

## Project Files

Date	25 JUNE 2025
Team ID	LTVIP2025TMID29797
Project Name	workforce administration solution (dev)
Maximum Marks	

In a Salesforce-based development project, "executable files" refer to the metadata components, configurations, and custom code (Apex, LWC, Flows, etc.) that make up the deployable and runnable solution within the Salesforce ecosystem. These components collectively form the Workforce Administration Solution and are stored as project files in a Salesforce DX (SFDX) structure.

### A.Custom Salesforce object:

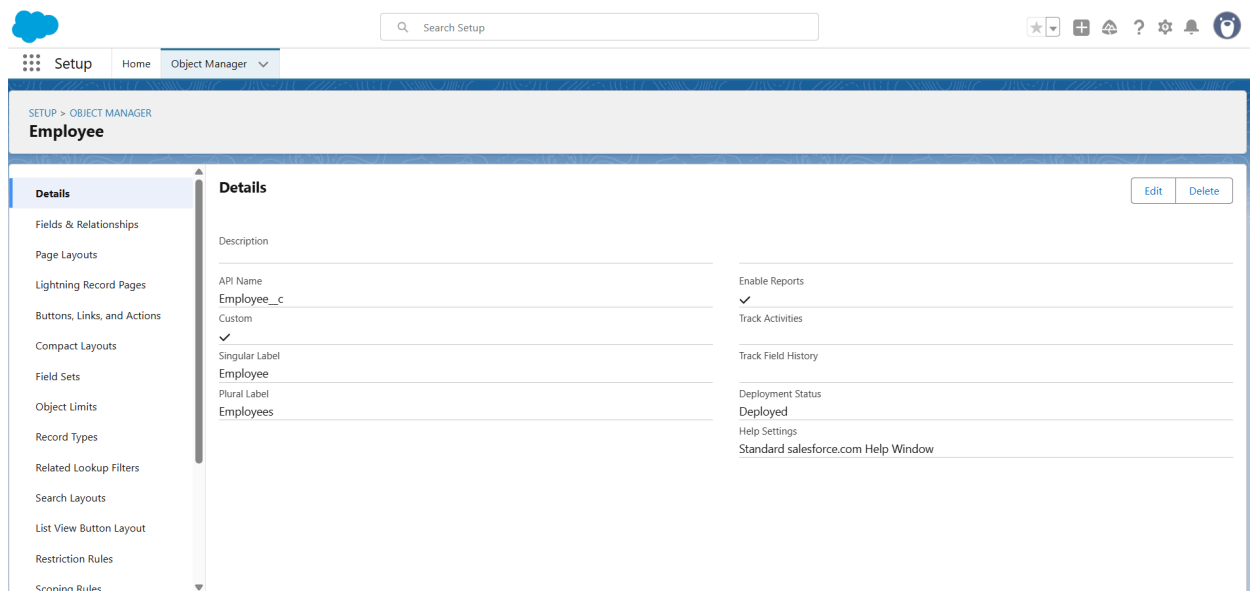
We have created employee object with the formate

1.Record Name : Employee ID

2.Data Type : Auto Number

3.Display Format : EMS-{0000}

4.Starting Number : 1



**Similarly:** ProjectTask, Asset, Asset Service

- **Project Task :**

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

ProjectTask

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Details

Description

API Name

ProjectTask\_c

Custom

✓

Singular Label

ProjectTask

Plural Label

ProjectTasks

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

- **Asset:**

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Asset

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

Details

Description

API Name

Asset\_c

Custom

✓

Singular Label

Asset

Plural Label

Assets

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

- **Asset Service :**

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, Home, and Object Manager. A search bar is present. The left sidebar shows the Setup menu with Object Manager selected. The main content area is titled 'SETUP > OBJECT MANAGER Asset Service'. It features a 'Details' section with a left-hand navigation pane listing various configuration options like Fields & Relationships, Page Layouts, etc. The main pane shows the 'Details' for the 'Asset Service' object, including fields like API Name (Asset\_Service\_c), Custom (checked), Singular Label (Asset Service), Plural Label (Asset Services), and Deployment Status (Deployed). There are 'Edit' and 'Delete' buttons in the top right of the details pane.

