

# 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

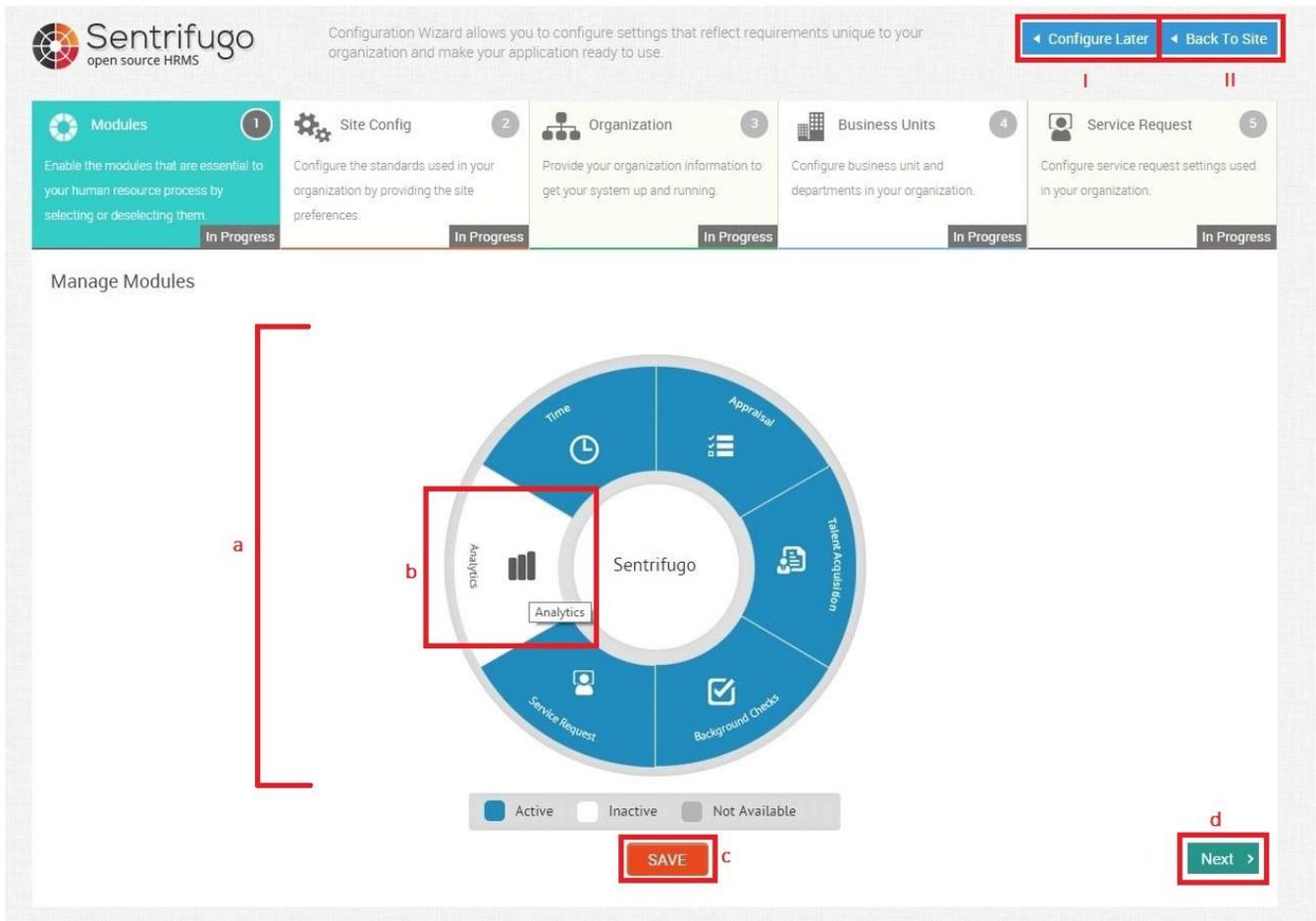


Figure 1

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

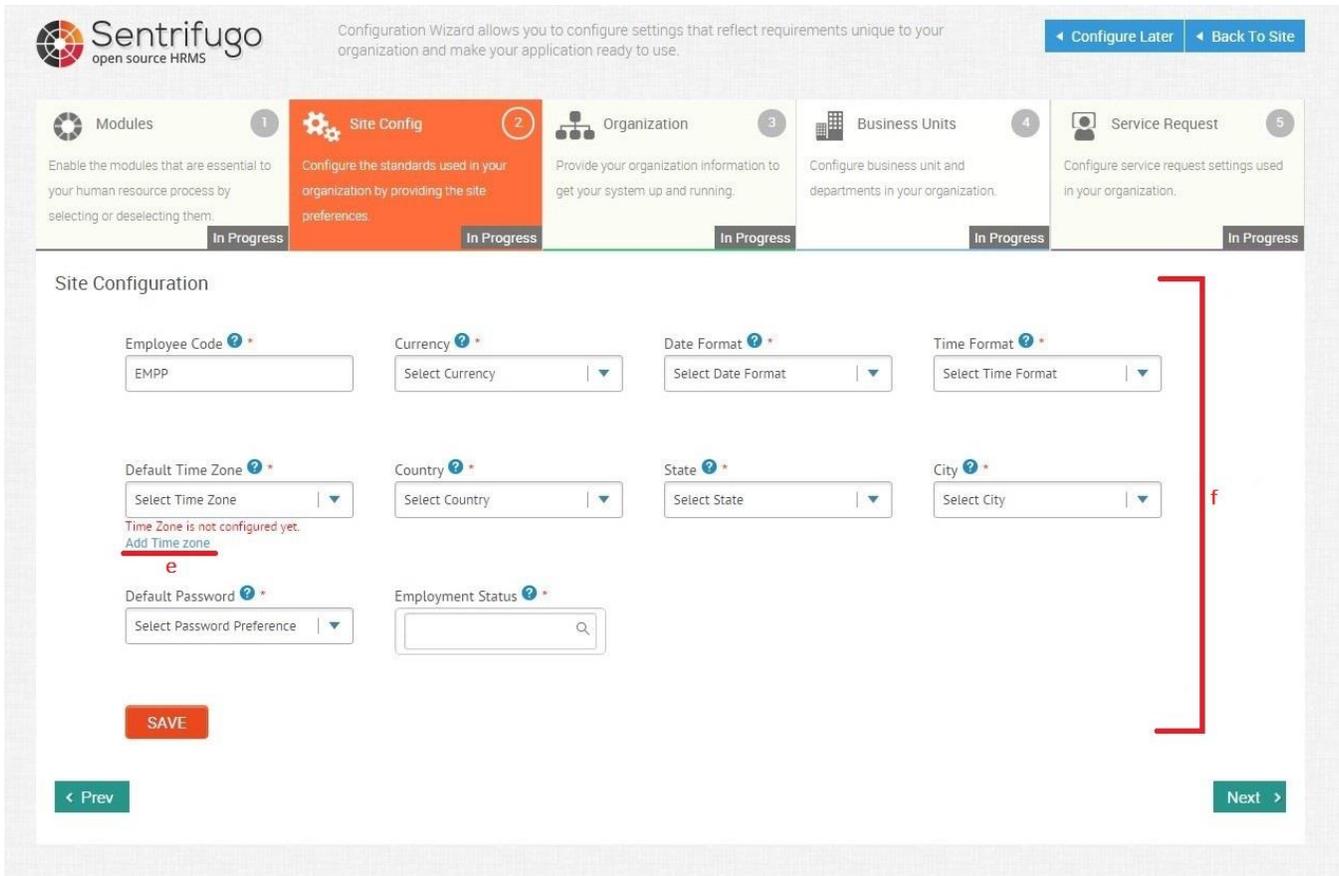


Figure 1.1

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.

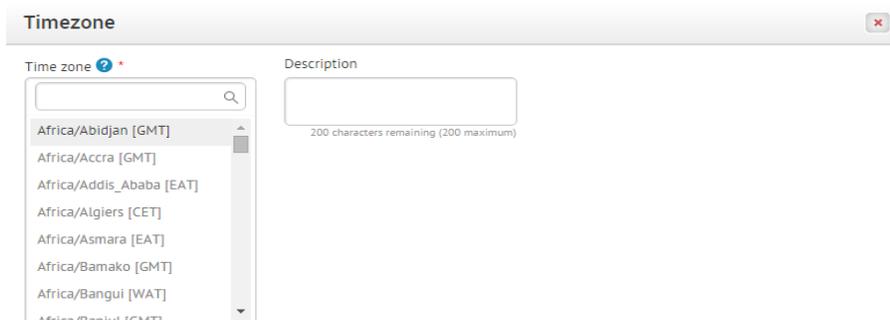
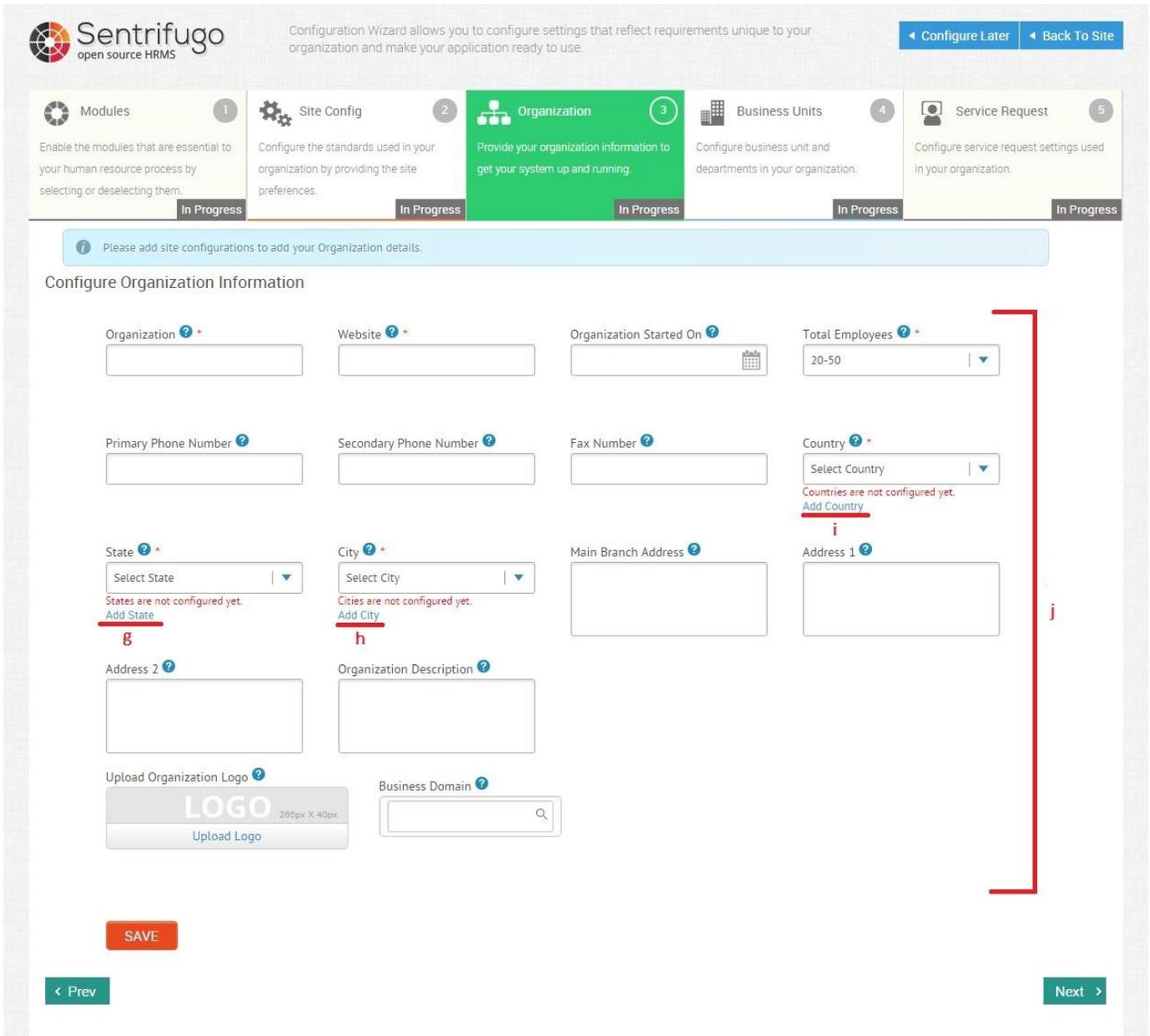


Figure 1.2

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



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

Configure Organization Information

Please add site configurations to add your Organization details.

Organization \* Website \* Organization Started On Total Employees \*  
 Primary Phone Number Secondary Phone Number Fax Number Country \*  
 State \* City \* Main Branch Address Address 1  
 Address 2 Organization Description  
 Upload Organization Logo Business Domain

g h i j

SAVE

Prev Next

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

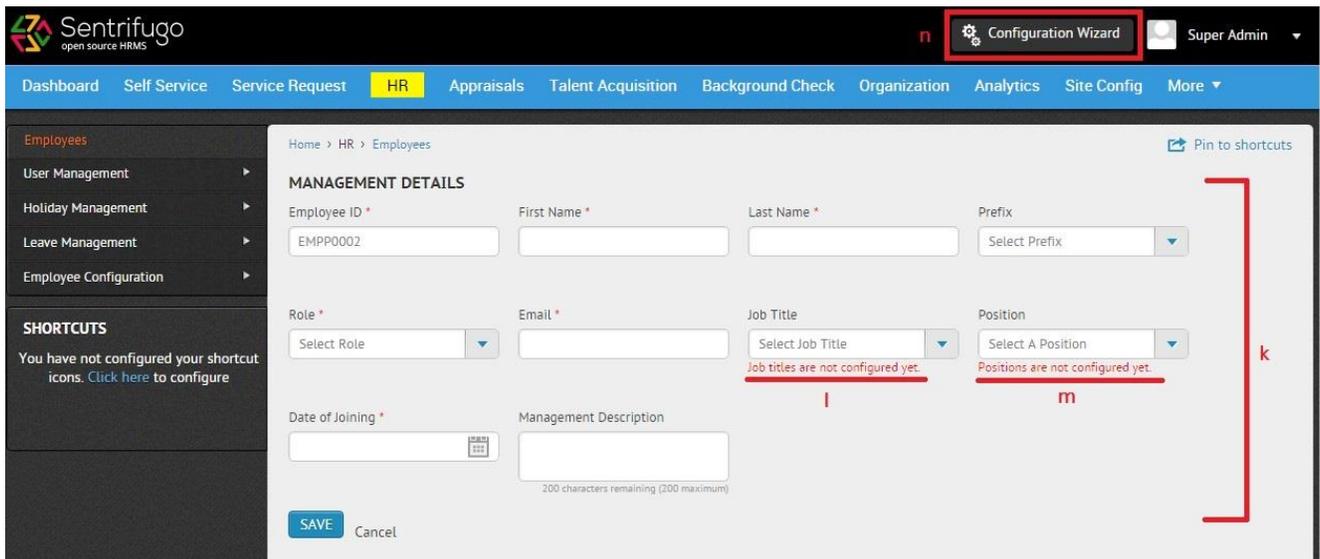
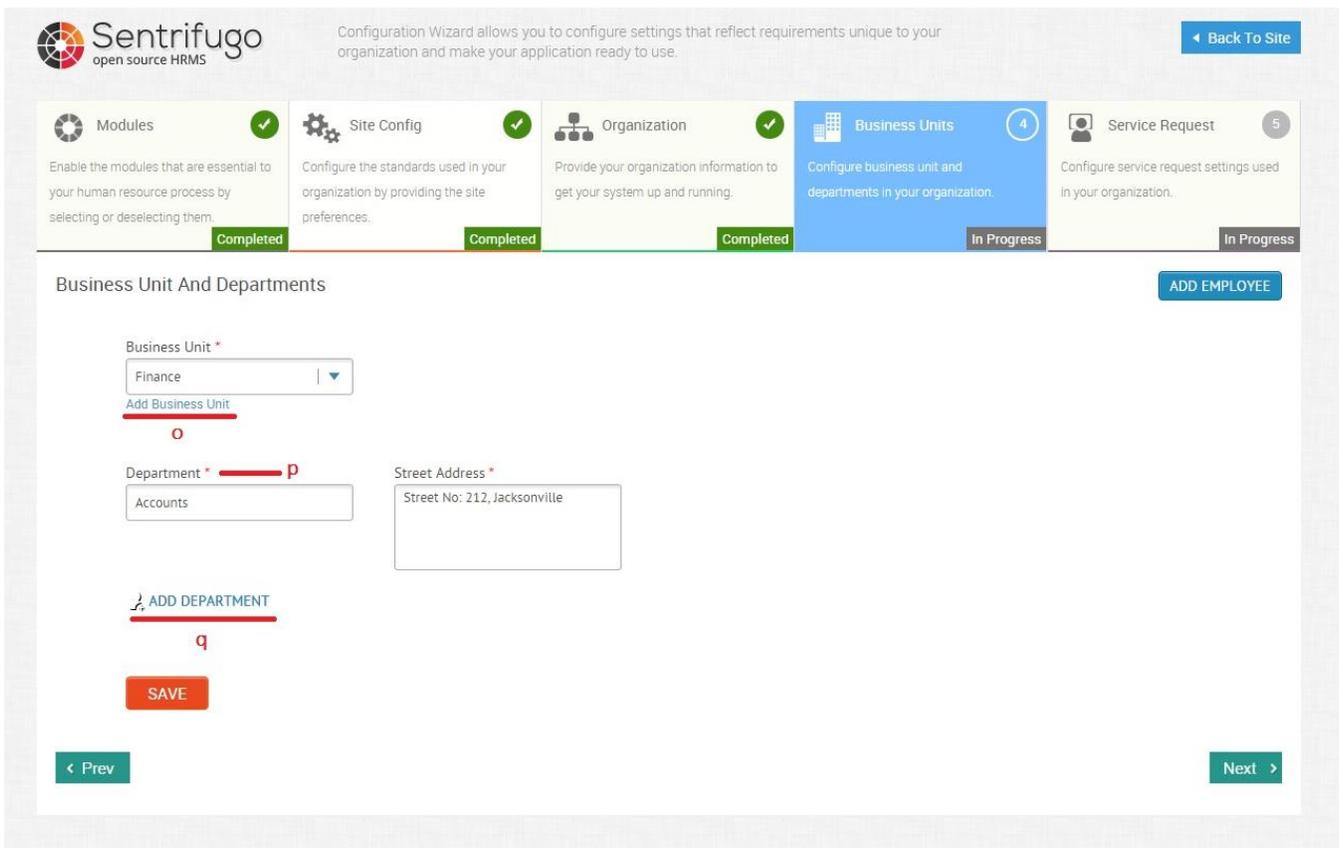


Figure 1.4

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)

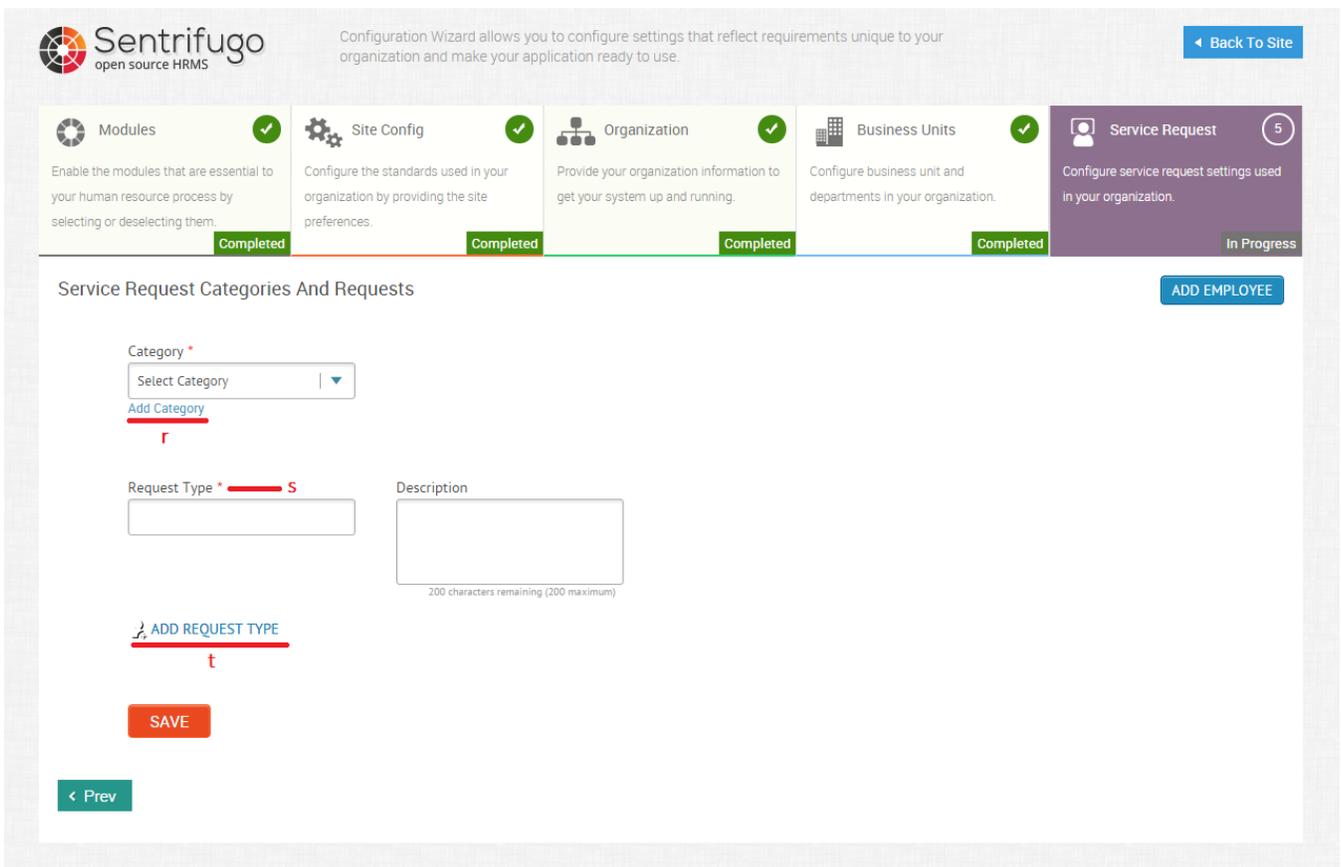


The screenshot shows the Sentrifugo Configuration Wizard interface. At the top, the Sentrifugo logo and tagline "open source HRMS" are displayed. A navigation bar contains five steps: Modules (Completed), Site Config (Completed), Organization (Completed), Business Units (In Progress, step 4), and Service Request (In Progress, step 5). A "Back To Site" button is in the top right. The main content area is titled "Business Unit And Departments" and includes an "ADD EMPLOYEE" button. The form contains a "Business Unit \*" dropdown menu with "Finance" selected, a red "o" icon, and a red "p" icon. Below it is a "Department \*" text input with "Accounts" entered. To the right is a "Street Address \*" text input with "Street No: 212, Jacksonville" entered. There are "ADD BUSINESS UNIT" and "ADD DEPARTMENT" buttons, a red "q" icon, and a "SAVE" button. Navigation buttons for "< Prev" and "Next >" are at the bottom.

