

Employee Documents

A guide to employee documents: document types, adding documents, the expiry alerts, missing documents, renewing, access rights and the limits.

1. Start here

In plain words: A passport that expired last month, a residence permit nobody renewed, a driving licence that lapsed while the employee was driving the company car. **Employee Documents & Expiry Alerts** keeps every employee's documents in Odoo with their **expiry dates**, warns you **before** they expire, shows who is **missing** a required document and lets you **renew** in one click.

Employees	Document type	Document number	Issue Date	Expiry Date	Days left	Status
Audrey Hernandez	Residence permit	RP-2719492	Nov 16, 2021	Nov 16	-12	Expired
Noah Davis	Passport	P2280417	Oct 12, 2021	Oct 11	-12	Expired
Tina Williamson	Driving license	DL-5912-137	Oct 21, 2021	Oct 20	-5	Expired
Audrey Hernandez	Health insurance card	HI-88211	Nov 6, 2021	Nov 6	12	Valid
Jeffrey Kelly	Residence permit	RP-882104	Nov 16, 2021	Nov 16	21	Valid
Miguel Hernandez	Passport	P8847122	Nov 26, 2021	Nov 25	12	Valid

1. What needs attention

Employee: Jeffrey Kelly
Document type: Residence permit
Document number: RP-882104
Issue Date: Nov 16, 2021
Expiry Date: Nov 16
Days left: 21
Company: My Company (San Francisco)

Files: Residence-1.pdf (PDF)

Note: Note

2. Alerts before it expires

Document type	Document number	Issue Date	Expiry Date	Days left	Status
Passport	P2280417	Oct 12, 2021	Oct 11	-12	Expired
National ID	ID-7710-3342	Apr 11, 2024	Apr 10, 2029	900	Valid

3. On the employee form

The documents that need attention, a residence permit with its alert, and the Documents tab of an employee.

Tip: Alerts are sent by a daily job as activities for HR and a note on the document. You can also email the employee.

2. What you get

Feature	What it does
Document types	Passport, ID, residence permit, licence, insurance and more, each with a validity period and a reminder period. Add your own.
Each employee's documents	Number, issue and expiry dates and the scanned files, on the employee form and in one list.
Expiry alerts	One alert before a document expires and one when it has expired, to HR, to the employee's manager and, if you wish, to the employee.
Red and orange	Expired documents in red, expiring ones in orange, with filters for the next 30 and 90 days.
Required documents	Mark a type as required and see which employees are missing it.
Renew in one click	The old document is archived and a new one is ready with proposed dates.
Private	HR officers see all documents; an employee sees only their own.
Arabic	Everything is translated and works right to left.

3. Requirements

Item	Details
Odoo	19.0 (Community or Enterprise)
Apps needed	Employees (hr)
License	OPL-1 (Odoo Proprietary License v1.0)

4. Install

- 1 Unzip the package. Inside is `taqnix_employee_documents.zip` ; unzip it to get the folder `taqnix_employee_documents` .
- 2 Copy the folder into one of the `addons_path` folders of your Odoo server and restart Odoo.
- 3 Log in as an administrator, activate **Developer mode**, open **Apps** and press **Update Apps List**.
- 4 Remove the "Apps" filter, search **Employee Documents** and press **Install**.

```
# or from the command line
./odoo-bin -c odoo.conf -d YOUR_DATABASE -i taqnix_employee_documents --stop-after-init
```

5. Document types

In plain words: Open **Employees** → **Configuration** → **Employee** → **Document Types**. Eight common types are installed; change them or add your own.

Employees Documents Departments Learning Reporting Configuration									
New Document Types ⚙		Q Search...		1-8 / 8 < >					
☐	Name	Validity (...)	Remind (...)	Required for ...	Notify	Notify the e...	Notify the e...	Docume...	
☐	Passport	120	90	☒		☒	☐	6	
☐	National ID	60	60	☐		☒	☐	2	
☐	Residence permit	24	60	☒	Mitchell Admin	☒	☐	3	
☐	Work permit / visa	24	60	☐		☒	☐	1	
☐	Driving licence	120	30	☐		☒	☐	2	
☐	Health insurance card	12	30	☐		☒	☒	1	
☐	Professional certificate	36	60	☐		☒	☐	0	
☐	Signed contract	0	0	☐		☒	☐	1	

The document types with their validity, reminder and who is notified.

Field	Meaning
Validity (months)	Proposes the expiry date from the issue date. 0: the document does not expire (a signed contract).
Remind (days before)	The first alert is sent this many days before the expiry. 0: no early alert.
Required for everyone	Employees without a document of this type are listed as missing it.
Notify	Users who receive the alert as an activity. Empty: the HR administrators.
Notify the employee's manager	The manager of the employee, if they have a user, receives the alert.
Notify the employee	The employee receives an email (work contact or user).

