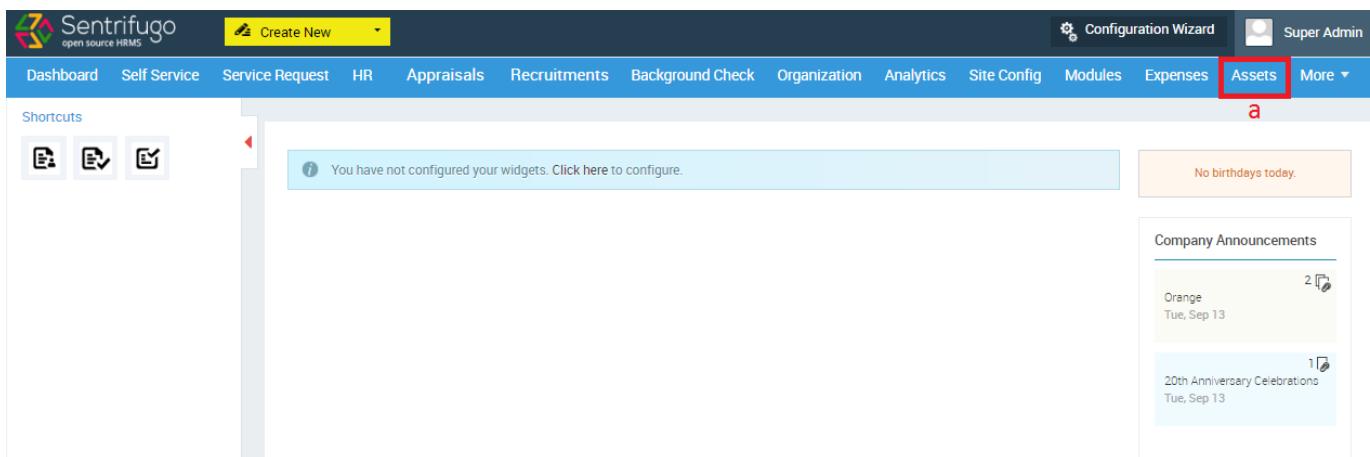
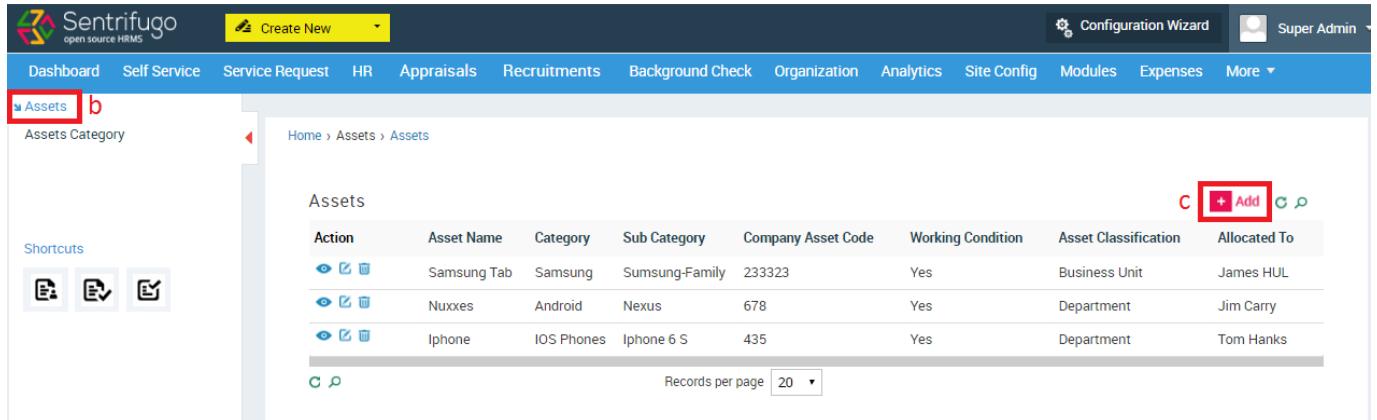


Figure 197

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

Please refer Figure 198

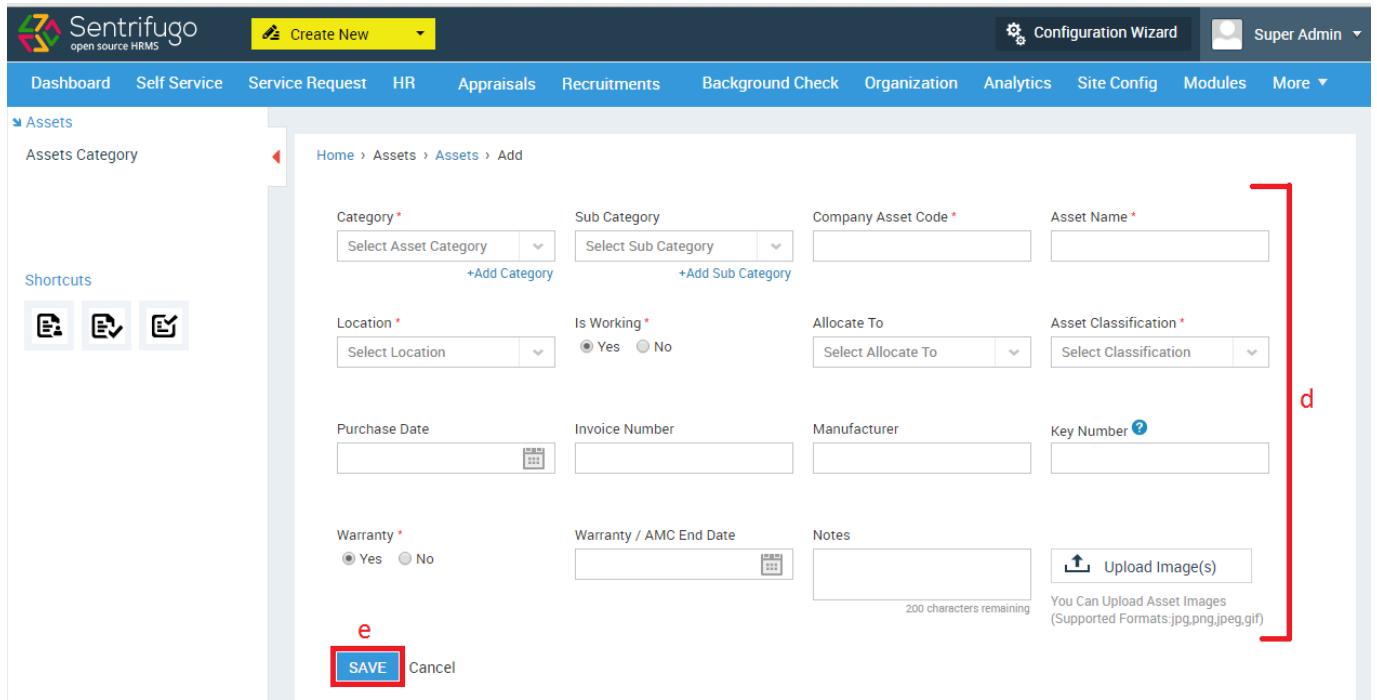


The screenshot shows the 'Assets' list page. The left sidebar has a 'Assets' link with a red box around it and the label 'b'. The top right corner has a '+Add' button with a red box around it and the label 'c'. The main content area displays a table of assets with columns: Action, Asset Name, Category,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

Figure 198

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

Please refer Figure 199



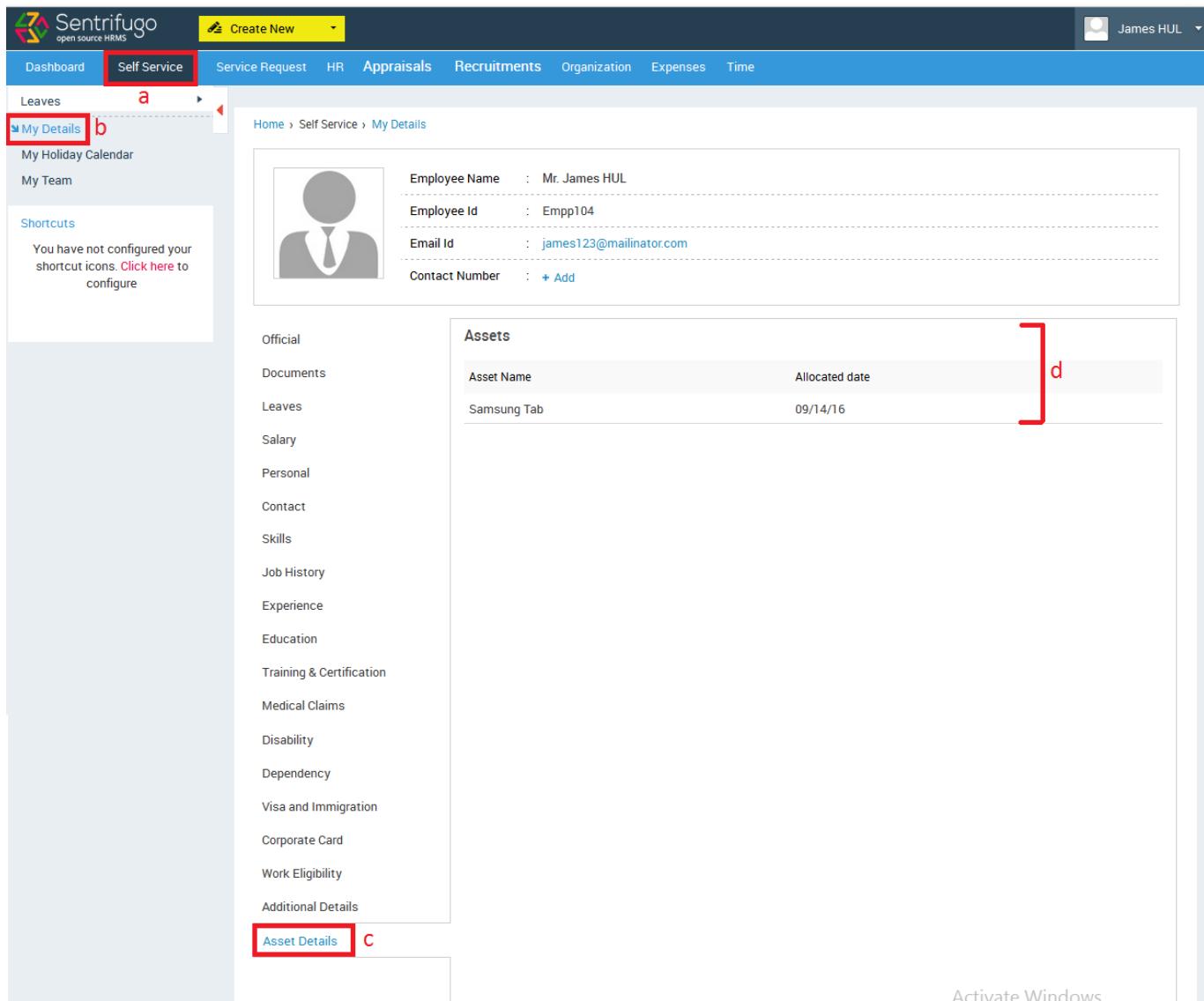
The screenshot shows the 'Assets' add form. The left sidebar has an 'Assets' link with a red box around it and the label 'b'. The top right corner has a '+Add' button with a red box around it and the label 'c'. The main content area has several required fields grouped by a red bracket 'd': Category*, Sub Category, Company Asset Code*, Asset Name*, Location*, Is Working*, Allocate To, Asset Classification*, Purchase Date, Invoice Number, Manufacturer, Key Number, Warranty*, Warranty / AMC End Date, Notes, and Upload Image(s). At the bottom left, there is a 'SAVE' button with a red box around it and the label 'e'.

Figure 199

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

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

Please refer Figure 200



The screenshot shows the Sentrifugo Self Service interface. The top navigation bar includes 'Create New' and a user profile for 'James HUL'. The main menu has tabs for Dashboard, Self Service (highlighted with a red box), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. A left sidebar lists 'Leaves' (with a red box 'a' over it), 'My Details' (highlighted with a red box 'b'), 'My Holiday Calendar', 'My Team', and 'Shortcuts' (which are not configured). The 'Shortcuts' section contains links like Official, Documents, Leaves, Salary, Personal, Contact, Skills, Job History, Experience, Education, Training & Certification, Medical Claims, Disability, Dependency, Visa and Immigration, Corporate Card, Work Eligibility, and Additional Details. Below this is a red box 'c' over the 'Asset Details' link. The main content area shows 'My Details' with fields for Employee Name (Mr. James HUL), Employee Id (Empp104), Email Id (james123@mailinator.com), and Contact Number (+ Add). It also displays an 'Assets' section with a table:

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

A red bracket 'd' points to the 'Allocated date' column.

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

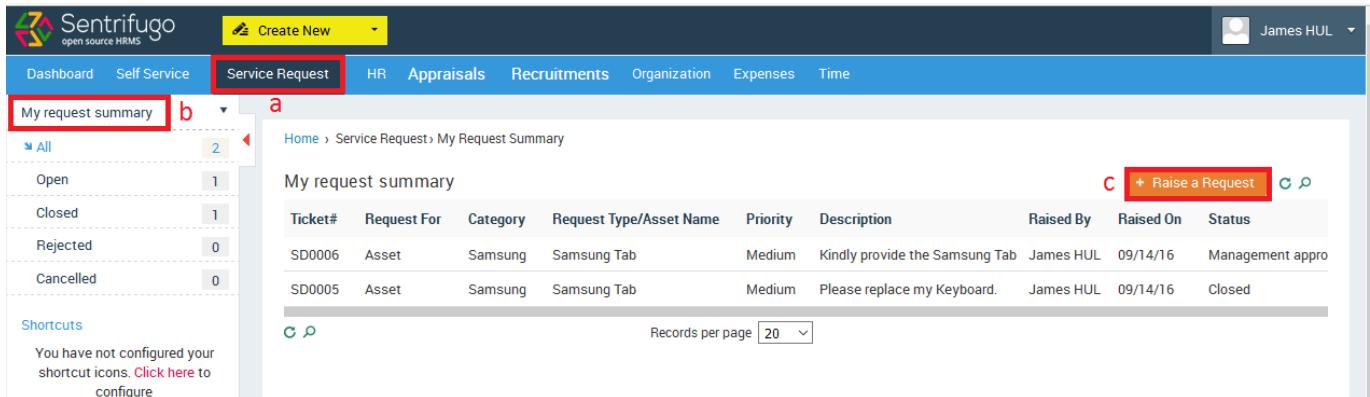


Figure 201

- 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

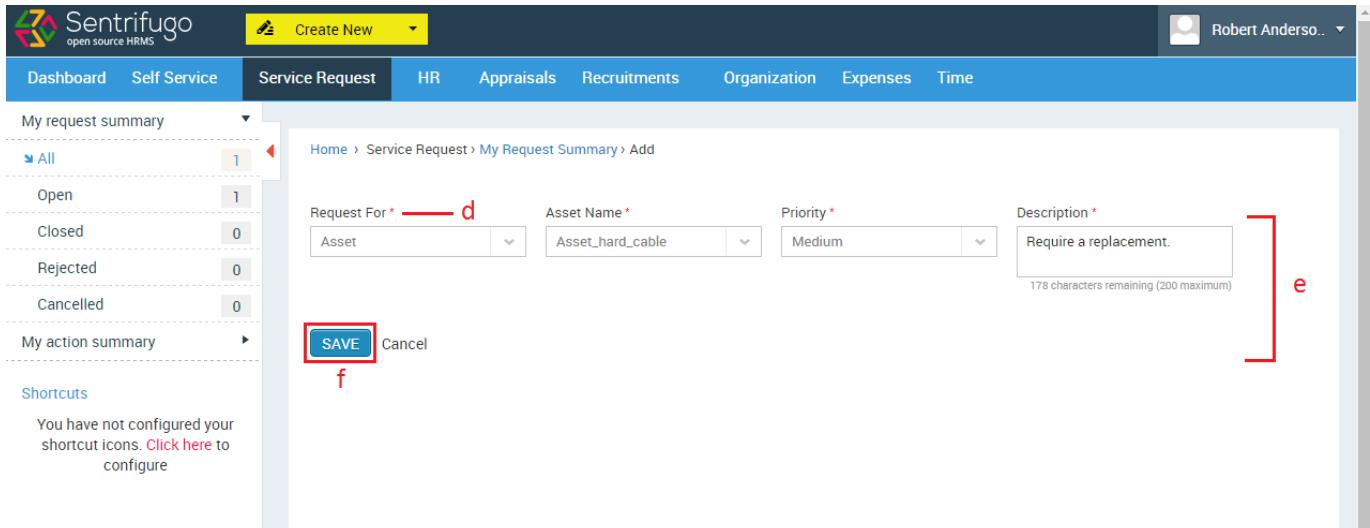


Figure 202

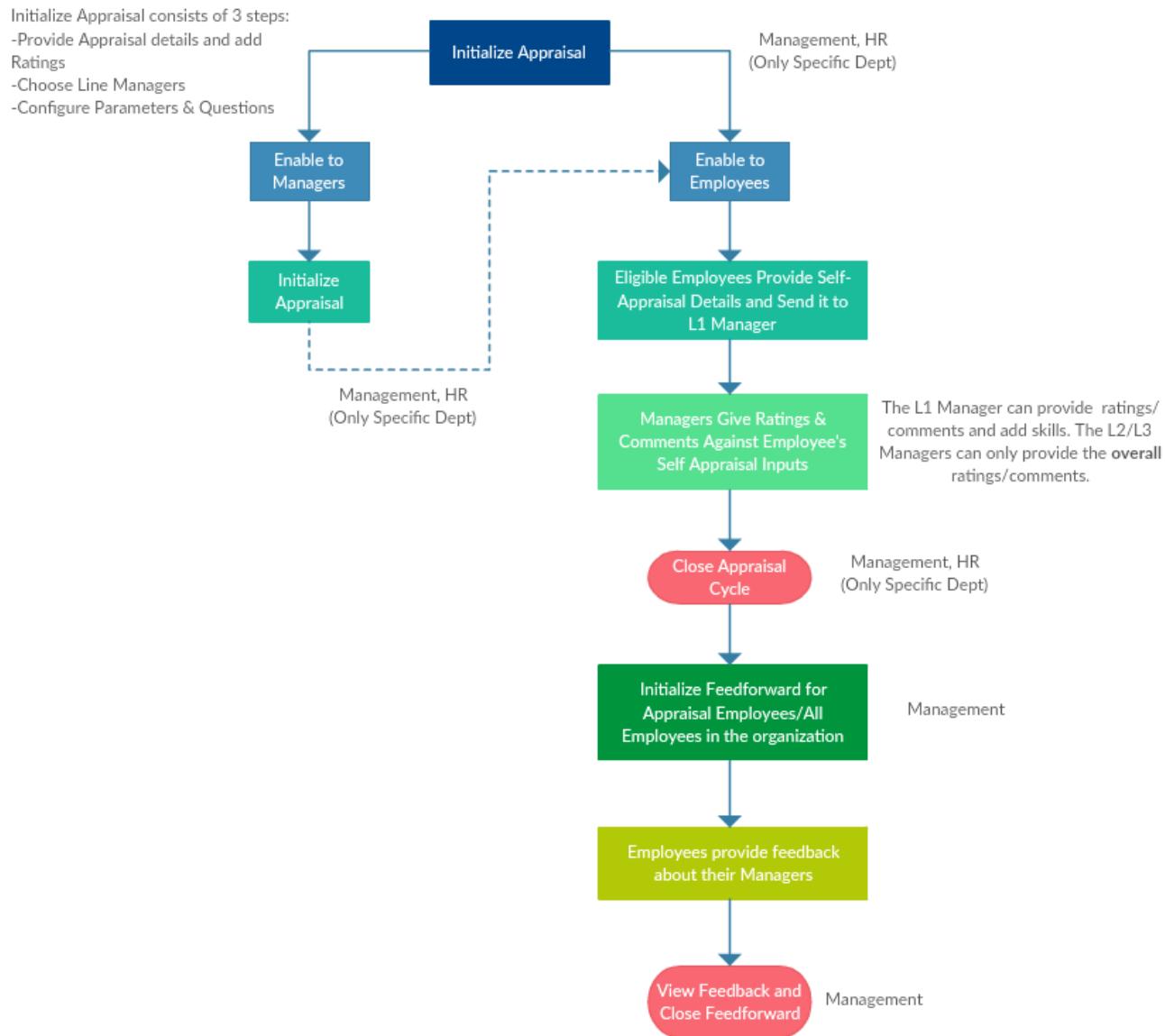
- Select **Asset** in the field 'Request For'
- Fill in the required details
- Click **SAVE** button



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:



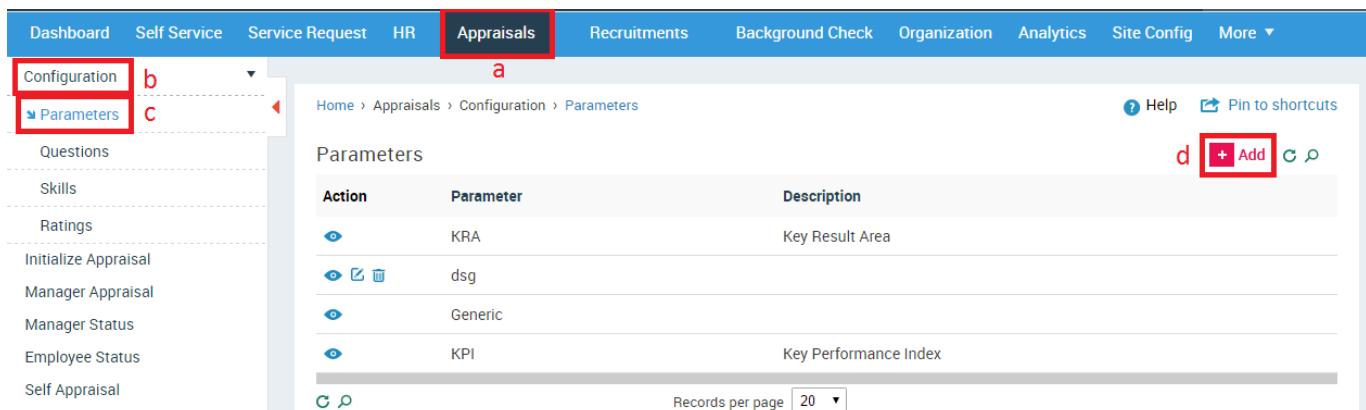
Process Description:

- 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

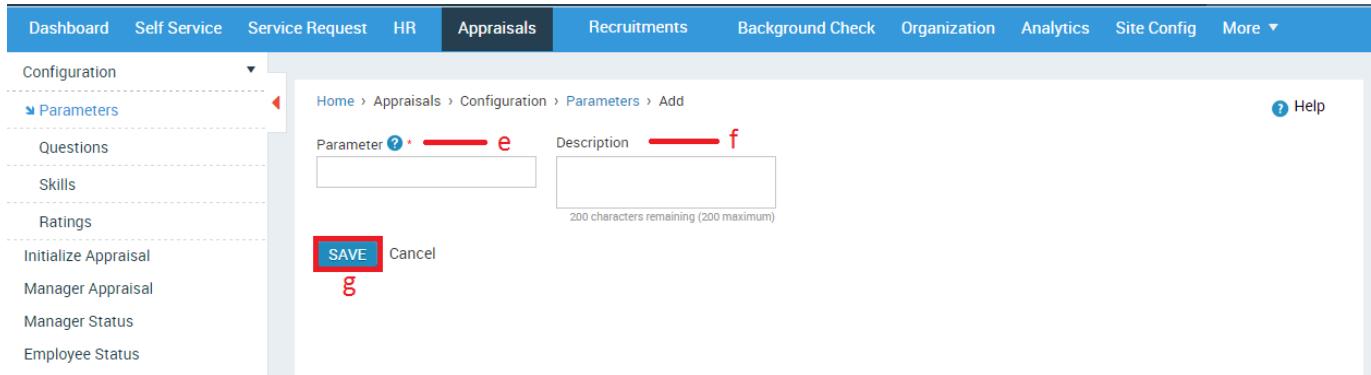


Action	Parameter	Description
Eye icon	KRA	Key Result Area
Eye icon	dsg	
Eye icon	Generic	
Eye icon	KPI	Key Performance Index

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



The screenshot shows the 'Appraisals' section of the Sentrifugo interface. On the left, a sidebar menu includes 'Configuration' (selected), 'Parameters' (highlighted with a red box), 'Questions', 'Skills', 'Ratings', 'Initialize Appraisal', 'Manager Appraisal', 'Manager Status', and 'Employee Status'. The main content area shows a breadcrumb path: Home > Appraisals > Configuration > Parameters > Add. It has fields for 'Parameter' (with a red box) and 'Description' (with a red box). A note says '200 characters remaining (200 maximum)'. Below are 'Cancel' and 'SAVE' buttons, with 'SAVE' highlighted by a red box.

