Sentrifugo

User Guide

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Getting Started with Sentrifugo

Three frequently used icons in Sentrifugo:

 View Icon  Edit Icon  Delete Icon

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.

Set up Configuration Wizard

Information is gathered in 5 steps. The first is the Modules section.

a. All the modules are displayed in circular representation
b. Click on the module icon to make it activate or inactive
c. Click on Save to apply the changes made
d. Click on Next to proceed to the next step

Refer Figure 1

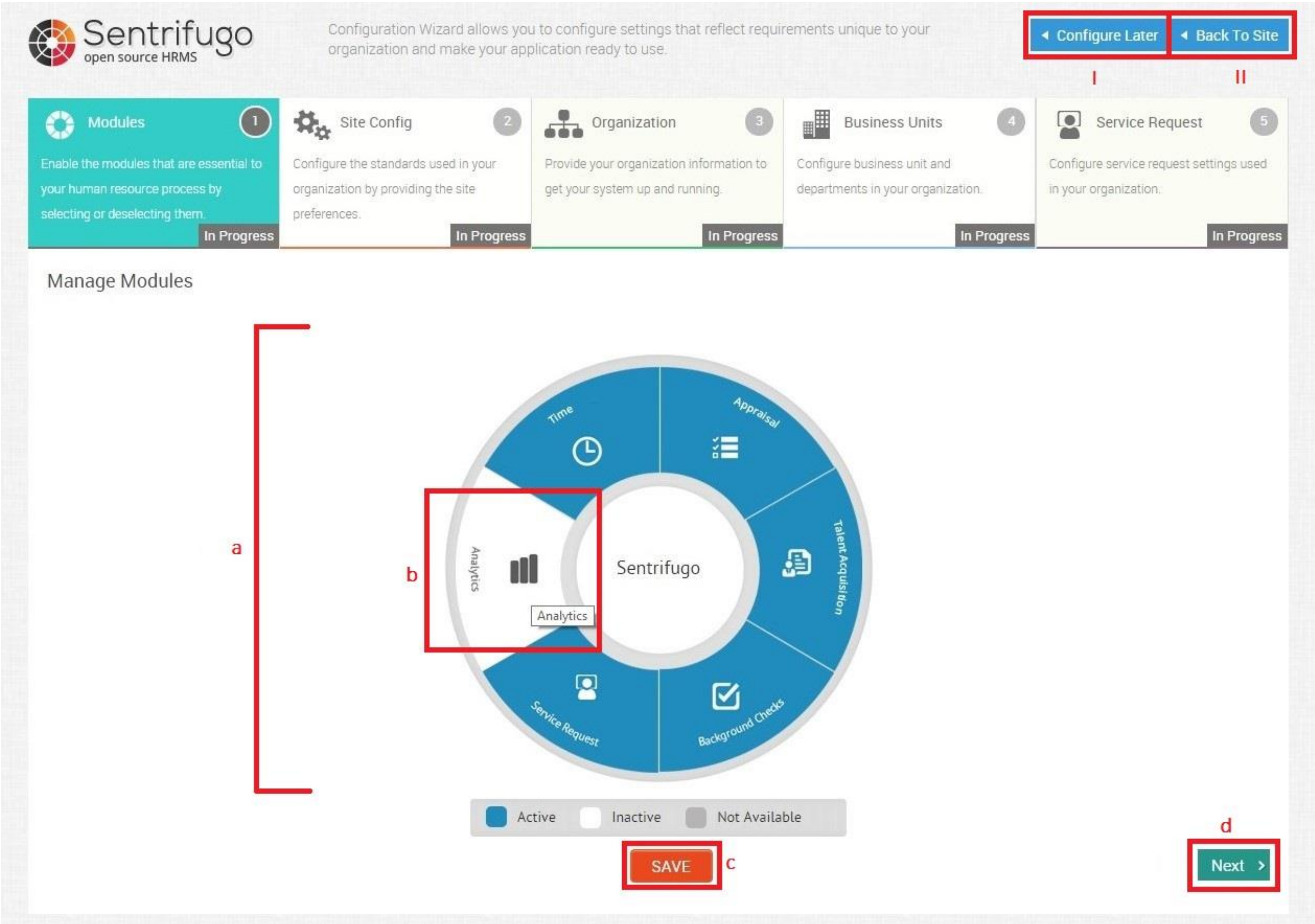


Figure 1

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

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

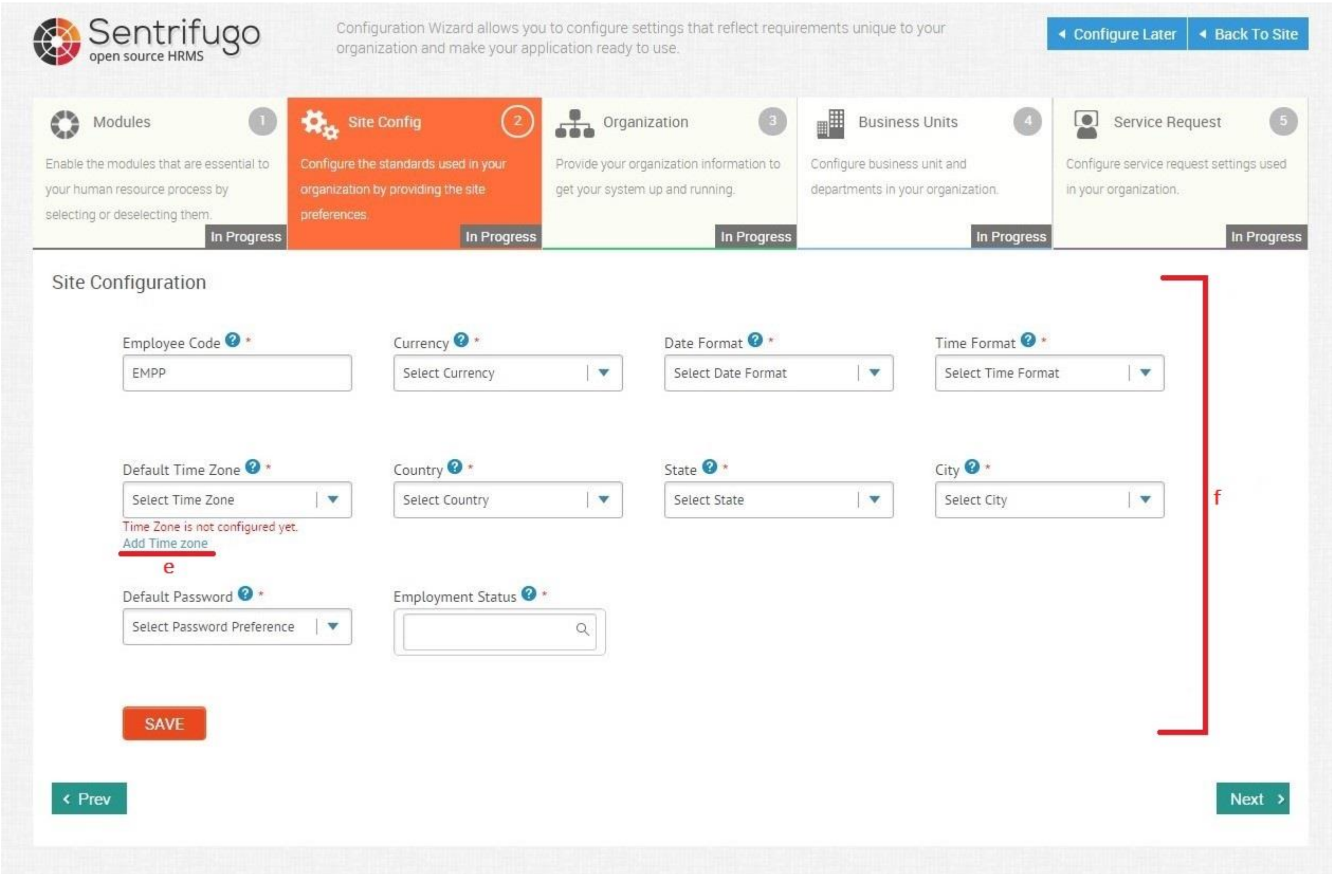


Figure 1.1

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

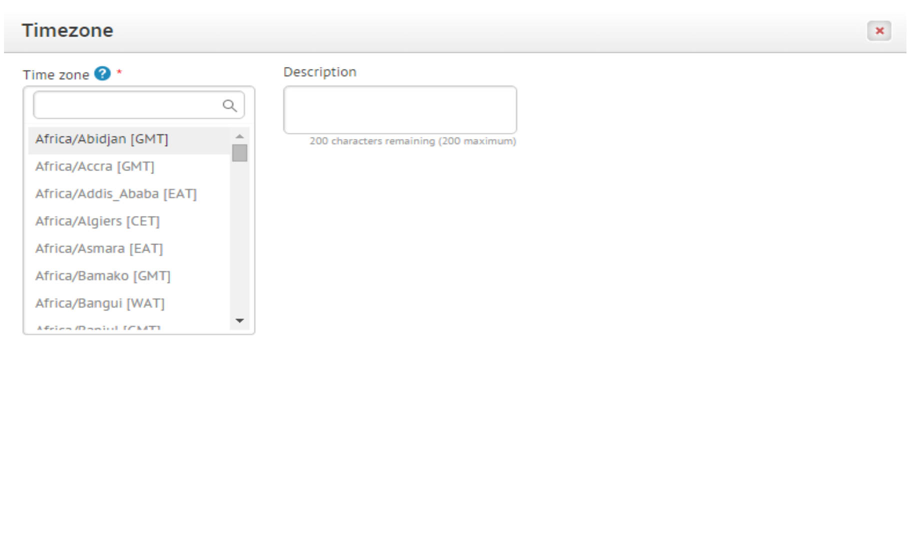


Figure 1.2

In the **Organization** section, provide organization information

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

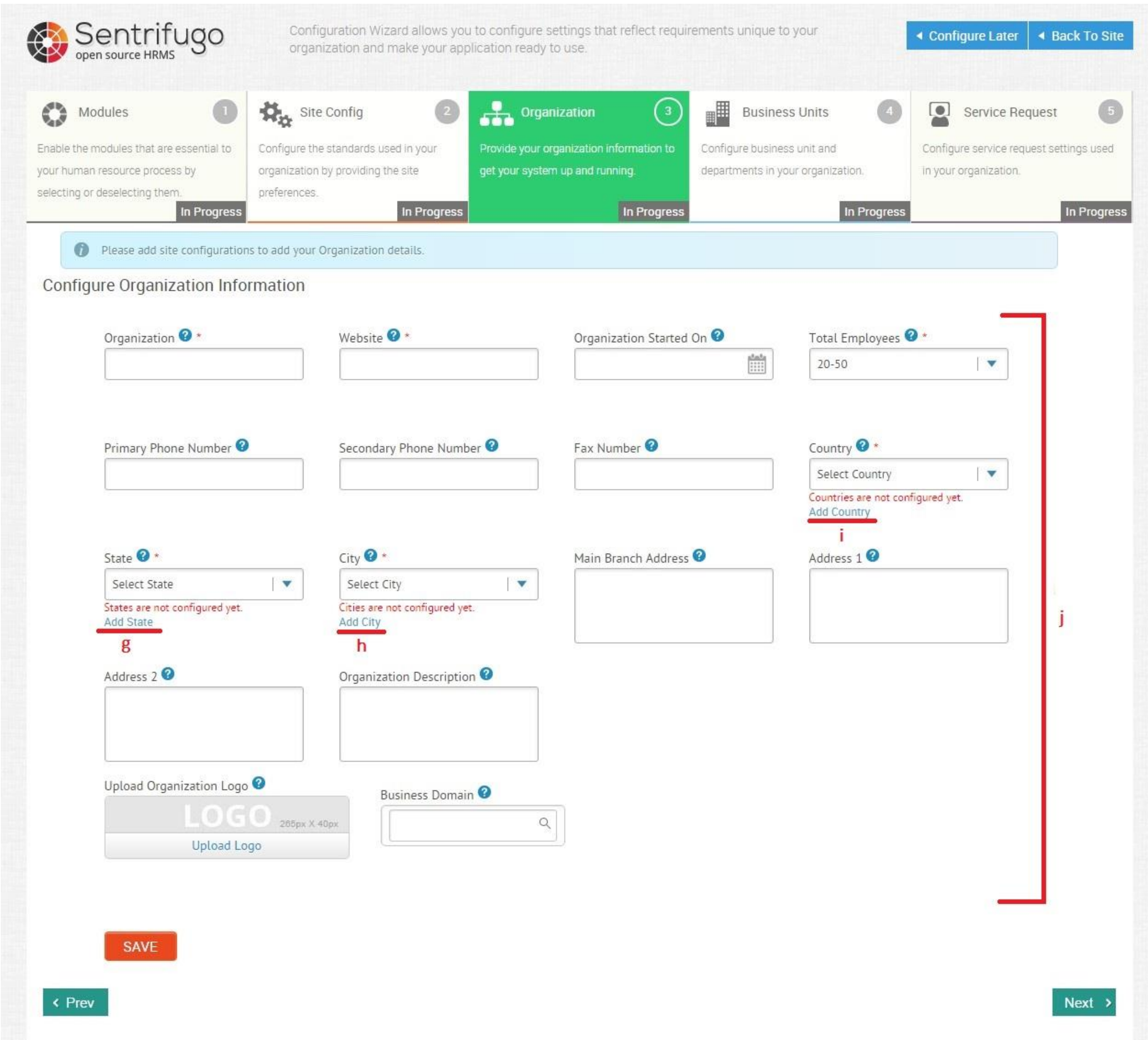


Figure 1.3

After saving your organization's details, a ADD EMPLOYEE button will appear on the top right corner of the configuration wizard screen. However, it is not mandatory to add an employee in this step, you can even add an employee after the entire configuration is completed. The first employee you add (Employee #2) will be the head of the organization.

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

On clicking ADD EMPLOYEE the below screen will appear:

k. Enter the all the mandatory details
l. Position can be configured later
m. Job title can be configured later
n. Go back to the configuration wizard and resume configuring your application

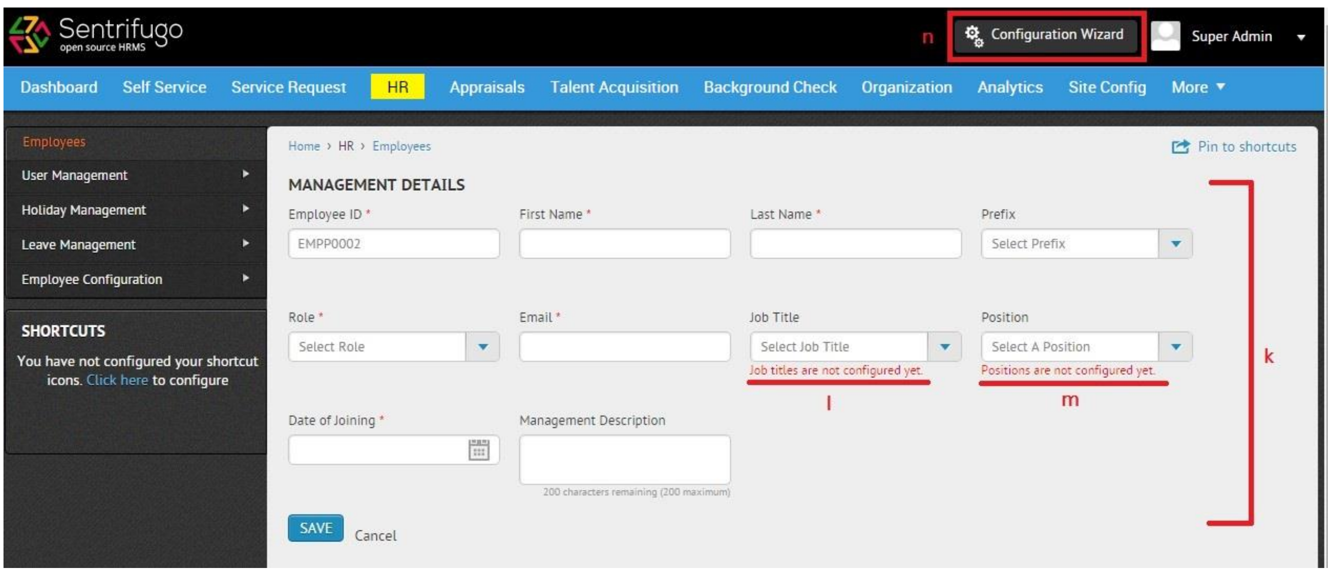


Figure 1.4

The next section is **Business Units**, this is where the business units and departments can be created.

o. Create a new business unit by giving its name and street address.
p. Create a new department within the business unit
q. Add another department (To have multiple departments under a business unit)

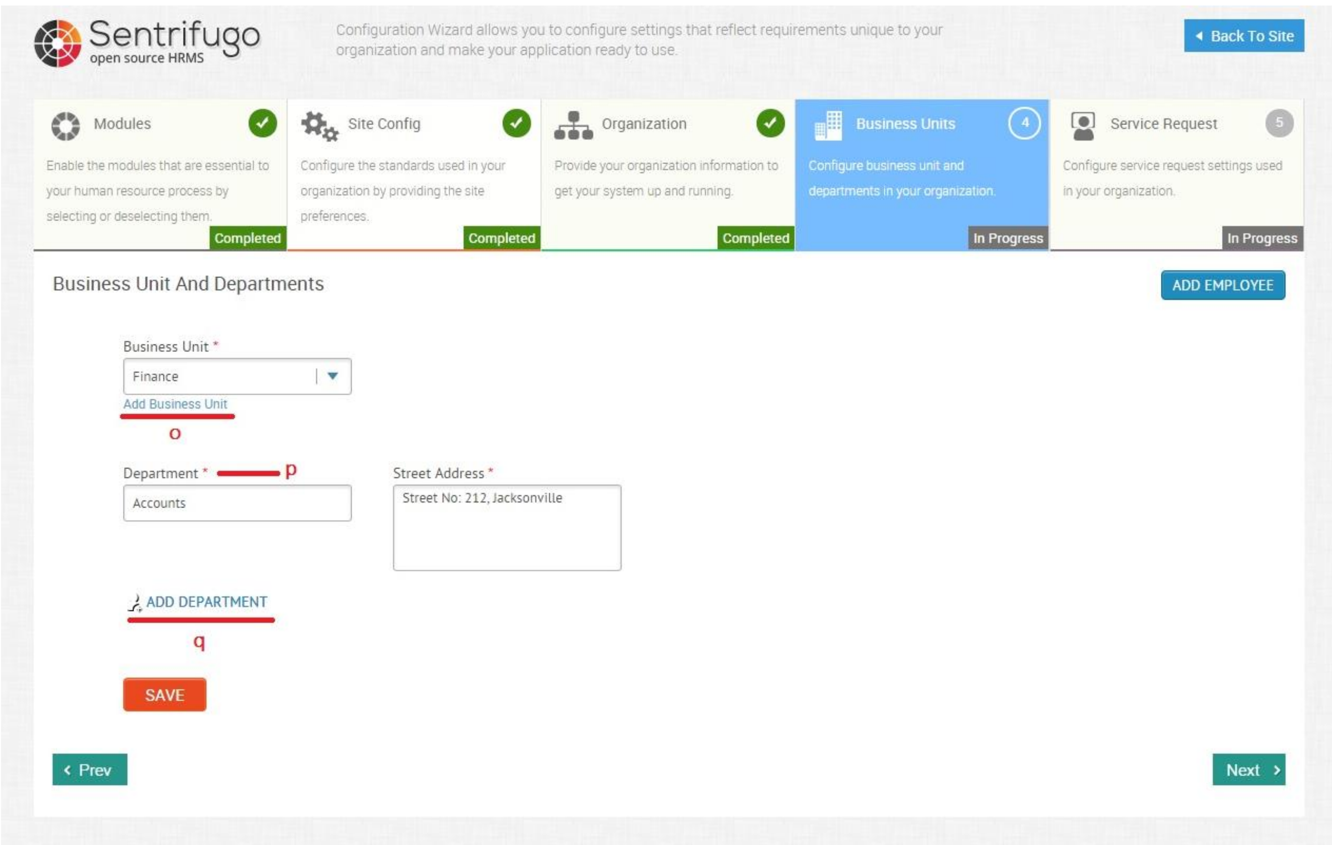


Figure 1.5

The final section in configuration wizard is **Service Request.**

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

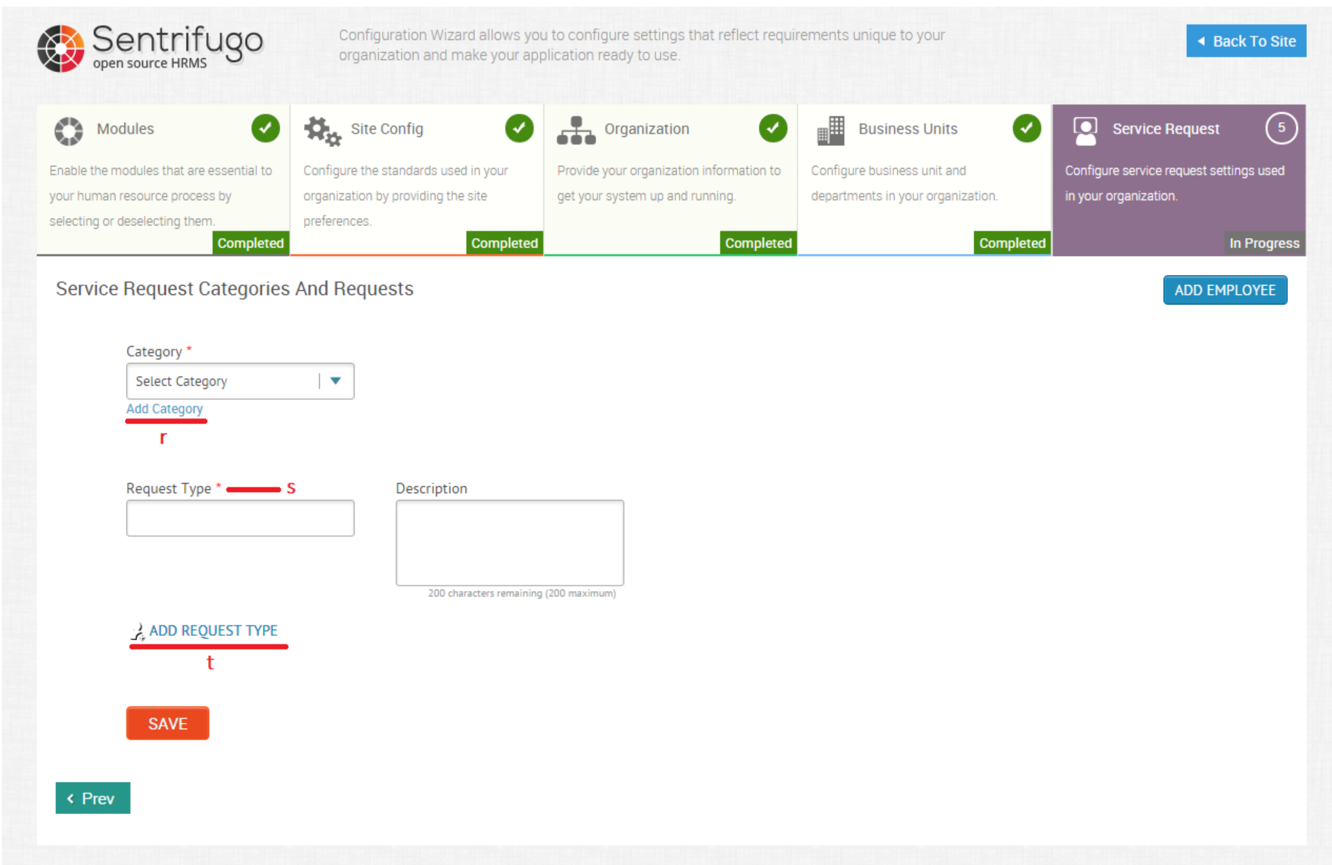


Figure 1.6

Click on **Back To Site** to go back to the application site and exit the configuration wizard.

