

CERTIFICATION MANAGEMENT APP

PREPARED FOR:

CRM SFDC Training Program

Capgemini Technology Services

PREPARED BY:

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Abstract:

The Certification Management App is a Salesforce application for managing certification process. The aim of this project is to help keep track of employees. Additionally, here the application has 2 kinds of users, which are "App User" and the "App Admin". The App admin is the person who add the Certifications and the Vouchers for them. The job of the App User is to include Employees and make Certification Request for employees, which is additionally reviewed by the App Admin. The application also gives us information about the results of the Certification Exam for each Employee. Apart from this, the app includes Reports and Dashboards which helps us in compiling information more easily. The application likewise use the power of Lightning Web Components for building the UI for the application.

Scopes:

Inscope:

Following is the functionality provided by the application:

There are three categories of people who would access the application : two users which are App User ,App Admin and System administrator. Each of them would have exclusive privileges:

1. The App User:
 - a) Perform CRUD operations on Employee and Certification request objects.
 - b) View custom objects: Certification and Voucher.
 - c) Can pass or fail the employee.
 - d) Reports and Dashboards.
2. The App Admin:
 - a) Perform CRUD operations on Certification and Voucher objects.
 - b) View custom objects: Certification Request and Employee.
 - c) Approve or Reject Certification Request.
 - d) Reports and Dashboards.
3. The System Administrator:
 - a) Creates users: app admin, app user.
 - b) Create profiles for users and controlling privileges.
 - c) Create custom objects Employee, Certification, Voucher and Certification Request.
 - d) Perform CRUD on custom objects.
 - e) Define the workflow and the approval process.
 - f) Can approve or reject the approval processes.

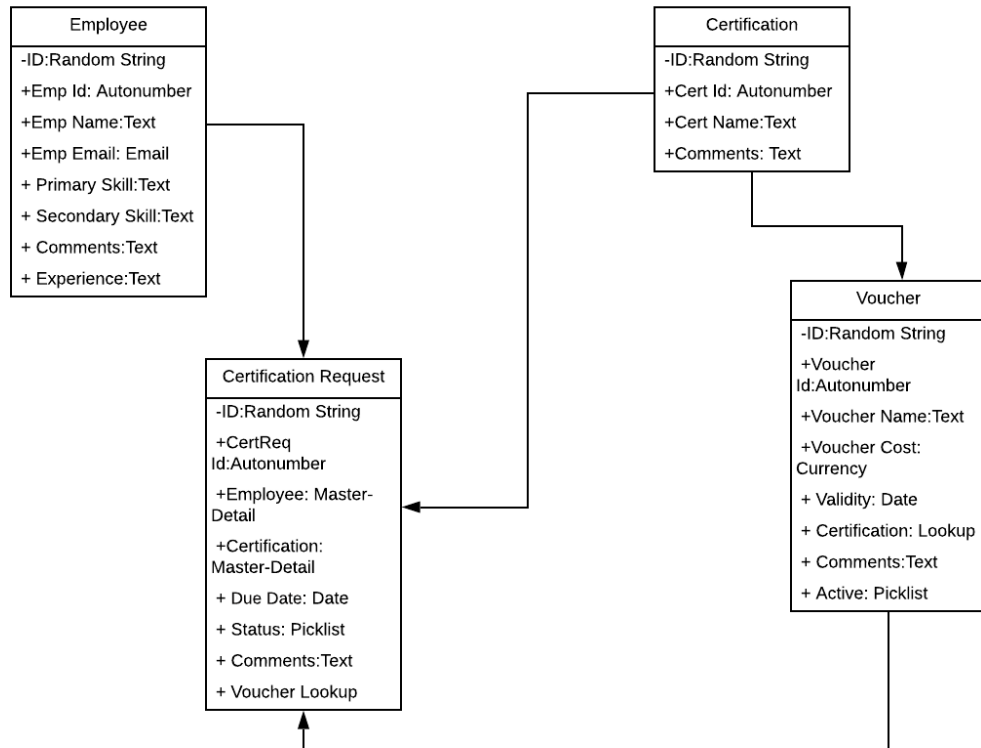
Outscope:

The following functionalities have not been covered under the application:

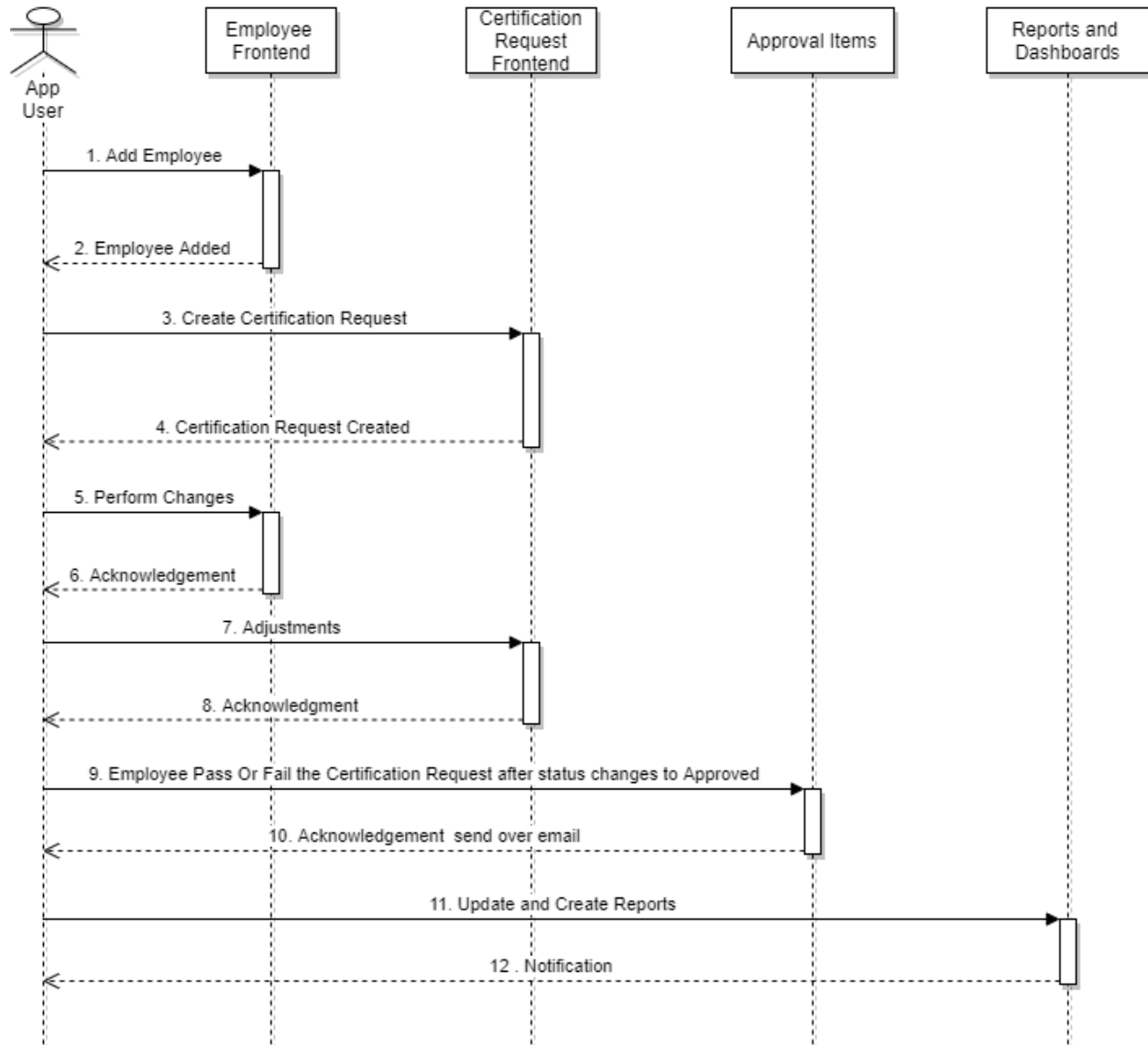
1. The employee can only share his details and see his status on the page
2. The application does not include the Employee login

3. The employee certification registration page is not autonomous.
4. Third Party integrations are not yet included, except for Emails.

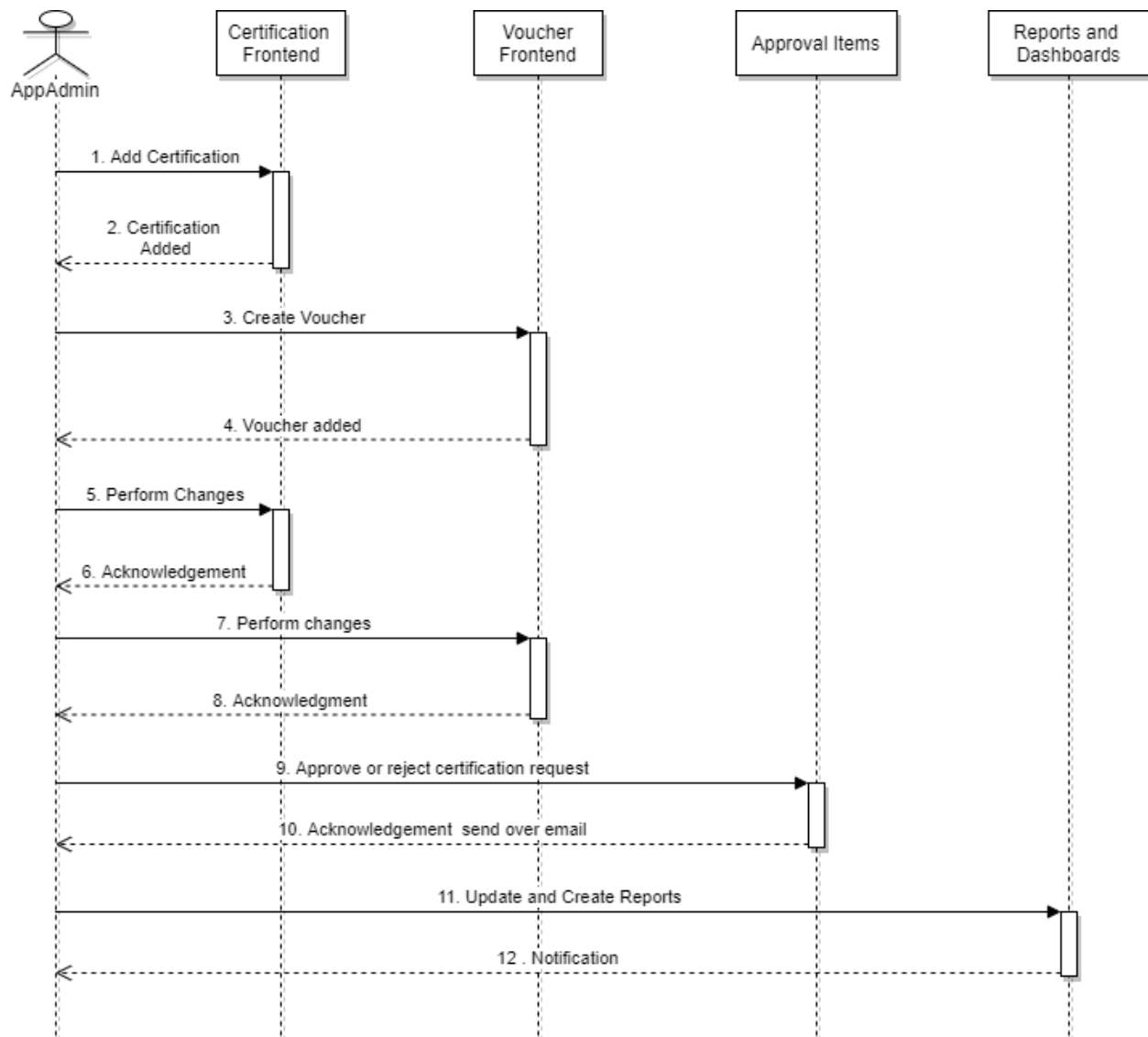
Class Diagram:



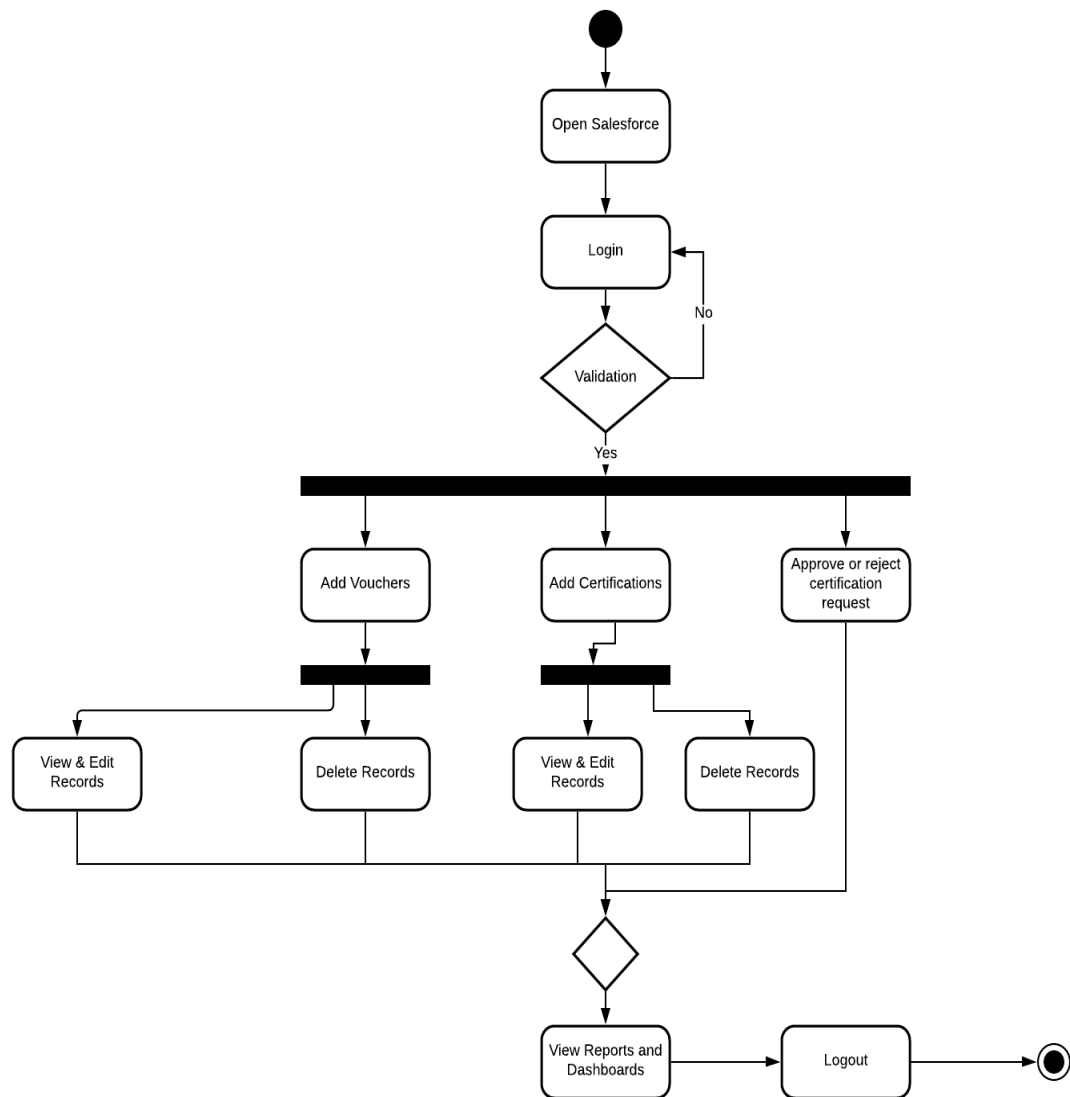
Sequence Diagram for App User:



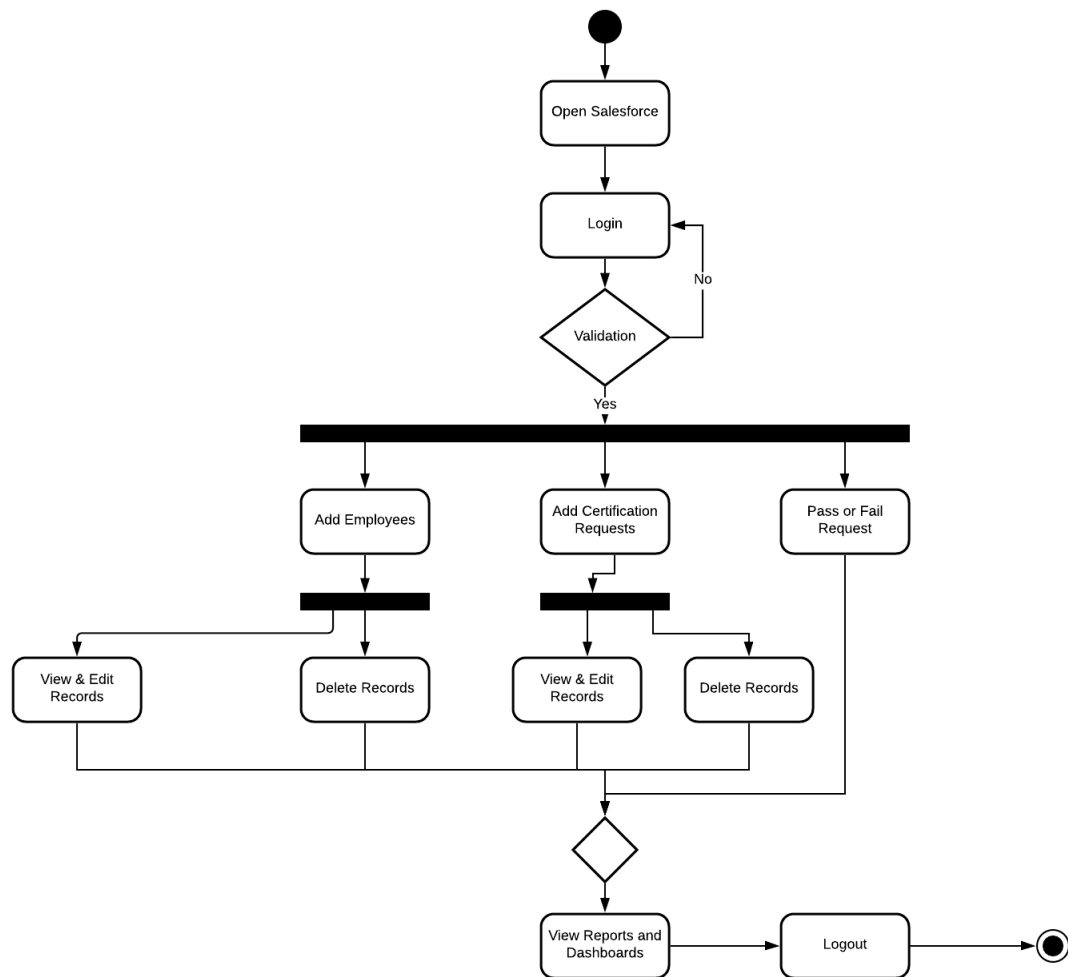
Sequence Diagram for App Admin:



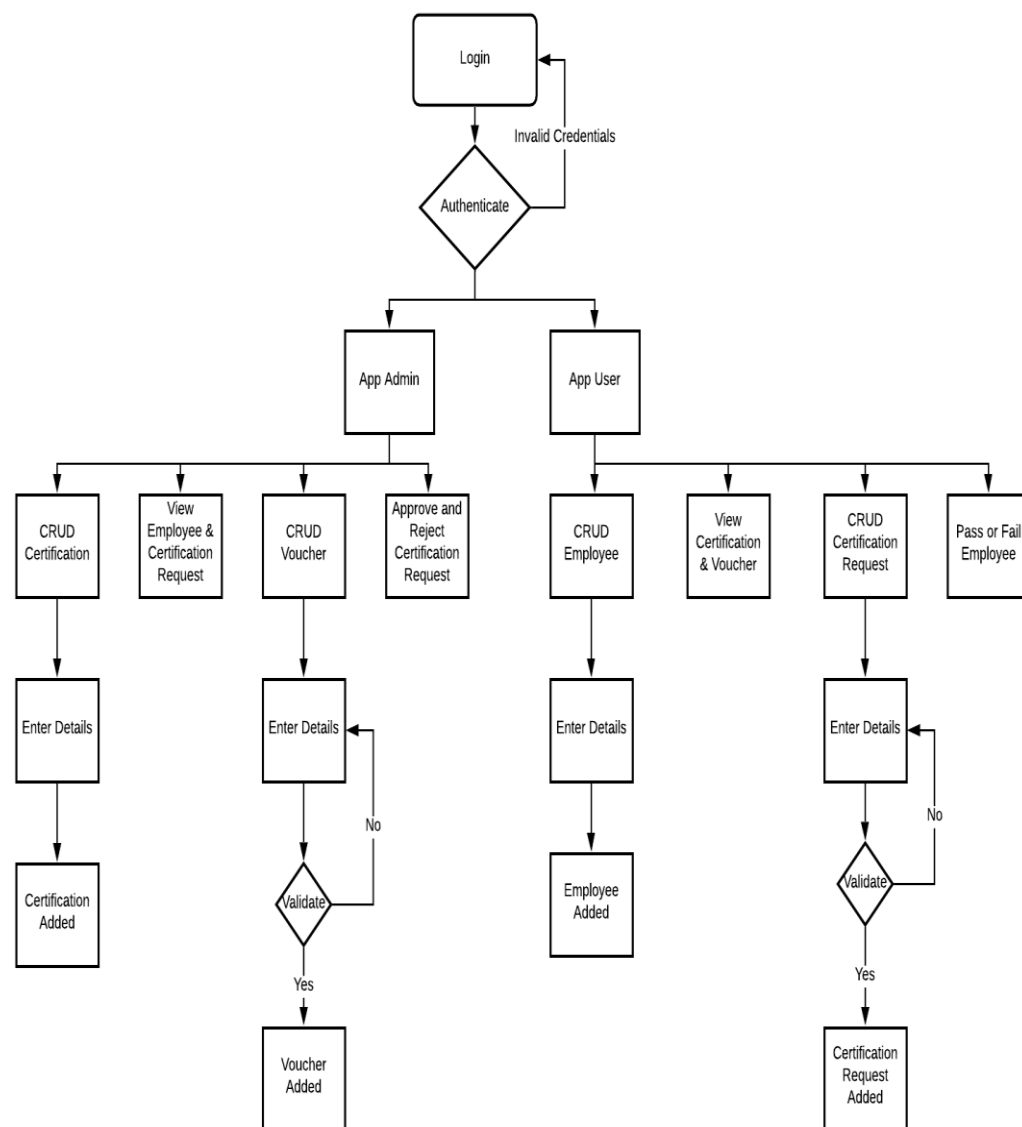
Activity Diagram for Admin:



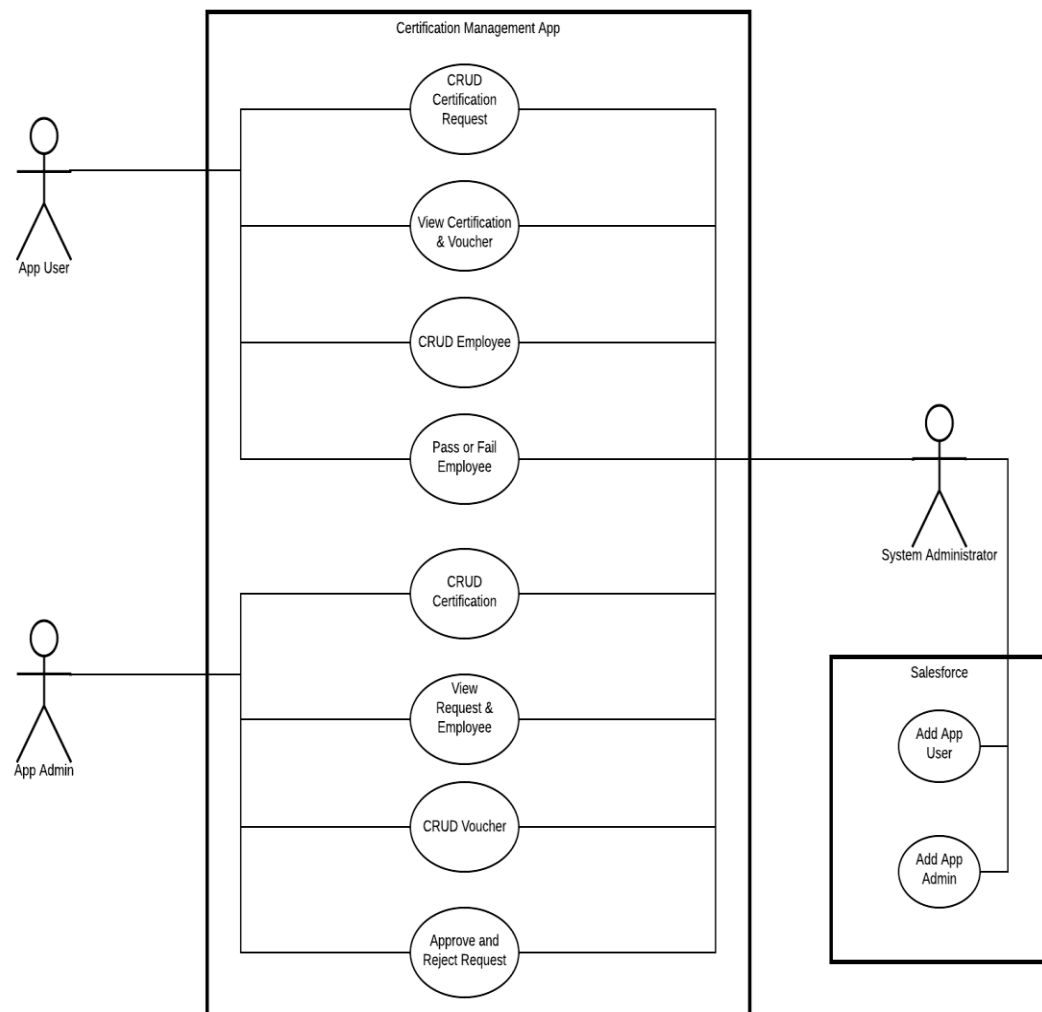
Activity Diagram for User:



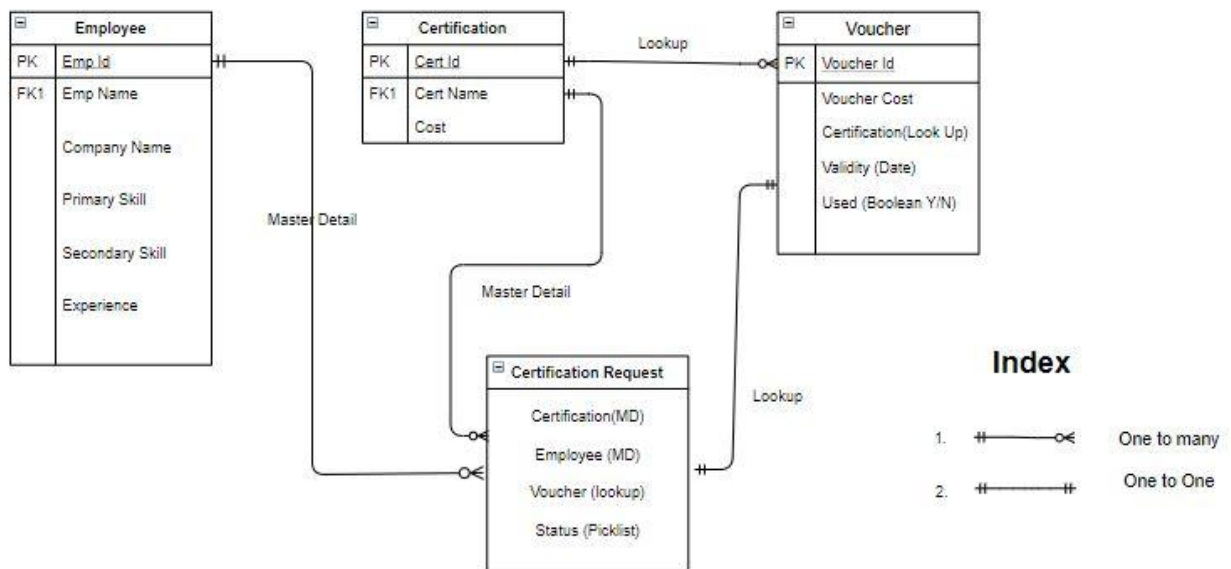
Flow Chart:



Use Case Diagram:



Entity Relation Diagram:



User Interface:

1. Add Employee

The screenshot shows a web application interface for adding a new employee. The top navigation bar includes a Salesforce logo, a search bar, and several menu items: Home, Employees, Certifications, Certifications Request, Vouchers, Reports, and Dashboards. The main content area is titled 'Add Employee' and 'Employee Details'. It features a form with the following fields: Employee Name, Employee Email, Primary Skill, Secondary Skill, Experience, and Comments. A 'Create Employee' button is located at the bottom left of the form.

2. Edit , Delete or View Employees


The screenshot shows the 'Employee Details' section of the application. It displays a table with columns for ID, Name, Email, Primary Skills, Secondary Skills, Experience, and Comments. There are three rows of employee data. A 'Delete' button is visible at the bottom right of the table.

ID	Name	Email	Primary Skills	Secondary Skills	Experience	Comments
1 EMP-0012	Arshdeep	arshdeepjaggi@gmail.com				
2 EMP-0004	Employee	arshdeepkaur_dayalsingh@...	Python	Java	1	
3 EMP-0018	Jaggi	arshdeepjaggi@gmail.com	Java	Python	0	None

3. Add Certification

Add Certification

Certification Details

 Certification

Certification Name


Comments

Add Certification


4. Edit , Delete or View Certifications

Add Certification

Certification Details


 Certification

	<input type="checkbox"/>	ID	▼	Name	▼	Comments	▼
1	<input type="checkbox"/>	CERT-0000		Salesforce De...		No	
2	<input type="checkbox"/>	CERT-0001		Androld Devel...			

