Human Resources

Release 8

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Contents

Odoo's Human Resources applications cover a large range of needs: recruitment, appraisals, timesheets, contracts, attendances, etc. Most of them can be integrated with other applications such as Project Management, Billing and Accounting & Finance.

- **Employee directory** is the core application that will allow you to record your employees, manage their personal information and show their public information to the rest of the company.
- **Recruitment** will allow you to track each job application received on the web site or per email and provide appropriate feedback to each applicant; you will be able to keep a pool of candidates which you can pick from for future needs; improve your recruitment process by tracking applicants at each stage of the process and centralizing all information (evaluation, internal emails, resumes).
- **Expenses** will allow you to reimburse the expenses incurred by your employees.
- **Holidays** will allow you to track vacation days accrued by each employee, allow managers to approve leave requests and manage the planning of their teams.
- **Timesheets** will allow you to easily monitor the daily work of your employees by enabling them to record their timesheets.
- **Appraisals** and **Gamification** will allow you to continuously monitor your employee performance and to set up periodic evaluations of employees.

1 Video Case Study

ITools is an IT company providing services & products dedicated to business management. The founder Nick Hawson decided to opt for Odoo as an internal solution, but also as a solution to sell to his customers. Since the company is growing fast and in need of new employees, Nick just hired Clara to manage human resources. She needs appropriate tools to manage the employee directory, the recruitment process, leaves, employee expenses and timesheets.

2 Define Employees and Company Structure

- Install the *Employee Directory* app.
- Create a new employee.
- Set up a department with a manager.
- Associate the department to the new employee from his employee form.
- Create a job position within this department.
- Link the employee to a user.
- Add some employee tags.

Note:

- ***Employee***: *physical person who has a work contract with the company. The employee can be related to a partner (e.g. to register expenses) and to a user (e.g. to register timesheets).*
- ***User***: *physical person who is given access to Odoo.*
- *About HR access rights:*
  - ***Manager***: *dedicated to HR professionals who have to manage and validate all the HR documents.*
  - ***Officer***: *dedicated to team leaders who have to validate requests of their employees (leaves, etc).*
  - ***Employee***: *should be attributed to any internal user to create any document whatever the application.*
- *When creating an employee, it is important to complete his* ***Home Address*** *in the* Personal Information *tab. It actually creates a partner form that contains the employee's personal information, such as his* ***bank account*** *that will be used to refund the validated expenses. If you manage payments in Odoo, don't forget to set the partner related to your employee as supplier in order to be able to retrieve him in bank statements.*

3 Recruit New Employees for the Right Position

3.1 Set up the Recruitment Tool

- Install the *Recruitment Process* app.
- Change the Default job email address.
- Create some job positions.
- Set objectives in terms of recruitment for your job positions.
- Set the HR manager as responsible.
- Set an email alias in order to generate applications automatically from emails received at this email address.
- Select the default interview form and print it. This form intends to help the recruiter to handle the interview.
- Launch recruitment.
- Add a Job Description and Requirements.
- Have a look at the recruitment stage configuration form and customize the process in order to fit your environment.
- As an applicant, send an email to *alias@yourdatabasename.odoo.com* with a CV attached.
- Look at your Message box and open the new application in the system.

Tip:

- *For each recruitment stage, you can choose an email template -* ***Email Template to send automatically*** *- to send to the applicant as soon as you drop the application within this stage. By default, such an email is send when you move to the* First Interview *and* Refused *stages.*

Note:

- *A* ***default job alias*** *is set in HR settings (*jobs*). You can change it if you like. Any email received will generate an application record not linked to any job position.*
- *The Recruitment Responsible of a job position is automatically added as a follower so that he is notified about all the new applications.*

3.2 Publish your Jobs on your Odoo Website

The Recruitment application is fully integrated with the Website Builder. You can now advertise your jobs easily through your Odoo website. This section goes beyond the HR application scope.

