



Savoir-faire
LINUX®



odoo

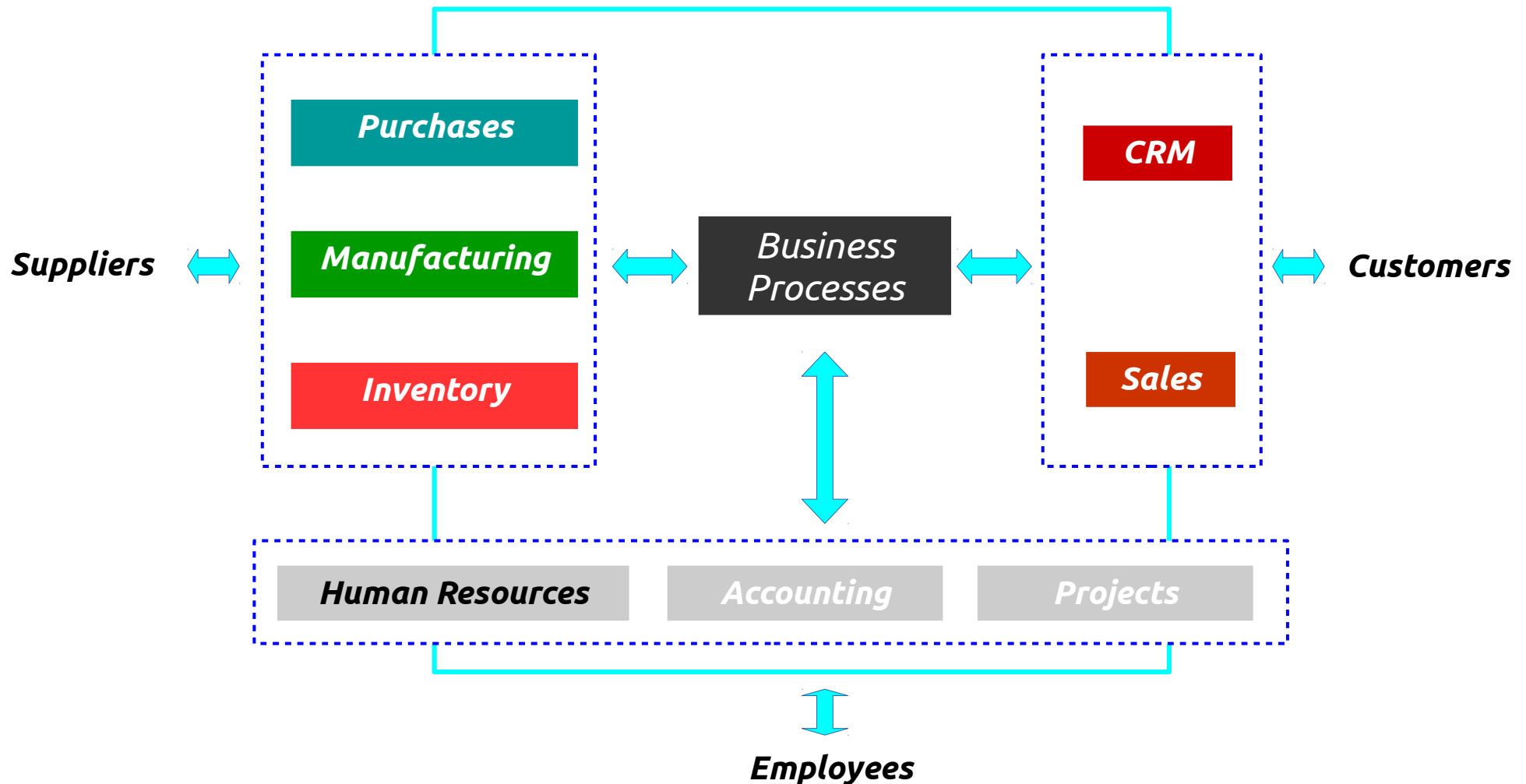
ICTC Training program

Versioning

Version	Date of version	Author / Contributors	Modifications
2	2017-06-09	Carol Andrea Guerrero Mickaël Brard Julien Jézéquel-Bréard	Diffusion initiale

Summing-up

Integrated Business Process with Odoo



Summing-up / ERP Modules



CRM

- Sales team Management
- Customer Management
- Lead Management
- Opportunities Management
- Help Desk & Support



Sales

- Quotation Management
- Order Management
- Invoice Management
- Products & Pricing Management



Purchases

- Purchasing Management
- Replenishment
- Supplier Management
- Products / Services Management



Inventory

- Inventory Management
- Logistics – In & Out Bound
- Stock Allocation
- Warehouse & Locations Management



Manufacturing

- Production Order
- Bill of Material
- Routing
- Quality & Maintenance
- Lean Manufacturing

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Human Resources Management

Outcomes

- Business issues and the context of HR
- Resourcing and talent management
- Managing and coordinating the HR function
- Reward management
- Using information in HR for cross-sectional operations

Human Resources Strategies

HR Strategies

1. Planning Process

- Strategic Business Planning
- HR Strategies & Plans
- Workforce Planning
- Salary Planning
- Employment Law

2. HR Process

- Organization & Job Design
- Talent Acquisition
- Performance Management
- Training & Performance Support
- Payroll Management
- Absence & Attendance Management

