Problem Statement

In many organizations, managing employee leave requests and approvals is still handled through manual methods such as emails, spreadsheets, or paper forms. This leads to inefficiencies, lack of visibility, and communication gaps between employees, managers, and HR teams.

- **Employees** often struggle to track their leave balances, request history, and approval status.
- **Managers** face challenges in reviewing and approving leave requests promptly, which may cause delays and disrupt workforce planning.
- **HR teams** spend significant time consolidating leave data, ensuring policy compliance, and generating reports for payroll and management.

The absence of a centralized, automated system results in:

- Delayed approvals and miscommunication.
- Limited visibility into team availability and workforce planning.
- Difficulty in enforcing leave policies consistently. ● Increased administrative burden on HR.

To address these challenges, an automated **Leave Hub in Salesforce CRM** is required. This solution will streamline the entire leave management lifecycle—leave application, approval workflow, balance tracking, policy enforcement, and reporting— providing transparency, efficiency, and improved employee experience.

Use Cases for Leave Tracking App

Submit Leave Request
- **Actor:** Employee
- **Description:** Employee logs into the Salesforce app and submits a leave request by selecting leave type (sick leave, vacation, casual, etc.), start and end dates, and reason.
- **Outcome:** Leave request is saved and routed to the reporting manager for approval.

View Leave Balance
- **Actor:** Employee
- **Description:** Employee checks available leave balance (earned, sick, casual, etc.) before submitting a request.
- **Outcome:** Employee has visibility into their current leave entitlement and can plan accordingly.

Approve/Reject Leave Request

● **Actor:** Manager

Description: Manager receives a notification when an employee submits a leave request. Manager reviews the request and either approves or rejects it. ● **Outcome:** Employee is notified of the decision, and records are updated.

View Team Leave Calendar

- **Actor:** Manager
- **Description:** Manager views a calendar of team members approved leaves to avoid scheduling conflicts.
- **Outcome:** Helps in resource planning and workload management.

Track Leave History

- **Actor:** Employee
- **Description:** Employee views their past leave applications and statuses.
- **Outcome:** Provides transparency and helps employees track patterns.

Generate Leave Reports

- **Actor:** HR Administrator
- **Description:** HR runs reports (monthly/quarterly/yearly) to analyze leave trends, absenteeism, and compliance with policies.
- **Outcome:** Data supports payroll processing and workforce planning.

Define & Manage Leave Policies

- **Actor:** HR Administrator
- **Description:** HR sets leave entitlements, carry-forward rules, and approval hierarchies in Salesforce.
- **Outcome:** Policies are consistently applied across the organization.

Phase 1: Problem Understanding and Industry Analysis

1. Requirement Gathering

The requirements are divided into three categories:

- **Functional Requirements:**
- Employees can submit leave requests (type, duration, reason).
- Employees can view their leave balance and leave history.
- Managers can approve/reject leave requests with comments.
- Team leave calendar for managers to check overlapping leaves.
- HR can define leave policies (entitlements, carry forward, encashment rules).
- HR can generate reports on leave usage, trends, and compliance.
- System sends automated notifications and reminders.

- **Non-Functional Requirements:**

  o Mobile-friendly interface for employees and managers.
  o Role-based access control (Employees, Managers, HR, Admin).
  o Scalability to handle growing workforce.
  o Integration with Payroll/Attendance systems.

- **Reporting Requirements:**

  o Leave usage by employee, department, or period.

  o Trend analysis (sick leaves, absenteeism).

  o Pending leave approvals.

2. Stakeholder Analysis
- **Employees** (apply for leave, check balances, track status).
- **Managers** (approve/reject leave, monitor team availability).
- **HR Team** (set leave policies, track compliance, generate reports).
- **Executives** (analyze absenteeism, plan workforce).
- **System Admins** (configure Salesforce app, manage customization).

3. Business Process Mapping Step-by-step

Workflow:

1. **Employee Submits Request** → Select leave type, dates, reason.
2. **System Validates** → Checks leave balance, policy compliance.
3. **Manager Approval Workflow** → Manager reviews and approves/rejects.

4. **Notifications Triggered** → Employee notified; HR updated.
5. **Leave Balance Updates** → Automatically deducts approved leave.
6. **Reporting & Payroll Integration** → HR pulls reports and aligns with payroll.

4. Industry-Specific Use Case Analysis

- **IT Services / Consulting:** Project managers need visibility into resource availability for client delivery timelines.
- **Healthcare:** Staffing schedules must ensure minimum workforce coverage, especially during critical shifts.
- **Manufacturing:** Shift supervisors need leave data to maintain production line continuity.
- **Retail:** Store managers need leave tracking to avoid understaffing during peak sales seasons.
- **Education:** Academic institutions require structured leave policies for faculty and staff to avoid academic disruptions.

The Salesforce-based leave tracking app ensures adaptability across industries by allowing configurable policies, custom workflows, and role-based access.

5. AppExchange Exploration

Before building from scratch, exploring **Salesforce AppExchange** provides insights into existing solutions and accelerators:

- **Existing Leave Management Apps:**
  - *Leave Management System (LMS)* – Basic leave request/approval flow.
  - *HRMS Solutions* – Broader HR apps with leave as one module.
  - *Attendance & Absence Trackers* – Focus on time/attendance integrations.
- **Key Learnings from Exploration:**
  - Most apps provide **standard workflows**, but lack **deep customization** for industry-specific policies.
  - Integration with existing Salesforce objects (Users, HR data) is often limited.
  - Many charge additional licensing costs, making a custom solution more costeffective.
- **Decision:** Build a **custom Leave Hub App on Salesforce CRM** with flexibility, while keeping AppExchange apps in mind for potential integrations (e.g., payroll, attendance).