INTRODUCTION

Team ID : LTVIP2025TMID29792

Team Size : 4

Team Leader : P Dhana Raj

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Team member : Kola Durga Gayatri Rama Devi

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Team member : Krupasatya Kotipalli

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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

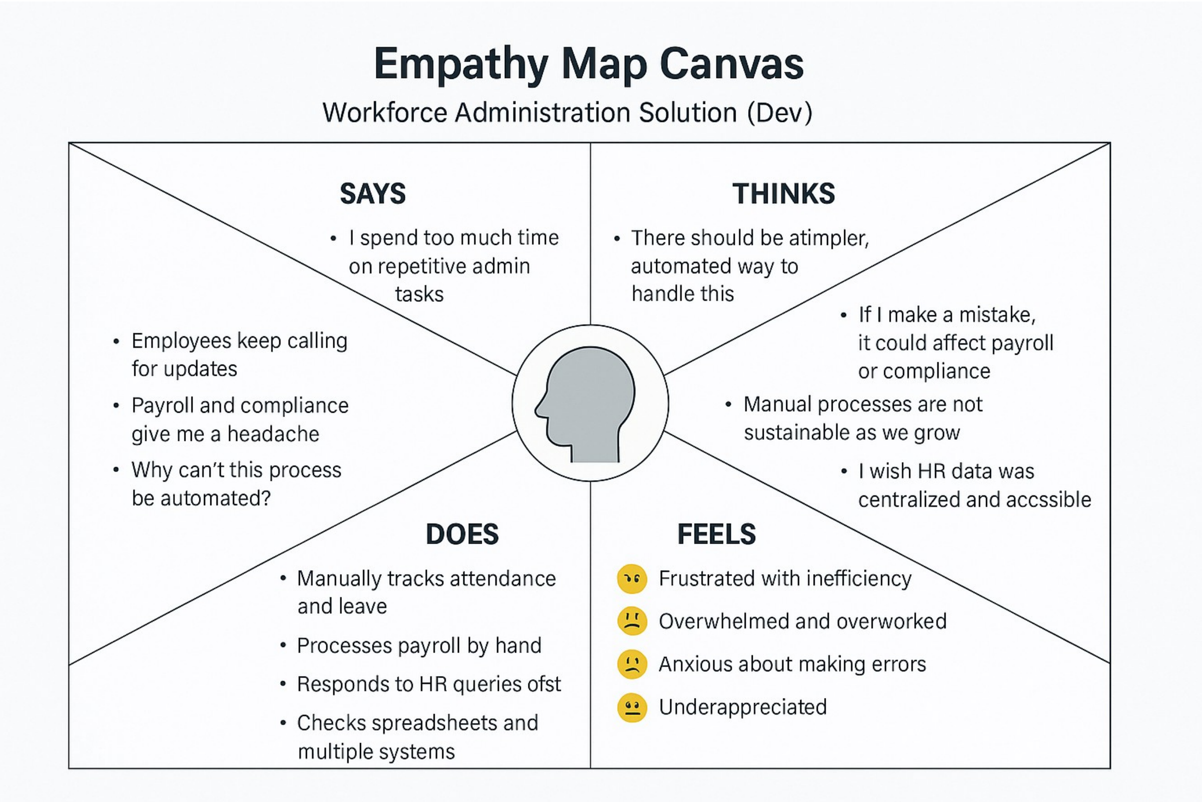
Date	20 June 2025
Team ID	LTVIP2025TMID29792
Project Name	Workforce Administration Solution (Dev)

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	• Biometric logins • Mobile check-ins
Payroll & Compliance	• Auto salary calc • Leave-pay sync
Employee Self-Service	• Leave requests • Payslip download • Personal info update
HR Analytics	• Reports on attrition • productivity
Communication Tools	• 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)

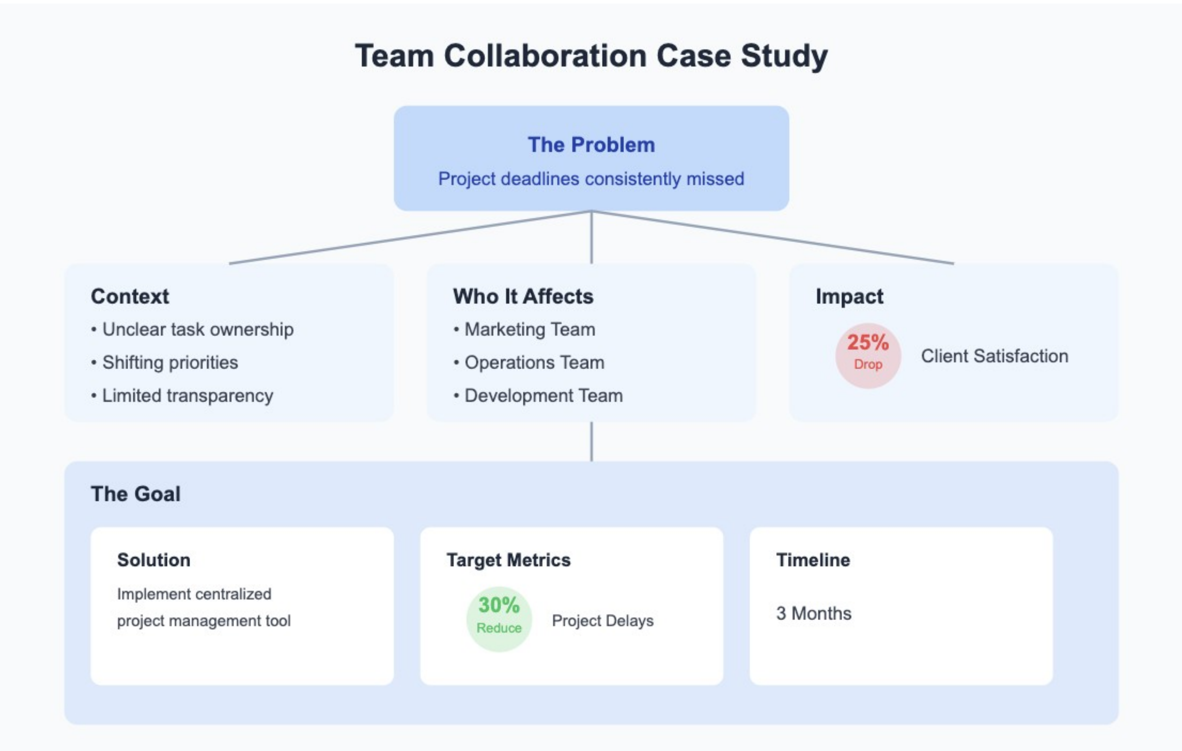
Brainstorm & Idea Prioritization Template:

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)

	Awareness	Consideration	Onboarding	Usage	Review	Administration
Employee Activities	Searches for a solution to track attendance and request time off	Explores the software's features for clocking in and leave managern	Legs into the systent, leams 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 capabilitie 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 concemns
Pain Points	Difficulty managing attendance records and leave requests	Time consuming manual processes	Offer comprehe- ai+sive training and support	Improve accuracy with biometiic integration	Erinance reporting and analytics capabilities	Reinforce data protection measures
Opportu-	Highlight benefile of	Demon- strate of-	Offer comprehe-	Priyacy and secu-	Privacy and security	Reinforce data protection

is over?

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.

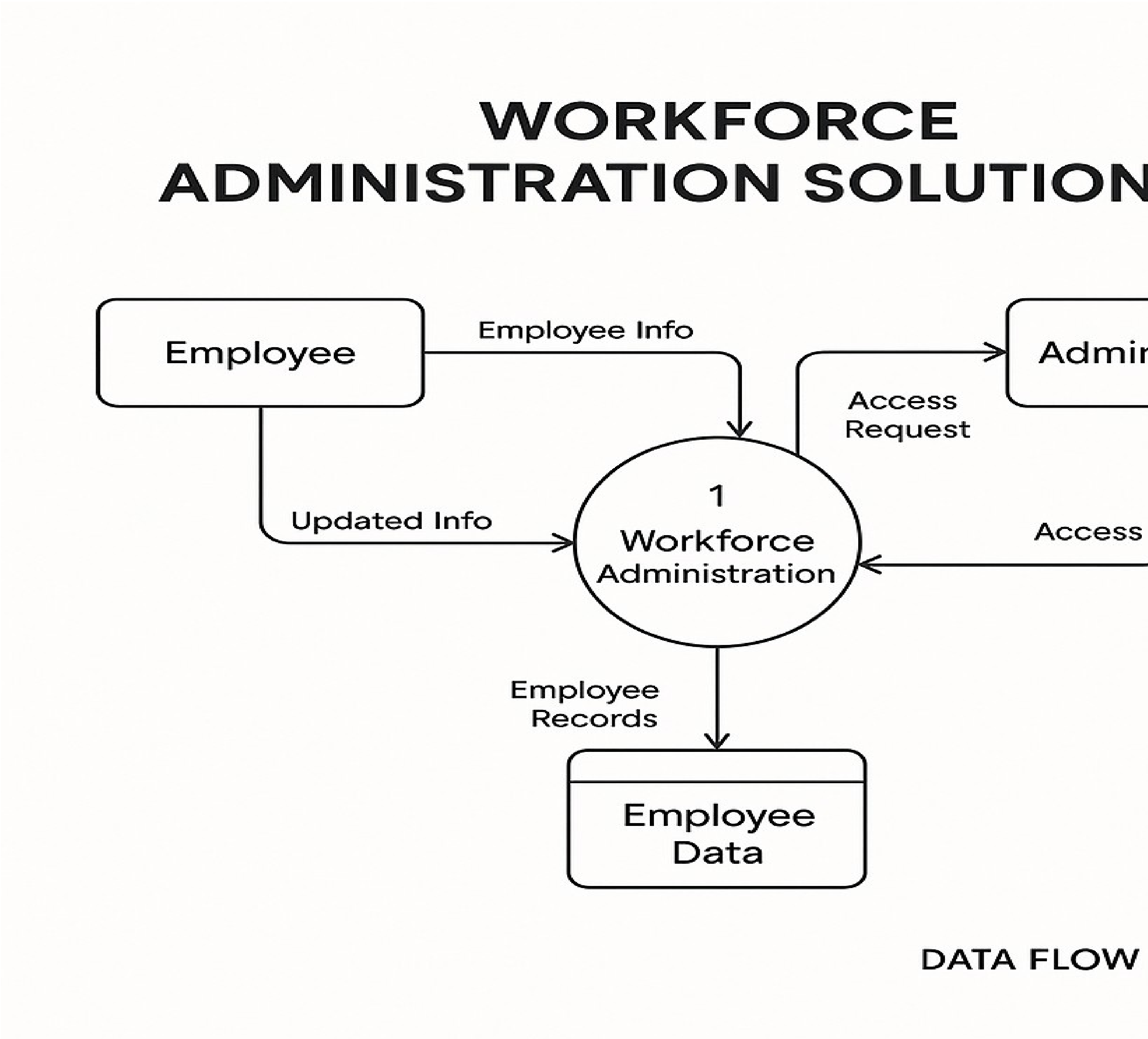
Main Process:

Workforce Admin System (central process)

Data Stores:

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

Example: (Simplified)



User Stories:

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

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 Admi
Payroll System	Generate payroll using attendance and leave info	External System	Receives structured dat

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

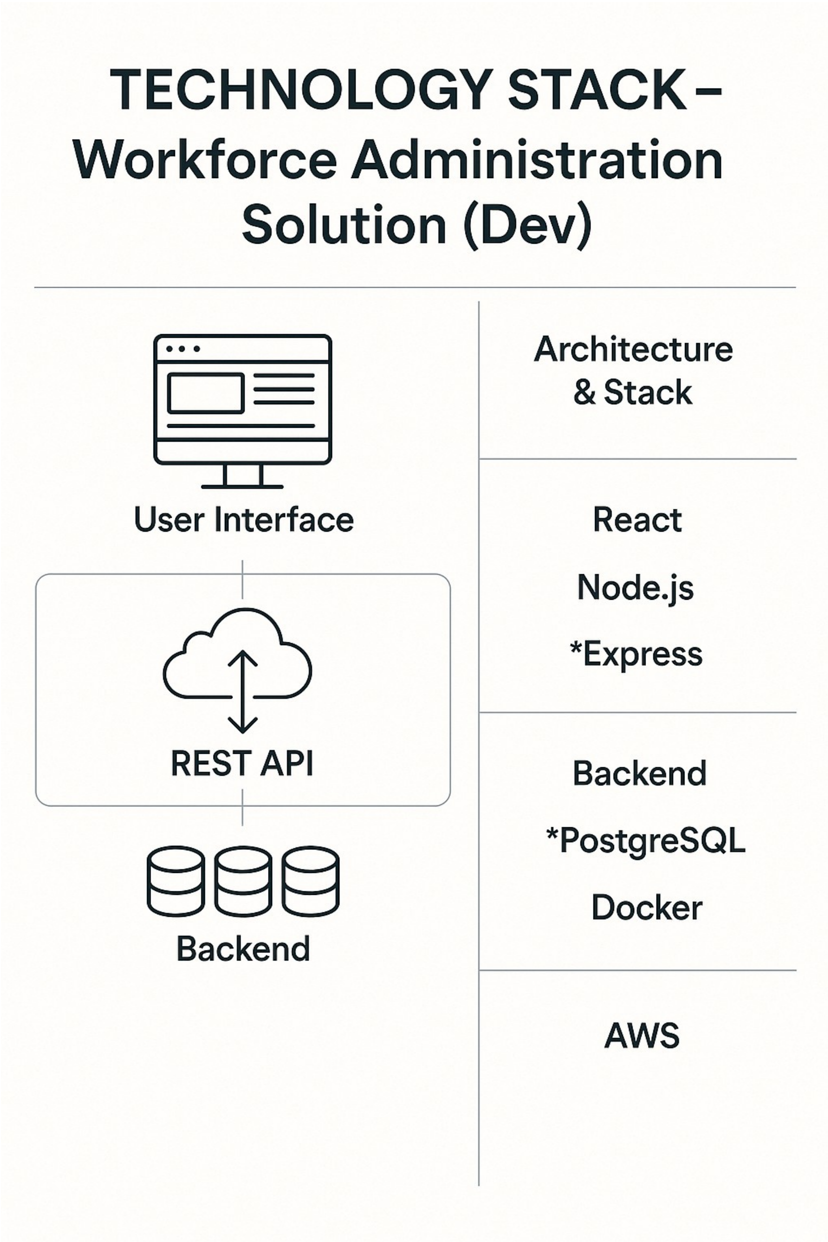


Table-1 : Components & Technologies:

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

	Authentication	JWT / OAuth 2.0	Se
	Database	PostgreSQL / MongoDB	Sto log
	Real-time Sync	Firebase / Socket.IO	Re not
	Cloud Hosting	AWS / Azure / GCP	Ho
	DevOps / CI-CD	GitHub Actions / Docker / Jenkins	Au ver
	Analytics	Metabase / Power BI	Vis
	Security Tools	SSL, Firewalls, Role-based Access Control	Da visi

Table-2: Application Characteristics:

S.No	Characteristics	Description	Tec
	Secure user login and access control	Individual components like attendance, leave, and payroll can operate independently.	Tech
	Scalability	Supports growing teams from small startups to large enterprises.	e.g. Con
	Real-Time Processing	Instant updates for attendance, notifications, and shift changes.	Tech
	Role-Based Access	Secure login and permissions for employees, HR, and admin.	Tech
	Cross-Platform Access	Available on both web browsers and mobile devices.	Tech
	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.	

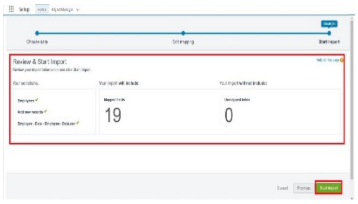
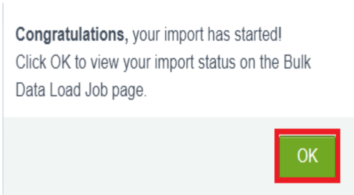
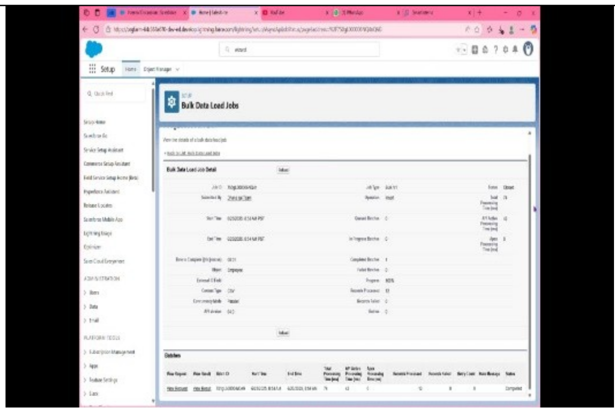
Project Development Phase

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	Salesforce automation setup for Data management using Object, Fields and Reports. **Note :** Import Records if data Match Correctly then Records will Created or Else it will Show Error	
	Accuracy	Training Accuracy - 98% Validation Accuracy - 98%	
3.	Confidence Score (Only Yolo Projects)	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.	

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

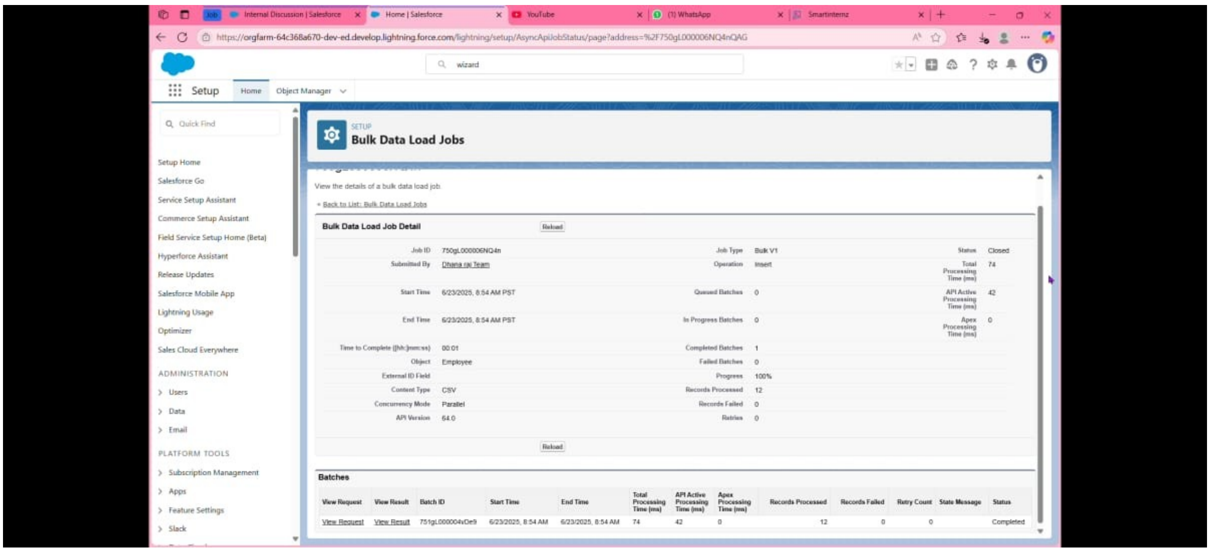
10. Testing

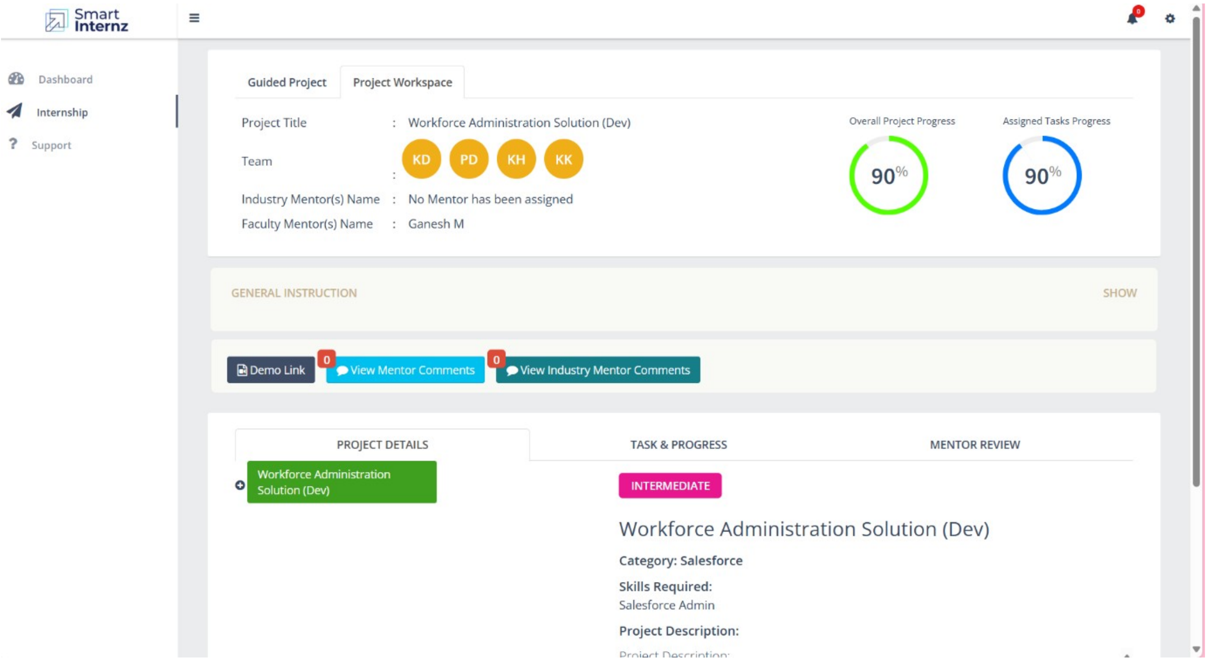
Manual testing via UAT

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

UAT passed all scenarios with accurate data outcomes

11. Screenshots or Demo:





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.

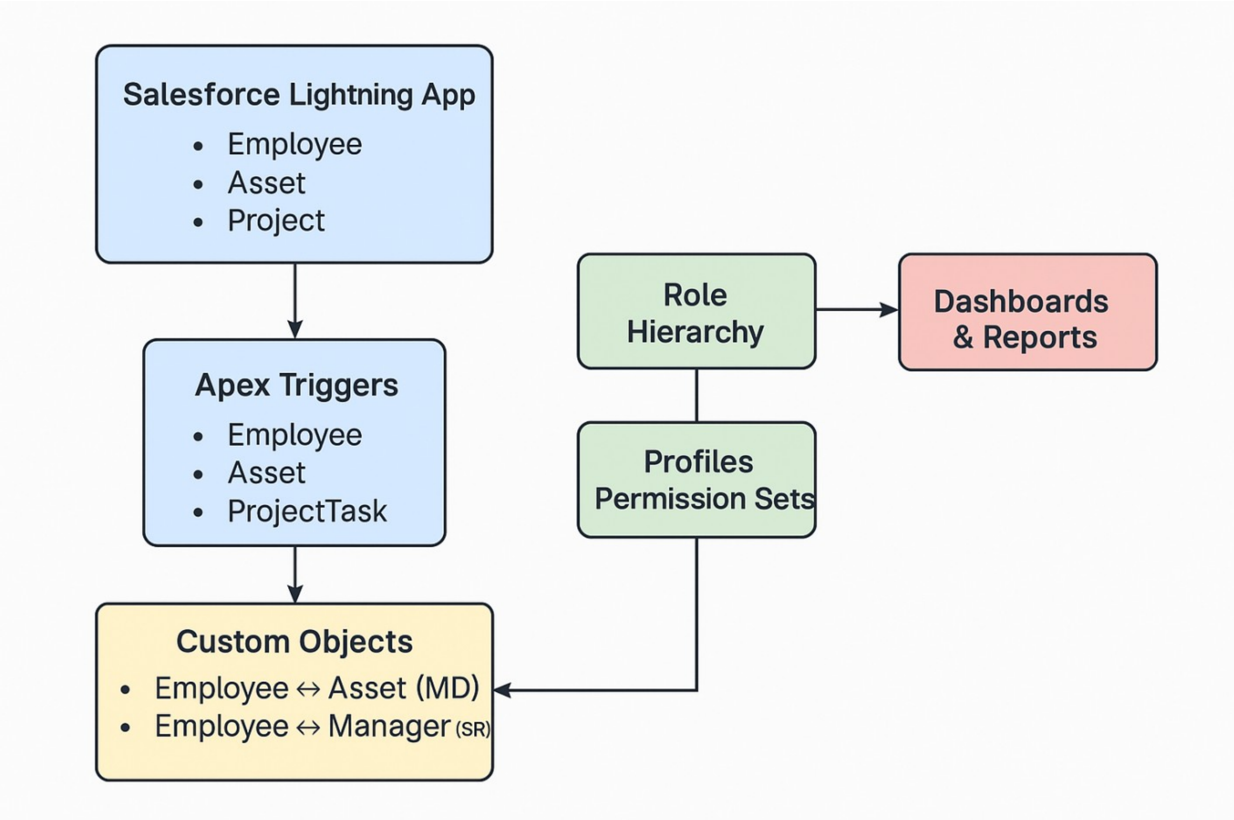
Its goals are to:

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 Digram.

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	Sto
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.	
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.	
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.	
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.	
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.	
Sprint-2	Project Assignment Dashboard	USN-6	As a manager, I can view dashboards showing employee participation, project distribution, and asset usage metrics.	
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.	
Sprint-3	Reporting &Analytics	USN-8	As a team lead, I can access reports that summarize employee attendance, project assignments, and asset tracking trends.	

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

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

					Planned Er
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 = Total Story Points Completed ÷ Sprint Duration (in Days)
Given:
Total Story Points = 20
Sprint Duration = 10 Days
Average Velocity = 20 ÷ 10 = 2 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:

References:

https://www.ideahackers.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 vadilation error message	[✓]
Tc -005	Dashboard visibility based on roles	Login as manager → Open Dashboard tab	*Dashboard displayed only relevant data according to the user's role.*	[✓]

Bug Tracking:

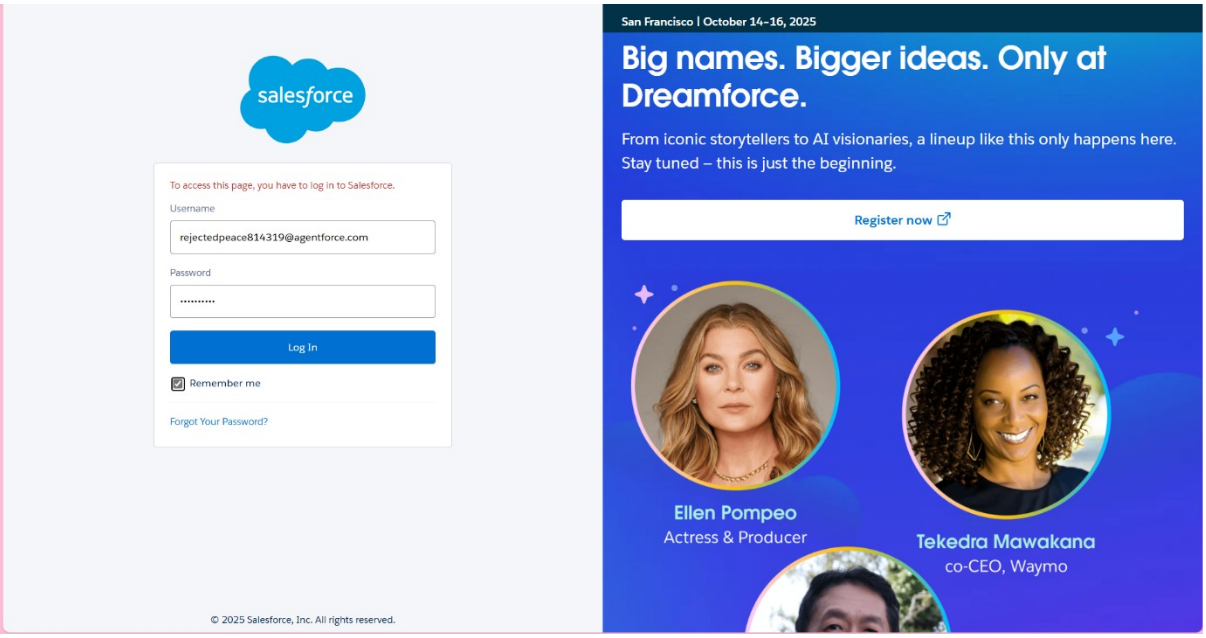
Bug ID	Bug Description	Steps to reproduce	Severity	Status	Additional feedback
BG-001	Leave request approval email not triggered	Submit leave request → Wait for approver email	Medium	In Progress	Review Process Builder and email alert configurations.
BG-002	Assigned asset not showing under employee record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

Sign-off:

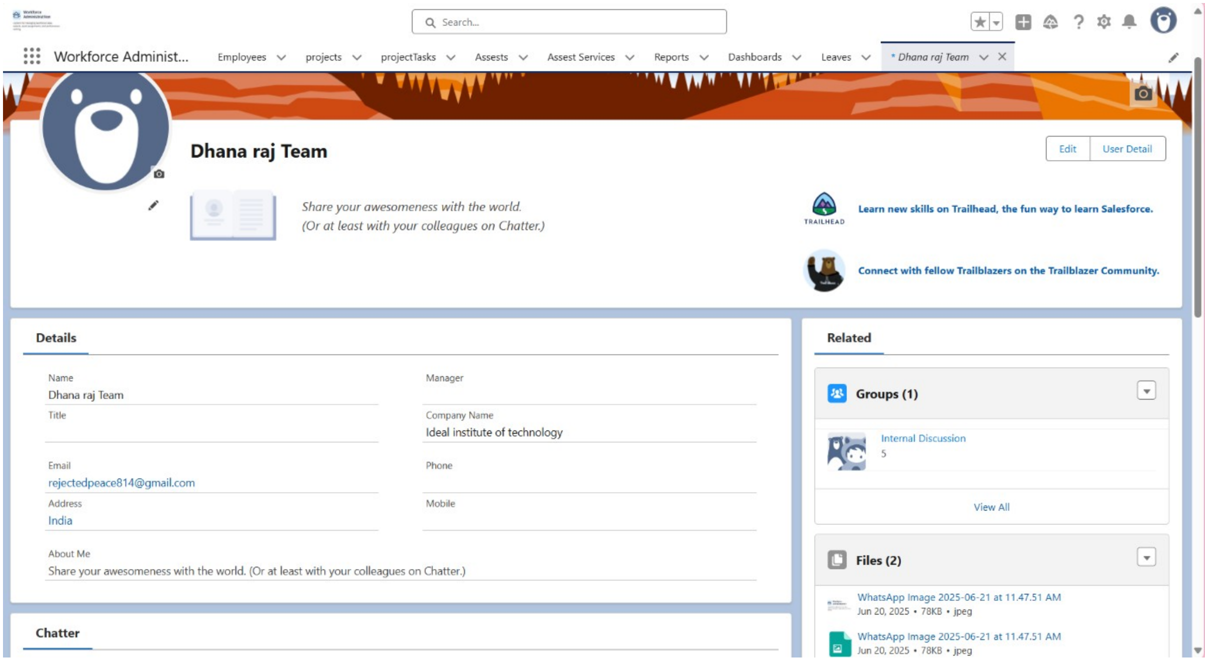
Tester Name: [ALL TEAM MEMBERS]

Date: [28-6-2025]

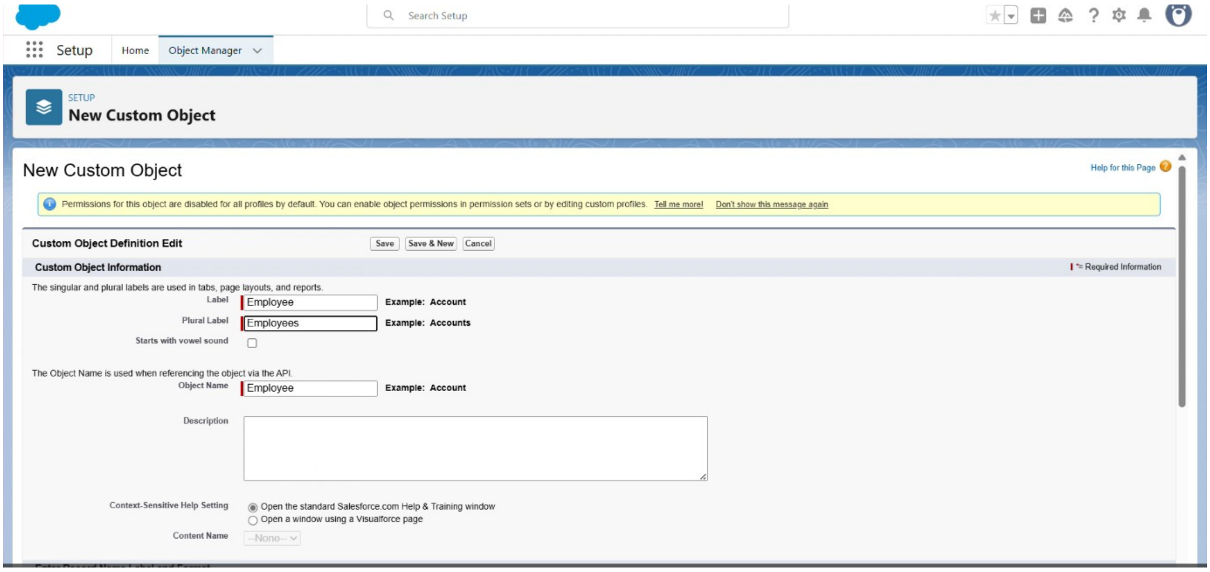
Step1: first we created account in salesforce development (Developer Edition with Agentforce and Data Cloud - Salesforce.com)