3. Measuring

- Budget Unit
- Individual Performance Goals
- Program Scheduling & Assignment
- Monitoring & Control of Results
- Available / Projected Resources

4. Action Plans

- Staffing Authorizations
- Recruitment & Retention
- Career Planning
- Organizational Changes
- Professional development
- Compensation & Benefits
- Labour Relations
- Occupational Health & Safety

odoo Human Resources



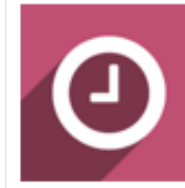
Employee Directory
Jobs, Departments, Employees Details



Employee Appraisals
Periodical Appraisal



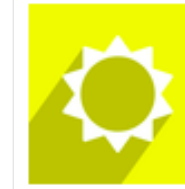
Recruitment Process
Jobs, Recruitment, Applications, Job Interviews



Timesheets
Track time spent on each job by employee



Expense Tracker
Expenses Validation, Invoicing



Leave Management
Holidays, Allocation and Leave Requests



Fleet Management
Vehicle, leasing, insurances, costs

odoo Human Resources

Manage

- Create employee profiles
- Manage contracts
- Manage timesheets
- Handle attendance
- Manage leaves
- Dashboards per manager

Collaborate

- Enterprise Social Network
 - Chat in real time
 - Follow employees & documents
 - Join discussion groups
 - Share files
 - Gamification / Reward employees' performance

Integration (Apps)

- Recruitment
- Appraisals
- Expenses
- Fleet

odoo

Employees Management

Employee Profile

In this module, you can manage employee information and centralize all RH information such as :

- **Creation of Departments**

- **Creation Employee Profile**

- Public Information

- Contact Information

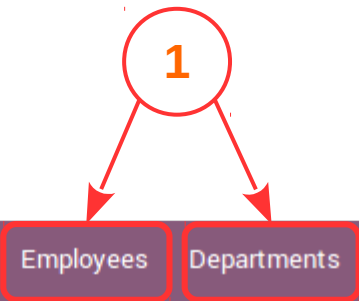
- Position (Job Title, Department, Manager, etc.)

- Personal Information (Bank Account Number, Personal Address, Identification, Gender, Marital Status, etc.)

- Appraisal

- HR Settings (Timesheet Cost, Status within the company)

odoo Employees



The screenshot displays the Odoo Employees interface. At the top, a purple header bar contains a grid icon, the text "Employees", and two buttons: "Employees" and "Departments". Both buttons are highlighted with red boxes. Above these buttons, a red circle with the number "1" has two red arrows pointing down to the "Employees" and "Departments" buttons respectively. Below the header, the "Departments" section is visible, featuring a "CREATE" button. The main content area is divided into two columns. The left column is for the "Administration" department (edu-crashtest1) and the right column is for the "Sales" department (edu-crashtest1). Each column has a "More" button with a dropdown arrow. Below the department name, there is a green "EMPLOYEES" button. At the bottom of each column, there is an "Absence" section with a green progress bar and a count: "0 / 0" for Administration and "0 / 1" for Sales.

Employees Employees Departments

Departments

CREATE

Administration edu-crashtest1 More

EMPLOYEES

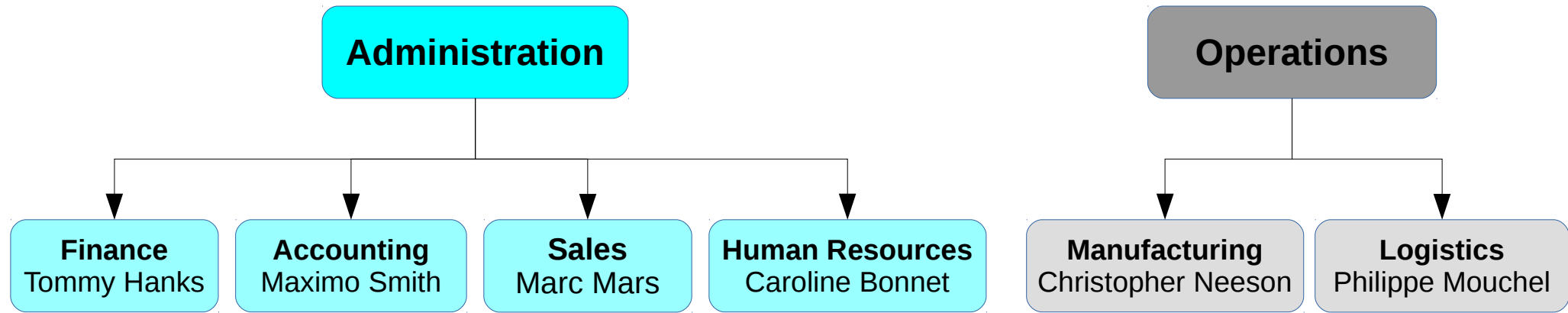
Absence 0 / 0

Sales edu-crashtest1 More

EMPLOYEES

Absence 0 / 1

Exercise : Organizational structure



TO DO

- Create the different departments of the company « Canadian Colors » in the system.
- Create employee profiles for company managers. Invent the information that is necessary.

