

WORKFORCE ADMINISTRATION SOLUTION(DEV)

TEAM MEMBERS:

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COLLEGE NAME:TAMILNADU COLLEGE OF ENGINEERING

COLLEGE CODE : 7142

Project Overview:

The Workforce Administration Solution is designed to address the challenges of employee project management and asset tracking. By leveraging Salesforce's robust platform, the project aims to enhance organizational efficiency through centralized employee data management, project allocation tracking, performance monitoring, and comprehensive asset assignment record-keeping.

Objectives:

Business Goals:

- Streamline employee project management processes
- Improve visibility into workforce utilization
- Enhance asset tracking and allocation efficiency
- Optimize resource management

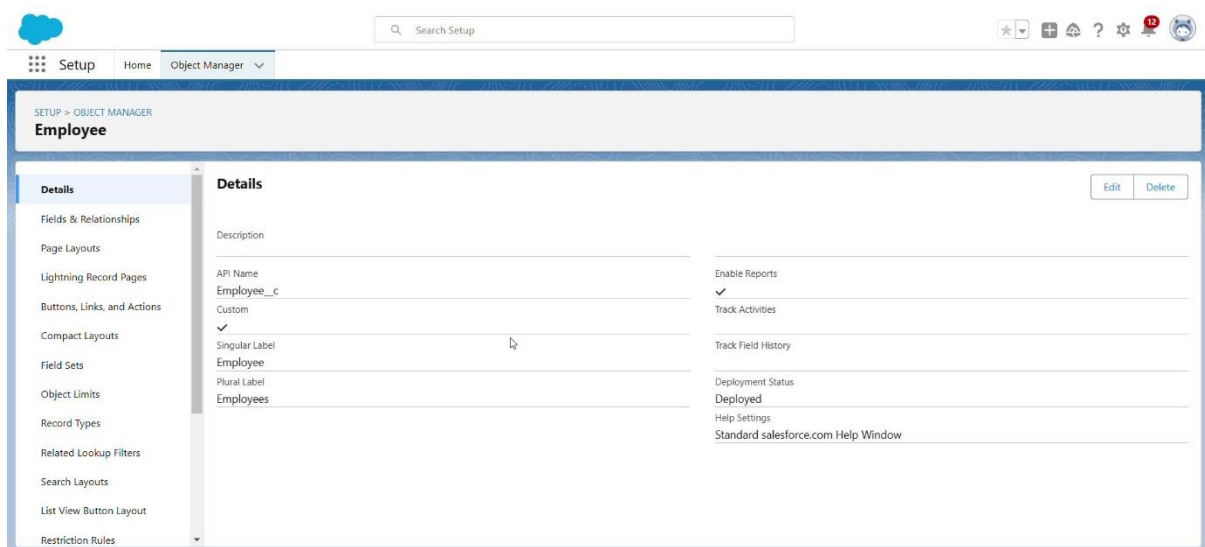
Specific Outcomes:

- Develop a comprehensive Salesforce solution for workforce tracking
- Create dynamic dashboards for project and asset management
- Implement automated reporting for employee performance and project involvement
- Establish a single source of truth for employee and asset information

Salesforce Key Features and Concepts Utilized:

Creating Custom Objects:

Employees Object



The screenshot shows the Salesforce Setup interface for the 'Employee' custom object. The top navigation bar includes the Setup icon, a search bar, and various utility icons. The main content area is titled 'SETUP > OBJECT MANAGER Employee'. On the left, a sidebar lists configuration options: 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, and Restriction Rules. The 'Details' section is active, showing fields for Description, API Name (Employee_c), Custom (checked), Singular Label (Employee), Plural Label (Employees), Enable Reports (checked), Track Activities (checked), Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are visible in the top right of the details section.

ProjectTask object

The screenshot shows the Salesforce Setup interface for the **ProjectTask** object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, and Object Access. The main content area is titled **ProjectTask** and includes a search bar. The **Details** section is active, showing the following information:

- 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

Buttons for **Edit** and **Delete** are located in the top right corner of the details section.

Custom Object Tabs

The screenshot shows the Salesforce Setup interface for **Custom Object Tabs**. The left sidebar contains a navigation menu with options: User Interface, Rename Tabs and Labels, and Tabs. The main content area is titled **Custom Object Tabs** and includes a search bar. The **Custom Object Tabs** section is active, showing a table of tabs:

Action	Label	Tab Style	Description
Edit Del	Assets	Computer	
Edit Del	Asset Services	Helicopter	
Edit Del	Employees	Motorcycle	
Edit Del	Projects	Gears	
Edit Del	ProjectTasks	Phone	

Below the table, there are sections for **Web Tabs**, **Visualforce Tabs**, and **Lightning Component Tabs**, each with a **New** button and a **What Is This?** link. The **Web Tabs** section indicates that no web tabs have been defined. The **Visualforce Tabs** section indicates that no visualforce tabs have been defined. The **Lightning Component Tabs** section indicates that no lightning component tabs have been defined.

Lightning App

← Lightning App Builder

⚙ App Settings

📄 Pages ▾

Workforce Administrator Solution

ⓘ Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

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 ⓘ
Workforce Administrator Solution

* Developer Name ⓘ
Workforce_Administrator_Solution


Description ⓘ
using dev we provided workforce administration solution

App Branding

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


Lightning Web Components for enhanced user interface

← Lightning App Builder

⚙ App Settings

📄 Pages ▾

Workforce Administrator Solution

ⓘ Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items 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

Type to filter list...

