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	Kwantify Odoo - Off-Boarding		

Oddo


User Manual for Off-Boarding Module

Apr 29, 2021

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Revision History

Date	Version	Description	Author
29-Apr-2021	1.0	User Manual	Pipilika Kumari
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Off-Boarding USER MANUAL



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1 Introduction

Off-boarding is the process of formal separation between and Employee & Company through retirement, resignation or termination due to various reasons. The off-boarding process entails all that processes that takes place when any employee leaves the Organization including formal communication, Knowledge Transfer, Asset hand over & Exit formalities etc. The employee can apply or the authorized users can apply for off-boarding online and separate from the organization, following a formal off-boarding procedure.

1.1 Purpose

The purpose of this document is to give step-by step guidance to the end users on how to proceed with Off-boarding like applying resignation, retirement, followed by approval from respective RA, LM/ULM, and clearance from Admin, IT, Finance department and Human Resource Department in the organization. The system facilitates admin user in configuration of the Off-Boarding Type, Off-Boarding Reason, Duration, Groups, and Grades.


2 Off-boarding

This module guides the users on how to apply Off-boarding for self-followed by its approval process and getting clearance from various departments in order to end the service. The interested employees can send a resignation request, or the manager can terminate an employee, or cancel the service due to demise. Retirement can be requested in case the employee is 60+ years of age in the portal itself. Here, the employee and managers also have the option to cancel the request, by following the process of cancellation. On approval, the employee follows the EOS procedure and gets clearance from various departments. The HRD makes the final approval and employee is released from company's term of service.

2.1 Access to the Portal/Kwantify

Access to the Off-boarding module can be done through standard login to the Portal/Kwantify by using authorized user ID and password.

Enter the website URL and to display the following welcome screen. (Refer **Fig. 2-1**)-

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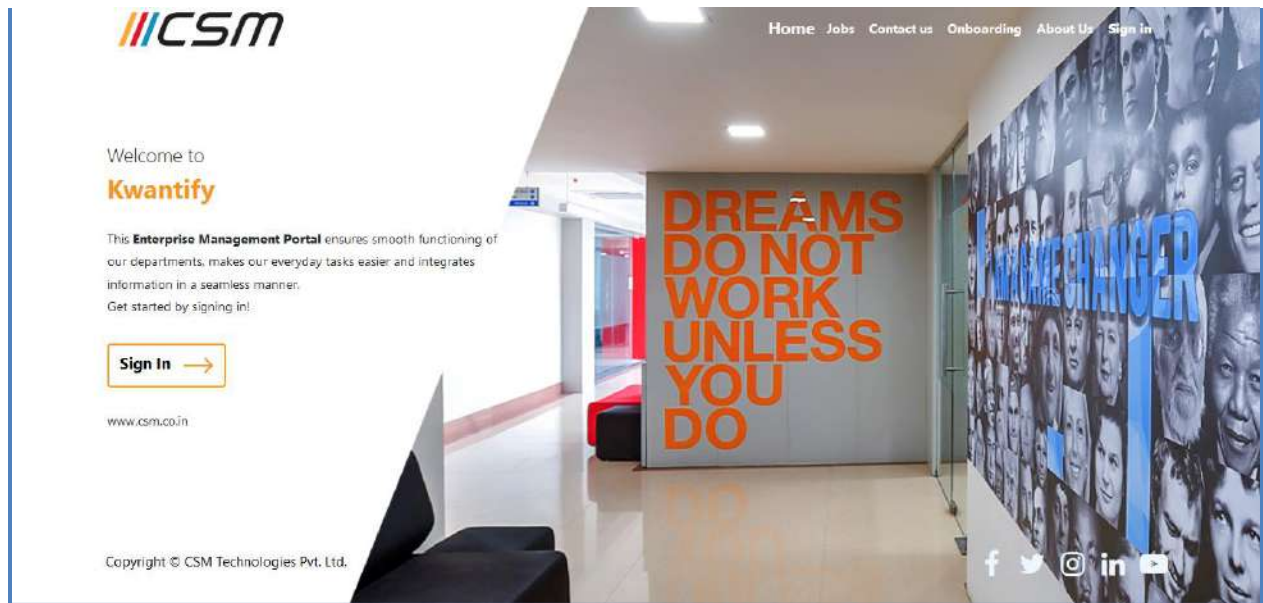


Figure 2-1 Welcome Screen

Click the **Sign-In** button to login into the system and use the different links available to apply for the Off-boarding and configure its components.

On Sign In, you are redirected to the following login screen, refer **Fig. 2-2**:

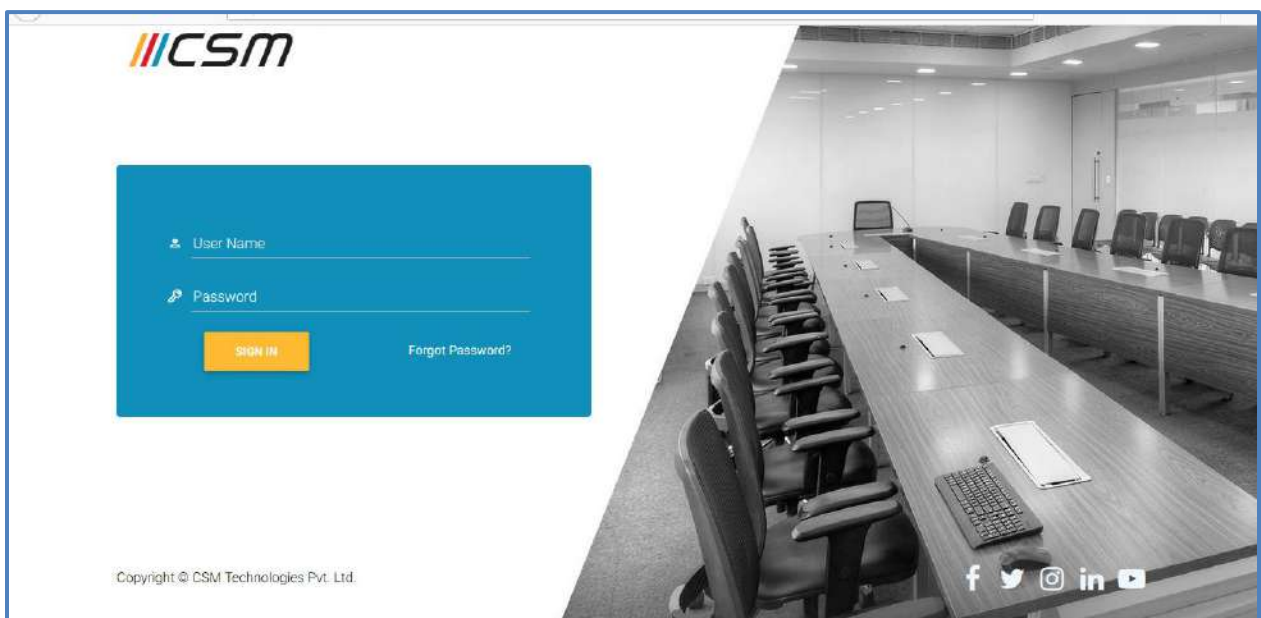



Figure 2-2 Login Screen

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- Enter the User Name and Password in the textbox provided.
- Click on **SIGN IN** button.

On successful login, user is redirected to the **My Office Time** screen as shown below.

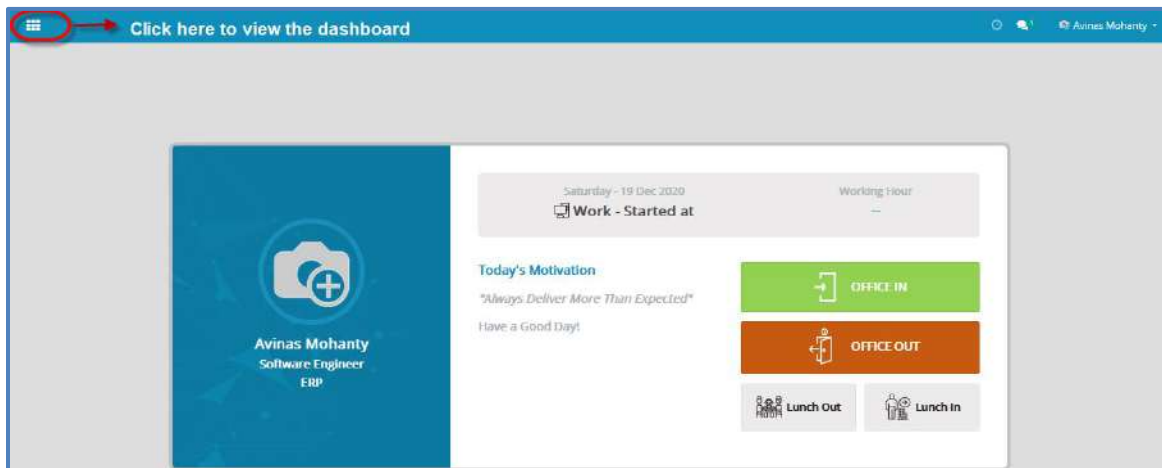


Figure 2-3 My Office Time Screen

- Click on the menu icon encircled in red in screen shared above to view the dashboard of the portal.

2.2 Forgot Password

In case the login user forgets his/her password, then click the Forgot Password option which further redirects you to the **Fig. 2-4**:

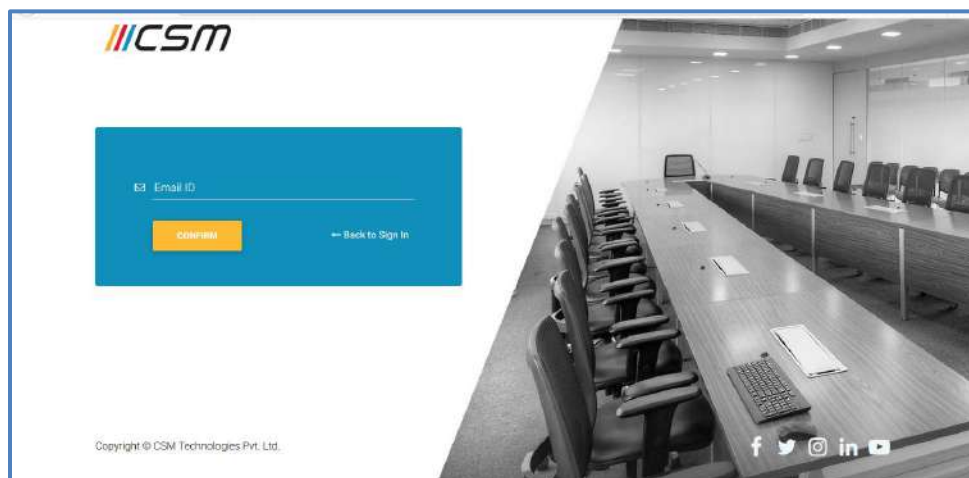



Figure 2-4 Forgot Password

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- Enter the registered Email ID in the textbox given,
- Click the **CONFIRM** button.
- Doing so, a mail is communicated to the login user through the email address provided wherein the user gets the option to reset the password.
- On re-setting the password, go back to the login screen, enter the credentials and Sign In.

3 Employee – Apply Resignation

If an employee is not willing to continue his/her services in the organization further, then the Off-Boarding module allows the user to apply for resignation and get it approved by respective line manager by following process “**Apply-> Approval-> Grant-> EOS -> Clearance**”. The Off-boarding module allows the employee to apply resignation for self, and authorized managers can apply for self as well as others.

To begin with the process, login into the application with User ID and Password of the login user to land into the menu screen (Refer **Fig. 2-5**). On clicking the Off-boarding menu, the page land into the following **Apply Off-boarding** screen, refer **Fig. 3-1**:

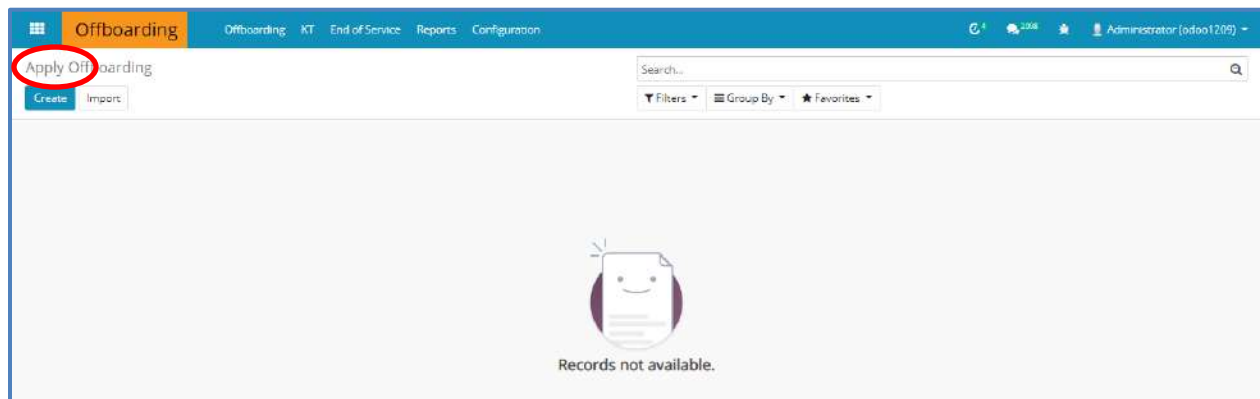



Figure 3-5 Off-boarding Screen

Referring to **Fig. 3-1**, in order to apply an Off-boarding request user to click on **Create** button.

Take reference from the screen shared below.

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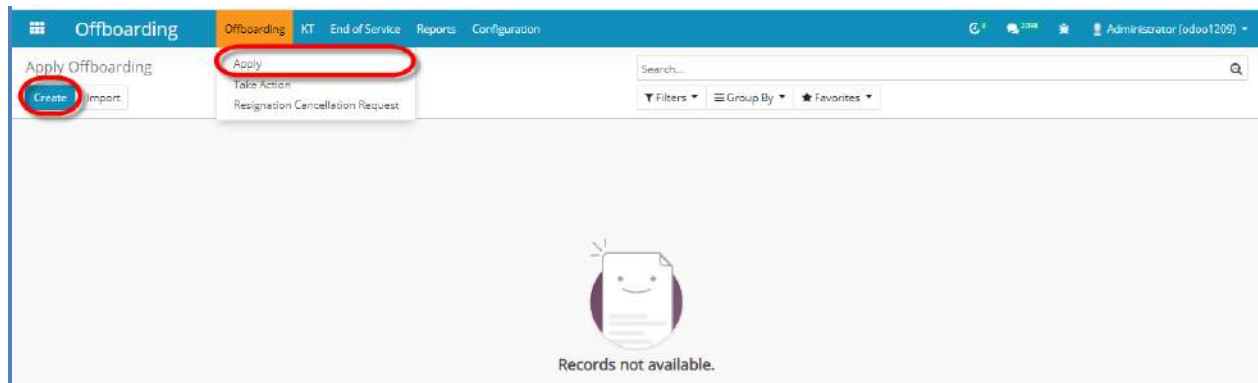


Figure 3-6 Apply Off-boarding Screen

On Clicking the **Create/Apply** button “apply for off-boarding screen will be shown to the user”, where user can apply for resignation by clicking on “**Save**” Button, then the application will go to line manager for approval.

