

# Sentrifugo

## Import Format Guide

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## 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 1

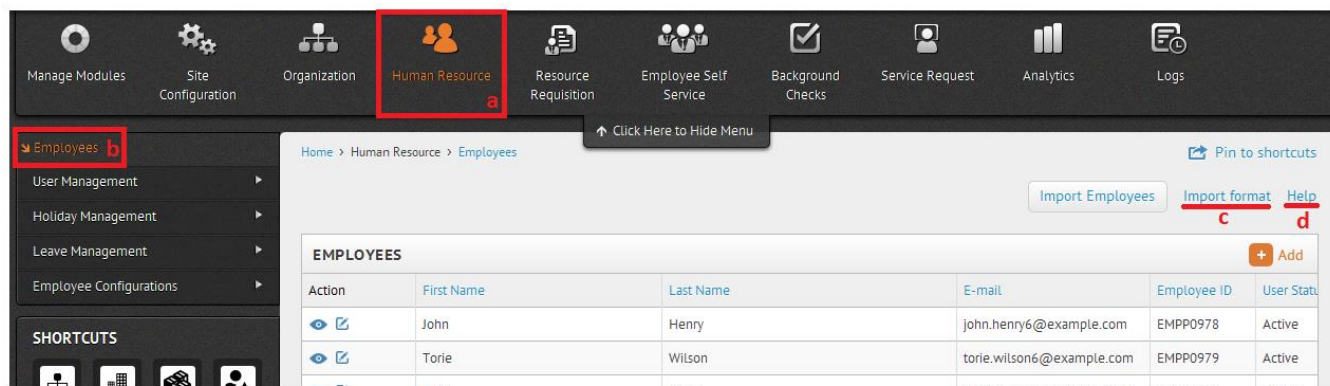
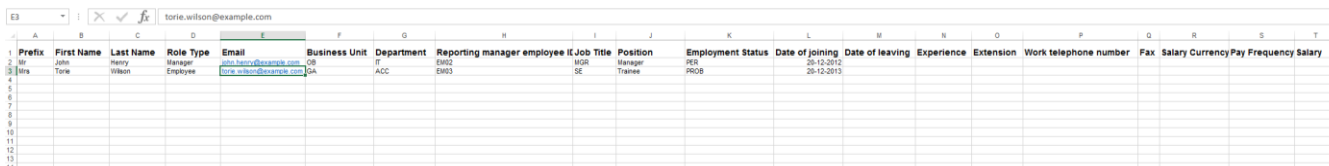


Figure 1

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

Refer Figure 2 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.henry6@example.com	HR	ACC		SE	Manager	PER	20-12-2015									
Mrs	Torie	Wilson	Employee	torie.wilson6@example.com	HR	ACC			Trainee	PROB	20-12-2015									

