



CUSTOMER HANDBOOK · BASEUP LABS

Everything BaseUp HR does, in the order you will use it

BaseUp HR is a Philippine payroll and human resources suite for Odoo 20. It takes an employee from hiring paperwork through daily time capture, premium pay, statutory deductions and a posted journal entry — *without a spreadsheet in the middle*. This handbook is the complete feature list, grouped the way the work actually flows.

VERSION	PLATFORM	LOCALISATION
20.0.1.0.0	Odoo 20 Enterprise	Philippines
DATA MODELS	LICENSE	PUBLISHER
90+	OPL-1	BaseUp Labs

CONTENTS

I	What you have bought
II	People & employment
III	Schedules & rest days
IV	Attendance & time capture
V	Overtime, night differential & holidays
VI	Leave & work-from-home
VII	Multi-level approvals
VIII	Payroll processing
IX	Statutory contributions & tax
X	Loans, benefits & adjustments
XI	Payroll accounting
XII	Reports & documents
XIII	Dashboard & analytics
XIV	Access profiles & security
XV	Administration
XVI	Requirements & licensing

A **PH** tick means the feature implements a specific Philippine statutory rule — a contribution table, a premium rate, or a BIR form.

I What you have bought

One installed application, sixteen working areas. Everything below ships in the same module — there is nothing further to buy, and no separate connector to configure.

Employee records

Full 201 file, family and emergency contacts, government IDs, badges, expiry alerts.

Work schedules

Split shifts, unpaid breaks, grace periods, rest-day calendars, night-shift flags.

Biometrics

ZKTeco device sync, fingerprint user enrolment, scheduled punch download.

Night differential

Per-shift ND detection with its own configurable rate table.

Leave

Allocations by fiscal year, accrual, conversion to cash, half-paid types.

Approvals

Ordered approver chains for leave, overtime and expenses.

Statutory tables

SSS, PhilHealth, Pag-IBIG and BIR withholding, versioned by circular.

Accounting

Journal entries per register, default GL account mapping, bank file export.

Contracts

Daily, monthly and hourly pay bases, wage rates, premium settings, renewals.

Attendance

Kiosk, geofenced check-in, bulk entry, late and undertime, DTR generation.

Overtime

Fifteen OT categories across rest days and three holiday classes.

Holidays

Regular, special and double holiday pay, with automatic calendar sync.

Work-from-home

Quota per year, unlimited-WFH contracts, remote kiosk check-in.

Payroll

Payroll periods, registers, payslips, 13th month, final pay, refunds.

Loans & canteen

Amortised loans, salary advances, canteen charges, recurring adjustments.

Reports

Payslips, DTR, payroll registers, BIR 2316, certificates, badges, dashboard.

II People & employment

The employee record is the spine of the system. Everything downstream — a schedule, a payslip, a BIR form — reads from it and from the employment contract attached to it.

Employees ▶ Employees · Contracts · Employee Trainings

The employee file

Philippine name handling

Last, first, middle and extension name held as separate fields, assembled into a display name by a configurable **name format** and **letter case** — so `DELA CRUZ, Juan P.` renders consistently on every payslip, DTR and certificate.

Government identifiers

SSS, PhilHealth, Pag-IBIG and TIN captured on the employee, with an RDO code and registered, local and foreign addresses for BIR reporting. PH

Family & dependents

A dedicated family-members table and a separate emergency-contact table, rather than free text in a note.

Service milestones

Joining date, retirement date, age and years-in-service maintained nightly by scheduled jobs, so tenure reports never go stale.

Document expiry alerts

An **HR Employee Data Expiration** automation watches ID, passport, work-permit and contract end dates, with the notice period set in configuration.

Bank & disbursement

Salary-through-ATM flag plus employee bank accounts whose holder name is filled from the formatted employee name.

Training record

Training history kept against the employee, alongside Odoo's own appraisal, skills and org-chart features.

User provisioning

Create an Odoo login straight from the employee form; a **New User Invite** mail template goes out with it.