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



The screenshot displays the Sentrifugo Configuration Wizard interface. At the top, the Sentrifugo logo and tagline 'open source HRMS' are visible. A navigation bar shows five steps: Modules, Site Config, Organization, Business Units, and Service Request. The Service Request step is highlighted in purple and marked as 'In Progress' with a '5' in a circle. A 'Back To Site' button is in the top right. Below the navigation bar, the 'Service Request Categories And Requests' section is active. It features a 'Category' dropdown menu with 'Select Category' and an 'Add Category' link. Below this is a 'Request Type' field with a red 'S' and a 'Description' text area with a '200 characters remaining (200 maximum)' indicator. At the bottom of the form are 'ADD REQUEST TYPE' (with a red 't'), 'SAVE', and '< Prev' buttons.

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.

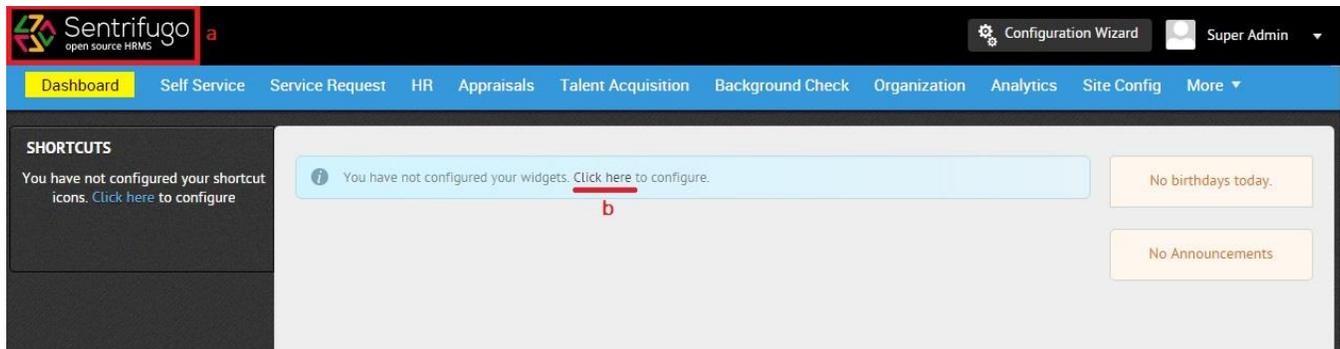


Figure 2

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

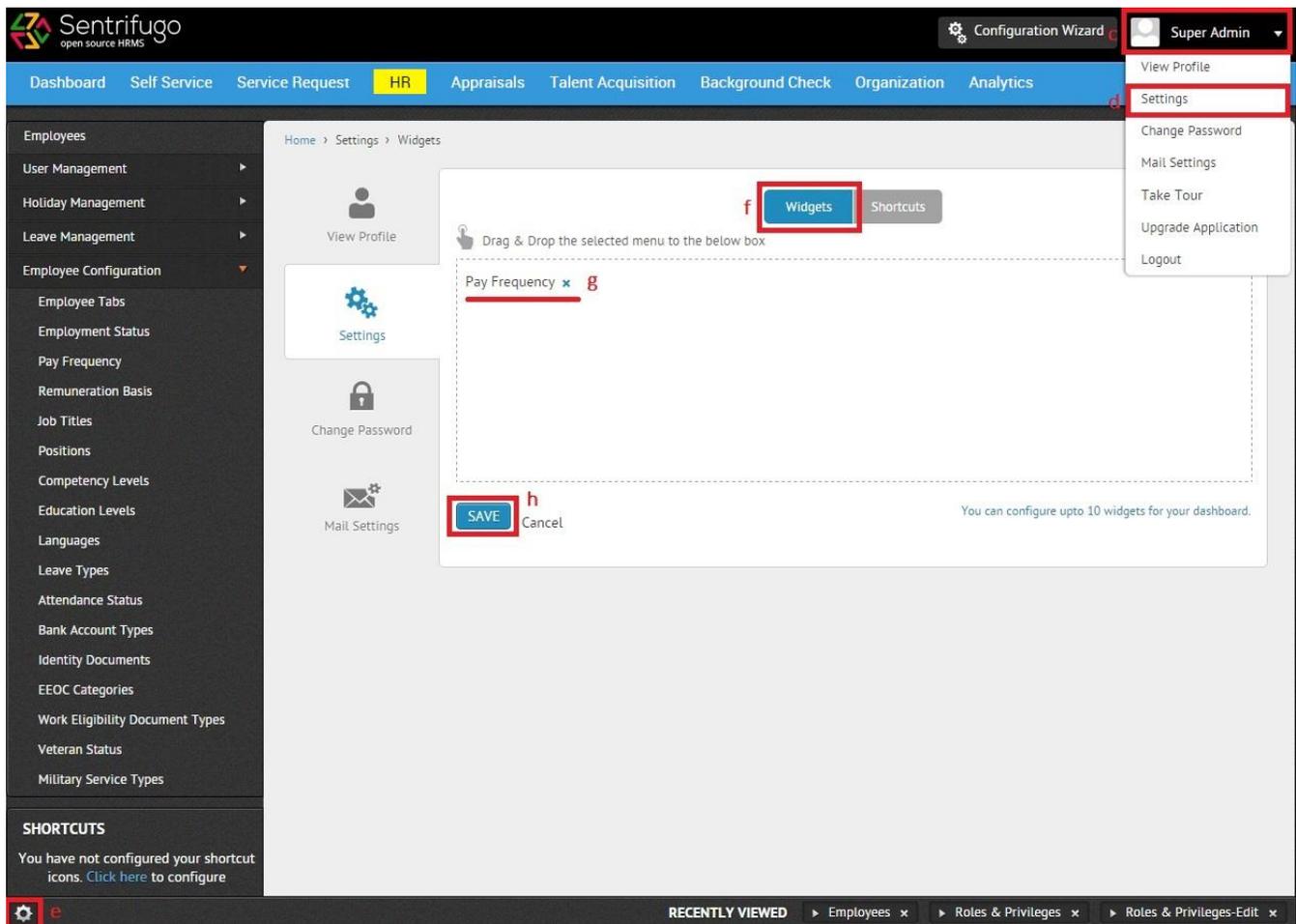


Figure 2.1

**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

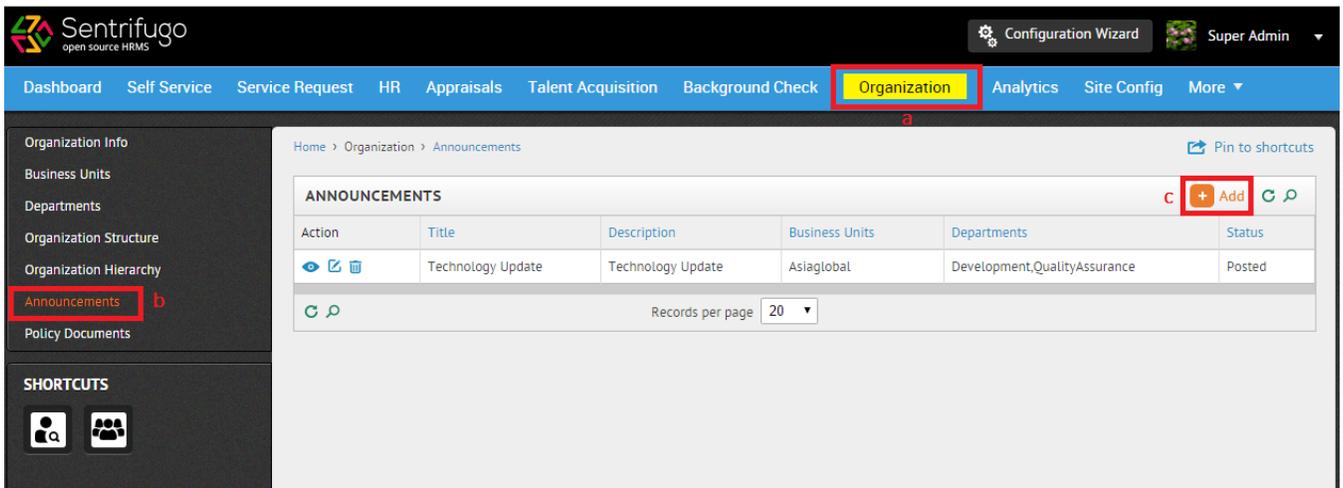


Figure 3

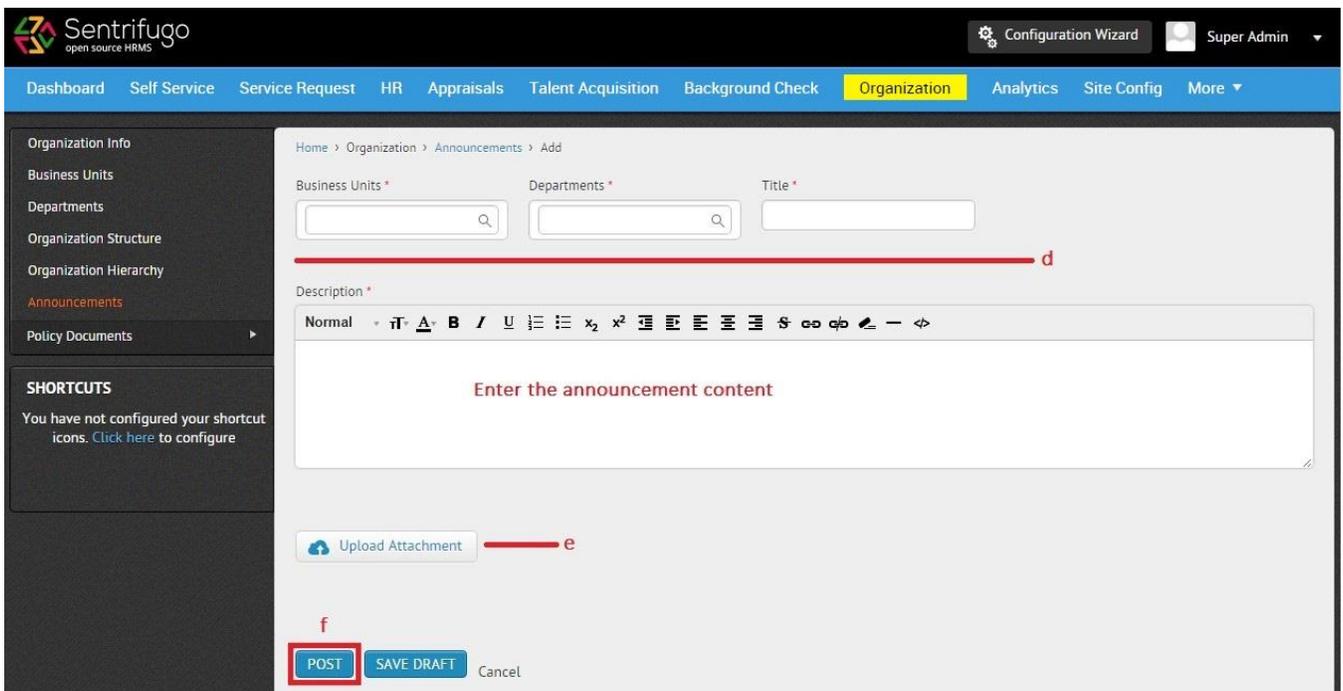


Figure 3.1

## Configure Site Config within the Application

- Click on Site Config in the top menu
- The left side panel will display the submenus
- Click on the desired submenu
- Click on the Add button on the right side panel
- Enter the required details
- Click Save button to add the detail

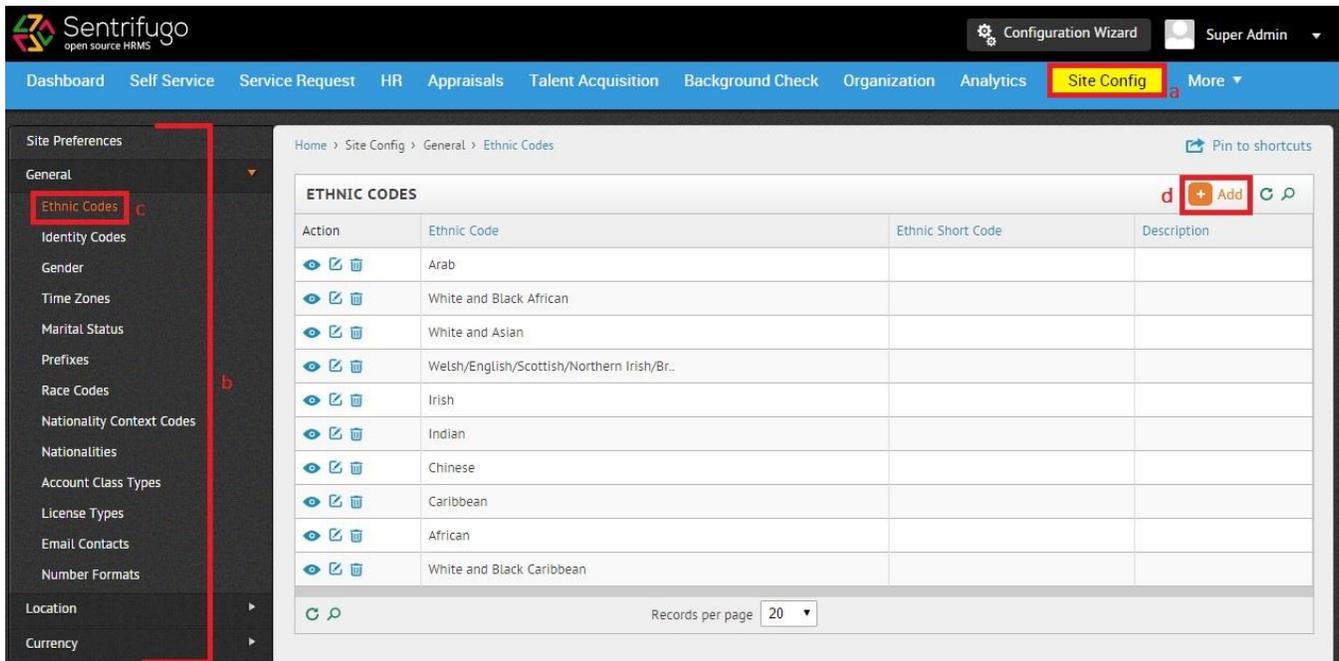


Figure 4

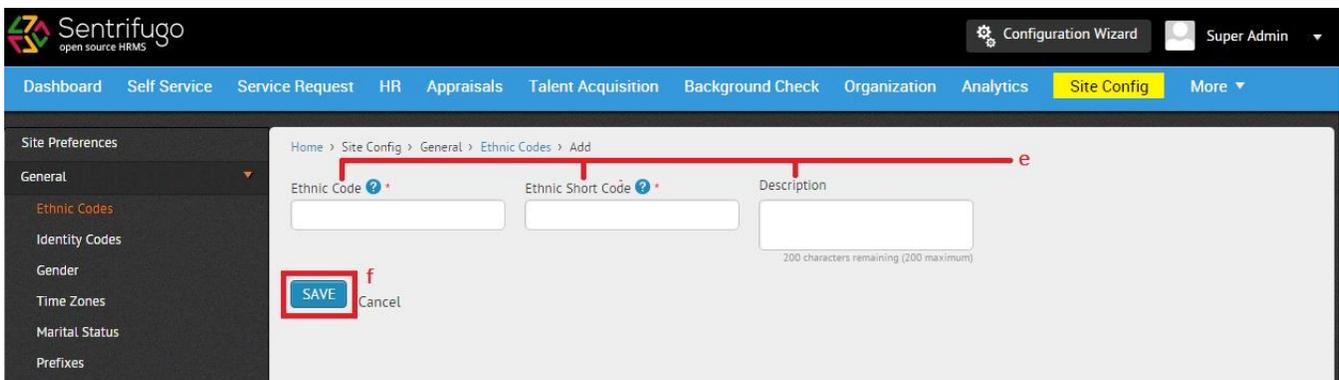


Figure 4.1

## Set Employee Configurations

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

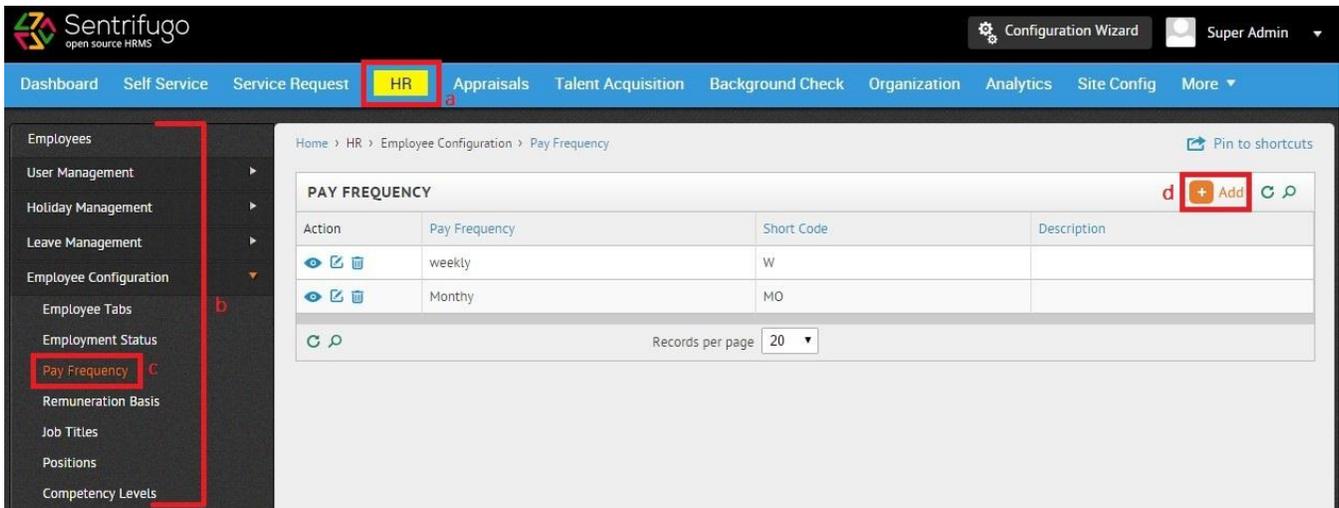


Figure 5

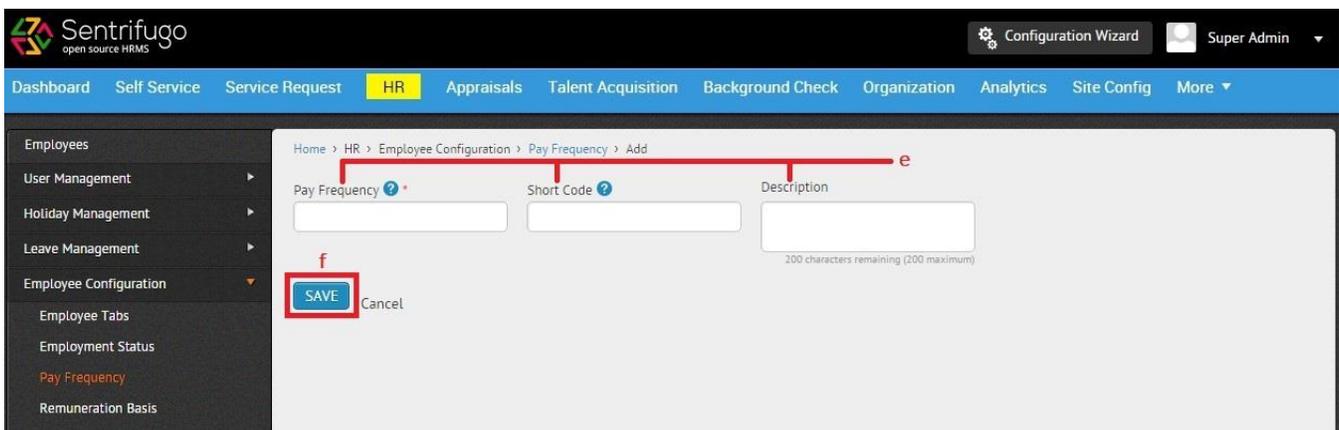


Figure 5.1

## Configure Tabs for Employees

- Click on HR in the top menu
- The left side panel will display the submenus
- Click on Employee Tabs
- Click on Edit button to configure tabs for employees
- To enable specific tabs for employees, check individual checkboxes with respect to desired tabs
- To enable all the tabs for employees, check “Check All” checkbox
- Click on Save to save the changes

