

WORKFORCE ADMINISTRATION SOLUTION

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ABB03DFB9E4A14EB9A84CD29A271E456
6029BF20B3CD240B29E4487A8C47E6A3
802FE9AAC3E7706A3C54A86CF11296AB

Project Overview:

The Workforce Administration Solution aims to streamline and optimize the management of human resources across an organization. This includes automating key HR processes, enhancing employee lifecycle management, and improving compliance, reporting, and decision-making through advanced tools and analytics.

Objectives:

Design and implement a comprehensive workforce administration solution to streamline and automate HR-related processes, enhance employee experience, and improve organizational efficiency.

Salesforce Key Features and Concepts Utilized.

➤ Custom Objects & Fields:

Custom objects are data structures created to store information that doesn't fit into standard objects provided by the system. For workforce administration, like employee object, Asset object and Asset Service object.

➤ Page Layouts & Lightning Apps:

When implementing page layouts and Lightning apps in a workforce administration solution, particularly in platforms like Salesforce, these features enhance user experience, streamline workflows, and ensure efficient data management.

➤ Apex Triggers & Classes:

Apex Triggers and classes in Salesforce can play a significant role in automating and enhancing workforce administration processes.

➤ Setting OWD :

Organization-Wide Defaults (OWD) in a workforce administration solution determine the baseline level of access users have to records they don't explicitly own. In platforms like Salesforce, OWD settings are a key component of security and access control for objects such as Employee Records, Leave Requests, or Shift Schedules.

➤ Reports & Dashboards:

Reports and Dashboards in a workforce administration solution are essential for monitoring workforce metrics, analyzing trends, and making data-driven decisions.

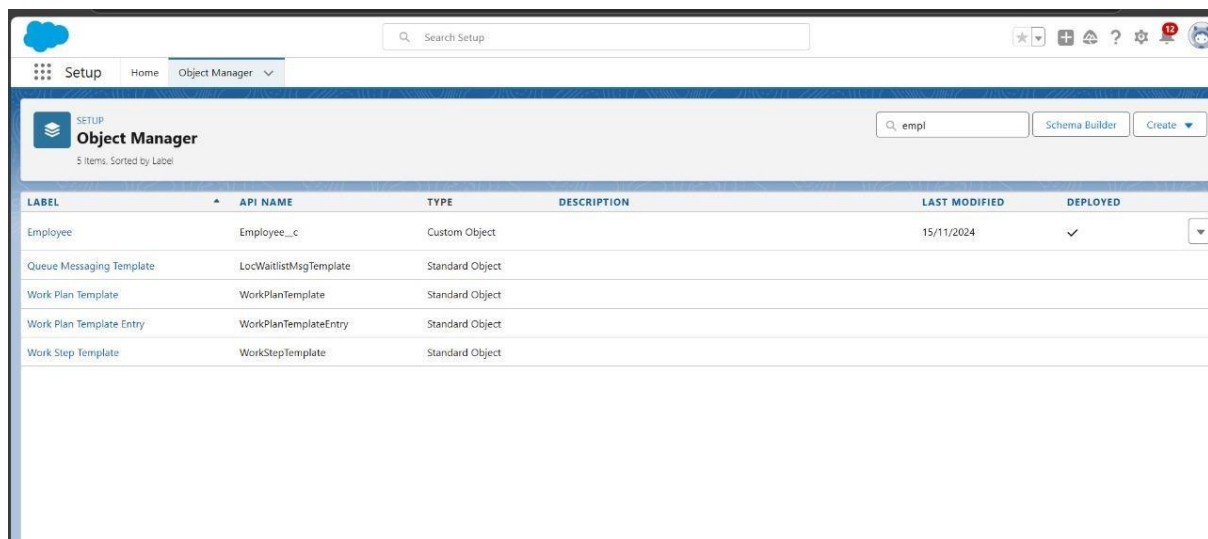
➤ Approval Process:

An Approval Process in a workforce administration solution automates record approval workflows, ensuring accountability, compliance, and efficiency. Platforms like Salesforce allow for creating robust approval processes to handle common workforce tasks, such as leave requests, shift changes, or performance reviews.

Detailed Steps to Solution Design for Workforce Administration solution in salesforce:

➤ Employee object:

An employee custom object is to keep track the employee activities and their individuals and as well as team progress.

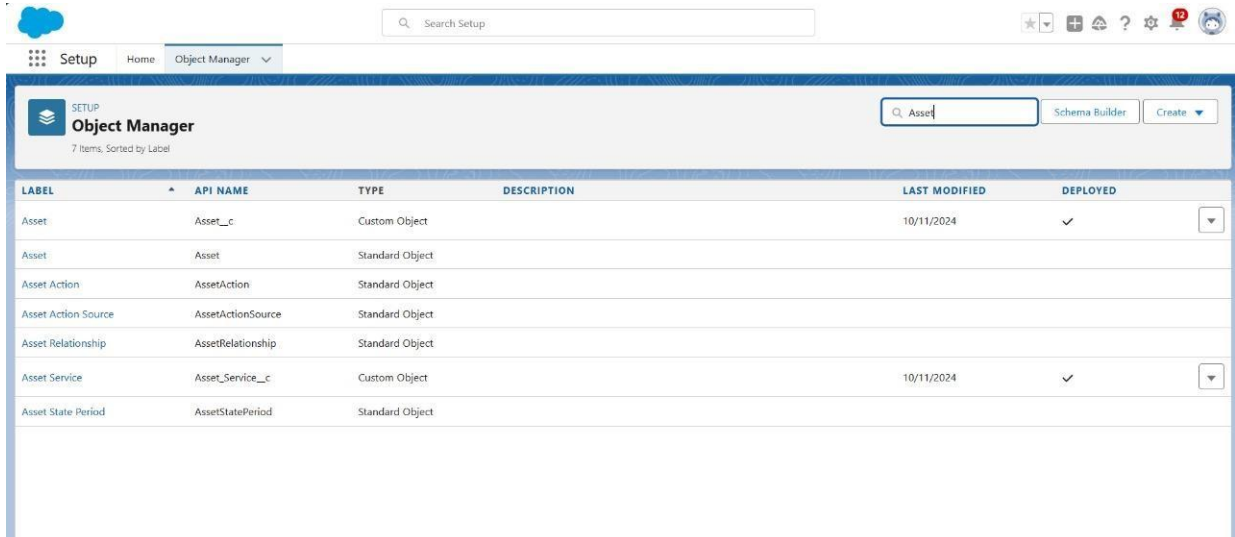


The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main header area displays 'Object Manager' with a search bar containing 'empl', a 'Schema Builder' button, and a 'Create' dropdown. Below this is a table listing objects. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The first row shows 'Employee' as a Custom Object, last modified on 15/11/2024, and deployed. The other rows show standard objects: 'Queue Messaging Template', 'Work Plan Template', 'Work Plan Template Entry', and 'Work Step Template'.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Employee	Employee__c	Custom Object		15/11/2024	✓
Queue Messaging Template	LocWaitlistMsgTemplate	Standard Object			
Work Plan Template	WorkPlanTemplate	Standard Object			
Work Plan Template Entry	WorkPlanTemplateEntry	Standard Object			
Work Step Template	WorkStepTemplate	Standard Object			

