

Onboarding

A guide to employee onboarding and offboarding: templates, starting a process, the tasks and activities, finishing, reminders and the access rights.

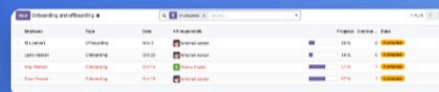
1. Start here

In plain words: A new colleague arrives and nobody has prepared the laptop. Another leaves and the access card is never returned. **Employee Onboarding & Offboarding** turns these moments into a **checklist from a template**: each task has an owner (the employee, the manager, HR or a named person such as IT), a due date counted from the first or last day, and appears in the owner's activities. A progress bar shows where you are, and the process finishes by itself when the required tasks are done.



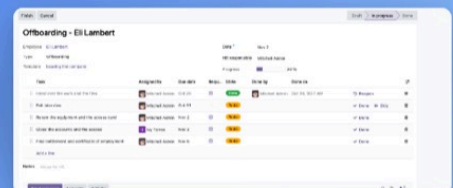
Task	Assignee	Start Date	Due Date	Progress	Status
1. Sign the employment contract	Omar Farouk	2023-01-01	2023-01-01	100%	Done
2. Prepare the workstation and the equipment	IT	2023-01-01	2023-01-01	100%	Done
3. Check the employee's ID card	HR	2023-01-01	2023-01-01	100%	Done
4. Welcome the new employee	HR	2023-01-01	2023-01-01	100%	Done
5. Assign the employee to a team	Manager	2023-01-01	2023-01-01	100%	Done
6. Assign the employee to a project	Manager	2023-01-01	2023-01-01	100%	Done
7. Assign the employee to a task	Manager	2023-01-01	2023-01-01	100%	Done
8. Assign the employee to a role	Manager	2023-01-01	2023-01-01	100%	Done

Every task has an owner and a date



Task	Assignee	Status	Progress
1. Sign the employment contract	Omar Farouk	Done	100%
2. Prepare the workstation and the equipment	IT	Done	100%
3. Check the employee's ID card	HR	Done	100%
4. Welcome the new employee	HR	Done	100%
5. Assign the employee to a team	Manager	Done	100%
6. Assign the employee to a project	Manager	Done	100%
7. Assign the employee to a task	Manager	Done	100%
8. Assign the employee to a role	Manager	Done	100%

Who is where



Task	Assignee	Start Date	Due Date	Progress	Status
1. Sign the employment contract	Eli Lambert	2023-01-01	2023-01-01	100%	Done
2. Prepare the workstation and the equipment	IT	2023-01-01	2023-01-01	100%	Done
3. Check the employee's ID card	HR	2023-01-01	2023-01-01	100%	Done
4. Welcome the new employee	HR	2023-01-01	2023-01-01	100%	Done
5. Assign the employee to a team	Manager	2023-01-01	2023-01-01	100%	Done
6. Assign the employee to a project	Manager	2023-01-01	2023-01-01	100%	Done
7. Assign the employee to a task	Manager	2023-01-01	2023-01-01	100%	Done
8. Assign the employee to a role	Manager	2023-01-01	2023-01-01	100%	Done

And a proper goodbye

The processes in progress, a new employee's checklist and a leaver's checklist.

Tip: Two ready templates come with the module: **New employee** and **Leaving the company**. Change them or make your own.

2. What you get

Feature	What it does
Templates	Onboarding or offboarding checklists: the tasks, who does each one, the days from the first (or last) day, and whether the task is required.
Owners	The employee, the employee's manager, the HR responsible of the process, or a named person (IT, finance...).
Due dates	Counted from the start date of the process: use negative days to do something before the date (the contract two days before, the handover a week before the last day).
Activities	Each task is scheduled as an activity for its owner, so it appears in the Odoo activity menu and is marked done with the task.
Progress	A progress bar and counters on the process; tasks overdue in red.
Required tasks	The process finishes by itself when the required tasks are done; optional ones still open are skipped.
My tasks	A list of the tasks assigned to you, with a Done button.
Reminders	A daily action posts a reminder on the processes with overdue tasks and notifies the owner and HR.
Employee form	A button on the employee shows all the processes of the employee.
Arabic	Everything is translated, templates included, and works right to left.

3. Requirements

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

4. Install

- 1 Unzip the package. Inside is `taqnix_employee_onboarding.zip` ; unzip it to get the folder `taqnix_employee_onboarding` .
- 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 Onboarding & Offboarding** and press **Install**.

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

5. The templates

In plain words: Employees → Onboarding → Templates (HR). Open **New employee** or **Leaving the company**, or create your own. For each task choose who does it:

6. Start a process

In plain words: Employees → Onboarding → Processes → New, or the **Onboarding** button on the employee. Choose the employee, the template, the date (the first day for an onboarding, the last day for an offboarding) and the HR responsible, then press **Start**. The tasks are created, assigned and scheduled as activities.

Employees Employees Departments Onboarding Learning Reporting Configuration 25 36 My Company									
New Onboarding and offboarding		In progress Search...			1-4 / 4				
Employee	Type	Date	HR responsible		Progress	Overdue...	State		
☐ Eli Lambert	Offboarding	Nov 2	Mitchell Admin		20 %	0	In progress		
☐ Layla Hassan	Onboarding	Oct 28	Mitchell Admin		14 %	0	In progress		
☐ Amy Watson	Onboarding	Oct 18	Salma Khalid		57 %	1	In progress		
☐ Omar Farouk	Onboarding	Oct 18	Mitchell Admin		57 %	1	In progress		

The processes: progress, overdue tasks and status.

Employees

Directory

Onboarding

4

My Company

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Onboarding tasks

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My tasks

X

T

To do

X

Search...