## B.CustomTabs and App

- **Tabs for each object**

The screenshot shows the Salesforce Setup interface for 'Custom Tabs'. The top navigation bar is the same as the previous screenshot. The left sidebar shows the 'User Interface' section with 'Custom Tabs' selected. The main content area is titled 'SETUP Tabs Custom Tabs'. It includes a 'Help for this Page' link. Below the title, there is a paragraph explaining that custom tabs can be used to extend Salesforce functionality. A table titled 'Custom Object Tabs' lists several tabs: Assets, Asset Services, Employees, Leaves, Projects, and ProjectTasks. Each tab has a 'Tab Style' (Globe, Computer, Bell, Airplane, Car, Books) and a 'Description' field. Below the table, there are sections for 'Web Tabs' and 'Visualforce Tabs', both of which currently show 'No Web Tabs have been defined' and 'No Visualforce Tabs have been defined' respectively. There are 'New' and 'What Is This?' links for each section.

Action	Label	Tab Style	Description
Edit   Del	Assets	Globe	
Edit   Del	Asset Services	Computer	
Edit   Del	Employees	Bell	
Edit   Del	Leaves	Airplane	
Edit   Del	Projects	Car	
Edit   Del	ProjectTasks	Books	

## C. Fields and relationships:

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar labeled 'Search Setup', and several utility icons. Below the navigation bar, the 'Setup' menu is open, showing 'Home' and 'Object Manager'. The 'Object Manager' page is selected, displaying the 'Employee' object. The left sidebar contains a list of configuration options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Sharing Rules. The main content area is titled 'Fields & Relationships' and shows '26 Items, Sorted by Field Label'. A table lists the fields for the Employee object, including their names, API names, and data types. The fields listed are: Employee ID (Auto Number), Employee Name (Text(18)), Experience (Text Area(255)), Food Allowance Amount (Currency(18, 0)), Food Allowances (Checkbox), Gender (Picklist), Joining date (Date), Last Modified By (Lookup(User)), and LinkedIn Profile (URL(255)).

Field Name	API Name	Data Type
Employee ID		Auto Number
Employee Name	Employee_Name__c	Text(18)
Experience	Experience__c	Text Area(255)
Food Allowance Amount	Food_Allowance_Amount__c	Currency(18, 0)
Food Allowances	Food_Allowances__c	Checkbox
Gender	Gender__c	Picklist
Joining date	Joining_date__c	Date
Last Modified By	LastModifiedById	Lookup(User)
LinkedIn Profile	LinkedIn_Profile__c	URL(255)

As we can see employee name field in employee object similarly for ProjectTask, Asset, Asset Service- objects

## D. Import Data :

With given URL link of CSV file <https://tinyurl.com/SF-Employee-Data>

Batches												
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
<a href="#">View Request</a>	<a href="#">View Result</a>	751gL000004I5YG	6/21/2025, 4:19 AM	6/21/2025, 4:19 AM	133	87	0	14	0	0		Completed

Verified that your data has been imported under batches.

## E.Roles:

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The left sidebar contains navigation links for Users, Roles, Feature Settings, Sales, Service, and Case Teams. The main content area displays 'Your Organization's Role Hierarchy' for 'Ideal Institute Of Technology'. The hierarchy is a tree structure starting with 'Ideal Institute Of Technology' at the top, followed by 'CEO', 'CFO', 'COO', 'HR', 'Manager', 'On Site Employee', 'Remote Employee', 'SVP Customer Service & Support', 'Customer Support International', 'Customer Support North America', 'Installation & Repair Services', and 'SVP Human Resources'. Each role in the hierarchy has an 'Add Role' link next to it. The 'Show in tree view' button is visible in the top right corner of the hierarchy section.

Creating HR Role, Manager, On Site Employee, Remote Employee.

