

Training Recap: Time Off Module

This document summarizes the key points we discussed during our recent training session on the Time Off module.

During the session, we covered the following topics:

- Overview of the Time Off module and its interface and the other modules
- How employees can request time off
- Manager workflow for approvals and rejections
- How to create and manage different time off types (e.g., Paid, Sick, Unpaid)
- Allocating leave manually from HR side
- Viewing the time off calendar for better planning
- Configuring rules such as approval steps and leave limits
- Automatic notifications and email alerts

The purpose of the manual document was to provide a clear understanding of how to use the module address any specific needs for your team and ensure everyone is confident in navigating and using the system.

What Is the Time Off Module?

The Time Off module in Odoo allows employees to **request leave**, and managers or HR to **approve, allocate, and manage** those leave requests. It tracks time off like:

- Sick leave
- Public holidays
- Unpaid leave
- Mandatory days

It helps automate leave management and keep everything organized in one place.

Main Features of the Time Off Module

1. Dashboard

- Shows total time off balances.
- Displays a calendar with everyone's time off (if allowed).
- Easy buttons to request or approve leave.



2. Overview

To view a color-coded schedule of the user's time off, and/or of the team managed by them, navigate to Time Off app ▶ Overview. This presents a calendar with the default filter of My Team, in a month view.

To change the time period displayed, click on the Month button to reveal a drop-down menu. Then, select either Day, Week, or Year to present the calendar in that corresponding view.

To navigate forward or backward in time, in the selected increment (Month, Week, etc.), click the ← (left arrow) or → (right arrow) to move either forward or backward in that specified amount of time.

For example, if Month is selected, the arrows adjust the view by one month.

To return to a view containing the current day, click the Today button at any time.

Team members are listed alphabetically on individual lines, and their requested time off, regardless of the status (validated or to approve), is visible on the calendar.

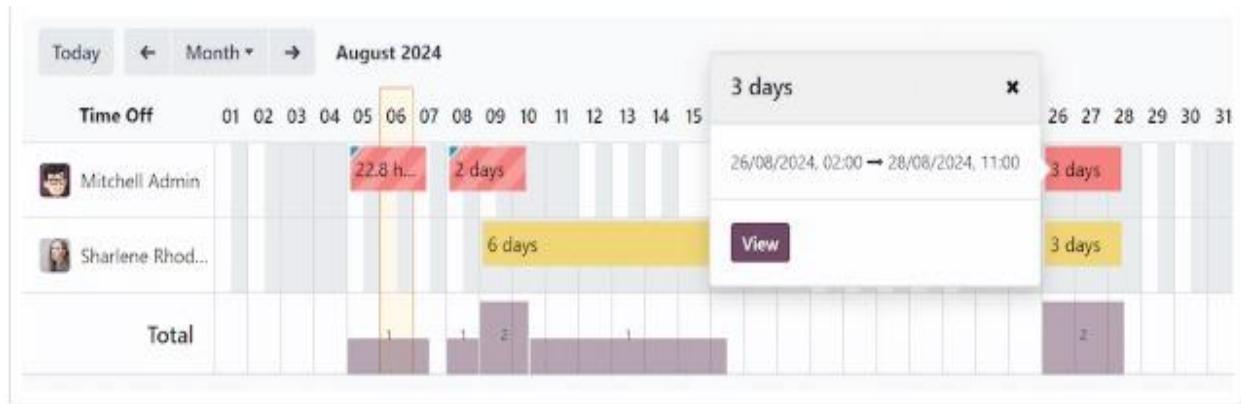
Each employee is color-coded. The employee's color is selected at random, and does not correspond to the type of time off they requested.

The status of the time off is represented by the color detail of the request, either appearing solid (validated) or striped (to approve).

The number of days or hours requested is written on the request (if there is enough space).

At the bottom of the calendar, in the Total line, a bar graph shows how many people are projected to be out on any given day. The number on each individual bar represents the number of employees out for those highlighted days.

Click on a time off entry to view the details for the specific time off entry. The total number of hours or days are listed, along with the start and end time of the time off. To view the details of the time off request in a modal, click the View button.



