

INTRODUCTION

Team ID : LTVIP2025TMID29792

Team Size : 4

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Ideation Phase

Define the Problem Statements

Date	20 June 2025
Team ID	LTVIP2025TMID29792
Project Name	Workforce Administration Solution (Dev)

Customer Problem Statement Template:

Managing workforce operations such as attendance tracking, leave management, shift scheduling, payroll processing, and compliance reporting has become increasingly complex and inefficient due to reliance on manual processes and disconnected systems. HR managers and administrative staff face constant challenges in maintaining accuracy, ensuring timely processing, and delivering a smooth employee experience. Employees often struggle with delayed responses, lack of transparency, and no self-service access to critical information. These pain points not only reduce productivity but also lead to dissatisfaction among both staff and management. The absence of a centralized, automated solution causes communication breakdowns, operational delays, and an increased risk of errors and non-compliance. There is a strong need for an integrated workforce administration system that simplifies HR operations, reduces manual effort, increases accuracy, and improves employee engagement.

Example:

Problem Statement (PS)	I am (Customer)	I'm trying to	But	Because	Which makes me feel
PS-1	an HR Manager	manage attendance and leave records accurately	the current process is manual and error-prone	there's no integrated system to track everything in one place	frustrated, overworked, and anxious about errors
PS-2	an Admin Officer	generate payroll efficiently	the attendance data is scattered across different systems	I need to manually collect, cross-check, and calculate the data	stressed and afraid of mistakes
PS-3	an Employee	request leave and access my payslips easily	I need to email HR or wait for responses	there's no employee self-service portal	helpless and unimportant
PS-4	a Team	adjust team	I don't	everything is	stressed and

	Leader	shifts in real time	have access to live attendance data	updated manually after the fact	inefficient
PS-5	a Compliance Officer	ensure labor law compliance in workforce management	data tracking is inconsistent and scattered	there's no automated alert or audit system	worried about legal exposure and audit failure

Ideation Phase

Empathize & Discover

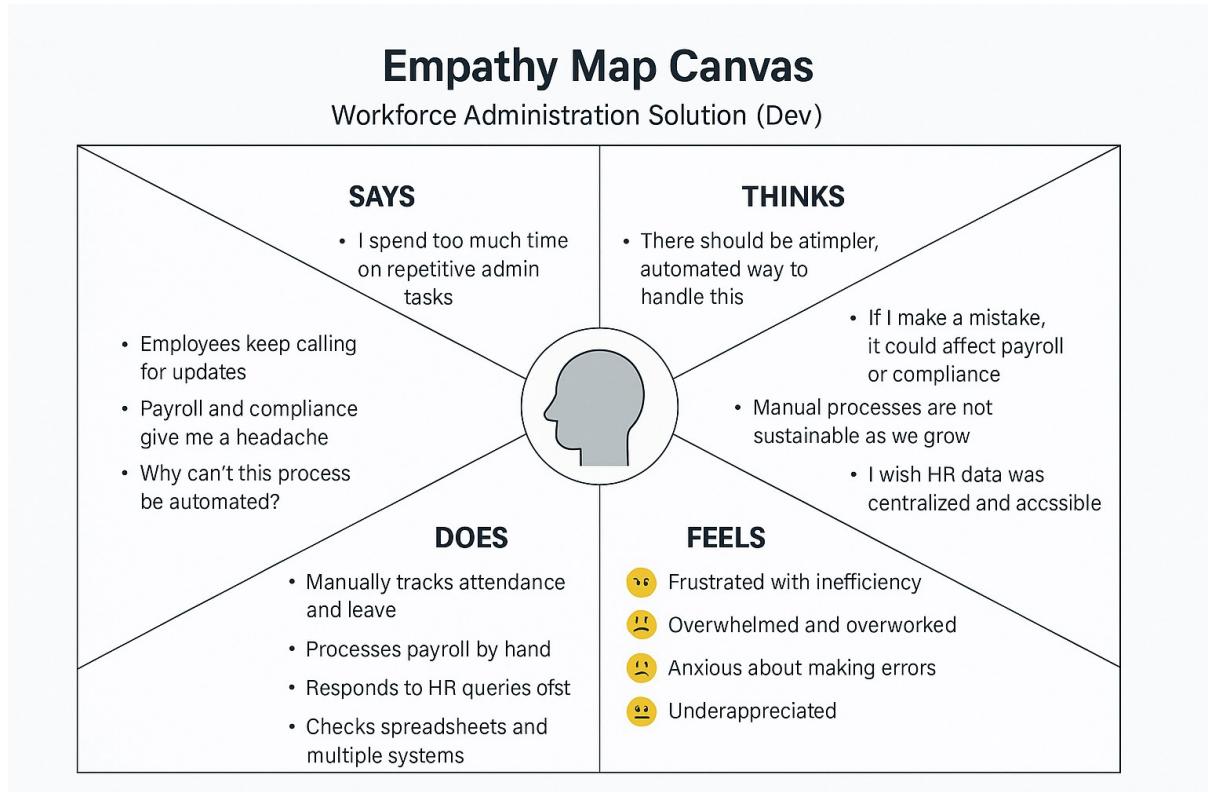
Date	20 June 2025
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Empathy Map Canvas:

The HR manager often **says** they are tired of spending hours managing attendance, leave, and payroll through outdated manual processes. They frequently express frustration when employees ask for updates that should be accessible through a self-service system. Internally, they **think** there must be a better way to streamline workforce administration and often worry about making mistakes that affect payroll accuracy or compliance. They also feel the pressure of scaling operations without a scalable system in place.

In their daily tasks, they **do** everything from maintaining Excel sheets to manually coordinating with other departments to gather data. They **feel** overwhelmed, undervalued, and anxious about the consequences of human error in critical HR functions. The lack of integration across systems adds to their stress. Their **pain points** include fragmented tools, repetitive work, and limited access to real-time data. What they truly need is a centralized, automated workforce administration platform. This would help them feel confident, efficient, and more in control of HR operations.

Example:



Example: Food Ordering & Delivery Application

Example: Food Ordering & Delivery Application

Category	Ideas
Attendance & Shifts	<ul style="list-style-type: none">• Biometric logins• Mobile check-ins
Payroll & Compliance	<ul style="list-style-type: none">• Auto salary calc• Leave-pay sync
Employee Self-Service	<ul style="list-style-type: none">• Leave requests• Payslip download• Personal info update
HR Analytics	<ul style="list-style-type: none">• Reports on attrition• productivity
Communication Tools	<ul style="list-style-type: none">• HR alerts• Feedback systems• Issue tracking

Ideation Phase

Brainstorm & Idea Prioritization Template

Date	20/06/2025
Team ID	LTVIP2025TMID29792
Project Name	Workforce Administration Solution (Dev)

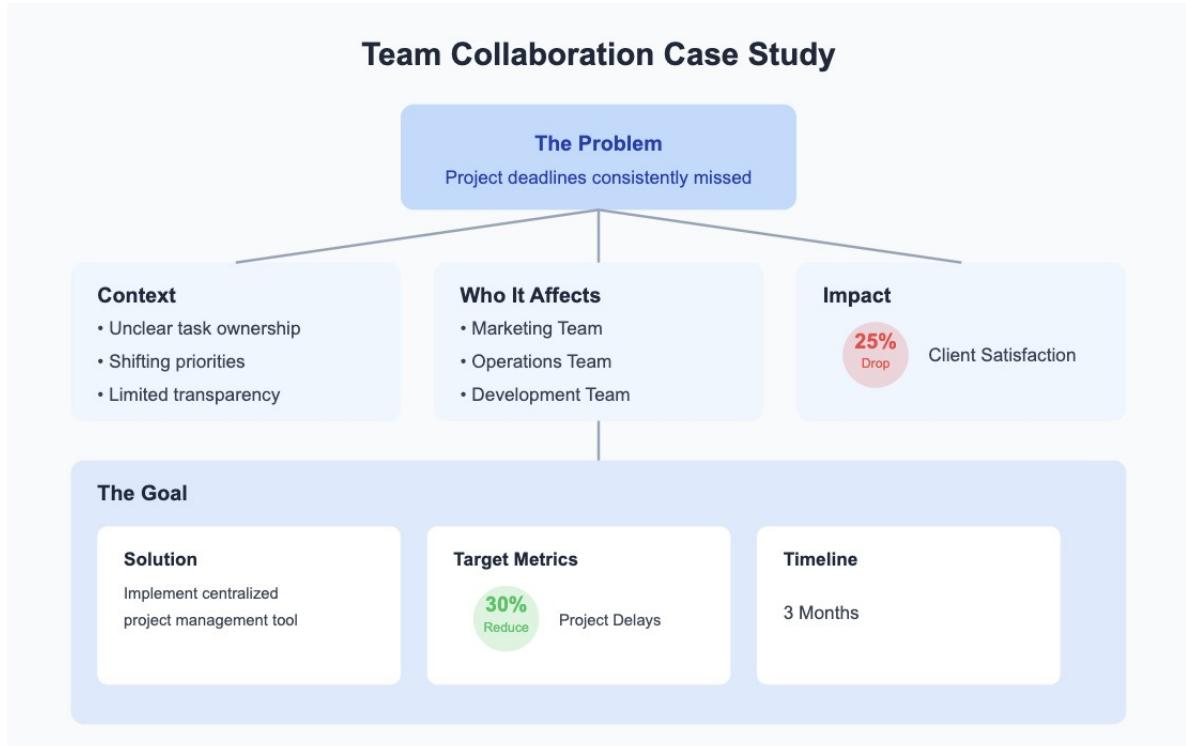
Brainstorm & Idea Prioritization Template:

Brainstorming provides a free and open environment that encourages everyone within a team to participate in the creative thinking process that leads to problem solving. Prioritizing volume over value, out-of-the-box ideas are welcome and built upon, and all participants are encouraged to collaborate, helping each other develop a rich amount of creative solutions.

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

Reference: <https://www.mural.co/templates/brainstorm-and-idea-prioritization>

Step-1: Team Gathering, Collaboration and Select the Problem Statement



Step-2: Brainstorm, Idea Listing and Grouping

Idea Listing

Capture all raw ideas—big or small. Examples:

Biometric & mobile attendance tracking

Automated payroll integration

Digital onboarding & offboarding

Real-time shift assignment & change requests

Employee self-service portal (ESS)

Compliance tracking & alerts

Analytics dashboard for HR KPIs

Remote work monitoring tools

AI chatbot for HR queries

Grouping Ideas by Function

Category	Ideas
Attendance & Shifts	Biometric logins, Mobile check-ins, Shift swap system
Payroll & Compliance	Auto salary calculation, Leave-pay synchronization, Legal alerts
Employee Self-Service	Leave requests, Payslip download, Personal information update
HR Analytics	Reports on attrition, productivity, absenteeism
Training & Support	Digital onboarding, e-Learning modules, HR chatbot
Communication Tools	HR alerts, Feedback systems, Issue tracking

Step-3: Idea Prioritization

Idea	Impact	Feasibility	Cost	Urgency	Priority
Biometric Attendance System	High	High	Medium	High	Top Priority
Mobile Check-in for Remote Employee	High	Medium	Low	High	High
Employee Self-Service Portal	High	Medium	Medium	Medium	High
Shift Swap Feature	Medium	High		Medium	Medium
Payroll & Leave Sync Automation	High	Medium	Medium	High	Top Priority
Real-time HR	Medium	Medium	Medium	Low	Medium

Dashboard (Analytics)					
HR Chatbot for Employee Support	Medium	High	Low	Low	Low
Digital Onboarding	Medium	Medium	Medium	Medium	Medium
Legal Compliance Alert System	High	Medium	Medium	High	High

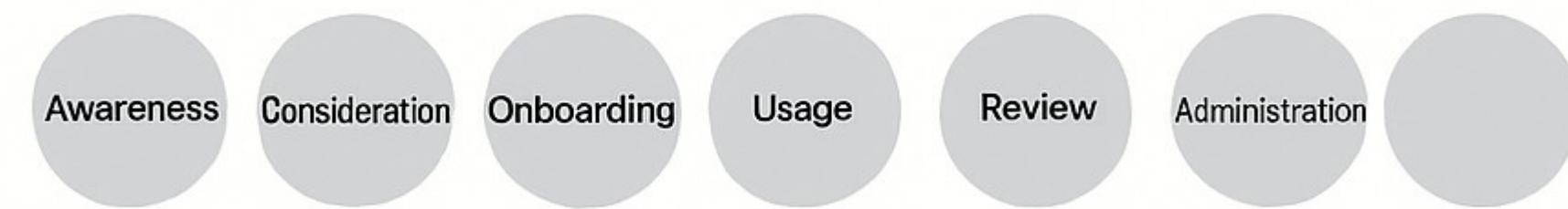
Guided city tours

Stage	User Action	Touchpoints	Experience	Pain Points	Opportunities
Awareness	Learns about the workforce system	HR mail, training, onboarding	Curious, Interested	Unfamiliar with features	Provide quick demo & training videos
Onboarding	Logs in, sets up profile, configures team data	Web Portal, Mobile App	Confused initially	UI/UX not intuitive	Simplified dashboard, tooltips
Usage	Uses system for attendance, shifts, leave	Biometric device, Mobile, Web	Efficient, Mixed	Manual shift entries, delayed leave approval	Automate shifts, improve approval workflow
Reporting	Views analytics on team productivity	Reports Module, Notifications	Informative	Limited filtering	Add advanced report filters & charts
Payroll Process	Sends data to finance	Payroll Integration, Export Buttons	Smooth or slow	Integration errors	Add export verification & backup options
Support	Needs help with access or data errors	Helpdesk, Chatbot, Email	Frustrated or satisfied	Delayed support responses	Add live support, FAQs, chat support

CUSTOMER JOURNEY MAP

WORKFORCE ADMINISTRATION

SOLUTION (DEV)



Employee Activities	Searches for a solution to track attendance and request time off	Explores the software's features for clocking in and leave management	Lets into the system, learns to submit leave requests	Clocks in/out, requests leave checks attendance regularly	Provides feedback on system usability and leave process	Updates personal information, views leave balances
HR Activities	—	Reviews the system capabilities for managing employee	Provides access to employees sets up records in system	Approves leave requests monitors attendance records	Limited visibility into workforce data	Privacy and security concerns
Pain Points	Difficulty managing attendance records and leave requests	Time consuming manual processes	Offer comprehensive training and support	Improve accuracy with biometric integration	Enhance reporting and analytics capabilities	Reinforce data protection measures
Opportunities	Highlight benefits of	Demonstrate off-	Offer comprehensive	Privacy and security	Privacy and security	Reinforce data protection

Project Design Phase-II
Solution Requirements (Functional & Non-functional)

Date	20 June 2025
Team ID	LTVIP2025TMID29792
Project Name	Workforce Administration Solution (Dev)

Functional Requirements:

Following are the functional requirements

ID	Requirement	Description
FR1	Employee Login & Authentication	Secure login for employees, HR, admin, and payroll roles.
FR2	Attendance Tracking	Automatic attendance logging via biometric or mobile check-in.
FR3	Leave Management	Employees can request, cancel, or track leave.
FR4	Shift Scheduling	Shift assignment, editing, and swap features for supervisors.
FR5	Payroll Export	Generate payroll-ready reports based on attendance and leave data.
FR6	Employee Self-Service Portal	Employees can view their attendance, leave balance, and profile.
FR7	Admin Panel	Full control to manage roles, access rights, and data consistency.
FR8	Notifications	Email/SMS alerts for leave approvals, shift changes, and pay cycles.

Non-functional Requirements:

Following are the non-functional requirements

ID	Requirement	Description

NFR-1	Security	Role-based access control, encrypted data storage.
NFR-2	Usability	Clean UI, mobile-friendly interface.
NFR-3	Performance	Quick response times under load, especially during payroll processing.
NFR-4	Scalability	Should support small to large organizations without performance drops.
NFR-5	Availability	System should be available 99.9% of the time.
NFR-6	Backup & Recovery	Automatic data backups and fast disaster recovery system.
NFR7	Maintainability	Easy to update features, fix bugs, and manage deployments.

Project Design Phase-II

Data Flow Diagram & User Stories

Date	20 June 2025
Team ID	LTVIP2025TMID29792
Project Name	Workforce Administration Solution (Dev)

Data Flow Diagrams:

This level shows the system as a single process and how it interacts with external entities.

External Entities:

HR Manager – Manages workforce data, approves leave, views reports.

Employees – Apply leave, view attendance, update profile.

Payroll System – Receives salary data for processing.

Biometric Device – Sends attendance data.

Main Process:

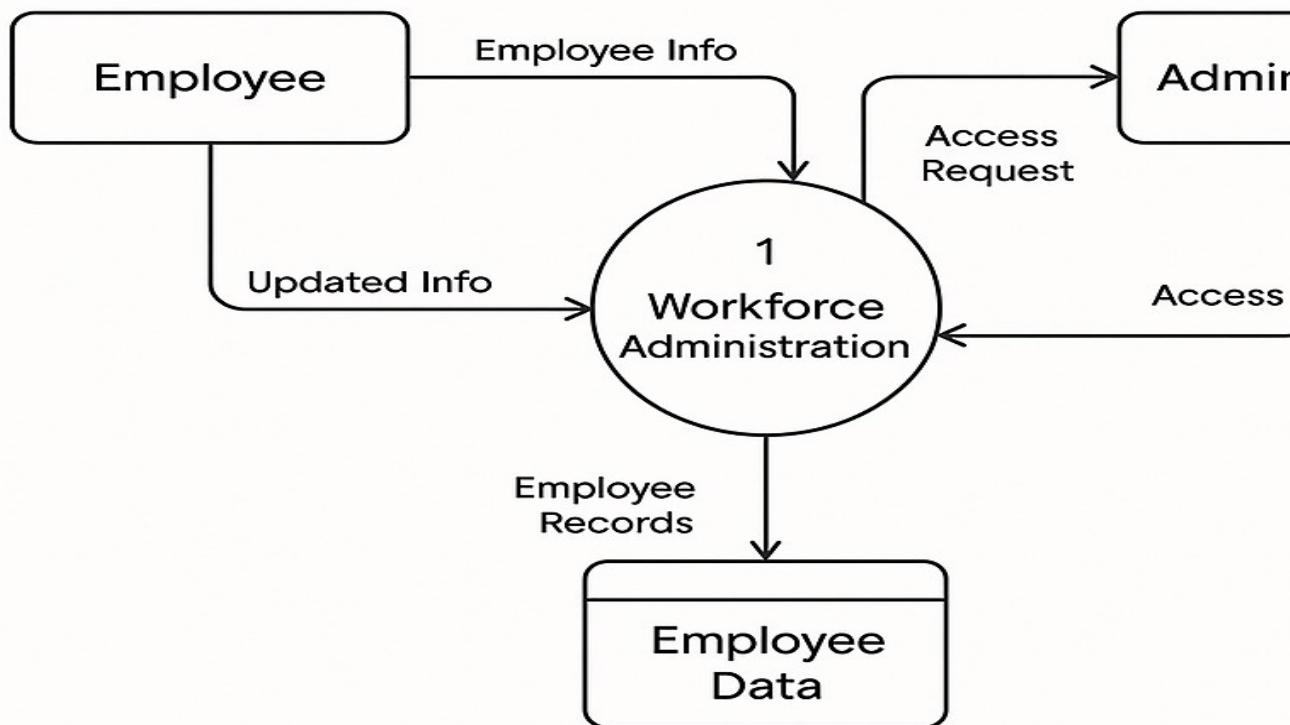
Workforce Admin System (central process)

Data Stores:

Employee Database – Stores personal, attendance, shift, leave data.

Example: (Simplified)

WORKFORCE ADMINISTRATION SOLUTION



DATA FLOW

User Stories:

User Role	User Story	DFD Component	Data Interaction
HR Manager	Manage employee records	External Entity	Updates to Employee Data
HR Manager	Approve leave requests	External Entity	Sends approval to Workforce Admin
HR Manager	View reports for analysis	External Entity	Receives processed data
Employee	Apply for leave	External Entity	Sends leave request to Shift Supervisor
Employee	View attendance record	External Entity	Reads from Attendance Record
Shift Supervisor	Assign or swap shifts	External Entity	Sends updates to Shift Supervisor
Payroll Officer	Access attendance and leave data	External Entity	Reads data for salary processing

User Role	User Story	DFD Component	Data Interaction
Admin	Manage system users and permissions	External Entity	Updates to User Access
Biometric Device	Automatically log attendance	External System (Device)	Sends raw data to Admin
Payroll System	Generate payroll using attendance and leave info	External System	Receives structured data

Project Design Phase-II

Technology Stack (Architecture & Stack)

Date	20 June 2025
Team ID	Workforce Administration Solution (Dev)
Project Name	LTVIP2025TMID29792

Technical Architecture:

The Workforce Administration Solution (Dev) is built on a modular, scalable three-tier architecture comprising:

1. Frontend (Presentation Layer):

React.js / HTML / CSS / Tailwind CSS – For building responsive, user-friendly web interfaces.
Flutter / React Native – For cross-platform mobile access to attendance and leave modules.

2. Backend (Application Layer):

Node.js with Express.js – Handles core business logic and APIs.
JWT / OAuth 2.0 – Provides secure authentication and role-based access control.
Socket.IO / Firebase – Enables real-time updates and notifications (e.g., attendance status).

3. Database & Storage (Data Layer):

PostgreSQL – For structured employee, shift, and leave data.
MongoDB – Optional NoSQL layer for flexible document-based storage (e.g., logs, feedback).
Cloud Storage (AWS S3 / Firebase Storage) – Stores documents, exports, and backups.

4. DevOps & Hosting:

Docker & GitHub Actions – For containerization and CI/CD automation.
AWS / Azure / Google Cloud – Reliable cloud hosting and scalable infrastructure.

