



Sentrifugo

open source HRMS

3.1.1 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.



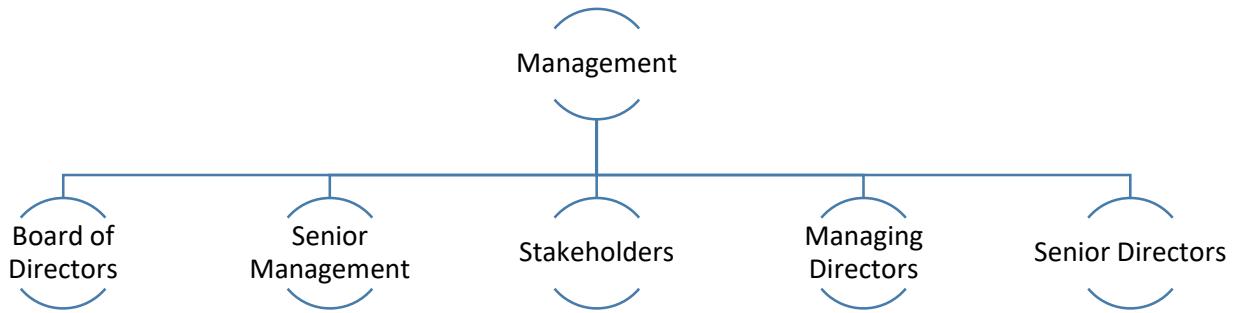
Since the Super Admin will not be included in the employee's list, he/she will not be able to perform employee actions like raising a leave request, service request, submitting timesheets etc. You can add another employee to Sentrifugo for the Super Admin user, with his/her actual details like Name,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

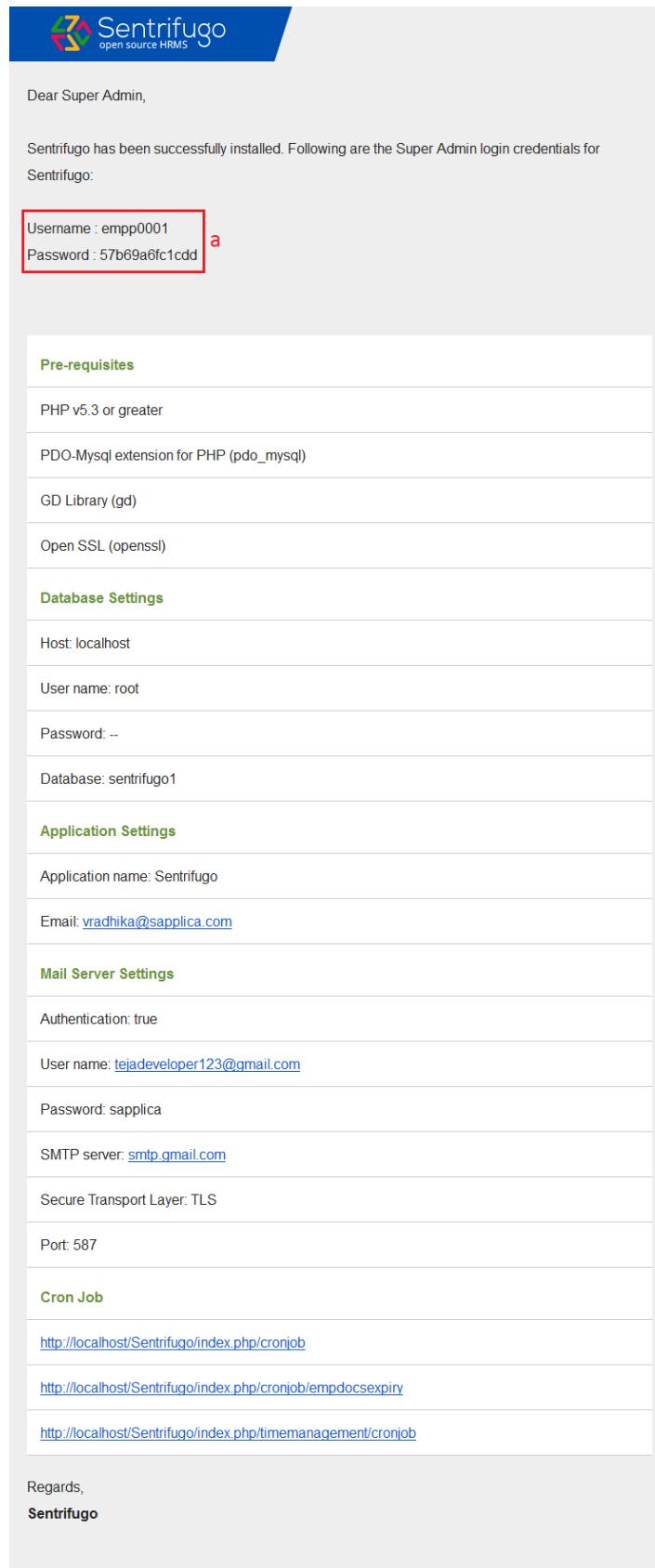


Figure 2

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.

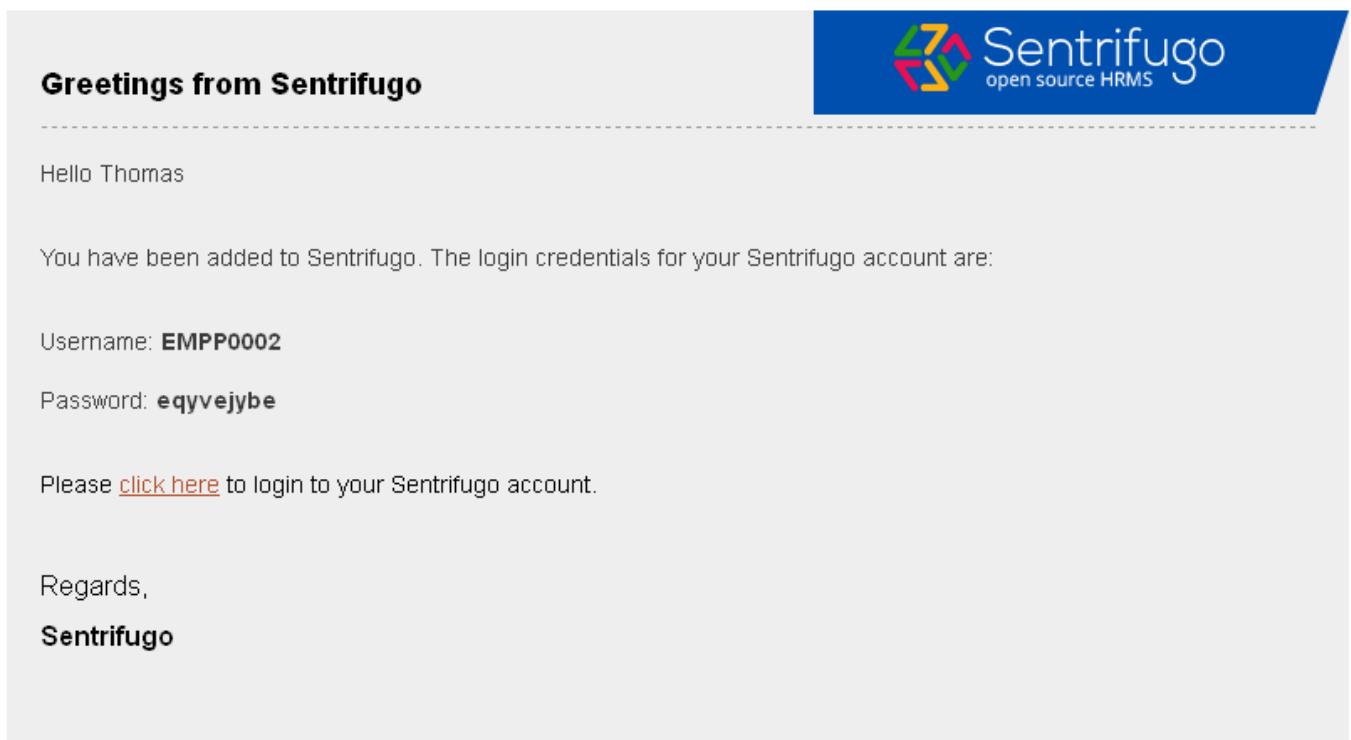
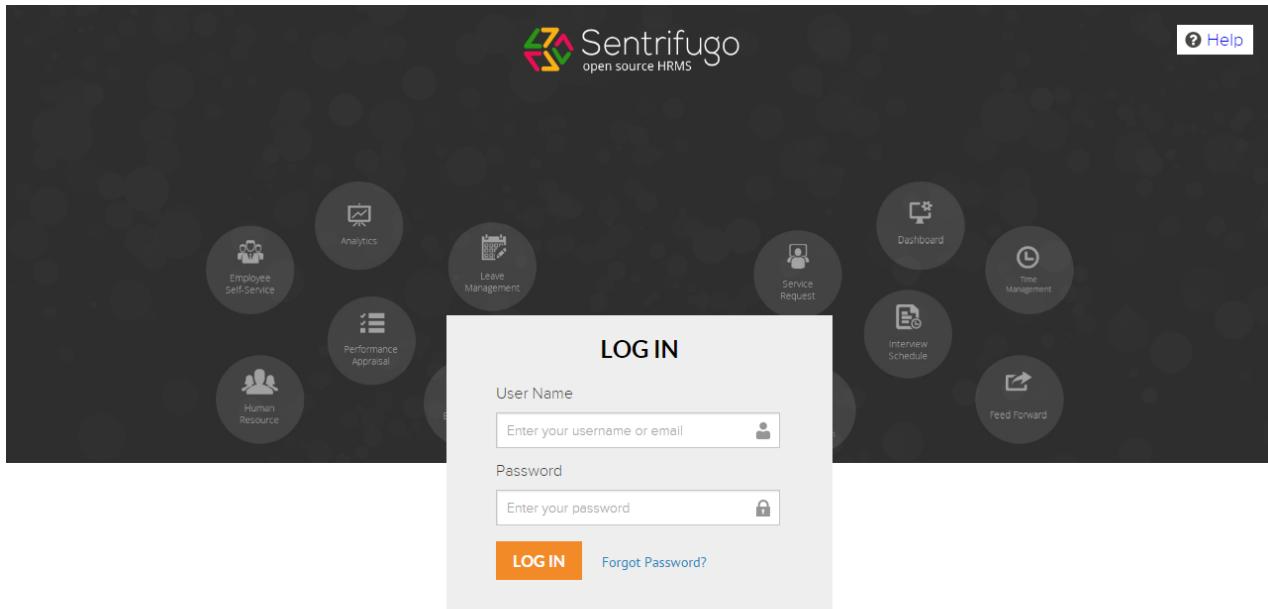


Figure 3

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



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

1.3 How do I set up Sentrifugo?

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

1.3.1 Configuration Wizard

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

Information is gathered in 5 steps.

Step 1: Modules

Please refer Figure 4.

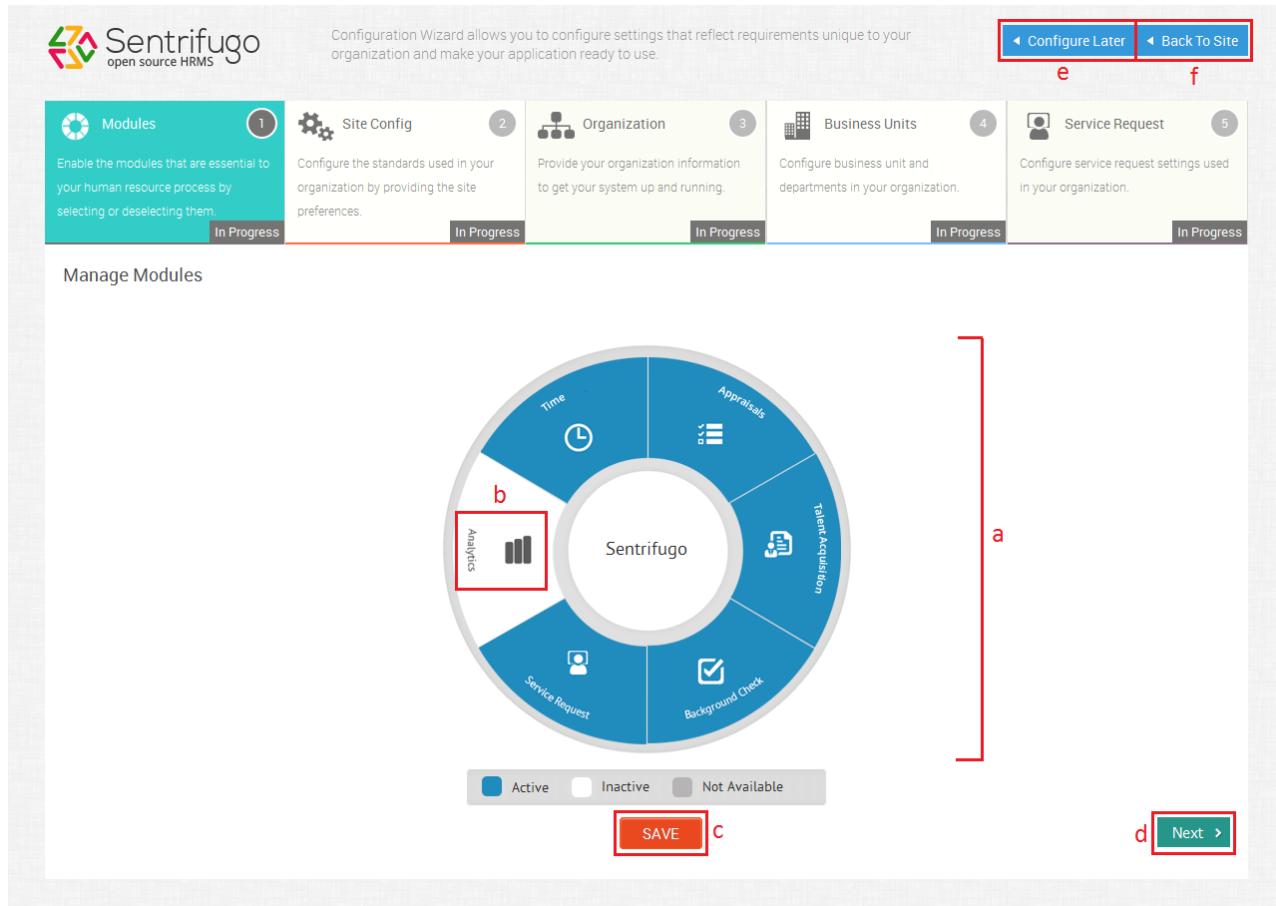


Figure 4

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

Step 2: Site Config

Please refer Figure 5.

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

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

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

Site Configuration

Employee Code ? *	Currency ? *	Date Format ? *	Time Format ? *
<input type="text" value="EMPP"/>	<input type="button" value="Select Currency"/> <input type="button" value="▼"/>	<input type="button" value="Select Date Format"/> <input type="button" value="▼"/>	<input type="button" value="Select Time Format"/> <input type="button" value="▼"/>
Time Zone is not configured yet. Add Time zone			
Default Time Zone ? *	Country ? *	State ? *	City ? *
<input type="button" value="Select Time Zone"/> <input type="button" value="▼"/>	<input type="button" value="Select Country"/> <input type="button" value="▼"/>	<input type="button" value="Select State"/> <input type="button" value="▼"/>	<input type="button" value="Select City"/> <input type="button" value="▼"/>
h			
Default Password ? *	Employment Status ? *		
<input type="button" value="Select Password Preference"/> <input type="button" value="▼"/>	<input type="text"/>		

◀ Prev

Next ➤

g

Figure 5

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

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

Step 3: Organization

Please refer Figure 6.

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

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

 Modules	 Site Config	 Organization 3	 Business Units 4	 Service Request 5
Enable the modules that are essential to your human resource process by selecting or deselecting them.	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	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 ? *

Add Country i

State ? *

Add State j

City ? *

Add City k

Main Branch Address ?

Address 1 ?

Address 2 ?

Organization Description ?

Upload Organization Logo ?

 265px X 40px

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

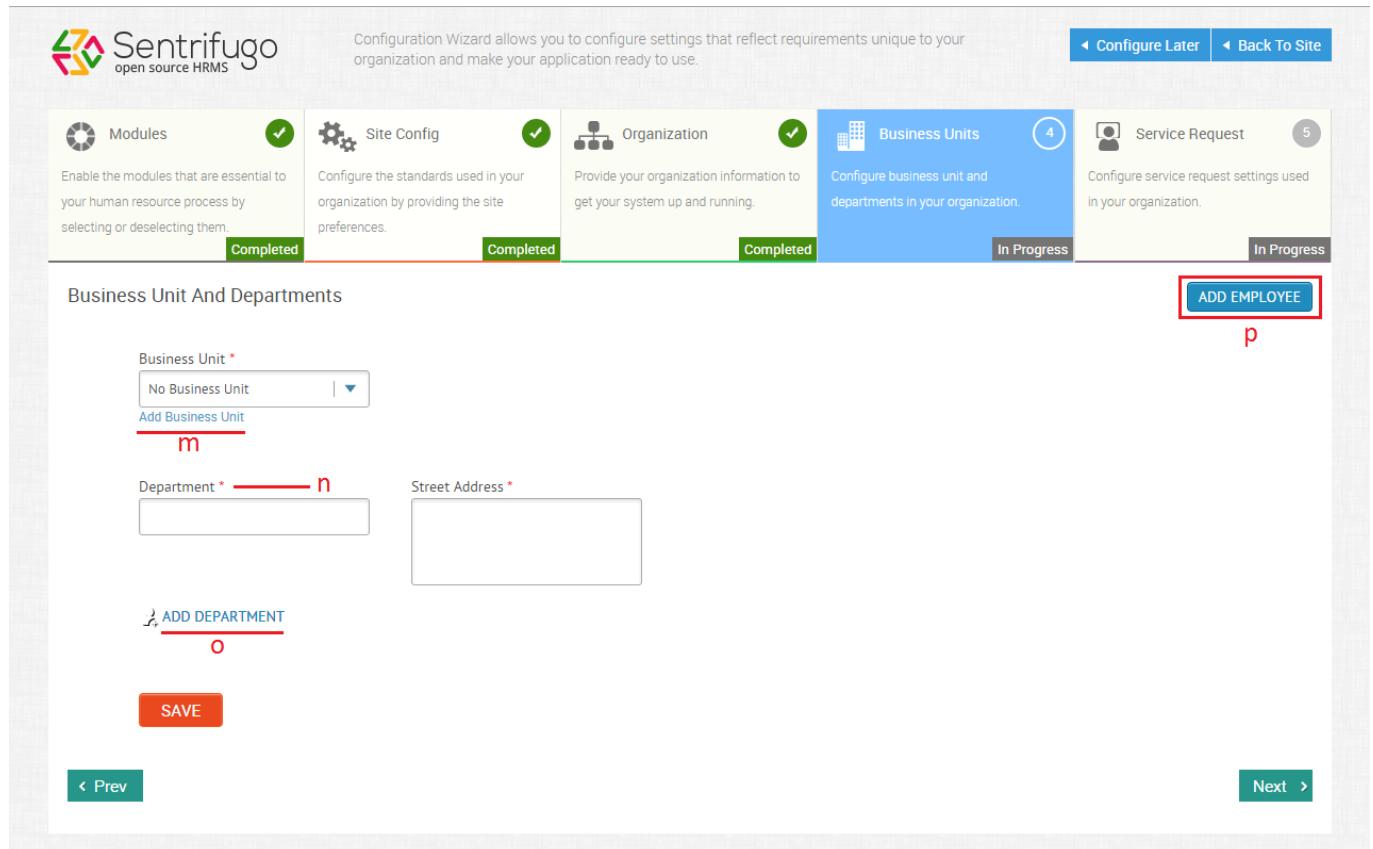
After saving your organization's details, an **ADD Employee** button will appear on the top right corner of the configuration wizard screen. However, it is not mandatory to add an employee in this step, you can even add an employee after the entire configuration is completed.

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.



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

Business Unit And Departments

Business Unit *
 | ▾
[Add Business Unit](#) **m**

Department * **n**

Street Address *

[ADD DEPARTMENT](#) **o**

SAVE

Configure Later **Back To Site**

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
q

Request Type * 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.

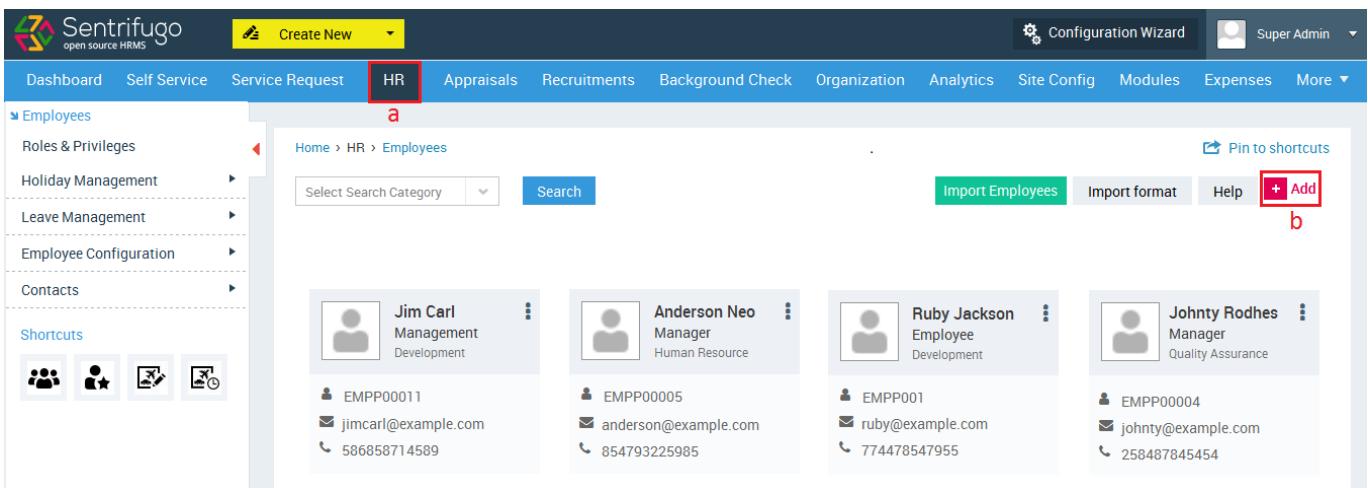
The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes 'Create New' (highlighted with a yellow box), 'Configuration Wizard' (highlighted with a red box), and a 'Super Admin' dropdown. The main menu has tabs for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. On the left, a sidebar for 'Employees' lists Roles & Privileges, Holiday Management, Leave Management, Employee Configuration, and Contacts. Under 'Shortcuts', there are icons for users, roles, employees, and reports. The central content area shows the 'Employees' section with a breadcrumb path: Home > HR > Employees. It contains a 'MANAGEMENT DETAILS' form with fields: Employee Code * (EMPP), Employee Id *, First Name *, Last Name *, Prefix (Select Prefix), Role * (Select Role), Email *, Job Title (Select Job Title), Position (Select A Position), Date of Joining *, and Management Description (with a note: 200 characters remaining (200 maximum)). Error messages 'Job titles are not configured yet.' and 'Positions are not configured yet.' are displayed above the respective dropdowns. 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 HR module. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (which is highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. On the left, a sidebar lists Employees, Roles & Privileges, Holiday Management, Leave Management, Employee Configuration, and Contacts. Below these are Shortcuts with icons for users, roles, departments, and reports. The main content area displays a list of employees with their names, roles, and contact information. A search bar at the top right allows for filtering by category and searching. On the far right, there are buttons for Import Employees, Import format, Help, and a prominent red +Add button. A red box labeled 'a' highlights the 'HR' menu item, and another red box labeled 'b' highlights the '+Add' button.

Name	Role	Department
Jim Carl	Management	Development
Anderson Neo	Manager	Human Resource
Ruby Jackson	Employee	Development
Johny Rodhes	Manager	Quality Assurance

Figure 10

- Click **HR** in the top menu
- 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"/> C	Prefix Select Prefix <input type="button" value="Add Prefix"/>
	First Name * <input type="text"/>	Last Name * <input type="text"/>	Mode of Employment * <input type="text" value="Direct"/>
	Role * Select Role	Email * <input type="text"/>	Business Unit No Business Unit
	Department ? * Select Department	Reporting Manager * Select Reporting Manager	Job Title Select Job Title
	Position ? Select Position	Employment Status * Select Employment Status	Date of Joining ? * <input type="text"/> d
	Date of Leaving ? <input type="text"/>	Years of Experience <input type="text"/>	Work Telephone Number <input type="text"/>
	Extension <input type="text"/>	Fax <input type="text"/>	
	e <input type="button" value="Save"/> <input type="button" value="Cancel"/>		

Figure 11

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



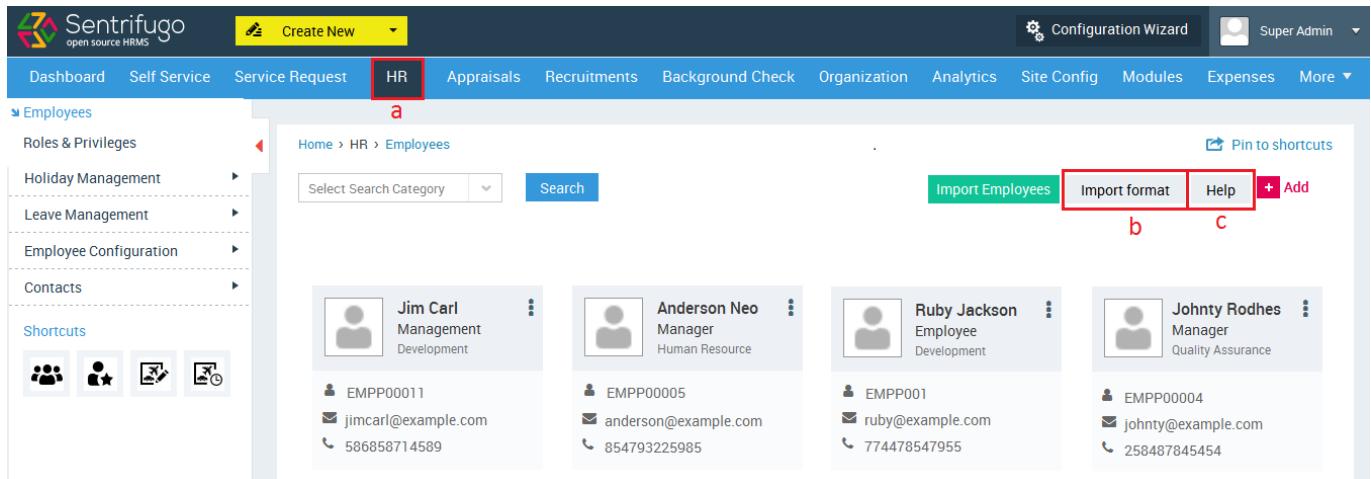
Only the Super Admin's ID number will be fixed as 0001. All the other Employees including the Organization Head can have customized employee ID numbers. For example:

Super Admin: EMP0001
Organization Head: EMP0022
Manager: EMP345
Employee: EMP90

1.4.3 Adding Employees in Bulk

Employees can be added in bulk using the import option. You have to download the import format excel doc, fill it in with all the employees' details and then import it.

Please refer Figure 12.

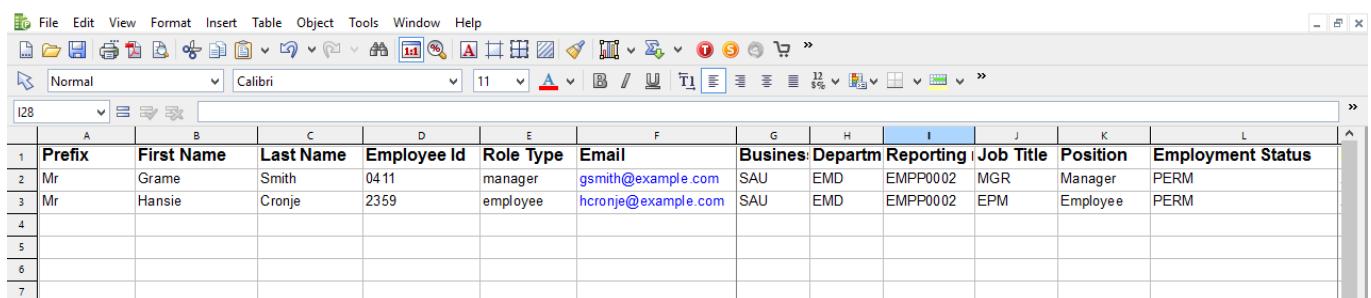


The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and a 'Super Admin' dropdown. The main menu has items like Dashboard, Self Service, Service Request, HR (which is highlighted with a red box 'a'), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. On the left, a sidebar lists 'Employees', 'Roles & Privileges', 'Holiday Management', 'Leave Management', 'Employee Configuration', 'Contacts', and 'Shortcuts'. The main content area displays a grid of employee profiles with columns for Name, Role, Department, and Contact information. At the top of the grid, there are buttons for 'Import Employees' (highlighted with a red box 'b'), 'Import format' (highlighted with a red box 'b'), 'Help' (highlighted with a red box 'c'), and '+ Add'.

Figure 12

- Click **HR** in the top menu
- Click **Import Format** on the right side above the Employees grid to download the format
- For further guidance, click on the **Help** link. You will be directed to the import guide, which will provide you detailed information on how to add employee in bulk.

Please refer Figure 13 to view the Import Format.



	A	B	C	D	E	F	G	H	I	J	K	L
1	Prefix	First Name	Last Name	Employee Id	Role Type	Email	Business	Departm	Reporting	Job Title	Position	Employment Status
2	Mr	Grame	Smith	0411	manager	gsmith@example.com	SAU	EMD	EMPP0002	MGR	Manager	PERM
3	Mr	Hansie	Cronje	2359	employee	hcronje@example.com	SAU	EMD	EMPP0002	EPM	Employee	PERM
4												
5												
6												
7												

Figure 13

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

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

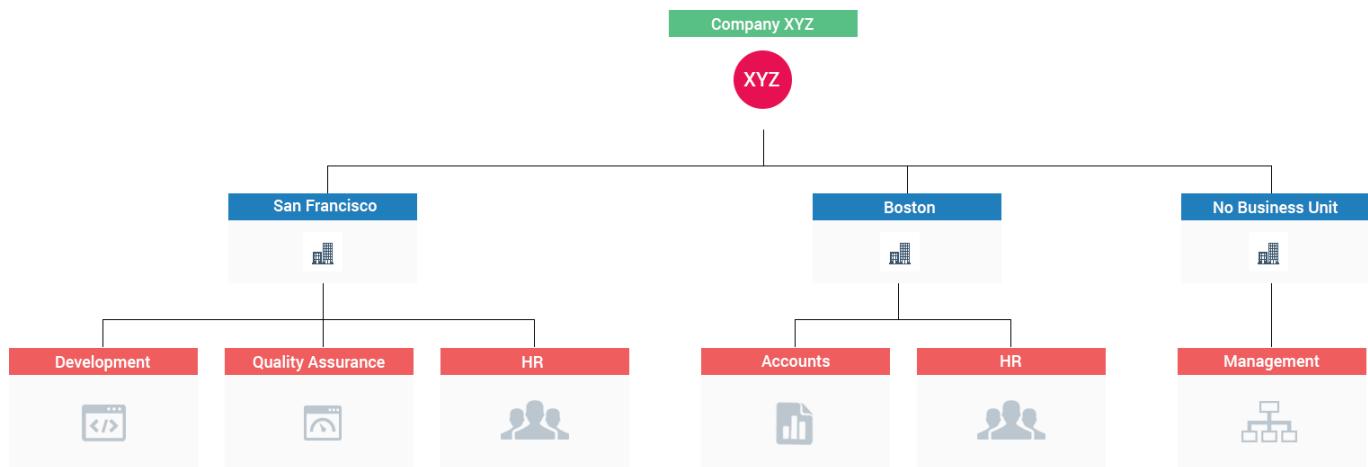
For example: <http://example.com/sentrifugo/index.php/cronjob>



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

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

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



1.5.1 Adding Business Units

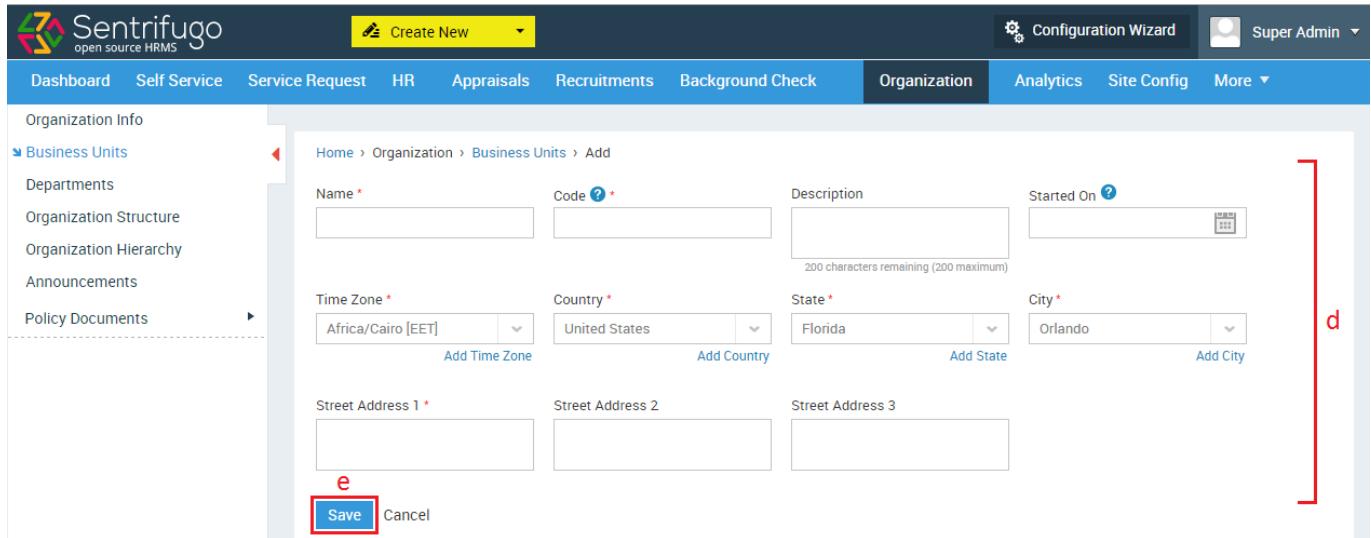
Please refer Figure 14.

The screenshot shows the Sentrifugo web interface. The top navigation bar includes links for 'Create New', 'Configuration Wizard', 'Super Admin', and several menu items: 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 left, a sidebar lists 'Organization Info' with a red box around 'Business Units' (also highlighted with a red box), 'Departments', 'Organization Structure', 'Organization Hierarchy', 'Announcements', and 'Policy Documents'. The main content area displays the 'Business Units' page. It features a table with columns: Action, Name, Code, Started On, Street Address, City, State, Country, and Time zone. Two rows are listed: 'Orange Blossom' (Code: ORB) and 'Avenue' (Code: AVE). At the bottom right of the table is a red box around the '+Add' button. Navigation links at the top of the content area include 'Home > Organization > Business Units' and 'Pin to shortcuts'. A footer at the bottom indicates 'Records per page: 20'.

Figure 14

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

Please refer Figure 15.



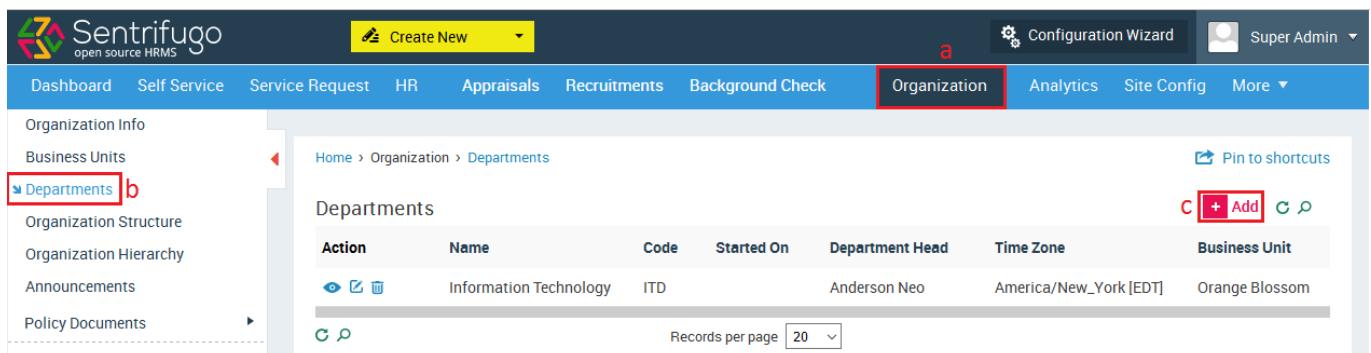
The screenshot shows the 'Organization' tab selected in the top navigation bar. On the left, a sidebar lists 'Organization Info', 'Business Units' (which is active and highlighted), 'Departments', 'Organization Structure', 'Organization Hierarchy', 'Announcements', and 'Policy Documents'. The main content area shows a form for adding a Business Unit. The fields include 'Name' (required), 'Code' (with a question mark icon), 'Description' (with a character count of 200/200), 'Started On' (with a calendar icon), 'Time Zone' (set to 'Africa/Cairo [EET]'), 'Country' (set to 'United States'), 'State' (set to 'Florida'), and 'City' (set to 'Orlando'). Below these are three address fields: 'Street Address 1', 'Street Address 2', and 'Street Address 3'. At the bottom are 'Save' and 'Cancel' buttons, with 'Save' being highlighted by a red box. A red bracket labeled 'd' points to the right side of the form, and a red box labeled 'e' points to the 'Save' button.

Figure 15

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

1.5.2 Adding Departments

Please refer Figure 16.

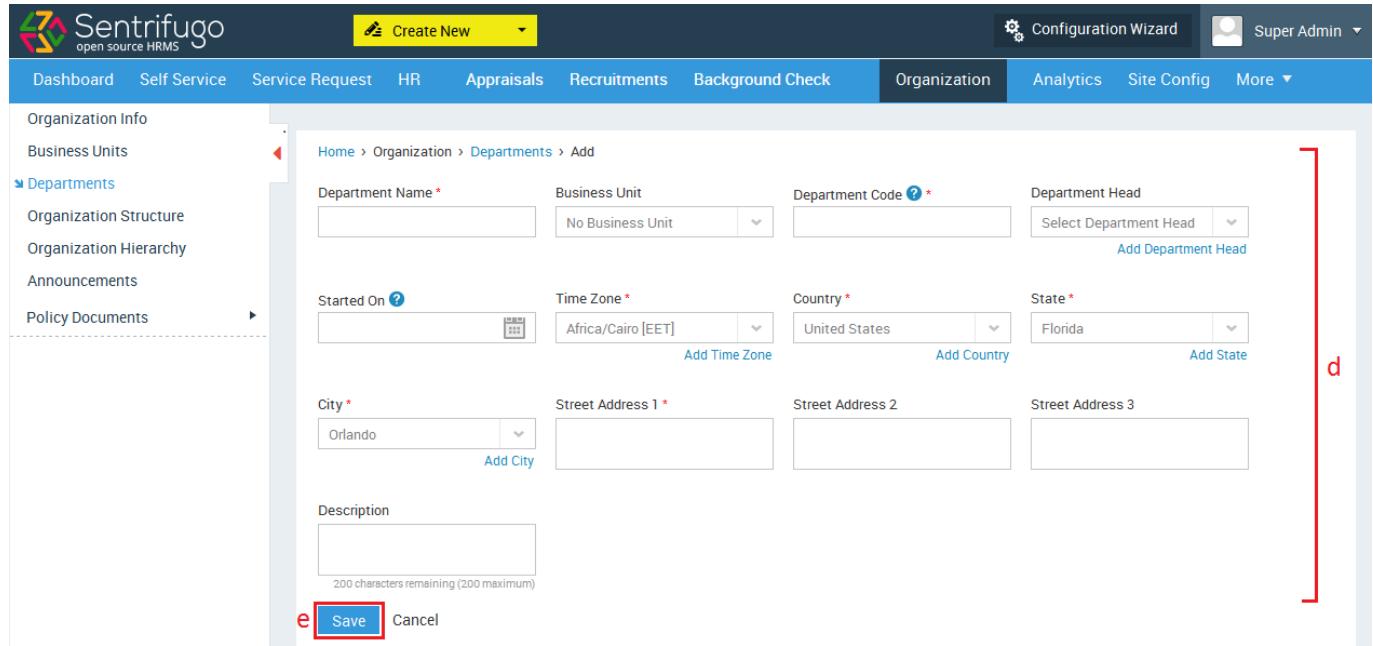


The screenshot shows the 'Organization' tab selected in the top navigation bar. On the left, a sidebar lists 'Organization Info', 'Business Units' (highlighted with a red box), 'Departments' (also highlighted with a red box), 'Organization Structure', 'Organization Hierarchy', 'Announcements', and 'Policy Documents'. The main content area displays a table of departments. The columns are 'Action', 'Name', 'Code', 'Started On', 'Department Head', 'Time Zone', and 'Business Unit'. One row is visible: 'Information Technology' (Name), 'ITD' (Code), 'Anderson Neo' (Department Head), 'America/New_York [EDT]' (Time Zone), and 'Orange Blossom' (Business Unit). At the bottom of the table are 'Records per page' dropdown and search/filter icons. A red box labeled 'a' is at the top right, another red box labeled 'b' is on the sidebar next to 'Departments', and a red box labeled 'c' is on the right side of the table next to '+Add'.

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.



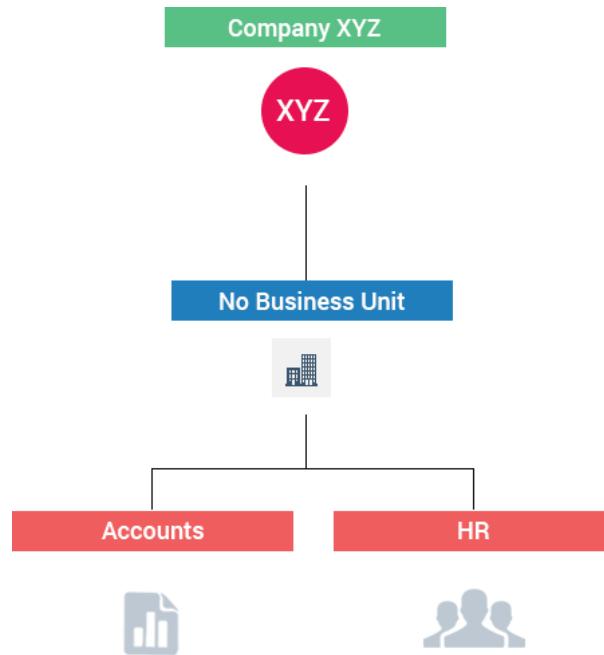
The screenshot shows the Sentrifugo HRMS interface for adding a new department. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization (selected), Analytics, Site Config, and More. The left sidebar has sections for Organization Info, Business Units, Departments (selected), Organization Structure, Organization Hierarchy, Announcements, and Policy Documents. The main content area shows a form for creating 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' (United States), and 'State' (Florida). There are 'Add Time Zone', 'Add Country', and 'Add State' buttons. Further down are fields for 'City' (Orlando), 'Street Address 1' (empty), 'Street Address 2' (empty), and 'Street Address 3' (empty). A 'Description' text area is present with a character count of 200/200. At the bottom are 'Save' and 'Cancel' buttons, with 'Save' being highlighted by a red box labeled 'e'.

Figure 17

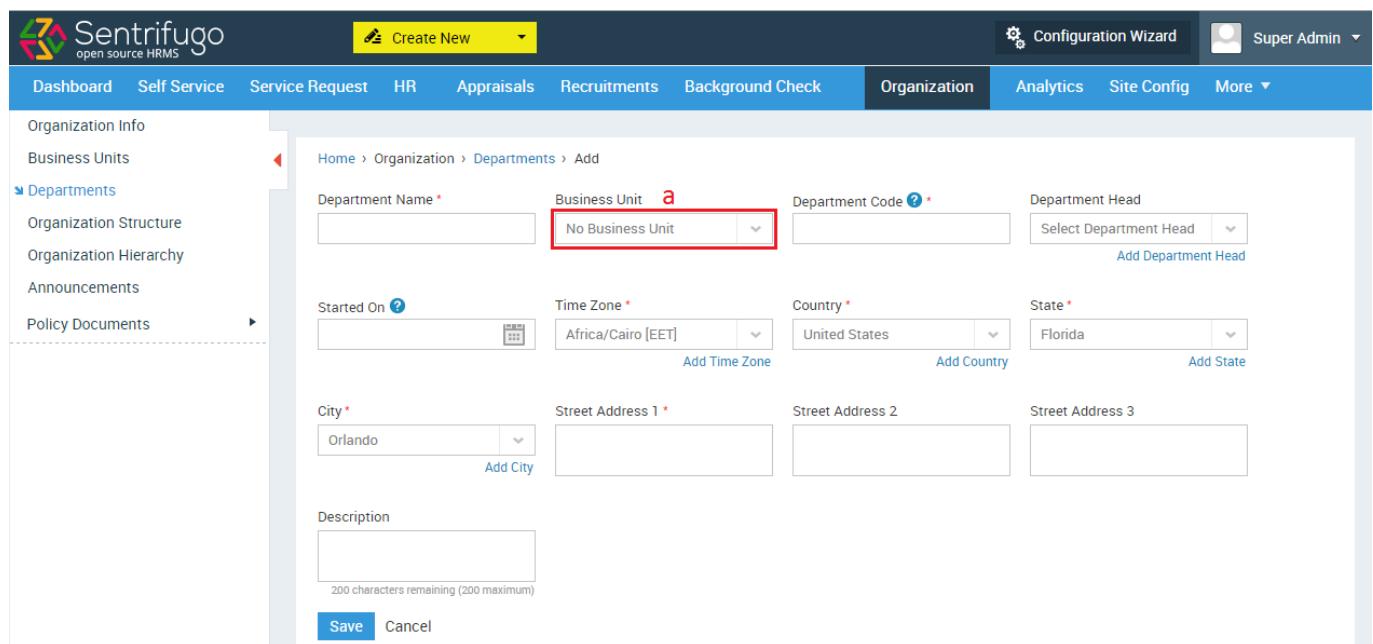
- d. Enter the necessary details
- e. Click **Save** button to create a new department

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 web application's "Organization" section. On the left, there's a sidebar with links like "Organization Info", "Business Units", "Departments" (which is currently selected), "Organization Structure", "Organization Hierarchy", "Announcements", and "Policy Documents". The main content area has a breadcrumb navigation: Home > Organization > Departments > Add. The form fields include:

- Department Name ***: An input field.
- Business Unit**: A dropdown menu where "No Business Unit" is selected and highlighted with a red box.
- Department Code ? ***: An input field.
- Department Head**: A dropdown menu with "Select Department Head" and "Add Department Head" options.
- Started On ?**: A date picker.
- Time Zone ***: A dropdown menu showing "Africa/Cairo [EET]".
- Country ***: A dropdown menu showing "United States".
- State ***: A dropdown menu showing "Florida".
- City ***: An input field showing "Orlando".
- Street Address 1 ***: An input field.
- Street Address 2**: An input field.
- Street Address 3**: An input field.
- Description**: A text area with placeholder text "200 characters remaining (200 maximum)".
- Save** and **Cancel** buttons at the bottom.

Figure 18

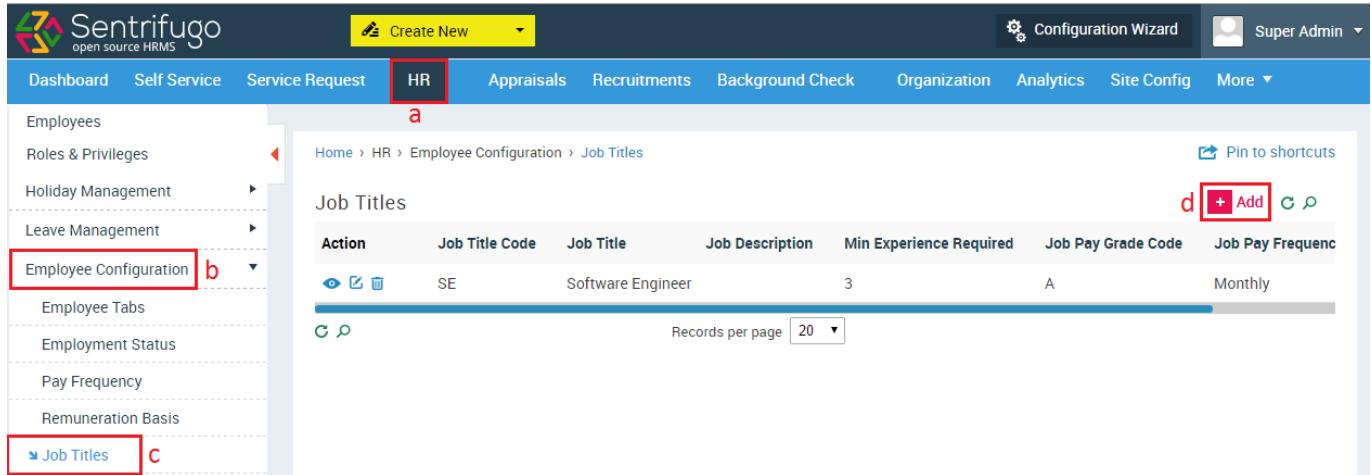
a. Select the option 'No Business Unit'

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.

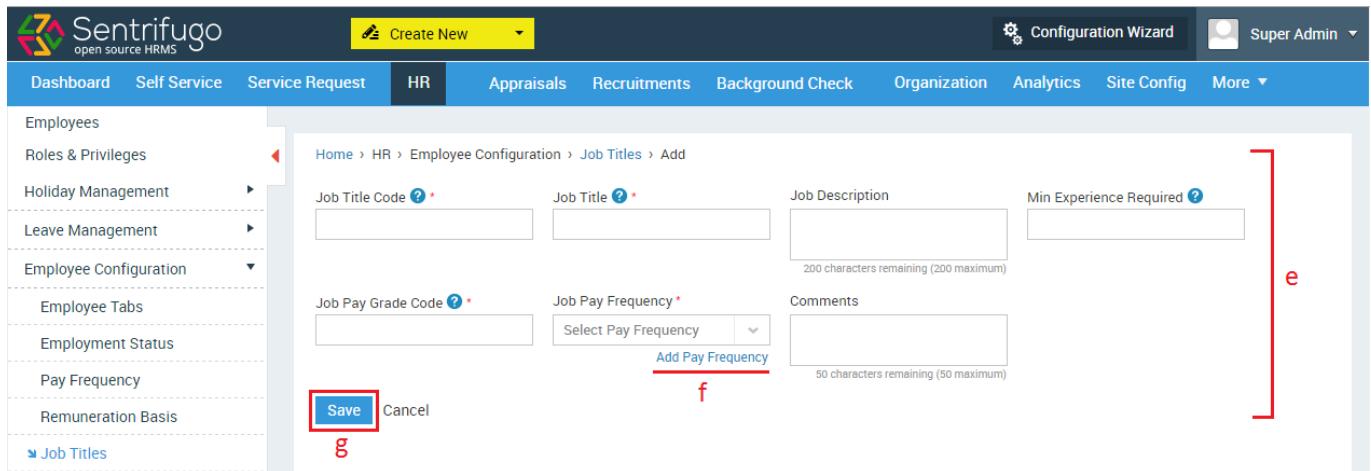
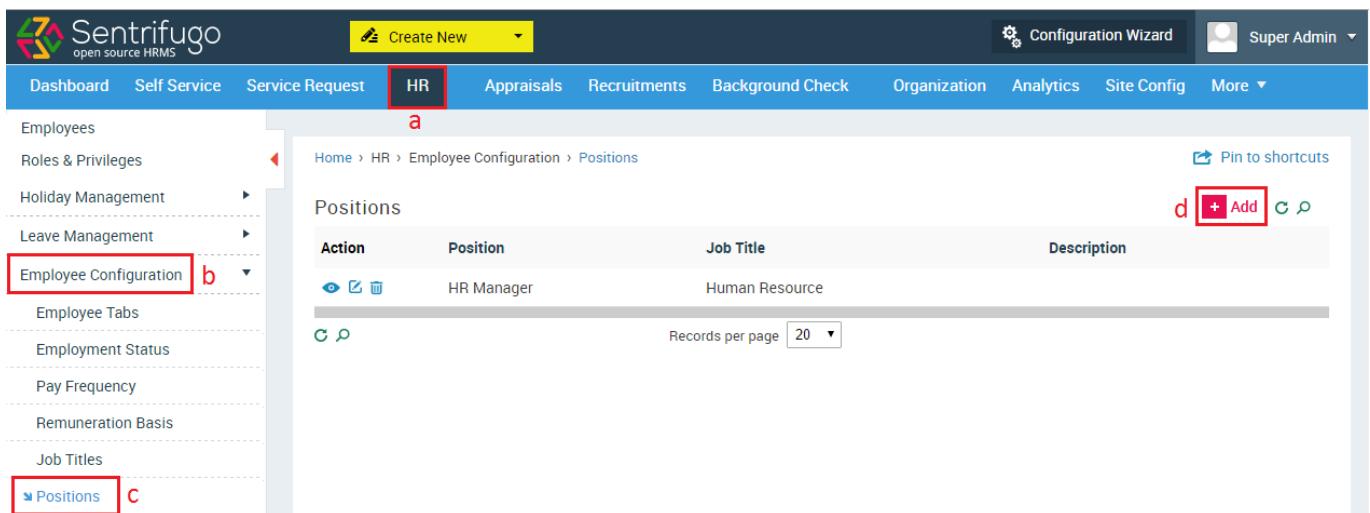


Figure 20

- 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.

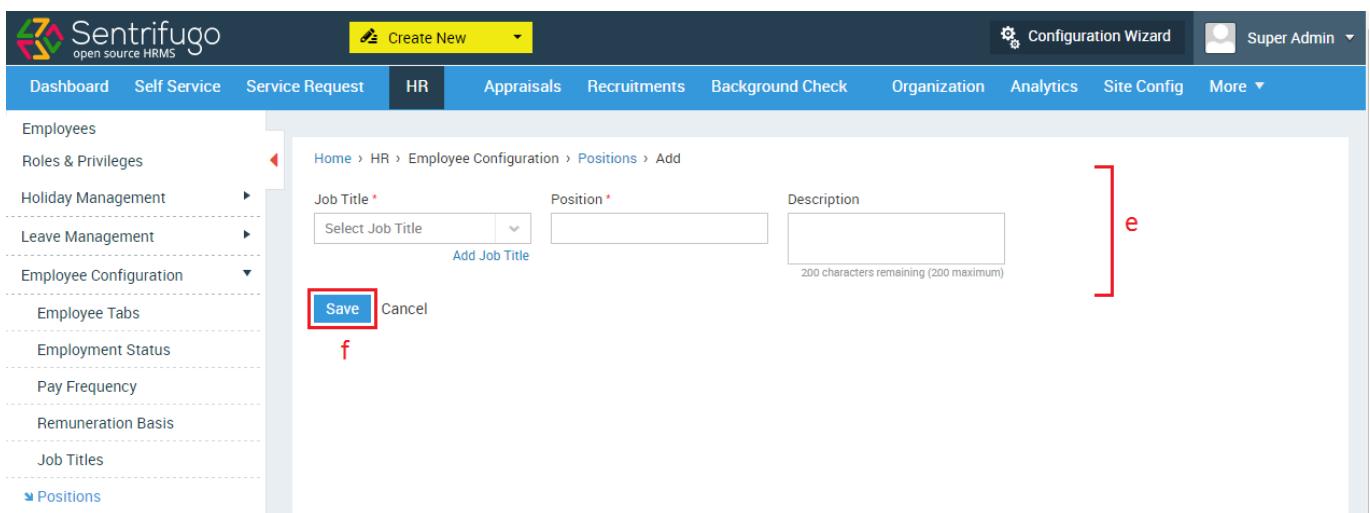


The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes 'Create New' (dropdown), 'Configuration Wizard', 'Super Admin' (dropdown), and links for Dashboard, Self Service, Service Request, HR (highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A left sidebar menu lists Employee-related modules like Employees, Roles & Privileges, Holiday Management, Leave Management, Employee Configuration (highlighted with a red box), Employee Tabs, Employment Status, Pay Frequency, Remuneration Basis, Job Titles, and Positions (highlighted with a red box). The main content area displays a breadcrumb path: Home > HR > Employee Configuration > Positions. It shows a table with columns: Action, Position, Job Title, and Description. One record is listed: HR Manager, Human Resource. Below the table are 'Records per page' dropdown and 'C P' buttons. On the right side, there are 'Pin to shortcuts' and '+ Add' buttons.

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 sidebar are identical to Figure 21. The main content area shows a form with fields: 'Job Title *' (dropdown with 'Select Job Title' and 'Add Job Title' button), 'Position *' (text input field), and 'Description' (text area with '200 characters remaining (200 maximum)'). Below the form are 'Save' and 'Cancel' buttons. A red bracket labeled 'e' spans from the 'Description' field to the 'Save' button. A red box labeled 'f' highlights the 'Save' button.

Figure 22

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



You can create a Position only after creating a Job Title

2. Dashboard

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

2.1 How do I add Widgets?

Please refer Figure 23.

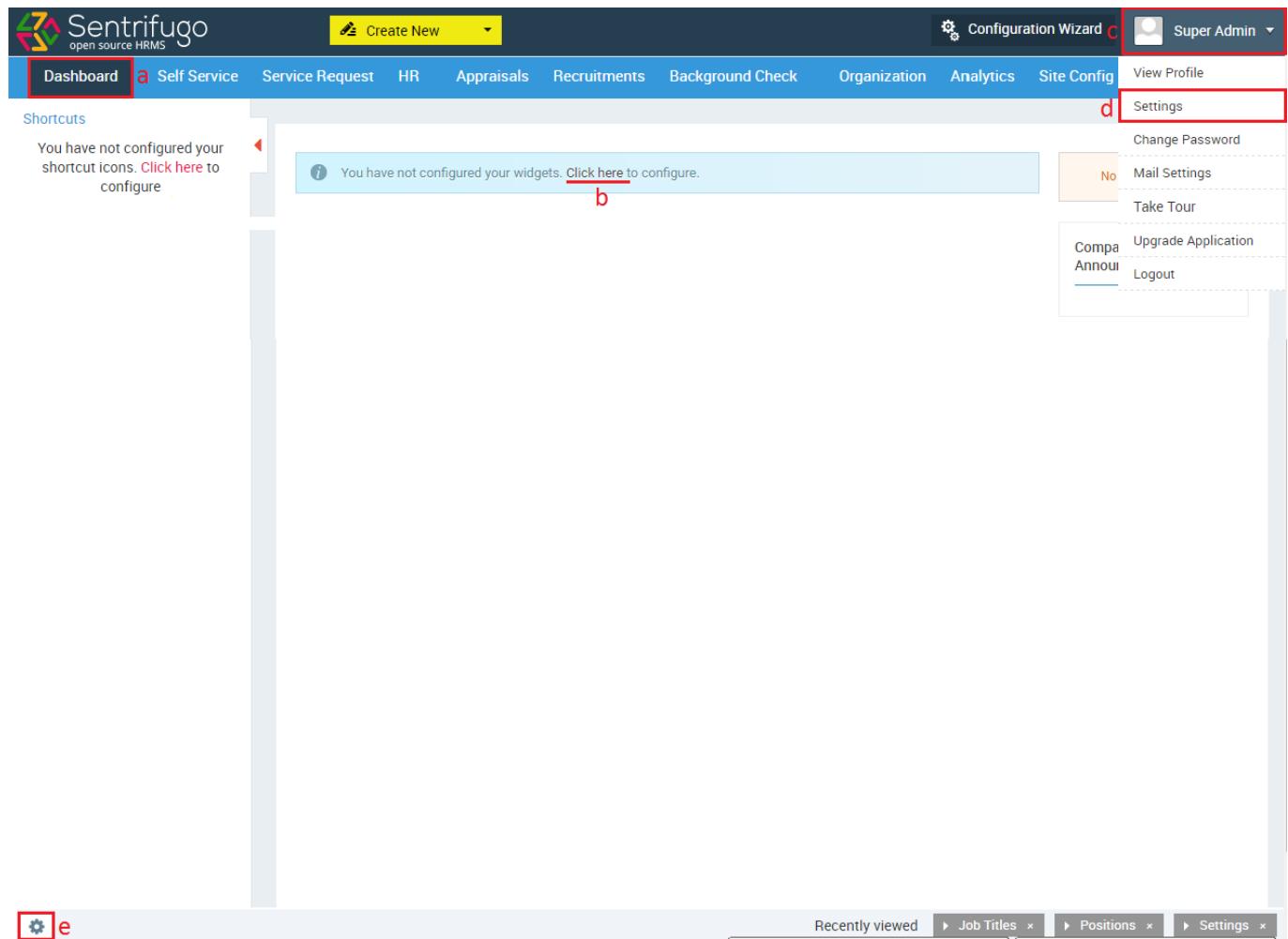


Figure 23

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

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

Or

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

Or

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

Please refer Figure 24.

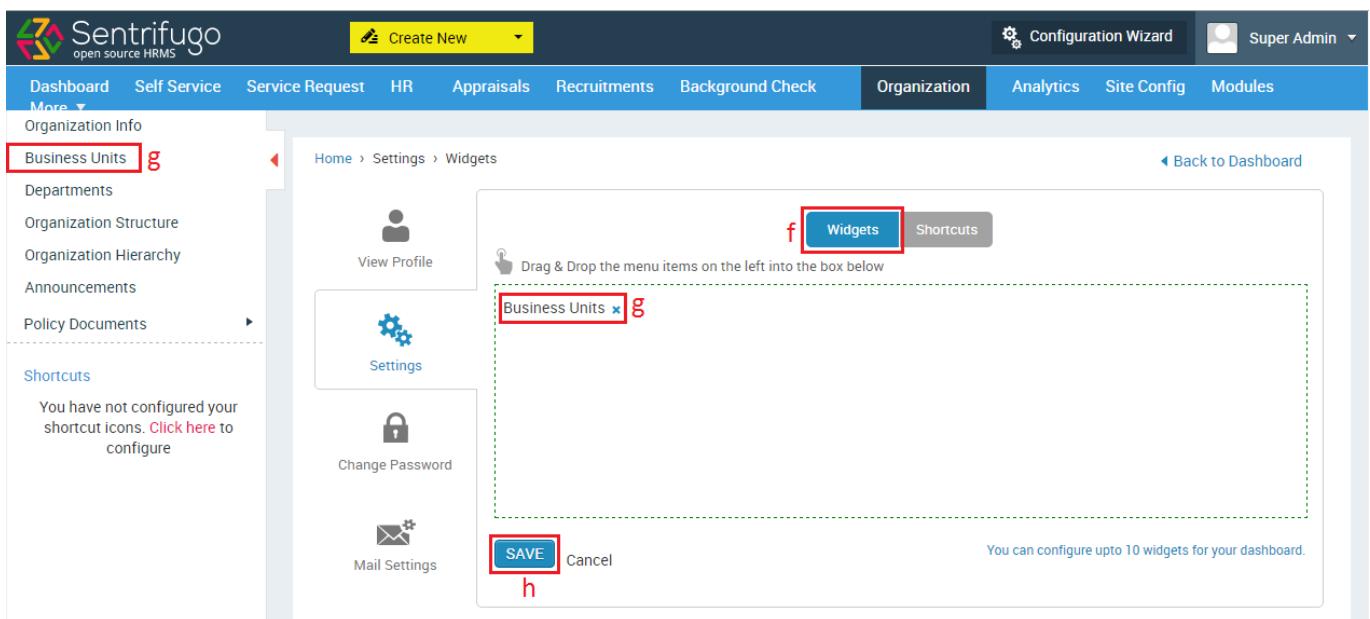


Figure 24

(Common for all)

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

2.2 How do I add Shortcuts?

Please refer Figure 25.

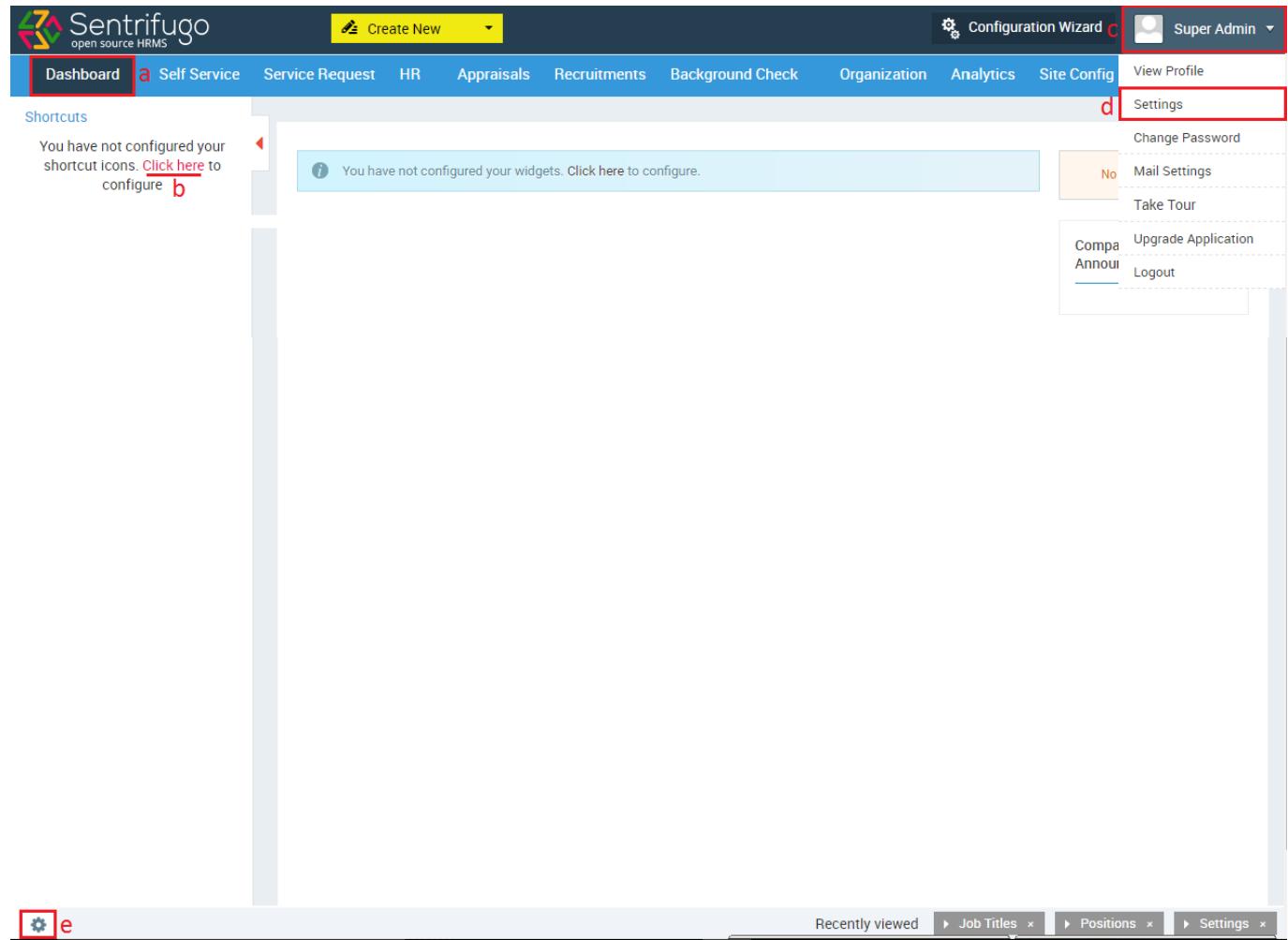


Figure 25

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

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

Or

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

Or

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

Please refer Figure 26.

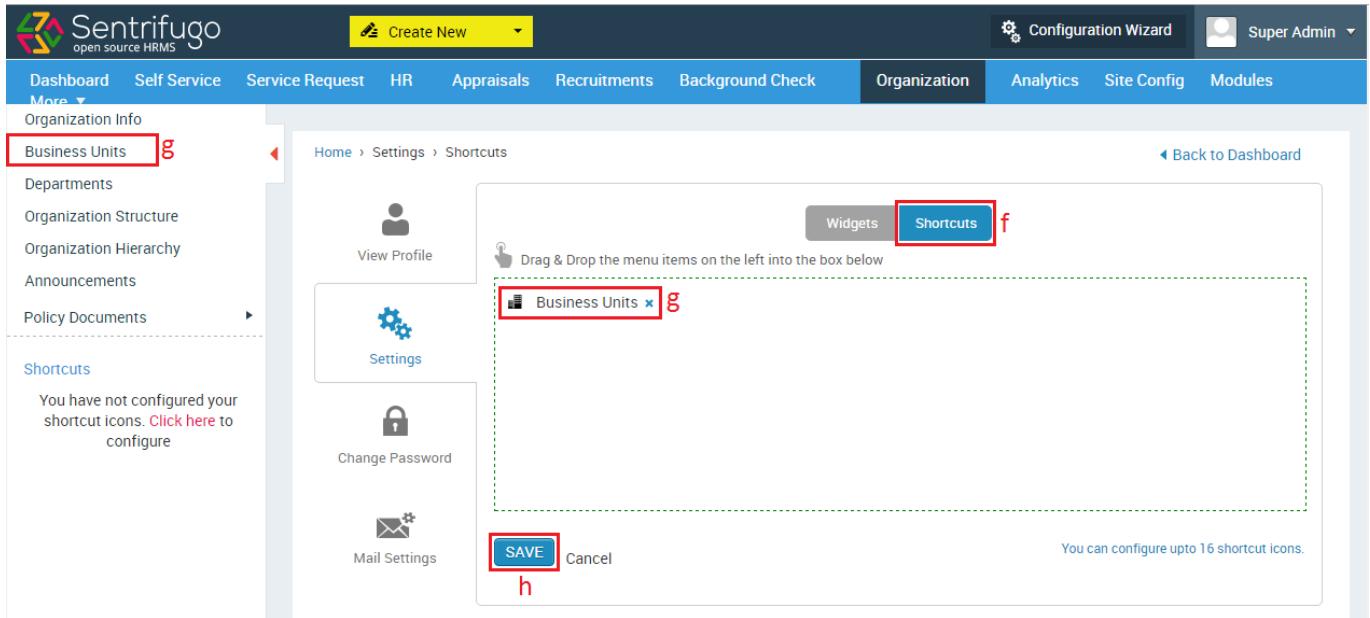


Figure 26

(Common for all)

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

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

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](#)

1
Approved Requisitions
[View All](#)

1
Manager Appraisal
[View](#)

7
Roles & Privileges

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

[View All](#)

1
Manage Holiday Group

New Group (1)

[View All](#)

1
Manage Holidays

20.09.2016 (Diwali)

[View All](#)

4
Categories

System Administration
Accounts
Software
Hardware

[View All](#)

5
Appraisal Questions

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

[View All](#)

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

!

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

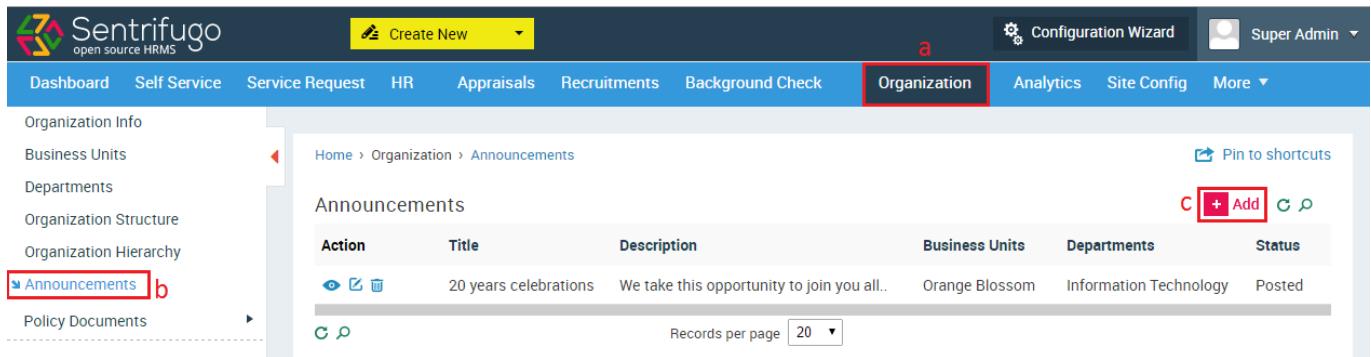
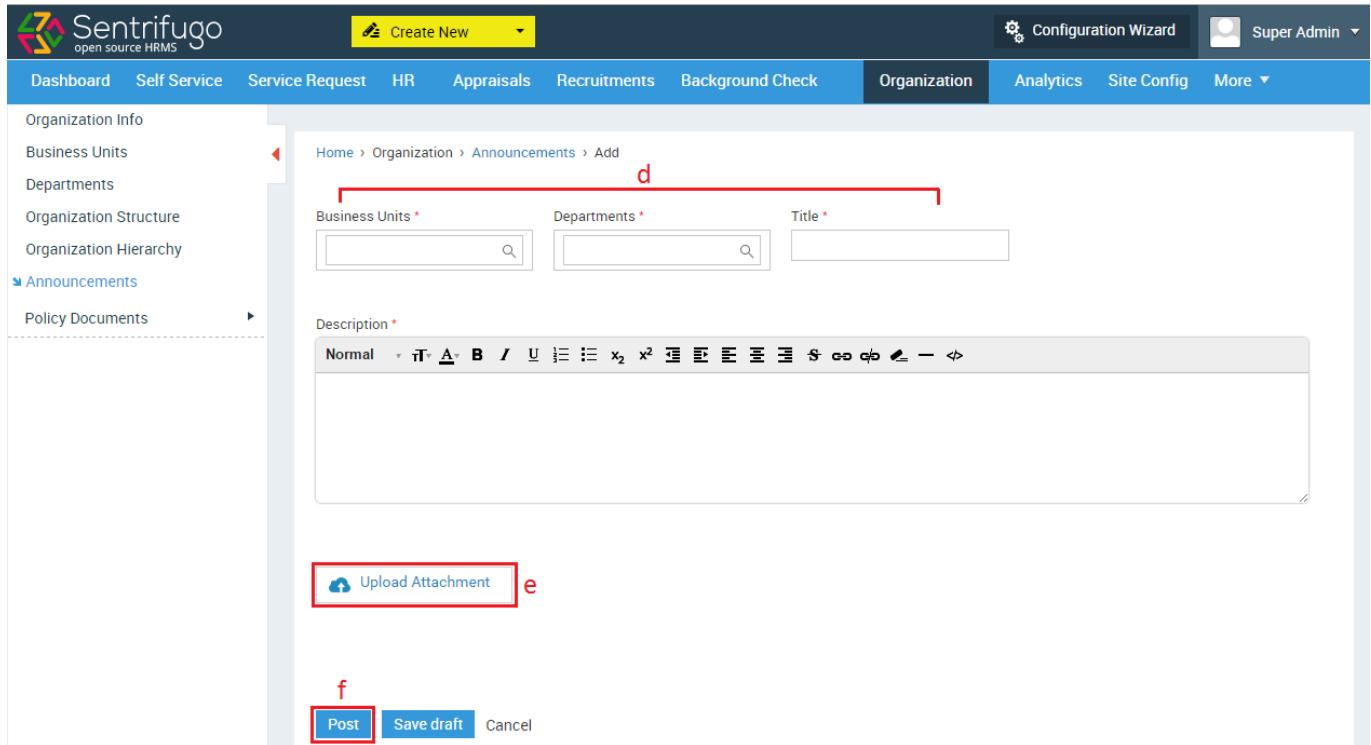


Figure 27

- 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 Sentrifugo HRMS interface with the 'Organization' tab selected. On the left, there's a sidebar with links like 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Background Check', 'Announcements' (which is currently active), and 'Policy Documents'. The main content area has a breadcrumb path: Home > Organization > Announcements > Add. It includes fields for 'Business Units', 'Departments', and 'Title'. Below these is a rich text editor for 'Description'. A red box labeled 'd' highlights the 'Business Units' field. A red box labeled 'e' highlights the 'Upload Attachment' button. At the bottom, there are buttons for 'Post' (highlighted with a red box), 'Save draft', and 'Cancel'.

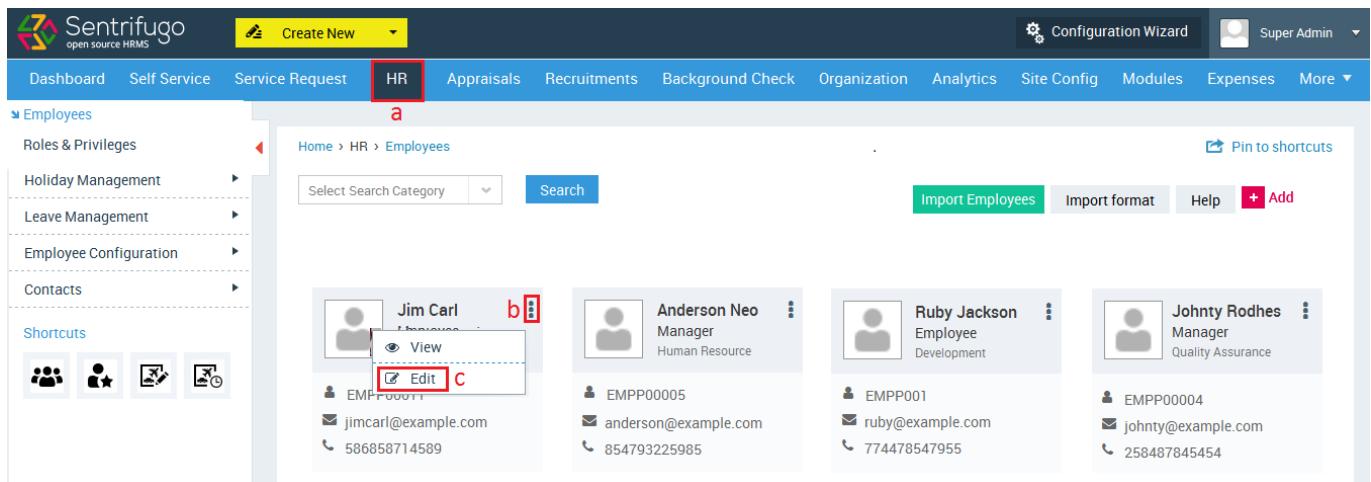
Figure 28

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

2.4 How do I add Birthday Announcements?

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

Please refer Figure 29.



The screenshot shows the Sentrifugo HRMS interface with the 'HR' tab selected. The left sidebar has links for 'Employees', 'Roles & Privileges', 'Holiday Management', 'Leave Management', 'Employee Configuration', and 'Contacts'. The main content area shows a list of employees with their names, roles, and contact information. Jim Carl is highlighted with a red box around his 'Edit' button. Other employees listed include Anderson Neo, Ruby Jackson, and Johnty Rodhes.

Figure 29

To add an employee's birthday:

- Click **HR** in the top menu
- Click **More Actions** icon
- Click **Edit** icon against any employee's name

Please refer Figure 30.

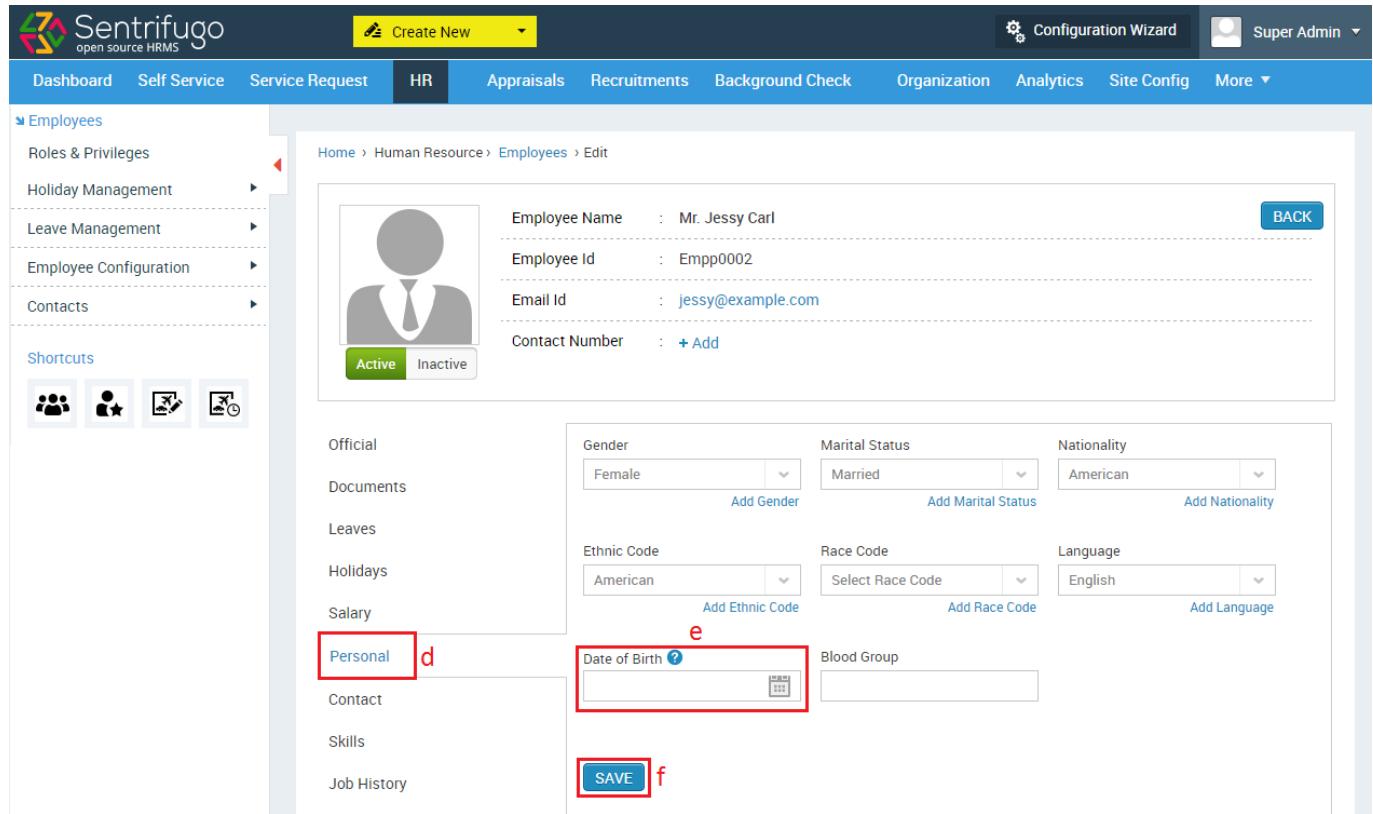
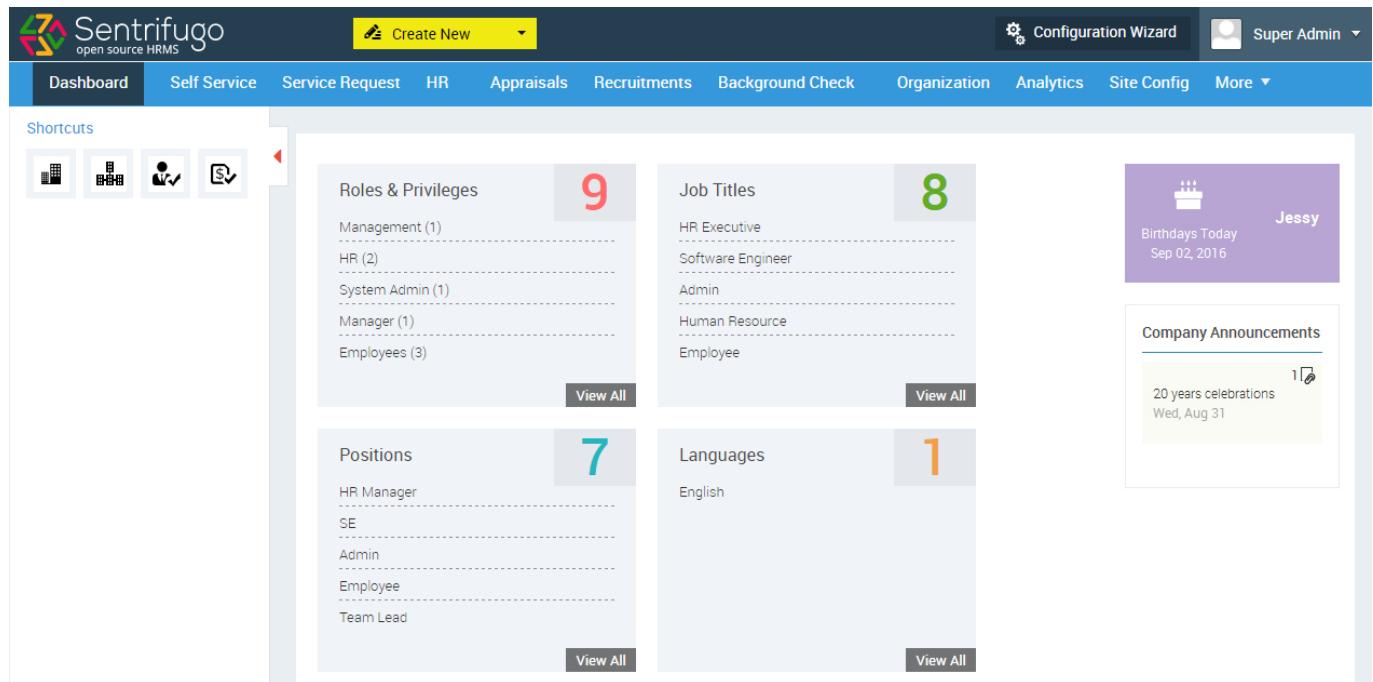


Figure 30

- 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. To the right of these are four main statistics boxes:

- Roles & Privileges** (9): Management (1), HR (2), System Admin (1), Manager (1), Employees (3). A 'View All' button is at the bottom.
- Job Titles** (8): HR Executive, Software Engineer, Admin, Human Resource, Employee. A 'View All' button is at the bottom.
- Positions** (7): HR Manager, SE, Admin, Employee, Team Lead. A 'View All' button is at the bottom.
- Languages** (1): English. A 'View All' button is at the bottom.

To the right of the statistics boxes is a purple box for 'Jessy' with a birthday announcement: 'Birthdays Today Sep 02, 2016'. Below the statistics boxes is a 'Company Announcements' section with a single item: '20 years celebrations Wed, Aug 31'.

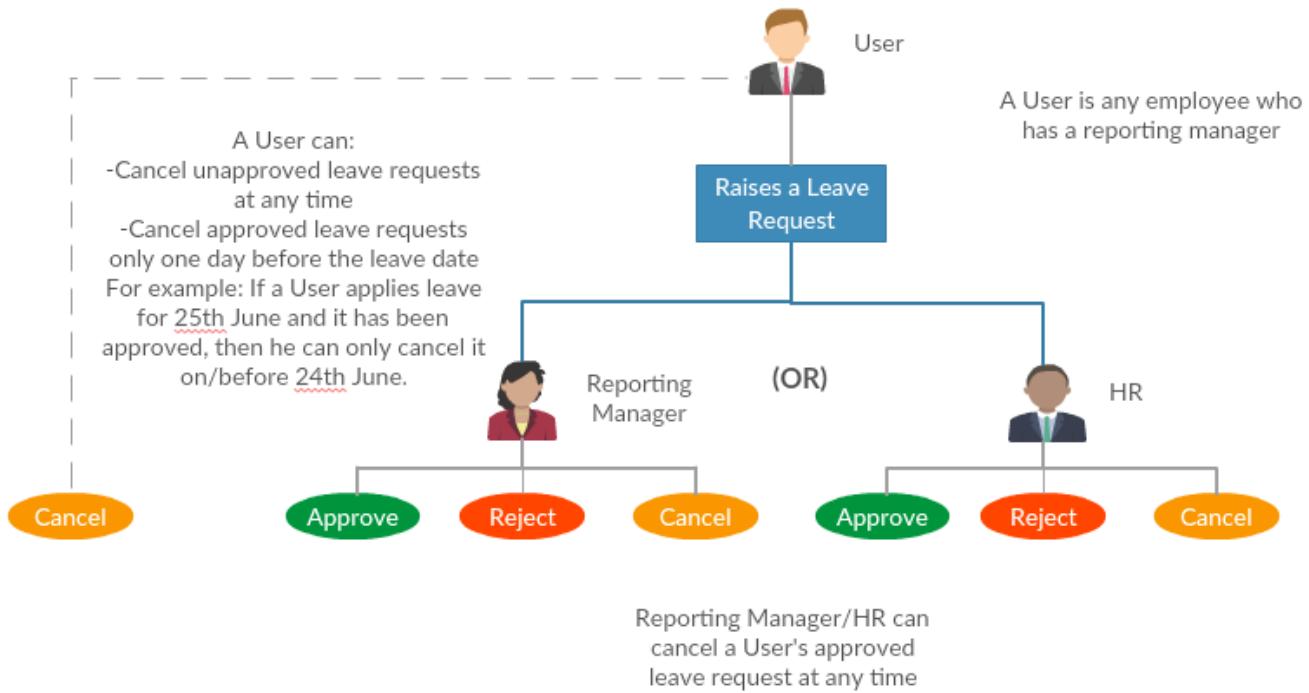
Figure 31



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/HR. Below is the leave management process flowchart.



Process Description:

- A User (Any User who has a reporting manager) raises a leave request.
- The User can cancel his leave request unapproved or approved (one day before the leave date)
- Either the Reporting Manager or HR can approve/reject/cancel (at any time) the leave request.



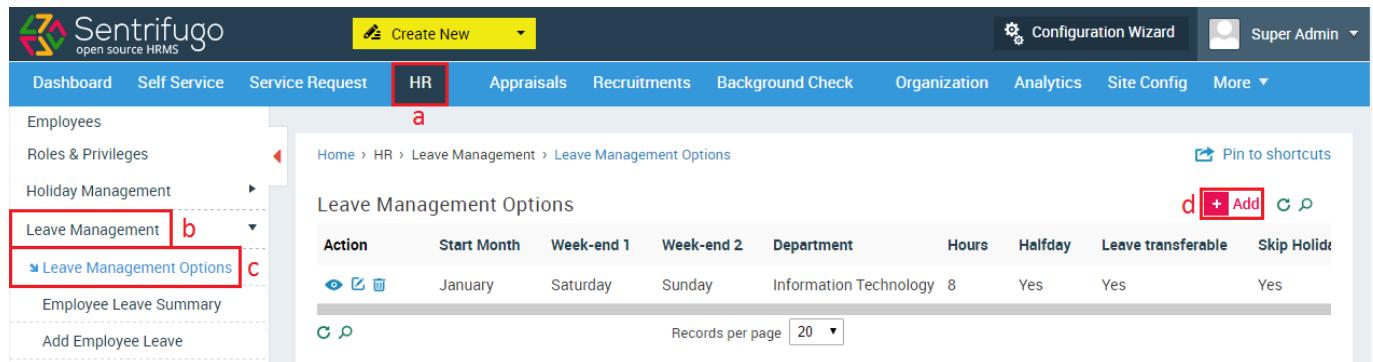
After an approved leave request has been cancelled, the leave(s) are credited back to the user's leave balance.

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
Eye icon	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.

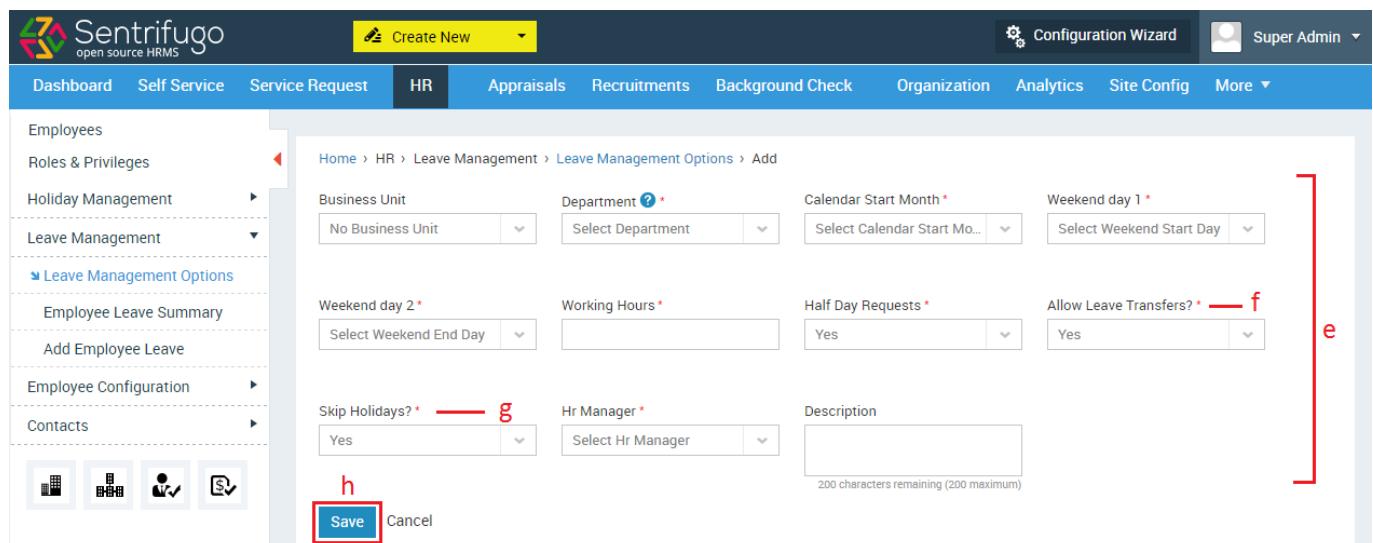


Figure 33

- Fill in the required details

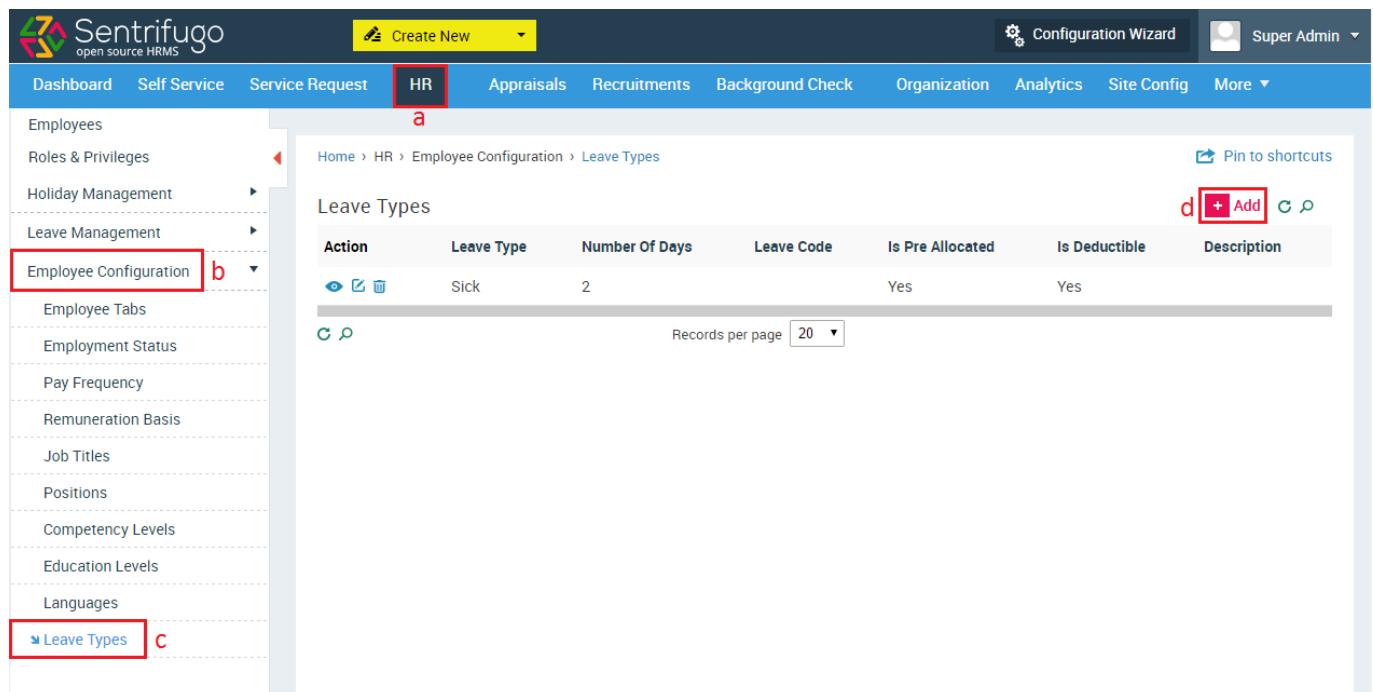
- f. **Allow Leave Transfers:** If there are any unused leaves for an employee in the current year, then by using this option they will be carried forward to the next year.
- g. **Skip Holidays:** If a user applies for a vacation which includes the weekend or any pre-declared holiday, then by using this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

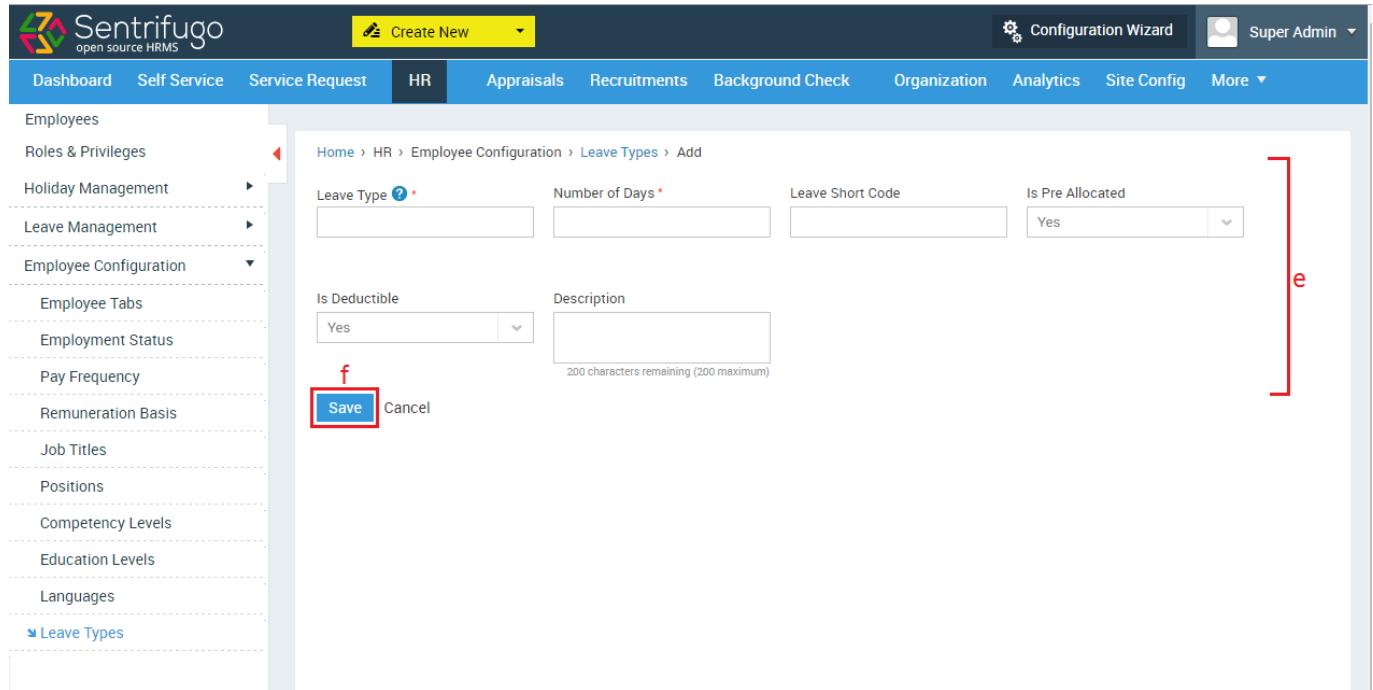


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes the logo, a 'Create New' dropdown, 'Configuration Wizard', and 'Super Admin'. The main menu has tabs for Dashboard, Self Service, Service Request, HR (highlighted with a red box and labeled 'a'), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A left sidebar under 'Employee Configuration' (highlighted with a red box and labeled 'b') lists Employee Tabs, Employment Status, Pay Frequency, Remuneration Basis, Job Titles, Positions, Competency Levels, Education Levels, and Languages. Under 'Leave Management', 'Leave Types' is selected and highlighted with a red box and labeled 'c'. The main content area shows a 'Leave Types' table with one row: Action (eye, edit, delete), Leave Type (Sick), Number Of Days (2), Leave Code (empty), Is Pre Allocated (Yes), Is Deductible (Yes), and Description (empty). A red box highlights the '+ Add' button in the top right of the table area, labeled 'd'.