3. Time Off Types

You can define different types of leave, for example:

- Paid Time Off
- Sick Leave
- Annual leave

Each type can have:

- Approval rules
- Carry forward rules
- Validity dates (e.g., only valid this year)

→ Where to find:

Time Off → Configuration → Time Off Types

Sick Time Off

EN

TIME OFF REQUESTS		ALLOCATION REQUESTS	
Approval	<input type="radio"/> No Validation <input checked="" type="radio"/> By Time Off Officer <input type="radio"/> By Employee's Approver <input type="radio"/> By Employee's Approver and Time Off Officer	Requires allocation	<input checked="" type="radio"/> Yes <input type="radio"/> No Limit
		Employee Requests	<input checked="" type="radio"/> Extra Days Requests Allowed <input type="radio"/> Not Allowed
		Approval	<input checked="" type="radio"/> Approved by Time Off Officer <input type="radio"/> No validation needed
CONFIGURATION		NEGATIVE CAP	
Notified Time Off Officer	Mitchell Admin <input type="button" value="X"/>	Allow Negative Cap	<input checked="" type="checkbox"/>
Take Time Off in	Day	Amount in Negative	5
Allow To Attach Supporting Document	<input checked="" type="checkbox"/>		
Kind of Time Off	Absence		
Company	My US Company		

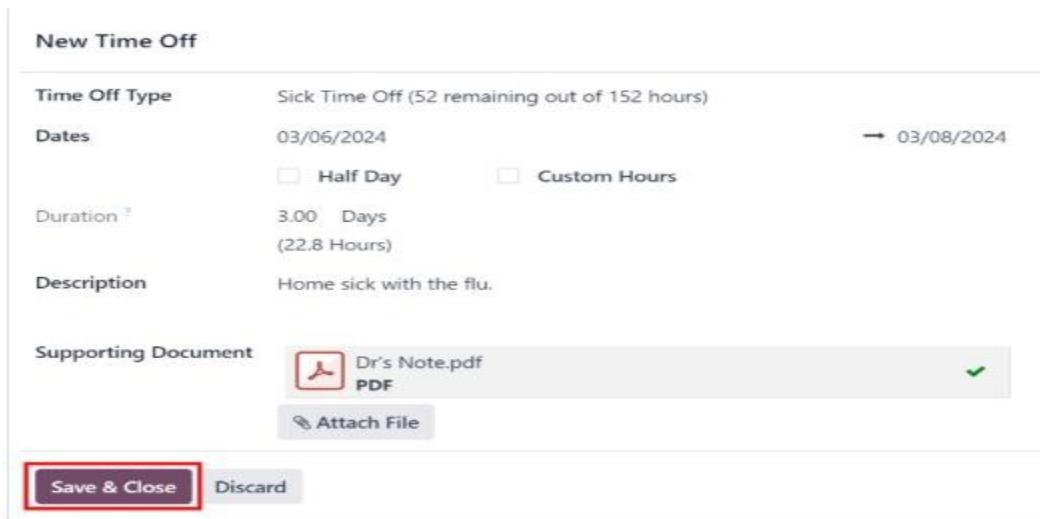
4. Requesting Time Off (Employee Side)

Employees can request leave in just a few clicks:

1. Go to Time Off module.
2. Click “**New**” or “**Request Time Off**” or “**My time >> my time off >> new**”
3. Choose:
 - Time off type (e.g., Paid, Sick)
 - Dates (From – To)
 - Reason (optional)
4. Submit for approval.

They can see:

- Their leave balance.
- Approval status.
- History of past requests.



New Time Off

Time Off Type: Sick Time Off (52 remaining out of 152 hours)

Dates: 03/06/2024 → 03/08/2024

Duration: 3.00 Days (22.8 Hours)

Description: Home sick with the flu.

Supporting Document: Dr's Note.pdf (PDF)

Save & Close Discard

5. Approving Time Off (Manager or HR Side)

Managers can:

- See all pending requests.
- Approve or reject with comments.
- See overlapping time off (to avoid team conflicts).

→ Go to Time Off → Management → Time Off

6. Allocating Time Off (HR Side)

Sometimes, you may want to **give leave days manually**, for example:

- New hire gets 10 days.
- Employee earns bonus time off.

Steps:

1. Go to Time Off → Allocations → Click **New**
2. Choose the employee, time off type, and number of days
3. Save and approve (if needed)

Paid Time Off (10.0 day(s))

Time Off Type: Paid Time Off Employee: Mitchell Admin

Allocation Type: Regular Allocation Accrual Allocation

Validity Period: 01/01/2024 → No Limit

Allocation: 10.00 Days

Standard annual two week PTO.

New Allocation

Sick Time Off (5.0 day(s))

Time Off Type: Sick Time Off (2 remaining out of 2 days)

Allocation: 5.00 Days

Having surgery. Need additional recovery time.