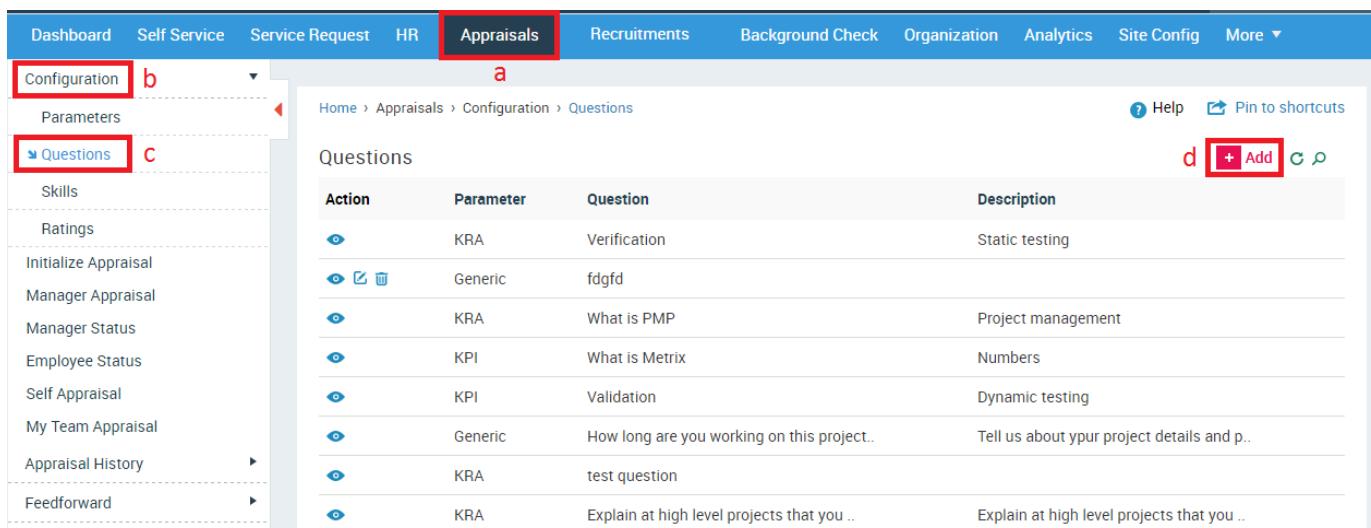
Figure 204

- 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



The screenshot shows the 'Appraisals' section of the Sentrifugo interface. On the left, a sidebar menu includes 'Configuration' (highlighted with a red box), 'Parameters' (highlighted with a red box), 'Questions' (highlighted with a red box), 'Skills', 'Ratings', 'Initialize Appraisal', 'Manager Appraisal', 'Manager Status', 'Employee Status', 'Self Appraisal', 'My Team Appraisal', 'Appraisal History', and 'Feedforward'. The main content area shows a breadcrumb path: Home > Appraisals > Configuration > Questions. It displays a table of questions:

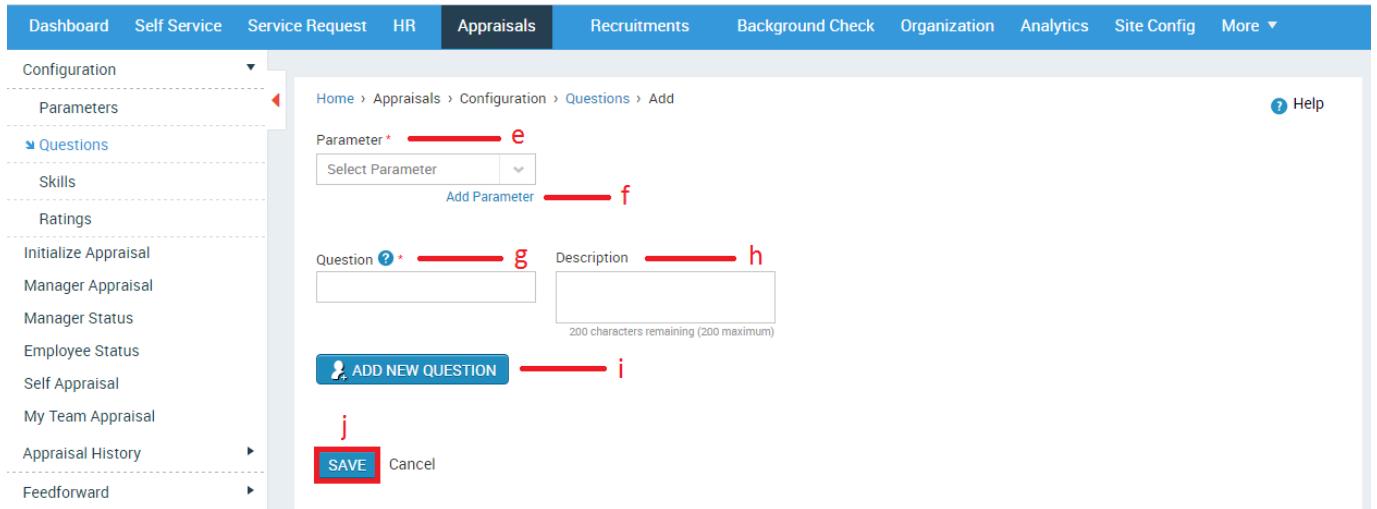
Action	Parameter	Question	Description
	KRA	Verification	Static testing
	Generic	fdgfd	
	KRA	What is PMP	Project management
	KPI	What is Matrix	Numbers
	KPI	Validation	Dynamic testing
	Generic	How long are you working on this project..	Tell us about your project details and p..
	KRA	test question	
	KRA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

The 'Questions' link in the sidebar and the '+Add' button in the header are highlighted with red boxes.

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 Appraisals configuration interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (selected), Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar titled 'Configuration' lists various sections: Parameters, Questions (selected), 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 question. It has fields for 'Parameter' (dropdown menu labeled 'e'), 'Question' (input field labeled 'g'), 'Description' (input field labeled 'h'), and a 'Description' note indicating 200 characters remaining (200 maximum). Below these are buttons for 'ADD NEW QUESTION' (labeled 'i') and 'SAVE' (labeled 'j'). A 'Cancel' button is also present.

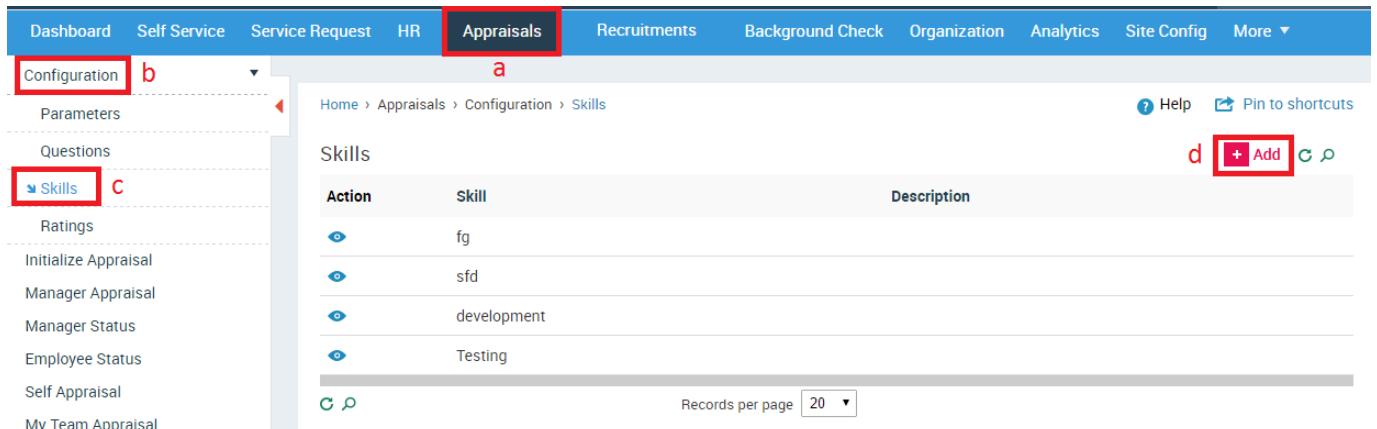
Figure 206

- 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



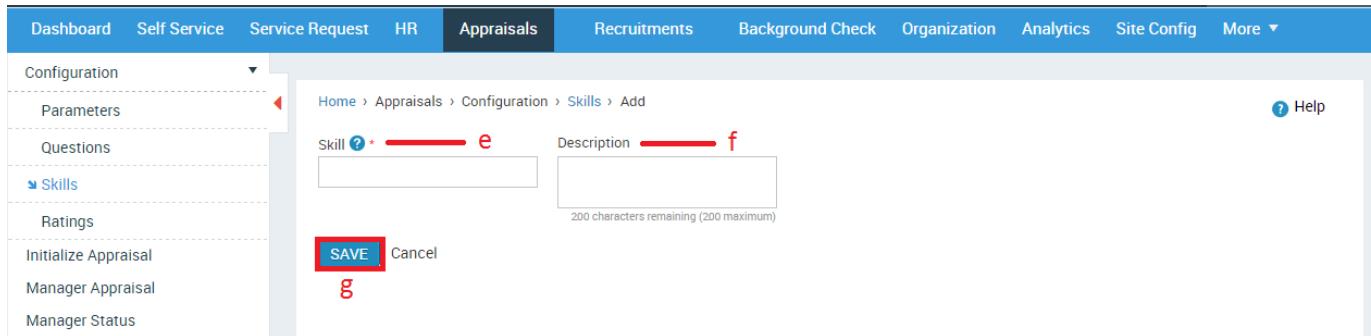
The screenshot shows the Sentrifugo Appraisals configuration interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (selected), Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar titled 'Configuration' lists various sections: Parameters, Questions (selected), Skills (highlighted with a red box, labeled 'c'), Ratings, Initialize Appraisal, Manager Appraisal, Manager Status, Employee Status, Self Appraisal, and My Team Appraisal. The main content area displays a table for managing skills. The table has columns for 'Action', 'Skill', and 'Description'. It contains four rows: 'fg', 'sfd', 'development', and 'Testing'. At the bottom right of the table are buttons for '+ Add' (labeled 'd') and a refresh icon. A search bar and a 'Records per page' dropdown are also present at the bottom.

Figure 207

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

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

Please refer Figure 208



The screenshot shows the 'Appraisals' section of the Sentrifugo interface. On the left, a sidebar lists 'Configuration' (selected), 'Parameters', 'Questions', 'Skills' (highlighted with a red box), 'Ratings', 'Initialize Appraisal', 'Manager Appraisal', and 'Manager Status'. The main area shows a breadcrumb path: Home > Appraisals > Configuration > Skills > Add. It has fields for 'Skill' (labeled e) and 'Description' (labeled f). A 'SAVE' button (labeled g) is highlighted with a red box. A note at the bottom says '200 characters remaining (200 maximum)'.

Figure 208

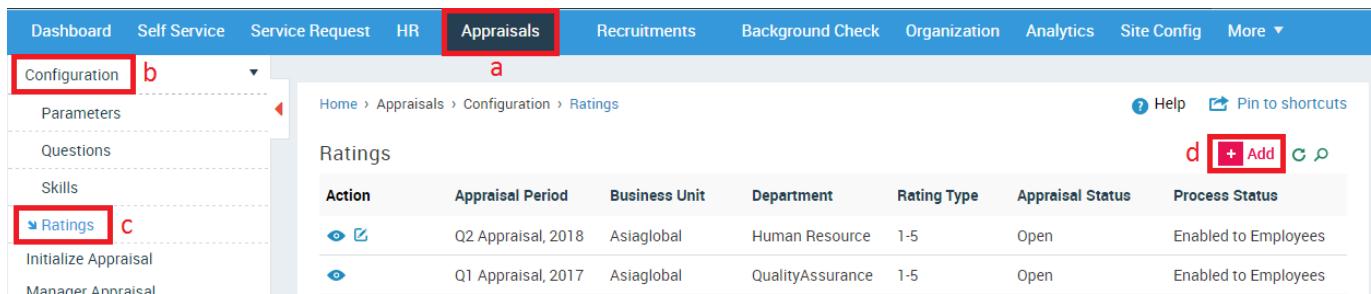
- e. Enter the skill
- f. Provide description if necessary
- g. Click **SAVE** button

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

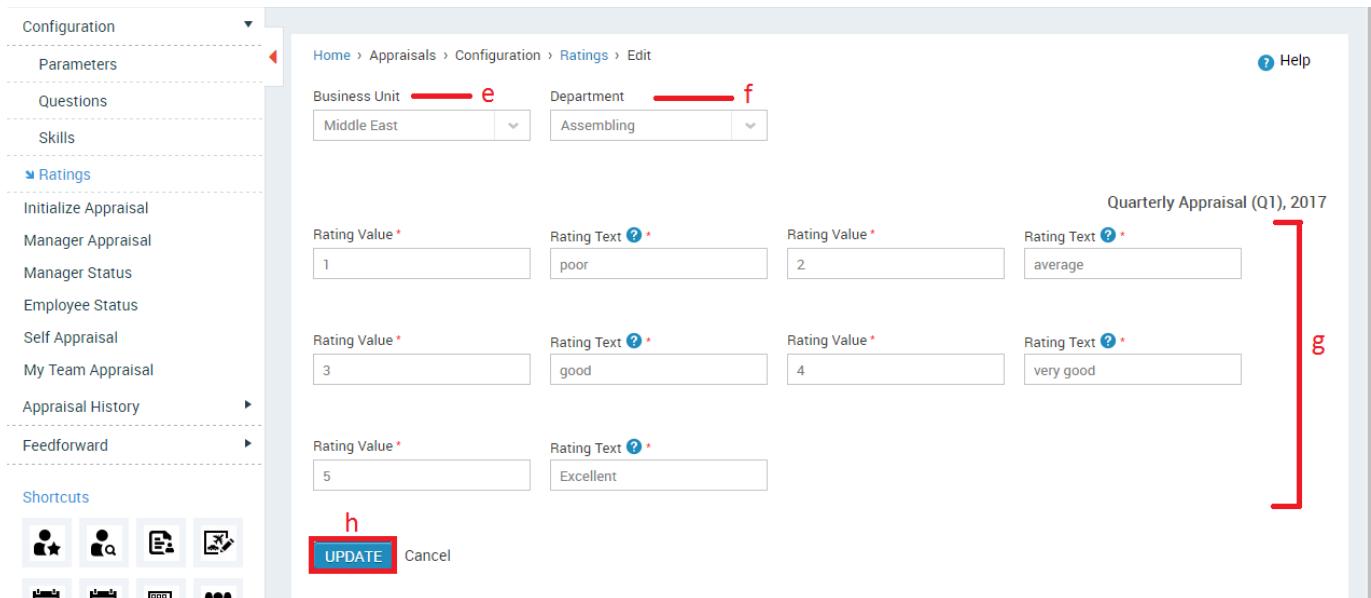


The screenshot shows the 'Appraisals' section of the Sentrifugo interface. On the left, a sidebar lists 'Configuration' (highlighted with a red box), 'Parameters', 'Questions', 'Skills', 'Ratings' (highlighted with a red box), 'Initialize Appraisal', and 'Manager Appraisal'. The main area shows a breadcrumb path: Home > Appraisals > Configuration > Ratings. It 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 Asiaglobal in Human Resource with a rating type of 1-5, and 'Q1 Appraisal, 2017' for Asiaglobal in Quality Assurance with a rating type of 1-5. A 'Pin to shortcuts' button and an 'Edit' icon (highlighted with a red box) are visible on the right.

Figure 209

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

Please refer Figure 210



Configuration

Parameters

Questions

Skills

Ratings

Initialize Appraisal

Manager Appraisal

Manager Status

Employee Status

Self Appraisal

My Team Appraisal

Appraisal History

Feedforward

Shortcuts

Business Unit **e** Department **f**

Middle East Assembling

Rating Value * Rating Text ? * Rating Value * Rating Text ? *

1 poor 2 average

Rating Value * Rating Text ? * Rating Value * Rating Text ? *

3 good 4 very good

Rating Value * Rating Text ? *

5 Excellent

Quarterly Appraisal (Q1), 2017

UPDATE Cancel

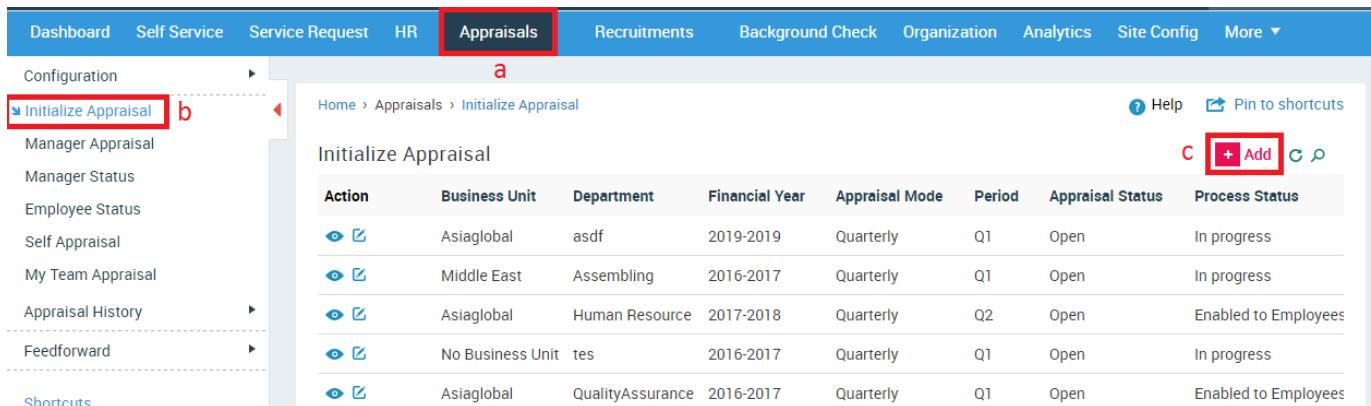
Figure 210

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

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

16.5 How do I Initialize an Appraisal process?

Please refer Figure 211



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

Configuration

Initialize Appraisal **b**

Manager Appraisal

Manager Status

Employee Status

Self Appraisal

My Team Appraisal

Appraisal History

Feedforward

Shortcuts

a

Home > Appraisals > Initialize Appraisal

Initialize Appraisal

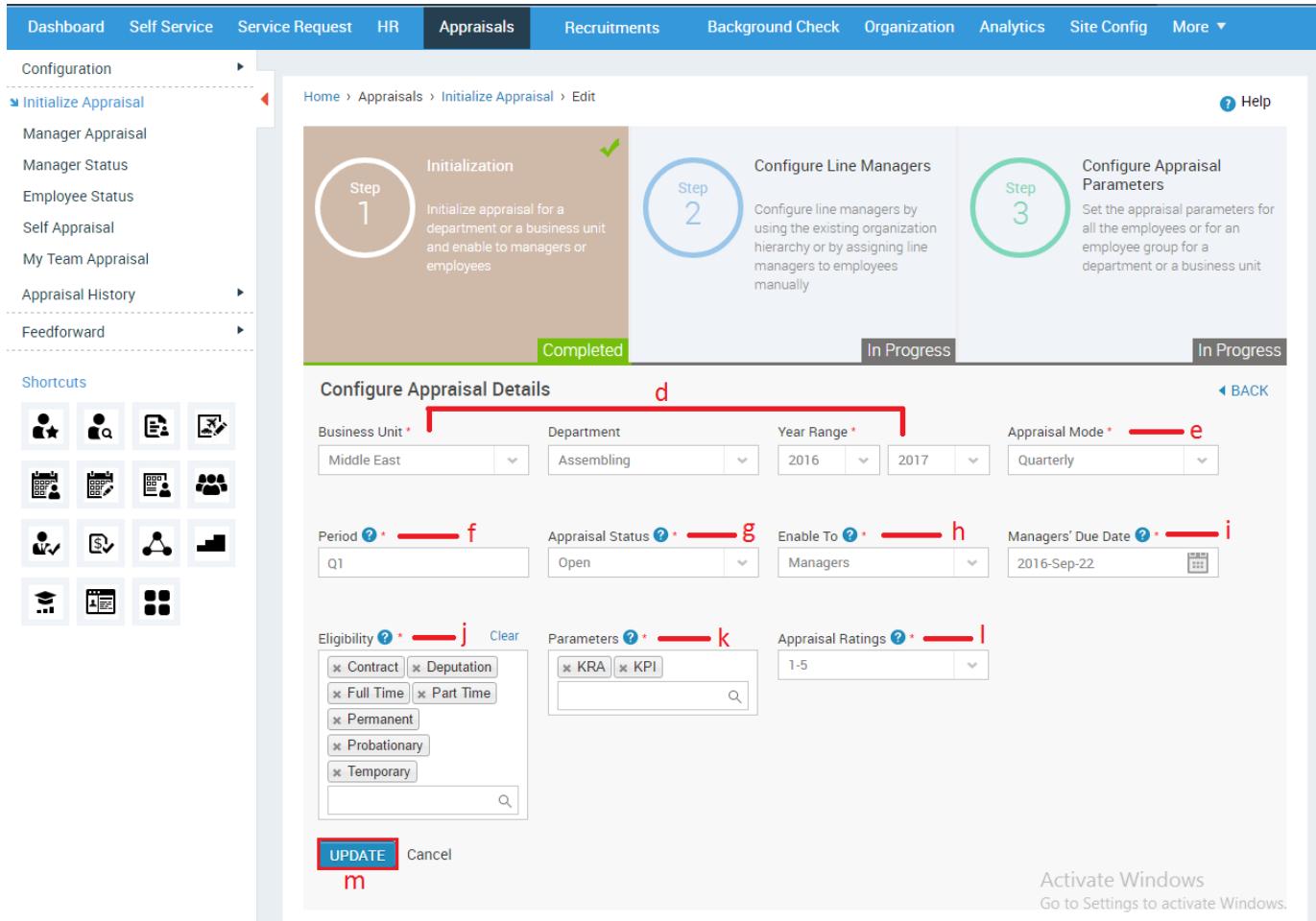
Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
	Asiaglobal	asdf	2019-2019	Quarterly	Q1	Open	In progress
	Middle East	Assembling	2016-2017	Quarterly	Q1	Open	In progress
	Asiaglobal	Human Resource	2017-2018	Quarterly	Q2	Open	Enabled to Employees
	No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

c + Add

Figure 211

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

Please refer Figure 212



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

Figure 212

Step 1: Initialization

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

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

Please refer Figure 213

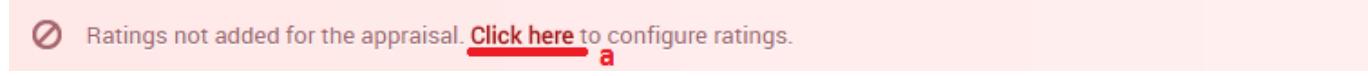


Figure 213

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

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

Step 2: Configure Line Managers

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

The Line Managers can be configured in two ways:

1. Choose by Organization Hierarchy

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

Please refer Figure 214

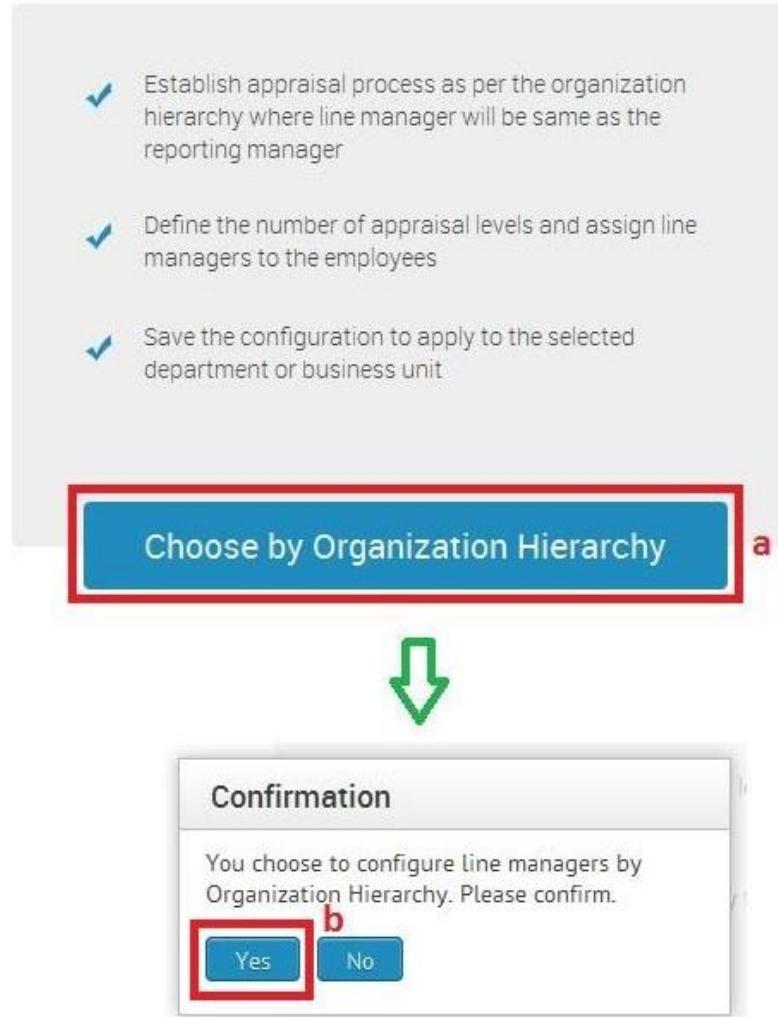


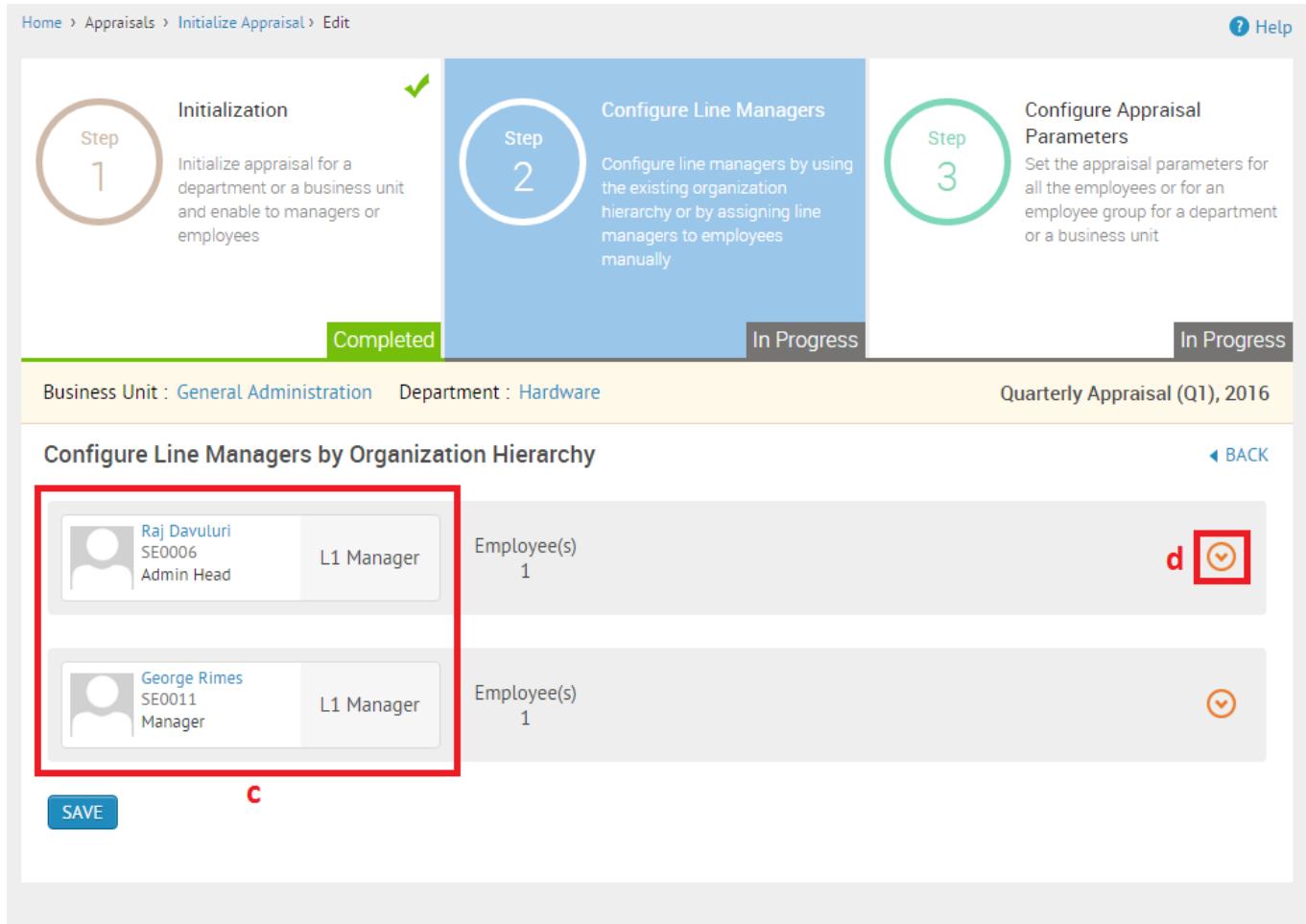
Figure 214

- Click **Choose by Organization Hierarchy** button

A small confirmation window will appear.

