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

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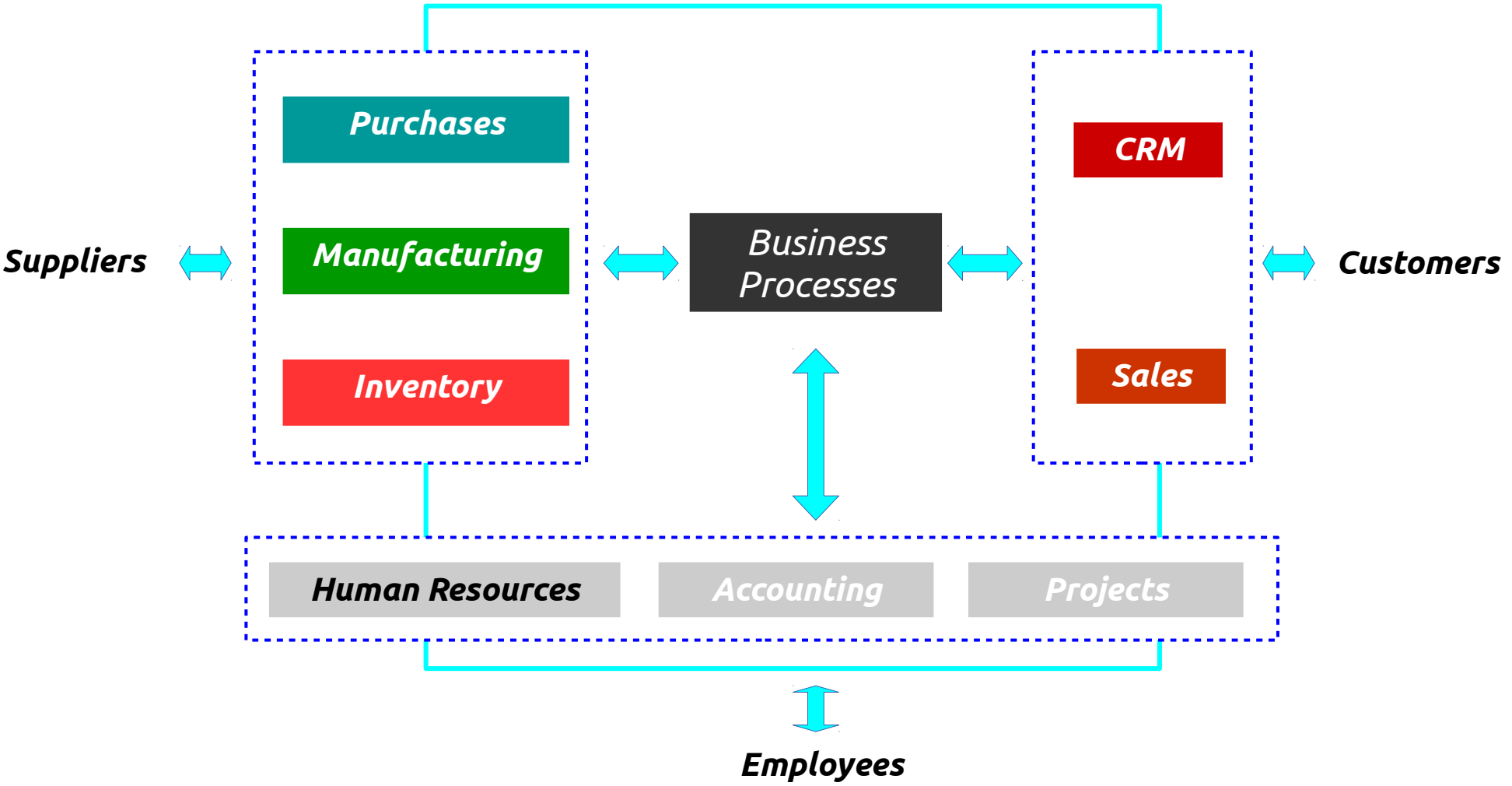
Summing-up

Integrated Business Process with Odoo



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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 funtion
- Reward management
- Using information in HR for cross-sectional operations

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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

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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

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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

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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)

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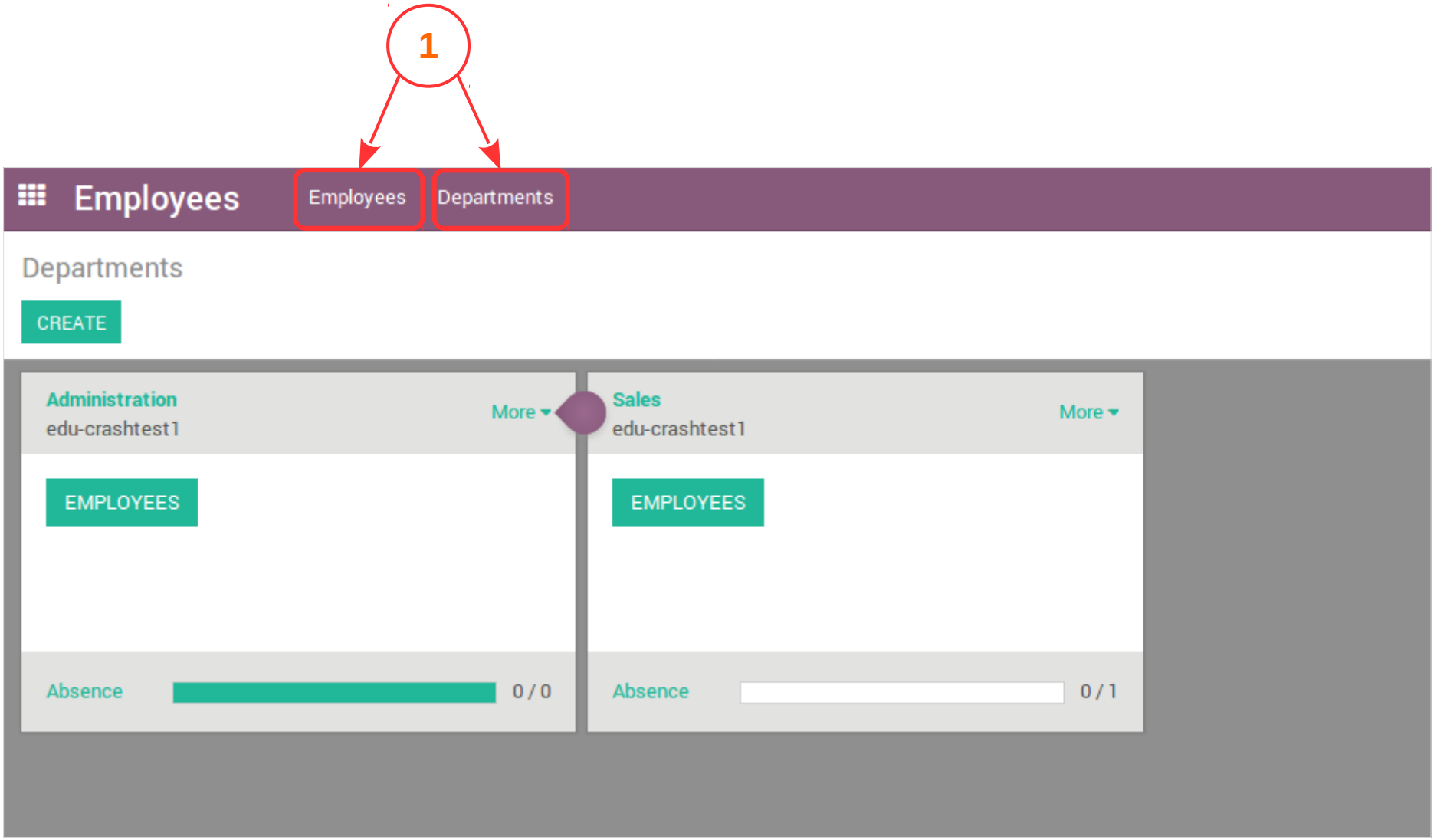
odoo Employees



