

# Sentrifugo

## User Guide

# Table of Content

Getting Started .....	4
What is Configuration Wizard.....	4
How do I go about the Configuration Wizard.....	4
How to Set Site Configurations within the Application: .....	7
How to Edit Site Configurations within the Application: .....	8
Need to Delete Site Configurations within the Application:.....	9
To Set Employee Configurations: .....	10
To Edit an Employee Configuration:.....	11
To Delete an Employee Configuration: .....	12
Want to Configure Tabs for Employees: .....	13
Do You Want to Add an Organization: .....	14
How do I Set Site Preferences: .....	18
How to Activate and In-activate Modules: .....	19
Do you want to Add Roles & Privileges:.....	20
How do I Add an External User:.....	22
How do I Add an Employee:.....	23
How can I Update My Details:.....	26
How to Add Employee Documents:.....	28
Want to Add Leave Management Options:.....	29
What if I want to Apply a Leave Request:.....	31
How do I Cancel my Leave Request: .....	33
How to Approve or Reject Leave Requests:.....	34
How do I Raise a Resource Requisition: .....	35
Where do I Add Screening Type for Background Checks: .....	37
How do I Add an Agency to Perform Background Checks: .....	38
Can I Send an Employee for Background Checks: .....	40
Want to View & Generate Reports: .....	41
Where can you View Activity log: .....	44
Where can I View User log:.....	44
Looking to Set Shortcuts:.....	45
Looking to Set Widgets: .....	46

Want to Configure Service Request: .....	48
Want to Edit Service Request: .....	49
How to Delete Service Request: .....	50
How do I set Cron Jobs:.....	51
How to Download Import Format .....	52
From where do I pick the Import format details .....	53
Performance Appraisal.....	63
Appraisal Settings.....	64
Parameters .....	65
Questions .....	66
Skills .....	67
Ratings .....	68
Initialize Appraisal.....	69
Configure Line Managers.....	71
Discard Line Manager Configuration.....	75
Configure Appraisal Parameters .....	76
Manager Appraisal.....	81
Manager Status .....	85
Employee Status.....	86
My Team Appraisal.....	86
Self Appraisal .....	88
Feed Forward .....	89
Questions .....	89
Initialize feed forward.....	90
Appraise Your Managers .....	92
Manager Feed Forward .....	93
Employee Status.....	95

# Getting Started

## What is Configuration Wizard

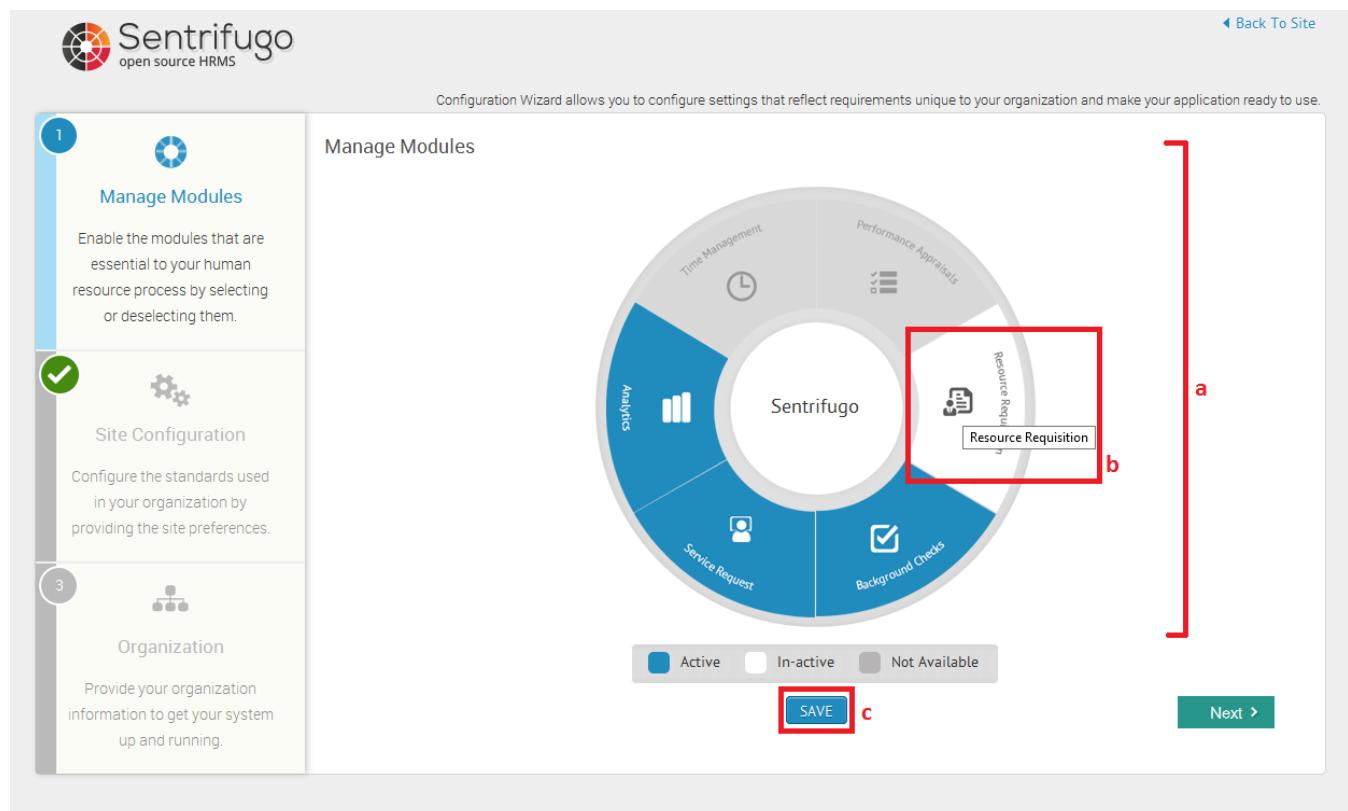
Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use. Wizard is the first screen that is displayed if you have logged into the application for the very first time. Wizard enables you to enter the essential information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

## How do I go about the Configuration Wizard

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

- All the modules are displayed in circular representation
- Click on the module icon to make it active or inactive
- Click on Save to save the changes made.

For further understanding, refer Figure 1

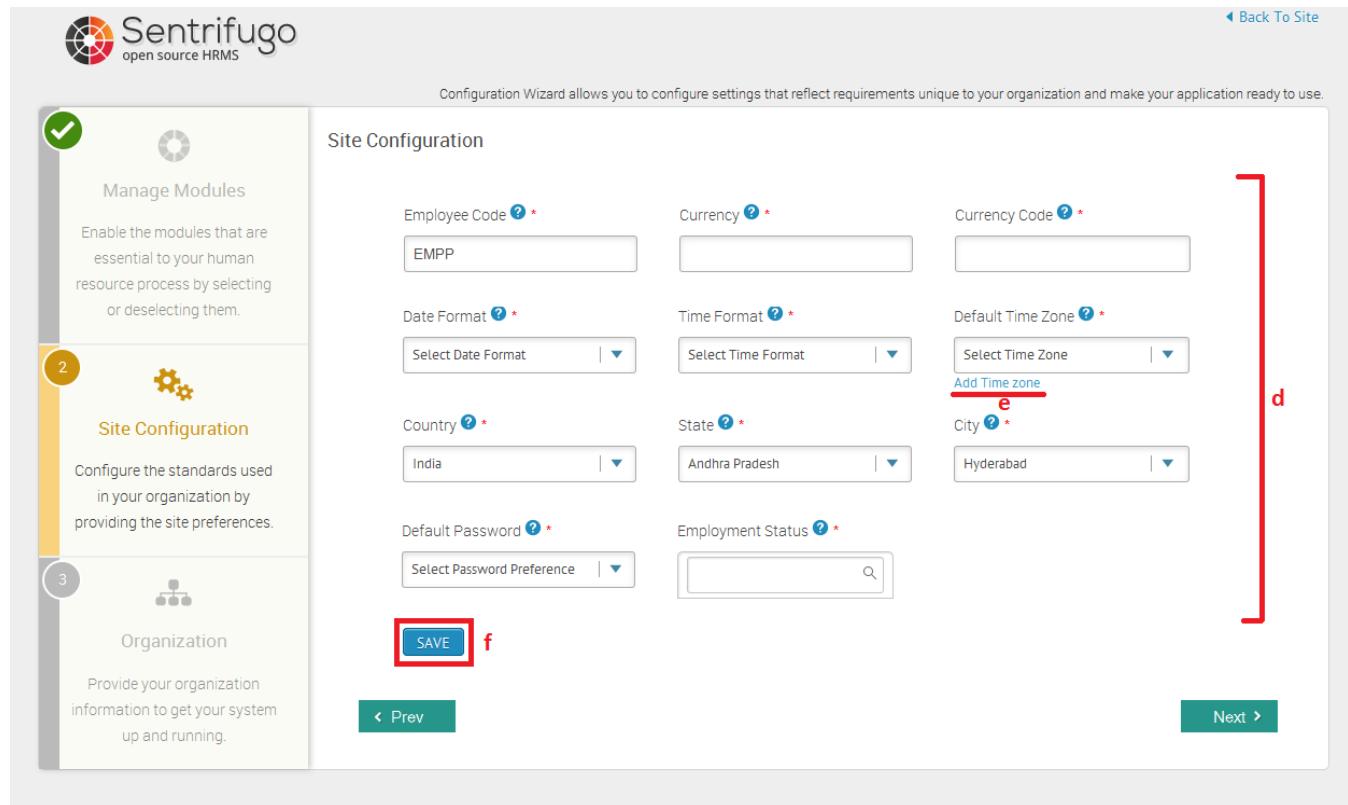


Refer Figure 1

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

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

For further understanding, refer Figure 2



The screenshot shows the Sentrifugo Configuration Wizard on the 'Site Configuration' page. The left sidebar has three tabs: 'Manage Modules' (selected), 'Site Configuration' (step 2), and 'Organization' (step 3). The main area displays configuration settings:

- Employee Code**: EMPP
- Currency**: (empty)
- Currency Code**: (empty)
- Date Format**: Select Date Format
- Time Format**: Select Time Format
- Default Time Zone**: Select Time Zone (with a red bracket 'd' over it) and a link to 'Add Time zone'
- Country**: India
- State**: Andhra Pradesh
- City**: Hyderabad
- Default Password**: Select Password Preference
- Employment Status**: (empty)

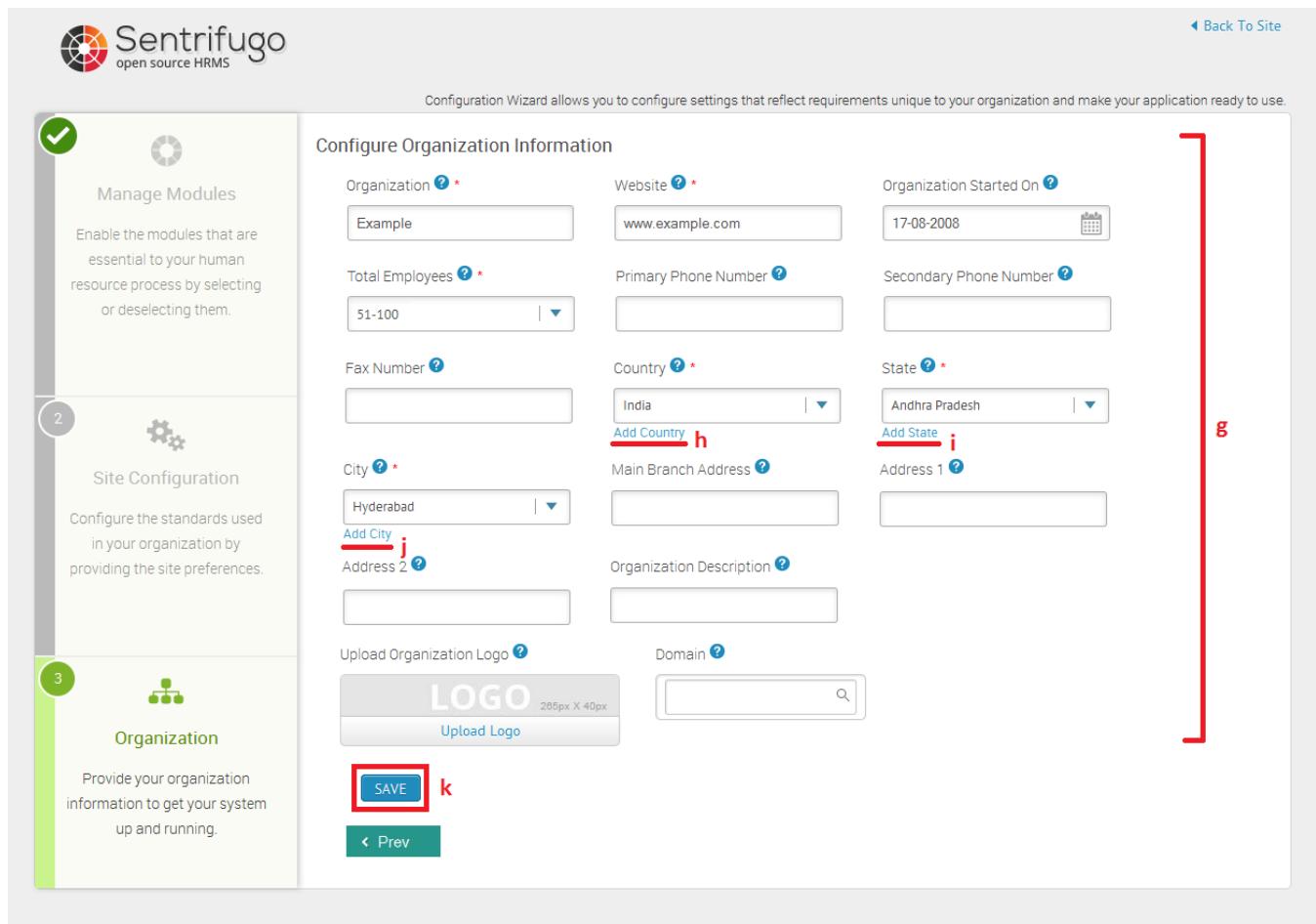
At the bottom, there is a 'SAVE' button (boxed with red 'f') and navigation buttons 'Prev' and 'Next'.

Refer Figure 2

In the Organization section, provide organization information

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

For further understanding, refer Figure 3



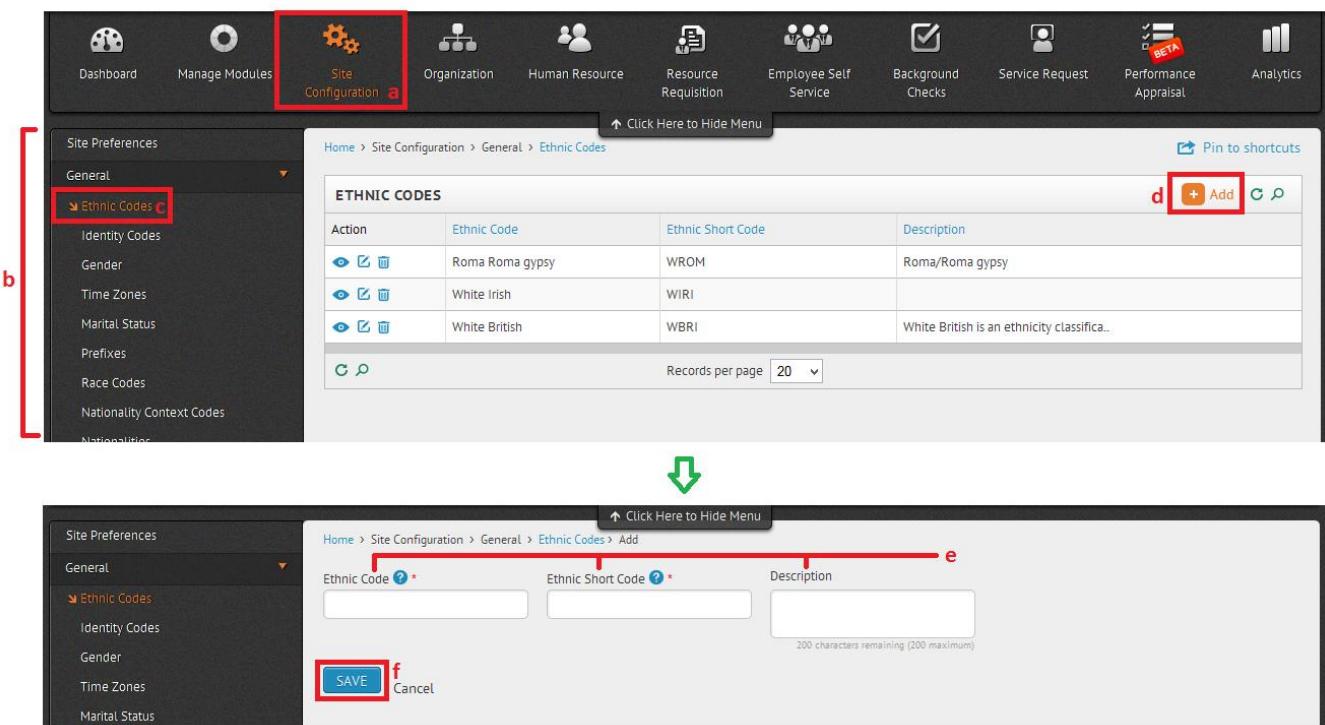
The screenshot shows the Sentrifugo Configuration Wizard at the 'Configure Organization Information' step. The interface is divided into three main sections: 'Manage Modules', 'Site Configuration', and 'Organization'. The 'Organization' section is currently active, displaying fields for organization details like name, website, start date, employees, phone numbers, and address. Red annotations highlight specific buttons: a bracket labeled 'g' covers the 'Add Country', 'Add State', and 'Add City' buttons; a box labeled 'k' covers the 'SAVE' button.

Figure 3

## How to Set Site Configurations within the Application:

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

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



**Top Screenshot: Ethnic Codes List Page**

The page title is "ETHNIC CODES". It displays a table with three rows:

Action	Ethnic Code	Ethnic Short Code	Description
	Roma Roma gypsy	WROM	Roma/Roma gypsy
	White Irish	WIRI	
	White British	WBRI	White British is an ethnicity classifica..

Buttons at the top right: + Add, Pin to shortcuts.

**Bottom Screenshot: Add Ethnic Code Form**

The page title is "Add". The form has three fields:

- Ethnic Code (required)
- Ethnic Short Code (required)
- Description (with a note: 200 characters remaining [200 maximum])

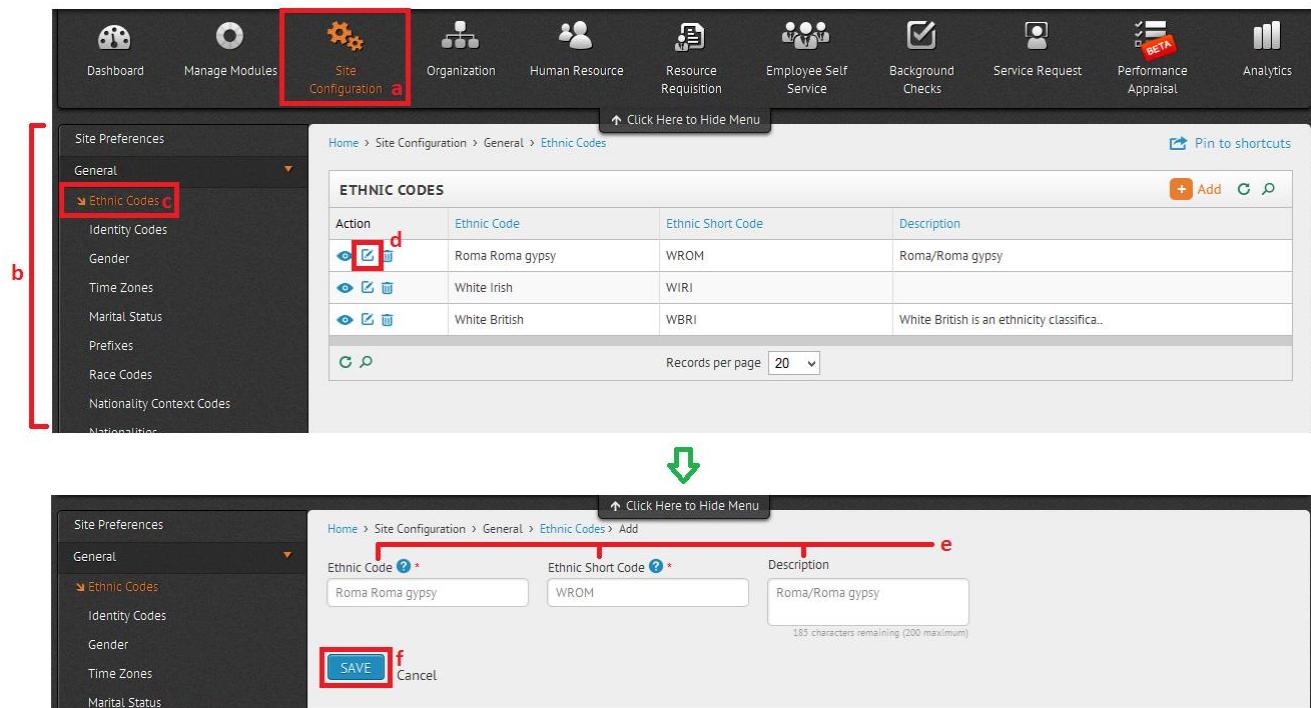
Buttons at the bottom: SAVE (highlighted with a red box), Cancel.

Figure 4

## How to Edit Site Configurations within the Application:

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

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



The figure consists of two screenshots of the Sentrifugo application interface, connected by a green downward arrow.

**Screenshot 1 (Top):** Shows the main navigation bar with various icons and links like Dashboard, Manage Modules, Site Configuration (highlighted with a red box), Organization, Human Resource, etc. A red bracket labeled 'b' points to the 'Site Preferences' sidebar on the left, which lists General, Ethnic Codes (highlighted with a red box), Identity Codes, Gender, Time Zones, Marital Status, Prefixes, Race Codes, Nationality Context Codes, and Nationalities. A red bracket labeled 'd' points to the edit icon (pencil) next to the 'Roma Roma gypsy' row in the 'ETHNIC CODES' table. The table has columns: Action, Ethnic Code, Ethnic Short Code, and Description. The first row is highlighted.

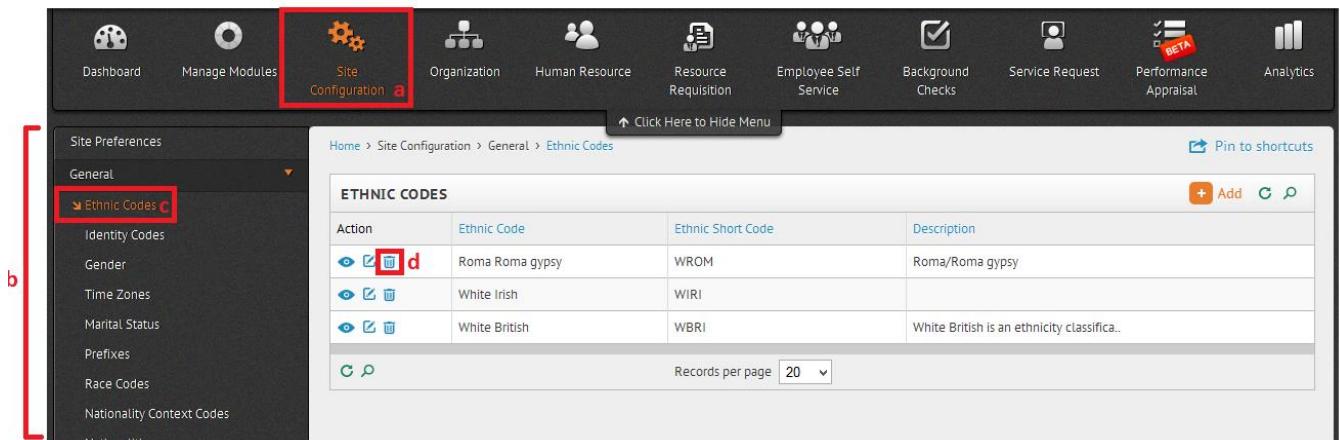
**Screenshot 2 (Bottom):** Shows a detailed view of the 'Ethnic Codes' edit screen. It has fields for Ethnic Code (Roma Roma gypsy), Ethnic Short Code (WROM), and Description (Roma/Roma gypsy). A red bracket labeled 'e' points to the 'Description' field. A red bracket labeled 'f' points to the 'SAVE' button at the bottom. The sidebar on the left is identical to the one in Screenshot 1.

Figure 5

## Need to Delete Site Configurations within the Application:

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

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



Action	Ethnic Code	Ethnic Short Code	Description
	Roma Roma gypsy	WROM	Roma/Roma gypsy
	White Irish	WIRI	
	White British	WBRI	White British is an ethnicity classifica..

Figure 6

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

Refer Figure 7

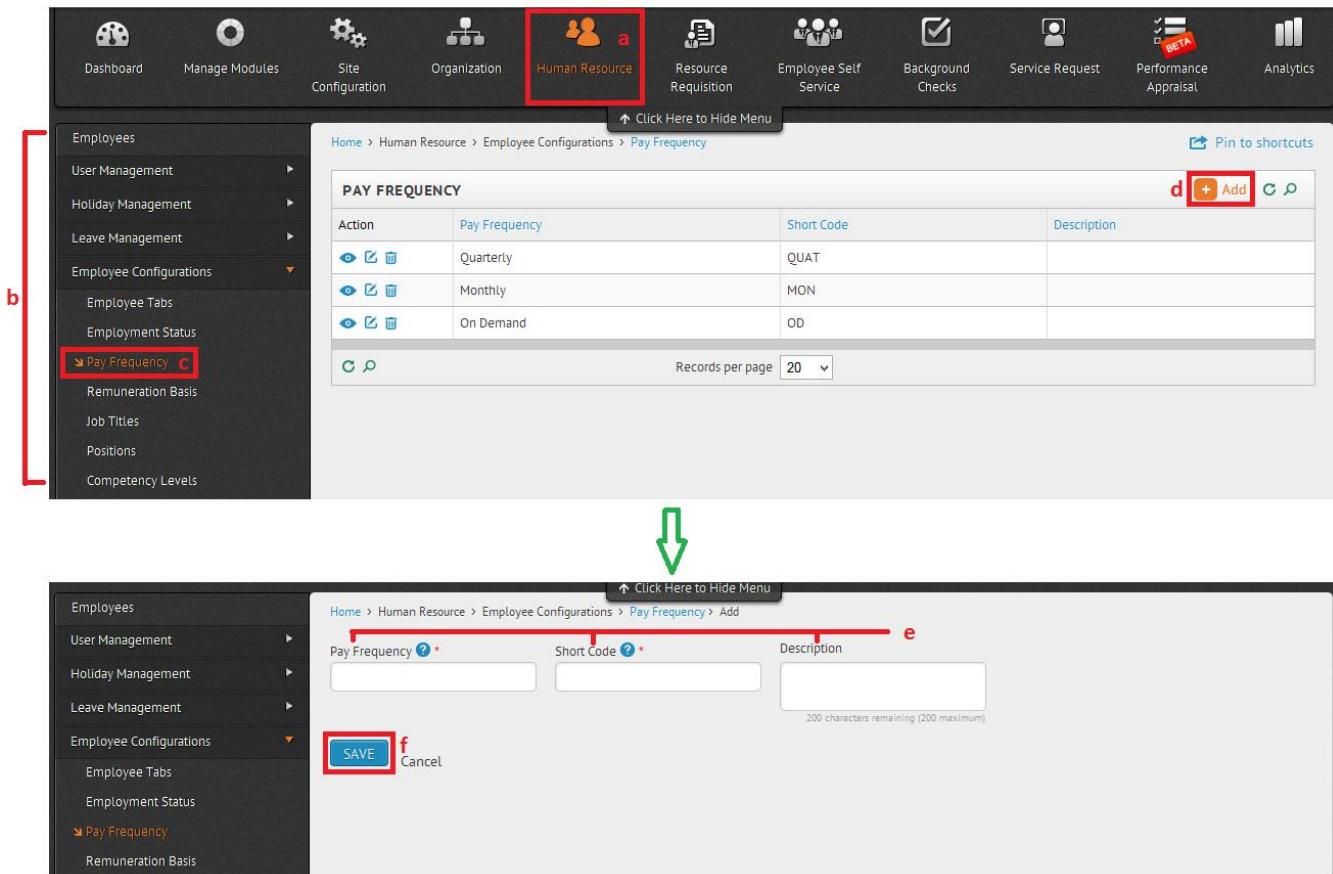


Figure 7

## To Set Employee Configurations:

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

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



**Top Screenshot (Main Page):**

- a. Human Resource icon in the top menu bar.
- b. Left sidebar menu under Employee Configurations: Employees, User Management, Holiday Management, Leave Management, Employee Configurations (selected), Employee Tabs, Employment Status, Pay Frequency (highlighted), Remuneration Basis, Job Titles, Positions, Competency Levels.
- c. 'Click Here to Hide Menu' button.
- d. 'Add' button in the top right corner of the Pay Frequency table.
- e. Pay Frequency table data:

Action	Pay Frequency	Short Code	Description
	Quarterly	QUAT	
	Monthly	MON	
	On Demand	OD	

- f. 'Records per page' dropdown set to 20.

**Bottom Screenshot (Add Form):**

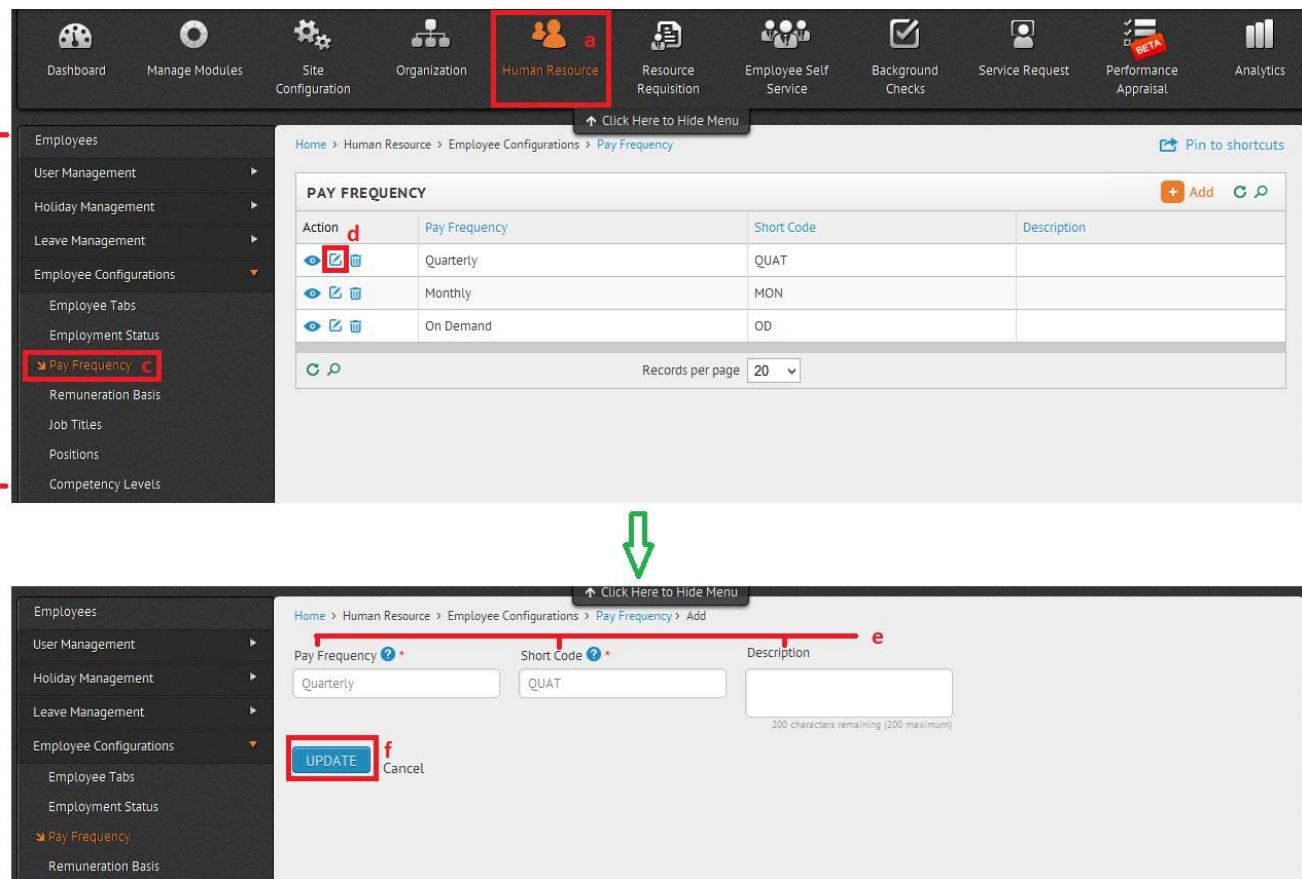
- e. Fields for Pay Frequency, Short Code, and Description.
- f. 'SAVE' button highlighted.

Figure 8

## To Edit an Employee Configuration:

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

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



The figure consists of two vertically stacked screenshots of the Sentrifugo HRMS interface.

**Screenshot 1 (Top):** This shows the main dashboard with various icons and a navigation bar. The "Human Resource" icon is highlighted with a red box and labeled 'a'. A red bracket on the left side panel, labeled 'b', groups several items under "Employee Configurations": "Pay Frequency", "Remuneration Basis", "Job Titles", "Positions", and "Competency Levels". The "Pay Frequency" item is also highlighted with a red box and labeled 'c'. The main content area displays a table titled "PAY FREQUENCY" with three rows: "Quarterly" (Short Code: QUAT), "Monthly" (Short Code: MON), and "On Demand" (Short Code: OD). A green arrow points from the "Pay Frequency" item in the sidebar down to the table in the main content area.

Action	Pay Frequency	Short Code	Description
	Quarterly	QUAT	
	Monthly	MON	
	On Demand	OD	

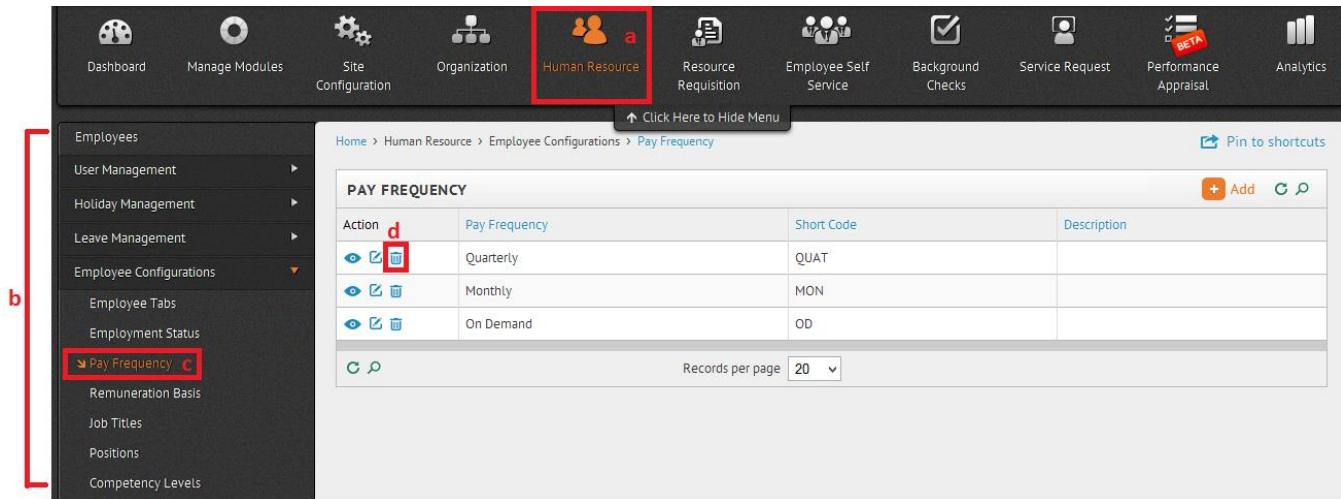
**Screenshot 2 (Bottom):** This shows the "Pay Frequency" configuration page. The "Pay Frequency" field contains "Quarterly" and has a red box around it, labeled 'd'. The "Short Code" field contains "QUAT" and has a red box around it, labeled 'e'. At the bottom, there are "UPDATE" and "Cancel" buttons, with the "UPDATE" button highlighted by a red box and labeled 'f'.

Figure 9

## To Delete an Employee Configuration:

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

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



Action	Pay Frequency	Short Code	Description
	Quarterly	QUAT	
	Monthly	MON	
	On Demand	OD	

Figure 10

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

Refer Figure 11

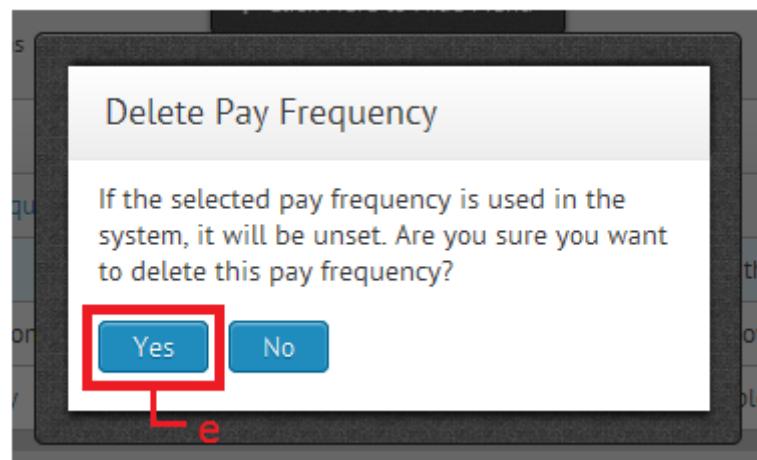
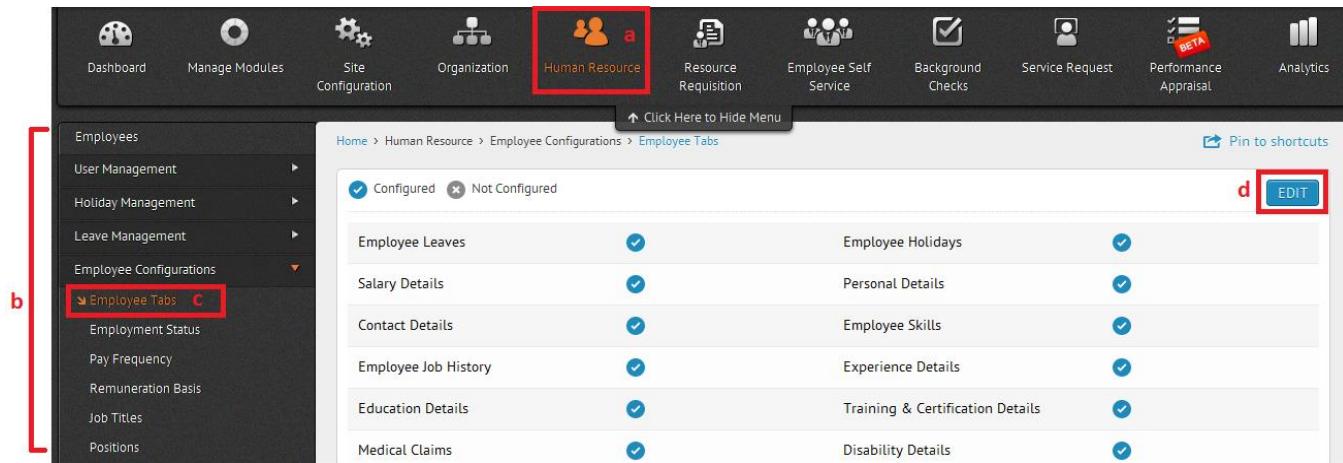


Figure 11

## Want to Configure Tabs for Employees:

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

Refer Figure 12

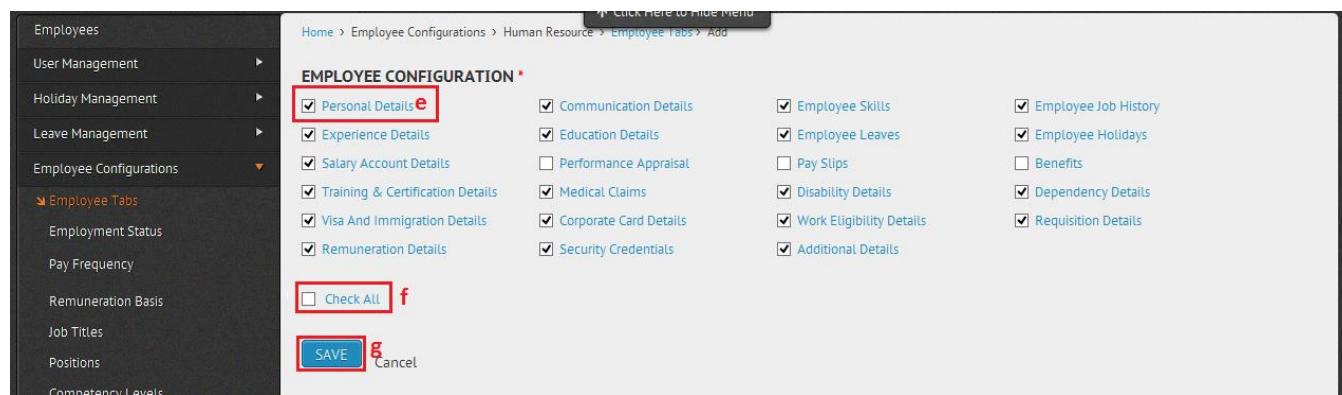


The screenshot shows the 'Employee Configuration' screen. On the left, a sidebar lists various management categories. Under 'Employee Management', 'Employee Configurations' is expanded, and 'Employee Tabs' is selected, indicated by a red box 'c'. At the top right, there is an 'EDIT' button highlighted with a red box 'd'. The main area displays a table of employee details, each with a checkbox. Most checkboxes are checked, except for 'Personal Details' which is unselected. The table includes columns for Employee Leaves, Salary Details, Contact Details, Employee Job History, Education Details, Medical Claims, Employee Holidays, Personal Details, Employee Skills, Experience Details, Training & Certification Details, Disability Details, and other related tabs.