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

Setting up the Dashboard:

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

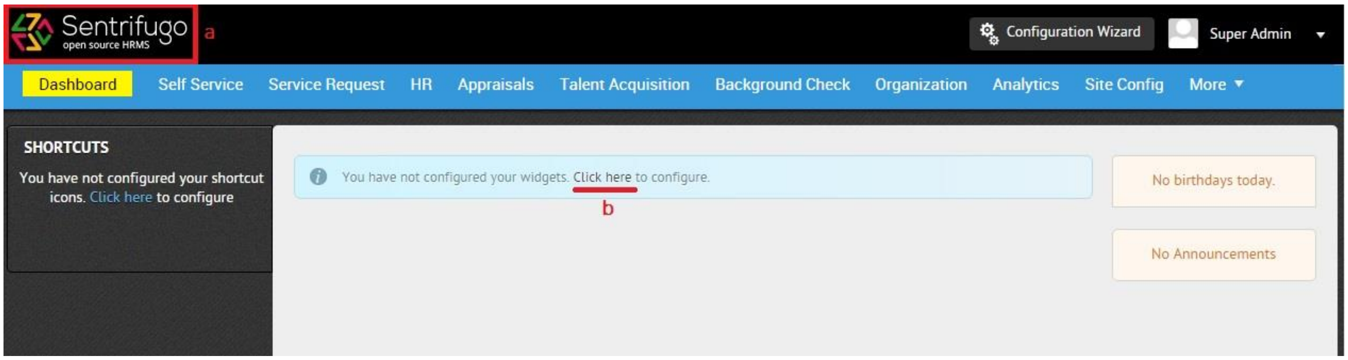


Figure 2

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

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

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 corner of the page

(Common for all)

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 pane

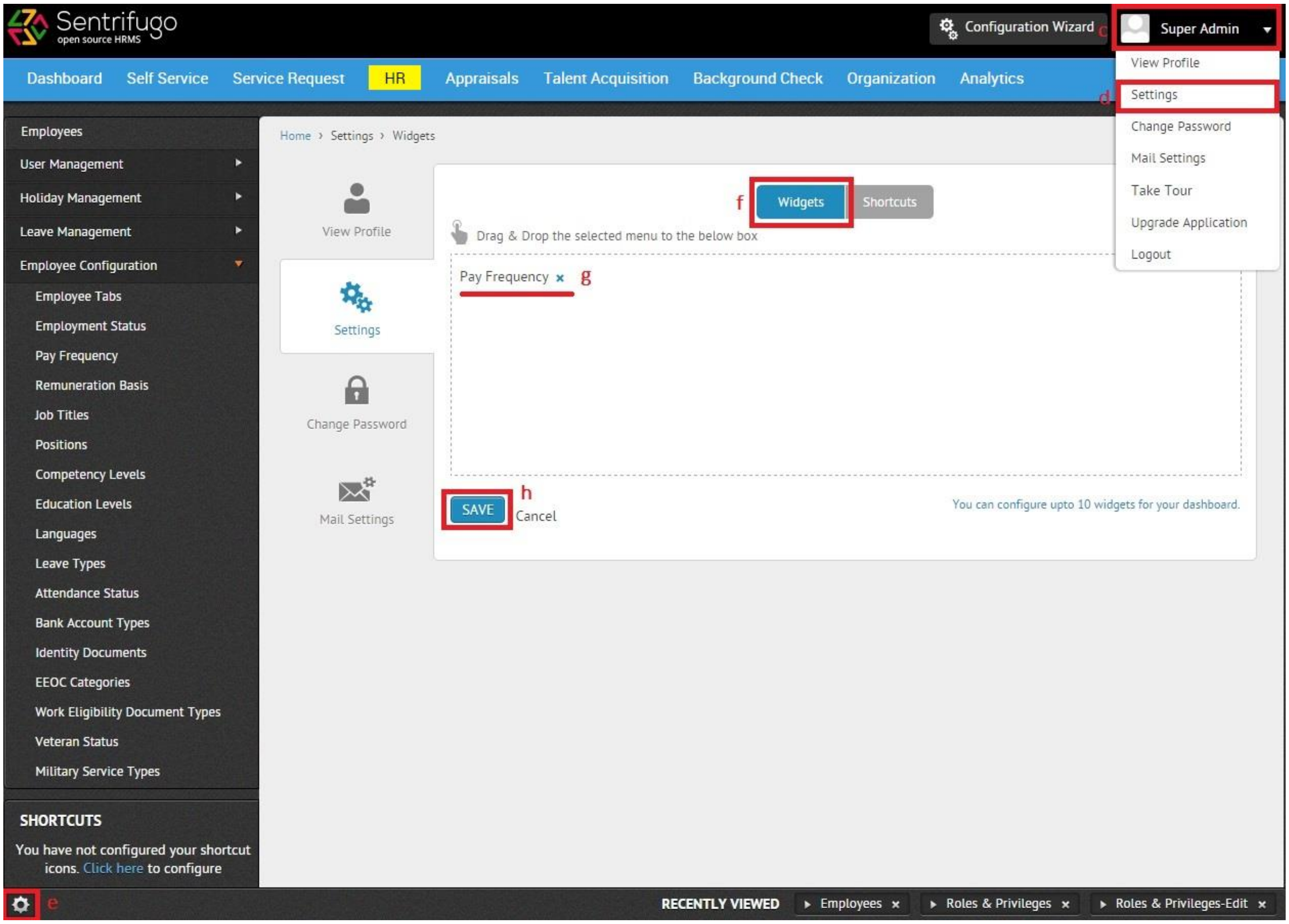


Figure 2.1

Note: Click on 'Cancel' to exit the widgets screen.

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

a. Click on 'Organization' in the top menu
b. Click on Announcements
c. Click on Add
d. Select the business unit(s), department and title
e. Upload attachments if required
f. Click on Post to publish the announcements

Refer Figure 3 & 3.1

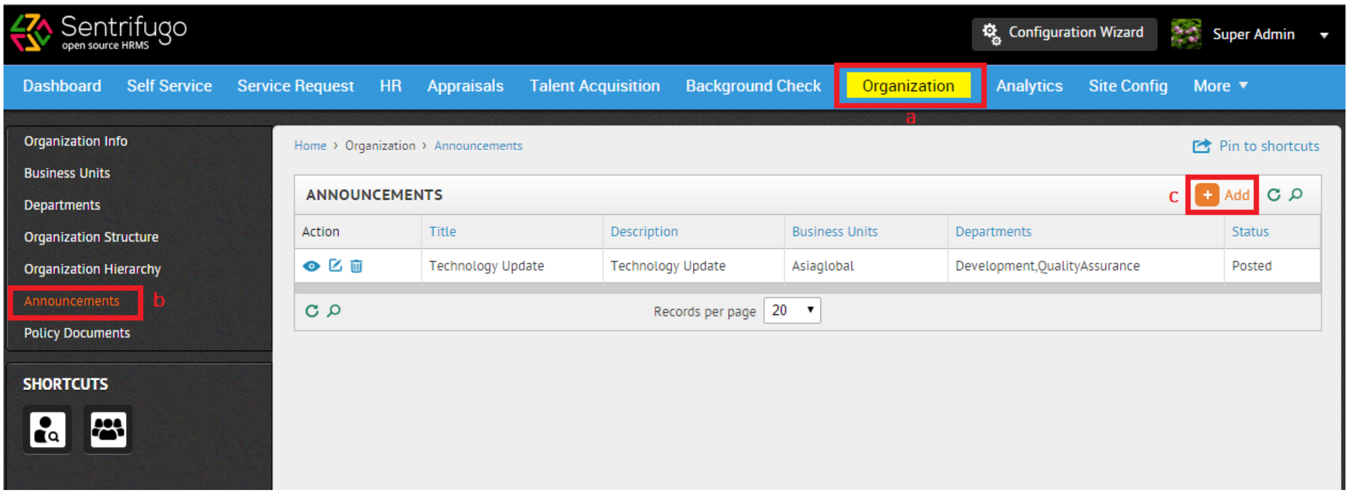


Figure 3

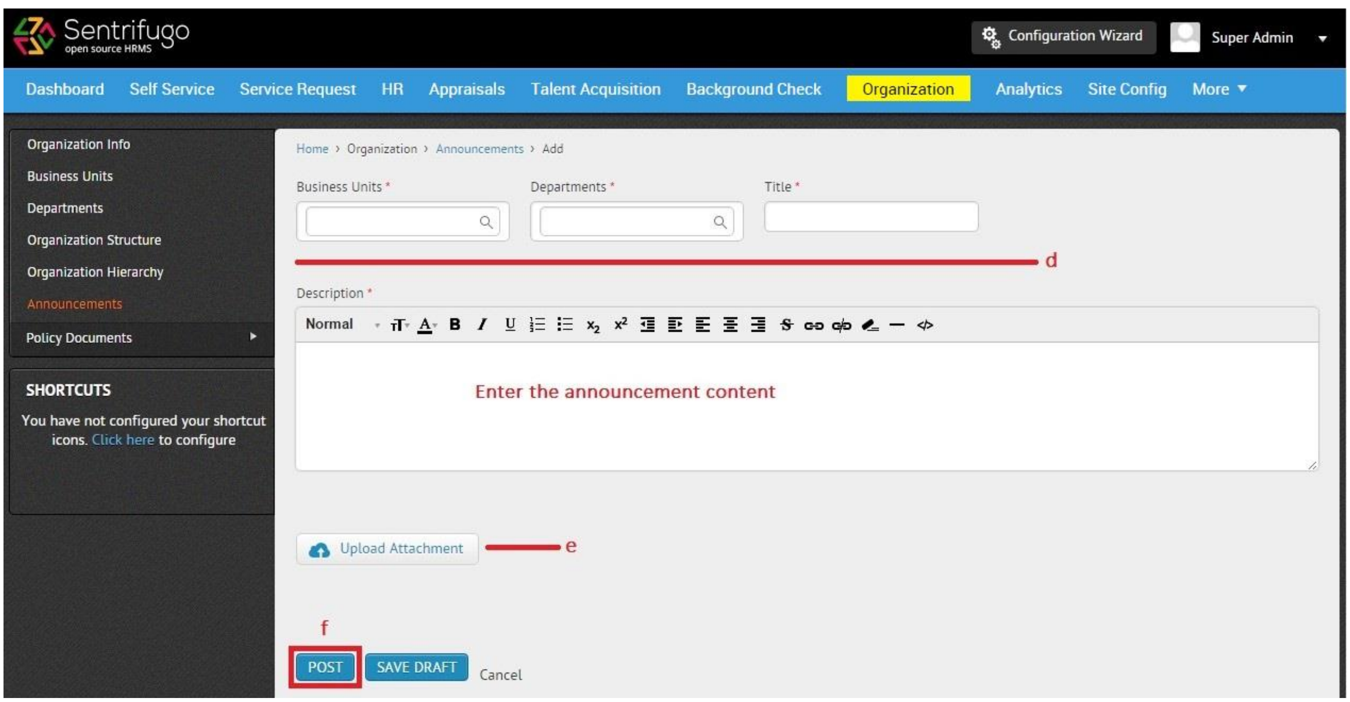


Figure 3.1

Configure Site Config within the Application

a. Click on Site Config 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 detail

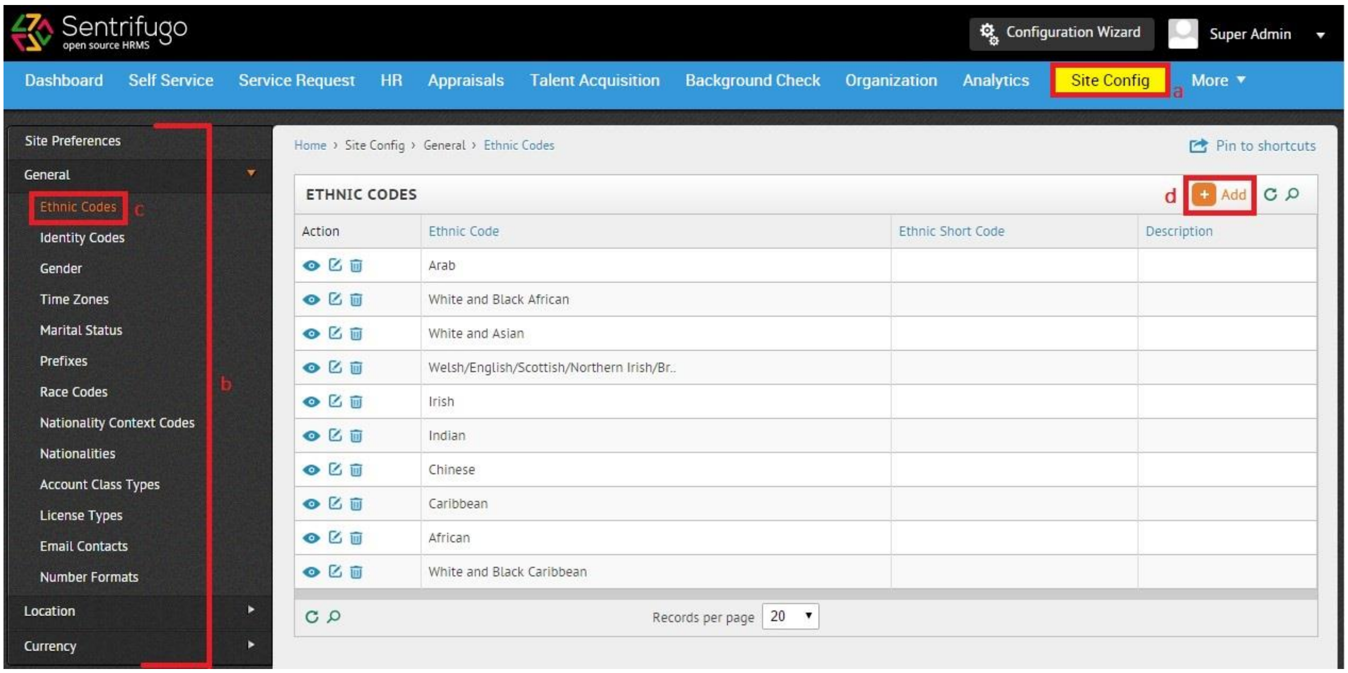


Figure 4

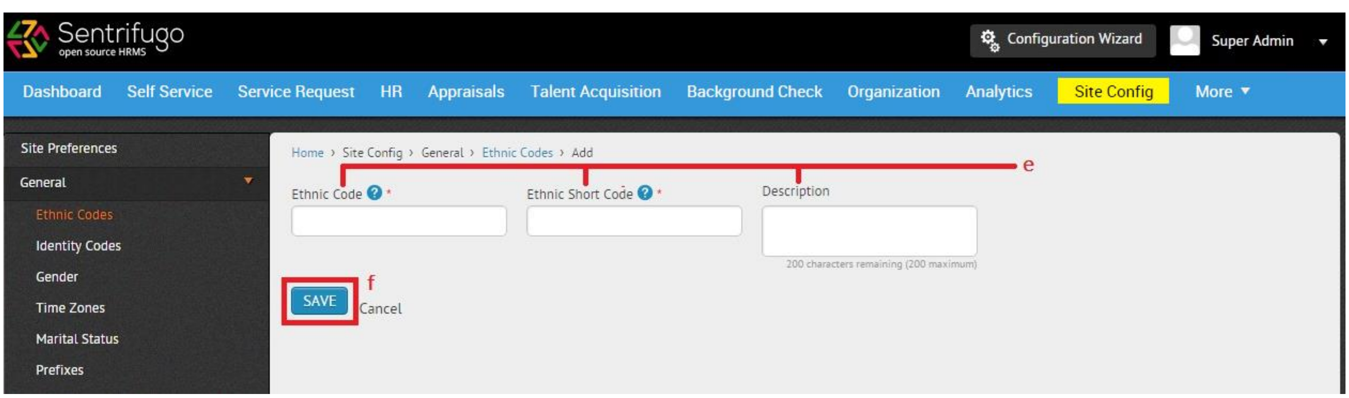


Figure 4.1

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

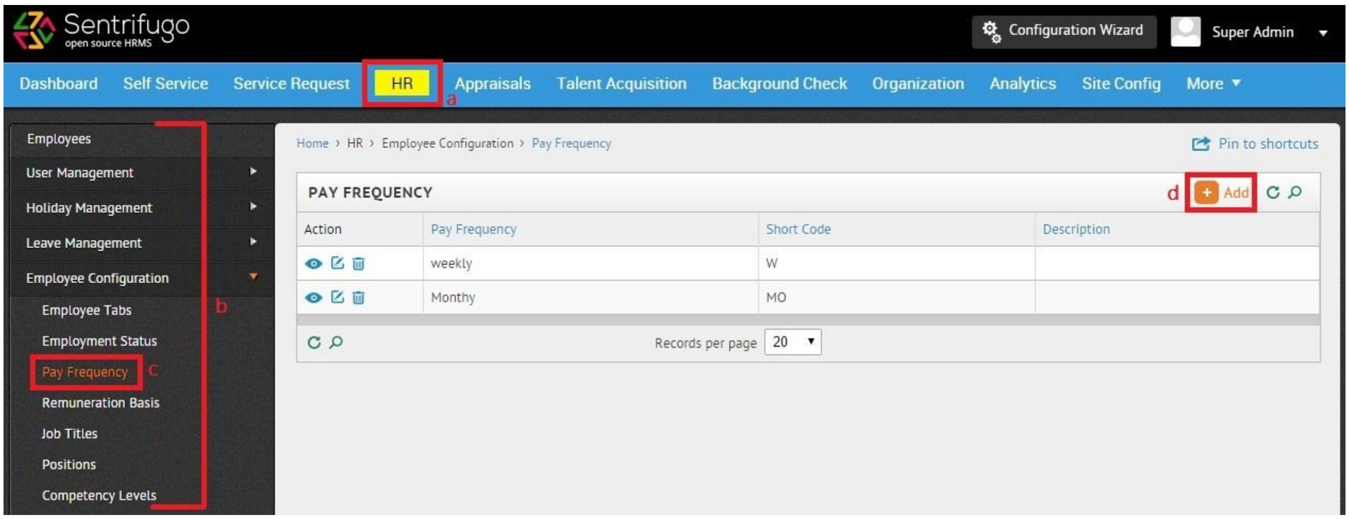


Figure 5

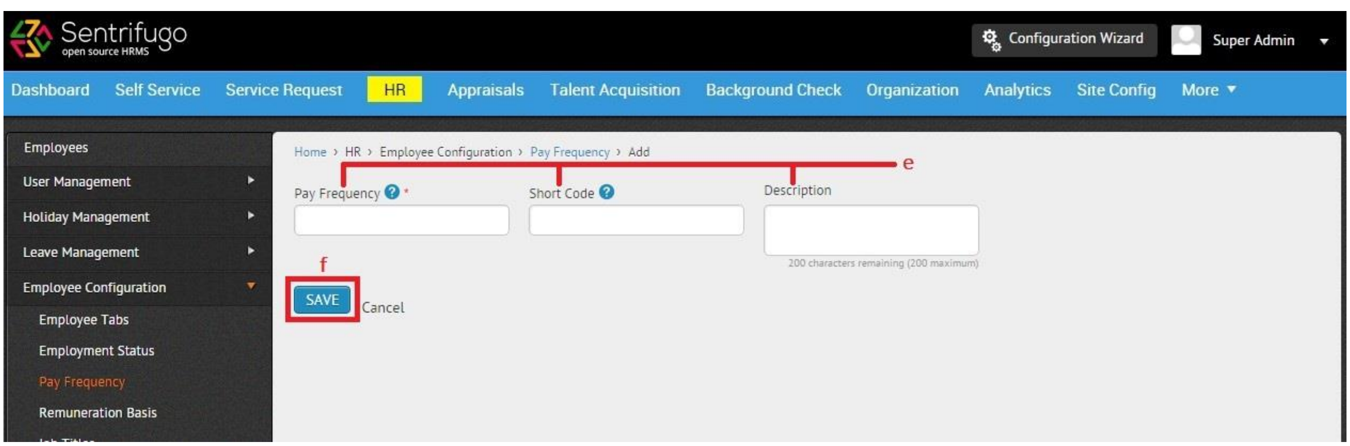


Figure 5.1

Configure Tabs for Employees

a. Click on HR 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
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

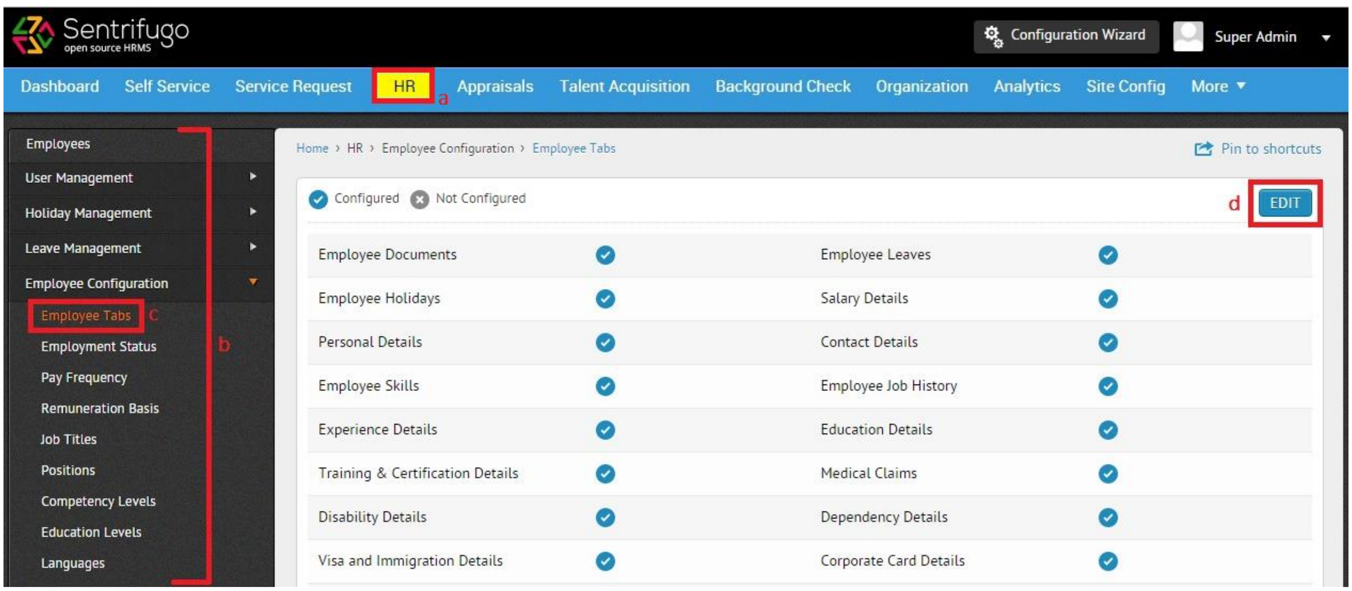


Figure 6

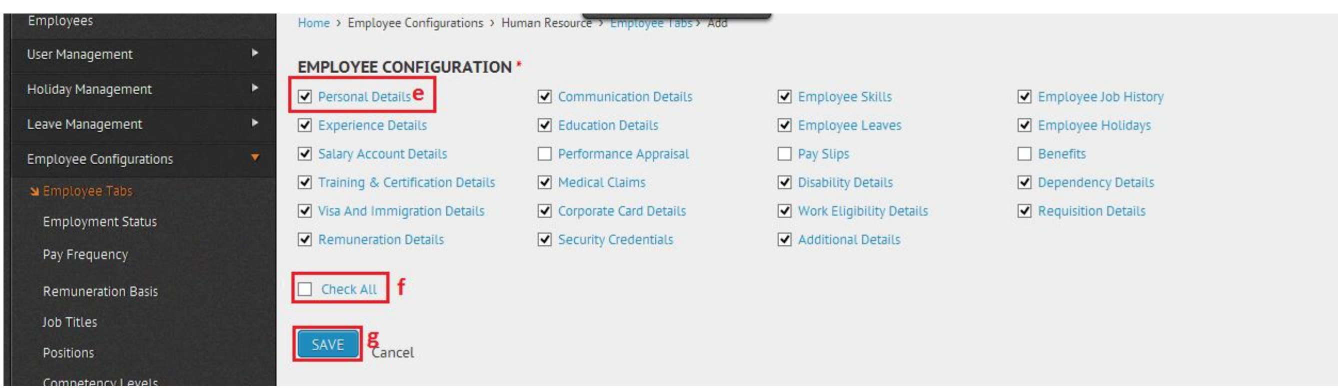


Figure 6.1

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
e. Enter the required details
f. Upload your organization logo
g. Click on save after filling in all the details.