Employment contracts

Contracts carry the pay basis and every switch that governs how that employee's payroll computes. Duplicating a contract is deliberately blocked — you renew instead, from a button that opens a fresh contract with the previous terms carried forward. The old contract closes that day and the new one takes effect the next.

SETTING	OPTIONS	WHAT IT DRIVES
Wage type	Daily · Monthly · Hourly	Which formula computes basic pay, and whether daily pay is derived from the monthly wage.
Factor days	26.0833 default	Divisor converting a monthly wage to a daily rate.
Payroll schedule	Weekly · Semi-monthly · Monthly	Which payroll periods the employee appears in, and the withholding-tax bracket set used.
Premium divisor	1 · 2 · 4 ×/month	How often SSS, PhilHealth and Pag-IBIG are deducted; auto-set from the payroll schedule.
Working days a week	261 · 313 · 395 days a year	The paid-days basis — five-day week, six-day week, or every day including rest days and holidays.
Classification	Rank & file · Supervisory · Managerial	Reporting segmentation and premium-pay eligibility.
Computation switches	Late · Undertime · OT · W-Tax · ND · Holiday	Each can be turned off per contract, so a manager on fixed pay is not docked for a late punch.

SETTING	OPTIONS	WHAT IT DRIVES
Variable work schedule	On / off	Flexible staff are paid on total worked hours instead of scheduled in and out times.

Contracts move through New → Running → To Renew → Expired, with a bulk state-change wizard for year-end renewals.

Regional wage rates

A **wage rate** table holds the regional minimum wage by region, sector, establishment type, employment size and area, with basic wage and COLA held separately and the statutory minimum computed from the two. **PH** Attaching a wage rate to a contract fills the daily pay and COLA, which keeps minimum-wage compliance auditable rather than remembered.

III Schedules & rest days

Philippine shift patterns rarely fit one calendar. BaseUp HR models the shift itself, the unpaid break inside it, and the rest days around it — because all three change what an hour is worth.

Attendances ▶ Work Schedules · Employee Work Schedules · Day-Off

Split shifts

A schedule can carry morning and afternoon segments as separate lines, each with its own start and end, so a broken shift is one schedule rather than two attendances.

Unpaid break time

A **break time** value on the schedule is subtracted from worked hours, weekly totals and rest-day overtime alike — an 08:00–17:00 shift with a one-hour lunch reports 40 hours a week, not 45.

Grace period

Minutes of tolerance before a late punch becomes a deduction, set per schedule.

Night-shift flag

Each schedule line declares whether it has night differential, so ND is computed only for shifts that genuinely cross the night window.

Rest days

Rest-day lines still carry hours — the hours an employee would work if called in — but are excluded from working-time totals, so a Mon–Fri schedule reports five days, not seven.

Day-off calendar

Named rest days per employee, plus a bulk **day-off scheduling** wizard to apply a pattern across a group and a period.

Day-off ceiling

A per-contract limit on how many day-offs are allowed inside a payroll period, editable from either the employee's payroll tab or the contract.

Employee work schedules

Assign a calendar to a set of employees for a validity window, with draft, running and closed states, so a seasonal roster change has a paper trail.

Timezone-aware

Schedules default to `Asia/Manila` and every computation localises before it counts a day.

IV Attendance & time capture

Four ways in — kiosk, geofenced device, biometric terminal, or bulk entry by HR — all landing on one attendance record that computes late, undertime, overtime and night differential against the employee's schedule for that day.

Attendances ▶ Manage Attendances ▶ Attendances · Daily Time Record

Capture

Kiosk mode

A token-addressed kiosk page with manual employee selection and badge scanning, patched to show the employee information this module tracks.

Geofenced check-in

Turn on geolocation and a work address becomes a fence: the address is reverse-geocoded into road, village, suburb, city and region fields, and you choose which of those must match — or a straight distance radius in metres.

Employee work locations

Each employee can also carry their own registered places on the **Work Locations** tab of the employee form, matched by radius or by address parts. The kiosk refuses a check-in that is at none of them, and an employee with none registered falls back to the work-address fence. This check, and the WFH check on a remote check-in, run only while the company's Odoo 20 **Device & Location Tracking** setting is on — it ships off.