1-3 / 3

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☐ Due date	Task	Process	Assigned to	State	
☐ Oct 25	Prepare the workstation and the equipment	Onboarding - Layla Hassan	I Ivy Torres	To do	✓ Done
☐ Oct 27	Create the accounts (email, applications)	Onboarding - Layla Hassan	I Ivy Torres	To do	✓ Done
☐ Nov 2	Close the accounts and the access	Offboarding - Eli Lambert	I Ivy Torres	To do	✓ Done

The tasks of one person.

8. Offboarding

In plain words: The same, for somebody who leaves: the date is the **last day**, and the template **Leaving the company** has the handover, the exit interview, the return of the equipment, the closing of the accounts and the final settlement.

A leaver's checklist.

In plain words: When the last **required** task is done, the process becomes **Done** by itself and the optional tasks left open are skipped. You can also press **Finish** when no required task is left. A daily scheduled action (**Onboarding: remind the overdue tasks**) posts a reminder on each process with an overdue task, once per task, and notifies the owner and HR. The **Onboarding** button of the employee form lists the employee's processes.

The screenshot shows the Odoo HR Onboarding form for an employee named Omar Farouk. The form is divided into several sections: Work, Location, and Usual Work Location. The Work section includes fields for Company, Department, Job Position, Job Title, and Manager. The Location section includes fields for Work Address and Work Location. The Usual Work Location section includes a field for the day of the week. The Organization Chart shows the hierarchy, with Mitchell Admin as the manager of Omar Farouk. The Onboarding button is highlighted in the top navigation bar.

The Onboarding button on the employee form.

10. Who can do what

Who	Can
HR officers	Make templates, start and manage processes, mark any task done, reopen and skip.
Everybody else	See and do the tasks assigned to them, see the process of their own onboarding, open the processes where they have a task.
Employees without a task	See nothing of other people's processes.

11. Arabic and right to left

My Company
1
4
Configuration
Reporting
Learning
استقبال الموظف
Departments
Employees
إلهاء
جديد

استقبال الموظفين وإنهاء خدمتهم
 استقبال الموظف - Amy Watson

إنهاء إلهاء

استقبال الموظف - Amy Watson

التاريخ ? ١٨ أكتوبر

مسؤول الموارد البشرية Salma Khalid

% 57 التقدم

المهمة	مسئلة إلى	تاريخ الاستحقاق	مطلوب	الحالة	نقطة	أنجزت في	
ترقية عقد العمل	Salma Khalid S	١٦ أكتوبر	☒	تم	S	Salma Khalid	🗑️ إعادة فتح
تهيئة مكان العمل والمعدات	Ivy Torres I	١٥ أكتوبر	☒	تم	S	Salma Khalid	🗑️ إعادة فتح
إنشاء الحسابات (البريد والتطبيقات)	Ivy Torres I	١٧ أكتوبر	☒	تم	S	Salma Khalid	🗑️ إعادة فتح
اجتماع ترحيبي مع المدير	Salma Khalid S	١٨ أكتوبر	☒	تم	S	Salma Khalid	🗑️ إعادة فتح
قراءة سياسات الشركة ودليل الموظف	Salma Khalid S	٢١ أكتوبر	☒	متسبب			✅ تم
الاتفاق على أهداف أول 90 يومًا	Salma Khalid S	٢٥ أكتوبر	☒	متسبب			✅ تم
متابعة نهاية الشهر الأول	Salma Khalid S	١٧ نوفمبر	☐	متسبب			✅ تم ➔ تحقق

إضافة بند

ملحظت للموارد البشرية

إرسال رسالة ملحظة النشاط

الأنشطة المخطط لها

- 3 أيام التأخير: "قراءة سياسات الشركة ودليل الموظف" لـ Salma Khalid

 📝 التعيين كمتكامل ✍️ تحرير 🗑️ إلغاء
- غذا: "الاتفاق على أهداف أول 90 يومًا" لـ Salma Khalid

 📝 التعيين كمتكامل ✍️ تحرير 🗑️ إلغاء

A process in an Arabic interface, with the template in Arabic.

12. Limits

Limit	Detail
No signatures or documents	The module is a checklist: it does not collect signatures or files (use the attachments of the process).
Tasks are copies	Changing a template does not change the processes already started.
Activities	An owner without an Odoo user cannot receive an activity: the HR responsible gets the task.
Emails	Reminders are sent by Odoo's mail system, so outgoing mail must be configured.

13. For developers

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

```
template = env.ref('taqnix_employee_onboarding.template_onboarding')
process = env['taqnix.onboarding'].create({'employee_id': employee.id, 'template_id': tem
process.action_start()           # creates the tasks and schedules the activities
process.task_ids.filtered(lambda t: t.name.startswith('Welcome')).action_done()
process.progress, process.overdue_count, process.state
```

14. Troubleshooting

Problem	What to do
Choose a template or add at least one task	The process has no tasks: pick a template or add tasks by hand.
A task has no owner	The employee has no manager or user: the HR responsible gets it; give the employee a user or a manager.
I cannot see Onboarding	The Onboarding menu is under Employees; the Processes and Templates entries are for HR officers.
A task cannot be skipped	It is required: untick Required or do it.

15. Updating and removing

Replace the folder with the new version, restart Odoo and run `-u taqnix_employee_onboarding`.
The processes and the templates are kept.

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

- Onboarding and offboarding templates with tasks, owners, days from the date and required flag; two templates included

- Processes per employee: tasks created, assigned and scheduled as activities
- Progress, overdue tasks, done by and on
- Finishes by itself when the required tasks are done
- My tasks list, daily reminders of overdue tasks, button on the employee form
- Arabic translation, automated tests