

DSL Instant Leave or Late Entry

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User Manual & Configuration Guide

This document provides complete guidance on configuring, accessing, and using the Instant Leave or Late Entry module within Odoo. It covers role-based access setup, the unified dashboard navigation bar, issue management, working-time and sandwich-rule configuration, automated reporting, the exact field definitions behind every export, known business rules, and administrator configuration.

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★ Document Coverage

Overview • Access Rights & Roles • Unified Navigation (incl. History) • User / Admin / Management Dashboards • Configuration Modules incl. Working Times • Automated Email Reports • Report Field Reference • Business Rules & Known Platform Behavior • Troubleshooting • Glossary

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1. Overview

Instant Leave or Late Entry, still referred to internally and in some menus as the Employee Activity Dashboard, is a real-time monitoring module built for Odoo. It gives HR teams and management a unified view of employee attendance, leave status, and activity issues, all in one place. The module enforces strict role-based access control so that each user sees exactly the data relevant to their role, nothing more.

1.1 Key Capabilities

- Real-time KPI cards — On Leave, Absent, Late Coming, Issues, Attendance Compliance
- Searchable filters by Employee, Department, Work Location, and Period
- One-click Excel (XLSX) exports — Leave, Absent, Issue, and Full Reports, with a documented field reference (Section 5.6)
- Automated periodic email reports via a background Cron job
- Issue submission and approval workflow — Draft → Submitted → Approved / Rejected
- Multi-company and multi-department data segregation built in, with all permitted companies pre-selected at login
- Interactive Chart.js visualizations on the Management Dashboard
- New in v2.0: configurable Late Check-in Buffer and Sandwich Rule per working schedule
- New in v2.0: a unified top navigation bar with a dedicated History tab

1.2 Roles & Permissions Matrix

Role	Who it's for	What they can do
User (Employee)	Standard employees	View personal dashboard, submit Leave and Issue requests for themselves only
Manager	Department / company managers	Monitor their team, approve/reject issues, export reports for their scope
Configuration Manager (new in v2.0)	Power users who maintain configuration without full HR authority	Manage Issue Types, Approval Sets, Email Reports, Scheduled Actions, and Working Times
Super Manager	HR administrators / top management	Full access + configuration + Management Dashboard, across all companies they are assigned to

2. Configuration & Access Rights

Before any employee can use the dashboard, an administrator must configure their Odoo user profile with the correct permissions. This section covers every step, including the v2.0 access-rights layout.

⚠ Important

All access changes require a Save. Ask the user to log out and back in for new permissions to take effect.

2.1 Step 1 — Open the User Profile

1. Log in to Odoo as an administrator.
2. Go to Settings → Users & Companies → Users.
3. Search for and open the employee's user record.
4. Click the Access Rights tab.

2.2 Step 2 — Configure Multi-Department Access

If the user needs to see data from departments other than their own — typically managers — configure the Multi Department section first.

The screenshot shows the 'Email Reports / New' form. At the top, there are buttons for 'Save' and 'Discard'. Below them are 'Activate for everyone' and 'Send Now' buttons. The main section is titled 'Daily Employee Activity Report'. It includes a 'Periodicity' section with radio buttons for 'Daily' (selected), 'Weekly', and 'Monthly'. Below this is a 'Next Send Date' field showing '24/05/2026'. A 'Company' dropdown menu is highlighted with a red box. To the right, the 'Reports to Include' section lists 'Leave Report', 'Absent Report', 'Issue Report', and 'Full Report', each with a checked checkbox. At the bottom, there is a 'Recipients' table with columns for 'Name' and 'Email', and an 'Add a line' button. The table is also highlighted with a red box.

Figure 1 — Multi Department section on a user's Access Rights profile

In the Multi Department section, click the Allowed Departments dropdown and select every department this user should monitor. Leave it empty for standard employees who only need their own data.

✓ Tip

The employee record must belong to the same company context as the departments selected here. Mismatched company/department settings are the most common cause of missing records.

2.3 Step 3 — Assign the Instant Leave or Late Entry Role

In v2.0 the role checkboxes have moved. Scroll to the Attendances section of the same profile and open the Instant Leave or Late Entry group (previously labelled Activity Dashboard).

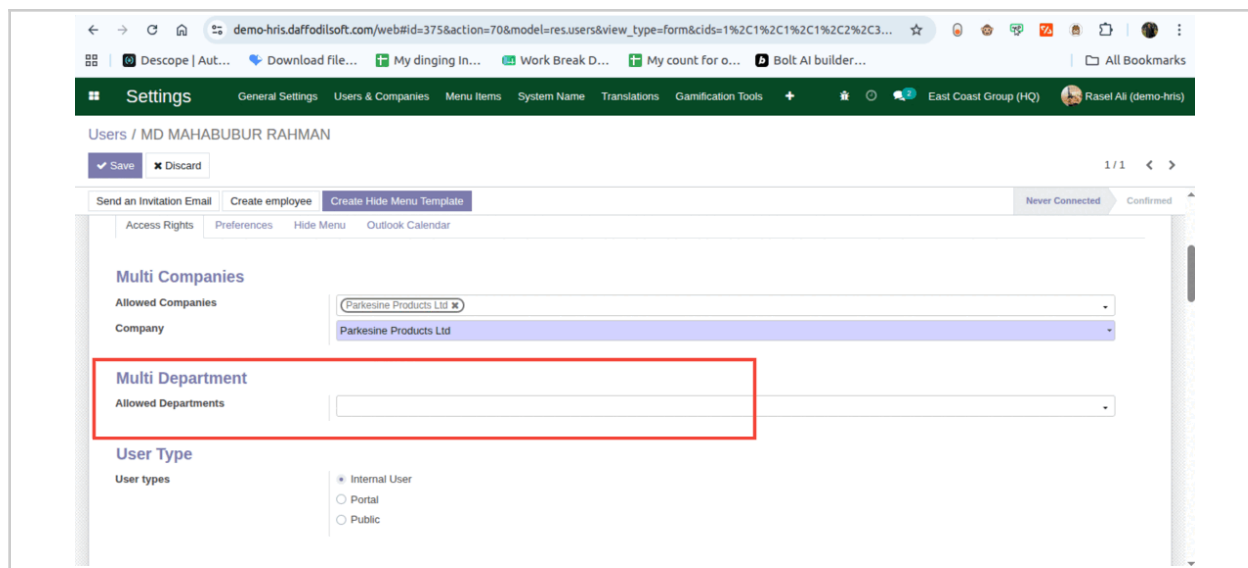


Figure 2 — Instant Leave or Late Entry role checkboxes under Attendances, including the new Configuration Manager option