Delete 

5. Add Certification Request

[Add Certification Request](#) [Certification Request Details](#)

 **Certification Request**

* Certification

* Employee

Due Date

Comments

Voucher

Status

Email Recipient

6. Edit , Delete or View Certification Requests

Add Certification Request

Certification Request Details


Certification

	<div><input type="checkbox"/></div> Request Id	<div><input type="checkbox"/></div> Certification Name	<div><input type="checkbox"/></div> Employee Name	<div><input type="checkbox"/></div> Voucher Name	<div><input type="checkbox"/></div> Due Date	<div><input type="checkbox"/></div> Comments	<div><input type="checkbox"/></div> Status	<div><input type="checkbox"/></div>
1	<div><input type="checkbox"/></div> CERTREQ-0041	Java Developer	Darpan	JavaVouche	Jun 29, 2020	He	Draft	
				<div>Delete<div></div></div>				

7. Add Voucher

Add Voucher


Voucher Details

 Add an Voucher


* Voucher Name

Voucher Cost


Validity



Active

--None--

Certification




Cancel











Save


8. Edit , Delete or View Vouchers

Add Voucher

Voucher Details

 Voucher

	 Voucher Id	 Voucher Name	 Voucher Cost	 Voucher Validity	 Certification Name	 Active	
1	 V-0011	NewWorld50	₹6,000.00	Sep 29, 2020	Android Developer	NO	
2	 V-0013	Cert4Vouch	₹50,000.00	Aug 29, 2020	Android Developer	NO	
3	 V-0016	JavaVouch	₹6,000.00	Sep 29, 2020	Java Developer	YES	

Delete 

Reports and Dashboard:

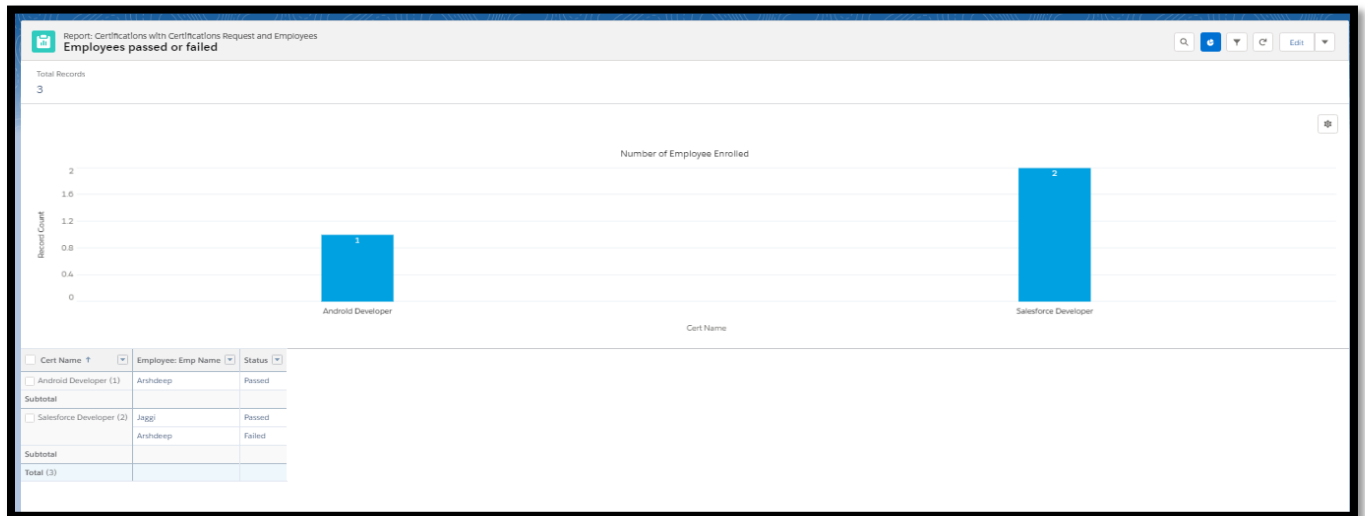
1. Active Vouchers

Report: Vouchers with Certification Active vouchers			
Total Records 3			
	Voucher Name ▾	Active ▾	Certification: Cert Name ▾
1	Salesforce	NO	Salesforce Developer
2	NewWorld50	NO	Androld Developer
3	Cert4Vouch	NO	Androld Developer

