Shift Planning & Rota

User Guide · Odoo 18.0 & 19.0

Build staff rotas, track availability, spot coverage gaps and publish shifts

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1. Overview

Shift Planning & Rota (Community) ==========

A complete rota/scheduling tool for Odoo Community. Plan shifts per employee and role, capture staff availability and time-off, detect over/under coverage against a required-headcount template, and publish the rota so staff can see their assigned shifts.

Key features ---------- * Weekly rota plans with draft -> published -> closed lifecycle. * Shift assignments with start/end, break, paid hours, role and cost computation. * Per-employee availability windows and unavailability (with overlap detection). * Coverage requirements per day/role with automatic gap analysis. * Conflict detection: double-booking, availability breaches, rest-period breaches. * One-click duplicate of last week's rota and bulk publish.

No Enterprise dependency. Pure Community implementation.

2. Installation

Open Apps, click Update Apps List, search for “Shift Planning & Rota” (technical name **gb_shift_planning_rota**) 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:

- Rota
- Rotas
- Shifts
- People
- Availability
- Time Off
- Configuration
- Roles
- Skills

4. Feature & Data-Model Reference

The app implements the following records and engines:

Model	Purpose
gb.rota.shift	Rota Shift Assignment
gb.rota.plan	Weekly Rota Plan
gb.rota.availability	Employee Weekly Availability Window
gb.rota.role	Rota Role / Position
gb.rota.coverage	Rota Coverage Requirement
gb.rota.duplicate.wizard	Duplicate Rota to a New Week

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.