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

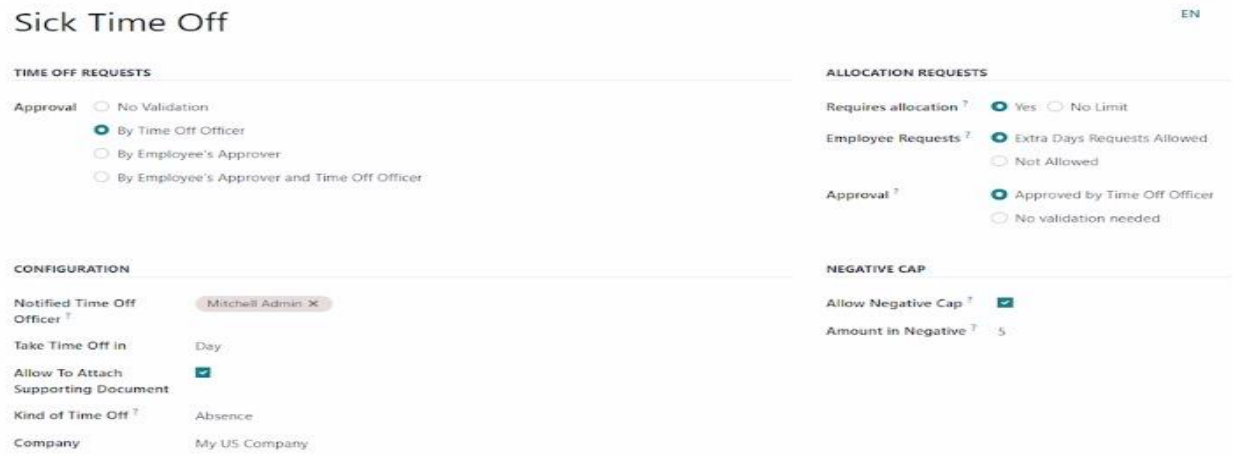
You can define different types of leave, for example:

- 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



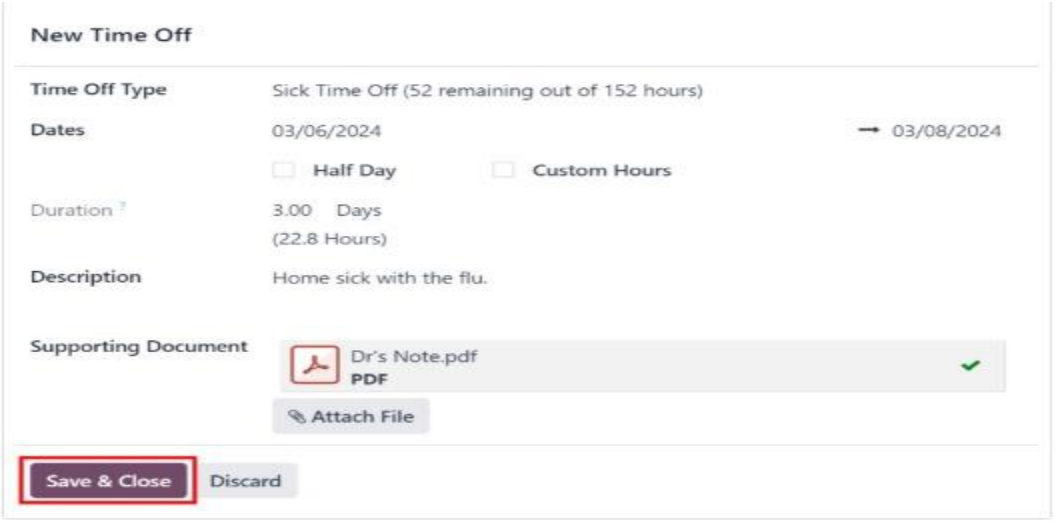
4. Requesting Time Off (Employee Side)

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.