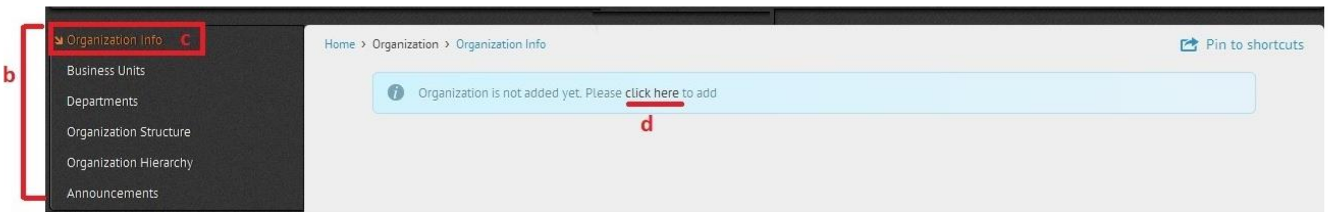


Figure 7

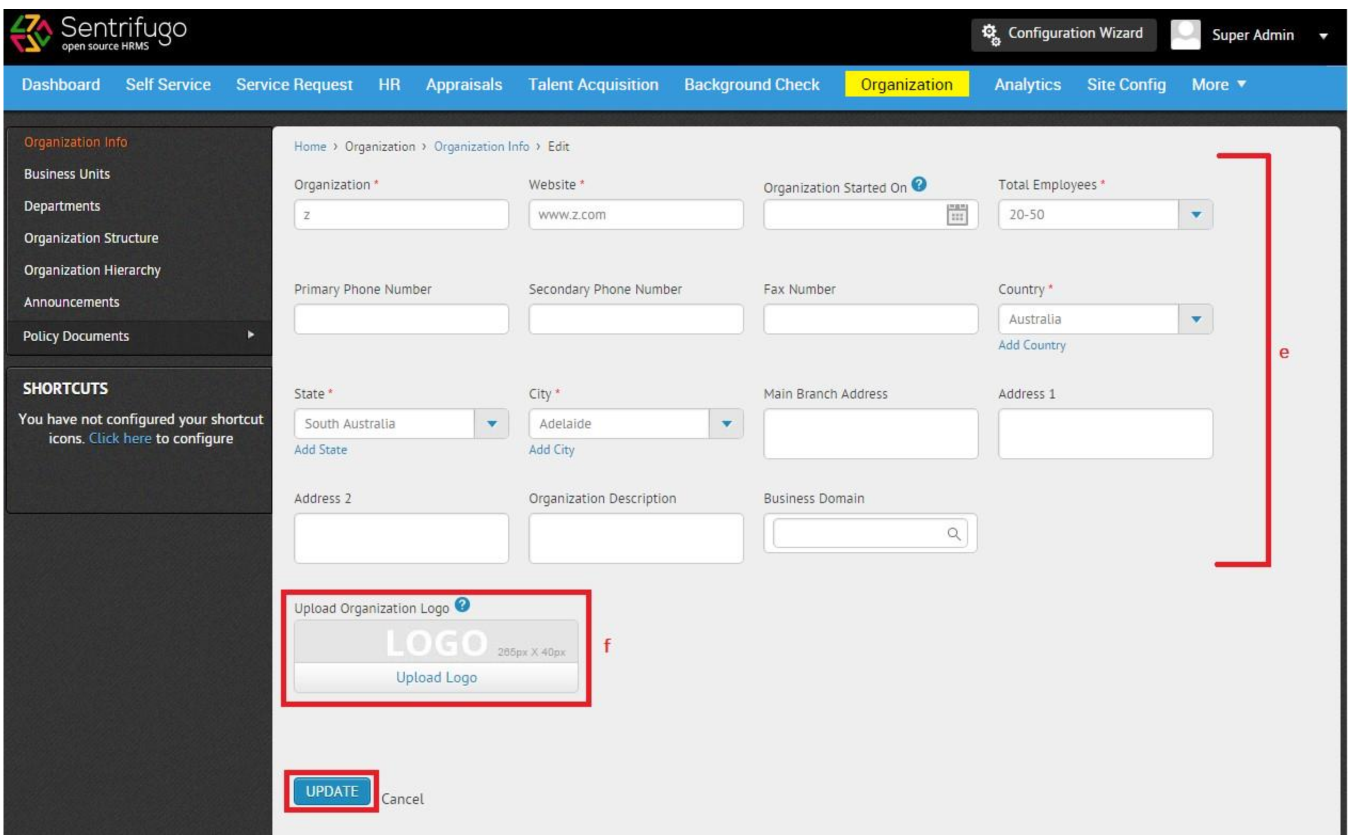


Figure 7.1

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

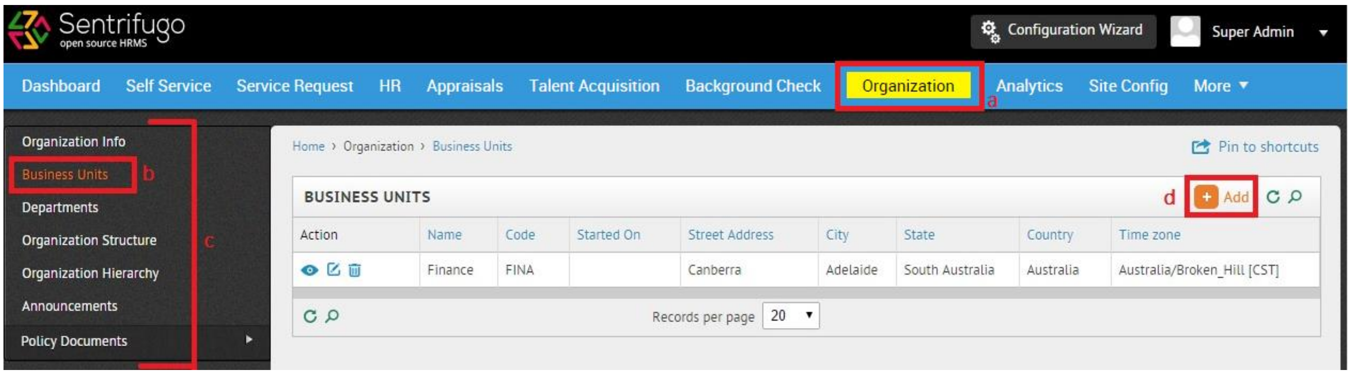


Figure 8

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

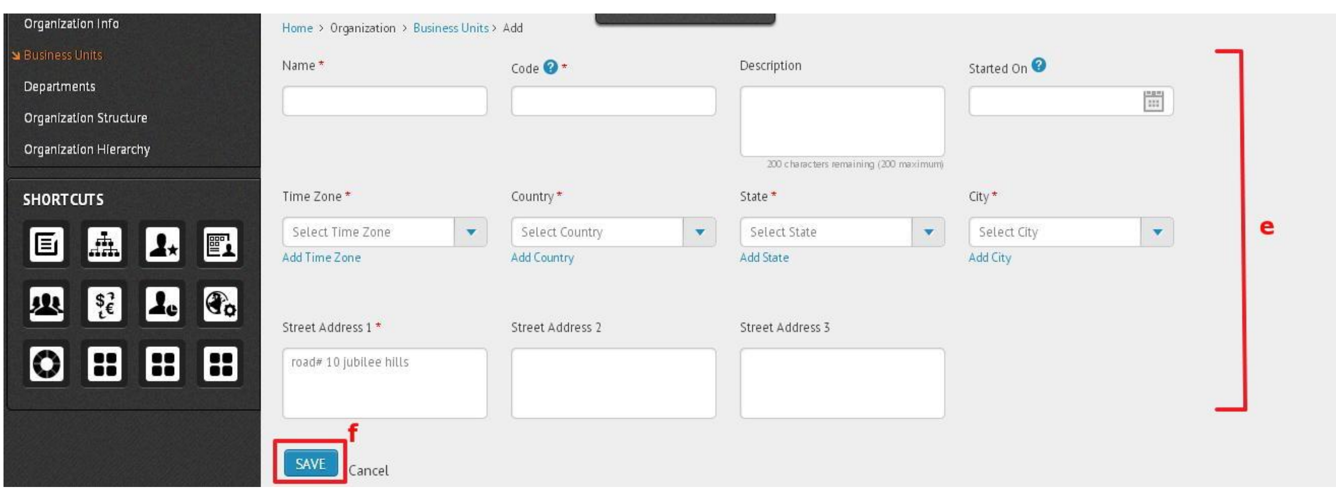


Figure 8.1

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

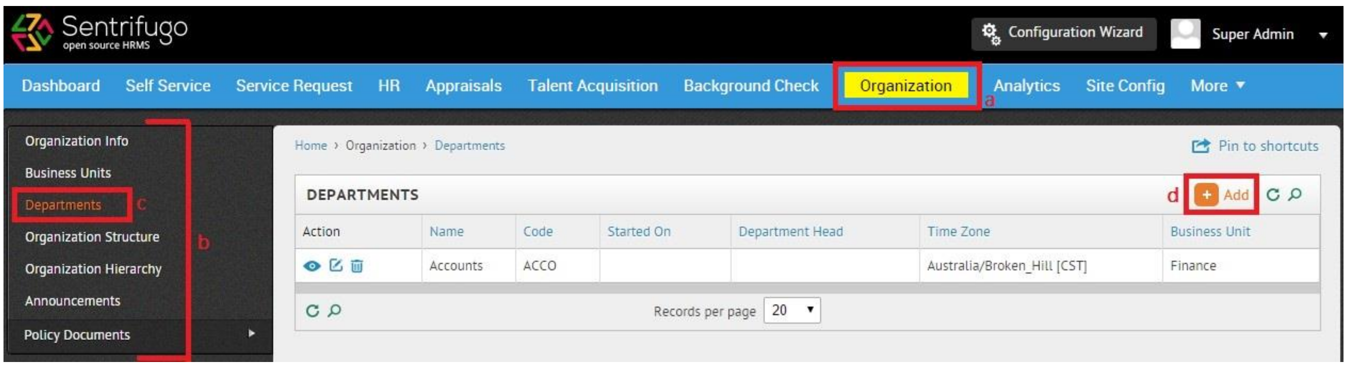


Figure 9

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

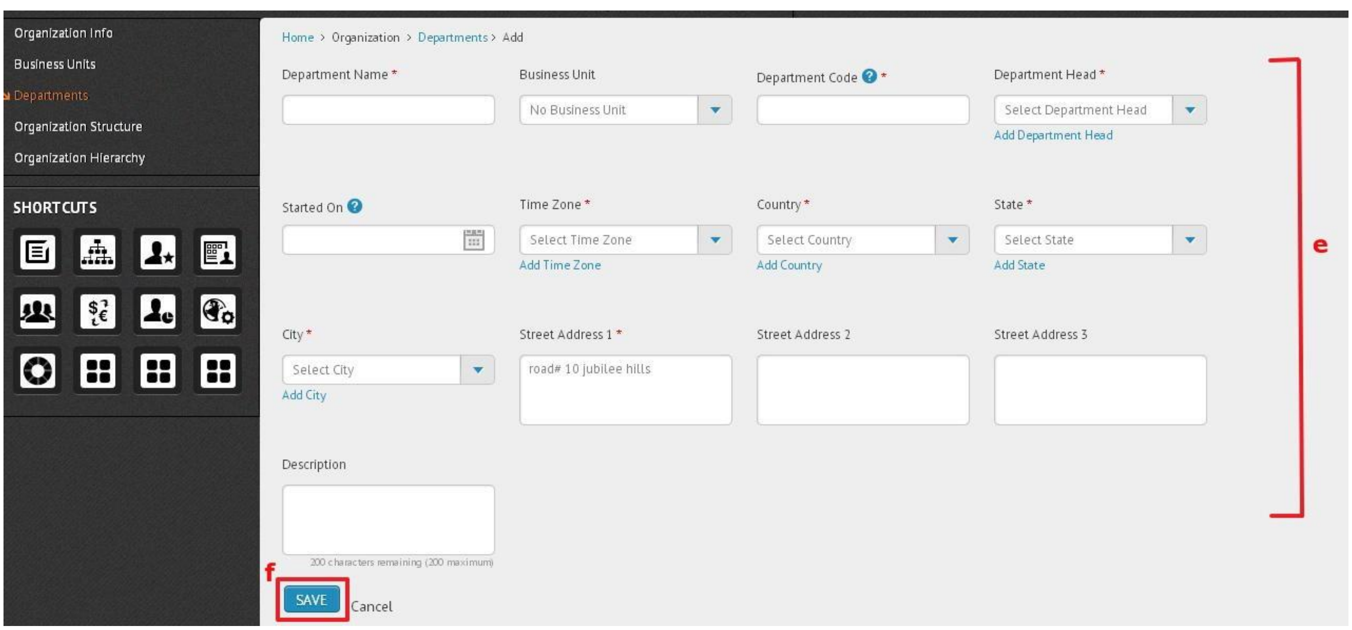


Figure 9.1

Set Site Preferences

a. Click on Site Config 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

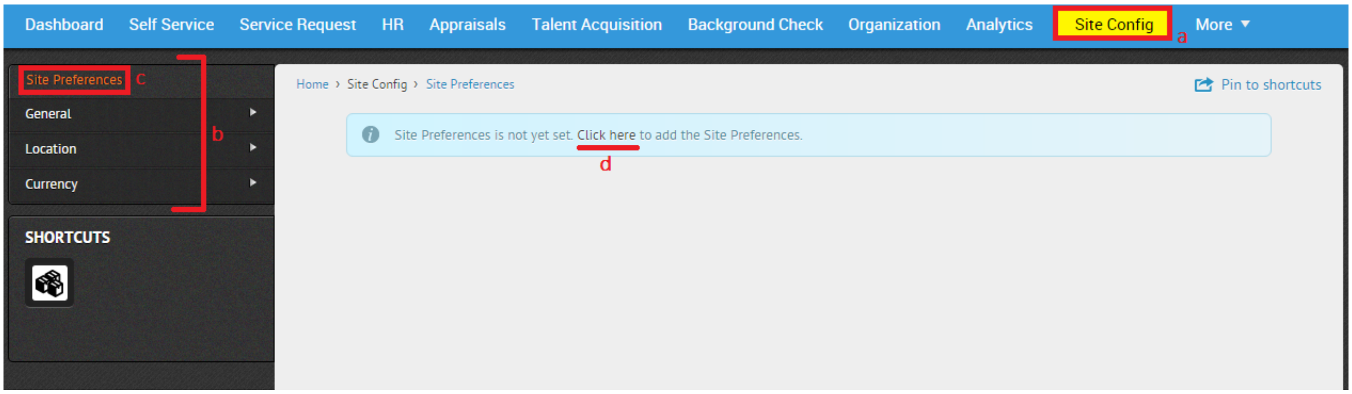


Figure 10

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

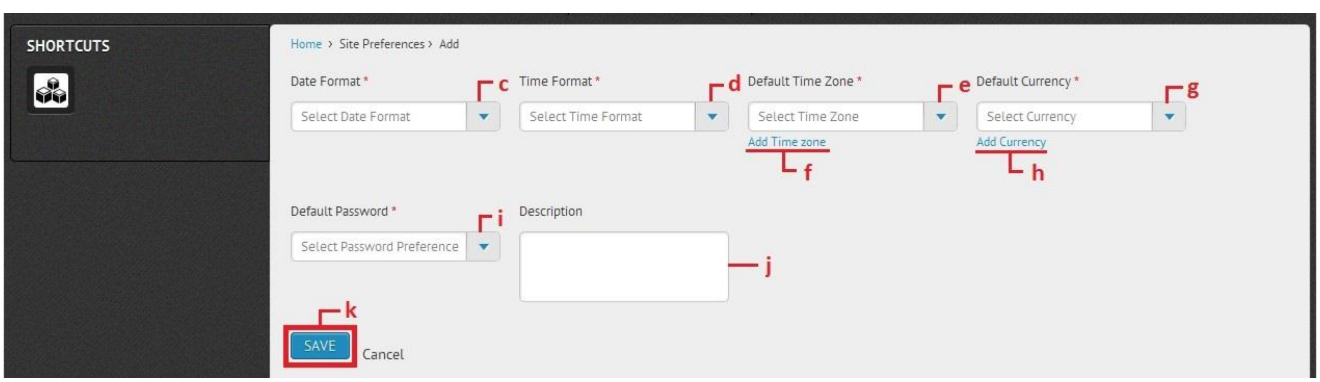


Figure 10.1

Activate and In-activate Modules

a. Click on 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

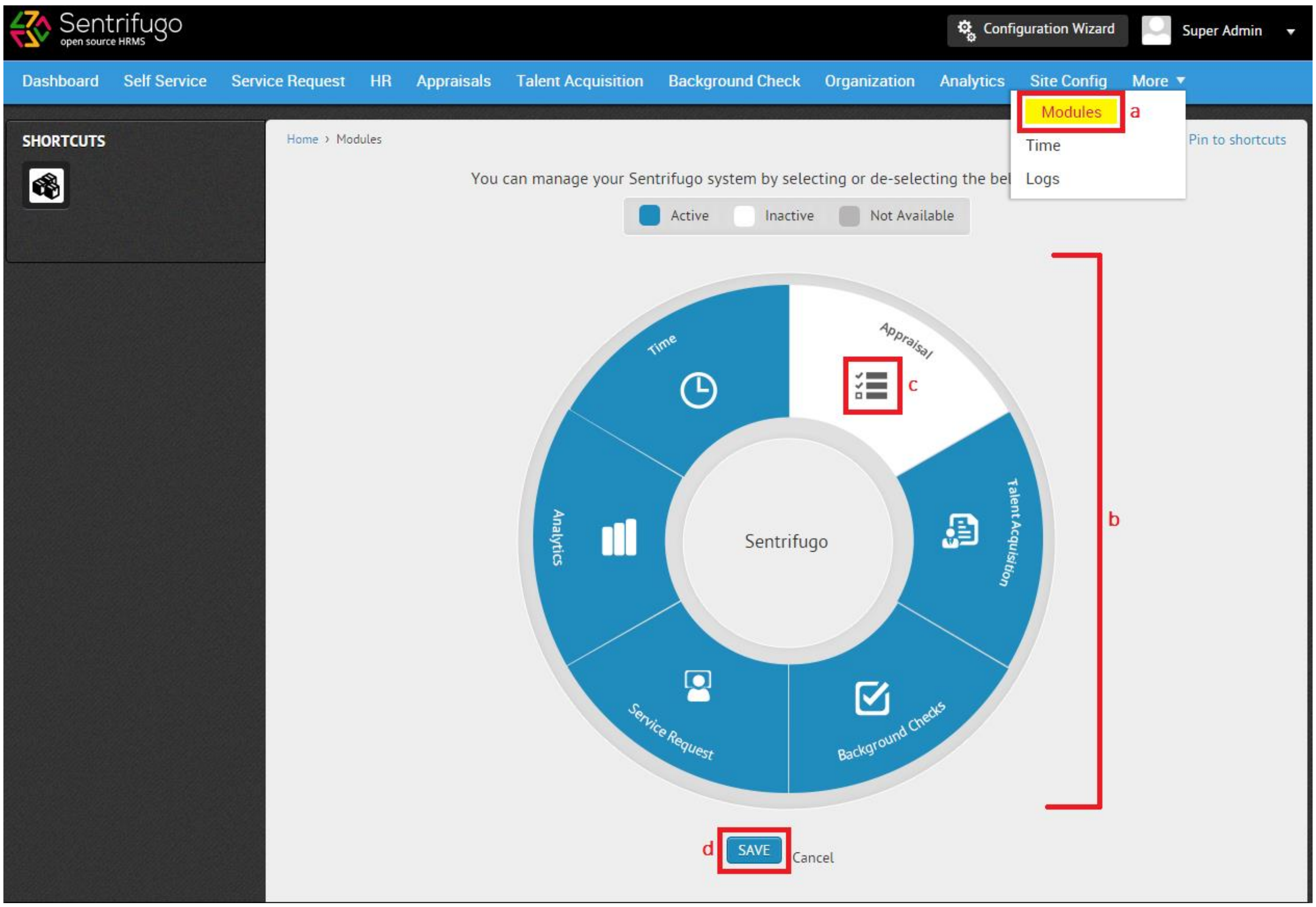


Figure 11

Add Roles & Privileges

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

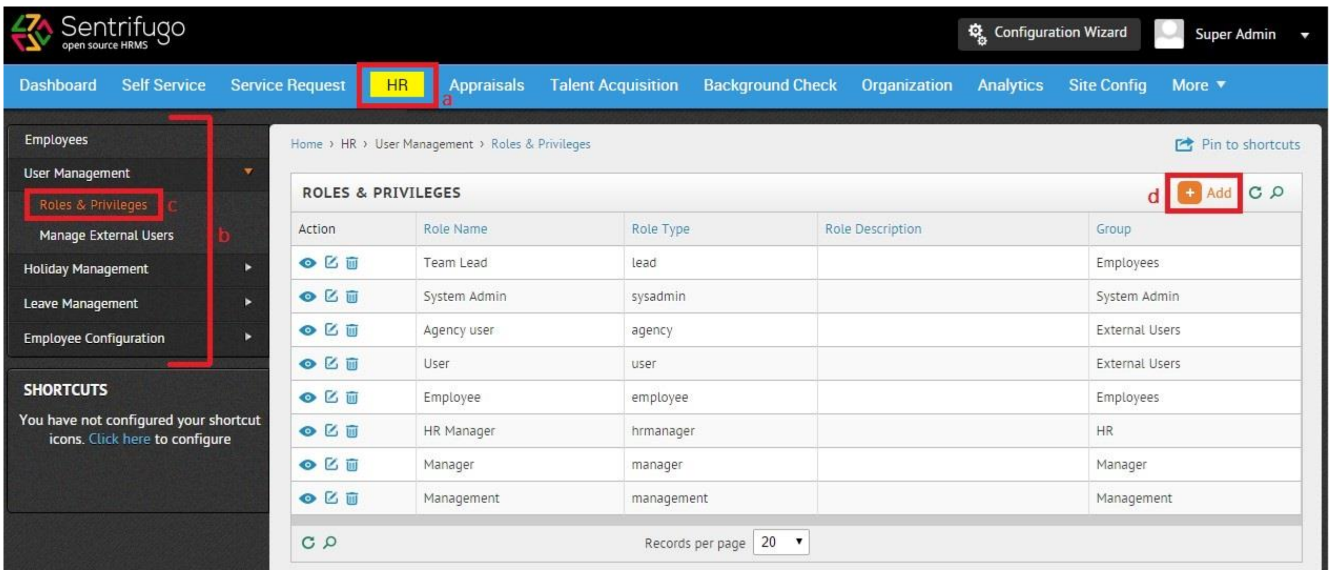


Figure 12

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 12.1

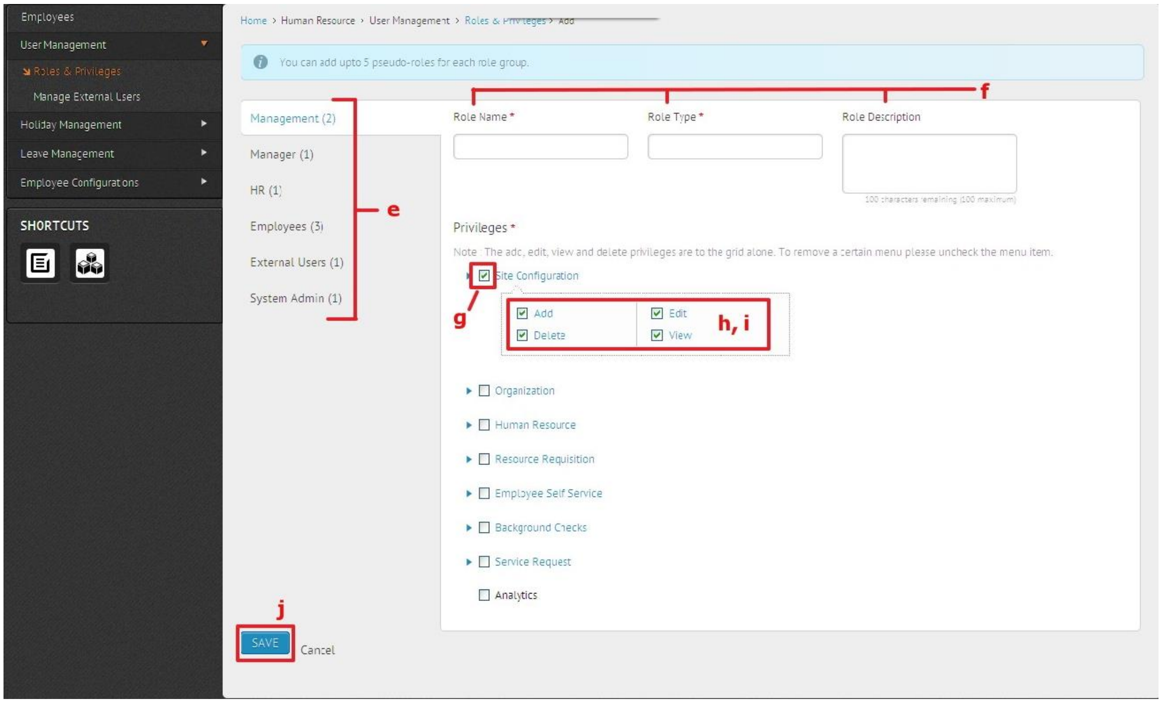


Figure 12.1

Add an External User

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

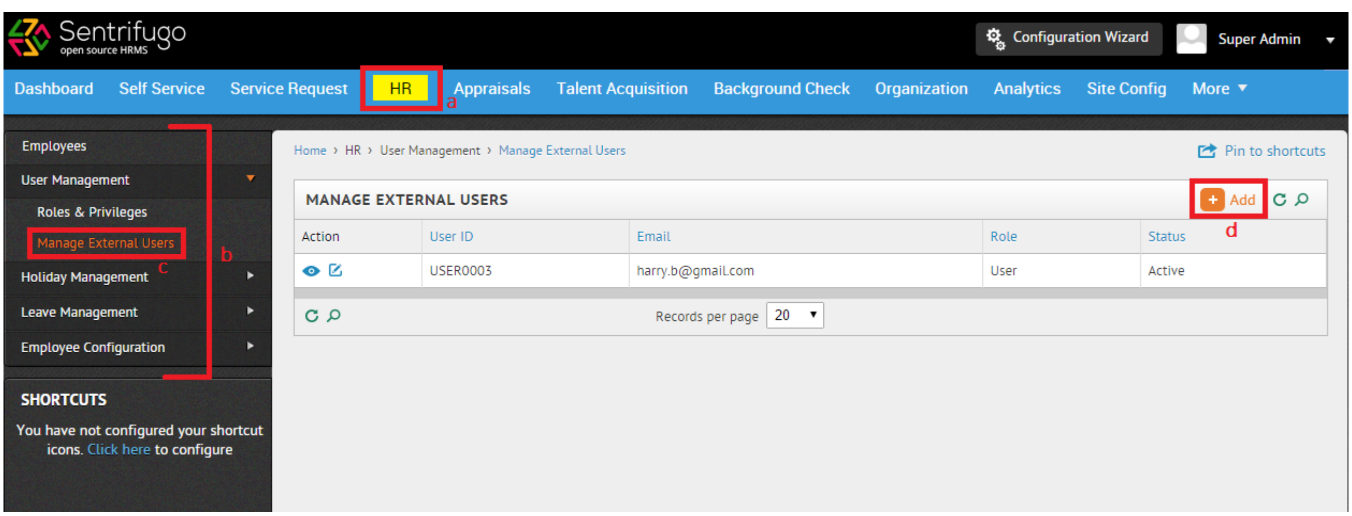


Figure 12.2

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

Figure 12.3

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. (This is already done in the 'Add Employee' option in the configuration wizard)

Note: Only after the management details are gathered and the first employee (Head of Organization, Employee #2) is added, the privilege to add employees to the application will be enabled.