Figure 34

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

Please refer Figure 35.



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (which is selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists various configuration categories like Employees, Roles & Privileges, Holiday Management, Leave Management, Employee Configuration, and Leave Types (which is currently selected). The main content area displays a form titled 'Leave Type' for adding a new leave type. The form fields include 'Leave Type' (with a question mark icon), 'Number of Days' (marked with a red asterisk), 'Leave Short Code', 'Is Pre Allocated' (set to 'Yes'), 'Is Deductible' (set to 'Yes'), 'Description' (with a note: '200 characters remaining (200 maximum)'), and 'Save' and 'Cancel' buttons. A red bracket labeled 'e' covers the 'Is Pre Allocated' field and the 'Description' text area. A red box labeled 'f' covers the 'Save' button.

Figure 35

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



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

3.3 How do I allocate Leave to Employees?

There are two ways to allocate leaves to employees:

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

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

Please refer Figure 36

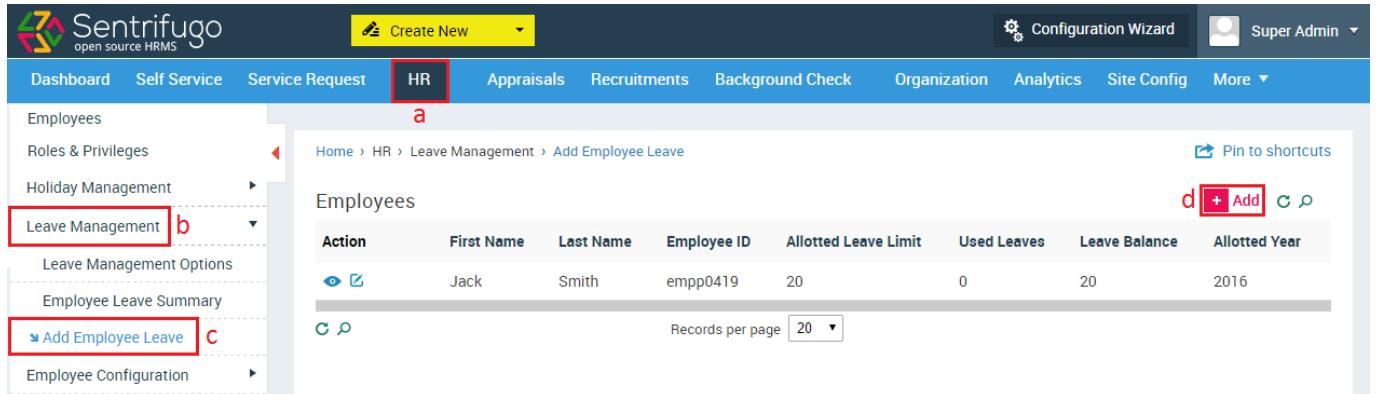


Figure 36

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

Please refer Figure 37

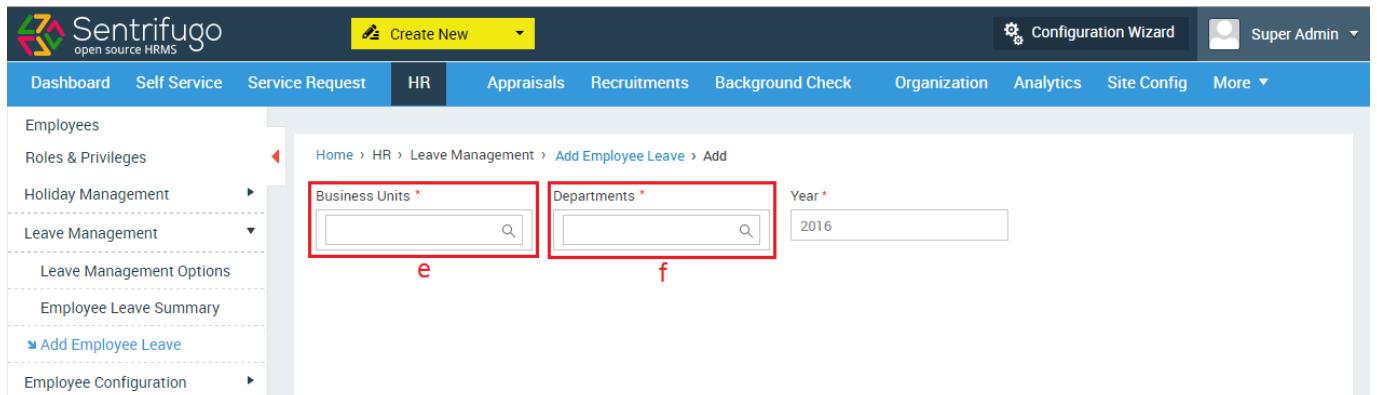


Figure 37

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

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

Please refer Figure 38

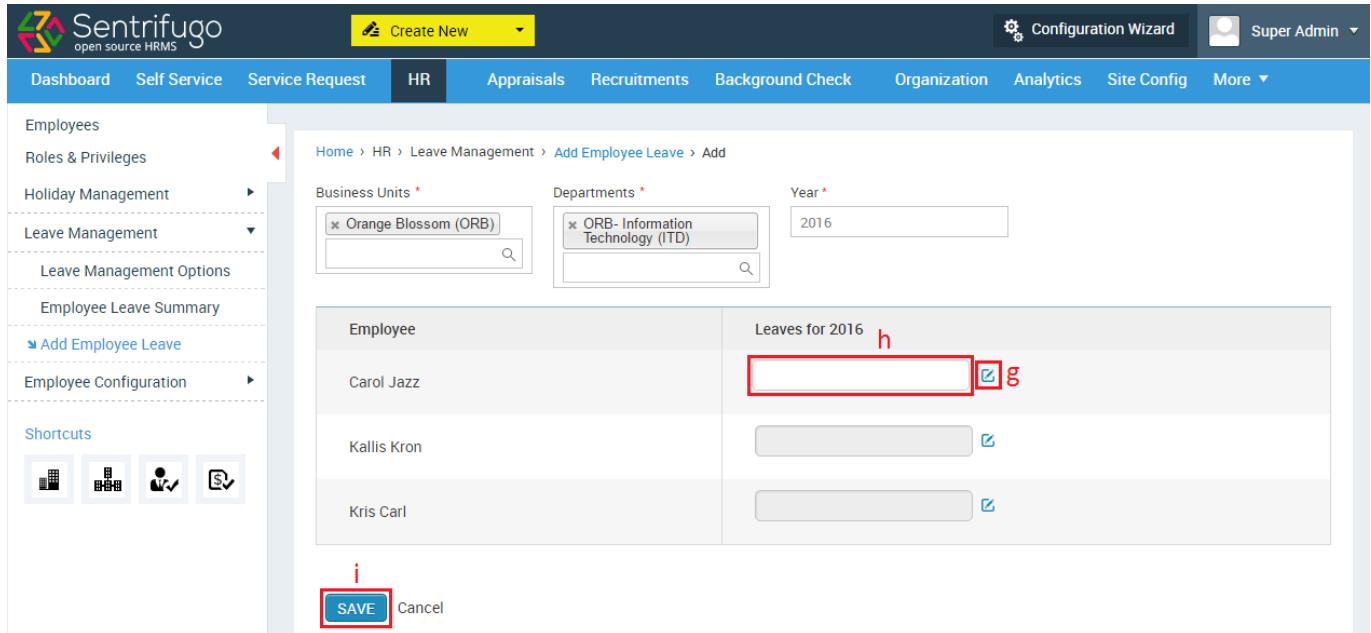


Figure 38

- 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

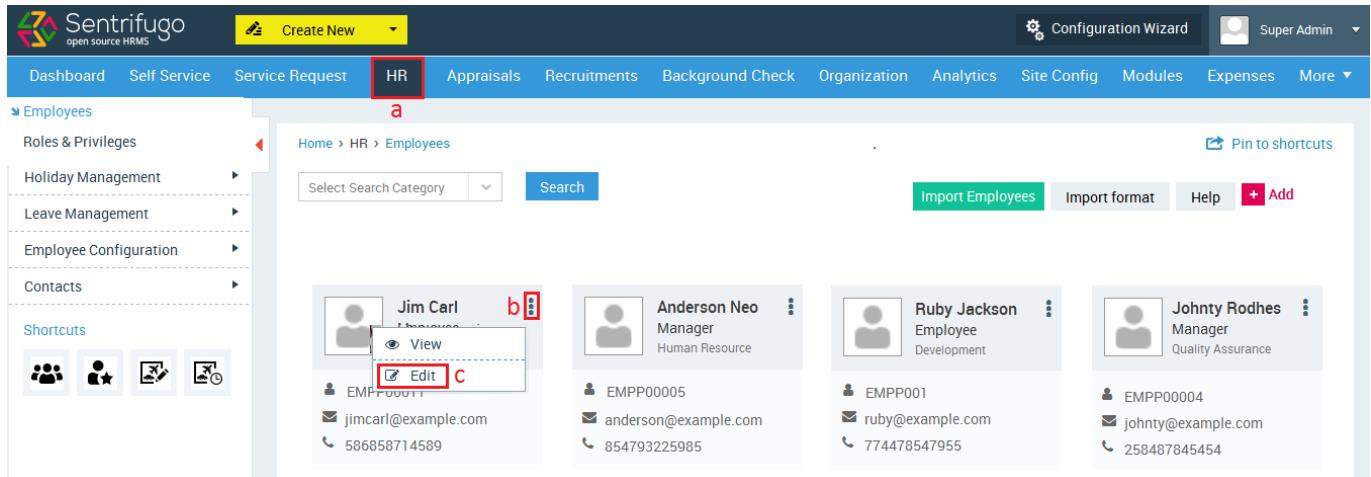


Figure 39

- a. Click **HR** in the top menu
- b. Click **More Actions** icon

- c. Click **Edit** icon

Please refer Figure 40

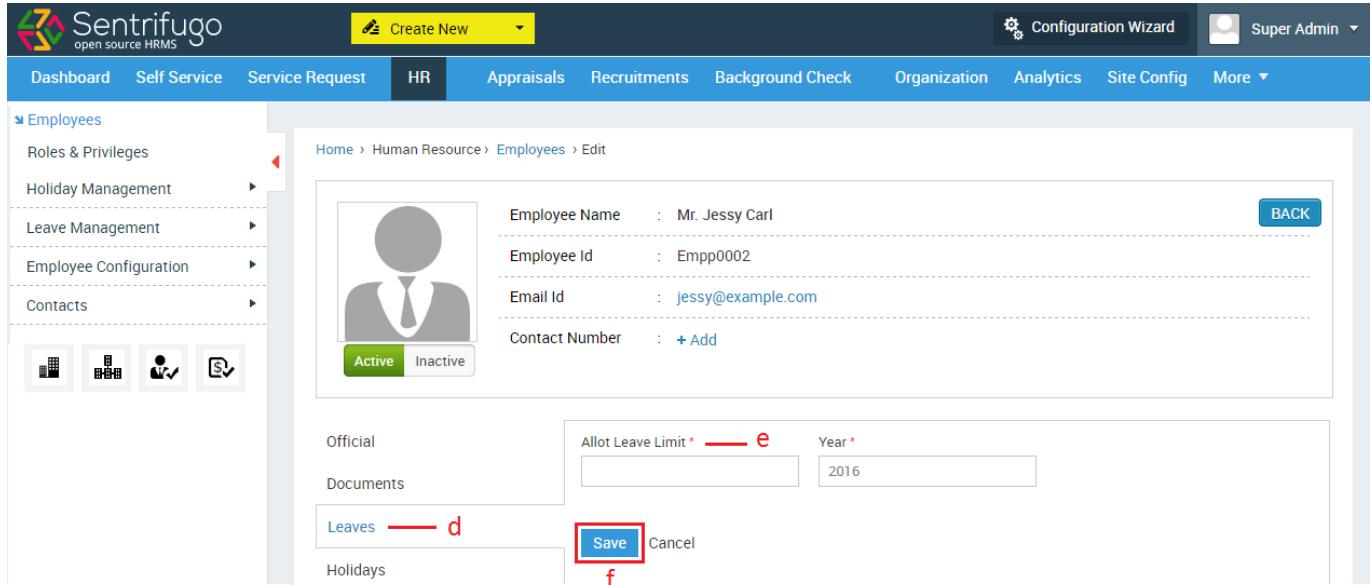


Figure 40

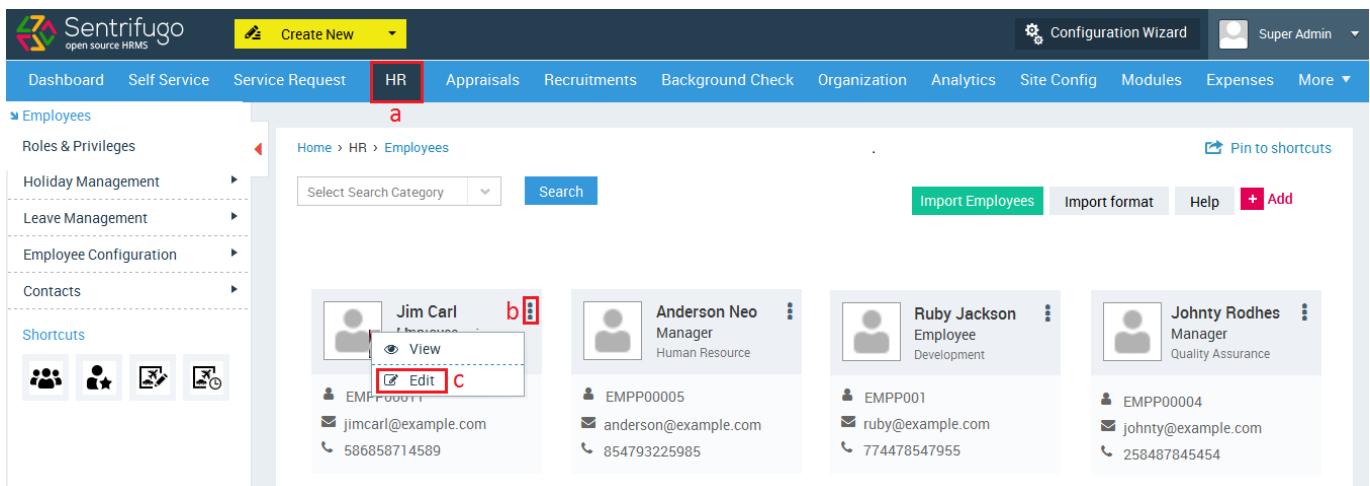
- d. Click **Leaves** on the left menu panel (left side of the form)
 e. Enter the number of days for this employee
 f. Click **SAVE** button



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

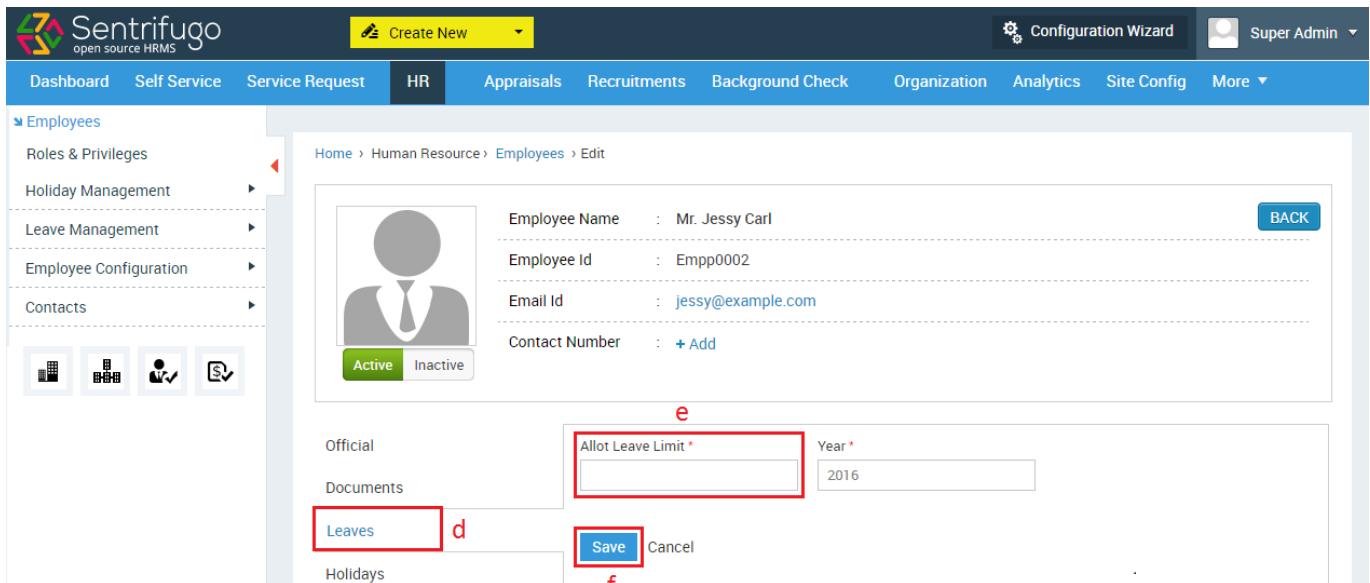


The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes 'Create New', 'Configuration Wizard', 'Super Admin', and other links. The main menu has categories like Dashboard, Self Service, Service Request, HR (highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. On the left, there's a sidebar with Employee management options: Roles & Privileges, Holiday Management, Leave Management, Employee Configuration, and Contacts. Below these are Shortcuts for users. The main content area displays a list of employees with their names, roles, and contact details. Jim Carl is selected, and his card shows a 'View' link, an 'Edit' icon with a red box (labeled 'b'), and an 'Edit' button with a red box (labeled 'c'). Other employees listed are Anderson Neo, Ruby Jackson, and Johny Rodhes.

Figure 41

- Click **HR** in the top menu
- Click **More Actions** icon
- Click **Edit** icon

Please refer Figure 42



The screenshot shows the 'Edit' screen for an employee named Mr. Jessy Carl. The left sidebar has tabs for Active (green) and Inactive (grey). The main form displays basic information: 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 (selected with a red box labeled 'd'), and Holidays. Under Leaves, there is a 'Leaves' tab, an 'Allot Leave Limit' input field with a red box (labeled 'e'), a 'Year' dropdown set to 2016, and a 'Save' button with a red box (labeled 'f') and a 'Cancel' button.

Figure 42

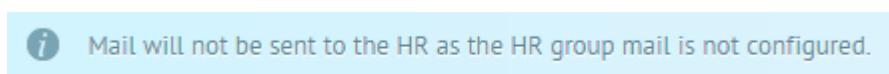
- Click **Leaves** on the left menu panel (on the left side of the form)
- Enter the number of days with a **'-' sign preceding the number** for the employee
- Click **SAVE** button



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:



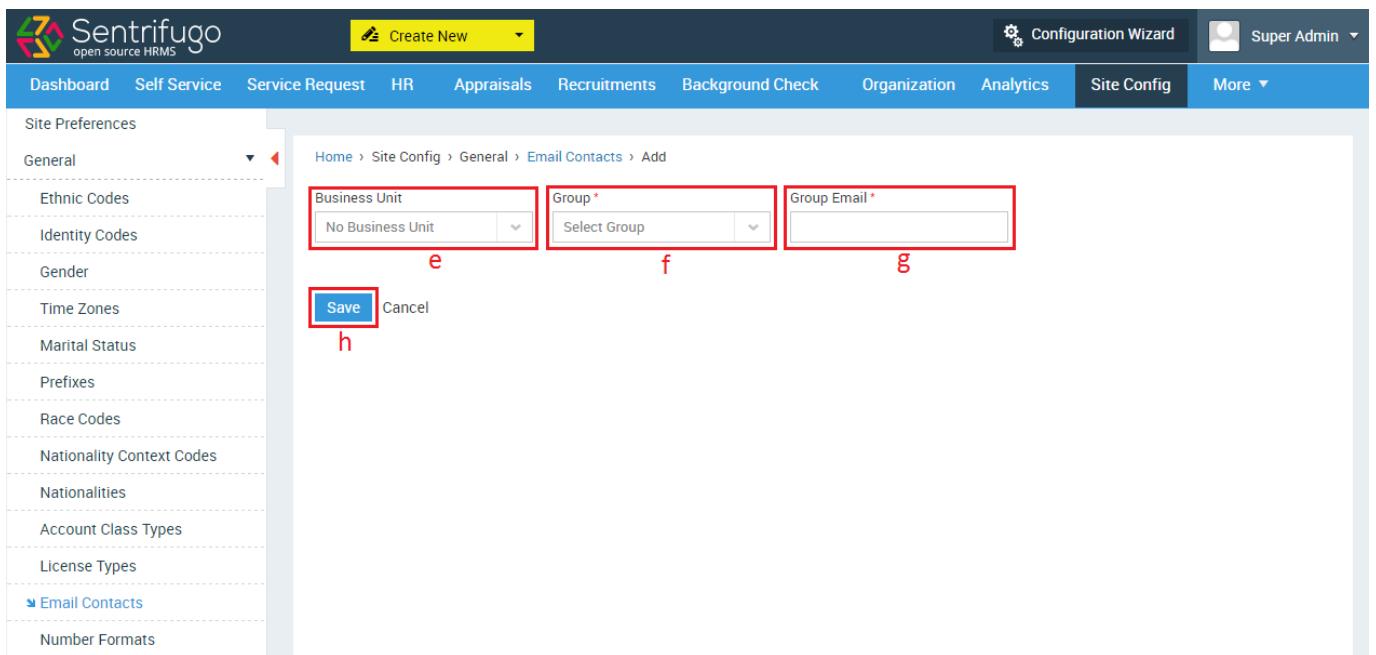
Please refer Figure 43

Action	Business Unit	Group	Group Email
	Orange Blossom	Requisition - HR Group	Jessy@example.com

Figure 43

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

Please refer Figure 44



The screenshot shows the 'Email Contacts' configuration screen. On the left, there's a sidebar with various site preferences like Ethnic Codes, Identity Codes, Gender, Time Zones, etc. The main area shows a breadcrumb path: Home > Site Config > General > Email Contacts > Add. There are three input fields: 'Business Unit' (containing 'No Business Unit'), 'Group*' (containing 'Select Group'), and 'Group Email*' (empty). Below these fields are two buttons: 'Save' (highlighted with a red box) and 'Cancel'. The entire form is enclosed in a light gray border.

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?

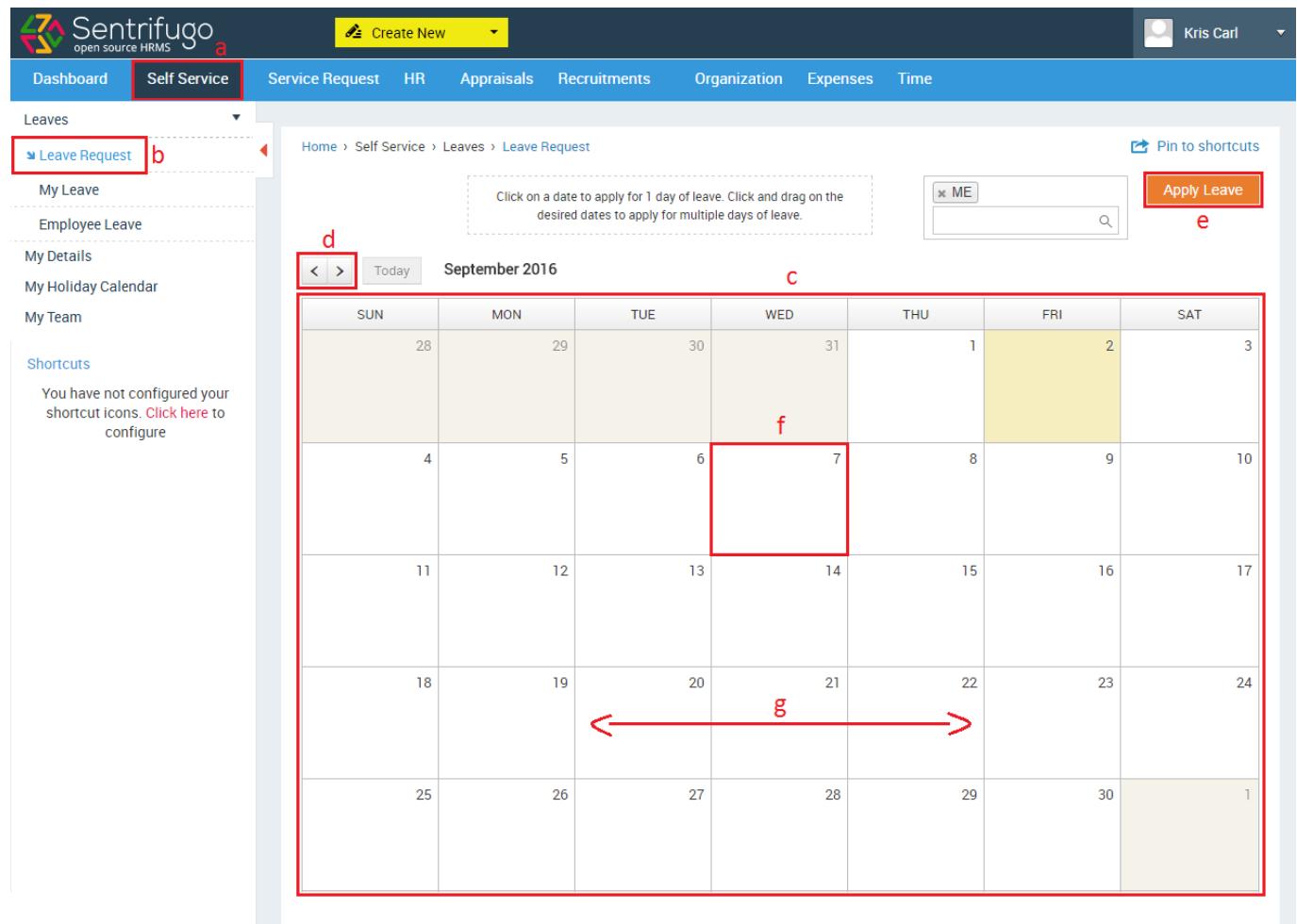
Before raising a leave request, ensure that you have been allotted leaves for the current year. If you have not been allotted leave an information message will be displayed:



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

To raise a leave request:

Please refer Figure 45



The screenshot shows the Sentrifugo Self Service Leaves module. The top navigation bar includes 'Create New' (with a dropdown arrow), a user profile for 'Kris Carl', and menu items: Dashboard, Self Service (highlighted with a red box), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time.

The left sidebar contains links: Leaves (selected), Leave Request (highlighted with a red box), My Leave, Employee Leave, My Details, My Holiday Calendar, and My Team. It also has a 'Shortcuts' section with a note: "You have not configured your shortcut icons. Click here to configure".

The main content area shows the URL: Home > Self Service > Leaves > Leave Request. It includes a search bar with placeholder 'ME' and a 'Pin to shortcuts' button. A callout box 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."

The calendar for September 2016 is displayed, showing days from 28 of August to 31 of August, and 1 to 30 of September. A specific week (September 6-10) is highlighted with a red box. A red arrow labeled 'g' points between September 19 and 20. A red box labeled 'f' is placed over the cell for September 7. A red box labeled 'd' is placed over the date navigation arrows. A red box labeled 'b' is placed over the 'Leave Request' button. A red box labeled 'e' is placed over the 'Apply Leave' button.

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

Figure 45

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

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

Please refer Figure 46

Create: Leave request

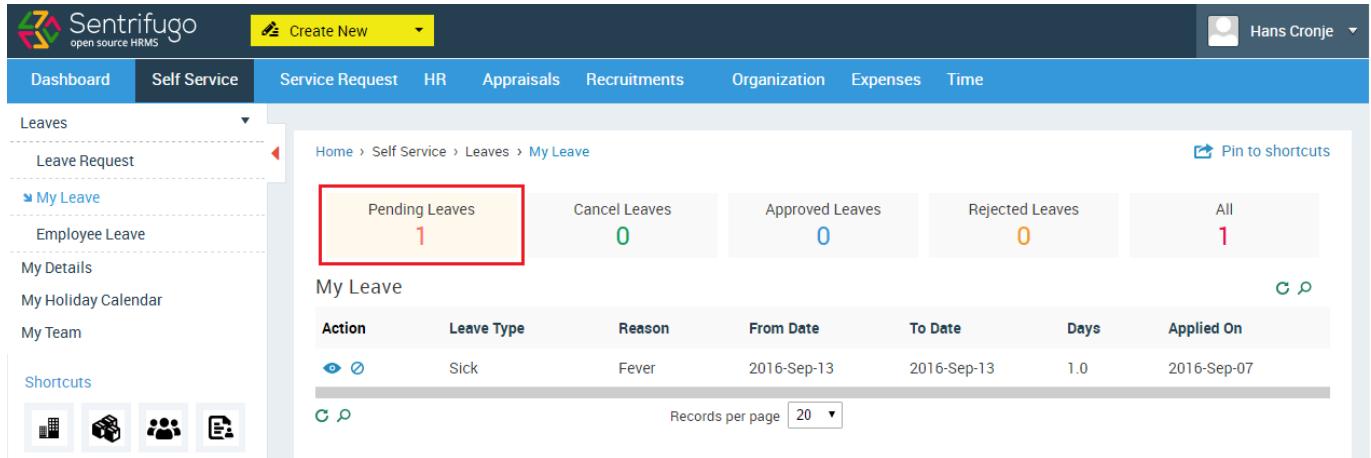
Available Leaves *	Leave Type *	Reason *
20	Select Leave Type	30 characters remaining (30 maximum)
From ? *	To ? *	Leave For *
2016-Sep-14	2016-Sep-14	Full Day
Days	Reporting Manager *	
1	Jim Jim	
<input style="background-color: #0070C0; color: white; border: 1px solid #0070C0; padding: 5px; margin-right: 10px;" type="button" value="Apply"/> <input style="border: 1px solid #ccc; padding: 5px;" type="button" value="Cancel"/>		

Figure 46

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

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

Please refer Figure 47



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

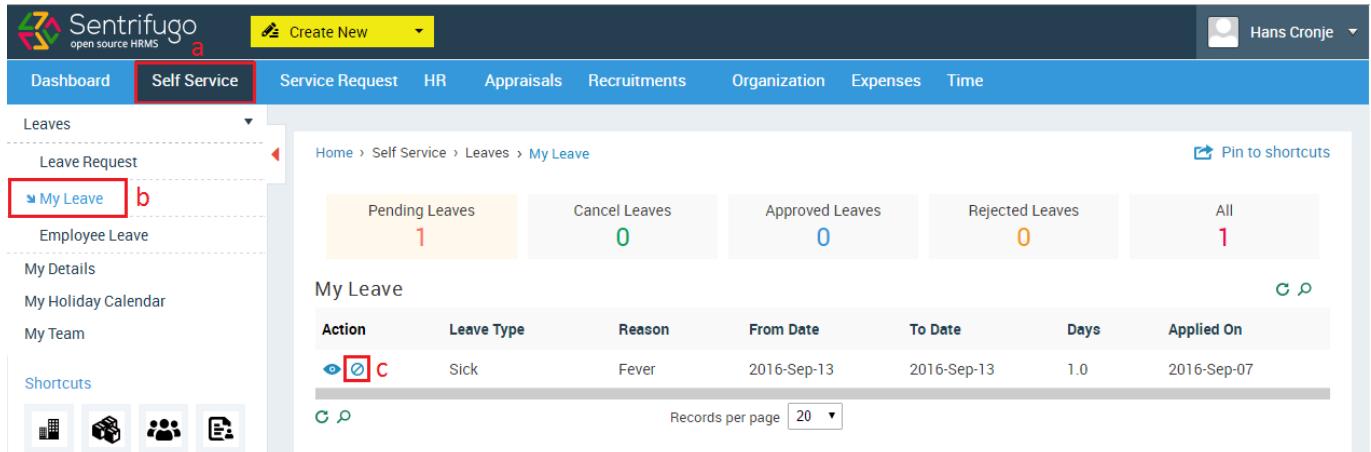
Figure 47

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



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

Figure 48

- Click **Self Service** in the top menu bar
- Click **My Leave** in the submenu
- Click **Cancel** icon in the Action column

A confirmation message will be displayed

Please refer Figure 49

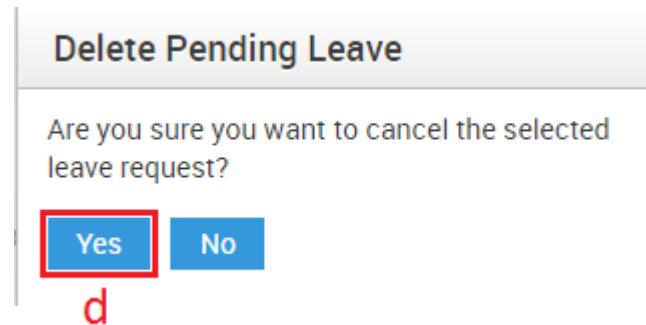


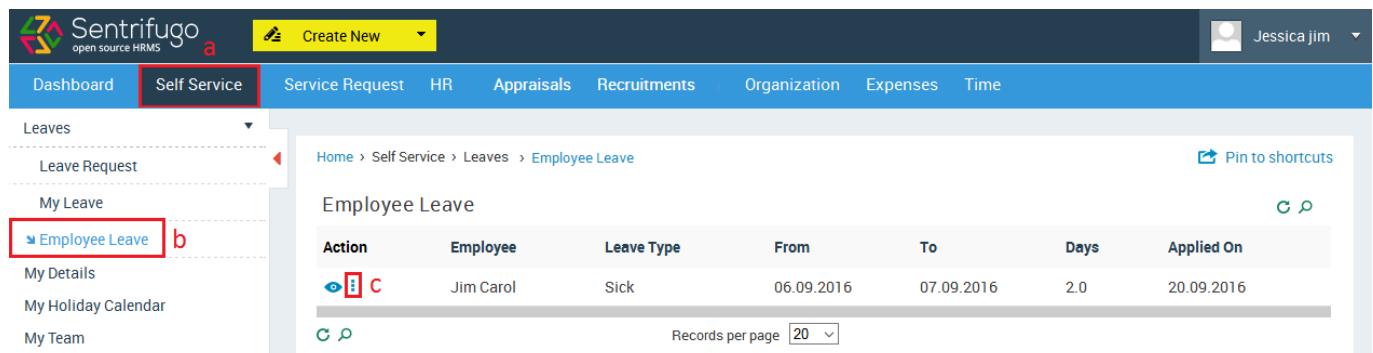
Figure 49

- Click Yes button to cancel the leave

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

Manager

Please refer Figure 50



The screenshot shows the Sentrifugo Manager interface. The top navigation bar includes 'Create New' and a user profile for 'Jessica jim'. The main menu has tabs like Dashboard, Self Service (highlighted with a red box), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. On the left, a sidebar has 'Leaves' expanded, with 'Leave Request' and 'My Leave' sections. Under 'My Leave', 'Employee Leave' is selected (highlighted with a red box). A red letter 'b' is placed next to 'Employee Leave'. Below the sidebar is a breadcrumb trail: Home > Self Service > Leaves > Employee Leave. The main content area is titled 'Employee Leave' and shows a table with one row:

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

Red letters 'c' and 'd' are placed near the 'More Action' icon and the 'Yes' button respectively in the confirmation dialog from Figure 49.

Figure 50

- Click **Self Service** in the top menu bar
- Click **Employee Leave** on the left side panel
- Click **More Action** button in the Action column

A small pop up window will open.

Please refer Figure 51

Leaverequest

Status
d
Comments

50 characters remaining (50 maximum)

SAVE e

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	

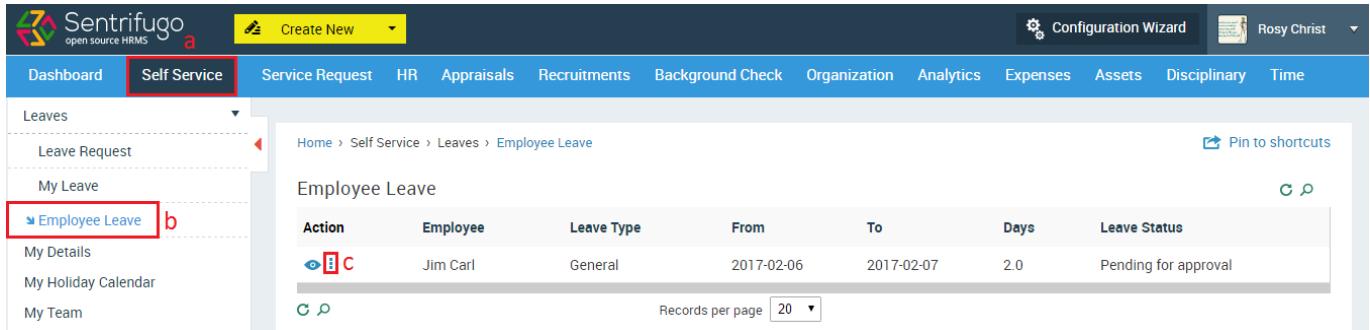
Figure 51

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

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

The HR and Employees' reporting managers will have the privilege to approve/reject leave requests.

Please refer Figure 52



The screenshot shows the Sentrifugo web application. At the top, there is a navigation bar with links for Dashboard, Self Service (which is highlighted in red), Create New, Configuration Wizard, and a user profile for Rosy Christ. Below the navigation bar is a secondary menu with categories like Leaves, Leave Request, My Leave, and Employee Leave (also highlighted in red). Under Employee Leave, there are sub-links for My Details, My Holiday Calendar, and My Team. The main content area displays a table titled "Employee Leave" with columns for Action, Employee, Leave Type, From, To, Days, and Leave Status. One row is visible, showing Jim Carl, General leave type, from 2017-02-06 to 2017-02-07, 2.0 days, and a status of "Pending for approval". There are also buttons for More Actions (with a red letter 'c') and a search function. A sidebar on the left contains a "Pin to shortcuts" link.

Figure 52

- a. Click **Self Service** in the top menu
- b. Click **Employee Leave** in the submenu
- c. Click **More Actions** button in the Action column

A small pop up window will open.

Please refer Figure 53

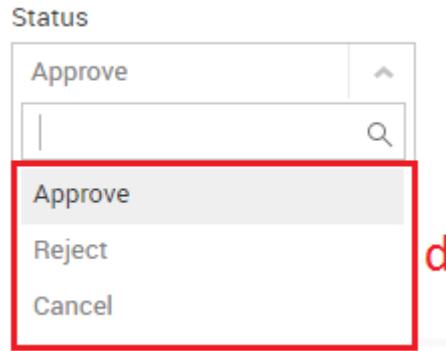


Figure 53

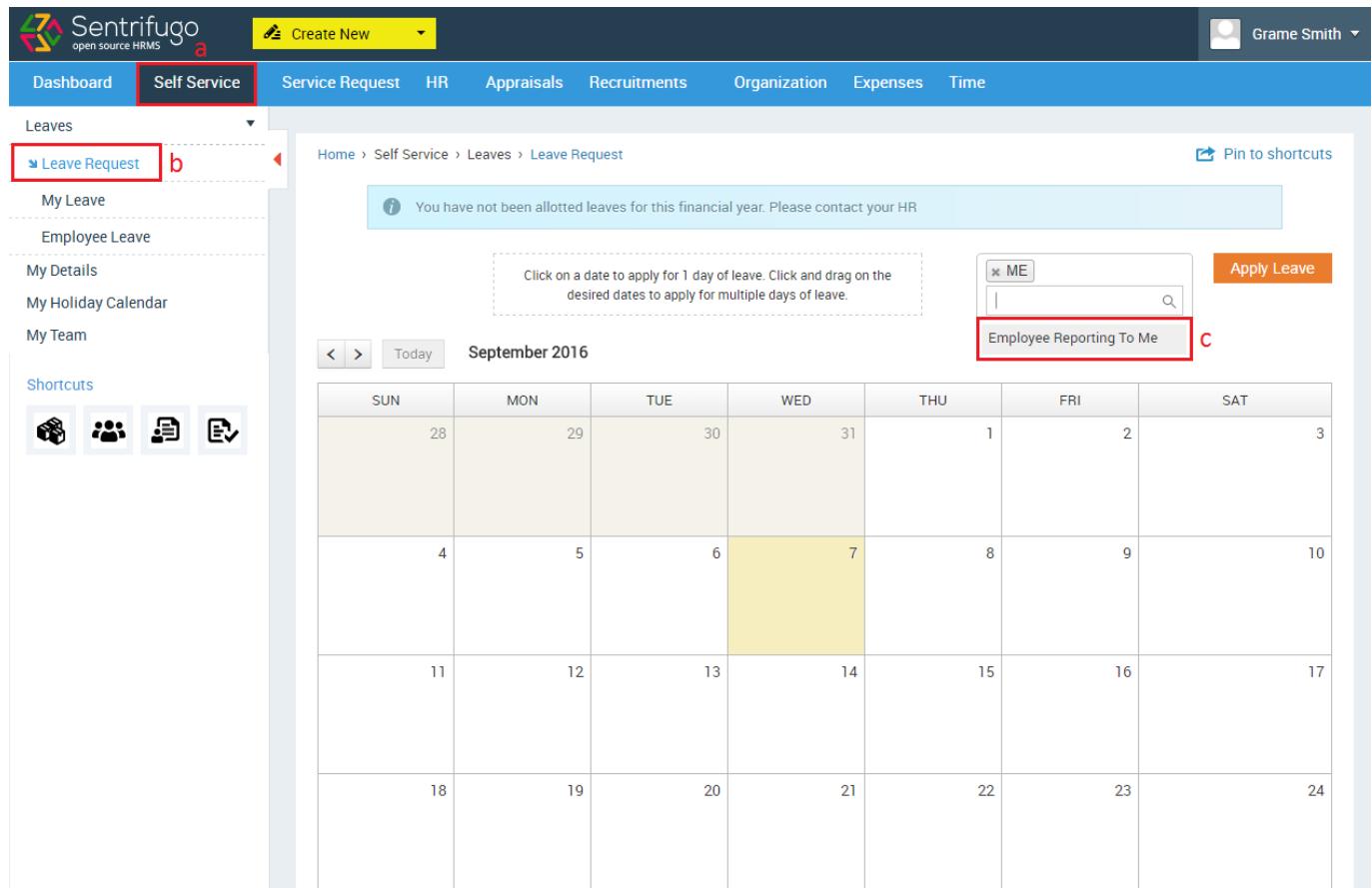
- d. Select the status

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 HRMS interface. At the top, there's a navigation bar with the Sentrifugo logo, a 'Create New' button, and a user profile for 'Grame Smith'. Below the logo, there are tabs for Dashboard, Self Service (which is highlighted with a red box), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. On the left, a sidebar under 'Leaves' has a 'Leave Request' option (also highlighted with a red box) and other links like My Leave, Employee Leave, My Details, My Holiday Calendar, and My Team. Below the sidebar is a 'Shortcuts' section with icons. The main content area shows a breadcrumb path: Home > Self Service > Leaves > Leave Request. A message box says, 'You have not been allotted leaves for this financial year. Please contact your HR'. Below it, a text box 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.' To the right is a search field with 'ME' and a magnifying glass icon, labeled 'Employee Reporting To Me' (also highlighted with a red box). An 'Apply Leave' button is next to it. The main feature is a calendar for September 2016. The days are labeled from 28 to 30 of August, then 4 to 10 of September, followed by 11 to 17, and ending with 18 to 24. The date '6' is highlighted with a yellow background, indicating it's selected or being used for leave application.

Figure 54

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

- c. 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

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



Leaverequest

Status

Comments

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

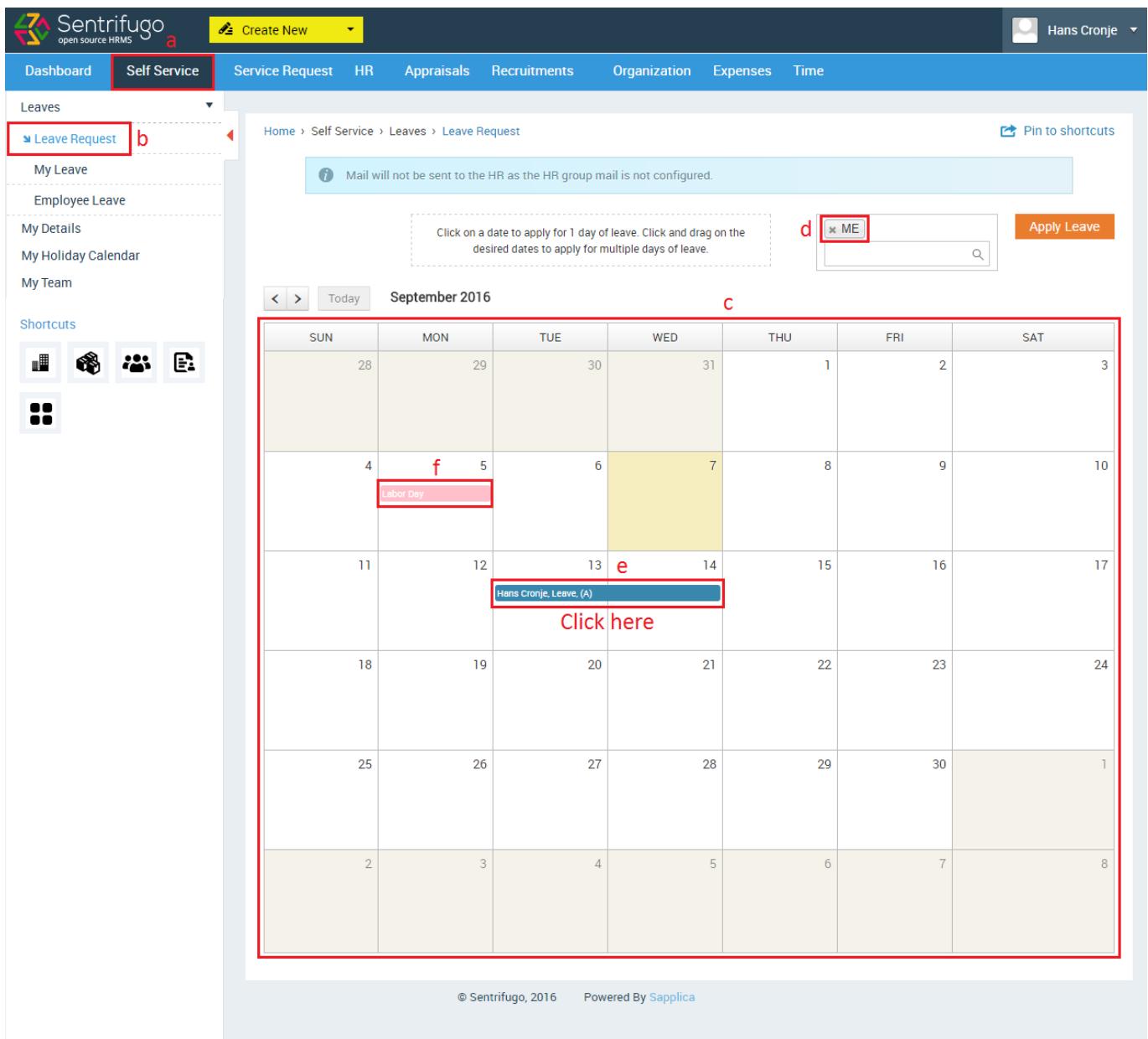


Figure 56

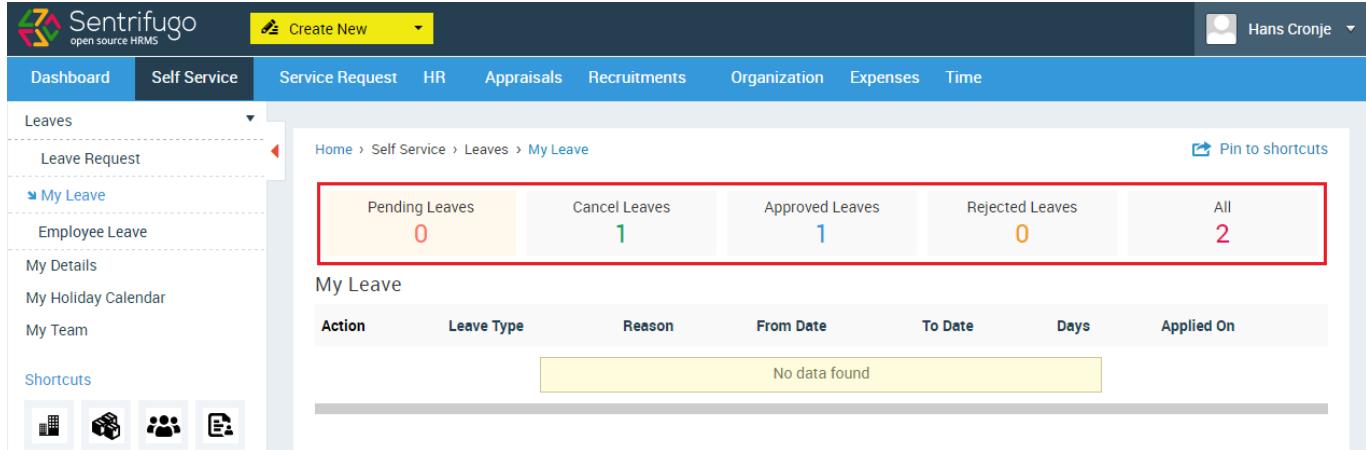
- Click **Self Service** in the top menu
- Click **Leave Request** in the submenu
- A calendar plugin will be displayed.
- Select the option 'Me' (It will be selected by default)
- For the day(s) on which you have taken leave(s)/raised leave request(s), a horizontal bar will be displayed across those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

Your leaves requests will be categorized in to 5 types:

- Pending Leaves
- Canceled Leaves
- Approved Leaves

- Rejected Leaves
- All

Please refer Figure 57

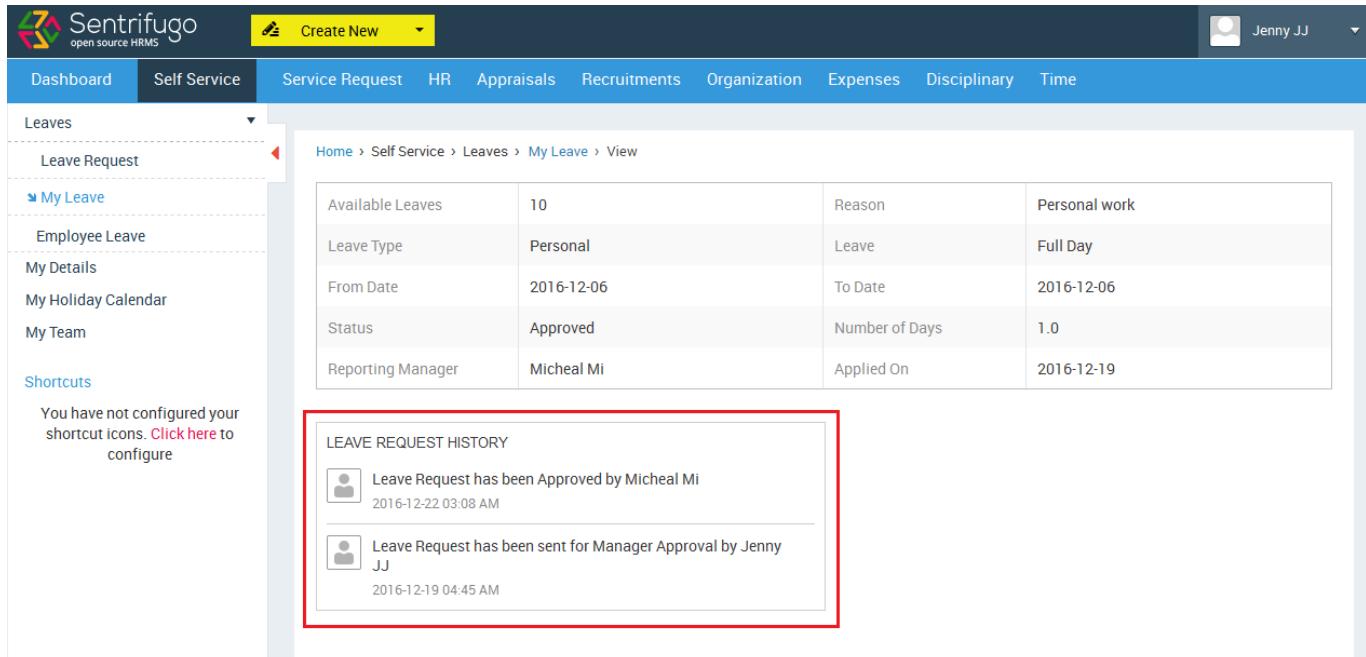


Pending Leaves	Cancel Leaves	Approved Leaves	Rejected Leaves	All
0	1	1	0	2

Figure 57

Click on any category to view the leaves accordingly.

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.

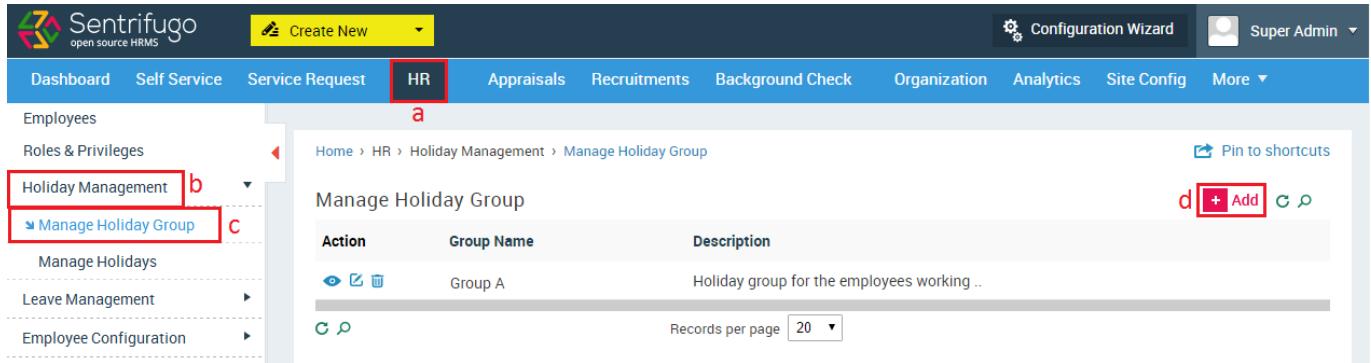


Available Leaves	10	Reason	Personal work
Leave Type	Personal	Leave	Full Day
From Date	2016-12-06	To Date	2016-12-06
Status	Approved	Number of Days	1.0
Reporting Manager	Micheal Mi	Applied On	2016-12-19

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

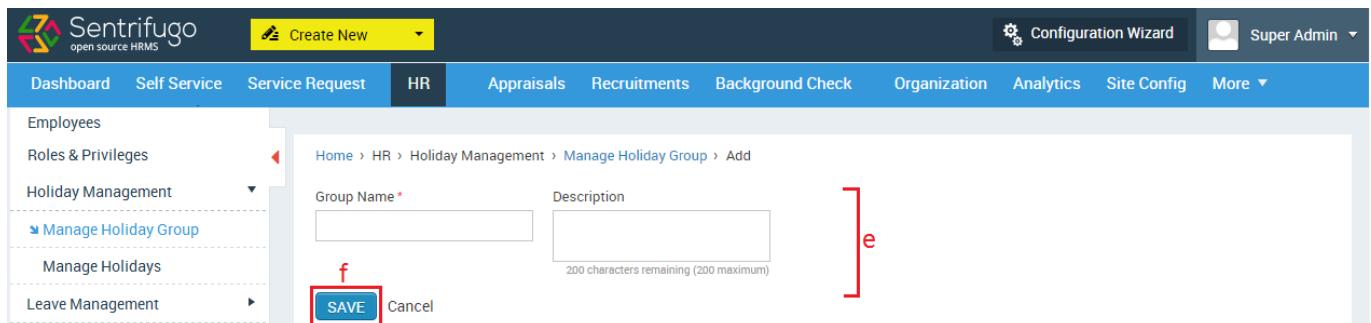


The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. The main menu has 'HR' selected. The left sidebar has 'Holiday Management' selected, with 'Manage Holiday Group' highlighted. The main content area is titled 'Manage Holiday Group' and shows a table with one row: 'Group A' with the description 'Holiday group for the employees working ...'. There are buttons for '+Add' and a search icon.

Figure 58

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

Please refer Figure 59



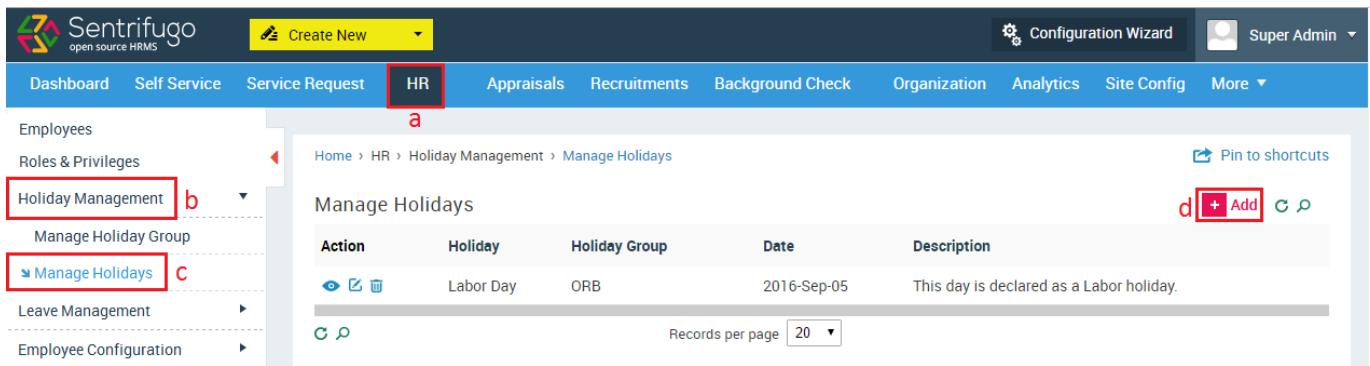
The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. The main menu has 'HR' selected. The left sidebar has 'Manage Holiday Group' selected. The main content area is titled 'Add' and shows a form with 'Group Name' and 'Description' fields, and a 'SAVE' button.

Figure 59

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

3.12 How do I create Holidays?

Please refer Figure 60

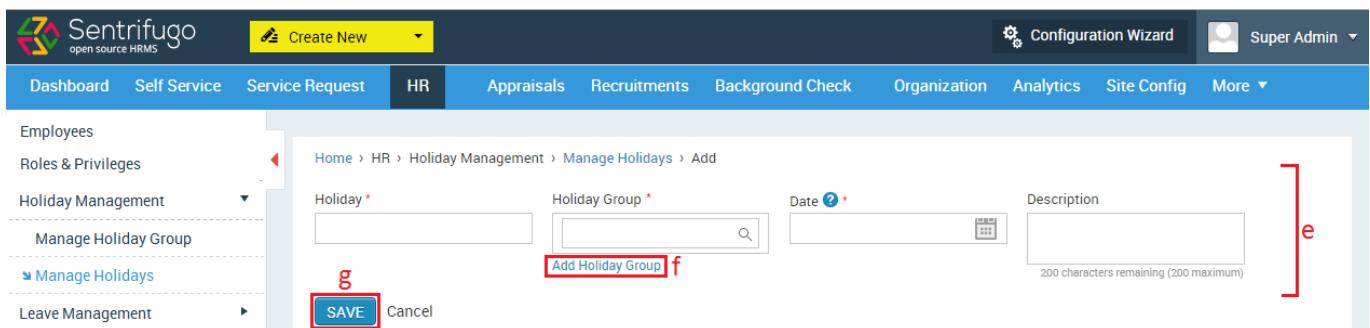


The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar menu lists Employees, Roles & Privileges, Holiday Management (highlighted with a red box), Manage Holiday Group, Manage Holidays (highlighted with a red box), Leave Management, and Employee Configuration. The main content area displays the 'Manage Holidays' page with a table showing a single record: Labor Day under ORB group on 2016-Sep-05, with a description stating it's a Labor holiday. A red box highlights the '+Add' button in the top right corner of the table header.

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 managing holidays. The left sidebar is identical to Figure 60. The main form has fields for 'Holiday' (with a red box around the input field), 'Holiday Group' (with a red box around the input field and a link 'Add Holiday Group' highlighted with a red box), 'Date' (with a red box around the input field), and 'Description' (with a red box around the input field and a note '200 characters remaining (200 maximum)'). At the bottom are 'SAVE' and 'Cancel' buttons, with 'SAVE' highlighted with a red box. A red bracket labeled 'e' points to the 'Description' field.

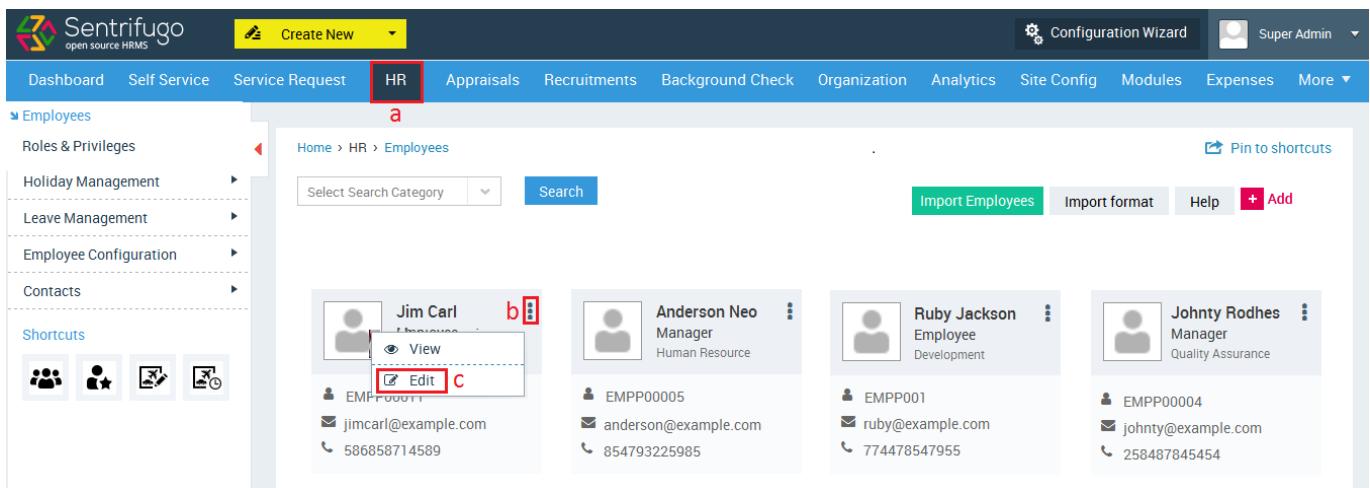
Figure 61

- 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

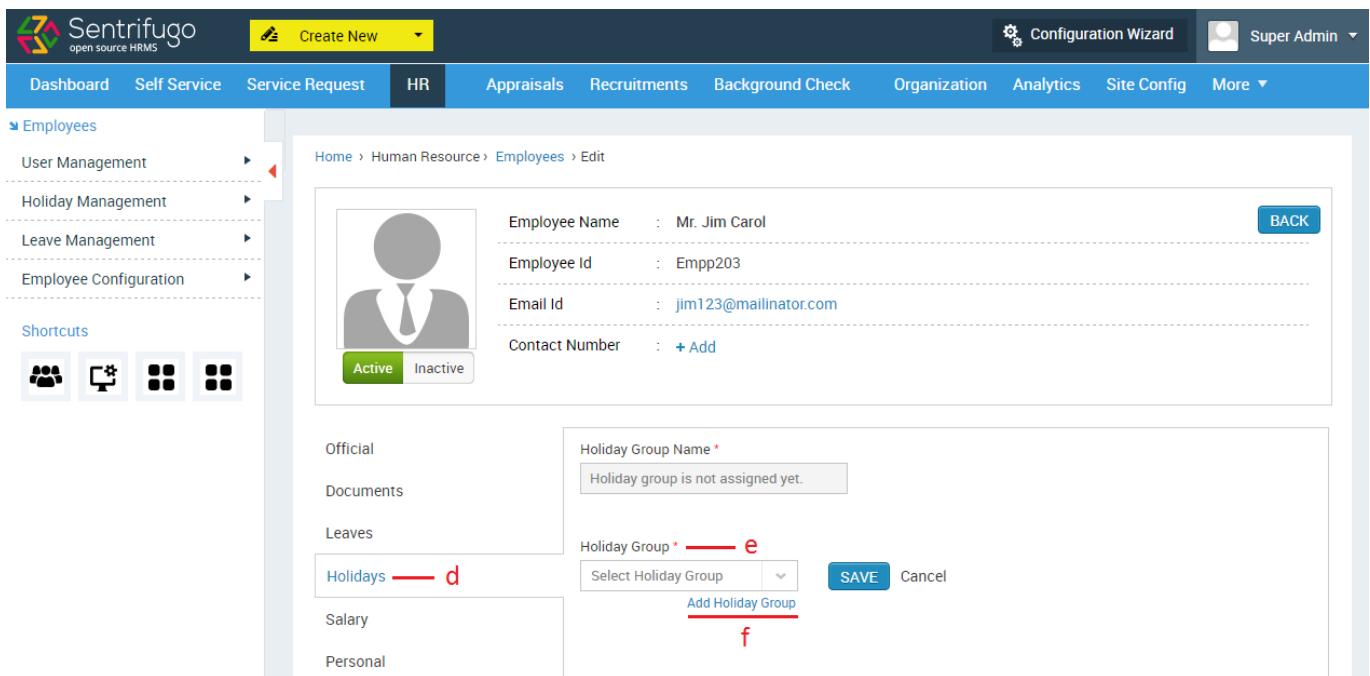


The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes links for Create New, Configuration Wizard, Super Admin, Dashboard, Self Service, Service Request, HR (highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. The left sidebar has sections for Employees, Roles & Privileges, Holiday Management, Leave Management, Employee Configuration, and Contacts, along with a Shortcuts section containing icons for users, roles, leave management, and employee configuration. The main content area displays a list of employees under the 'Employees' category. Each employee entry includes a profile picture, name, title, department, email, phone number, and a 'More Actions' button. The first employee listed is Jim Carl, whose 'Edit' icon is highlighted with a red box. A context menu for Jim Carl is open, with the 'Edit' button also highlighted with a red box.

Figure 62

- Click **HR** in the top menu
- Click **More Actions** button in the Action column
- Click **Edit** icon

Please refer Figure 63

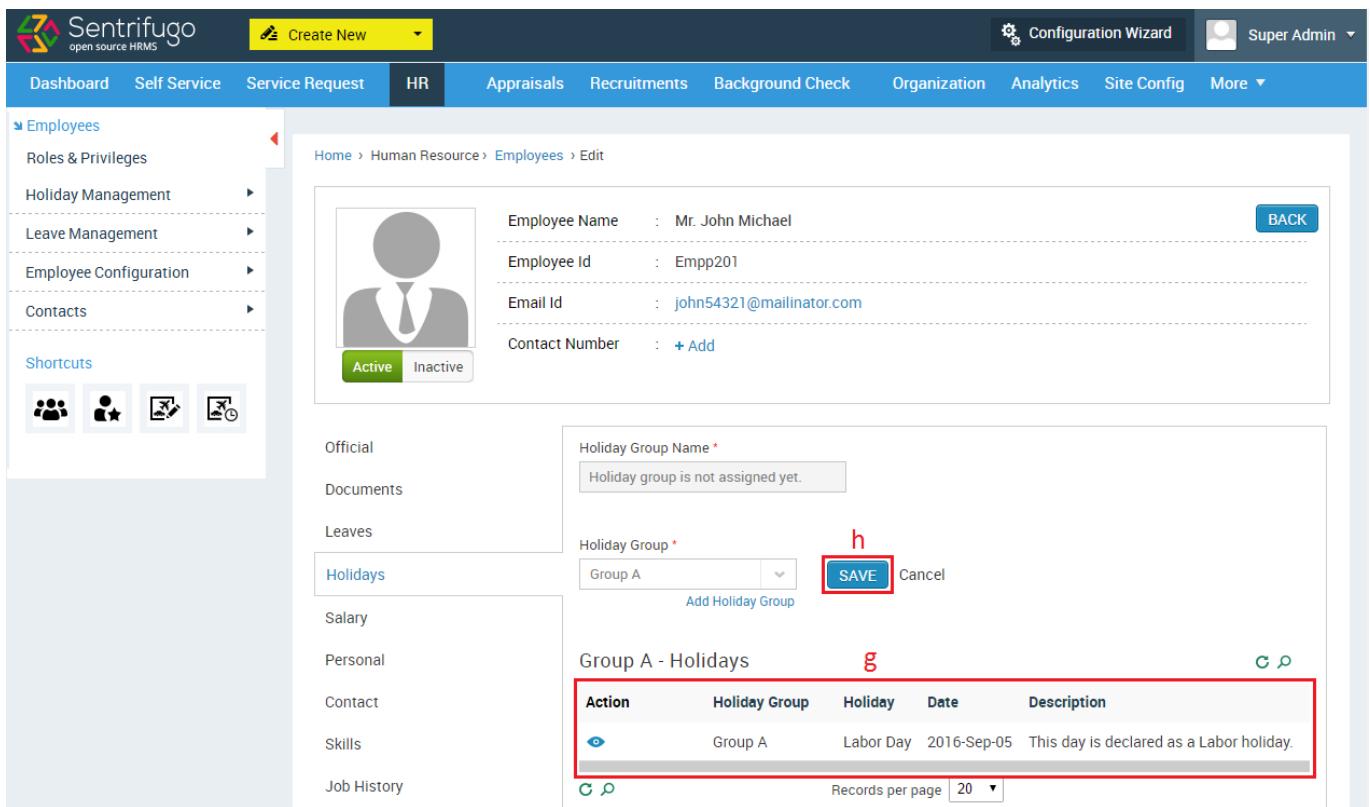


The screenshot shows the Sentrifugo HR module interface, specifically the Employee Edit screen for Jim Carol. The top navigation bar is identical to Figure 62. The left sidebar shows the 'Employees' section with 'User Management' expanded. The main content area shows the 'Edit' screen for Jim Carol, displaying his details: Employee Name (Mr. Jim Carol), Employee Id (Empp203), Email Id (jim123@mailinator.com), and Contact Number (+ Add). Below this, there are tabs for Official, Documents, Leaves, Holidays (highlighted with a red box), Salary, and Personal. In the 'Leaves' tab, there is a 'Holiday Group' field which is empty and highlighted with a red box. A dropdown menu for 'Select Holiday Group' is open. At the bottom right, there are 'SAVE' and 'Cancel' buttons, with the 'Add Holiday Group' button also highlighted with a red box.

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, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, More, Configuration Wizard, and Super Admin.

The left sidebar under the Employees section lists Roles & Privileges, Holiday Management, Leave Management, Employee Configuration, and Contacts. Shortcuts include icons for users, roles, documents, and leave.

The main content area displays employee details for Mr. John Michael (Employee Id: Empp201, Email Id: john54321@mailinator.com). The 'Holidays' tab is selected in the sidebar. A sub-grid titled 'Group A - Holidays' shows one record:

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

Buttons at the bottom of the grid include 'C' (Create), 'R' (Read), 'G' (Grid), 'P' (Print), and 'Delete'. A 'Records per page' dropdown is 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

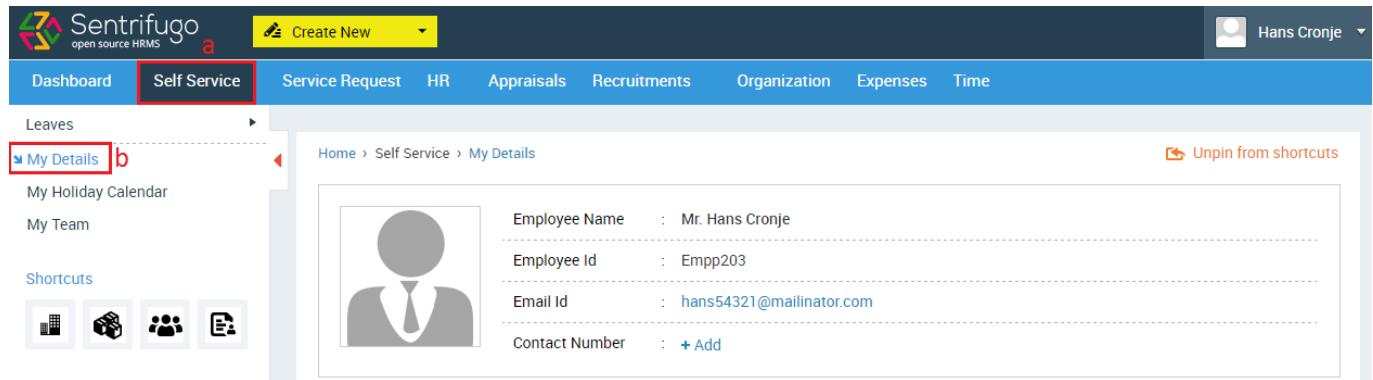
Self-Service enables you to raise and handle leave requests. You can access your personal information, documents and leave details. You can also check the details of the employees working in your team. A Manager has the privilege to add Employees to Sentrifugo, provided he is their reporting manager.

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



The screenshot shows the Sentrifugo web application interface. At the top, there is a dark header bar with the Sentrifugo logo, a 'Create New' button, and a user profile for 'Hans Cronje'. Below the header is a blue navigation bar with tabs: Dashboard, Self Service (which is highlighted with a red box), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. On the left side, there is a sidebar with a 'Leaves' section containing 'My Holiday Calendar' and 'My Team', and a 'Shortcuts' section with four icons. The main content area shows a breadcrumb path 'Home > Self Service > My Details'. It features a large placeholder image of a person, followed by a table of employee details:

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

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

Figure 65

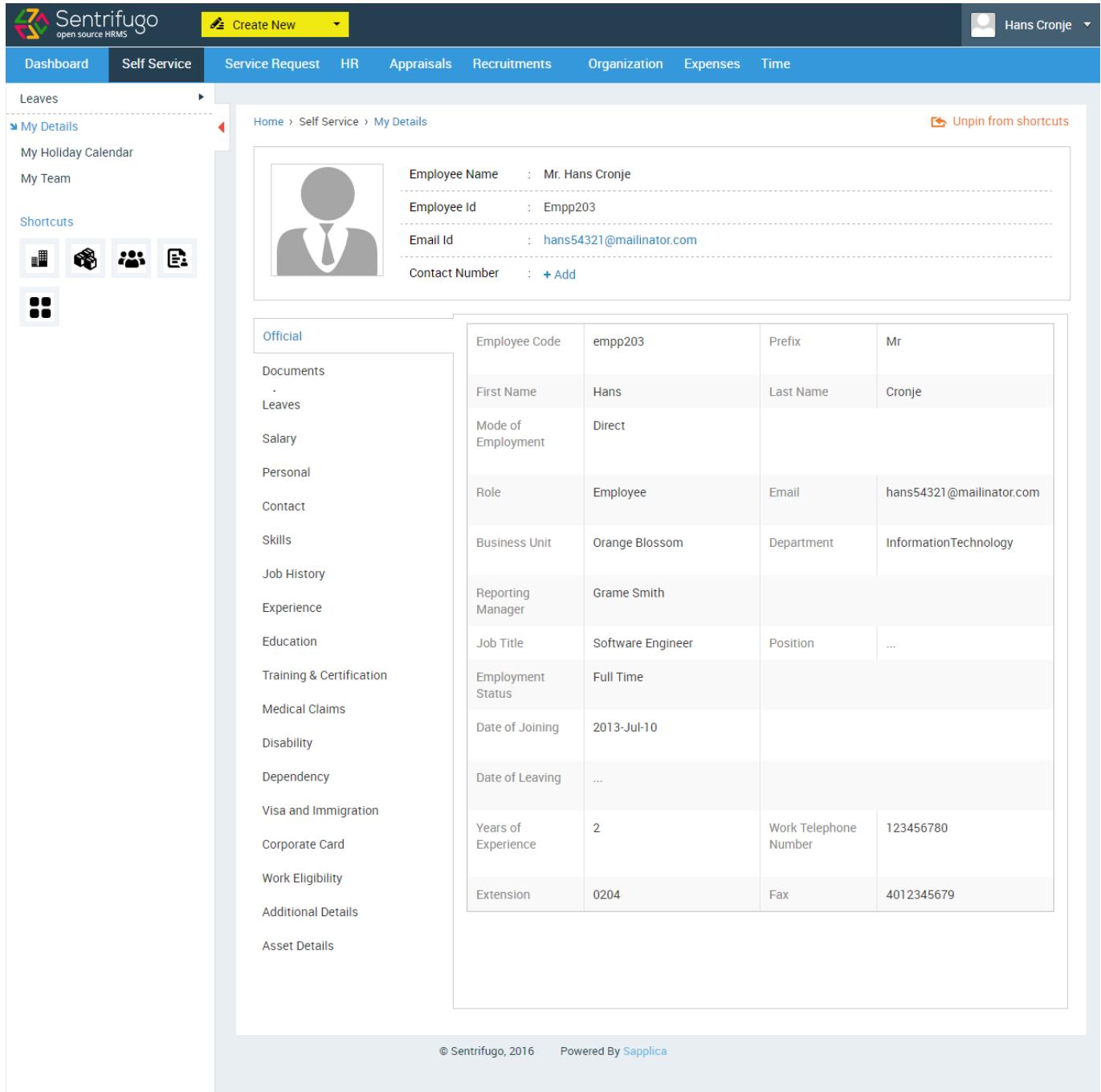
- Click **Self Service** in the top menu
- Click **My Details** on the left menu panel



Only the Super Admin/Management/HR has the privilege to add/edit/delete all employees' details.

Official

Please refer Figure 66



The screenshot shows the Sentrifugo HRMS application interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, 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 'My Details' section under 'Self Service'. It includes a profile picture placeholder and a summary of employee information:

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

Below this, a table titled 'Official' lists various personal and professional details:

	Employee Code	Prefix	
First Name	empp203	Mr	
Mode of Employment	Direct		
Role	Employee	Email	hans54321@mailinator.com
Business Unit	Orange Blossom	Department	InformationTechnology
Reporting Manager	Grame Smith		
Job Title	Software Engineer	Position	...
Employment Status	Full Time		
Date of Joining	2013-Jul-10		
Date of Leaving	...		
Years of Experience	2	Work Telephone Number	123456780
Extension	0204	Fax	4012345679

On the left side, a sidebar titled 'My Details' 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.

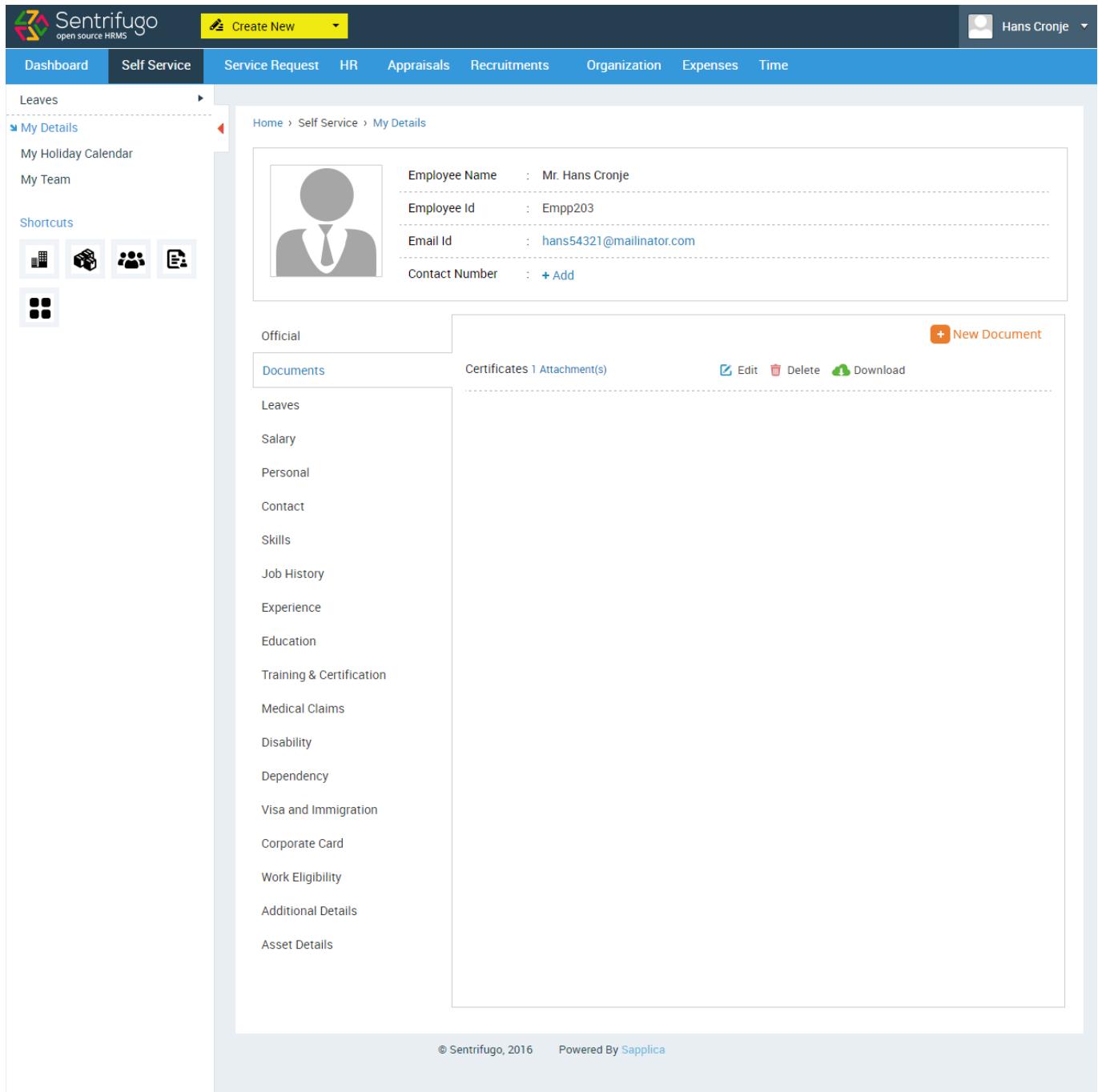
At the bottom of the page, there are copyright and power information: © Sentrifugo, 2016 and Powered By [Sapplica](#).

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

The main content area is titled 'My Details'. It displays basic employee information: Employee Name (Mr. Hans Cronje), Employee Id (Empp203), Email Id (hans54321@mailinator.com), and Contact Number (+ Add). Below this, there is a section for 'Official' documents, which includes a 'Documents' tab and a 'Certificates' tab showing 1 Attachment(s). The 'Certificates' tab has options for Edit, Delete, and Download.

A sidebar on the left lists various document categories: Leaves, Salary, Personal, Contact, Skills, Job History, Experience, Education, Training & Certification, Medical Claims, Disability, Dependency, Visa and Immigration, Corporate Card, Work Eligibility, Additional Details, and Asset Details.

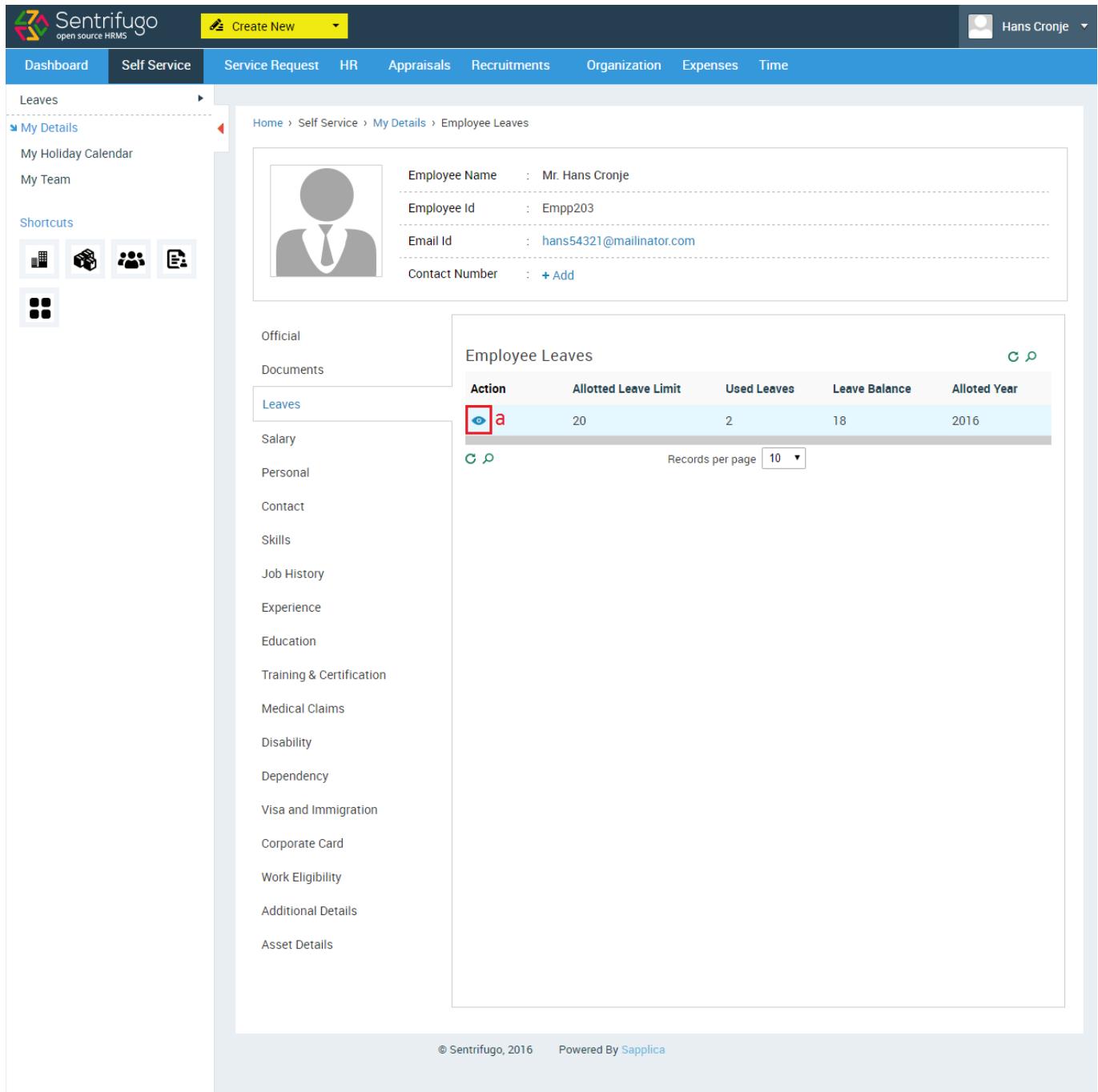
At the bottom of the page, there is a footer with copyright information: © Sentrifugo, 2016 and Powered By [Sapplica](#).

Figure 67

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

Leaves

Please refer Figure 68



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

The left sidebar under 'My Details' lists 'My Holiday Calendar' and 'My Team'. Under 'Shortcuts', there are icons for Home, Self Service, My Details, and Employee Leaves. Below these are more detailed sections: 'Official' (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, Asset Details).

The central content area displays 'Employee Leaves' information for Mr. Hans Cronje (Employee ID: EmpP203, Email: hans54321@mailinator.com). It shows his leave details: Allotted Leave Limit (20), Used Leaves (2), Leave Balance (18), and Allotted Year (2016). A red box highlights the 'Action' column header. Below this, there are 'Globe' and 'Search' icons, and a dropdown for 'Records per page' set to 10.

At the bottom, a footer notes: © Sentrifugo, 2016 | Powered By [Sapplica](#).

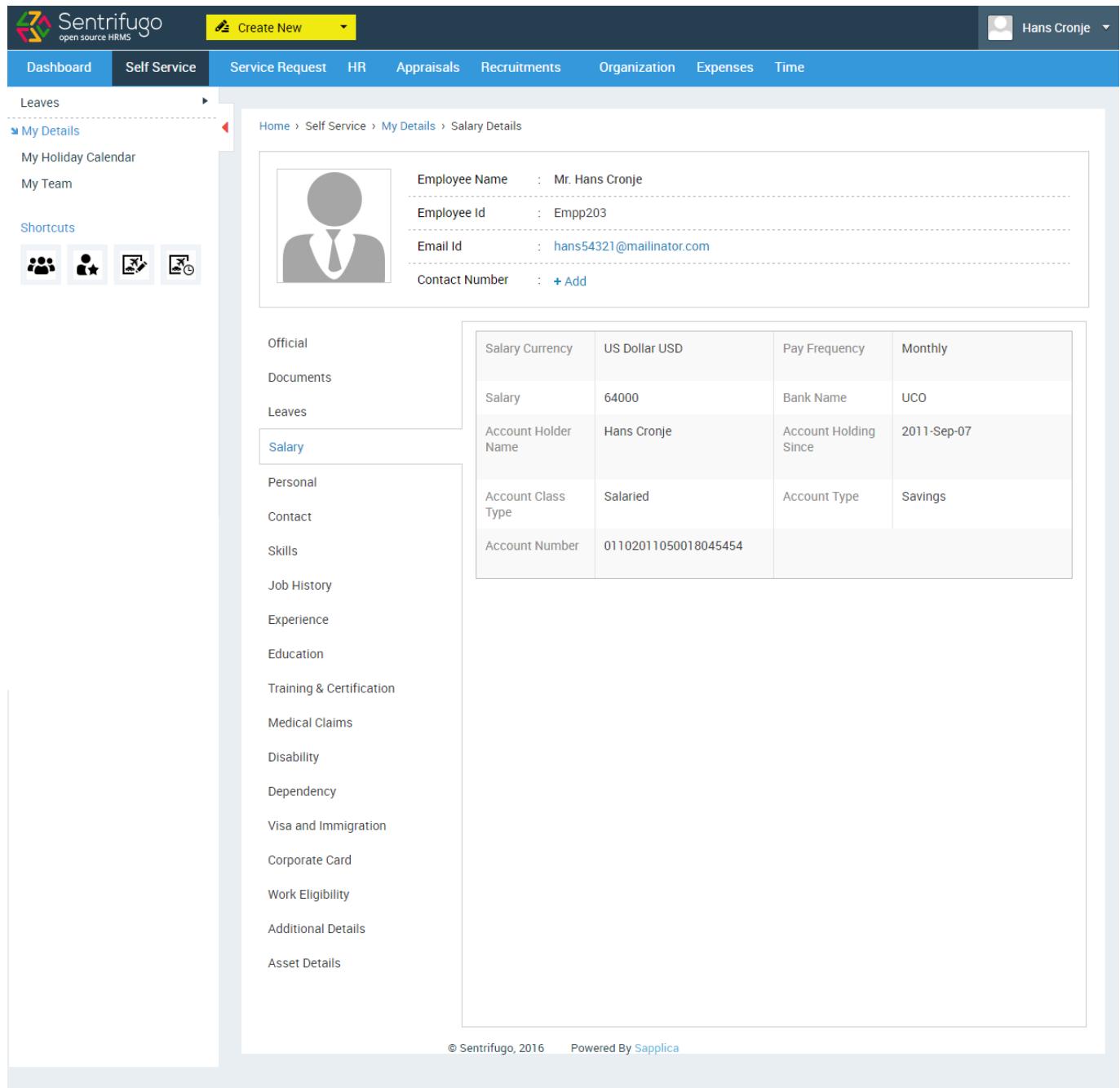
Figure 68

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

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

Salary

Please refer Figure 69



The screenshot shows the Sentrifugo open source HRMS 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 'Create New' button and a user profile for 'Hans Cronje' are also visible.

The main content area displays the 'Salary Details' page for 'Hans Cronje'. On the left, a sidebar lists various categories: Leaves, My Details (selected), My Holiday Calendar, My Team, Shortcuts, Official, Documents, Leaves, Salary (selected), Personal, Contact, Skills, Job History, Experience, Education, Training & Certification, Medical Claims, Disability, Dependency, Visa and Immigration, Corporate Card, Work Eligibility, Additional Details, and Asset Details. Below the sidebar, there is a large image placeholder for the employee's profile picture.

