

Automatic Leave Allocation in Odoo (with Accrual Plan and Vacation Planning)

This manual provides a step-by-step guide for setting up automatic leave allocation in Odoo, creating accrual plans, and managing the vacation planning process. The final step ensures legal compliance by helping HR efficiently manage employee vacation schedules and avoid potential financial penalties.

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Introduction

Automatic leave allocation in Odoo, combined with vacation planning, allows HR managers to comply with legal regulations and optimize workforce management. The system ensures that leave entitlements are automatically granted, while the final step helps plan when employees should take their vacations, avoiding disruptions and legal issues.

Prerequisites

Before you begin, ensure:

- The **Time Off** module is activated in Odoo.
 - The module `acs_automatic_leave_allocation` is activated in Odoo
 - You have the necessary permissions to manage leave allocations, accruals, and vacation planning.
-

Setting Up Automatic Leave Allocation

1. Enable the Time Off (Leave) Module

- Go to the **Apps** menu.
- Search for the **Time Off** module.
- Install the module if not already activated.

2. Create an Accrual Plan

- Navigate to **Time Off > Configuration > Accrual Plans**.
- Create a new accrual plan with rules specific to anual leave.

In this example, adds 2,5 days monthly on the first day of the month, limit of 90 days
Accrued Leave Carryover.

Check local labor laws regarding leave carryover into the next fiscal year. Some countries mandate that unused leave is forfeited, while others allow a limited number of days to be carried over.

Accrual Plans / Asignación automática de vacaciones anuales

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15 Employees

Name Asignación automática de vacaciones anuales **Time Off Type** Annual Leave

Level Transition Immediately After this accrual's period

Rules

+ Add a new level

Level 1 Starts immediately after allocation start date

Adds 2 Days

Monthly on the 1 day of the month

Limit of 90 Days

At the end of the year, unused accruals will be postponed

Open: Level ✕

Start after day(s) after allocation date

Based on worked time

Rate Days

Frequency Monthly

on the of the month

Limit to Days

At the end of the calendar year, unused accruals will be Transferred to the next year

Save Discard Remove

- Save the plan.

3. Configure Leave Types

- Go to **Time Off > Configuration > Leave Types**.

- Create or edit a leave type.
- **Requires Allocation:** Set this to **Yes** to ensure that leave is only available to employees with an allocation request.
- **Create Auto Allocation:** Set this to **True** so that Odoo identify which leave type Will automatically generates leave allocations for employees based on the accrual plan.

Time Off Types / Annual Leave

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16,00 Allocations
11,00 Time Off
1,00 Accruals

Annual Leave EN

Time Off Requests

Approval

No Validation

By Time Off Officer

By Employee's Approver

By Employee's Approver and Time Off Officer

Responsible Time Off Officer: Gabriela Lacmago

Take Time Off in: Day

Minimum Time-Off Duration: 0,00 Hour(s)

Allow To Join Supporting Document:

Allocation Requests

Requires allocation Yes No Limit

Employee Requests

Extra Days Requests Allowed

Not Allowed

Approval

Approved by Time Off Officer

Set by Time Off Officer

Create Auto Allocation

- Save the leave type.

4. Create Leave Allocation Requests

- Go to **Time Off > Managers > Allocation Requests**.
- Create an allocation request that Will be used by the system as a template for the entire company.

Allocations / Allocation of Annual Leave : 0.00 days to iSuite

✓ Save ✕ Discard 16 / 16 < >

Confirm To Submit To Approve Approved

Automatic Allocations of Annual leave

Time Off Type: Annual Leave

Allocation Type: Accrual Allocation

Accrual Plan: Asignación automática de vacaciones anuales

Start Date: 01/01/2024 Run until: No Limit

Use contract start date:

Duration: 0,00 Days

do not delete this template

Mode: By Company

Contract start date:

Company: iSuite

The **time off type** should be the one defined in section 3

The allocation type must be **Accrual Allocation**

The **accrual plan** must be selected. Use the one created in section 2.