Checkbox	When to check it
User	Standard employees — personal dashboard and issue submission only.
Manager	Team leads / department managers who need to view and approve team data.
Configuration Manager (new in v2.0)	Users who should maintain Issue Types, Approval Sets, Email Reports, Scheduled Actions, and Working Times, without needing full Super Manager rights.
Super Manager	HR admins and top management — full access including all configuration menus.
Multi Department	Check alongside Manager, Configuration Manager, or Super Manager when Allowed Departments are set above.

5. After checking the correct box, click Save.

⚠ Important — Configuration visibility

The Configuration menu must be visible only to Configuration Manager and Super Manager. Plain Manager and Super Manager-without-configuration users should not see Configuration options — double-check this after assigning roles.

3. The Unified Navigation Bar (New in v2.0)

Rather than opening a role-locked page directly, v2.0 presents one shared top navigation bar. The tabs a user can see still depend on their role, but everyone who has access lands on the same bar: User Dashboard, Admin Dashboard, Management Dashboard, History, and Configuration.

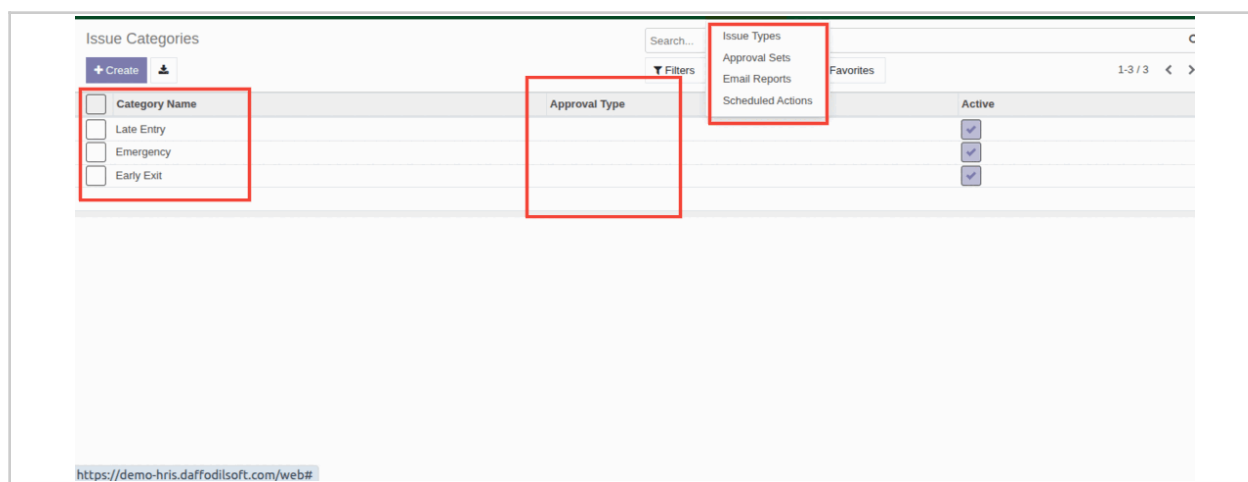


Figure 3 — Unified top navigation bar with the Configuration dropdown open

Tab	Visible to	Purpose
User Dashboard	All roles	The employee's own personal dashboard (see Section 4).
Admin Dashboard	Manager, Configuration Manager, Super Manager	The team-level dashboard formerly called the Manager Dashboard (see Section 5).
Management Dashboard	Super Manager	The executive-level dashboard (see Section 6).
History (new)	All roles, scoped to what each role is allowed to see	A dedicated list of all past activity records, independent of the Recent Issues panel.
Configuration	Configuration Manager, Super Manager	Issue Types, Approval Sets, Email Reports, Scheduled Actions, and Working Times (see Section 7).

3.1 History Tab

The History tab opens a full, filterable list of every activity record the current user is permitted to see — the same underlying data as the Recent Issues panel and the All Activity Records table, but without a row limit. Use it when you need to look further back than the default period filter allows, or to search for a specific past issue.

4. User Dashboard — User Role

Employees assigned the User role land on the User Dashboard tab. It shows today's date, the employee's name and designation, two action buttons, and a Recent Issues panel — unchanged in behaviour from v1.0, now reachable from the shared navigation bar.