- Click **Yes** button

Please refer Figure 215



Home > Appraisals > Initialize Appraisal > Edit

Help

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

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

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

Completed In Progress In Progress

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

Configure Line Managers by Organization Hierarchy ▲ BACK

Employee(s)	
1	
1	

Raj Davuluri
SE0006
Admin Head L1 Manager

George Rimes
SE0011
Manager L1 Manager

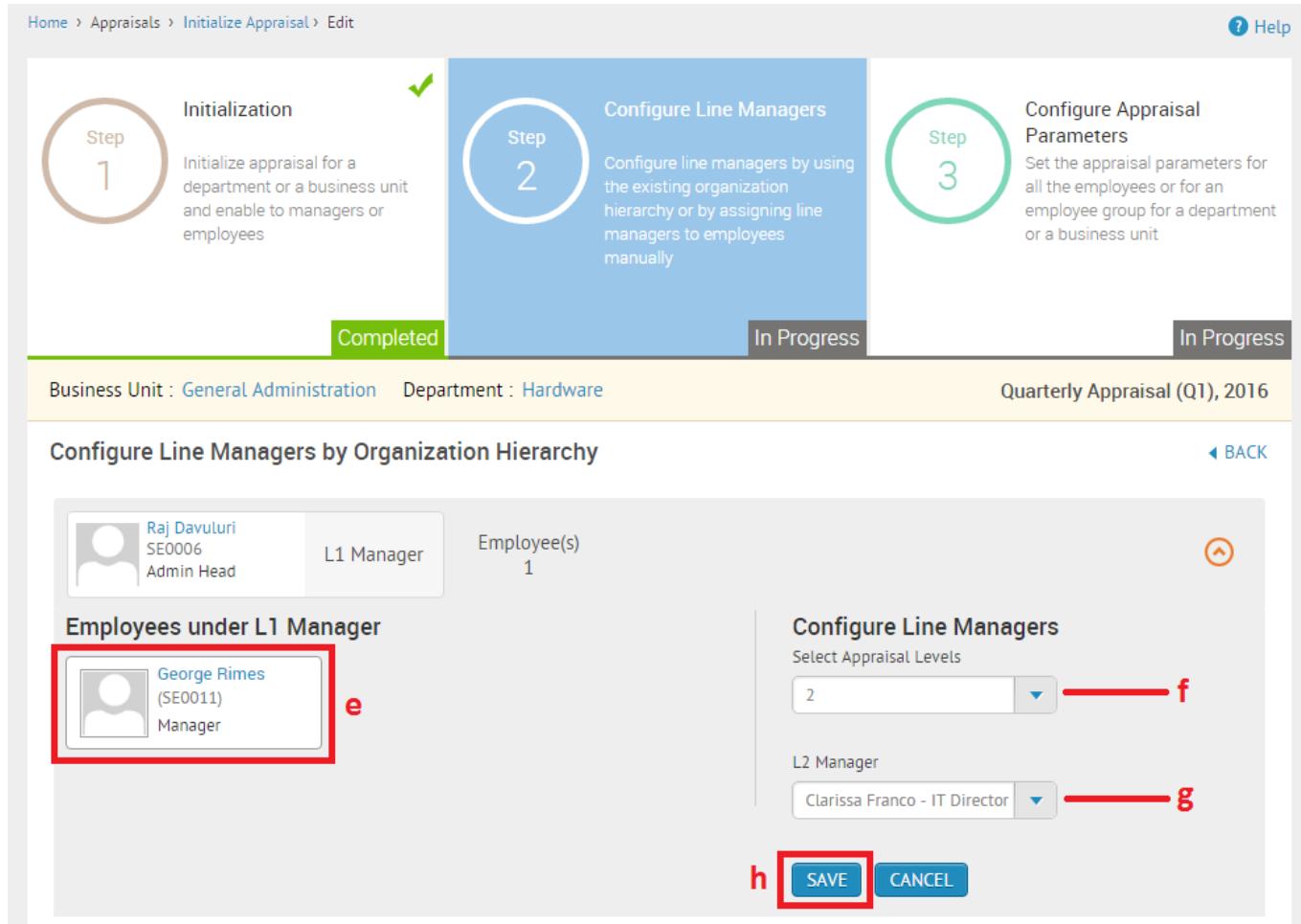
Employee(s) 1 Employee(s) 1

SAVE C 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



The screenshot shows the 'Initialize Appraisal' process with three steps:

- Step 1 Initialization**: Completed.
- Step 2 Configure Line Managers**: In Progress.
- Step 3 Configure Appraisal Parameters**: In Progress.

Below the steps, the details are:

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

The current step, 'Configure Line Managers by Organization Hierarchy', displays the L1 Manager 'Raj Davuluri' (SE0006, Admin Head) managing 1 employee, George Rimes (SE0011, Manager). A red box labeled 'e' highlights George Rimes. To the right, configuration options for appraisal levels (2 selected), L2 Manager (Clarissa Franco - IT Director), and buttons for SAVE (red box) and CANCEL are shown.

Figure 216

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



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

2. Assign Line Managers to Employees

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

Please refer Figure 217

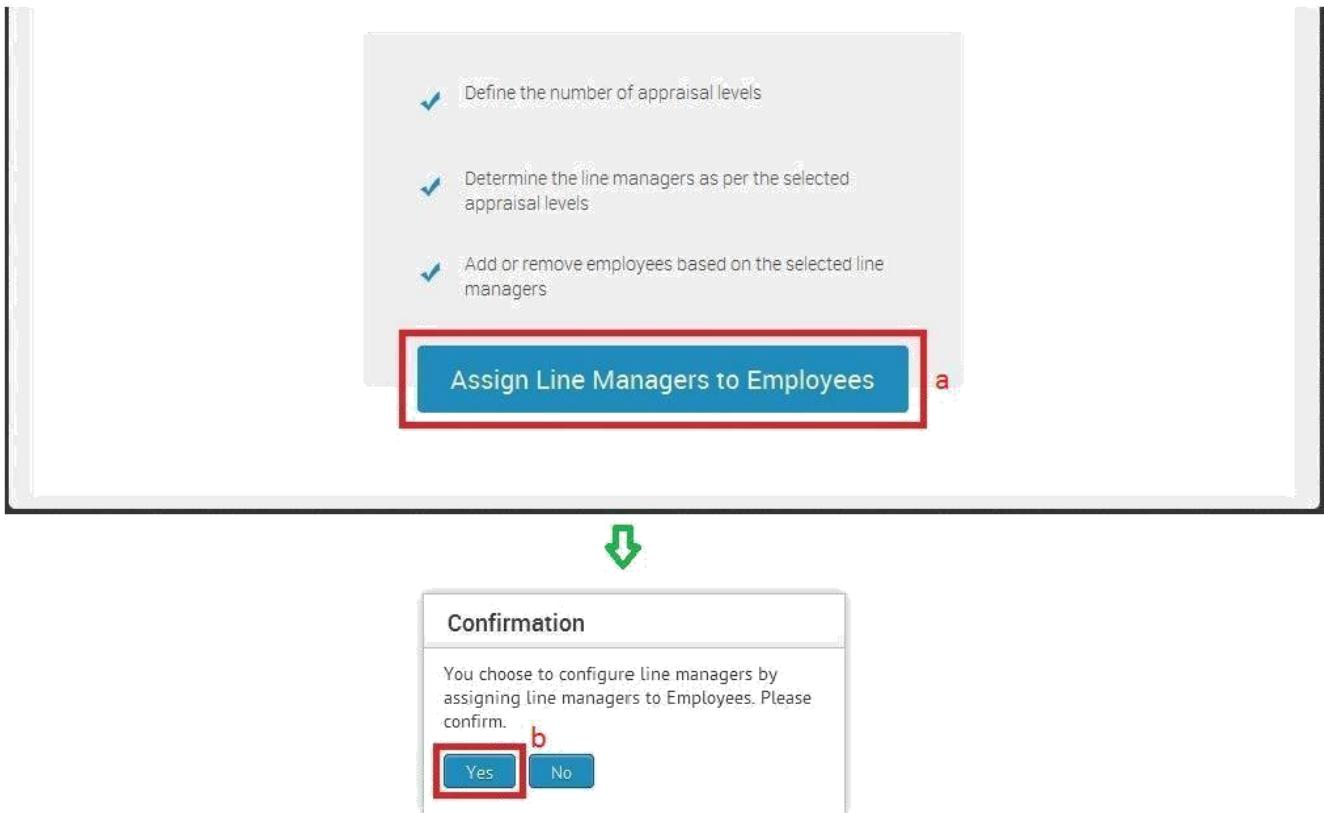


Figure 217

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

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 218

Home > Appraisals > Initialize Appraisal > Edit

Help

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

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

Configure Line Managers [BACK](#)

+Add Line Managers **c**

Select Appraisal Levels **d**
2

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

Employees (Click on an employee to add to group)
Search Employee **f**
saikiran (EMP0011)

Employees (Click on an employee to remove)
Search Employee **g**
taeter tester (EMP0010)

h SAVE Cancel

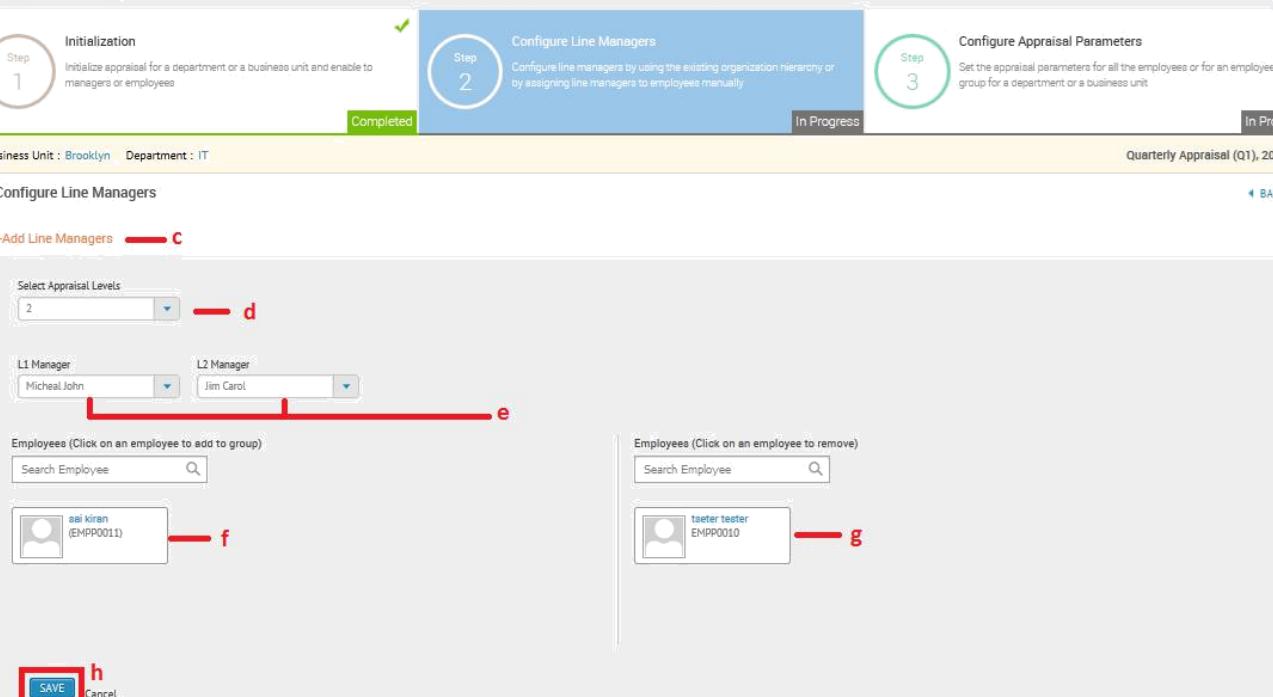


Figure 218

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

Step 3: Configure Appraisal Parameters

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

1. All Employees

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

Please refer Figure 219

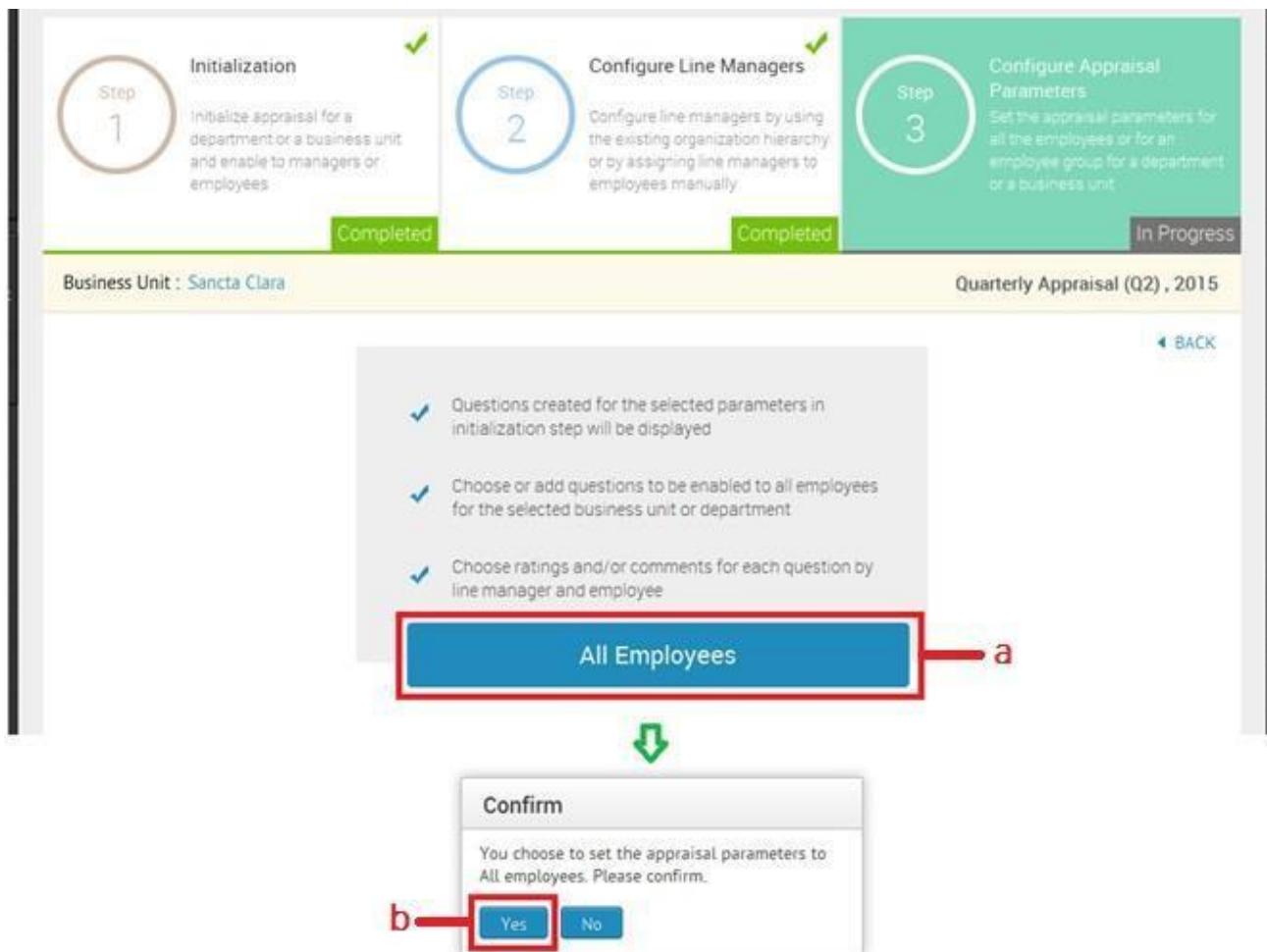


Figure 219

a. Click **All Employees**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 220

Home > Appraisals > Initialize Appraisal > Edit Help

Step 1 Initialization ✓ Completed

Step 2 Configure Line Managers ✓ Completed

Step 3 Configure Appraisal Parameters ✓ In Progress

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

Configure Questions For All Employees ◀ BACK

All | Selected g + Add New Question

Questions		
<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

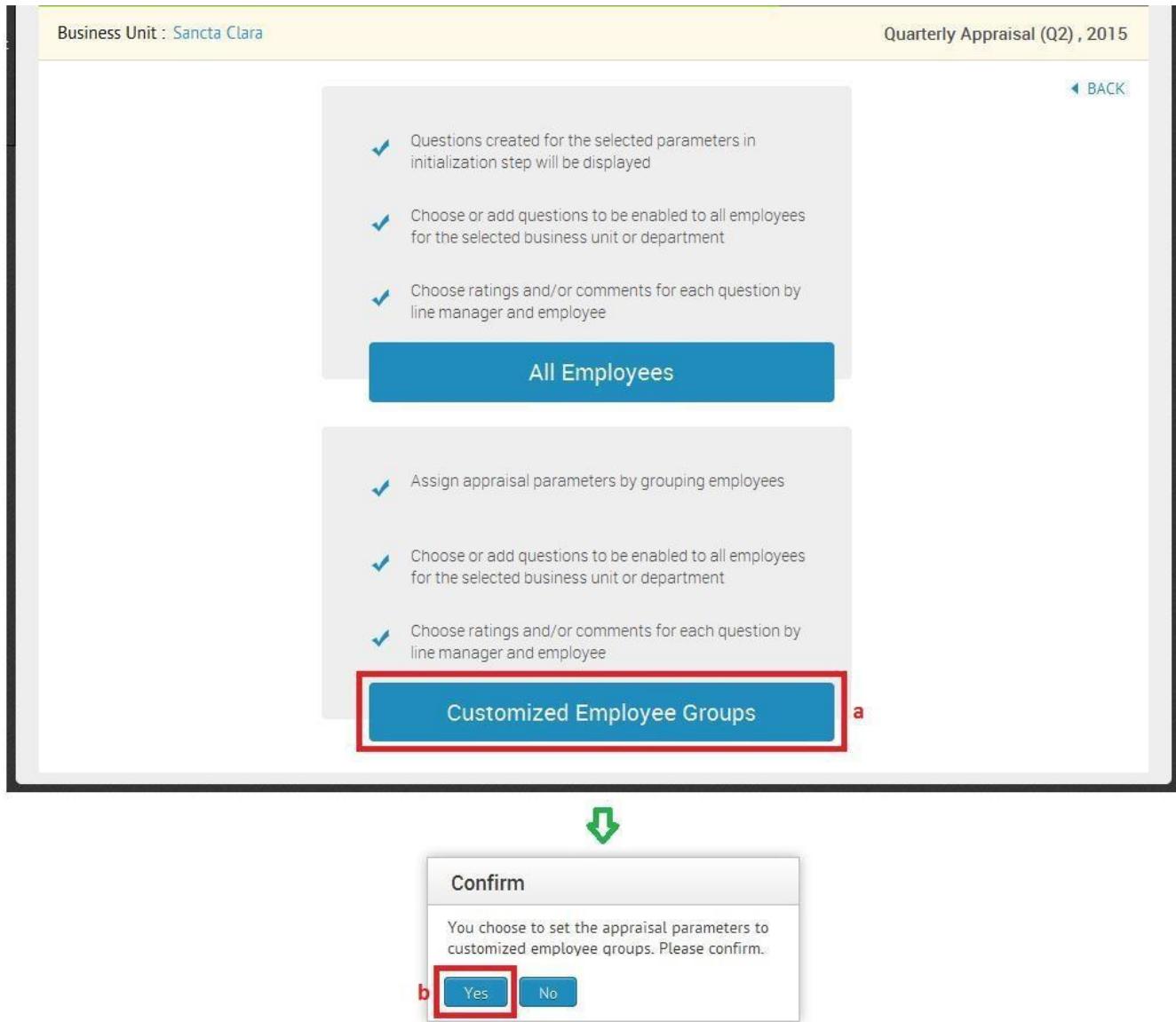


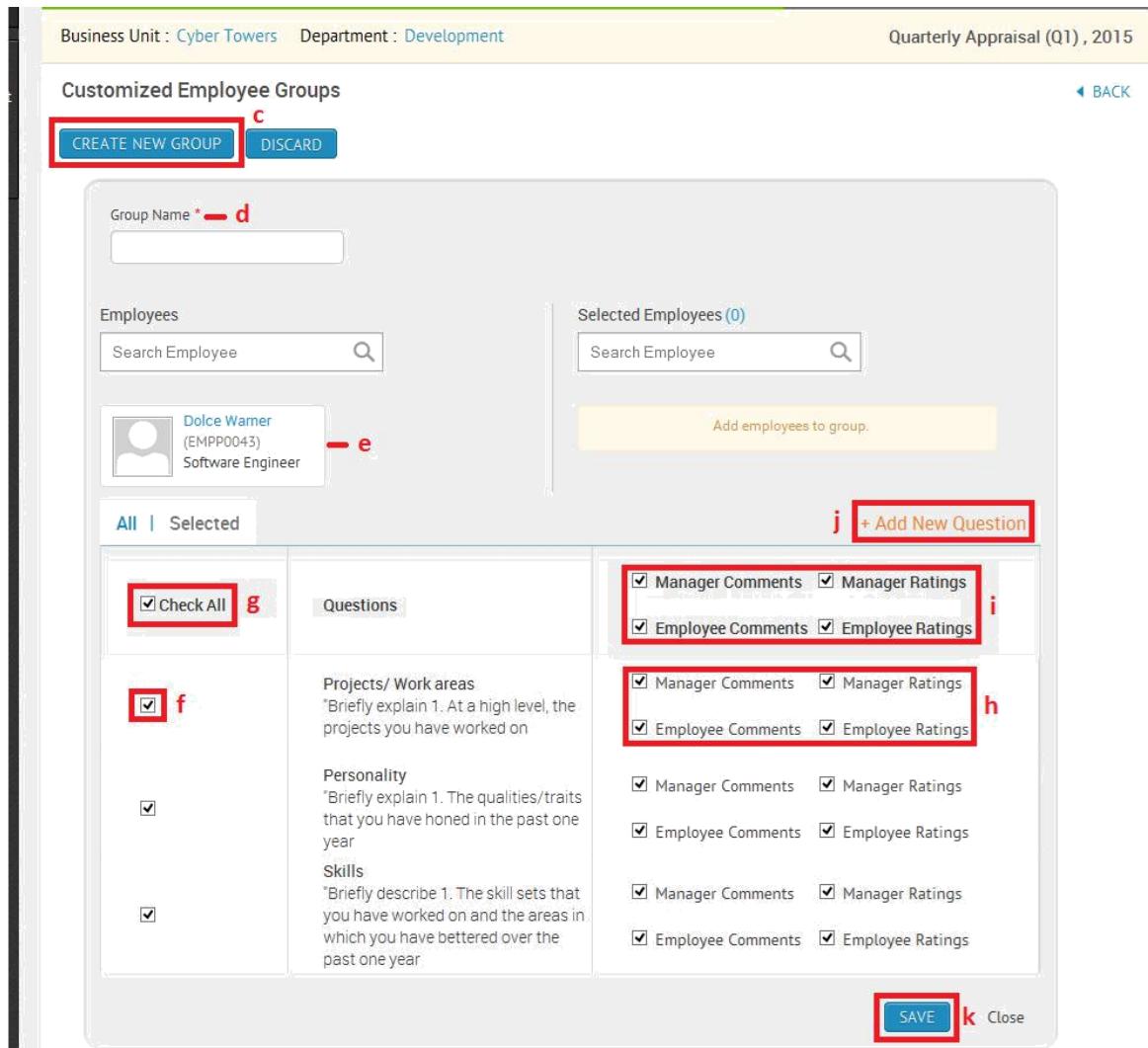
Figure 222

- Click **Customized Employee Groups**

A small confirmation window will open

- Click **Yes** button

Please refer Figure 223



Business Unit : Cyber Towers Department : Development

Quarterly Appraisal (Q1), 2015

Customized Employee Groups

c CREATE NEW GROUP **d** DISCARD

Group Name * **d**

Employees

Search Employee **e**

Dolce Warner (EMPP0043)
Software Engineer

Selected Employees (0)

Search Employee

Add employees to group.