Figure 2

## 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 3

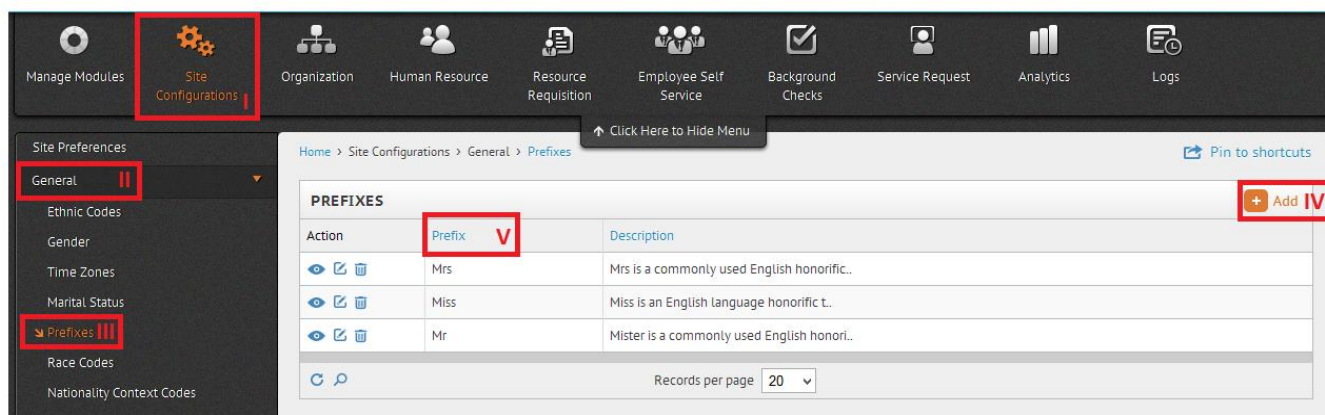


Figure 3

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 4

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

Figure 4

### 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 5

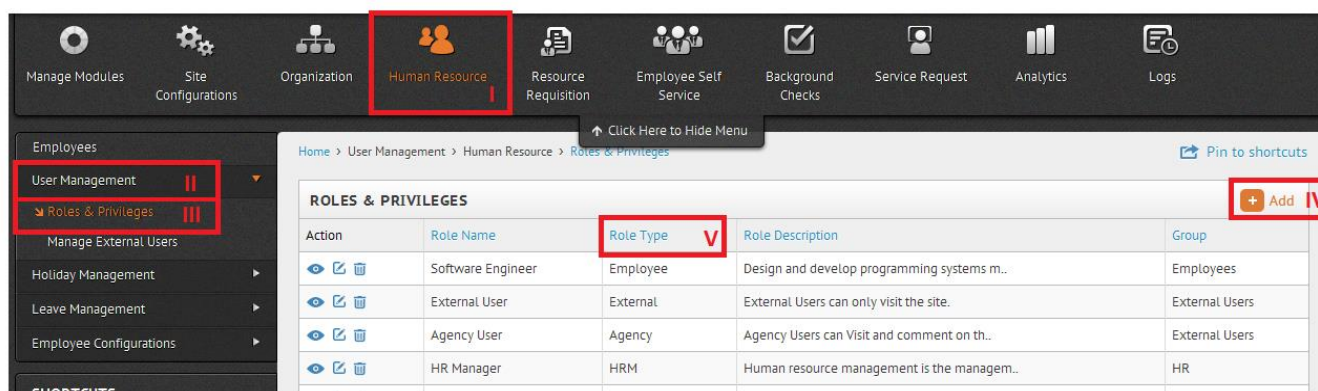


Figure 5

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

### d. Enter the email of the employee

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

Refer figure 6

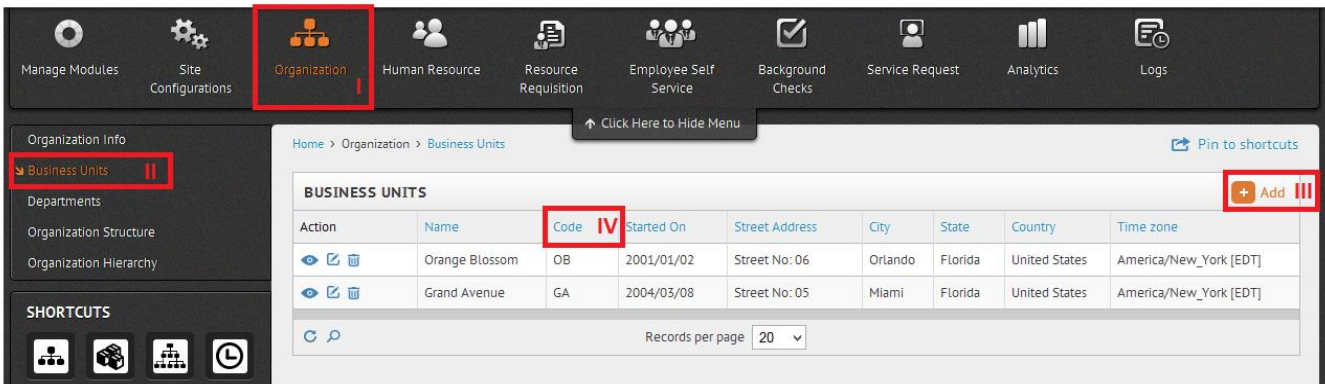
	C	D	E
ne	Role	Email	Business Unit

Figure 6

### 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 7



Home > Organization > Business Units

**BUSINESS UNITS**

Action	Name	Code	Started On	Street Address	City	State	Country	Time zone
  	Orange Blossom	OB	2001/01/02	Street No: 06	Orlando	Florida	United States	America/New_York [EDT]
  	Grand Avenue	GA	2004/03/08	Street No: 05	Miami	Florida	United States	America/New_York [EDT]