Accounts

All Sites

Alternative Payment Methods

Analytics

App Launcher

Appointment Categories

Appointment Invitations

Approval Requests

Asset Action Sources

Asset Actions

Selected Items

Employees

Projects

ProjectTasks

Assets

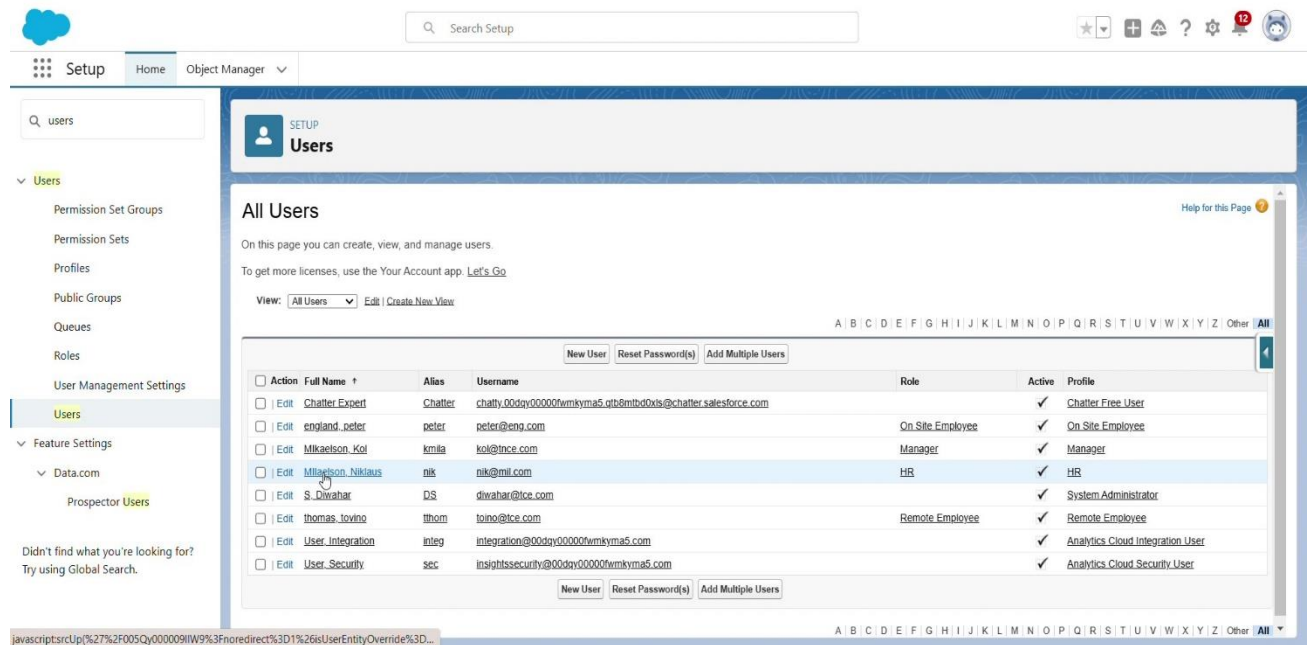
Asset Services

Reports

Dashboards

javascript:void(0);

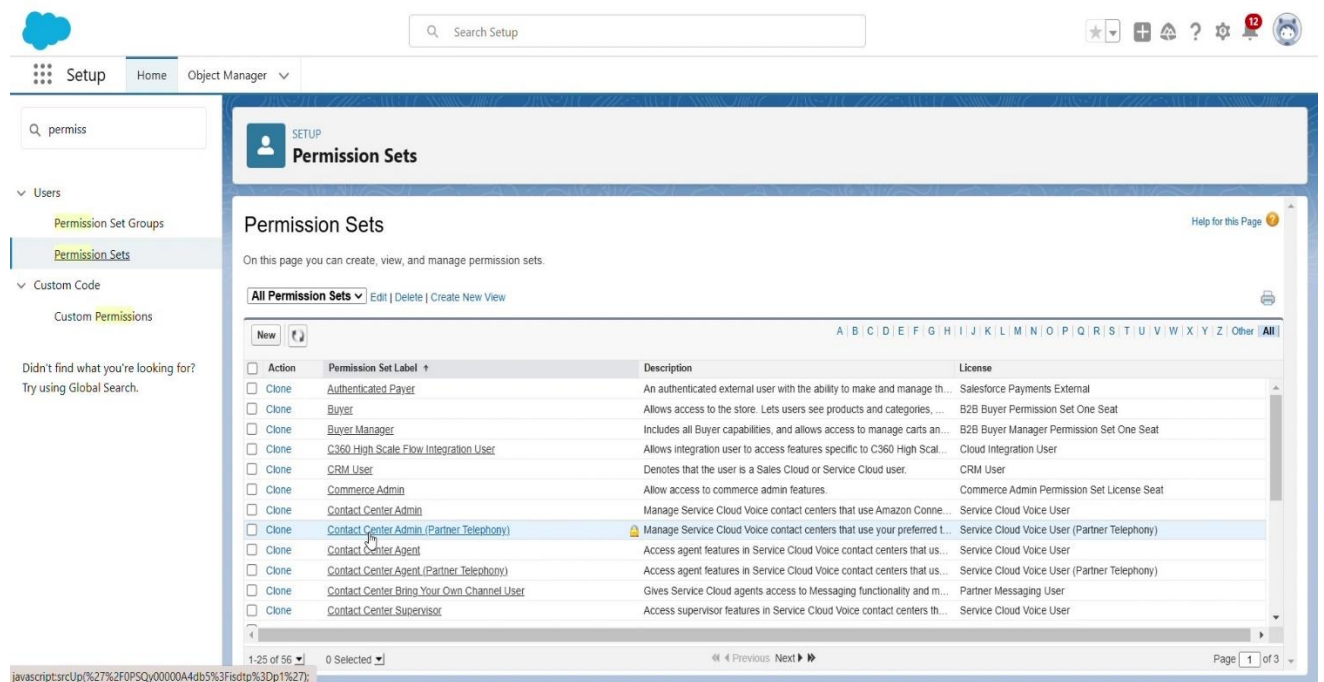
Integration with existing HR systems



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are Chatter Expert, england_peter, Mikaelson_Kol, Mikaelson_Niklaus, S_Diwahar, thomas_tovino, User_Integration, and User_Security. The bottom of the page shows a URL snippet: javascriptsrcUp(%27%2F00S0y000009I0W9%3Fnoirect%3D1%26isUserEntityOverride%3D...

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dy00000fwmkyma5.qtb6mbd0x1s@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	england_peter	peter	peter@eng.com	On Site Employee	✓	On Site Employee
<input type="checkbox"/> Edit	Mikaelson_Kol	kol	kol@tnc.com	Manager	✓	Manager
<input type="checkbox"/> Edit	Mikaelson_Niklaus	nik	nik@mil.com	HR	✓	HR
<input type="checkbox"/> Edit	S_Diwahar	DS	diwahar@tce.com		✓	System Administrator
<input type="checkbox"/> Edit	thomas_tovino	thom	toino@tce.com	Remote Employee	✓	Remote Employee
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dy00000fwmkyma5.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insphttscurity@00dy00000fwmkyma5.com		✓	Analytics Cloud Security User

Permission Sets and Sharing Rules



The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and includes a search bar, a 'View' dropdown set to 'All Permission Sets', and a table of permission sets. The table has columns for Action, Permission Set Label, Description, and License. The permission sets listed are Authenticated Payer, Buyer, Buyer Manager, C360 High Scale Flow Integration User, CRM User, Commerce Admin, Contact Center Admin, Contact Center Admin (Partner Telephony), Contact Center Agent, Contact Center Agent (Partner Telephony), Contact Center Bring Your Own Channel User, and Contact Center Supervisor. The bottom of the page shows a URL snippet: javascriptsrcUp(%27%2F00PS0y00000A4db5%3Fsdtp%3Dp1%27%2F...

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Authenticated Payer	An authenticated external user with the ability to make and manage th...	Salesforce Payments External
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Scal...	Cloud Integration User
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Conne...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Admin (Partner Telephony)	Manage Service Cloud Voice contact centers that use your preferred t...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent (Partner Telephony)	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/> Clone	Contact Center Bring Your Own Channel User	Gives Service Cloud agents access to Messaging functionality and m...	Partner Messaging User
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User

Detailed Steps to Solution Design:

Design custom objects for Employees, Projects, and Asset Tracking

Employees

The screenshot shows the Salesforce Setup interface for the 'Employee' custom object. The left sidebar contains a navigation menu with options: 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, and Restriction Rules. The main content area is titled 'Employee' and includes a 'Details' section with the following fields:

Field	Value
Description	
API Name	Employee__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Employee
Plural Label	Employees
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input type="checkbox"/>
Track Field History	<input type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

Projects

The screenshot shows the Salesforce Setup interface for the 'ProjectTask' custom object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, and Object Access. The main content area is titled 'ProjectTask' and includes a 'Details' section with the following fields:

Field	Value
Description	
API Name	ProjectTask__c
Custom	<input checked="" type="checkbox"/>
Singular Label	ProjectTask
Plural Label	ProjectTasks
Enable Reports	<input type="checkbox"/>
Track Activities	<input type="checkbox"/>
Track Field History	<input type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

Custom objects Tabs

Setup

Home

Object Manager

Search Setup

Setup

Tabs

tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.