- To publish your available jobs on your Odoo website, install *Jobs*.
- Open a job position and describe the job with building blocks.
- Customize the jobs page.
- As an applicant, fill in the application form and upload a CV.

To learn more about Odoo's Website Builder, read the *Website* chapter.

Tip:

- *You can add* ***filters*** by Departments *and* by Offices *to your jobs page by clicking* Customize *in the website admin toolbar.*

3.3 Manage a First Interview

As an HR Manager, you want to meet the interesting applicants yourself.

- In the application form, enter some extra data from the CV like phone, mobile, degree and a tag (e.g. IT).
- After a first initial call (to record as an internal note), add a first quick feedback.
- Schedule a first meeting with the applicant and set up the next action date.
- Move to the First Interview stage.
- On the day of the interview, click *Start Interview* to fill in the form online or *Print Interview* to get it in paper.
- Fill in the form online.
- After the interview, add an appreciation, an expected salary and an internal note.

3.4 Involve Other People in the Process and Hire a Candidate

After a first interview, the HR Manager adds the department manager in the loop in order to schedule a second meeting.

- Move the application to the *Second Interview*, schedule a second interview with the department manager and add him as a follower.
- Add a next action (e.g. Briefing with manager).
- As the manager, have a look at the message received (in your external email box) and open the application form.
- After your meeting, add an internal note to ask the HR manager to hire the applicant.
- As the HR Manager, hire the applicant. Send him an email.
- Create an employee from the applicant. He has been assigned to the right department and job title. Add a profile picture.

3.5 Indexation of Resumes

If your activities are growing, you will probably receive a huge amount of applications. The *Indexation of Resumes* will enable you to search on any keywords contained in all documents sent by applicants or attached to the application.

- Tick *Allow the automatic indexation of resumes* in the Human Resources settings.
- Create a new application and add some documents (pdf, doc, txt, xls, etc.).
- Apply an advanced search in the Applications Kanban view and search for some keywords on Indexed Content. You directly get the applications for which those keywords are identified in their CV. That way you can focus on those applications.

Tip:

- *Images will not be indexed.*

3.6 Send Recruitment Forms to Applicants

Advanced tip

So far, the recruitment form has been used internally to help the HR Manager to perform his interviews. To simplify the process in case of a huge amount of interviews, you can share the form with the applicants to be completed before the interview.

- Open the recruitment form assigned to a job position.
- On the first page, add a question to know the identity of the applicant (e.g. "Name" or "Email") with the following options: Text Input, Mandatory answer.
- Make sure *Login required* box is unchecked in the form settings.
- Click the *Share & invite by email* button and copy the HTML link.
- Insert it in the email template sent in the *First Interview* recruitment stage. Switch the email template to Source format (HTML) to paste the link.
- Move the application to the first interview stage.
- As the applicant, check your emails and complete the recruitment form online.
- To browse the answers, open the applied job in the application form, then click *View Result*. Tick the item number assigned to his name to get only his answers.

This kind of form is based on the *Survey* application. Discover this app in more detail in the **Marketing** chapter.

4 Manage Leaves

4.1 Give and Request Legal Leaves

- Install *Leave Management*.
- As the HR Manager, create an allocation request for annual legal leaves for all employees by switching the allocation mode to *By Employee Tag* (leave type = Legal Leaves; allocation = e.g. 20 days).
- Approve the allocation.
- Have a look at the allocation in *Leaves Summary*.
- As HR User, encode a leave request of 5 days classified in legal leaves.
- As HR Manager, open the request and validate it.

Note:

- ***Leaves can be limited*** *to the amount of days allocated beforehand by unchecking the option* Allow to Override Limit *in the* Leaves Types.
- ***Leaves can request two levels of approval*** *to be validated by checking the option* Apply Double Validation *in the* Leaves Types.

4.2 Encode your Sick Leaves

- As HR User, record a *Leave Request* for Sick Leaves.
- Send your medical certificate through the Chatter.
- As the HR Manager, validate the Leave Request based on the medical certificate.
- Analyze the leaves of your employees from *Reporting → Human Resources → Leaves Analysis*.

