Sentrifugo
User Guide

Table of Content

Getting Started

What is Configuration Wizard

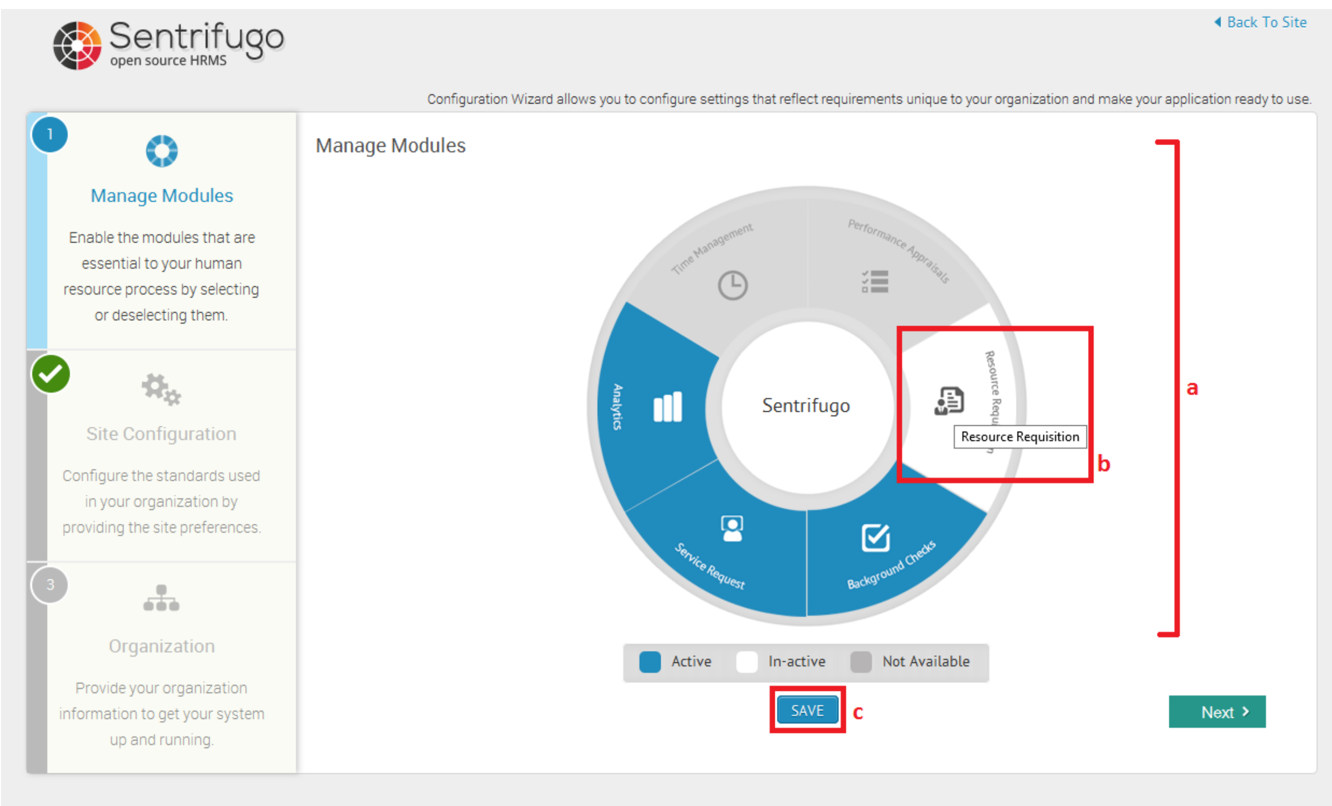
Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use. Wizard is the first screen that is displayed if you have logged into the application for the very first time. Wizard enables you to enter the essential information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

How do I go about the Configuration Wizard

Information is gathered in three sections. The first is the Manage Module section.

a. All the modules are displayed in circular representation
b. Click on the module icon to make it activate or inactive
c. Click on Save to save the changes made.

For further understanding, refer Figure 1

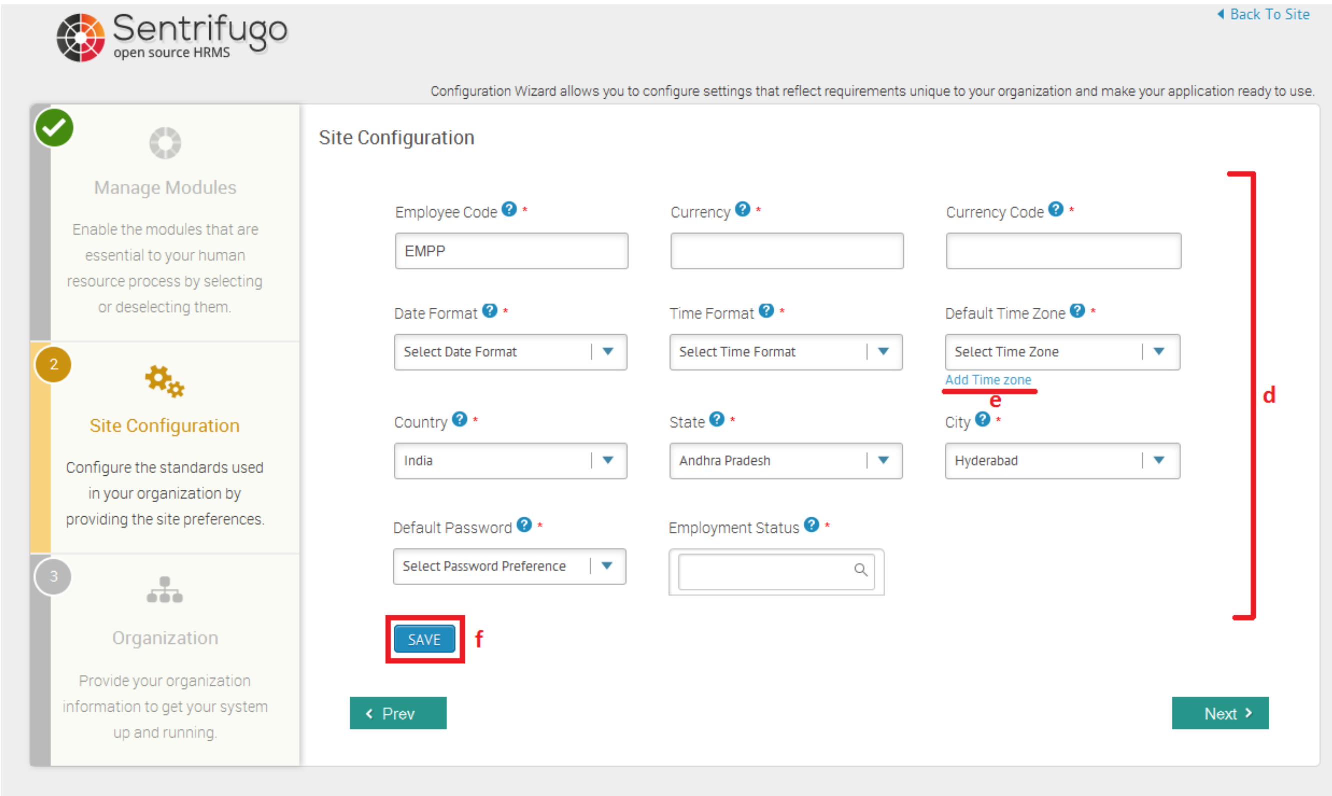


Refer Figure 1

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

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

For further understanding, refer Figure 2



Refer Figure 2

In the Organization section, provide organization information

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

For further understanding, refer Figure 3

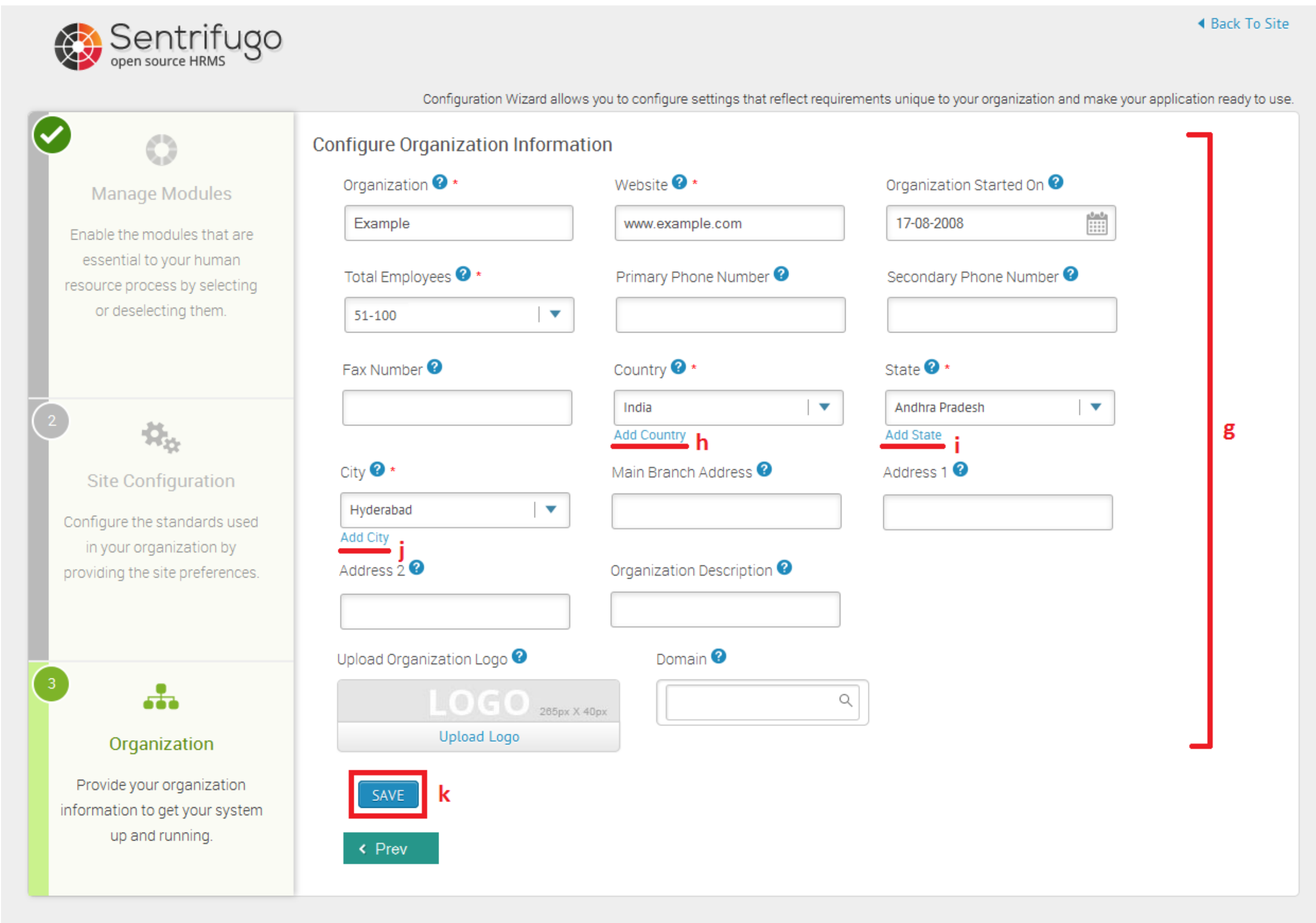


Figure 3

How to Set Site Configurations within the Application:

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

For further understanding, refer Figure 4, which explains about adding Ethnic Codes

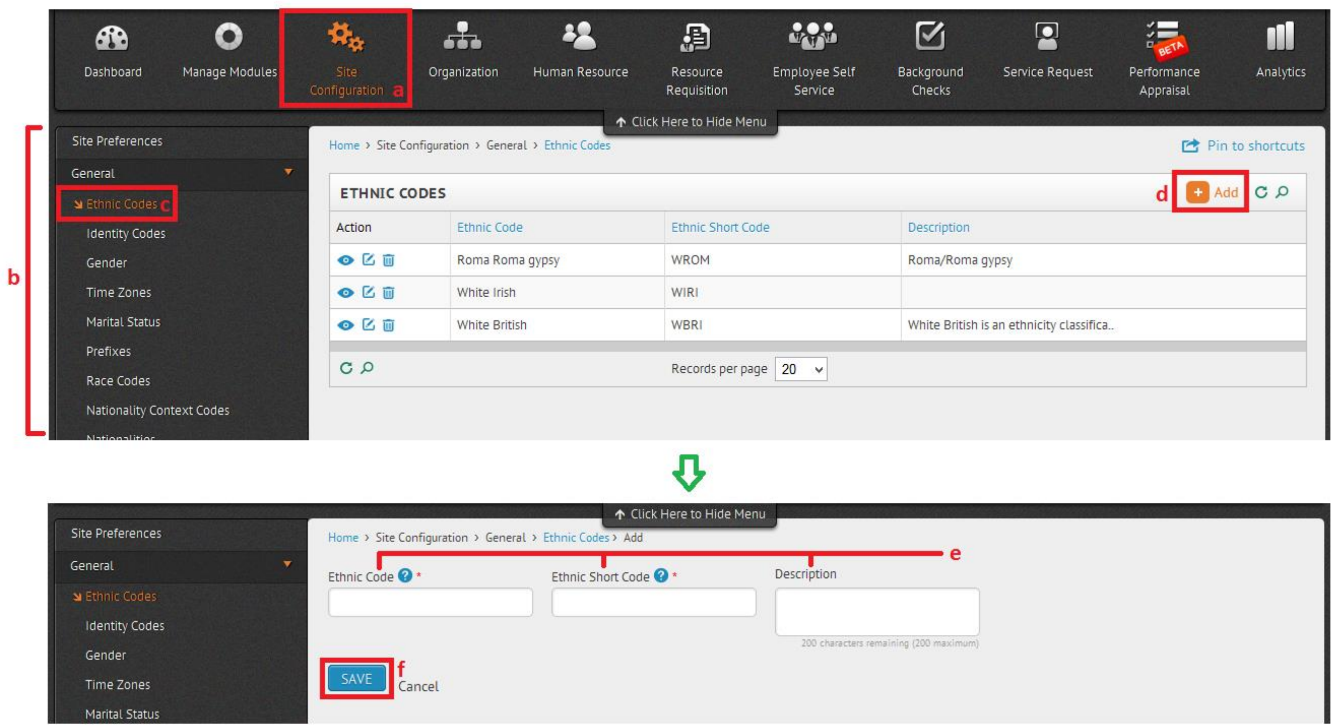


Figure 4

How to Edit Site Configurations within the Application:

a. Click on Site Configurations in the top menu
b. The left side panel will display the submenus
c. Click on the desired submenu
d. Click on the Edit icon for the record that is to be edited on the right side panel
e. Make the required changes to the record
f. Click on Update button to save the changes

For further understanding, refer Figure 5, which explains about editing Ethnic Codes

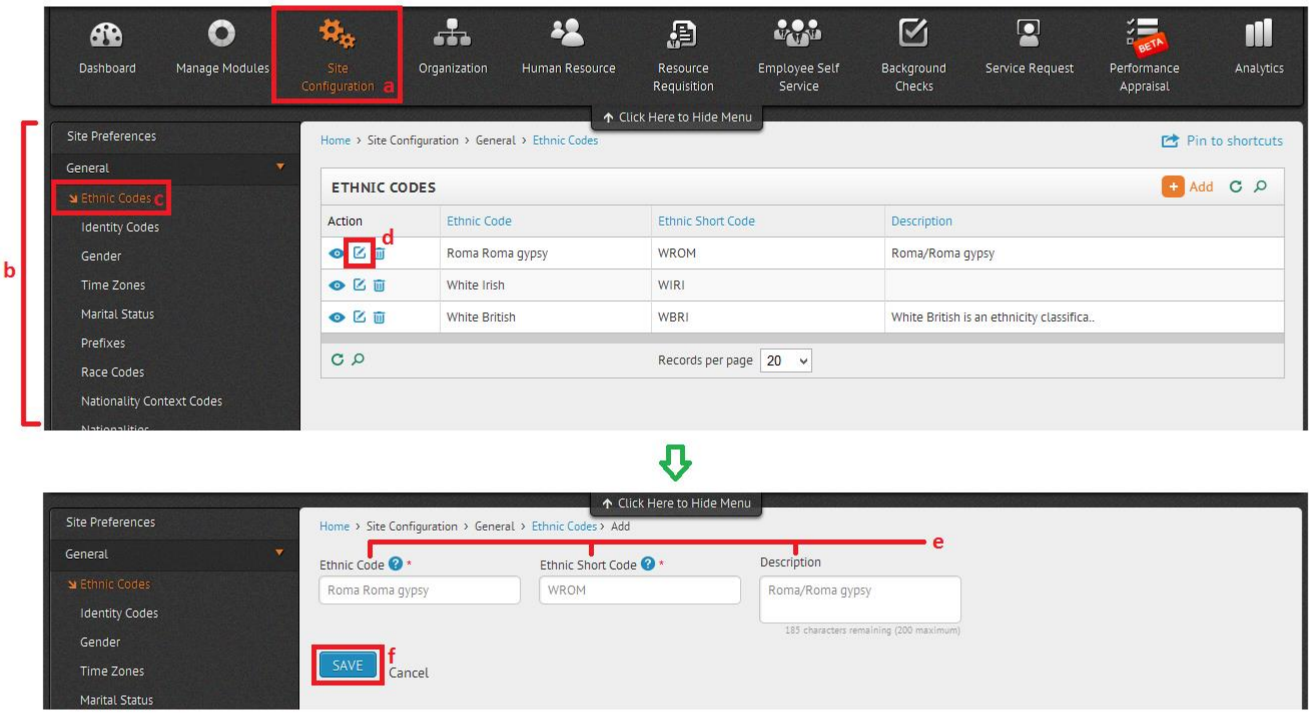


Figure 5

Need to Delete Site Configurations within the Application:

a. Click on Site Configurations in the top menu
b. The left side panel will display the submenus
c. Click on the desired submenu
d. Click on Delete icon for the record that is to be deleted in the right side panel

For further understanding, refer Figure 6, which explains about deleting Ethnic Codes

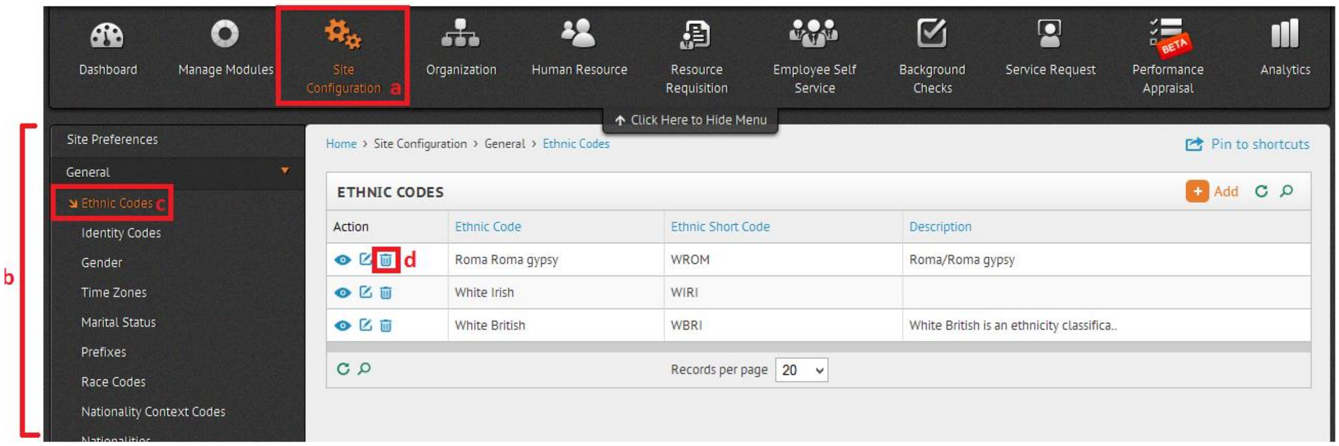


Figure 6

e. In the confirmation popup, click on Yes to delete the record

Refer Figure 7

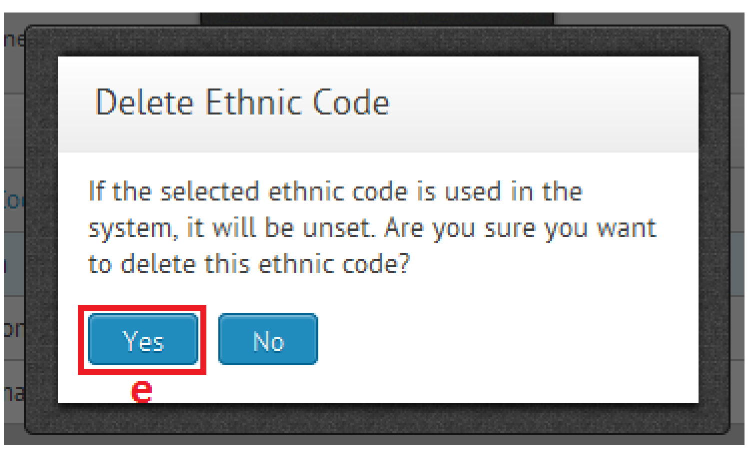


Figure 7

To Set Employee Configurations:

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

For further understanding, refer Figure 8, which explains about adding Pay Frequency

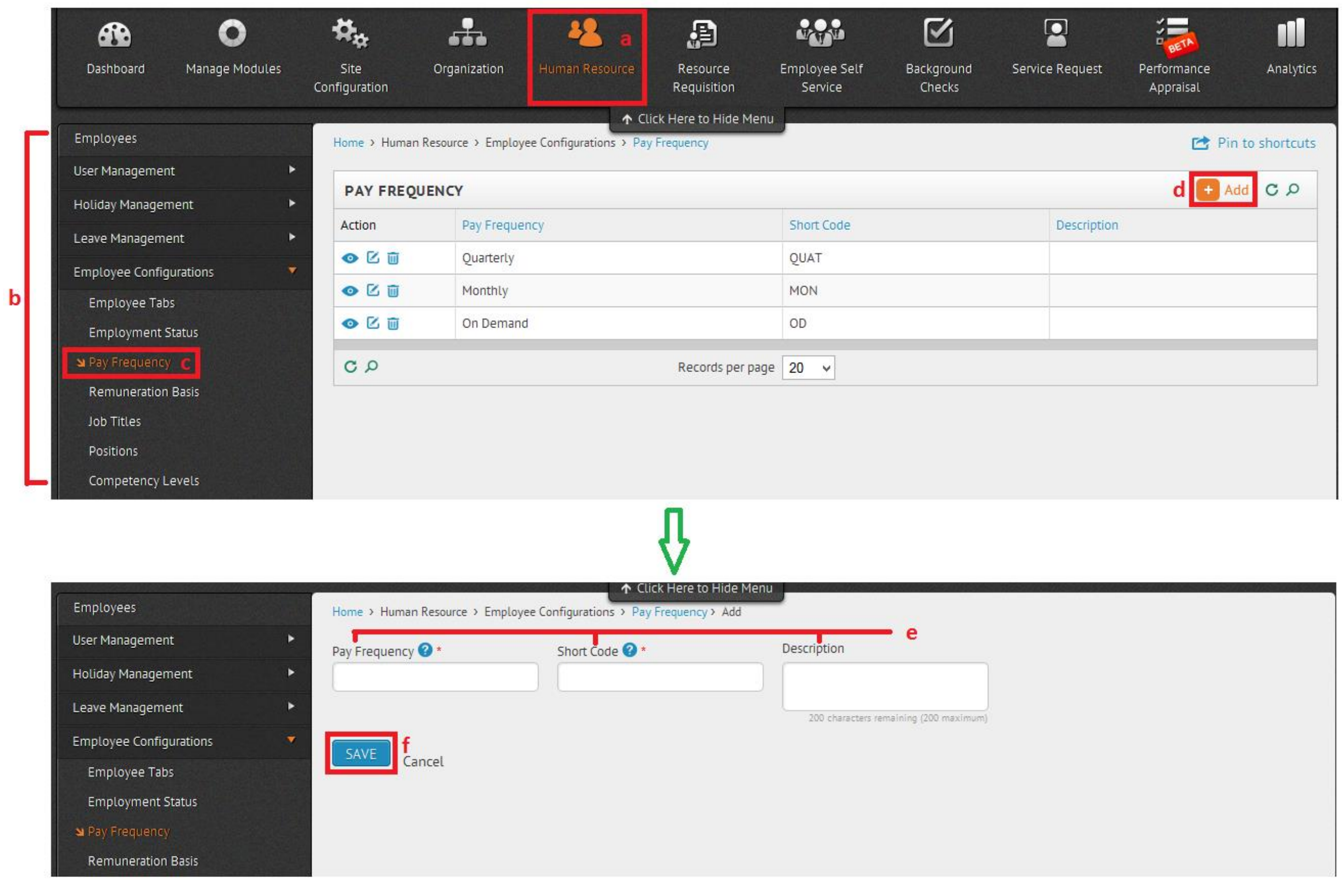


Figure 8

To Edit an Employee Configuration:

a. Click on Human Resource in the top menu
b. The left side panel will display the submenus
c. Click on the desired submenu
d. Click on Edit icon for the record that is to be edited on the right side panel
e. Make the required changes
f. Click on Update button to save the changes

For further understanding, refer Figure 9, which explains about editing Pay Frequency

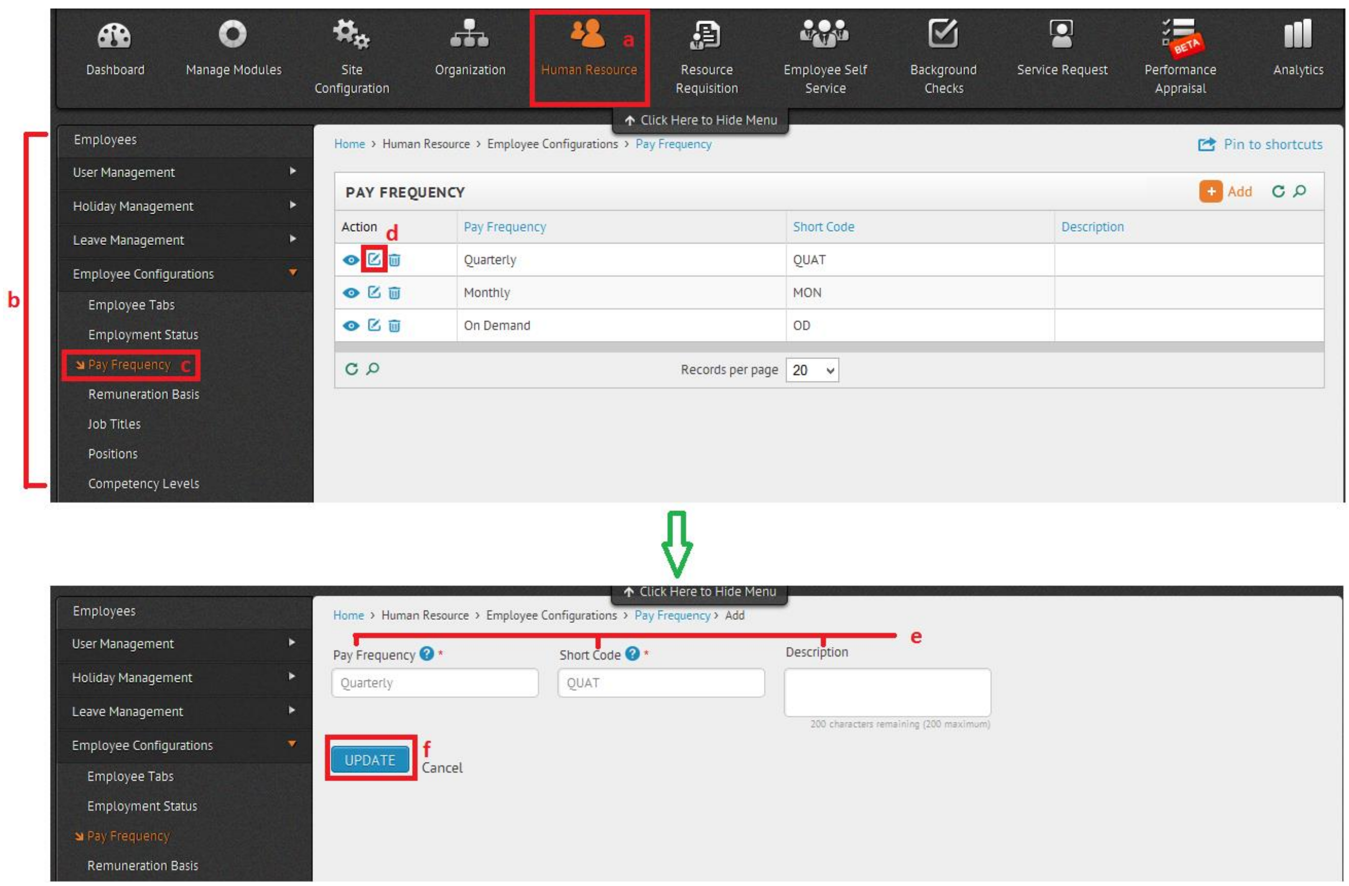


Figure 9

To Delete an Employee Configuration:

a. Click on Human Resource in the top menu
b. The left side panel will display the submenus
c. Click on the desired submenu
d. Click on Delete icon for the record that is to be deleted on the right side panel

For further understanding, refer Figure 10, which explains about deleting Pay Frequency

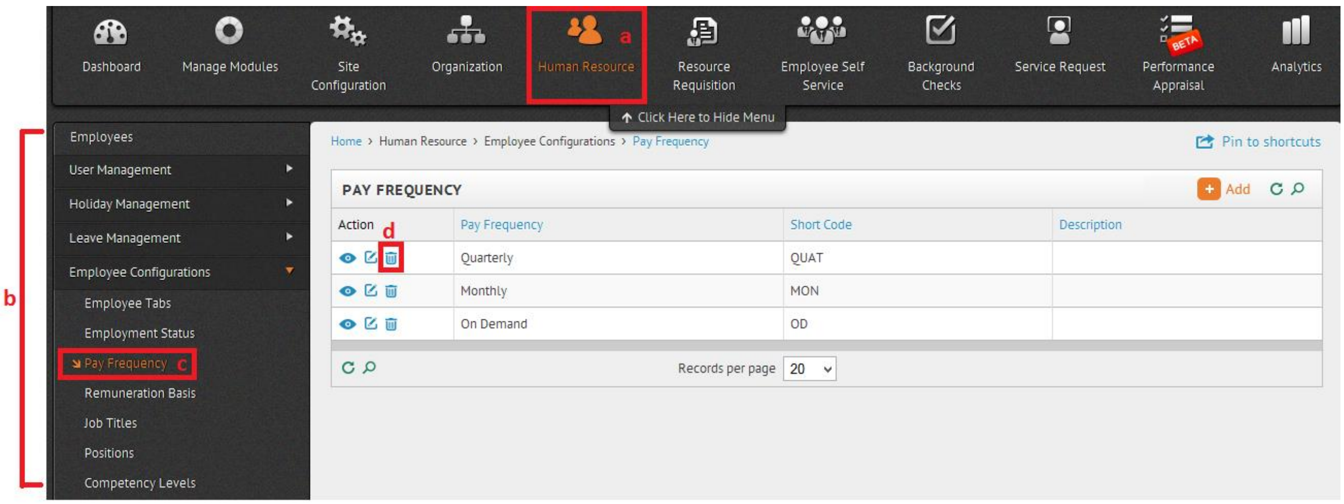


Figure 10

e. In the confirmation popup, click on Yes to delete the record

Refer Figure 11

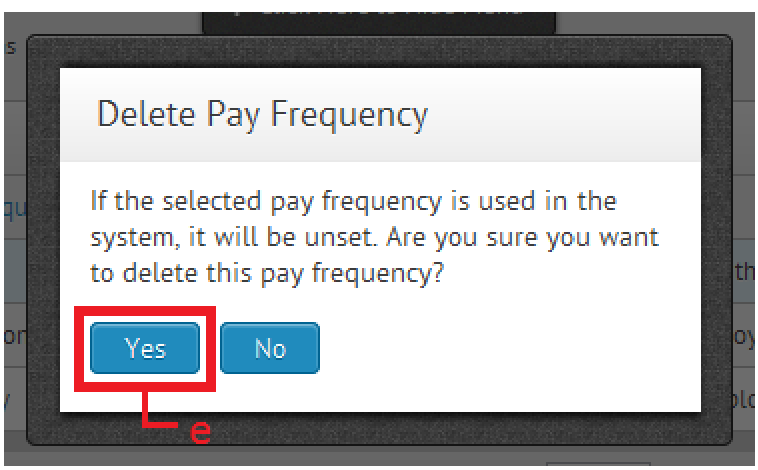


Figure 11

Want to Configure Tabs for Employees:

a. Click on Human Resource in the top menu
b. The left side panel will display the submenus
c. Click on Employee Tabs
d. Click on Edit button to configure tabs for employees

Refer Figure 12

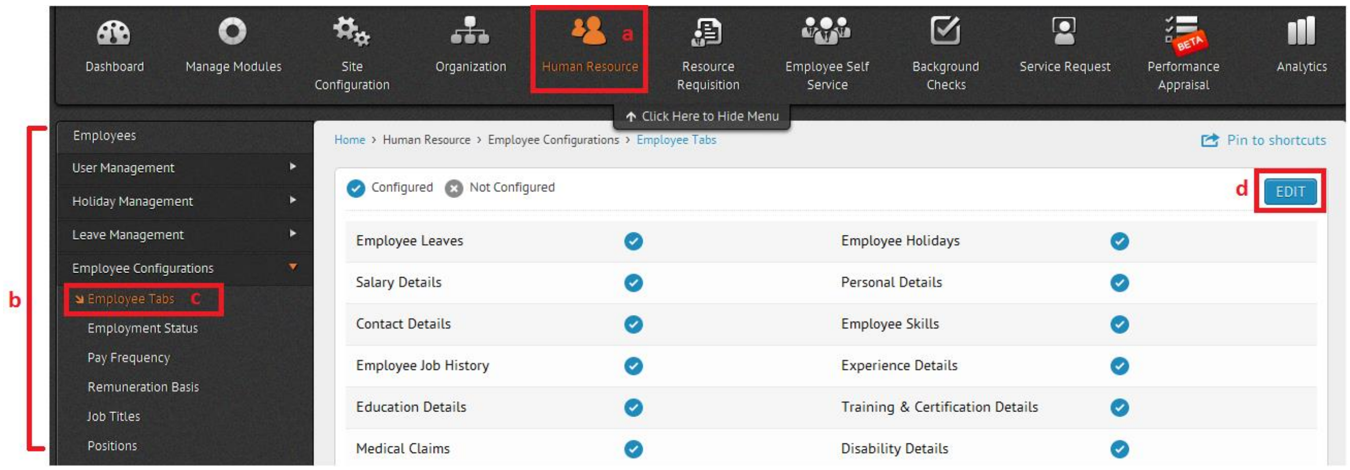


Figure 12

e. To enable specific tabs for employees, check individual checkboxes with respect to desired tabs
f. To enable all the tabs for employees, check "Check All" checkbox
g. Click on Save to save the changes

Refer Figure 13

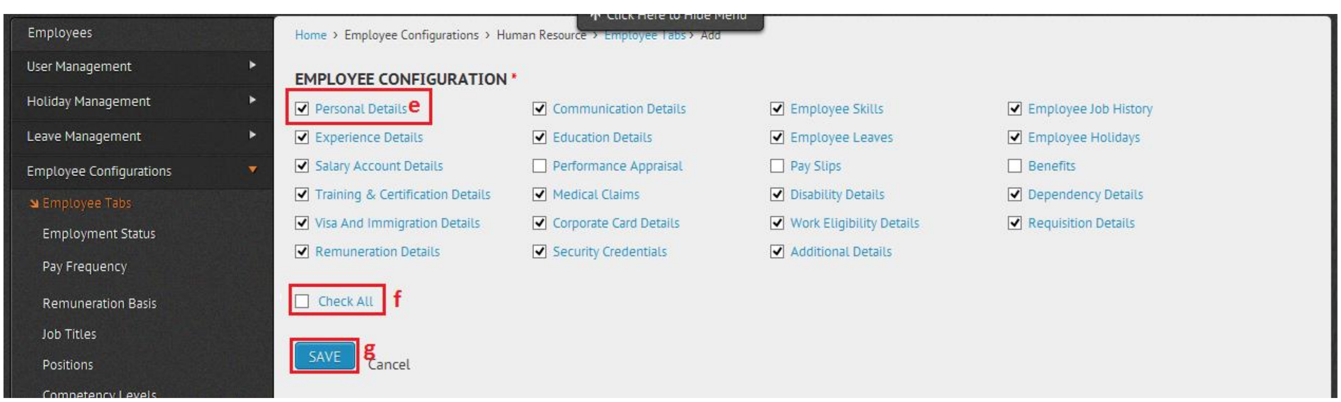


Figure 13

Do You Want to Add an Organization:

a. Click on Organization in the top menu
b. The left side panel will display the submenus
c. Click on Organization Info
d. Click on Click Here link in the right side panel

Refer Figure 14

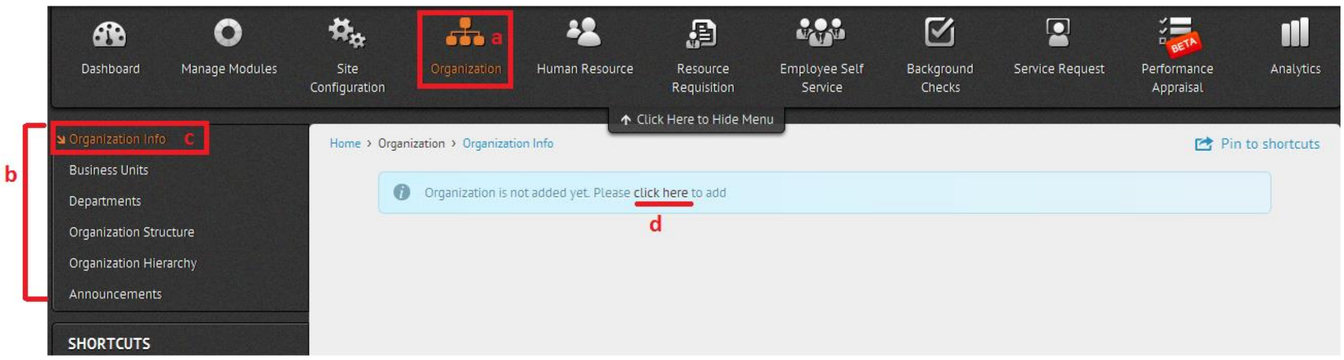


Figure 14

e. Enter the required details
f. Upload your organization logo
g. Click on Save to add the organization