Bulk attendance

A **multiple attendance** wizard writes attendances for selected employees across a date range or a whole payroll period, with per-weekday toggles and an hour-from/hour-to default.

Pass slips

Official and personal time-out records with destination, duration and remarks, routed through their own draft → confirm → approve flow and picked up by payroll.

What each attendance computes

Late & undertime

Measured against scheduled in and out, after the grace period, with an optional **late deduction table** that maps a band of minutes to the minutes actually charged.

Worked hours

Net of the schedule's unpaid break, with split-shift periods handled separately.

Night differential

ND hours broken out per date against the ND pay-rate table. PH

Holiday detection

Each attendance links the holidays it falls on, with holiday hours, holiday rate and holiday ND hours stored on the line — including double holidays. PH

Rest-day handling

Work on a declared day-off is recognised as such, so every hour routes to the rest-day premium instead of regular pay.

Payroll period

Stamped automatically, which is what lets a payroll run pull attendance without a date filter.

Daily Time Record

The DTR is generated per employee per payroll period and holds one line a day: scheduled in and out, actual time in and out, late, undertime, half-day, absent, ND hours, sick and vacation leave flags, and rest-day flag — plus a second table of the overtime approved for that period. A **multiple DTR** wizard builds them for a whole group at once, and the DTR prints as a landscape PDF for signature.

Biometric devices

ZKTeco-protocol terminals are supported directly — the device protocol ships inside the module, so there is no external library to install on the server.

Device registry

Machines by IP, port and location, with a **Try connection** button that reports the users it can see.

Employee enrolment

Push selected employees onto a device from a wizard; each employee holds their ZK number per machine, so one person can be enrolled on several terminals.

Punch download

Raw punches land in a machine-attendance log with punch type and time, then convert into attendances — on demand, or on the **Auto Import Biometric Attendance** and **Download Attendance** schedules.

Review before import

An import wizard lets you see and select which downloaded punches become attendance records.

v Overtime, night differential & holidays

This is where a Philippine payroll is won or lost. The module treats premium pay as a rate table you can read and audit, not as formulas buried in code.

Overtime ► Overtime Request · Day-Off Schedules · Holidays · Pay

The premium-rate table

Overtime is classified into fifteen types across five groupings, and each type has a row in the **Pay Rates Table** holding a rate percentage, a divisor or multiplier, and the GL debit account to charge. Twenty-three rate rows ship configured, including the night-differential variant of every category. **PH**

GROUPING	TYPES COVERED
Regular	Regular OT · Regular ND OT
Rest day	Day-off · Day-off OT · Day-off ND OT
Special holiday	Special holiday · its OT · on a rest day · rest-day OT · rest-day ND OT
Regular holiday	Regular holiday · its OT · on a rest day · rest-day OT · rest-day ND OT
Double holiday	Double holiday · its OT · on a rest day · rest-day OT · rest-day ND OT

Each row also accepts a **custom rate**, for a CBA or company policy more generous than the statutory minimum.

Overtime requests



Automatic classification

From the request's own dates the system resolves the day of week, the employee's scheduled out time, whether the date is a rest day, and which holidays it touches — then splits the hours across the matching rate rows.

Night-diff split

Hours falling in the night window are broken out and charged at the ND variant of the same category.

Break handling

A **with break** flag deducts the work schedule's own break value from the overtime, not a hardcoded hour.

Minimum OT

A configurable minimum OT threshold, below which a request does not compute.

Raise from attendance

Select attendances and open OT requests for them in bulk; overtime hours flow back onto the DTR and the payslip.

Full audit trail

Requests are chatter-tracked, with a bulk state-change wizard and a per-record approval history.

Night differential

A separate **ND pay rate** table carries the ND percentage — and a custom rate override — applied to the ND hours the attendance engine detects. ND is summarised per payslip with the hours, the computation used and the resulting rate visible on each line.

