



Workforce Administration Solution (Dev)

College: 7155 - PSG Institute of Technology and Applied Research

Team ID: NM2024TMID00582

Team Lead: [ALISHA SHINAZ N](#) - 49D1366B405CF82A04C485A37AA9D2EC

Team Members:

| | |
|--------------------|---|
| Alisha Shinaz N | 49D1366B405CF82A04C485A37AA9D2EC |
| Shrishti Krishna | 1485937A6BEC818A03E44A5210BDF0D5 |
| Lakshana R | 7A8F064C7EAD32DB89F48F37BCF86EA9 |
| Thanisha Shimnaz N | 2D918D6BA2D4C7DAFFC4D9874E49331B |
| Harshitaa G A | BF81091284AF8D586FA4DE069E284309 |

1. Project Overview

The Workforce Administration Solution project is a software application focused on enhancing efficiency in managing employees' project assignments and asset allocation within an organization. The solution functions as a centralized platform that automates data management and streamlines tracking for employee projects and asset assignments, resulting in improved resource allocation, project oversight, and asset management. This solution is designed to simplify and automate the process of tracking employees' project involvement, performance, and the assets assigned to them.

2. Objectives

Centralized Employee and Project Data Management: Maintain a complete, up-to-date repository of employee information and project assignments, accessible by HR, team leads, and project managers.

Project Tracking and Employee Allocation: Track the number and status of projects an employee is involved in, monitor individual workloads, and facilitate more effective team and resource allocation.

Asset Assignment Management: Streamline asset allocation by tracking which resources (laptops, devices, software licenses, etc.) are assigned to employees, ensuring accountability and ease of asset retrieval.

Performance Monitoring and Reporting: Enable project managers to track employee contributions and performance across projects, with the ability to analyze productivity and identify areas for improvement.

Efficient Resource Utilization: Improve the allocation of human resources and assets to ensure that employees are not underutilized or overburdened, thus enhancing project outcomes and asset ROI.

Specific Outcomes:

- **Improved Resource Allocation:** Enhanced visibility into project assignments and asset allocation to reduce over-allocation or underutilization.
- **Asset Accountability:** Better control over assets with an easy-to-manage system to track, assign, and retrieve items, leading to reduced asset loss or mismanagement.
- **Increased Productivity:** By allowing managers to monitor workloads and performance metrics, the system encourages better alignment of employee skills to projects and tasks.
- **Actionable Insights:** Analytics and reporting empower decision-makers with insights to adjust resources and support employee performance improvements.

3. Salesforce Key Features and Concepts Utilized

- Object
 - Employee, Project, Asset, Task, and Performance Review: Custom objects created to store essential data about workforce details, project assignments, assets, tasks, and performance metrics.
- Tabs
 - Tabs Setup: Configured tabs for each custom object to allow easy navigation for users, enabling quick access to Employee, Project, Asset, and Task records within the app.
- The Lightning App
 - Workforce Manager Lightning App: Customized the app for branding and streamlined user access, offering an organized interface for workforce and asset management.
- Fields & Relationships
 - Custom Fields and Relationships: Added relevant fields (e.g., Project Start Date, Asset Condition, Performance Rating) and set up relationships, such as Employee-to-Project and Project-to-Task, to organize and link essential data.
- Setting OWD (Organization-Wide Defaults)
 - OWD Settings: Configured data access at the organization level, setting appropriate access controls (e.g., private or read-only) for objects like Employee and Asset to maintain data security and compliance.
- User Adoption
 - User Training and Support: Provided training materials and conducted sessions to ensure users understood and effectively utilized the app's features for streamlined workforce management.
- Import Data

Data Import: Used Data Import Wizard and Data Loader to upload initial records for Employees, Projects, and Assets, ensuring a seamless transition to the new system.

- Profiles

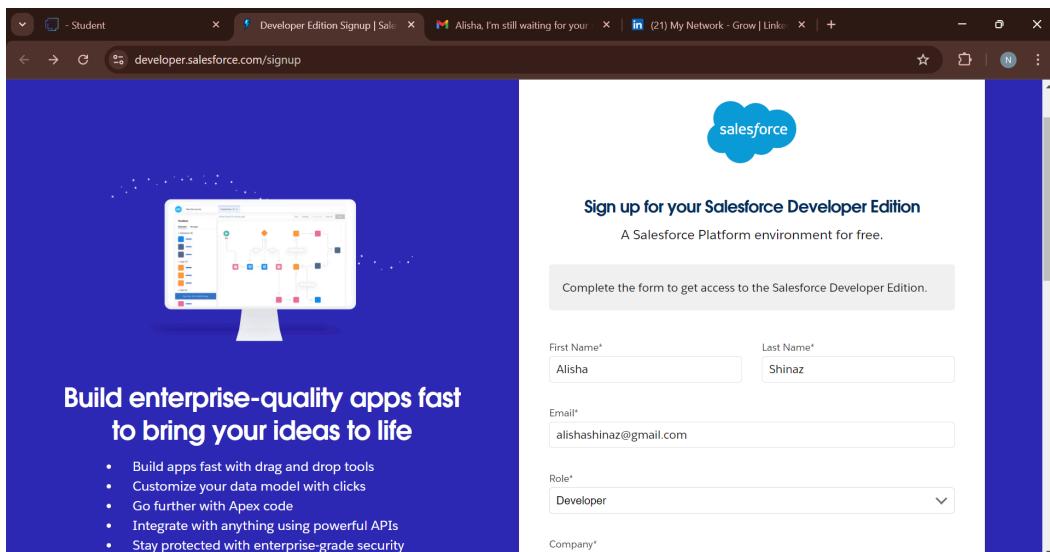
- User Profiles: Defined profiles (e.g., HR, Project Manager, Employee) to control access to objects, fields, and features based on user roles and responsibilities.
- Role
 - Role Hierarchy: Set up a role hierarchy to define data visibility and reporting structure, ensuring managers can access subordinate data while protecting sensitive information.
- Users
 - User Creation: Added users with designated profiles and roles, providing them access to specific records and functionalities according to their responsibilities.
- Page Layouts
 - Custom Page Layouts: Designed layouts for each object (e.g., Project, Asset) to display relevant fields and actions, enhancing user experience and data entry efficiency.
- Chatter Group
 - Chatter Groups: Created groups (e.g., Project Team, HR Discussions) for real-time collaboration and knowledge sharing, allowing teams to discuss updates and resolve issues efficiently.
- Record Types
 - Record Types for Projects and Assets: Set up different record types to categorize various types of projects (e.g., Internal, Client) and assets (e.g., IT Equipment, Office Supplies) for more specific management and reporting.
- Permission Sets
 - Permission Sets: Assigned additional permissions to users who required special access (e.g., HR needing access to restricted Employee data), without changing their profiles.
- Reports
 - Custom Reports: Built reports to track project progress, employee workload, asset usage, and performance, providing insights for better decision-making.
- Dashboards