Refer Figure 15

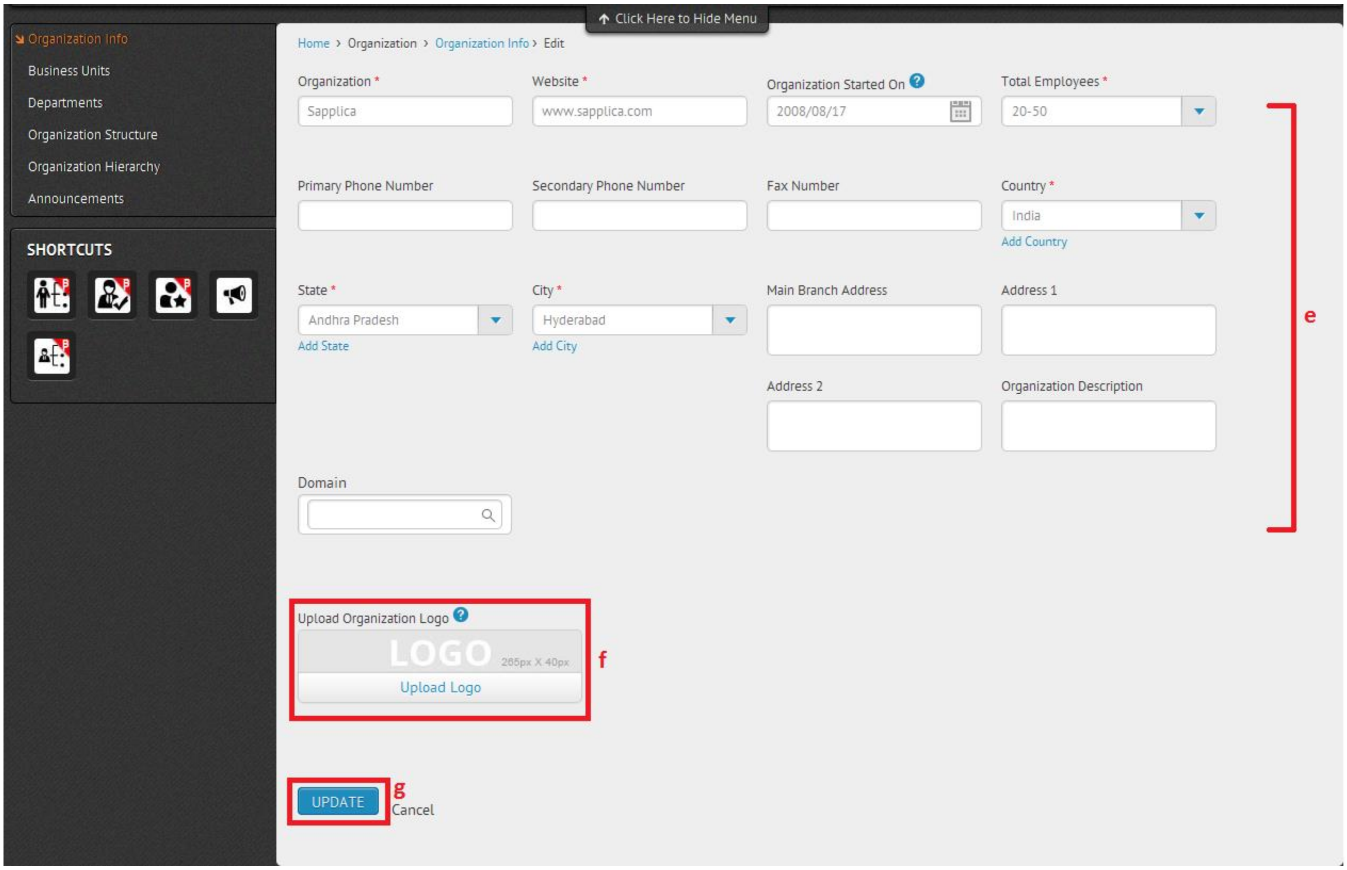


Figure 15

How to Add Business Units:

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

Refer Figure 16

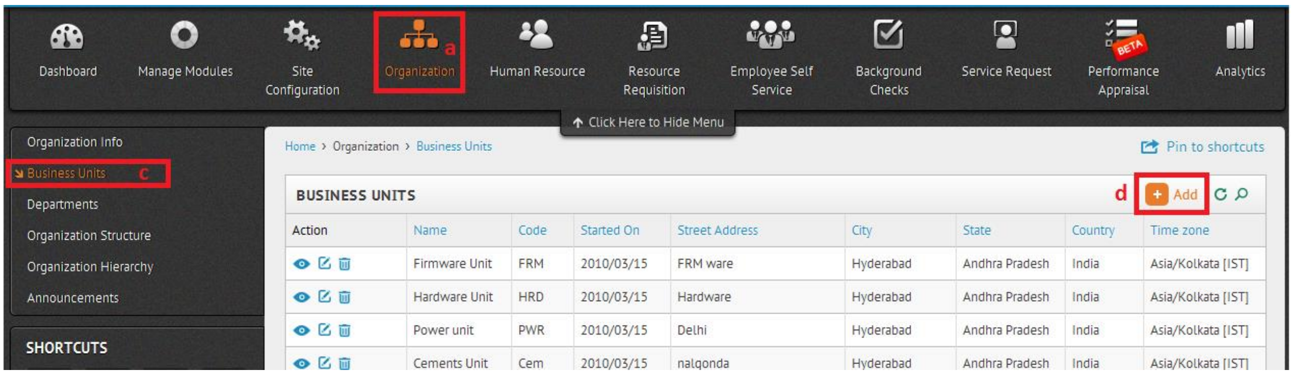


Figure 16

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

Refer Figure 17

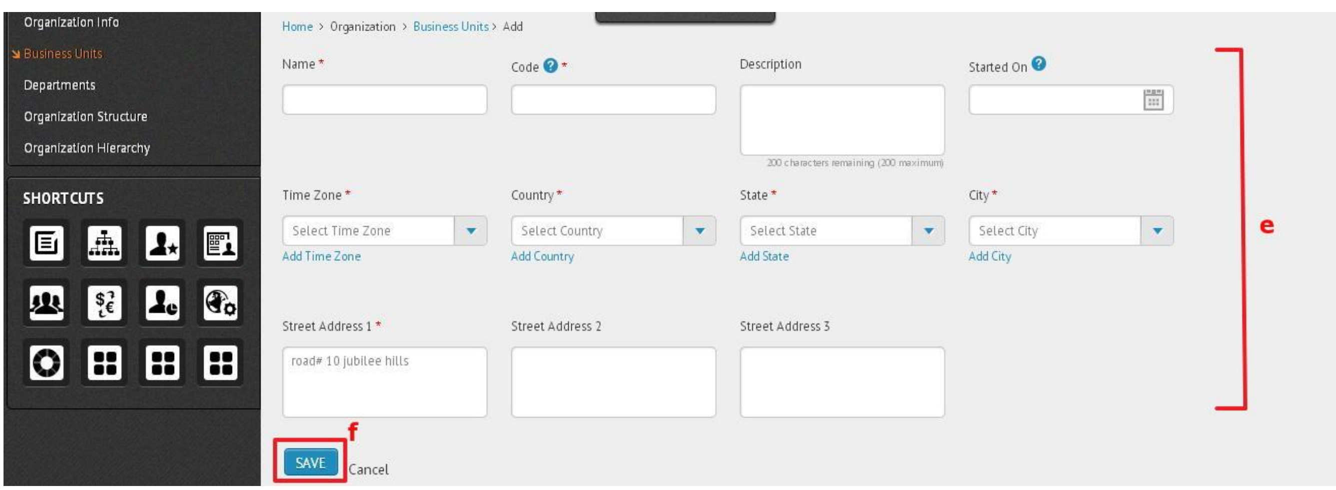


Figure 17

Steps to Add Departments:

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

Refer Figure 18

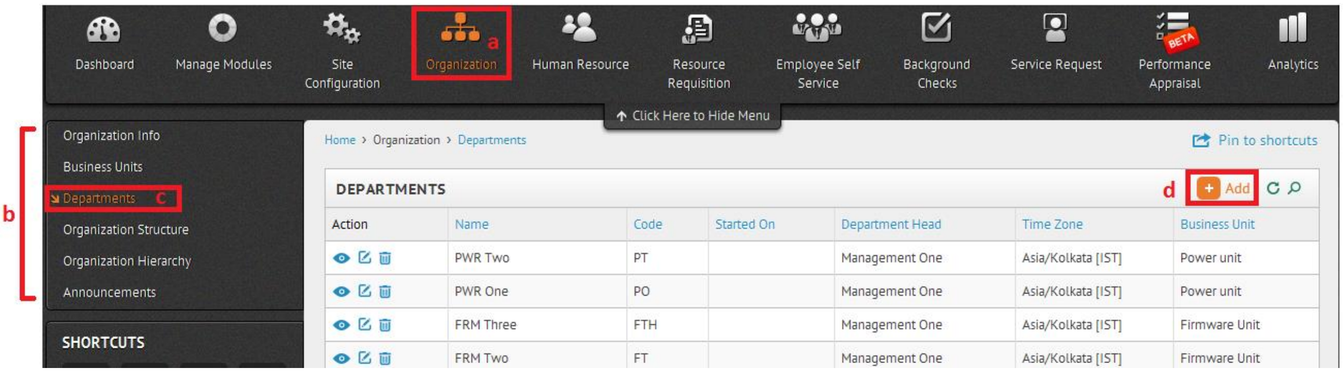


Figure 18

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

Refer Figure 19

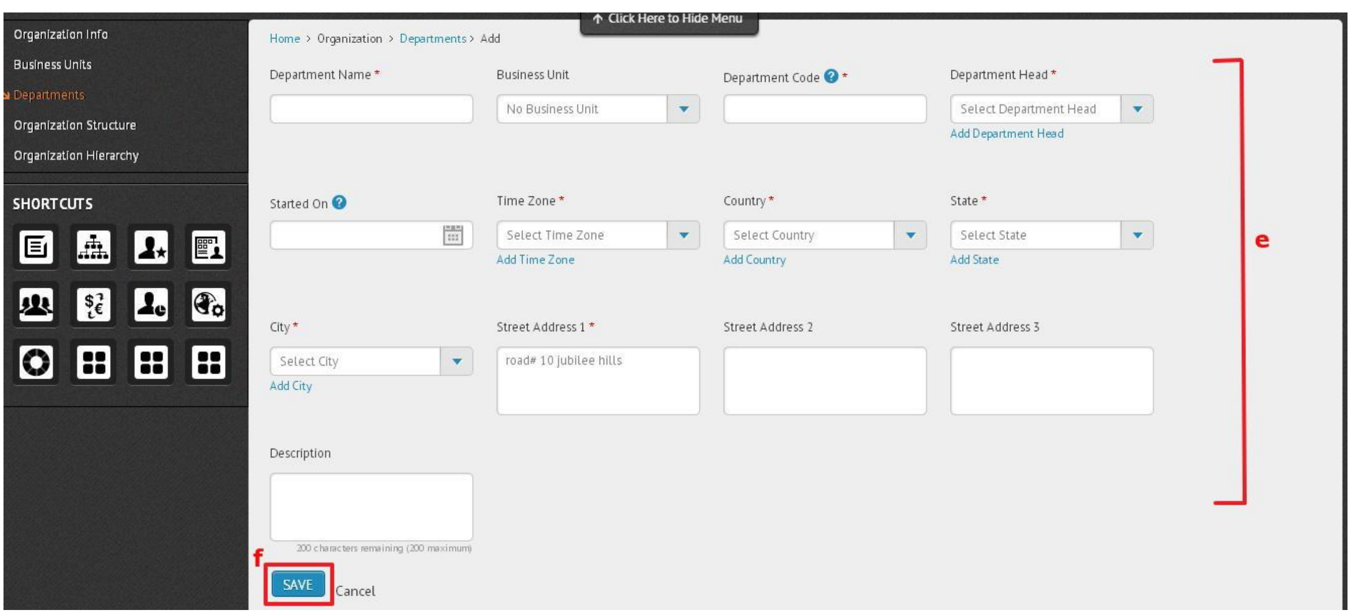


Figure 19

How do I Set Site Preferences:

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

Refer Figure 20

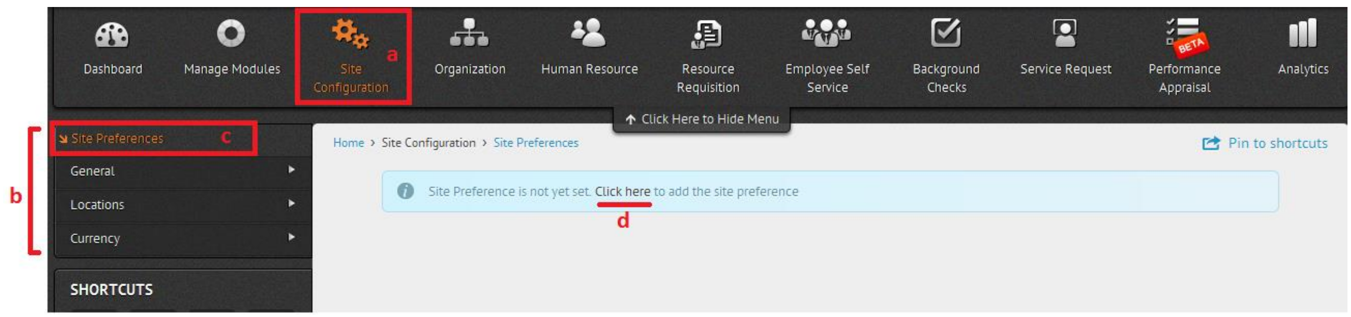


Figure 20

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

Refer Figure 21

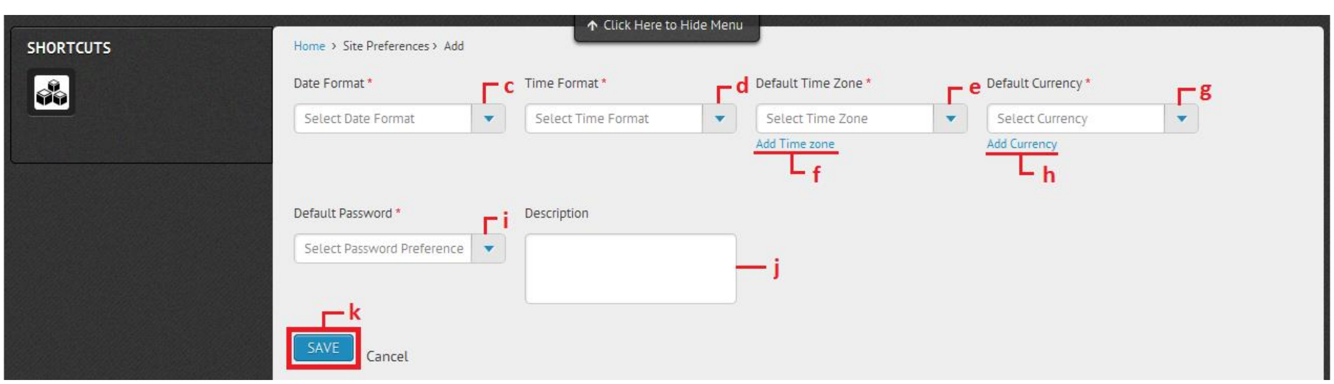


Figure 21

How to Activate and In-activate Modules:

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

Refer Figure 22

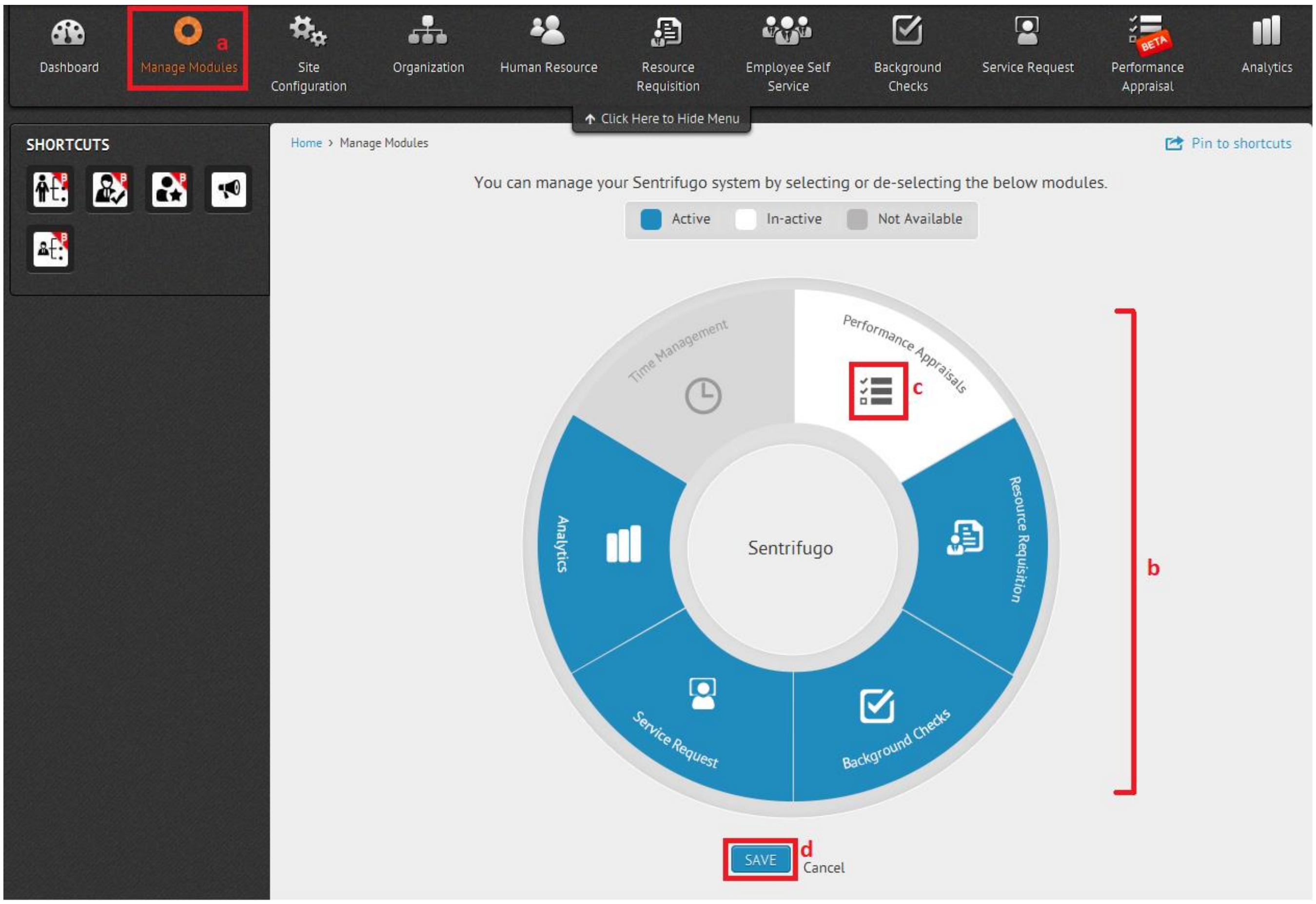


Figure 22

Do you want to Add Roles & Privileges:

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

Refer Figure 23

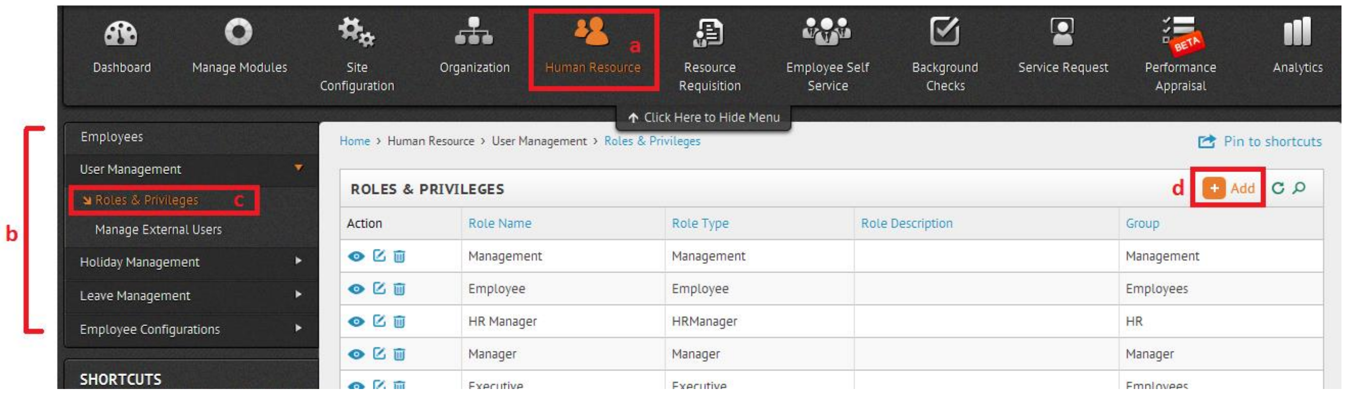


Figure 23

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

Refer Figure 24

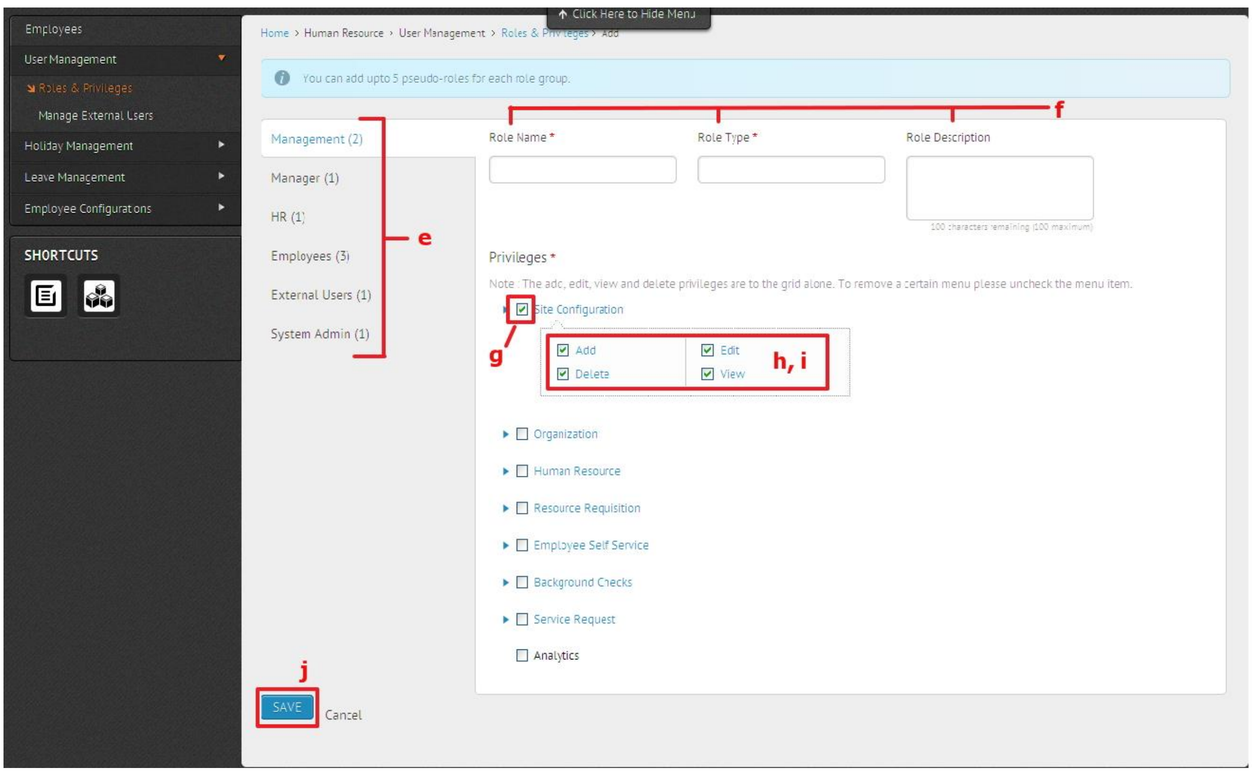


Figure 24

How do I Add an External User:

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

Refer Figure 25

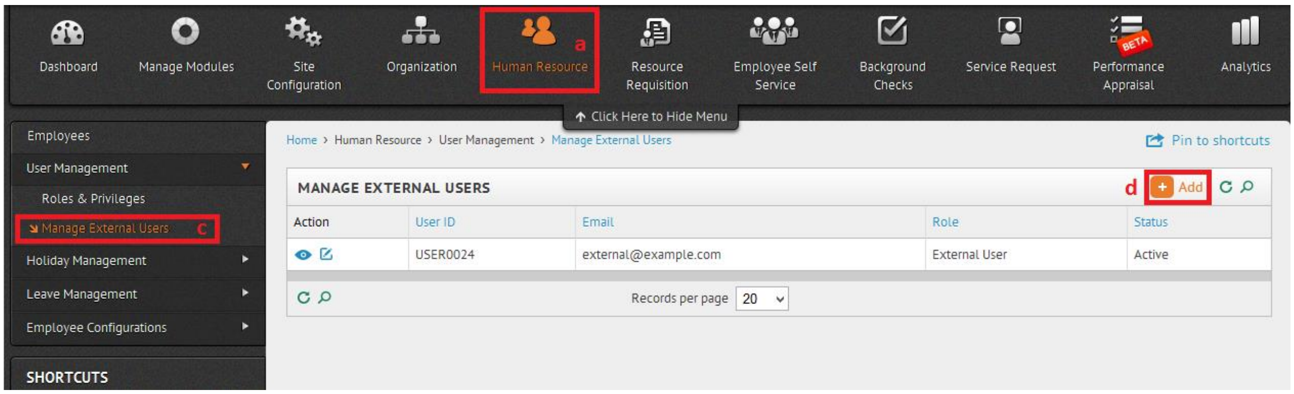


Figure 25

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

Refer Figure 26

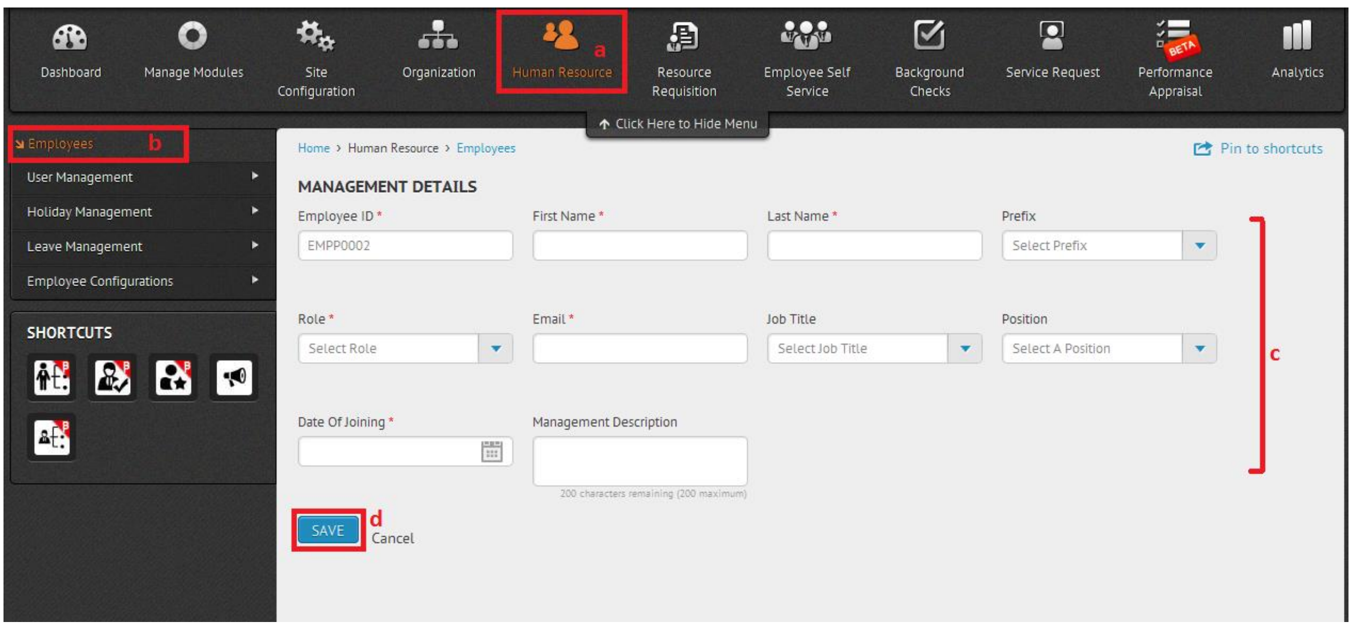
Figure 26

How do I Add an Employee:

Gathering Management Details is an important aspect of an organization. Using Sentrifugo, obtaining the management details is simple. Upon usage of the application for the first time, the management details are acquired right before adding employees to the organization.

a. Click on Human Resources in the top menu
b. Click on Employees submenu on the left side panel
c. Enter the management details
d. Click on Save to capture management details

Refer Figure 27



Refer Figure 27

After the management details are gathered, the privilege to add employees to the application will be enabled.

e. Click on Add button in the right side panel

Refer Figure 28

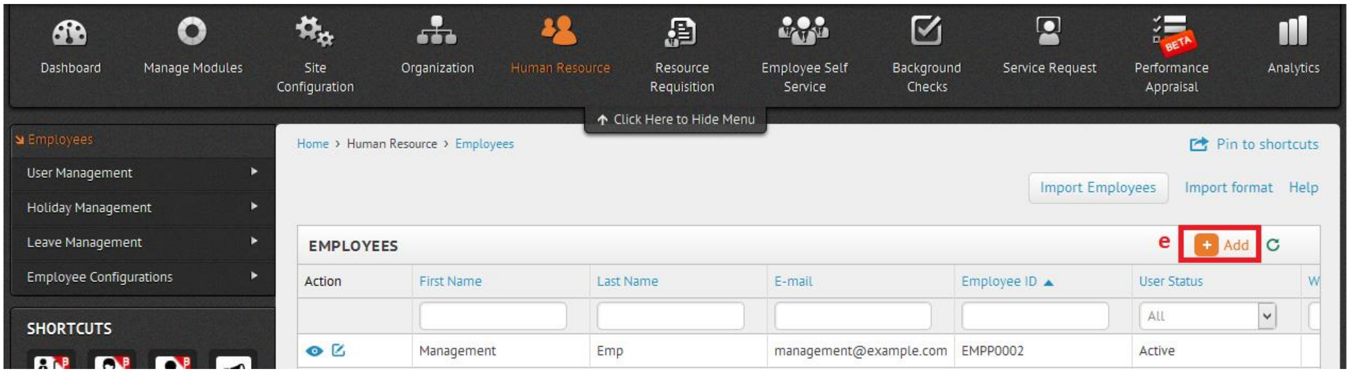


Figure 28

f. The Employee ID will be auto populated by the application
g. Enter the details respective to the employee
h. Click on Save to add the employee

Refer Figure 29

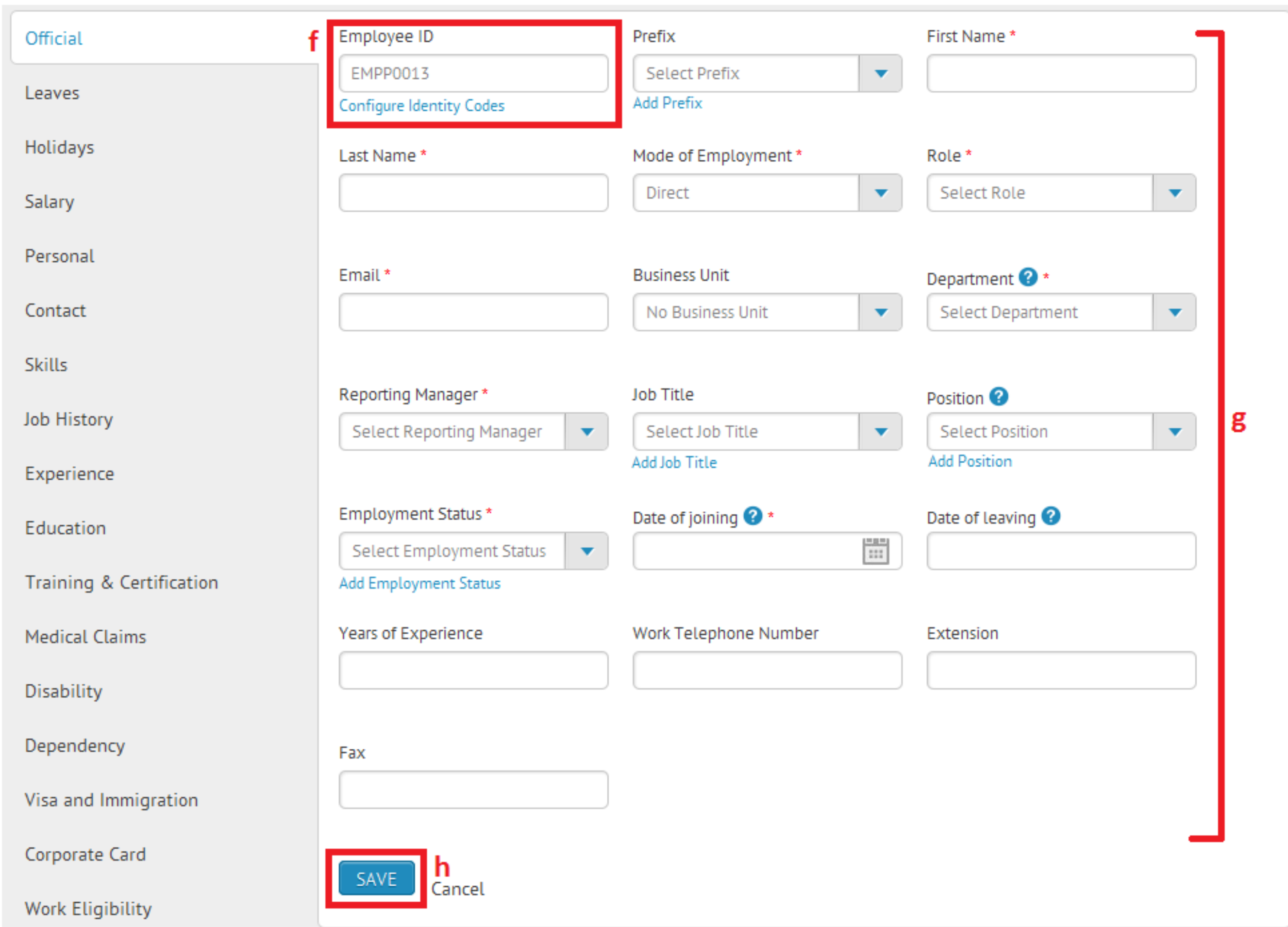


Figure 29

How can I Update My Details:

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

Refer Figure 30

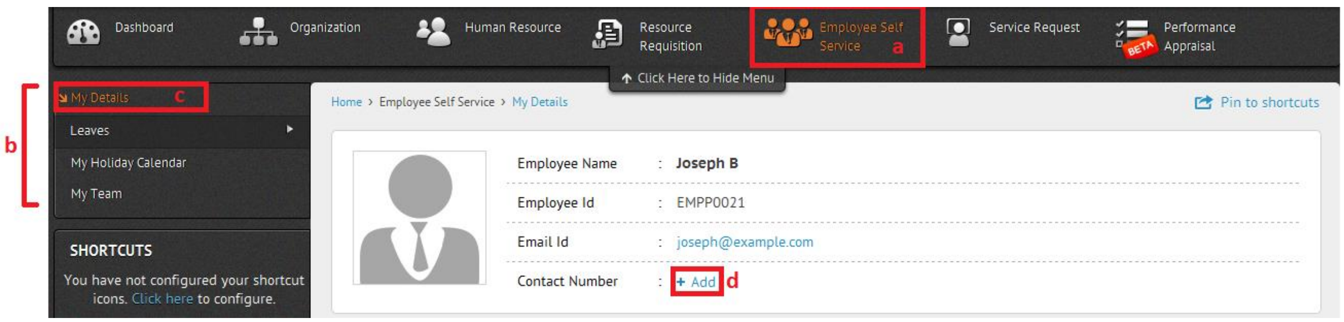


Figure 30

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

Refer Figure 31

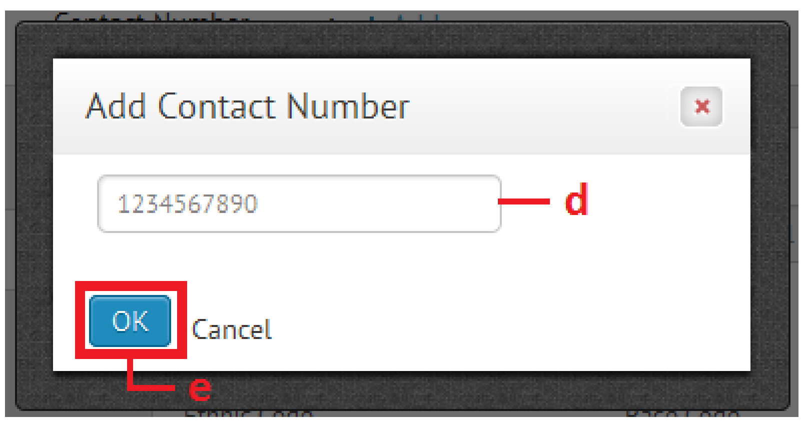


Figure 31

f. Click on the desired tab in the right side panel to add or edit details
g. Click on Edit in the respective screen to add or edit the details
h. Click on Save to add or update the details