a. Click on Human Resources in the top menu
b. Click on Employees submenu on the left side panel
c. Click on Add button in the right side panel

Refer Figure 13

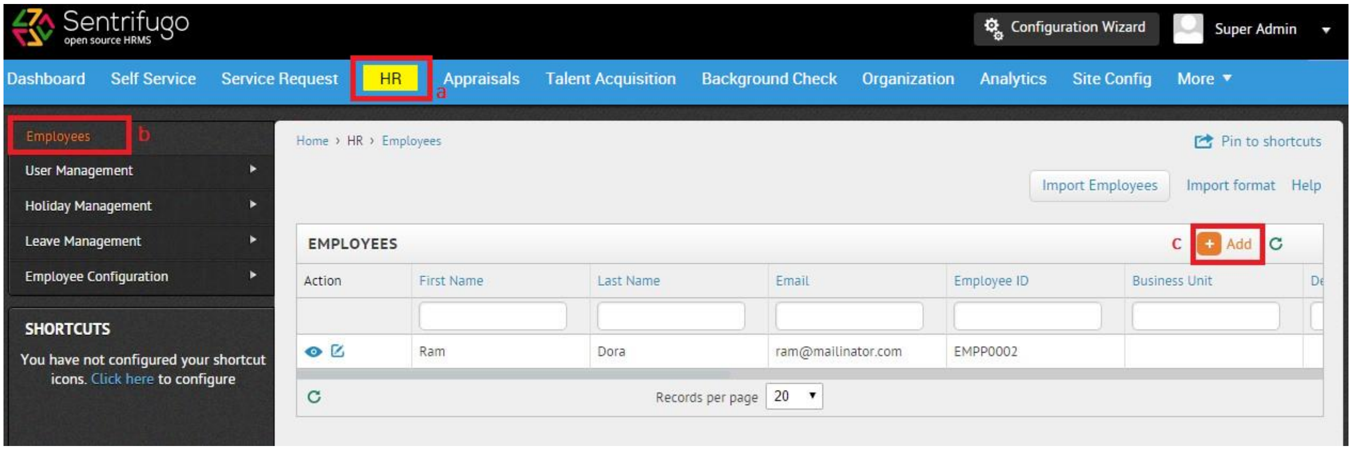


Figure 13

d. The Employee ID will be auto generated by the application
e. Enter the details respective to the employee
f. Click on Save to add the employee

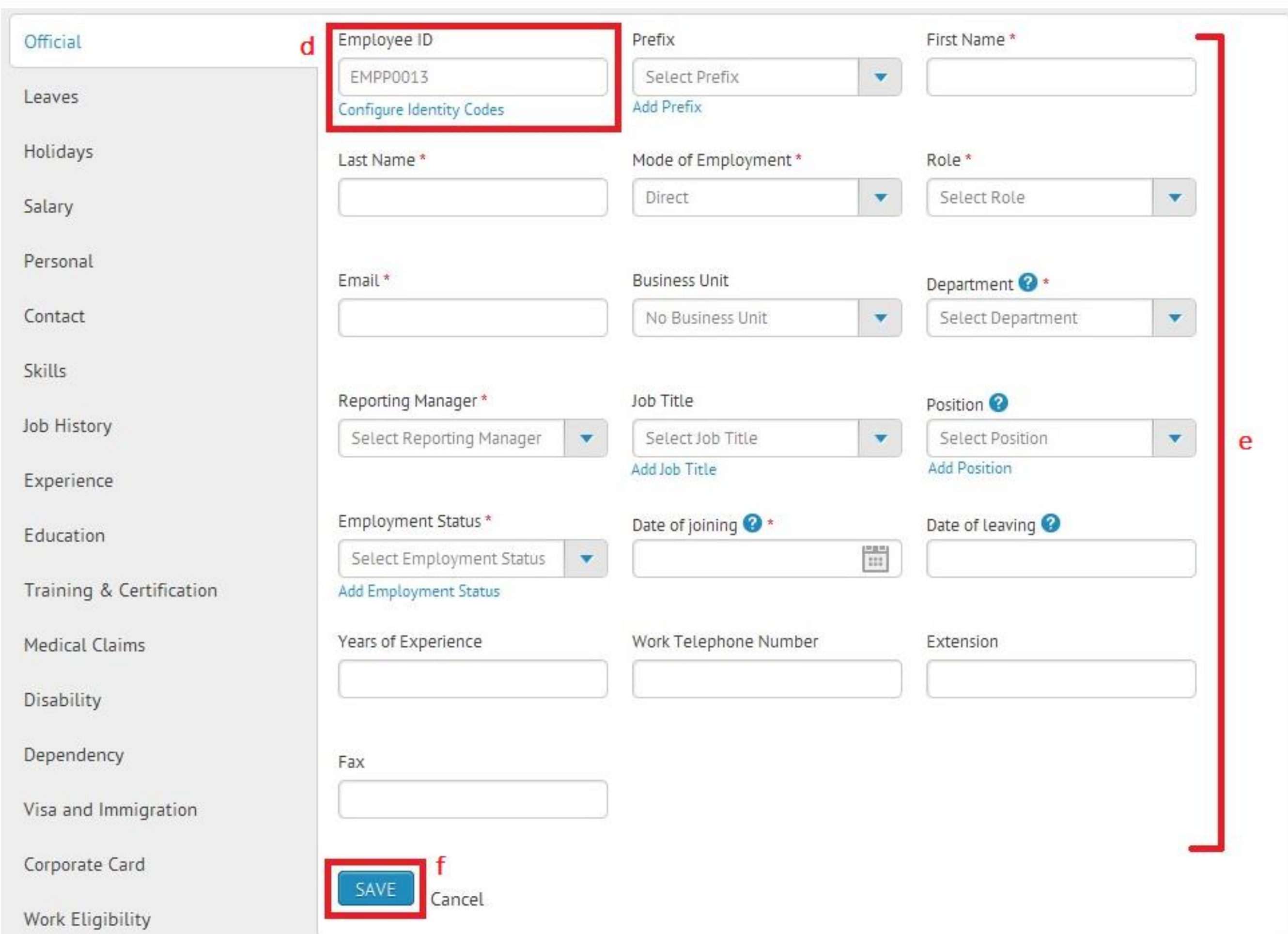


Figure 13.1

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

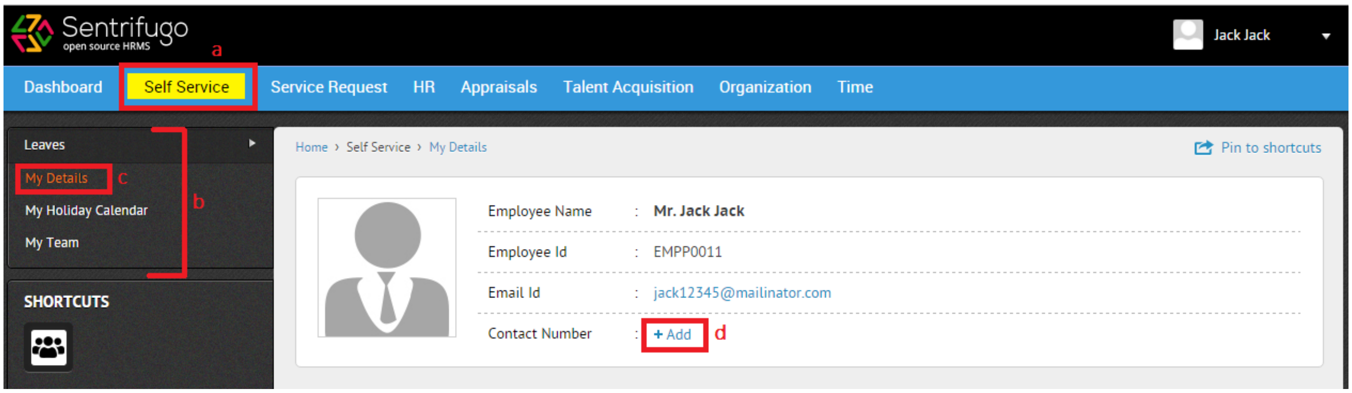


Figure 14

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

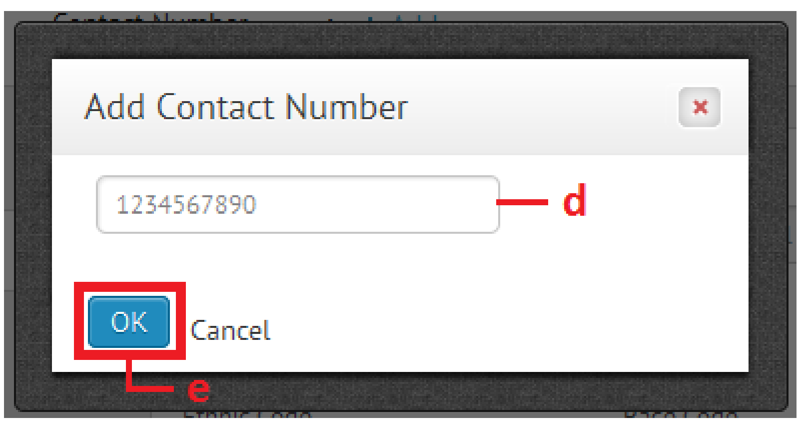


Figure 14.1

Click on the desired tab in the right side panel to add or edit details

f. Click on Edit in the respective screen to add or edit the details
g. Click on Save to add or update the details

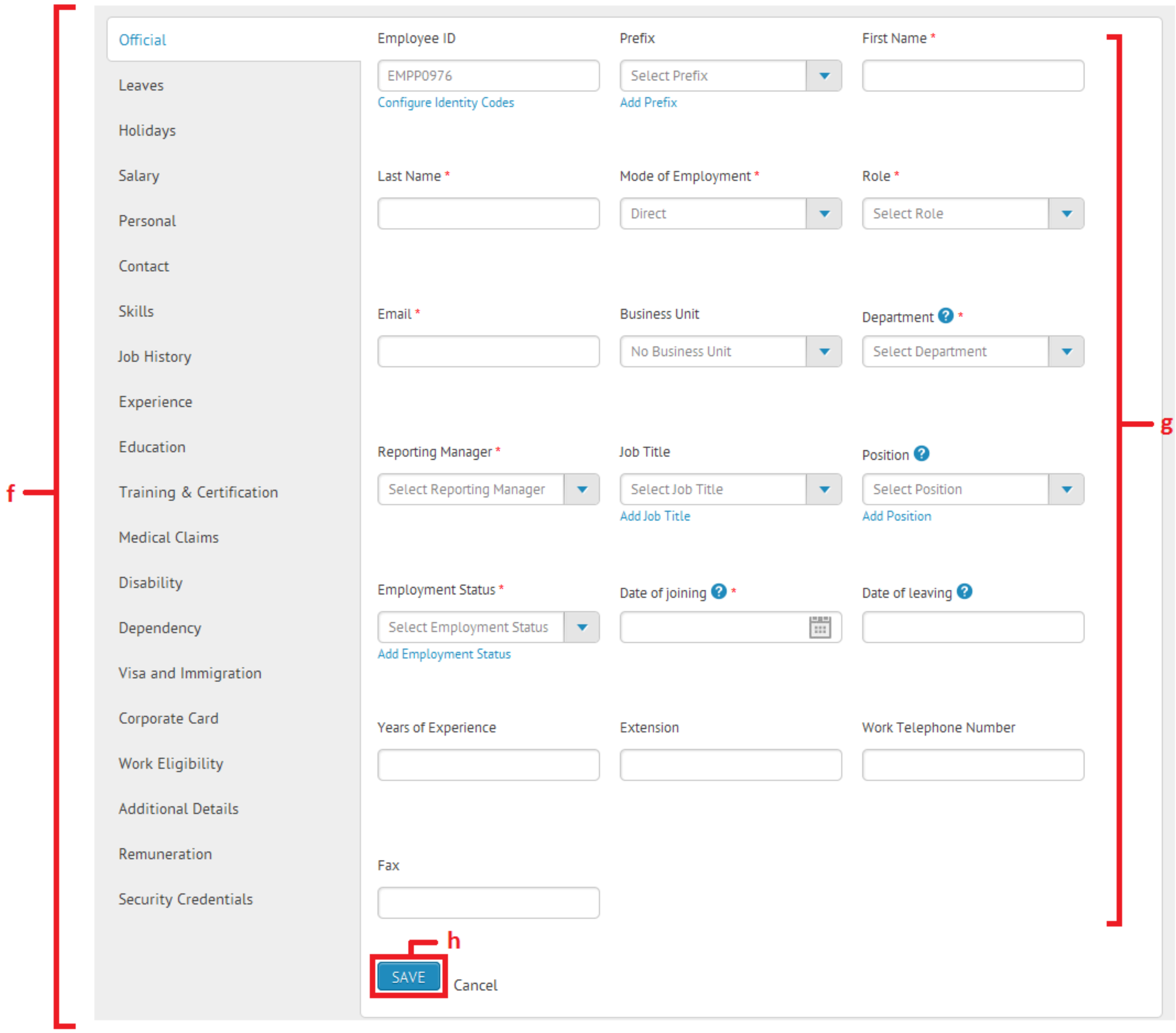


Figure 14.2

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 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

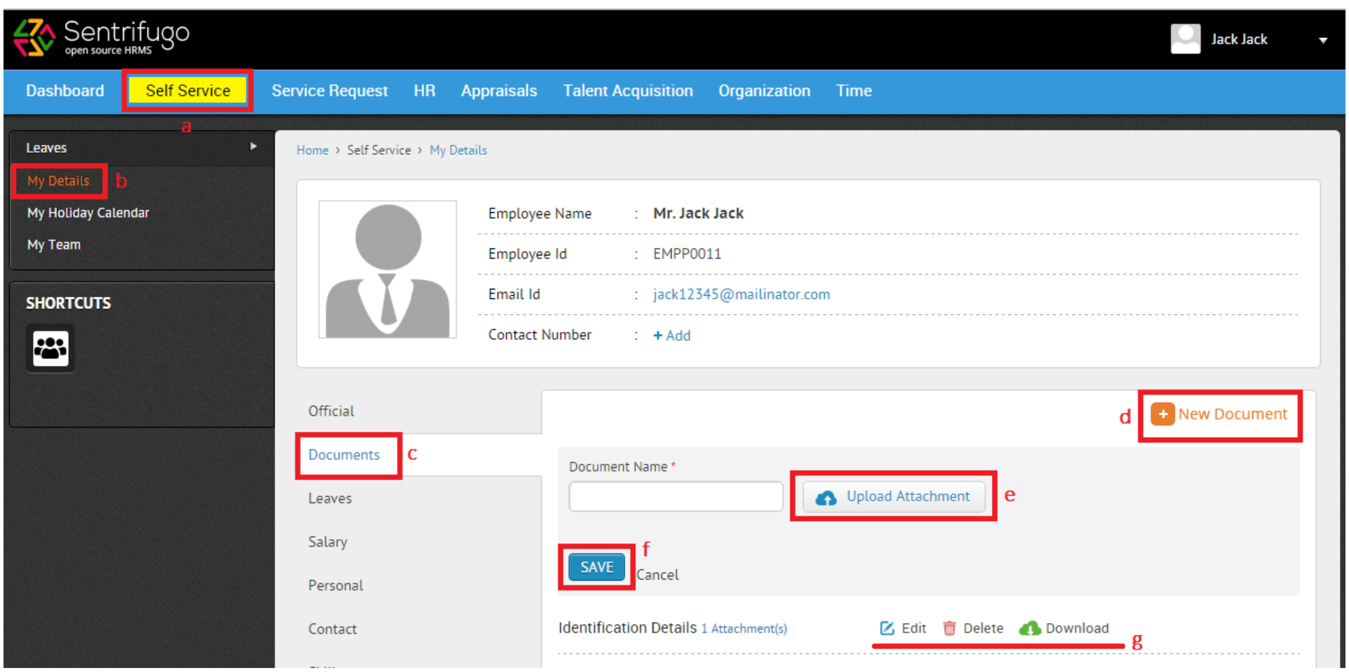


Figure 15

Add Leave Management Options

a. Click on HR 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

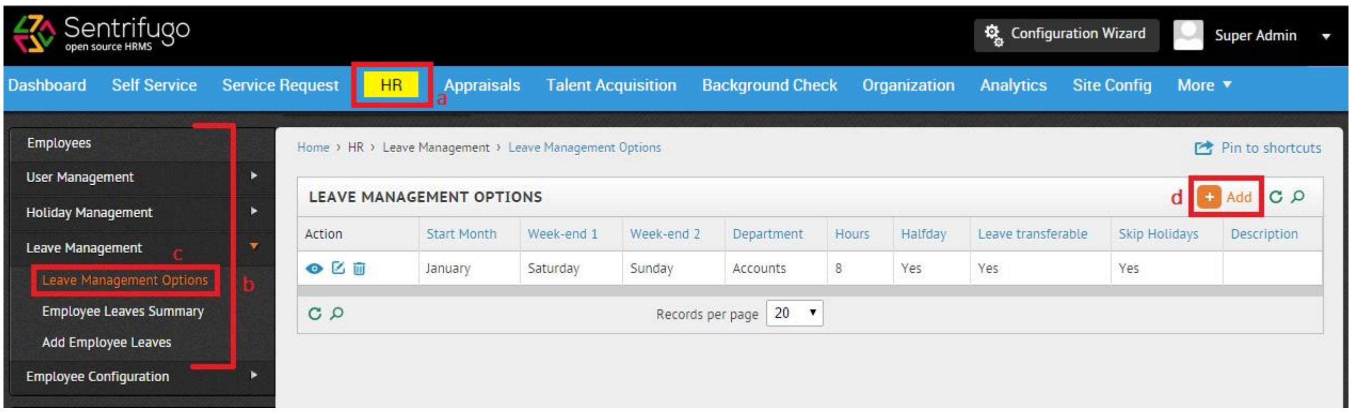


Figure 16

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

Refer figure 16.1

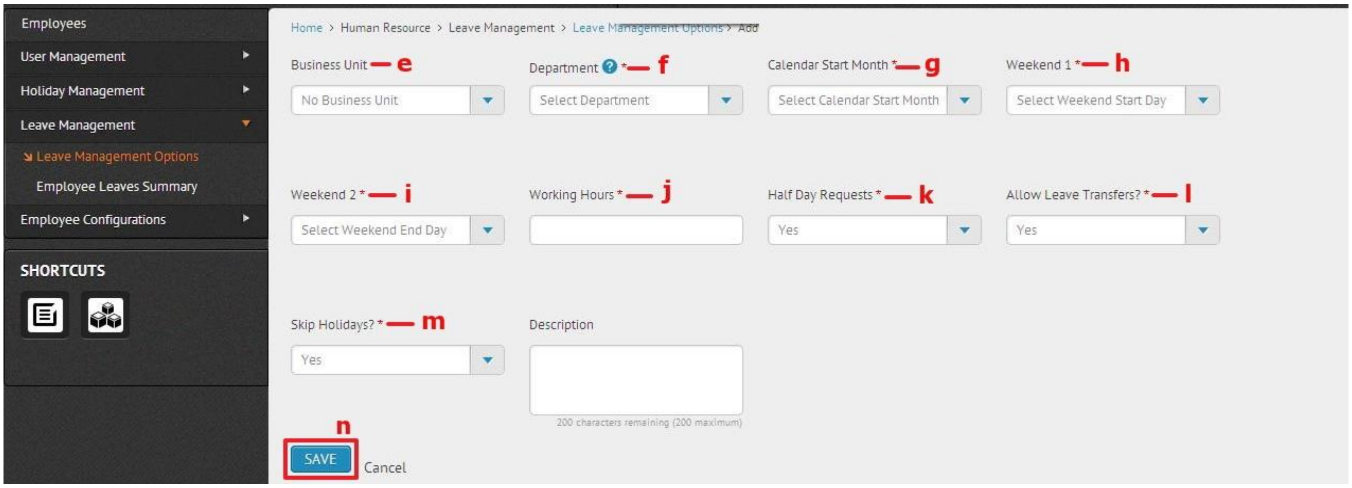


Figure 16.1

Apply for 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
g. View your leaves for a particular month. For users (Manager/HR/Management) who have employees reporting to them, they can view their leave details also.
h. Apply for leave directly by clicking here. The date is set by default to the current date but it can be changed.