The right side of the screen shows a table with salary information:

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		

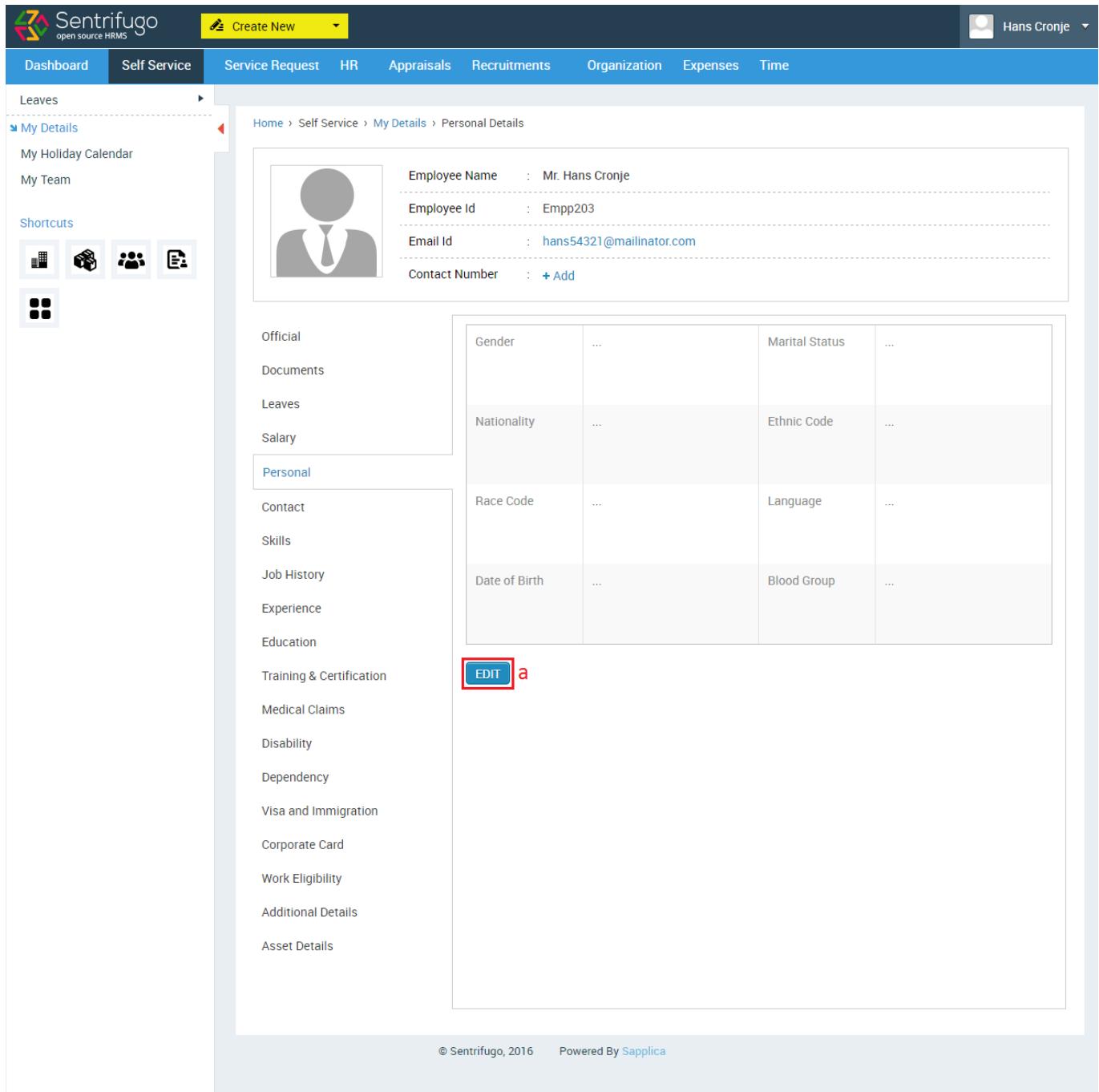
At the bottom of the page, there are copyright and power information: © Sentrifugo, 2016 and Powered By Sapplica.

Figure 69

You can view your salary and account details.

Personal

Please refer Figure 70



The screenshot shows the Sentrifugo open source HRMS application interface. At the top, there is a navigation bar with links for Dashboard, Self Service, 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 'Personal Details' for an employee named 'Mr. Hans Cronje'. The employee's ID is 'Empp203', email is 'hans54321@mailinator.com', and contact number is listed as '+ Add'.

On the left, a sidebar lists various categories: Leaves, My Details (selected), My Holiday Calendar, My Team, Shortcuts (with icons for Home, Work, Team, and Profile), and a grid icon.

The 'Personal' section of the sidebar is expanded, showing options like Contact, Skills, Job History, Experience, Education, Training & Certification, Medical Claims, Disability, Dependency, Visa and Immigration, Corporate Card, Work Eligibility, Additional Details, and Asset Details.

The main panel contains a table with columns for Gender, Nationality, Race Code, Date of Birth, Marital Status, Ethnic Code, Language, and Blood Group. An 'EDIT' button is highlighted with a red box and labeled 'a'.

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

Figure 70

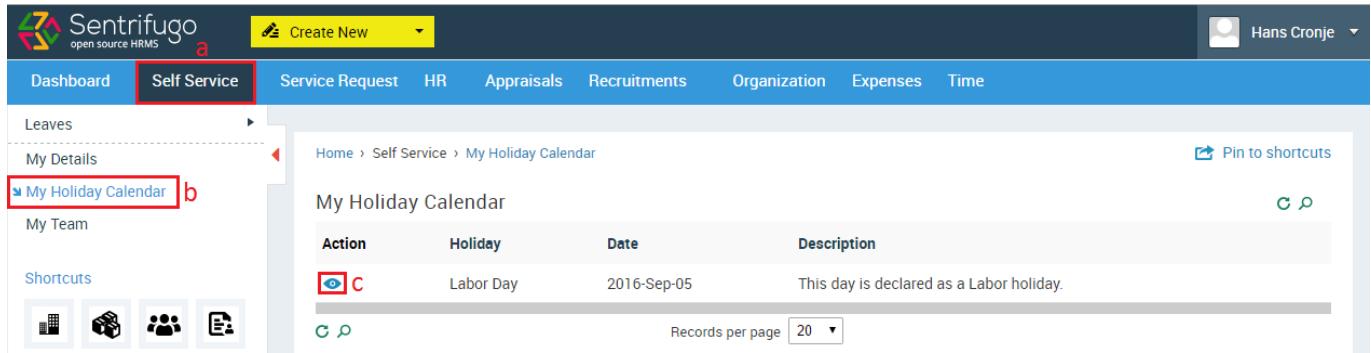
- Click **Edit icon** to add or modify any details

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'. Below the logo, there is a horizontal menu with tabs: 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 includes 'Leaves', 'My Details', 'My Holiday Calendar' (which is highlighted with a red box), 'My Team', and 'Shortcuts' (with icons for Home, Search, People, and Help). The main content area shows a breadcrumb path: Home > Self Service > My Holiday Calendar. It displays a table titled 'My Holiday Calendar' with columns: Action, Holiday, Date, and Description. One row is shown: 'C' (View icon) | Labor Day | 2016-Sep-05 | This day is declared as a Labor holiday. There are also 'Pin to shortcuts' and 'Print' buttons at the top right of the content area.

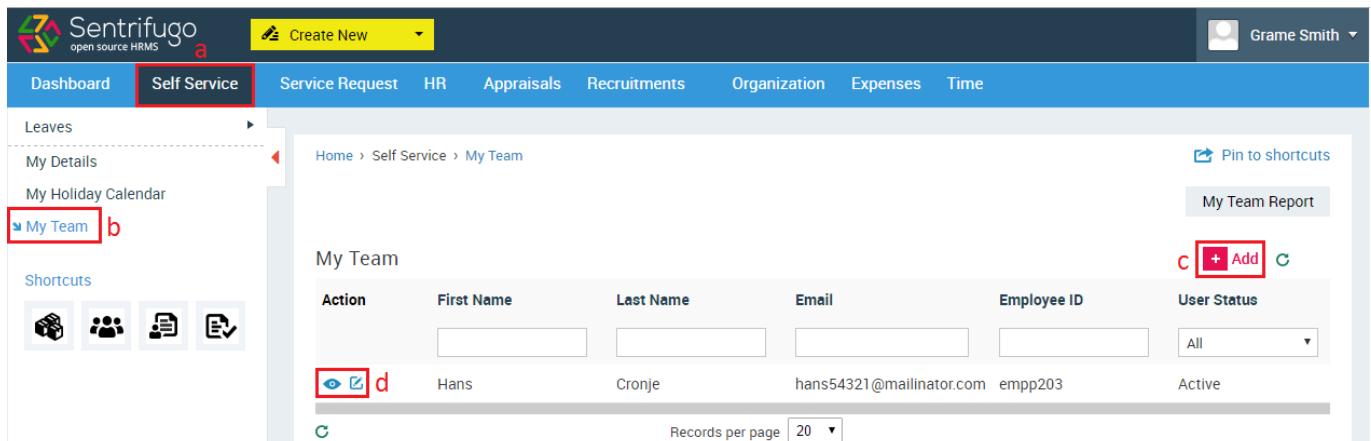
Figure 71

- 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'. Below the logo, there is a horizontal menu with tabs: 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 includes 'Leaves', 'My Details', 'My Holiday Calendar', 'My Team' (which is highlighted with a red box), and 'Shortcuts' (with icons for Home, Search, People, and Help). The main content area shows a breadcrumb path: Home > Self Service > My Team. It displays a table titled 'My Team' with columns: Action, First Name, Last Name, Email, Employee ID, and User Status. One row is shown: 'C' (View icon) | 'D' (Edit icon) | Hans | Cronje | hans54321@mailinator.com | empp203 | Active. There are also 'Pin to shortcuts' and 'Print' buttons at the top right of the content area.

Figure 72

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

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

Or

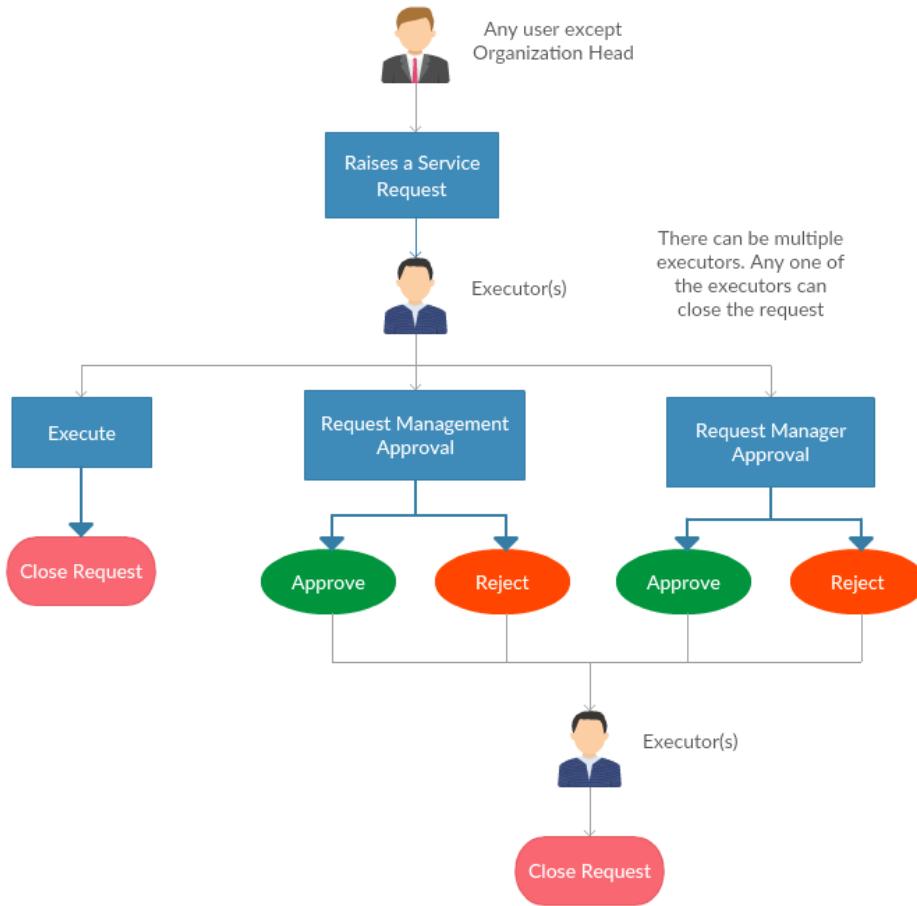
d. Click **View/Edit** icon to view or edit employee details



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

5. Service Request

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

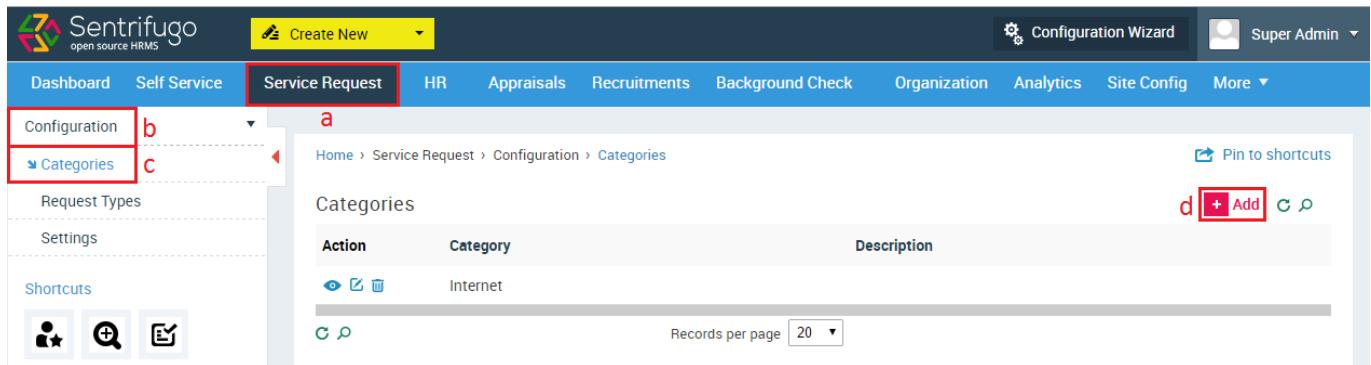


Description:

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

5.1 How do I create Service Request Categories?

Please refer Figure 73

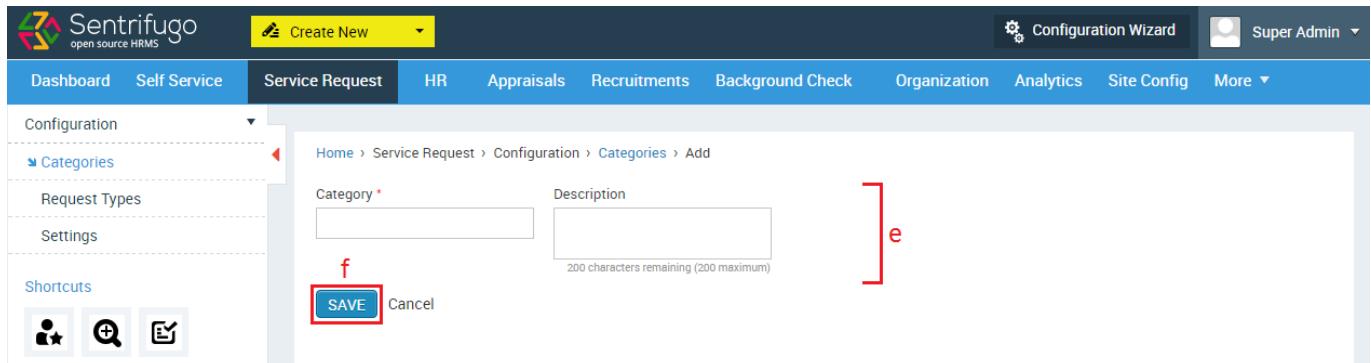


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes the logo, 'Create New' button, 'Configuration Wizard', and 'Super Admin'. The main menu has tabs for Dashboard, Self Service, Service Request (which is highlighted), HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar has 'Configuration' (highlighted) and 'Categories' (highlighted). The main content area shows a table titled 'Categories' with columns for Action, Category, and Description. One row is listed: 'Internet'. There are buttons for Pin to shortcuts, +Add (highlighted), and other actions. A legend at the bottom identifies elements: a (Service Request tab), b (Configuration sidebar), c (Categories submenu), d (+Add button), and e (Pin to shortcuts).

Figure 73

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

Please refer Figure 74



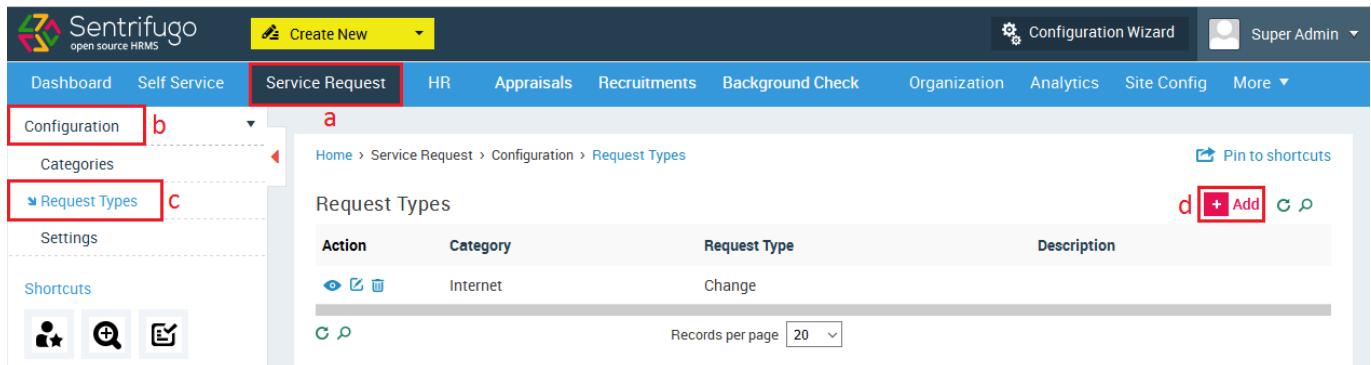
The screenshot shows the 'Add Category' form. The top navigation bar and main menu are identical to Figure 73. The sidebar shows 'Configuration' and 'Categories'. The main content area has a form with 'Category *' and 'Description' fields, both with placeholder text. A note says '200 characters remaining (200 maximum)'. At the bottom are 'SAVE' and 'Cancel' buttons. A red bracket labeled 'e' groups the 'Category' and 'Description' fields, and another red bracket labeled 'f' groups the 'SAVE' and 'Cancel' buttons.

Figure 74

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

5.2 How do I create Service Request Types?

Please refer Figure 75

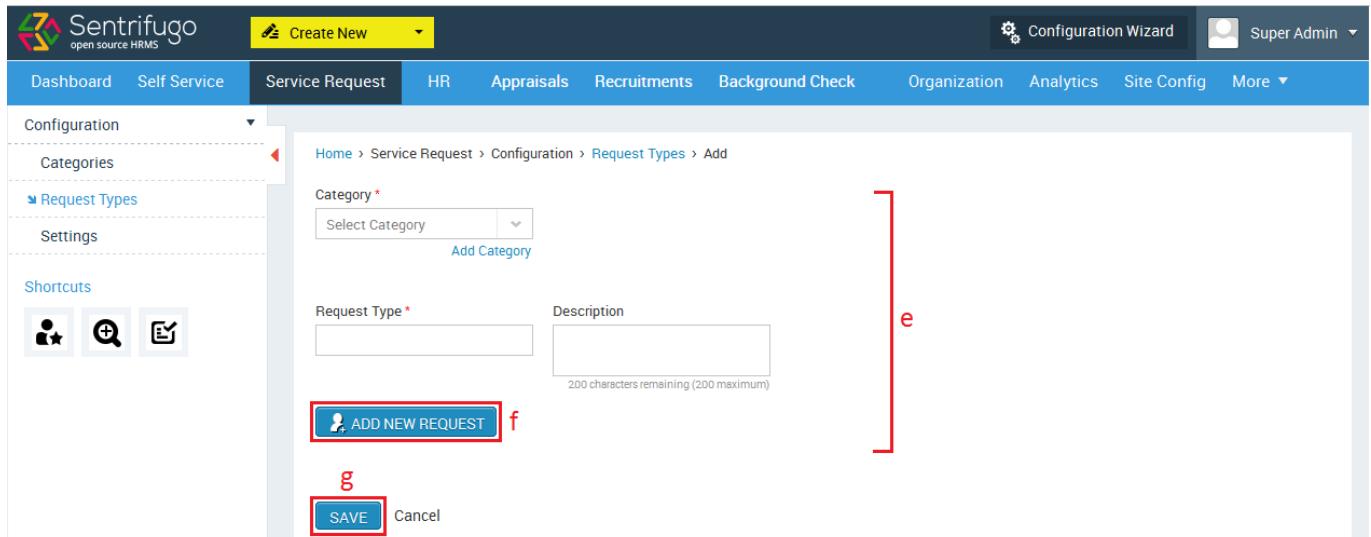


Action	Category	Request Type	Description
	Internet	Change	

Figure 75

- 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



Category * Add Category

Request Type * Description
200 characters remaining (200 maximum)

ADD NEW REQUEST f

g SAVE Cancel

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

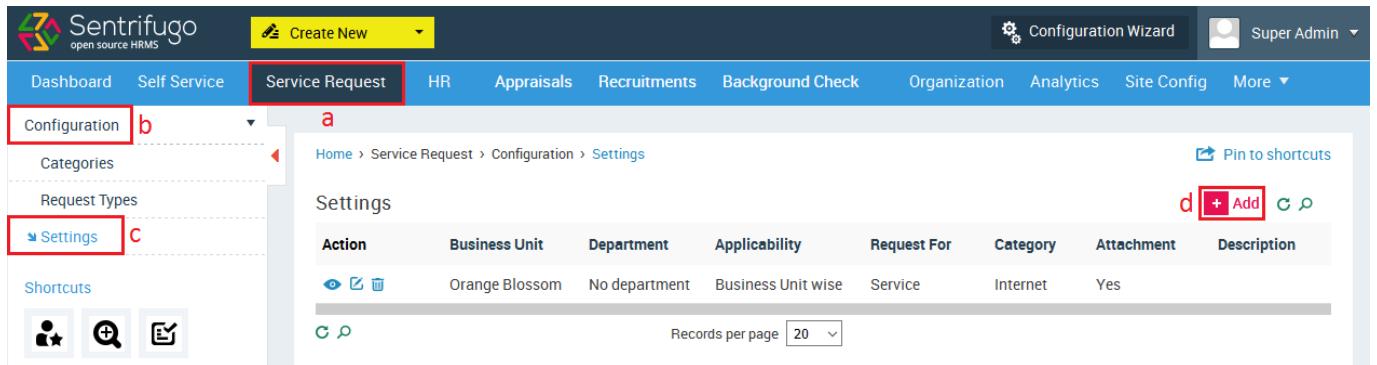


Figure 77

- 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

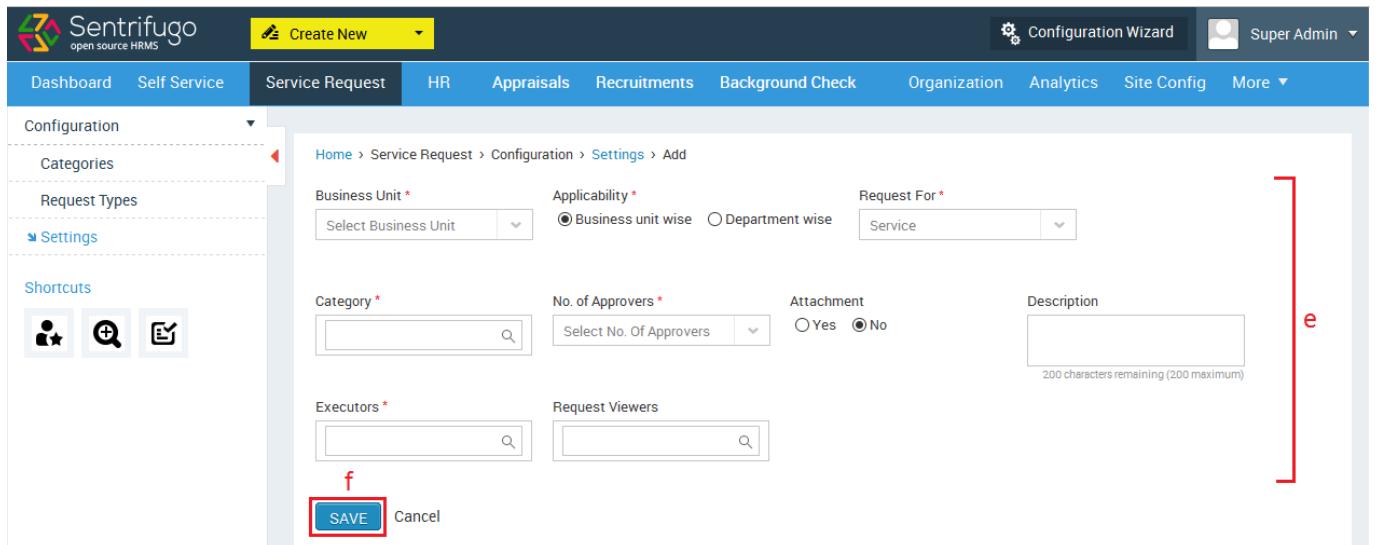


Figure 78

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

5.4 Who are Approvers, Executors and Viewers?

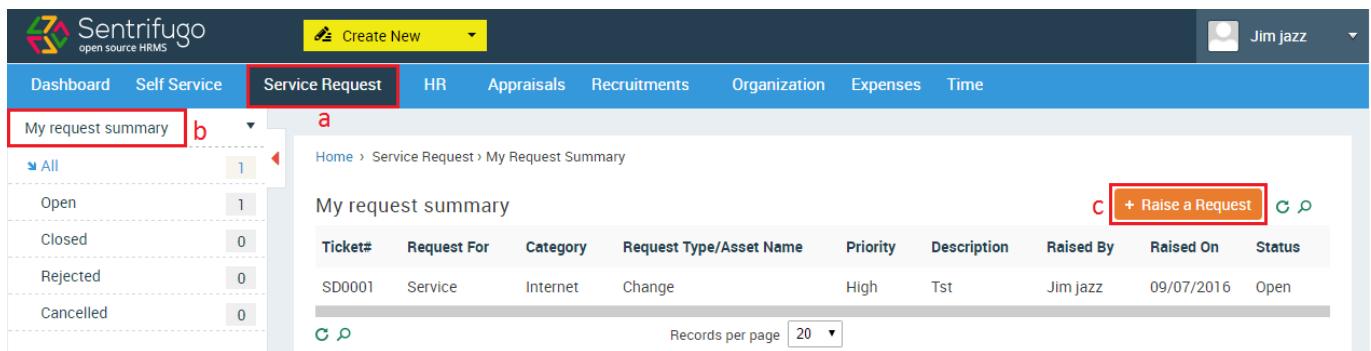
Approvers *Management*: They are responsible for providing approval for service requests. Executor(s) send a request for approval to the Approver(s). You can have a maximum of 3 approvers and a minimum of 1 approver.

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

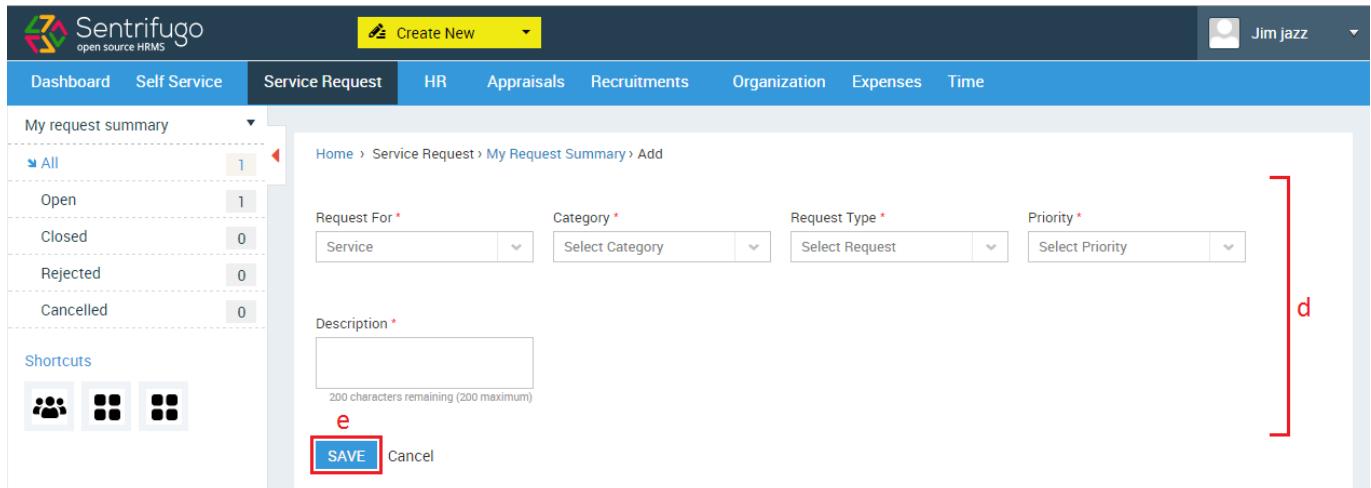


The screenshot shows the Sentrifugo web application. At the top, there's a navigation bar with links for Dashboard, Self Service, Service Request (which is highlighted), HR, Appraisals, Recruitments, Organization, Expenses, and Time. On the far right, there's a user profile for 'Jim jazz'. Below the navigation bar, on the left, is a sidebar with a heading 'My request summary' and a dropdown menu showing counts for All (1), Open (1), Closed (0), Rejected (0), and Cancelled (0). The main content area has a breadcrumb path: Home > Service Request > My Request Summary. It contains 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 visible: SD0001, Service, Internet, Change, High, Tst, Jim jazz, 09/07/2016, Open. There are also buttons for '+ Raise a Request' and a refresh icon. At the bottom of the table, it says 'Records per page' with a dropdown set to 20.

Figure 79

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

Please refer Figure 80



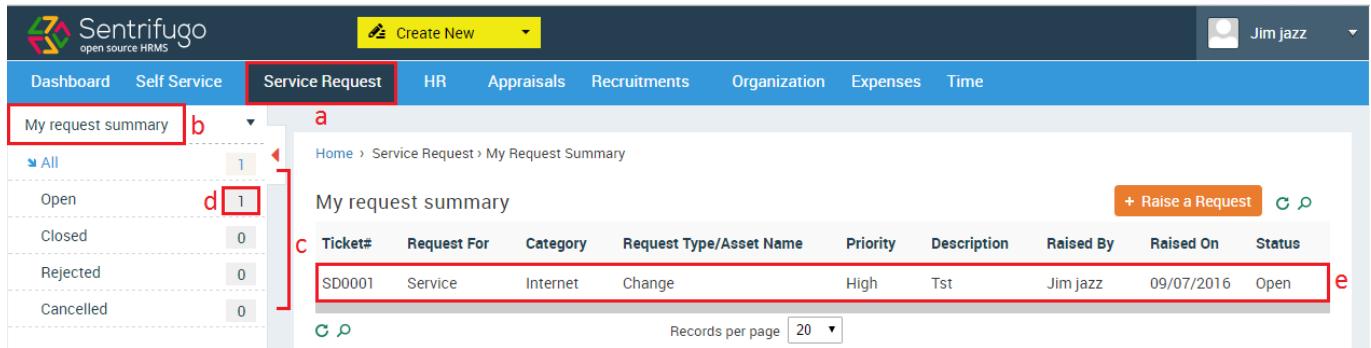
This screenshot shows the 'Add' form for a new service request. The top navigation bar and sidebar are identical to Figure 79. The main content area has a breadcrumb path: Home > Service Request > My Request Summary > Add. The form fields include: 'Request For' (set to 'Service'), 'Category' (dropdown), 'Request Type' (dropdown), 'Priority' (dropdown), and a large text area for 'Description' with a character limit of 200. A red bracket labeled 'd' points to the right side of the form. At the bottom left is a 'SAVE' button (which is highlighted with a red box) and a 'Cancel' link. On the far left, there's a 'Shortcuts' sidebar with three icons.

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



The screenshot shows the Sentrifugo Service Request module. The top navigation bar includes links for Dashboard, Self Service, Service Request (which is highlighted with a red box and labeled 'a'), HR, Appraisals, Recruitments, Organization, Expenses, and Time. A 'Create New' button is also present. On the right, a user profile for 'Jim jazz' is shown.

The main content area displays 'My request summary' (highlighted with a red box and labeled 'b'). It shows a list of service requests categorized by status: All, Open (1), Closed (0), Rejected (0), and Cancelled (0). Each category has a red box around it and a number (1, 0, 0, 0) indicating the count. A red bracket labeled 'c' groups these four categories.

Below this is 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 highlighted with a red box and labeled 'e', showing details for ticket SD0001: Service, Internet, Change, High priority, raised by Jim jazz on 09/07/2016, and currently Open.

At the bottom, there are buttons for '+ Raise a Request' and 'C P'. The 'Records per page' dropdown is set to 20.

Figure 81

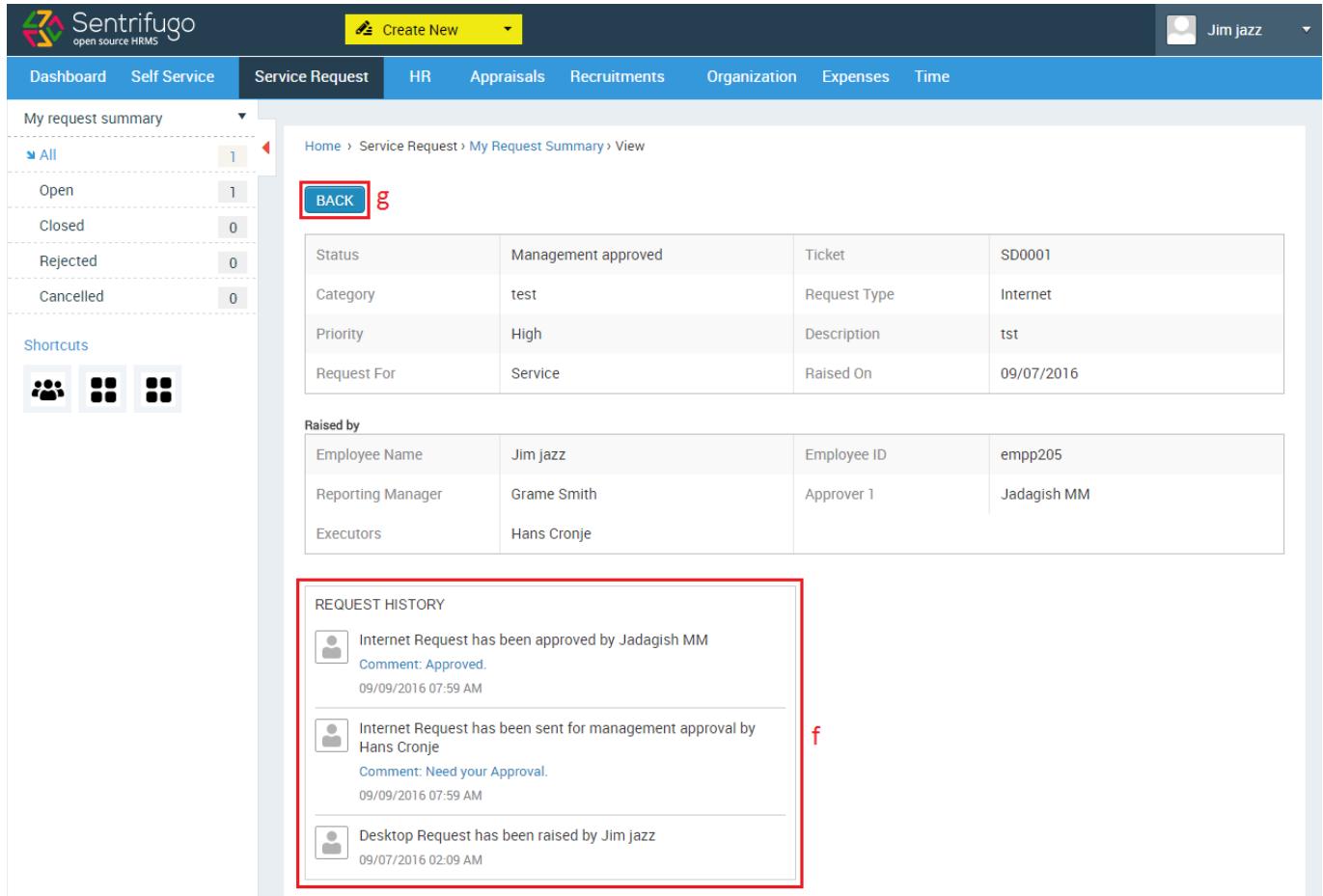
- a. Click **Service Request** in the top menu
- b. Click **My request summary** on the left menu panel

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



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

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

REQUEST HISTORY

-  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

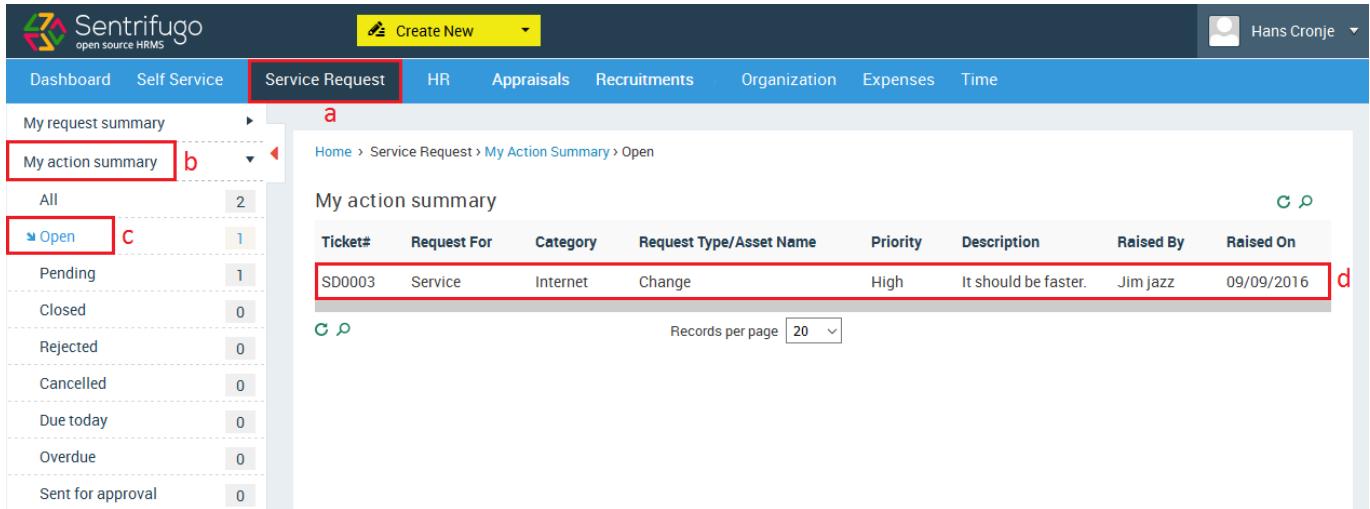
Figure 82

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

5.7 How do I execute a Service Request?

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

Please refer Figure 83



The screenshot shows the Sentrifugo web interface. At the top, there's a navigation bar with links for Dashboard, Self Service, Service Request (which is highlighted), HR, Appraisals, Recruitments, Organization, Expenses, and Time. A 'Create New' button and a user profile for 'Hans Cronje' are also visible. Below the navigation is a sidebar with 'My request summary' and 'My action summary'. The 'My action summary' section is expanded, showing a list of ticket status counts: All (2), Open (1), Pending (1), Closed (0), Rejected (0), Cancelled (0), Due today (0), Overdue (0), and Sent for approval (0). The 'Open' item is highlighted with a red box and labeled 'b'. The main content area shows a table titled 'My action summary' with one record. The table has columns: Ticket#, Request For, Category, Request Type/Asset Name, Priority, Description, Raised By, and Raised On. The single record is: SD0003, Service, Internet, Change, High, 'It should be faster.', Jim jazz, 09/09/2016. A red box highlights this entire row, labeled 'd'. There are also green icons for search and refresh at the top right of the table.

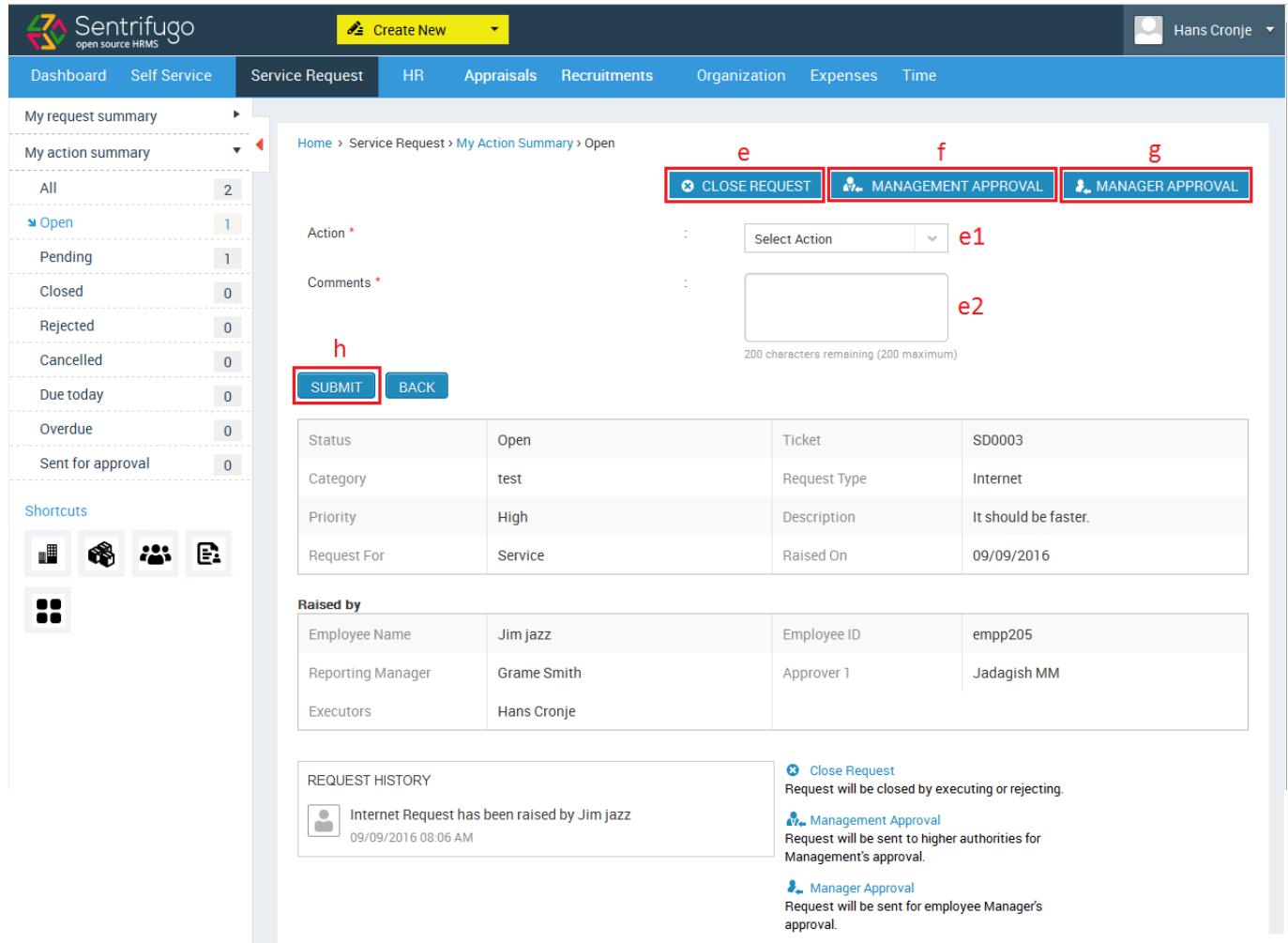
Figure 83

- 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



Service Request > My Action Summary > Open

Action *	: Select Action	e1	
Comments *	: 200 characters remaining (200 maximum)	e2	
SUBMIT BACK		h	
Status	Open	Ticket	SD0003
Category	test	Request Type	Internet
Priority	High	Description	It should be faster.
Request For	Service	Raised On	09/09/2016

Raised by

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

REQUEST HISTORY

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

e f g
e1 e2
h

Figure 84

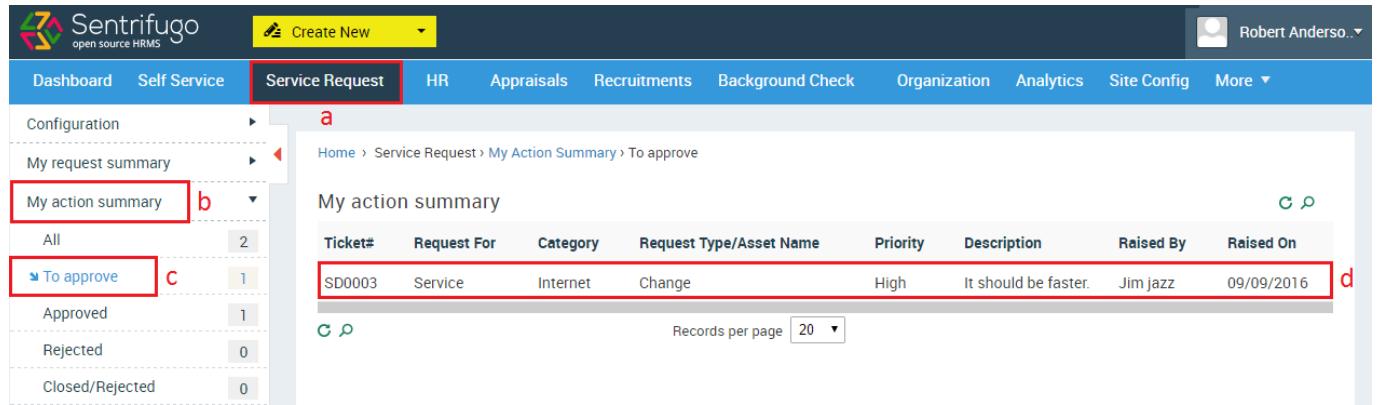
- e. Click **Close request** button to approve/reject the request.
 - e1. Select an action (Approve/Reject)
 - e2. Provide comments.
- f. Request **Management Approval** for the service request (They will be the approver(s) selected while configuring the Service Request Settings)
- g. Request **Manager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

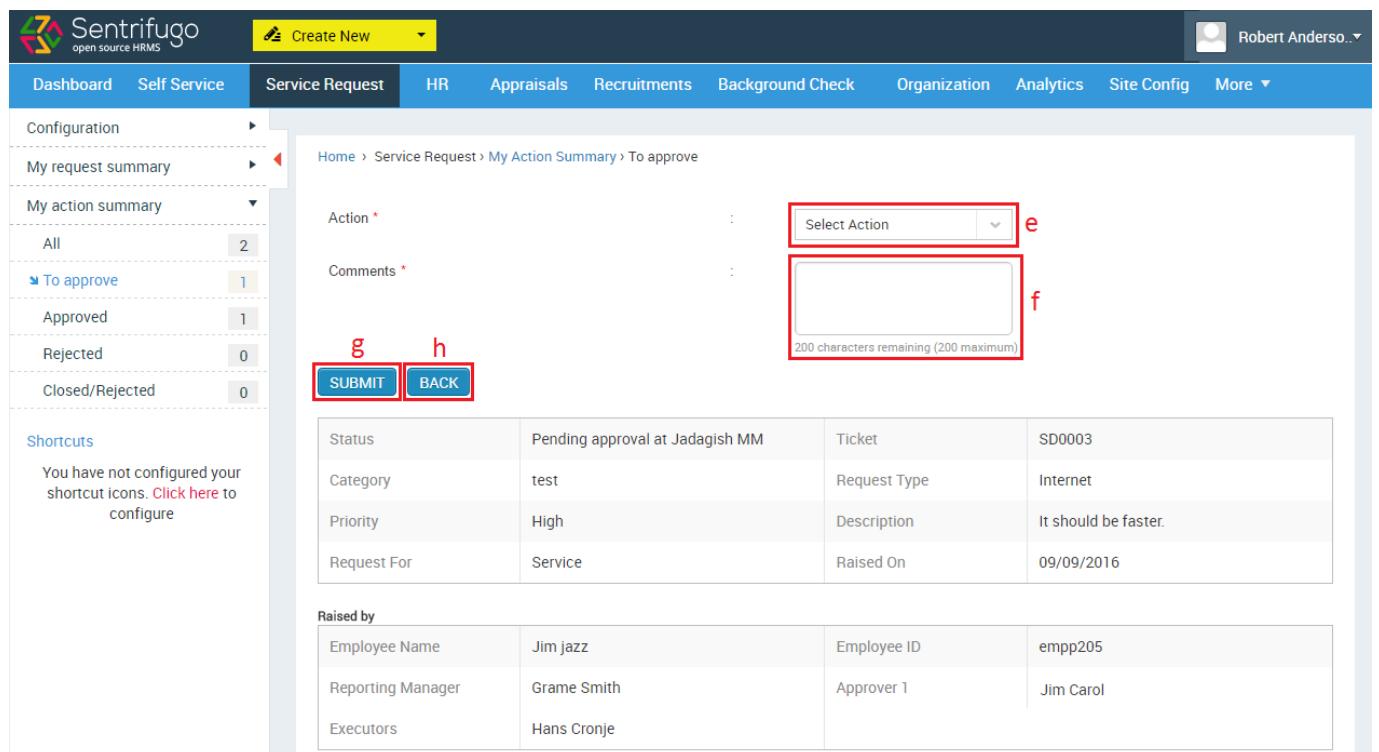


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New' and a user profile for 'Robert Anderso..'. The main menu has tabs for Dashboard, Self Service, Service Request (which is highlighted with a red box), HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar shows 'Configuration' and 'My request summary' sections. Under 'My request summary', there is a 'My action summary' section with a red box around it. This section contains a table with columns: Ticket#, Request For, Category, Request Type/Asset Name, Priority, Description, Raised By, and Raised On. A single row is shown: SD0003, Service, Internet, Change, High, 'It should be faster.', Jim jazz, and 09/09/2016. Below the table are 'C' and 'D' icons. The sidebar also lists 'All' (2), 'To approve' (1), 'Approved' (1), 'Rejected' (0), and 'Closed/Rejected' (0). Labels 'a' through 'd' are placed around the interface: 'a' is above the main menu, 'b' is next to the 'My action summary' box, 'c' is next to 'To approve', and 'd' is next to the table.

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 same interface as Figure 85, but focusing on the 'To approve' ticket. The 'To approve' section in the sidebar is highlighted with a red box. The main area displays the ticket details for SD0003. The 'Action *' field has a dropdown menu with 'Select Action' (highlighted with a red box) and a text area for 'Comments *' (highlighted with a red box). Below these are 'SUBMIT' and 'BACK' buttons. A table at the bottom shows the ticket's status, category, priority, request for, and raised by information. Labels 'e' through 'h' are placed around the interface: 'e' is next to the 'Select Action' dropdown, 'f' is next to the 'Comments' text area, 'g' is next to the 'SUBMIT' button, and 'h' is next to the 'BACK' button.

Status	Pending approval at Jadagish MM	Ticket	SD0003
Category	test	Request Type	Internet
Priority	High	Description	It should be faster.
Request For	Service	Raised On	09/09/2016

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

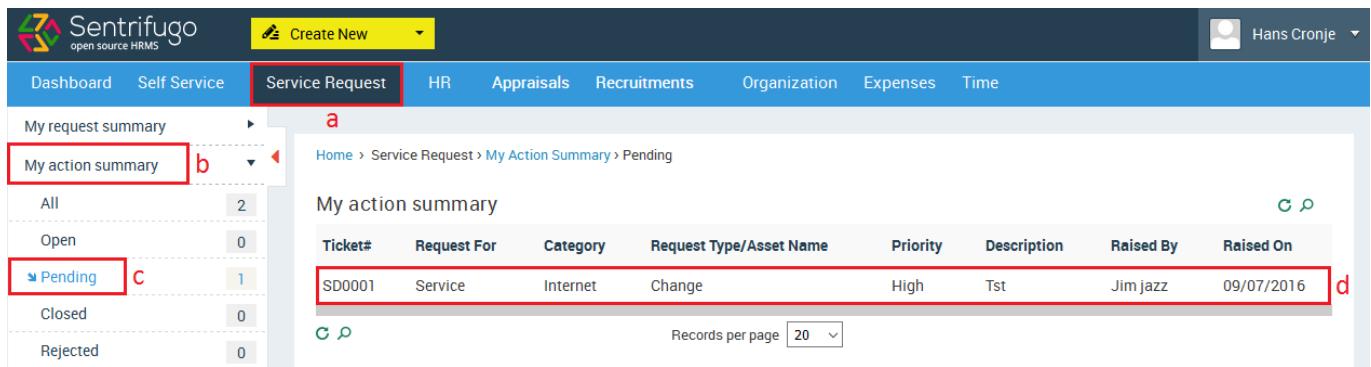
Figure 86

- 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



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)

g SUBMIT BACK

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

Raised by

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

Figure 88

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

6. HR

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

6.1 Adding Employees

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

6.2 How do I manage Roles & Privileges?

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

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

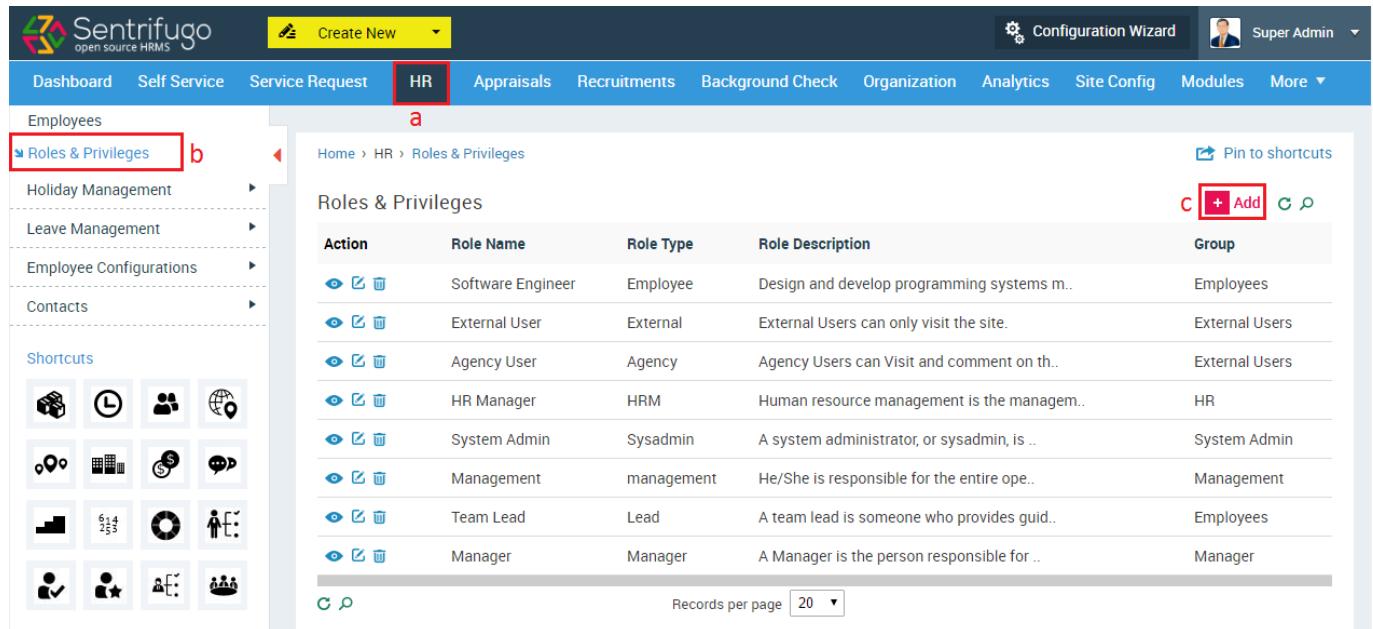
As mentioned earlier in section [1.1 What are the roles available in Sentrifugo?](#), there are 6 main role groups available by default in Sentrifugo:

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

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

To create a new role:

Please refer Figure 89

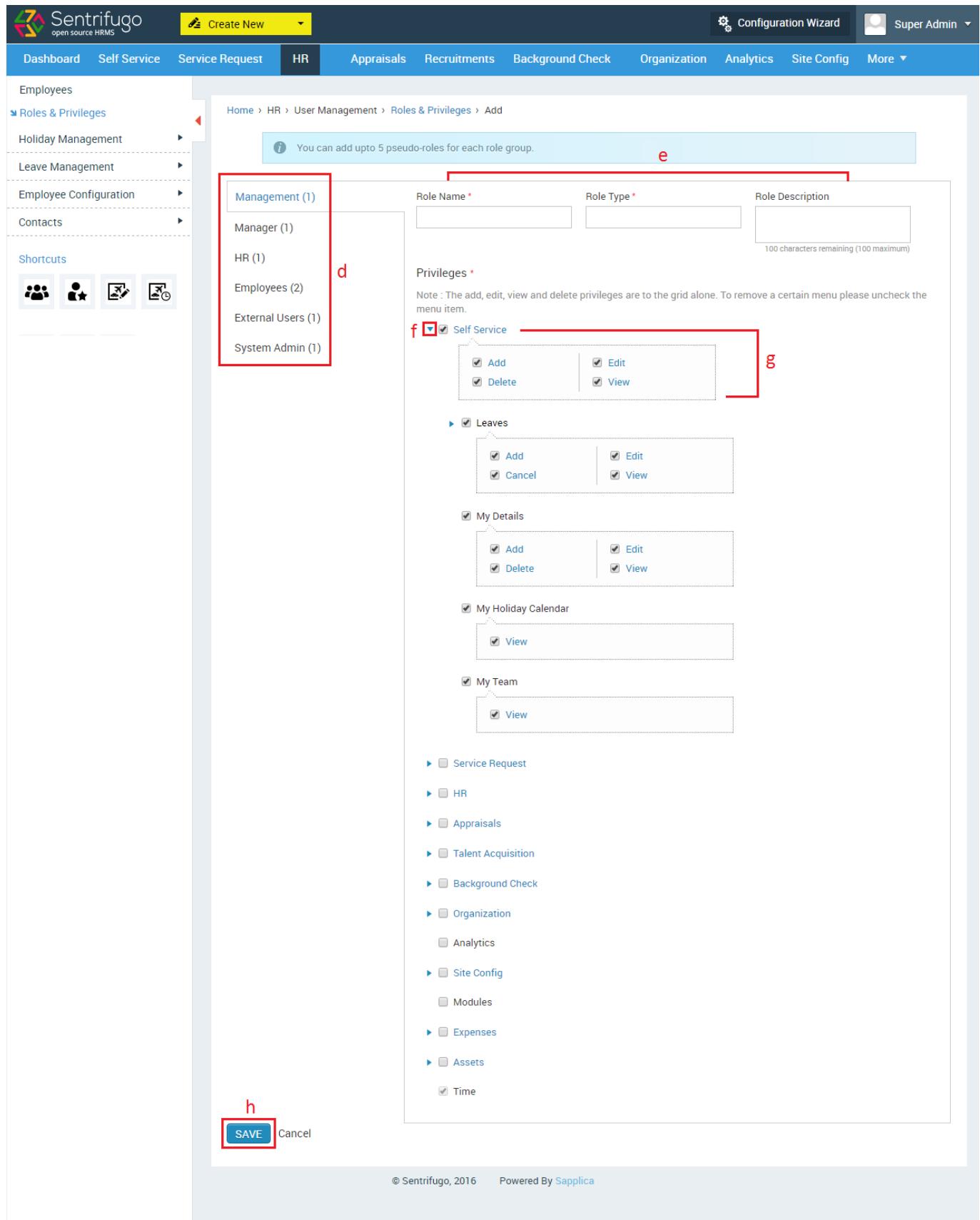


Action	Role Name	Role Type	Role Description	Group
	Software Engineer	Employee	Design and develop programming systems m..	Employees
	External User	External	External Users can only visit the site.	External Users
	Agency User	Agency	Agency Users can Visit and comment on th..	External Users
	HR Manager	HRM	Human resource management is the managem..	HR
	System Admin	Sysadmin	A system administrator, or sysadmin, is ..	System Admin
	Management	management	He/She is responsible for the entire ope..	Management
	Team Lead	Lead	A team lead is someone who provides guid..	Employees
	Manager	Manager	A Manager is the person responsible for ..	Manager

Figure 89

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

Please refer Figure 90



The screenshot shows the Sentrifugo HR module's 'Roles & Privileges' section. A red box labeled 'd' highlights the 'Management (1)' group under 'Employees'. A blue box labeled 'e' contains a note: 'You can add upto 5 pseudo-roles for each role group.' A red box labeled 'f' surrounds the 'Self Service' privileges section, which includes 'Add', 'Edit', and 'Delete' options. A blue box labeled 'g' surrounds the 'Leaves' privileges section, which includes 'Add', 'Edit', and 'Cancel' options. A red box labeled 'h' surrounds the 'SAVE' button at the bottom left.

Role Groups:

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

Privileges:

Note : The add, edit and view 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
--

Navigation:

- Service Request
- HR
- Appraisals
- Talent Acquisition
- Background Check
- Organization
- Analytics
- Site Config
- Modules
- Expenses
- Assets
- Time

Buttons:

- SAVE
- Cancel

Figure 90

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

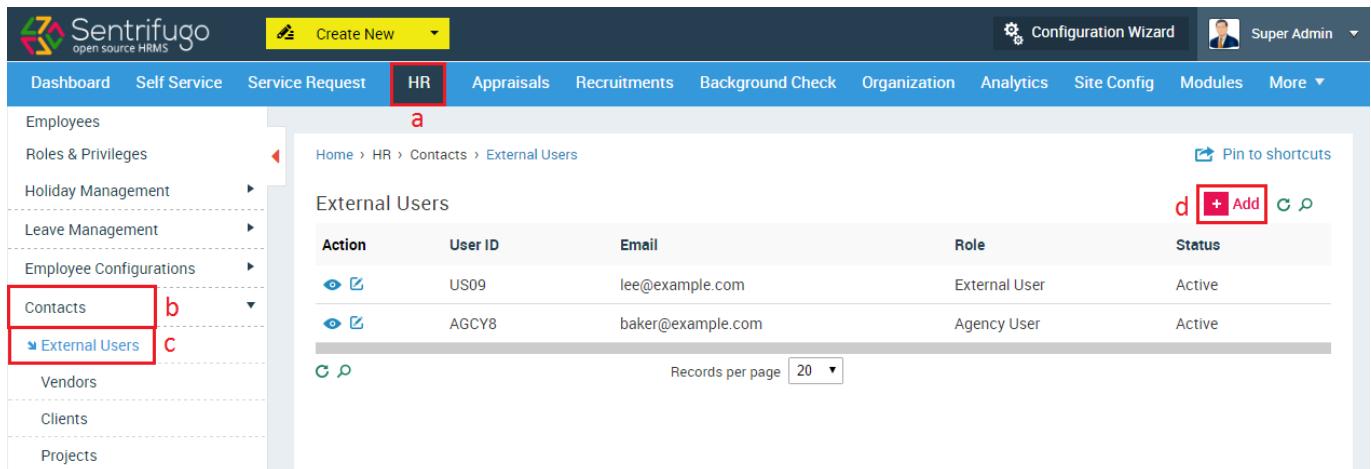
6.3 How do I add External Users?

External Users have limited access to information on Sentrifugo. There are 2 types of External Users in this application:

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

For other external roles such as Vendors and Clients, please refer [Contacts](#).

Please refer Figure 91



The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. 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, Modules, and More. A left sidebar lists Employees, Roles & Privileges, Holiday Management, Leave Management, Employee Configurations, Contacts (highlighted with a red box 'b'), External Users (highlighted with a red box 'c'), Vendors, Clients, and Projects. The 'External Users' page displays a table with columns: Action, User ID, Email, Role, and Status. Two rows are shown: one for US09 (Email: lee@example.com, Role: External User, Status: Active) and another for AGCY8 (Email: baker@example.com, Role: Agency User, Status: Active). A red box 'd' highlights the '+Add' button on the right.

Figure 91

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

Please refer Figure 92

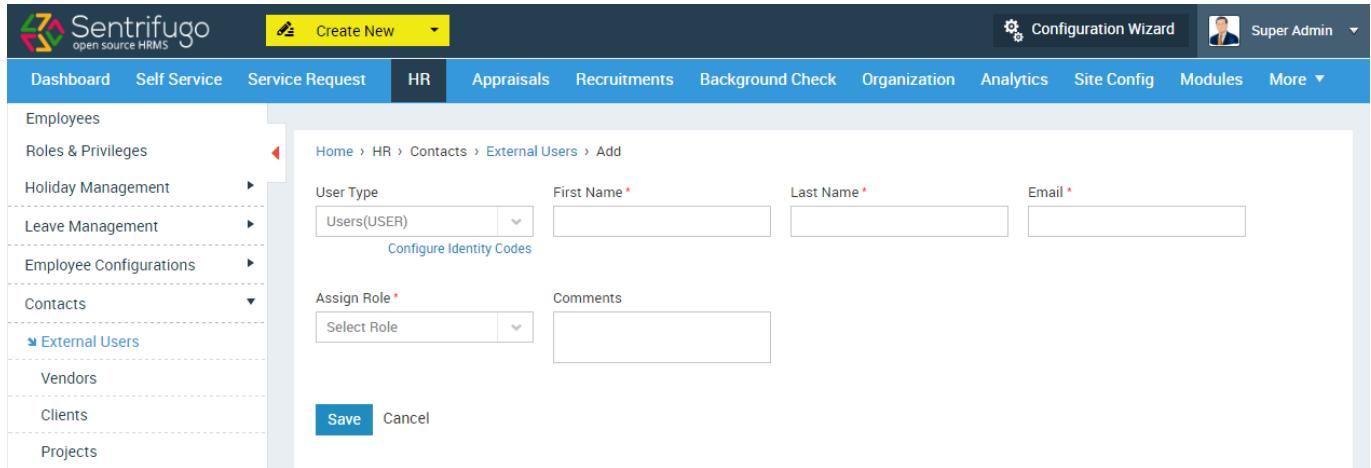


Figure 92

- 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

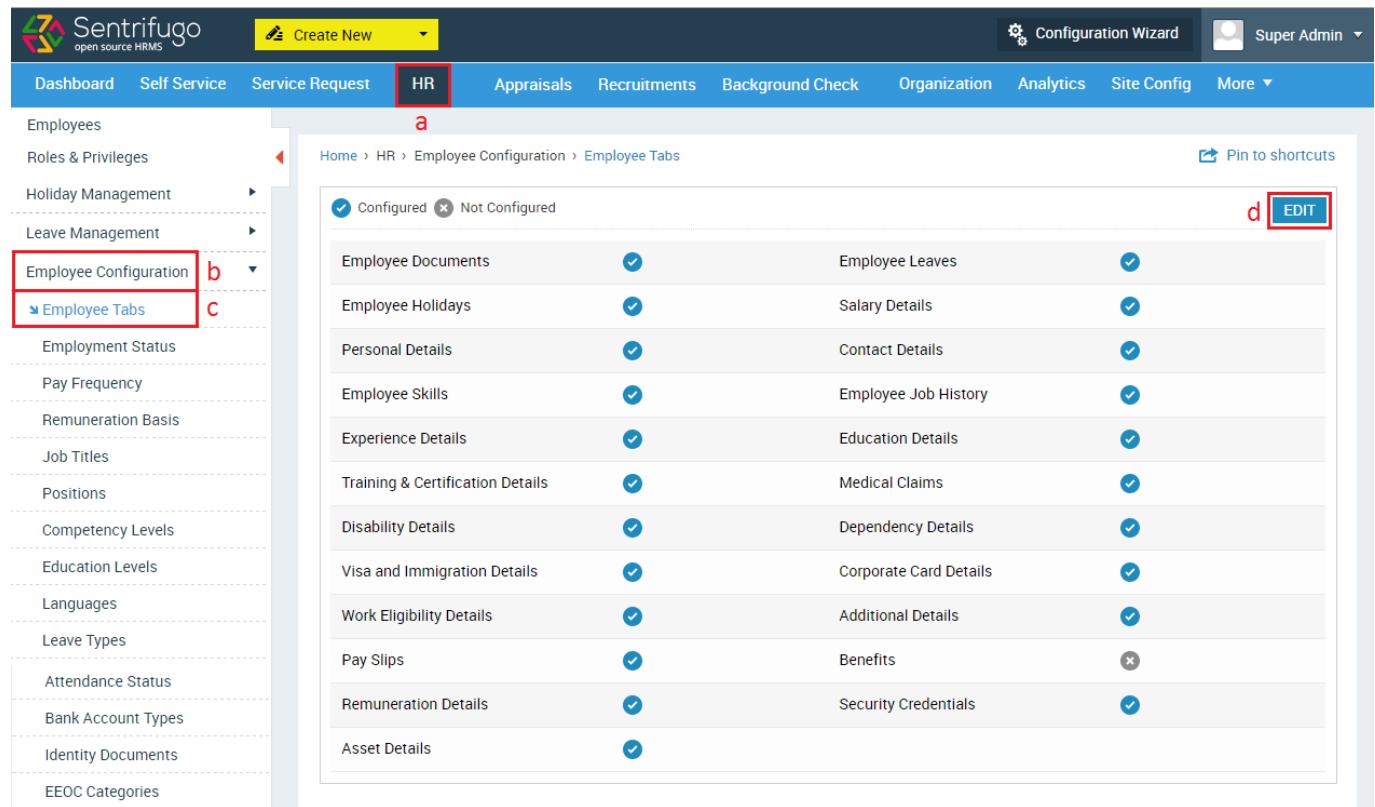
Please refer section [3. Leave Management](#)

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



a

b

c

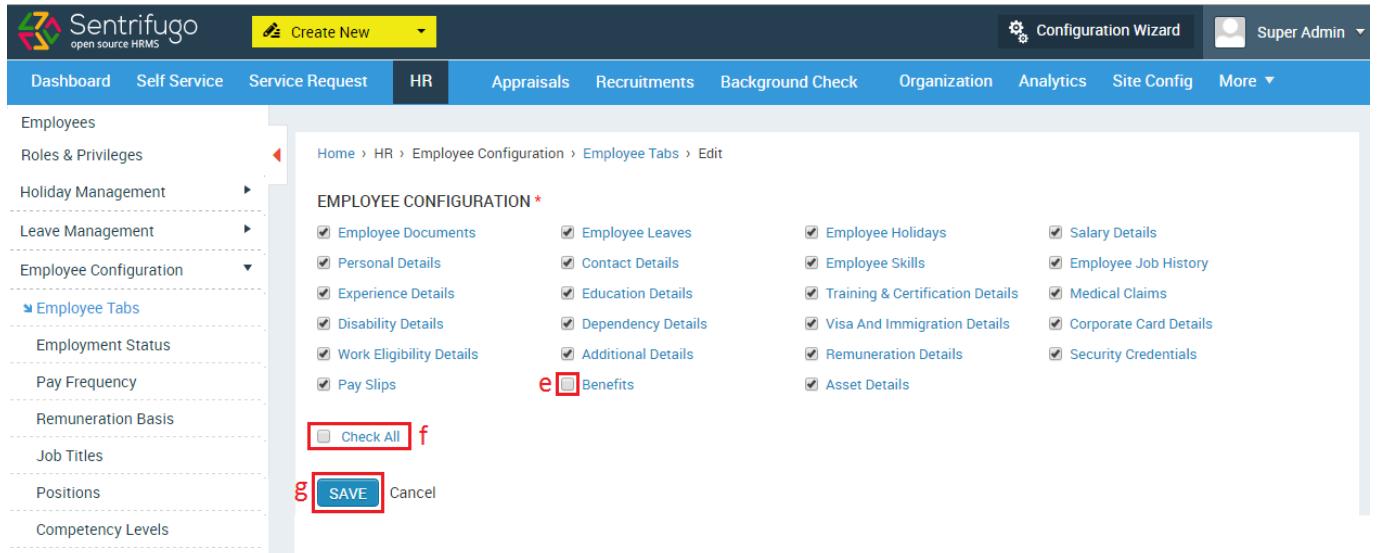
d

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



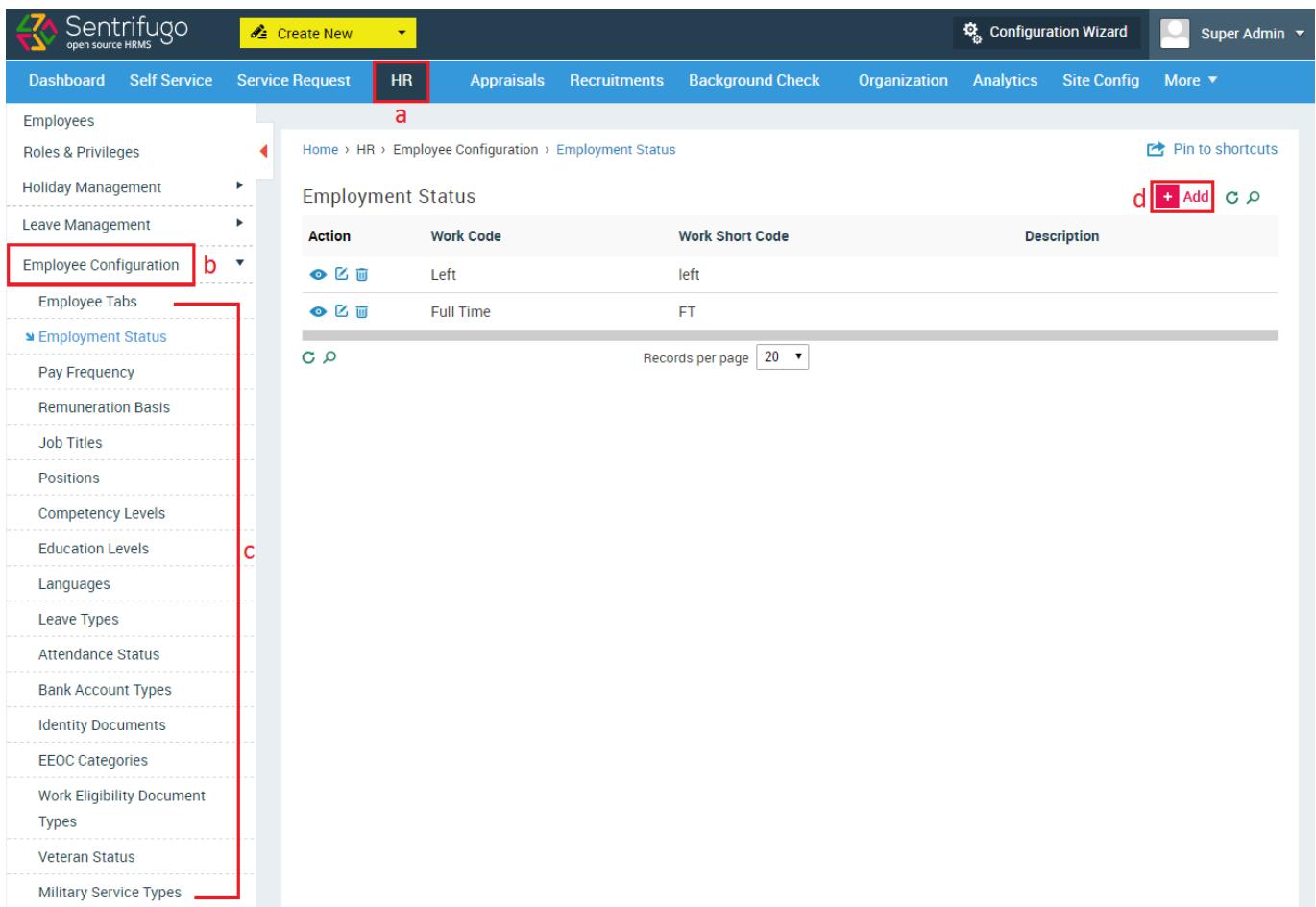
The screenshot shows the Sentrifugo HRM system interface. The top navigation bar includes the logo, a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. The main menu has tabs for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists various management modules: Employees, Roles & Privileges, Holiday Management, Leave Management, Employee Configuration (selected), Employee Tabs (highlighted with a red arrow), Employment Status, Pay Frequency, Remuneration Basis, Job Titles, Positions, and Competency Levels. The central content area is titled 'EMPLOYEE CONFIGURATION *' and displays a grid of checkboxes for employee details. A red box labeled 'e' surrounds the 'Benefits' section, which includes checkboxes for 'Employee Leaves', 'Contact Details', 'Education Details', 'Dependency Details', 'Additional Details', and 'Benefits'. Below this is a 'Check All' checkbox. At the bottom right are 'SAVE' and 'Cancel' buttons, with a red box labeled 'g' around the 'SAVE' button.

Figure 94

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

6.6.2 How do I set Employee Configuration?

Please refer Figure 95



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

b. Click **Employee Configuration** on the left panel

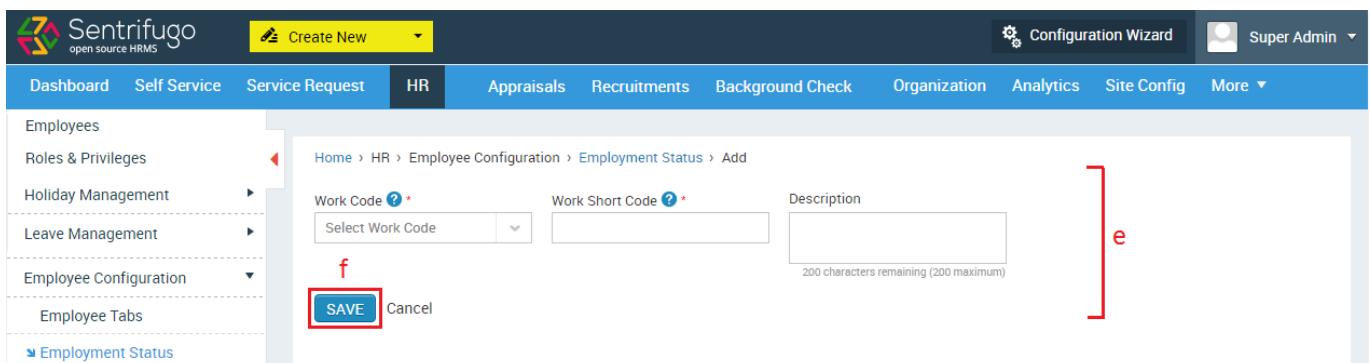
c. Click any sub menu option you would like to add (We have chosen 'Employment Status' as an example)

d. Click **+Add** button on the right side panel

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



e. The 'Description' field has a character limit of 200 characters.

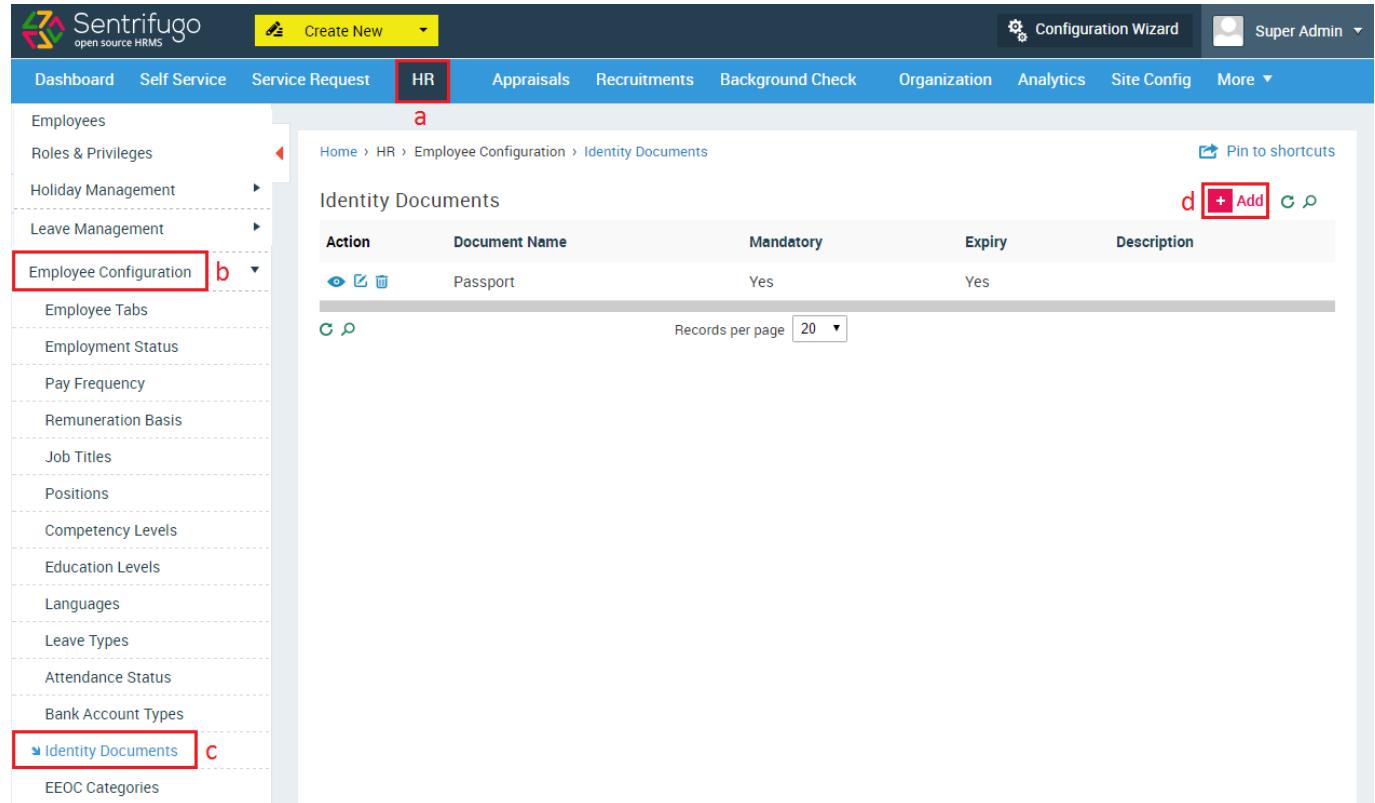
f. The 'SAVE' button is highlighted with a red box.

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

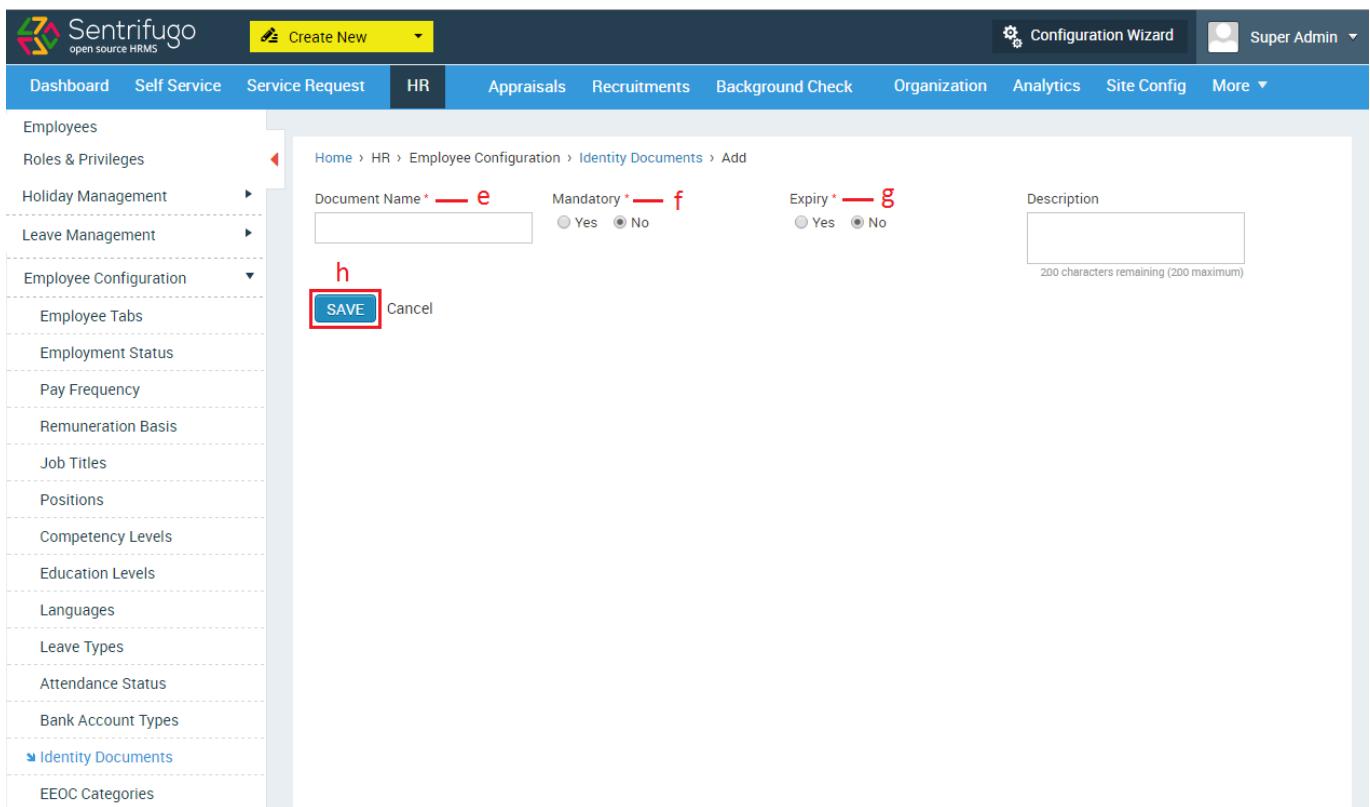


Action	Document Name	Mandatory	Expiry	Description
	Passport	Yes	Yes	

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 bar has links 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: Employees, Roles & Privileges, Holiday Management, Leave Management, Employee Configuration (selected), Employee Tabs, Employment Status, Pay Frequency, Remuneration Basis, Job Titles, Positions, Competency Levels, Education Levels, Languages, Leave Types, Attendance Status, Bank Account Types, Identity Documents (selected), and EEOC Categories. The central content area shows a 'Home > HR > Employee Configuration > Identity Documents > Add' path. It contains fields for 'Document Name' (labeled e), 'Mandatory' (radio buttons for Yes or No, labeled f), 'Expiry' (radio buttons for Yes or No, labeled g), and a 'Description' text area with a character limit of 200 (labeled d). A red box highlights the 'SAVE' button (labeled h).

Figure 98

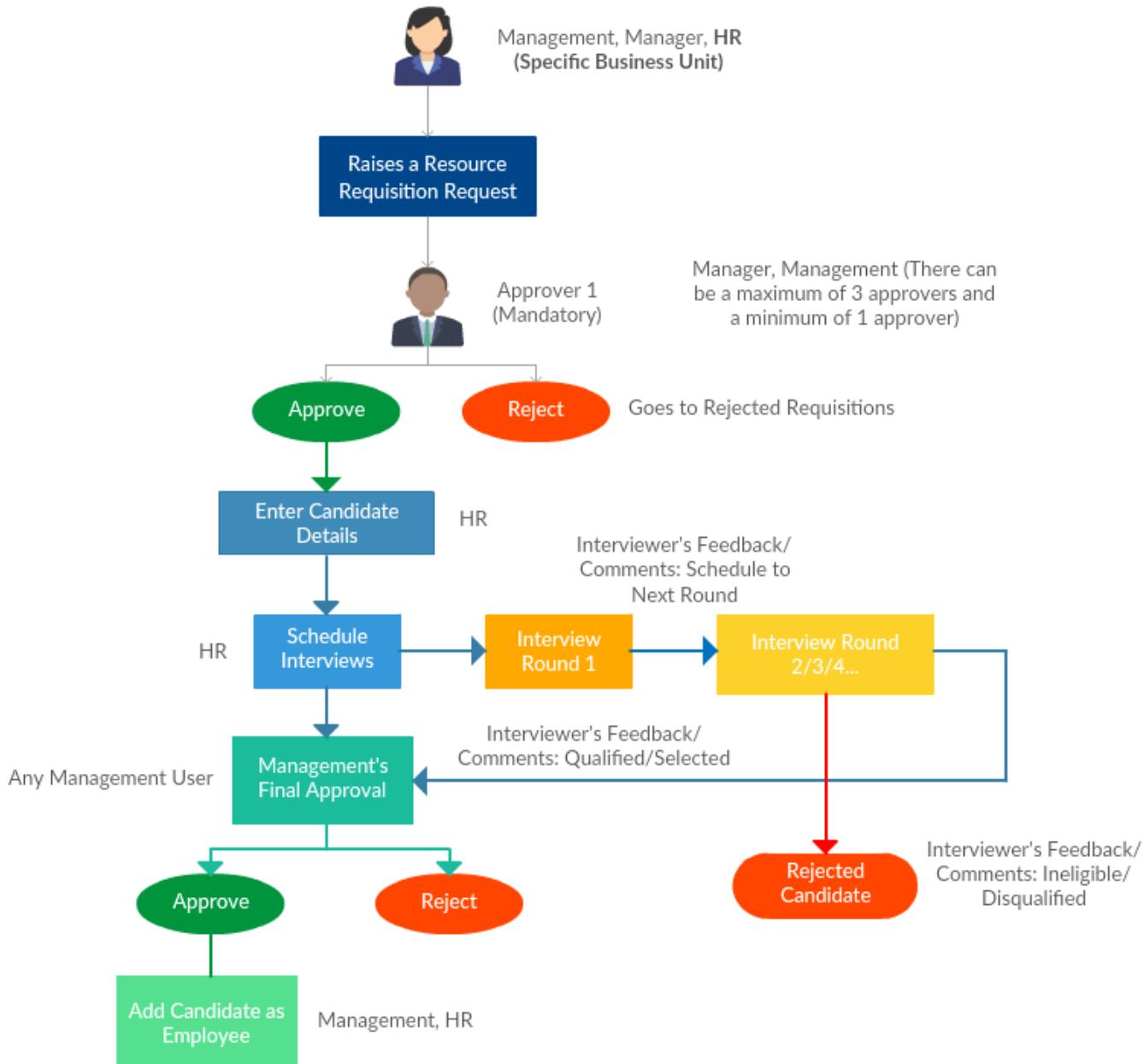
- e. Enter document name
- f. Select if you require a document to be mandatory or not
- g. Select if documents needs to have an expiry date
- h. Click **SAVE** button



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

7. 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.

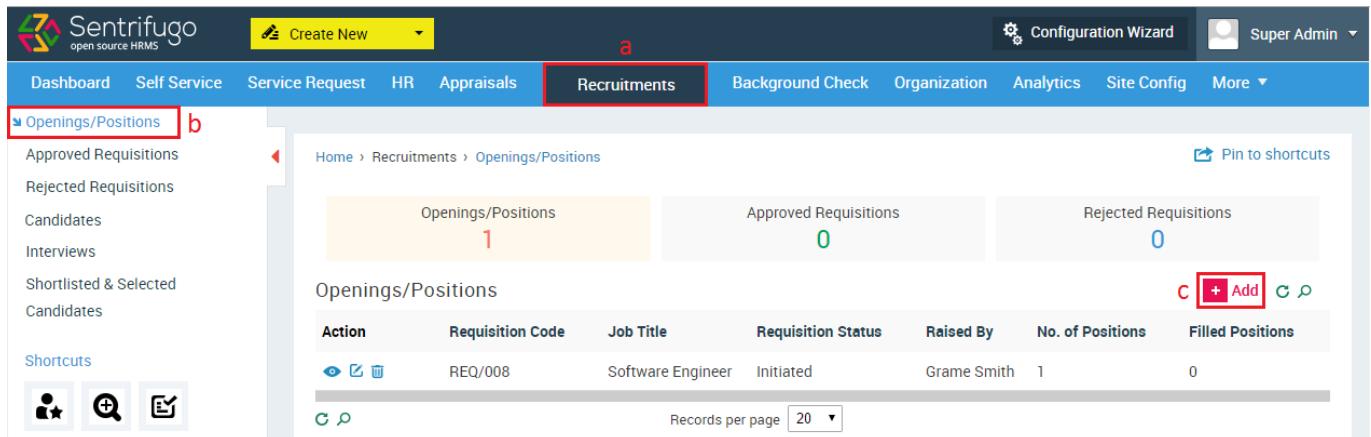


Description:

- 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

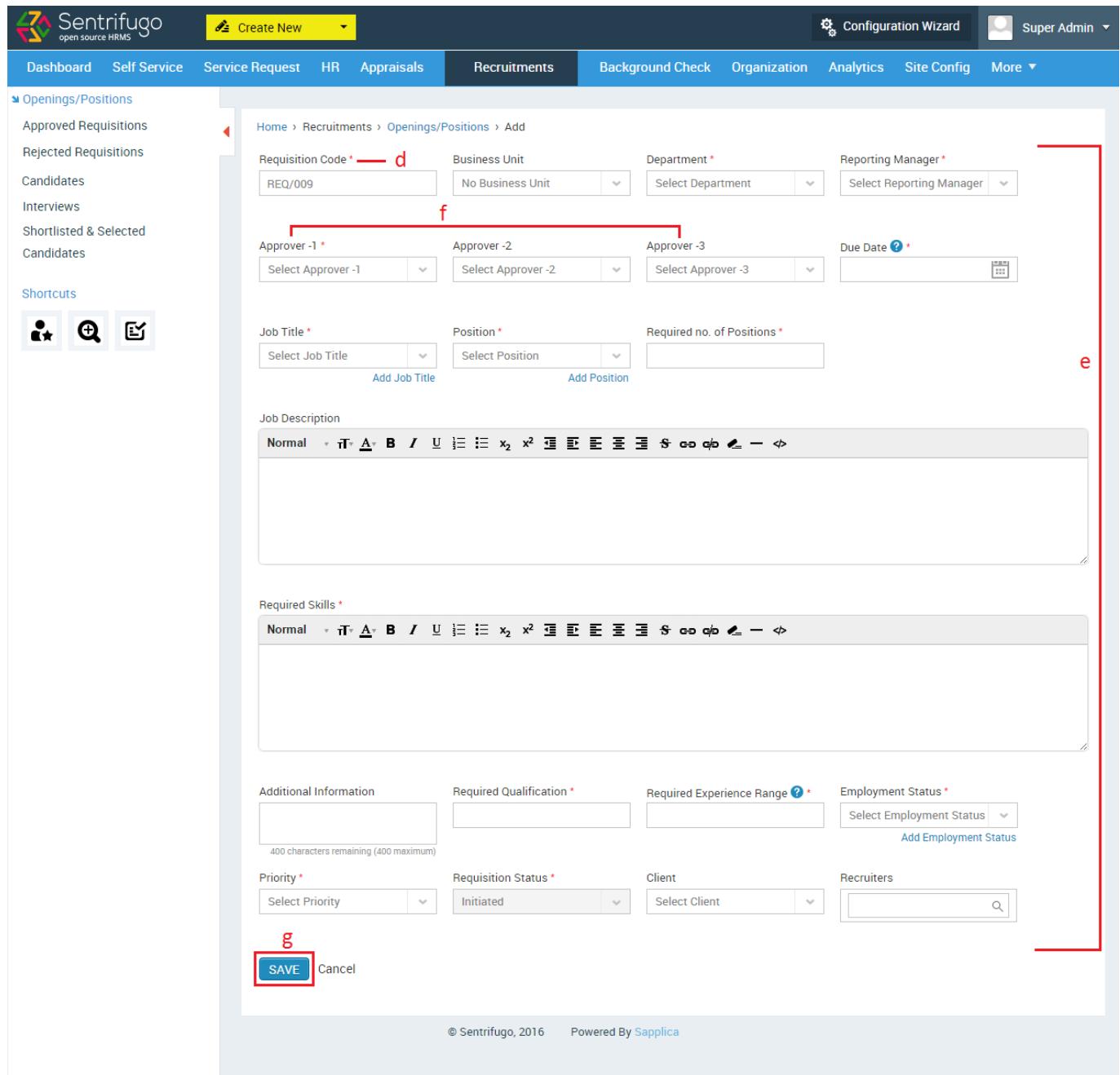


The screenshot shows the Sentrifugo HRMS interface. At the top, there is a navigation bar with the Sentrifugo logo, a 'Create New' button, a 'Configuration Wizard' button, and a 'Super Admin' dropdown. Below the navigation bar is a main menu with tabs: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (which is highlighted with a red box 'a'), Background Check, Organization, Analytics, Site Config, and More. On the left side, there is a sidebar with a tree view: Approved Requisitions, Rejected Requisitions, Candidates, Interviews, Shortlisted & Selected Candidates, and Shortcuts. Under Shortcuts, there are icons for users, search, and export. The main content area shows a summary of Openings/Positions (1), Approved Requisitions (0), and Rejected Requisitions (0). Below this is a table titled 'Openings/Positions' with columns: Action, Requisition Code, Job Title, Requisition Status, Raised By, No. of Positions, and Filled Positions. One record is listed: REQ/008, Software Engineer, Initiated, Grame Smith, 1, 0. At the bottom of the table are buttons for 'New', 'Edit', and 'Delete'. The bottom right corner of the table has a red box around the '+Add' button.