Refer Figure 32

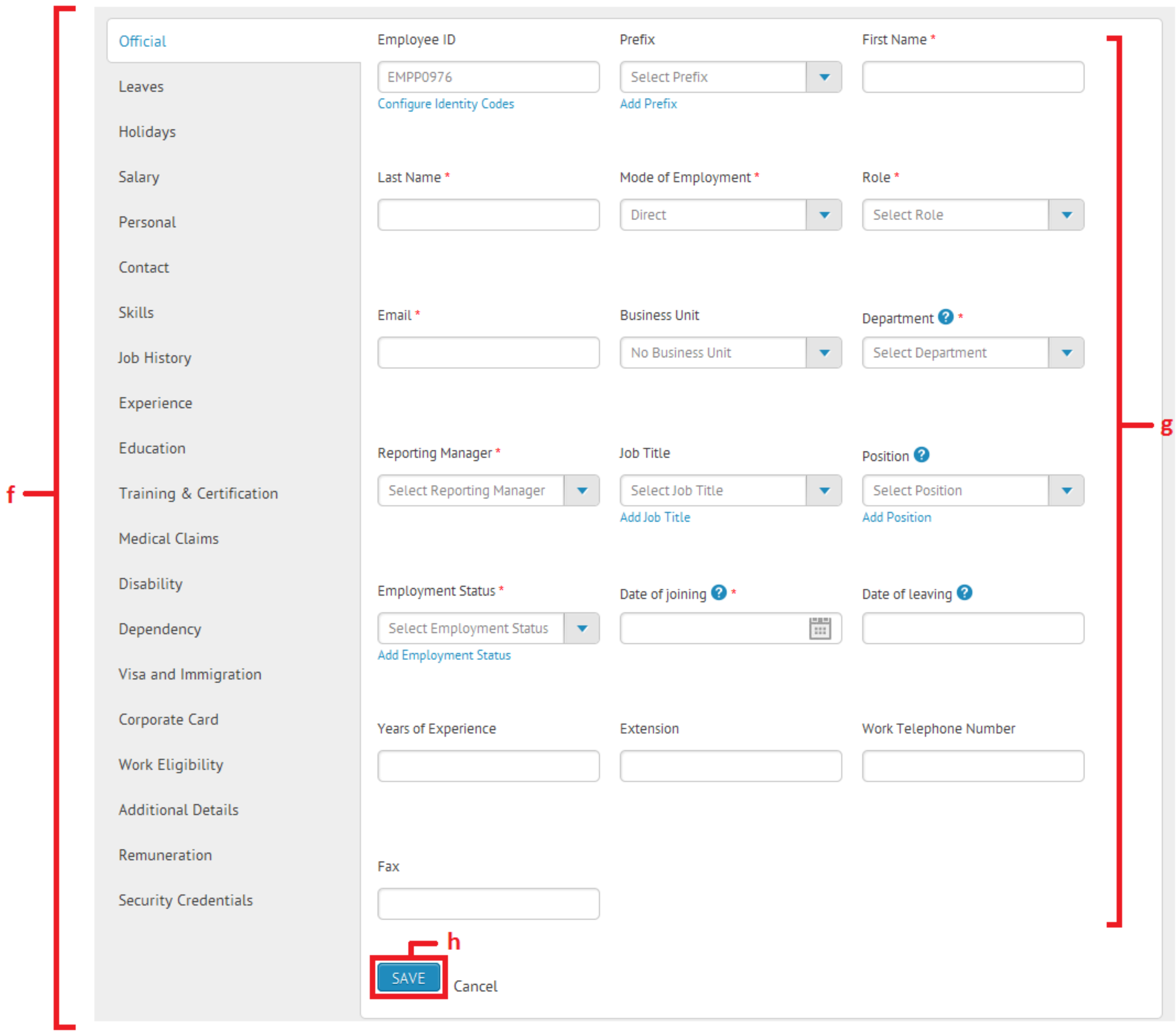


Figure 32

How to Add Employee Documents:

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

For employees to add documents:

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

Refer Figure 33

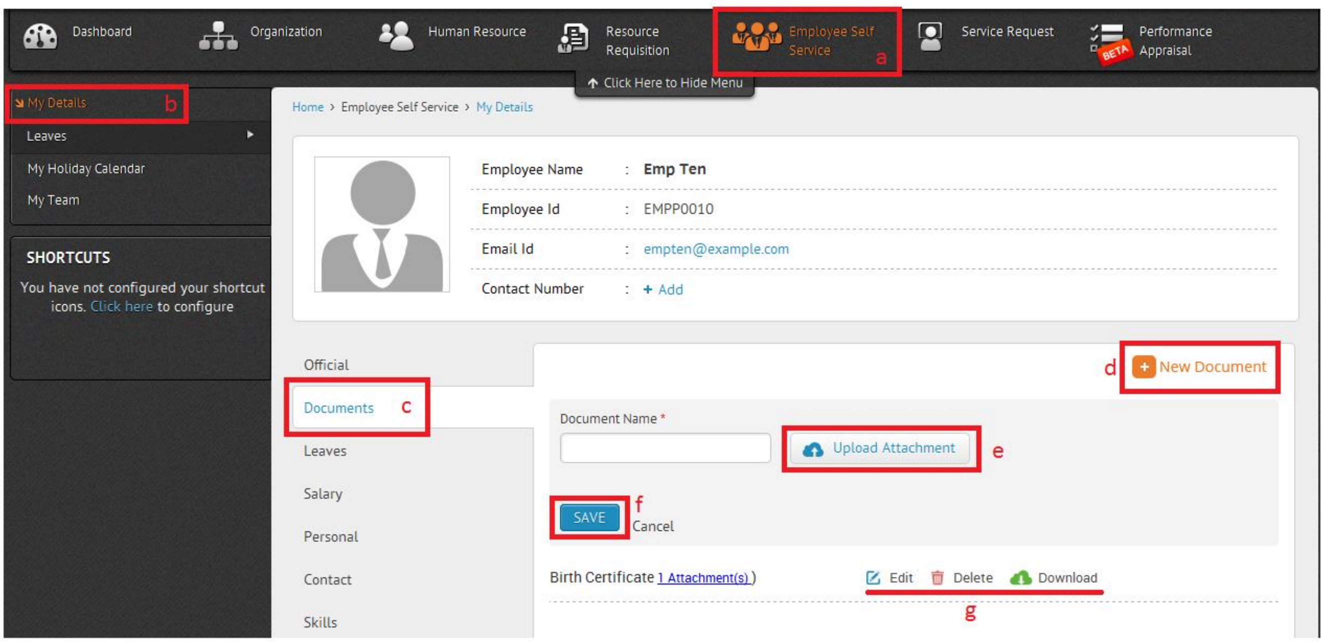


Figure 33

Want to Add Leave Management Options:

a. Click on Human Resources in the top menu
b. The left side panel will display the submenus
c. Click on Leave Management Options
d. Click on Add button in the right side panel

Refer Figure 34

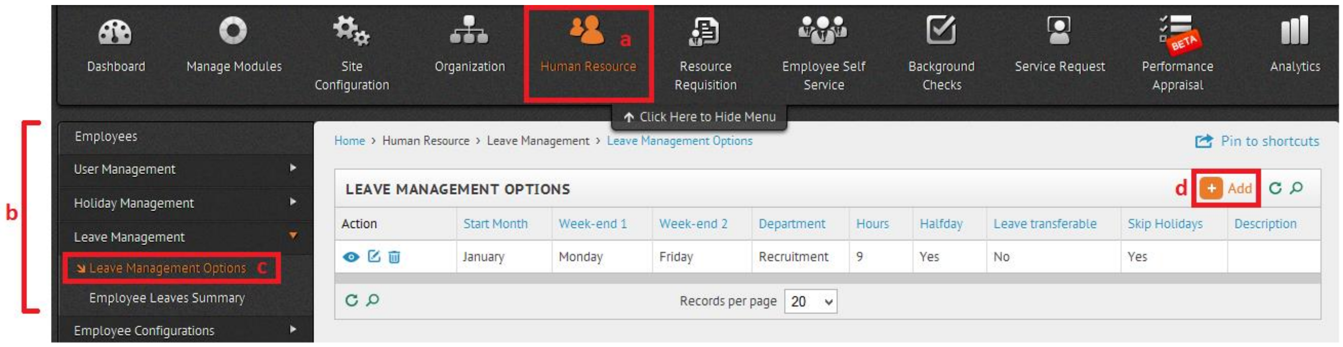


Figure 34

e. Select a business unit from Business Unit dropdown
f. Select a department from department dropdown
g. Select month from Calendar Start Month dropdown
h. Select weekend1 from Weekend1 dropdown
i. Select weekend2 from Weekend2 dropdown
j. Enter number of working hours
k. Provide permissions for Half Day Requests
l. Provide permissions to Allow Leave Transfers
m. Provide permissions to Skip Holidays
n. Click Save button to add leave management options for department

Refer Figure 35

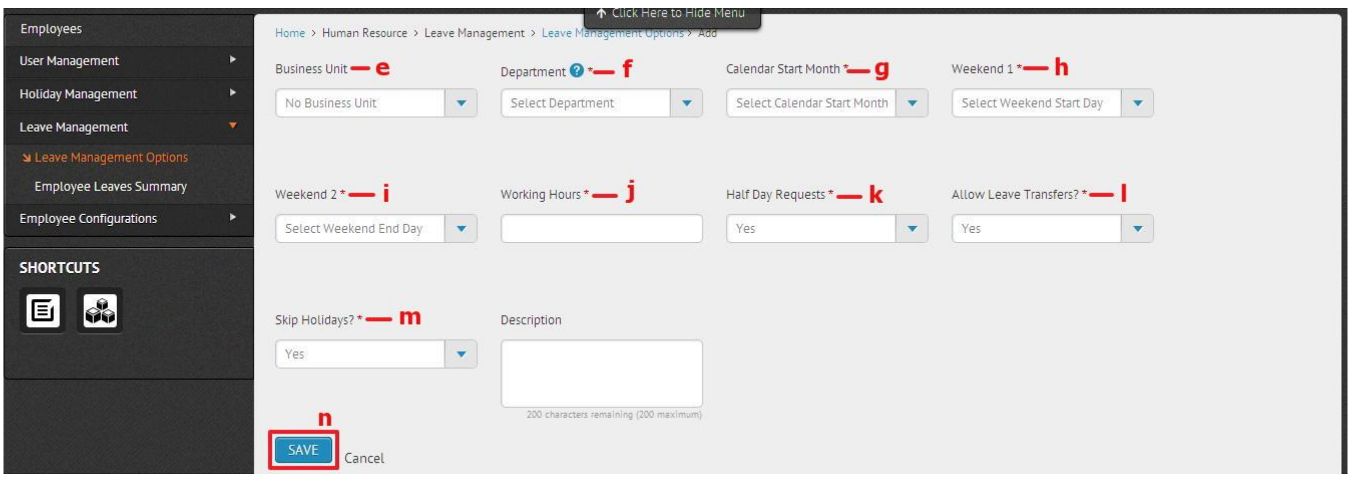


Figure 35

What if I want to Apply a Leave Request:

a. Click on Employee Self-Service in the top menu
b. The left side panel will display the submenus
c. Click on Leave Request
d. The current month calendar will be displayed on the right side panel
e. Click on previous and after arrow buttons to move to previous or next month
f. Click on the day you want to apply for leave to apply leave for one day

For further understanding, Refer Figure 36, which explain about adding leaves for the month of September

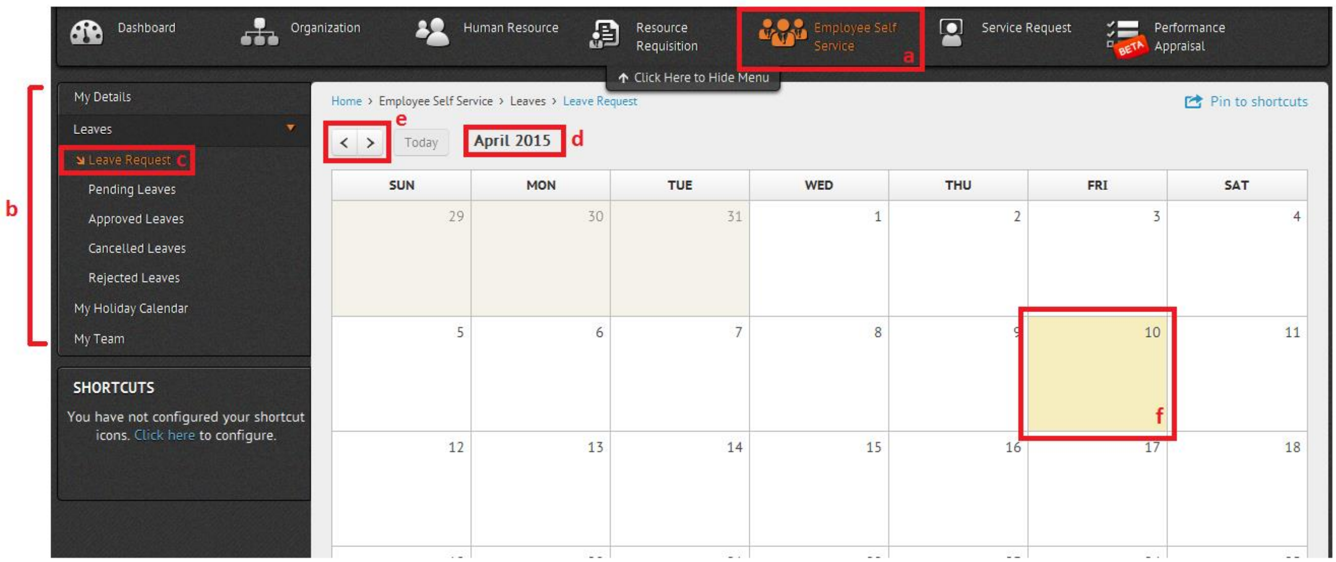


Figure 36

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

Refer Figure 37

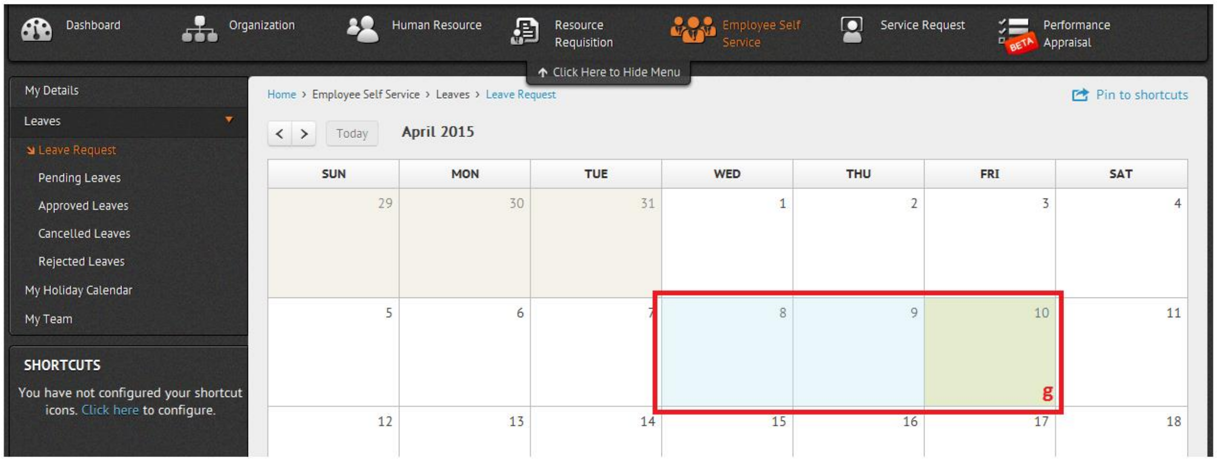


Figure 37

h. In the popup, enter the required details
i. Click on Apply to apply for leave(s)

Refer Figure 38

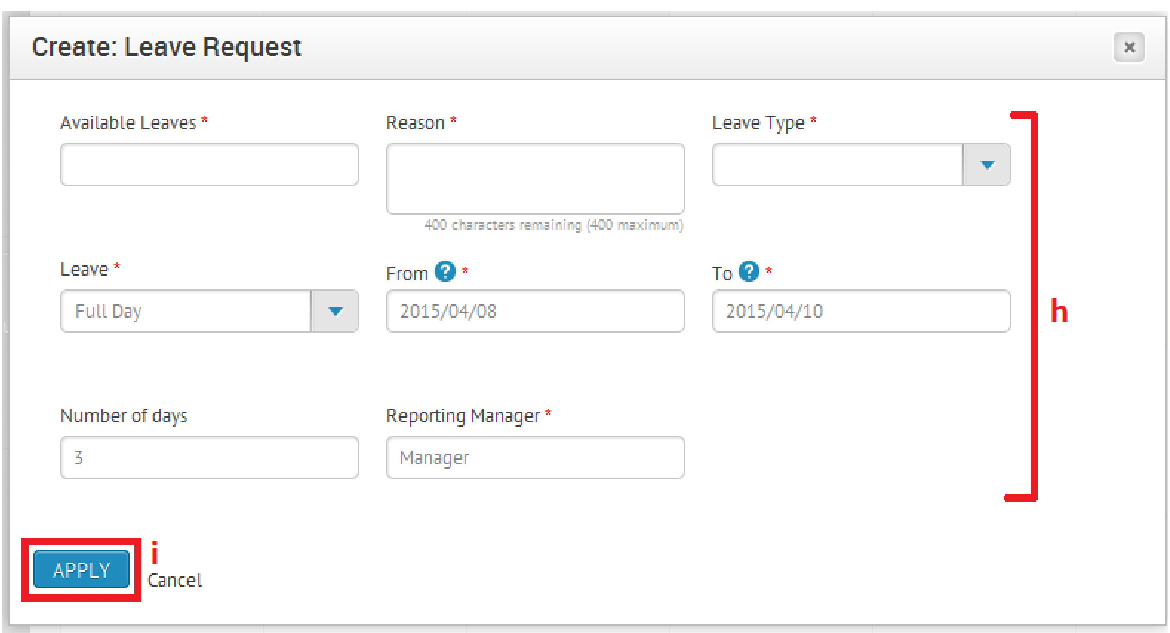


Figure 38

How do I Cancel my Leave Request:

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

Refer Figure 39

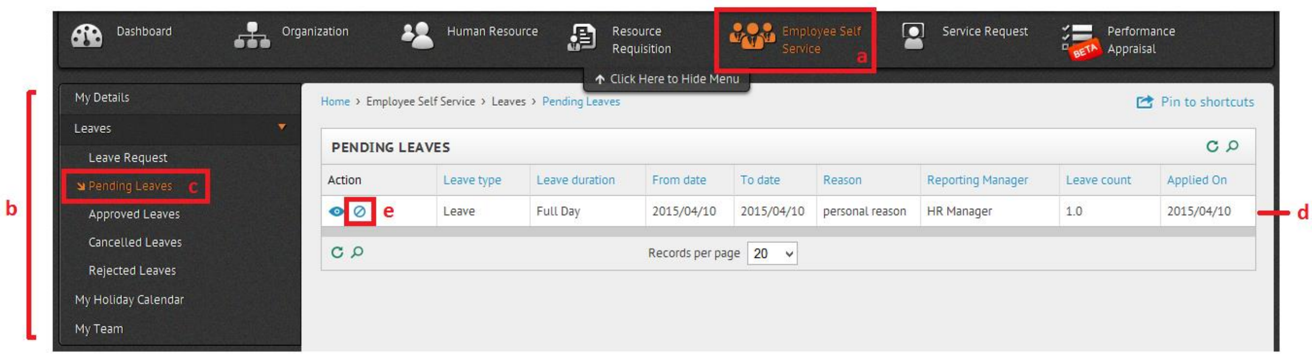


Figure 39

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

Refer Figure 40

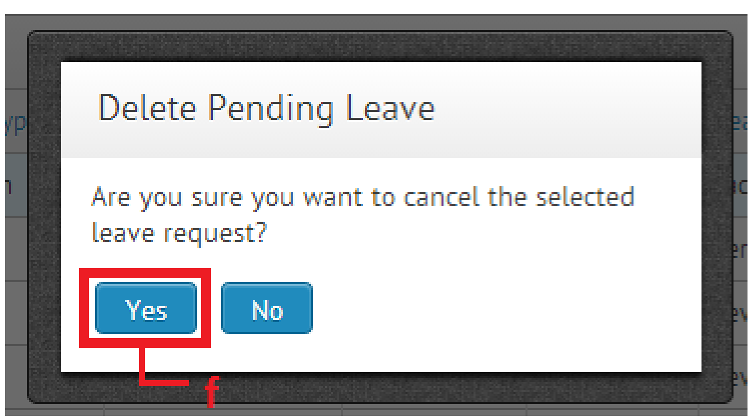


Figure 40

How to Approve or Reject Leave Requests:

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

Refer Figure 41

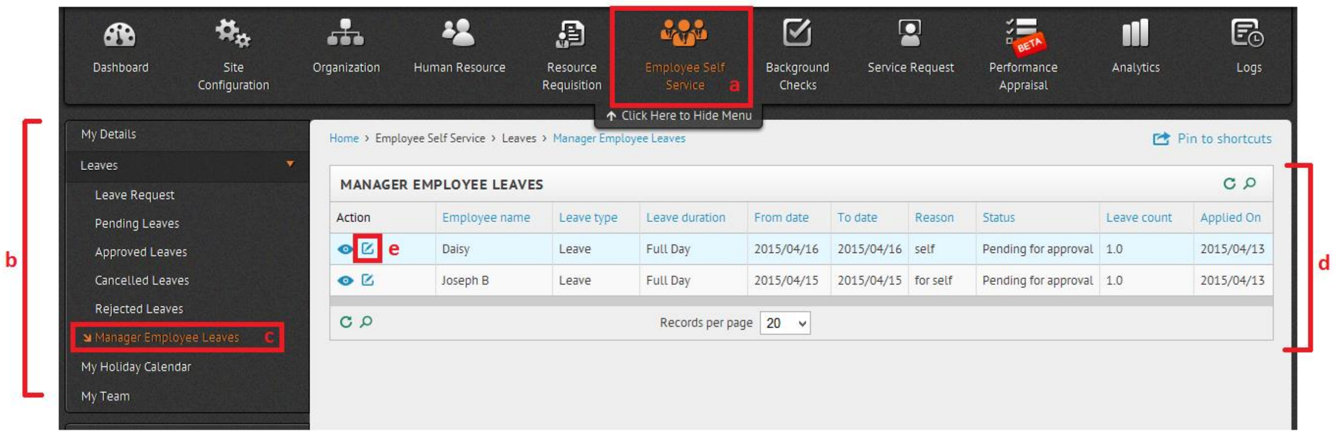


Figure 41

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

Refer Figure 42

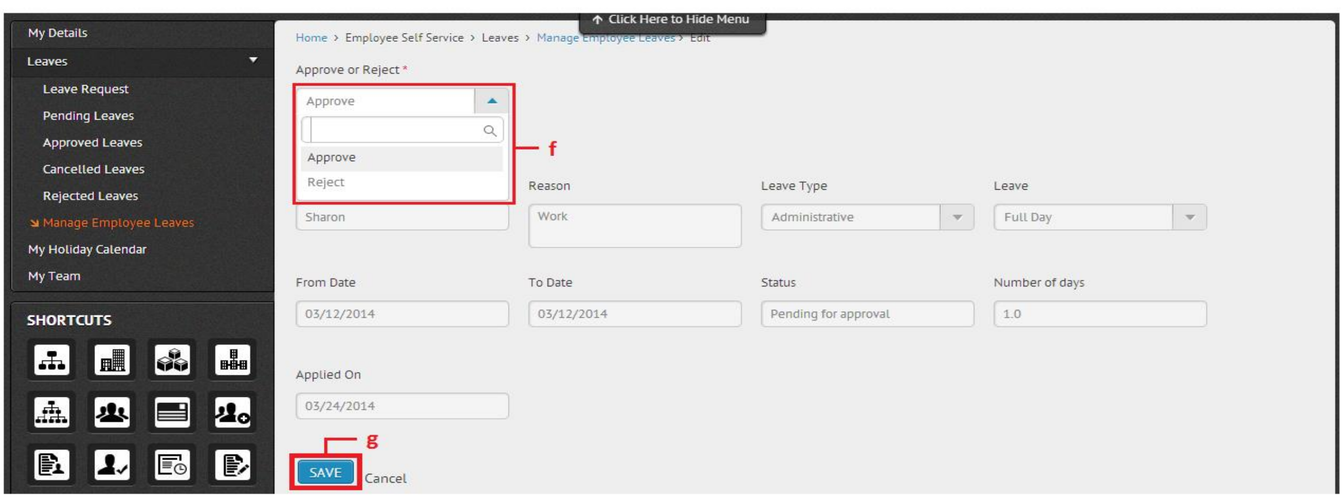


Figure 42

How do I Raise a Resource Requisition:

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

Refer Figure 43

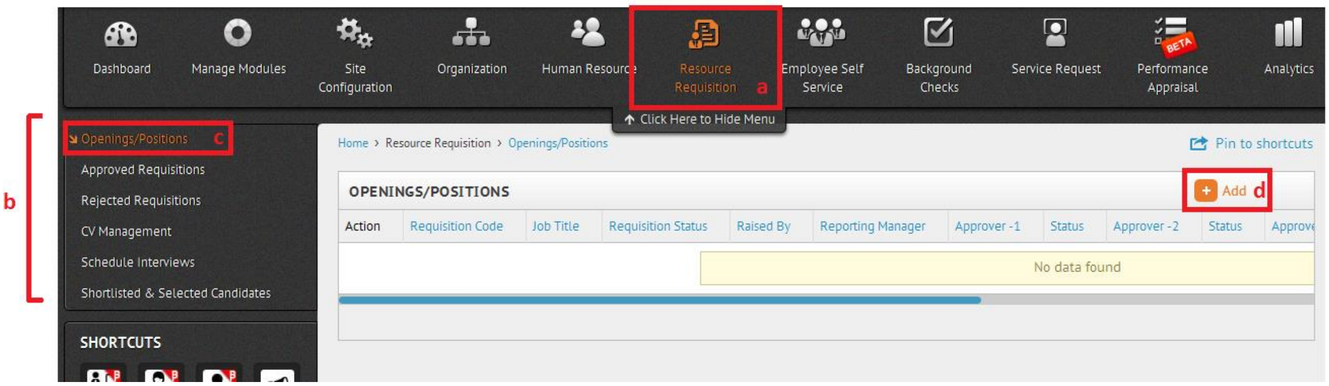


Figure 43

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

Refer Figure 44

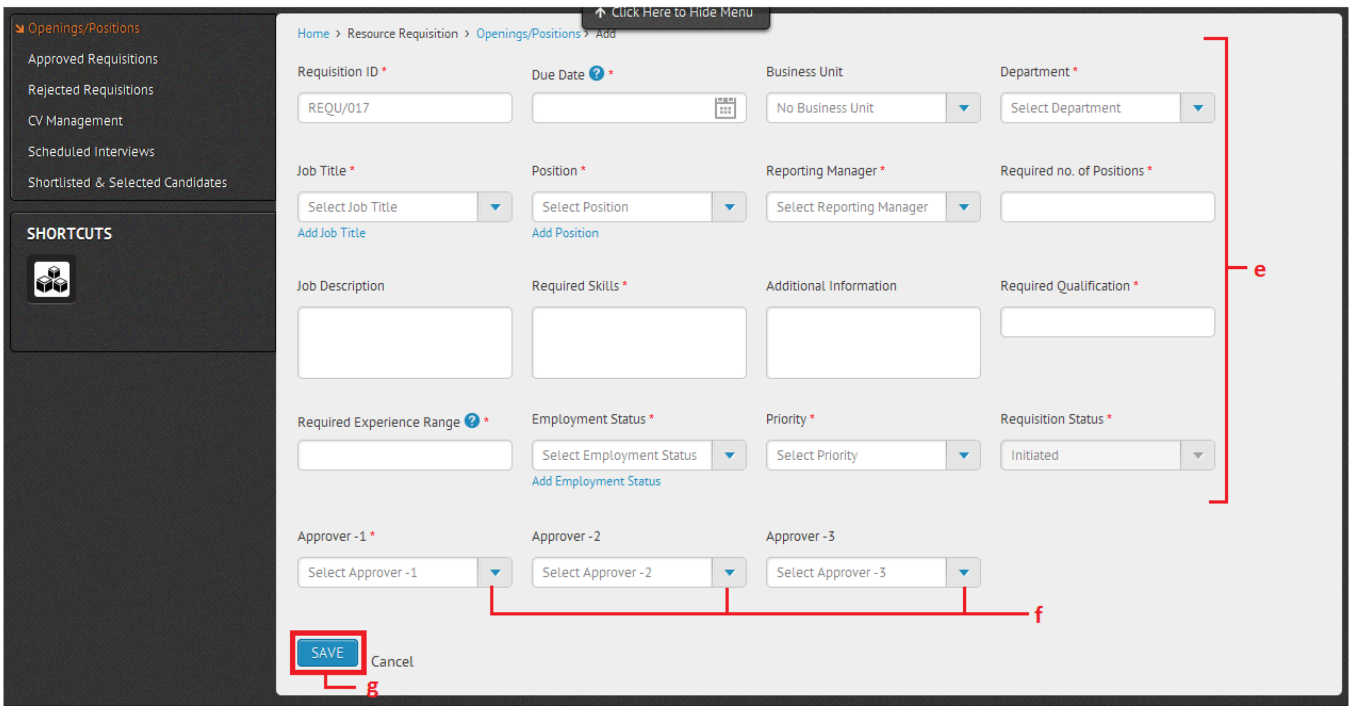


Figure 44

Where do I Add Screening Type for Background Checks:

a. Click on Background Checks in the top menu
b. The left side panel will display the submenus
c. Click on Screening Types
d. Click on Add button in the right side panel

Refer Figure 45

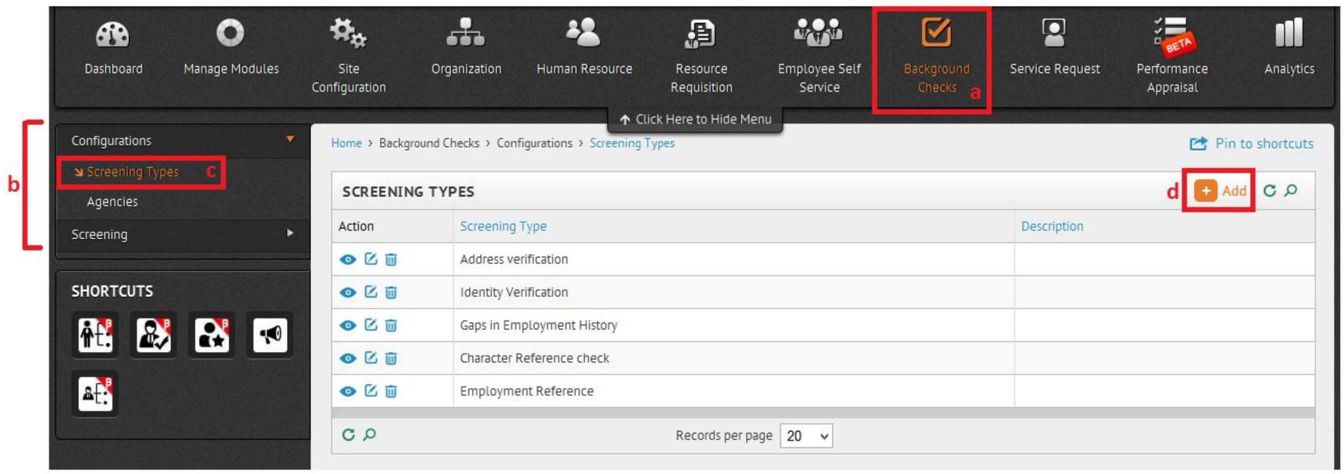


Figure 45

e. Enter the Screening Type and Description if necessary
f. Click on Save button to add the Screening Type

Refer Figure 46

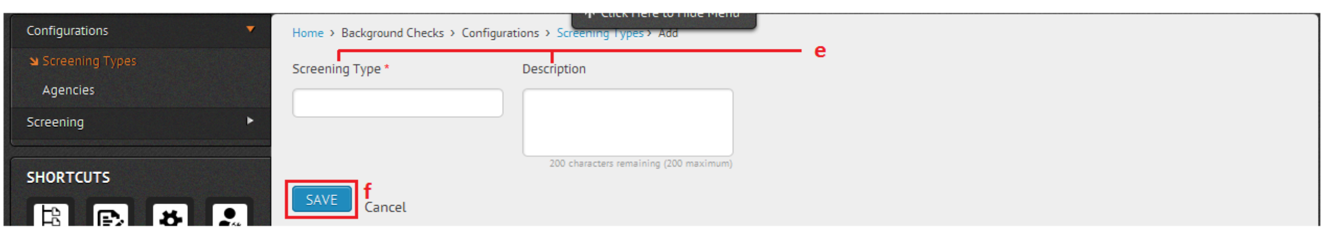


Figure 46

How do I Add an Agency to Perform Background Checks:

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

Refer Figure 47

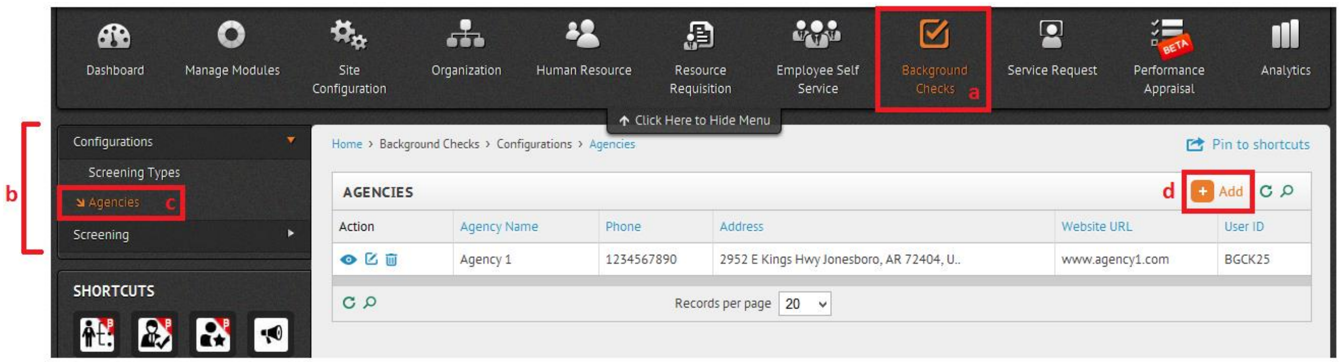


Figure 47

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

Refer Figure 48

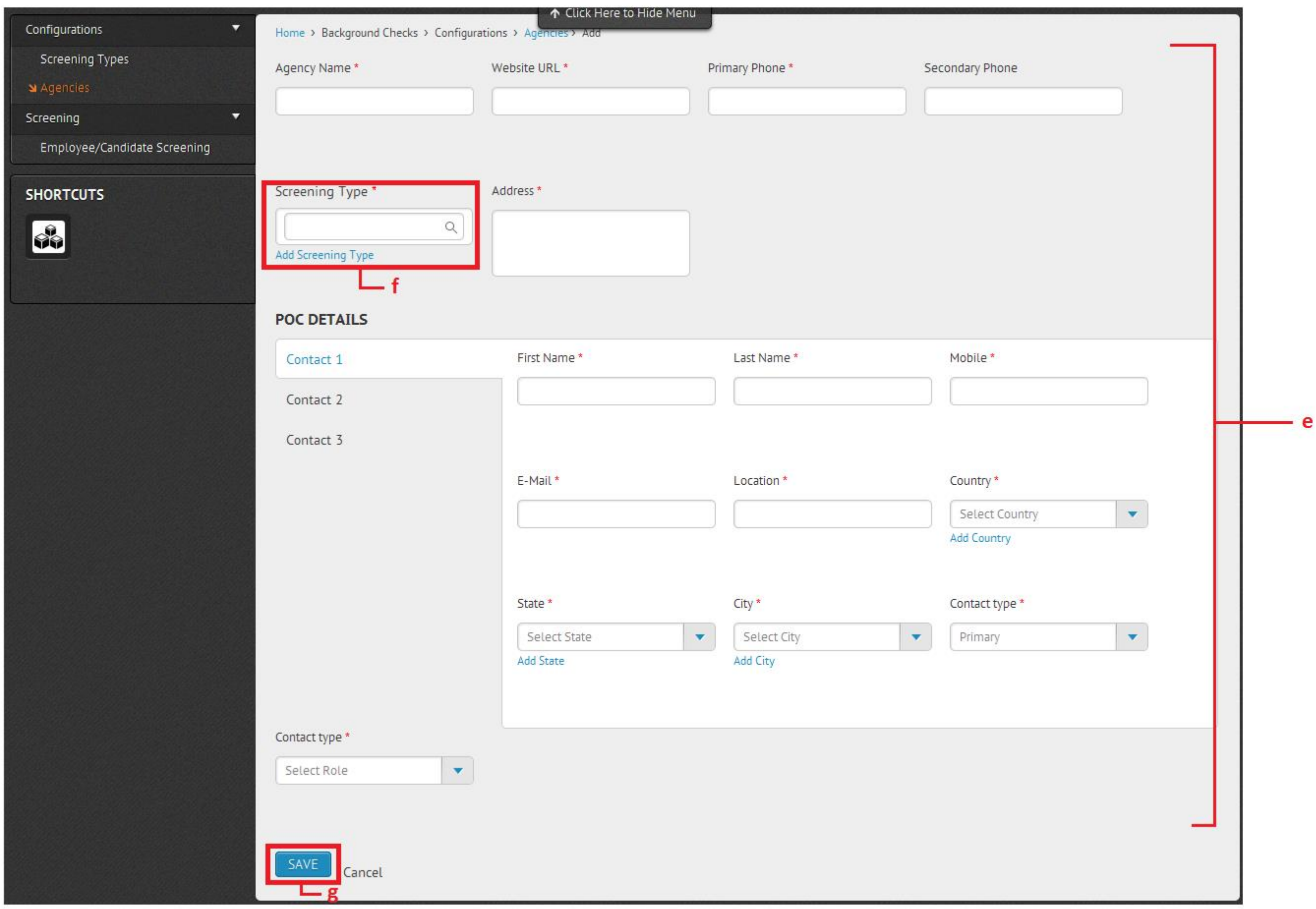


Figure 48

Can I Send an Employee for Background Checks:

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

Refer Figure 49

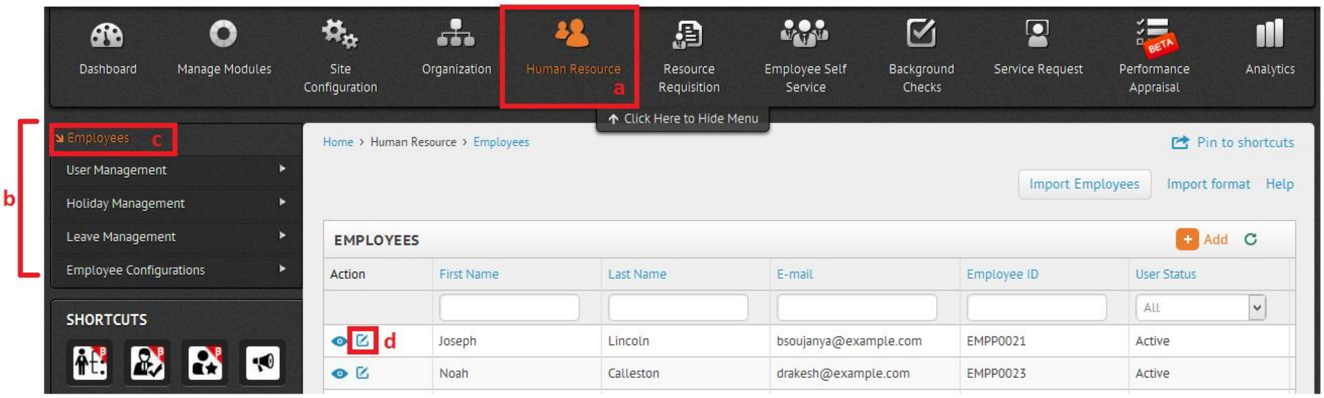


Figure 49

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

Refer Figure 50

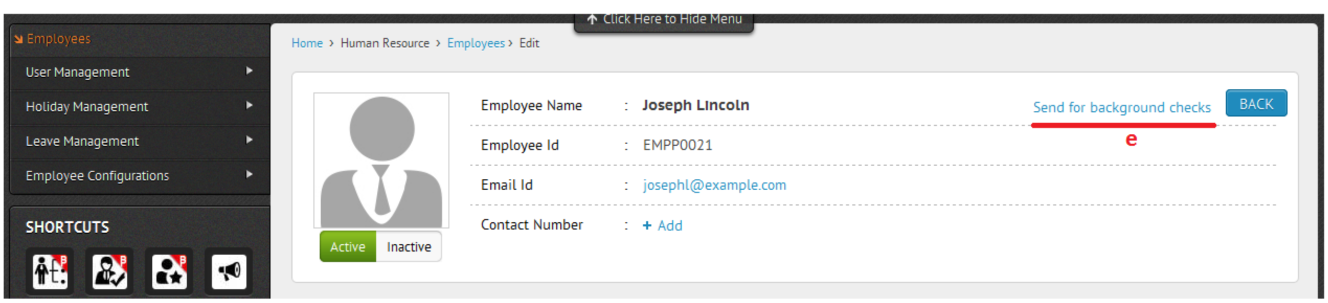


Figure 50

Want to View & Generate Reports:

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

Refer Figure 51

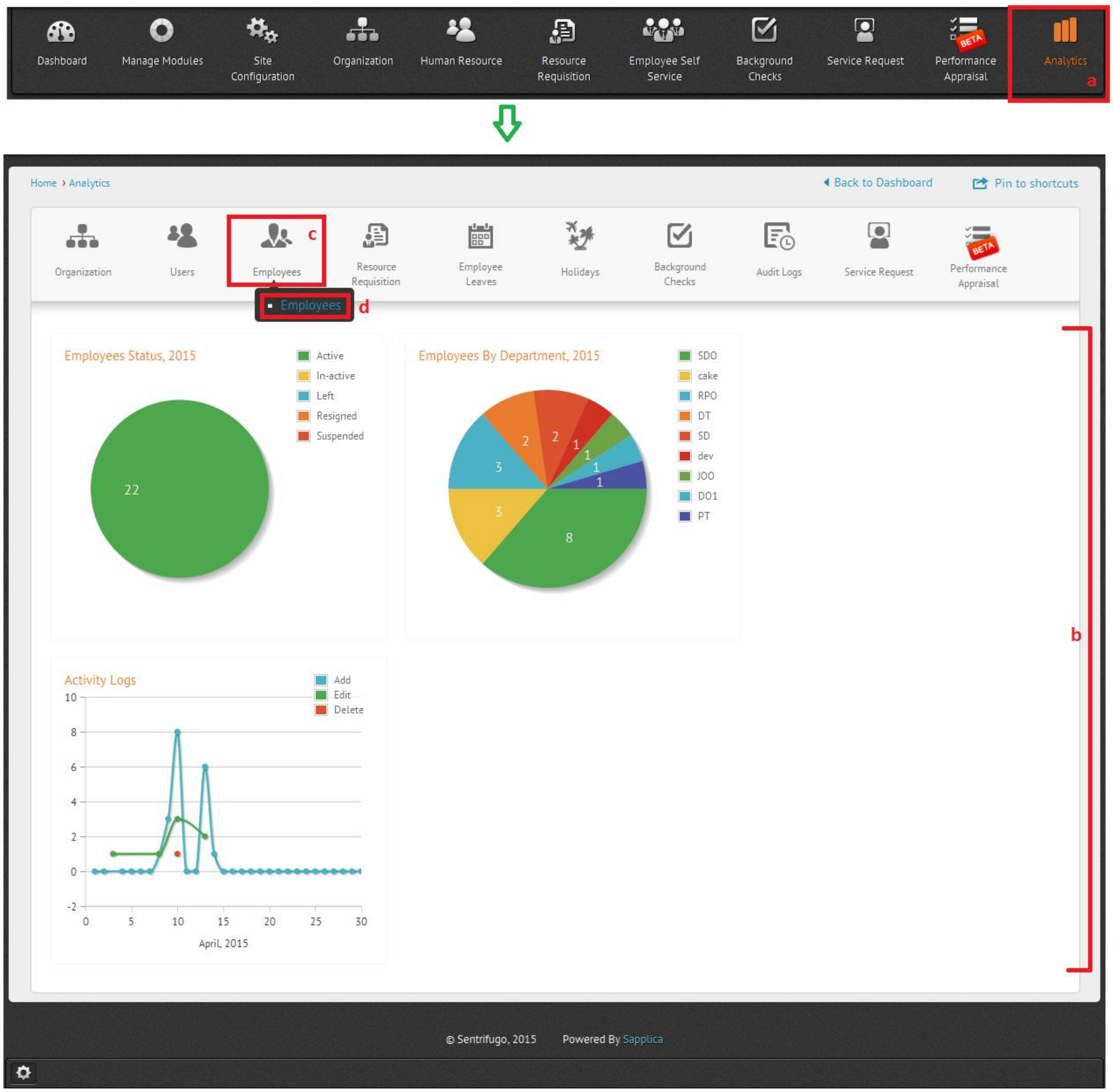
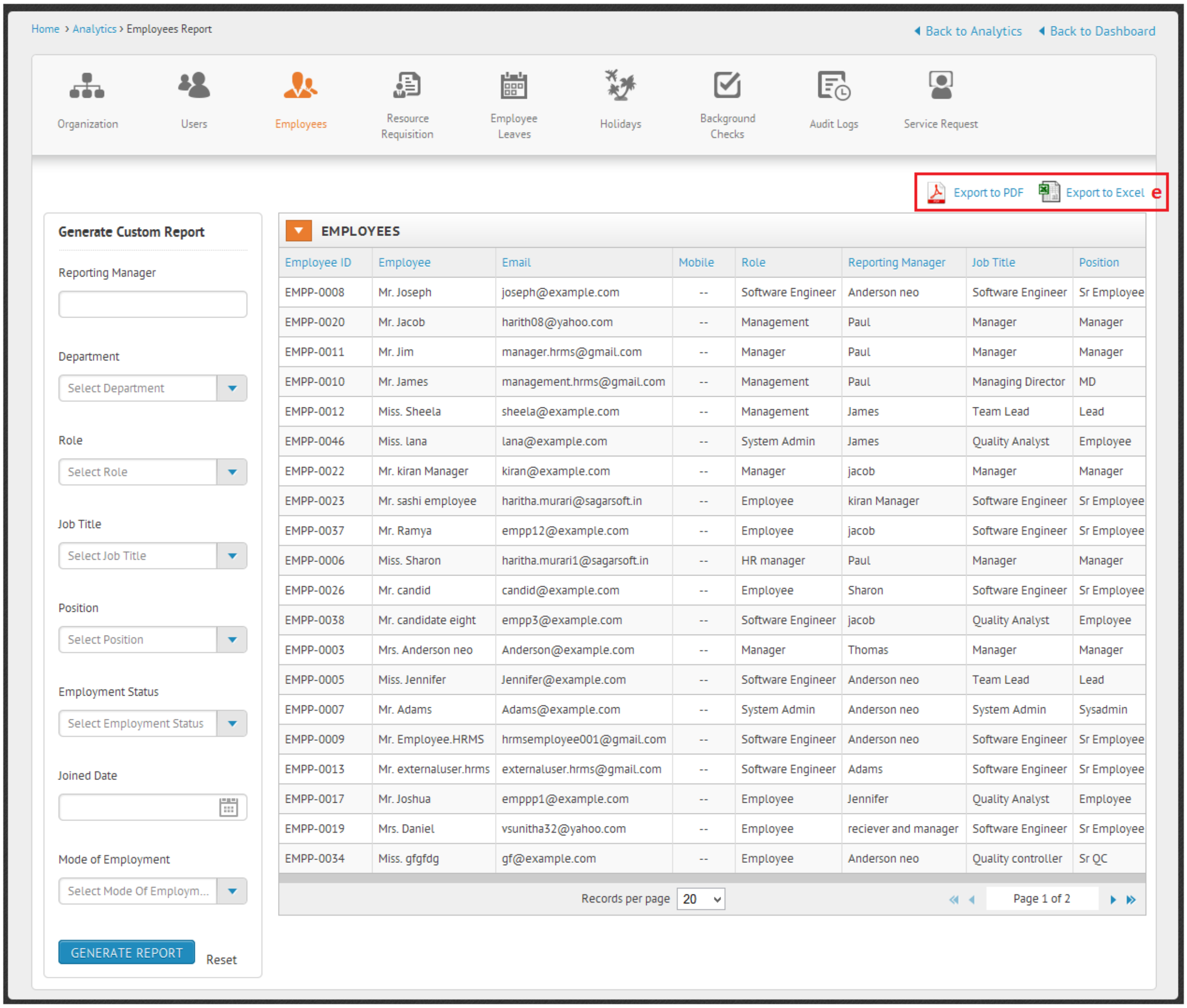


Figure 51

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

Refer Figure 52



Employee ID	Employee	Email	Mobile	Role	Reporting Manager	Job Title	Position
EMPP-0008	Mr. Joseph	joseph@example.com	--	Software Engineer	Anderson neo	Software Engineer	Sr Employee
EMPP-0020	Mr. Jacob	harith08@yahoo.com	--	Management	Paul	Manager	Manager
EMPP-0011	Mr. Jim	manager.hrms@gmail.com	--	Manager	Paul	Manager	Manager
EMPP-0010	Mr. James	management.hrms@gmail.com	--	Management	Paul	Managing Director	MD
EMPP-0012	Miss. Sheela	sheela@example.com	--	Management	James	Team Lead	Lead
EMPP-0046	Miss. lana	lana@example.com	--	System Admin	James	Quality Analyst	Employee
EMPP-0022	Mr. kiran Manager	kiran@example.com	--	Manager	jacob	Manager	Manager
EMPP-0023	Mr. sashi employee	haritha.murari@sagarsoft.in	--	Employee	kiran Manager	Software Engineer	Sr Employee
EMPP-0037	Mr. Ramya	empp12@example.com	--	Employee	jacob	Software Engineer	Sr Employee
EMPP-0006	Miss. Sharon	haritha.murari1@sagarsoft.in	--	HR manager	Paul	Manager	Manager
EMPP-0026	Mr. candid	candid@example.com	--	Employee	Sharon	Software Engineer	Sr Employee
EMPP-0038	Mr. candidate eight	empp3@example.com	--	Software Engineer	jacob	Quality Analyst	Employee
EMPP-0003	Mrs. Anderson neo	Anderson@example.com	--	Manager	Thomas	Manager	Manager
EMPP-0005	Miss. Jennifer	Jennifer@example.com	--	Software Engineer	Anderson neo	Team Lead	Lead
EMPP-0007	Mr. Adams	Adams@example.com	--	System Admin	Anderson neo	System Admin	Sysadmin
EMPP-0009	Mr. Employee.HRMS	hrmsemployee001@gmail.com	--	Software Engineer	Anderson neo	Software Engineer	Sr Employee
EMPP-0013	Mr. externaluser.hrms	externaluser.hrms@gmail.com	--	Software Engineer	Adams	Software Engineer	Sr Employee
EMPP-0017	Mr. Joshua	empppp1@example.com	--	Employee	Jennifer	Quality Analyst	Employee
EMPP-0019	Mrs. Daniel	vsunitha32@yahoo.com	--	Employee	reciever and manager	Software Engineer	Sr Employee
EMPP-0034	Miss. gfgfdg	gf@example.com	--	Employee	Anderson neo	Quality controller	Sr QC

Figure 52

Or, to generate custom reports

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

Refer Figure 53

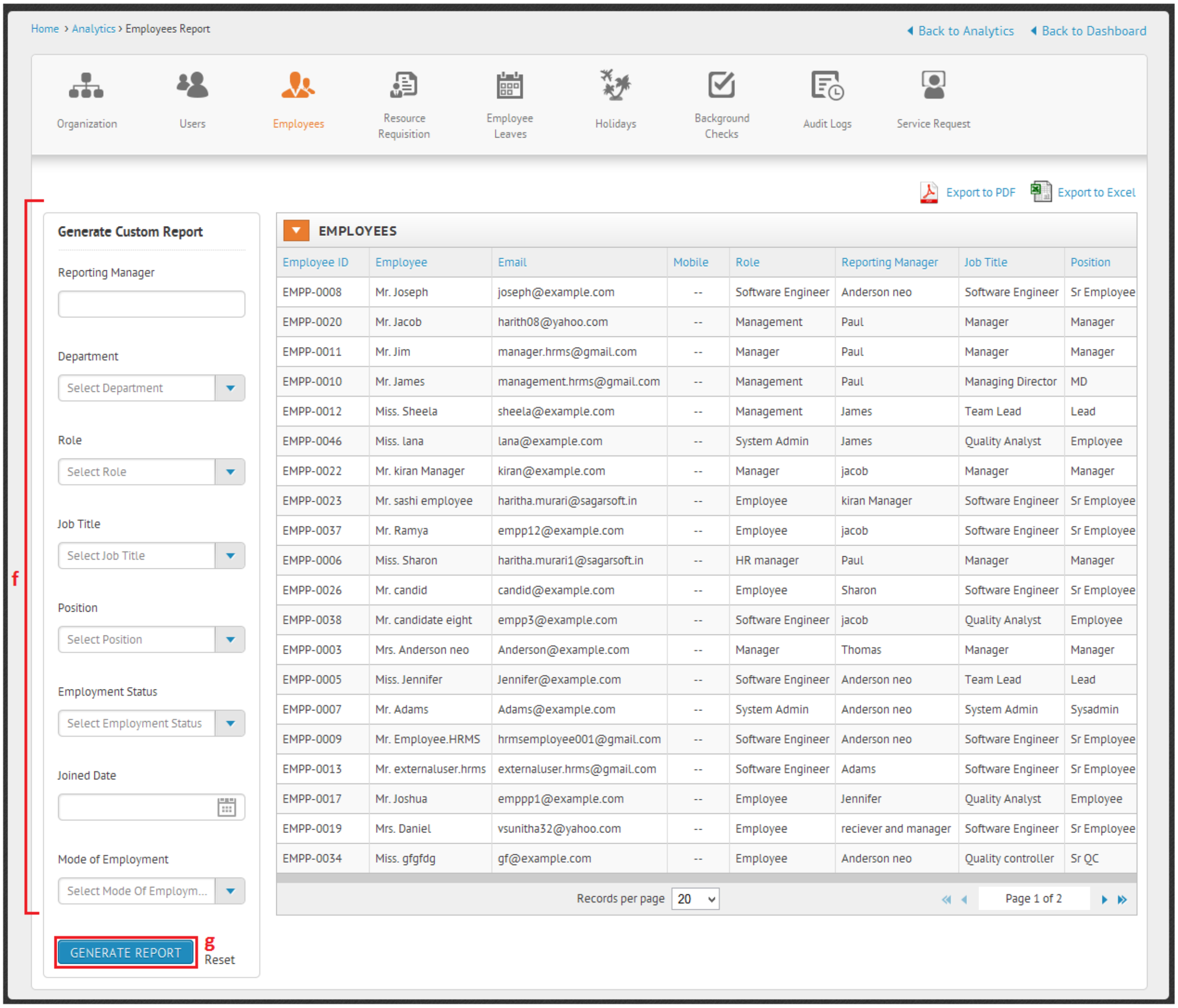


Figure 53

Where can you View Activity log:

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

Refer Figure 54

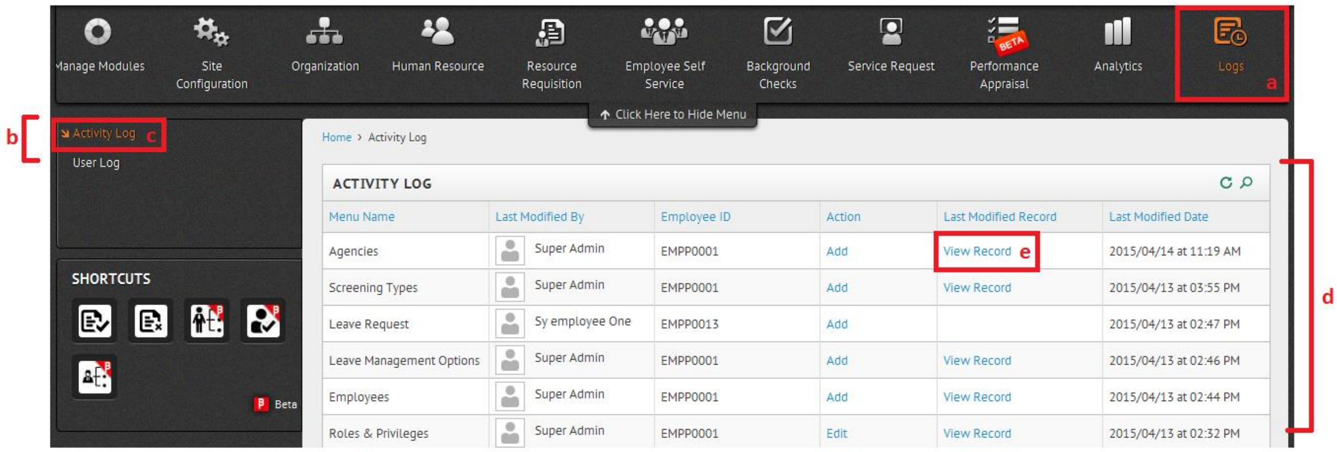


Figure 54

Where can I View User log:

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

Refer Figure 55

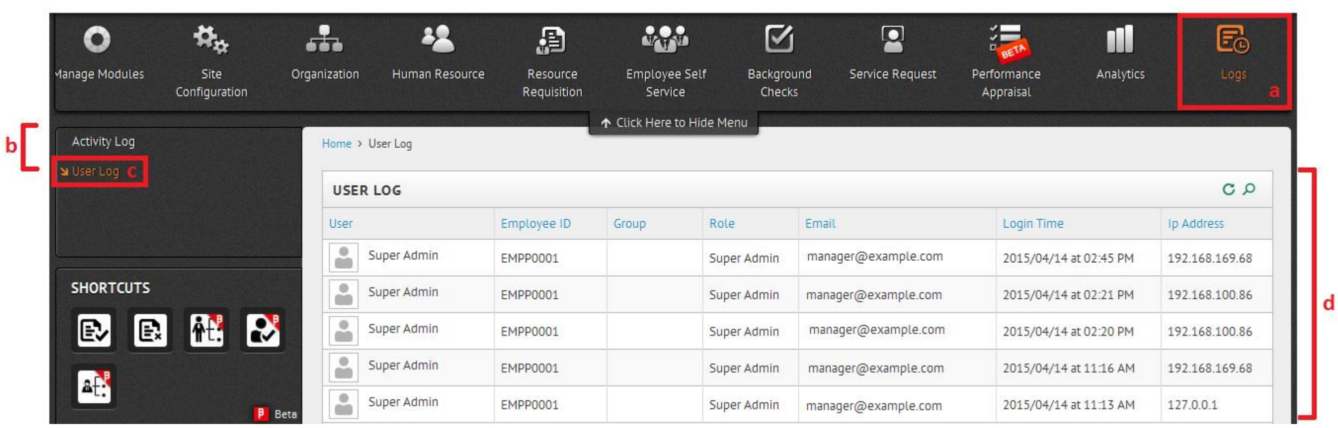


Figure 55

Looking to Set Shortcuts:

a. Click on the organization logo in the top left of the header
b. Click on Click here link in the Shortcuts panel in the left side

Refer Figure 56

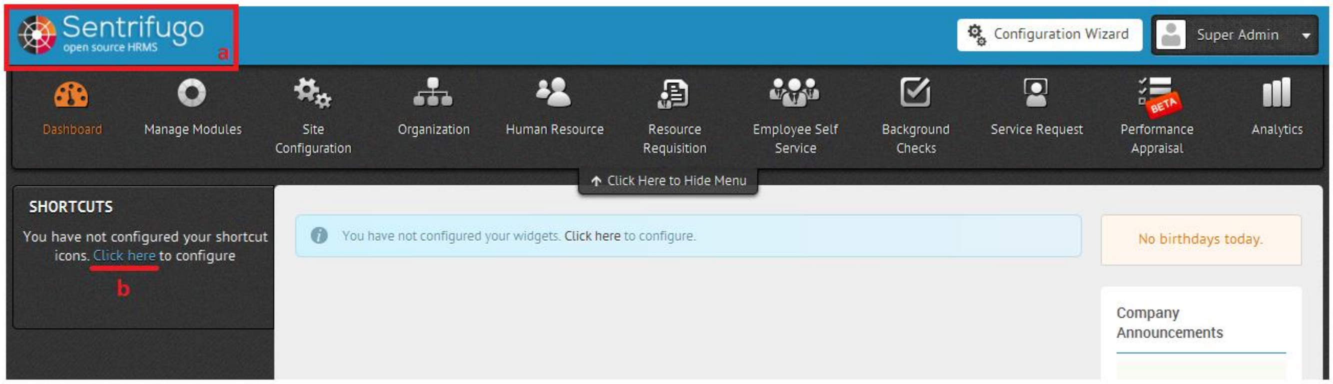


Figure 56

Or

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

Refer Figure 57

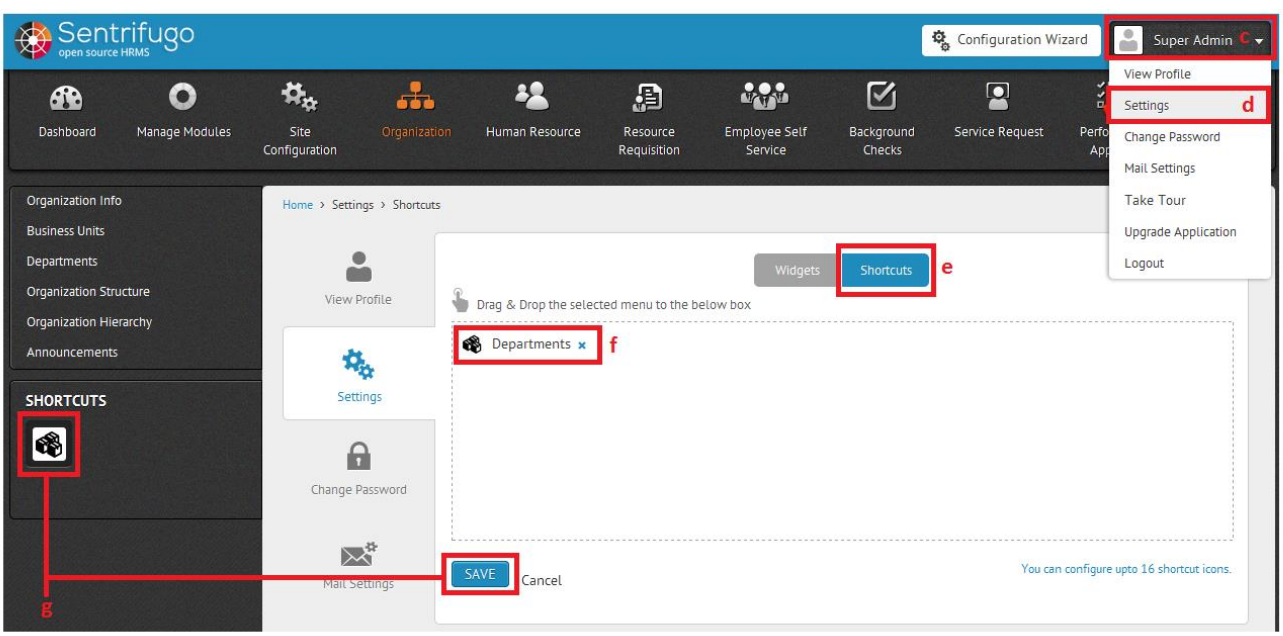


Figure 57

You can also create Shortcuts as you browse through the application

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

For further understanding, Refer Figure 58, which explains about creating a shortcut as you browse through the application

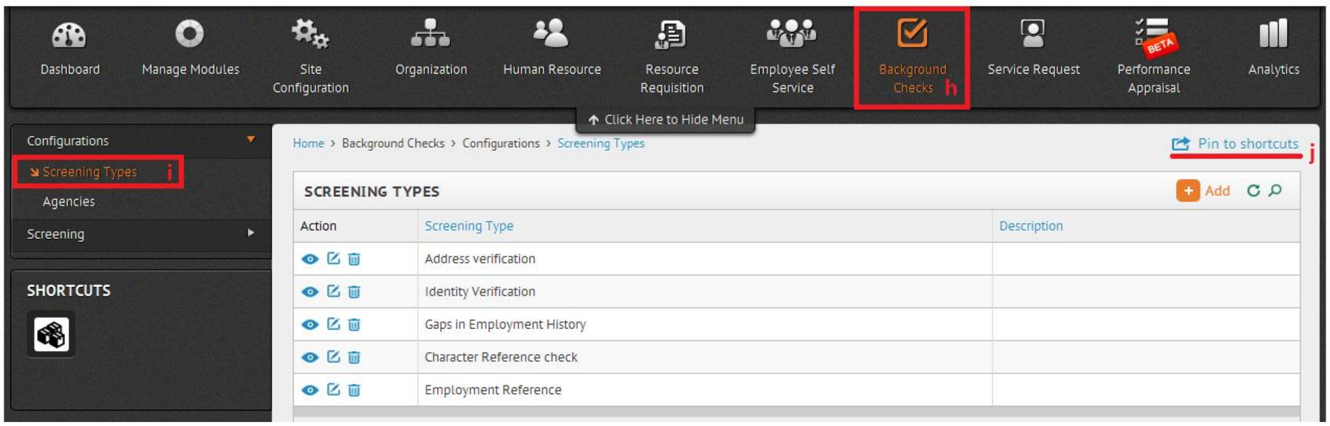


Figure 58

Looking to Set Widgets:

a. Click on the organization logo in the top left of the header
b. Click on Click here link in the Widgets panel in the right side

Refer figure 59

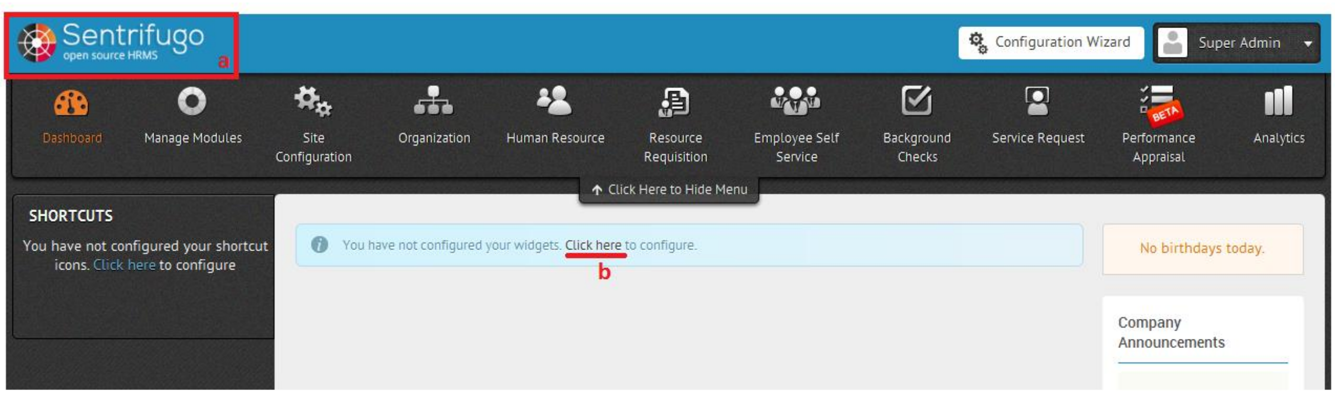


Figure 59

Or

c. Click on logged in user's name in the top right of the header
d. Click on Settings in the dropdown
Or

e. Click on Settings icon in the bottom left of the footer
f. Select Widgets button in the settings page
g. Drag and drop the selected menu item(s) in the widgets box
h. Click on Save to add Widgets in the Widgets panel

Refer Figure 60

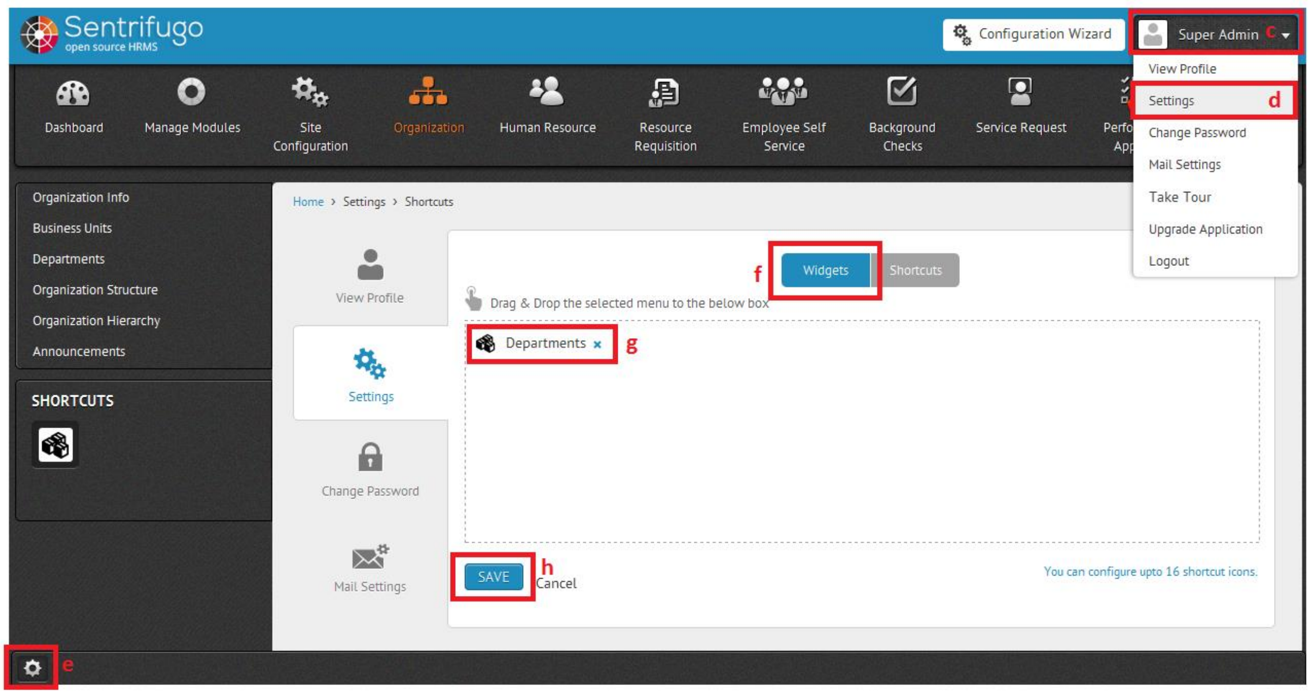


Figure 60

Want to Configure Service Request:

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

For further understanding refer to Figure 61, which explains about adding Settings

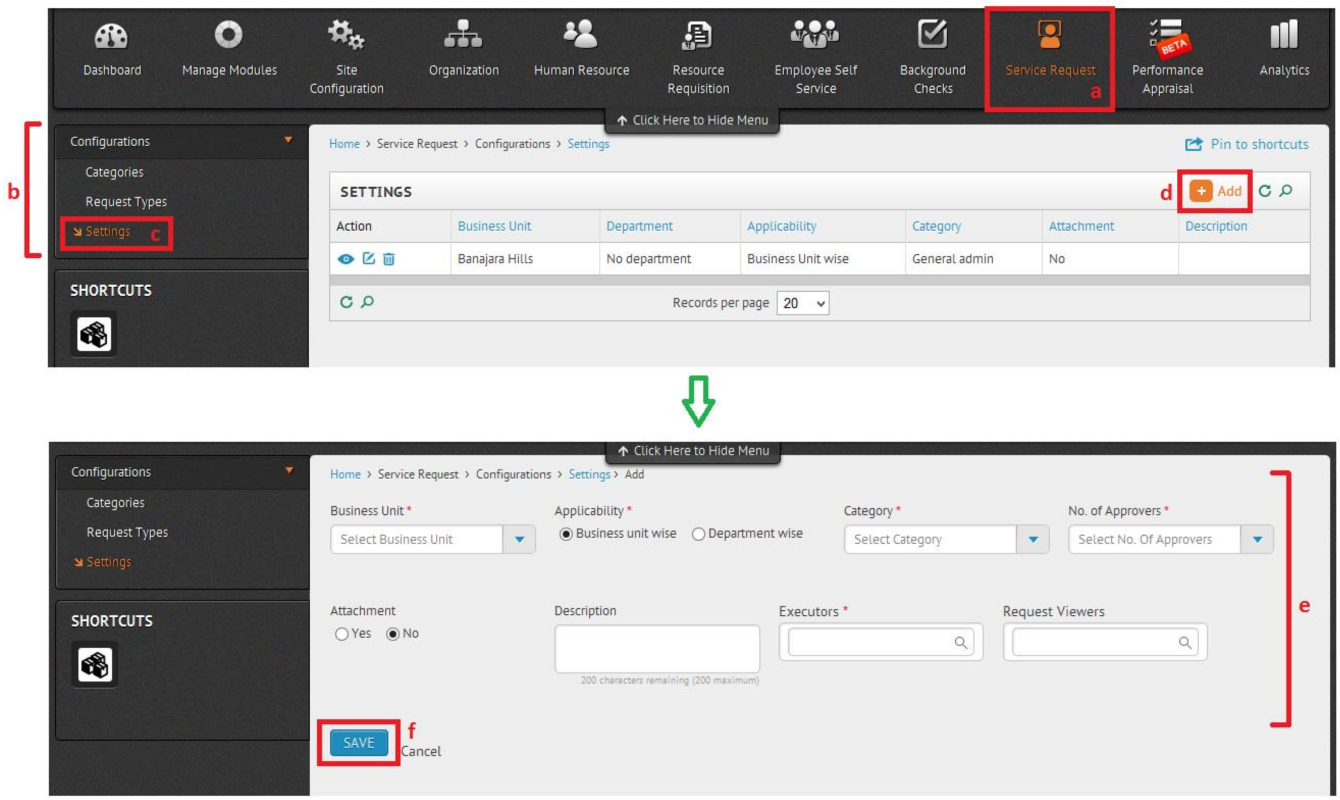


Figure 61

Want to Edit Service Request:

a. Click on the Service Request in the top menu
b. The left side panel will display the submenus
c. Click on desired submenu
d. Click on Edit icon for the record that is to be edited on the right side panel
e. Make the required changes to the record
f. Click Update button to save the changes made.