Tip:

- *Keep in mind that Odoo does not take into account* ***traditional days off*** *to compute the duration when encoding the leave dates. So check and update the duration if necessary.*
- *Check your* ***leaves summary*** *in* Human Resources → Leaves → Leaves Summary *or in* Reporting → Human Resources → Leaves Analysis. *Allocations are marked as positive quantities and validated requests as negative.*

4.3 Request your Compensatory Leaves

- As the HR Manager, open the Leave Type *Compensatory Days* in *Human Resources → Configuration → Leaves Types*.
- Uncheck *Allow to Override Limit* and make sure that *Apply Double Validation* is checked, then select a *Color in Report*.
- As HR User, ask for your Compensatory Leaves by encoding an *Allocation Request* with type *Compensatory Days*.
- As his manager (HR Officer), approve the Compensatory Leaves (first level).
- As the HR Manager, validate the Leave Request (second level).
- Review the leaves by selecting any employee in *Human Resources → Employees* and printing the *Leave Summary* report.

5 Reimburse your Employee's Expenses

5.1 Encode Some Expenses

- Tick *Manage employees expenses* in the Human Resources settings.
- Create some expense categories from *Human Resources → Configuration*.
- As an employee, encode and *Submit to Manager* some expenses for a business trip (e.g. restaurant, hotel, transport, etc.).

5.2 Validate Expenses

- As his manager (Human Resources Officer), approve the expense sheet by opening the link from your Inbox.
- As the Human Resources Manager, open the *Personal Information* tab of the Employee Form to retreive the personal bank account set in the *Home Address* in order to process the reimbursement. If not set, encode one and make sure it has a Payable Account.
- Start the reimbursement process by generating the accounting entries linked to these expenses and then click *Open Accounting Entries* in order to post it and schedule the refunding.
- [OPTIONAL - See Accounting chapter] Finish the reimbursement by encoding a bank statement in order to reconcile the payments with the accounting entries.

Note:

Importance of the home address

- *It is important when creating any employee, that you complete his* ***Home Address*** *in the "Personal Information" tab of the employee form. It actually creates a partner form that contains the employee's personal information, such as his bank account that will be used to reimburse the validated expenses of the employee. Don't forget to set the partner related to your employee as supplier.*

6 Manage your Employee Working Time

6.1 Record your First Timesheet

- Tick *Manage timesheets* in the Human Resources settings.
- In the employee form, set the right product and analytic journal in order to correctly record timesheet activities.
- Open and complete your first timesheet in *Timesheet Activities*.

Note:

- *The **Service product** set in the employee form should have a sales price in order to reinvoice customers.*

6.2 Record Timesheets Periodically

- Tick *Allow timesheets validation by managers* in the Human Resources settings.
- Open a timesheet from the tab suggested in *Human Resources* → *Time Tracking* → *My Current Timesheet*.
- As the Human Resources Manager, set up the periodicity of your timesheets in the Human Resources settings.
- As employee, encode your weekly working time by Analytic Account to follow the time spent per project/activity.
- Submit your timesheet to your Manager for validation.

6.3 Review and Validate Timesheets

- As Human Resources Officer, go to *Timesheets to Validate*, check the summary and details before approving it.
- Review the summary of all timesheets from *Reporting* → *Human Resources* → *Timesheet Analysis*.