➤ Asset Object & Asset Service object:

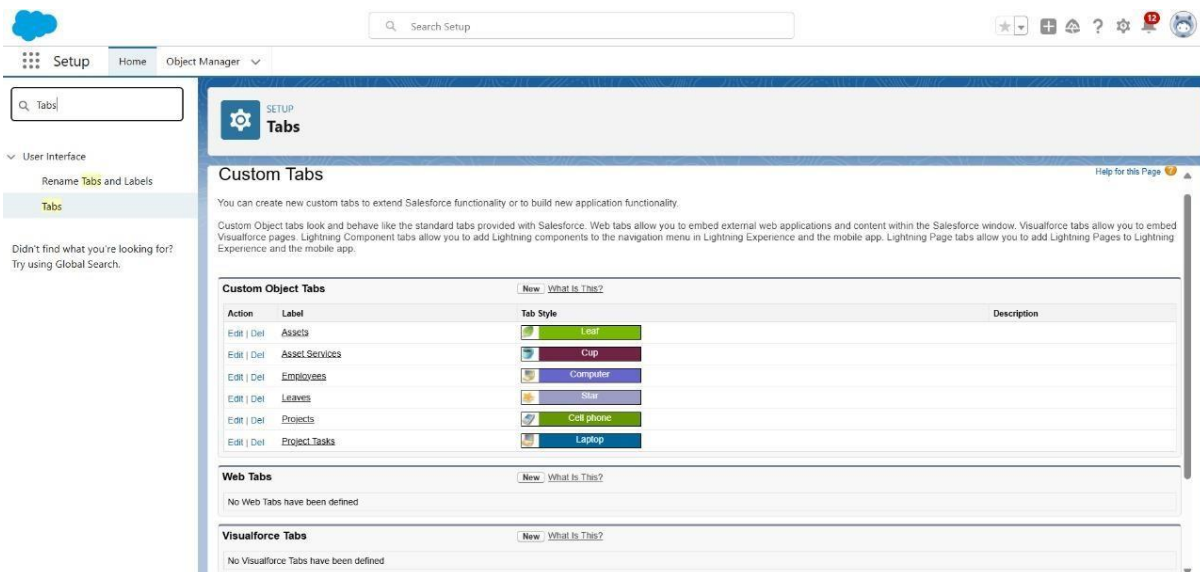
Use “Text” as a data type and label Record Name as “Project Task Name”.



LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Asset	Asset__c	Custom Object		10/11/2024	✓
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Asset Service	Asset_Service__c	Custom Object		10/11/2024	✓
Asset State Period	AssetStatePeriod	Standard Object			

➤ Creating Custom Tab:

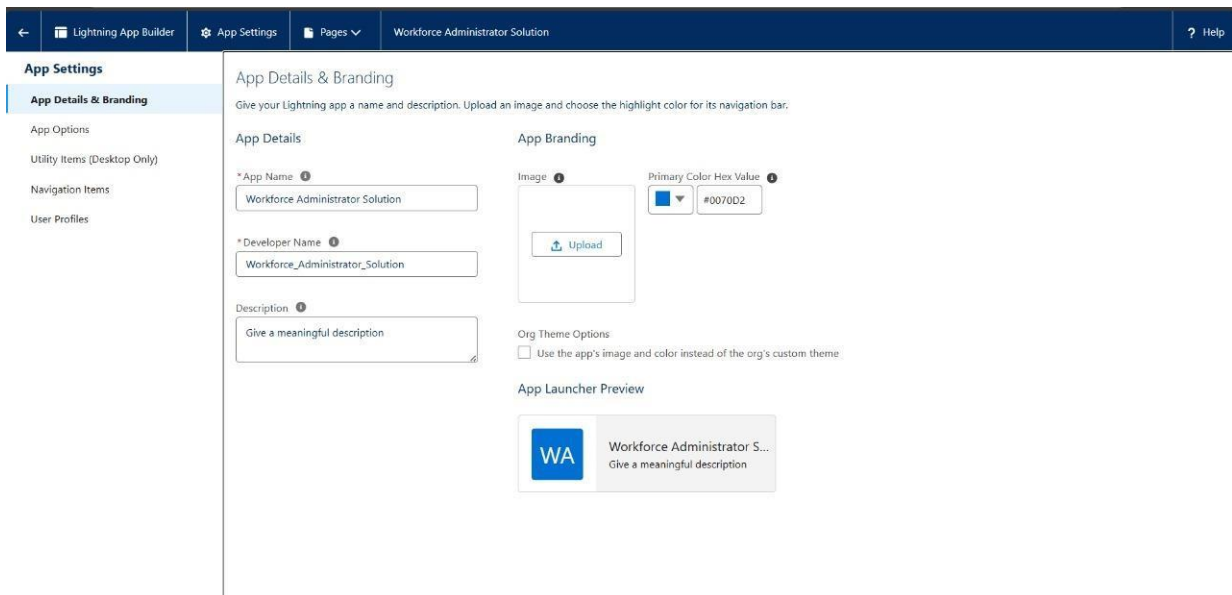
A customer tab is a user-defined tab that displays custom objects, employee, Asset, Asset service within the Salesforce interface.



Action	Label	Tab Style	Description
Edit Del	Assets	Leaf	
Edit Del	Asset Services	Cup	
Edit Del	Employees	Computer	
Edit Del	Leaves	Star	
Edit Del	Projects	Cell phone	
Edit Del	Project Tasks	Laptop	

➤ Lightning App:

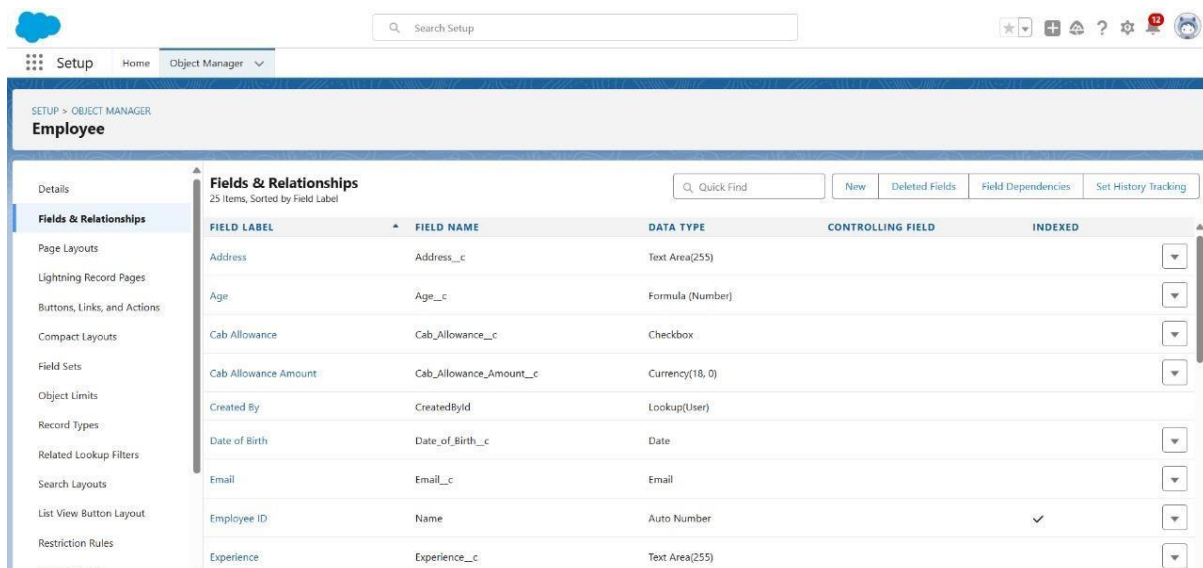
- Create a Custom Lightning App that integrates the following components.
 - Employee records.
 - Asset record.
 - Asset service



The screenshot shows the 'App Settings' tab in the Lightning App Builder. The 'App Details & Branding' section is active, showing fields for App Name, Developer Name, and Description. The App Name is 'Workforce Administrator Solution'. The Developer Name is 'Workforce_Administrator_Solution'. The Description is 'Give a meaningful description'. The App Branding section shows an image upload button and a Primary Color Hex Value of '#007002'. The Org Theme Options section has a checkbox for 'Use the app's image and color instead of the org's custom theme'. The App Launcher Preview shows a 'WA' icon and the text 'Workforce Administrator S...' and 'Give a meaningful description'.

➤ Creating Fields & Relationships:

Fields represent the data stored in the columns of a relational database. It can hold any valuable information that you require for a specific object. Hence overall searching, deletion, and editing of the records become simpler and quicker.

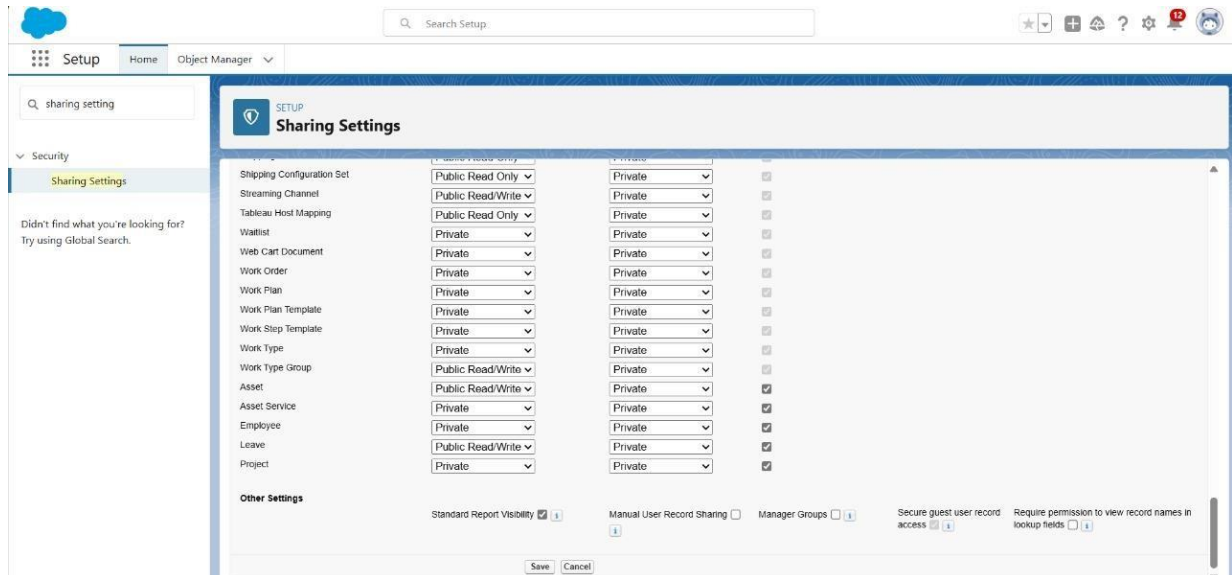


The screenshot shows the 'Setup' page in Salesforce, specifically the 'Object Manager' section for the 'Employee' object. The 'Fields & Relationships' section is active, showing a list of fields and their relationships. The table below represents the data shown in the screenshot.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Age	Age__c	Formula (Number)		
Cab Allowance	Cab_Allowance__c	Checkbox		
Cab Allowance Amount	Cab_Allowance_Amount__c	Currency(18, 0)		
Created By	CreatedById	Lookup(User)		
Date of Birth	Date_of_Birth__c	Date		
Email	Email__c	Email		
Employee ID	Name	Auto Number		✓
Experience	Experience__c	Text Area(255)		

➤ Creating OWD Setting:

To ensue data privacy and compliance with regulations, need to restrict access to sensitive customer information using OWD.