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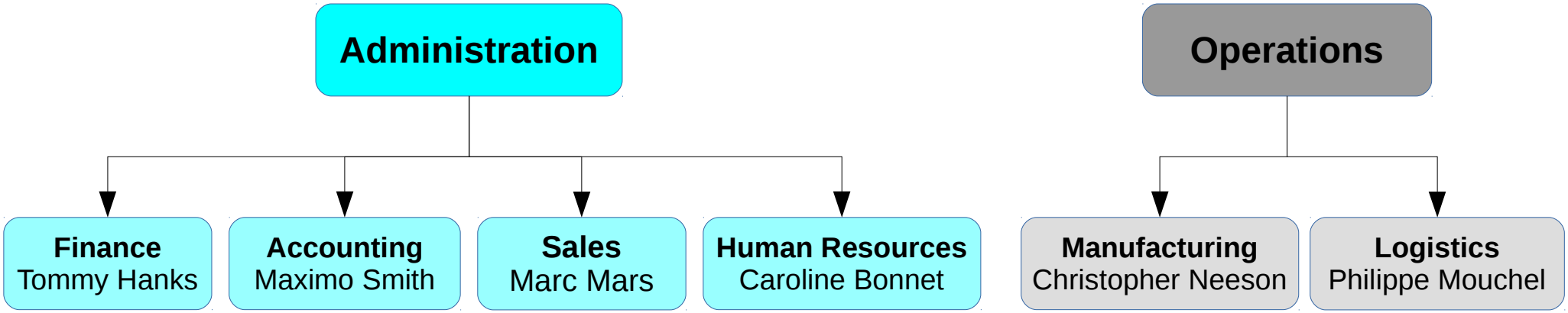
30 min

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.*

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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

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Selection Process

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

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15 min

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.*

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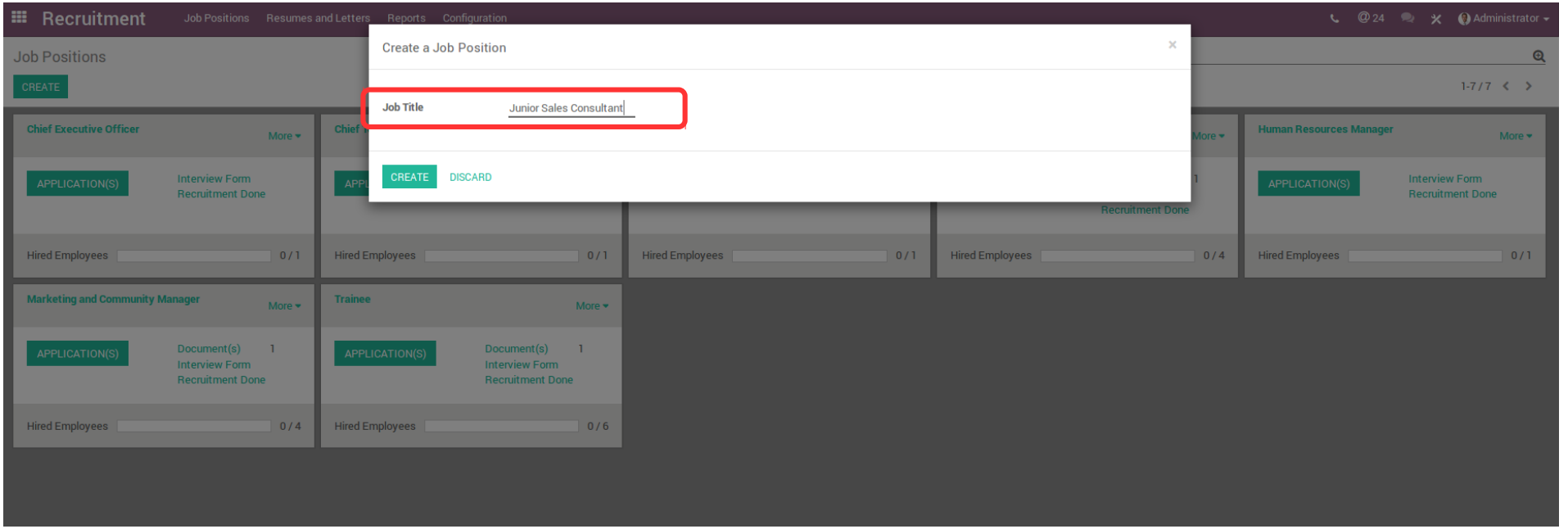
odoo Hiring Process



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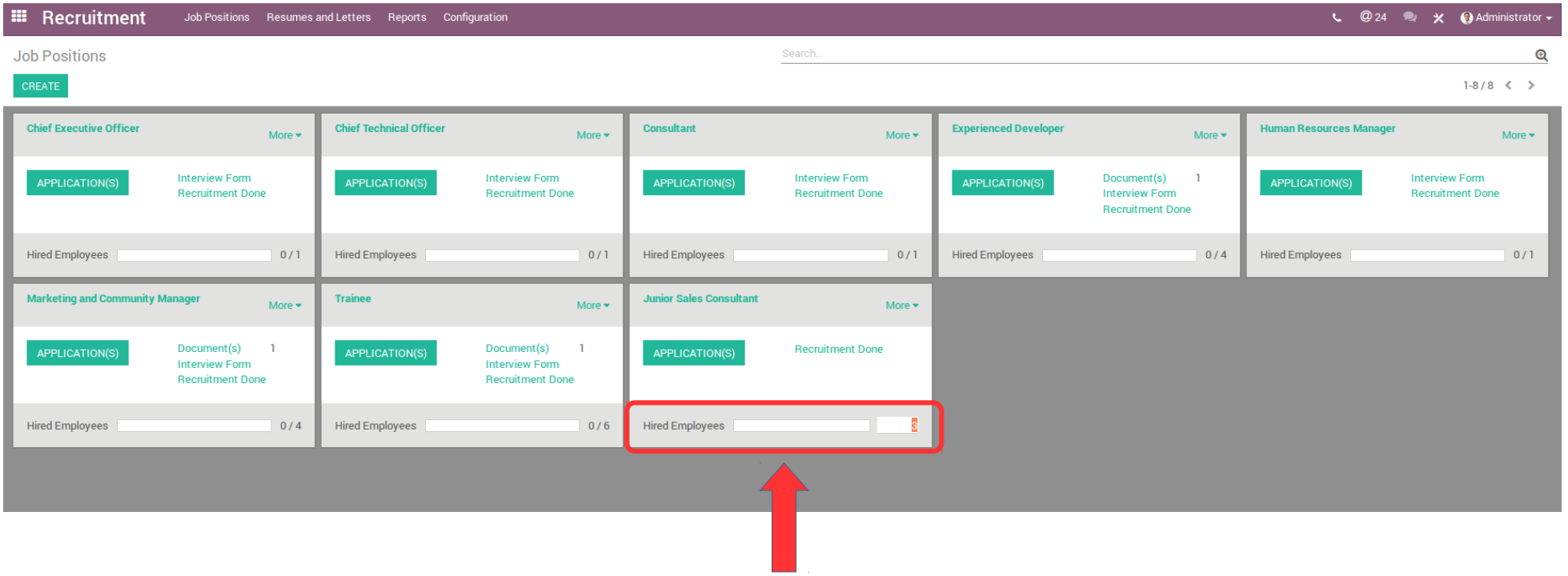

