

Process Detailing for Digitalisation of Leave Application Process Demo



Company Name Samuthána Consultancoaching LLP

User Name Dinakar Murthy Krishna

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Key Success Metric(s)

Department/Team	KPI Short Description	KPI Long Description	KPI Unit	KPI Owner(s)	Target Clockspeed
Human Resources	Absenteeism	Absenteeism	Percentage	Samuthána Dinakar (Madinsha@gmail.com)	Month
Human Resources	Approval TAT	Turn Around Time for Approval	Minutes	Samuthána Dinakar Murthy (dinakar@samuthana.com)	Month

Digitalisation Blueprint

Process Step #: Description	Short Field Description	Data Source	Digitalisation Field	Data Usage
1010: Apply Leave	Name	Lookup from the Employee Master and for the Leave Planner Dashboard	Coordinates - Name	Linkage Key / Lookup
1010: Apply Leave	eMail	Auto Fill based on name selection	Coordinates - eMail	Reference
1010: Apply Leave	Mobile	Auto Fill based on name selection	Coordinates - Phone	Reference
1010: Apply Leave	Start Date	Manual Entry of Start Date and for the Leave Planner Dashboard	Date/Time - Date	Formula Field in Form Table Report
1010: Apply Leave	End Date	Manual Entry of End Date and for the Leave Planner Dashboard	Date/Time - Date	Formula Field in Form Table Report
1010: Apply Leave	Duration	Update the Available Leave in Employee Master after Approval	Action - Formula	Processing in Workflow
1010: Apply Leave	Reason	Information for the Approver	Topic - Multi Line	Reference
1010: Apply Leave	Submit Button	Once the user submits validate if the available leave is greater than the duration being applied. If yes, then alert with the information 'You only have XX number of leaves. Please revise your start and end dates' and cancel submit. Otherwise allow the submission.	Action - Submit	Data Integrity
1010: Apply Leave	View Access	Allow access only when the login user id is the same as the applicant or approver user id, as defined in the User Master	Action - Access Filter	Access Filter
1015: Update Notes	Balance Leave	Fetch the actual available leave balance in the Employee Master and populate this notes field as an information for the approver	Reference - Notes	Reference
1020: Approve Leave	Decision	Manual Entry of Decision (Approved, Review, Declined)	Static Dropdown/Radio	Processing in Workflow
1020: Approve Leave	Notes	Notes on from the approver	Topic - Multi Line	Reference

Reference/Standard Files

Business Function	Process Step	Reference/Standard	Reference/Standard File
Any Function	1010: Apply Leave	App Development Steps and Process Detailing	Standard Digitalisation V1.pdf

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