5. Analytics & Reporting:

Power BI / Metabase – For workforce insights, dashboards, and exportable report

TECHNOLOGY STACK – Workforce Administration Solution (Dev)

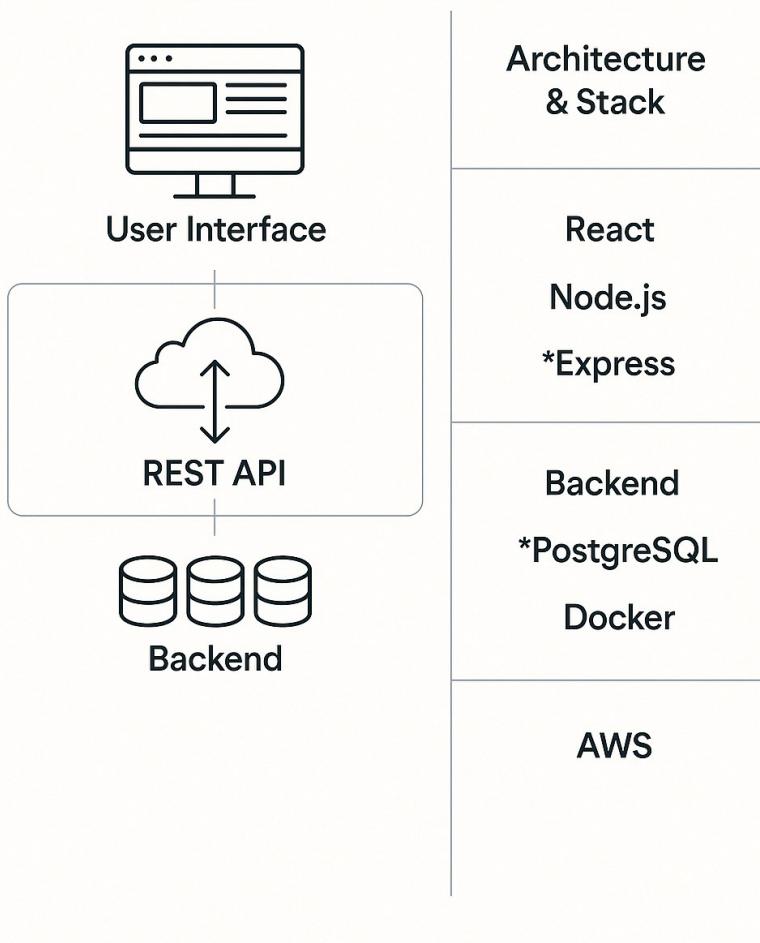


Table-1 : Components & Technologies:

S.NO	Layer	Technology	Pu
	Frontend (UI)	React.js / HTML5 / Tailwind CSS	Us ad
	Mobile Access	Flutter or React Native	Mo shi
	Backend (API & Logic)	Node.js / Express.js	Ha pro

	Authentication	JWT / OAuth 2.0	See
	Database	PostgreSQL / MongoDB	Storage
	Real-time Sync	Firebase / Socket.IO	Real-time
	Cloud Hosting	AWS / Azure / GCP	Hosting
	DevOps / CI-CD	GitHub Actions / Docker / Jenkins	Automation
	Analytics	Metabase / Power BI	Visualization
	Security Tools	SSL, Firewalls, Role-based Access Control	Data Security

Table-2: Application Characteristics:

S.No	Characteristics	Description	Tech
	Secure user login and access control	Individual components like attendance, leave, and payroll can operate independently.	Technology
	Scalability	Supports growing teams from small startups to large enterprises.	e.g. Container
	Real-Time Processing	Instant updates for attendance, notifications, and shift changes.	Technology
	Role-Based Access	Secure login and permissions for employees, HR, and admin.	Technology
	Cross-Platform Access	Available on both web browsers and mobile devices.	Technology
	Integration-Friendly	Can integrate with biometric devices, payroll systems, and analytics tools.	
	User-Friendly Interface	Simple and intuitive UI for all user roles.	
	Data Security	Encrypted data storage and secure authentication mechanisms.	

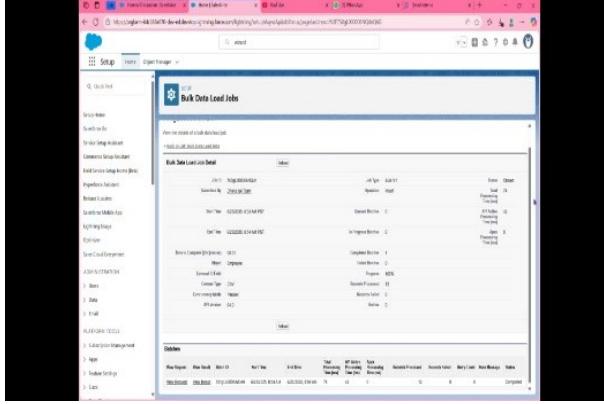
Project Development Phase

Model Performance Test

Date	28 June 2025
Team ID	LTVIP2025TMID29792
Project Name	WORKFORCE ADMINISTRATION (DEV)
Maximum Marks	

Model Performance Testing:

Project team shall fill the following information in model performance testing template.

S.No.	Parameter	Values	Screenshot
	Model Summary	<p>Salesforce automation setup for Data management using Object, Fields and Reports.</p> <p>Note : Import Records if data Match Correctly then Records will Created or Else it will Show Error</p>	
	Accuracy	<p>Training Accuracy - 98%</p> <p>Validation Accuracy - 98%</p>	<p>Congratulations, your import has started!</p> <p>Click OK to view your import status on the Bulk Data Load Job page.</p> 
3.	Confidence Score (Only Yolo Projects)	<p>Instead of a detection confidence, this solution ensures field-level accuracy via validation logic. > Example: When incorrect field data (e.g., wrong picklist value or duplicate entry) is submitted, the system rejects it and provides feedback—mirroring high “confidence” in data governance.</p>	

Project Documentation -

Workforce Administration

1. Introduction

Project Title: Workforce Administration (DEV)

Team Members: [P.Dhana Raj, K.Haritha Ganilakshmi,K Durga Gayatri Rama Devi,K.kotipalli]

2. Project Overview

Purpose:

To streamline HR operations by automating employee data management, asset tracking, leave approvals, and performance reporting using Salesforce tools.

Features:

Custom objects: Employee, Asset, Leave

Master-detail relationships and reporting manager hierarchy

Flows and Process Builder for automated approvals

Apex triggers for data validation

Dashboards and reports for decision-making

Role-based access using Profiles and Permission Sets

3. Architecture :

Platform: Salesforce Lightning

Backend Logic: Apex (Triggers, Validation Rules), Flows

Process Automation: Flow Builder and Process Builder

UI: Lightning Pages, Tabs, Dashboards

Data Model: Master-detail (Employee ↔ Asset), Lookup (Leave ↔ Employee)

4. Setup Instructions

Prerequisites: Salesforce Developer Org

Steps:

Login to your Salesforce org

Create custom objects and fields

Configure relationships and page layouts

Create flows for approval and dashboards

Add Apex trigger for duplicate validation

Set up Lightning App with navigation tabs

5. Object & Data Model:

= **Employee Object:** Stores personal details and reporting manager

Asset Object: Linked to Employee for tracking assigned assets

Leave Object: Contains leave dates, duration, and approval status

(*Optionally include an ER diagram or field list here*)

6. Running the Application

Access: Open the Lightning App “Workforce Admin”

Navigation: Use tabs to access Employees, Assets, Leaves, Dashboards, Reports

7. Automation Flow & Apex Logic

Flow: LeaveApprovalFlow handles approval routing based on days requested

Apex Trigger: Prevents duplicate employee creation during record submission

8. Security & Access Control

Role Hierarchy, Profiles, and Permission Sets control visibility

Manager roles can access dashboards; employees can only view their data

9. User Interface

Lightning UI with custom tabs

Dashboards showing KPIs like project allocation and asset use

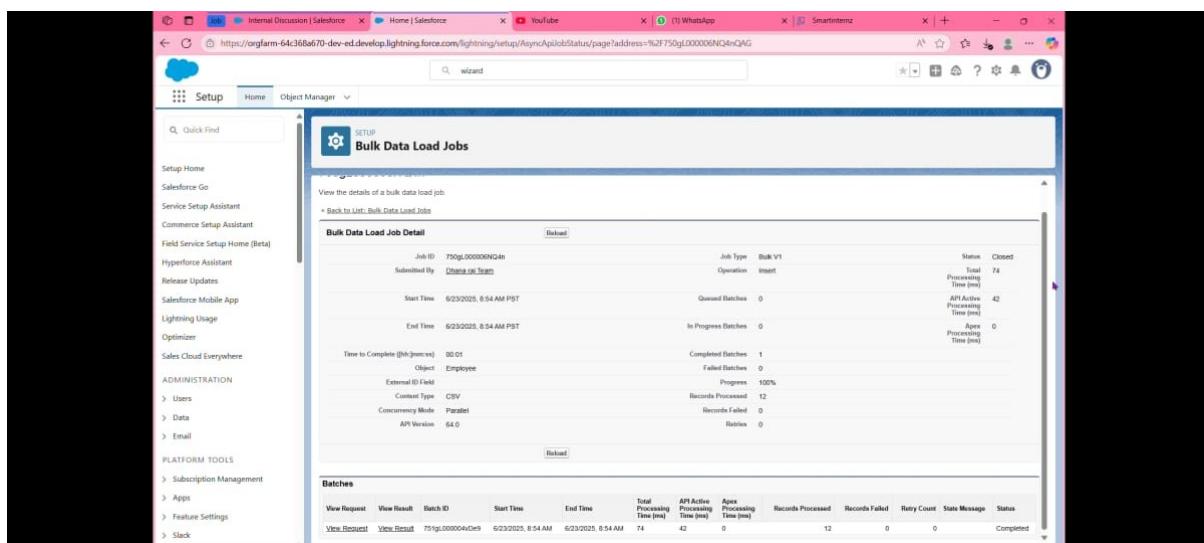
10. Testing

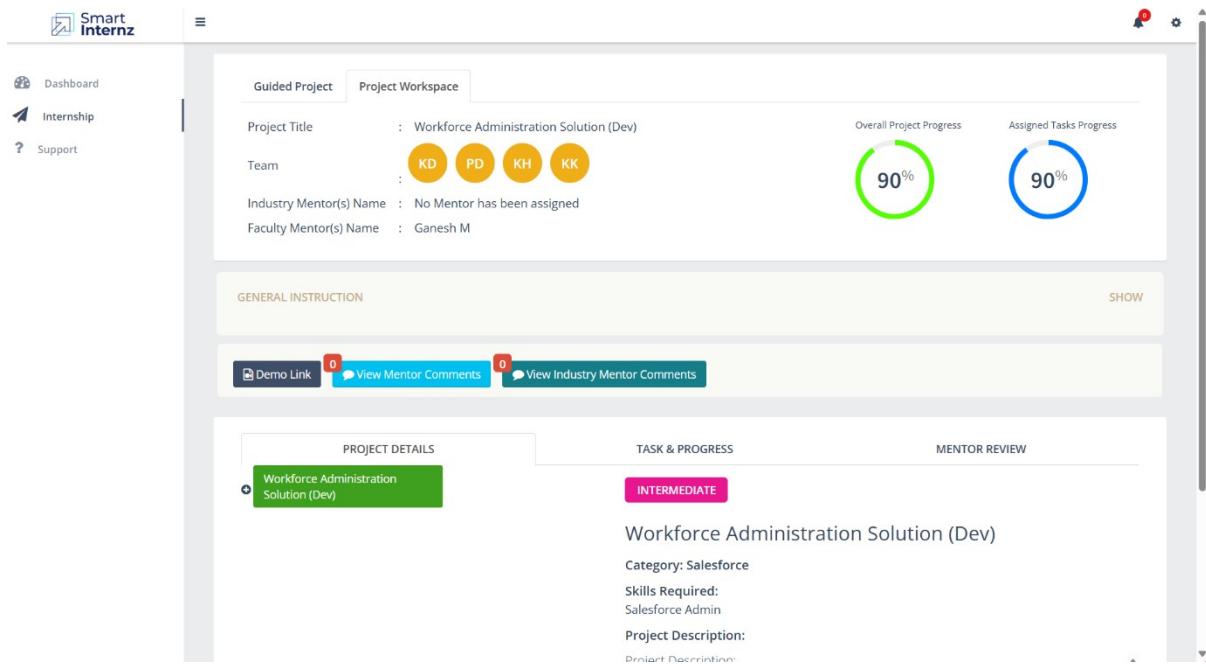
Manual testing via UAT

5 test cases covering creation, validation, automation, and access

UAT passed all scenarios with accurate data outcomes

11. Screenshots or Demo:





The screenshot shows the Smart Internz Project Workspace interface. At the top, there's a navigation bar with icons for Dashboard, Internship, and Support. Below it, a header bar has tabs for Guided Project (selected) and Project Workspace. The main content area displays project details: Project Title (Workforce Administration Solution (Dev)), Team (KD, PD, KH, KK), Industry Mentor(s) Name (No Mentor assigned), Faculty Mentor(s) Name (Ganesh M), Overall Project Progress (90%), and Assigned Tasks Progress (90%). A section for General Instruction includes a Demo Link button and two comment count indicators (0 for both). Below this are three tabs: PROJECT DETAILS (selected, showing Workforce Administration Solution (Dev)), TASK & PROGRESS (INTERMEDIATE), and MENTOR REVIEW (disabled). The PROJECT DETAILS tab also lists Category (Salesforce), Skills Required (Salesforce Admin), and Project Description (partial description visible).

12. Known Issues

Leave approval email alert may not trigger if template is not set

Dashboard load time may vary for users with limited access rights

13. Future Enhancements

Slack/email notifications for approvals

Advanced filters in dashboards

Integration with external HR systems or APIs

Project Design Phase

Solution Architecture

Date	
Team ID	LTVIP2025TMID29792
Project Name	Work force Administration (Dev)
Maximum Marks	

Solution Architecture - Workforce Administration Solution

Solution architecture in the Workforce Administration Solution project is a structured and strategic approach to transforming The Smart Bridge's manual, fragmented workforce management into an integrated digital platform built on Salesforce.

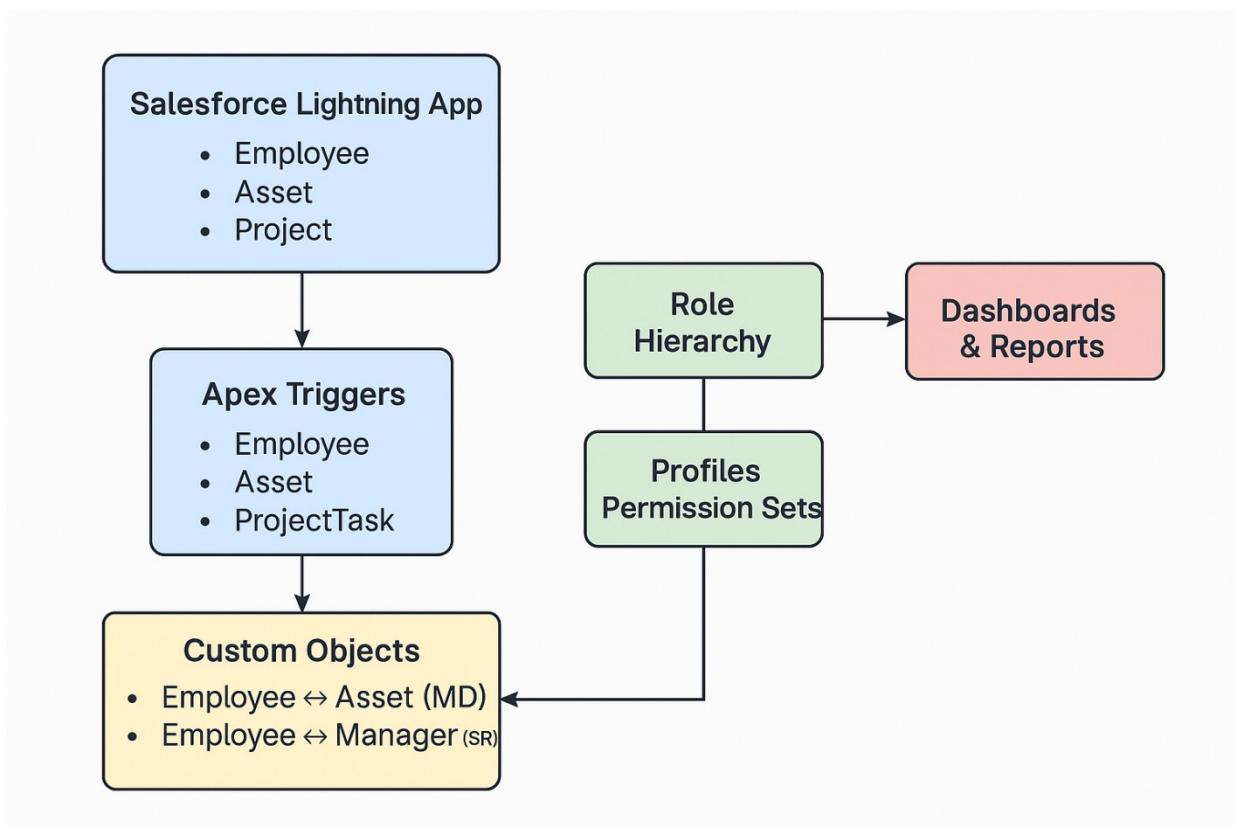
Its goals are to:

Identify the best Salesforce-based configuration to streamline employee tracking, asset assignment, project participation, and leave approvals.

Describe the architecture and behaviour of the system—detailing how custom objects, data relationships, automation flows, and dashboards operate together to meet user needs.

Define core features, development phases, and workflow logic, such as Apex triggers, approval processes, role hierarchies, and Lightning App configurations.

Deliver a blueprint for how the solution is developed, managed, and deployed using Salesforce's declarative tools and minimal custom code, while ensuring scalability and data security.



Example - System Architecture & Data Flow for Workforce Administration Diagram.

Project Planning Phase

Project Planning Template (Product Backlog, Sprint Planning, Stories, Story points)

Date	
Team ID	LTVIP2025TMID29792
Project Name	Workforce Administration
Maximum Marks	

Product Backlog, Sprint Schedule, and Estimation (4 Marks)

Use the below template to create product backlog and sprint schedule

Sprint	Functional Requirement (Epic)	User Story Number	User Story / Task	Story Points
Sprint-1	Employee object	USN-1	As an HR admin, I can create an employee record with a reporting manager using a custom Employee object.	5
Sprint-1	Asset mapping	USN-2	As an admin, I can assign assets to employees using a master-detail relationship between Employee and Asset objects.	4
Sprint-2	Leave Approval Automation	USN-3	As an employee, I can request leave and trigger an approval process based on the number of leave days requested.	3
Sprint-2	Duplicate Record Prevention	USN-4	As a system, I should prevent the creation of duplicate employee names using an Apex trigger during record submission.	3
Sprint-2	Security & Access control	USN-5	As an admin, I can control user access through Profiles, Roles, and Permission Sets to ensure secure data visibility.	3
Sprint-2	Project Assignment Dashboard	USN-6	As a manager, I can view dashboards showing employee participation, project distribution, and asset usage metrics.	3
Sprint-3	Lightning App Navigation	USN-7	As a user, I can navigate all relevant tabs and features through a Lightning App designed for workforce administration.	2
Sprint-3	Reporting & Analytics	USN-8	As a team lead, I can access reports that summarize employee attendance, project assignments, and asset tracking trends.	2

Project Tracker, Velocity & Burndown Chart: (4 Marks)

Sprint	Total Story Points	Duration	Sprint Start Date	Sprint End Date (Planned)	Story Point Completed

					Planned End Date
Sprint-1	20	2 Days	20 Oct 2022	22 Oct 2022	20
Sprint-2	20	2 Days	23 Oct 2022	24 Nov 2022	
Sprint-3	20	2 Days	25 Nov 2022	26 Nov 2022	
Sprint-4	20	2 Days	27 Nov 2022	28 Nov 2022	

Velocity Calculation

To estimate team productivity per iteration unit, the average velocity (AV) is calculated as:

$$AV = \text{Total Story Points Completed} \div \text{Sprint Duration (in Days)}$$

Given:

Total Story Points = 20

Sprint Duration = 10 Days

$$\text{Average Velocity} = 20 \div 10 = 2 \text{ story points/day}$$

Thus, the team's **average velocity is 2 story points per day**

▣ Burndown Chart Data

Day	Planned Story Points Remaining	Actual Story Points Remaining
Day 1 (20 Jun)	30	30
Day 2 (21 Jun)	25	27
Day 3 (22 Jun)	20	22
Day 4 (23 Jun)	15	18
Day 5 (24 Jun)	10	12
Day 6 (25 Jun)	5	6
Day 7 (26 Jun)	0	3
Day 8 (27 Jun)	—	1
Day 9 (28 Jun)	—	0

Format the chart:

X-axis: Days

Y-axis: Story Points Remaining

Add a legend to distinguish **Planned** vs. **Actual** lines.

This will give you a clean visual showing how my team progressed across the sprint timeline.

Project Design Phase
Problem – Solution Fit Template

Date	
Team ID	LTVIP2025TMID29792
Project Name	Work force Administration(dev)
Maximum Marks	

Problem – Solution Fit Template:

Problem :

The Smart Bridge faces difficulty in managing employees across multiple projects and tracking the status of their assets. Current workflows rely on manual record-keeping, resulting in inefficiencies, inconsistent reporting, and limited visibility for HR and project managers.

Solution :

A Salesforce-based Workforce Administration Solution that centralizes employee data, automates asset assignment, and provides real-time dashboards for team performance and project tracking.

Purpose:

Solve the complex challenge of distributed employee tracking and resource oversight.
Accelerate process adoption using familiar cloud-based tools and web interfaces.
Increase communication clarity with role-based dashboards and automation flows.
Build trust and improve internal operations by offering transparency and centralized control.
Understand and elevate workforce performance through customized reports and visual KPIs.