Referring to the screen shared below.

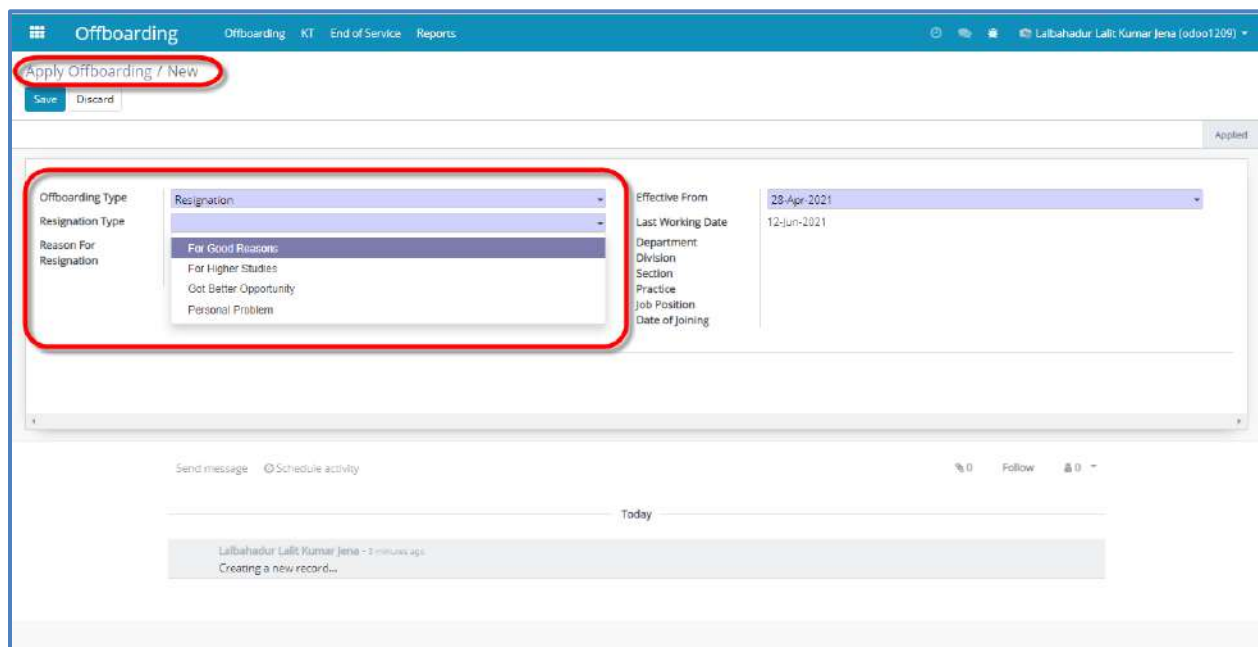



Figure 3-7 Apply Off-boarding Screen

To apply in the screen shown above,

- Select the off-boarding type.
- Select the Resignation type.

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- Select the reason for resignation from pre-configured data.
- Enter the Date, from when the resignation is effective.

Note: The last day of working will populate as per the employee grade and band configured in the application.

- Click the **Save** button.

On clicking, the Off-boarding request is submitted successfully.

The respective line manager, HOD, and HRD will receive a notification regarding the resignation request.

4 Employee –Resignation Cancellation

The portal allows the applicants to cancel any resignation request, in case the application requested is applied without proper consent and decision.

Whenever the application is not valid and the employee wants to cancel, go to the apply section under Off-boarding module and click on the Cancel Resignation button for the respective record in the list. The employee has the option to cancel RL before EOS grant, once EOS is granted then RL cancellation option will not be visible.

Refer to the screen shared below.

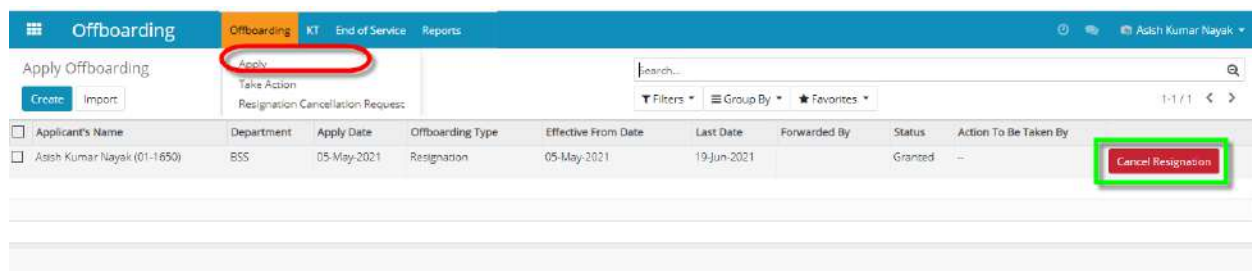



Figure 4-8 Employee – Cancel Resignation Screen

Click on the **Cancel Resignation** button and get redirected to the remarks screen, where a reason for cancellation needs to be submitted for the action taken.

Refer to the screen shared below.

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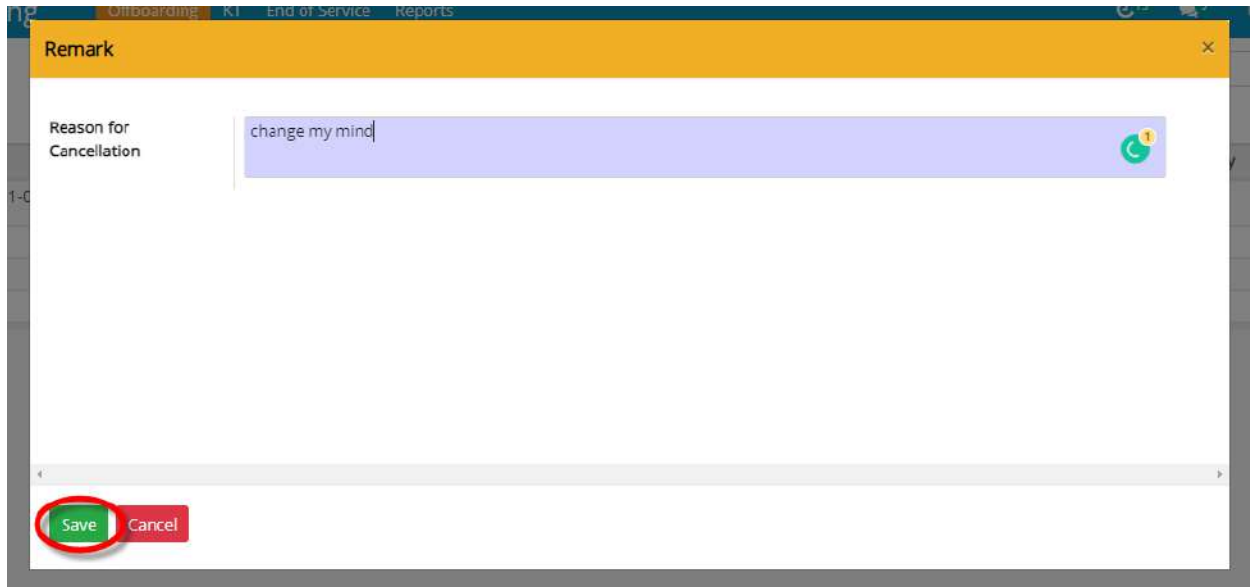


Figure 4-9 Employee – Add Cancellation Remarks Screen

- Enter the Reason for Cancellation of the resignation request in the space provided.
- Click the **Save** button.


On saving, the request moves to the respective line manager for approval.

4.1 Manager – Resignation Cancellation Request

The line manager has the authorization to accept or cancel any resignation cancellation request, sent by the applicant for approval. The LM/ULM can view the application under Resignation Cancellation Request (displayed after expansion of the Off-boarding link in the header section) and take action against the same.

For taking action, login into the portal and go to the apply screen off-boarding menu link.

Refer to the screen shared below.

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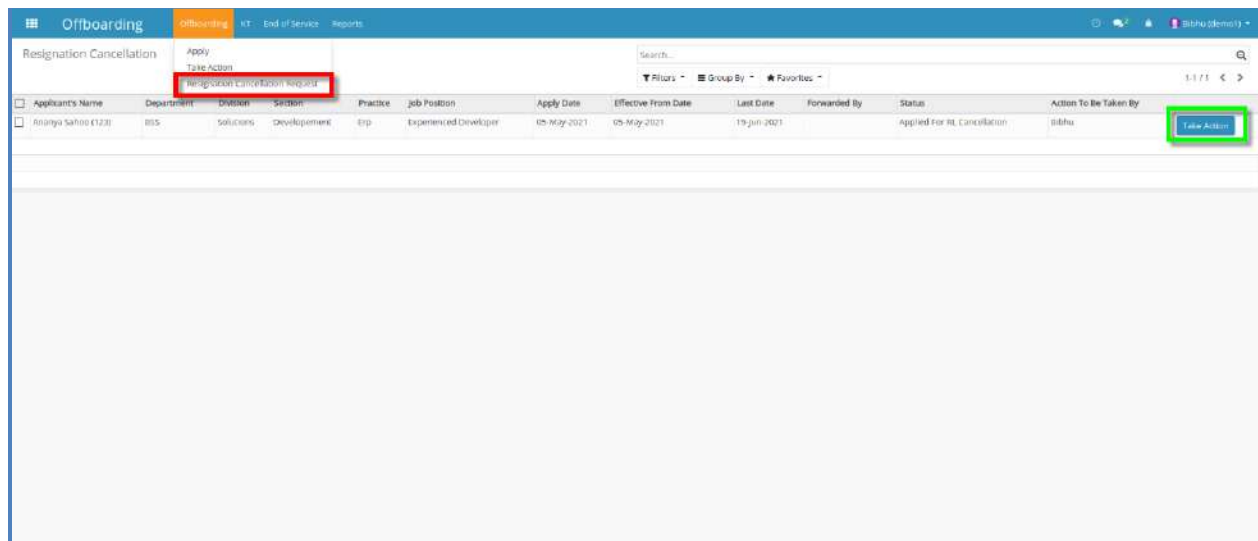


Figure 4-10 Resignation Cancellation Request – Manager Screen

Click on the **Take Action** button, as highlighted in the above screen in order to approve or reject the cancellation request.

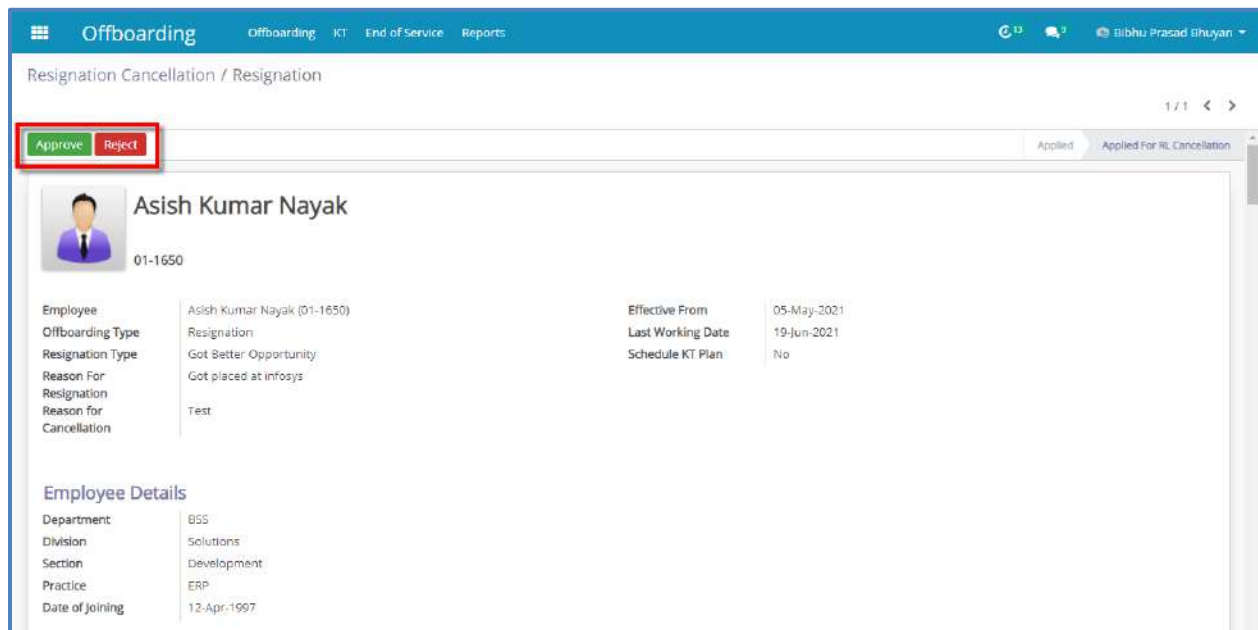



Figure 4-11 Resignation Cancellation Take Action Screen

Herein, the application details are provided i.e. applicant name, Off-boarding type, along with reason for resignation and cancellation of request.

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- To approve the Cancellation Request applied, click the **Approve** button for the respective record.
 - Or, for cancellation of the request click the **Reject** button.

On successful approval, the applied RL is cancelled.

5 Resignation Approval

A Resignation applied needs approval from various RA/LM/ULM and HR manager. In this section, complete approval process is explained with action to be taken by the respective authorities, Scheduling KT session, EOS, Feedback Submission and Clearance.

5.1 Line Manager – Take Action against Resignation Request

The Line Manager is authorized to take an action against pending Off-boarding request, i.e. either Approve or Reject the same, or Forward the request depending upon the applicant's reason for request.

To take action, the respective line manager shall login in in the portal using User ID and Password. Go to **Login>>Dashboard>> Off-boarding>>Take Action**.