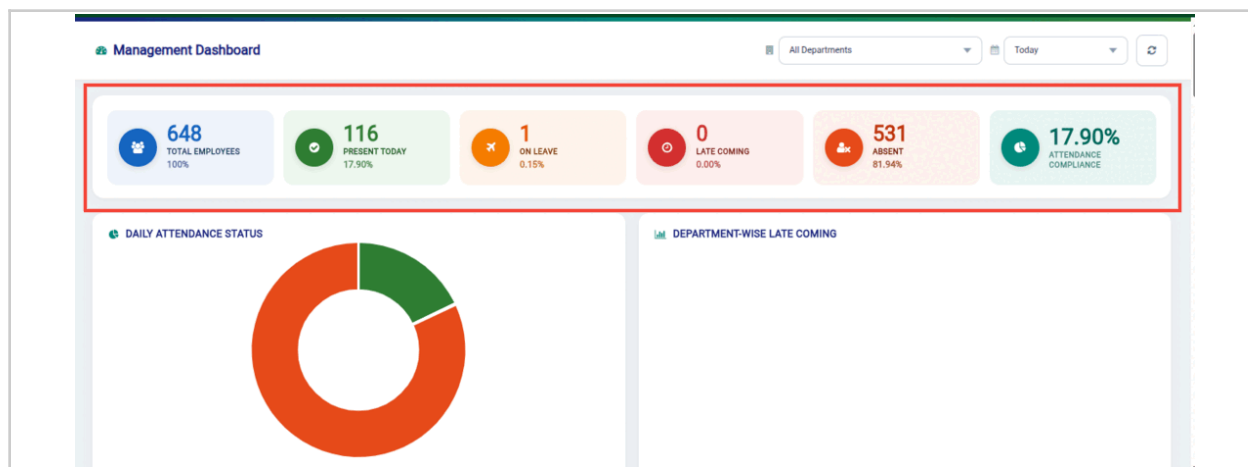


Figure 4 — User Dashboard: Leave and Add Issue buttons, profile info, and Recent Issues panel

4.1 Action Buttons — Leave & Add Issue

Leave

Opens the standard Odoo time-off request form. The employee selects the leave type, sets start and end dates, adds a reason, and submits. The request follows the standard Odoo leave approval flow. As of v2.0, the Description field is mandatory for every leave request (see Section 9.3).

Add Issue

Opens the issue submission form. The employee selects an Issue Type (e.g., Early Exit, Late Entry, Emergency), writes a short description, and submits. Issues are always linked to the logged-in employee — users cannot submit on behalf of anyone else.

4.2 Refresh Button

The circular arrow icon at the top-right of the screen refreshes dashboard data without reloading the whole page. Use it after submitting an issue to immediately see the updated Recent Issues list.

4.3 Recent Issues Panel

Shows the most recent issues submitted by the employee, with Issue Type, description, current status, and date. Click Show All to open the complete history — this now opens the History tab described in Section 3.1.

4.4 Issue Status Workflow

Status	Meaning
Draft	Saved but not yet submitted for review — equivalent to pressing Save rather than Request Submit (see Section 9.3).
Requested / Submitted	Awaiting manager review.
Approved	Manager has reviewed and approved the issue.
Rejected	Manager has reviewed and rejected the issue.

✓ Tip

If a submission is Rejected, managers can reset it to Draft so the employee can edit and resubmit.

5. Admin Dashboard — Manager / Configuration Manager Role

Users assigned the Manager or Configuration Manager role see the Admin Dashboard tab (the same screen documented as the Manager Dashboard in v1.0) — a comprehensive view of all employees they are permitted to monitor, with filter controls, KPI cards, and a detailed records table.

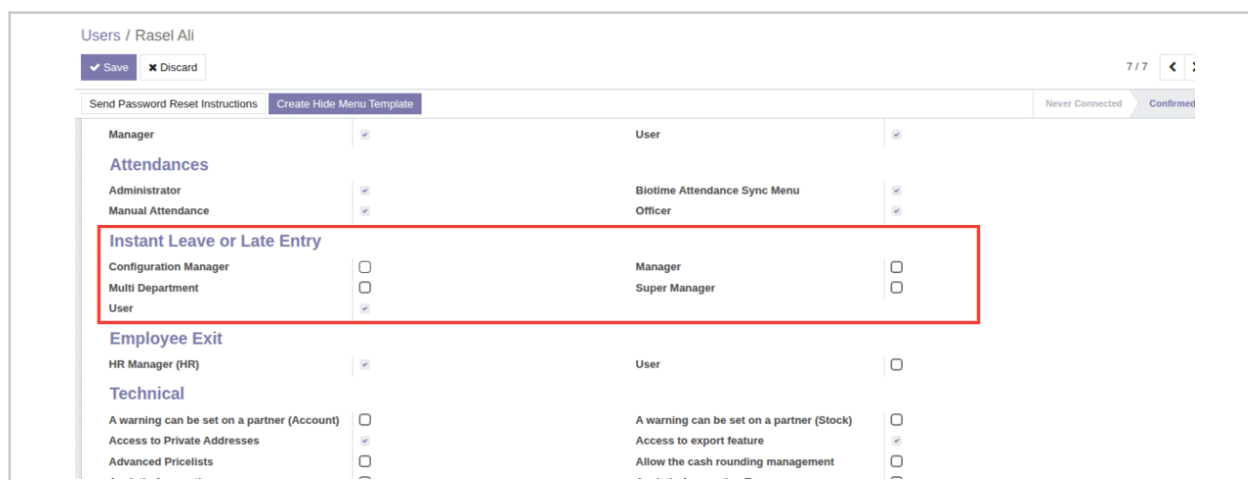


Figure 5 — Admin Dashboard: filter bar, KPI cards, Export dropdown, and All Activity Records table

5.1 Filter Bar

Use the four dropdowns at the top to narrow the data shown across all KPI cards and the records table at once.

Filter	What it does
Employee	Scope everything to a single employee.
Department	Show only employees from one department.
Work Location	Filter by physical site (Headoffice, Factory, Remote, etc.). This should match the Attendance Location used in the Attendance module (see Section 9.2).
Period	Choose Today, This Week, This Month, or a custom date range.

All filters stack together. For example: Department = Production + Period = This Week shows only Production staff activity for the current week.

5.2 KPI Cards

Three colour-coded cards give an instant summary. Each card is clickable and opens a filtered Odoo list view of the underlying records for deeper inspection.