The background of the entire image is a dark, textured brick wall. The bricks are arranged in a standard running bond pattern, with visible mortar lines. The lighting is slightly uneven, giving the wall a three-dimensional appearance.

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Recruitment Process

Workforce Planning

- Workforce Needs
- Environment Scan (External Factors & Internal Supply)
- Gather Data & Analysis Data
- Analyse Supply Gaps
- Identify workforce strategies & policies
- Recruitment priorities
- Monitor & Evaluate

Selection Process

- ① Needs analysis
- ② Recruitment
- ③ Reception of applications
- ④ Preselection
- ⑤ Tests
- ⑥ Initial Entreview
- ⑦ Engagement
- ⑧ Incorporation
- ⑨ Monitoring

Exercise : Manage the hiring process

As Human Resource Manager of Canadian Colors, you want to manage the whole hiring process at Odoo for a new job position « Junior Sales Consultant ».

TO DO

- *Use the module « Recruitment » and customize the steps of the recruitment process: pre-qualification, first interview, second interview, contract proposal.*
- *Set up the new job position « Junior Sales Consultant »*
- *Follow and build a database for an new applicant. Invent the information that is necessary.*

odoo Hiring Process

The screenshot displays the Odoo Recruitment module interface. A modal dialog box titled "Create a Job Position" is open in the center. The dialog has a "Job Title" field with the text "Junior Sales Consultant" entered, which is highlighted by a red rectangle. Below the field are two buttons: "CREATE" and "DISCARD". The background shows a list of job positions with columns for the position name, application status, and hiring progress. The positions listed include Chief Executive Officer, Human Resources Manager, Marketing and Community Manager, and Trainee.

Job Position	Application(s)	Interview Form	Recruitment Done	Hired Employees
Chief Executive Officer	0 / 1	0 / 1	0 / 1	0 / 1
Human Resources Manager	0 / 1	0 / 1	0 / 1	0 / 1
Marketing and Community Manager	0 / 4	0 / 4	0 / 4	0 / 4
Trainee	0 / 6	0 / 6	0 / 6	0 / 6

odoo Hiring Process


Recruitment					Job Positions Resumes and Letters Reports Configuration					📞 @ 24 🗨 ✕ 👤 Administrator				
Job Positions					Search...					1-8 / 8 < >				
CREATE														
Chief Executive Officer More ▾					Chief Technical Officer More ▾					Consultant More ▾				
APPLICATION(S) Interview Form Recruitment Done					APPLICATION(S) Interview Form Recruitment Done					APPLICATION(S) Interview Form Recruitment Done				
Hired Employees <input type="text"/> 0 / 1					Hired Employees <input type="text"/> 0 / 1					Hired Employees <input type="text"/> 0 / 1				
Experienced Developer More ▾					Human Resources Manager More ▾									
APPLICATION(S) Document(s) 1 Interview Form Recruitment Done					APPLICATION(S) Interview Form Recruitment Done									
Hired Employees <input type="text"/> 0 / 4					Hired Employees <input type="text"/> 0 / 1									
Marketing and Community Manager More ▾					Trainee More ▾					Junior Sales Consultant More ▾				
APPLICATION(S) Document(s) 1 Interview Form Recruitment Done					APPLICATION(S) Document(s) 1 Interview Form Recruitment Done					APPLICATION(S) Recruitment Done				
Hired Employees <input type="text"/> 0 / 4					Hired Employees <input type="text"/> 0 / 6					Hired Employees <input type="text"/> 0				


vacancies

odoo Steps of the recruitment process

Edit Column

Stage Definition

Stage name Negotiation 

Job Specific Junior Sales Consultant 

Folded in Recruitment ☐

Pipe

Use template

Requirements

Recruitment Job Positions Resumes and Letters Reports Configuration

Job Positions / Applications

Applied Job Junior Sales Consultant Search...

CREATE

Initial Qualification	+	First Interview	+	Second Interview	+	Negotiation	+	↔	>

CONTRACT SIGNED (0)

ADD NEW COLUMN

odoo Candidate Applications

RecruitmentJob PositionsResumes and LettersReportsConfiguration

Job Positions / Applications / New

SAVEDISCARD

CREATE EMPLOYEEREFUSE

PRE-QUALIFICATIONFIRST INTERVIEWSECOND INTERVIEWCONTRACT PROPOSAL

MeetingsDocuments

Subject / Application Name

Junior Sales Consultant

Applicant's Name

Charlie Smith

Tags

Sales x

Contact

Email

charliesmith@inc

Phone

541367 89 00

Mobile

Degree

Bachelor Degree

Responsible

Paul Tremblay

Next Action

04/05/2017

Call for interview

Appreciation

☆☆☆

Source

Linkedin

Referred By

Job

Applied Job

Sales Representative

Department

Company

edu-crashtest1

Contract

Expected Salary

55.000

Extra advantages...

Proposed Salary

57.000

Extra advantages...

Availability

04/07/2017

Application Summary

Feedback of interviews...

Exercise : Desing and scoring a job interview

In pairs, you will desing and score a job interview to the new job position « Junior Sales Consultant ».

To fully realize the effectiveness of your interview questions, design the questions so that they are based on the position requirements (education and experience, skills, working conditions, complexity of work, etc.)

