

Sentrifugo

User Guide

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Getting Started

What is Configuration Wizard

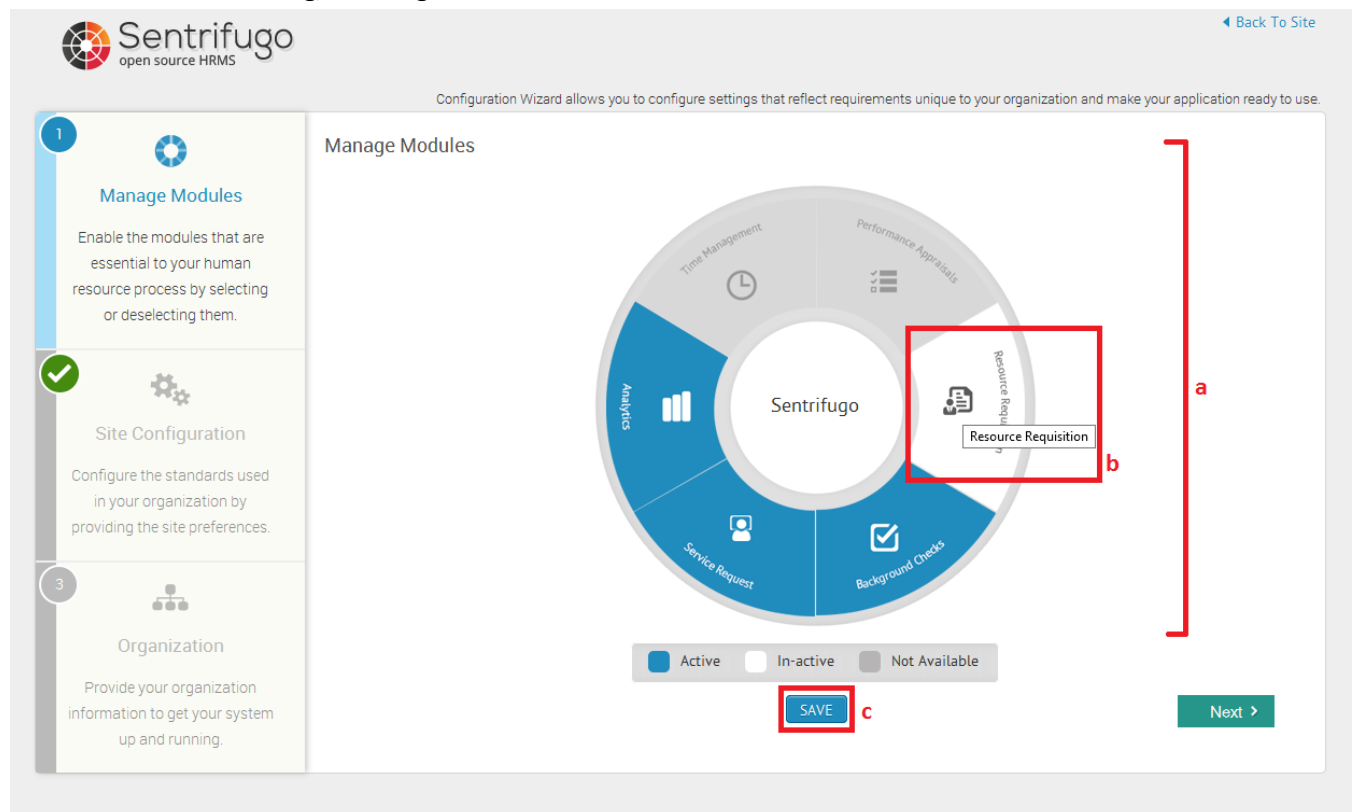
Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use. Wizard is the first screen that is displayed if you have logged into the application for the very first time. Wizard enables you to enter the essential information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

How do I go about the Configuration Wizard

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

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

For further understanding, refer Figure 1

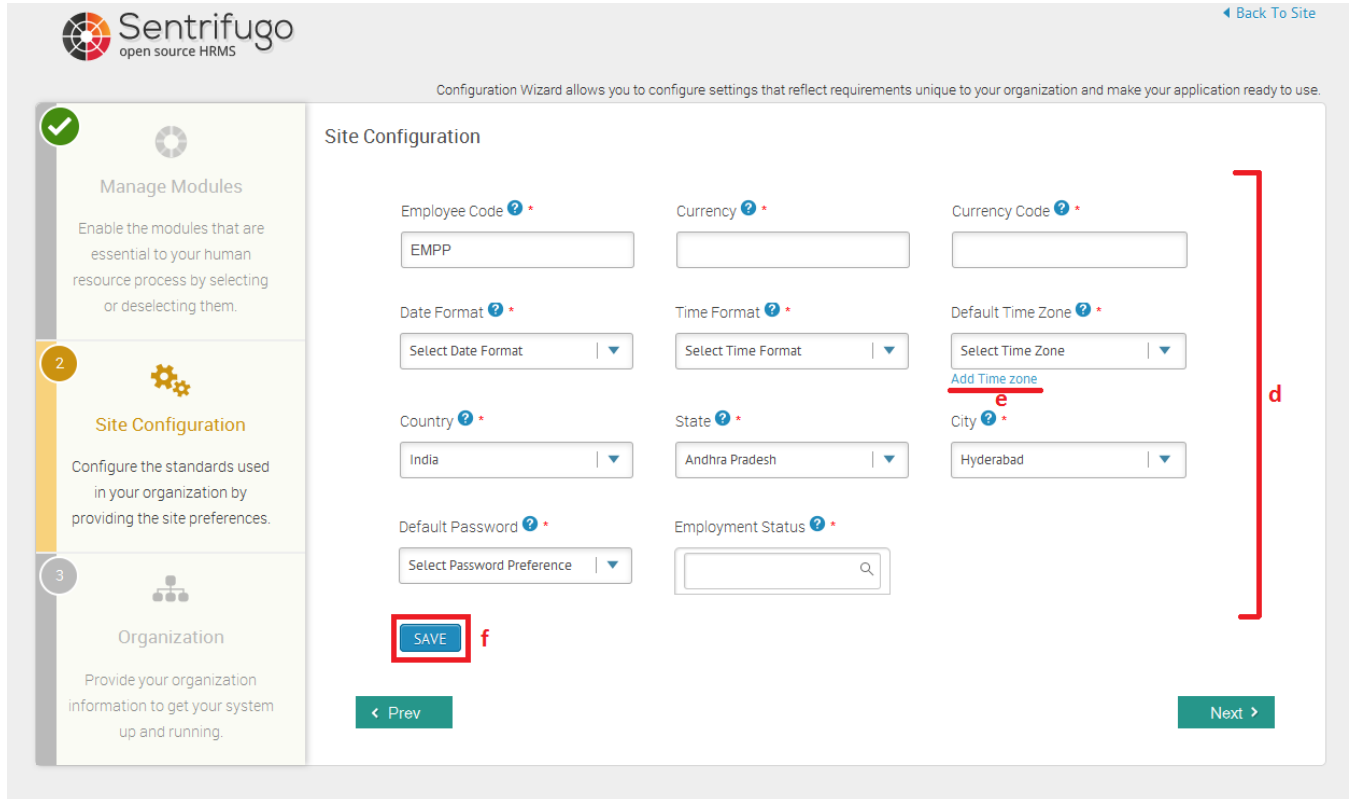


Refer Figure 1

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

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

For further understanding, refer Figure 2



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

Site Configuration

Employee Code [?] *

Currency [?] *

Currency Code [?] *

Date Format [?] *

Time Format [?] *

Default Time Zone [?] *

Country [?] *

State [?] *

City [?] *

Default Password [?] *

Employment Status [?] *

[Add Time zone](#) ^e

SAVE ^f

[Back To Site](#)

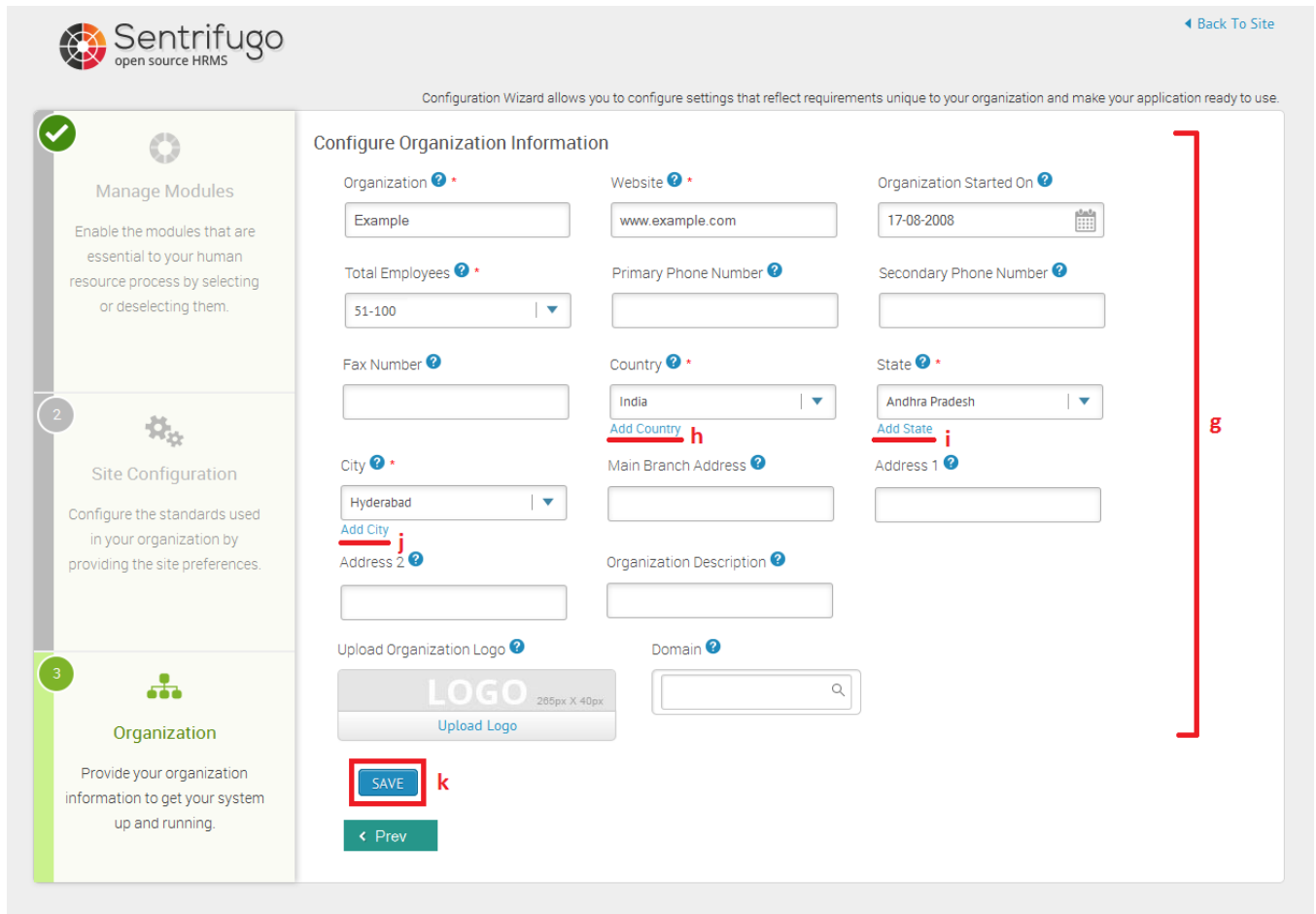
[Prev](#) [Next](#)

Refer Figure 2

In the Organization section, provide organization information

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

For further understanding, refer Figure 3



Sentrifugo
open source HRMS

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

Configure Organization Information

Organization [?] *

Website [?] *

Organization Started On [?]

Total Employees [?] *

Primary Phone Number [?]

Secondary Phone Number [?]

Fax Number [?]

Country [?] * [Add Country](#) ^h

State [?] * [Add State](#) ⁱ

City [?] * [Add City](#) ^j

Main Branch Address [?]

Address 1 [?]

Address 2 [?]

Organization Description [?]

Upload Organization Logo [?] 285px X 40px [Upload Logo](#)

Domain [?]

SAVE ^k

[< Prev](#)

Figure 3

What Can be done with Sentrifugo's Dashboard:

Dashboard is a new feature in Sentrifugo enabling you to have all the information you need at a glance. You can decide what elements you need on the dashboard by configuring widgets. Not only that, you can view your colleague's daily and upcoming birthdays updates and announcements for a department or for an entire business unit from your management.

- 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

For further understanding, refer figure 4

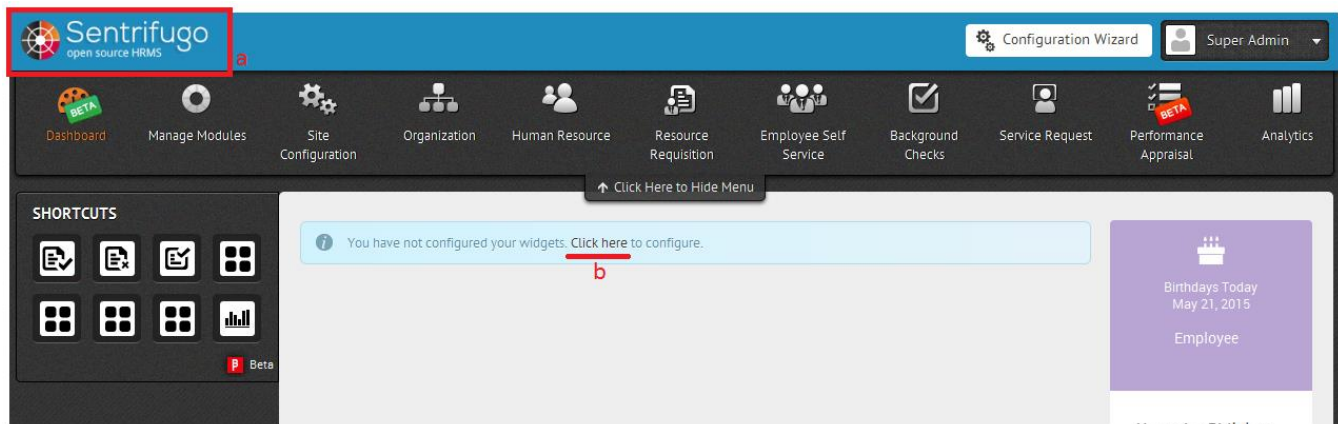


Figure 4

Or

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

Or

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

Refer Figure 5

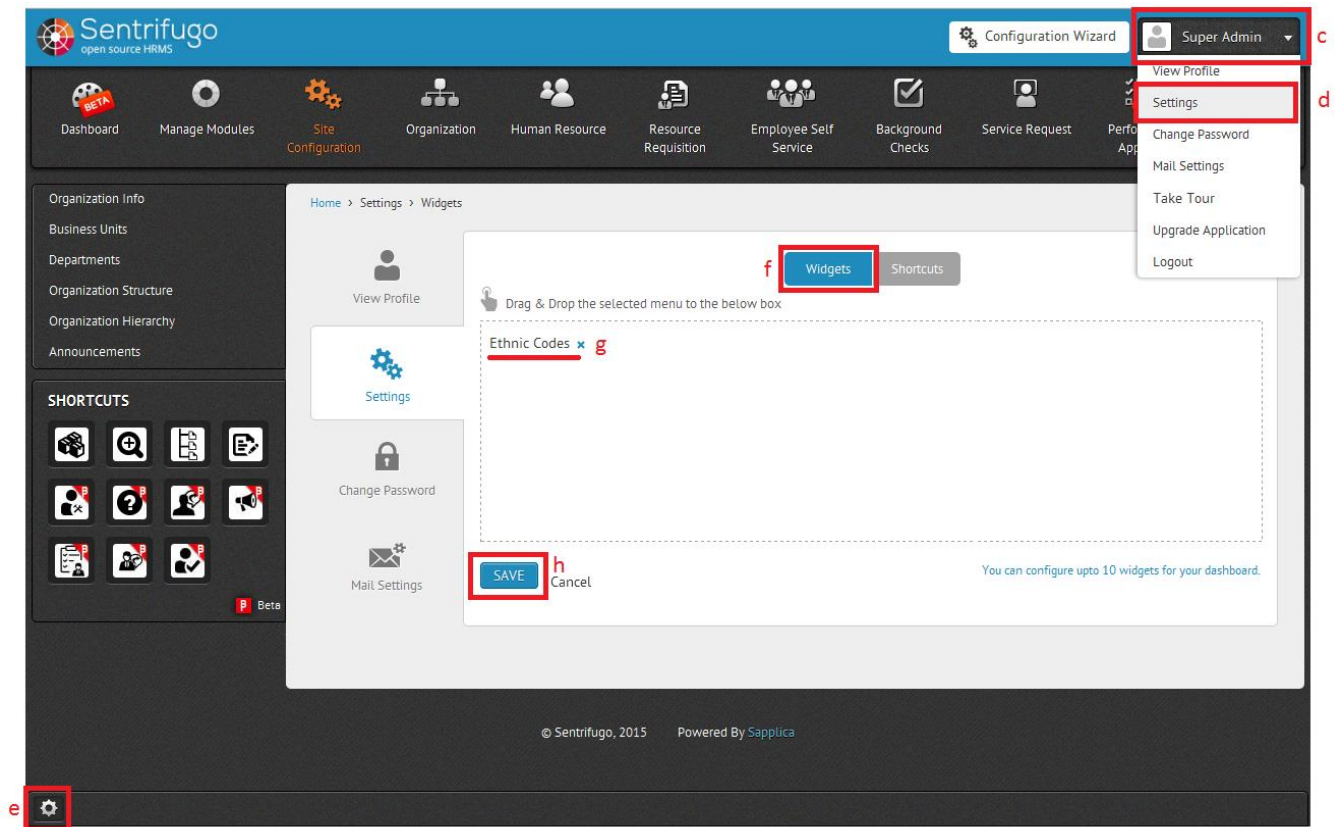


Figure 5

For announcements:

- Click on organization in the top menu
- Click on Announcements
- Click on Add
- Select the business unit(s), department and title
- Enter the description and upload attachments if any
- Click on Post to post the announcements

Refer figure 6

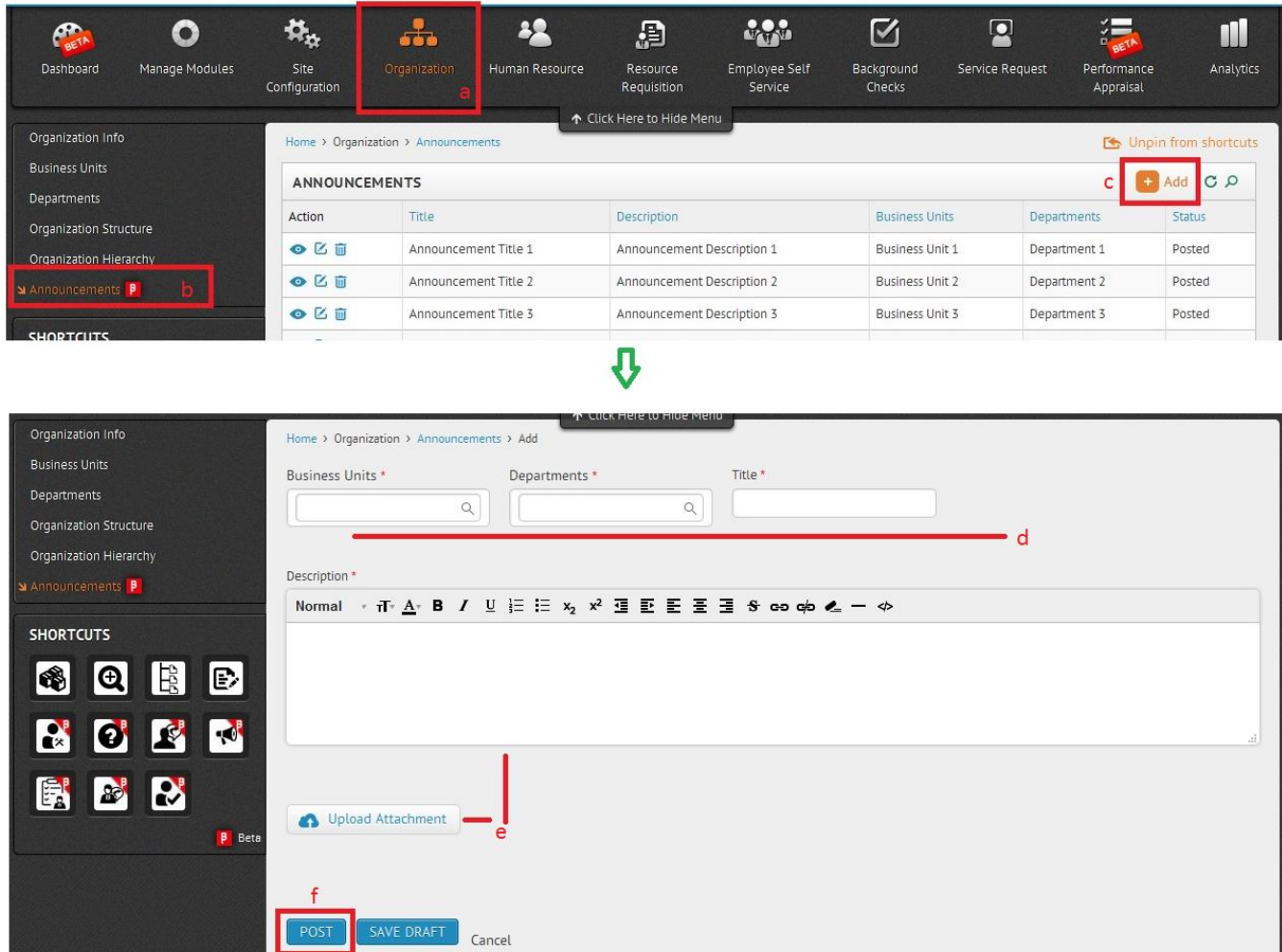


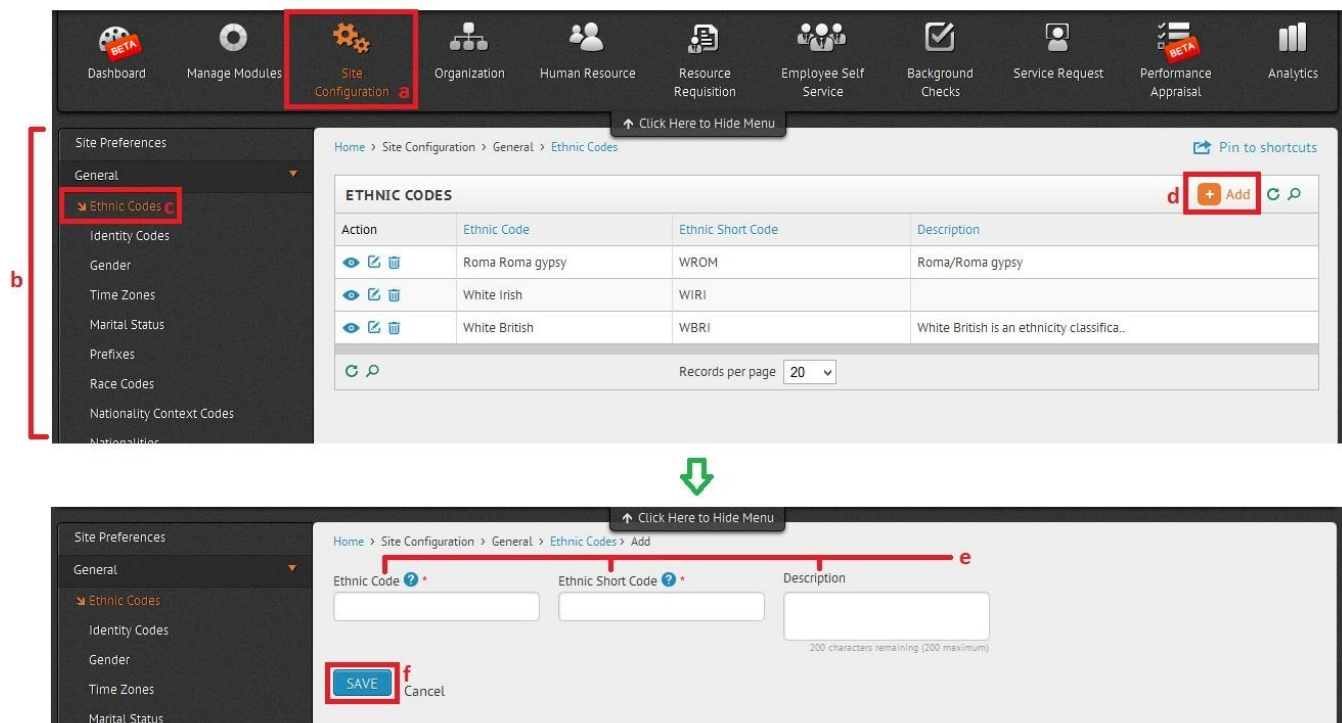
Figure 6 illustrates the process to add an announcement in the Sentrifugo HRMS interface. The top navigation bar shows the 'Organization' menu item highlighted (a). The left sidebar shows the 'Announcements' menu item highlighted (b). The main content area displays a table of announcements and an 'Add' button (c). A green arrow points down to the 'Add' form. The form includes fields for 'Business Units', 'Departments', and 'Title' (d), a 'Description' text area, an 'Upload Attachment' button (e), and 'POST', 'SAVE DRAFT', and 'Cancel' buttons (f).

Figure 6

How to Set Site Configurations within the Application:










- Click on Site Configurations 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 details

For further understanding, refer Figure 7, which explains about adding Ethnic Codes



The figure consists of two screenshots of the Sentrifugo application interface, illustrating the steps to add Ethnic Codes.

Top Screenshot: Shows the 'Site Configuration' menu in the top navigation bar (labeled 'a'). The left sidebar shows the 'Ethnic Codes' submenu (labeled 'b'). The main content area displays the 'ETHNIC CODES' table with columns: Action, Ethnic Code, Ethnic Short Code, and Description. The 'Add' button (labeled 'd') is visible in the top right corner of the table.

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

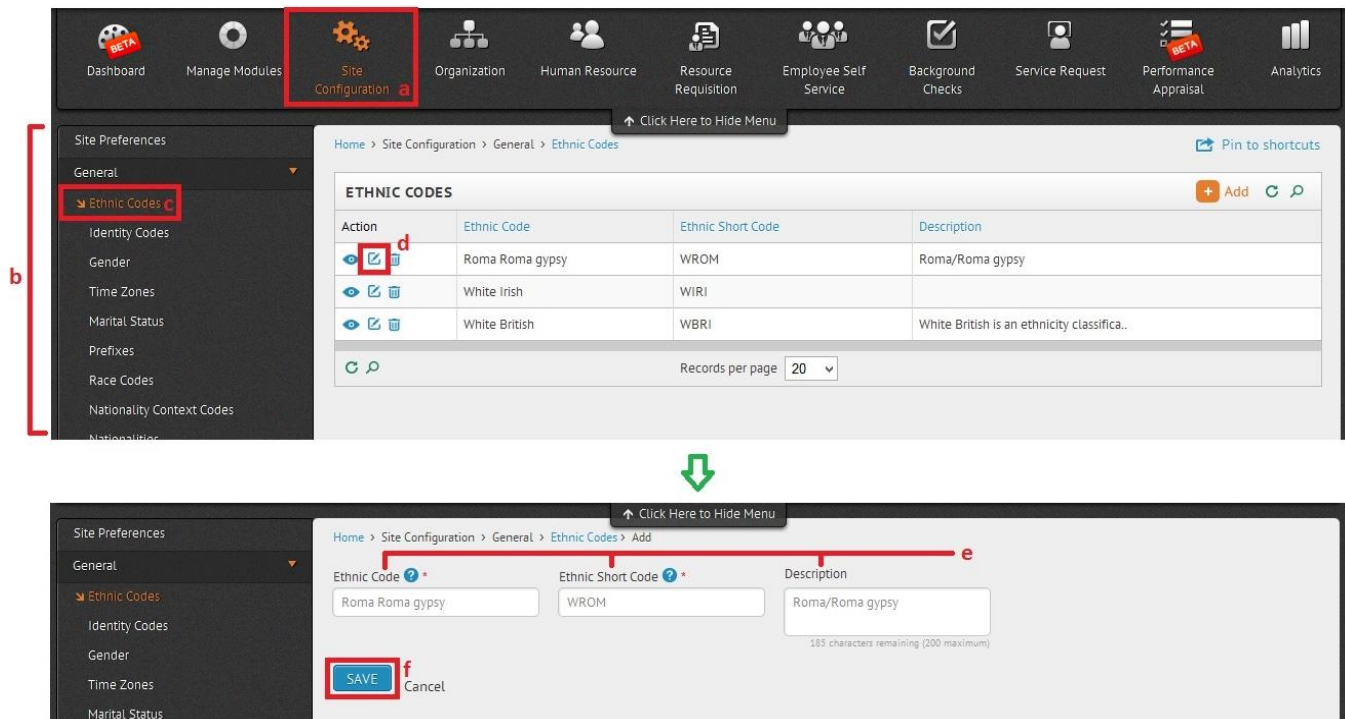
Bottom Screenshot: Shows the 'Add' form for Ethnic Codes. The form has three input fields: 'Ethnic Code' (labeled 'e'), 'Ethnic Short Code', and 'Description'. The 'SAVE' button (labeled 'f') is visible at the bottom left.

Figure 7

How to Edit Site Configurations within the Application:




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

For further understanding, refer Figure 8, which explains about editing Ethnic Codes



The figure consists of two screenshots from the Sentrifugo application interface, illustrating the steps to edit Ethnic Codes.

Top Screenshot: The 'Site Configuration' menu item is highlighted in the top navigation bar (a). The left sidebar shows the 'Ethnic Codes' submenu selected (b). The main content area displays a table of Ethnic Codes. The 'Edit' icon (a pencil) for the first record, 'Roma Roma gypsy', is highlighted (d).

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

Bottom Screenshot: The 'Add' form for an Ethnic Code is shown. The fields are labeled 'Ethnic Code' (e), 'Ethnic Short Code' (e), and 'Description' (e). The 'SAVE' button is highlighted (f).

Records per page: 20

Figure 8

Need to Delete Site Configurations within the Application:

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

For further understanding, refer Figure 9, which explains about deleting Ethnic Codes

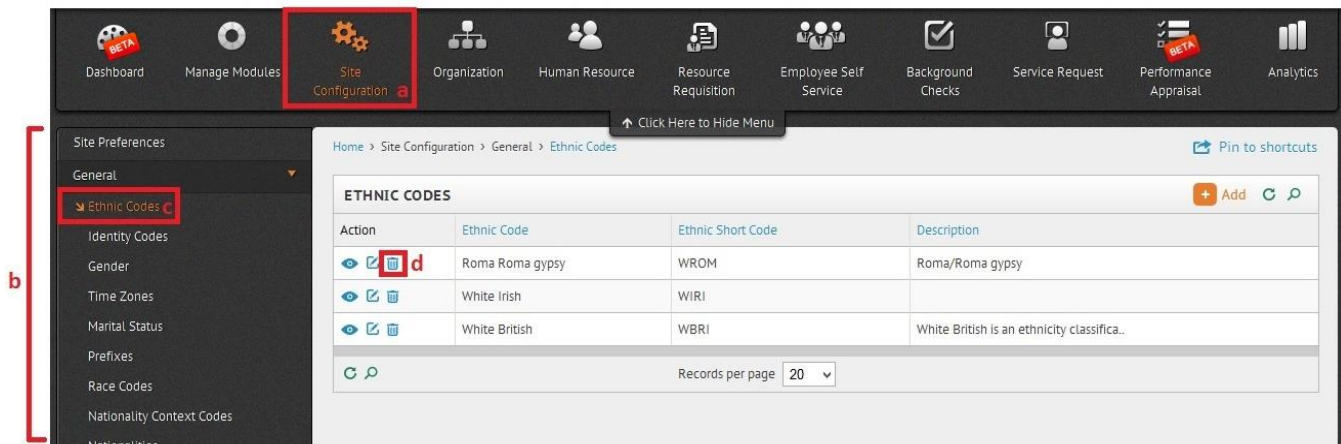


Figure 9

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

Refer Figure 10

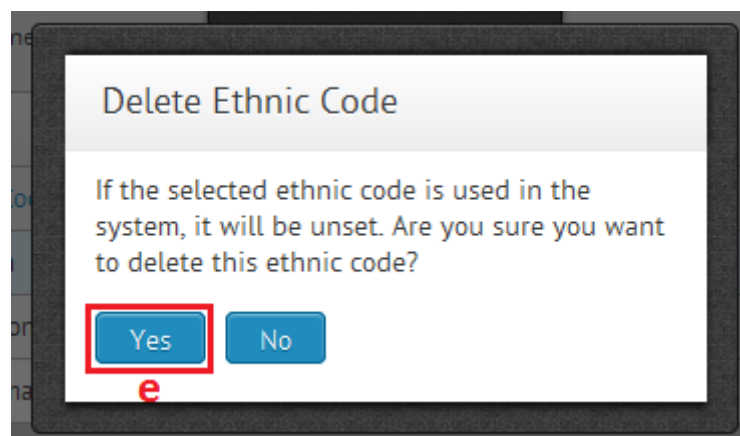


Figure 10

To 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

For further understanding, refer Figure 11, which explains about adding Pay Frequency

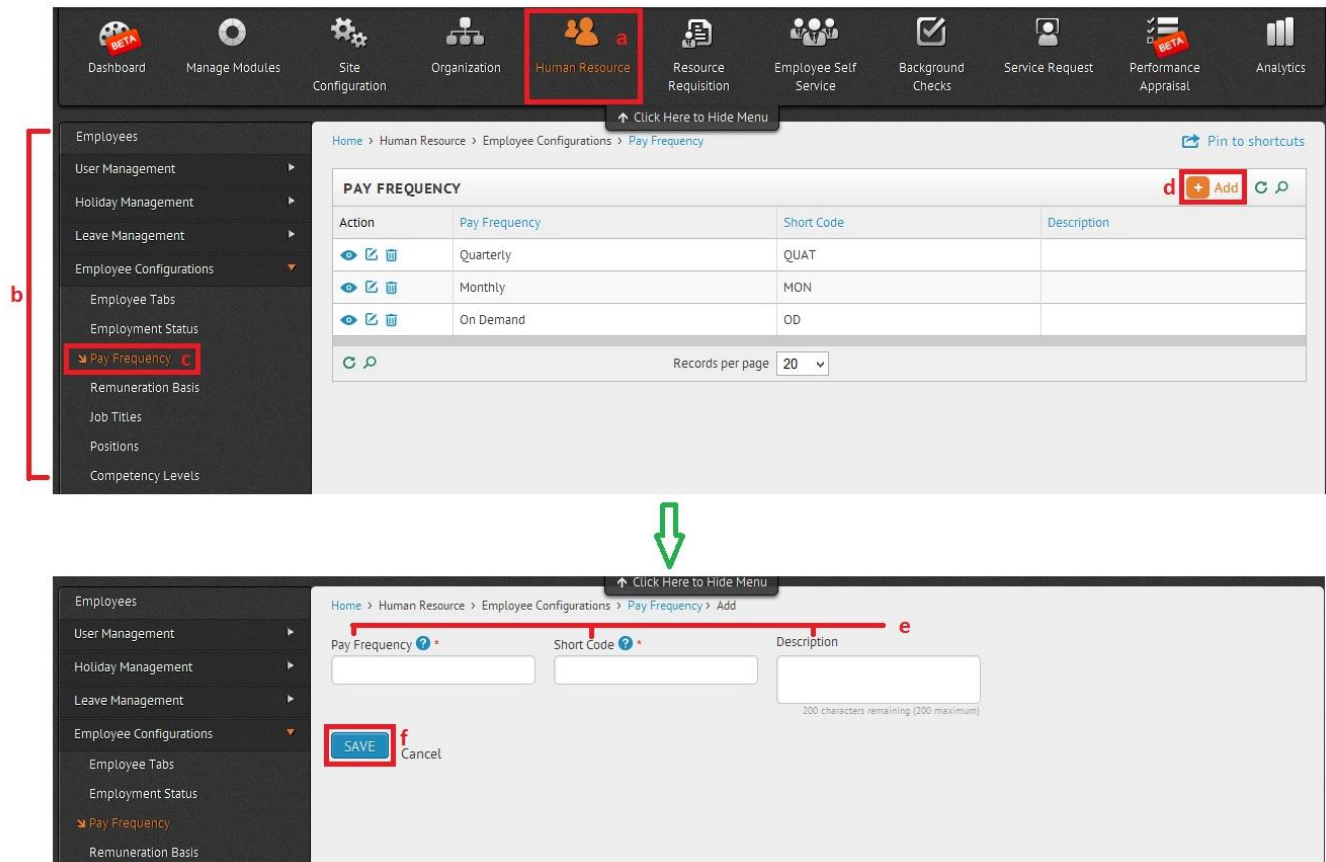
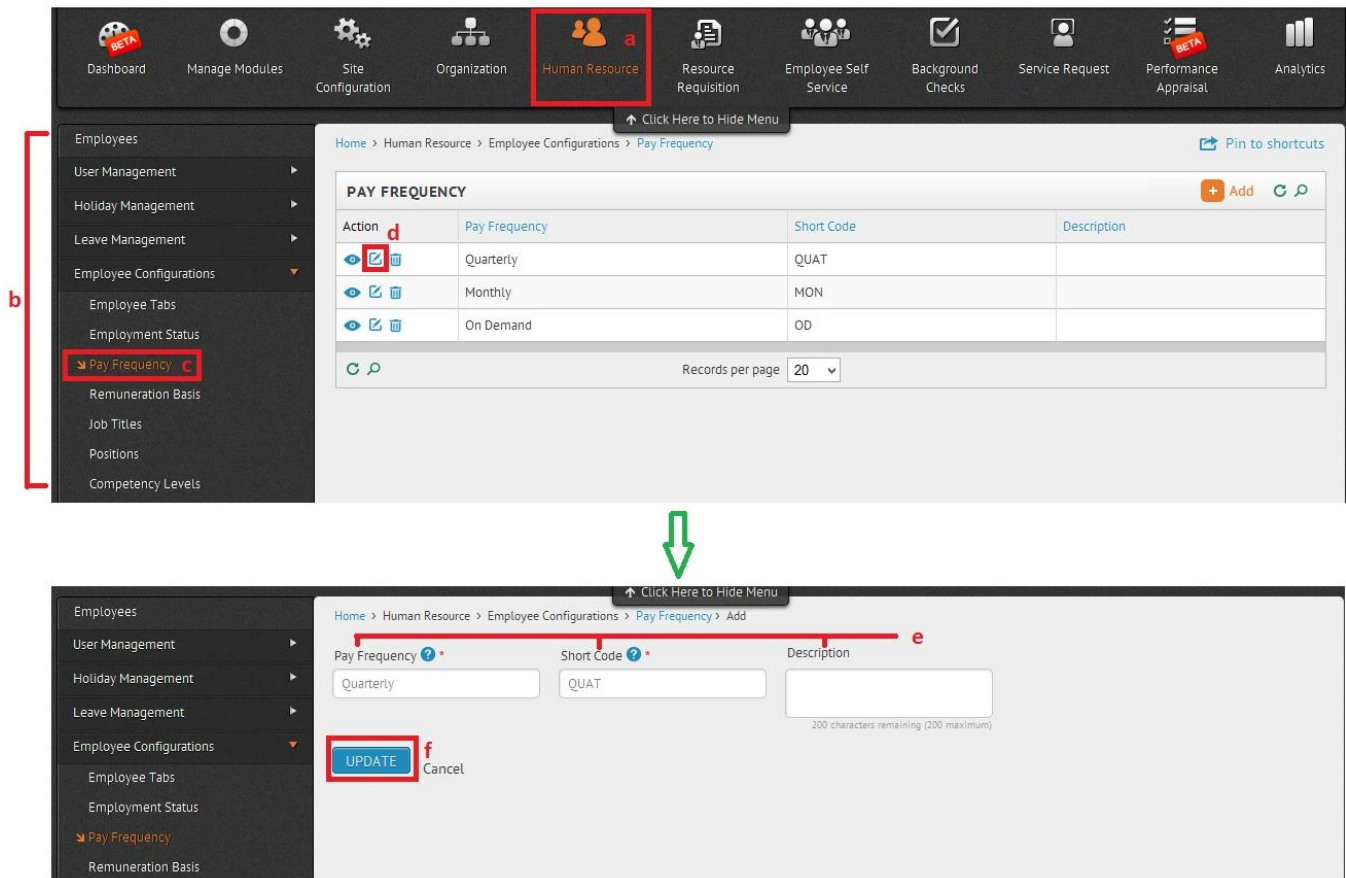


Figure 11

To Edit an Employee Configuration:

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

For further understanding, refer Figure 12, which explains about editing Pay Frequency



The figure consists of two screenshots of the Sentrifugo HRMS interface, illustrating the steps to edit Pay Frequency.