Use contract start date must be set to true

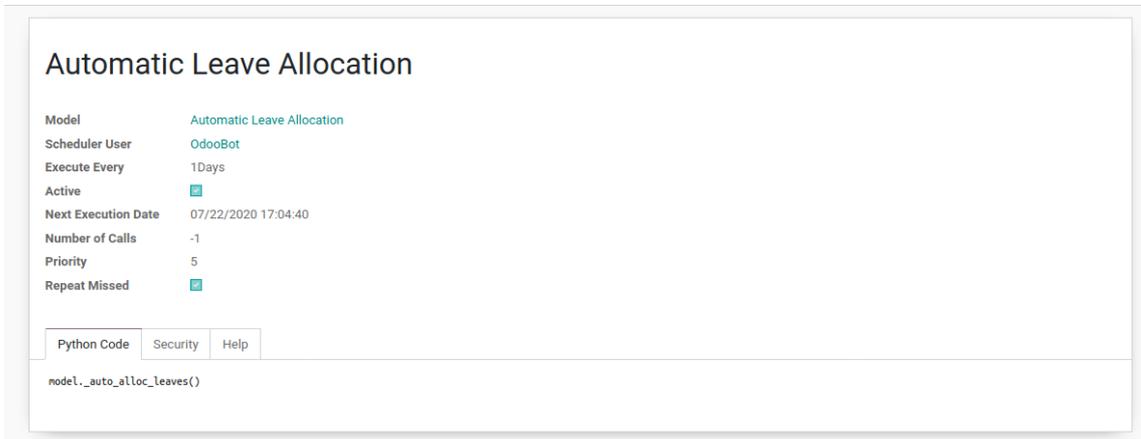
Start date should be the beginning of a year

Mode should be **by company**

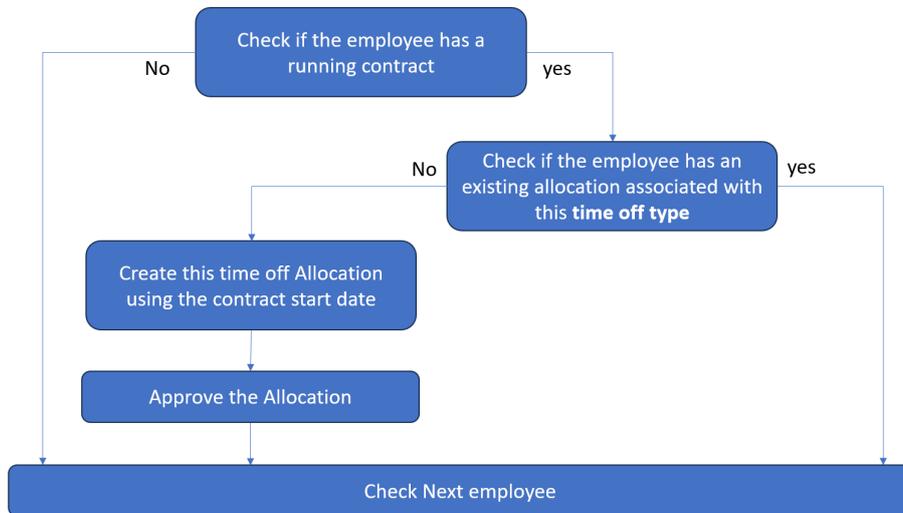
- Approve the request.

5. Automate Leave Allocations

- Set up scheduled actions to automate the allocation process, ensuring leave is granted periodically according to your accrual plan.



If the module `acs_automatic_leave_allocation` is installed, the automated task Will be running, no need to create additional task. During the execution of this task, the following conditions are verified:



Once the task has been executed, you Will get all the allocations created and approved automatically as follow:

Allocations

/ Allocation of Annual Leave : 7.50 days to Anita Oliver

[Edit](#) [+ Create](#) [Action](#)
1 / 15 [←](#) [→](#)

[Refuse](#) [To Submit](#) [To Approve](#) [Approved](#)

Asignación automática de vacaciones anuales

Time Off Type	Annual Leave	Mode	By Employee
Allocation Type	<input type="radio"/> Regular Allocation <input type="radio"/> Accrual Allocation	Employee	Anita Oliver
Accrual Plan	Asignación automática de vacaciones anuales		
Start Date	01/07/2024 Run until No limit	Contract start date	01/07/2024
Use contract start date	<input checked="" type="checkbox"/>		
Duration	7,50 Days		

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October 2, 2024

OdooBot - 10 days ago

- Number of Days: 0,00 → 7,50

OdooBot - 10 days ago

This allocation have already ran once, any modification won't be effective to the days allocated to the employee. If you need to change the configuration of the allocation, cancel and create a new one.

October 1, 2024

OdooBot - 11 days ago

Allocation Approval done (originally assigned to Gabriela Lacmago)

Original note:
New Allocation Request created by OdooBot: 0.0 Days of Paid Time Off

OdooBot - 11 days ago

Time Off Allocation created

Vacation Planning and Compliance

Once the leave allocations have been automatically generated and approved, the next critical step is to **plan when employees should take their vacations**. This process is crucial for legal compliance, maintaining productivity, and ensuring business continuity.