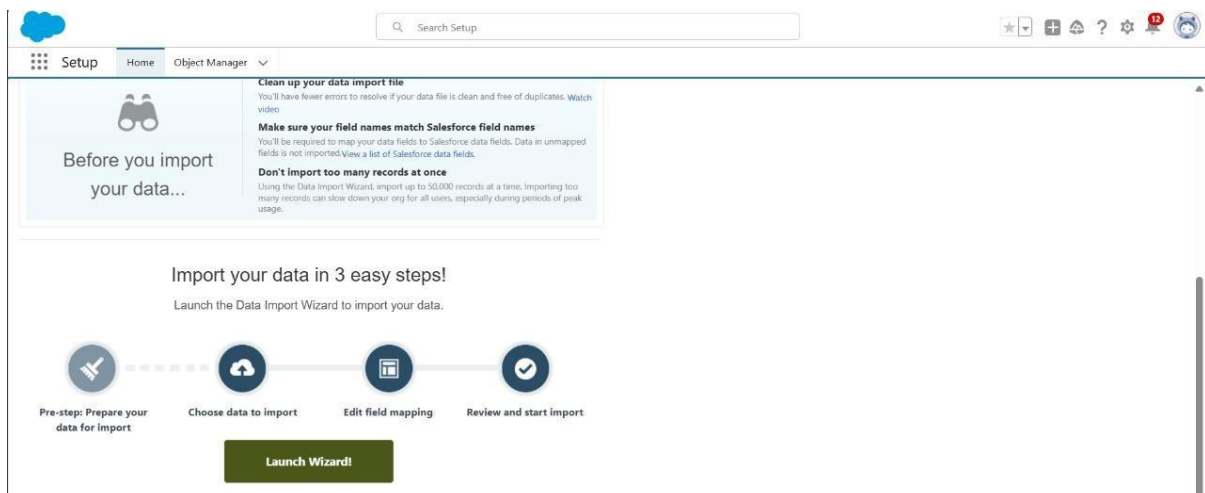


The screenshot shows the Salesforce Setup interface with the 'Sharing Settings' page open. The left sidebar shows the 'Setup' menu with 'Security' expanded and 'Sharing Settings' selected. The main content area displays a table of sharing settings for various objects. The table has columns for the object name, 'Sharing Model', 'Default Sharing Method', and 'Default Sharing Method (Legacy)'. The objects listed include Shipping Configuration Set, Streaming Channel, Tableau Host Mapping, Waitlist, Web Cart Document, Work Order, Work Plan, Work Plan Template, Work Step Template, Work Type, Work Type Group, Asset, Asset Service, Employee, Leave, and Project. The sharing models are set to 'Public Read Only', 'Public Read/Write', or 'Private'. The default sharing methods are set to 'Private' or 'Public Read/Write'. At the bottom, there are checkboxes for 'Standard Report Visibility', 'Manual User Record Sharing', 'Manager Groups', 'Secure guest user record access', and 'Require permission to view record names in lookup fields'. A 'Save' button is at the bottom right.


Object	Sharing Model	Default Sharing Method	Default Sharing Method (Legacy)
Shipping Configuration Set	Public Read Only	Private	
Streaming Channel	Public Read/Write	Private	
Tableau Host Mapping	Public Read Only	Private	
Waitlist	Private	Private	
Web Cart Document	Private	Private	
Work Order	Private	Private	
Work Plan	Private	Private	
Work Plan Template	Private	Private	
Work Step Template	Private	Private	
Work Type	Private	Private	
Work Type Group	Public Read/Write	Private	
Asset	Public Read/Write	Private	
Asset Service	Private	Private	
Employee	Private	Private	
Leave	Public Read/Write	Private	
Project	Private	Private	

➤ Importing Data Using Data Wizard:

Upload data from external sources and combine it with data you collect via Analytics . The data import Wizard is a Tool makes it easy to import data from many standard salesforce objects including accounts, contacts, leads, solutions, campaign members, and person accounts.



The screenshot shows the Salesforce Data Import Wizard page. The top section has a heading 'Before you import your data...' with three key points: 'Clean up your data import file', 'Make sure your field names match Salesforce field names', and 'Don't import too many records at once'. Below this, it says 'Import your data in 3 easy steps!' and 'Launch the Data Import Wizard to import your data.' The steps are: 'Pre-step: Prepare your data for import', 'Choose data to import', 'Edit field mapping', and 'Review and start import'. A 'Launch Wizard!' button is at the bottom.




Setup Home Object Manager

Data Import Wizard Help for this page

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Employee	14	0	0	11-10-2024 02:29	112
Open	Employee	0	0	0	11-10-2024 01:42	0
Open	Employee	0	0	0	11-10-2024 01:41	0
Open	Employee	0	0	0	11-10-2024 01:40	0

Bulk Api Monitoring



Before you import your data...

Clean up your data import file
 You'll have fewer errors to resolve if your data file is clean and free of duplicates. Watch video.


Make sure your field names match Salesforce field names
 You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. View a list of Salesforce data fields.

Don't import too many records at once
 Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

Collapse

➤ Creating HR Role:

A Role defines a users visibility access at the record level. Roles may be used to specify the types of access that people in your salesforce organization can have ton data. By expanding all to add the role under whom the role works the label name as HR, assigning role responsibilities, custom object employee.



Setup Home Object Manager

Users
Roles
 Feature Settings
 Sales
 Contact Roles on Contracts
 Contact Roles on Opportunities
 Service
 Case Teams
 Case Team Roles
 Contact Roles on Cases

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

SETUP
Roles

Role Edit
New Role Help for this Page

Role Edit

Label

Role Name

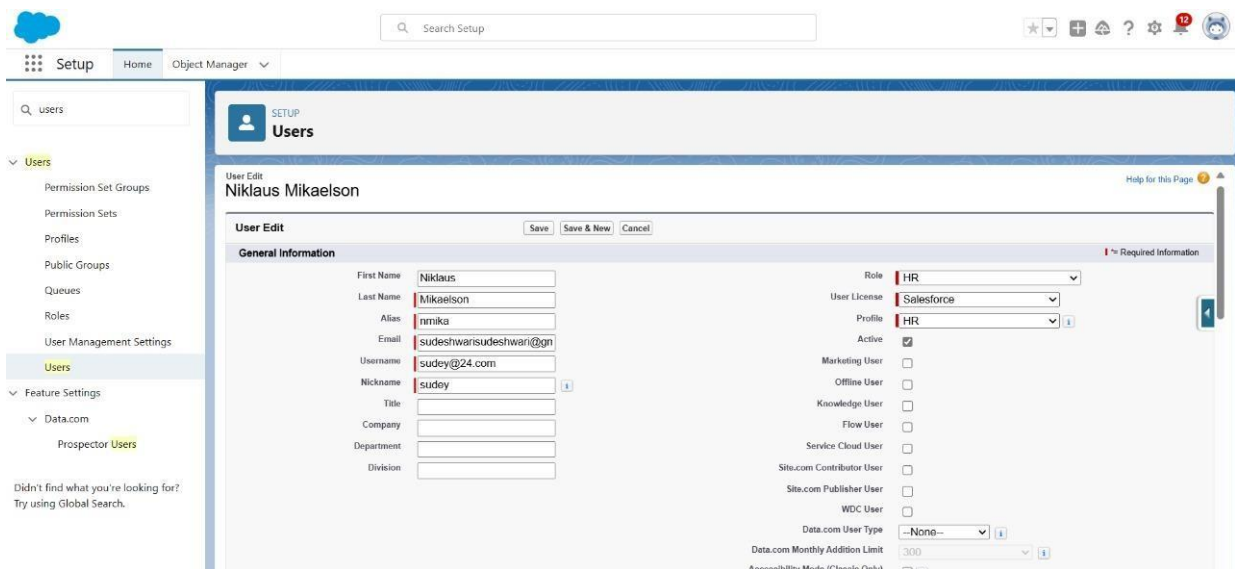
This role reports to

Role Name as displayed on reports

Save Save & New Cancel

➤ Creating User:

A user is anyone who logs in to Salesforce. Users are employees in a company such as sales reps, managers, and IT specialists, who need access to the company records.



The screenshot shows the Salesforce 'User Edit' page for a user named Niklaus Mikaelson. The page is divided into two main sections: 'General Information' and 'User Information'.