All | Selected

j + Add New Question

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

k SAVE **k** Close

Figure 223

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

Or

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

Or

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

Please refer Figure 224

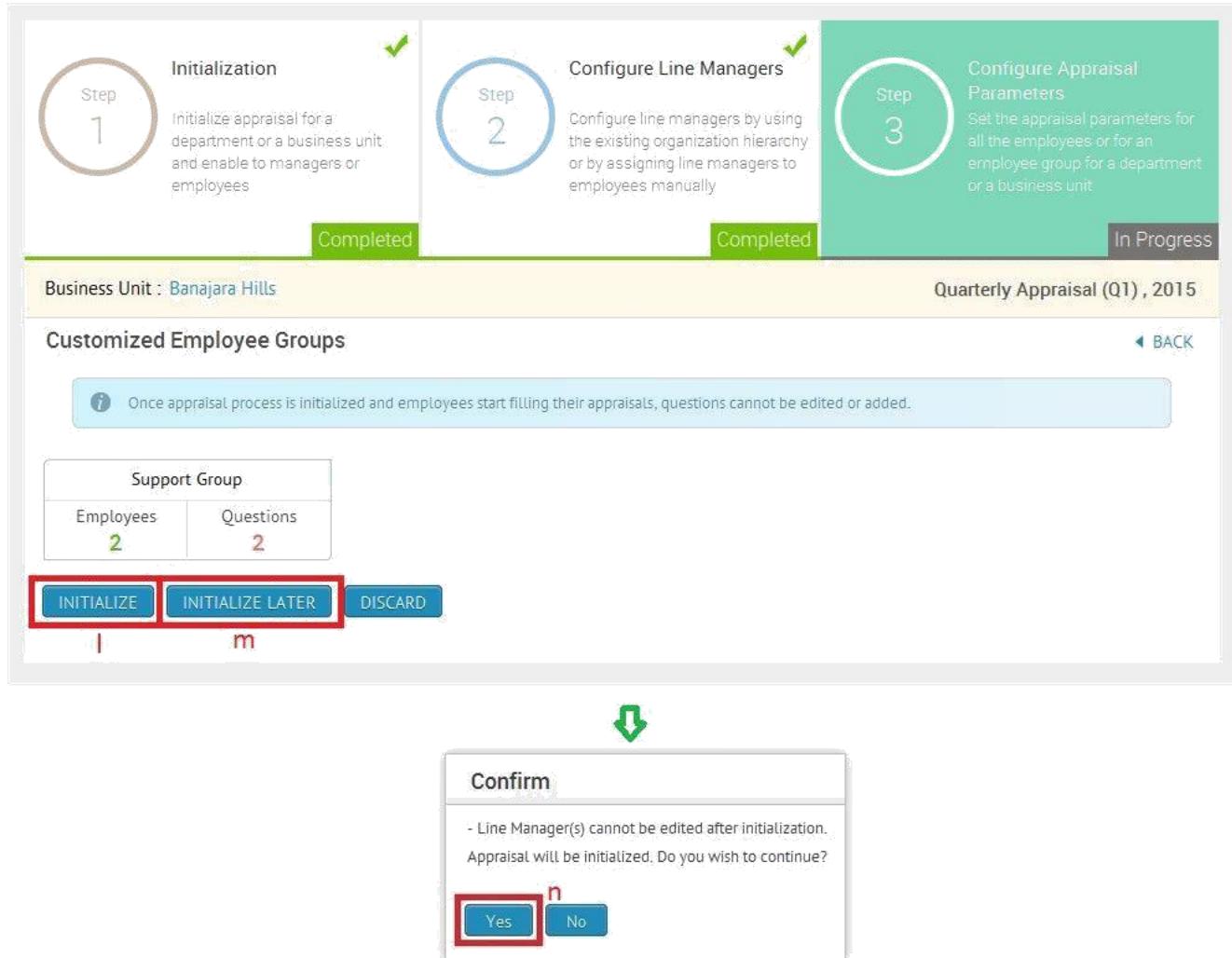


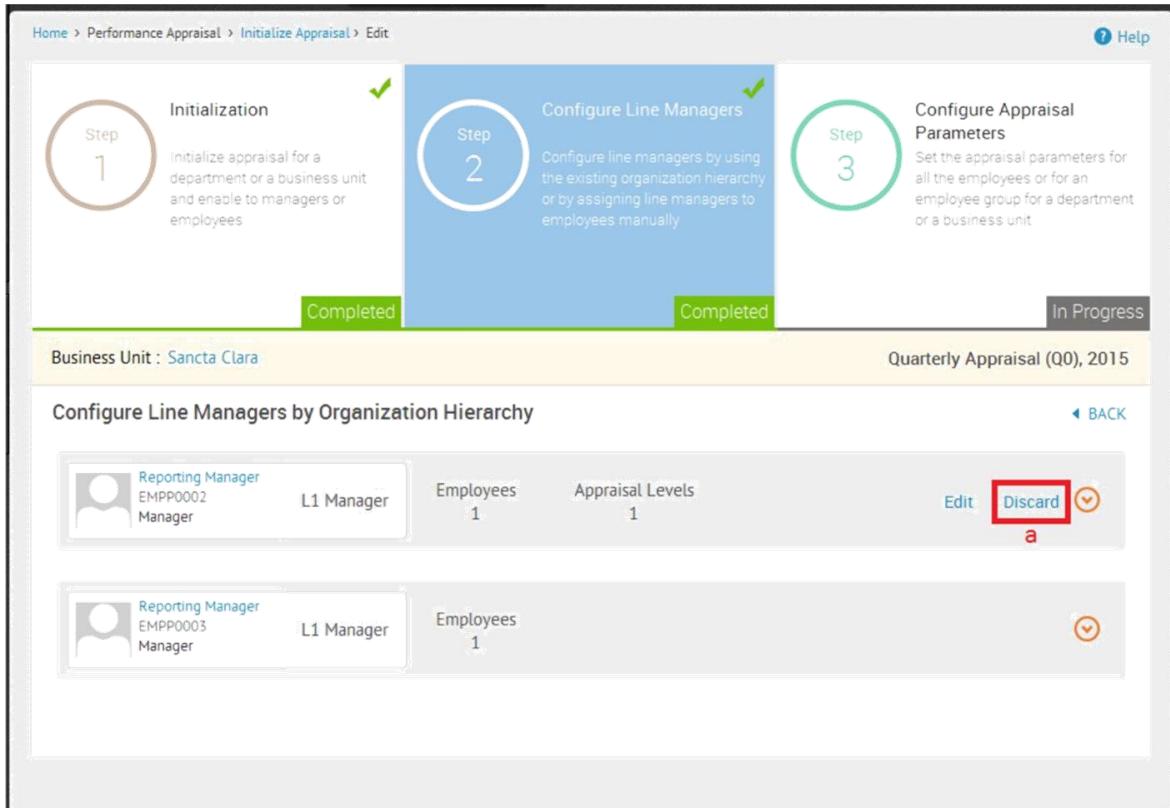
Figure 224

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

16.6 How do I undo/discard Line Manager Configuration?

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

Please refer Figure 224



OR

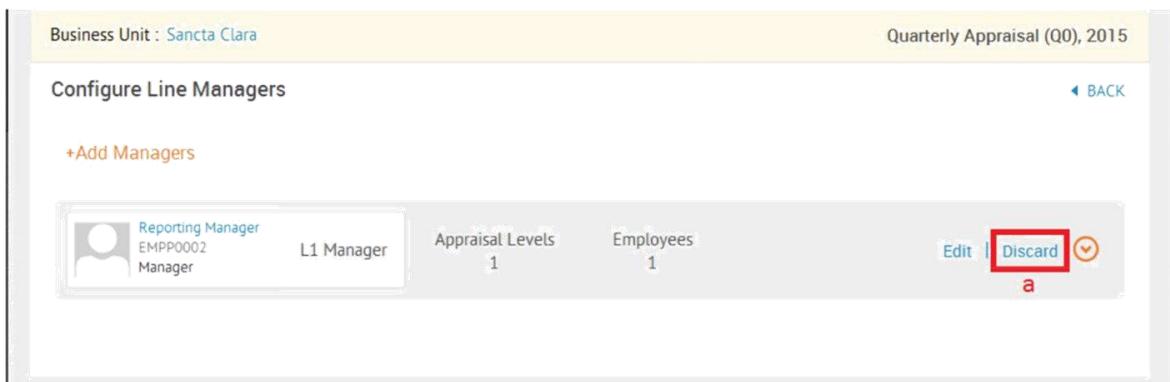


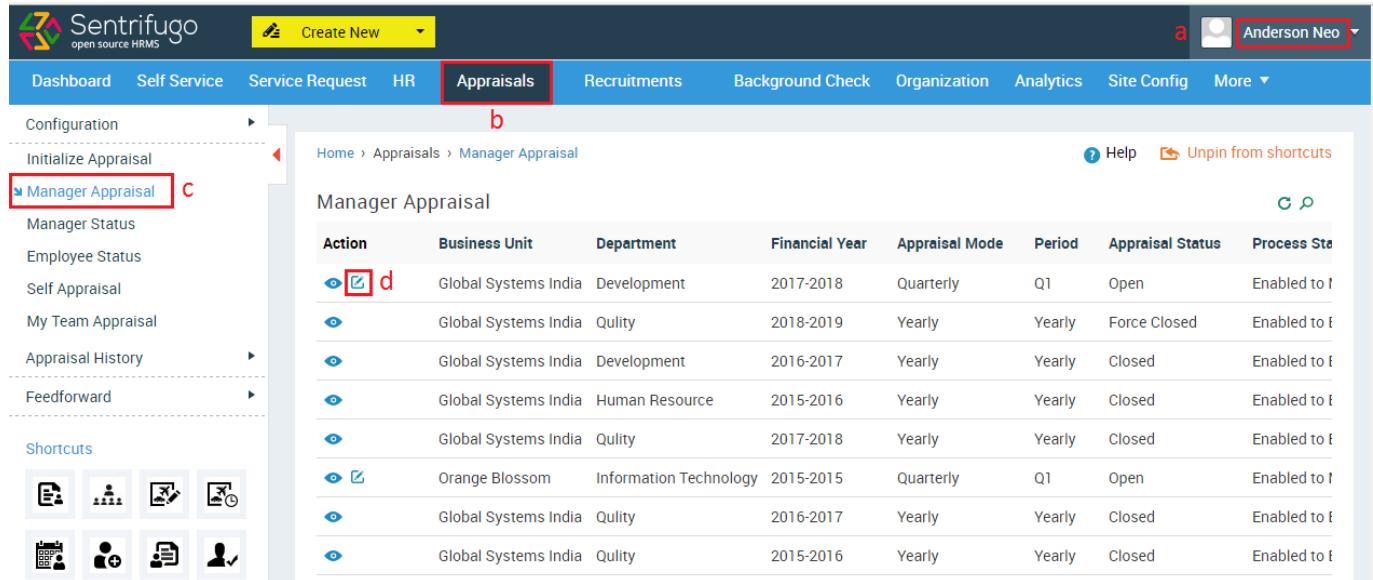
Figure 224

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

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

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

Please refer Figure 225



The screenshot shows the Sentrifugo open source HRMS application. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (which is highlighted with a red box), Recruitments, Background Check, Organization, Analytics, Site Config, and More. A user profile for Anderson Neo is visible on the right. The left sidebar has sections for Configuration (Initialize Appraisal, Manager Appraisal - highlighted with a red box, C), Manager Status, Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, and Feedforward. Below these are Shortcuts with icons for Home, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The main content area, labeled 'b', shows the 'Manager Appraisal' page with a breadcrumb trail: Home > Appraisals > Manager Appraisal. It features a table of appraisal processes:

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

Group Details

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

Group Name *

e

Employees

Search Employee

Employee 1
(EMPP0029)
Software Engineer

f

Selected Employees (0)

Search Employee

Employee 8
(EMPP0029)
Software Engineer

Configure Appraisal Parameters for All Employees

All | Selected
+ Add New Question g

<input checked="" type="checkbox"/> i	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 k
<input checked="" type="checkbox"/> h	New Technologies/skills learn and implemented What are the new technologies/skills you explored and implemented?	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings j
<input checked="" type="checkbox"/>	Responsibility Have you taken complete ownership of the task/project/product assigned to you?	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings

l
Close

Figure 226

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Page 189 of 221

- 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

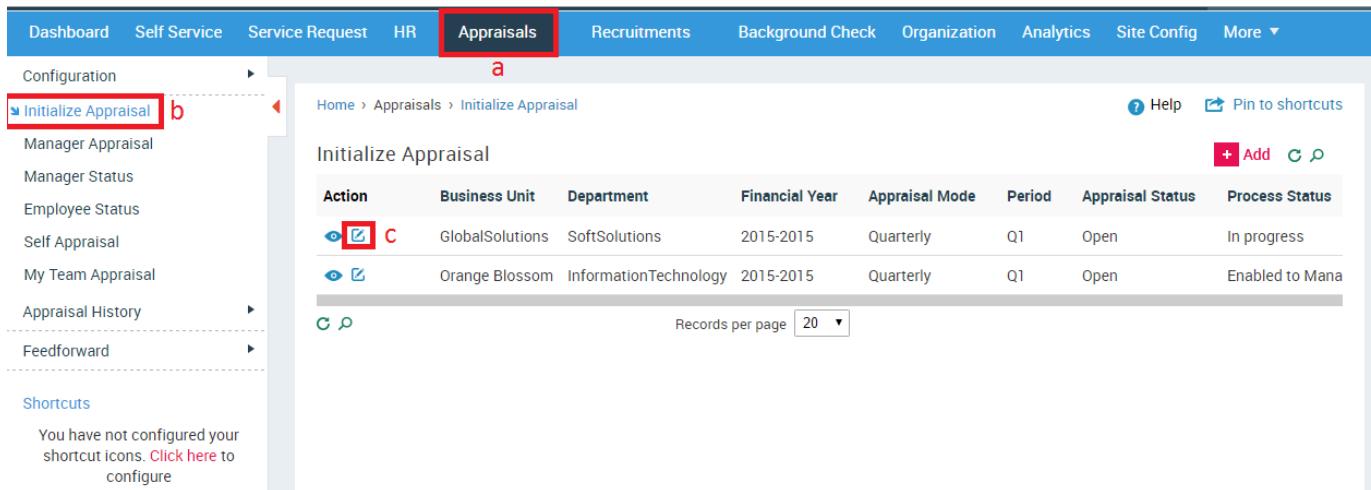
- k. Select Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
- l. Click **SAVE** button

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

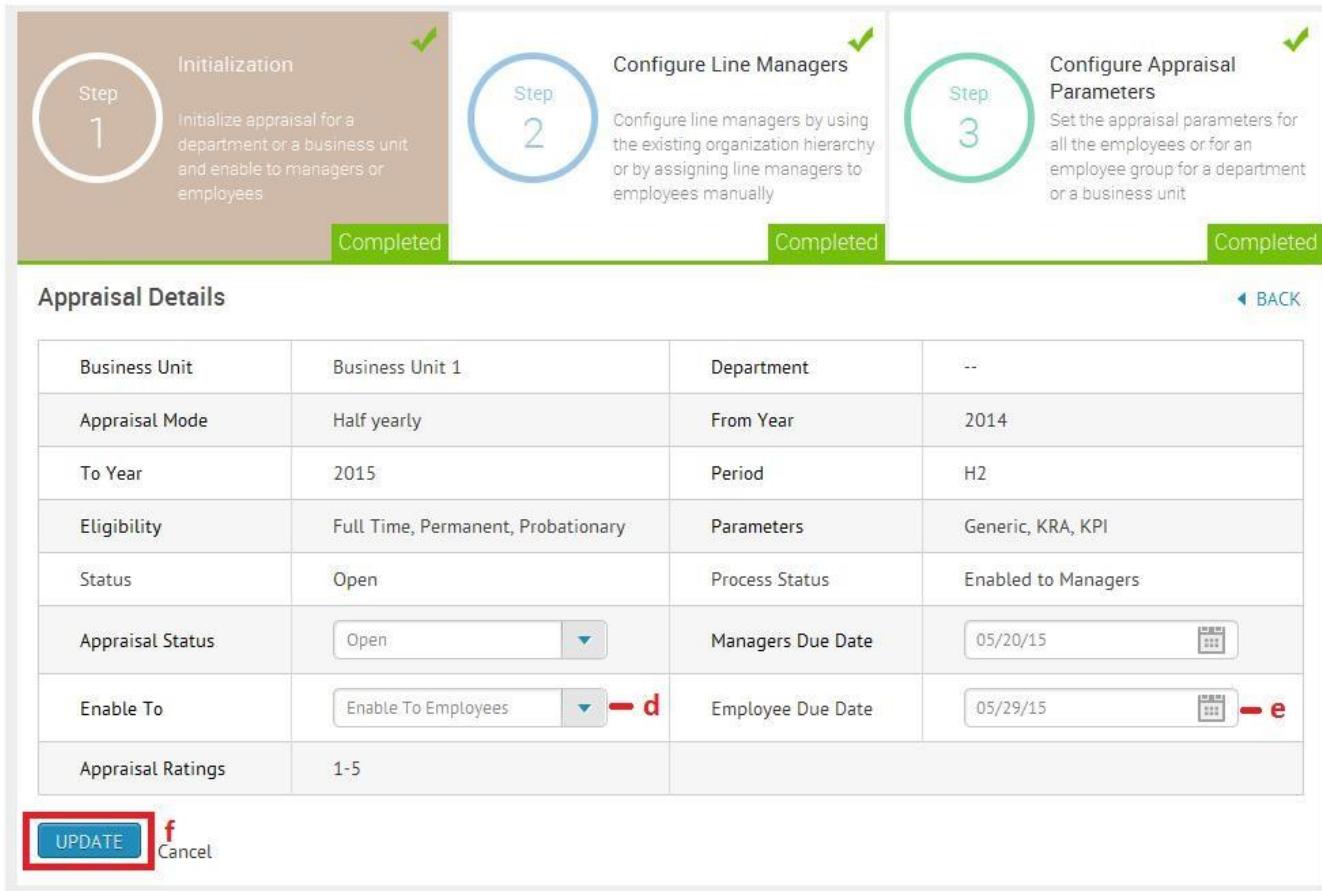


Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
<input checked="" type="checkbox"/> C	GlobalSolutions	SoftSolutions	2015-2015	Quarterly	Q1	Open	In progress
<input checked="" type="checkbox"/>	Orange Blossom	InformationTechnology	2015-2015	Quarterly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

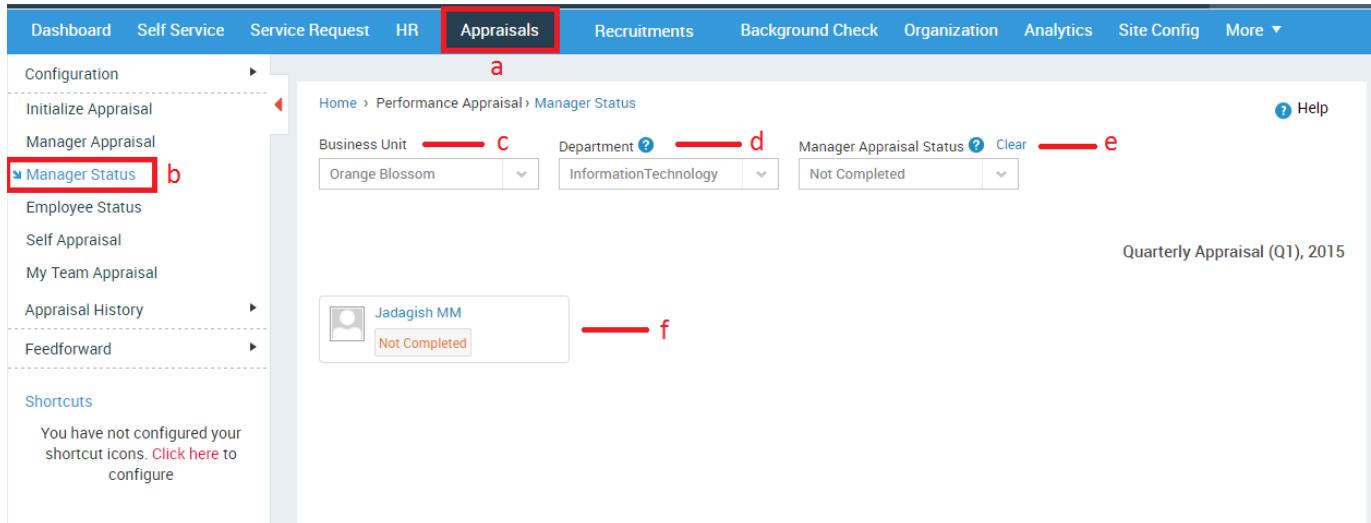
Figure 229

- 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 interface. The top navigation bar has tabs for Dashboard, Self Service, Service Request, HR, Appraisals (which is highlighted with a red box), Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar menu includes Configuration, Initialize Appraisal, Manager Appraisal (highlighted with a red box and labeled 'b'), Manager Status (highlighted with a red box and labeled 'b'), Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, Feedforward, and Shortcuts (with a note about configuring shortcut icons). The main content area shows a breadcrumb path: Home > Performance Appraisal > Manager Status. It displays filters for Business Unit (Orange Blossom, labeled 'c'), Department (InformationTechnology, labeled 'd'), and Manager Appraisal Status (Not Completed, labeled 'e'). Below the filters, a table lists one manager: Jadagish MM, Not Completed (labeled 'f'). A help link and a Quarterly Appraisal (Q1, 2015) link are also visible.

Figure 230

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

16.10 How do I provide Self Appraisal?

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

Please refer Figure 231

Figure 231

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

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

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

Please refer Figure 232

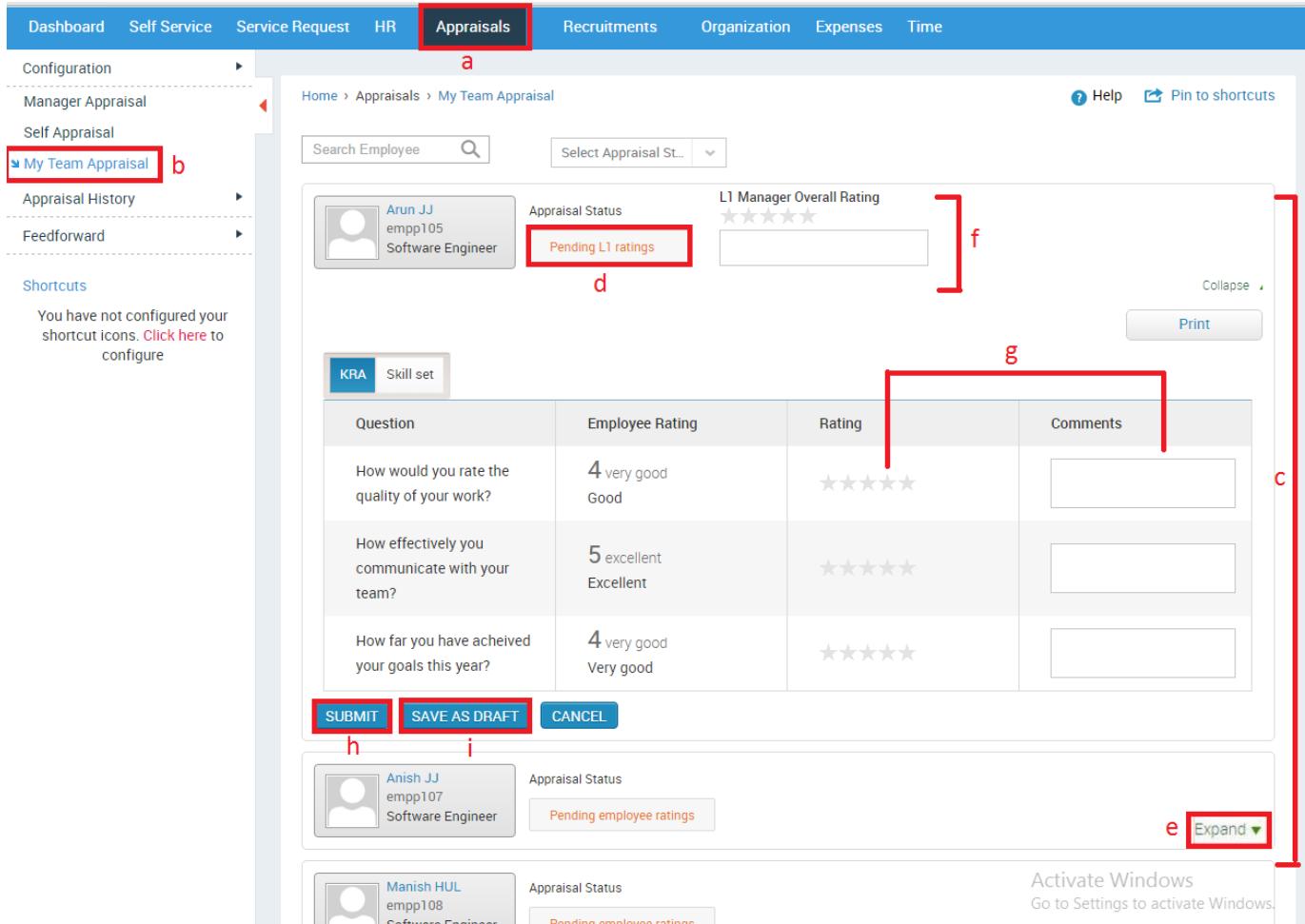


Figure 232

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

16.12 How do I check Employee Status?

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

Please refer Figure 30

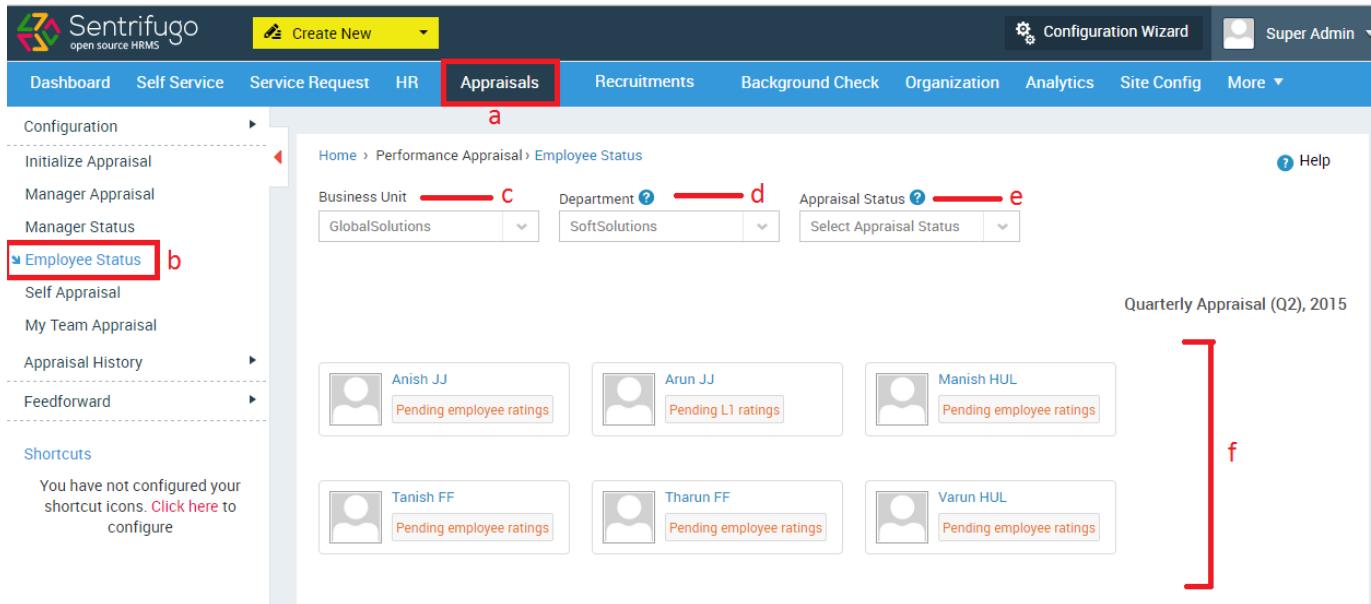


Figure 233

- 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

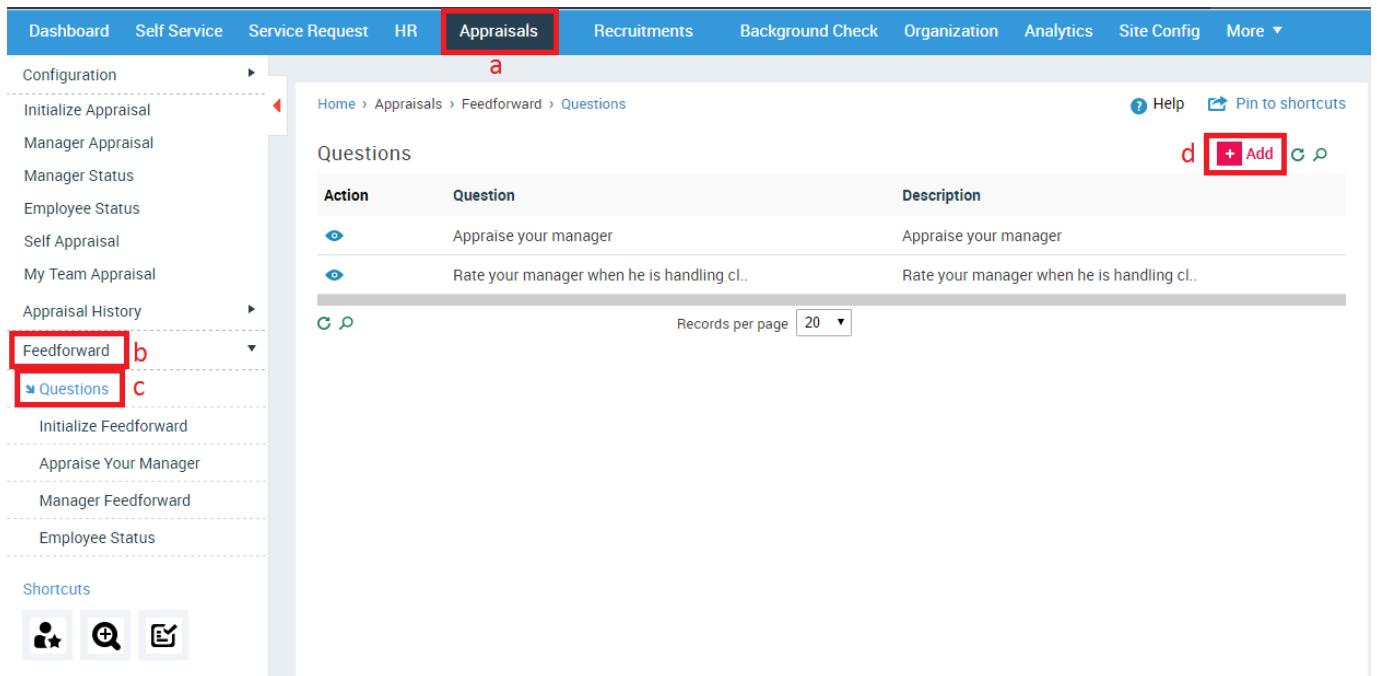
16.13 What is Feedforward?