Template:

Problem-Solution fit canvas 2.0

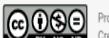
Purpose / Vision

Explore AS, differentiate

Focus on J&P, tap into BE, understand RC

Extract online & offline CH of BE

Define CS, fit into CC	1. CUSTOMER SEGMENT(S) Who is your customer? i.e. working parents of 0-5 y.o. kids	CS	6. CUSTOMER CONSTRAINTS What constraints prevent your customers from taking action or limit their choices of solutions? i.e. spending power, budget, no cash, network connection, available devices.	CC	5. AVAILABLE SOLUTIONS Which solutions are available to the customers when they face the problem or need to get the job done? What have they tried in the past? What pros & cons do these solutions have? i.e. pen and paper is an alternative to digital notetaking Spreadsheets, emails, verbal approvals, and offline request slips. Maintaining data via Excel sheets, managing approvals through emails or meetings, storing asset logs manually	AS
	HR professionals, team leads, and project managers at The Smart Bridge who manage employee assignments, asset distribution, and leave approval workflows.		Lack of centralized access to updated records, over-dependence on manual methods (Excel, paperwork), limited automation, and inconsistent access to internal systems from remote devices.			
Focus on J&P, tap into BE, understand RC	2. JOBS-TO-BE-DONE / PROBLEMS What jobs-to-be-done (or problems) do you address for your customers? There could be more than one; explore different sides. Centralized employee and asset tracking Streamlined leave approvals Access-controlled visibility and role-based dashboards Prevention of duplicate entries	J&P	9. PROBLEM ROOT CAUSE What is the real reason that this problem exists? What is the back story behind the need to do this job? i.e. customers have to do it because of the change in regulations. Daily—during onboarding, assigning devices, weekly approvals, or project shifts. Siloed operations, manual data updates, delayed approvals, lack of standard formats, and no centralized tracking system.	RC	7. BEHAVIOUR What does your customer do to address the problem and get the job done? i.e. directly related: find the right solar panel installer, calculate usage and benefits; indirectly associated: customers spend free time on volunteering work (i.e. Greenpeace) Uses email for approvals, Excel for record-keeping, updates managers verbally or via chat, and stores data locally. Repetitive and ongoing; happens multiple times per day across departments.	BE
Identify strong TR & EM	3. TRIGGERS What triggers customers to act? i.e. seeing their neighbour installing solar panels, reading about a more efficient solution in the news. New hires, leave requests, asset handovers, project deadline shifts, audit schedules.	TR	10. YOUR SOLUTION If you are working on an existing business, write down your current solution first, fill in the canvas, and check how much it fits reality. If you are working on a new business proposition, then keep it blank until you fill in the canvas and come up with a solution that fits within customer limitations, solves a problem and matches customer behaviour. A Salesforce-based Lightning App with: Custom Objects for Employee, Project, and Asset Master-detail relationships for clean data linking Automated Approval Processes for leave Apex Trigger for duplicate name prevention Role-based layouts via Profiles, Roles, Permission Sets Dashboards to monitor participation and asset status	SL	8. CHANNELS OF BEHAVIOUR 8.1 ONLINE What kind of actions do customers take online? Extract online channels from #7 Salesforce Lightning App, Chatter, Email, Reports & Dashboards, Mobile Access:	CH
	4. EMOTIONS: BEFORE / AFTER How do customers feel when they face a problem or a job and afterwards? i.e. lost, insecure > confident, in control - use it in your communication strategy & design. Before: Frustration, worry, confusion, inefficiency After: Confidence, relief, clarity, time-savings	EM			 8.2 OFFLINE What kind of actions do customers take offline? Extract offline channels from #7 and use them for customer development. HR Desk Visits, Team meetings, paper forms, phone calls,	



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★ AMALTAMA

References:

- <https://www.idealhackers.network/problem-solution-fit-canvas/>
- <https://medium.com/@epicantus/problem-solution-fit-canvas-aa3dd59cb4fe>

User Acceptance Testing (UAT) Template

Date	28-06-2025
Team ID	LTVIP2025TMID29792
Project Name	Workforce Administration (DEV)
Maximum Marks	

Project Overview:

Project Name: [Workforce Administration]

Project Description: [A centralized Salesforce-based application to manage employee records, project participation, asset tracking, and leave approval workflows for The SmartBridge.]

Project Version: [V1.0]

Testing Period: [25 June 2025] to [28 June 2025]

Testing Scope:

Features to Be Tested:

Employee object creation with reporting structure

Asset assignment via master-detail relationships

Leave approval automation

Apex trigger for duplicate prevention

Profiles, roles, and permission control

Dashboards and reports

User Stories/Requirements Covered: USN-1 to USN-8 – covering all epics related to HR automation, project mapping, and reporting.

Testing Environment:

URL/Location: [<https://developer.salesforce.com/>]

Credentials (if required): [Username : rejectedpeace814319@agentforce.com

 Password : 236K1A044]

Test Cases:

Test Scenario	Test Steps	Expected Result	Actual Result	Pass/Fail
Tc -001	Employee creation and hierarchy assignment	1Navigate to Employee tab 2Create new record 3Assign manager	Employee record was successfully created with assigned reporting manage	[✓]
Tc -002	Asset assignment	Navigate to Employee tab → Create new record → Assign manager	Asset was properly linked and displayed under the corresponding employee Record	[✓]
Tc -003	Leave approval process	Submit leave request → Approver receives it → Approver responds	Leave request triggered approval workflow and status updated in approval history	[✓]
Tc -004	Duplicate entry prevention	Attempt to create employee with existing name → Save	system prevented duplicate entry with appropriate validation error message	[✓]
Tc -005	Dashboard visibility based on roles	Login as manager → Open Dashboard tab	<i>Dashboard displayed only relevant data according to the user's role.</i>	[✓]

Bug Tracking:

Bug ID	Bug Description	Steps to reproduce	Severity	Status	Additional feedback
BG-001	Leave request approval email not triggered	Submit leave request → Wait for approver email	Medium	In Progress	Review Process Builder and email alert configurations.
BG-002	Assigned asset not showing under employee record	Assign asset → Refresh employee record	High	Open	Check master-detail relationship and object visibility settings.

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Sign-off:

Tester Name: [ALL TEAM MEMBERS]

Date: [28-6-2025]

Step1: first we created account in salesforce development ([Developer Edition with Agentforce and Data Cloud - Salesforce.com](#))

The image shows two screenshots. The left screenshot is the Salesforce login page, displaying a blue cloud logo at the top. Below it is a form with fields for 'Username' containing 'rejectedpeace814319@agentforce.com' and 'Password' containing '*****'. There is a 'Log In' button, a 'Remember me' checkbox, and a 'Forgot Your Password?' link. The right screenshot is the Dreamforce 2025 homepage, which has a dark blue background with the text 'Big names. Bigger ideas. Only at Dreamforce.' and 'From iconic storytellers to AI visionaries, a lineup like this only happens here. Stay tuned – this is just the beginning.' It features circular portraits of Ellen Pompeo and Tekedra Mawakana, along with their names and titles: 'Ellen Pompeo, Actress & Producer' and 'Tekedra Mawakana, co-CEO, Waymo'. A 'Register now' button is visible at the top.

Step 2: Activated the account

The image shows the Salesforce Workforce Administration interface. At the top, there is a navigation bar with links for Employees, projects, projectTasks, Assets, Assess Services, Reports, Dashboards, Leaves, and a dropdown for 'Dhana raj Team'. Below the navigation is a banner for the 'Dhana raj Team' with a blue bear icon and a call to action: 'Share your awesomeness with the world. (Or at least with your colleagues on Chatter.)'. To the right of the banner are links for 'Edit' and 'User Detail'. Further down, there are sections for 'Details' and 'Related'. The 'Details' section contains fields for Name ('Dhana raj Team'), Manager, Company Name ('Ideal Institute of technology'), Email ('rejectedpeace814@gmail.com'), Phone, Address ('India'), Mobile, and About Me ('Share your awesomeness with the world. (Or at least with your colleagues on Chatter.)'). The 'Related' section includes a 'Groups' section with one item ('Internal Discussion 5') and a 'Files' section with two items ('WhatsApp Image 2025-06-21 at 11.47.51 AM' and 'WhatsApp Image 2025-06-21 at 11.47.51 AM').

Step 3: next created Employee object



Setup Home Object Manager ▾

SETUP
New Custom Object

New Custom Object

Help for this Page 🎉

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit [Save](#) [Save & New](#) [Cancel](#)

Custom Object Information I = Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label <input type="text" value="Employee"/> Example: Account Plural Label <input type="text" value="Employees"/> Example: Accounts Starts with vowel sound <input type="checkbox"/>

The Object Name is used when referencing the object via the API.

Object Name <input type="text" value="Employee"/> Example: Account

Description

Context-Sensitive Help Setting Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page

Content Name

Step 4: next created custom object

The screenshot shows the Salesforce Setup Object Manager. At the top, there's a search bar with 'Search Setup' and a toolbar with various icons. The main area is titled 'Object Manager' with a 'SETUP' button. Below it, a message says 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles.' A 'Help for this Page' link is also present.

New Custom Object

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: project **Example:** Account

Plural Label: projects **Example:** Accounts

Starts with vowel sound: I

The Object Name is used when referencing the object via the API.

Object Name: project **Example:** Account

Description: [Empty text area]

Context-Sensitive Help Setting:

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content Name: None

Enter Record Name Label and Format:

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: project Name **Example:** Account Name

Employee | Salesforce and 2 more pages - Personal - Microsoft Edge

Step 5:

Created objects with names As projectTask , Assest, Assest Service

Setup | Home | Object Manager

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Don't show this message again](#)

Custom Object Definition Edit [Save](#) [Save & New](#) [Cancel](#)

Custom Object Information ! Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label	Asset	Example: Account
Plural Label	Assets	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	I

The Object Name is used when referencing the object via the API.

Object Name	Assest	Example: Account
-------------	--------	------------------

Description

Context-Sensitive Help Setting

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content Name

00:07:27 00:13:40

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Assest Name Example: Account Name

Employee | Salesforce and 2 more pages - Personal - Microsoft... Text Warning: If you plan to insert a high volume of records in this object via the API for example, use the Text data type.

Setup | Home | Object Manager

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Don't show this message again](#)

Custom Object Definition Edit [Save](#) [Save & New](#) [Cancel](#)

Custom Object Information ! Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label	Asset Service	Example: Account
Plural Label	Asset Services	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	I

The Object Name is used when referencing the object via the API.

Object Name	Assest_Service	Example: Account
-------------	----------------	------------------

Description

Context-Sensitive Help Setting

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content Name

00:07:55 00:13:12

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Assest_Service Name Example: Account Name

Employee | Salesforce and 2 more pages - Personal - Microsoft... Text Warning: If you plan to insert a high volume of records in this object via the API for example, use the Text data type.

New Custom Object

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label	projectTask	Example: Account
Plural Label	projectTasks	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	projectTask	Example: Account
-------------	-------------	------------------

Description

Context-Sensitive Help Setting

<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
<input type="radio"/> Open a window using a Visualforce page

Content Name

-None-

Enter Record Name Label and Format

Record Name: projectTask Example: Account Name

Employee | Salesforce and 2 more pages - Personal - Microsoft...

Step 6:

Creating a custom tab employee

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit Del	Employees	Basic	

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

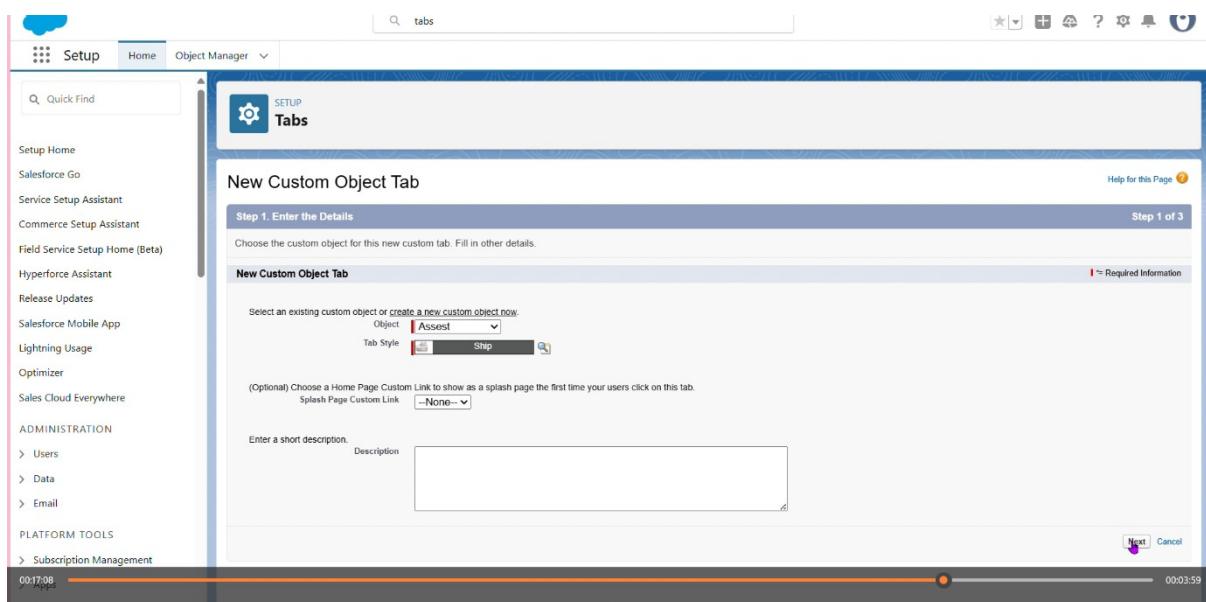
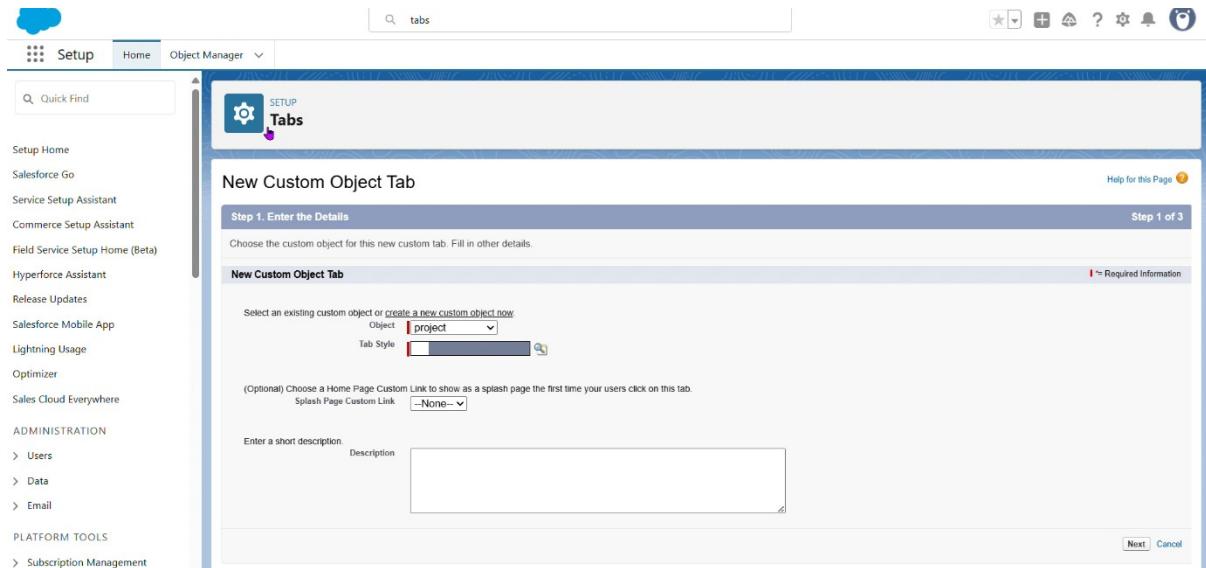
Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

Step 7:

Creating tabs for remaining objects also



The screenshot shows the Salesforce Setup interface with the 'Tabs' section selected. A search bar at the top right contains the word 'tabs'. The left sidebar lists various setup categories. The main content area is titled 'New Custom Object Tab' and is currently on 'Step 1. Enter the Details'. It asks to choose a custom object for the tab. An 'Object' dropdown is set to 'Asset Service', and a 'Tab Style' dropdown is set to 'Phone'. There's an optional field for a 'Splash Page Custom Link' which is set to '-None-'. A 'Description' text area is empty. At the bottom right are 'Next' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Tabs' section selected. The main content area is titled 'Custom Tabs' and provides information about creating new custom tabs. Below this, there are three sections: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. The 'Custom Object Tabs' section lists five tabs with their labels and styles:

Action	Label	Tab Style	Description
Edit Del	Assets	Ship	
Edit Del	Asset Services	Phone	
Edit Del	Employees	Boat	
Edit Del	projects	Heart	
Edit Del	projectTasks	Computer	

The 'Web Tabs' and 'Visualforce Tabs' sections both state 'No Web Tabs have been defined' and 'No Visualforce Tabs have been defined' respectively.

Step 8:

Creating lightning app

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name

* Developer Name

Description

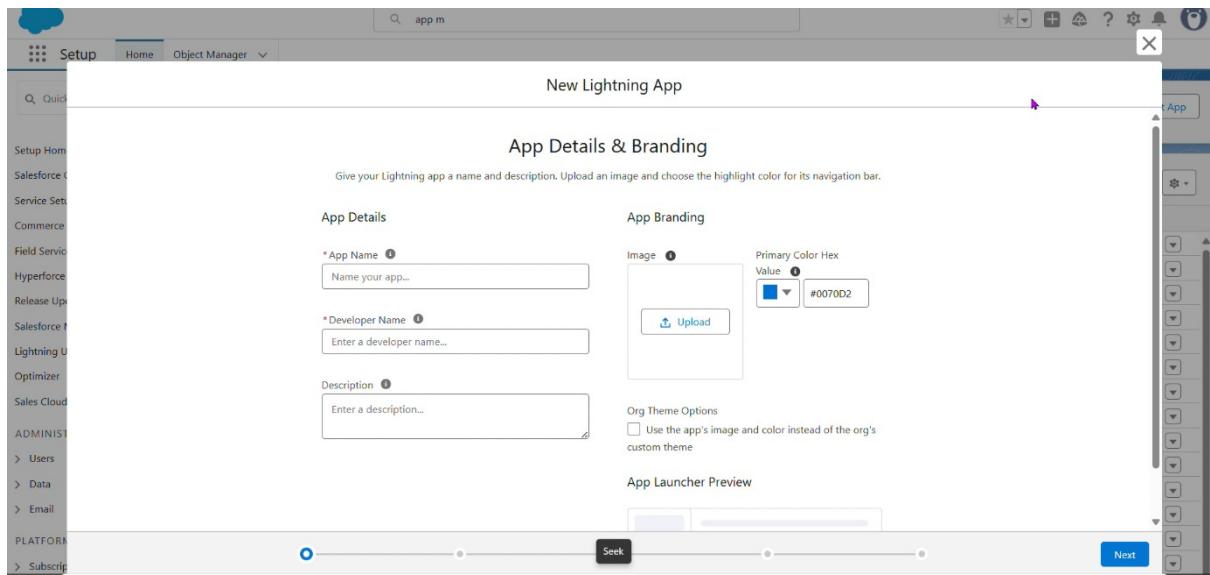
App Branding

Image

Primary Color Hex Value

Org Theme Options Use the app's image and color instead of the org's custom theme

App Launcher Preview



New Lightning App

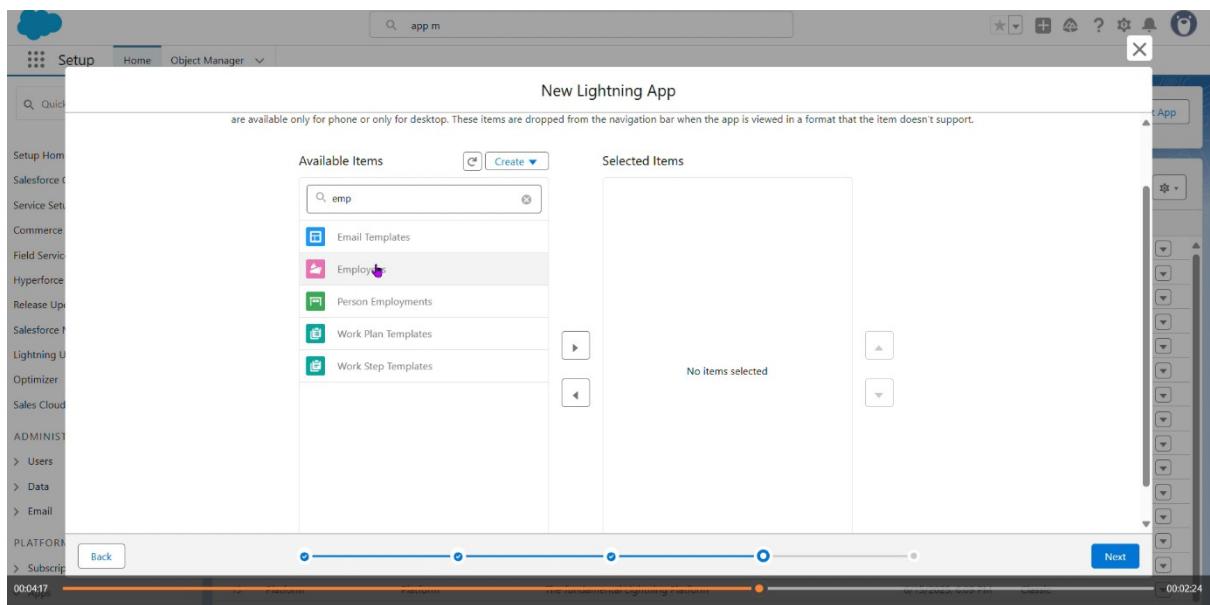
are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

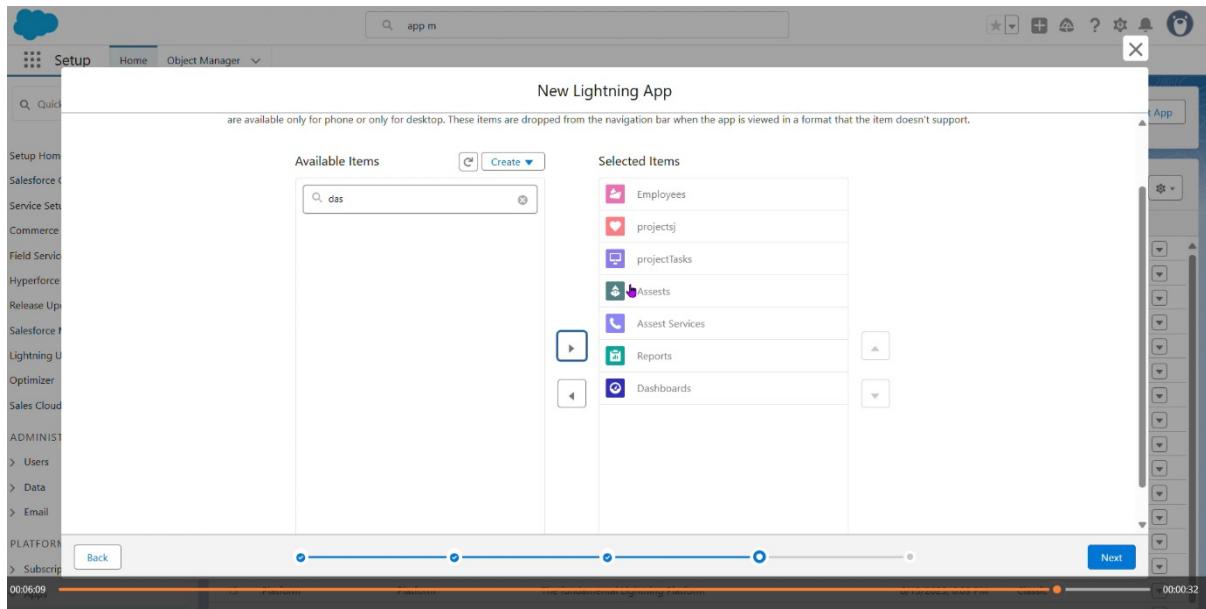
Available Items

Email Templates
Employee
Person Employments
Work Plan Templates
Work Step Templates