Refer Figure 62

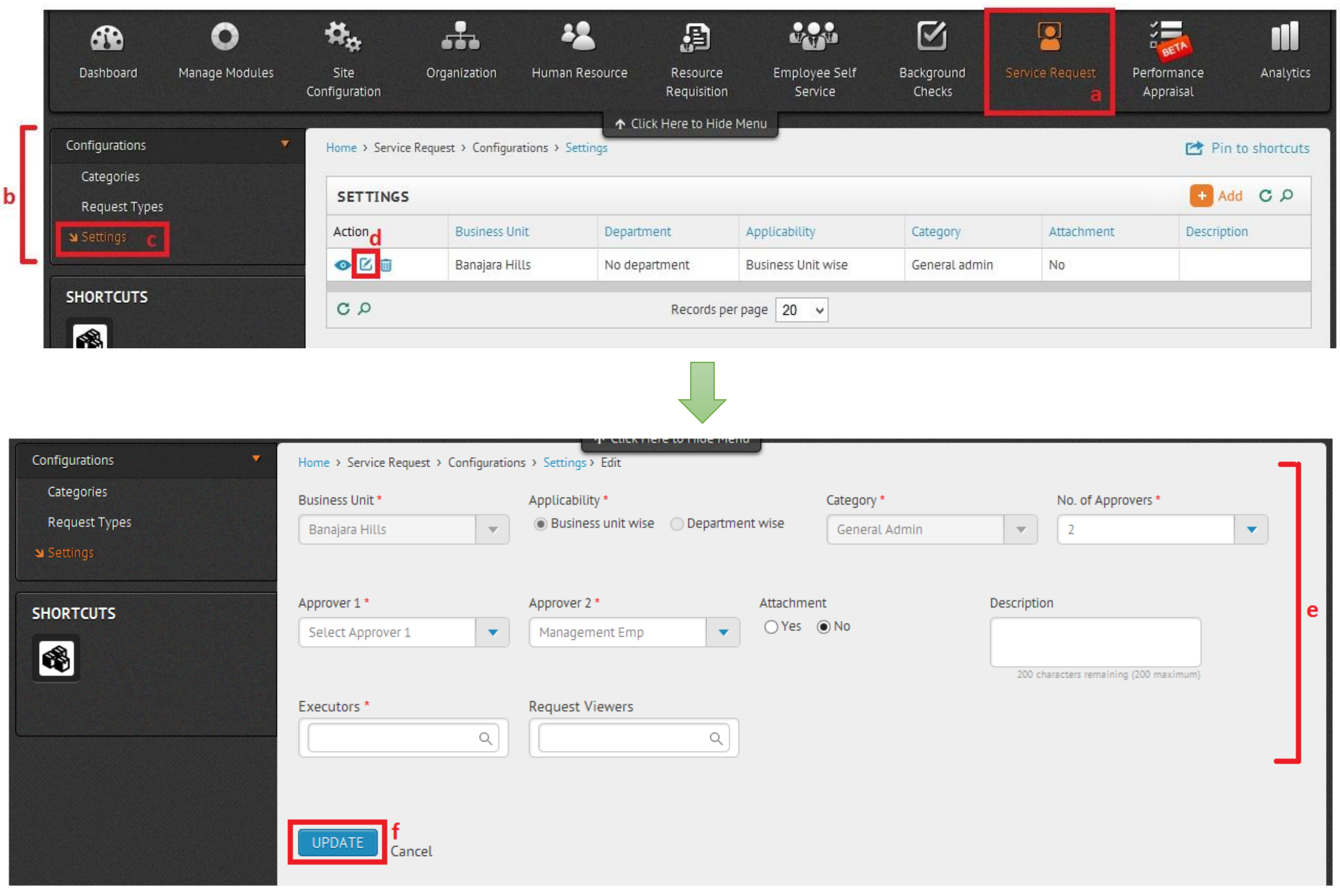


Figure 62

How to Delete Service Request:

a. Click on the Service Request in the top menu
b. The left side panel will display the submenus
c. Click on desired submenu
d. Click on Delete icon for the record that is to be deleted on the right side panel

Refer to Figure 63

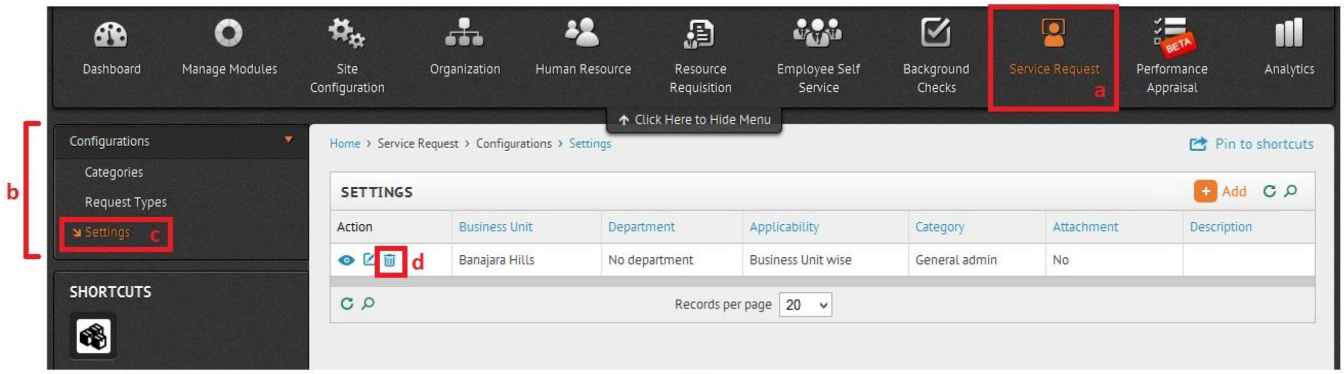


Figure 63

e. In the Confirmation pop up , Click on Yes to delete the record

Refer to Figure 64

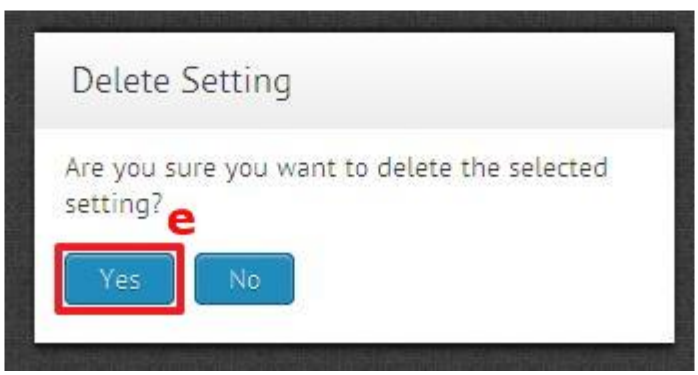


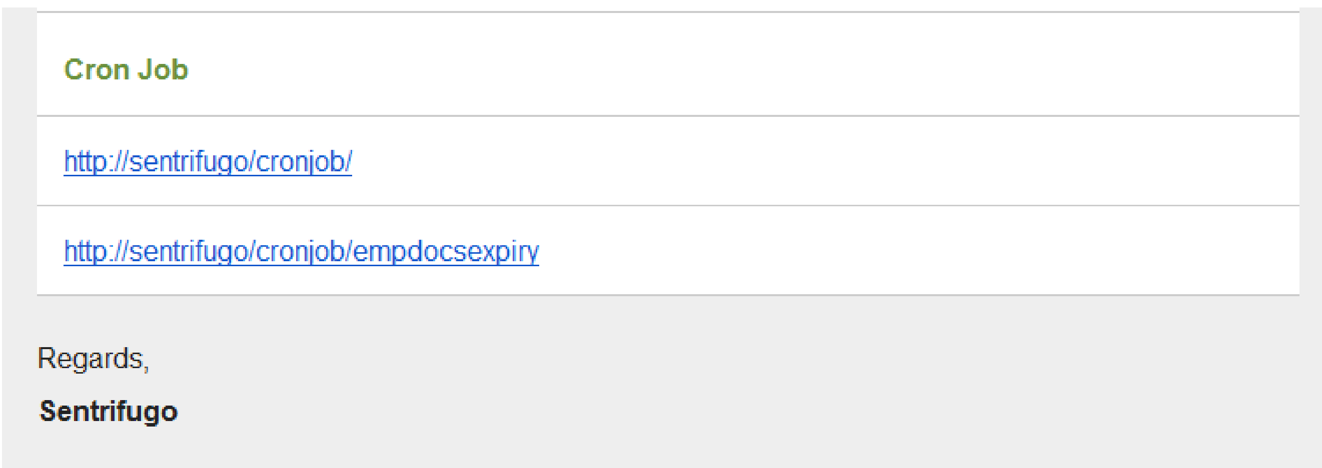
Figure 64

How do I set Cron Jobs:

You should have received an email upon successful installation of Sentrifugo.

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

Refer Figure 65


Cron Job

http://sentrifugo/cronjob/

http://sentrifugo/cronjob/empdocsexpiry

Regards,

Sentrifugo

Figure 65

How to Download Import Format

a. Click on Human Resources in the top menu
b. Click on Employees submenu on the left side panel
c. Click on Import Format link above the employee details grid on the right hand side
d. For further guidance, click on Help link

Refer to figure 66

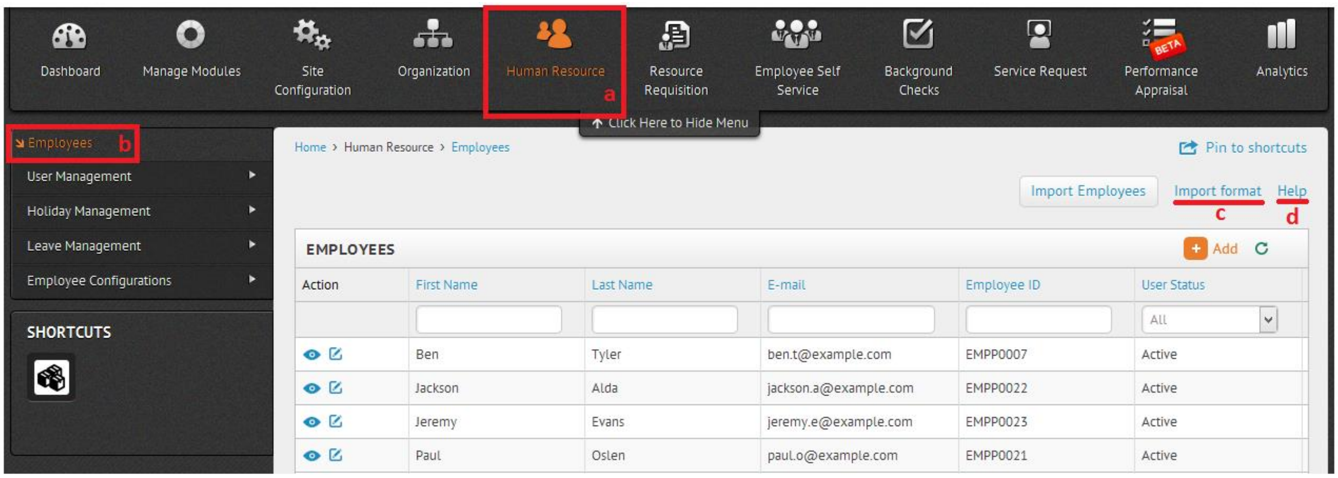


Figure 66

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

Refer Figure 67 for the import format

Figure 67

From where do I pick the Import format details

a. Prefix

I. Click on Site configurations in the top menu
II. Click on General submenu on the left side panel
III. Click on Prefixes link
IV. Add the required prefix by clicking on Add button
V. Use the Prefix to enter in the import excel

Refer Figure 68

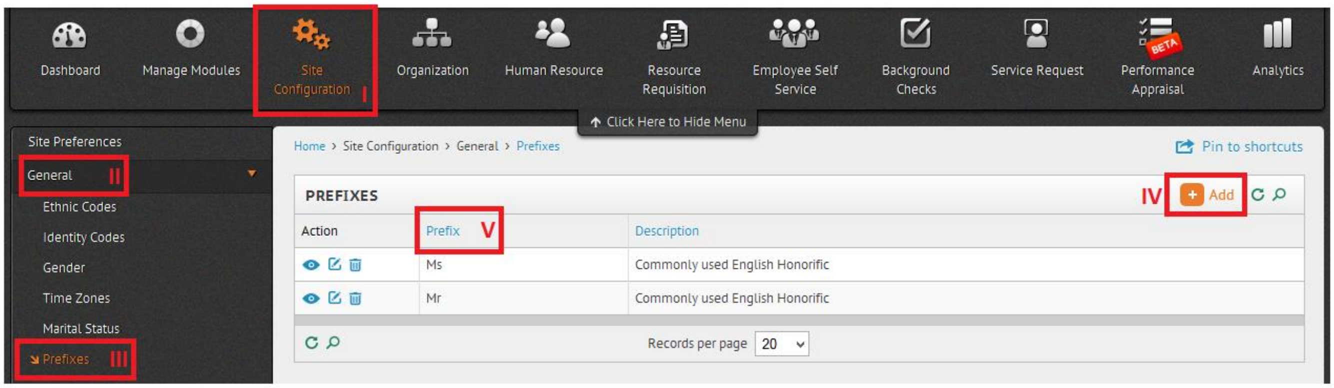


Figure 68

Note: You can only enter prefixes that are existing in the application.

b. Enter the First and Last Name of the employee

I. These fields are mandatory and accept only alphabetic characters

Refer Figure 69

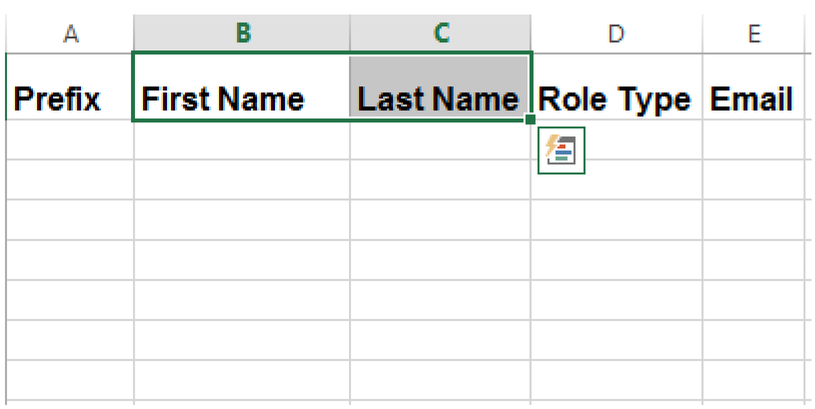


Figure 69

c. Role Type

I. Click on Human Resource in the top menu
II. Click on User Management submenu on the left side panel
III. Click on Roles & Privileges link
IV. Add the required roles and provide privileges to the role by clicking Add button
V. Use the Role Type to enter in the import excel

Refer Figure 70

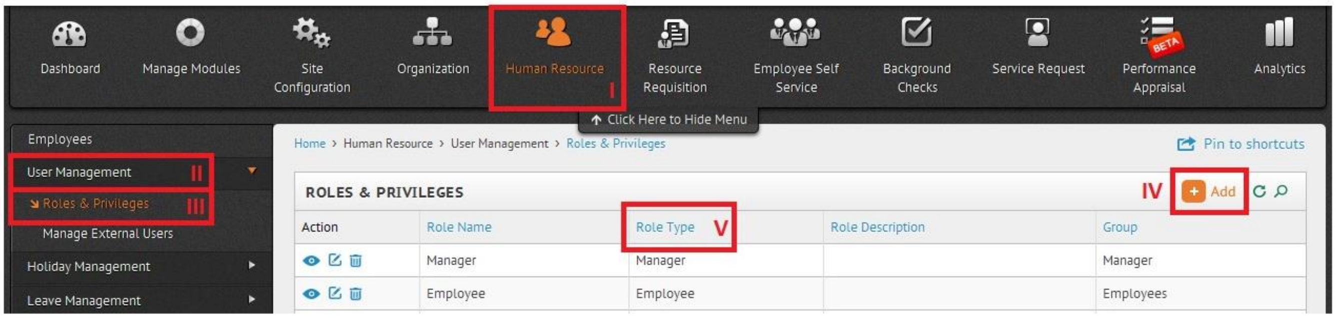


Figure 70

Note: You can only enter roles that are existing in the application

d. Enter the email of the employee

I. Email address should unique and of a valid format
II. Email field is mandatory

Refer figure 71

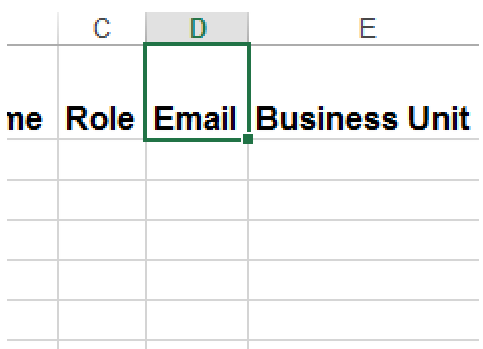


Figure 71

e. Business Unit

I. Click on Organization in the top menu
II. Click on Business Units in the left side panel
III. Click on Add button to add the desired business unit
IV. Use the Code to enter in the import excel

Refer Figure 72

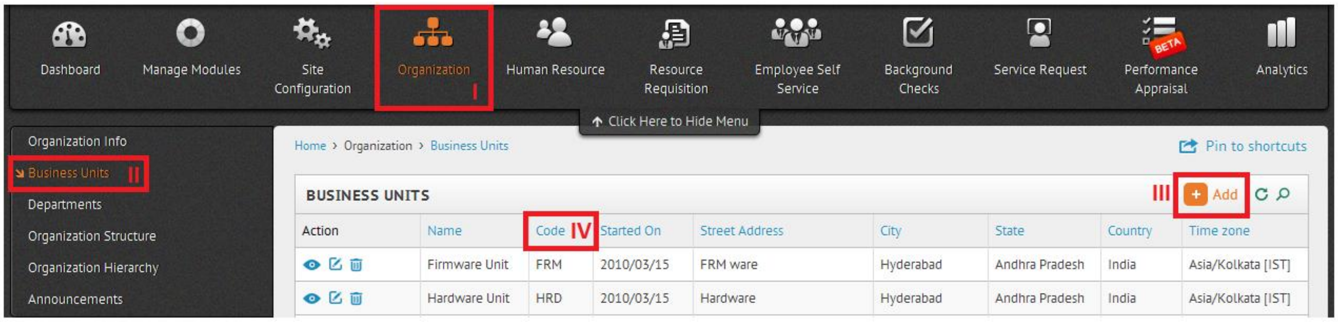


Figure 72

Note: You can only enter business units that are existing in the application

f. Departments

I. Click on Organization in the top menu
II. Click on Departments in the left side panel
III. Click on Add button to add the desired department
IV. Use the Code to enter in the import excel
V. Please make sure that Department should fall under the Business Unit entered in import excel

Refer Figure 73

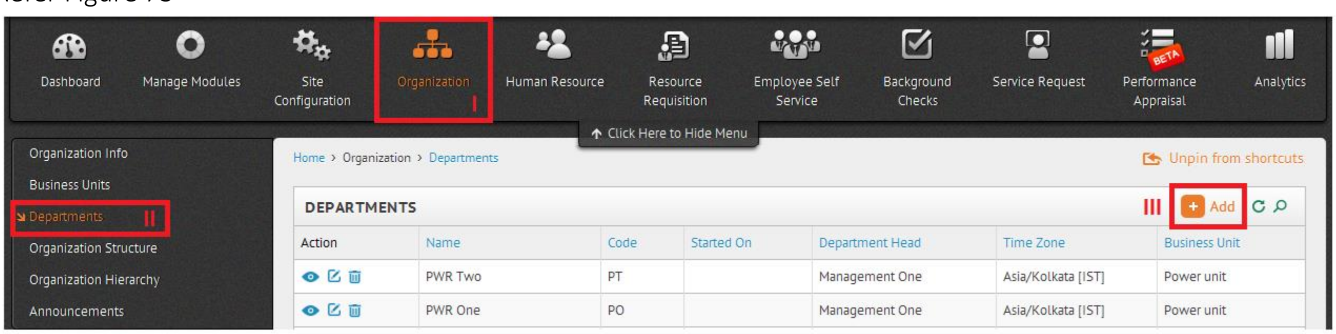


Figure 73

Note: You can only enter departments that are existing in the application

g. Enter the Reporting Manager employee id

h. Job Title

I. Click on Human Resource in the top menu
II. Click on Employee Configurations in the left side panel
III. Click on Job Titles link
IV. Click on Add button to add the desired job title
V. Use the Job Title Code to enter in the import excel

Refer Figure 74

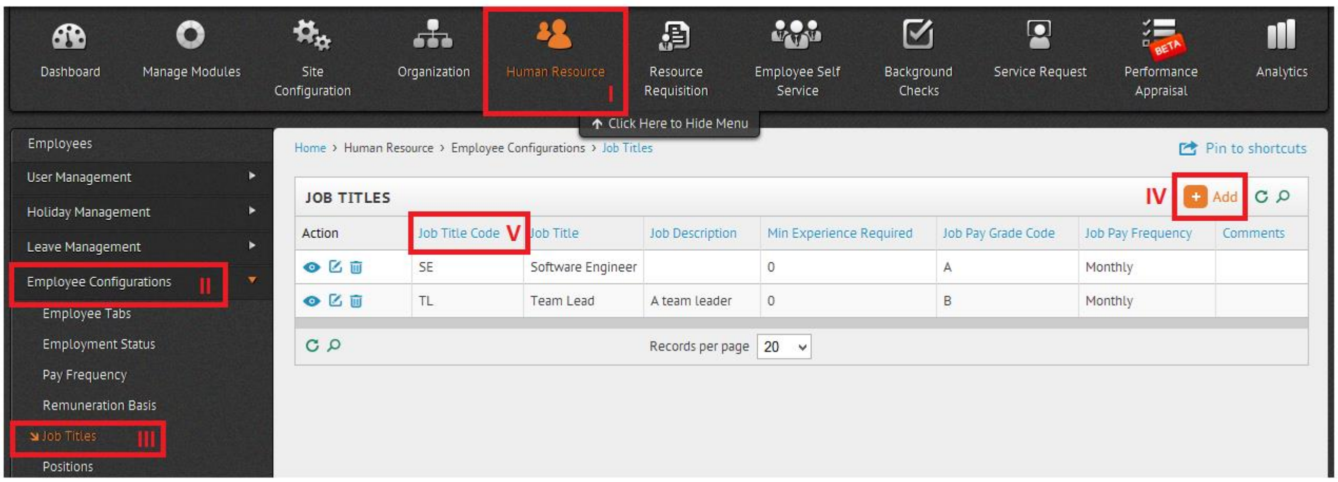


Figure 74

Note: You can only enter job titles that are existing in the application

i. Position

I. Click on Human Resource in the top menu
II. Click on Employee Configurations in the left side panel
III. Click on Positions link
IV. Click on Add button to add the desired position
V. Use the Position to fill in the import excel
VI. Please make sure that Position should fall under the Job Titles entered in import excel

Refer Figure 75

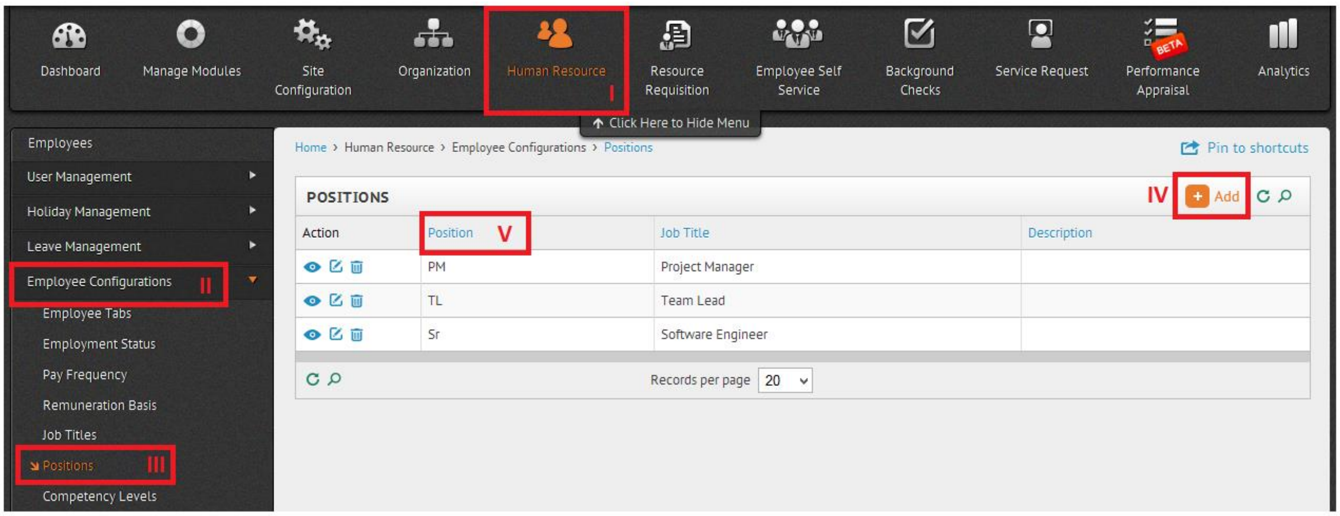


Figure 75

Note: You can only enter positions that are existing in the application

j. Employment Status

I. Click on Human Resource in the top menu
II. Click on Employee Configurations in the left side panel
III. Click on Employment Status
IV. Click on Add button to add the desired status
V. Use the Work Short Code to enter in the import excel

Refer Figure 76

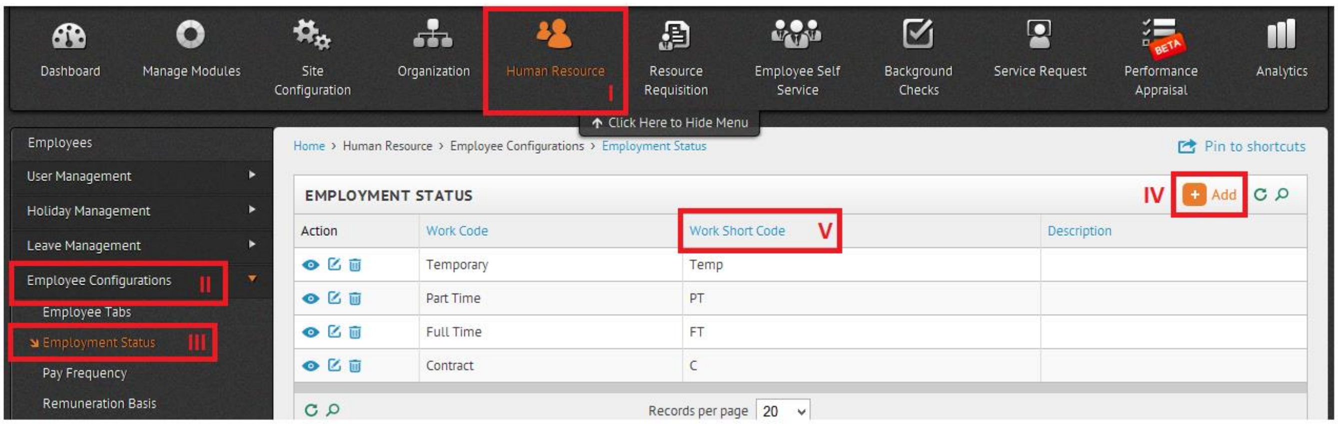


Figure 76

Note: You can only enter work short codes that are existing in the application

k. Enter the employee Date of Joining in “Day, month and four digit year with dashes” format

I. This is a mandatory field

Refer Figure 77 for guidance

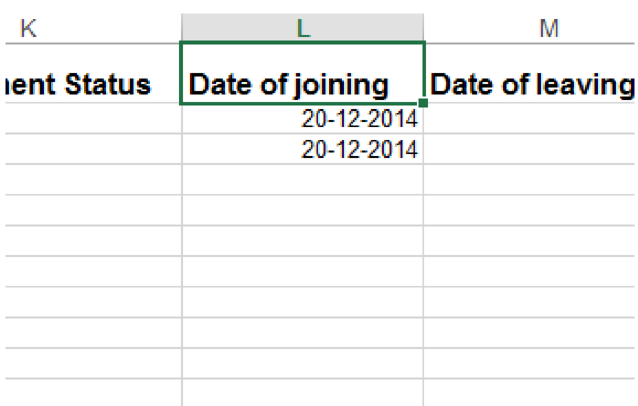


Figure 77

l. Enter the employee Date of Leaving

I. Date of Leaving column can be left empty unless the employee Employment status is "Left", "Suspended", or "Resigned"

II. Date of Leaving must be greater than the Date of Joining

Refer Figure 78

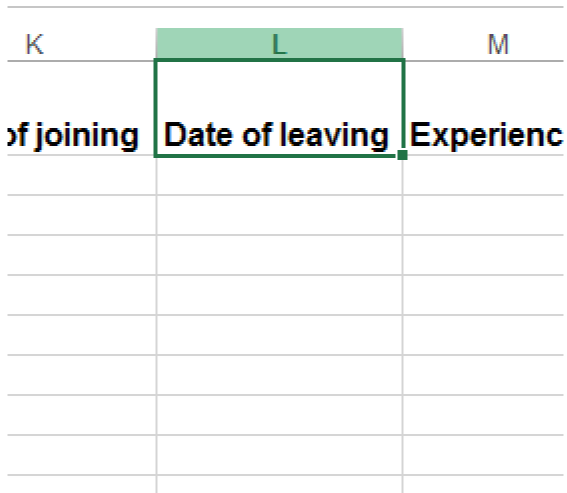


Figure 78

m. Enter the employee Experience

I. This field is not mandatory

Refer Figure 79

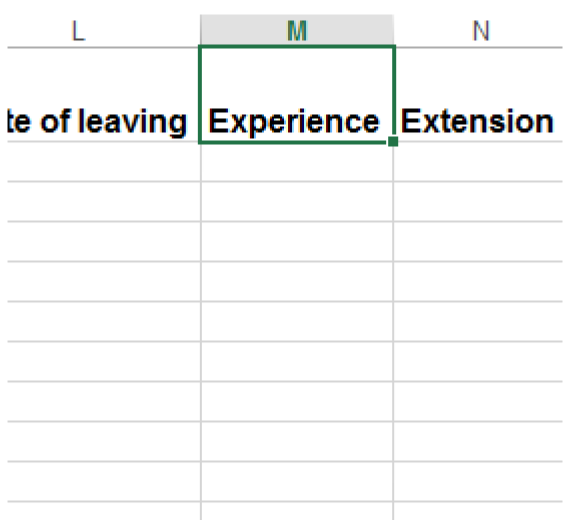


Figure 79

n. Enter the employee Extension

I. This field is not mandatory

Refer Figure 80

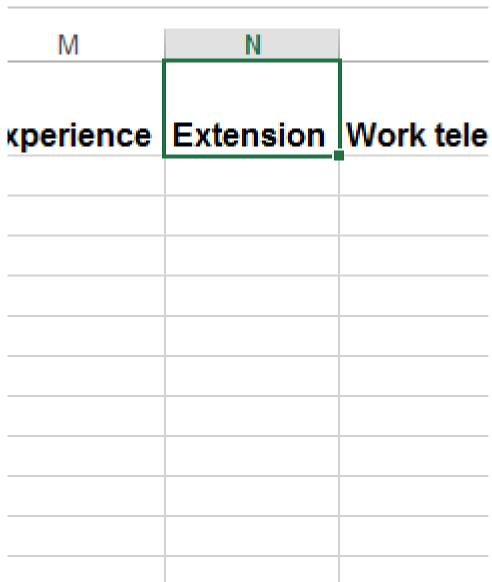


Figure 80

o. Enter the employee Work Telephone Number

I. This field is not mandatory

Refer Figure 81

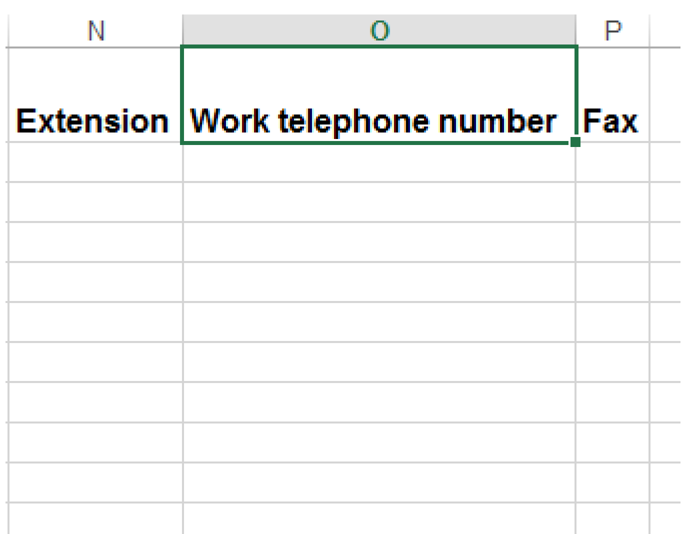


Figure 81

p. Enter the employee Fax

I. This field is not mandatory

Refer Figure 82

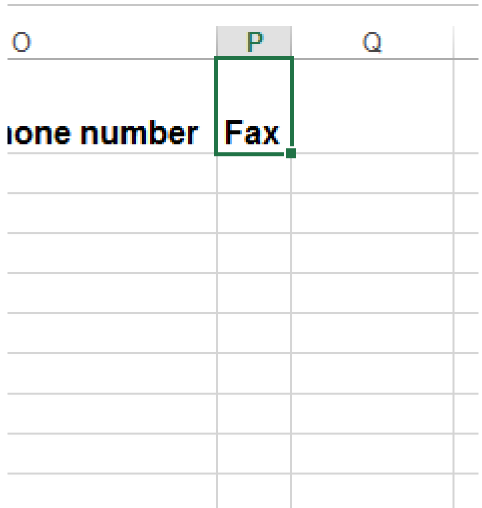


Figure 82

q. Salary Currency

I. Click on Site Configurations in the top menu
II. Click on Currency in the left side panel
III. Click on Currencies
IV. Click on Add button to add the desired status
V. Use the Currency Code to enter in the import excel

Refer Figure 83

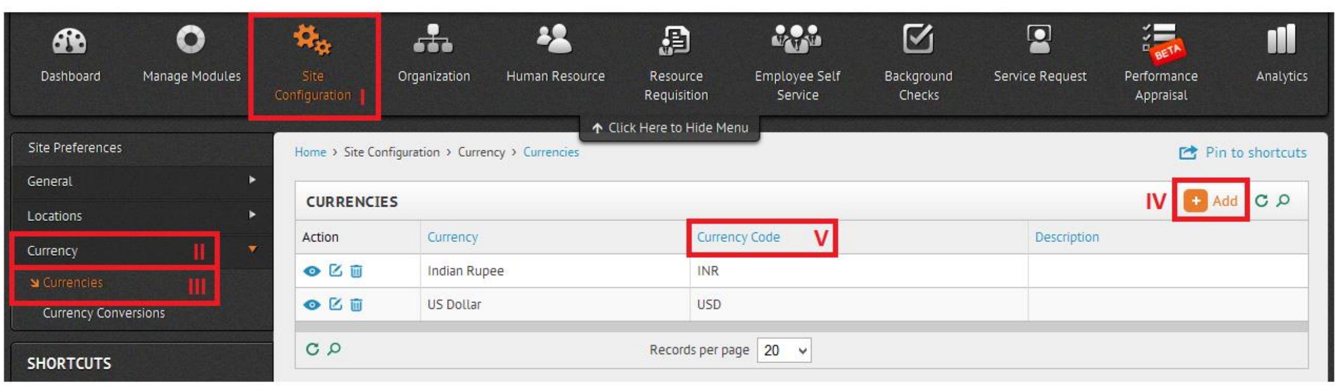


Figure 83

Note: You can only enter Currencies that are existing in the application

r. Pay Frequency

I. Click on Human Resource in the top menu
II. Click on Employee Configurations in the left side panel
III. Click on Payment Frequency
IV. Click on Add button to add the desired status
V. Use the Short Code to enter in the import excel

Refer Figure 84

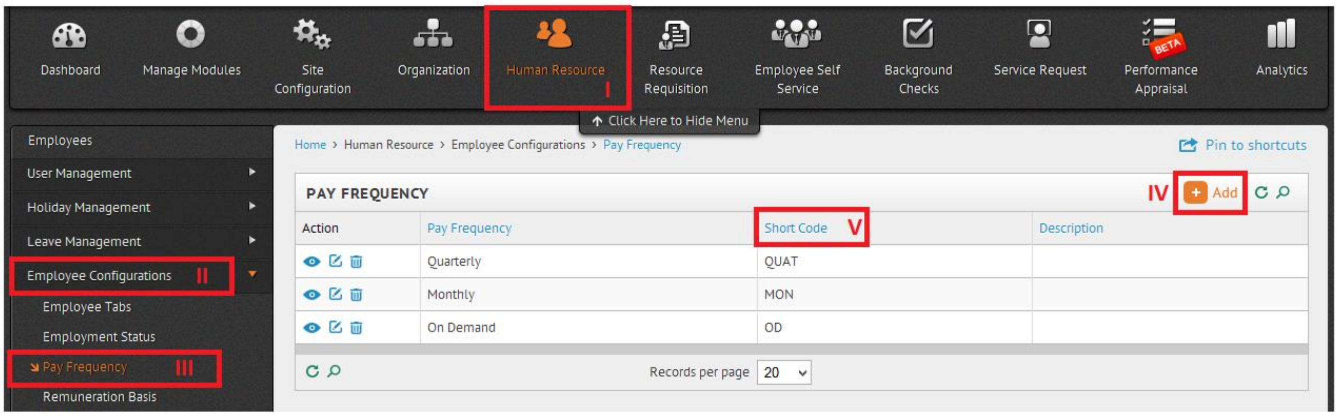


Figure 84

Note: You can only enter Pay Frequencies that are existing in the application

s. Enter the employee Salary

I. This field is not mandatory

Refer Figure 85

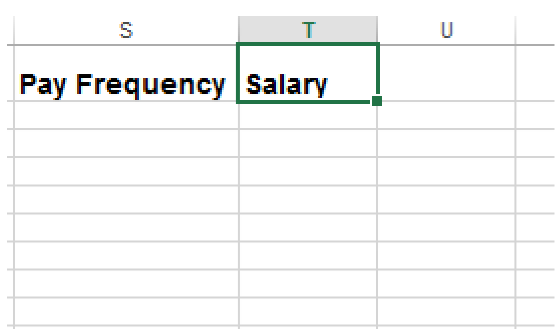


Figure 85

Performance Appraisal

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

In Sentrifugo, the appraisal is configured for an entire business unit or for a specific department in a business unit.

To configure the appraisal process, first the appraisal settings for the selected business unit or department must be configured.