General Information:

- First Name: Niklaus
- Last Name: Mikaelson
- Alias: nmika
- Email: sudeswharisudeswari@gm
- Username: sudey@24.com
- Nickname: sudey
- Title:
- Company:
- Department:
- Division:

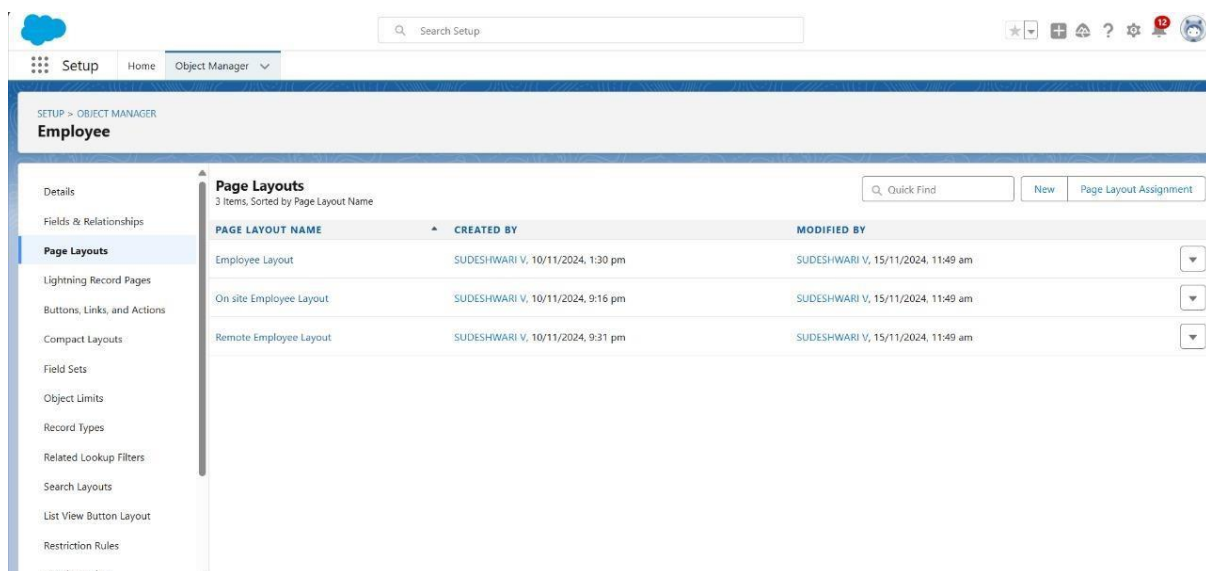
User Information:

- Role: HR
- User License: Salesforce
- Profile: HR
- Active: ☒
- Marketing User: ☐
- Offline User: ☐
- Knowledge User: ☐
- Flow User: ☐
- Service Cloud User: ☐
- Site.com Contributor User: ☐
- Site.com Publisher User: ☐
- WDC User: ☐
- Data.com User Type: --None--
- Data.com Monthly Addition Limit: 300
- Accessibility Mode (Classic Only):

Buttons at the top: Save, Save & New, Cancel.

➤ Page Layouts:

Page Layout in salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom object's detail and edit pages.

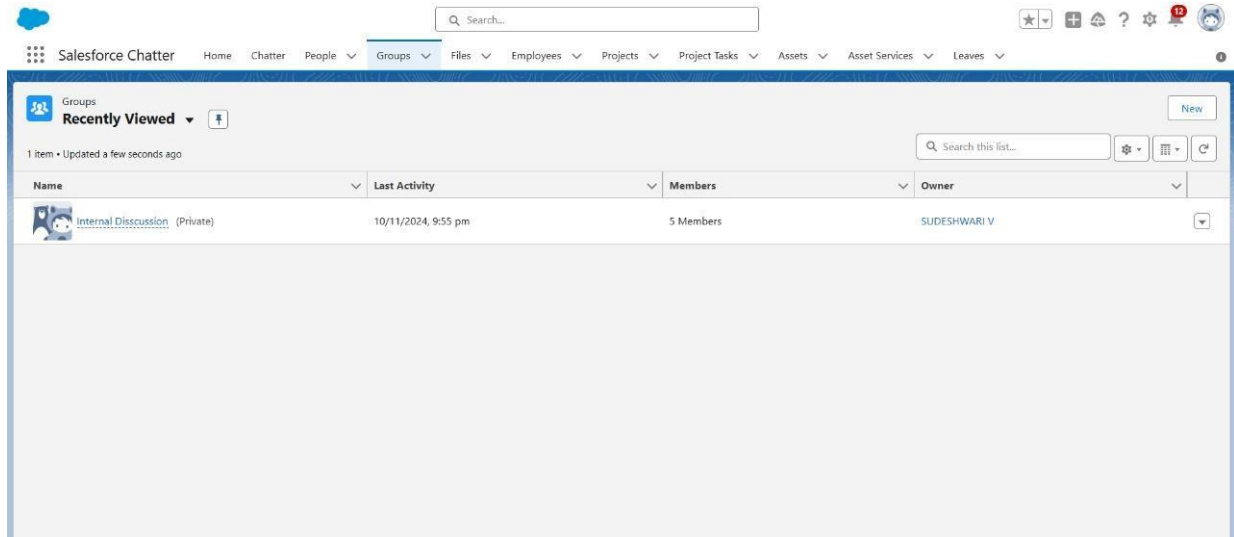


The screenshot shows the Salesforce 'Page Layouts' page for the 'Employee' object. The page displays a list of three page layouts: Employee Layout, On site Employee Layout, and Remote Employee Layout. The table below summarizes the data shown in the screenshot.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Employee Layout	SUDESHWARI V, 10/11/2024, 1:30 pm	SUDESHWARI V, 15/11/2024, 11:49 am
On site Employee Layout	SUDESHWARI V, 10/11/2024, 9:16 pm	SUDESHWARI V, 15/11/2024, 11:49 am
Remote Employee Layout	SUDESHWARI V, 10/11/2024, 9:31 pm	SUDESHWARI V, 15/11/2024, 11:49 am