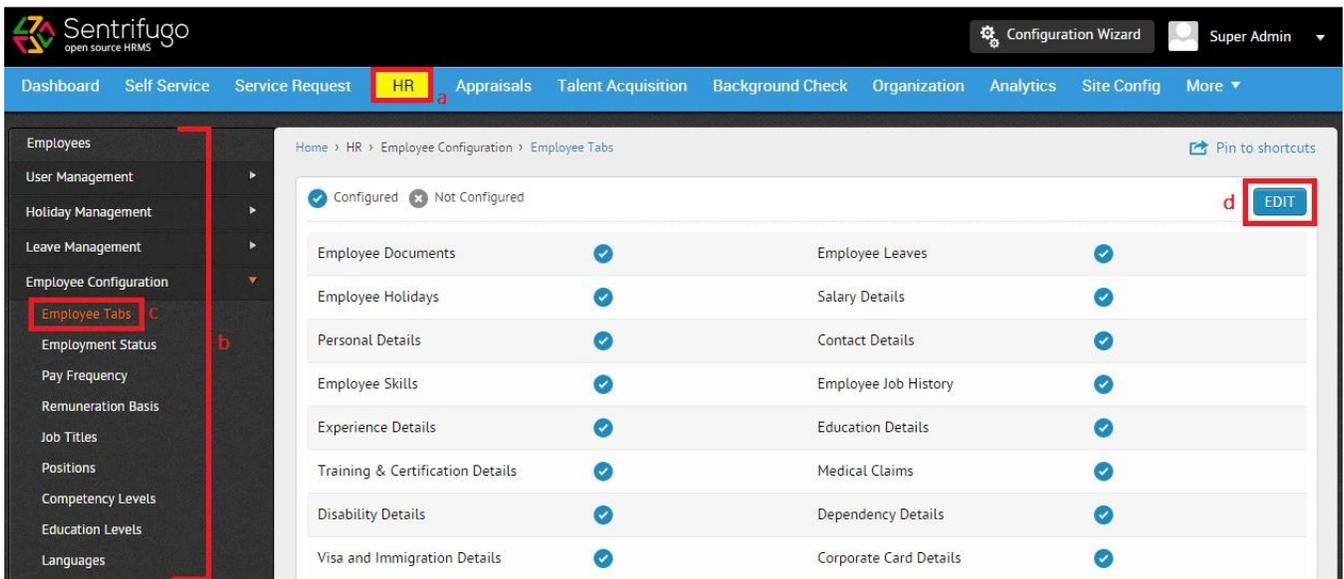


Figure 6

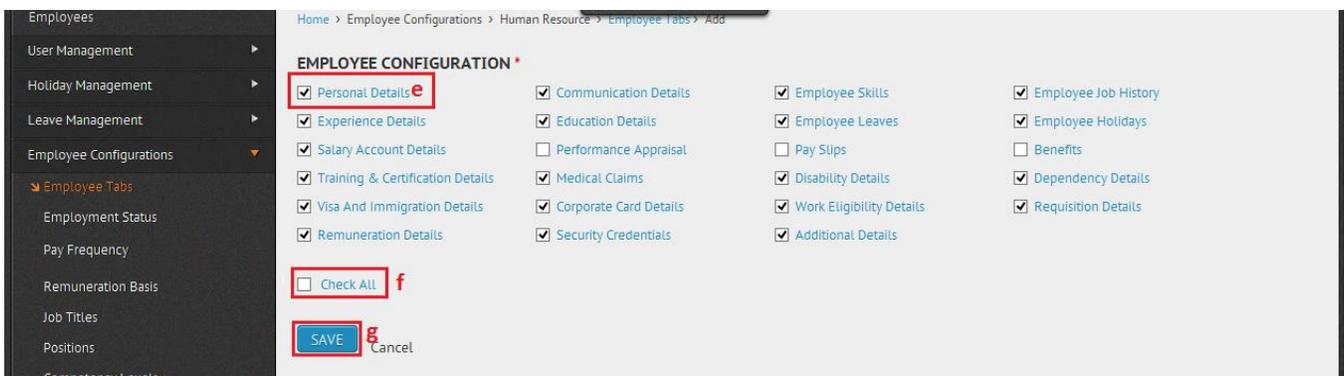


Figure 6.1

## Add an Organization

- Click on 'Organization' in the top menu
- The left side panel will display the submenus
- Click on Organization Info
- Click on Click Here link in the right side panel
- Enter the required details
- Upload your organization logo
- Click on save after filling in all the details.

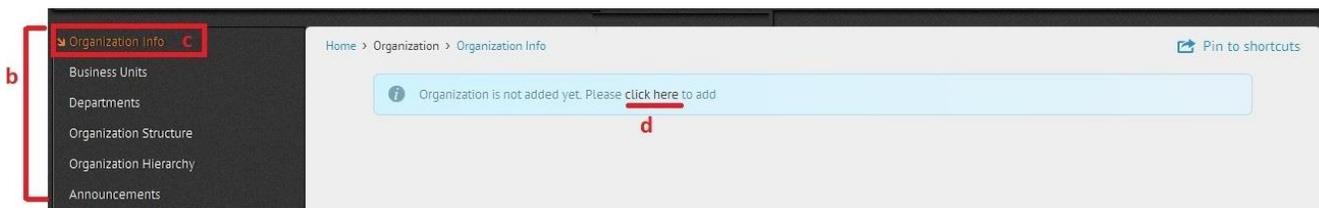


Figure 7

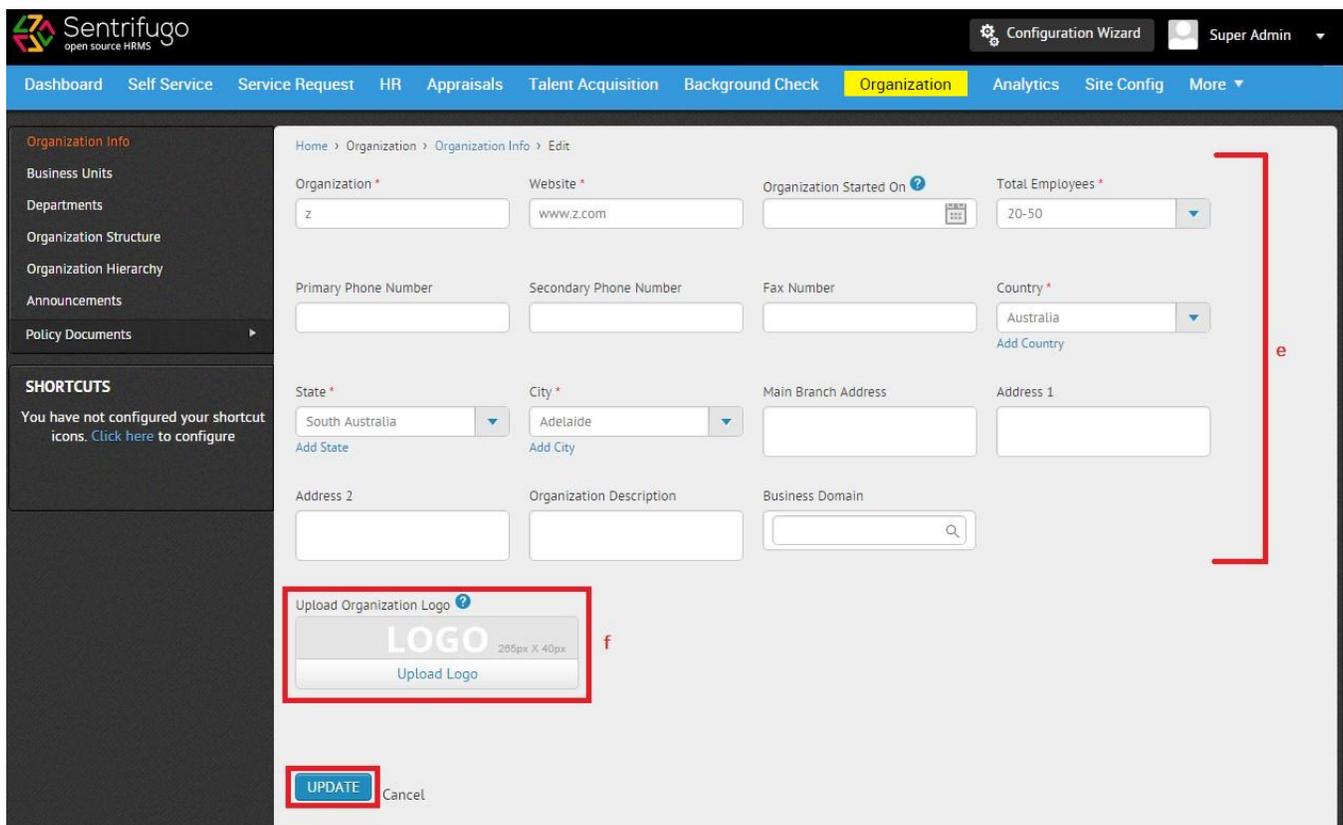



Figure 7.1

## 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

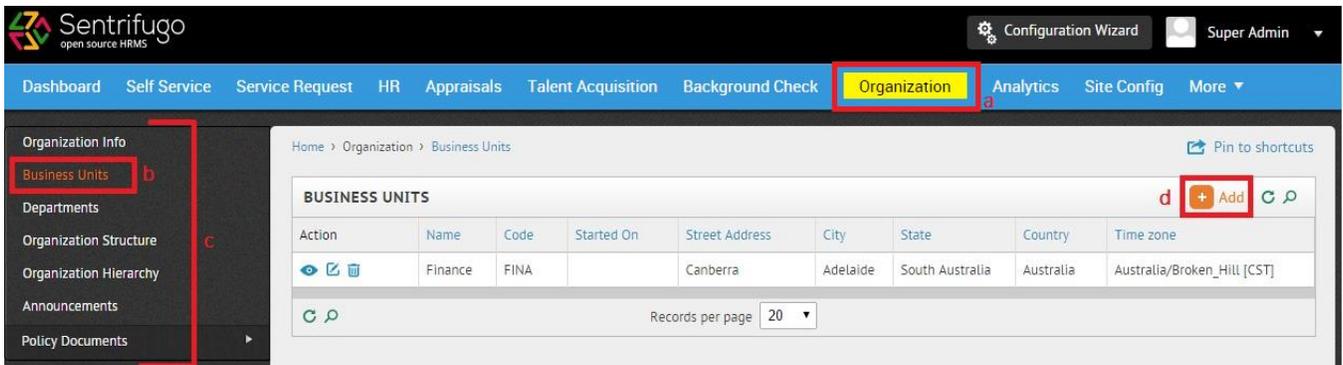


Figure 8

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

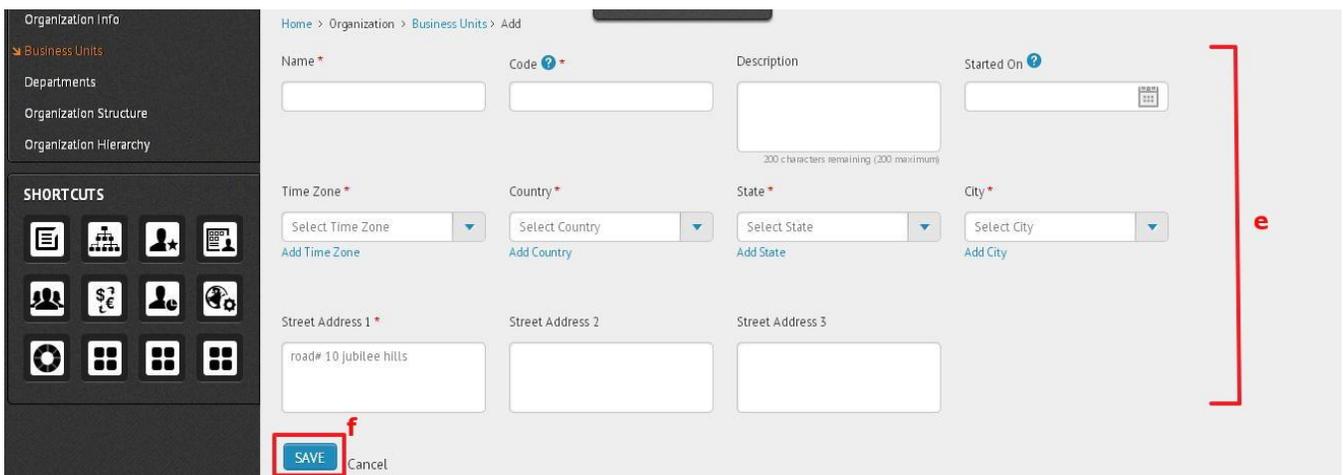


Figure 8.1

## Add Departments

- Click on Organization in the top menu
- The left side panel will display the submenus
- Click on Departments
- Click on Add button on the right side panel