Holidays

Three holiday classes

Regular (legal), special, and double holidays, each with its own rate row and its own OT and rest-day variants. PH

Company scoping

Holidays carry the companies they apply to, so a plant-level local holiday does not pay out nationwide.

Daily auto-sync

A **Sync Country Holidays** job pulls the public holiday calendar for the configured country — Philippines by default — for the current year, and from November for the next year as well. It flags the records it created, leaving anything you edited by hand untouched. There is also a sync-now action.

Paid regular holiday

A per-contract switch for whether an unworked regular holiday is paid. PH

VI Leave & work-from-home

Leave is allocated against a fiscal year, drawn down per date, and either paid, half-paid, unpaid or converted to cash at year end. Work-from-home is tracked as its own entitlement.

Leaves ▶ Leave Requests · Leave Allocations · WFH Requests · Conf

Allocations

Paid, unpaid, half-paid

Every leave type declares which it is, plus whether it counts as a leave of absence. Sick Leave, Vacation Leave, Birthday Leave and Leave of Absence ship ready to use.

Fiscal-year allocations

Days allocated per employee per leave type with a validity window, tracking days taken and remaining balance as requests are approved.

Accumulated leave

Optional carry-forward of unused annual leave into the next allocation, switched on in configuration.

Convertible leave

A portion of each allocation can be marked convertible; payroll then converts it to cash on a payslip and records the conversion against the allocation.

Bulk allocation

A wizard allocates several leave types to many employees for a fiscal year in one pass — the annual reset in a single screen.

Validity monitoring

A **Leave Allocation: Check Validity** job expires allocations past their window.

Leave requests

Draft → Submitted → Recommending approval → **Approved** · Cancelled

A request expands into one row per leave date, each stamped with its payroll period and marked as it is approved — so a leave spanning a cut-off splits correctly across two payslips instead of landing entirely in one. Requests draw against a named allocation, and the remaining balance is shown as the employee files.

Work-from-home

Yearly quota

Days of WFH per calendar year set on the contract — five by default — enforced when a request is submitted, with used and remaining days computed from approved requests.

Unlimited WFH

A contract flag for fully remote staff: no request needed, no quota enforced, and the kiosk accepts their remote check-in without an approved WFH day.

Working-day counting

Request length counts the employee's actual working days, not calendar days, and overlapping requests are rejected.

Reasoned denial

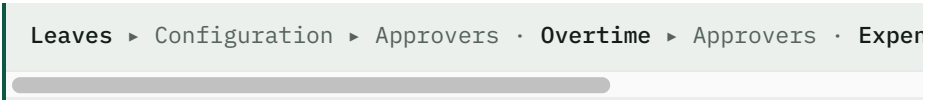
Denials go through a wizard that requires a reason, stored on the request with the approver and decision time.

Own numbering

WFH requests carry their own sequence, so they are citable in a policy discussion.

VII Multi-level approvals

One approver list per request type, set once by an administrator. Leave, overtime and expenses are configured independently — and left alone entirely if you prefer single-step approval.



Leaves ▶ Configuration ▶ Approvers · **Overtime** ▶ Approvers · Expenses

Ordered chains

Approvers are sequenced, so a request moves up a defined ladder rather than to whoever opens it first.

Scoped by company, department or job

An approver entry can be limited to a company, a department or a job position, which is how one configuration serves several business units.

Progress on the record

Each request shows an approval progress line and whether the current user is the one who can act — no guessing whose desk it is on.

Reset on resubmission

Sending a record back to draft clears the approvals already given, so an amended request is re-approved rather than inheriting consent for different numbers.

Opt-in by type

Leaving a type's approver list empty keeps that document on its original single approval. Nothing changes until you configure it.

Payroll runs against a **payroll period**, not a pair of dates typed in by hand. Generate the year's periods once and every attendance, overtime request, leave date and loan instalment files itself into the right one.

Payroll ► Payroll Periods · Payroll ► Payroll Registers · Payslip

Payroll periods

Generated in bulk

A wizard generates a year of weekly, semi-monthly or monthly periods for the selected companies in one action.