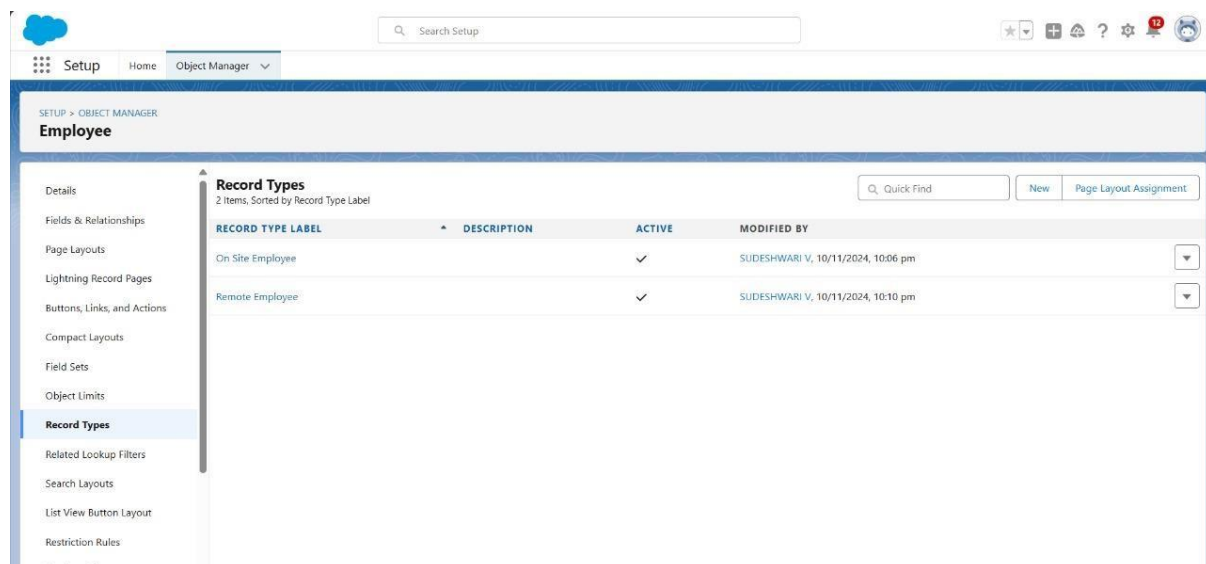
➤ Creating Chatter Groups:

Salesforce Chatter Groups are collaborative spaces within the Salesforce platform that enable teams to communicate, share information, and collaborate on projects. They provide a centralized hub for discussions, file sharing, and updates, allowing users to stay connected, streamline workflows, and enhance productivity.



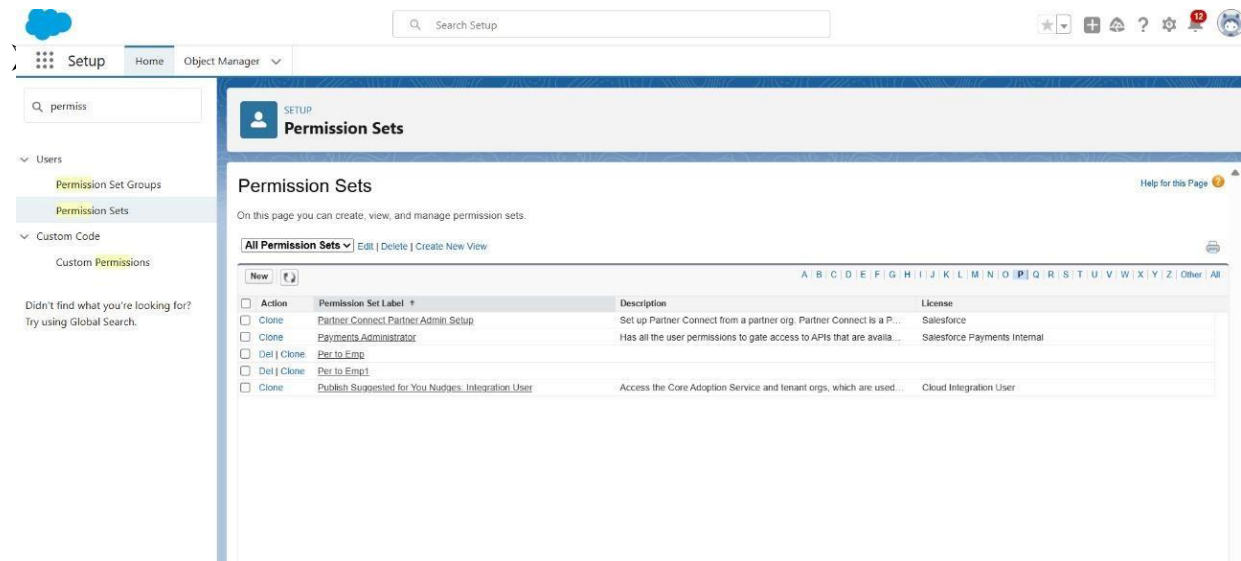
➤ Creating On Site Employee Record:

Record Types are a way of grouping many records of one type for that object. These can be applied to any standard or custom object, and allow you to have a different page layout, fields, required fields, and picklist values. Record types allow administrators to create a different page layout with custom picklist fields and values for the same business process and various business processes.



➤ Permission Sets:

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

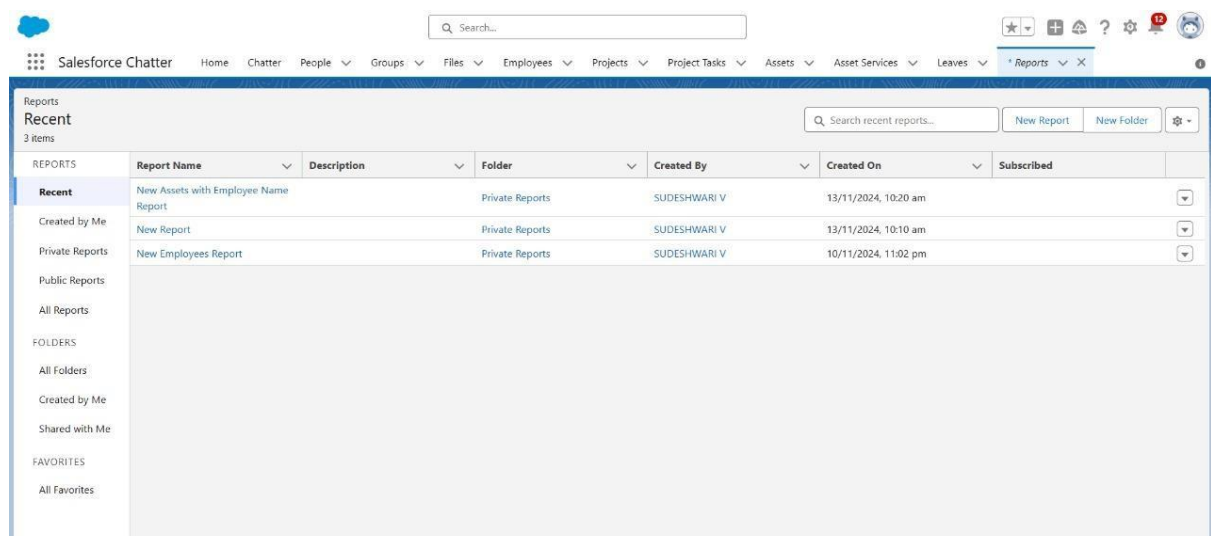


The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'permis' and a list of categories: Users, Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and includes a table of existing permission sets.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Partner Connect Partner Admin Setup	Set up Partner Connect from a partner org. Partner Connect is a P...	Salesforce
<input type="checkbox"/> Clone	Payments Administrator	Has all the user permissions to gate access to APIs that are availa...	Salesforce Payments Internal
<input type="checkbox"/> Del Clone	Per to Emp		
<input type="checkbox"/> Del Clone	Per to Emp1		
<input type="checkbox"/> Clone	Publish Suggested for You Nadpacs: Integration User	Access the Core Adoption Service and tenant orgs, which are used...	Cloud Integration User