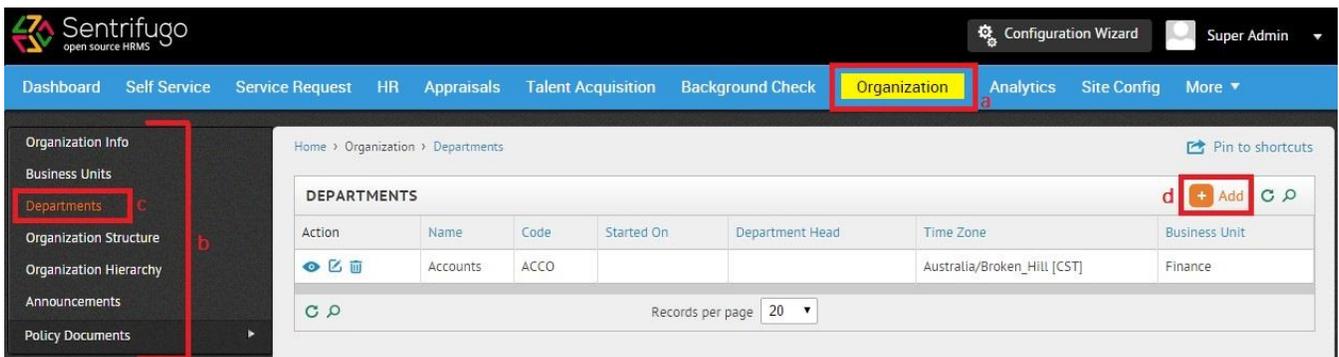


Figure 9

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

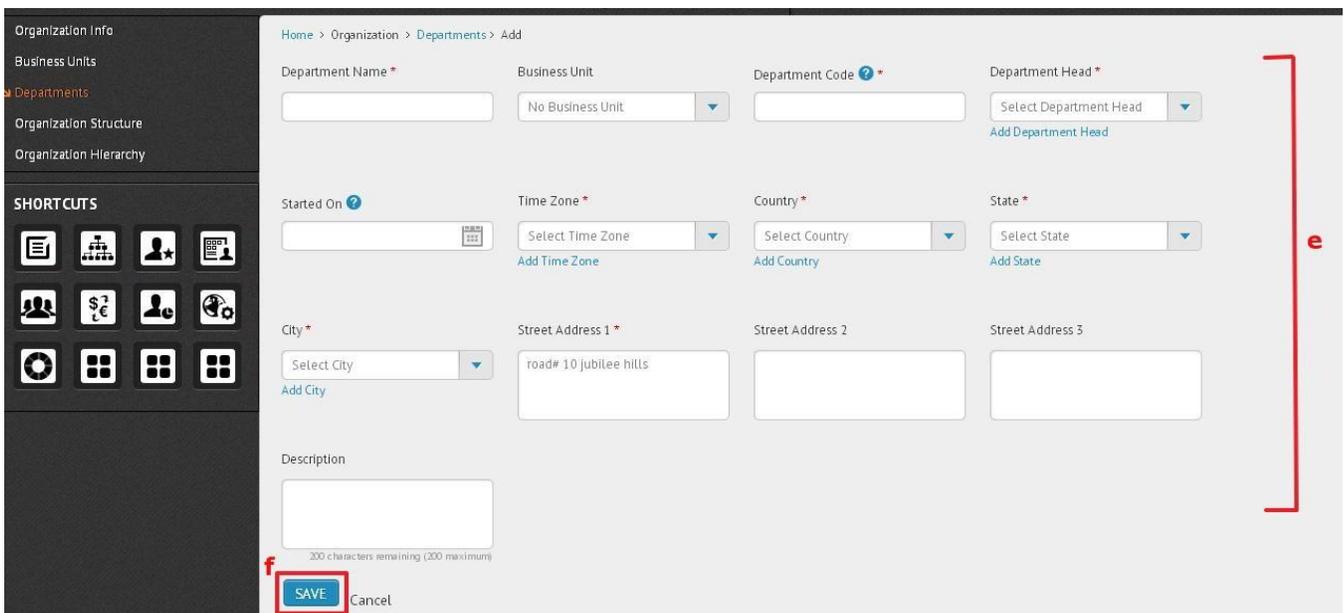


Figure 9.1

## 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

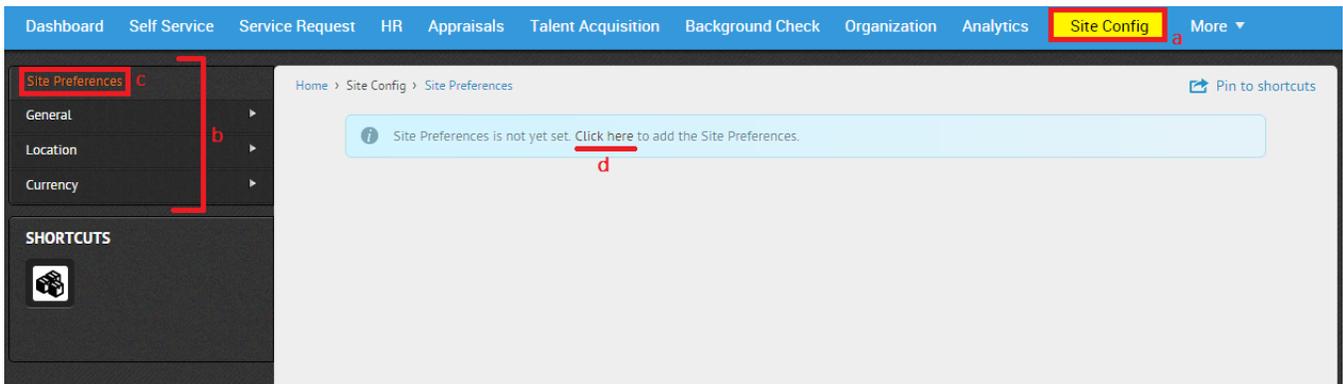


Figure 10

- 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

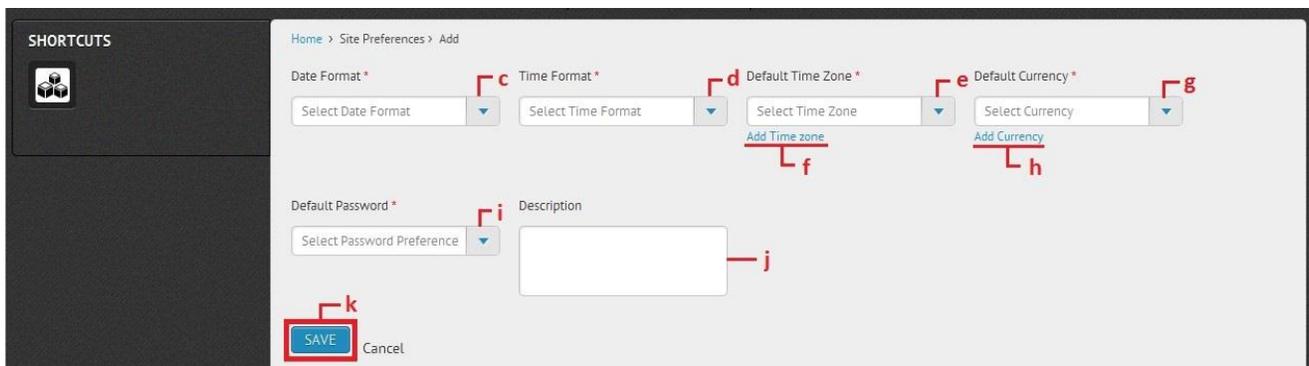


Figure 10.1

## Activate and In-activate Modules

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

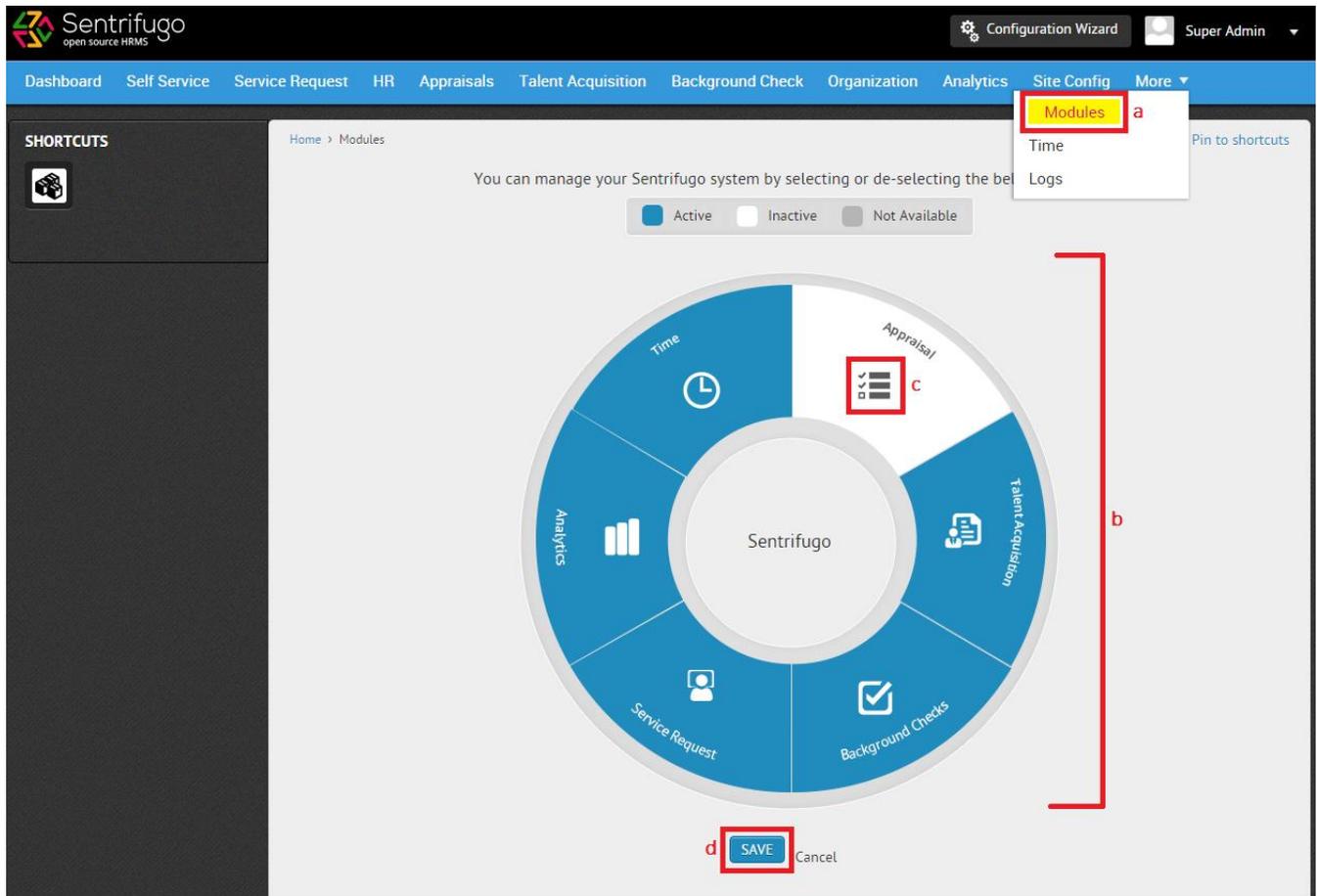
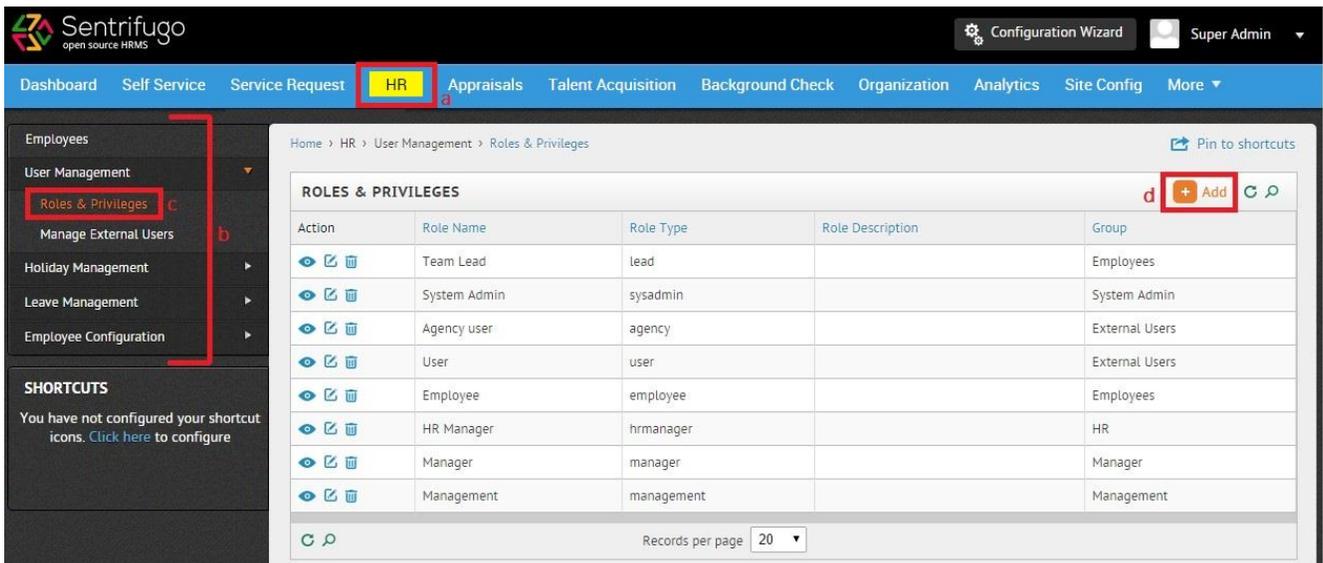


Figure 11

## 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



Home > HR > User Management > Roles & Privileges

**ROLES & PRIVILEGES**

Action	Role Name	Role Type	Role Description	Group
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Team Lead	lead		Employees
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	System Admin	sysadmin		System Admin
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Agency user	agency		External Users
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	User	user		External Users
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Employee	employee		Employees
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	HR Manager	hrmanager		HR
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Manager	manager		Manager
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Management	management		Management

Records per page: 20

Figure 12

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

Refer Figure 12.1

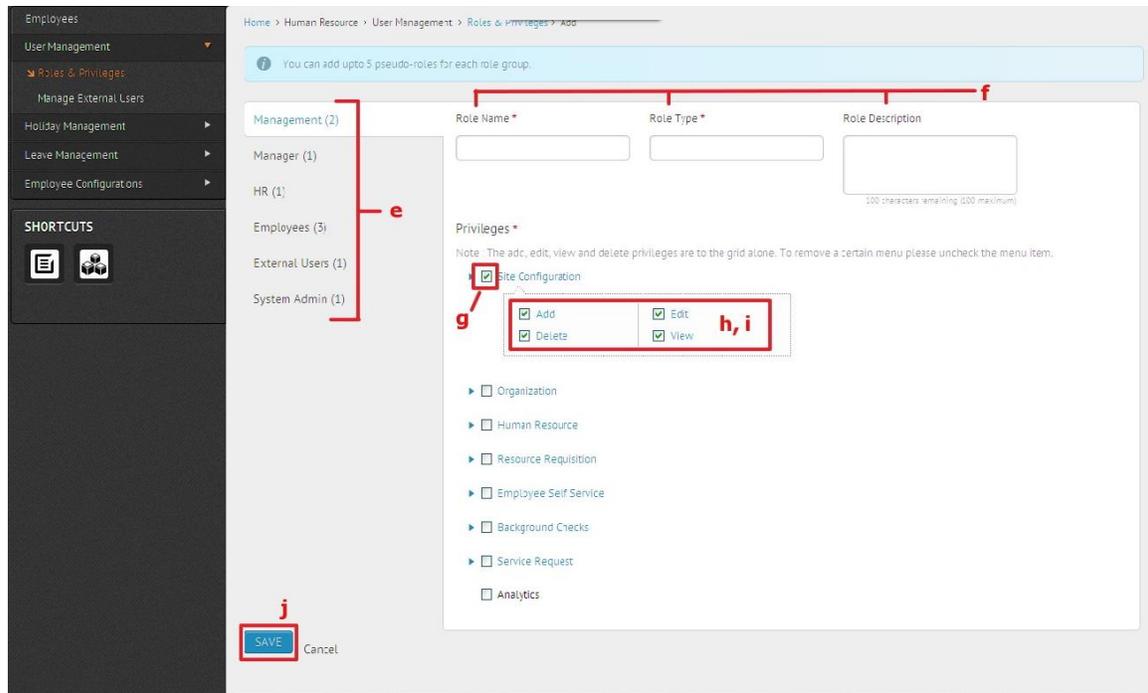


Figure 12.1

## Add an External User

- Click on HR 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

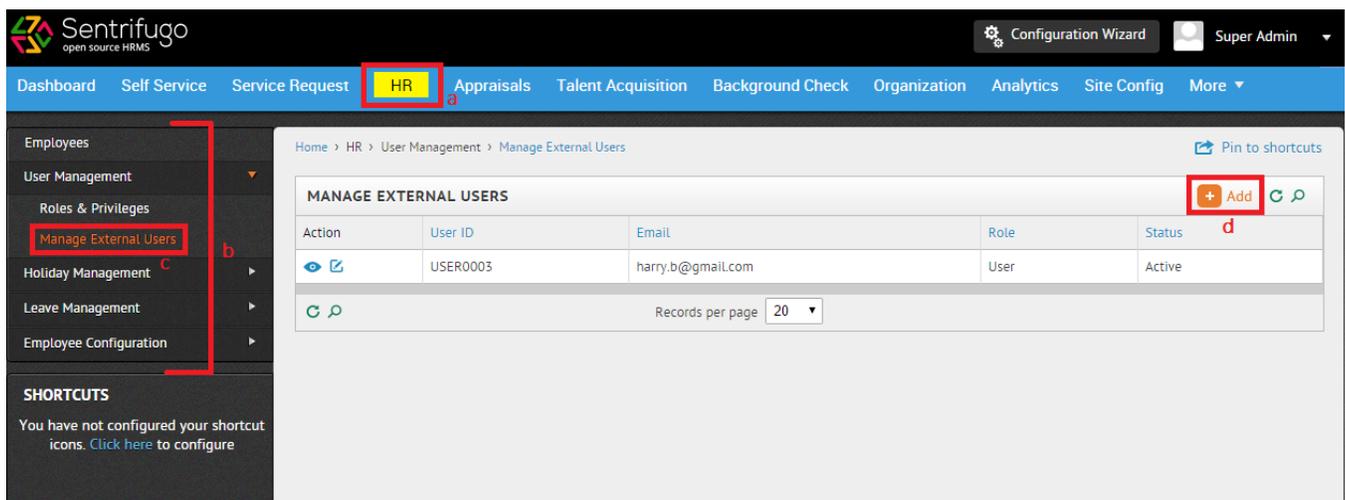


Figure 12.2

- 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

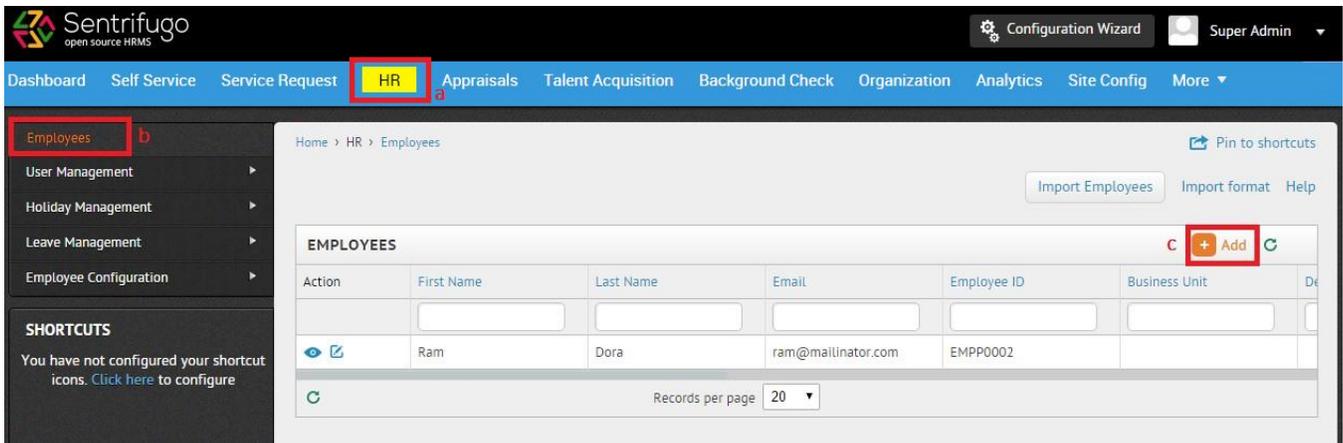


Figure 13

- 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

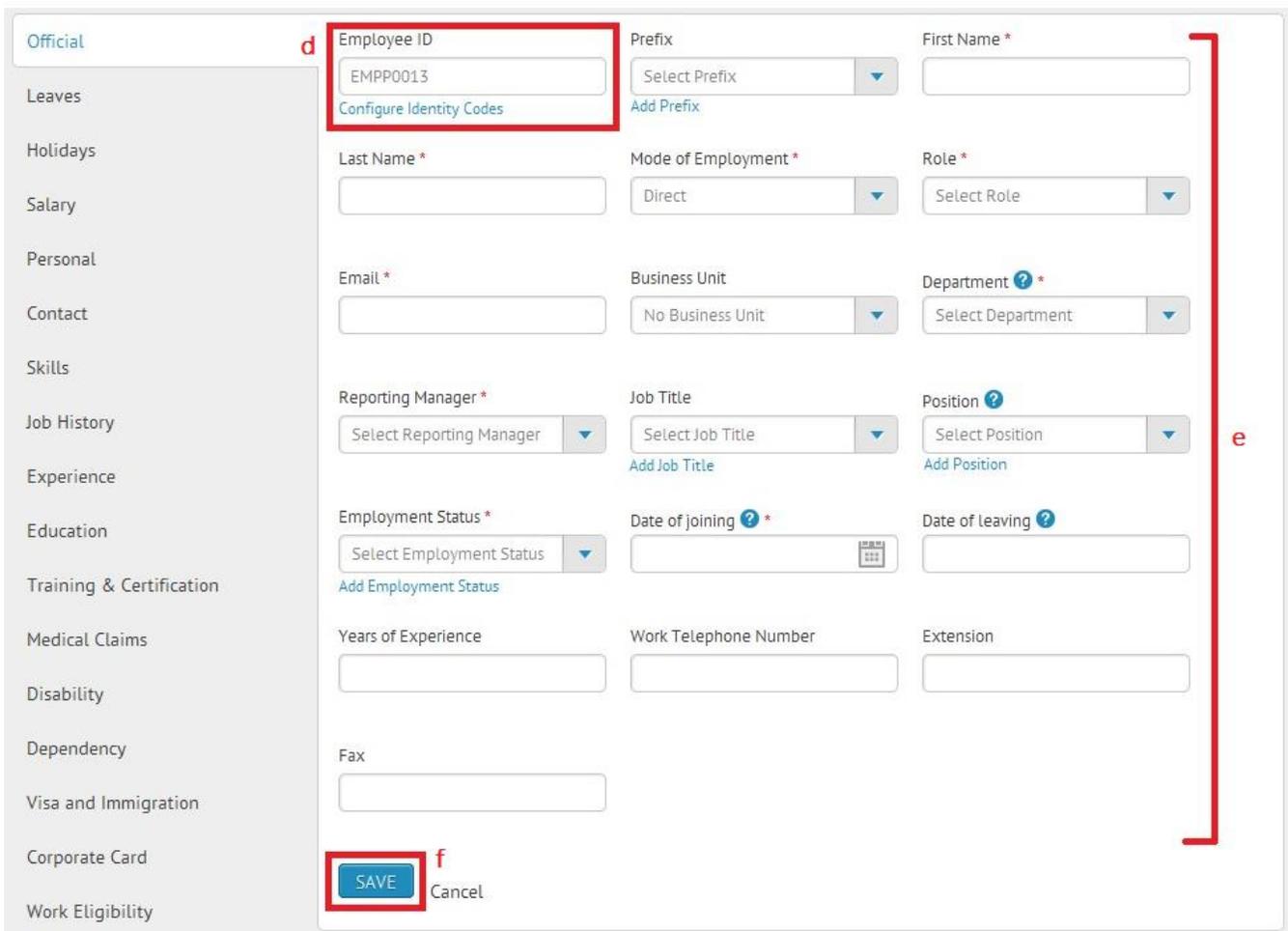


Figure 13.1

## Update My Details

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

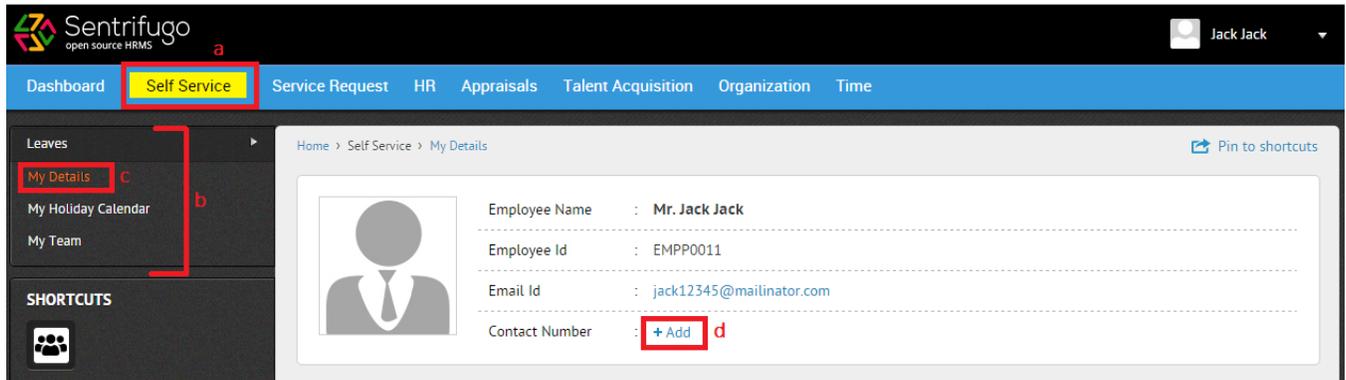


Figure 14

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

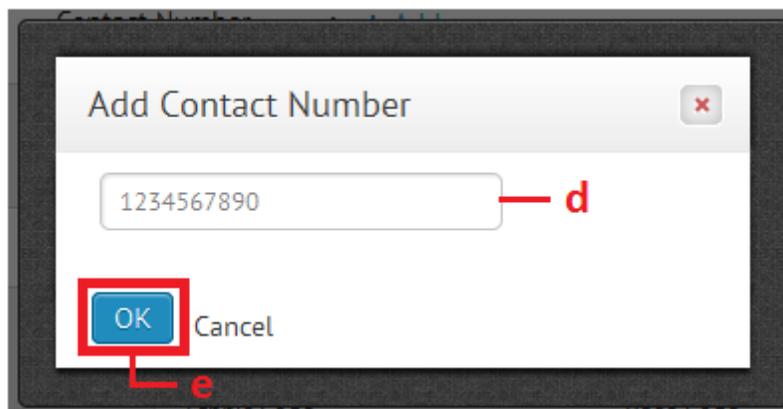
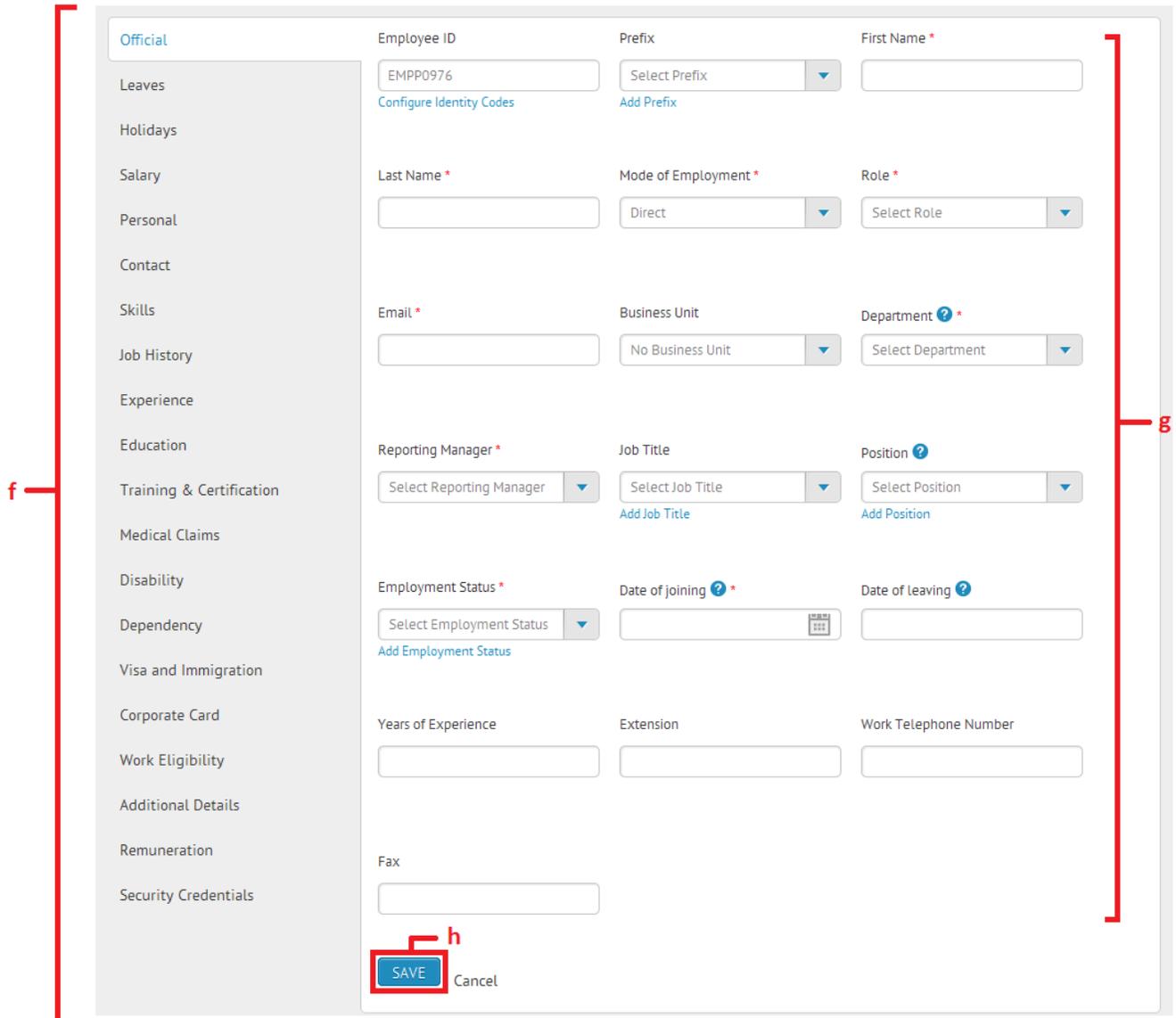


Figure 14.1

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



The screenshot shows the 'Official' tab of an employee profile form. The form is organized into several sections:

- Employee ID:** Input field containing 'EMPP0976'. Below it is a link 'Configure Identity Codes'.
- Prefix:** Dropdown menu with 'Select Prefix' and a link 'Add Prefix'.
- First Name \*:** Empty input field.
- Last Name \*:** Empty input field.
- Mode of Employment \*:** Dropdown menu with 'Direct'.
- Role \*:** Dropdown menu with 'Select Role'.
- Email \*:** Empty input field.
- Business Unit:** Dropdown menu with 'No Business Unit'.
- Department \*:** Dropdown menu with 'Select Department'.
- Reporting Manager \*:** Dropdown menu with 'Select Reporting Manager'.
- Job Title:** Dropdown menu with 'Select Job Title' and a link 'Add Job Title'.
- Position \*:** Dropdown menu with 'Select Position' and a link 'Add Position'.
- Employment Status \*:** Dropdown menu with 'Select Employment Status' and a link 'Add Employment Status'.
- Date of joining \*:** Date picker field.
- Date of Leaving \*:** Empty input field.
- Years of Experience:** Empty input field.
- Extension:** Empty input field.
- Work Telephone Number:** Empty input field.
- Fax:** Empty input field.