vacancies

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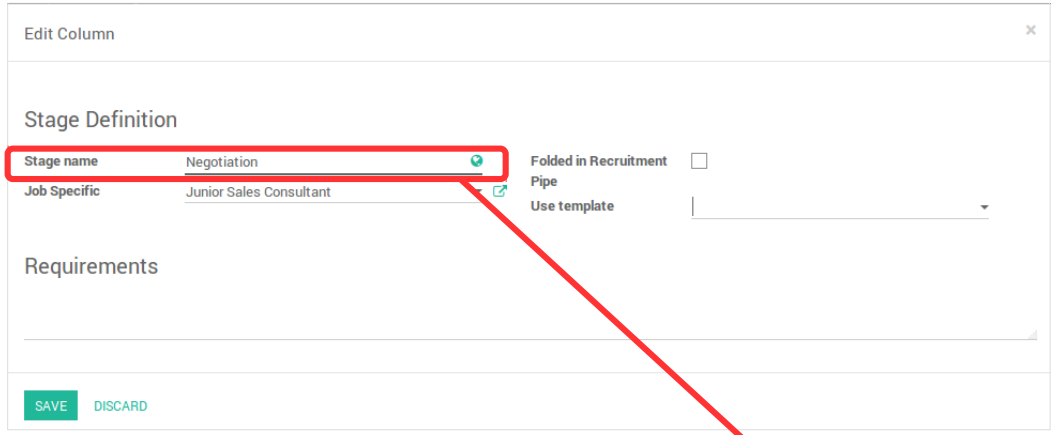
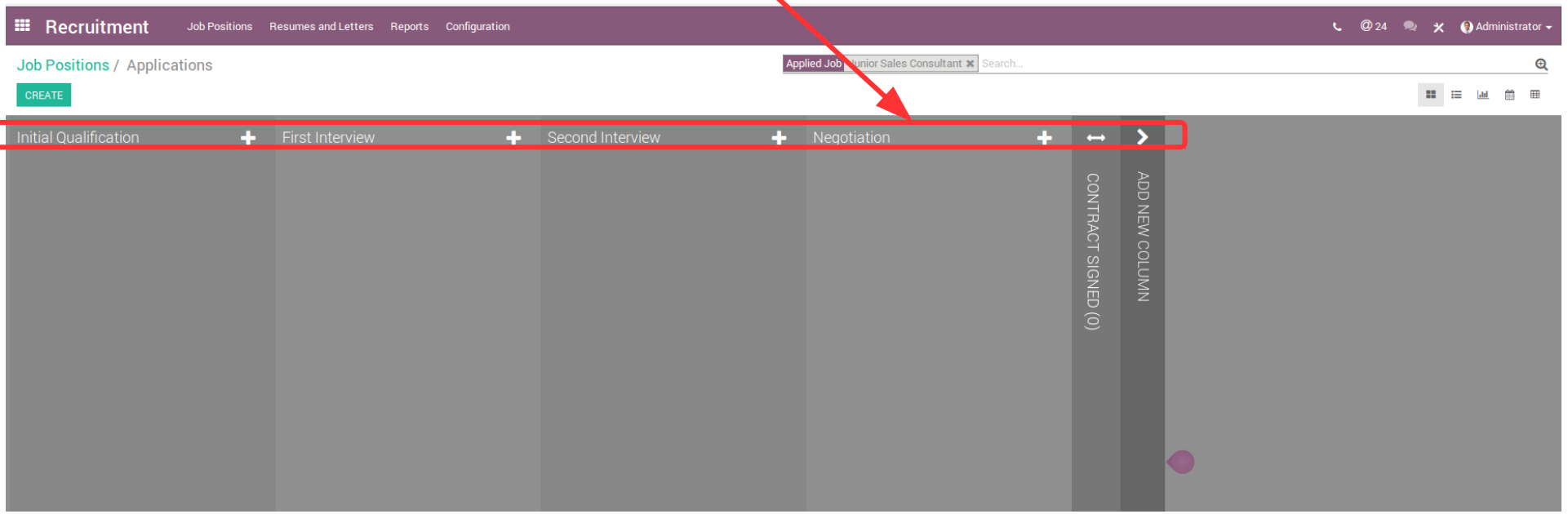
Steps of the recruitment process





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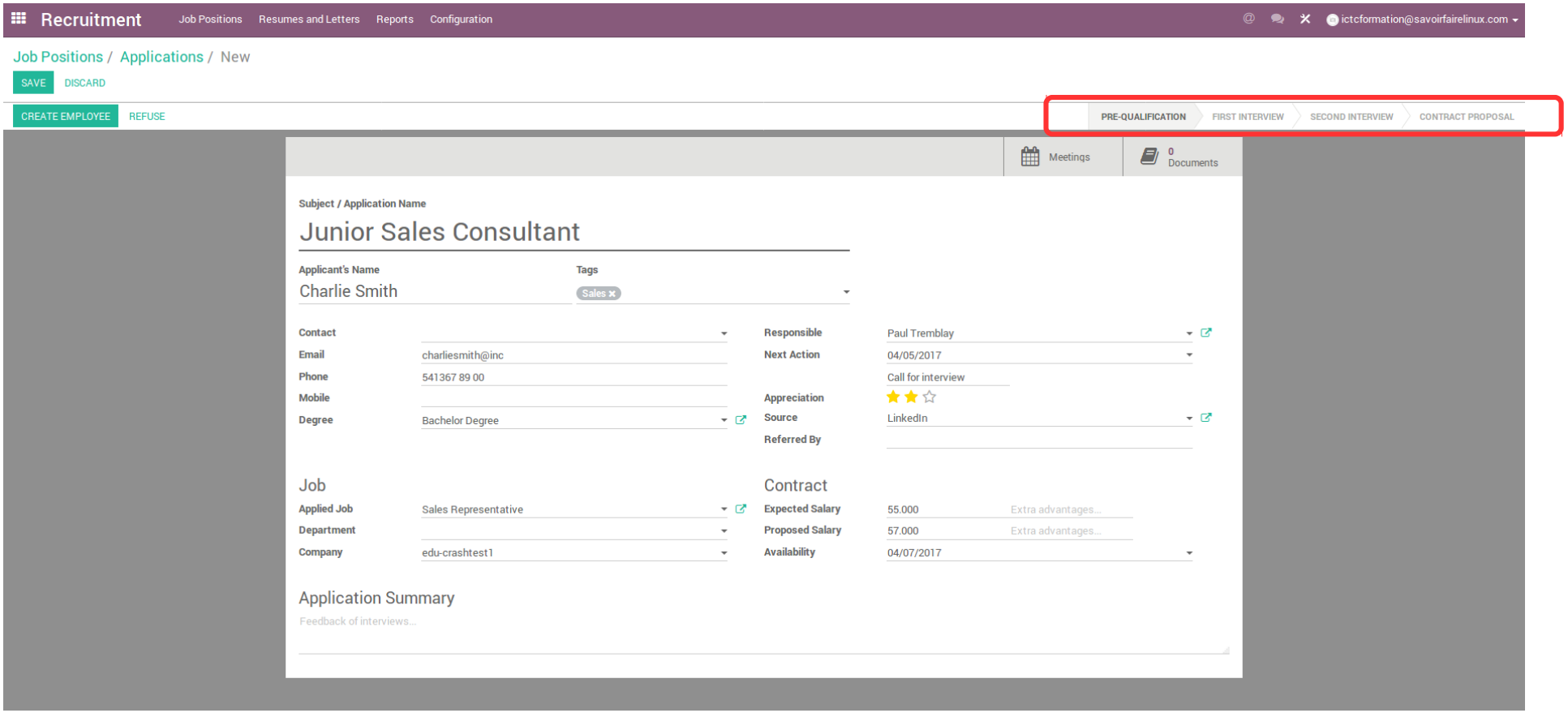
odoo Candidate Applications



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60 min

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.*

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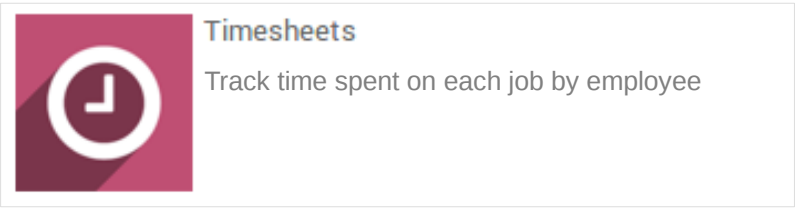
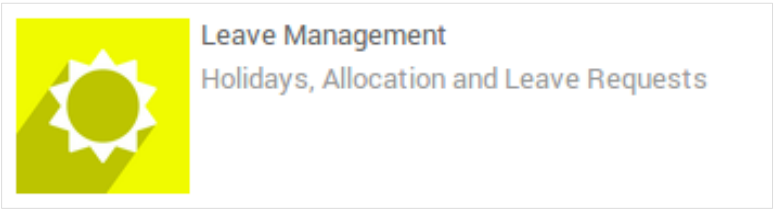
Timesheets & Leaves

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.