Figure 12

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

Refer Figure 13



The screenshot shows the 'EMPLOYEE CONFIGURATION' form. On the left, a sidebar lists management categories. Under 'Employee Management', 'Employee Configurations' is expanded, and 'Employee Tabs' is selected, indicated by a red box 'e'. Below the sidebar, there is a 'Check All' checkbox highlighted with a red box 'f'. At the bottom left, there is a 'SAVE' button highlighted with a red box 'g'. The main area contains a grid of checkboxes for various employee details, grouped into four columns. Some checkboxes are checked (e.g., 'Personal Details', 'Check All', 'Employee Skills', 'Employee Holidays', 'Communication Details', 'Education Details', 'Performance Appraisal', 'Pay Slips', 'Benefits', 'Medical Claims', 'Corporate Card Details', 'Work Eligibility Details', 'Requisition Details', 'Dependency Details', 'Additional Details', 'Visa And Immigration Details', 'Training & Certification Details', 'Remuneration Details', 'Security Credentials').

Figure 13

## Do You Want to Add an Organization:

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

Refer Figure 14

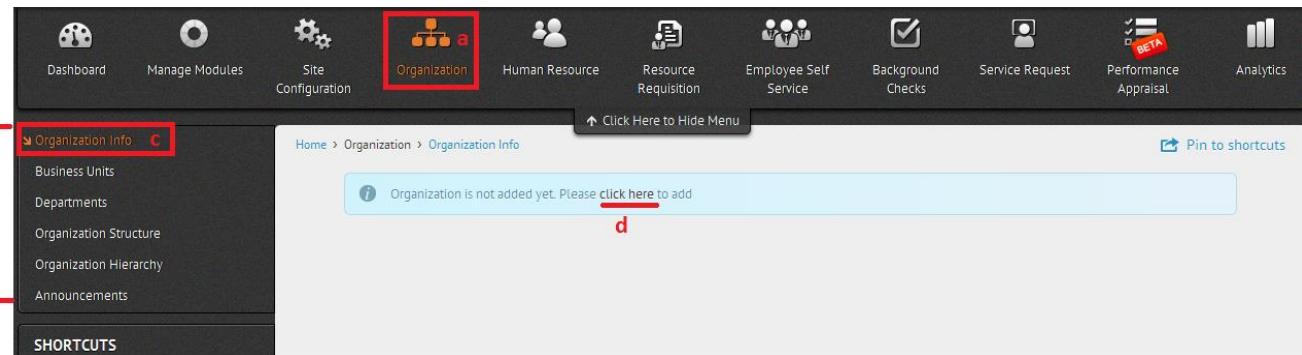
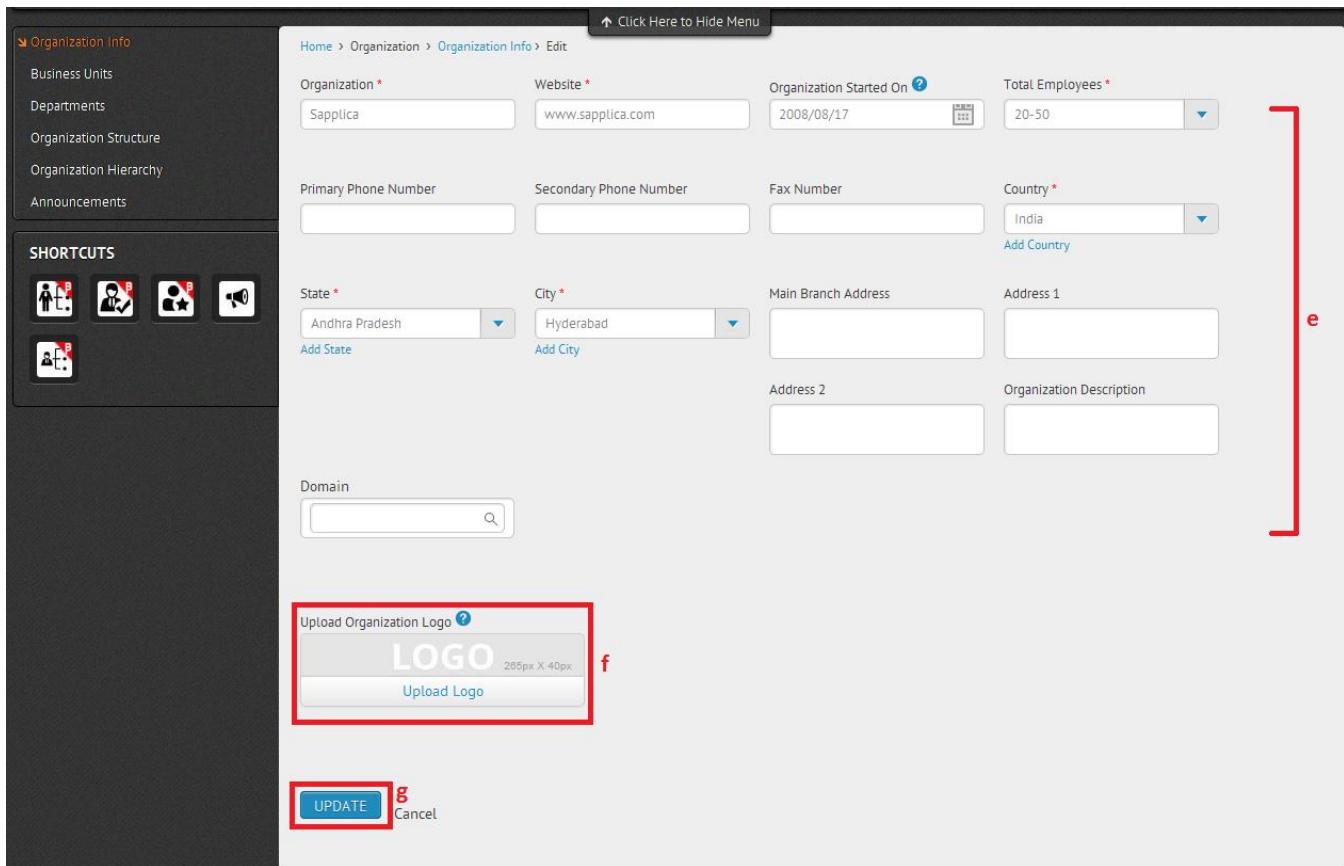


Figure 14

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

Refer Figure 15



The screenshot shows the 'Organization Info' page in the Sentrifugo application. The left sidebar has a dark theme with 'Organization Info' expanded, showing links for Business Units, Departments, Organization Structure, Organization Hierarchy, and Announcements. Below this is a 'SHORTCUTS' section with icons for users, roles, reports, and a megaphone.

The main content area has a light background. At the top, there's a breadcrumb navigation: Home > Organization > Organization Info > Edit. To the right of the breadcrumb is a link 'Click Here to Hide Menu'. The page contains several input fields:

- Organization \*: Sapplica
- Website \*: www.sapplica.com
- Organization Started On: 2008/08/17
- Total Employees \*: 20-50
- Primary Phone Number: (empty)
- Secondary Phone Number: (empty)
- Fax Number: (empty)
- Country \*: India
- Add Country: (button)
- State \*: Andhra Pradesh
- City \*: Hyderabad
- Main Branch Address: (empty)
- Address 1: (empty)
- Address 2: (empty)
- Organization Description: (empty)
- Domain: (empty)

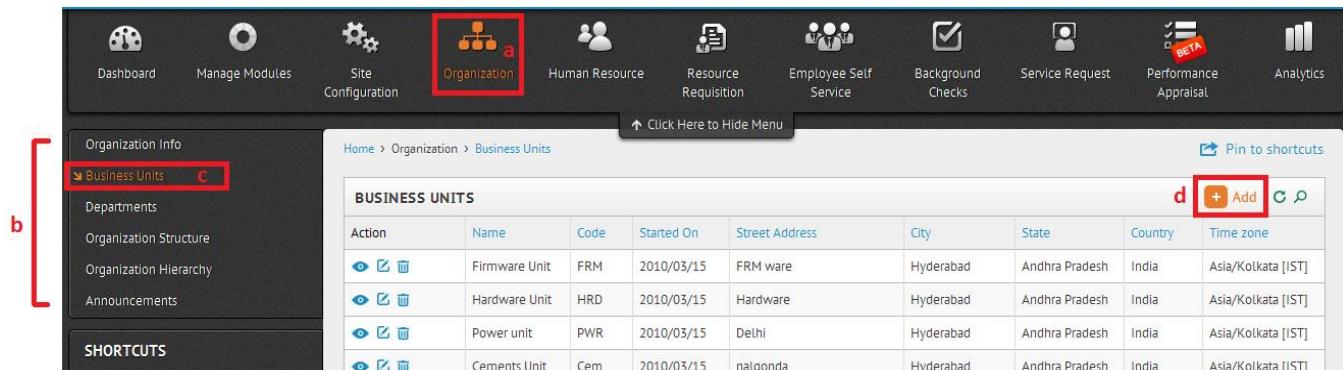
At the bottom, there's a section for 'Upload Organization Logo' with a placeholder 'LOGO 285px X 40px'. It includes a file input field 'Upload Logo' and a red button 'UPDATE' with a small 'g' label next to it. There's also a 'Cancel' link. A red bracket labeled 'e' covers the entire form area, and a red box labeled 'f' covers the logo upload section.

Figure 15

## How to Add Business Units:

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

Refer Figure 16

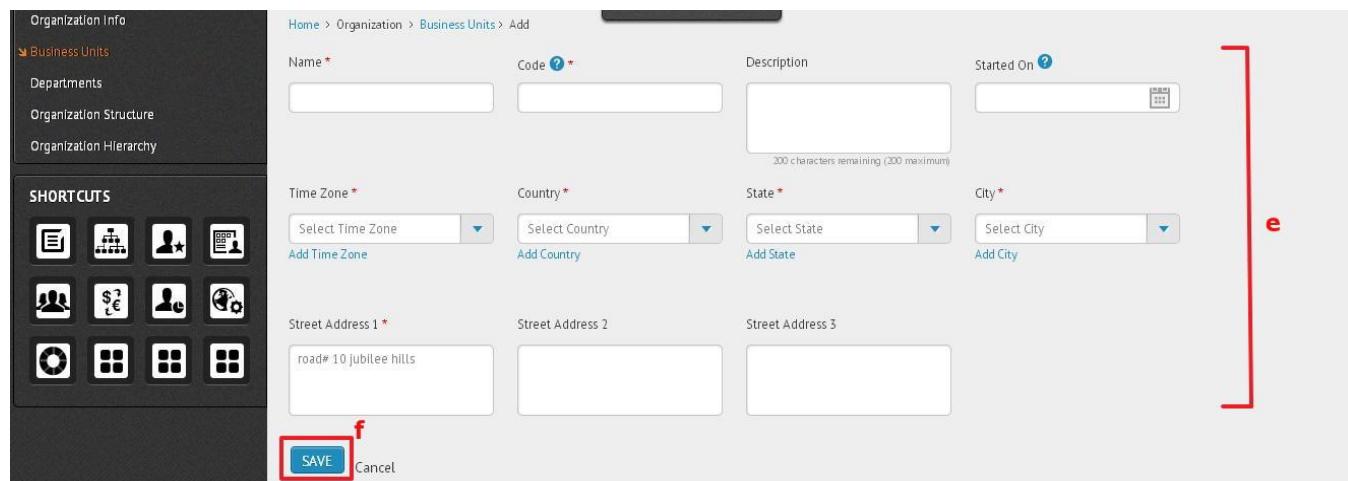


Action	Name	Code	Started On	Street Address	City	State	Country	Time zone
	Firmware Unit	FRM	2010/03/15	FRM ware	Hyderabad	Andhra Pradesh	India	Asia/Kolkata [IST]
	Hardware Unit	HRD	2010/03/15	Hardware	Hyderabad	Andhra Pradesh	India	Asia/Kolkata [IST]
	Power unit	PWR	2010/03/15	Delhi	Hyderabad	Andhra Pradesh	India	Asia/Kolkata [IST]
	Cements Unit	Cem	2010/03/15	nalgonda	Hyderabad	Andhra Pradesh	India	Asia/Kolkata [IST]

Figure 16

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

Refer Figure 17



Organization Info

Business Units

Departments

Organization Structure

Organization Hierarchy

SHORTCUTS

Home > Organization > Business Units > Add

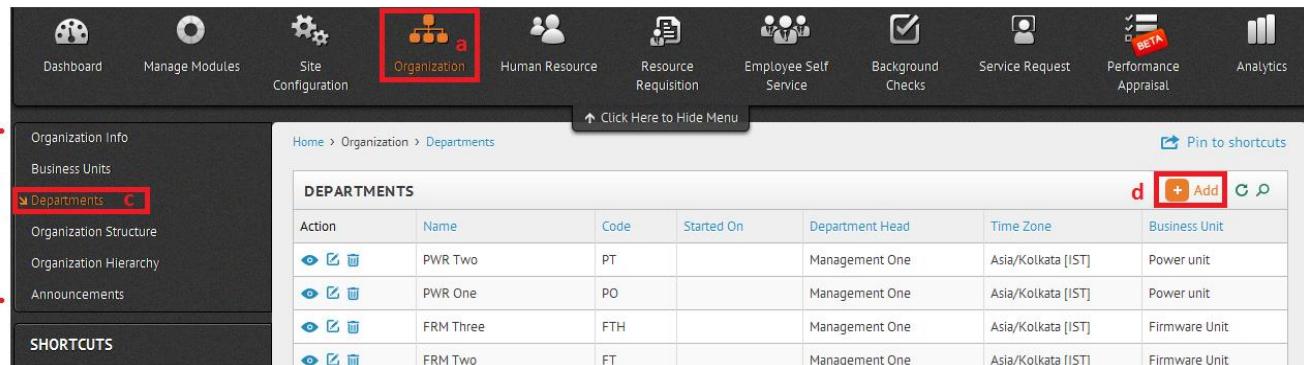
Name *	Code ? *	Description	Started On ?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
200 characters remaining (200 maximum)			
Time Zone *	Country *	State *	City *
Select Time Zone	Select Country	Select State	Select City
Add Time Zone	Add Country	Add State	Add City
Street Address 1 *	Street Address 2	Street Address 3	
<input type="text"/> road# 10 jubilee hills	<input type="text"/>	<input type="text"/>	
<b>SAVE</b>	<b>Cancel</b>		

Figure 17

## Steps to Add Departments:

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

Refer Figure 18

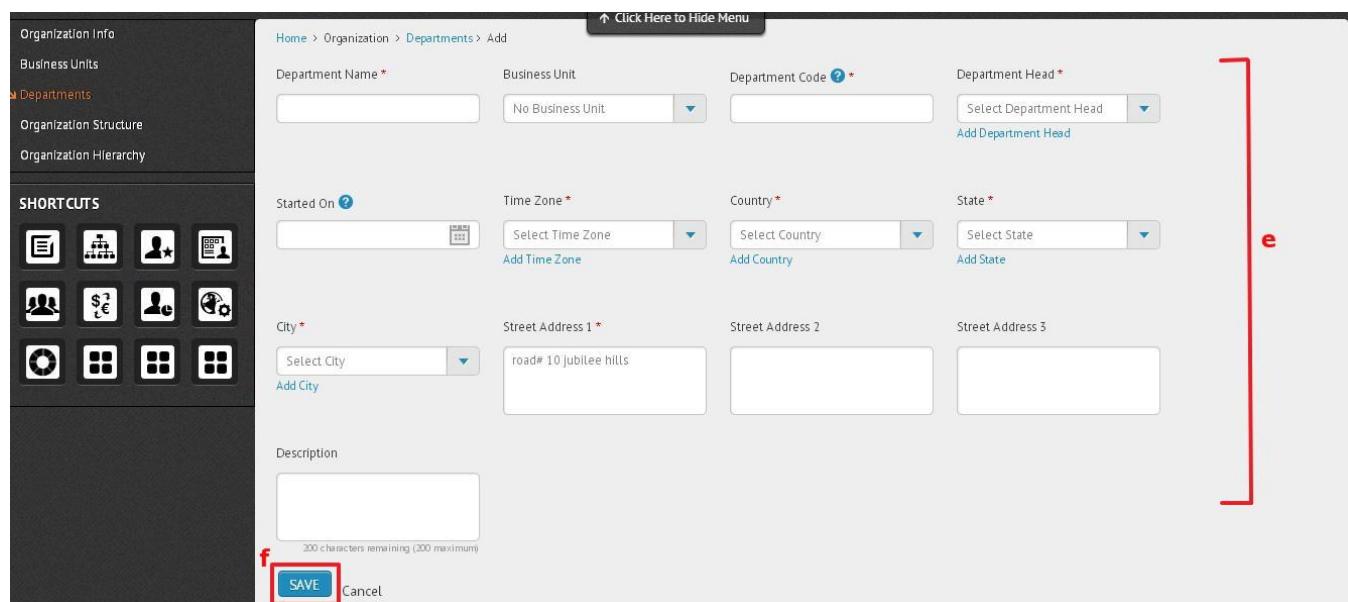


Action	Name	Code	Started On	Department Head	Time Zone	Business Unit
	PWR Two	PT		Management One	Asia/Kolkata [IST]	Power unit
	PWR One	PO		Management One	Asia/Kolkata [IST]	Power unit
	FRM Three	FTH		Management One	Asia/Kolkata [IST]	Firmware Unit
	FRM Two	FT		Management One	Asia/Kolkata [IST]	Firmware Unit

Figure 18

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

Refer Figure 19



Department Name \*:

Business Unit:  No Business Unit

Department Code ?: \*:

Department Head \*:  Select Department Head

Started On ?:  Add Time Zone

Time Zone \*:  Select Time Zone

Country \*:  Select Country

State \*:  Select State

City \*:  Select City

Street Address 1 \*:  road# 10 jubilee hills

Street Address 2:

Street Address 3:

Description:  
  
300 characters remaining (300 maximum)

**SAVE** Cancel

Figure 19

## How do I Set Site Preferences:

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

Refer Figure 20

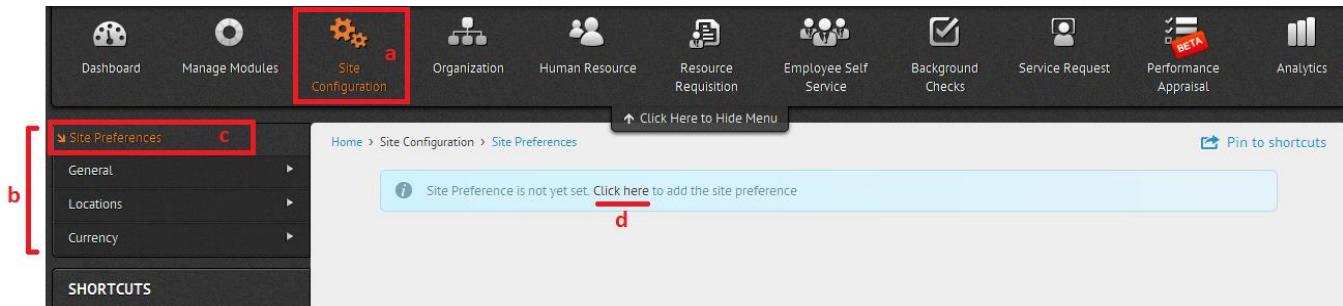


Figure 20

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

Refer Figure 21

Figure 21

## How to Activate and In-active Modules:

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

Refer Figure 22

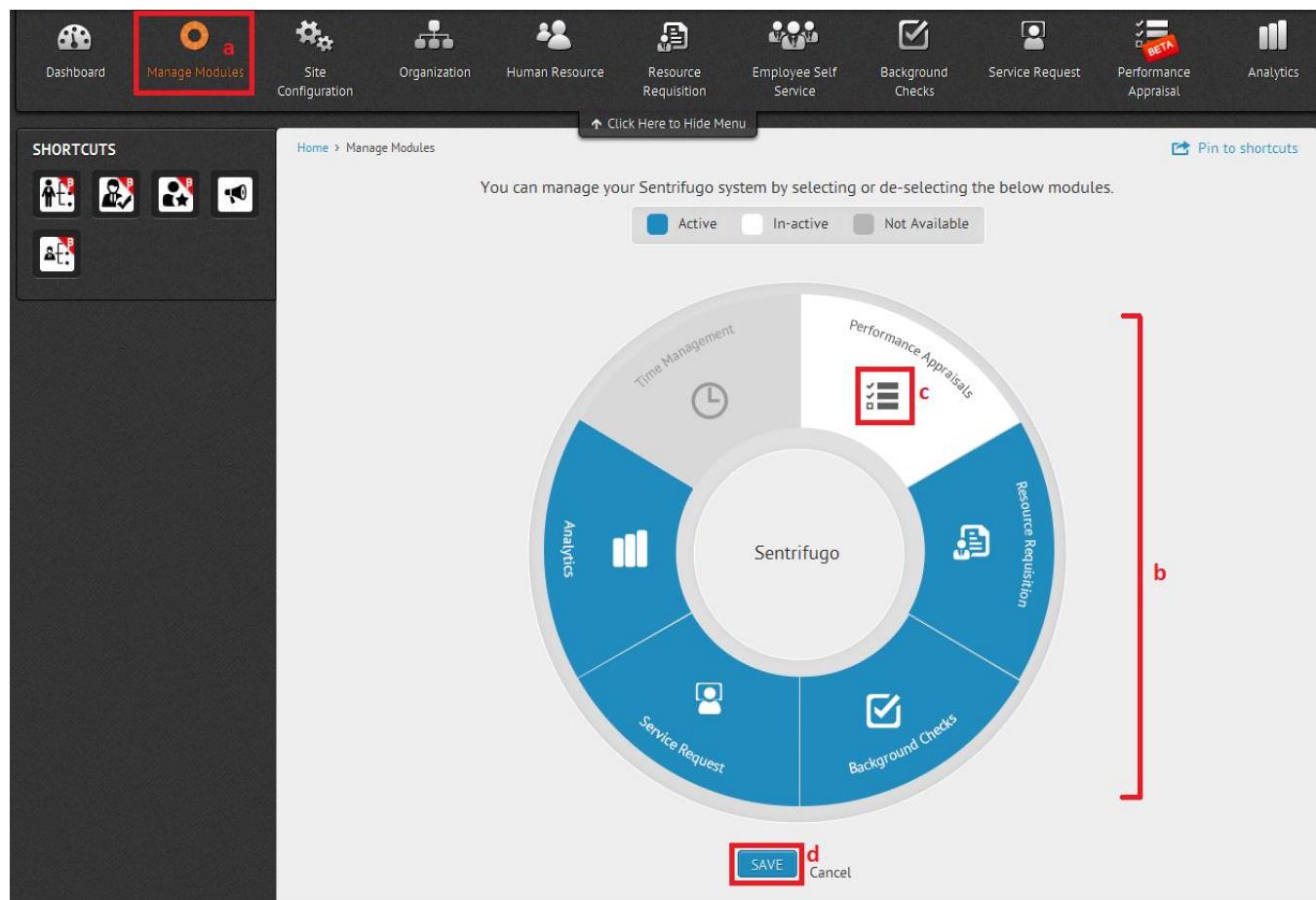
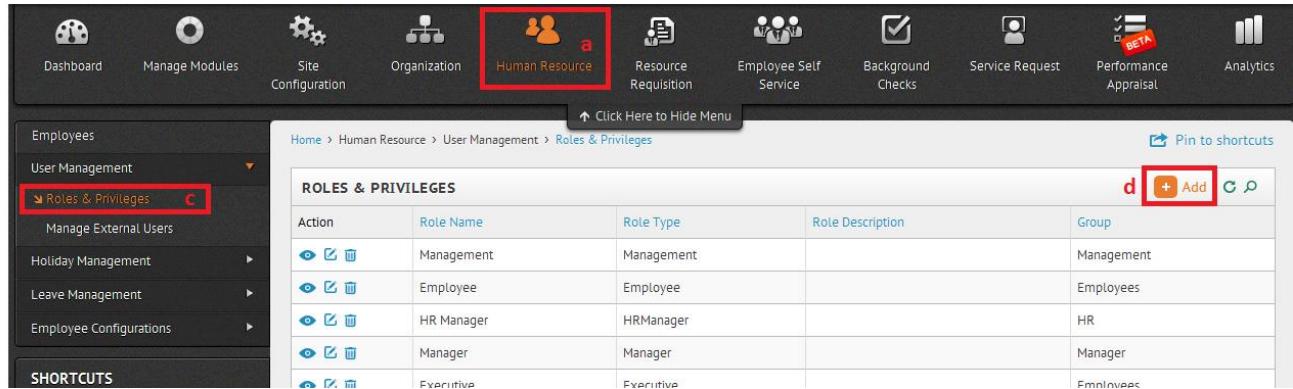


Figure 22

## Do you want to Add Roles & Privileges:

- Click on User Management in the top menu
- The left side panel will display the submenus
- Click on Roles & Privileges
- Click on Add button in the right side panel

Refer Figure 23



**ROLES & PRIVILEGES**

Action	Role Name	Role Type	Role Description	Group
	Management	Management		Management
	Employee	Employee		Employees
	HR Manager	HRManager		HR
	Manager	Manager		Manager
	Executive	Executive		Employees

Figure 23

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

Refer Figure 24

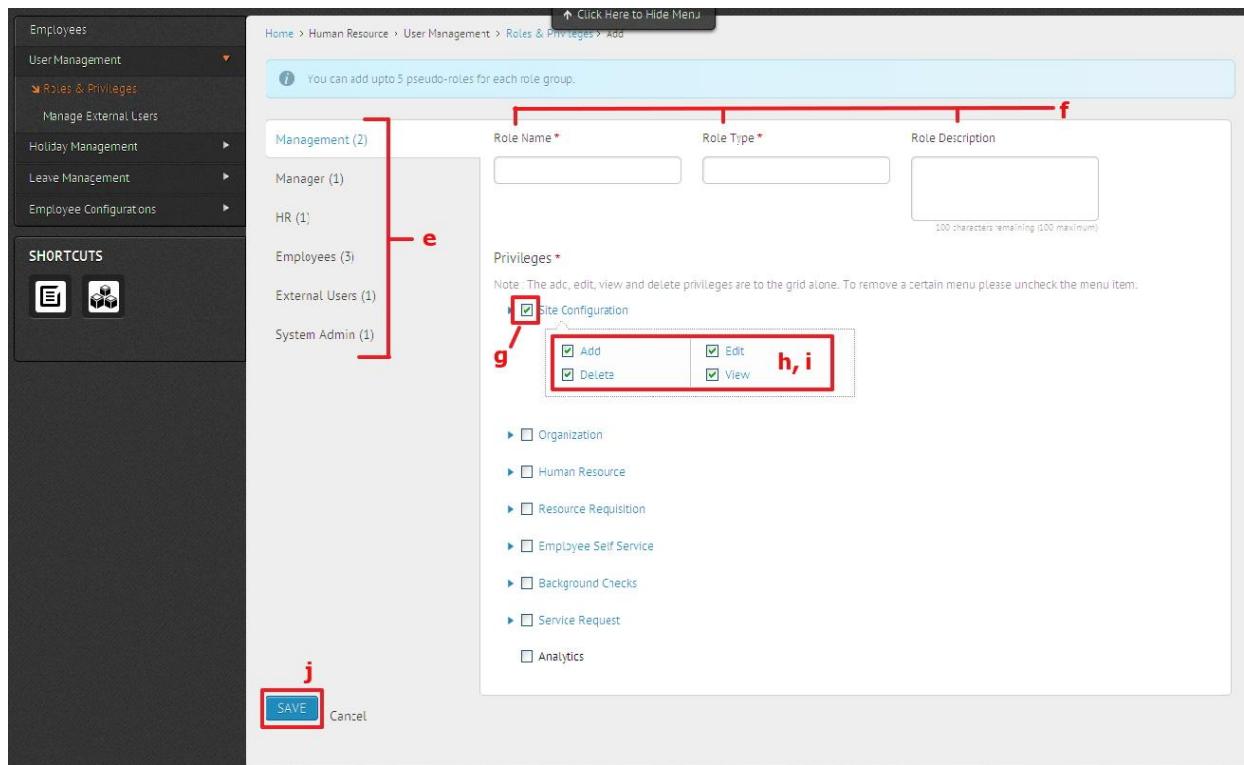


Figure 24

## How do I Add an External User:

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

Refer Figure 25

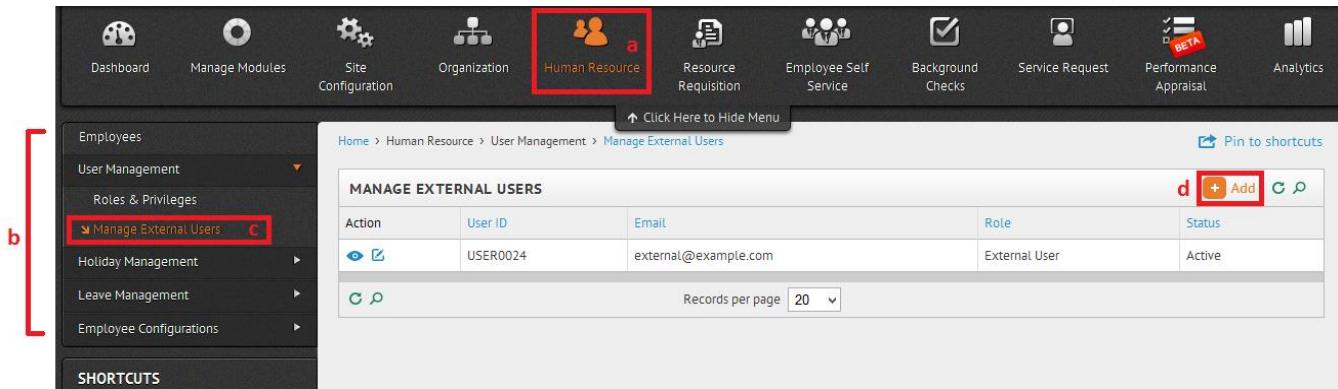


Figure 25

- Click on Configure Identity Codes to add the identity code for users
- Enter the Full Name
- Enter the Email
- Select a role in Assign a Role dropdown
- Provide comments if necessary
- Click on Save to add an external user

Refer Figure 26

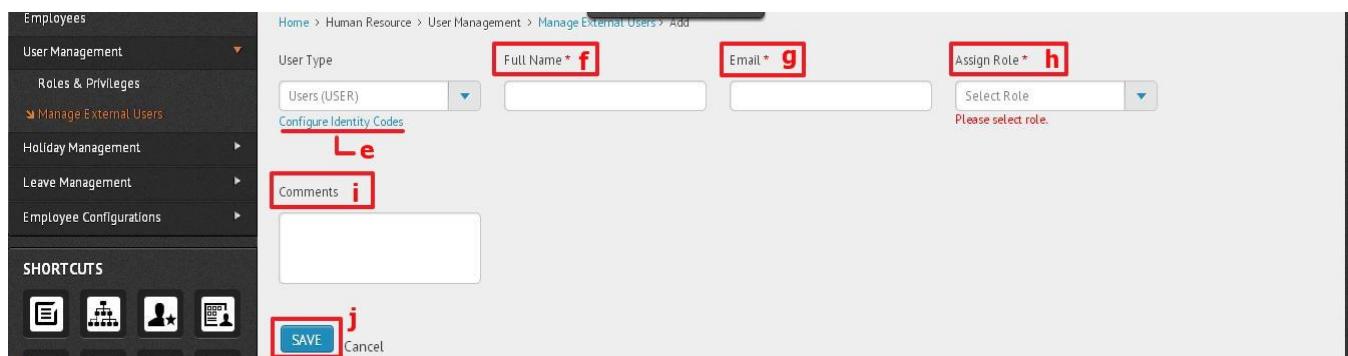


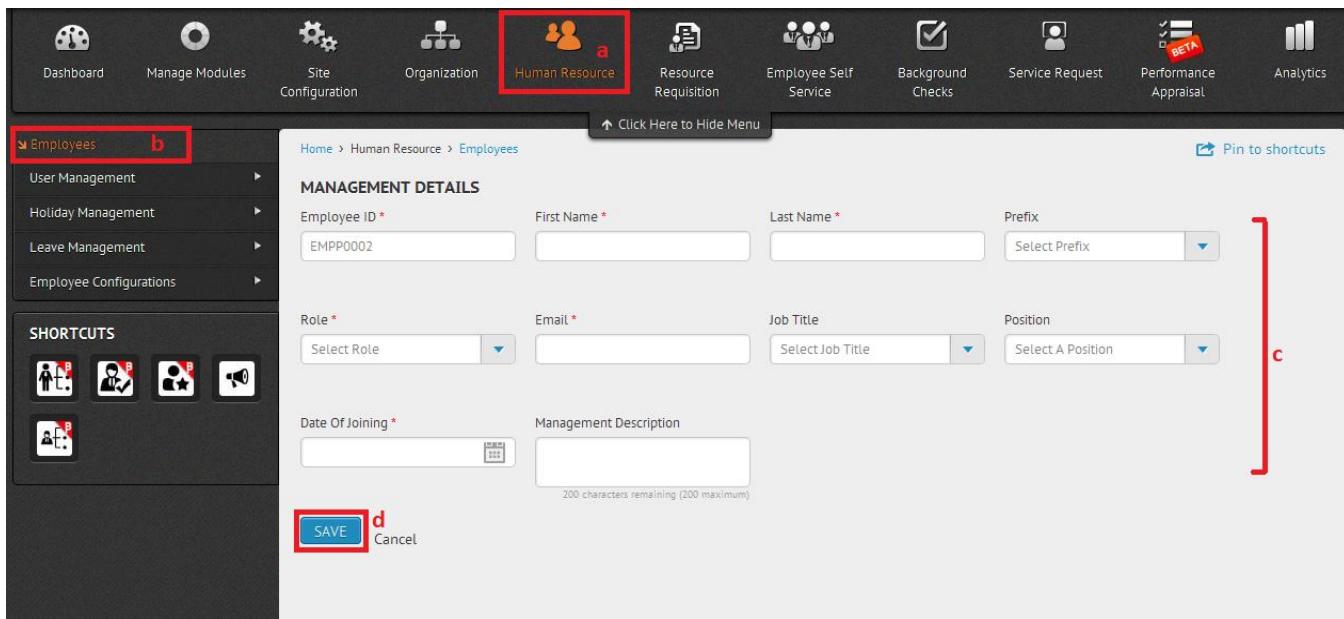
Figure 26

## How do I Add an Employee:

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

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

Refer Figure 27



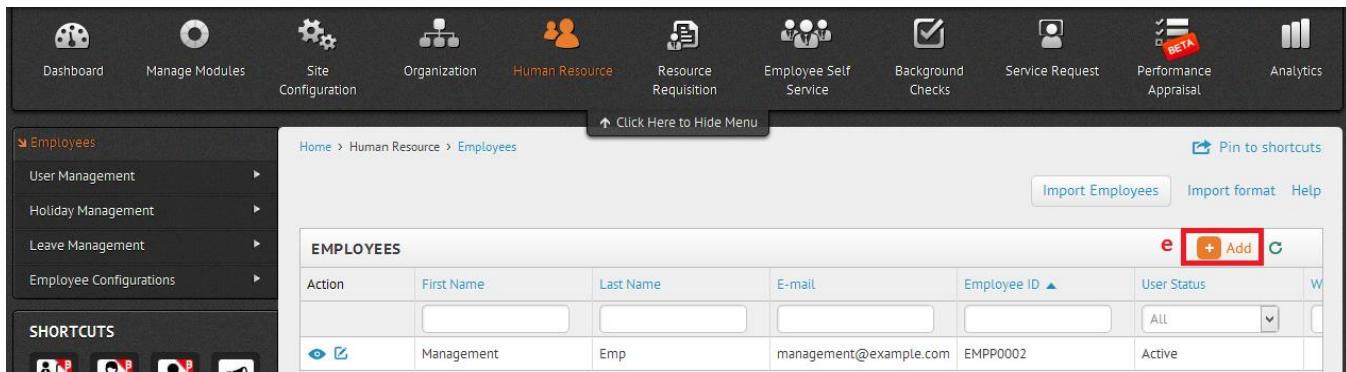
The screenshot shows the Sentrifugo HRMS interface. At the top, there's a navigation bar with various icons and links: Dashboard, Manage Modules, Site Configuration, Organization, Human Resource (which is highlighted with a red box 'a'), Resource Requisition, Employee Self Service, Background Checks, Service Request, Performance Appraisal (with a 'BETA' badge), and Analytics. Below the navigation bar is a left sidebar with a menu: 'Employees' (highlighted with a red box 'b'), User Management, Holiday Management, Leave Management, and Employee Configurations. To the right of the sidebar is the main content area. The main content area has a header 'Click Here to Hide Menu' and a 'Pin to shortcuts' link. It displays a 'MANAGEMENT DETAILS' form with the following fields: Employee ID \* (containing 'EMPP0002'), First Name \* (empty), Last Name \* (empty), Prefix (dropdown 'Select Prefix'), Role \* (dropdown 'Select Role'), Email \* (empty), Job Title (dropdown 'Select Job Title'), Position (dropdown 'Select A Position'), Date Of Joining \* (calendar icon), Management Description (text area with placeholder '200 characters remaining (200 maximum)'), and a note '200 characters remaining (200 maximum)'. At the bottom of the form are two buttons: 'SAVE' (highlighted with a red box 'd') and 'Cancel'.