Records per page: 20

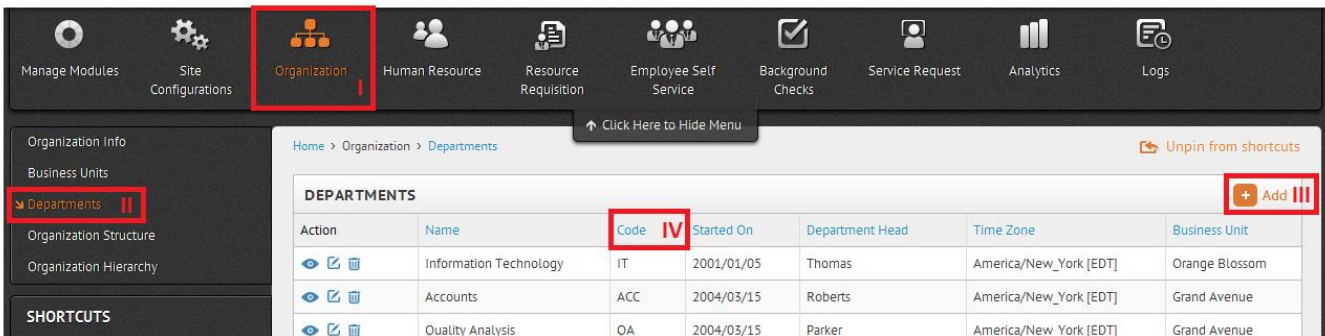
Figure 7

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 8



Home > Organization > Departments

**DEPARTMENTS**










Action	Name	Code	Started On	Department Head	Time Zone	Business Unit
  	Information Technology	IT	2001/01/05	Thomas	America/New_York [EDT]	Orange Blossom
  	Accounts	ACC	2004/03/15	Roberts	America/New_York [EDT]	Grand Avenue
  	Quality Analysis	QA	2004/03/15	Parker	America/New_York [EDT]	Grand Avenue

Figure 8

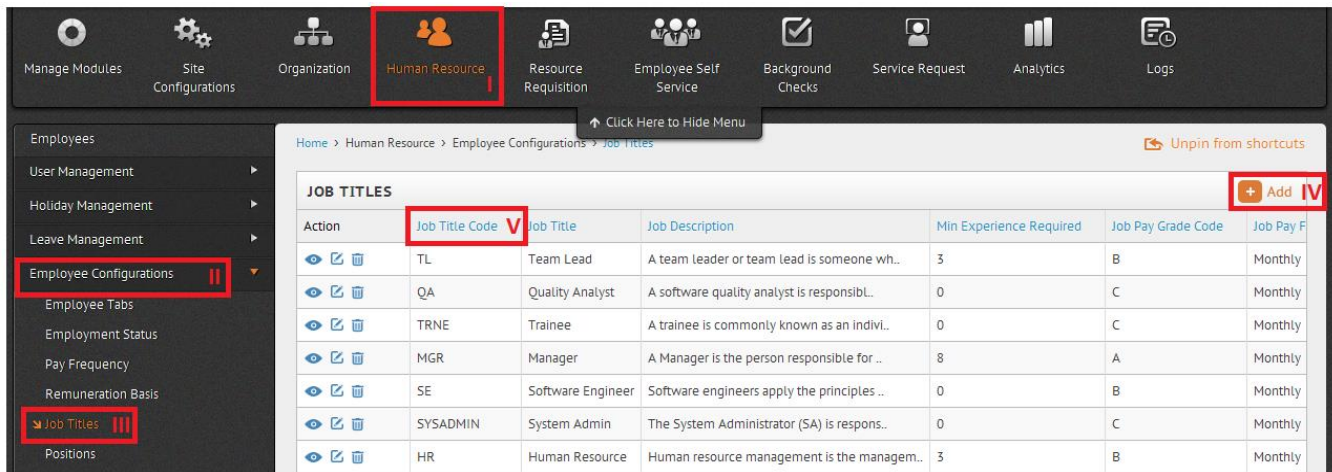
Note: You can only enter departments that are existing in the application