Figure 99

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

Please refer Figure 100



The screenshot shows the Sentrifugo HRMS interface for creating a new opening/position. 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 shows the 'Add' screen for a requisition. Key fields include:

- Requisition Code: REQ/009 (marked with 'd')
- Business Unit: No Business Unit
- Department: Select Department
- Reporting Manager: Select Reporting Manager
- Approvers: Approver -1, Approver -2, Approver -3 (each with a dropdown marked with 'f')
- Due Date: [empty]
- Job Title: Select Job Title (marked with 'e')
- Position: Select Position
- Required no. of Positions: [empty]
- Job Description: A rich text editor with a toolbar.
- Required Skills: Another rich text editor with a toolbar.
- Additional Information: Text area with a character limit of 400.
- Required Qualification: Text area.
- Required Experience Range: [empty]
- Employment Status: Select Employment Status (marked with 'e')
- Priority: Select Priority
- Requisition Status: Initiated
- Client: Select Client
- Recruiters: Search input

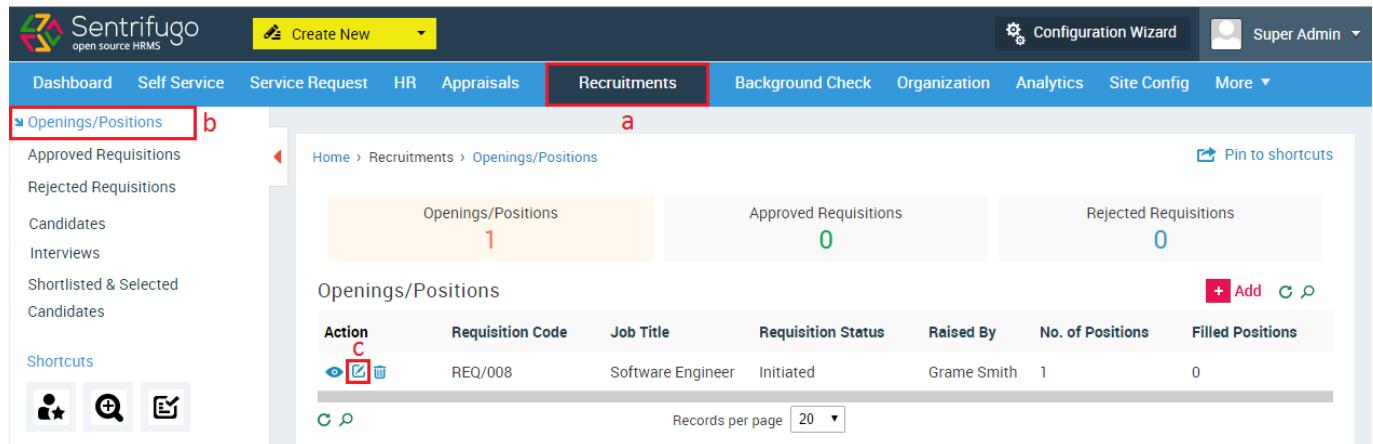
At the bottom, there are 'SAVE' and 'Cancel' buttons, with 'SAVE' being highlighted with a red box and an arrow 'g' pointing to it.

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

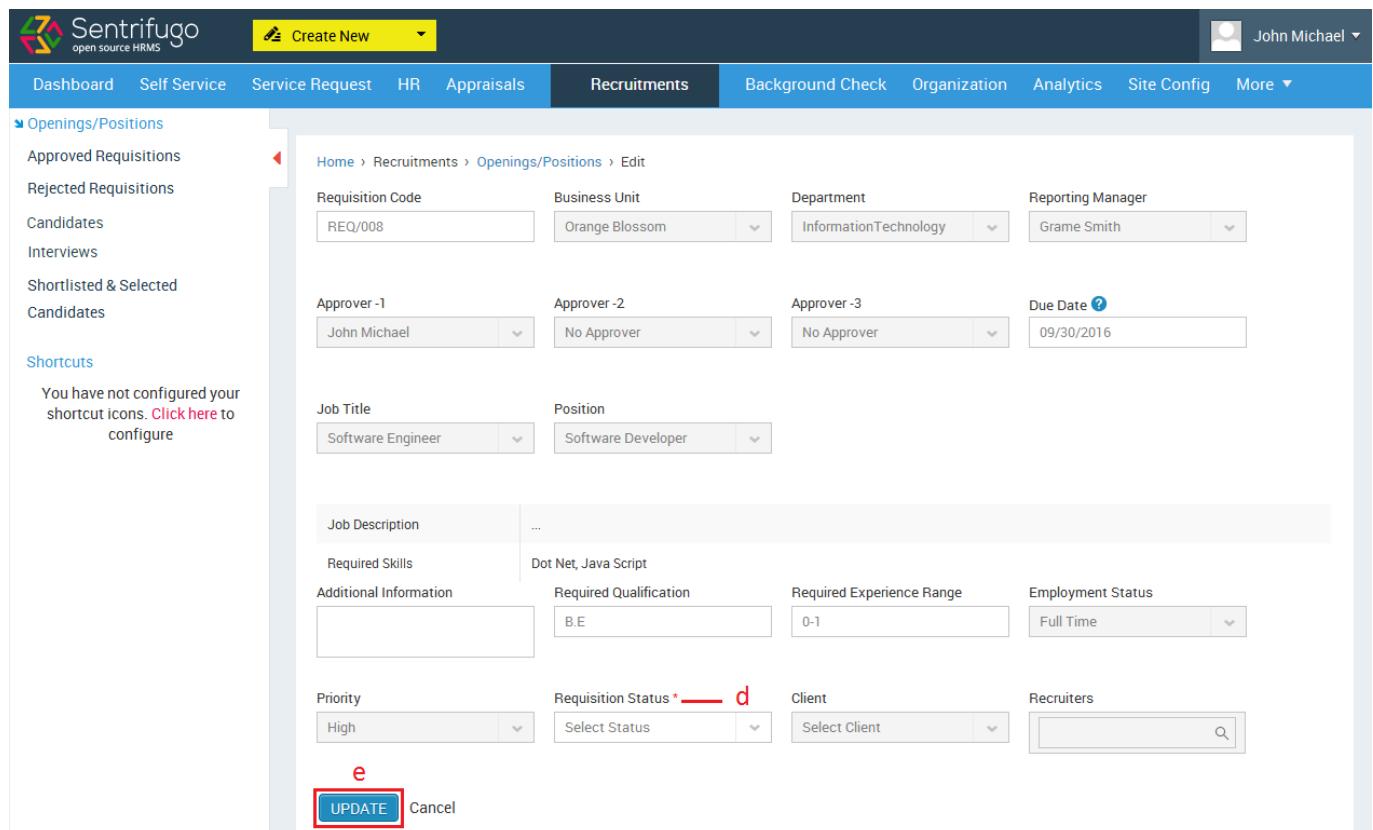


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Configuration Wizard', 'Super Admin', and other menu items like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The 'Recruitments' tab is active and highlighted with a red box. On the left, a sidebar has 'Openings/Positions' selected and highlighted with a red box labeled 'b'. The main content area shows a summary of openings: 1 Openings/Positions, 0 Approved Requisitions, and 0 Rejected Requisitions. Below this is a table titled 'Openings/Positions' with columns: Action, Requisition Code, Job Title, Requisition Status, Raised By, No. of Positions, and Filled Positions. A single row is shown for a requisition with code REQ/008, job title Software Engineer, status Initiated, raised by Grame Smith, 1 position, and 0 filled. An 'Edit' icon in the Action column is highlighted with a red box labeled 'c'.

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



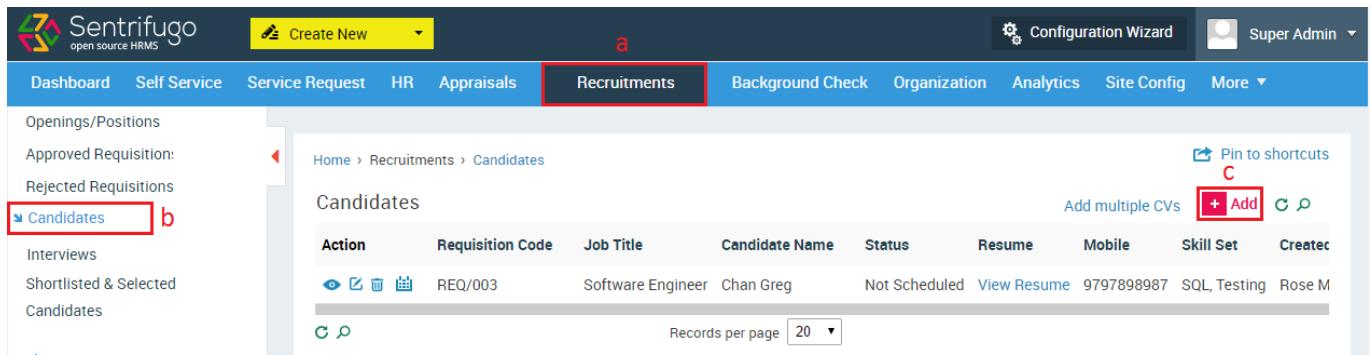
The screenshot shows the 'Edit' screen for a requisition. The top navigation bar and sidebar are identical to Figure 101. The main content area shows a form for editing a requisition. Fields include: Requisition Code (REQ/008), Business Unit (Orange Blossom), Department (InformationTechnology), Reporting Manager (Grame Smith). Approval fields show Approver-1 (John Michael), Approver-2 (No Approver), Approver-3 (No Approver), and Due Date (09/30/2016). Job details show Job Title (Software Engineer) and Position (Software Developer). Other fields include: Job Description (ellipsis), Required Skills (Dot Net, Java Script), Additional Information (B.E.), Required Qualification (B.E.), Required Experience Range (0-1), Employment Status (Full Time), Priority (High), Requisition Status (Select Status), Client (Select Client), and Recruiters (Search input). A red box labeled 'e' highlights the 'UPDATE' button at the bottom left, and another red box labeled 'd' highlights the 'Requisition Status' dropdown.

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

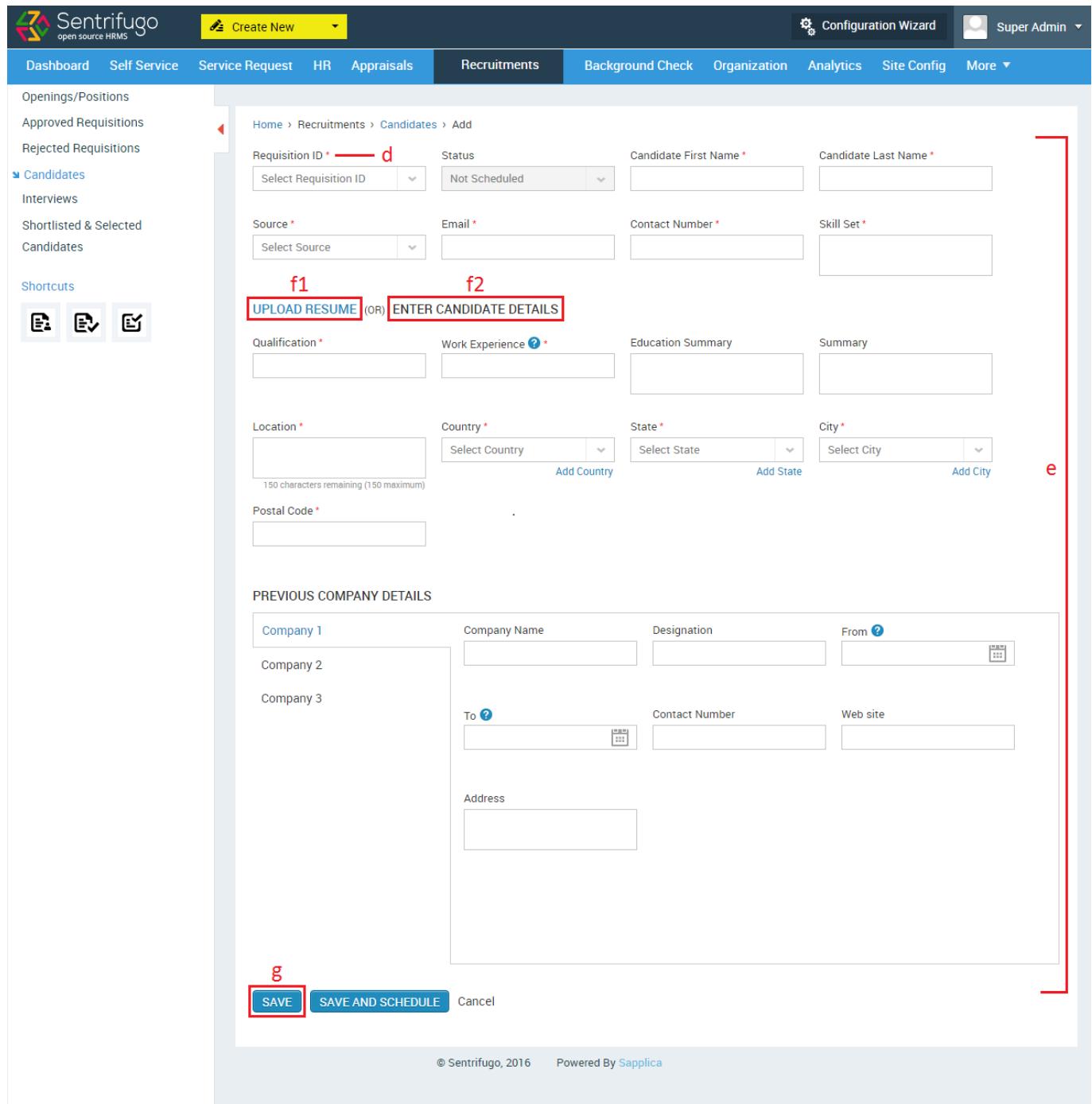


Action	Requisition Code	Job Title	Candidate Name	Status	Resume	Mobile	Skill Set	Created
	REQ/003	Software Engineer	Chan Greg	Not Scheduled	View Resume	9797898987	SQL, Testing	Rose M

Figure 103

- 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' 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 (selected), Interviews, Shortlisted & Selected Candidates, and Shortcuts. The main content area displays a form for adding a candidate. Key fields include Requisition ID (dropdown, highlighted by red box 'd'), Status (dropdown), Candidate First Name and Last Name (text inputs), Source (dropdown), Email (text input), Contact Number (text input), Skill Set (text input), Qualification (text input), Work Experience (dropdown), Education Summary (text input), Summary (text input), Location (text input), Country (dropdown), State (dropdown), City (dropdown), Postal Code (text input), and Previous Company Details (Company 1, Company Name, Designation, From, To, Contact Number, Web site, Address). Buttons at the bottom include 'SAVE' (highlighted by red box 'g'), 'SAVE AND SCHEDULE', and 'Cancel'. The footer indicates © Sentrifugo, 2016 and Powered By Sapplica.

Figure 104

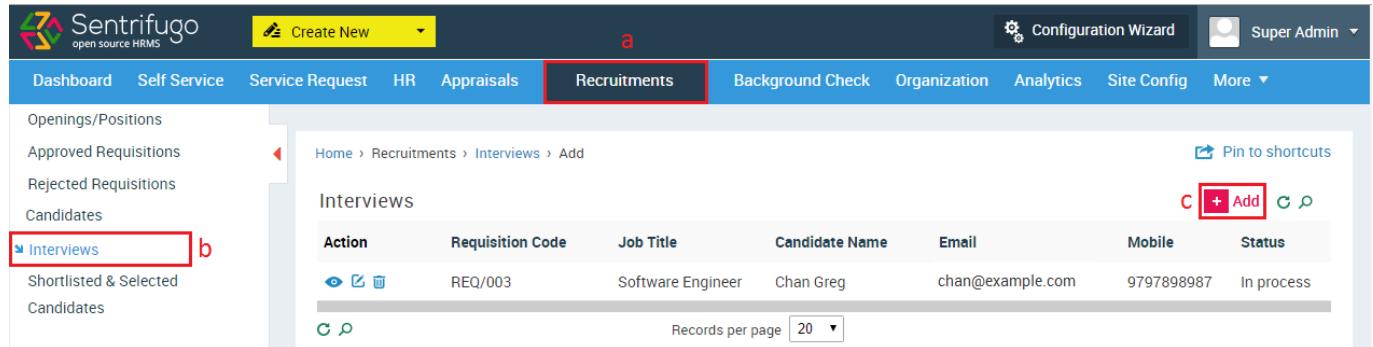
- d. Select the Requisition ID
- e. Enter Candidate's name
- f1. Click to upload resume

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

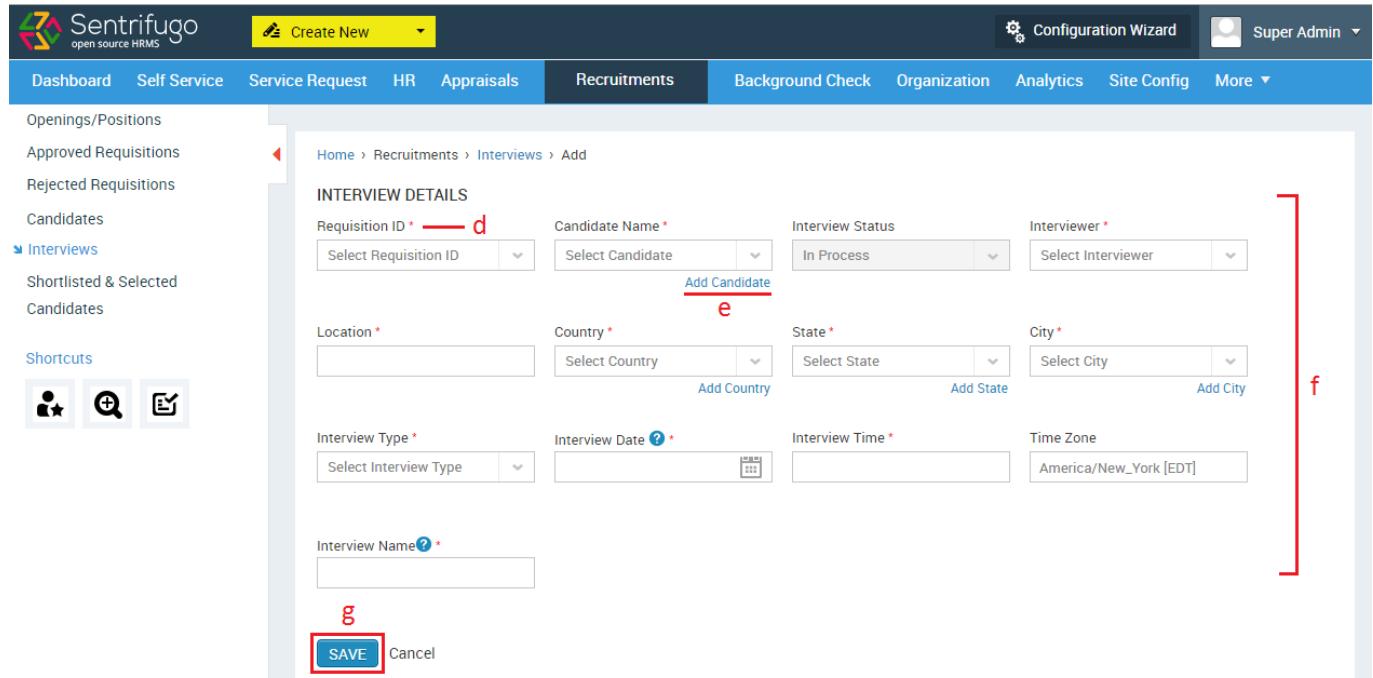


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Create New, Configuration Wizard, Super Admin, Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (which is highlighted with a red box), Background Check, Organization, Analytics, Site Config, and More. On the left sidebar, there are links for Openings/Positions, Approved Requisitions, Rejected Requisitions, Candidates, and Interviews (which is also highlighted with a red box). The main content area displays a table titled 'Interviews' with columns for Action, Requisition Code, Job Title, Candidate Name, Email, Mobile, and Status. A single row is shown: Requisition ID REQ/003, Job Title Software Engineer, Candidate Name Chan Greg, Email chan@example.com, Mobile 9797898987, and Status In process. There are buttons for Pin to shortcuts, + Add, and a search icon.

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 Sentrifugo HRMS interface for adding an interview. The top navigation bar and left sidebar are identical to Figure 105. The main content area is titled 'INTERVIEW DETAILS'. It contains fields for Requisition ID (with a dropdown labeled 'd'), Candidate Name (with a dropdown labeled 'e'), Interview Status (In Process), Interviewer (with a dropdown), Location (with a dropdown), Country (with a dropdown), State (with a dropdown), City (with a dropdown), Interview Type (with a dropdown), Interview Date (with a date picker), Interview Time (with a time picker), and Time Zone (America/New_York [EDT]). Below these fields is an 'Interview Name' field with a question mark icon. At the bottom are 'SAVE' and 'Cancel' buttons, with 'SAVE' being highlighted with a red box. A large red bracket on the right side covers the entire right half of the form area.

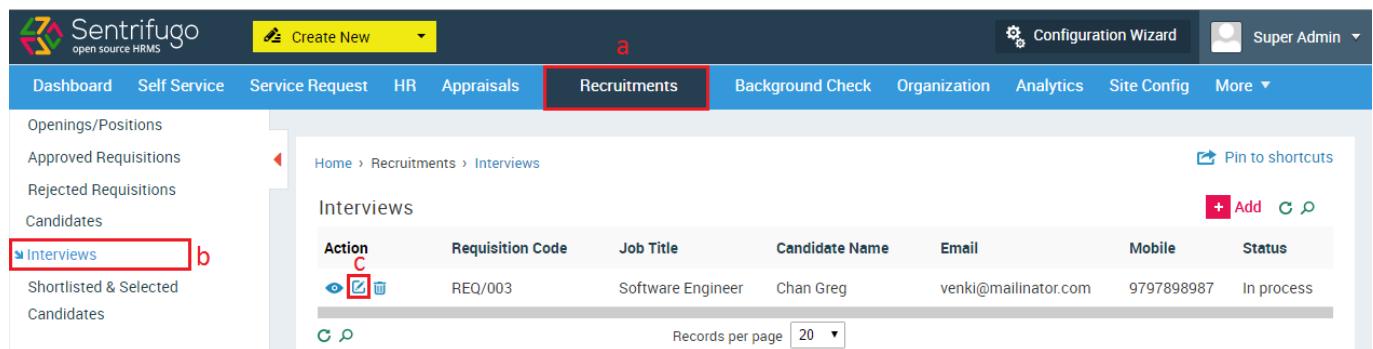
Figure 106

- 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

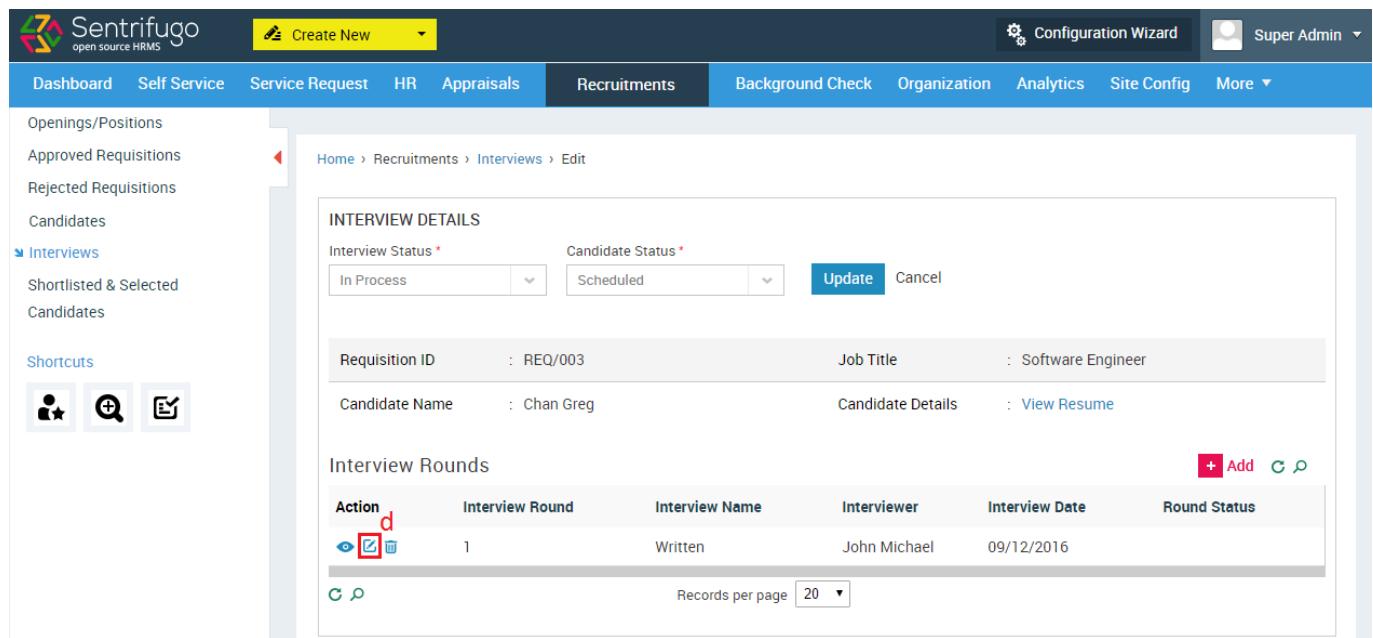


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes a logo, a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. Below the navigation is a blue header bar with menu items: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (which is highlighted with a red box), Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists 'Openings/Positions', 'Approved Requisitions', 'Rejected Requisitions', 'Candidates', 'Interviews' (highlighted with a red box and labeled 'b'), 'Shortlisted & Selected Candidates', and 'Shortcuts' (with icons for users, search, and export). The main content area shows a breadcrumb path: Home > Recruitments > Interviews. It displays a table of interviews with columns: Action, Requisition Code, Job Title, Candidate Name, Email, Mobile, and Status. One row is shown: Action (with edit icon highlighted 'c'), Requisition Code (REQ/003), Job Title (Software Engineer), Candidate Name (Chan Greg), Email (venki@mailinator.com), Mobile (9797898987), and Status (In process). At the bottom are 'Records per page' and a '20' dropdown.

Figure 107

- Click **Recruitments** menu option
- Click **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 and sidebar are identical to Figure 107. The main content area shows a breadcrumb path: Home > Recruitments > Interviews > Edit. It displays 'INTERVIEW DETAILS' with fields for Interview Status (In Process) and Candidate Status (Scheduled), along with 'Update' and 'Cancel' buttons. Below this is a table with columns: Requisition ID, Job Title, Candidate Name, Candidate Details, and a 'View Resume' link. The table shows one row: Requisition ID (REQ/003), Job Title (Software Engineer), Candidate Name (Chan Greg), and Candidate Details (View Resume). At the bottom is a section titled 'Interview Rounds' with a table. The table has columns: Action (with edit icon highlighted 'd'), Interview Round, Interview Name, Interviewer, Interview Date, and Round Status. It shows one round: Interview Round (1), Interview Name (Written), Interviewer (John Michael), Interview Date (09/12/2016), and Round Status (In process). At the bottom are 'Records per page' and a '20' dropdown.

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		
f  Cancel		

Figure 109

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

Please refer Figure 110

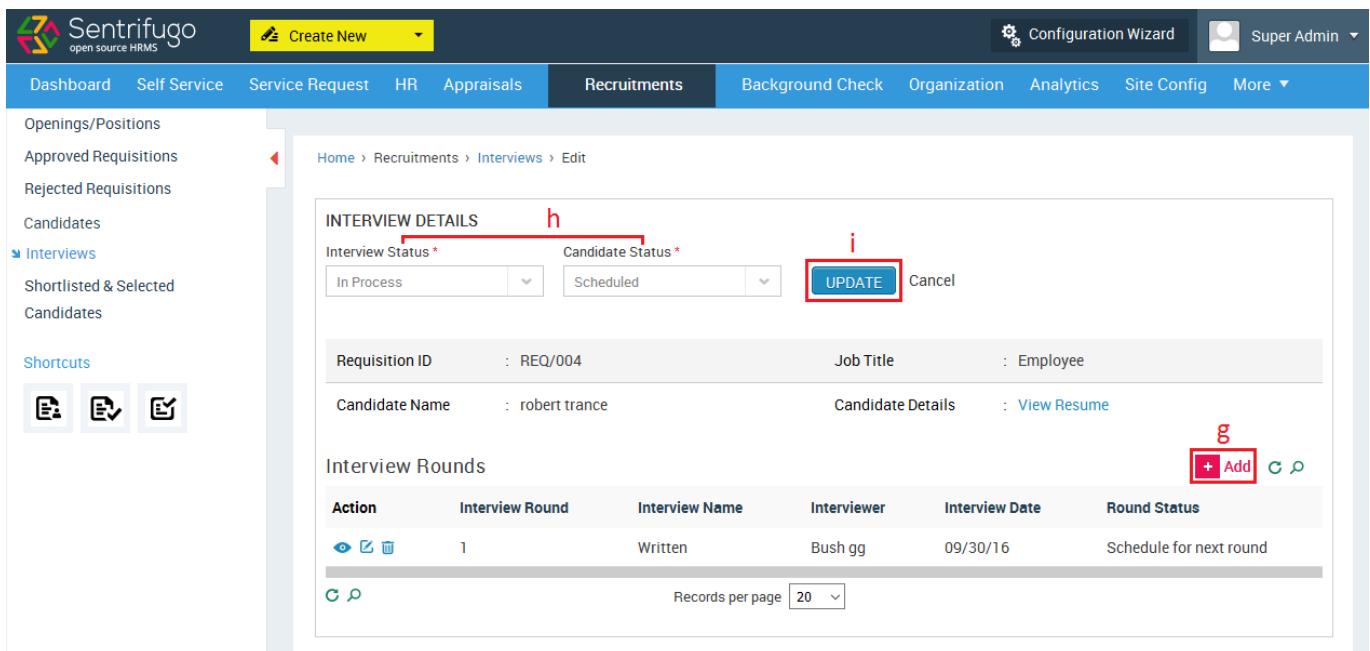


Figure 110

- 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

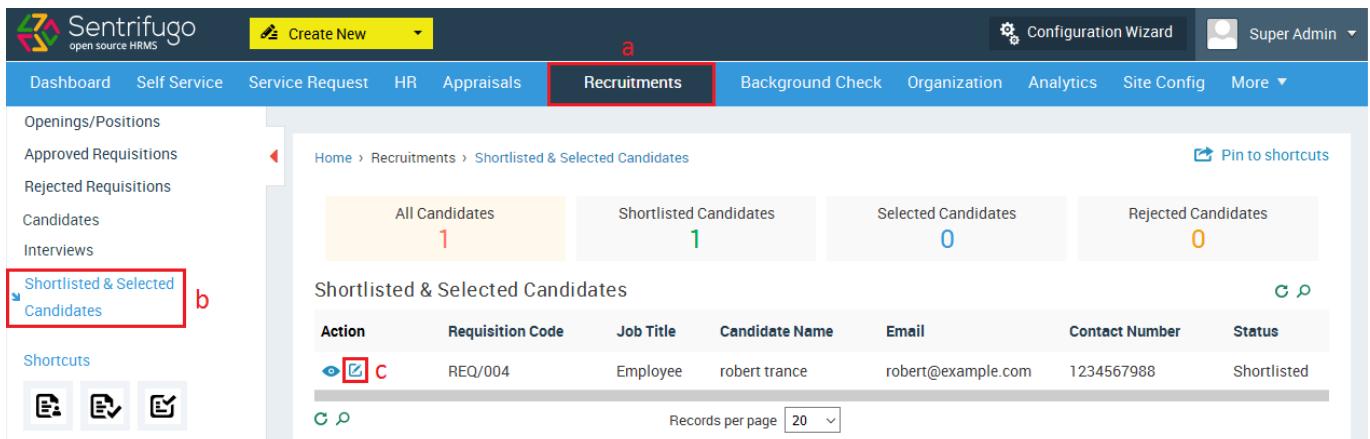
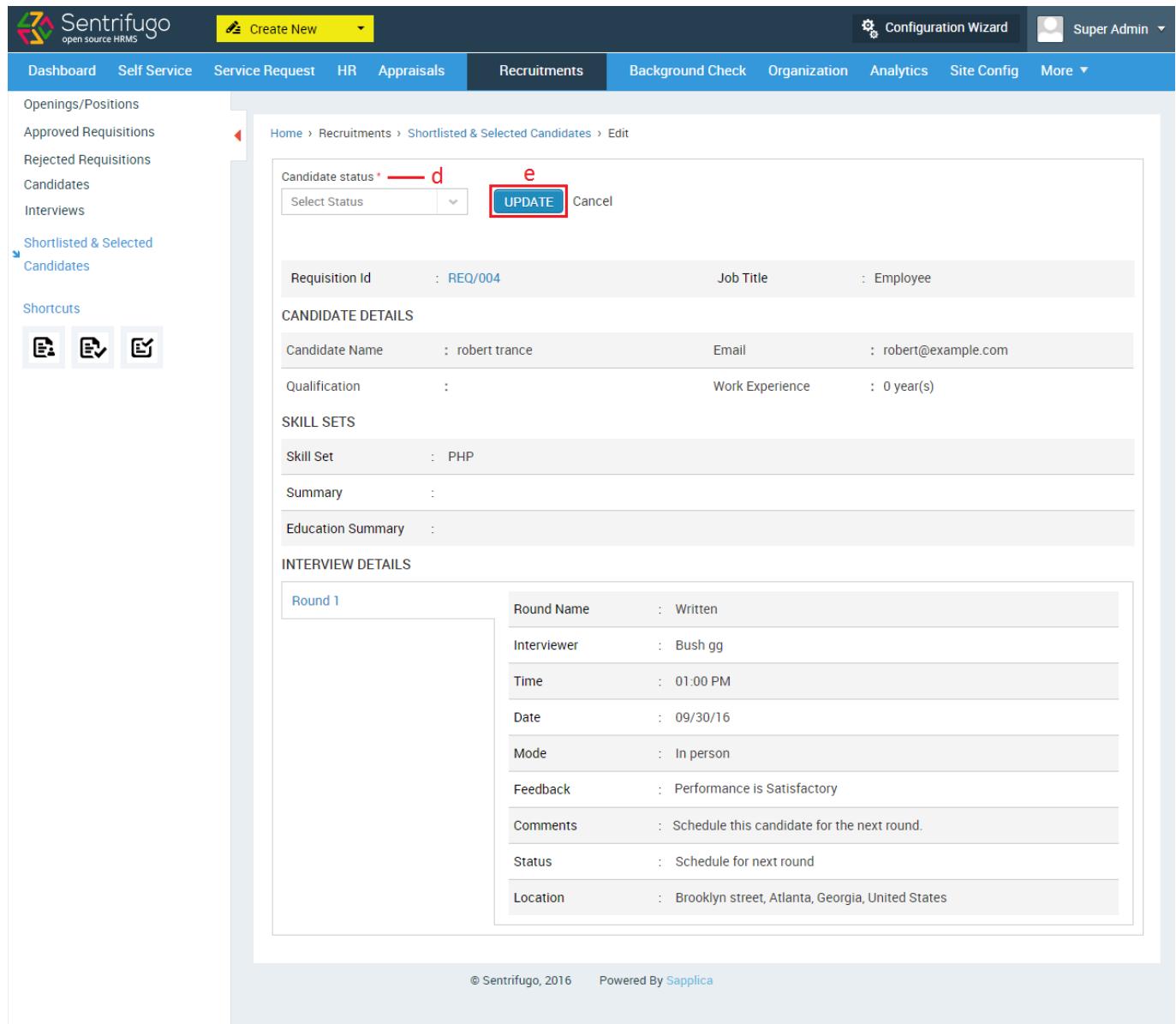


Figure 111

- 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 (which is selected), Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists Openings/Positions, Approved Requisitions, Rejected Requisitions, Candidates, Interviews, and Shortlisted & Selected Candidates (which is expanded). Below the sidebar are three icons: a person, a document, and a gear. The main content area shows a breadcrumb path: Home > Recruitments > Shortlisted & Selected Candidates > Edit. A modal window is open, titled 'Candidate status *'. It contains a dropdown menu labeled 'Select Status' with option 'd' highlighted by a red box. To the right of the dropdown is the 'UPDATE' button, also highlighted by a red box. Below the modal, there are sections for Candidate Details, Skill Sets, and Interview Details. In the Interview Details section, under Round 1, there is a table with the following data:

	:	
Round Name	:	Written
Interviewer	:	Bush gg
Time	:	01:00 PM
Date	:	09/30/16
Mode	:	In person
Feedback	:	Performance is Satisfactory
Comments	:	Schedule this candidate for the next round.
Status	:	Schedule for next round
Location	:	Brooklyn street, Atlanta, Georgia, United States

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

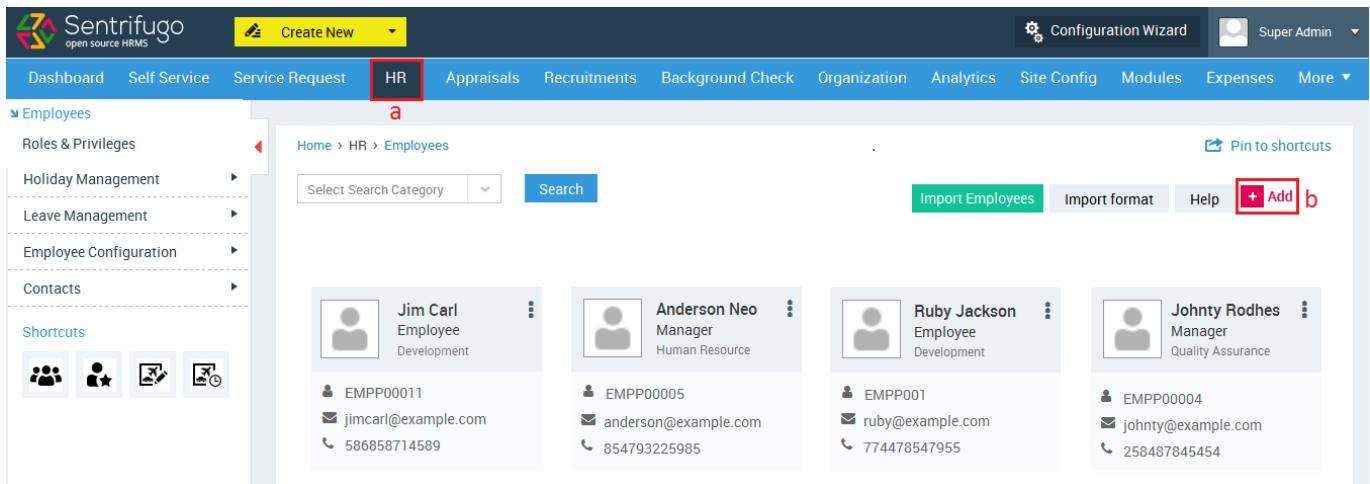
Figure 112

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

7.7 How do I add a Candidate as an Employee?

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

Please refer Figure 113



The screenshot shows the Sentrifugo HR module interface. The top navigation bar includes links for Create New, Configuration Wizard, Super Admin, Dashboard, Self Service, Service Request, HR (which is highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. A sidebar on the left contains sections for Employees (with a red 'a' box), Roles & Privileges, Holiday Management, Leave Management, Employee Configuration, and Contacts. Below this is a section for Shortcuts with four icons. The main content area displays a list of employees under the 'Employees' section. The list includes Jim Carl (Employee Development), Anderson Neo (Manager Human Resource), Ruby Jackson (Employee Development), and Johnty Rodhes (Manager Quality Assurance). Each employee entry shows their name, role, contact information (username, email, phone), and a three-dot menu icon. At the top right of the main content area are buttons for Import Employees, Import format, Help, and a prominent red '+Add' button.

Figure 113

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

Please refer Figure 114

Sentrifugo open source HRMS

Create New ▾ Configuration Wizard Super Admin ▾

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

Employees

- Roles & Privileges
- Holiday Management
- Leave Management
- Employee Configuration
- Contacts

Shortcuts

-
-
-
-

Home > HR > Employees > Add

Official	Employee Code *	Employee Id *	Prefix		
	empp		Select Prefix <input type="button" value="Add Prefix"/>		
Documents	Configure Identity Codes				
Leaves	Candidate Name *	d	Mode of Employment *	C	Requisition code
Holidays	Select Candidate		Interview		
Salary	Role *	Email *	Business Unit		
Personal	Select Role		No Business Unit		
Contact	Department ? *	Reporting Manager *	Job Title		
Skills	Select Department	Select Reporting Manager	Select Job Title		
Job History	Position ?	Employment Status *	Date of Joining ? *		
Experience	Select Position	Select Employment Status	<input type="button" value="Add Employment Status"/>		
Education	Add Position				
Training & Certification	Date of Leaving ?	Years of Experience	Work Telephone Number		
Medical Claims	Extension	Fax			
Disability					
Dependency					
Visa and Immigration					
Corporate Card					
Work Eligibility					
Additional Details					
Pay slips					
Remuneration					
Security Credentials					

f Cancel

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Figure 114

- c. Select '**Interview**' in the field Mode of Employment
- d. The shortlisted candidates' names will be populated here, select a candidate from the drop down list
- e. Enter all the required details
- f. 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 Configuration Wizard Super Admin

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

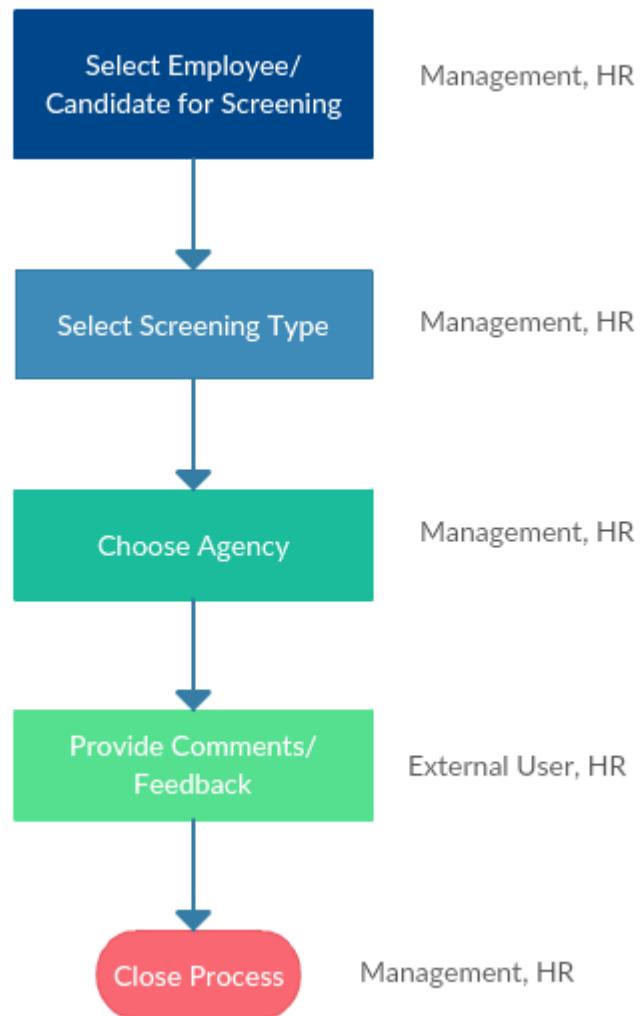
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8. Background Check

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.



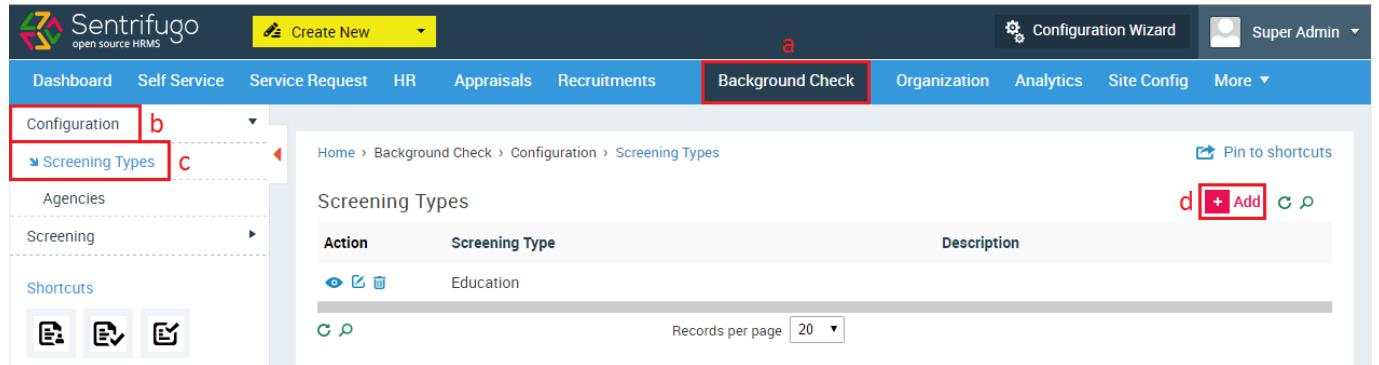
Description:

- 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

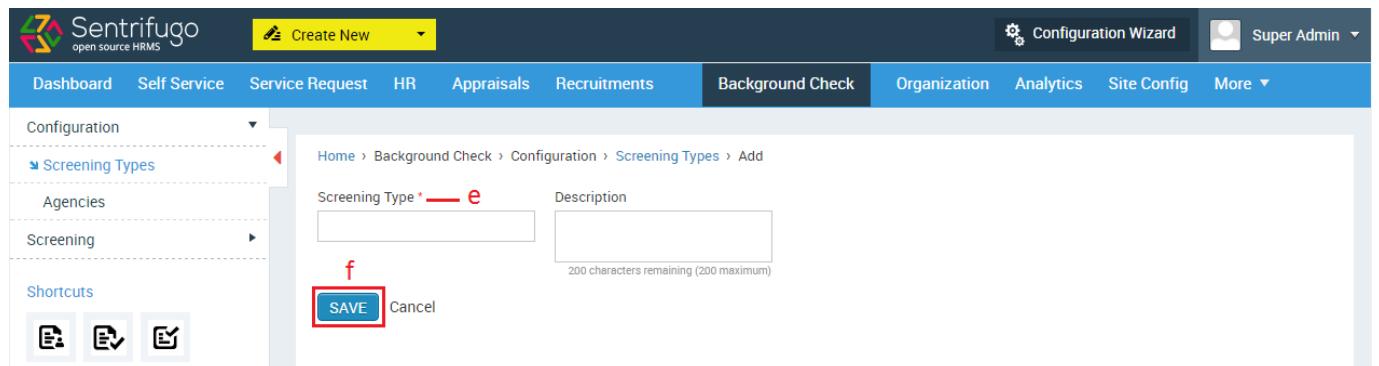


The screenshot shows the Sentrifugo application interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (which is highlighted in red), Organization, Analytics, Site Config, and More. On the far right, there are links for Configuration Wizard, Super Admin, and a user icon. A sidebar on the left contains sections for Configuration (with Screening Types selected, indicated by a red box labeled 'b'), Agencies, Screening, and Shortcuts, along with three small icons. The main content area displays a list titled 'Screening Types' with columns for Action, Screening Type, and Description. One record is listed: 'Education'. At the bottom right of the list area is a red box labeled 'd' containing a '+ Add' button and other icons. The URL in the browser's address bar is 'Home > Background Check > Configuration > Screening Types'.

Figure 115

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

Please refer Figure 116



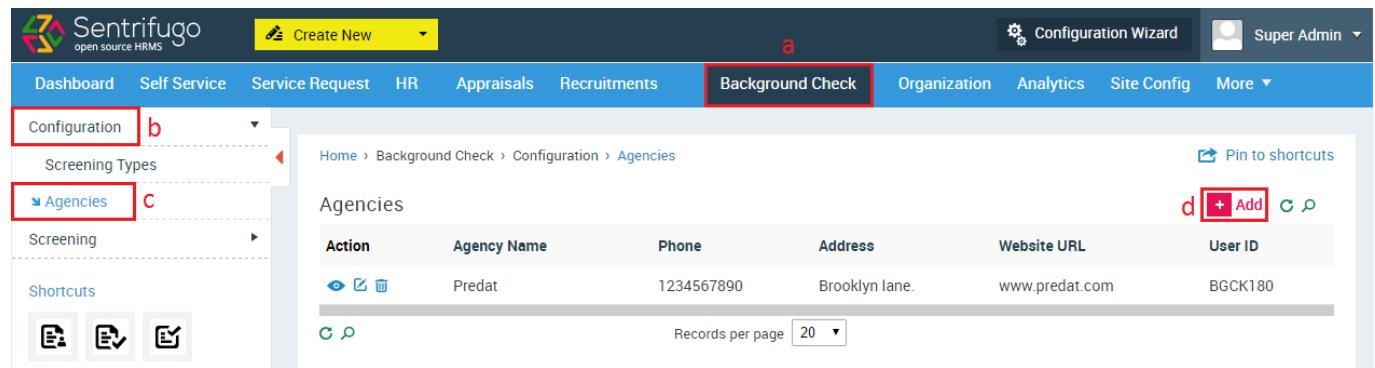
The screenshot shows the 'Add Screening Type' form. The top navigation bar and sidebar are identical to Figure 115. The main content area has a title 'Screening Type *' (labeled 'e') with a red box around it. Below it is a text input field and a description text area with the placeholder '200 characters remaining (200 maximum)'. At the bottom left is a red box labeled 'f' containing a blue 'SAVE' button and a 'Cancel' link. The URL in the browser's address bar is 'Home > Background Check > Configuration > Screening Types > Add'.

Figure 116

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

8.2 How do I add an Agency?

Please refer Figure 117



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. On the far right, there is a 'Super Admin' dropdown menu. 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 are sub-links for 'Screening' and 'Shortcuts'. At the bottom of the sidebar are three small icons. The main content area has a breadcrumb trail: Home > Background Check > Configuration > Agencies. It displays a table titled 'Agencies' with the following data:

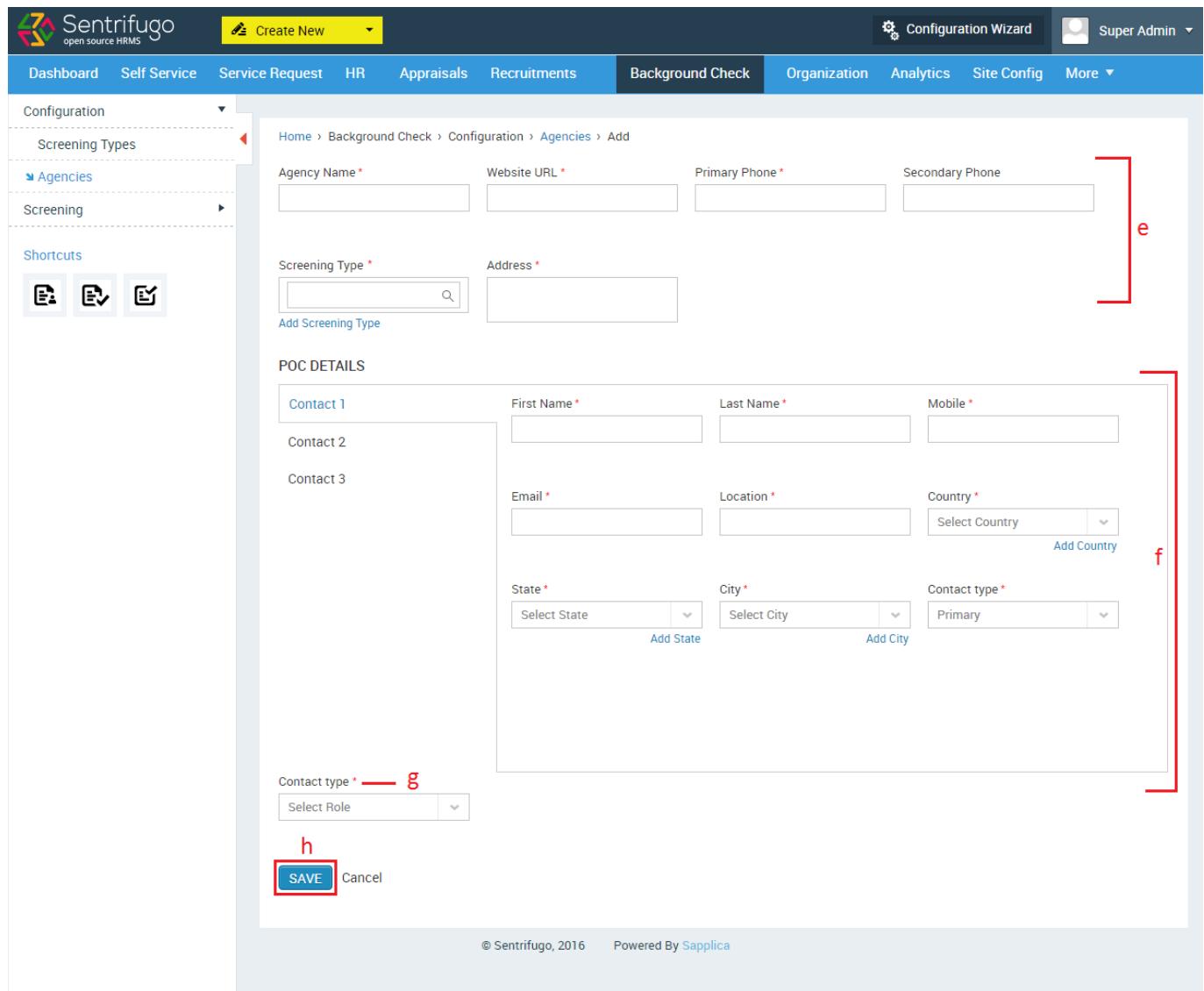
Action	Agency Name	Phone	Address	Website URL	User ID
	Predat	1234567890	Brooklyn lane.	www.predat.com	BGCK180

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

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



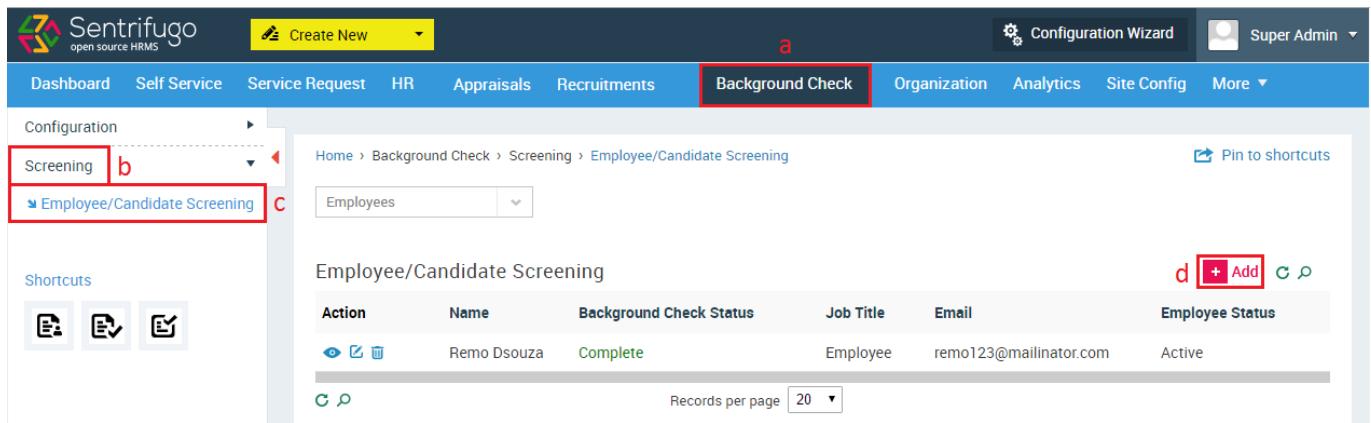
The screenshot shows the Sentrifugo web interface for adding a new agency. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (which is active), Organization, Analytics, Site Config, and More. The left sidebar has sections 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 'POC DETAILS' section with 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.

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

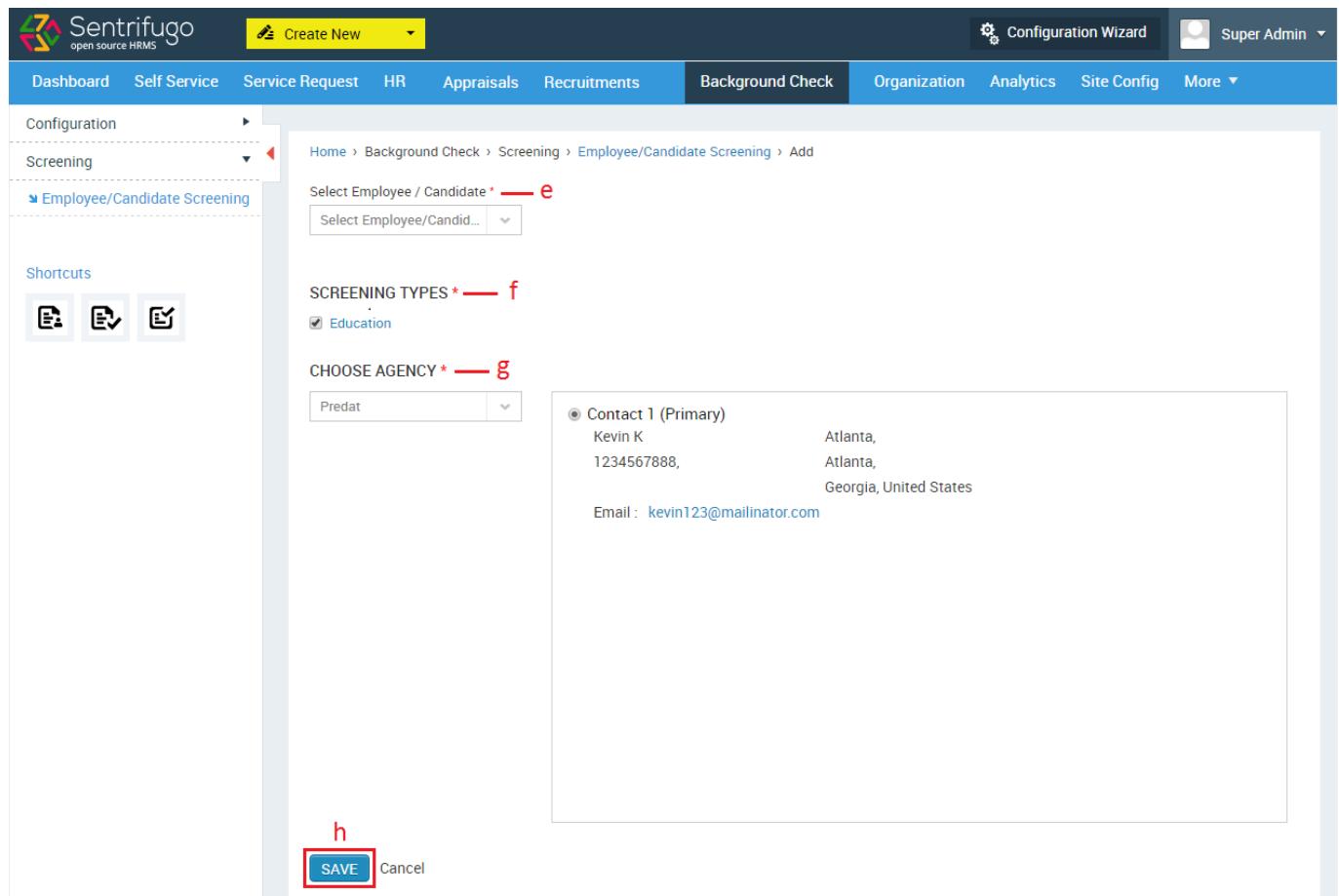


The screenshot shows the Sentrifugo HRMS application interface. The top navigation bar has a 'Create New' button, a 'Configuration Wizard' link, and a 'Super Admin' dropdown. Below the navigation bar, there are several menu items: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, **Background Check** (which is highlighted with a red box), Organization, Analytics, Site Config, and More. On the left side, there is a 'Configuration' panel with a 'Screening' section. Under 'Screening', 'Employee/Candidate Screening' is listed and also highlighted with a red box. The main content area shows a breadcrumb path: Home > Background Check > Screening > Employee/Candidate Screening. There is a 'Pin to shortcuts' link and a search bar labeled 'Employees'. The central part of the screen displays a table titled 'Employee/Candidate Screening' with one row of data. The table columns are: Action, Name, Background Check Status, Job Title, Email, and Employee Status. The data row shows: Action (with icons for eye, edit, delete), Name (Remo Dsouza), Background Check Status (Complete), Job Title (Employee), Email (remo123@mailinator.com), and Employee Status (Active). At the bottom of the table, there is a 'Records per page' dropdown set to 20. On the far right of the table, there is a red box around the '+Add' button.

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

SEARCH

REFRESH

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

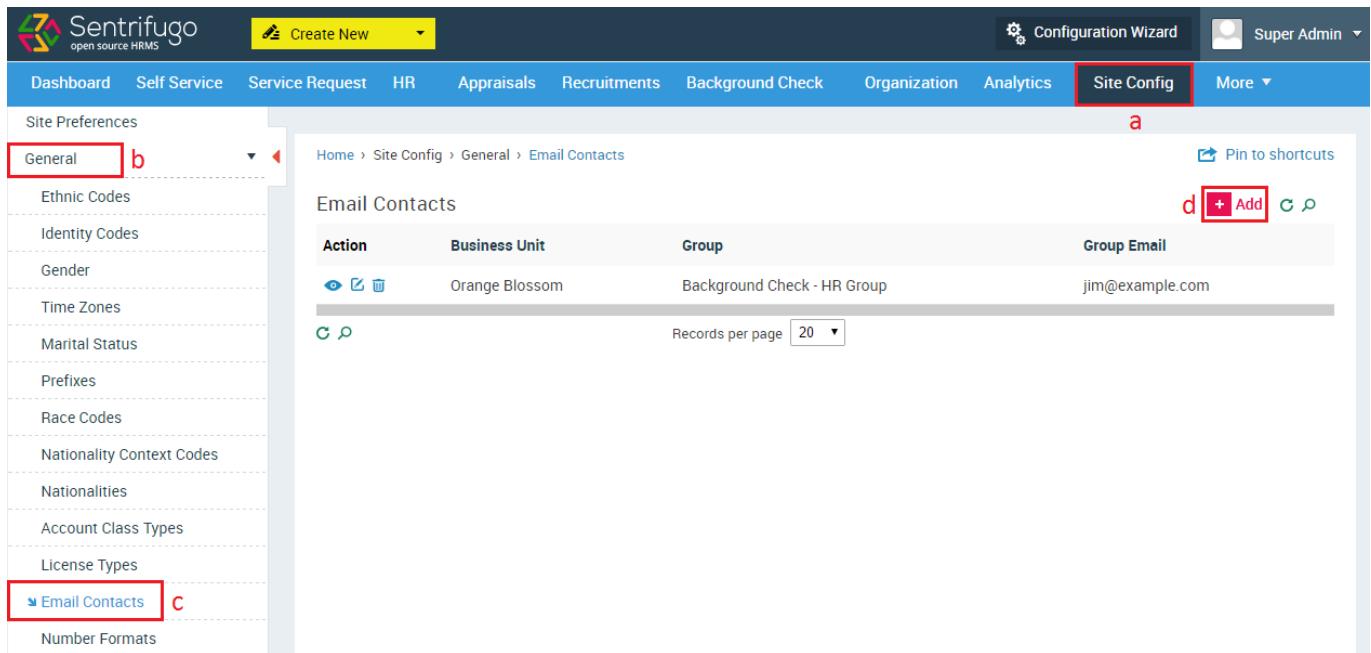
SAVE Cancel

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

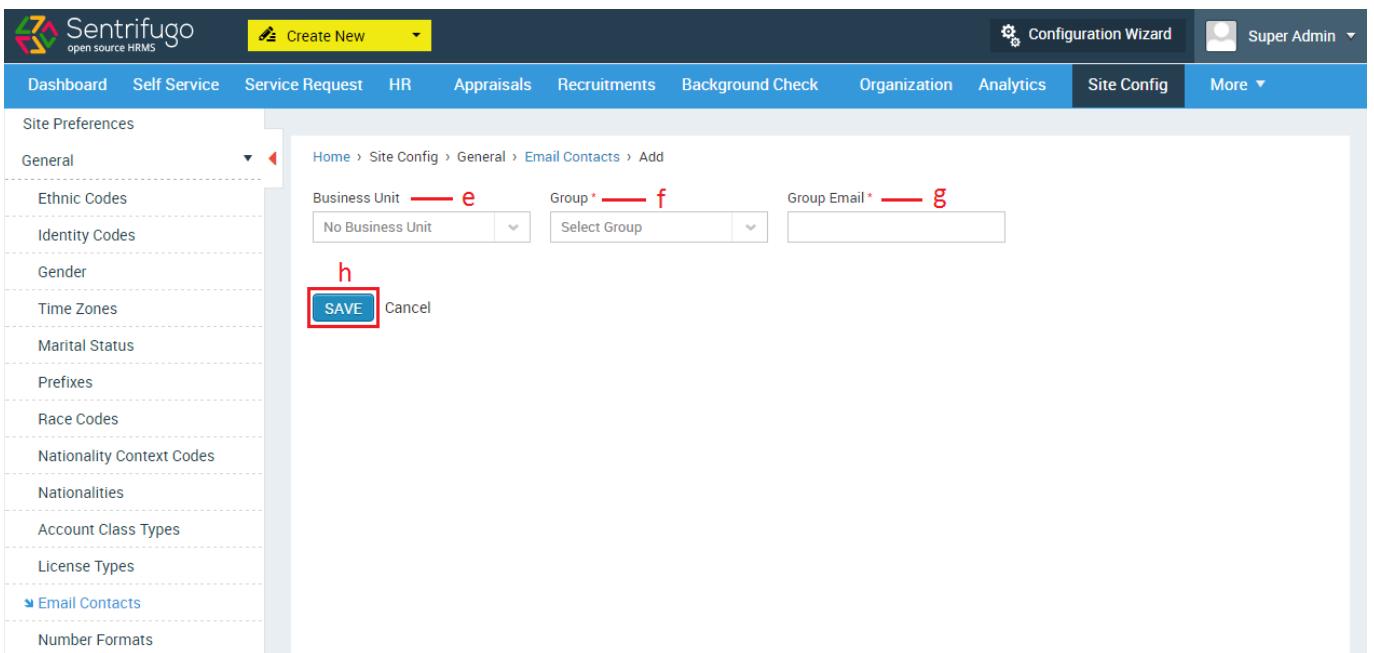


Action	Business Unit	Group	Group Email
	Orange Blossom	Background Check - HR Group	Jim@example.com

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 area shows a breadcrumb path: Home > Site Config > General > Email Contacts > Add. It has fields for Business Unit (set to 'No Business Unit'), Group (set to 'Select Group'), and Group Email (empty). A red box highlights the 'SAVE' button at the bottom-left of the form.

Figure 122

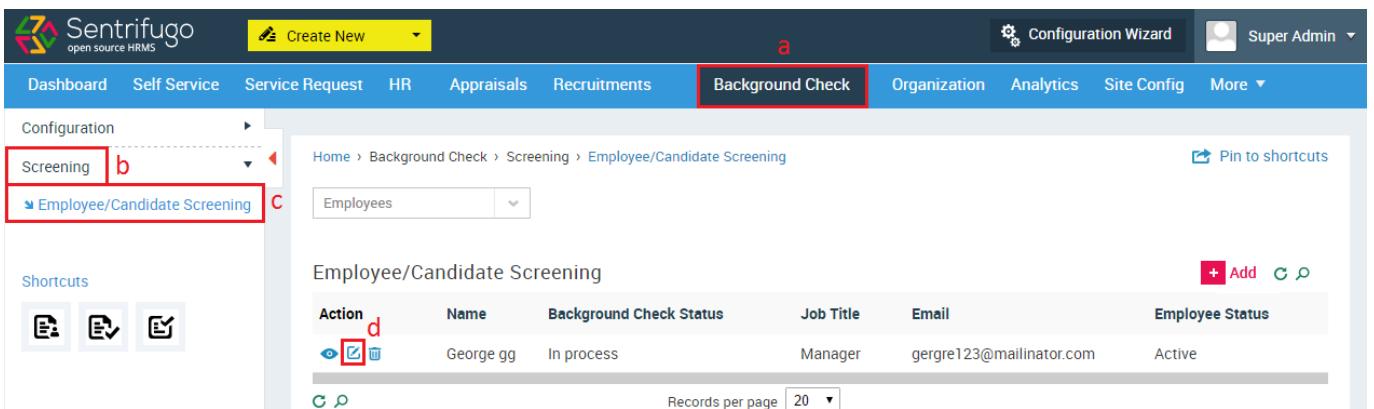
- e. Select the business unit the HR group
- f. Select 'Background Check – HR Group' (HR)/ 'Background Check' Management Group (Management)
- g. Enter group email id
- h. Click **SAVE** button



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

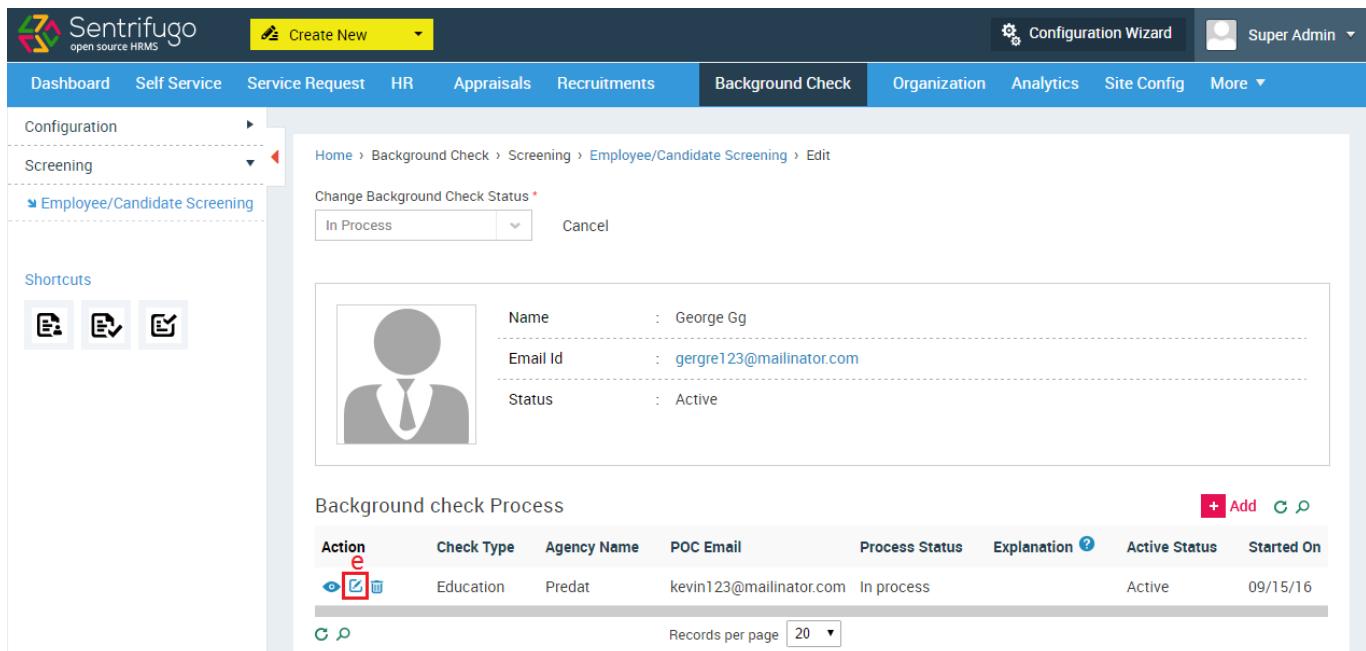


The screenshot shows the Sentrifugo interface for managing employee/candidate screening. The top navigation bar has 'Background Check' selected. The left sidebar has 'Screening' selected, and under it, 'Employee/Candidate Screening' is highlighted with a red box and labeled 'c'. The main content area shows a table titled 'Employee/Candidate Screening' with one row of data. The table columns are: Action (with edit icon), Name, Background Check Status, Job Title, Email, and Employee Status. The data in the table is: Action (edit icon), Name (George gg), Background Check Status (In process), Job Title (Manager), Email (gergre123@mailinator.com), and Employee Status (Active). A red box highlights the edit icon in the Action column, labeled 'd'.

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), Organization, Analytics, Site Config, and More. A 'Create New' button and a 'Configuration Wizard' link are also present. On the far right, there's a 'Super Admin' dropdown.

The left sidebar has sections for Configuration, Screening, and Employee/Candidate Screening, with the latter being the active tab. Under 'Employee/Candidate Screening', there are three icons: a person icon, a magnifying glass icon, and a document icon.

The main content area shows a 'Change Background Check Status' dialog box with a dropdown set to 'In Process' and a 'Cancel' button. Below this, a card displays details for a candidate: Name (George Gg), Email Id (gerge123@mailinator.com), and Status (Active). To the left of this card is a placeholder image of a person wearing a suit and tie.

At the bottom, a table titled 'Background check Process' is displayed. It has columns for Action, Check Type, Agency Name, POC Email, Process Status, Explanation, Active Status, and Started On. One row is visible, showing an action icon with a red border, 'Education' as the check type, 'Predat' as the agency name, 'kevin123@mailinator.com' as the POC email, 'In process' as the status, 'Active' as the explanation, and '09/15/16' as the started date. The table includes a header with 'Add' and search/filter icons, and a footer with 'Records per page' set to 20.

Figure 124

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

Please refer Figure 125

Background check Process

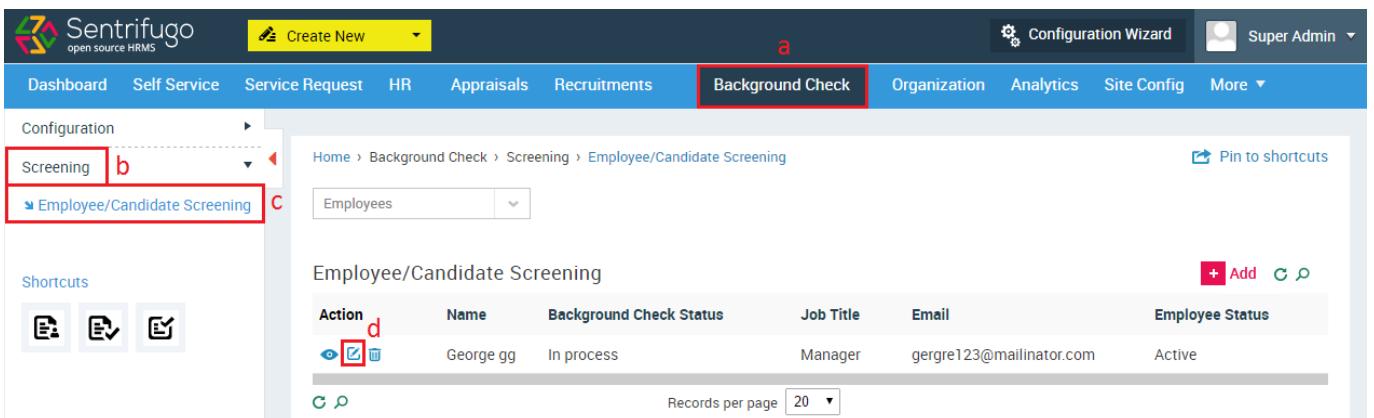
Change Background Check Status *	In Process	UPLOAD FEEDBACK DOCUMENT ? — f
		Upload Feedback File
		SAVE g
AGENCY & POC DETAILS		ENTER COMMENTS / FEEDBACK — h
Check Type	: Education	
Agency Name	: Predat	
Contact Person Name	Kevin K	
Contact Number	: 1234567888	
Email	: kevin123@mailinator.com	
Address	: Atlanta, Atlanta, Georgia, United States	
CLOSE		
<div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> POST i No comments posted </div>		

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

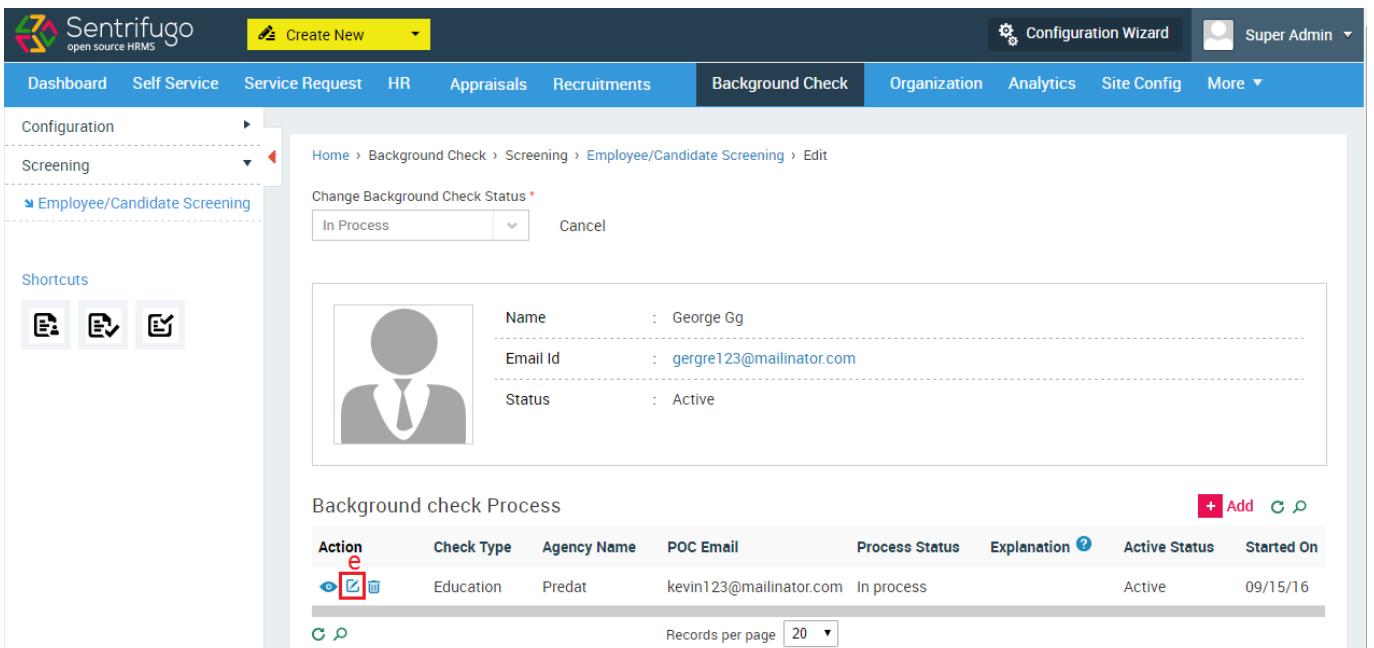


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Configuration Wizard', 'Super Admin', and links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (highlighted with a red box), Organization, Analytics, Site Config, and More. The left sidebar has a 'Configuration' section with 'Screening' selected, which further branches into 'Employee/Candidate Screening' (also highlighted with a red box). The main content area displays the 'Employee/Candidate Screening' page with a table showing one record: George Gg (Name), In process (Background Check Status), Manager (Job Title), gergre123@mailinator.com (Email), and Active (Employee Status). The table includes columns for Action (with an edit icon highlighted with a red box), Name, Background Check Status, Job Title, Email, and Employee Status. There are also 'Add', 'Search', and 'Records per page' dropdown controls.

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', 'Super Admin', and links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (selected), Organization, Analytics, Site Config, and More. The left sidebar has a 'Configuration' section with 'Employee/Candidate Screening' selected. The main content area displays the 'Employee/Candidate Screening' page with a form to change the 'Background Check Status' to 'In Process'. It also shows a summary card for George Gg with details: Name (George Gg), Email Id (gergre123@mailinator.com), and Status (Active). Below this is a 'Background check Process' grid with one row: Education (Check Type), Predat (Agency Name), kevin123@mailinator.com (POC Email), In process (Process Status), Active (Explanation), and 09/15/16 (Started On). The grid includes columns for Action (with an edit icon highlighted with a red box), Check Type, Agency Name, POC Email, Process Status, Explanation, Active Status, and Started On. There are also 'Add', 'Search', and 'Records per page' dropdown controls.

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

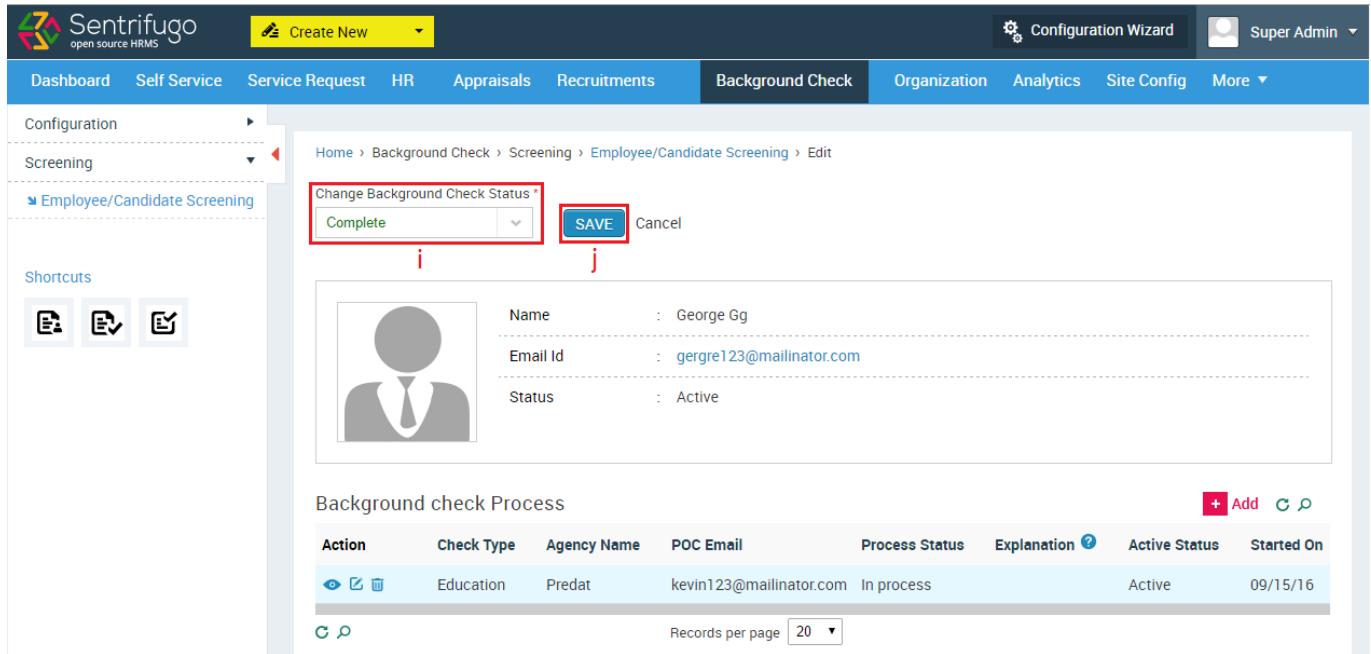
POST

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 (which is highlighted in blue), 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 has a red border. To the right of the dropdown is a blue "SAVE" button, also with a red border. A small letter "i" is positioned below the dropdown, and a small letter "j" is positioned below the "SAVE" button.

Below the form, there is a section titled "Background check Process" with a table. The table has columns for Action, Check Type, Agency Name, POC Email, Process Status, Explanation, Active Status, and Started On. One row in the table is highlighted in blue and shows the following data:

Action	Check Type	Agency Name	POC Email	Process Status	Explanation	Active Status	Started On
	Education	Predat	kevin123@mailinator.com	In process		Active	09/15/16

At the bottom left of the table, there are "Add" and "Search" buttons. At the bottom right, there is a "Records per page" dropdown set to 20.

Figure 130

To close all Background processes for an employee:

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

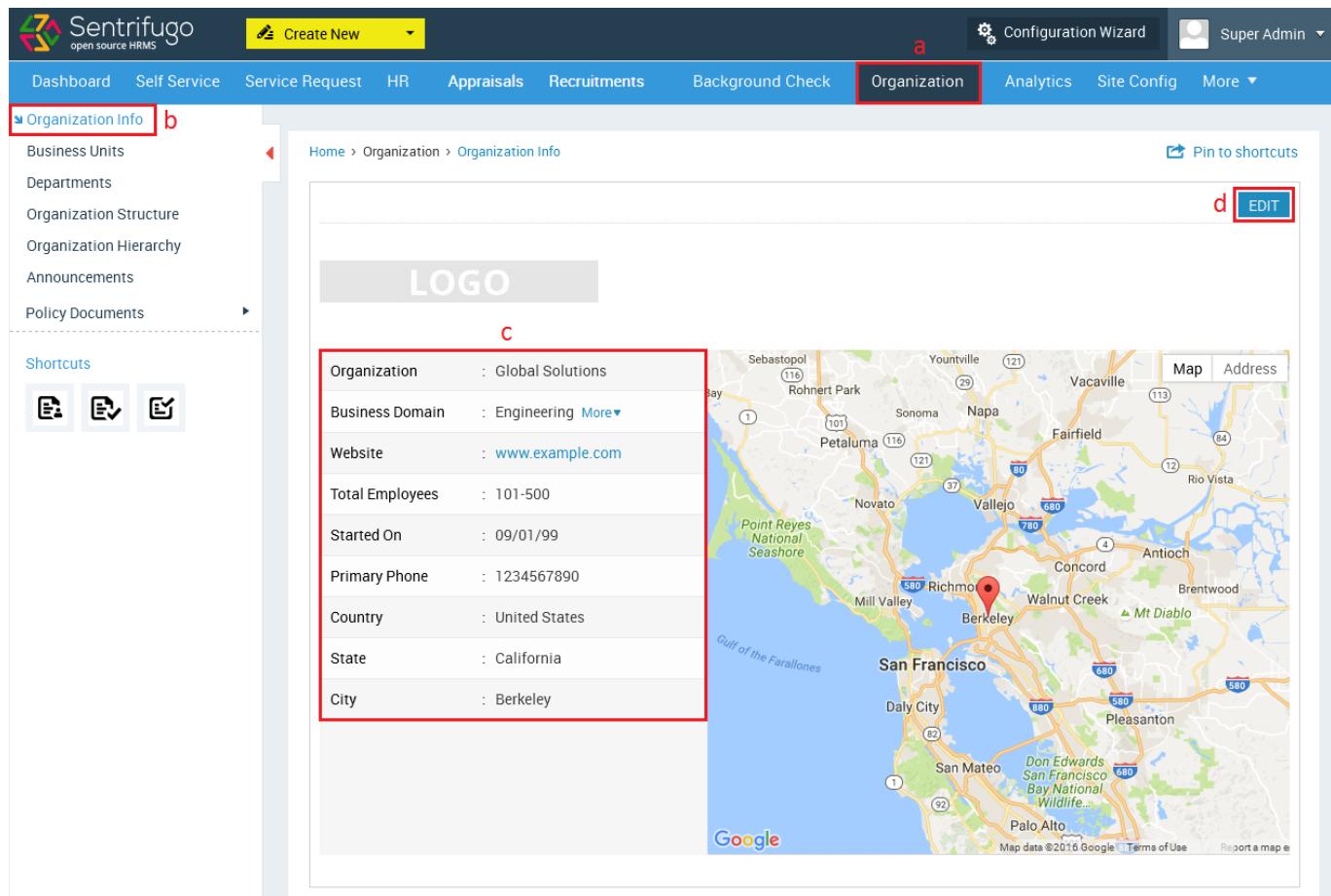
9. Organization

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

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

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

Please refer Figure 131

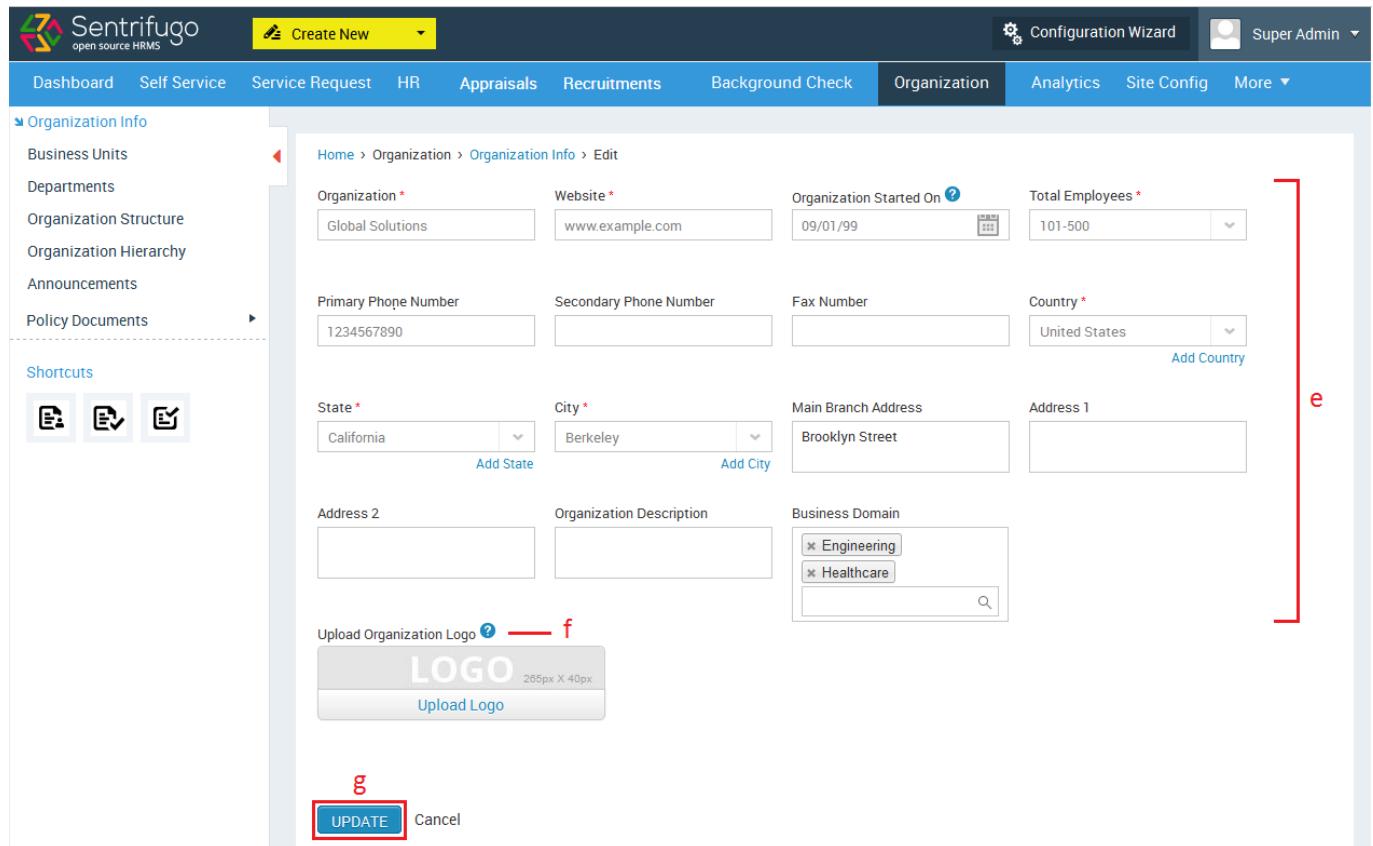


The screenshot shows the Sentrifugo application interface. At the top, there's a navigation bar with links for Create New, Configuration Wizard, Super Admin, and various modules like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization (which is highlighted with a red box 'a'), Analytics, Site Config, and More. On the left, a sidebar has a 'Organization Info' section (highlighted with a red box 'b') containing links for Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, and Policy Documents. Below this is a 'Shortcuts' section with three icons. 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 'c'): Organization: Global Solutions, Business Domain: Engineering, 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 pin marking Berkeley. At the bottom right of the map is a 'Google' logo. A red box 'd' highlights the 'EDIT' button in the top right corner of the main content area.

Figure 131

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

Please refer Figure 132



The screenshot shows the 'Organization Info' edit page in the Sentrifugo 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 lists Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, and Policy Documents under 'Organization Info'. 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, and Business Domain (Engineering, Healthcare). An 'Upload Organization Logo' section allows for a 285px X 40px logo to be uploaded. 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

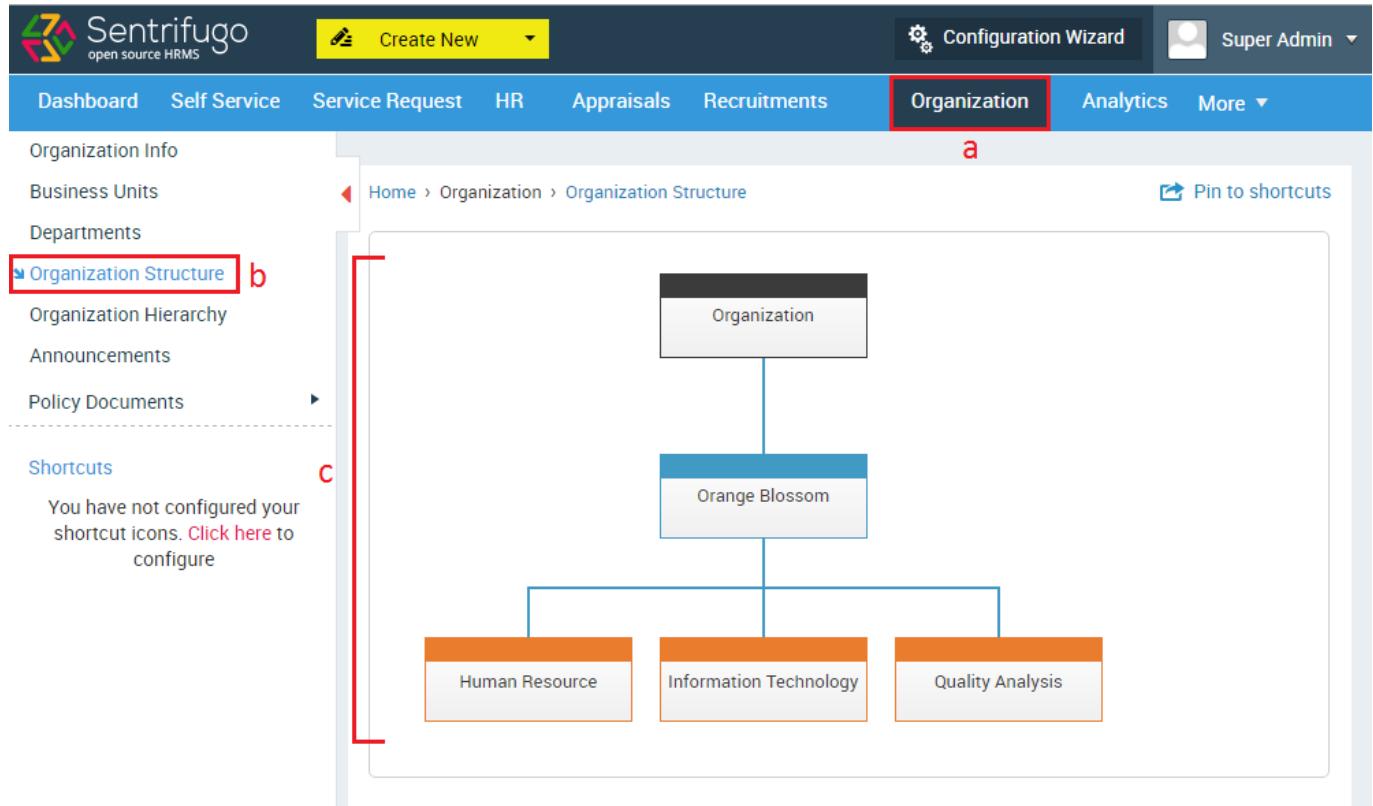


Figure 133

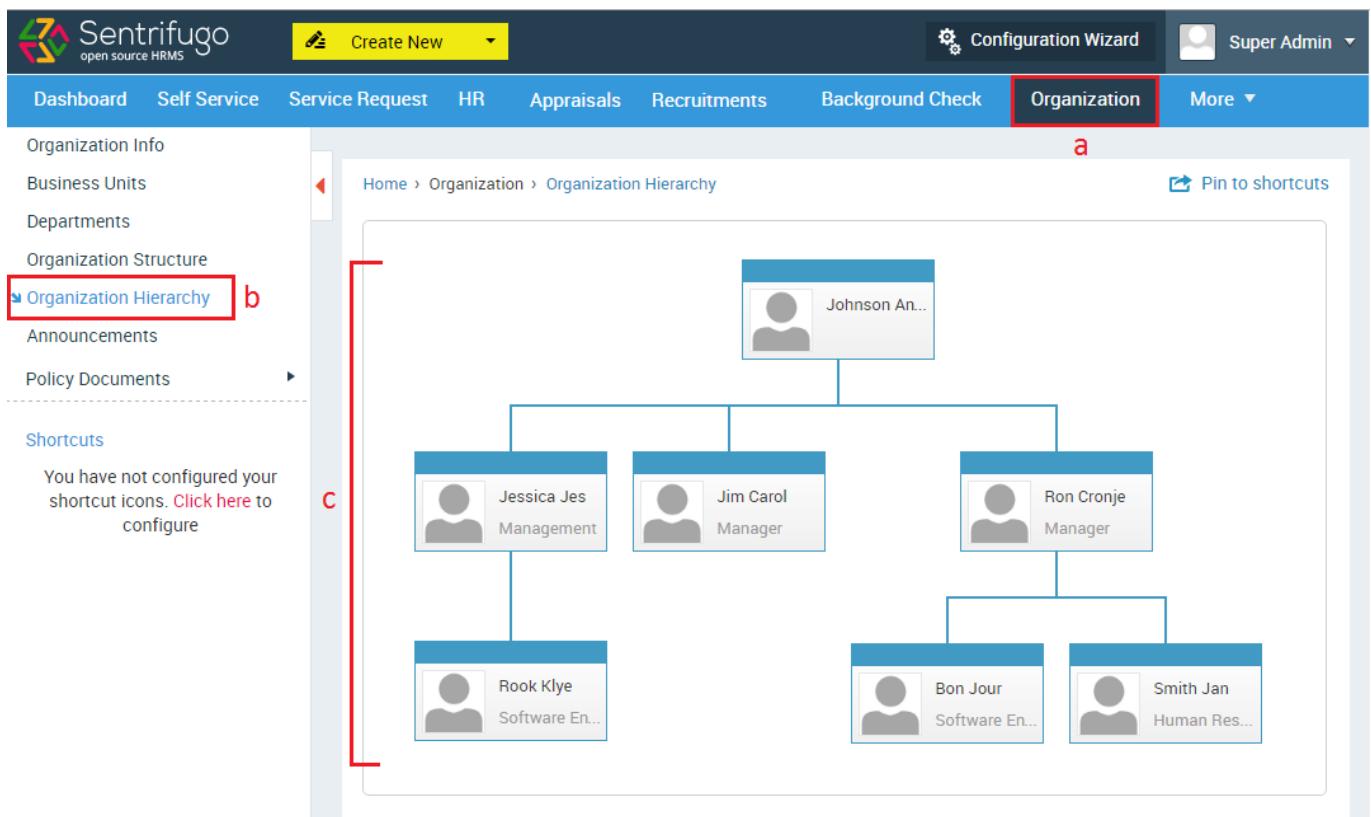
- Click **Organization** in the top menu
- Click **Organization Structure** on the left side panel
- Your Organization Structure will be displayed here



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



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

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

Home > Organization > Organization Hierarchy

Johnson An...