Card	What it counts	Click action
On Leave	Employees with approved leave today	Opens the leave records list
Absent	No check-in and no approved leave	Opens the absent employees list
Issues	Total open activity issues in the period	Opens the issue management list

5.3 All Activity Records Table

Lists every activity record matching the active filters: Employee ID, Employee, Subsidiary, Department, Designation, Work Location, Date, Check-In Time, Check-Out Time, Details, Description, and a colour-coded Status badge (e.g., Early Exit, Late Entry and Early Exit).

Click View All [N] records (top-right of the table) to open the full list in a standard Odoo view for bulk actions.

5.4 Approving & Rejecting Issues

Click the Issues KPI card to open the issues list. Open an individual issue record to see full details, then click Approve or Reject. Managers can also click Reset to Draft to send a rejected issue back to the employee for editing. Multi-level approval chains follow the strict ordering rules in Section 9.4.

5.5 Exporting Data to Excel

Click the green Export button (top-right of the dashboard) to reveal four export options: Leave Report, Absent Report, Issue Report, and Full Report.

Export	Contents	Best used for
Leave Report	All leave records (pending, approved, refused)	Leave compliance audits
Absent Report	Absent employee list by department	Daily HR follow-up
Issue Report	All activity issues in the period	Issue tracking & resolution
Full Report	Attendance + leave + issue combined	Executive / weekly summary

✓ Tip

Apply your filters before clicking Export. The file will contain exactly the data visible on screen.

5.6 Report Field Reference (New in v2.0)

Each export follows a fixed header-to-source mapping so that recipients outside the system can interpret the columns without guessing. These definitions are drawn directly from the ECG rollout requirements log and apply to both the on-screen tables and the exported Excel files.

Full Activity Records

Header	Source / Meaning
SL	Serial number.
Employee ID	ID number of the employee.
Employee	Employee name.
Subsidiary	Company name.

Header	Source / Meaning
Department / Designation	As set on the employee record.
Work Location	Attendance location.
Date	For Leave: date of application. For Absent: date of absence. For Issue: date the issue occurred.
Check In Time / Check Out Time	Format hh:mm AM/PM.
Details	For Leave: leave From–To range. For Absent: "No attendance record". For Issue: type of issue. For uninformed late/exit: "Late by X min and Left Y min early".
Description	For Leave: type of leave. For Absent: "Absent". For Issue: why/what the issue was.
Status	Submitted / Approved / Early / Late / Absent / Late Entry and Early Exit. Refused applications should never appear in this report.

Leave Records

Header	Source / Meaning
SL / Employee ID / Employee Name / Designation / Department / Subsidiary / Work Location	Same as Full Activity Records.
Leave Type	Only the plain type — Annual Leave, Casual Leave, or Sick Leave — never a company-qualified variant such as "Annual Leave (ECDL)-2026".
Applied Date	Leave application submission date.
Duration	Leave start date → leave end date.
Number of Days	Total days applied for.
Status	Requested / Approved only. Refused applications should never appear in this report.

Absent Records

Header	Source / Meaning
SL / Employee ID / Employee / Designation / Department / Subsidiary / Work Location	Same as Full Activity Records.
Date	Date of absence.
Weekday	Day of the week the absence fell on.

Issue Records

Header	Source / Meaning
SL / Employee ID / Employee Name / Designation / Department / Subsidiary / Work Location	Same as Full Activity Records.
Issue Type	Type of issue (Late Entry, Early Exit, Emergency).
Date	Date the issue occurred.
Weekday	Day of the week.
Check In Time / Check Out Time	Format hh:mm AM/PM.
Description	Free-text description of the issue as entered by the employee.

6. Management Dashboard — Super Manager Role

Super Managers access an additional executive-level Management Dashboard tab showing organisation-wide KPIs, real-time charts, leave analytics, issue analysis, and a department-wise attendance breakdown.

6.1 Global KPI Cards

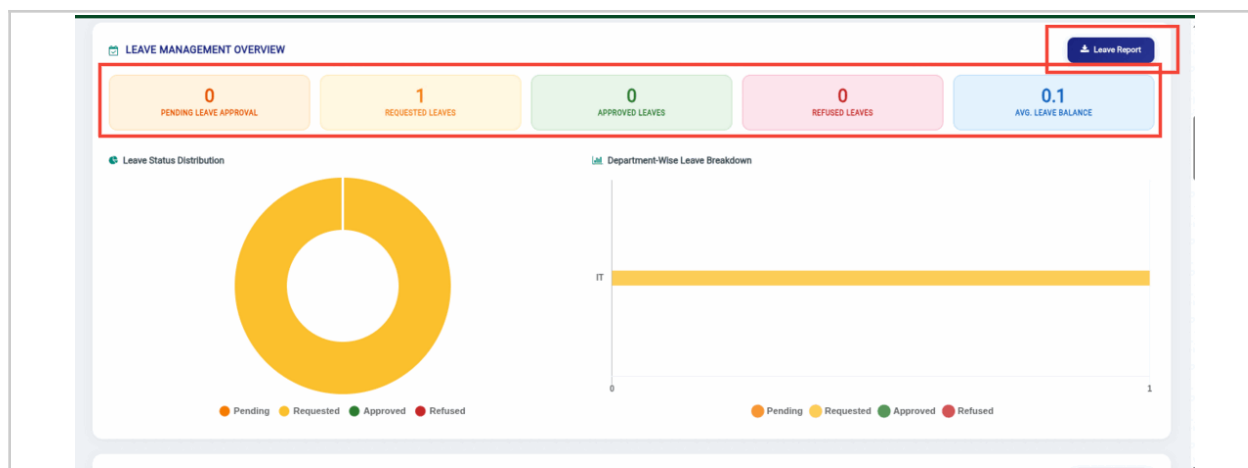


Figure 6 — Management Dashboard KPI cards: Total Employees, Present Today, On Leave, Late Coming, Absent, Attendance Compliance %

KPI	Description
Total Employees	Complete headcount for the active company.
Present Today	Count and % of employees who have checked in.
On Leave	Employees with approved leave covering today.
Late Coming	Employees who checked in after their scheduled start time, adjusted for the Late Check-in Buffer (Section 7.4).
Absent	No check-in and no approved leave — the main operational risk indicator.
Attendance Compliance %	$\text{Present} \div (\text{Total} - \text{On Leave}) \times 100$.