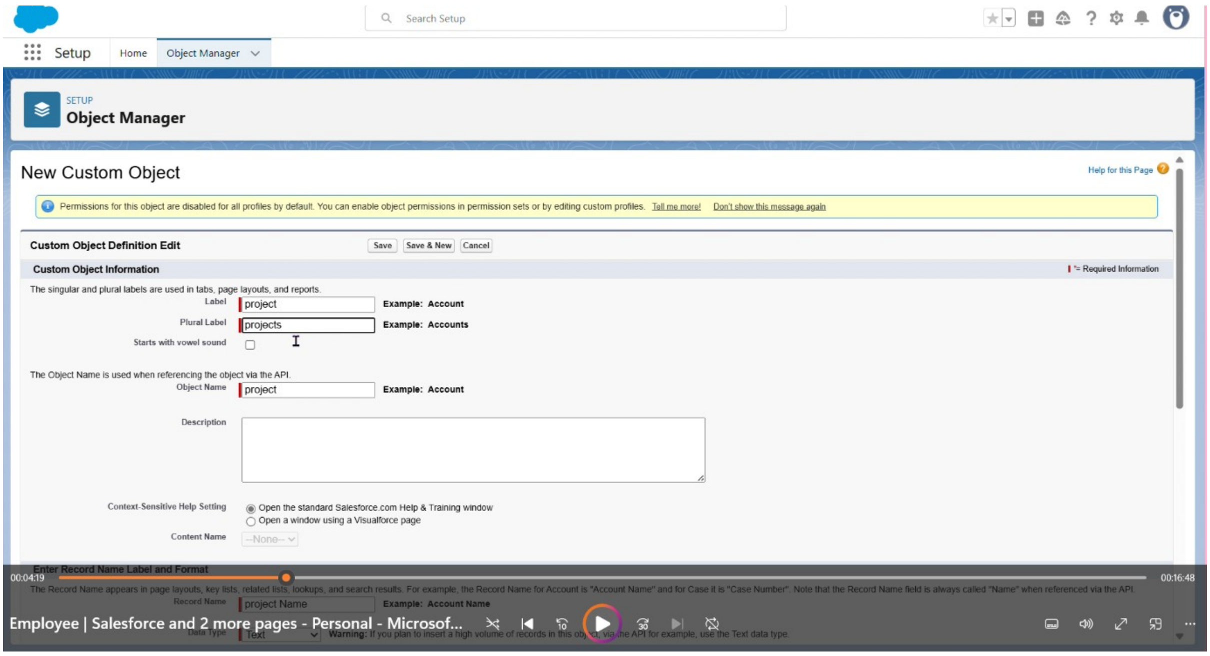
Step 2: Activated the account



Step 3: next created Employee object

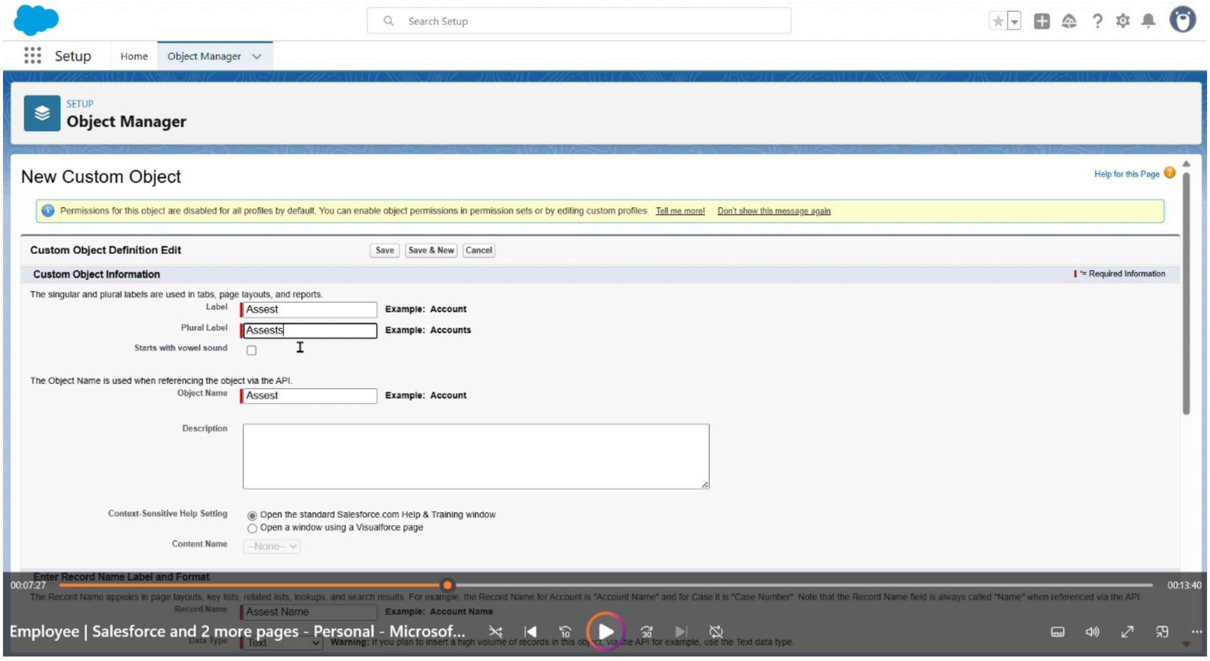


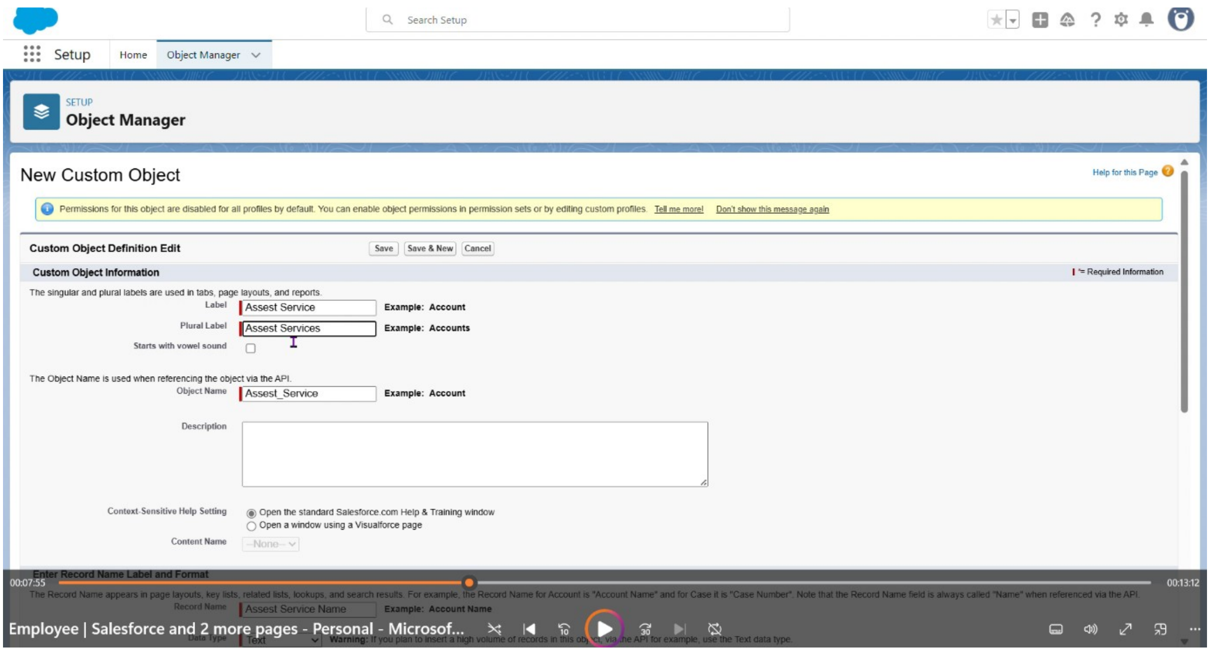
Step 4: next created custom object

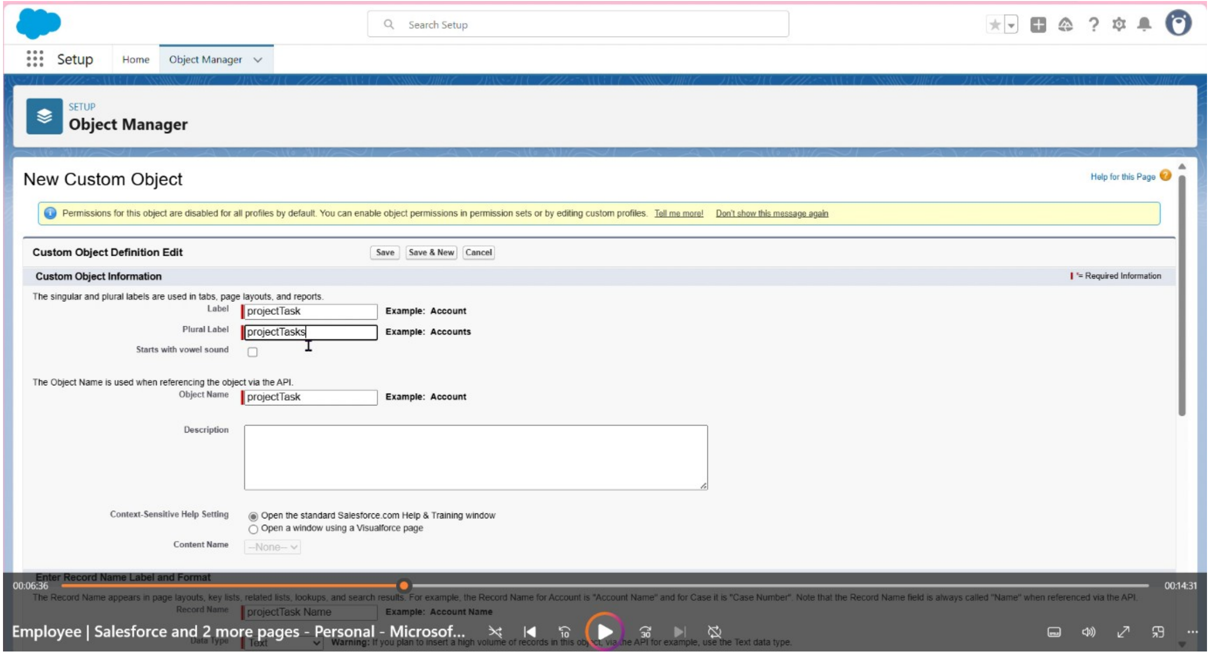


Step 5:

Created objects with names As projectTask , Assest, Assest Service

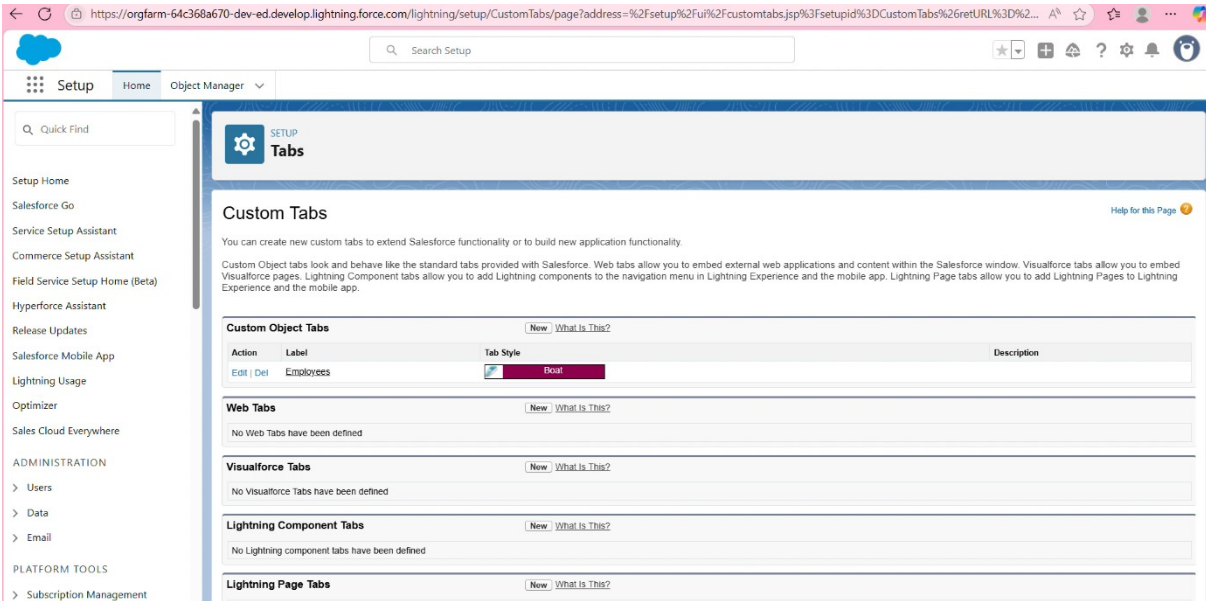

Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
New Custom Object
Help for this Page
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Assest
Example: Account
Plural Label
Assests
Example: Accounts
Starts with vowel sound
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
--None--
Enter Record Name Label and Format
00:07:27
00:13:40
Employee | Salesforce and 2 more pages - Personal - Microsof...


Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
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
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Assest Service
Example: Account
Plural Label
Assest Services
Example: Accounts
Starts with vowel sound
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
--None--
Enter Record Name Label and Format
00:07:55
00:13:12
Employee | Salesforce and 2 more pages - Personal - Microsof...



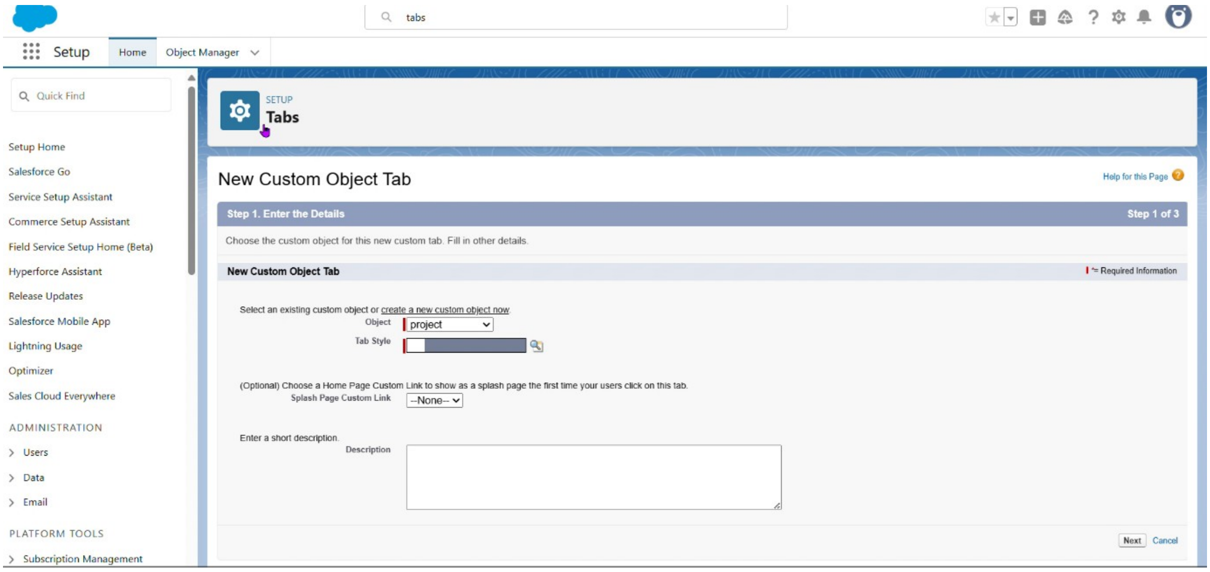
Step 6:

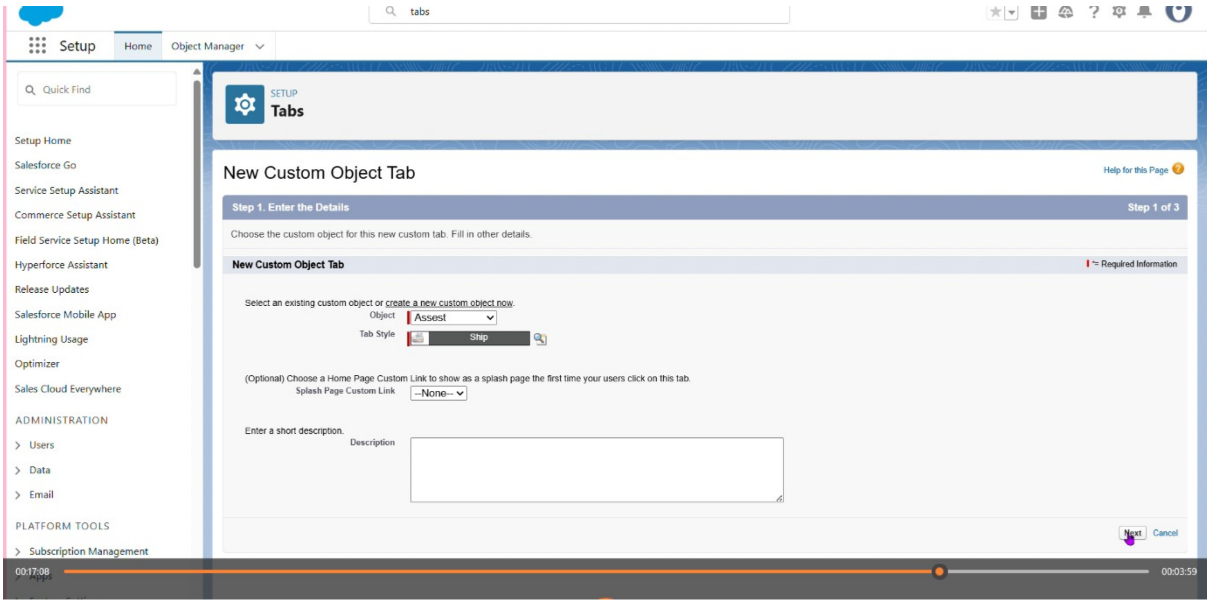
Creating a custom tab employee

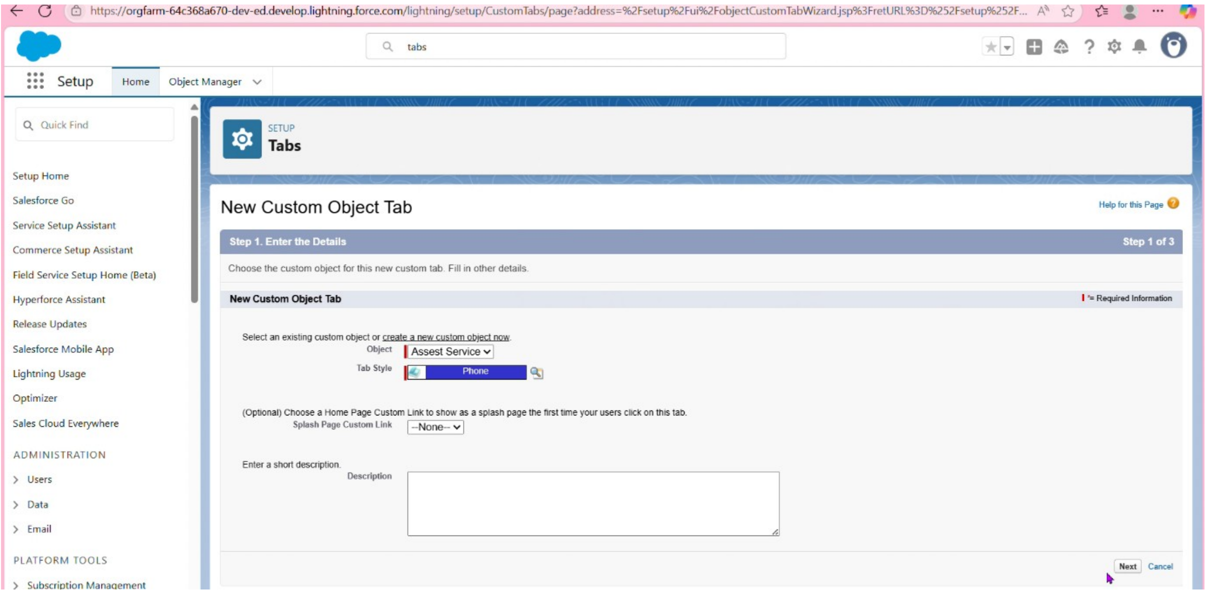


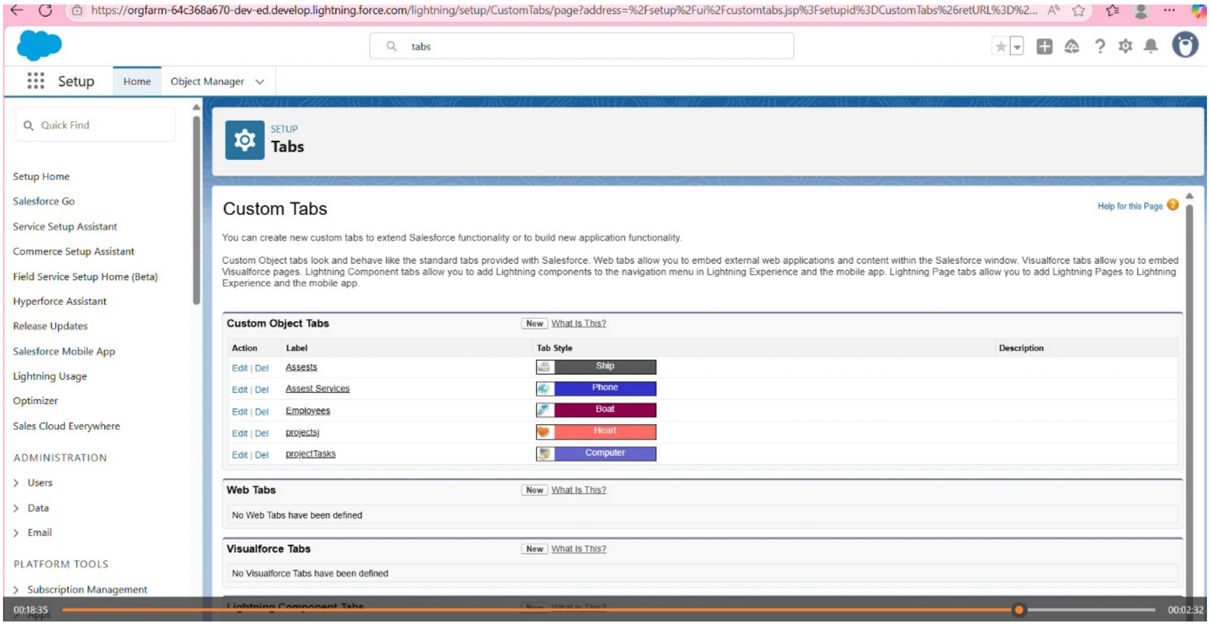
Step 7:

Creating tabs for remaining objects also


tabs
Setup
Home
Object Manager
Quick Find
Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
New Custom Object Tab
= Required Information
Select an existing custom object or create a new custom object now.
Object
project
Tab Style
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel

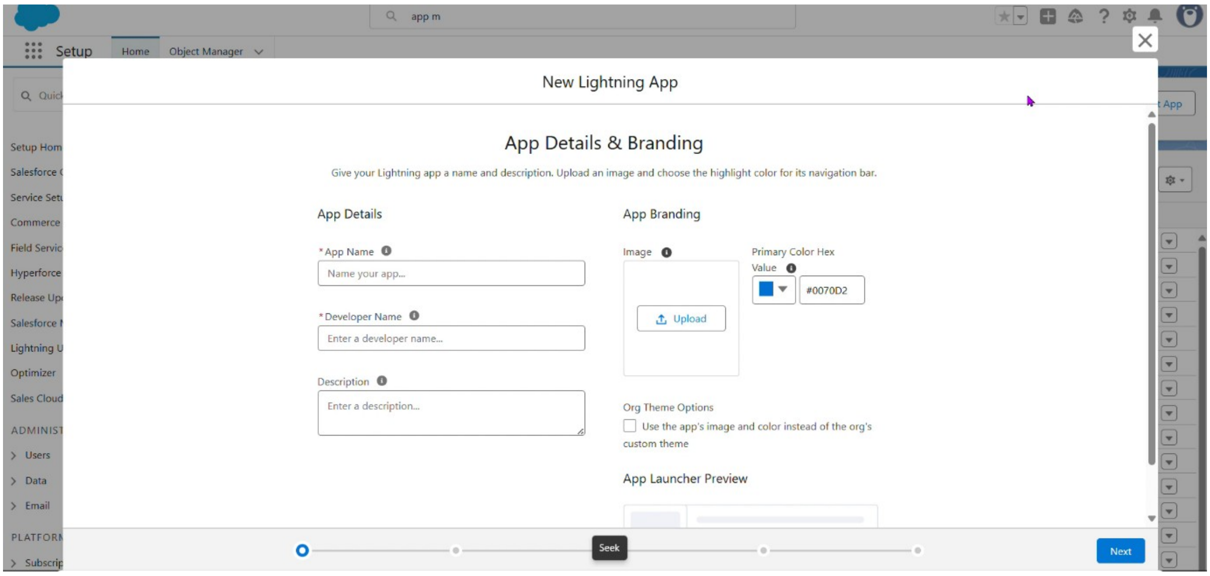

tabs
Setup
Home
Object Manager
Quick Find
Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
New Custom Object Tab
= Required Information
Select an existing custom object or create a new custom object now.
Object
Assest
Tab Style
Ship
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel
00:17:08
00:03:59



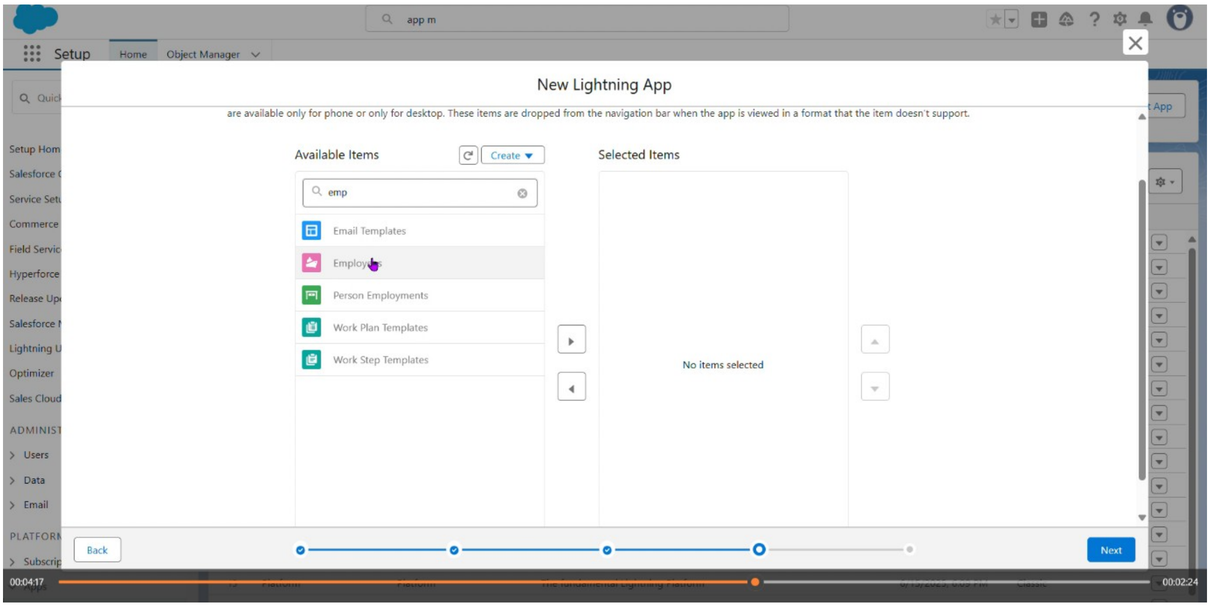


Step 8:

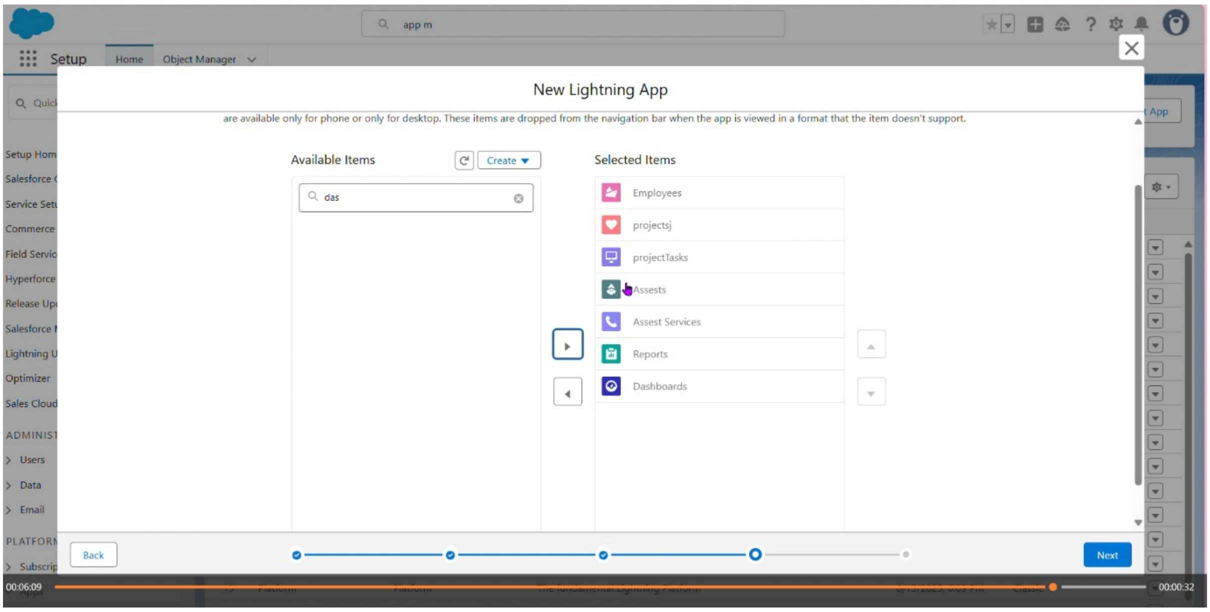
Creating lightening app

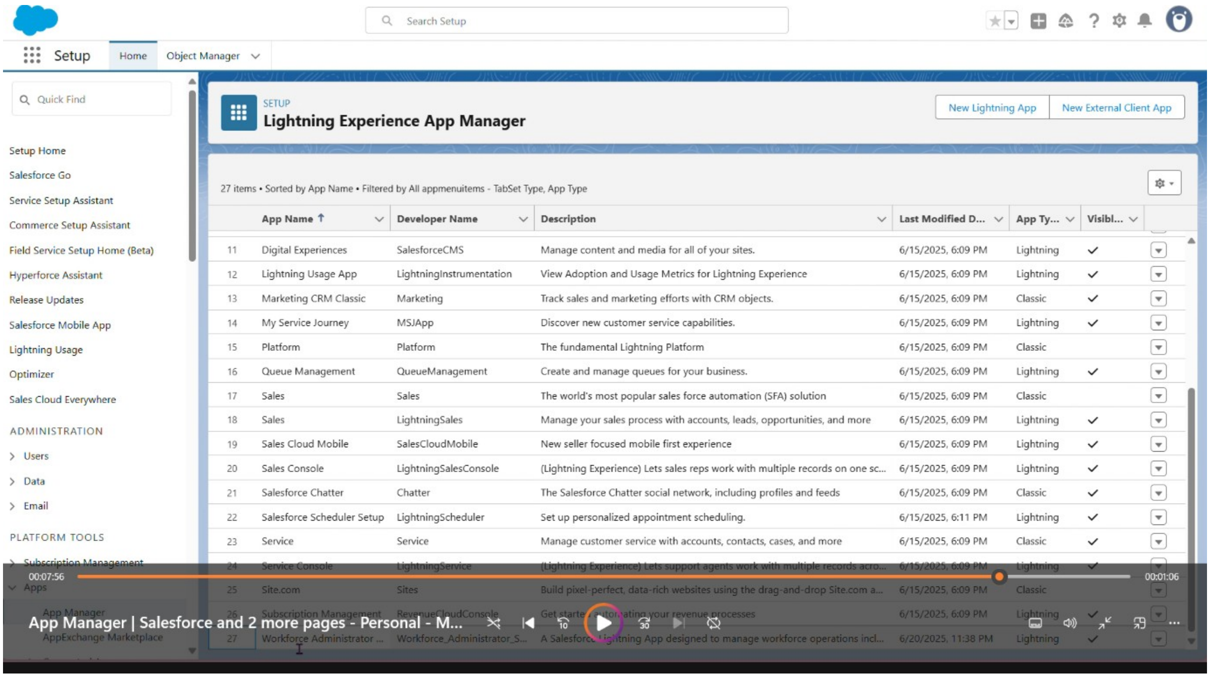


app m
Setup
Home
Object Manager
New Lightning App
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
App Branding
*App Name
Name your app...
*Developer Name
Enter a developer name...
Description
Enter a description...
Image
Upload
Primary Color Hex Value
#0070D2
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
Seek
Next



app m
Setup
Home
Object Manager
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
Create
Selected Items
emp
Email Templates
Person Employments
Work Plan Templates
Work Step Templates
No items selected
Back
Next
00:04:17
00:02:24