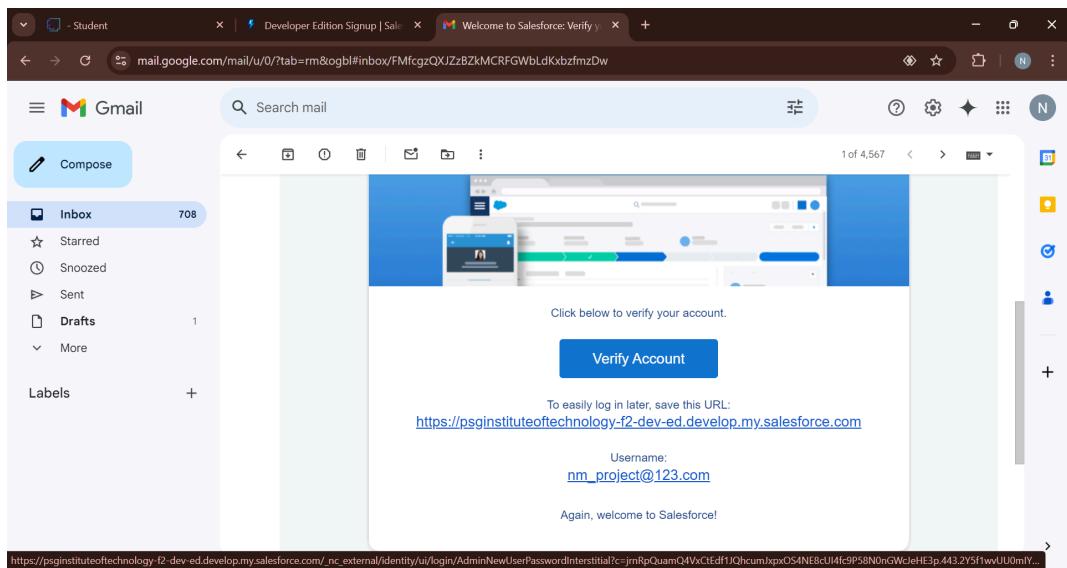
- Workforce Dashboard: Created a comprehensive dashboard displaying metrics such as resource allocation, project status, and asset distribution for management visibility.
- Approval Process
 - Approval Workflow for Asset Requests: Set up an approval process for employees to request assets, which requires **manager** approval before assets are assigned, ensuring control and accountability.
- Apex Trigger
 - Automated Notifications and Calculations: Developed Apex triggers to automate notifications for project status updates, asset returns, and performance metrics based on project completion and asset utilization.

4. Detailed Steps to Solution Design

1. Created Salesforce Developer Account

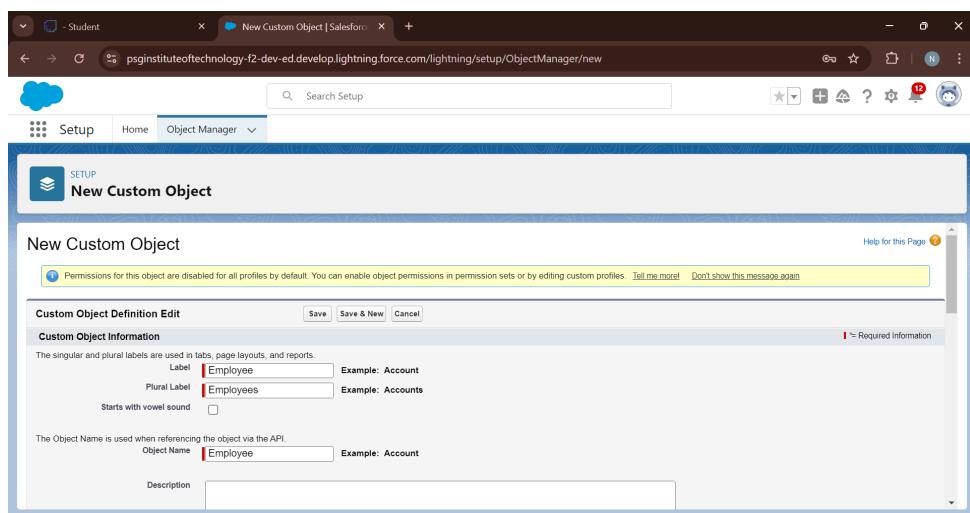
- We began by creating a Salesforce Developer Account to access a development environment where we could build and customize the application. This setup provided the necessary tools to design, test, and deploy the application.





2. Defined Objects

- Employee objects and Project objects were created.
- Create 3 more objects with label names as ProjectTask, Asset, Asset Service.



The image displays three separate screenshots of the Salesforce Setup interface, specifically the Object Manager section, arranged vertically. Each screenshot shows the configuration details for a different custom object: Employee, Project, and ProjectTask.

Employee Object Configuration:

- API Name:** Employee__c
- Custom:** ✓
- Singular Label:** Employee
- Plural Label:** Employees
- Description:** (empty)
- Enable Reports:** ✓
- Track Activities:** (empty)
- Track Field History:** (empty)
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

Project Object Configuration:

- API Name:** Project__c
- Custom:** ✓
- Singular Label:** Project
- Plural Label:** Projects
- Description:** (empty)
- Enable Reports:** ✓
- Track Activities:** (empty)
- Track Field History:** (empty)
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

ProjectTask Object Configuration:

- API Name:** ProjectTask__c
- Custom:** ✓
- Singular Label:** ProjectTask
- Plural Label:** ProjectTasks
- Description:** (empty)
- Enable Reports:** ✓
- Track Activities:** (empty)
- Track Field History:** (empty)
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

The screenshot shows the Salesforce Setup interface with the URL `psginstitutetechnology-f2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dM000002pUkT/Details/view`. The page title is "Asset | Salesforce". The main content area is titled "SETUP > OBJECT MANAGER" and "Asset". On the left, there is a sidebar with a "Details" tab selected, followed by a list of configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main right panel is titled "Details" and contains fields for Description, API Name (Asset__c), Singular Label (Asset), Plural Label (Assets), and various status and reporting settings like Enable Reports, Track Activities, and Deployment Status (Deployed). There are "Edit" and "Delete" buttons at the top right.