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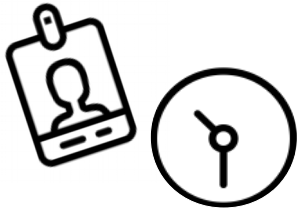
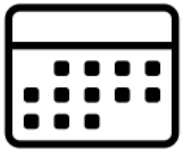
Integration with other Odoo Apps



Timesheets

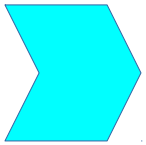
Record time spend on each job by employee

\+



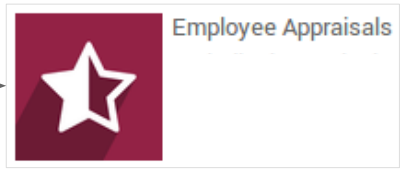
Attendance

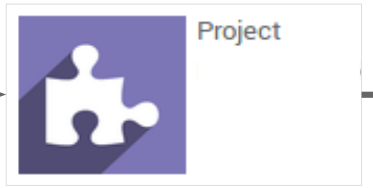
Tracking for employee vacation and sick days

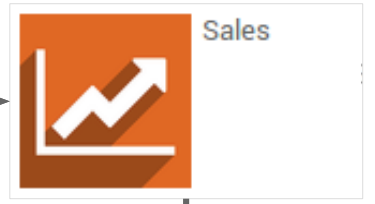


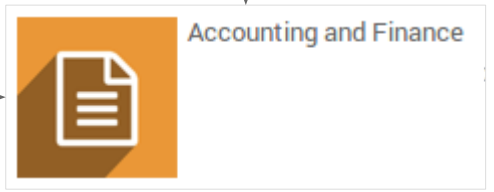
Employee Profile

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









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45 min

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*

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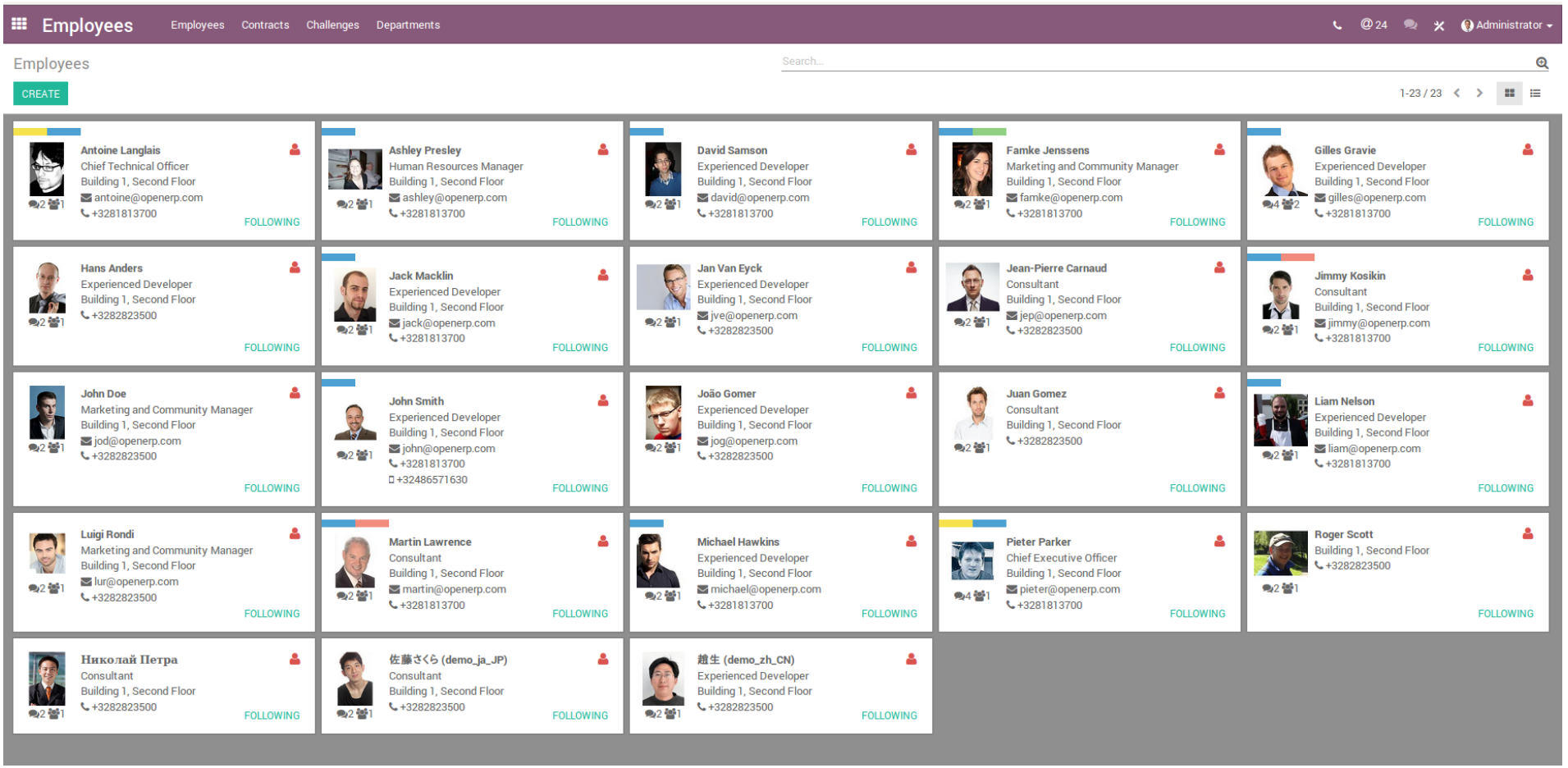
odoo Employee Profile



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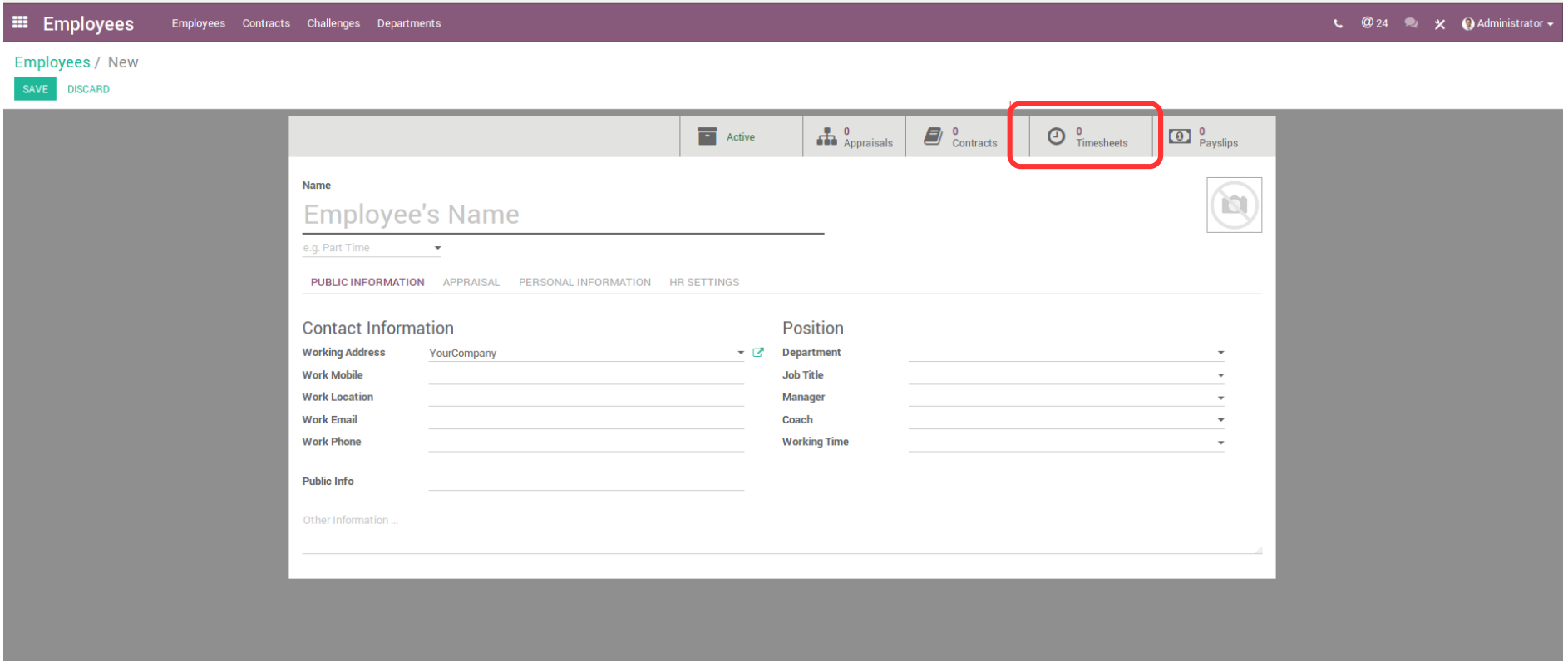