Refer Figure 27

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

- e. Click on Add button in the right side panel

Refer Figure 28



EMPLOYEES

Action	First Name	Last Name	E-mail	Employee ID	User Status
	Management	Emp	management@example.com	EMPP0002	Active

Figure 28

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

Refer Figure 29

<div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9;"> <b>Official</b> </div> <a href="#">Leaves</a> <a href="#">Holidays</a> <a href="#">Salary</a> <a href="#">Personal</a> <a href="#">Contact</a> <a href="#">Skills</a> <a href="#">Job History</a> <a href="#">Experience</a> <a href="#">Education</a> <a href="#">Training &amp; Certification</a> <a href="#">Medical Claims</a> <a href="#">Disability</a> <a href="#">Dependency</a> <a href="#">Visa and Immigration</a> <a href="#">Corporate Card</a> <a href="#">Work Eligibility</a>	<table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; border: 2px solid red; padding: 5px;"> <b>Employee ID</b>  <input type="text" value="EMPP0013"/>  <a href="#">Configure Identity Codes</a> </td> <td style="width: 20%; border: 1px solid #ccc; padding: 5px;">         Prefix  <input type="button" value="Select Prefix"/> <input type="button" value="Add Prefix"/> </td> <td style="width: 50%; border: 1px solid #ccc; padding: 5px;">         First Name *  <input type="text"/> </td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 5px;">         Last Name *  <input type="text"/> </td> <td style="border: 1px solid #ccc; padding: 5px;">         Mode of Employment *  <input type="button" value="Direct"/> <input type="button" value="Select Mode"/> </td> <td style="border: 1px solid #ccc; padding: 5px;">         Role *  <input type="button" value="Select Role"/> <input type="button" value="Add Role"/> </td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 5px;">         Email *  <input type="text"/> </td> <td style="border: 1px solid #ccc; padding: 5px;">         Business Unit  <input type="button" value="No Business Unit"/> <input type="button" value="Select Business Unit"/> </td> <td style="border: 1px solid #ccc; padding: 5px;">         Department ? *  <input type="button" value="Select Department"/> <input type="button" value="Add Department"/> </td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 5px;">         Reporting Manager *  <input type="button" value="Select Reporting Manager"/> <input type="button" value="Add Reporting Manager"/> </td> <td style="border: 1px solid #ccc; padding: 5px;">         Job Title  <input type="button" value="Select Job Title"/> <input type="button" value="Add Job Title"/> </td> <td style="border: 1px solid #ccc; padding: 5px;">         Position ?  <input type="button" value="Select Position"/> <input type="button" value="Add Position"/> </td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 5px;">         Employment Status *  <input type="button" value="Select Employment Status"/> <input type="button" value="Add Employment Status"/> </td> <td style="border: 1px solid #ccc; padding: 5px;">         Date of joining ? *  <input type="text"/> </td> <td style="border: 1px solid #ccc; padding: 5px;">         Date of leaving ?  <input type="text"/> </td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 5px;">         Years of Experience  <input type="text"/> </td> <td style="border: 1px solid #ccc; padding: 5px;">         Work Telephone Number  <input type="text"/> </td> <td style="border: 1px solid #ccc; padding: 5px;">         Extension  <input type="text"/> </td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 5px;">         Fax  <input type="text"/> </td> <td colspan="2"></td> </tr> <tr> <td style="border: 2px solid red; padding: 5px; text-align: center;"> <input type="button" value="SAVE"/> <b>h</b> <input type="button" value="Cancel"/> </td> <td colspan="2"></td> </tr> </table>	<b>Employee ID</b> <input type="text" value="EMPP0013"/> <a href="#">Configure Identity Codes</a>	Prefix <input type="button" value="Select Prefix"/> <input type="button" value="Add Prefix"/>	First Name * <input type="text"/>	Last Name * <input type="text"/>	Mode of Employment * <input type="button" value="Direct"/> <input type="button" value="Select Mode"/>	Role * <input type="button" value="Select Role"/> <input type="button" value="Add Role"/>	Email * <input type="text"/>	Business Unit <input type="button" value="No Business Unit"/> <input type="button" value="Select Business Unit"/>	Department ? * <input type="button" value="Select Department"/> <input type="button" value="Add Department"/>	Reporting Manager * <input type="button" value="Select Reporting Manager"/> <input type="button" value="Add Reporting Manager"/>	Job Title <input type="button" value="Select Job Title"/> <input type="button" value="Add Job Title"/>	Position ? <input type="button" value="Select Position"/> <input type="button" value="Add Position"/>	Employment Status * <input type="button" value="Select Employment Status"/> <input type="button" value="Add Employment Status"/>	Date of joining ? * <input type="text"/>	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"/>			<input type="button" value="SAVE"/> <b>h</b> <input type="button" value="Cancel"/>		
<b>Employee ID</b> <input type="text" value="EMPP0013"/> <a href="#">Configure Identity Codes</a>	Prefix <input type="button" value="Select Prefix"/> <input type="button" value="Add Prefix"/>	First Name * <input type="text"/>																							
Last Name * <input type="text"/>	Mode of Employment * <input type="button" value="Direct"/> <input type="button" value="Select Mode"/>	Role * <input type="button" value="Select Role"/> <input type="button" value="Add Role"/>																							
Email * <input type="text"/>	Business Unit <input type="button" value="No Business Unit"/> <input type="button" value="Select Business Unit"/>	Department ? * <input type="button" value="Select Department"/> <input type="button" value="Add Department"/>																							
Reporting Manager * <input type="button" value="Select Reporting Manager"/> <input type="button" value="Add Reporting Manager"/>	Job Title <input type="button" value="Select Job Title"/> <input type="button" value="Add Job Title"/>	Position ? <input type="button" value="Select Position"/> <input type="button" value="Add Position"/>																							
Employment Status * <input type="button" value="Select Employment Status"/> <input type="button" value="Add Employment Status"/>	Date of joining ? * <input type="text"/>	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"/>																									
<input type="button" value="SAVE"/> <b>h</b> <input type="button" value="Cancel"/>																									

Figure 29

## How can I Update My Details:

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

Refer Figure 30

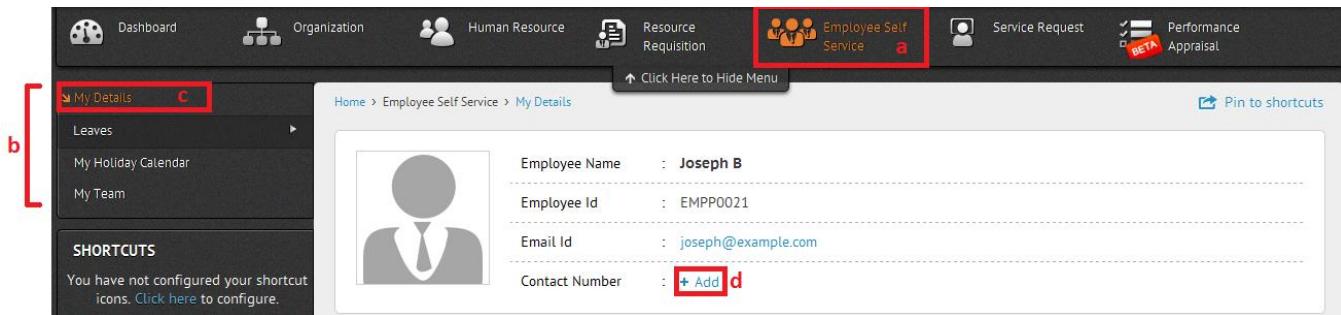


Figure 30

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

Refer Figure 31

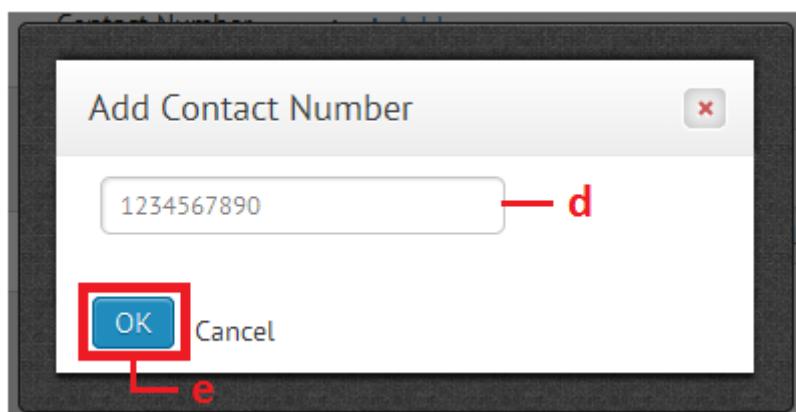
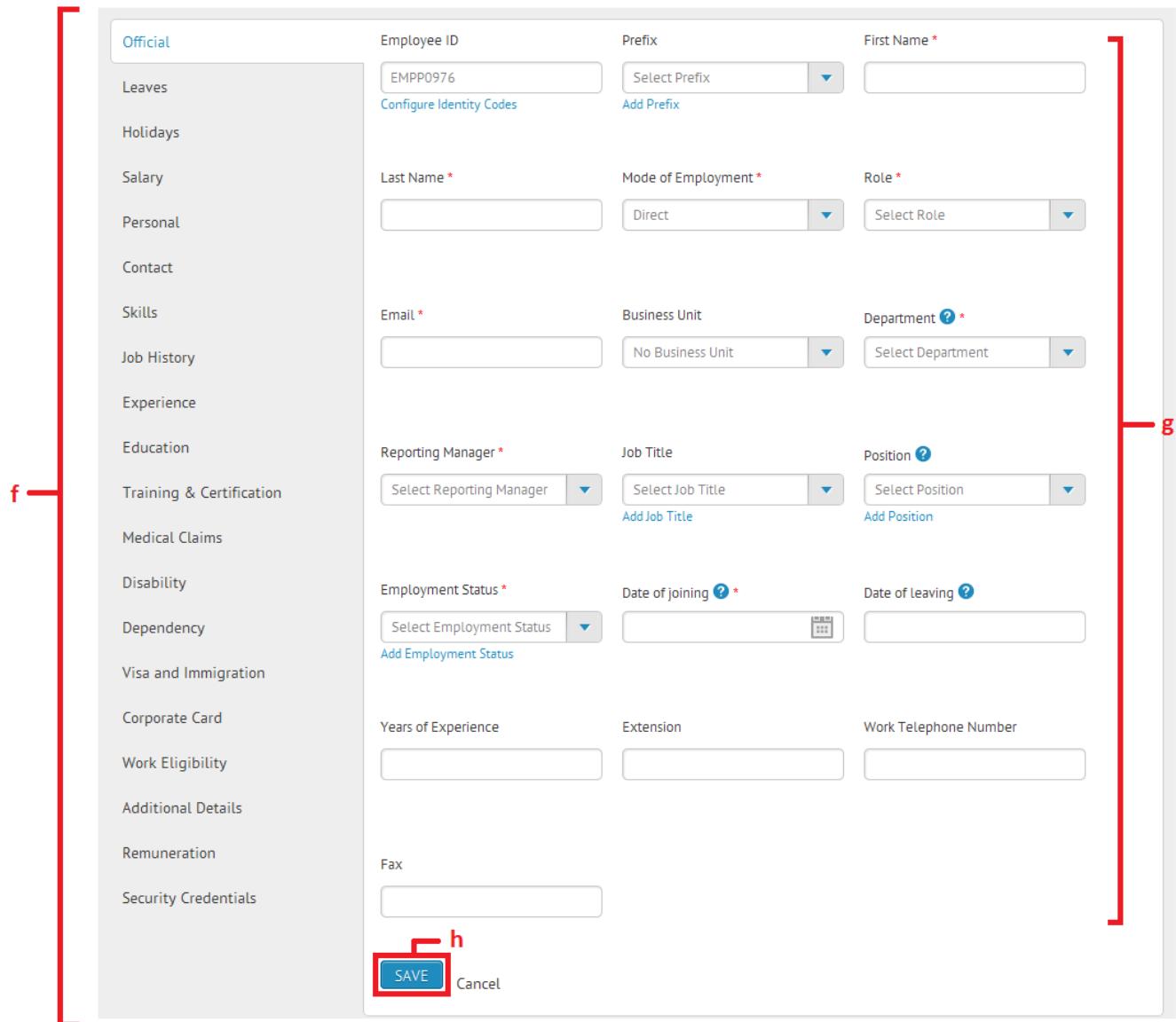


Figure 31

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

Refer Figure 32



The screenshot shows the 'Official' tab selected in the left sidebar of the Sentrifugo Employee Details interface. The main form contains the following fields:

- Employee ID:** EMPP0976
- Prefix:** Select Prefix (dropdown)
- First Name:** (empty input field)
- Leaves:** Configure Identity Codes (button)
- Holidays:**
- Salary:** Last Name \* (input), Mode of Employment \* (dropdown), Role \* (dropdown)
- Personal:**
- Contact:**
- Skills:** Email \* (input), Business Unit (dropdown), Department ? \* (dropdown)
- Job History:** No Business Unit (dropdown), Select Department (dropdown)
- Experience:**
- Education:** Reporting Manager \* (dropdown), Job Title (dropdown), Position ? (dropdown)
- Training & Certification:** Select Reporting Manager (dropdown), Select Job Title (dropdown), Add Job Title (button), Select Position (dropdown), Add Position (button)
- Medical Claims:**
- Disability:** Employment Status \* (dropdown), Date of joining ? \* (calendar icon), Date of leaving ? (input)
- Dependency:** Select Employment Status (dropdown), Add Employment Status (button)
- Visa and Immigration:**
- Corporate Card:** Years of Experience (input), Extension (input), Work Telephone Number (input)
- Work Eligibility:**
- Additional Details:**
- Remuneration:** Fax (input)
- Security Credentials:**

At the bottom, there are two buttons: **SAVE** (highlighted with a red box) and **Cancel**.

Figure 32

## How to Add Employee Documents:

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

For employees to add documents:

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

Refer Figure 33

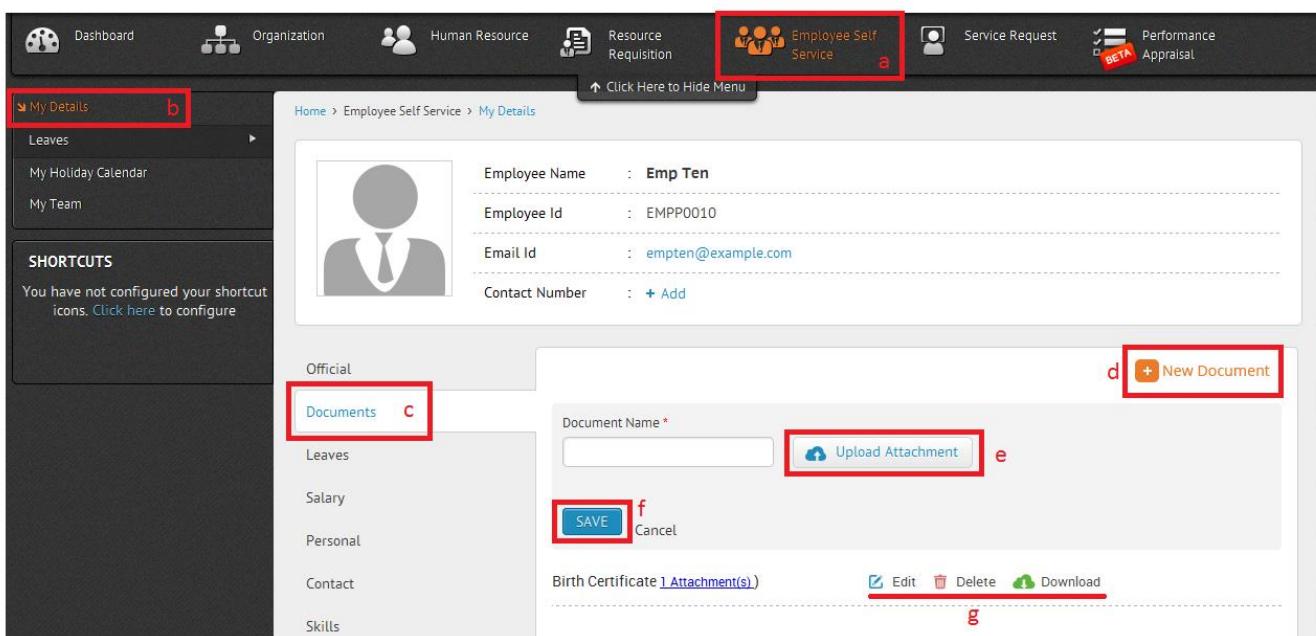
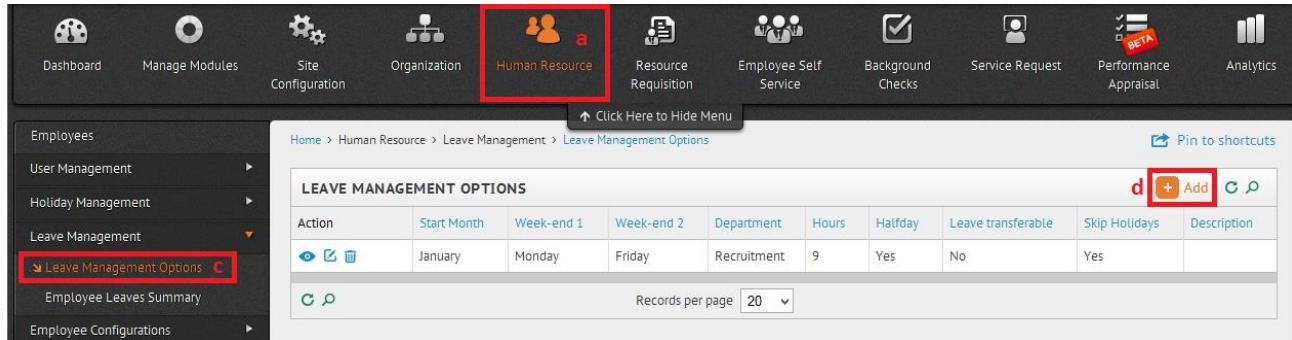


Figure 33

## Want to Add Leave Management Options:

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

Refer Figure 34

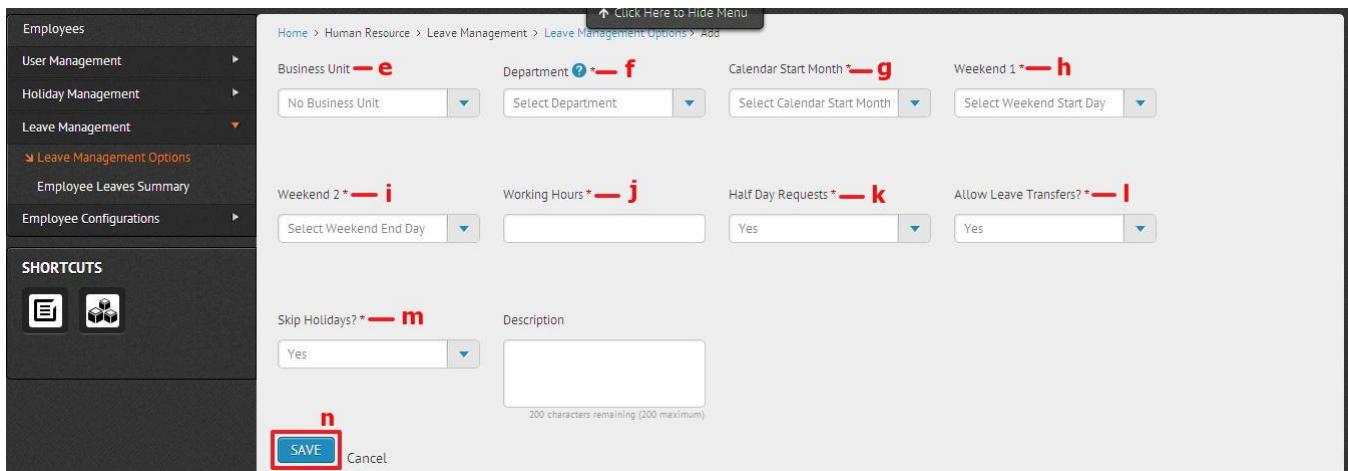


The screenshot shows the Sentrifugo HRMS interface. At the top, there is a navigation bar with various icons and links: Dashboard, Manage Modules, Site Configuration, Organization, Human Resource (which is highlighted with a red box and labeled 'a'), Resource Requisition, Employee Self Service, Background Checks, Service Request, Performance Appraisal, and Analytics. Below the navigation bar is a sidebar with several categories: Employees, User Management, Holiday Management, Leave Management (which is expanded and has 'Leave Management Options' under it), Employee Leaves Summary, and Employee Configurations. A red bracket labeled 'b' points to the 'Leave Management' category. A red box labeled 'c' highlights the 'Leave Management Options' link within that category. The main content area is titled 'LEAVE MANAGEMENT OPTIONS'. It contains a table with columns: Action, Start Month, Week-end 1, Week-end 2, Department, Hours, Halfday, Leave transferable, Skip Holidays, and Description. There is one row visible with values: Edit, Delete, January, Monday, Friday, Recruitment, 9, Yes, No, Yes, and an empty field. At the bottom of the table are search and filter buttons. To the right of the table, there is a 'Records per page' dropdown set to 20. In the top right corner of the main content area, there is a red box labeled 'd' highlighting the 'Add' button.

Figure 34

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

Refer Figure 35



The screenshot shows the 'Leave Management Options' page under the 'Leave Management' section of the Sentrifugo interface. The left sidebar has a dark theme with categories like 'Employees', 'User Management', 'Holiday Management', and 'Leave Management'. Under 'Leave Management', 'Leave Management Options' is selected. The main content area has a light background and contains several input fields and dropdown menus. Labels for the fields are preceded by red asterisks and lowercase letters (e through m). A 'Description' text area with a character limit of 200 is also present. At the bottom, there is a 'SAVE' button highlighted with a red box and a 'Cancel' link.

Figure 35

## What if I want to Apply a Leave Request:

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

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

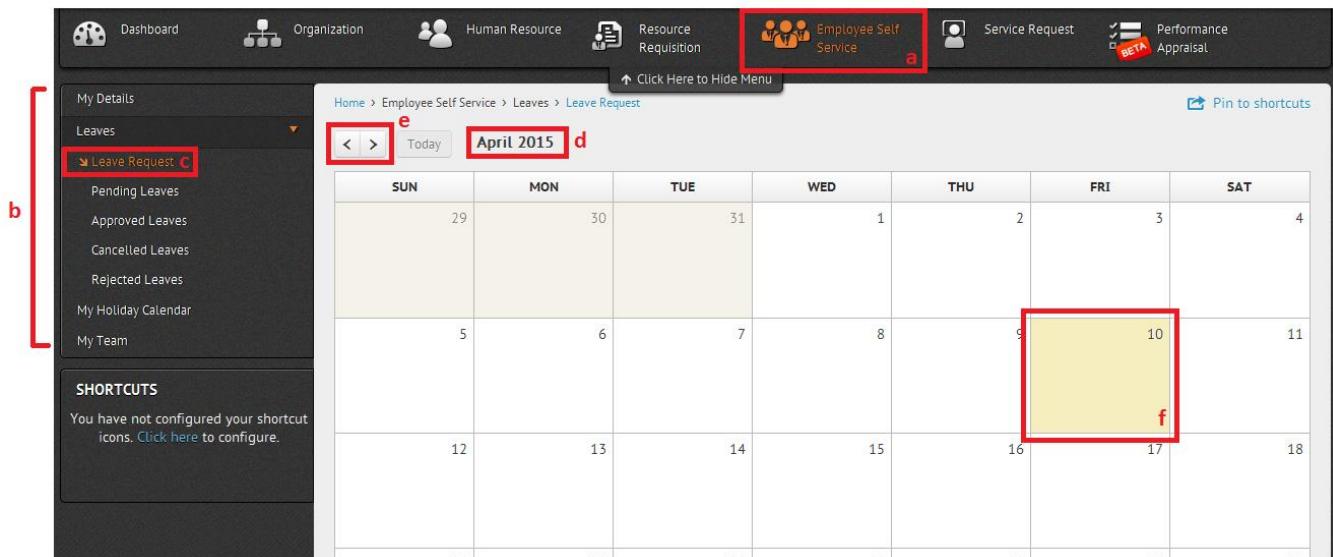


Figure 36

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

Refer Figure 37

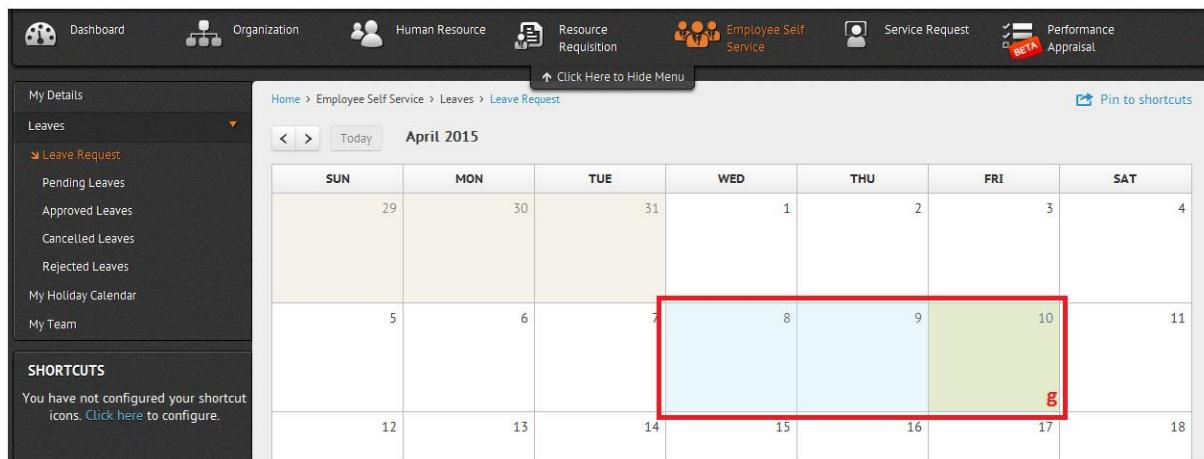
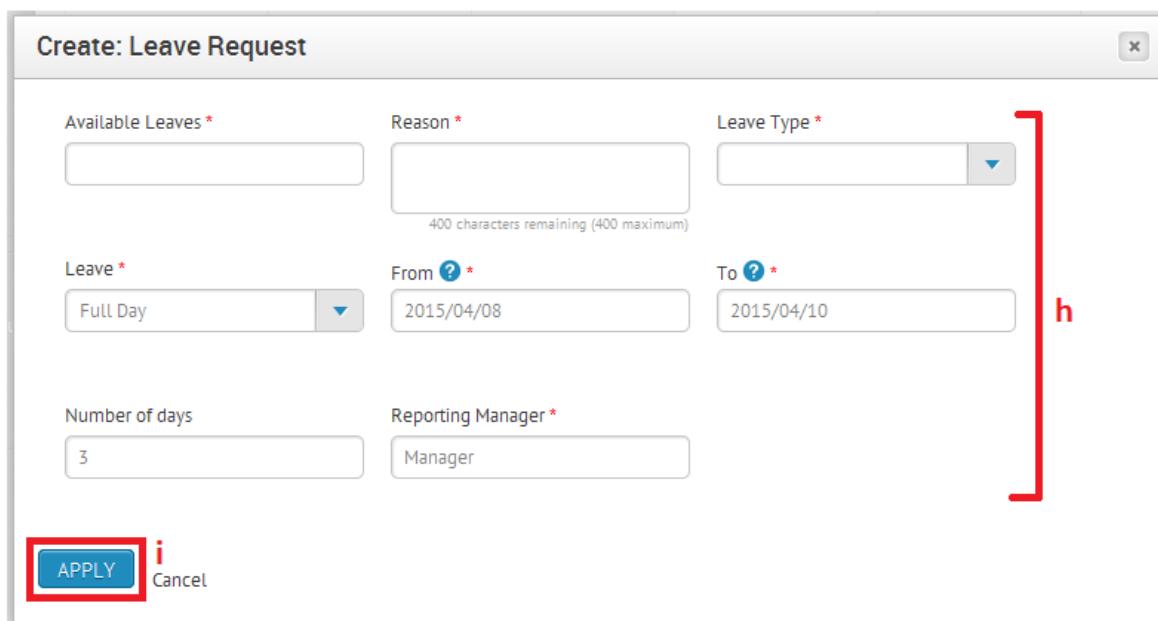


Figure 37

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

Refer Figure 38



**Create: Leave Request**

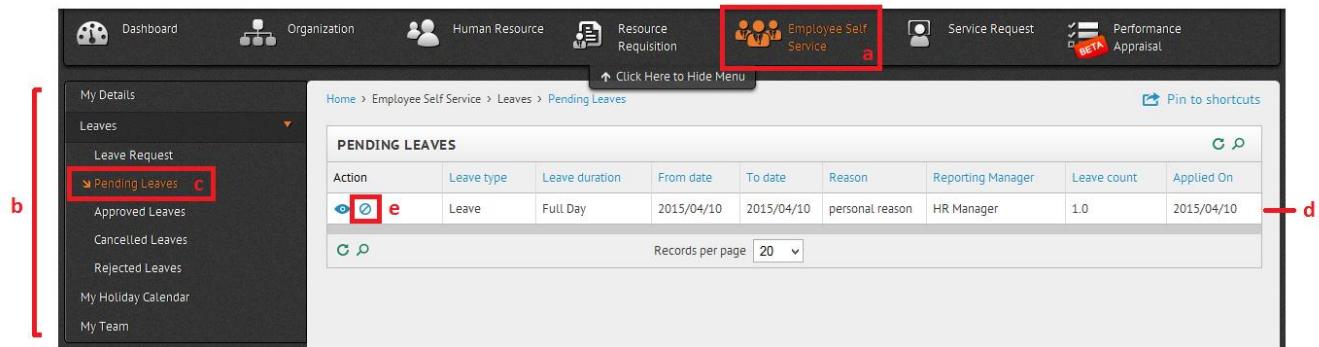
Available Leaves *	Reason *	Leave Type *
<input type="text"/>	<input type="text"/> 400 characters remaining (400 maximum)	<input type="text"/>
Leave *	From ? *	To ? *
<input type="text"/> Full Day	<input type="text"/> 2015/04/08	<input type="text"/> 2015/04/10
Number of days	Reporting Manager *	
<input type="text"/> 3	<input type="text"/> Manager	
<input type="button" value="APPLY"/> <span style="color: red;">i</span> <input type="button" value="Cancel"/>		

Figure 38

## How do I Cancel my Leave Request:

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

Refer Figure 39



The screenshot shows the Sentrifugo Employee Self-Service interface. At the top, there is a navigation bar with links for Dashboard, Organization, Human Resource, Resource Requisition, Employee Self Service (which is highlighted with a red box and labeled 'a'), Service Request, and Performance Appraisal. A dropdown menu is open on the left, under the 'Leaves' section, with 'Pending Leaves' selected (highlighted with a red box and labeled 'c'). The main content area displays a table titled 'PENDING LEAVES' with one row of data. The row contains columns for Action (with a delete icon highlighted with a red box and labeled 'e'), Leave type (Leave), Leave duration (Full Day), From date (2015/04/10), To date (2015/04/10), Reason (personal reason), Reporting Manager (HR Manager), Leave count (1.0), and Applied On (2015/04/10). A red bracket on the left labeled 'b' points to the 'Pending Leaves' option in the dropdown menu. A red bracket on the right labeled 'd' points to the 'Delete' icon in the table header.

Action	Leave type	Leave duration	From date	To date	Reason	Reporting Manager	Leave count	Applied On
 e	Leave	Full Day	2015/04/10	2015/04/10	personal reason	HR Manager	1.0	2015/04/10

Figure 39

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

Refer Figure 40

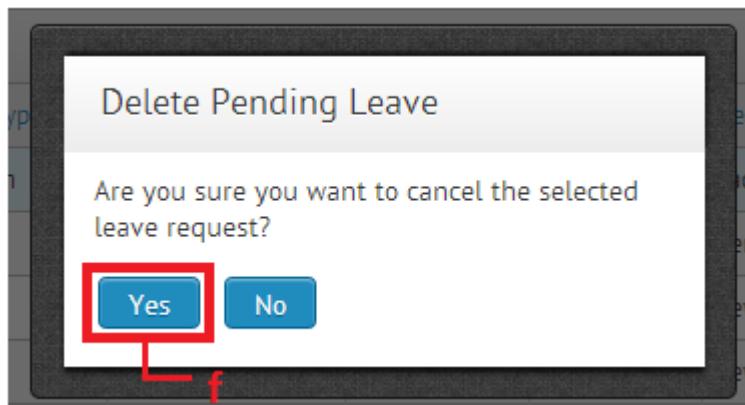
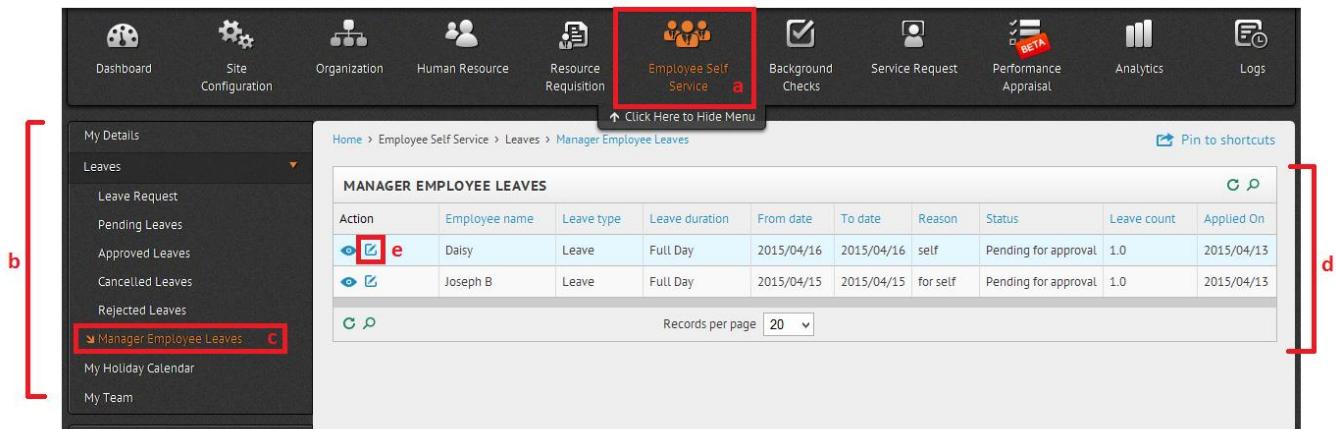


Figure 40

## How to Approve or Reject Leave Requests:

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

Refer Figure 41



Action	Employee name	Leave type	Leave duration	From date	To date	Reason	Status	Leave count	Applied On
	Daisy	Leave	Full Day	2015/04/16	2015/04/16	self	Pending for approval	1.0	2015/04/13
	Joseph B	Leave	Full Day	2015/04/15	2015/04/15	for self	Pending for approval	1.0	2015/04/13

Figure 41

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

Refer Figure 42

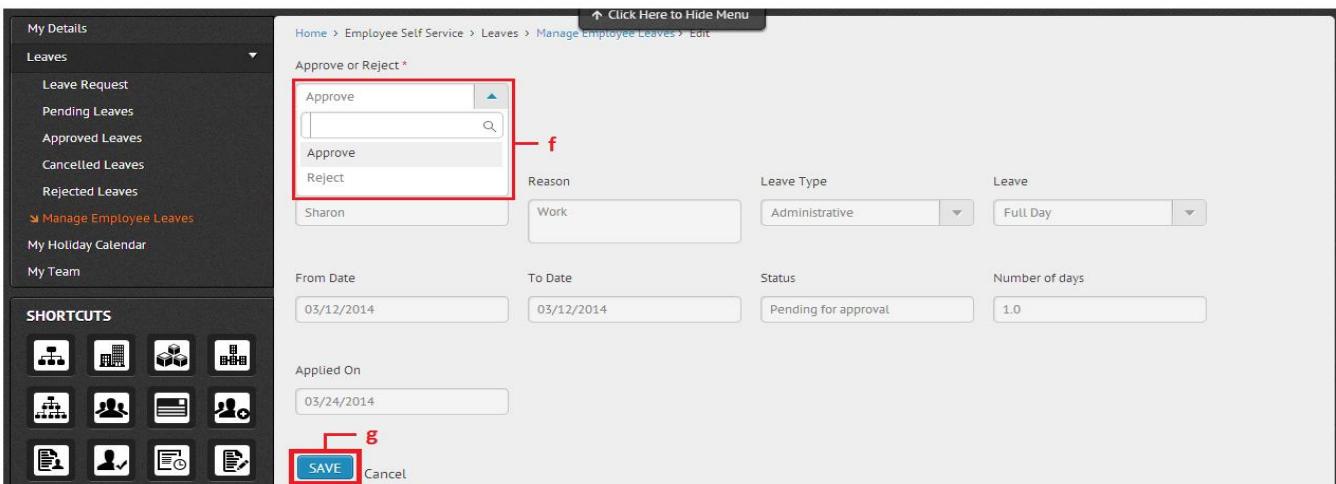


Figure 42

## How do I Raise a Resource Requisition:

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

Refer Figure 43

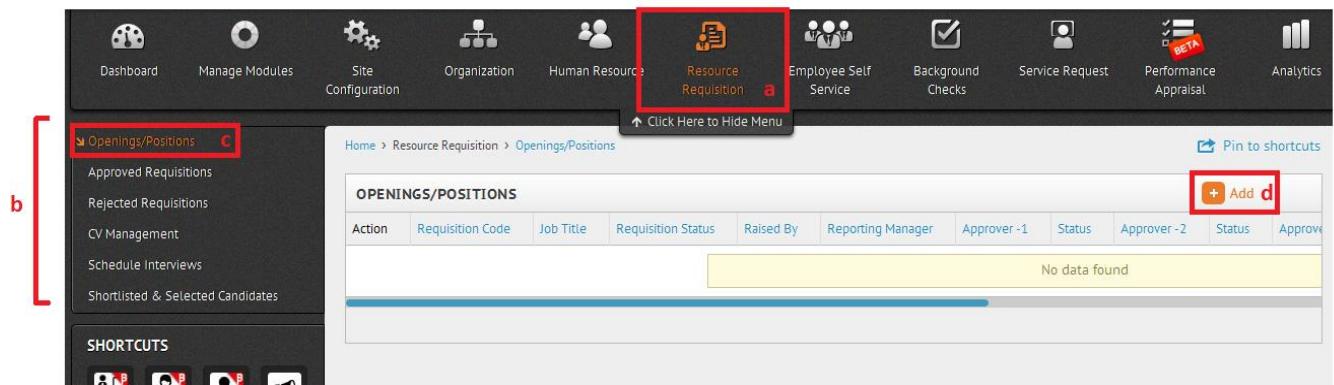
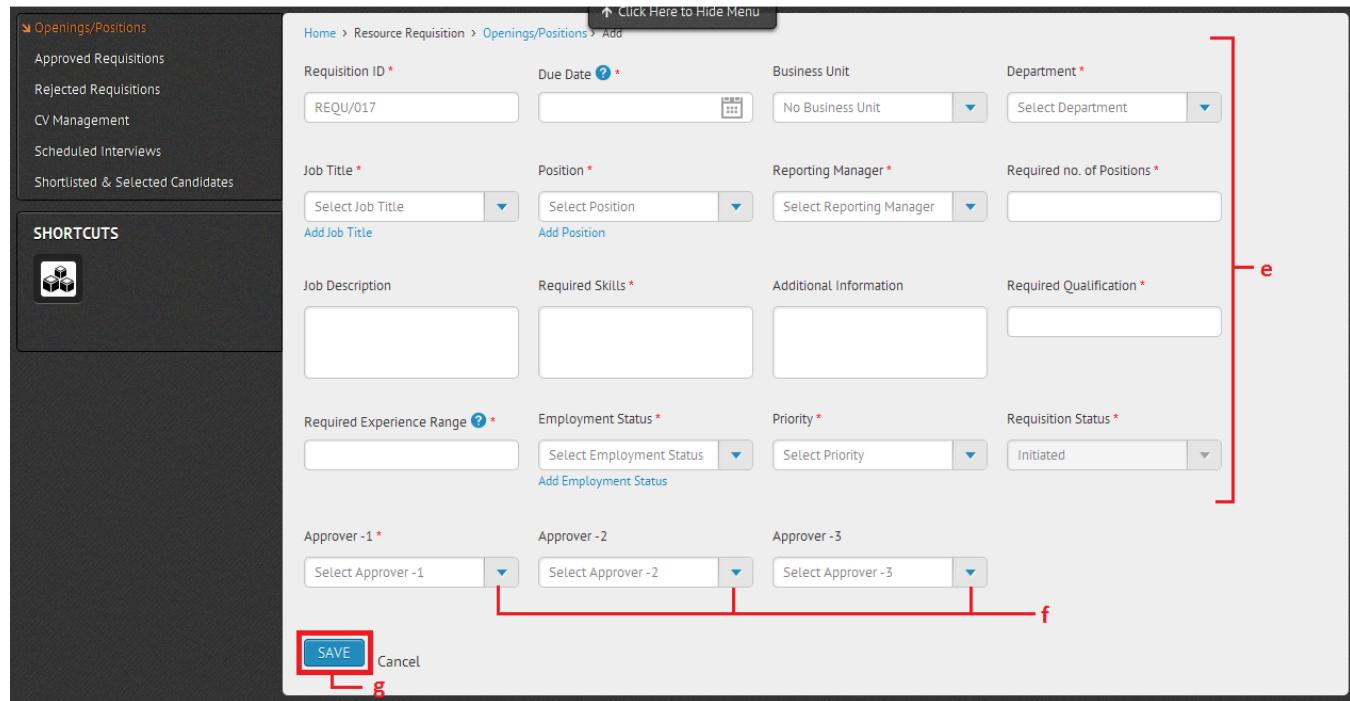


Figure 43

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

Refer Figure 44



Openings/Positions

Approved Requisitions  
Rejected Requisitions  
CV Management  
Scheduled Interviews  
Shortlisted & Selected Candidates

**SHORTCUTS**

Requisition ID \* : REQU/017      Due Date ? \* :       Business Unit : No Business Unit      Department \* : Select Department

Job Title \* : Select Job Title      Position \* : Select Position      Reporting Manager \* : Select Reporting Manager      Required no. of Positions \* :

Add Job Title      Add Position

Job Description      Required Skills \*      Additional Information      Required Qualification \*

Required Experience Range ? \* :       Employment Status \* : Select Employment Status      Priority \* : Select Priority      Requisition Status \* : Initiated

Add Employment Status

Approver -1 \* : Select Approver -1      Approver -2 : Select Approver -2      Approver -3 : Select Approver -3