On selecting the **Take Action**, the respective user will be redirected to the **respective** screen (referring to **Fig 5-1**).

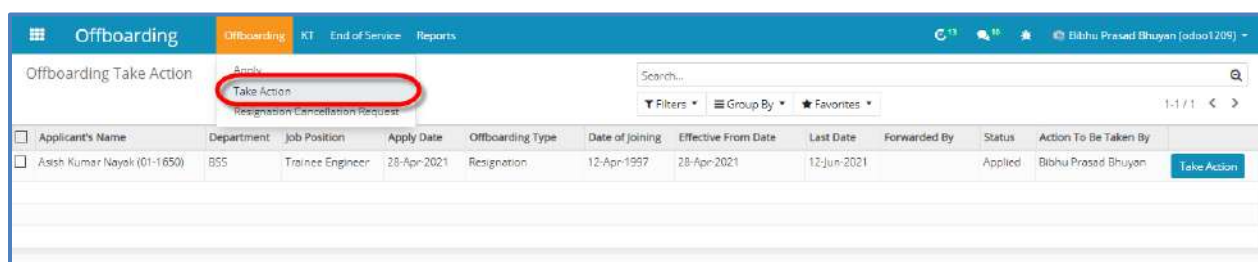



Figure 5-1 Take Action Off-Boarding Screen

Here all the Off-boarding requests pending for an action are displayed along with applicant's name, department, and job position; apply date, Off-boarding type, date of joining, effective from date, last date, current status and action to be taken by the authority name.

To approve or reject the request, click the **Take action** button for the respective record and line manager will be redirected to the below screen.

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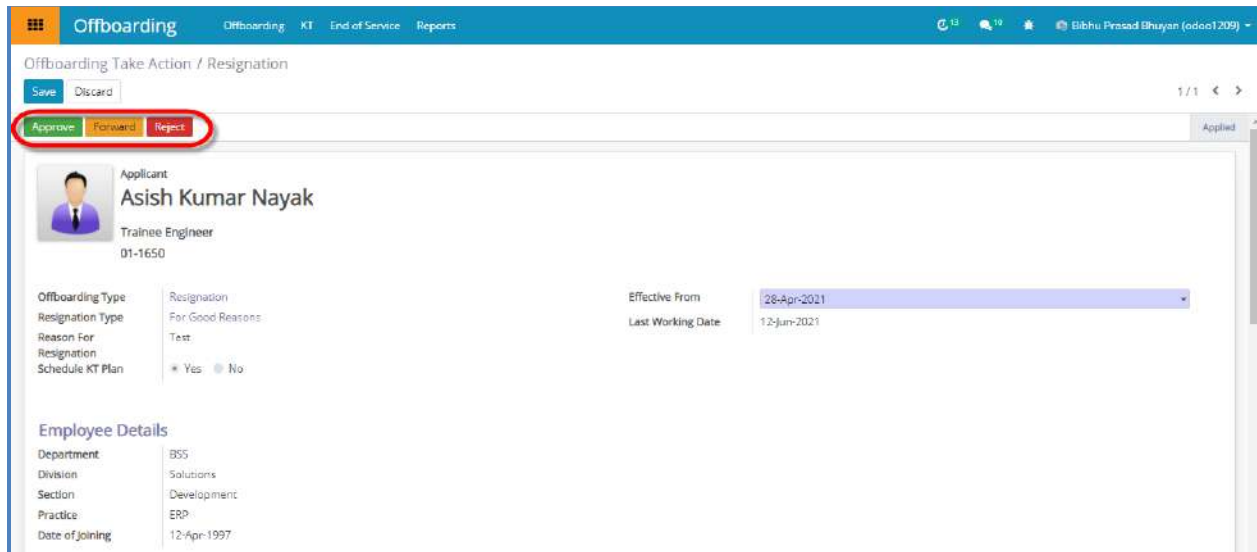


Figure 5-2 Take Action Off-Boarding Resignation Screen


Referring to the take action screen, here the employee name, designation, photograph, employee code is displayed with type of Off-boarding, resignation type, reason for resignation and other details.

Note:

The line manager has the authority to Approve/Reject/ or Forward the application, and change the dateline, for the notice period to be served by the employee.

The line manager can select the button either for Yes or No, if a KT session is required for transferring information regarding project or job role, or duties, etc., before the service period of the employee ends in the organization.

- ❖ In case the request needs an approval from other approving authority such as Functional Reporting Authority, then click the **Forward** button.
 - Select the authority to whom to forward followed by adding remarks for the same.
 - Click the **Save** button. The respective line manager shall take an action against the request and process the Off-boarding.
- ❖ If the Off-boarding request applied is not valid or the reason provided is not satisfactory, then the respective line manager can **Reject** the application by clicking the **Reject** button.

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- Add Remarks for the action taken.
 - Click the **Save** button.
- ❖ To approve the request, click on the **Approve** button,
- Add Remarks for the action taken.
 - Click the **Save** button. Refer to the screen shared below.

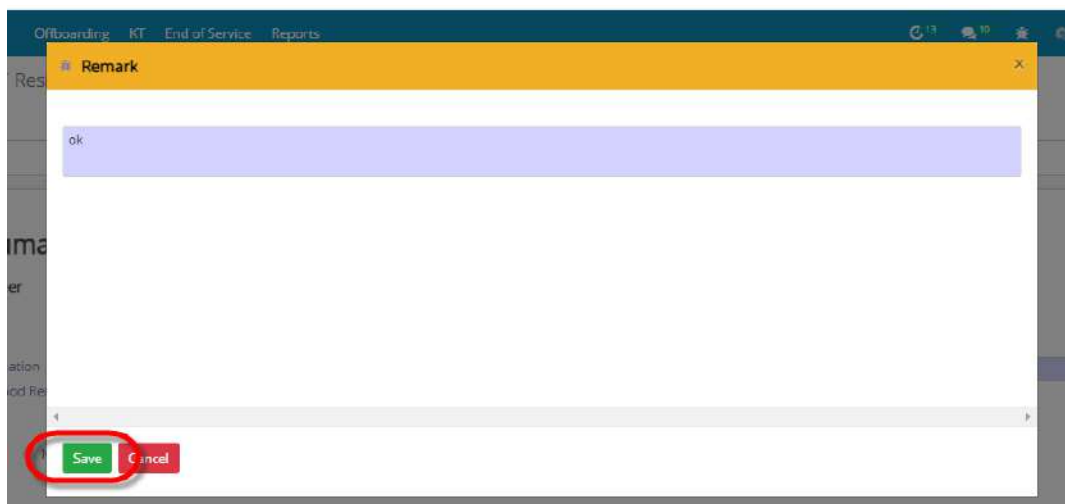


Figure 5.3 Add Remarks for Approval Screen

Once the application is approved by the line manager it will again forwarded to HOD for final Grant.

5.2 HOD/SBU Representative – Approve Final Grant for Resignation Request

For final grant of the Off-boarding request, the HOD has to login into the portal.

Follow the path **Login>>Dashboard>>Off-Boarding>>Off-Boarding menu link>> Take Action** and get redirected to the respective screen.

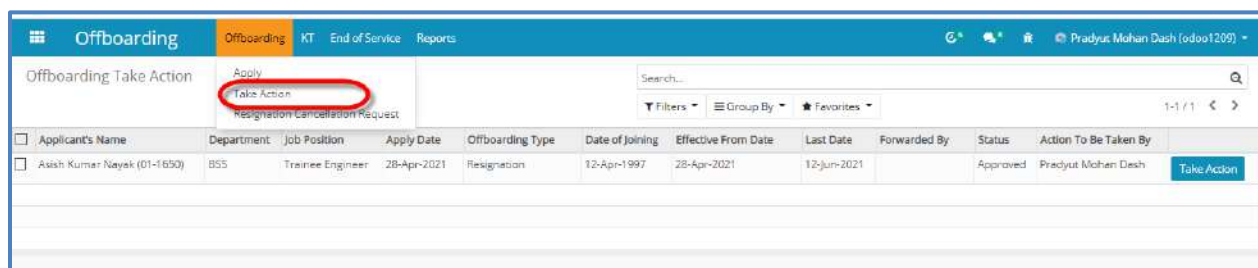



Figure 5-4 HOD Take Action – Final Grant Screen

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Referring to the **Fig. 5-4**, List of application pending for an action at HOD user end is shown with applicant name, department, Off-boarding type, current status, last action taking authority and action to be taken by authority name.

For further take action, HOD needs to click the **Take Action** button for the respective record and get redirected to the respective screen.

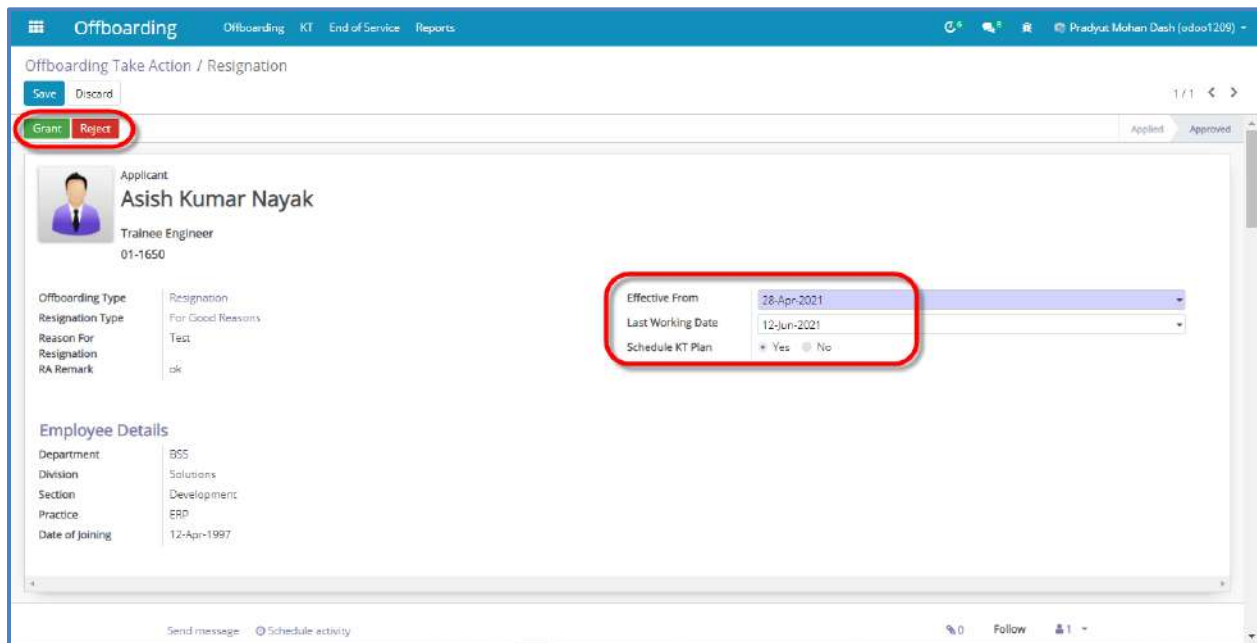


Figure 5-5 Off-Boarding Take Action - HOD Screen

In the screen above, all the information about the application and applicant are provided in detail.


HOD shall Grant or Reject the application and can change effective from date and schedule KT, here (referring to the above screen).

After Final Grant of the application, a KT record will be generated automatically where user has to prepare proposed KT plan and send to line manager for approval.

Or, Applicant can go to KT module directly in the dashboard.

5.3 Employee – KT Session Planning

The KT or Knowledge Transfer is a separate module, which allow users to access and request KT meetings to peers or subordinates, in case the employee has resigned from the

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job, or has been promoted to another designation, transferred, or handling a project to other team, training, etc.

If KT session has been requested by the Line Manager or HOD, KT record will automatically generated in KT module, the employee user has to login into the portal, apply for a KT Plan and send to line manager for approval.

Note: The user who have applied for the resignation cannot create a KT session. After the grant of the resignation, the KT is created automatically for the user in the application.


Path – Login>>Dashboard>>Knowledge Transfer>>KT, Or Login>>Dashboard>>Off-Boarding>>KT

User can go to KT module directly by clicking the **KT** link in Off-boarding module or can access KT module from the main menu.

Refer to the screen shared below.



Figure 5-6 KT Screen

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On clicking, the user will be redirected to the respective screen to KT Application screen.

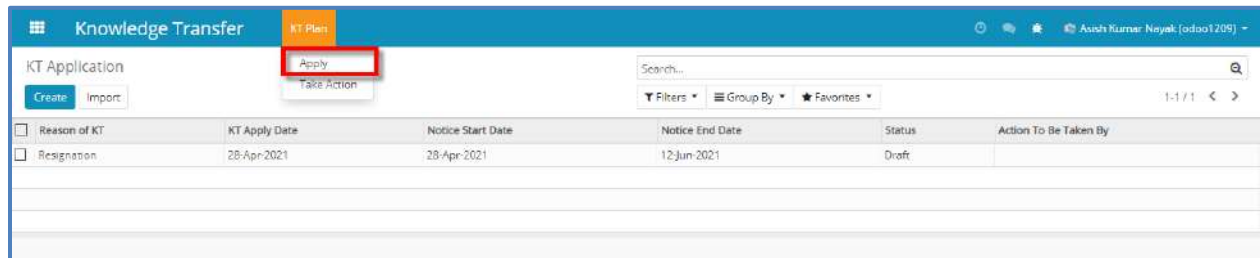


Figure 5-7 KT Plan – Apply Screen

- To create a new KT plan, click the **KT Plan** link in header menu to view the apply button.
- Click the **Apply/Create** button and get redirected to the respective screen.

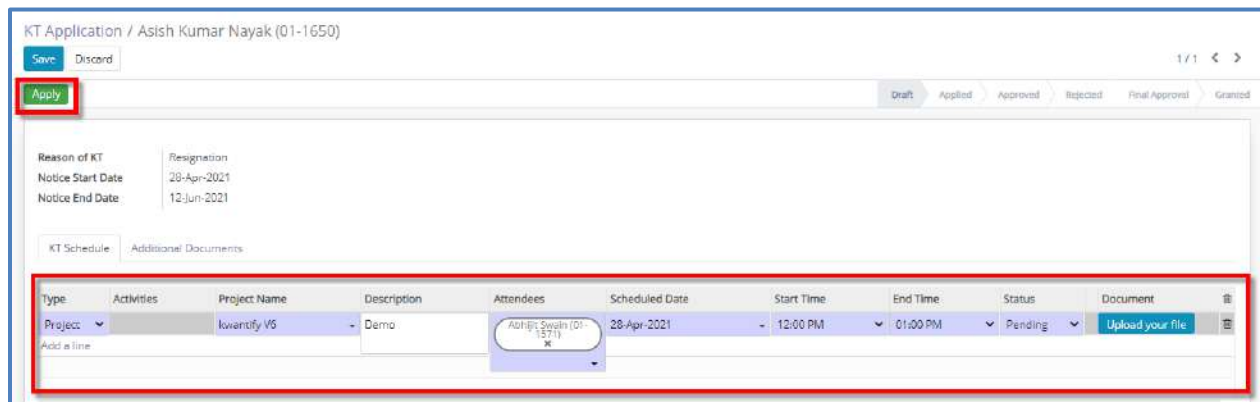



Figure 5-8 KT Application Screen

Here, information about the Reasons for KT, notice period dateline are provided.