Top Screenshot: The 'Human Resource' menu item is highlighted with a red box and labeled 'a'. The left sidebar menu is expanded, and the 'Pay Frequency' item is highlighted with a red box and labeled 'b'. The main content area shows the 'PAY FREQUENCY' table with columns: Action, Pay Frequency, Short Code, and Description. The 'Quarterly' record is selected, and the 'Edit' icon (a pencil) is highlighted with a red box and labeled 'd'. The 'Add' button is also visible.

Bottom Screenshot: The 'Pay Frequency' form is shown. The 'Pay Frequency' field is set to 'Quarterly', the 'Short Code' is 'QUAT', and the 'Description' field is empty. The 'UPDATE' button is highlighted with a red box and labeled 'f'. A red line connects the 'UPDATE' button to the 'Pay Frequency' field, labeled 'e'. A green arrow points from the top screenshot to the bottom one.

Figure 12

To Delete an Employee Configuration:

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

For further understanding, refer Figure 13, which explains about deleting Pay Frequency

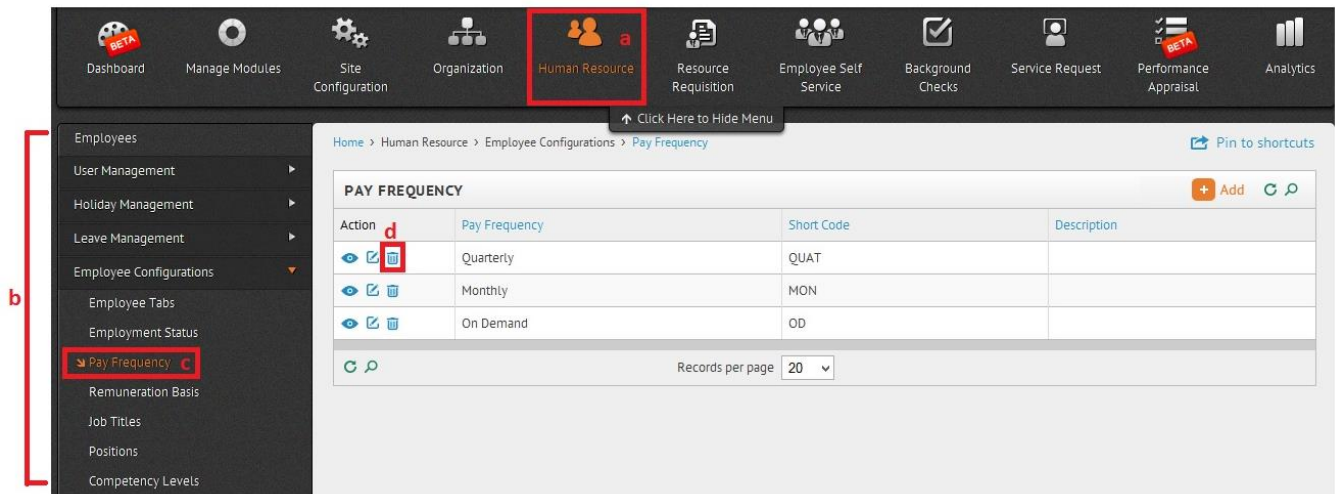


Figure 13

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

Refer Figure 14

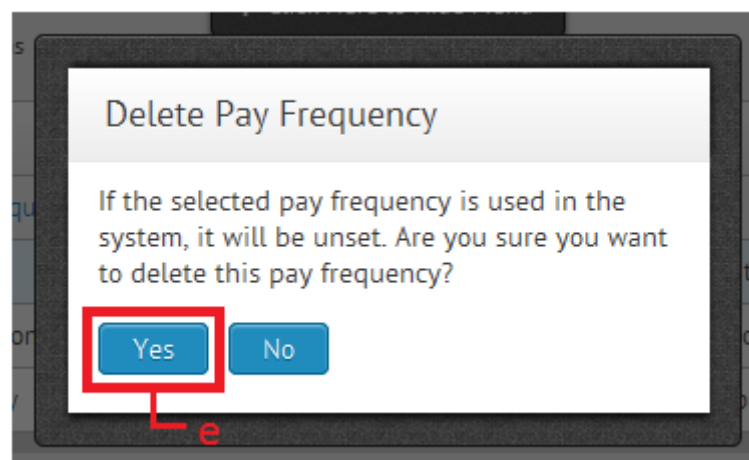


Figure 14

Want to Configure Tabs for Employees:

- Click on Human Resource 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

Refer Figure 15

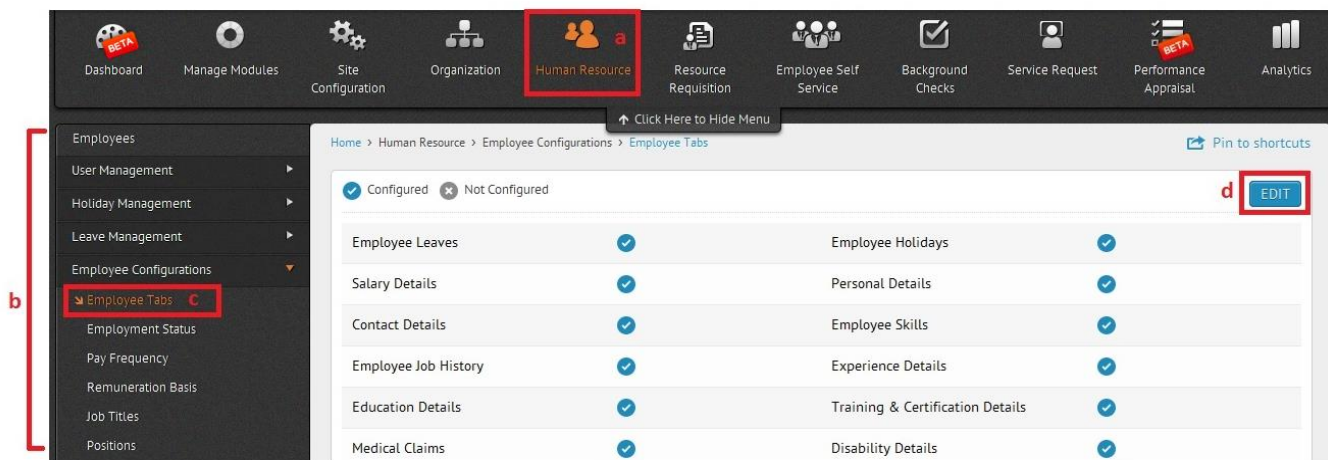


Figure 15

- 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

Refer Figure 16

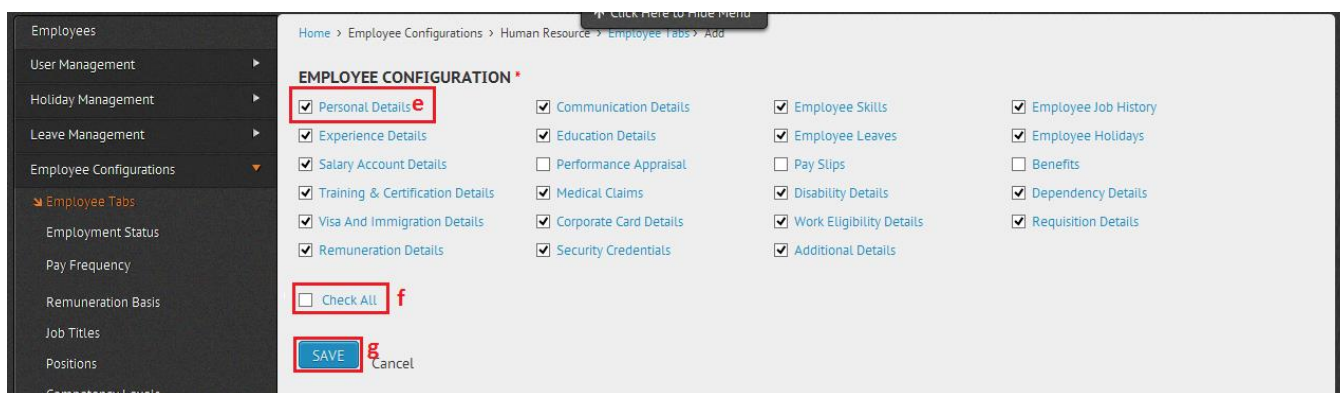


Figure 16

Do You Want to 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

Refer Figure 17

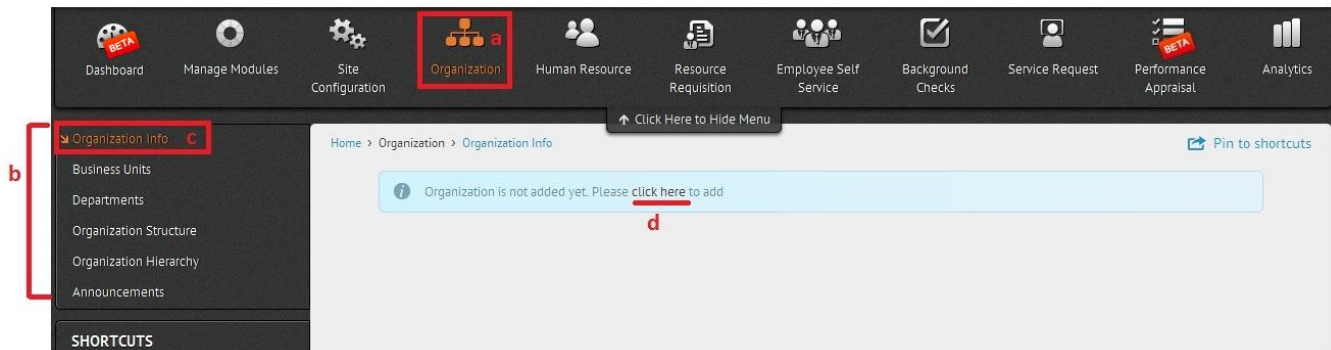
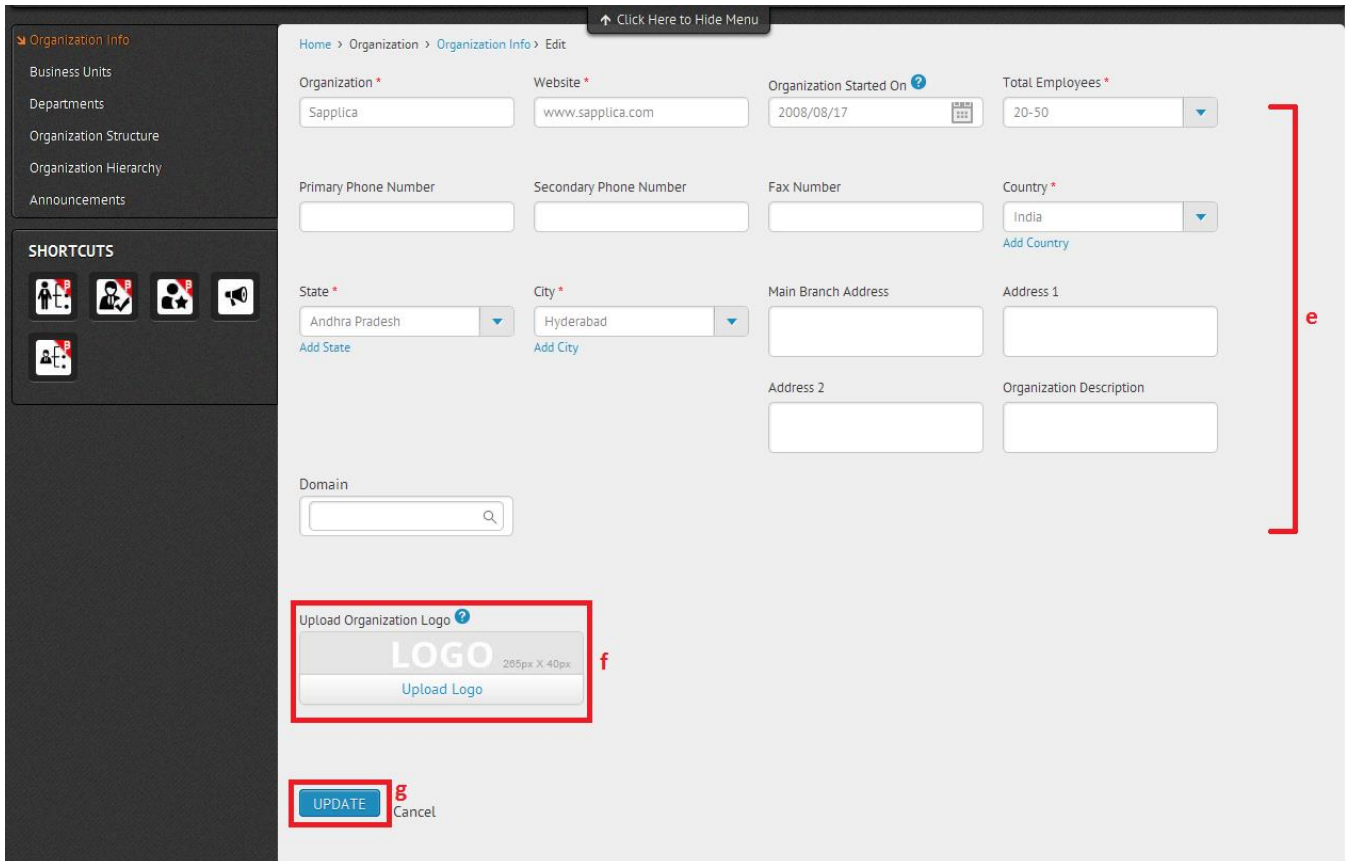


Figure 17

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

Refer Figure 18



Organization Info

Business Units

Departments

Organization Structure

Organization Hierarchy

Announcements

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Home > Organization > Organization Info > Edit

Organization * Sapplika Website * www.sapplika.com Organization Started On 2008/08/17 Total Employees * 20-50

Primary Phone Number Secondary Phone Number Fax Number Country * India Add Country

State * Andhra Pradesh Add State City * Hyderabad Add City Main Branch Address Address 1

Address 2 Organization Description

Domain

Upload Organization Logo ?

LOGO 285px X 40px

Upload Logo

UPDATE g Cancel

Figure 18

How to Add Business Units:

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

Refer Figure 19

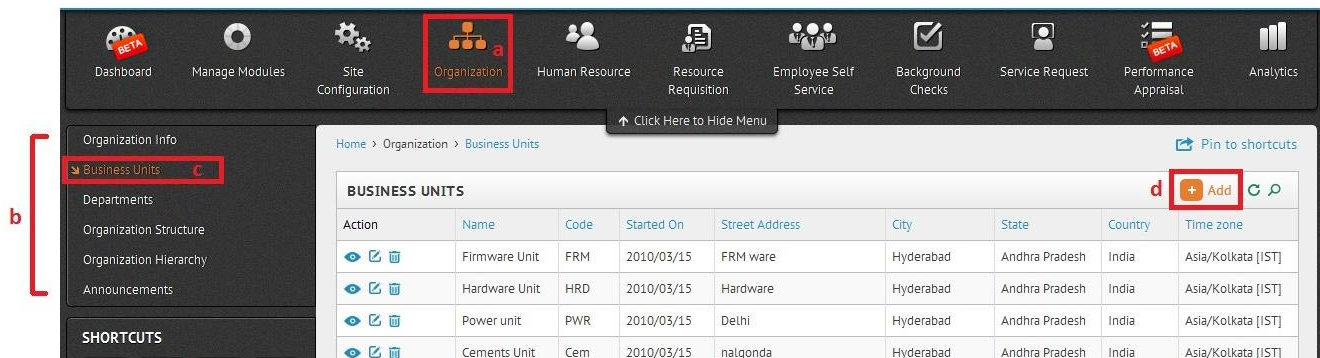
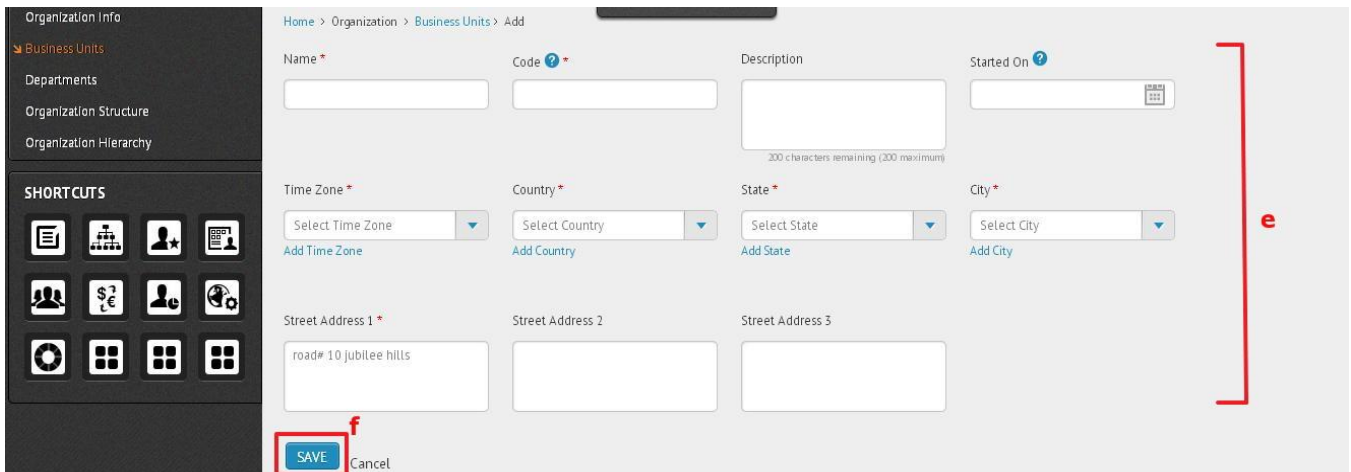


Figure 19

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

Refer Figure 20



The screenshot shows the 'Add Business Unit' form in the Sentrifugo HRMS interface. The left sidebar shows the Organization menu with submenus: Organization Info, Business Units (highlighted with a red box and label 'b'), Departments, Organization Structure, Organization Hierarchy, and Announcements. The main content area displays the 'Add' form with fields for Name, Code, Description, Started On, Time Zone, Country, State, City, Street Address 1, Street Address 2, and Street Address 3. A 'SAVE' button (highlighted with a red box and label 'f') and a 'Cancel' button are at the bottom left. A red bracket on the right side of the form is labeled 'e'.

Figure 20

Steps to 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

Refer Figure 21

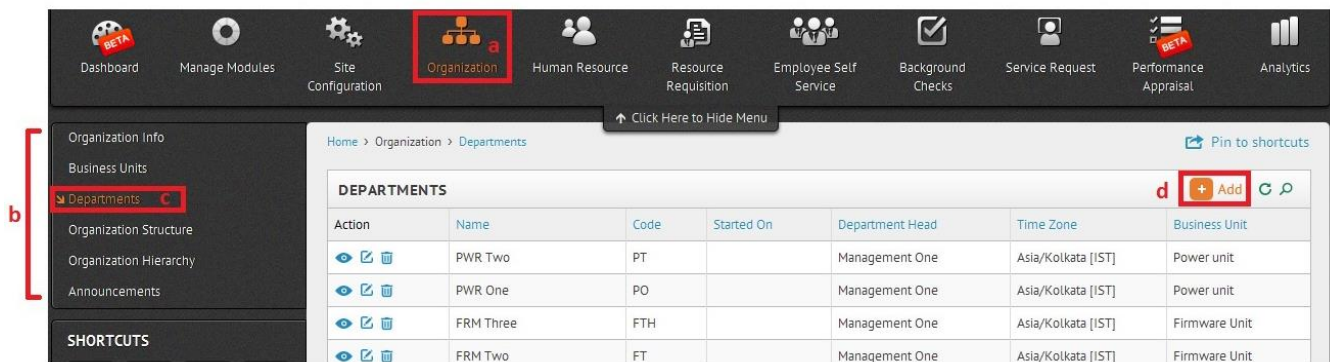
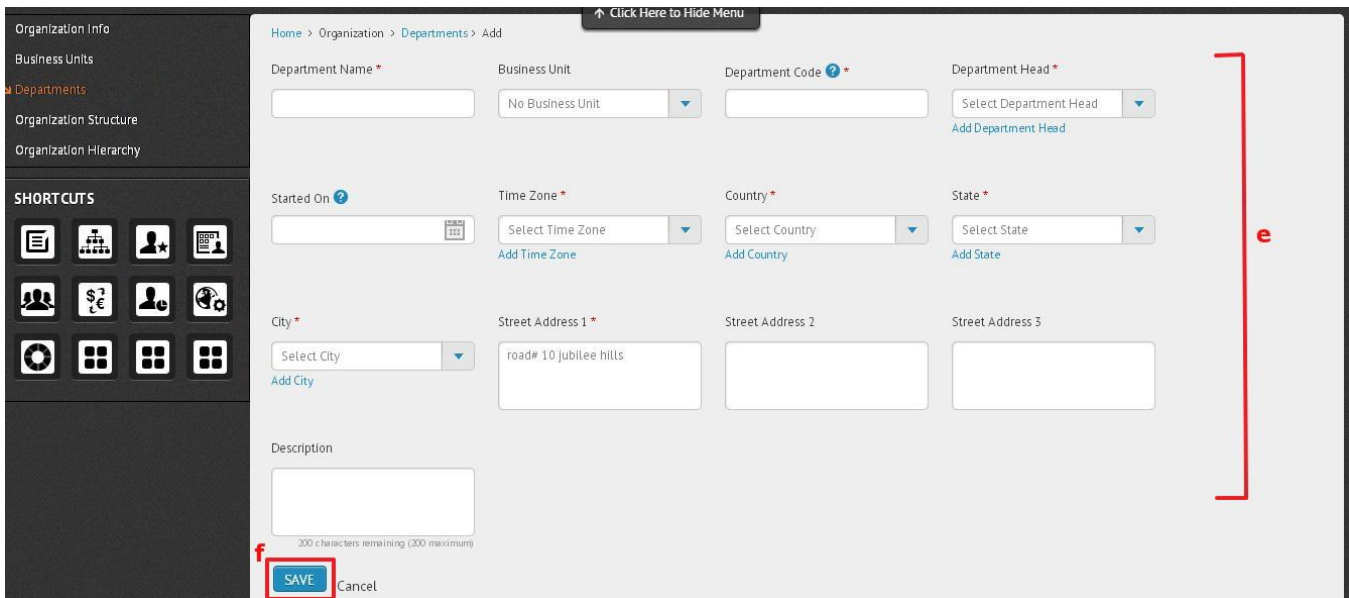


Figure 21

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

Refer Figure 22



The screenshot shows the 'Add Department' form in the Sentrifugo HRMS interface. The form is titled 'Home > Organization > Departments > Add'. It contains several input fields and dropdown menus: Department Name *, Business Unit (No Business Unit), Department Code *, Department Head * (Select Department Head), Started On *, Time Zone * (Select Time Zone), Country * (Select Country), State * (Select State), City * (Select City), Street Address 1 *, Street Address 2, Street Address 3, and Description. A 'SAVE' button (highlighted with a red box and labeled 'f') is located at the bottom left. A red bracket on the right side of the form is labeled 'e'.

Figure 22

How do I Set Site Preferences:

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

Refer Figure 23

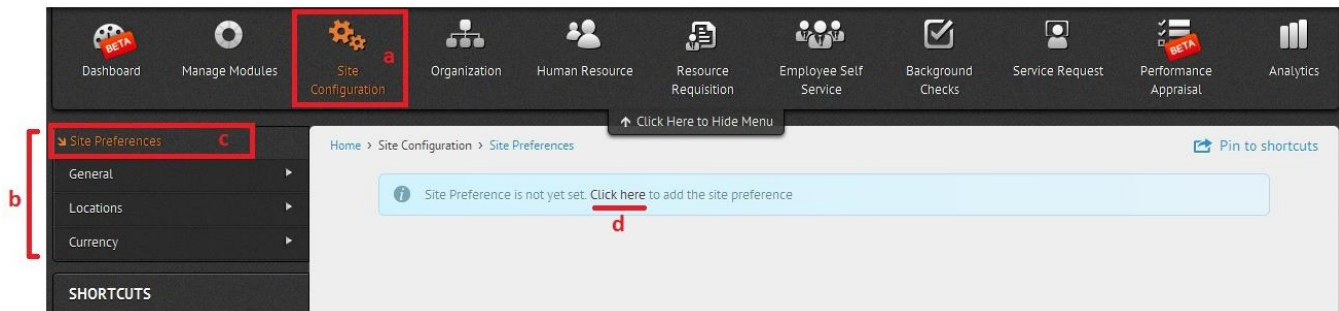


Figure 23

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

Refer Figure 24

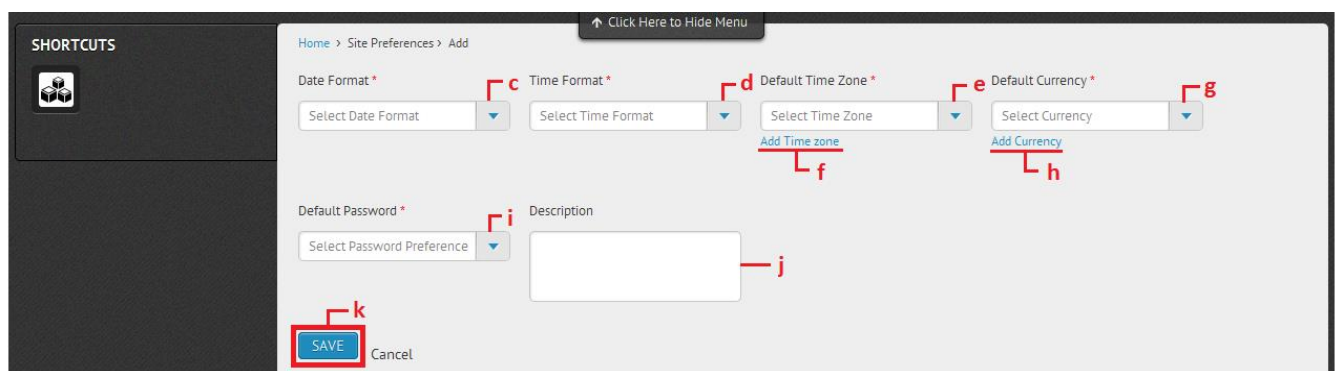


Figure 24

How to Activate and In-activate Modules:

- Click on Manage 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

Refer Figure 25

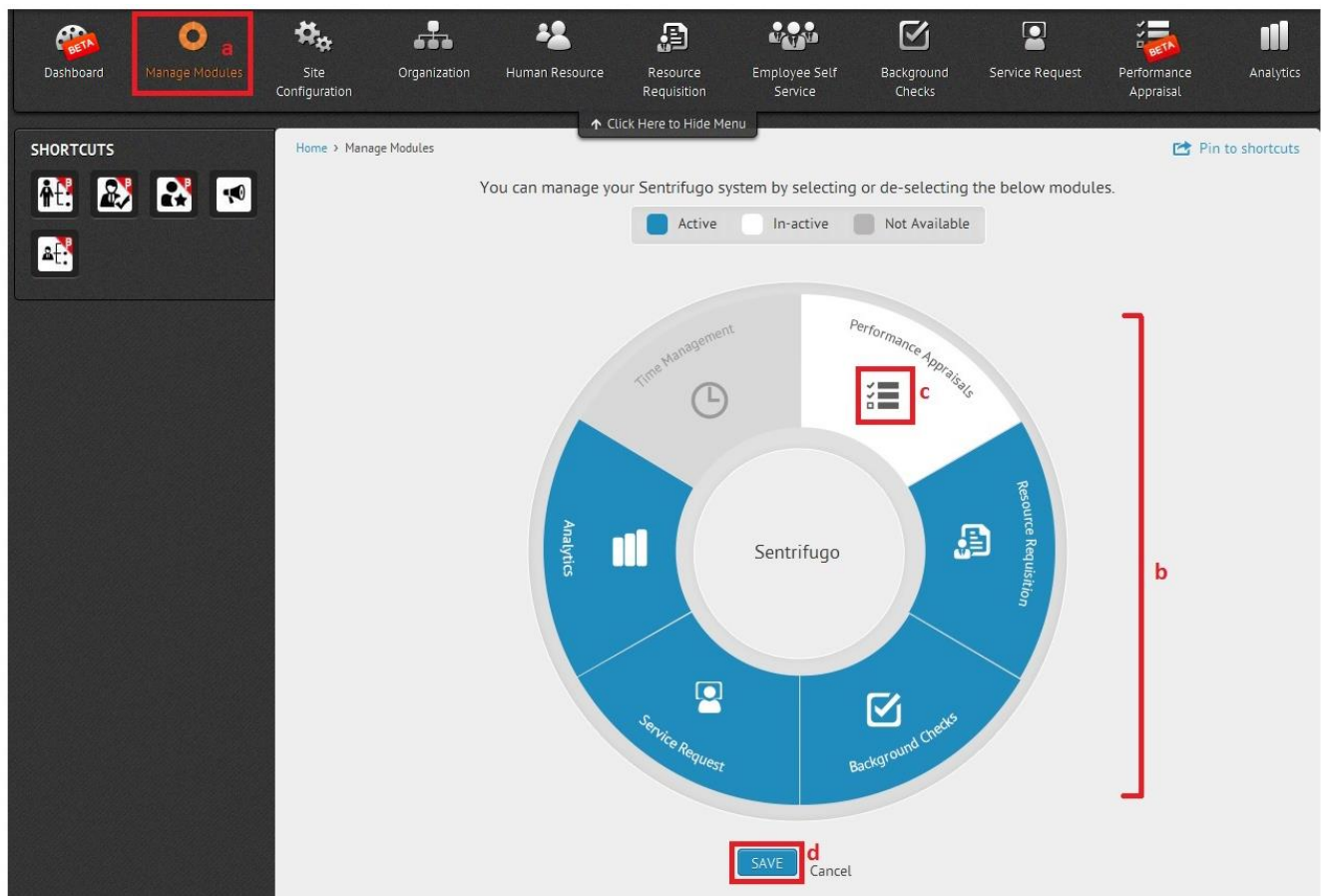


Figure 25

Do you want to Add Roles & Privileges:

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

Refer Figure 26

Home > Human Resource > User Management > Roles & Privileges

ROLES & PRIVILEGES

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

Click Here to Hide Menu

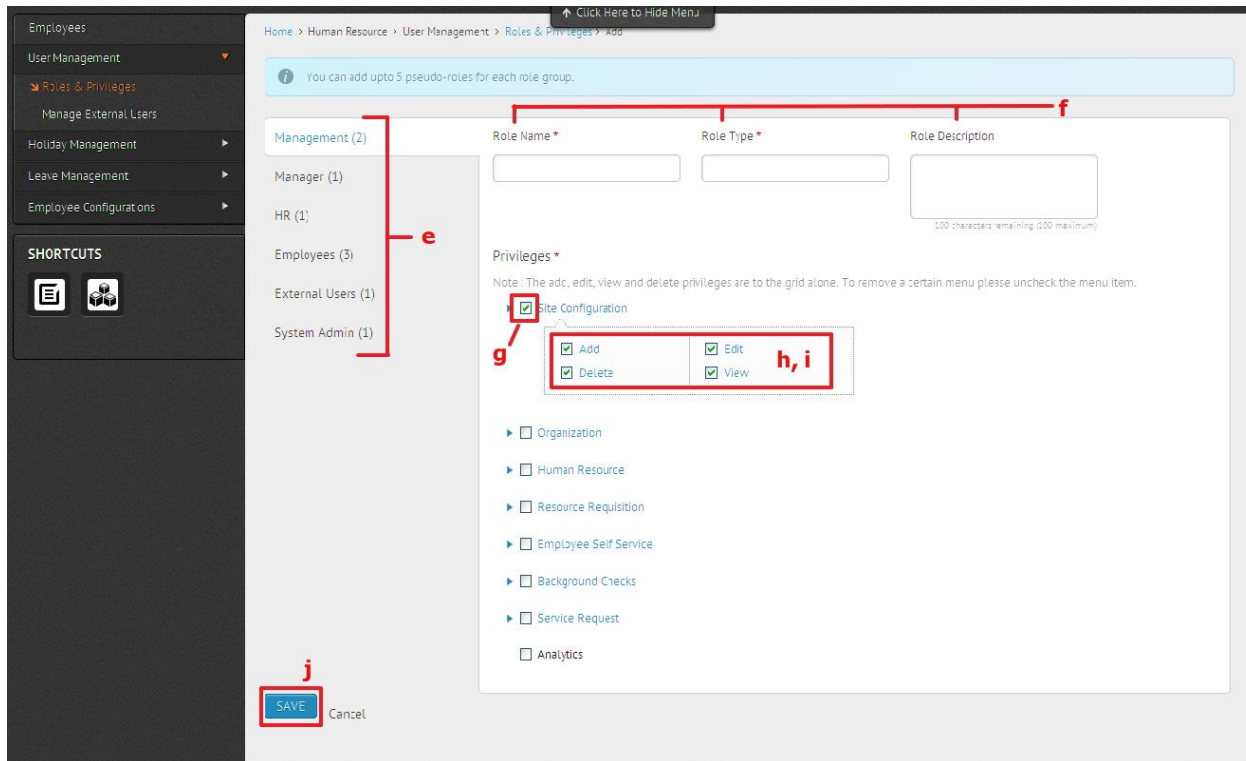
Pin to shortcuts

SHORTCUTS

Figure 26

- 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 27



Home > Human Resource > User Management > Roles & Privileges > Add

You can add upto 5 pseudo-roles for each role group.