## 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 9



Home > Human Resource > Employee Configurations > Job Titles

Unpin from shortcuts

**JOB TITLES** + Add IV






















Action	Job Title Code V	Job Title	Job Description	Min Experience Required	Job Pay Grade Code	Job Pay F
  	TL	Team Lead	A team leader or team lead is someone wh...	3	B	Monthly
  	QA	Quality Analyst	A software quality analyst is responsibl...	0	C	Monthly
  	TRNE	Trainee	A trainee is commonly known as an indivi...	0	C	Monthly
  	MGR	Manager	A Manager is the person responsible for ..	8	A	Monthly
  	SE	Software Engineer	Software engineers apply the principles ..	0	B	Monthly
  	SYSADMIN	System Admin	The System Administrator (SA) is respons..	0	C	Monthly
  	HR	Human Resource	Human resource management is the managem..	3	B	Monthly

Figure 9

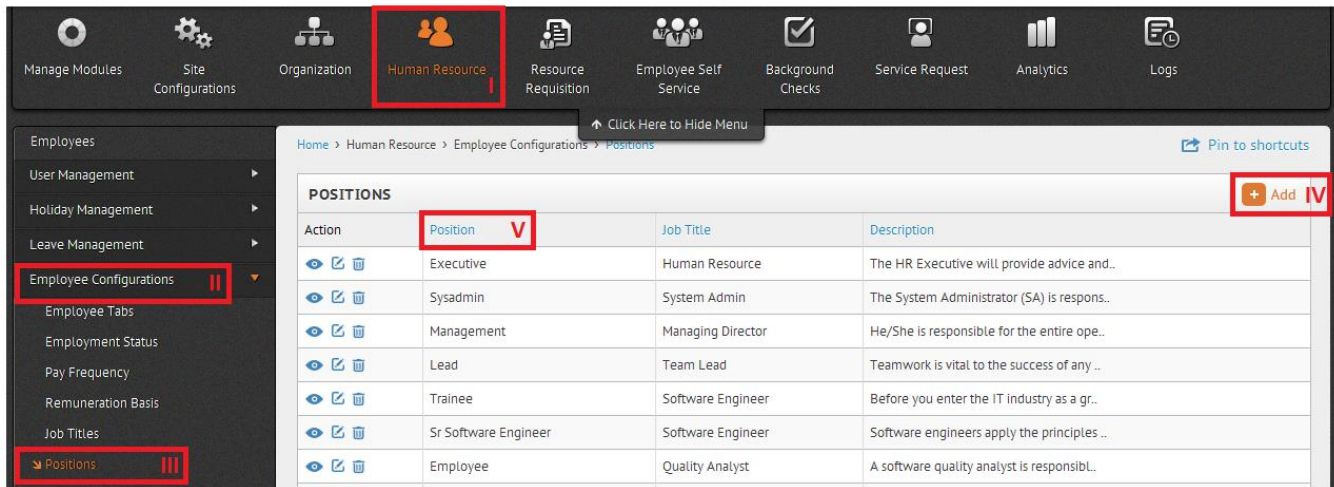
Note: You can only enter job titles that are existing in the application



## 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 10



The screenshot displays the Sentrifugo HRMS interface. The top navigation bar includes 'Manage Modules', 'Site Configurations', 'Organization', 'Human Resource' (highlighted with a red box), 'Resource Requisition', 'Employee Self Service', 'Background Checks', 'Service Request', 'Analytics', and 'Logs'. The left sidebar shows 'Employees', 'User Management', 'Holiday Management', 'Leave Management', 'Employee Configurations' (highlighted with a red box), 'Employee Tabs', 'Employment Status', 'Pay Frequency', 'Remuneration Basis', 'Job Titles', and 'Positions' (highlighted with a red box). The main content area shows the 'POSITIONS' table with columns: Action, Position (highlighted with a red box and a 'V' icon), Job Title, and Description. The table lists several positions: Executive, Sysadmin, Management, Lead, Trainee, Sr Software Engineer, and Employee. An 'Add' button (highlighted with a red box and labeled 'IV') is located in the top right corner of the table.






