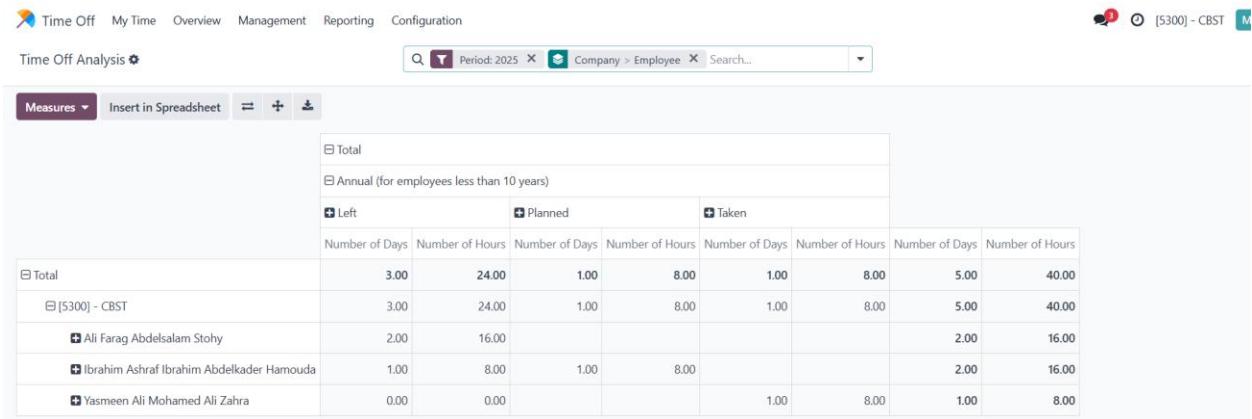
Save & Close **Discard**

7. Reports and Balances

Go to Time Off → Reporting

See usage by employee or by type.

- Export to Excel.
- Helps track trends or absenteeism.



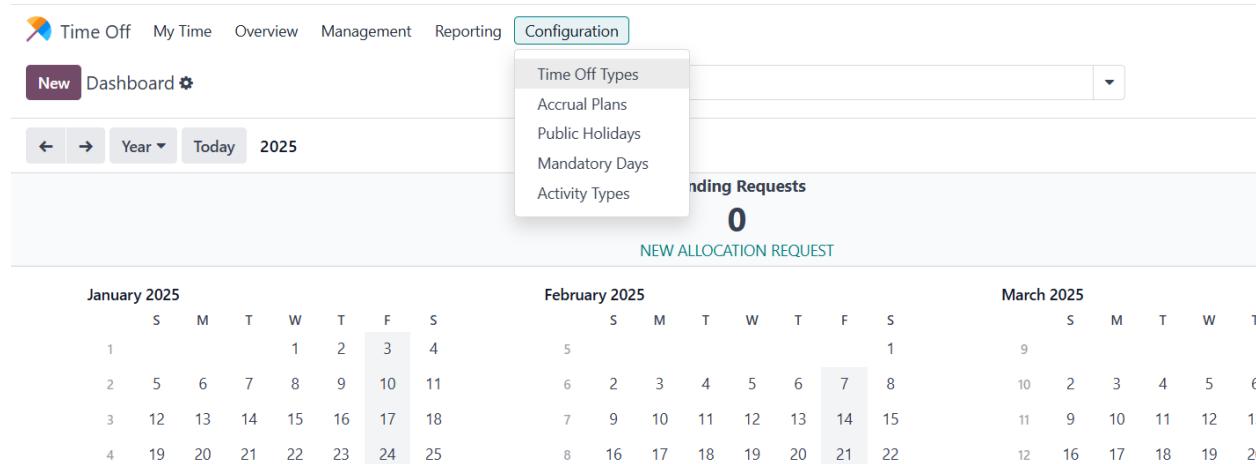
The screenshot shows a report titled 'Time Off Analysis' for the period 2025. The report is filtered for 'Company > Employee'. The interface includes a 'Measures' dropdown and an 'Insert in Spreadsheet' button. The data is presented in a grid format with columns for 'Number of Days' and 'Number of Hours' for 'Left', 'Planned', and 'Taken' categories. The report includes a header for 'Total' and 'Annual (for employees less than 10 years)'. The data rows list employees: 'Total', '[5300] - CBST', 'Ali Farag Abdelsalam Stohy', 'Ibrahim Ashraf Ibrahim Abdelkader Hamouda', and 'Yasmeen Ali Mohamed Ali Zahra'. Each row shows the number of days and hours for each category.