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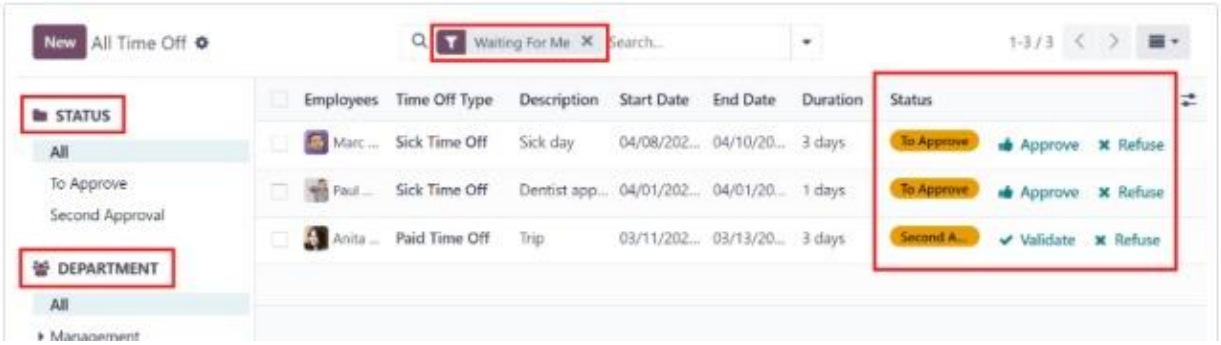
5. Approving Time Off (Manager or HR Side)

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



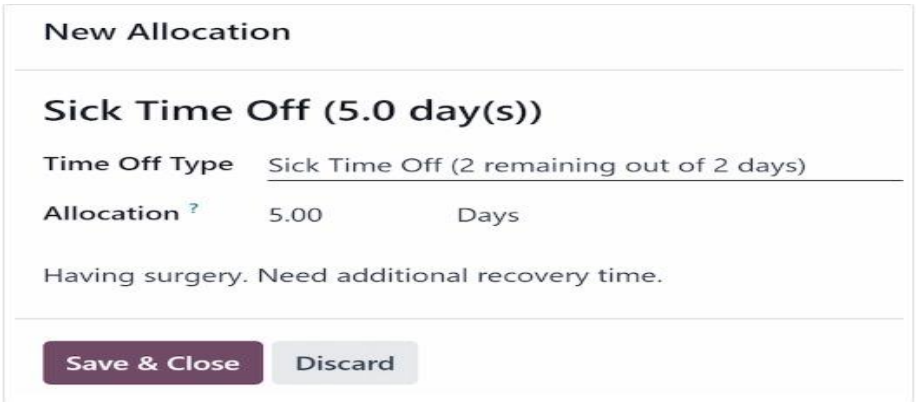
6. <u>Allocating Time Off (HR Side)</u>

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)

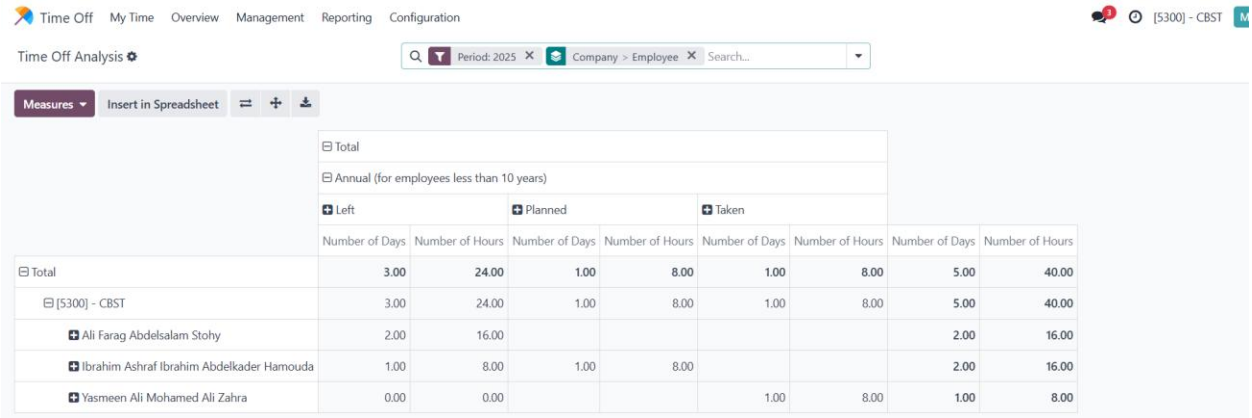


7. Reports and Balances

Go to Time Off → Reporting

See usage by employee or by type.

