

Leave Management System

Final Project Report

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Abstract

This project focuses on the development of a **Leave Management System** using Salesforce. The system enables employees to submit leave requests digitally and allows managers to approve or reject them through a structured approval workflow. The system automates notifications, maintains transparency, and reduces manual intervention in HR processes.

Phase 1: Problem Definition & Motivation

Existing Challenges

Traditional leave management processes are:

- Manual and time-consuming
- Lacking transparency
- Prone to delays in approval
- Difficult to track historically

Objective

To build an **automated, digital, and transparent Leave Approval System** that:

- Allows employees to request leave through Salesforce

- Routes requests to assigned approvers
- Sends automatic approval/rejection notifications
- Maintains clear leave history records

Advantages

Improvement	Benefit
Automation	Eliminates follow-up and manual communication
Transparency	Employees can track request status anytime
Standardization	Approval process becomes uniform and monitored

Phase 2: Environment Setup & User Roles

- Salesforce **Developer Edition** was used for application setup.
- Two user roles identified:
 - **Employee (Leave Requestor)**
 - **Manager/Approvers (Reviewer)**
- Standard Salesforce Profiles and Permissions used.
- A **Custom Tab** was added for easy navigation to Leave Request records.

Phase 3: Data Model & Object Design

Custom Object: **Leave_Request__c**

Field Name	Data Type	Description
Leave Request Number	Auto Number	Unique leave record identifier
Employee Name	Lookup(User)	Request raised by which employee

Approver	Lookup(User)	Manager / authority who approves
Start Date	Date	Leave start date
End Date	Date	Leave end date
Leave Type	Picklist (Sick, Casual, Earned, Emergency)	Type of leave requested
Reason	Long Text Area	Reason for leave
Status	Picklist (Submitted, Approved, Rejected)	System-updated workflow status

Relationships Involved:

User ↔ Leave Request (Lookup)

Manager ↔ Leave Request (Lookup)

Phase 4: Workflow Automation

Approval Process: "Leave Request Approval"

Stage	Action
Entry Condition	Status = Submitted
Assignee	Approver selected in request
On Approval	Status → Approved + Send Approved Email
On Rejection	Status → Rejected + Send Rejection Email

Email Alerts:

Template Name	Trigger	Recipient
Leave Approved Notification	Manager approves	Employee
Leave Rejected Notification	Manager rejects	Employee

Phase 5: User Interface (UI) Development

A Lightning App Page / Dashboard was created including:

- List View of all Leave Requests
- Status visibility (Submitted, Approved, Rejected)
- Easy navigation for HR / Manager

Also added:

- **Leave Requests Tab** to App Launcher for easy access.

Phase 6: Testing

Test Case	Input	Expected Output	Status
Submit Leave Request	Employee fills form	Status becomes “Submitted”	<input checked="" type="checkbox"/> Passed
Approve Request	Approver Approves	Status → Approved + Email Sent	<input checked="" type="checkbox"/> Passed
Reject Request	Approver Rejects	Status → Rejected + Email Sent	<input checked="" type="checkbox"/> Passed
Missing Approver	Submit without Approver	System prevents submission	<input checked="" type="checkbox"/> Passed

Phase 7: Security Considerations

- Requestor can only view their own requests.
- Approver role controls approval rights.
- Approval actions are logged under **Approval History** for audit and transparency.

Phase 8: Reporting & Dashboard (Future Enhancements)

Possible extensions:

- Leave balance tracking

- Monthly leave report charts
- Approver workload analytics
- Employee Self-Service Portal Integration

Phase 9: System Workflow Demonstration

1. Employee opens **Leave Request** tab.
2. Fills leave information and selects Approver.
3. Clicks **Submit for Approval**.
4. Approver reviews the request in **Approval History** screen.
5. Approver selects **Approve** or **Reject**.
6. Status updates automatically.
7. Corresponding email alert is delivered.
8. Dashboard updates for real-time visibility.

Conclusion

The Leave Management System successfully **automates the approval process**, reduces manual HR effort, improves **clarity**, ensures **faster decisions**, and creates a **transparent workflow environment** within Salesforce. This project demonstrates practical understanding of Salesforce Custom Objects, Approval Processes, Email Alerts, Lightning App UI, and User Management.

Screenshots

SETUP > OBJECT MANAGER
Leave Request

Details Fields & Relationships

Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Restriction Rules Scoping Rules Object Access Triggers Flow Triggers Validation Rules

Fields & Relationships 11 Items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Approver	Approver__c	Lookup(User)		✓
Created By	CreatedById	Lookup(User)		
Employee Name	Employee_Name__c	Lookup(User)		✓
End Date	End_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Leave Request Number	Name	Auto Number		✓
Leave Type	Leave_Type__c	Picklist		
Owner	OwnerId	Lookup(User,Group)		✓
Reason	Reason__c	Long Text Area(256)		
Start Date	Start_Date__c	Date		
Status	Status__c	Picklist		

Developer Edition Welcome Leave Requests ▾

Leave Management Dashboard

Leave Requests All

2 items • Sorted by Leave Request Number • Filtered by All leave requests • Updated a few seconds ago

Leave Request Number	Action
1 LR-0001	<input type="checkbox"/>
2 LR-0002	<input type="checkbox"/>

Approval History (2)

Step Name	Date	Status	Assigned To
Step 1	11/7/2025, 7:07 AM	Rejected	bhargav reddi
Approval Request Submitted	11/7/2025, 7:03 AM	Submitted	bhargav reddi

[View All](#)

Setup Home Object Manager

Q email tem

SETUP Classic Email Templates

Leave Rejected Notification

Preview your email template below.

Email Template Detail

Email Templates from Salesforce	Unified Public Classic Email Templates
Email Template Name	Leave_Rejected_Notification
Template Unique Name	Leave_Rejected_Notification
Encoding	Unicode (UTF-8)
Author	bhargav.reddi [Change]
Description	Sent when leave is rejected
Created By	bhargav.reddi 11/7/2025, 5:17 AM

Available For Use ✓
Last Used Date Times Used
Modified By bhargav.reddi 11/7/2025, 5:26 AM

Email Template

Send Test and Verify Merge Fields

Plain Text Preview

Hello {!Leave_Request__c.Employee_Name__c}.

Your leave request from {!Leave_Request__c.Start_Date__c} to {!Leave_Request__c.End_Date__c} has been rejected.

Please contact your approver for details.

Regards,
HR Team

Leave Request LR-0001

Related Details

Approval History (2)

Step Name	Date	Status	Assigned To
Step 1	11/7/2025, 6:53 AM	Approved	bhargav.reddi
Approval Request Submitted	11/7/2025, 6:45 AM	Submitted	bhargav.reddi

[View All](#)

Developer Edition Welcome Leave Requests

Search...

Leave Request LR-0001

Related Details

Approval History (2)

Step Name	Date	Status	Assigned To
Step 1	11/7/2025, 6:53 AM	Approved	bhargav.reddi
Approval Request Submitted	11/7/2025, 6:45 AM	Submitted	bhargav.reddi

[View All](#)

New Contact New Opportunity New Case

Activity

Sharing Change Owner Sharing Hierarchy Edit Labels Delete Clone Edit

Refresh E

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, or [Printable View](#)

Submit for Approval

No past activity. Past meetings and tasks marked as done [mark up here](#).