8. Configuration Options (for Admins)

Under Configuration, you can:

- Add or edit time off types.
- Set approval levels.
- Link to company holidays.
- Set limits, like max carry-over days.

→ Go to Time Off → Configuration



The screenshot shows the 'Configuration' tab selected in the Time Off navigation bar. A dropdown menu is open, showing options: 'Time Off Types', 'Accrual Plans', 'Public Holidays', 'Mandatory Days', and 'Activity Types'. The main area displays a 'Pending Requests' section with a count of 0 and a 'NEW ALLOCATION REQUEST' button. Below this is a three-month calendar grid for January, February, and March 2025. The grid shows days of the week (S, M, T, W, T, F, S) and dates. The month of January starts on a Saturday (1) and ends on a Sunday (25). The month of February starts on a Saturday (5) and ends on a Sunday (25). The month of March starts on a Saturday (9) and ends on a Sunday (25). The calendar is color-coded with light blue for weekends and grey for public holidays.

9. Automatic Time Off Accruals

You can configure rules so time off is automatically added:

- Every month, for example: employees earn 1.75 days.
- Reset balance every January.

Requires some setup under **Accrual Plans through New Milestone**

Milestone Fields:

- Employee Accrue: How many days/hours they gain
- Frequency: Monthly, Yearly, or based on joining
- Cap Accrued Time: Prevents exceeding a certain balance
- Carry Over: Allows unused leave to carry forward
- Carry Over Validity: Number of days carry-over is valid
- Start Accruing: Delay before leave accrual begins
- Milestone Cap: Limit per milestone if used

→ Go to Time Off → Configuration → Accrual Plans

Name	Seniority Plan	Based on worked time?
Accrued Gain Time	<input type="radio"/> At the start of the accrual period <input checked="" type="radio"/> At the end of the accrual period	<input type="checkbox"/>
Carry-Over Time	<input checked="" type="radio"/> At the start of the year <input type="radio"/> At the allocation date <input type="radio"/> Other	Milestone Transition? <input checked="" type="radio"/> Immediately <input type="radio"/> After this accrual's period
	Company	My Company (San Francisco)

Create Milestone

Employee accrue?	5.00000	Days	
	Yearly	on the 1	of January
Cap accrued time	<input checked="" type="checkbox"/>	100.00	Days
Milestone reached?	1	Days	after allocation start date
Carry over	<input type="radio"/> None. Accrued time reset to 0 <input checked="" type="radio"/> All accrued time carried over <input type="radio"/> Carry over with a maximum		

Save & Close

Save & New

Discard

10. Steps to Upload Bulk Time Off Requests:

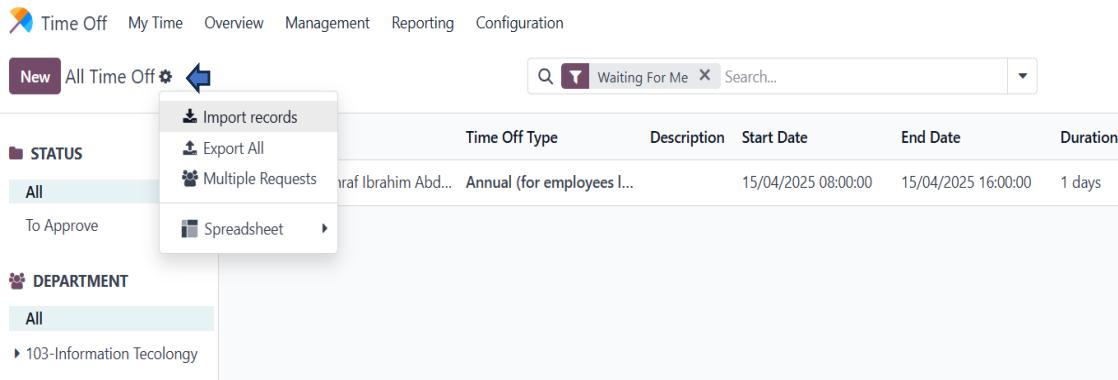
Step 1: Go to Time Off Requests

- Navigate to:
Time Off → Management → Time Off

Step 2: Prepare Import File

Step 3: Upload and Validate

- Go to Time Off → Import
- Upload the file and match fields
- Validate and then click Import



The screenshot shows the 'Time Off' management interface. At the top, there are navigation links: Time Off, My Time, Overview, Management, Reporting, and Configuration. Below this is a search bar with the placeholder 'Waiting For Me' and a dropdown menu. On the left, there are filters for 'STATUS' (set to 'All') and 'DEPARTMENT' (set to 'All'). A dropdown menu is open over the 'All' status filter, showing options: Import records (which is highlighted in grey), Export All, Multiple Requests, and Spreadsheet. To the right of the filters, a table lists a single time off request: 'Time Off Type' (Annual), 'Description' (Annual (for employees i...)), 'Start Date' (15/04/2025 08:00:00), 'End Date' (15/04/2025 16:00:00), and 'Duration' (1 days). The table has columns for Time Off Type, Description, Start Date, End Date, and Duration.