SETUP

Tabs

Experience and the mobile app.

Custom Object Tabs

New

What Is This?

Action	Label	Tab Style	Description
Edit Del	Assets	Computer	
Edit Del	Asset Services	Helicopter	
Edit Del	Employees	Motorcycle	
Edit Del	Projects	Gears	
Edit Del	ProjectTasks	Phone	

Web Tabs

New

What Is This?

No Web Tabs have been defined

Visualforce Tabs

New

What Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs

New

What Is This?

No Lightning component tabs have been defined

The Lightning App

Lightning App Builder

App Settings

Pages

Workforce Administrator Solution

Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items 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

Type to filter list...

Accounts

All Sites

Alternative Payment Methods

Analytics

App Launcher

Appointment Categories

Appointment Invitations

Approval Requests

Asset Action Sources

Asset Actions

Selected Items

Employees

Projects

ProjectTasks

Assets

Asset Services


Reports

Dashboards








javascript:void(0);

Fields & Relationships

Employees



Search Setup



SetupHomeObject 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

Fields & Relationships

26 Items, Sorted by Field Label

Q Quick Find

New


Deleted Fields

Field Dependencies








Set History Tracking

Food Allowances	Food_Allowances__c	Checkbox	
Gender	Gender__c	Picklist	
Joining date	Joining_date__c	Date	
Last Modified By	LastModifiedById	Lookup(User)	
LinkedIn Profile	LinkedIn_Profile__c	URL(255)	
Login Time	Login_Time__c	Time	
Logout Time	Logout_Time__c	Time	
Mode of Work	Mode_of_Work__c	Picklist	
Owner	OwnerId	Lookup(User,Group)	✓

Asset



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER
Asset

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Fields & Relationships

8 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Asset Type	Asset_Type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Date Of Issue	Date_Of_Issue__c	Formula (Date)		
Employee Name	Employee_Name__c	Lookup(Employee)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Model Name	Model_Name__c	Text(20)		
Owner	OwnerId	Lookup(User,Group)		✓
Project Task Name	Name	Text(80)		✓

Asset Service

The screenshot shows the Salesforce Setup interface for the 'Asset Service' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, and Object Access. The main content area is titled 'Fields & Relationships' and shows a table of 9 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The items listed are Asset Id, Created By, Description, Last Modified By, Owner, Project Task Name, Subject, Technician, and Type.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Asset Id	Asset_Id__c	Lookup(Asset)		✓
Created By	CreatedById	Lookup(User)		
Description	Description__c	Long Text Area(32768)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Project Task Name	Name	Text(80)		✓
Subject	Subject__c	Text Area(255)		
Technician	Technician__c	Text(20)		
Type	Type__c	Picklist		

Sharing Setting(OWD)

The screenshot shows the Salesforce Setup interface for 'Sharing Settings'. The left sidebar contains a navigation menu with options like Security, Guest User Sharing Rule Access Report, and Sharing Settings. The main content area is titled 'Sharing Settings' and shows a table of sharing settings for various objects. The table has columns for Object, Sharing Model, and Sharing Method. The objects listed are Campaign, Campaign Member, User, Activity, Calendar, Price Book, Product, Individual, Voice Call, Alternative Payment Method, Appointment Invitation, Async Operation Tracker, Authorization Form, Authorization Form Consent, Authorization Form Data Use, Business Brand, Buyer Group, Calculation Procedure, Catalog, and Case.

Object	Sharing Model	Sharing Method
Campaign	Public Full Access	Private
Campaign Member	Controlled by Campaign	Controlled by Campaign
User	Public Read/Write	Public Read/Write
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
Alternative Payment Method	Private	Private
Appointment Invitation	Private	Private
Async Operation Tracker	Private	Private
Authorization Form	Private	Private
Authorization Form Consent	Private	Private
Authorization Form Data Use	Private	Private
Business Brand	Private	Private
Buyer Group	Private	Private
Calculation Procedure	Private	Private
Catalog	Private	Private
Case	Private	Private

User Adoption

Create Employee Record

The screenshot shows the Salesforce interface for creating an employee record. The top navigation bar includes a search bar and various menu items like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Employees, and More. The main header displays the employee's name and ID, along with buttons for 'New Contact', 'Edit', and 'New Opportunity'. The 'Details' tab is active, showing a form with the following fields:

Field	Value	Action
Employee Id	EMS-0016	
Owner	Diwahar S	
Employee Name	allu	Edit
Gender	Male	Edit
Reports to		Edit
Qualification		Edit
Experience	1 year	Edit
Phone no	45637890	Edit
Email	diwa@gmail.com	Edit

At the bottom left, there is a 'To Do List' icon.

Delete Employee Record


The screenshot shows the Salesforce interface for the 'Employees' list. The top navigation bar is the same as in the previous screenshot. The main header displays 'Employees' and 'Recently Viewed' with a filter icon. Below the header, there are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. A search bar labeled 'Search this list...' is present. The list shows one item: 'Employee Id EMS-0016'. A confirmation dialog box is open in the center of the screen, asking 'Are you sure you want to delete this Employee?'. The dialog has 'Cancel' and 'Delete' buttons.

Delete Employee

Are you sure you want to delete this Employee?

Cancel Delete

Importing data using Data Wizard



Search Setup

Setup

Home

Object Manager


Help for this page

Data Import Wizard

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Employee	14	0	0	11-13-2024 09:48	68

Bulk Api Monitoring



Before you import your data...

Clean up your data import file

You'll have fewer errors to resolve if your data file is clean and free of duplicates. [Watch video](#)

Make sure your field names match Salesforce field names

You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. [View a list of Salesforce data fields.](#)

Don't import too many records at once


Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

Collapse

Import your data in 3 easy steps!

Profiles

HR Profile



Search Setup

Setup

Home

Object Manager

Help for this Page

Q prof

Users

Profiles

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

SETUP

Profiles

Clone Profile

Help for this Page

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile

Gold Partner User

User License

Gold Partner

Profile Name

HR

Save

Cancel

Manager 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.

Search Setup

Star

Plus

Home

Help

Settings

12

Avatar

SETUP

Users

User Profile Help for this Page

User

Kol Mikaelson

Permission Set Assignments | Permission Set Assignments: Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Personal Groups | Public Group Membership | Queue Membership | Team | Managers in the Role Hierarchy | OAuth Apps | Third-Party Account Links | Installed Mobile Apps | Authentication Settings for External Systems | Login History | User Provisioning Accounts

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Kol Mikaelson	Role	Manager
Alias	kmila	User License	Salesforce Platform
Email	selvarajdiwaha@gmail.com [Verify]	Profile	Manager
Username	kol@nce.com	Active	✓
Nickname	User17314950957391816952	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	Thiruvathur Melur 625110 Please select a country India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i

Employee 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.