TO DO

- *To develop effective interview questions, follow these steps :*
 1. *Identify key job qualifications (eg. Conflict-resolution skills)*
 2. *Develop an interview assessment for each question*
- *Using the Survey Module in Odoo, create the job interview template that you have designed with your colleague.*

The background of the image is a dark, textured brick wall. The bricks are arranged in a standard running bond pattern, with visible mortar lines. The lighting is slightly uneven, giving the wall a three-dimensional appearance.

odoo

Timesheets & Leaves

odoo Timesheets & Leaves

These modules are digital documents, which allow summarizing hours worked by each worker during a pay period, and record employee attendance.

In detail these digital document or spreadsheets, workers can record the time of arrival and departure of workers, record the amount the time spent on each job, and track time & attendance for employees, specially for payroll purposes.



Timesheets

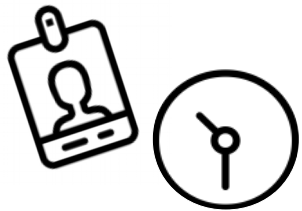
Track time spent on each job by employee



Leave Management

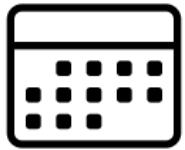
Holidays, Allocation and Leave Requests

odoo Integration with other Odoo Apps



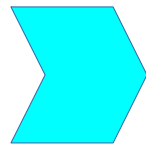
Timesheets

Record time spend on each job by employee



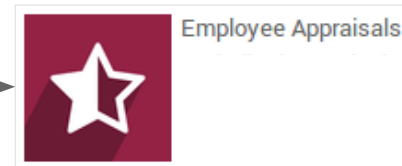
Attendance

Tracking for employee vacation and sick days



Employee Profile

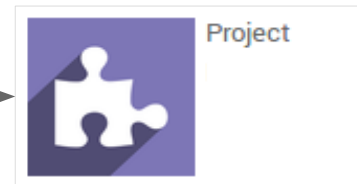
Update calendars automatically, and summary of time worked in a job



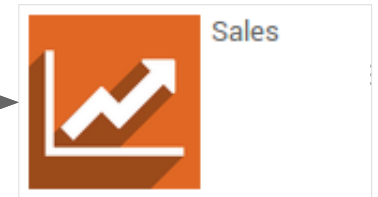
Employee Appraisals



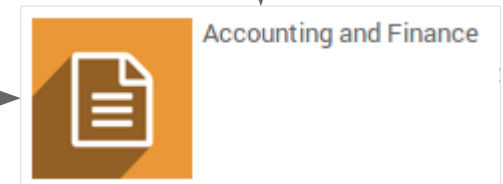
Manufacturing



Project



Sales



Accounting and Finance

Exercise : Employee profile / Timesheets / Leaves

A new candidate is hired as a Junior Sales Consultant. These were his/her activities at the close of the first month of work:

- During the first three weeks, he/she completed 40 working hours each
- Last week, he/she was absent from his/her duties
- For the following month, he/she will be two days off work to attend a family activity

TO DO

- *Create the new employee profile. Invent the information that is necessary.*
- *Record the total hours worked last month*
- *As an employee request the days you will be out of work for the following month. This application will be approved by his/her superior*

odoo Employee Profile

Employees

Employees

Contracts

Challenges

Departments

@ 24

✕
























Administrator

Employees

Search...

1-23 / 23

CREATE

 <p>Antoine Langlais Chief Technical Officer Building 1, Second Floor antoine@openerp.com +3281813700</p> <p>FOLLOWING</p>	 <p>Ashley Presley Human Resources Manager Building 1, Second Floor ashley@openerp.com +3281813700</p> <p>FOLLOWING</p>	 <p>David Samson Experienced Developer Building 1, Second Floor david@openerp.com +3281813700</p> <p>FOLLOWING</p>	 <p>Famke Jenssens Marketing and Community Manager Building 1, Second Floor famke@openerp.com +3281813700</p> <p>FOLLOWING</p>	 <p>Gilles Gravie Experienced Developer Building 1, Second Floor gilles@openerp.com +3281813700</p> <p>FOLLOWING</p>
 <p>Hans Anders Experienced Developer Building 1, Second Floor +3282823500</p> <p>FOLLOWING</p>	 <p>Jack Macklin Experienced Developer Building 1, Second Floor jack@openerp.com +3281813700</p> <p>FOLLOWING</p>	 <p>Jan Van Eyck Experienced Developer Building 1, Second Floor jve@openerp.com +3282823500</p> <p>FOLLOWING</p>	 <p>Jean-Pierre Carnaud Consultant Building 1, Second Floor jep@openerp.com +3282823500</p> <p>FOLLOWING</p>	 <p>Jimmy Kosikin Consultant Building 1, Second Floor jimmy@openerp.com +3281813700</p> <p>FOLLOWING</p>
 <p>John Doe Marketing and Community Manager Building 1, Second Floor jod@openerp.com +3282823500</p> <p>FOLLOWING</p>	 <p>John Smith Experienced Developer Building 1, Second Floor john@openerp.com +3281813700 +32486571630</p> <p>FOLLOWING</p>	 <p>João Gomer Experienced Developer Building 1, Second Floor jog@openerp.com +3282823500</p> <p>FOLLOWING</p>	 <p>Juan Gomez Consultant Building 1, Second Floor +3282823500</p> <p>FOLLOWING</p>	 <p>Liam Nelson Experienced Developer Building 1, Second Floor liam@openerp.com +3281813700</p> <p>FOLLOWING</p>
 <p>Luigi Rondi Marketing and Community Manager Building 1, Second Floor lur@openerp.com +3282823500</p> <p>FOLLOWING</p>	 <p>Martin Lawrence Consultant Building 1, Second Floor martin@openerp.com +3281813700</p> <p>FOLLOWING</p>	 <p>Michael Hawkins Experienced Developer Building 1, Second Floor michael@openerp.com +3281813700</p> <p>FOLLOWING</p>	 <p>Pieter Parker Chief Executive Officer Building 1, Second Floor pieter@openerp.com +3281813700</p> <p>FOLLOWING</p>	 <p>Roger Scott Building 1, Second Floor +3282823500</p> <p>FOLLOWING</p>
 <p>Николай Петра Consultant Building 1, Second Floor +3282823500</p> <p>FOLLOWING</p>	 <p>佐藤さくら (demo_ja_JP) Consultant Building 1, Second Floor +3282823500</p> <p>FOLLOWING</p>	 <p>趙生 (demo_zh_CN) Experienced Developer Building 1, Second Floor +3282823500</p> <p>FOLLOWING</p>		