Selected Items

No items selected





App Name ↑	Developer Name	Description	Last Modified D...	App Ty...	Visibil...
11 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	6/15/2025, 6:09 PM	Lightning	✓
12 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	6/15/2025, 6:09 PM	Lightning	✓
13 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	6/15/2025, 6:09 PM	Classic	✓
14 My Service Journey	MSJApp	Discover new customer service capabilities.	6/15/2025, 6:09 PM	Lightning	✓
15 Platform	Platform	The fundamental Lightning Platform	6/15/2025, 6:09 PM	Classic	✓
16 Queue Management	QueueManagement	Create and manage queues for your business.	6/15/2025, 6:09 PM	Lightning	✓
17 Sales	Sales	The world's most popular sales force automation (SFA) solution	6/15/2025, 6:09 PM	Classic	✓
18 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	6/15/2025, 6:09 PM	Lightning	✓
19 Sales Cloud Mobile	SalesCloudMobile	New seller focused mobile first experience	6/15/2025, 6:09 PM	Lightning	✓
20 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	6/15/2025, 6:09 PM	Lightning	✓
21 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	6/15/2025, 6:09 PM	Classic	✓
22 Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	6/15/2025, 6:11 PM	Lightning	✓
23 Service	Service	Manage customer service with accounts, contacts, cases, and more	6/15/2025, 6:09 PM	Classic	✓
24 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across multiple cases	6/15/2025, 6:09 PM	Lightning	✓
25 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com editor	6/15/2025, 6:09 PM	Classic	✓
26 Subscription Management	RequiredAndConsole	Get started automating your revenue processes	6/15/2025, 6:09 PM	Lightning	✓
27 Workforce Administration	Workforce_Administrator_S...	A Salesforce Lightning App designed to manage workforce operations including	6/20/2025, 11:38 PM	Lightning	✓

Step 9:

Creating fields and relationship

Setting owd

The screenshot shows the Salesforce Sharing Settings page. The left sidebar has a search bar and sections for Security, Guest User Sharing Rule Access Report, and Sharing Settings (which is selected). A note says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Sharing Settings" and lists sharing rules for various objects:

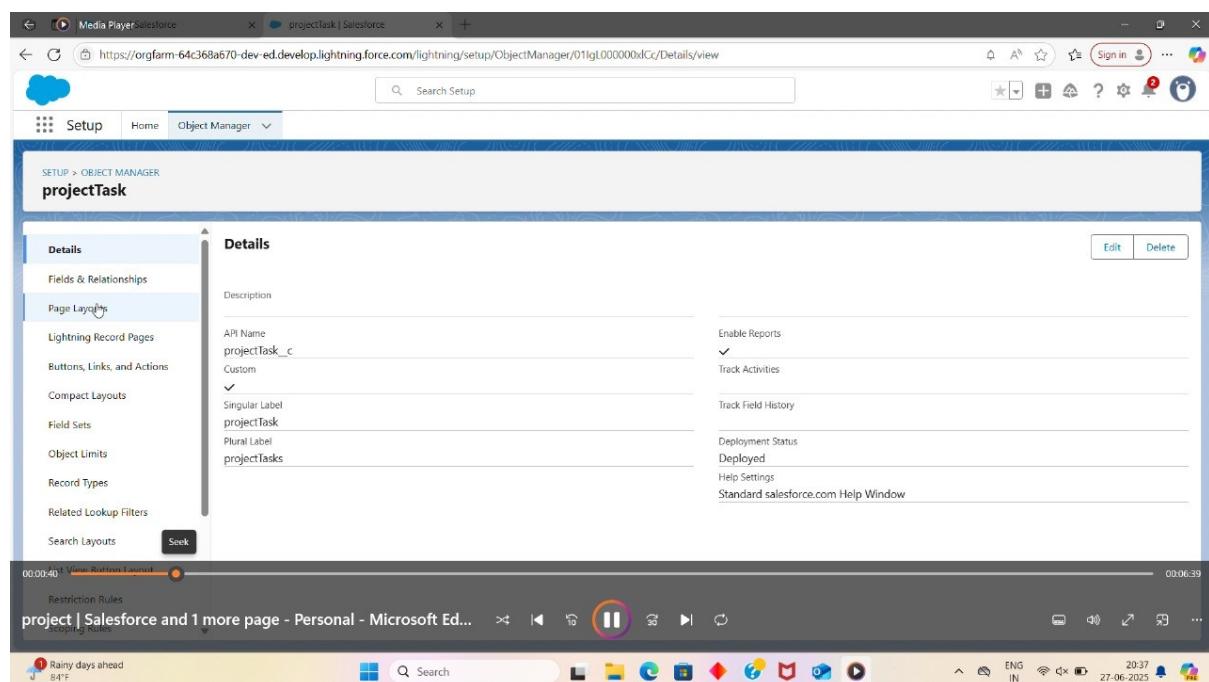
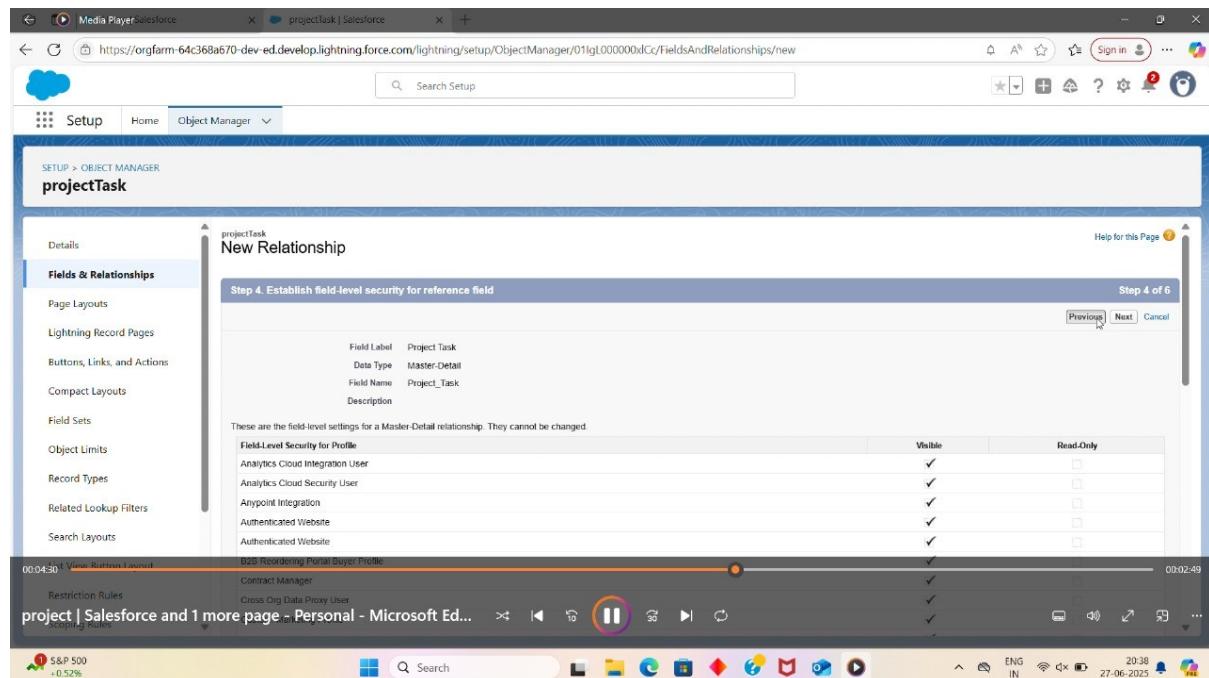
Object	Default	Current	Action
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
Voice Call	Private	Private	✓
Activation Target	Private	Private	✓
Activation Target Internal Organization Access	Private	Private	✓
Activation Target Platform	Private	Private	✓
Activation Target Platform Field Value	Private	Private	✓
Agent Work	Public Read Only	Private	✓
Alternative Payment Method	Private	Private	✓
Analytics User Attribute Function Token	Public Read Only	Private	✓
Appointment Invitation	Private	Private	✓
Approval Submission	Private	Private	✓

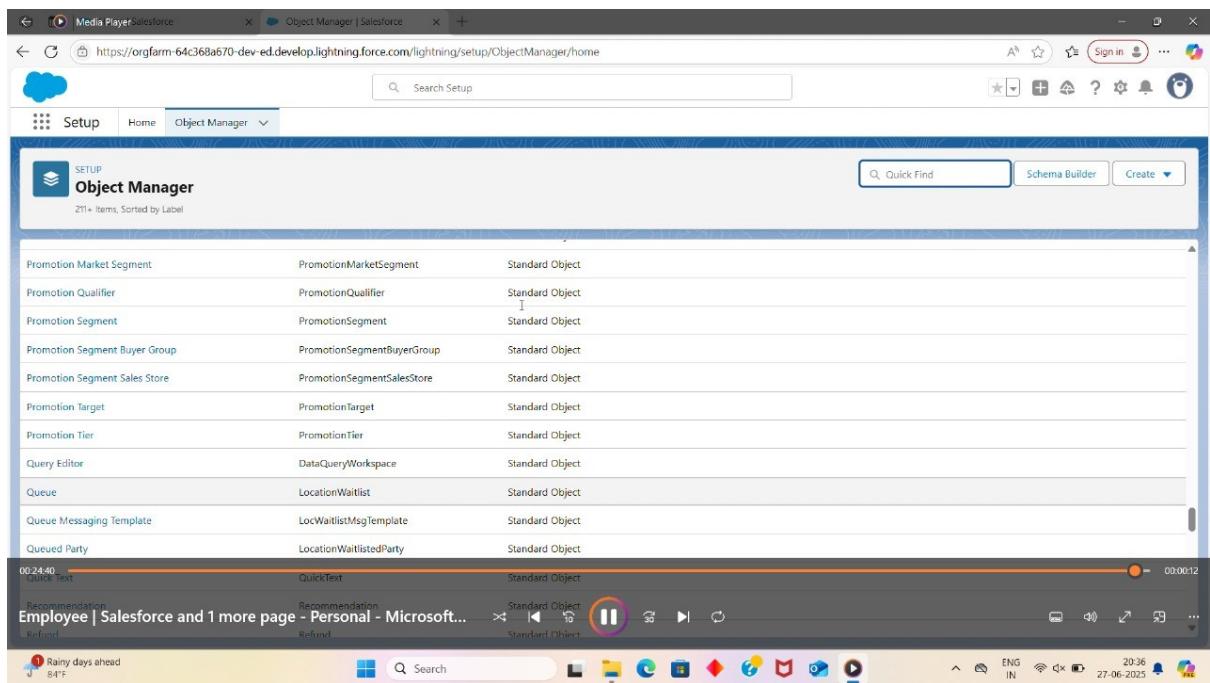
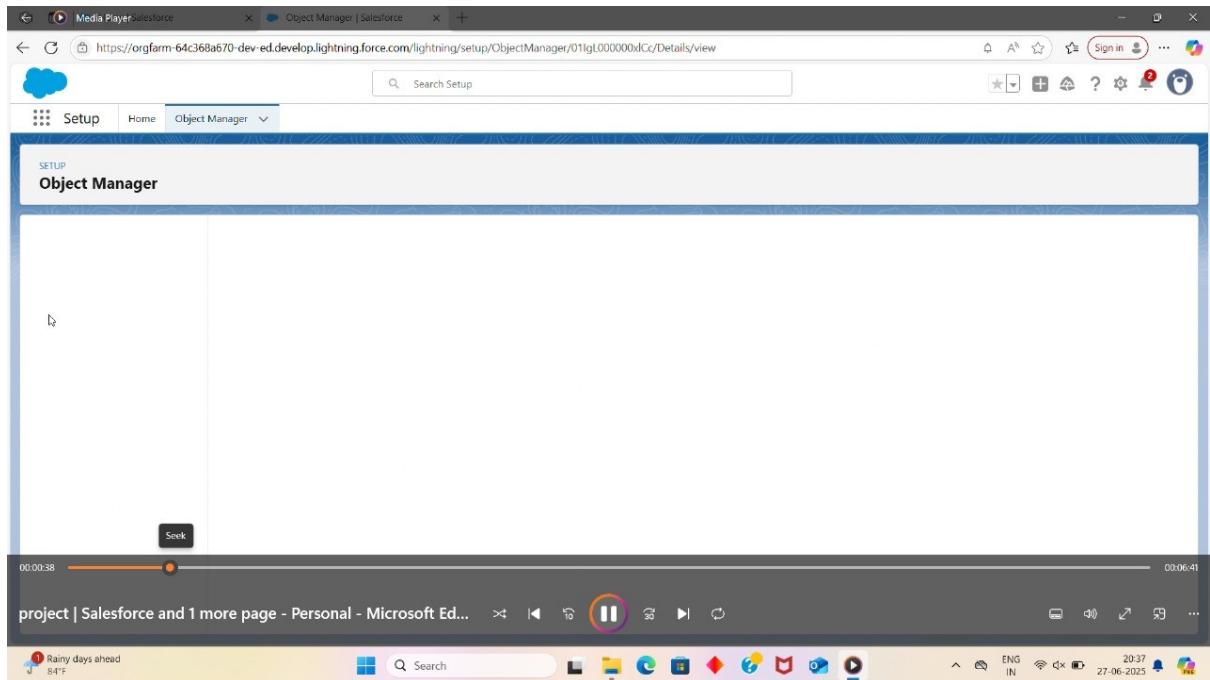
The screenshot shows the Salesforce Object Manager "New Custom Field" setup page. The left sidebar shows "SETUP > OBJECT MANAGER" and the object name "project". The main content area is titled "New Custom Field" and is on "Step 4. Add to page layouts" of 4. The form fields are:

Field Label	Project Status
Data Type	PICKLIST
Field Name	Project_Status
Description	(empty)

Below the form, it says: "Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout." There is a checkbox "Add Field" and a dropdown "Page Layout Name" containing "project Layout". At the bottom, it says "When finished, click Save & New to create more custom fields, or click Save if you are done." and buttons for Previous, Save & New, Save, and Cancel.

The taskbar at the bottom shows "Media Player" and "project | Salesforce and 1 more page - Personal - Microsoft Edge". The system tray shows battery level (~0.52%), signal strength, and the date/time "27-06-2025 20:37".





Media Player - Salesforce

https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000000dCc/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER projectTask

New Custom Field

Step 4 of 4

Field Label: Qualification
Data Type: Text
Field Name: Qualification
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

Add Field Page Layout Name
 projectTask Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

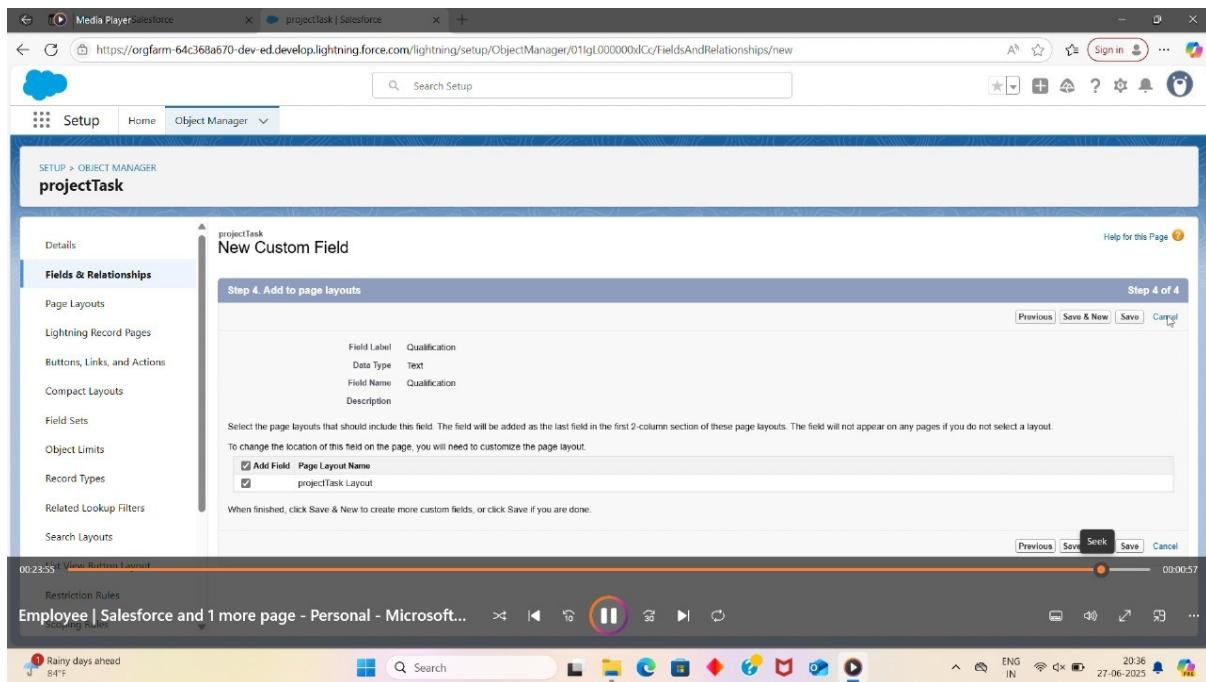
00:23:51 View Button Layout

Restriction Rules Employee | Salesforce and 1 more page - Personal - Microsoft...

Rainy days ahead 84°F

Search

ENG IN 20:36 27-06-2025



Media Player - Salesforce

https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000000dVx/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER Employee

New Relationship

Step 4 of 6

Field Label: Reports to
Data Type: Lookup
Field Name: Reports_to
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross-City Data Privacy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Marketing Profile	<input type="checkbox"/>	<input type="checkbox"/>
Custom Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

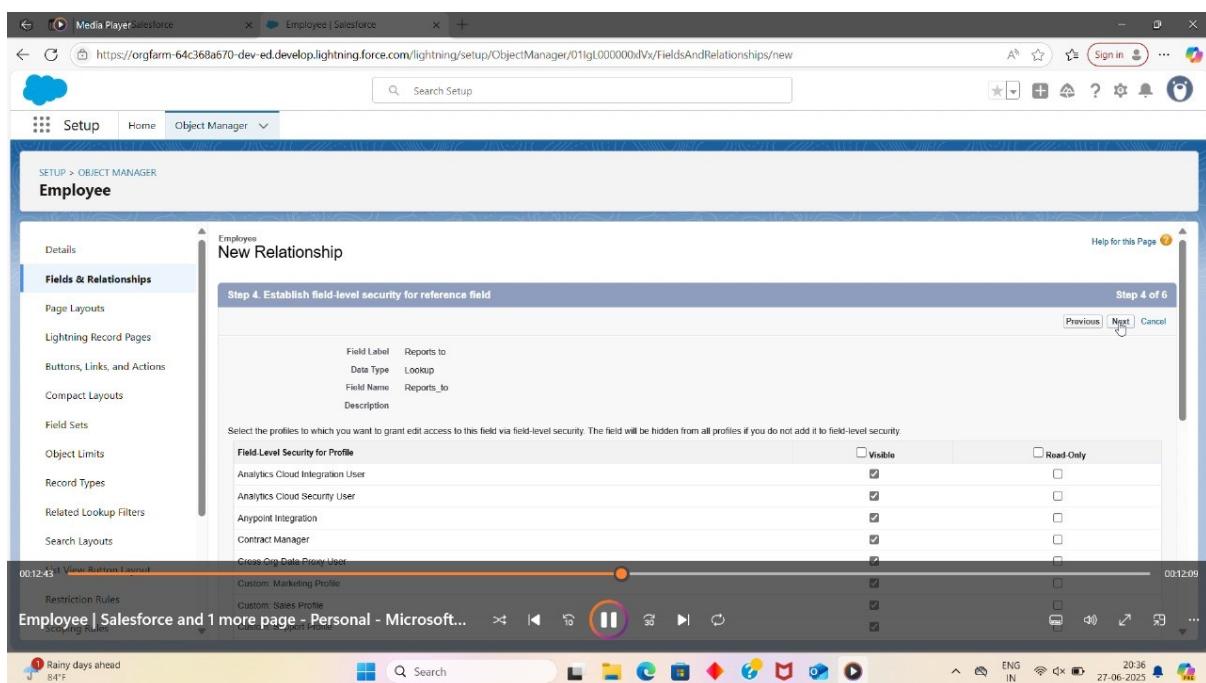
00:12:43 View Button Layout

Restriction Rules Employee | Salesforce and 1 more page - Personal - Microsoft...

Rainy days ahead 84°F

Search

ENG IN 20:36 27-06-2025



Media Player-Salesforce

Object Manager | Salesforce

https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

53+ items, Sorted by Label

Search Setup

Schema Builder Create

LABEL API NAME TYPE DESCRIPTION LAST MODIFIED DEPLOYED

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object		00:20:31	00:04:21
Agent Work	AgentWork	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Approval Submission	ApprovalSubmission	Standard Object			
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object			
Approval Workflow	ApprovalWorkflow	Standard Object			
Asset Action	AssetAction	Standard Object			

Employee | Salesforce and 1 more page - Personal - Microsoft...

00:20:31 00:04:21

Rainy days ahead 84°F

Search

Standard Objects

Seek

00:20:31 00:04:21

Employee | Salesforce and 1 more page - Personal - Microsoft...

ENG IN 20:36 27-06-2025

Media Player-Salesforce

Employee | Salesforce

https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01igL000000dVx/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER Employee

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label Gender

Values

Use global picklist value set

Enter values, with each value separated by a new line

Male
Female

Display values alphabetically, not in the order entered

Use first value as default value

Restrict picklist to the values defined in the value set

Field Name Gender

Description

00:10:28 00:14:24

Restriction Rules

Employee | Salesforce and 1 more page - Personal - Microsoft...

00:10:28 00:14:24

Rainy days ahead 84°F

Search

Standard Objects

00:10:28 00:14:24

Employee | Salesforce and 1 more page - Personal - Microsoft...

ENG IN 20:35 27-06-2025

Media Player - Salesforce

Employee | Salesforce

https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gL000000dVx/FieldsAndRelationships/new

Setup Home Object Manager

Employee

Employee New Custom Field

Step 4. Establish field-level security Step 4 of 6

Field Label: Age
Data Type: Formula
Field Name: Age
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

	Visible	Read Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AnyPoint Integration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross-Org Data Privacy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Previous Next Cancel

00:00:00 00:00:00 00:24:46

Employee | Salesforce and 1 more page - Personal - Microsoft...

00:00:45 00:00:00 00:17:34

Breaking news Supreme Court...