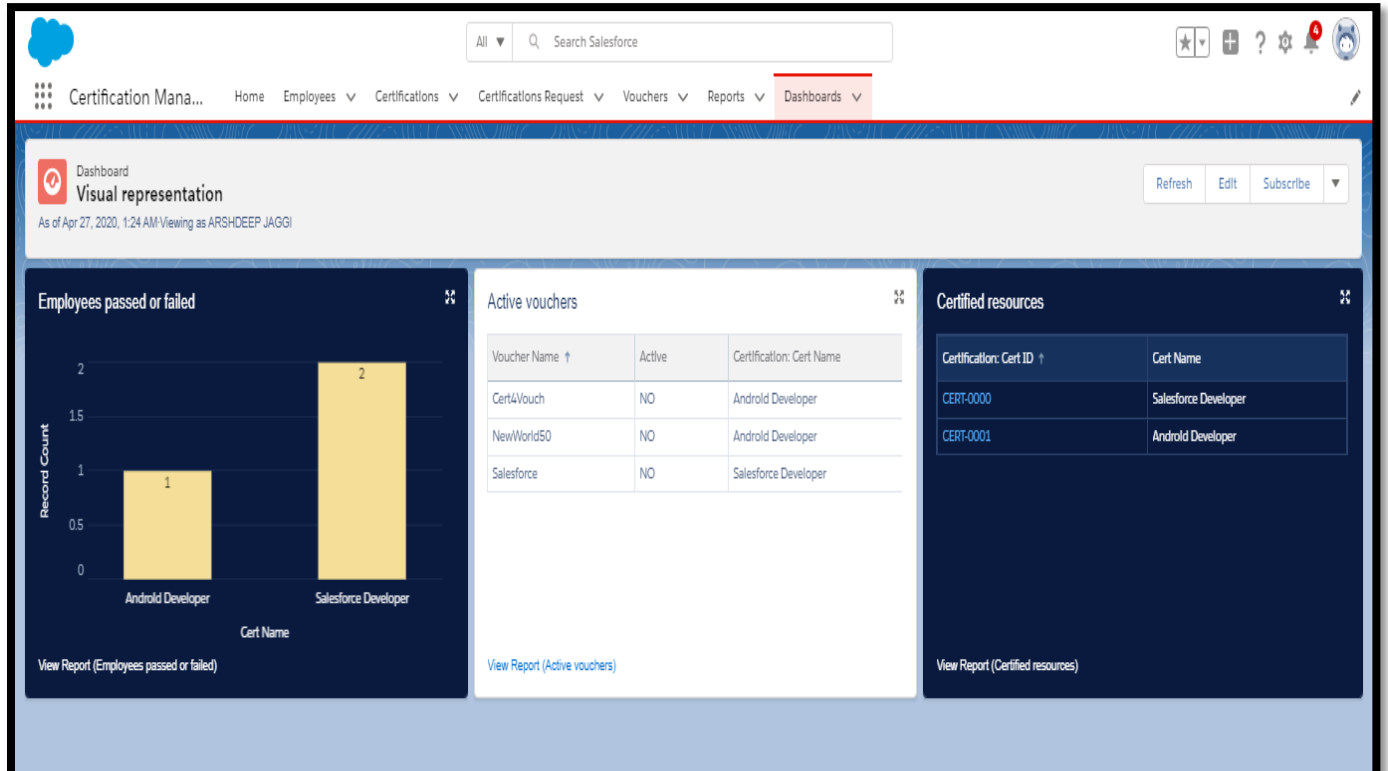
2. Certified Resources

Report: Certifications Certified resources		
Total Records 2		
	Certification: Cert ID ▾	Cert Name ▾
1	CERT-0000	Salesforce Developer
2	CERT-0001	Androld Developer

3. Employees Passed or Failed



4. Dashboard



Object and Fields:

1. **Employee:** This object is used to add data about employee.

Fields:

1. Emp Id: Auto Number
2. Emp Name: Text
3. Primary Skill: Text Area
4. Secondary Skill: Text Area
5. Experience: Text Area
6. Comments: Text Area

Validation Rules:

Triggers:

2. **Certification:** This object is used to add certification details.

Fields:

1. Cert Id: Auto Number
2. Cert Name: Text
3. Comments: Text Area

Validation Rules:

Triggers:

3. **Certification Request:** This object is used to add certification request of an employee.

Fields:

1. CertReq Id: Auto Number
2. Certification - Master-Detail Relationship
3. Employee- Master-Detail Relationship
4. Voucher- Lookup Relationship
5. Due Date: Date

6. Status -Pick list :
 - a) Draft
 - b) Approved
 - c) Rejected
 - d) Passed
 - e) Failed
7. Comments: Text Area

Validation Rules:

1. Same Voucher & Certification: used to match that voucher being applied is for correct certification.

Triggers:

1. Employee Duplicate : Checks if the certification request for the employee already exists.
2. Check Duplicates: Checks that the same certification and voucher details cannot be used again.
3. Automatically assign voucher: Is used to automatically assign voucher to a certification if certification is approved and voucher is not applied.

4. Voucher: This object is used to add voucher details.

Fields:

1. Voucher Id: Auto Number
2. Voucher Name: Text
3. Voucher Cost: Text Area
4. Certification : Lookup Relationship
5. Validity: Date
6. Active: Pick list
 - a) Yes
 - b) No
7. Comments: Text Area

Validation Rules:

1. Name rule: Voucher Name should be exact 10 characters.
2. Validity rule: Voucher validity validation.

Triggers:

Flow:

1. Employee mails the app user to issue certification voucher.
2. App User raises the certification request to the App Admin who in turn approves or rejects the request. The request is raised using Approval Process tool of salesforce. The Approval Process is fired as soon as a request is created.
3. The Employee is notified when request is submitted by the App User via email.
4. The App Admin also receives a email when a request is raised.
5. If the App Admin approves the request, then, the employee and the App User receives a mail to tell them about the approval.
6. The voucher will assigned to the user when request is approved.
7. If the App Admin rejects the request, then, the employee and the App User receives a mail to tell them about the rejection.
8. The App Admin will provide some comments if the request is rejected.
9. The employee will notify the App User about the status of certification after the request is approved.
10. The App User will then change the request status to Passed/Failed based on the information provided by the employee.
11. In case due date of request is passed and request is still not approved or rejected, then, the employee and the app user will receive a mail to notify them to update the status of request.

Assumptions:

However, we have made a few assumptions with respect to the application, which are:

1. App admin and app user are two different users. It is system administrator who is performing the task assigned to app admin in order to avoid separate login during approval process.
2. Certification Request Status is changed to assigned only when it is approved not when voucher is assigned to the request.
3. Employee shares the status of the certification request with app user to get the status changed over email.