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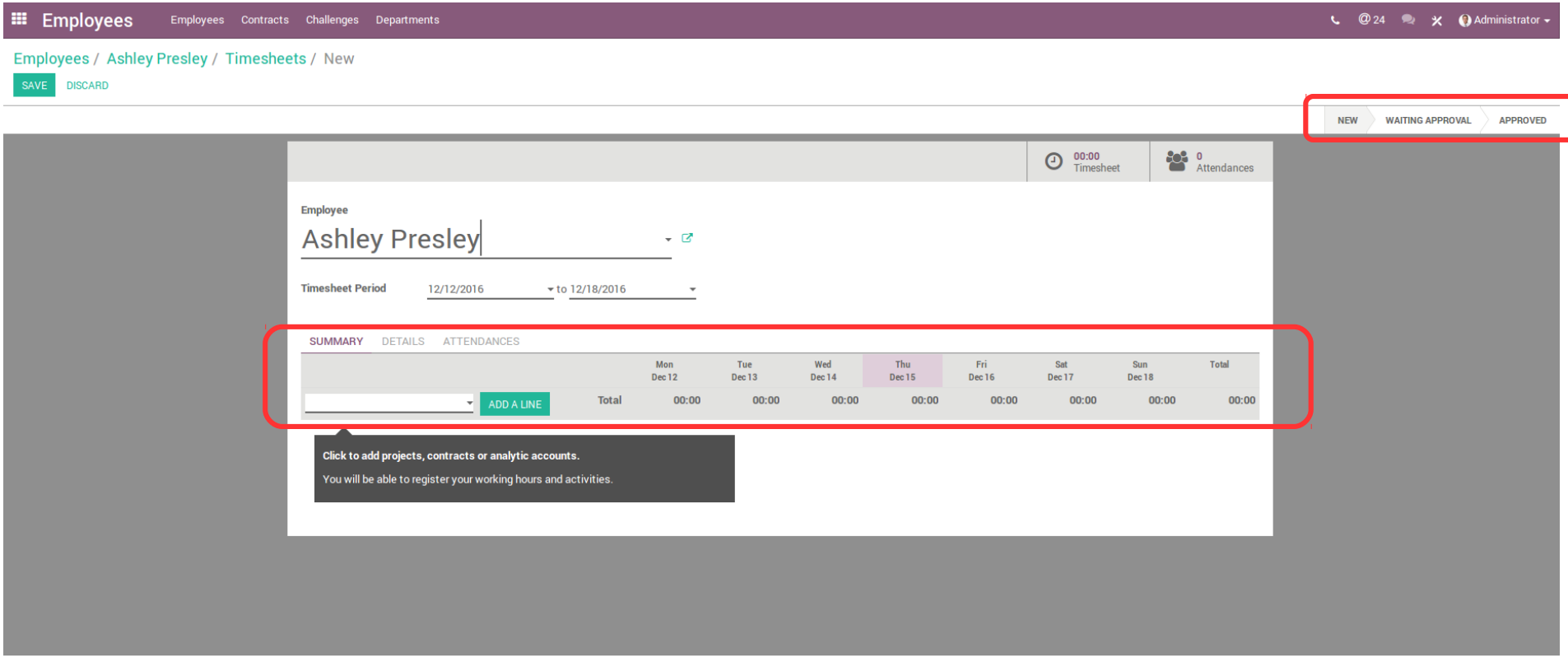
odoo Timesheets



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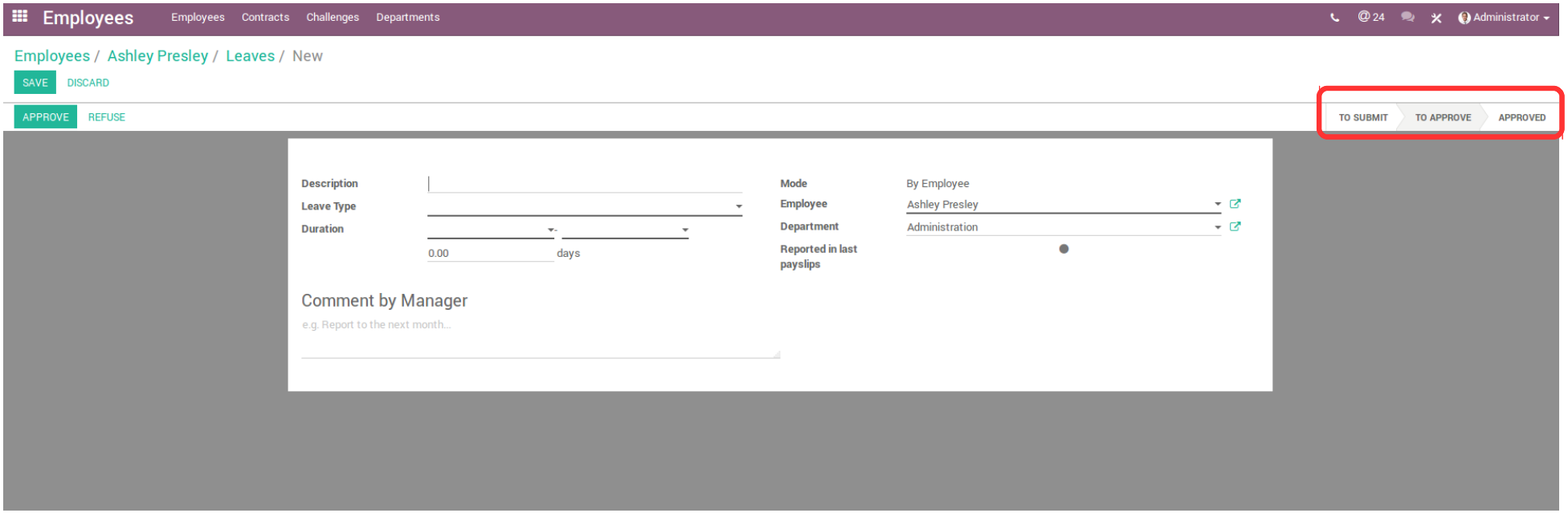
odoo Attendance & Leaves



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Employee Appraisals

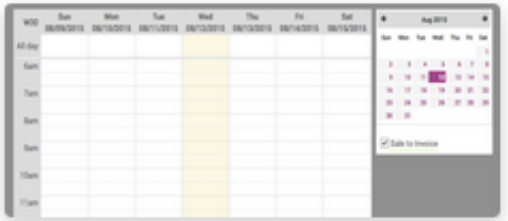
odoo Employee Appraisals

- 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.

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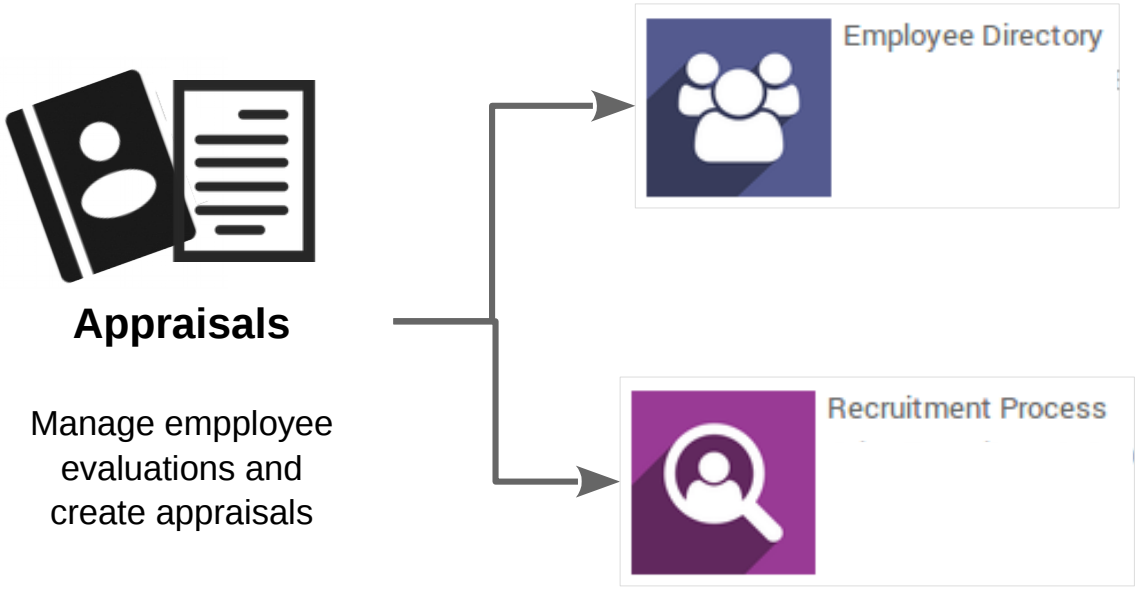
Integration with other Odoo Apps