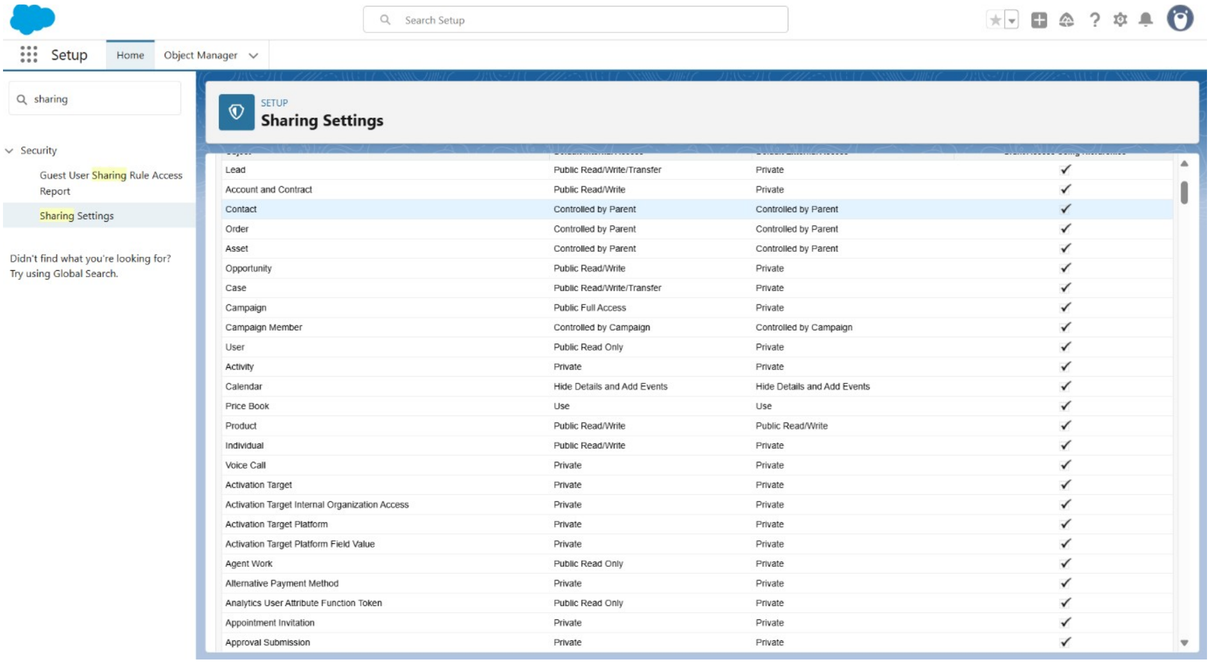


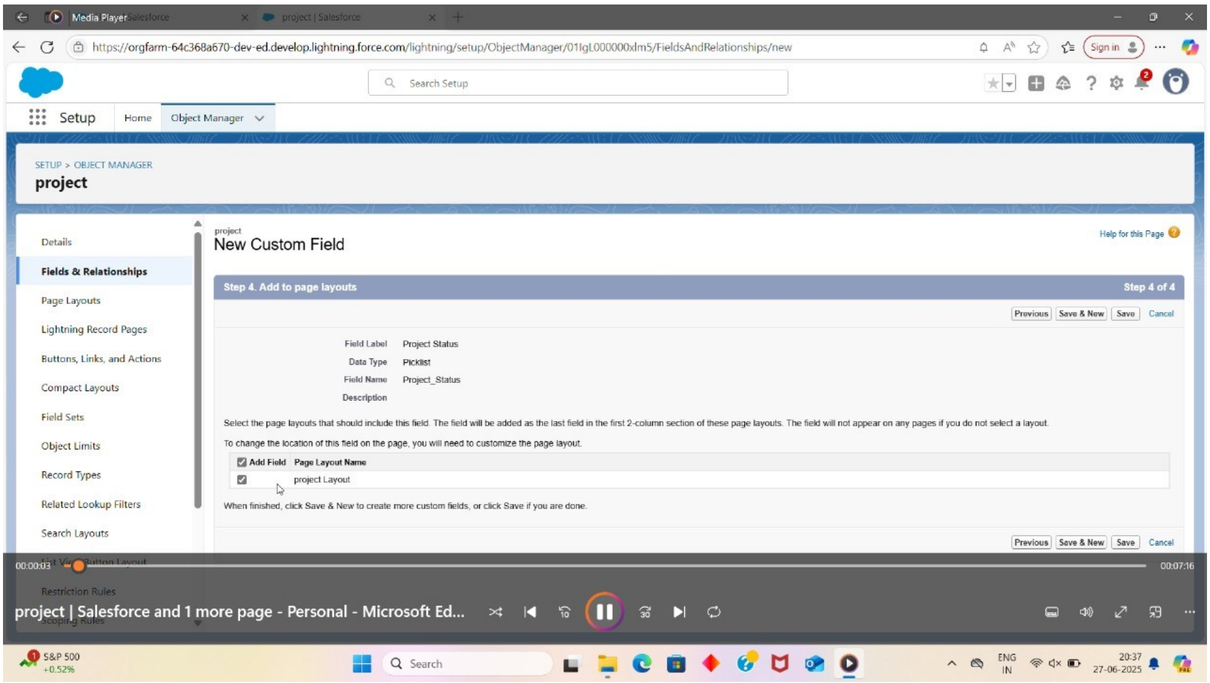


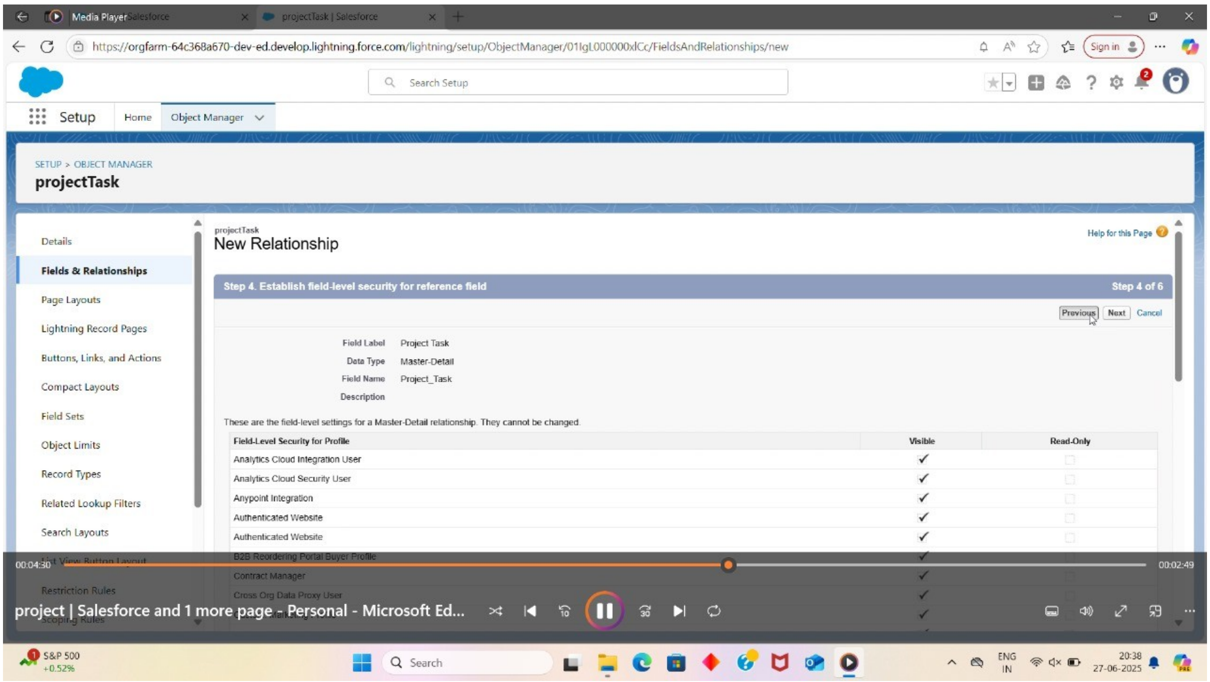
Step 9:

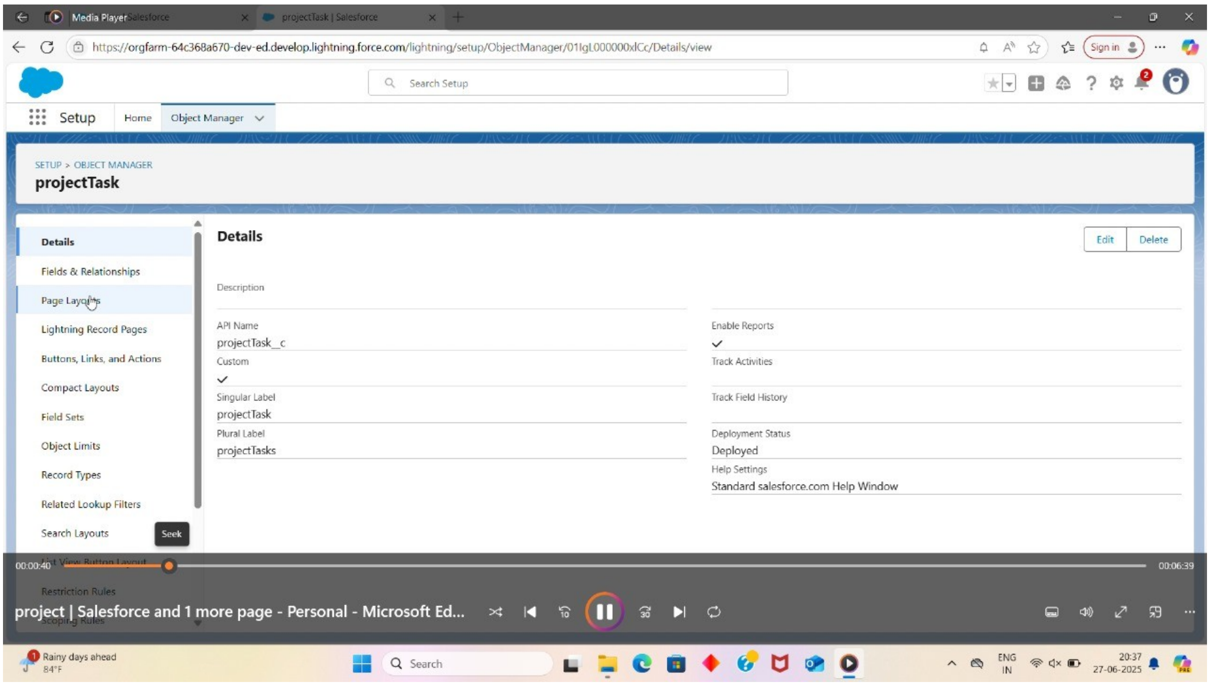
Creating fields and relationship

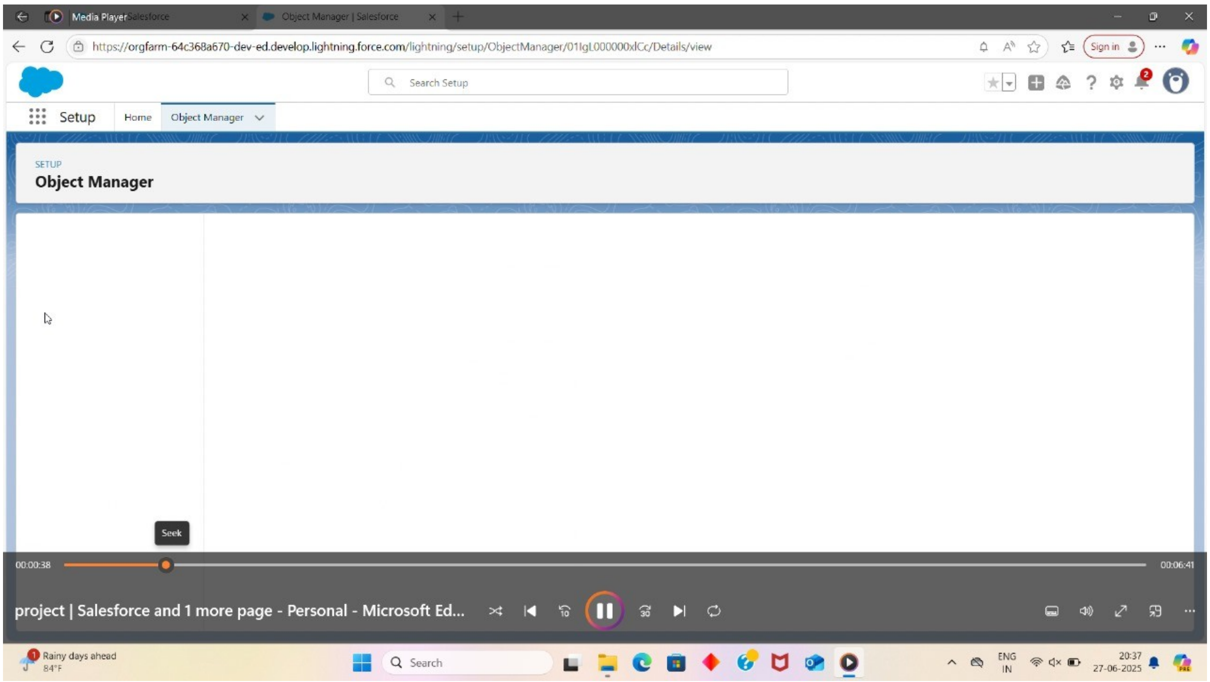
Setting owd

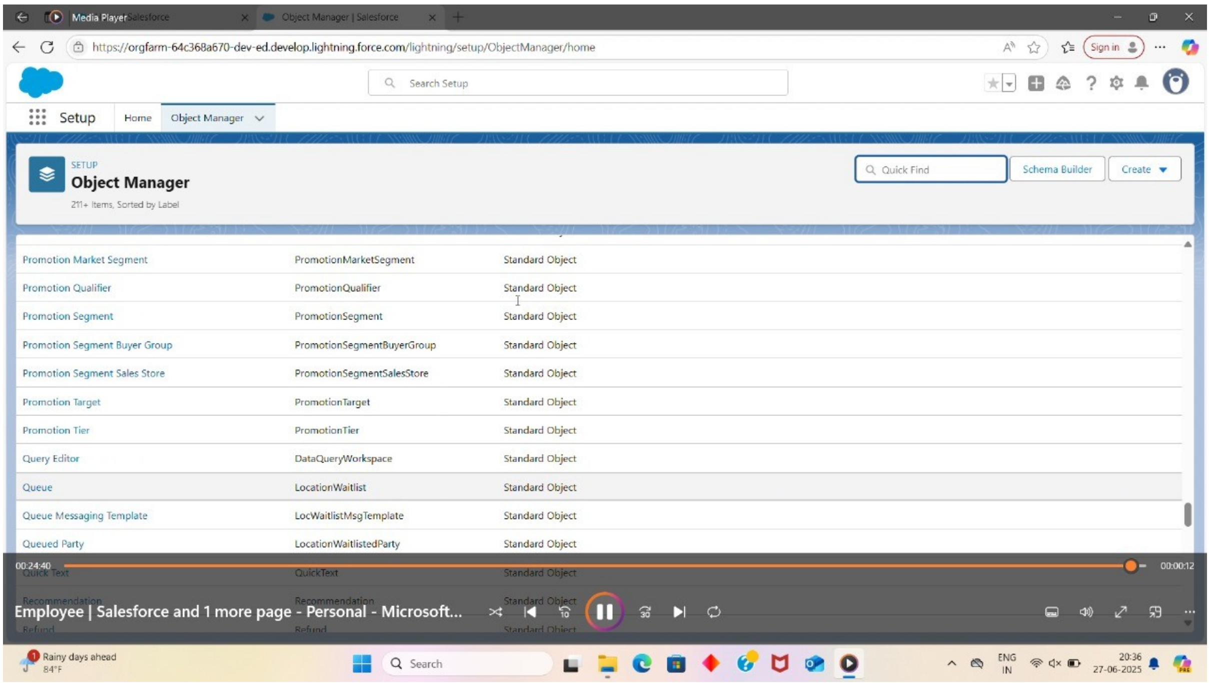

Search Setup
Setup
Home
Object Manager
sharing
Security
Guest User Sharing Rule Access Report
Sharing Settings
Didn't find what you're looking for? Try using Global Search.
SETUP
Sharing Settings
Lead Public Read/Write/Transfer Private
Account and Contract Public Read/Write Private
Contact Controlled 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

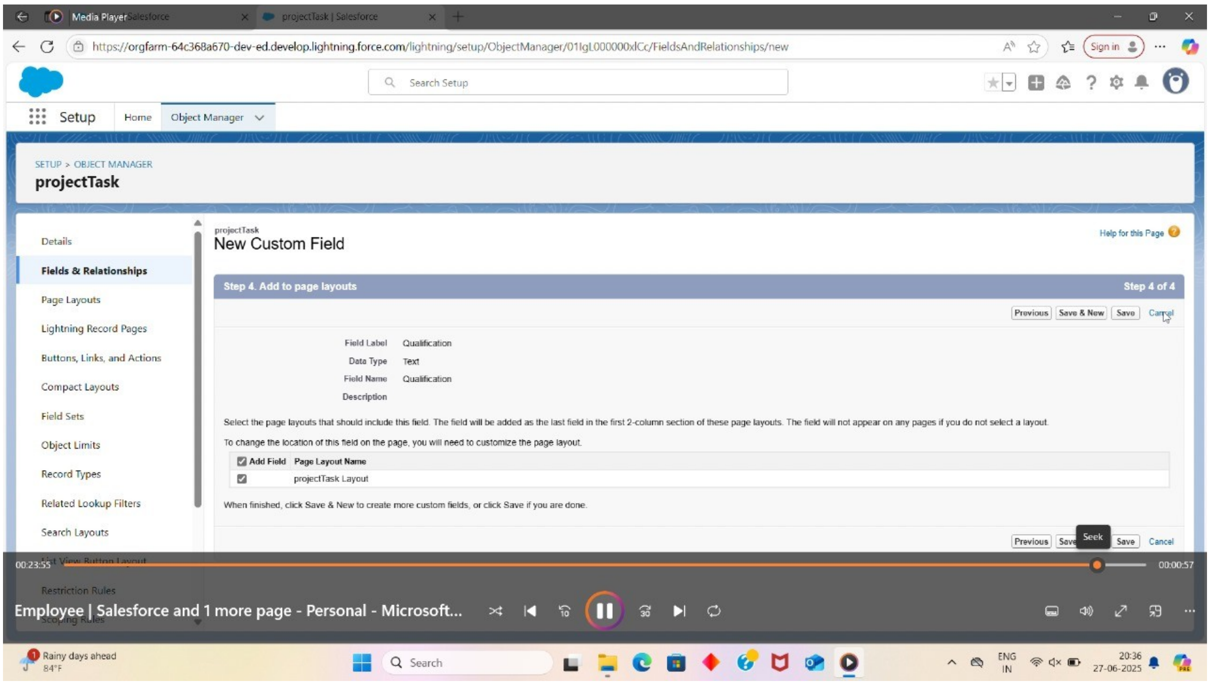

Media Player
project | Salesforce
https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000xlm5/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
project
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Restriction Rules
project
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label Project Status
Data Type Picklist
Field Name Project_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
project Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
00:00:03
00:07:16
project | Salesforce and 1 more page - Personal - Microsoft Ed...
S&P 500
+0.52%
Search
ENG
IN
20:37
27-06-2025


projectTask
New Relationship
Step 4. Establish field-level security for reference field
Step 4 of 6
Previous
Next
Cancel
Field Label Project Task
Data Type Master-Detail
Field Name Project_Task
Description
These are the field-level settings for a Master-Detail relationship. They cannot be changed.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Authenticated Website
Authenticated Website
project | Salesforce and 1 more page - Personal - Microsoft Ed...

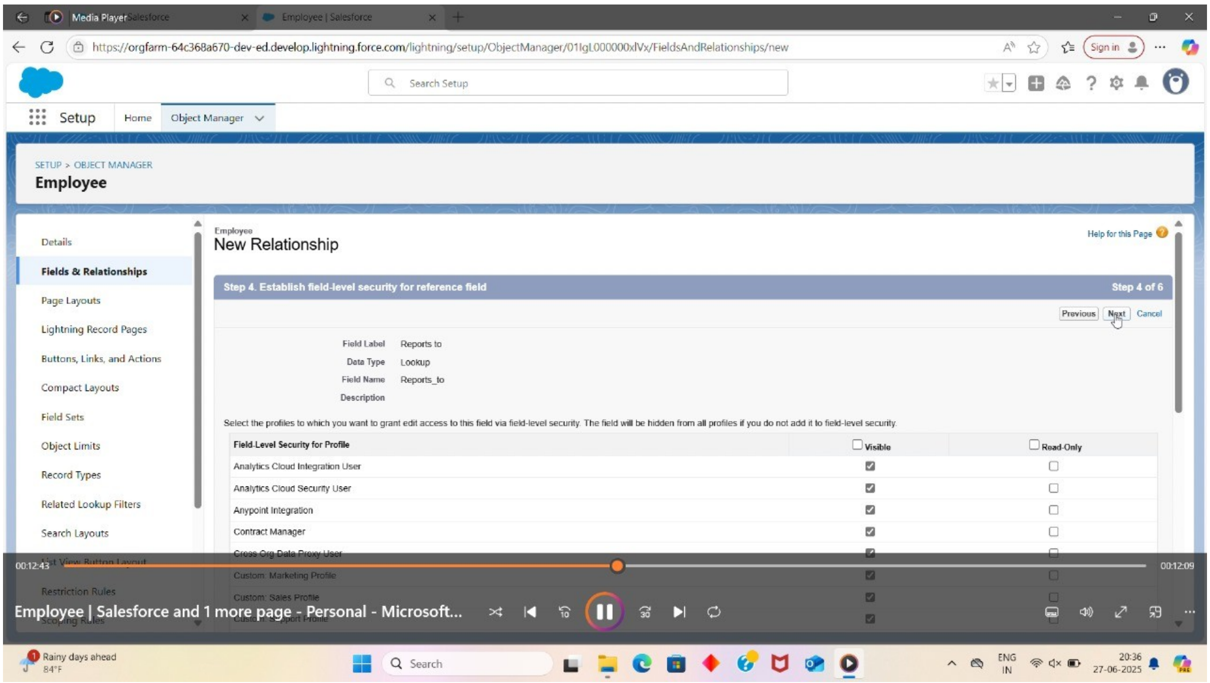

SETUP > OBJECT MANAGER
projectTask
Details
Edit
Delete
Description
API Name
projectTask__c
Custom
Singular Label
projectTask
Plural Label
projectTasks
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window
project | Salesforce and 1 more page - Personal - Microsoft Ed...


Media Player
Object Manager | Salesforce
https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000dCc/Details/view
Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
Seek
00:00:38
00:06:41
project | Salesforce and 1 more page - Personal - Microsoft Ed...
Rainy days ahead
84°F
Search
ENG
IN
20:37
27-06-2025

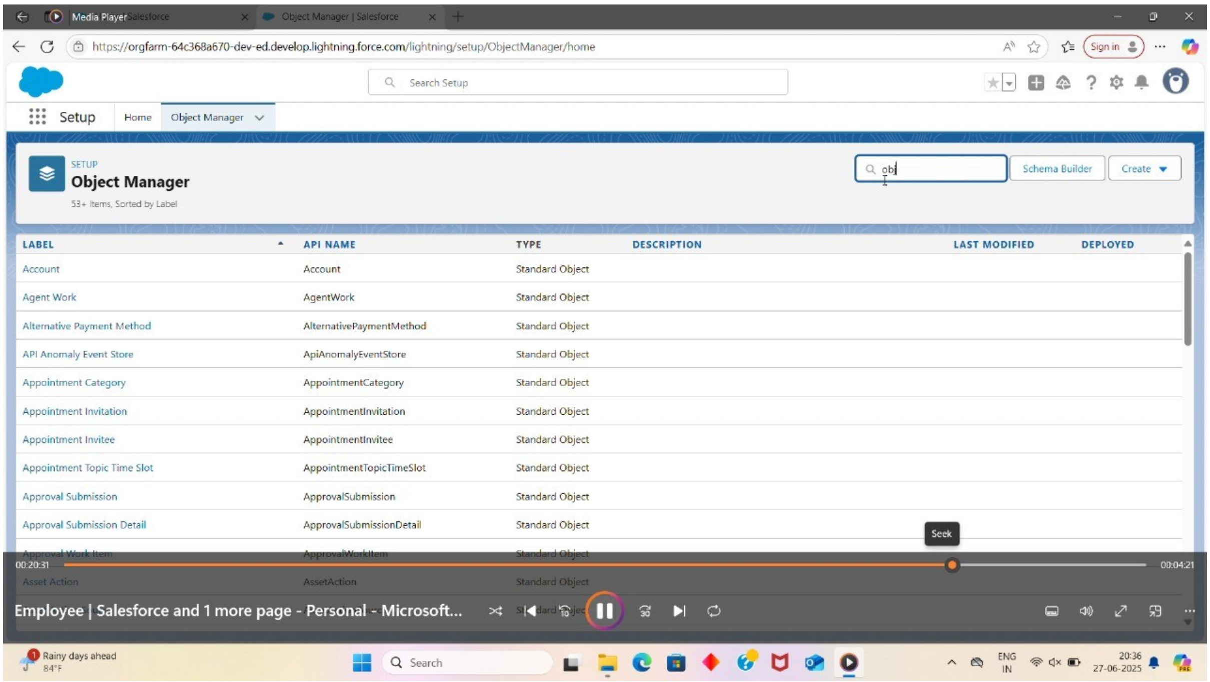

Media Player
Object Manager | Salesforce
https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home
Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
211+ Items, Sorted by Label
Quick Find
Schema Builder
Create
Promotion Market Segment
PromotionMarketSegment
Standard Object
Promotion Qualifier
PromotionQualifier
Standard Object
Promotion Segment
PromotionSegment
Standard Object
Promotion Segment Buyer Group
PromotionSegmentBuyerGroup
Standard Object
Promotion Segment Sales Store
PromotionSegmentSalesStore
Standard Object
Promotion Target
PromotionTarget
Standard Object
Promotion Tier
PromotionTier
Standard Object
Query Editor
DataQueryWorkspace
Standard Object
Queue
LocationWaitlist
Standard Object
Queue Messaging Template
LocWaitlistMsgTemplate
Standard Object
Queued Party
LocationWaitlistedParty
Standard Object
00:24:40
00:00:12
Employee | Salesforce and 1 more page - Personal - Microsoft...
Rainy days ahead
84°F
Search
ENG
IN
20:36
27-06-2025

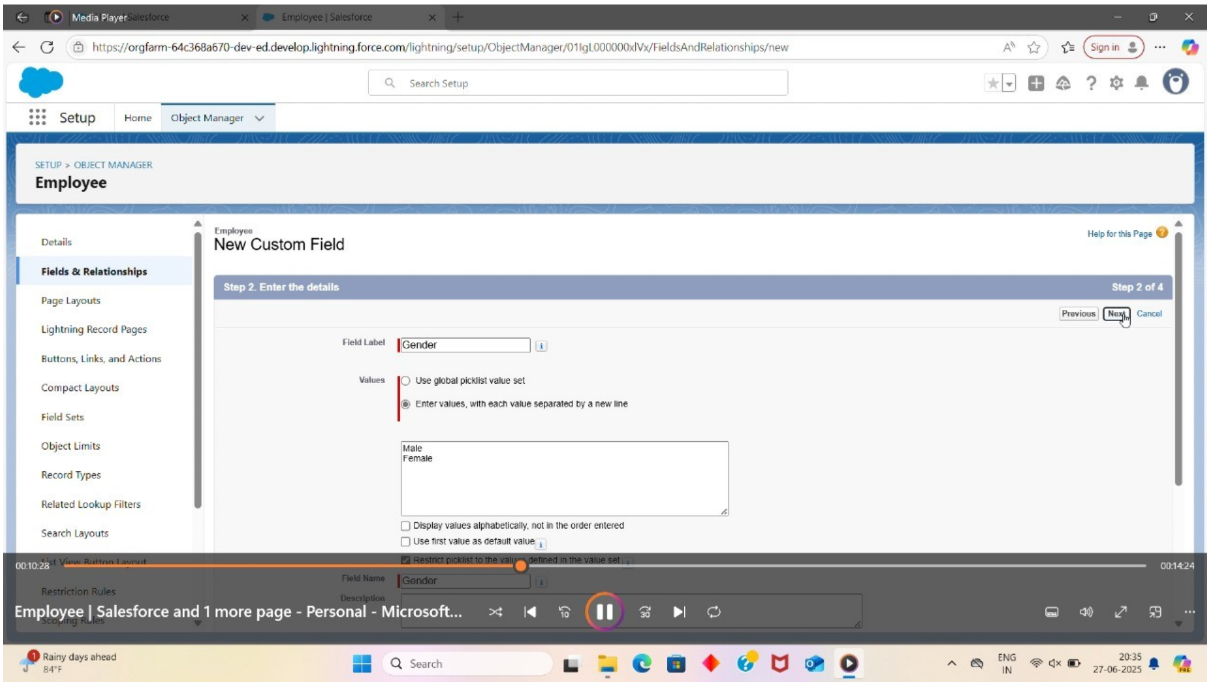


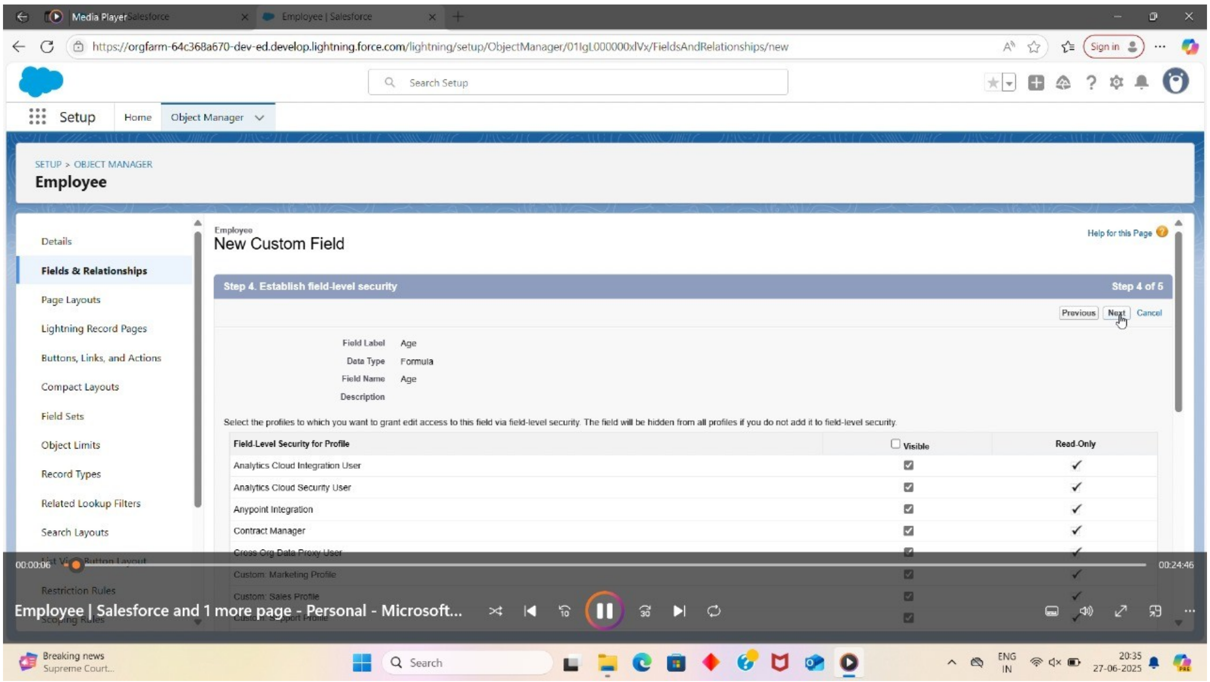
https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000xlCc/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
projectTask
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
projectTask
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
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.
To change the location of this field on the page, you will need to customize the page 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.
Employee | Salesforce and 1 more page - Personal - Microsoft...



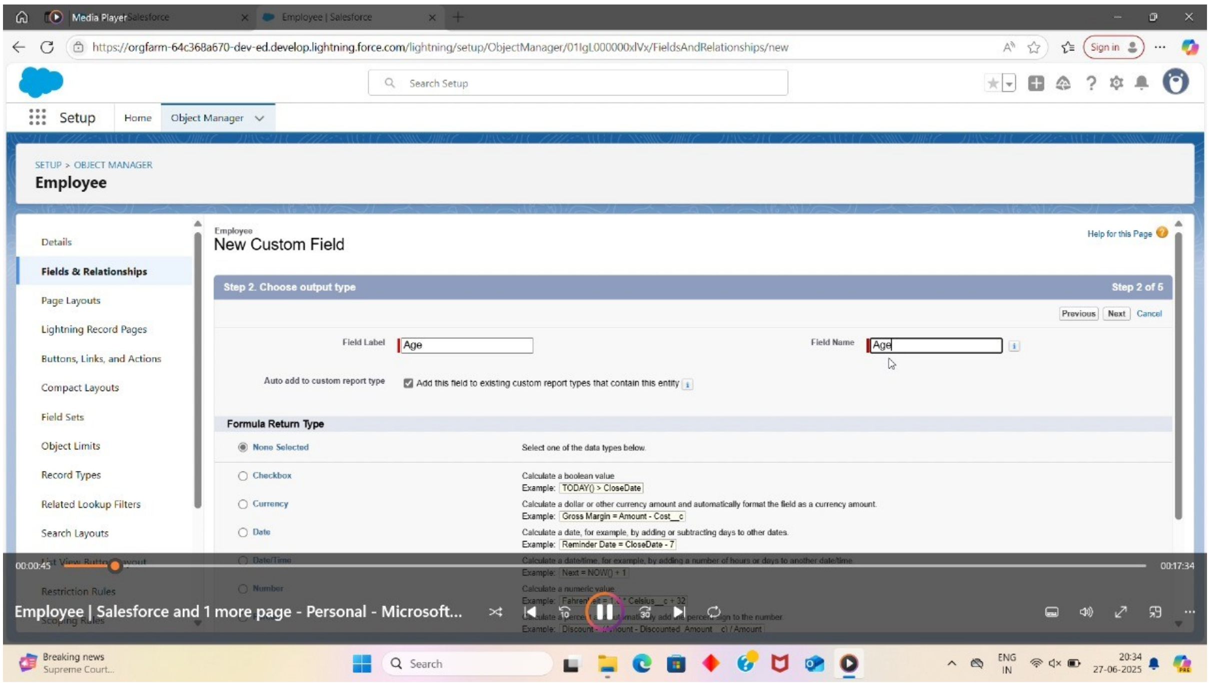
https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000xlVx/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Employee
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Employee
New Relationship
Help for this Page
Step 4. Establish field-level security for reference field
Step 4 of 6
Previous
Next
Cancel
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
Analytics Cloud Security User
Anypoint Integration
Contract Manager
Employee | Salesforce and 1 more page - Personal - Microsoft...