6.2 Leave Management Overview

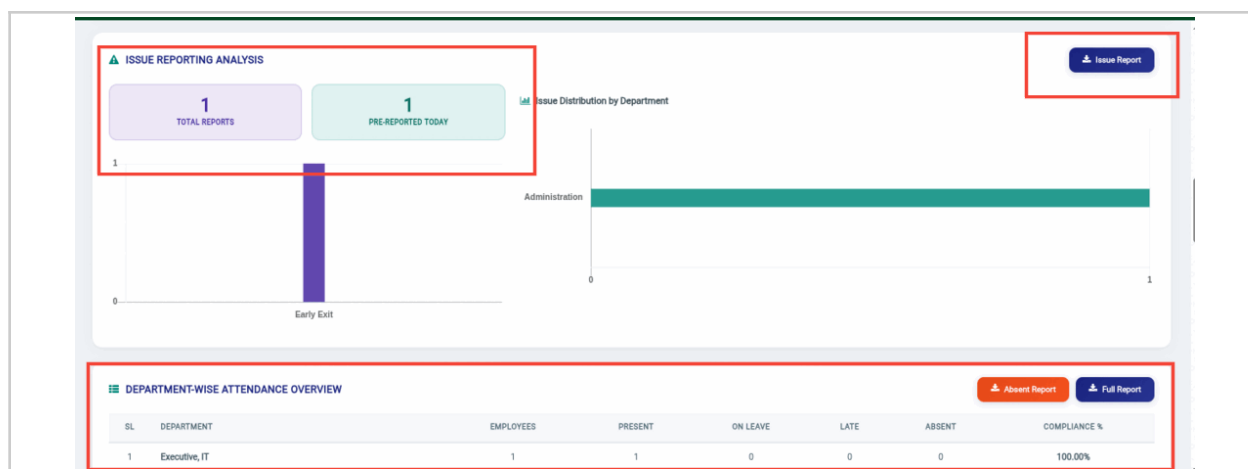


Figure 7 — Leave Management Overview: KPI cards, Status Distribution donut, Department-Wise Breakdown bar chart

- Pending Leave Approval — Submitted but not yet reviewed.
- Requested Leaves — Currently in Requested state.
- Approved Leaves — Confirmed leaves.
- Refused Leaves — Declined leaves.
- Avg. Leave Balance — Average remaining entitlement across all employees.

Click Leave Report (top-right of this section) to export the filtered leave data to Excel.

6.3 Issue Reporting Analysis & Department-Wise Attendance

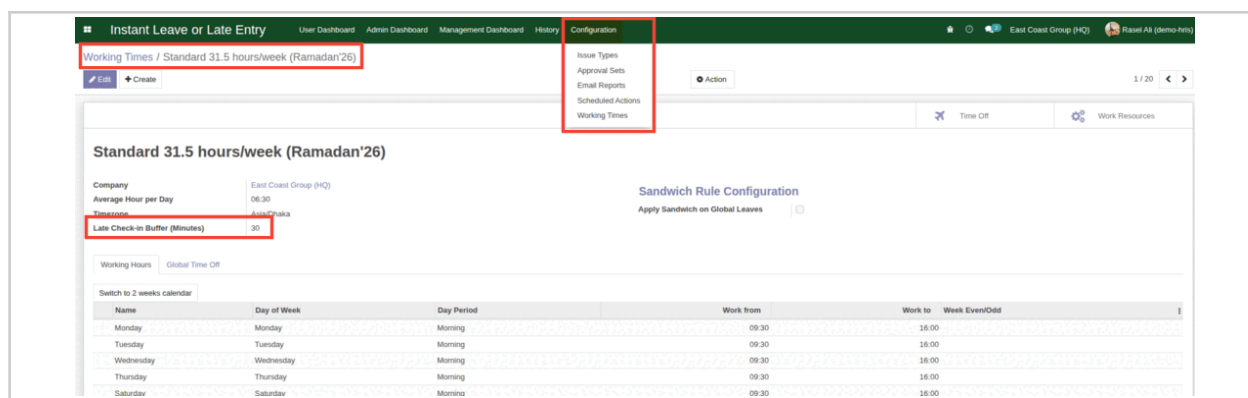


Figure 8 — Issue Reporting Analysis charts and Department-Wise Attendance Overview table with export buttons

Issue Reporting Analysis

- Total Reports — All issues submitted in the selected period.
- Pre-Reported Today — Issues logged before the employee's scheduled check-in (proactive reporting).

The Issue Distribution by Department bar chart shows which departments raise the most issues.

Department-Wise Attendance Overview

Column	What it shows
Department	Department name.
Employees	Total headcount.
Present	Checked in today.
On Leave	On approved leave.
Late	Checked in after scheduled start.
Absent	No check-in, no leave.
Compliance %	Department-level attendance compliance percentage.

7. Configuration Modules (Configuration Manager / Super Manager)

In v2.0, both Configuration Managers and Super Managers can reach the Configuration sub-menu from the shared navigation bar. It now contains Issue Types, Approval Sets, Email Reports, Scheduled Actions, and the new Working Times screen. Configuration must remain hidden from plain Manager accounts (see Section 9.2).