At the bottom of the form, there is a blue 'SAVE' button (labeled 'h') and a 'Cancel' button. A red bracket on the left side of the form is labeled 'f', and a red bracket on the right side is labeled 'g'.

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

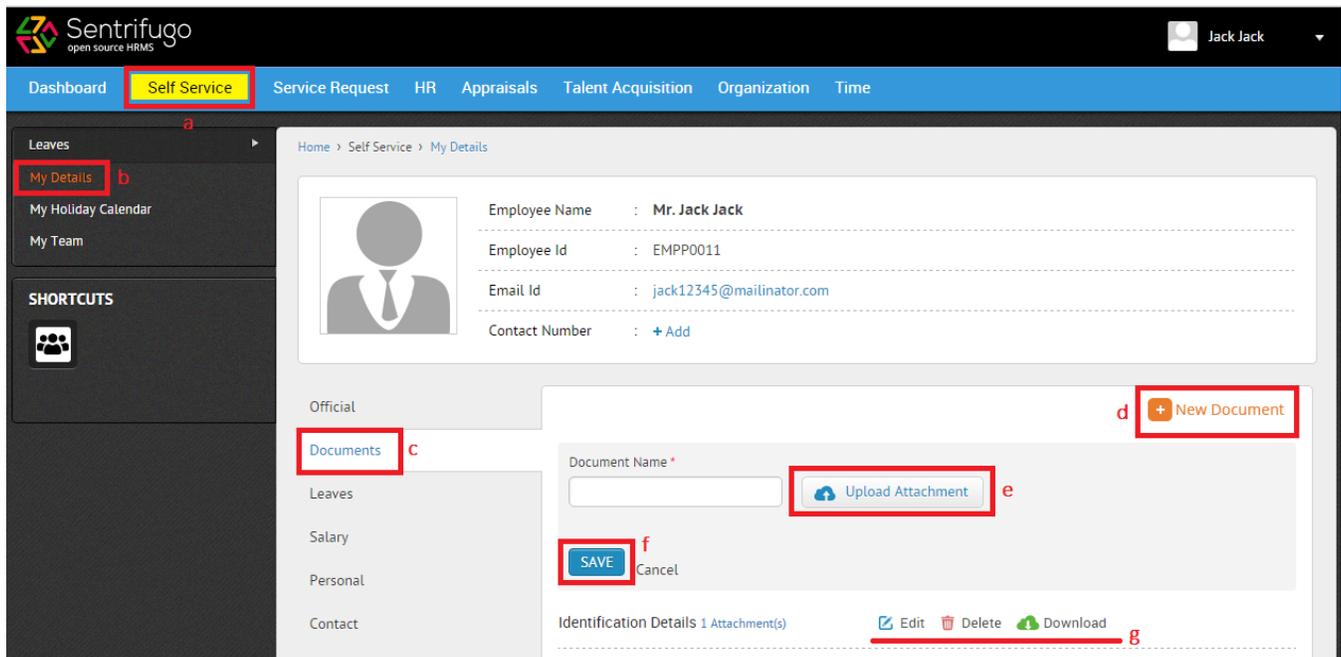


Figure 15

## Add Leave Management Options

- Click on HR in the top menu
- The left side panel will display the submenus
- Click on Leave Management Options
- Click on Add button in the right side panel

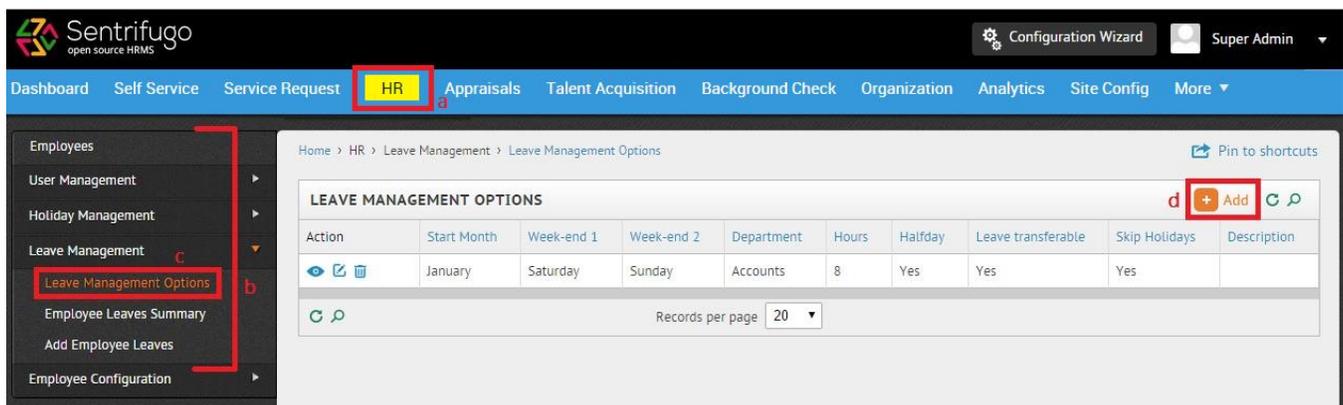
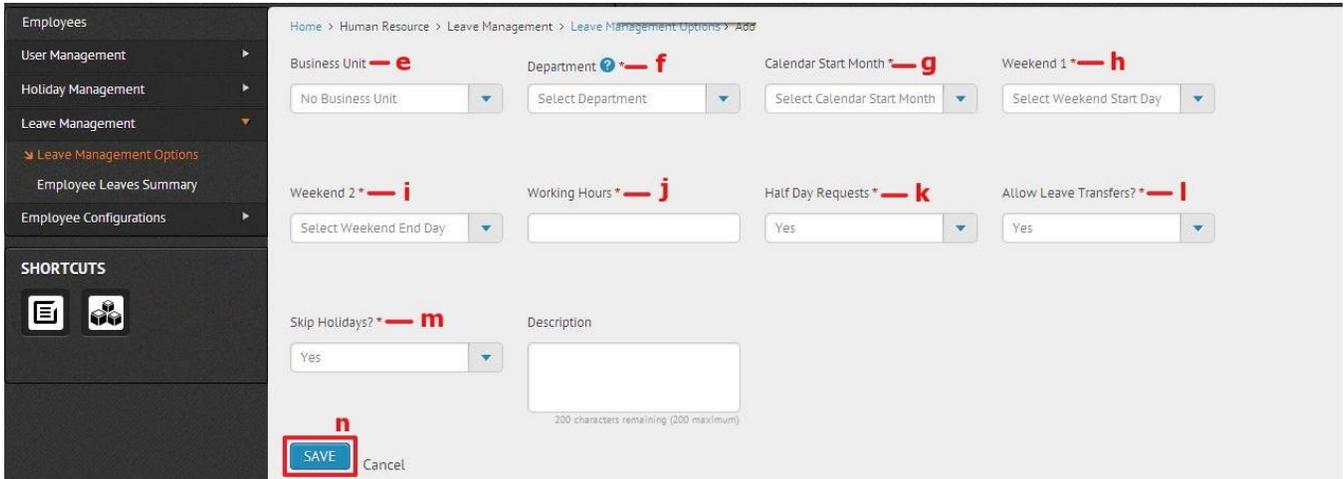


Figure 16

- Select a business unit from Business Unit dropdown
- Select a department from department dropdown
- Select month from Calendar Start Month dropdown
- Select weekend1 from Weekend1 dropdown
- Select weekend2 from Weekend2 dropdown
- Enter number of working hours
- Provide permissions for Half Day Requests
- Provide permissions to Allow Leave Transfers
- Provide permissions to Skip Holidays
- Click Save button to add leave management options for department

Refer figure 16.1



Home > Human Resource > Leave Management > Leave Management Options > Add

Business Unit <sup>e</sup>  Department <sup>f</sup>  Calendar Start Month <sup>g</sup>  Weekend 1 <sup>h</sup>

Weekend 2 <sup>i</sup>  Working Hours <sup>j</sup>  Half Day Requests <sup>k</sup>  Allow Leave Transfers? <sup>l</sup>

Skip Holidays? <sup>m</sup>  Description   
200 characters remaining (200 maximum)

<sup>n</sup>  Cancel

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

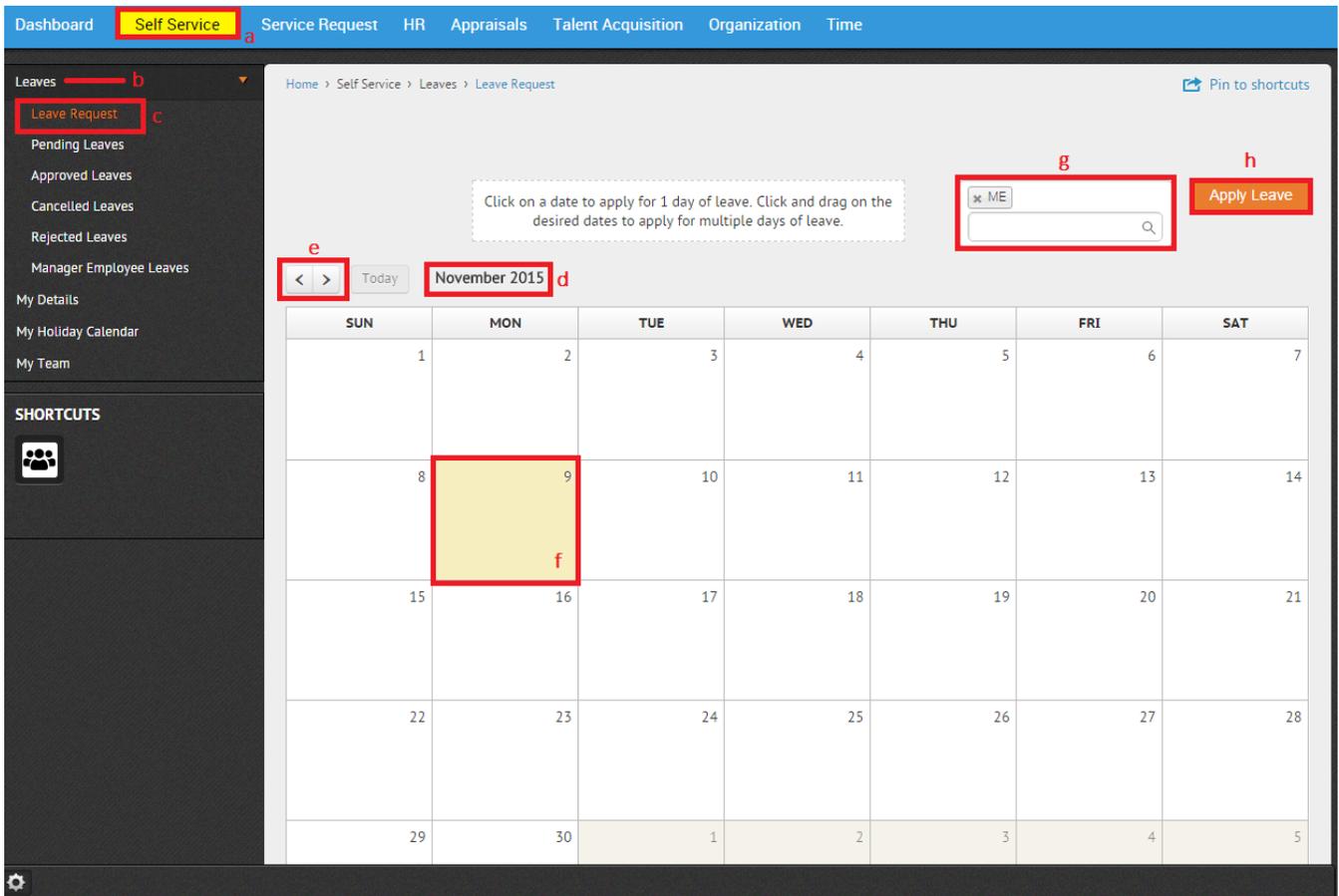


Figure 17

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

Refer Figure 17.1

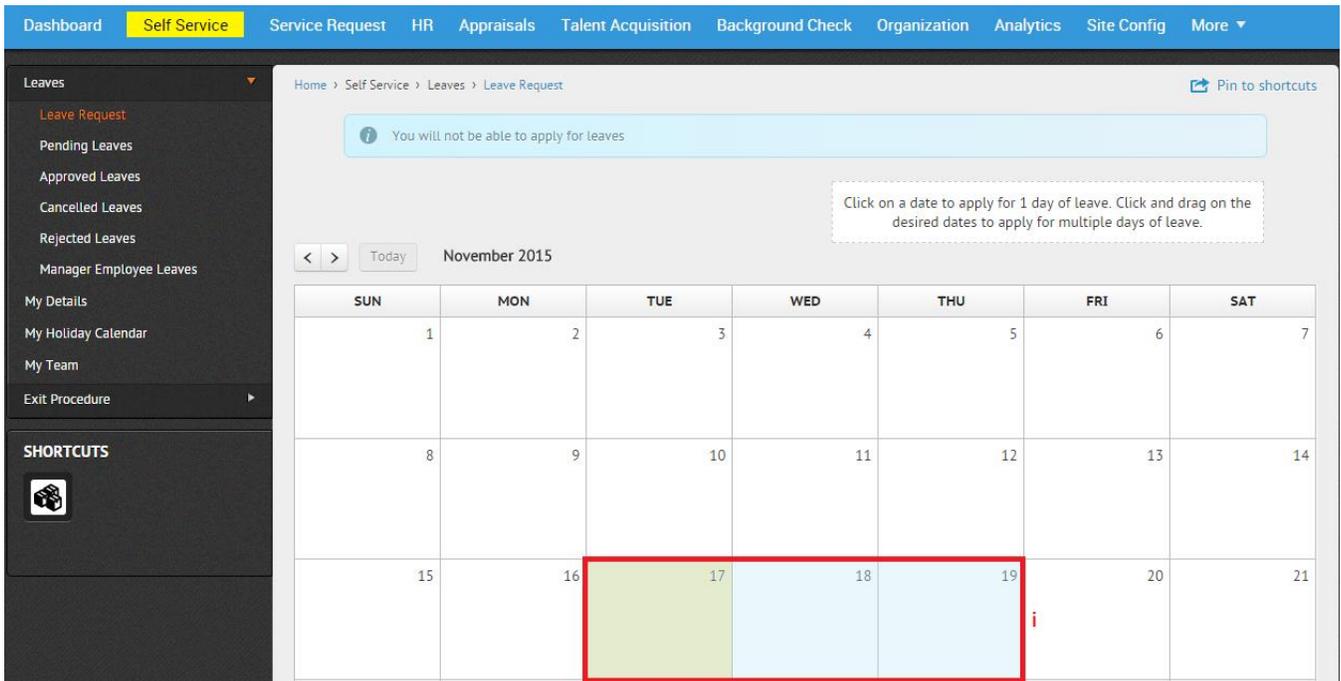


Figure 17.1

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

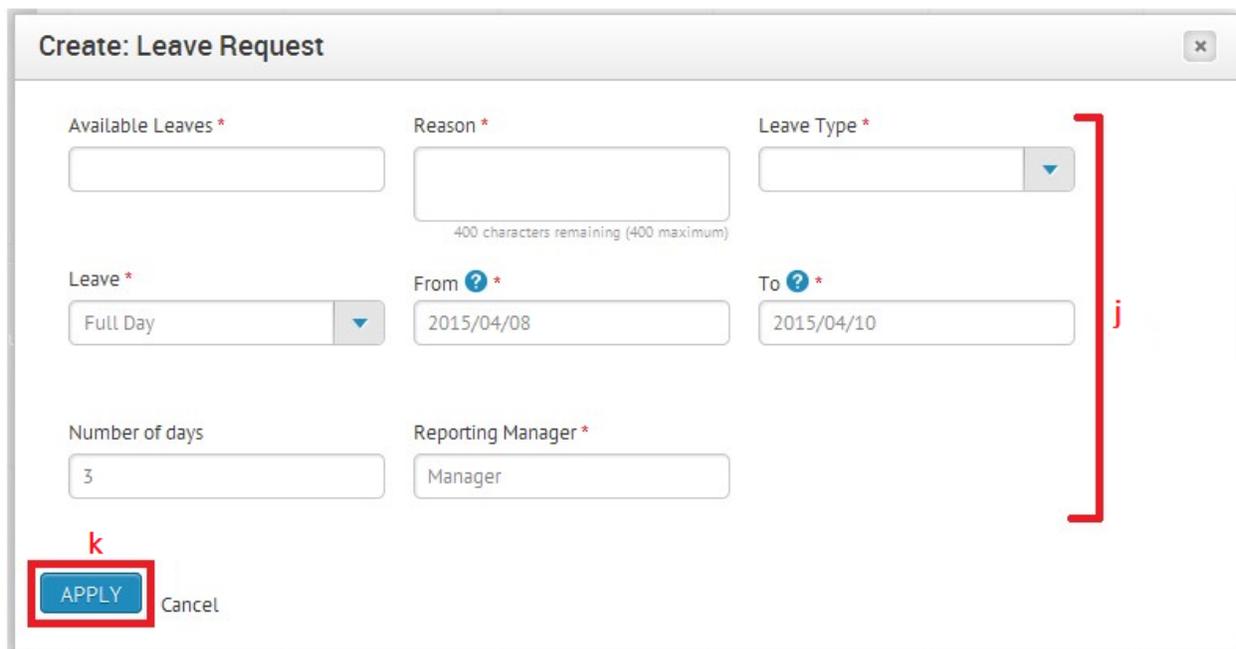


Figure 17.2

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

The screenshot displays the 'Leave Request' page in the Sentrifugo HRMS. On the left, a sidebar contains navigation options like 'Leave Request', 'Pending Leaves', and 'Manager Employee Leaves'. The main area shows a calendar for October 2015. A search filter is active, showing 'ME' and 'Employee Reporting To Me'. The calendar grid shows leave requests for several employees: Ron Born (Tuesdays 29, 30, 31), Robert Anderson (Wednesdays 14, 20), and Jony Lydia (Monday 5). A 'Pin to shortcuts' button and an 'Apply Leave' button are also visible.