The screenshot shows the Salesforce Setup interface with the URL `psginstitutetechnology-f2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dM000002pUqy/Details/view`. The page title is "Asset Service | Salesforce". The main content area is titled "SETUP > OBJECT MANAGER" and "Asset Service". The sidebar and main panel structure are identical to the Asset object, with the API Name being Asset_Service__c, Singular Label being Asset Service, and Plural Label being Asset Services. The right panel includes fields for Description, API Name (Asset_Service__c), Singular Label (Asset Service), Plural Label (Asset Services), and various status and reporting settings like Enable Reports, Track Activities, and Deployment Status (Deployed).

3. Configured Tabs

- Corresponding tabs were created for each of the main objects to facilitate easy access within Salesforce.
- Tabs for Employee, Project and other objects were set up.

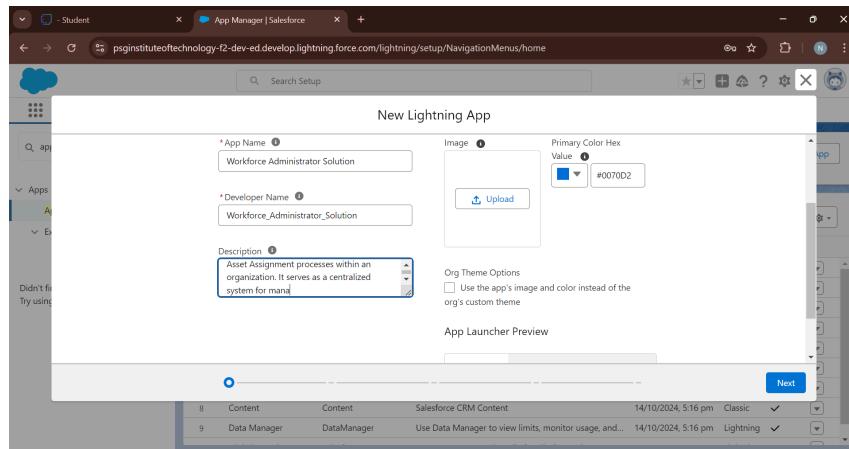
The screenshot shows the Salesforce Setup interface with the 'Tabs' page open. The URL is psginstituteoftechnology-f2-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTa.... The page title is 'Tabs | Salesforce'. The left sidebar shows 'User Interface' and 'Tabs'. The main content area is titled 'Step 1. Enter the Details' and 'New Custom Object Tab'. It asks to choose a custom object or create a new one. The 'Object' dropdown is set to 'Employee' and 'Tab Style' is 'Jewel'. An optional 'Splash Page Custom Link' is set to 'None'. A 'Description' field is present.

This screenshot is identical to the one above, showing the 'Tabs' configuration page for creating a new custom object tab. The URL is the same: psginstituteoftechnology-f2-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTa.... The setup steps are identical, with 'Object' set to 'Employee' and 'Tab Style' set to 'Jewel'.

The screenshot shows the 'Custom Tabs' configuration page in the Salesforce Setup interface. The URL is psginstituteoftechnology-f2-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2Fcustomtabs.jsp%3Fs.... The page title is 'Custom Tabs'. It includes a 'Quick Find' search bar and a 'Help for this Page' link. The main content area is titled 'Custom Object Tabs' and lists tabs for 'Assets', 'Asset Services', 'Employees', 'Projects', and 'Project Tasks'. Each row has 'Action' (Edit | Del) and 'Label' columns, and a 'Tab Style' column showing icons for Leaf, Postage, Jewel, Lightning, and Airplane respectively. A 'Description' column is also present.

4. Developed the Lightning App

- We created a custom Lightning App named "**Workforce Administrator Solution**" to consolidate all project functionalities.
- The app was configured with specific branding, navigation items, and user access settings, which made it intuitive and easy to use for project participants.



| Lightning Experience App Manager | | | | | | |
|--|----------------------------|---|---------------------|-----------|---------|---------|
| 24 items • Sorted by Last Modified Date • Filtered by All appmenuitems - TabSet Type, App Type | | | | | | |
| App Name | Developer Name | Description | Last Modified... | App ... | Visi... | Actions |
| 1 Workforce Administrator Solution | Workforce_Administrator... | Workforce Administration Solution is a software application or platform designed t... | 14/10/2024, 7:45 pm | Lightning | ✓ | |
| 2 Business Rules Engine | ExpressionSetConsole | Create and maintain business rules that perform complex lookups and calculations. | 14/10/2024, 5:21 pm | Lightning | ✓ | |
| 3 Automation | FlowsApp | Automate business processes and repetitive tasks. | 14/10/2024, 5:21 pm | Lightning | ✓ | |
| 4 Salesforce Scheduler Setup | LightningScheduler | Set up personalized appointment scheduling. | 14/10/2024, 5:18 pm | Lightning | ✓ | |
| 5 Queue Management | QueueManagement | Create and manage queues for your business. | 14/10/2024, 5:16 pm | Lightning | ✓ | |
| 6 All Tabs | AllTabSet | | 14/10/2024, 5:16 pm | Classic | | |
| 7 Subscription Management | RevenueCloudConsole | Get started automating your revenue processes | 14/10/2024, 5:16 pm | Lightning | ✓ | |
| 8 Data Manager | DataManager | Use Data Manager to view limits, monitor usage, and manage recipes. | 14/10/2024, 5:16 pm | Lightning | ✓ | |
| 9 Digital Experiences | SalesforceCMS | Manage content and media for all of your sites. | 14/10/2024, 5:16 pm | Lightning | ✓ | |
| 10 Platform | Platform | The fundamental Lightning Platform | 14/10/2024, 5:16 pm | Classic | | |
| 11 Sales | Sales | The world's most popular sales force automation (SFA) solution | 14/10/2024, 5:16 pm | Classic | | |

5. Added Fields to Objects

- Creating Text Field in Employee Object
- Creating Date of Birth Field in Employee Object

- Creating Formula Field in Employee Object
- Creating Picklist Field in Employee Object
- Creating Self-Relationship Field in Employee Object
- Creating Master-Detail Relationship between Employee & Asset Object
- Creating Remaining Fields in Employee Object

