HR Module Training Material.

Process	Steps
Employee Records Setup: Create a centralized employee database with personal information, contact details, and employment history.	1. Navigate to Employee Module. 2. Add a new employee record. 3. Enter personal information, bank details, contact details, and employment history. 4. Save the record.
Employee Classification: Classify employees into categories such as full-time, part-time, contract, and temporary.	1. Navigate to Employee Contract menu. 2. Assign categories to employees. 3. Save the changes.
Document Management: Maintain and access employee documents like resumes, contracts, and certifications.	1. Navigate to Employee. 2. Upload employee documents. 3. Verify document accessibility.
Employee Contract: Create and manage employment contracts	1. Inside the employee profile, click on the Contracts tab. 2. Click the Create button to create a new contract
Fill in Contract Details	Fill in the following details for the contract: 1. Contract Reference: A unique reference for the contract. 2. Employee: This field will automatically be filled with the selected employee. 3. Department: Choose the department to which the employee belongs. 4. Job Position: Select the employee's job position. 5. Contract Type: Define the type of contract (e.g., Full-time, Part-time, etc.). 6. Working Schedule: Define the working schedule or hours. 7. Start Date & End Date: Enter the contract's start and end dates. 8. Trial Period: Define the trial period, if applicable. 9. Salary Structure: Choose the salary structure or define a new one. 10. Wage: Enter the wage details, whether it's monthly, weekly, or hourly. 11. Other Details: Include any additional terms, bonuses, or conditions.
Batch Payslip Generation	if you need to generate payslips for multiple employees: 1. Go to the Payroll module. 2. Navigate to Payslips > Batch Payslip. 3. Click Create to define the batch payslip. 4. Select the Period and Employees. 5. Confirm the batch payslip to generate individual payslips for each employee in the batch.
Post and Pay Salaries	1. Once all payslips are generated and confirmed, you can post them to the accounting module. 2. Navigate to Payroll > Payslips. 3. Select the payslips you want to post and click Post Entries. 4. If the accounting module is integrated, Odoo will create the necessary journal entries.
Generate Payroll Reports	1. To generate payroll reports: 2. Go to Payroll > Reporting > Payslip Reports. 3. Select the date range and other filters to generate reports like: a. Payroll Summary b. Salary Register c. Salary WPS report

Configure Leave Types	1. Before allocating leave, you need to configure the leave types. 2. Go to the Time Off module. 3. Navigate to Configuration > Time Off Types. 4. Click Create to define a new leave type or edit an existing one. a. Leave Type Name: Name the leave type (e.g., Annual Leave, Sick Leave). b. Validity Period: Set the period during which the leave can be taken. c. Allocation Method: Define whether the leave is allocated manually or automatically (based on policies). d. Leave Validation: Set who is responsible for approving the leave (e.g., Manager, HR). e. Accrual: If applicable, configure accrual rules for leave (e.g., 2 days per month).
Allocate Leave to Employees	1. You can allocate leave to individual employees or groups. A. Individual Leave Allocation 2. Go to the Time Off module. 3. Navigate to Time Off > Managers > Allocations. 4. Click Create. 5. Fill in the following details: A. Employee: Select the employee to whom you are allocating the leave. B. Time Off Type: Choose the leave type (e.g., Annual Leave). C. Duration: Specify the number of days or hours to allocate. D. Description: Optionally, provide a description or reason for the allocation. E. Allocation Mode: Choose between: i. Regular Allocation: Standard leave allocation. ii. Accrual: If the leave type accrues over time. 6.Click Save and then Confirm to finalize the allocation.
Managing Leave Requests	Once leave is allocated, employees can request leave: 1. Employees go to the Time Off module. 2. They select My Time Off > Request Time Off. 3. Choose the Leave Type and fill in the Dates and Duration. 4. Submit the request. Managers or HR can then approve or refuse the leave request.
Monitoring Leave Balances	To track leave balances and allocations: 1.Go to the Time Off module. 2.Navigate to Reporting > Time Off Summary. 3.View or export reports showing the leave balance, taken days, and remaining days for each employee.
Generate Garuity Report	To track leave balances and allocations: 1. Go to the Time Off module. 2. Navigate to Reporting > Time Off Summary. 3. View or export reports showing the leave balance, taken days, and remaining days for each employee.
Generate Leave Salary report	Generate Gratuity report 1. Go to the time off module. 2. Navigate to Reporting > Leave salary report. 3. Export reports showing the number of available annual leaves and eligible encashment amount.
Job Postings: Create and manage job postings and ensure they are visible on the company website and job boards.	1. Navigate to Job Postings. 2. Create a new job posting. 3. Verify visibility on company website and job boards.
Applicant Tracking: Track applicants from application to hiring, including scheduling interviews and maintaining interaction history.	1. Navigate to Applicant Tracking. 2. Track an applicant through the recruitment process. 3. Schedule interviews and maintain interaction history.

Onboarding Process: Streamline onboarding with checklists, documents, and automated account creation.	1. Navigate to Onboarding. 2. Complete onboarding checklist. 3. Create employee accounts and access rights. 4. Provide resources and information.
Offboarding Process: Manage offboarding tasks such as exit interviews and equipment returns.	1. Navigate to Offboarding. 2. Conduct exit interviews. 3. Manage equipment returns and access revocations.
Attendance Tracking: Track employee attendance using biometric devices, timesheets, or clock systems.	1. Navigate to Attendance Tracking. 2. Record attendance using biometric devices/timesheets/clock systems. 3. Verify accuracy of recorded attendance.
Performance Objectives: Define and align performance objectives with company goals.	1. Navigate to Performance Objectives. 2. Define and set objectives for employees. 3. Align objectives with company goals.
Performance Evaluations: Conduct regular performance evaluations and provide feedback.	1. Navigate to Performance Evaluations. 2. Conduct evaluations and appraisals. 3. Provide feedback and development plans.
Training Programs: Create and assign training programs and track progress.	1. Navigate to Training Programs. 2. Create new training programs. 3. Assign courses to employees. 4. Track progress and completion.
Self-Service Portals: Provide employees access to update personal info, benefits, and submit requests.	1. Navigate to Self-Service Portals. 2. Access personal info, benefits, and request submission. 3. Verify functionality of portal features.
Accounting Integration: Sync payroll data with accounting systems.	1. Navigate to Accounting Integration. 2. Sync payroll data with accounting systems. 3. Verify accuracy of financial data.
Task Assignment: Assign tasks based on employee availability and status.	1. Navigate to Task Assignment. 2. Assign tasks considering employee availability. 3. Verify task allocation efficiency.
Approval Matrix: Define and adjust an approval matrix for HR processes.	1. Navigate to Approval Matrix. 2. Define and configure the approval matrix. 3. Verify matrix functionality in HR processes.
Training Management: Track and manage employee training activities accurately.	1. Navigate to Training Management. 2. Track training activities and completions. 3. Verify training records and progress.
Cross-Functional Goals and KPIs: Define and track cross-functional goals and KPIs.	1. Navigate to Goals and KPIs. 2. Define and set cross-functional goals. 3. Track and review KPIs.
Task Assignment: Assign tasks based on employee availability and status.	1. Navigate to Task Assignment. 2. Assign tasks considering employee availability. 3. Verify task allocation efficiency.
Performance Analytics: Analyze performance metrics and provide dashboards.	1. Navigate to Performance Analytics. 2. Analyze metrics such as productivity and engagement. 3. Generate dashboards and visualizations.