Jessica Jes Management

Jim Carol Manager

Ron Cronje Manager

Rook Klye Software En...

Bon Jour Software En...

Smith Jan Human Res...

Pin to shortcuts

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

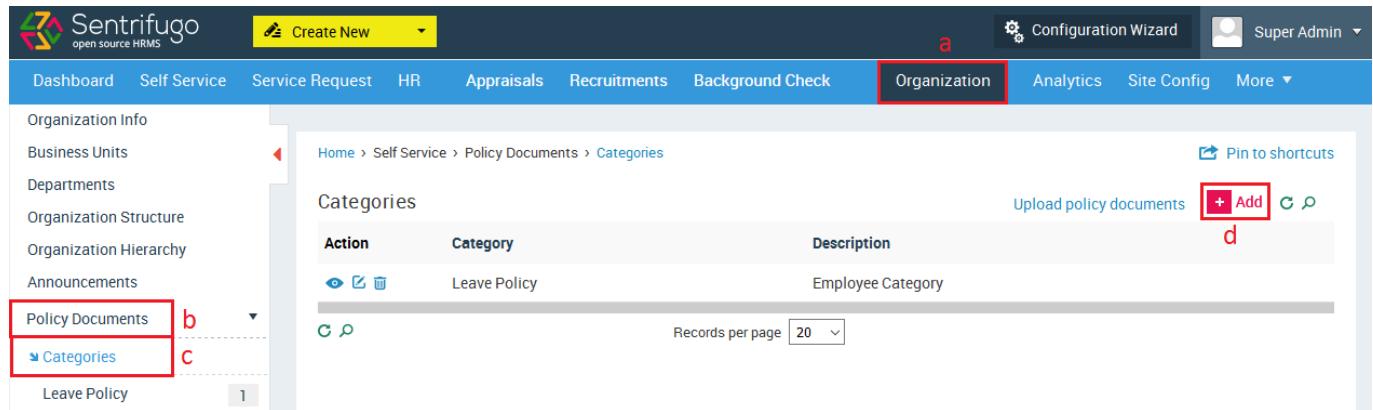


Figure 135

- 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

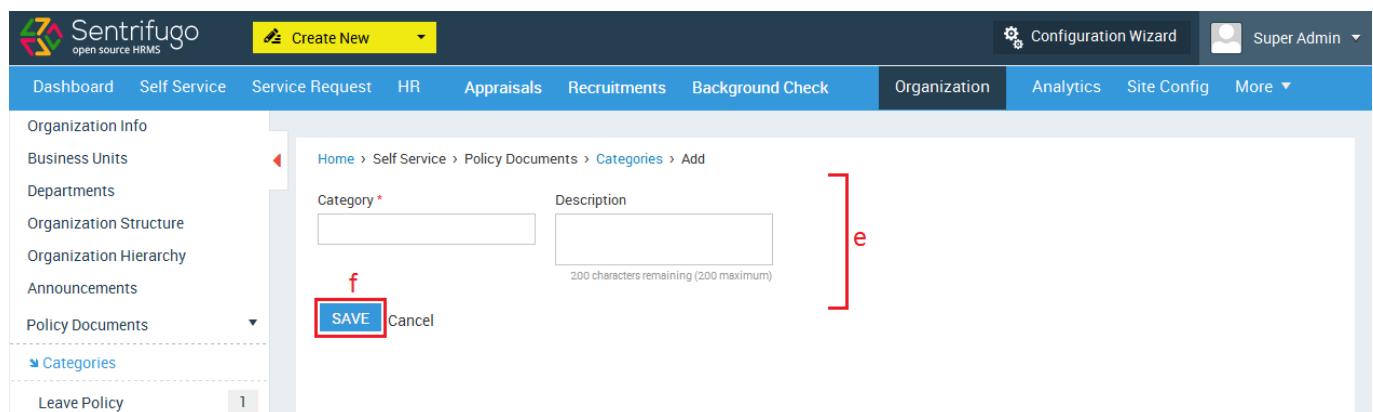
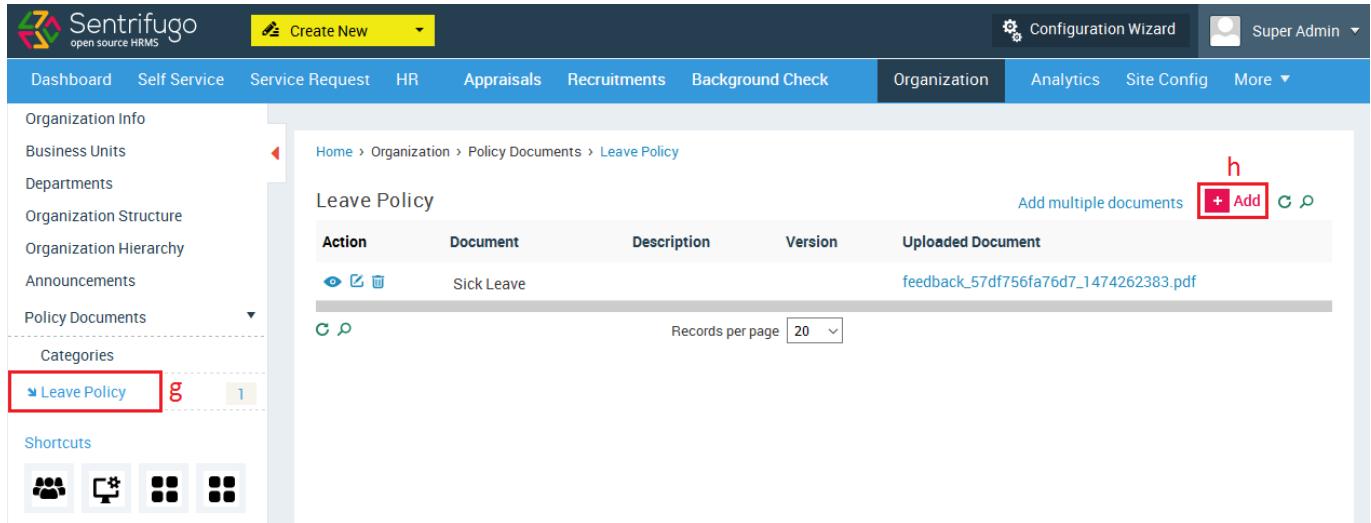


Figure 136

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

Please refer Figure 137

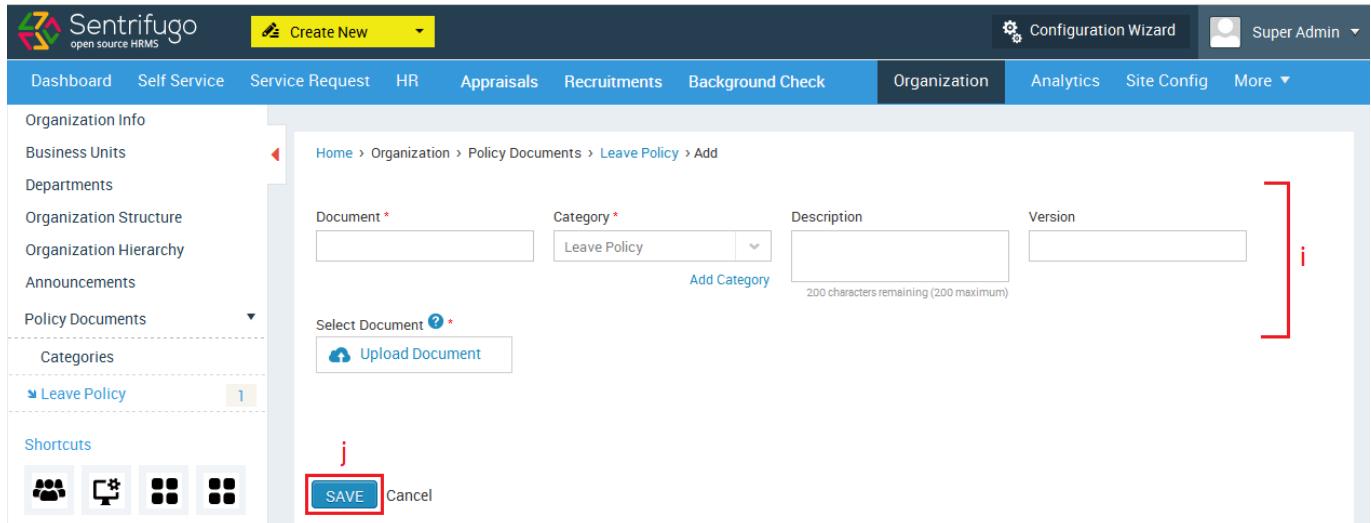


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization (selected), Analytics, Site Config, and More. On the left, a sidebar lists Organization Info, Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, Policy Documents (selected), and Categories. Under Categories, 'Leave Policy' is selected, indicated by a red box labeled 'g'. The main content area displays a table titled 'Leave Policy' with columns for Action, Document, Description, Version, and Uploaded Document. One record is listed: 'Sick Leave' with the file 'feedback_57df756fa76d7_1474262383.pdf'. Below the table are 'Records per page' dropdown and search/filter icons. The top right features a 'Configuration Wizard' and 'Super Admin' dropdown.

Figure 137

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

Please refer Figure 138



The screenshot shows the 'Leave Policy' add form. The top navigation bar and sidebar are identical to Figure 137. The main form has fields for 'Document' (with a required asterisk), 'Category' (set to 'Leave Policy'), 'Description' (with a note of '200 characters remaining (200 maximum)'), and 'Version'. Below these is a 'Select Document' section with an 'Upload Document' button. At the bottom are 'SAVE' and 'Cancel' buttons, with 'SAVE' highlighted by a red box labeled 'j'.

Figure 138

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

9.6 How do I view Policy Documents?

Please refer Figure 139

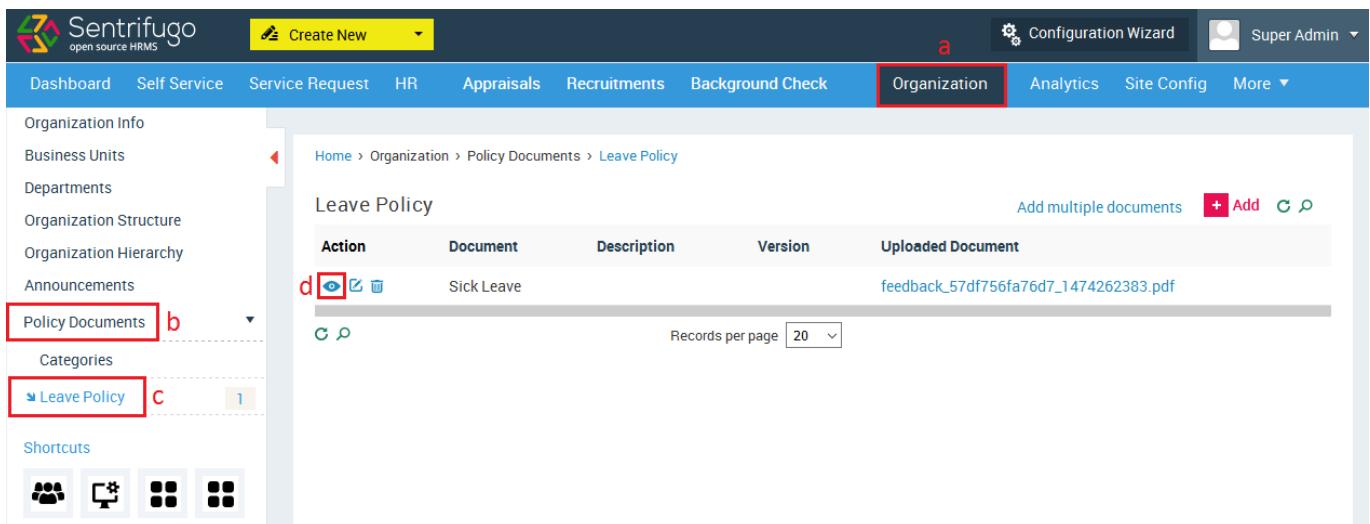


Figure 139

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



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

10. Analytics

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

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

10.1 How do I view/generate Reports?

Please refer Figure 140

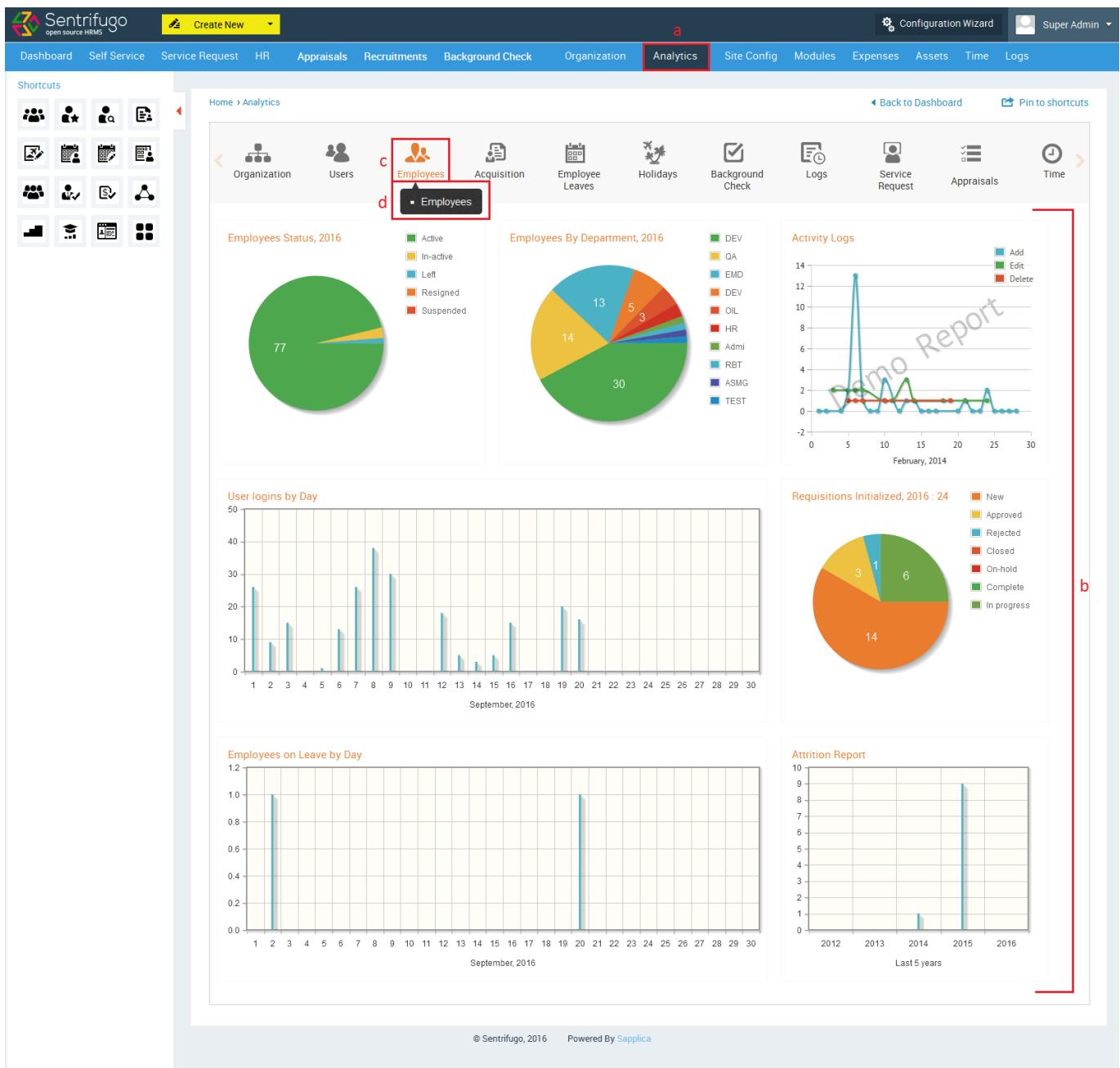
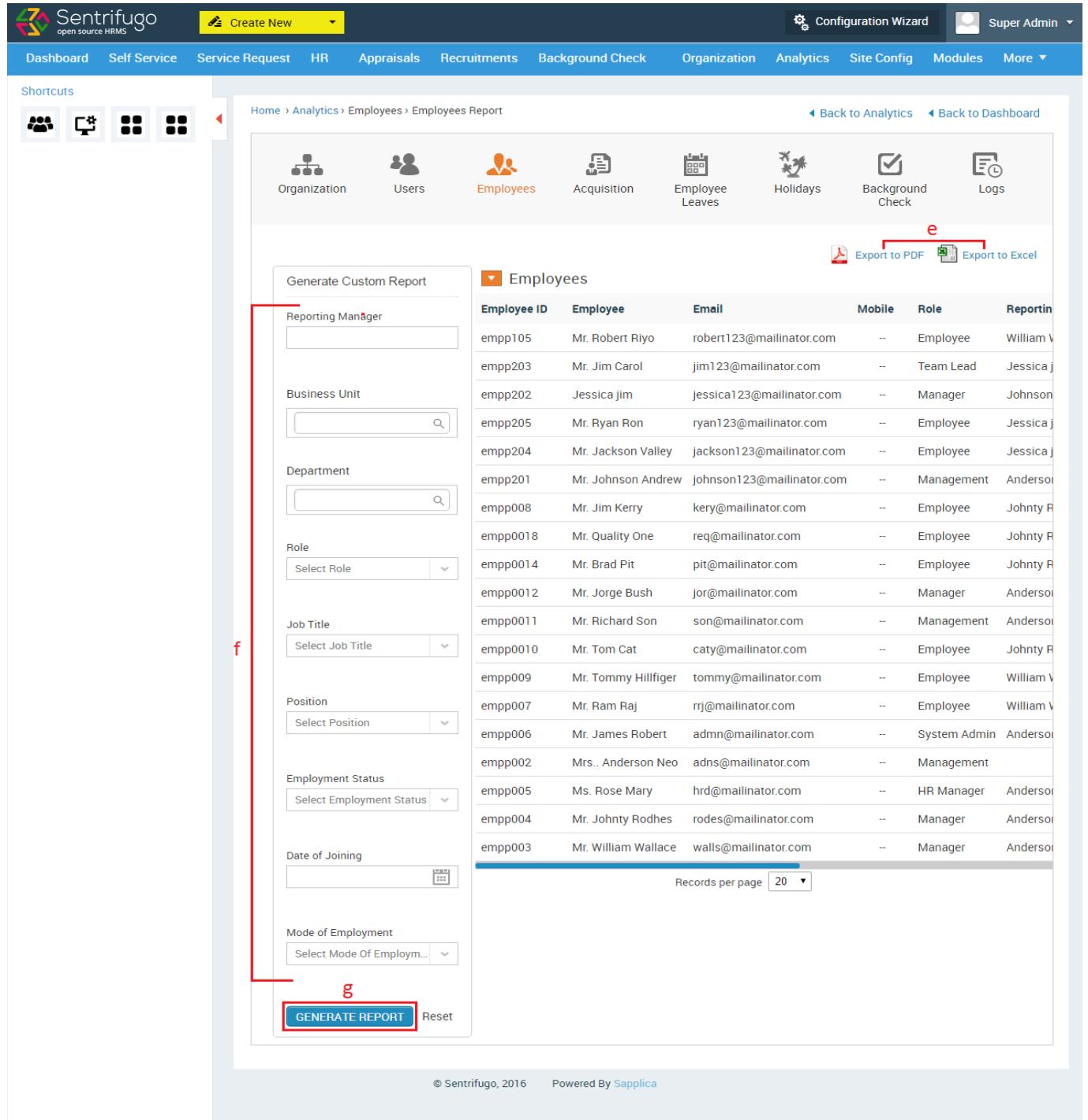


Figure 140

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

Please refer Figure 141



The screenshot shows the Sentrifugo HRMS 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 bar is a 'Shortcuts' section with icons for Organization, Users, Employees (highlighted in orange), Acquisition, Employee Leaves, Holidays, Background Check, and Logs.

The main content area is titled 'Employees' and displays a table of employee data. The columns include Employee ID, Employee, Email, Mobile, Role, and Reporting. There are 20 records listed. At the bottom of the table, there's a 'Records per page' dropdown set to 20.

On the left side, there's a 'Generate Custom Report' sidebar with various filters: Reporting Manager, Business Unit, Department, Role, Job Title, Position, Employment Status, Date of Joining, and Mode of Employment. Each filter has a dropdown or input field and a 'Select' button.

At the bottom of the sidebar, there are two buttons: 'GENERATE REPORT' (highlighted with a red box) and 'Reset'. Above the table, there are two export options: 'Export to PDF' (red bracket 'e') and 'Export to Excel'.

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

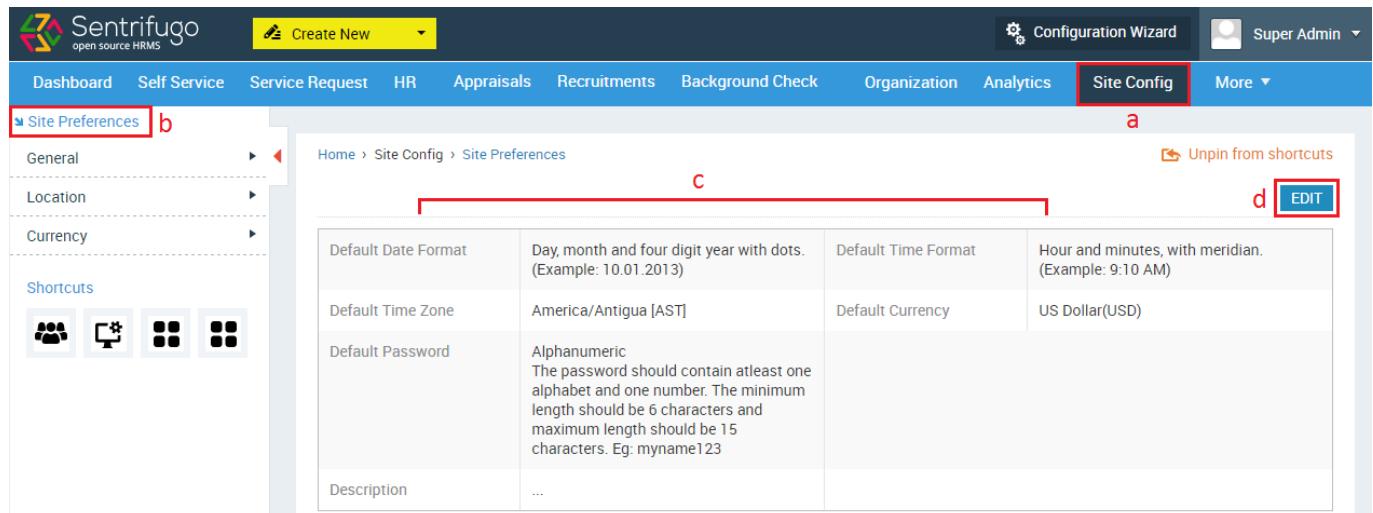
11. Site Config

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

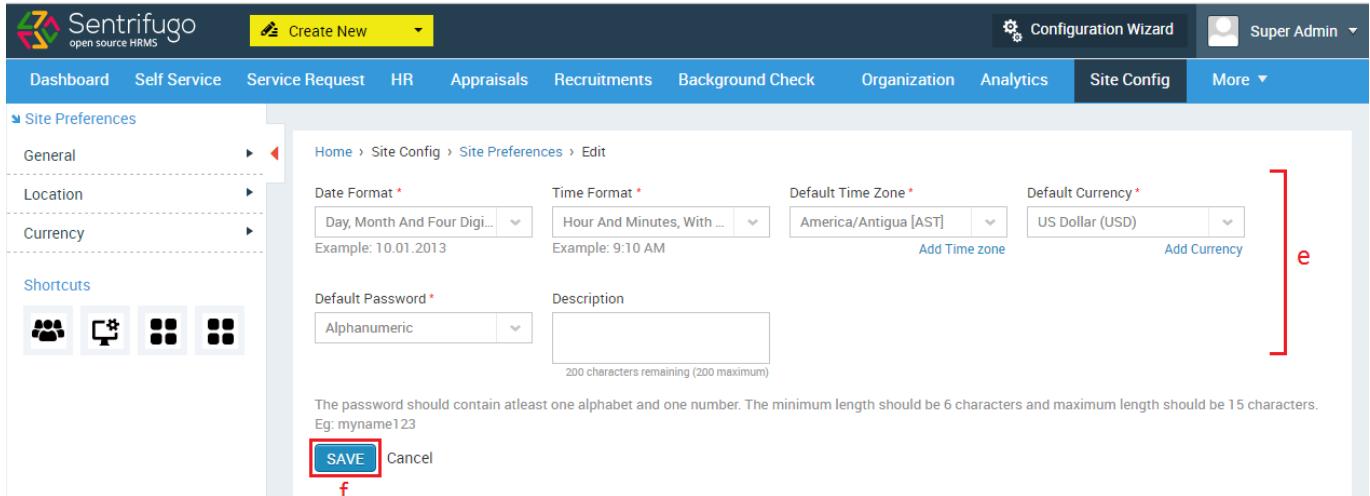


Default Date Format	Day, month and four digit year with dots. (Example: 10.01.2013)	Default Time Format	Hour and minutes, with meridian. (Example: 9:10 AM)
Default Time Zone	America/Antigua [AST]	Default Currency	US Dollar(USD)
Default Password	Alphanumeric The password should contain atleast one alphabet 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 Sentrifugo application 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 selected), and More. On the far right, there are Configuration Wizard and Super Admin options. Below the navigation bar, the main content area is titled 'Site Preferences'. It has a sidebar with sections for General, Location, and Currency, and a 'Shortcuts' section with four icons. The main content area shows fields for 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)'). There are 'Add Time zone' and 'Add Currency' buttons. Below these fields, there are sections for 'Default Password' (set to 'Alphanumeric') and 'Description' (with a note about character limits). A note at the bottom says: '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 of the form are 'SAVE' and 'Cancel' buttons.

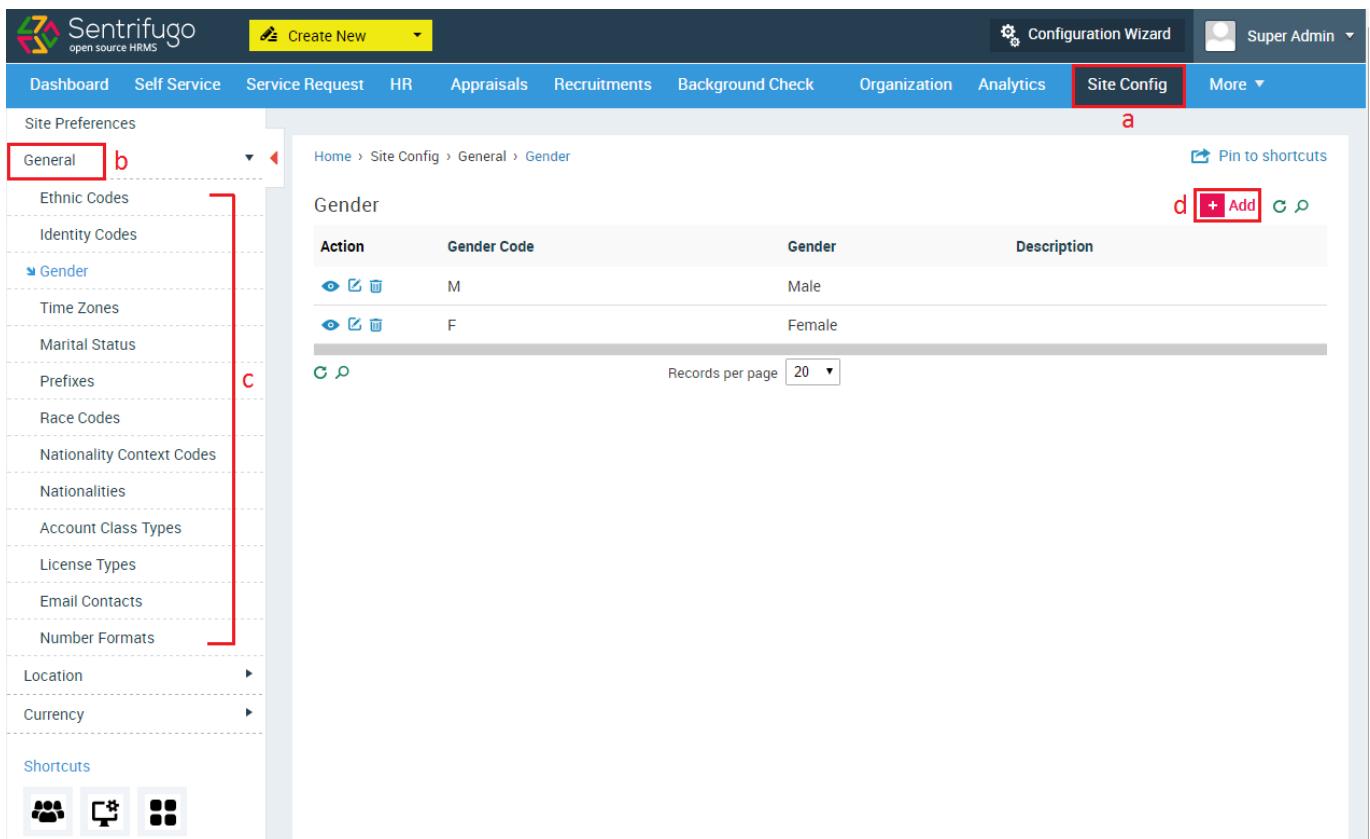
Figure 143

- 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

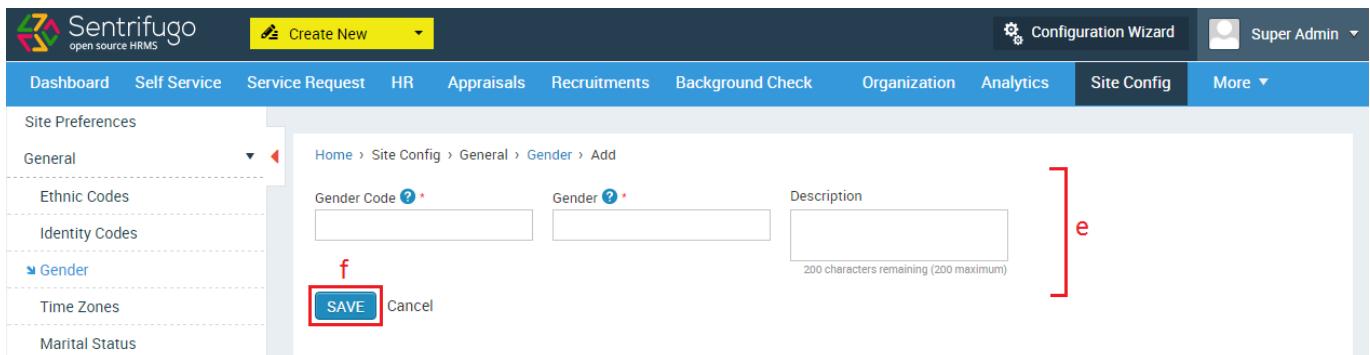
Action	Gender Code	Gender	Description
	M	Male	
	F	Female	

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

SAVE Cancel

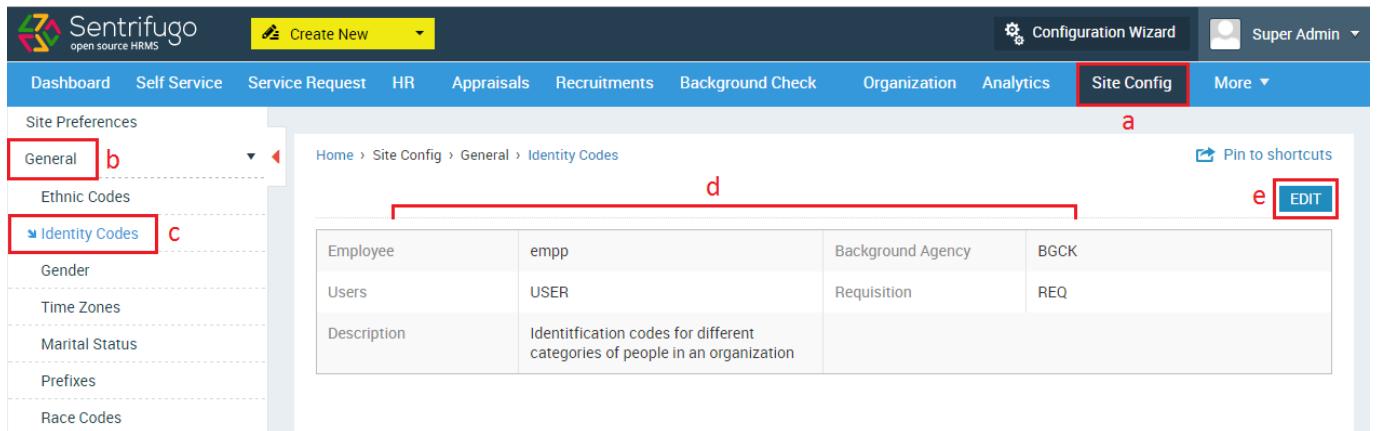
Figure 145

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

11.3 How do I set Identity Codes?

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

Please refer Figure 146



The screenshot shows the Sentrifugo interface with the following elements:

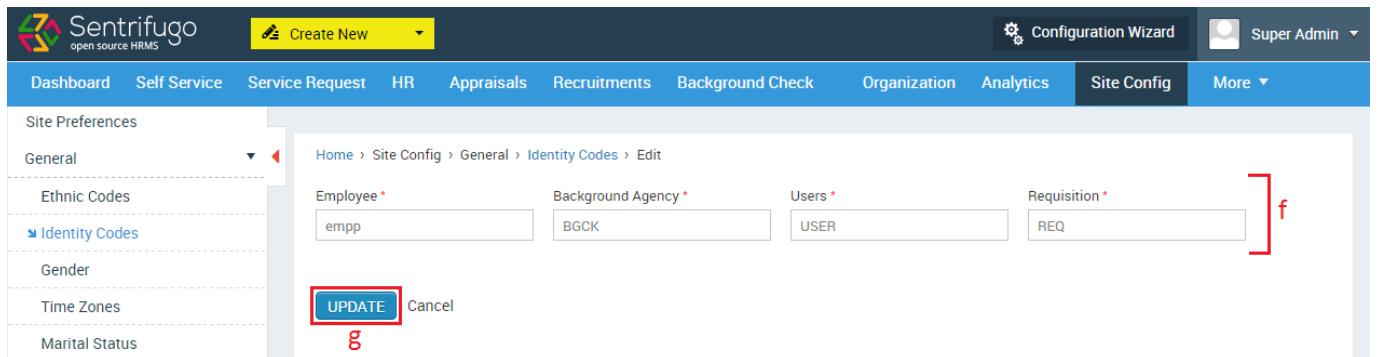
- Top Bar:** Sentrifugo logo, Create New button, Configuration Wizard, Super Admin dropdown.
- Top Menu:** Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (highlighted), More.
- Left Sidebar:** Site Preferences section with General, Ethnic Codes, and Identity Codes (selected).
- Breadcrumb:** Home > Site Config > General > Identity Codes.
- Content Area:** A table showing Identity Codes details:

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 button, Edit icon (highlighted with a red box).

Figure 146

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

Please refer Figure 147



The screenshot shows the Sentrifugo interface with the following elements:

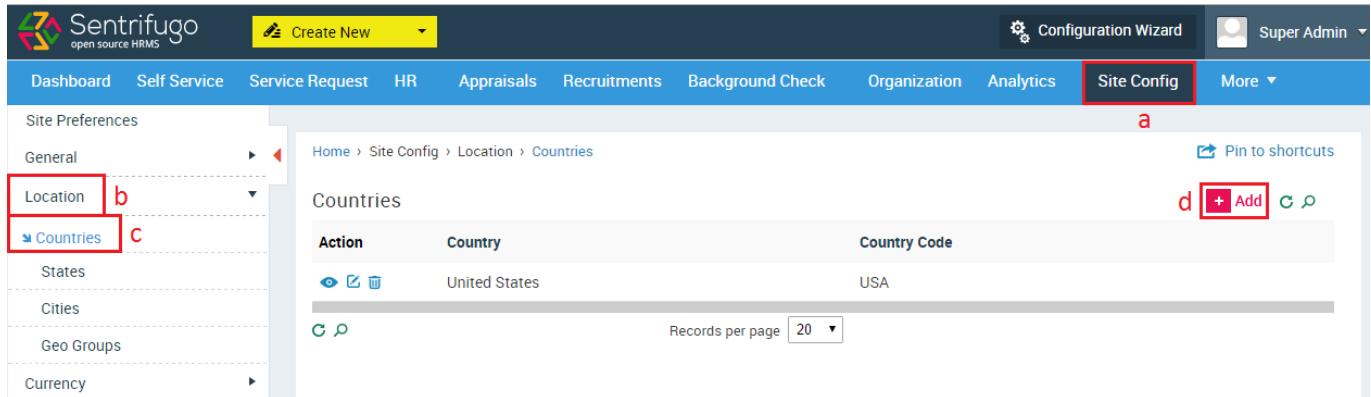
- Top Bar:** Sentrifugo logo, Create New button, Configuration Wizard, Super Admin dropdown.
- Top Menu:** Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (highlighted), More.
- Left Sidebar:** Site Preferences section with General, Ethnic Codes, and Identity Codes (selected).
- Breadcrumb:** Home > Site Config > General > Identity Codes > Edit.
- Form:** Fields for Employee, Background Agency, Users, and Requisition, each with a required asterisk (*). The Employee field contains 'empp', Background Agency contains 'BGCK', Users contains 'USER', and Requisition contains 'REQ'. A red bracket labeled 'f' groups these four fields.
- Buttons:** UPDATE button (highlighted with a red box) and Cancel button.
- Bottom Left:** G label.

Figure 147

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

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

Please refer Figure 148



Action	Country	Country Code
	United States	USA

Figure 148

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

Please refer Figure 149

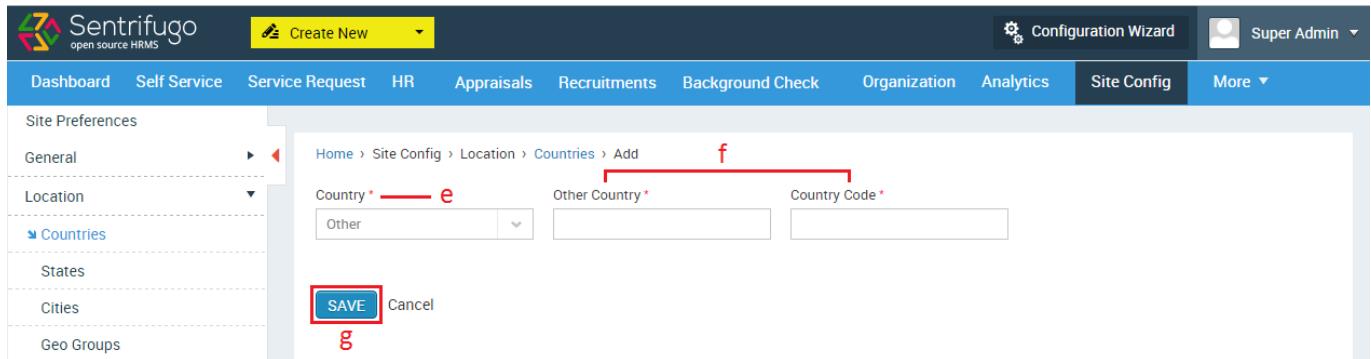


Figure 149

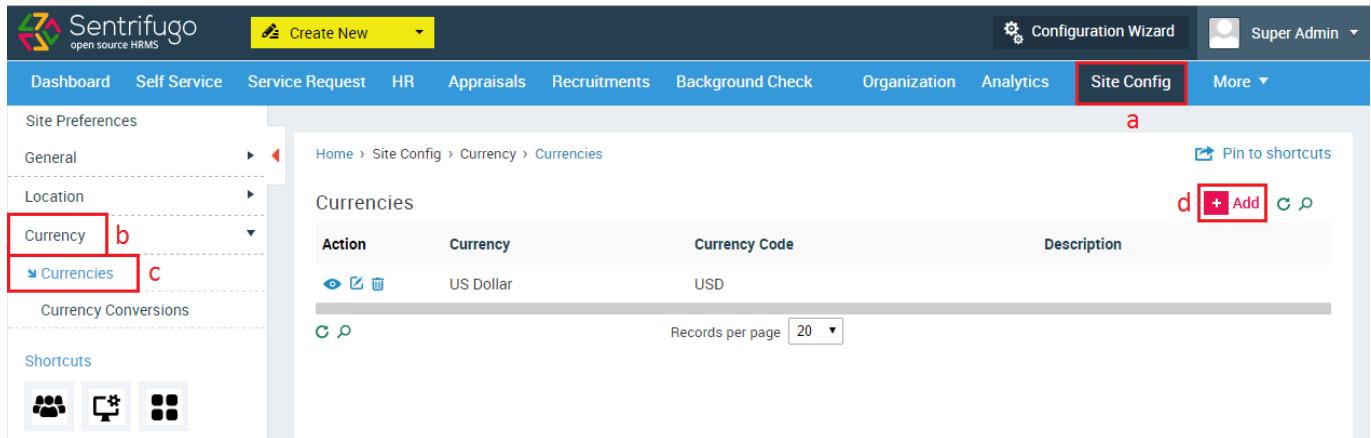
- Select 'Other' in the Country field
- Provide Other Country name and code
- Click **SAVE** button

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

11.5 How do I add Currency and Currency Conversions?

Currencies

Please refer Figure 150

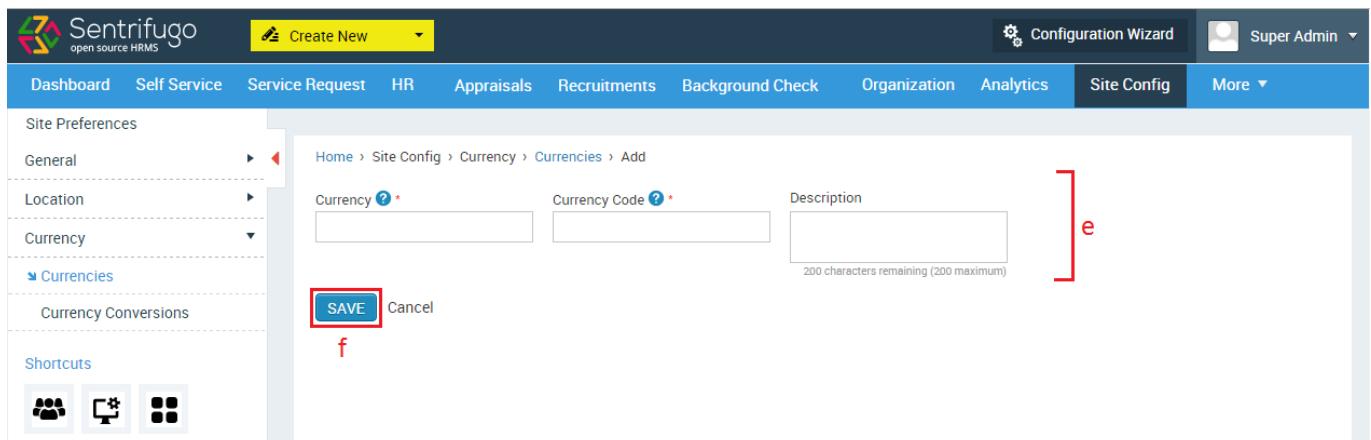


The screenshot shows the Sentrifugo application interface. The top navigation bar includes 'Create New', 'Configuration Wizard', and 'Super Admin'. The main menu has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (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, edit, delete), Currency (US Dollar), Currency Code (USD). There are 'Pin to shortcuts' and '+ Add' buttons. 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



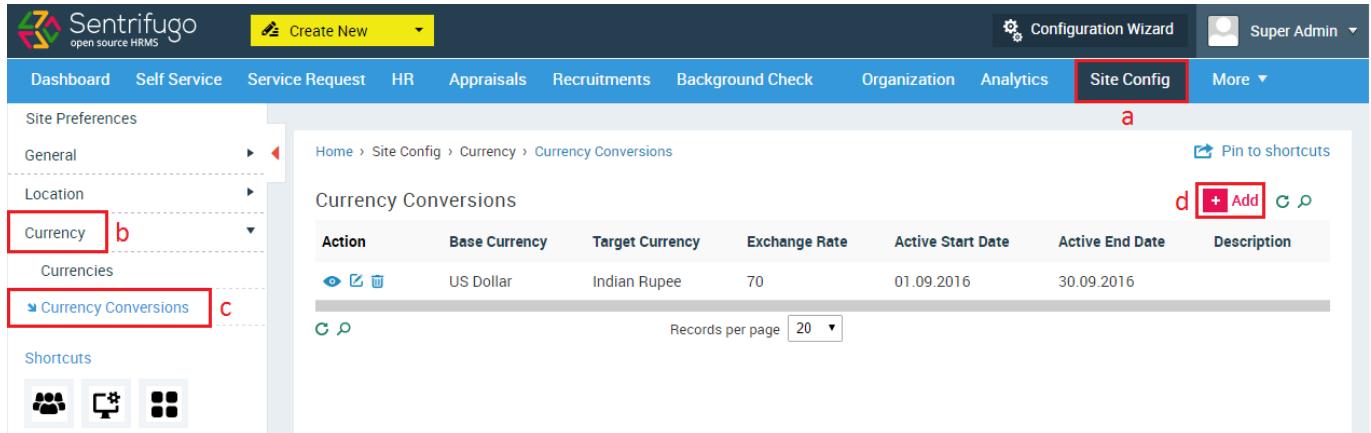
The screenshot shows the 'Add' page for currencies. The left sidebar is identical to Figure 150. The main form has fields for 'Currency' (highlighted with a red box 'e') and 'Currency Code' (also marked with a red box 'e'). Below these is a 'Description' text area with a note '200 characters remaining (200 maximum)'. 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

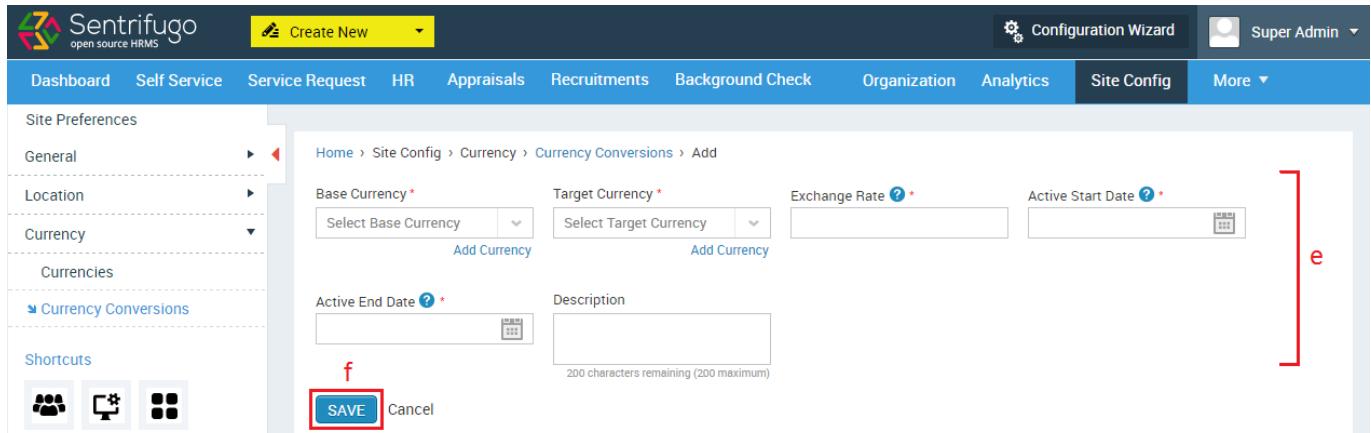


Action	Base Currency	Target Currency	Exchange Rate	Active Start Date	Active End Date	Description
	US Dollar	Indian Rupee	70	01.09.2016	30.09.2016	

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



Base Currency *	Target Currency *	Exchange Rate ? *	Active Start Date ? *
Select Base Currency	Select Target Currency	<input type="text"/>	<input type="text"/>
Add Currency	Add Currency		
Active End Date ? *	Description		
<input type="text"/>	<input type="text"/>	200 characters remaining (200 maximum)	

Figure 153

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

12. Modules

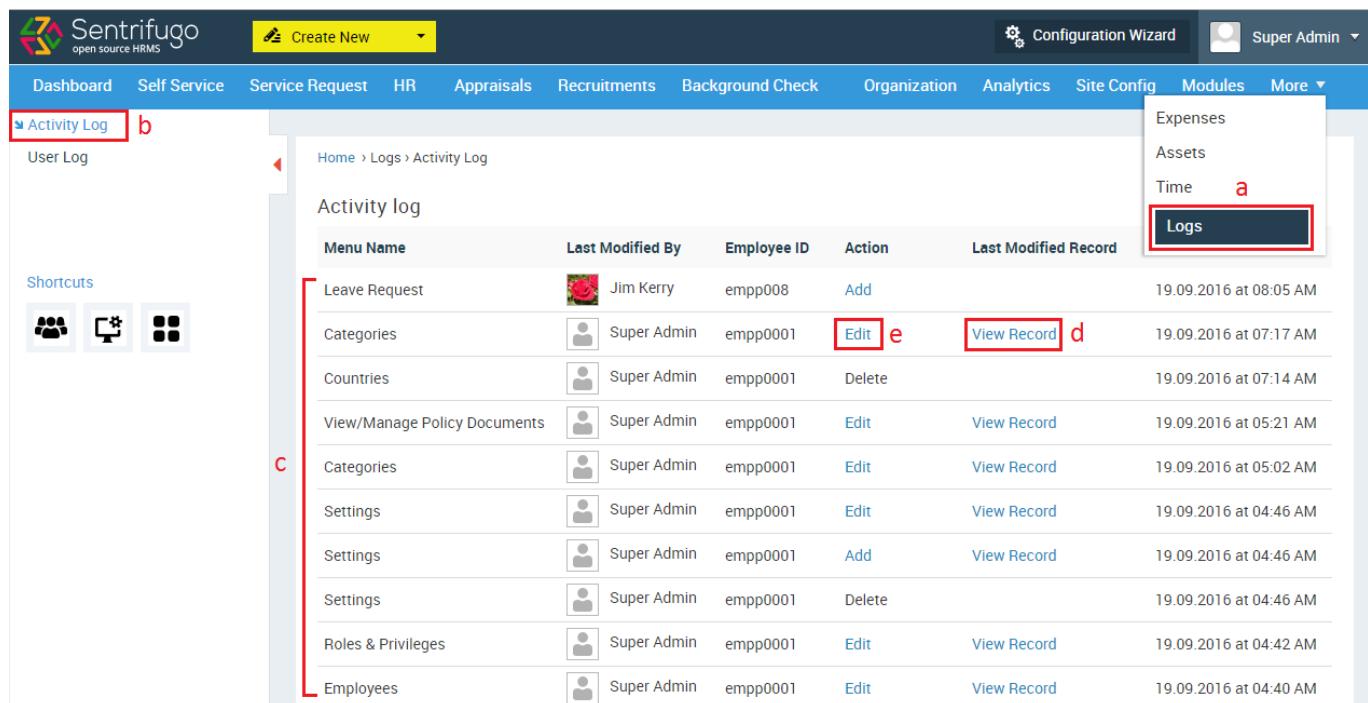
Please refer section [1.3.1 Configuration Wizard: Step 1](#)

13. Logs

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

13.1 How do I view Activity Logs?

Please refer Figure 154



Menu Name	Last Modified By	Employee ID	Action	Last Modified Record
Leave Request	Jim Kerry	empp008	Add	19.09.2016 at 08:05 AM
Categories	Super Admin	empp0001	Edit e	View Record d
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

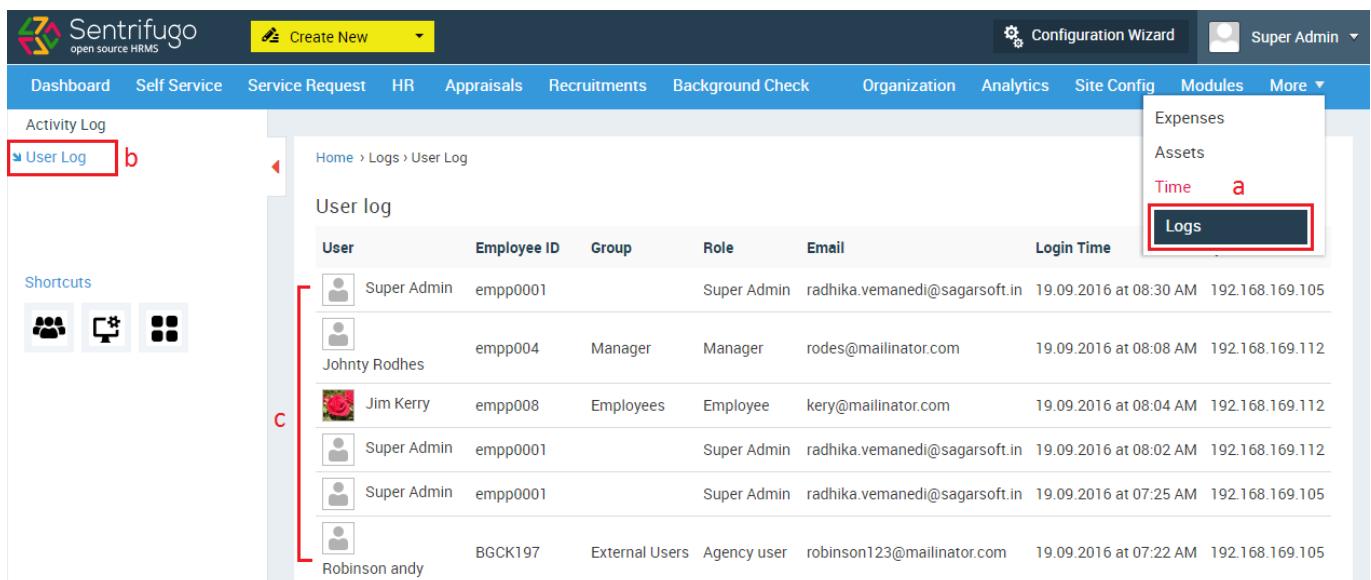
User	Employee ID	Date	Record
 Super Admin	empp0001	19.09.2016 at 07:17 AM	View Record
Records per page <input style="border: 1px solid black; padding: 2px 5px;" type="button" value="20"/> ▾			

CLOSE

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

13.2 How do I view User Logs?

Please refer Figure 155



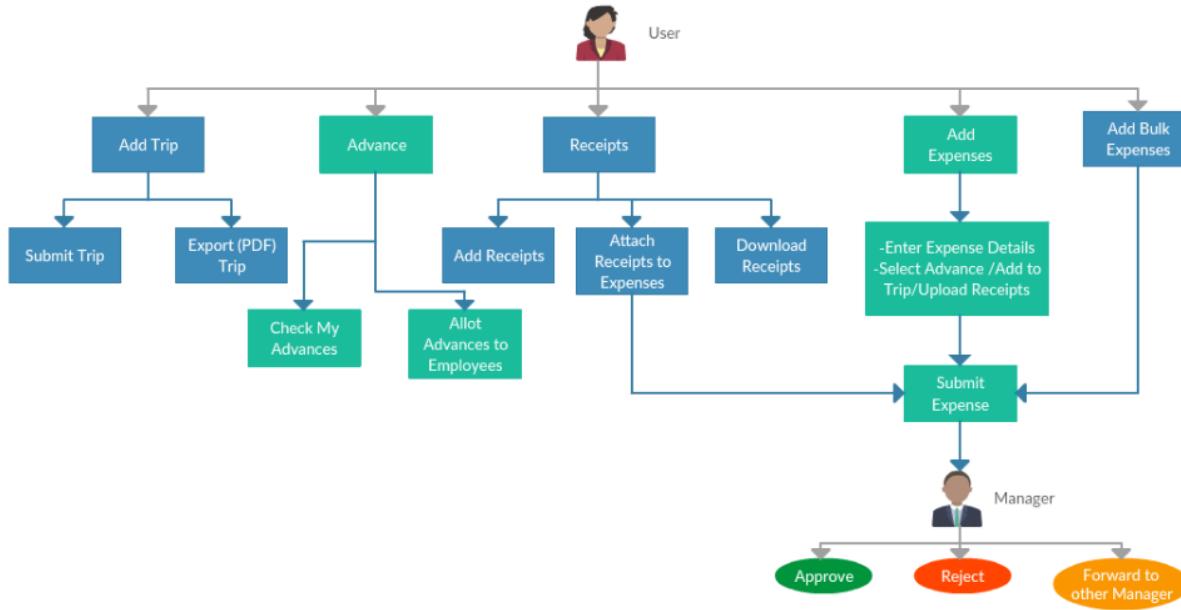
User	Employee ID	Group	Role	Email	Login Time
Super Admin	empp0001		Super Admin	radhika.vemanedi@sagarsoft.in	19.09.2016 at 08:30 AM 192.168.169.105
Johnty Rodhes	empp004	Manager	Manager	rodes@mailinator.com	19.09.2016 at 08:08 AM 192.168.169.112
Jim Kerry	empp008	Employees	Employee	kery@mailinator.com	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

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

14. Expenses

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



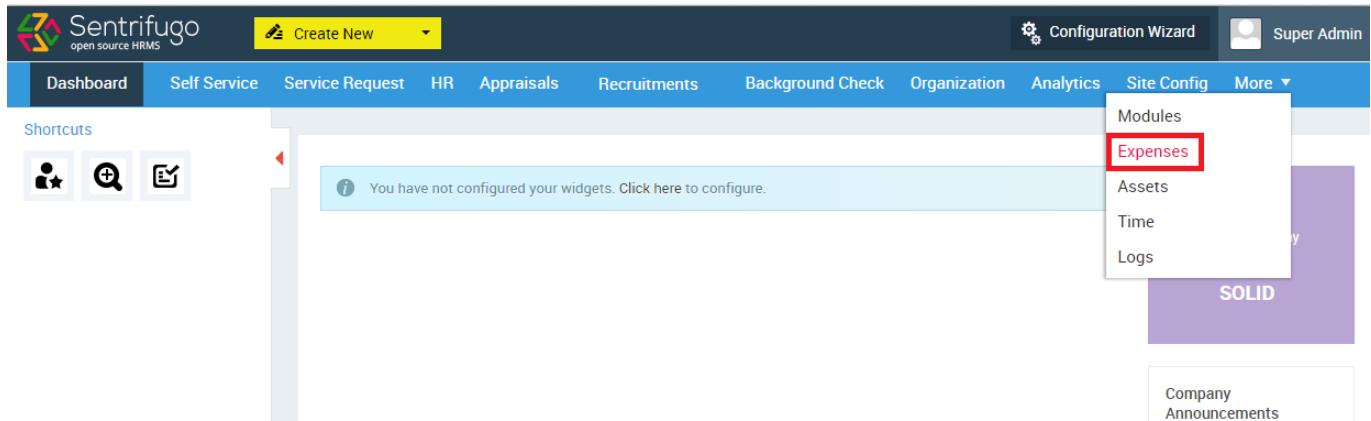
Process Description:

- 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

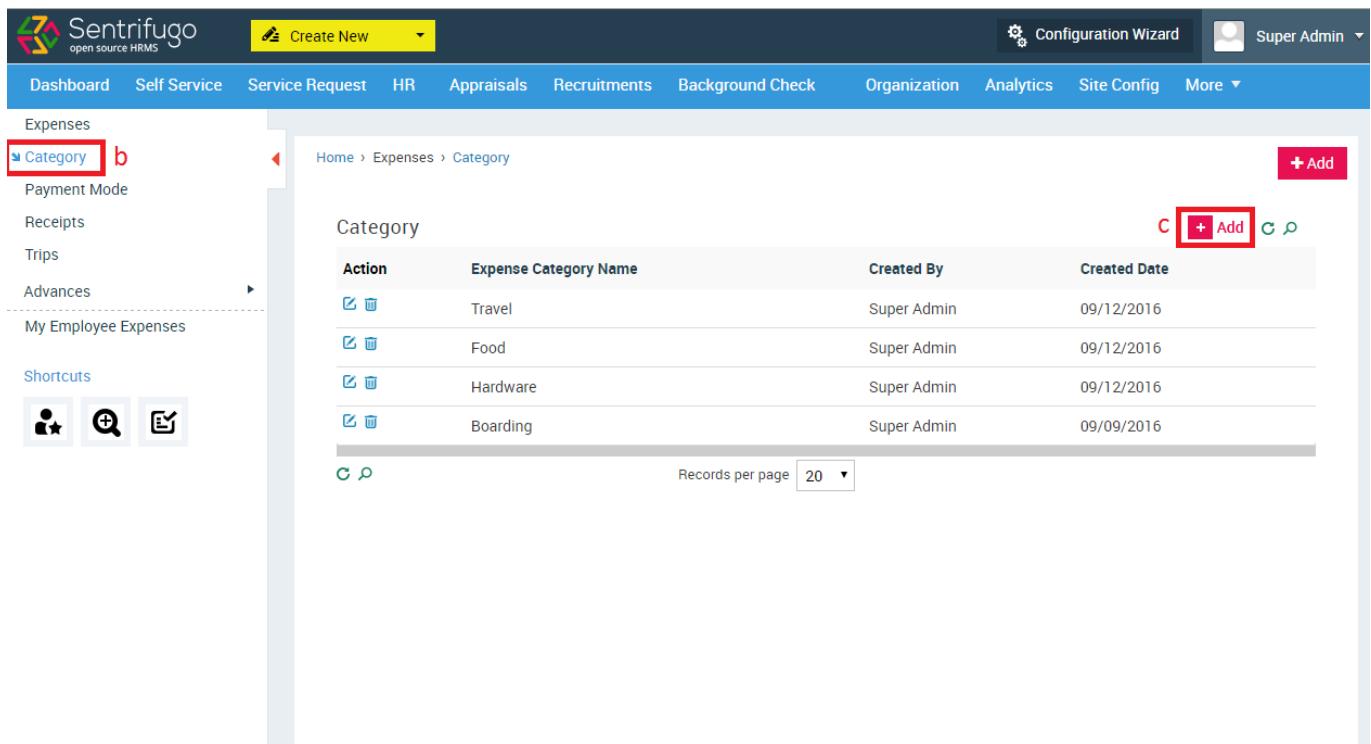


The screenshot shows the Sentrifugo open source HRMS interface. At the top, there is a dark header bar with the Sentrifugo logo, a "Create New" button, a "Configuration Wizard" link, and a "Super Admin" dropdown. Below the header is a blue navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A "Modules" dropdown menu is open, showing options like Expenses (which is highlighted with a red box), Assets, Time, and Logs. On the left side, there is a sidebar with "Shortcuts" containing icons for users, search, and edit. A message box in the center says, "You have not configured your widgets. Click here to configure." In the bottom right corner, there is a "Company Announcements" section.

Figure 156

- Click **Expenses** in the top menu

Please refer Figure 157



The screenshot shows the Sentrifugo interface with the "Expenses" module selected in the left sidebar (indicated by a red box). The left sidebar also lists "Category" (highlighted with a red box), "Payment Mode", "Receipts", "Trips", and "Advances". The main content area shows a breadcrumb path "Home > Expenses > Category" and a table titled "Category". The table has columns for Action, Expense Category Name, Created By, and Created Date. It lists four categories: Travel, Food, Hardware, and Boarding, all created by Super Admin on 09/12/2016. There are "Add" and "Search" buttons at the top right of the table. At the bottom, there is a "Records per page" dropdown set to 20.

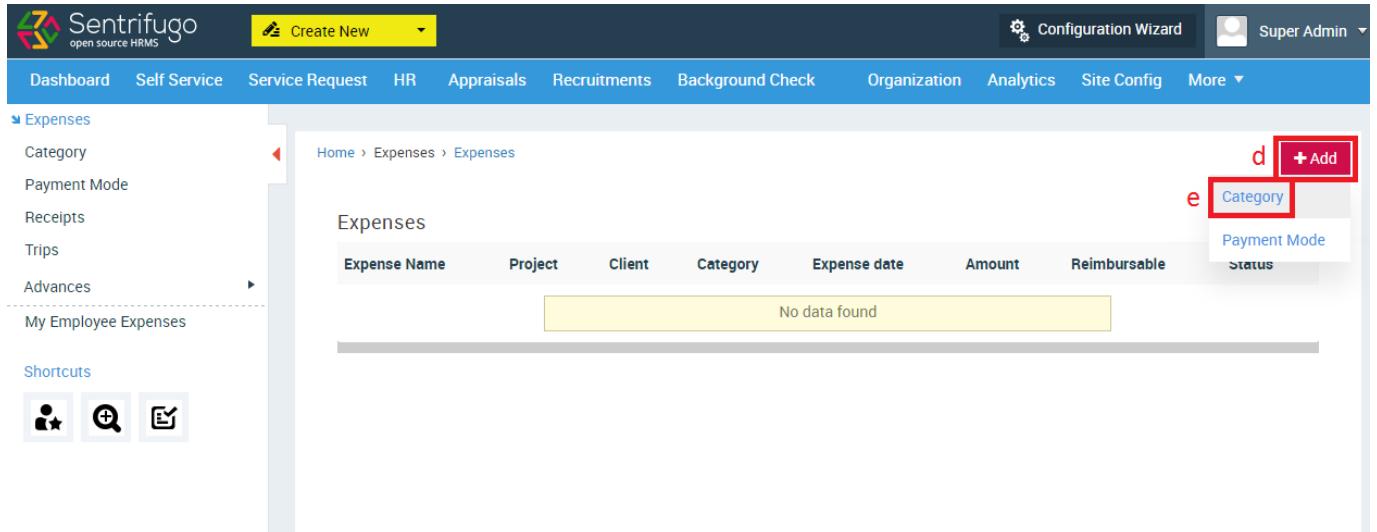
Figure 157

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

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

Or

Please refer Figure 158

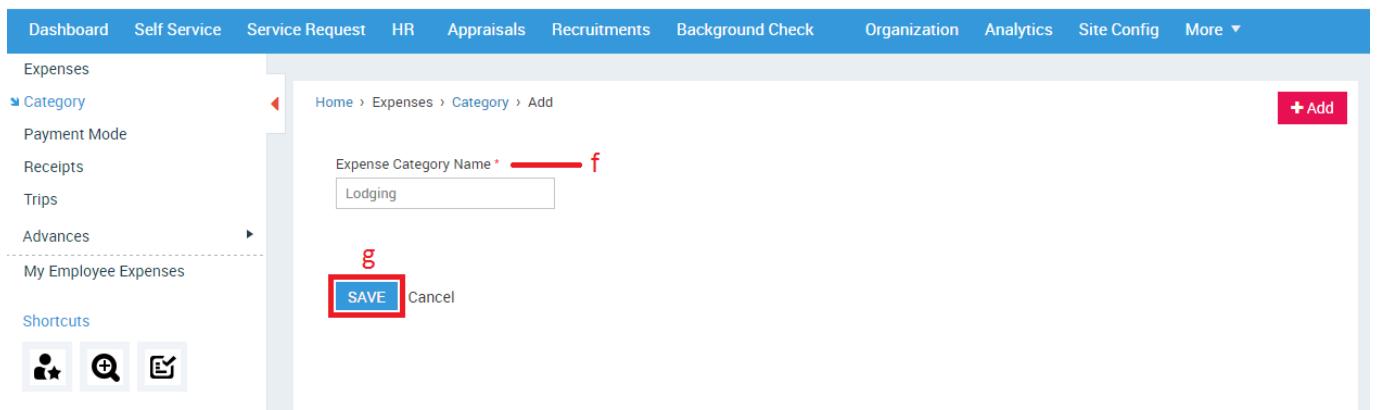


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A 'Create New' button is visible in the top left. On the far right, there are 'Configuration Wizard' and 'Super Admin' dropdown menus. The main content area is titled 'Expenses' and shows a table with columns: Expense Name, Project, Client, Category, Expense date, Amount, Reimbursable, and Status. A message 'No data found' is displayed below the table. To the left of the table, there is a sidebar with sections for Category, Payment Mode, Receipts, Trips, Advances, and My Employee Expenses. At the bottom of the sidebar are three icons: a user profile, a magnifying glass, and a document. On the right side of the table, there are several buttons labeled 'd', 'e', 'Category', 'Payment Mode', and 'Status'. The 'd' button is a red-bordered '+' icon, and the 'e' button is a red-bordered 'Category' link.

Figure 158

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

Please refer Figure 159



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar is identical to Figure 158. The main content area is titled 'Category' and shows a form with a field labeled 'Expense Category Name *' containing the value 'Lodging'. Below the input field are two buttons: a blue 'SAVE' button with a red border and a 'Cancel' button. The 'SAVE' button is highlighted with a red box. The URL in the browser's address bar is 'Home > Expenses > Category > Add'.

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

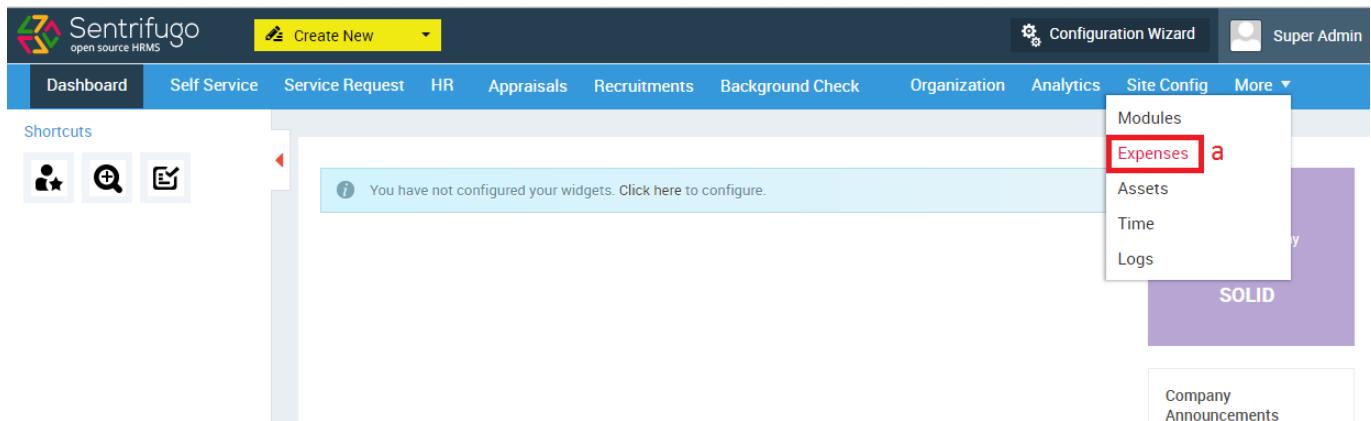


Figure 160

- Click **Expenses** in the top menu

Please refer Figure 161

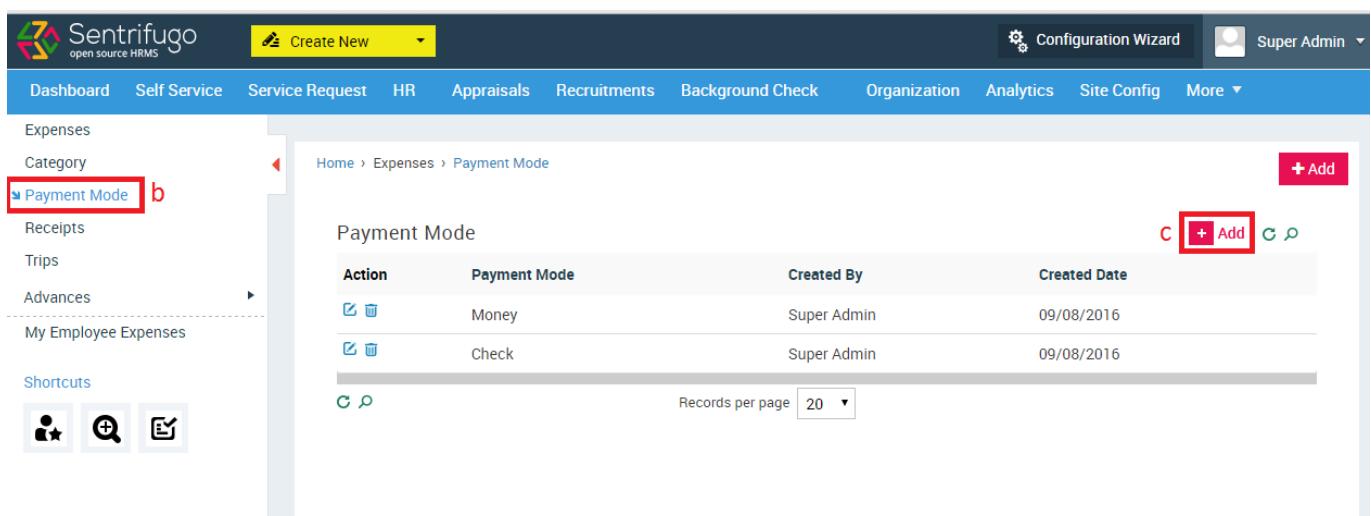
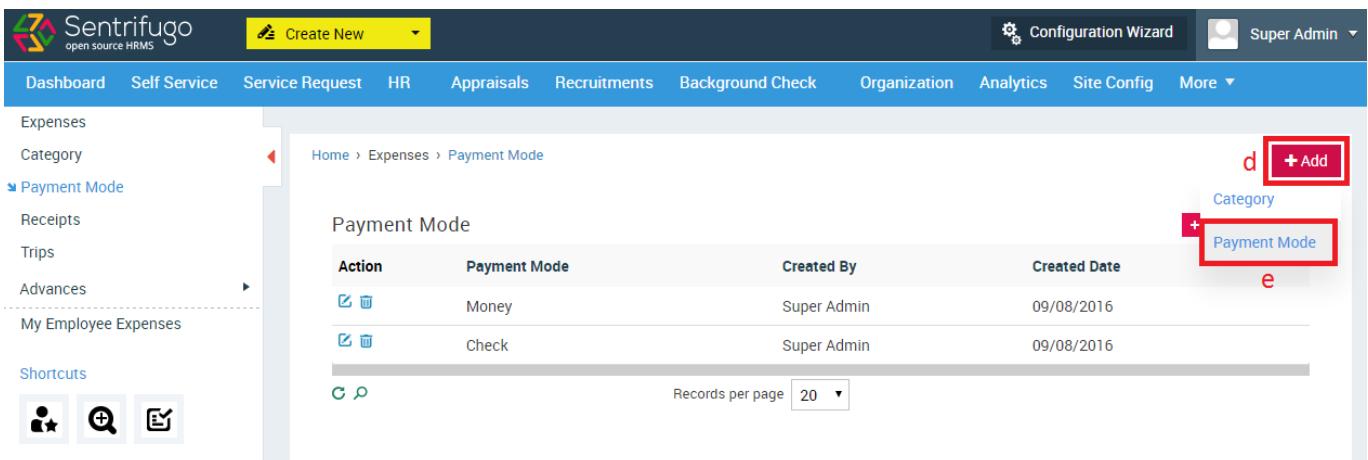


Figure 161

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

Or

Please refer Figure 162

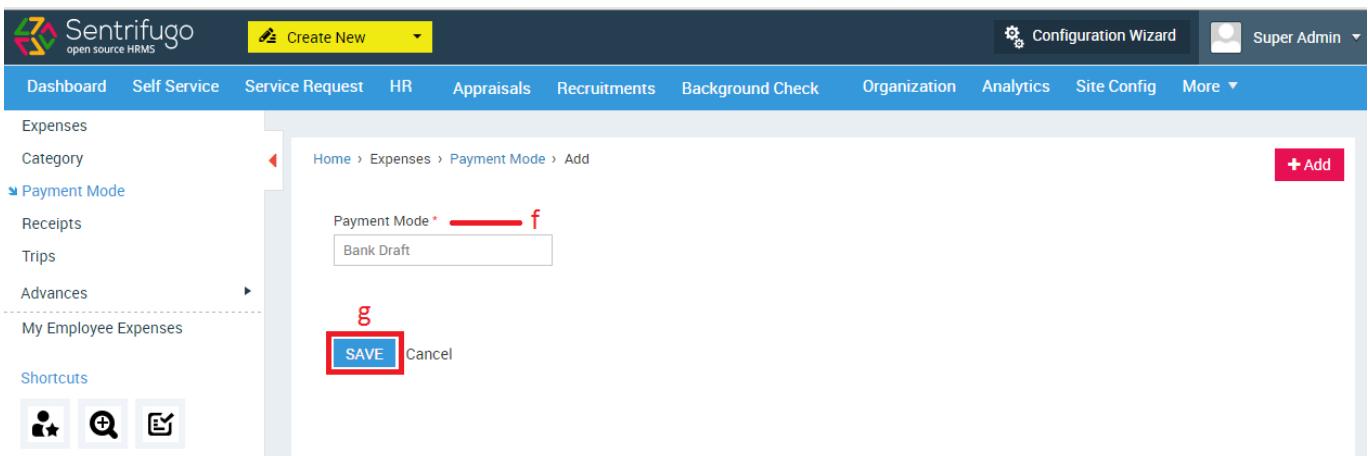


The screenshot shows the Sentrifugo web application interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the far right of the top bar are Configuration Wizard and Super Admin dropdown menus. Below the top bar is a secondary navigation menu with links for Expenses, Category, and Payment Mode (which is currently selected). To the left of the main content area is a sidebar with links for Receipts, Trips, Advances, and My Employee Expenses. The main content area displays a table titled "Payment Mode" with two rows: "Money" and "Check". The table has columns for Action, Payment Mode, Created By, and Created Date. A red box labeled "d" highlights the "+Add" button in the top right corner of the table header. Another red box labeled "e" highlights the "Payment Mode" link in the table header. The bottom right of the table shows a "Records per page" dropdown set to 20.

Figure 162

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

Please refer Figure 163



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, Organization, Analytics, Site Config, and More. On the far right of the top bar are Configuration Wizard and Super Admin dropdown menus. Below the top bar is a secondary navigation menu with links for Expenses, Category, and Payment Mode (which is currently selected). To the left of the main content area is a sidebar with links for Receipts, Trips, Advances, and My Employee Expenses. The main content area shows a form titled "Payment Mode" with a single input field containing "Bank Draft". Below the input field is a red box labeled "f" indicating the field name. At the bottom of the form are two buttons: a blue "SAVE" button with a red box around it, and a "Cancel" button. A red box labeled "g" highlights the "SAVE" button.

Figure 163

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

14.3 How do I add an Expense?

Please refer Figure 164

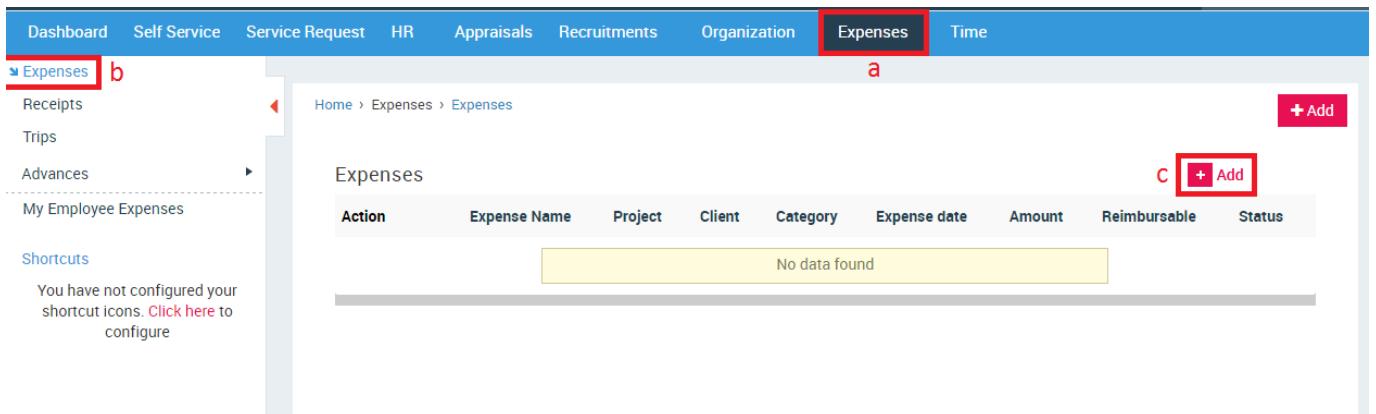


Figure 164

- 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

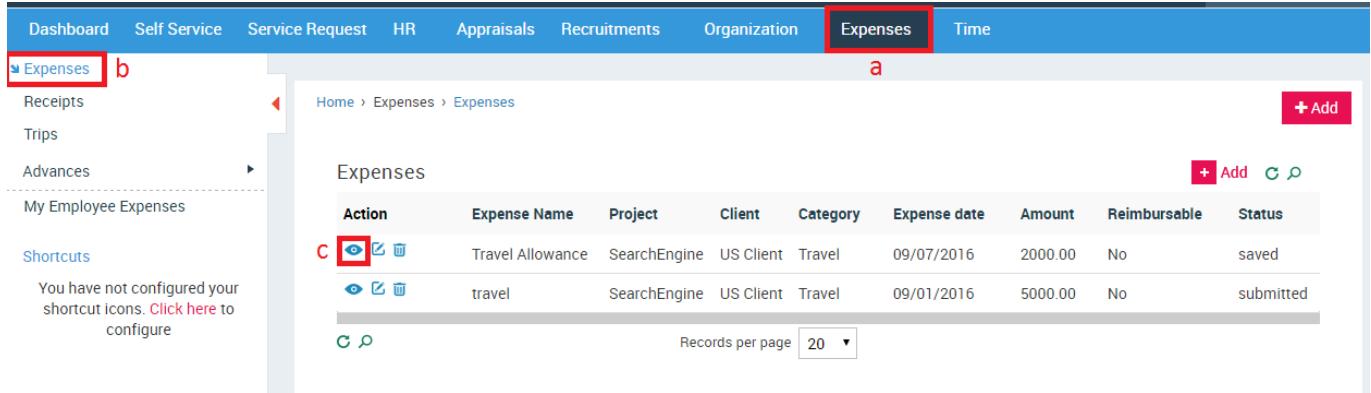
- Enter the required details
- Not functional in the current version
- Employers can pre-allocate a certain amount of money called **Advance** to an employee, which can be used for expenses incurred during trip(s) or for project(s) and client(s).
- Add Trips for managing multiple expenses, clients and 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



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 with a red box), and Time. On the left, there's a sidebar with sections: Expenses (highlighted with a red box), Receipts, Trips, Advances, My Employee Expenses, and Shortcuts. The main content area shows a list of expenses under the heading 'Expenses'. The table columns are: Action, Expense Name, Project, Client, Category, Expense date, Amount, Reimbursable, and Status. There are two entries:

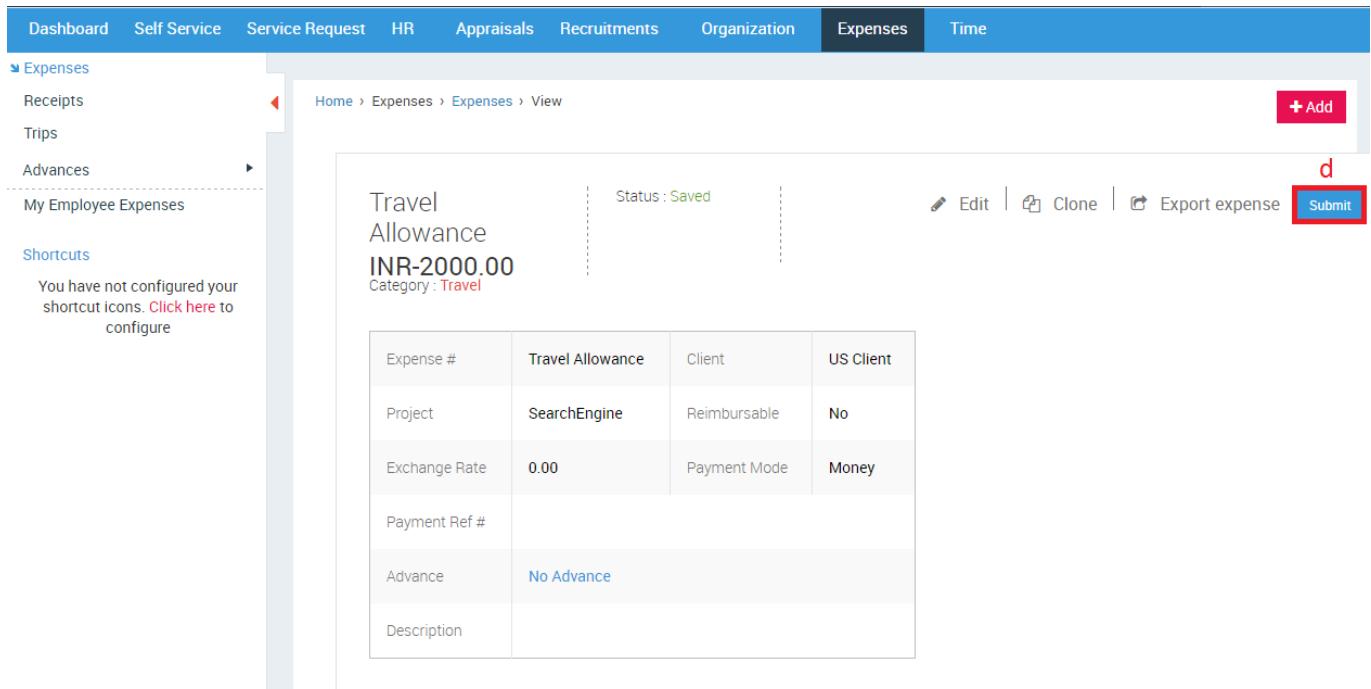
Action	Expense Name	Project	Client	Category	Expense date	Amount	Reimbursable	Status
	Travel Allowance	SearchEngine	US Client	Travel	09/07/2016	2000.00	No	saved
	travel	SearchEngine	US Client	Travel	09/01/2016	5000.00	No	submitted

At the bottom right of the list area, there are buttons for '+ Add' and 'C ⌂'. Below the table, it says 'Records per page' with a dropdown set to '20'. A red letter 'a' is placed above the 'Expenses' tab in the top bar, and a red letter 'b' is placed next to the 'Expenses' section in the sidebar.

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



This screenshot shows the same interface as Figure 166, but focusing on a single expense record. The top navigation bar and sidebar are identical. The main content area now displays a single expense entry under the heading 'Travel Allowance' with the amount 'INR-2000.00'. The status is listed as 'Saved'. At the top right, there are buttons for 'Edit', 'Clone', 'Export expense', and a red-bordered 'Submit' button. Below the heading, there's a table with various details:

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

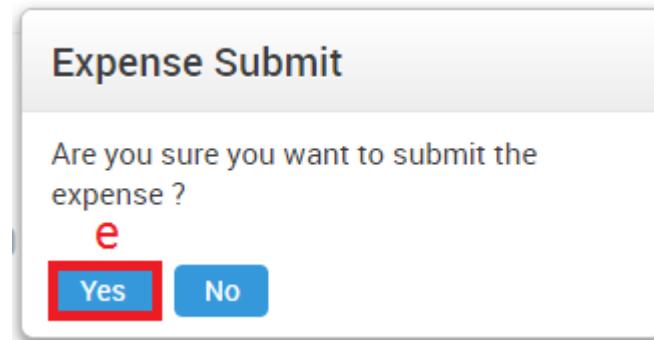


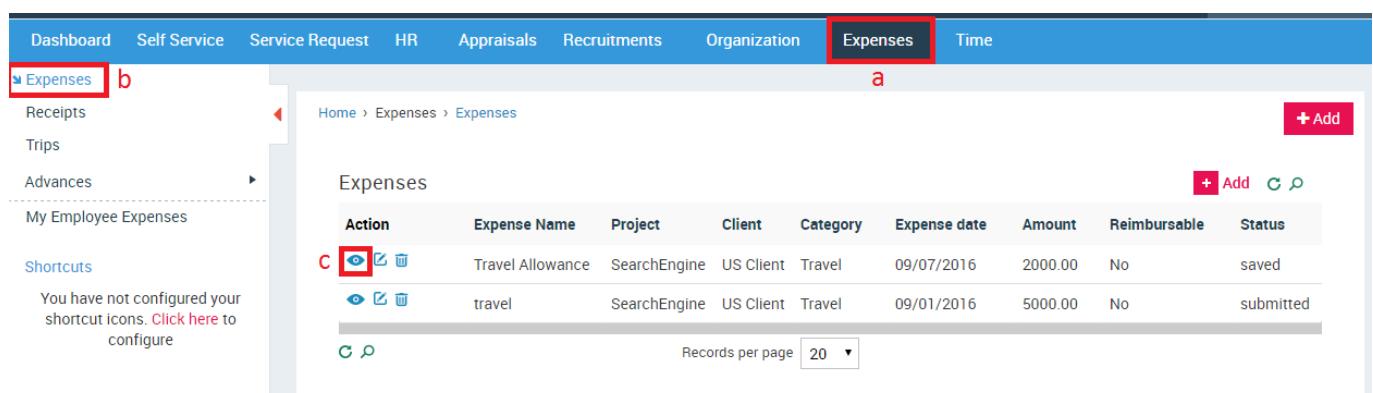
Figure 168

- 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

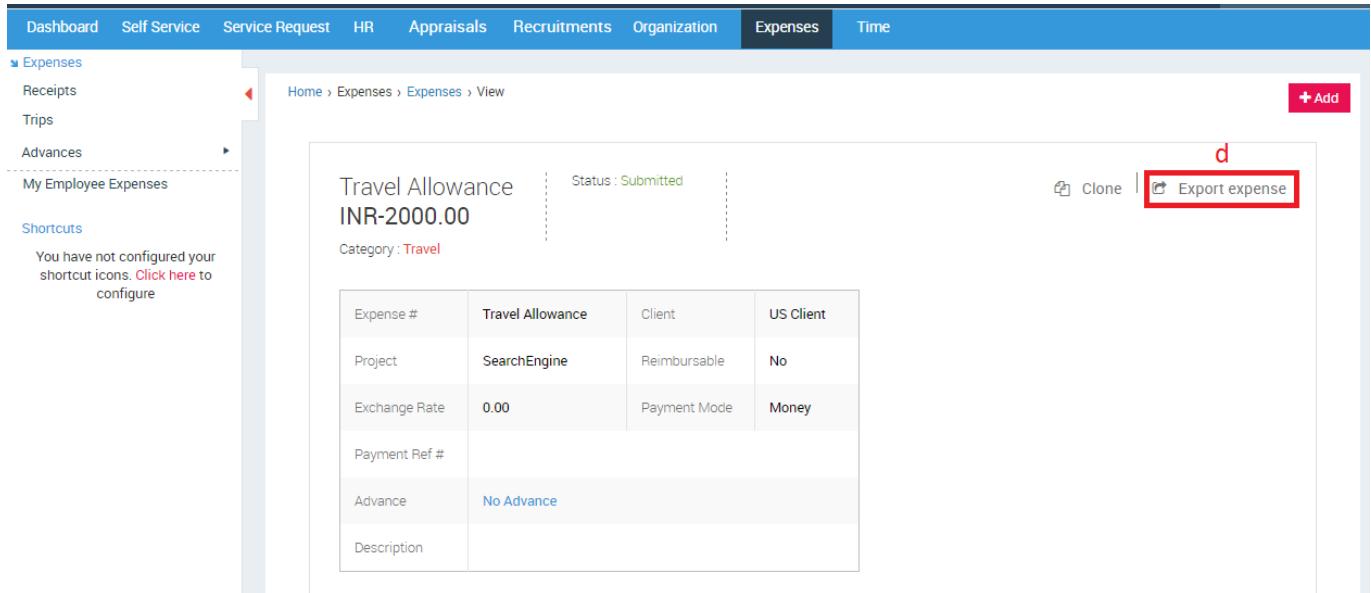


The screenshot shows the Sentrifugo interface with the "Expenses" module selected. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (highlighted with a red box), and Time. The left sidebar has sections for Receipts, Trips, Advances, and My Employee Expenses. A note says "You have not configured your shortcut icons. Click here to configure". The main content area shows a list of expenses with columns for Action, Expense Name, Project, Client, Category, Expense date, Amount, Reimbursable, and Status. Two entries are listed: "Travel Allowance" and "travel". The "Actions" column contains icons for View, Edit, and Delete. A "Records per page" dropdown is set to 20.

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 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 details like Category: Travel, Status: Submitted, and various financial fields. A red box highlights the 'Export expense' button in the top right corner.