SETUP > OBJECT MANAGER

Employee

Fields & Relationships

| | |
|--------------------------------|---|
| Details | Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance. |
| Number | Allows users to enter any number. Leading zeros are removed. |
| Percent | Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number. |
| Phone | Allows users to enter any phone number. Automatically formats it as a phone number. |
| Picklist | Allows users to select a value from a list you define. |
| Picklist (Multi-Select) | Allows users to select multiple values from a list you define. |
| Text | Allows users to enter any combination of letters and numbers. |
| Text Area | Allows users to enter up to 255 characters on separate lines. |
| Text Area (Long) | Allows users to enter up to 131,072 characters on separate lines. |
| Text Area (Rich) | Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines. |
| Text (Encrypted) <i>[Info]</i> | Allows users to enter any combination of letters and numbers and store them in encrypted form. |
| Time | Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field. |
| URL | Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window. |

SETUP > OBJECT MANAGER

Employee

Fields & Relationships

| | |
|------------------------------|---|
| Details | <ul style="list-style-type: none"> When a user deletes the master record, all detail records are deleted. You can create rollup summary fields on the master record to summarize the detail records. <p>The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.</p> |
| External Lookup Relationship | Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org. |
| Checkbox | Allows users to select a True (checked) or False (unchecked) value. |
| Currency | Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet. |
| Date | Allows users to enter a date or pick a date from a popup calendar. |
| Date/Time | Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field. |
| Email | Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails. |
| Geolocation | Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance. |
| Number | Allows users to enter any number. Leading zeros are removed. |
| Percent | Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number. |

Screenshot of the Salesforce Object Manager setup page for the Employee object.

The left sidebar shows navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters.

The main content area is titled "Data Type". It lists several options:

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship

Each option has a detailed description and examples.

Screenshot of the Salesforce Object Manager setup page for the Employee object, showing the creation of a new field.

The left sidebar shows navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters.

The main content area shows the configuration for a new field named "Age".

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: Number

Other options shown but not selected: None Selected, Checkbox, Currency, Date, Date/Time.

Employee

Step 2: Define the Values

Field Label: Gender

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line

Male
Female

Display values alphabetically, not in the order entered

Use first value as default value

Restrict picklist to the values defined in the value set

Field Name: gender

Employee

Fields & Relationships

- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
-

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

ProjectTask

Fields & Relationships

- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
-

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

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- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

6. Setting OWD

- Create OWD Setting
- Set OWD as Private for Project and Asset Service objects

Sharing Settings

| | | | |
|--------------------|-------------------|---------|-------------------------------------|
| Work Plan Template | Private | Private | <input checked="" type="checkbox"/> |
| Work Step Template | Private | Private | <input checked="" type="checkbox"/> |
| Work Type | Private | Private | <input checked="" type="checkbox"/> |
| Work Type Group | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Asset | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Asset Service | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Employee | Private | Private | <input checked="" type="checkbox"/> |
| Project | Public Read/Write | Private | <input checked="" type="checkbox"/> |

Other Settings

Standard Report Visibility [i](#) Manual User Record Sharing [i](#) Manager Groups [i](#)

Secure guest user record access [i](#) Require permission to view record names in lookup fields [i](#)

[i](#)

[Save](#) [Cancel](#)

Sharing Settings

| | | | |
|--------------------|-------------------|---------|-------------------------------------|
| Waitlist | Private | Private | <input checked="" type="checkbox"/> |
| Web Cart Document | Private | Private | <input checked="" type="checkbox"/> |
| Work Order | Private | Private | <input checked="" type="checkbox"/> |
| Work Plan | Private | Private | <input checked="" type="checkbox"/> |
| Work Plan Template | Private | Private | <input checked="" type="checkbox"/> |
| Work Step Template | Private | Private | <input checked="" type="checkbox"/> |
| Work Type | Private | Private | <input checked="" type="checkbox"/> |
| Work Type Group | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Asset | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Asset Service | Private | Private | <input checked="" type="checkbox"/> |
| Employee | Private | Private | <input checked="" type="checkbox"/> |
| Project | Private | Private | <input checked="" type="checkbox"/> |

Other Settings

Standard Report Visibility [i](#) Manual User Record Sharing [i](#) Manager Groups [i](#)

Secure guest user record [i](#) Require permission to view record names in lookup [i](#)

7. User Adoption

- Create a Record (Employee)
- View a Record (Employee)
- Delete a Record (Employee)

Sales Home Opportunities

Employees Recently Viewed

1 item • Updated a few seconds ago

- Employee ID
 - 1 EMS-0001

New Employee

* = Required Information

Information

| | |
|---------------|---------------|
| Employee ID | Owner |
| | Alisha Shinaz |
| Employee Name | |
| Harshitaa G A | |
| Date of Birth | |
| 14/11/2003 | |
| Gender | |
| Female | |

Reports to:

Search Employees... Cancel Save & New Save

To Do List

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Employees More

Employee EMS-0001

New Contact Edit New Opportunity

Related Details

| | |
|---------------|---------------|
| Employee ID | Owner |
| EMS-0001 | Alisha Shinaz |
| Employee Name | |
| Harshitaa G A | |
| Date of Birth | |
| 14/11/2003 | |
| Age | |
| 21.00 | |
| Gender | |
| Female | |
| Reports to | |

To Do List

- ← → ⌂ psginstituteoftechnology-f2-dev-ed.lightning.force.com/lightning/o/Employee_c/list?filterName=_Recent
- Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Employees More
- Employees Recently Viewed
- 2 items • Updated a few seconds ago
- Employee ID
 - 1 EMS-0002
 - 2 EMS-0001
- New Import Change Owner Assign Label
- Search this list...
- Edit Delete Change Owner Edit Labels
- javascript:void(0);

8. Import Data

- Importing data using Data Wizard.