Semi-monthly variants

Choose true 15th-and-end-of-month periods, or nominate two specific cut-off start dates each month.

Per-date settings

Each date inside a period can independently allow or disallow late and undertime charges, with a memo — the mechanism for a company-declared suspension of work.

Quarter awareness

Periods carry a quarter, which the contribution configuration uses to place deductions in the right pay run.

The run

- 01 Create a **payroll register** for a company, fiscal year, payroll schedule and period; the salary journal and cash-in-bank account default in.
- 02 **Generate payslips** for the employees in scope — by department, by parent department, or by explicit selection.
- 03 **Compute**. Each payslip pulls its attendance, DTR, overtime, night differential, leave dates, holidays, loans, canteen charges and recurring adjustments for the period.

- 04 **Review** against the register's own roll-up: total late, undertime, overtime, night differential, premiums, withholding tax, other earnings, other deductions, gross taxable and net.
- 05 **Confirm**, optionally without recomputing, so reviewed figures cannot silently change under you.
- 06 **Close** the register and post the journal entry to the salary journal.
- 07 **Pay** — mark the register paid, and export the bank disbursement file.
- 08 **Send payslips** by email, as payslip only or payslip with DTR attached.



What a payslip shows

BLOCK	LINES
Worked time	Regular worked days · paid leave · vacation and sick leave with amounts · unpaid leave and absences · half-days
Time charges	Late · undertime · each with hours and amount
Premium pay	Overtime hours and amount, itemised by rate category · night differential hours and amount, itemised per date
Earnings	Basic pay · COLA · other taxable · other non-taxable earnings · 13th month · leave conversions
Statutory	SSS employee and employer · SSS MPF employee and employer · PhilHealth both shares · Pag-IBIG both shares · withholding tax PH
Other deductions	Loan instalments · canteen charges · recurring and one-off adjustments
Totals	Total employee premiums · gross taxable · net pay

Payslips carry a generated barcode, an overtime summary table, a leave summary table and a night-differential summary table, all of which print on the payslip PDF.

Special runs

13th month pay

Flag the register as a 13th month release and nominate exactly which payroll periods form the computation base. **PH**

Final pay

A final-pay flag on the payslip for separating employees, which changes how the period's entitlements are settled.

Leave conversion run

Mark the register convertible and the convertible portion of each allocation is paid out and recorded against the allocation.

Refunds

Refund a register or a single payslip and the system produces credit-note payslips, excluded from every total so the originals still reconcile.

Payroll archives

Historic payroll retained in an archive model, kept out of the live register list.

Controls you can set

- **Confirm without recomputing** — default on, so confirmation is not a silent recalculation.
- **Allow cancelling confirmed payslips** — off by default; turn it on only if your process needs it.
- **Allow editing payslip lines** — off by default, for sites that want computed figures to stay computed.
- **Taxable overtime** — whether OT enters gross taxable. **PH**
- **Pag-IBIG maximum limit** — the contribution cap applied at computation. **PH**
- **Leaves with positive values** — how leave days and hours are signed in worked-days reporting.
- **Exclude premiums from gross taxable** — set per contract. **PH**
- **Include empty payroll variables** and **include "Received by"** — payslip print options, set per company.

IX Statutory contributions & tax

Every government table is a versioned record with an effectivity date and a draft, active or expired state. When an agency issues a new circular you add it, date it, and activate it — you do not wait for a software release. PH

Payroll ▶ Configuration ▶ Premiums and Tax Tables ▶ SSS · PHIC ·

TABLE	BRACKETED BY	HOLDS
SSS	Monthly salary range	Regular SS employee and employer rates, EC employer share, MPF employee and employer rates, with all totals computed. Ships with the Circular 2024-006 schedule loaded.
PhilHealth	Monthly salary range	Premium rate percentage and the resulting monthly premium.
Pag-IBIG	Monthly salary range	Employee and employer rate, as a percentage or a fixed amount, with a configurable maximum limit.
Withholding tax	Payroll schedule × compensation range	Prescribed withholding tax and tax-on-excess percentage, with separate bracket sets for daily, weekly, semi-monthly and monthly payroll. Twenty-four bracket rows ship loaded.