Appraisal Settings

Appraisal Settings set the mode and ratings for the selected business unit or department. The appraisal mode can be quarterly, half yearly, or yearly. The ratings can be 1-5 or 1-10 depending on the appraisal architecture of the organization. Ratings are provided with description signifying each ratings definition in the appraisal process.

a. Click on Performance Appraisal in the header
b. Click on Configurations on the left side panel
c. Click on Appraisal Settings submenu
d. Click on Add in the right side panel

Refer Figure 86

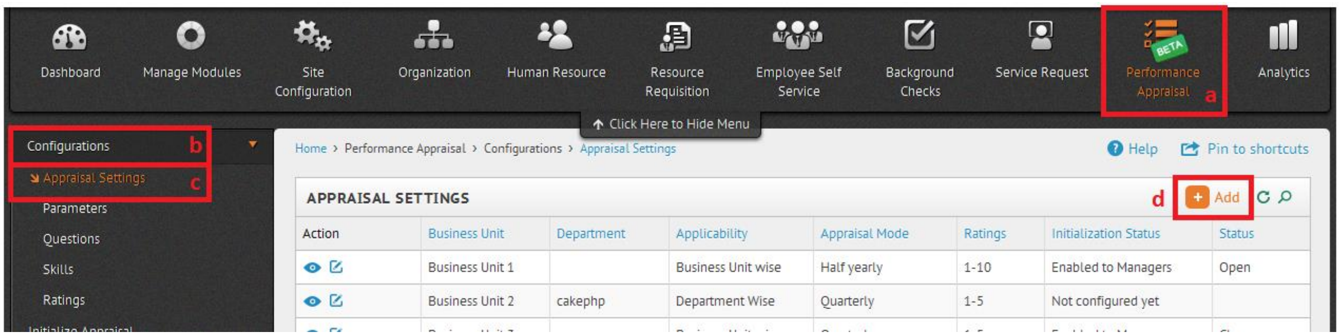


Figure 86

In Add Appraisal Settings screen,

e. Select an option in Business Unit dropdown
f. Select the applicability
g. Select the department based on the previous selections
h. Select an option in Appraisal Mode dropdown
i. Select an option in Appraisal Ratings dropdown
j. Click on Save to save the Appraisal Settings

Refer Figure 87

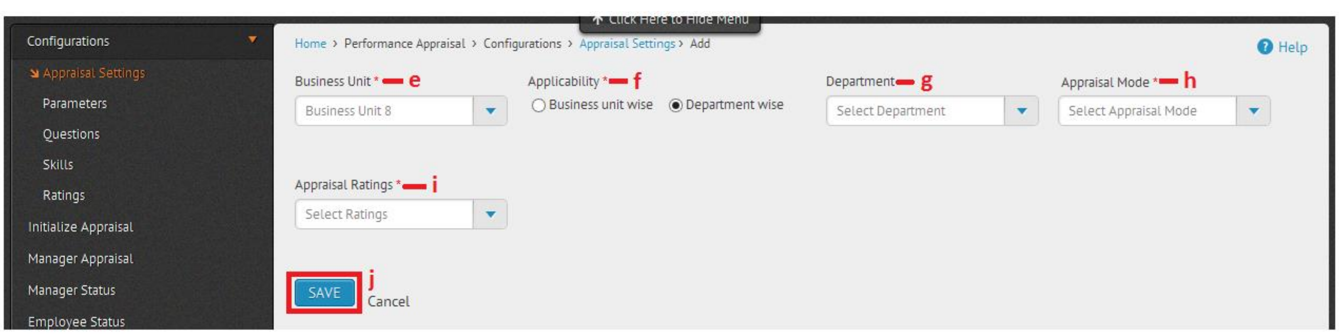


Figure 87

Parameters

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

a. Click on Performance Appraisal in the header
b. Click on Configurations on the left side panel
c. Click on Parameters submenu
d. Click on Add in the right side panel

Refer Figure 88

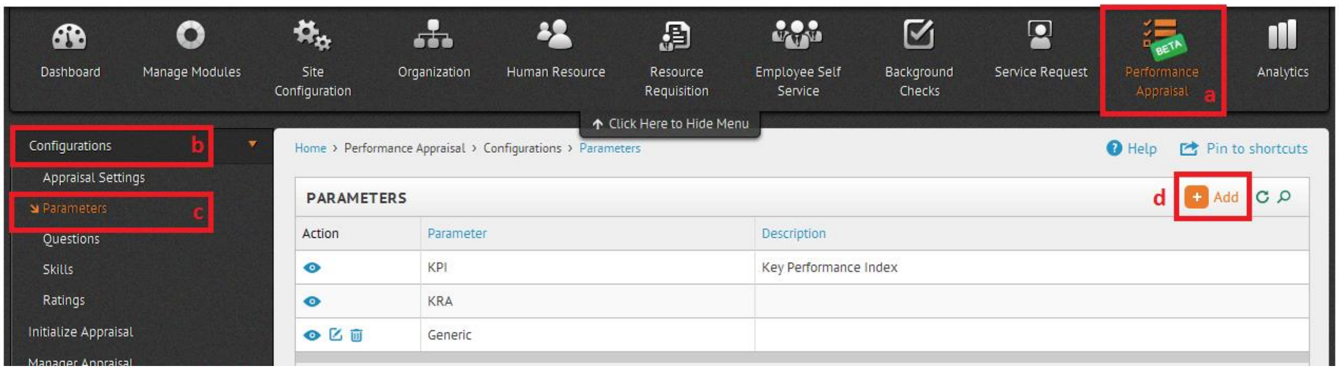


Figure 88

In the Add Parameters screen,

e. Enter the parameter
f. Provide description if necessary
g. Click on Save to add the parameter

Refer Figure 89

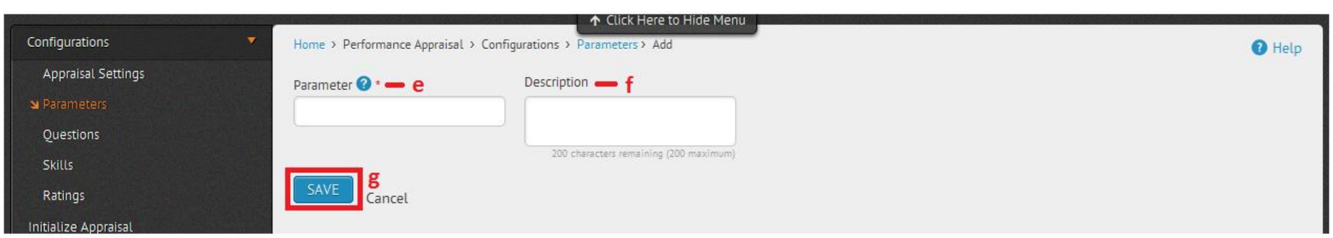


Figure 89

Questions

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

a. Click on Performance Appraisal in the header
b. Click on Configurations on the left side panel
c. Click on Questions submenu
d. Click on Add in the right side panel

Refer Figure 90

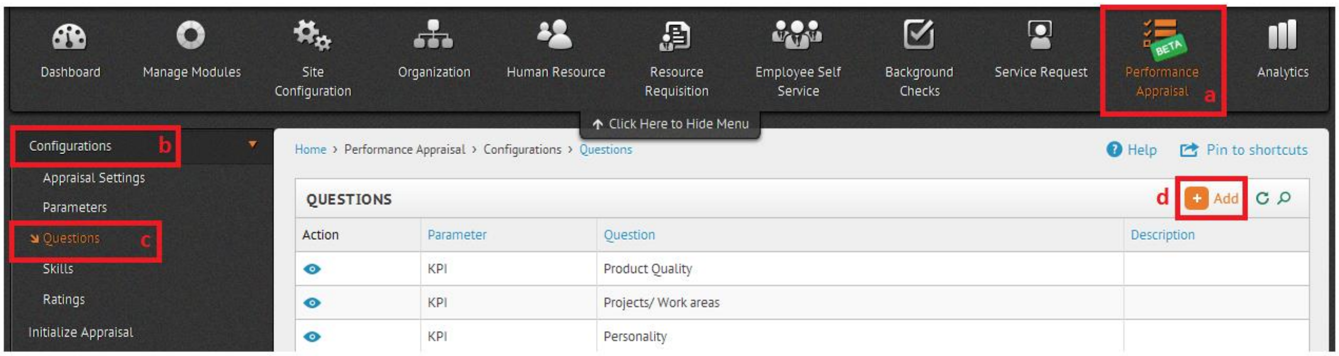


Figure 90

In the Add Questions screen,

e. Select an option from the parameters dropdown
f. Add other parameter by clicking Add Parameter
g. Enter the question
h. Provide description if necessary
i. Click on "Add New Question" to add questions for the selected parameter
j. Click on Save to add questions for the selected parameter

Refer Figure 91

Figure 91

Skills

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

a. Click on Performance Appraisal in the header
b. Click on Configurations on the left side panel
c. Click on Skills submenu
d. Click on Add in the right side panel

Refer Figure 92

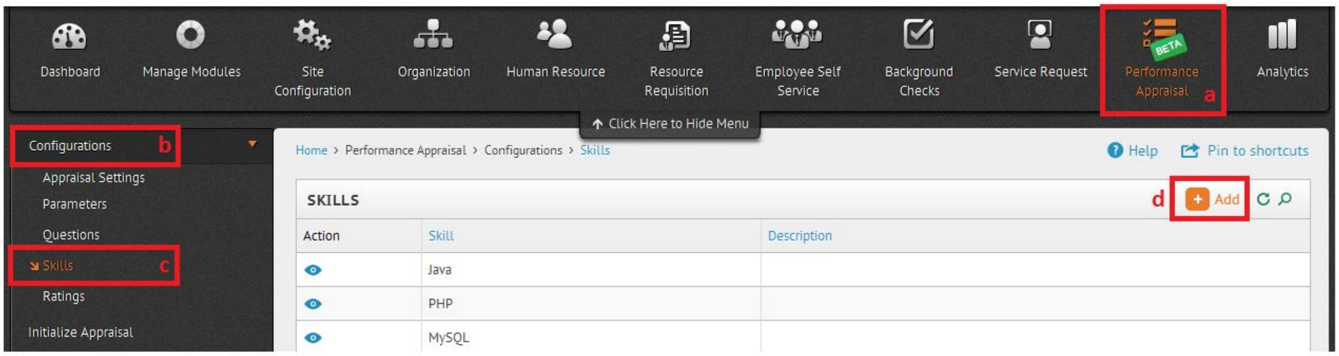


Figure 92

In the Add Skills screen,

e. Enter the skill
f. Provide description if necessary
g. Click on Save to add the skill

Refer Figure 93

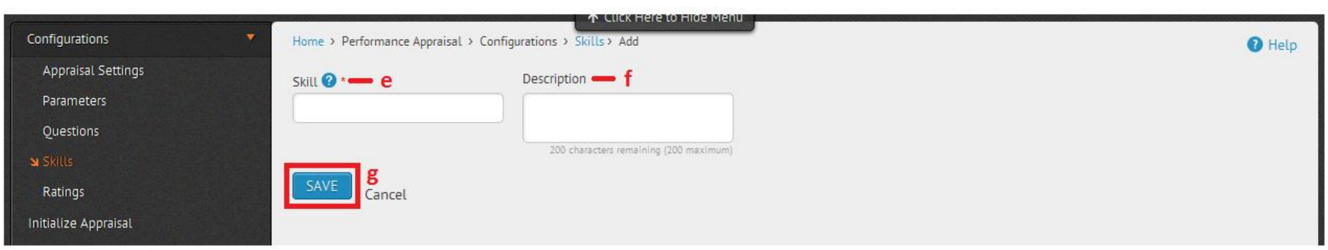


Figure 93

Ratings

Ratings are defined for each business unit or department for which the appraisal settings are previously configured. The rating scale, 1-5 and 1-10, is decided as per the standards of the organization for appraisal process.

a. Click on Performance Appraisal in the header
b. Click on Configurations on the left side panel
c. Click on Ratings submenu
d. Click on Add in the right side panel

Refer Figure 94

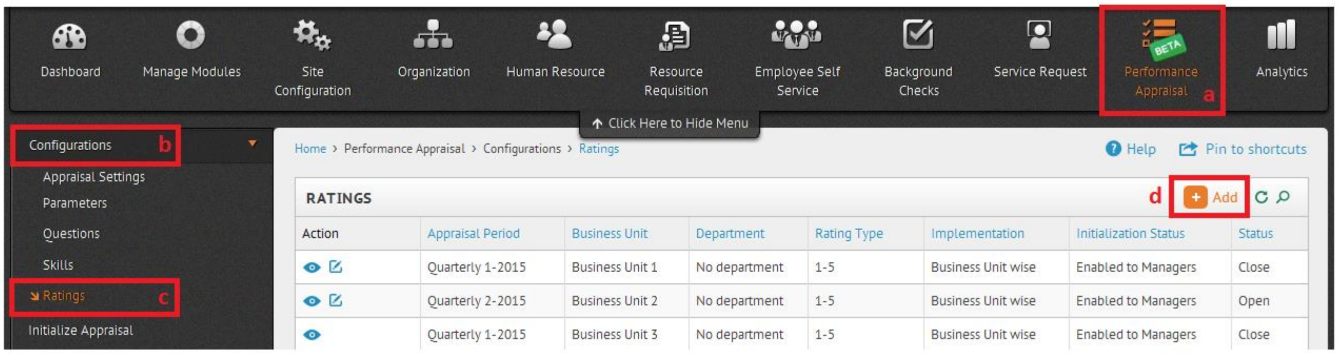


Figure 94

In the Add ratings screen,

e. Select an option from Business Unit dropdown
f. Select an option from Department dropdown
g. The Appraisal Ratings range selected in Appraisal Settings for the selected Business Unit and Department are auto populated
h. Provide rating text for each rating value
i. Click on Save to add the ratings

Refer Figure 95

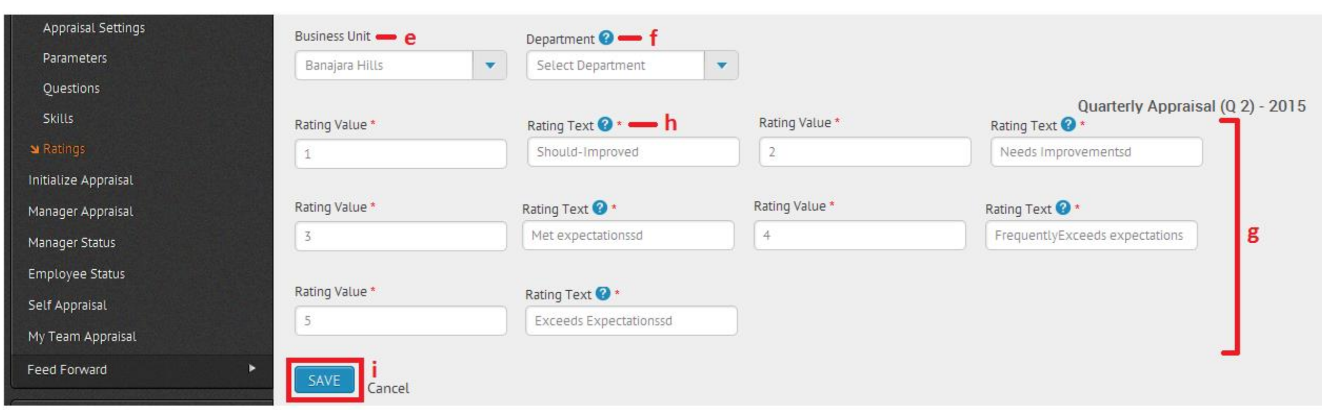


Figure 95

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

Initialize Appraisal

In the initialization step, the business units or the departments that have their appraisal settings configured will be displayed.

- Business unit: All the Business Units which have the Appraisal Settings configured will be displayed
- Frequency: Based on the appraisal settings for the selected business unit, frequency will be auto populated
- Period: Period will be calculated dynamically based on the previously configured appraisal for the selected business unit
- Appraisal Status: Appraisal status will be "Open" by default. Upon the initialization of appraisal, close and force close options will be made available
    - Force Close: Closes the Appraisal Process by force. Appraisal Process for the selected Business Unit can be configured again and for the same appraisal period
    - Close: Closes the appraisal process for the selected business unit permanently
- Enable to: The Appraisal Process will be enabled by default to managers. When the settings ae saved, the Appraisal Process will be made available for managers to configure the questions under the selected parameters. If the appraisal is directly made available for the employees, they will be able to view the questions configured by the HR.
- Due Date: The due date is for closing the appraisal process for managers or employees
- Consider Management: To consider management group for appraisal process for the selected period, check the respective checkbox
- Eligibility: Select the employees eligible for appraisal period based on the employee status
- Parameters: Select the parameters for appraisal process that will be applicable to the employees
- Ratings : The ratings configured in appraisal setting for a business unit or department will be auto-populated

a. Click on Performance Appraisal in the header
b. Click on Initialize Appraisal in the left side panel
c. Click on Add in the right side panel

Refer Figure 96

Figure 96

In the Add Initialize Appraisal screen,

d. All the business units for which the appraisal settings are configured are populated. Select an option from business unit dropdown
e. Select an option from the department dropdown
f. Based on the selected business unit and department, the appraisal mode is populated
g. Select the year range
h. Period will be dynamically calculated and populated
i. Appraisal Status is by default Open in Initialize appraisal
j. Select an option in Enable To dropdown
k. Based on the Enable To option, set a due date to the employees or to managers
l. Select more than one eligibility criteria for employees who are eligible for the appraisal process
m. Select more than one parameters
n. Ratings will be auto populated
o. Click on Save to initialize appraisal for a business unit or a department

Refer Figure 97

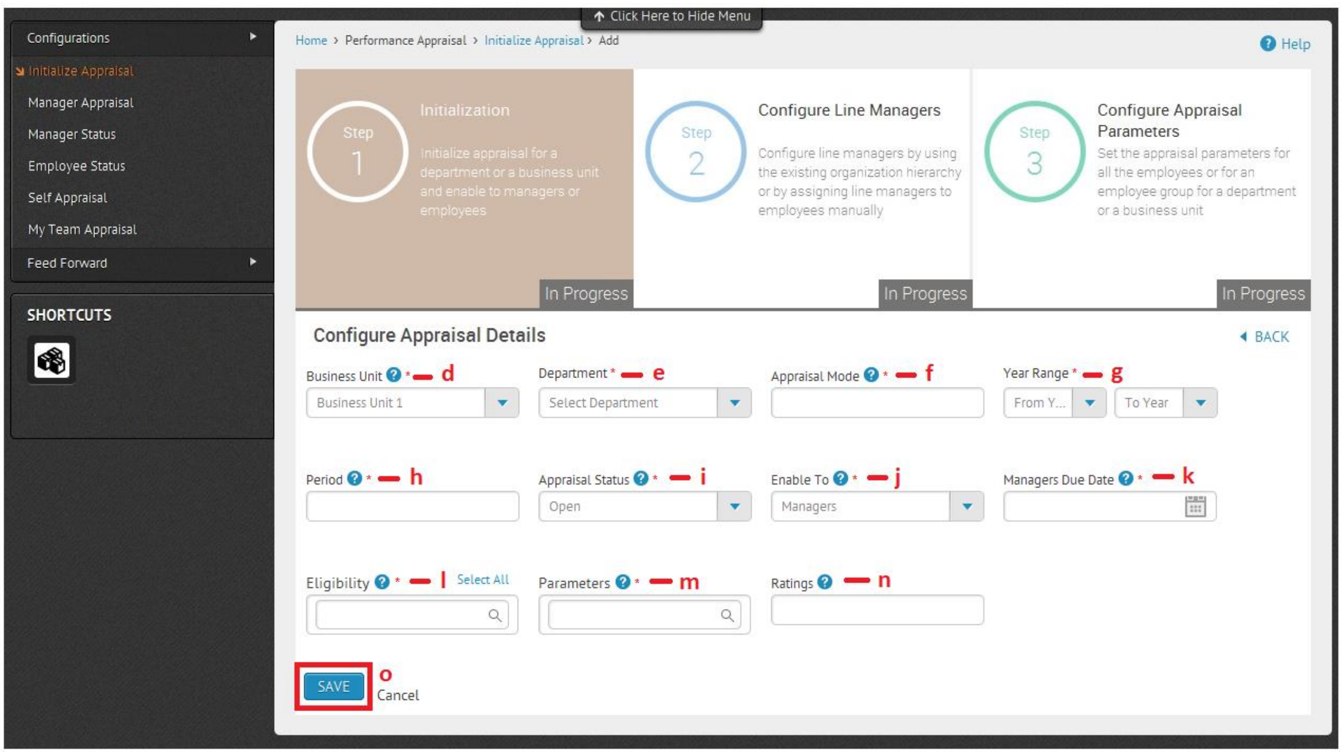


Figure 97

Configure Line Managers

Once the appraisal process is initiated for a department or a business unit, the line managers must be configured so as to evaluate the employees' appraisal.

The Line Managers can be configured in the appraisal process in two ways:

1. Choose by Organization Hierarchy
    - Establish appraisal process as per the organization hierarchy where line manager will be same as the reporting manager
    - 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

a. Click on Choose by Organization Hierarchy
b. Click Yes in the Confirmation alert box

Refer Figure 98

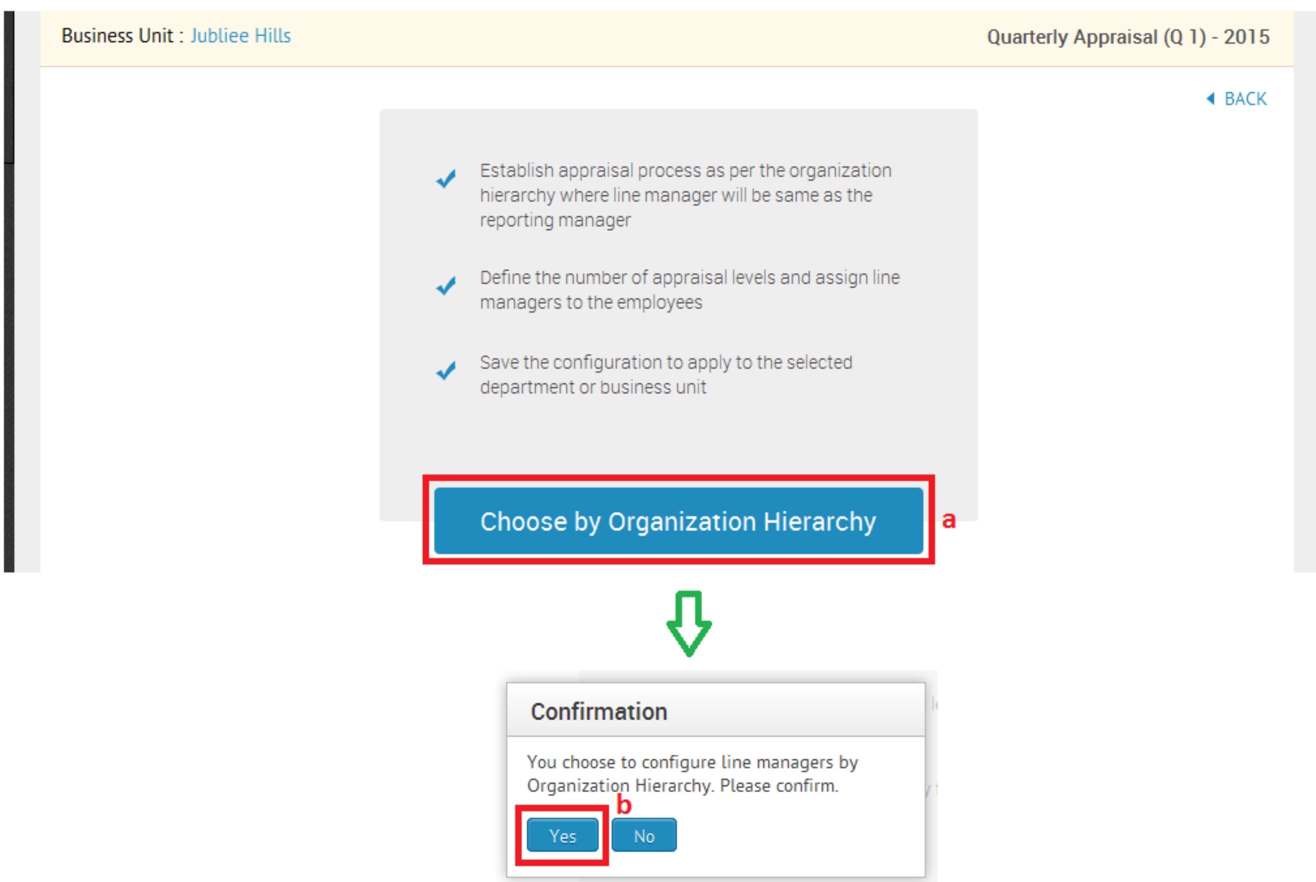


Figure 98

c. Manager and the employees under the manager are displayed
d. On the right side, configure line managers by selected the number of appraisal levels
e. Click on Save

Refer Figure 99

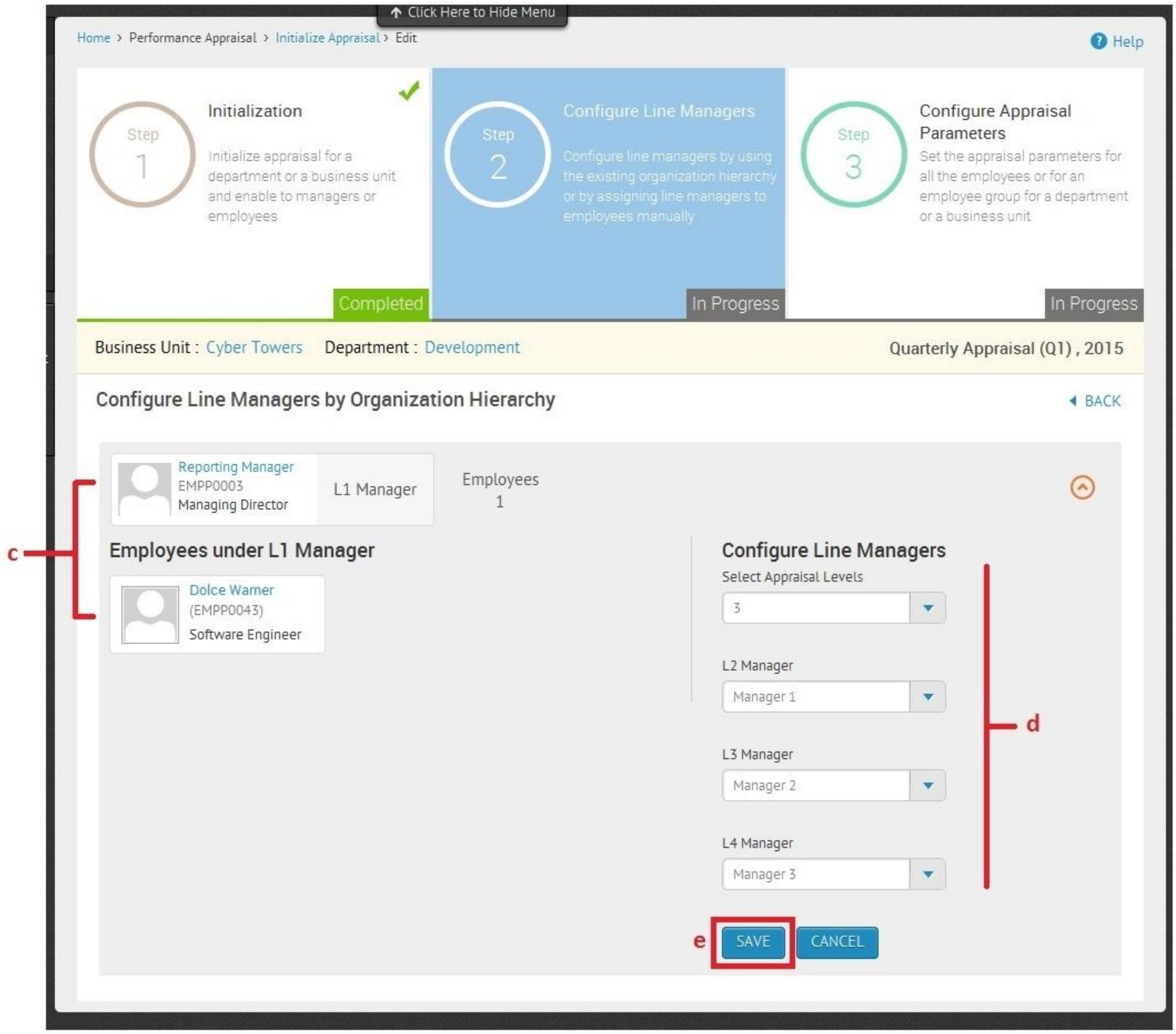


Figure 99

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

a. Click on Assign Line Managers to Employees
b. Click Yes in the Confirmation alert box

Refer Figure 100

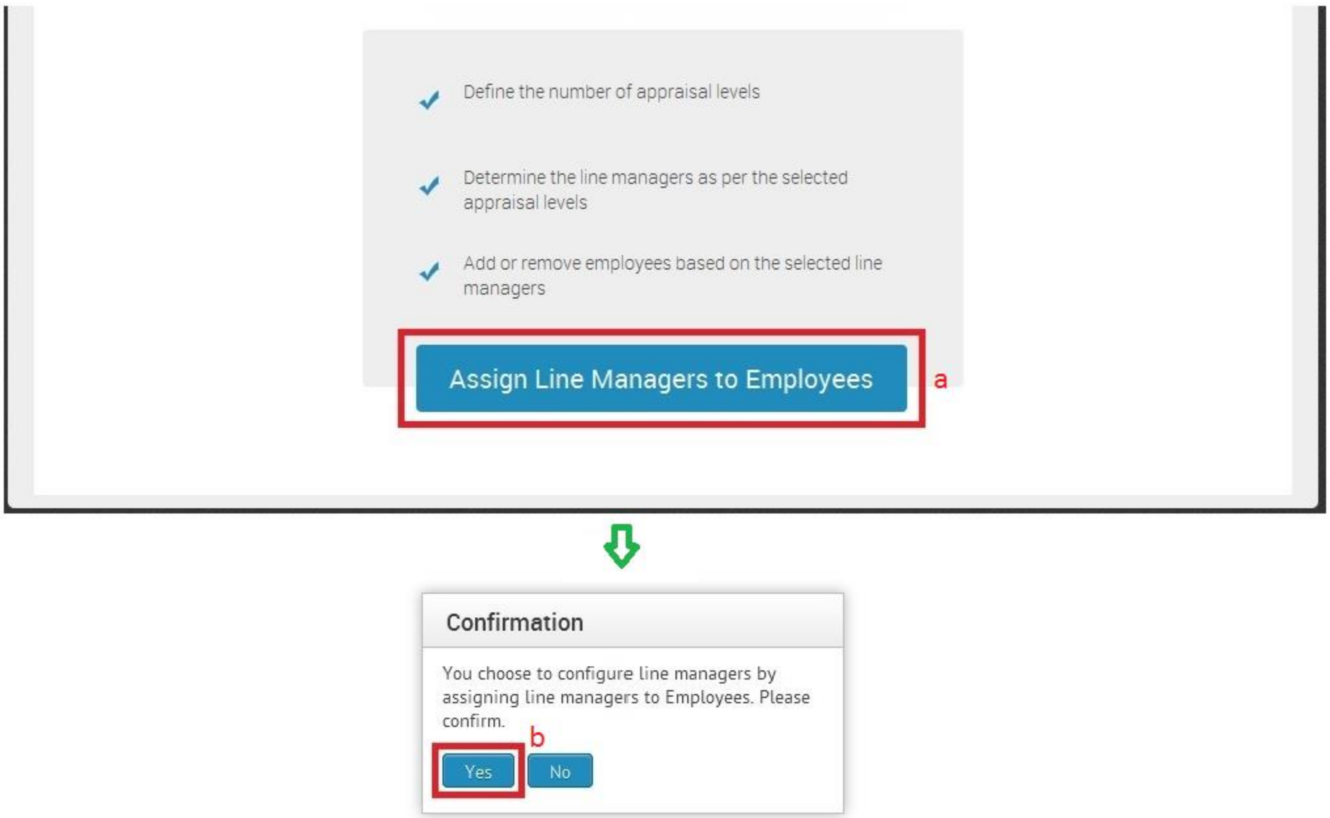


Figure 100

c. Click on Add Managers link
d. Select the number of appraisal levels
e. Based on the number of appraisal levels, select the line managers
f. Employees are displayed in the left side panel
g. Click on the employee to select for appraisal process
h. Click on Save

Refer Figure 101

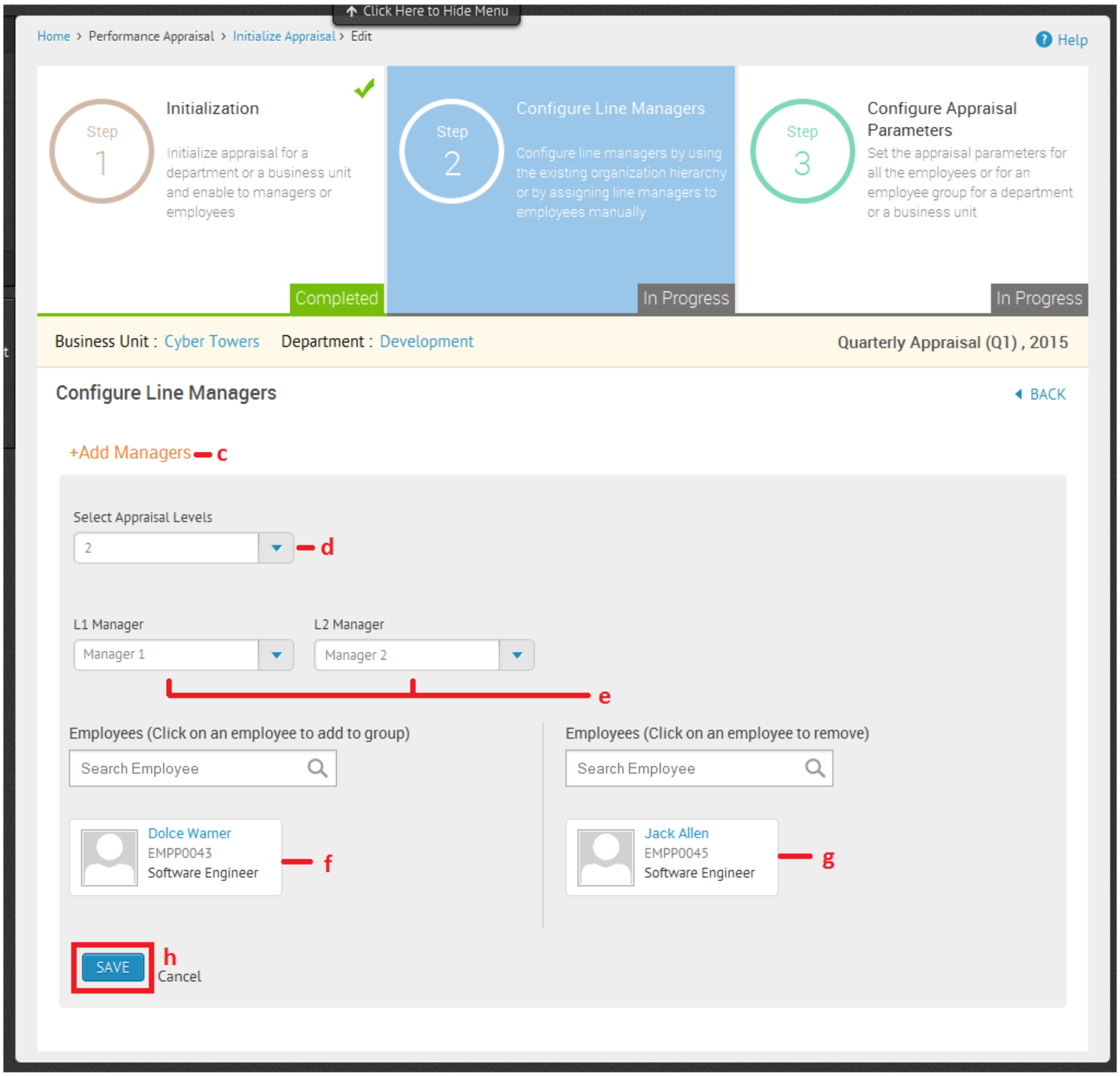


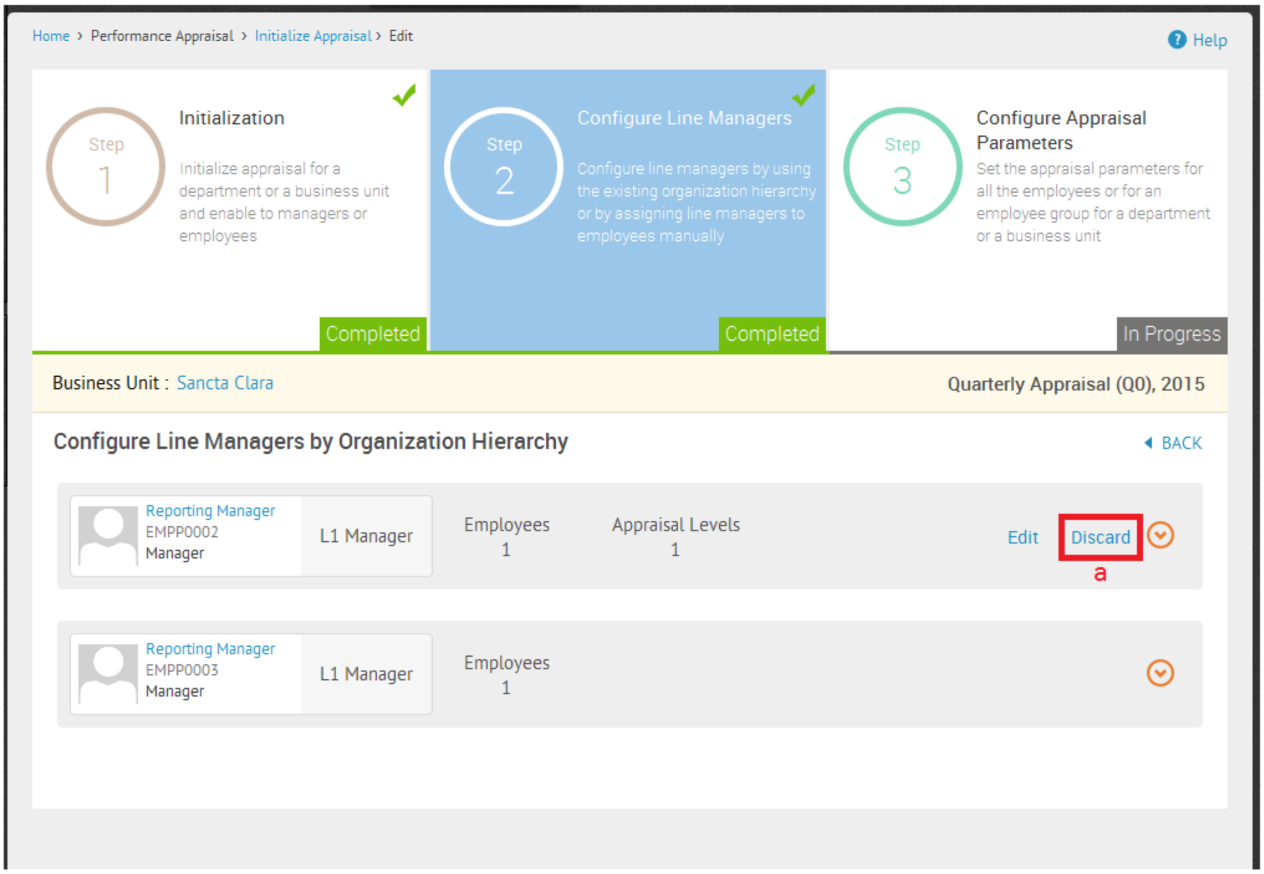
Figure 101

Discard Line Manager Configuration

You can discard the line managers' configuration after saving the appraisal process in step two.