7 Assess your Employee Performance

7.1 Create Appraisal Plans

- Tick *Organize employees periodic evaluation* in *Settings* → *Configuration* → *Human Resources*.
- Create an appraisal plan for employees that will always take place after 1 year, then every 6 months.
- Determine the kind of evaluation that will have to be done in the Appraisal Phase, as shown below:

Phase	Action	Appraisal Form	Wait Previous Phases
Send to Subordinates	Bottom-Up Appraisal Requests	Employee Opinion Form	False
Send to Managers	Top-Down Appraisal Requests	Employee Opinion Form	False
Send to the Employee	Self Appraisal Requests	Employee Appraisal Form	False
Final interview with manager	Final Interview	Final interview	True

Note:

- *The month for the **first appraisal** is computed at the date of assigning the Appraisal Plan to an employee.*
- *The **Actions of the Appraisal Phases** determine which employee will be involved and invited to complete an evaluation form about the appraised employee.*

Tip:

- *The appraisal is done according to a plan in which various surveys can be created. Each survey can be answered by a particular level of employee hierarchy. The final review and appraisal is done by the manager.*

7.2 Attribute Appraisal Plan

- From the Employee form, attribute an appraisal plan to each employee. Make sure it corresponds to his position.
- Go to *Human Resources* → *Appraisals* → *Appraisals* and notice that some Appraisals are in progress with a deadline of 1 month.
- Open the appraisal and notice that the interview requests have been automatically sent.
- Interviewers can set their attributed phases to Done when completed.
- Validate the appraisal, enter an appreciation and comments.
- Set the Appraisal as done, which will automatically set the *Ending Date*. Close the current appraisal process and look at the reference date for the next appraisal.

Note:

- ***Interview Requests are automatically generated*** *according to each employee's appraisal plans. Each user automatically receives emails inviting him to perform the appraisal of his colleagues.*
- *The* ***deadline*** *is only an indication of the time left to complete all the surveys for the appraisal; it is set by default to one month after the start of the appraisal process.*

8 Challenge and Set Goals for your Employees

8.1 Reward your Employee with Badges

The *Gamification* app of Odoo gives you simple and creative ways to motivate and evaluate your employees. Reinforce good habits and improve win rates with real-time recognition and rewards inspired by game mechanics. Align sales teams around clear business objectives with challenges, personal goals and team leader boards.

This app gives you tools to challenge employees to reach specific targets.

You can create a template from various examples and choose any business object for the challenge, according to your company's needs - such as number of new leads, time to qualify a lead or the total amount invoiced in a specific week, month or any other time frame based on your management preferences. Goals may include your database setup as well (e.g. set your company data and a time zone, create new users, etc.).

- Tick *Drive engagement with challenges and badges* in the Human Resources settings.
- Manually grant the *Good Job* badge to an employee, because he found a solution for an important customer.
- Create a new challenge called *Your First Timesheet*.
- Assign the challenge to the *Employee* group.
- Create the goal *Your First Timesheet*.
- Make sure the *Reward as soon as every goal is reached* is ticked and create a new badge to be assigned as reward *For Every Succeeding User*.
- Set the Challenge to the stage "In Progress".
- Open the Related Goals, check your personal Goals in *Messaging*, then create your first *Timesheet Activity*.

- Refresh the *Your First Timesheet* goal in *Messaging*.
- Show the received badge in your Employee form.

Note:

- ***Goal***: *objective assigned through challenges to evaluate and compare team members with each other and over time*
- ***Goal Definition***: *goal template*
- ***Challenge***: *framework definition of a set of goals (members, time, rewards, etc.)*
- ***Badge***: *reward offered to winners and/or to people who achieved goals*

8.2 Challenge your Sales Force

- Make sure *CRM Gamification* is installed.
- Go to *Human Resources → Engagement → Challenges* and remove the filter for Running Challenges.
- Open the default challenge *Monthly Sales Targets*, assign it to all employees, make sure it is in *Leader Board* mode and change the *Target Value to Reach*.
- Add an extra Goal Definition: Logged Calls →= 10.
- Add a badge *For 1st user* in *Reward* that will be attributed once every month.
- Make sure the challenge is *In Progress*.
- As a user, create an invoice and show the Leader Board in the Messaging Menu.

Note:

- *You can* ***create your own goal definitions****, dedicated to any other application objects. The interface is 100% flexible thanks to advanced configuration fields like computation mode, fields & Python domains to take into account, etc.*
- *If the Human Resources module is installed, badges apply to* Employees. *If not, they apply to* Users.