Refer Figure 17

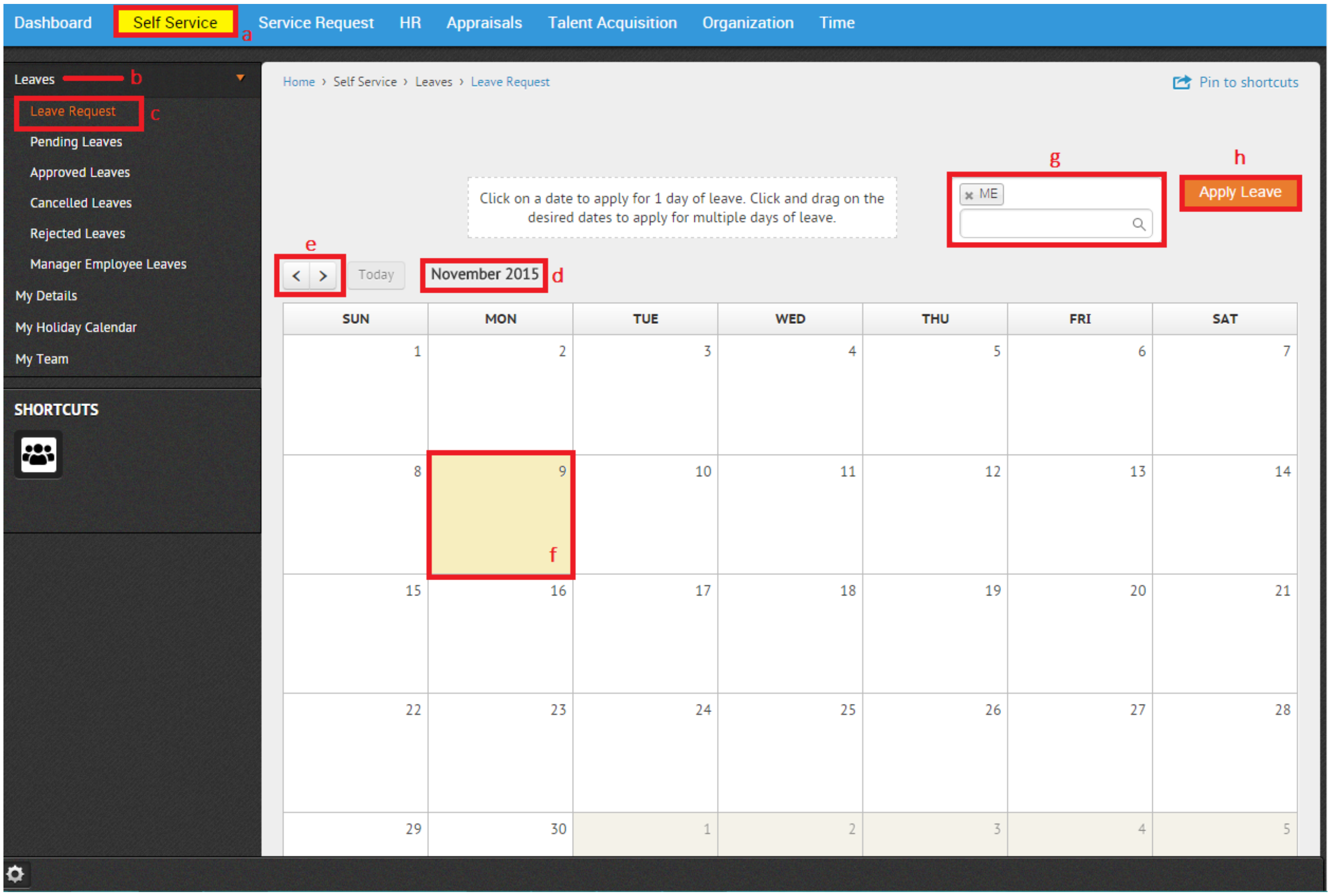


Figure 17

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

Refer Figure 17.1

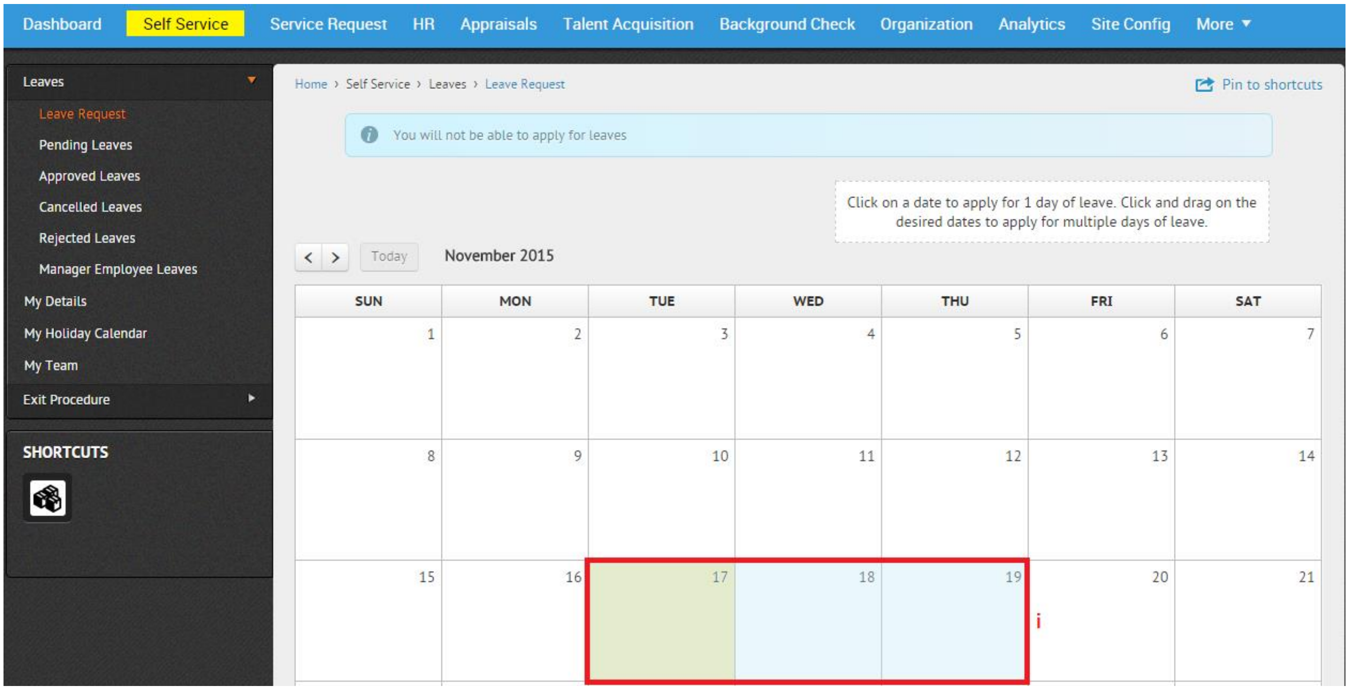


Figure 17.1

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

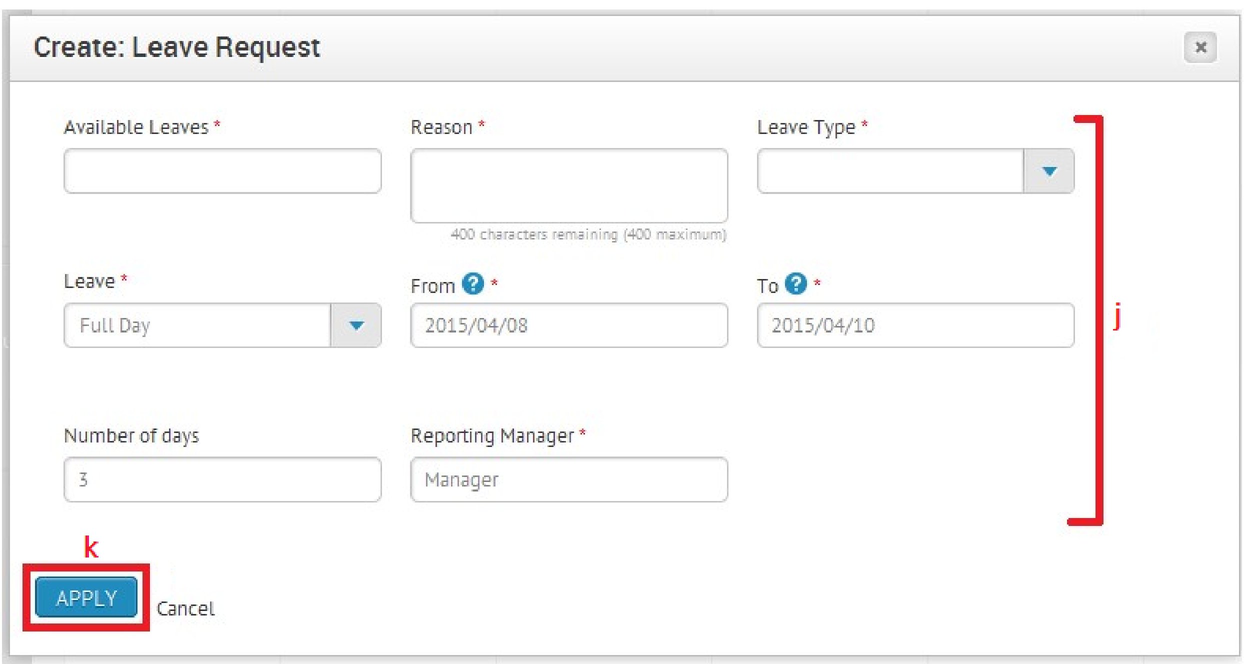


Figure 17.2

A **manager** will be able to view all the employees' leaves (only those who report to him/her) when he/she selects the option 'Employee reporting to me'.

j. Click on the option 'Employee Reporting To Me' to view all employees leaves

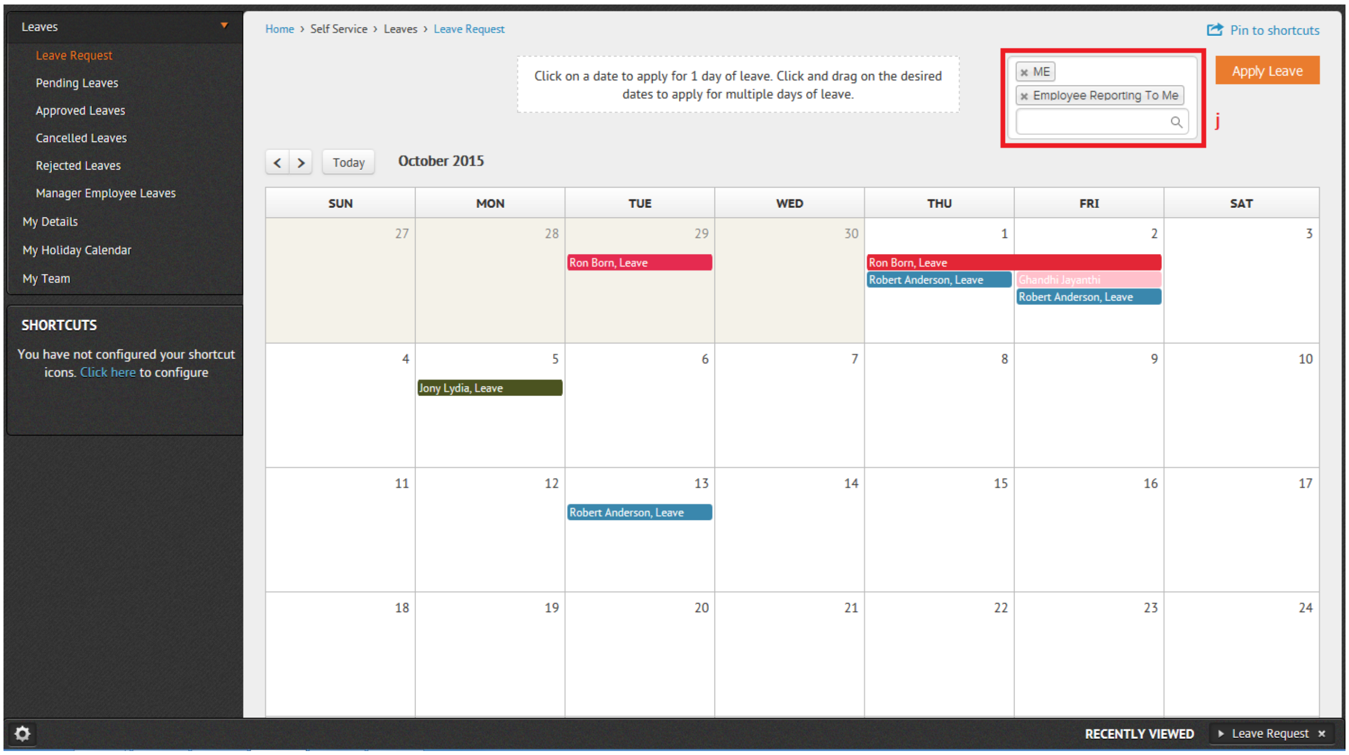


Figure 17.3

Cancel my Leave Request

a. Click on 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

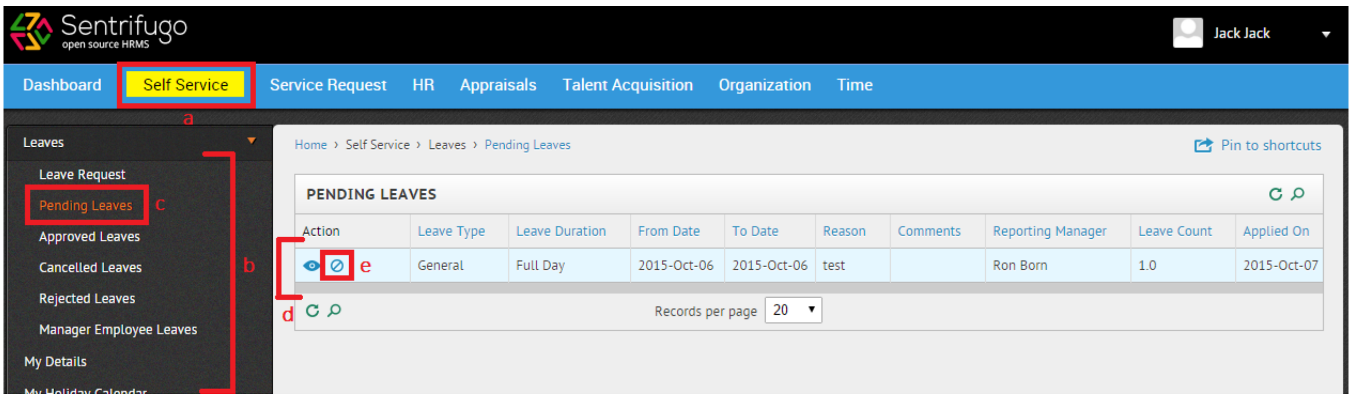


Figure 17.4

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

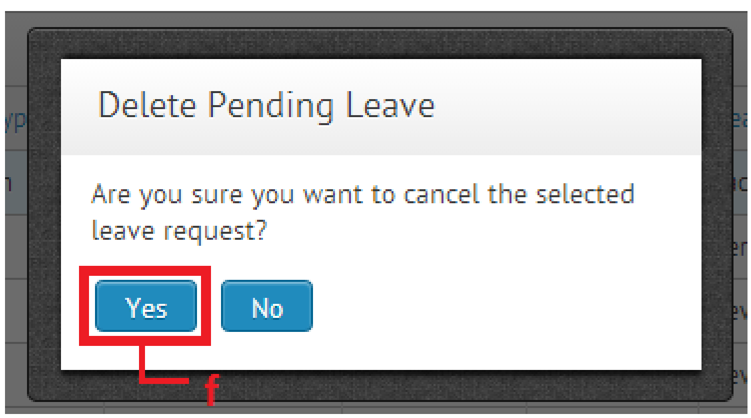


Figure 17.5

Approve or Reject Leave Requests

a. Click on 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

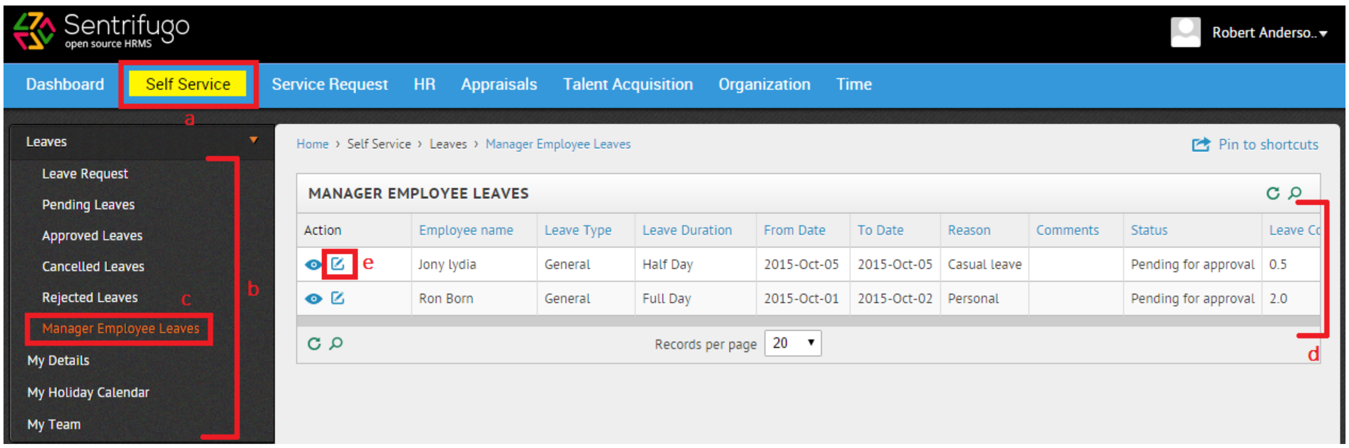


Figure 17.6

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

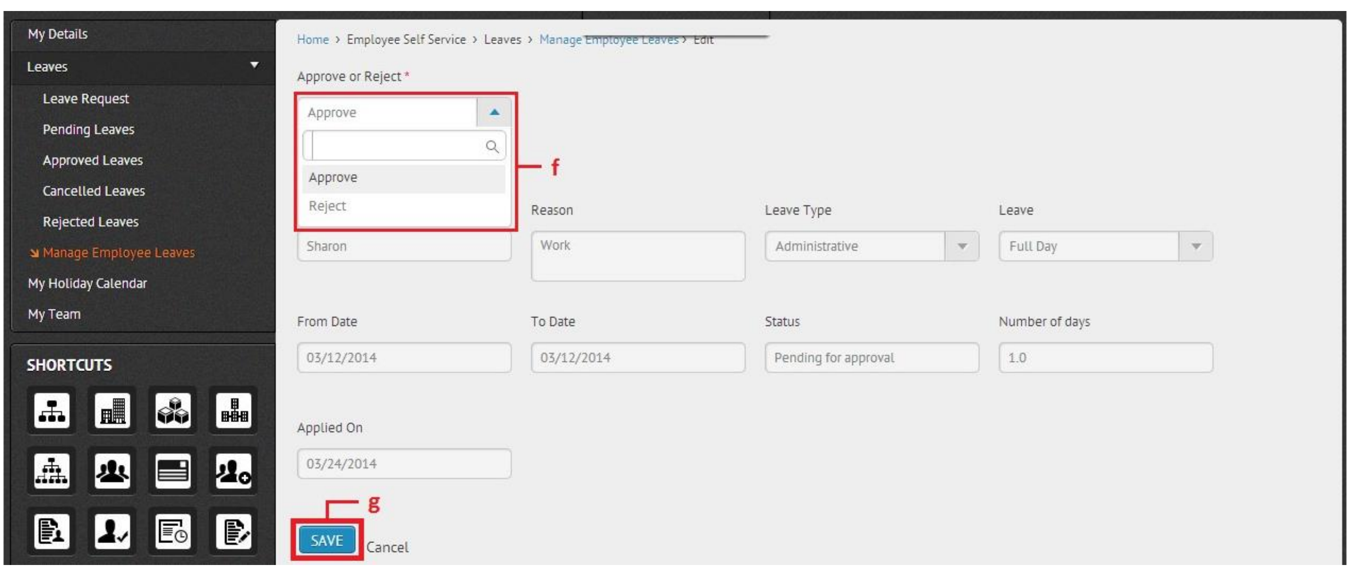


Figure 17.7

Create an opening for a requisition

a. Click on Talent Acquisition 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