a. Click on Discard to discard the line manager configurations

Refer Figure 102



OR

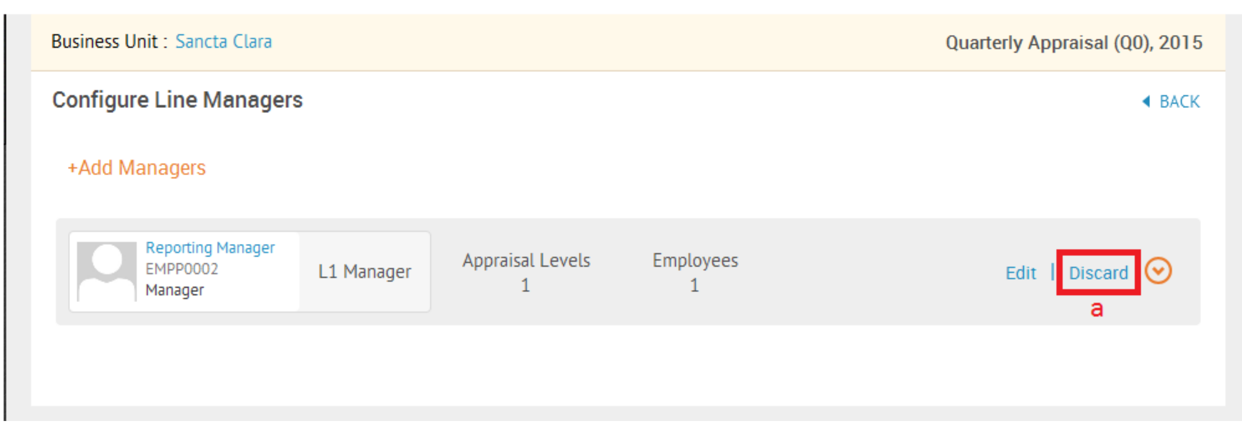


Figure 102

Configure Appraisal Parameters

Configure the appraisal parameters after configuring the line managers. Here, the appraisal process can be made applicable to employees. 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

a. Click on Assign Line Managers to Employees
b. Click Yes in the Confirmation alert box

Refer Figure 103

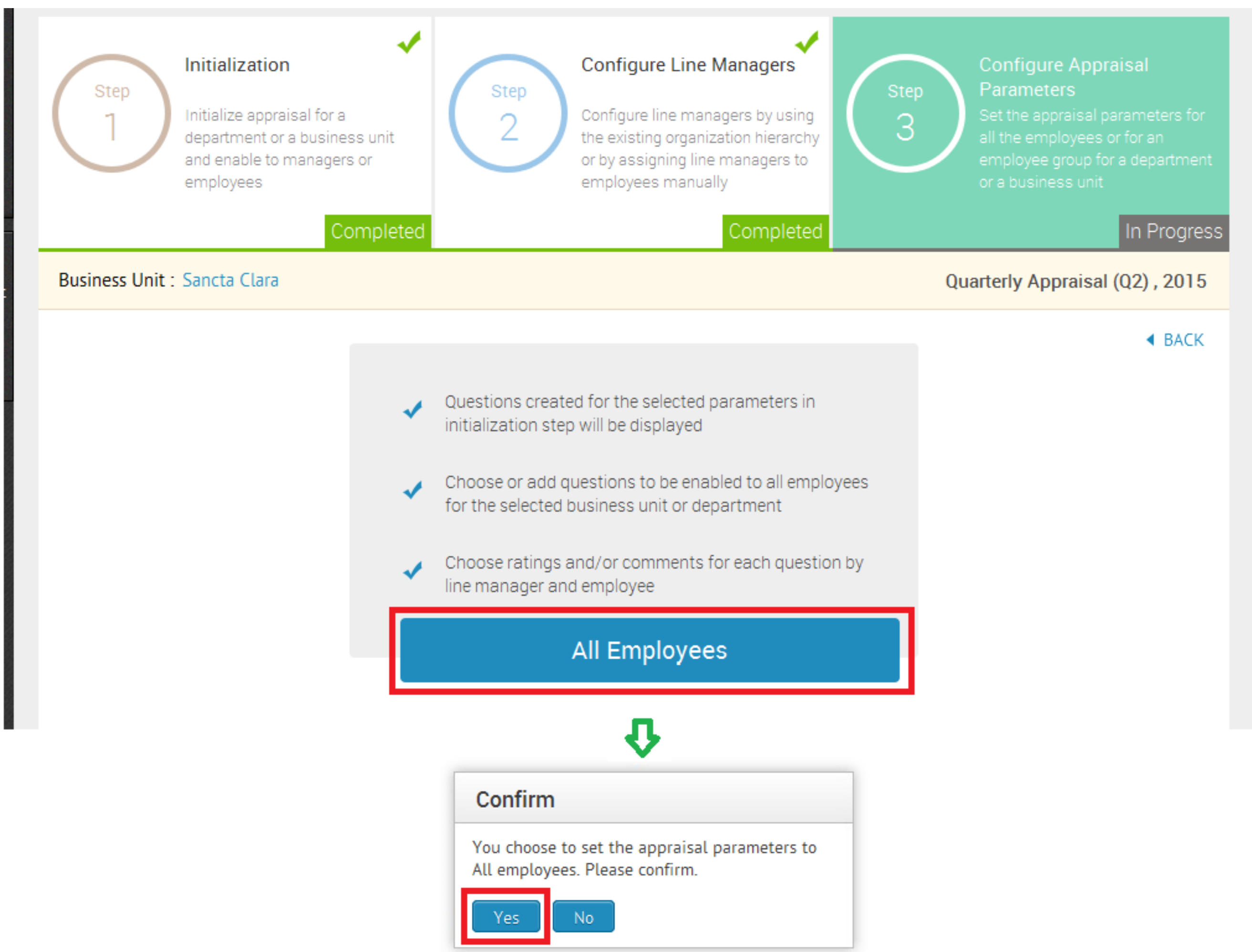


Figure 103

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. Select ratings or comments of manager or employee individually for all the questions
   Or
f. Select ratings or comments of manager or employee by checking the Manager Rating, Manager Comments, Employee Ratings and Employee Comments
g. Click on Add New Question to add more questions to the appraisal process
h. Click on Save & Initialize to initialize the appraisal
   Or
i. Click on Save & Initialize Later to only save the appraisal process

Refer Figure 104

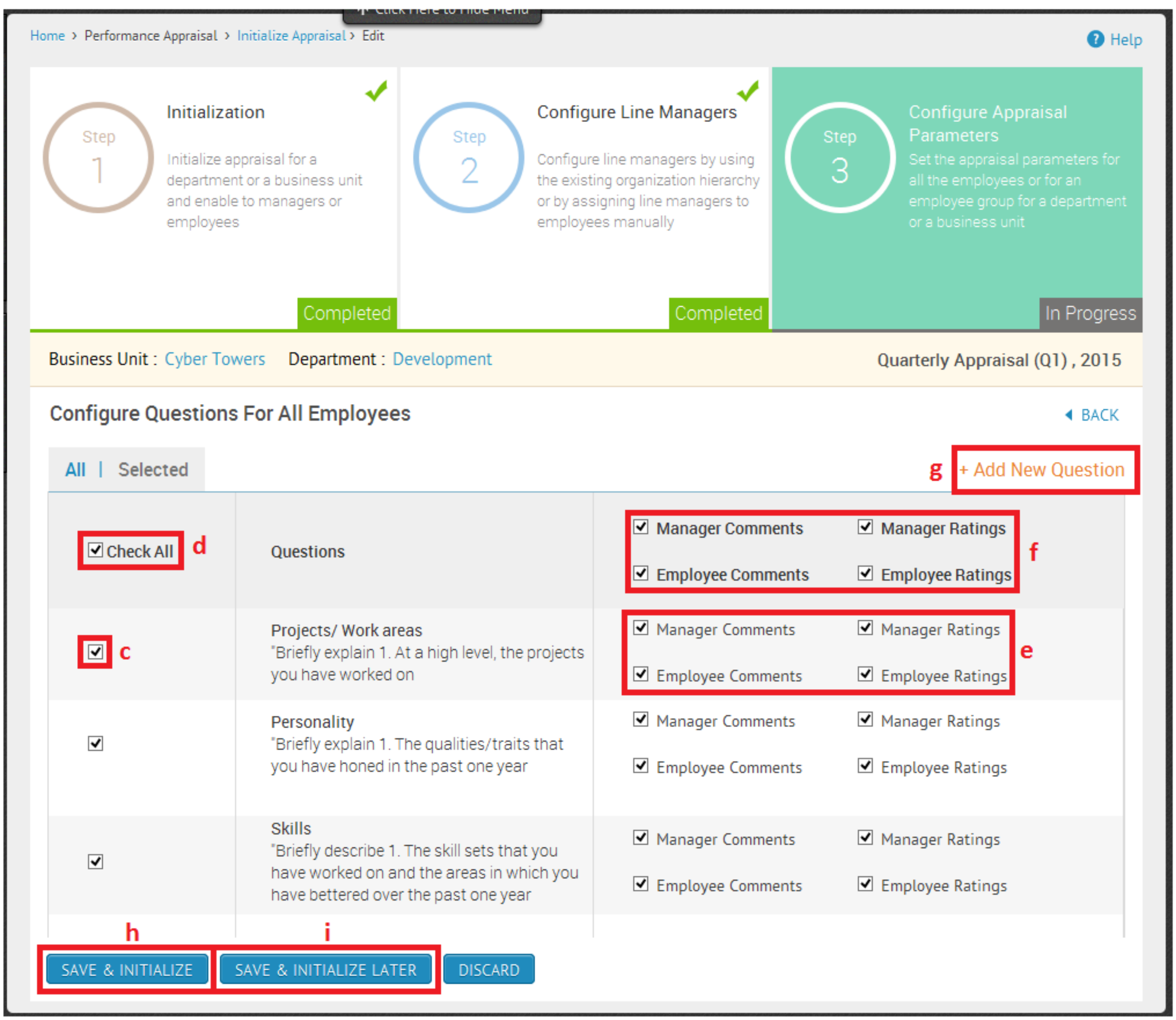


Figure 104

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

a. Click on Customized Employees Groups
b. Click Yes in the Confirmation alert box

Refer Figure 105

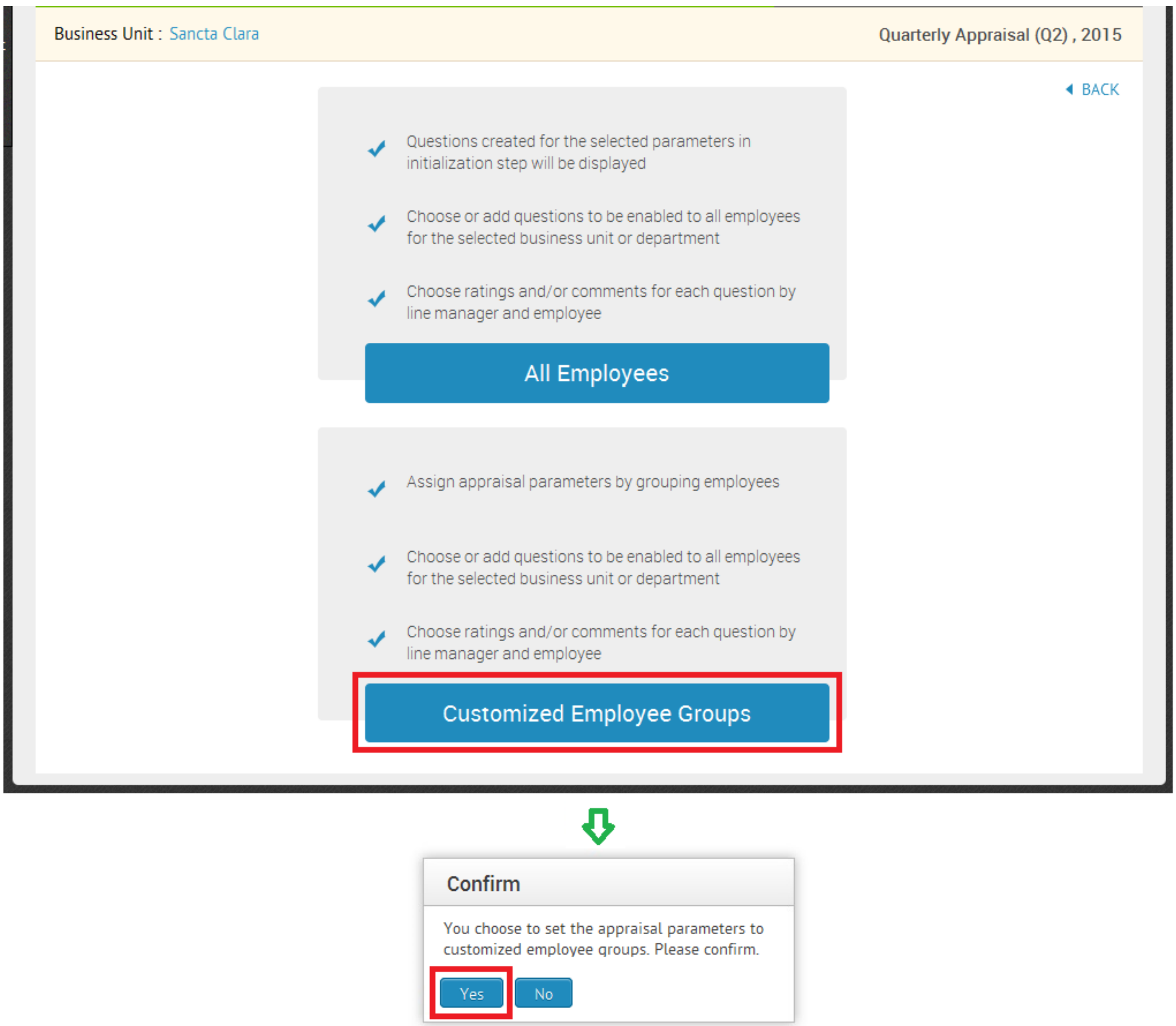


Figure 105

c. Click on Create New Group
d. Enter group name

e. Select employees applicable for the appraisal process
f. Select Questions individually by checking the checkbox respective to each question
   Or
g. Select all the questions by checking the Check All option in the table header
h. Select ratings or comments of manager or employee individually for all the questions
   Or
i. Select ratings or comments of manager or employee by checking the Manager Rating, Manager Comments, Employee Ratings and Employee Comments
j. Click on Add New Question to add more questions to the appraisal process
k. Click on Save to Configure Appraisal Parameters

Refer Figure 106

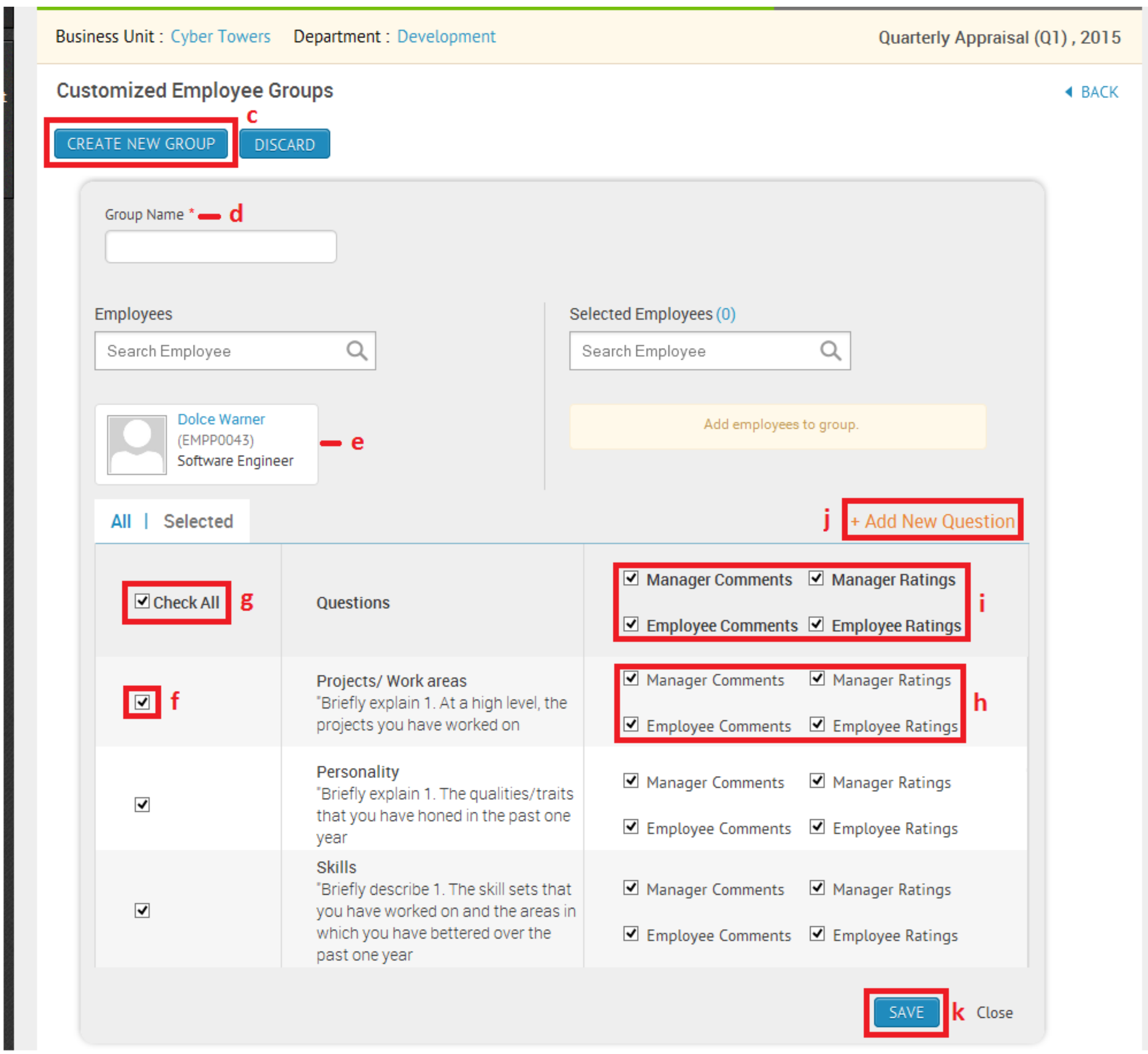


Figure 106

l. Upon Saving the appraisal parameters, click on initialize to initialize the appraisal process
m. Click on Initialize Later to only save the appraisal process
n. Click on Yes in the confirmation box to initialize the appraisal

Refer Figure 107

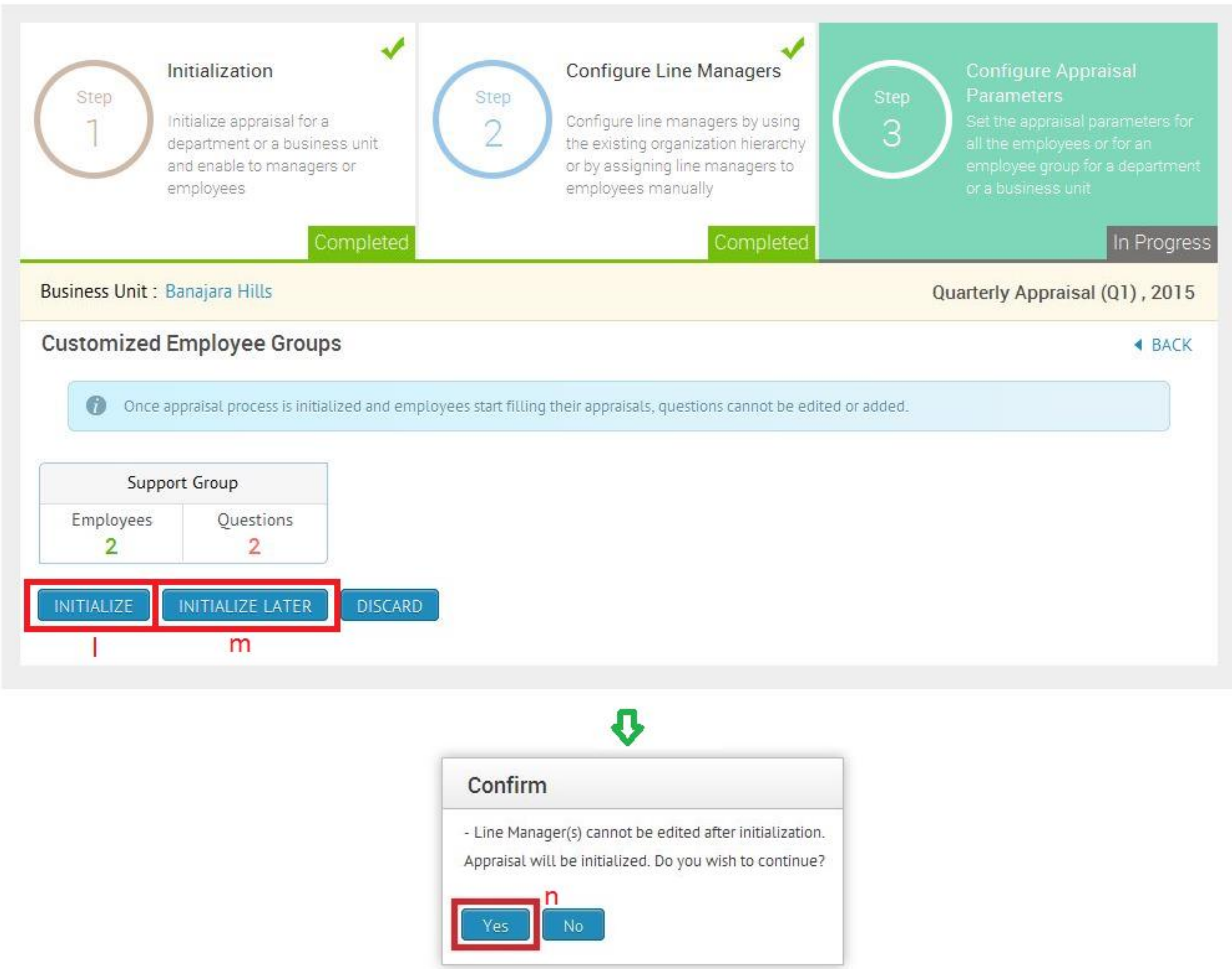


Figure 107

Manager Appraisal

In the first step of Initialize appraisal, if the appraisal is enabled to managers, managers can configure the appraisal parameters. Once the parameters are set, manager creates employee groups and applies the appraisal parameters to the group. Upon saving the appraisal settings, the HR will be able to change the status of appraisal process from "Enabled to Managers" to "Enabled to Employees".

a. Login as a manager
b. Click on Performance Appraisal in the header
c. Click on Manager Appraisal in the left side menu
d. Click on edit icon with respect to an appraisal process

Refer Figure 108

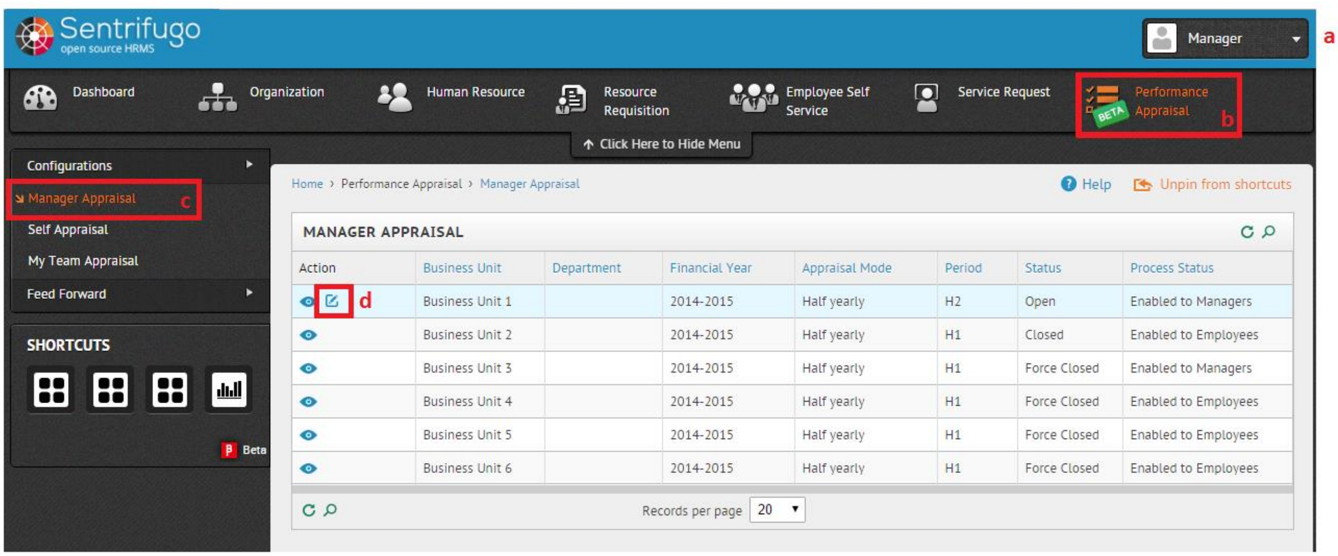


Figure 108

e. Create new group (E.g., Support, Testing, Development, etc.)
f. Add employees to the group by clicking on an employee
g. Click on Add New Question to add questions for a particular group of employees
h. Select Questions individually by checking the checkbox respective to each question
   Or
i. Select all the questions by checking the Check All option in the table header
j. Select ratings or comments of manager or employee individually for all the questions
   Or
k. Select ratings or comments of manager or employee by checking the Manager Rating, Manager Comments, Employee Ratings and Employee Comments
l. Click on Save

Refer Figure 109

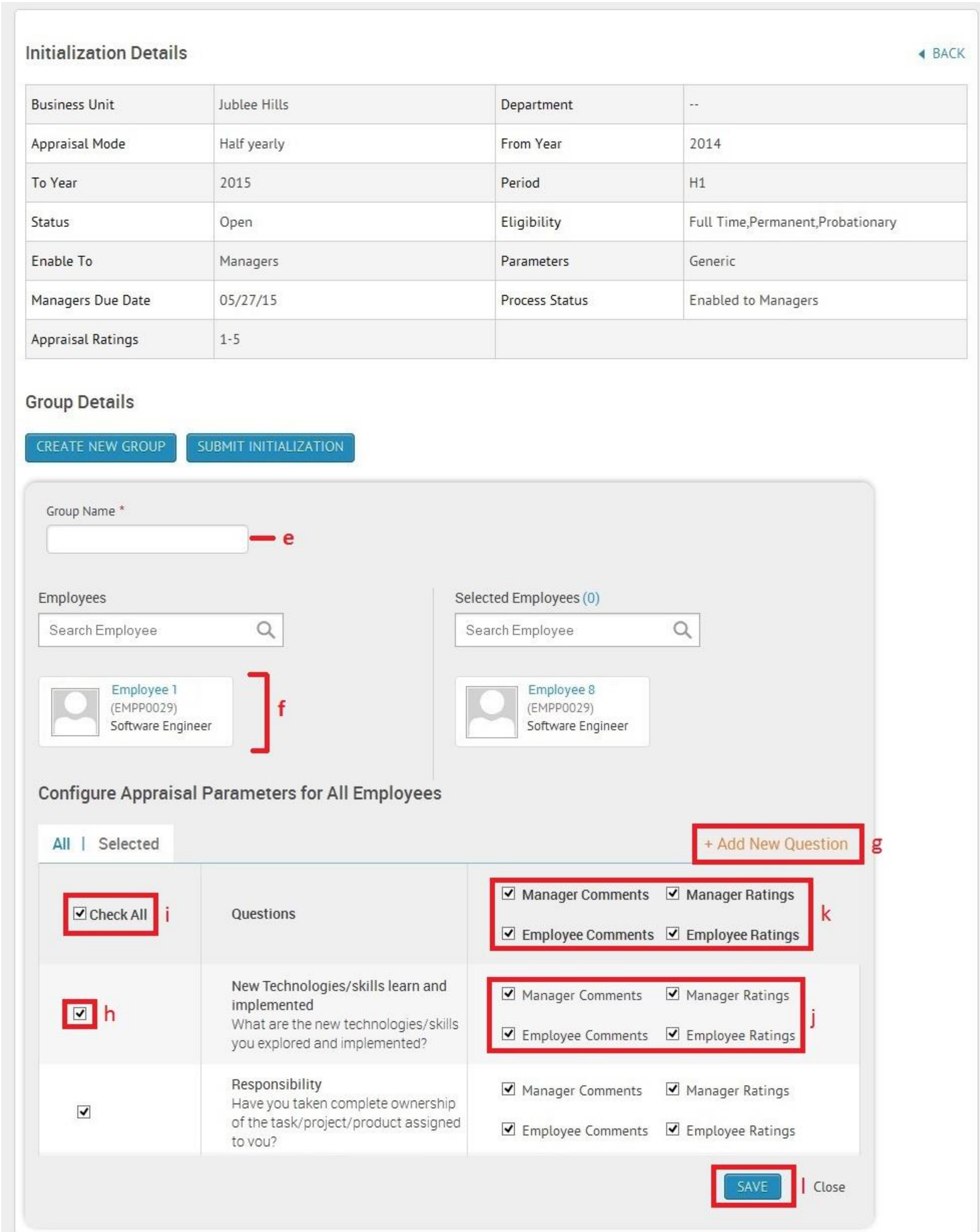


Figure 109

Upon saving appraisal details, the manager must submit the appraisal process for initialization.

m. Click on Submit Initialization

Refer Figure 110

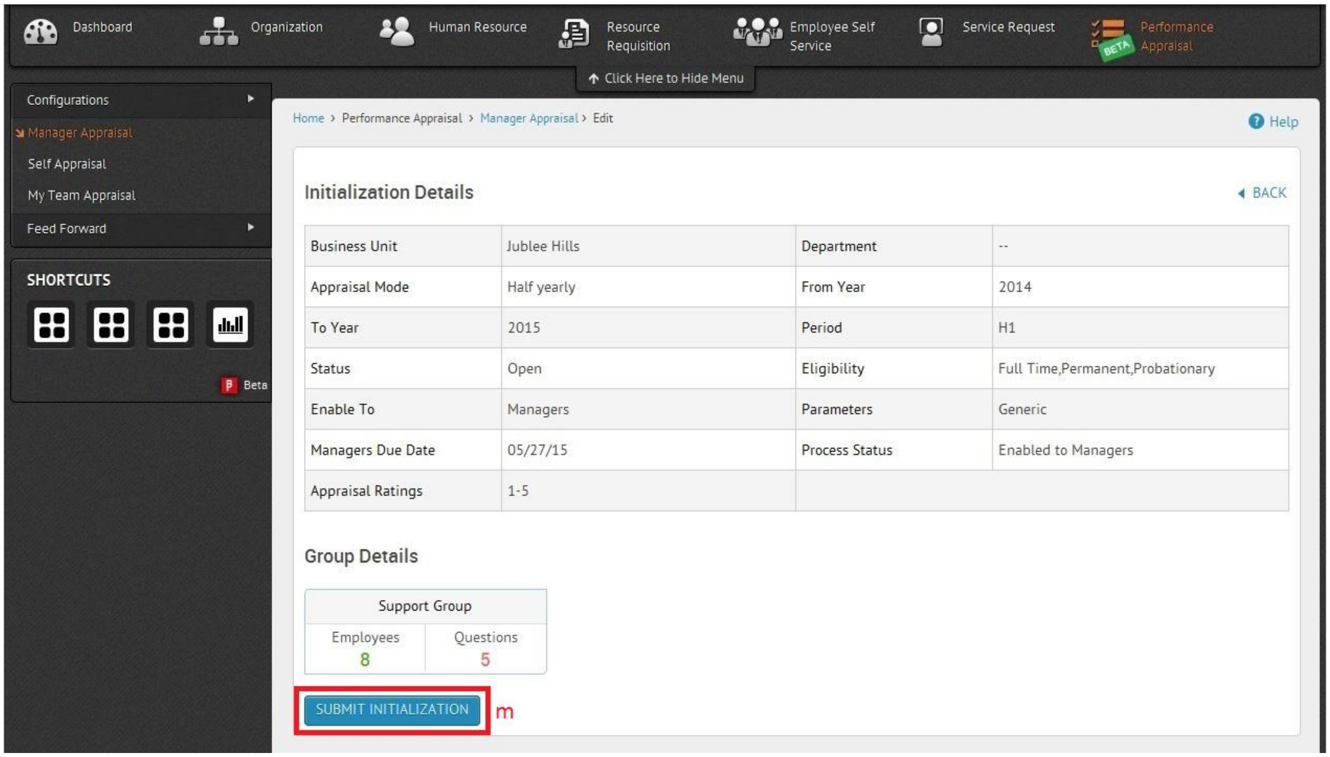


Figure 110

The Hr, then, will update the appraisal process by changing the process status from “Enable to Managers” to “Enable to Employees” and providing Employee Due Date.

a. Click on Performance Appraisal in the header
b. Click on Initialize Appraisal in the left side menu
c. Click on edit icon with respect to an appraisal process

Refer Figure 111

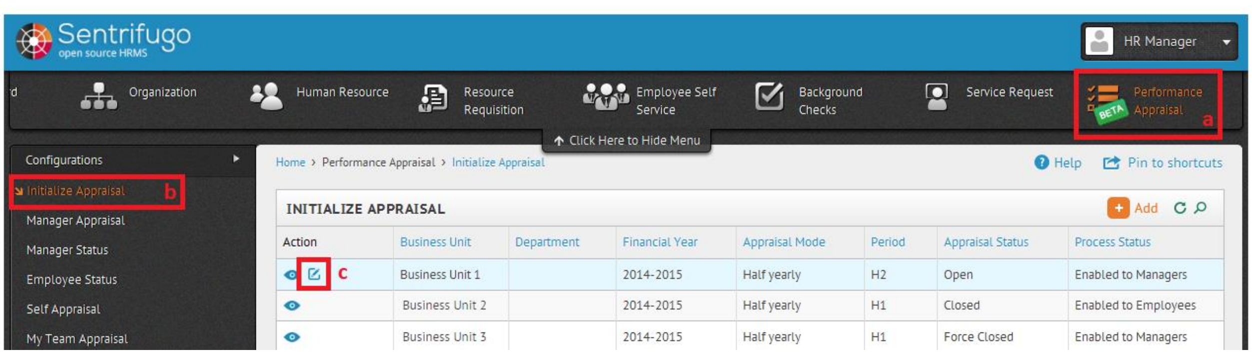


Figure 111

d. Select "Enable to Employees" in the Enable To dropdown
e. Pick a date for Employee Due Date
f. Click on Update to enable the appraisal process to employees

Refer Figure 112

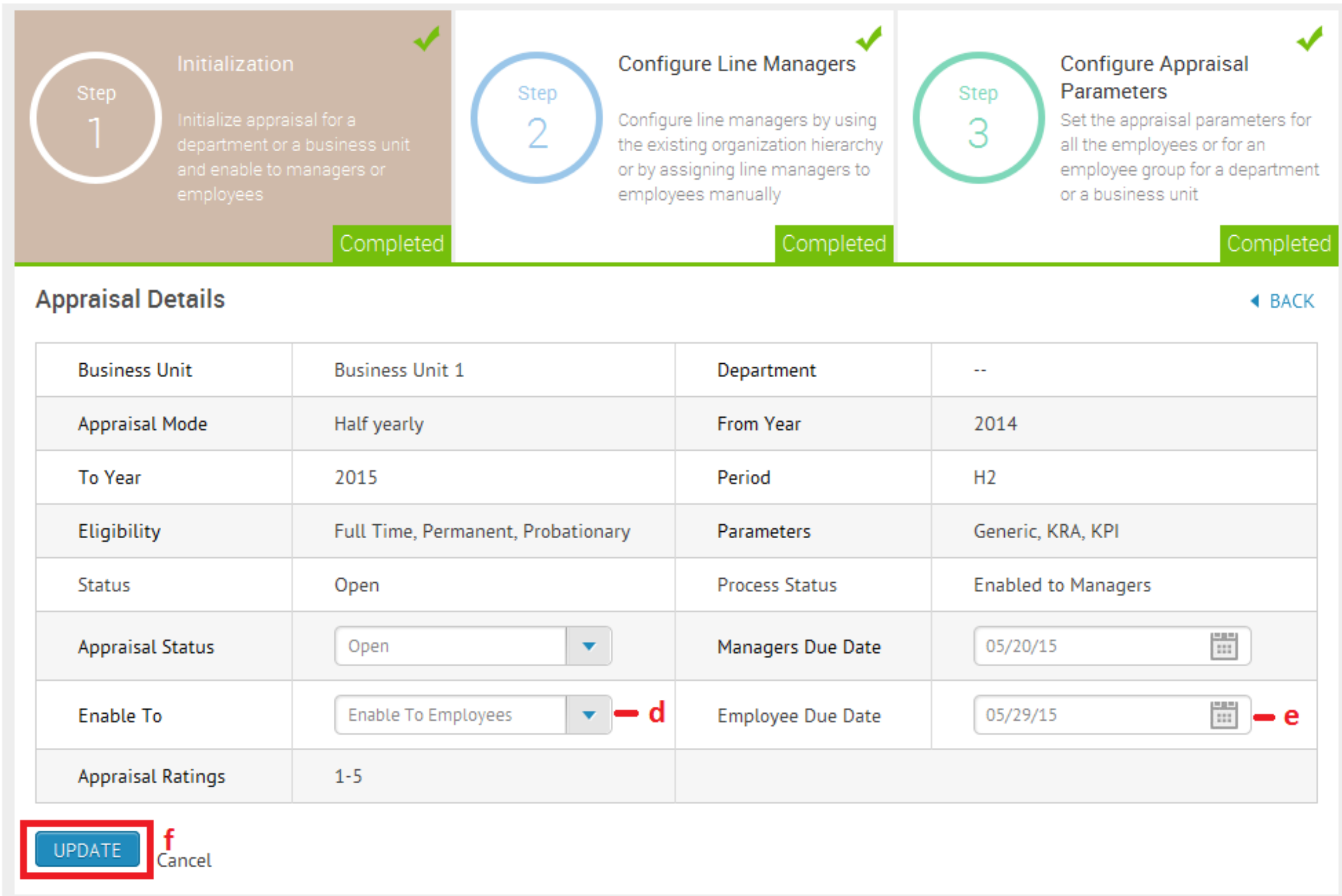


Figure 112

Manager Status

In this page, the HR views the status of appraisal process when it is enabled to the managers.

a. Click on Performance Appraisal in the header
b. Click on Manager Status in the left side menu
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