To apply for KT session, scroll down to the KT Schedule and add details

- Select the Type of KT to be provided.
- Enter the Activity names.
- Select the Project Name.
- Enter Description if any.
- Enter the Attendees names. To add more attendees in the meeting, click the Add a Line link
- Enter the Scheduled Date, Start Time and End Time of the meeting, followed by the current status.

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- Upload Document if any by choosing the file from your system.
- Click the **Apply** button.

Note: The RA/HOD (Reporting Authority) will decide whether the respective user to provide the KT session after resignation and further KT record is created automatically.

On clicking the apply button, the KT plan is prepared and sent to the respective line manager for approval.

5.4 Manager – KT Plan Approval

The Line Manager is authorized to take action i.e. either “**Approve**” or “**Reject**” any KT plan request, or “**Modify**”, sent by the employee for approval. Once the KT plan is approved, the employee can conduct the KT and update the status on completion of the same.


To do so, the line manager needs to login into the portal using respective user Id and password and get redirected on the dashboard page.

Line Manager can access the KT module by clicking the **Knowledge Transfer** Icon in main menu.



Figure 5-9 KT Plan Approval – Manager Screen

On clicking the respective icon, user is redirected to the KT screen.

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Click the **KT Plan** to apply or view the take action screen. Refer to the screen shared below.

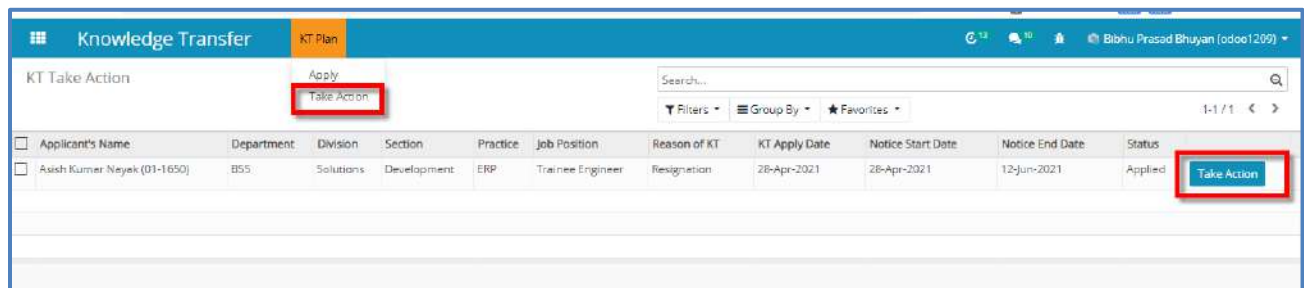


Figure 5-10 KT Plan – Take Action Screen

Refer **Fig 5-10**, click the **Take Action** to view a list of application where line manager needs to take action.

To either Approve or Reject KT plan, click the **Take Action** button for the respective record and get redirected to the respective screen.

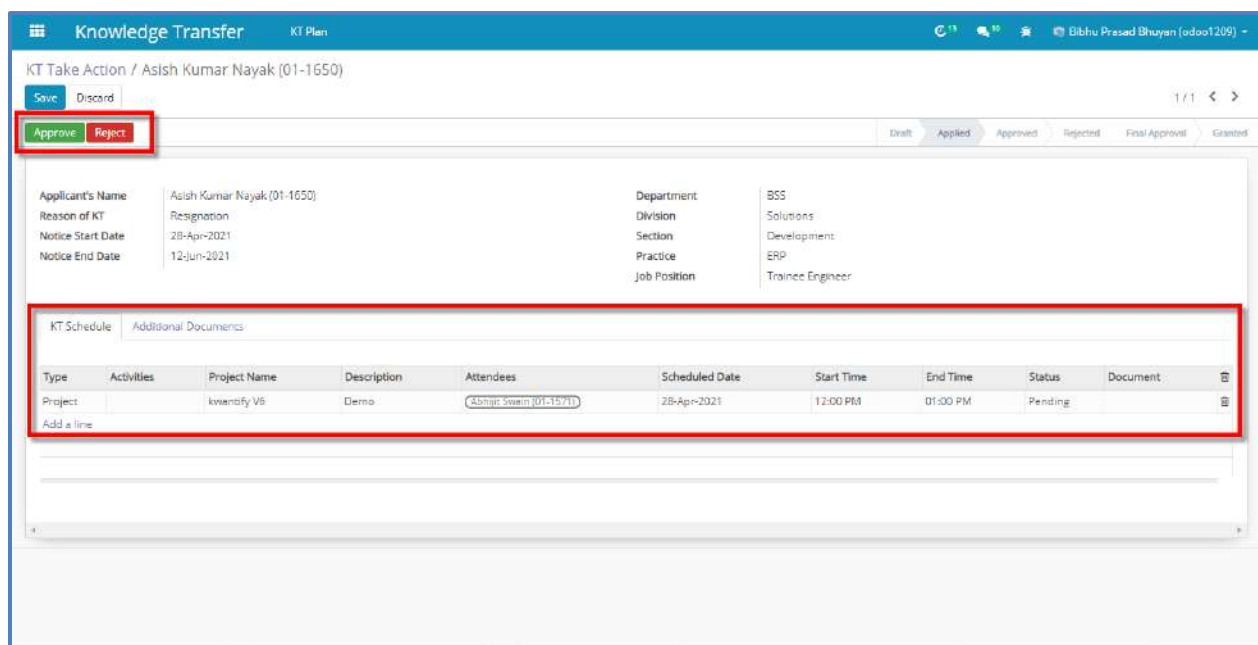



Figure 5-11 KT Take Action – Manager Screen

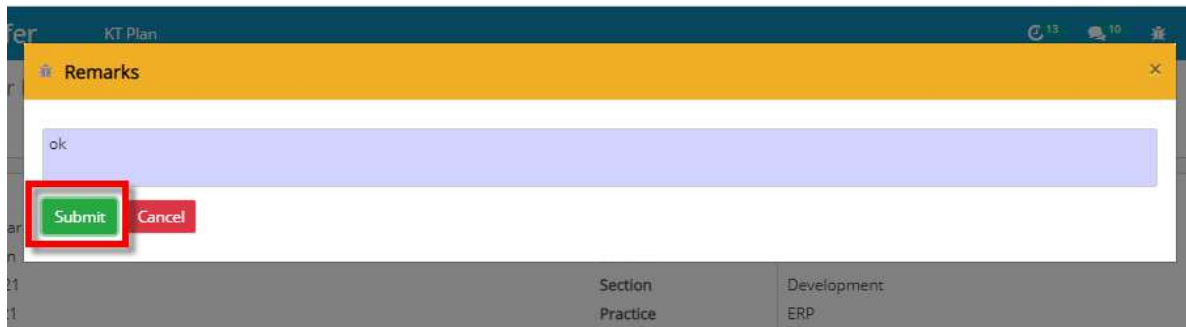
The respective applicant's Plan details are provided in the screen shown above.

The line manager is authorized to make any changes in the requested plan, like add new members, update meeting time, etc.

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For approval of the KT plan, the user needs to click on the Approve button and get redirected to the pop-up screen where remarks should be submitted for the action taken.

Refer to the below screen.



The screenshot shows a web application interface. At the top, there's a header bar with 'KT Plan' and some icons. Below it, a yellow banner reads 'Remarks'. Underneath the banner is a large light blue text input area containing the text 'ok'. At the bottom of the input area are two buttons: a green 'Submit' button and a red 'Cancel' button. The 'Submit' button is highlighted with a red rectangular box. Below the input area, there's a table with two columns: 'Section' and 'Development'. The 'Section' column has the value 'Practice' and the 'Development' column has the value 'ERP'.


Figure 5-12 Approved KT- Remarks Screen

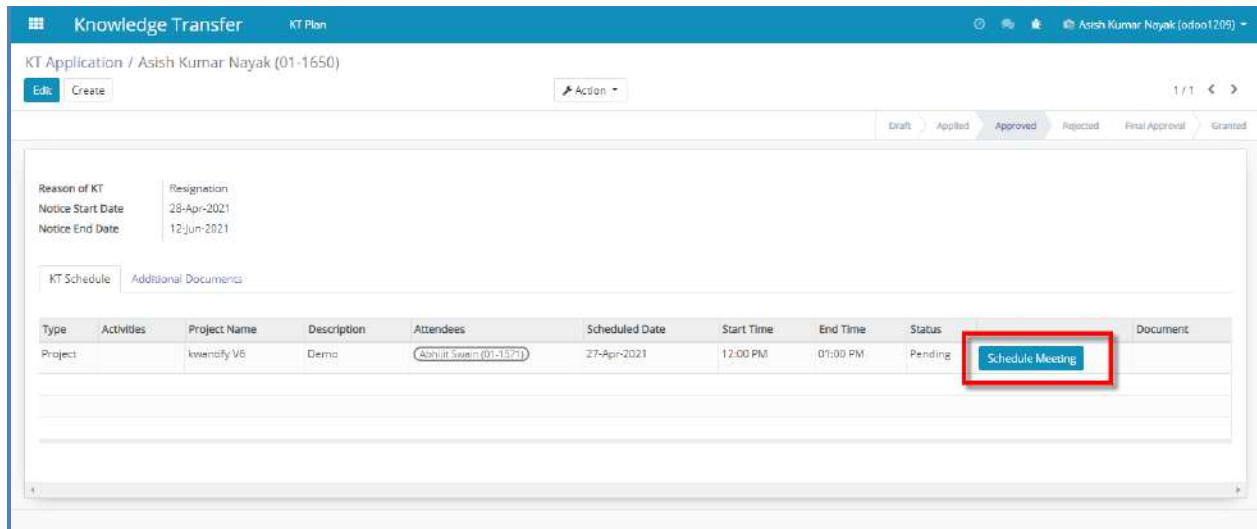
- Add remarks in the space provided and click on the **submit** button to save the same.

5.5 Employee – Schedule Meeting

Once the application is approved by line manager, a schedule meeting link will be displayed under the KT Plan section of KT module where the applicant can schedule meetings as per the approved scheduled KT plan.

To schedule the meeting, login into the portal using respective user ID and password. Go to **Dashboard>>Knowledge Transfer>> KT Plan**. The user will be redirected to the screen displayed below.

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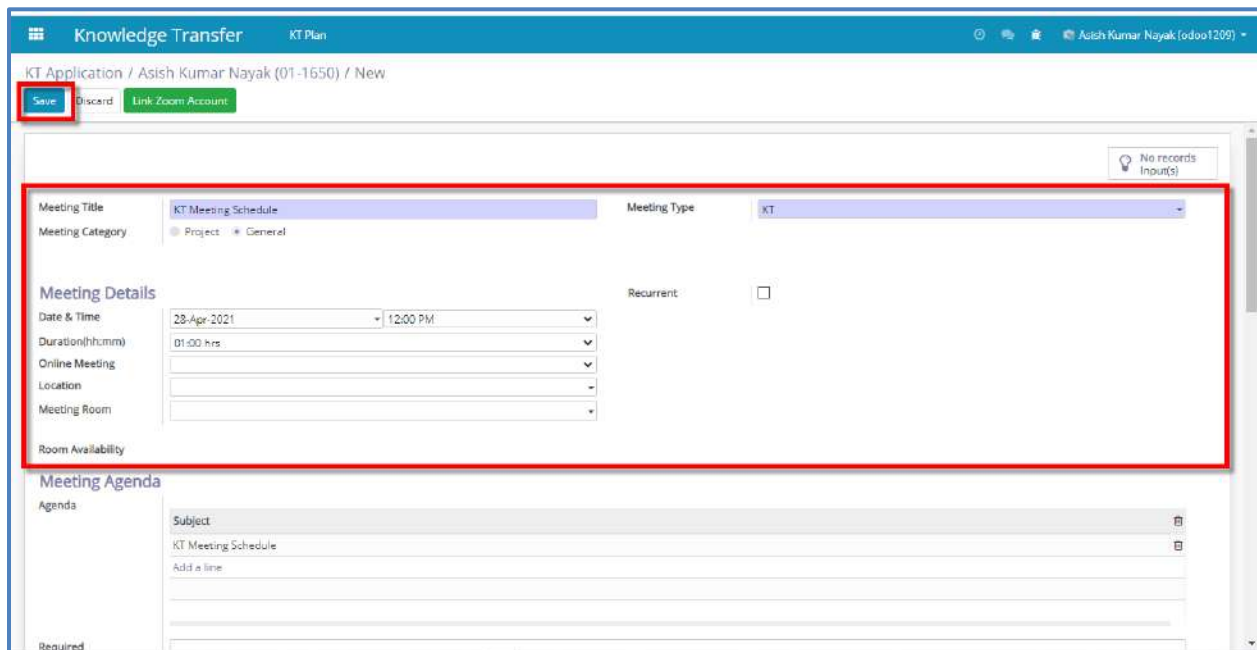


Type	Activities	Project Name	Description	Attendees	Scheduled Date	Start Time	End Time	Status	Document
Project		Kwantify V6	Demo	Abhinit Sushin (01-1571)	27-Apr-2021	12:00 PM	01:00 PM	Pending	

Figure 5-13 KT Application – Schedule Meeting Screen

In the above screen, i.e. **Fig 5-13** the KT Plan details are provided along with KT type, activities, project name, etc., and linked to schedule meeting module.

On clicking of schedule Meeting link, meeting schedule page will pop up with auto populated data as per the approved KT plan.



Meeting Title	Meeting Category	Meeting Type
KT Meeting Schedule	Project	KT

Meeting Details

Date & Time: 28-Apr-2021 12:00 PM

Duration(h:mm): 01:00 hrs

Online Meeting: ☒

Location:

Meeting Room:


Room Availability:

Meeting Agenda

Agenda:

- Subject: KT Meeting Schedule
- Add a line:

Figure 5-14 KT Application – Add Meeting Details Screen

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Modify the meeting details or meeting agenda and update the same by clicking the save button.