Figure 170

- Click Export expense button

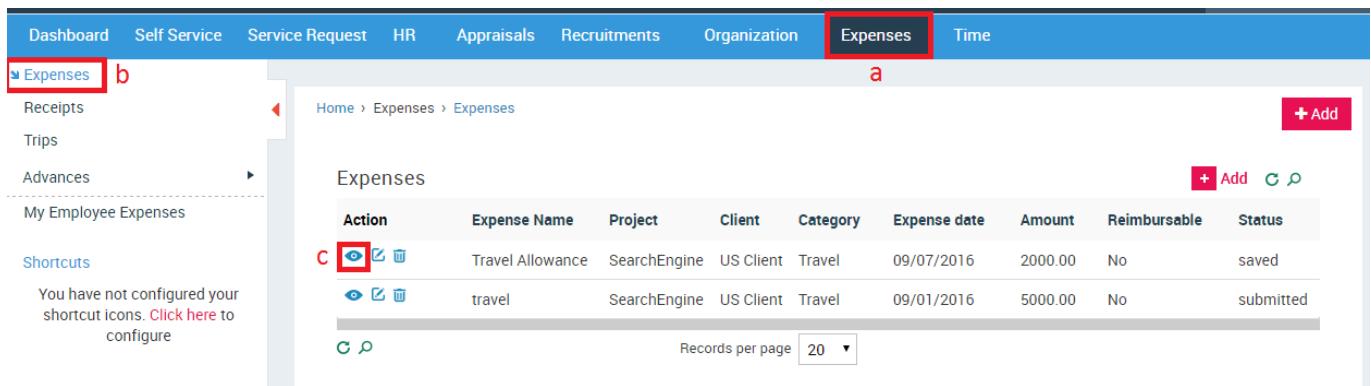
An expense report in PDF format will be downloaded.

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

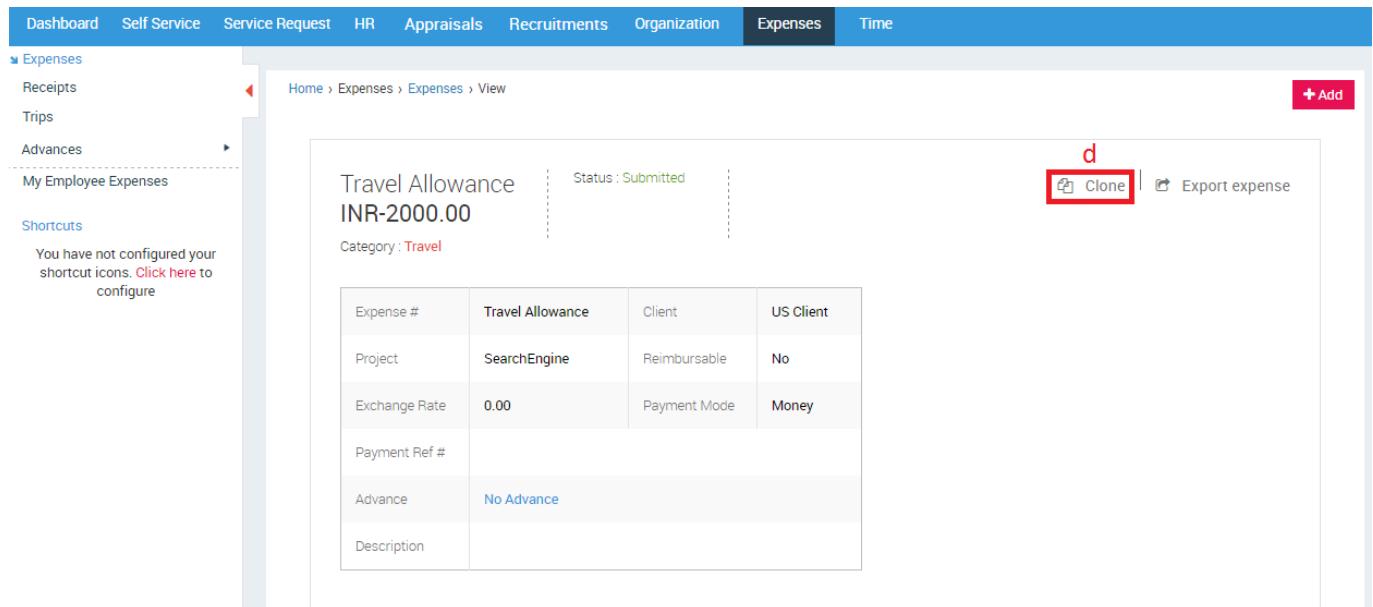


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (selected and highlighted in blue), and Time. The left sidebar menu includes Expenses (highlighted with a red box 'b'), Receipts, Trips, Advances, My Employee Expenses, and Shortcuts (with a note about configuring shortcut icons). The main content area displays a list of expenses with columns for Action, Expense Name, Project, Client, Category, Expense date, Amount, Reimbursable, and Status. The first expense in the list has its 'View' button in the Action column highlighted with a red box 'c'. A red box 'a' highlights the 'Expenses' tab in the top menu.

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



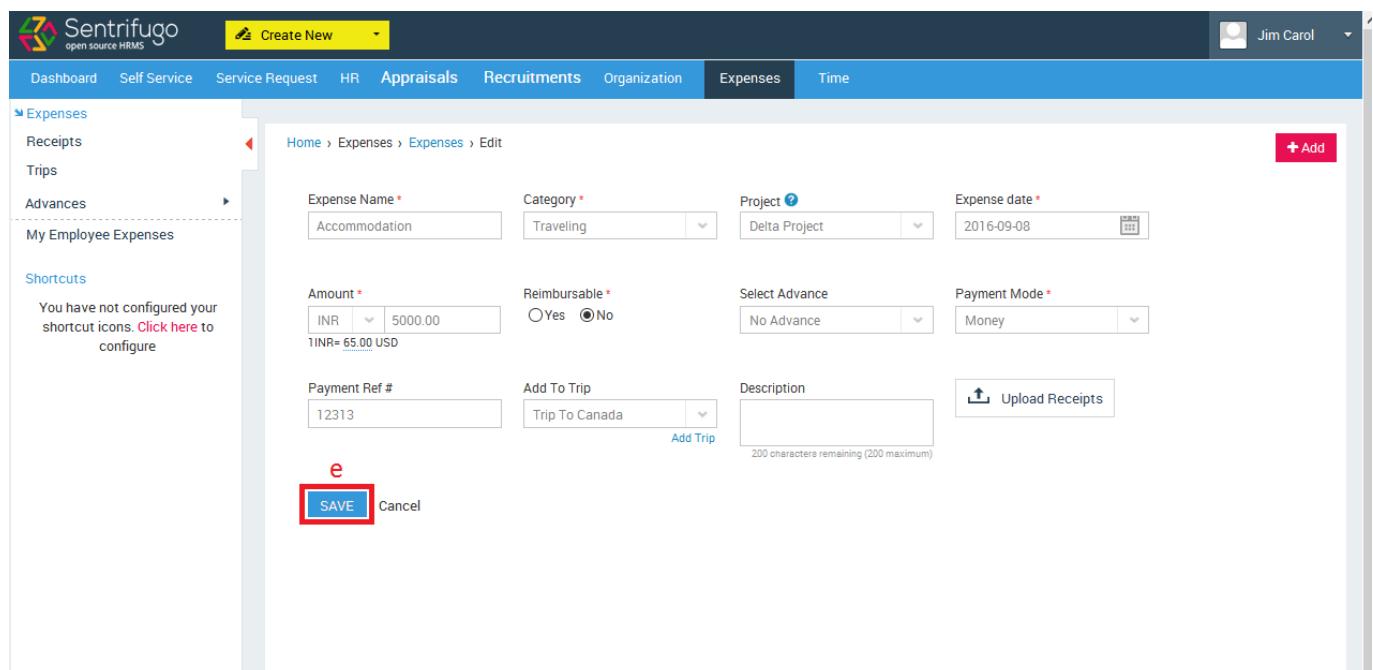
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (selected), and Time. On the left, a sidebar for 'Expenses' lists Receipts, Trips, Advances, and My Employee Expenses. A 'Shortcuts' section indicates no configured icons. The main content area displays a travel allowance expense with the ID INR-2000.00, status 'Submitted', category 'Travel', and details like Project (SearchEngine), Reimbursable (Yes), Exchange Rate (0.00), Payment Mode (Money), Advance (No Advance), and Description (empty). A red box highlights the 'Clone' button in the top right corner.

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



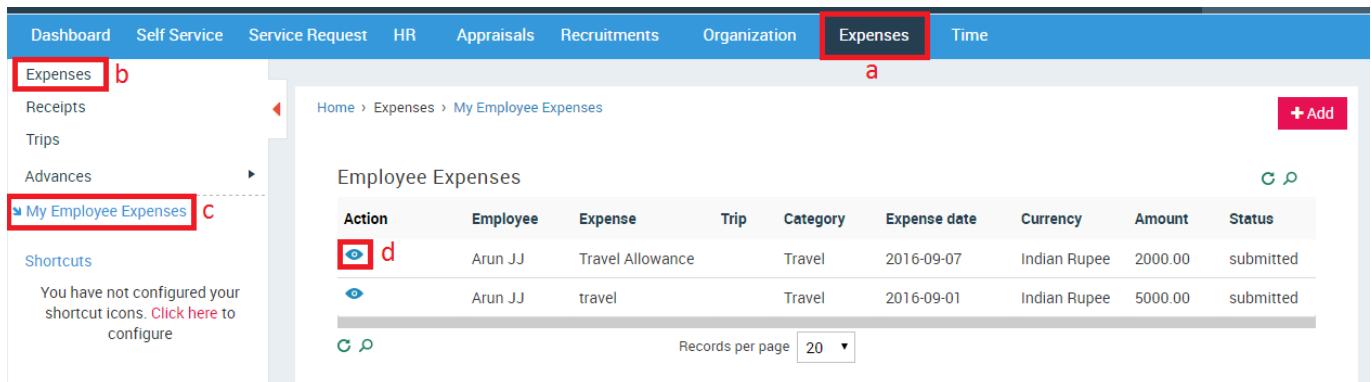
The screenshot shows the 'Edit' screen for a new expense. The top navigation bar and sidebar are identical to Figure 172. The main form fields include: Expense Name (Accommodation), Category (Traveling), Project (Delta Project), Expense date (2016-09-08), Amount (INR 5000.00, converted to 65.00 USD), Reimbursable (Yes selected), Select Advance (No Advance), Payment Mode (Money), Payment Ref # (12313), Add To Trip (Trip To Canada), Description (empty), and Upload Receipts (button). A red box highlights the 'SAVE' button at the bottom left of the form.

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 blue), and Time. On the left, there's a sidebar with links: Expenses (highlighted with a red box and labeled 'b'), Receipts, Trips, Advances, My Employee Expenses (highlighted with a red box and labeled 'c'), and Shortcuts. 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:

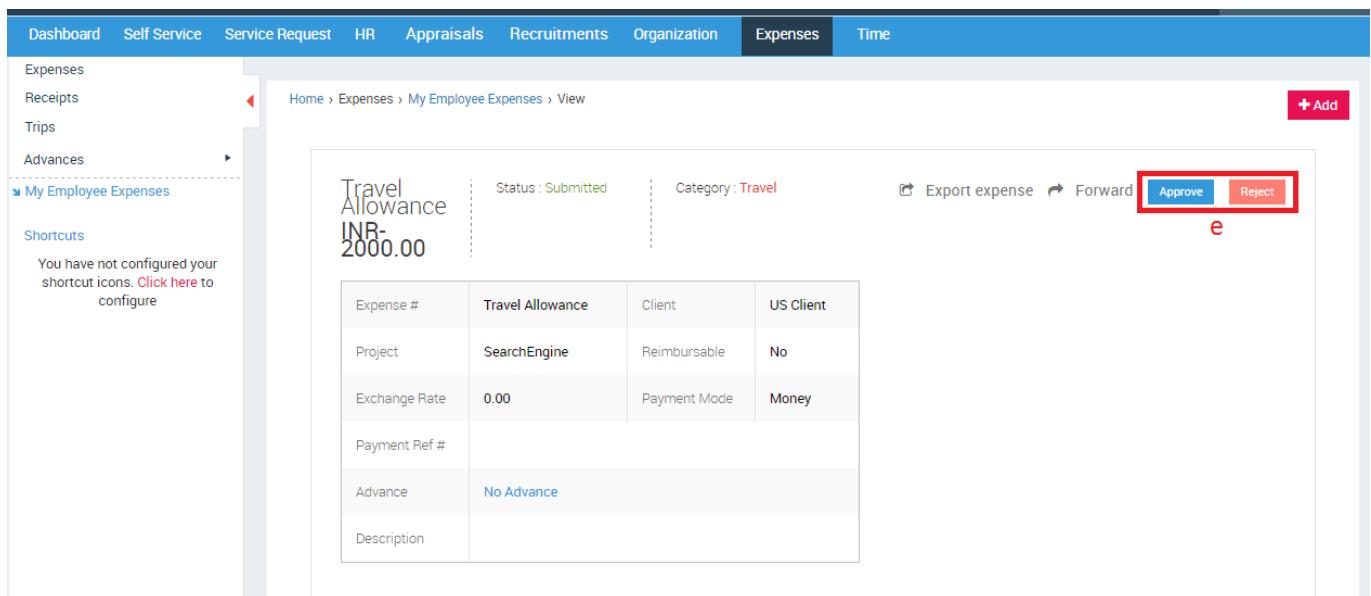
Action	Employee	Expense	Trip	Category	Expense date	Currency	Amount	Status
	Arun JJ	Travel Allowance		Travel	2016-09-07	Indian Rupee	2000.00	submitted
	Arun JJ	travel		Travel	2016-09-01	Indian Rupee	5000.00	submitted

Below the table are search and filter controls: a magnifying glass icon, a refresh icon, and a dropdown for 'Records per page' set to 20. The URL in the browser is 'Home > Expenses > My Employee Expenses'. A red box labeled 'a' is at the top right of the main content area.

Figure 174

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

Please refer Figure 175



The screenshot shows 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 with a red box and labeled 'e'), 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

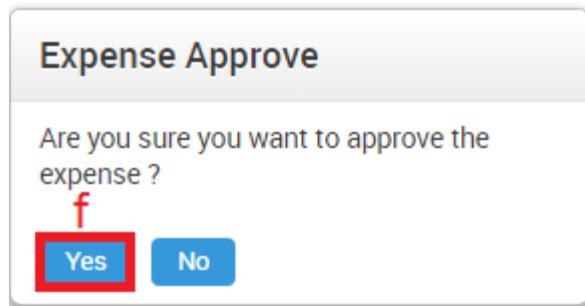
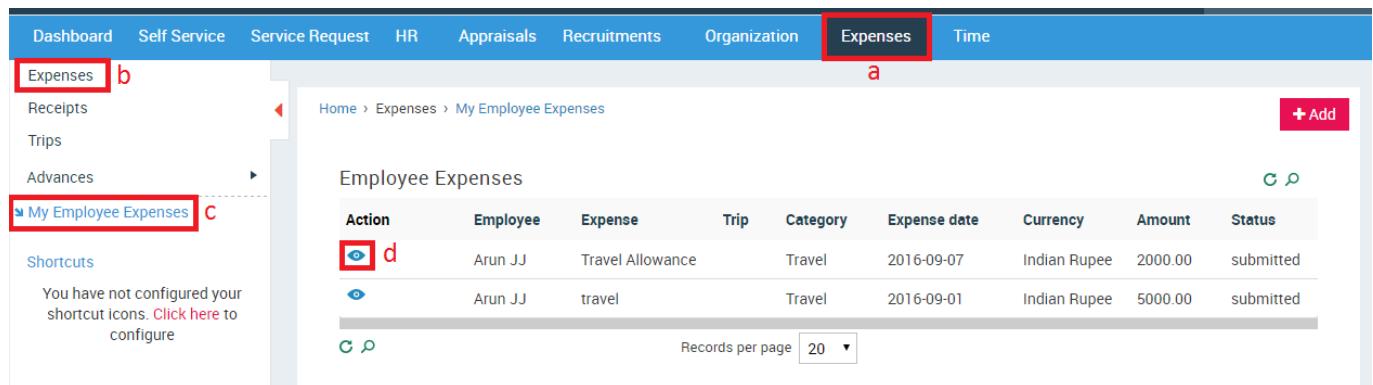


Figure 176

- Click **Yes** Button

14.8 How do I forward an Expense to another Manager?

Please refer Figure 177

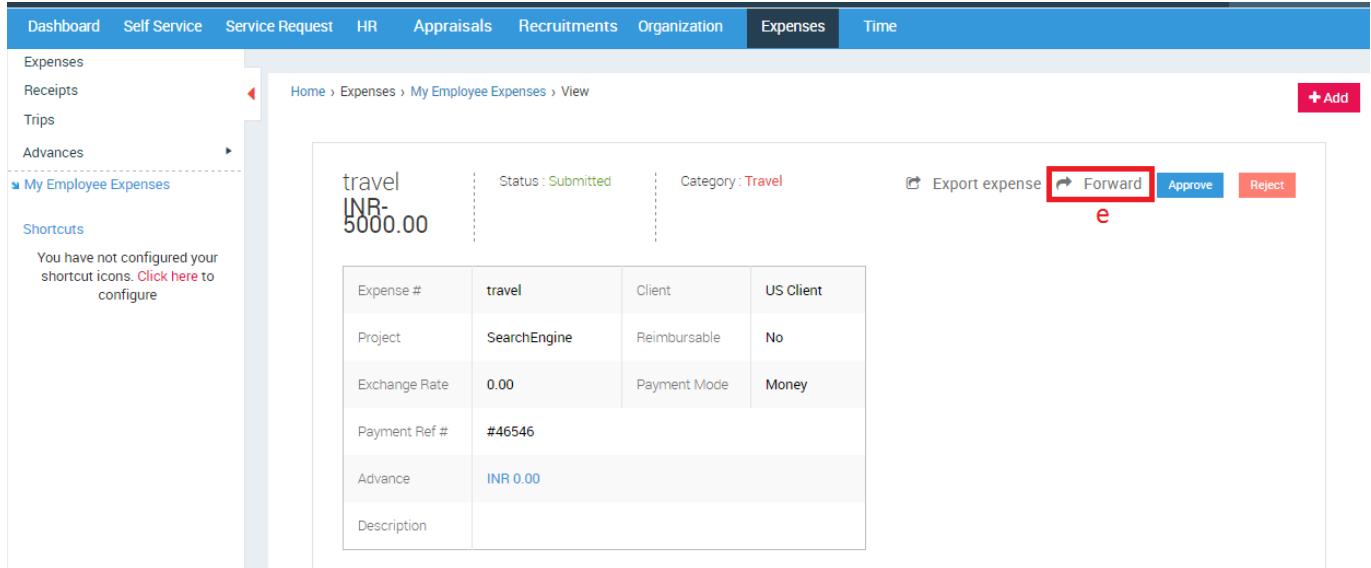


Action	Employee	Expense	Trip	Category	Expense date	Currency	Amount	Status
	Arun JJ	Travel Allowance	Travel	Travel	2016-09-07	Indian Rupee	2000.00	submitted
	Arun JJ	travel	Travel	Travel	2016-09-01	Indian Rupee	5000.00	submitted

Figure 177

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

Please refer Figure 178



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, Advances, and My Employee Expenses (which is selected). Below this is a section for Shortcuts. The main content area displays a travel expense entry for 'travel' worth 'INR- 5000.00'. The status is 'Submitted' and the category is 'Travel'. Action buttons include 'Export expense', 'Forward' (highlighted with a red box), 'Approve', and 'Reject'. A note in the sidebar says: 'You have not configured your shortcut icons. Click here to configure'.

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

Figure 178

- e. Click **Forward** option

A small pop up window will open

Please refer Figure 178

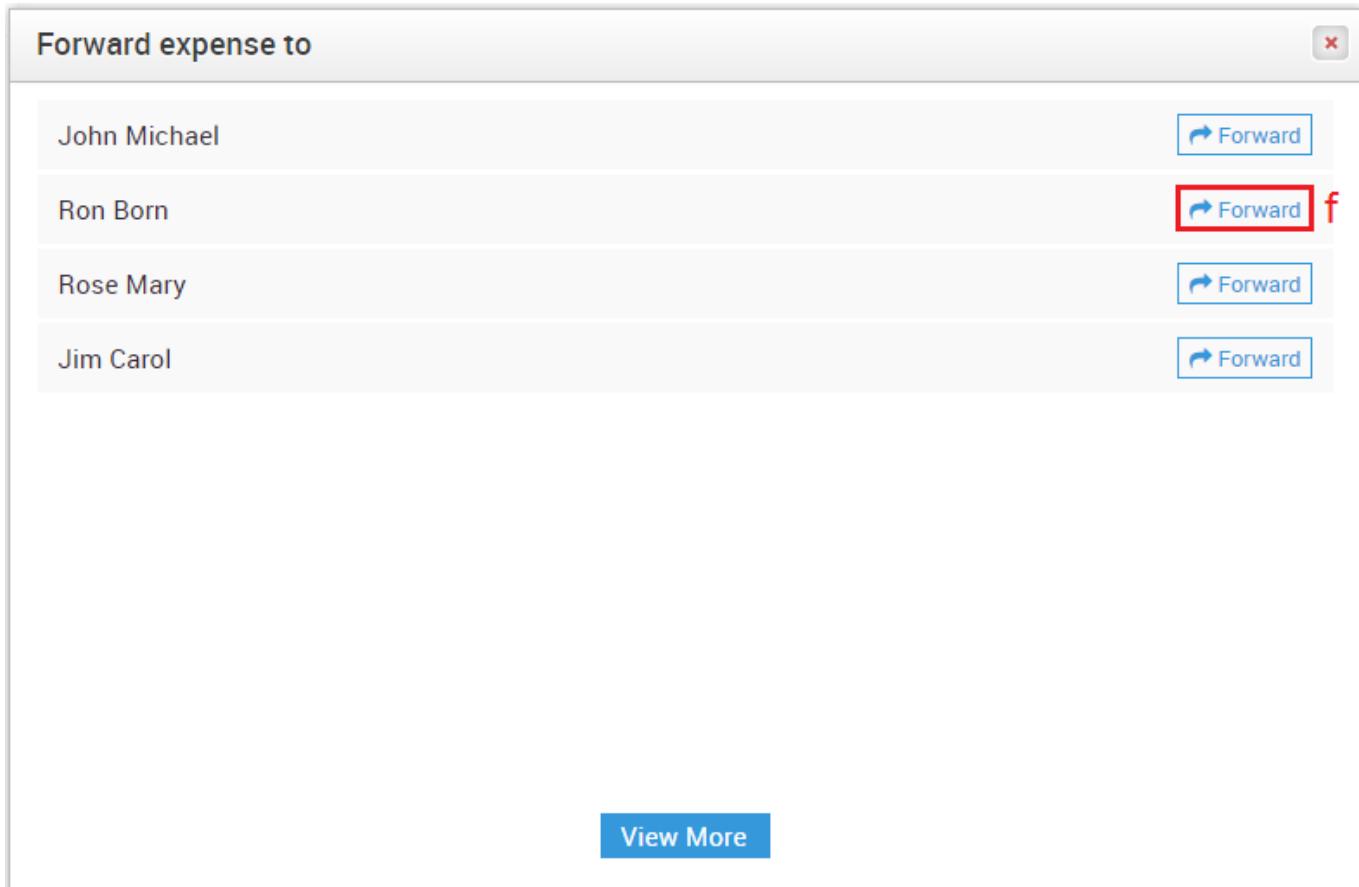


Figure 178

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

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

14.9 How do I upload Receipts?

Please refer Figure 179

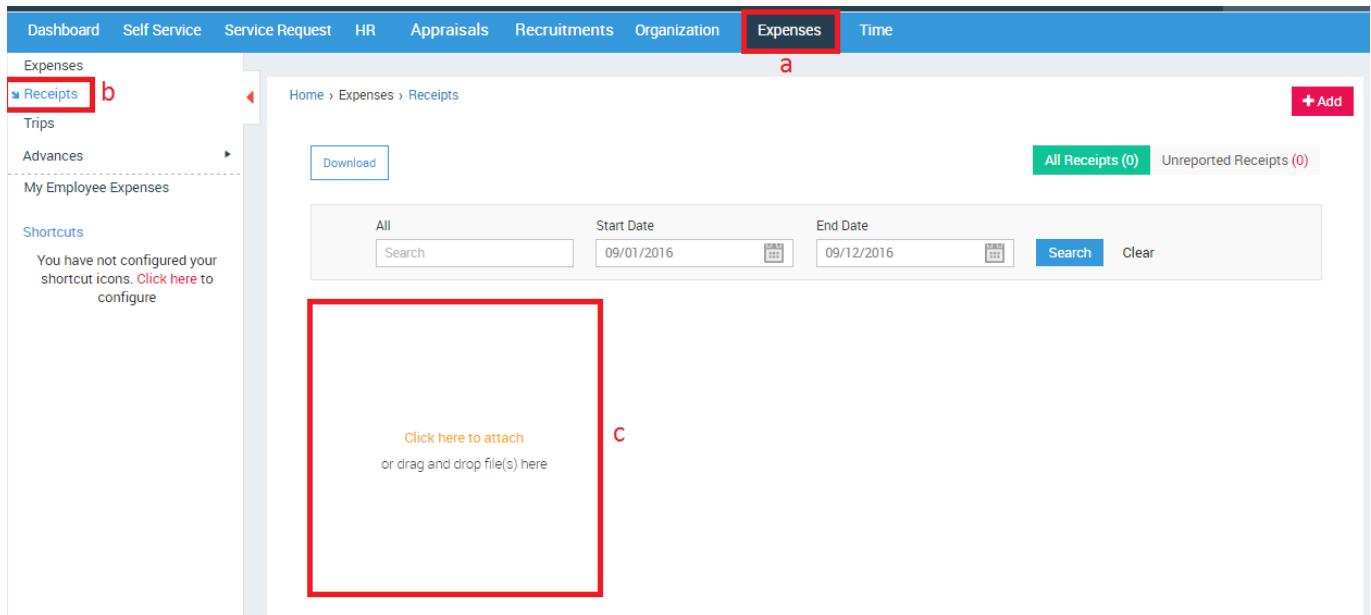


Figure 179

- 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

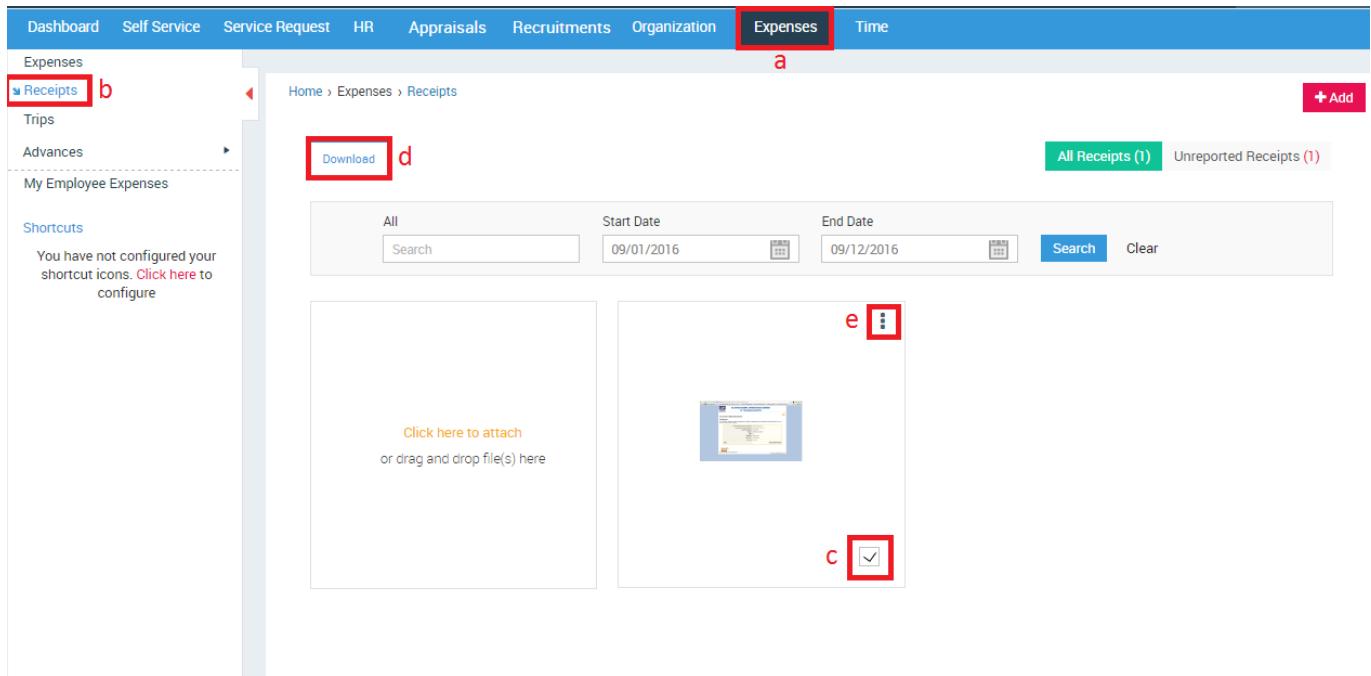


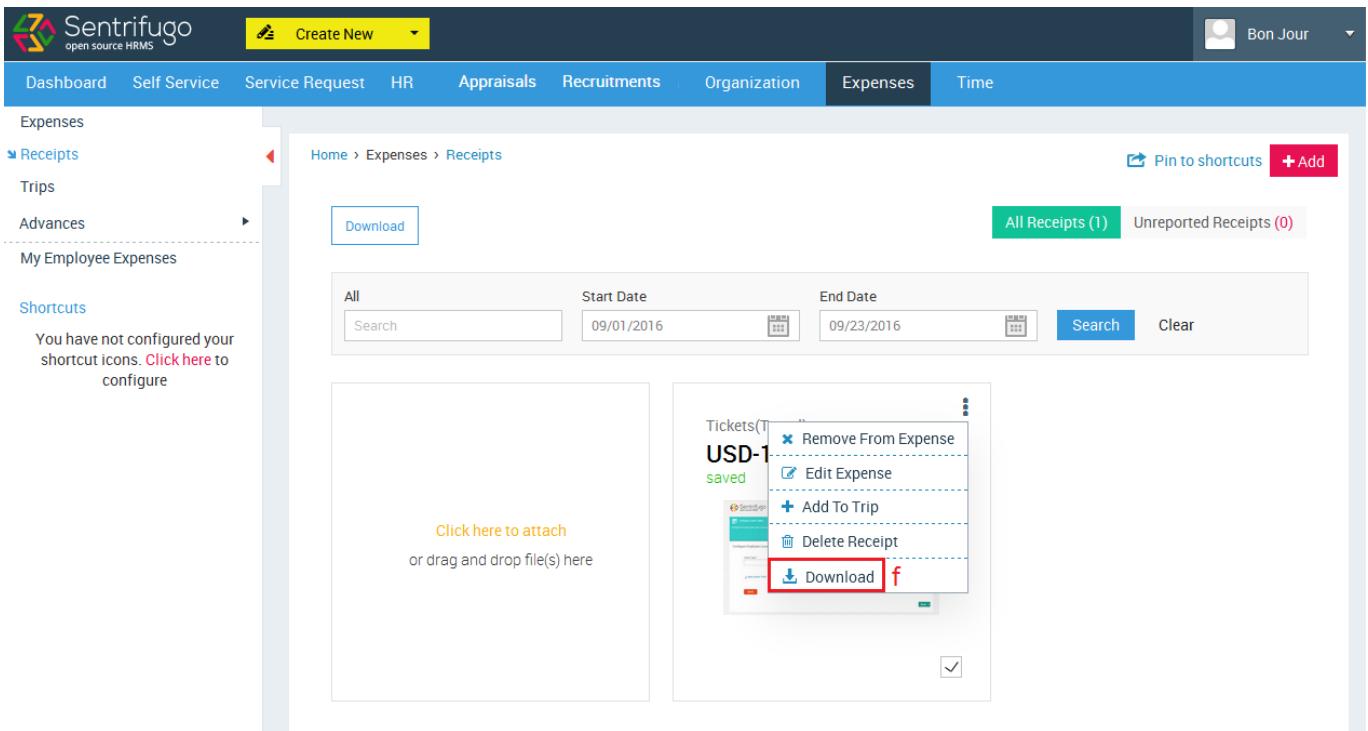
Figure 180

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

Or

- Click **More Action** icon

Please refer Figure 181



The screenshot shows the Sentrifugo web interface for managing expenses. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (selected), and Time. A user profile icon and the text "Bon Jour" are also present. On the left, a sidebar lists Expenses, Receipts (selected), Trips, Advances, and My Employee Expenses. Under Receipts, there's a note about未配置快捷图标. The main content area shows a breadcrumb path: Home > Expenses > Receipts. It features a search bar and filters for Start Date (09/01/2016) and End Date (09/23/2016). Below this, there are two columns: one for attachments and another for a receipt item labeled "USD-1 saved". A context menu is open over the receipt item, with the "Download" option highlighted with a red box.

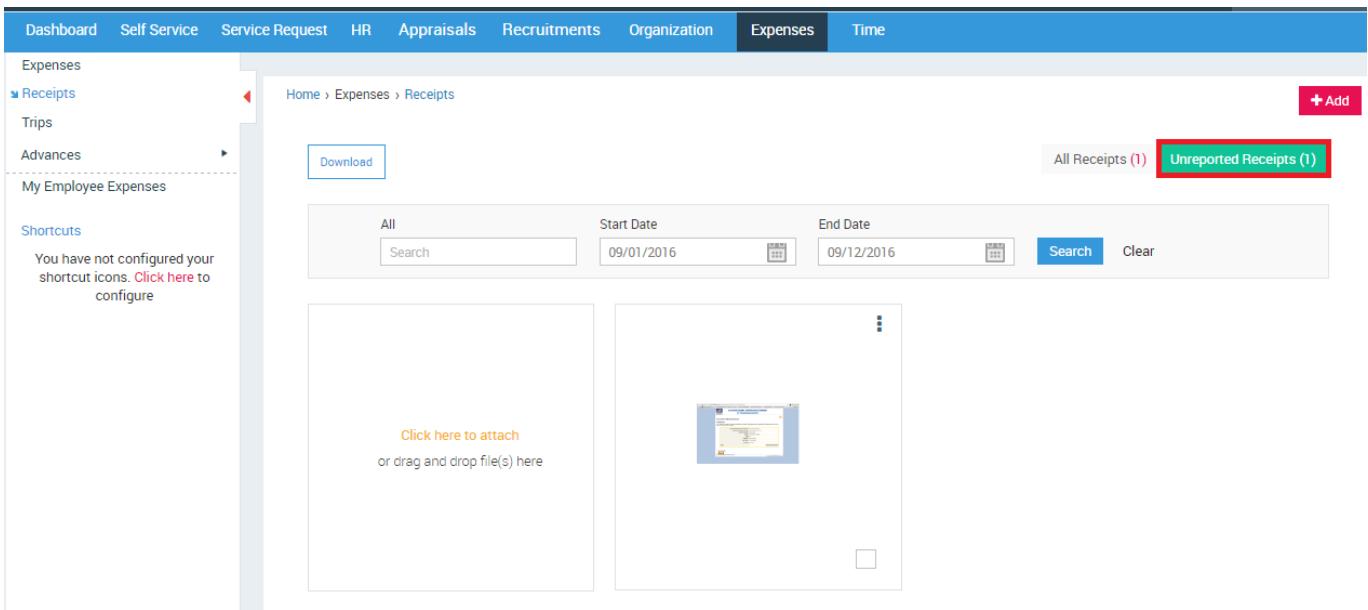
Figure 181

f. Select Download

14.11 What are Unreported Receipts?

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

Please refer Figure 182



This screenshot shows the same Sentrifugo interface as Figure 181, but with a different focus. The "Unreported Receipts" tab is highlighted with a red box in the top right corner of the main content area. The rest of the interface is identical to Figure 181, including the sidebar, breadcrumb path, and receipt details.

Figure 182

14.12 How do I add Receipts to Expenses/Trips?

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

Please refer Figure 183

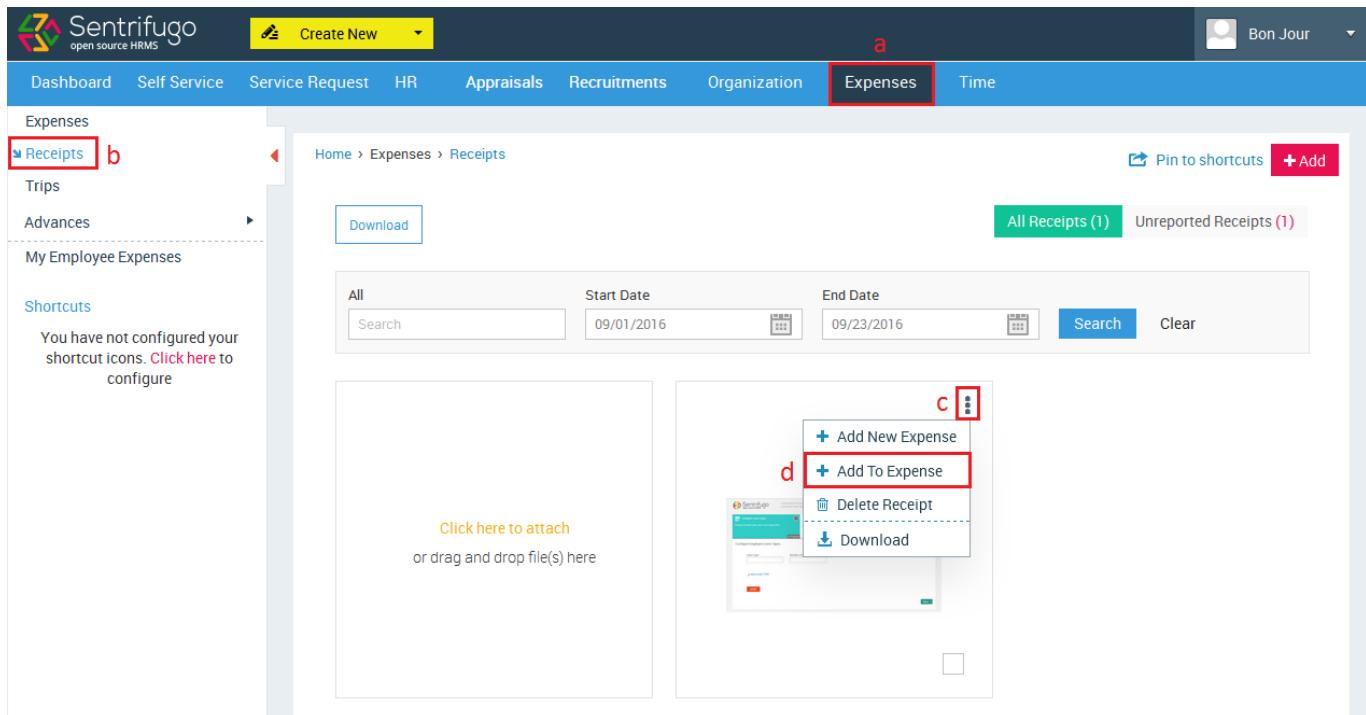


Figure 183

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

A small pop up window will open.

Please refer Figure 184

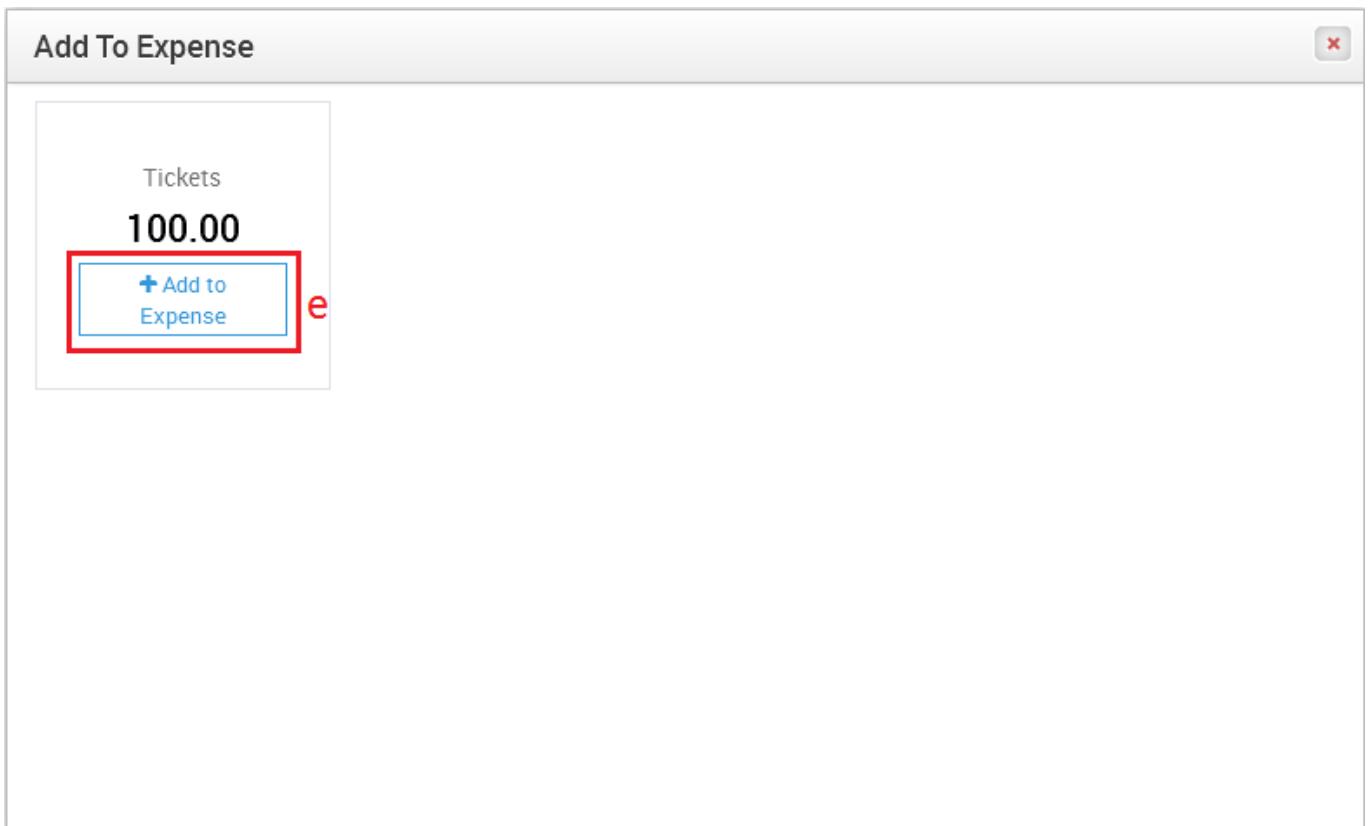
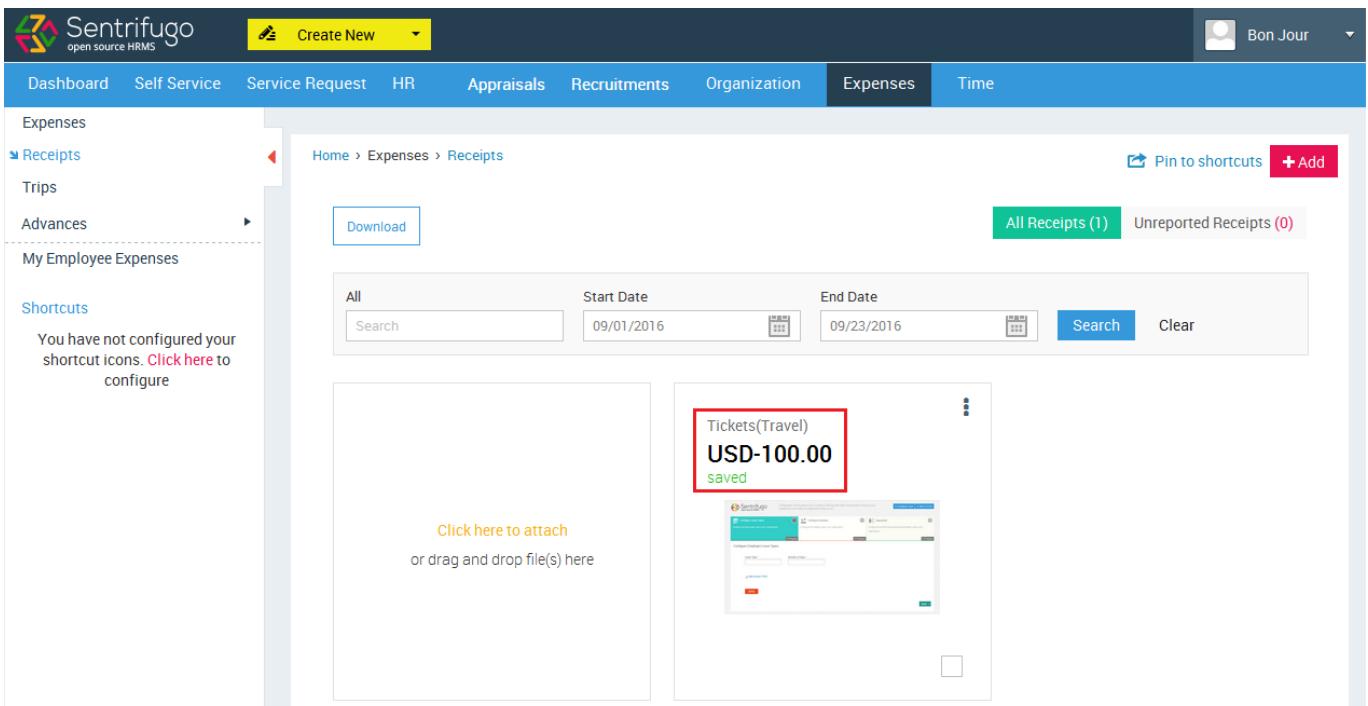


Figure 184

e. Click Add to Expense.

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



The screenshot shows the "Expenses" section of the Sentrifugo interface. On the left sidebar, "Receipts" is selected. The main area displays a receipt for "Tickets(Travel)" worth "USD-100.00" which is marked as "saved". Below the receipt, there's a note saying "Click here to attach or drag and drop file(s) here". The top navigation bar includes links for "Create New", "Bon Jour", and other modules like "Dashboard", "Self Service", "Service Request", "HR", "Appraisals", "Recruitments", "Organization", "Time", and "Expenses".



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

14.13 How do I delete a Receipt?

Please refer Figure 185

Figure 185

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

A confirmation message will be displayed.

Please refer Figure 186

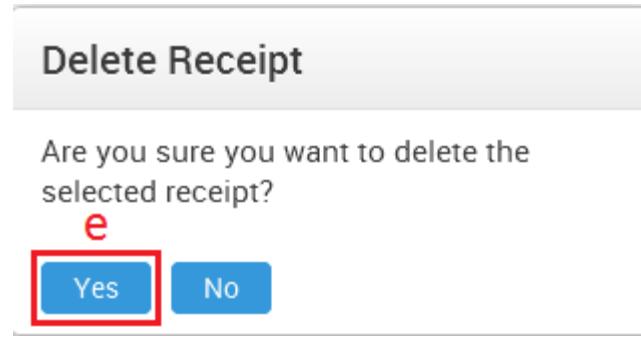


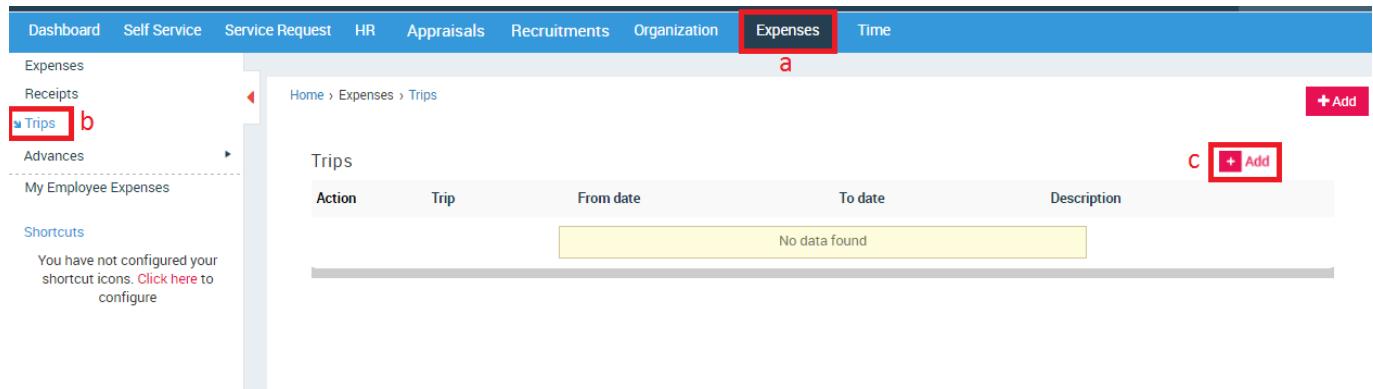
Figure 186

- 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

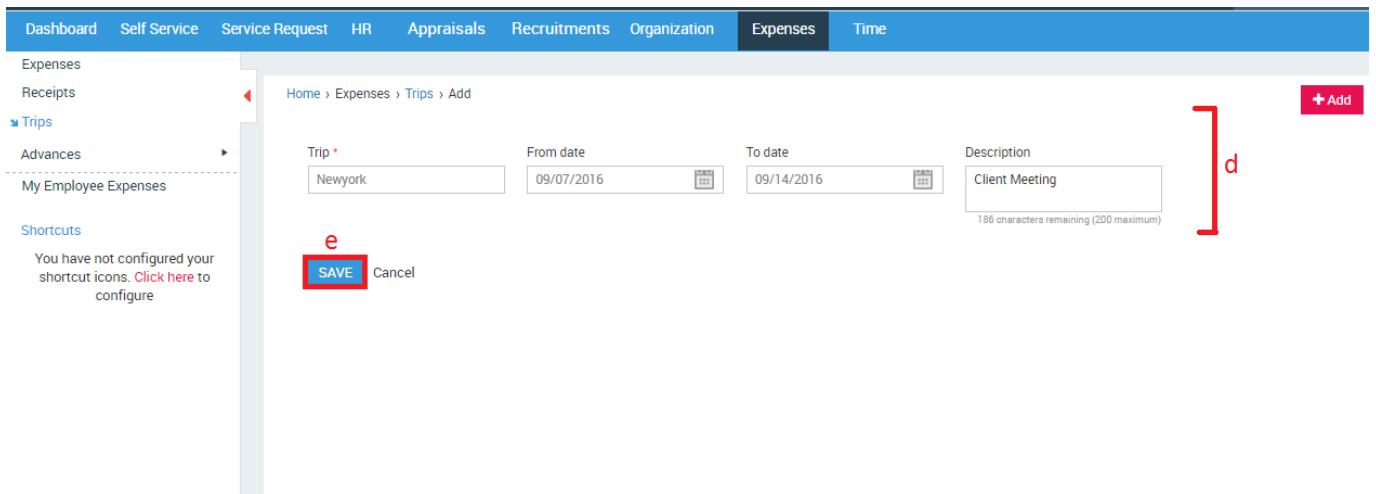


The image shows the "Trips" management screen in the Sentrifugo application. The top navigation bar has a "Trips" button highlighted with a red box and labeled 'b'. The main content area shows a table with columns: Action, Trip, From date, To date, and Description. A message "No data found" is displayed in the table body. On the right side of the table, there is a "+ Add" button highlighted with a red box and 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' is set to '09/07/2016' and the 'To date' is '09/14/2016'. The 'Description' field contains 'Client Meeting'. A red bracket labeled 'd' points to the 'Description' field. A red box labeled 'e' points to the 'SAVE' button.

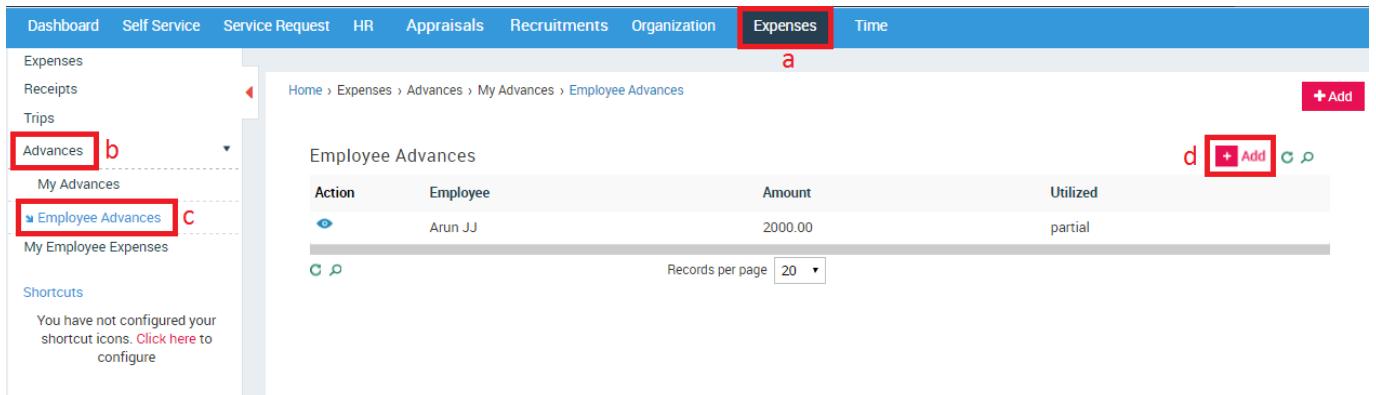
Figure 188

- 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



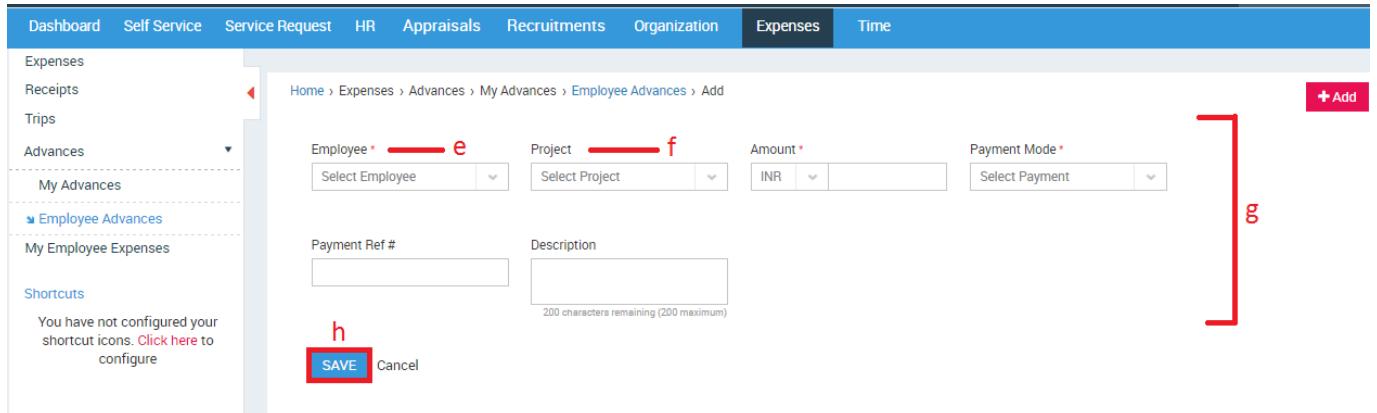
The screenshot shows the 'Employee Advances' list in the Sentrifugo Expenses module. The table has columns: Action, Employee, Amount, and Utilized. One row shows Arun JJ with an amount of 2000.00 and utilization status as partial. A red bracket labeled 'a' points to the top menu 'Expenses'. A red box labeled 'b' points to the 'Advances' menu item. A red box labeled 'c' points to the 'Employee Advances' submenu item. A red box labeled 'd' points to the '+Add' button.

Action	Employee	Amount	Utilized
	Arun JJ	2000.00	partial

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



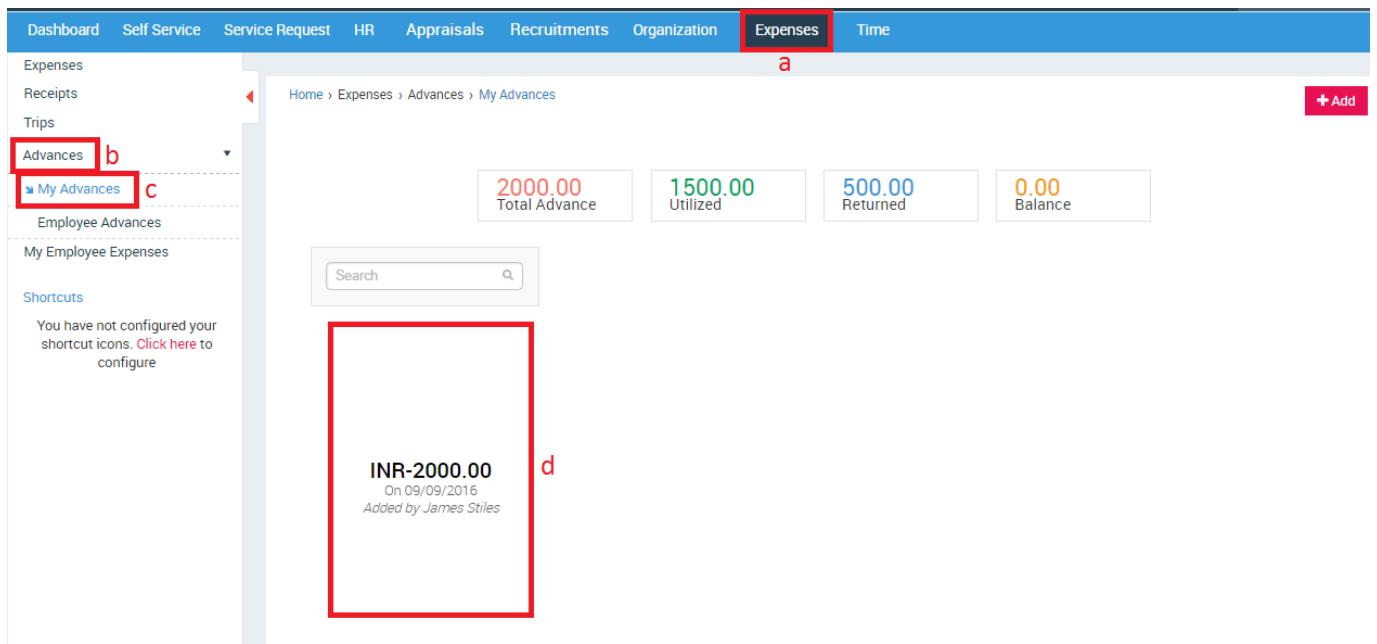
The screenshot shows the 'Employee Advances' add form. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (selected), and Time. On the left, a sidebar lists 'Advances' (selected), 'Employee Advances', 'My Employee Expenses', and 'Shortcuts'. The main form has fields for Employee (dropdown, labeled e), Project (dropdown, labeled f), Amount (dropdown, labeled g), Payment Ref # (text input), Description (text input), and a 'SAVE' button (labeled h). A red bracket on the right side groups the Payment Mode dropdown and the SAVE button.

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



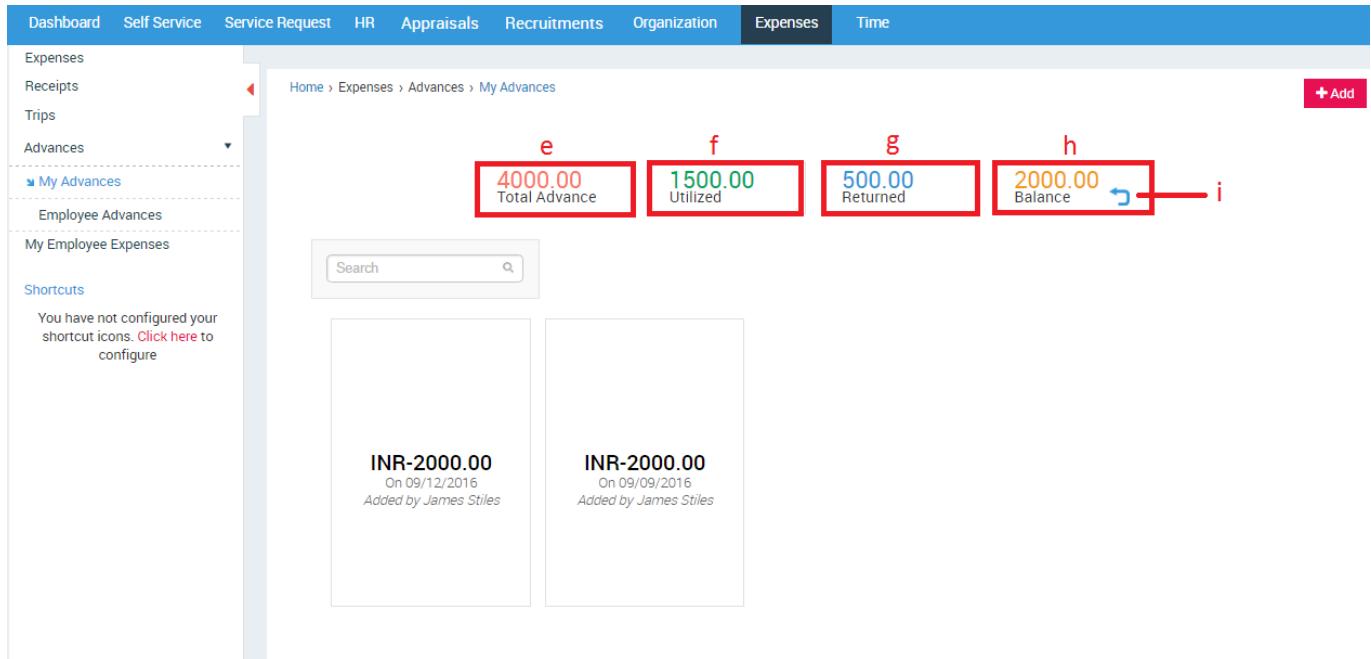
The screenshot shows the 'My Advances' list page. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (selected), and Time. The sidebar shows 'Advances' (selected) and 'My Advances' (highlighted with a red box). The 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 box highlights the 'Total Advance' value. A red bracket on the right covers the 'My Advances' link in the sidebar and the 'Total Advance' value.

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 'Expenses' section of the Sentrifugo HRMS interface. On the left, a sidebar lists 'Advances' with a sub-item 'My Advances' selected. The main content area shows a summary of advance amounts:

- e. **4000.00** Total Advance
- f. **1500.00** Utilized
- g. **500.00** Returned
- h. **2000.00** Balance

Below this summary, there is a search bar and two cards showing individual advance entries:

- 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

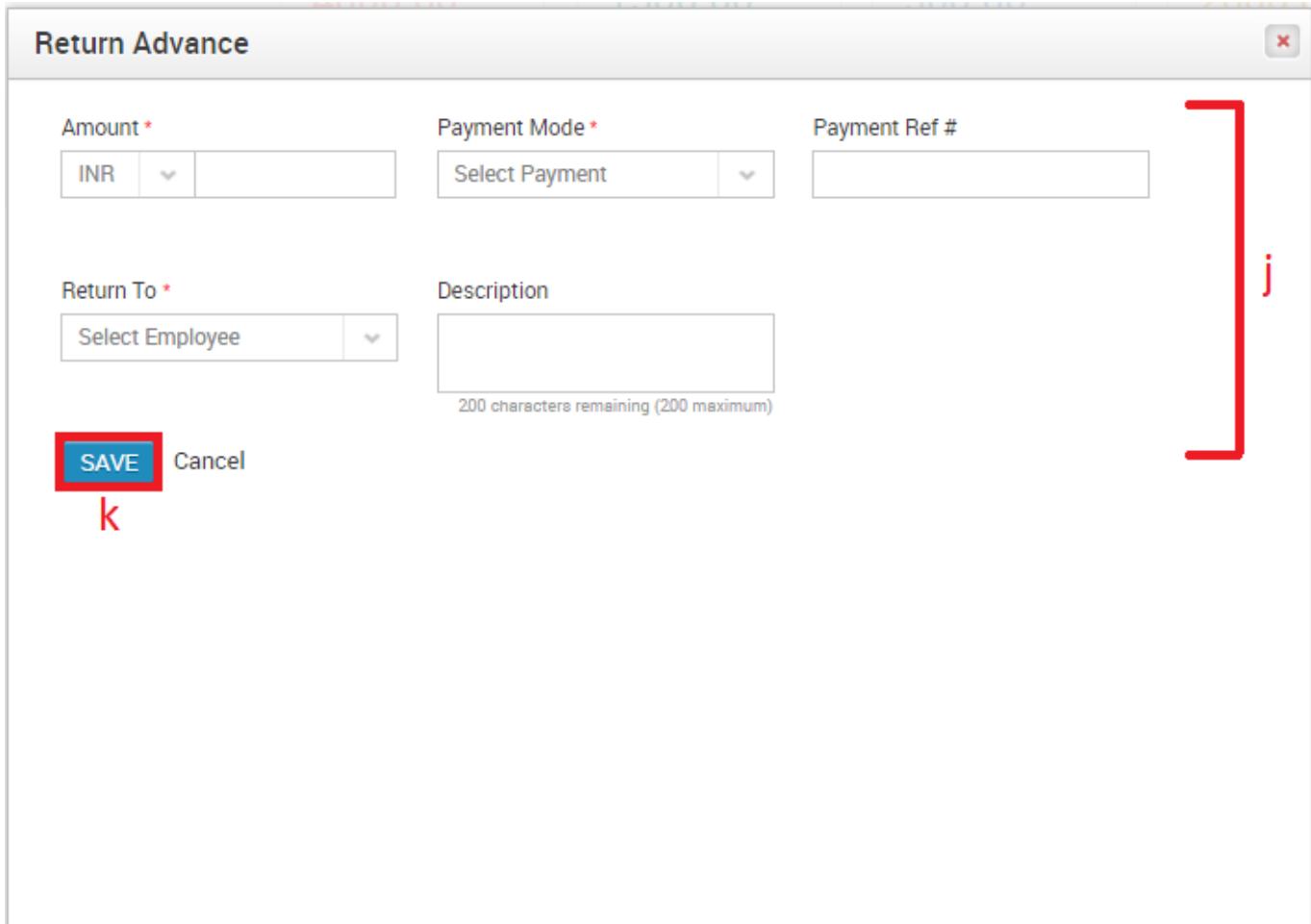
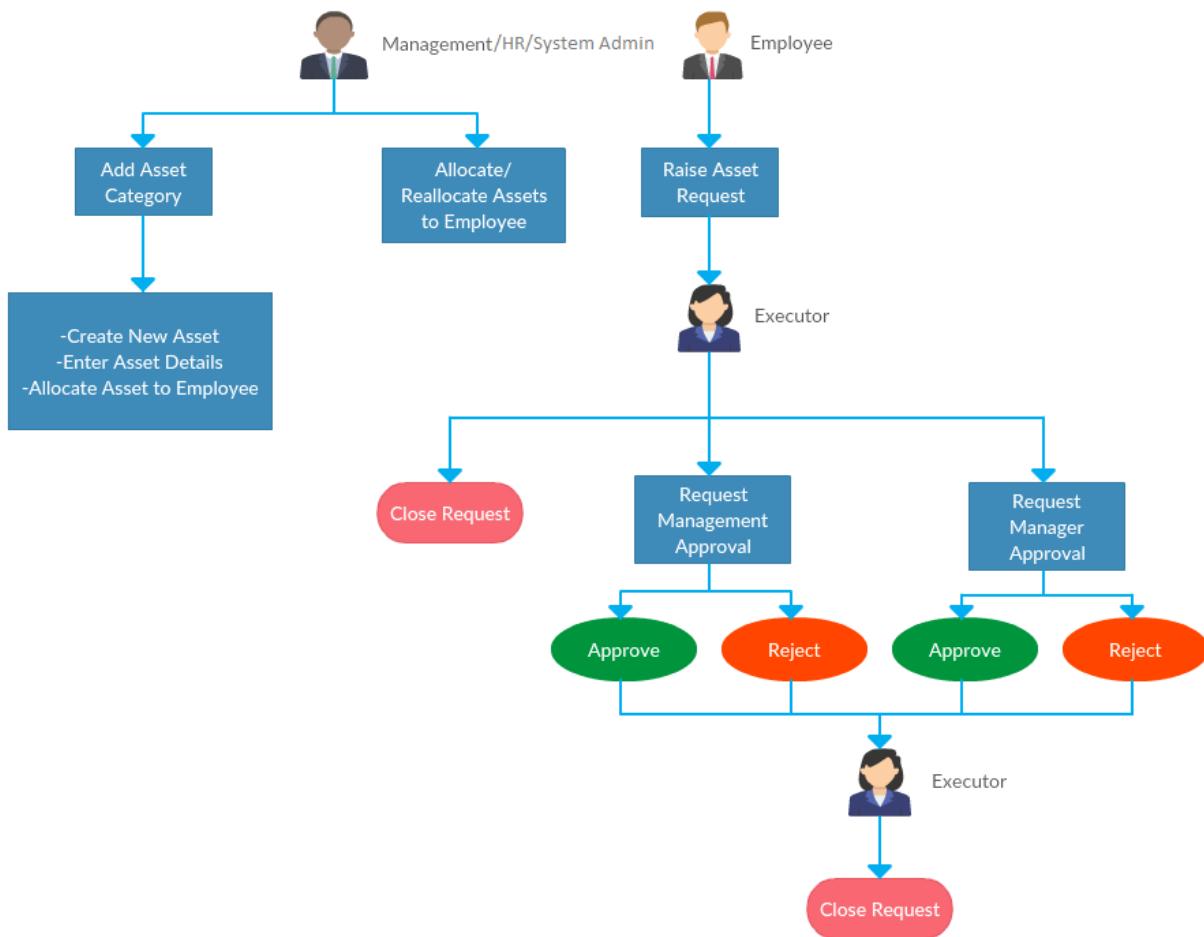


Figure 193

- 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.



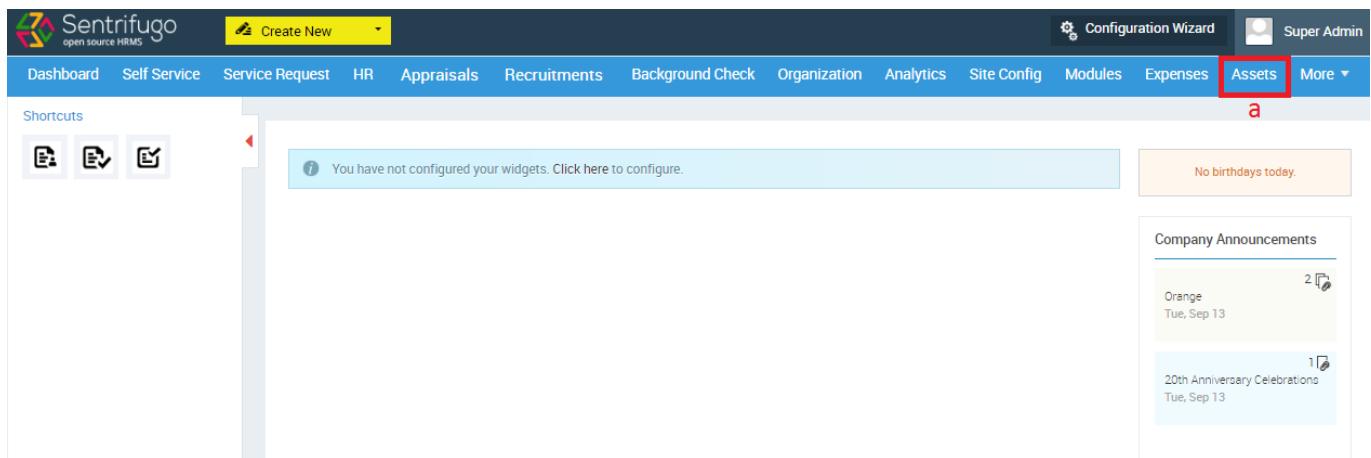
Process Description:

- 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

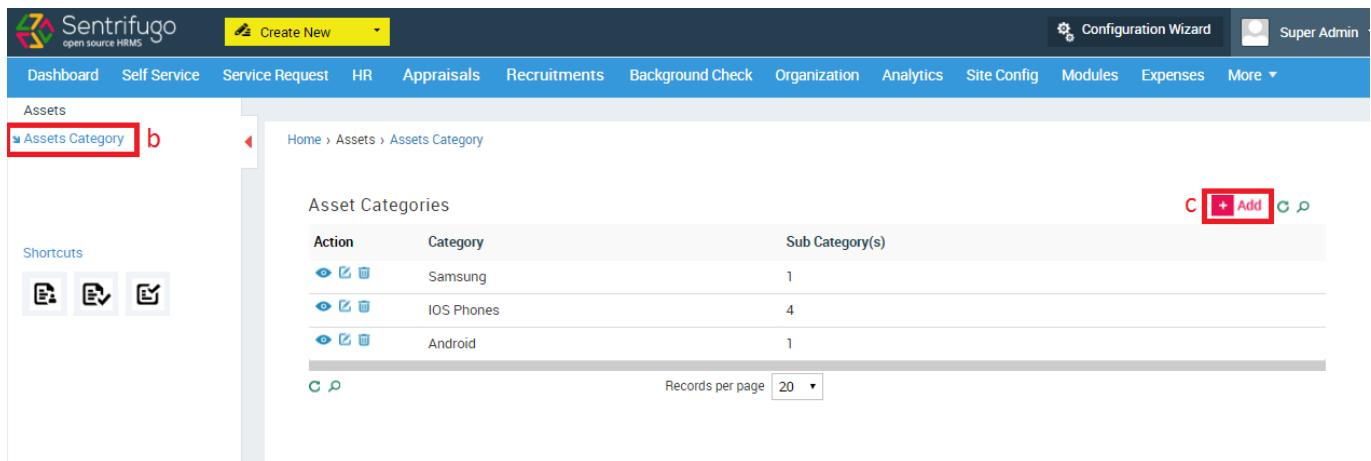


The screenshot shows the Sentrifugo web application interface. At the top, there is a dark header bar with the Sentrifugo logo and the text "open source HRMS". To the right of the logo are several links: "Create New", "Configuration Wizard", and "Super Admin". Below the header is a main navigation menu with items: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, Expenses, Assets (which is highlighted with a red box and labeled 'a'), and More. Under the "Assets" menu item, there is a sub-menu titled "Company Announcements" which lists two items: "Orange" (Tue, Sep 13) and "20th Anniversary Celebrations" (Tue, Sep 13). On the left side of the page, there is a sidebar with icons for "Assets", "Self Service", and "Service Request". A message box in the center says, "You have not configured your widgets. Click here to configure." There are also three small icons at the bottom of the sidebar.

Figure 194

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

Please refer Figure 195



The screenshot shows the "Assets Category" page within the Sentrifugo application. At the top, it features the same header and navigation bar as Figure 194. The main content area is titled "Asset Categories" and contains a table with the following data:

Action	Category	Sub Category(s)
	Samsung	1
	IOS Phones	4
	Android	1

At the bottom of the table, there are buttons for "Records per page" (set to 20) and "C P". To the right of the table, there are three small icons: a red square with a white plus sign (labeled 'b'), a green square with a white plus sign, and a blue square with a white plus sign. The URL in the browser's address bar shows the path: "Home > Assets > Assets Category".

Figure 195

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

Please refer Figure 196

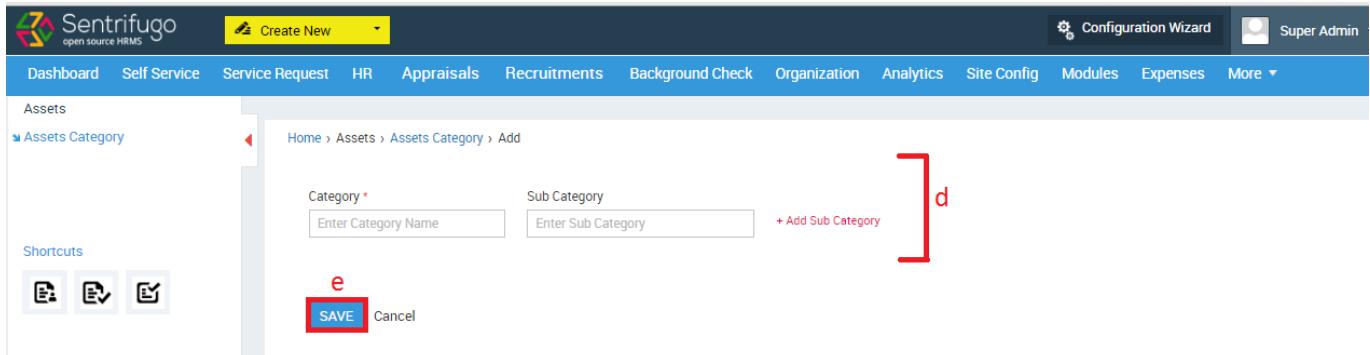


Figure 196

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

15.2 How do I add an Asset?

Please refer Figure 197

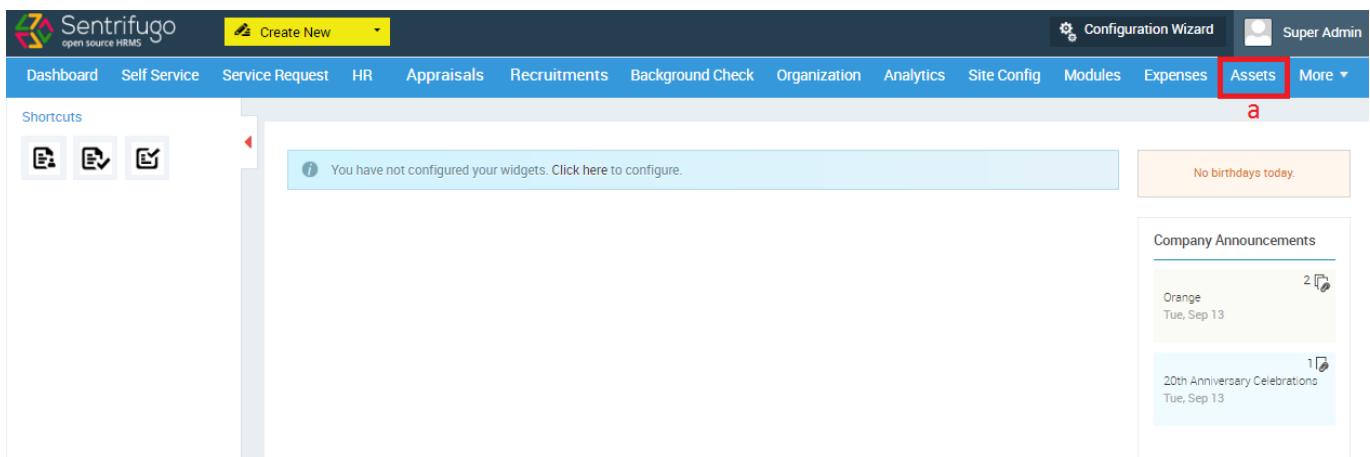
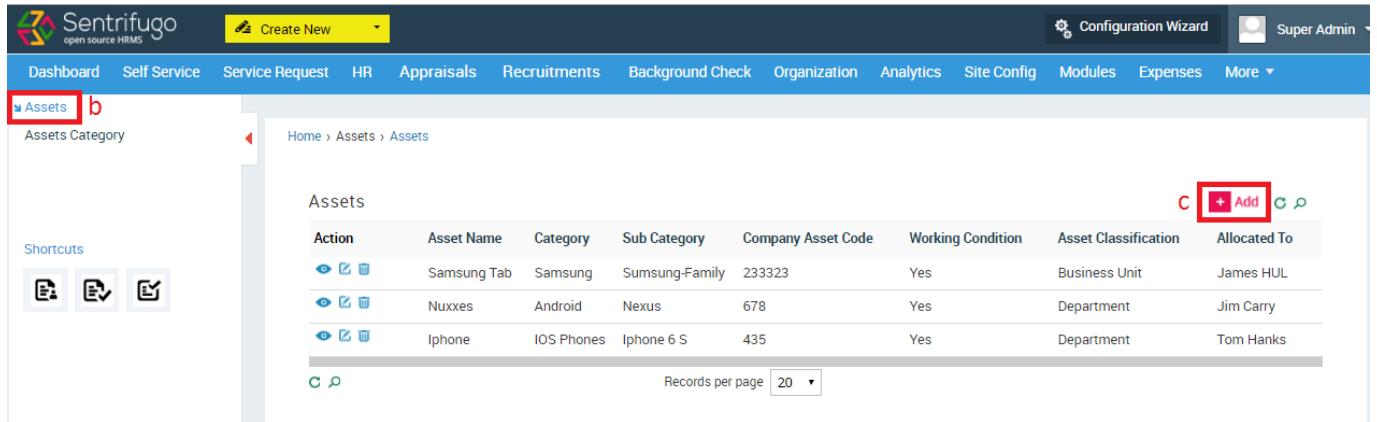


Figure 197

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

Please refer Figure 198

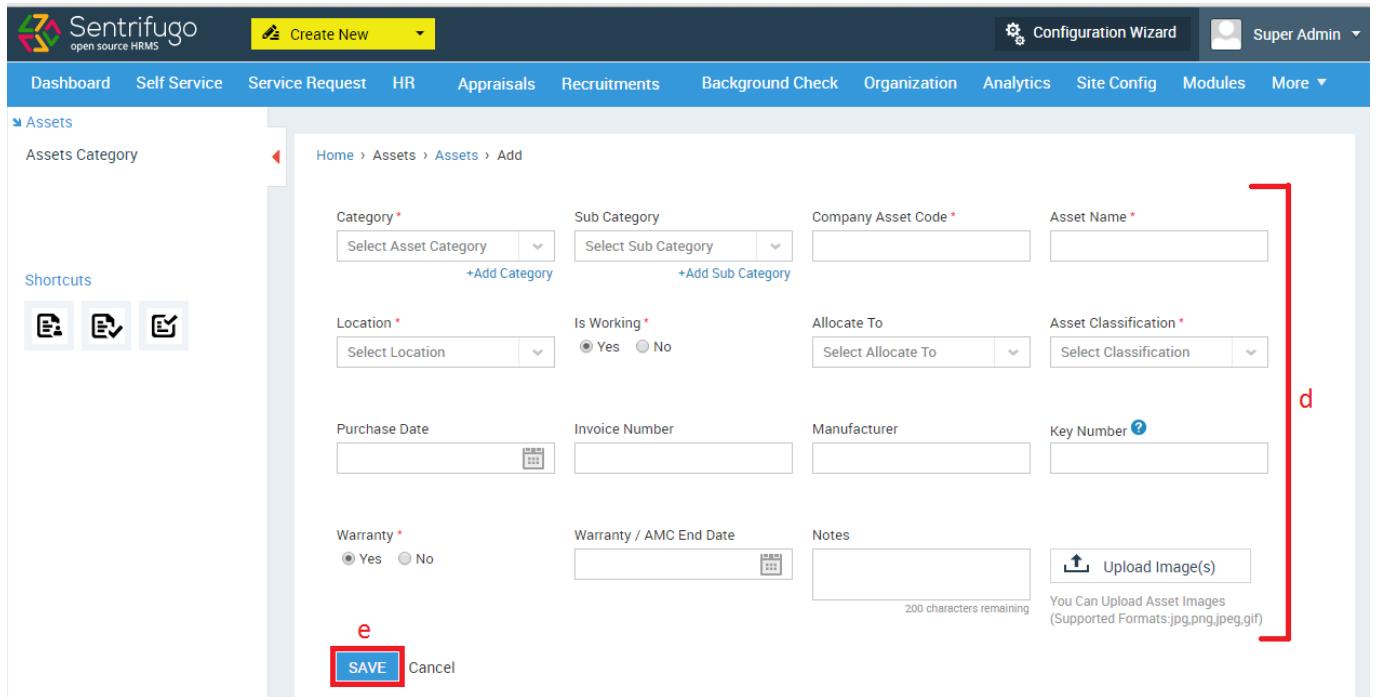


Action	Asset Name	Category	Sub Category	Company Asset Code	Working Condition	Asset Classification	Allocated To
	Samsung Tab	Samsung	Sumsung-Family	233323	Yes	Business Unit	James HUL
	Nuxxes	Android	Nexus	678	Yes	Department	Jim Carry
	Iphone	IOS Phones	Iphone 6 S	435	Yes	Department	Tom Hanks

Figure 198

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

Please refer Figure 199



Category * Select Asset Category

Sub Category Select Sub Category

Company Asset Code *

Asset Name *

Location * Select Location

Is Working * Yes No

Allocate To Select Allocate To

Asset Classification * Select Classification

Purchase Date

Invoice Number

Manufacturer

Key Number

Warranty * Yes No

Warranty / AMC End Date

Notes 200 characters remaining

You Can Upload Asset Images
(Supported Formats:jpg,png,jpeg,gif)

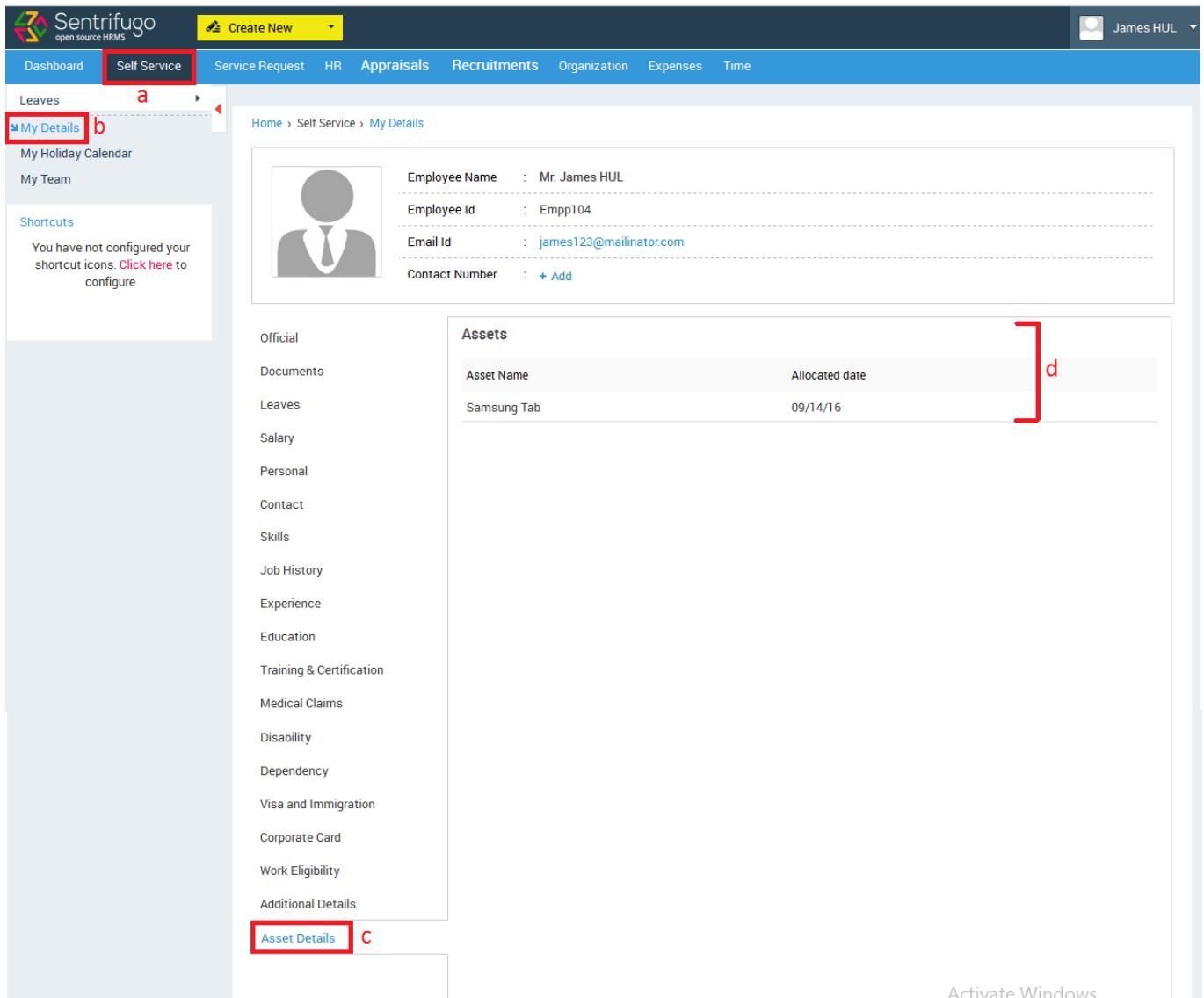
e Cancel

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 panel is titled 'My Details' (also highlighted with a red box). It contains sections for My Holiday Calendar, My Team, and Shortcuts, which lists various employee-related items 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 an 'Asset Details' button (highlighted with a red box). 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). Below this is a table titled 'Assets' with one entry: Asset Name (Samsung Tab) and Allocated date (09/14/16). A red bracket labeled 'd' spans from the 'Assets' table to the 'Additional Details' section in the sidebar.

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

Figure 200

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

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

Please refer Figure 201

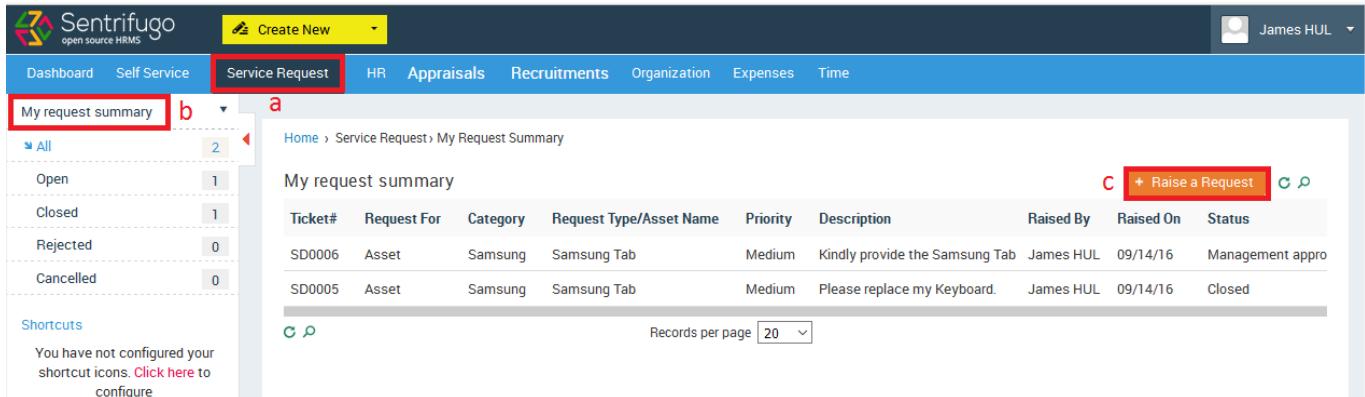


Figure 201

- 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

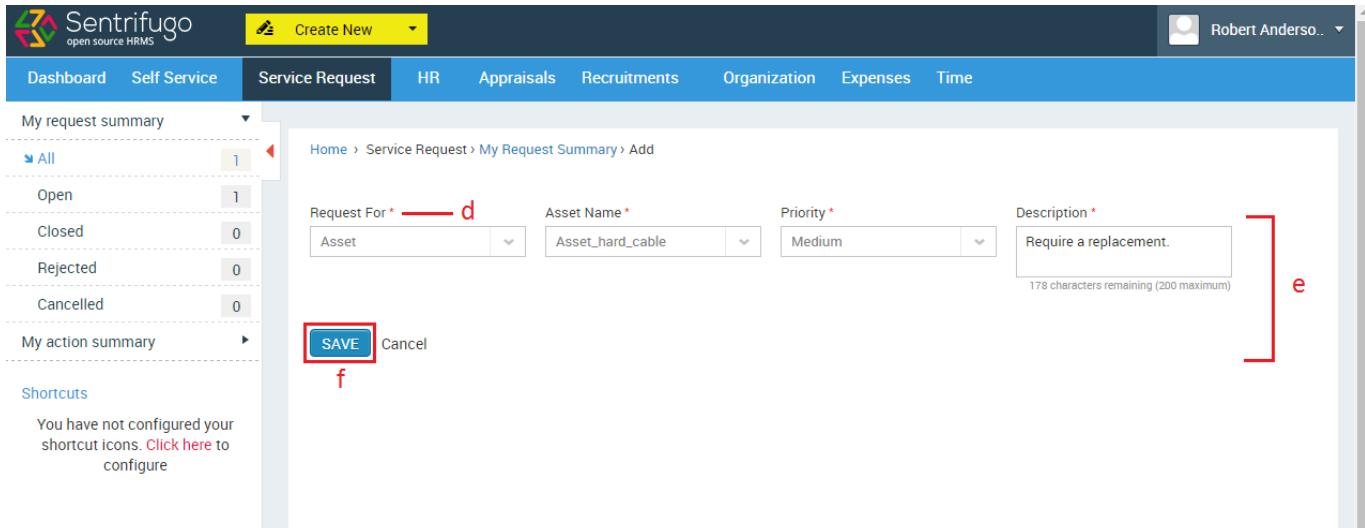


Figure 202

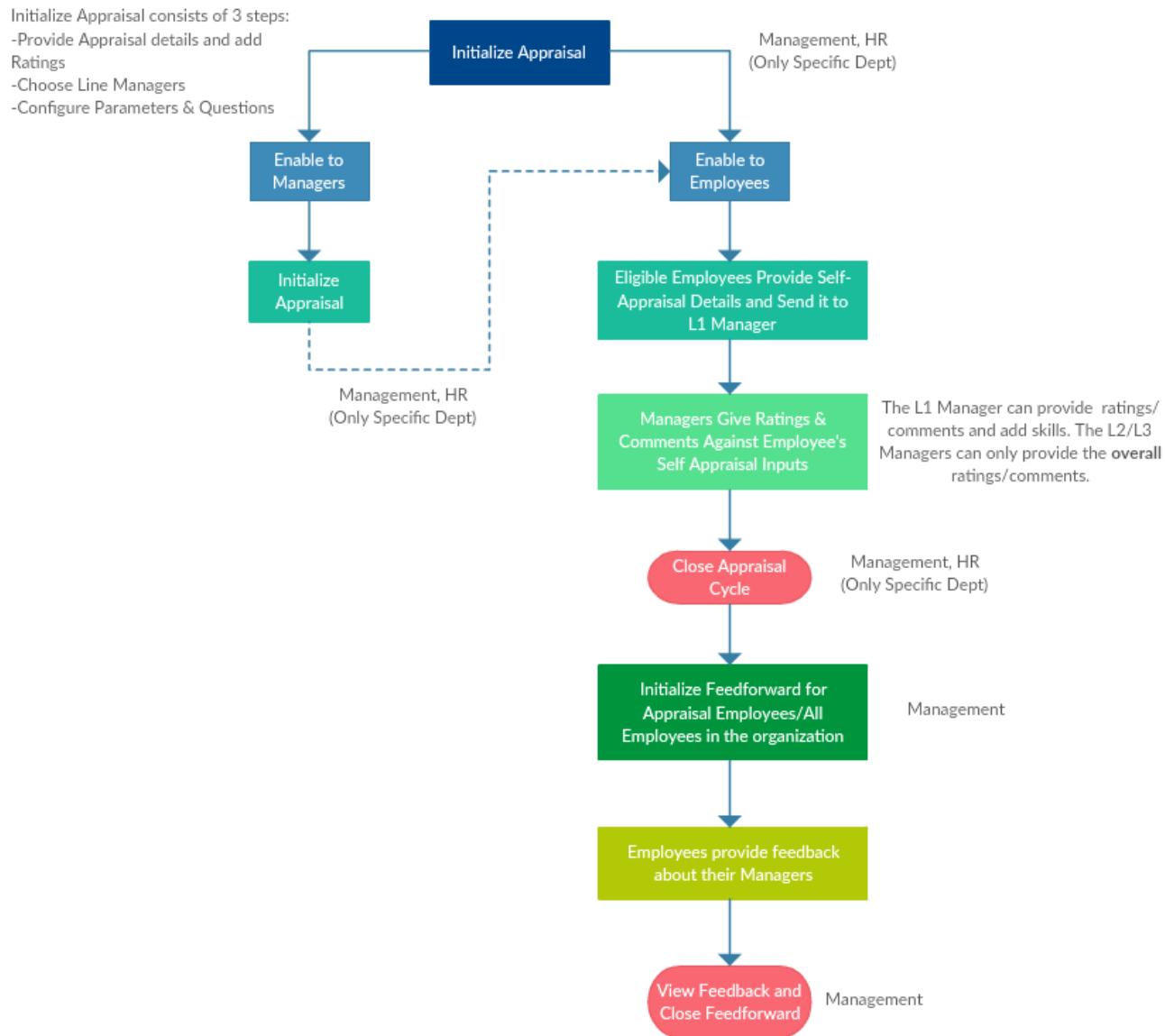
- Select **Asset** in the field 'Request For'
- Fill in the required details
- Click **SAVE** button



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:



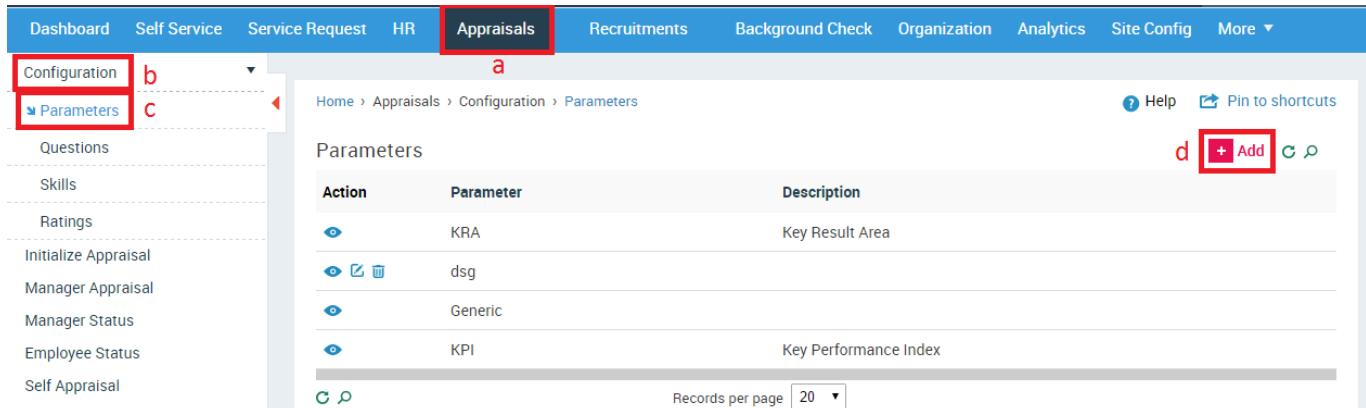
Process Description:

- 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



The screenshot shows the Sentrifugo application interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (which is highlighted in red), Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar menu lists Configuration (highlighted in red), Questions, Skills, Ratings, Initialize Appraisal, Manager Appraisal, Manager Status, Employee Status, and Self Appraisal. Under Configuration, there are sub-links for Parameters (highlighted in red) and Help. The main content area is titled 'Parameters' and shows a table with four rows:

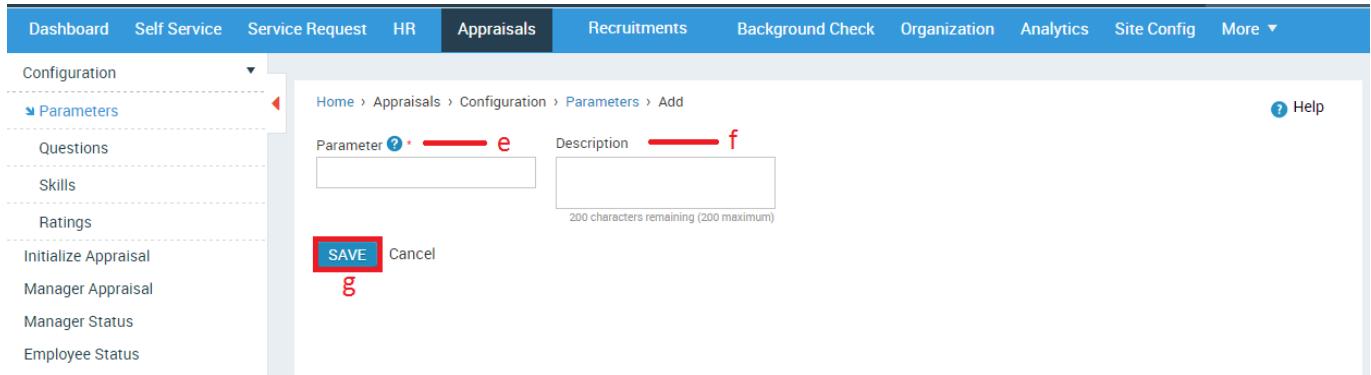
Action	Parameter	Description
Eye icon	KRA	Key Result Area
Eye icon with edit and delete icons	dsg	
Eye icon	Generic	
Eye icon	KPI	Key Performance Index

At the bottom right of the table are buttons for '+Add' (highlighted in red), 'Help', and 'Pin to shortcuts'. At the very bottom of the page are buttons for 'Records per page' (set to 20) and search.