Media Player
Object Manager | Salesforce
https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home
Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
53+ Items, Sorted by Label
obj
Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
Account
Account
Standard Object
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
Seek
00:20:31
00:04:21
Employee | Salesforce and 1 more page - Personal - Microsoft...
Rainy days ahead
84°F
Search
ENG
IN
20:36
27-06-2025

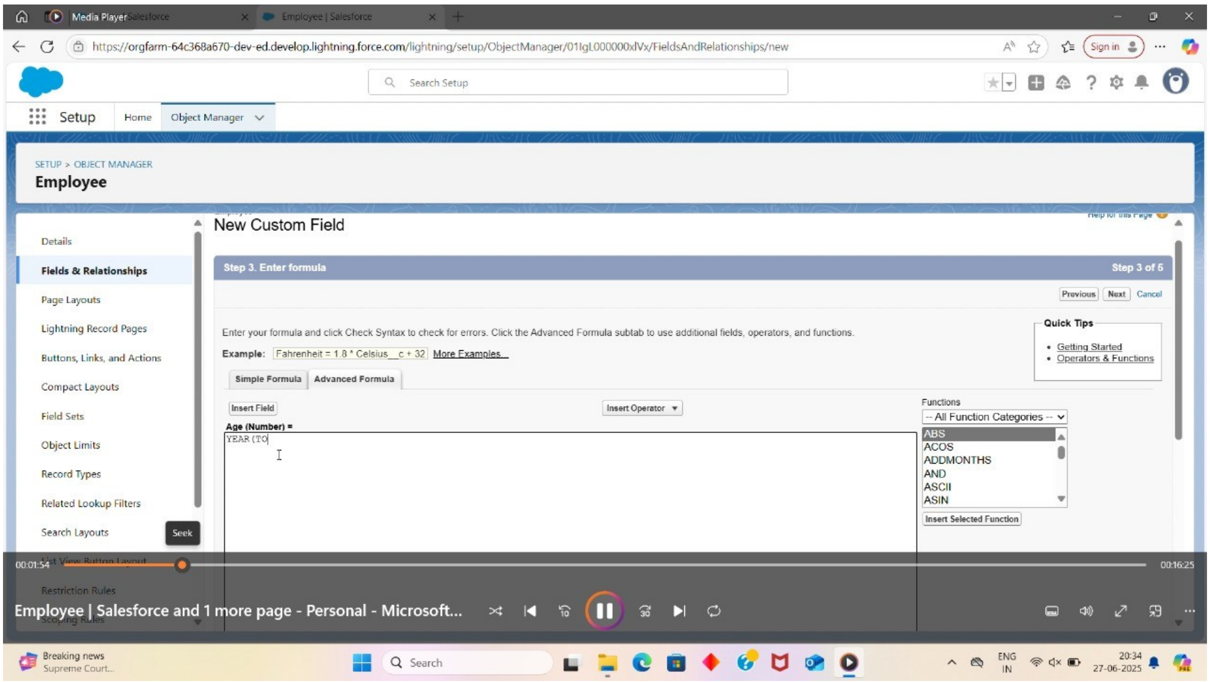

Media Player
Employee | Salesforce
https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000xlVx/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Employee
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Employee
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
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
00:10:28
00:14:24
Employee | Salesforce and 1 more page - Personal - Microsoft...
Rainy days ahead
84°F
Search
ENG
IN
20:35
27-06-2025

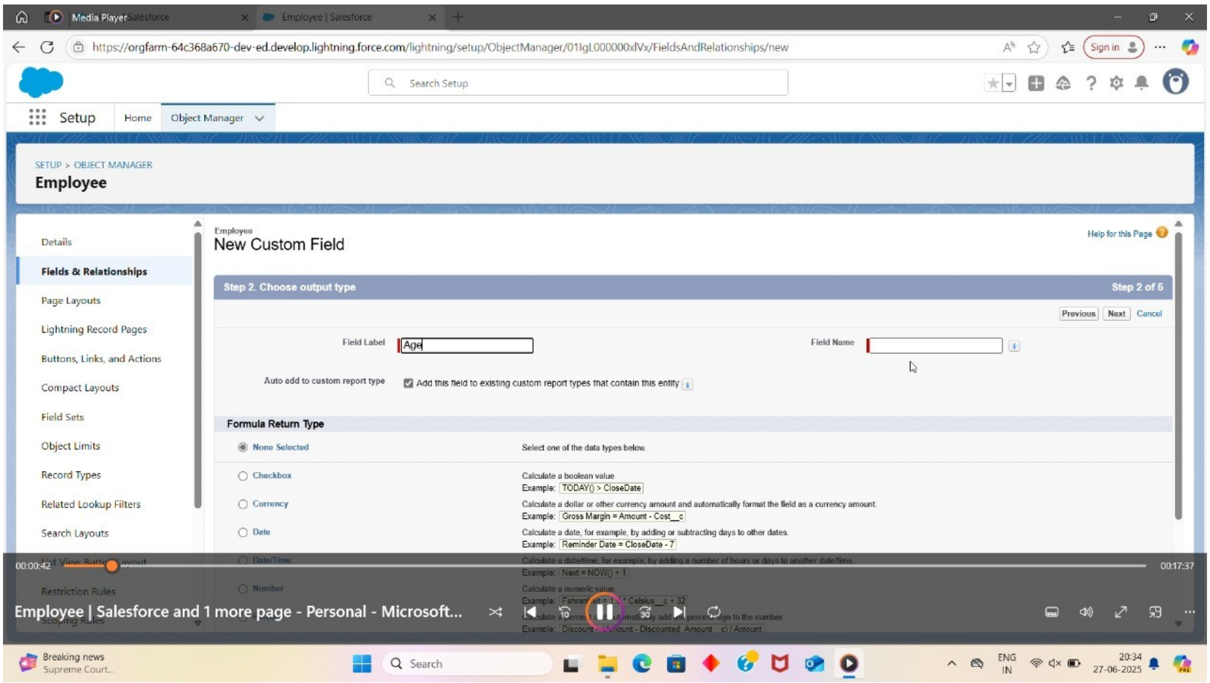


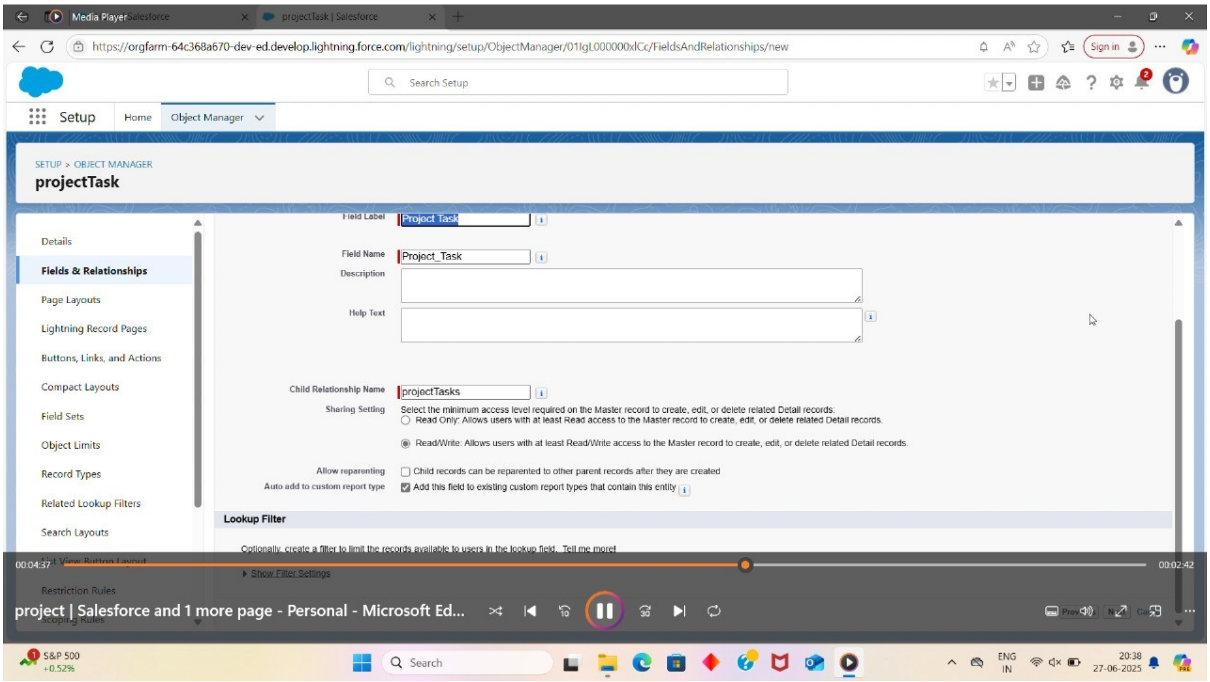
SETUP > OBJECT MANAGER
Employee
New Custom Field
Step 4. Establish field-level security
Step 4 of 5
Field Label Age
Data Type Formula
Field Name Age
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Contract Manager
Employee | Salesforce and 1 more page - Personal - Microsoft...

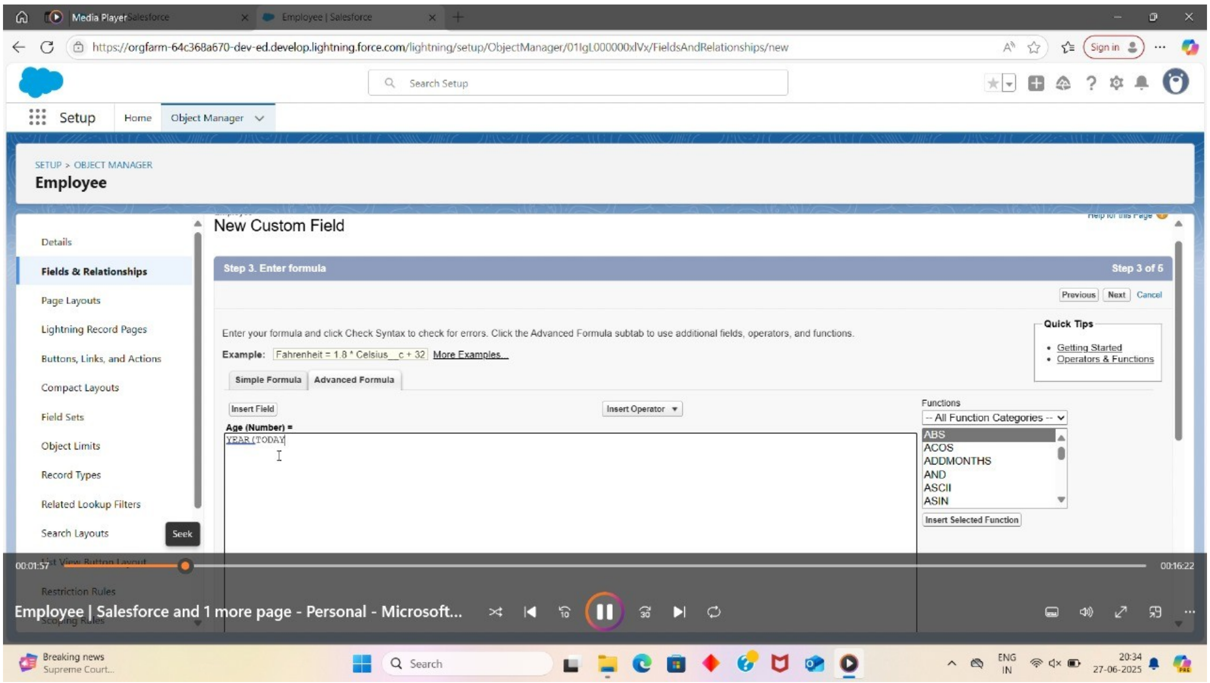


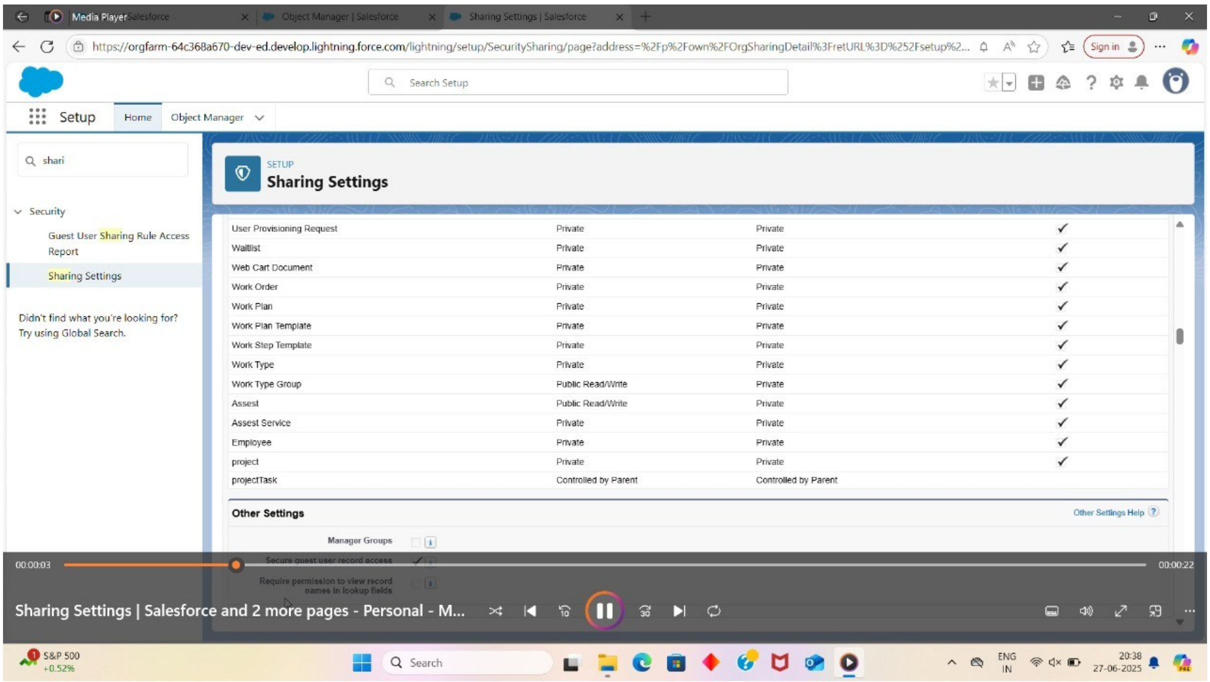
SETUP > OBJECT MANAGER
Employee
New Custom Field
Step 2. Choose output type
Step 2 of 5
Field Label Age
Field Name Age
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Formula Return Type
None Selected
Select one of the data types below.
Checkbox
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
Employee | Salesforce and 1 more page - Personal - Microsoft...

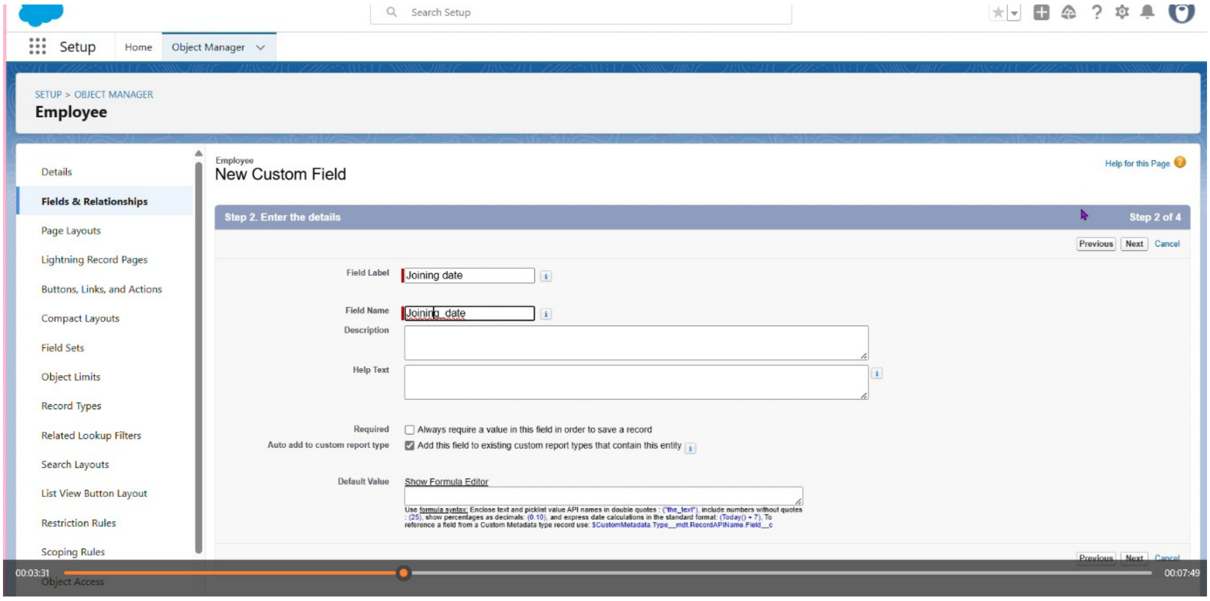

New Custom Field
Step 3. Enter formula
Step 3 of 5
Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
Age (Number) =
YEAR(TO
Employee | Salesforce and 1 more page - Personal - Microsoft...


New Custom Field
Step 2. Choose output type
Step 2 of 5
Field Label
Age
Field Name
Formula Return Type
Employee | Salesforce and 1 more page - Personal - Microsoft...



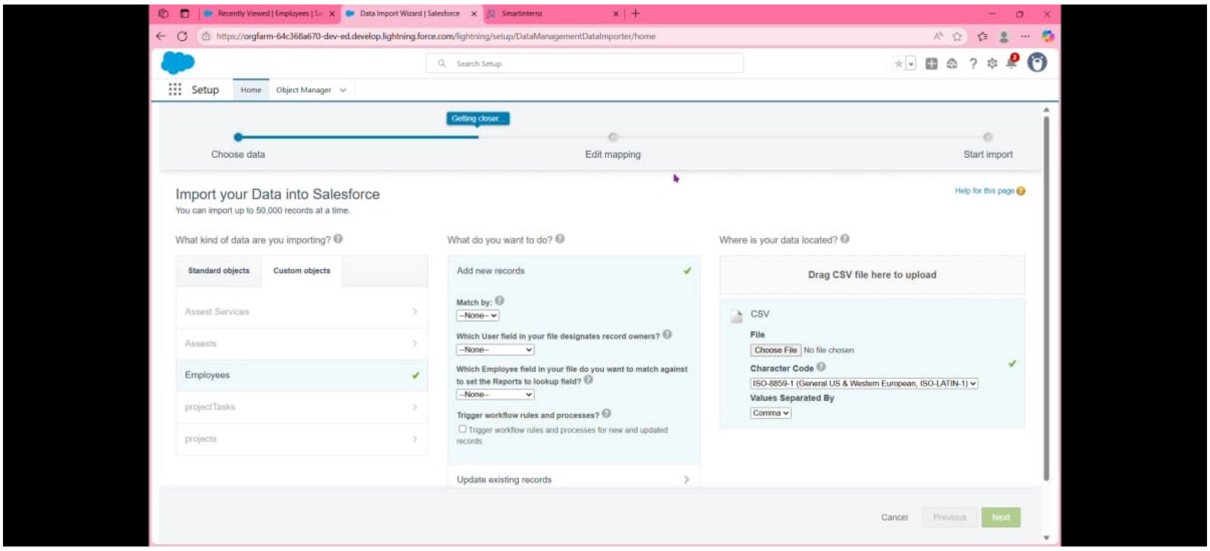




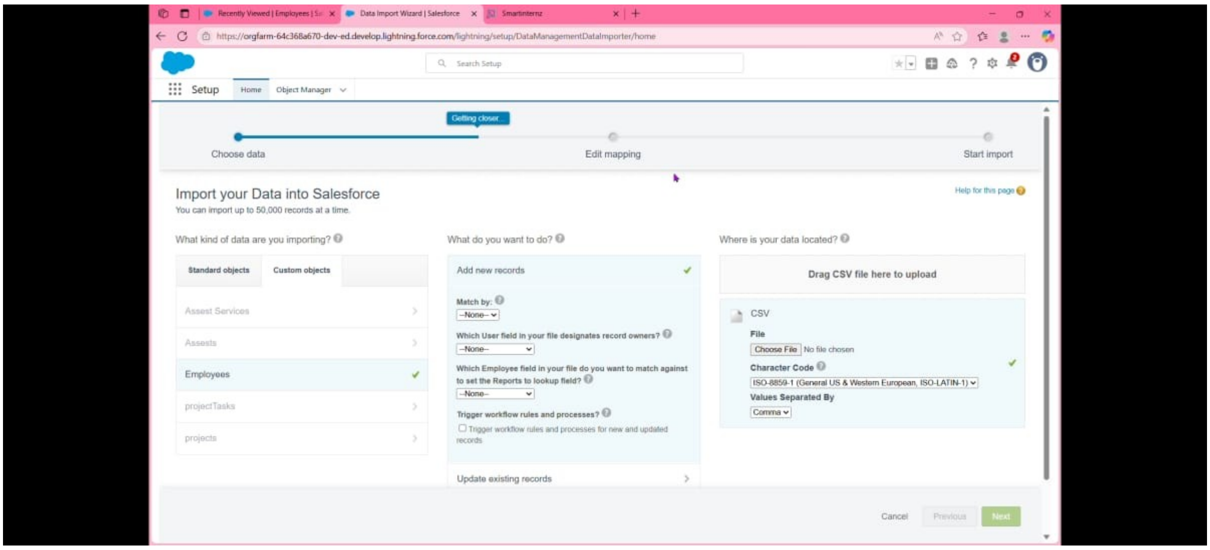


Step :

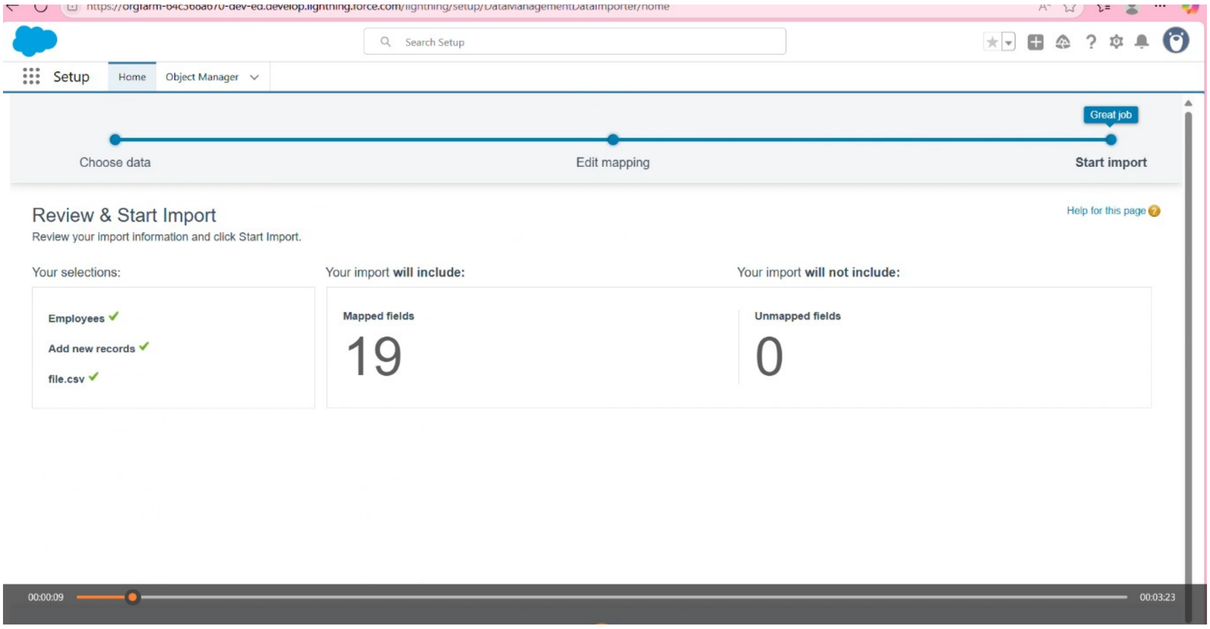
Import data Wizard



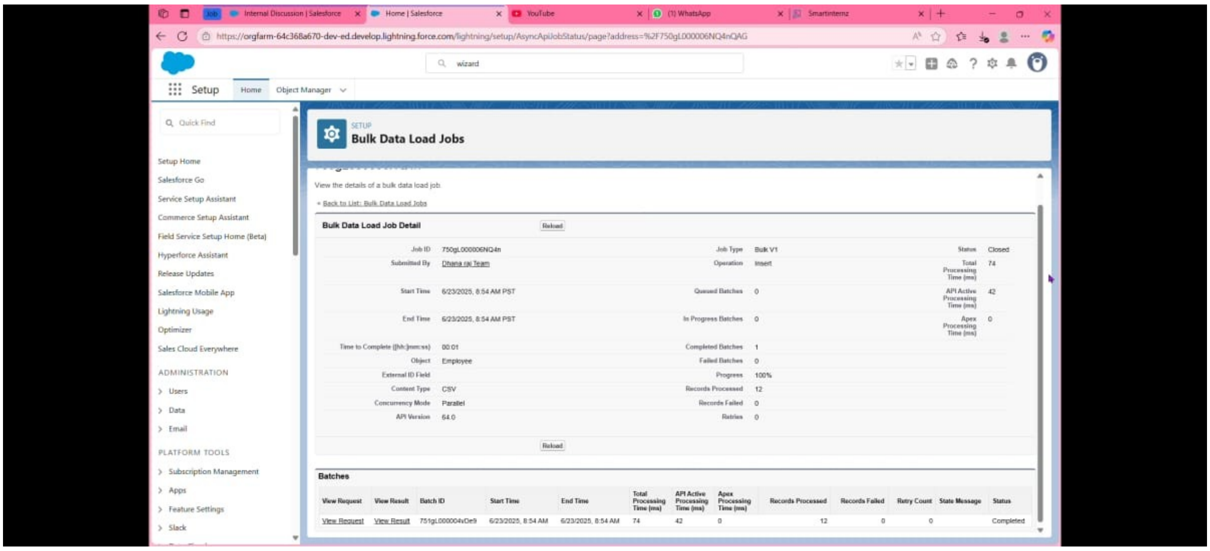
Getting closer...
Choose data
Edit mapping
Start import
Import your Data into Salesforce
You can import up to 50,000 records at a time.
What kind of data are you importing?
What do you want to do?
Where is your data located?
Standard objects
Custom objects
Asset Services
Assets
Employees
projectTasks
projects
Add new records
Update existing records
Drag CSV file here to upload
CSV
Character Code
Values Separated By
Cancel
Previous
Next



Getting closer...
Choose data
Edit mapping
Start import
Import your Data into Salesforce
You can import up to 50,000 records at a time.
What kind of data are you importing?
What do you want to do?
Where is your data located?
Standard objects
Custom objects
Asset Services
Assets
Employees
projectTasks
projects
Add new records
Update existing records
Drag CSV file here to upload
CSV
Character Code
Values Separated By
Cancel
Previous
Next



Selected the file in the csv format

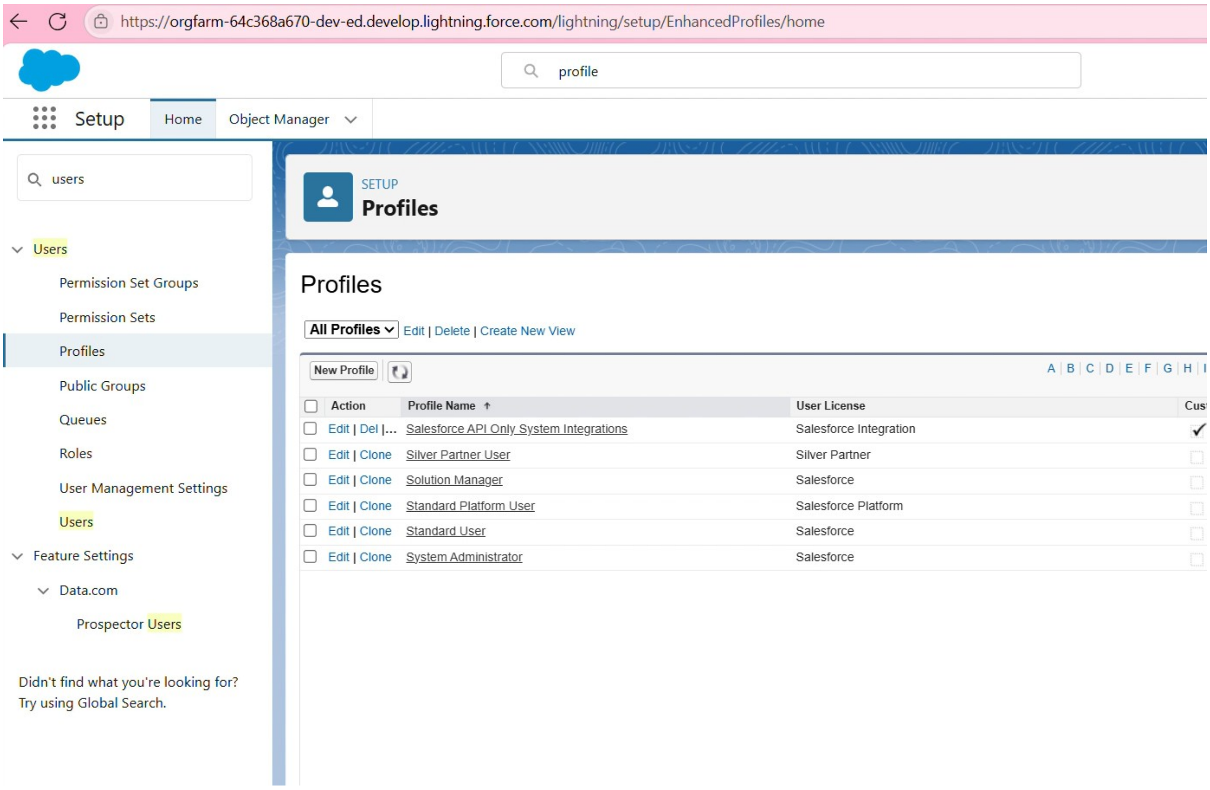


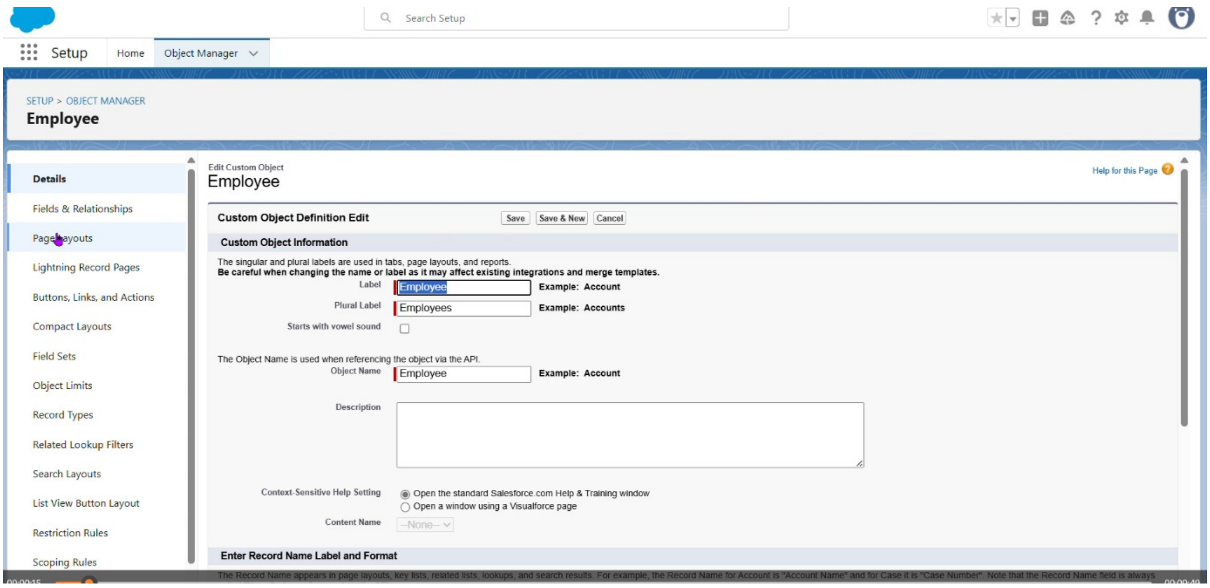
sucessally imported data without any errors