Role Name * Role Type * Role Description

100 characters remaining (100 maximum)

Privileges *

Note: The add, edit, view and delete privileges are to the grid alone. To remove a certain menu please uncheck the menu item.

☒ Site Configuration

☒ Add ☒ Edit ☒ View

☒ Delete

☐ Organization

☐ Human Resource

☐ Resource Requisition

☐ Employee Self Service

☐ Background Checks

☐ Service Request

☐ Analytics

SAVE Cancel

Figure 27

How do I Add an External User:

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

Refer Figure 28

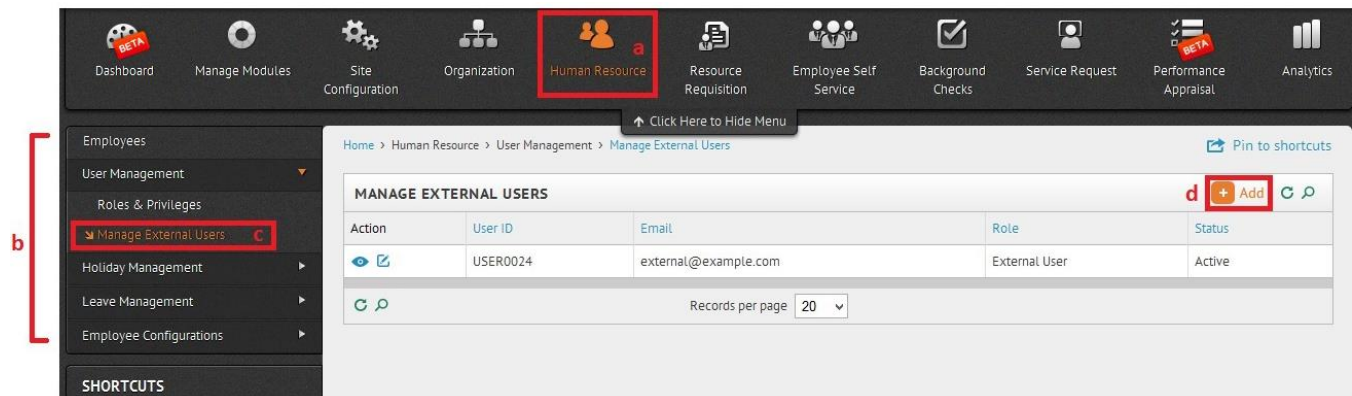


Figure 28

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

Refer Figure 29



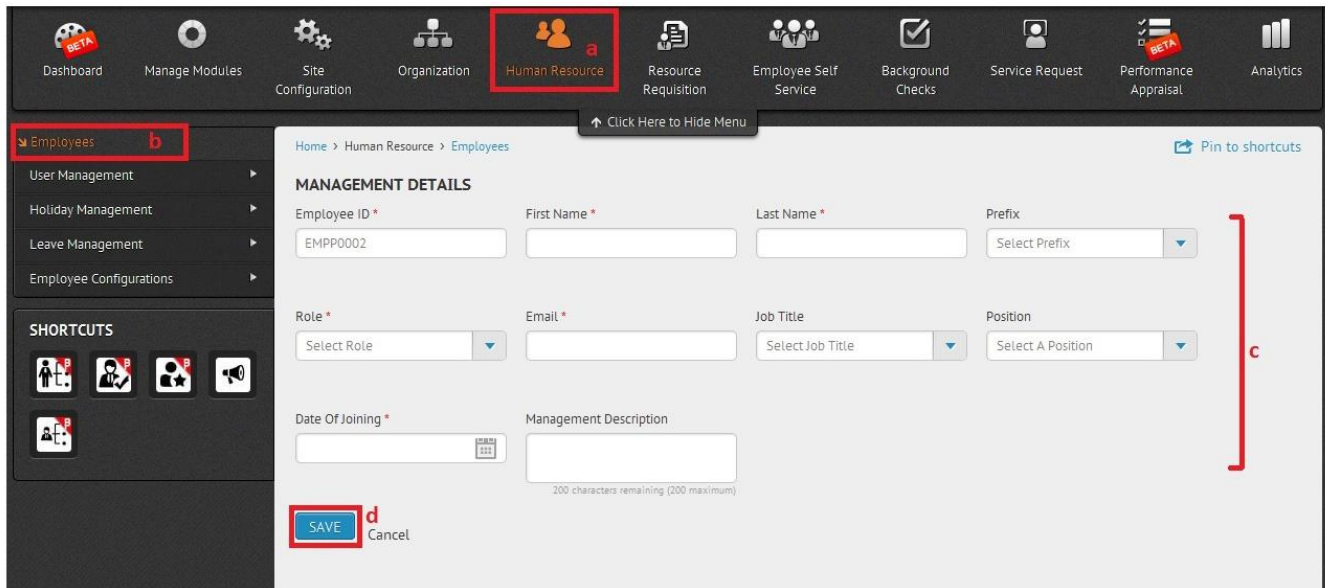
Figure 29

How do I Add an Employee:

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

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

Refer Figure 30



Home > Human Resource > Employees

MANAGEMENT DETAILS

Employee ID * First Name * Last Name * Prefix

Role * Email * Job Title Position

Date Of Joining * Management Description

200 characters remaining (200 maximum)

SAVE [Cancel](#)

Refer Figure 30

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

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

Refer Figure 31

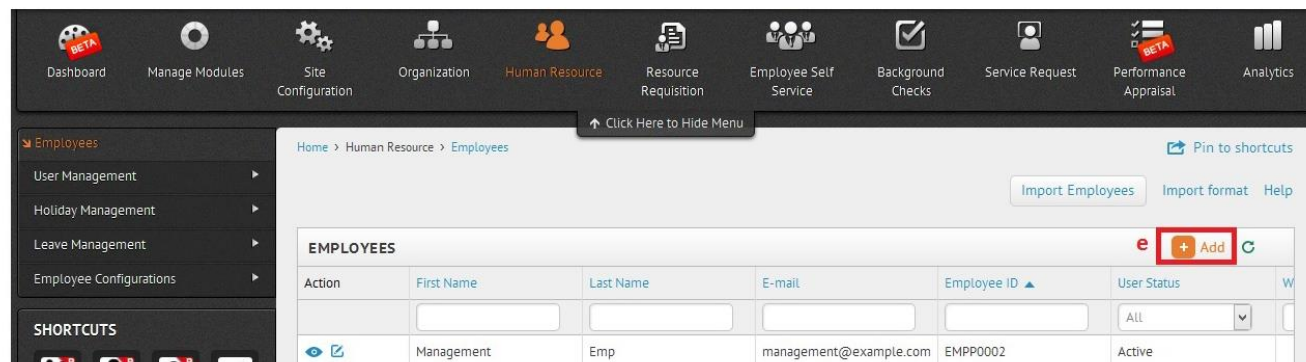
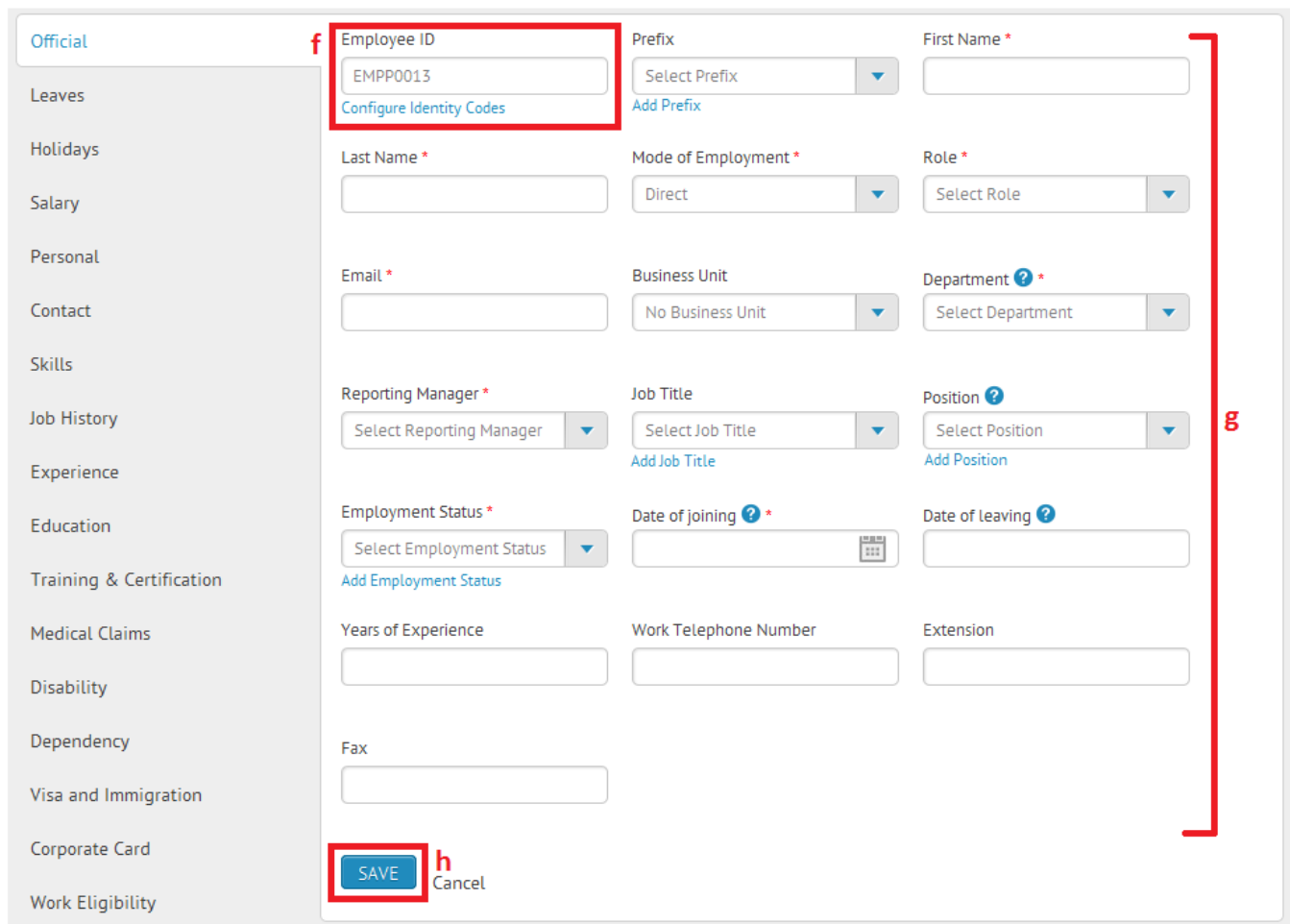


Figure 31

- f. The Employee ID will be auto populated by the application

- g. Enter the details respective to the employee
- h. Click on Save to add the employee

Refer Figure 32



The figure shows a web-based form for adding a new employee. On the left is a sidebar menu with various HR modules. The main form area contains several input fields and dropdown menus. A red box labeled 'f' highlights the 'Employee ID' field, which contains the text 'EMPP0013'. A red bracket labeled 'g' spans the right side of the form, indicating the area where employee details are entered. A red box labeled 'h' highlights the 'SAVE' button at the bottom left of the form.

Left Sidebar Menu:

- Official
- Leaves
- Holidays
- Salary
- Personal
- Contact
- Skills
- Job History
- Experience
- Education
- Training & Certification
- Medical Claims
- Disability
- Dependency
- Visa and Immigration
- Corporate Card
- Work Eligibility

Main Form Fields:

- Employee ID:** EMPP0013 (highlighted with red box 'f')
- Prefix:** Select Prefix (dropdown)
- First Name:** (text input)
- Last Name:** (text input)
- Mode of Employment:** Direct (dropdown)
- Role:** Select Role (dropdown)
- Email:** (text input)
- Business Unit:** No Business Unit (dropdown)
- Department:** Select Department (dropdown)
- Reporting Manager:** Select Reporting Manager (dropdown)
- Job Title:** Select Job Title (dropdown)
- Position:** Select Position (dropdown)
- Employment Status:** Select Employment Status (dropdown)
- Date of joining:** (calendar icon)
- Date of leaving:** (calendar icon)
- Years of Experience:** (text input)
- Work Telephone Number:** (text input)
- Extension:** (text input)
- Fax:** (text input)

Buttons:

- SAVE:** (highlighted with red box 'h')
- Cancel:** (text link)

Figure 32

How can I 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

Refer Figure 33

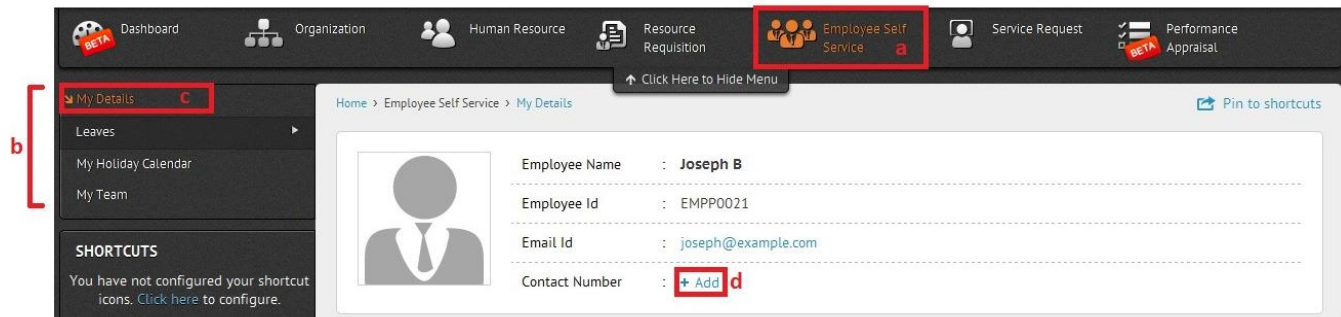


Figure 33

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

Refer Figure 34

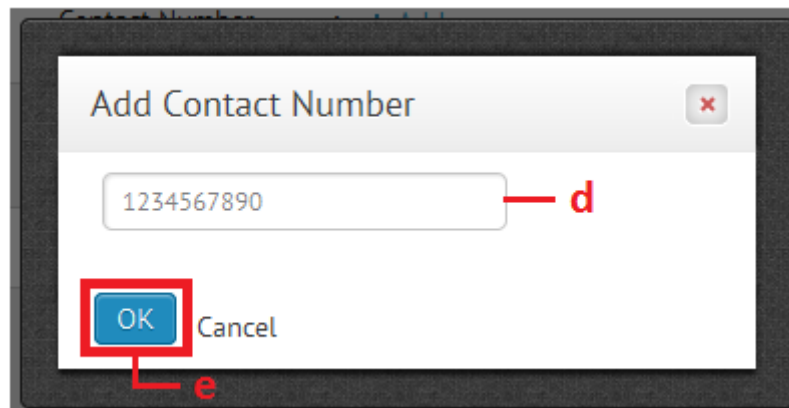
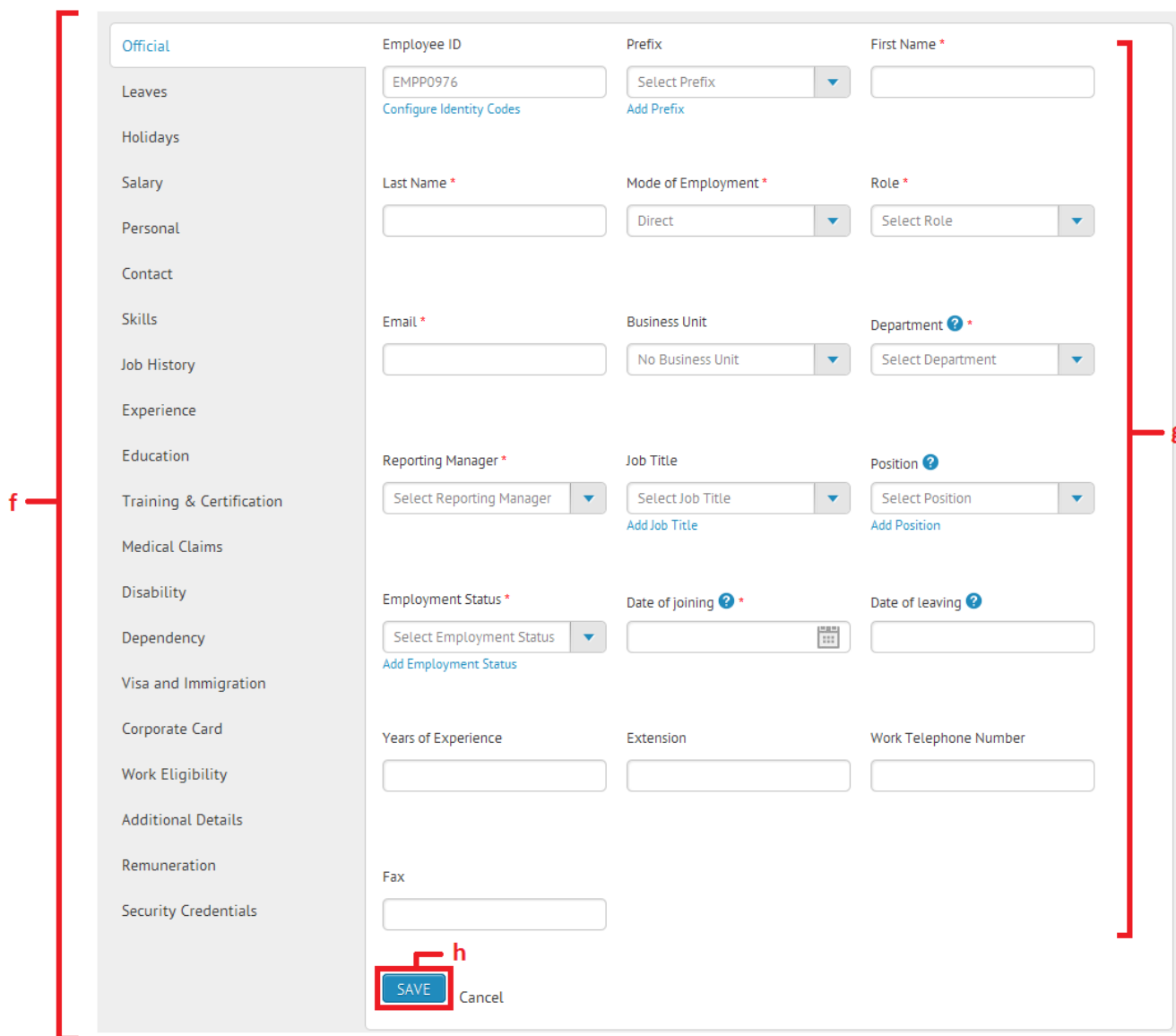


Figure 34

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

Refer Figure 35



Official

Employee ID: EMPP0976 [Configure Identity Codes](#)

Prefix: Select Prefix [Add Prefix](#)

First Name *

Last Name *

Mode of Employment *: Direct

Role *: Select Role

Email *

Business Unit: No Business Unit

Department ? *: Select Department

Reporting Manager *: Select Reporting Manager

Job Title: Select Job Title [Add Job Title](#)

Position ? : Select Position [Add Position](#)

Employment Status *: Select Employment Status [Add Employment Status](#)

Date of joining ? *:

Date of leaving ? :

Years of Experience:

Extension:

Work Telephone Number:

Fax:

SAVE [Cancel](#)

Figure 35

How to Add Employee Documents:

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

For employees to add documents:

- Click on Employee Self Service in the header
- Click on My Details in the left side menu
- Click on Document
- Click on New Document
- Enter the Document Name
- Click on Save to save the details
- These documents can be edited, deleted and downloaded

Refer Figure 36

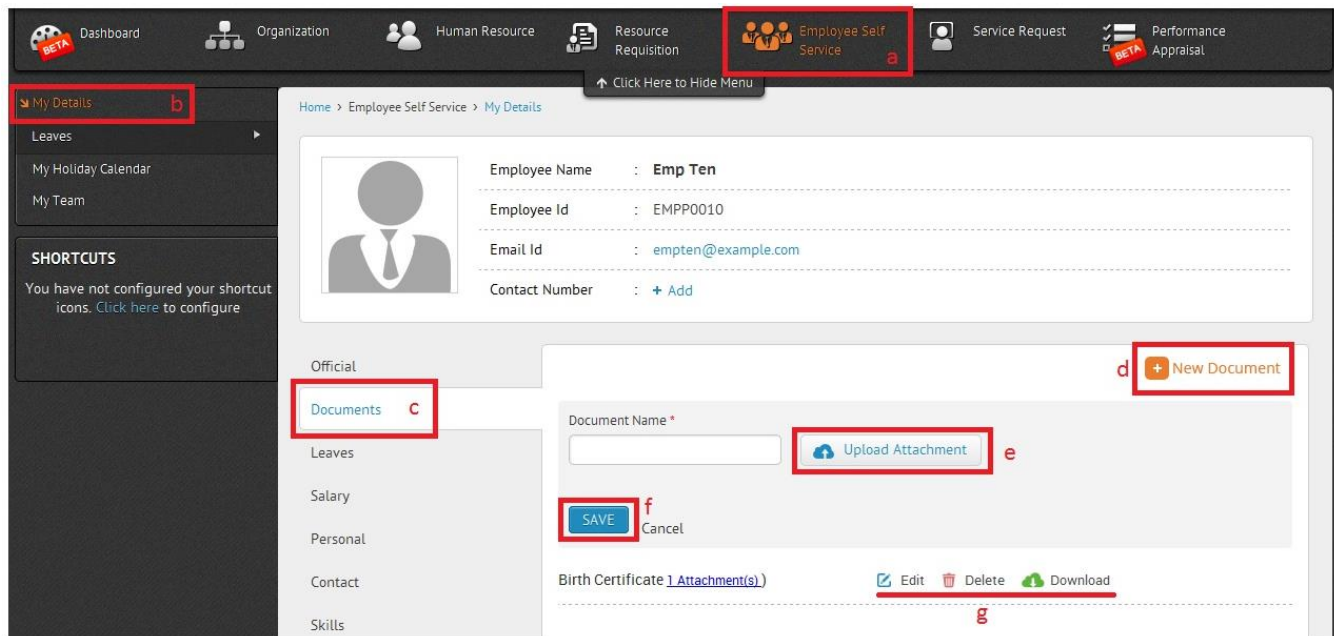


Figure 36

Want to Add Leave Management Options:

- Click on Human Resources 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

Refer Figure 37

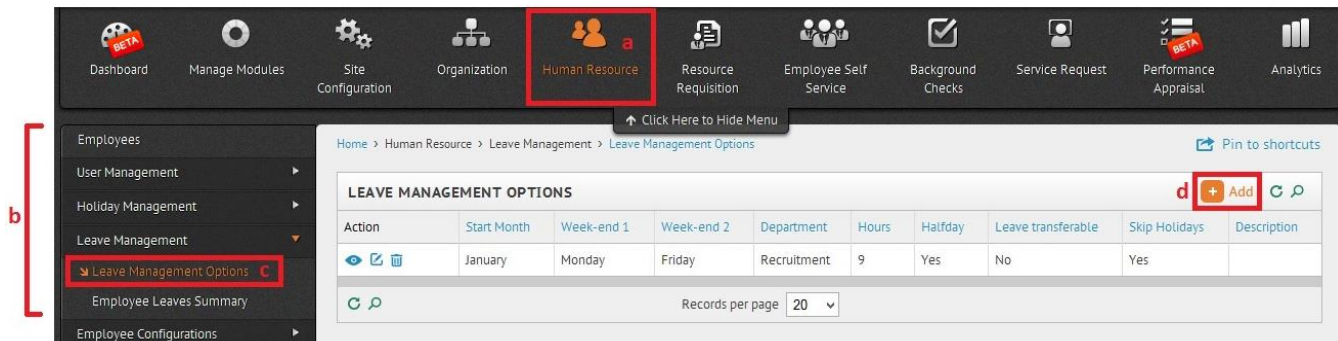
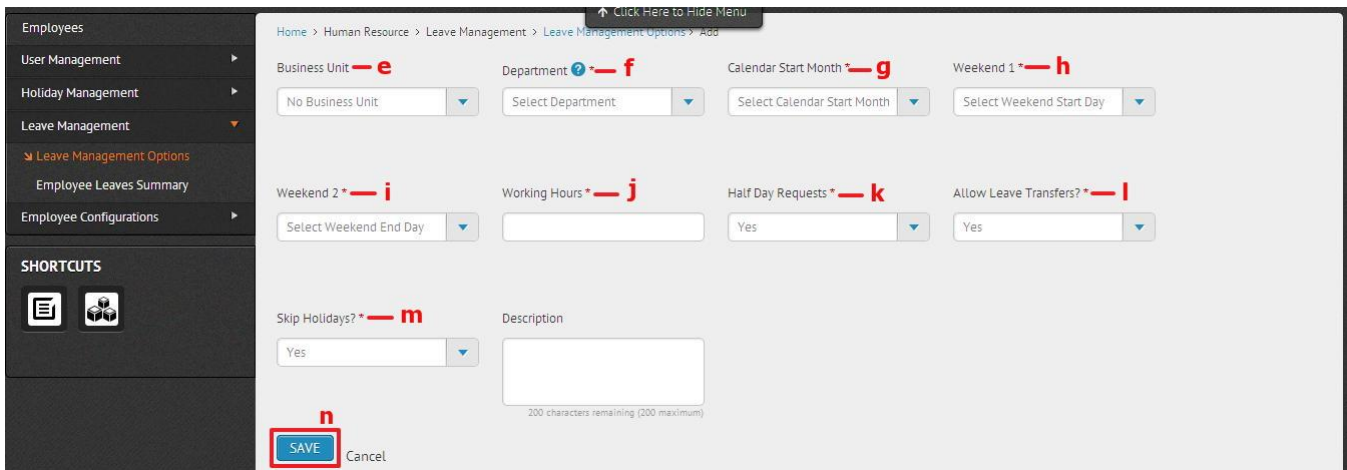


Figure 37

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

Refer Figure 38



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

Business Unit **e** Department **f** Calendar Start Month **g** Weekend 1 **h**

No Business Unit Select Department Select Calendar Start Month Select Weekend Start Day

Weekend 2 **i** Working Hours **j** Half Day Requests **k** Allow Leave Transfers? **l**

Select Weekend End Day Select Week End Day Yes Yes

Skip Holidays? **m** Description

Yes 200 characters remaining (200 maximum)

n SAVE Cancel

Figure 38

What if I want to Apply a Leave Request:

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

For further understanding, Refer Figure 39, which explain about adding leaves for the month of September

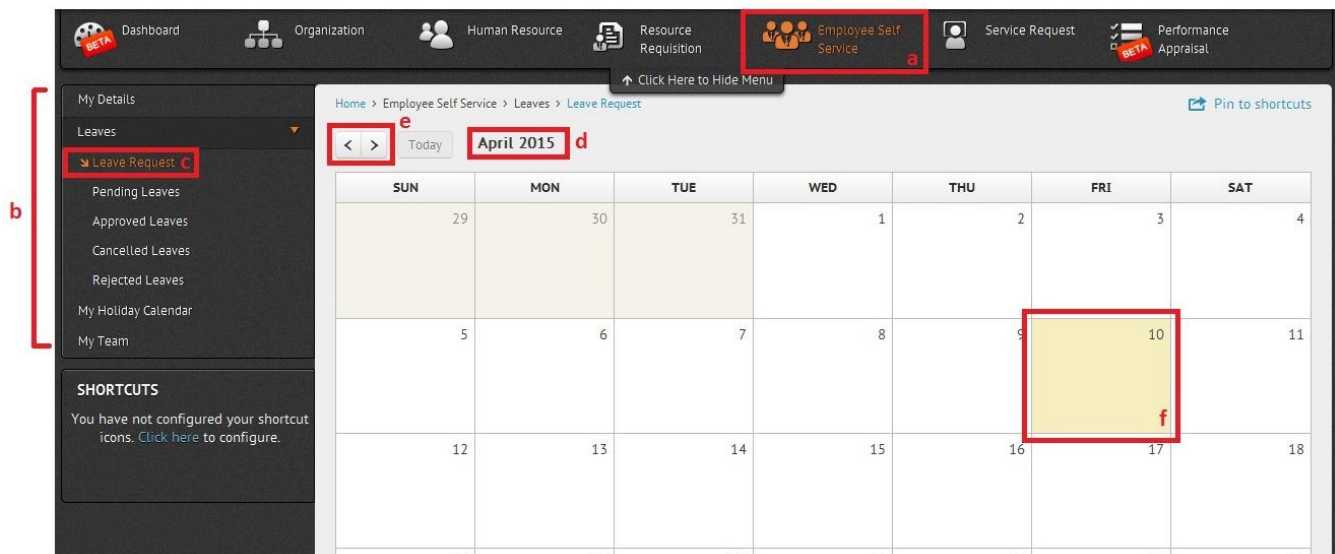


Figure 39

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

Refer Figure 40

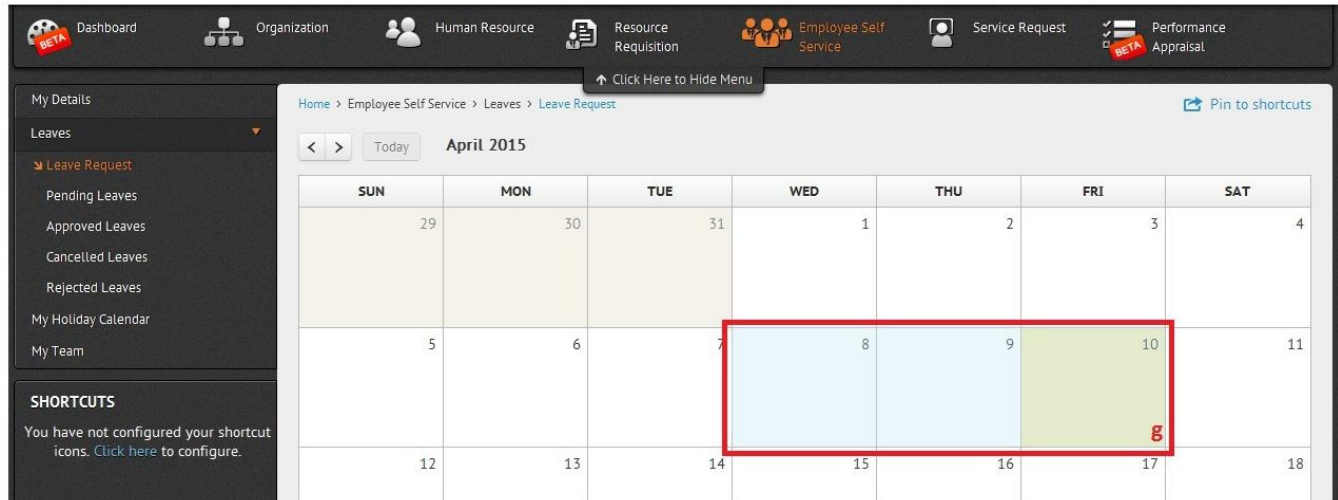


Figure 40

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

Refer Figure 41

Create: Leave Request

Available Leaves *

Reason *

Leave Type *

Leave *

From ? *

To ? *

Number of days

Reporting Manager *

APPLY

Cancel

Figure 41

How do I Cancel my Leave Request:

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

Refer Figure 42

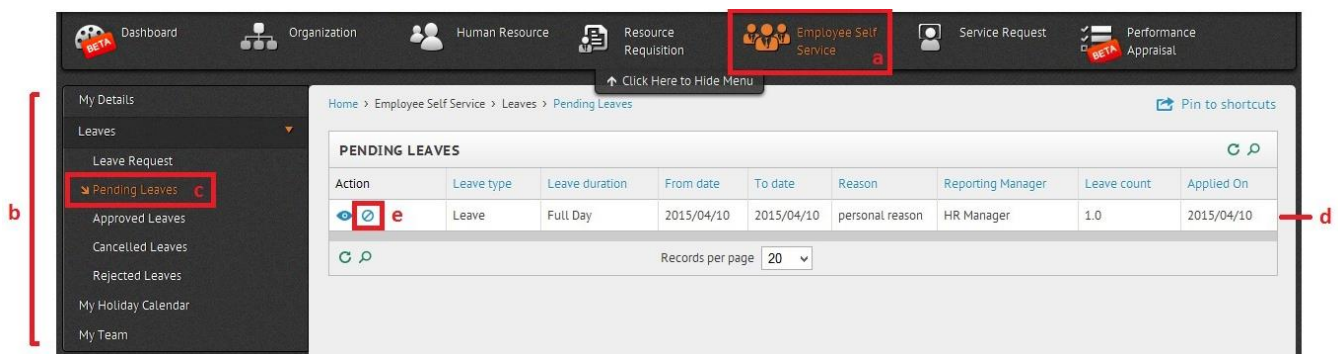


Figure 42

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

Refer Figure 43

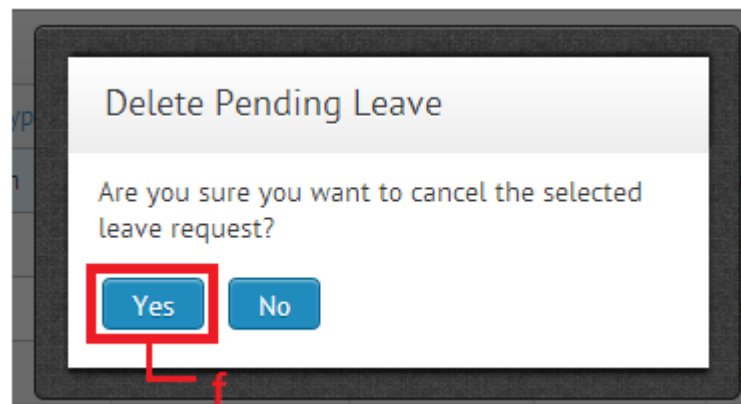


Figure 43

How to Approve or Reject Leave Requests:

- Click on Employee 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

Refer Figure 44

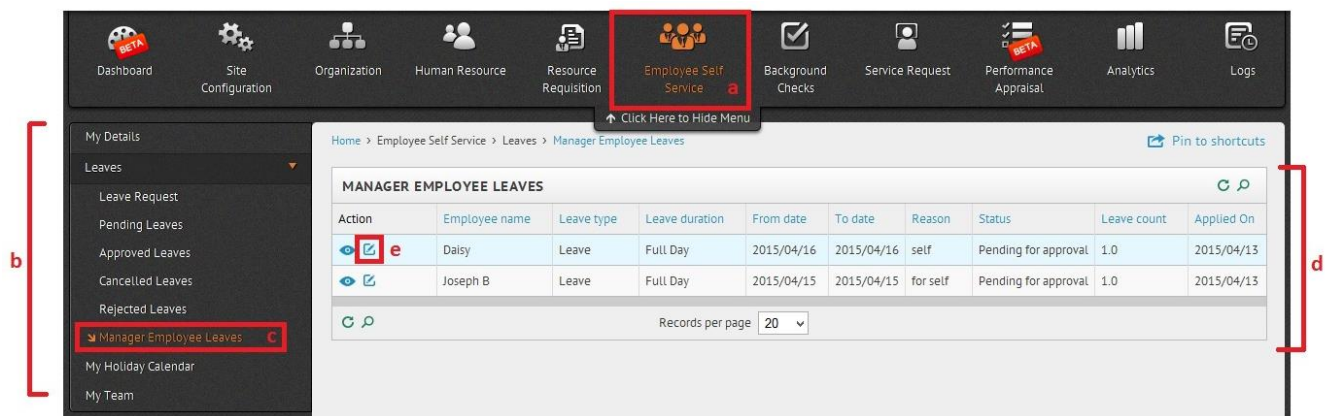


Figure 44

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

Refer Figure 45

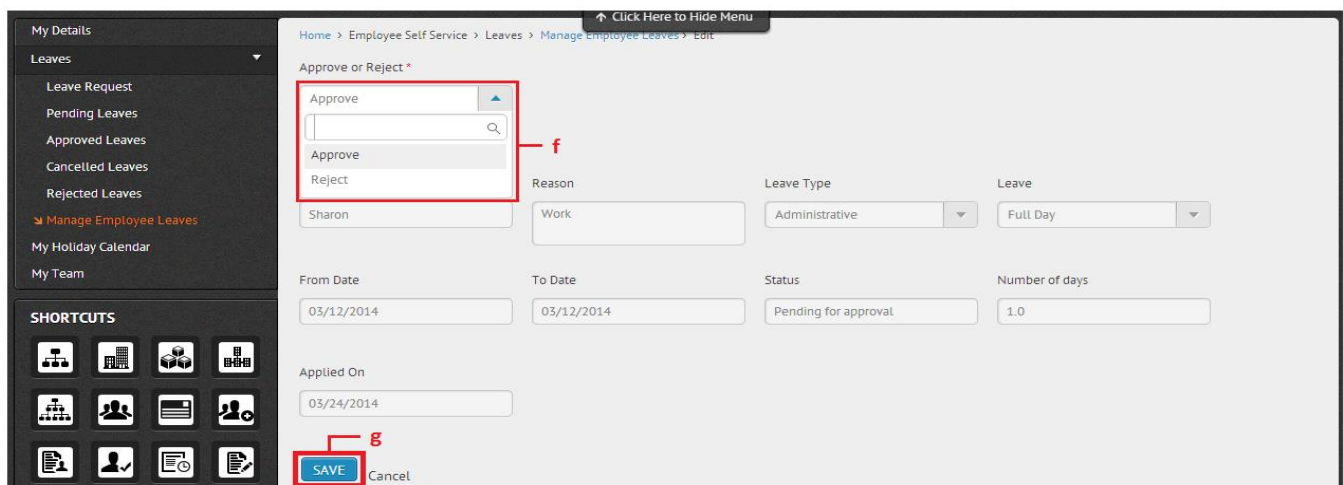


Figure 45

How do I Raise a Resource Requisition:

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

Refer Figure 46

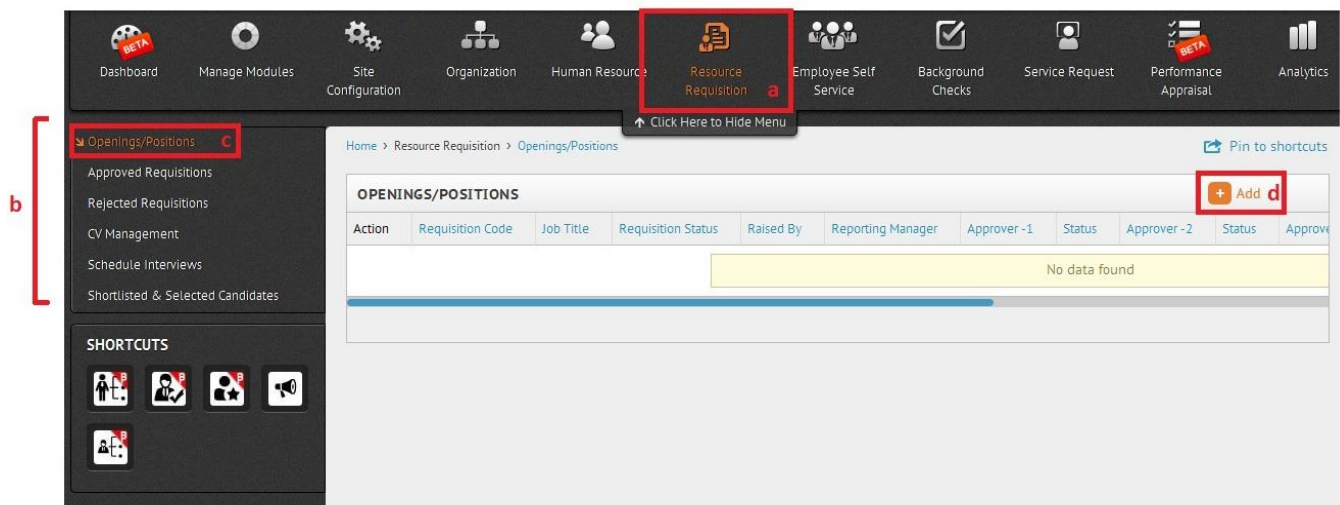
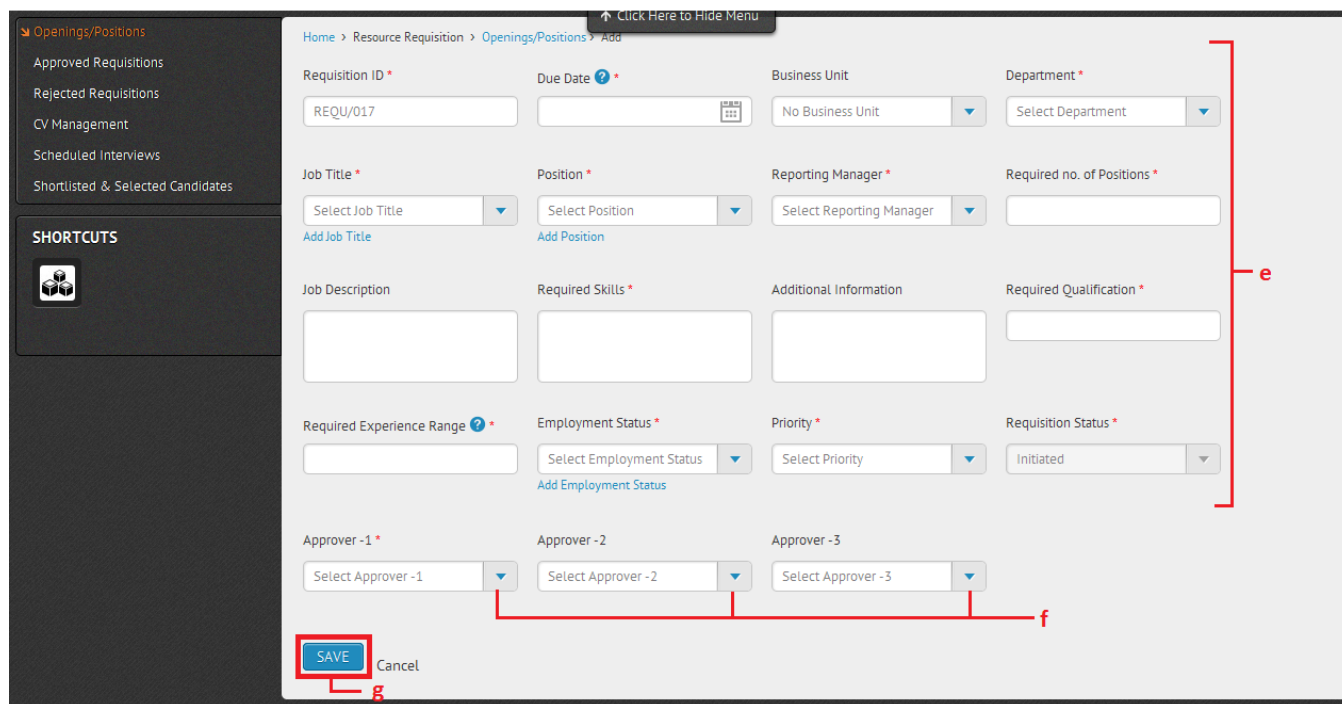


Figure 46

- 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 47



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 47

Where do I Add Screening Type for Background Checks:

- Click on Background Checks 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

Refer Figure 48

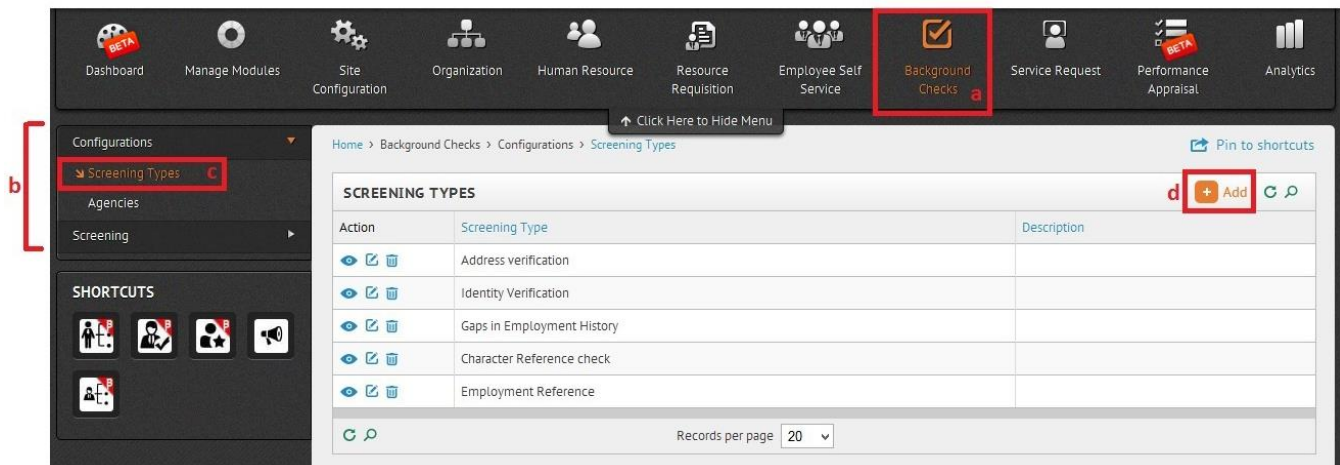


Figure 48

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

Refer Figure 49

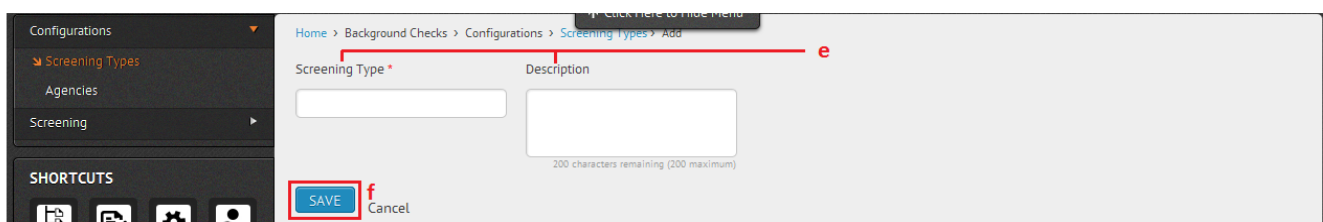


Figure 49

How do I Add an Agency to Perform Background Checks:

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

Refer Figure 50

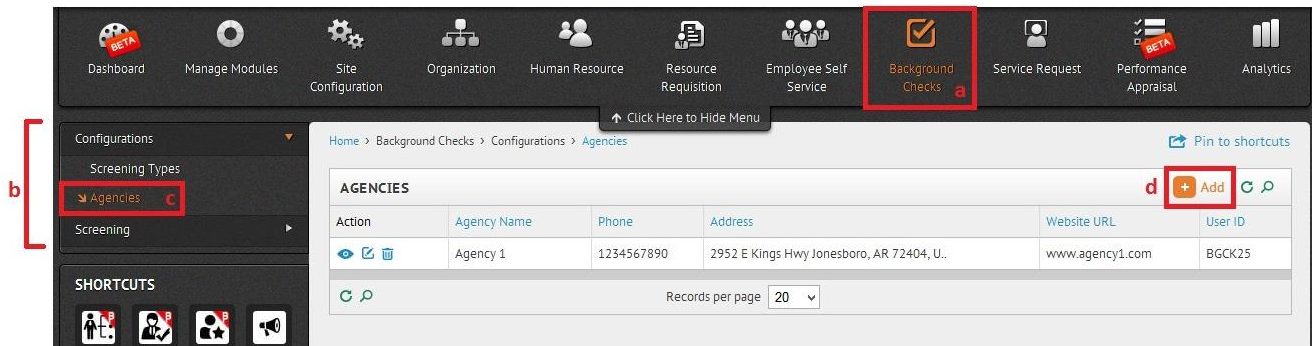
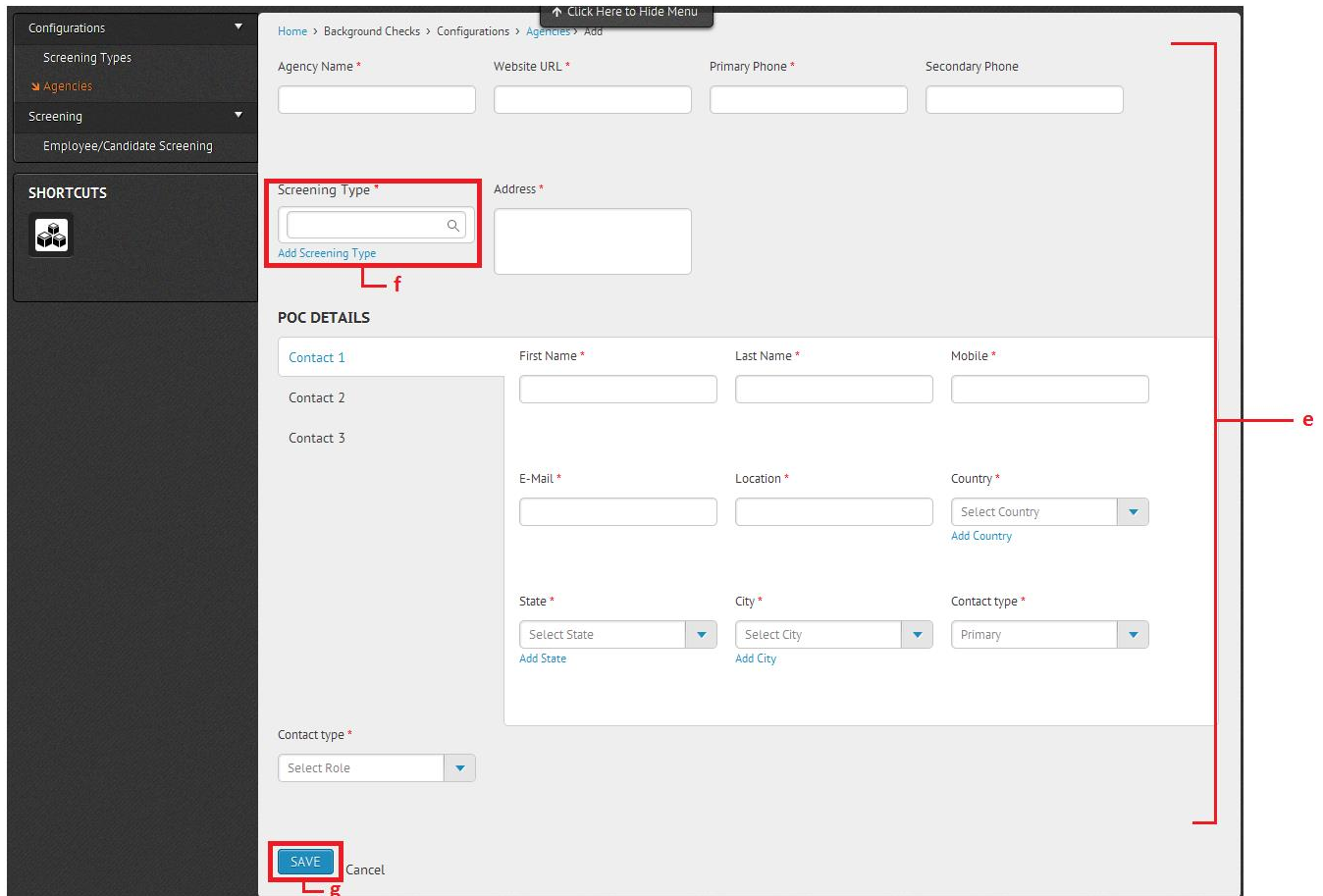


Figure 50

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

Refer Figure 51



Configurations

Screening Types

Agencies

Screening

Employee/Candidate Screening

SHORTCUTS

Home > Background Checks > Configurations > Agencies > Add

Agency Name *

Website URL *

Primary Phone *

Secondary Phone

Screening Type *

Add Screening Type

Address *

POC DETAILS

Contact 1

First Name *

Last Name *

Mobile *

Contact 2

E-Mail *

Location *

Country *

Select Country

Add Country

Contact 3

State *

City *

Contact type *

Select State

Select City

Primary

Add State

Add City

Contact type *

Select Role

SAVE

Cancel

Figure 51

Can I Send an Employee for Background Checks:

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

Refer Figure 52

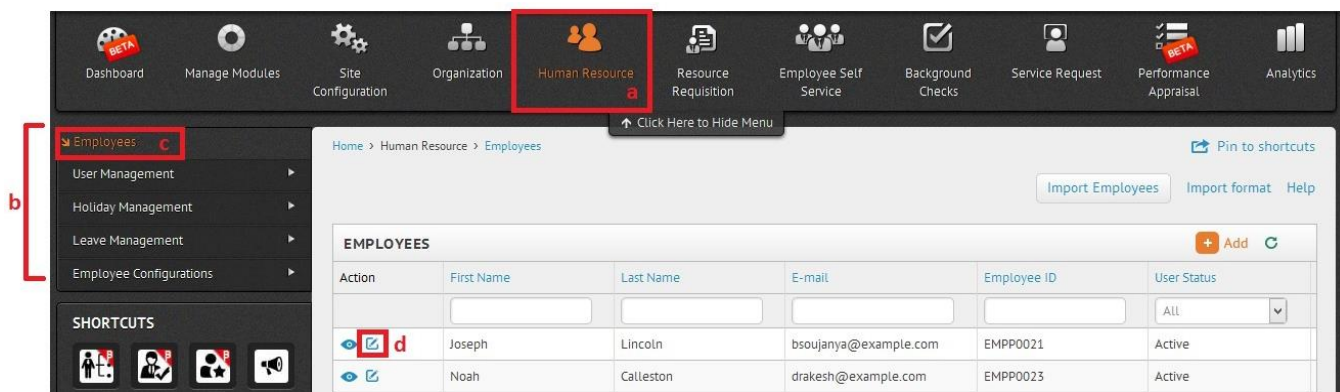


Figure 52

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

Refer Figure 53

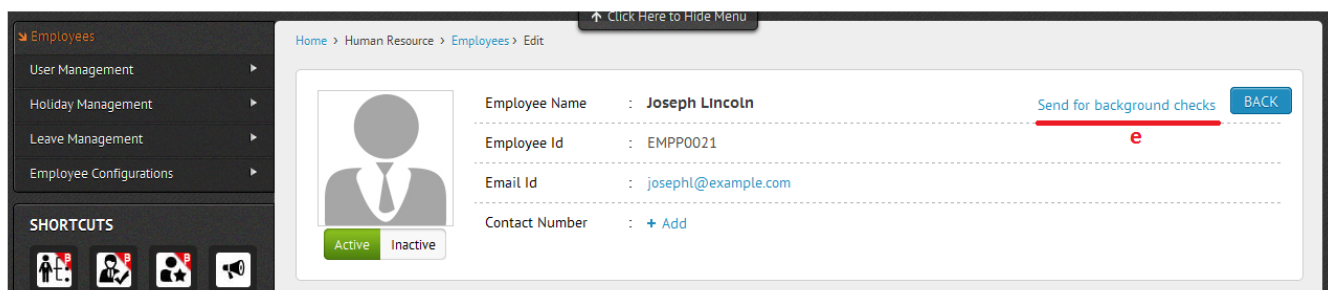


Figure 53

Want to 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

Refer Figure 54

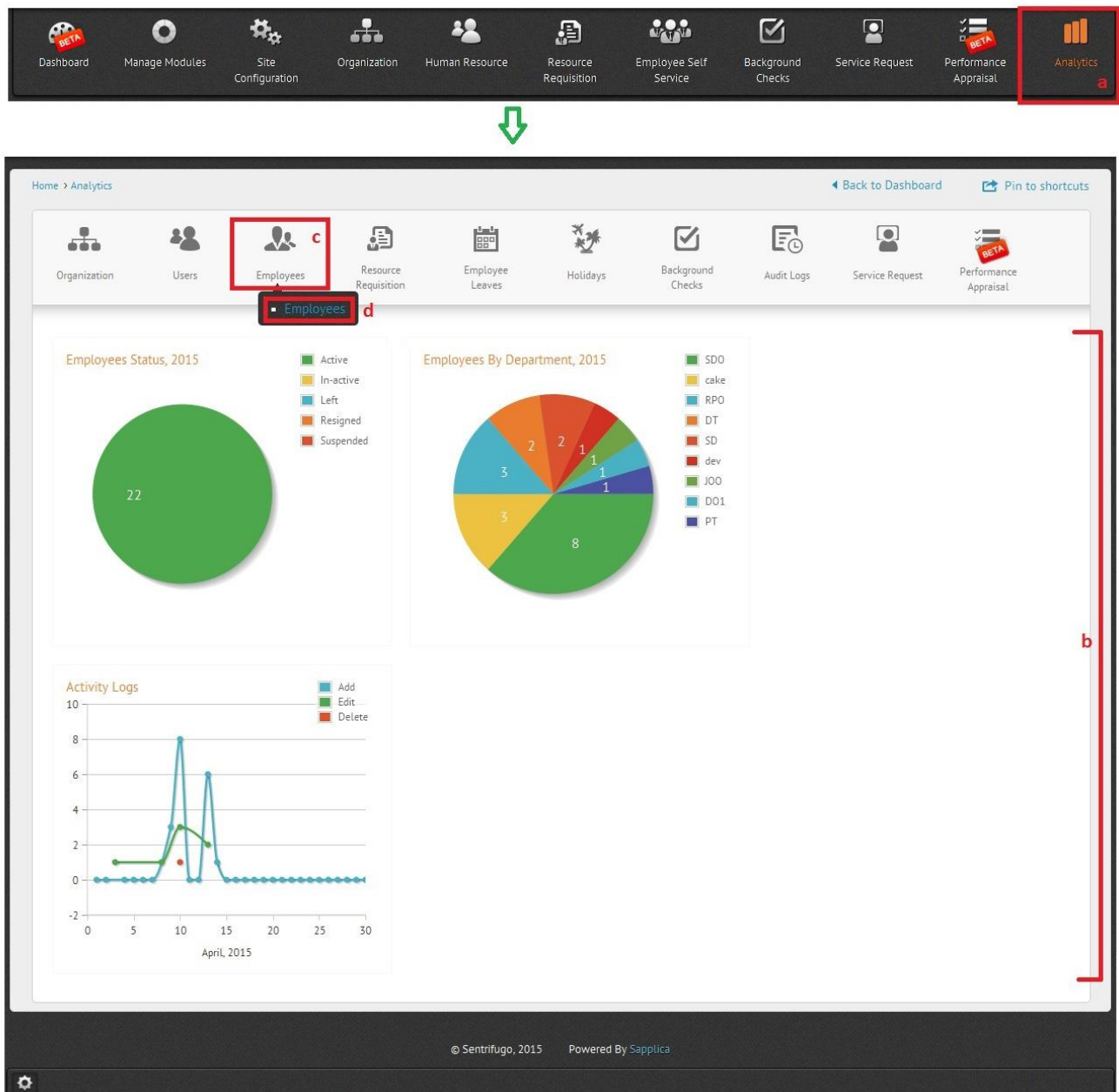


Figure 54

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

Refer Figure 55

[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

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	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	emppp1@example.com	--	Employee	Jennifer	Quality Analyst	Employee
EMPP-0019	Mrs. Daniel	vsunitha32@yahoo.com	--	Employee	reciever and manager	Software Engineer	Sr Employee
EMPP-0034	Miss. gfgfdg	gf@example.com	--	Employee	Anderson neo	Quality controller	Sr QC

Records per page

20

Page 1 of 2

Figure 55

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 56

[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

g 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. gfgfdg	gf@example.com	--	Employee	Anderson neo	Quality controller	Sr QC

Records per page

20

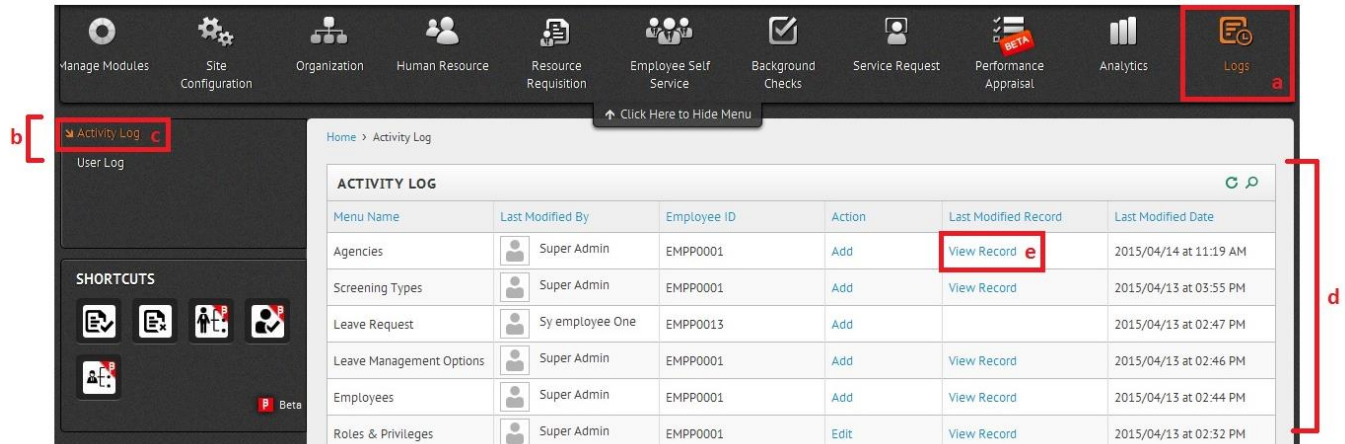
[Page 1 of 2](#)

Figure 56

Where can you View Activity log:

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

Refer Figure 57



The screenshot shows the Sentrifugo interface with the 'Logs' menu item highlighted in the top navigation bar (a). The left sidebar shows 'Activity Log' selected (b), with 'User Log' as a submenu item (c). The main content area displays the 'ACTIVITY LOG' table (d).

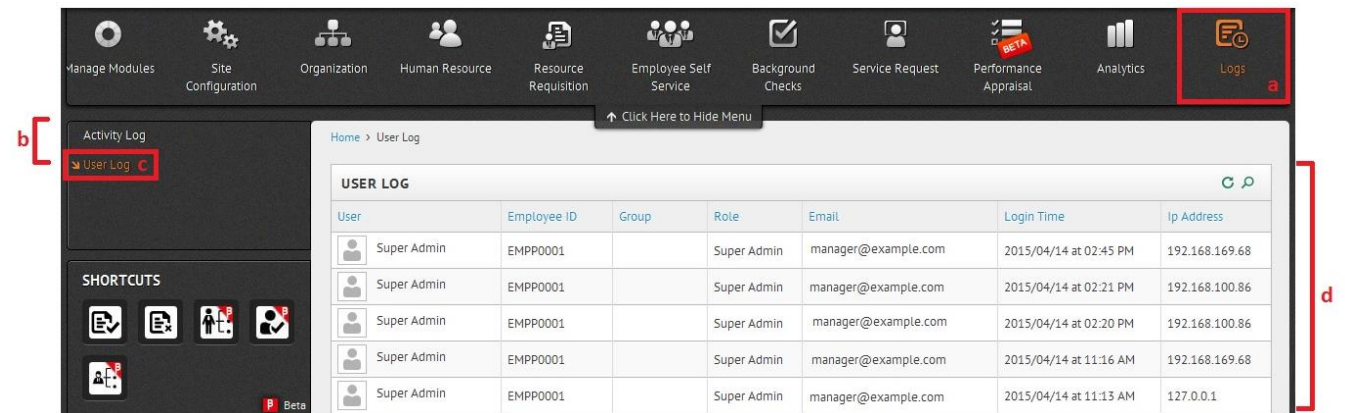
Menu Name	Last Modified By	Employee ID	Action	Last Modified Record	Last Modified Date
Agencies	Super Admin	EMPP0001	Add	View Record e	2015/04/14 at 11:19 AM
Screening Types	Super Admin	EMPP0001	Add	View Record	2015/04/13 at 03:55 PM
Leave Request	Sy employee One	EMPP0013	Add		2015/04/13 at 02:47 PM
Leave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

Figure 57

Where can I View User log:

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

Refer Figure 58



The screenshot shows the Sentrifugo interface with the 'Logs' menu item highlighted in the top navigation bar (a). The left sidebar shows 'User Log' selected (b), with 'Activity Log' as a submenu item (c). The main content area displays the 'USER LOG' table (d).

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

Figure 58

Looking to Set Shortcuts:

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

Refer Figure 59

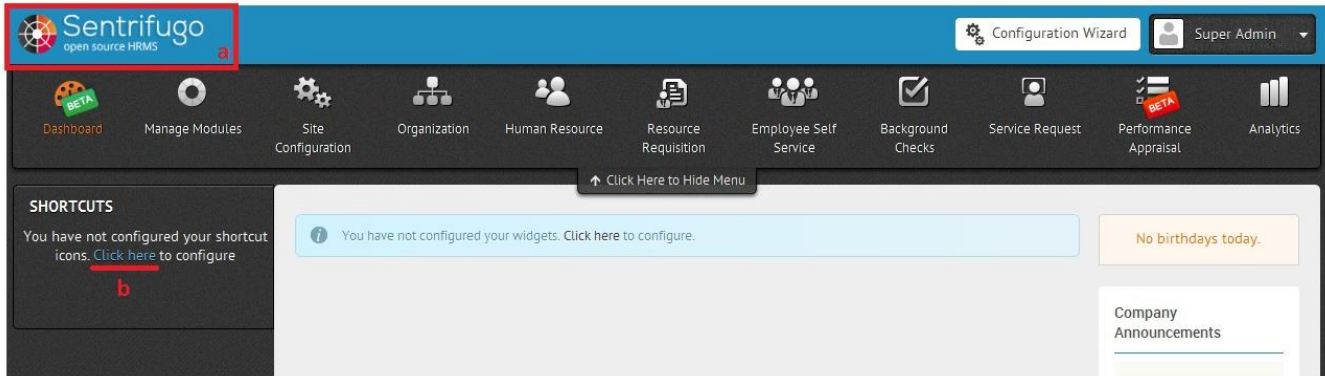


Figure 59

Or

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

Refer Figure 60

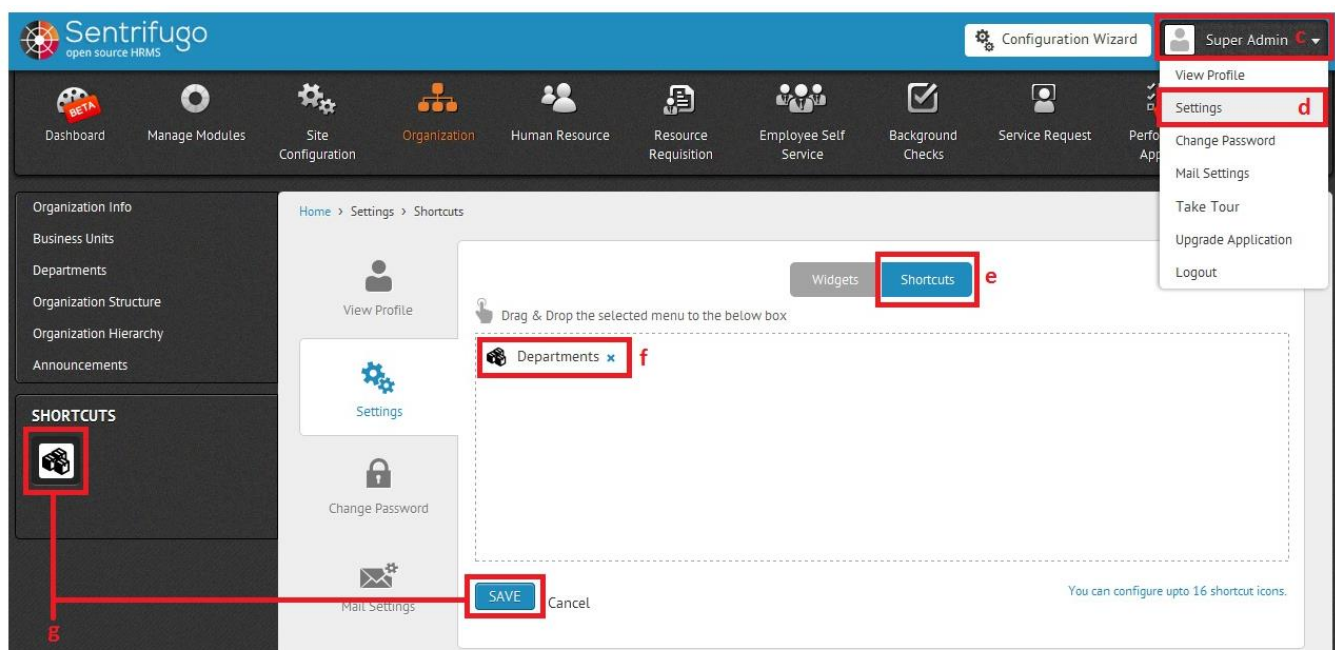


Figure 60

You can also create Shortcuts as you browse through the application

- p. Click on a desired module in the top menu
- q. Click on the desired submenu in the left side panel
- r. Click on Create Shortcut in the right side panel

For further understanding, Refer Figure 61, which explains about creating a shortcut as you browse through the application

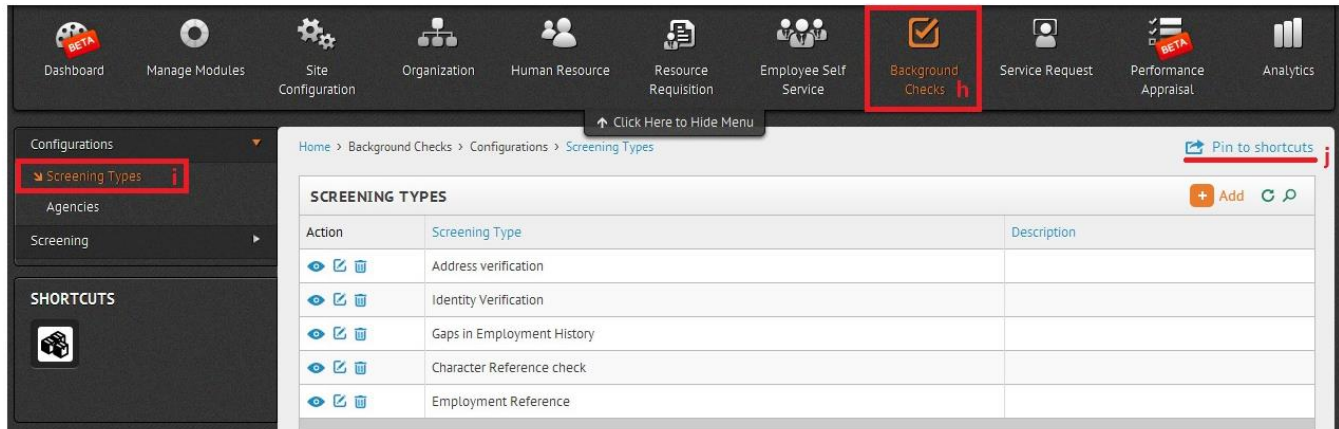


Figure 61

Looking to Set Widgets:

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

Refer figure 62

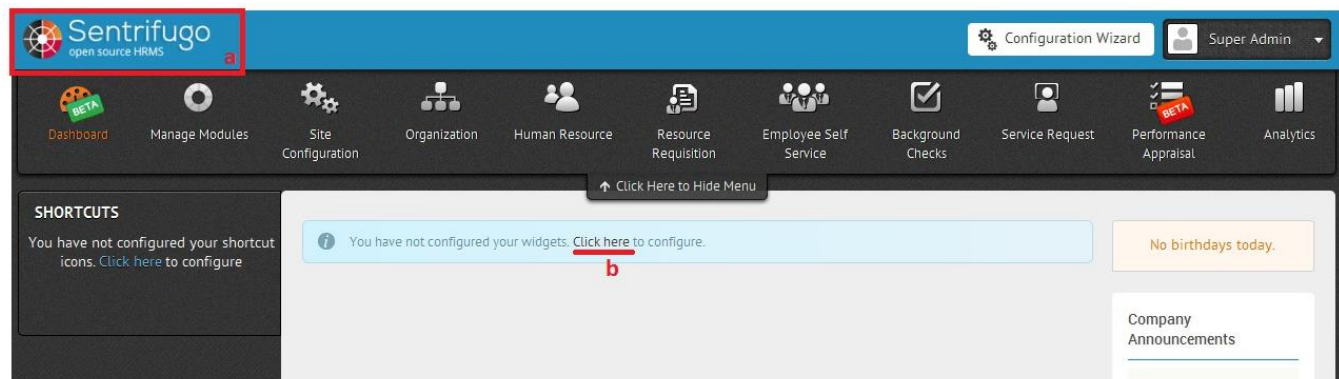


Figure 62

Or

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

Or

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

Refer Figure 63

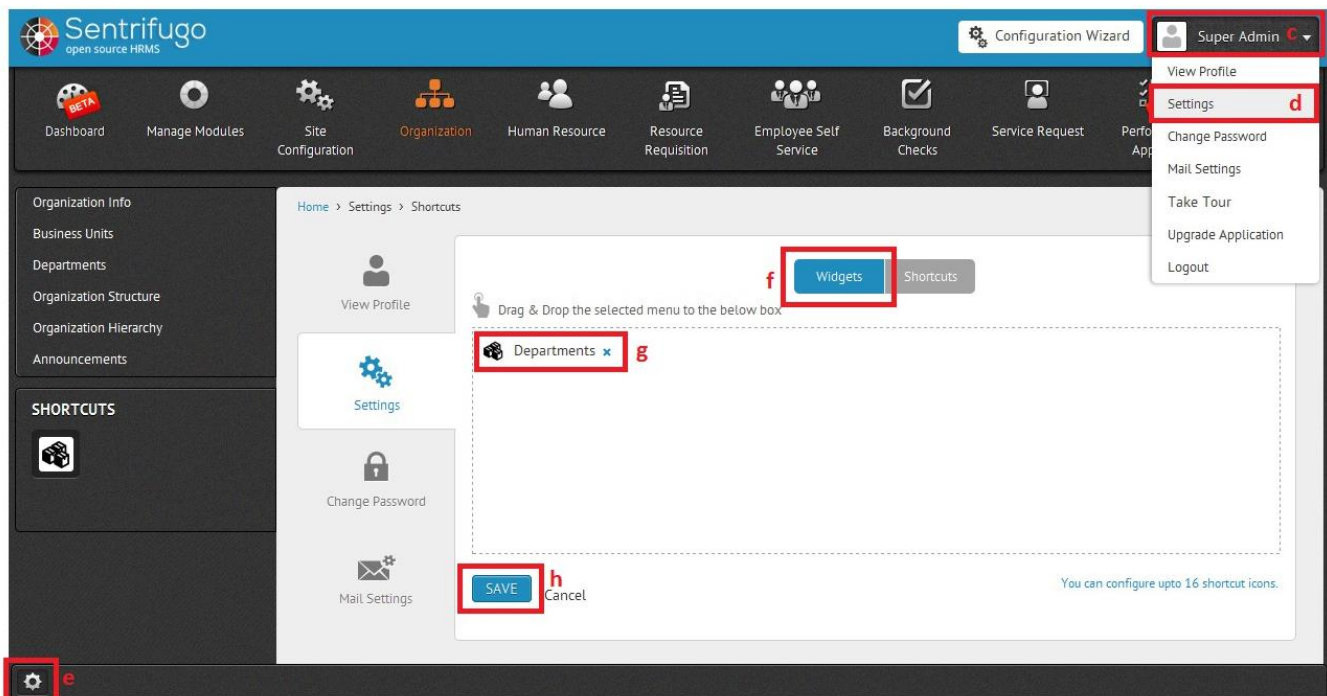
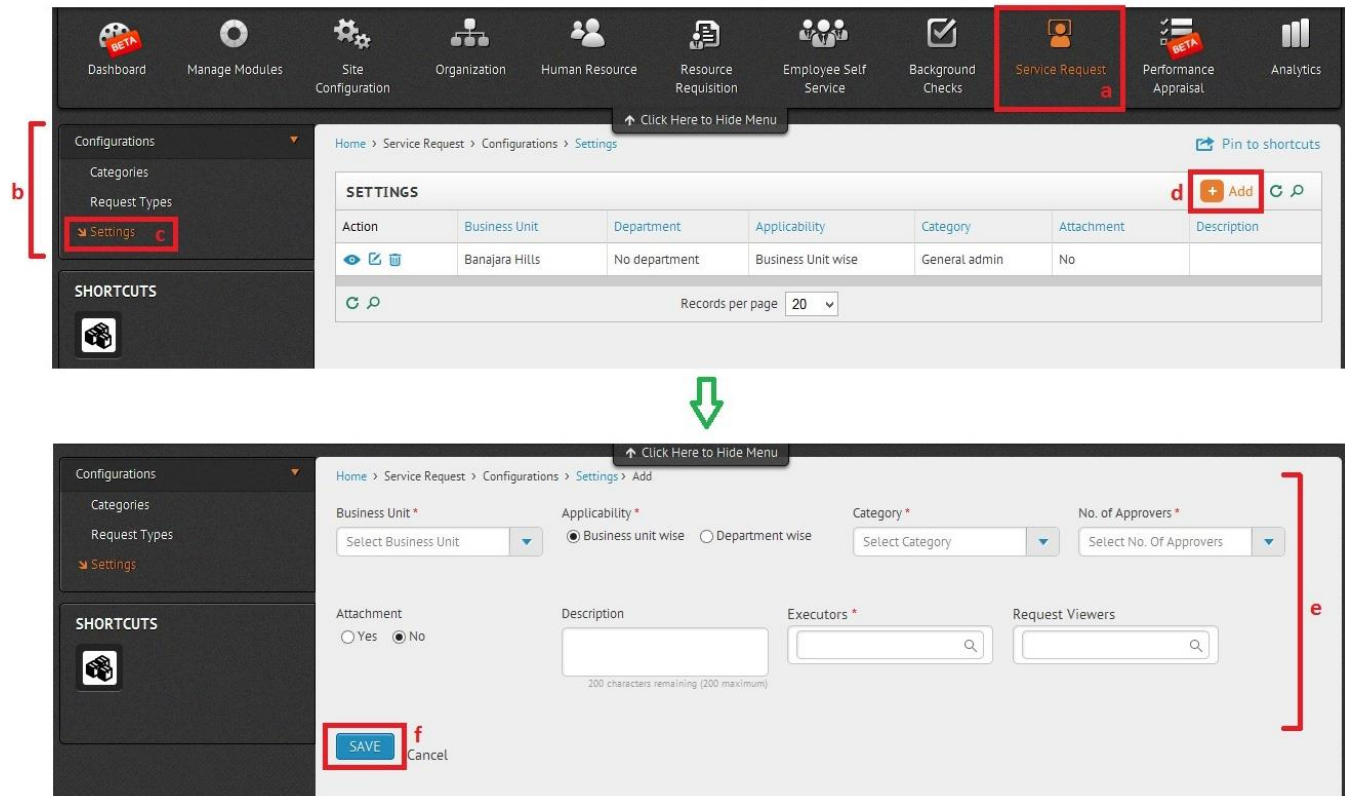


Figure 63

Want to Configure Service Request:

- Click on the Service Request in the top menu
- The left side panel will display the submenus
- Click on desired submenu
- Click on Add button on the right side panel
- Enter the Required details
- Click Save button to add the details

For further understanding refer to Figure 64, which explains about adding Settings



The figure illustrates the process of adding a new service request configuration in Sentrifugo. It is divided into two parts by a green downward arrow.

Top Part: Service Request Configuration List

- Navigation:** The top menu bar has 'Service Request' (labeled 'a'). The left sidebar shows 'Configurations' > 'Settings' (labeled 'b' and 'c').
- Table:** A table titled 'SETTINGS' displays existing configurations. The columns are: Action, Business Unit, Department, Applicability, Category, Attachment, and Description. One row is visible with values: Banajara Hills, No department, Business Unit wise, General admin, No.
- Buttons:** An 'Add' button (labeled 'd') is located at the top right of the table.

Bottom Part: Add Service Request Configuration Form

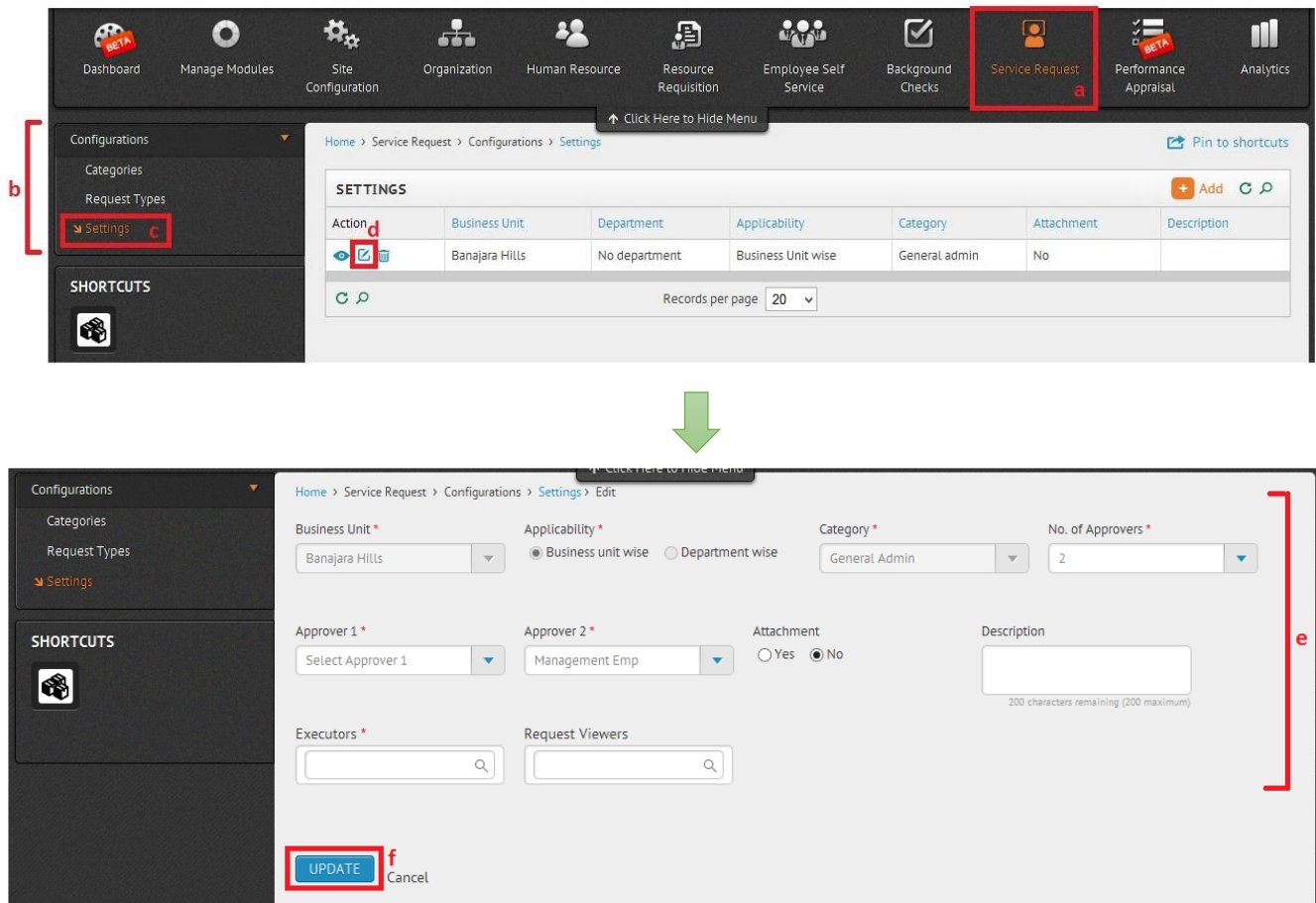
- Navigation:** The breadcrumb trail is 'Home > Service Request > Configurations > Settings > Add'.
- Form Fields:**
 - Business Unit ***: A dropdown menu.
 - Applicability ***: Radio buttons for 'Business unit wise' (selected) and 'Department wise'.
 - Category ***: A dropdown menu.
 - No. of Approvers ***: A dropdown menu.
 - Attachment**: Radio buttons for 'Yes' and 'No' (selected).
 - Description**: A text input field with a 200-character limit.
 - Executors ***: A text input field with a search icon.
 - Request Viewers**: A text input field with a search icon.
- Buttons:** A 'SAVE' button (labeled 'f') and a 'Cancel' button are at the bottom left.

Figure 64

Want to Edit Service Request:

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

Refer Figure 65



The figure consists of two screenshots of the Sentrifugo HRMS interface, connected by a green downward arrow. The top screenshot shows the main dashboard with the 'Service Request' menu item highlighted in red (labeled 'a'). The left sidebar shows the 'Settings' option under 'Request Types' highlighted in red (labeled 'c'). The main content area shows a table of Service Request configurations. The first row is highlighted, and the 'Action' column contains an edit icon (labeled 'd'). The bottom of the table shows 'Records per page' set to 20. The bottom screenshot shows the 'Edit' form for a Service Request configuration. The form includes fields for 'Business Unit' (Banajara Hills), 'Applicability' (Business unit wise), 'Category' (General Admin), and 'No. of Approvers' (2). It also has fields for 'Approver 1', 'Approver 2', 'Attachment' (Yes/No), and 'Description'. At the bottom, there is an 'UPDATE' button (labeled 'f') and a 'Cancel' button. The left sidebar shows the 'Settings' option highlighted in orange. A red bracket on the right side of the form is labeled 'e'.

Figure 65

How to Delete Service Request:

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

Refer to Figure 66

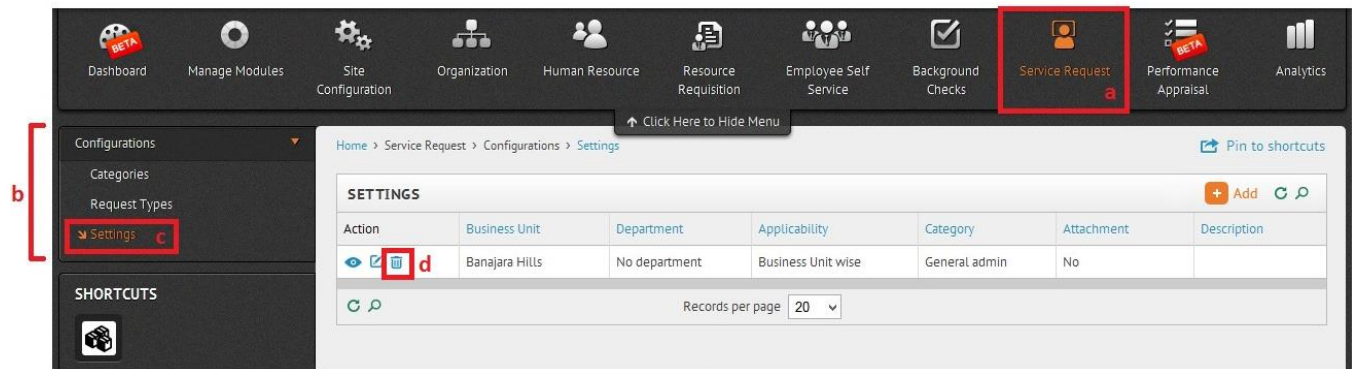


Figure 66

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

Refer to Figure 67

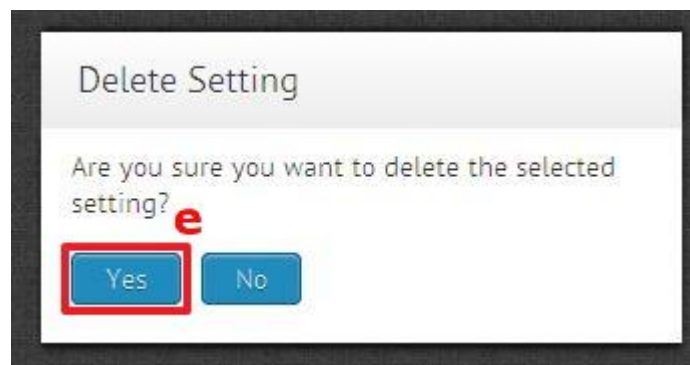


Figure 67

How do I set Cron Jobs:

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

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

Refer Figure 68

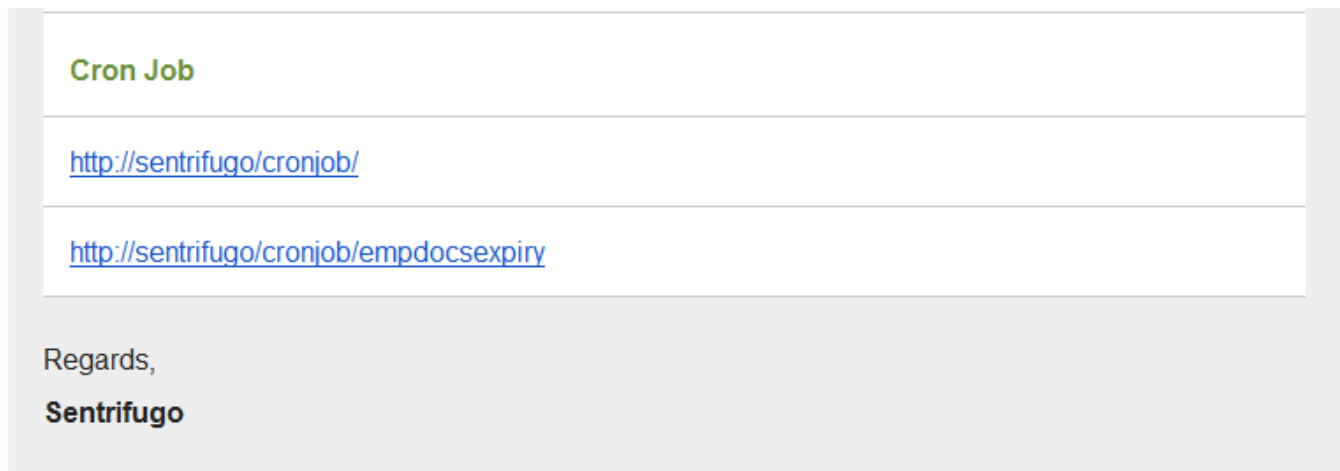


Figure 68

How to Download Import Format

- Click on Human Resources 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 hand side
- For further guidance, click on Help link

Refer to figure 69

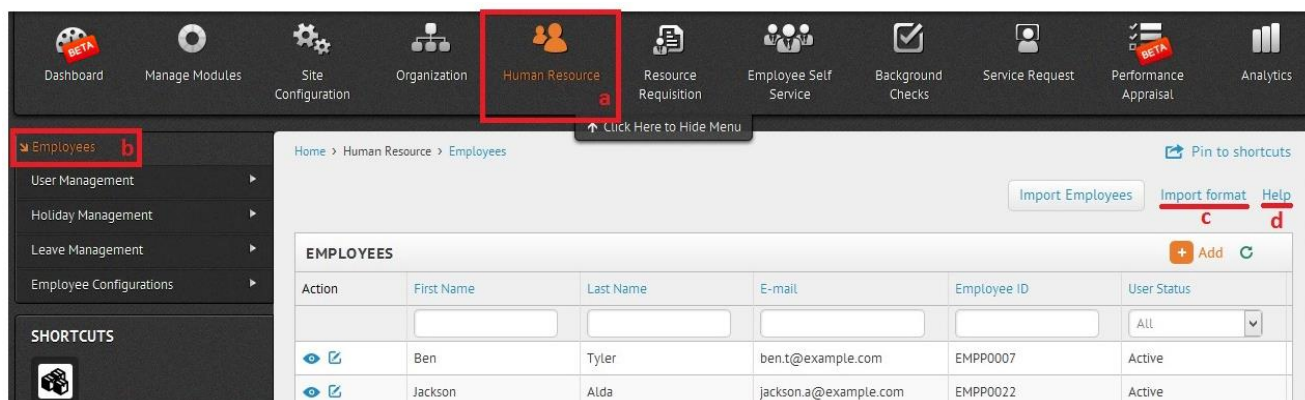


Figure 69

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

Refer Figure 70 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	ACC	ACC	EM03	SE	Manager	PROB	20-12-2012								
Mrs	Tina	Wilson	Employee	tina.wilson@example.com	ACC	ACC	EM03	SE	Trainer	PROB	20-12-2012								

Figure 70

From where do I pick the Import format details

a. Prefix

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

Refer Figure 71

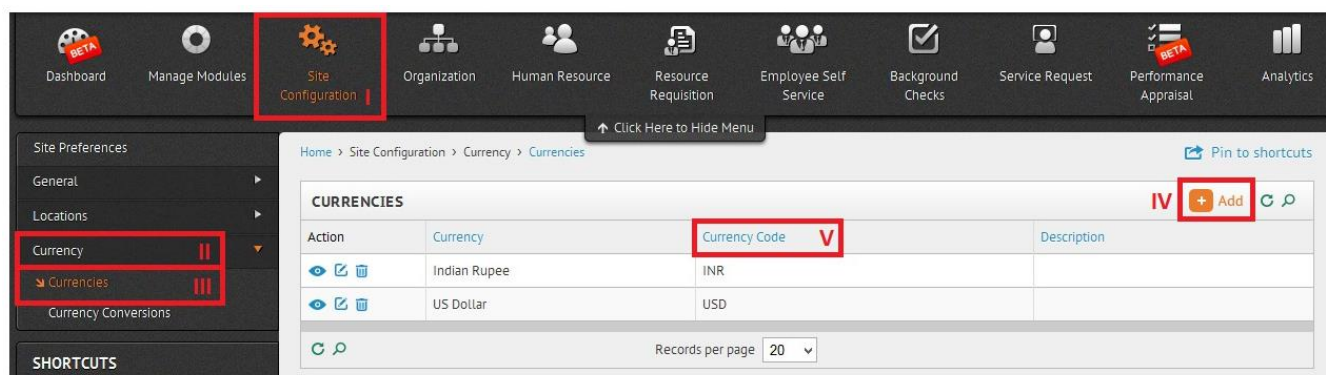


Figure 71

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

b. Enter the First and Last Name of the employee

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

Refer Figure 72


A	B	C	D	E
Prefix	First Name	Last Name	Role Type	Email
				

Figure 72

c. Role Type

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

Refer Figure 73

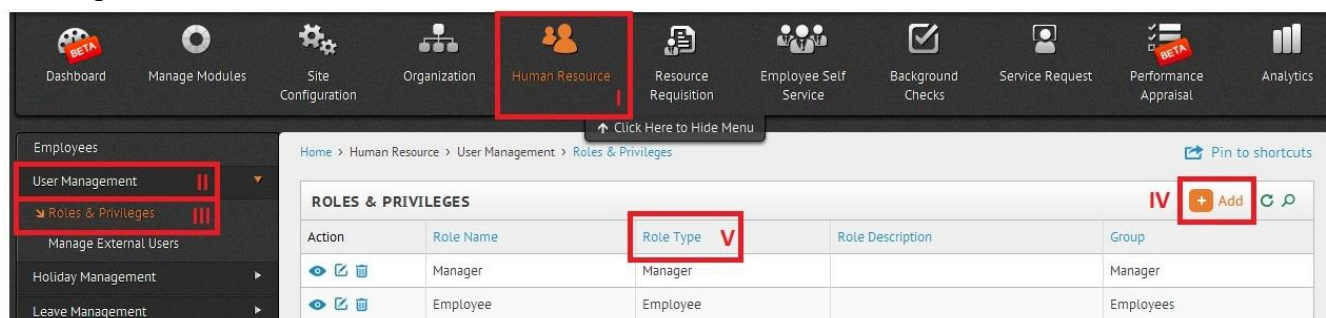


Figure 73

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

d. Enter the email of the employee

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

Refer figure 74

	C	D	E
ne	Role	Email	Business Unit

Figure 74

e. Business Unit

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

Refer Figure 75

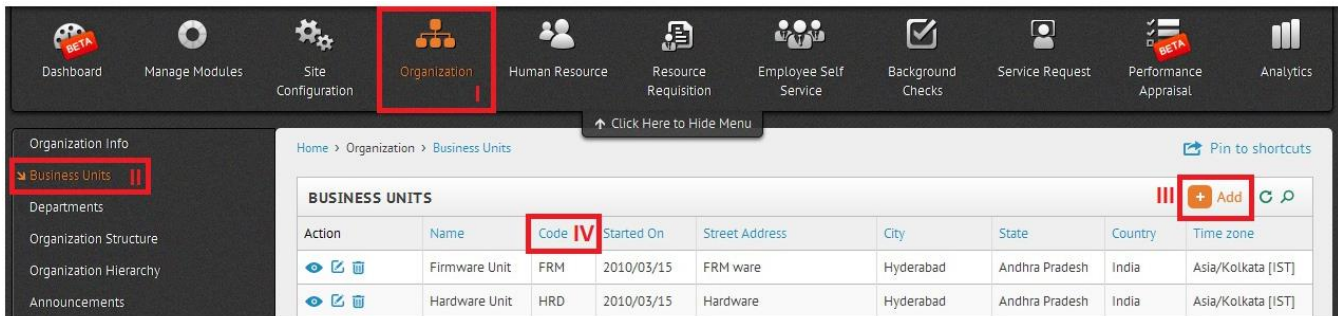


Figure 75

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

f. Departments

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

Refer Figure 76

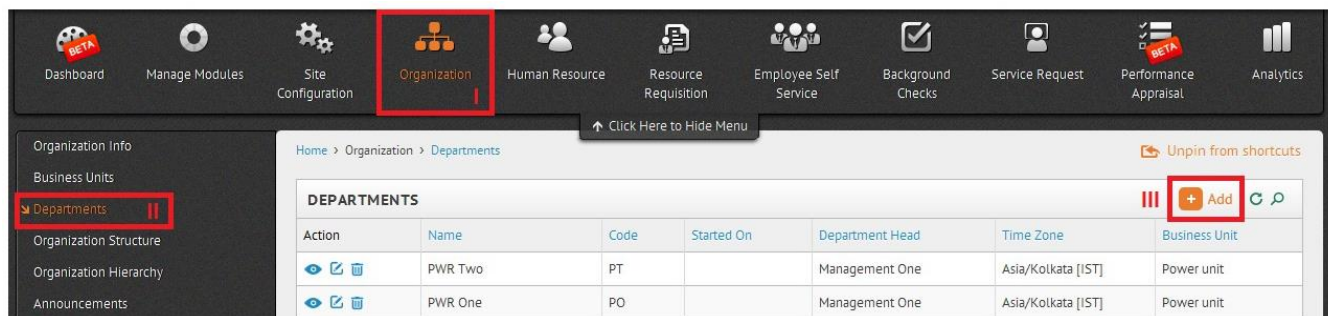


Figure 76

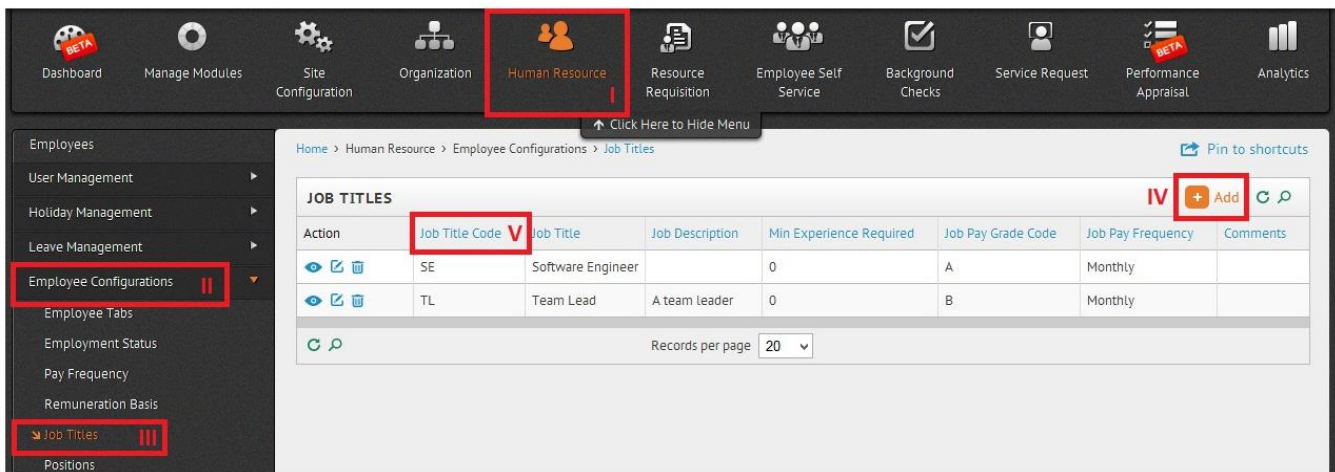
Note: You can only enter departments that are existing in the application

g. Enter the Reporting Manager employee id

h. Job Title

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

Refer Figure 77



Home > Human Resource > Employee Configurations > Job Titles

JOB TITLES IV + Add 🔄 🔍

Action	Job Title Code V	Job Title	Job Description	Min Experience Required	Job Pay Grade Code	Job Pay Frequency	Comments
View Edit Delete	SE	Software Engineer		0	A	Monthly	
View Edit Delete	TL	Team Lead	A team leader	0	B	Monthly	

Records per page 20

Figure 77

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

i. Position

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

Refer Figure 78

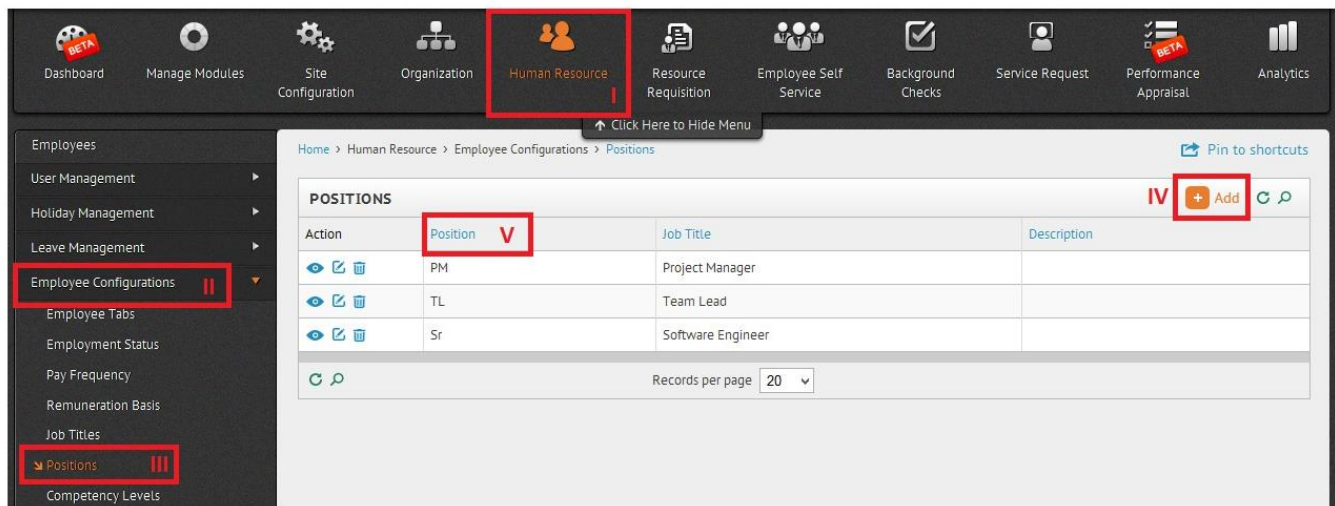


Figure 78

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

j. Employment Status

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

Refer Figure 79

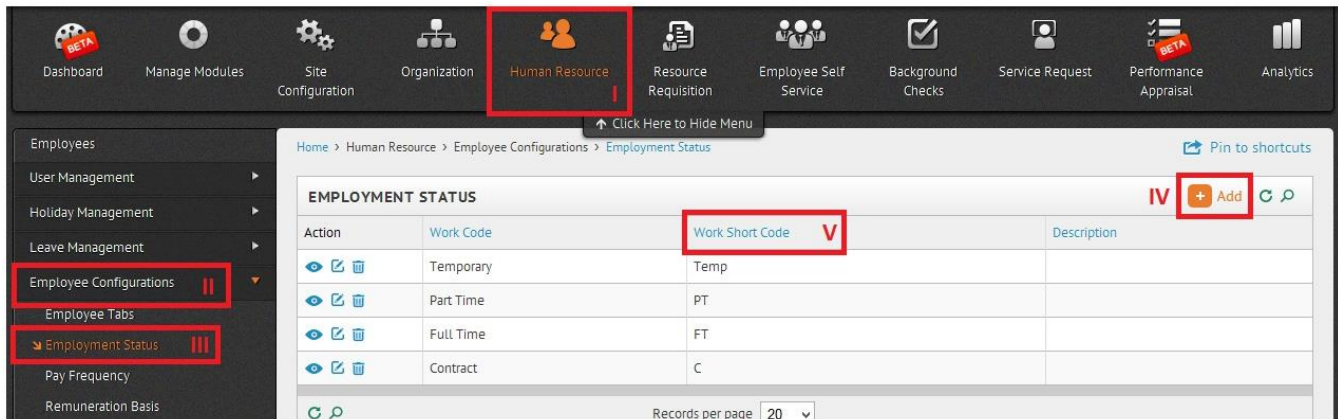


Figure 79

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

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

- I. This is a mandatory field

Refer Figure 80 for guidance

K	L	M
ent Status	Date of joining	Date of leaving
	20-12-2014	
	20-12-2014	

Figure 80

I. Enter the employee Date of Leaving

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

Refer Figure 81

K	L	M
Date of joining	Date of leaving	Experience

Figure 81

m. Enter the employee Experience

- I. This field is not mandatory

Refer Figure 82

L	M	N
Date of leaving	Experience	Extension

Figure 82

n. Enter the employee Extension

- I. This field is not mandatory

Refer Figure 83

M	N	
Experience	Extension	Work tele

Figure 83

o. Enter the employee Work Telephone Number

- I. This field is not mandatory

Refer Figure 84

N	O	P
Extension	Work telephone number	Fax

Figure 84

p. Enter the employee Fax

- I. This field is not mandatory

Refer Figure 85

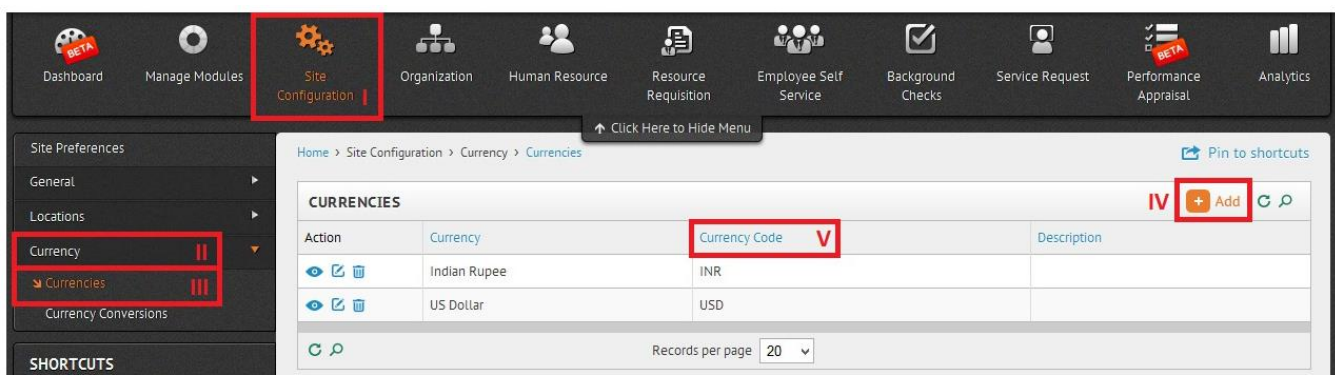
O	P	Q
Phone number	Fax	

Figure 85

q. Salary Currency

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

Refer Figure 86



The screenshot shows the Sentrifugo application interface. The top navigation bar includes 'Dashboard', 'Manage Modules', 'Site Configuration' (highlighted with a red box), 'Organization', 'Human Resource', 'Resource Requisition', 'Employee Self Service', 'Background Checks', 'Service Request', 'Performance Appraisal', and 'Analytics'. The left sidebar shows 'Site Preferences' with sub-items: 'General', 'Locations', 'Currency' (highlighted with a red box), 'Currencies' (highlighted with a red box), and 'Currency Conversions'. The main content area displays the 'CURRENCIES' table with columns: 'Action', 'Currency', 'Currency Code' (highlighted with a red box and labeled 'V'), and 'Description'. The table contains two rows: 'Indian Rupee' with code 'INR' and 'US Dollar' with code 'USD'. An 'Add' button (highlighted with a red box and labeled 'IV') is located at the top right of the table. The bottom of the table shows 'Records per page' set to '20'.