SUN	MON	TUE	WED	THU	FRI	SAT
27	28	29 Ron Born, Leave	30 Ron Born, Leave	1 Robert Anderson, Leave	2 Chandini Jayaram Robert Anderson, Leave	3
4	5 Jony Lydia, Leave	6	7	8	9	10
11	12	13 Robert Anderson, Leave	14	15	16	17
18	19	20	21	22	23	24

Figure 17.3

## Cancel my Leave Request

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

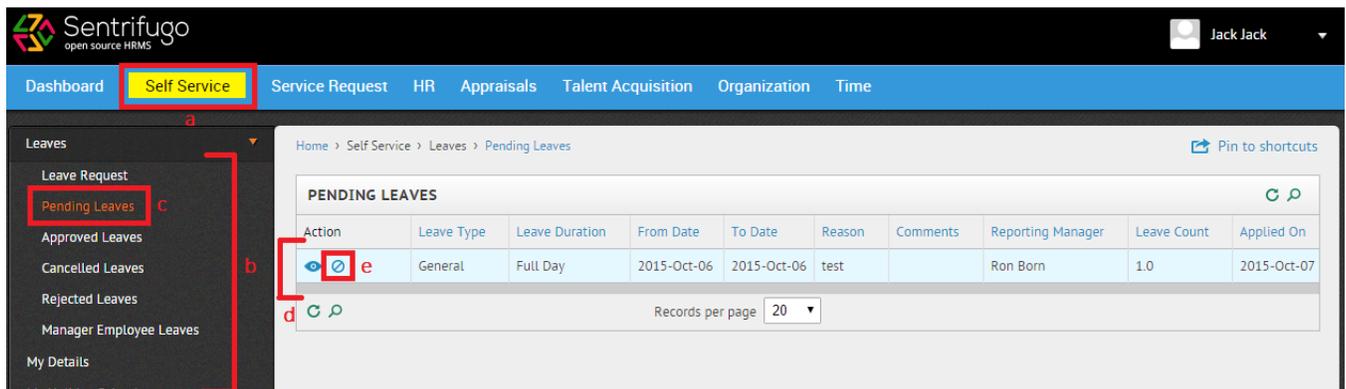


Figure 17.4

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

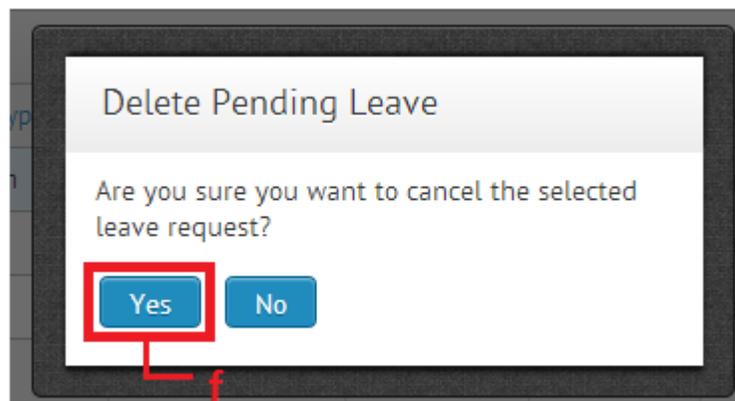
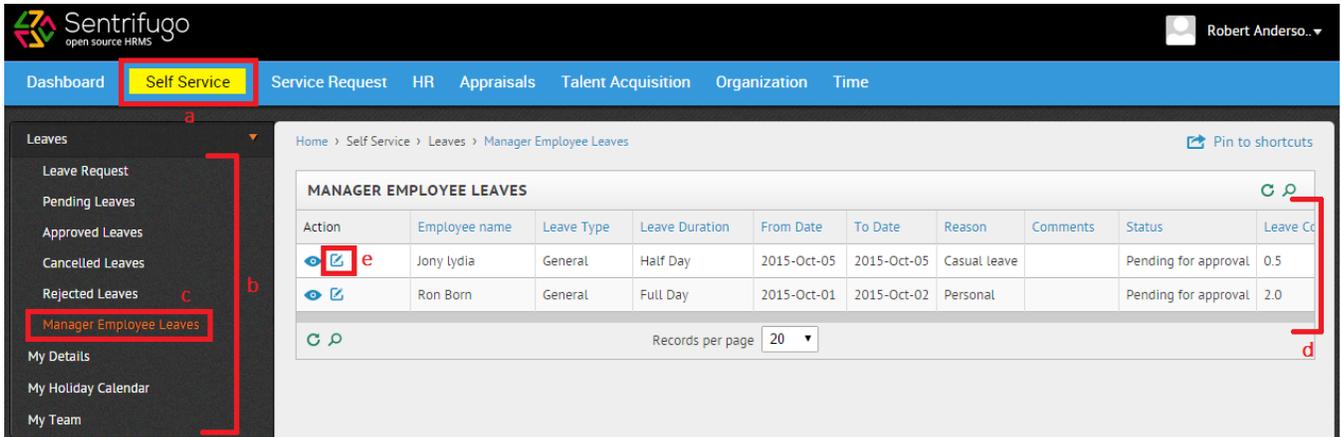


Figure 17.5

## Approve or Reject Leave Requests

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



Home > Self Service > Leaves > Manager Employee Leaves

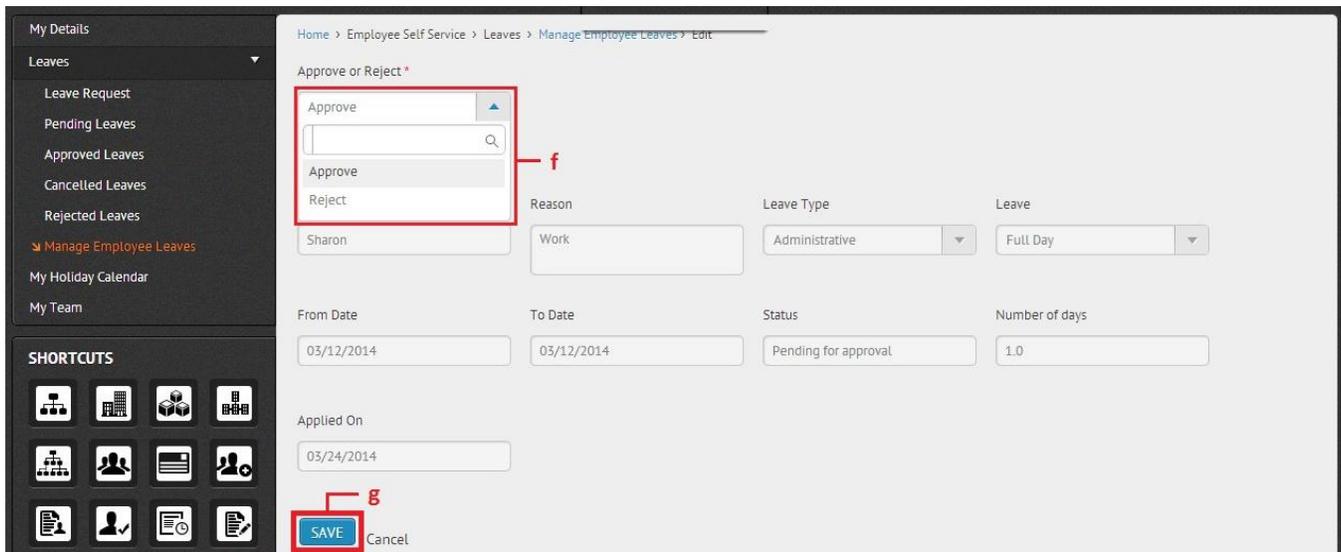
**MANAGER EMPLOYEE LEAVES**

Action	Employee name	Leave Type	Leave Duration	From Date	To Date	Reason	Comments	Status	Leave Co
 e	Jony Lydia	General	Half Day	2015-Oct-05	2015-Oct-05	Casual leave		Pending for approval	0.5
	Ron Born	General	FULL Day	2015-Oct-01	2015-Oct-02	Personal		Pending for approval	2.0

Records per page: 20

Figure 17.6

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



Home > Employee Self Service > Leaves > Manage Employee Leaves > Edit

Approve or Reject \*

Approve

Approve

Reject

Reason: Sharon

Leave Type: Administrative

Leave: Full Day

From Date: 03/12/2014

To Date: 03/12/2014

Status: Pending for approval

Number of days: 1.0

Applied On: 03/24/2014

**SAVE** Cancel

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

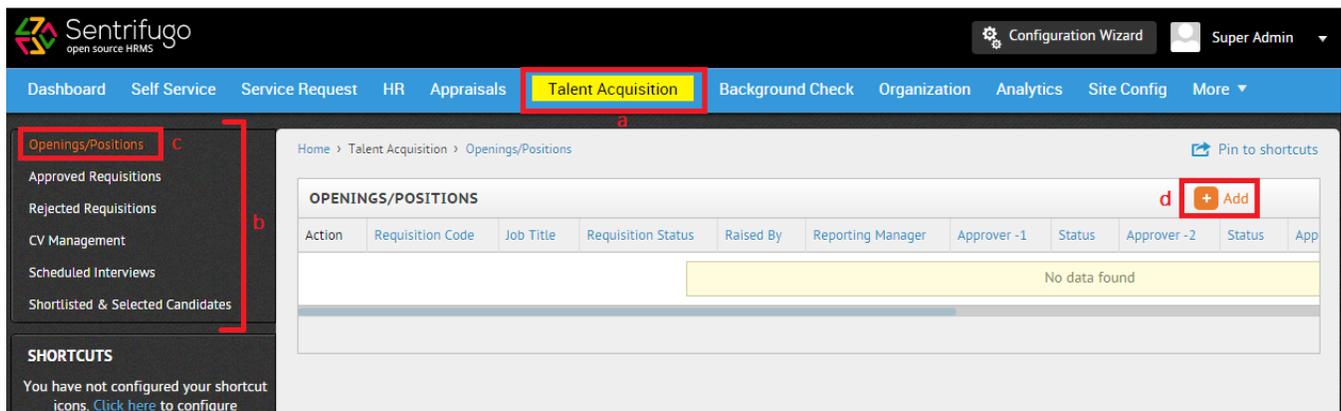
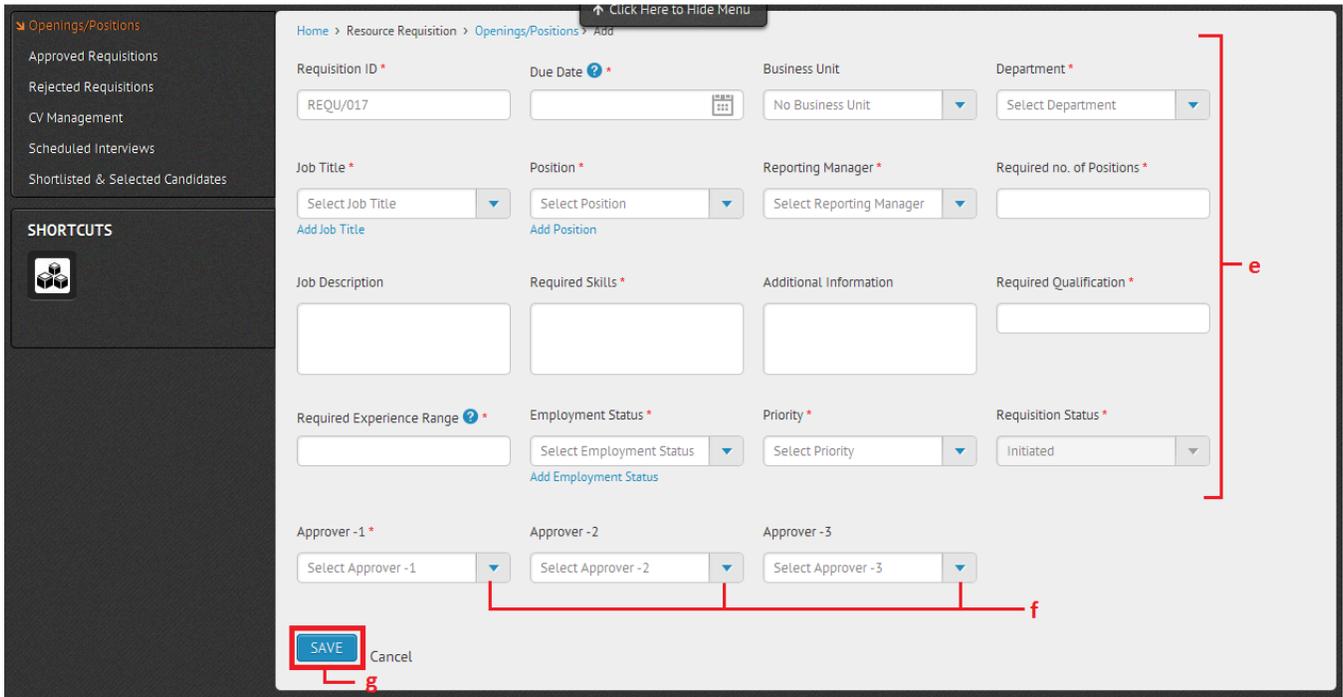


Figure 18

- 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



Home > Resource Requisition > Openings/Positions > Add

Click Here to Hide Menu

Requisition ID \* Due Date \* Business Unit Department \*

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

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

Required Experience Range \* Employment Status \* Priority \* Requisition Status \*

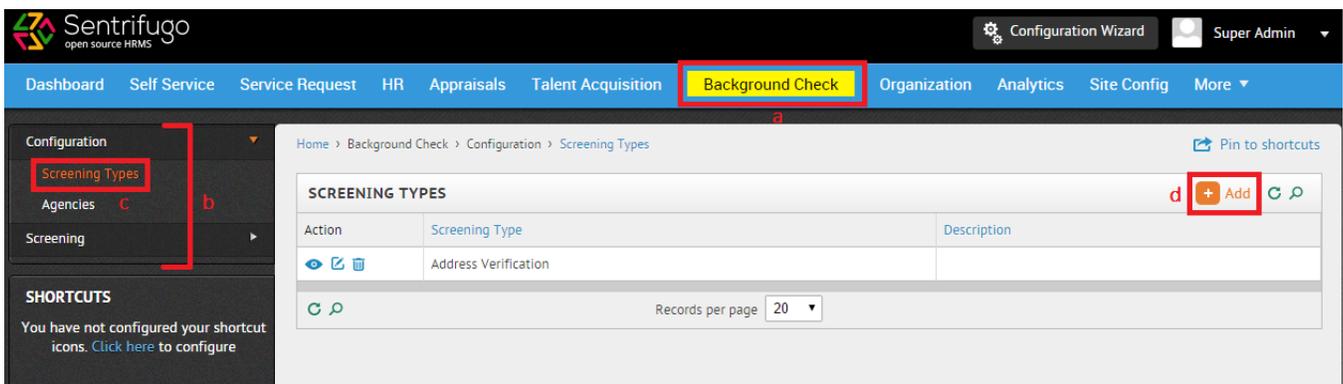
Approver -1 \* Approver -2 Approver -3

**SAVE** Cancel

Figure 18.1

## Add Screening Type for Background Checks

- Click on Background Check in the top menu
- The left side panel will display the submenus
- Click on Screening Types
- Click on Add button in the right side panel



Configuration Wizard Super Admin

Dashboard Self Service Service Request HR Appraisals Talent Acquisition **Background Check** Organization Analytics Site Config More