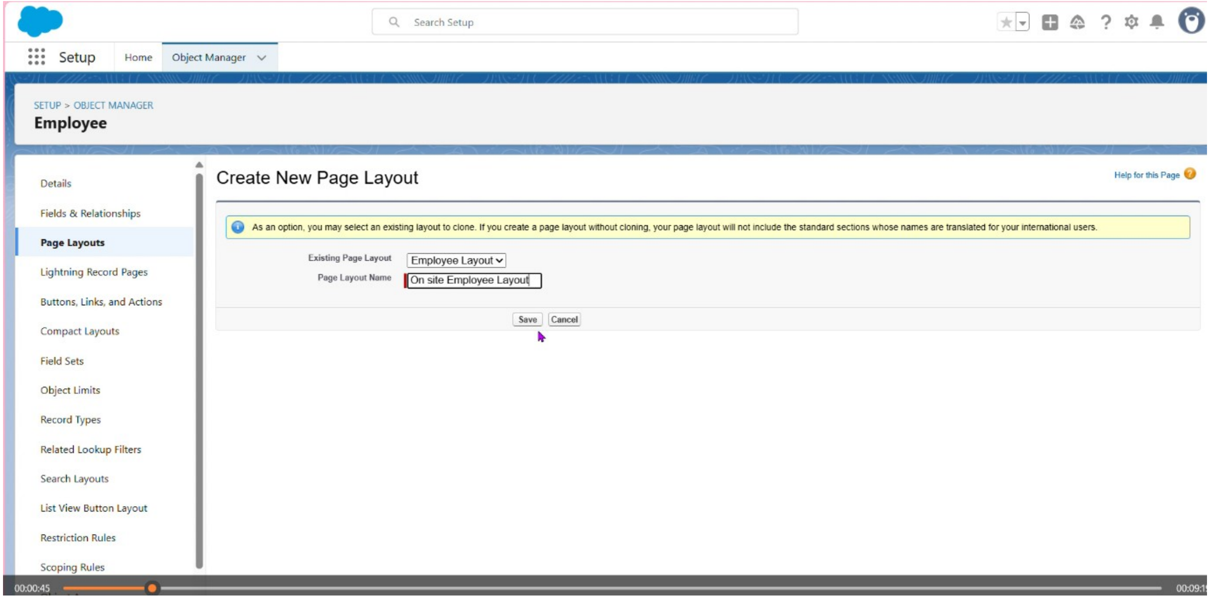
step :

profiles

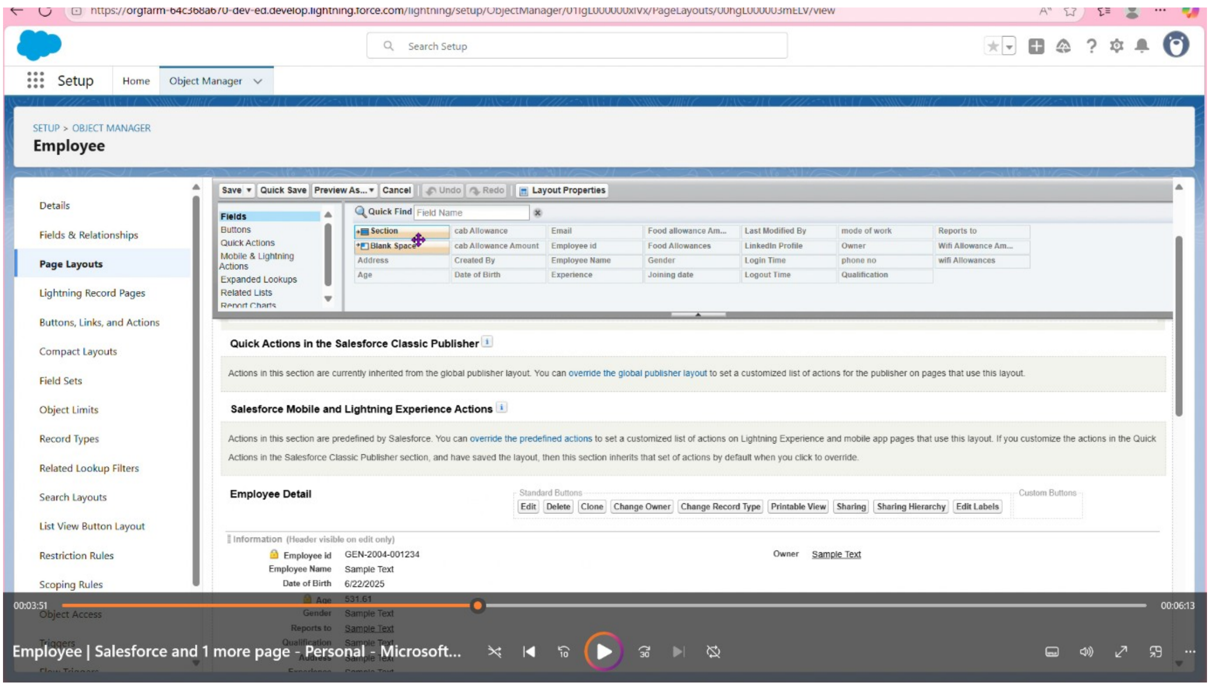
(HR profile ,manag profile,Employee profile)

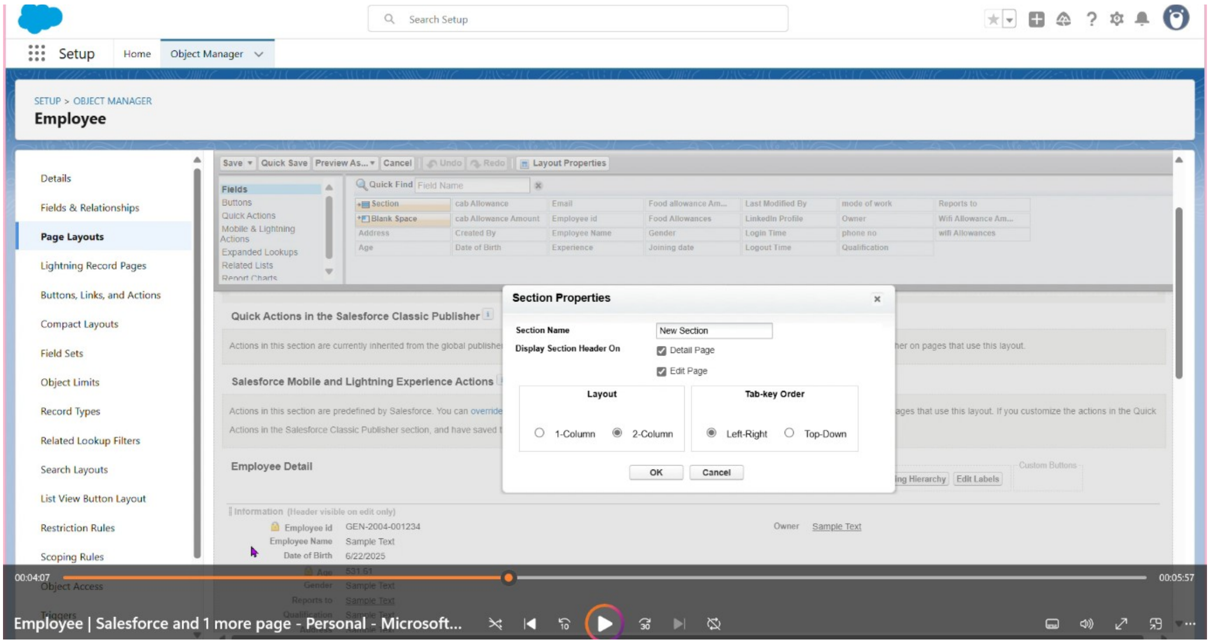

https://orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home
profile
Setup
Home
Object Manager
users
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Profiles
All Profiles
Edit | Delete | Create New View
New Profile
A | B | C | D | E | F | G | H | I
Action
Profile Name
User License
Cus
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


Search Setup
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
List View Button Layout
Restriction Rules
Scoping Rules
Edit Custom Object
Employee
Help for this Page
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
Employee
Example: Account
Plural Label
Employees
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
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
--None--
Enter Record Name Label and Format

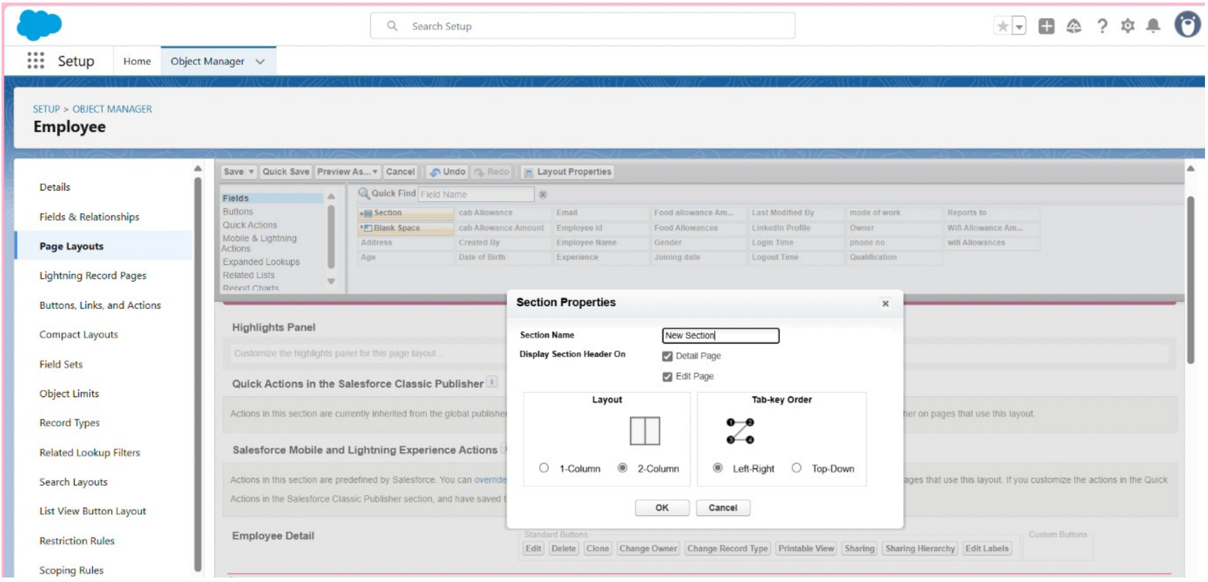


Created Employment layout

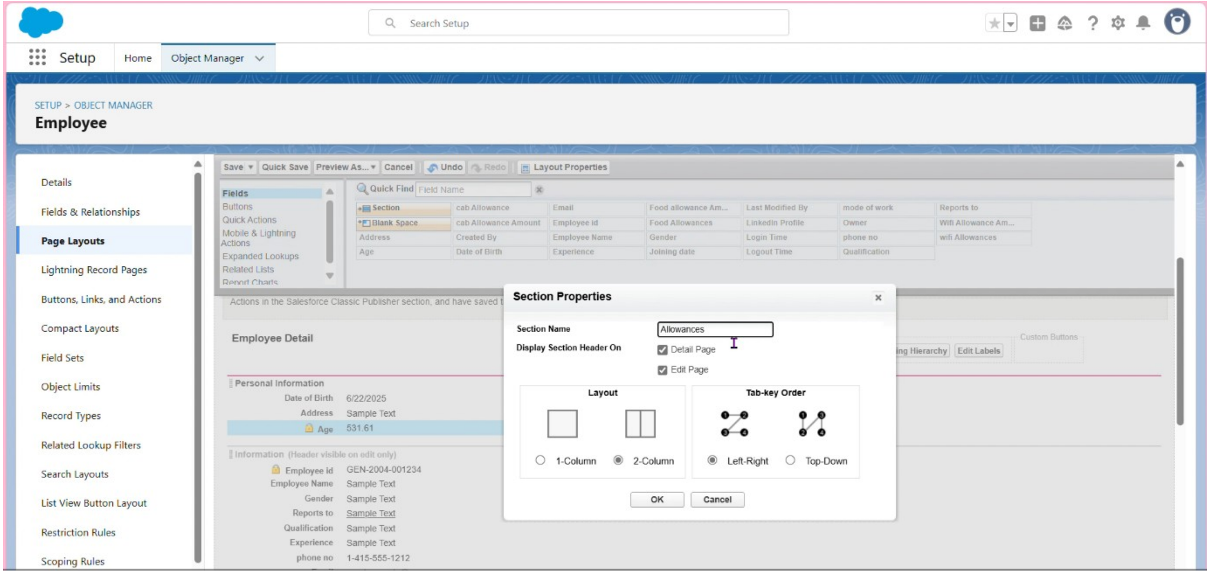




Again created new section

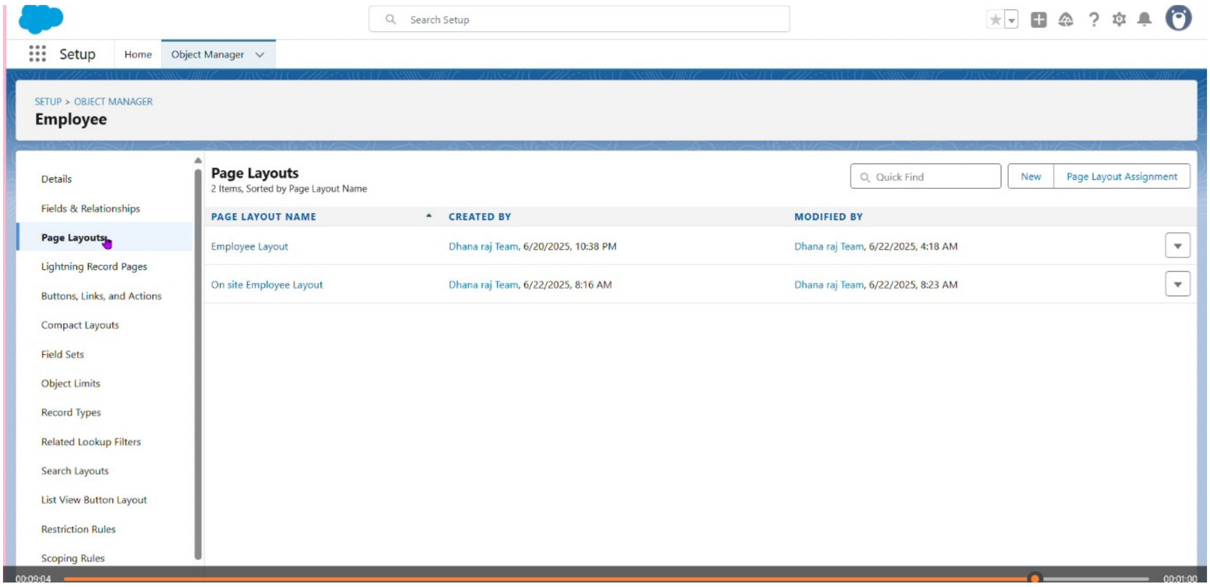


Added allowance

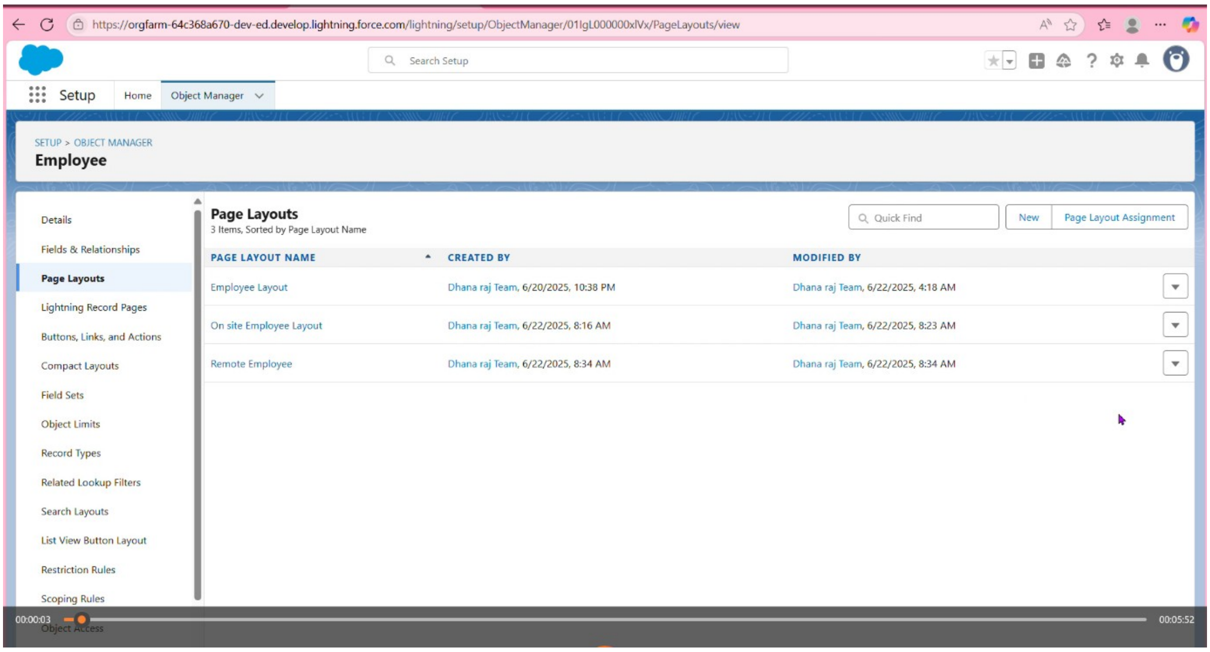


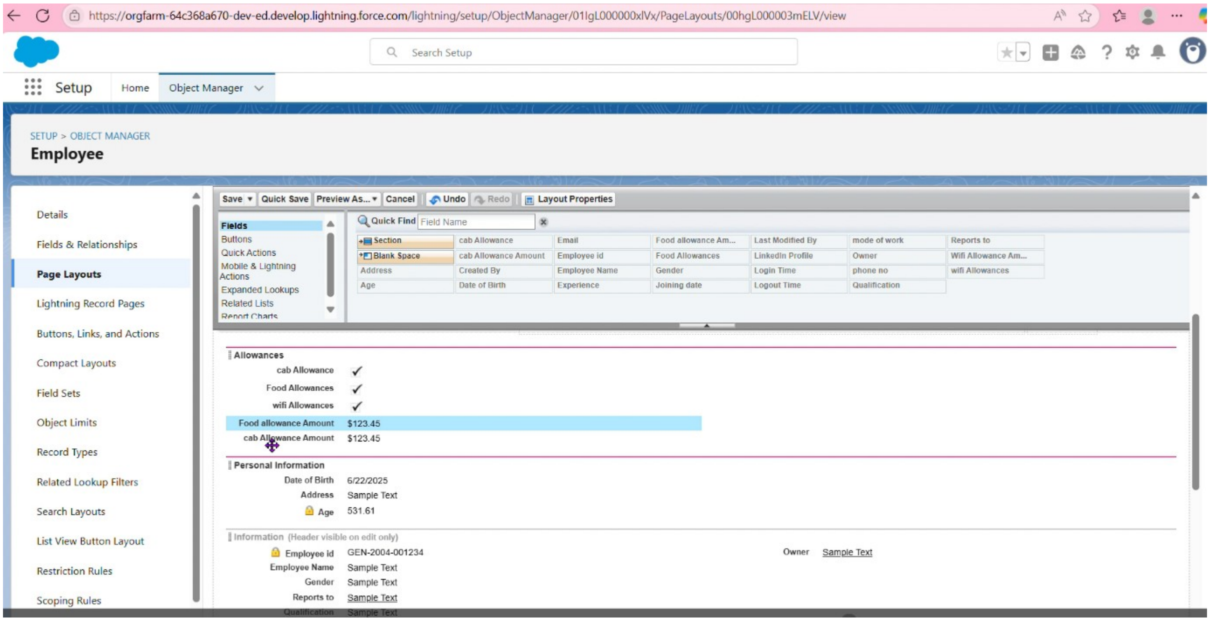
Created all fields

Created employee layout and on _site layout

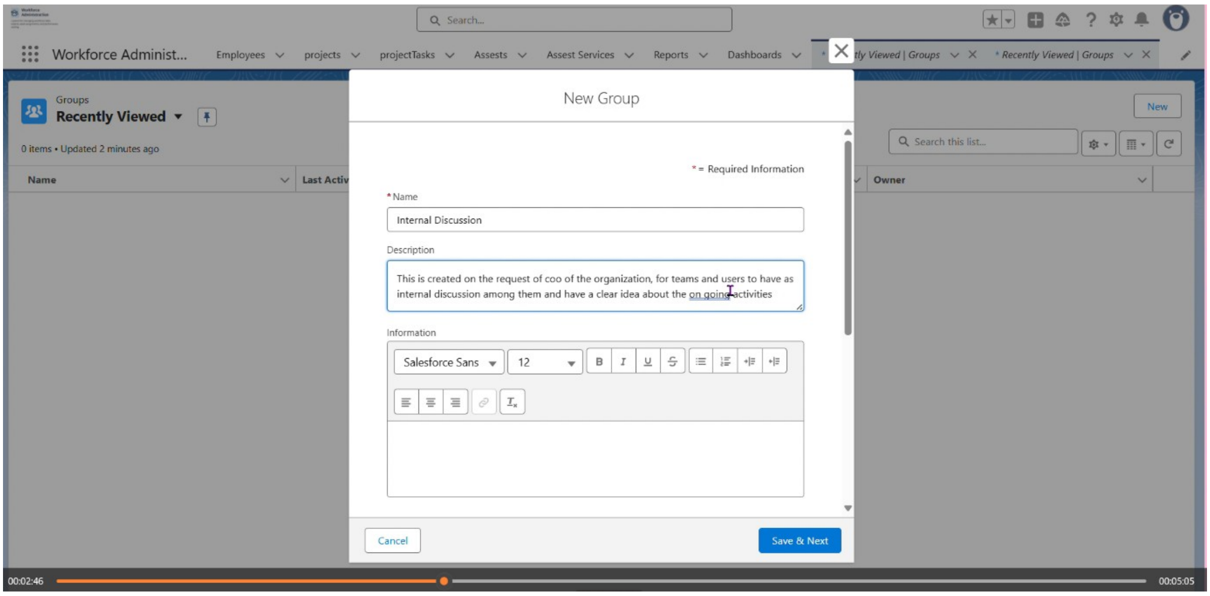


Page layouts:

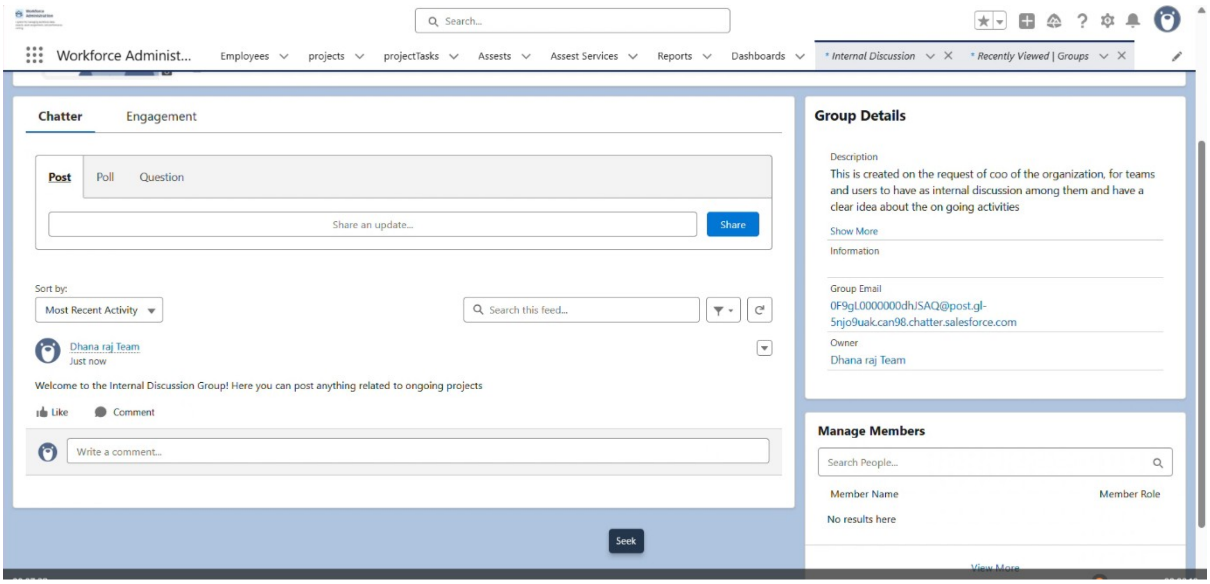




Chatter Group:



f



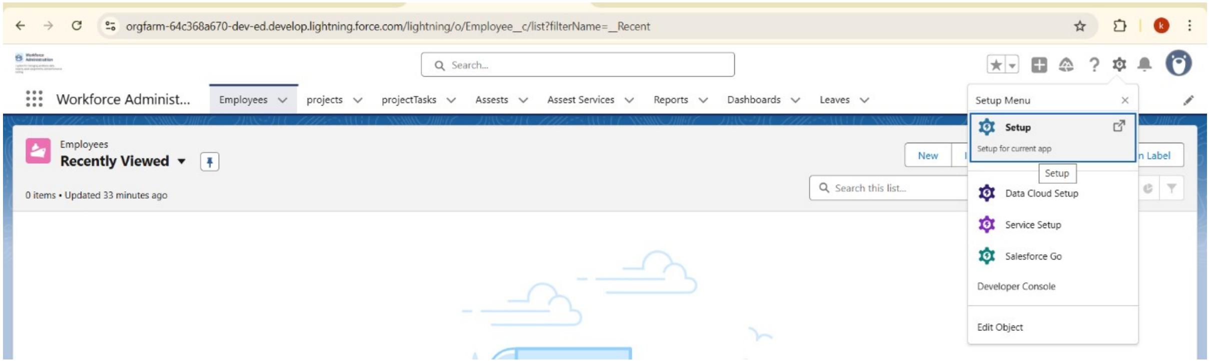
finally created Chatter group

6.14 Record Types:

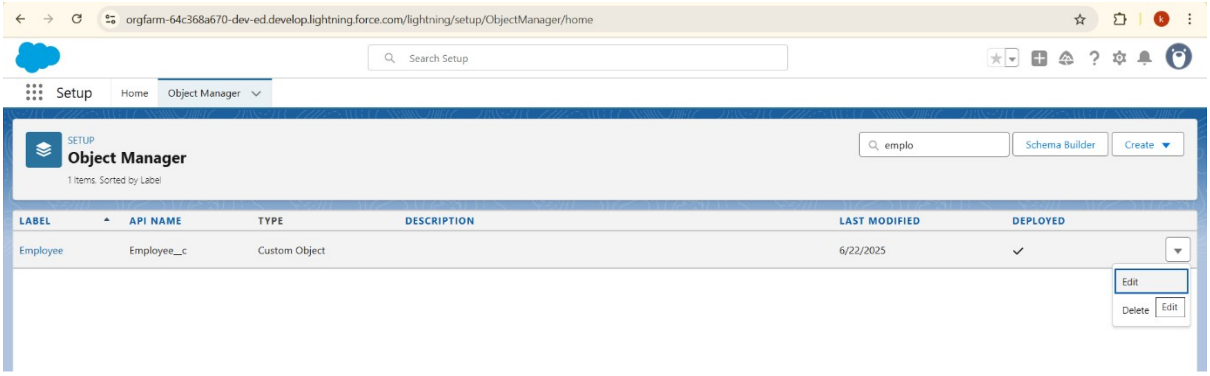
Creating On Site Employee Record Type

To Create a Record Type:

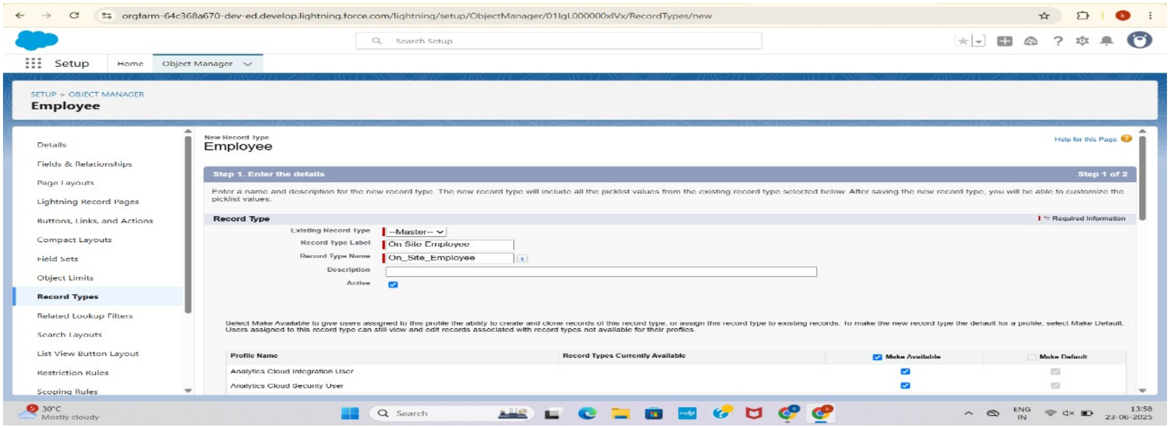
Go to Setup



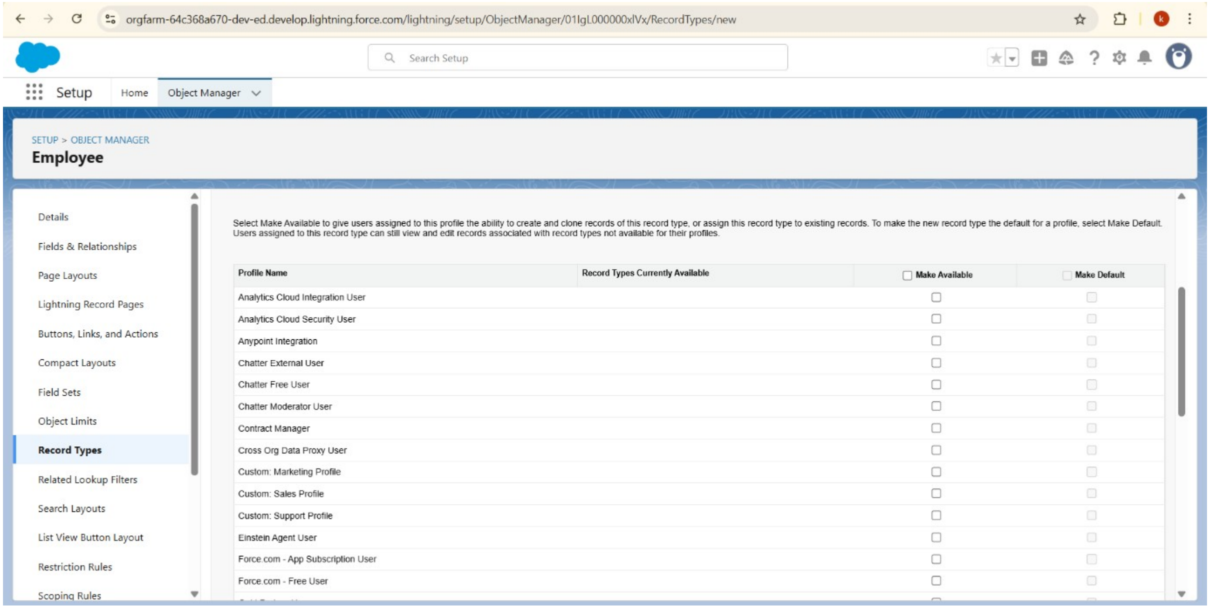
Click on Object Manager and Search for Object Employee then click on edit from drop down



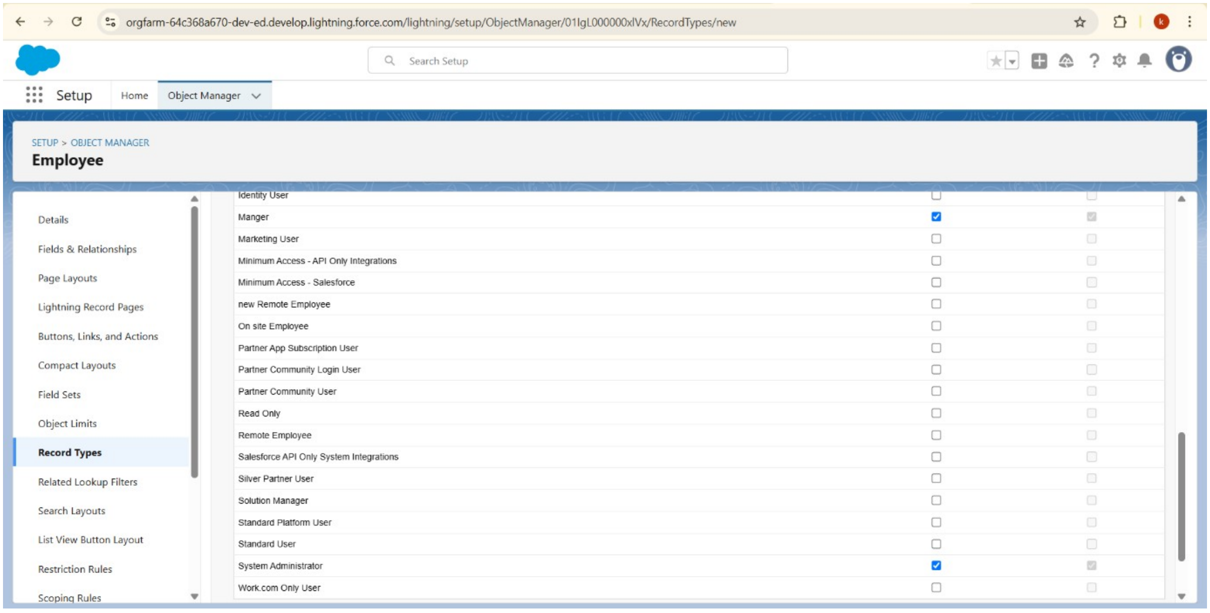
From the panel click Record Types then Select New and Give Record Type Label as “On Site Employee” and make it active



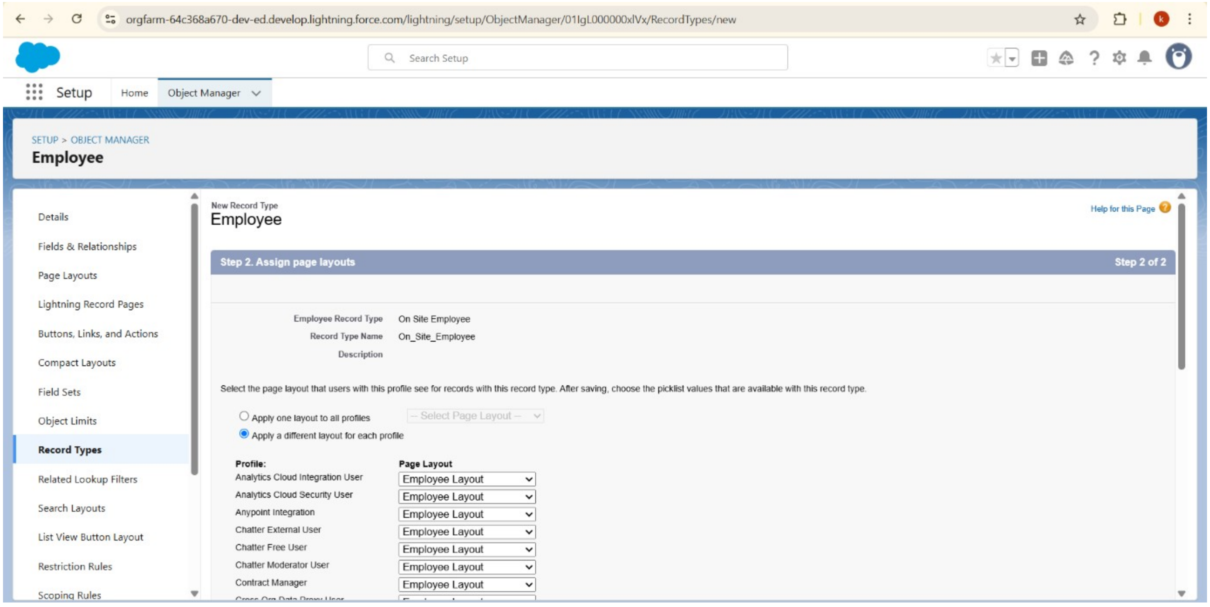
Uncheck for “Make Available”.