Figure 86

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

r. Pay Frequency

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

Refer Figure 87

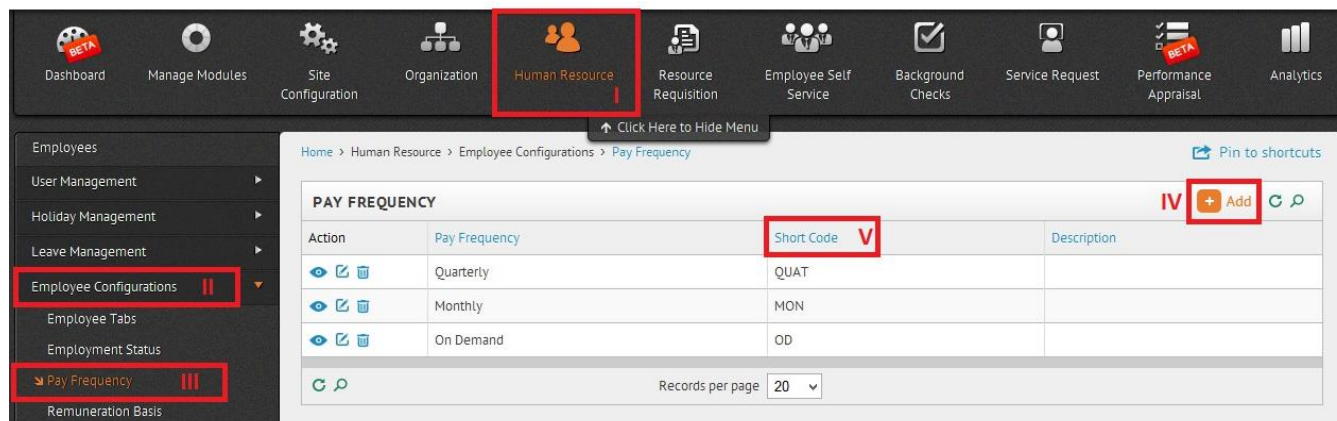


Figure 87

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

s. Enter the employee Salary

- I. This field is not mandatory

Refer Figure 88

S	T	U
Pay Frequency	Salary	

Figure 88

Performance Appraisal

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

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

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

Appraisal Settings

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

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

Refer Figure 89



Figure 89

In Add Appraisal Settings screen,

- Select an option in Business Unit dropdown
- Select the applicability
- Select the department based on the previous selections
- Select an option in Appraisal Mode dropdown
- Select an option in Appraisal Ratings dropdown
- Click on Save to save the Appraisal Settings

Refer Figure 90

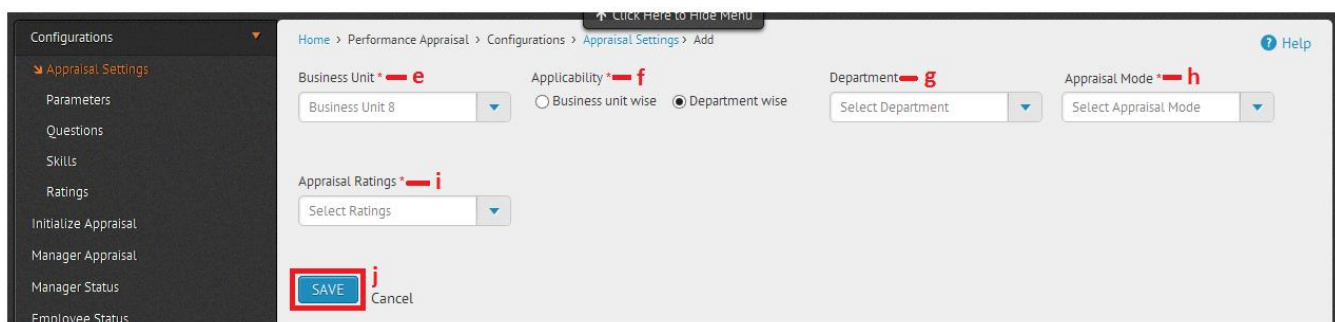


Figure 90

Parameters

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

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

Refer Figure 91

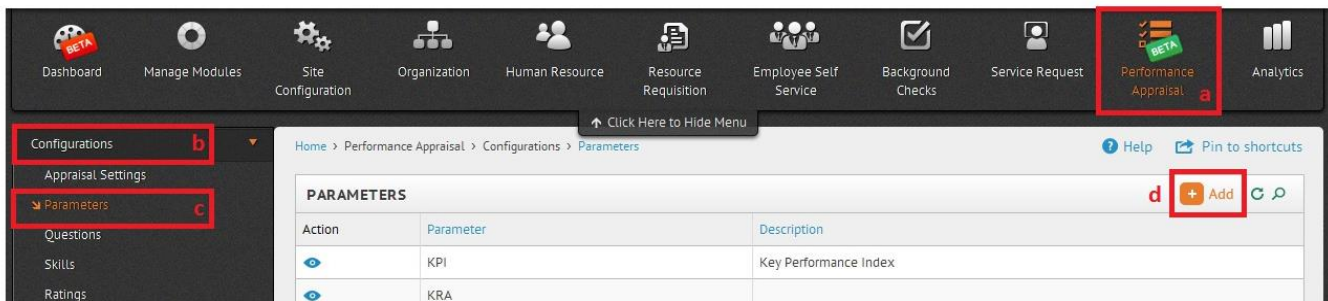


Figure 91

In the Add Parameters screen,

- Enter the parameter
- Provide description if necessary
- Click on Save to add the parameter

Refer Figure 92

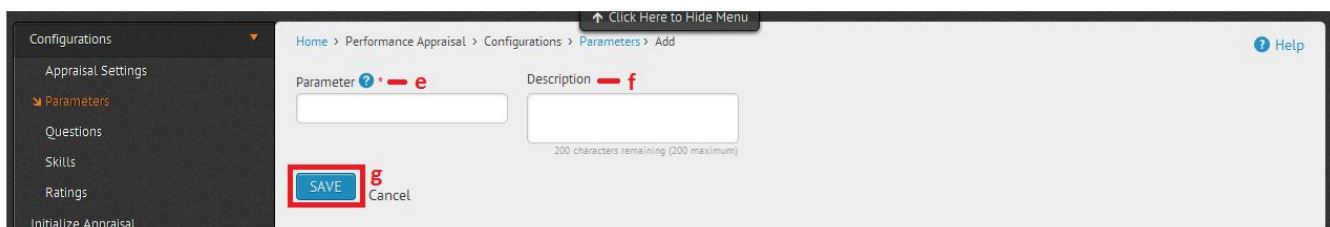


Figure 92

Questions

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

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

Refer Figure 93

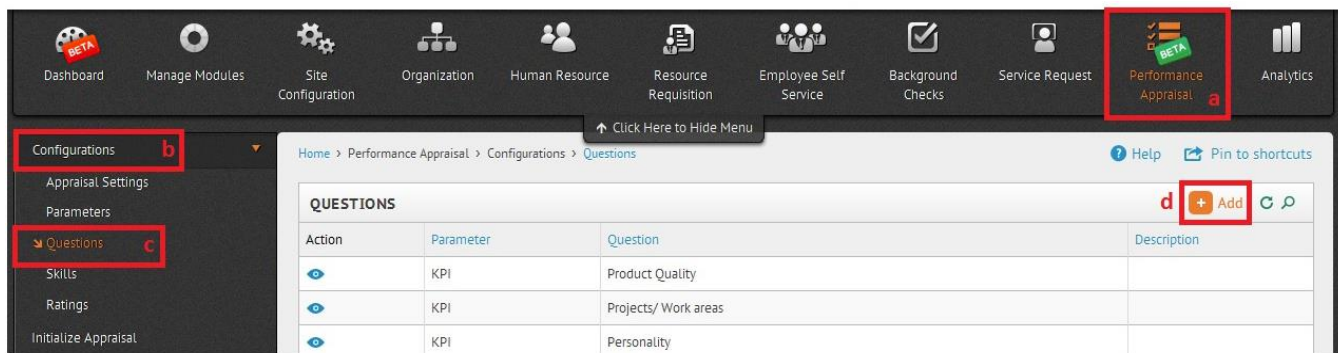


Figure 93

In the Add Questions screen,

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

Refer Figure 94

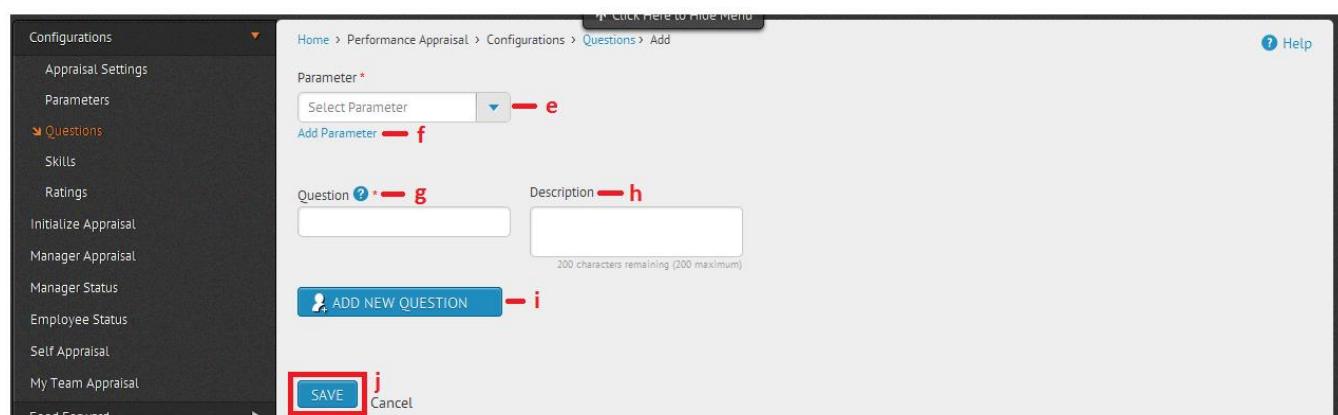


Figure 94

Skills

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

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

Refer Figure 95

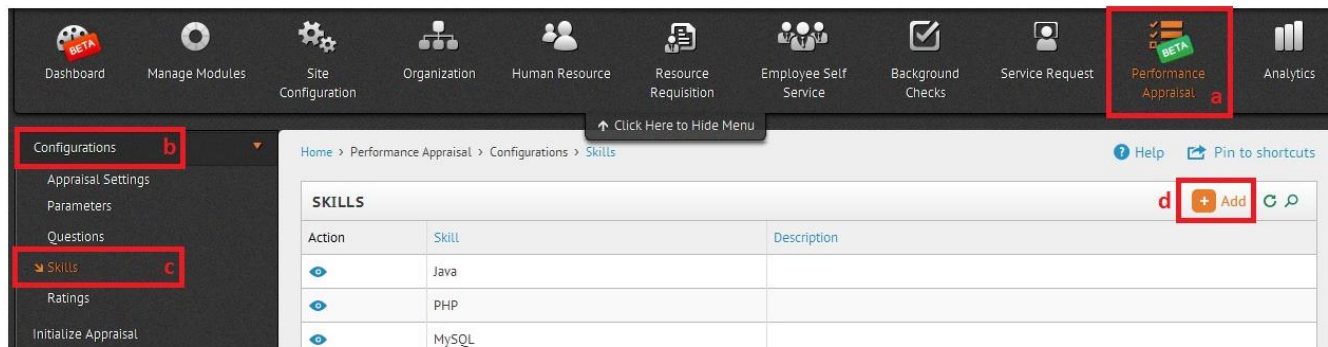


Figure 95

In the Add Skills screen,

- Enter the skill
- Provide description if necessary
- Click on Save to add the skill

Refer Figure 96

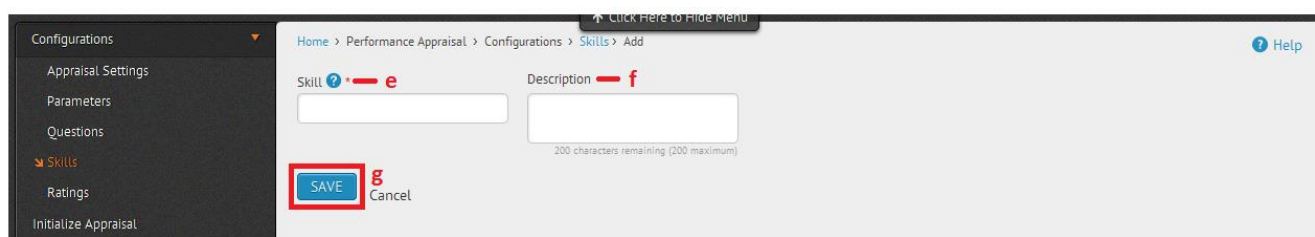


Figure 96

Ratings

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

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

Refer Figure 97

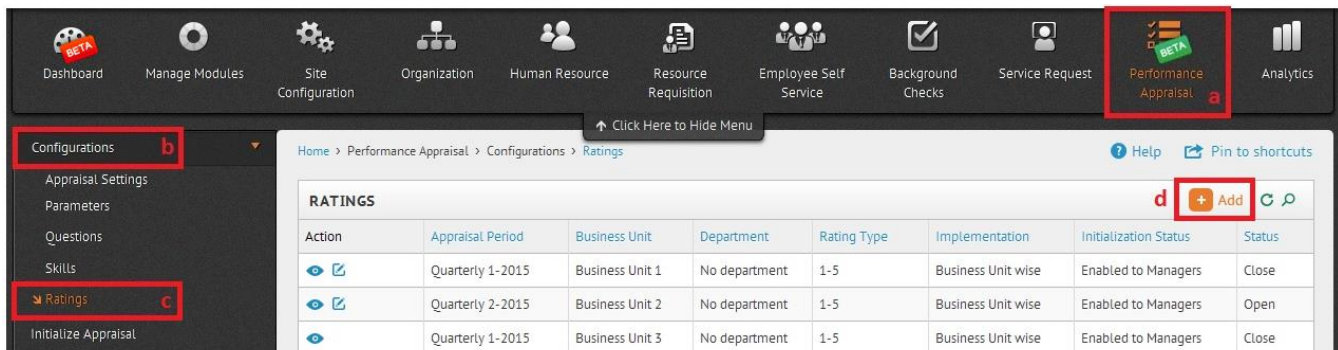


Figure 97

In the Add ratings screen,

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

Refer Figure 98

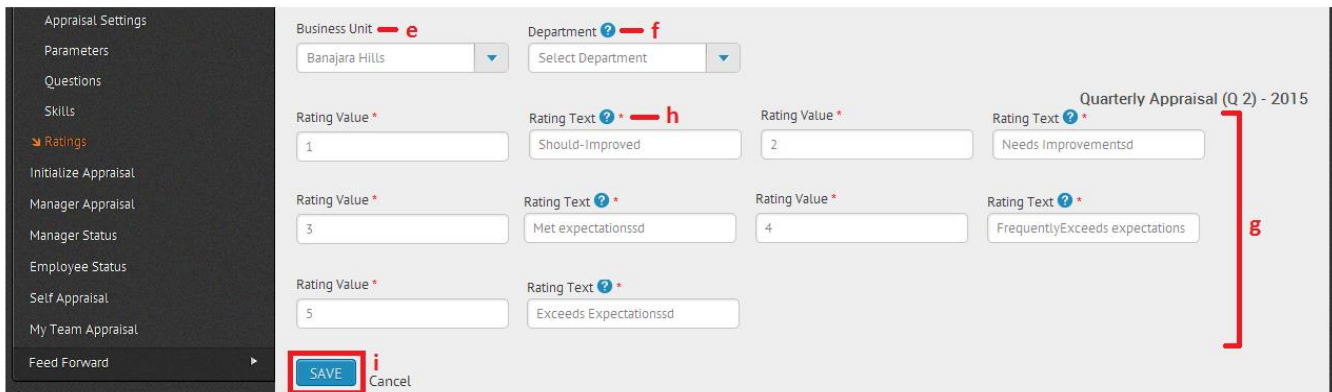


Figure 98

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

Initialize Appraisal

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

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

Refer Figure 99

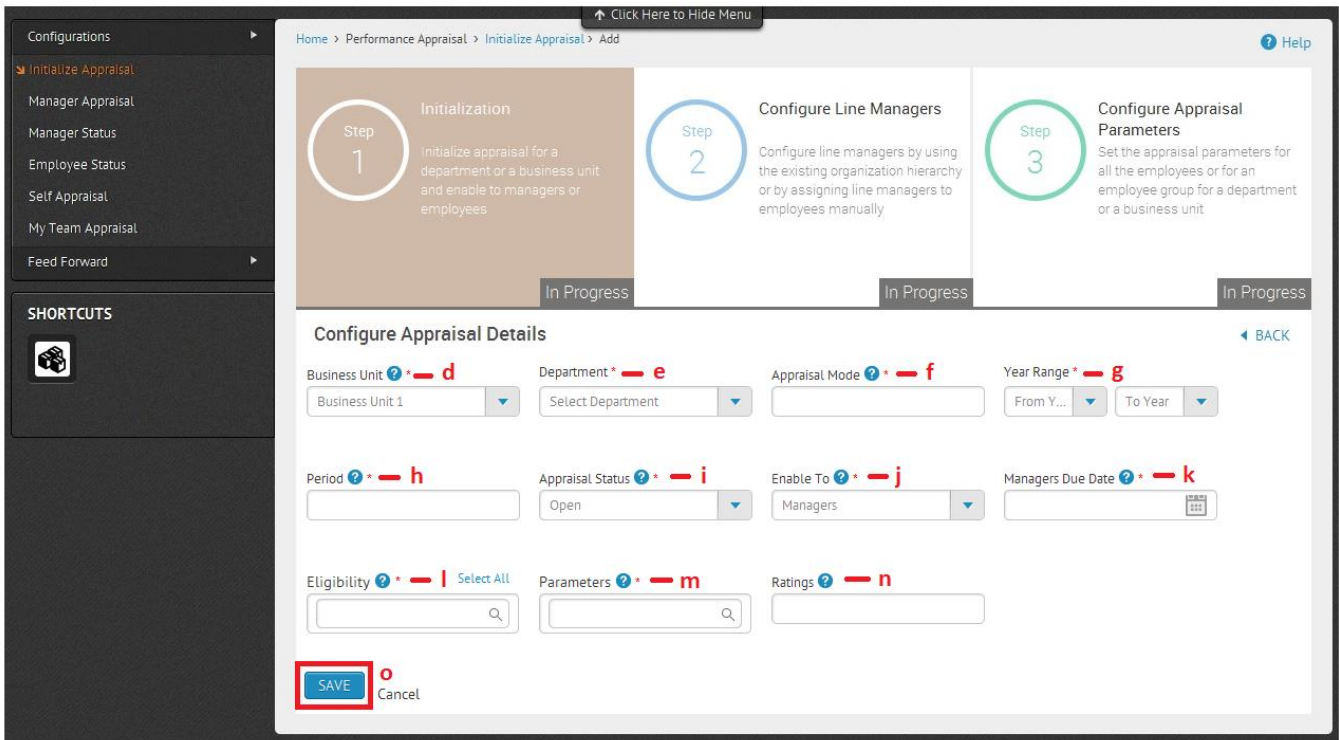


Figure 99

In the Add Initialize Appraisal screen,

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

Refer Figure 100



Home > Performance Appraisal > Initialize Appraisal > Add

Click Here to Hide Menu

Help

Step 1 Initialization
Initialize appraisal for a department or a business unit and enable to managers or employees
In Progress

Step 2 Configure Line Managers
Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually
In Progress

Step 3 Configure Appraisal Parameters
Set the appraisal parameters for all the employees or for an employee group for a department or a business unit
In Progress

Configure Appraisal Details [BACK](#)

Business Unit **d** Department **e** Appraisal Mode **f** Year Range **g**

Business Unit 1 Select Department From Y... To Year

Period **h** Appraisal Status **i** Enable To **j** Managers Due Date **k**

Open Managers

Eligibility **l** Select All Parameters **m** Ratings **n**

SAVE Cancel

Figure 100

Configure Line Managers

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

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

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

Refer Figure 101

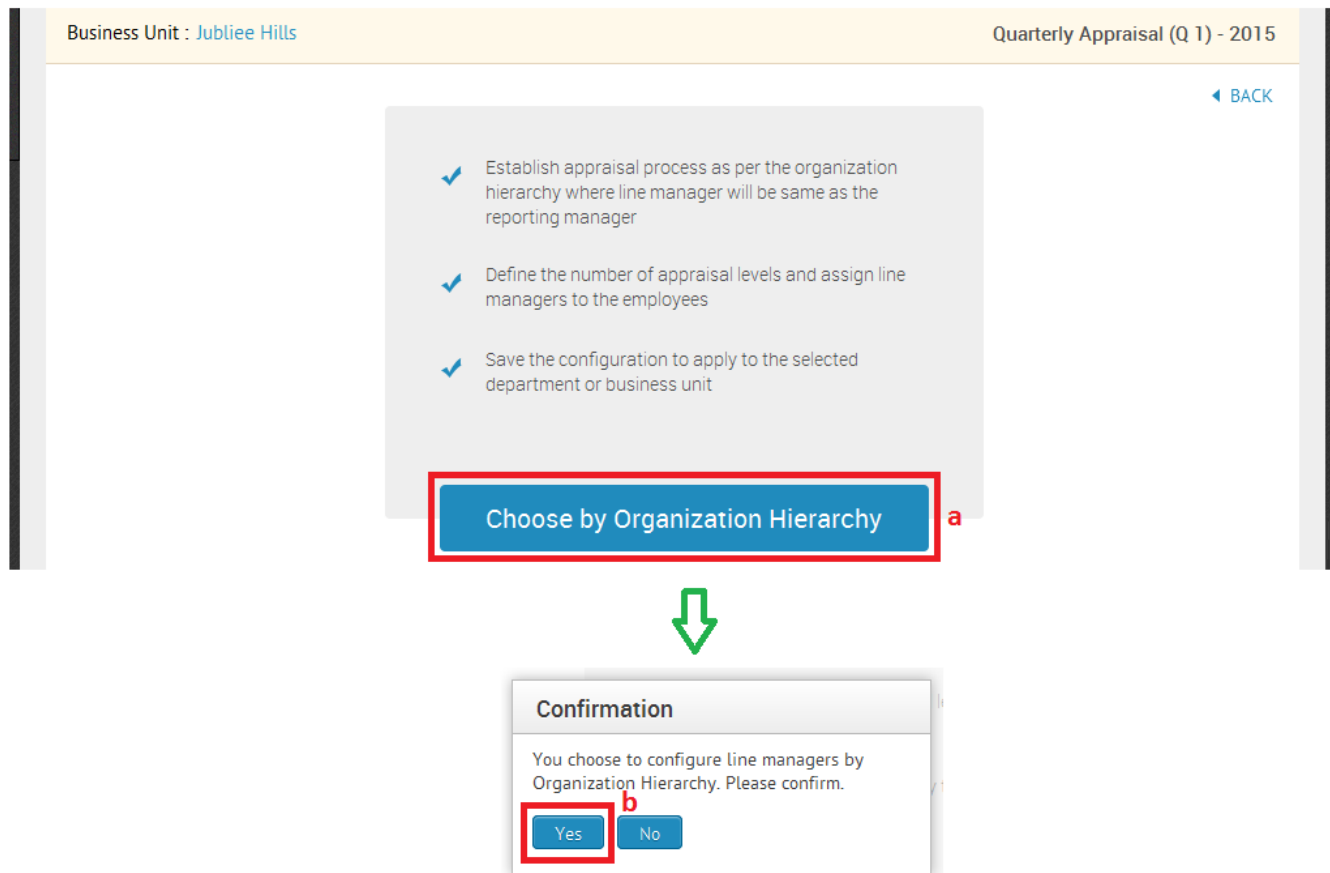
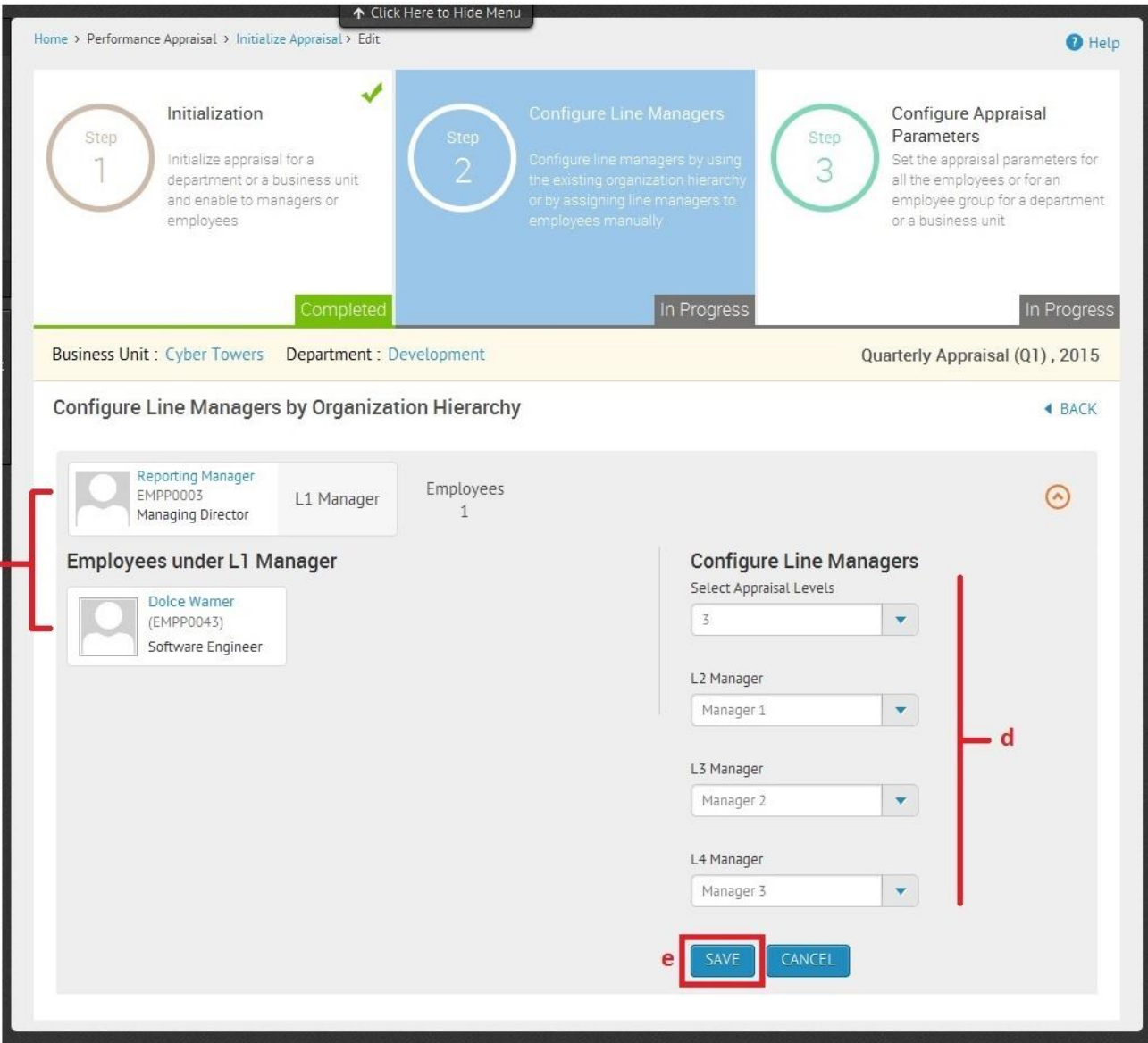


Figure 101

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

Refer Figure 102



Home > Performance Appraisal > Initialize Appraisal > Edit

Help

Step 1 Initialization
Initialize appraisal for a department or a business unit and enable to managers or employees
Completed

Step 2 Configure Line Managers
Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually
In Progress

Step 3 Configure Appraisal Parameters
Set the appraisal parameters for all the employees or for an employee group for a department or a business unit
In Progress

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

Configure Line Managers by Organization Hierarchy BACK

Reporting Manager
EMPP0003
Managing Director L1 Manager Employees
1

Employees under L1 Manager

Dolce Warner
(EMPP0043)
Software Engineer

Configure Line Managers

Select Appraisal Levels
3

L2 Manager
Manager 1

L3 Manager
Manager 2

L4 Manager
Manager 3

SAVE CANCEL

Figure 102

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

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

Refer Figure 103

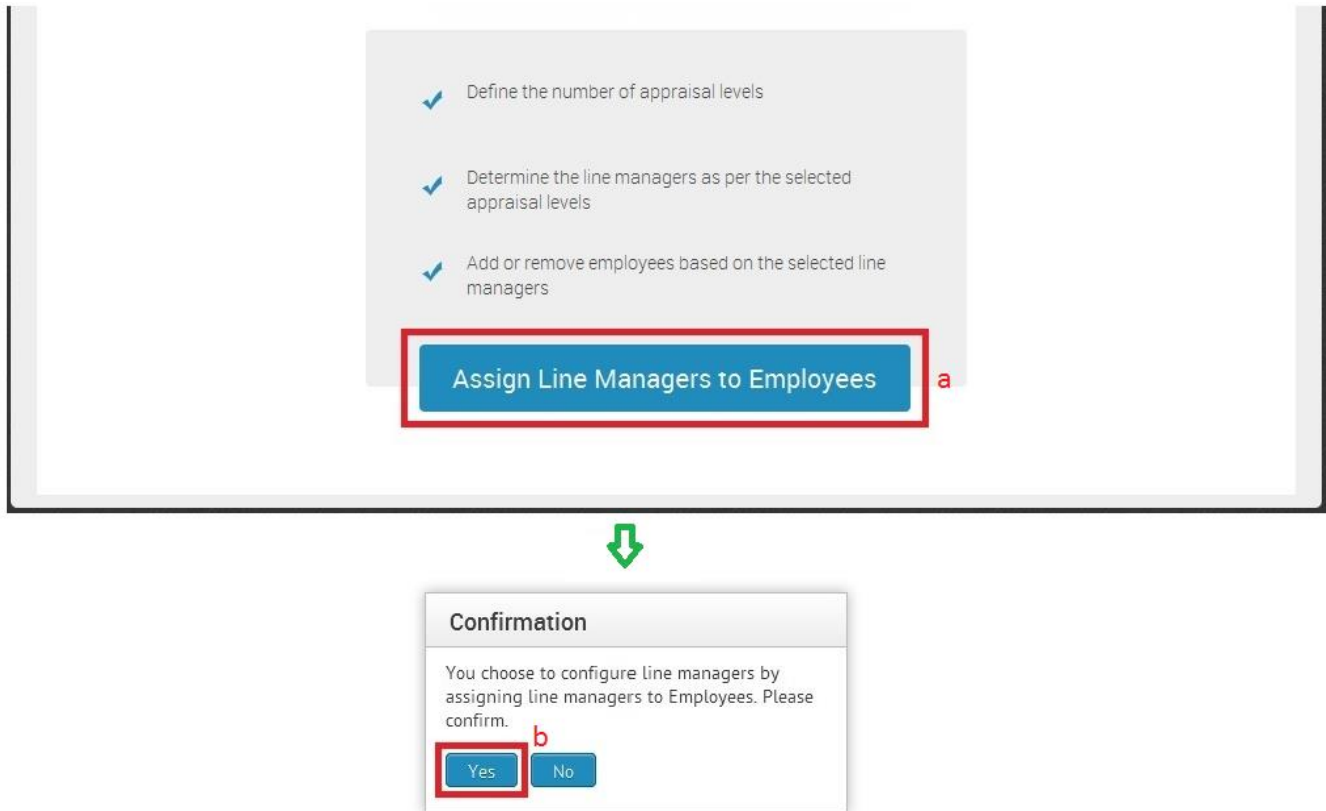
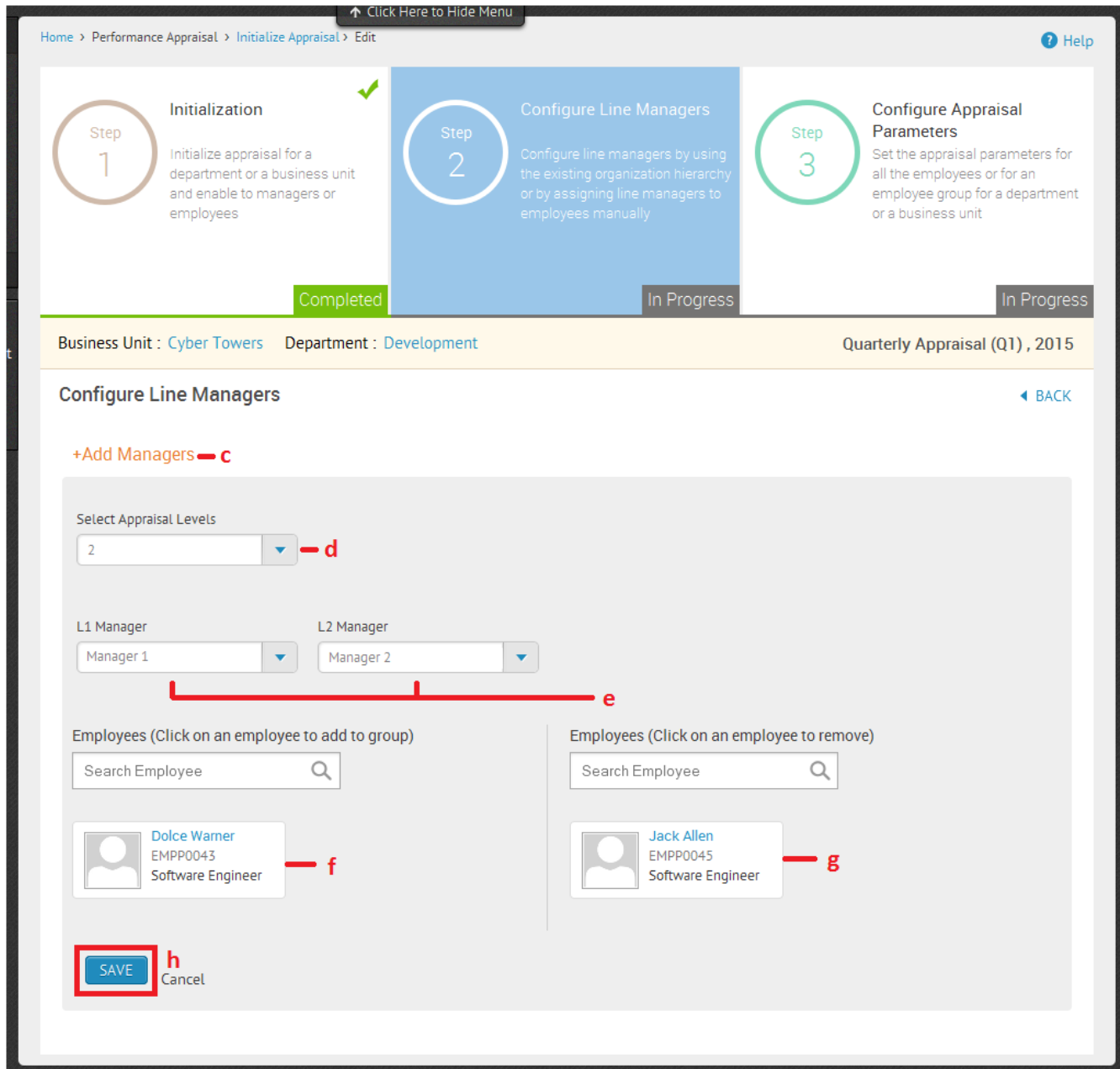


Figure 103

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

Refer Figure 104



Home > Performance Appraisal > Initialize Appraisal > Edit

Click Here to Hide Menu

Help

Step 1 Initialization Completed
 Initialize appraisal for a department or a business unit and enable to managers or employees

Step 2 Configure Line Managers In Progress
 Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually

Step 3 Configure Appraisal Parameters In Progress
 Set the appraisal parameters for all the employees or for an employee group for a department or a business unit

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

Configure Line Managers [BACK](#)

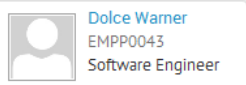
[+Add Managers](#) — c

Select Appraisal Levels
 2 — d

L1 Manager L2 Manager
 Manager 1 Manager 2 — e

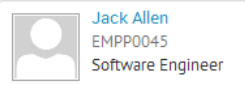
Employees (Click on an employee to add to group)

Search Employee

 — f

Employees (Click on an employee to remove)