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 HRMS interface. On the left, a sidebar menu includes 'Configuration', 'Parameters' (which is currently selected and highlighted with a red box), 'Questions', 'Skills', 'Ratings', and various appraisal-related links. The main content area shows a form for adding a parameter. It has fields for 'Parameter' (labeled e) and 'Description' (labeled f). Below the fields is a note stating '200 characters remaining (200 maximum)'. At the bottom are 'SAVE' and 'Cancel' buttons, with 'SAVE' also labeled g.

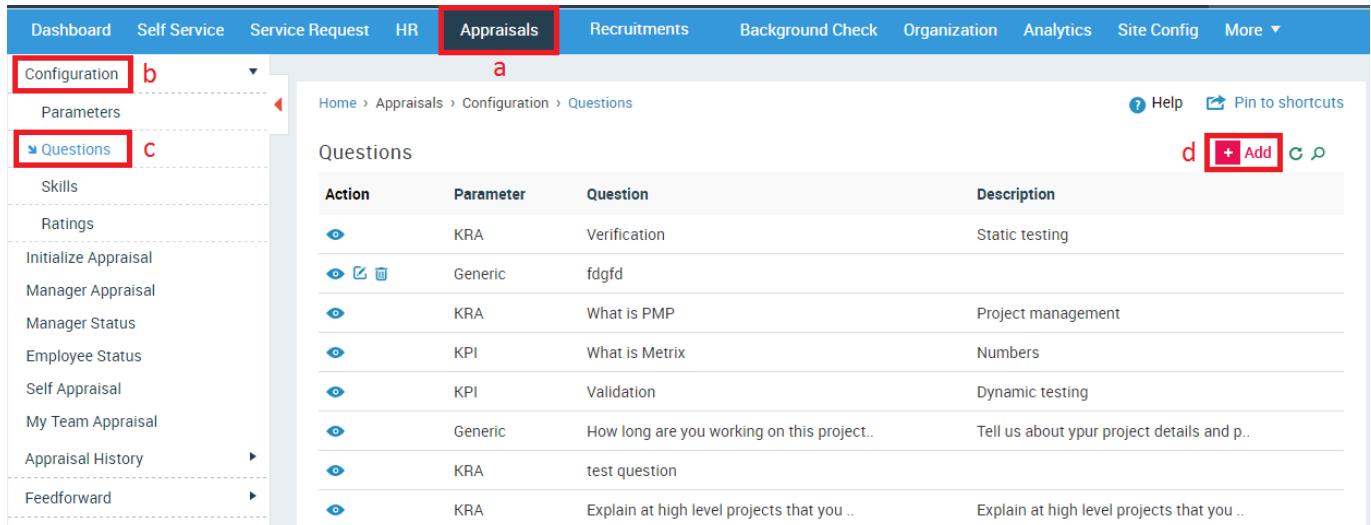
Figure 204

- 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 HRMS interface. The left sidebar menu includes 'Configuration' (labeled b), 'Parameters', and 'Questions' (which is currently selected and highlighted with a red box). The main content area displays a table of questions. The columns are 'Action', 'Parameter', 'Question', and 'Description'. The table contains several rows of questions, each with edit and delete icons. A red box highlights the 'Add' button (labeled d) at the top right of the table. The right side of the screen shows a toolbar with 'Help', 'Pin to shortcuts', and other icons.

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 ..

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

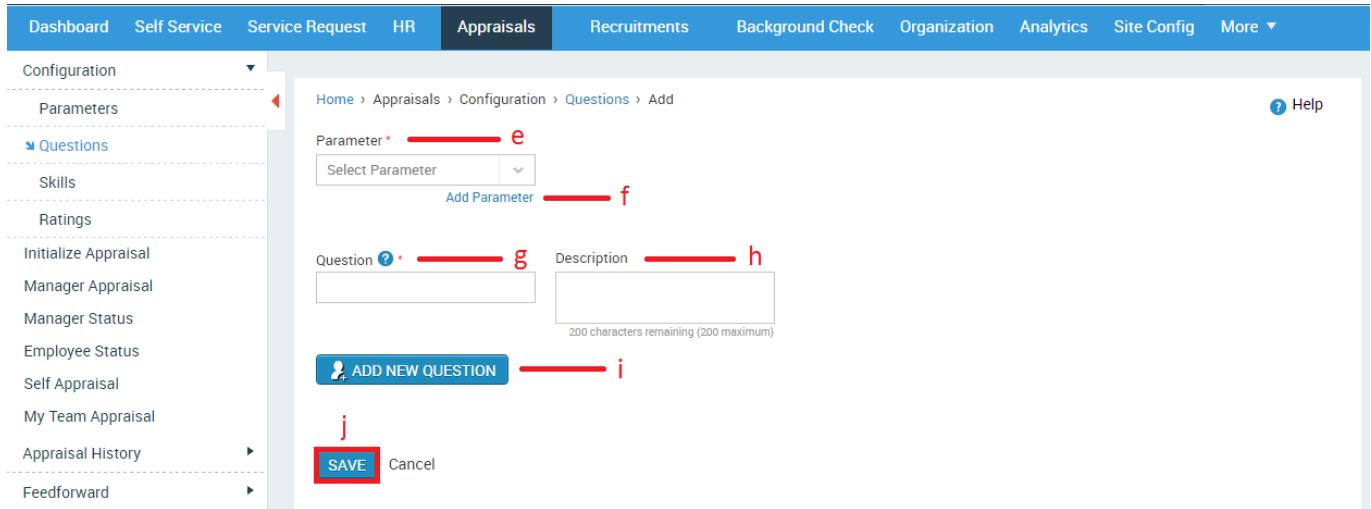


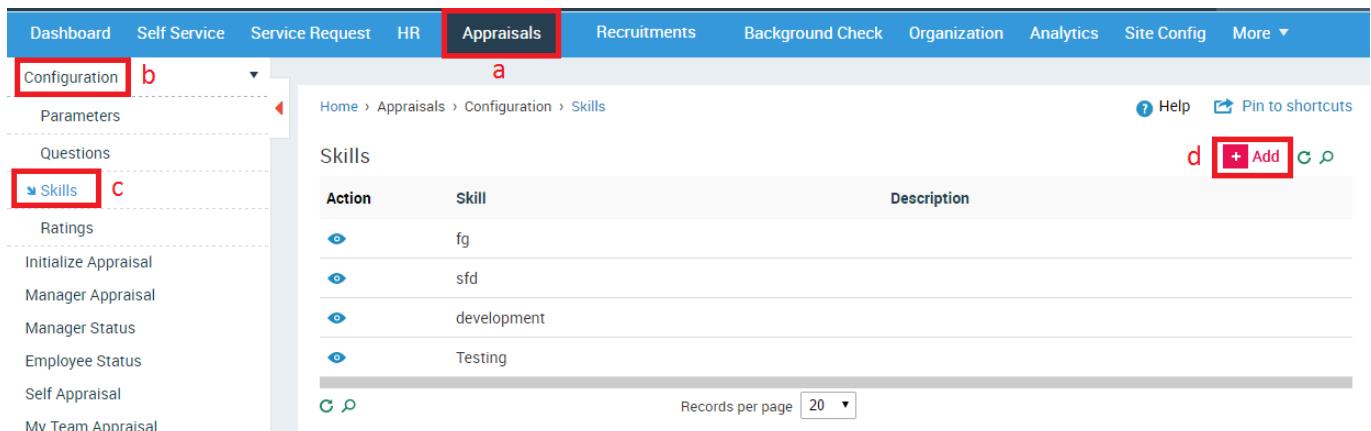
Figure 206

- 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



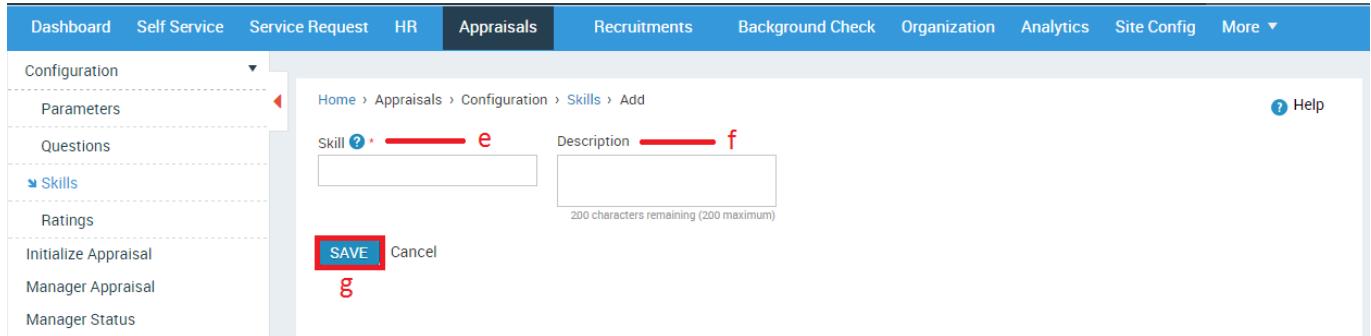
Action	Skill	Description
fg		
sfd		
development		
Testing		

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' with sub-options: 'Parameters', 'Questions', 'Skills' (which is selected and highlighted in blue), 'Ratings', 'Initialize Appraisal', 'Manager Appraisal', and 'Manager Status'. The main content area shows a breadcrumb path: Home > Appraisals > Configuration > Skills > Add. It contains fields for 'Skill' (with placeholder 'e') and 'Description' (with placeholder 'f'). A note says '200 characters remaining (200 maximum)'. At the bottom are 'SAVE' and 'Cancel' buttons, with 'g' pointing to the 'SAVE' button.

Figure 208

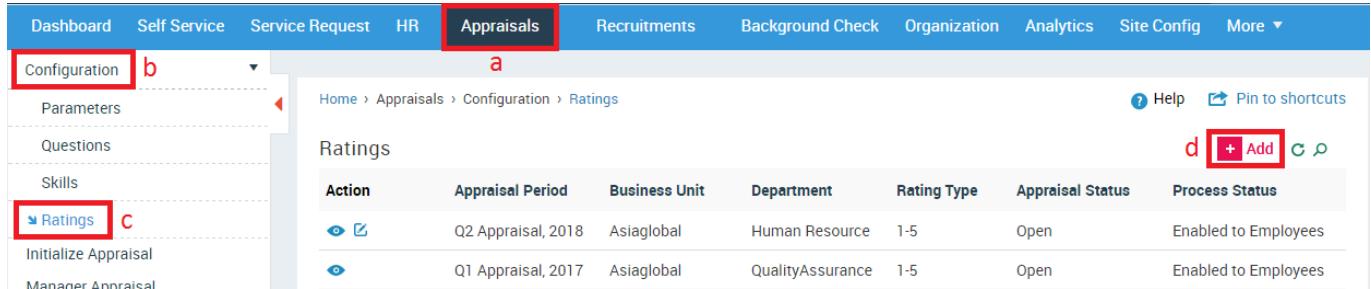
- e. Enter the skill
- f. Provide description if necessary
- g. Click **SAVE** button

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

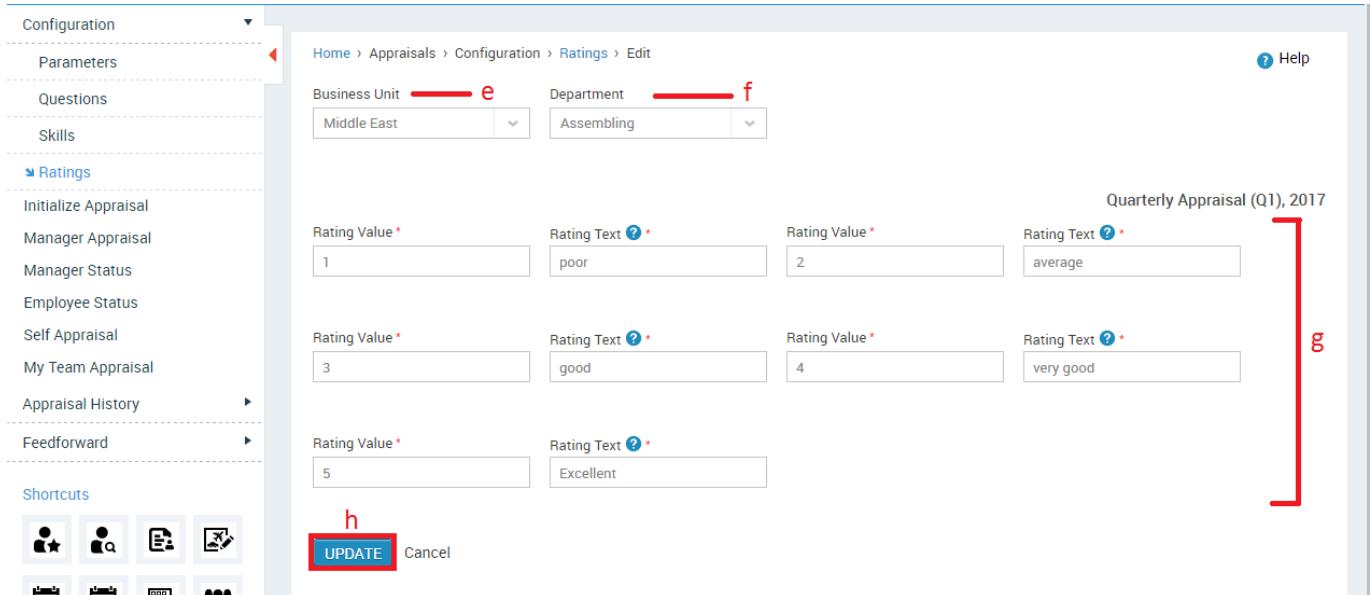


The screenshot shows the 'Appraisals' section of the Sentrifugo interface. On the left, a sidebar lists 'Configuration' with sub-options: 'Parameters', 'Questions', 'Skills', 'Ratings' (which is selected and highlighted in blue), 'Initialize Appraisal', and 'Manager Appraisal'. The main content area 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 Human Resource and 'Q1 Appraisal, 2017' for Quality Assurance. On the right, there are 'Edit' (highlighted in red), 'Add' (highlighted in red), and 'Delete' icons. A note says 'Pin to shortcuts'.

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 **e**

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

Help

UPDATE Cancel

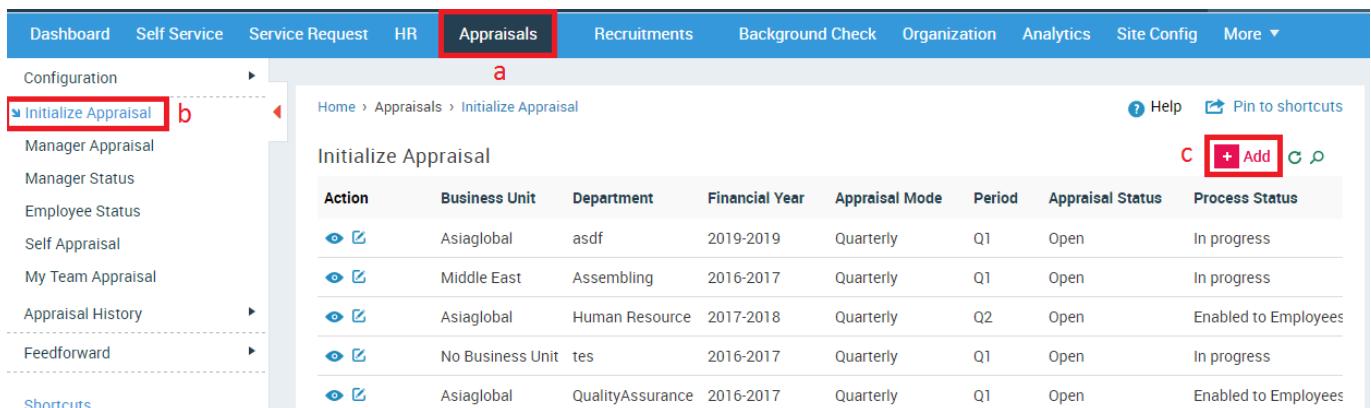
Figure 210

- 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 **a** **b**

Manager Appraisal

Manager Status

Employee Status

Self Appraisal

My Team Appraisal

Appraisal History

Feedforward

Shortcuts

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

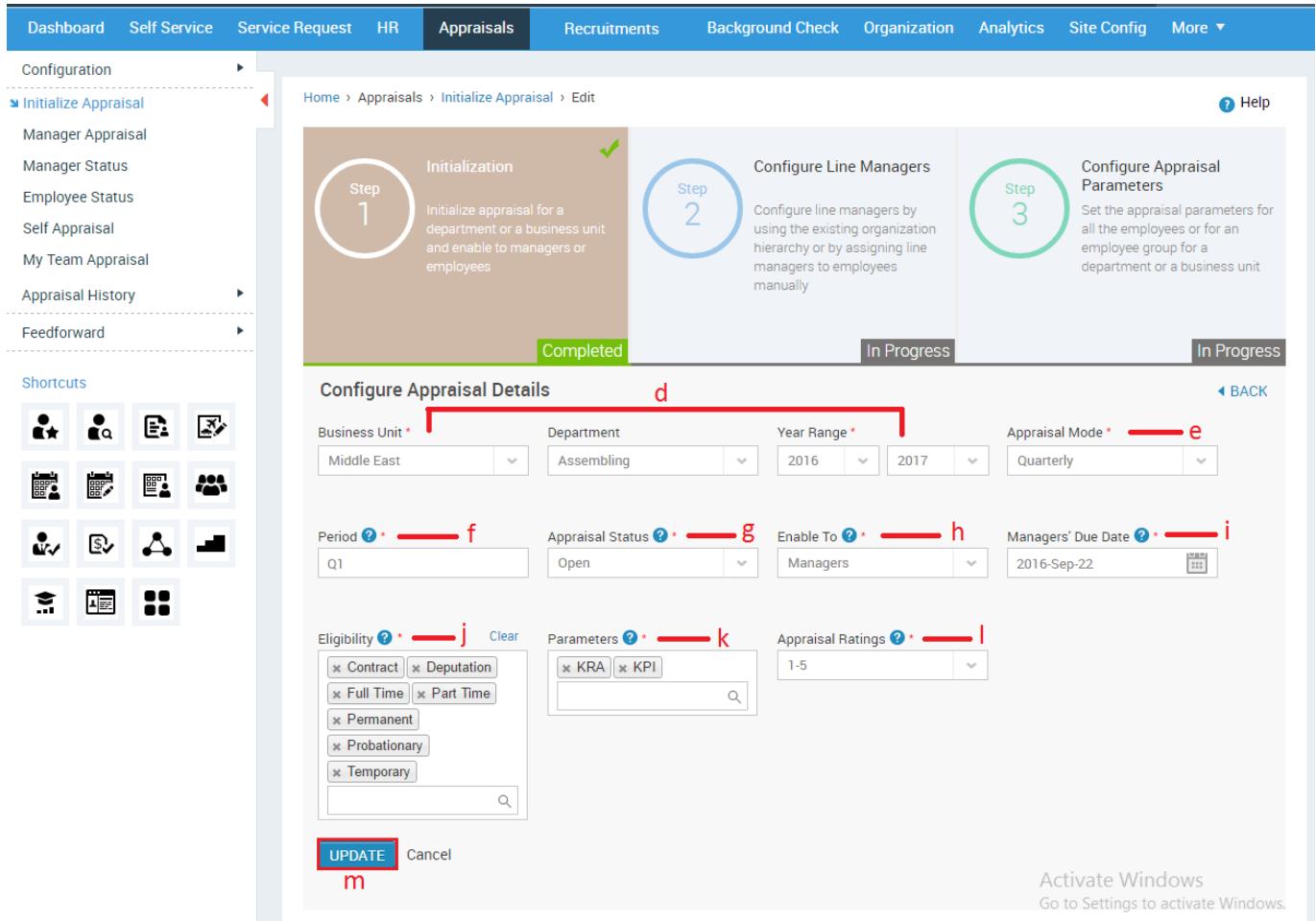
Help Pin to shortcuts

+ Add **c**

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 (highlighted in blue), Recruitments, Background Check, Organization, Analytics, Site Config, and More. The left sidebar has sections for Configuration (Initialize Appraisal, Manager Appraisal, Manager Status, Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, Feedforward), Shortcuts (with various icons), and a search bar.

The main content area displays a three-step process for initializing appraisals:

- Step 1 Initialization:** Completed (green checkmark). Description: Initialize appraisal for a department or a business unit and enable to managers or employees.
- Step 2 Configure Line Managers:** In Progress (yellow bar).
- Step 3 Configure Appraisal Parameters:** In Progress (yellow bar).

The "Configure Appraisal Details" form is open, showing the following fields:

- Business Unit:** Middle East (dropdown) - **d**
- Department:** Assembling (dropdown)
- Year Range:** 2016 - 2017 (dropdowns) - **e**
- Appraisal Mode:** Quarterly (dropdown)
- Period:** Q1 (dropdown) - **f**
- Appraisal Status:** Open (dropdown) - **g**
- Enable To:** Managers (dropdown) - **h**
- Managers' Due Date:** 2016-Sep-22 (date picker) - **i**
- Eligibility:** Contract, Deputation, Full Time, Part Time, Permanent, Probationary, Temporary (checkboxes) - **j**
- Parameters:** KRA, KPI (checkboxes) - **k**
- Appraisal Ratings:** 1-5 (dropdown) - **l**
- Buttons:** UPDATE (red button) - **m**, Cancel

A message at the bottom right says: "Activate Windows Go to Settings to activate Windows."

Figure 212

Step 1: Initialization

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

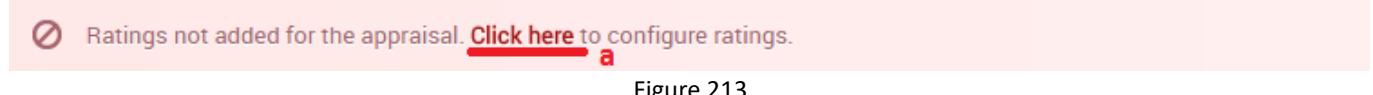


Figure 213

- 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

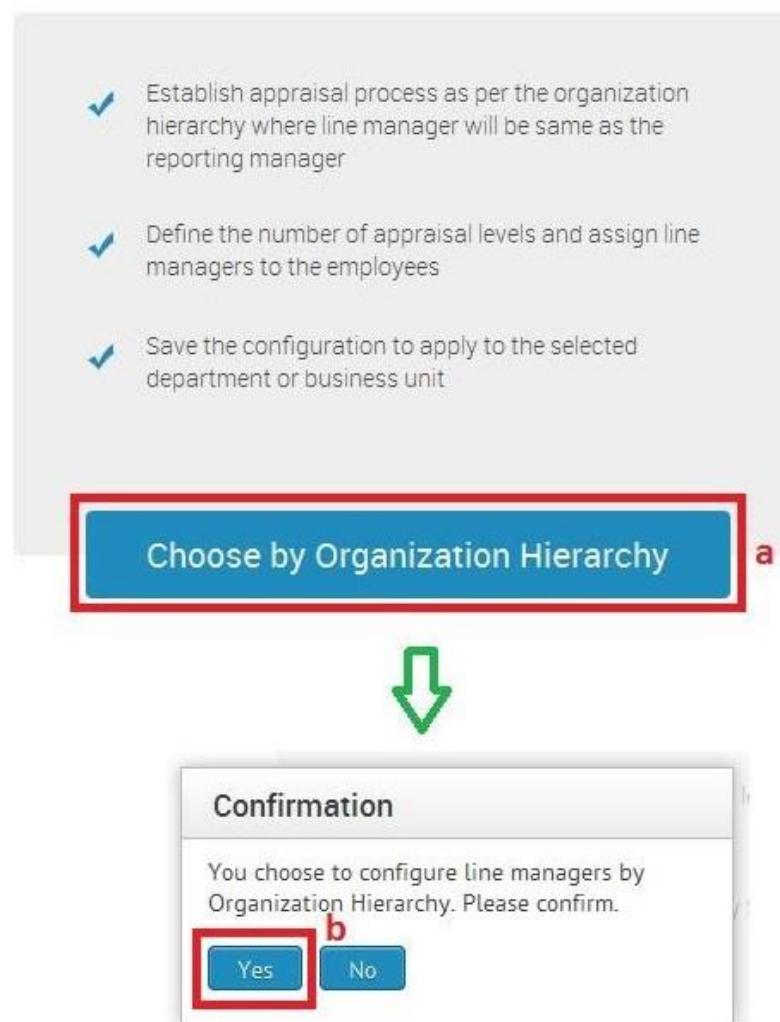


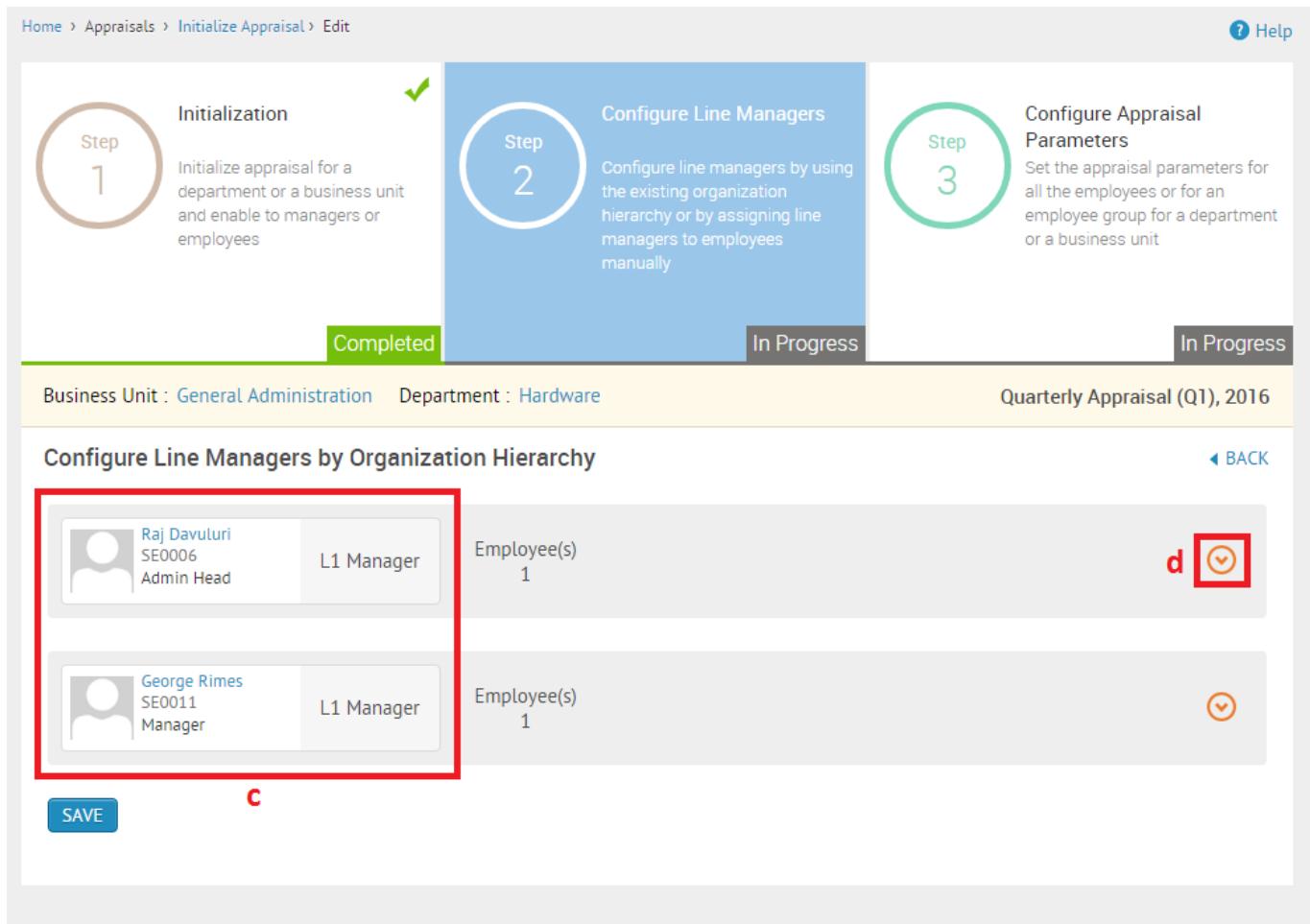
Figure 214

- Click **Choose by Organization Hierarchy** button

A small confirmation window will appear.

- Click **Yes** button

Please refer Figure 215



The screenshot shows the 'Initialize Appraisal' process in Sentrifugo. It consists of three steps:

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

Below the steps, the business unit is set to 'General Administration' and the department to 'Hardware'. The appraisal period is 'Quarterly Appraisal (Q1), 2016'. The current screen is titled 'Configure Line Managers by Organization Hierarchy'. It displays two L1 Managers:

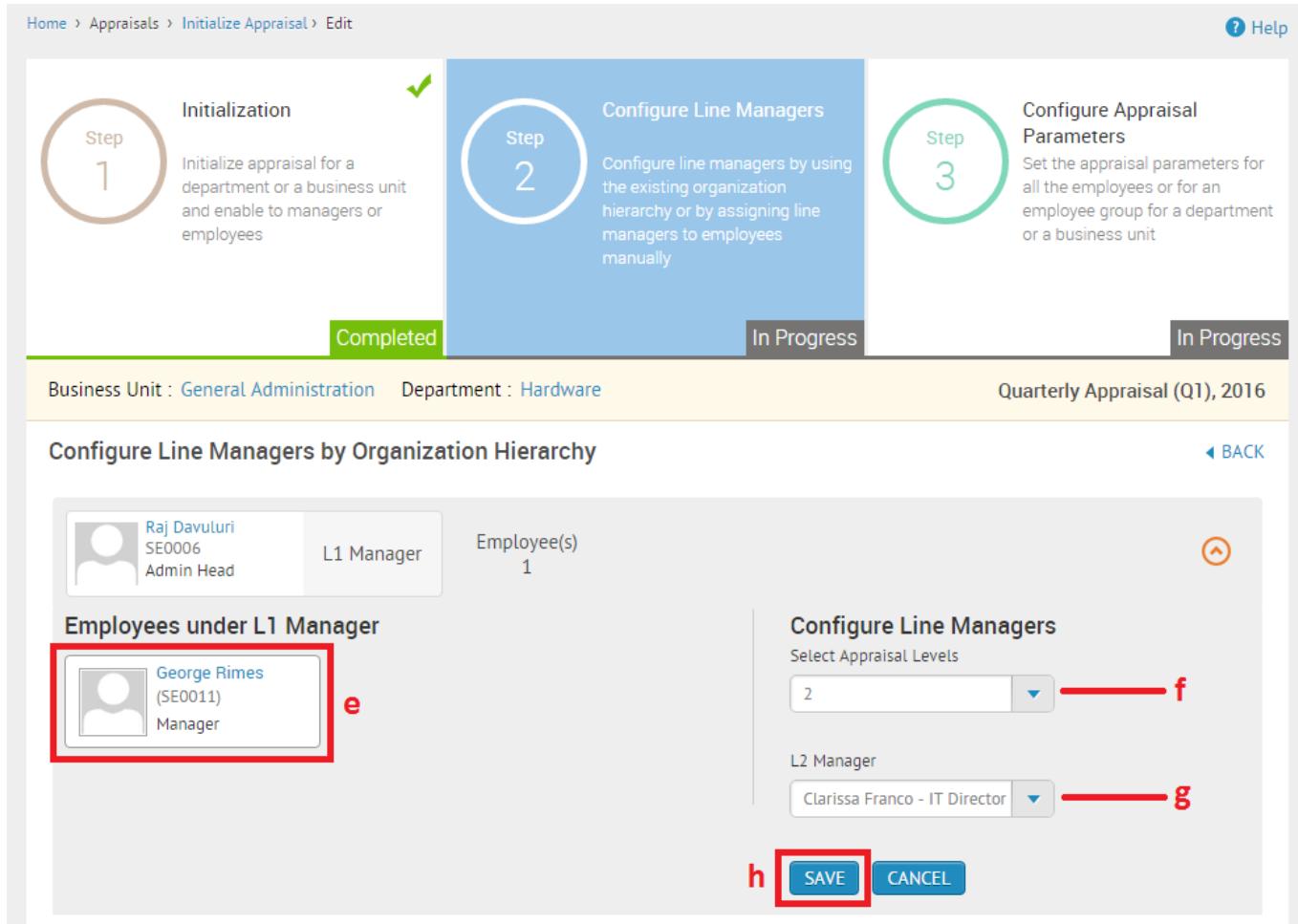
- Raj Davuluri (SE0006, Admin Head)
- George Rimes (SE0011, Manager)

 Each manager has a dropdown arrow icon to the right. A red box labeled 'C' highlights the list of managers, and a red box labeled 'd' highlights the dropdown arrow for George Rimes. A blue 'SAVE' button is at the bottom left.

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



Home > Appraisals > Initialize Appraisal > Edit ? Help

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

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

Configure Line Managers by Organization Hierarchy ◀ BACK

L1 Manager: Raj Davuluri (SE0006, Admin Head)

Employee(s): 1

Employees under L1 Manager:

- George Rimes (SE0011, Manager) e

Configure Line Managers:

Select Appraisal Levels: 2 f

L2 Manager: Clarissa Franco - IT Director g

Buttons: h **SAVE** CANCEL

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

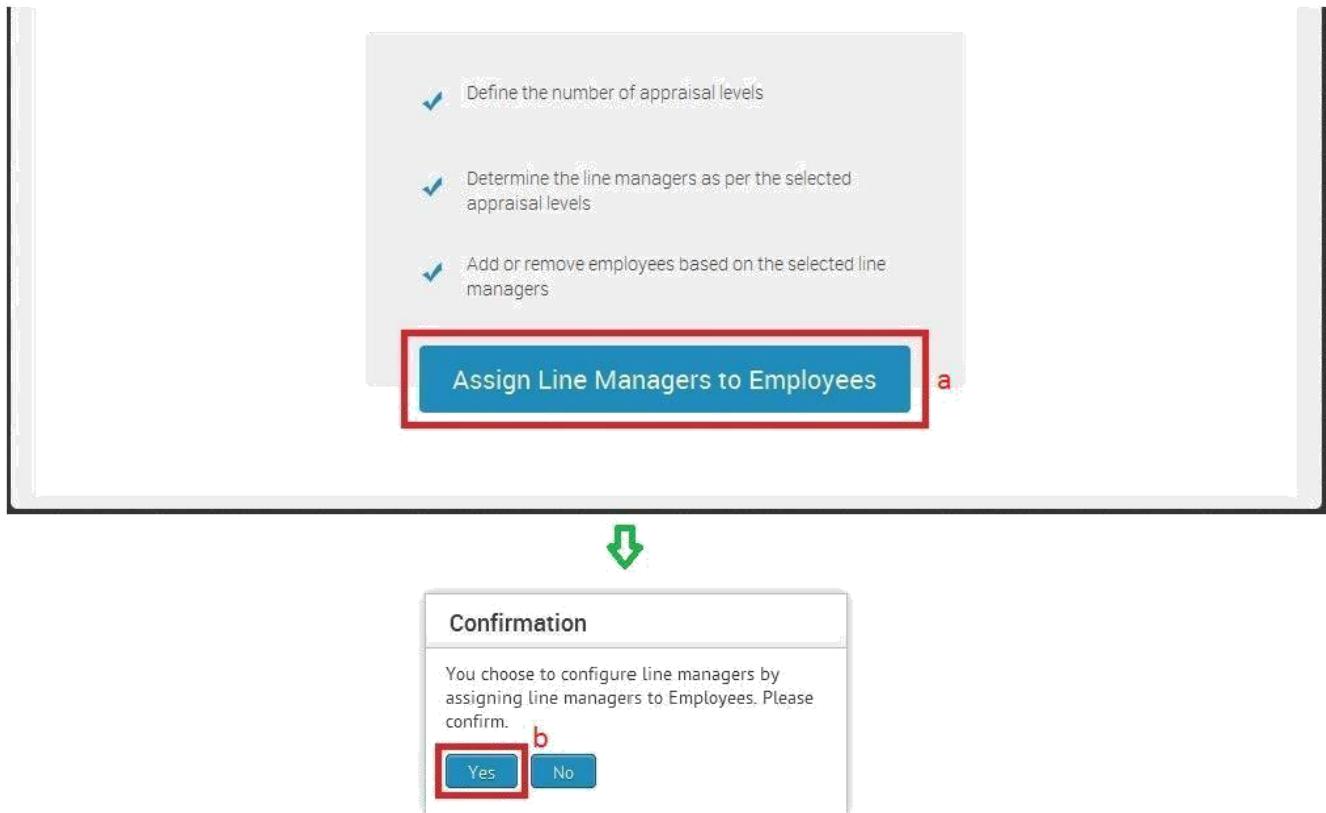


Figure 217

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

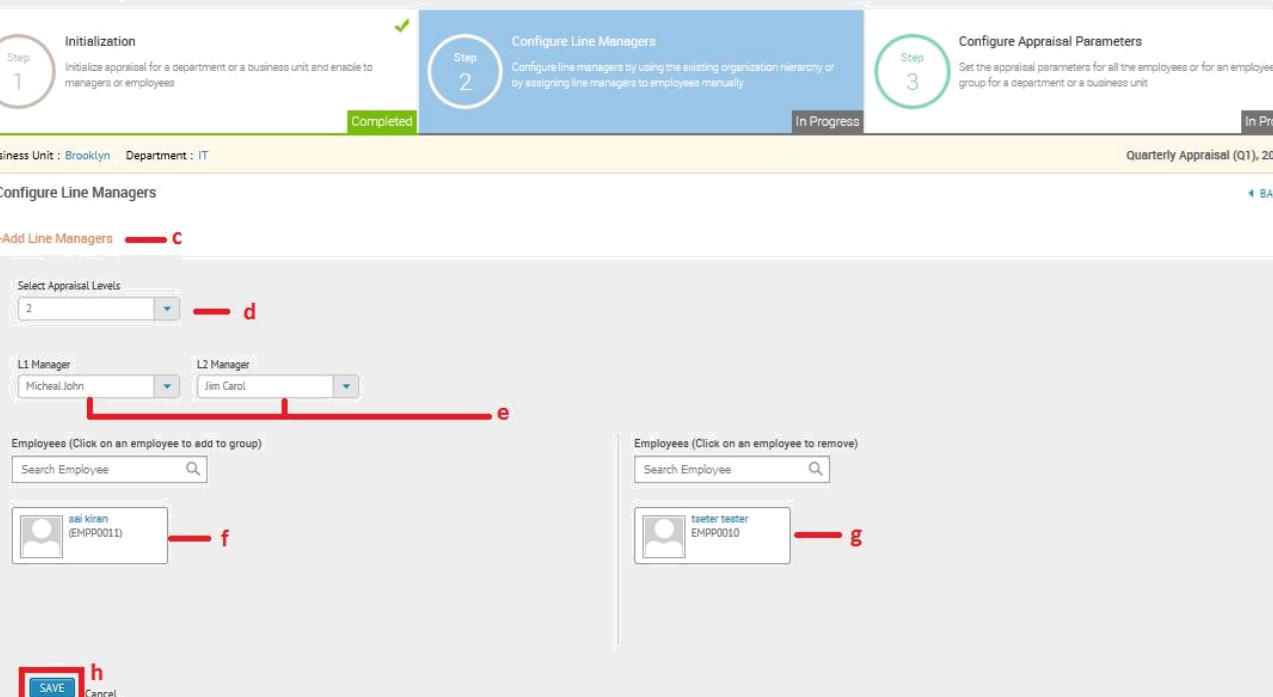


Figure 218

- 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

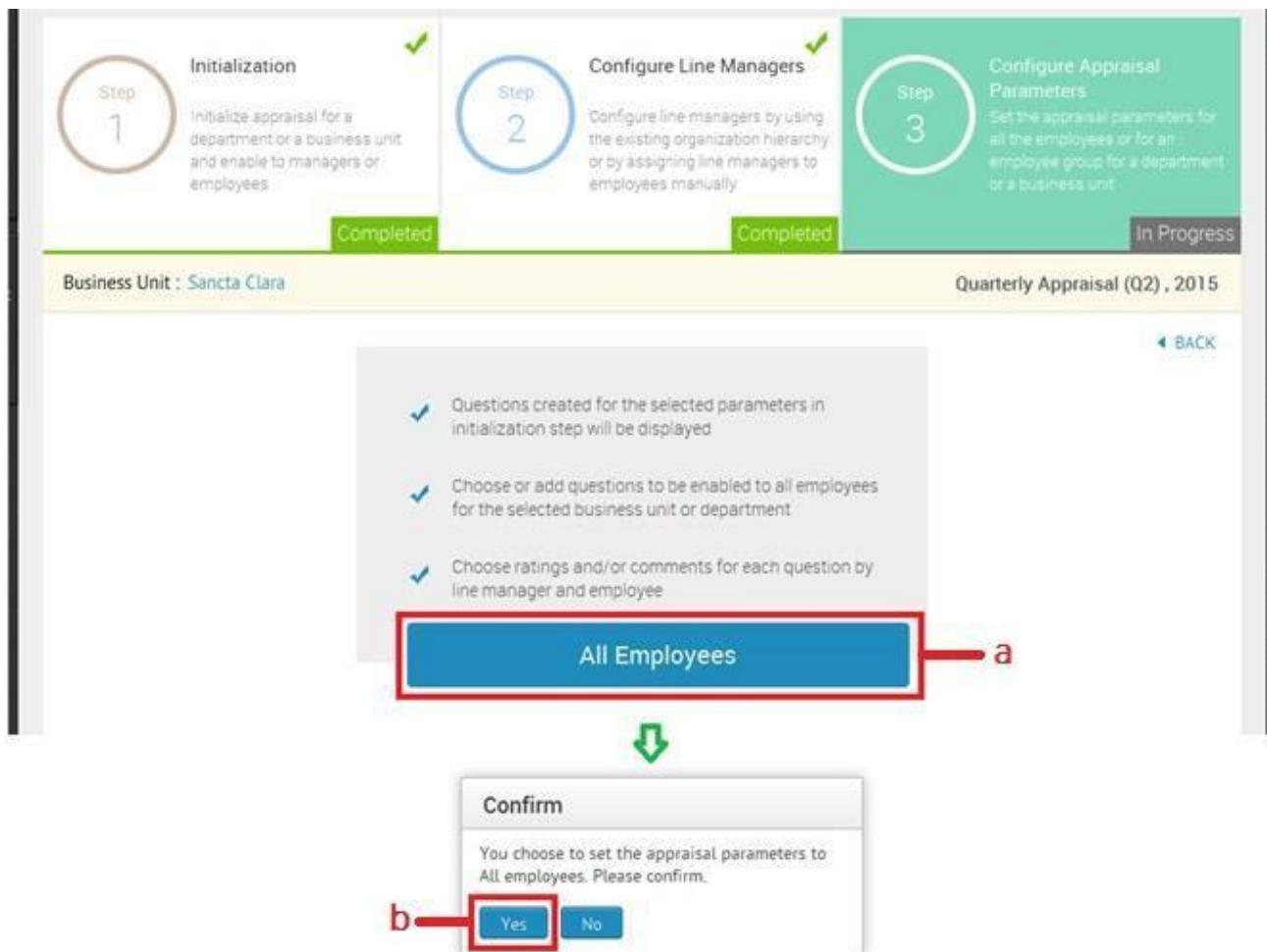


Figure 219

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

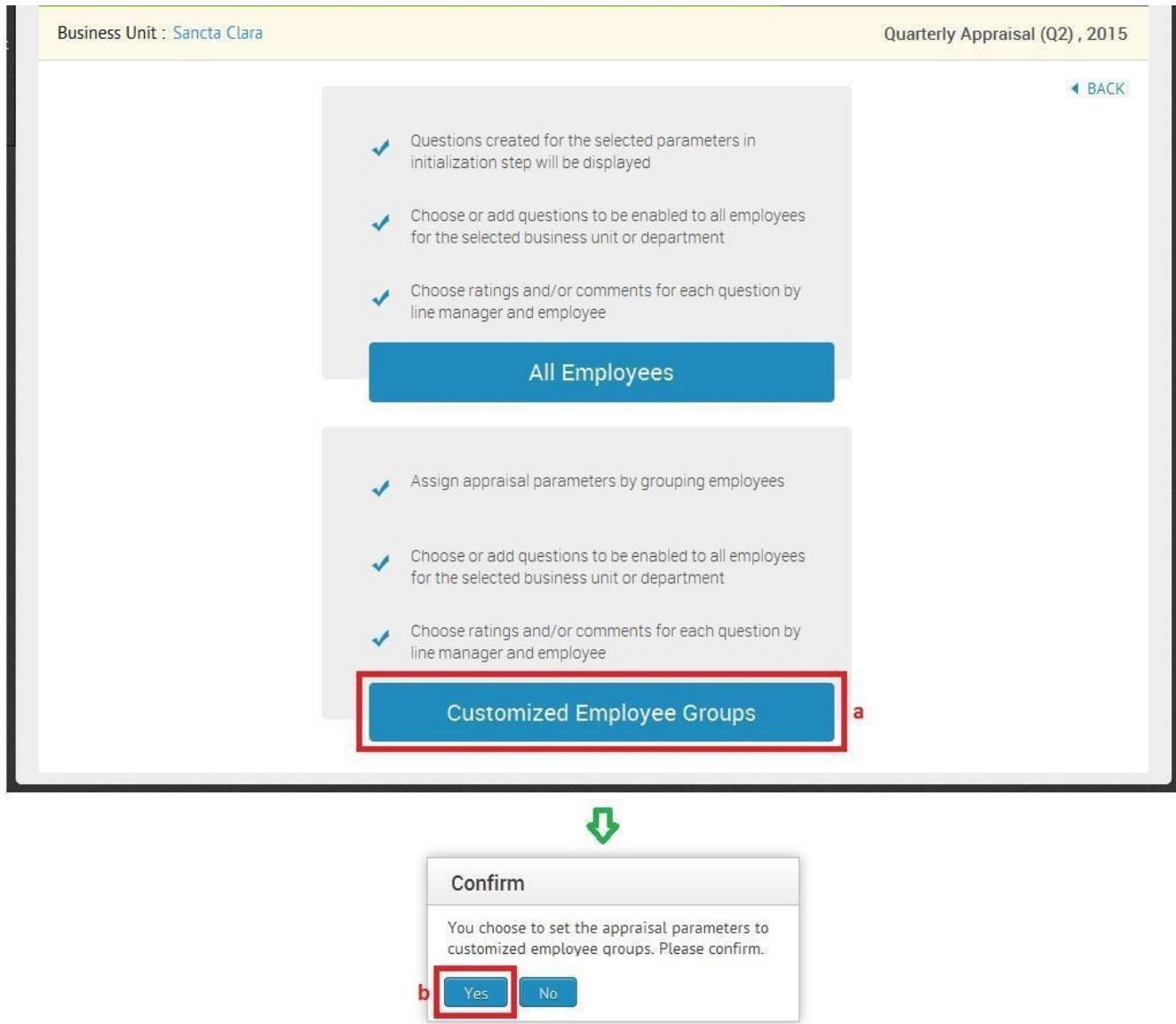


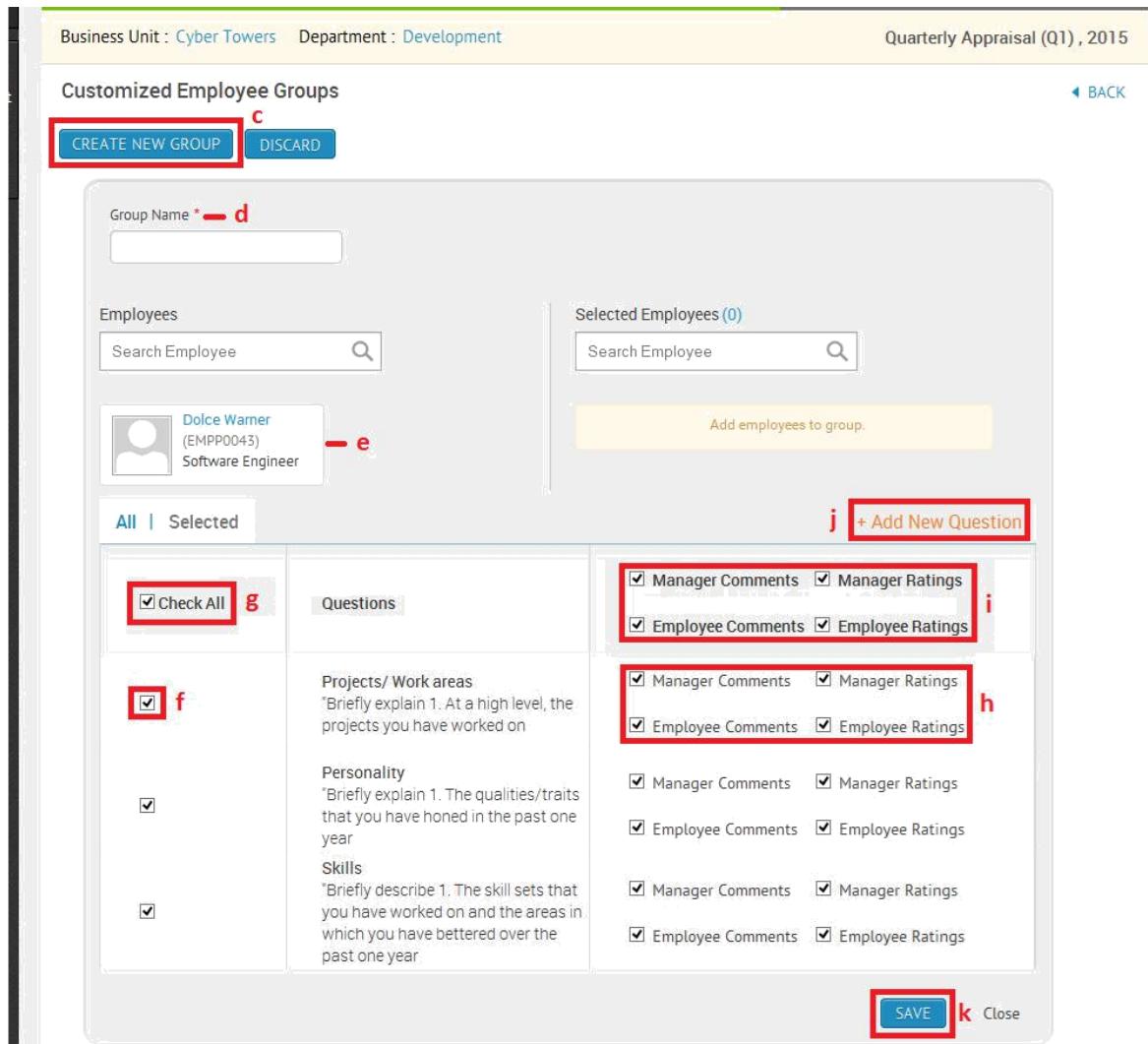
Figure 222

- a. Click **Customized Employee Groups**

A small confirmation window will open

- b. Click **Yes** button

Please refer Figure 223



Business Unit : Cyber Towers Department : Development

Quarterly Appraisal (Q1), 2015

Customized Employee Groups

c CREATE NEW GROUP **DISCARD**

Group Name * **d**

Employees

Search Employee

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

Selected Employees (0)

Search Employee

Add employees to group.

All | Selected

j + Add New Question

g Check All	Questions	i Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings
f <input checked="" type="checkbox"/>	<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 <input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings</p> <p><input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings</p> <p><input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings</p> <p><input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings</p>

k SAVE 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

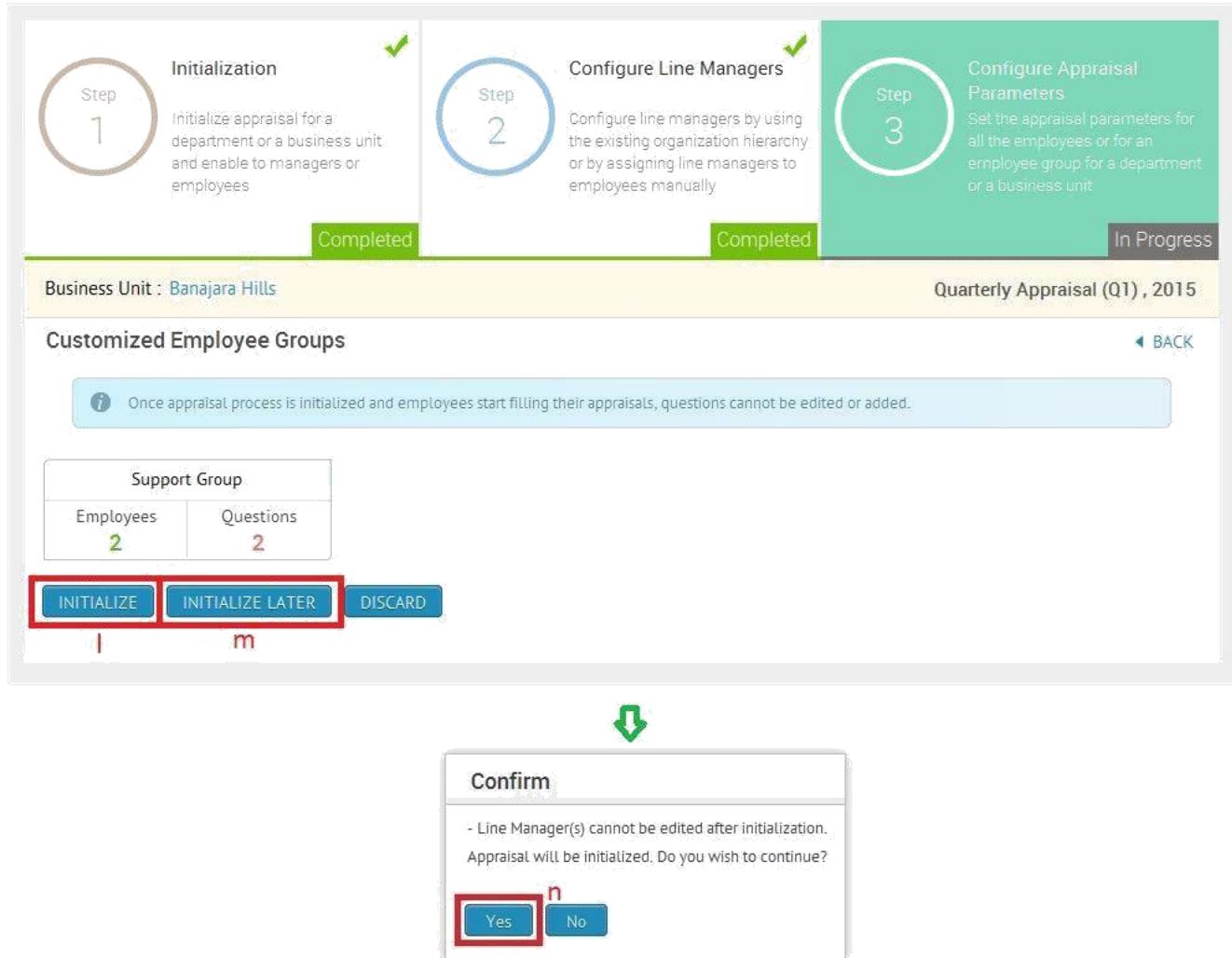


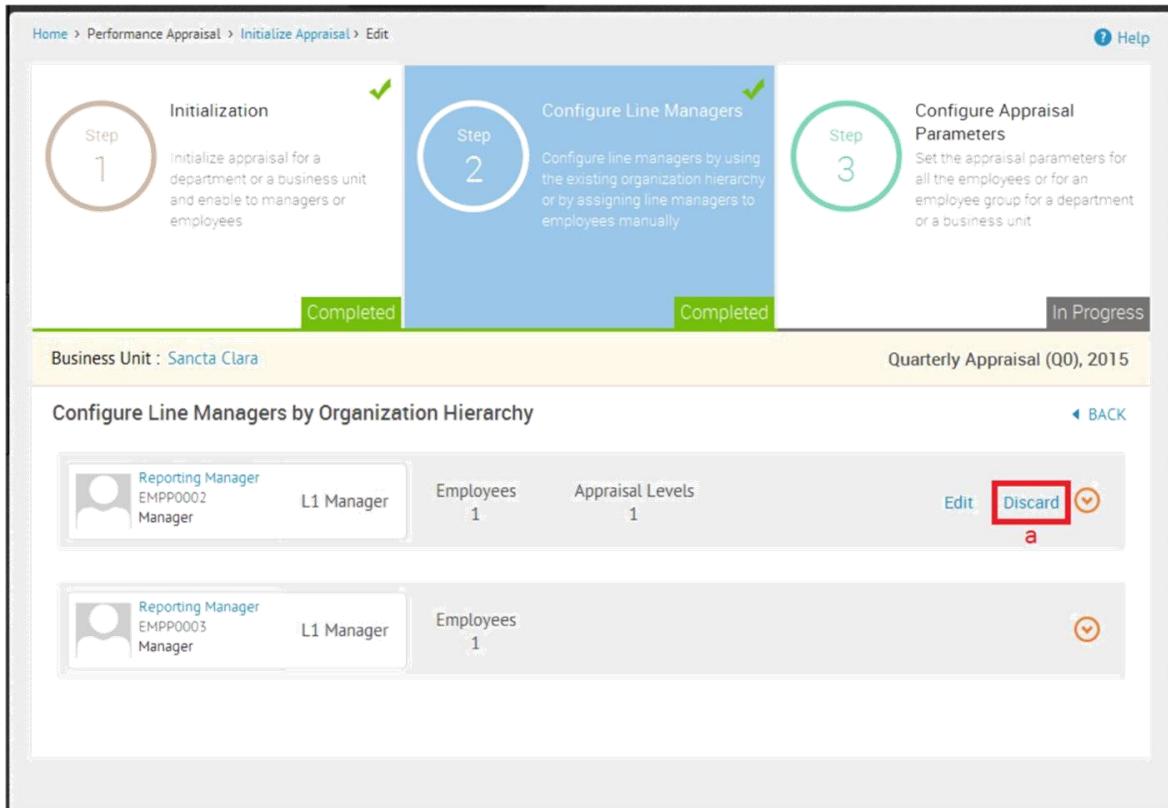
Figure 224

- 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



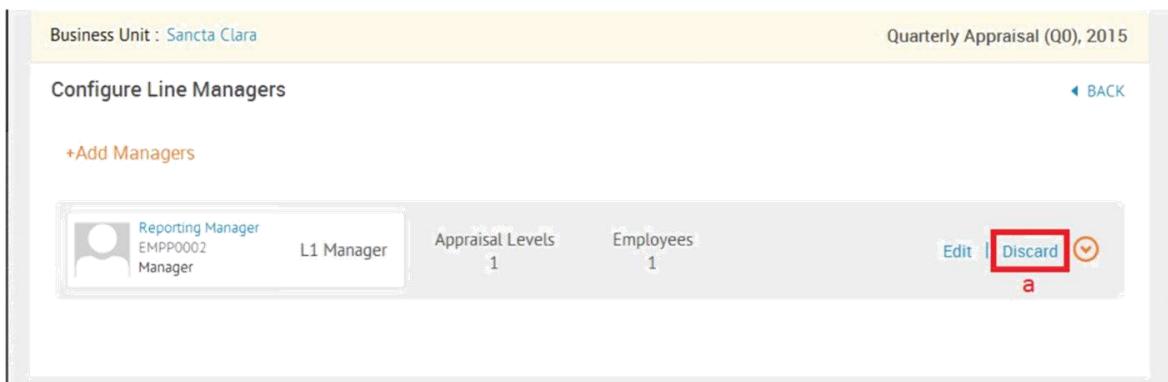
The screenshot shows the 'Initialize Appraisal' process with three steps:

- Step 1 Initialization:** Completed.
- Step 2 Configure Line Managers:** In Progress. A red box labeled 'a' highlights the 'Discard' button.
- Step 3 Configure Appraisal Parameters:** Not yet started.

Below the steps, it says 'Business Unit : Sancta Clara' and 'Quarterly Appraisal (Q0), 2015'. The 'Configure Line Managers by Organization Hierarchy' section shows two entries:

Reporting Manager	L1 Manager	Employees	Appraisal Levels	Action
EMPP0002 Manager		1	1	Edit Discard (a)
EMPP0003 Manager		1		Discard (b)

OR



The screenshot shows the 'Configure Line Managers' screen with the following details:

- Business Unit : Sancta Clara
- Quarterly Appraisal (Q0), 2015
- Configure Line Managers
- +Add Managers
- Reporting Manager EMPP0002 Manager (L1 Manager)
- Appraisal Levels 1
- Employees 1
- Action: Edit | Discard (a)

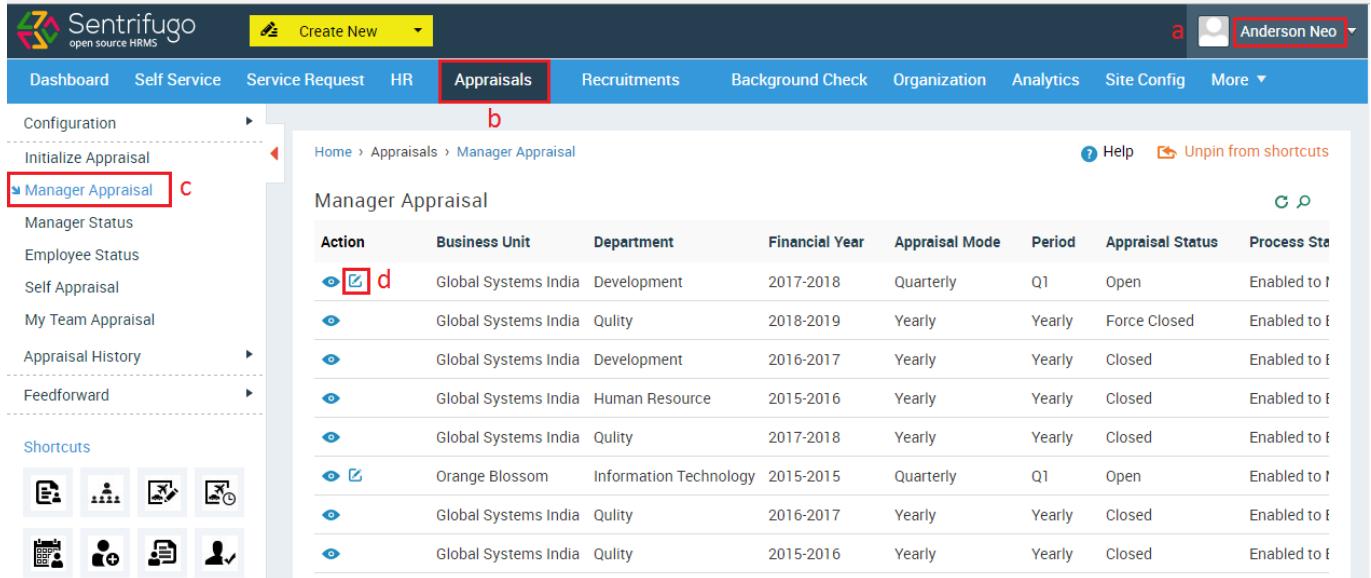
Figure 224

- 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



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

Figure 225

- a. Login as a Manager
- b. Click **Appraisals** in the top menu
- c. Click **Manager Appraisal** on the left menu panel
- d. 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

🔍

Selected Employees (0)

🔍


Employee 1
(EMPP0029)
Software Engineer

f

All | Selected
+ Add New Question
g

<input checked="" type="checkbox"/> Check All	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
<input checked="" type="checkbox"/>	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
<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

SAVE
| Close
h
i
j
k

Figure 226

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

Or

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

Or

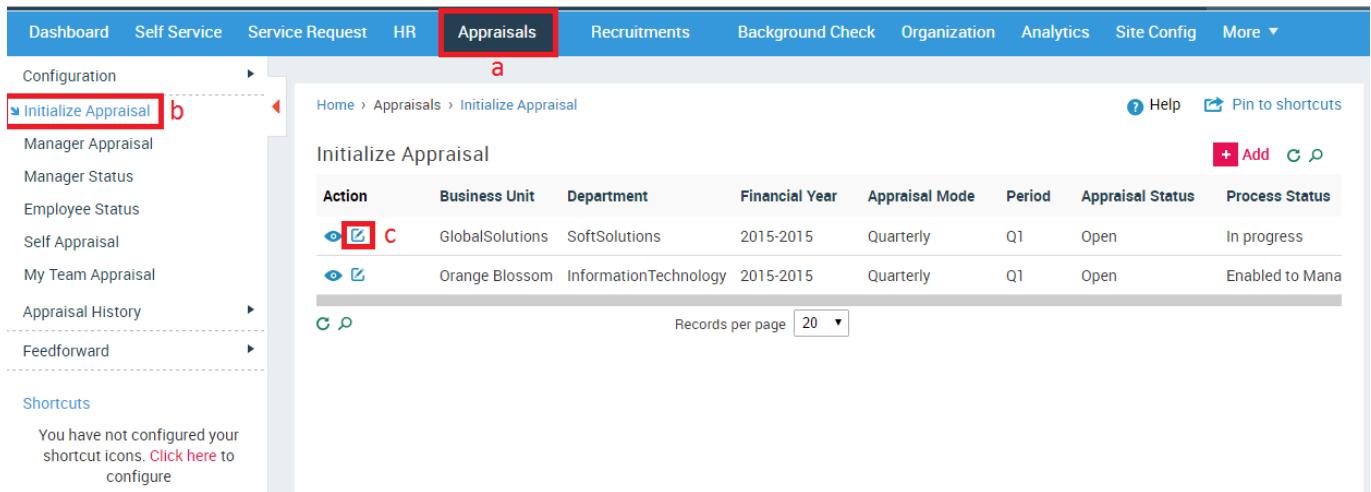
- k. Select Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
- l. Click **SAVE** button

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

16.8 How do I enable the appraisal to Employees?

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

Please refer Figure 227

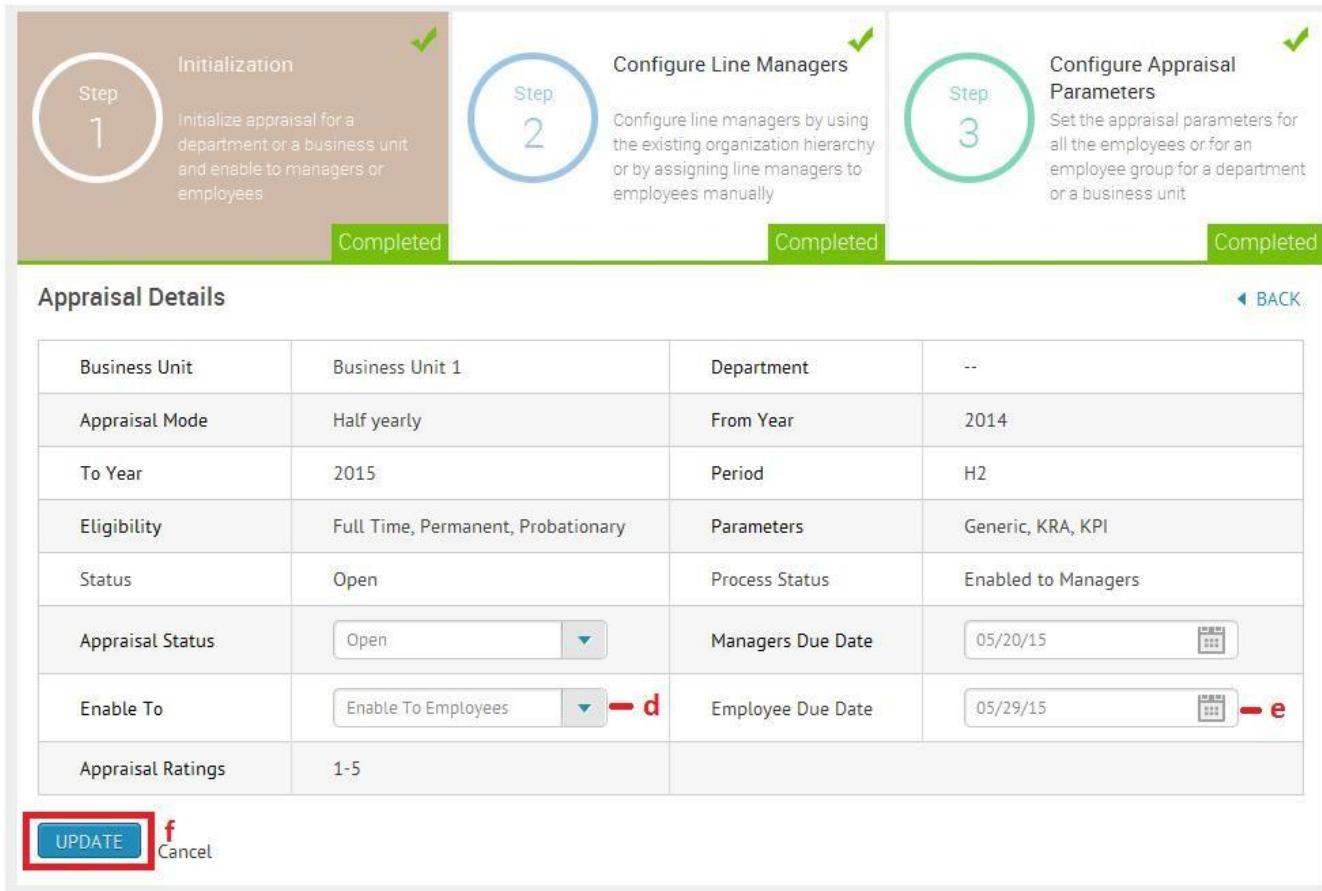


Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
<input checked="" type="checkbox"/> C	GlobalSolutions	SoftSolutions	2015-2015	Quarterly	Q1	Open	In progress
<input checked="" type="checkbox"/>	Orange Blossom	InformationTechnology	2015-2015	Quarterly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

Figure 227

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

Please refer Figure 228



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

◀ BACK

UPDATE **f** Cancel

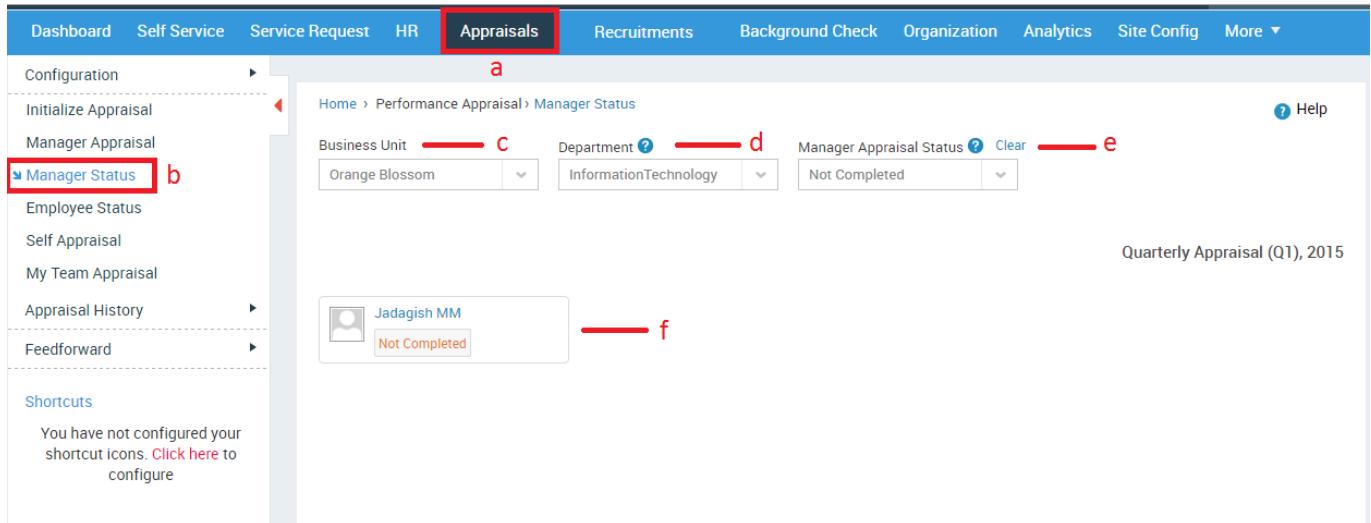
Figure 229

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

16.9 How do I view a Manager's Status?

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

Please refer Figure 230



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

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

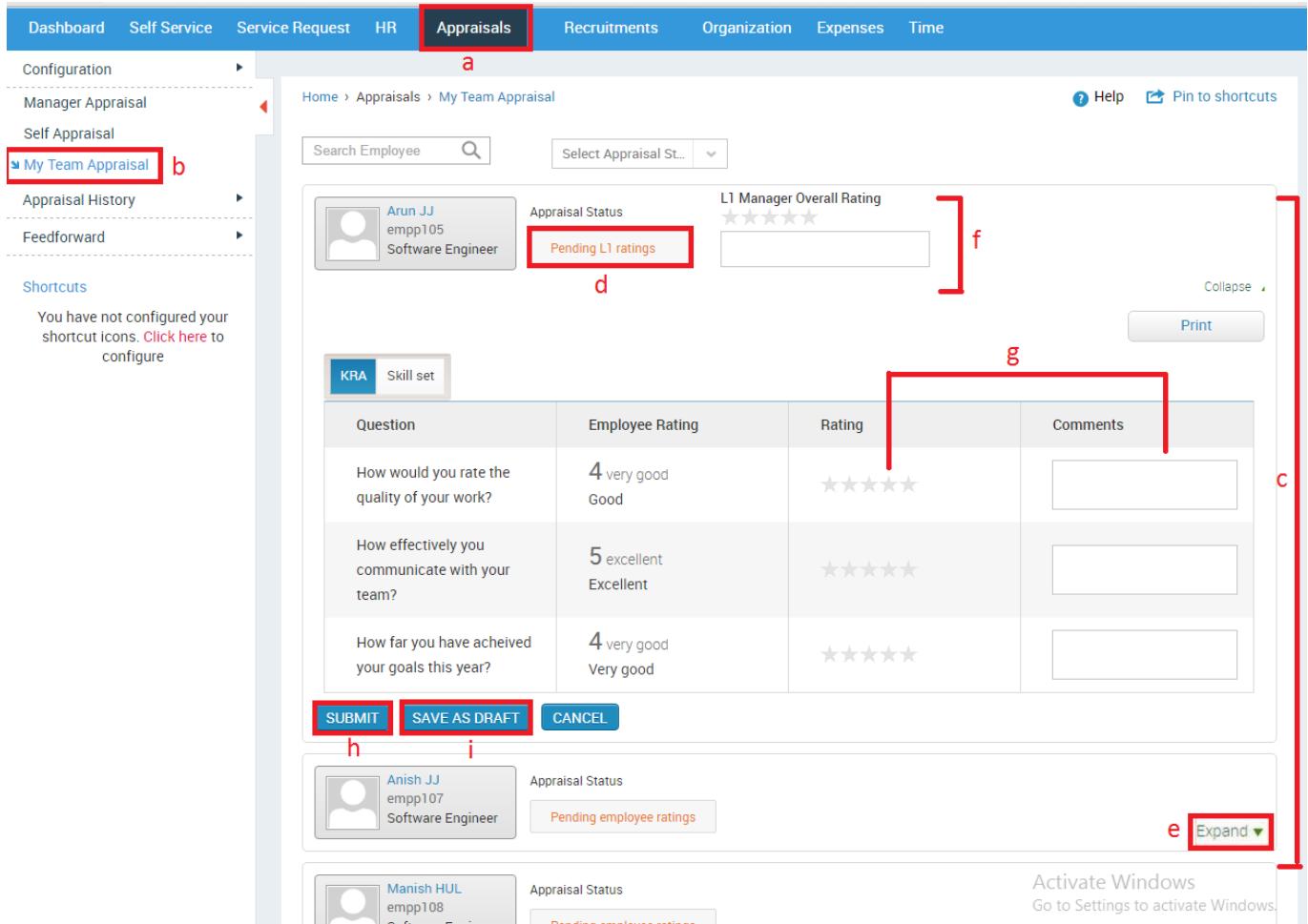
Figure 231

- 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



Home > Appraisals > My Team Appraisal

Search Employee Select Appraisal St...

L1 Manager Overall Rating Pending L1 ratings

Question	Employee Rating	Rating	Comments
How would you rate the quality of your work?	4 very good Good	★★★★★	<input type="text"/>
How effectively you communicate with your team?	5 excellent Excellent	★★★★★	<input type="text"/>
How far you have achieved your goals this year?	4 very good Very good	★★★★★	<input type="text"/>

SUBMIT **SAVE AS DRAFT** **CANCEL**

Anish JJ emp107 Software Engineer Pending employee ratings

Manish HUL emp108 Software Engineer Pending employee ratings

Activate Windows
Go to Settings to activate Windows.

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

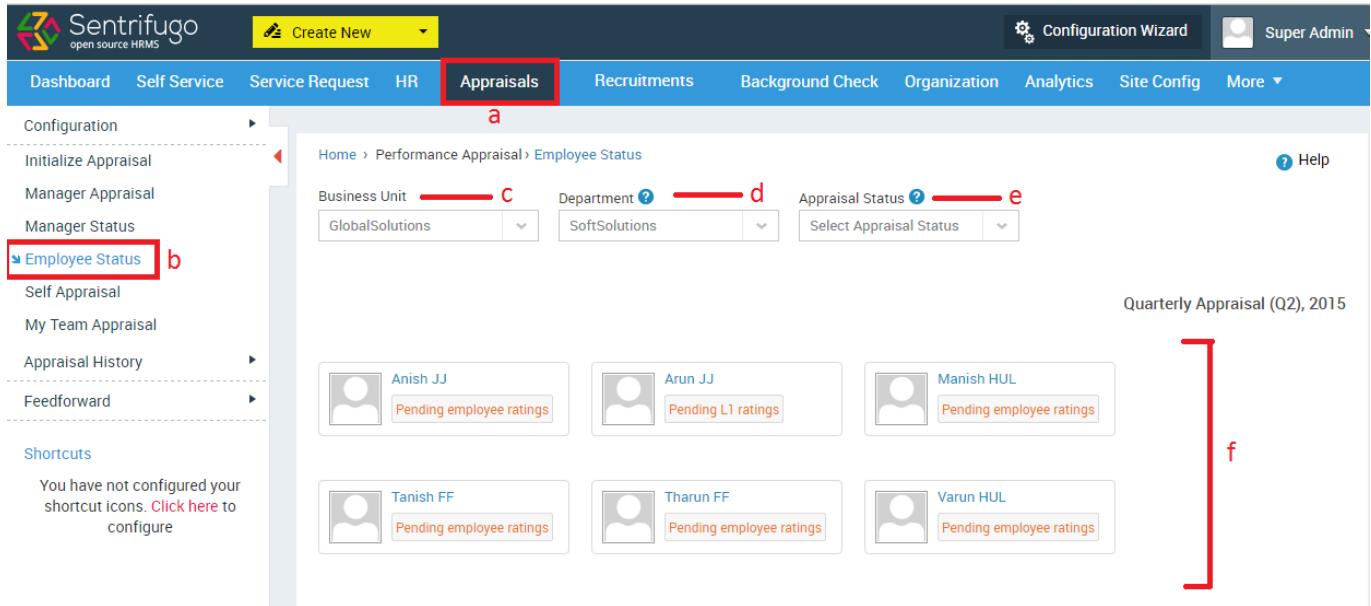


Figure 233

- 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

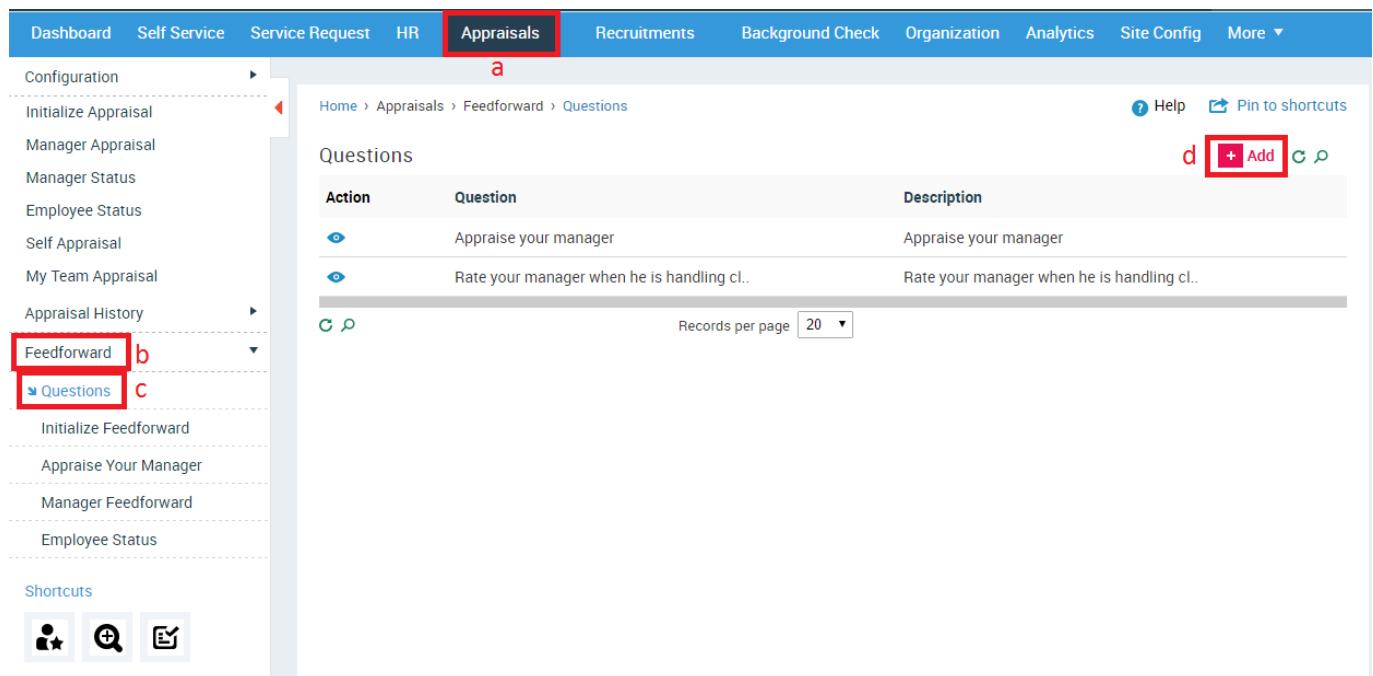
16.13 What is Feedforward?

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

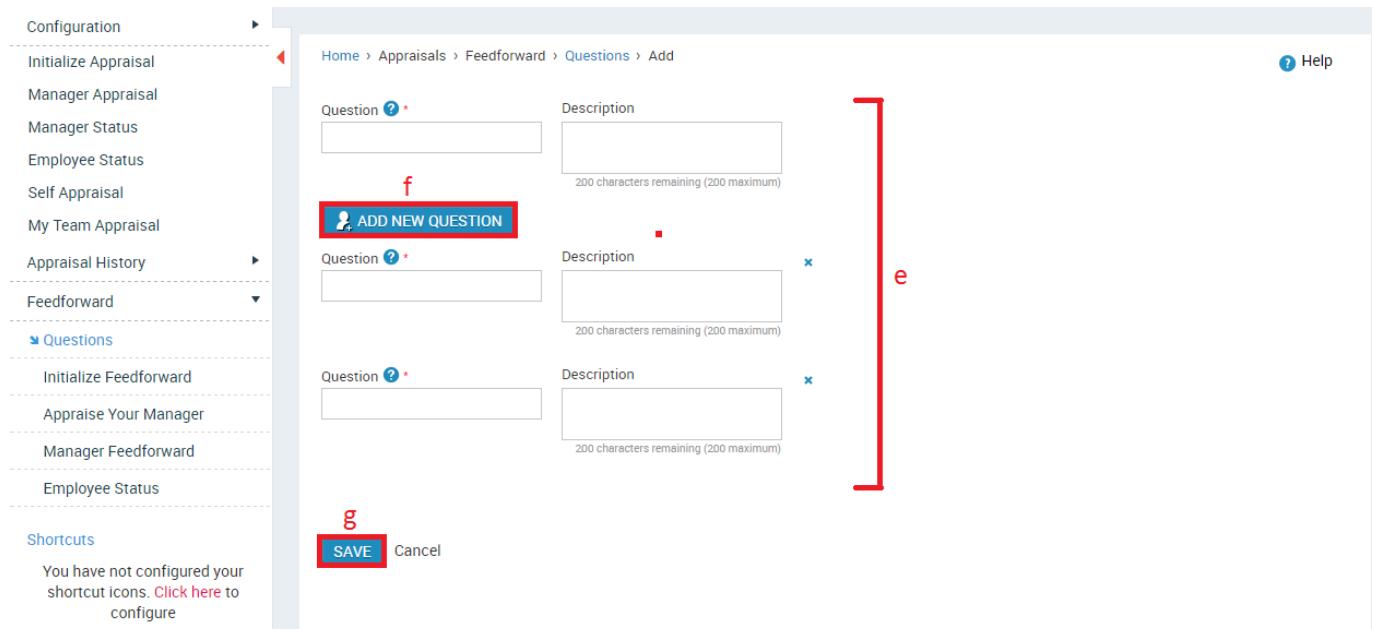


The screenshot shows the Sentrifugo application interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (which is highlighted with a red box 'a'), Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar menu lists Configuration, Initialize Appraisal, Manager Appraisal, Manager Status, Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, Feedforward (which is highlighted with a red box 'b'), and Questions (which is highlighted with a red box 'c'). Under Feedforward, there are sub-options like Initialize Feedforward, Appraise Your Manager, Manager Feedforward, and Employee Status. At the bottom of the sidebar are three icons: a user profile, a magnifying glass, and a document. The main content area displays a table titled 'Questions' with columns for Action, Question, and Description. Two rows are shown: 'Appraise your manager' and 'Rate your manager when he is handling cl...'. Below the table are 'Globe' and 'Search' icons, and a dropdown for 'Records per page' set to 20. In the top right corner, there are 'Help' and 'Pin to shortcuts' links, along with a red box 'd' highlighting the '+Add' button.

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. The left sidebar is identical to Figure 234. The main form has a header 'Home > Appraisals > Feedforward > Questions > Add'. It contains three question rows. Each row has a 'Question' input field (highlighted with a red box 'f') and a 'Description' input field (highlighted with a red box 'e'). The 'Description' fields have a note '200 characters remaining (200 maximum)'. Below the rows is a red 'ADD NEW QUESTION' button. At the bottom left are 'SAVE' and 'Cancel' buttons, with a red box 'g' highlighting the 'SAVE' button.