7.1 Issue Categories

Defines the high-level types of issues employees can log. Three categories ship by default:

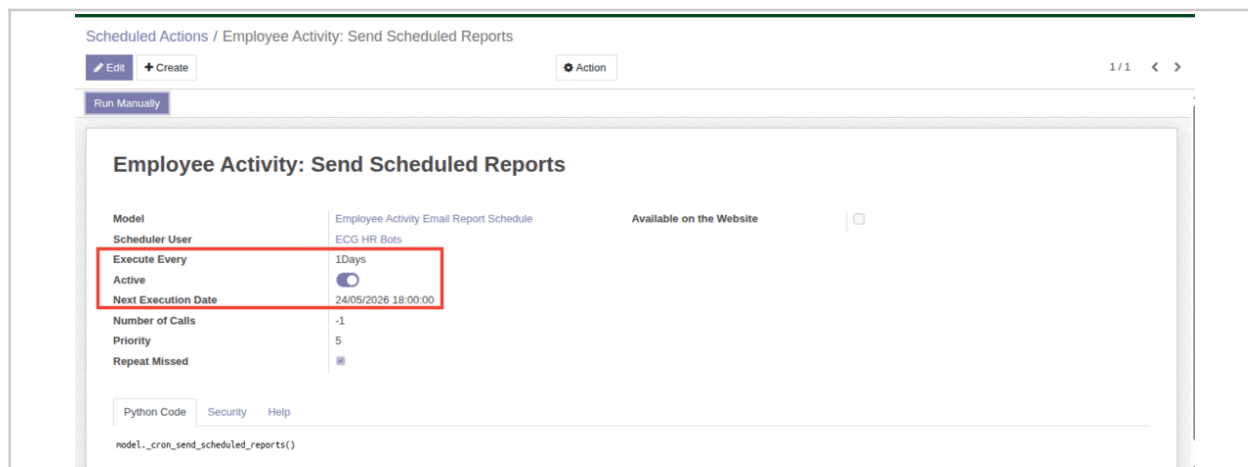


Figure 9 — Issue Categories list with the Configuration dropdown (Issue Types, Approval Sets, Email Reports, Scheduled Actions)

- Late Entry — Arrived after the scheduled start time.
- Emergency — An unplanned event requiring absence or early departure.
- Early Exit — Left before the scheduled end of the workday.

Click + Create to add a new category. Each category can be linked to an Approval Type to define its review workflow.

7.2 Issue Types

Sub-classifications within a category for more granular reporting. Navigate to Configuration → Issue Types to manage these.

7.3 Approval Sets

Defines multi-level approval workflows (e.g., direct manager then HR representative). Navigate to Configuration → Approval Sets to create or edit these. See Section 9.4 for the rules governing approval order and visibility.

7.4 Working Times (New in v2.0)

Working Times define each schedule's expected hours, the grace period for late check-ins, and whether the sandwich rule applies to leave taken around a global holiday. Navigate to Configuration → Working Times.

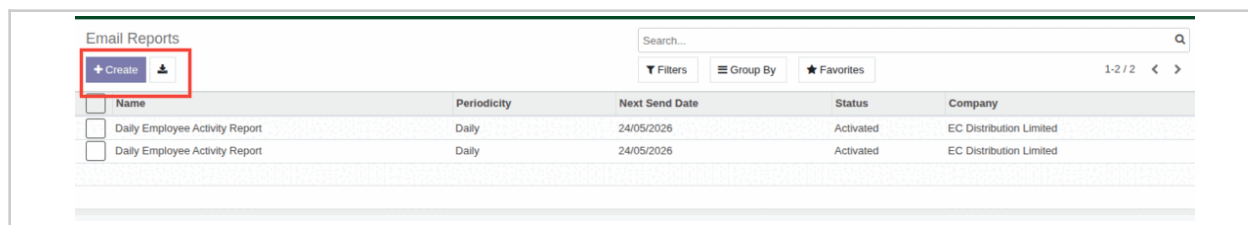


Figure 10 — Working Times record: Late Check-in Buffer and Sandwich Rule Configuration

Field	What it controls
Company	The company this working schedule applies to.
Average Hour per Day	The expected daily working hours used for compliance calculations.
Timezone	The timezone the Working Hours grid below is interpreted in.
Late Check-in Buffer (Minutes)	A grace period, in minutes, before a check-in is flagged as Late Coming. For example, a 30-minute buffer on a 09:30 start means employees checking in by 10:00 are not marked late.
Sandwich Rule Configuration — Apply Sandwich on Global Leaves	When enabled, a leave day immediately before and after a company-wide (global) holiday is also counted as leave, closing the gap around the holiday.
Working Hours grid	Day of Week, Day Period (Morning/Afternoon), Work from, Work to, and Week Even/Odd, defining the schedule itself — for example a reduced Ramadan schedule.

✓ Tip

Create a separate Working Times record for temporary schedules (such as a Ramadan working-hours change) rather than editing the standard one, so you can switch back afterward without re-entering the original hours.

8. Automated Email Reports

The module can automatically email dashboard summaries to configured recipients on a Daily, Weekly, or Monthly schedule, driven by an Odoo Cron job.