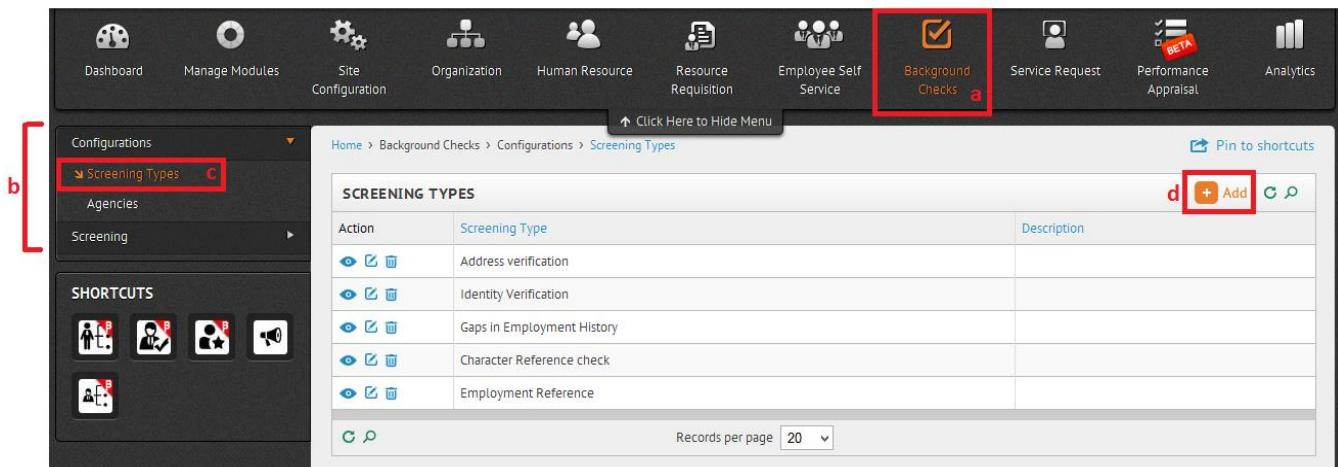
**Buttons:**  (highlighted with a red box)      Cancel

Figure 44

## Where do I Add Screening Type for Background Checks:

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

Refer Figure 45



Action	Screening Type	Description
	Address verification	
	Identity Verification	
	Gaps in Employment History	
	Character Reference check	
	Employment Reference	

Figure 45

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

Refer Figure 46

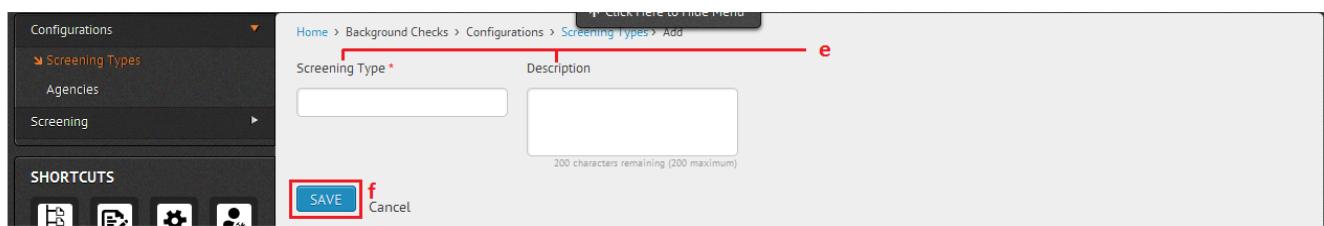
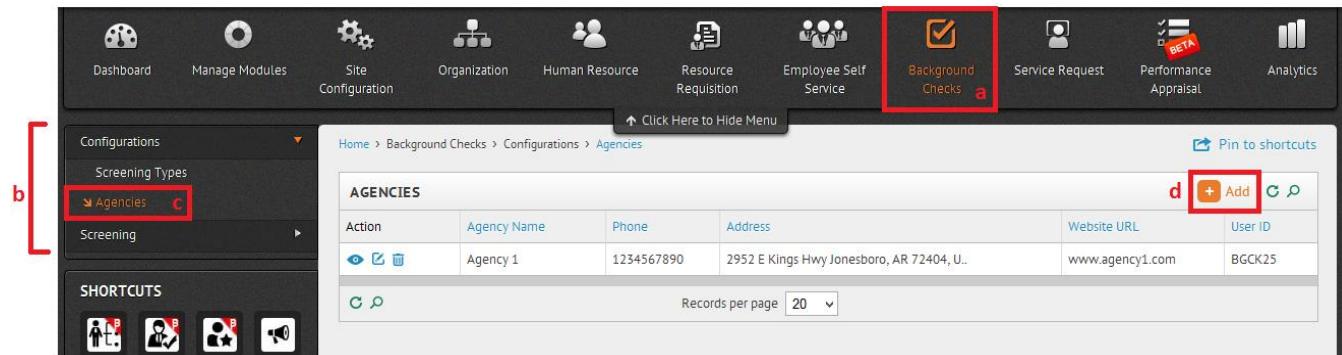


Figure 46

## How do I Add an Agency to Perform Background Checks:

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

Refer Figure 47

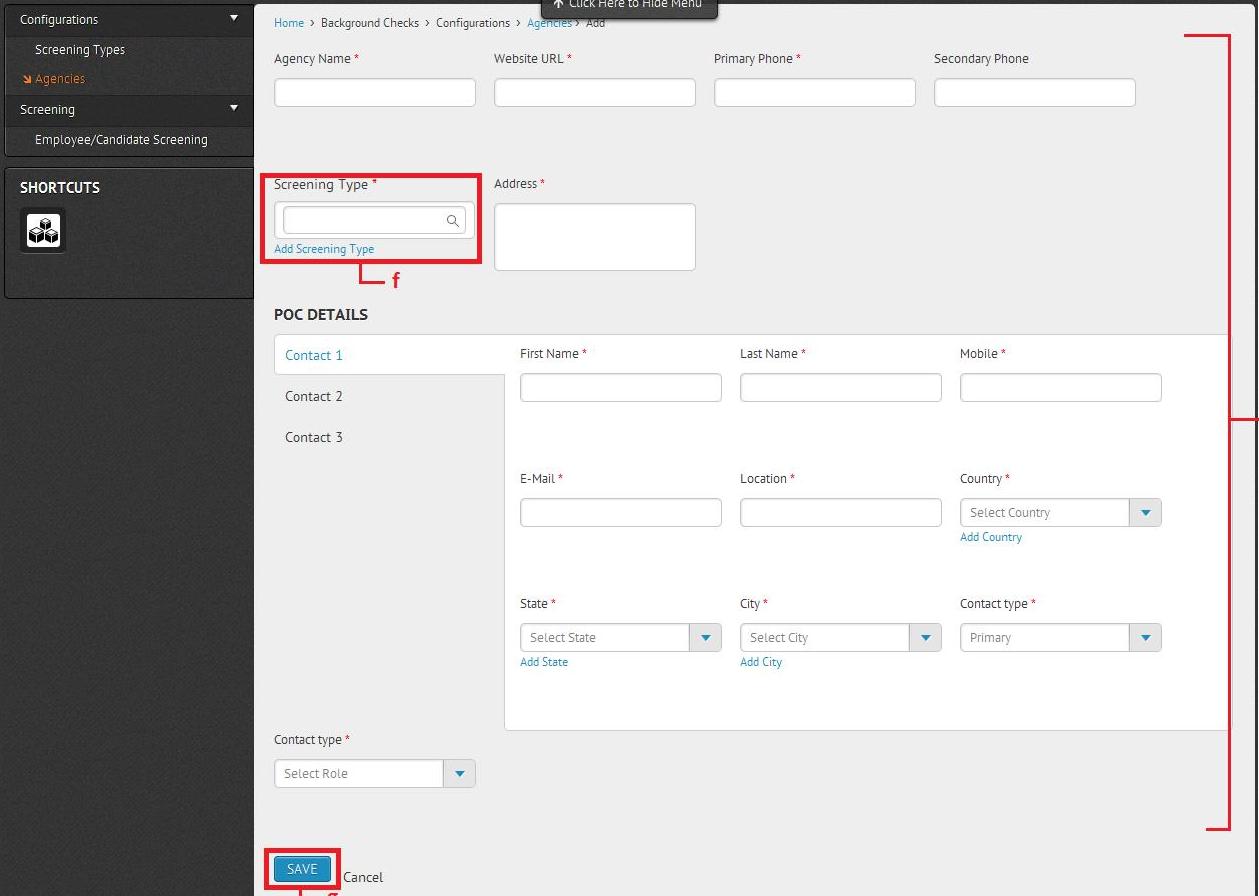


Action	Agency Name	Phone	Address	Website URL	User ID
	Agency 1	1234567890	2952 E Kings Hwy Jonesboro, AR 72404, U.	www.agency1.com	BGCK25

Figure 47

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

Refer Figure 48



The screenshot shows the 'Agencies' add form in the Sentrifugo interface. The left sidebar has 'Configurations' expanded, with 'Screening Types' selected. Under 'Screening Types', 'Agencies' is also selected. The main form area has the following fields:

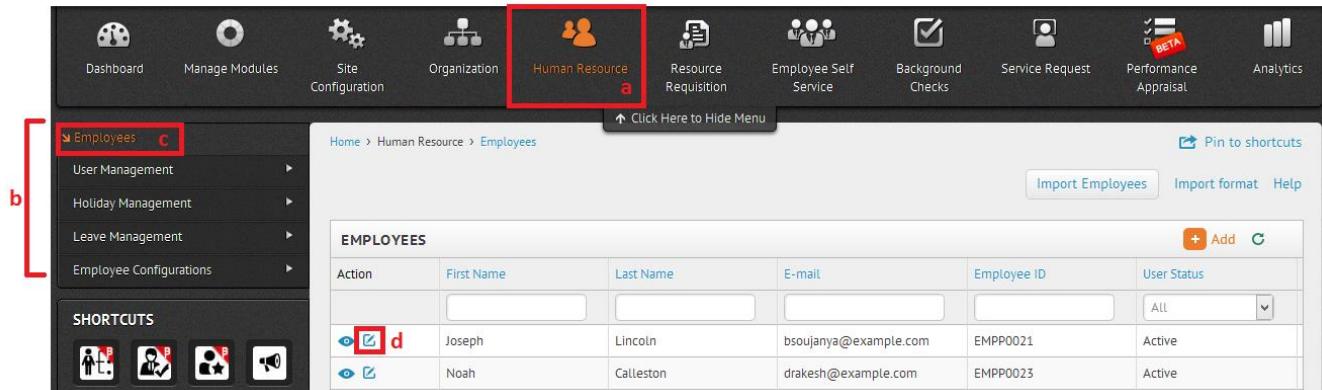
- Agency Name \***: An input field.
- Website URL \***: An input field.
- Primary Phone \***: An input field.
- Secondary Phone**: An input field.
- Screening Type \***: A dropdown menu with a search icon. It is highlighted with a red box and labeled 'f'.
- Address \***: A text input field.
- POC DETAILS** section:
  - Contact 1**: Fields for First Name, Last Name, and Mobile.
  - Contact 2**: A text input field.
  - Contact 3**: A text input field.
  - E-Mail \***: An input field.
  - Location \***: An input field.
  - Country \***: A dropdown menu with 'Select Country' and 'Add Country' options. It is highlighted with a red box and labeled 'e'.
  - State \***: A dropdown menu with 'Select State' and 'Add State' options.
  - City \***: A dropdown menu with 'Select City' and 'Add City' options.
  - Contact type \***: A dropdown menu with 'Primary' and other options.
  - Contact type \***: A dropdown menu with 'Select Role' and other options.
- SAVE** button: A blue button with white text. It is highlighted with a red box and labeled 'g'.
- Cancel** button: A standard grey button next to the 'SAVE' button.

Figure 48

## Can I Send an Employee for Background Checks:

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

Refer Figure 49



Action	First Name	Last Name	E-mail	Employee ID	User Status
	Joseph	Lincoln	bsoujanya@example.com	EMPP0021	Active
	Noah	Calleston	drakesh@example.com	EMPP0023	Active

Figure 49

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

Refer Figure 50

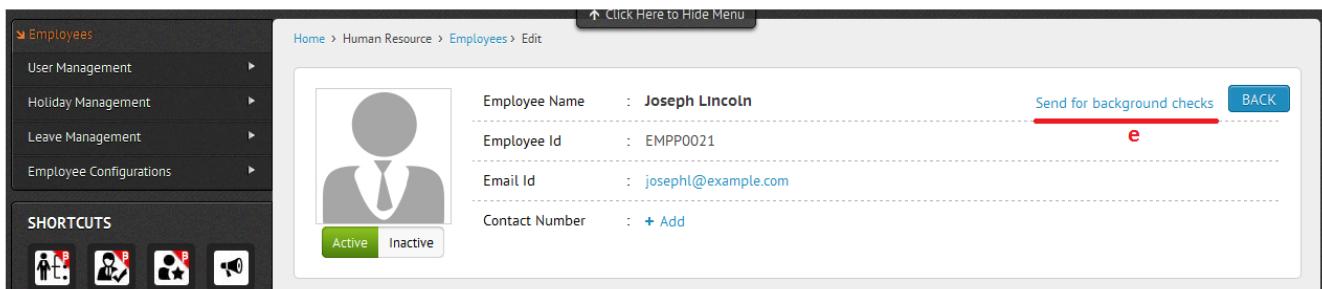


Figure 50

## Want to View & Generate Reports:

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

Refer Figure 51

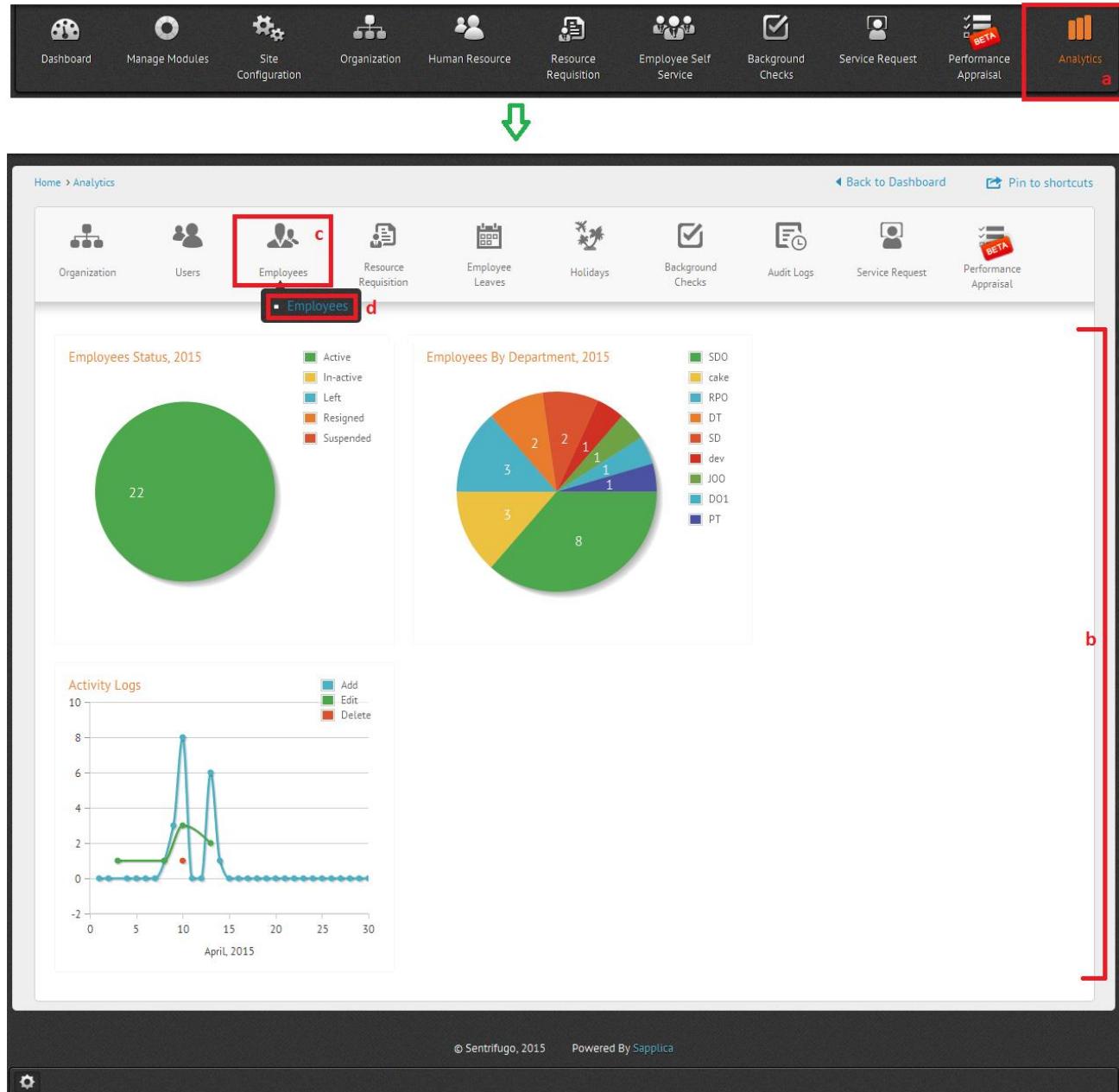
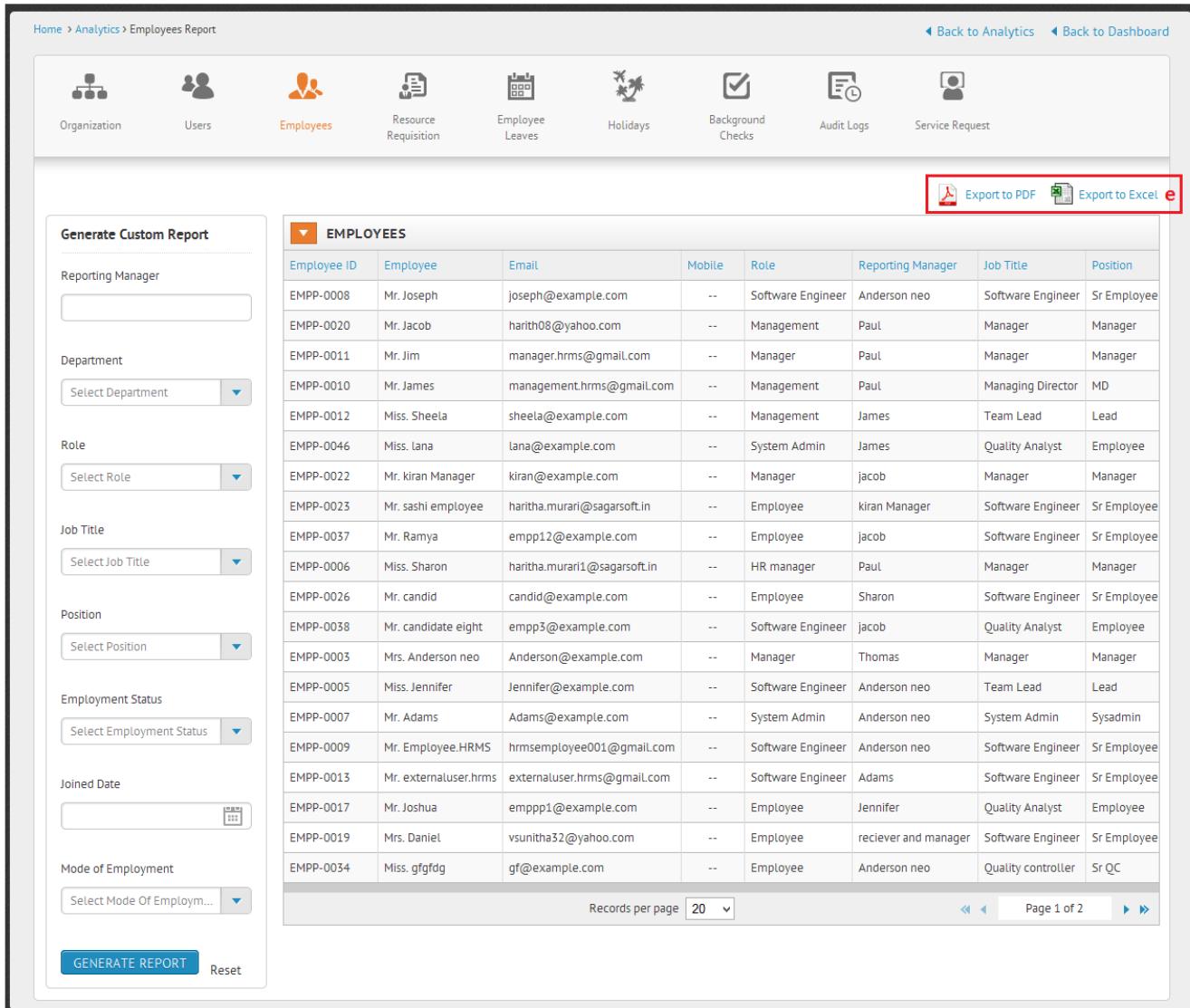


Figure 51

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

Refer Figure 52



The screenshot shows the 'Employees Report' page under the 'Analytics' section. On the left, there is a sidebar with filters for 'Generate Custom Report' including Reporting Manager, Department, Role, Job Title, Position, Employment Status, Joined Date, and Mode of Employment. Below these filters are 'GENERATE REPORT' and 'Reset' buttons. The main area displays a table titled 'EMPLOYEES' with 34 rows of employee data. The columns are: Employee ID, Employee, Email, Mobile, Role, Reporting Manager, Job Title, and Position. The table includes sample data such as EMPP-0008 (Mr. Joseph) and EMPP-0034 (Miss. gfgfdg). At the bottom right of the table, there are buttons for 'Records per page' (set to 20), 'Page 1 of 2', and navigation arrows. The 'Export to PDF' and 'Export to Excel' buttons at the top right are highlighted with a red box.

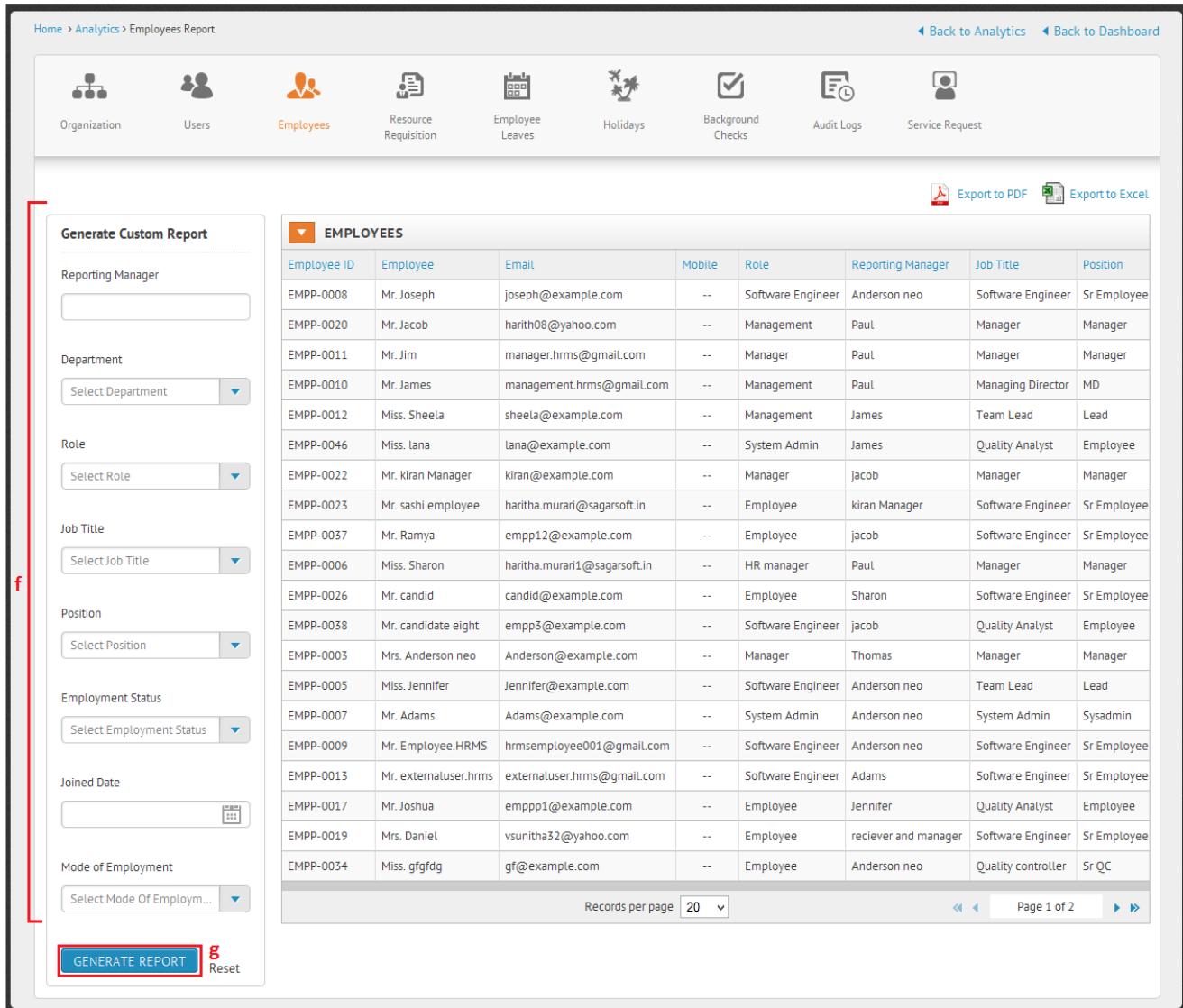
Employee ID	Employee	Email	Mobile	Role	Reporting Manager	Job Title	Position
EMPP-0008	Mr. Joseph	joseph@example.com	--	Software Engineer	Anderson neo	Software Engineer	Sr Employee
EMPP-0020	Mr. Jacob	harith08@yahoo.com	--	Management	Paul	Manager	Manager
EMPP-0011	Mr. Jim	manager.hrms@gmail.com	--	Manager	Paul	Manager	Manager
EMPP-0010	Mr. James	management.hrms@gmail.com	--	Management	Paul	Managing Director	MD
EMPP-0012	Miss. Sheela	sheela@example.com	--	Management	James	Team Lead	Lead
EMPP-0046	Miss. lana	lana@example.com	--	System Admin	James	Quality Analyst	Employee
EMPP-0022	Mr. kiran Manager	kiran@example.com	--	Manager	jacob	Manager	Manager
EMPP-0023	Mr. sashi employee	haritha.murari@sagarsoft.in	--	Employee	kiran Manager	Software Engineer	Sr Employee
EMPP-0037	Mr. Ramya	empp12@example.com	--	Employee	jacob	Software Engineer	Sr Employee
EMPP-0006	Miss. Sharon	haritha.murari1@sagarsoft.in	--	HR manager	Paul	Manager	Manager
EMPP-0026	Mr. candid	candid@example.com	--	Employee	Sharon	Software Engineer	Sr Employee
EMPP-0038	Mr. candidate eight	empp3@example.com	--	Software Engineer	jacob	Quality Analyst	Employee
EMPP-0003	Mrs. Anderson neo	Anderson@example.com	--	Manager	Thomas	Manager	Manager
EMPP-0005	Miss. Jennifer	Jennifer@example.com	--	Software Engineer	Anderson neo	Team Lead	Lead
EMPP-0007	Mr. Adams	Adams@example.com	--	System Admin	Anderson neo	System Admin	Sysadmin
EMPP-0009	Mr. Employee.HRMS	hrmsemployee001@gmail.com	--	Software Engineer	Anderson neo	Software Engineer	Sr Employee
EMPP-0013	Mr. externaluser.hrms	externaluser.hrms@gmail.com	--	Software Engineer	Adams	Software Engineer	Sr Employee
EMPP-0017	Mr. Joshua	emppp1@example.com	--	Employee	Jennifer	Quality Analyst	Employee
EMPP-0019	Mrs. Daniel	vsunitha32@yahoo.com	--	Employee	reciever and manager	Software Engineer	Sr Employee
EMPP-0034	Miss. gfgfdg	gf@example.com	--	Employee	Anderson neo	Quality controller	Sr QC

Figure 52

Or, to generate custom reports

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

Refer Figure 53



Home > Analytics > Employees Report

◀ Back to Analytics ▶ Back to Dashboard

Organization Users Employees Resource Requisition Employee Leaves Holidays Background Checks Audit Logs Service Request

Export to PDF Export to Excel

EMPLOYEES							
Employee ID	Employee	Email	Mobile	Role	Reporting Manager	Job Title	Position
EMPP-0008	Mr. Joseph	joseph@example.com	--	Software Engineer	Anderson neo	Software Engineer	Sr Employee
EMPP-0020	Mr. Jacob	harith08@yahoo.com	--	Management	Paul	Manager	Manager
EMPP-0011	Mr. Jim	manager.hrms@gmail.com	--	Manager	Paul	Manager	Manager
EMPP-0010	Mr. James	management.hrms@gmail.com	--	Management	Paul	Managing Director	MD
EMPP-0012	Miss. Sheela	sheela@example.com	--	Management	James	Team Lead	Lead
EMPP-0046	Miss. lana	lana@example.com	--	System Admin	James	Quality Analyst	Employee
EMPP-0022	Mr. kiran Manager	kiran@example.com	--	Manager	jacob	Manager	Manager
EMPP-0023	Mr. sashi employee	haritha.murari@sagarsoft.in	--	Employee	kiran Manager	Software Engineer	Sr Employee
EMPP-0037	Mr. Ramya	empp12@example.com	--	Employee	jacob	Software Engineer	Sr Employee
EMPP-0006	Miss. Sharon	haritha.murari1@sagarsoft.in	--	HR manager	Paul	Manager	Manager
EMPP-0026	Mr. candid	candid@example.com	--	Employee	Sharon	Software Engineer	Sr Employee
EMPP-0038	Mr. candidate eight	empp3@example.com	--	Software Engineer	jacob	Quality Analyst	Employee
EMPP-0003	Mrs. Anderson neo	Anderson@example.com	--	Manager	Thomas	Manager	Manager
EMPP-0005	Miss. Jennifer	Jennifer@example.com	--	Software Engineer	Anderson neo	Team Lead	Lead
EMPP-0007	Mr. Adams	Adams@example.com	--	System Admin	Anderson neo	System Admin	Sysadmin
EMPP-0009	Mr. Employee.HRMS	hrmsemployee001@gmail.com	--	Software Engineer	Anderson neo	Software Engineer	Sr Employee
EMPP-0013	Mr. externaluser.hrms	externaluser.hrms@gmail.com	--	Software Engineer	Adams	Software Engineer	Sr Employee
EMPP-0017	Mr. Joshua	emppp1@example.com	--	Employee	Jennifer	Quality Analyst	Employee
EMPP-0019	Mrs. Daniel	vsunitha32@yahoo.com	--	Employee	reciever and manager	Software Engineer	Sr Employee
EMPP-0034	Miss. gfgfdg	gf@example.com	--	Employee	Anderson neo	Quality controller	Sr QC

Records per page: 20 | Page 1 of 2 | ▲ ▼ ▶ ▷

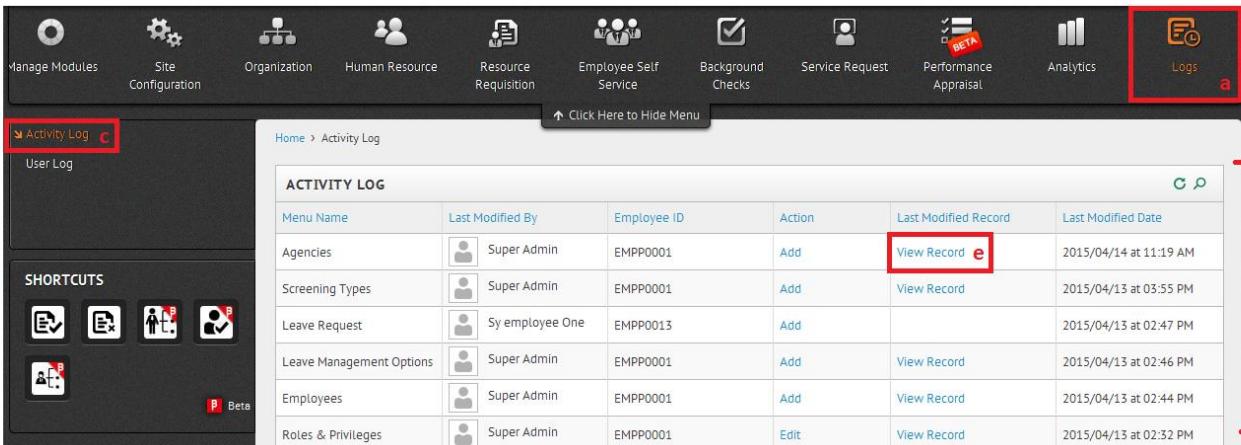
**GENERATE REPORT** **g** Reset

Figure 53

## Where can you View Activity log:

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

Refer Figure 54



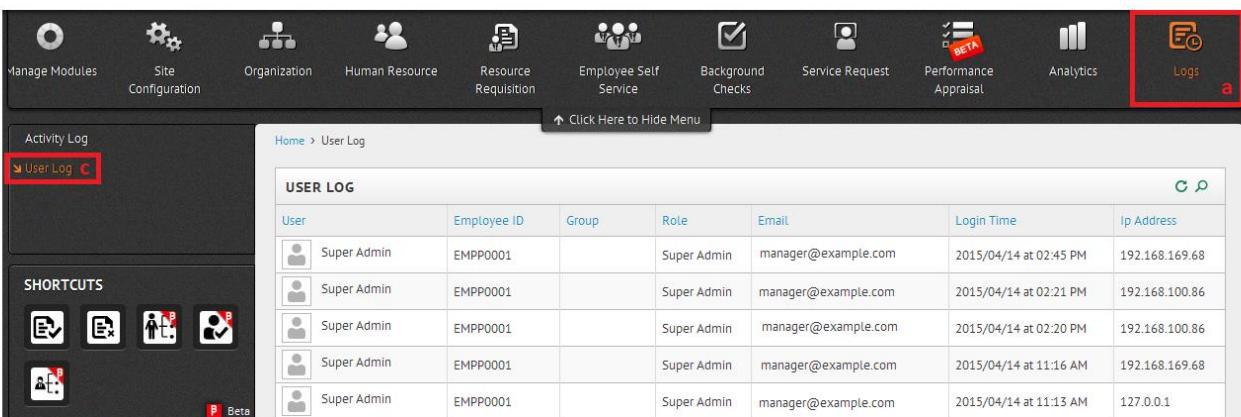
Menu Name	Last Modified By	Employee ID	Action	Last Modified Record	Last Modified Date
Agencies	Super Admin	EMPP0001	Add	<a href="#">View Record e</a>	2015/04/14 at 11:19 AM
Screening Types	Super Admin	EMPP0001	Add	<a href="#">View Record</a>	2015/04/13 at 03:55 PM
Leave Request	Sy employee One	EMPP0013	Add		2015/04/13 at 02:47 PM
Leave Management Options	Super Admin	EMPP0001	Add	<a href="#">View Record</a>	2015/04/13 at 02:46 PM
Employees	Super Admin	EMPP0001	Add	<a href="#">View Record</a>	2015/04/13 at 02:44 PM
Roles & Privileges	Super Admin	EMPP0001	Edit	<a href="#">View Record</a>	2015/04/13 at 02:32 PM

Figure 54

## Where can I View User log:

- Click on Logs in the top menu
- The left side panel will display the submenus
- Click on User log
- View the logs of all the users in the right side panel

Refer Figure 55



User	Employee ID	Group	Role	Email	Login Time	Ip Address
Super Admin	EMPP0001		Super Admin	manager@example.com	2015/04/14 at 02:45 PM	192.168.169.68
Super Admin	EMPP0001		Super Admin	manager@example.com	2015/04/14 at 02:21 PM	192.168.100.86
Super Admin	EMPP0001		Super Admin	manager@example.com	2015/04/14 at 02:20 PM	192.168.100.86
Super Admin	EMPP0001		Super Admin	manager@example.com	2015/04/14 at 11:16 AM	192.168.169.68
Super Admin	EMPP0001		Super Admin	manager@example.com	2015/04/14 at 11:13 AM	127.0.0.1

Figure 55

## Looking to Set Shortcuts:

- Click on the organization logo in the top left of the header
- Click on Click here link in the Shortcuts panel in the left side

Refer Figure 56

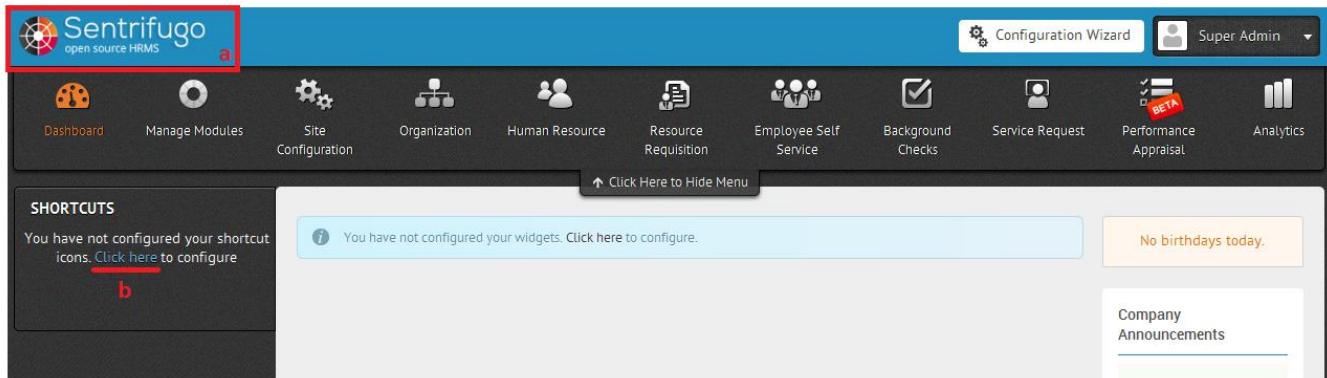


Figure 56

Or

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

Refer Figure 57

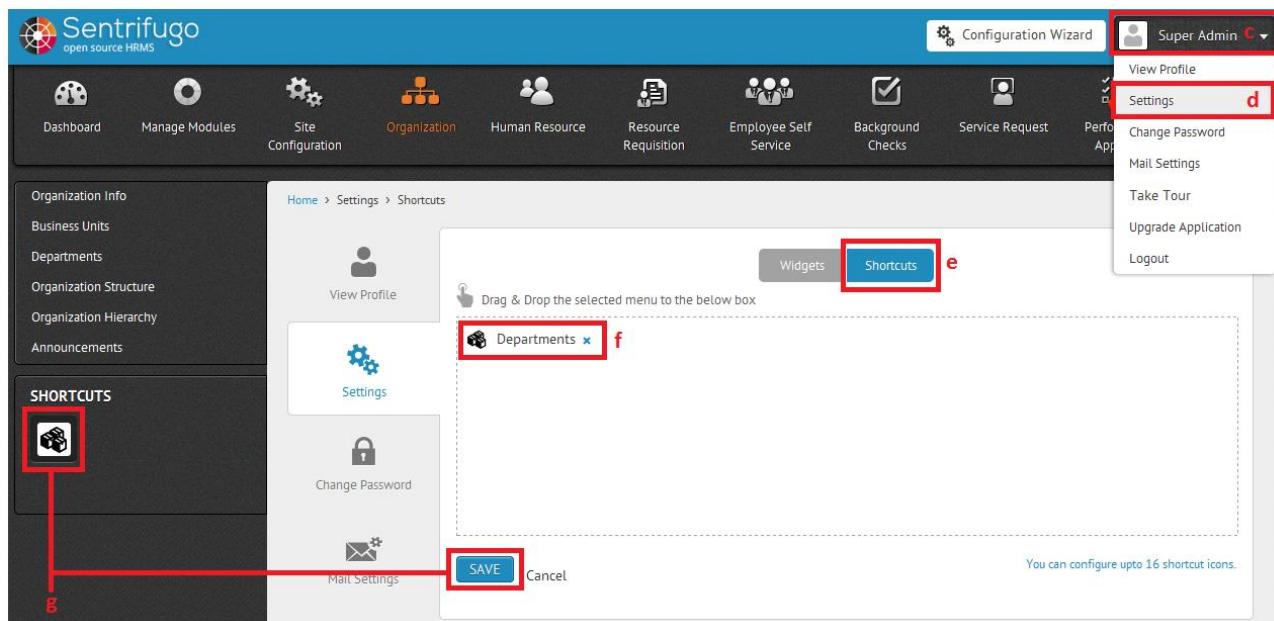
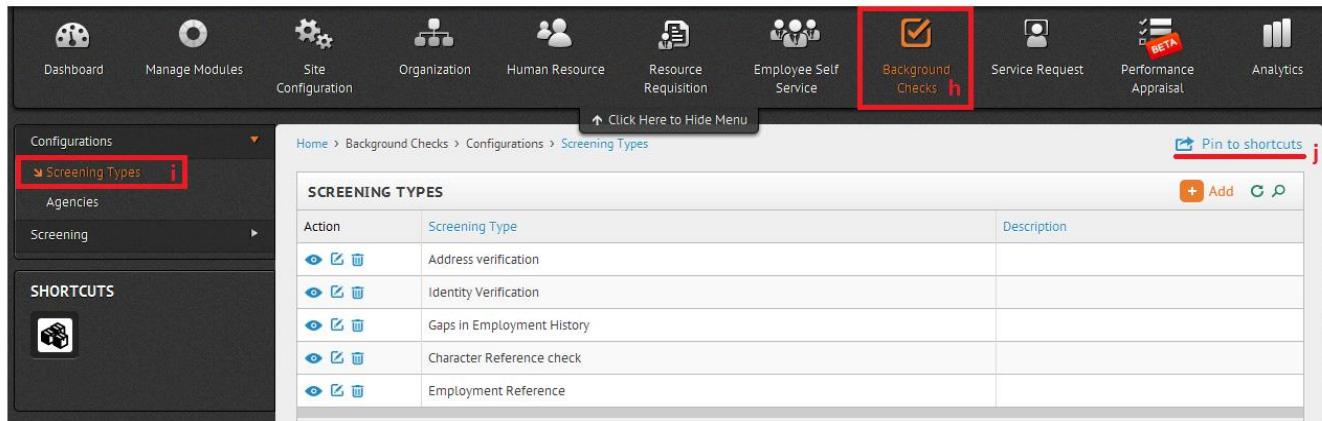


Figure 57

You can also create Shortcuts as you browse through the application

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

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



The screenshot shows the Sentrifugo application interface. The top navigation bar includes icons for Dashboard, Manage Modules, Site Configuration, Organization, Human Resource, Resource Requisition, Employee Self Service, Background Checks (highlighted with a red box), Service Request, Performance Appraisal, and Analytics. Below the navigation bar is a sidebar with 'Configurations' expanded, showing 'Screening Types' (also highlighted with a red box) and 'Agencies'. The main content area displays a table titled 'SCREENING TYPES' with the following data:

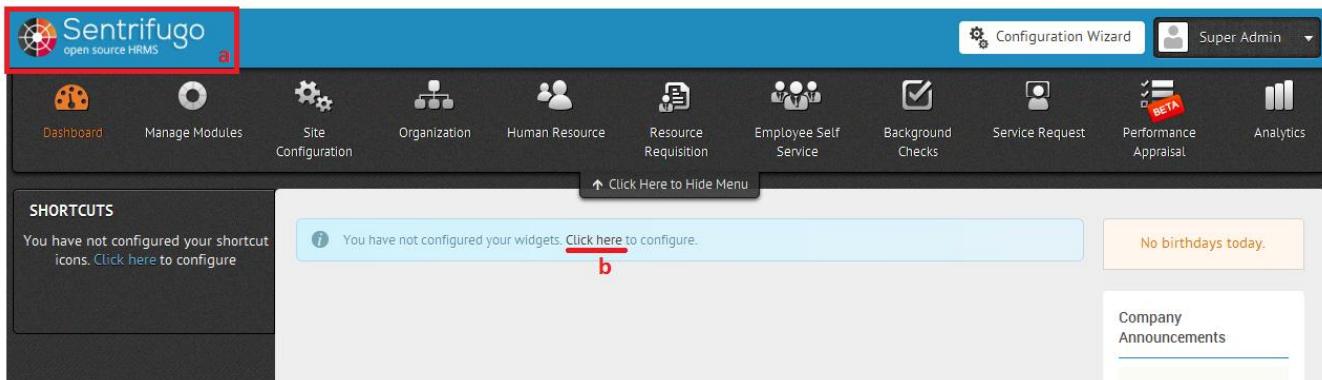
Action	Screening Type	Description
	Address verification	
	Identity Verification	
	Gaps in Employment History	
	Character Reference check	
	Employment Reference	

Figure 58

## Looking to Set Widgets:

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

Refer figure 59



The screenshot shows the Sentrifugo application interface. The top navigation bar includes icons for Dashboard, Manage Modules, Site Configuration, Organization, Human Resource, Resource Requisition, Employee Self Service, Background Checks (highlighted with a red box), Service Request, Performance Appraisal, and Analytics. The top right corner features a 'Configuration Wizard' button and a 'Super Admin' dropdown. The sidebar on the left shows 'SHORTCUTS' with the message 'You have not configured your shortcut icons. Click here to configure.' A red box labeled 'a' points to the 'Configuration Wizard' button. A red box labeled 'b' points to a blue tooltip in the right side panel containing the text 'You have not configured your widgets. Click here to configure.' The right side panel also displays a message 'No birthdays today.' and a section for 'Company Announcements'.