Action	Position	Job Title	Description
  	Executive	Human Resource	The HR Executive will provide advice and..
  	Sysadmin	System Admin	The System Administrator (SA) is respons..
  	Management	Managing Director	He/She is responsible for the entire ope..
  	Lead	Team Lead	Teamwork is vital to the success of any ..
  	Trainee	Software Engineer	Before you enter the IT industry as a gr..
  	Sr Software Engineer	Software Engineer	Software engineers apply the principles ..
  	Employee	Quality Analyst	A software quality analyst is responsibl..

Figure 10

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 11

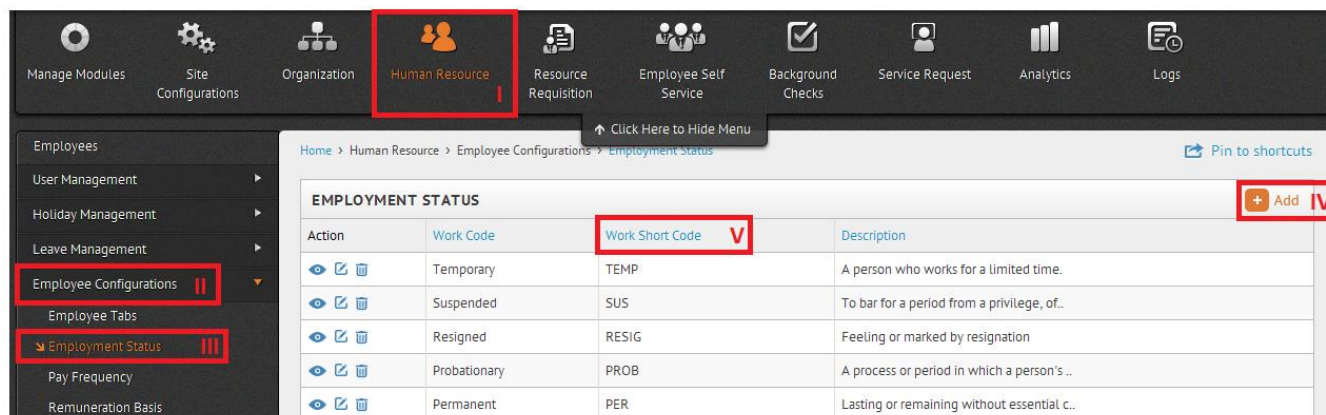


Figure 11

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 12 for guidance

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

Figure 12

### 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 13

K	L	M
Date of joining	Date of leaving	Experience

Figure 13

### m. Enter the employee Experience

- I. This field is not mandatory

Refer Figure 14

L	M	N
Date of leaving	Experience	Extension

Figure 14

**n. Enter the employee Extension**

- I. This field is not mandatory

Refer Figure 15

M	N	
Experience	Extension	Work tele

Figure 15