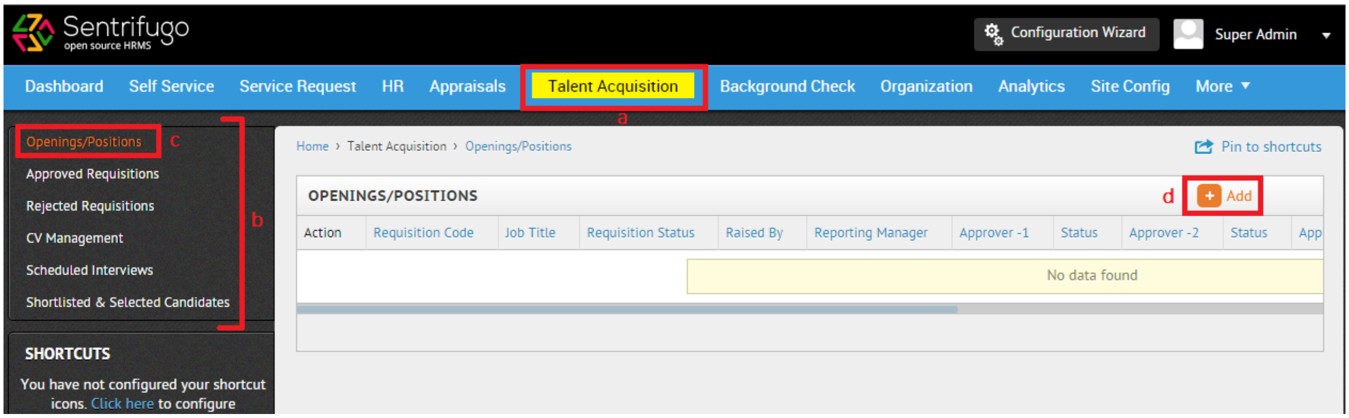


Figure 18

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 18.1

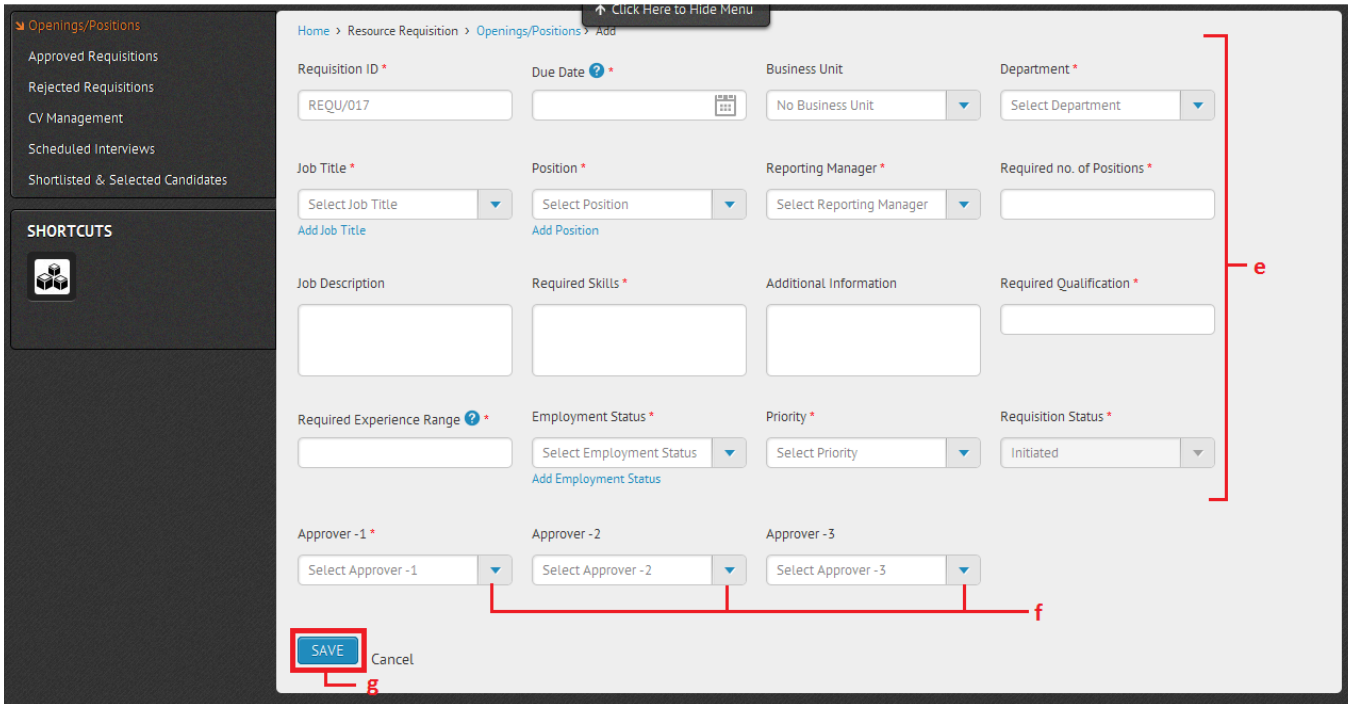


Figure 18.1

Add Screening Type for Background Checks

a. Click on Background Check 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

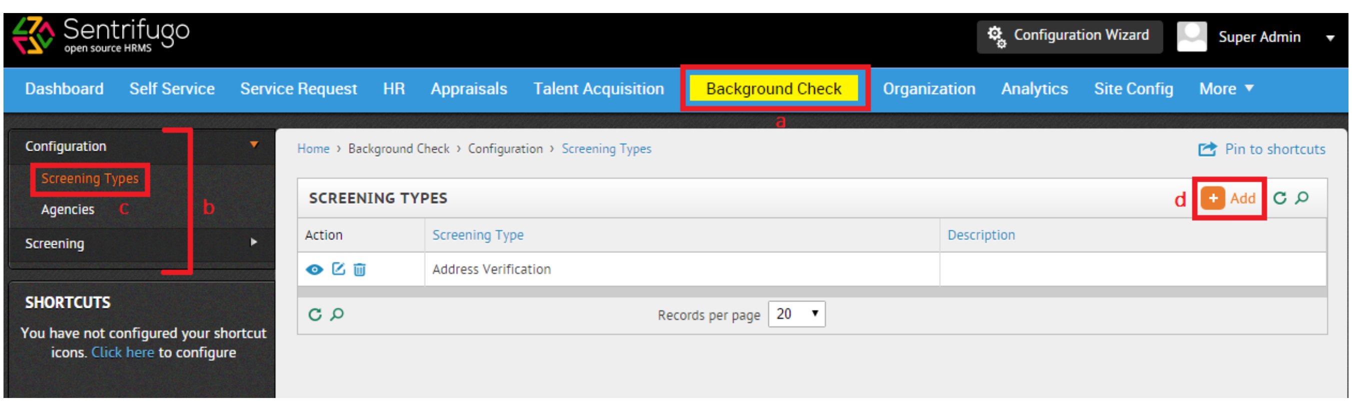


Figure 18.2

a. Enter the Screening Type and Description if necessary
b. Click on Save button to add the Screening Type

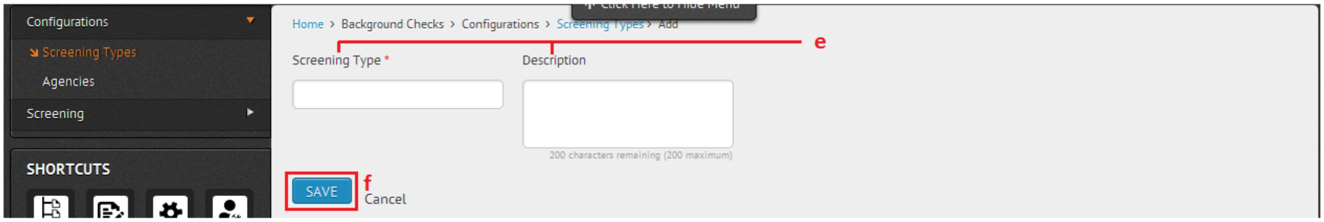


Figure 18.3

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

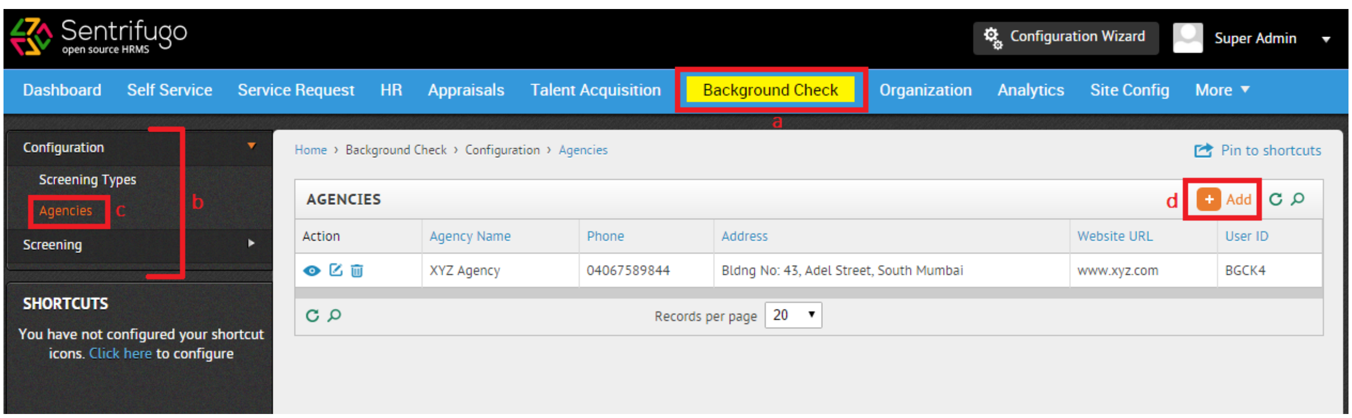


Figure 18.4

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

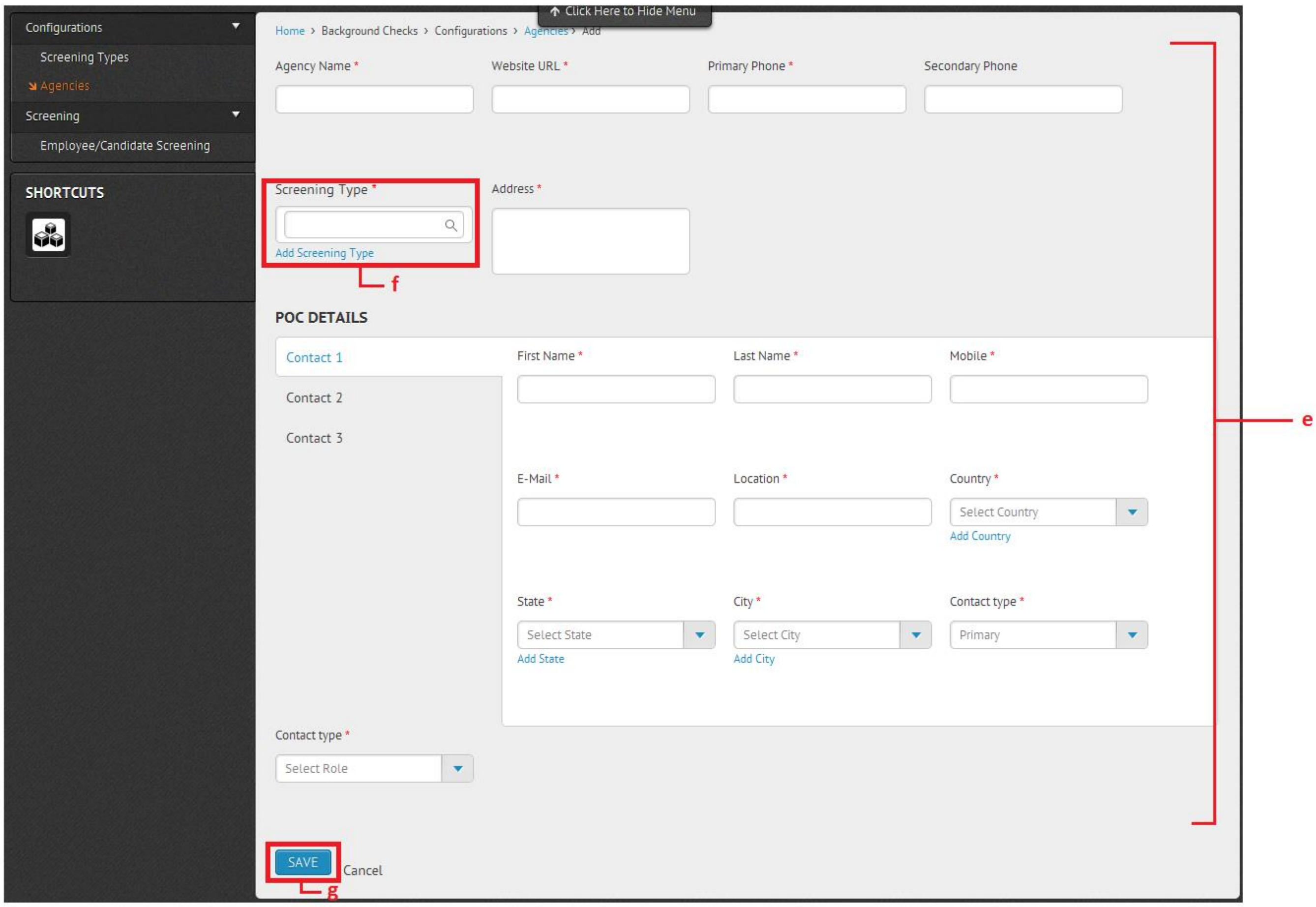


Figure 18.5

Send a current employee for Background Check

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

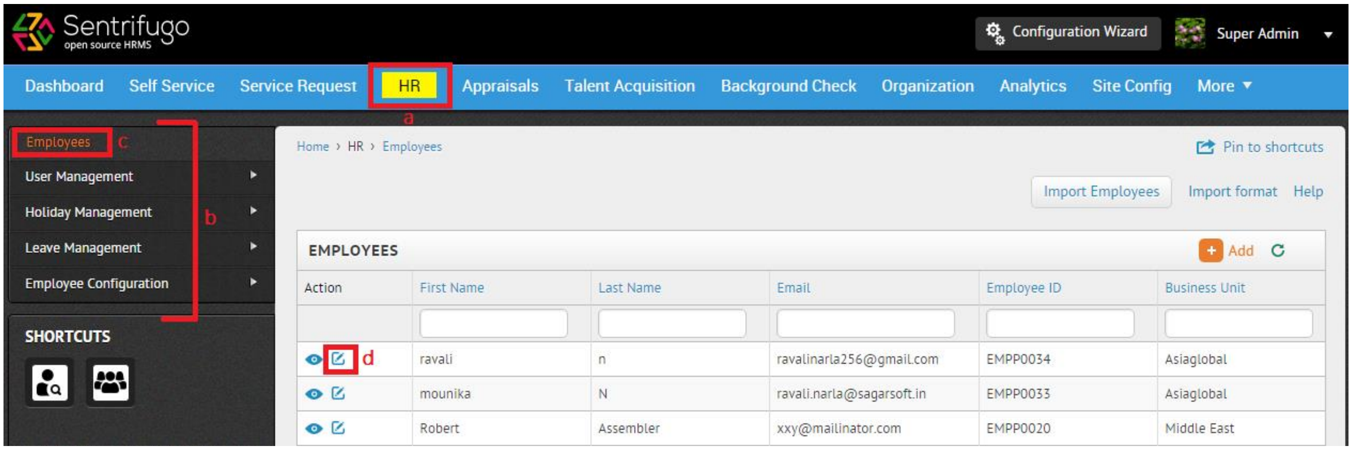


Figure 18.6

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

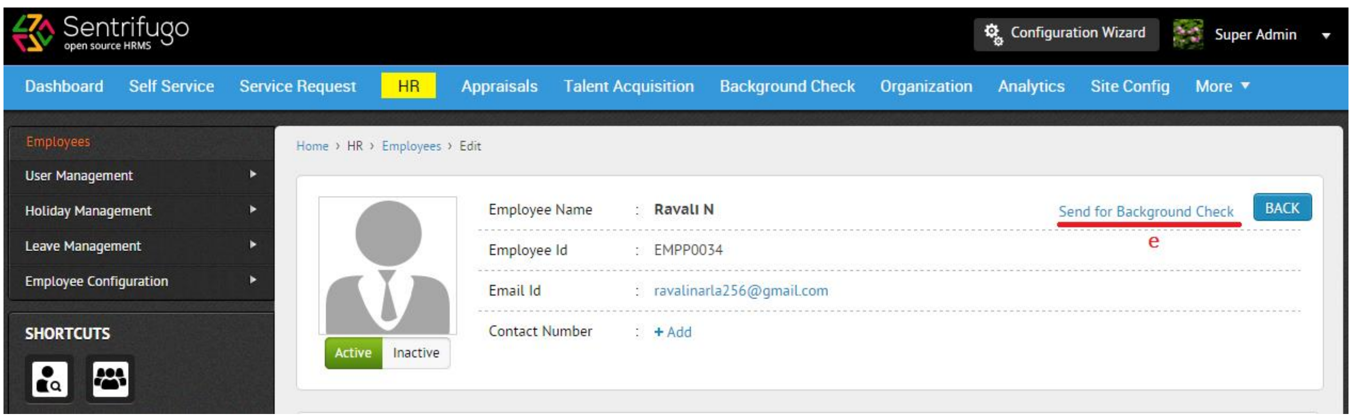


Figure 18.7

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

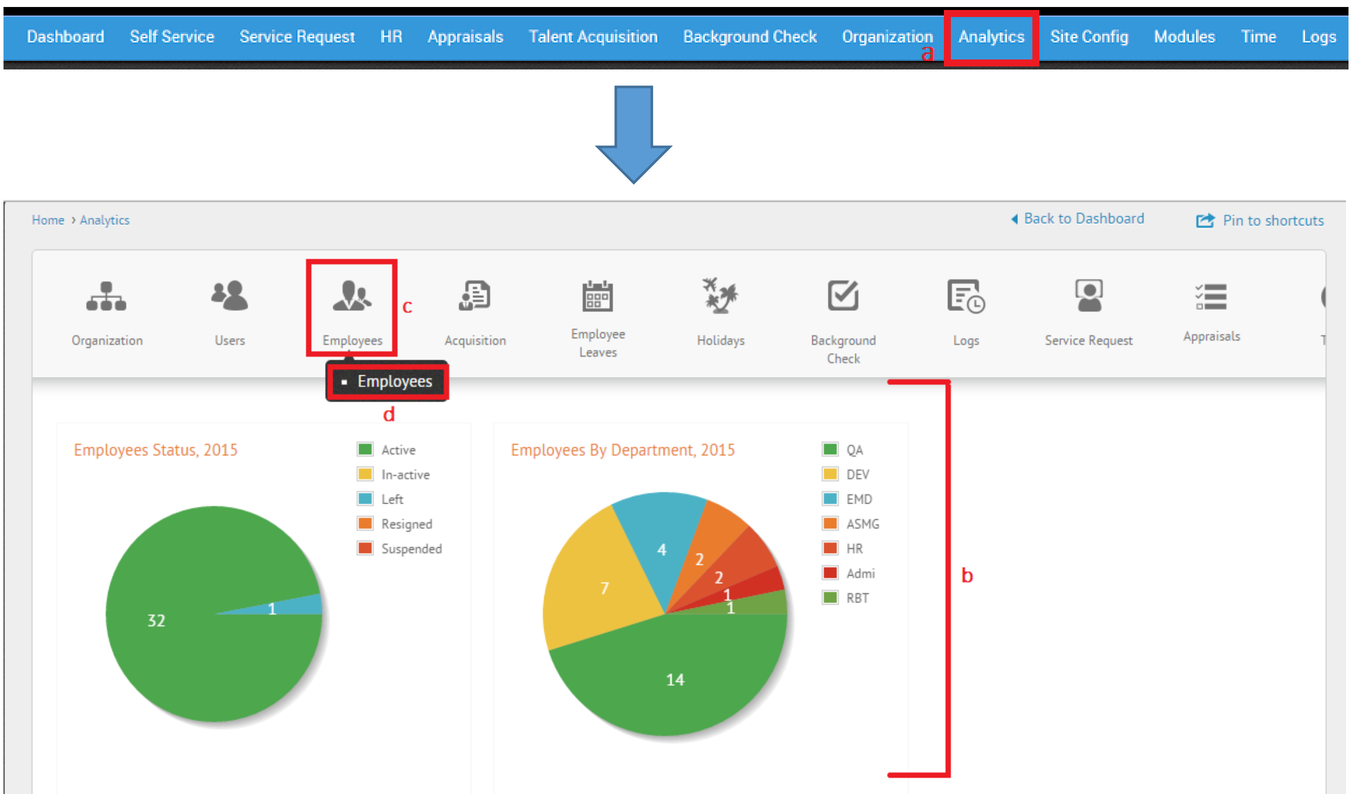
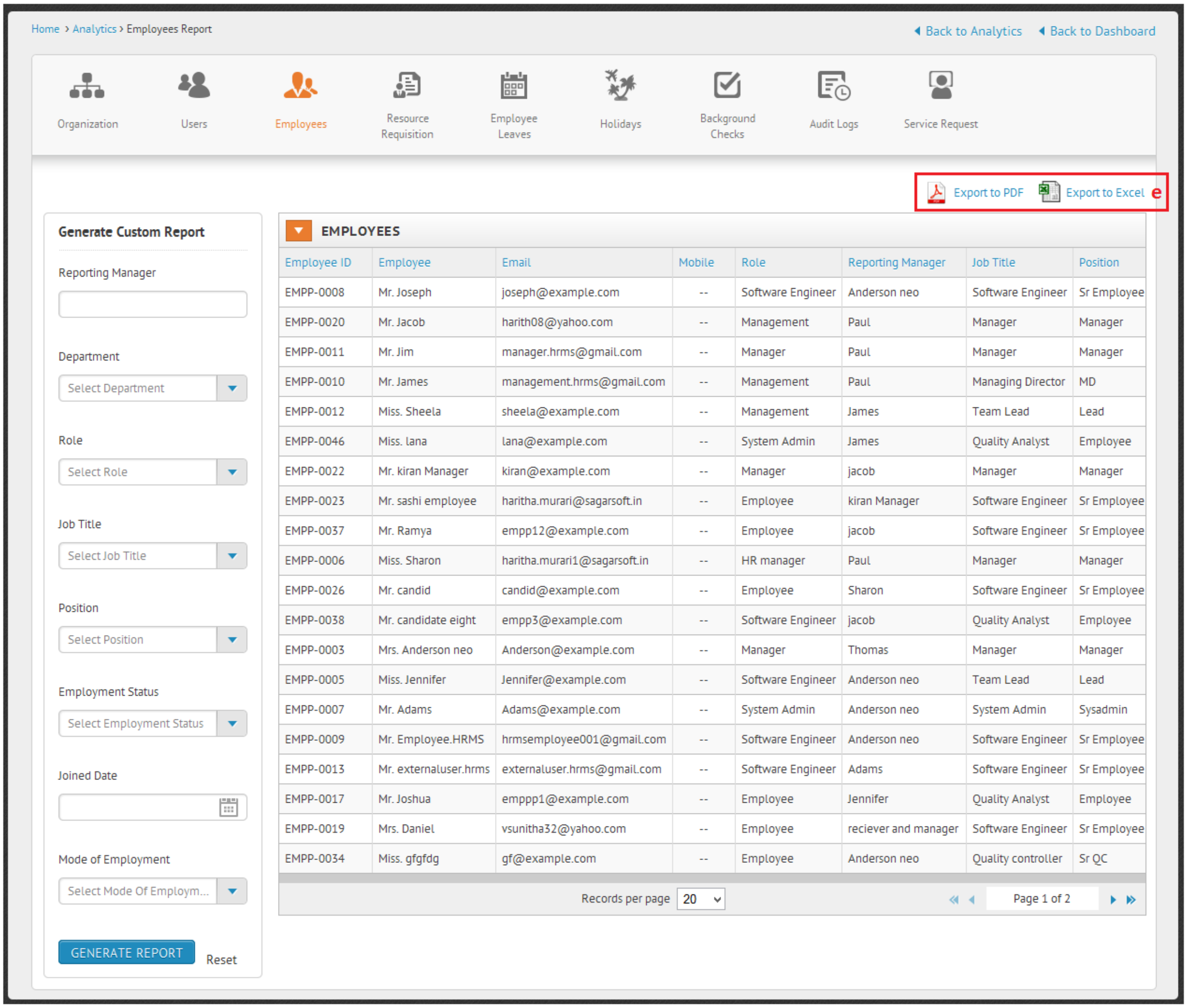