Home > Background Check > Configuration > Screening Types

SCREENING TYPES

Action	Screening Type	Description
  	Address Verification	

Records per page 20

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

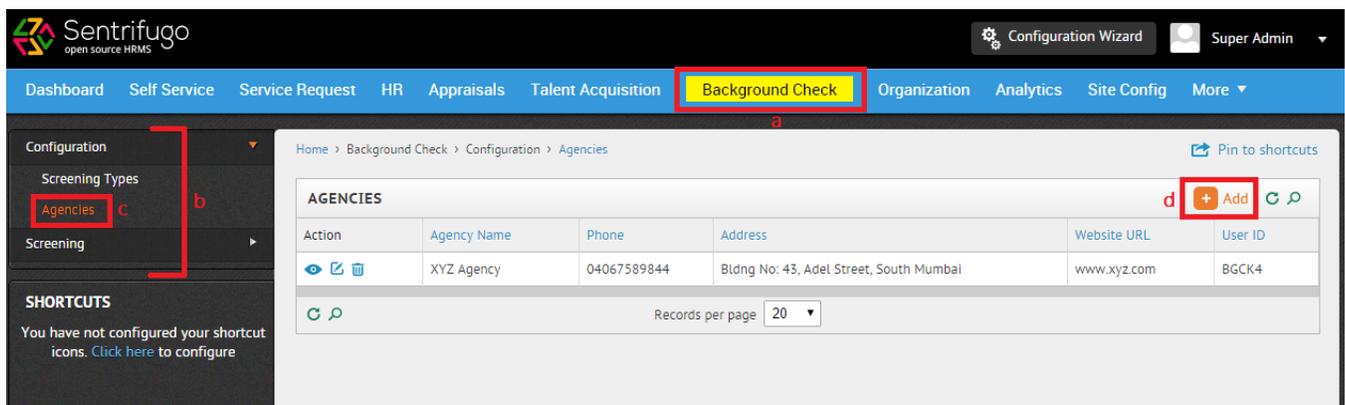


Figure 18.4

- 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

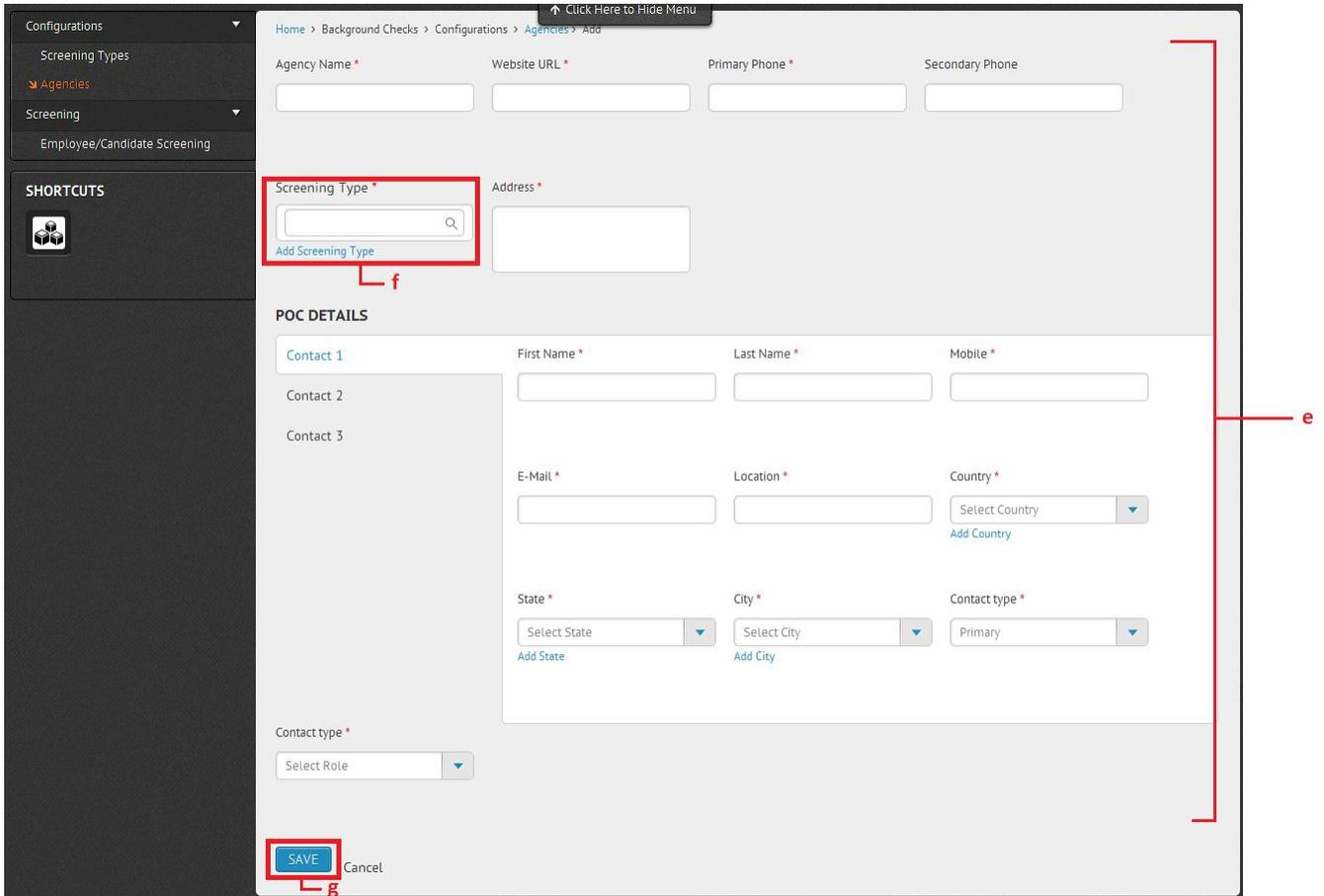


Figure 18.5

## 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

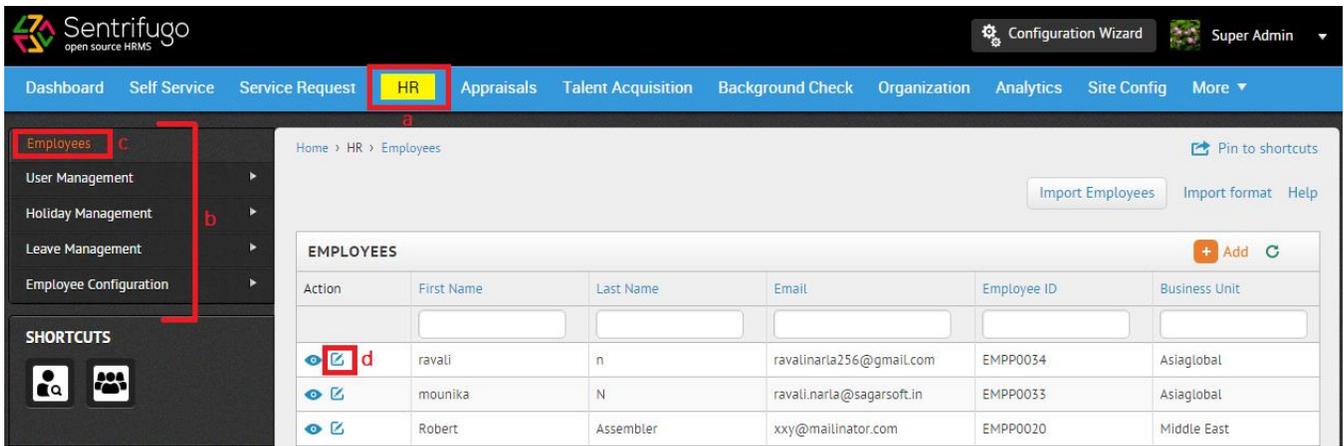


Figure 18.6

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

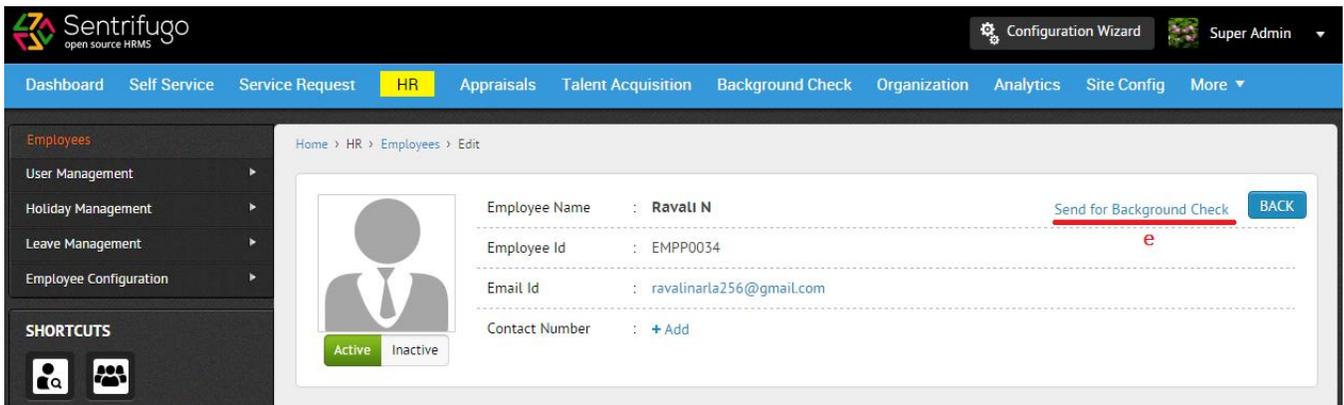


Figure 18.7

## View & Generate Reports

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

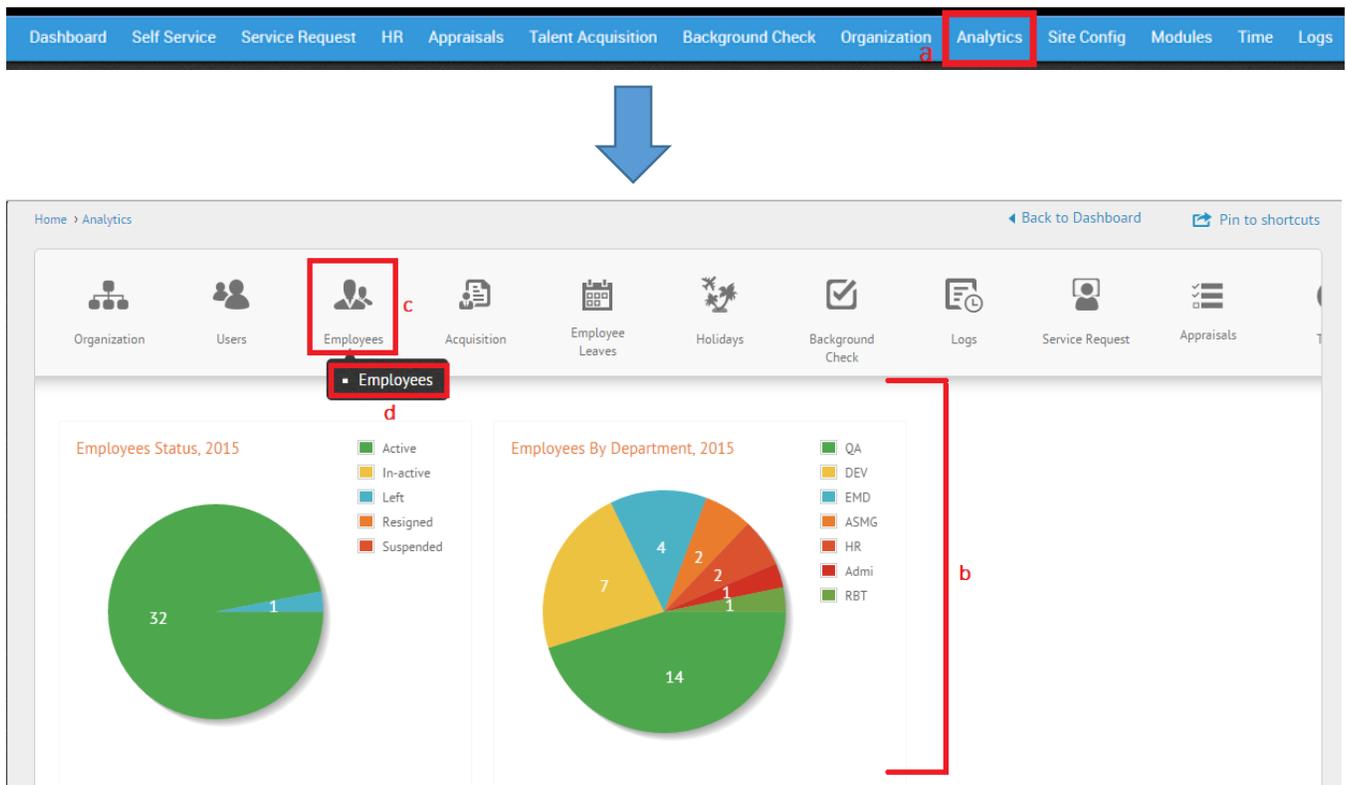


Figure 19

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

Refer Figure 19.1

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

#### Generate Custom Report

Reporting Manager

Department  
Select Department ▼

Role  
Select Role ▼

Job Title  
Select Job Title ▼

Position  
Select Position ▼

Employment Status  
Select Employment Status ▼

Joined Date

Mode of Employment  
Select Mode Of Employ... ▼

GENERATE REPORT   Reset

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	emp12@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	emp3@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	hrmsemmployee001@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	empp1@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

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

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

**Generate Custom Report**

Reporting Manager

Department

Role

Job Title

Position

Employment Status

Joined Date

Mode of Employment

GENERATE REPORT Reset

**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. gfgrfdg	gf@example.com	--	Employee	Anderson neo	Quality controller	Sr QC

Records per page  ◀◀ Page 1 of 2 ▶▶

Figure 19.2

## 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.

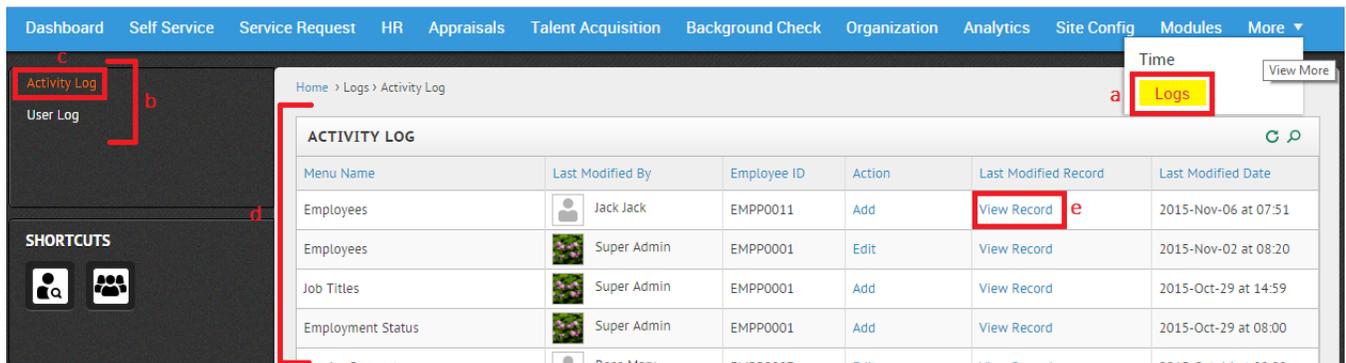


Figure 20

## 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

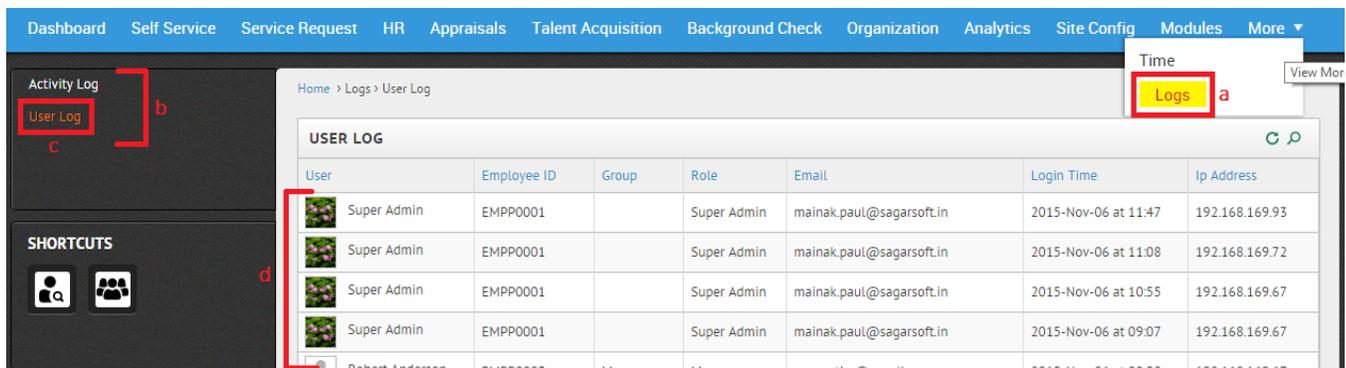


Figure 20.1

## 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

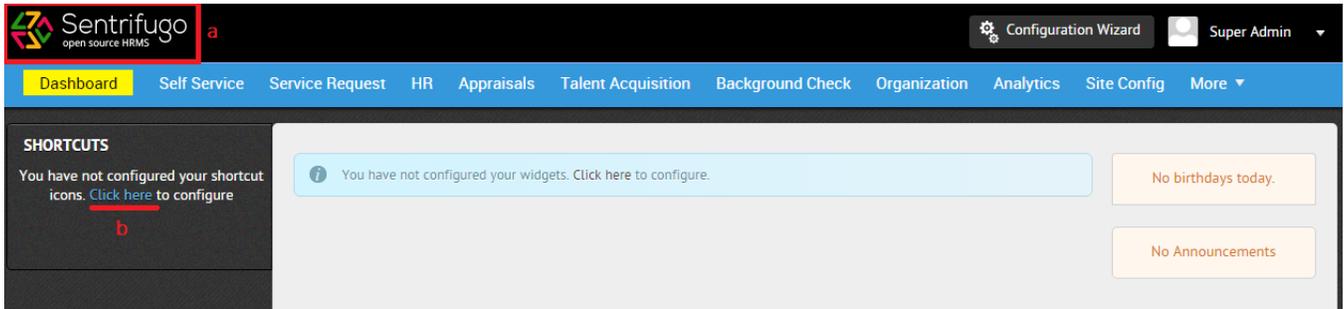


Figure 21

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

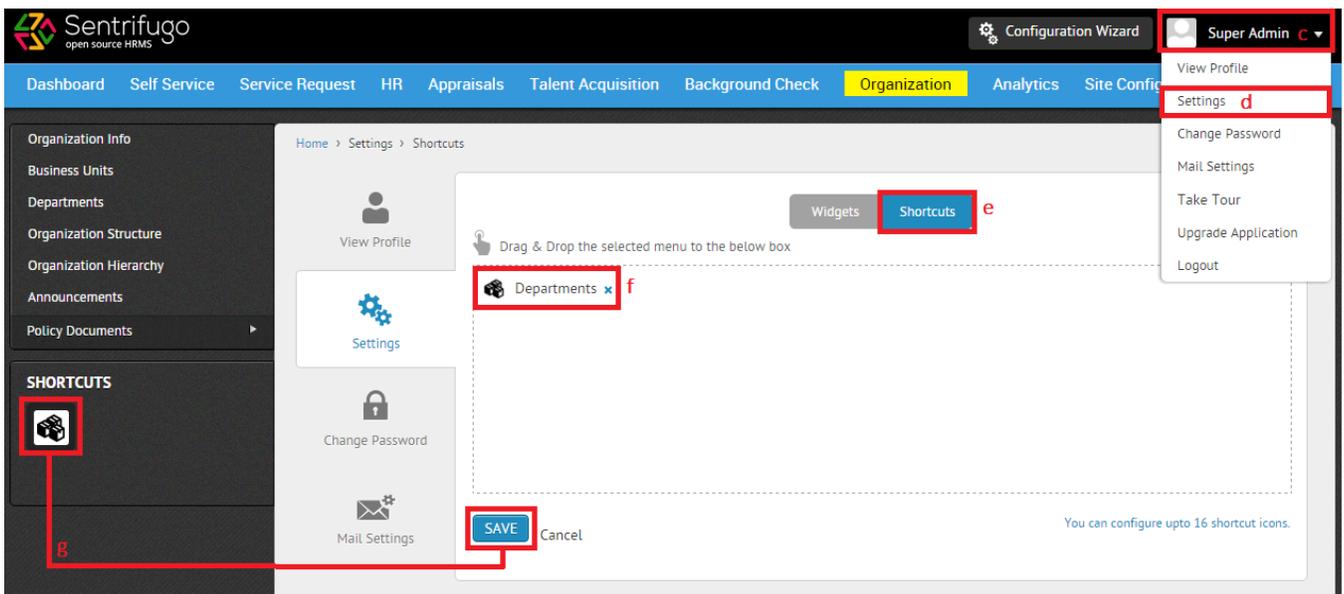


Figure 21.1

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

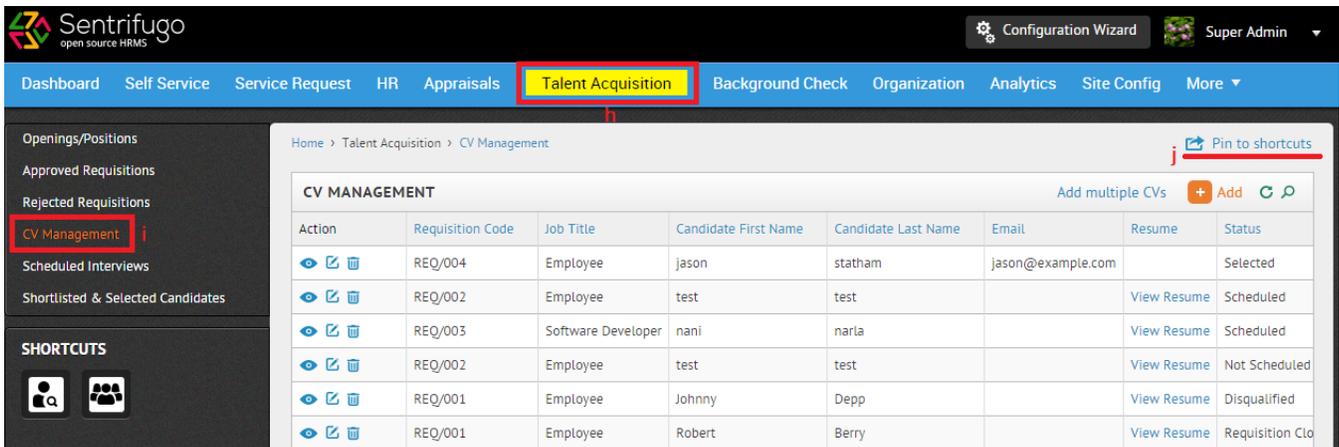


Figure 21.2

## 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

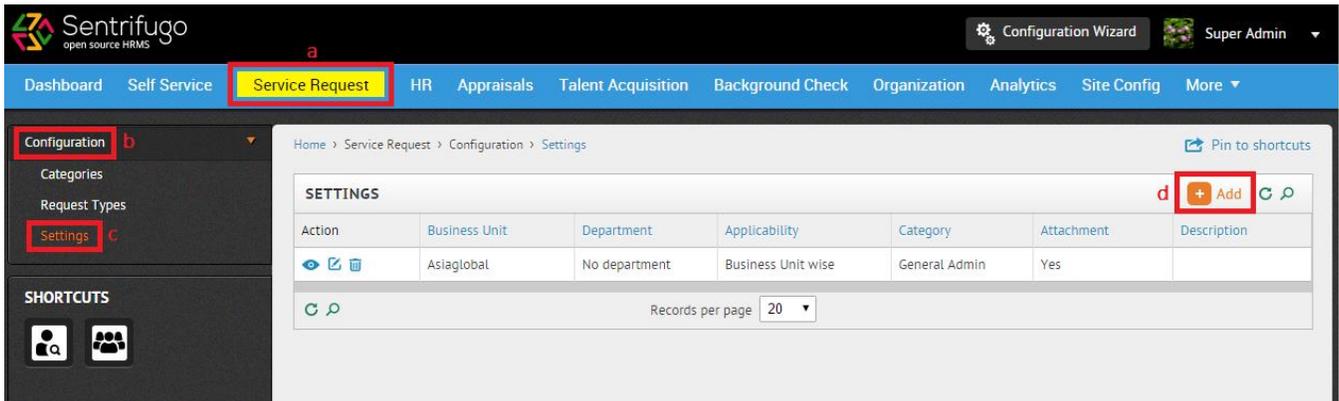


Figure 22

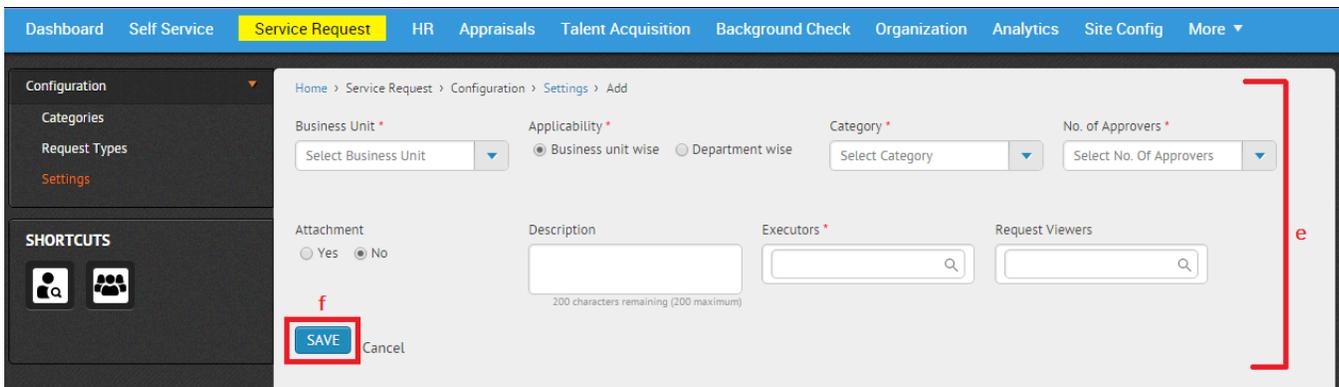


Figure 22.1

## 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

- Click on HR in the top menu
- Click on Employees submenu on the left side panel
- Click on Import Format link above the employee details grid on the right side to download the format
- For further guidance, click on the **Help** link

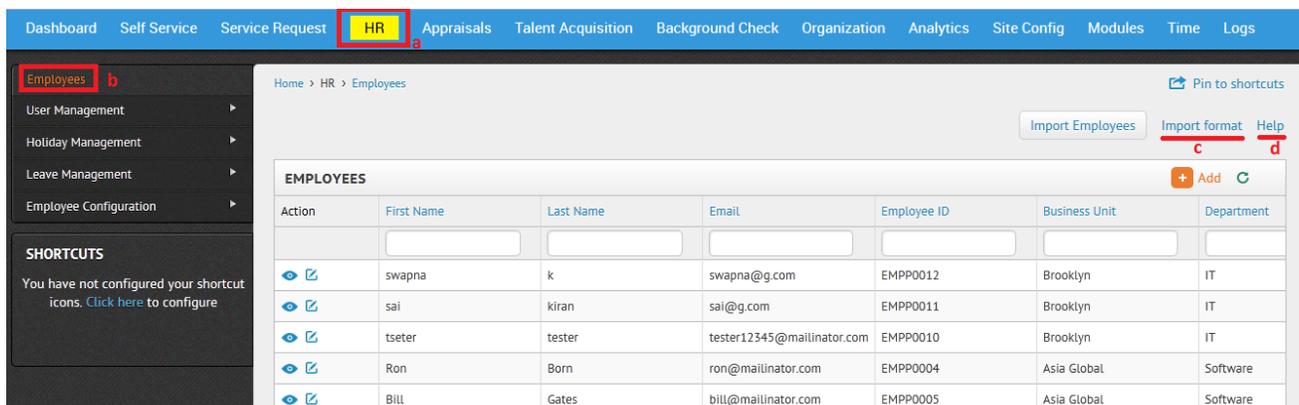


Figure 24

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



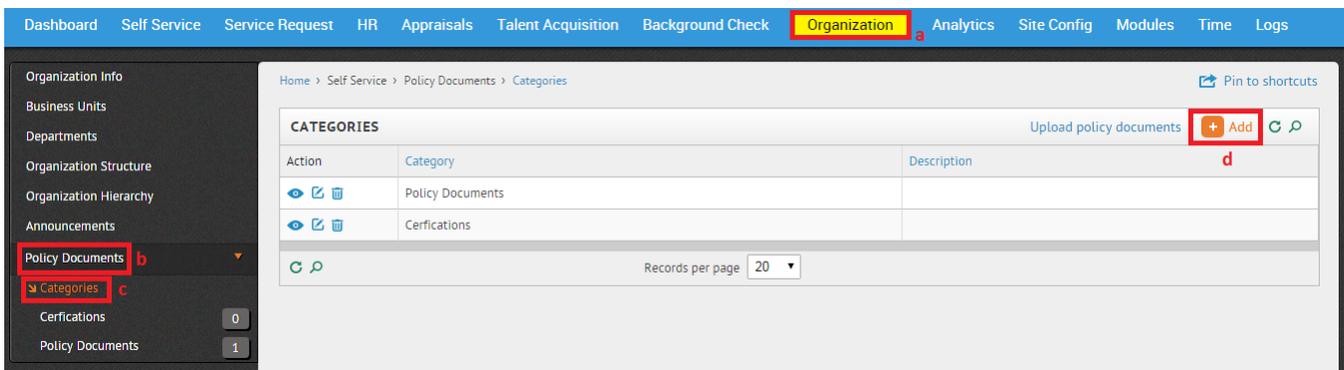
Prefix	First Name	Last Name	Role Type	Email	Business Unit	Department	Reporting manager	employee ID	Job Title	Position	Employment Status	Date of joining	Date of leaving	Experience	Extension	Work telephone number	Fax	Salary	Currency	Pay Frequency	Salary	
Mr	John	Henry	Manager	john.henry@example.com	OB	IT	EM02		MGR	Manager	PER	20-12-2012										
Mrs	Torie	Wilson	Employee	torie.wilson@example.com	GA	ACC	EM03		SE	Trainee	PROB	20-12-2013										

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

- Select the option Organization in the top menu
- Select the option Policy Documents in the submenu on the left side panel
- Click on Categories
- Click on Add



The screenshot shows the Sentrifugo web application interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Talent Acquisition', 'Background Check', 'Organization', 'Analytics', 'Site Config', 'Modules', 'Time', and 'Logs'. The 'Organization' menu item is highlighted with a red box and labeled 'a'. On the left sidebar, the 'Policy Documents' menu item is highlighted with a red box and labeled 'b', and its submenu item 'Categories' is also highlighted with a red box and labeled 'c'. The main content area shows the 'Categories' page for 'Policy Documents'. It features a table with columns for 'Action', 'Category', and 'Description'. The table contains two rows: 'Policy Documents' and 'Certifications'. An 'Add' button with a red box and label 'd' is visible next to the 'Upload policy documents' link. The 'Records per page' dropdown is set to 20.