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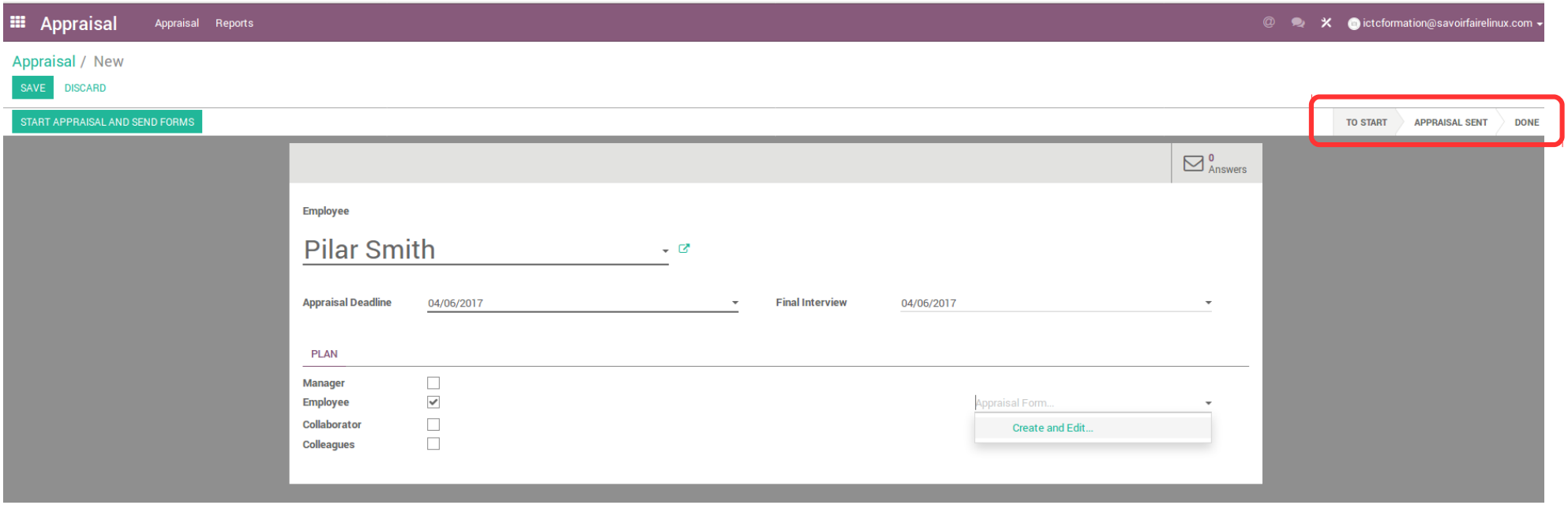
odoo Set up appraisals



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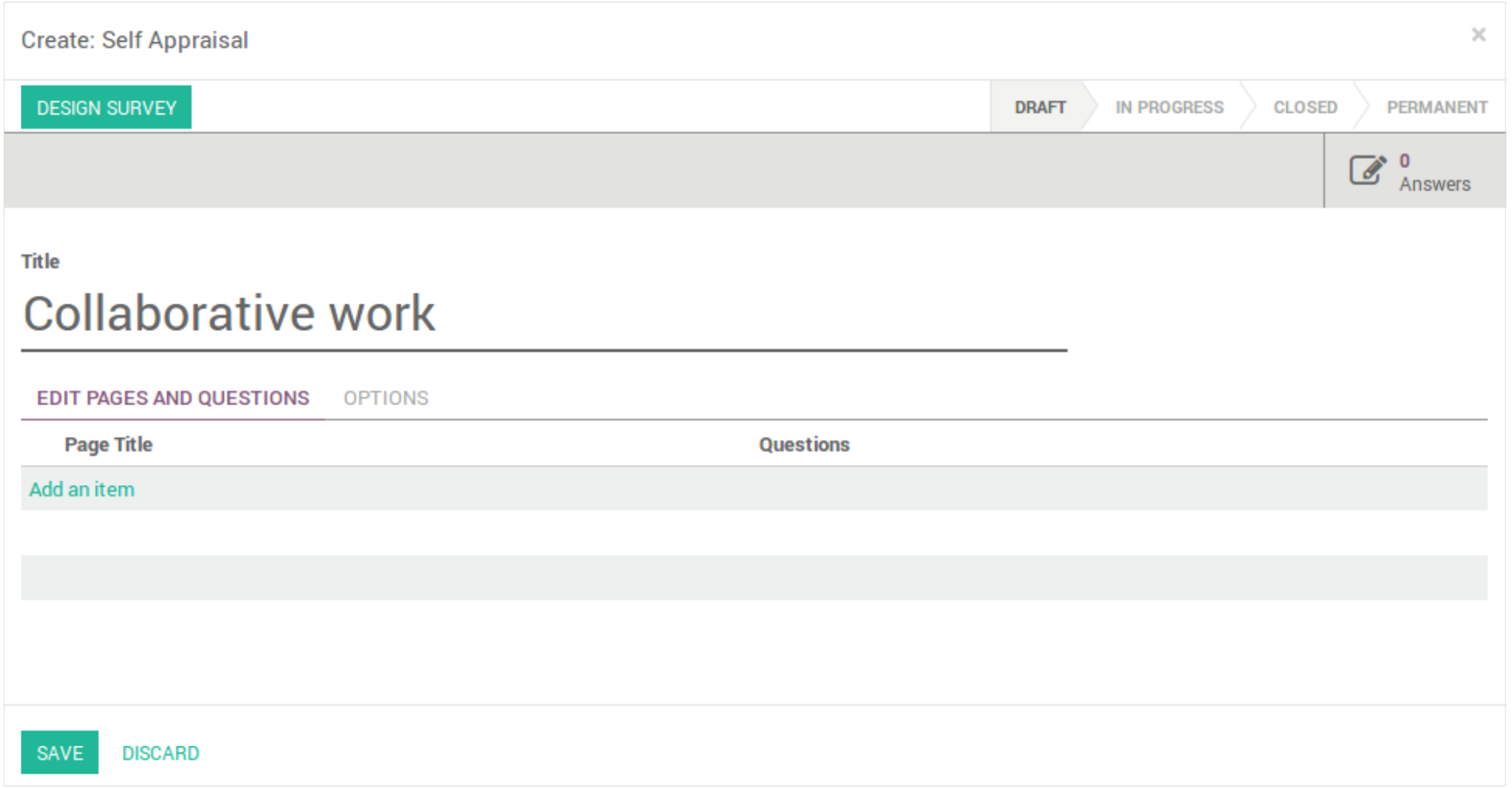
odoo Set up appraisals



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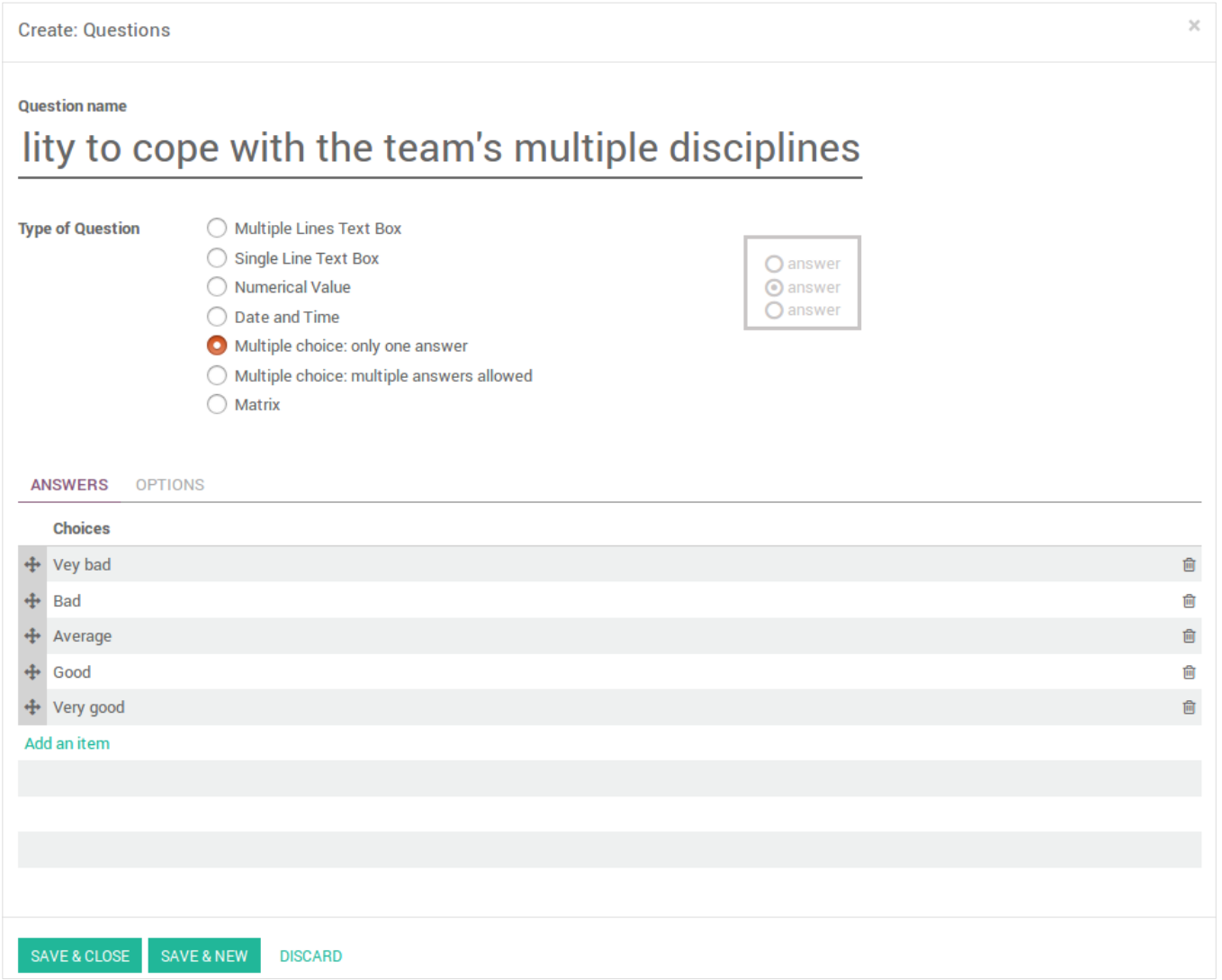
odoo Set up appraisals