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

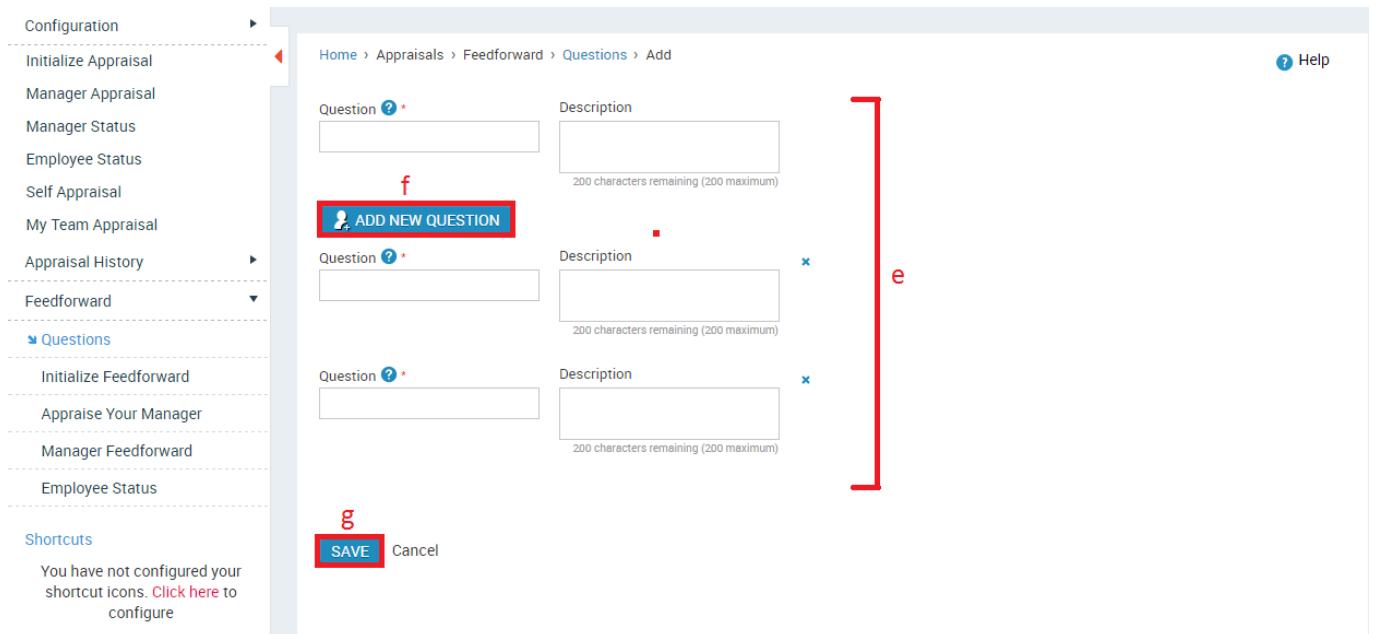


The screenshot shows the Sentrifugo interface with the following navigation path: Home > Appraisals > Feedforward > Questions. The top menu bar includes Dashboard, Self Service, Service Request, HR, Appraisals (highlighted with a red box), Recruitments, Background Check, Organization, Analytics, Site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

Figure 234

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

Please refer Figure 235



The screenshot shows the 'Add Question' form within the Sentrifugo interface. The left sidebar is identical to Figure 234. The main form has two sections. The first section contains fields for 'Question ? *' (with a red box) and 'Description' (with a note '200 characters remaining (200 maximum)'). Below this is a blue button labeled 'ADD NEW QUESTION' with a red box around it. The second section is a repeatable row with fields for 'Question ? *' (with a red box), 'Description' (with a note '200 characters remaining (200 maximum)'), and a delete 'x' icon. A red bracket labeled 'e' groups the second section. At the bottom are 'SAVE' and 'Cancel' buttons, with 'SAVE' highlighted by a red box. A red bracket labeled 'g' groups the 'SAVE' and 'Cancel' buttons.

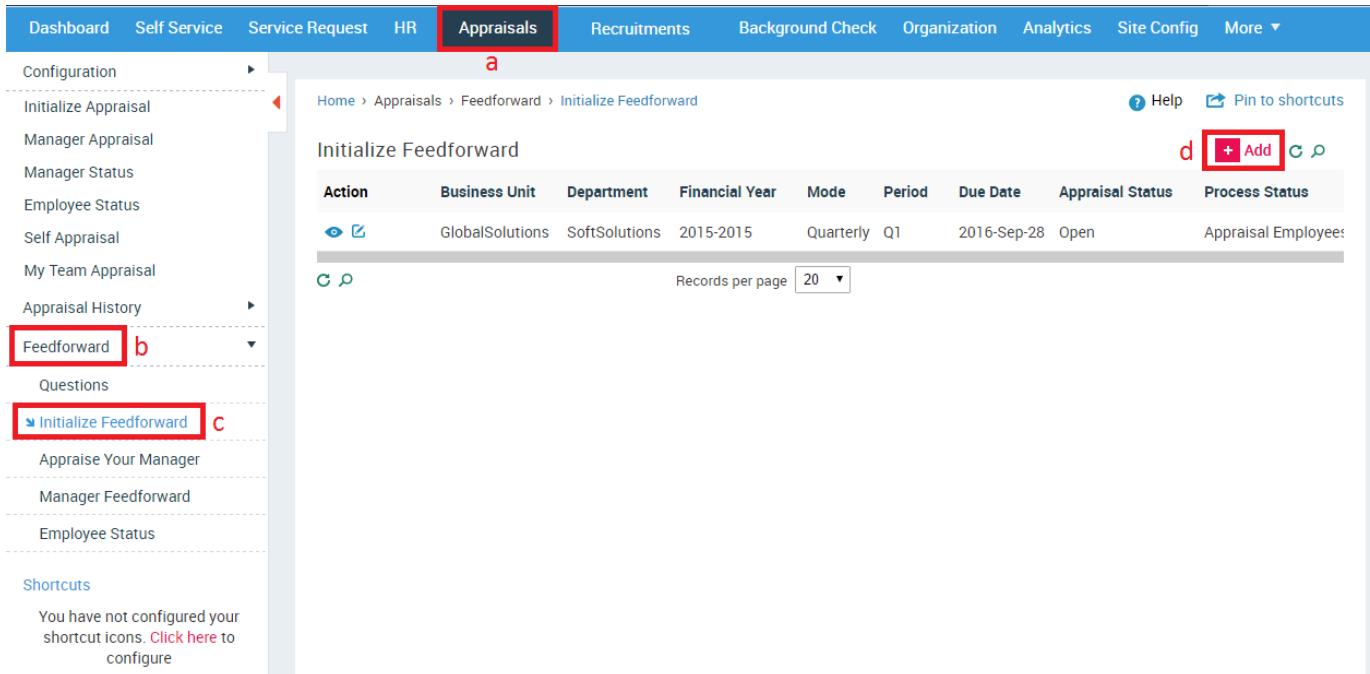
Figure 235

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

16.15 How do I initialize Feedforward?

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

Please refer Figure 237

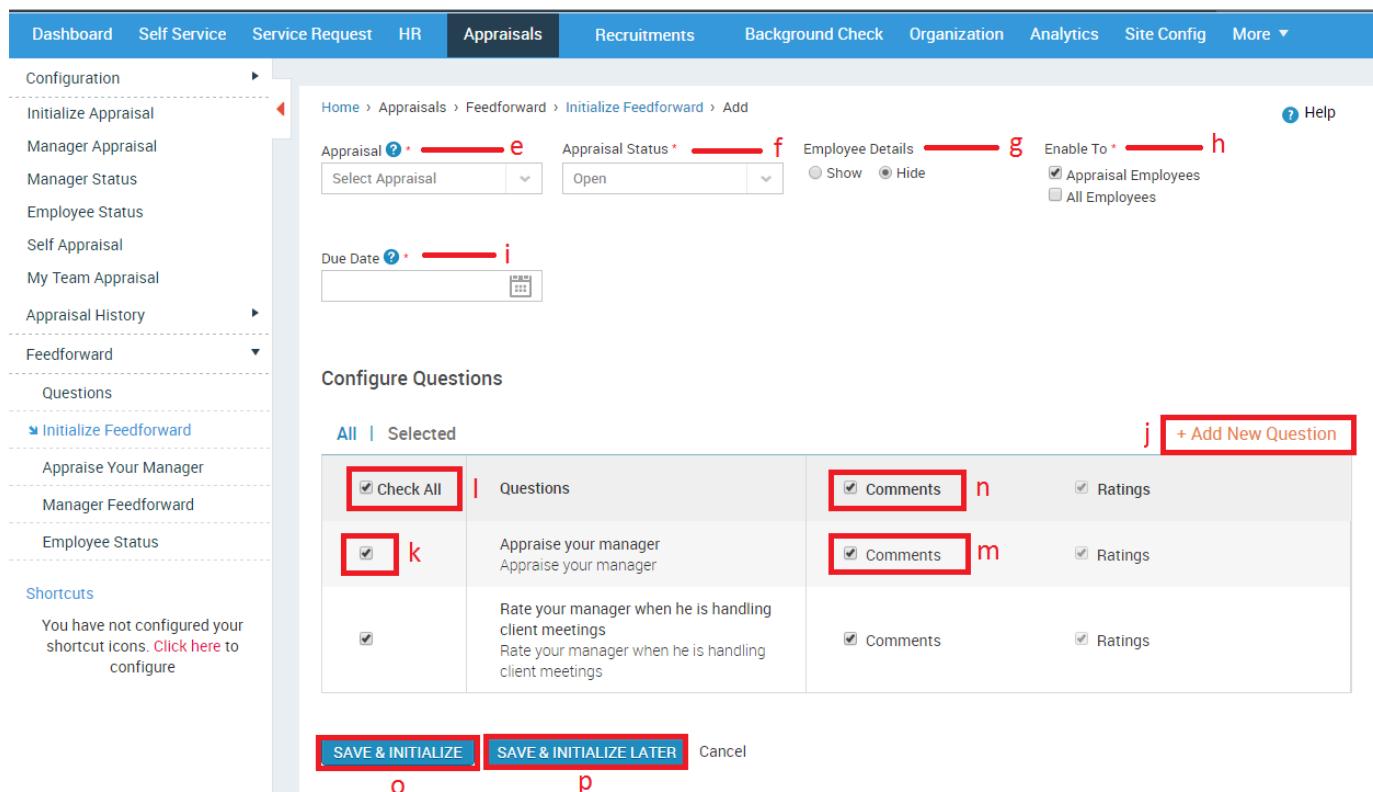


Action	Business Unit	Department	Financial Year	Mode	Period	Due Date	Appraisal Status	Process Status
	GlobalSolutions	SoftSolutions	2015-2015	Quarterly	Q1	2016-Sep-28	Open	Appraisal Employees

Figure 237

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

Please refer Figure 238



The screenshot shows the 'Initialize Feedforward' screen in the Sentrifugo Appraisals module. The left sidebar has sections for Configuration, Manager Appraisal, Manager Status, Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, Feedforward (selected), and Questions. Under Feedforward, there are links for Initialize Feedforward, Appraise Your Manager, Manager Feedforward, and Employee Status. A Shortcuts section indicates no shortcut icons are configured. The main panel shows the 'Initialize Feedforward' form with fields for Appraisal (dropdown e), Appraisal Status (dropdown f), Employee Details (radio buttons g), Due Date (text input i), and a 'Configure Questions' section with a grid of questions (k) and checkboxes for Comments (m) and Ratings (n). Buttons at the bottom include 'SAVE & INITIALIZE' (o), 'SAVE & INITIALIZE LATER' (p), and 'Cancel'.

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

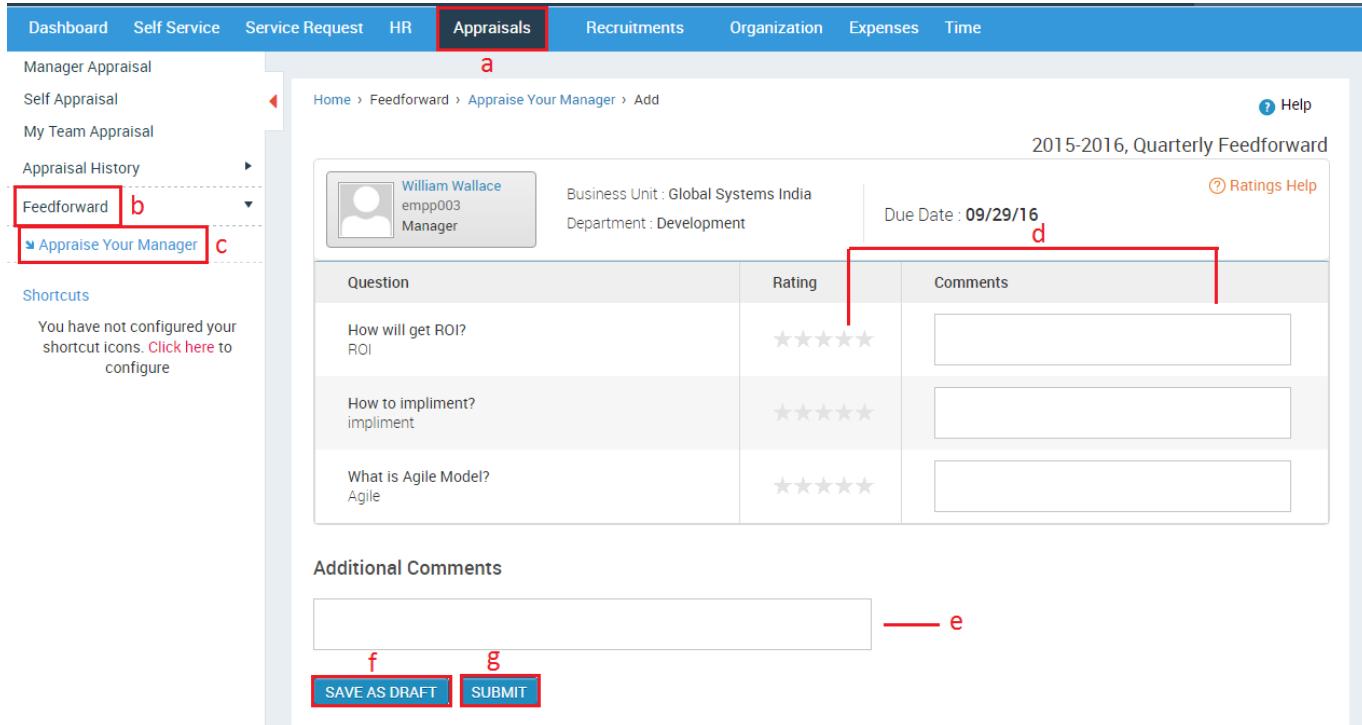
Or

- 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



The screenshot shows the Sentrifugo HRMS application interface. The top navigation bar has a blue background with white text. The 'Appraisals' tab is highlighted. The left sidebar has a grey background with white text. The main content area has a white background with black text and some blue links. There are several red boxes and arrows labeled 'a' through 'g' pointing to specific UI elements.

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

Additional Comments

SAVE AS DRAFT SUBMIT

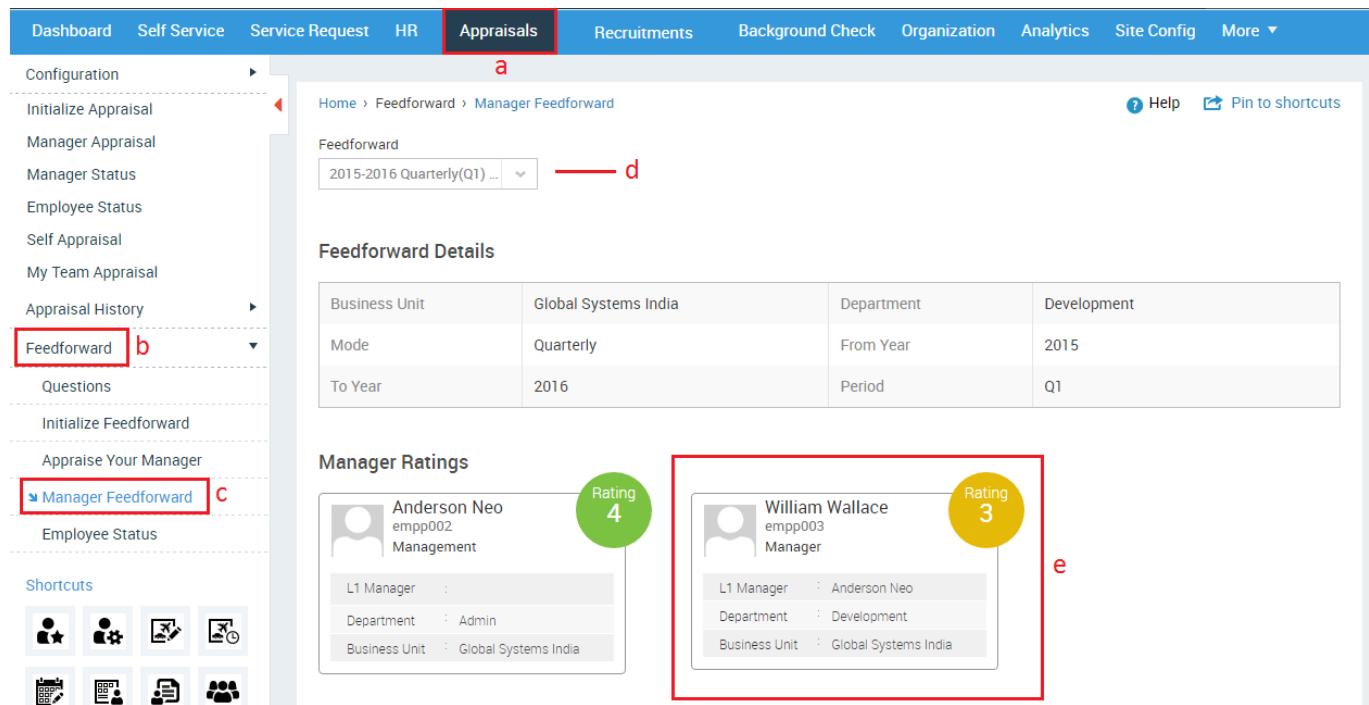
Figure 240

- 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



a

b

c

d

e

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

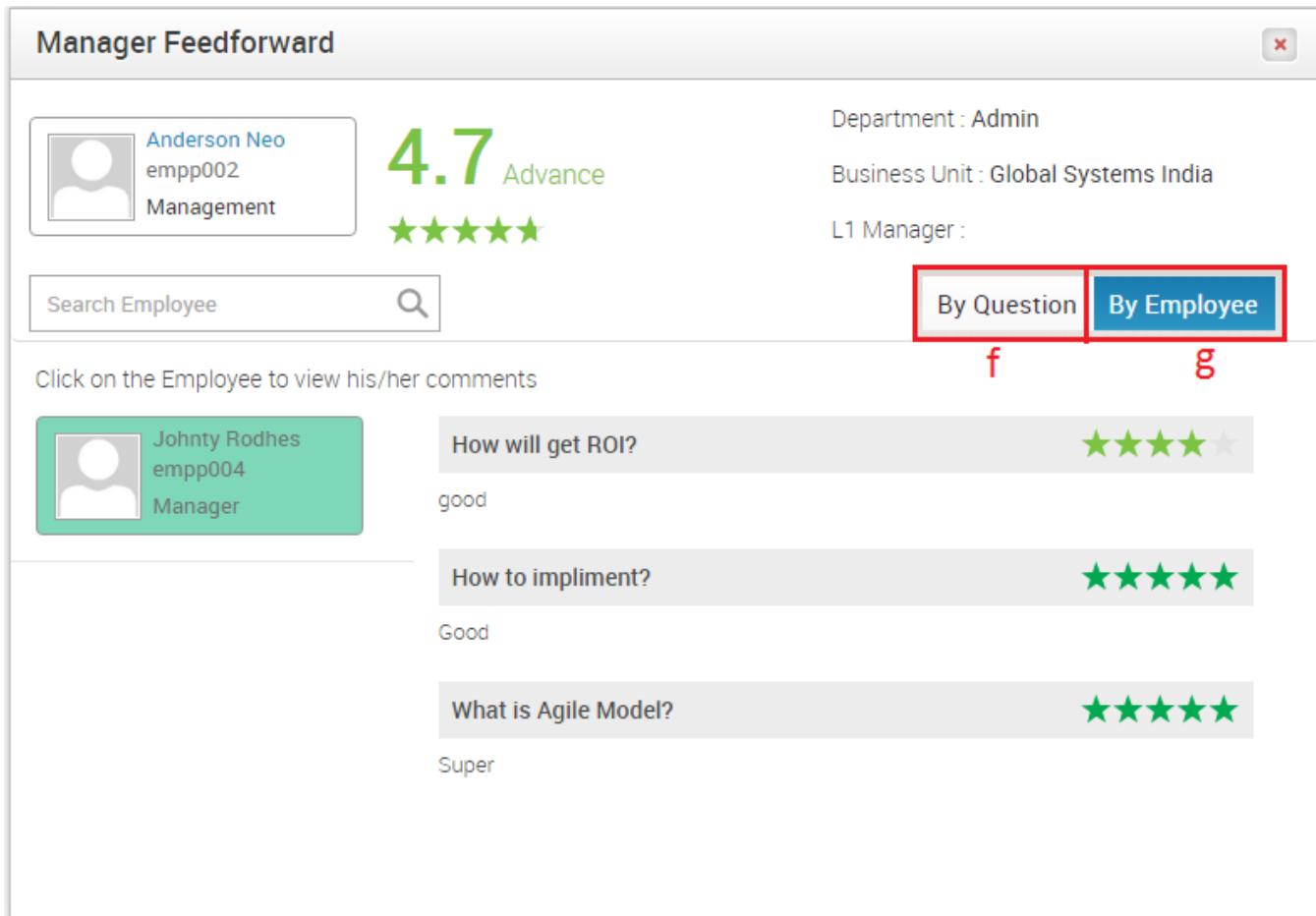


Figure 243

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

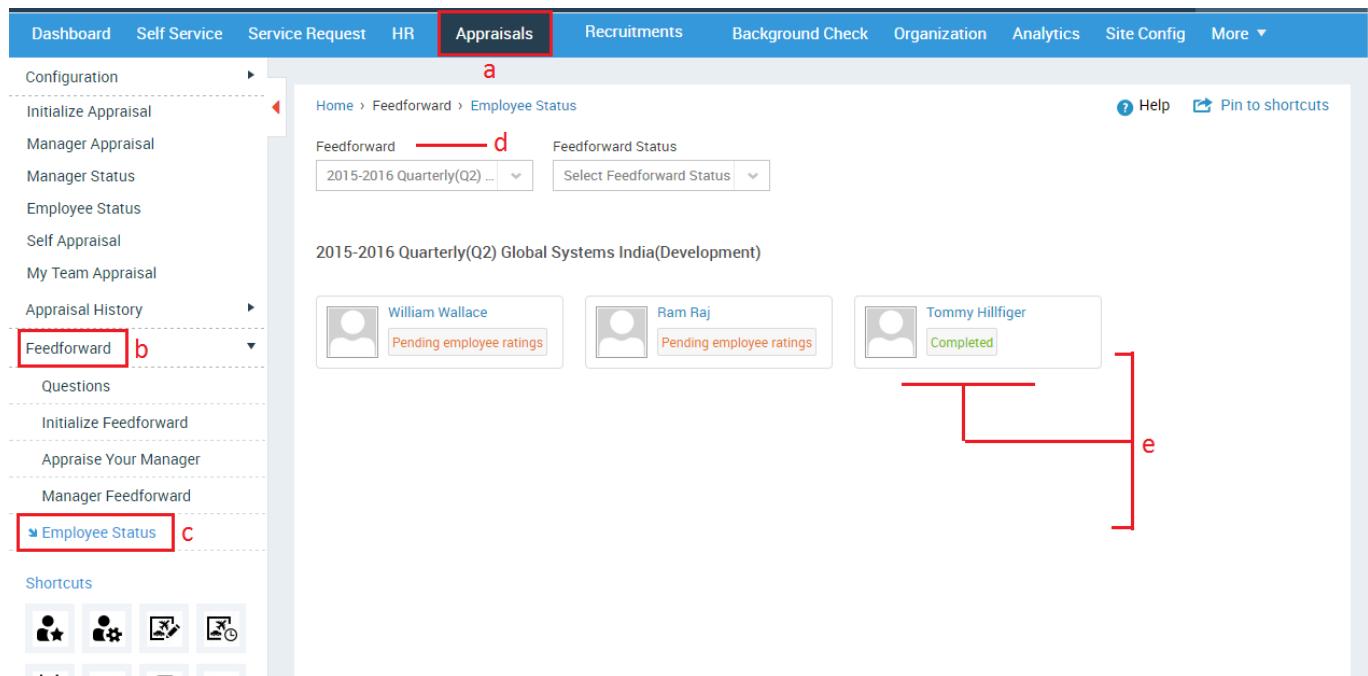


Figure 244

- 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

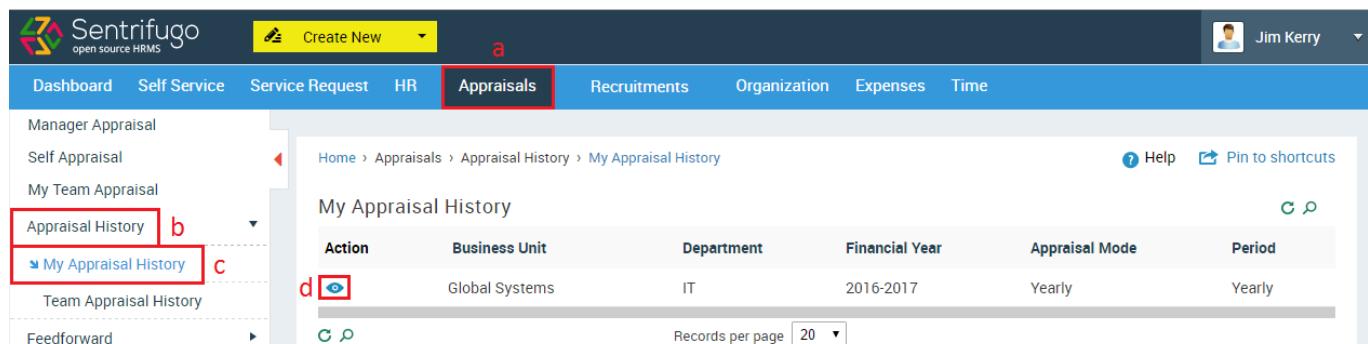
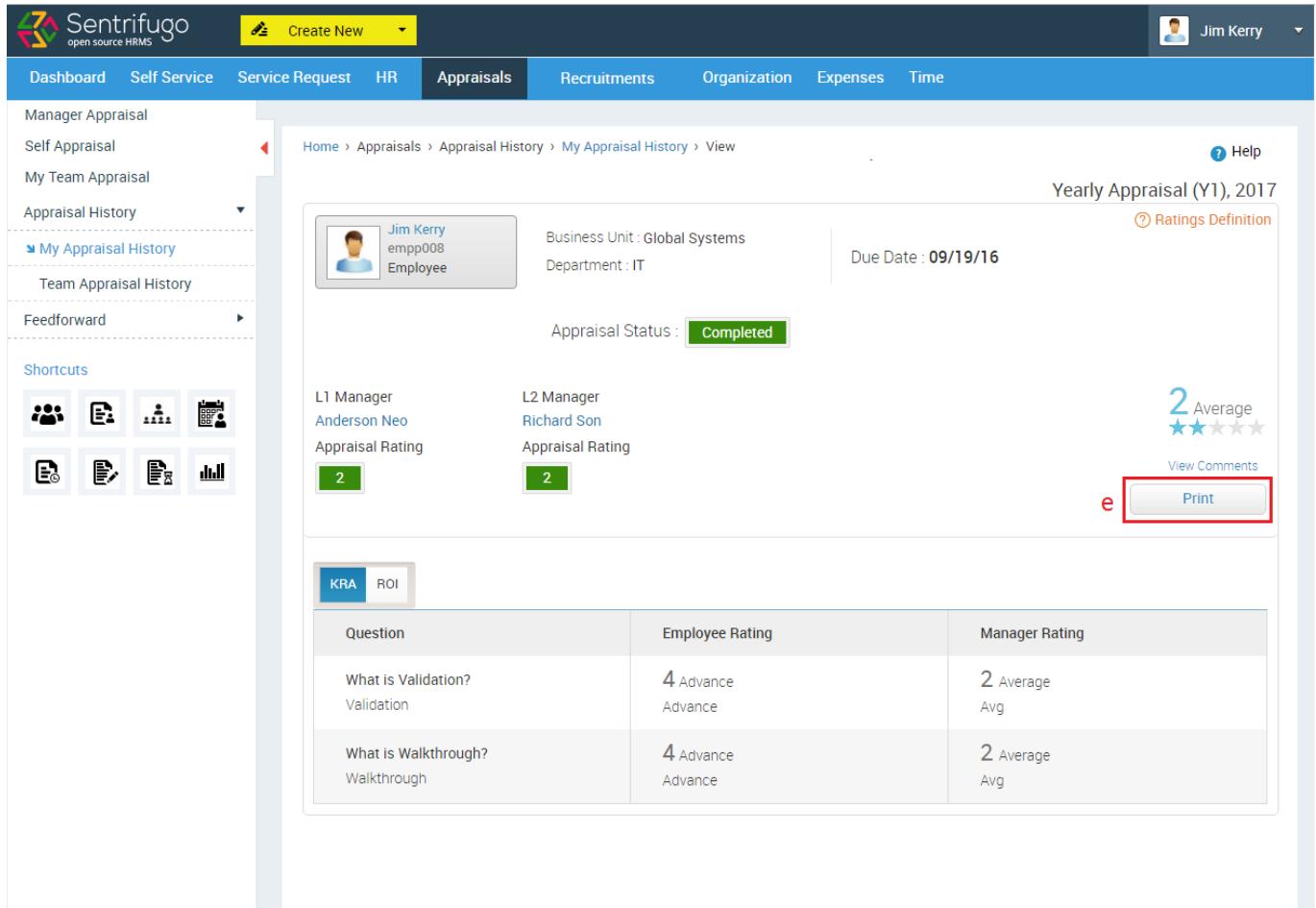


Figure 245

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

- d. Click **View** icon

Please refer Figure 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), Recruitments, Organization, Expenses, and Time. A user profile for Jim Kerry is visible in the top right corner. The left sidebar contains links for Manager Appraisal, Self Appraisal, My Team Appraisal, Appraisal History (with a sub-link for 'My Appraisal History'), Team Appraisal History, Feedforward, and Shortcuts (with icons for users, documents, reports, and charts). The main content area displays Jim Kerry's appraisal details for the Yearly Appraisal (Y1), 2017. It shows his profile picture, name (Jim Kerry), employee ID (empp008), and title (Employee). His business unit is Global Systems and department is IT. The appraisal status is 'Completed'. Below this, L1 and L2 manager details are listed: Anderson Neo (L1 Manager) and Richard Son (L2 Manager). Appraisal ratings are shown as 2 stars each. A 'Print' button is highlighted with a red box. At the bottom, a table compares KRA and ROI for two questions: 'What is Validation?' and 'What is Walkthrough?'. The table columns are 'Question', 'Employee Rating', and 'Manager Rating'. For 'Validation', the employee rating is 4 Advance and the manager rating is 2 Average. For 'Walkthrough', the employee rating is 4 Advance and the manager rating is 2 Average.

