

TrackLeave360 - Phase 1: Problem Understanding & Industry Analysis

Requirement Gathering

Core Functionalities: Employee self-service portal for leave requests, multi-level approval workflows with automated routing, real-time leave balance calculations, mobile-responsive interface, integration with HRIS/payroll systems, comprehensive reporting and analytics, document management for certificates, automated email/SMS notifications, FMLA compliance validation, and complete audit trail maintenance.

Technical Requirements: Support 1000+ users, real-time data sync, mobile-first design, SSO integration, API connectivity, role-based security, automated backup, GDPR/CCPA compliance.

Stakeholder Analysis

HR Manager: Strategic planning, policy compliance, executive dashboards, full admin access. *Pain:*

Manual tracking, policy violations **HR Administrators:** Daily processing, record keeping, streamlined interface, edit permissions. *Pain:* *Time-consuming calculations*

Line Managers: Team coverage, quick approvals, team calendar view, manager-level access. *Pain:* *Last-minute requests, coverage issues*

Employees: Easy requests, balance tracking, mobile interface, self-service access. *Pain:* *Complex processes, approval delays* **Payroll Dept:** Accurate processing, automated export, integration APIs, read-only access.

Pain: *Manual entry, calculation errors*

Business Process Mapping

Leave Request Flow: Employee Request → Policy Validation → Manager Review → HR Verification → Final Approval → Calendar Update → Payroll Integration → Notifications

Key Processes: (1) Request submission via portal, (2) Automatic policy compliance check, (3) Smart routing based on leave type, (4) Manager impact assessment, (5) HR final verification, (6) System updates and calendar blocking, (7) Automated stakeholder notifications.

Balance Management: Onboarding Setup → Periodic Accrual → Usage Tracking → Adjustments → Annual Rollover → Reporting

Industry-Specific Use Case Analysis

Leave Types: Vacation/PTO (accrual-based, advance planning), Sick Leave (immediate, medical docs), FMLA (12-week federal compliance), Bereavement (emergency processing), Jury Duty (court documentation)

Approval Workflows: Standard (Manager only), Multi-level (Manager→Dept Head→HR), HR-Only (FMLA/Medical), Committee (Sabbatical/Special cases)

Policy Configuration: Tenure-based accrual rates, duration-based approval authority, blackout periods, minimum staffing requirements, advance notice rules

AppExchange Exploration

Communication: Slack for Salesforce (team notifications), Microsoft Teams (calendar sync), WhatsApp Business (mobile alerts) **Integration:** MuleSoft Anypoint (enterprise hub), Workday Connector (HRIS sync), Office 365 (calendar/email) **Analytics:** Einstein Analytics (AI insights), Tableau CRM (executive dashboards), Custom Report Builder (compliance reports) **Security & Documents:** DocuSign (digital signatures), Box Integration (secure storage), Shield Encryption (data protection), SSO Connectors (enterprise auth)

Success Metrics

Efficiency: 24-hour processing time, 90% self-service adoption, 60% HR time reduction, 99.9% uptime **Compliance:** 100% FMLA compliance, complete audit trails, 95% violation reduction **Experience:** 4.5/5 satisfaction score, 70% mobile usage, real-time visibility, <4 hour approvals