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



	Total							
	Annual (for employees less than 10 years)							
	Left		Planned		Taken			
	Number of Days	Number of Hours	Number of Days	Number of Hours	Number of Days	Number of Hours	Number of Days	Number of Hours
Total	3.00	24.00	1.00	8.00	1.00	8.00	5.00	40.00
[5300] - CBST	3.00	24.00	1.00	8.00	1.00	8.00	5.00	40.00
Ali Farag Abdelsalam Stohy	2.00	16.00					2.00	16.00
Ibrahim Ashraf Ibrahim Abdelkader Hamouda	1.00	8.00	1.00	8.00			2.00	16.00
Yasmeen Ali Mohamed Ali Zahra	0.00	0.00			1.00	8.00	1.00	8.00

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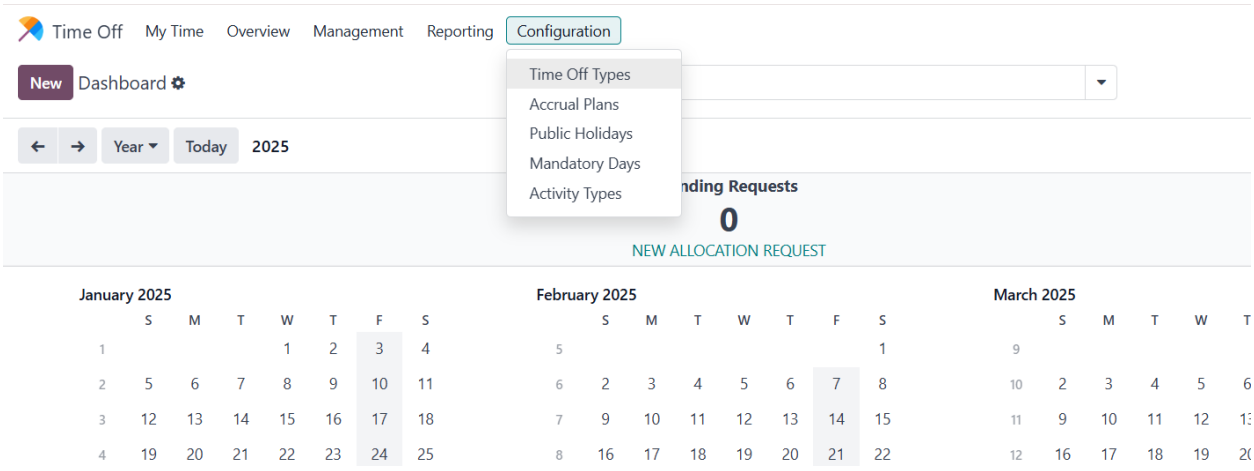
8. Configuration Options (for Admins)

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



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

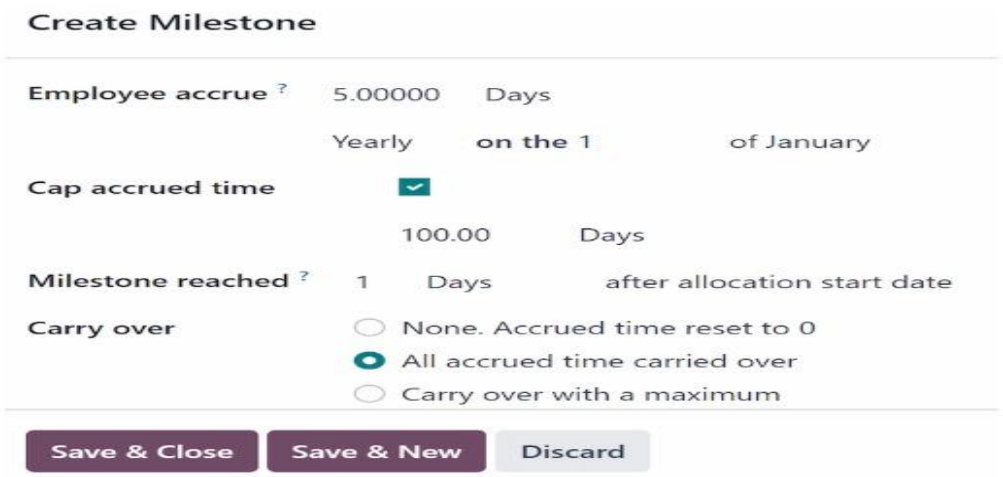
- Carry Over: Allows unused leave to carry forward