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.

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

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

Please refer Figure 247

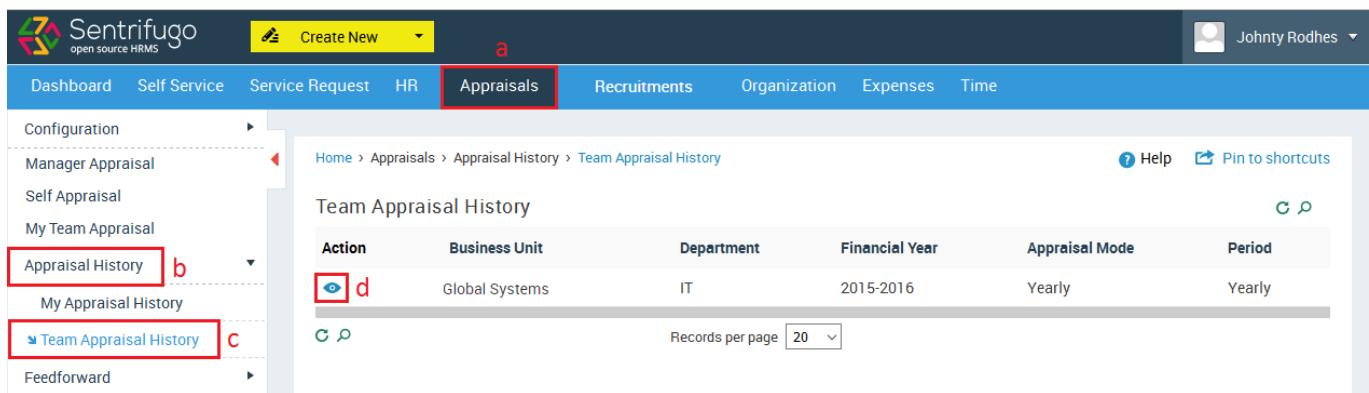


Figure 247

- 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

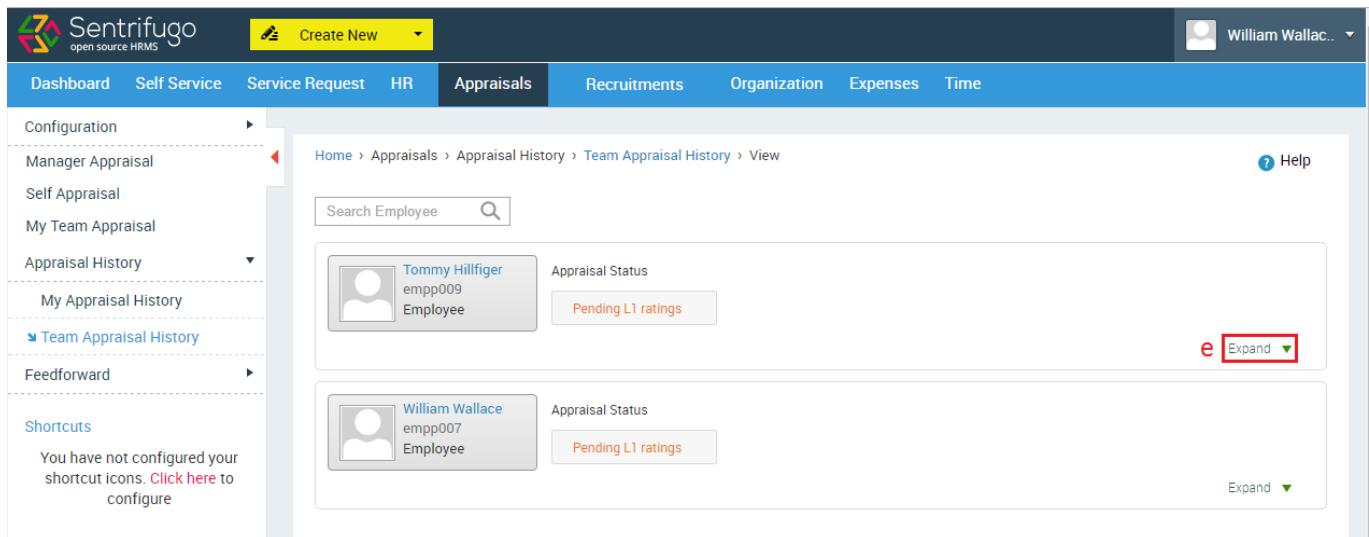
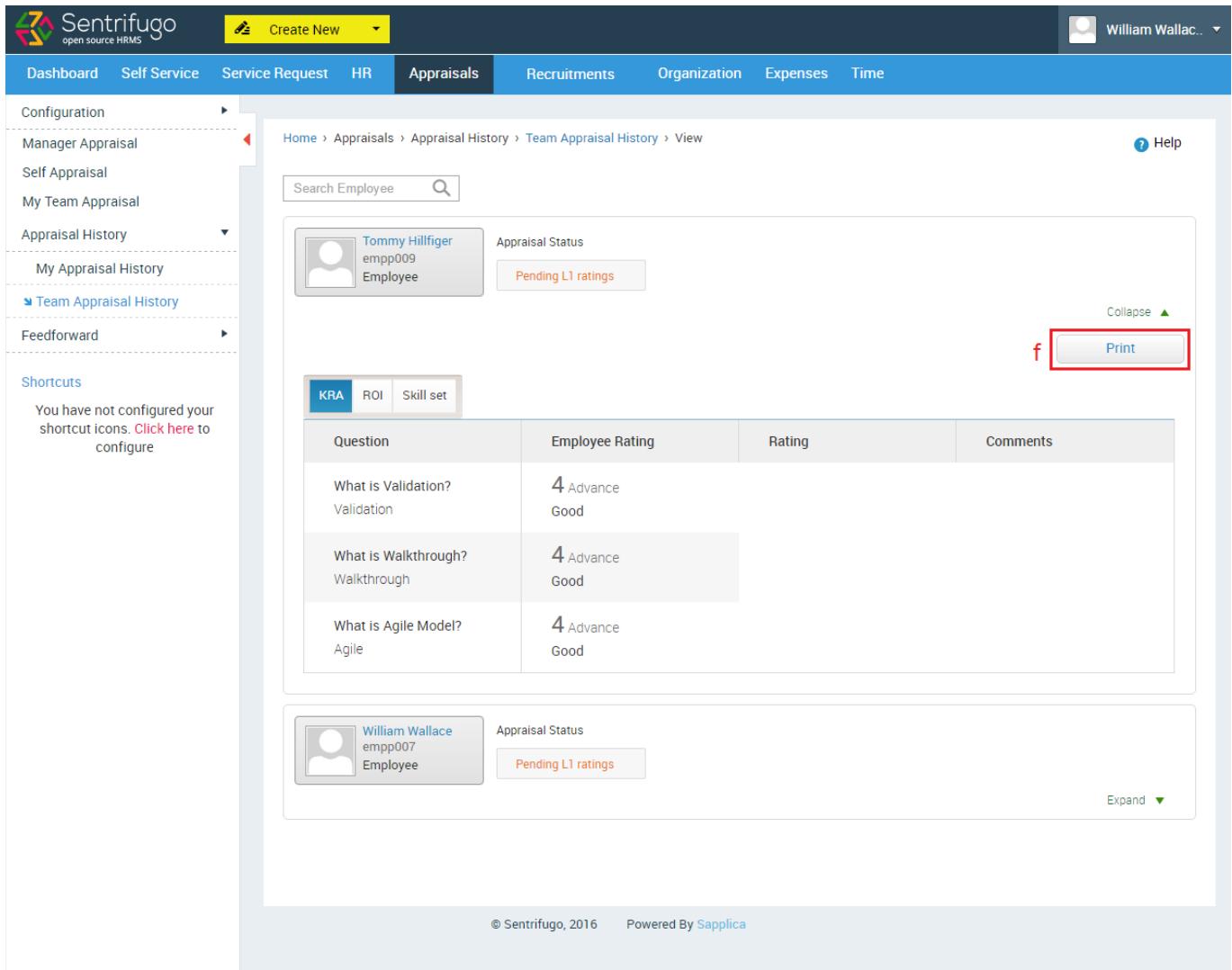


Figure 248

- 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 Create New, Dashboard, Self Service, Service Request, HR, Appraisals (which is selected), Recruitments, Organization, Expenses, and Time. A user profile for William Wallace is visible on the right.

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

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

A table below shows the appraisal questions and their responses:

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

Below this, another section shows the profile for William Wallace (emp007) with the same pending rating status.

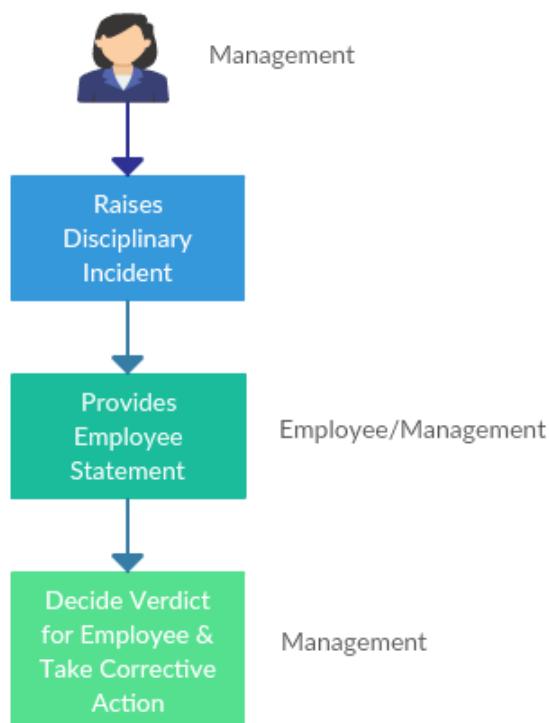
At the bottom, there are copyright and power information: © Sentrifugo, 2016 and Powered By Sapplica.

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 misdemeanour evidence, he/she can be pronounced guilty/no guilty. If found guilty, a corrective action can be taken.



Process

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

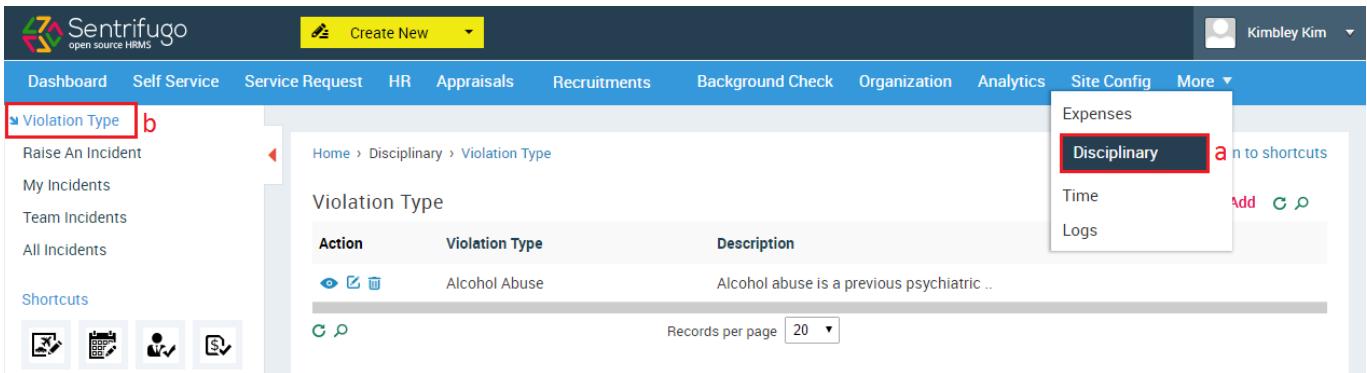
Description: (Management)

17.1 How do I create a Violation Type?



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

Please refer Figure 250

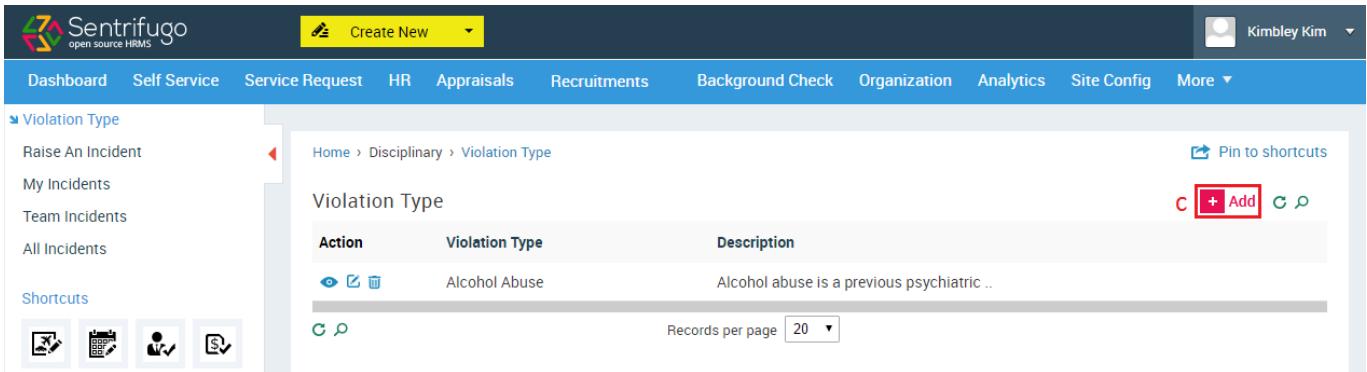


The screenshot shows the Sentrifugo application interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The 'More' dropdown is open, showing options like Expenses, Disciplinary (which is highlighted with a red box and labeled 'a'), Time, and Logs. On the left, a sidebar has a 'Violation Type' link (highlighted with a red box and labeled 'b'). The main content area displays a grid titled 'Violation Type' with columns for Action, Violation Type, and Description. One row shows 'Alcohol Abuse' with the description 'Alcohol abuse is a previous psychiatric ..'. At the bottom of the grid, there are buttons for 'C' (Create), 'P' (Print), and 'R' (Refresh). The page also includes a breadcrumb trail: Home > Disciplinary > Violation Type, and a 'Records per page' dropdown set to 20.

Figure 250

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

Please refer Figure 251

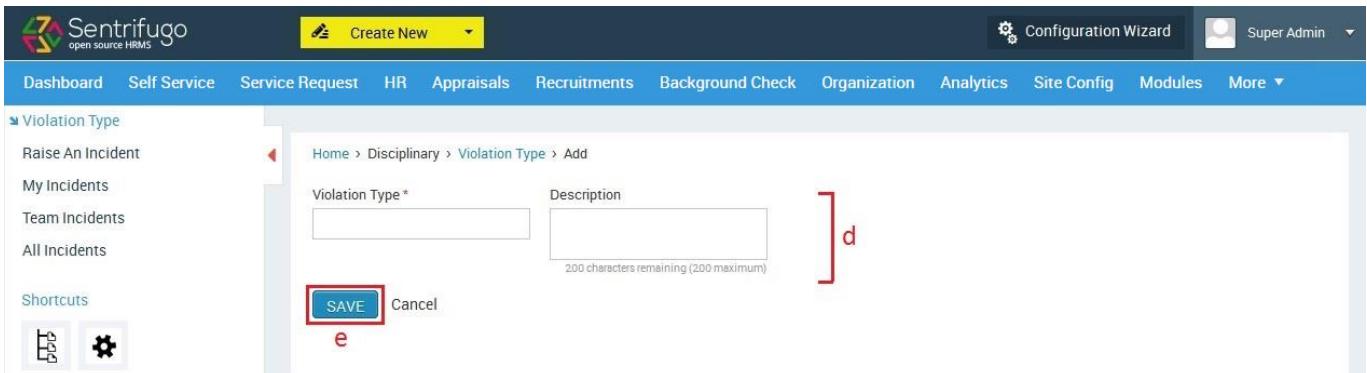


This screenshot is similar to Figure 250, showing the Violation Type grid. The 'Disciplinary' link in the top right menu is still highlighted with a red box and labeled 'a'. The '+Add' button in the top right corner of the grid is highlighted with a red box and labeled 'c'. The rest of the interface, including the sidebar and grid details, is identical to Figure 250.

Figure 251

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

Please refer Figure 252



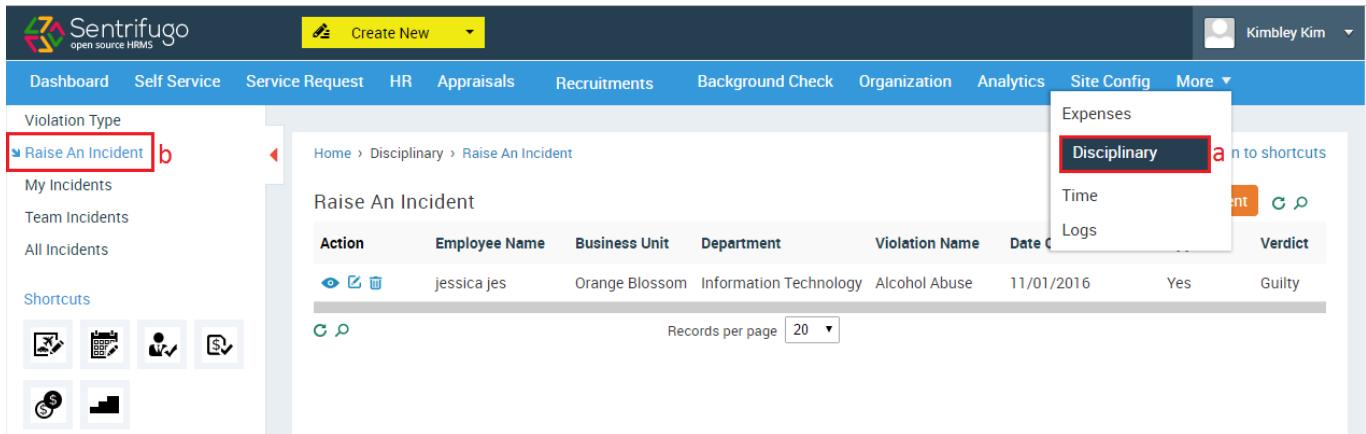
This screenshot shows the 'Add' form for a new Violation Type. The top navigation bar includes links for Configuration Wizard and Super Admin. The main form has fields for 'Violation Type *' and 'Description'. The 'Description' field has a note: '200 characters remaining (200 maximum)'. Below the fields are 'SAVE' and 'Cancel' buttons. A red bracket labeled 'd' points to the 'Description' field, and another red bracket labeled 'e' points to the 'SAVE' button.

Figure 252

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

17.2 How do I raise a disciplinary incident?

Please refer Figure 253

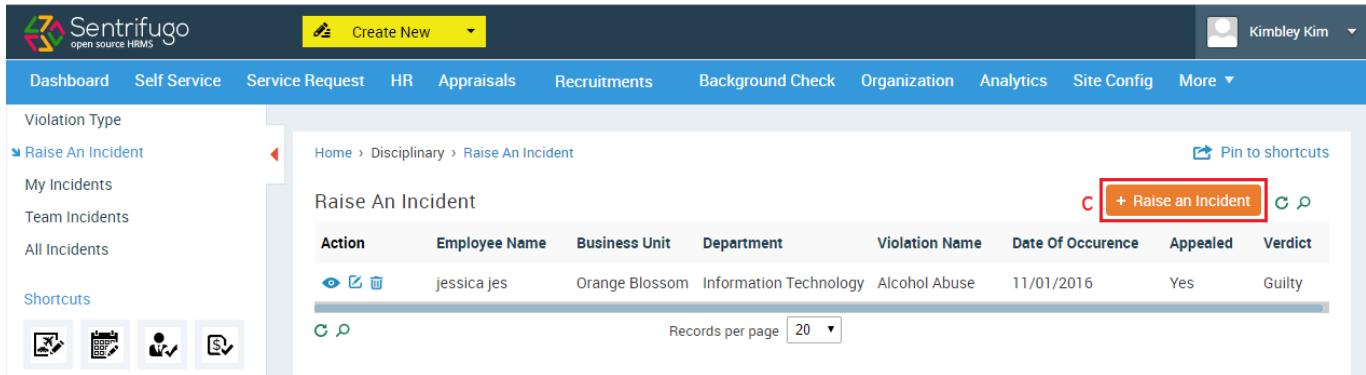


The screenshot shows the Sentrifugo web interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A dropdown menu under 'More' is open, showing options like Expenses, Disciplinary (which is highlighted with a red box), Time, Logs, and Verdict. Below the navigation, a breadcrumb trail shows Home > Disciplinary > Raise An Incident. The main content area is titled 'Raise An Incident' and displays a grid of data. The columns are Action, Employee Name, Business Unit, Department, Violation Name, Date Of Occurrence, Appealed, and Verdict. One row is visible with the following data: Action (eye, edit, delete), 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). At the bottom of the grid, there are buttons for 'Records per page' (set to 20) and a 'C P' button.

Figure 253

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

Please refer Figure 254



This screenshot is identical to Figure 253, showing the 'Raise An Incident' page. The 'Disciplinary' menu item is highlighted with a red box in the top navigation bar. The 'Raise An Incident' link in the left sidebar is also highlighted with a red box. The main content area shows the same grid of data with one row: Action (eye, edit, delete), 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 '+ Raise an Incident' button at the top right of the grid is highlighted with a red box.