Refer Figure 113

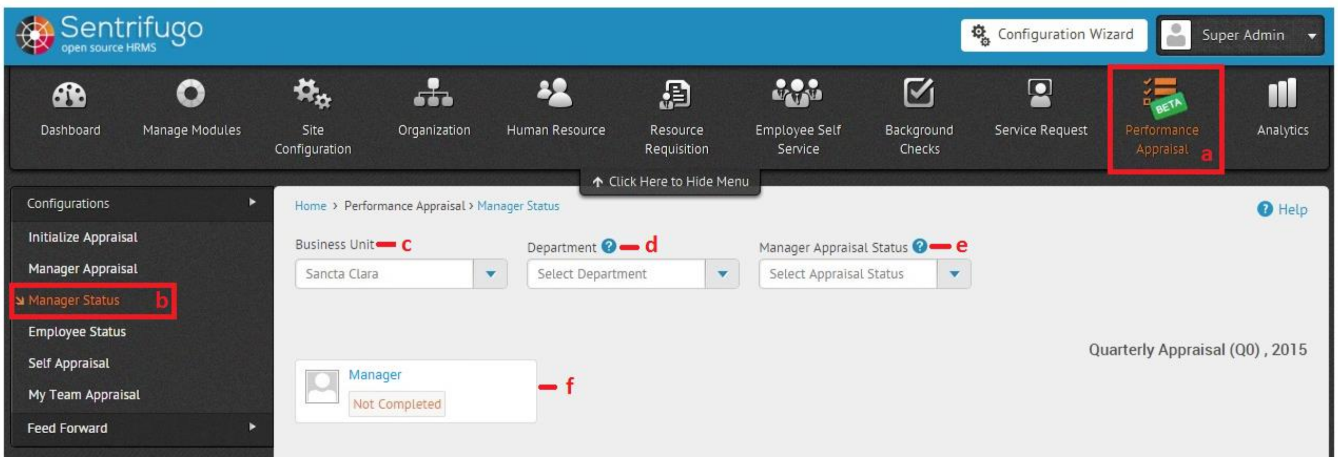


Figure 113

Employee Status

HR and Management roles will be able to view the employee appraisal status.

a. Click on Performance Appraisal in the header
b. Click on Employee Status in the left side menu
c. Select the Business Unit
d. Select the Department
e. Select Appraisal Status if required
f. Employees and their appraisal status will be displayed

Refer Figure 114

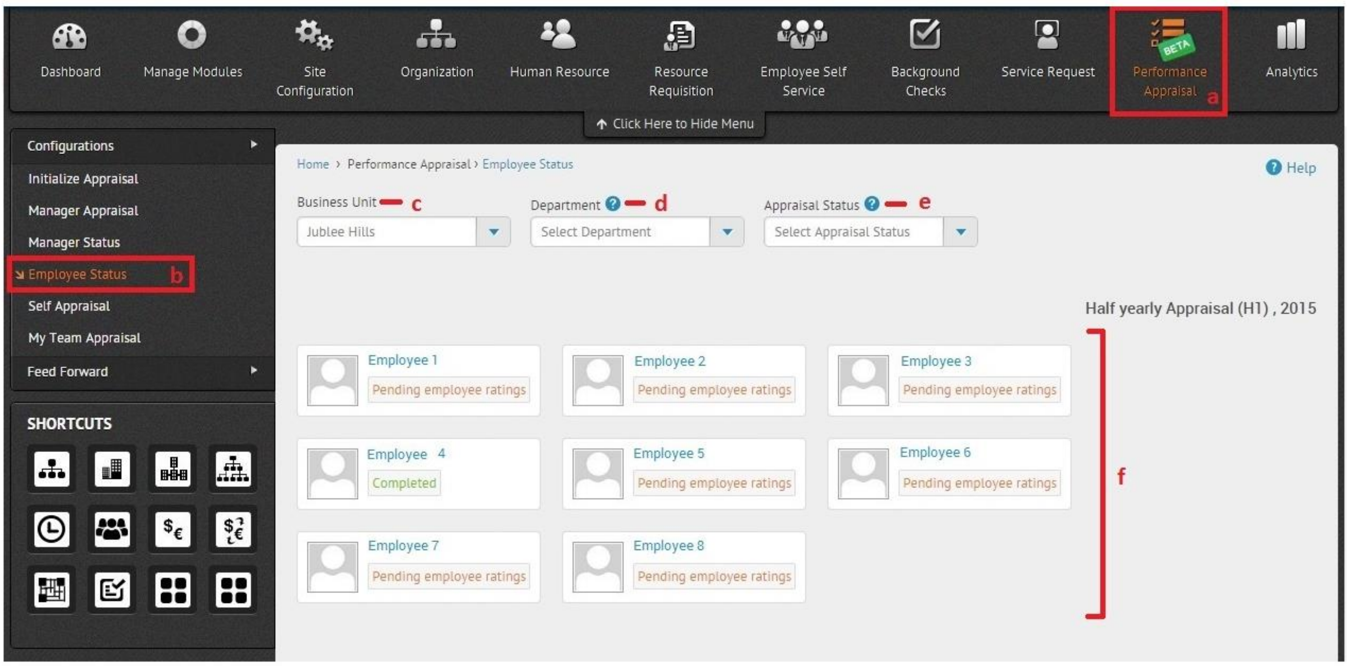


Figure 114

My Team Appraisal

Managers will be able to view their team employees' appraisal status. Once the employees completes the appraisal process, the managers 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.

a. Click on Performance Appraisal in the header
b. Click on My Team Appraisal in the left side menu
c. All the employees in the manager’s team will be displayed
d. The status of each employee’s appraisal is displayed
e. Click on Expand to provide Manager’s rating
f. Provide overall rating and comment for an employee

g. Provide the rating and comments respectively
h. Click on Submit to send it for approval based on the levels of appraisal
i. Click on Save as draft to save the ratings and comments

Refer Figure 115

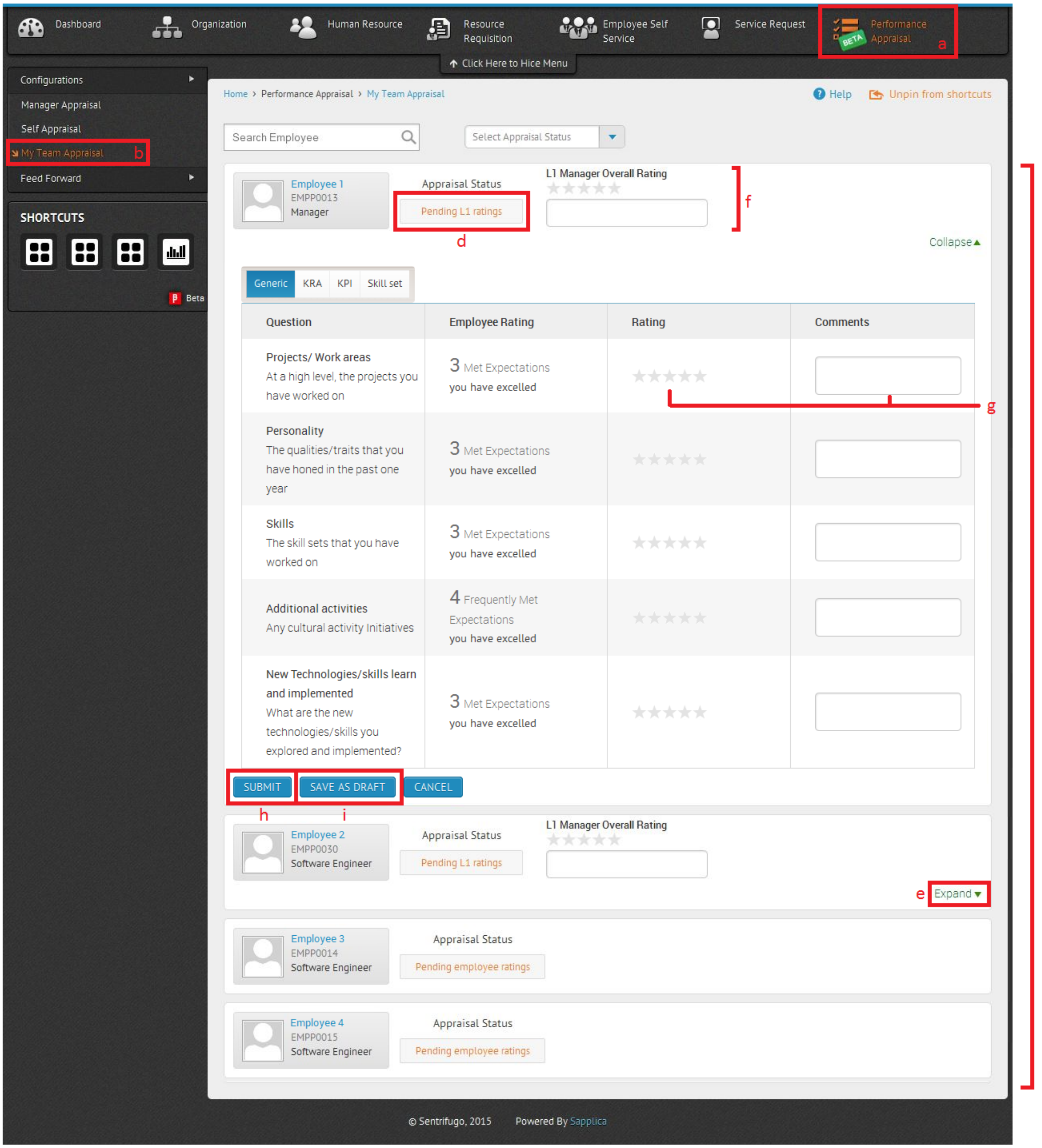


Figure 115

Self Appraisal

Self-appraisal is displayed to all the employees as each and every employee is subject to appraisal process. Here, the employees will provide self-appraisal details such as ratings and comments. Upon completion of self-appraisal, their appraisal will be visible to their line managers for further ratings and comments

a. Click on Performance Appraisal in the header
b. Click on Self Appraisal in the left side menu
c. The parameters are displayed above the questions grid
d. Provide rating and comments for every question
e. Click on Rating definition to know more about ratings
f. Click on Send to L1 Manager to send it to manager
g. Click on Save as Draft to only save the appraisal process

Refer Figure 116

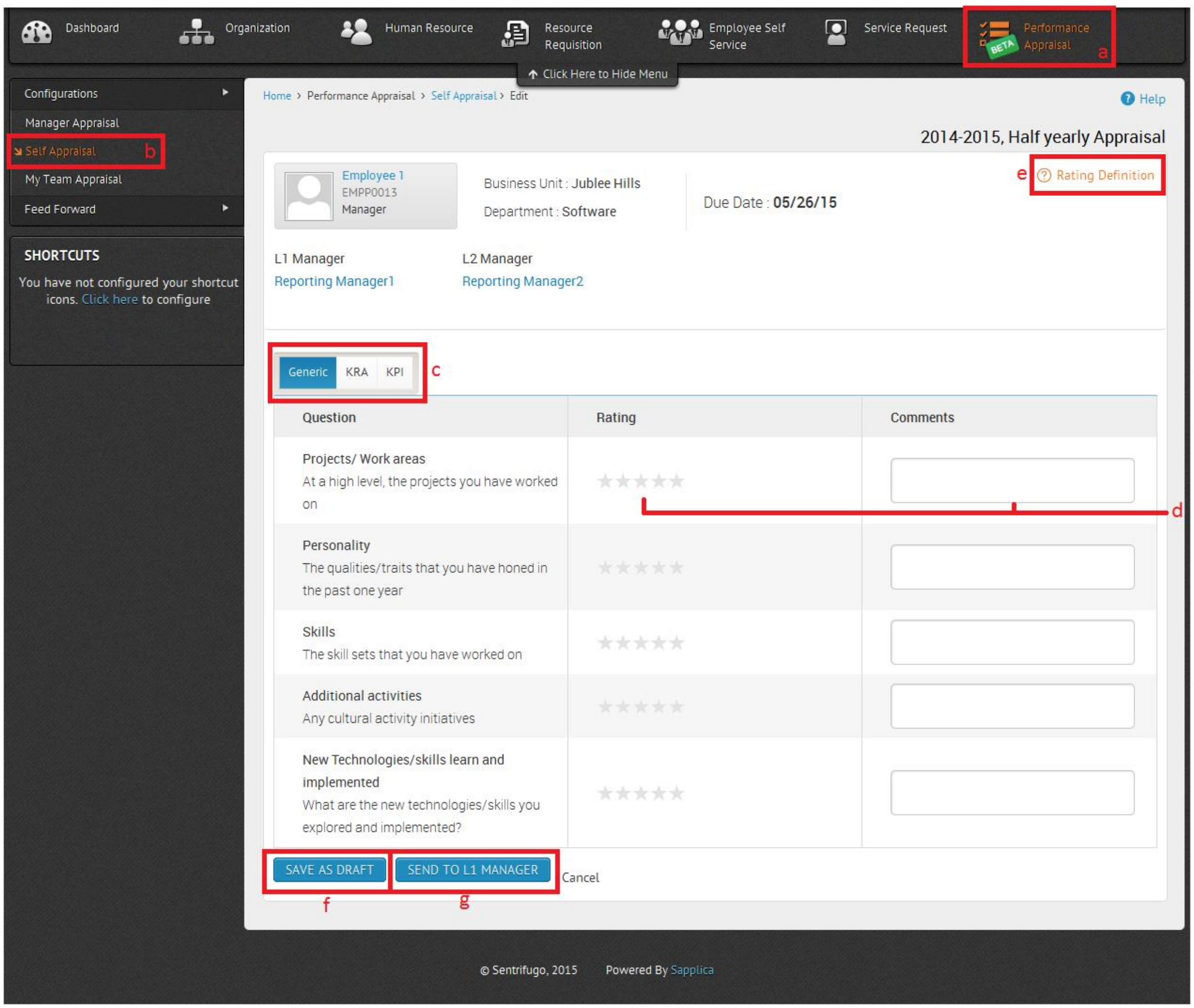


Figure 116

Feed Forward

Feed Forward is the feedback given by the employees to appraise their respective line managers. All the configurations are done on management level. Once all the employees have appraised their managers, managers' appraisal process will be carried out by the management.

Questions

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

a. Click on Performance Appraisal in the header
b. Click on Feed Forward in the left side menu
c. Click on Question in the submenu links
d. Click on Add in the right side grid

Refer Figure 117

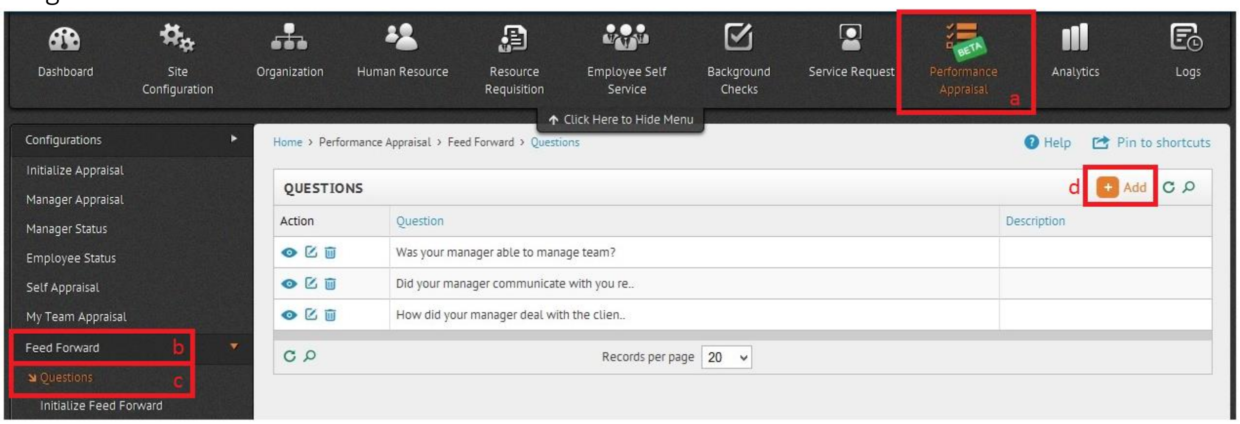


Figure 117

e. Add the question and description if required
f. Click on Add New Question to add more questions
g. Click on Save

Refer Figure 118

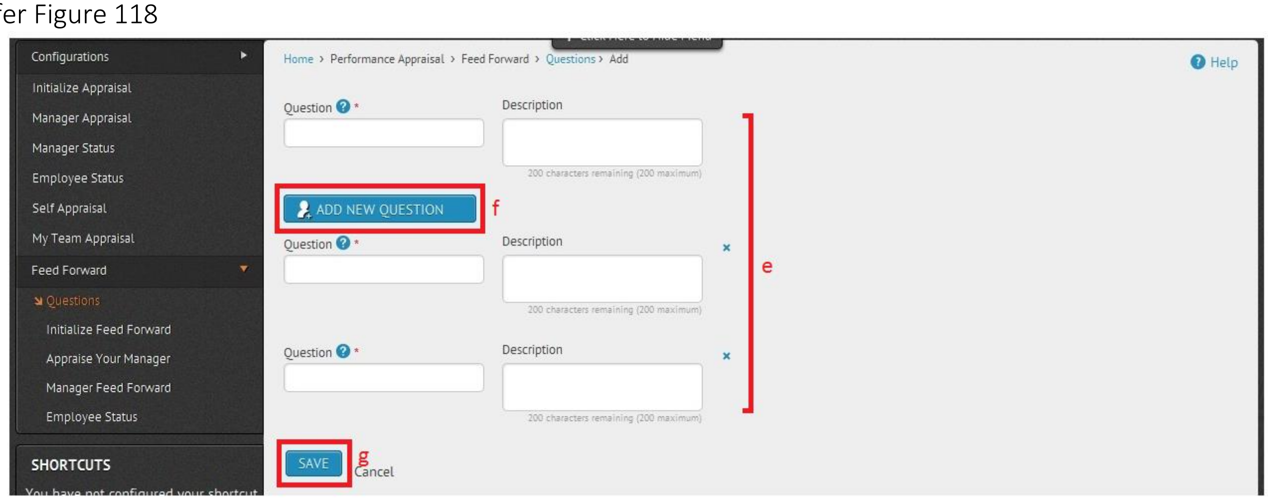


Figure 118

Initialize feed forward

In the initialize feed forward page, only the appraisal that have “Closed” status are displayed.

Appraisal: Select the appraisal from the populated dropdown. The appraisal details grid is displayed in the screen where Business Unit, Department, Appraisal Mode, From Year, To Year and Period are displayed.
Status: Feed Forward status will be "Open" by default. Upon the initialization of feed forward, close and force close options will be made available

- Force Close: Closes the Appraisal Process by force. Appraisal Process for the selected Business Unit can be configured again and for the same appraisal period
- Close: Closes the appraisal process for the selected business unit permanently

Employee Details: Here, the Management will determine if the management can view only the feedback given by the employee or the feedback along with the employee names.
Show: Employee names and their feedbacks will be displayed
Hide: Only the feedbacks 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 link is also provided.

a. Click on Performance Appraisal in the header
b. Click on Feed Forward in the left side menu
c. Click on Initialize Feed Forward in the submenu links
d. Click on Add in the right side grid

Refer Figure 119

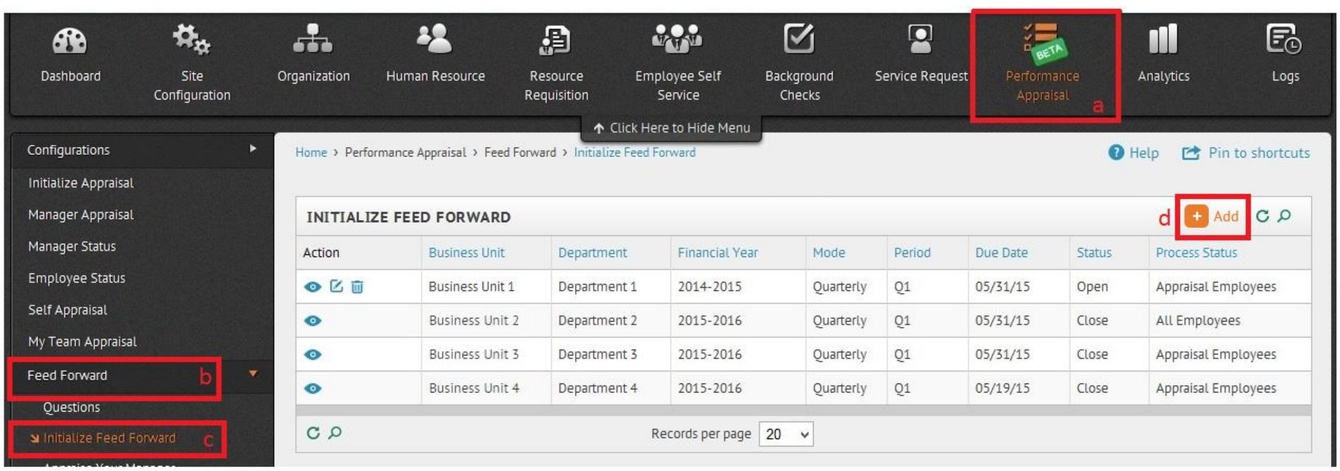


Figure 119

e. Select an appraisal process from the Appraisal dropdown
f. The Status will be by default selected as Open
g. Define whether or not you want to view the employee details along with their feedback ratings and comments
h. Enable Feed Forward to all employees or only to employees who are eligible for Appraisal process
i. Pick a date for employees to provide their feedback
j. Click on Add New Question to add questions for Feed Forward
k. Select Questions individually by checking the checkbox respective to each question

   Or

l. Select all the questions by checking the Check All option in the table header
m. Select comments individually for all the questions

   Or

n. Select comments by checking the Comments checkbox in the table header
o. Click on Save & Initialize to initialize the Feed Forward process
p. Click on Save & Initialize Later to only save the Feed Forward process

Refer Figure 120

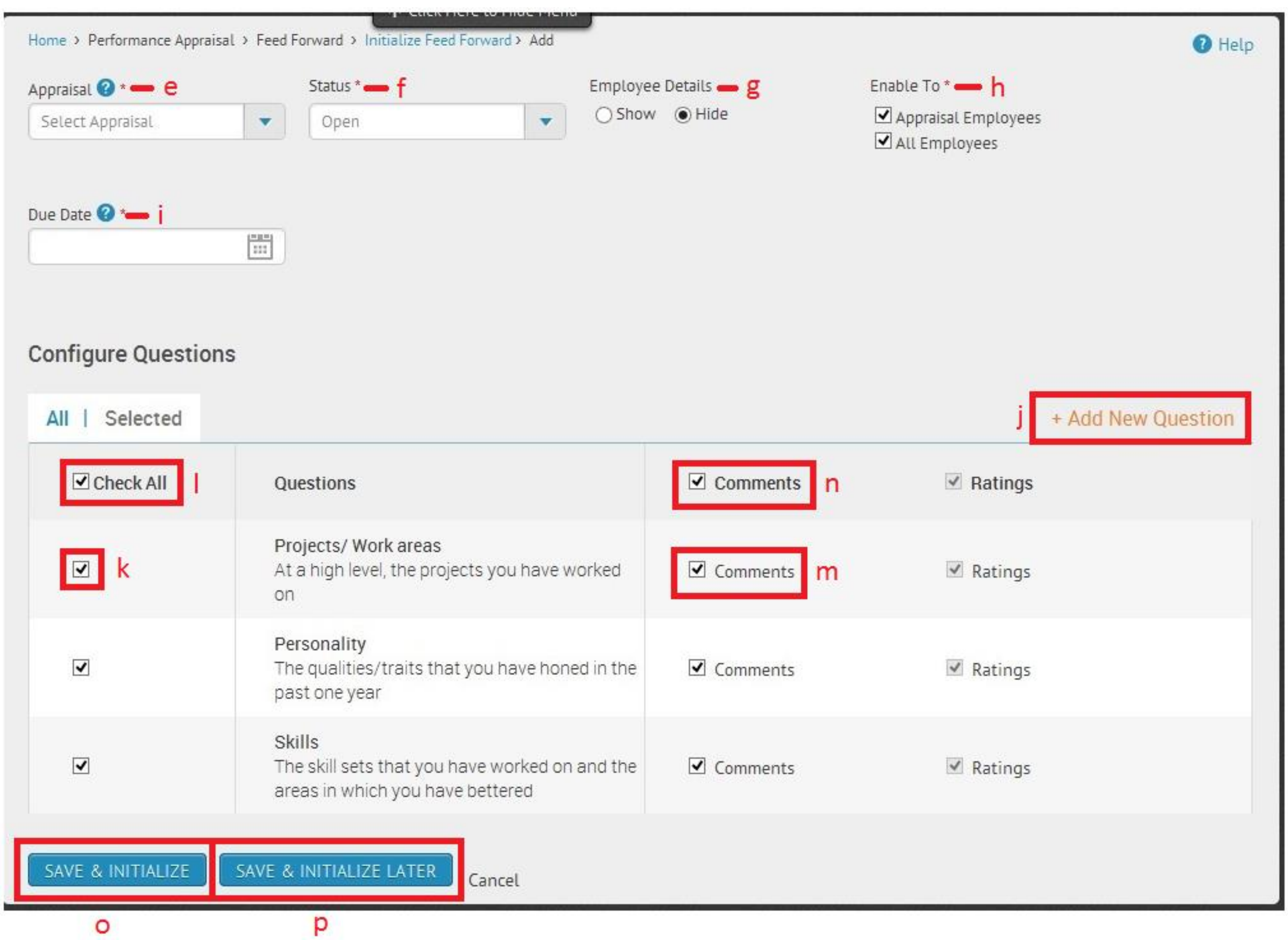


Figure 120

Appraise Your Managers

The employees will be able to view the questions established to appraise their line managers. They can provide ratings and comments for each question and the manager feed forward is submitted.

a. Click on Performance Appraisal in the header
b. Click on Feed Forward in the left side menu
c. Click on Appraise Your Manager in the submenu links
d. Provide ratings and comments
e. Enter additional comments (not mandatory)
f. Click on Save as Draft to save Feed Forward
g. Click on Submit to submit Feed Forward

Refer Figure 121

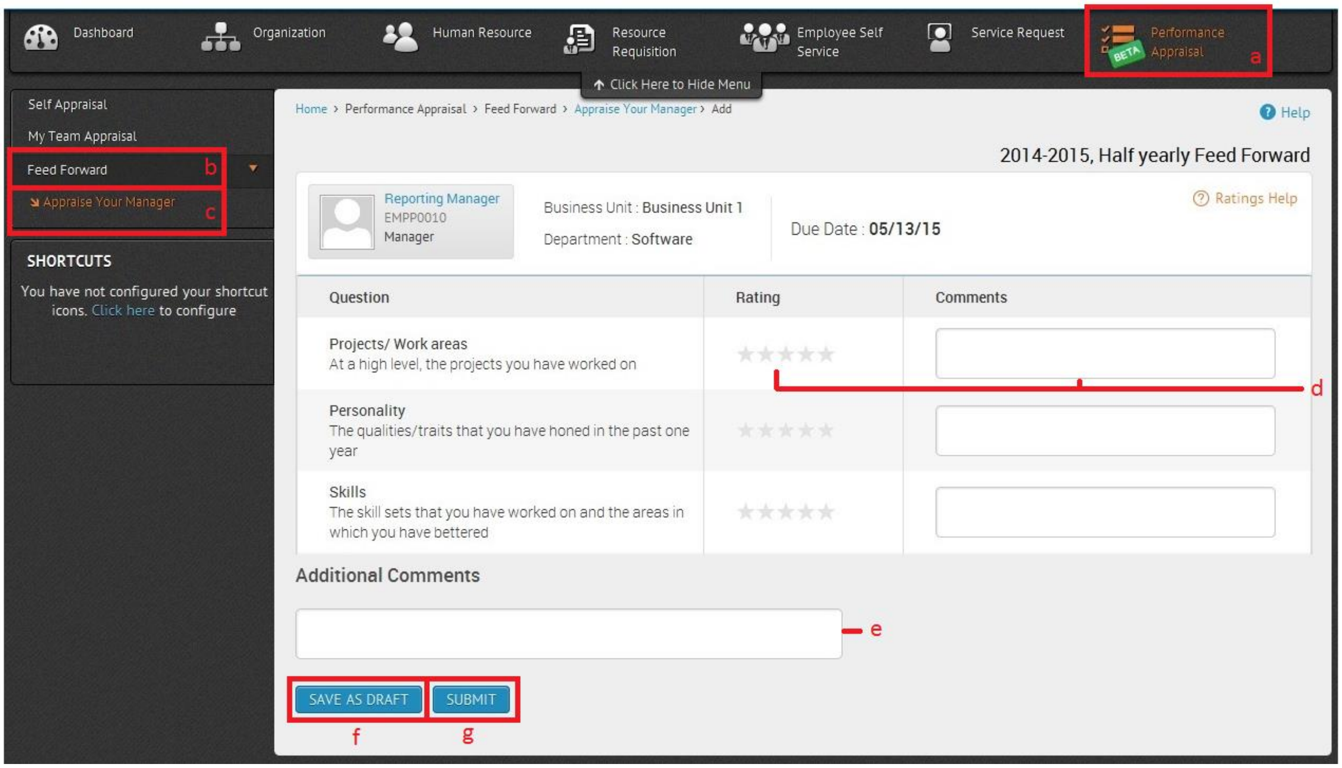


Figure 121

Manager Feed Forward

Only the Management will be able to view managers feed forward. Upon selection of appraisal from the dropdown, feed forward details along with the manager ratings are displayed. The average ratings of all the employee will be highlighted. A detailed description of comments and ratings of employees are displayed by question or by employee.

a. Click on Performance Appraisal in the header
b. Click on Feed Forward in the left side menu
c. Click on Appraise Your Manager in the submenu links
d. Select a process to Feed Forward details in the dropdown

Refer Figure 122

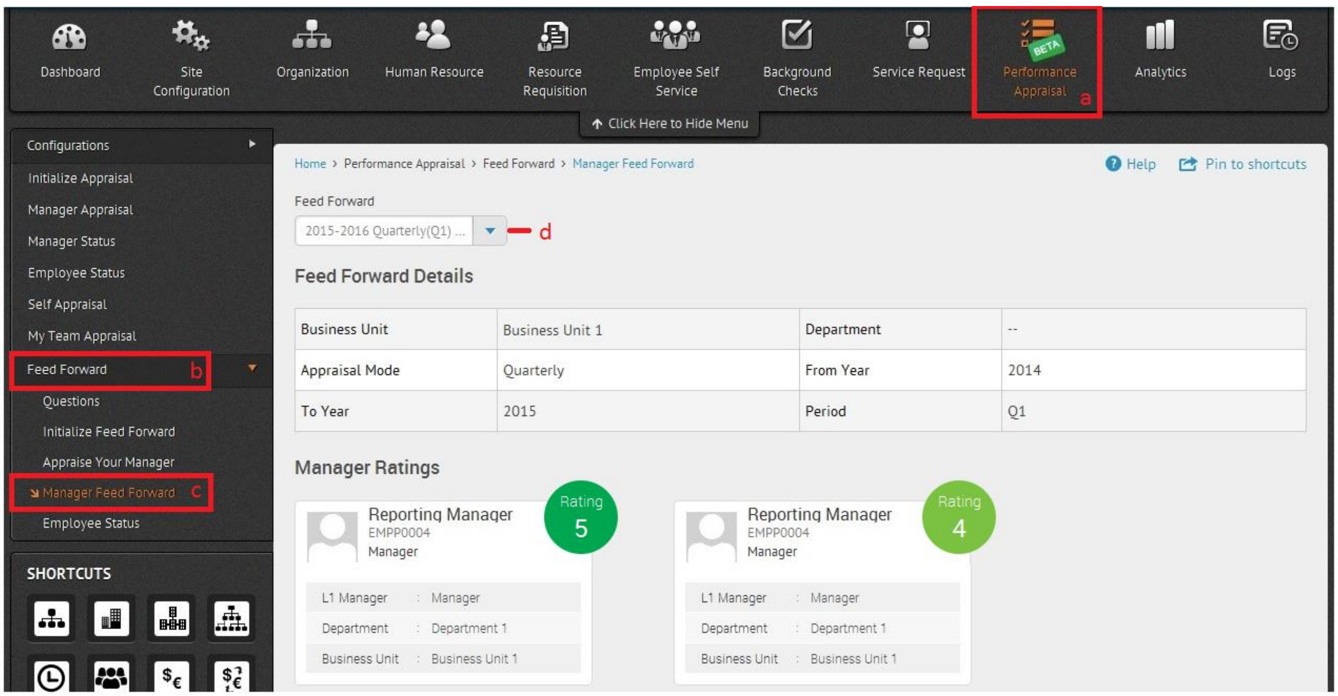


Figure 122

e. Click on individual manager section to view the ratings and comments provided by employees
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

Refer Figure 123

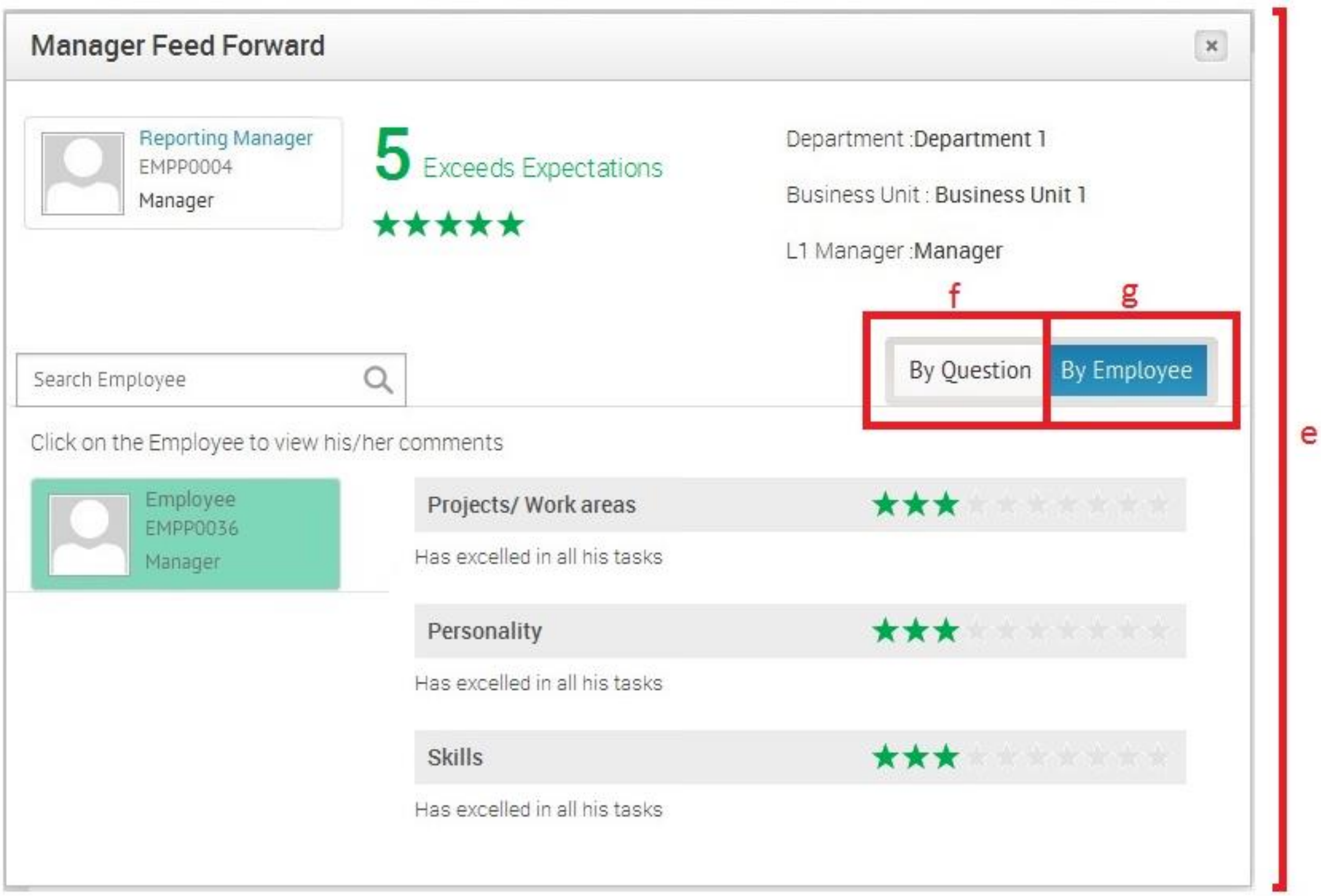


Figure 123

Employee Status

Management will be able to view the feed forward status of all the employees.

a. Click on Performance Appraisal in the header
b. Click on Feed Forward in the left side menu
c. Click on Employee Status in the submenu links
d. Select a process to Feed Forward details in the dropdown
e. The employees of the selected process along with their Feed Forward status will be displayed

Refer Figure 124

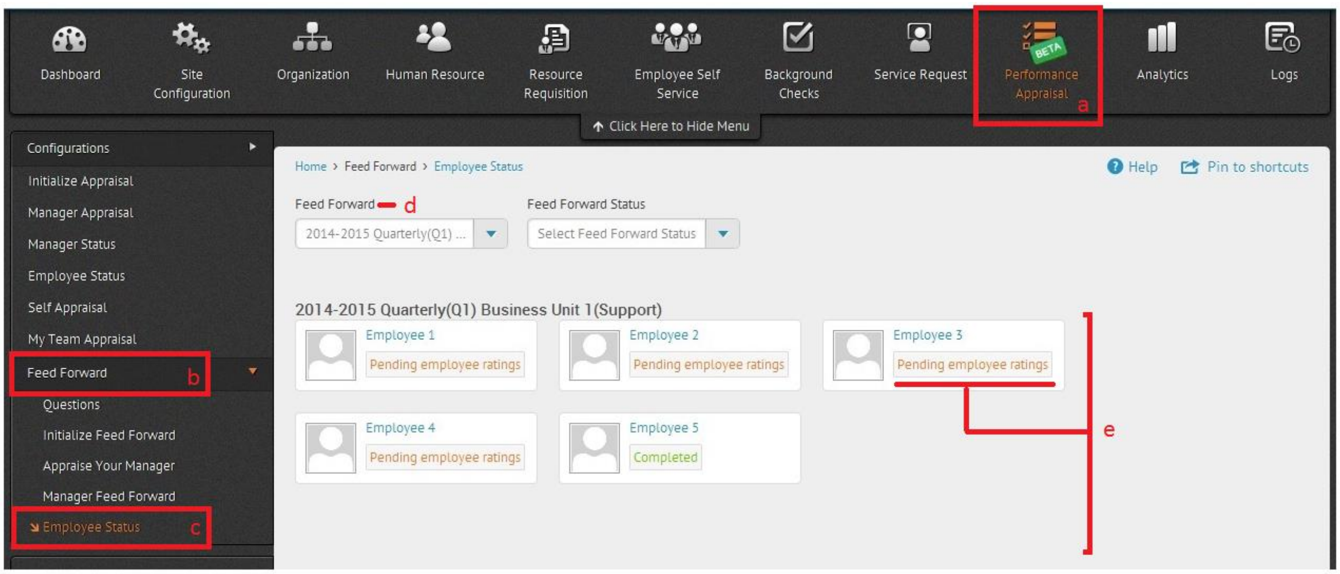


Figure 124