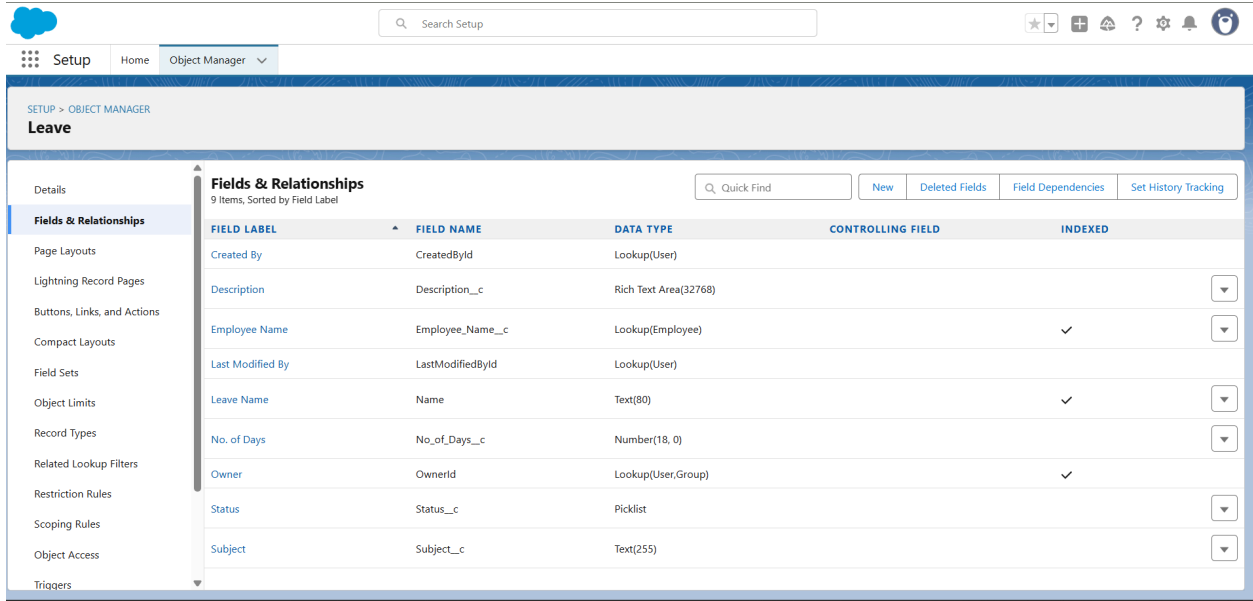
## F. Users:

### Creating users

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area displays 'All Users' with a table of user information. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists 10 users, including Chatter Expert, EPIC\_OrgFarm, Mikaelson\_Kol, Mikaelson\_Niklaus, Team\_Buela\_Sindhu, thirumalasethy\_Sindhu, thirumalasethy\_Sindhu, User\_Integration, and User\_Security. The 'View' dropdown is set to 'All Users' and the 'Create New View' button is visible. The 'Help for this Page' link is in the top right corner.

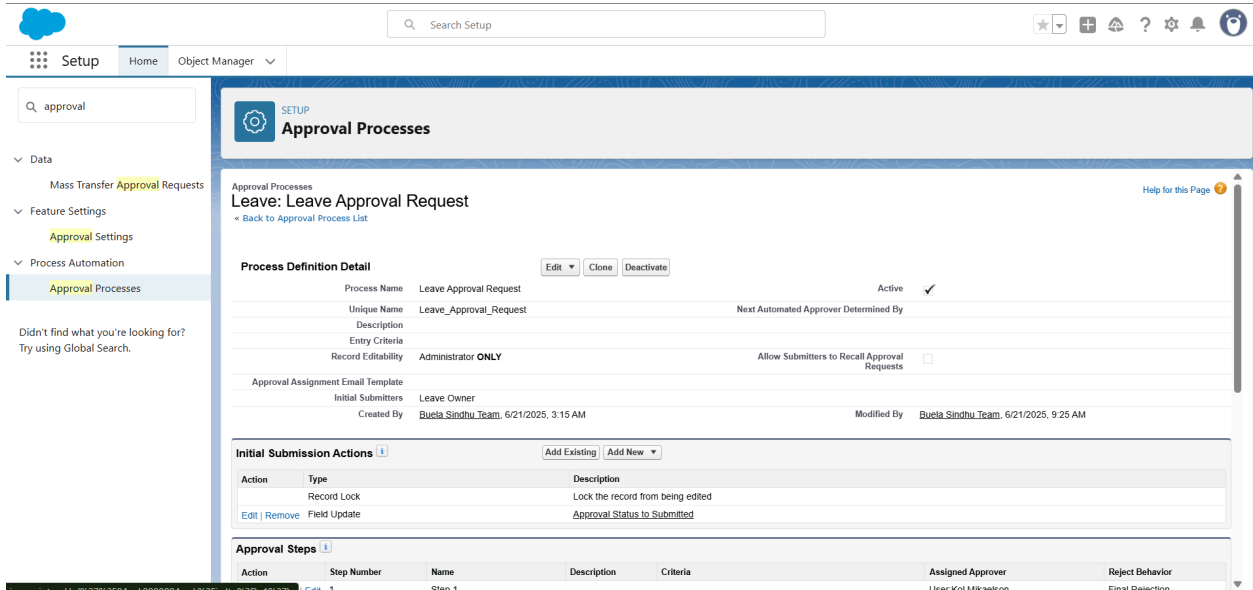
Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.009g000005hvsxuaw.grnnybdrf32@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	EPIC_OrgFarm	OEPIK	epic.268ece3e9885@orgfarm.com		✓	System Administrator
<a href="#">Edit</a>	Mikaelson_Kol	kmika	thirumalasethisindhu@gmail.com	Manager	✓	Manager
<a href="#">Edit</a>	Mikaelson_Niklaus	nmika	226k1a4210@idealttech.edu.in	HR	✓	HR
<a href="#">Edit</a>	Team_Buela_Sindhu	226	226k1a4210180@agentforce.com		✓	System Administrator
<a href="#">Edit</a>	thirumalasethy_Sindhu	sthir	thirumalasethy@gmail.com	Manager	✓	Solution Manager
<a href="#">Edit</a>	User_Integration	integ	integration@009g00000005hvsxuaw.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightssecurity@009g00000005hvsxuaw.com		✓	Analytics Cloud Security User