The screenshot shows a Microsoft Excel spreadsheet titled "Employee_CS1". The data consists of six rows of employee information:

| | Employee Name | Date of Birth | Age | Gender | Qualification | Address | Phone no | Email |
|---|---------------|---------------|-----|--------|---------------|------------|------------|---------------------|
| 1 | Alisha | 15/10/2003 | 21 | Female | B.E CSE | Coimbatore | 9933221134 | alishaa@gmail.com |
| 2 | Thanisha | 13/12/2002 | 22 | Female | B.E CSE | Chennai | 9873421736 | thanisha@gmail.com |
| 3 | Shrishti | 23/11/2001 | 23 | Female | B.E CSE | Coimbatore | 9875637281 | shrishti@gmail.com |
| 4 | Lakshana | 24/11/2004 | 20 | Female | B.E CSE | Chennai | 9764256783 | lakshana@gmail.com |
| 5 | Harshitaa | 14/11/2002 | 22 | Female | B.E CSE | Coimbatore | 9863678234 | harshitaa@gmail.com |

The screenshot shows the "Choose data" step of the Salesforce Data Management Data Importer. The "Employees" object is selected. The configuration includes:

- Match by: None
- Which User field in your file designates record owners?: None
- Which Employee field in your file do you want to match against to set the Reports to lookup field?: None
- Trigger workflow rules and processes?: Trigger workflow rules and processes for new and updated records
- File: Employee_CS1.csv
- Character Code: ISO-8859-1 (General US & Western European, ISO-LATIN-1)
- Values Separated By: Comma

Progress: Getting closer... (Step 1 of 3)

The screenshot shows the "Edit mapping" step of the Salesforce Data Management Data Importer. The table maps CSV headers to Salesforce fields:

| Edit | Mapped Salesforce Object | CSV Header | Example | Example | Example |
|--------|--------------------------|---------------|------------|------------|------------|
| Change | Employee Name | Employee Name | Alisha | Thanisha | Shrishti |
| Change | Date of Birth | Date of Birth | 15/10/2003 | 13/12/2002 | 23/11/2001 |
| Change | Gender | Gender | Female | Female | Female |
| Change | Qualification | Qualification | B.E CSE | B.E CSE | B.E CSE |
| Change | Address | Address | Coimbatore | Chennai | Coimbatore |
| Change | Phone no | Phone no | 9933221134 | 9873421736 | 9875637281 |

Progress: Almost done (Step 2 of 3)

psginstituteoftechnology-f2-dev-ed.lightning.force.com/lightning/setup/DataManagementDataImporter/home

Setup Home Object Manager

Choose data Edit mapping Start import

Review & Start Import

Great job

Help for this page ?

Your selections:

- Employees ✓
- Add new records ✓
- Employee_CS1.csv ✓

Your import will include:

Mapped fields 7

Unmapped fields 0

Cancel Previous Start Import

psginstituteoftechnology-f2-dev-ed.lightning.force.com/lightning/setup/DataManagementDataImporter/home

Setup Home Object Manager

Choose data Edit mapping Start import

Review & Start Import

Congratulations, your import has started!

Click OK to view your import status on the Bulk Data Load Job page.

OK

Help for this page ?

Your selections:

- Employees ✓
- Add new records ✓
- Employee_CS1.csv ✓

Your import will include:

Mapped fields 7

Unmapped fields 0

Cancel Previous Start Import

SETUP Bulk Data Load Jobs

Time to Complete 00:00 (hh:mm:ss)

Object Employee

External ID Field

Content Type CSV

Concurrency Mode Parallel

API Version 62.0

Completed Batches 1

Failed Batches 0

Progress 100%

Records Processed 5

Records Failed 0

Retries 0

Reload

Batches

| View Request | View Result | Batch ID | Start Time | End Time | Total Processing Time (ms) | API Active Processing Time (ms) | Apex Processing Time (ms) | Records Processed | Records Failed | Retry Count | State Message | Status |
|--------------|-------------|-----------------|----------------------|----------------------|----------------------------|---------------------------------|---------------------------|-------------------|----------------|-------------|---------------|--------|
| View Request | View Result | 751dM000004wpxV | 14/10/2024, 10:42 pm | 14/10/2024, 10:42 pm | 83 | 34 | 0 | 5 | 0 | 0 | Complete | |

9. Profiles

- HR Profile
- Manager Profile
- Create Employee Profile

The screenshot shows the Salesforce Setup - Profiles page. The left sidebar has a search bar and navigation links for Home and Object Manager. The main content area is titled "Profiles". It displays "Custom Object Permissions" for various objects:

| Object | Basic Access | | | | | Data Administration | |
|----------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--|
| | Read | Create | Edit | Delete | View All | Modify All | |
| Assets | <input checked="" type="checkbox"/> | |
| Asset Services | <input checked="" type="checkbox"/> | |
| Employees | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Projects | <input type="checkbox"/> | |
| Project Tasks | <input type="checkbox"/> | |

Below the permissions, there are sections for "Session Settings" and "Password Policies".

The screenshot shows the Salesforce Setup - Profiles page. The left sidebar has a search bar and navigation links for Home and Object Manager. The main content area is titled "Profiles". It displays "Contact Point Consents" and "Streaming Channels" sections, followed by "Custom Object Permissions" for various objects:

| Object | Basic Access | | | | | Data Administration | |
|----------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--|
| | Read | Create | Edit | Delete | View All | Modify All | |
| Assets | <input type="checkbox"/> | |
| Asset Services | <input type="checkbox"/> | |
| Employees | <input checked="" type="checkbox"/> | |
| Projects | <input checked="" type="checkbox"/> | |
| Project Tasks | <input checked="" type="checkbox"/> | |

Below the permissions, there are sections for "Session Settings" and "Password Policies".

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar shows 'Users' and 'Profiles' selected. The main content area displays 'Custom Object Permissions' for several objects. For Assets, Asset Services, and Employees, there are sections for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). For Projects and Project Tasks, similar permissions are listed. Below this, 'Session Settings' and 'Password Policies' are shown.

10. Roles

- Creating HR Role
- Creating Various Roles

The screenshot shows the Salesforce Setup interface with the 'Roles' page open. The left sidebar shows 'Users' and 'Roles' selected. The main content area displays the 'Role Detail' for the 'HR' role. It includes fields for 'Label' (HR), 'Reports To' (CEO), 'Modified By' (Alisha Shinaz), 'Opportunity Access', and 'Case Access'. A list of users assigned to this role is shown below, along with a note about creating new users.

The screenshot shows the Salesforce Setup interface with the 'Roles' page open, specifically the 'New Role' creation screen. The left sidebar shows 'Users' and 'Roles' selected. The main content area displays a 'Role Edit' form for creating a new role. Fields include 'Label' (Manager), 'Role Name' (Manager), 'This role reports to' (CEO), and 'Role Name as displayed on reports'. Buttons at the bottom include 'Save', 'Save & New', and 'Cancel'.

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes sections for "Users" (with "Roles" selected), "Feature Settings", "Sales" (with "Contact Roles on Contracts" and "Contact Roles on Opportunities"), "Service" (with "Case Teams" and "Case Team Roles"), and "Cases" (with "Contact Roles on Cases"). A search bar at the top says "Search Setup". The main content area is titled "SETUP Roles" and shows a "New Role" form. The "Role Edit" section contains fields for "Label" (Remote Employee), "Role Name" (Remote_Employee), and "This role reports to" (Manager). There is also a field for "Role Name as displayed on reports". At the bottom of the form are "Save", "Save & New", and "Cancel" buttons. A help link "Help for this Page" is in the top right corner.