Note: Applicant can opt for meeting through online or offline mode, depending upon the availability.

Once KT session is over applicant has change the status of the application with an uploaded related document, then the applicant will apply for complete KT approval to line manager.

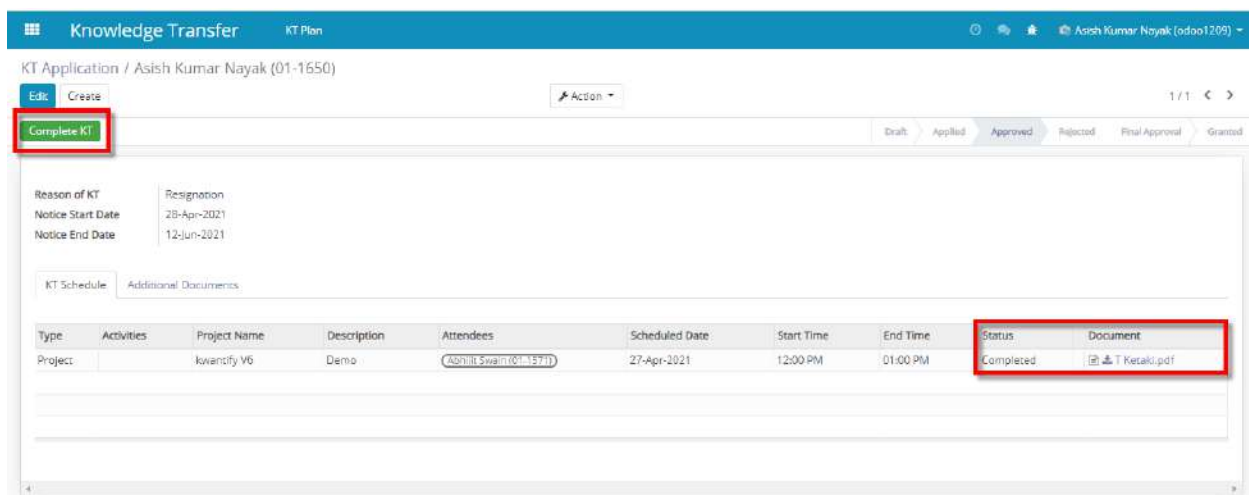


Figure 5-15 KT Application – Complete KT Screen


- Update the KT status followed by uploading a document for the same such as MoM of the meeting.
- Click on **Complete KT** button.

On submission, the request moves to the line manager for approval.

5.6 Manager – KT Completion Approval

The Line Manager can grant the application by clicking on grant button and put remarks and submit the application, after final approval of line manager KT will be completed.

To take action, login into the portal using respective user ID and password. Follow the path **Login>>Dashboard>>Knowledge Transfer>>KT Plan>>Take Action**. Refer to the **Fig 5-16** below.

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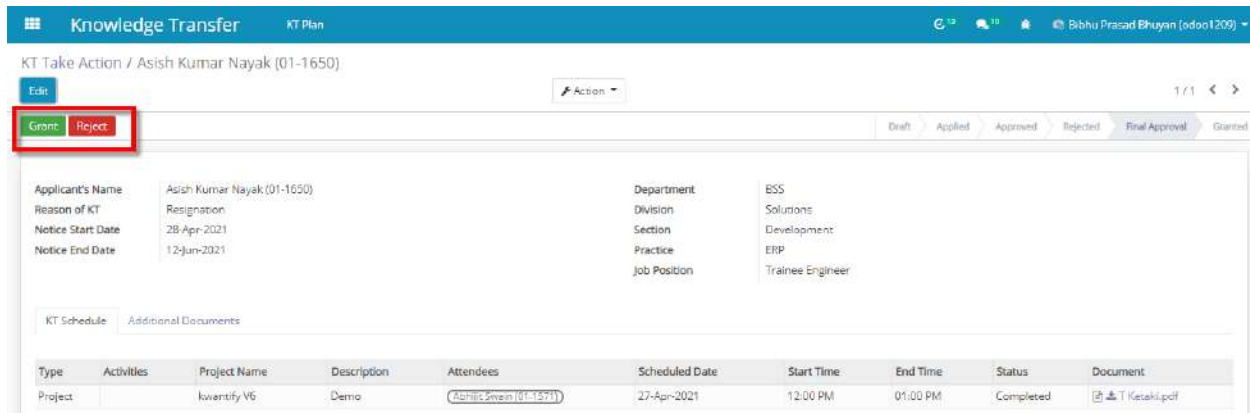


Figure 5-16 KT Grant – Manager Screen

In **KT Take Action** screen, the details of the KT Scheduled are provided with current status and document submitted by the employee in support of the same.

To grant the final approval of the KT Meeting, click on the grant button and get redirected to the pop-up screen displayed below.

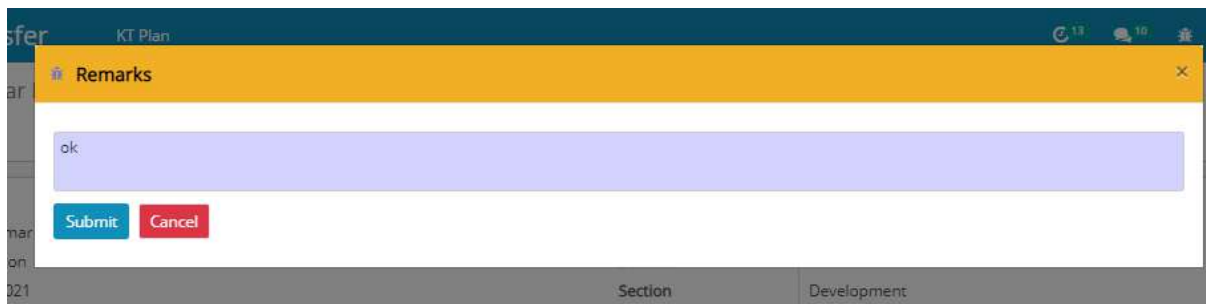



Figure 5-17 KT Granted – Add Remarks Screen

- Enter remarks for the action taken and click on Submit button.

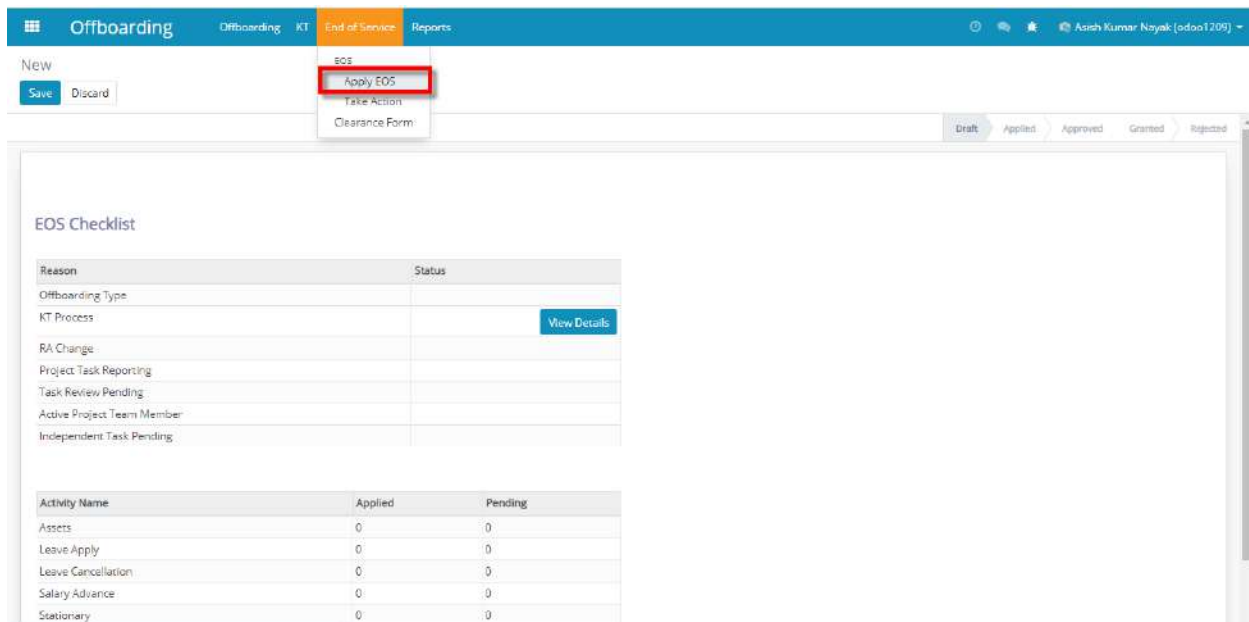
On submission, the application is approved finally and the user needs to precede with the End of Service processes.

5.7 Employee – Apply EOS (End of Service)

The End of Service or EOS process features a set of action i.e. completion of EOS checklist and updating activity list in the portal, after the Off-boarding request has been finally Grant by the HOD. The employee needs to complete the required details and then apply for EOS in the EOS section.

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	Kwantify Odoo - Off-Boarding		

For doing so, login in the portal. Go to **Login>>Dashboard>>Off-Boarding>> End of Service>>Apply EOS**. Click the link to view Apply EOS sub-menu link; Refers to the **Fig 5-18** shared below.




Reason	Status
Offboarding Type	
KT Process	
RA Change	
Project Task Reporting	
Task Review Pending	
Active Project Team Member	
Independent Task Pending	

Activity Name	Applied	Pending
Assets	0	0
Leave Apply	0	0
Leave Cancellation	0	0
Salary Advance	0	0
Stationary	0	0

Figure 5-18 End of Service Screen

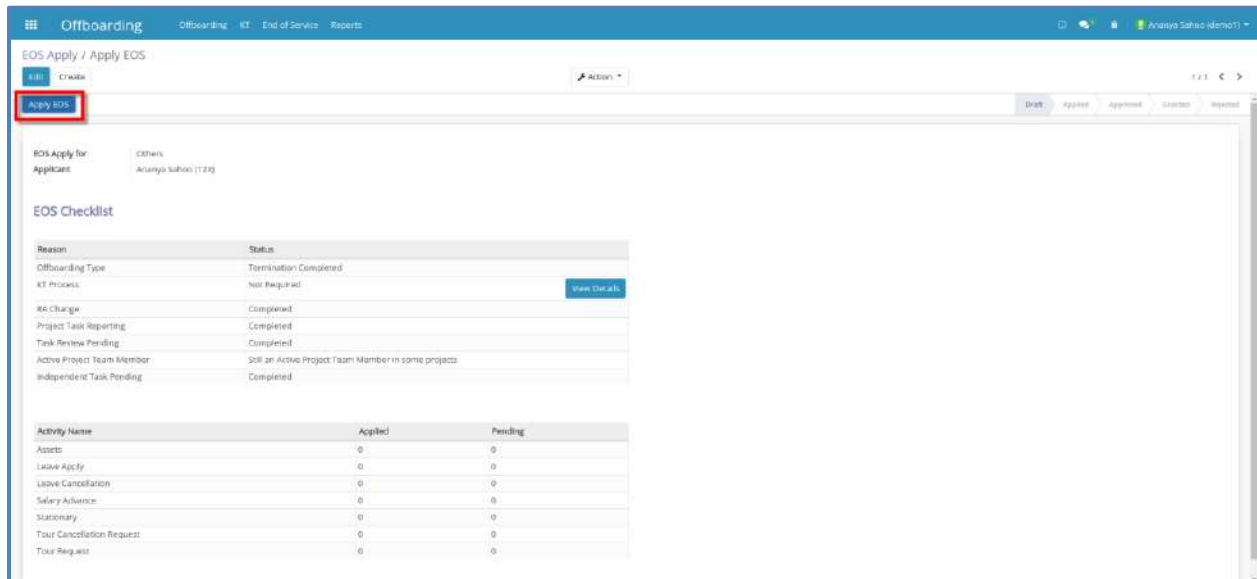
Click on the Apply EOS and get redirected to the above screen.

- Herein, EOS checklist is added on the basis of reasons for EOS and activities.
- On completion of each activity listed under the reasons, the status will automatically get updated states changed from **“Pending”** to **“Completed”**. If any of the reason is pending, the status section displays as Pending, once the task is completed, the status section changes automatically to completed.
 - If the Offboarding process is completed, the status displays as **Completed** or if it is in progress, it displays as **Pending**.
 - If the KT Approval process is completed, the status displays as **Completed** or if it is in progress, it displays as **Pending**.
 - If the user applied for Off-Boarding, the subordinates under the user to change their Line Manager or Reporting Authority (RA) by the HR Department. Until the RA is not changed, the status displays as **Pending** and if RA is changed, the status displays as **Completed**.
 - If any task assigned to the user is pending, the status displays as **Pending** and if the task assigned is completed, the status displays as **Completed**.

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	Kwantify Odoo - Off-Boarding		

- If the user is tagged in any project as active project team member and is not yet released, the status displays as ***Still an Active Project Team Member in some projects*** and if the user is untagged by all the projects, the status displays as ***Completed***.
- Similarly, if there is any activity like assets to be hand over, leave approval pending, leave cancellation approval pending, etc., then the total count of applied and pending requests will be displayed in the activity section.
- To apply for EOS, all the record status needs to be completed/zero i.e., cleared and updated.
- Also, to apply for EOS, all the applied and request pending against the activity name must be in zero.
- On completion of the checklist successfully, **Apply EOS** button will appear on the EOS Apply screen.

Referring the figure 5- 19 shown below.



The screenshot shows the 'EOS Apply / Apply EOS' interface. At the top, there's a navigation bar with 'Offboarding', 'IT', 'End of Service', and 'Reports'. Below it, the 'EOS Apply / Apply EOS' header is visible. A red box highlights the 'Apply EOS' button. The main content area includes an 'EOS Checklist' table and an 'Activity Name' table.


Reason	Status
Offboarding Type	Termination Completed
IT Process	Not Required
HR Change	Completed
Project Task Reporting	Completed
Task Review Pending	Completed
Active Project Team Member	Still an Active Project Team Member in some projects
Independent Task Pending	Completed

Activity Name	Applied	Pending
Assets	0	0
Leave Apply	0	0
Leave Cancellation	0	0
Salary Advance	0	0
Stationary	0	0
Tour Cancellation Request	0	0
Tour Request	0	0

Figure 5-19 Apply EOS Screen


Click on the **Apply EOS** button to apply the EOS.