## G.Approval process:



This screenshot shows the 'Fields & Relationships' page for the 'Leave' object in Salesforce Setup. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and Triggers. The main content area displays a table of fields with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. A 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking' are at the top right.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Description	Description__c	Rich Text Area(32768)		
Employee Name	Employee_Name__c	Lookup(Employee)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Leave Name	Name	Text(80)		✓
No. of Days	No_of_Days__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Status	Status__c	Picklist		
Subject	Subject__c	Text(255)		



This screenshot shows the 'Approval Processes' page for the 'Leave: Leave Approval Request' process in Salesforce Setup. The left sidebar shows a search for 'approval' and a list of related items. The main content area displays the 'Process Definition Detail' for the 'Leave Approval Request' process, including fields for Process Name, Unique Name, Description, Entry Criteria, Record Editability, Approval Assignment Email Template, Initial Submitters, and Created By. Below this, there are sections for 'Initial Submission Actions' and 'Approval Steps'.

**Process Definition Detail**

Field	Value
Process Name	Leave Approval Request
Unique Name	Leave_Approval_Request
Description	
Entry Criteria	
Record Editability	Administrator ONLY
Approval Assignment Email Template	
Initial Submitters	Leave Owner
Created By	Buela Sindhu Team, 6/21/2025, 3:15 AM

**Initial Submission Actions**

Action	Type	Description
Record Lock		Lock the record from being edited
Field Update		Approval Status to Submitted

**Approval Steps**

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
	1	Step 1			J. Kari Mikaelson	Final Rejection

Setup Home Object Manager

Search Setup

approval

Data

Mass Transfer Approval Requests

Feature Settings

Approval Settings

Process Automation

Approval Processes

Didn't find what you're looking for? Try using Global Search.

## Approval Processes

### Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions   Edit	1	Step 1			User Kol Mikaelson	Final Rejection
Show Actions   Edit	2	Approval from HR		Leave: No. of Days EQUALS 5	User Niklaus Mikaelson	Final Rejection

### Final Approval Actions

Add Existing Add New

Action	Type	Description
Edit   Remove	Record Lock	Lock the record from being edited
Edit   Remove	Email Alert	Email Alert - Leave Approved
Edit   Remove	Field Update	Approval Status to Approved

### Final Rejection Actions

Add Existing Add New

Action	Type	Description
Edit   Remove	Record Lock	Unlock the record for editing
Edit   Remove	Field Update	Approval Status to Rejected
Edit   Remove	Email Alert	Email Alert - Leave Rejected

### Recall Actions

Add Existing Add New

Action	Type	Description
	Record Lock	Unlock the record for editing

## H. Apex Trigger: EmpInsert.apxt

```

File Edit Debug Test Workspace Help < >
EmpInsert.apxt
Code Coverage: None API Version: 64
1 trigger EmpInsert on Employee__c (before insert) {
2
3     for(Employee__c pass : Trigger.New){
4
5         List<Employee__c> mynew = [SELECT Id, Name FROM Employee__c WHERE Employee_Name__c =: pass.Employee_Name__c];
6
7         if(mynew.size() > 0){
8
9             pass.Name.addError('Employee with same name is existing');
10
11         }
12     }
13 }
14

```

**I. Testing the Trigger:** For Activity 1 and try to create a record with the existing Employee Name say "Jackie Chan"

**New Employee: On Site Employee**

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**Information**

Employee ID	Owner demo project
Employee Name Jackie Chan	Reports to Search Employees...
Gender --None--	Qualification
Experience	Phone no
Email	Mode of Work None--
Joining date	n Time
LinkedIn Profile	ut Time

**We hit a snag.**

**Review the errors on this page.**

- Employee with same name is existing

**Review the following fields**

- [Employee ID](#)

Leave Days

Cancel

Save & New

Save