Figure 59

Or

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

Or

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

Refer Figure 60

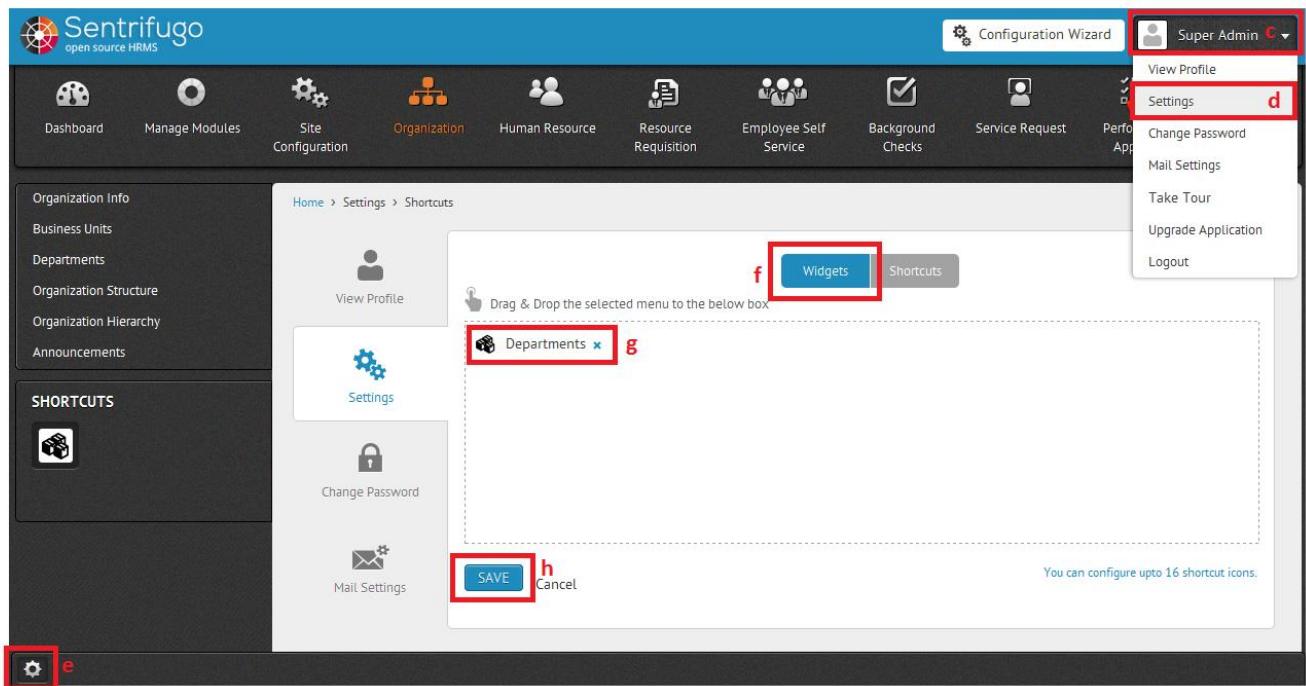
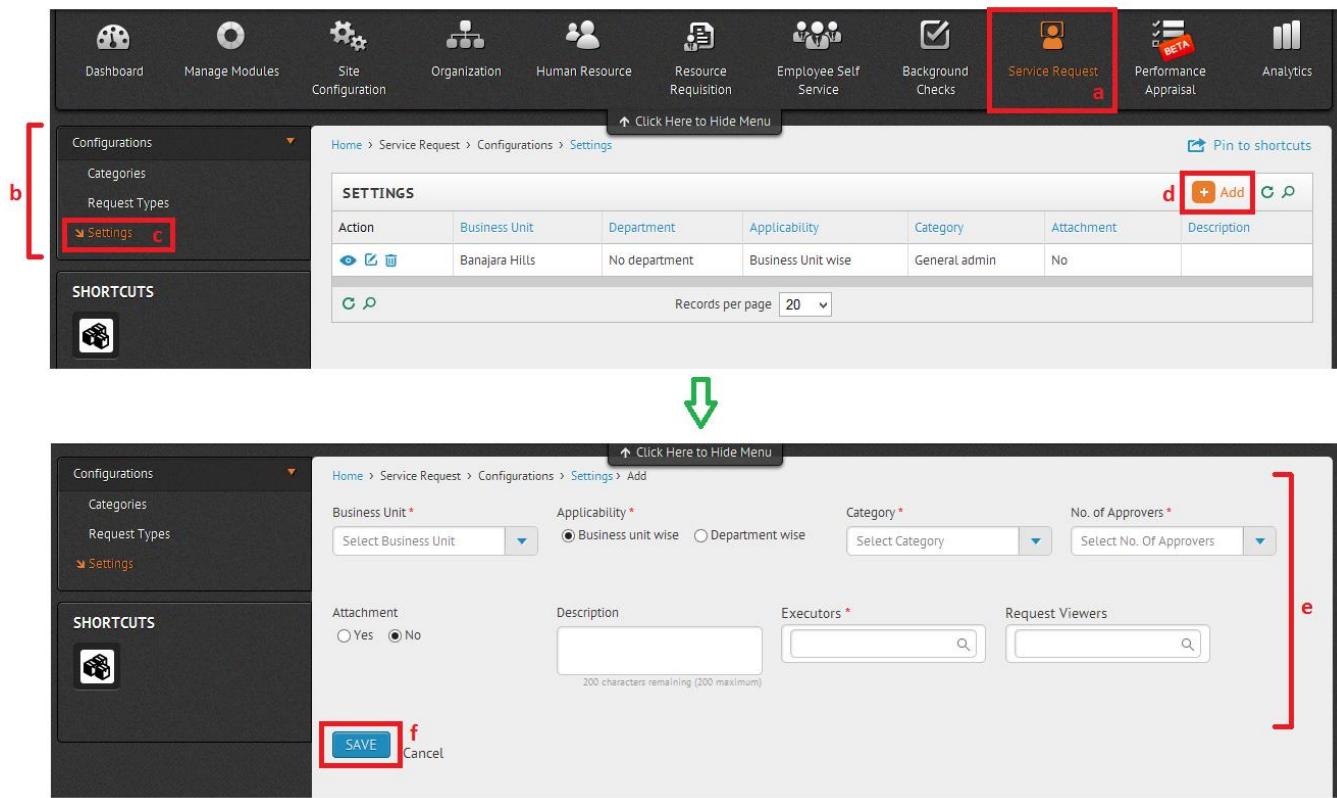


Figure 60

## Want to Configure Service Request:

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

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



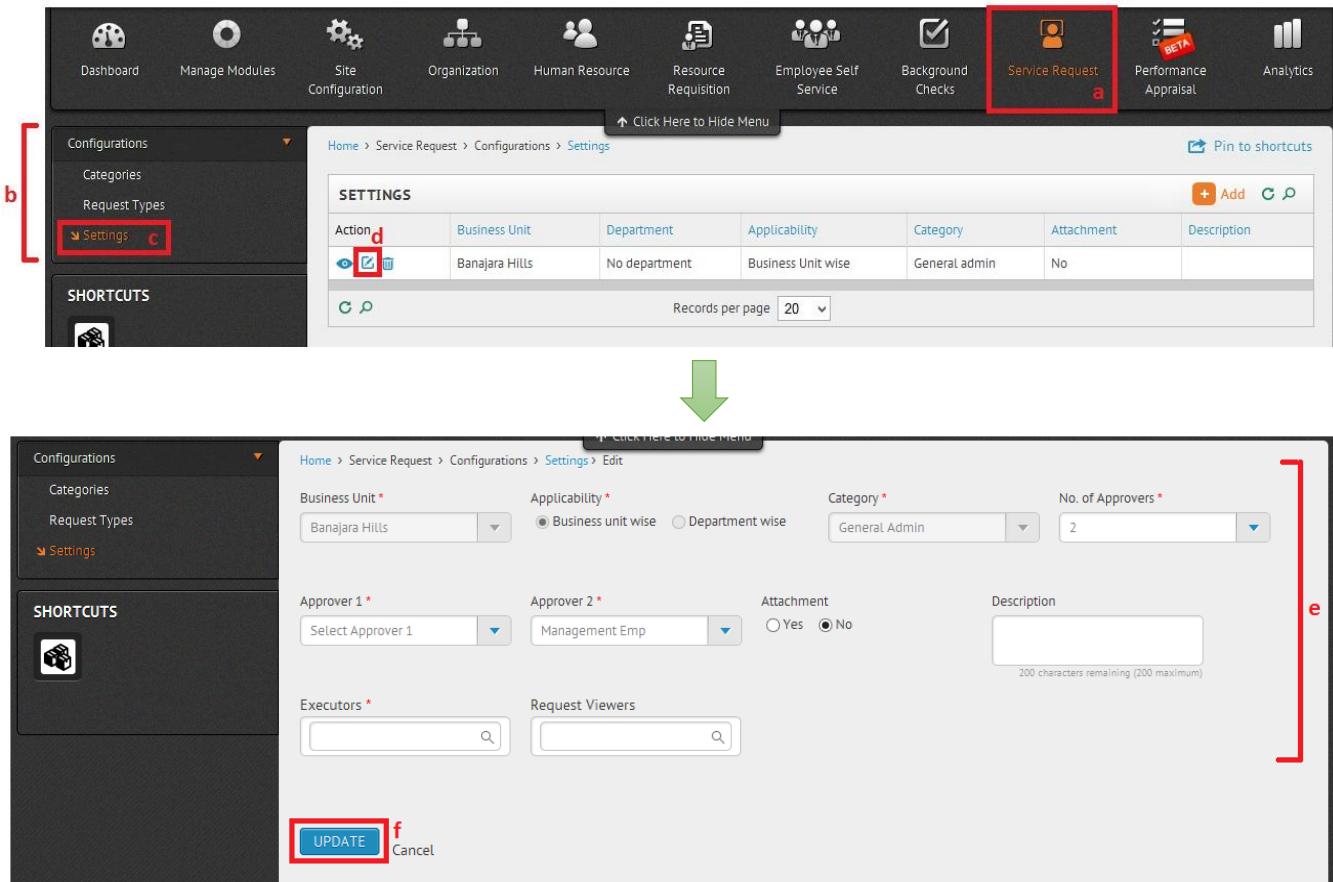
The figure consists of two screenshots of the Sentrifugo application interface. The top screenshot shows the main navigation bar with various modules like Dashboard, Manage Modules, Site Configuration, Organization, Human Resource, Resource Requisition, Employee Self Service, Background Checks, Service Request (which is highlighted with a red box), Performance Appraisal, and Analytics. Below the navigation bar is a sidebar with 'Configurations' expanded, showing 'Categories', 'Request Types', and 'Settings' (which is also highlighted with a red box). A red bracket labeled 'b' points to the sidebar. The main content area shows a table titled 'SETTINGS' with columns for Action, Business Unit, Department, Applicability, Category, Attachment, and Description. One row is visible: Action is 'Edit', Business Unit is 'Banajara Hills', Department is 'No department', Applicability is 'Business Unit wise', Category is 'General admin', Attachment is 'No', and Description is empty. A red box labeled 'd' highlights the '+ Add' button in the top right of the table. A green arrow points down from the table to the second screenshot. The second screenshot shows a detailed 'Add' form for 'Settings'. It has fields for Business Unit (with 'Select Business Unit' dropdown), Applicability (radio buttons for 'Business unit wise' and 'Department wise'), Category (dropdown), and No. of Approvers (dropdown). Below these are sections for Attachment (radio buttons for 'Yes' and 'No'), Description (text area with character limit), Executors (dropdown), and Request Viewers (dropdown). At the bottom are 'SAVE' and 'Cancel' buttons, with a red box labeled 'f' highlighting the 'SAVE' button. A red bracket labeled 'e' points to the right side of this form.

Figure 61

## Want to Edit Service Request:

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

Refer Figure 62



The figure consists of two screenshots of the Sentrifugo application interface, connected by a large green downward arrow.

**Top Screenshot (Left Panel Labels):**

- a:** A red box highlights the "Service Request" icon in the top navigation bar.
- b:** A red bracket on the left sidebar groups "Configurations", "Categories", and "Request Types".
- c:** A red box highlights the "Settings" link under the "Request Types" section of the sidebar.
- d:** A red box highlights the edit icon (pencil) in the "SETTINGS" table.

**Bottom Screenshot (Right Panel Labels):**

- e:** A red bracket groups the "Business Unit", "Applicability", "Category", and "No. of Approvers" fields.
- f:** A red box highlights the "UPDATE" button at the bottom of the form.

**Common UI Elements:**

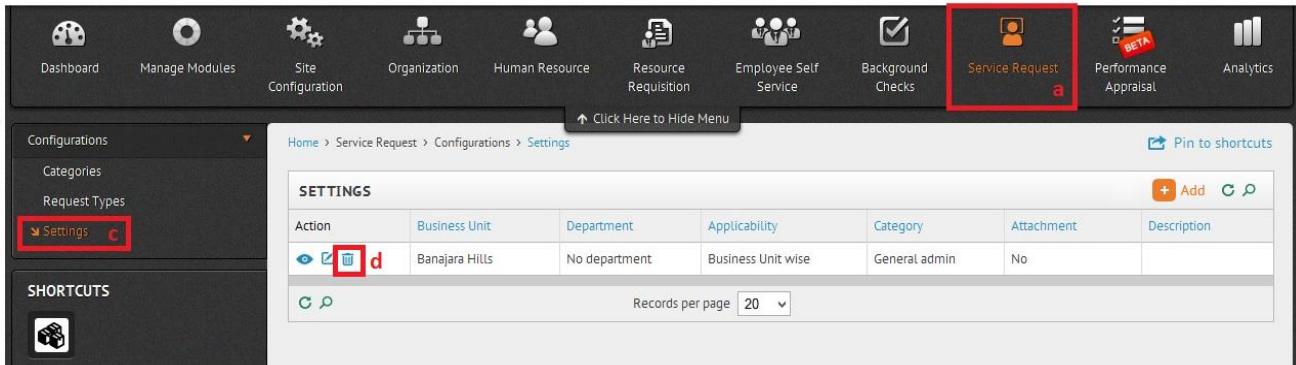
- Top Navigation Bar: Dashboard, Manage Modules, Site Configuration, Organization, Human Resource, Resource Requisition, Employee Self Service, Background Checks, Service Request (highlighted), Performance Appraisal (Beta), Analytics.
- Left Sidebar: Configurations, Categories, Request Types, Settings (highlighted), SHORTCUTS.
- Central Content Area: Home > Service Request > Configurations > Settings. The "SETTINGS" table shows one row with Action (edit icon), Business Unit (Banajara Hills), Department (No department), Applicability (Business Unit wise), Category (General admin), Attachment (No), and Description.
- Bottom Content Area: Home > Service Request > Configurations > Settings. The form includes fields for Business Unit (Banajara Hills), Applicability (Business unit wise selected), Category (General Admin), No. of Approvers (2), Approver 1 (Select Approver 1 dropdown), Approver 2 (Management Emp dropdown), Attachment (Yes/No), Description (text area), Executors (dropdown), Request Viewers (dropdown), and a large "UPDATE" button.

Figure 62

## How to Delete Service Request:

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

Refer to Figure 63



The screenshot shows the Sentrifugo application interface. At the top, there is a navigation bar with various icons and links: Dashboard, Manage Modules, Site Configuration, Organization, Human Resource, Resource Requisition, Employee Self Service, Background Checks, Service Request (highlighted with a red box), Performance Appraisal (with a 'BETA' badge), and Analytics. Below the navigation bar is a left sidebar with sections: Configurations (Categories, Request Types, Settings - highlighted with a red box), and SHORTCUTS. The main content area shows a breadcrumb path: Home > Service Request > Configurations > Settings. The main table has columns: Action, Business Unit, Department, Applicability, Category, Attachment, and Description. One row is visible: Action (eye icon, edit icon, delete icon - highlighted with a red box), Business Unit (Banjara Hills), Department (No department), Applicability (Business Unit wise), Category (General admin), Attachment (No), and Description (empty). At the bottom of the table are 'C P' buttons and a 'Records per page' dropdown set to 20.

Figure 63

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

Refer to Figure 64

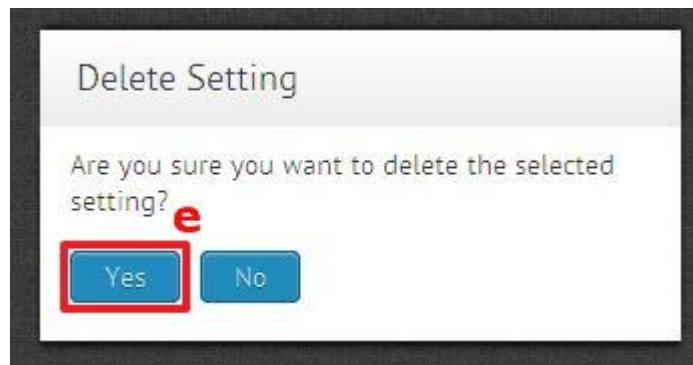


Figure 64

## How do I set Cron Jobs:

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

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

Refer Figure 65

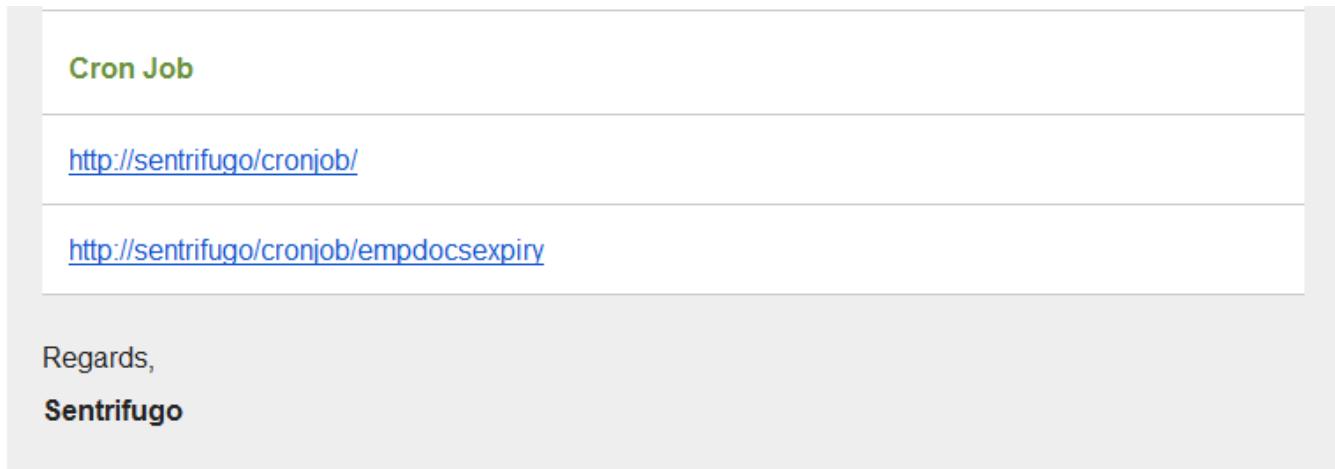
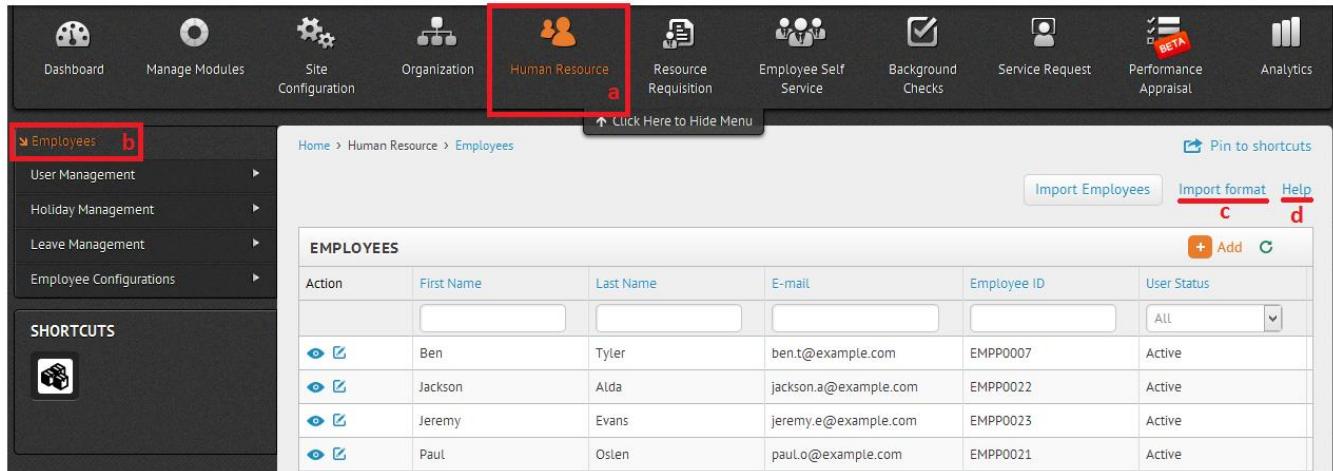


Figure 65

## How to Download Import Format

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

Refer to figure 66



The screenshot shows the Sentrifugo HRMS interface. At the top, there's a dark header bar with various icons and links: Dashboard, Manage Modules, Site Configuration, Organization, Human Resource (which is highlighted with a red box 'a'), Resource Requisition, Employee Self Service, Background Checks, Service Request, Performance Appraisal (with a 'BETA' badge), and Analytics. Below the header is a left sidebar with sections like User Management, Holiday Management, Leave Management, Employee Configurations, and a SHORTCUTS section with a dice icon. The main content area shows a breadcrumb path: Home > Human Resource > Employees. It has a 'Click Here to Hide Menu' button. On the right, there are buttons for Import Employees, Import format (highlighted with a red box 'c'), and Help (highlighted with a red box 'd'). The main table is titled 'EMPLOYEES' and lists four employees: Ben, Jackson, Jeremy, and Paul, with columns for Action, First Name, Last Name, E-mail, Employee ID, and User Status.

Figure 66

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

Refer Figure 67 for the import format



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	
1	Prefix	First Name	Last Name	Role Type	Email	Business Unit	Department	Reporting manager employee ID	Job Title	Position	Employment Status	Date of joining	Date of leaving	Experience	Extension	Work telephone number	Fax	Salary	Currency	Pay Frequency	Salary
2	Mr	John	Henry	Manager	john.henry@example.com	DB	IT	EM02	MGR	PER	Active	20-12-2012									
3	Mrs	Tere	Wilson	Employee	tere.wilson@example.com	SA	ACC	EM03	SE	PROB		20-12-2013									
4																					
5																					
6																					
7																					
8																					
9																					
10																					
11																					
12																					
13																					
14																					

Figure 67

## From where do I pick the Import format details

a. Prefix

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

Refer Figure 68

The screenshot shows the Site Configuration page with several UI elements:

- Header:** A navigation bar with icons and labels: Dashboard, Manage Modules, Site Configuration (highlighted with a red box), Organization, Human Resource, Resource Requisition, Employee Self Service, Background Checks, Service Request, Performance Appraisal, and Analytics.
- Left Sidebar:** A tree view titled "Site Preferences" with nodes: General (highlighted with a red box), Ethnic Codes, Identity Codes, Gender, Time Zones, Marital Status, and Prefixes (highlighted with a red box).
- Main Content:** The "General > Prefixes" page. It includes a breadcrumb trail: Home > Site Configuration > General > Prefixes. A tooltip says "Click Here to Hide Menu". On the right, there are "Pin to shortcuts" and "Add" buttons (highlighted with a red box). The table lists prefixes:

Action	Prefix	Description
	Ms	Commonly used English Honorific
	Mr	Commonly used English Honorific

- Bottom Navigation:** Includes a search bar and a "Records per page" dropdown set to 20, along with a "Print" icon.

Figure 68

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

b. Enter the First and Last Name of the employee

- I. These fields are mandatory and accept only alphabetic characters

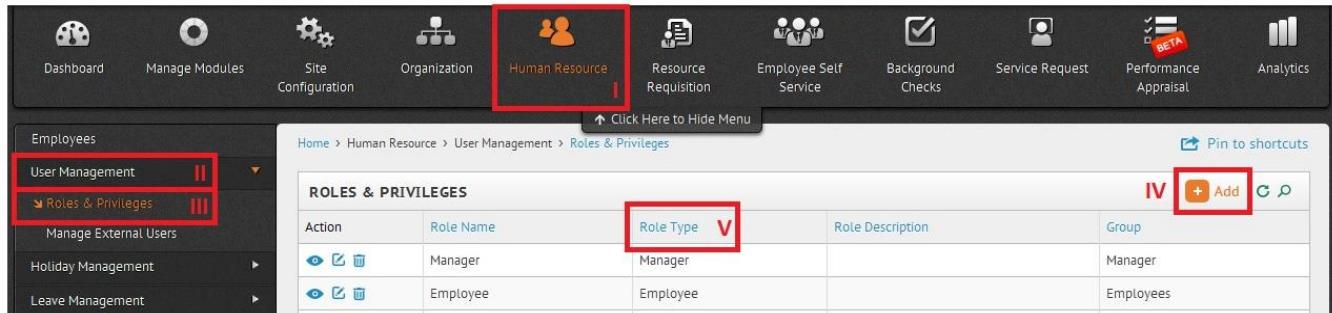
Refer Figure 69

Figure 69

### c. Role Type

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

Refer Figure 70



Action	Role Name	Role Type	Role Description	Group
	Manager	Manager		Manager
	Employee	Employee		Employees

Figure 70

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

### d. Enter the email of the employee

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

Refer figure 71

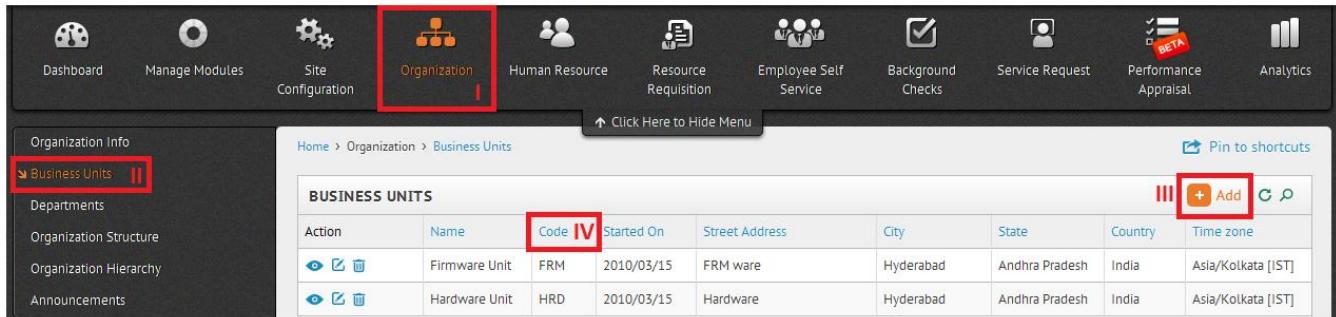
C	D	E
ne	Role	Email
		Business Unit

Figure 71

### e. Business Unit

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

Refer Figure 72



BUSINESS UNITS							
Action	Name	Code	Started On	Street Address	City	State	Country
	Firmware Unit	FRM	2010/03/15	FRM ware	Hyderabad	Andhra Pradesh	India
	Hardware Unit	HRD	2010/03/15	Hardware	Hyderabad	Andhra Pradesh	India

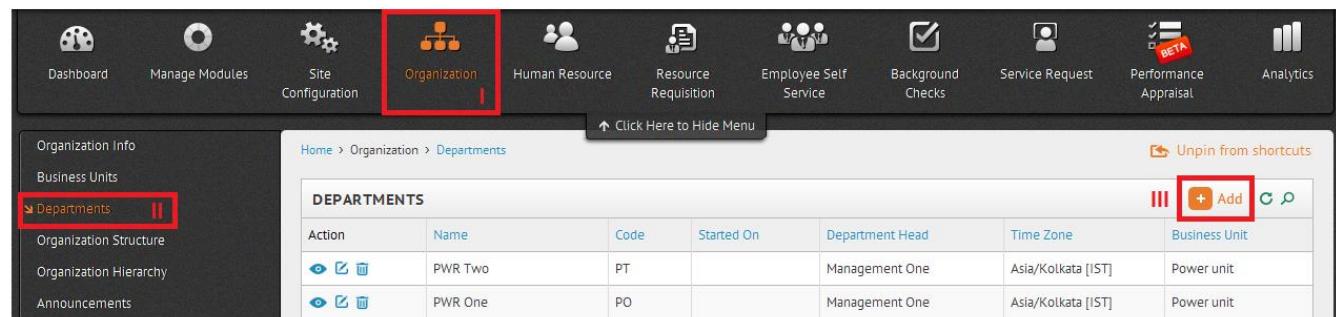
Figure 72

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

### f. Departments

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

Refer Figure 73



DEPARTMENTS						
Action	Name	Code	Started On	Department Head	Time Zone	Business Unit
	PWR Two	PT		Management One	Asia/Kolkata [IST]	Power unit
	PWR One	PO		Management One	Asia/Kolkata [IST]	Power unit

Figure 73

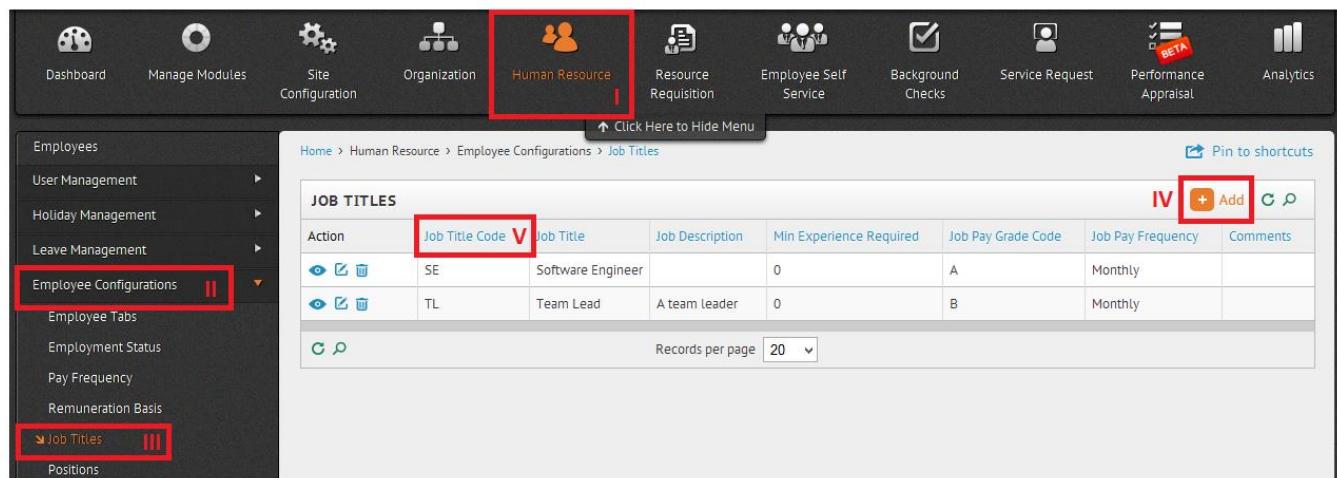
Note: You can only enter departments that are existing in the application

**g. Enter the Reporting Manager employee id**

**h. Job Title**

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

Refer Figure 74



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Manage Modules, Site Configuration, Organization, Human Resource (which is highlighted with a red box), Resource Requisition, Employee Self Service, Background Checks, Service Request, Performance Appraisal (with a 'BETA' badge), and Analytics. The left sidebar has sections for Employees, User Management, Holiday Management, Leave Management, and Employee Configurations (which is also highlighted with a red box). Under Employee Configurations, there are links for Employee Tabs, Employment Status, Pay Frequency, Remuneration Basis, Job Titles (which is highlighted with a red box), and Positions. The main content area displays a grid titled 'JOB TITLES' with columns for Action, Job Title Code (which is highlighted with a red box), Job Title, Job Description, Min Experience Required, Job Pay Grade Code, Job Pay Frequency, and Comments. Two rows are shown: one for 'SE' (Software Engineer) and another for 'TL' (Team Lead). At the bottom of the grid, there are buttons for 'C' (Create) and 'P' (Print), and a dropdown for 'Records per page' set to 20. A red box labeled 'IV' is placed over the 'Add' button in the top right corner of the grid.

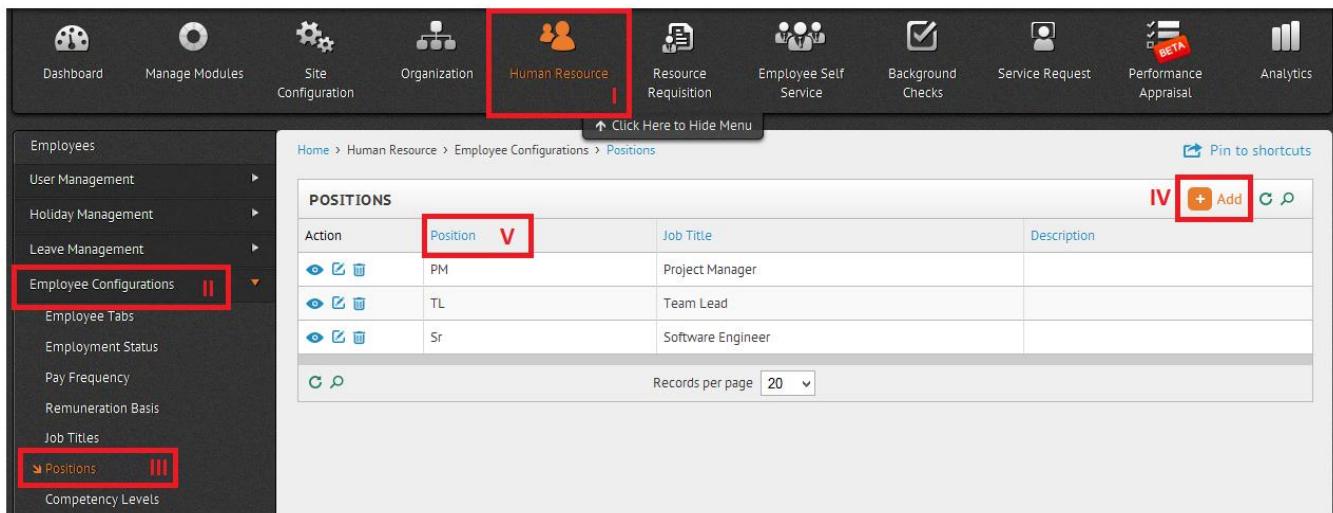
Figure 74

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

### i. Position

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

Refer Figure 75



Action	Position	Job Title	Description
	PM	Project Manager	
	TL	Team Lead	
	Sr	Software Engineer	

Figure 75

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

**j. Employment Status**

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

Refer Figure 76

The screenshot shows the Human Resource module's main navigation bar with various icons and links: Dashboard, Manage Modules, Site Configuration, Organization, Human Resource (selected), Resource Requisition, Employee Self Service, Background Checks, Service Request, Performance Appraisal, and Analytics. A red box highlights the 'Human Resource' icon. Below the navigation bar, a left sidebar lists 'Employees', 'User Management', 'Holiday Management', 'Leave Management', 'Employee Configurations' (selected), 'Employee Tabs', and 'Employment Status'. The main content area shows a breadcrumb path: Home > Human Resource > Employee Configurations > Employment Status. It features a 'EMPLOYMENT STATUS' table with columns: Action, Work Code, Work Short Code, and Description. The table contains four rows: Temporary (Temp), Part Time (PT), Full Time (FT), and Contract (C). A red box highlights the 'Work Short Code' column header. A red box also highlights the 'Add' button in the top right corner of the table. A callout bubble points to the 'Click Here to Hide Menu' link.