Search Setup

Star

Plus

Home

Help

Settings

12

Avatar

SETUP

Users

User Profile Help for this Page

User

Diwahaar S

Permission Set Assignments | Permission Set Assignments: Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Personal Groups | Public Group Membership | Queue Membership | Team | Managers in the Role Hierarchy | OAuth Apps | Third-Party Account Links | Installed Mobile Apps | Authentication Settings for External Systems | Login History | User Provisioning Accounts

User Detail

Edit

Sharing

Change Password

View Summary

javascript:srcUp(%27%2F005Qy000009Kv%3FnoRedirect%3D1%26isUserEntityOverride%3D1%26isDp%3Dp1%27);

Role

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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

Search Setup

Setup

Home

Object Manager

Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Collapse All

Expand All

Tamilnadu college of engineering

Add Role

CEO

Add Role

Show in tree view

Users

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.

Search Setup

Setup

Home

Object Manager

Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users

Edit

Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User

Reset Password(s)

Add Multiple Users

Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dny00000fwmkyma5.qtb&mbd0xs@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	england_peter	peter	peter@eng.com	On Site Employee	✓	On Site Employee
<input type="checkbox"/> Edit	Mikaelson_Kol	kmila	kol@tnce.com	Manager	✓	Manager
<input type="checkbox"/> Edit	Mikaelson_Niklaus	nik	nik@mll.com	HR	✓	HR
<input type="checkbox"/> Edit	S_Diwahar	DS	diwahar@tce.com		✓	System Administrator
<input type="checkbox"/> Edit	thomas_tovino	tthom	toino@tce.com	Remote Employee	✓	Remote Employee
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dny00000fwmkyma5.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dny00000fwmkyma5.com		✓	Analytics Cloud Security User

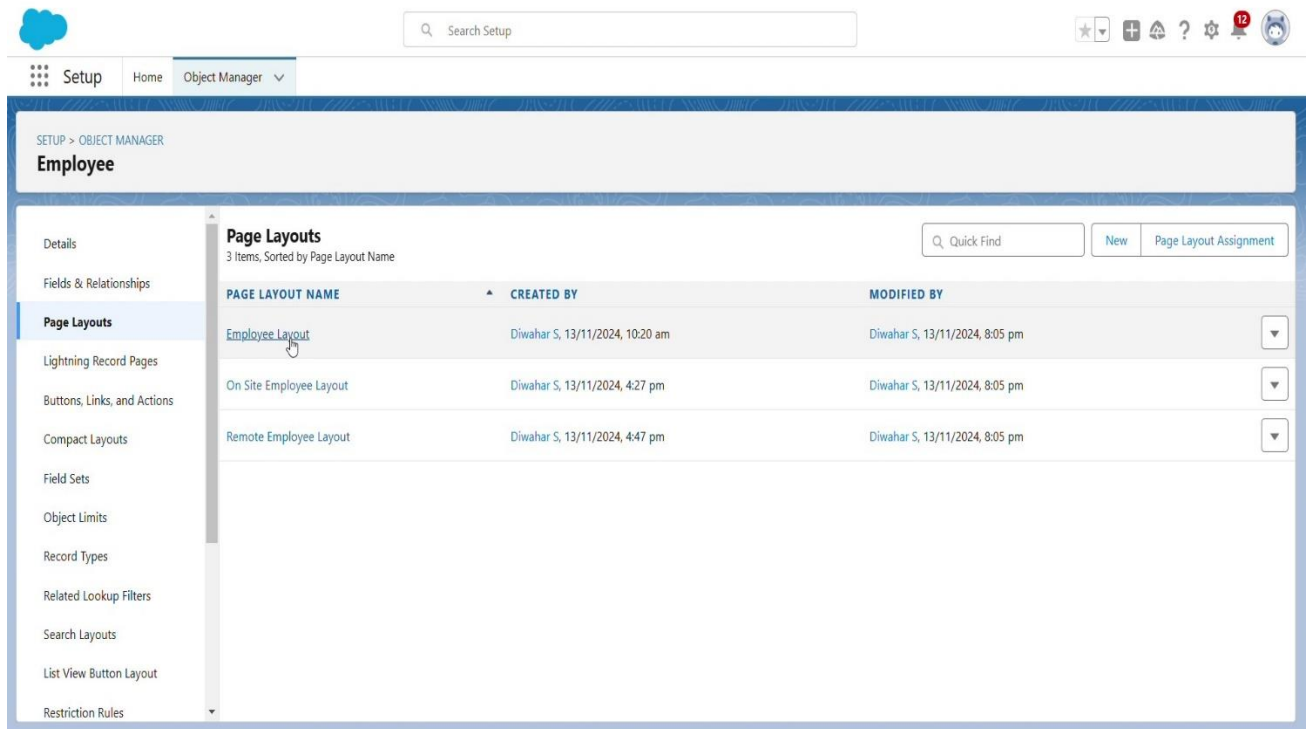
New User

Reset Password(s)

Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

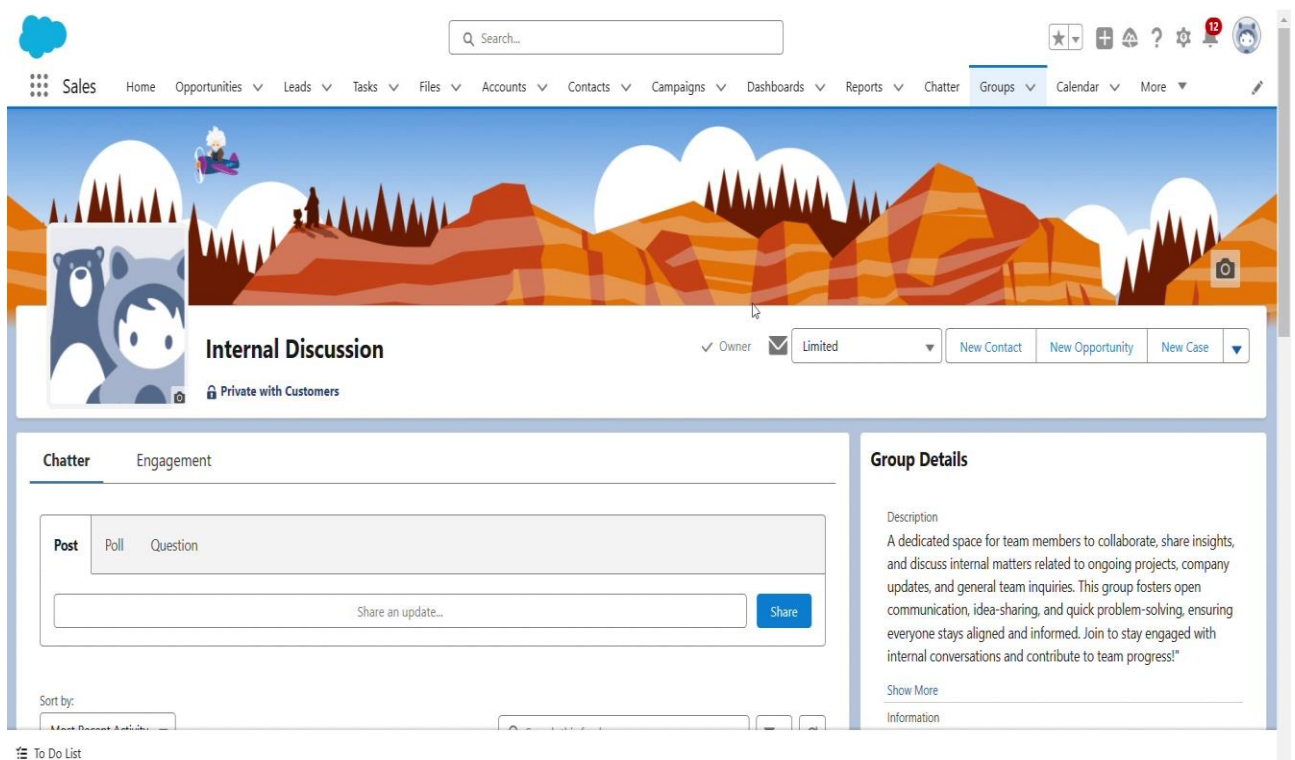
Page layouts



The screenshot shows the Salesforce Setup interface, specifically the 'Object Manager' for the 'Employee' object. The left sidebar contains a navigation menu with options like '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', and 'Restriction Rules'. The main content area is titled 'Page Layouts' and shows a table with 3 items, sorted by Page Layout Name. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The items listed are 'Employee Layout', 'On Site Employee Layout', and 'Remote Employee Layout', all created by 'Diwahar S.' on 13/11/2024. A 'Quick Find' search bar and 'New' and 'Page Layout Assignment' buttons are also visible.

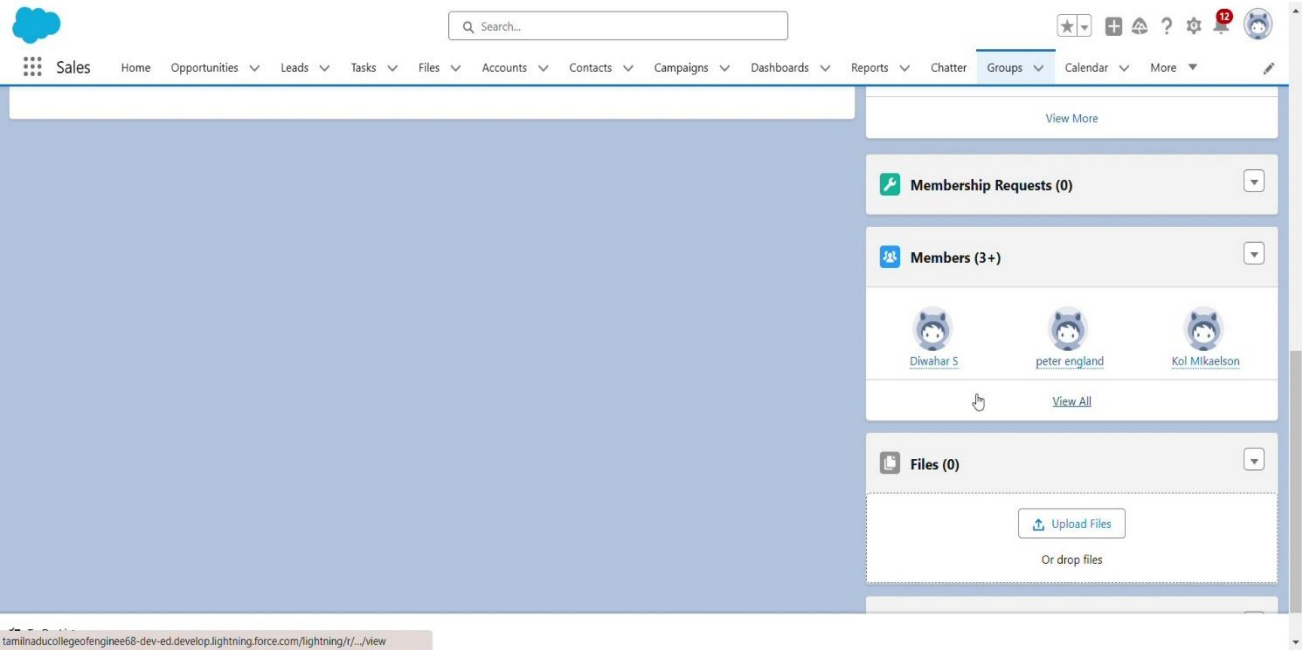
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Employee Layout	Diwahar S, 13/11/2024, 10:20 am	Diwahar S, 13/11/2024, 8:05 pm
On Site Employee Layout	Diwahar S, 13/11/2024, 4:27 pm	Diwahar S, 13/11/2024, 8:05 pm
Remote Employee Layout	Diwahar S, 13/11/2024, 4:47 pm	Diwahar S, 13/11/2024, 8:05 pm

Chatter group



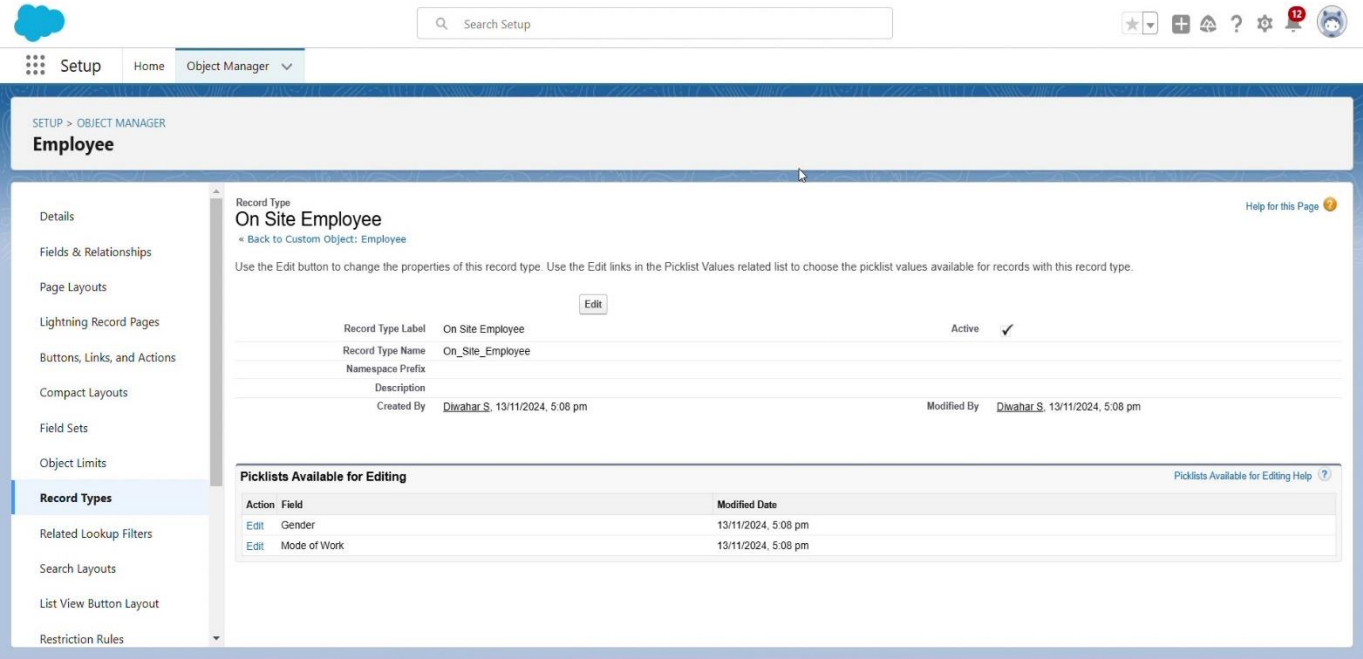
The screenshot shows the Salesforce Chatter interface for a group named 'Internal Discussion'. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups' (selected), 'Calendar', and 'More'. The group header features a banner image of a mountain landscape, a profile picture of a person, and the group name 'Internal Discussion'. Below the header, there are tabs for 'Chatter' and 'Engagement'. The 'Chatter' tab is active, showing a post creation area with a text input field labeled 'Share an update...' and a 'Share' button. To the right, the 'Group Details' section shows the group's description: 'A dedicated space for team members to collaborate, share insights, and discuss internal matters related to ongoing projects, company updates, and general team inquiries. This group fosters open communication, idea-sharing, and quick problem-solving, ensuring everyone stays aligned and informed. Join to stay engaged with internal conversations and contribute to team progress!'. There are also buttons for 'New Contact', 'New Opportunity', and 'New Case'.