8.1 View Existing Reports

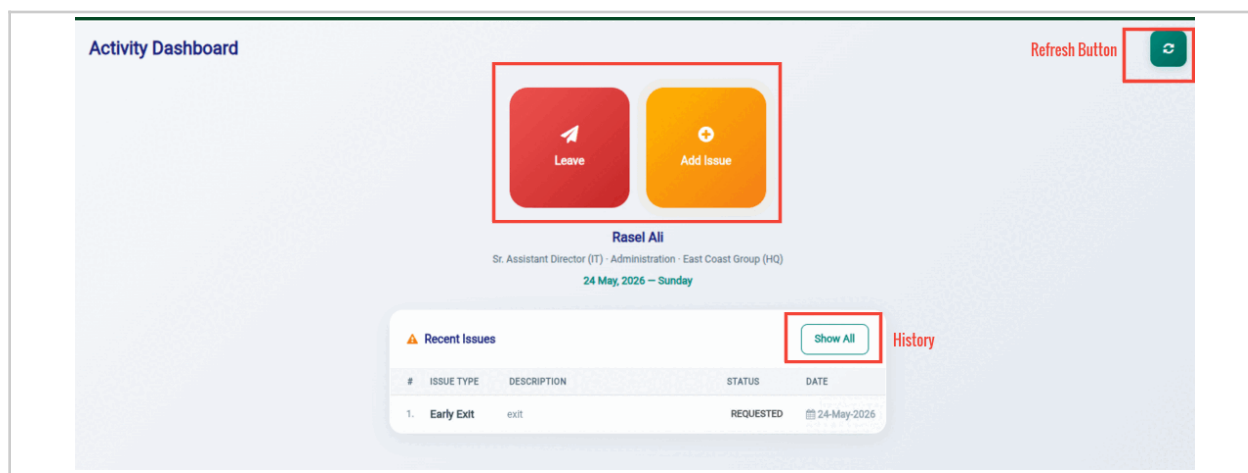


Figure 11 — Email Reports list showing active Daily Employee Activity Reports

Navigate to Configuration → Email Reports to see all configured schedules — name, periodicity, next send date, status, and company.

8.2 Create a New Email Report

Click + Create to open the creation form.

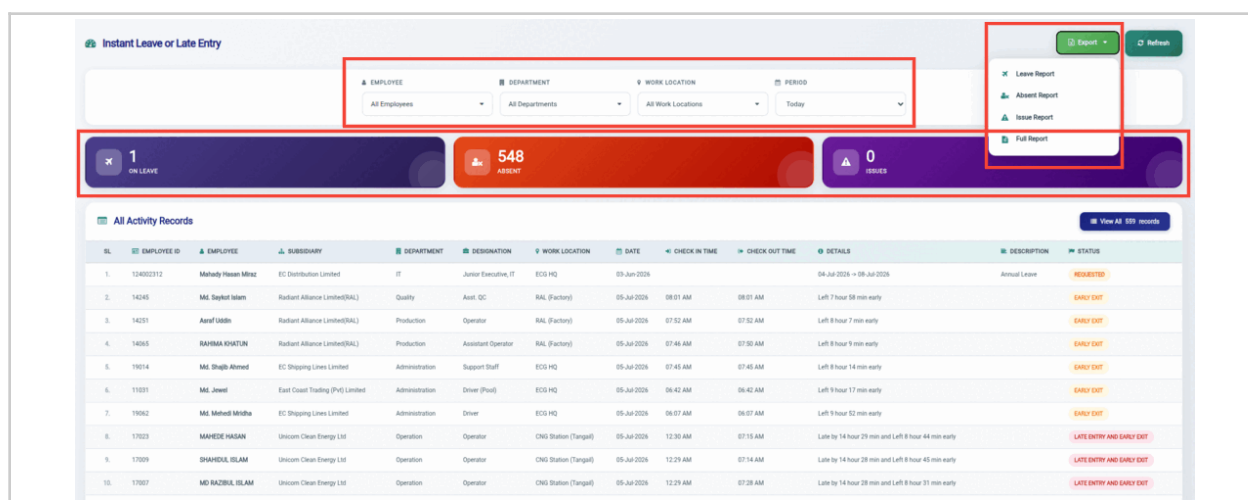


Figure 12 — Email Report form: Periodicity, Company, Reports to Include, and Recipients

1. Enter a descriptive Report Name.
2. Set Periodicity — Daily, Weekly, or Monthly.

3. Set Next Send Date — when the first automated send should occur.
4. Select the Company whose data should be included.
5. Under Reports to Include, tick any combination of: Leave Report, Absent Report, Issue Report, Full Report.
6. In the Recipients tab, click Add a line and enter each recipient's name and email.
7. Click Activate for everyone to enable the schedule, or Send Now to dispatch immediately.

⚠ Important

The Company field is mandatory. Each Email Report record is scoped to a single company. Create one record per company if you need multi-company coverage.

8.3 Scheduled Action (Cron Job)

The automated dispatch is powered by the Employee Activity: Send Scheduled Reports Cron job. Inspect or adjust it at Configuration → Scheduled Actions.

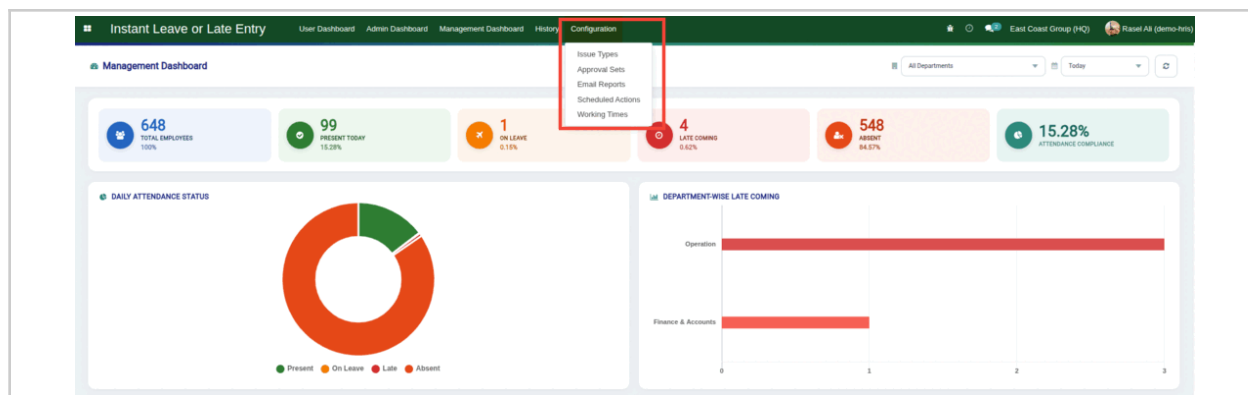


Figure 13 — Scheduled Action: Execute Every (1 Day), Active toggle, Next Execution Date

Field	What to check
Execute Every	Set to 1 Days for daily reports.
Active	Must be toggled ON — otherwise no emails are sent automatically.
Next Execution Date	Should be a future timestamp. If stuck in the past, the Cron has not run.
Run Manually	Click to trigger an immediate send for testing.