Figure 76

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

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

- I. This is a mandatory field

Refer Figure 77 for guidance

Figure 77

**I. Enter the employee Date of Leaving**

- I. Date of Leaving column can be left empty unless the employee Employment status is "Left", "Suspended", or "Resigned"
- II. Date of Leaving must be greater than the Date of Joining

Refer Figure 78

K	L	M
Date of joining	<b>Date of leaving</b>	Experience

Figure 78

**m. Enter the employee Experience**

- I. This field is not mandatory

Refer Figure 79

L	M	N
Date of leaving	<b>Experience</b>	Extension

Figure 79

n. Enter the employee Extension

- I. This field is not mandatory

Refer Figure 80

M	N
xperience	Extension

Figure 80

**o. Enter the employee Work Telephone Number**

- I. This field is not mandatory

Refer Figure 81

Figure 81

**p. Enter the employee Fax**

- This field is not mandatory

Refer Figure 82

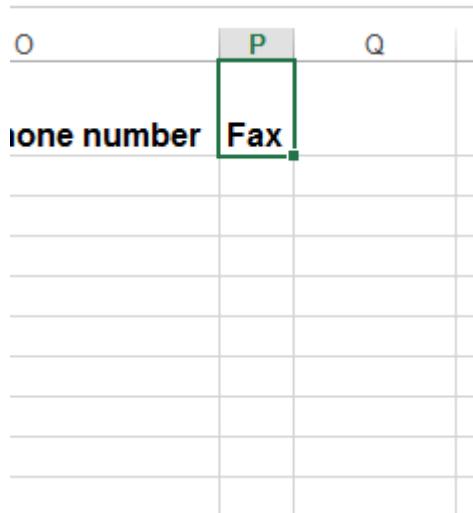
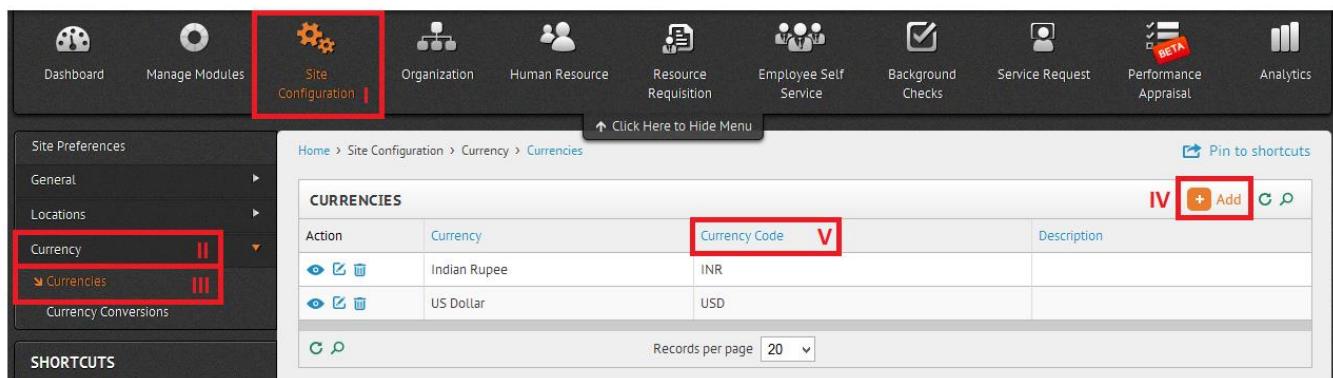


Figure 82

**q. Salary Currency**

- Click on Site Configurations in the top menu
- Click on Currency in the left side panel
- Click on Currencies
- Click on Add button to add the desired status
- Use the Currency Code to enter in the import excel

Refer Figure 83



Action	Currency	Currency Code	Description
[Edit, Delete]	Indian Rupee	INR	
[Edit, Delete]	US Dollar	USD	

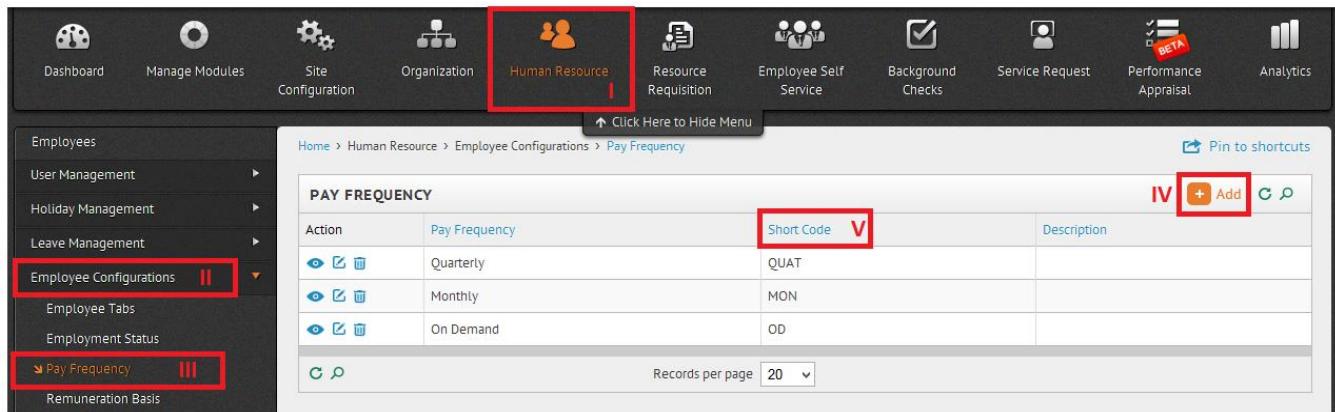
Figure 83

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

### r. Pay Frequency

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

Refer Figure 84



Action	Pay Frequency	Short Code	Description
	Quarterly	QUAT	
	Monthly	MON	
	On Demand	OD	

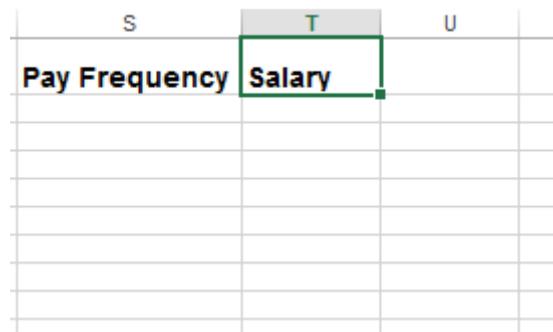
Figure 84

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

### s. Enter the employee Salary

- I. This field is not mandatory

Refer Figure 85



S	T	U
Pay Frequency	Salary	

Figure 85

## Performance Appraisal

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

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

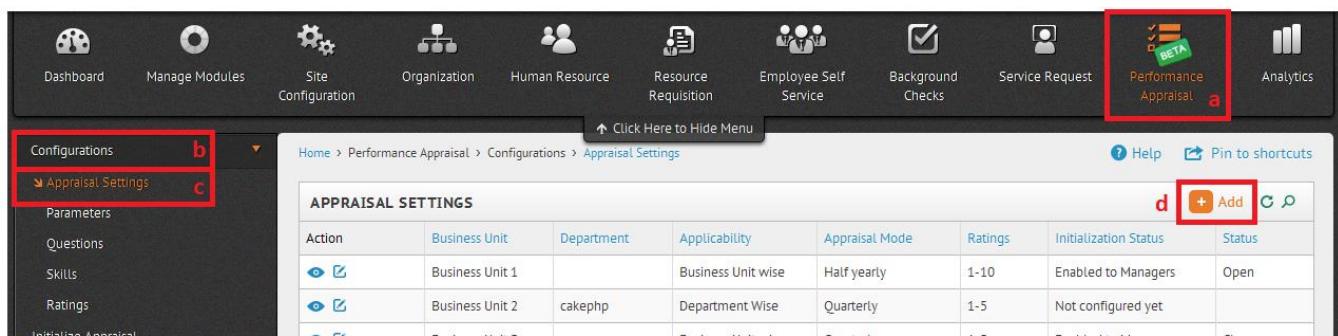
To configure the appraisal process, first the appraisal settings for the selected business unit or department must be configured.

## Appraisal Settings

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

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

Refer Figure 86



Action	Business Unit	Department	Applicability	Appraisal Mode	Ratings	Initialization Status	Status
<input type="checkbox"/>	Business Unit 1		Business Unit wise	Half yearly	1-10	Enabled to Managers	Open
<input type="checkbox"/>	Business Unit 2	cakephp	Department Wise	Quarterly	1-5	Not configured yet	

Figure 86

In Add Appraisal Settings screen,

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

Refer Figure 87

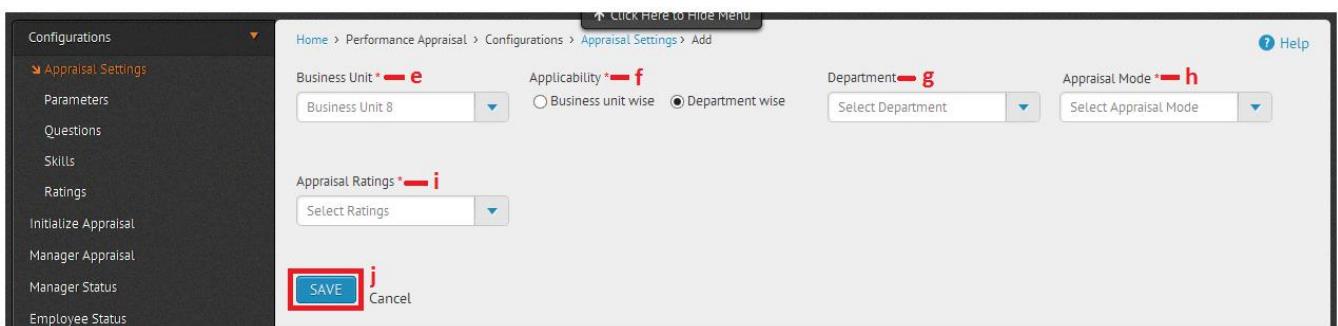


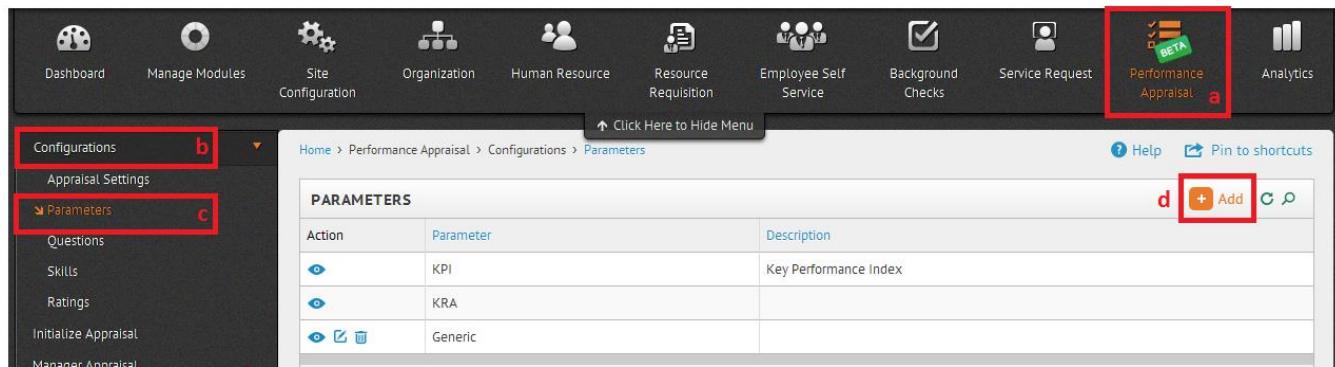
Figure 87

## Parameters

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

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

Refer Figure 88



Action	Parameter	Description
	KPI	Key Performance Index
	KRA	
	Generic	

Figure 88

In the Add Parameters screen,

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

Refer Figure 89

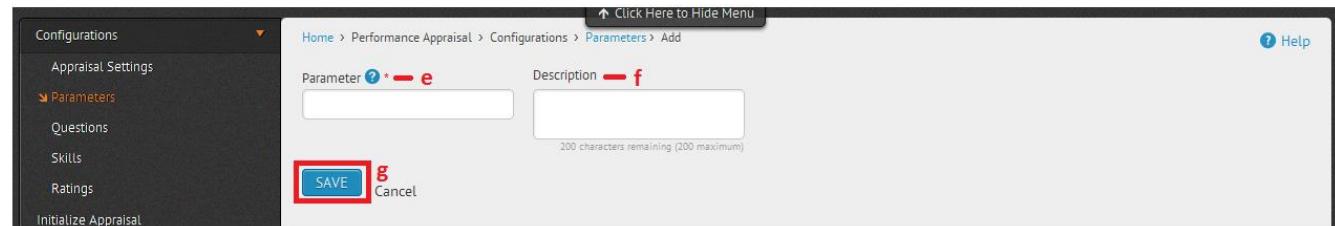


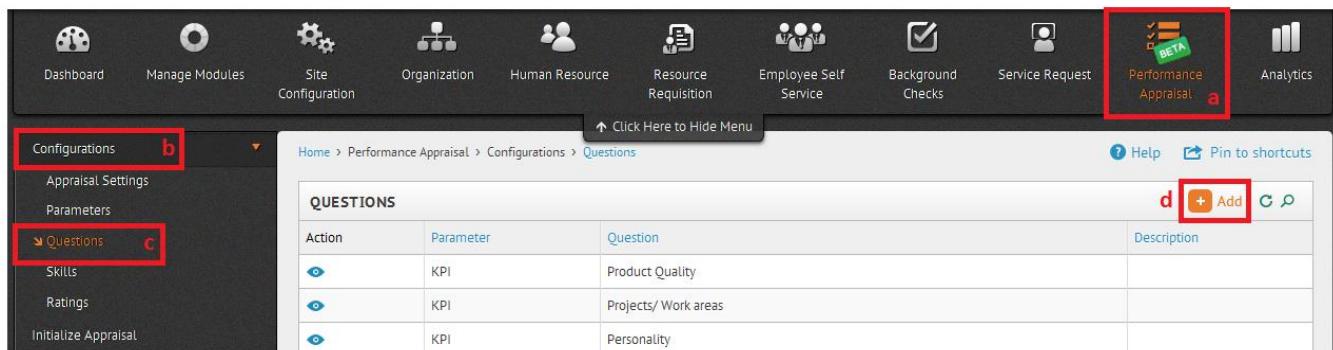
Figure 89

## Questions

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

- Click on Performance Appraisal in the header
- Click on Configurations on the left side panel
- Click on Questions submenu
- Click on Add in the right side panel

Refer Figure 90



Action	Parameter	Question	Description
o	KPI	Product Quality	
o	KPI	Projects/ Work areas	
o	KPI	Personality	

Figure 90

In the Add Questions screen,

- Select an option from the parameters dropdown
- Add other parameter by clicking Add Parameter
- Enter the question
- Provide description if necessary
- Click on “Add New Question” to add questions for the selected parameter
- Click on Save to add questions for the selected parameter

Refer Figure 91

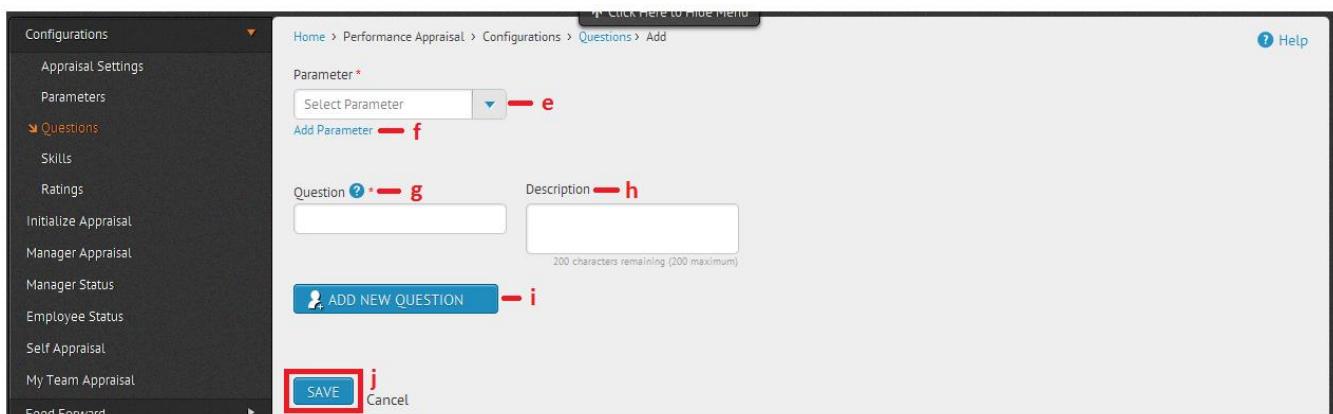


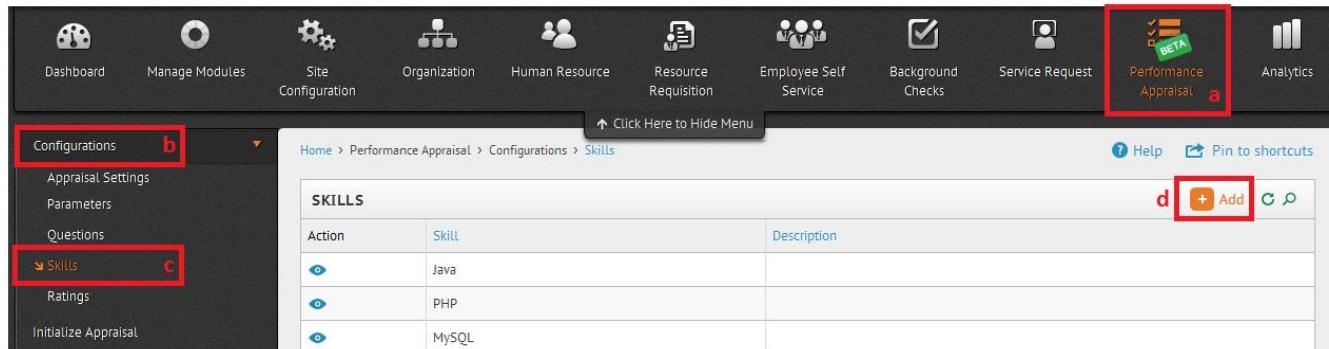
Figure 91

## Skills

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

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

Refer Figure 92



The screenshot shows the Sentrifugo HRMS interface. At the top, there is a navigation bar with various icons and links: Dashboard, Manage Modules, Site Configuration, Organization, Human Resource, Resource Requisition, Employee Self Service, Background Checks, Service Request, Analytics, and Performance Appraisal (which is highlighted with a red box and labeled 'a'). Below the navigation bar is a secondary menu titled 'Configurations' (highlighted with a red box and labeled 'b'). This menu contains options: Appraisal Settings, Parameters, Questions, Skills (highlighted with a red box and labeled 'c'), Ratings, and Initialize Appraisal. The main content area is titled 'SKILLS' and displays a table with three rows:

Action	Skill	Description
○	Java	
○	PHP	
○	MySQL	

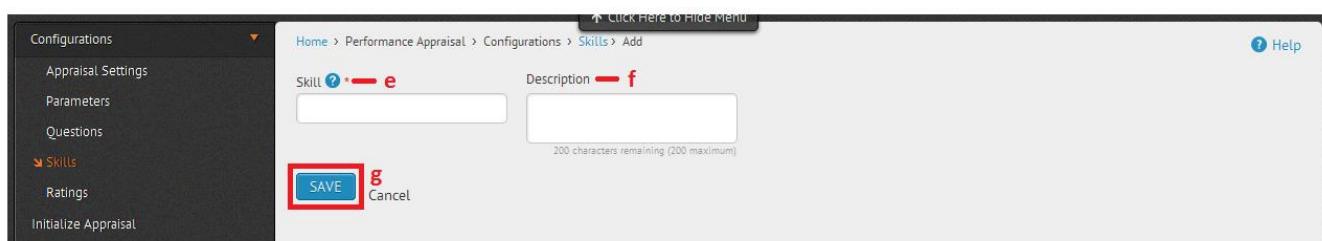
At the top right of the main content area, there are several buttons: Help, Pin to shortcuts, + Add (highlighted with a red box and labeled 'd'), and a search icon.

Figure 92

In the Add Skills screen,

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

Refer Figure 93



This screenshot shows the 'Add Skills' configuration screen. On the left, there is a sidebar with the 'Configurations' section expanded, showing 'Appraisal Settings', 'Parameters', 'Questions', 'Skills' (highlighted with a red box and labeled 'e'), 'Ratings', and 'Initialize Appraisal'. The main area has a title 'Home > Performance Appraisal > Configurations > Skills > Add'. It contains two input fields: 'Skill' (with a required asterisk) and 'Description'. The 'Skill' field is highlighted with a red box and labeled 'e'. The 'Description' field has a note '200 characters remaining (200 maximum)' and is highlighted with a red box and labeled 'f'. At the bottom, there are two buttons: 'SAVE' (highlighted with a red box and labeled 'g') and 'Cancel'.

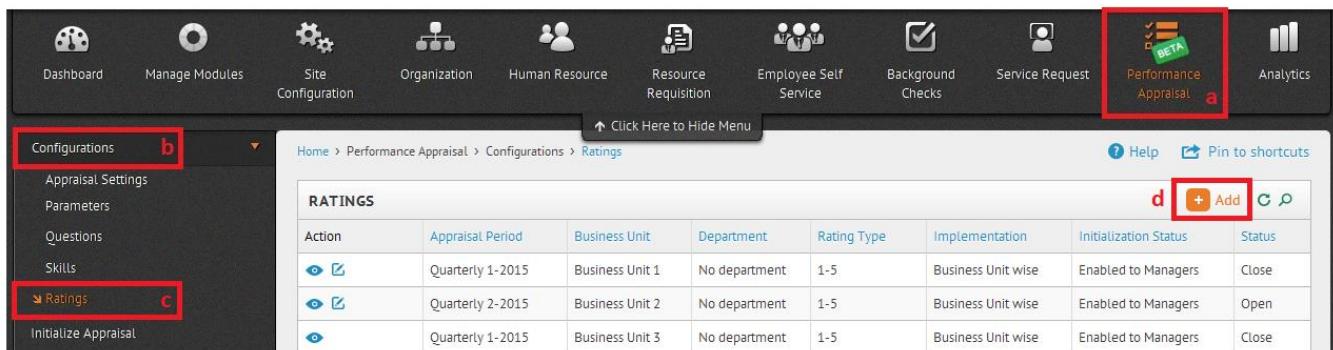
Figure 93

## Ratings

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

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

Refer Figure 94



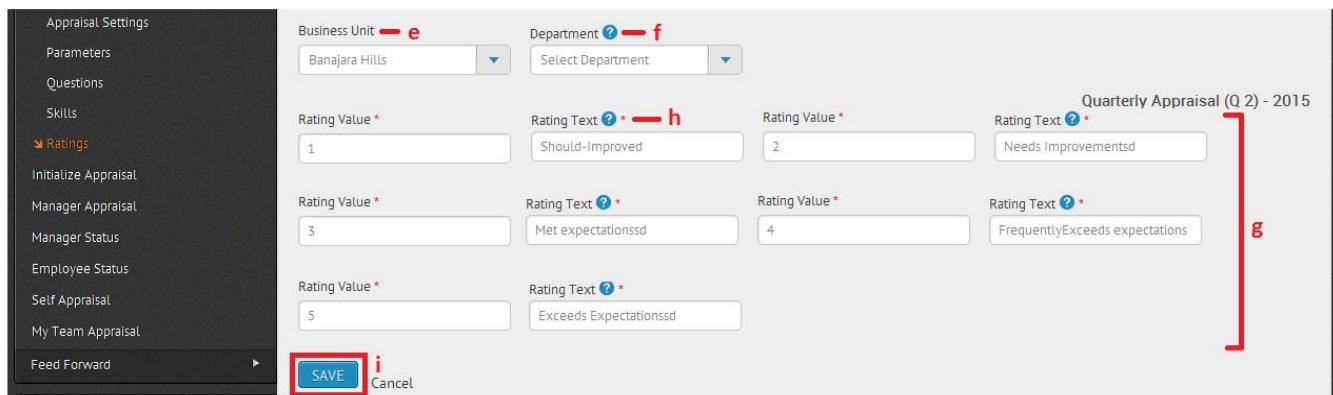
RATINGS							
Action	Appraisal Period	Business Unit	Department	Rating Type	Implementation	Initialization Status	Status
<input type="checkbox"/>	Quarterly 1-2015	Business Unit 1	No department	1-5	Business Unit wise	Enabled to Managers	Close
<input type="checkbox"/>	Quarterly 2-2015	Business Unit 2	No department	1-5	Business Unit wise	Enabled to Managers	Open
<input type="checkbox"/>	Quarterly 1-2015	Business Unit 3	No department	1-5	Business Unit wise	Enabled to Managers	Close

Figure 94

In the Add ratings screen,

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

Refer Figure 95



Rating Value *	Rating Text ? * — h	Rating Value *	Rating Text ? *
1	Should-Improved	2	Needs Improvementsd
Rating Value *	Rating Text ? *	Rating Value *	Rating Text ? *
3	Met expectationssd	4	FrequentlyExceeds expectations
Rating Value *	Rating Text ? *		
5	Exceeds Expectationssd		

Figure 95

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

## Initialize Appraisal

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

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

Refer Figure 96



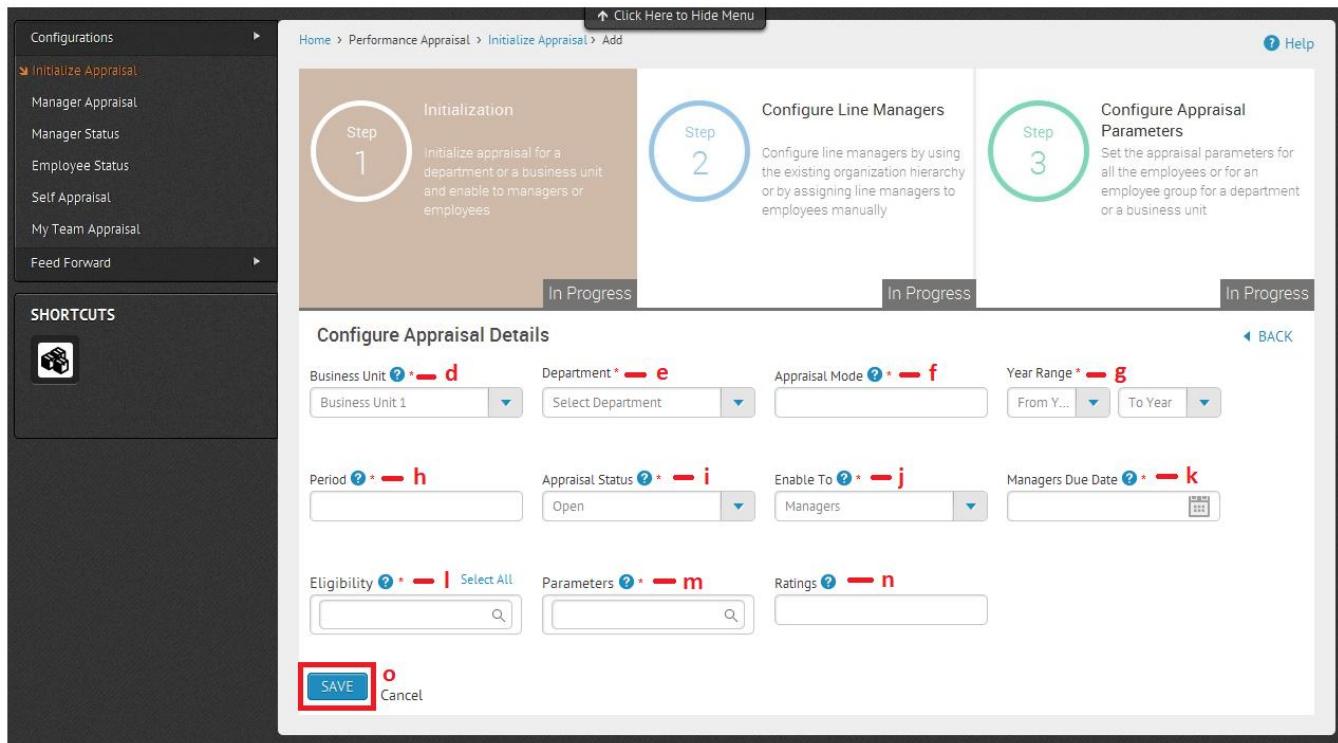
Action	Business Unit	Department	Financial Year	Mode	Period	Status	Process Status
<input checked="" type="checkbox"/>	Business Unit 1		2015-2016	Half yearly	H1	Open	Enabled to Managers
<input checked="" type="checkbox"/>	Business Unit 2		2015-2016	Quarterly	Q2	Open	Enabled to Managers

Figure 96

In the Add Initialize Appraisal screen,

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

Refer Figure 97



The screenshot shows the 'Initialize Appraisal' screen in the Sentrifugo application. The interface is divided into several sections:

- Left Sidebar:** Contains a 'Configurations' menu with options like 'Manager Appraisal', 'Manager Status', 'Employee Status', 'Self Appraisal', 'My Team Appraisal', and 'Feed Forward'. Below it is a 'SHORTCUTS' section with a cube icon.
- Header:** Shows the current location: Home > Performance Appraisal > Initialize Appraisal > Add. There is also a 'Click Here to Hide Menu' link and a 'Help' button.
- Main Content:**
  - Step 1 Initialization:** Describes initializing appraisal for a department or business unit and enabling it for managers or employees. It is currently in progress.
  - Step 2 Configure Line Managers:** Describes configuring line managers using organization hierarchy or manual assignment. It is currently in progress.
  - Step 3 Configure Appraisal Parameters:** Describes setting appraisal parameters for all employees or an employee group for a department or business unit. It is currently in progress.
- Configure Appraisal Details Form:** This is the active step. It includes the following fields:
  - Business Unit \* — d: A dropdown menu showing 'Business Unit 1'.
  - Department \* — e: A dropdown menu showing 'Select Department'.
  - Appraisal Mode \* — f: A dropdown menu showing 'Open'.
  - Year Range \* — g: Two dropdown menus for 'From Year...' and 'To Year...'.
  - Period \* — h: A dropdown menu.
  - Appraisal Status \* — i: A dropdown menu showing 'Open'.
  - Enable To \* — j: A dropdown menu showing 'Managers'.
  - Managers Due Date \* — k: A date picker.
  - Eligibility \* — l: A search bar.
  - Parameters \* — m: A search bar.
  - Ratings \* — n: A search bar.
- Buttons:** At the bottom left is a large blue 'SAVE' button with a red border. To its right are 'Cancel' and 'O' buttons.

Figure 97

## Configure Line Managers

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

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

1. Choose by Organization Hierarchy
  - Establish appraisal process as per the organization hierarchy where line manager will be same as the reporting manager
  - Define the number of appraisal levels and assign line managers to the employees
  - Save the configuration to apply to the selected department or business unit
  
- a. Click on Choose by Organization Hierarchy
- b. Click Yes in the Confirmation alert box

Refer Figure 98

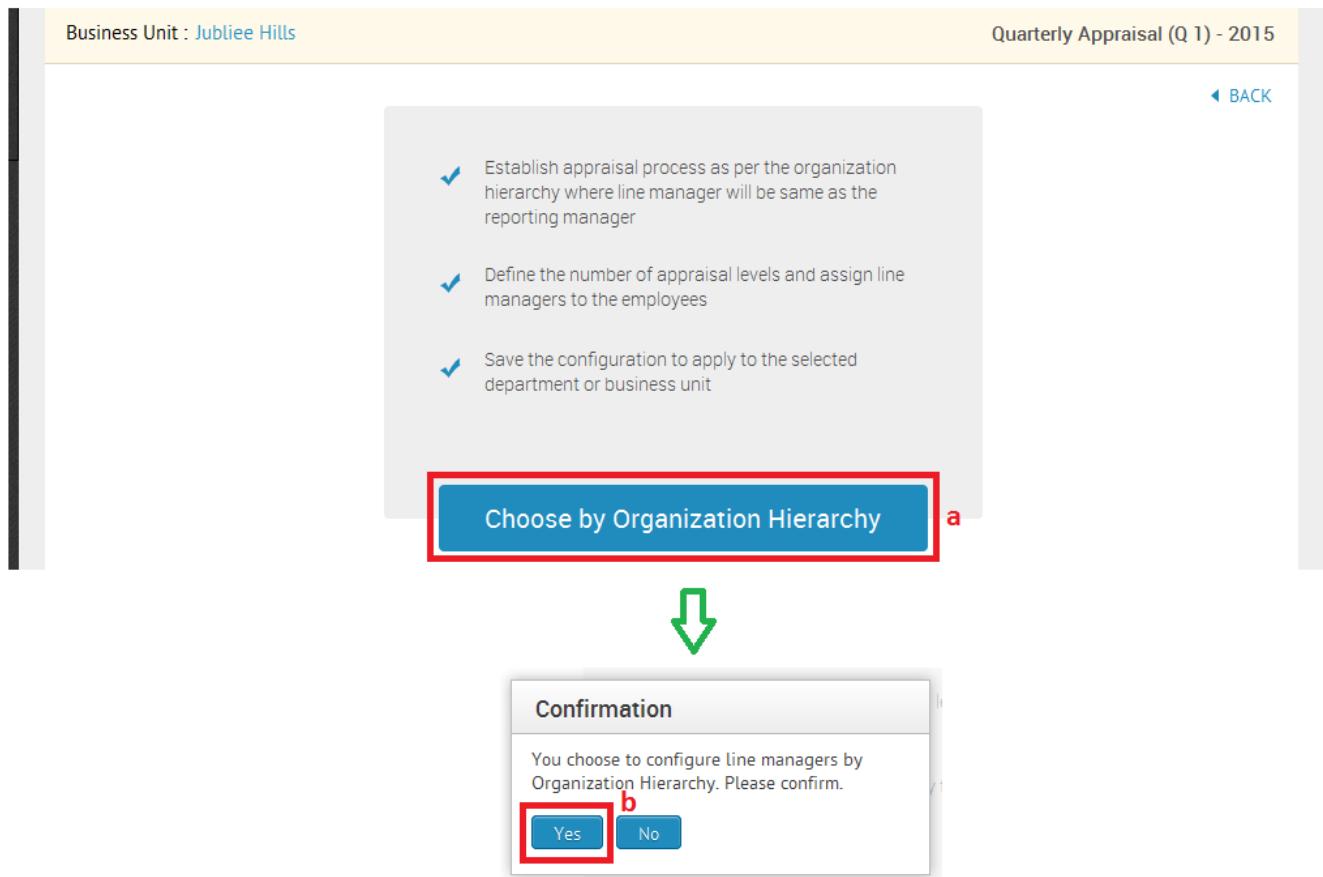
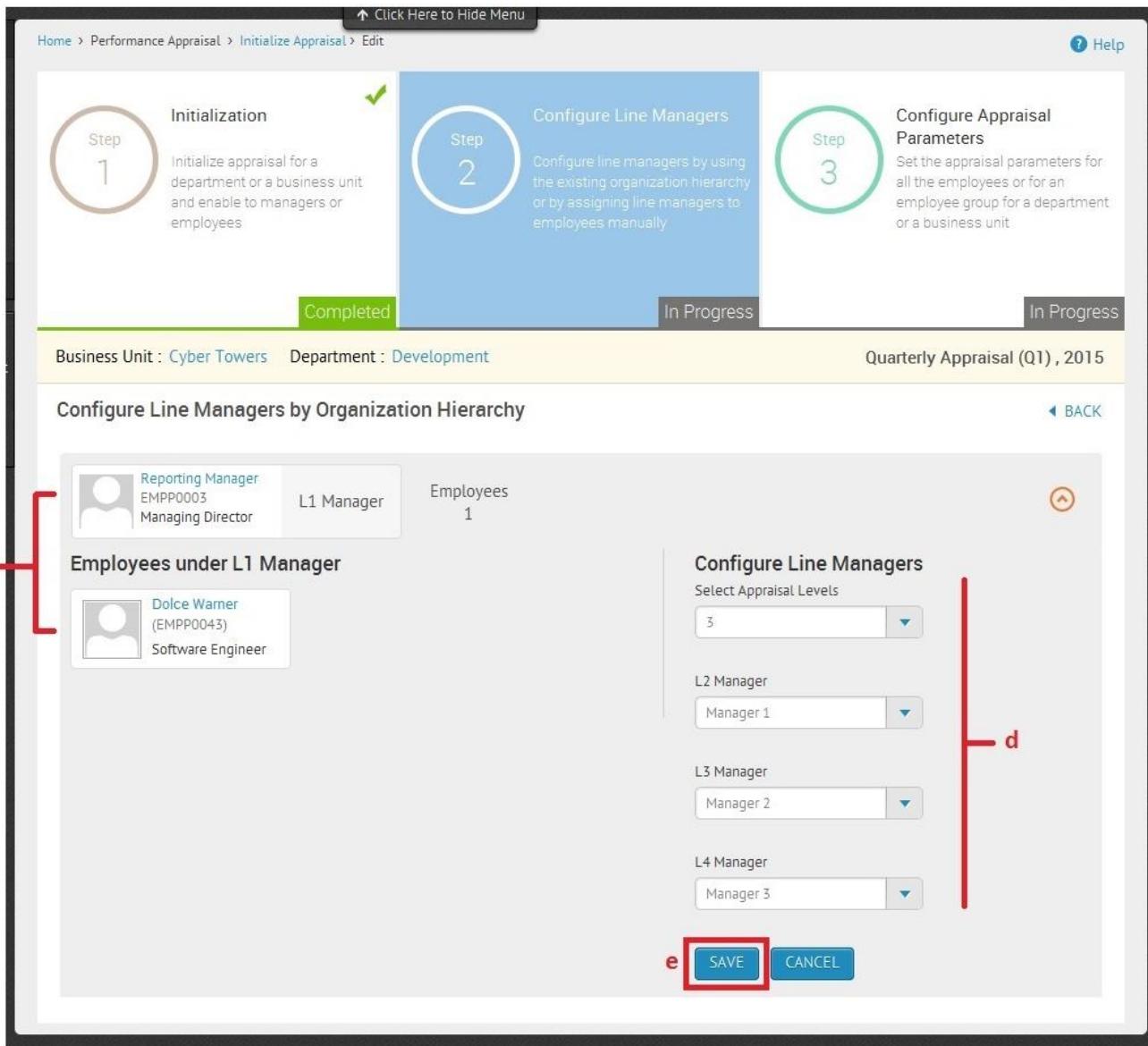


Figure 98

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

Refer Figure 99



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

- Step 1 Initialization:** Completed. Description: Initialize appraisal for a department or a business unit and enable to managers or employees.
- Step 2 Configure Line Managers:** In Progress. Description: Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually.
- Step 3 Configure Appraisal Parameters:** In Progress. Description: Set the appraisal parameters for all the employees or for an employee group for a department or a business unit.

Below the steps, it shows the current configuration details:

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

The main content area is titled "Configure Line Managers by Organization Hierarchy". It displays the following information:

- L1 Manager:** Reporting Manager EMPP0003 Managing Director
- Employees:** 1
- Employees under L1 Manager:** Dolce Warner (EMPP0043) Software Engineer

To the right, the "Configure Line Managers" panel is open, showing the following configuration:

- Select Appraisal Levels: 3
- L2 Manager: Manager 1
- L3 Manager: Manager 2
- L4 Manager: Manager 3

At the bottom of the panel are two buttons: **SAVE** and **CANCEL**. The **SAVE** button is highlighted with a red box.