Internal discussion group



Record types

On Site Employee Record Type



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

Record Type

Remote Employee

◀ Back to Custom Object: Employee

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	Remote Employee	Active	✓
Record Type Name	Remote_Employee		
Namespace Prefix			
Description			
Created By	Diwahar S, 13/11/2024, 5:10 pm	Modified By	Diwahar S, 13/11/2024, 5:10 pm

Picklists Available for EditingPicklists Available for Editing Help ?

Action	Field	Modified Date
Edit	Gender	13/11/2024, 5:10 pm
Edit	Mode of Work	13/11/2024, 5:10 pm

Design permission sets for different user roles:

Permission sets

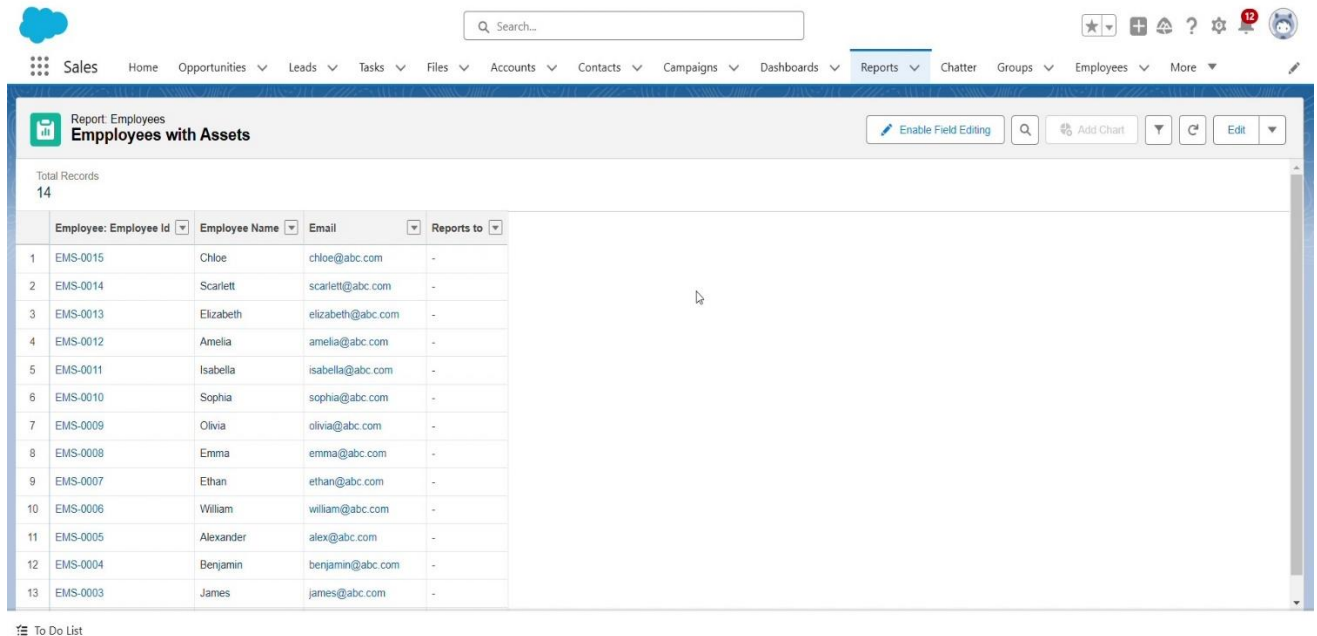
The screenshot shows the Salesforce Setup interface. On the left sidebar, the navigation menu includes 'Setup' (selected), 'Home', 'Object Manager', 'Users', 'Permission Set Groups', 'Permission Sets' (highlighted), 'Custom Code', and 'Custom Permissions'. The main content area is titled 'SETUP Permission Sets'. Below the title, it states: 'On this page you can create, view, and manage permission sets.' There are links for 'All Permission Sets' (selected), 'Edit', 'Delete', and 'Create New View'. A table lists various permission sets, each with a checkbox, an action link ('Clone'), a label, a description, and a license name. The row for 'Contact Center Admin (Partner Telephony)' is highlighted. At the bottom, there's a pagination bar showing '1-25 of 96' items, '0 Selected', and 'Page 1 of 3'.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Authenticated Payer	An authenticated external user with the ability to make and manage th...	Salesforce Payments External
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Scal...	Cloud Integration User
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Conne...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Admin (Partner Telephony)	Manage Service Cloud Voice contact centers that use your preferred L...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent (Partner Telephony)	Access agent features in Service Cloud Voice contact centers that us...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/> Clone	Contact Center Bring Your Own Channel User	Gives Service Cloud agents access to Messaging functionality and m...	Partner Messaging User
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User

Develop custom reports and dashboards:

Reports

Employees with Assets

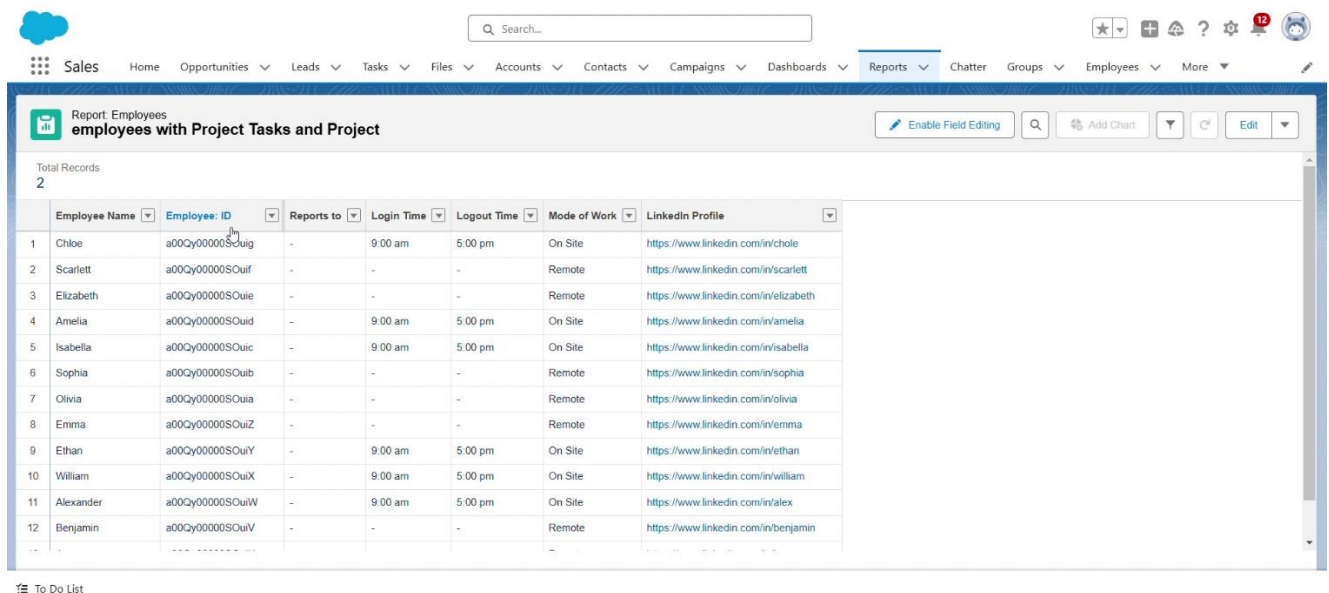


The screenshot shows the Salesforce Reports interface. The report is titled "Employees with Assets" and has 14 total records. The table displays columns for Employee ID, Employee Name, Email, and Reports to. The data is as follows:

	Employee: Employee Id	Employee Name	Email	Reports to
1	EMS-0015	Chloe	chloe@abc.com	-
2	EMS-0014	Scarlett	scarlett@abc.com	-
3	EMS-0013	Elizabeth	elizabeth@abc.com	-
4	EMS-0012	Amelia	amelia@abc.com	-
5	EMS-0011	Isabella	isabella@abc.com	-
6	EMS-0010	Sophia	sophia@abc.com	-
7	EMS-0009	Olivia	olivia@abc.com	-
8	EMS-0008	Emma	emma@abc.com	-
9	EMS-0007	Ethan	ethan@abc.com	-
10	EMS-0006	William	william@abc.com	-
11	EMS-0005	Alexander	alex@abc.com	-
12	EMS-0004	Benjamin	benjamin@abc.com	-
13	EMS-0003	James	james@abc.com	-

Below the table, there is a "To Do List" section.

Employees with ProjectTasks and Projects



The screenshot shows the Salesforce Reports interface. The report is titled "employees with Project Tasks and Project" and has 2 total records. The table displays columns for Employee Name, Employee ID, Reports to, Login Time, Logout Time, Mode of Work, and LinkedIn Profile. The data is as follows:

	Employee Name	Employee ID	Reports to	Login Time	Logout Time	Mode of Work	LinkedIn Profile
1	Chloe	a00Qy00000SCuig	-	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/chloe
2	Scarlett	a00Qy00000SCuif	-	-	-	Remote	https://www.linkedin.com/in/scarlett
3	Elizabeth	a00Qy00000SCuie	-	-	-	Remote	https://www.linkedin.com/in/elizabeth
4	Amelia	a00Qy00000SCuid	-	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/amelia
5	Isabella	a00Qy00000SCuic	-	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/isabella
6	Sophia	a00Qy00000SCuib	-	-	-	Remote	https://www.linkedin.com/in/sophia
7	Olivia	a00Qy00000SCuia	-	-	-	Remote	https://www.linkedin.com/in/olivia
8	Emma	a00Qy00000SCuiz	-	-	-	Remote	https://www.linkedin.com/in/emma
9	Ethan	a00Qy00000SCuiY	-	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/ethan
10	William	a00Qy00000SCuiX	-	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/william
11	Alexander	a00Qy00000SCuiW	-	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/alex
12	Benjamin	a00Qy00000SCuiV	-	-	-	Remote	https://www.linkedin.com/in/benjamin

Below the table, there is a "To Do List" section.

Dashboards

Dashboard 1

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

Employees

More

Q Search...

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12

👤

Dashboard

Dashboard 1

Last refreshed 2 days ago. Refresh this dashboard to see the latest data.

As of 13-Nov-2024, 7:46 pm Viewing as Diwahar S

Refresh

Edit

Subscribe

Employees with Assets

Employee: Employee Id ↑	Employee Name	Email	Reports to
EMS-0002	Jackie Chan	jackie@abc.com	-
EMS-0003	James	james@abc.com	-
EMS-0004	Benjamin	benjamin@abc.com	-
EMS-0005	Alexander	alex@abc.com	-
EMS-0006	William	william@abc.com	-
EMS-0007	Ethan	ethan@abc.com	-
EMS-0008	Emma	emma@abc.com	-

View Report (Employees with Assets)

📋 To Do List

Dashboard 2

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

Employees

More

Q Search...

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12

👤

Dashboard

Dashboard 2

Last refreshed 6 days ago. Refresh this dashboard to see the latest data.

As of 13-Nov-2024, 7:48 pm Viewing as Diwahar S

Refresh

Edit

Subscribe

employees with Project Tasks and Project

Employee Name: ↑	Employee: ID	Reports...	Login Ti...	Logout Time
Alexander	a00Qy00000SOuIW	-	9:00 am	5:00 pm
Amelia	a00Qy00000SOuid	-	9:00 am	5:00 pm
Benjamin	a00Qy00000SOuIV	-	-	-
Chloe	a00Qy00000SOuig	-	9:00 am	5:00 pm
Elizabeth	a00Qy00000SOuie	-	-	-
Emma	a00Qy00000SOuiz	-	-	-
Ethan	a00Qy00000SOuY	-	9:00 am	5:00 pm

View Report (employees with Project Tasks and Project)

📋 To Do List

Approval Process

Leave approval request

The screenshot shows the Salesforce Setup interface for the 'Leave: Leave Approval Request' process. The left sidebar contains navigation links for 'Data' (Mass Transfer, Approval Requests) and 'Process Automation' (Approval Processes). The main content area is titled 'Approval Processes' and shows the details for the 'Leave: Leave Approval Request' process. The 'Process Definition Detail' section includes fields for Process Name, Unique Name, Description, Entry Criteria, Record Editability, Approval Assignment Email Template, Initial Submitters, and Created By. The 'Initial Submission Actions' section shows a table with actions like 'Record Lock' and 'Field Update'. The 'Approval Steps' section shows a table with steps like 'Step 1' and 'Approval from HR'.

Process Definition Detail

Field	Value
Process Name	Leave Approval Request
Unique Name	Leave_Approval_Request
Description	
Entry Criteria	
Record Editability	Administrator ONLY
Approval Assignment Email Template	
Initial Submitters	Leave Owner
Created By	Diwahar S. 13/11/2024, 8:24 pm

Initial Submission Actions

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

Approval Steps

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

Approval steps and Rejection action

The screenshot shows the Salesforce Setup interface for the 'Leave: Leave Approval Request' process, focusing on the 'Approval Steps' section. The left sidebar contains navigation links for 'Data' (Mass Transfer, Approval Requests) and 'Process Automation' (Approval Processes). The main content area is titled 'Approval Processes' and shows the details for the 'Leave: Leave Approval Request' process. The 'Approval Steps' section shows a table with steps like 'Step 1' and 'Approval from HR'. The 'Final Approval Actions' section shows a table with actions like 'Record Lock' and 'Field Update'. The 'Final Rejection Actions' section shows a table with actions like 'Record Lock' and 'Field Update'. The 'Recall Actions' section shows a table with actions like 'Record Lock'.

