Org Chart & Headcount Pla

User Guide · Odoo 18.0 & 19.0

Live org chart, vacancy and open-role tracking, plus headcount budget vs actual per department

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1. Overview

Org Chart & Headcount Planner ==========

Stop keeping the org chart in PowerPoint. This module builds a live reporting structure from your employees and departments, tracks open roles (positions you plan to fill but have not yet), and gives every department a headcount budget so you can see budget vs actual vs open at a glance.

Features: * Headcount plan per department & period with budgeted FTE and budgeted cost. * Open-role records (planned positions) with target start date, status pipeline draft -> approved -> open -> filled / cancelled, and linkage to the employee that eventually fills them. * Live computed actuals: filled headcount, FTE and salary cost rolled up from active employees, compared to the plan with variance figures. * An org-chart view of the reporting hierarchy and a variance report.

Everything is computed from your own hr.employee / hr.department data - no external service.

2. Installation

Open Apps, click Update Apps List, search for “Org Chart & Headcount Pla” (technical name **gb_org_chart_headcount_planner**) and press Install. The module supports Odoo 18.0 and 19.0, Community and Enterprise.

3. Menus & Navigation

After install the following menus become available:

- Headcount
- Headcount Plans
- Open Roles
- Roll Over Plans
- Variance Report

4. Feature & Data-Model Reference

The app implements the following records and engines:

Model	Purpose
headcount.plan	Headcount Plan
headcount.open.role	Open Role / Planned Position
headcount.variance.report	Headcount Variance Report
headcount.rollover.wizard	Roll Over Headcount Plans to Next Period

5. Typical Workflow

1. Open the app's Configuration menu and set up the master data / policies it needs.
2. Create the main operational record from its primary menu.
3. Use the action buttons on the form (e.g. Confirm / Compute / Post / Generate) to run the engine.
4. Review the results in the list, pivot and report views; export or post where applicable.

6. Support

Email **support@pokutsoft.com** or visit **https://pokutsoft.com**. Please include your Odoo version (18.0 / 19.0) and the module technical name.