6. Add the documents

In plain words: Open an employee and go to the **Documents** tab, or use **Employees → Documents → New**. Choose the type, enter the number, the issue date (the expiry date is proposed) and attach the scans with **Files**.

Employees

Employees

Documents

Departments

Learning

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My Company (San Francisco)

New

Employees

Marc Demo

History

1

Documents

2

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Launch Plan

Jan 1, 2025

+

Send message

Log note

Activity

1

0

Marc Demo

mark.brown23@example

(441)-695-2334

Work Mobile

Employee X

Work

Resume

Certifications

Personal

Payroll

Settings

Documents

1 document(s) expired.

Missing: Residence permit

Document type	Document number	Issue Date	Expiry Date	Days left	Status
Passport	P2290417	Oct 12, 2021	Oct 11	-12	Expired
National ID	ID-7710-3342	Apr 11, 2024	Apr 10, 2029	900	Valid

Add a line

Oct 22, 2026

OdooBot Yesterday at 4:44 PM

Congratulations! May I recommend you to setup an onboarding plan?

OdooBot Yesterday at 4:44 PM

Employee created

The Documents tab: an expired passport, a valid ID and a missing residence permit.

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20

My Company (San Francisco)

New

Employee Documents

Marc Demo - Passport (P2290417)

History

1

Documents

2

1 / 1

Renew

Valid

Expiring soon

Expired

Send message

Log note

Activity

1

1

Employee

Marc Demo

Document type

Passport

Document number

P2290417

Issue Date

Oct 12, 2021

Expiry Date

Oct 11

Days left

-12

Company

My Company (San Francisco)

Files

passport-1.pdf

PDF

Files

Note

Notes

Planned Activities

Today: "Passport of Marc Demo has expired" for Mitchell Admin

✓ Mark Done

✎ Edit

✕ Cancel

Today

OdooBot 12:13 PM

Passport of Marc Demo has expired. Renew it from the document.

OdooBot 12:13 PM

Employee document created

An expired passport: press Renew.

In plain words: The tab shows a red banner for expired documents, an orange one for those expiring soon and a blue one for the required documents the employee does not have.

7. What needs attention

In plain words: **Employees → Documents** opens the documents that are expired or expiring soon. Use the filters *Expired*, *Expiring soon*, *Expires in 30 days* and *Expires in 90 days*, group by employee, type, department or expiry month, and search by number.

Employees

Employees

Documents

Departments

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20

My Company (San Francisco)

New

Employee Documents

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Needs attention

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Search...

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☐ Employee	Document type	Document number	Issue Date	Expiry Date	Days left	Status	
☐ Audrey Peterson	Residence permit	RP-771905	Sep 14, 2021	Sep 13	-40	Expired	
☐ Marc Demo	Passport	P2290417	Oct 12, 2021	Oct 11	-12	Expired	
☐ Tina Williamson	Driving licence	DL-0912-77	Oct 21, 2021	Oct 20	-3	Expired	
☐ Audrey Peterson	Health insurance card	HI-30211	Nov 5, 2021	Nov 4	12	Expiring soon	
☐ Jeffrey Kelly	Residence permit	RP-882104	Nov 14, 2021	Nov 13	21	Expiring soon	
☐ Abigail Peterson	Passport	P8841120	Nov 26, 2021	Nov 25	33	Expiring soon	
☐ Tina Williamson	Work permit / visa	WP-55120	Dec 8, 2021	Dec 7	45	Expiring soon	
☐ Ernest Reed	Passport	P7710284	Jan 17, 2022	Jan 16, 2027	85	Expiring soon	

Expired in red, expiring soon in orange, with the days left.

In plain words: In the employee list, the filters *Has an expired document* and *Missing a required document* find the employees to chase.

8. The alerts

Employees

Employees

Documents

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20

My Company (San Francisco)

New

Employee Documents

Jeffrey Kelly - Residence permit (RP-882104)

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Renew

Valid

Expiring soon

Expired

Send message

Log note

Activity

1

Employee

Jeffrey Kelly

Issue Date

Nov 14, 2021

Document type

Residence permit

Expiry Date

Nov 13

Document number

RP-882104

Days left

21

Company

My Company (San Francisco)

Files

residence-1.pdf

PDF

✓

Files

Note

Notes

Planned Activities

Due in 21 days:

Residence permit of Jeffrey Kelly expires on 2026-11-13" for Mitchell Admin

✓ Mark Done

✎ Edit

✕ Cancel

Today

OdooBot 12:13 PM

Residence permit of Jeffrey Kelly expires on 2026-11-13. Renew it from the document.

OdooBot 12:13 PM

Employee document created

A residence permit expiring in 21 days: an activity for the HR user and a note on the document.

When	What happens
Reminder period reached	Once: an activity to each person to notify, with the expiry date as deadline, and a note on the document.
The document has expired	Once: a new activity due today and a note.
You change the expiry date	The alerts start again for the new date.
Archived documents and employees	No alert.
A type without reminder	No early alert, but the expired alert is still sent.