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

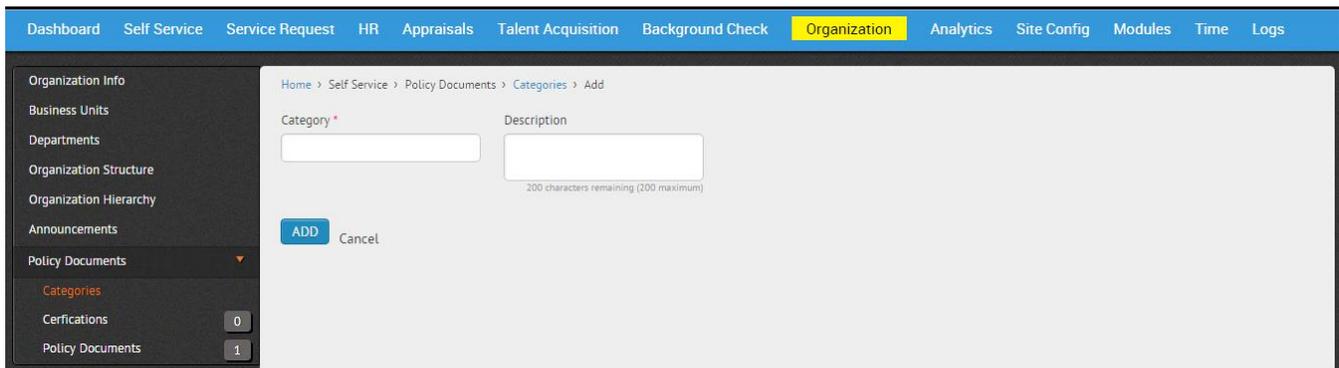


Figure 25.1

## Upload Policy Documents

- e. Click on the link 'Upload policy documents'

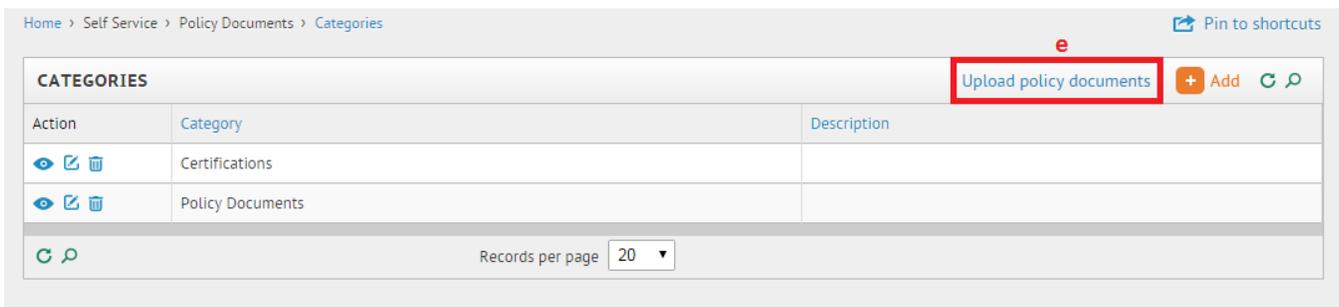


Figure 25.2

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.

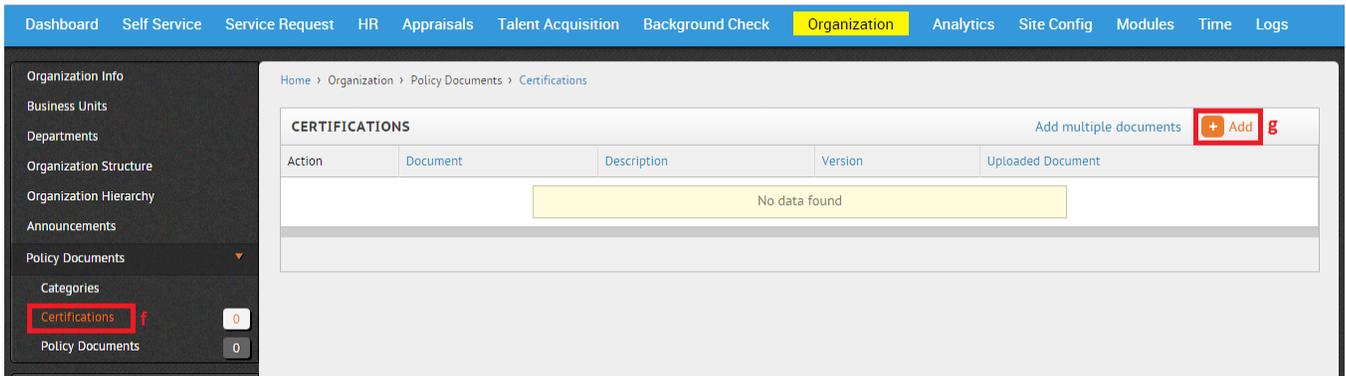


Figure 25.3

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

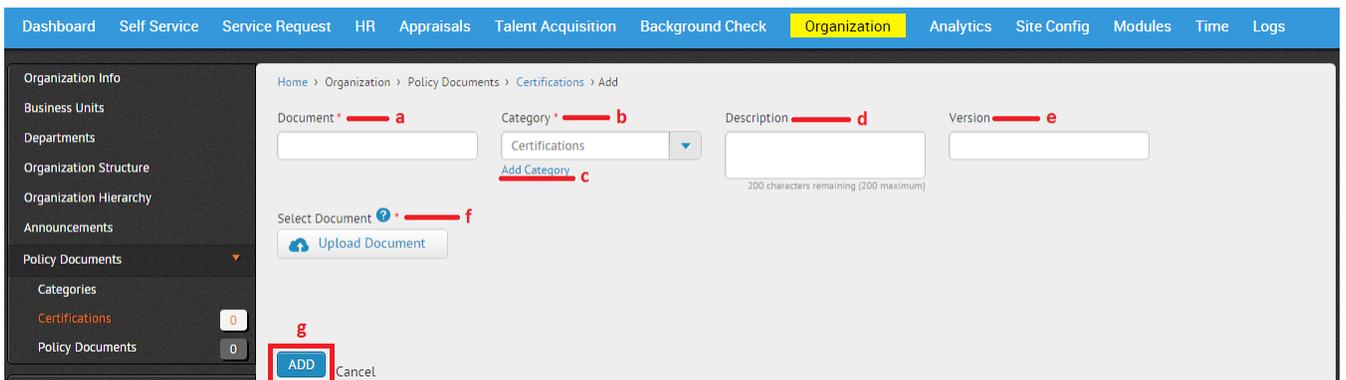


Figure 25.4

## 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

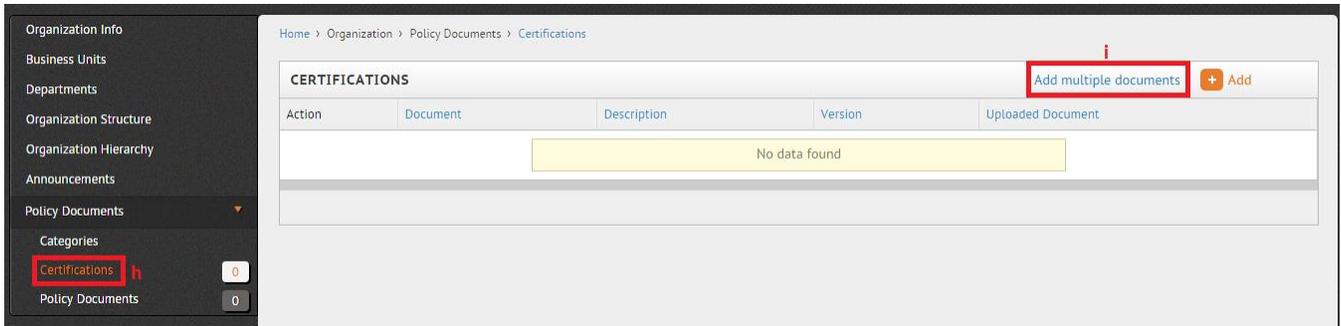


Figure 25.5

- 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)

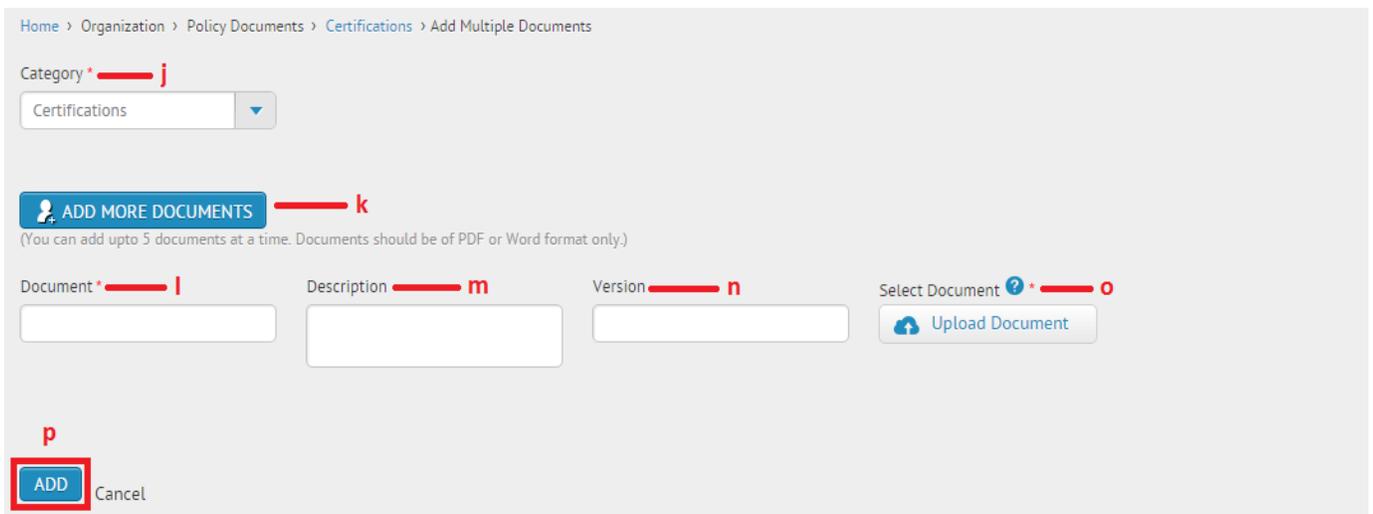


Figure 25.6

## 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

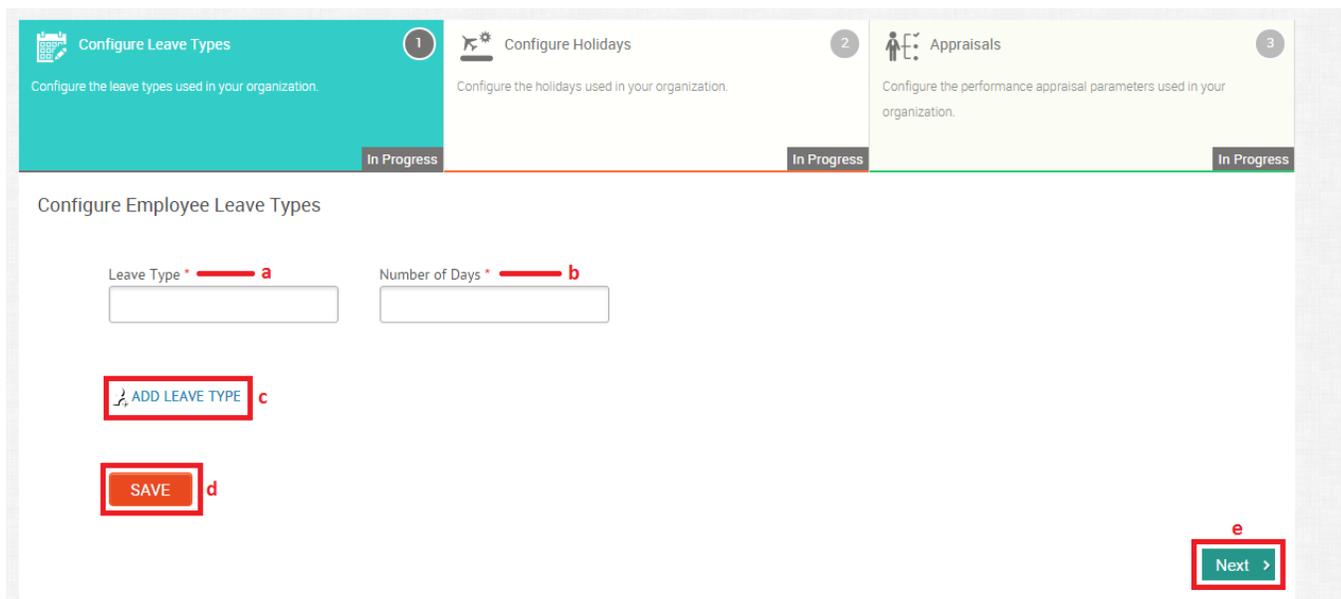


Figure 26

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

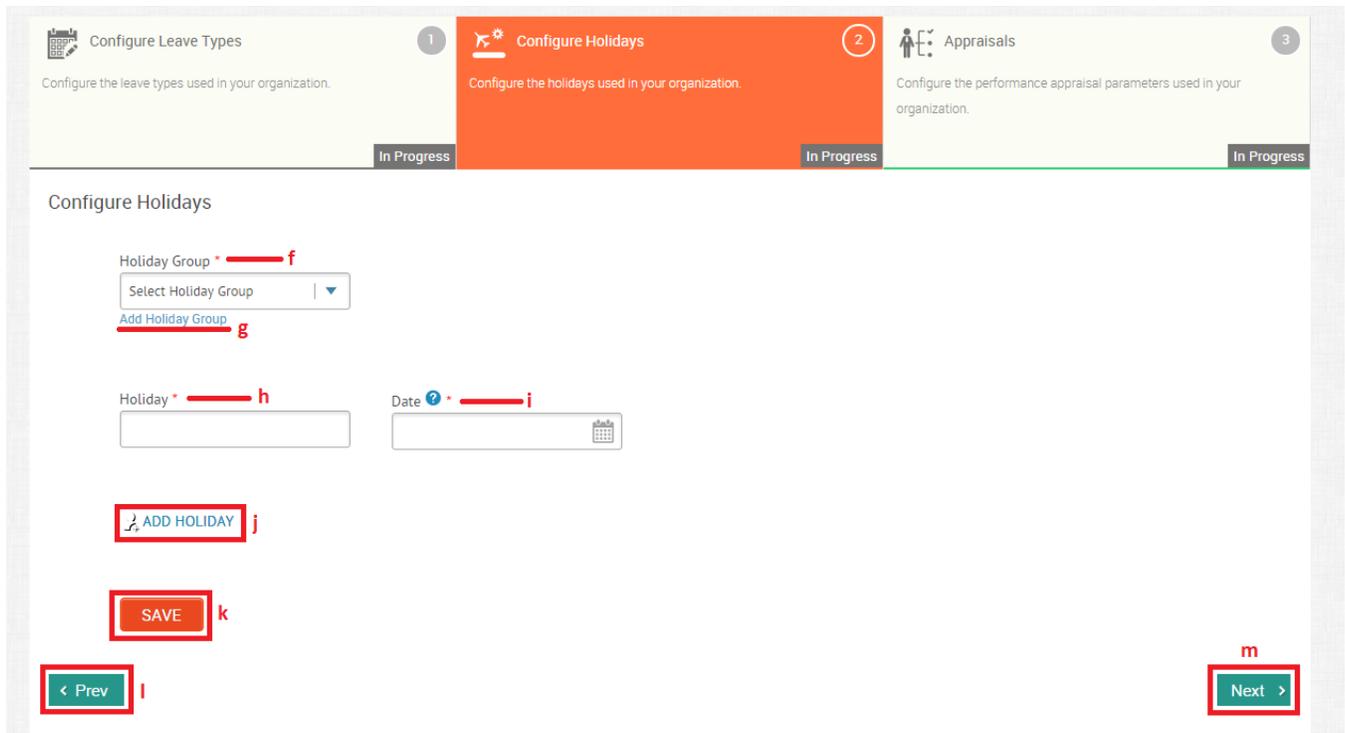


Figure 26.1

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

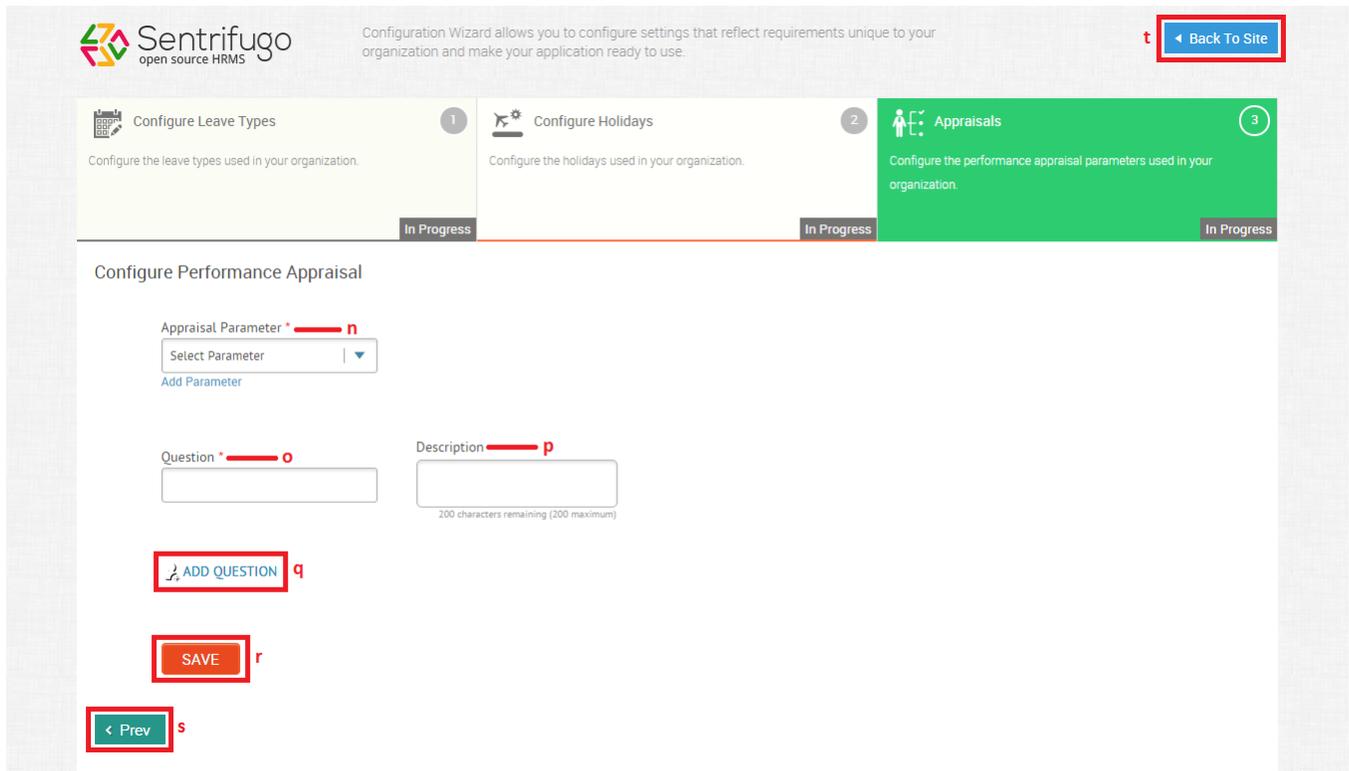


Figure 26.2

## 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.