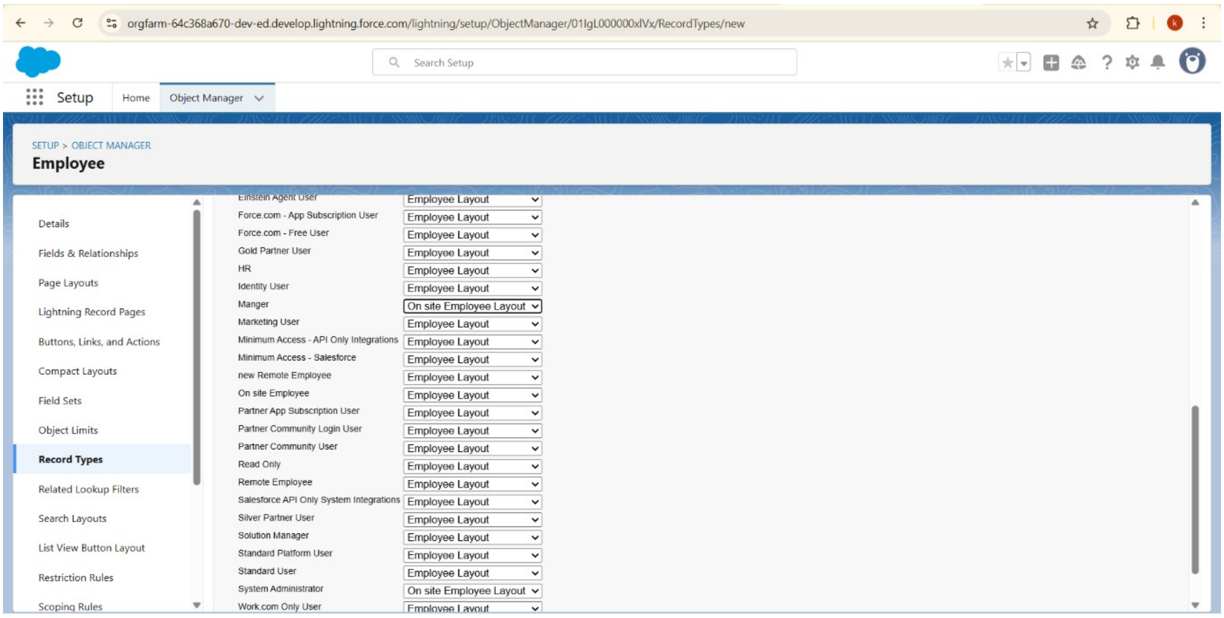
Scroll down and check for the Manager & System Administrator profile and click on Next.



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

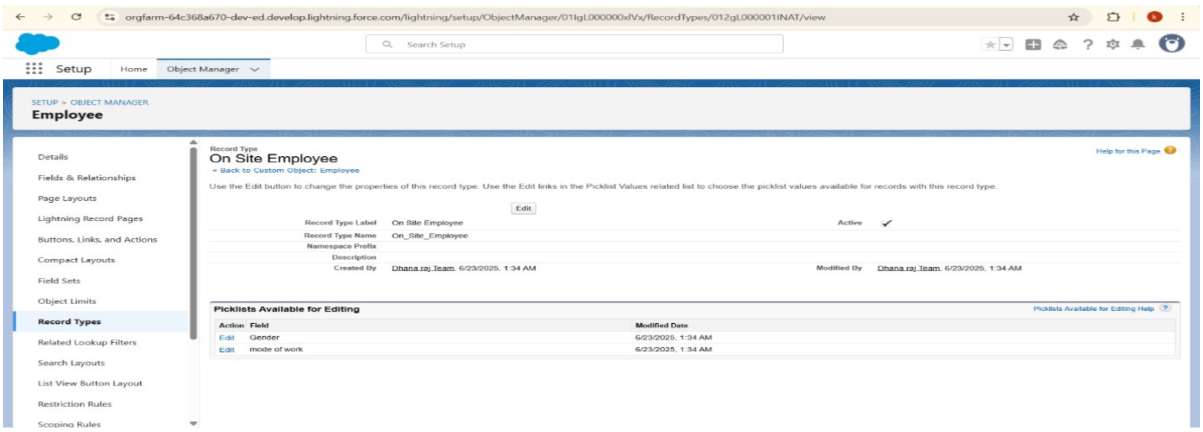


orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000xlVx/RecordTypes/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Employee
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
New Record Type
Employee
Help for this Page
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
-- Select Page Layout --
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



orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000xlVx/RecordTypes/new
Search Setup
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
List View Button Layout
Restriction Rules
Scoping Rules
Einstein 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
Manger 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

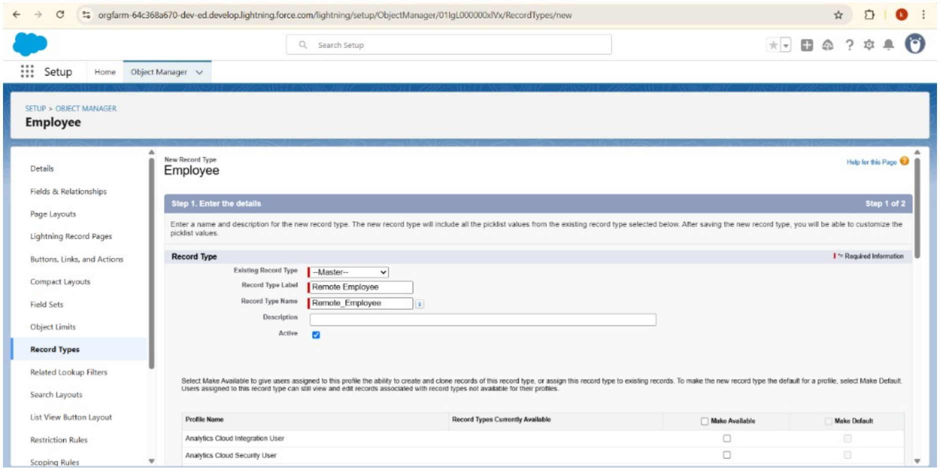


orgfarm-64c368a670-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL000000xlVx/RecordTypes/012gL000001INAT/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Employee
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Record Type
On Site Employee
« Back to Custom Object: Employee
Help for this Page
Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.
Edit
Record Type Label On Site Employee
Active
Record Type Name On_Site_Employee
Namespace Prefix
Description
Created By Dhana raj Team, 6/23/2025, 1:34 AM
Modified By Dhana raj Team, 6/23/2025, 1:34 AM
Picklists Available for Editing
Picklists Available for Editing Help
Action Field Modified Date
Edit Gender 6/23/2025, 1:34 AM
Edit mode of work 6/23/2025, 1:34 AM

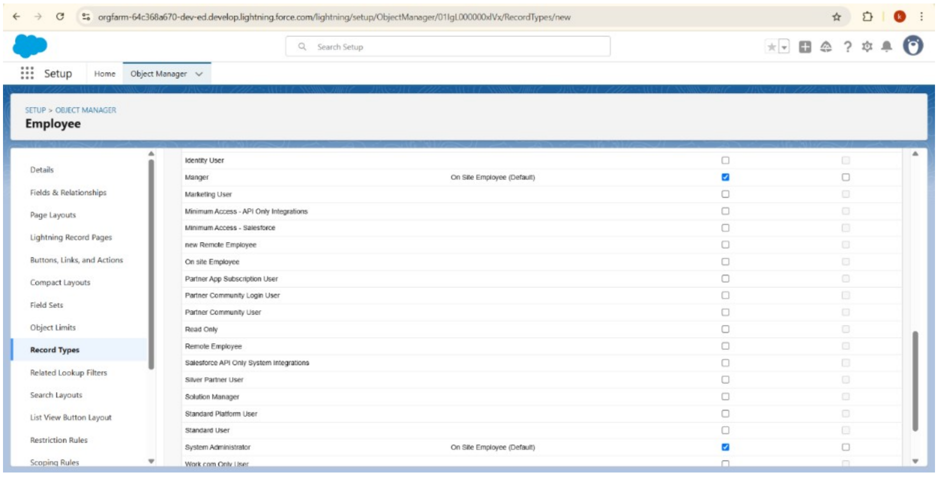
Creating Remote Employee Record Type

To create a Record Type

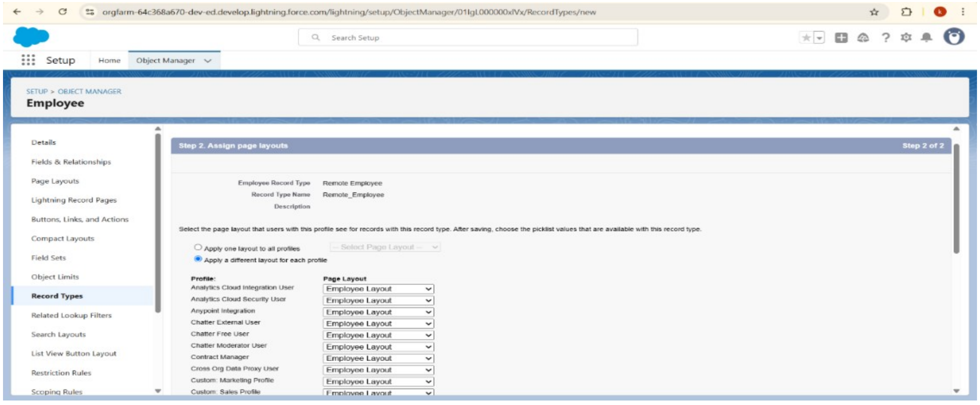
Go to setup and Click on Object Manager and Search for Object Employee then click on edit from drop down ,From the panel click Record Types then Select New and Give Record Type Label as “Remote Employee” and make it active.

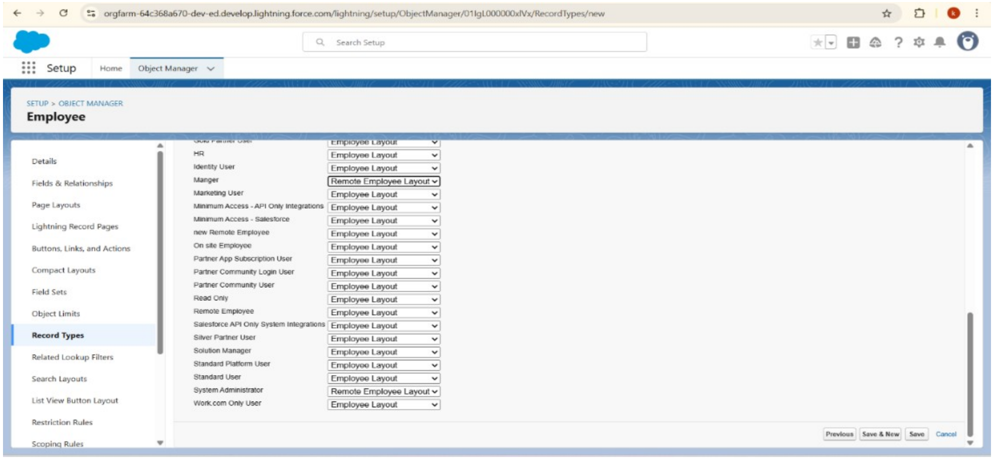


Scroll down and check for the Manager & System Administrator profile and click on Next.



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

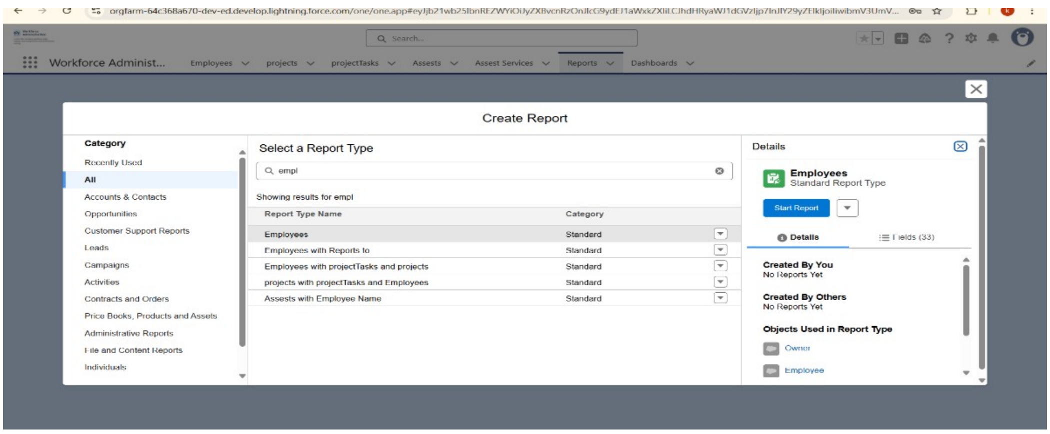




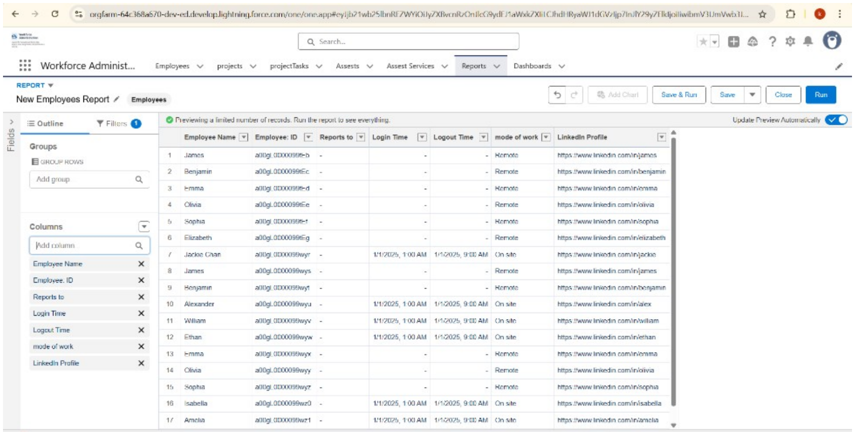
Click on Save

6.15 Permission Sets

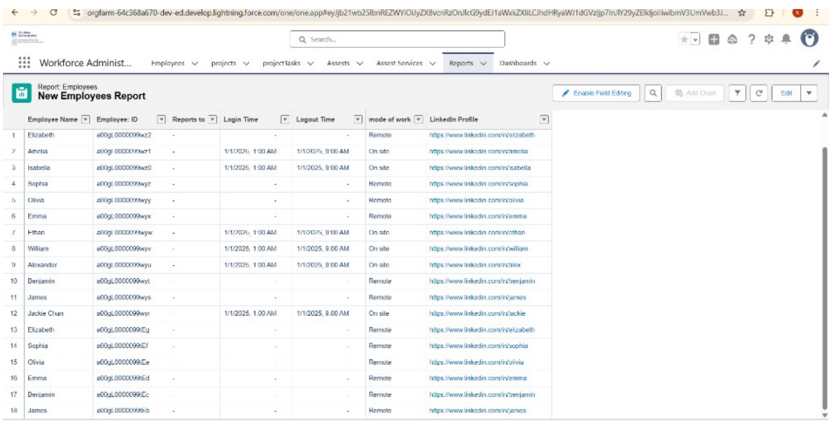
To create a report with Report Type Employee
Go to the app , click on the reports tab and Click New Report Select report type from category or from report type panel or from search panel --> click on start report.



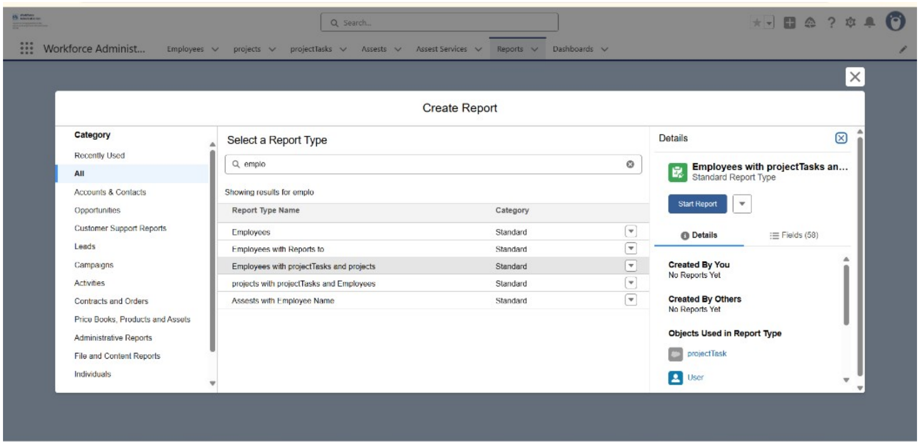
Add fields from left pane



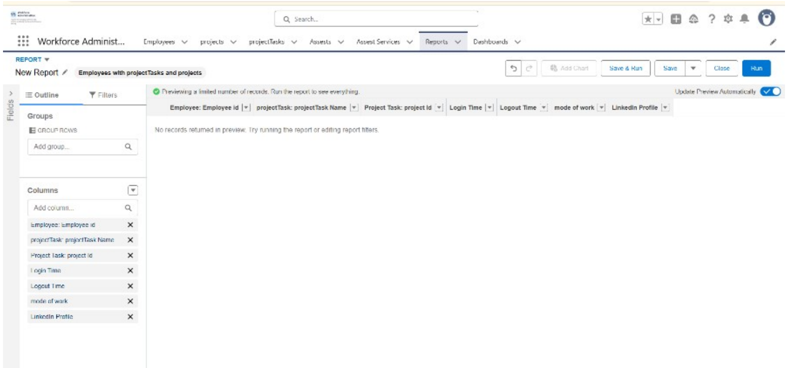
Save or run it



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.

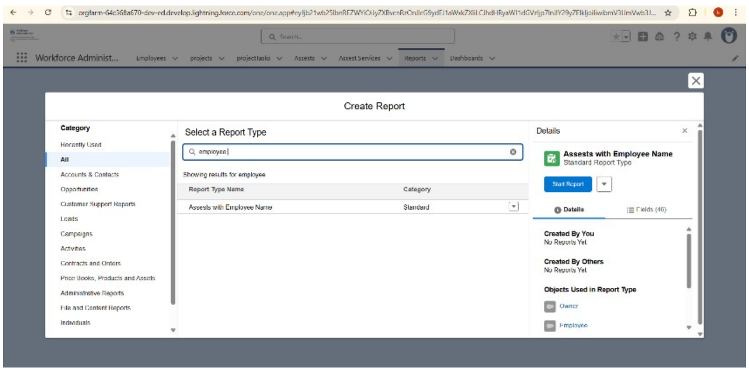


Add fields from left pane.

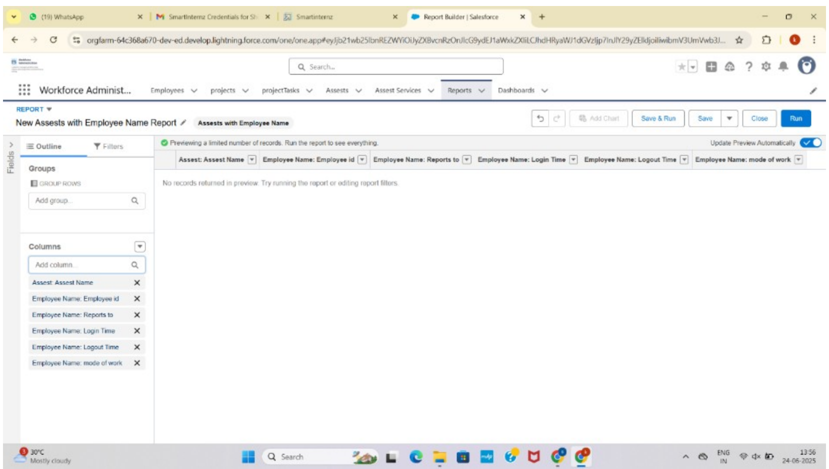


Save or run it.

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.

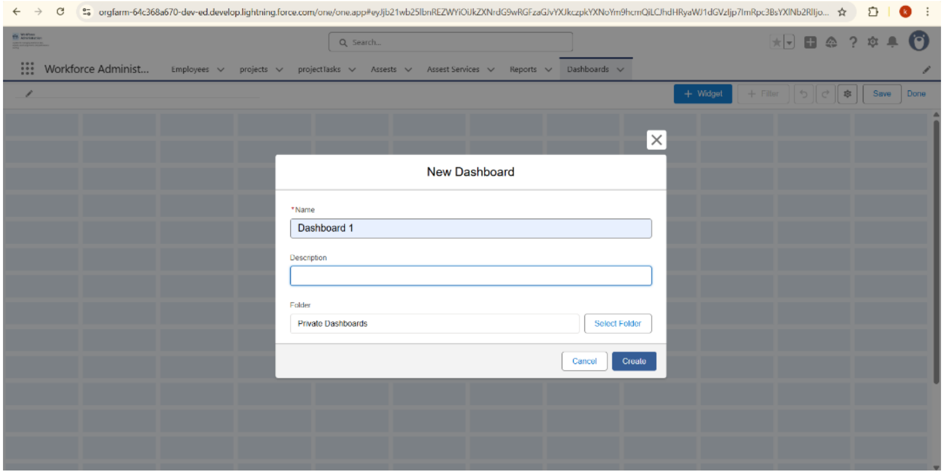


Save or Run it

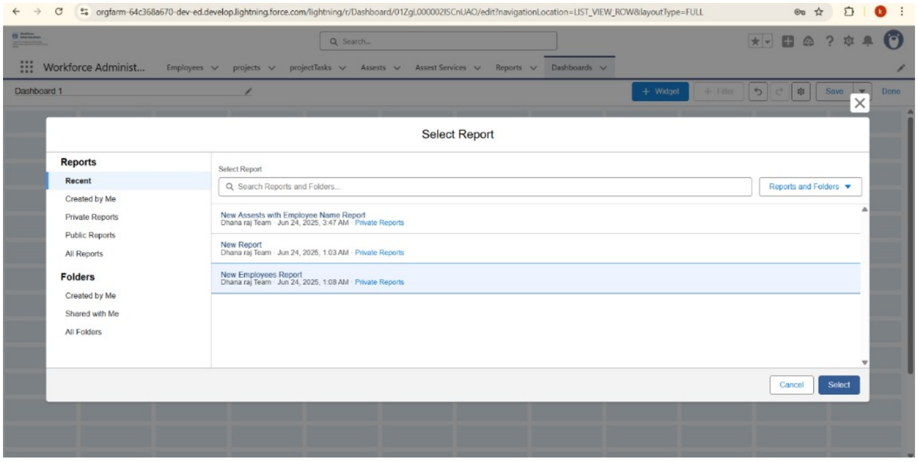
6.16 Dashboards

Create a Dashboard.

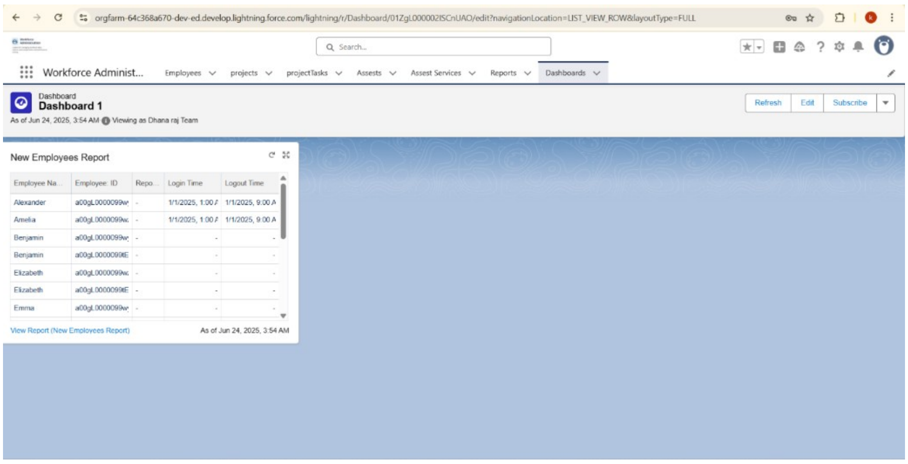
click on the Dashboards tabs and click on New Dashboard. Give a Name and click on Create.



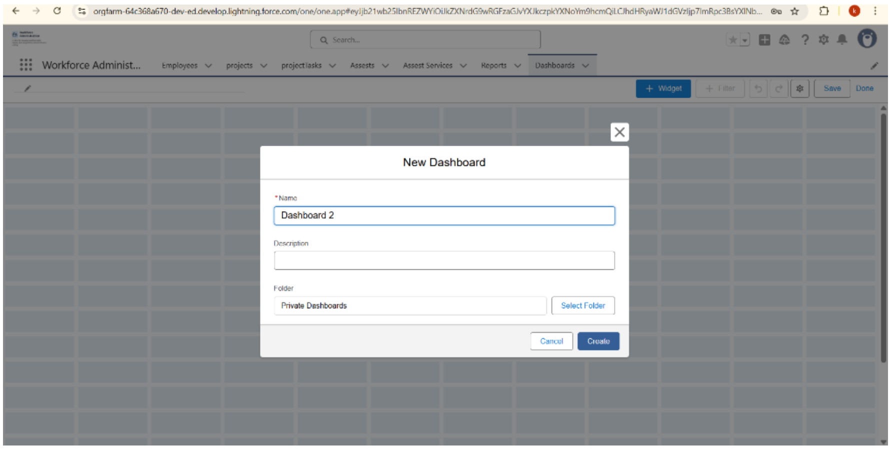
Select add Widget and Select a Report and click on select.



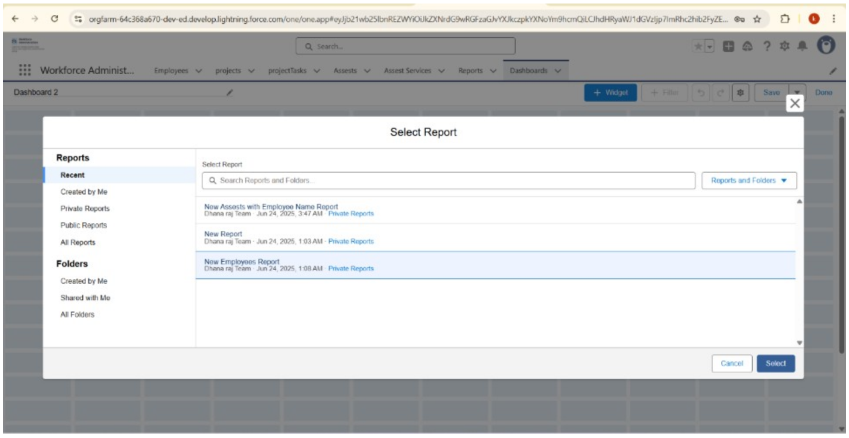
Click Add then click on Save and then click on Done.



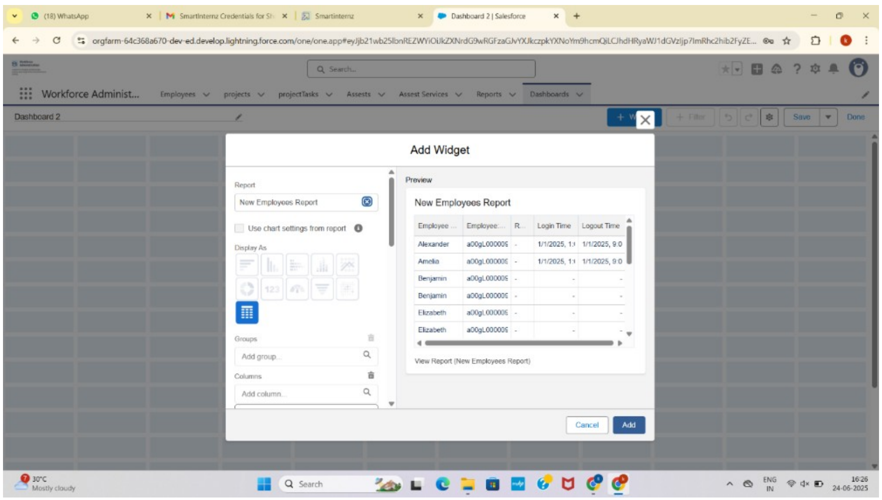
Create another Dashboard
click on the Dashboards tabs and click on New Dashboard. Give a Name and click on Create.



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



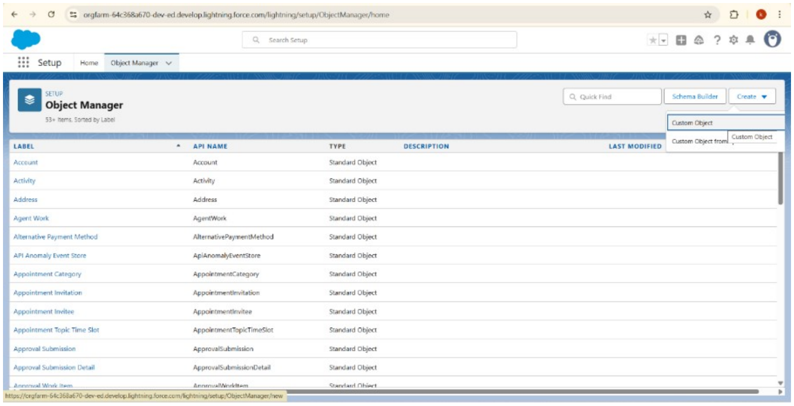
Click Add then click on Save and then click on Done.



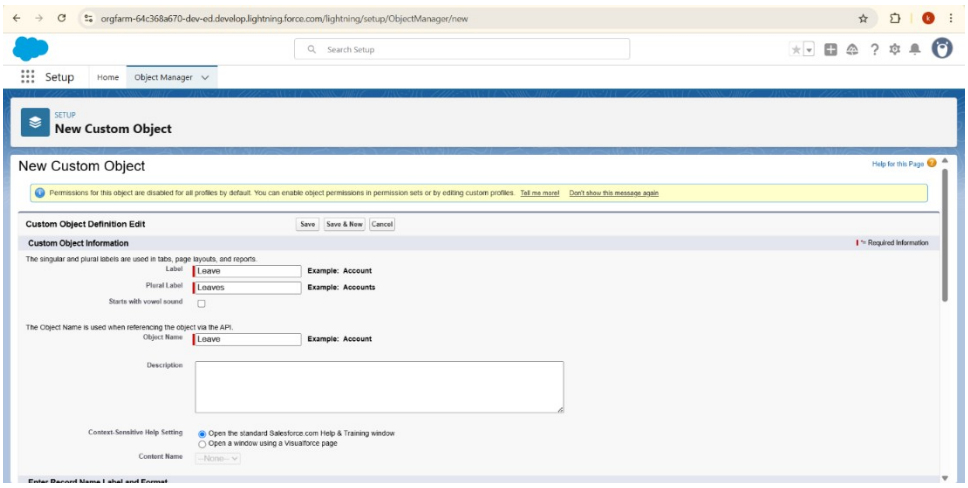
Approval Process

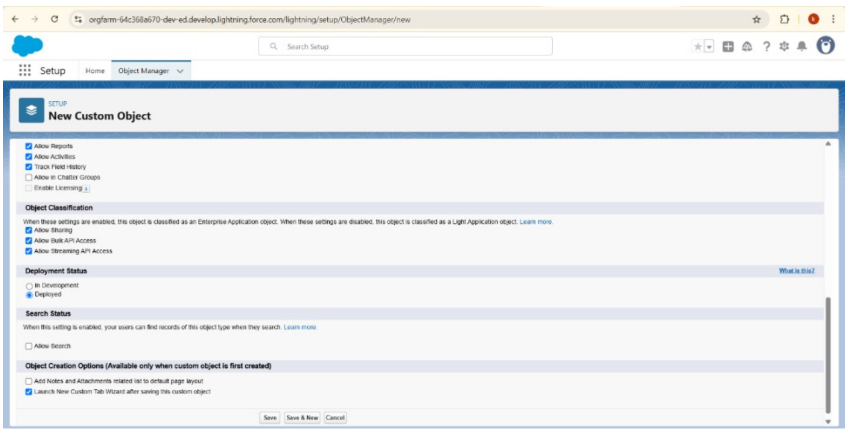
Create a leave Object.