Approval Steps

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

Final Approval Actions

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

Final Rejection Actions

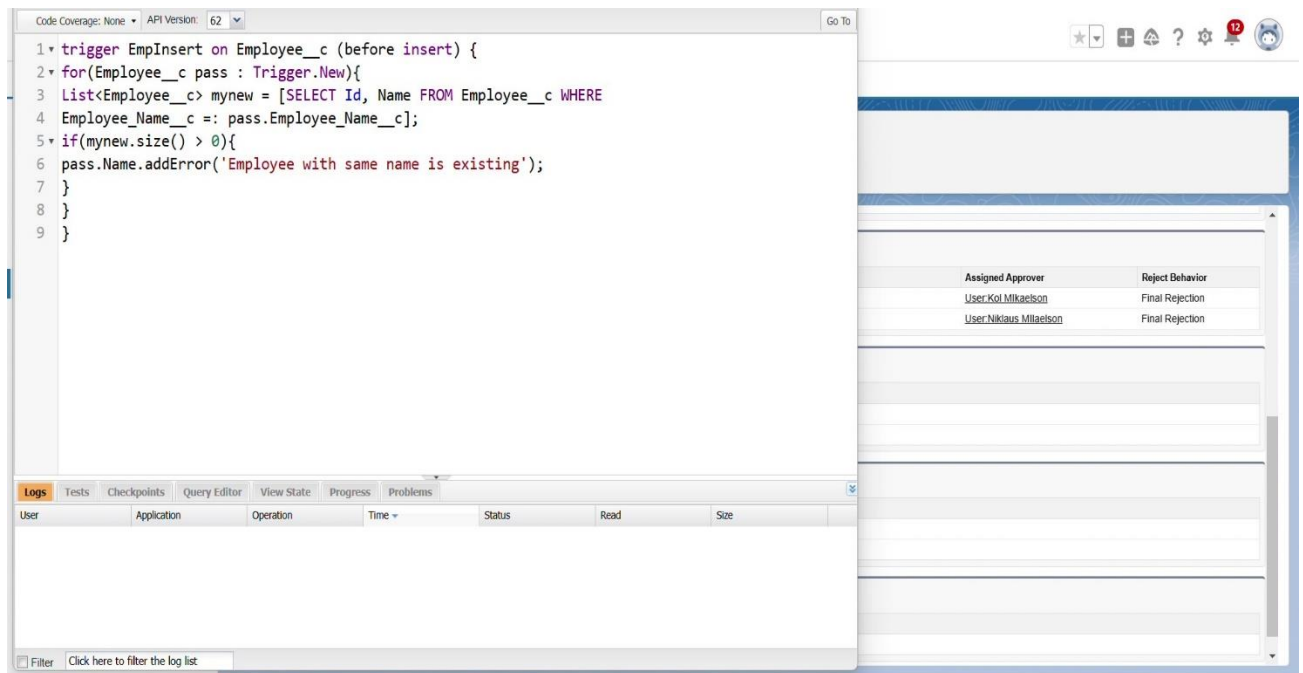
Action	Type	Description
Record Lock		Unlock the record for editing
Field Update		Approval Status to Rejected

Recall Actions

Action	Type	Description
Record Lock		Unlock the record for editing

Apex Trigger

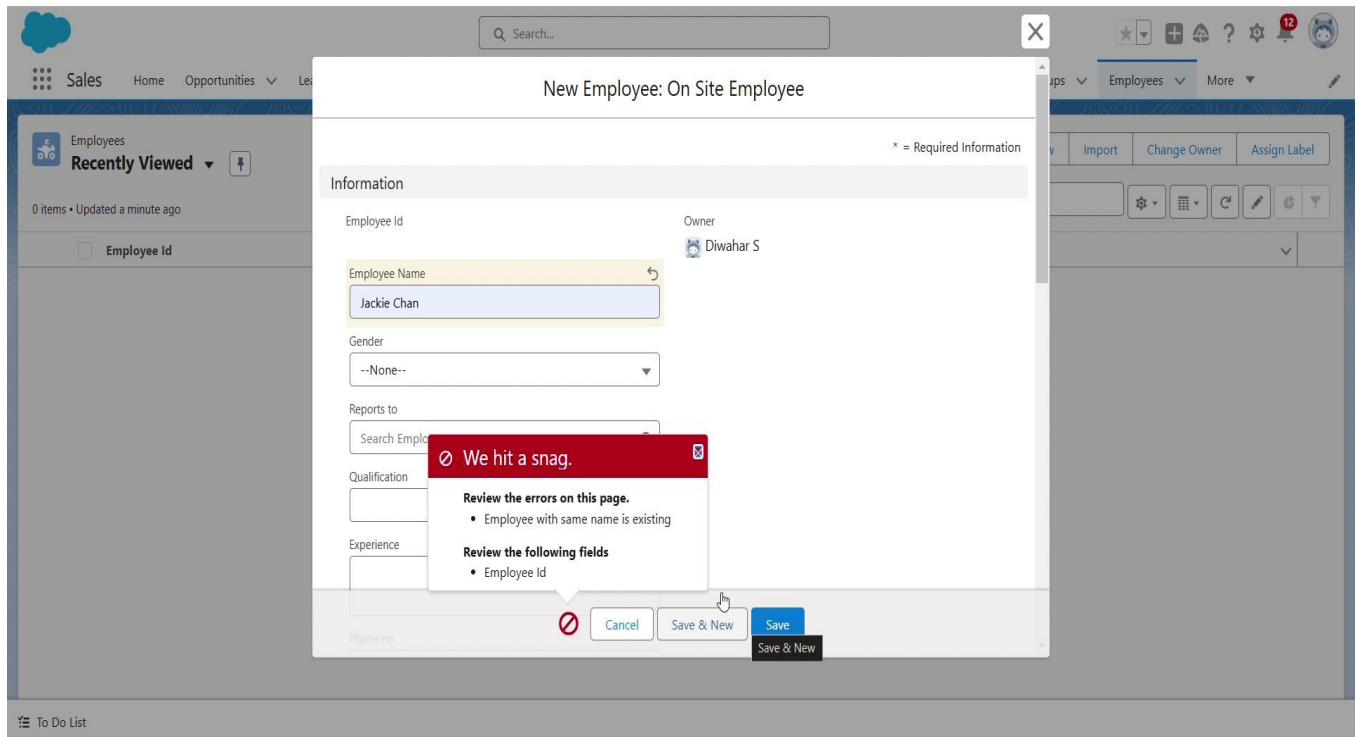
Creating an Apex Trigger



Source Code

```
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');  
        }  
    }  
}
```

Testing the Trigger



Testing and Validation:

- Unit Testing for Apex Classes and Triggers
- User Interface Testing across different user profiles
- Performance testing for reporting and dashboard functionality
- Integration testing with existing systems
- User Acceptance Testing (UAT)

Key Scenarios Addressed:

- Real-time project assignment tracking
- Asset allocation and return process
- Performance monitoring and reporting
- Resource utilization analysis
- Compliance and audit trail maintenance

Conclusion

Summary of Achievements:

- Successfully developed a comprehensive Workforce Administration Solution
- Implemented a centralized system for employee and asset management
- Enhanced organizational efficiency through automated tracking and reporting
- Provided real-time insights into workforce utilization and asset allocation