9. Business Rules & Known Platform Behavior (New in v2.0)

This section captures the behavioural rules and observations recorded during the East Coast Group (ECG) rollout. They are not bugs to fix in this manual — they are the intended, documented behavior every administrator and reviewer should expect.

9.1 Multi-Company Login Default

Rule

If a user has permission for multiple companies/subsidiaries, all of those companies should be selected by default every time the user logs into the system.

Do not assume a returning multi-company user has to manually re-select their companies each session — if they do, treat it as a configuration issue rather than expected behavior.

9.2 Activity Dashboard Behavior

- The landing-page activity view and the Activity Dashboard reached from the menu must behave identically — same data, same filters, same permissions.
- The Work Location field in this module must match the Attendance Location field used in the Attendance module — the same physical site should never appear under two different labels.
- The Configuration menu must be visible only to Configuration Manager and Super Manager access — never to a plain Manager or general Super Manager without configuration rights.

9.3 Leave Management Rules

- Description is a mandatory field on every leave request — a request cannot be submitted without a reason.
- Standard User-role employees cannot select or apply leave on behalf of anyone else.
- Save vs. Request Submit: Save stores the request as a Draft only (consider labelling it "Save as Draft" in the UI to avoid confusion). Request Submit finalizes and submits the application in one action — pressing Save first is not required before submitting.

9.4 Approval Hierarchy Workflow

- Approval order must be sequential — a second-level approver should never receive a request before the first-level approver has acted on it.
- A pending request should be visible only to the current approver in the chain, not to approvers further down the sequence.
- Approval history/logs must be displayed accurately against each request, showing who approved or rejected it and when.

9.5 Email Notification Rules

- Emails sent for approved requests (or any status other than pending) must not include a Refuse button — that action should only be available to the current approver inside the system.

- Leave summary emails follow a fixed layout communicated separately by the rollout team; keep the format consistent across recipients.
- Late attendance is reported by email using the same Late Coming definition as the dashboard, respecting each schedule's Late Check-in Buffer (Section 7.4).

10. Troubleshooting

10.1 Dashboard shows no data

- Verify the correct company is selected in the Odoo company switcher (top navigation bar).
- Check that the user's Allowed Companies include the target company.
- If Multi Department access is set, confirm at least one Allowed Department is listed in the profile.
- Confirm employee records actually belong to the selected company and department.

10.2 Dropdowns or filters are not working

Force-reload the browser's cached assets after any module update:

- Windows / Linux: Ctrl + F5
- macOS: Cmd + Shift + R

10.3 Automated emails are not being sent

1. Go to Configuration → Scheduled Actions.
2. Open Employee Activity: Send Scheduled Reports.
3. Confirm the Active toggle is ON.
4. Check that Next Execution Date is not stuck in the past.
5. Click Run Manually to trigger a test send and review the Odoo mail logs for errors.

✓ Tip

Set the Scheduler User to a dedicated technical account (e.g., HR Bots) rather than a real employee, to avoid failures if that account is later deactivated.

10.4 Employee cannot submit issues for another person

By design — User role employees can only submit issues for themselves. Managers can log issues on behalf of a subordinate from the issues list view (accessible via the Issues KPI card).

10.5 Late Check-in Buffer doesn't seem to apply

- Confirm the employee's Working Times record is the one you edited — multiple Working Times records can exist per company.
- Late Check-in Buffer is in minutes, not hours; a value of 30 means a 30-minute grace period, not 30 hours.
- Changes to Working Times take effect for check-ins after the change is saved, not retroactively.

10.6 A refused/rejected request still shows in an export

- Refused leave applications and rejected issues must never appear in the Full Activity, Leave, or Issue exports — only Submitted/Requested, Approved, and status-relevant records should be present (see Section 5.6).
- If a refused record appears, re-check the export filter and report scope before assuming the underlying data is wrong.

11. Glossary

Term	Definition
cids	Company IDs — the active company context in Odoo, controlled by the top-navigation company switcher.
Cron Job	A background scheduled task Odoo runs automatically at a set interval (e.g., daily email at 18:00).
RBAC	Role-Based Access Control — permissions assigned by role (User, Manager, Configuration Manager, Super Manager) rather than individually.
KPI Card	Key Performance Indicator card — a clickable summary tile on the dashboard showing a single metric.
Work Location	A physical or logical location label (Headoffice, Factory, etc.) used to group employee records; must align with Attendance Location.
Multi Department	An Odoo group allowing a user to view data from multiple departments beyond their own.
Issue	A logged activity anomaly submitted by an employee (Late Entry, Early Exit, Emergency).
Approval Set	A multi-step approval workflow assigned to one or more issue categories.
Working Times (new)	A configuration record defining a schedule's expected hours, Late Check-in Buffer, Sandwich Rule setting, and weekly Working Hours grid.
Late Check-in Buffer (new)	The grace period, in minutes, before a check-in after the scheduled start time is flagged as Late Coming.
Sandwich Rule (new)	A leave-management rule that, when enabled, also counts the leave day(s) immediately bracketing a global holiday as leave.
History (new)	The unified navigation tab provides a full, filterable list of past activity records.
Configuration Manager (new)	An access role granting Configuration menu access (Issue Types, Approval Sets, Email Reports, Scheduled Actions, Working Times) without full Super Manager rights.
XLSX	The Microsoft Excel file format used for all dashboard exports.
Chart.js	The open-source JavaScript library rendering the interactive charts on the dashboards.

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