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



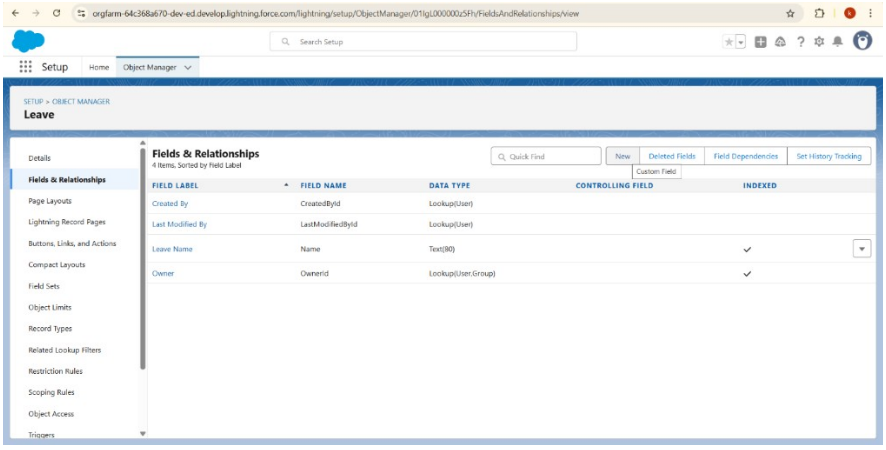
Give the label name as leave.



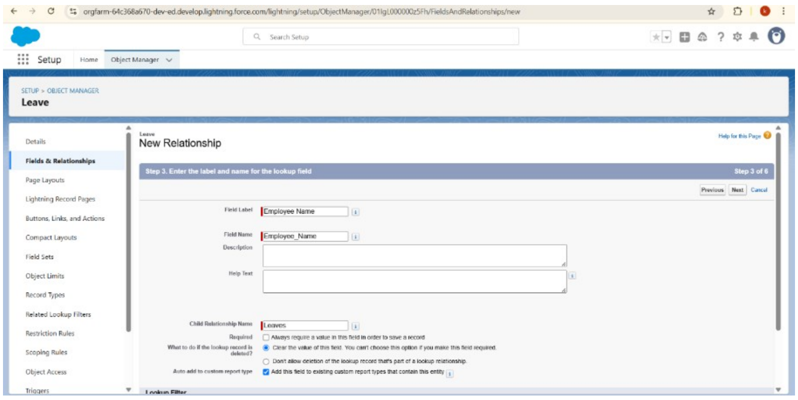


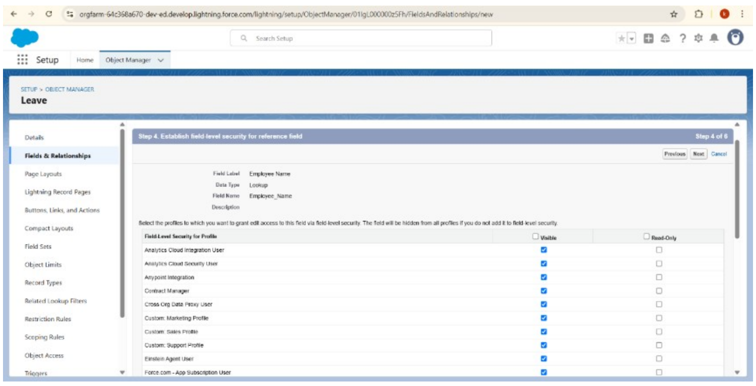
Click on save.

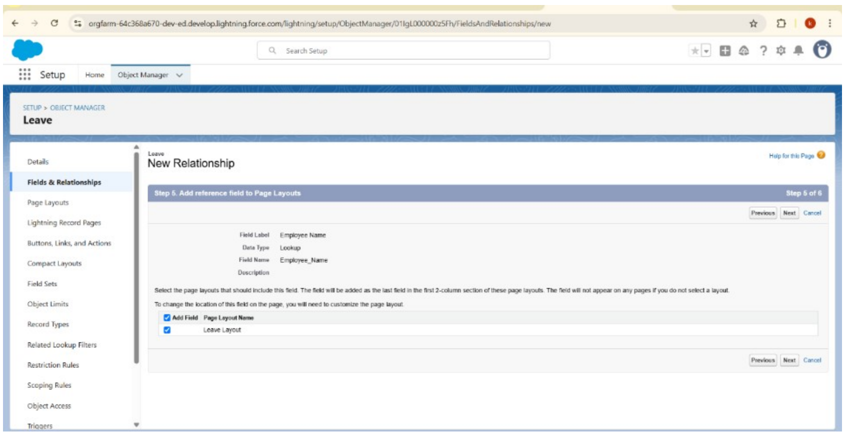
Create a field in leave object and click on new.

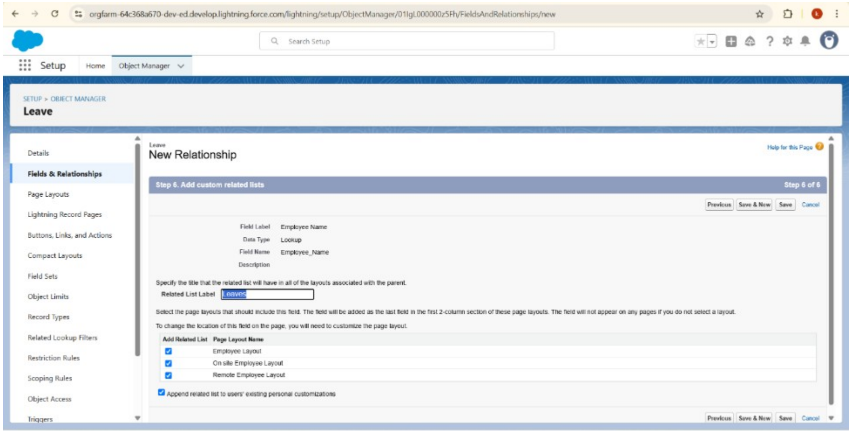


Choose the field type as lookup relationship and object is employee and then field label

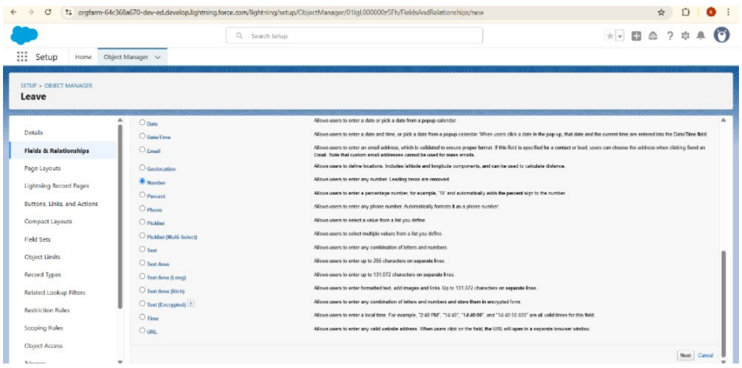


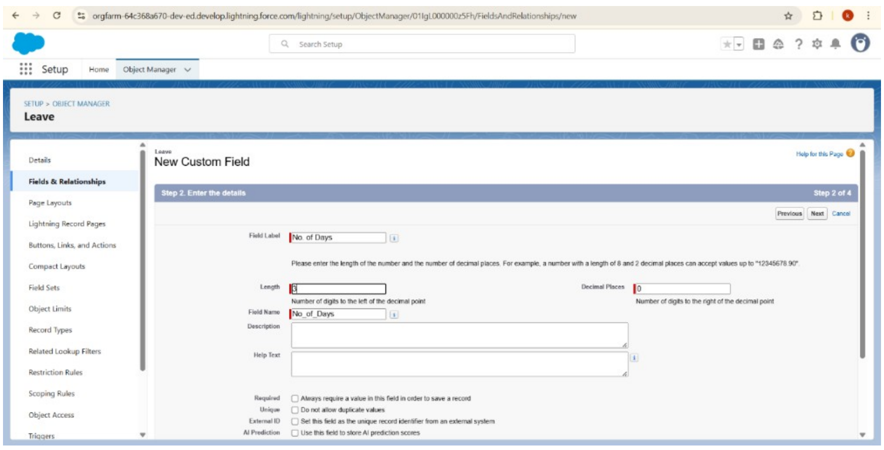


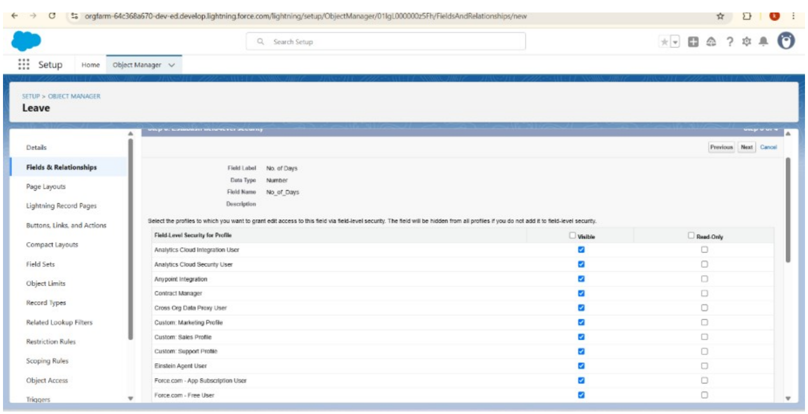


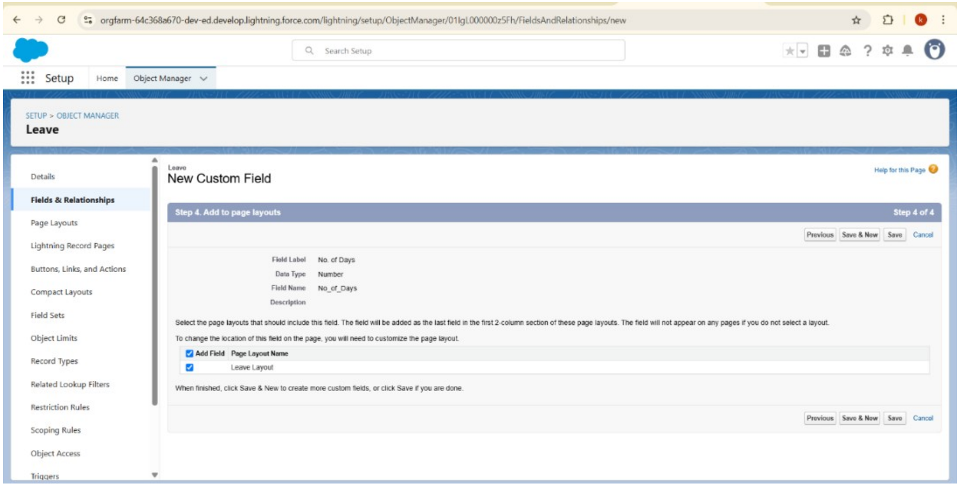


Click on save.
Choose the field type as Number and field is No. of Days next step as

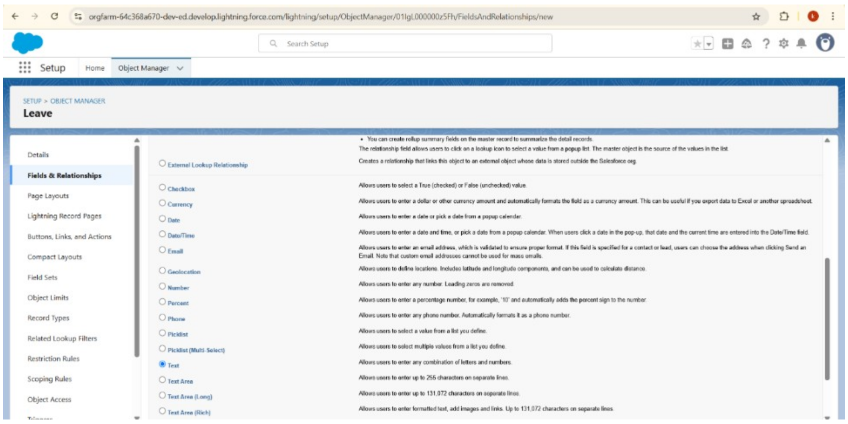


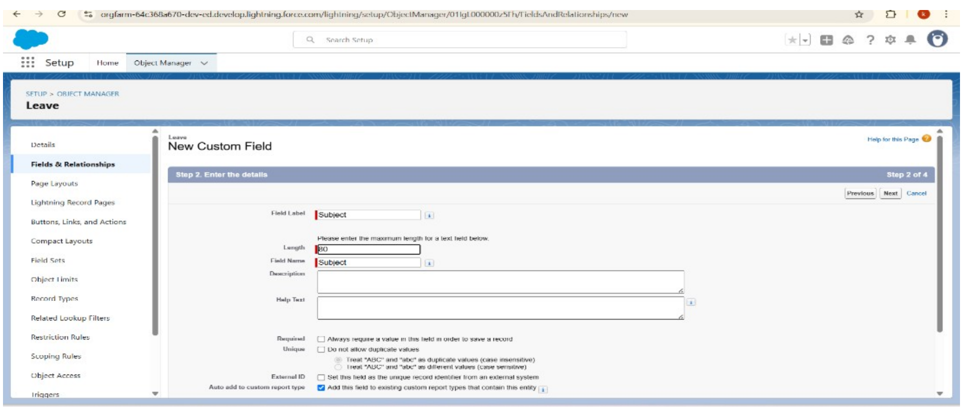


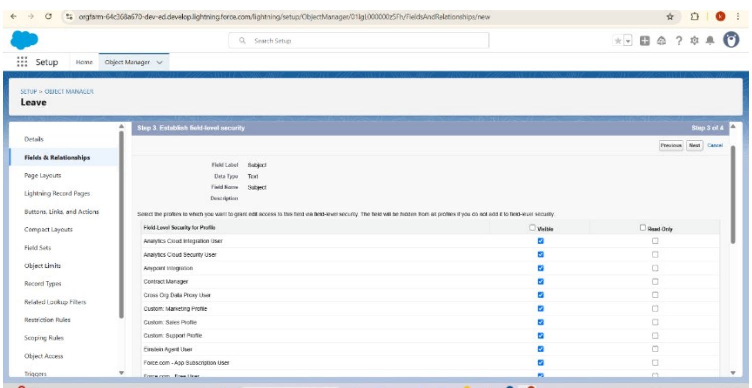


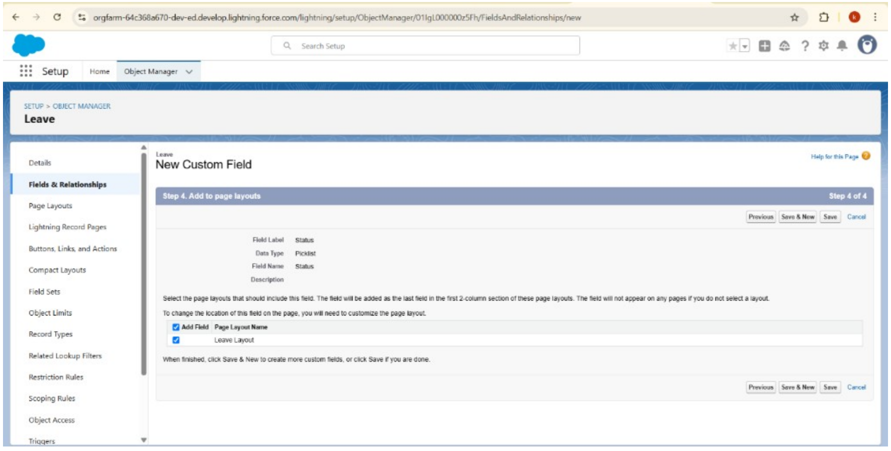


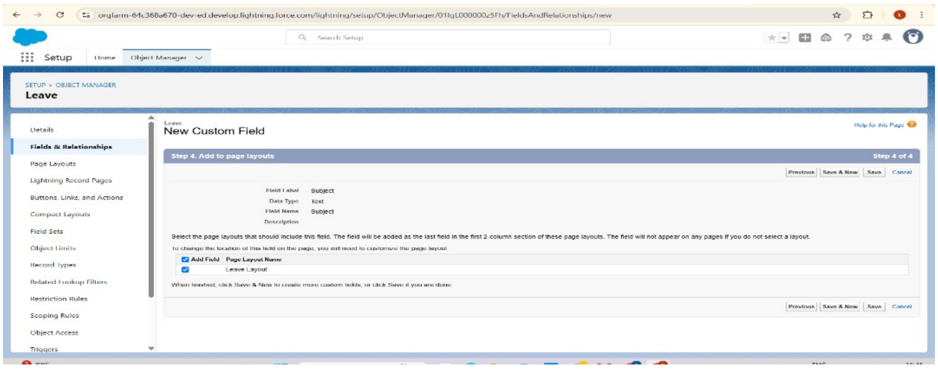
Choose the field type as text and field is Subject next step as



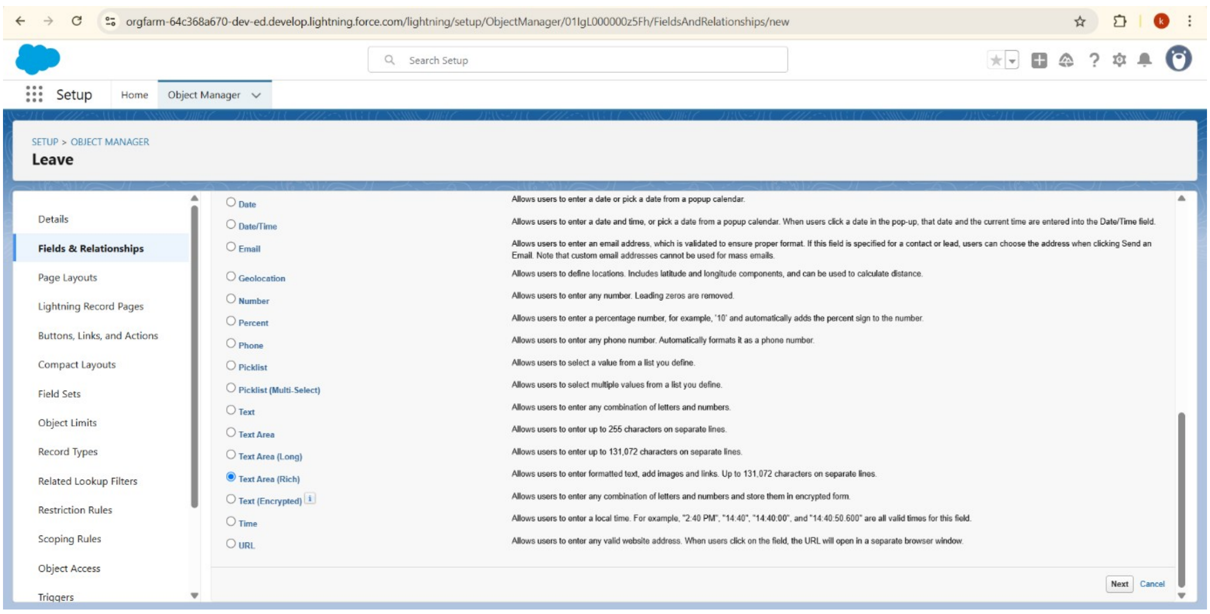


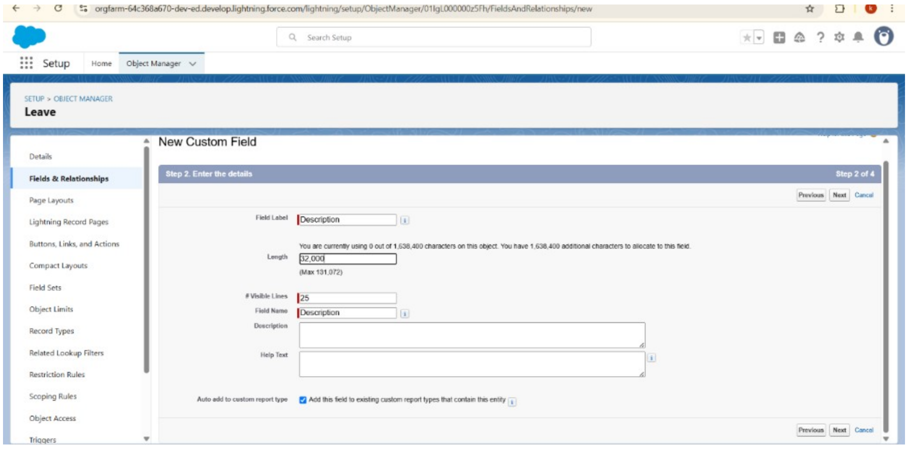


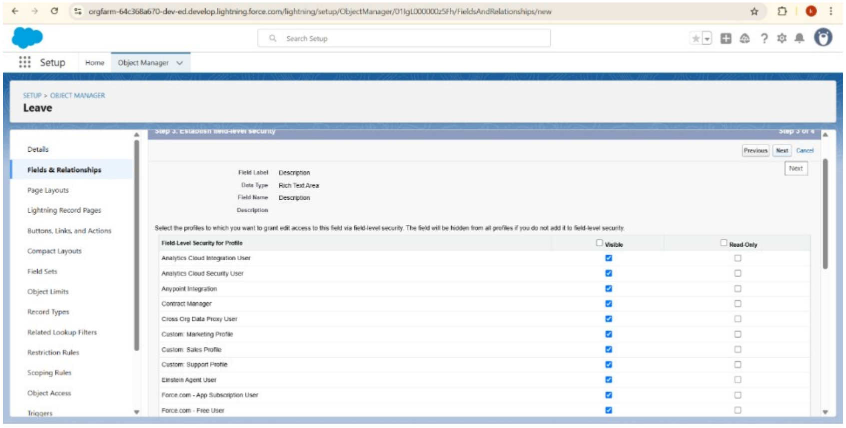




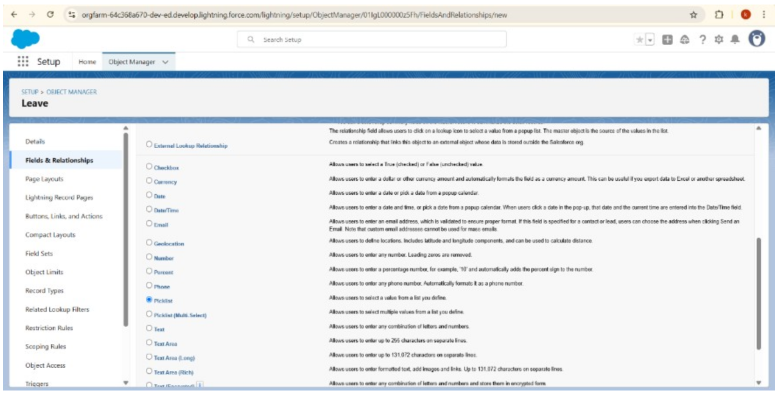
Choose the field type as Text Area (Rich) and field is Description next step as

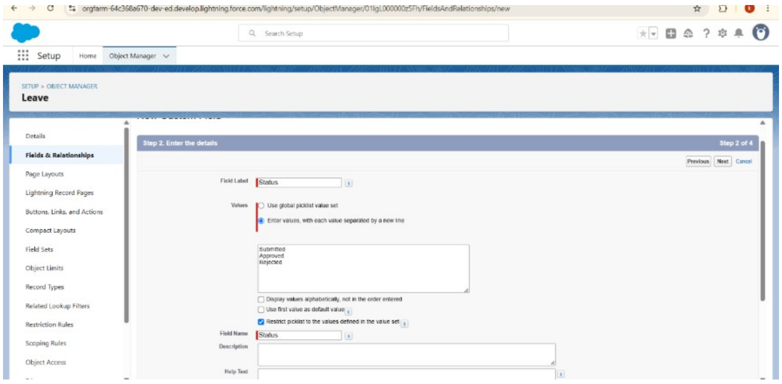


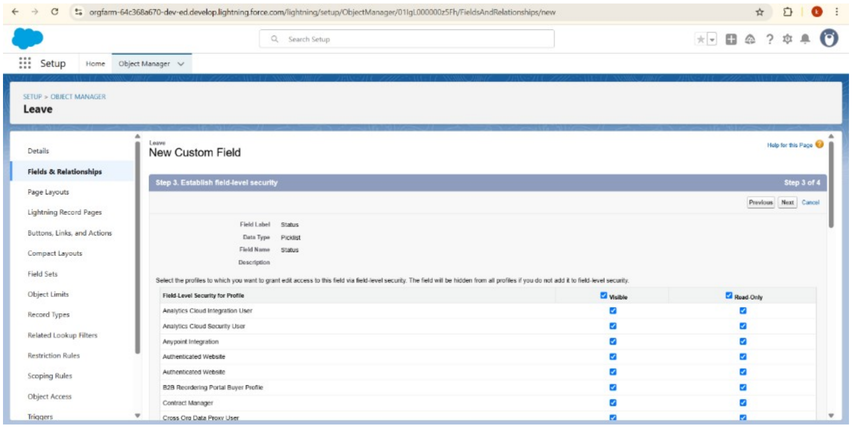


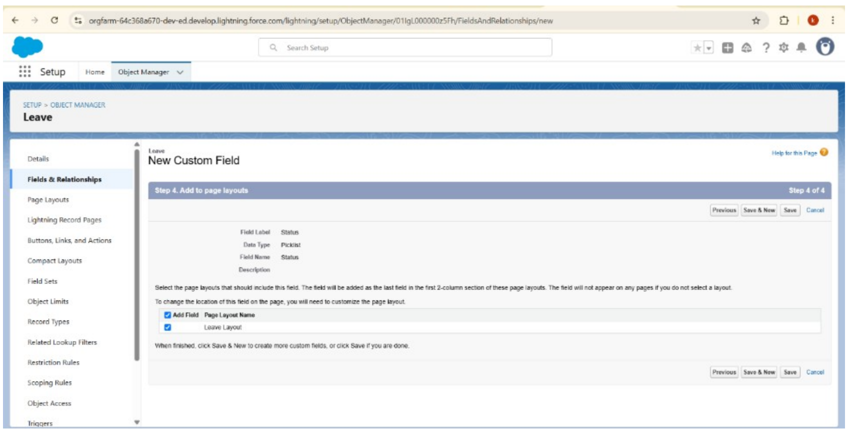


Choose the field type as Picklist and field is Status next step as



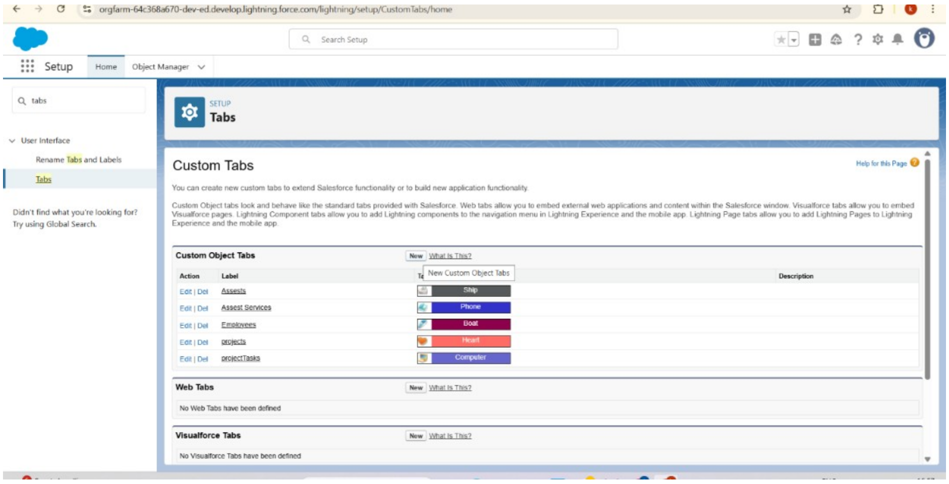


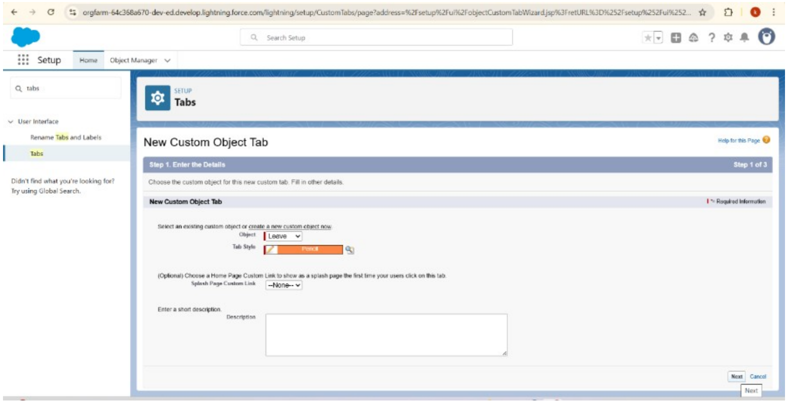


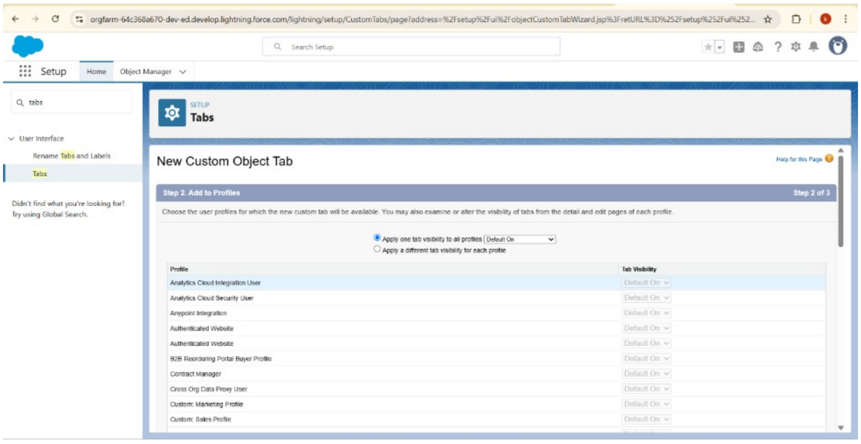


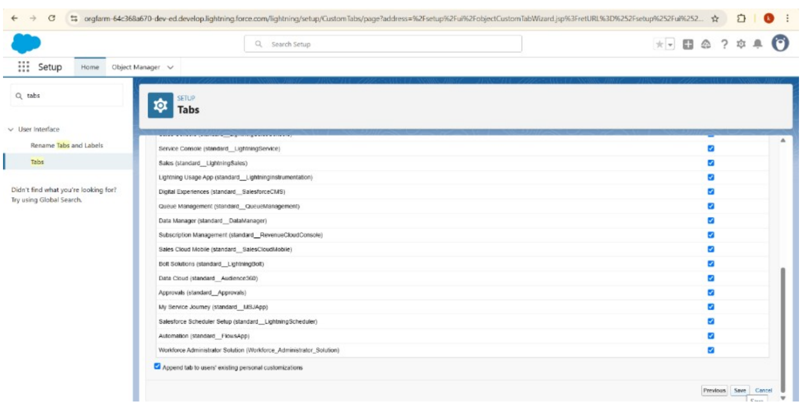
Create an Approval Process for Leave object.

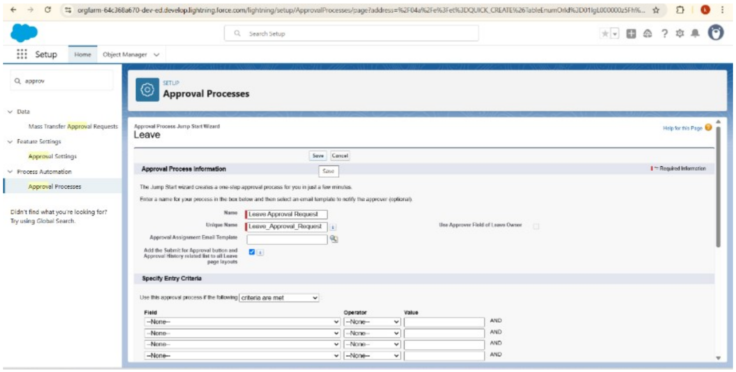
In the Manage Approval Processes For list, select Leave. Click Create New Approval Process and select Use Jump Start Wizard.