In plain words: A daily job sends the alerts. If you want the first alert today, run the scheduled action *Employee documents: expiry alerts* from **Settings → Technical → Scheduled Actions**.

9. Renew

In plain words: Open an expired or expiring document and press **Renew**. The old document is archived, its pending activities are removed and a new document opens for the same employee and type with today as the issue date and the expiry date proposed from the validity. Enter the new number and attach the new scans.

10. Who sees what

Who	Can
Employees	Read their own documents only. They cannot change them.
HR officers	See, create and edit the documents of all employees of their companies.
HR administrators	Also manage the document types.

Tip: The scanned files belong to the document: whoever may read it may read them.

11. Arabic and right to left

My Company (San Francisco)		Configuration		Reporting	Learning	Departments	Documents	Employees	Employees
8 / 1-8		Needs attention		Employee Documents					
Status	Days left	Expiry Date	Issue Date	Document number	Document type	Employee			
Expired	-40	١٣ سبتمبر ٢٠٢١	١٤ سبتمبر ٢٠٢١	RP-771905	Residence permit	Audrey Peterson			
Expired	-12	١١ اكتوبر ٢٠٢١	١٢ اكتوبر ٢٠٢١	P2290417	Passport	Marc Demo			
Expired	-3	٢٠ اكتوبر ٢٠٢١	٢١ اكتوبر ٢٠٢١	DL-0912-77	Driving licence	Tina Williamson			
Expiring soon	12	٤ نوفمبر ٢٠٢١	٥ نوفمبر ٢٠٢١	HI-30211	Health insurance card	Audrey Peterson			
Expiring soon	21	١٣ نوفمبر ٢٠٢١	١٤ نوفمبر ٢٠٢١	RP-882104	Residence permit	Jeffrey Kelly			
Expiring soon	33	٢٥ نوفمبر ٢٠٢١	٢٦ نوفمبر ٢٠٢١	P8841120	Passport	Abigail Peterson			
Expiring soon	45	٧ ديسمبر ٢٠٢١	٨ ديسمبر ٢٠٢١	WP-55120	Work permit / visa	Tina Williamson			
Expiring soon	85	١٦ يناير ٢٠٢٢	١٧ يناير ٢٠٢٢	P7710284	Passport	Ernest Reed			

The documents in an Arabic interface.

12. Limits

Limit	Detail
No OCR	Dates are entered by you; nothing is read from the scans.
One alert per stage	A reminder and an expiry alert per document and date. Change the date to re-arm.
Employee email	Needs a work contact or a user with an email, and working outgoing mail.
Required types	A type is required for everyone; it cannot be limited to a department.
Missing means none	An expired document counts as present; it is alerted, not missing.

13. For developers

In plain words: Skip this chapter if you only use the module.

Item	Details
Models	<code>taqnix.employee.doc.type</code> and <code>taqnix.employee.document</code> (with chatter and activities).
Status	<code>state</code> (valid, expiring, expired) and <code>days_left</code> are computed and searchable.
Job	<code>_cron_expiry_alerts</code> , daily.
Employee	<code>tx_document_ids</code> , <code>tx_expired_count</code> , <code>tx_missing_type_ids</code> .

```
doc = env['taqnix.employee.document'].create({
    'employee_id': employee.id,
    'type_id': env.ref('taqnix_employee_documents.doc_type_passport').id,
    'number': 'P4412987', 'expiry_date': '2027-05-30',
})
env['taqnix.employee.document'].search([('state', '=', 'expiring')])
```

14. Troubleshooting

Problem	What to do
No alert was sent	Check the dates (the reminder days of the type), that the document and employee are not archived, and that the daily job is active.
The manager gets nothing	The manager must have a user. Or add users in Notify on the type.
I cannot see the Documents menu	You need the HR Officer right. Employees see their documents from their own employee form.
The expiry date is empty	The type has validity 0 or no issue date was entered. Enter the date by hand.
I want to change a document type's name	Edit it; the existing documents follow.

15. Updating and removing

Replace the folder with the new version, restart Odoo and run `-u taqnix_employee_documents` . Types and documents are kept. Removing the module deletes the documents; the scanned files are deleted with them.

16. Support

Installation help and bug fixes are included for 6 months, with lifetime updates. Contact us through the marketplace page where you bought the module or write to **support@taqnix.com** with your Odoo version and a screenshot.

Changelog

1.0.0 – Initial release

- Document types with validity and reminder periods; eight common types installed
- Employee documents with number, dates and scanned files, on the employee form and in one list
- Daily expiry alerts as activities and notes, to HR, the manager and optionally the employee
- Expired and expiring documents highlighted, with filters; missing required documents
- Renew in one click
- Private to HR officers and the employee; multi-company
- Arabic translation, automated tests

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