LU Leave Management System
Product Owner: Elizabeth Venz

Lincoln University (LU) requires a new Leave Management system to maintain the records of leave taken by the employees of the university. The current system requires employees to email leave requests and managers to email approvals which is inefficient and causes errors. The new system will allow employees and their managers to submit and approve leave requests. There are three types of user roles:

- Employees – who can request different types of leave.
- Approval Managers – approve leave requests.
- Admin – manage users, leave types and university and public holidays.

Features:

- An employee needs to login to apply for leave.
- An employee should be alerted when their leave request has been approved or rejected.
- An employee needs to view their own details.
- An employee needs to make a leave request including specifying the type of leave and dates for the leave.
- An employee should be able to see all the leave requests and status.
- An employee should be able to see the leave balance for the year.
- An employee should be able to see the projected leave balance for a particular date.
- An employee can change their password.
- An approval manager can view leave requests.
- An approval manager should be alerted when there are new leave requests.
- An approval manager should be able to approve/reject/edit/delete leave requests.
- An approval manager should be able to search for a particular leave request.
- An approval manager should be able to view an employee's details, balances, requests and projected balances.
- An approval manager should be able to generate reports.
- An admin should be able to manage users.
- An admin should be able to manage leave types.
- An admin should be able to manage university and public holidays.
- An admin should be able to update the leave balances for all employees.

Notes from the Product Owner:

General:
- The Leave Management system is to be accessed from within the existing university staff portal. The login page is only required to include a simple login form with username (email) and password validation.
- A dashboard should display after successful login. All user roles will use the same dashboard – additional functions will be visible and accessible to different user roles.
- All user roles have the employee user role (they are all employees of the university). For example, a user with an approval manager role can access both the employee and approval manager functions. A user with an admin user role can access the employee, manager and admin functions.

- Use a colour scheme inline with the Lincoln University's.
- Employees at the university are organised into a hierarchical structure. Each employee has a position title and belongs to a department. They have an employee that they report to, and they have an approval manager (the approval manager approves their leave).
- Please include records for at least 5 University Departments; one of which should be corporate services. Each academic department comprises at least one professor, two lecturers, and three tutors. Within each department, tutors report to a lecturer and lecturers report to a professor. The professor in each academic department has the leave approval delegation over employees in that department. The corporate services department comprises one Vice-Chancellor – the head of the University, two Human Resources Directors (who have admin roles) a Technology Director (admin role) and a Finance Director. The four directors report to the Vice-Chancellor. The Finance Director can approve the leave of the Vice-Chancellor. The professors in the academic departments report to one of the Human Resources Directors – who can also approve their leave.

Employee:
- Minimum required employee information – Title (e.g. Doctor/Professor/Mr/Mrs), First Name, Family Name, Joined Date, Position Title, Position Start Date, Department.
- When an employee logs into the system, they should see a list of all new leave request approvals/rejections. They can click on the request to view more information – including the managers reason for rejecting a request.
- Employees can view a list with details of their current and historic leave requests.
- Employee Details: Name (including title), username, joined date, position title, position start date, department, reports to name, approval manager name.
- Employee Request Leave:
    o Select leave type. Pick start and end date. (Note – an employee can request a start date up to 1 month prior and an end date up to 1 year in advance), text box for additional info. The system should validate that the employee has not already requested leave or has approved leave for those dates. Ideally, the date picker should have already applied/approved leave and holiday dates not clickable and shaded a different colour.
    o A confirm screen should show the details of the request including a calculation of the leave units requested in both hours and days. (Note – if a leave request date range includes public holidays or weekends, these days are not counted in the calculation).
- View Requests – lists of both unapproved and approved leave (from close of last pay):
    o Start Date, End Date, Leave Type, Additional Info, Units Requested (hours and days)
    o Employees can edit and/or delete unapproved leave.
    o Employees can only view approved leave.
- Employee Leave Balances: Balances (display in both hours and days):
    o Annual Leave – Balance (at close of last pay), Leave approved not paid, Leave applied not yet approved.
    o Sick Leave – Balance (at close of last pay), Leave approved not paid, Leave applied not yet approved.
- Employee Projected Leave Balance: (Note this relates to annual leave only)
    o Employee Selects Projection Date - (this must be a date in the future).
    o Projected Leave Balance at (date selected) hours and days:
        ▪ Calculation to display these fields:

- Annual leave balance (as at close of last pay) (hours/days)
- Less leave applied but not yet paid (hours/days)
- Less leave applied but not yet approved (hours/days)
- Plus projected accrual to (date selected) (hours/days)
- Estimated Projected Leave Balance (hours/days)

Approval Manager:
- When the approval manager logs into the system, they should see a clickable list of all new leave requests.
- The approval manager should have a To Do or Action Items section on the dashboard where they can view a list of leave requests and action the requests. Details required include at least the date requested, from name, leave type, start date, end date, hours/days requested, hours/days current balance. Approval managers should be able to select to view the full details of the leave request, approve, reject or delete a request. If an approval manager selects to delete or reject a leave request, they need to write a reason.
- An approval manager should be able to see a list of all employees that they have the delegated authority to approve leave for. For a selected employee they can view:
  - Details – Name, username, joined date, position title, position start date, department, reports to name, approval manager name.
  - Balances (display in both hours and days):
    - Annual Leave – Balance (at close of last pay), Leave approved not paid, Leave applied not yet approved.
    - Sick Leave – Balance (at close of last pay), Leave approved not paid, Leave applied not yet approved.
  - Requests:
    - Unapproved Leave – start date, end date, leave reason, additional info, units requested (View, Approve, Reject, Edit and Delete).
    - Approved Leave (from the close of last pay) - (View, Reject, Edit and Delete).
  - Projected Balance:
    - Projected Balance Calculator for the employee.
- Two reports are required:
  - 1. Leave Exception Report.
    - This report presents a list of all employees that have an annual leave balance of equal to or greater than 30 days.
    - The list should include, first name, last name, position, department, leave balance (hours), leave balance (days). Sort by highest leave balance.
    - The list should only show employees that the approval manager has the delegated authority to approve leave.
  - 2. Annual Leave Liability Report.
    - This reports a list of all employees and their leave balances for employees that the approval manager has the delegated authority to approve leave.
    - The list should include, first name, last name, position, department, leave balance (hours), leave balance (days). Sort by first name, last name.

Administrator Functions:

- Admin users have access to all the manager functions. They can view all employees. They cannot manage their own leave.
- To manage users, Admin need to view a list of all users including their name and role. There should be a search function. An admin can change the user role of a user – e.g., from Employee to Approval Manager, from Approval Manager to Admin.
- There are seven types of leave. Annual, Bereavement, Parental, Sick Family, Sick Leave, Special Leave without Pay and Special leave with Pay. Admin users need to be able to manage the leave types – edit, add and delete.
- Employees receive 30 annual leave days each year – any unused leave at the end of their employment year (based on their join date) is carried over.
- Employees receive 5 sick days each year. At the end of their employee year (based on their join date), sick leave resets to 5 days.
- You can assume that all employees are full-time employees. They each work a 37.5hr week (7.5 hours per day), Monday to Friday. One day = 7.5hrs.
- Leave is stored in the database in units of hours. Leave is to be presented to users in the system in both units of hours and number of days.
- Use NZ Public Holidays – note holidays dates and holidays change each year. Admin users need to view a list of all available holiday names and dates, and should be able to manage these – edit, add and delete.
- The annual and sick leave balances for all employees are stored in the database and updated by the administrator each fortnight – coinciding with pay runs. The update date along with the balances is to be recorded.

Bonus:

- Employee Hierarchy Chart.
- Employee Full Year Leave Calendar (showing leave applied for/approved and holidays).
- Department Full Year Leave Calendar.