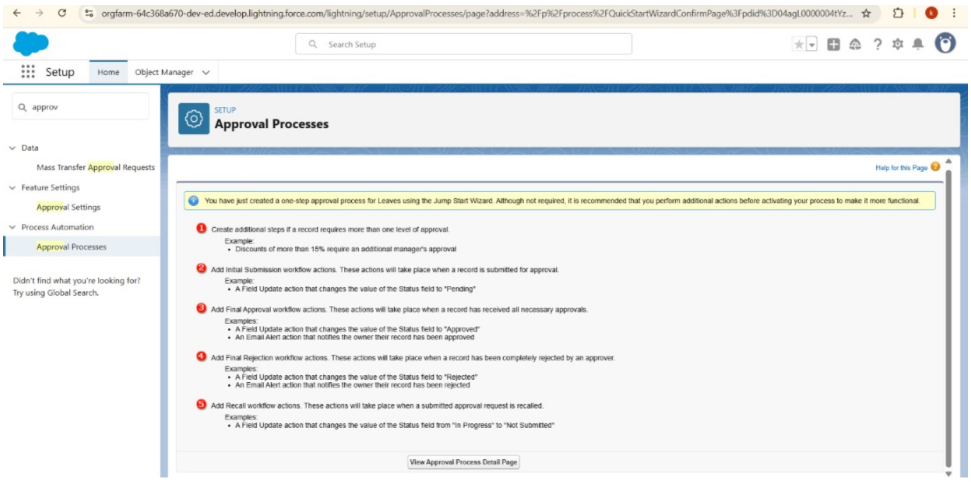

Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object Tabs
New
What Is This?
New Custom Object Tabs
Action
Label
Description
Edit | Del
Assests
Ship
Assest Services
Phone
Employees
Boat
projects
Heart
projectTasks
Computer
Web Tabs
No Web Tabs have been defined
Visualforce Tabs
No Visualforce Tabs have been defined


Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
New Custom Object Tab
Required Information
Select an existing custom object or create a new custom object now.
Object
Leave
Tab Style
Pencil
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel


Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 2. Add to Profiles
Step 2 of 3
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.
Apply one tab visibility to all profiles
Default On
Apply a different tab visibility for each profile
Profile
Tab Visibility
Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile

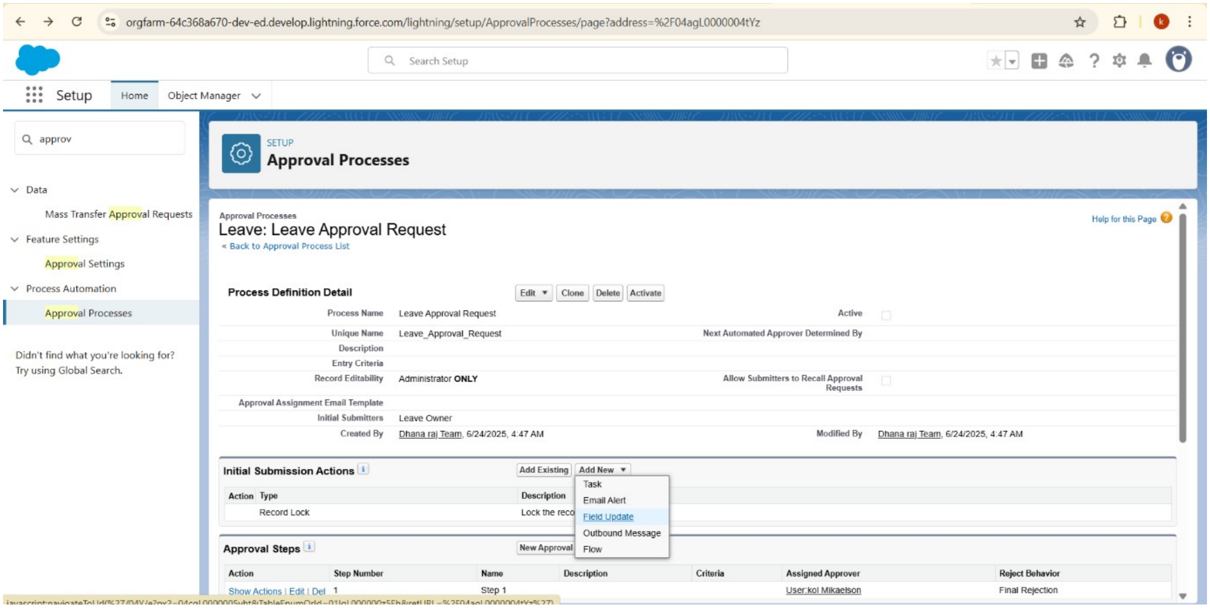

Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Service Console (standard__LightningService)
Sales (standard__LightningSales)
Lightning Usage App (standard__LightningInstrumentation)
Digital Experiences (standard__SalesforceCMS)
Queue Management (standard__QueueManagement)
Data Manager (standard__DataManager)
Subscription Management (standard__RevenueCloudConsole)
Sales Cloud Mobile (standard__SalesCloudMobile)
Bolt Solutions (standard__LightningBolt)
Data Cloud (standard__Audience360)
Approvals (standard__Approvals)
My Service Journey (standard__MSJApp)
Salesforce Scheduler Setup (standard__LightningScheduler)
Automation (standard__FlowsApp)
Workforce Administrator Solution (Workforce_Administrator_Solution)
Append tab to users' existing personal customizations
Previous
Save
Cancel



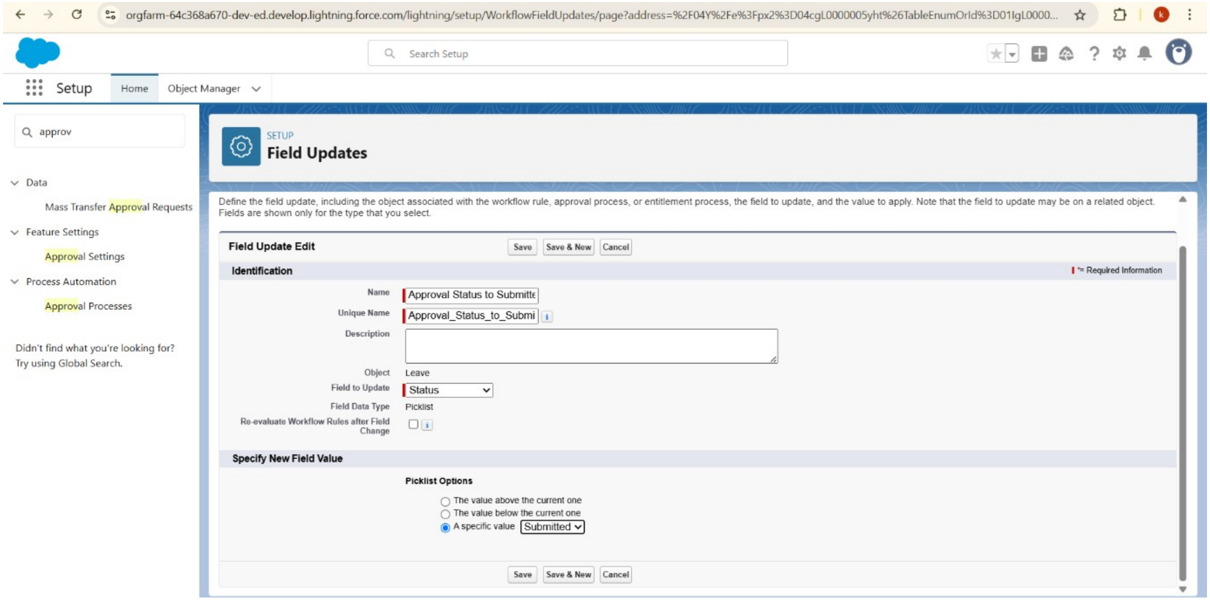


Initial Submission Action.

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

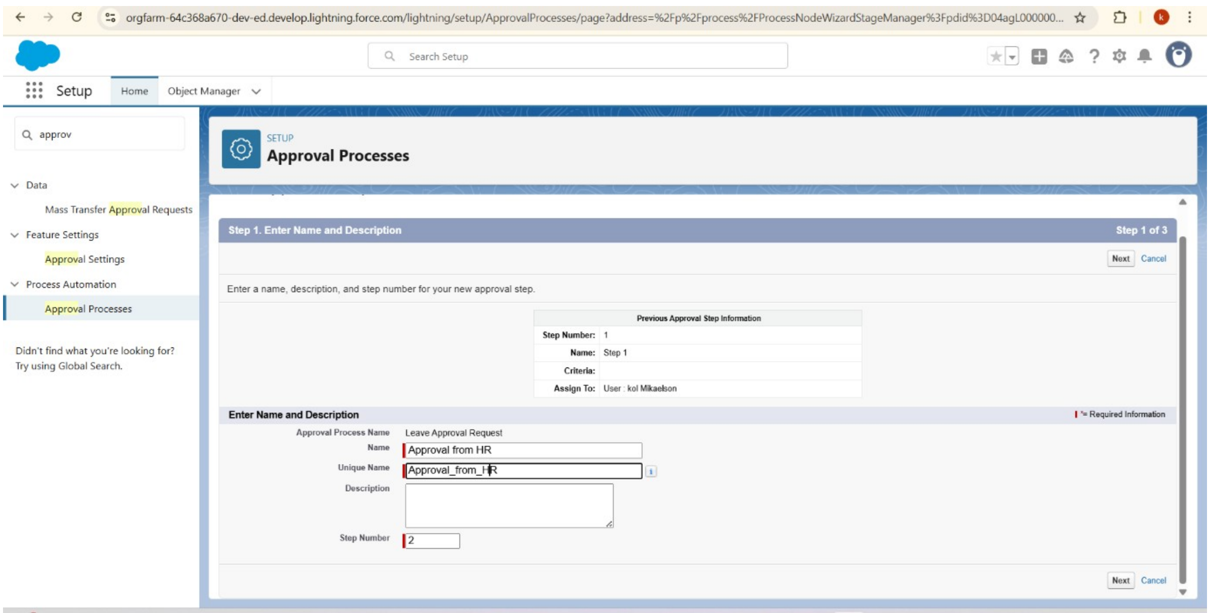


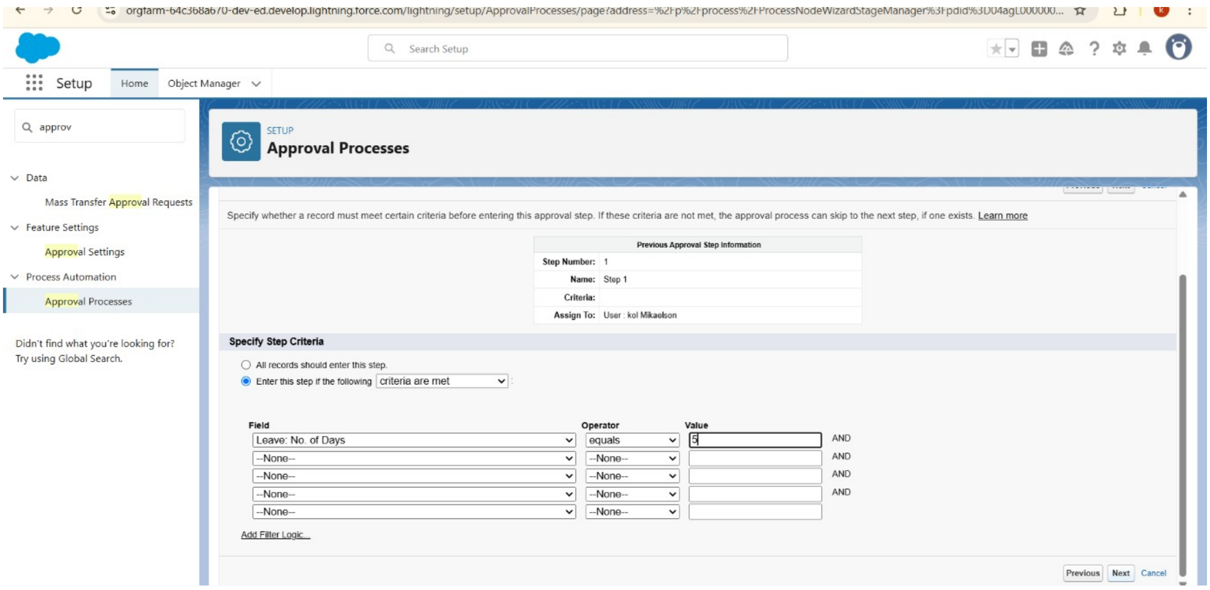
Give field name as Approval status to submit

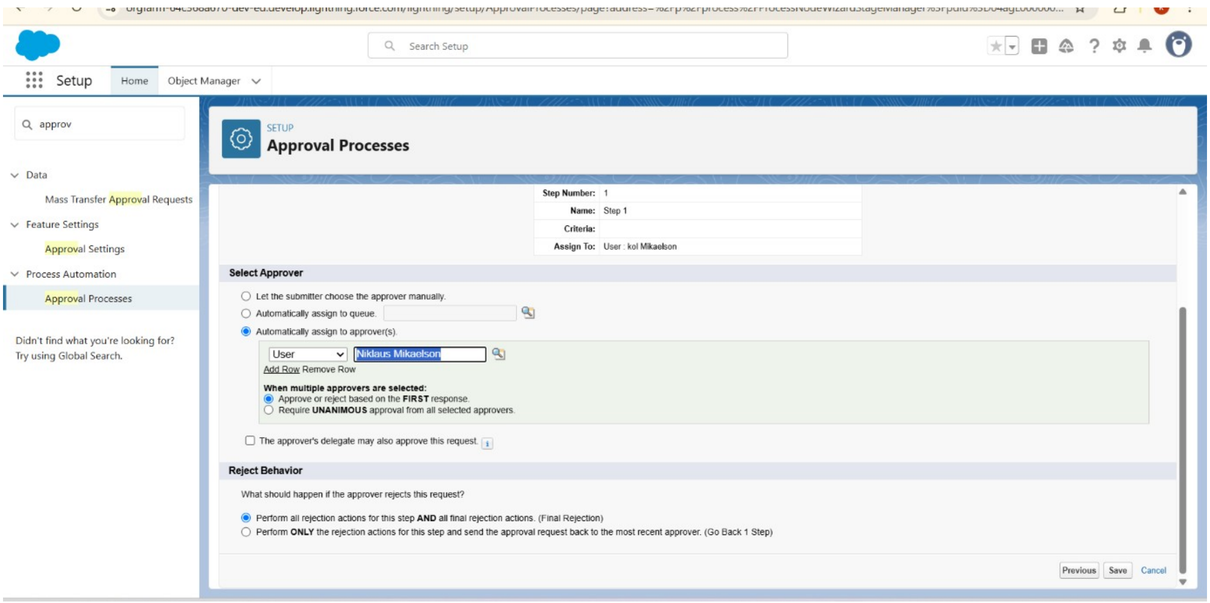


Approval Steps

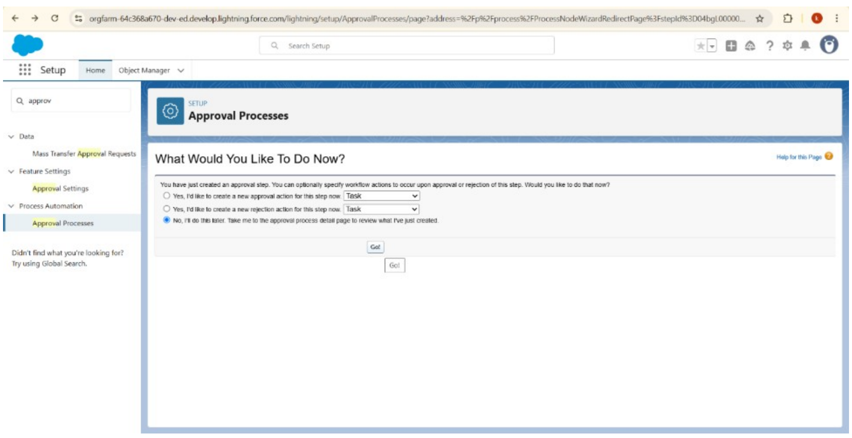
Give the name as “Approval from HR” and click on next.





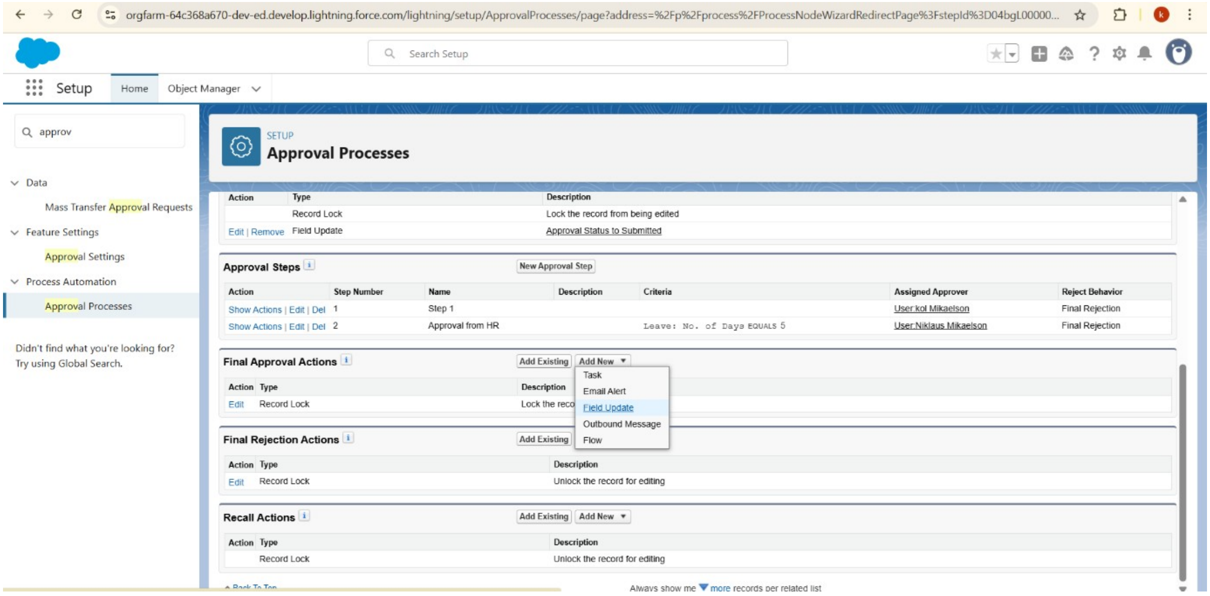


Select No I will do later

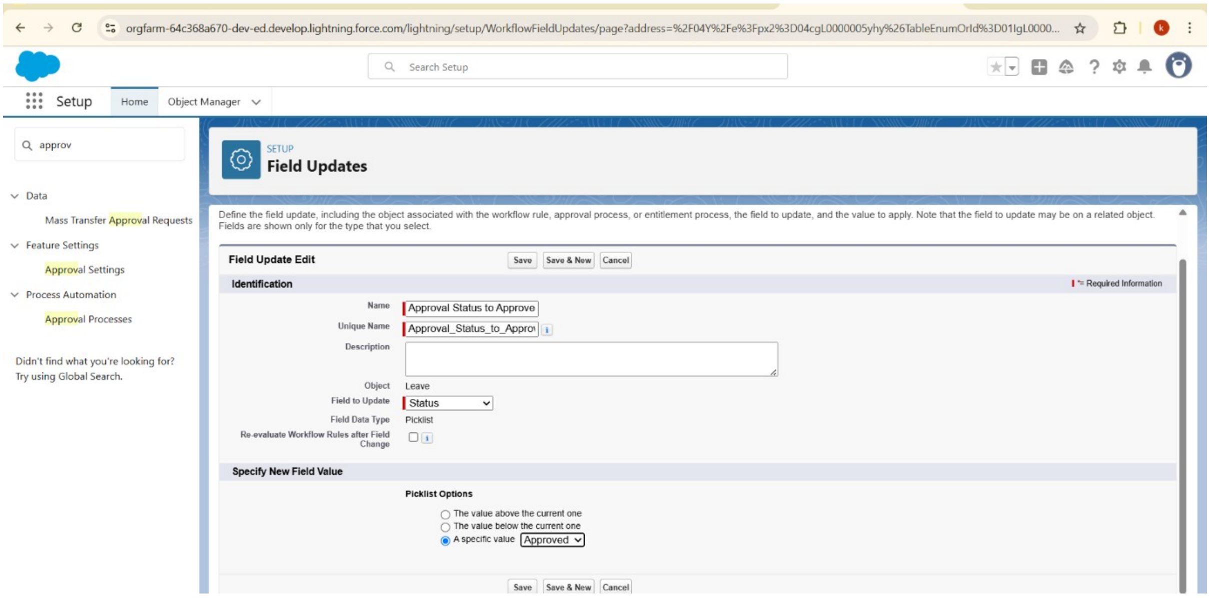


Final Approval Action.

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

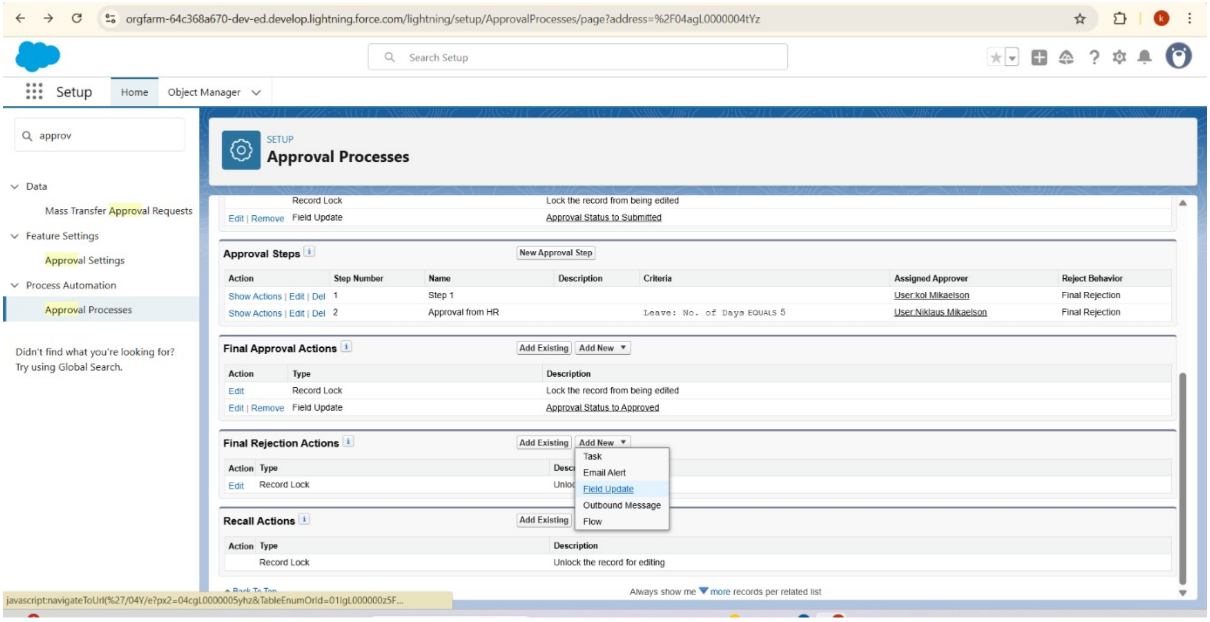


Give name as “Approval Status to Approved”. Under specify new field value select “A specific value” and select Approved and click Save.

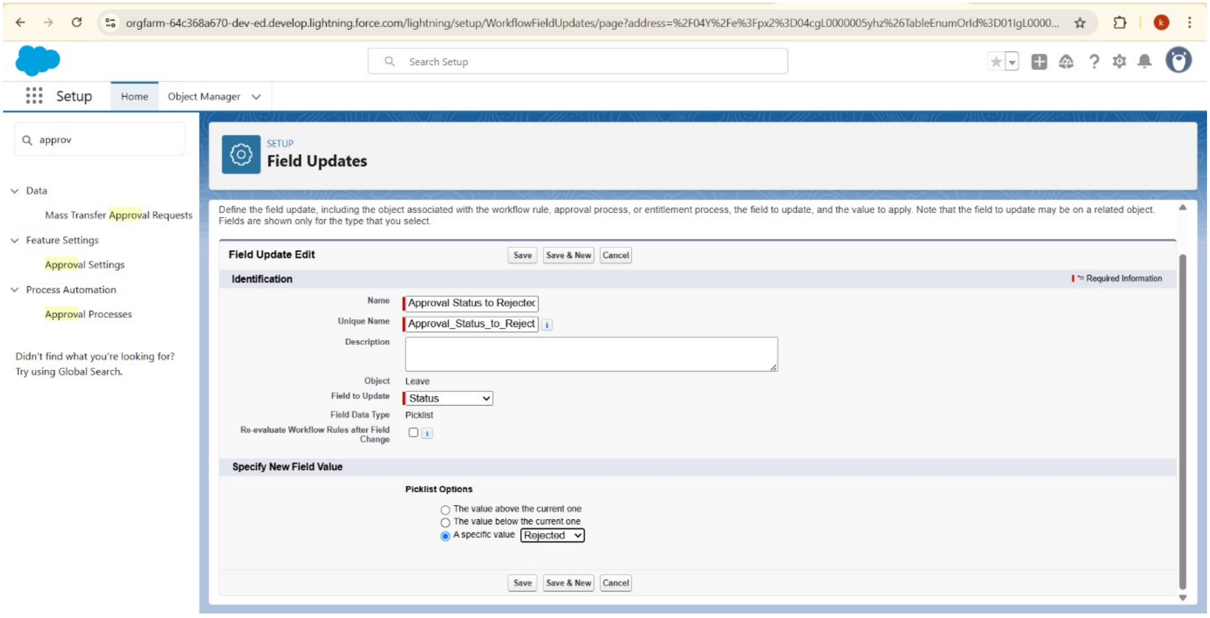


Final Rejection Action.

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



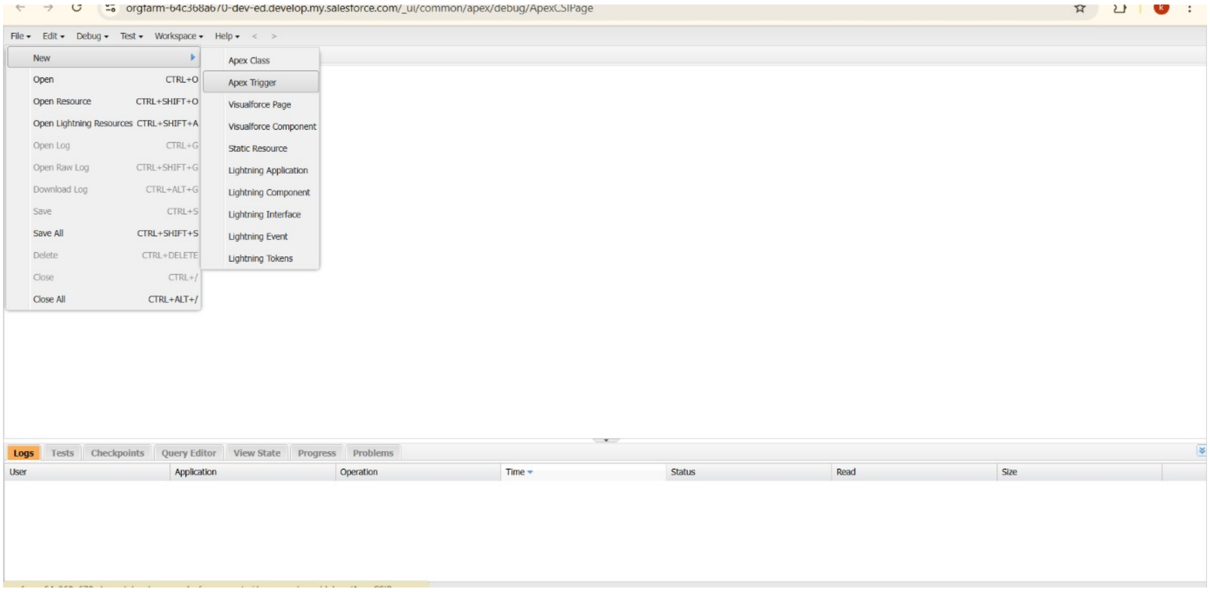
Given name as “Approval Status to Rejected”



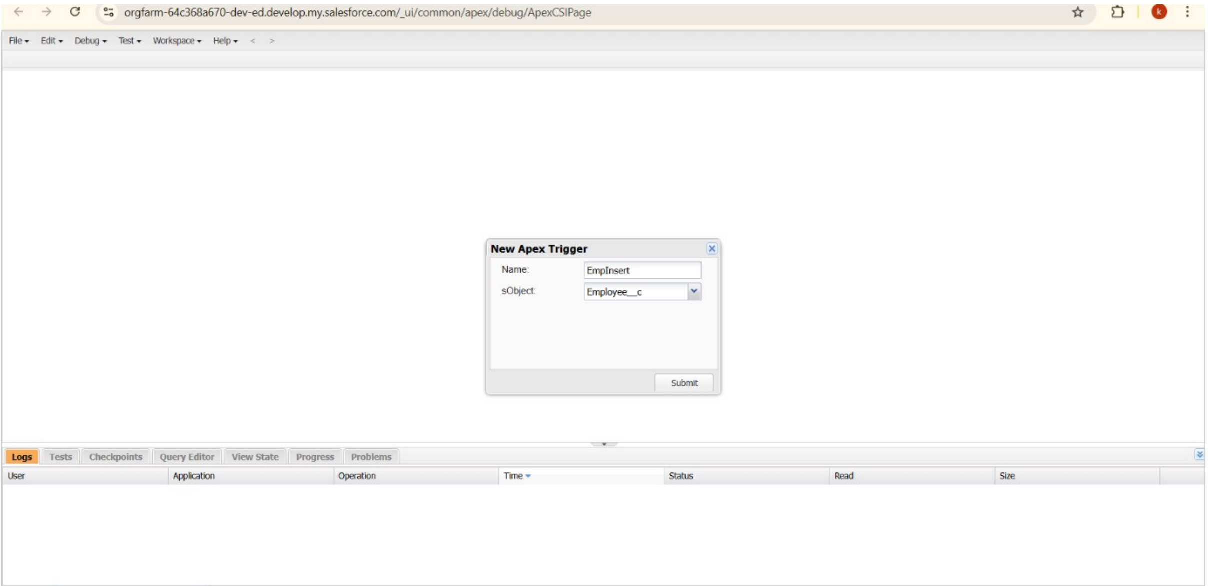
6.18 Apex Trigger

Creating an apex trigger

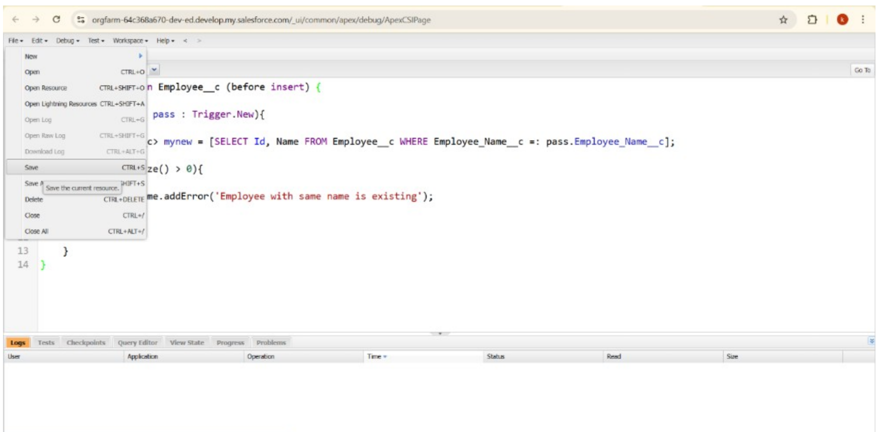
Click on new file and select apex class

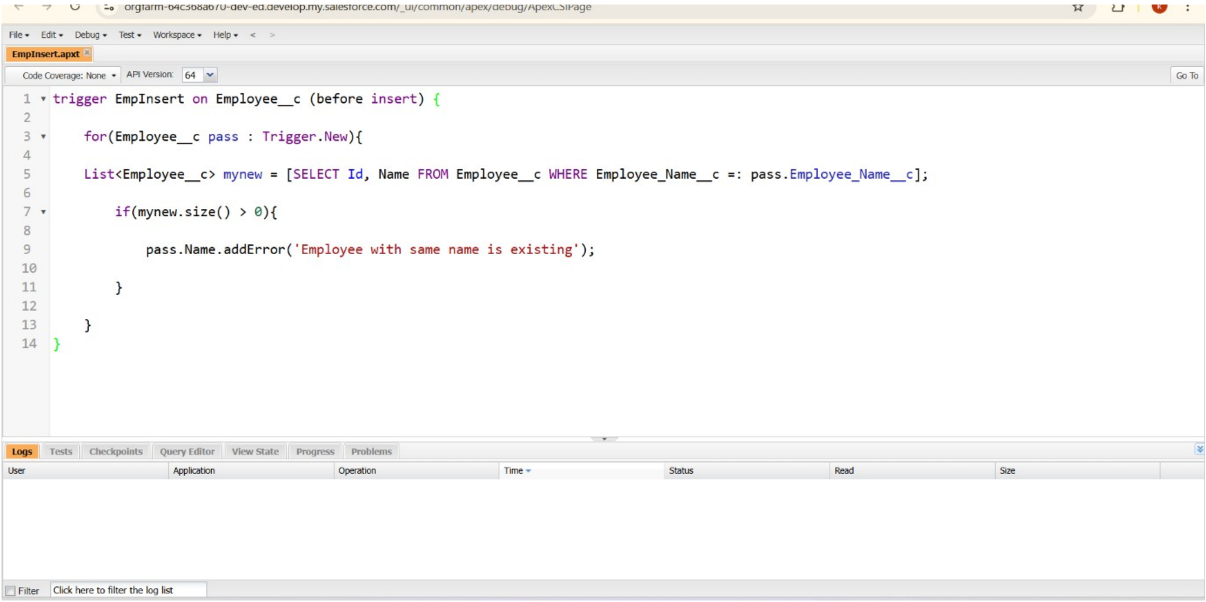


Name is EmpInsert and object is Employee__c.

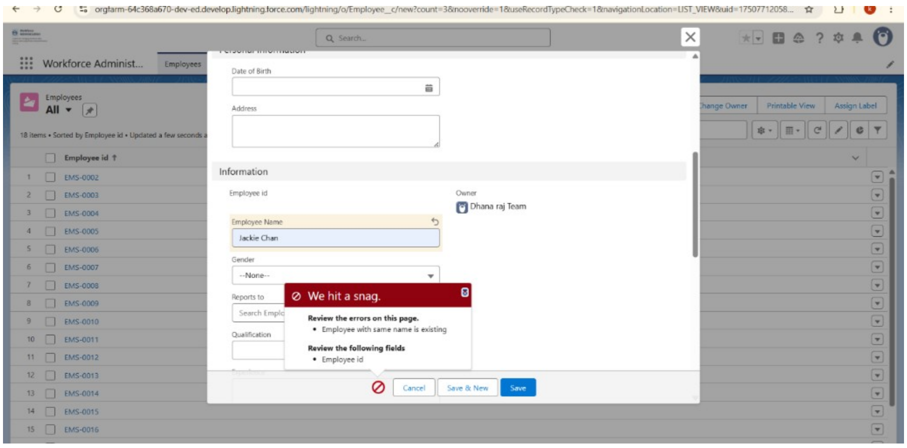


Click on save





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.