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30 min

Exercise : Set up an appraisal

« Canadian Colors Inc » Human Resources wants to make a survey fo 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 / assignations					
Compliance to internal rules and processes					
Ability to work efficiently with peers					
Initiative and autnonmy					
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.

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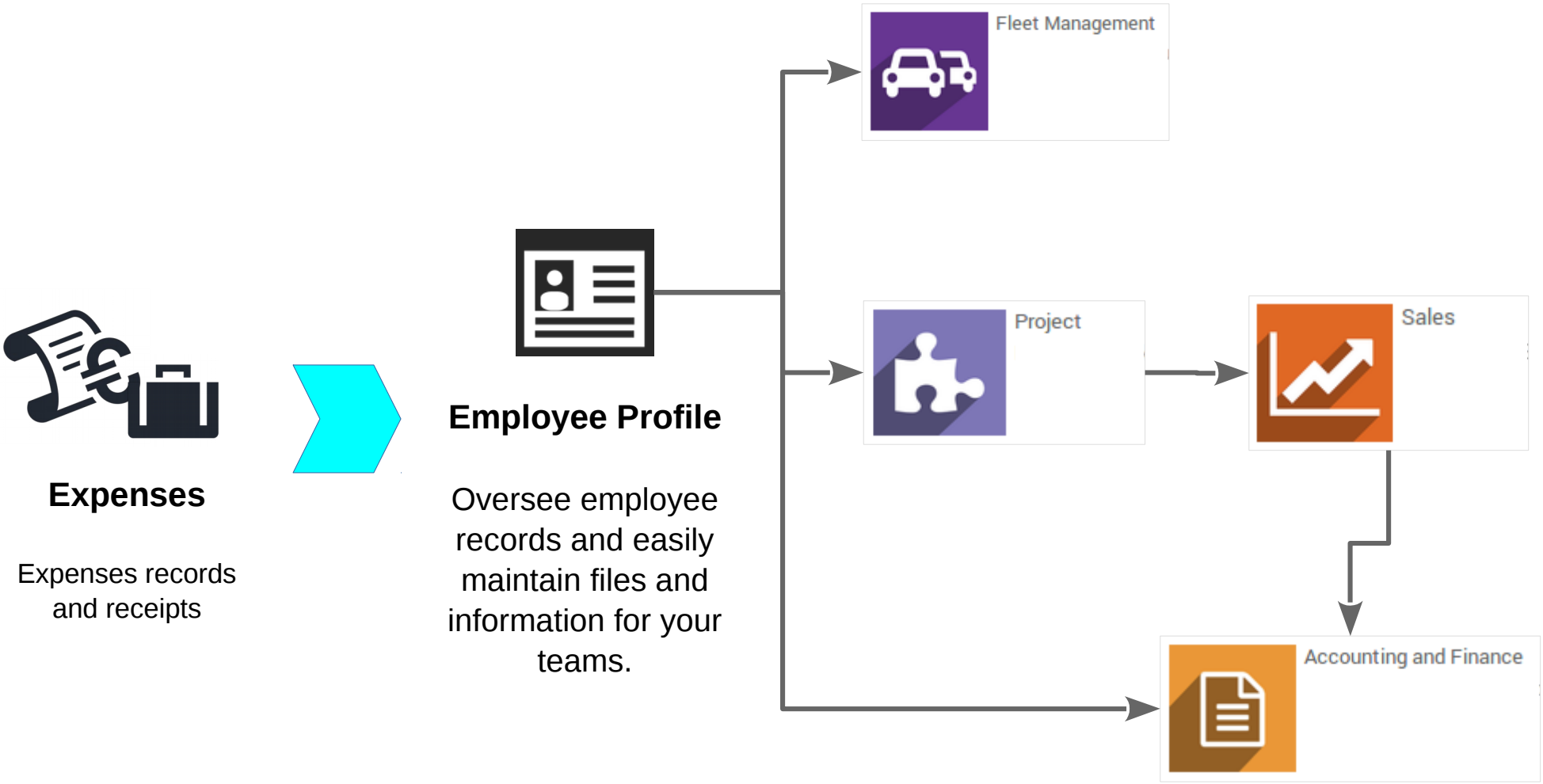
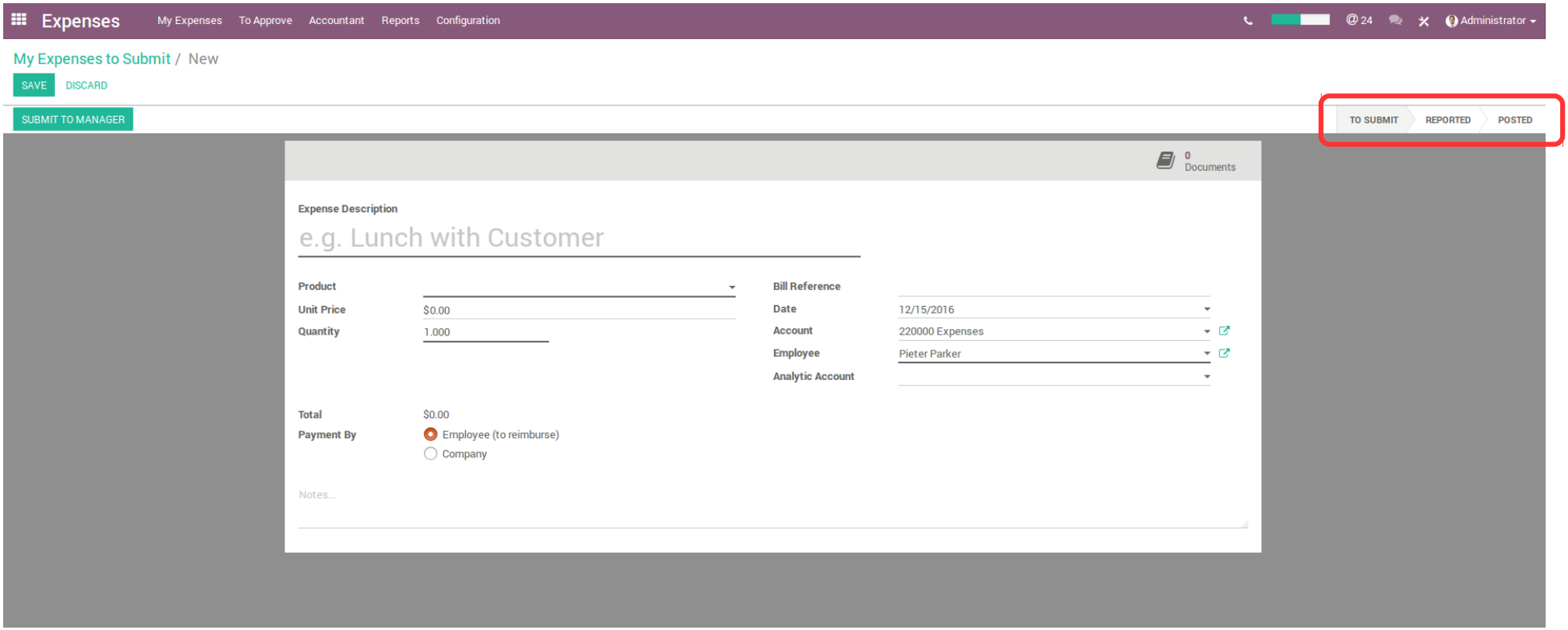
Integration with other Odoo Apps