ENG IN 20:35 27-06-2025

Media Player - Salesforce

Employee | Salesforce

https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gL000000dVx/FieldsAndRelationships/new

Setup Home Object Manager

Employee

Employee New Custom Field

Step 2. Choose output type Step 2 of 6

Field Label: Age Field Name: Age

Add to existing custom report types that contain this entry

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value.
Example: TODAY() > CloseDate

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: Gross Margin = Amount - Cost_C

Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: Reminder Date = CloseDate + 7

Decimal Calculate a decimal, for example, by adding a number of hours or days to another date/time.
Example: Next = NOW() + 1

Number Calculate a numeric value.
Example: Fahrenheit = Celsius * 9/5 + 32

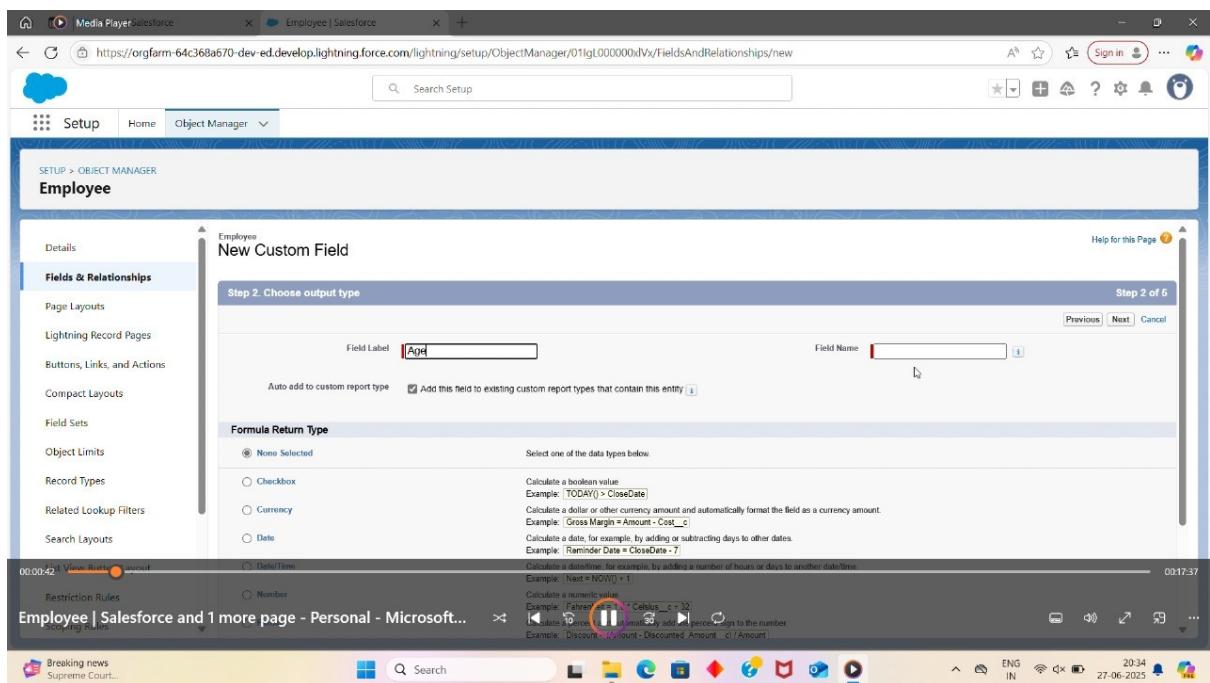
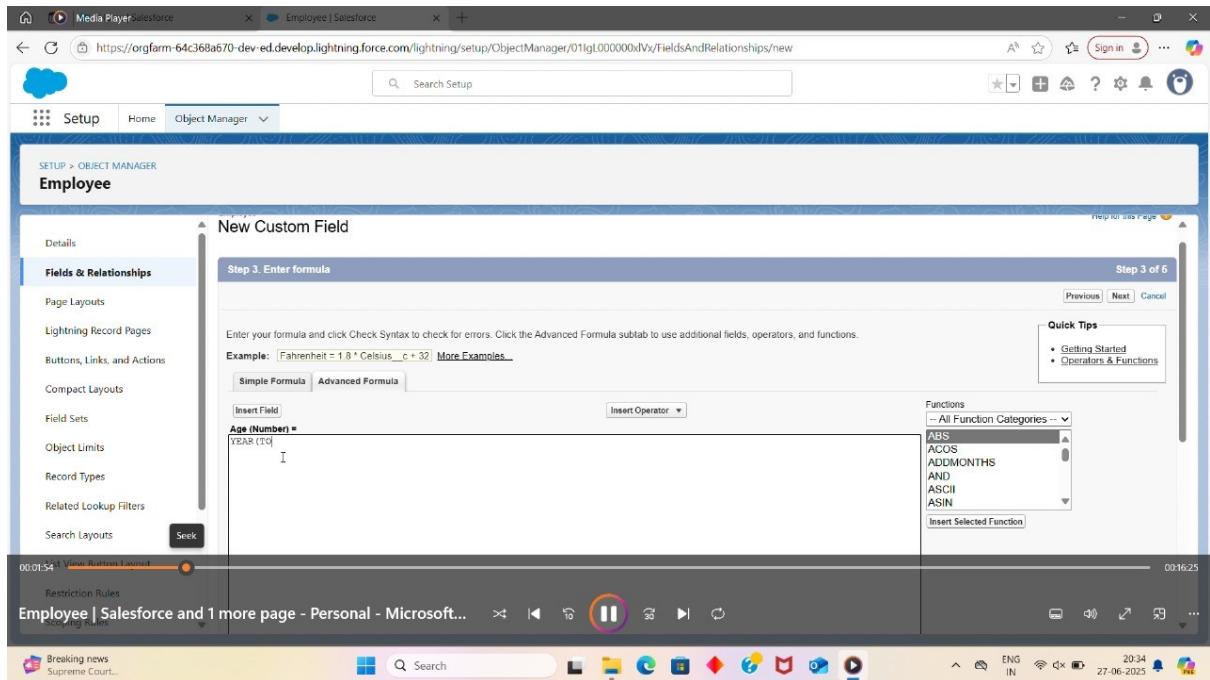
00:00:45 00:00:00 00:17:34

Employee | Salesforce and 1 more page - Personal - Microsoft...

00:00:45 00:00:00 00:17:34

Breaking news Supreme Court...

ENG IN 20:34 27-06-2025



Media Player - Salesforce

https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000000dCc/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER projectTask

Details

Field Label: Project_Task

Field Name: Project_Task

Description:

Help Text:

Child Relationship Name: projectTasks

Sharing Setting: Select the minimum access level required on the Master record to create, edit, or delete related Detail records.

Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

ReadWrite: Allows users with at least ReadWrite access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: Child records can be reparented to other parent records after they are created.

Auto add to custom report type: Add this field to existing custom report types that contain this entity.

Lookup Filter: Optionally, create a filter to limit the records available to users in the lookup field. Tell me more! Show Filter Settings

Restriction Rules

projectTask | Salesforce and 1 more page - Personal - Microsoft Edge

00:04:37 View Button Layout

00:02:42

S&P 500 +0.52%

Search

ENG IN 20:38 27-06-2025

Media Player - Salesforce

https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000000dVx/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER Employee

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

Step 3 of 6

New Custom Field

Step 3. Enter formula

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Fahrenheit = 1.8 * Celsius + 32 | More Examples

Simple Formula Advanced Formula

Age (Number) = `YEAR(TODAY())`

Insert Field Insert Operator

Functions

All Function Categories

Abs Acos AddMonths And Ascii Asin

Insert Selected Function

Quick Tips

- Getting Started
- Operators & Functions

00:01:57 View Button Layout

08:16:22

Employee | Salesforce and 1 more page - Personal - Microsoft Edge

00:01:57

Breaking news Supreme Court...

Search

ENG IN 20:34 27-06-2025

The screenshot shows the Salesforce Sharing Settings page. The left sidebar has a search bar and navigation links for Security, Guest User Sharing Rule Access, Report, and Sharing Settings. A message says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Sharing Settings" and lists various objects with their sharing settings:

Object	Sharing Rule	Action
User Provisioning Request	Private	✓
Walllist	Private	✓
Web Cart Document	Private	✓
Work Order	Private	✓
Work Plan	Private	✓
Work Plan Template	Private	✓
Work Step Template	Private	✓
Work Type	Private	✓
Work Type Group	Public ReadWrite	✓
Assess	Public ReadWrite	✓
Assess Service	Private	✓
Employee	Private	✓
project	Private	✓
projectTask	Controlled by Parent	✓

Below this is a section for "Other Settings" with checkboxes for "Manager Groups" and "Secure guest user record access". There is also a note about "Require permission to view record names in lookup fields".

The screenshot shows the Salesforce Object Manager page for the Employee object. The left sidebar has a search bar and navigation links for 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, and Scoping Rules. A progress bar at the bottom indicates "00:03:31 Object Access".

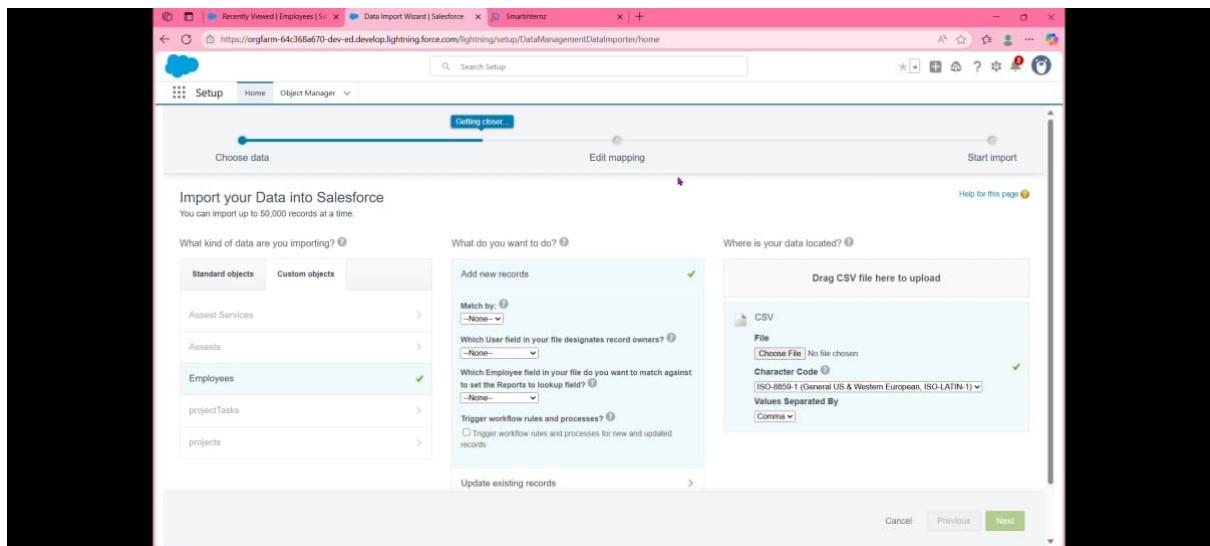
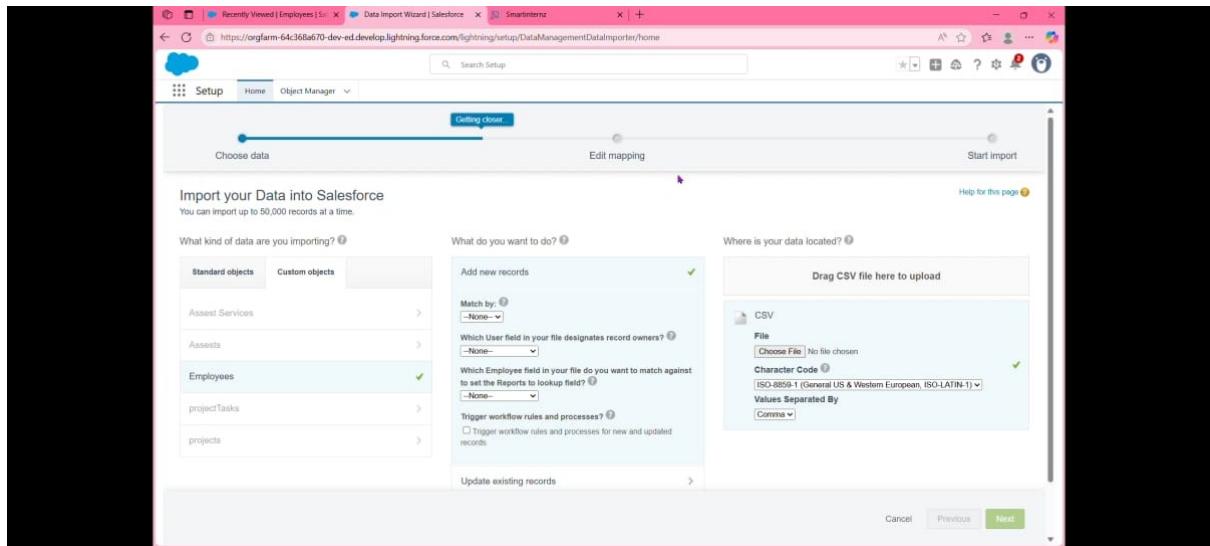
The main content area is titled "Employee New Custom Field" and is on "Step 2. Enter the details". The form fields are:

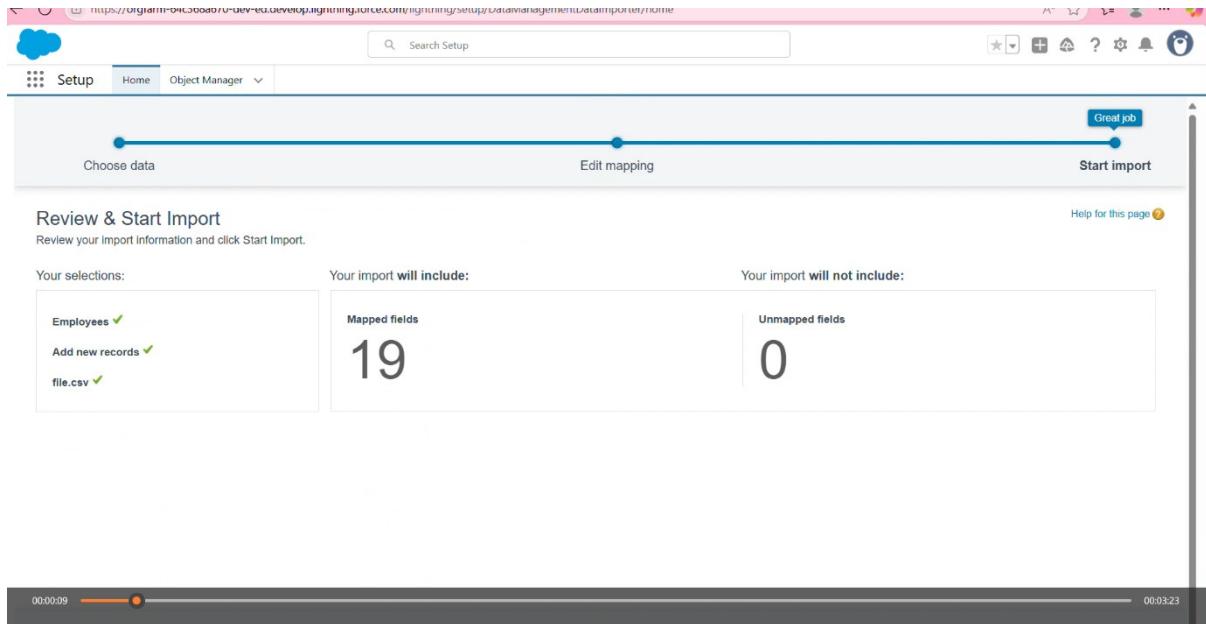
- Field Label: Joining date
- Field Name: Joining_date
- Description: (empty)
- Help Text: (empty)
- Required: Always require a value in this field in order to save a record
- Auto add to custom report type: Add this field to existing custom report types that contain this entity
- Default Value: Show Formula Editor

A note at the bottom of the "Default Value" section says: "Use formula syntax: Enclose text and picklist value API names in double quotes ('The_Label'), include numbers without quotes (25), show percentages as decimals (.01), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__Name.FieldName__c".

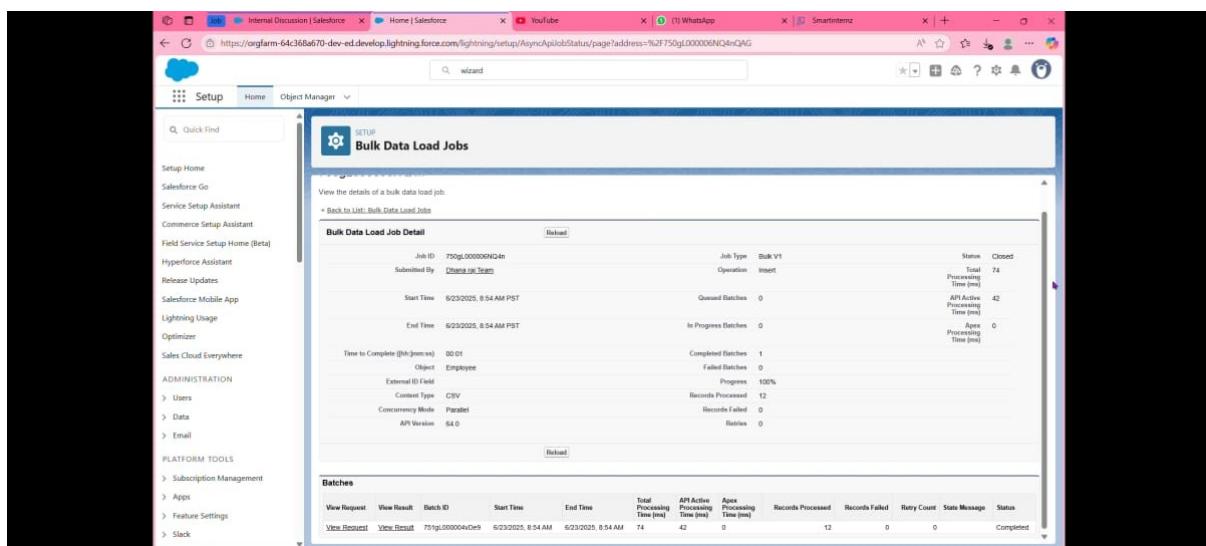
Step :

Import data Wizard





Selected the file in the csv format



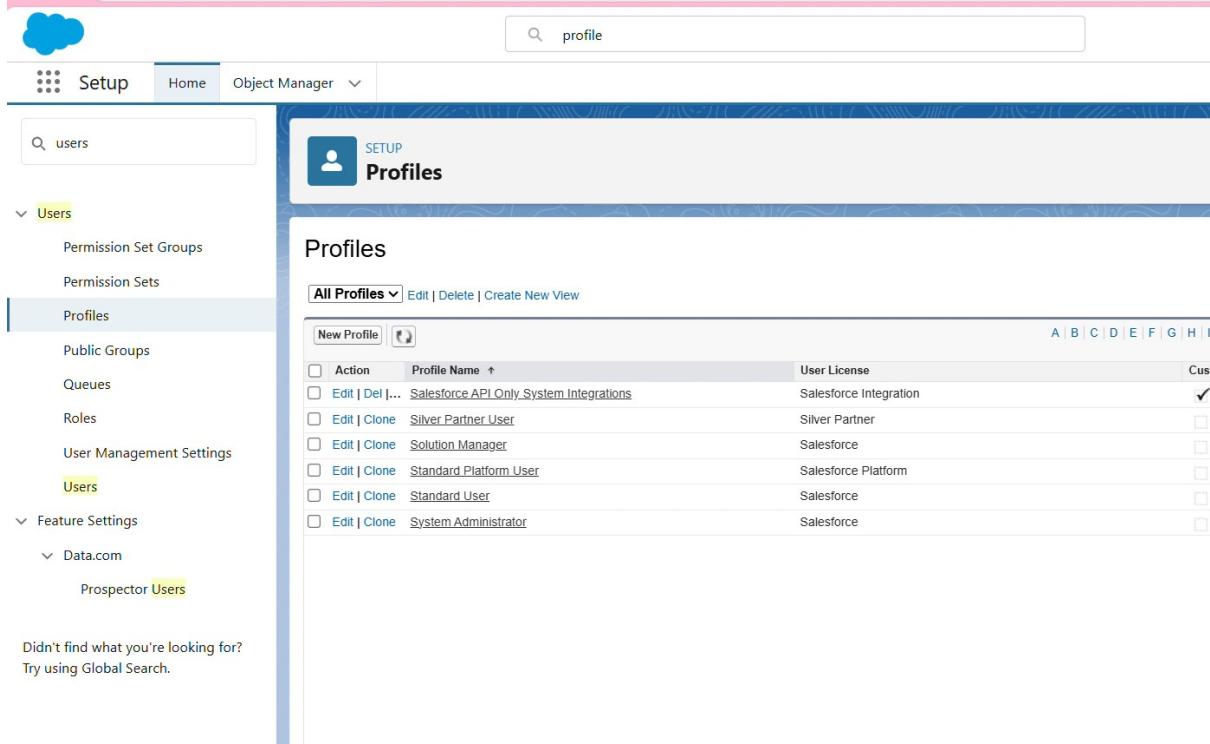
sucessfully imported data without any errors

step :

profiles

(HR profile ,manag profile,Employee profile)

https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

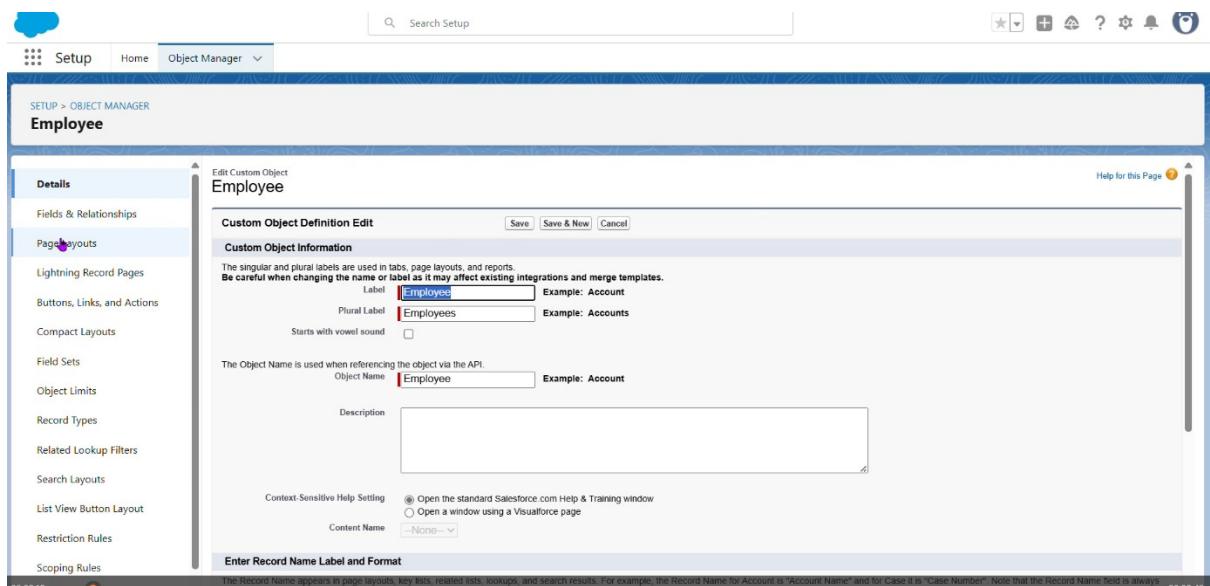


The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar has a 'Setup' icon and navigation links for Home, Object Manager, and various User-related sections like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users (Prospector Users). A search bar at the top right contains the word 'profile'. The main content area is titled 'Profiles' and shows a table of existing profiles. The table columns are 'Action', 'Profile Name', and 'User License'. The profiles listed are:

Action	Profile Name	User License
Edit Del	Salesforce API Only System Integrations	Salesforce Integration
Edit Clone	Silver Partner User	Silver Partner
Edit Clone	Solution Manager	Salesforce
Edit Clone	Standard Platform User	Salesforce Platform
Edit Clone	Standard User	Salesforce
Edit Clone	System Administrator	Salesforce

A navigation bar at the bottom right includes links for A, B, C, D, E, F, G, H, I, and a 'Customize' link.

https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Employee



The screenshot shows the Salesforce Setup interface for managing Custom Objects. The left sidebar has a 'Setup' icon and navigation links for Object Manager, followed by a detailed list of object configuration tabs: Details, Fields & Relationships, Page Layouts (which is selected), 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 Scoping Rules. The main content area is titled 'Edit Custom Object Employee'. It shows the 'Custom Object Definition Edit' screen with fields for Label (Employee), Plural Label (Employees), Example (Account), Starts with vowel sound (unchecked), Object Name (Employee), Example (Account), Description (empty), and Context-Sensitive Help Setting (radio buttons for standard Help & Training window or Visualforce page). A note at the bottom states: 'The Record Name appears in page layouts, key lists, related lists, reports, and search results. For example, the Record Name for Account is "Account Name" and for Contact is "Contact Number". Not all objects support Record Name. For more information, see Record Name.' A 'Help for this Page' link is also present.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER Employee'. On the left, a sidebar lists various configuration options under 'Page Layouts'. The central panel is titled 'Create New Page Layout' and contains a note about cloning existing layouts. It shows 'Existing Page Layout' set to 'Employee Layout' and 'Page Layout Name' set to 'On site Employee Layout'. Buttons for 'Save' and 'Cancel' are at the bottom.