Search Employee

 — g

SAVE h Cancel

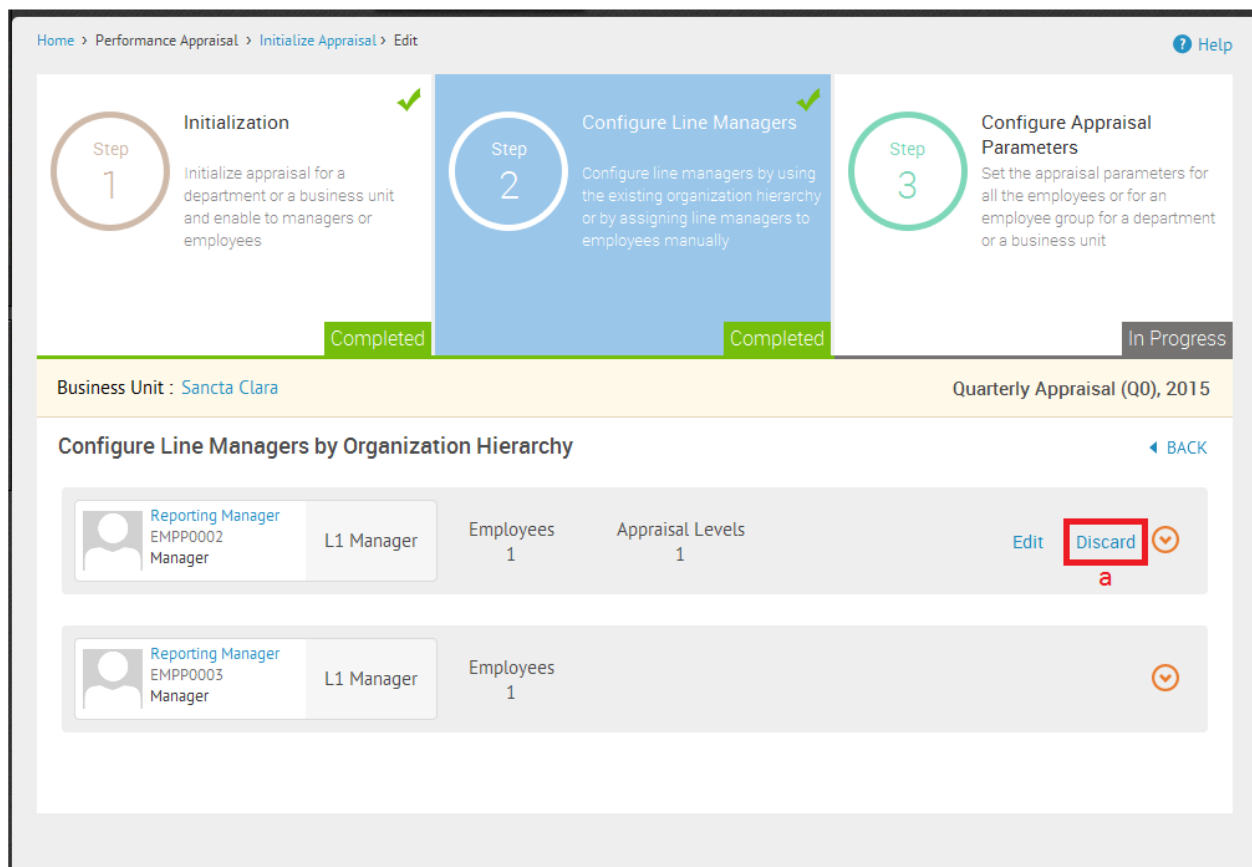
Figure 104

Discard Line Manager Configuration

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

- a. Click on Discard to discard the line manager configurations

Refer Figure 105



OR

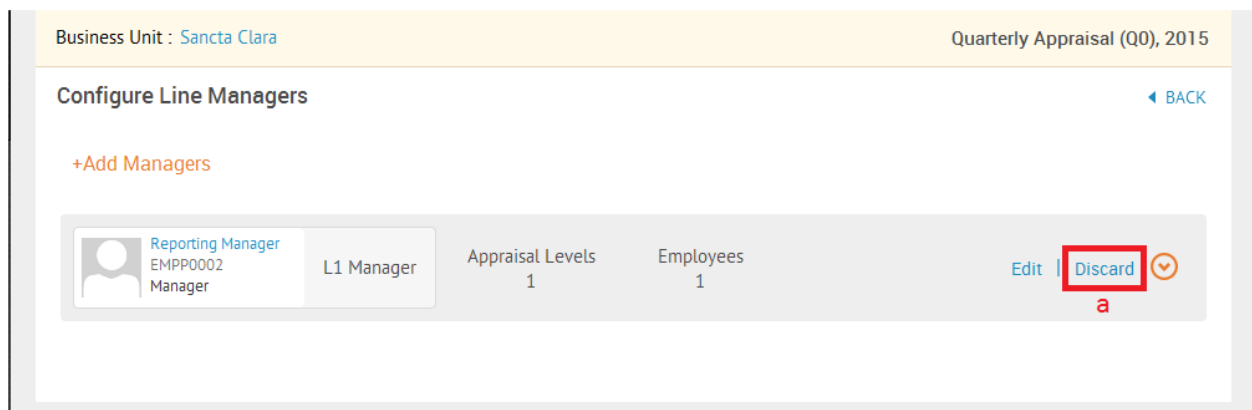


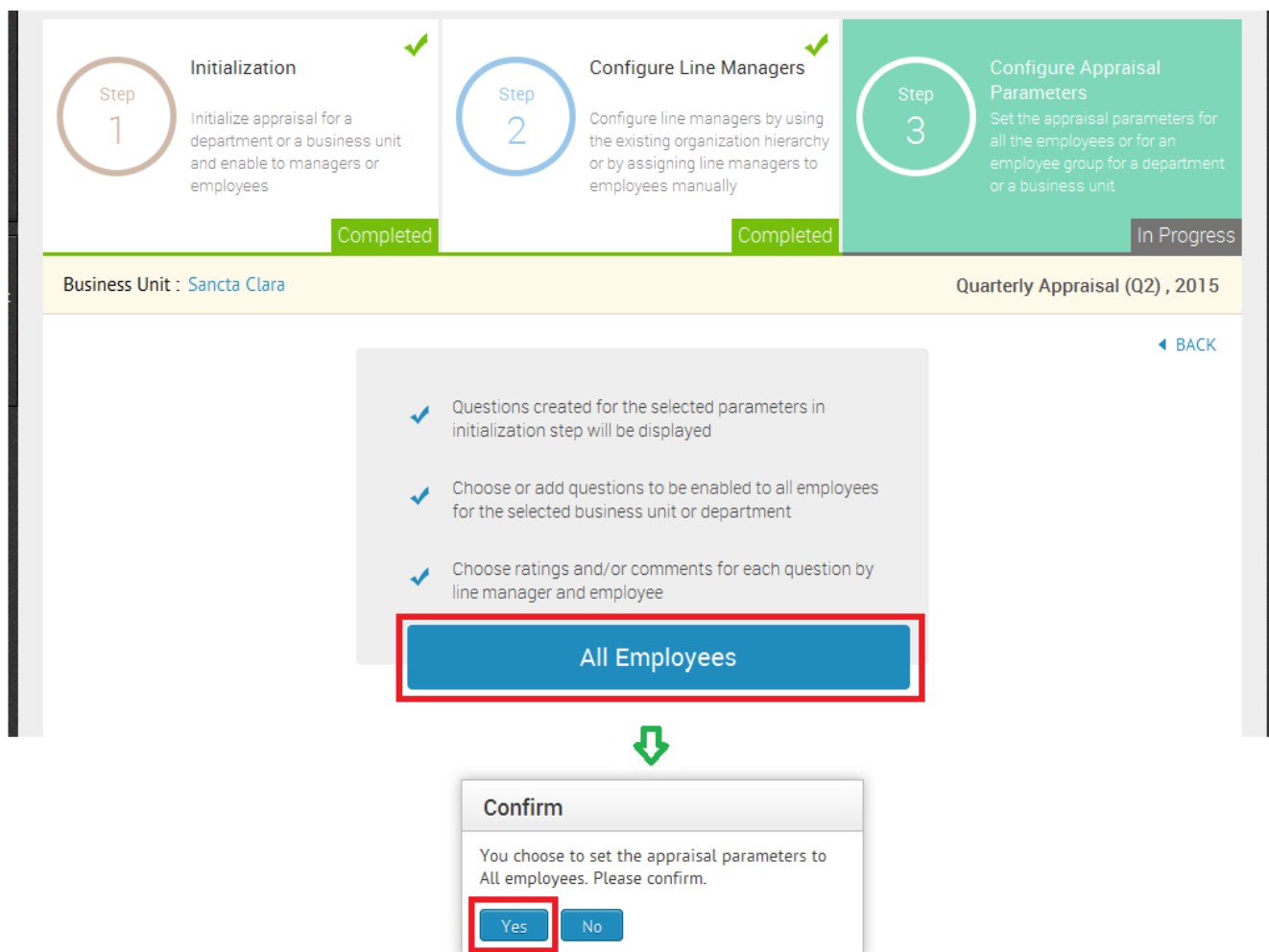
Figure 105

Configure Appraisal Parameters

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

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

Refer Figure 106



Step 1 Initialization Completed
 Initialize appraisal for a department or a business unit and enable to managers or employees

Step 2 Configure Line Managers Completed
 Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually

Step 3 Configure Appraisal Parameters In Progress
 Set the appraisal parameters for all the employees or for an employee group for a department or a business unit

Business Unit : [Sancta Clara](#) Quarterly Appraisal (Q2) , 2015 [BACK](#)

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

All Employees

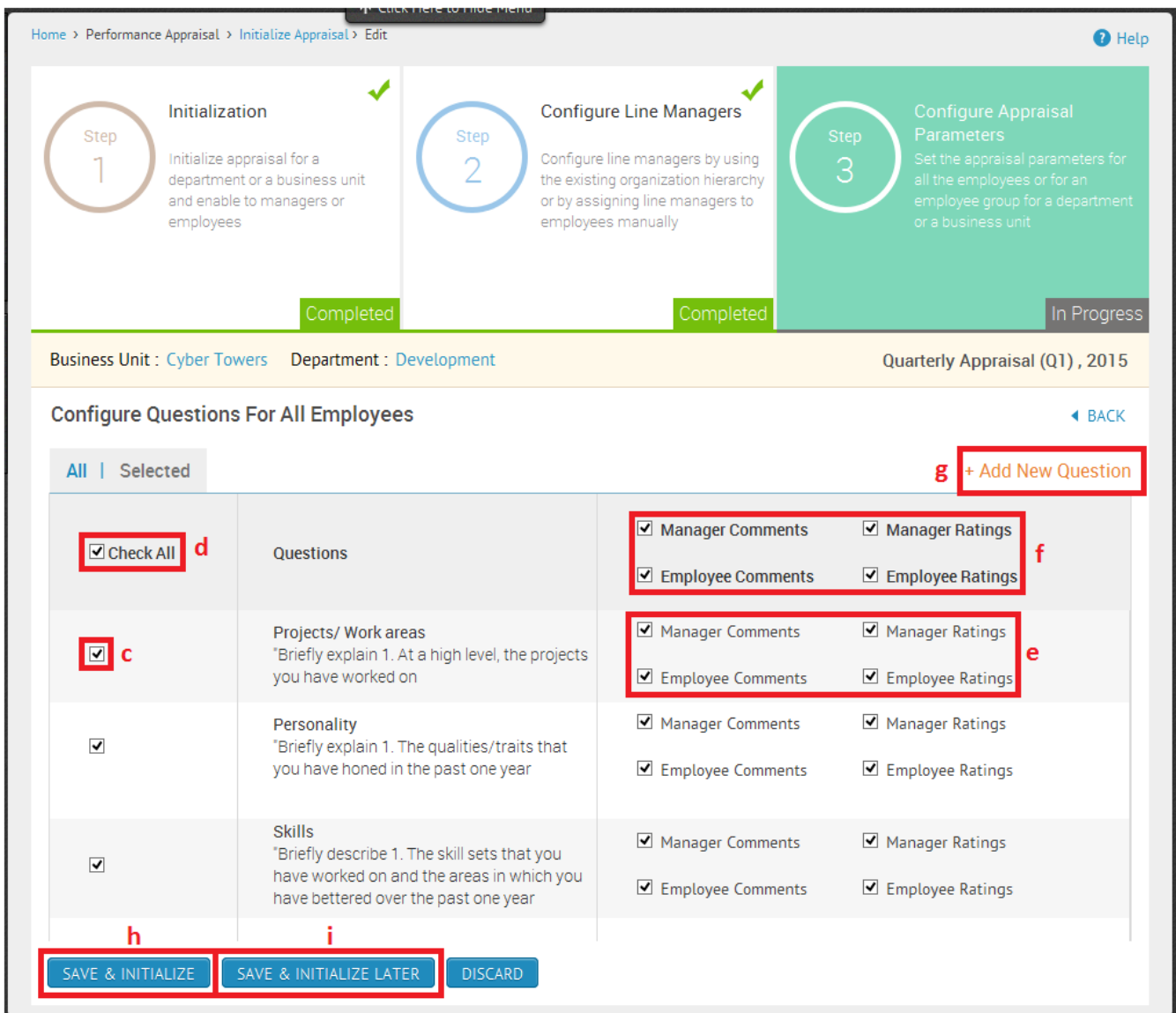
Confirm
 You choose to set the appraisal parameters to All employees. Please confirm.

Yes **No**

Figure 106

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

Refer Figure 107



Home > Performance Appraisal > Initialize Appraisal > Edit

Help

Step 1

Initialization

Initialize appraisal for a department or a business unit and enable to managers or employees

Completed

Step 2

Configure Line Managers

Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually

Completed

Step 3

Configure Appraisal Parameters

Set the appraisal parameters for all the employees or for an employee group for a department or a business unit

In Progress

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

Configure Questions For All Employees BACK

All | Selected **g** + Add New Question

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

h **i**

SAVE & INITIALIZE SAVE & INITIALIZE LATER DISCARD

Figure 107

2. Customized Employee Groups

- Apply appraisal parameters by grouping employees
- Choose or add questions to be enabled to all employees for the selected business unit or department
- Choose ratings and/or comments for each question by line manager and employee

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

Refer Figure 108

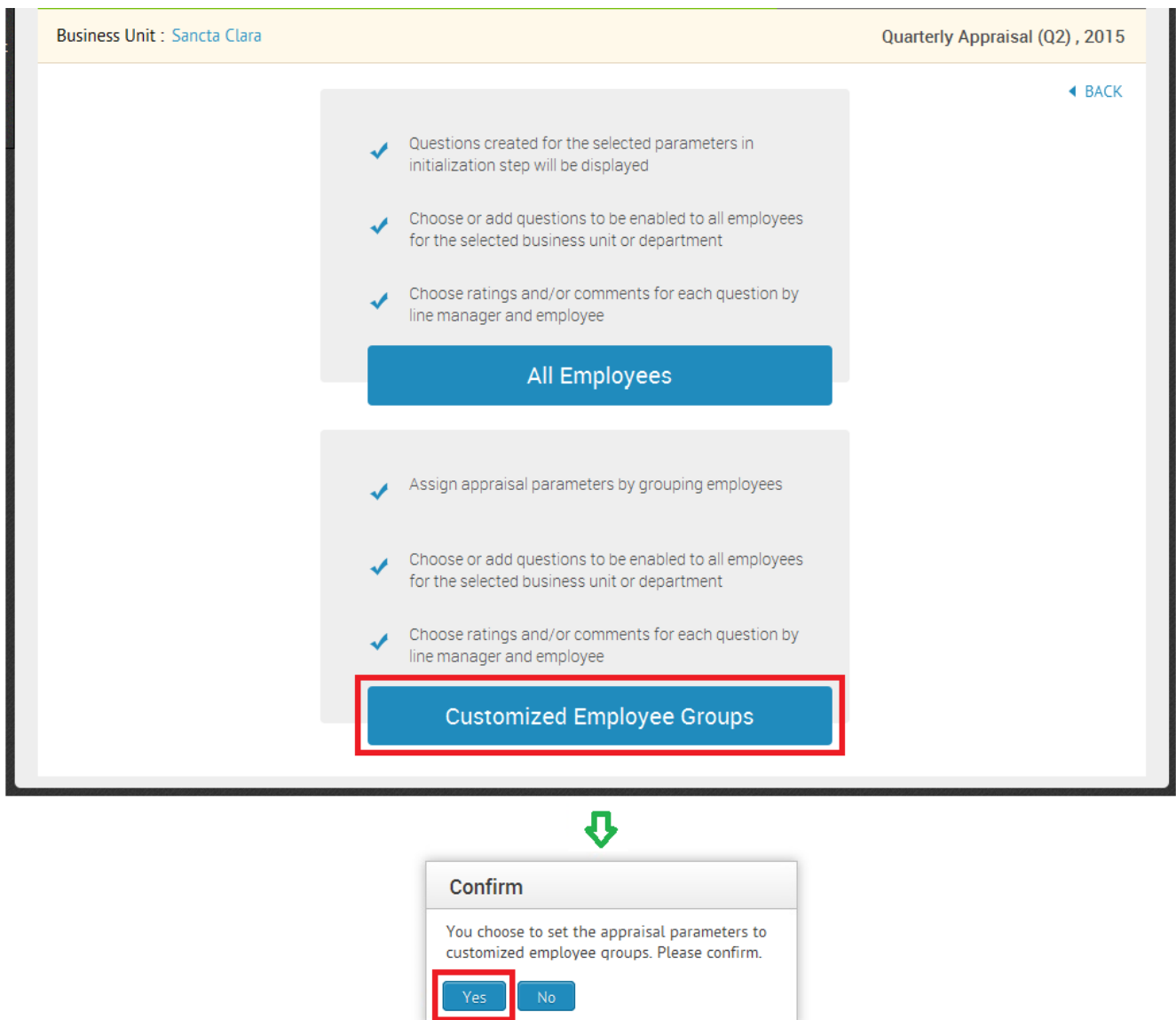


Figure 108

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

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

Refer Figure 109

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

Customized Employee Groups ◀ BACK

CREATE NEW GROUP
DISCARD

Group Name * — d

Employees

Search Employee 🔍

Dolce Warner
(EMPP0043)
Software Engineer

Selected Employees (0)

Search Employee 🔍

Add employees to group.

All | Selected
+ Add New Question j

	Questions	
<div style="border: 2px solid red; padding: 2px 5px; display: inline-block;"> <input checked="" type="checkbox"/> Check All g </div>		<div style="display: flex; justify-content: space-between;"> <div style="border: 2px solid red; padding: 2px 5px; display: inline-block;"> <input checked="" type="checkbox"/> Manager Comments </div> <div style="border: 2px solid red; padding: 2px 5px; display: inline-block;"> <input checked="" type="checkbox"/> Manager Ratings i </div> </div> <div style="display: flex; justify-content: space-between;"> <div style="border: 2px solid red; padding: 2px 5px; display: inline-block;"> <input checked="" type="checkbox"/> Employee Comments </div> <div style="border: 2px solid red; padding: 2px 5px; display: inline-block;"> <input checked="" type="checkbox"/> Employee Ratings </div> </div>
<div style="border: 2px solid red; padding: 2px 5px; display: inline-block;"> <input checked="" type="checkbox"/> f </div>	<p>Projects/ Work areas</p> <p>*Briefly explain 1. At a high level, the projects you have worked on</p>	<div style="display: flex; justify-content: space-between;"> <div style="border: 2px solid red; padding: 2px 5px; display: inline-block;"> <input checked="" type="checkbox"/> Manager Comments </div> <div style="border: 2px solid red; padding: 2px 5px; display: inline-block;"> <input checked="" type="checkbox"/> Manager Ratings h </div> </div> <div style="display: flex; justify-content: space-between;"> <div style="border: 2px solid red; padding: 2px 5px; display: inline-block;"> <input checked="" type="checkbox"/> Employee Comments </div> <div style="border: 2px solid red; padding: 2px 5px; display: inline-block;"> <input checked="" type="checkbox"/> Employee Ratings </div> </div>
<input checked="" type="checkbox"/>	<p>Personality</p> <p>*Briefly explain 1. The qualities/traits that you have honed in the past one year</p>	<div style="display: flex; justify-content: space-between;"> <div><input checked="" type="checkbox"/> Manager Comments</div> <div><input checked="" type="checkbox"/> Manager Ratings</div> </div> <div style="display: flex; justify-content: space-between;"> <div><input checked="" type="checkbox"/> Employee Comments</div> <div><input checked="" type="checkbox"/> Employee Ratings</div> </div>
<input checked="" type="checkbox"/>	<p>Skills</p> <p>*Briefly describe 1. The skill sets that you have worked on and the areas in which you have bettered over the past one year</p>	<div style="display: flex; justify-content: space-between;"> <div><input checked="" type="checkbox"/> Manager Comments</div> <div><input checked="" type="checkbox"/> Manager Ratings</div> </div> <div style="display: flex; justify-content: space-between;"> <div><input checked="" type="checkbox"/> Employee Comments</div> <div><input checked="" type="checkbox"/> Employee Ratings</div> </div>

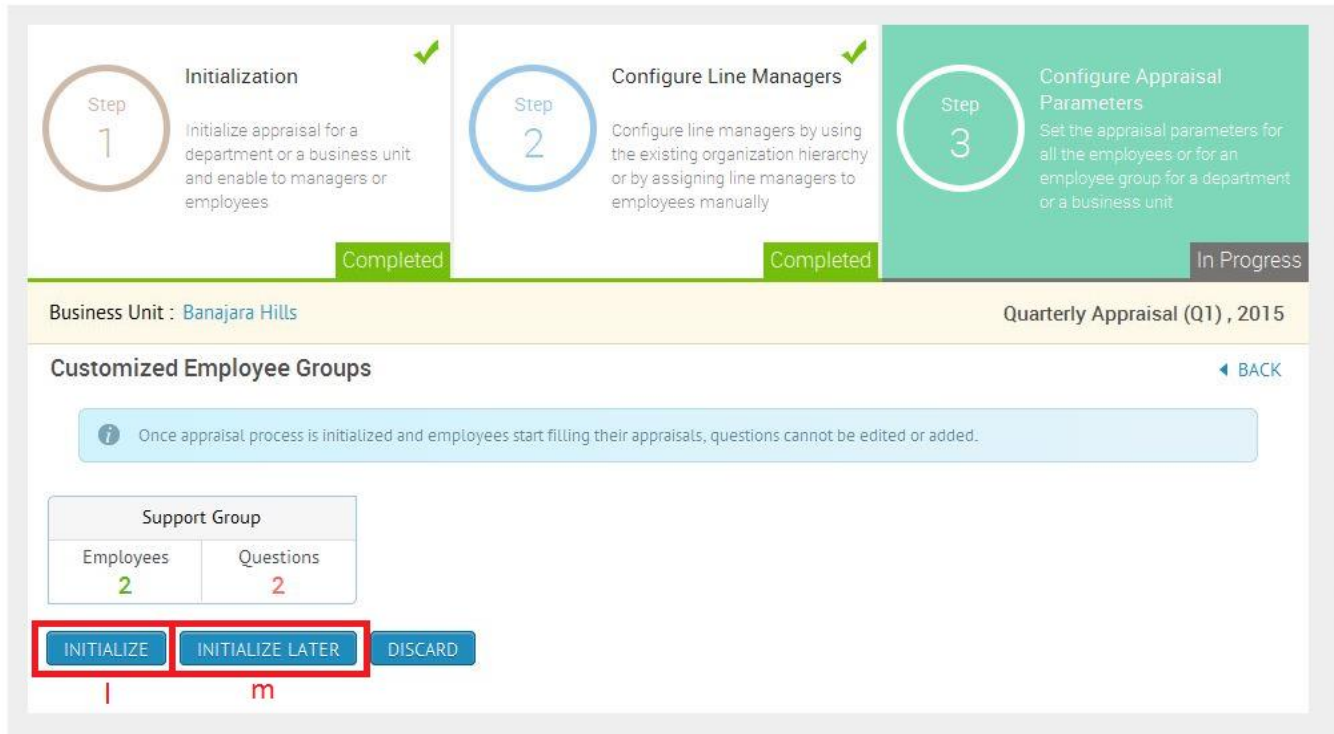
SAVE

k Close

Figure 109

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

Refer Figure 110



Step 1 Initialization Completed

Initialize appraisal for a department or a business unit and enable to managers or employees

Step 2 Configure Line Managers Completed

Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually

Step 3 Configure Appraisal Parameters In Progress

Set the appraisal parameters for all the employees or for an employee group for a department or a business unit

Business Unit : Banajara Hills Quarterly Appraisal (Q1) , 2015

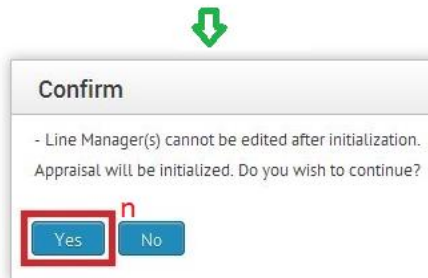
Customized Employee Groups BACK

Once appraisal process is initialized and employees start filling their appraisals, questions cannot be edited or added.

Support Group	
Employees	Questions
2	2

INITIALIZE **INITIALIZE LATER** **DISCARD**

l m



Confirm

- Line Manager(s) cannot be edited after initialization.
Appraisal will be initialized. Do you wish to continue?

Yes **No**

n

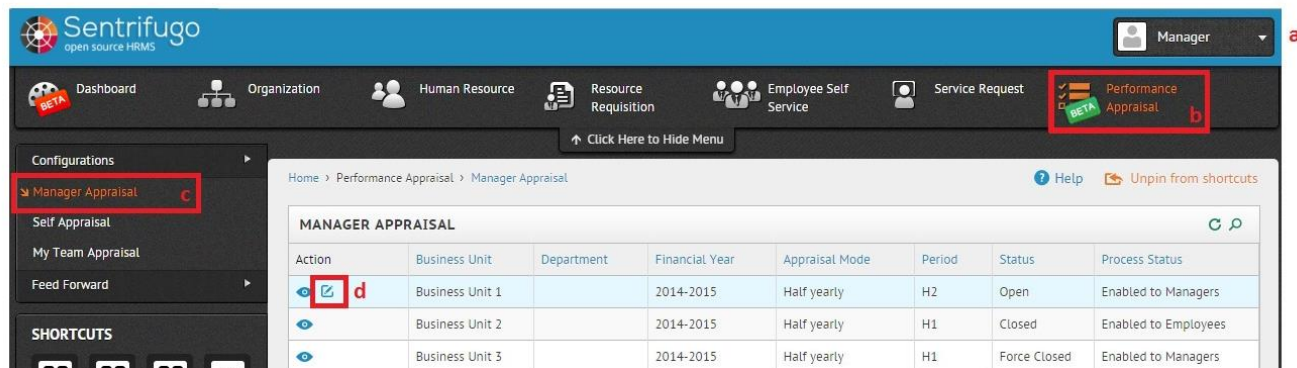
Figure 110

Manager Appraisal

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

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

Refer Figure 111



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

Refer Figure 112

Initialization Details

[BACK](#)

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

Group Details

[CREATE NEW GROUP](#)
[SUBMIT INITIALIZATION](#)

Group Name *

Employees

Selected Employees (0)

Employee 1
(EMPP0029)
Software Engineer

Employee 8
(EMPP0029)
Software Engineer

Configure Appraisal Parameters for All Employees

[All](#) | [Selected](#)

[+ Add New Question](#)

<input checked="" type="checkbox"/> Check All	Questions	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings
<input checked="" type="checkbox"/>	New Technologies/skills learn and implemented What are the new technologies/skills you explored and implemented?	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings
<input checked="" type="checkbox"/>	Responsibility Have you taken complete ownership of the task/project/product assigned to you?	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings

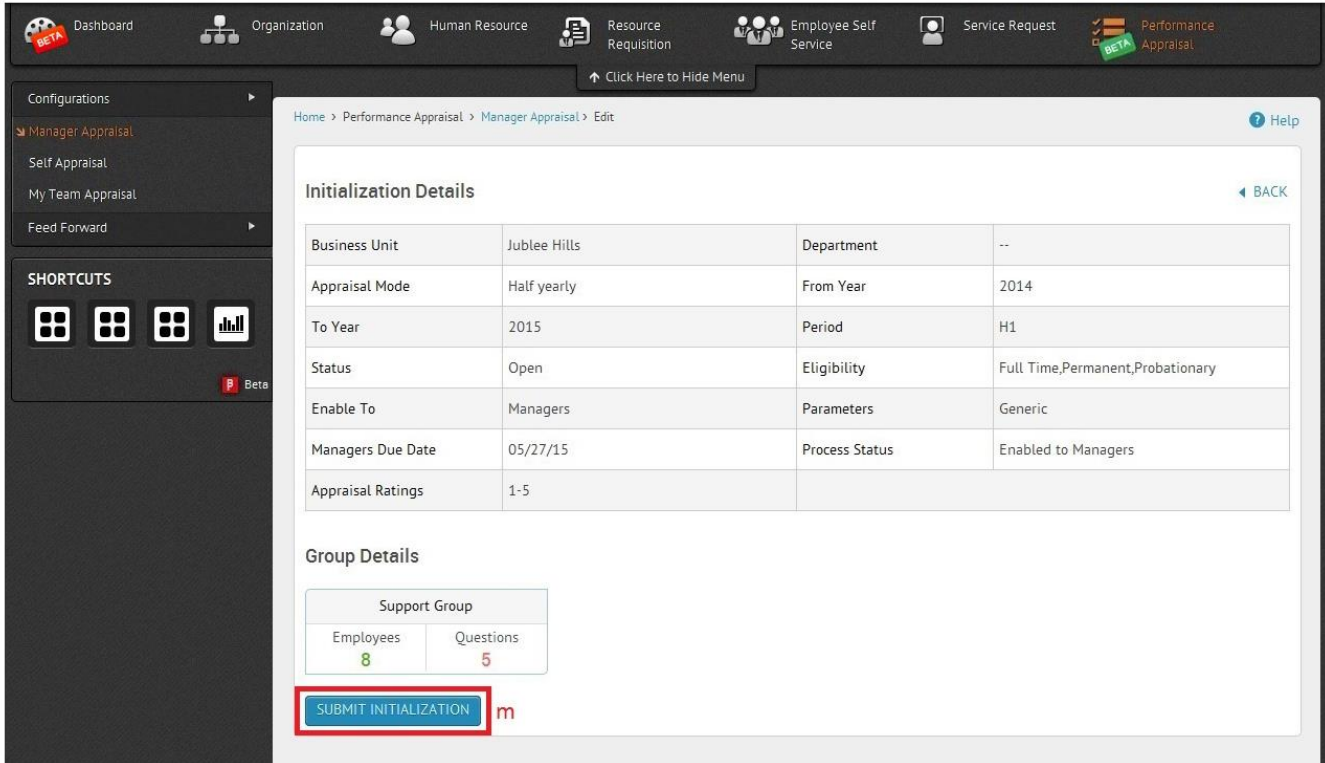
[SAVE](#) | Close

Figure 112

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

- m. Click on Submit Initialization

Refer Figure 113



The screenshot shows the 'Manager Appraisal' page in Sentrifugo. The left sidebar contains 'Configurations' with 'Manager Appraisal' selected, and 'SHORTCUTS' with a 'BETA' badge. The main content area is titled 'Initialization Details' and contains a table with appraisal parameters. Below the table is a 'Group Details' section showing 'Support Group' with 8 employees and 5 questions. At the bottom, a red box highlights the 'SUBMIT INITIALIZATION' button, with a red 'm' next to it.

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

Group Details

Support Group	
Employees	Questions
8	5

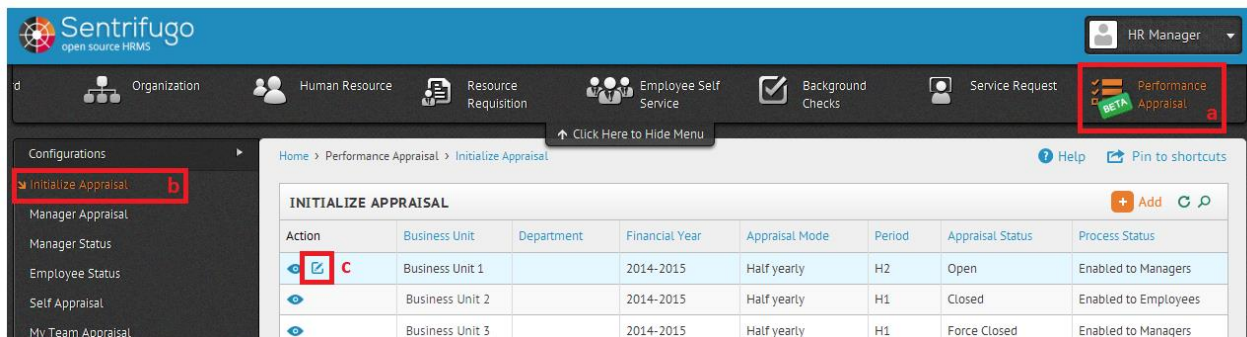
SUBMIT INITIALIZATION m

Figure 113

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

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

Refer Figure 114



The screenshot shows the 'Initialize Appraisal' page in Sentrifugo. The left sidebar contains 'Configurations' with 'Initialize Appraisal' selected. The main content area is titled 'INITIALIZE APPRAISAL' and contains a table with appraisal processes. A red box highlights the 'Performance Appraisal' link in the top right, and another red box highlights the 'Initialize Appraisal' link in the left sidebar. A third red box highlights the edit icon (pencil) in the first row of the table.