Deduction scheduling

A **premiums and tax configuration** record decides, per payroll schedule, when each contribution is actually deducted — first half, second half, both halves, or nominated quarters of a weekly cycle — and whether the premium is computed on the basic wage or on basic pay. Contracts can override the computation basis per employee, and each of SSS, PhilHealth and Pag-IBIG can be switched off or set to a fixed amount on an individual contract.

BIR Form 2316

Annual certificates of compensation payment and tax withheld are generated per employee for a nominated year and period. PH

Printing: Employees ▶ Employees ▶ open an employee ▶ ⚙ Print ▶ BI

The report is bound to the employee model, so it appears in the Print dropdown on both the employee form and the employee list view. Select several employees in the list and it produces one PDF per employee in a single run, named

BIR_Form_2316_<employee>_<year>.pdf . There is no menu item for the form — the Print binding is the only route.

Data entry: Employee form ▶ BIR Form 2316 tab

ADMINISTRATOR ACCESS

The BIR Form 2316 tab is available to users with Settings / Administrator access. Other profiles, including HR Manager, can print a completed form but do not fill the tab itself. If your payroll officer needs to prepare 2316s directly, your BaseUp implementer can extend that access.

The output is not a rendered layout — the module fills the **official BIR PDF form fields** and flattens the result so it is non-editable (flattening needs `PyMuPDF` on the server). The blank government form ships inside the module. Most figures are computed from the employee's payslips for the period rather than typed by hand. The form carries the full statutory breakdown the BIR asks for:

- **Employer details** — employer type, RDO code, registered and local addresses, signatory name and signature image.
- **Non-taxable** — basic salary of a minimum-wage earner, holiday pay, overtime, night-shift differential, hazard pay, 13th month and other benefits, de minimis benefits, employee government contributions.
- **Taxable** — basic salary, other compensation, gross taxable compensation, tax due, tax withheld.
- **Previous employer** — TIN, name, address, taxable compensation and tax withheld, for mid-year hires.
- **Credits** — PERA contributions, the five-percent tax credit, and tax withheld net of credit.
- **Status flags** — minimum-wage earner and overseas Filipino worker.

x Loans, benefits & adjustments

Anything that recurs on a payslip and is not a statutory deduction lives here — company loans, agency loans, canteen charges, allowances and one-off corrections.

Salary Loans ▶ Loan Requests · Canteen Charges

Employee loans

Draft → Submitted → **Approved** · Cancelled

Amortisation schedule

Enter the loan amount, the term in months and the payment per payroll, and the instalment lines are laid out across the payment window. Each line is marked paid as the payslip that took it is processed.

Agency loans

A beginning loan amount and reference number carry balances brought over from SSS or Pag-IBIG loans already in progress. **PH**

Running balance

Total paid and remaining balance computed from the instalment lines, visible on the loan and countable per employee from the employee form.

Deduction mapping

Each loan points at the payroll adjustment it deducts through, plus its other-assets and liability accounts, so the payslip line and the journal entry agree.

Chatter-tracked

Loan amount, terms, payment and approval dates are all tracked; duplicating a loan request is blocked outright.

Canteen charges

Numbered meal and store charges per employee per date, confirmed and then recovered on the next payslip, with their own liability and other-assets accounts and an optional journal entry on confirmation.

Payroll adjustments & structures

Adjustment catalogue

Named earnings and deductions, each with its own GL accounts, that become payslip lines. Defaults for payroll, other-assets and liability accounts can be set once in configuration and pushed onto every existing adjustment with one button.

Recurring structures

Per-employee structure lines attach an adjustment to a contract so it appears on every payslip until it is marked done — the mechanism for allowances, uniform deductions and staggered recoveries. Lines can be opened, closed and bulk state-changed.

One-off compensation

A **compensation adjustment** records a single earning or deduction on a date against a contract, consumed by the payslip covering that date.