odoo Employee Profile

Employees

Employees

Contracts

Challenges

Departments

@ 24

✕

Administrator

Employees / New

SAVE

DISCARD

Active

0 Appraisals

0 Contracts

0 Timesheets

0 Payslips

Name

Employee's Name

e.g. Part Time

PUBLIC INFORMATION

APPRAISAL

PERSONAL INFORMATION

HR SETTINGS

Contact Information

Working Address

YourCompany

Work Mobile

Work Location

Work Email

Work Phone

Public Info

Other Information ...

Position

Department

Job Title

Manager

Coach

Working Time

CC-BY-NC-SA

odoo Timesheets

Employees

Employees

Contracts

Challenges

Departments

@ 24

✕

Administrator

Employees / Ashley Presley / Timesheets / New

SAVE

DISCARD

NEW

WAITING APPROVAL

APPROVED

00:00
Timesheet

0
Attendances

Employee

Ashley Presley

Timesheet Period

12/12/2016

to 12/18/2016

SUMMARY

DETAILS

ATTENDANCES

	Mon Dec 12	Tue Dec 13	Wed Dec 14	Thu Dec 15	Fri Dec 16	Sat Dec 17	Sun Dec 18	Total
<div></div>	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00

Click to add projects, contracts or analytic accounts.

You will be able to register your working hours and activities.

odoo Attendance & Leaves

Employees

Employees Contracts Challenges Departments

24

Administrator

Employees / Ashley Presley / Leaves / New

SAVE

DISCARD

APPROVE

REFUSE

TO SUBMIT

TO APPROVE

APPROVED

Description

Leave Type

Duration

0.00 days

Mode

Employee

Department

Reported in last payslips

By Employee

Ashley Presley

Administration

Comment by Manager

e.g. Report to the next month...

The background of the image is a dark, textured brick wall. The bricks are arranged in a standard running bond pattern, with visible mortar lines. The overall color is a dark charcoal or black, with some lighter grey tones in the mortar joints.

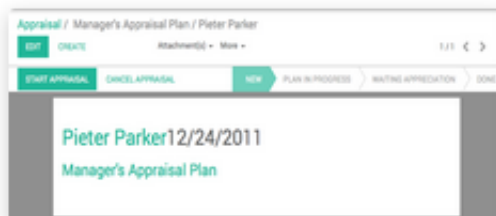
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Employee Appraisals

odoo Employee Appraisals

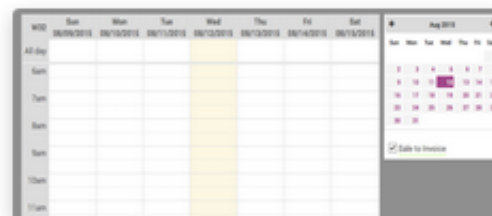
- Manage periodical employee evaluations of employees' performance
- Create appraisals and collect insightful information
- Use templates or Employee Appraisals Form
- Automate the evaluation process