This screenshot is identical to the one above, showing the creation of a new role named "Remote Employee". The setup interface, sidebar, and main content area with the "New Role" form are all the same.

Role
Remote Employee

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: PSG Institute of Technology and Applied Research » CEO » Manager » Remote Employee
Siblings: On Site Employee

| Role Name | Role Name as displayed on reports |
|-----------------|--------------------------------------|
| Remote Employee | Role, Role and Internal Subordinates |

11. USERS

- Creating various users.

General Information

| | | | |
|------------|------------------|---------------------------|-------------------------------------|
| First Name | Niklaus | Role | HR |
| Last Name | Mikaelson | User License | Salesforce |
| Alias | nick | Profile | HR |
| Email | nick12@gmail.com | Active | <input checked="" type="checkbox"/> |
| Username | nick12@gmail.com | Marketing User | <input type="checkbox"/> |
| Nickname | nicko | Offline User | <input type="checkbox"/> |
| Title | | Knowledge User | <input type="checkbox"/> |
| Company | | Flow User | <input type="checkbox"/> |
| Department | | Service Cloud User | <input type="checkbox"/> |
| Division | | Site.com Contributor User | <input type="checkbox"/> |

User
Niklaus Mikaelson

Permission Set Assignments [0] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [0] | Third-Party Account Links [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [0] | User Provisioning Accounts [0]

User Detail

| Name | Niklaus Mikaelson | Role | HR |
|------------|--------------------------|---------------------------|-------------------------------------|
| Alias | nick | User License | Salesforce |
| Email | ali12@gmail.com [Verify] | Profile | HR |
| Username | nic12@mnc.com | Active | <input checked="" type="checkbox"/> |
| Nickname | nicko | 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 | | Site.com Contributor User | <input type="checkbox"/> |

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Users' and includes options like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a selected 'Users' option. Under 'Users', there are sub-options for Feature Settings, Data.com, and Prospector Users. The main content area is titled 'SETUP Users' and shows the 'User Detail' page for 'Kol Mikaelson'. The user's name is displayed at the top. Below it is a table with columns for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, and Address. To the right of the table, there are sections for Role (Manager), User License (Salesforce Platform), Profile (Manager), and various status checkboxes (Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User). A 'Help for this Page' link is located at the top right of the content area.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the previous one, with the 'Users' option selected under 'Users'. The main content area is titled 'SETUP Users' and shows the 'New User' creation page. The page has a 'User Edit' header with 'Save', 'Save & New', and 'Cancel' buttons. Below this is a section titled 'General Information' with a note '! = Required Information'. The form contains fields for First Name (Harry), Last Name (Potter), Alias (hpott), Email (ali123@gmail.com), Username (hp@hog.com), Nickname (theboywholived), Title (empty), Company (empty), Department (empty), Division (empty), Role (Manager), User License (Salesforce Platform), Profile (Manager), and Active status (checked). There are also checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, and Site.com Contributor User.

12. Page Layouts

- Creating a page layout for Employee object
- Creating another page layout

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER Employee

Create New Page Layout

Help for this Page ?

As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.

Existing Page Layout: --None--

Page Layout Name: On Site Employee Layout

Save Cancel

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER Employee

Fields Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists
- Report Charts

| Section | Cab Allowance | Email | Food Allowance Am... | Last Modified By | Mode of Work | Reports to |
|-------------|----------------------|---------------|----------------------|------------------|---------------|---------------|
| Blank Space | Cab Allowance Amount | Employee ID | Food Allowances | LinkedIn Profile | Owner | Wifi Allow... |
| Address | Created By | Employee Name | Gender | Login Time | Phone no | Wifi Allow... |
| Age | Date of Birth | Experience | Joining date | Logout Time | Qualification | |

Allowances

Cab Allowance ✓ Cab Allowance Amount ₹123.45

Food Allowances ✓ Food Allowance Amount ₹123.45

Personal Information

Address Sample Text Date of Birth 15/10/2024 Age 240.40

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists

Custom Buttons

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER Employee

Fields Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists

| Cab Allowance | Email | Food Allowance Am... | Last Modified By | Mode of Work | Reports to |
|----------------------|---------------|----------------------|------------------|---------------|---------------|
| Cab Allowance Amount | Employee ID | Food Allowances | LinkedIn Profile | Owner | Wifi Allow... |
| Created By | Employee Name | Gender | Login Time | Phone no | Wifi Allow... |
| Date of Birth | Experience | Joining date | Logout Time | Qualification | |

Allowances

Wifi Allowances ✓ Wifi Allowance Amount ✓

Personal Information

Date of Birth 15/10/2024 Address Sample Text Age 240.40

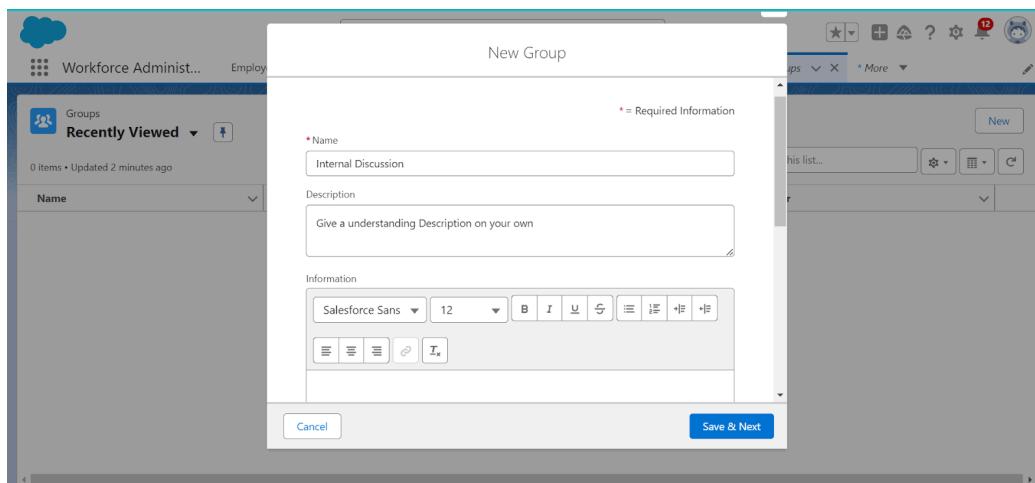
Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists

13. Chatter Groups

- Creating a chatter group for your organization.