odoo Record expenses



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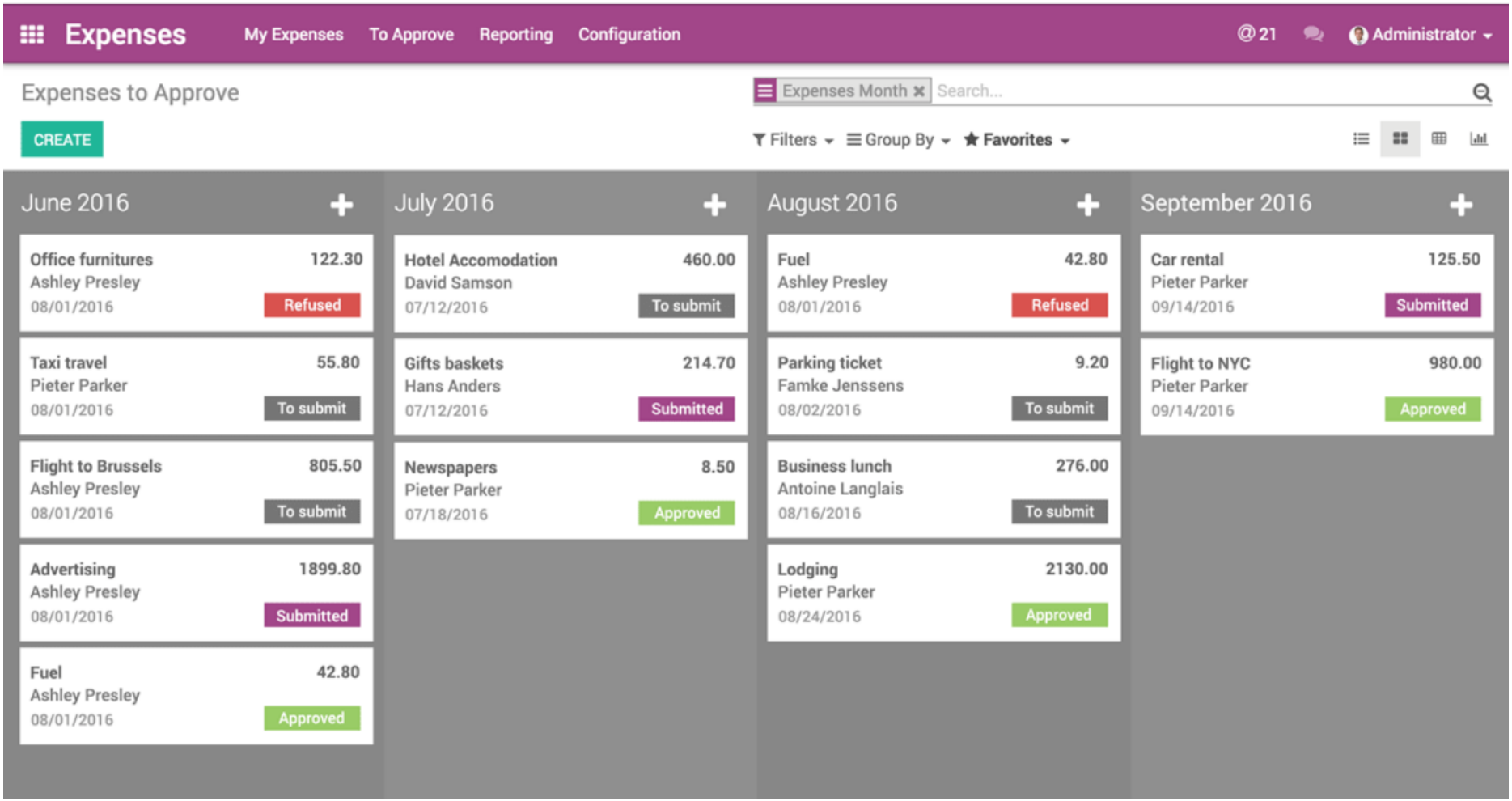
odoo Streamlined expense management



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30 min

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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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.

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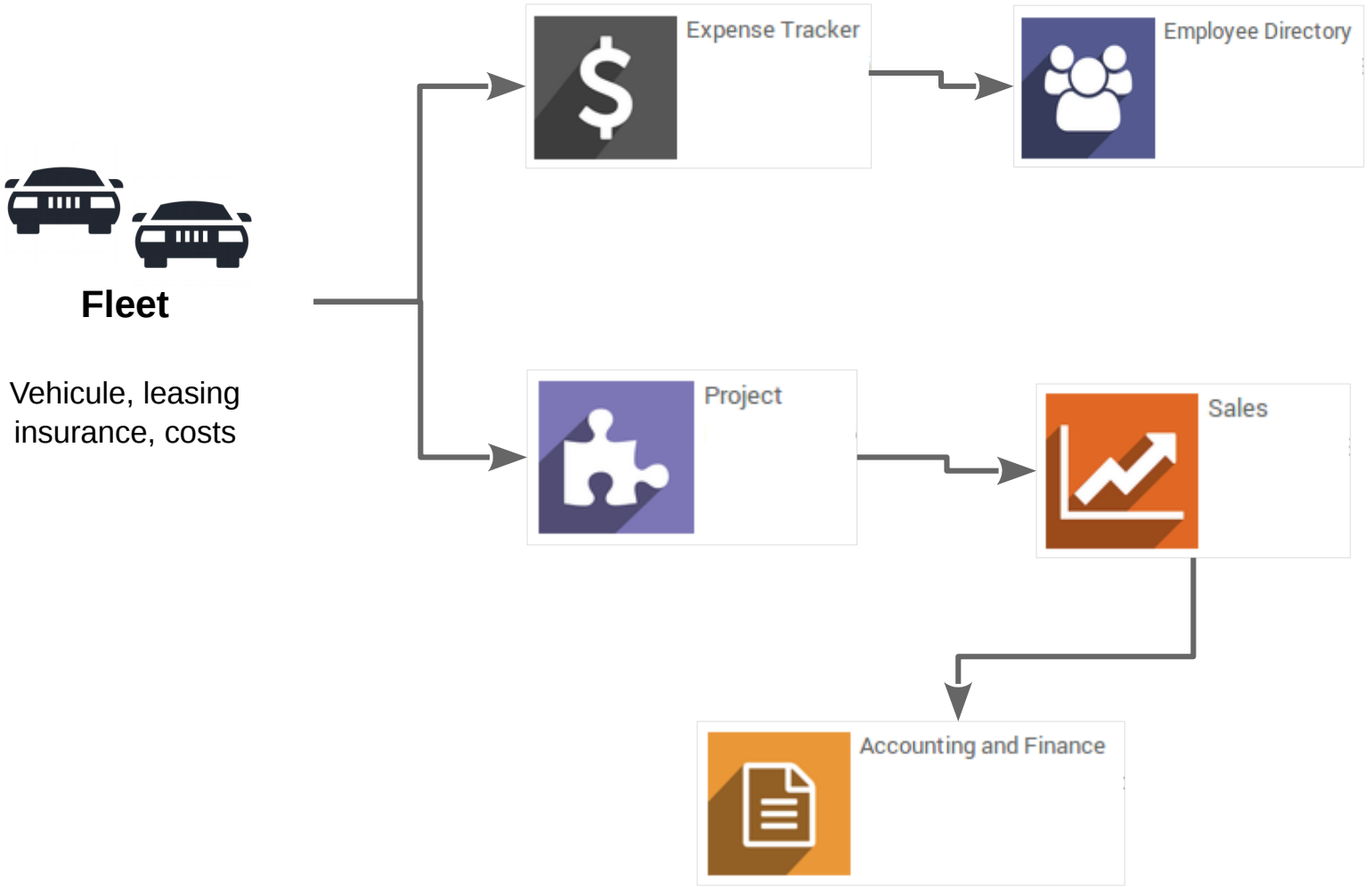
Integration with other Odoo Apps



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Questions?

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Contributions

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

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- Guillaume Lot

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https://github.com/savoirfairelinux/training-odoo

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IT Management Solutions