Easy follow-up



Clearly see the appraisal status for each employee or for the whole company

Clear calendar view



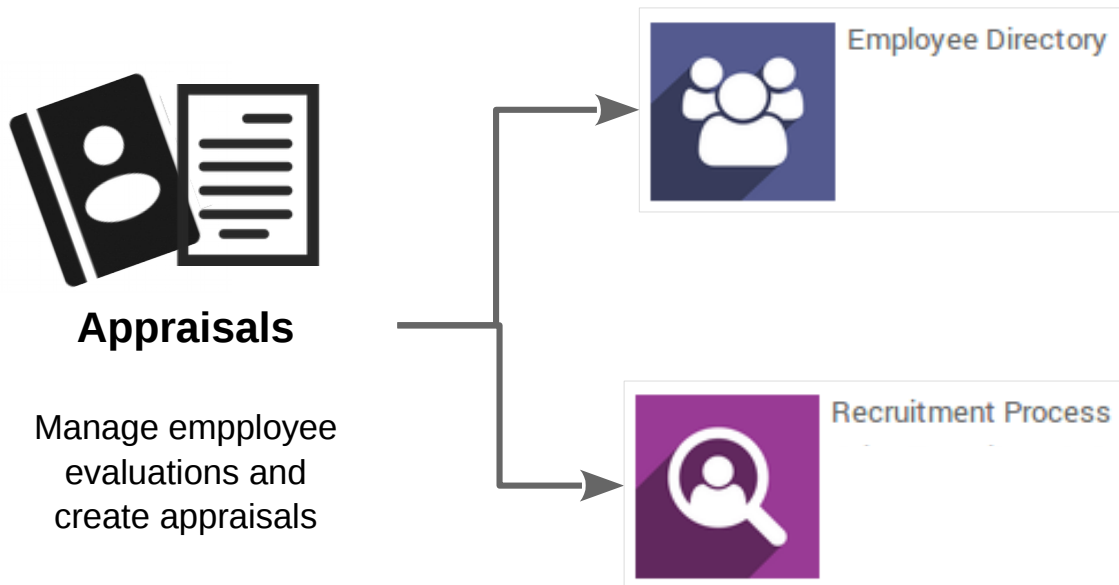
Keep track of upcoming evaluations and send reminders to respondents

Exportable answers



Turn every evaluation into a printable PDF form.

odoo Integration with other Odoo Apps



odoo Set up appraisals

Appraisal

Appraisal

Reports

@

✕

ictcfmation@savoirfairelinux.com

Appraisal / New

SAVE

DISCARD

START APPRAISAL AND SEND FORMS

TO START

APPRAISAL SENT

DONE

0 Answers

Employee

Pilar Smith

Appraisal Deadline

04/06/2017

Final Interview

04/06/2017

PLAN

Manager

☐

Employee

☒

Collaborator

☐

Colleagues

☐

Appraisal Form...

Create and Edit...

odoo Set up appraisals

Create: Self Appraisal ×


DESIGN SURVEY

DRAFT

IN PROGRESS

CLOSED

PERMANENT

 0
Answers

Title

Collaborative work

EDIT PAGES AND QUESTIONS

OPTIONS

Page Title

Questions

Add an item

SAVE

DISCARD

odoo Set up appraisals

Create: Questions ×

Question name

lity to cope with the team's multiple disciplines

Type of Question

☐ Multiple Lines Text Box

☐ Single Line Text Box

☐ Numerical Value

☐ Date and Time

☒ Multiple choice: only one answer

☐ Multiple choice: multiple answers allowed

☐ Matrix

☐ answer

☒ answer

☐ answer

ANSWERS OPTIONS

Choices

✚ Vey bad

✚ Bad

✚ Average

✚ Good

✚ Very good

Add an item

SAVE & CLOSE

SAVE & NEW

DISCARD

Exercise : Set up an appraisal

« Canadian Colors Inc » Human Resources wants to make a survey for all employees to measure the working environment and teamwork between the different departments of the company. For that, you must design the survey and apply it to some employees :

Your feelings within the team

Tell us how you feel as a member of the team. We ask you to be true and honest, as the aim here is to make sure everyone feels well integrated and that we can find a solution for every problem that is faced within the team.

	Very bad	Bad	Average	Good	Very good
Ability to cope with the team's multiple disciplines					
Enthusiasm and implication towards projects / assignments					
Compliance to internal rules and processes					
Ability to work efficiently with peers					
Initiative and autonomy					
Proactivity					

TO DO

- Create the survey taking the above information
- Pick any employee created in the system and apply this survey

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Expense Management

odoo Expense Management

- A full overview of employee expenses, streamline the approval process and track all records.
- Record and access all employees' fees, travel expenses or any other costs.
- Allow employees to add copies of the receipts and proofs directly
- Manage expenses per team



Employees

Draft and confirm expenses, and load receipts to the expense records.