Rice allowance

A dedicated computation for the rice-subsidy benefit. PH

Payroll posts to the general ledger from the same screen that computed it, using account mappings you set once.

Payroll ► Configuration ► Settings · Bank Accounts

Salary journal

Resolved per company by name or code, with a guided prompt to create it if it is missing rather than a raw error.

Default account mapping

Cash-in-bank and salaries-and-wages accounts set globally; employees may carry their own salaries-and-wages account where cost centres differ.

Contribution accounts

Employee-credit, employer-debit and employer-credit accounts per contribution — with a separate set for SSS MPF — settable as defaults and applied to every contribution configuration in one action.

Overtime accounts

A debit account per overtime rate category, so premium pay can be tracked separately from base salary, with a one-click default across all categories.

Posting control

Journal entries for payroll registers, loans and canteen charges are each switchable, so you can run payroll before the accounting side is configured.

Bank disbursement file

Generate a fixed-width bank credit file from a register — header with the company account, one line per employee net pay, and a trailer with count and total — attached to the register for upload.

Fiscal years

Payroll registers, payslips and leave allocations are all anchored to an accounting fiscal year.

XII Reports & documents

Everything a Philippine HR office is asked to produce, printable from the record it belongs to.

DOCUMENT	FORMAT	PRINTED FROM
Payslip	PDF	Payslip or register; emailable, with or without the DTR attached
Daily Time Record	PDF , landscape	Employee DTR for a payroll period
Payroll Register	PDF , landscape	Payroll register — the full per-employee roll-up
Payroll Register Summary	MS Excel	Payroll register, for finance hand-off
BIR Form 2316	PDF	Employee, for a nominated year and period PH
Certificate of Employment	PDF	Employee or contract
Employee Badge	PDF	Employee — company ID with barcode
Work Schedule	PDF	A payroll period, filtered by department or employee

Analytical views

- **Payslip report** and **detailed payslip report** — SQL-backed pivot views for slicing payroll across periods, departments and adjustments without exporting.
- **Attendance analysis** and **work schedule report** — grouped attendance and roster views for a period.
- **Overtime, leave and night-differential summaries** — held per payslip, so a figure on a payslip can always be traced back to the hours behind it.

An HR manager's opening screen: headcount at a glance, then the shape of the workforce behind it.

Employees ▸ Dashboard

Headline counts

Active employees, running contracts and departments, scoped to the companies currently selected.

Headcount by department

Distribution across the organisation, drawn as a chart.

Sex and age profile

Demographic breakdown by sex across age bands.

Civil status

Marital-status distribution.

Employment type

Headcount per employment type — the Permanent type the module ships, Odoo's own types, and any you add.

Length of service

Tenure bands, computed from the nightly years-in-service job.

Print & theme

The dashboard prints, and follows the light or dark theme of the session.

The organisation chart and Odoo's gamification badges, challenges and goals sit alongside the dashboard in the same app. Odoo's own Dashboards app is installed with the module and shown only to HR managers.

XIV Access profiles & security

Five ready-made access profiles under a single **BaseupPH Access** setting. Pick one per user and the underlying Odoo groups, model permissions and record rules follow.

Settings ▶ Users & Companies ▶ Users ▶ BaseupPH Access

PROFILE	SEES	CAN DO
Employee Access	Own employee record and own contract	Read and update own record; read own contract and payslips; file leave, overtime, WFH and expenses. Cannot delete records or edit contracts.
Manager Access	Own record plus the team reporting to them	Everything an employee can, plus approve team leave and expenses.
HR Manager Access	All employees	Full HR administration — employees, leave, recruitment, attendance, appraisals, and payroll at user level.
Accountant Access	Payroll and finance	Payroll management, expense management, attendance management, and invoicing.
Kiosk Mode Only	The kiosk page	Nothing else — the profile for a shared terminal login.

Alongside these, dedicated payroll user and payroll manager groups, and biometric user and manager groups, gate the payroll and device screens; menus are permissioned in a final pass after every menu exists.