Created Employment layout

The screenshot shows the Salesforce Setup interface with the same setup as the previous screenshot, but now displaying the 'On site Employee Layout' for the Employee object. The central panel shows the layout configuration with fields like Employee Id, Employee Name, Date of Birth, Age, Gender, Reports to, and Qualification. Buttons for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', and 'Redo' are at the top. A 'Layout Properties' tab is also visible. The status bar at the bottom shows '00:03:51 Object Access' on the left and '00:09:13' on the right.

The screenshot shows the Salesforce Setup interface for the Employee object. The left sidebar lists various setup categories like Details, Fields & Relationships, and Page Layouts. The Page Layouts section is selected. A modal window titled 'Section Properties' is open, prompting for a 'Section Name' (set to 'New Section') and 'Display Section Header On' (checkboxes for 'Detail Page' and 'Edit Page' are checked). Below this, layout options for 'Layout' (2-Column selected) and 'Tab-key Order' (Left-Right selected) are shown. The background shows the Employee object's page layout with fields like Employee ID, Employee Name, and Date of Birth.

Again created new section

This screenshot is similar to the previous one but shows a second 'Section Properties' modal window. The 'Section Name' is 'New Section' and 'Display Section Header On' is checked for both 'Detail Page' and 'Edit Page'. The layout and tab-key order settings are identical. The background shows the same Employee object page layout with fields like Employee ID, Employee Name, and Date of Birth.

Added allowance

Employee

Page Layouts

Section Properties

Section Name: Allowances

Display Section Header On: Detail Page

Layout: 2-Column

Tab-key Order: Left-Right

Created all fields

Created employee layout and on _site layout

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Employee Layout	Dhana raj Team, 6/20/2025, 10:38 PM	Dhana raj Team, 6/22/2025, 4:18 AM
On site Employee Layout	Dhana raj Team, 6/22/2025, 8:16 AM	Dhana raj Team, 6/22/2025, 8:23 AM

Page layouts:

The screenshot shows the Salesforce Object Manager interface for the Employee object. The left sidebar has 'Page Layouts' selected. The main area displays a table titled 'Page Layouts' with three items:

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Employee Layout	Dhana raj Team, 6/20/2025, 10:38 PM	Dhana raj Team, 6/22/2025, 4:18 AM
On site Employee Layout	Dhana raj Team, 6/22/2025, 8:16 AM	Dhana raj Team, 6/22/2025, 8:23 AM
Remote Employee	Dhana raj Team, 6/22/2025, 8:34 AM	Dhana raj Team, 6/22/2025, 8:34 AM

The screenshot shows the Salesforce Object Manager interface for the Employee object, specifically in the layout editor. The left sidebar has 'Page Layouts' selected. The main area shows the 'Layout Properties' tab is active. The 'Fields' section lists fields like Buttons, Quick Actions, Mobile & Lightning Actions, etc. The 'Allowances' section shows checkboxes for cab Allowance, Food Allowances, and wifi Allowances, all of which are checked. Below that, there are sections for Personal Information and Information.

Chatter Group:

New Group

Name * = Required Information
Internal Discussion

Description
This is created on the request of coo of the organization, for teams and users to have as internal discussion among them and have a clear idea about the on going activities

Information

Salesforce Sans 12 B I U Text Color Font Size Font Style Font Weight Font Family

Save & Next

Chatter Engagement

Group Details

Description
This is created on the request of coo of the organization, for teams and users to have as internal discussion among them and have a clear idea about the on going activities

Information

Group Email
0F9gJ.0000000dhjSAQ@post.gI-Snj0Quak.can98.chatte.r.salsforce.com

Owner
Dhana raj Team

Manage Members

Search People... Seek

Member Name Member Role

No results here View More

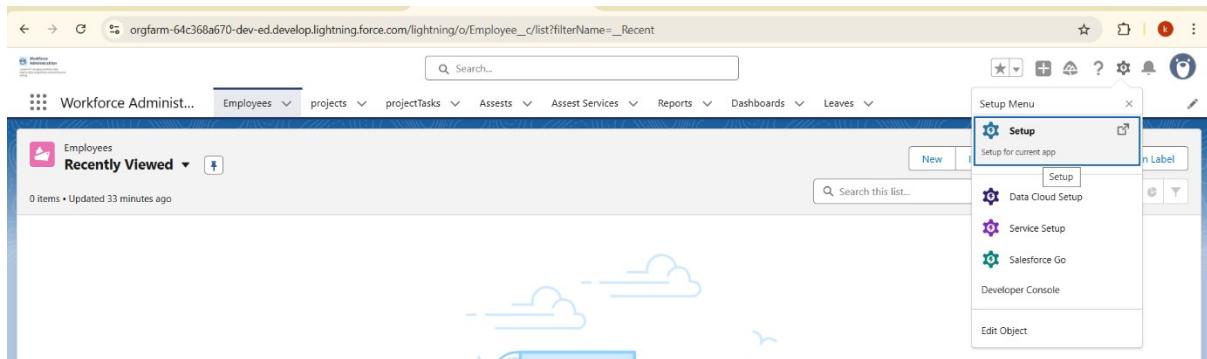
finally created Chatter group

6.14 Record Types:

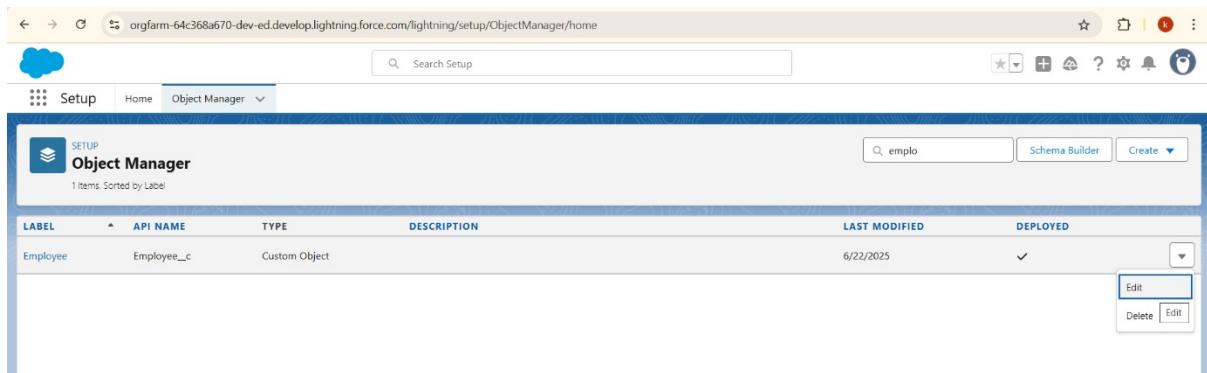
Creating On Site Employee Record Type

To Create a Record Type:

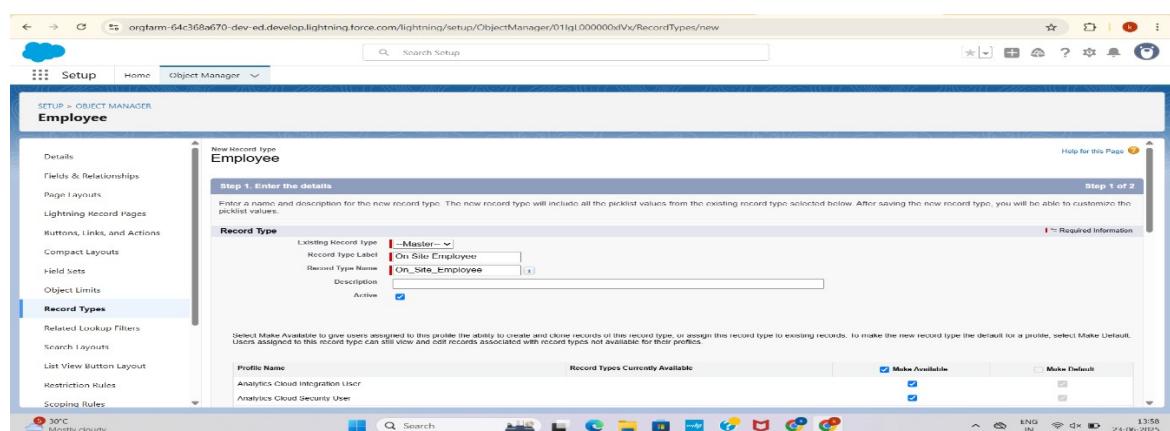
Go to Setup



Click on Object Manager and Search for Object Employee then click on edit from drop down



From the panel click Record Types then Select New and Give Record Type Label as “On Site Employee” and make it active



Uncheck for “Make Available”.

Profile Name	Record Types Currently Available	Make Available	Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter Free User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter Moderator User		<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager		<input type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User		<input type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile		<input type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile		<input type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile		<input type="checkbox"/>	<input type="checkbox"/>
Einstein Agent User		<input type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User		<input type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User		<input type="checkbox"/>	<input type="checkbox"/>
Guest User		<input type="checkbox"/>	<input type="checkbox"/>
Identity User		<input type="checkbox"/>	<input type="checkbox"/>
Manager		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User		<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - API Only Integrations		<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce		<input type="checkbox"/>	<input type="checkbox"/>
new Remote Employee		<input type="checkbox"/>	<input type="checkbox"/>
On site Employee		<input type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User		<input type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User		<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User		<input type="checkbox"/>	<input type="checkbox"/>
Read Only		<input type="checkbox"/>	<input type="checkbox"/>
Remote Employee		<input type="checkbox"/>	<input type="checkbox"/>
Salesforce API Only System Integrations		<input type="checkbox"/>	<input type="checkbox"/>
Silver Partner User		<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager		<input type="checkbox"/>	<input type="checkbox"/>
Standard Platform User		<input type="checkbox"/>	<input type="checkbox"/>
Standard User		<input type="checkbox"/>	<input type="checkbox"/>
System Administrator		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work.com Only User		<input type="checkbox"/>	<input type="checkbox"/>

Scroll down and check for the Manager & System Administrator profile and click on Next.

Profile Name	Record Types Currently Available	Make Available	Make Default
Identity User		<input type="checkbox"/>	<input type="checkbox"/>
Manager		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User		<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - API Only Integrations		<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce		<input type="checkbox"/>	<input type="checkbox"/>
new Remote Employee		<input type="checkbox"/>	<input type="checkbox"/>
On site Employee		<input type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User		<input type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User		<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User		<input type="checkbox"/>	<input type="checkbox"/>
Read Only		<input type="checkbox"/>	<input type="checkbox"/>
Remote Employee		<input type="checkbox"/>	<input type="checkbox"/>
Salesforce API Only System Integrations		<input type="checkbox"/>	<input type="checkbox"/>
Silver Partner User		<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager		<input type="checkbox"/>	<input type="checkbox"/>
Standard Platform User		<input type="checkbox"/>	<input type="checkbox"/>
Standard User		<input type="checkbox"/>	<input type="checkbox"/>
System Administrator		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work.com Only User		<input type="checkbox"/>	<input type="checkbox"/>

Select “Apply a different layout for each profile”, and change page layout to On Site Employee Layout for manager profile and System Administrator.

[orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000000dVx/RecordTypes/new](#)

SETUP > OBJECT MANAGER
Employee

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

New Record Type
Employee

Step 2. Assign page layouts Step 2 of 2

Employee Record Type: On Site Employee
Record Type Name: On_Site_Employee
Description:

Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.

Apply one layout to all profiles Apply a different layout for each profile

Profile: Page Layout

Analytics Cloud Integration User	Employee Layout
Analytics Cloud Security User	Employee Layout
Anypoint Integration	Employee Layout
Chatter External User	Employee Layout
Chatter Free User	Employee Layout
Chatter Moderator User	Employee Layout
Contract Manager	Employee Layout
Customer Data Owner User	Employee Layout

[orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000000dVx/RecordTypes/new](#)

SETUP > OBJECT MANAGER
Employee

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

Elmstien Agent User	Employee Layout
Force.com - App Subscription User	Employee Layout
Force.com - Free User	Employee Layout
Gold Partner User	Employee Layout
HR	Employee Layout
Identity User	Employee Layout
Manager	On site Employee Layout
Marketing User	Employee Layout
Minimum Access - API Only Integrations	Employee Layout
Minimum Access - Salesforce	Employee Layout
new Remote Employee	Employee Layout
On site Employee	Employee Layout
Partner App Subscription User	Employee Layout
Partner Community Login User	Employee Layout
Partner Community User	Employee Layout
Read Only	Employee Layout
Remote Employee	Employee Layout
Salesforce API Only System Integrations	Employee Layout
Silver Partner User	Employee Layout
Solution Manager	Employee Layout
Standard Platform User	Employee Layout
Standard User	Employee Layout
System Administrator	On site Employee Layout
Work.com Only User	Employee Layout

Save

[orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000000dVx/RecordTypes/012g1000001NAT/view](#)

SETUP > OBJECT MANAGER
Employee

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

Record Type: **On Site Employee**
Record Type Label: On Site Employee
Record Type Name: On_Site_Employee
Namespace Prefix:
Description:
Created By: Dhana Raj Team, 6/23/2025, 1:34 AM

Active:

Modified By: Dhana Raj Team, 6/23/2025, 1:34 AM

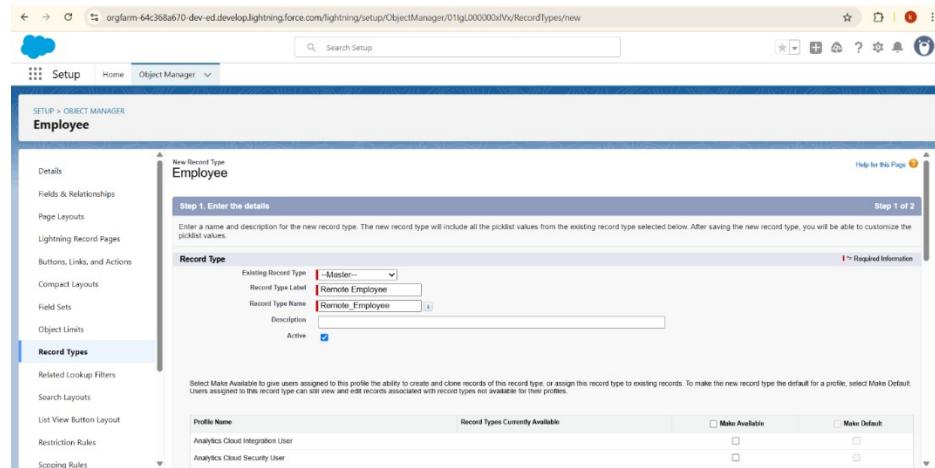
Picklists Available for Editing

Action: Field	Modified Date: 6/23/2025, 1:34 AM
Edit: Gender	6/23/2025, 1:34 AM
Edit: mode of work	

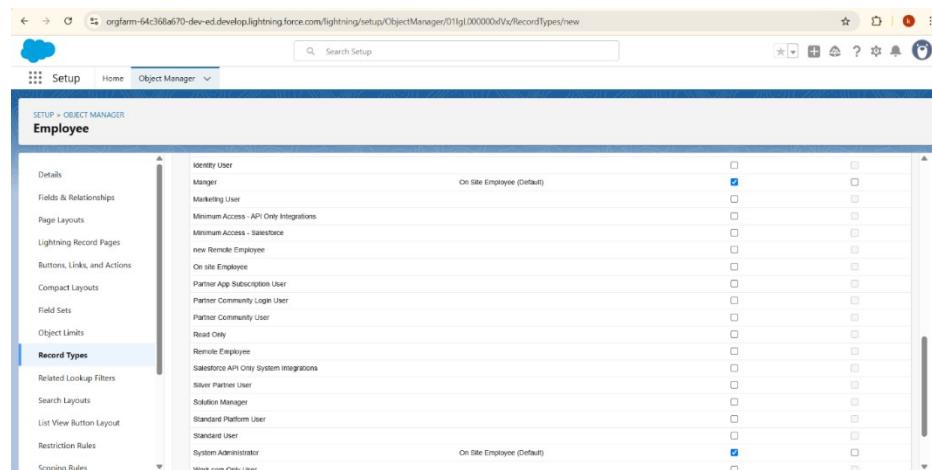
Creating Remote Employee Record Type

To create a Record Type

Go to setup and Click on Object Manager and Search for Object Employee then click on edit from drop down ,From the panel click Record Types then Select New and Give Record Type Label as “Remote Employee” and make it active.



Scroll down and check for the Manager & System Administrator profile and click on Next.



Select “Apply a different layout for each profile”, and change page layout to Remote Employee Layout for manager profile and System Administrator.

Employee Record Type: Remote Employee
Record Type Name: Remote_Employee

Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.

Apply one layout to all profiles Select Page Layout

User Profile	Page Layout
Analytics Cloud Integration User	Employee Layout
Analytics Cloud Security User	Employee Layout
AnyPoint Integration	Employee Layout
Chatter External User	Employee Layout
Chatter Free User	Employee Layout
Chatter Internal User	Employee Layout
Contact Manager	Employee Layout
Cross Org Data Proxy User	Employee Layout
Custom: Marketing Profile	Employee Layout
Custom: Sales Profile	Employee Layout

User Profile	Page Layout
HR	Employee Layout
Identity User	Employee Layout
Manager	Remote Employee Layout
Marketing User	Employee Layout
Minimum Access - API Only Integrations	Employee Layout
Minimum Access - Salesforce	Employee Layout
New Remote Employee	Employee Layout
On Site Employee	Employee Layout
Partner App Subscription User	Employee Layout
Partner Community Log In User	Employee Layout
Partner Community User	Employee Layout
Read Only	Employee Layout
Recruiting Employee	Employee Layout
Salesforce API Only System Integrations	Employee Layout
Silver Partner User	Employee Layout
Solution Manager	Employee Layout
Standard Platform User	Employee Layout
Standard User	Employee Layout
System Administrator	Remote Employee Layout
Work.com Only User	Employee Layout

Click on Save

6.15 Permission Sets

To create a report with Report Type Employee

Go to the app , click on the reports tab and Click New Report Select report type from category or from report type panel or from search panel --> click on start report.