Figure 99

2. Assign Line Managers to Employees
  - Define the number of appraisal levels
  - Determine the line managers as per the selected appraisal levels
  - Add or remove employees based on the selected line managers

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

Refer Figure 100

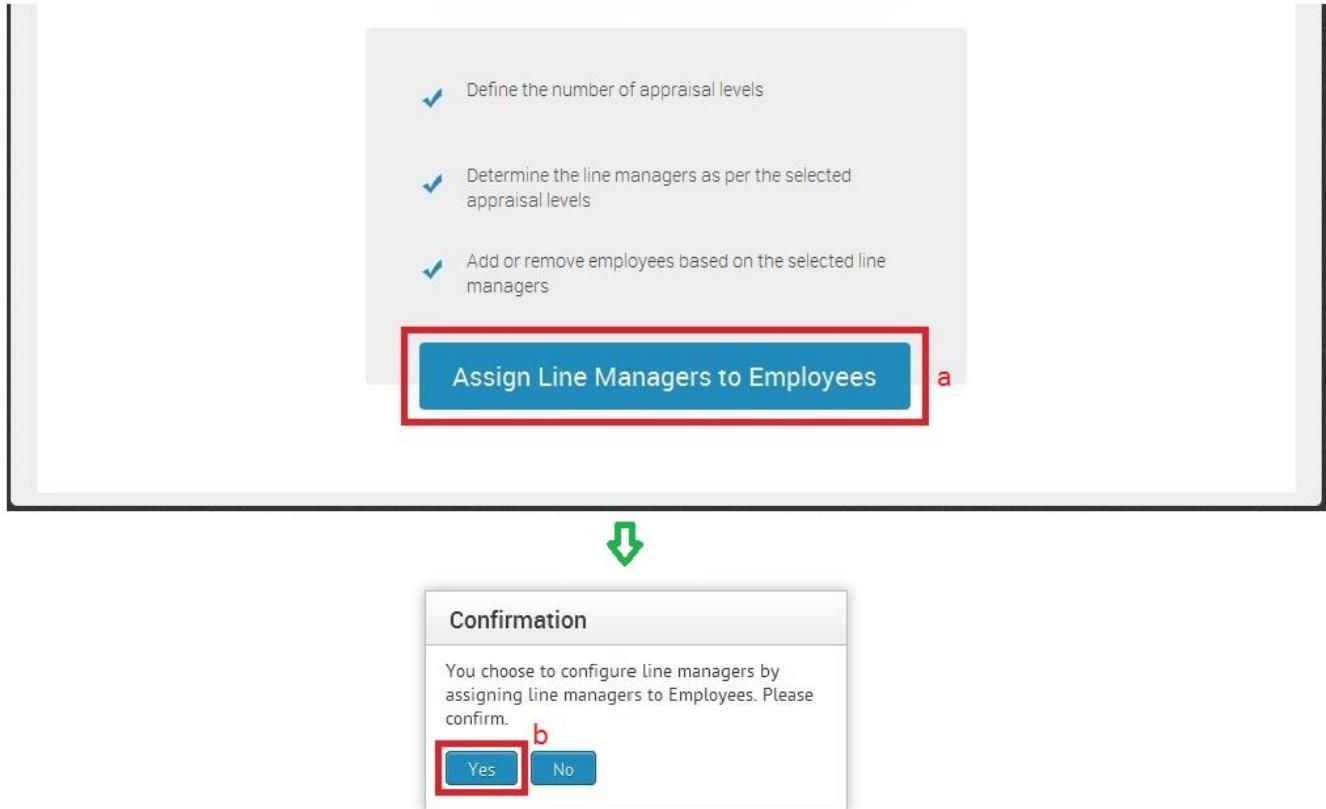


Figure 100

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

Refer Figure 101

↑ Click Here to Hide Menu

Home > Performance Appraisal > Initialize Appraisal > Edit ? Help

Step 1
Initialization
Completed

Step 2
Configure Line Managers
In Progress

Step 3
Configure Appraisal Parameters
In Progress

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

Configure Line Managers ◀ BACK

+Add Managers — c

Select Appraisal Levels  
2 — d

L1 Manager L2 Manager  
Manager 1 Manager 2 — e

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

Employees (Click on an employee to remove)  
Search Employee — g

Dolce Warner EMPP0043 Software Engineer — f

Jack Allen EMPP0045 Software Engineer — g

SAVE — h Cancel

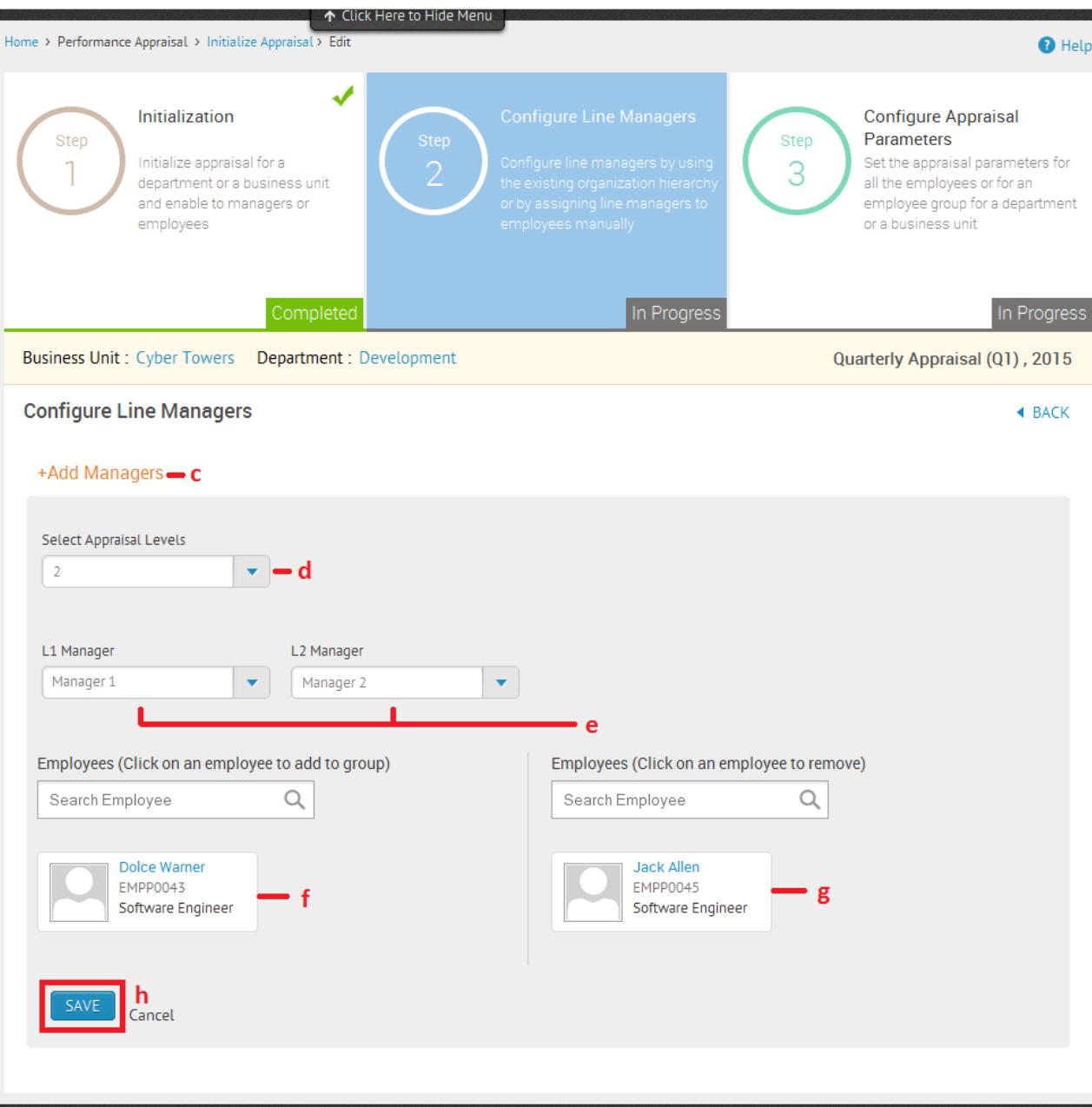


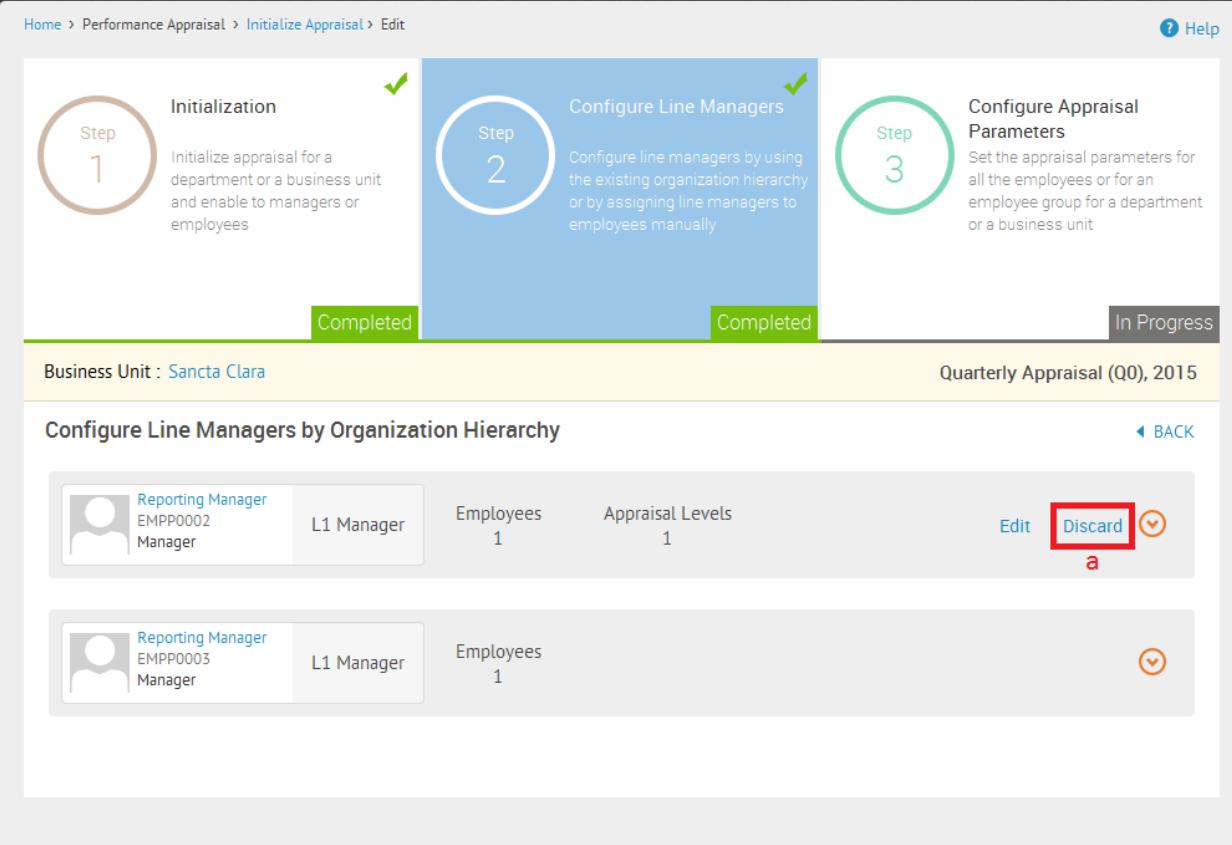
Figure 101

## Discard Line Manager Configuration

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

- Click on Discard to discard the line manager configurations

Refer Figure 102



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

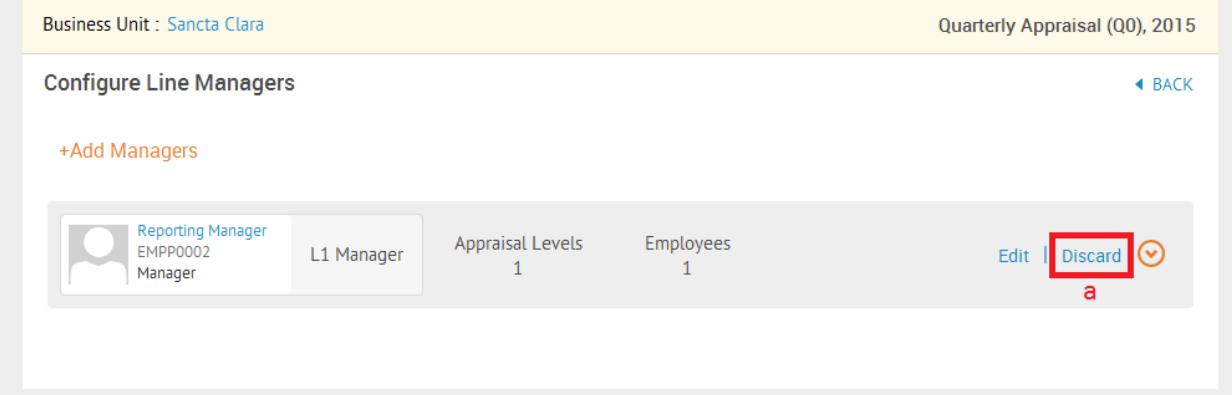
- Step 1 Initialization:** Initialize appraisal for a department or a business unit and enable to managers or employees. Status: Completed.
- Step 2 Configure Line Managers:** Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually. Status: Completed.
- Step 3 Configure Appraisal Parameters:** Set the appraisal parameters for all the employees or for an employee group for a department or a business unit. Status: In Progress.

Below the steps, it says "Business Unit : Sancta Clara" and "Quarterly Appraisal (Q0), 2015".

In the "Configure Line Managers by Organization Hierarchy" section, there are two reporting managers listed:

- Reporting Manager EMPP0002 Manager (L1 Manager) - Employees 1, Appraisal Levels 1. Buttons: Edit, Discard (highlighted with a red box).
- Reporting Manager EMPP0003 Manager (L1 Manager) - Employees 1. Buttons: Edit, Discard (highlighted with a red box).

OR



The screenshot shows the "Configure Line Managers" page 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. Buttons: Edit, Discard (highlighted with a red box).

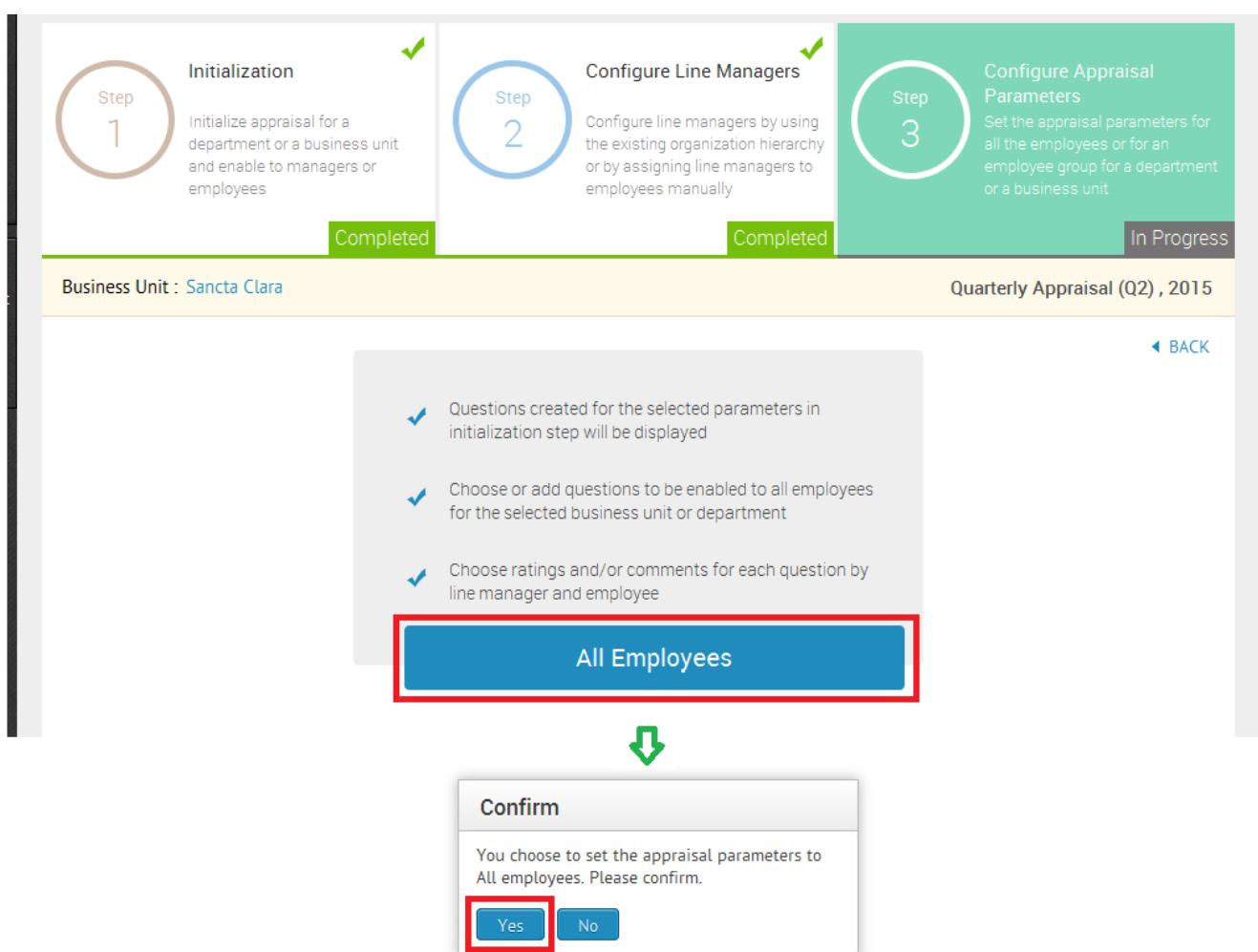
Figure 102

## Configure Appraisal Parameters

Configure the appraisal parameters after configuring the line managers. Here, the appraisal process can be made applicable to employees. This step can be done in two ways:

1. All Employees
  - Questions created for the selected parameters in initialization step will be displayed
  - Choose or add questions to be enabled to all employees for the selected business unit or department
  - Choose ratings and/or comments for each question by line manager and employee
  
- a. Click on Assign Line Managers to Employees
- b. Click Yes in the Confirmation alert box

Refer Figure 103



The screenshot shows a three-step process for appraisal configuration:

- Step 1 Initialization**: Initialize appraisal for a department or a business unit and enable to managers or employees. Status: Completed.
- Step 2 Configure Line Managers**: Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually. Status: Completed.
- Step 3 Configure Appraisal Parameters**: Set the appraisal parameters for all the employees or for an employee group for a department or a business unit. Status: In Progress.

Business Unit: Sancta Clara      Quarterly Appraisal (Q2), 2015

Details for Step 3 (Configure Appraisal Parameters):

- Questions created for the selected parameters in initialization step will be displayed
- Choose or add questions to be enabled to all employees for the selected business unit or department
- Choose ratings and/or comments for each question by line manager and employee

A red box highlights the "All Employees" button, which is being confirmed in a modal dialog:

**Confirm**

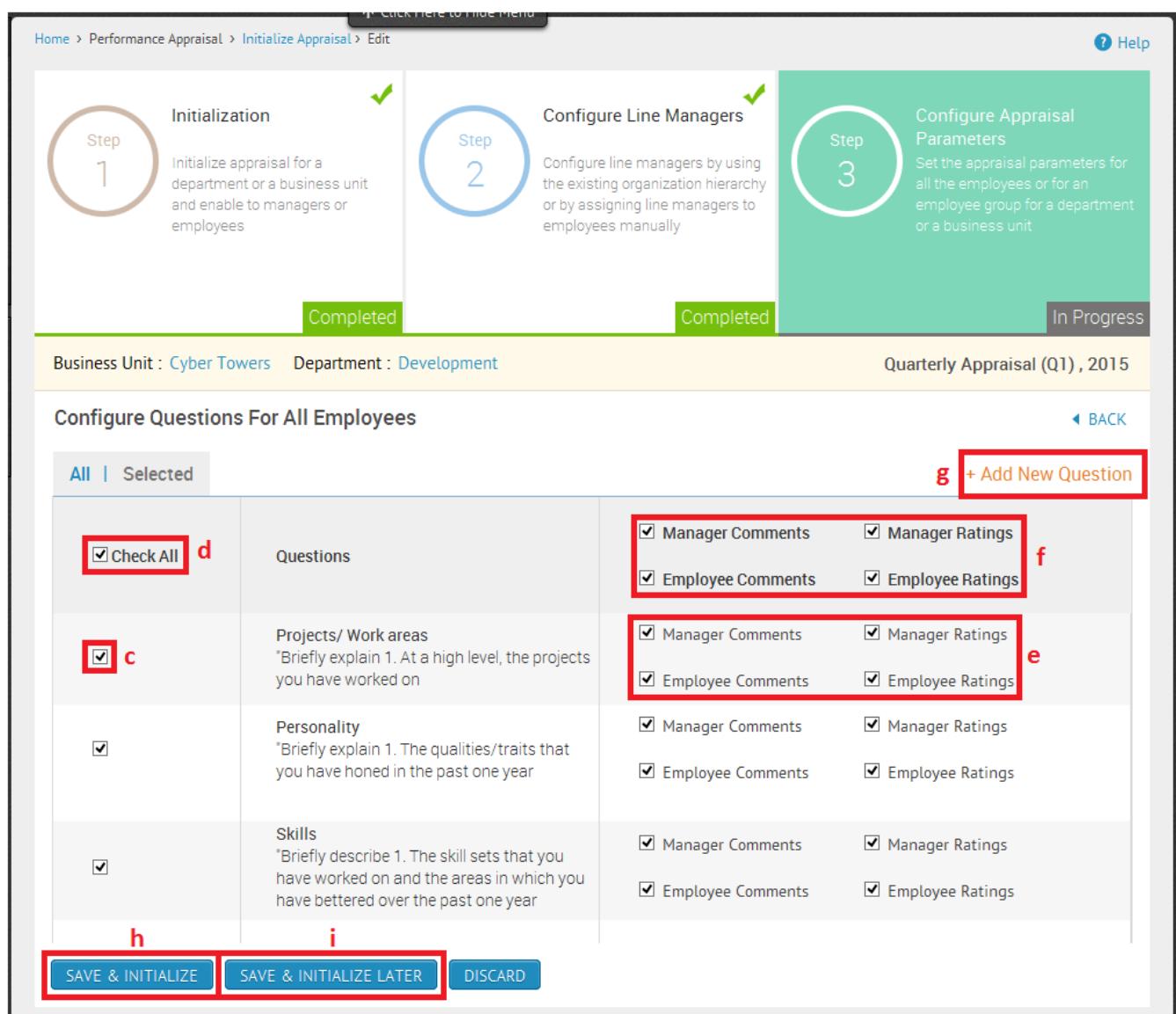
You choose to set the appraisal parameters to All employees. Please confirm.

**Yes** **No**

Figure 103

- c. Select Questions individually by checking the checkbox respective to each question  
Or
- d. Select all the questions by checking the Check All option in the table header
- e. Select ratings or comments of manager or employee individually for all the questions  
Or
- f. Select ratings or comments of manager or employee by checking the Manager Rating, Manager Comments, Employee Ratings and Employee Comments
- g. Click on Add New Question to add more questions to the appraisal process
- h. Click on Save & Initialize to initialize the appraisal
- Or
- i. Click on Save & Initialize Later to only save the appraisal process

Refer Figure 104



The screenshot shows the 'Performance Appraisal > Initialize Appraisal' interface. It displays three steps:

- Step 1 Initialization:** Completed. Description: Initialize appraisal for a department or a business unit and enable to managers or employees.
- Step 2 Configure Line Managers:** Completed. Description: Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually.
- Step 3 Configure Appraisal Parameters:** In Progress. Description: Set the appraisal parameters for all the employees or for an employee group for a department or a business unit.

Below the steps, it shows the Business Unit: Cyber Towers and Department: Development, and the Quarterly Appraisal (Q1), 2015 period.

The main content area is titled 'Configure Questions For All Employees'. It includes a table with columns for Questions, Projects/ Work areas, Personality, and Skills. Each row has checkboxes for Manager and Employee Comments/Ratings. A red box highlights the 'Check All' checkbox in the first row (d). Another red box highlights the '+ Add New Question' button (g). Red boxes also highlight specific checkboxes in the second and third rows (e, f).

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

At the bottom, there are three buttons: **SAVE & INITIALIZE**, **SAVE & INITIALIZE LATER** (both highlighted with a red box), and **DISCARD**.

Figure 104

2. Customized Employee Groups

- Apply appraisal parameters by grouping employees
  - Choose or add questions to be enabled to all employees for the selected business unit or department
  - Choose ratings and/or comments for each question by line manager and employee
- a. Click on Customized Employees Groups
  - b. Click Yes in the Confirmation alert box

Refer Figure 105

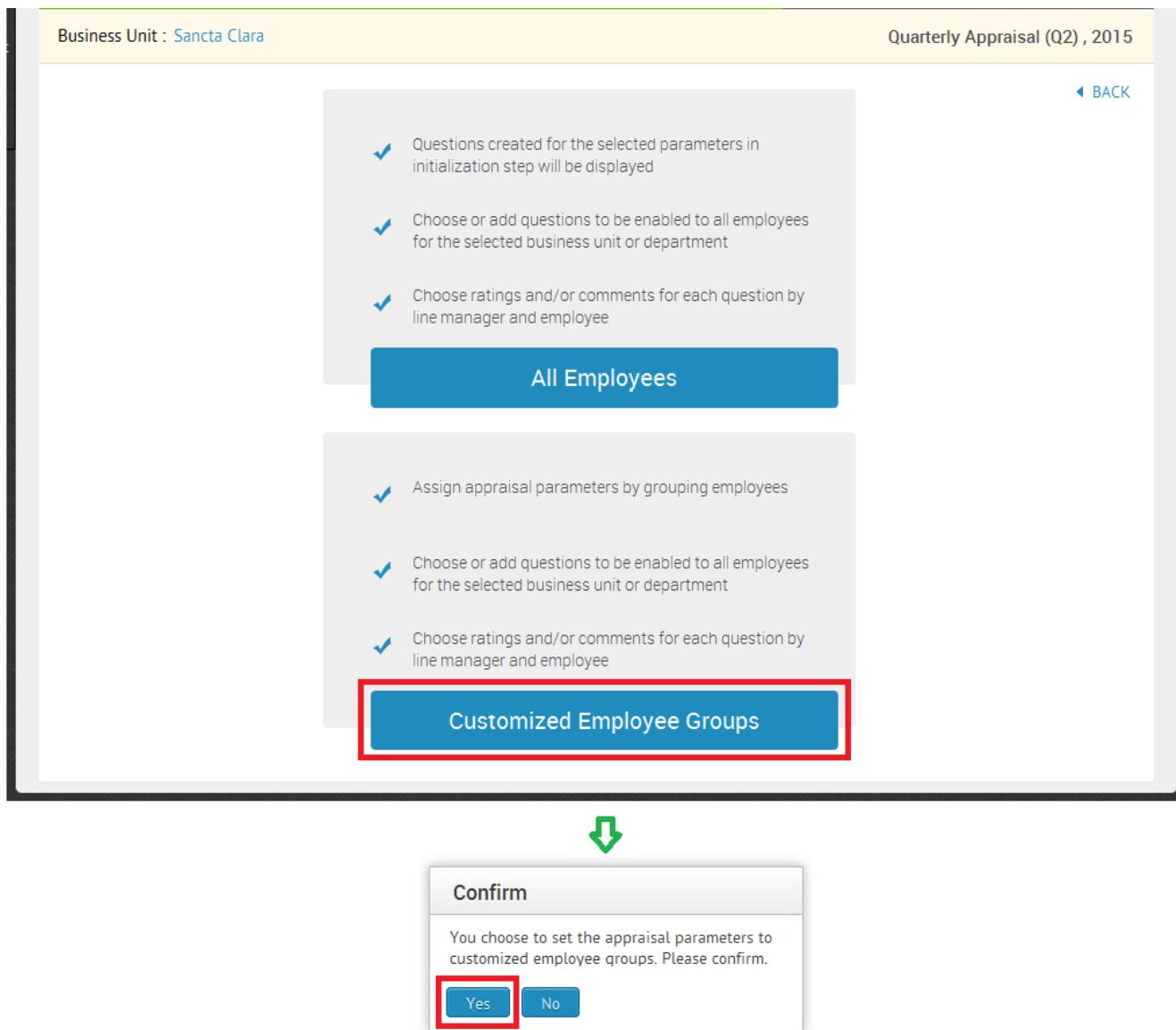


Figure 105

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

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

Refer Figure 106

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

### Customized Employee Groups

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

Group Name \* — d

[◀ BACK](#)

Employees

Search Employee

Dolce Warner  
(EMPP0043)  
Software Engineer

— e

Selected Employees (0)

Search Employee

Add employees to group.

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

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

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

Figure 106

© Sentrifugo 2014 - All Rights Reserved

Page 79 of 95

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

Refer Figure 107

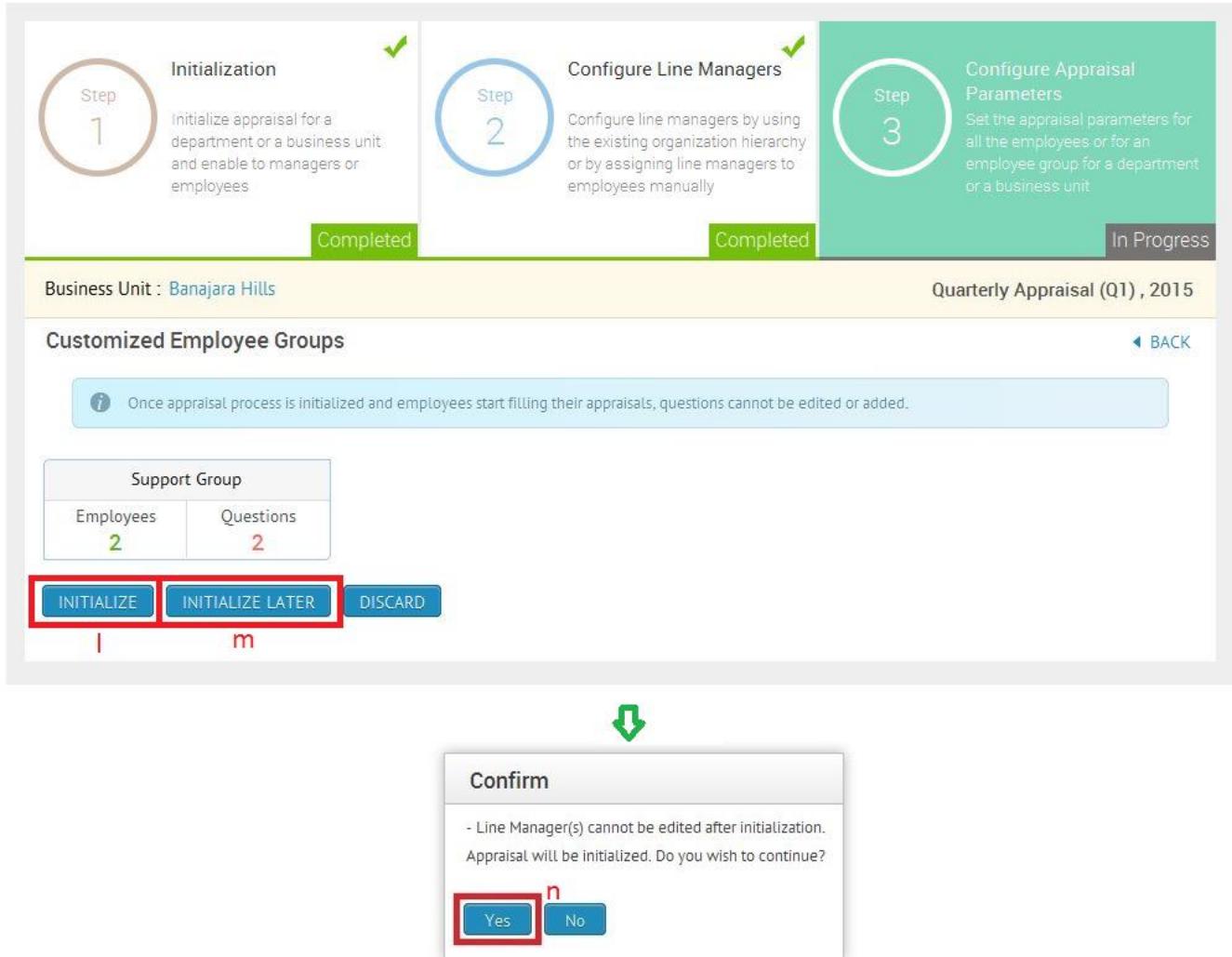


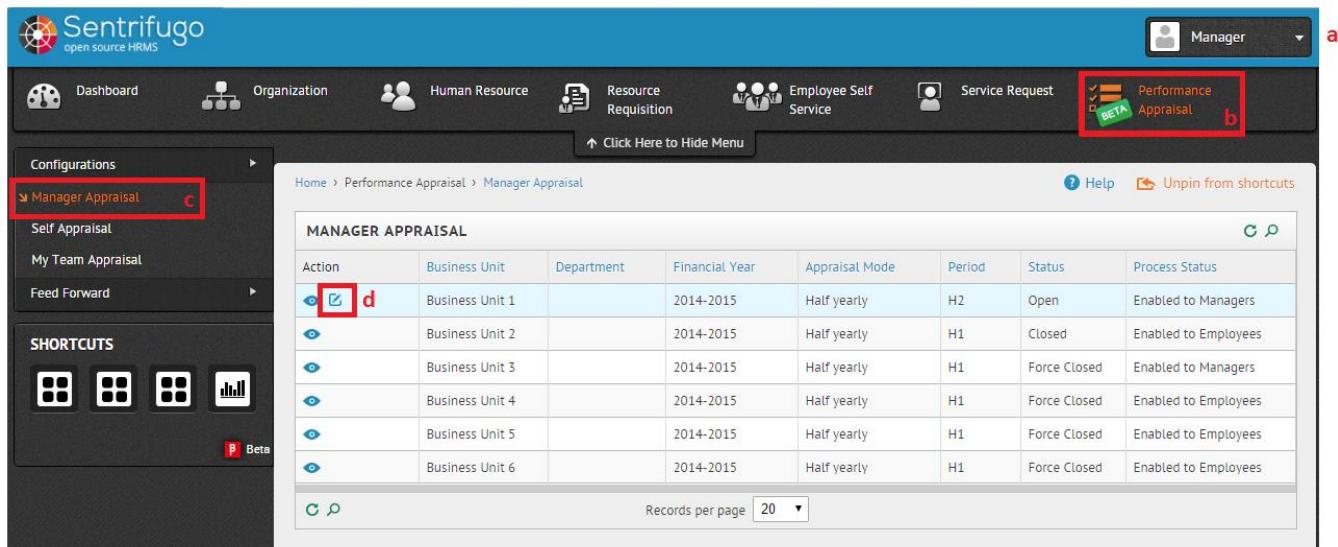
Figure 107

## Manager Appraisal

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

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

Refer Figure 108



Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Status	Process Status
<input checked="" type="checkbox"/> d	Business Unit 1		2014-2015	Half yearly	H2	Open	Enabled to Managers
<input type="checkbox"/>	Business Unit 2		2014-2015	Half yearly	H1	Closed	Enabled to Employees
<input type="checkbox"/>	Business Unit 3		2014-2015	Half yearly	H1	Force Closed	Enabled to Managers
<input type="checkbox"/>	Business Unit 4		2014-2015	Half yearly	H1	Force Closed	Enabled to Employees
<input type="checkbox"/>	Business Unit 5		2014-2015	Half yearly	H1	Force Closed	Enabled to Employees
<input type="checkbox"/>	Business Unit 6		2014-2015	Half yearly	H1	Force Closed	Enabled to Employees

Figure 108

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

Refer Figure 109

### Initialization Details

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

### Group Details

CREATE NEW GROUP
SUBMIT INITIALIZATION

Group Name \*

e

Employees

Search Employee

Employee 1  
(EMPP0029)  
Software Engineer

f

Selected Employees (0)

Search Employee

Employee 8  
(EMPP0029)  
Software Engineer

Configure Appraisal Parameters for All Employees

All | Selected
+ Add New Question
g

Questions	Answers
<input checked="" type="checkbox"/> Check All <span style="color: red;">i</span>  <input checked="" type="checkbox"/> h  <input checked="" type="checkbox"/>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings  <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings           </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings  <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings           </div> <div style="border: 1px solid #ccc; padding: 5px;"> <input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings  <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings           </div>

SAVE
l
Close

Figure 109

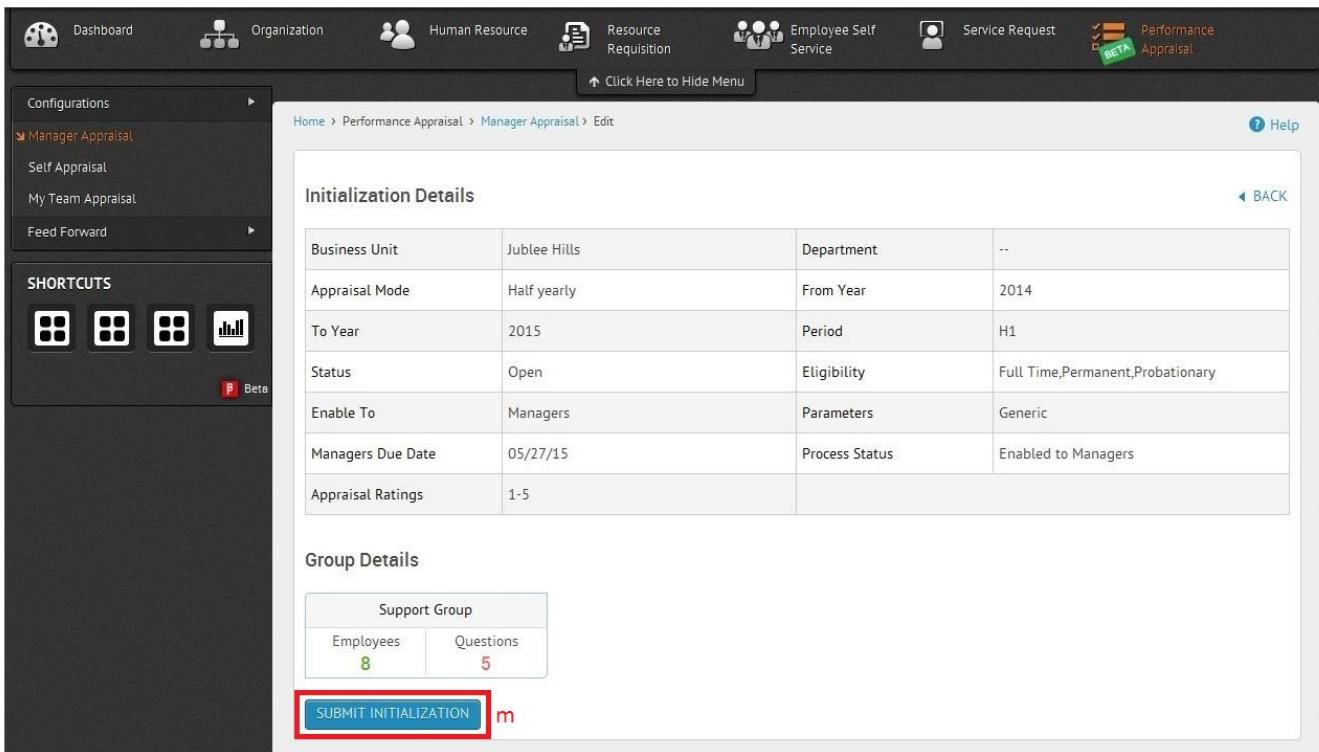
© Sentrifugo 2014 - All Rights Reserved

Page 82 of 95

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

- Click on Submit Initialization

Refer Figure 110



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

Support Group	
Employees	Questions
8	5

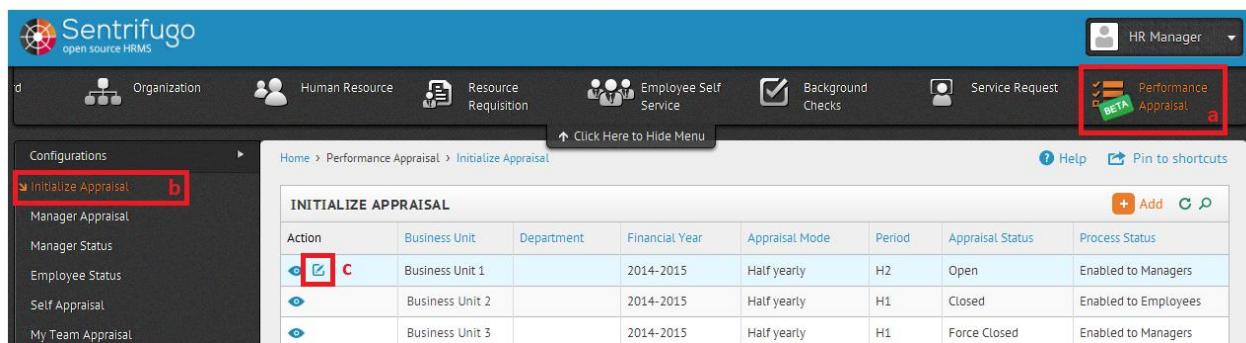
**SUBMIT INITIALIZATION**

Figure 110

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

- Click on Performance Appraisal in the header
- Click on Initialize Appraisal in the left side menu
- Click on edit icon with respect to an appraisal process

Refer Figure 111

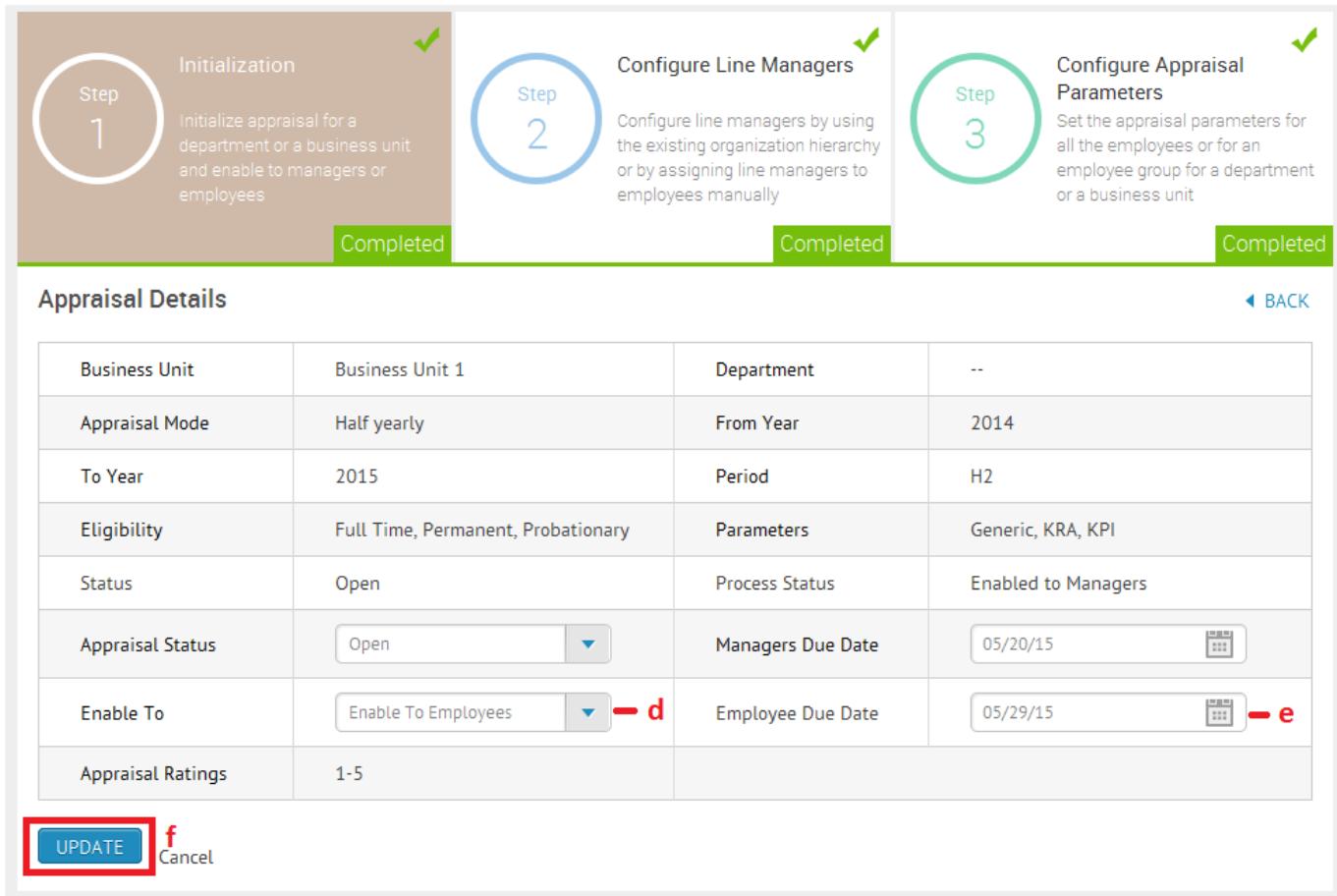


Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
	Business Unit 1		2014-2015	Half yearly	H2	Open	Enabled to Managers
	Business Unit 2		2014-2015	Half yearly	H1	Closed	Enabled to Employees
	Business Unit 3		2014-2015	Half yearly	H1	Force Closed	Enabled to Managers

Figure 111

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

Refer Figure 112



The screenshot shows the Sentrifugo Appraisal setup process. At the top, there are three steps:

- Step 1 Initialization**: Initialize appraisal for a department or a business unit and enable to managers or employees. Status: Completed.
- Step 2 Configure Line Managers**: Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually. Status: Completed.
- Step 3 Configure Appraisal Parameters**: Set the appraisal parameters for all the employees or for an employee group for a department or a business unit. Status: Completed.