Self-service

Every profile except Kiosk Mode Only gets a **My Profile** app that opens the reader's own employee record read-only, with their own payslips reachable from a counter on the form. Employees see their own data through isolated views rather than through a loosened version of the manager's screen.

Multi-company

- Payroll registers, payslips, contracts, leave, loans, canteen charges and adjustments are all company-scoped, and selection lists respect the companies active in the session.
- Payroll periods and holidays can be shared across several companies at once.
- Document sequences can be granted to a set of companies, so each entity numbers its own loans and charges without duplicating configuration.
- The dashboard, contribution configuration and journal resolution all follow the company selector.

Automation

SCHEDULED JOB	DOES
Auto Import Biometric Attendance	Converts downloaded device punches into attendance records
Download Attendance	Pulls new punches from registered ZKTeco terminals
Sync Country Holidays	Refreshes the statutory holiday calendar for the configured country
Sync Contribution Tables (SSS/PHIC/HDMF)	Checks the agencies' published tables monthly and flags a change; anything it reads lands as a draft for HR to check
Activate Due Circulars	Activates a loaded contribution circular once its effectivity date arrives
Leave Allocation: Check Validity	Expires allocations past their validity window
Employee: Years in Service	Recomputes tenure
Employee: Compute Age	Recomputes age
HR Employee Data Expiration	Raises notices for expiring IDs, permits and contracts
Sync Licenses from API	Keeps license records aligned with the license server

Branding & presentation

- A **system name** setting replaces the product name in page titles and browser tabs.
- A backend theme stylesheet ships with the module.
- An **SMTP From** setting fixes the sender address used for outgoing payslips and notices.
- Company signatory name and signature image are held for certificates and BIR forms.

Expenses & document capture

Employee expenses gain the same ordered approver chain as leave and overtime. Vendor bill and customer invoice digitalisation modes, and a single-invoice-line-per-tax option, are exposed in settings for sites using Odoo's document extraction.

Guided tours & quality

Eleven in-app guided tours walk a new administrator through employee creation, payroll configuration, payroll period generation, payslip computation, the payroll register, DTR, leave allocation, overtime configuration, multiple attendance, biometric attendance and the chart of accounts. Two more check that the HR dashboard renders and that every menu of the module's apps opens. Behind them sits an extensive automated test suite, exercised against every release.

XVI Requirements & licensing

ITEM	REQUIREMENT
Odoo	20.0 Enterprise
Odoo apps required	Employees, Payroll, Payroll Accounting, Time Off, Attendances, Recruitment, Appraisals, Expenses, Accounting, Sign, CRM, Contacts, Dashboards, Philippine localisation
Python packages	geopy · PyMuPDF, on top of Odoo 20's own requirements
Biometric library	None — the ZKTeco protocol ships inside the module
Charting	Chart.js, loaded from CDN for the dashboard
Holiday sync	Outbound HTTPS to the public holiday service, if enabled
Default timezone	Asia/Manila
License	OPL-1 (Odoo Proprietary License v1.0)

ENTERPRISE EDITION REQUIRED

BaseUp HR extends Odoo Enterprise HR applications — payroll, appraisals, expense extraction, e-signature and full accounting among them. It will not install on Odoo Community.

PREREQUISITE · SERVER PACKAGES

Two Python packages beyond Odoo 20's own need to be on the server: `geopy`, without which the module does not load, and `PyMuPDF`, which flattens the issued BIR Form 2316 so it cannot be edited. Please confirm both with your hosting provider as part of go-live preparation.

License activation

Your license key is validated in two places: once when the module is installed or upgraded, and then during use, against the BaseUp license service. Licenses are held as records against your customer account with purchase date, product, order reference and status, and are kept in step with the license server by a scheduled sync. Keep the key that came with your purchase — it is what an upgrade checks.

Support

BaseUp Labs provides technical support and customisation for this module. For licensing questions, upgrades, or an implementation review, contact your BaseUp Labs account manager.

BaseUp HR · Comprehensive HR Management Suite for Philippine Businesses
Module **baseup_human_resources** · version **20.0.1.0.0** · Odoo 20 Enterprise · license **OPL-1**
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