➤ Report:

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

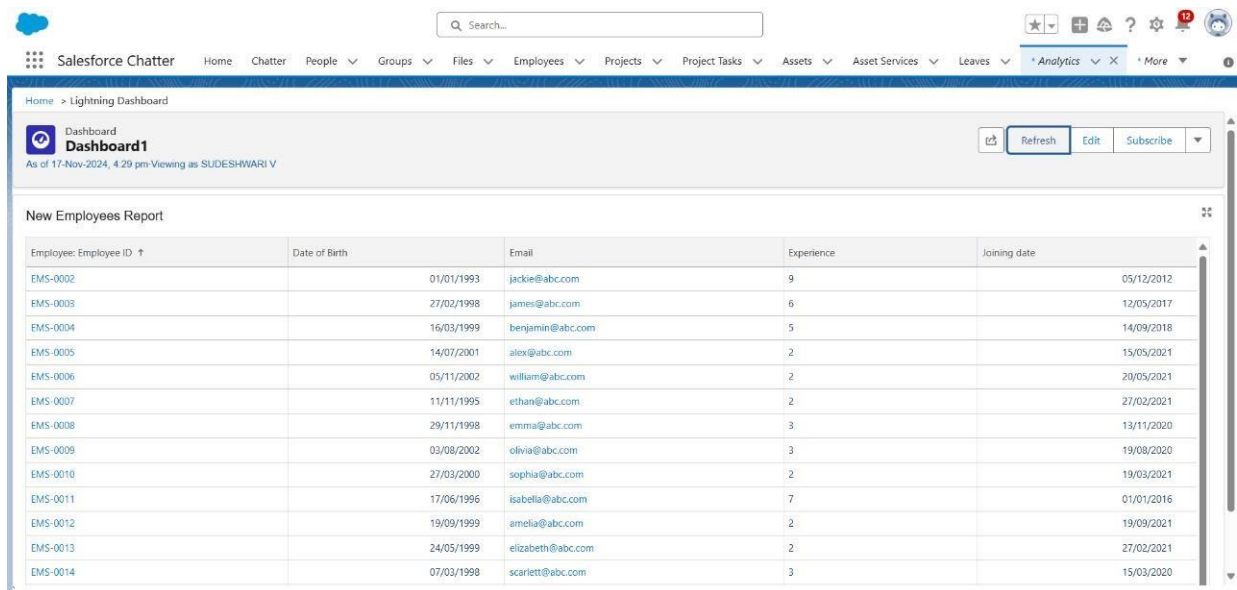


The screenshot shows the Salesforce Reports interface. The left sidebar contains a search bar with 'Search recent reports...' and a list of categories: Recent, Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, FAVORITES, and All Favorites. The main content area displays a table of recent reports.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Assets with Employee Name Report		Private Reports	SUDESHWARI V	13/11/2024, 10:20 am	<input type="checkbox"/>
New Report		Private Reports	SUDESHWARI V	13/11/2024, 10:10 am	<input type="checkbox"/>
New Employees Report		Private Reports	SUDESHWARI V	10/11/2024, 11:02 pm	<input type="checkbox"/>

➤ Dashboard:

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities.



Home > Lightning Dashboard

Dashboard
Dashboard1
As of 17-Nov-2024, 4:29 pm Viewing as SUDESHWARI V

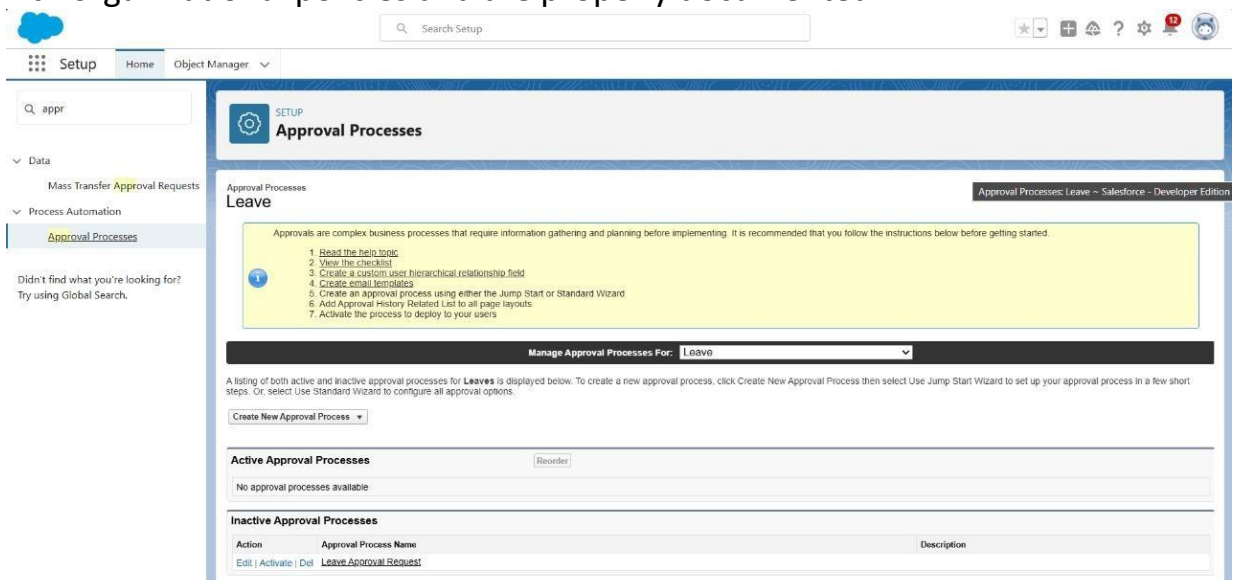
Refresh Edit Subscribe

New Employees Report

Employee: Employee ID ↑	Date of Birth	Email	Experience	Joining date
EMS-0002	01/01/1993	jackie@abc.com	9	05/12/2012
EMS-0003	27/02/1998	james@abc.com	6	12/05/2017
EMS-0004	16/03/1999	benjamin@abc.com	5	14/09/2018
EMS-0005	14/07/2001	alex@abc.com	2	15/05/2021
EMS-0006	05/11/2002	william@abc.com	2	20/05/2021
EMS-0007	11/11/1995	ethan@abc.com	2	27/02/2021
EMS-0008	29/11/1998	emma@abc.com	3	13/11/2020
EMS-0009	03/08/2002	olivia@abc.com	3	19/08/2020
EMS-0010	27/03/2000	sophia@abc.com	2	19/03/2021
EMS-0011	17/06/1996	isabella@abc.com	7	01/01/2016
EMS-0012	19/09/1999	amelia@abc.com	2	19/09/2021
EMS-0013	24/05/1999	elizabeth@abc.com	2	27/02/2021
EMS-0014	07/03/1998	scarlett@abc.com	3	15/03/2020

➤ Approval Process:

A set of steps designed to review, validate, and authorize tasks or transactions related to workforce management. This process ensures that actions like employee onboarding, promotions, leave requests, and payroll changes comply with organizational policies and are properly documented.