Category: All

Select a Report Type: Employees

Report Type Name: Employees

Category: Standard

Details:

- Employees** Standard Report Type
- Start Report**
- Fields (33)**
- Created By You** No Reports Yet
- Created By Others** No Reports Yet
- Objects Used in Report Type**
 - Owner
 - Employee

Add fields from left pane

Employee Name	Employee ID	Reports to	Login Time	Logout Time	mode of work	LinkedIn Profile
1. Jones	a0Ng.02000099e5-b	-	-	-	- Remote	https://www.linkedin.com/in/jones
2. Benjamin	a0Ng.02000099e5-c	-	-	-	- Remote	https://www.linkedin.com/in/benjamin
3. Irina	a0Ng.02000099e5-d	-	-	-	- Remote	https://www.linkedin.com/in/irina
4. Olivia	a0Ng.02000099e5-e	-	-	-	- Remote	https://www.linkedin.com/in/olivia
5. Sophia	a0Ng.02000099e5-f	-	-	-	- Remote	https://www.linkedin.com/in/sophia
6. Isabella	a0Ng.02000099e5-g	-	-	-	- Remote	https://www.linkedin.com/in/isabella
7. Jackie Chan	a0Ng.02000099e5-h	-	1/1/2025, 1:00 AM	1/1/2025, 9:00 AM	On site	https://www.linkedin.com/in/jackiechan
8. James	a0Ng.02000099e5-i	-	-	-	- Remote	https://www.linkedin.com/in/james
9. Kiyomari	a0Ng.02000099e5-j	-	-	-	- Remote	https://www.linkedin.com/in/kiyomari
10. Alexander	a0Ng.02000099e5-k	-	1/1/2025, 1:00 AM	1/1/2025, 9:00 AM	On site	https://www.linkedin.com/in/alexander
11. William	a0Ng.02000099e5-l	-	1/1/2025, 1:00 AM	1/1/2025, 9:00 AM	On site	https://www.linkedin.com/in/william
12. Ethan	a0Ng.02000099e5-m	-	1/1/2025, 1:00 AM	1/1/2025, 9:00 AM	On site	https://www.linkedin.com/in/ethan
13. Irina	a0Ng.02000099e5-n	-	-	-	- Remote	https://www.linkedin.com/in/irinam
14. Olivia	a0Ng.02000099e5-o	-	-	-	- Remote	https://www.linkedin.com/in/oliviam
15. Sophia	a0Ng.02000099e5-p	-	-	-	- Remote	https://www.linkedin.com/in/sophiam
16. Isabella	a0Ng.02000099e5-q	-	1/1/2025, 1:00 AM	1/1/2025, 9:00 AM	On site	https://www.linkedin.com/in/isabellam
17. Amelia	a0Ng.02000099e5-r	-	1/1/2025, 1:00 AM	1/1/2025, 9:00 AM	On site	https://www.linkedin.com/in/amelia

Save or run it

Employee Name	Employee ID	Reports to	Login Time	Logout Time	mode of work	LinkedIn Profile
1. Elizabeth	a0Qg.02000099e5-2	-	-	-	- Remote	https://www.linkedin.com/in/elizabeth
2. Anna	a0Qg.02000099e5-1	-	1/1/2025, 1:00 AM	1/1/2025, 9:00 AM	On site	https://www.linkedin.com/in/anna
3. Isabella	a0Qg.02000099e5-3	-	1/1/2025, 1:00 AM	1/1/2025, 9:00 AM	On site	https://www.linkedin.com/in/isabella
4. Sophia	a0Qg.02000099e5-4	-	-	-	- Remote	https://www.linkedin.com/in/sophia
5. Olivia	a0Qg.02000099e5-5	-	-	-	- Remote	https://www.linkedin.com/in/olivia
6. Emma	a0Qg.02000099e5-6	-	-	-	- Remote	https://www.linkedin.com/in/emma
7. Ethan	a0Qg.02000099e5-7	-	1/1/2025, 1:00 AM	1/1/2025, 9:00 AM	On site	https://www.linkedin.com/in/ethan
8. William	a0Qg.02000099e5-8	-	1/1/2025, 1:00 AM	1/1/2025, 9:00 AM	On site	https://www.linkedin.com/in/william
9. Alexander	a0Qg.02000099e5-9	-	1/1/2025, 1:00 AM	1/1/2025, 9:00 AM	On site	https://www.linkedin.com/in/alexander
10. Benjamin	a0Qg.02000099e5-10	-	-	-	- Remote	https://www.linkedin.com/in/benjamin
11. James	a0Qg.02000099e5-11	-	-	-	- Remote	https://www.linkedin.com/in/james
12. Jackie Chan	a0Qg.02000099e5-12	-	1/1/2025, 1:00 AM	1/1/2025, 9:00 AM	On site	https://www.linkedin.com/in/jackiechan
13. Elizabeth	a0Qg.02000099e5-13	-	-	-	- Remote	https://www.linkedin.com/in/elizabeth
14. Sophia	a0Qg.02000099e5-14	-	-	-	- Remote	https://www.linkedin.com/in/sophia
15. Olivia	a0Qg.02000099e5-15	-	-	-	- Remote	https://www.linkedin.com/in/olivia
16. Emma	a0Qg.02000099e5-16	-	-	-	- Remote	https://www.linkedin.com/in/emma
17. Benjamin	a0Qg.02000099e5-17	-	-	-	- Remote	https://www.linkedin.com/in/benjamin
18. James	a0Qg.02000099e5-18	-	-	-	- Remote	https://www.linkedin.com/in/james

To create a report with Report Type Employees with Project Tasks and Projects
Go to the app , click on the reports tab and Click New Report Select report type from category or from report type panel or from search panel --> click on start report.

Add fields from left pane.

Save or run it.

To create a report with Report Type Employees with Assets.

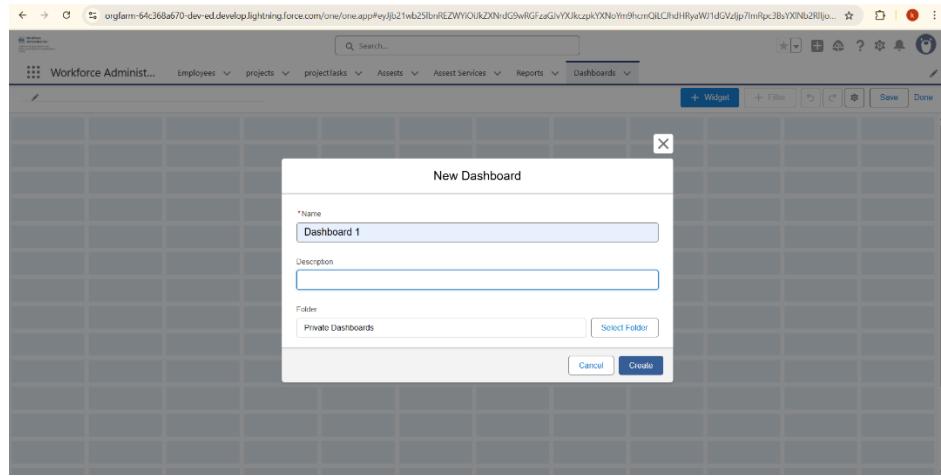
Go to the app , click on the reports tab and Click New Report Select report type from category or from report type panel or from search panel --> click on start report.

Add fields from left pane.

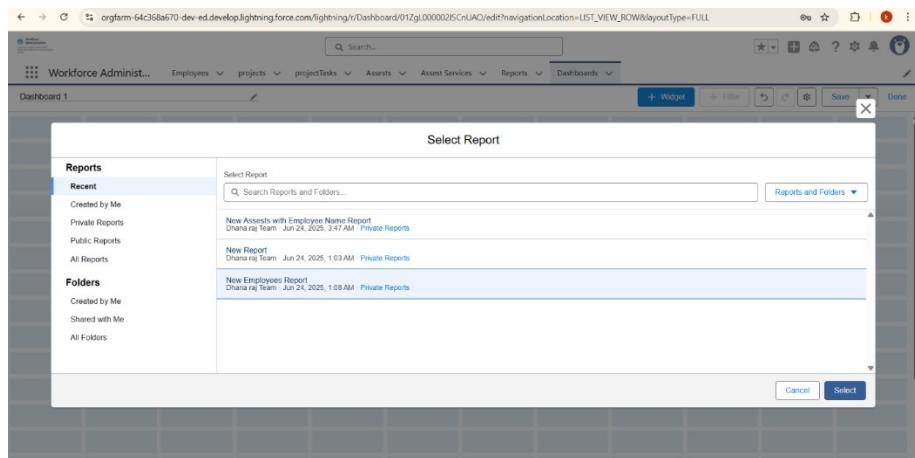
Save or Run it

6.16 Dashboards

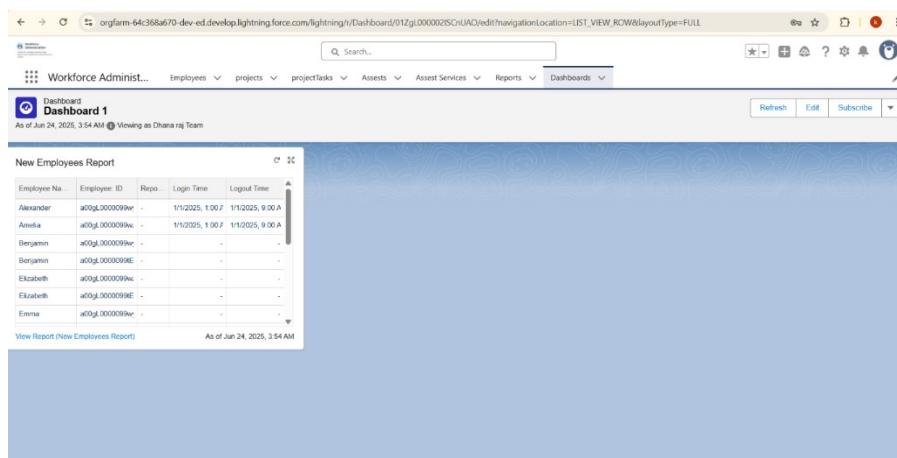
Create a Dashboard.
click on the Dashboards tabs and click on New Dashboard. Give a Name and click on Create.



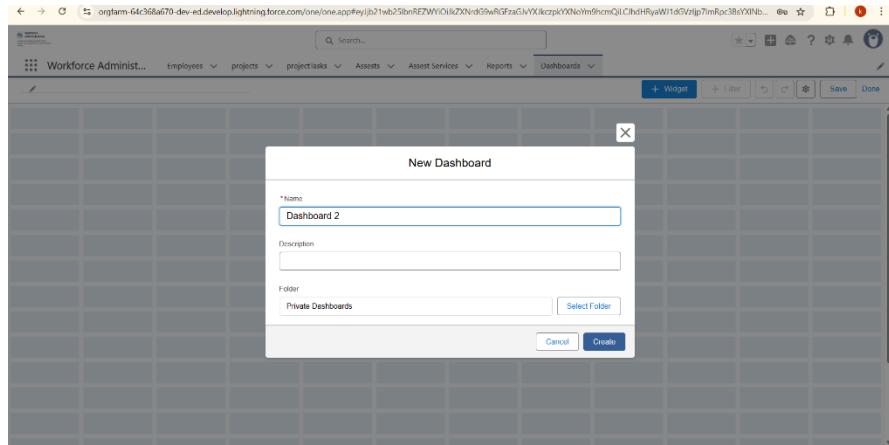
Select add Widget and Select a Report and click on select.



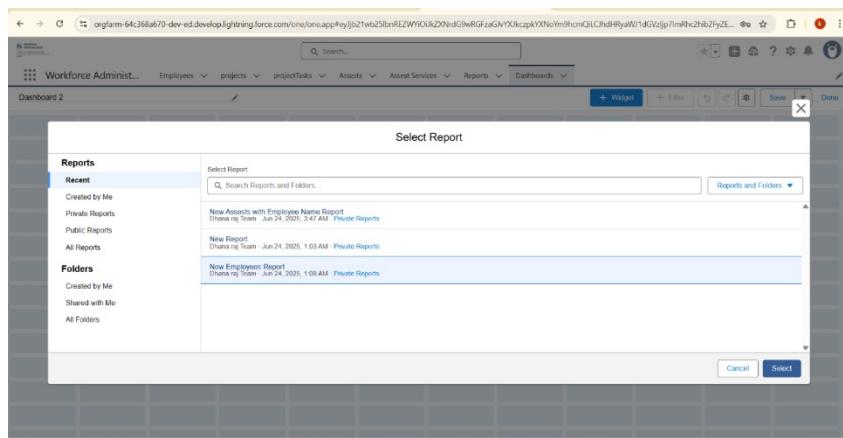
Click Add then click on Save and then click on Done.



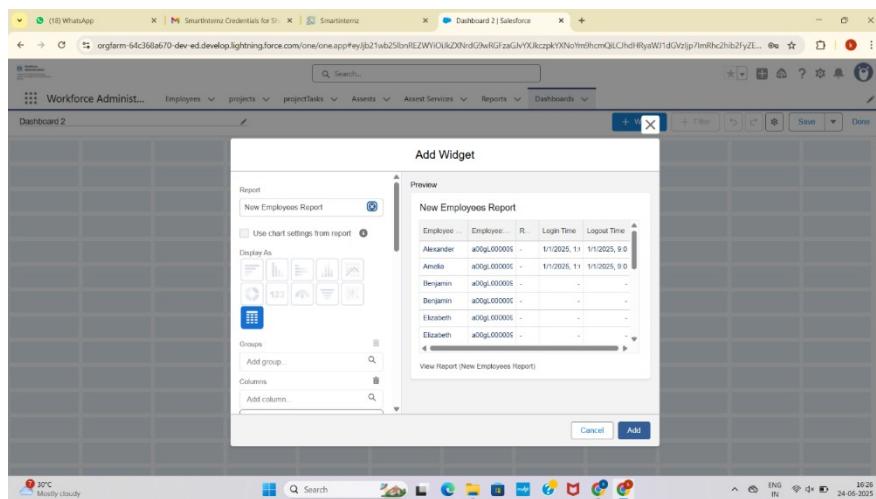
Create another Dashboard
click on the Dashboards tabs and click on New Dashboard. Give a Name and click on Create.



Select add Widget and Select a Report and click on select.



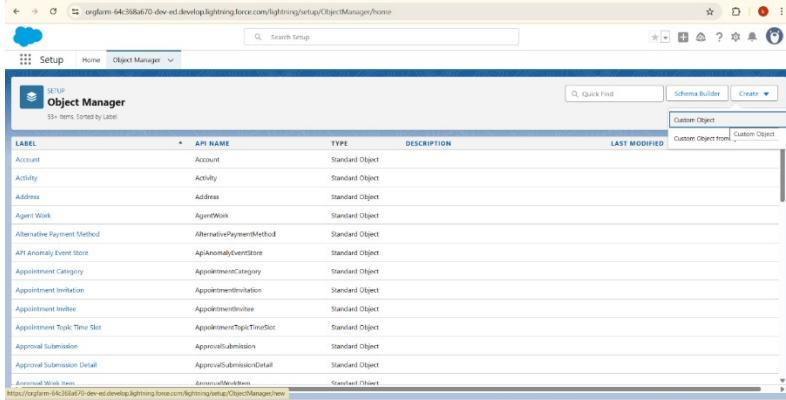
Click Add then click on Save and then click on Done.



Approval Process

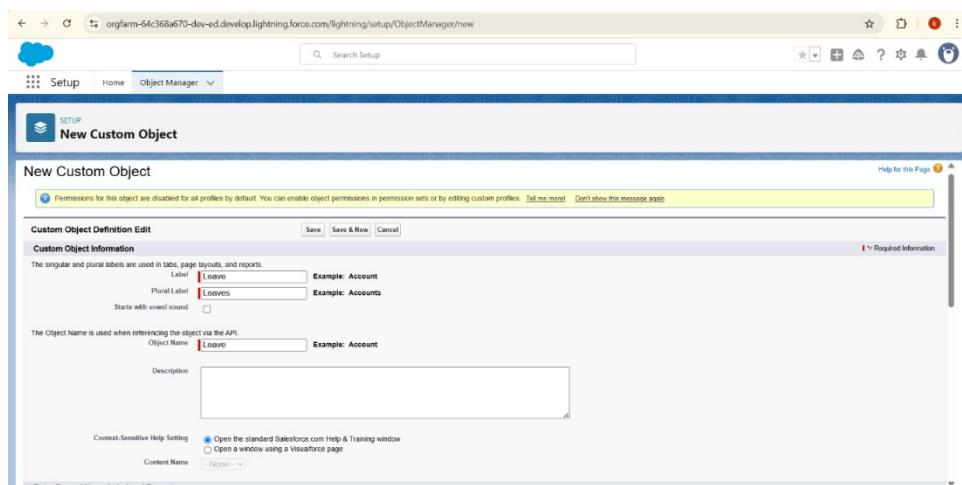
Create a leave Object.

Go to Setup and click on object Manager then select custom Object.

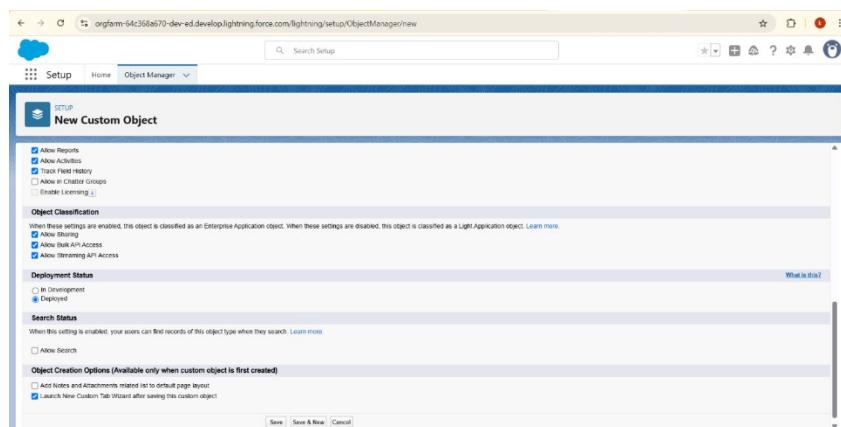


The screenshot shows the Salesforce Object Manager page. The title bar says "Object Manager". The main area displays a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. The table lists various standard objects like Account, Activity, Address, etc. A "Create" button is visible at the top right of the table area.

Give the label name as leave.



The screenshot shows the "New Custom Object" definition edit page. The title bar says "New Custom Object". The main area has sections for "Custom Object Definition Edit" and "Custom Object Information". In the "Custom Object Information" section, the "Label" field is set to "Leave" and the "Plural Label" field is set to "Leaves". There are also fields for "Starts with vowel sound" (unchecked) and "Object Name" (set to "Leave"). A "Description" text area is present. At the bottom, there are "Content-Sensitive Help Setting" options (radio buttons for "Open the standard Salesforce.com Help & Training window" and "Open a window using a Visualforce page"), a "Content Name" dropdown (set to "Leave"), and a "Enter Record Name / Label and Format" input field.



This screenshot continues the "New Custom Object" definition edit page. It includes sections for "Object Settings", "Object Classification", "Deployment Status", "Search Status", and "Object Creation Options". Under "Object Settings", checkboxes are shown for "Allow Reports", "Allow Dashboards", "Track Field History", "Allow in Chatter Groups", and "Enable Licensing". Under "Object Classification", checkboxes are shown for "Allow Sharing", "Allow Bulk API Access", and "Allow Streaming API Access". Under "Deployment Status", checkboxes are shown for "In Development" and "Deployed". Under "Search Status", a checkbox is shown for "Allow Search". Under "Object Creation Options", a checkbox is shown for "Add Notes and Attachments (Available only when custom object is first created)". At the bottom, there are "Save", "Save & New", and "Cancel" buttons.

Click on save.

Create a field in leave object and click on new.

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Leave' object. The 'Fields & Relationships' tab is selected. A table displays the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Leave Name	Name	Text(50)		✓
Owner	OwnerId	Lookup(User/Group)		✓

Choose the field type as lookup relationship and object is employee and then field label

The screenshot shows the 'New Relationship' setup process, Step 3 of 6. The 'Field Label' is set to 'Employee Name' and the 'Field Name' is 'Employee__Name'. The 'Child Relationship Name' is 'Leaves'. The 'Required' section has 'Clear the value of the field. You can't choose the option if you make this field required' selected. The 'Auto-add to custom report type' section has 'Add this field to existing custom report types that contain this entry' selected.

The screenshot shows the 'Establish Field-level security for reference field' setup process, Step 4 of 6. It lists profiles and their security settings for the 'Employee Name' field. The 'Read Only' checkbox is checked for most profiles.

Profile	Read Only
Anonymous Guest	<input checked="" type="checkbox"/>
Anonymous Guest (Integration User)	<input checked="" type="checkbox"/>
Anonymous Guest (Sales User)	<input checked="" type="checkbox"/>
Anonymous Guest (Service User)	<input checked="" type="checkbox"/>
Anonymous Integrator	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>
Cross-Collaboration User	<input checked="" type="checkbox"/>
Custom Marketing Profile	<input checked="" type="checkbox"/>
Custom Sales Profile	<input checked="" type="checkbox"/>
Custom Support Profile	<input checked="" type="checkbox"/>
Customer Agent (User)	<input checked="" type="checkbox"/>
Force.com - App Subscriptions User	<input checked="" type="checkbox"/>

The screenshot shows the 'Add reference field to Page Layouts' setup process, Step 5 of 6. The 'Field Label' is 'Employee Name' and the 'Field Name' is 'Employee__Name'. The 'Leave Layout' is selected in the 'Page Layout Name' dropdown.

Click on save.

Choose the field type as Number and field is No. of Days next step as

Leave

New Custom Field

Step 4. Add to page layouts

Field Label: No. of Days
Data Type: Number
Field Name: No_of_Days
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field - Page Layout Name
 Leave Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Choose the field type as text and field is Subject next step as

Leave

Fields & Relationships

- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Picklist
- Phone
- Picklist (Multi-Select)
- Text** (selected)
- Text Area
- Text Area (Long)
- Text Area (Rich)

Allows users to select a True (checked) or False (unchecked) value.
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Allows users to enter a date or pick a date from a pop-up calendar.
Allows users to enter a date and time from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Allows users to enter an email address, which is validated to ensure it's a legitimate email. If the field is specified for a contact or lead, users can choose the address when clicking Send an Email link.
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Allows users to enter any number. Leading zeros are removed.
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Allows users to enter any phone number. Automatically formats it as a phone number.
Allows users to select a value from a picklist.
Allows users to select multiple values from a list you define.
Allows users to enter any combination of letters and numbers.
Allows users to enter up to 256 characters on separate lines.
Allows users to enter up to 131,072 characters on separate lines.
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Leave

New Custom Field

Step 2. Enter the details

Field Label:

Please enter the maximum length for a text field below.

Length:

Field Name:

Description:

Help Text:

Required: Always require a value in this field in order to save a record.

Unique: Do not allow duplicate values.
Note: This option prevents two records from having the same value in this field. If two records have the same value, one record will be updated and the other will be deleted.

External ID: Set this field as the unique record identifier from an external system.

Auto-add to custom report type: Add this field to existing custom report types that contain this entry.

Leave

New Custom Field

Step 3. Establish field-level security

Field Label: Subject
Data Type: Text
Field Name: Subject
Description: Help Text

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anytime Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Commerce Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Privacy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Leave
New Custom Field
Step 4 of 4

Field Label: Status
Data Type: Picklist
Field Name: Status
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.
 Add Field Page Layout Name
 Leave Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Leave
New Custom Field
Step 4 of 4

Field Label: Status
Data Type: Text
Field Name: Status
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.
 Add Field Page Layout Name
 Leave Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Choose the field type as Text Area (Rich) and field is Description next step as

Leave
Fields & Relationships

Date	Allows users to enter a date or pick a date from a popup calendar.
Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.
Picklist (Multi.Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.
Text Area	Allows users to enter up to 256 characters on separate lines.
Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:600" are all valid times for this field.
URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

The screenshot shows the 'Leave' object setup page. In the 'Fields & Relationships' section, a new custom field is being created. The field is labeled 'Description' and has a length of 52,000 characters. It is a Rich Text Area type. The 'Visible Lines' is set to 25. A help text area is also present.

The screenshot shows the 'Field-Level Security for Profile' section for the 'Description' field. It lists various profiles and their visibility and read-only status. Most profiles have 'Visible' checked and 'Read Only' unchecked.