When the applicant apply for EOS, an email notification is sent to Finance, IT, Admin, HR, RA for clearance.

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	Kwantify Odoo - Off-Boarding		

On clicking Apply EOS button, the “**Employee Feedback**” form i.e. a set of exit interview questionnaire appears on the screen, where the employee needs to submit feasible response against each question.

Refer to the screen shared below.

	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #:28 of 41
	Kwantify Odoo - Off-Boarding		

Offboarding

Offboarding KT End of Service Reports

Ananya Sahoo (demo)

New

Save Discard

Submit

Employee

Ananya Sahoo (123)

Designation

Experienced Developer

Department

BSS

Exit interview questions

1. What are the reasons for leaving?

2. Did dissatisfaction with any of the following factors influence your decision to leave?

Type of Work

Working Conditions (Setting, schedule, Travel, Flexibility)

Pay

Supervisor

Location

Cost of living in area

Additional Comments

Yes

No

Yes

No

Yes

No

Yes

No

Yes

No

3. Please rate the following aspects of the job you are vacating. (Use the 1-5 Scale below. 1-Very Poor, 2-Poor, 3-Average, 4-Good, 5-Excellent)

Type of work performed

Fairness of workload

Salary

Working Conditions

Infra Provided

Training Received

Co-Workers

Additional Comments

Very Poor

Poor

Average

Good

Excellent

Very Poor

Poor

Average

Good

Excellent

Very Poor

Poor

Average

Good

Excellent

Very Poor

Poor

Average

Good

Excellent

Very Poor

Poor

Average

Good

Excellent

4. Please rate your line manager on the following factors. (Use the 1-5 scale below. 1-Never, 2-Seldom, 3-Often, 4-Usually, 5-Always)

Gave usable performance feedback

Recognized accomplishments

Clearly Communicated Expectations

Treated you fairly and respectfully

Coached, Trained & Developed you

Resolved Concerns promptly

Listened to suggestions & feedback

Supported work-life balance

Provided Appropriate & Challenging assignment

Your Suggestions for your Line Manager

Never

Seldom

Often

Usually

Always

Never

Seldom

Often

Usually

Always

Never

Seldom

Often

Usually

Always

Never

Seldom

Often

Usually

Always

Never

Seldom

Often

Usually

Always

5. Please Rate Your upper Line manager on the following factors. (Use the 1-5 scale below. 1-Never, 2-Seldom, 3-Often, 4-Usually, 5-Always)

Gave usable performance feedback

Recognized accomplishments

Clearly Communicated Expectations

Treated you fairly and respectfully

Coached, Trained & Developed you

Resolved Concerns promptly

Listened to suggestions & feedback

Supported work-life balance

Provided Appropriate & Challenging assignment

Your Suggestions for your upper Line Manager

Never

Seldom

Often

Usually

Always

Never

Seldom

Often

Usually

Always

Never

Seldom

Often

Usually

Always

Never

Seldom

Often

Usually

Always

Never

Seldom

Often

Usually

Always

6. Please Rate management on the following Parameters. (Use the 1-5 scale below. 1-Never, 2-Seldom, 3-Often, 4-Usually, 5-Always)

Give Fair and equal treatment

Was available to discuss job related issues

Encouraged Feedback and suggestions

Maintained consistent policies and practices

Provided recognition for achievements

Gave opportunities to develop

Your Suggestions on Improvement in our Management style

Never

Seldom

Often

Usually

Always

Never

Seldom

Often

Usually

Always

Never

Seldom

Often

Usually

Always

Never

Seldom

Often

Usually

Always

Never

Seldom

Often


Usually

Always

Personal contact Number

Personal Email ID

Figure 5-20 Submit Employee Feedback Screen

	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 29 of 41
	Kwantify Odoo - Off-Boarding		

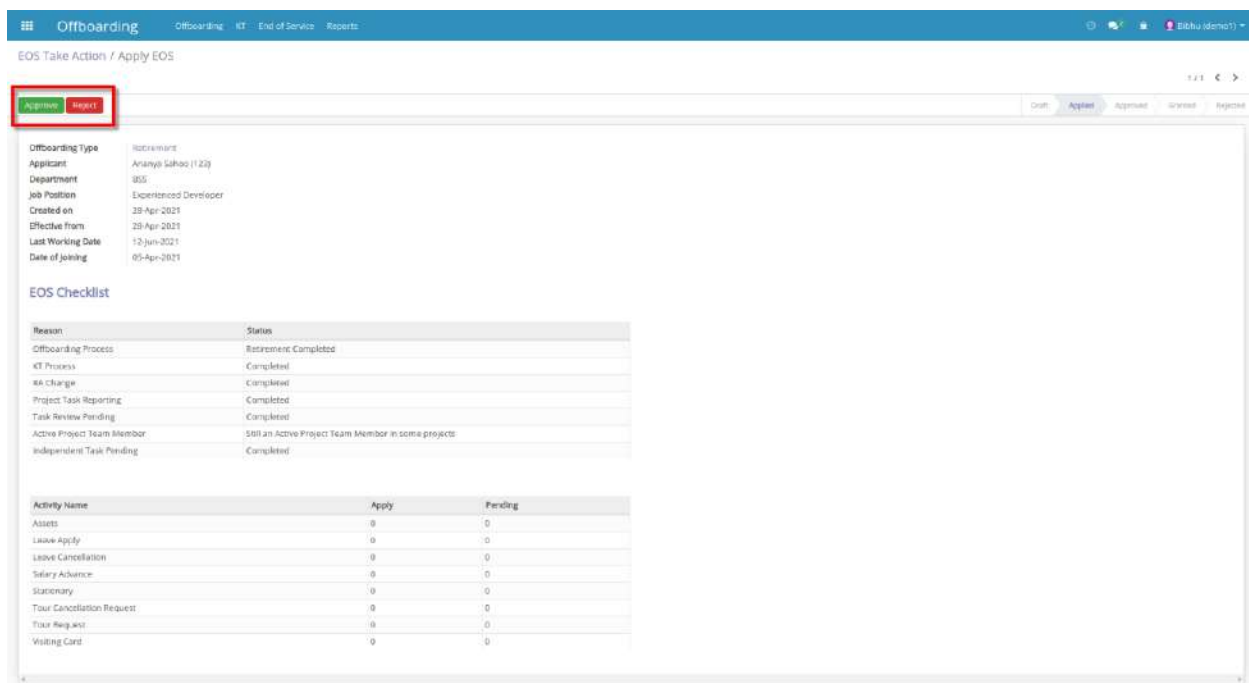
- Submit your response to the questions and answers asked.
- Enter the contact number followed by the email ID for communication.
- Click on **submit** to save the answers.

The EOS request needs an approval from the respective manager, in order to proceed further with the Off-boarding process.

5.8 Manager – EOS Request Approval

Once the EOS is applied by the applicant, the same needs an approval from the respective line manager. The line manager has the authority to take action i.e. either approve or reject the EOS application and forward the application for grant by the HOD.

For EOS approval, login into the portal. Go to **Login>>Dashboard>>Off-Boarding>> End of Service>>Take Action**. Refer to the **Fig 5-21** shared below.




EOS Checklist

Reason	Status
Offboarding Process	Resubmission Completed
IT Process	Completed
iss change	Completed
Project Task Reporting	Completed
Task Review Pending	Completed
Active Project Team Member	Still an Active Project Team Member in some projects
Independent Task Pending	Completed

Activity Name	Apply	Pending
Assets	0	0
Leave Apply	0	0
Leave Cancellation	0	0
Salary Advance	0	0
Stationary	0	0
Tour Cancellation Request	0	0
Tour Request	0	0
Visiting Card	0	0

Figure 5-21 EOS Take Action - Manager Screen

Herein, the application details are provided with EOS checklist including the EOS checklist names, current status, activities and their status.

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	Kwantify Odoo - Off-Boarding		

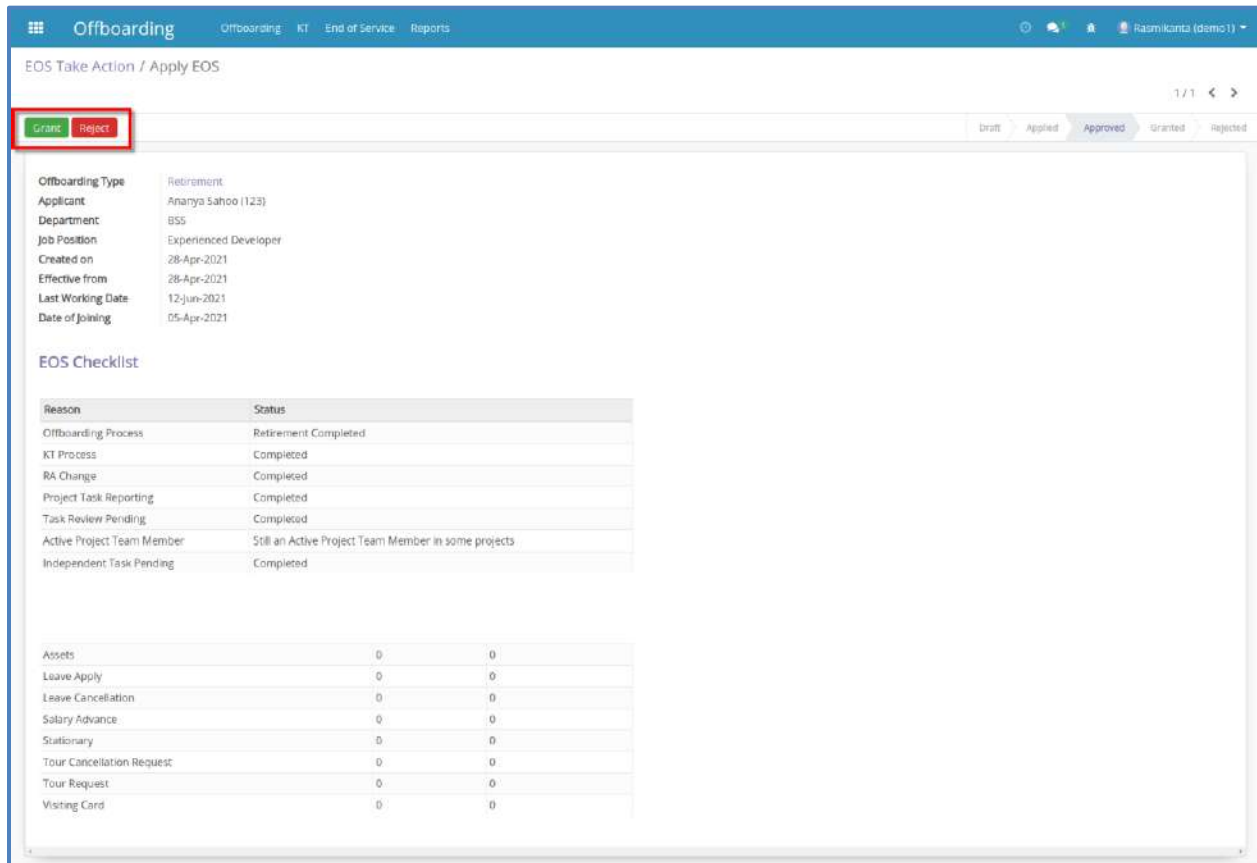
To approve the EOS applied, click on the **Approve** button for the respective record.

On successful approval the EOS request need grant approval from the HOD to move further with the next Off-boarding step.

5.9 HOD/SBU Representative – EOS Grant Approval

The HOD of the department is authorized for grant of the EOS application, which was approved by respective line manager in the **Section 5.8** above. The HOD is authorized to take an action against the EOS application i.e. either grant or reject the EOS application in order to process the clearance procedure.


For EOS grant approval, login into the portal. Go to **Login>>Dashboard>>Off-Boarding>>End of Service>>Take Action**. Refer to the **Fig 5-22** shared below.



Reason	Status
Offboarding Process	Retirement Completed
KT Process	Completed
RA Change	Completed
Project Task Reporting	Completed
Task Review Pending	Completed
Active Project Team Member	Still an Active Project Team Member in some projects
Independent Task Pending	Completed

Assets	0	0
Leave Apply	0	0
Leave Cancellation	0	0
Salary Advance	0	0
Stationary	0	0
Tour Cancellation Request	0	0
Tour Request	0	0
Visiting Card	0	0

Figure 5-22 EOS Grant Approval - HOD Screen

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	Kwantify Odoo - Off-Boarding		

Herein, the application details are provided with EOS checklist including the EOS checklist names, current status, activities and their status.

To grant the EOS applied, click on the **grant** button for the respective record followed by submitting a remark for doing the same.

On successful approval the EOS grant, the applicant needs to submit the clearance form received from various departments.

5.10 Employee- Clearance Form

The Employee needs to receive clearance from all the important department of the organization before end of the notice period. The Clearance Form features remarks and feedback from the reporting authority, finance, IT, admin and HRD department, and it appears in the Clearance Form section under the End of Service menu link, after the EOS has been granted by the HOD.

Go to **Login>>Dashboard>>Off-Boarding>> End of Service>>Clearance Form**.