Why Vacation Planning is Important

- **Legal Compliance:** Many countries have laws requiring companies to ensure employees take their annual leave. Failure to comply could lead to financial penalties.
- **Workforce Management:** Properly planned vacations prevent resource shortages, helping departments run smoothly.
- **Employee Well-being:** Ensuring employees take regular time off improves job satisfaction and reduces burnout.

Challenges with Manual Planning

Planning vacations manually, especially for large teams, can be overwhelming. It requires considering:

- Availability of employees.

- Business needs during certain periods.
- Team schedules to avoid understaffing.

Steps for Efficient Vacation Planning in Odoo

1. Generate the Employee Leave Overview

- Go to **Time Off > Reporting > Time Off Summary**.
- This report provides an overview of allocated, used, and remaining leave days for each employee.
- Export this report for planning purposes or to consult with department managers.

2. Plan Vacations Based on Business Needs

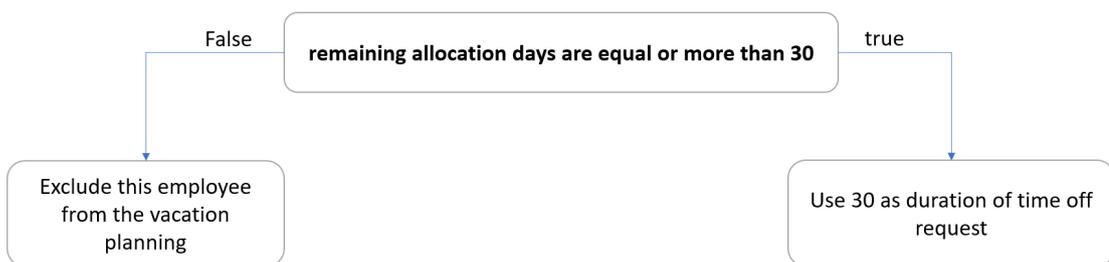
- Meet with department heads to determine the ideal periods for employees to take their leave.
- Ensure that critical periods (e.g., year-end, major projects) have enough staffing.

3. Automate Vacation Scheduling

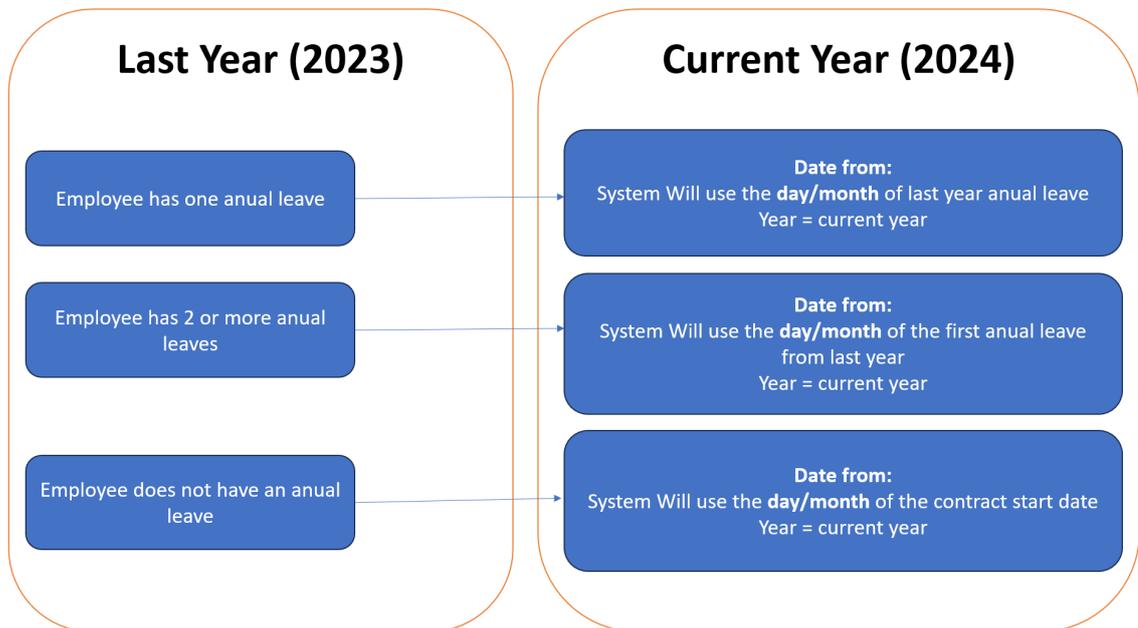
- Use this Odoo's Time Off Planning feature to assign leave dates to employees. Go to **Time Off > Approvals > Allocations**.