A screenshot of the Salesforce Chatter feed for the 'Internal Discussion' group. The header shows the group name 'Internal Discussion' and its access level 'Private with Customers'. The feed interface includes tabs for 'Chatter' and 'Engagement'. A 'Post' button is highlighted. A text input field says 'Share an update...' with a 'Share' button next to it. Below this is a 'Sort by:' dropdown set to 'Most Recent Activity'. To the right is a 'Group Details' sidebar containing the group's description ('Give a understanding Description on your own'), group email ('0F9dM000000BLqjSAG@post.dmn3uh.ind136.chatter.salesforce.com'), and owner ('Alisha Shinaz').

14. Record Types

- Creating On Site Employee Record Type
- Creating "Remote Employee" Record type

Record Type
On Site 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 | | Active | ✓ |
|-------------------|------------------------------------|-------------|-------------------------------------|
| Record Type Label | On Site Employee | | |
| Record Type Name | On_Site_Employee | | |
| Namespace Prefix | | | |
| Description | | | |
| Created By | Alisha Shinaz, 15/10/2024, 9:08 pm | Modified By | Alisha Shinaz, 09/11/2024, 11:21 am |

Record Type
Remote Employee

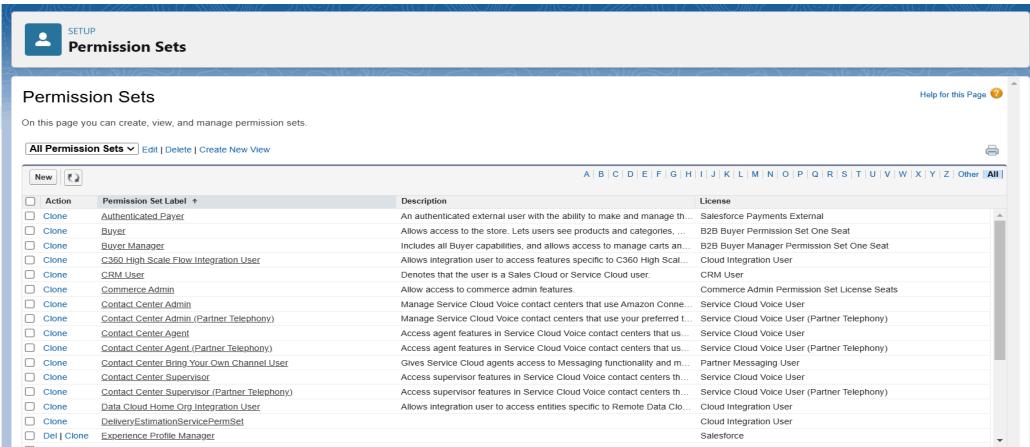
[« Back to Custom Object: Employee](#)

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 | | Active | ✓ |
|-------------------|------------------------------------|-------------|-------------------------------------|
| Record Type Label | Remote Employee | | |
| Record Type Name | Remote_Employee | | |
| Namespace Prefix | | | |
| Description | | | |
| Created By | Alisha Shinaz, 15/10/2024, 9:14 pm | Modified By | Alisha Shinaz, 09/11/2024, 11:23 am |

15. Permission sets

- Creating a permission set



The screenshot shows the Salesforce 'Permission Sets' page under the 'SETUP' tab. The left sidebar includes a global search bar and navigation sections for 'Users' (with 'Permission Set Groups' and 'Permission Sets' selected), 'Custom Code', and 'Custom Permissions'. A note at the bottom says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Permission Sets' and contains a table with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The table lists various permission sets such as 'Authenticated User', 'Buyer', 'Buyer Manager', 'C360 High Scale Flow Integration User', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Agent (Partner Telephony)', 'Contact Center Bring Your Own Channel User', 'Contact Center Supervisor', 'Contact Center Supervisor (Partner Telephony)', 'Data Cloud Home Org Integration User', 'DeliveryEstimationServicePermSet', 'Del | Clone', and 'Experience Profile Manager'. Each row includes a checkbox for 'Clone' and a link for 'Edit' or 'Delete'.

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

The screenshot shows the 'Permission Sets' page in Salesforce. The top navigation bar includes 'SETUP' and 'Permission Sets'. Below the header, the permission set name 'Per to Emp' is displayed, along with a search bar and buttons for 'Clone', 'Edit Properties', 'Manage Assignments', and 'View Summary'. The main content area is titled 'Permission Set Overview' and contains sections for 'Description' (with fields for 'License' and 'Session Activation Required'), 'API Name' (Per_to_Emp), 'Namespace Prefix', 'Created By' (Alisha Shinaz), and 'Last Modified By' (Alisha Shinaz). The 'Apps' section lists various settings: 'Assigned Apps' (Settings that specify which apps are visible in the app menu), 'Assigned Connected Apps' (Settings that specify which connected apps are visible in the app menu), 'Object Settings' (Permissions to access objects and fields, and settings such as tab availability), 'App Permissions' (Permissions to perform app-specific actions, such as "Manage Call Centers"), 'Apex Class Access' (Permissions to execute Apex classes), 'Visualforce Page Access' (Permissions to execute Visualforce pages), 'External Data Source Access' (Permissions to authenticate against external data sources), and 'Flow Access' (Settings that apply to Salesforce apps, such as Sales, and Flow Access).

The screenshot shows the 'Permission Sets' page with the 'Employees' object selected. The top navigation bar includes 'SETUP' and 'Permission Sets'. Below the header, the permission set name 'Per to Emp' is displayed, along with a search bar and buttons for 'Clone', 'Edit Properties', 'Manage Assignments', and 'View Summary'. The main content area shows the 'Employees' object settings under 'Object Settings'. It includes 'Tab Settings' (Available: checked, Visible: checked) and 'Employee: Record Type Assignments' (On Site Employee: checked, Remote Employee: unchecked). The 'Object Permissions' section lists permissions: Read (checked), Create (checked), Edit (unchecked), Delete (unchecked), View All (unchecked), and Modify All (unchecked).

16. Reports And Dashboards

- Create Report
- Create 2 more Report
- Create Dashboard

Create Report

| Category | Report Type Name | Category |
|----------------------------------|---------------------------|----------|
| Recently Used | Assets with Employee Name | Standard |
| All | Employees | Standard |
| Accounts & Contacts | | |
| Opportunities | | |
| Customer Support Reports | | |
| Leads | | |
| Campaigns | | |
| Activities | | |
| Contracts and Orders | | |
| Price Books, Products and Assets | | |
| Administrative Reports | | |
| File and Content Reports | | |
| Individuals | | |
| Other Reports | | |
| Hidden Report Types | | |

New Dashboard

* Name

Description

Folder

Private Dashboards

Workforce Administ...