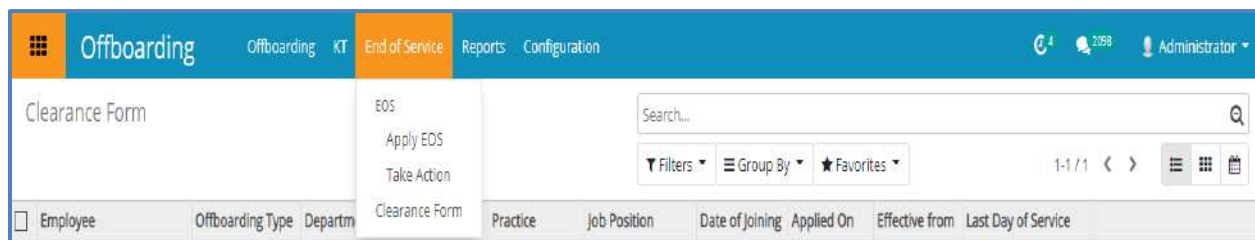



Figure 5-23 Clearance Form Screen

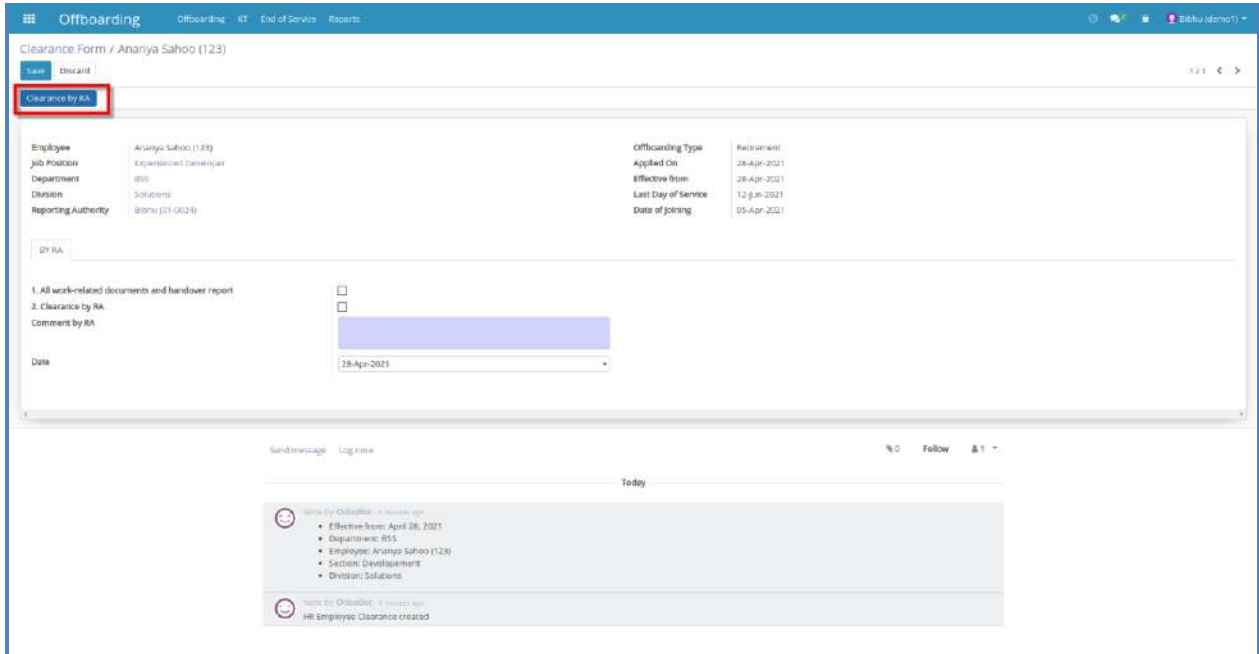
After clicking the Clearance Form, the page navigates to **Fig. 5-24**.



Figure 5-24 Clearance Form Screen


	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 32 of 41
	Kwantify Odoo - Off-Boarding		

- Click on the respective clearance section and get navigated to **Fig. 5-25**.
- Save feedback and remarks from different departments.



The screenshot displays the 'Clearance by RA' screen within the 'Offboarding' module. The interface includes a top navigation bar with 'Offboarding', 'KT', 'End of Service', and 'Reports'. The main content area is titled 'Clearance Form / Ananya Sahoo (123)'. It features a sidebar with 'Save' and 'Discard' buttons, and a 'Clearance by RA' button highlighted with a red box. The employee details section shows: Employee: Ananya Sahoo (123), Job Position: Experienced Developer, Department: BSS, Division: Solutions, and Reporting Authority: Bhanu (IT-0034). The offboarding type is 'Retirement', with dates for Applied On (28-Apr-2021), Effective from (28-Apr-2021), Last Day of Service (12-Jun-2021), and Date of joining (05-Apr-2021). A checklist on the left includes '1. All work-related documents and handover report' and '2. Clearance by RA'. A 'Comment by RA' text area and a 'Date' dropdown (set to 28-Apr-2021) are also present. The bottom section shows a 'Today' timeline with two notifications: 'Note by OdooBot: 4 minutes ago' regarding effective dates and department, and 'Note by OdooBot: 5 minutes ago' stating 'Hi! Employee Clearance created'.

Figure 5-25 Clearance by RA Screen

	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 33 of 41
	Kwantify Odoo - Off-Boarding		

Offboarding
Offboarding
KT
End of Service
Reports

Clearance Form / Ananya Sahoo (123)

Save
Discard

1 / 1

Clearance by Admin

Employee	Ananya Sahoo (123)	Offboarding Type	Retirement
Job Position	Experienced Developer	Applied On	28-Apr-2021
Department	BSS	Effective from	28-Apr-2021
Division	Solutions	Last Day of Service	12-Jun-2021
Reporting Authority	Bikhu (01-0024)	Date of Joining	05-Apr-2021

BY ADMIN

Please indicate if the following has been handed over:

1. Business Cards	<input type="checkbox"/>
2. Access card / ID card	<input type="checkbox"/>
3. Drawer/Cabinet keys	<input type="checkbox"/>
4. Clearance by Admin	<input type="checkbox"/>

Comment by Admin

Date
28-Apr-2021

Send message
Log note

0
Follow
1

Today


Note by OdooBot - 11 minutes ago

- Effective from: April 28, 2021
- Department: BSS
- Employee: Ananya Sahoo (123)
- Section: Development
- Division: Solutions

Note by OdooBot - 11 minutes ago

HR Employee Clearance created

Figure 5-26 Clearance by Admin Screen

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	Kwantify Odoo - Off-Boarding		

Offboarding
Offboarding
KT
End of Service
Reports

Clearance Form / Ananya Sahoo (123)

Save
Discard

1 / 1

Clearance by IT

Employee	Ananya Sahoo (123)	Offboarding Type	Retirement
Job Position	Experienced Developer	Applied On	28-Apr-2021
Department	BSS	Effective from	28-Apr-2021
Division	Solutions	Last Day of Service	12-Jun-2021
Reporting Authority	Bibhu (01-0024)	Date of Joining	05-Apr-2021

BY IT

Please indicate if the following equipment has been handed over:

1. Computer
☐

2. Access to Email, MIS, Biometric system etc.
☐

3. Email Forward To
Comments

4. Exit From CSM Whatsapp Group
☐

5. Cleared by IT
☐

Comment by IT

Date
28-Apr-2021

Send message
Log note


Today

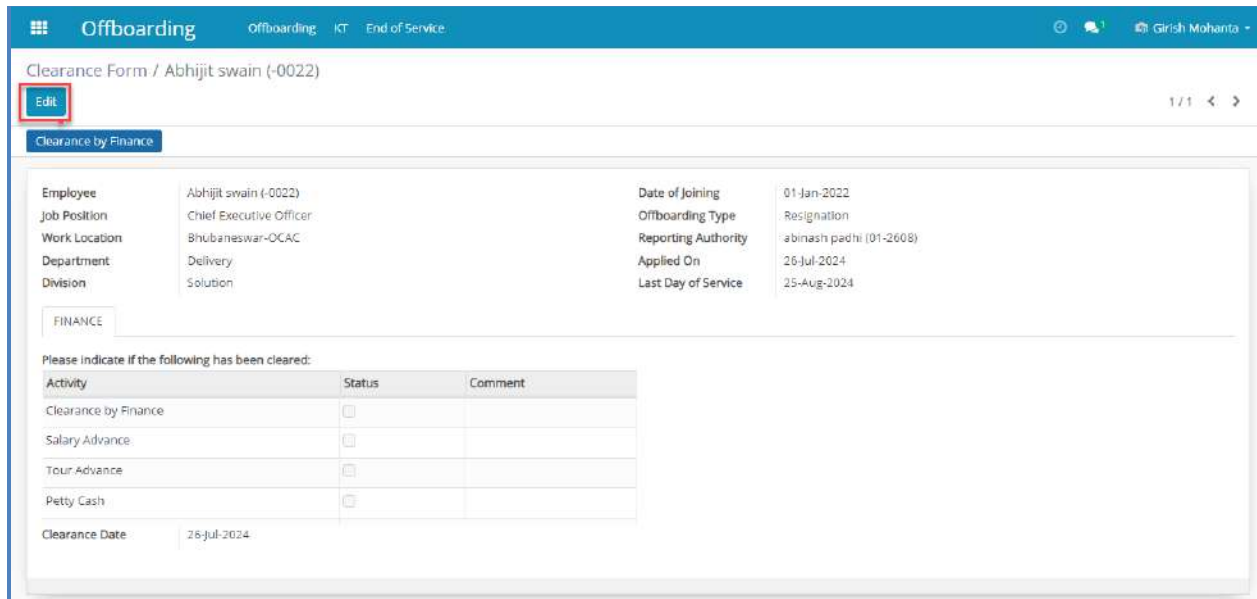
Note by OdooBot - 12 minutes ago

- Effective from: April 28, 2021
- Department: BSS
- Employee: Ananya Sahoo (123)
- Section: Development
- Division: Solutions

Note by OdooBot - 12 minutes ago
HR Employee Clearance created

Figure 5-27 Clearance by IT Screen

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	Kwantify Odoo - Off-Boarding		



Offboarding Offboarding KT End of Service

Clearance Form / Abhijit swain (-0022)

Edit

1 / 1 < >

Clearance by Finance

Employee	Abhijit swain (-0022)	Date of Joining	01-Jan-2022
Job Position	Chief Executive Officer	Offboarding Type	Resignation
Work Location	Bhubaneswar-OCAC	Reporting Authority	abinash padhi (01-2608)
Department	Delivery	Applied On	26-Jul-2024
Division	Solution	Last Day of Service	25-Aug-2024

FINANCE

Please indicate if the following has been cleared:


Activity	Status	Comment
Clearance by Finance	<input type="checkbox"/>	
Salary Advance	<input type="checkbox"/>	
Tour Advance	<input type="checkbox"/>	
Petty Cash	<input type="checkbox"/>	

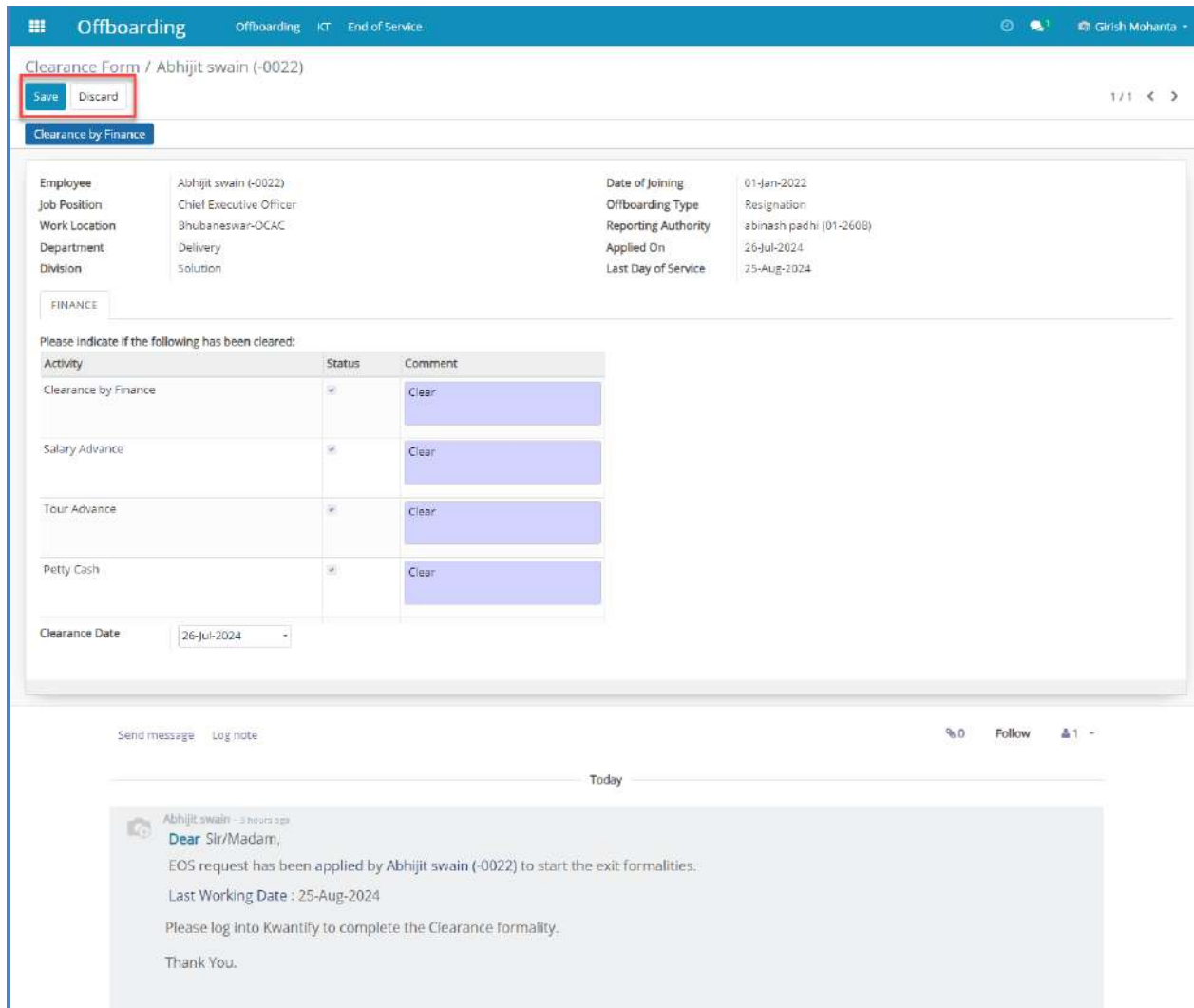
Clearance Date: 26-Jul-2024

Figure 5-28 Clearance Screen

Referring to **Fig. 5-28-**

- In the Status section, if the respective department gives the clearance, the checkbox is displays as blue mark.
- In the Comment section, the respective department to provide the comment and the employee to display the comment against the activity.
- The respective department to edit the status and comment, click the **Edit** button and get navigated to **Fig. 5-29**.

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	Kwantify Odoo - Off-Boarding		



Offboarding | Offboarding | KT | End of Service

Clearance Form / Abhijit swain (-0022)

Save **Discard**

1 / 1 < >

Clearance by Finance

Employee	Abhijit swain (-0022)	Date of Joining	01-Jan-2022
Job Position	Chief Executive Officer	Offboarding Type	Resignation
Work Location	Bhubaneswar-OCAC	Reporting Authority	abinash padhi (01-2608)
Department	Delivery	Applied On	26-Jul-2024
Division	Solution	Last Day of Service	25-Aug-2024

FINANCE

Please indicate if the following has been cleared:

Activity	Status	Comment
Clearance by Finance	<input checked="" type="checkbox"/>	Clear
Salary Advance	<input checked="" type="checkbox"/>	Clear
Tour Advance	<input checked="" type="checkbox"/>	Clear
Petty Cash	<input checked="" type="checkbox"/>	Clear

Clearance Date 26-Jul-2024

Send message Log note

0 Follow 1

Today

Abhijit swain - 3 hours ago

Dear Sir/Madam,

EOS request has been applied by Abhijit swain (-0022) to start the exit formalities.