Employee	Allocation Type	Duration	Allocation Type	Status
Anita Oliver	Annual Leave	7.5 days	Accrual Allocation	Approved
Elsa Mangué	Annual Leave	37.5 days	Accrual Allocation	Approved
Almighty CS	Annual Leave	7.83 days	Accrual Allocation	Approved
Alfredo MBA	Annual Leave	68.08 days	Accrual Allocation	Approved
Erica Nguema	Annual Leave	77.68 days	Accrual Allocation	Approved
Gabriela Lacmago	Annual Leave	55.17 days	Accrual Allocation	Approved
MAHAMAT DAOUD	Annual Leave	21.37 days	Accrual Allocation	Approved
Abigail EDU	Annual Leave	78.75 days	Accrual Allocation	Approved
Audrey Peterson	Annual Leave	55.25 days	Accrual Allocation	Approved
Cristina Obiang	Annual Leave	67.83 days	Accrual Allocation	Approved
Mamadou Diarra	Annual Leave	79.29 days	Accrual Allocation	Approved
Pablo Esono	Annual Leave	67.5 days	Accrual Allocation	Approved
Ronnie Hart	Annual Leave	81.94 days	Accrual Allocation	Approved
Magdalena Abia	Annual Leave	67.5 days	Accrual Allocation	Approved

- Select the existing approved Allocations
- Go to **Action > Create Time Off request**
- During the execution of this action, the system Will check the remaining allocated days of each employee and make a decision based on the following workflow:



- The system Will also define **time off start date** (date from) based on the following criterias



- After this action, all the time off Will be created in draft mode.

All Time Off / on Annual Leave2: 1.00 days (30/05/2024)

Save Discard

Approve Refuse Adjust Dates Mark as Draft To Approve Approved

Mode	By Employee
Company	iSuite
Employees	Alden Hughes
Time Off Type	Annual Leave (60 remaining out of 90 da
Dates	From 01/06/2024 To 30/06/2024
Duration	30,00 Days
Return Date	0

Date from: Is set automatically using previous leave date or contract start date

Date to: Is calculated automatically using the default duration of 30 days

Default = 30

- You can view a calendar view of employee leaves, making it easy to plan around busy periods.

4. Send Vacation Notifications

- Once the schedule is finalized, communicate the approved vacation plan to employees.
- Odoo allows you to send automated notifications about scheduled leave to employees and their managers, ensuring everyone is informed.

5. Monitor Leave Balances

- Ensure that leave entitlements are used up before the end of the year, as required by labor laws in many countries.

- Regularly check leave balances using the **Time Off Summary** report to ensure employees are taking their allocated leave.
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Legal Compliance Tips

- **Plan Early:** Ensure vacation schedules are finalized well in advance to avoid last-minute conflicts.
 - **Document Everything:** Keep a record of approved and rejected leave requests to safeguard against disputes.
 - **Accrued Leave Carryover:** Check local labor laws regarding leave carryover into the next fiscal year. Some countries mandate that unused leave is forfeited, while others allow a limited number of days to be carried over.
-

FAQ

1. **How can I handle employees who have unused leave at the end of the year?**
 - In some jurisdictions, unused leave can be forfeited or carried over. You can adjust this in the leave type configuration by specifying carryover rules or using accrual limits.
 2. **Can I force employees to take leave during a certain period?**
 - Yes, you can schedule mandatory leave periods for employees using the **Time Off Planning** feature. This is common during company-wide shutdowns or low-demand periods.
 3. **What happens if an employee's leave request overlaps with another employee's vacation?**
 - Odoo's planning calendar allows you to spot conflicts in employee vacations and reschedule as necessary. Managers can refuse or suggest alternate dates for leave requests based on staffing needs.
 4. **Can I get alerts if employees are not using their leave?**
 - Yes, you can set up automated reports or reminders in Odoo to notify managers of employees who have unused leave, helping to ensure compliance and avoid end-of-year rushes.
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By following this improved workflow, you can not only automate leave allocations but also efficiently plan and manage employee vacations, ensuring compliance with legal regulations and optimizing business operations. Proper vacation planning in Odoo helps avoid operational disruptions and prevents potential legal and financial penalties related to employee leave entitlements.