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

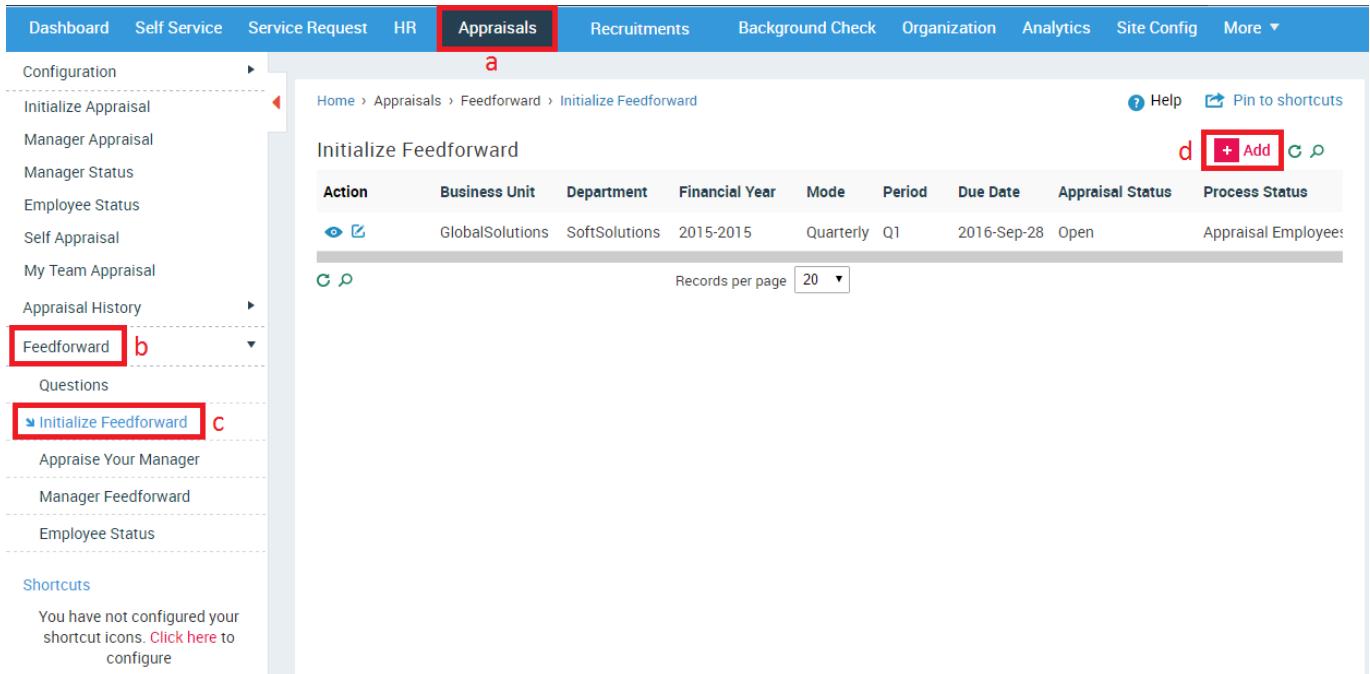
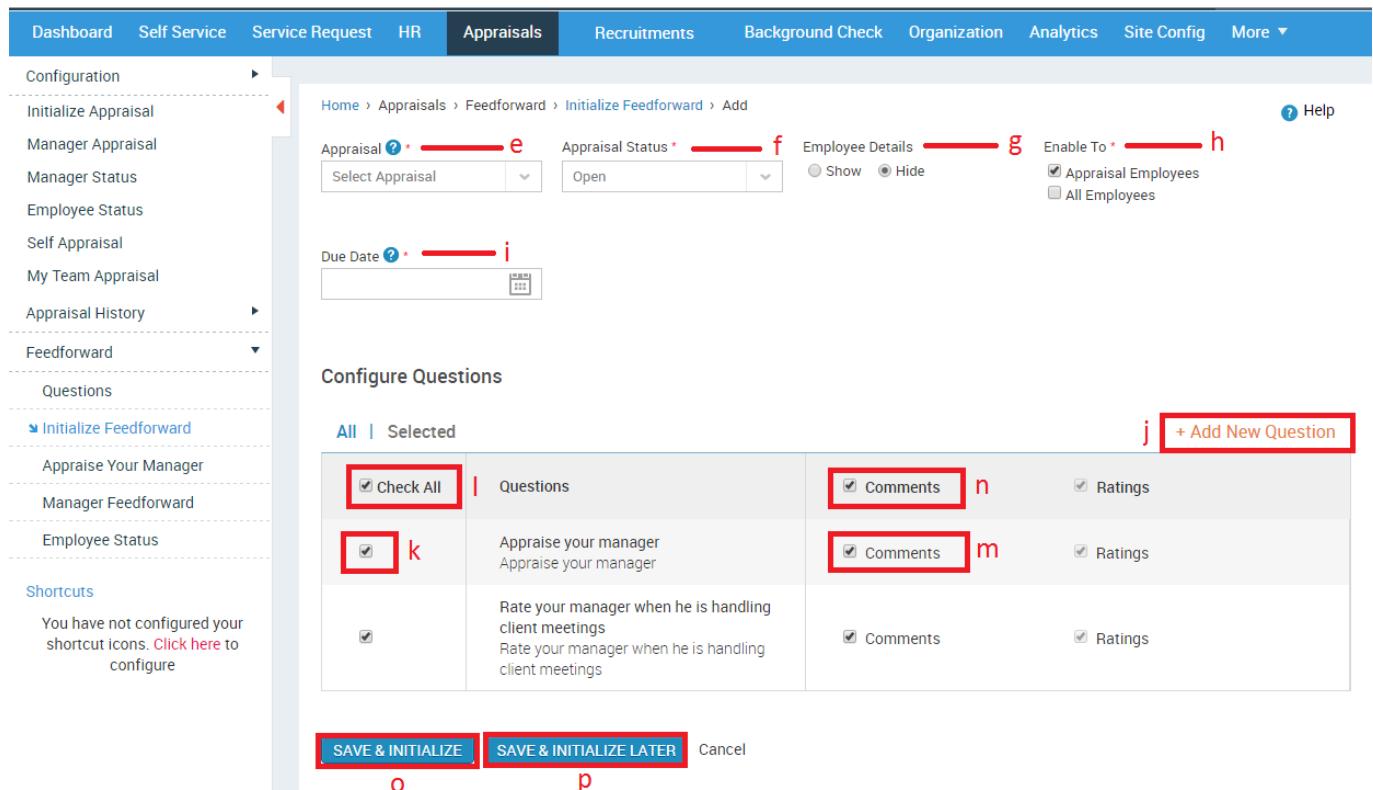


Figure 237

- 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 Sentrifugo Appraisals module. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (selected), Recruitments, Background Check, Organization, Analytics, Site Config, and More. The left sidebar has sections for Configuration, Initialize Appraisal, Manager Appraisal, Manager Status, Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, Feedforward (selected), and Questions. Under Feedforward, there are sub-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' configuration with fields for Appraisal (dropdown e), Appraisal Status (dropdown f, set to Open), Employee Details (radio buttons g, Show selected), Enable To (checkboxes h, checked for Appraisal Employees), Due Date (input field i), and a 'Configure Questions' section. The 'Configure Questions' section lists three questions: 'Check All' (checkbox k), 'Appraise your manager' (checkbox m), and 'Rate your manager when he is handling client meetings' (checkbox n). For each question, there are checkboxes for Comments and Ratings. At the bottom are buttons for SAVE & INITIALIZE (button o), SAVE & INITIALIZE LATER (button 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

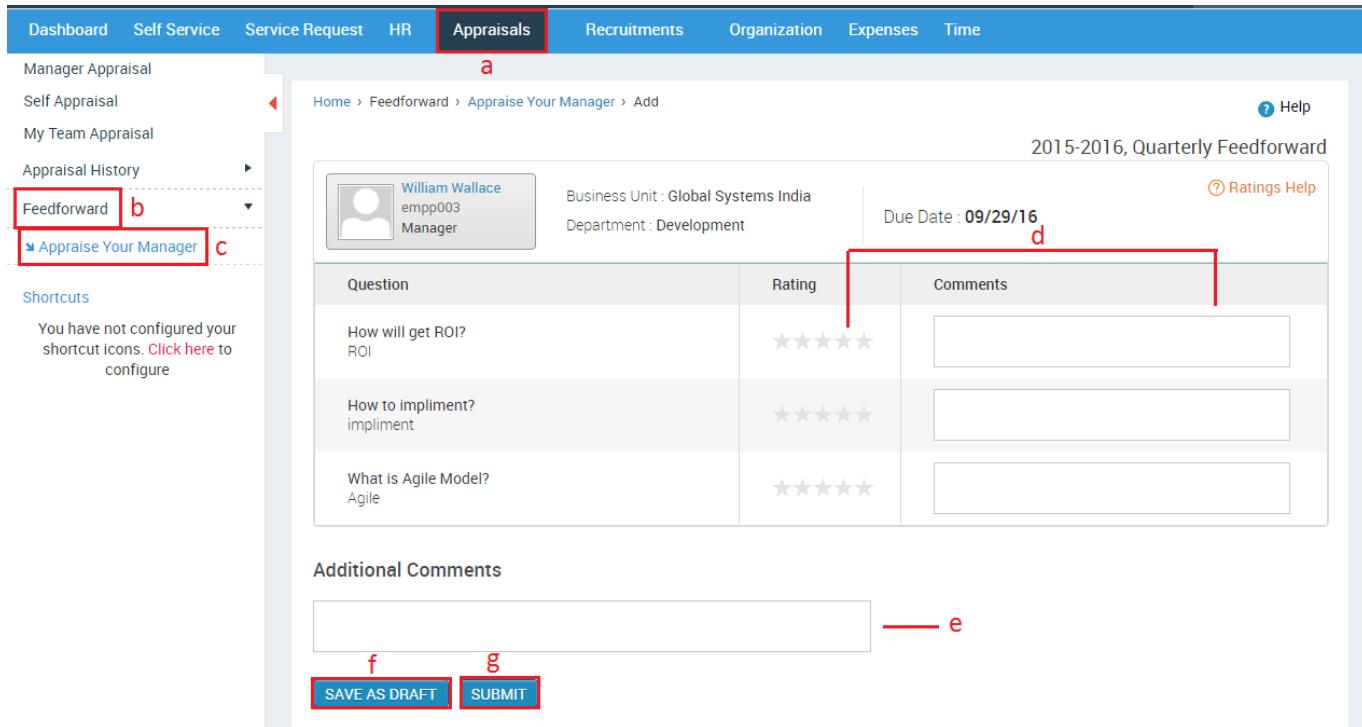
Or

- 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



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

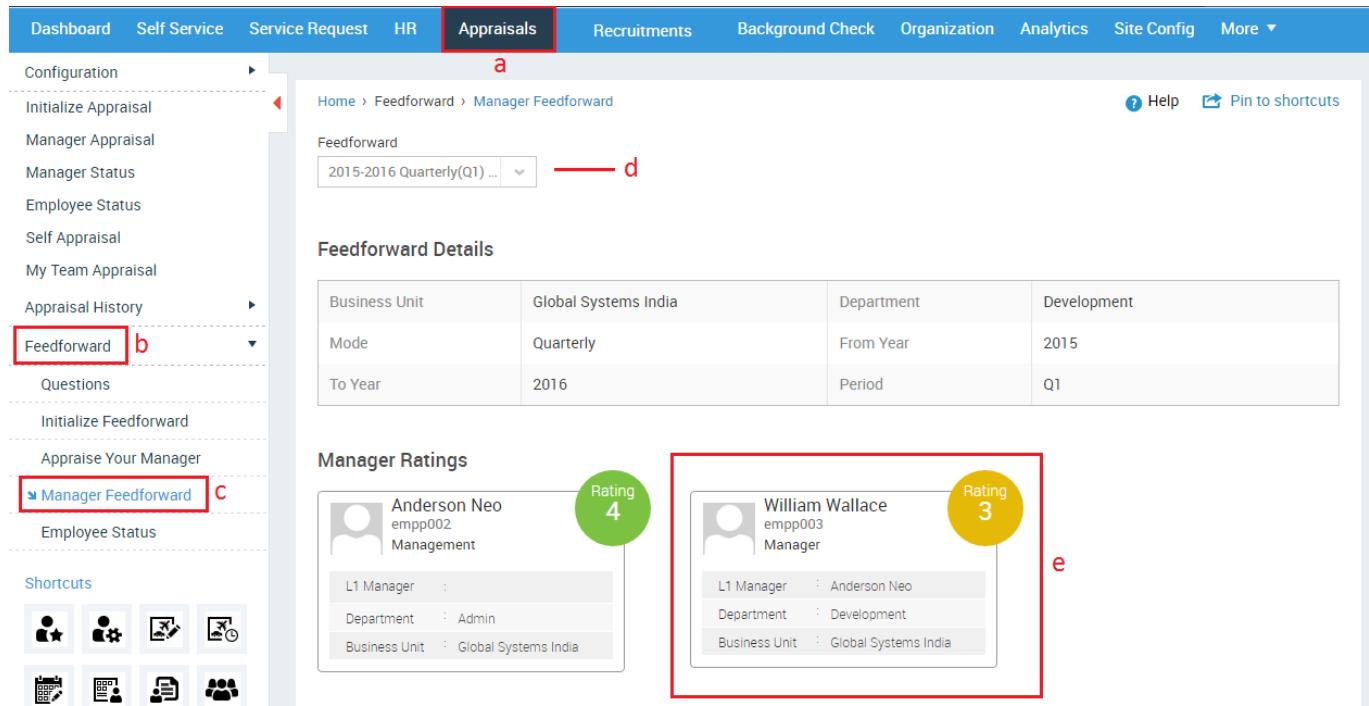
Figure 240

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

16.17 How do I view Managers' Feedforward details?

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

Please refer Figure 241



The screenshot shows the Sentrifugo HRMS application interface. 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 left-hand sidebar contains sections for Configuration, Initialize Appraisal, Manager Appraisal, Manager Status, Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, Feedforward (highlighted with a red box), Questions, Initialize Feedforward, Appraise Your Manager, Manager Feedforward (highlighted with a red box and labeled 'c'), and Employee Status. Shortcuts are also listed. The main content area displays 'Feedforward Details' for the '2015-2016 Quarterly(Q1)' process (highlighted with a red box and labeled 'd'). It shows a table with four rows: Business Unit (Global Systems India), Department (Development), Mode (Quarterly), From Year (2015), To Year (2016), Period (Q1). Below this, the 'Manager Ratings' section is shown for two managers. Manager 1, Anderson Neo (emp002, Management), has a rating of 4 (highlighted with a green circle and labeled 'Rating 4'). Manager 2, William Wallace (emp003, Manager), has a rating of 3 (highlighted with a yellow circle and labeled 'Rating 3'). Both managers have L1 Manager (Anderson Neo), Department (Development), and Business Unit (Global Systems India) listed under their details. A red box labeled 'e' highlights the Manager Ratings section.

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

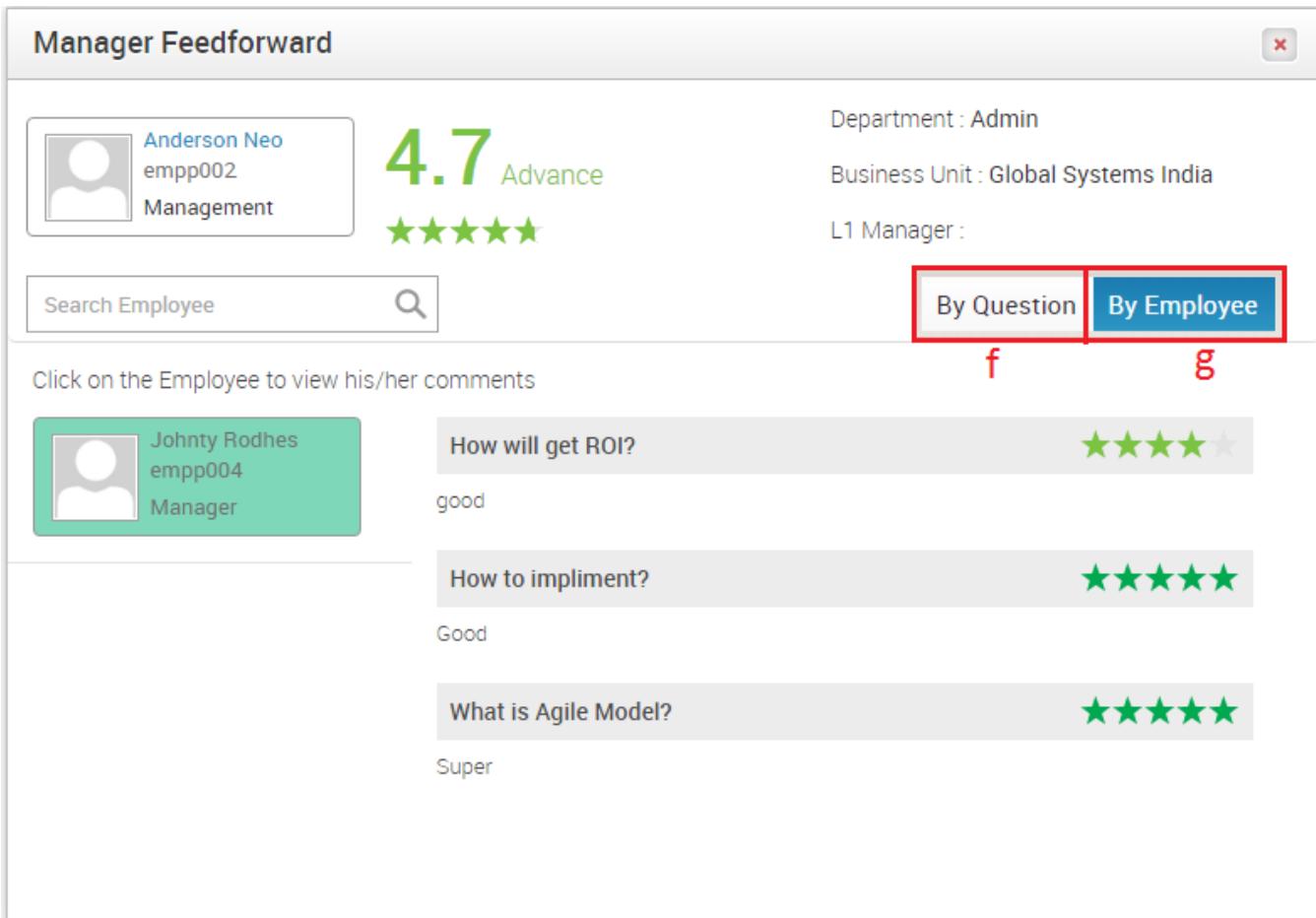


Figure 243

*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

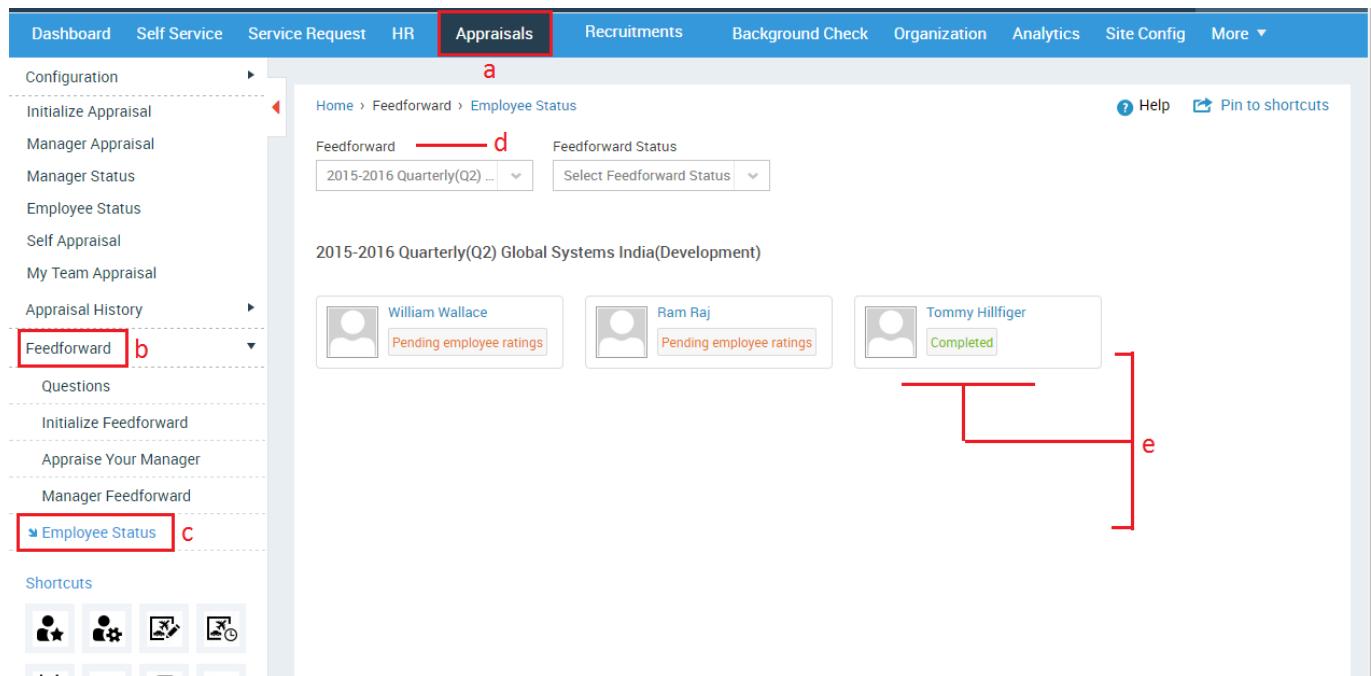


Figure 244

- 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

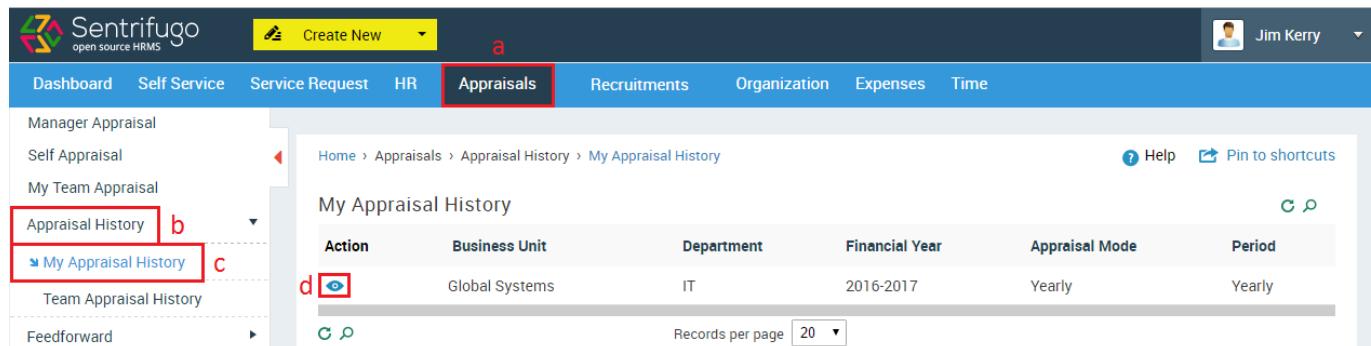
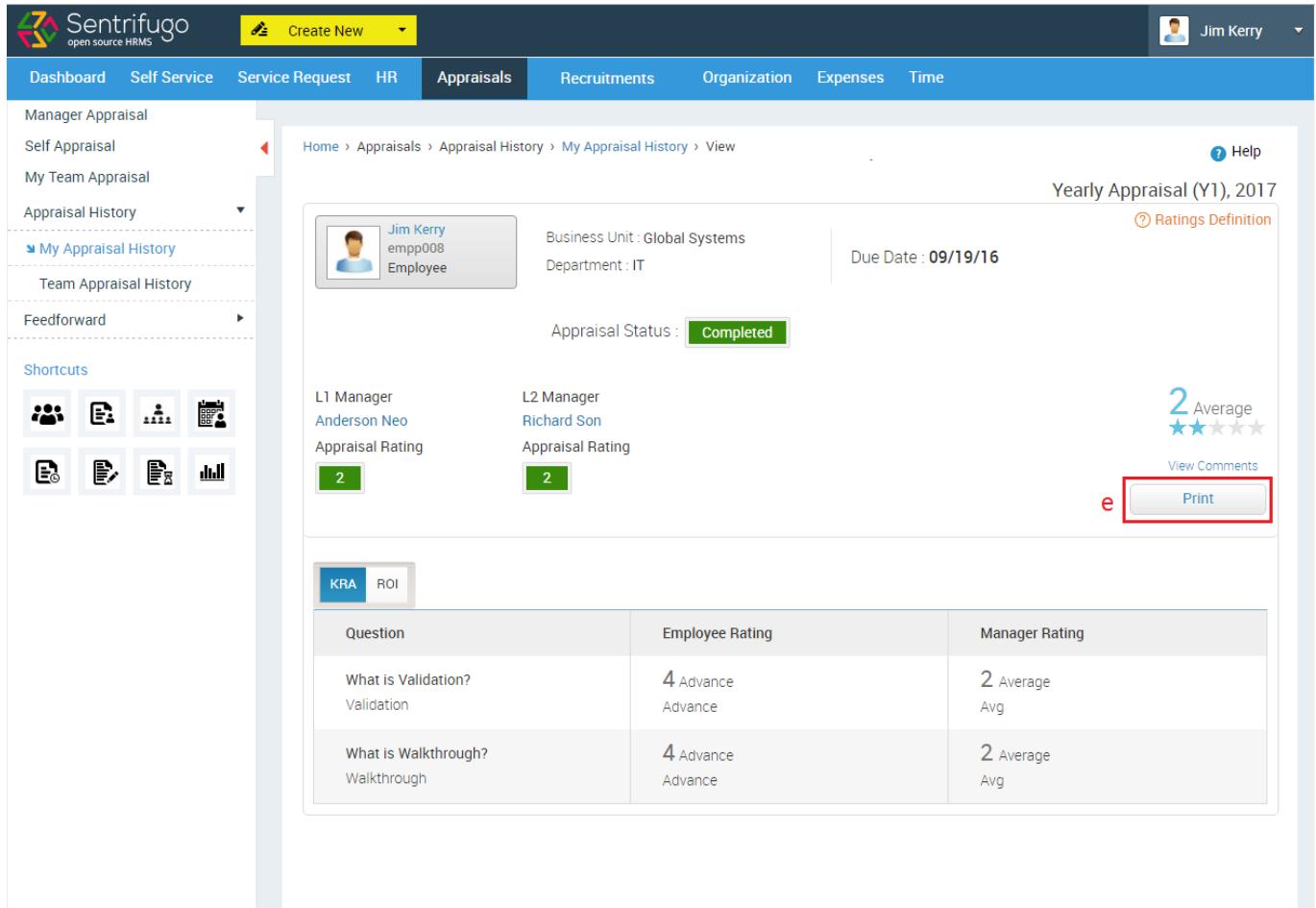


Figure 245

- 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 the logo, a 'Create New' dropdown, and a user profile for Jim Kerry. The main menu has tabs for Dashboard, Self Service, Service Request, HR, Appraisals (which is selected), Recruitments, Organization, Expenses, and Time. On the left, a sidebar lists Manager Appraisal, Self Appraisal, My Team Appraisal, Appraisal History (selected), Team Appraisal History, Feedforward, and Shortcuts (with icons for users, documents, reports, and charts). The central content area displays Jim Kerry's appraisal details: Business Unit: Global Systems, Department: IT, Due Date: 09/19/16, and Appraisal Status: Completed. It also shows L1 Manager (Anderson Neo) and L2 Manager (Richard Son) with their respective Appraisal Ratings (both 2). A summary table compares KRA and ROI for two questions: 'What is Validation?' and 'What is Walkthrough?'. The 'Print' button at the bottom right of the main content area is highlighted with a red box.

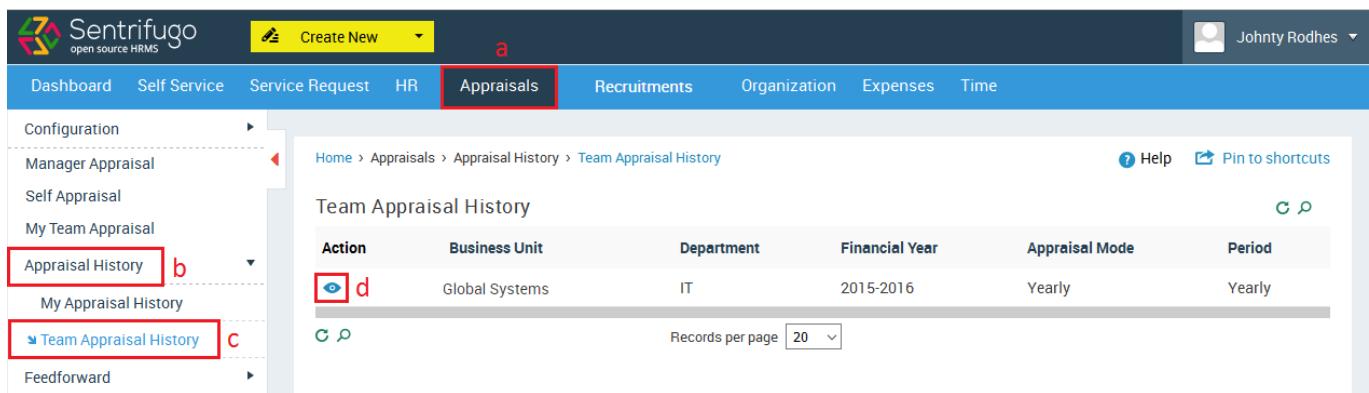
Figure 246

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

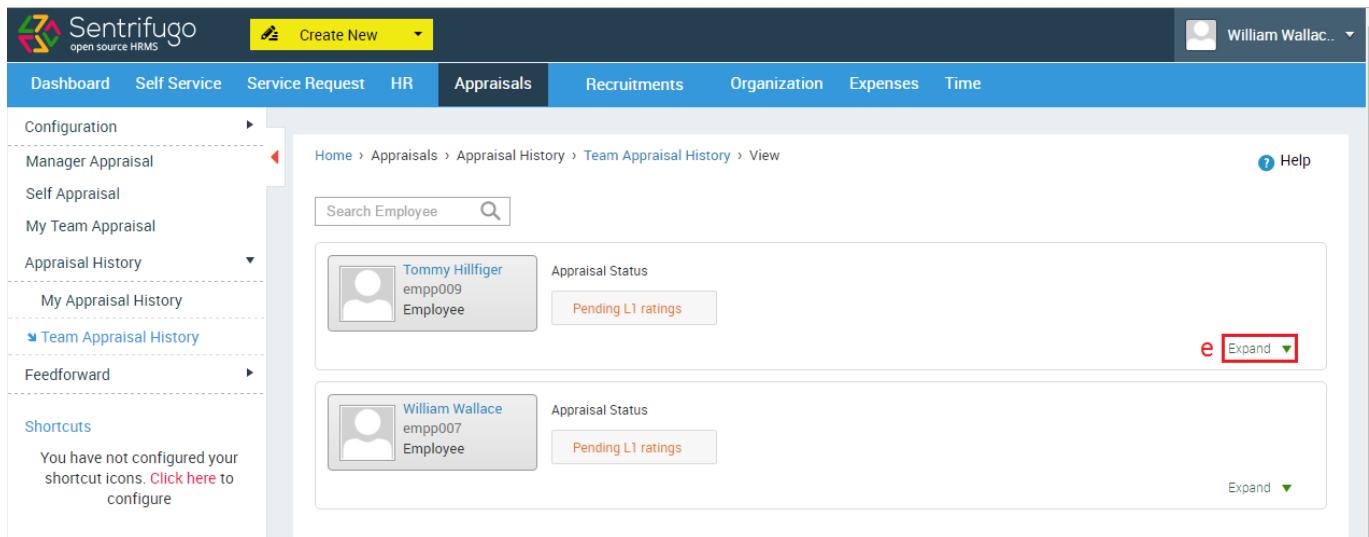


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals' (which is highlighted with a red box), 'Recruitments', 'Organization', 'Expenses', and 'Time'. On the right, there's a user profile for 'Johnty Rodhes'. The left sidebar has sections like 'Configuration', 'Manager Appraisal', 'Self Appraisal', 'My Team Appraisal', 'Appraisal History' (highlighted with a red box), 'My Appraisal History' (highlighted with a red box), 'Team Appraisal History' (highlighted with a red box), and 'Feedforward'. The main content area shows a 'Team Appraisal History' page with a table header: Action, Business Unit, Department, Financial Year, Appraisal Mode, Period. Below is a table row with 'Global Systems', 'IT', '2015-2016', 'Yearly', 'Yearly'. At the bottom are 'Records per page' (set to 20) and a search bar.

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

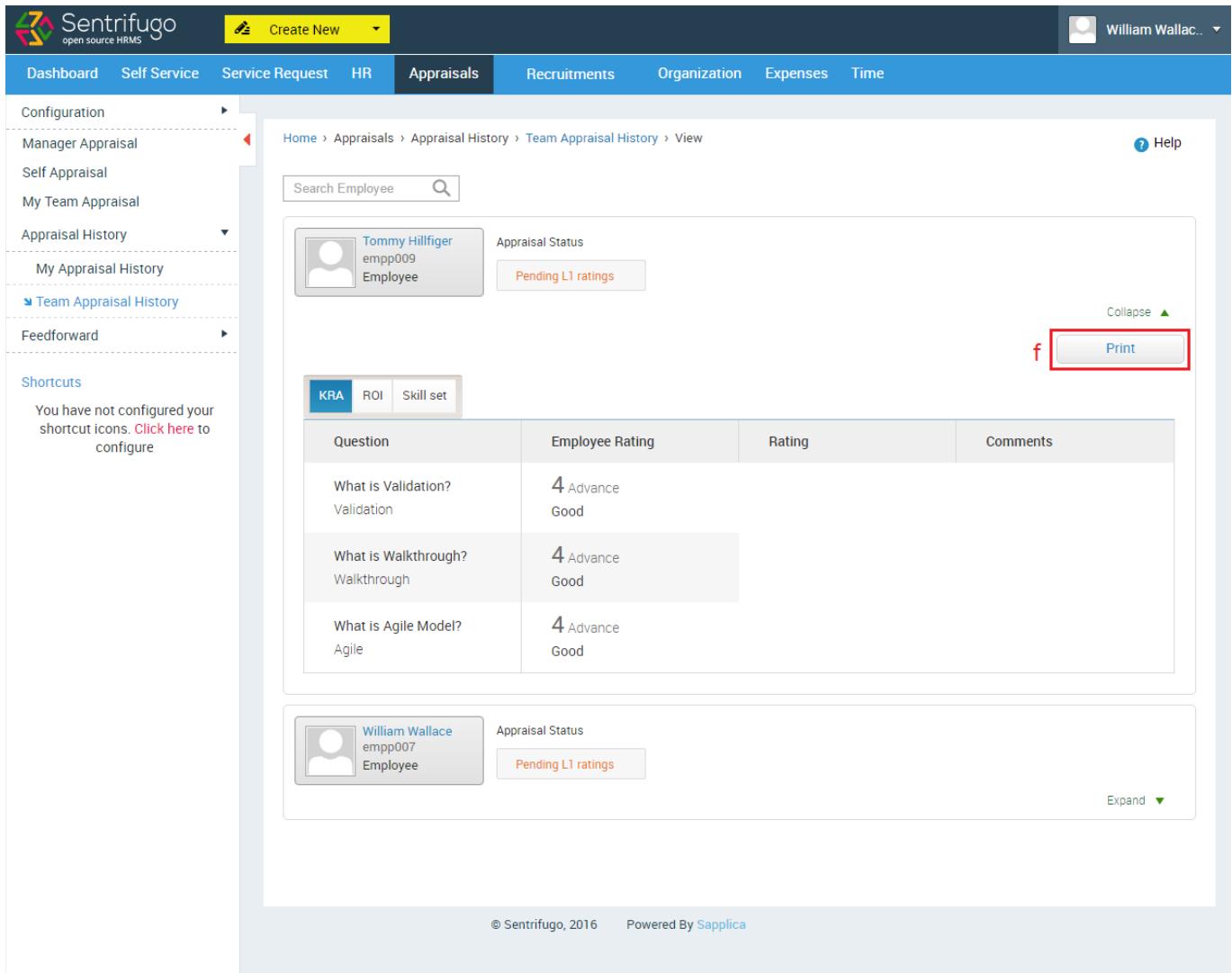


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Create New', 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals' (highlighted with a red box), 'Recruitments', 'Organization', 'Expenses', and 'Time'. On the right, there's a user profile for 'William Wallace'. The left sidebar has sections like 'Configuration', 'Manager Appraisal', 'Self Appraisal', 'My Team Appraisal', 'Appraisal History' (highlighted with a red box), 'My Appraisal History', 'Team Appraisal History' (highlighted with a red box), and 'Feedforward'. The main content area shows a 'Team Appraisal History' page with a search bar 'Search Employee'. It lists two employees: 'Tommy Hilfiger' (Pending L1 ratings) and 'William Wallace' (Pending L1 ratings). Each employee entry has an 'Expand' button (highlighted with a red box) to view more details.

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 the active tab), 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, the latter of which is expanded), Feedforward, and Shortcuts (which notes that no shortcut icons have been configured). A search bar labeled 'Search Employee' is located at the top of the main content area.

The main content area displays a 'Team Appraisal History' view for Tommy Hilfiger (emp009). It shows an 'Appraisal Status' of 'Pending L1 ratings'. Below this, there is a table with three rows, each representing a question and its rating. The table has columns for 'Question', 'Employee Rating', 'Rating', and 'Comments'. The questions are: 'What is Validation? Validation', 'What is Walkthrough? Walkthrough', and 'What is Agile Model? Agile'. The 'Rating' column for all three questions shows a value of '4' followed by the text 'Advance Good'.

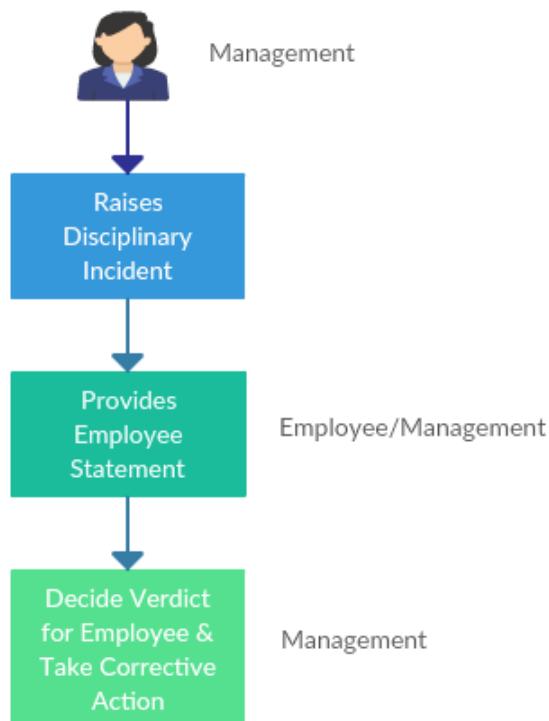
At the bottom of the main content area, there is another section for William Wallace (emp007) with an 'Appraisal Status' of 'Pending L1 ratings'. A red box highlights the 'Print' button in the top right corner of this section. The footer of the page includes copyright information: © Sentrifugo, 2016 and Powered By Sapplica.

Figure 249

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

17. Disciplinary Incident Management

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



Process Description:

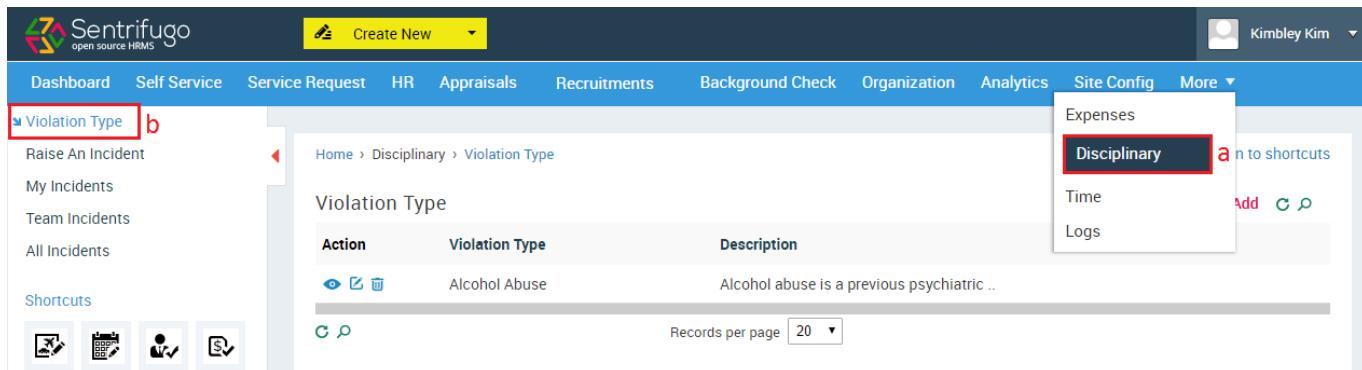
- User (Management) raises a disciplinary incident against an employee
- Employee can provide his/her appeal statement
- If the employee does not provide his/her appeal statement within the expiry date, then he/she will not be able to provide the appeal statement. In that case the User (Management) can 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

17.1 How do I create a Violation Type?



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

Please refer Figure 250

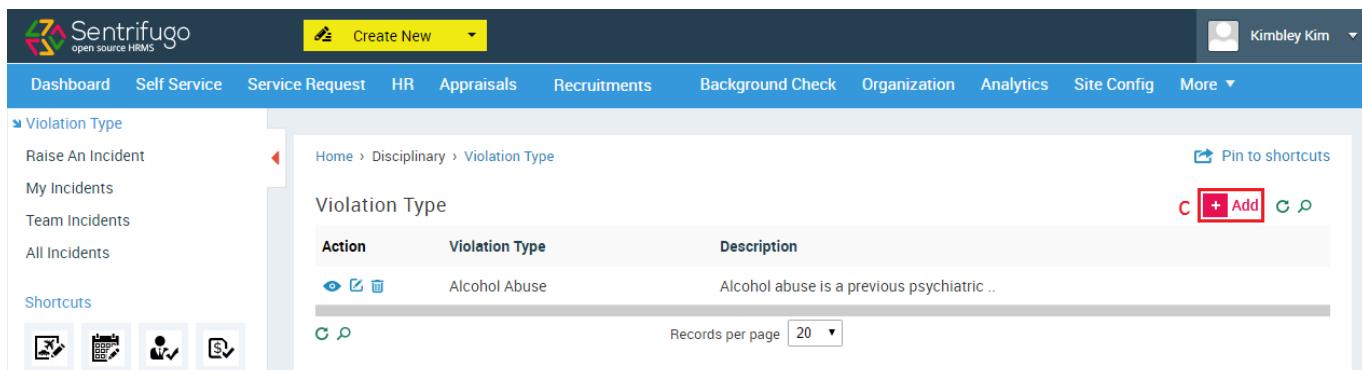


The screenshot shows the Sentrifugo application interface. The top navigation bar includes links for Create New, Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The 'More' dropdown is open, showing options like 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 ..'. There are also buttons for Add, Edit, and Delete.

Figure 250

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

Please refer Figure 251

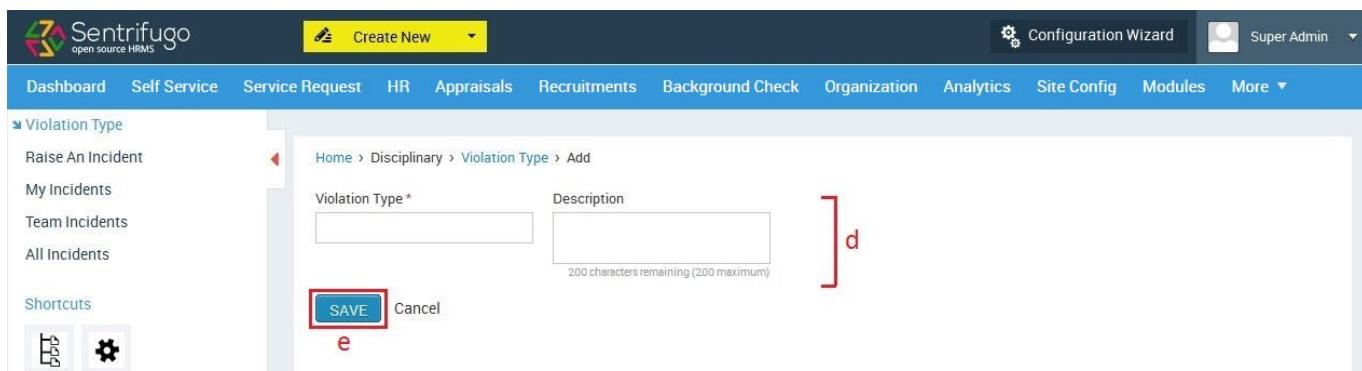


This screenshot is identical to Figure 250, showing the 'Violation Type' grid. The difference is in the top right corner of the grid, where a red box labeled 'c' highlights the '+Add' button.

Figure 251

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

Please refer Figure 252



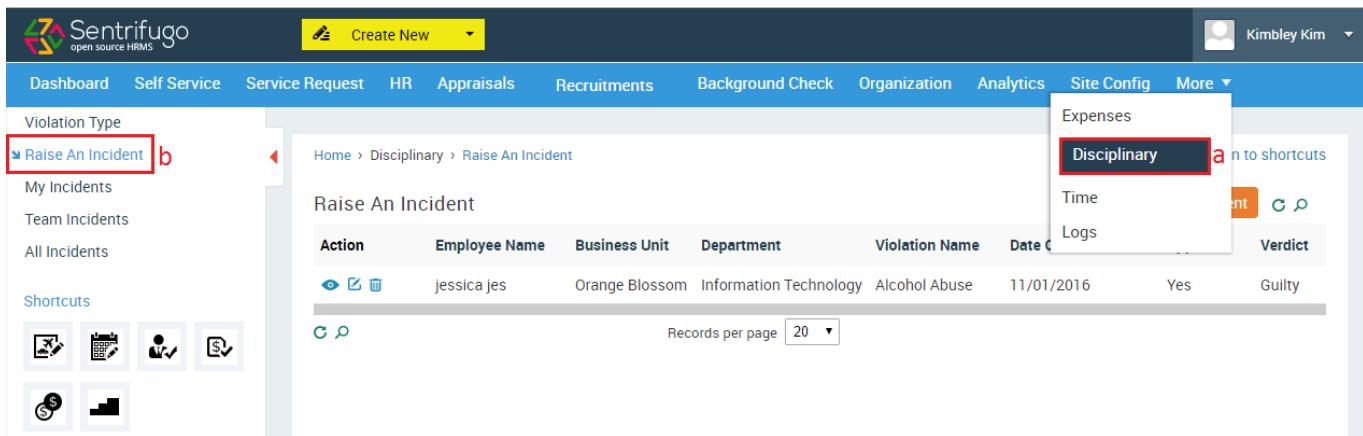
This screenshot shows the 'Add' form for a new violation type. It has two input fields: 'Violation Type *' and 'Description'. The 'Description' field contains the placeholder '200 characters remaining (200 maximum)'. At the bottom, there are 'SAVE' and 'Cancel' buttons. A red bracket labeled 'd' points 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



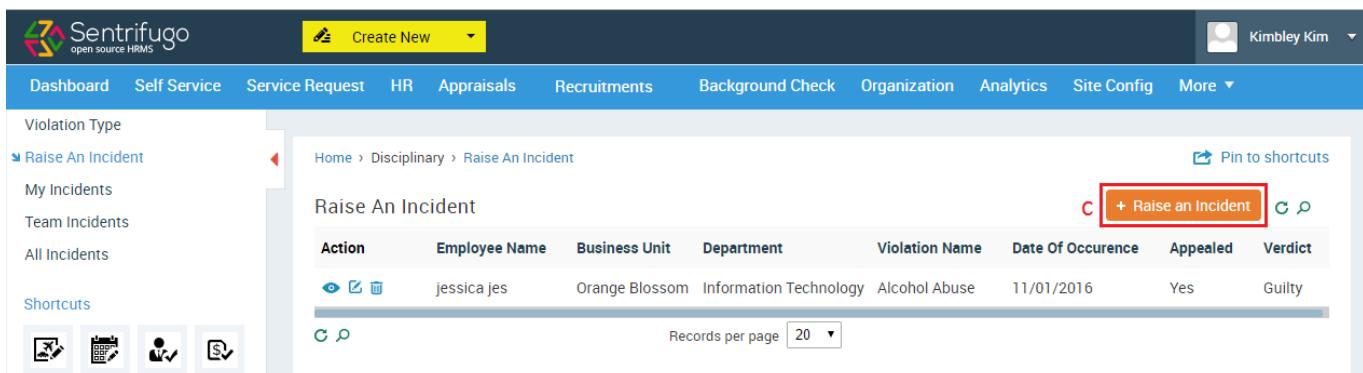
The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A dropdown menu for 'Disciplinary' is open, showing options like Expenses, Time, Logs, and Verdict. On the left sidebar, there's a 'Violation Type' section with a 'Raise An Incident' link, which is also highlighted with a red box. Below it are links for My Incidents, Team Incidents, and All Incidents. A 'Shortcuts' section contains icons for various HR functions. The main content area displays a grid titled 'Raise An Incident' with columns for Action, Employee Name, Business Unit, Department, Violation Name, Date Of Occurrence, Appealed, and Verdict. One row is visible with the following data:

Action	Employee Name	Business Unit	Department	Violation Name	Date Of Occurrence	Appealed	Verdict
	jessica jes	Orange Blossom	Information Technology	Alcohol Abuse	11/01/2016	Yes	Guilty

Figure 253

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

Please refer Figure 254

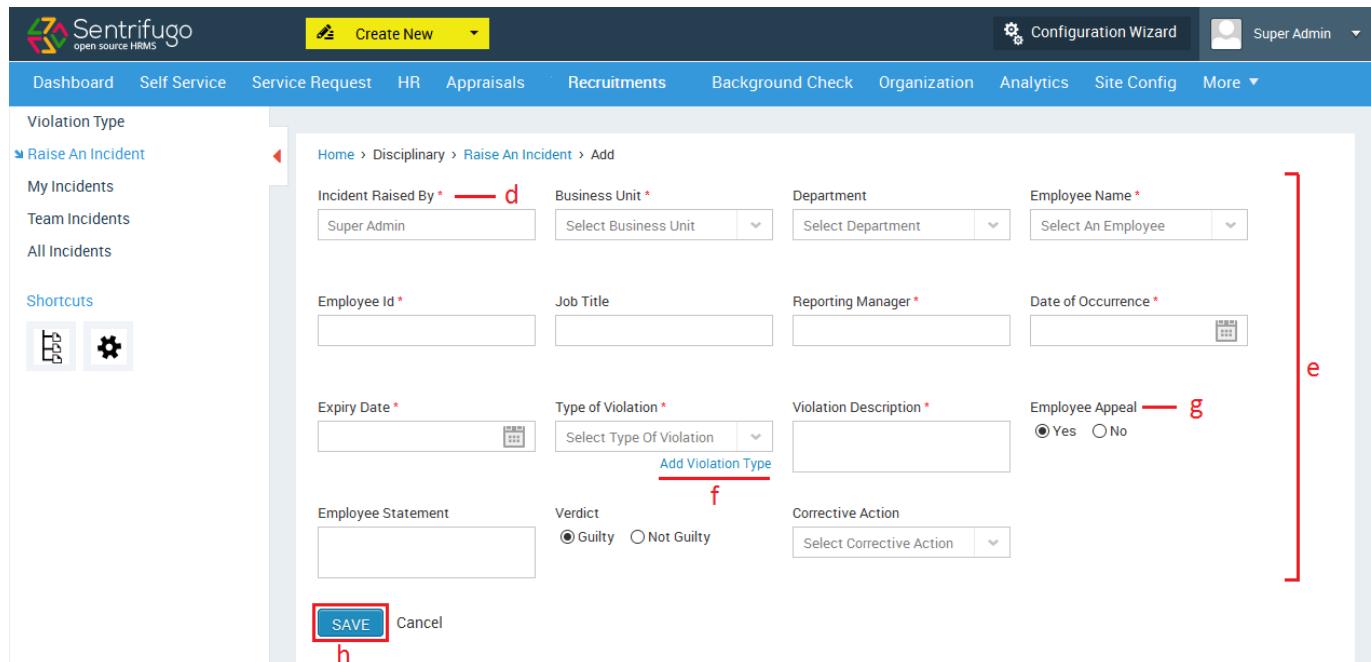


This screenshot is similar to Figure 253, showing the 'Raise An Incident' grid. The 'Raise An Incident' link in the left sidebar and the 'Disciplinary' link in the top navigation bar are present. The grid header includes a new button labeled '+ Raise an Incident' in a red box. The grid itself has the same columns and data as Figure 253.

Figure 254

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

Please refer Figure 255



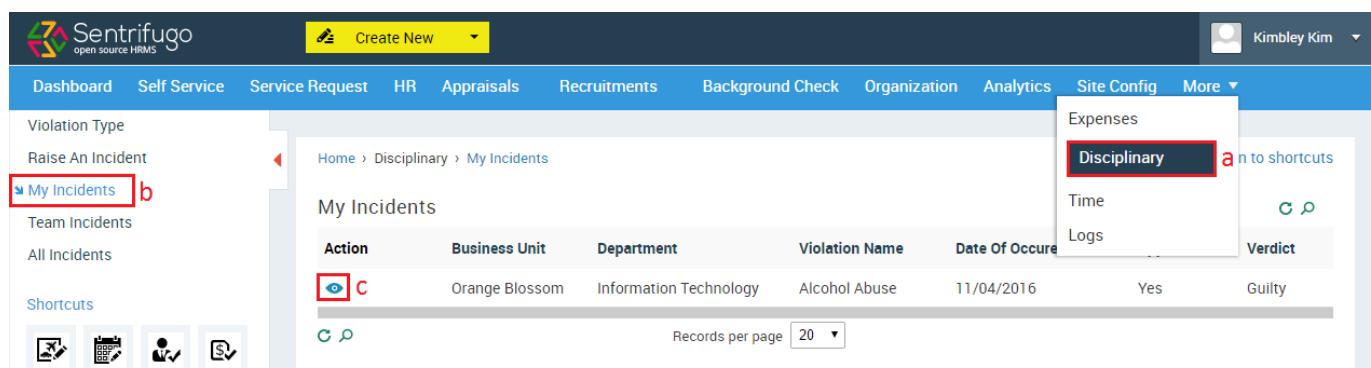
The screenshot shows the 'Raise An Incident' form. The 'Incident Raised By' field is populated with 'Super Admin' (labeled 'd'). The 'Employee Appeal' section has two radio buttons: 'Yes' (labeled 'g') and 'No'. The 'SAVE' button at the bottom left is highlighted with a red box (labeled 'h'). A red bracket labeled 'e' covers the 'Reporting Manager' and 'Date of Occurrence' fields. A red arrow labeled 'f' points to the 'Add Violation Type' link.

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

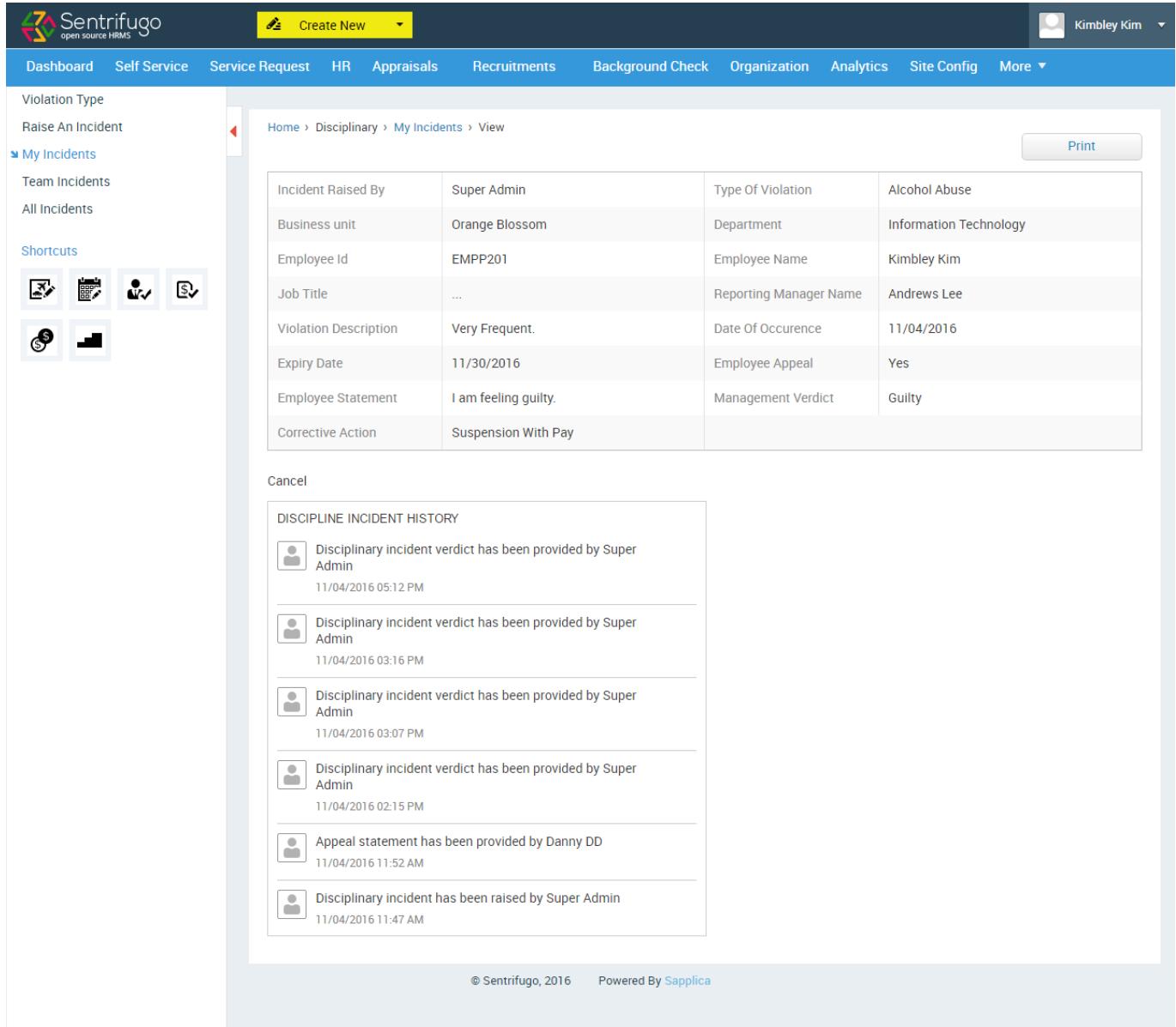


The screenshot shows the 'My Incidents' list. The table columns are: Action, Business Unit, Department, Violation Name, Date Of Occur, Verdict, and Employee Name. A red box labeled 'b' covers the 'My Incidents' link in the sidebar. A red box labeled 'c' covers the eye icon in the table header. A red bracket labeled 'a' covers the 'Disciplinary' link in the top right corner of the sidebar.

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 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. A user profile for 'Kimbley Kim' is at the top right. Below the navigation is a sidebar with 'My Incidents' selected, showing options like Team Incidents and All Incidents. The main content area has a breadcrumb trail: Home > Disciplinary > My Incidents > View. A 'Print' button is in the top right of this area. The main content is a table with the following data:

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

Below the table is a section titled 'DISCIPLINE INCIDENT HISTORY' containing a list of events:

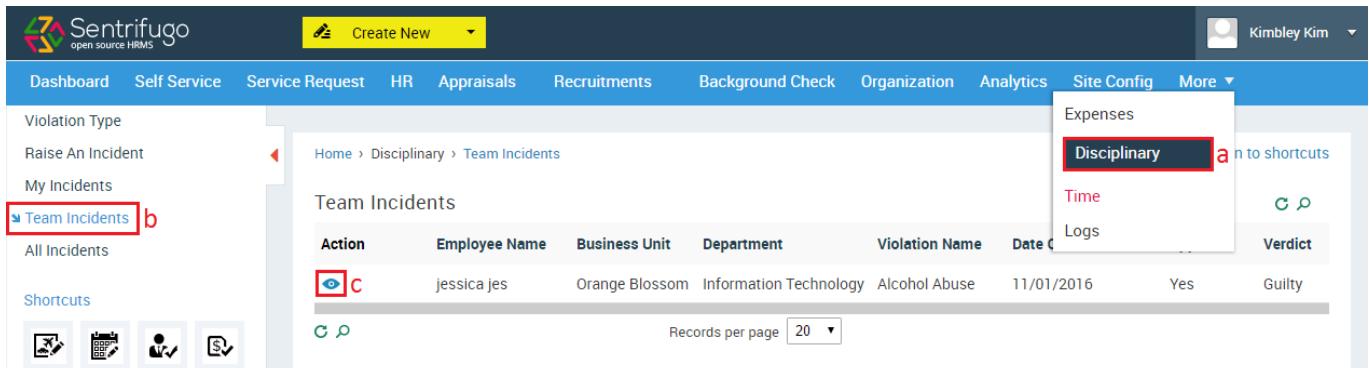
- Disciplinary incident verdict has been provided by Super Admin 11/04/2016 05:12 PM
- Disciplinary incident verdict has been provided by Super Admin 11/04/2016 03:16 PM
- Disciplinary incident verdict has been provided by Super Admin 11/04/2016 03:07 PM
- Disciplinary incident verdict has been provided 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 power information: © Sentrifugo, 2016 Powered By Sapplica

Figure 257

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

Please refer Figure 258

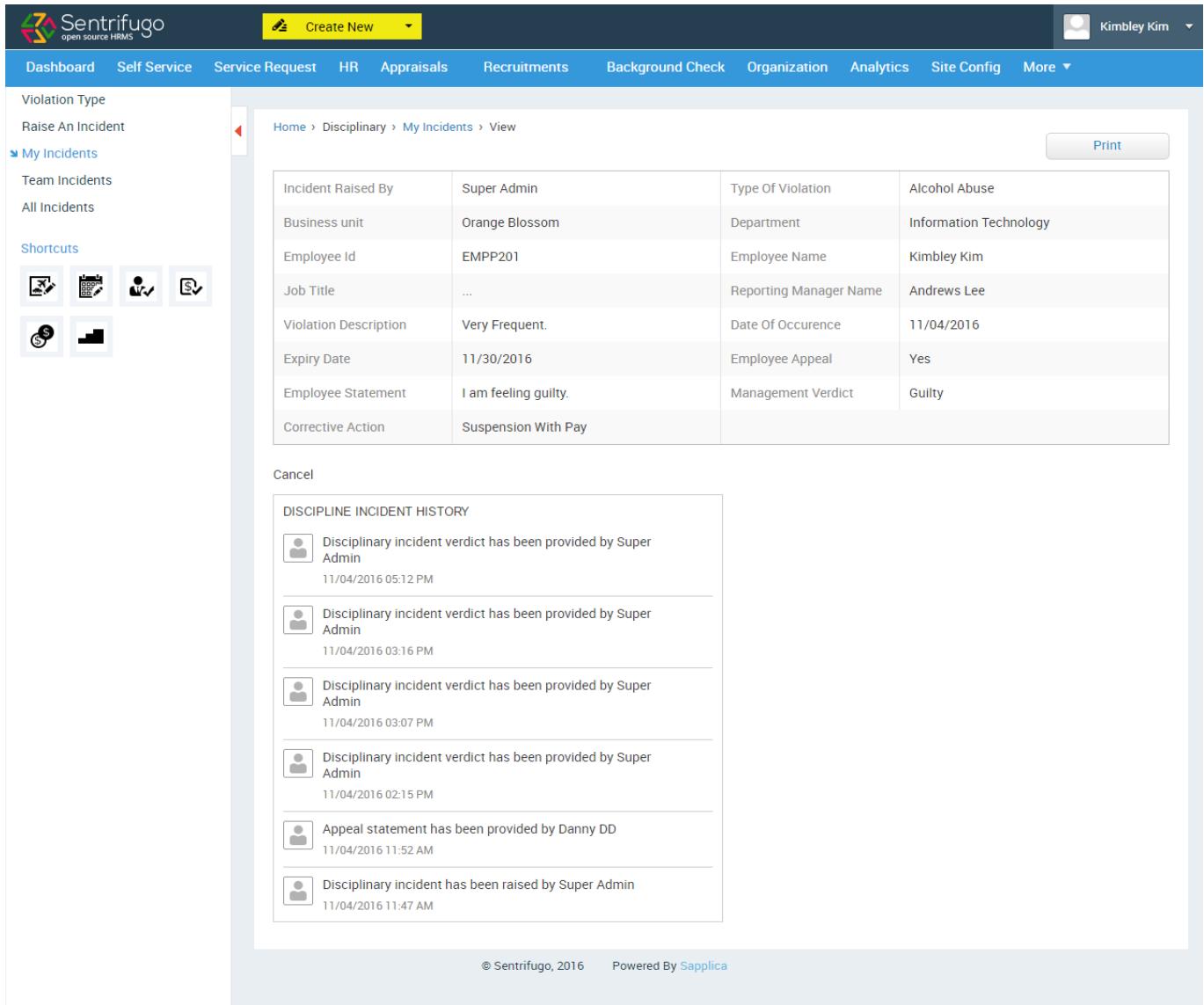


The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A dropdown menu under 'More' is open, showing options like Expenses, 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 details for an incident involving 'jessica jes'. At the bottom left, a sidebar lists 'Team Incidents' (highlighted in red), All Incidents, and Shortcuts.

Figure 258

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

Please refer Figure 259



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar and sidebar are identical to Figure 258. The main content area shows a detailed view of an incident. The table contains the following data:

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

Below the table, a section titled 'DISCIPLINE INCIDENT HISTORY' shows a list of events:

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

Figure 259

17.5 How do I provide my appeal statement?

Please refer Figure 260

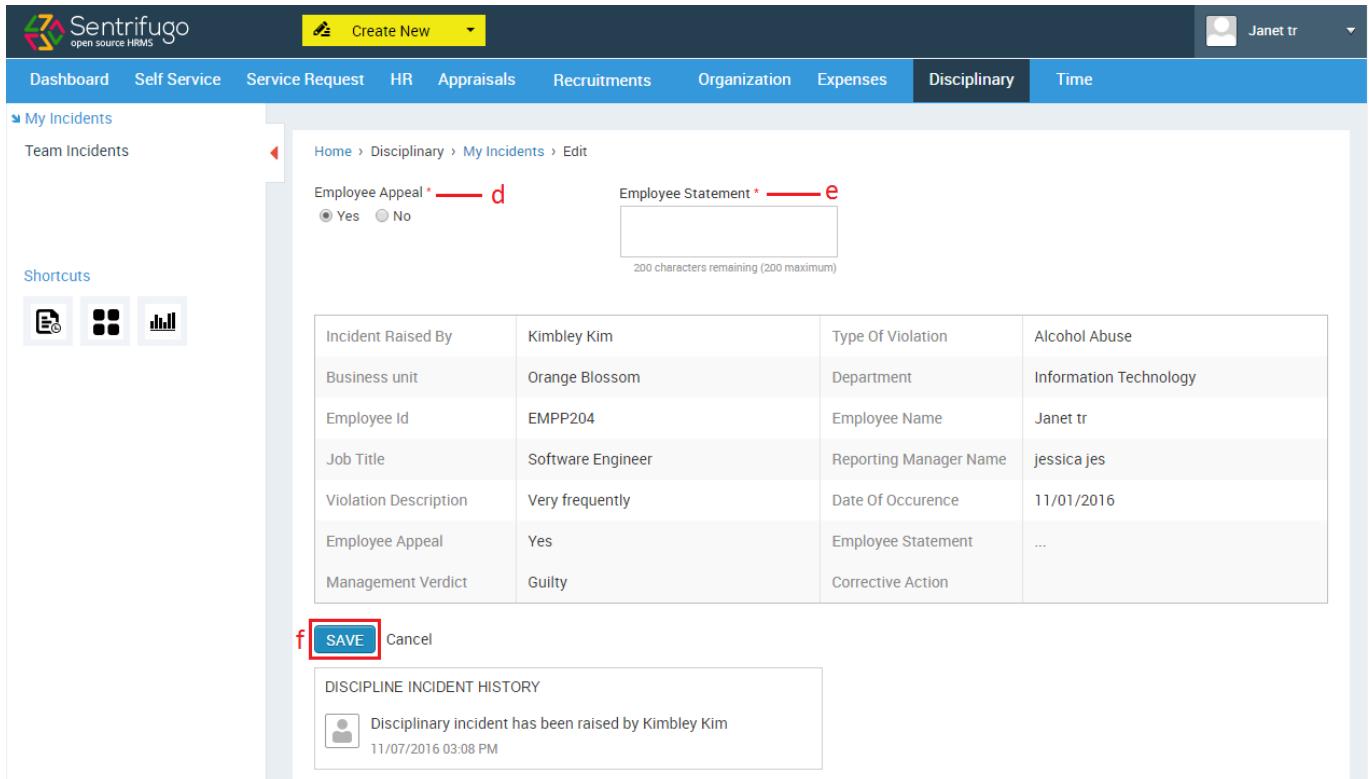


The screenshot shows the Sentrifugo web interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses, **Disciplinary** (which is highlighted with a red box), and Time. A user profile for 'Janet tr' is at the top right. On the left, a sidebar has 'My Incidents' (highlighted with a red box) and 'Team Incidents'. The main content area shows a table titled 'My Incidents' with columns: Action, Business Unit, Department, Violation Name, Date Of Occurrence,Appealed, and Verdict. One row is visible: Action (edit icon highlighted with a red box), 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 'Records per page' dropdown and a 'Pin to shortcuts' link.

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 an 'Employee Appeal' section with radio buttons for 'Yes' (highlighted with a red box) and 'No'. An 'Employee Statement' text area is present with a character limit of 200 (highlighted with a red box). Below this is a table with various incident details. At the bottom, there are 'SAVE' and 'Cancel' buttons, 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

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. On the left, a sidebar titled 'Violation Type' lists 'Raise An Incident' (highlighted with a red box), My Incidents, Team Incidents, All Incidents, and Shortcuts. The main content area shows a 'Raise An Incident' form with fields for Action (with a red box around the edit icon), Employee Name, Business Unit, Department, Violation Name, Date Of Offense, Verdict (Yes/No), and Guilty. A callout box points to the 'Disciplinary' menu item in the top right with the note: 'Only a Super Admin/Management can provide an appeal statement for other employees (if they're unavailable)'.

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

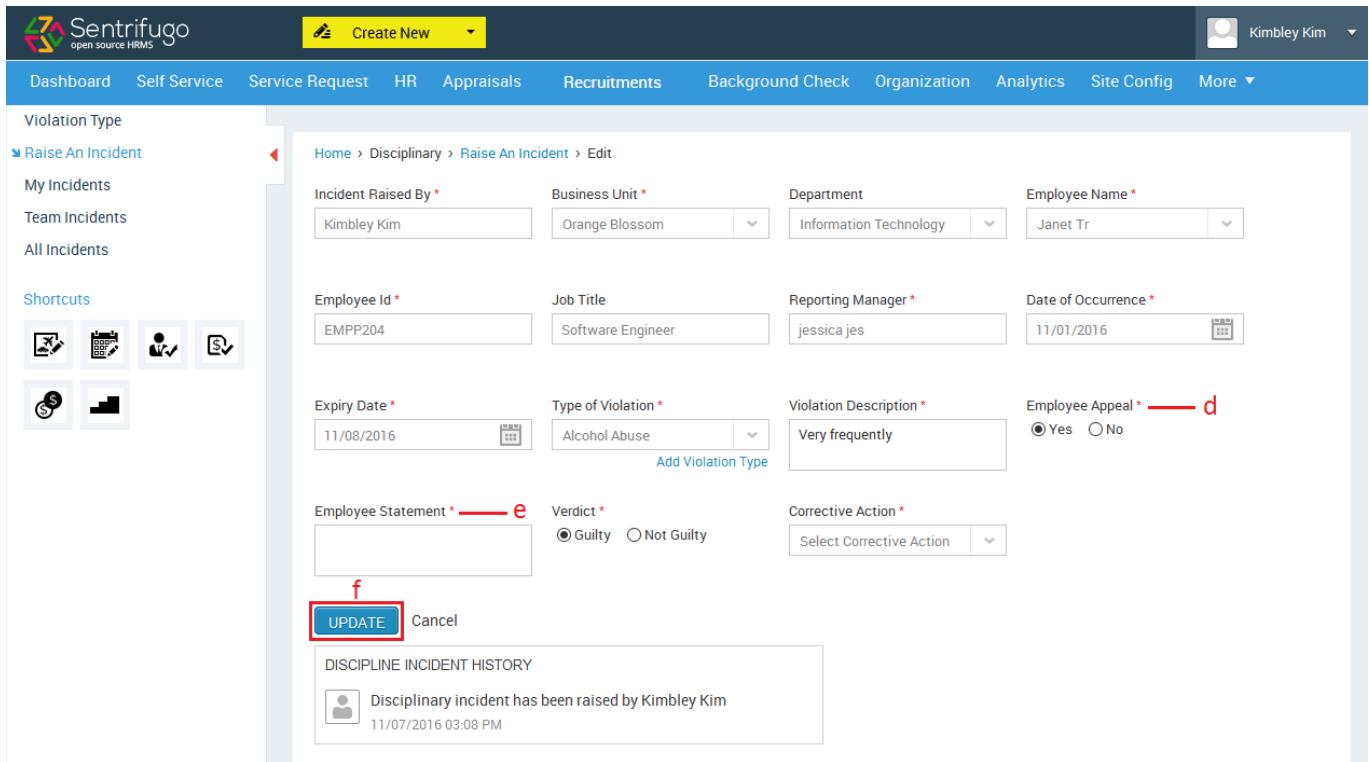


Figure 263

- 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

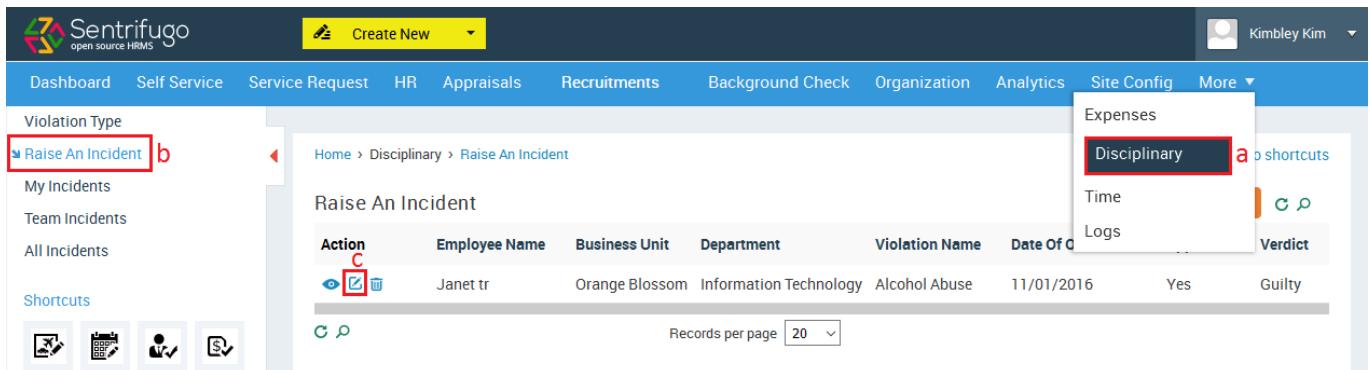
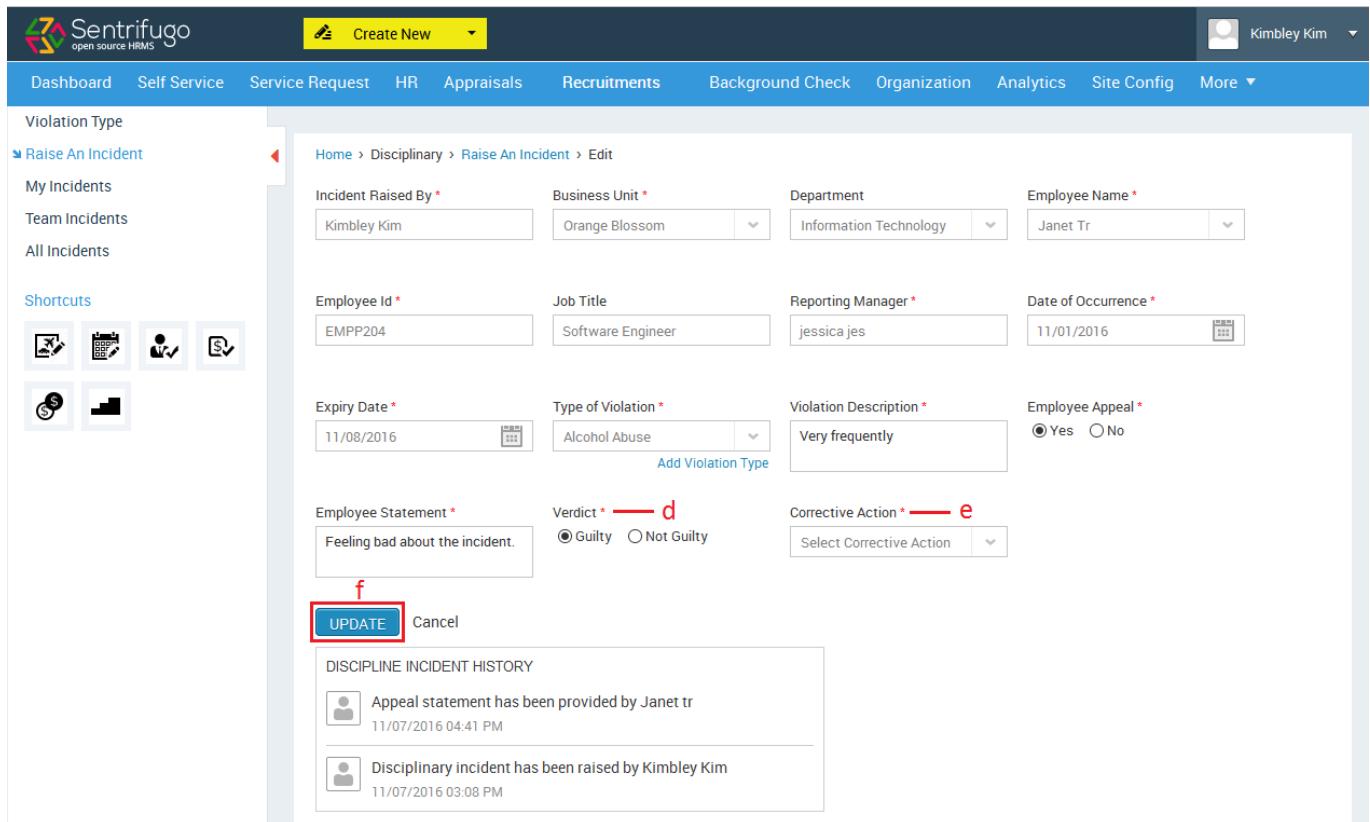


Figure 264

- 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 in the Sentrifugo Disciplinary module. The left sidebar has 'Raise An Incident' selected. The main 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, there is a 'DISCIPLINE INCIDENT HISTORY' section with 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

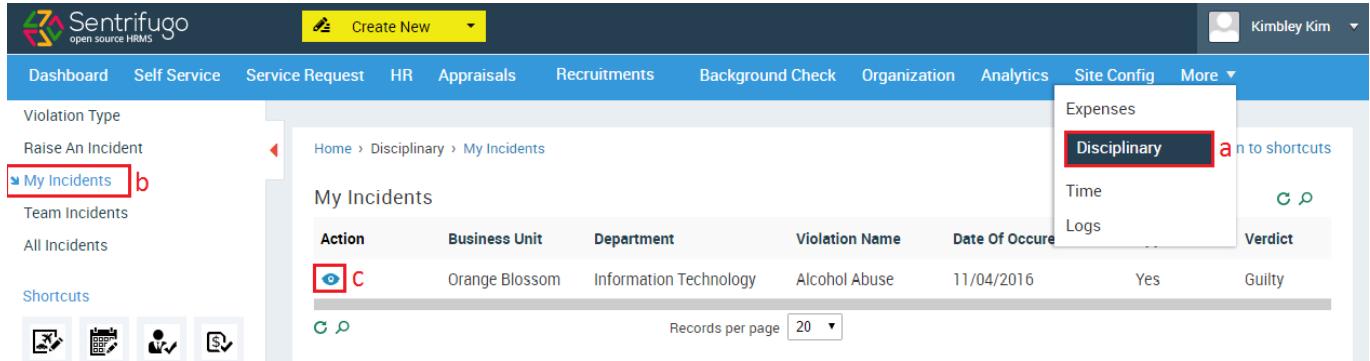
A red box highlights the 'UPDATE' button.

Figure 265

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

17.8 How do I print my disciplinary incident?

Please refer Figure 266



The screenshot shows the 'My Incidents' page in the Sentrifugo Disciplinary module. The left sidebar has 'My Incidents' selected. The main table displays one incident:

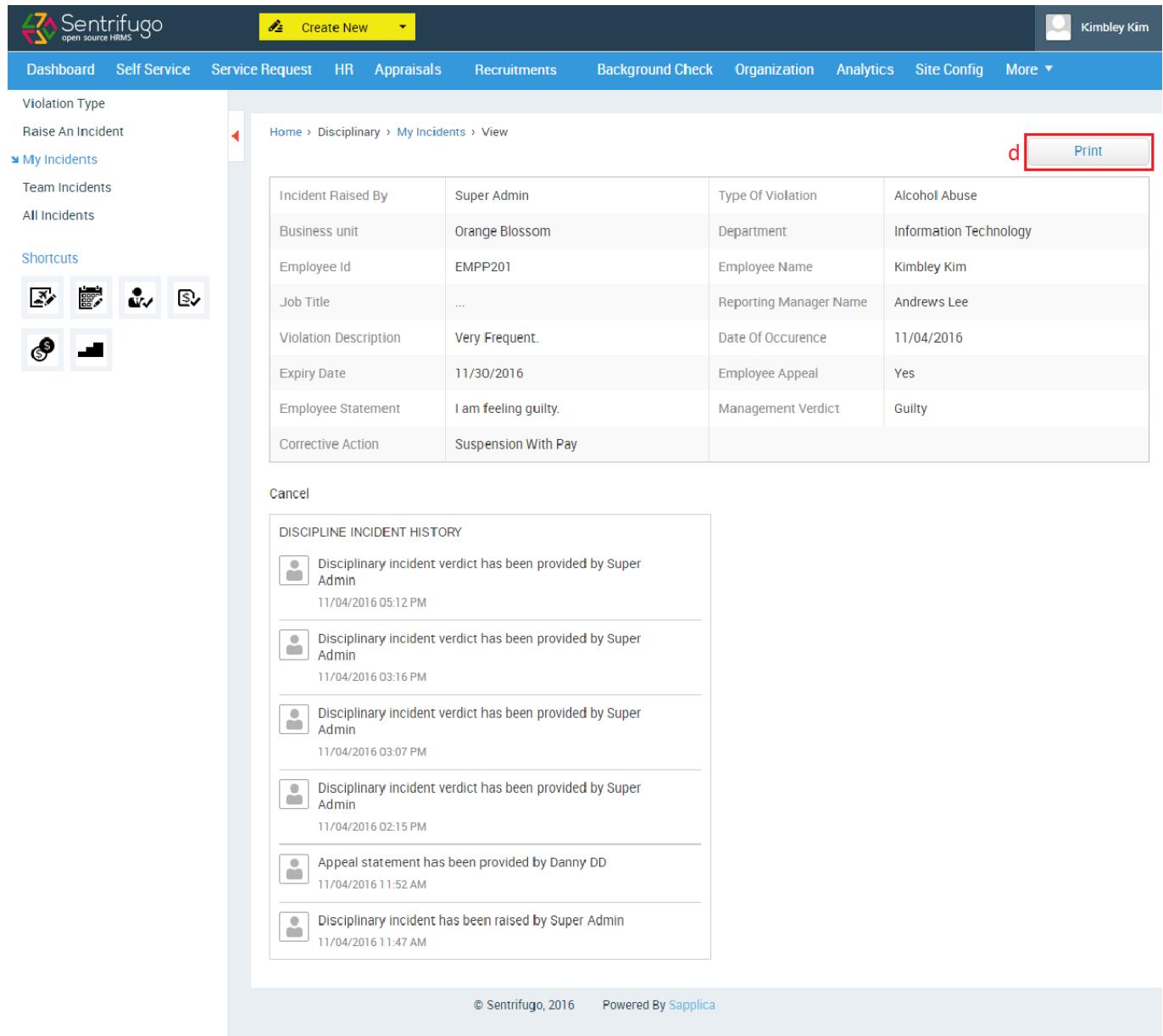
Action	Business Unit	Department	Violation Name	Date Of Occure	Yes	Guilty
	Orange Blossom	Information Technology	Alcohol Abuse	11/04/2016		

A red box highlights the 'Disciplinary' menu item in the top right corner.

Figure 266

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

Please refer Figure 267



The screenshot shows the Sentrifugo 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), Team Incidents, All Incidents, and Shortcuts (with icons for tasks like add, calendar, users, and export). The main content area displays a 'My Incidents' view for 'Kimbley Kim'. It includes a breadcrumb trail: Home > Disciplinary > My Incidents > View. A 'Print' button is highlighted with a red box. Below the breadcrumb, a table lists details of a disciplinary incident:

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

Below the table, a 'Cancel' link is visible. Underneath the table, a section titled 'DISCIPLINE INCIDENT HISTORY' lists several events with icons and timestamps:

- 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)

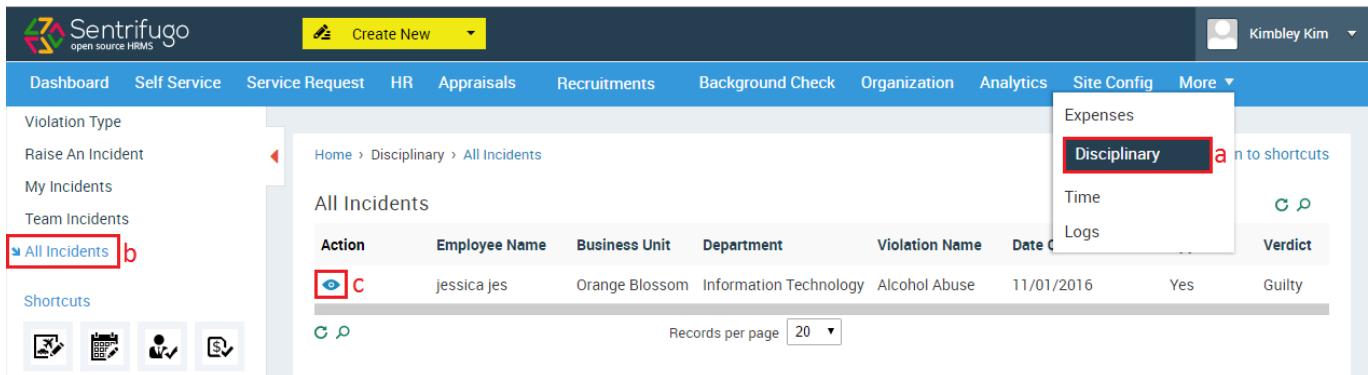
At the bottom of the page, there are copyright and powered-by links: © Sentrifugo, 2016 and Powered By Sapplica.

Figure 267

d. Click **Print** button

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

Please refer Figure 268

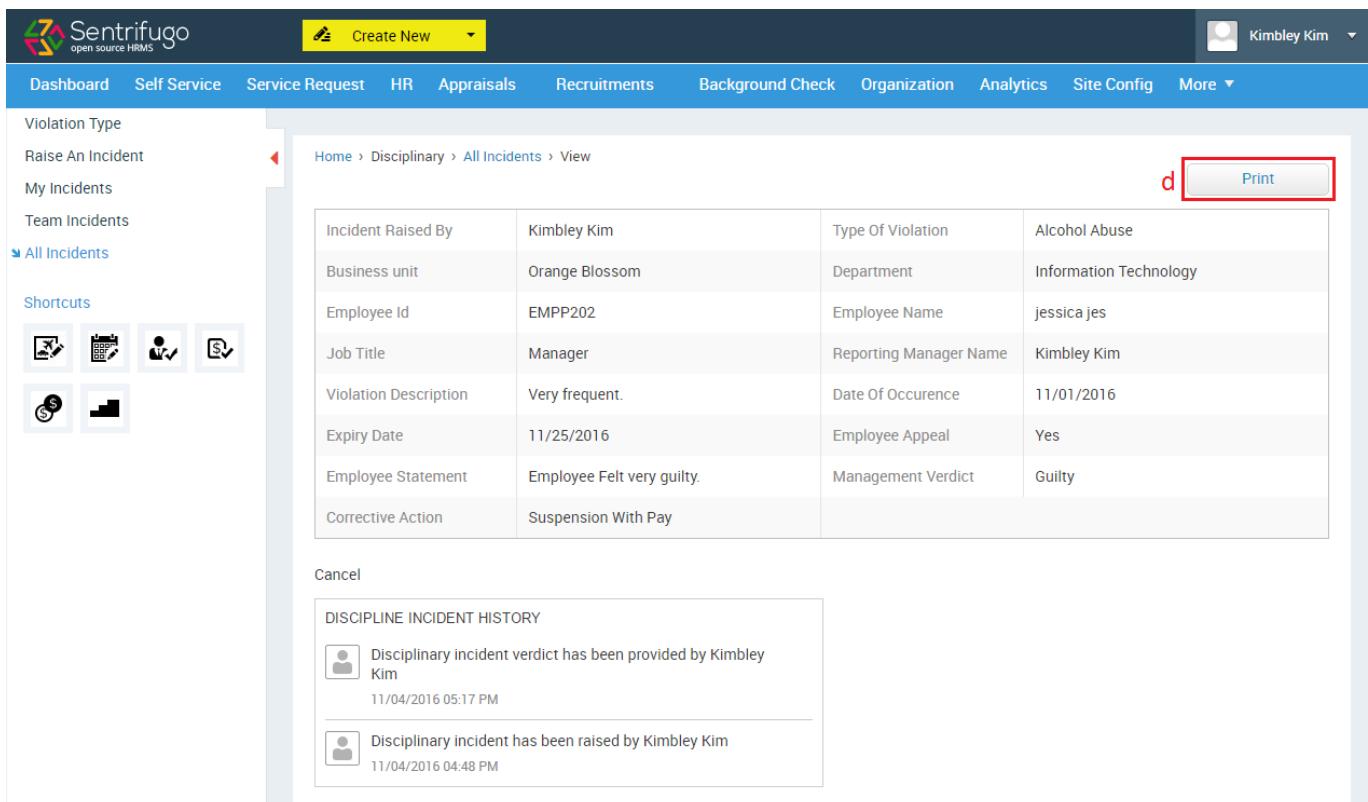


Action	Employee Name	Business Unit	Department	Violation Name	Date Of Occurrence	Employee Appeal	Management Verdict
	jessica jes	Orange Blossom	Information Technology	Alcohol Abuse	11/01/2016	Yes	Guilty

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



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

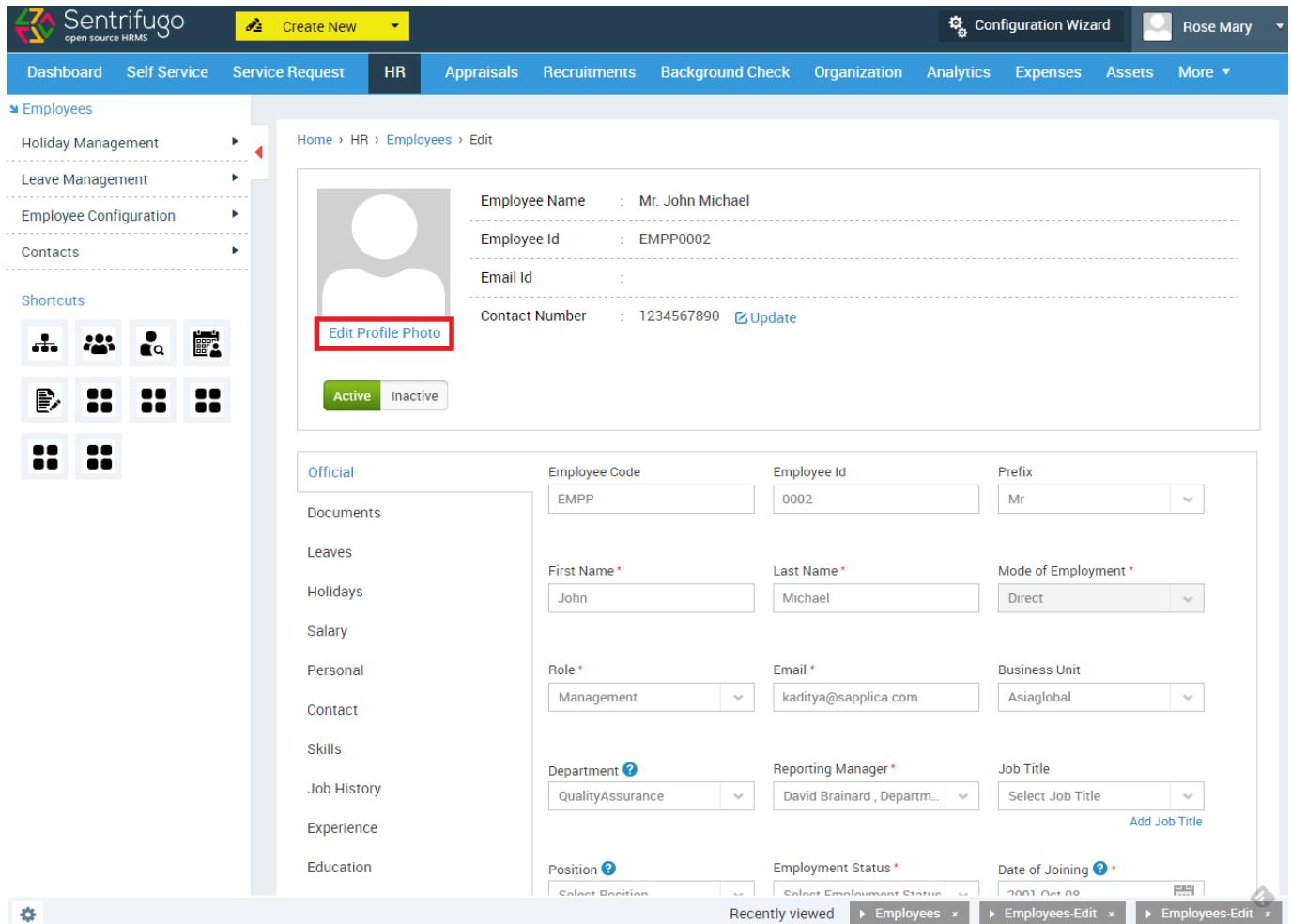
Figure 269

- 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 Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Expenses, Assets, and More. A configuration wizard icon and a user profile for 'Rose Mary' are also present. The main content area is titled 'Employees' and shows a list of management-related items like Holiday Management, Leave Management, Employee Configuration, and Contacts. On the right, the 'Edit' screen for an employee named 'Mr. John Michael' is displayed. The employee's details include Employee Name (Mr. John Michael), Employee Id (EMPP0002), Email Id (empty), and Contact Number (1234567890). An 'Edit Profile Photo' button is highlighted with a red box. Below this, there are tabs for Active (selected) and Inactive. Further down, there are sections for Official (Employee Code: EMPP, Employee Id: 0002, Prefix: Mr), Personal (First Name: John, Last Name: Michael, Mode of Employment: Direct), and various other job-related fields like Role, Email, Business Unit, Department, Reporting Manager, Job Title, Position, Employment Status, and Date of Joining. At the bottom, there are buttons for Recently viewed, Employees, and a breadcrumb trail showing the current page path.

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](#)

 **Configure Leave Types**

Configure the leave types used in your organization.

In Progress

 **Configure Holidays**

Configure the holidays used in your organization.

In Progress

 **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](#)

 **Configure Leave Types**

Configure the leave types used in your organization.

Completed

 **Configure Holidays**

Configure the holidays used in your organization.

In Progress

 **Appraisals**

Configure the performance appraisal parameters used in your organization.

In Progress

Configure Holidays

Holiday Group * Select Holiday Group | ▾

[Add Holiday Group](#)

Holiday * Date ? * 

[ADD HOLIDAY](#)

SAVE

< Prev **Next >**

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

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

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

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

Configure Performance Appraisal

Appraisal Parameter *
 |

[Add Parameter](#)

Question *
ADD QUESTION

Description
200 characters remaining (200 maximum)

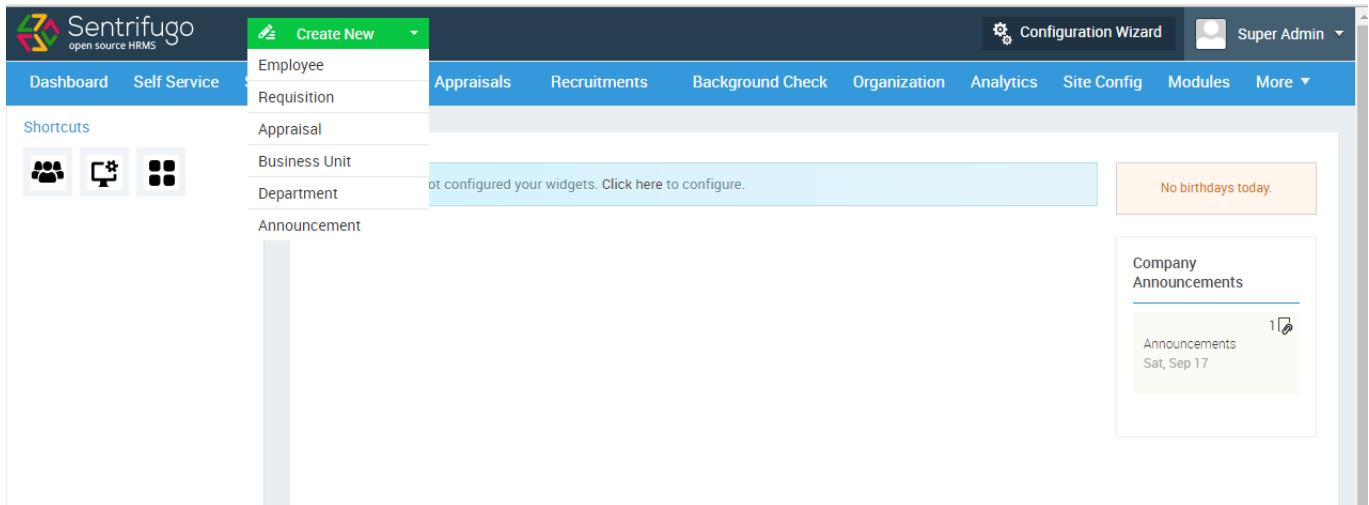
SAVE

[◀ Prev](#)

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

Create New Shortcut Button

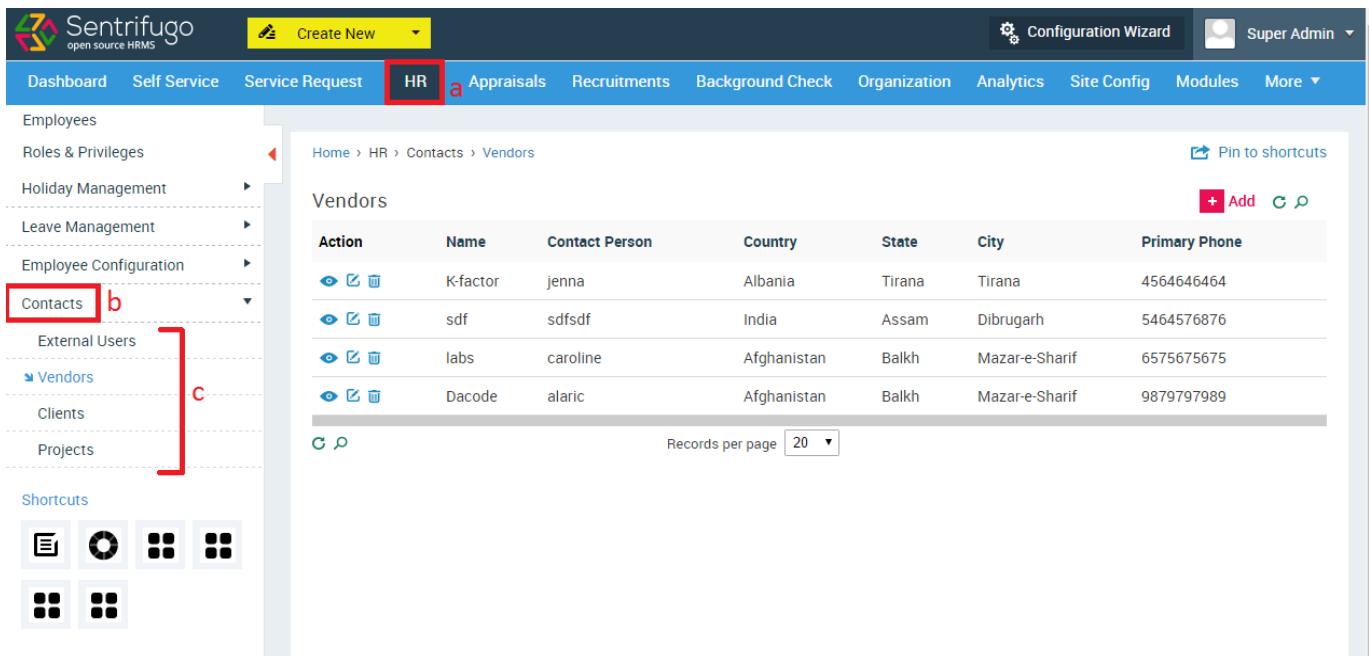
This shortcut button is placed on the top left corner (beside your organization logo) of the application. This button has been designed to save your time from menu redirections. The number of options displayed depends on a user's role privileges. For example, if you belong to the Management role group, 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 includes "Dashboard", "Self Service", "Employee", "Requisition", "Appraisal", "Business Unit", "Department", and "Announcement". A message box says "You have not configured your widgets. Click here to configure." In the center, there's a "Company Announcements" section with one announcement for "Announcements" dated "Sat, Sep 17".

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 has 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 "Employees" with sections for "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". A red bracket on the right points from the "Vendors" label to the "Vendors" section in the main content area. The main content area shows a list of "Vendors" with columns for Action, Name, Contact Person, Country, State, City, and Primary Phone. The list includes 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 of the list table.

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