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

Figure 114

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

Refer Figure 115

Step
1

Initialization ✓

Initialize appraisal for a department or a business unit and enable to managers or employees

Completed

Step
2

Configure Line Managers ✓

Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually

Completed



Step
3

Configure Appraisal Parameters ✓

Set the appraisal parameters for all the employees or for an employee group for a department or a business unit

Completed

Appraisal Details ◀ BACK

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

UPDATE

f
Cancel

Figure 115

Manager Status

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

- Click on Performance Appraisal in the header
- Click on Manager Status in the left side menu
- Select the Business Unit
- Select the Department
- Select the Manager Appraisal Status if required
- Managers and their status will be displayed

Refer Figure 116

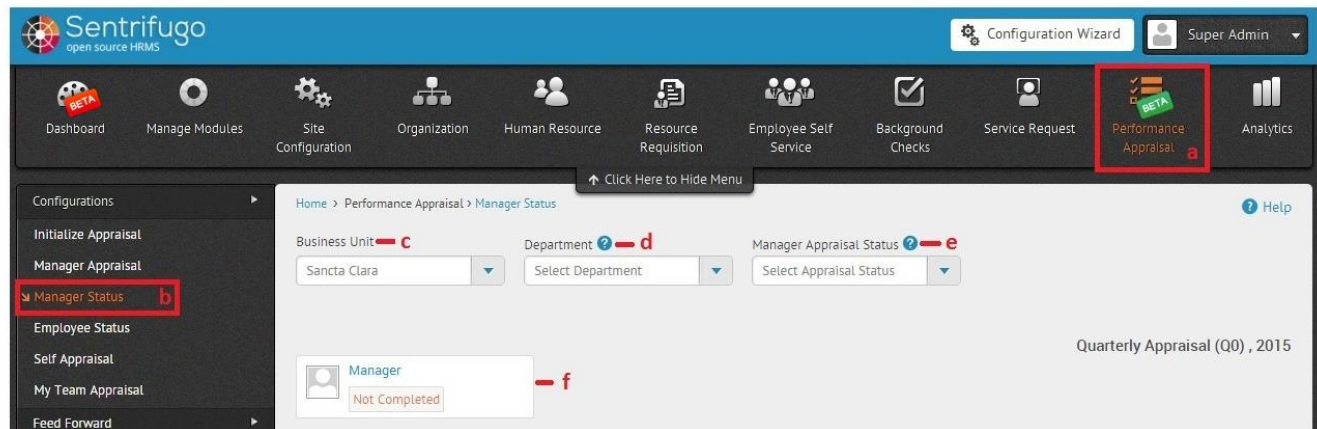


Figure 116

Employee Status

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

- Click on Performance Appraisal in the header
- Click on Employee Status in the left side menu
- Select the Business Unit
- Select the Department
- Select Appraisal Status if required
- Employees and their appraisal status will be displayed

Refer Figure 117

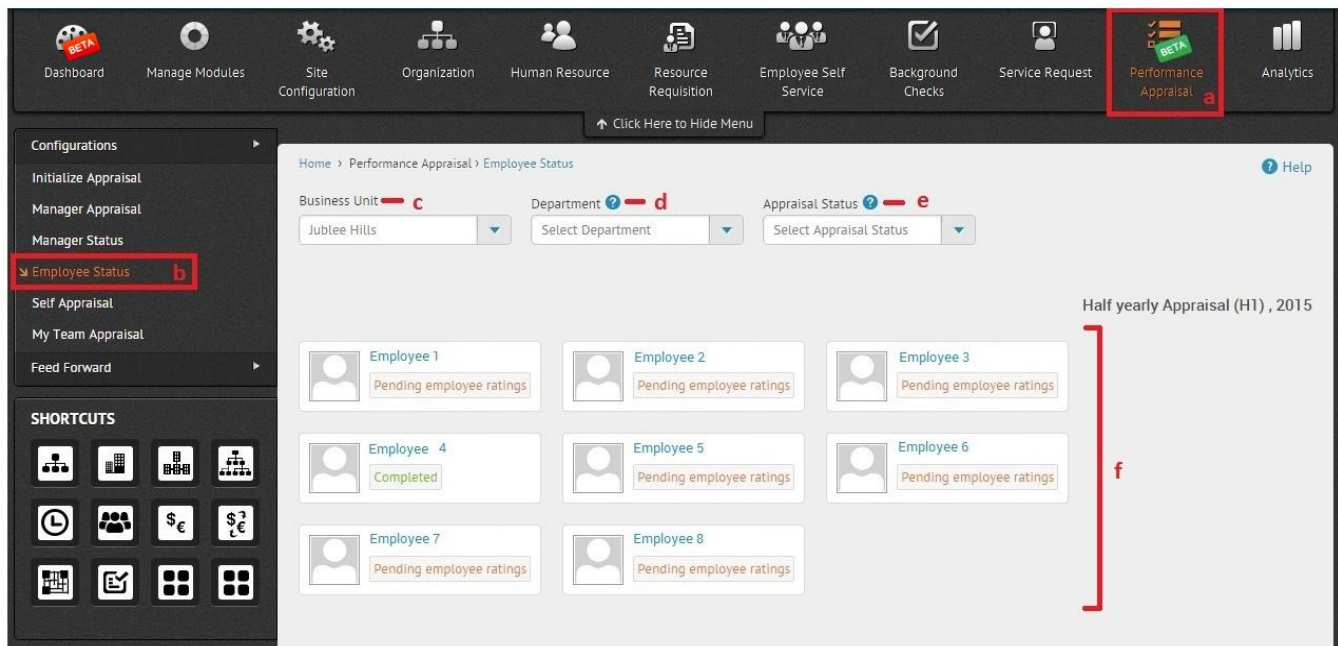


Figure 117

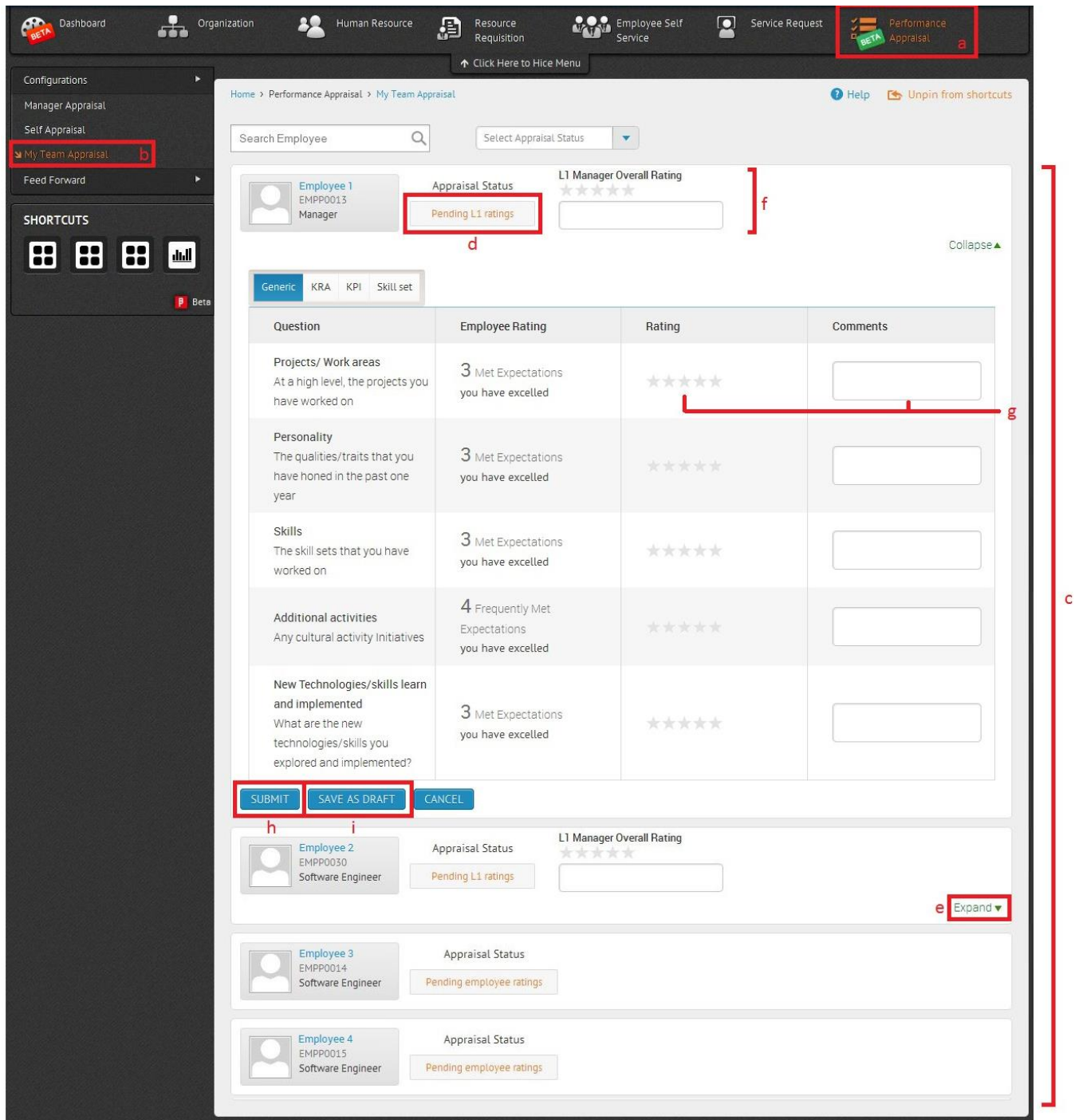
My Team Appraisal

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

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

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

Refer Figure 118



Dashboard Organization Human Resource Resource Requisition Employee Self Service Service Request Performance Appraisal **a**

Click Here to Hide Menu

Home > Performance Appraisal > My Team Appraisal Help Unpin from shortcuts

Search Employee Select Appraisal Status

Employee 1
EMPP0013
Manager

Appraisal Status Pending L1 ratings **d**

L1 Manager Overall Rating **f**

Generic KRA KPI Skill set

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

h **i** SUBMIT SAVE AS DRAFT CANCEL

Employee 2
EMPP0030
Software Engineer

Appraisal Status Pending L1 ratings

L1 Manager Overall Rating

e Expand

Employee 3
EMPP0014
Software Engineer

Appraisal Status Pending employee ratings

Employee 4
EMPP0015
Software Engineer

Appraisal Status Pending employee ratings

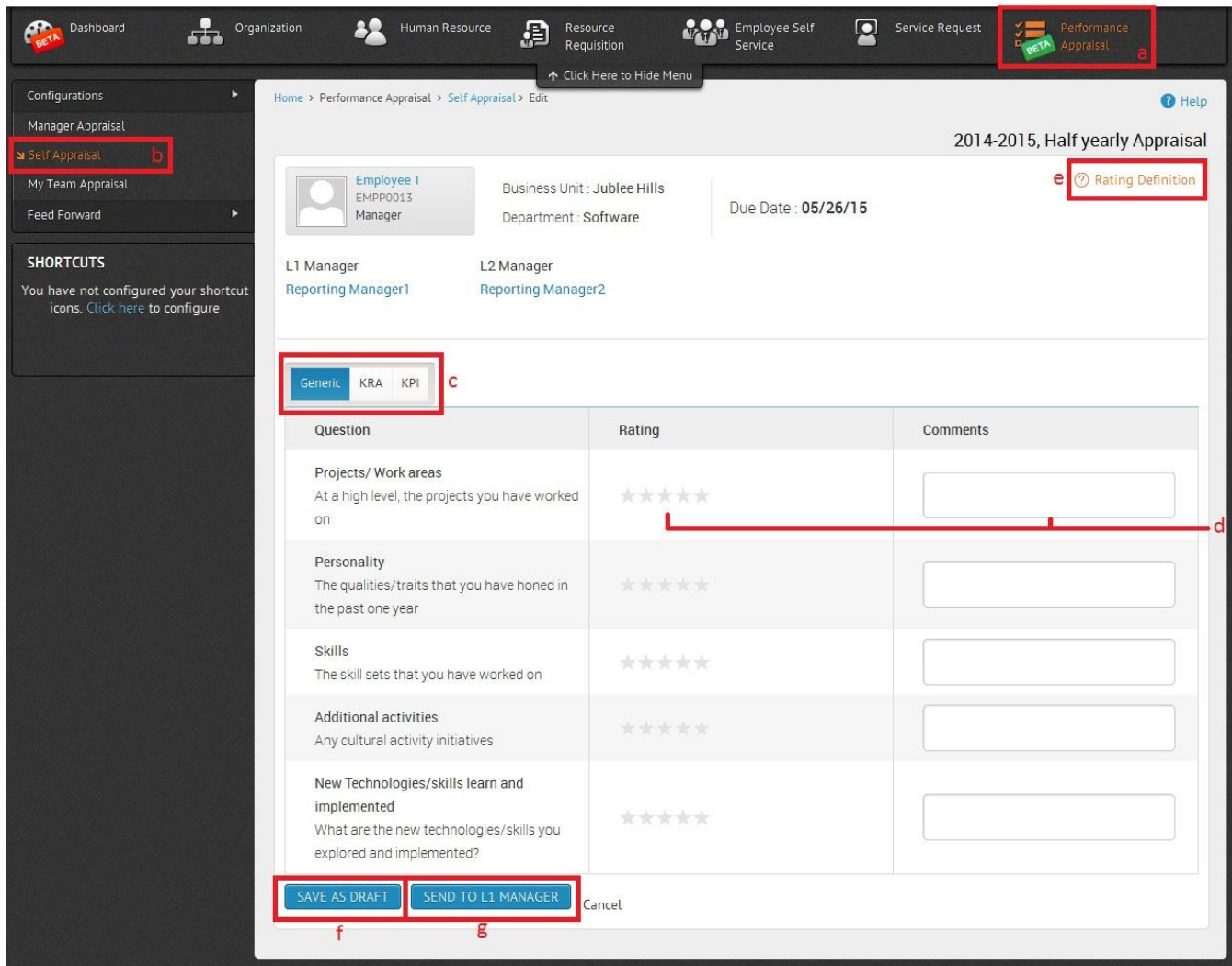
Figure 118

Self Appraisal

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

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

Refer Figure 119



Dashboard Organization Human Resource Resource Requisition Employee Self Service Service Request Performance Appraisal **a**

Click Here to Hide Menu

Home > Performance Appraisal > Self Appraisal > Edit

2014-2015, Half yearly Appraisal

Employee 1
EMPP0013
Manager

Business Unit : Jubilee Hills
Department : Software

Due Date : 05/26/15

L1 Manager
Reporting Manager1

L2 Manager
Reporting Manager2

Generic KRA KPI **c**

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

Rating Definition **e**

SAVE AS DRAFT **f** SEND TO L1 MANAGER **g** Cancel

Figure 119

Feed Forward

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

Questions

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

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

Refer Figure 120

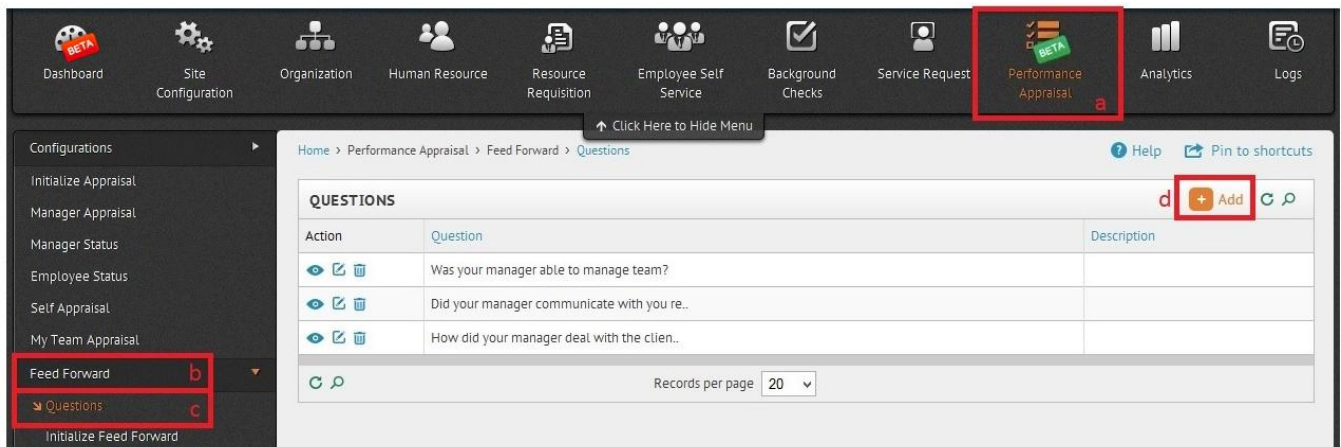


Figure 120

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

Refer Figure 121

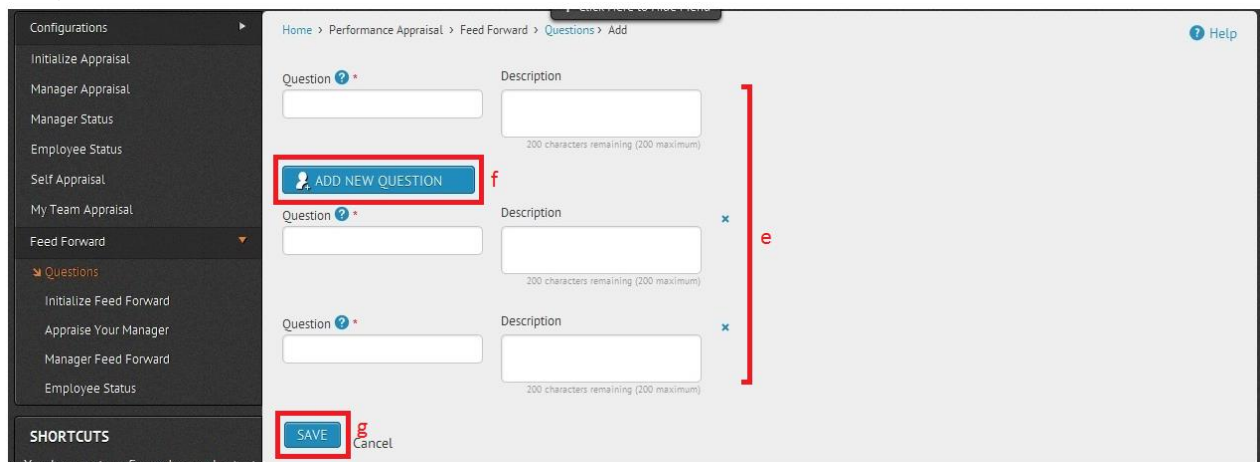


Figure 121

Initialize feed forward

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

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

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

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

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

Show: Employee names and their feedbacks will be displayed

Hide: Only the feedbacks will be displayed

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

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

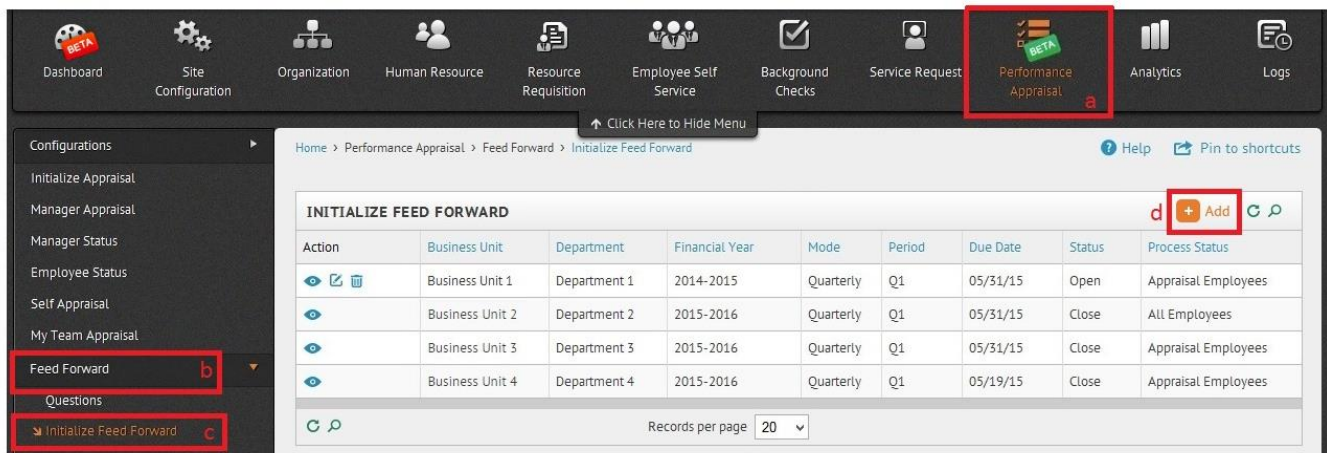
All Employees: All the employees in the organization can appraise their managers

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

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

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

Refer Figure 122









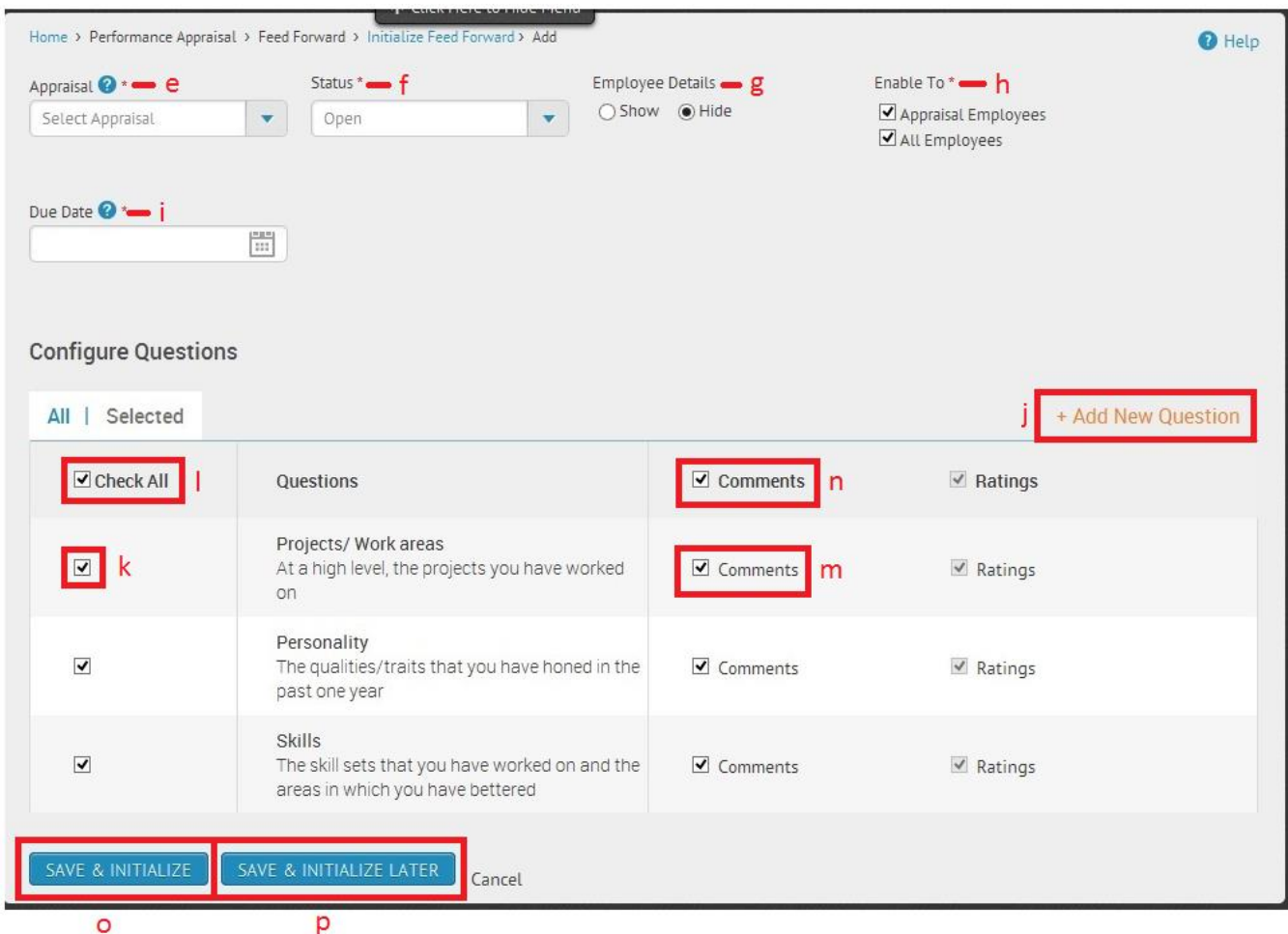
Action	Business Unit	Department	Financial Year	Mode	Period	Due Date	Status	Process Status
  	Business Unit 1	Department 1	2014-2015	Quarterly	Q1	05/31/15	Open	Appraisal Employees
	Business Unit 2	Department 2	2015-2016	Quarterly	Q1	05/31/15	Close	All Employees
	Business Unit 3	Department 3	2015-2016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

Figure 122

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

Refer Figure 123



Home > Performance Appraisal > Feed Forward > Initialize Feed Forward > Add

Appraisal **e** Status **f** Employee Details **g** Enable To **h**

Select Appraisal: [dropdown] Open [dropdown] [Show] [Hide]

Due Date **i** [calendar]

☒ Appraisal Employees
☒ All Employees

Configure Questions

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

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

o **p**

SAVE & INITIALIZE SAVE & INITIALIZE LATER Cancel

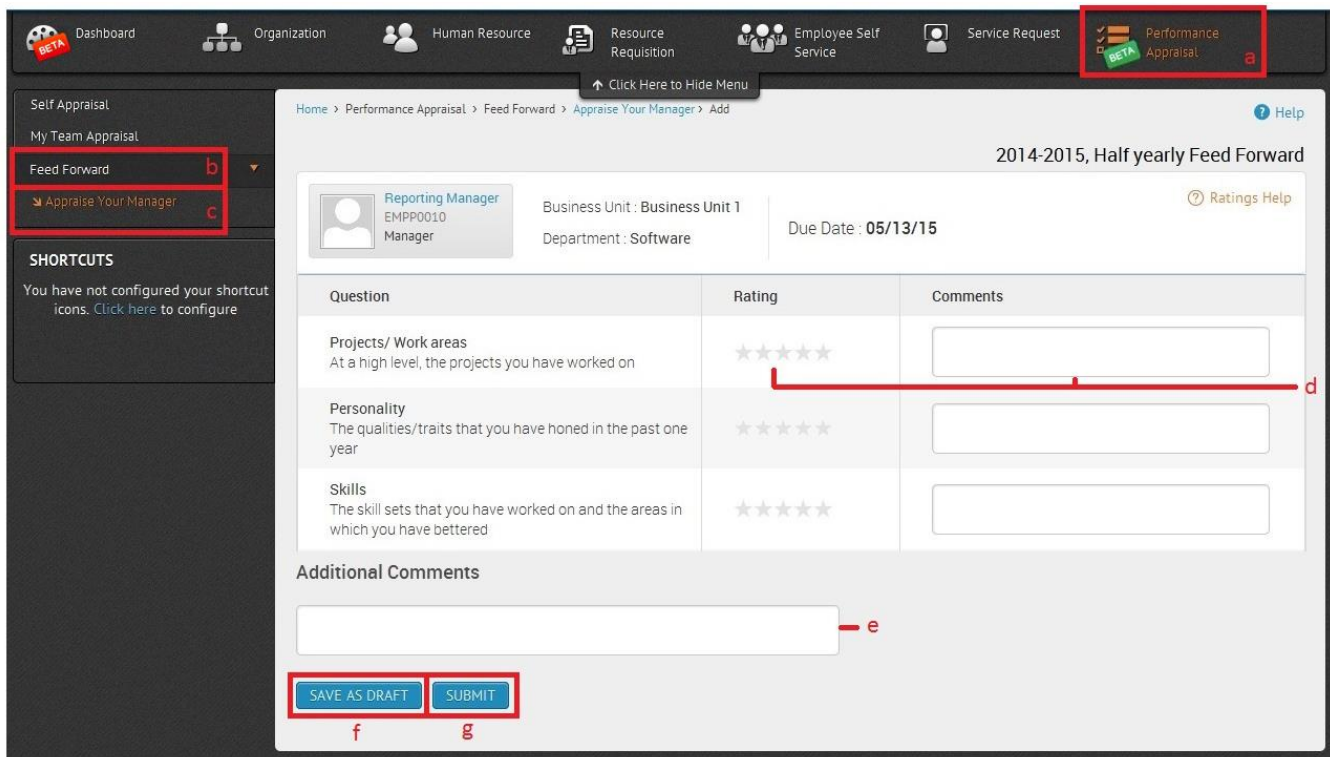
Figure 123

Appraise Your Managers

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

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

Refer Figure 124



The screenshot shows the Sentrifugo Performance Appraisal interface. The top navigation bar includes links for Dashboard, Organization, Human Resource, Resource Requisition, Employee Self Service, Service Request, and Performance Appraisal (highlighted with a red box and label 'a'). The left sidebar menu includes Self Appraisal, My Team Appraisal, Feed Forward (highlighted with a red box and label 'b'), and Appraise Your Manager (highlighted with a red box and label 'c'). The main content area displays the '2014-2015, Half yearly Feed Forward' form. The form includes a header with the Reporting Manager's name (EMPP0010), Business Unit (Business Unit 1), Department (Software), and Due Date (05/13/15). Below the header is a table with three columns: Question, Rating, and Comments. The table contains three rows of questions: Projects/ Work areas, Personality, and Skills. Each row has a five-star rating system and a text input field for comments. A red line connects the 'Appraise Your Manager' link in the sidebar to the 'Appraise Your Manager' link in the breadcrumb trail. Below the table is an 'Additional Comments' section with a text input field (labeled 'e'). At the bottom of the form are two buttons: 'SAVE AS DRAFT' (labeled 'f') and 'SUBMIT' (labeled 'g').

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

Additional Comments

SAVE AS DRAFT **SUBMIT**

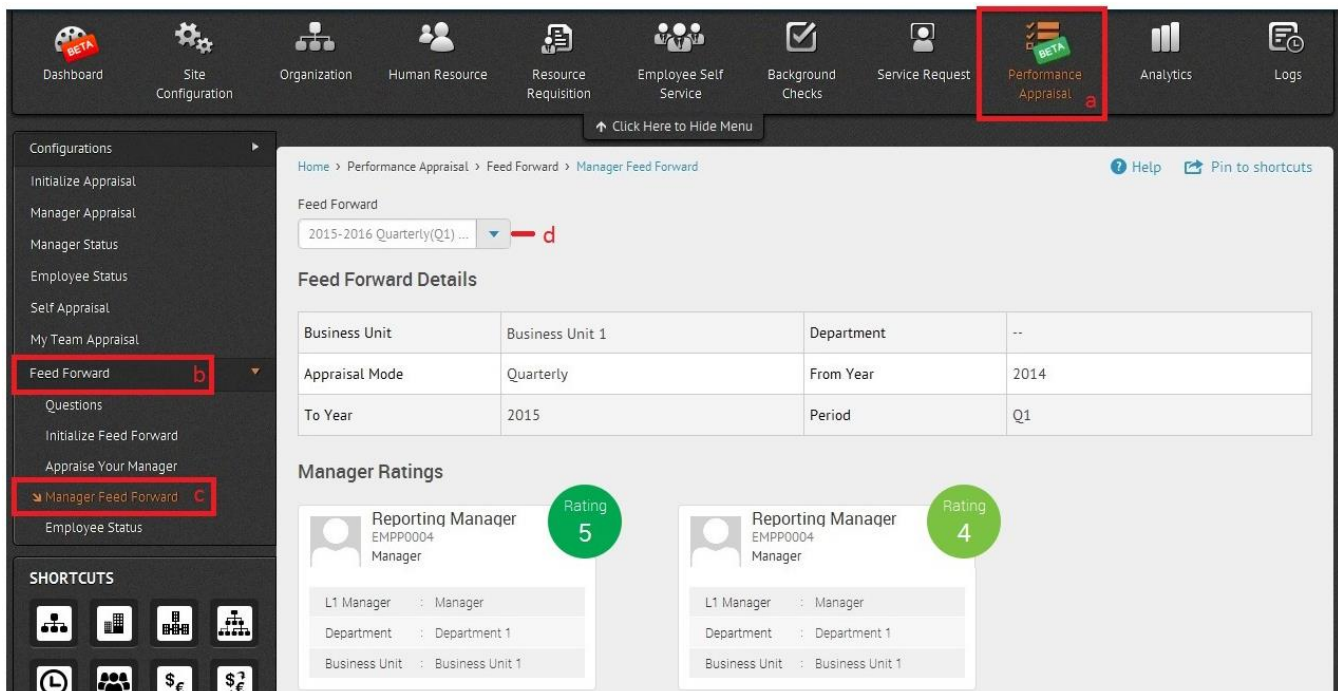
Figure 124

Manager Feed Forward

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

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

Refer Figure 125



Dashboard Site Configuration Organization Human Resource Resource Requisition Employee Self Service Background Checks Service Request **Performance Appraisal** Analytics Logs

Click Here to Hide Menu

Home > Performance Appraisal > Feed Forward > Manager Feed Forward

Feed Forward

2015-2016 Quarterly(Q1) ...

Feed Forward Details

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

Manager Ratings

Reporting Manager
EMPP0004
Manager

Rating 5

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

Reporting Manager
EMPP0004
Manager

Rating 4

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

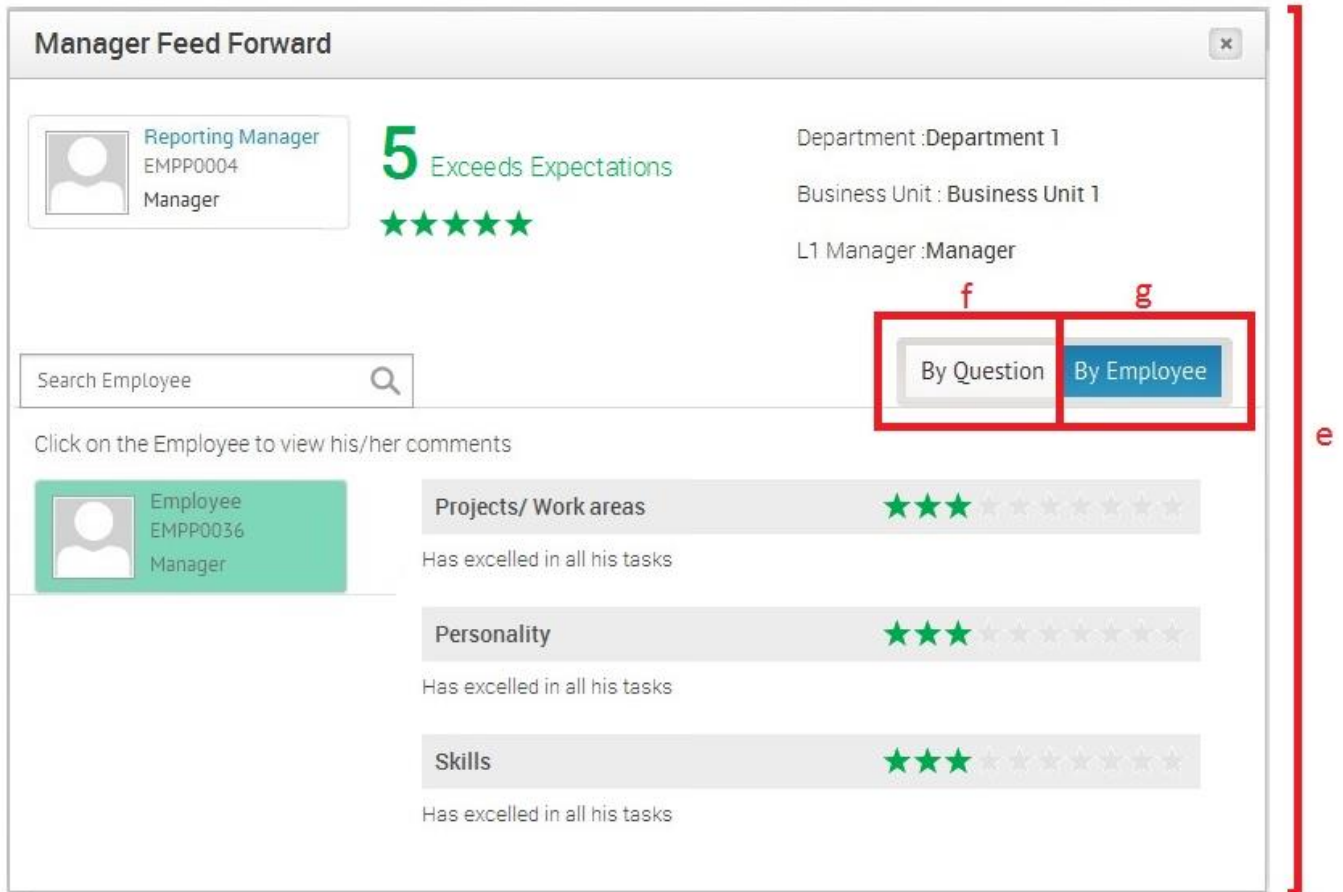
SHORTCUTS

Icons for various HR functions: Organization, Analytics, Finance, HR, etc.

Figure 125

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

Refer Figure 126



Manager Feed Forward

Reporting Manager
EMPP0004
Manager

5 Exceeds Expectations
★★★★★

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

Search Employee

Click on the Employee to view his/her comments

Employee
EMPP0036
Manager

Projects/ Work areas ★★★★★
Has excelled in all his tasks

Personality ★★★★★
Has excelled in all his tasks

Skills ★★★★★
Has excelled in all his tasks

By Question By Employee

e

Figure 126

Employee Status

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

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

Refer Figure 127

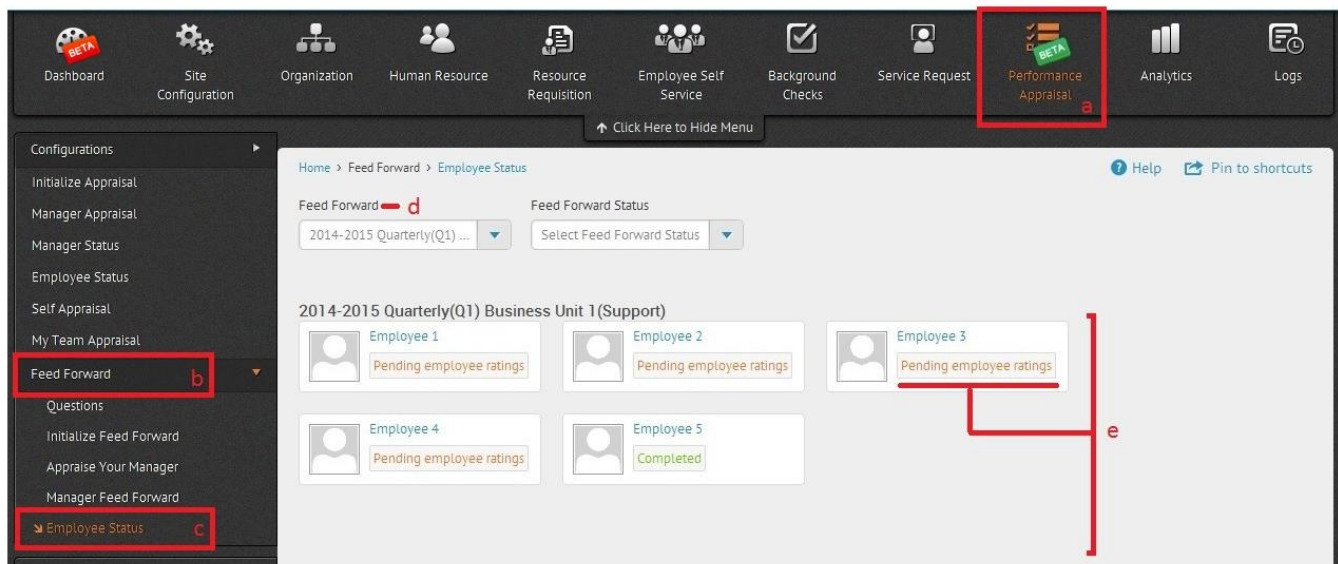


Figure 127