11. Steps to Upload Initial Balances:

Step 1: Go to Time Off Allocations

- Navigate to:
Time Off → Time Off → Allocations

Step 2: Create a Template for Import

1. Click "Export" (top-right)
2. Download a sample Excel or CSV template
3. Prepare your file with the needed columns

The screenshot shows the Odoo Time Off module. At the top, there are navigation links: Time Off, My Time, Overview, Management, Reporting, and Configuration. Below this is a search bar with 'New All Time Off' and a '1 selected' button. On the left, there are filters for STATUS (All, To Approve) and DEPARTMENT (All, 103-Information Technology). The main list shows a single record: Employee (Ibrahim Ashraf Ibrahim Abd...), Time Off Type (Annual (for employees 1...)), Description (Annual (for employees 1...)), Start Date (15/04/2020), and Duration (00:00 1 days). A context menu is open for this record, with options: Export (selected), Insert in spreadsheet, Duplicate, Delete, Multiple Requests, Manager Approval, HR Approval, Defer to Next Month, and Mark as deferred. Below the list is an 'Export Data' dialog. It has a checkbox for 'I want to update data (import-compatible export)'. Under 'Available fields', there is a list of fields with '+' icons to include them in the export. Under 'Fields to export', there is a list of fields with '-' icons to exclude them. The 'Export Format' is set to XLSX. At the bottom of the dialog are 'Export' and 'Close' buttons.

When you click the Export button in Odoo, you're preparing to download data from the system, usually into an Excel (XLSX) or CSV file. This is especially useful when you want to analyze, share, or update records in bulk, such as employee time off or attendance.

After clicking Export, Odoo shows you a screen where you configure what data to include in your export file.

This section shows a list of all the fields (columns) you can include in your export. These fields depend on the model or object you're working with (e.g., Time Off, Attendance, Employees).

Examples include:

- Employee Name
- Start Date
- End Date
- Number of Days
- Time Off Type
- Status

Step 3: Upload the File

- Go back to Allocations → Import
- Select your file
- Match the fields if prompted (Odoo may auto-detect)

- Click Test / If no errors, click Import

Step 4: Confirm Upload

- Go to each employee's Time Off → My Time Off
- Check the updated balance for that type
- Or use Reporting → Time Off to view totals

12. Notifications and Approvals

- Employees get email or app notification when approved or rejected.
- Managers get notified of pending requests.

The screenshot shows a time off management interface for the year 2024. At the top, there are buttons for navigating between months, selecting a year (2024), and viewing 'Today'. Below these are three summary boxes: 'Paid Time Off' (25 days available), 'Sick Time Off' (76 hours available, valid until 12/31/2024), and 'Balance at the 03/06/2024' (Today). A 'New Allocation Request' button is also present. The main area features a calendar for March and April 2024. March starts on a Saturday and ends on a Sunday. April starts on a Saturday and ends on a Sunday. Specific dates are highlighted: March 6th and April 13th are marked with red circles. A legend on the right defines colors for 'Time Off Type': purple for Sick Time Off, blue for Paid Time Off, and yellow for Vacation Time Off. A 'Mandatory Days' section notes 'March 13, 2024: Company Celebration'.

The screenshot shows a list of pending time off requests. At the top, there are buttons for 'New' and 'All Time Off'. A search bar with a 'Waiting For Me' filter is highlighted with a red box. The list includes columns for 'Employees', 'Time Off Type', 'Description', 'Start Date', 'End Date', 'Duration', and 'Status'. Three requests are listed:

- Marc ... (Sick Time Off, Sick day, 04/08/2024, 04/10/2024, 3 days) with status 'To Approve' (yellow button)
- Paul ... (Sick Time Off, Dentist app..., 04/01/2024, 04/01/2024, 1 days) with status 'To Approve' (yellow button)
- Anita ... (Paid Time Off, Trip, 03/11/2024, 03/13/2024, 3 days) with status 'Second A...' (yellow button)

Below the list, there are buttons for 'Approve' (blue checkmark), 'Refuse' (red X), and 'Validate' (green checkmark).