Setup Home Object Manager

Search Setup

Approval Processes

Approval Processes: Leave ~ Salesforce - Developer Edition

Leave

Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

1. Read the help topic.
2. View the checklist.
3. Create a custom user hierarchical relationship field.
4. Create email templates.
5. Create an approval process using either the Jump Start or Standard Wizard.
6. Add Approval History Related List to all page layouts.
7. Activate the process to deploy to your users.

Manage Approval Processes For: Leave

Create New Approval Process

Active Approval Processes

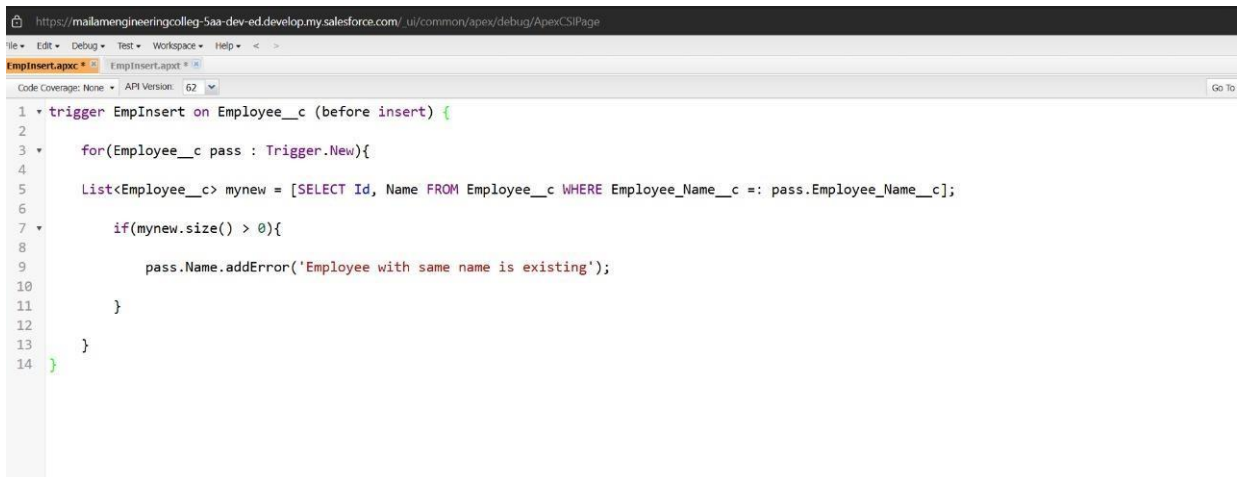
No approval processes available

Inactive Approval Processes

Action	Approval Process Name	Description
Edit Activate Del	Leave Approval Request	

➤ **Apex Trigger:**

To automate processes related to employee records, leave management, Work hours tracking, or any other HR-Related tasks managed in salesforce.



```
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 }
```

Testing and Validation for the Workforce Administration solution Project:

Testing and validation in workforce administration are essential to ensure that the strategies, systems, and policies implemented are effective, efficient, and meet organizational objectives. Testing involves evaluating the performance and functionality of workforce management tools, such as scheduling software, payroll systems, and time-tracking mechanisms. This ensures that the system can handle various scenarios, such as peak work hours, overtime calculations, and employee availability. Validation goes beyond functional testing to assess whether these systems meet legal and compliance standards, organizational needs, and employee expectations. This includes checking whether the payroll complies with labor laws, ensuring equitable scheduling practices, and verifying that employee data privacy is protected.

Effective testing and validation in workforce administration also focus on the alignment between workforce strategies and organizational goals. For example, validating the effectiveness of training programs can determine if employees have the necessary skills to perform their roles, enhancing overall productivity. Testing the recruitment process ensures that hiring procedures attract the best candidates while aligning with diversity and inclusion initiatives. Furthermore, testing the communication systems within workforce management ensures that employees receive accurate and timely information, fostering transparency and trust.

Moreover, these processes help identify potential risks, such as errors in payroll, understaffing, or misalignment between demand and staffing levels. Regular testing and validation allow for timely corrective actions and adjustments to workforce management policies and systems, optimizing performance and enhancing employee satisfaction. By maintaining rigorous testing and validation processes, organizations can adapt to changing workforce dynamics and legal requirements, ensuring long-term success and operational efficiency.

Key Scenarios Addressed by Salesforce in the Implementation Project:

1. Centralized Employee Data Management

Scenario: Disparate systems for employee data make it hard to maintain consistency and access real-time information.

Salesforce Solution:

- Create a unified Employee Profile object to store all employee-related data, including personal details, roles, job history, and performance metrics.
- Integrate with HR systems like Workday or SAP SuccessFactors for seamless data syncing.
- Use automation to update data across connected systems in real-time.

2. Streamlined Recruitment and Onboarding

Scenario: Recruitment processes are fragmented, leading to inefficiencies and poor candidate experience.

Salesforce Solution:

- Use Salesforce's Sales Cloud or Custom objectives to track job applications, interviews, and hiring stages,
- Automate workflows for tasks like sending offer letters, assigning onboarding tasks, and setting up new employee profiles.
- Integrate with learning management systems(LMS) to enroll new hires in training programs automatically.

3. Leave and Attendance Management

Scenario: Employees face delays in leave approvals, and managers lack visibility into team schedules.

Salesforce Solution:

- Build a Leave Request object to handle leave submissions and approvals.
- Use Approval Processes to route requests to managers or HR.
- Create dashboards for managers to view attendance trends, overtime, and leave balances.

Conclusion:

The Workforce Administration Solution, integrated with the Automobile Sales CRM, serves as a transformative tool for streamlining workforce management, optimizing sales processes, and enhancing customer interactions. By leveraging cutting-edge features such as automated task allocation, real-time performance tracking, and seamless data integration, the solution empowers businesses to achieve greater operational efficiency and improved decision-making. The rigorous testing and validation process ensures the solution meets business requirements, maintains data integrity, and adheres to industry standards. The system's scalability and flexibility enable it to adapt to the evolving needs of the organization, driving sustained growth and competitive advantage. In conclusion, the Workforce Administration Solution not only simplifies workforce management but also provides actionable insights for better resource utilization, customer satisfaction, and overall productivity. It stands as a robust foundation for achieving business objectives in a dynamic and competitive environment.