- 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



10.Steps to Upload Bulk Time Off Requests:

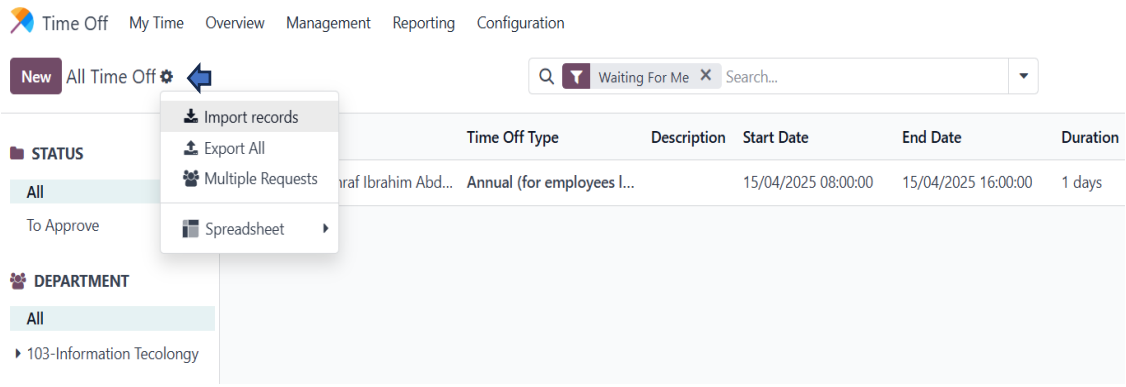
Step 1: Go to Time Off Requests

- 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



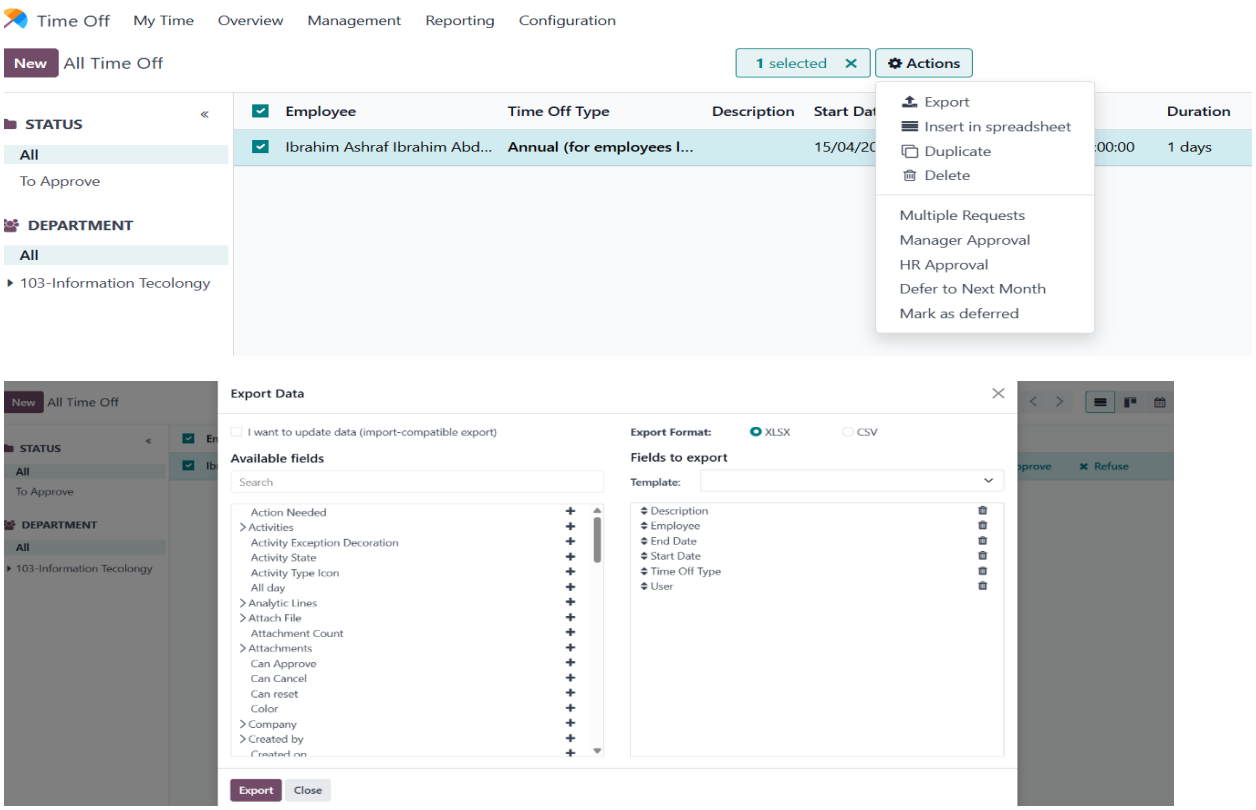
11.Steps to Upload Initial Balances:

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



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

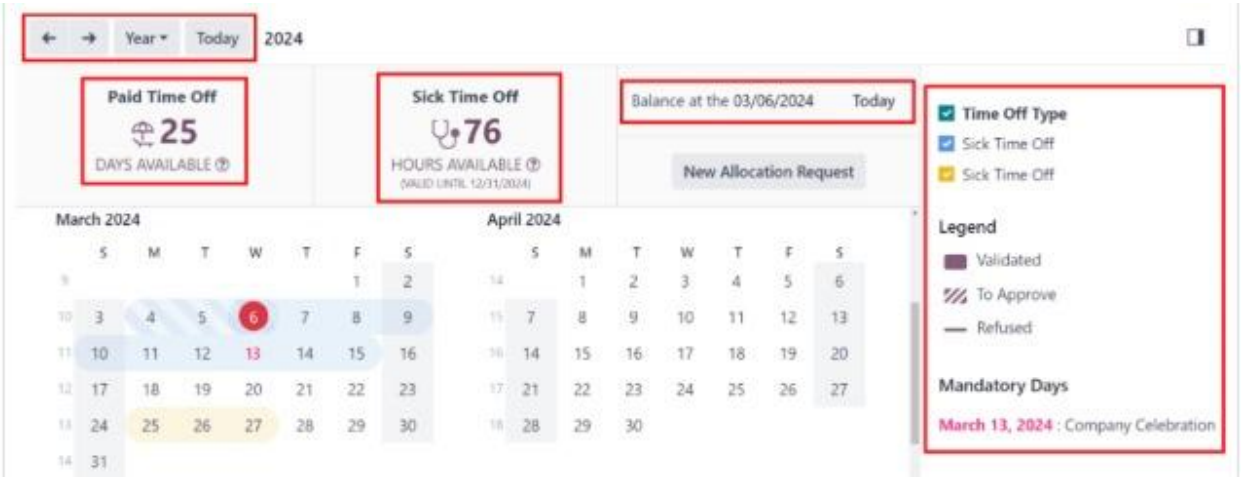
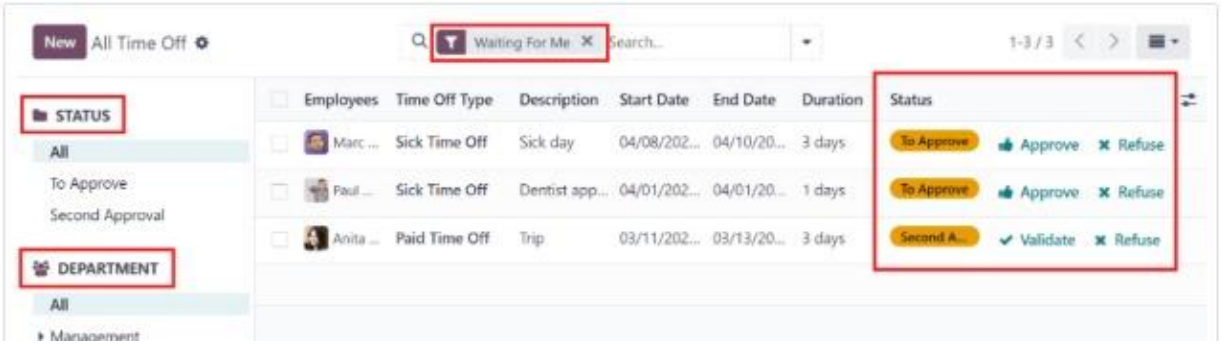
Step 3: Upload the File

- 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.