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

- I. This field is not mandatory

Refer Figure 16

N	O	P
Extension	Work telephone number	Fax

Figure 16

**p. Enter the employee Fax**

- I. This field is not mandatory

Refer Figure 17

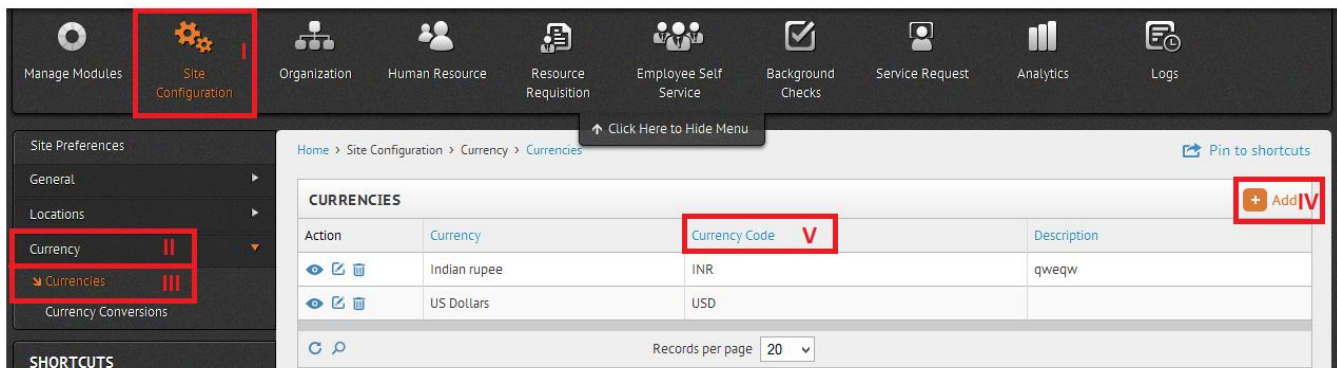
O	P	Q
Phone number	Fax	

Figure 17

**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 18



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Manage Modules', 'Site Configuration' (highlighted with a red box), 'Organization', 'Human Resource', 'Resource Requisition', 'Employee Self Service', 'Background Checks', 'Service Request', 'Analytics', and 'Logs'. The left sidebar shows 'Site Preferences' with '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 Description. The table contains two rows: 'Indian rupee' with code 'INR' and 'US Dollars' with code 'USD'. An 'Add' button (highlighted with a red box) is located in the top right corner of the table. The bottom of the table shows 'Records per page' set to 20.

Figure 18

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 19

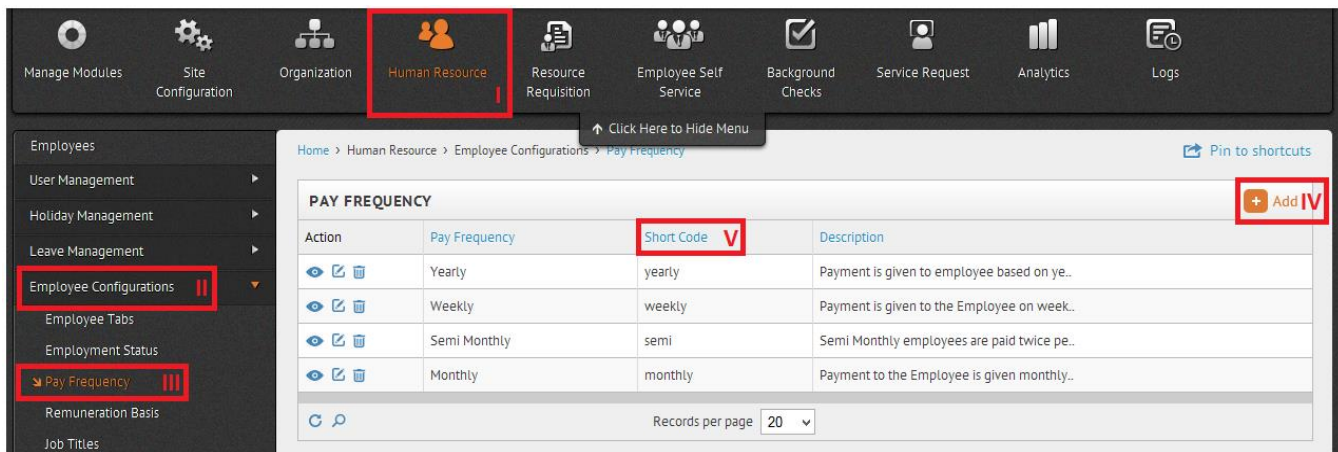


Figure 19

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 20

S	T	U
Pay Frequency	Salary	

Figure 20