Figure 19

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

Refer Figure 19.1



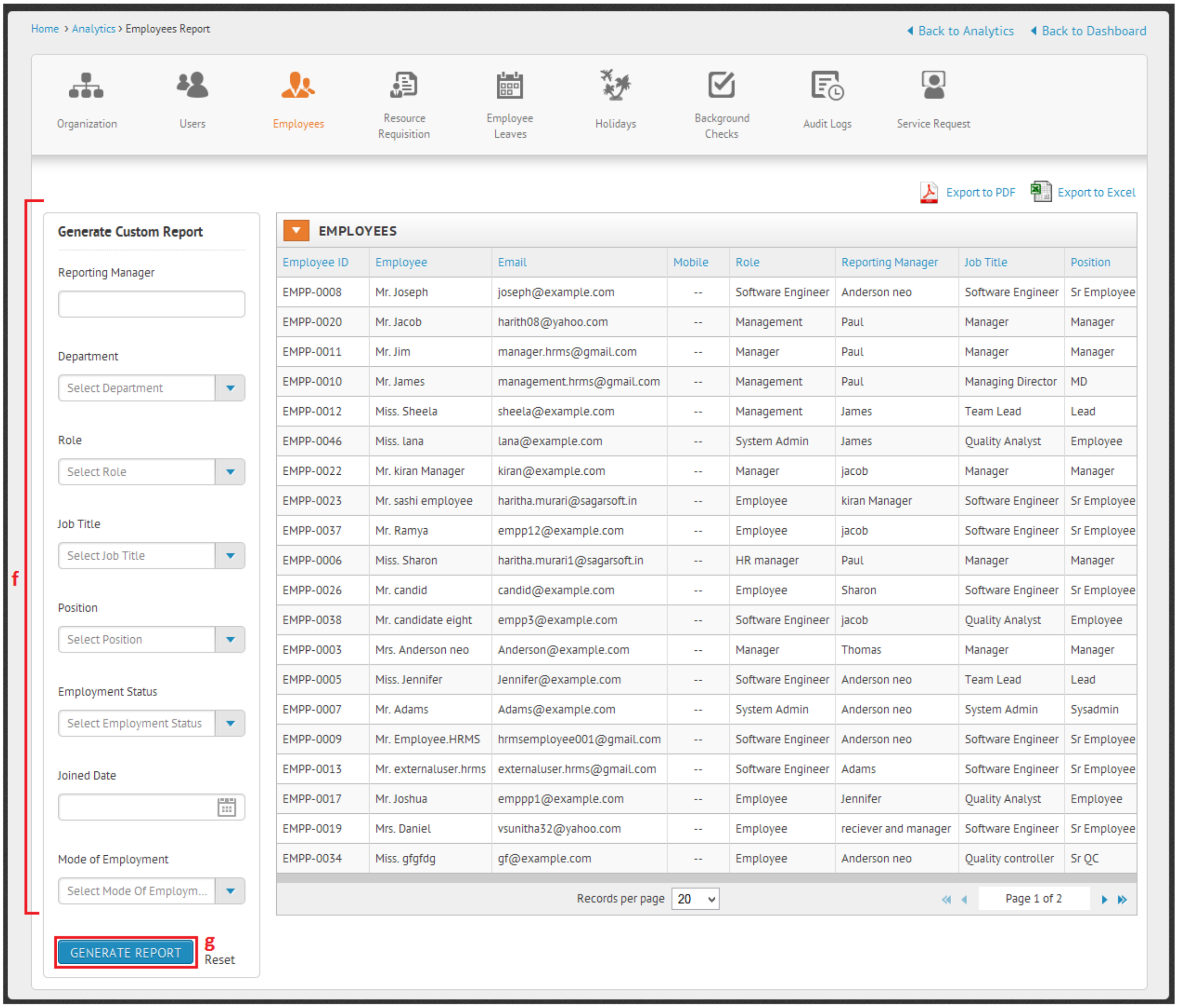
Employee ID	Employee	Email	Mobile	Role	Reporting Manager	Job Title	Position
EMPP-0008	Mr. Joseph	joseph@example.com	--	Software Engineer	Anderson neo	Software Engineer	Sr Employee
EMPP-0020	Mr. Jacob	harith08@yahoo.com	--	Management	Paul	Manager	Manager
EMPP-0011	Mr. Jim	manager.hrms@gmail.com	--	Manager	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 19.1

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 19.2



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 19.2

View Activity log

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

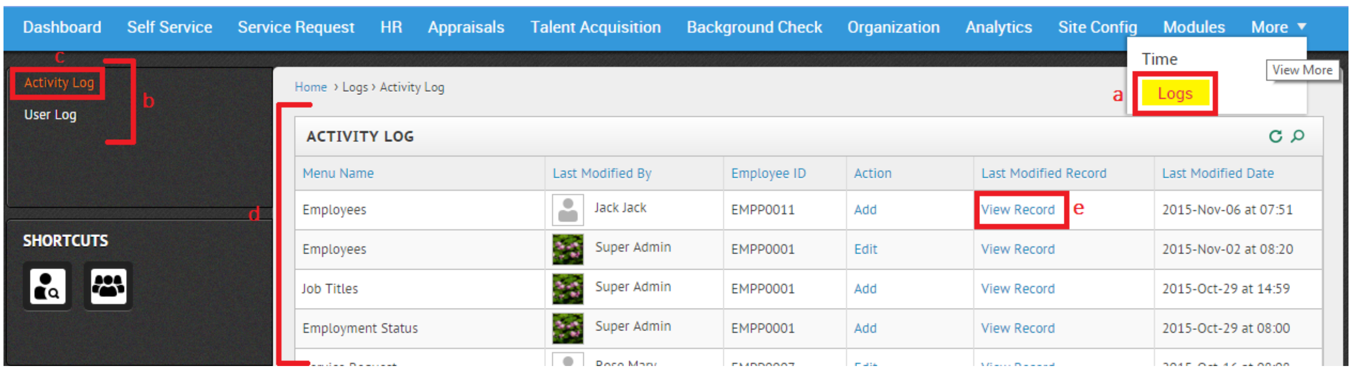


Figure 20

View User log

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

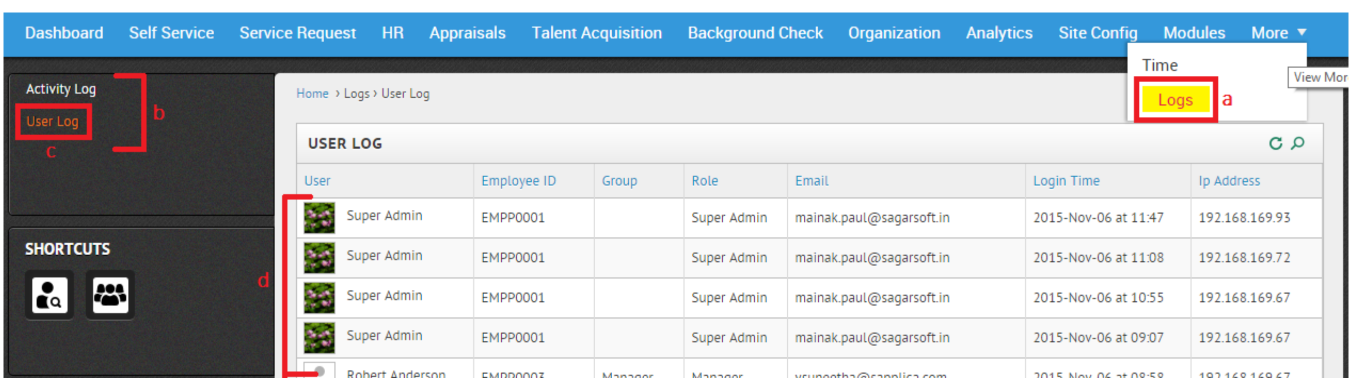


Figure 20.1

Set Shortcuts

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

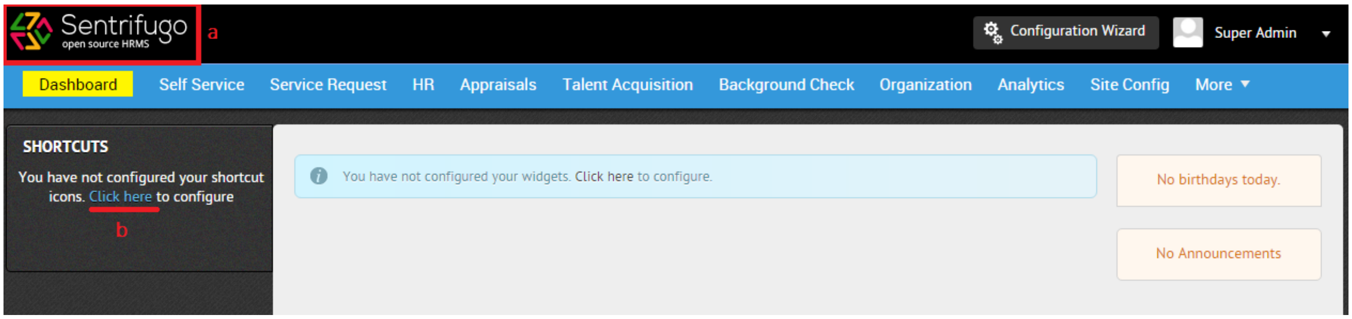


Figure 21

Or

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

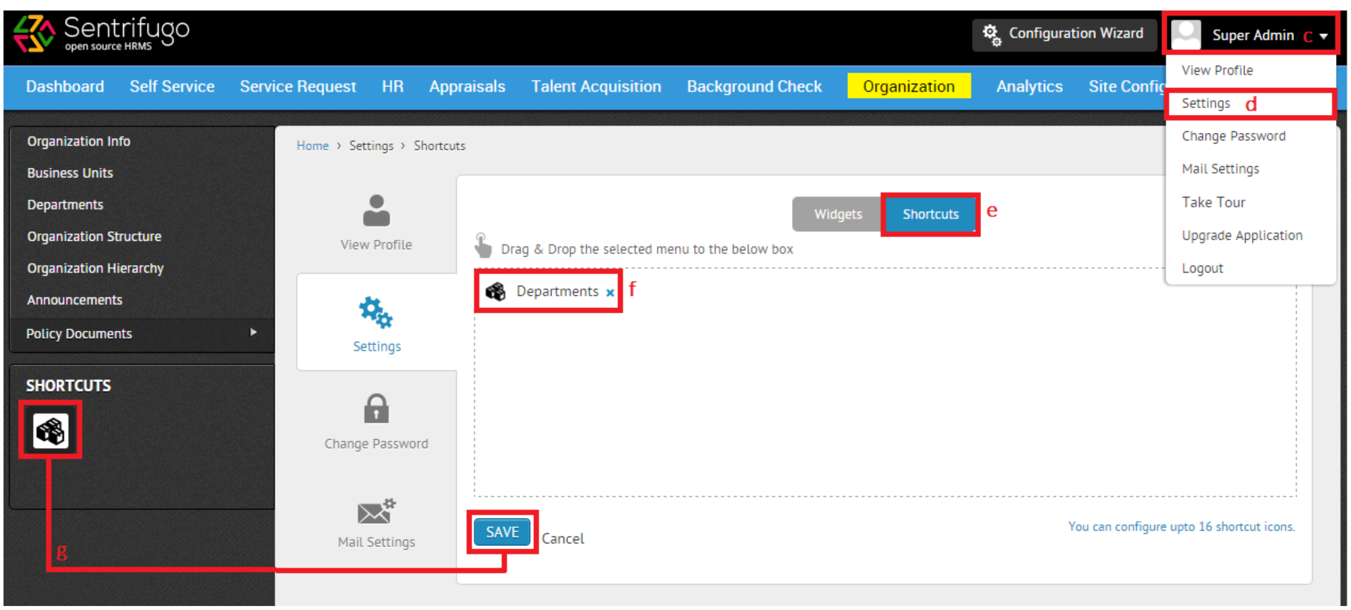


Figure 21.1

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 21.2, which explains about creating a shortcut as you browse through the application

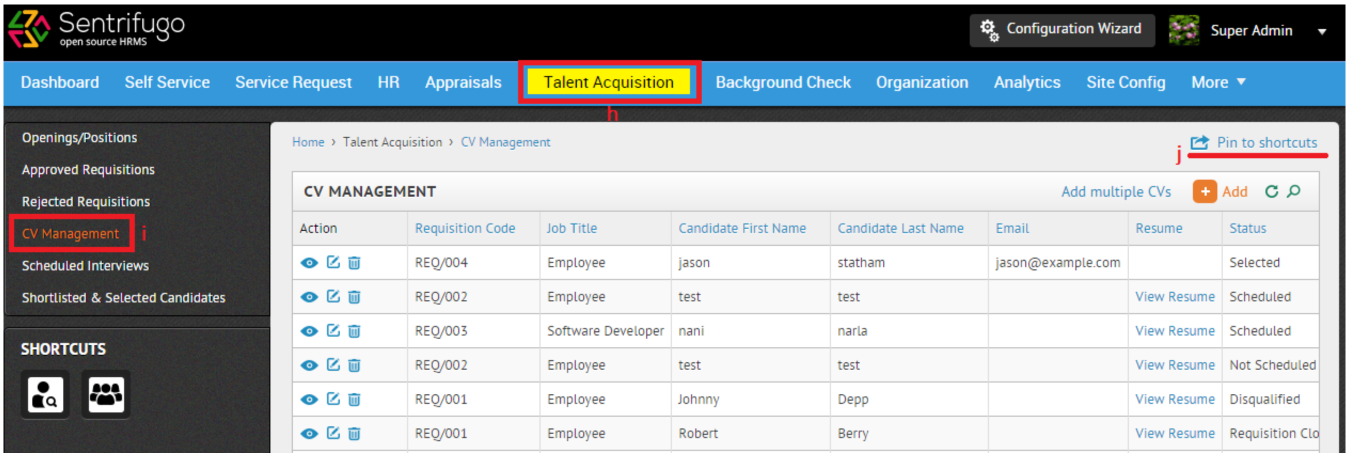


Figure 21.2

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

Refer Figure 22 & 22.1

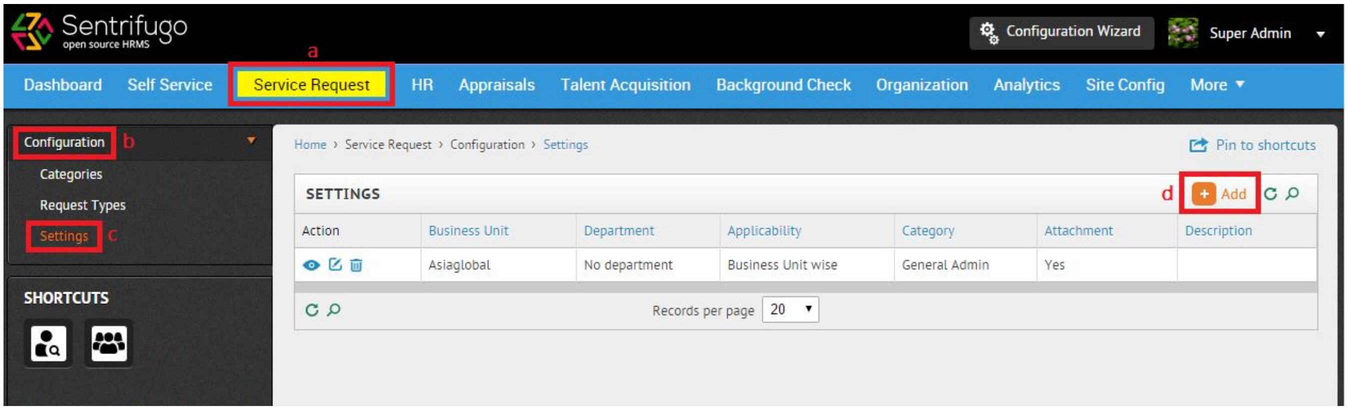


Figure 22

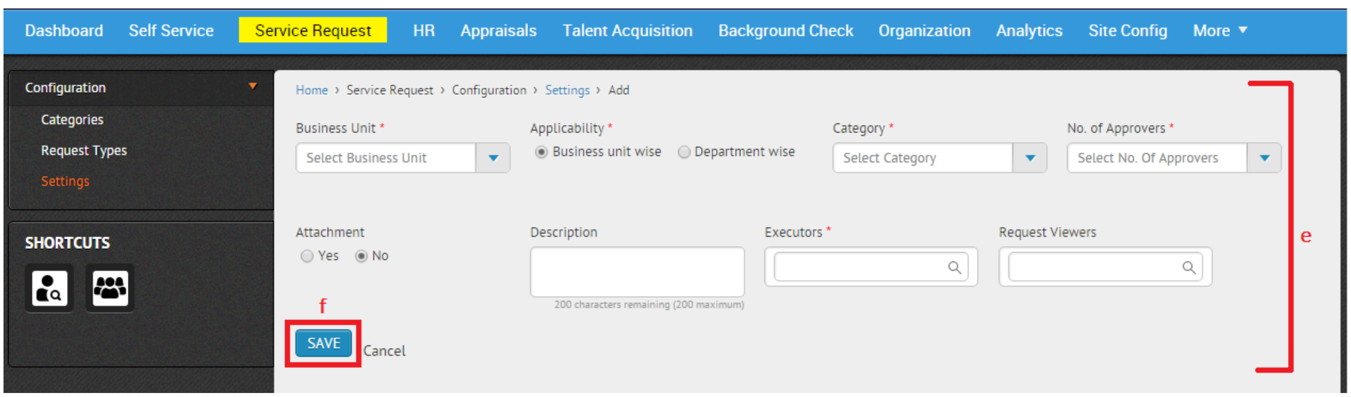


Figure 22.1

Set Cron Jobs

You should receive 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

Note: Always run the cron jobs after signing out of Sentrifugo.

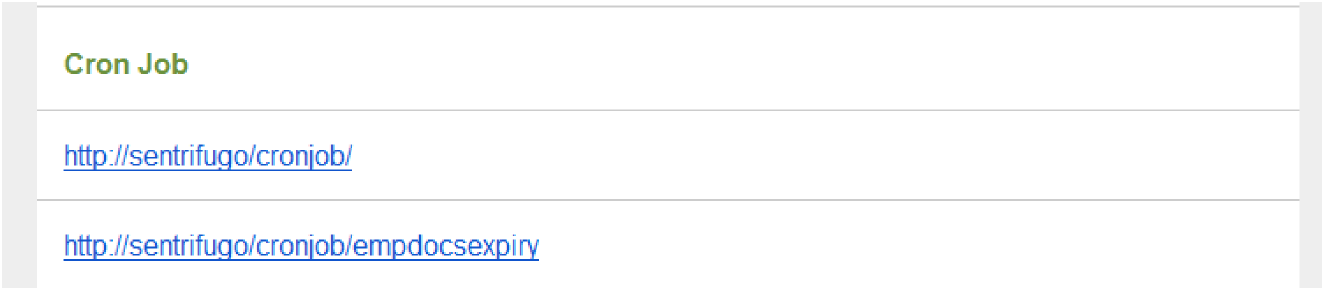


Figure 23

Download Import Format

a. Click on HR 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 side to download the format
d. For further guidance, click on the **Help** link

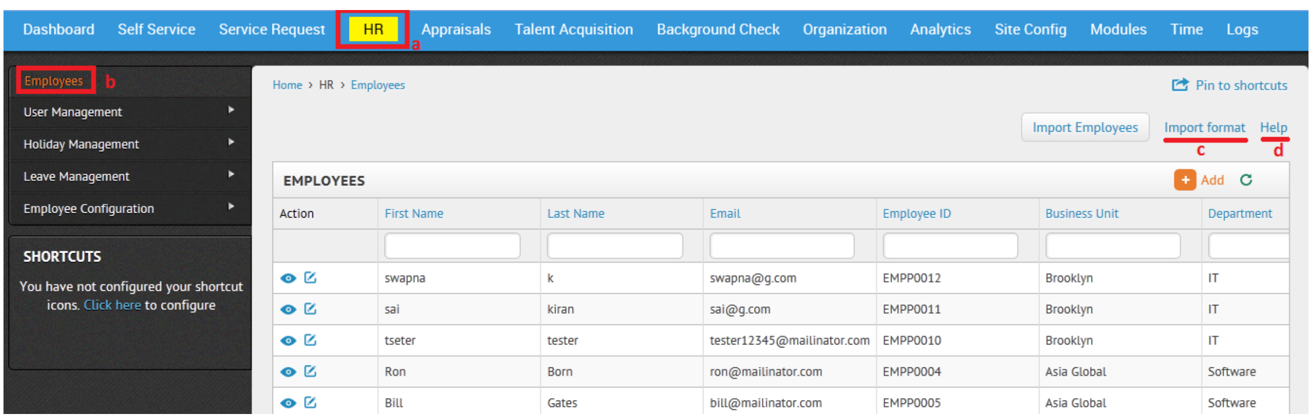


Figure 24

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

Refer Figure 24.1 for the import format

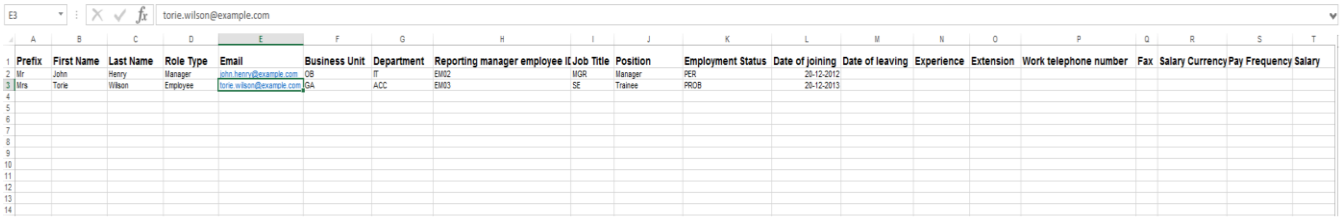


Figure 24.1

Policy Documents

Policies communicate your organization's rules and procedures. Users will have access to view essential documents whenever required. You can easily access & store all the organization's important policy documents

a. Select the option Organization in the top menu
b. Select the option Policy Documents in the submenu on the left side panel
c. Click on Categories
d. Click on Add

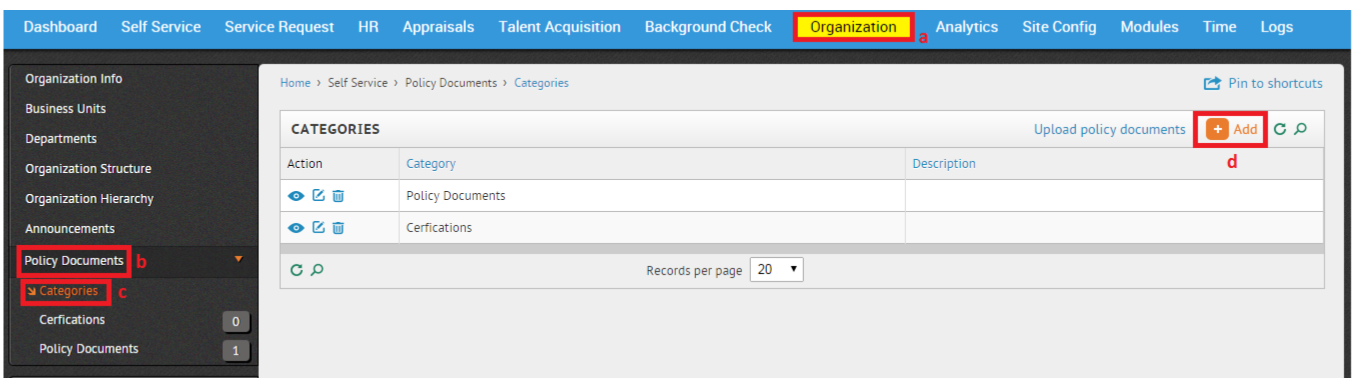


Figure 25

Create a category by filling in the field ‘Category’ with the category name. Click on ADD to complete the step.