Managers

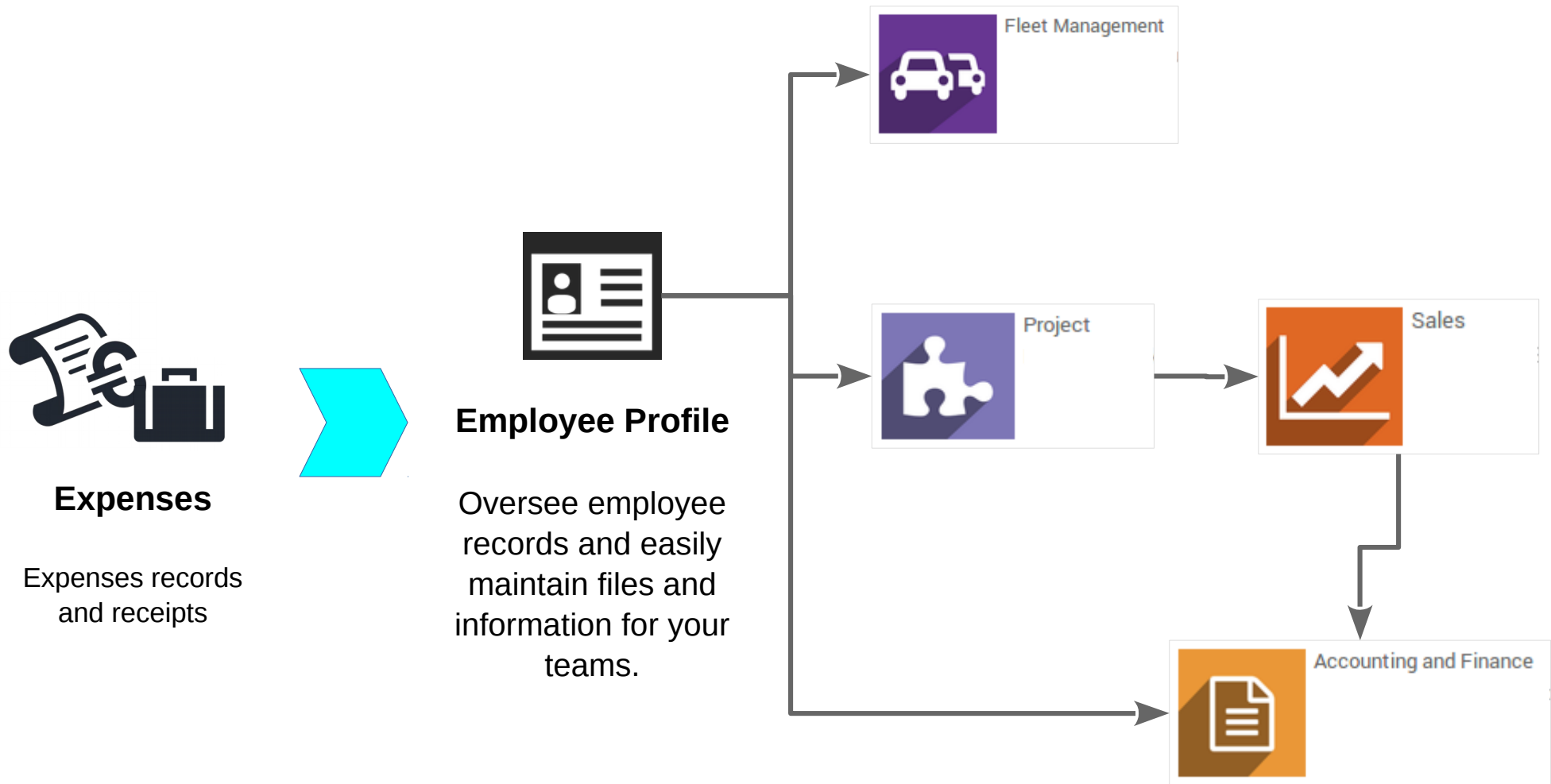
Comment, validate or refuse expenses, and add or edit information.



Accountants

Record expenses in the books and proceed to the payments and invoicing.

odoo Integration with other Odoo Apps



odoo Record expenses

Expenses

My ExpensesTo ApproveAccountantReportsConfiguration

📞🔋🕒 24💬✕👤 Administrator

My Expenses to Submit / New

SAVEDISCARD

SUBMIT TO MANAGER

TO SUBMITREPORTEDPOSTED

0 Documents

Expense Description

e.g. Lunch with Customer

Product

Unit Price

Quantity

\$0.00

1.000

Bill Reference

Date

Account

Employee

Analytic Account

12/15/2016

220000 Expenses

Pieter Parker

Total

\$0.00

Payment By

☒ Employee (to reimburse)

☐ Company

Notes...

odoo Streamlined expense management

Expenses

My Expenses

To Approve

Reporting

Configuration

@ 21 Administrator

Expenses to Approve

Expenses Month x Search...

CREATE

Filters Group By Favorites

June 2016	July 2016	August 2016	September 2016
<div>Office furnitures122.30 Ashley Presley 08/01/2016 Refused</div>	<div>Hotel Accomodation460.00 David Samson 07/12/2016 To submit</div>	<div>Fuel42.80 Ashley Presley 08/01/2016 Refused</div>	<div>Car rental125.50 Pieter Parker 09/14/2016 Submitted</div>
<div>Taxi travel55.80 Pieter Parker 08/01/2016 To submit</div>	<div>Gifts baskets214.70 Hans Anders 07/12/2016 Submitted</div>	<div>Parking ticket9.20 Famke Jenssens 08/02/2016 To submit</div>	<div>Flight to NYC980.00 Pieter Parker 09/14/2016 Approved</div>
<div>Flight to Brussels805.50 Ashley Presley 08/01/2016 To submit</div>	<div>Newspapers8.50 Pieter Parker 07/18/2016 Approved</div>	<div>Business lunch276.00 Antoine Langlais 08/16/2016 To submit</div>	
<div>Advertising1899.80 Ashley Presley 08/01/2016 Submitted</div>		<div>Lodging2130.00 Pieter Parker 08/24/2016 Approved</div>	
<div>Fuel42.80 Ashley Presley 08/01/2016 Approved</div>			

Exercise : Employee profile / Timesheets / Leaves

All Directors of « Canadian Colors Inc » participated in the Annual National Congress of Decoration which carried out in the Unit States in the city of Chicago. The participants of this activity executed the following expenses :

Expense Description	Product	Unit fo Measure	Unit price	Quantity	Total	Currency	Bill Ref.
Hotel Expenses	[HA0] Hotel Accommodation	Unit	400,00	5,00	2 000,00	USD	HT001
Transfers in the city of Chicago	[CarTRA] Car Travel Expenses	Km	0,30	622,00	186,60	USD	KM002
Travel by Air	[AT] Air Flight	Km	530,00	1,00	530,00	CAD	ACAD003

TO DO

- Create the new employee profile as director for this company. Invent the information that is necessary.
- Record all expenses for this employee
- Create and link all expenses to « Annual National Congress of Decorarion - Chicago » as Analytical Account.