Profile	Visible	Read Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AnyPoint Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Privacy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
External Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Choose the field type as Picklist and field is Status next step as

The screenshot shows the 'Fields & Relationships' section for the 'Leave' object. Under the 'Type' dropdown, 'Picklist' is selected. A detailed description of what a picklist field does is provided on the right side of the screen.

The screenshots illustrate the process of creating a custom field named "Status" for the "Leave" object in Salesforce.

Step 2: Enter the details

- Field Label: Status
- Values: Approved, Pending
- Field Name: Status
- Description: (empty)
- Help Text: (empty)

Step 3: Establish field-level security

Profile	Mobile	Read Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authorized Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
B2B Recording Portal Buyer Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Connect Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Step 4: Add to page layouts

- Field Label: Status
- Page Layout Name: Leave Layout

Create an Approval Process for Leave object.

In the Manage Approval Processes For list, select Leave. Click Create New Approval Process and select Use Jump Start Wizard.

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-64-368b670-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home>. The page title is "Custom Tabs". The left sidebar includes links for "Home", "Object Manager", "Rename Tabs and Labels", and "Tabs". The main content area has sections for "Custom Tabs", "Custom Object Tabs", "Web Tabs", and "Visualforce Tabs". Each section includes a "New" button and a "What Is This?" link. The "Custom Object Tabs" section lists tabs for "Assets", "Asset Services", "Employees", "People", and "PeopleData". The "Web Tabs" section states "No Web Tabs have been defined". The "Visualforce Tabs" section states "No Visualforce Tabs have been defined". A help link "Help for this Page" is located in the top right corner.



The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The title bar includes the URL `org:lanm-64:368a970-dev:develop.lightning.force.com/lightning/setup/CustomTab/page?address=%2fsetup%2fui%2fobjectCustomTabWizard.jsp%3freURL%2f%252fsetup%252fui%252f...`. The main content area is titled 'New Custom Object Tab' under 'Step 1. Enter the Details'. It asks to choose a custom object for the new tab. A dropdown menu shows 'Object' set to 'Labels'. Below it, 'Tab Style' is set to 'Home Page'. An optional link to a home page is listed as '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' A note says '(Applies Page Cache Link)' with a 'More' button. At the bottom, there's a 'Short description' input field and a 'Next Step' button.

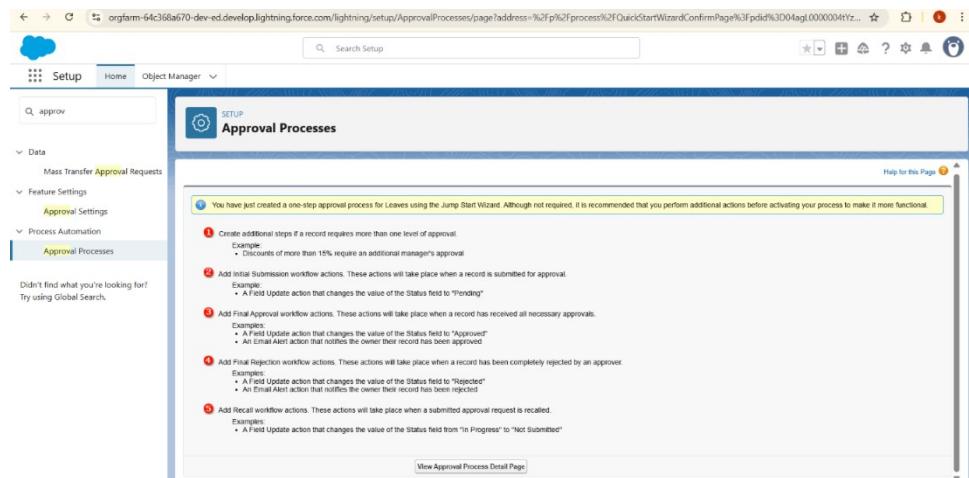
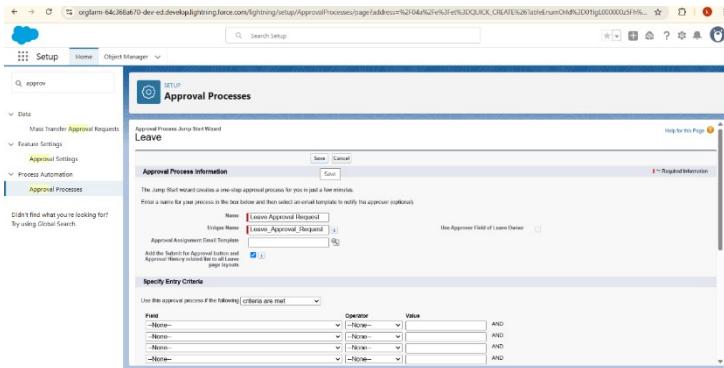
The screenshot shows the Salesforce Lightning setup interface. The left sidebar is titled "Setup" and includes sections for "Home", "Object Manager", "Tabs", "Rename Tabs and Labels", and "Topics". A search bar at the top right says "Search Setup". The main content area has a title "SETUP Tabs" with a gear icon. Below it, a sub-section titled "New Custom Object Tab" is displayed. On the right, there's a "Help for this Page" link and a "Step 2 of 3" indicator. The central part of the screen shows "Step 2: Add to Profiles". It asks to choose user profiles for the new tab. It includes a note: "Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile." Below this, there are two radio button options: "Apply one tab visibility to all profiles (Default: On)" and "Apply a different tab visibility for each profile". A list of user profiles is shown on the left, and their corresponding "Tab Visibility" settings are listed on the right. The "Tab Visibility" column includes dropdown menus for "Default Off", "Default On", and "Custom".

Profile	Tab Visibility
Analytics Cloud Integration User	Default Off
Analytics Cloud Security User	Default Off
Airpoint Integration	Default On
Authenticated Website	Default Off
Authenticated Website	Default Off
B2B RecordSharing Portal Buyer Profile	Default On
Contact Manager	Default On
Cross Org Data Proxy User	Default On
Custom Marketing Profile	Default Off
Customer: Sales Profile	Default On

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The left sidebar includes 'Setup', 'Home', and 'Object Manager'. The main area displays a list of tabs with checkboxes for 'Append tab to users' existing personal customizations'. The tabs listed are:

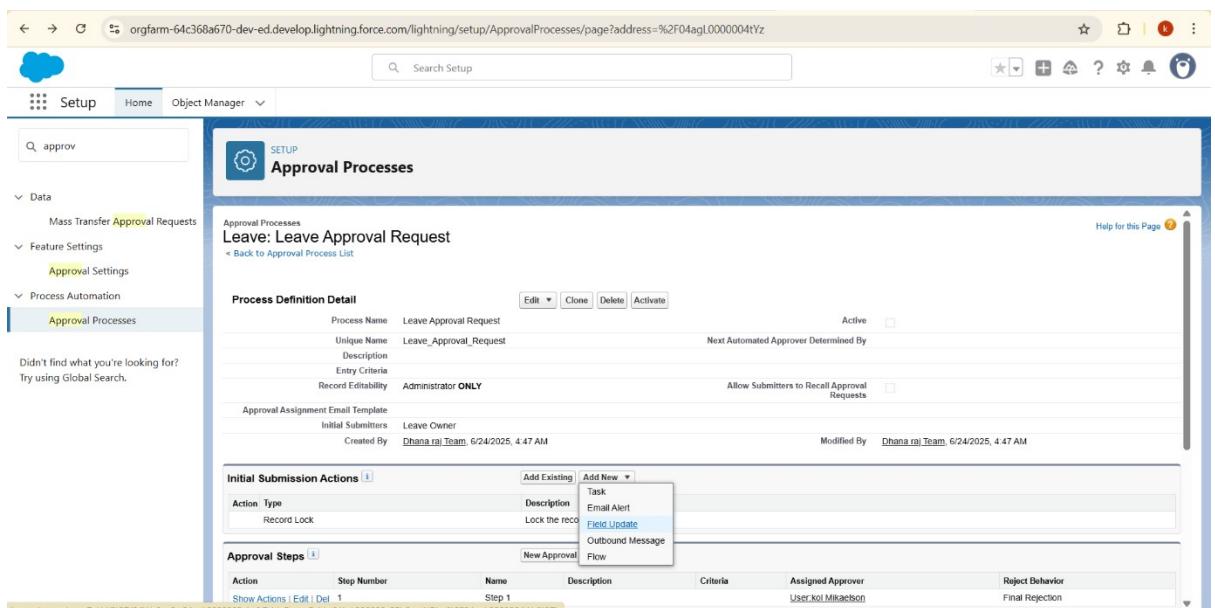
- Service Console (standard__LightningService)
- Bales (standard__LightningBales)
- Lightning Usage Log (standard__LightningInstrumentation)
- Digital Experiences (standard__SalesforceDX)
- Queue Management (standard__QueueManagement)
- Data Manager (standard__DataManager)
- Subscription Management (standard__RevenueCloudConsole)
- Sales Cloud Mobile (standard__SalesCloudMobile)
- Bill Solutions (standard__L_Billing)
- Data Cloud (standard__AudienceSDS)
- Approvals (standard__Approvals)
- My Service Journey (standard__MISApp)
- Salesforce Scheduler Setup (standard__LightningScheduler)
- Automation (standard__WorkflowApp)
- Workforce Administrator Solution (workforce_Administrator_Solutions)

A checkbox at the bottom left is checked, and the bottom right corner shows 'Print', 'Save', and 'Cancel' buttons.



Initial Submission Action.

Under initial submission action click on add new and select field update.



Give field name as Approval status to submit

Field Update Edit

Identification

- Name: Approval Status to Submit
- Unique Name: Approval_Status_to_Submit
- Description:
- Object: Leave
- Field to Update: Status
- Field Data Type: Picklist
- Re-evaluate Workflow Rules after Field Change:

Specify New Field Value

Picklist Options

- The value above the current one
- The value below the current one
- A specific value: Submitted

Save | Save & New | Cancel

Approval Steps

Give the name as “Approval from HR” and click on next.

Step 1. Enter Name and Description

Previous Approval Step Information

- Step Number: 1
- Name: Step 1
- Criteria:
- Assign To: User - kol Mikaelson

Enter Name and Description

Approval Process Name: Leave Approval Request

Name: Approval from HR

Unique Name: Approval_from_HR

Description:

Step Number: 2

Next | Cancel

The screenshot shows the 'Approval Processes' setup page. On the left sidebar, under 'Process Automation', 'Approval Processes' is selected. The main area displays the 'Specify Step Criteria' section. It shows a table with columns 'Field', 'Operator', and 'Value'. The first row has 'Leave: No. of Days' as the field, 'equals' as the operator, and '3' as the value. Below the table is an 'Add Filter Logic...' button. At the top of the page, there is a 'Previous' and 'Next' button.

The screenshot shows the 'Approval Processes' setup page. Under 'Process Automation', 'Approval Processes' is selected. The main area displays the 'Select Approver' section. It shows a table with a single row where 'Niklaus Mikaelson' is listed as an approver. Below the table, there is a section for 'When multiple approvers are selected:' with options 'Approve or reject based on the FIRST response.' (selected) and 'Require UNANIMOUS approval from all selected approvers.'. At the bottom of the page, there is a 'Reject Behavior' section with options 'Perform all rejection actions for this step AND all final rejection actions (Final Rejection)' (selected) and 'Perform ONLY the rejection actions for this step and send the approval request back to the most recent approver. (Go Back 1 Step)'. At the bottom right, there are 'Previous', 'Save', and 'Cancel' buttons.

Select No I will do later

The screenshot shows the 'Approval Processes' setup page. Under 'Process Automation', 'Approval Processes' is selected. The main area displays a confirmation dialog titled 'What Would You Like To Do Now?'. It asks if you want to perform workflow actions upon approval or rejection. The 'No, I'll do this later. Take me to the approval process detail page to review what I've just created.' option is selected. At the bottom right, there is a 'Get Started' button.

Final Approval Action.

Under initial submission action click on add new and then select field update.

Give name as “Approval Status to Approved”. Under specify new field value select “A specific value” and select Approved and click Save.

Final Rejection Action.

Under initial submission action click on add new and then select field update.

Approval Processes

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions	1	Step 1	Record Lock	Lock the record from being edited	User Karl Mikaelson	Final Rejection
Show Actions	2	Approval from HR	Field Update	Approval Status to Submitted	User Niklaus Mikaelson	Final Rejection

Given name as “Approval Status to Rejected”

Field Updates

Field Update Edit

Name	Approval Status to Rejected
Unique Name	Approval_Status_to_Reject
Object	Leave
Field to Update	Status
Field Data Type	Picklist
Re-evaluate Workflow Rules after Field Change	<input type="checkbox"/>

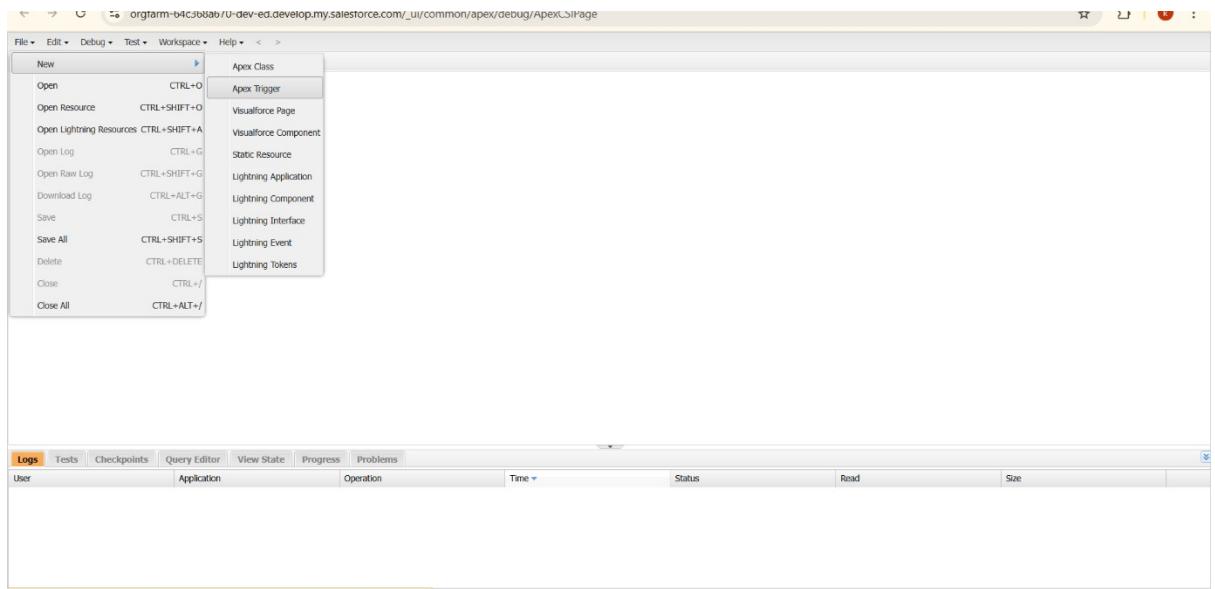
Specify New Field Value

Picklist Options

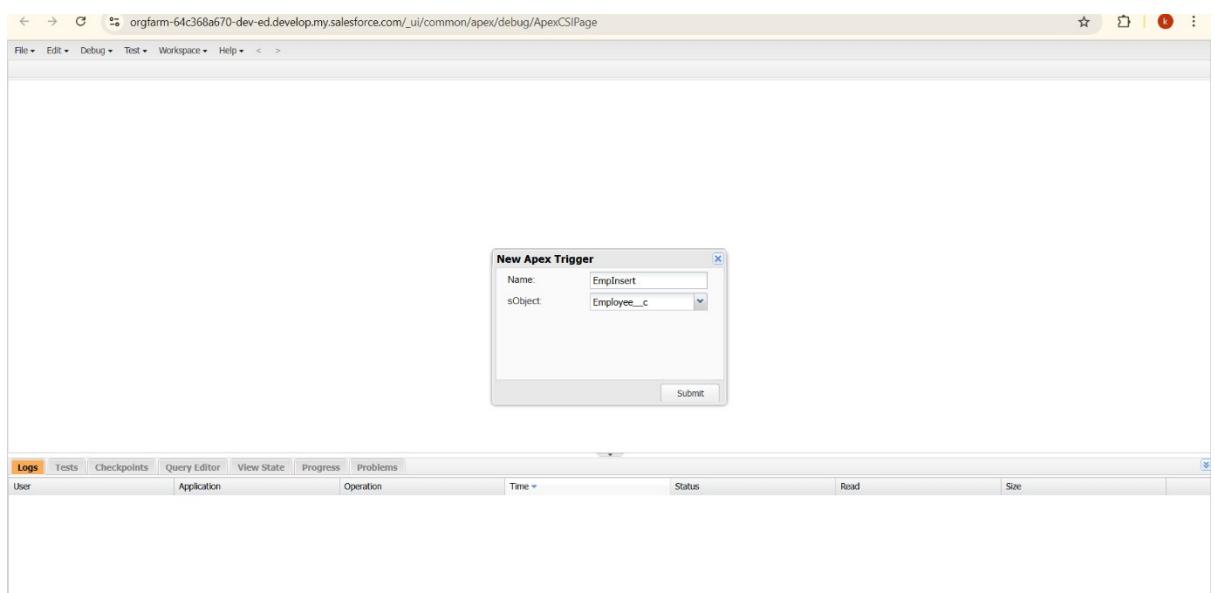
- The value above the current one
- The value below the current one
- A specific value

6.18 Apex Trigger

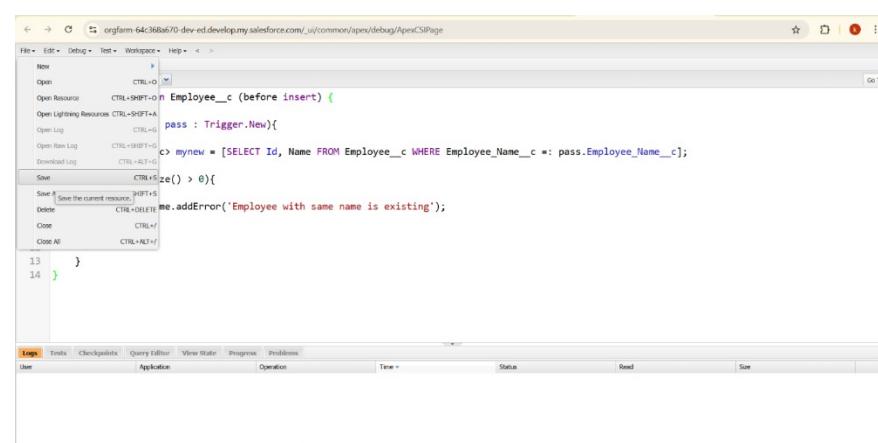
Creating an apex trigger
Click on new file and select apex class



Name is EmpInsert and object is Employee__c.



Click on save



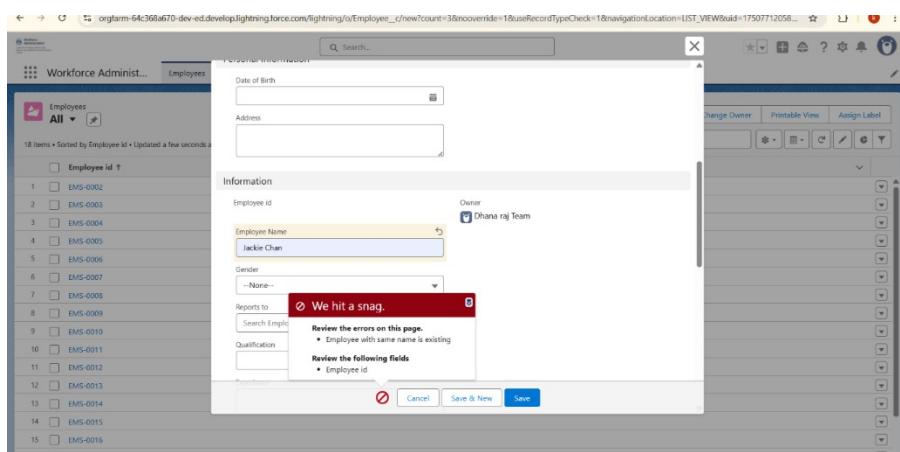
```

trigger EmpInsert on Employee__c (before insert) {
    for(Employee__c pass : Trigger.New){
        List<Employee__c> mynew = [SELECT Id, Name FROM Employee__c WHERE Employee_Name__c =: pass.Employee_Name__c];
        if(mynew.size() > 0){
            pass.Name.addError('Employee with same name is existing');
        }
    }
}

```

The screenshot shows the Salesforce Apex Editor interface. The top navigation bar includes File, Edit, Debug, Test, Workspace, and Help. The current page is 'EmpInsert.apex'. The code editor displays the provided Apex trigger. Below the editor is a logs table with columns: Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The 'Logs' tab is selected. A modal window titled 'We hit a snag.' is open, displaying error messages: 'Review the errors on this page.' (Employee with same name is existing) and 'Review the following fields' (Employee id). The bottom of the screen shows a search bar and a 'Filter' button.

Testing the trigger



Sprint Summary & Velocity Calculation – Workforce Administration Solution

A **Sprint** is a fixed-duration development cycle during which the team completes a planned set of tasks. An **Epic** represents a larger objective, which is divided into smaller, manageable **User Stories**. Each story is assigned **Story Points** based on its complexity using a standard estimation technique (typically inspired by the Fibonacci series).

Sprint 1: (3 Days)

Employee & Asset Management Epic

Create Custom Employee Object – 4 Points

Configure Master-Detail Relationship with Assets – 2 Points

Build Apex Trigger for Duplicate Prevention – 2 Points

Set Up Lightning App Tabs – 2 Point

Total Story Points (Sprint 1): 10

Sprint 2: (2 Days)

Leave & Access Control Epic

Automate Leave Approval Process – 4Points

Implement Profile & Role-based Security – 4 Points

Build Dashboard for Project Participation – 2 Points

Total Story Points (Sprint 2): 10

Sprint 3: (2 Days)

Reporting & Navigation Epic

Configure Reports for Asset & Leave Status – 5 Points

Optimize Tab Navigation & UI Layout – 5 Points

Total Story Points (Sprint 3): 10

Velocity Calculation

Total Story Points Completed: 10(Sprint 1) + 10 (Sprint 2) + 10 (Sprint 3) = **30** **Number of Sprints:** 3

Velocity = Total Story Points ÷ Number of Sprints **Velocity = 30 ÷ 3 ≈ 10.0 Story Points per Sprint**

Your team's **average velocity is approximately 10.0 story points per sprint**, based on the completed development cycles in the Workforce Administration Solution project.