Refer Figure 25.1

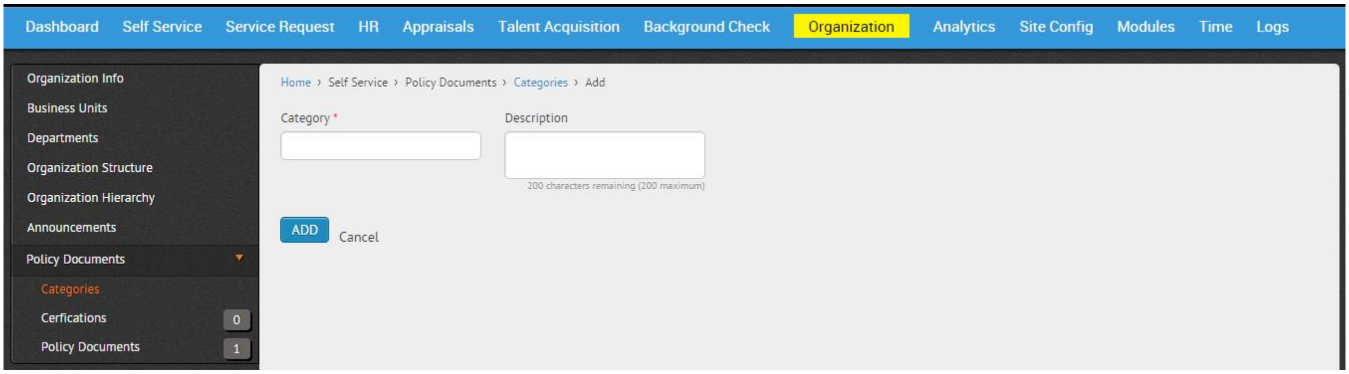


Figure 25.1

Upload Policy Documents

e. Click on the link ‘Upload policy documents’

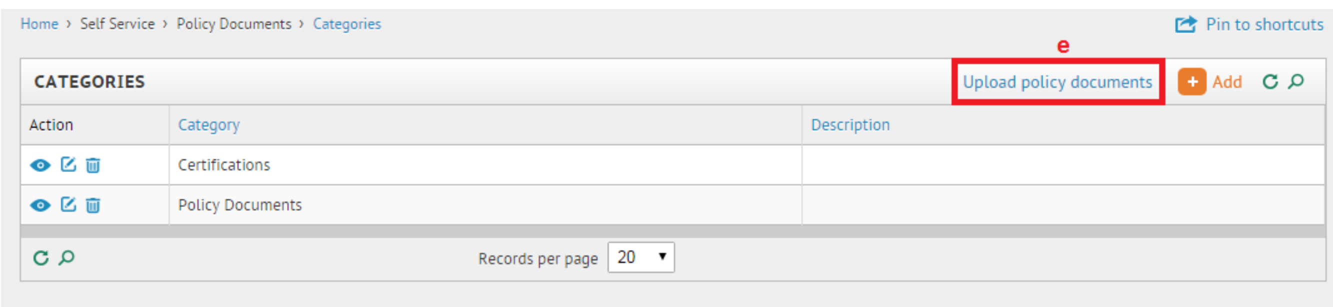


Figure 25.2

Or

After adding the policy documents categories, you will find that the categories will appear on the left side panel below the option ‘Categories’.

f. Click on a category which you had created on the left side panel
g. Click on Add.

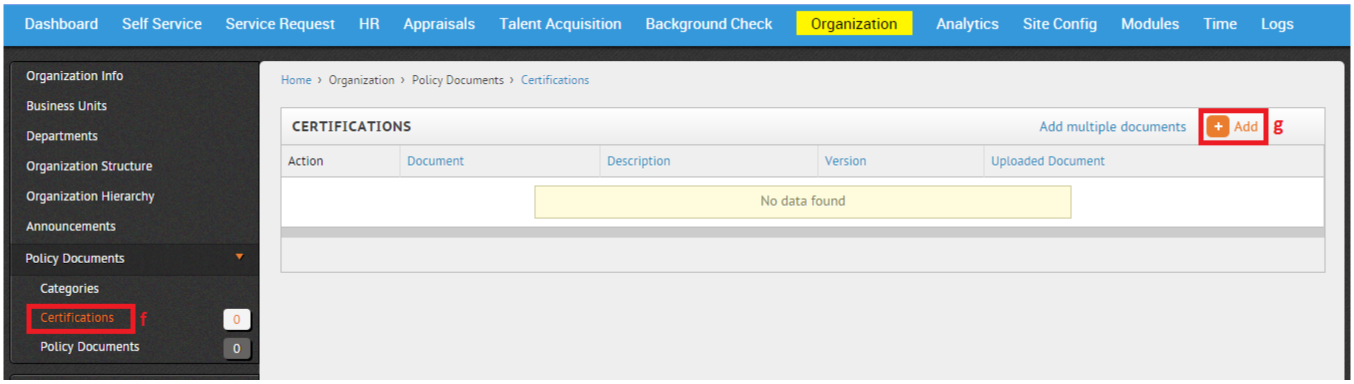


Figure 25.3

The following screen will appear (for both cases Figure 25.2 & 25.3):

a. Document name
b. Document category (previously created category)
c. Add a category
d. Document Description
e. Document Version
f. Upload a document (Allowed file extensions: doc, docx, pdf)
g. Add the document

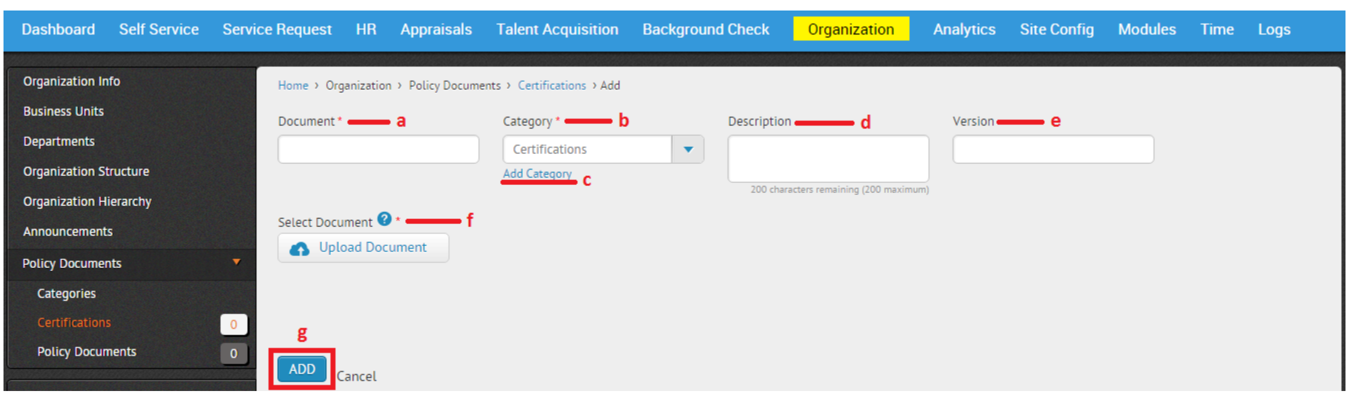


Figure 25.4

Upload Multiple Documents

h. Select a category you had created on the left side panel
i. Click on 'Add multiple documents'

Refer Figure 25.5

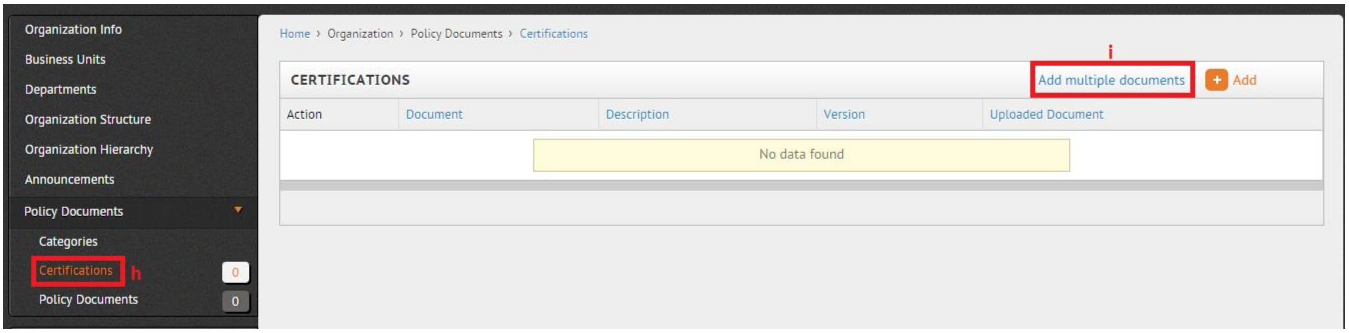


Figure 25.5

j. Category name
k. Add multiple documents (Max 5)
l. Document name
m. Document Description
n. Document Version
o. Upload Document
p. Add the document(s) .

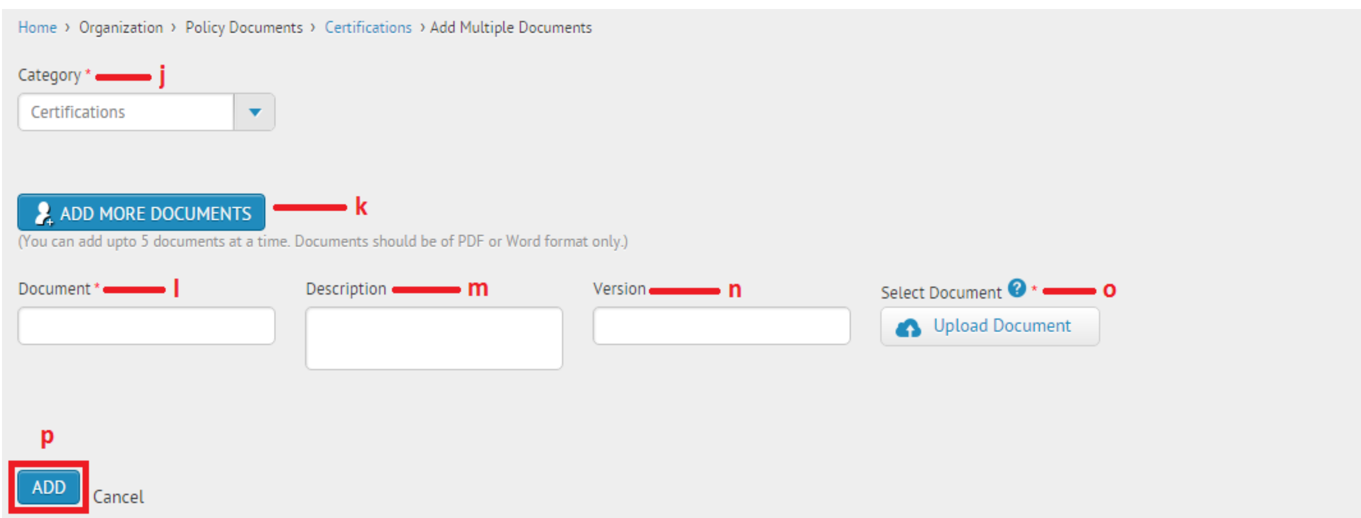


Figure 25.6

Configuration Wizard for HR

When an HR users log into Sentrifugo for the first time, they will need to configure the following steps:

1. Configure Leave Types: HR can create different leave types (e.g. Sick, Annual etc.) and allocate days for each leave type.
    a. Name of the leave type
    b. Number of days allocated to the leave type
    c. Add more leave types
    d. Save the leave types you have configured and added
    e. Click here to proceed to the next step

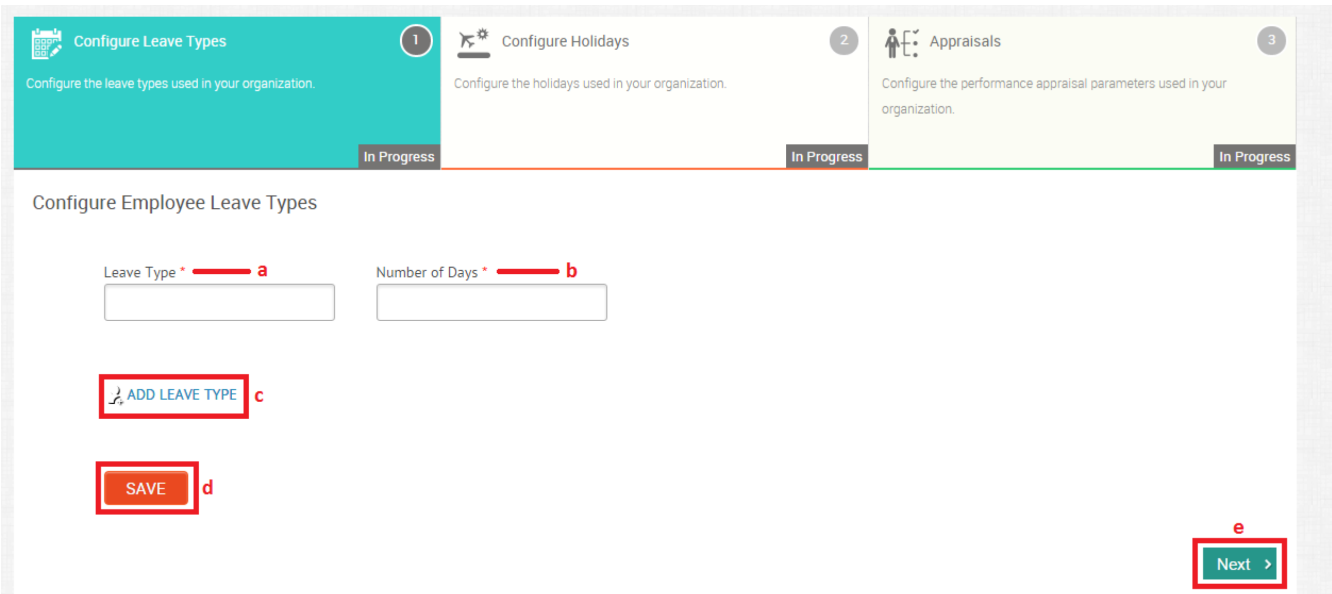


Figure 26

2. Configure Holidays: Certain organizations have branches/projects based in different countries and hence have a different holiday pattern. Create holiday groups so that various groups of employees having different holidays can be placed under different groups.

    f. Holiday group name
    g. Holiday name
    h. Add more holiday groups names
    i. Holiday date
    j. Add more holiday names
    k. Save the holiday groups added
    l. Go to the previous step
    m. Proceed to the next step

Refer Figure 26.1

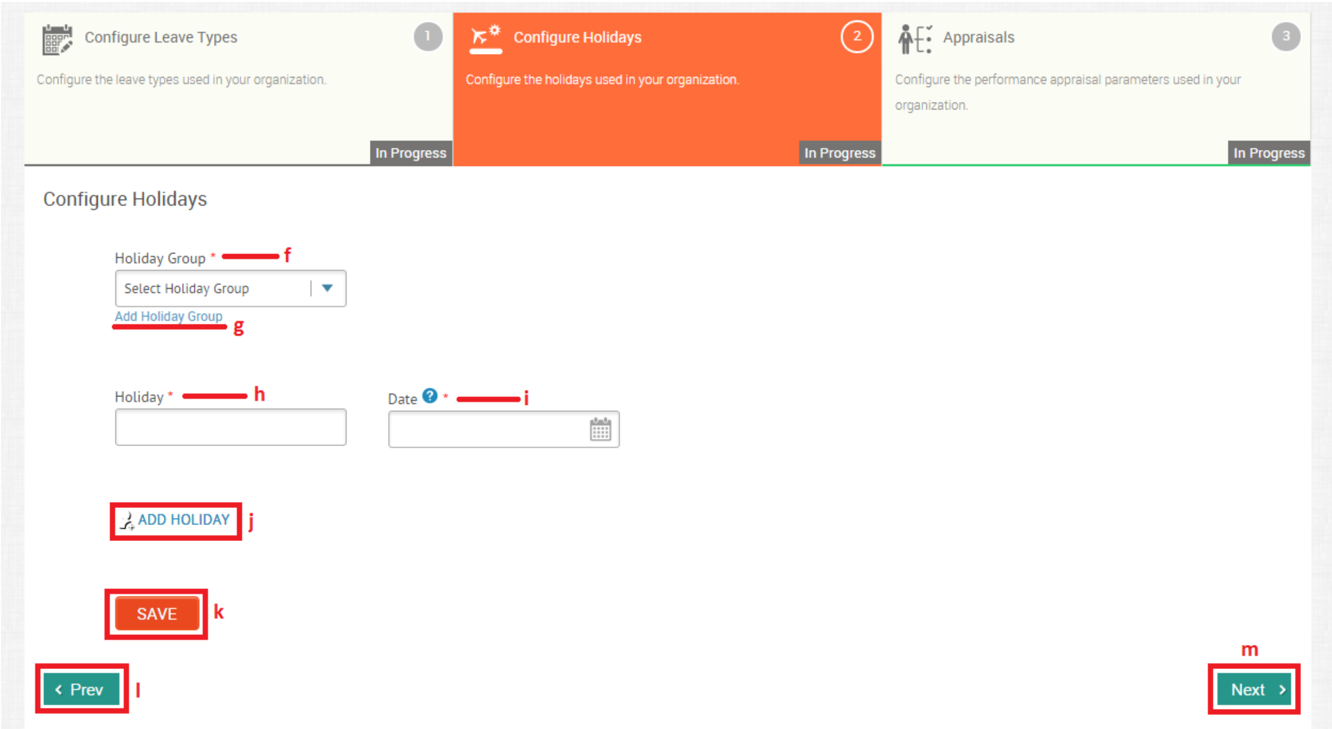


Figure 26.1

3. Configure Performance Appraisals: Configure the appraisal parameters and questions required for the performance appraisal process.

    n. Parameter name
    o. Question for the appraisal process
    p. Question's description
    q. Add more questions
    r. Save the parameters and questions added
    s. Go to previous steps
    t. Back to the application site

    Refer Figure 26.2

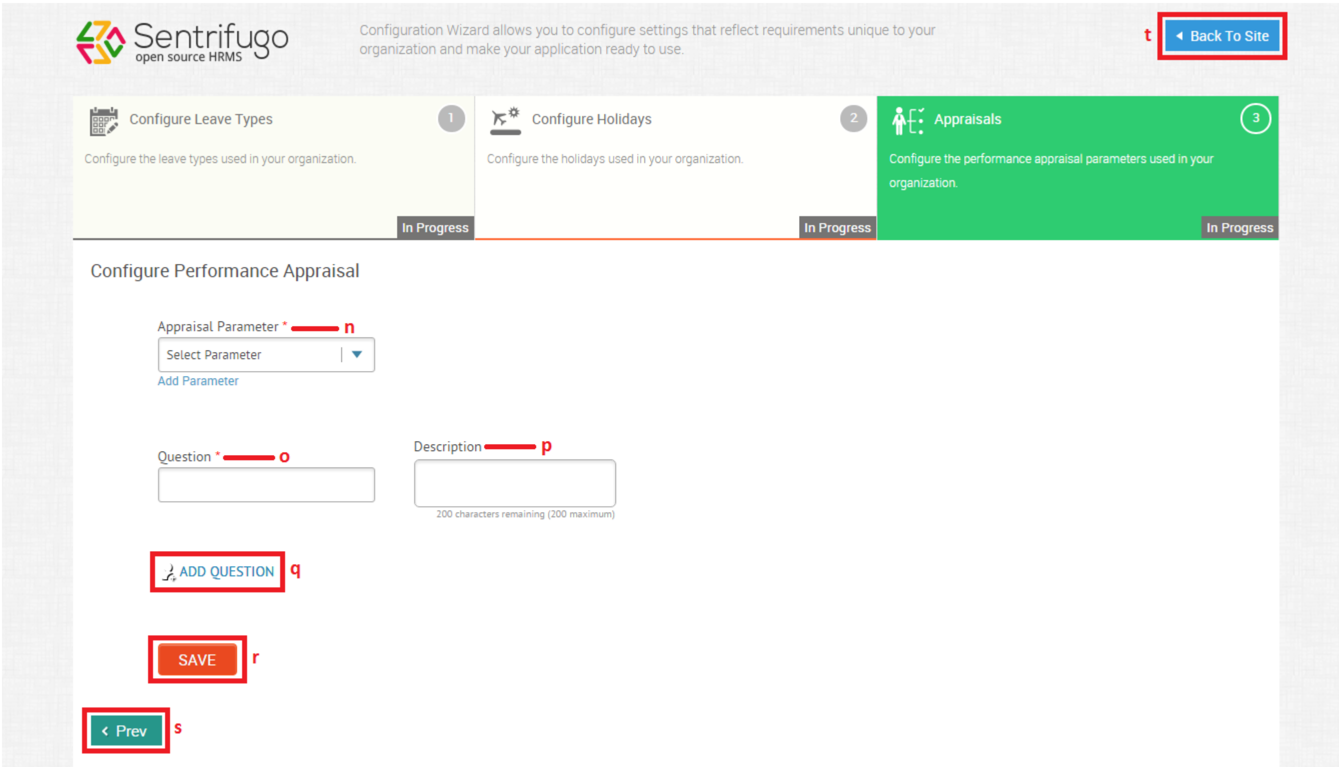


Figure 26.2

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. Please refer our Appraisal process guide for a detailed description on how the Performance Appraisal process works in Sentrifugo.

Time

Sentrifugo's Time Module is a unique Timesheet Management tool. Managers can configure projects details and add employees to projects. They can view timesheets of the employees reporting to them in a daily, weekly or monthly view format. Employees can enter the hours spent on an assigned project. Employee and project based time reports can be generated based on the details entered by the employees. Please refer our Time Management process guide for a detailed description on how the Time Management process works in Sentrifugo.