Below the steps is the **Appraisal Details** section:

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		

At the bottom left are the **UPDATE** and **Cancel** buttons. The **UPDATE** button is highlighted with a red box and labeled 'f'. The **Cancel** button is labeled 'd' with a red dash.

Figure 112

## Manager Status

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

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

Refer Figure 113

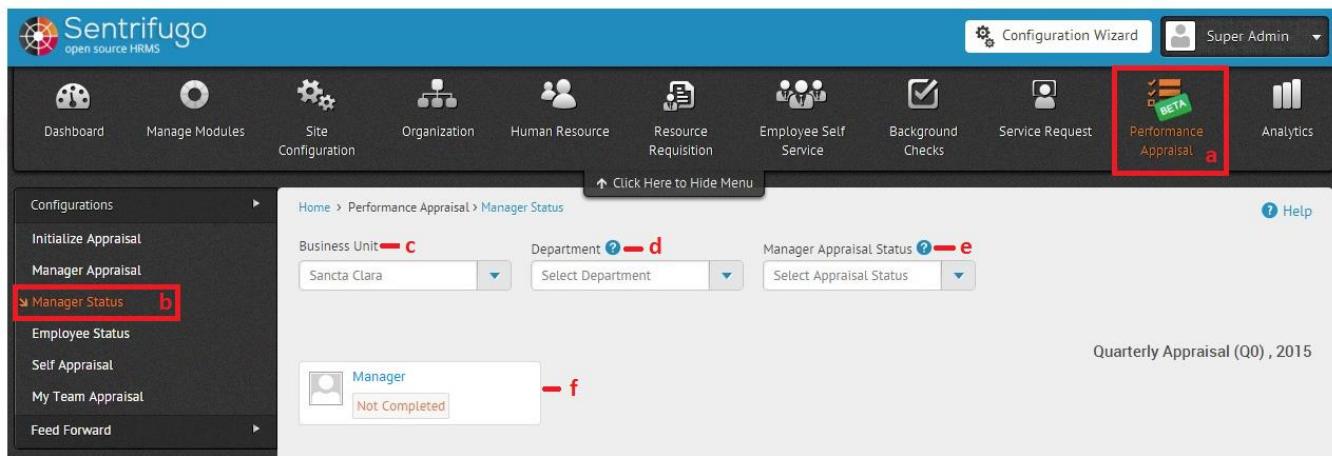


Figure 113

## Employee Status

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

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

Refer Figure 114

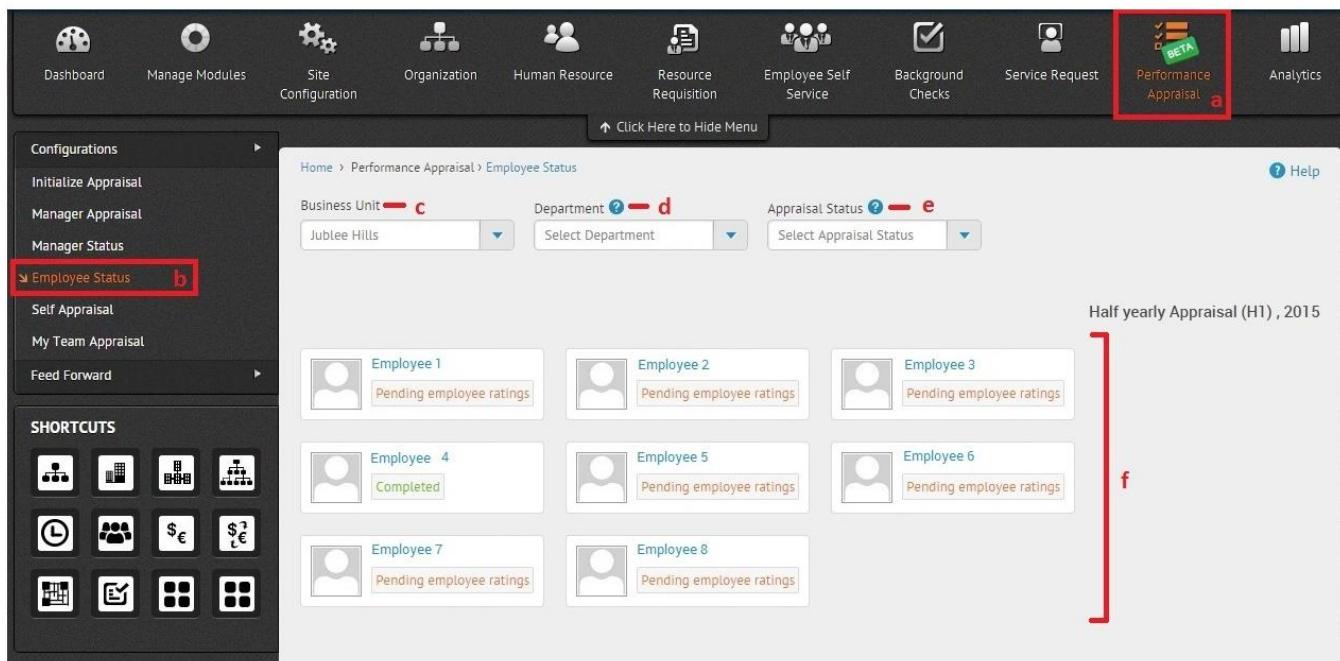


Figure 114

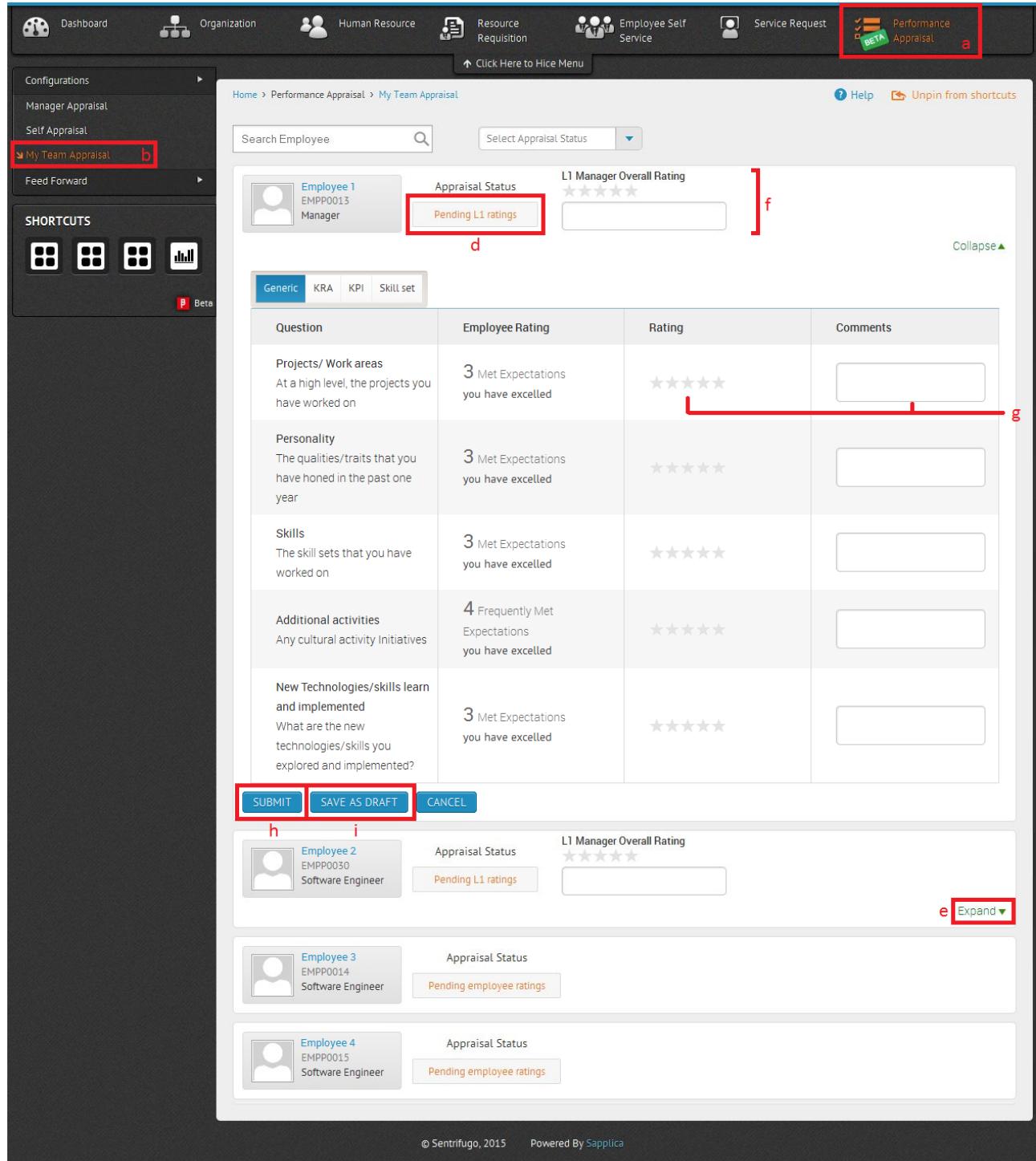
## My Team Appraisal

Managers will be able to view their team employees' appraisal status. Once the employees completes the appraisal process, the managers will be able to provide ratings and comments to the employees. Based on the levels of appraisal, the employee appraisal process will be enabled to the line managers.

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

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

Refer Figure 115



Question	Employee Rating	Rating	Comments
Projects/ Work areas At a high level, the projects you have worked on	3 Met Expectations you have excelled	★★★★★	
Personality The qualities/traits that you have honed in the past one year	3 Met Expectations you have excelled	★★★★★	
Skills The skill sets that you have worked on	3 Met Expectations you have excelled	★★★★★	
Additional activities Any cultural activity Initiatives	4 Frequently Met Expectations you have excelled	★★★★★	
New Technologies/skills learn and implemented What are the new technologies/skills you explored and implemented?	3 Met Expectations you have excelled	★★★★★	

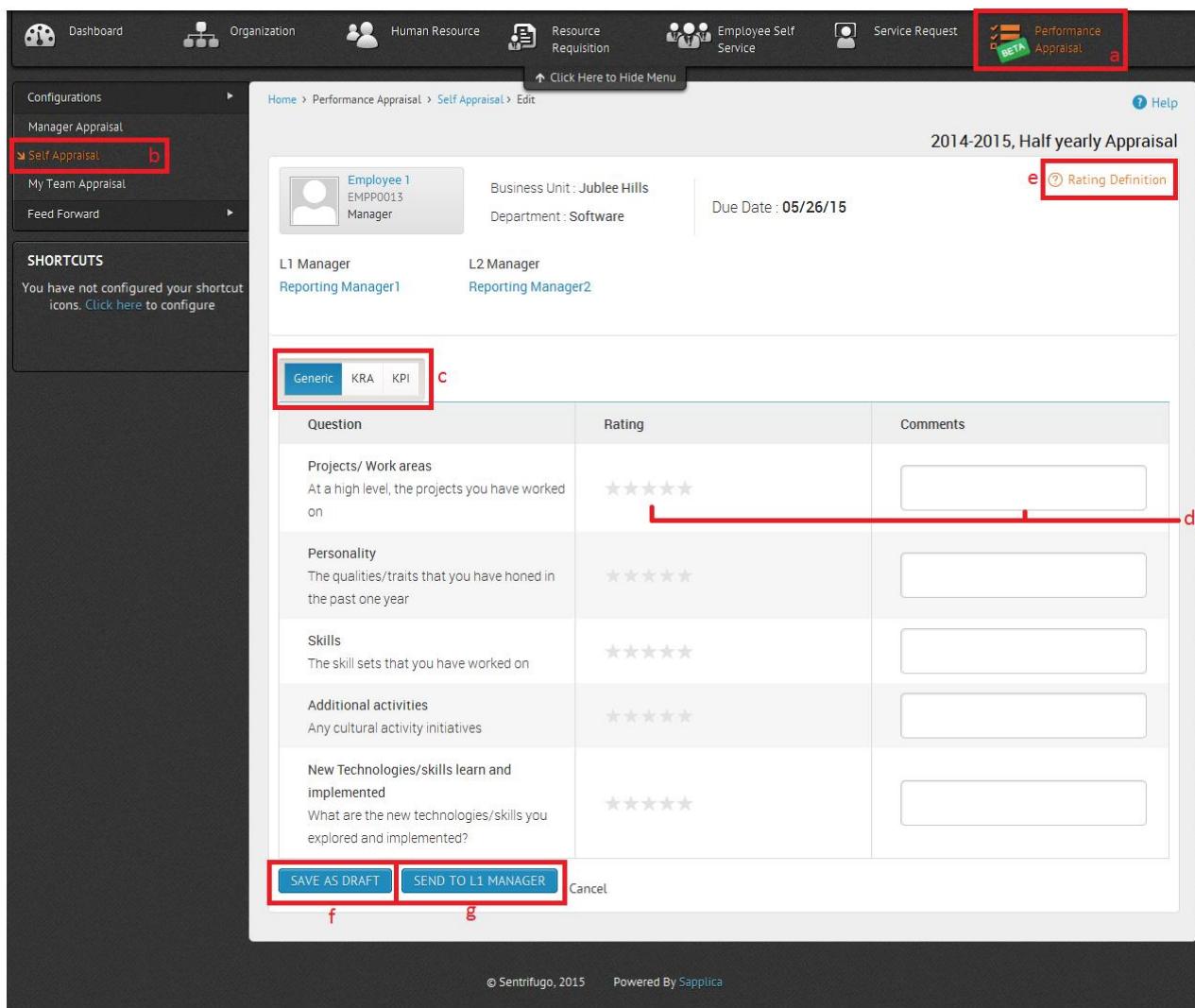
Figure 115

## Self Appraisal

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

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

Refer Figure 116



2014-2015, Half yearly Appraisal

Employee 1  
EMPP0013  
Manager

Business Unit : Jubilee Hills  
Department : Software  
Due Date : 05/26/15

L1 Manager: Reporting Manager1 | L2 Manager: Reporting Manager2

Question	Rating	Comments
Projects/ Work areas At a high level, the projects you have worked on	★★★★★	
Personality The qualities/traits that you have honed in the past one year	★★★★★	
Skills The skill sets that you have worked on	★★★★★	
Additional activities Any cultural activity initiatives	★★★★★	
New Technologies/skills learn and implemented What are the new technologies/skills you explored and implemented?	★★★★★	

SAVE AS DRAFT | SEND TO L1 MANAGER | Cancel

Figure 116

## Feed Forward

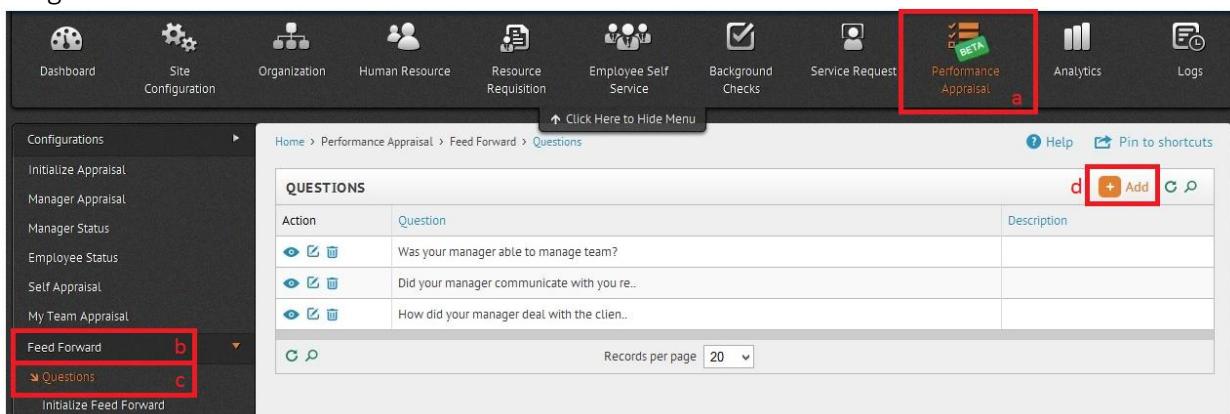
Feed Forward is the feedback given by the employees to appraise their respective line managers. All the configurations are done on management level. Once all the employees have appraised their managers, managers' appraisal process will be carried out by the management.

## Questions

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

- Click on Performance Appraisal in the header
- Click on Feed Forward in the left side menu
- Click on Question in the submenu links
- Click on Add in the right side grid

Refer Figure 117



Action	Question	Description
	Was your manager able to manage team?	
	Did your manager communicate with you re...	
	How did your manager deal with the clien...	

Figure 117

- Add the question and description if required
- Click on Add New Question to add more questions
- Click on Save

Refer Figure 118

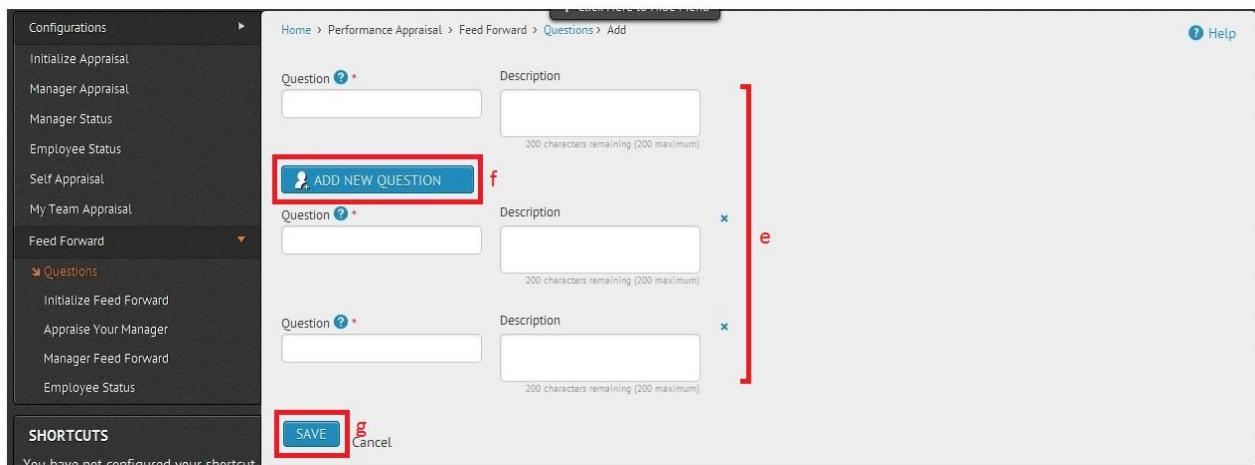


Figure 118

## Initialize feed forward

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

**Appraisal:** Select the appraisal from the populated dropdown. The appraisal details grid is displayed in the screen where Business Unit, Department, Appraisal Mode, From Year, To Year and Period are displayed.

**Status:** Feed Forward status will be "Open" by default. Upon the initialization of feed forward, close and force close options will be made available

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

**Employee Details:** Here, the Management will determine if the management can view only the feedback given by the employee or the feedback along with the employee names.

**Show:** Employee names and their feedbacks will be displayed

**Hide:** Only the feedbacks will be displayed

**Enable to:** The Management will determine if all employees can appraise their managers or only the employees eligible for appraisal

**Appraisal Employees:** All the employees eligible for appraisal process can appraise their managers

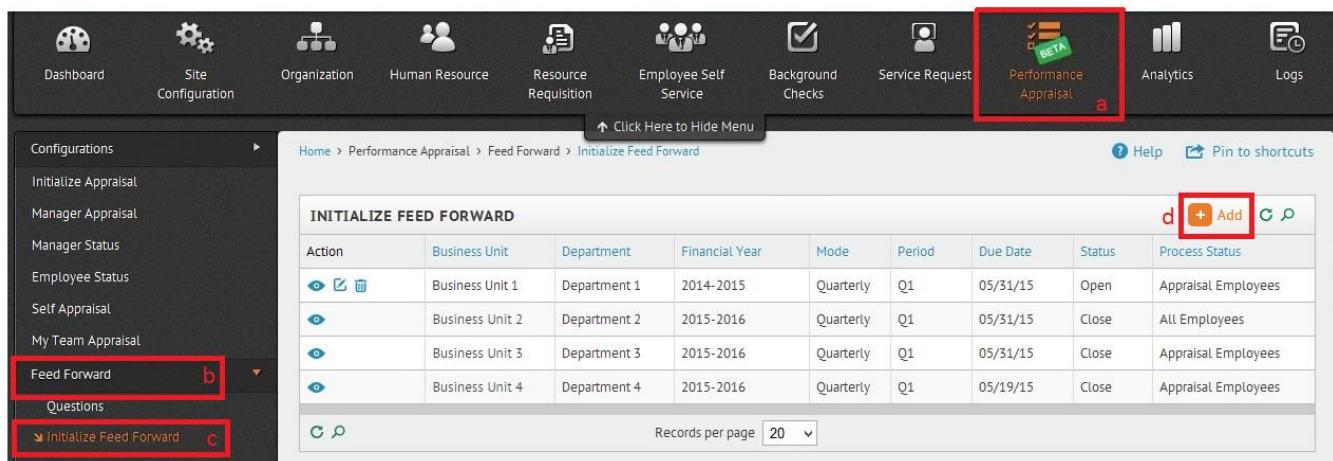
**All Employees:** All the employees in the organization can appraise their managers

**Due Date:** The due date is for closing the Feed Forward process for employees

**Configure Questions:** All the questions added by the Management will be displayed. If more questions are to be added, Add New Question link is also provided.

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

Refer Figure 119

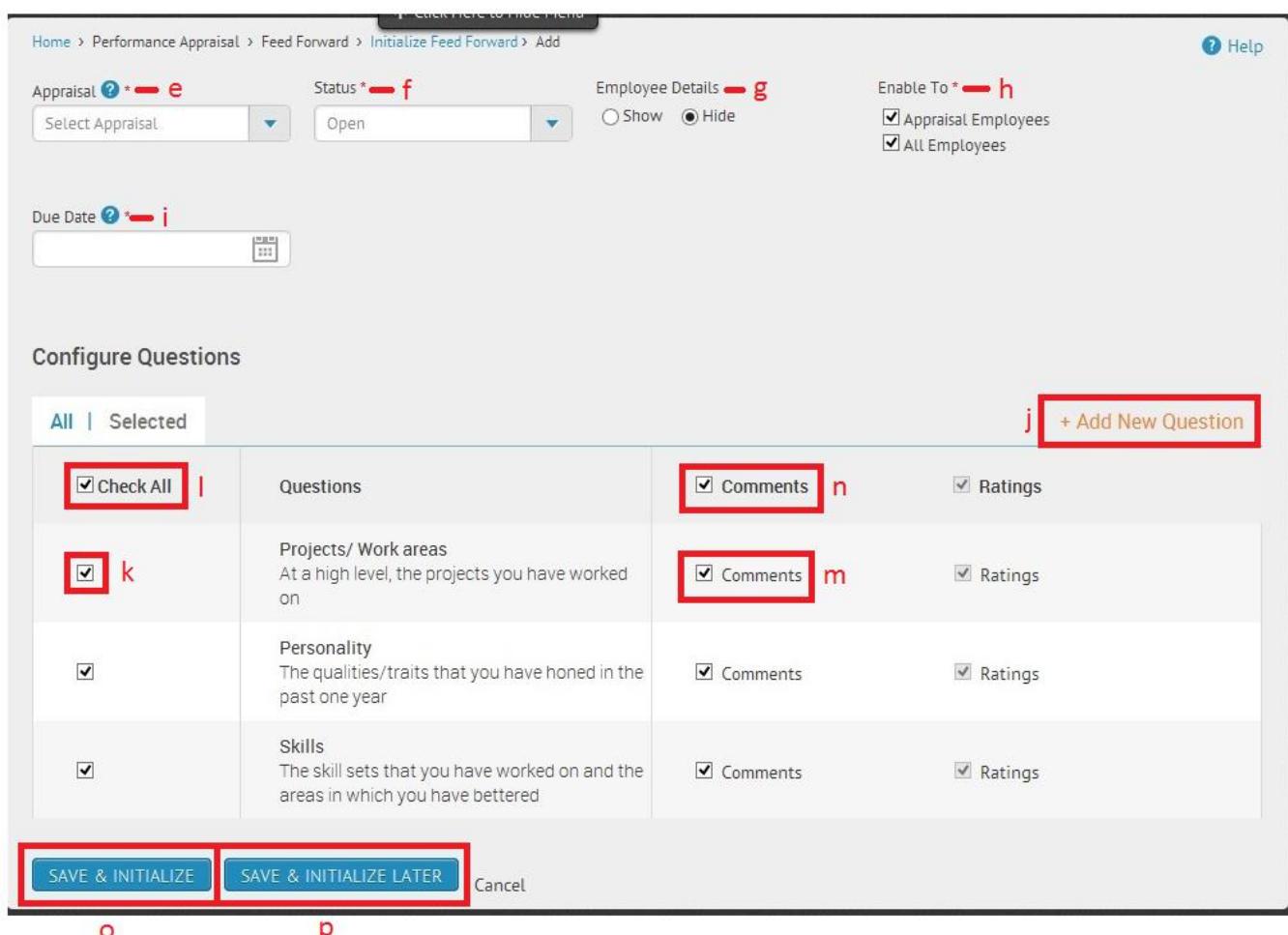


Action	Business Unit	Department	Financial Year	Mode	Period	Due Date	Status	Process Status
	Business Unit 1	Department 1	2014-2015	Quarterly	Q1	05/31/15	Open	Appraisal Employees
	Business Unit 2	Department 2	2015-2016	Quarterly	Q1	05/31/15	Close	All Employees
	Business Unit 3	Department 3	2015-2016	Quarterly	Q1	05/31/15	Close	Appraisal Employees
	Business Unit 4	Department 4	2015-2016	Quarterly	Q1	05/19/15	Close	Appraisal Employees

Figure 119

- e. Select an appraisal process from the Appraisal dropdown
- f. The Status will be by default selected as Open
- g. Define whether or not you want to view the employee details along with their feedback ratings and comments
- h. Enable Feed Forward to all employees or only to employees who are eligible for Appraisal process
- i. Pick a date for employees to provide their feedback
- j. Click on Add New Question to add questions for Feed Forward
- k. Select Questions individually by checking the checkbox respective to each question  
Or
- l. Select all the questions by checking the Check All option in the table header
- m. Select comments individually for all the questions  
Or
- n. Select comments by checking the Comments checkbox in the table header
- o. Click on Save & Initialize to initialize the Feed Forward process
- p. Click on Save & Initialize Later to only save the Feed Forward process

Refer Figure 120



The screenshot shows the 'Initialize Feed Forward' page in the Sentrifugo application. At the top, there are fields for 'Appraisal' (dropdown), 'Status' (Open), 'Employee Details' (Show), and 'Enable To' (checkboxes for 'Appraisal Employees' and 'All Employees'). Below this is a 'Due Date' field with a calendar icon. The main area is titled 'Configure Questions' and contains a table with four rows. Each row has a checkbox labeled 'Check All' (highlighted with a red box) and a question description. To the right of each question are checkboxes for 'Comments' (highlighted with a red box) and 'Ratings'. At the bottom of the table are buttons for 'SAVE & INITIALIZE' (highlighted with a red box) and 'SAVE & INITIALIZE LATER'.

Configure Questions			
All	Selected	j + Add New Question	
<input checked="" type="checkbox"/> Check All	Questions	<input checked="" type="checkbox"/> Comments	<input checked="" type="checkbox"/> Ratings
<input checked="" type="checkbox"/> k	Projects/ Work areas At a high level, the projects you have worked on	<input checked="" type="checkbox"/> Comments	<input checked="" type="checkbox"/> Ratings
<input checked="" type="checkbox"/>	Personality The qualities/traits that you have honed in the past one year	<input checked="" type="checkbox"/> Comments	<input checked="" type="checkbox"/> Ratings
<input checked="" type="checkbox"/>	Skills The skill sets that you have worked on and the areas in which you have bettered	<input checked="" type="checkbox"/> Comments	<input checked="" type="checkbox"/> Ratings

o SAVE & INITIALIZE p SAVE & INITIALIZE LATER Cancel

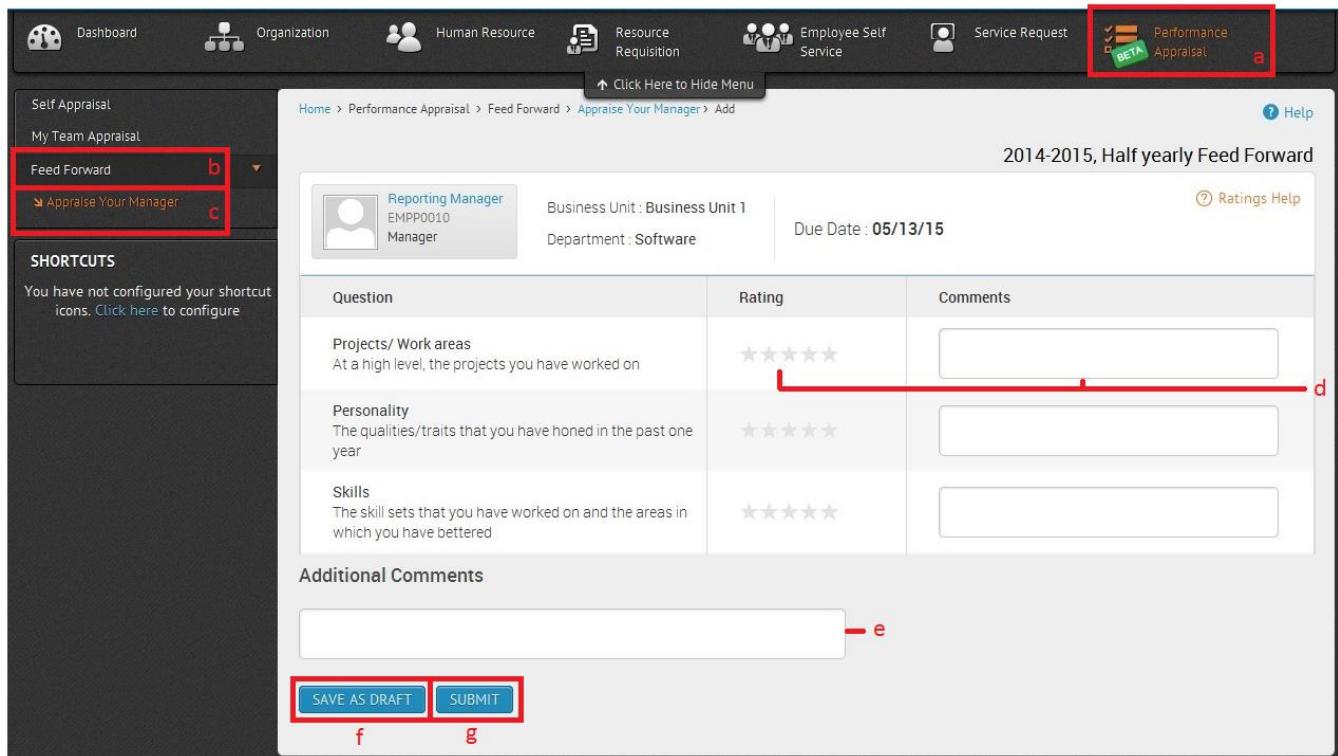
Figure 120

## Appraise Your Managers

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

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

Refer Figure 121



Self Appraisal

My Team Appraisal

**Feed Forward** b

Appraise Your Manager c

**SHORTCUTS**

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

Reporting Manager  
EMPP0010  
Manager

Business Unit : Business Unit 1  
Department : Software

Due Date : 05/13/15

2014-2015, Half yearly Feed Forward

Ratings Help

Question	Rating	Comments
Projects/ Work areas At a high level, the projects you have worked on	★★★★★	d
Personality The qualities/traits that you have honed in the past one year	★★★★★	
Skills The skill sets that you have worked on and the areas in which you have bettered	★★★★★	

Additional Comments

e

SAVE AS DRAFT f SUBMIT g

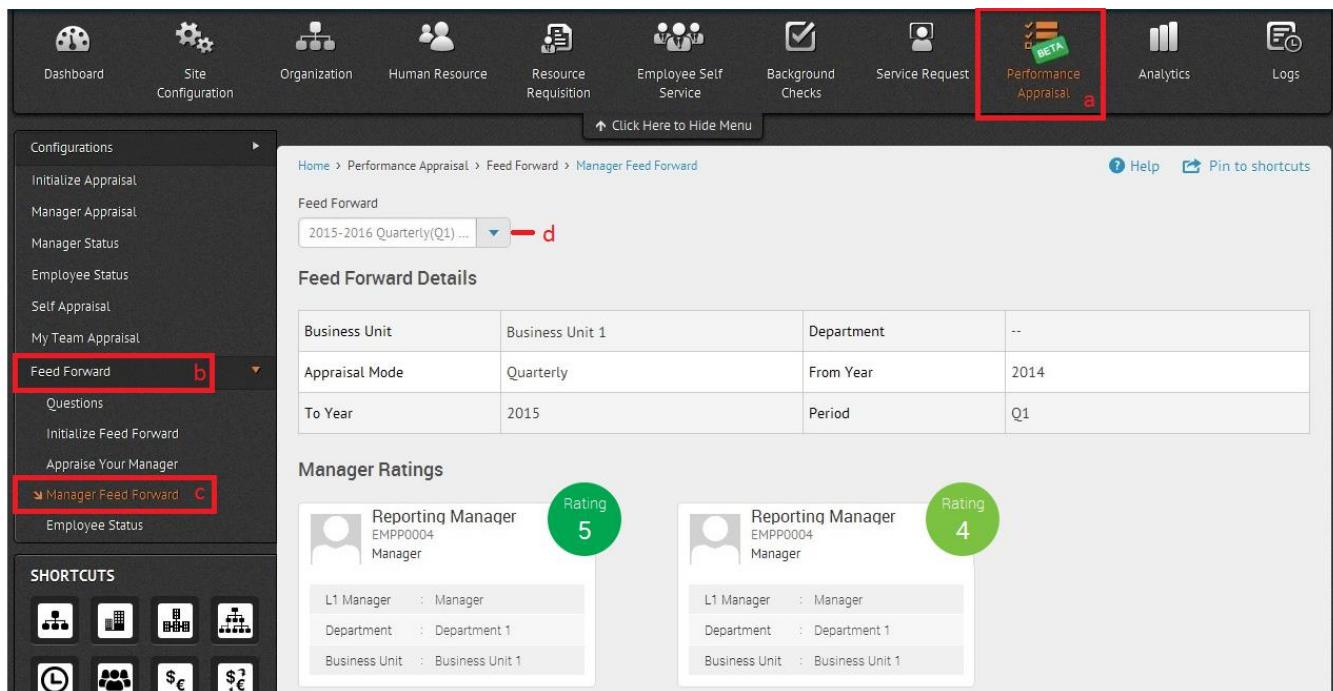
Figure 121

## Manager Feed Forward

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

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

Refer Figure 122



**Feed Forward Details**

Business Unit	Business Unit 1	Department	--
Appraisal Mode	Quarterly	From Year	2014
To Year	2015	Period	Q1

**Manager Ratings**

Reporting Manager EMPP0004 Manager	Rating 5
L1 Manager : Manager	
Department : Department 1	
Business Unit : Business Unit 1	

Reporting Manager EMPP0004 Manager	Rating 4
L1 Manager : Manager	
Department : Department 1	
Business Unit : Business Unit 1	

Figure 122

- e. Click on individual manager section to view the ratings and comments provided by employees
- f. Select By Questions to view the ratings and comments based on questions
- g. Select By Employee to view the ratings and comments of each employee

Refer Figure 123

### Manager Feed Forward

 Reporting Manager  
EMPP0004  
Manager

5 Exceeds Expectations  
★★★★★

Department : Department 1  
 Business Unit : Business Unit 1  
 L1 Manager : Manager

e
f
g

🔍

By Question
By Employee

Click on the Employee to view his/her comments

 Employee  
EMPP0036  
Manager

**Projects/ Work areas**

Has excelled in all his tasks

★★★
★★★★

**Personality**

Has excelled in all his tasks

★★★
★★★★

**Skills**

Has excelled in all his tasks

★★★
★★★★

Figure 123

© Sentrifugo 2014 - All Rights Reserved

Page 94 of 95

## Employee Status

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

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

Refer Figure 124

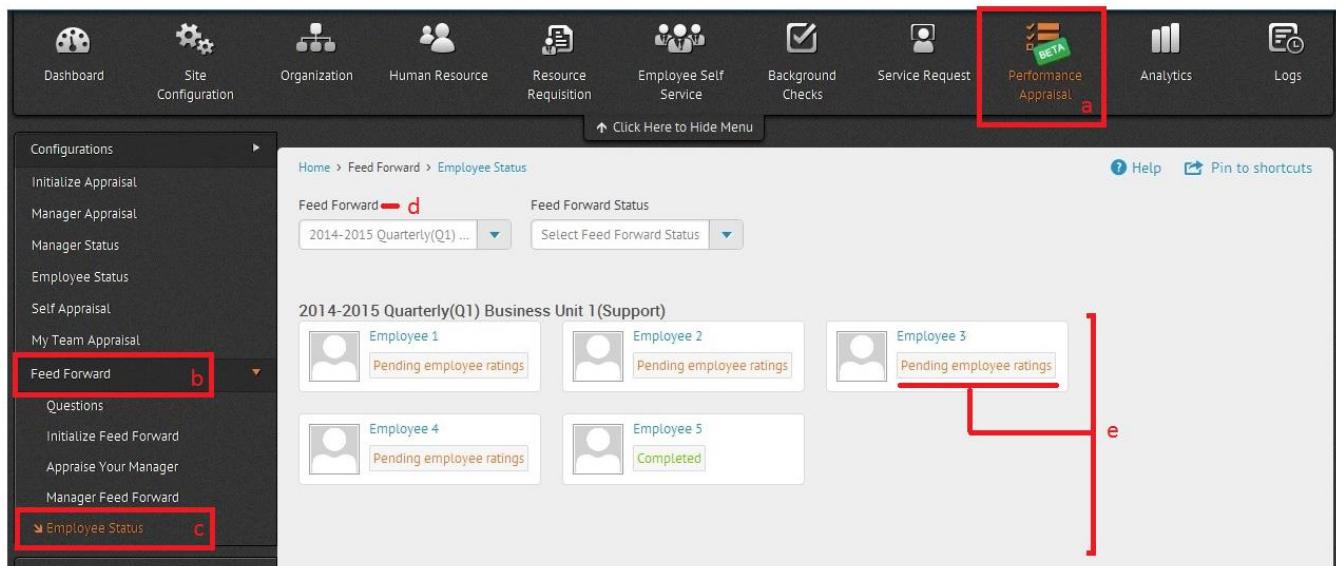


Figure 124