Figure 254

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

Please refer Figure 255

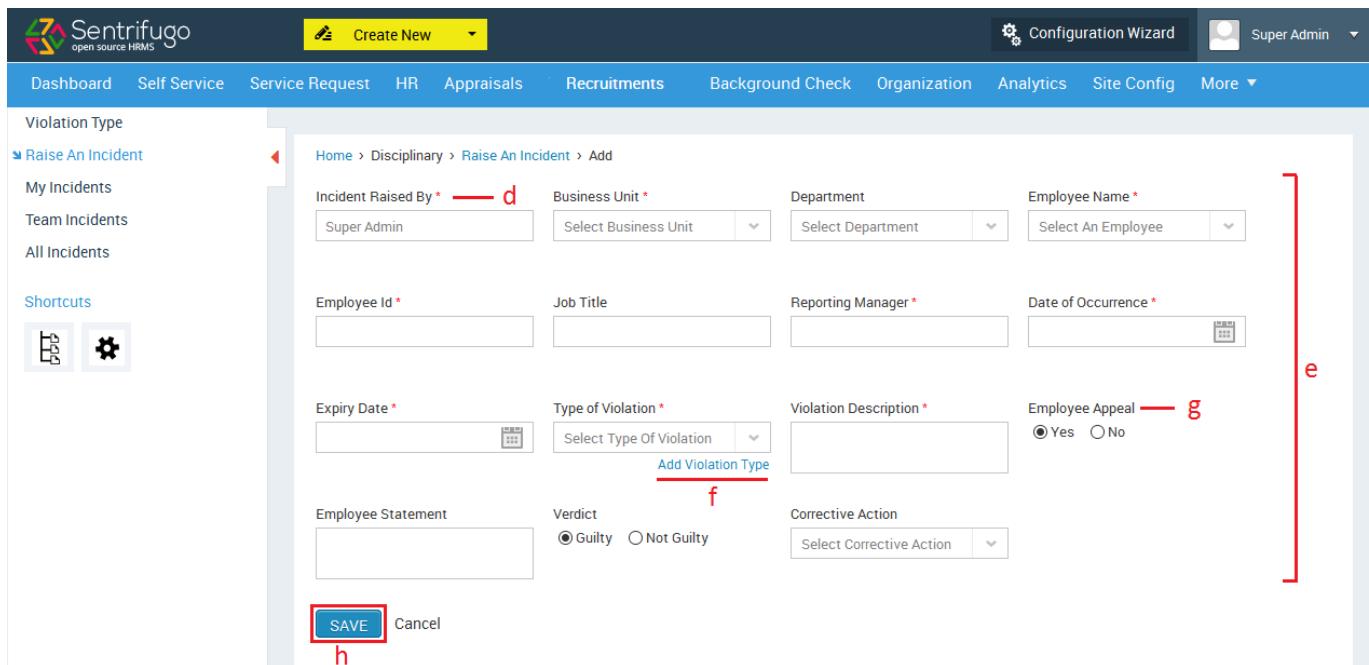
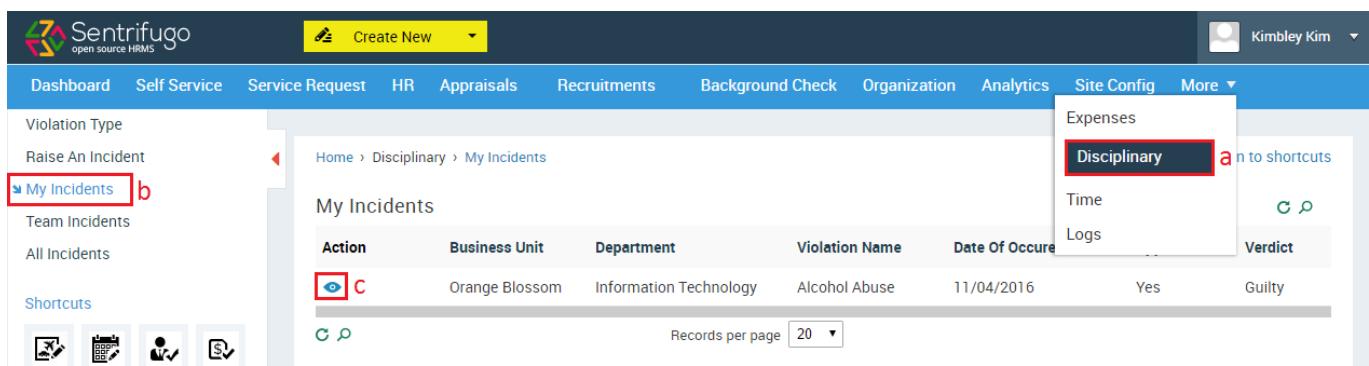


Figure 255

- 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



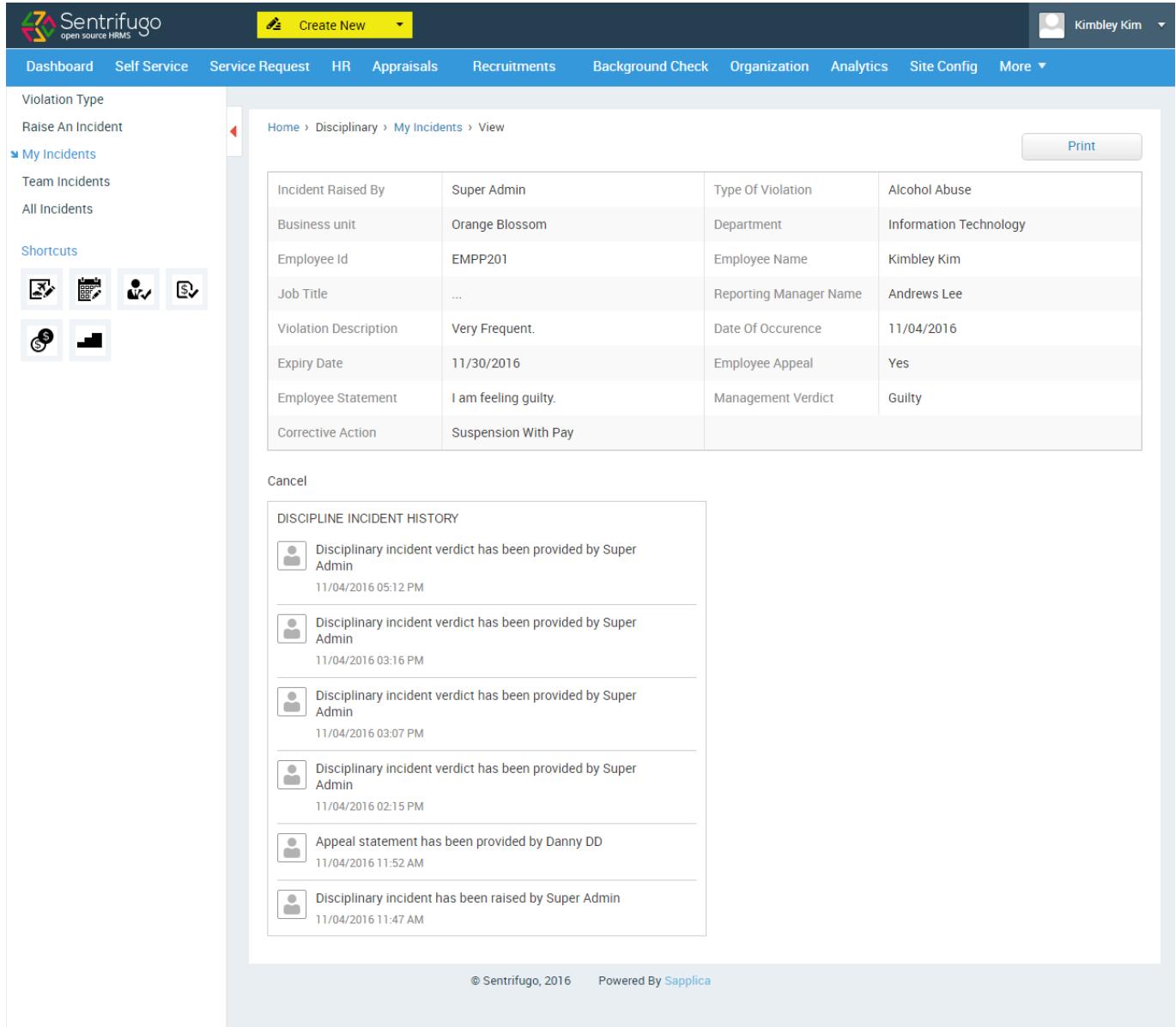
Action	Business Unit	Department	Violation Name	Date Of Occurrence	Verdict
	Orange Blossom	Information Technology	Alcohol Abuse	11/04/2016	Yes Guilty

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, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A user profile for Kimbley Kim is visible on the right. The left sidebar has sections for Violation Type, Raise An Incident, My Incidents (selected), Team Incidents, All Incidents, and Shortcuts (with icons for Home, Create New, Print, and Help).

The main content area shows a breadcrumb path: Home > Disciplinary > My Incidents > View. A table displays the following incident details:

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

Below the table is a 'DISCIPLINE INCIDENT HISTORY' section containing the following entries:

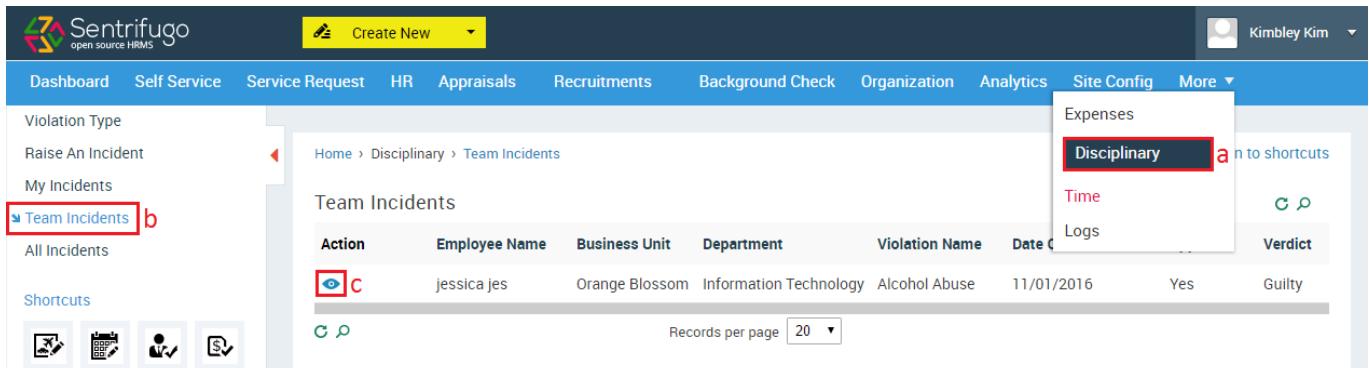
- Disciplinary incident verdict has been provided by Super Admin on 11/04/2016 05:12 PM
- Disciplinary incident verdict has been provided by Super Admin on 11/04/2016 03:16 PM
- Disciplinary incident verdict has been provided by Super Admin on 11/04/2016 03:07 PM
- Disciplinary incident verdict has been 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 257

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

Please refer Figure 258

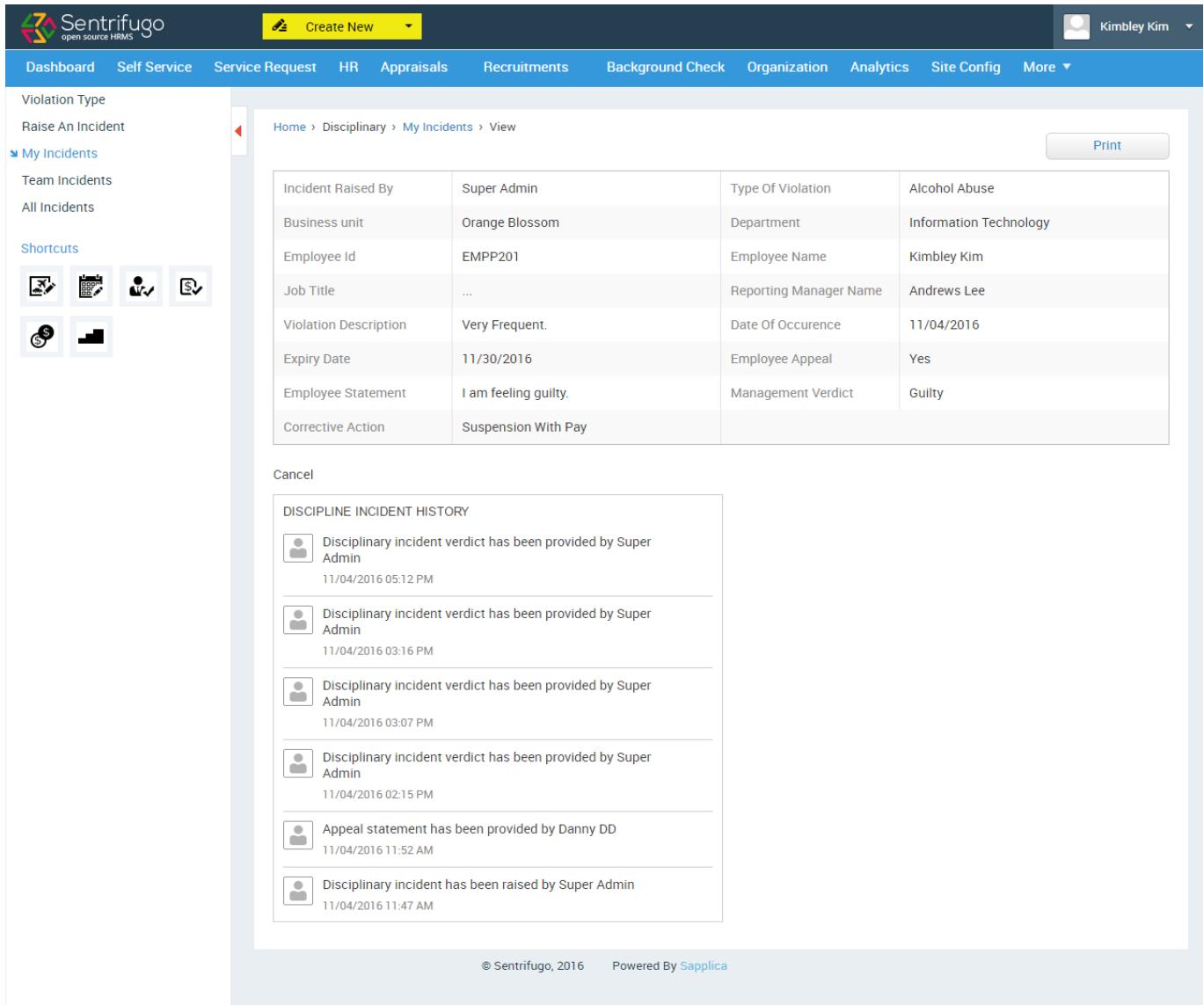


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A dropdown menu under 'More' is open, showing options like Expenses, Disciplinary (which is highlighted in red), Time, Logs, and Verdict. The main content area displays a table titled 'Team Incidents' with columns for Action, Employee Name, Business Unit, Department, Violation Name, Date, and Status. One row is visible, showing an action icon (with a red 'c' box), employee name 'jessica jes', business unit 'Orange Blossom', department 'Information Technology', violation name 'Alcohol Abuse', date '11/01/2016', status 'Yes', and verdict 'Guilty'. Below the table are icons for search, calendar, user, and export.

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

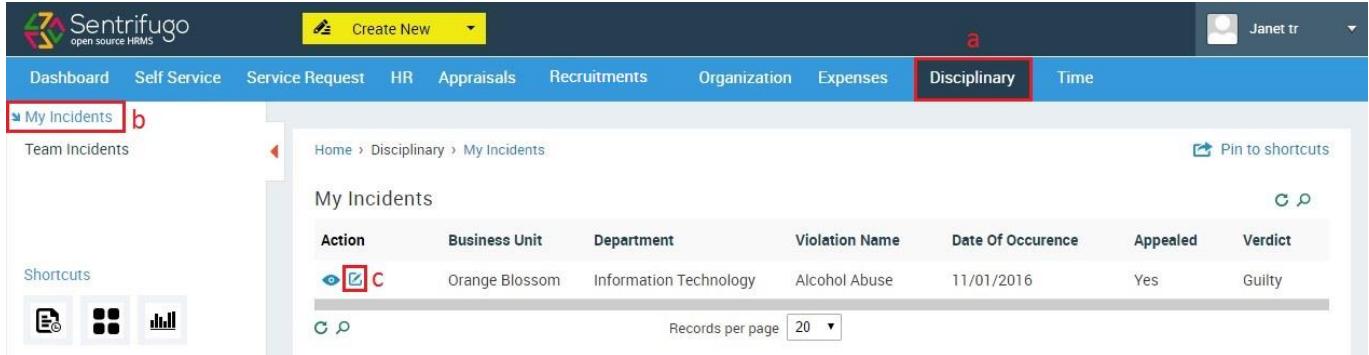


The screenshot shows the 'My Incidents' view for a specific incident. The top navigation bar and left sidebar are identical to Figure 258. The main content area shows a detailed view of the incident with fields for Incident Raised By (Super Admin), Type Of Violation (Alcohol Abuse), Business unit (Orange Blossom), Department (Information Technology), Employee Id (EMPP201), Employee Name (Kimbley Kim), Job Title (...), Reporting Manager Name (Andrews Lee), Violation Description (Very Frequent.), Date Of Occurrence (11/04/2016), Expiry Date (11/30/2016), Employee Appeal (Yes), Employee Statement (I am feeling guilty.), Management Verdict (Guilty), and Corrective Action (Suspension With Pay). Below this, a 'DISCIPLINE INCIDENT HISTORY' section lists several entries, each with a user icon, a message about a disciplinary incident verdict being provided by Super Admin, and a timestamp (e.g., 11/04/2016 05:12 PM, 03:16 PM, 03:07 PM, 02:15 PM). At the bottom, there are copyright and power information: © Sentrifugo, 2016 and Powered By Sapplica.

Figure 259

17.5 How do I provide my appeal statement?

Please refer Figure 260

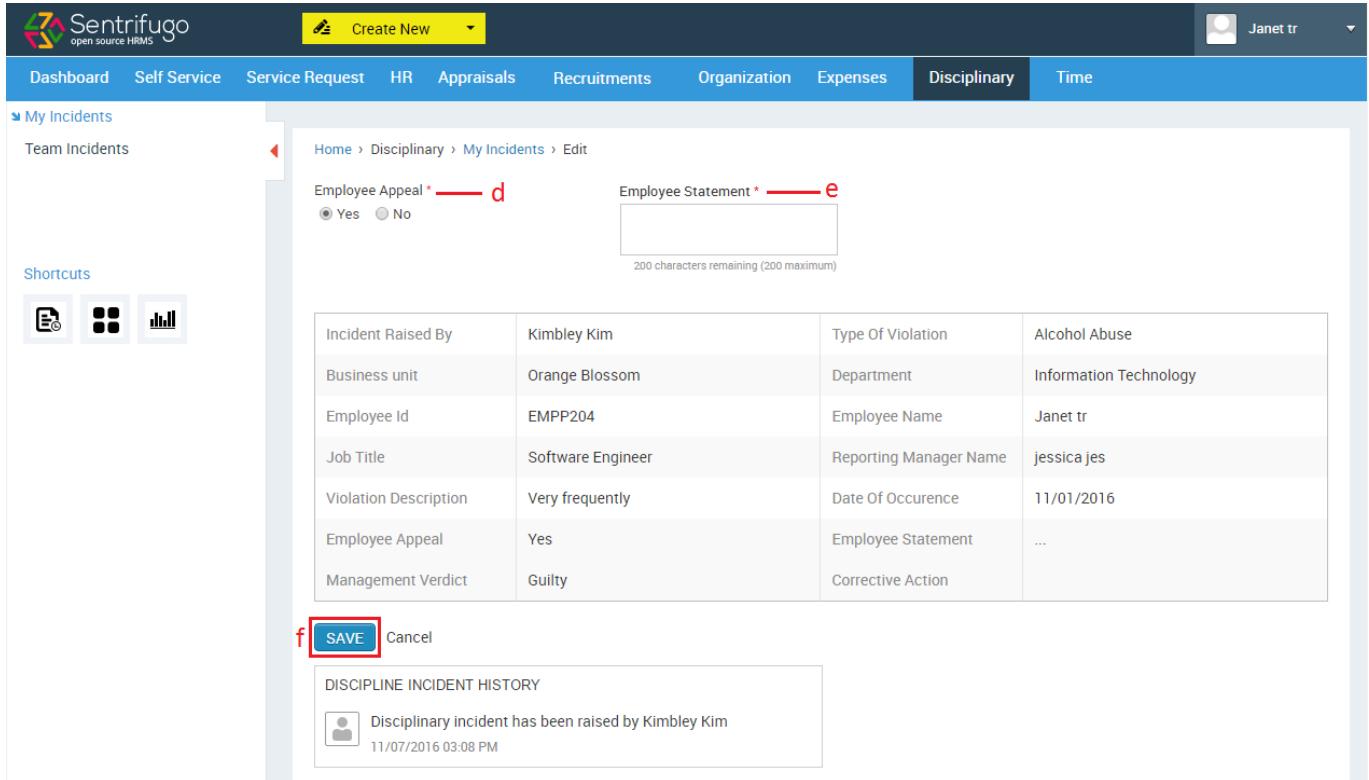


The screenshot shows the Sentrifugo web interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses, **Disciplinary** (which is highlighted with a red box), and Time. The left sidebar has sections for My Incidents (with a red box labeled 'b') and Team Incidents. Under 'Shortcuts' are icons for a list, grid, and chart. The main content area displays a table titled 'My Incidents' with columns: Action, Business Unit, Department, Violation Name, Date Of Occurrence,Appealed, and Verdict. One row is shown: Action (edit icon with a red box labeled 'c'), Business Unit (Orange Blossom), Department (Information Technology), Violation Name (Alcohol Abuse), Date Of Occurrence (11/01/2016),Appealed (Yes), and Verdict (Guilty). Below the table are buttons for 'Records per page' and a dropdown set to 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



The screenshot shows the 'Edit' view for a disciplinary incident. The top navigation bar and sidebar are identical to Figure 260. The main content area shows a form with fields: Employee Appeal * (radio buttons for Yes (selected) and No) (red box labeled 'd'), Employee Statement * (text area) (red box labeled 'e'), and a table with various incident details. At the bottom are 'SAVE' and 'Cancel' buttons (red box labeled 'f'), and a 'DISCIPLINE INCIDENT HISTORY' section showing a log entry: 'Disciplinary incident has been raised by Kimbley Kim' on '11/07/2016 03:08 PM'.

Figure 261

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

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



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

Please refer Figure 262

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

Figure 262

- 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 263

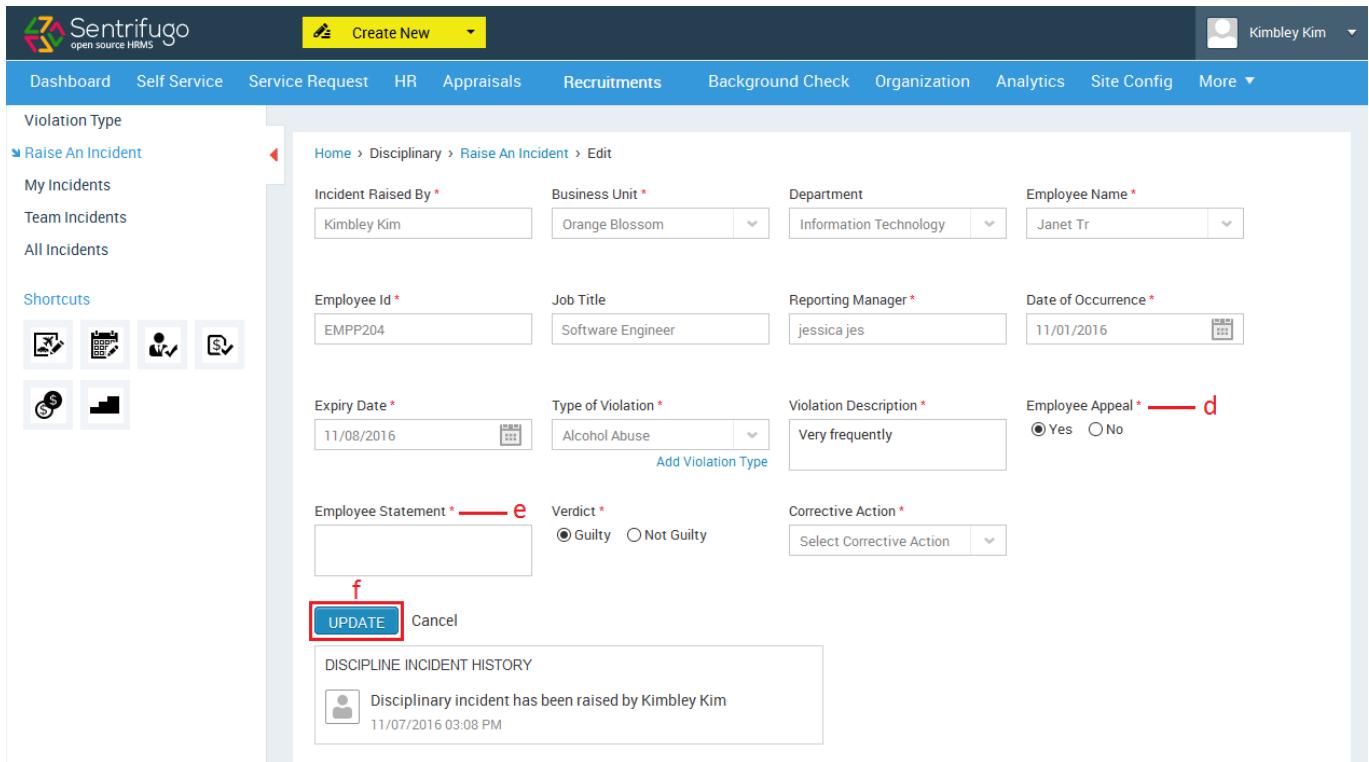


Figure 263

- 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

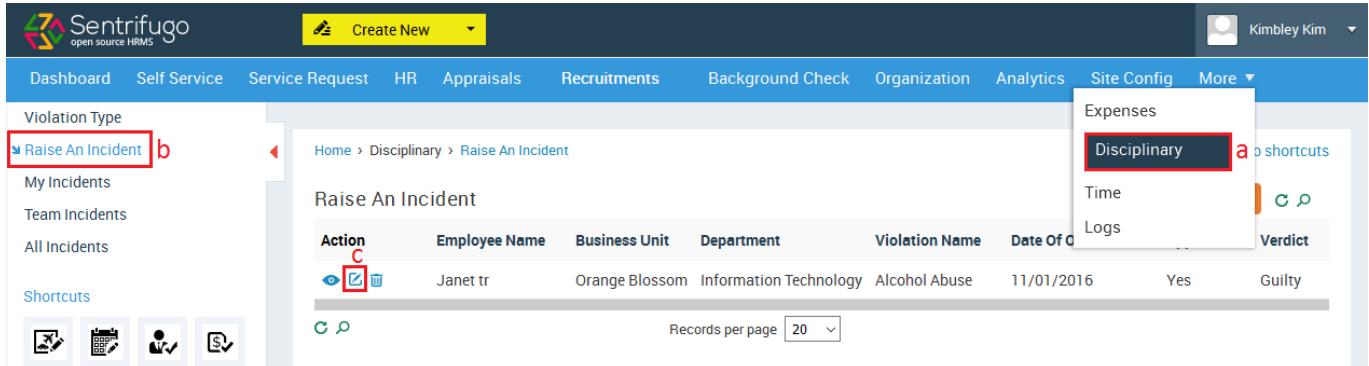
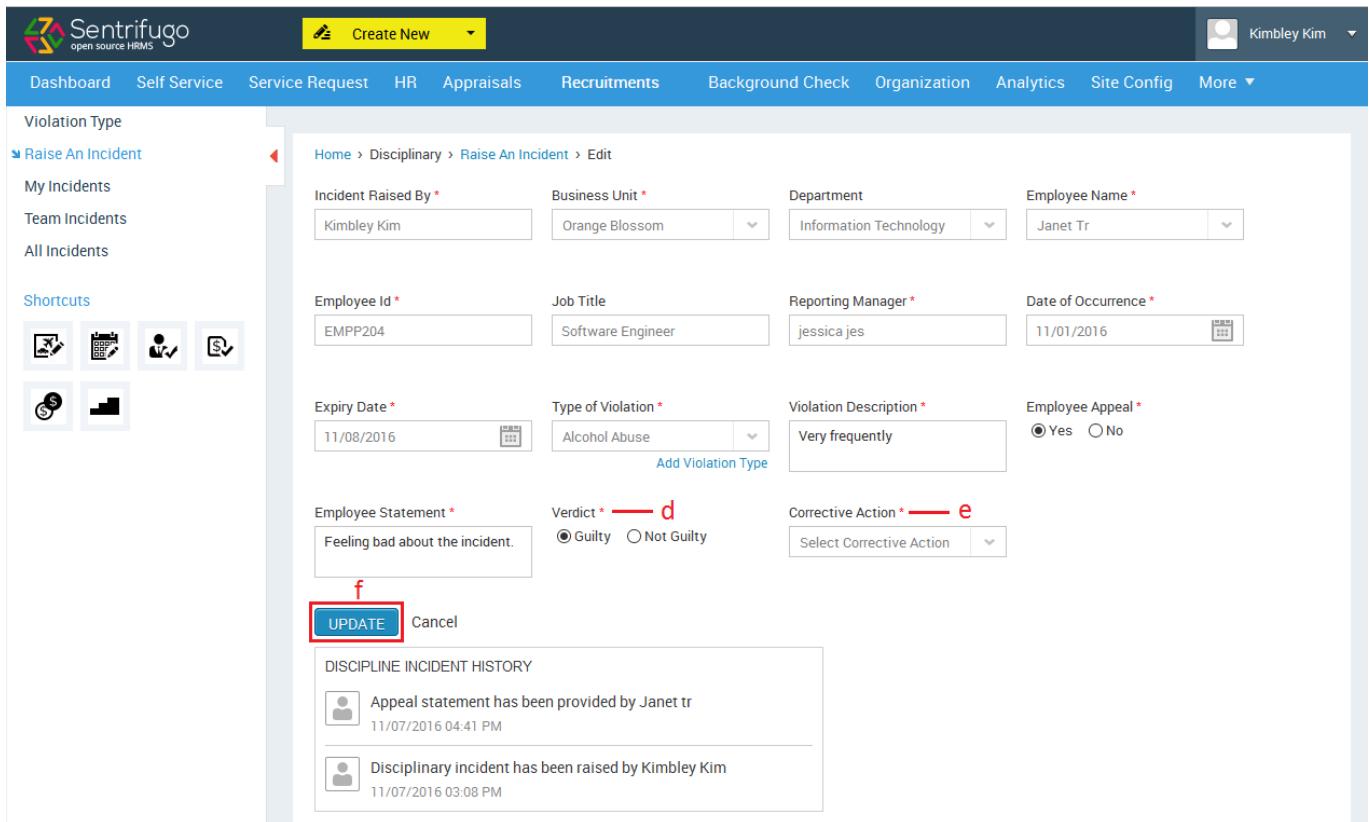


Figure 264

- 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



The screenshot shows the 'Raise An Incident' page under the 'Disciplinary' section. The form fields include:

- Incident Raised By: Kimbley Kim
- Business Unit: Orange Blossom
- Department: Information Technology
- Employee Name: Janet Tr
- Employee Id: EMPP204
- Job Title: Software Engineer
- Reporting Manager: jessica jes
- Date of Occurrence: 11/01/2016
- Expiry Date: 11/08/2016
- Type of Violation: Alcohol Abuse
- Violation Description: Very frequently
- Employee Appeal: Yes (radio button selected)
- Employee Statement: Feeling bad about the incident.
- Verdict: Guilty (radio button selected)
- Corrective Action: Select Corrective Action

At the bottom left is a red box around the 'UPDATE' button. Below the form is a 'DISCIPLINE INCIDENT HISTORY' section showing two entries:

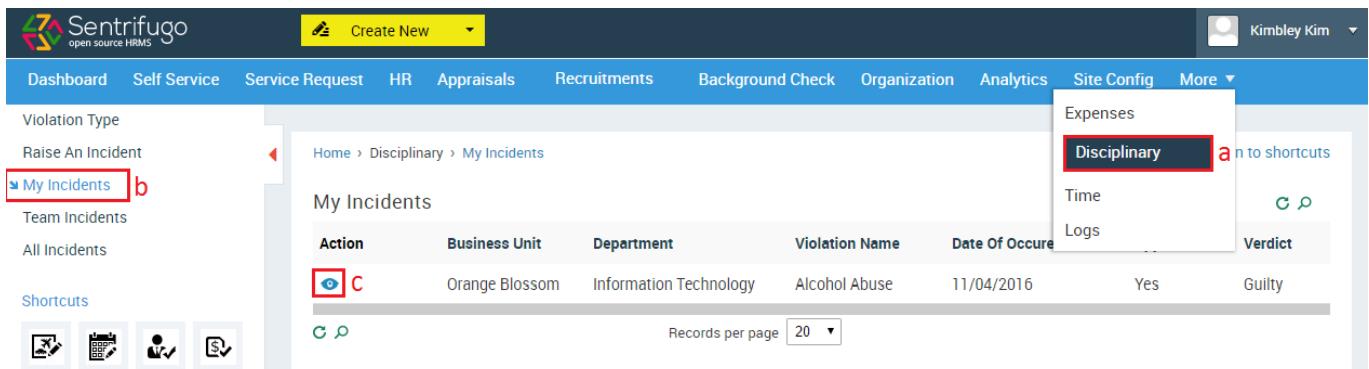
- Appeal statement has been provided by Janet tr 11/07/2016 04:41 PM
- Disciplinary incident has been raised by Kimbley Kim 11/07/2016 03:08 PM

Figure 265

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

17.8 How do I print my disciplinary incident?

Please refer Figure 266



The screenshot shows the 'My Incidents' page under the 'Disciplinary' section. The table displays the following data:

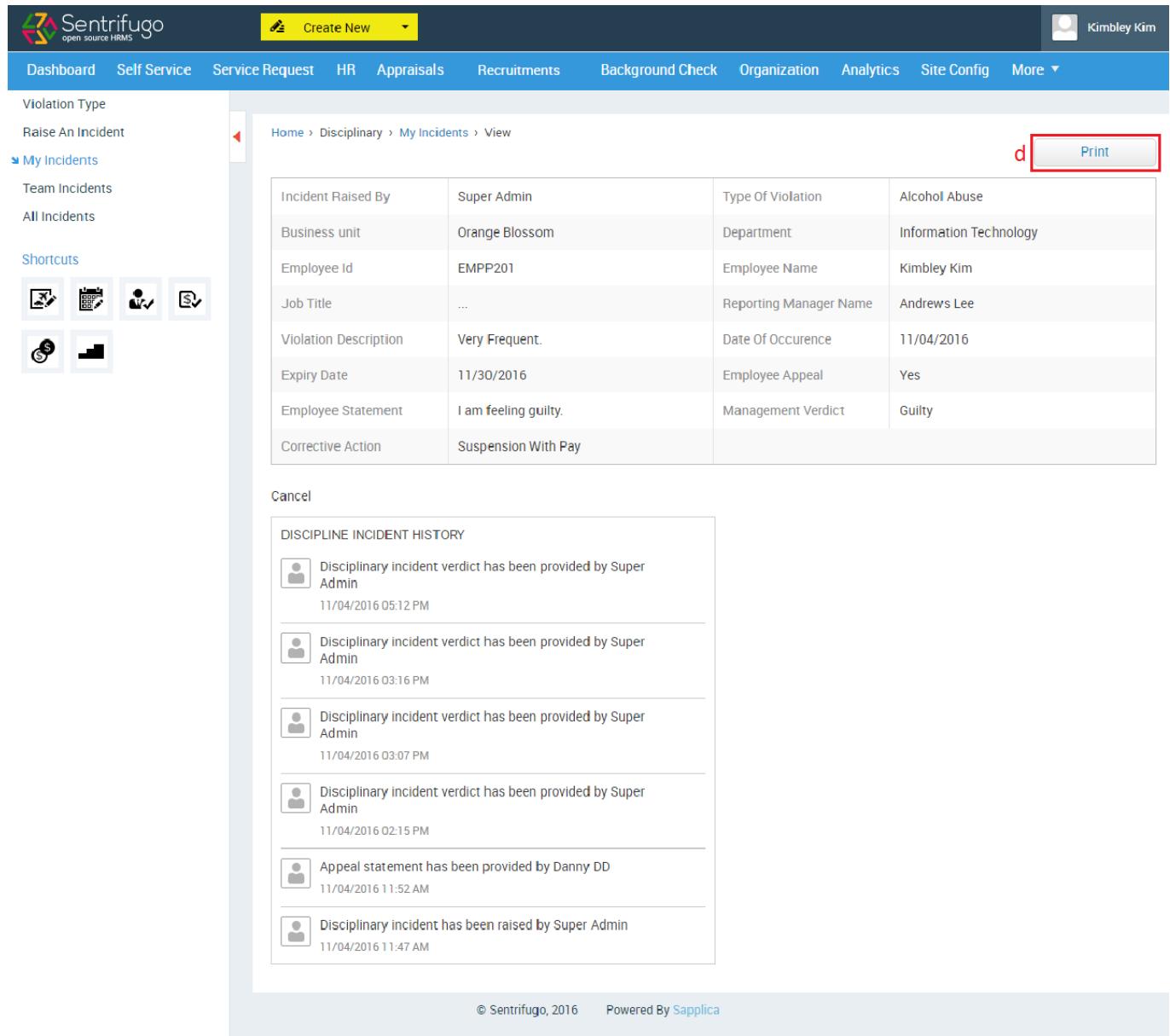
Action	Business Unit	Department	Violation Name	Date Of Occure	Yes	Guilty
	Orange Blossom	Information Technology	Alcohol Abuse	11/04/2016		

At the top right of the table, the 'Disciplinary' menu item is highlighted with a red box. A tooltip 'a n to shortcuts' is visible above it. To the right of the table, there are links for 'Expenses', 'Time', 'Logs', and 'Verdict'. At the bottom left of the table, there are 'C' and 'O' icons. At the bottom right, there is a 'Records per page' dropdown set to 20.

Figure 266

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

Please refer Figure 267



The screenshot shows the Sentrifugo open source HRMS interface. At the top, there's a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the far right, a user profile for 'Kimbley Kim' is shown. Below the navigation bar, a left sidebar contains links for Violation Type, Raise An Incident, My Incidents (which is selected and highlighted with a blue arrow), Team Incidents, All Incidents, and Shortcuts (with icons for employee, calendar, and document).

The main content area displays a 'My Incidents' view for a specific disciplinary incident. The incident details are listed in a table:

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' button is visible. Underneath it, a section titled 'DISCIPLINE INCIDENT HISTORY' lists several 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)

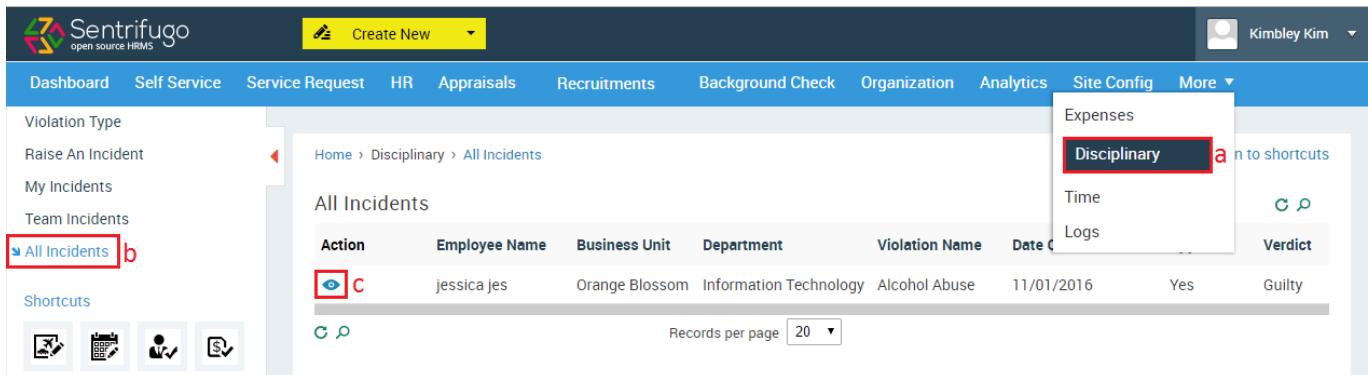
At the bottom of the page, there are copyright and powered-by details: © Sentrifugo, 2016 | Powered By Sapplica.

Figure 267

d. Click **Print** button

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

Please refer Figure 268

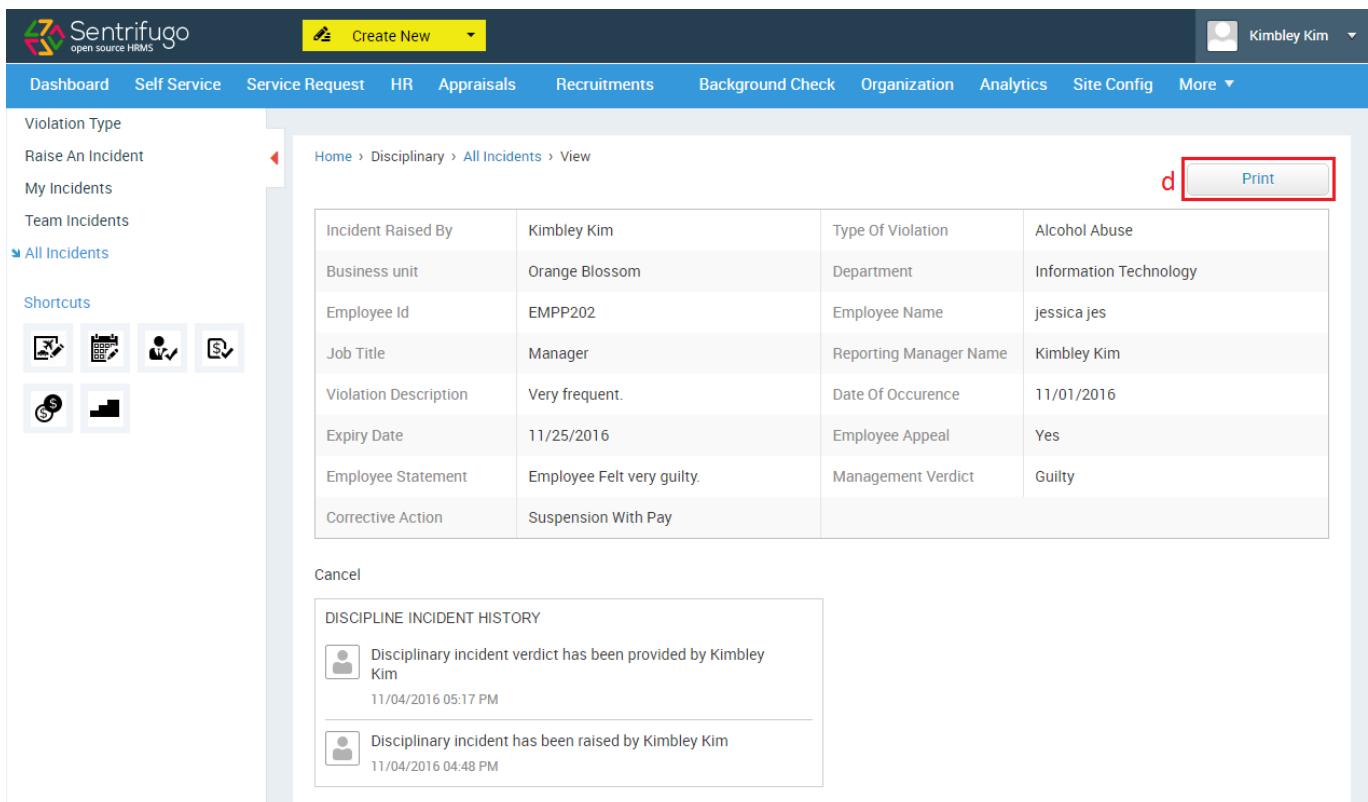


The screenshot shows the Sentrifugo open source HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The 'Disciplinary' link under 'More' is highlighted with a red box 'a'. The left sidebar has links for Violation Type, Raise An Incident, My Incidents, Team Incidents, and 'All Incidents' (which is also highlighted with a red box 'b'). Below the sidebar are several icons for Shortcuts. The main content area displays a grid titled 'All Incidents' with columns for Action, Employee Name, Business Unit, Department, Violation Name, Date Of Occurrence, Employee Appeal, and Management Verdict. One row in the grid is highlighted with a red box 'c'. At the bottom of the grid is a 'Records per page' dropdown set to 20. The top right corner of the page has a 'Print' button highlighted with a red box 'd'.

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 application's Disciplinary module. The top navigation bar and sidebar are identical to Figure 268. The main content area shows a detailed view of a disciplinary incident. The 'Print' button in the top right is highlighted with a red box 'd'. The page contains a table with various details: 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), and Corrective Action (Suspension With Pay). Below the table is a 'DISCIPLINE INCIDENT HISTORY' section with two entries: 'Disciplinary incident verdict has been provided by Kimbley Kim' (11/04/2016 05:17 PM) and 'Disciplinary incident has been raised by Kimbley Kim' (11/04/2016 04:48 PM). A 'Cancel' button is visible at the bottom left.

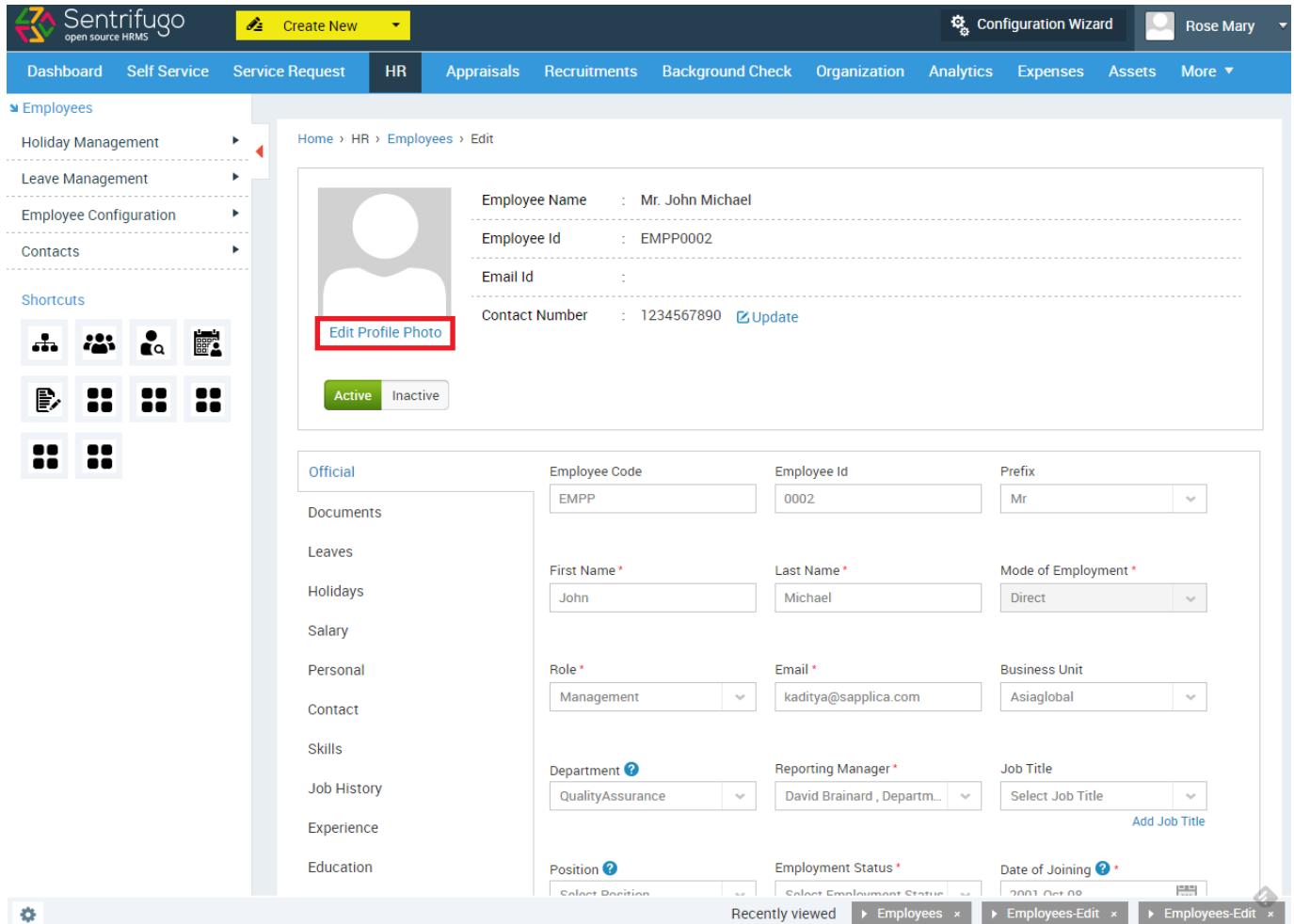
Figure 269

- Click **Print** button

18. Additional Features

Upload Employees' Profile Photo as HR

HR can now upload employees' profile photos.



The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes links for Create New, Configuration Wizard, and user Rose Mary. The main menu has categories like Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Expenses, Assets, and More. On the left, a sidebar for Employees lists options like Holiday Management, Leave Management, Employee Configuration, and Contacts. Shortcuts provide quick access to various features. The main content area displays an employee's profile for Mr. John Michael (Employee Id: EMPP0002). It includes fields for Email Id, Contact Number (1234567890), and status buttons for Active and Inactive. Below this, there are tabs for Official (Employee Code: EMPP, Employee Id: 0002, Prefix: Mr) and Personal details (First Name: John, Last Name: Michael, Mode of Employment: Direct). Further down are sections for Leaves, Holidays, Salary, Personal, Contact, Skills, Job History, Experience, and Education. At the bottom, there are buttons for Select Position, Select Employment Status, and Add Job Title, along with a Date of Joining field set to 2011-01-01. The footer shows a breadcrumb trail: Recently viewed > Employees > Employees-Edit > Employees-Edit.

HR Configuration Wizard

The configuration wizard has been designed to aid the user in setting up the application in the right manner and to avoid the confusion regarding how to proceed further after a certain step.

It consists of 3 steps:

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

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

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

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

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

Configure Employee Leave Types

Leave Type *
Number of Days *

 [ADD LEAVE TYPE](#)

SAVE

Next >

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

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

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

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

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

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

Configure Holidays

Holiday Group * [Select Holiday Group](#) | [▼](#)
[Add Holiday Group](#)

Holiday * Date ? * [Calendar](#)

 [ADD HOLIDAY](#)

SAVE

< Prev **Next >**

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

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

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

 Configure Leave Types	 Completed
Configure the leave types used in your organization.	
 Configure Holidays	 Completed
Configure the holidays used in your organization.	
 Appraisals	 In Progress (3)
Configure the performance appraisal parameters used in your organization.	

Configure Performance Appraisal

[ADD EMPLOYEE](#)

Appraisal Parameter *

Select Parameter | ▾

Add Parameter

Question *

Description
200 characters remaining (200 maximum)

[ADD QUESTION](#)

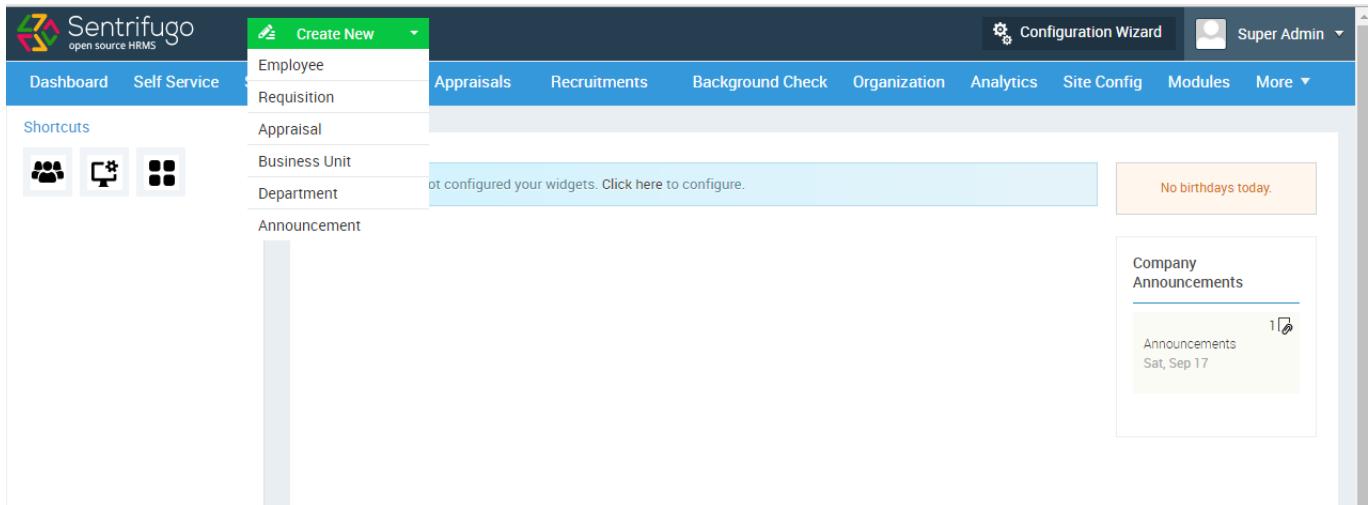
[SAVE](#)

[◀ Prev](#)

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

Create New Shortcut Button

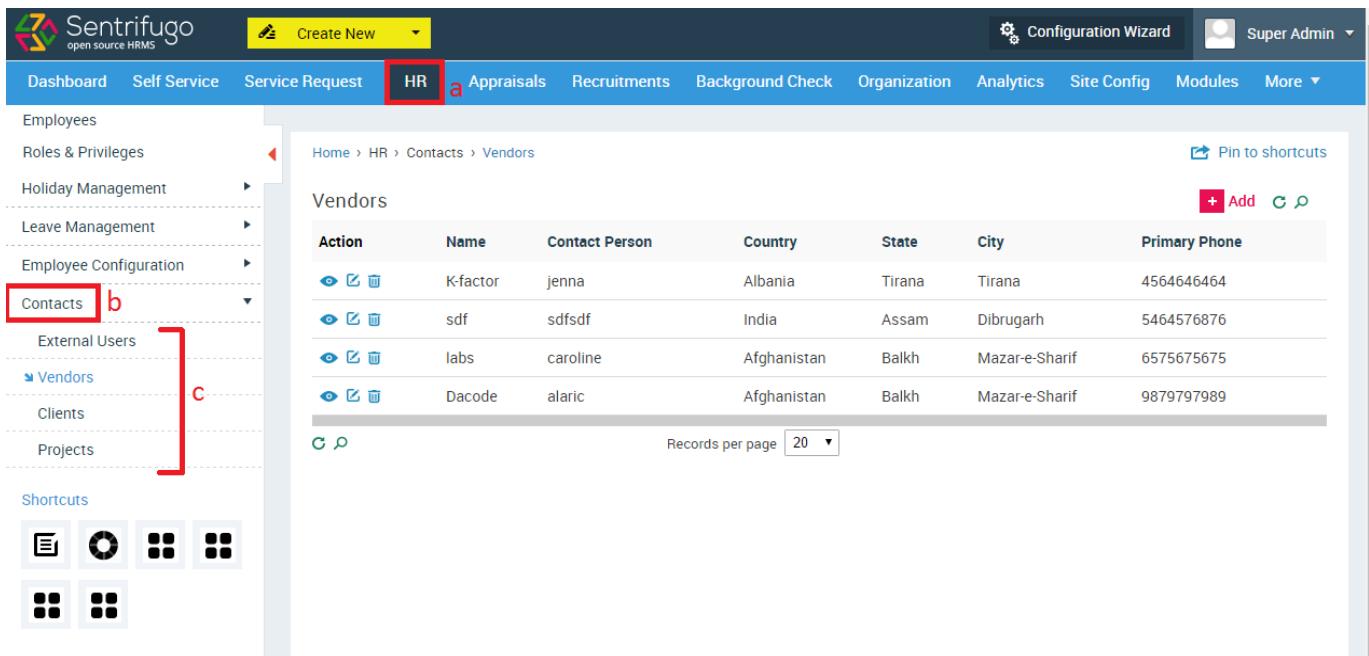
This shortcut button is placed on the top left corner (beside your organization logo) of the application. This button has been designed to save your time from menu redirections. The number of options displayed depends on a user's role privileges. For example, if you belong to the Management role group,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



The screenshot shows the Sentrifugo open source HRMS dashboard. At the top, there's a navigation bar with the Sentrifugo logo, a "Create New" button, a "Configuration Wizard" link, and a "Super Admin" dropdown. Below the navigation bar is a blue header bar with links for "Appraisals", "Recruitments", "Background Check", "Organization", "Analytics", "Site Config", "Modules", and "More". On the left side, there's a sidebar titled "Shortcuts" with icons for users, self-service, and more. A vertical menu on the far left has options like "Employee", "Requisition", "Appraisal", "Business Unit", "Department", and "Announcement". A message box says "You haven't configured your widgets. Click here to configure." In the bottom right corner, there's a box stating "No birthdays today." and another box for "Company Announcements" with one item listed.

Contacts

You can now manage and store your organization's external users, vendors, and clients' details all in one place.



The screenshot shows the "HR" module of the Sentrifugo system. The top navigation bar includes "Create New", "Configuration Wizard", and "Super Admin". Below it is a blue header bar with links for "Appraisals", "Recruitments", "Background Check", "Organization", "Analytics", "Site Config", "Modules", and "More". The left sidebar has sections for "Employees", "Roles & Privileges", "Holiday Management", "Leave Management", "Employee Configuration", "Contacts" (which is highlighted with a red box and labeled 'b'), "External Users", "Vendors" (which is highlighted with a red box and labeled 'c'), "Clients", and "Projects". The main content area shows a breadcrumb path "Home > HR > Contacts > Vendors". It features a table with columns for Action, Name, Contact Person, Country, State, City, and Primary Phone. The table lists four entries: K-factor (jenna, Albania, Tirana, Tirana, 4564646464), sdf (sdfsdf, India, Assam, Dibrugarh, 5464576876), labs (caroline, Afghanistan, Balkh, Mazar-e-Sharif, 6575675675), and Dacode (alaric, Afghanistan, Balkh, Mazar-e-Sharif, 9879797989). There are also "Add" and "Search" buttons at the top right of the table. A red bracket on the left sidebar groups "Contacts" and "Vendors".

- Click **HR** in the top menu
- Click **Contacts** on the left menu panel
- You can click on any contact to add/view External Users/Vendors/Clients