Employees Projects Asset Services ProjectTasks Reports Dashboards Assets Leaves

Search recent dashboards... New Dashboard New Folder

| DASHBOARDS | Dashboard Name | Description | Folder | Created By | Created On | Subscribed |
|--------------------|----------------|-------------|--------------------|---------------|----------------------|------------|
| Recent | Dashboard 2 | | Private Dashboards | Alisha Shinaz | 16/10/2024, 12:01 am | |
| Created by Me | Dashboard 1 | | Private Dashboards | Alisha Shinaz | 15/10/2024, 11:58 pm | |
| Private Dashboards | | | | | | |
| All Dashboards | | | | | | |
| FOLDERS | | | | | | |
| All Folders | | | | | | |
| Created by Me | | | | | | |
| Shared with Me | | | | | | |
| FAVORITES | | | | | | |
| All Favorites | | | | | | |

17.Approval Process And Apex Trigger

- Leave Approval Request

- Create an Apex Trigger
- Testing The Trigger

The screenshot shows the Salesforce Setup interface with the following details:

Search Bar: Search Setup

Header: SETUP Approval Processes

Page Title: Leave: Leave Approval Request

Process Definition Detail:

- Process Name: Leave Approval Request
- Unique Name: Leave_Approval_Request
- Description: Next Automated Approver Determined By
- Entry Criteria: Record Editability: Administrator ONLY
- Approval Assignment Email Template: None
- Initial Submitters: Leave Owner
- Created By: Alisha Shinaz, 20/10/2024, 1:44 pm
- Modified By: Alisha Shinaz, 20/10/2024, 1:44 pm
- Allow Submitters to Recall Approval Requests:

Initial Submission Actions: Add Existing, Add New

The screenshot shows the Salesforce Setup interface with the following details:

Search Bar: Search Setup

Header: SETUP Field Updates

Page Title: field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit:

Identification:

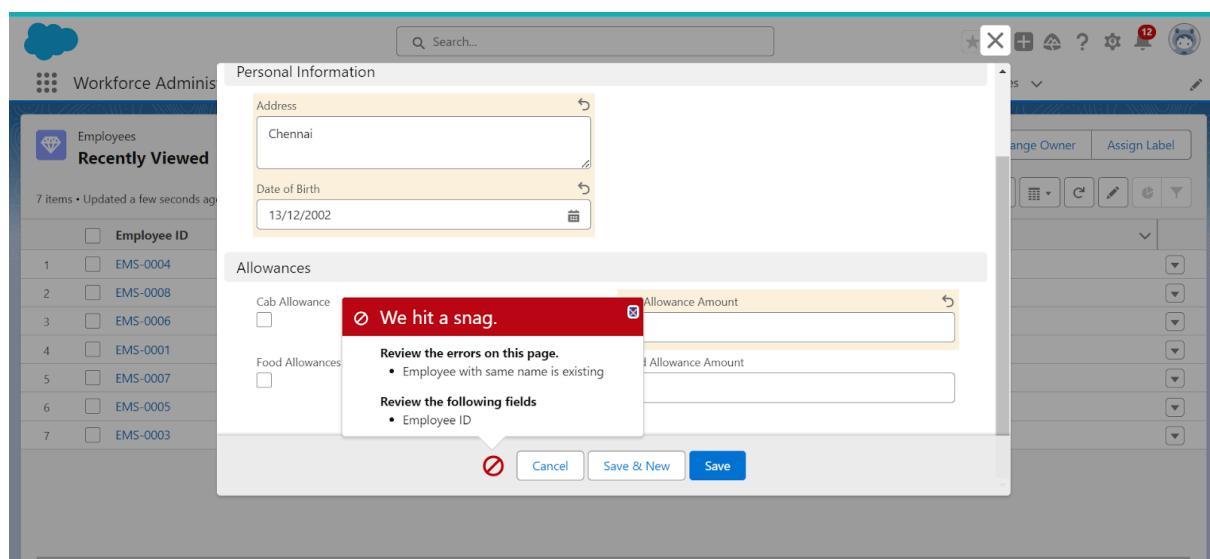
- Name: Approval Status to Submit
- Unique Name: Approval_Status_to_Submit
- Description: (empty)
- Object: Leave
- Field to Update: Leave: Status
- Field Data Type: Picklist
- Re-evaluate Workflow Rules after Field Change:

Specify New Field Value: Picklist Options

The screenshot shows the Salesforce IDE interface. The top menu includes File, Edit, Debug, Test, Workspace, Help, and a Go To button. A tabs bar at the top has 'EmpInsert.apxt' selected. Below it, the code editor displays the following Apex trigger:

```
1 trigger EmpInsert on Employee__c (before insert) {  
2     for(Employee__c pass : Trigger.New){  
3         List<Employee__c> mynew = [SELECT Id, Name FROM Employee__c WHERE Employee_Name__c =: pass.Employee_Name__c];  
4         if(mynew.size() > 0){  
5             pass.Name.addError('Employee with same name is existing');  
6         }  
7     }  
8 }  
9  
10 }
```

The code coverage is listed as 'None' with an API Version of 62. The bottom navigation bar includes Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The logs section is currently active.



5. Conclusion

The Workforce Administration Solution (Dev) has successfully established a modular and scalable workforce as well as asset management system using core Salesforce functionality. Highlights include:

- Structured Data — Implemented custom Objects, Tabs to Organise critical data around Employees, Projects, Tasks and Assets with fields.
- Lightning app for the user-friendly interface—Configured lightning app with customized page layout and navigation tabs improve the user experience as well as help users to achieve data entry and access.
- Restriction of data access with the help of OWD setting, profiles, and roles. Ensured that data security is not compromised and that it follows an organizational hierarchy.
- Automated Processes: Created Screen Flows, Apex triggers, approval workflows to automate the tasks and minimize manual entries leading to increased operational efficiency.
- Improved Collaboration: Using Chatter groups and permission sets, teams can communicate while ensuring flexible data access without losing security.
- Analytics: Created reports and dashboards for real-time tracking of workforce records, project visibility, and asset utilization to enable data-driven decisions.

The solution has delivered a scalable, user-friendly and secure workforce management system that empowers operations, enhances collaboration and provides actionable insights for strategic impact to the organization.