Last Working Date : 25-Aug-2024

Please log into Kwantify to complete the Clearance formality.


Thank You.

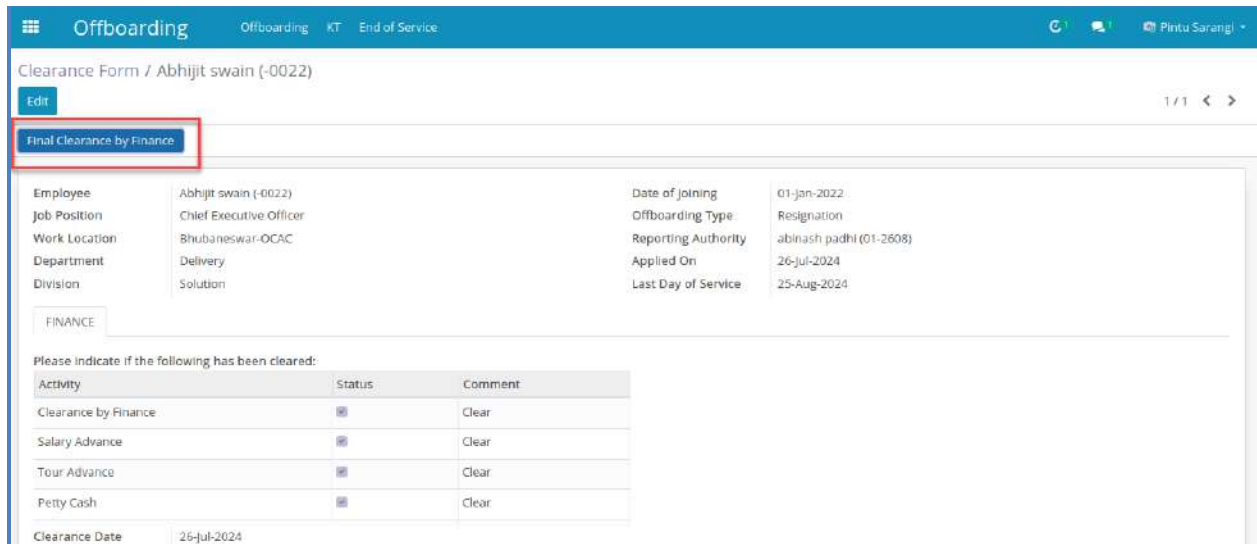
Figure 5-29 Edit Clearance Screen

Referring to **Fig. 5-29**-

- Enter the respective comment and the status.
- Click the **Save** button. Or to cancel, click the **Discard** button.

Further it is forwarded to the finance department for the clearance process.

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	Kwantify Odoo - Off-Boarding		



Offboarding | Offboarding | KT | End of Service

Clearance Form / Abhijit swain (-0022)

[Edit](#)

Final Clearance by Finance

Employee: Abhijit swain (-0022)
 Job Position: Chief Executive Officer
 Work Location: Bhubaneswar-OCAC
 Department: Delivery
 Division: Solution

Date of joining: 01-Jan-2022
 Offboarding Type: Resignation
 Reporting Authority: abinash padhi (01-2608)
 Applied On: 26-Jul-2024
 Last Day of Service: 25-Aug-2024

FINANCE

Please indicate if the following has been cleared:

Activity	Status	Comment
Clearance by Finance	<input checked="" type="checkbox"/>	Clear
Salary Advance	<input checked="" type="checkbox"/>	Clear
Tour Advance	<input checked="" type="checkbox"/>	Clear
Petty Cash	<input checked="" type="checkbox"/>	Clear

Clearance Date: 25-Jul-2024

Figure 5-30 Final Clearance Screen

Referring to **Fig. 5-30**, the Final Clearance is done by the Finance Department.

- The Finance Department to click on the **Final Clearance by Finance** tab.

5.11 HR Manager- Final Clearance and Employee Feedback Review

The HRD department user can view the Employee Feedback submitted under the Clearance Form.



Offboarding | Offboarding | KT | End of Service | Reports | Configuration

Clearance Form

Search: []

Filters: [] Group By: [] Favorites: []


Employee	Offboarding Type	Department	Division	Section	Practice	Job Position	Date of joining	Applied On	Effective from	Last Day of Service
<input type="checkbox"/> Aranya Sahoo (128)	Resignation	HR	Solutions	Development	IT	Experienced Developer	05-Apr-2023	28-Apr-2023	28-Apr-2023	12-Jun-2023

[View Employee Feedback](#)

Figure 5-31 View Employee Feedback Screen

For releasing the employee, clearance from HR department is also mandatory.

The HR shall give clearance to all the data submitted, once the notice period is served completely.

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	Kwantify Odoo - Off-Boarding		

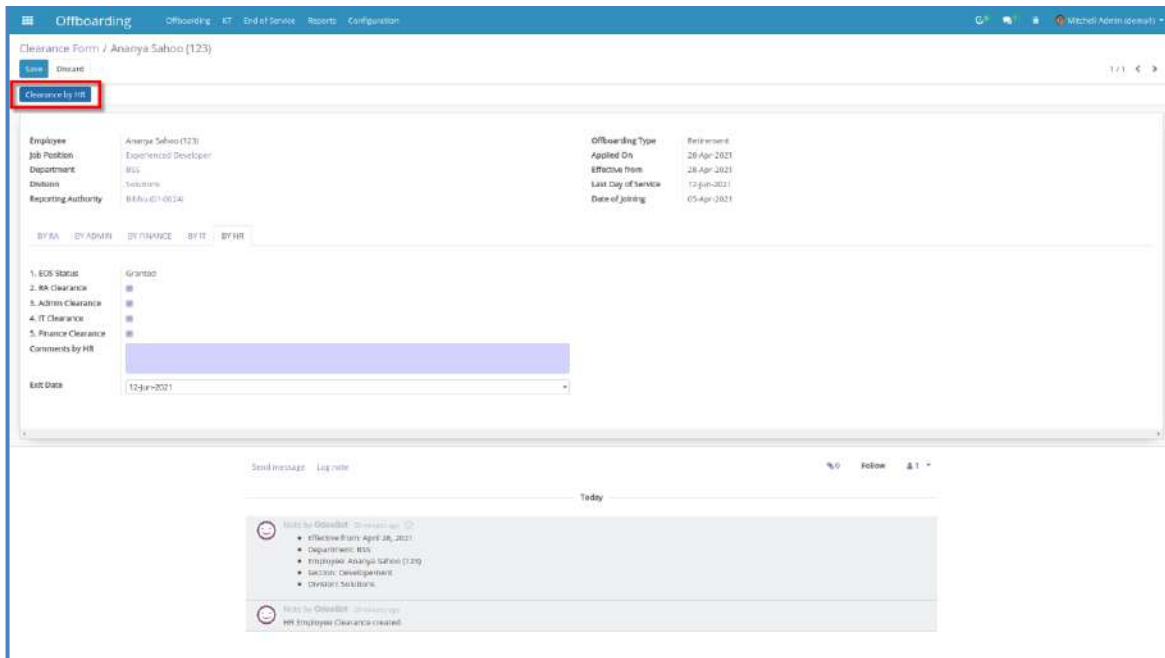


Figure 5-32 Clearance by HR Screen


Refer to the **Fig 5-32**.

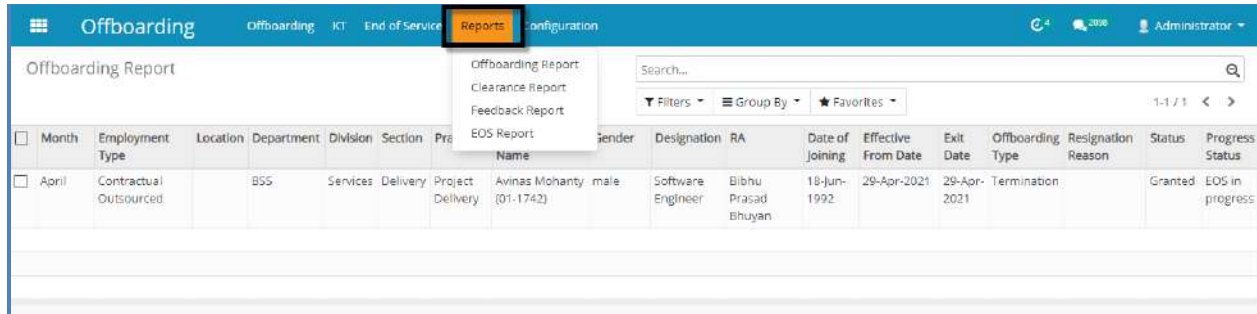
On final clearance and release of the employee from the company, the HR manager shall update employee status to ex-employee in the clearance form.

6 Reports

The Report section contains analytical and statistical data of all the Off-boarding requests, clearances, feedbacks and EOS completed in the form of MIS reports. The record contains analytical data with all necessary details, for quick references to all the activities under Off-boarding. The admin users can refer the reports for information in future.

Go to the Reports link under Off-boarding module and it will expand to off-boarding reports, clearance, and feedback and EOS reports respectively. Refer to the **Fig 6-1**.

	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #:39 of 41
	Kwantify Odoo - Off-Boarding		

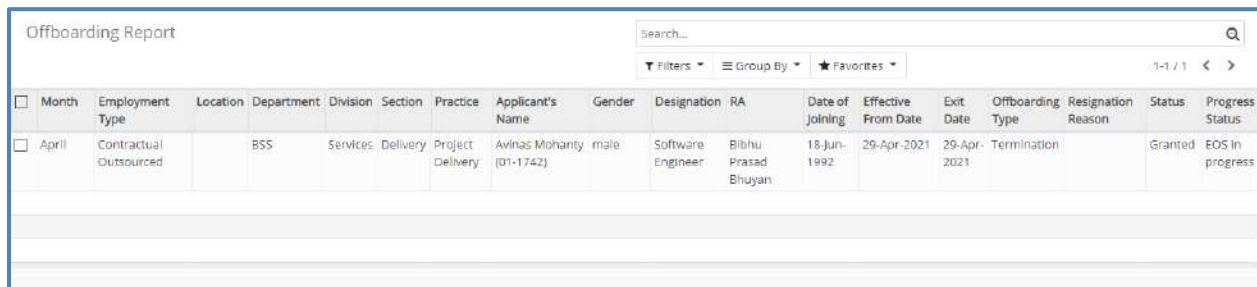


Month	Employment Type	Location	Department	Division	Section	Practice	Applicant's Name	Gender	Designation	RA	Date of Joining	Effective From Date	Exit Date	Offboarding Type	Resignation Reason	Status	Progress Status
April	Contractual Outsourced		BSS	Services	Delivery	Project Delivery	Avinash Mohanty (01-1742)	male	Software Engineer	Bibhu Prasad Bhuyan	18-Jun-1992	29-Apr-2021	29-Apr-2021	Termination		Granted	EOS in progress

Figure 6-1 Reports Screen

6.2 Off-Boarding Reports

To view an analytical data on all the Off-boarding requests received, along with their current status, month of application, employment type, location, department, division, etc., click on the Off-boarding Reports link and get redirected to the following screen. Refer **Fig 7-2**.



Month	Employment Type	Location	Department	Division	Section	Practice	Applicant's Name	Gender	Designation	RA	Date of Joining	Effective From Date	Exit Date	Offboarding Type	Resignation Reason	Status	Progress Status
April	Contractual Outsourced		BSS	Services	Delivery	Project Delivery	Avinash Mohanty (01-1742)	male	Software Engineer	Bibhu Prasad Bhuyan	18-Jun-1992	29-Apr-2021	29-Apr-2021	Termination		Granted	EOS in progress


Figure 6-2 Off-boarding Reports Screen

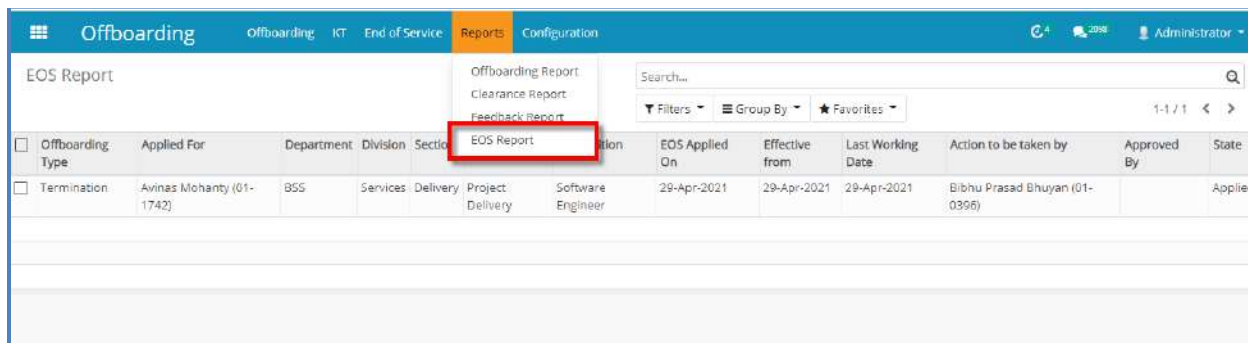
Referring to the screen shared above.

Filter the results shown by entering the employee name and other details in the search filter.

6.3 EOS Reports

A MIS report on all the EOS applied for Off-boarding are displayed in this link, as shown in below screen. The report contains EOS list with information like Off-boarding type, name of the applicant, department, and division, date of EOS application, notice period, action to be taken by authority name, approved by and current status. Refer **Fig 7-3**.

	Quality System Template CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #: 40 of 41
	Kwantify Odoo - Off-Boarding		



EOS Report											
Offboarding Type	Applied For	Department	Division	Section	EOS Report	EOS Applied On	Effective from	Last Working Date	Action to be taken by	Approved By	State
Termination	Avinash Mohanty (01-1742)	BSS	Services	Delivery	Project Delivery	Software Engineer	29-Apr-2021	29-Apr-2021	29-Apr-2021	Bibhu Prasad Bhuyan (01-0395)	Applied

Figure 6-3 EOS Reports Screen

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