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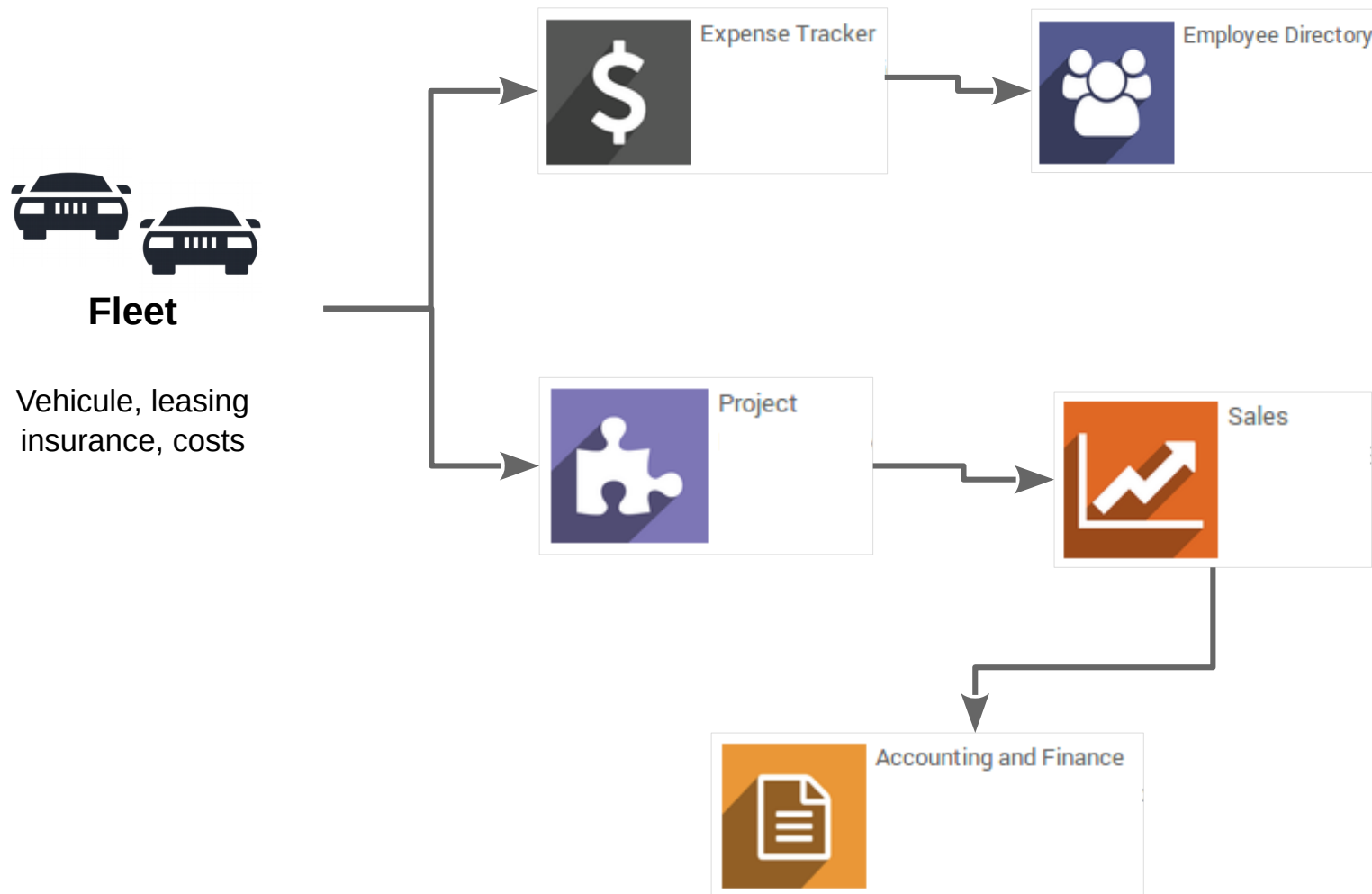
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Fleet Management

odoo Fleet Management

- Track company vehicles, mileage logs, maintenance schedules, contracts and more with clean and organized fleet management.
- Organize the services around the vehicles and communicate with the qualified service providers, manage invoices and notes.
- Monitor all costs for each of the fleet vehicles.

odoo Integration with other Odoo Apps



Questions?



Contributions

This document has been authored and distributed by the functional team of Odoo, Savoir-faire Linux :

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- Mickaël Brard
- Marc Lijour
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<https://github.com/savoirfairelinux/training-odoo>



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