Workforce Administration Solution (Dev)

College: 7155 - PSG Institute of Technology and Applied Research

Team ID: NM2024TMID00582

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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

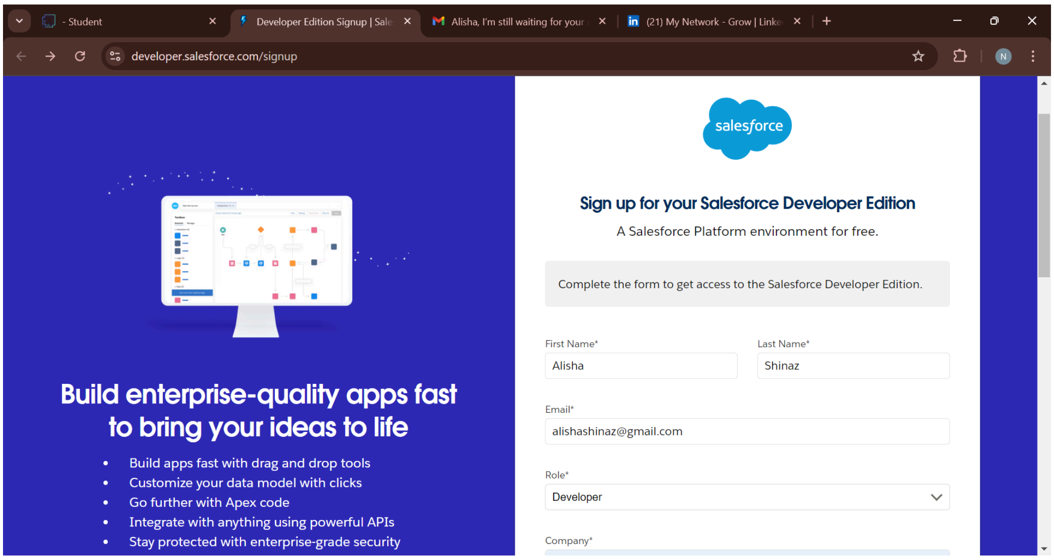
    - User Profiles: Defined profiles (e.g., HR, Project Manager, Employee) to control access to objects, fields, and features based on user roles and responsibilities.
- Role
    - Role Hierarchy: Set up a role hierarchy to define data visibility and reporting structure, ensuring managers can access subordinate 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

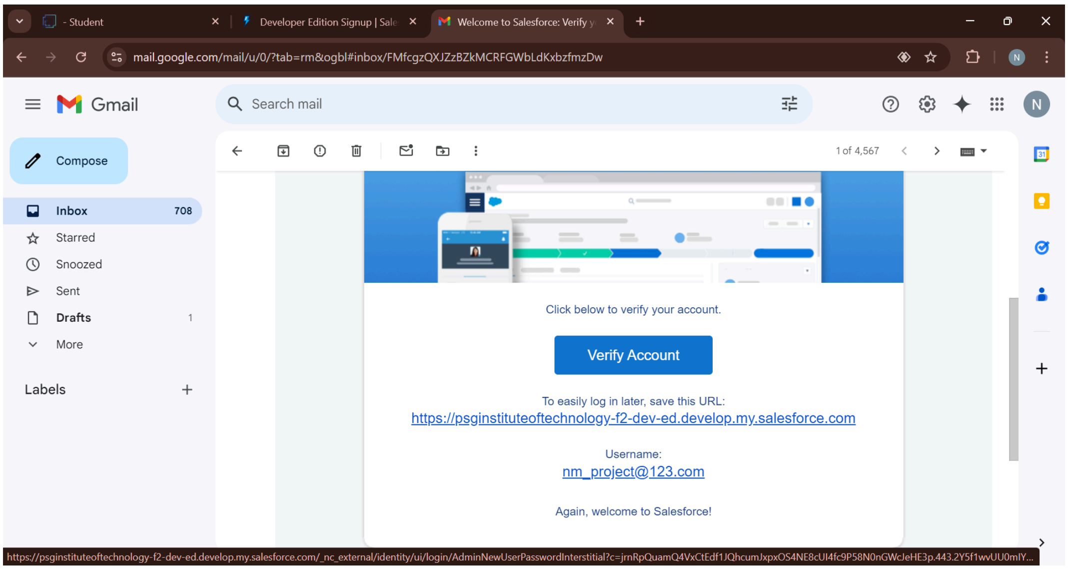
    - Workforce Dashboard: Created a comprehensive dashboard displaying metrics such as resource allocation, project status, and asset distribution for management visibility.
- Approval Process
    - Approval Workflow for Asset Requests: Set up an approval process for employees to request assets, which requires **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

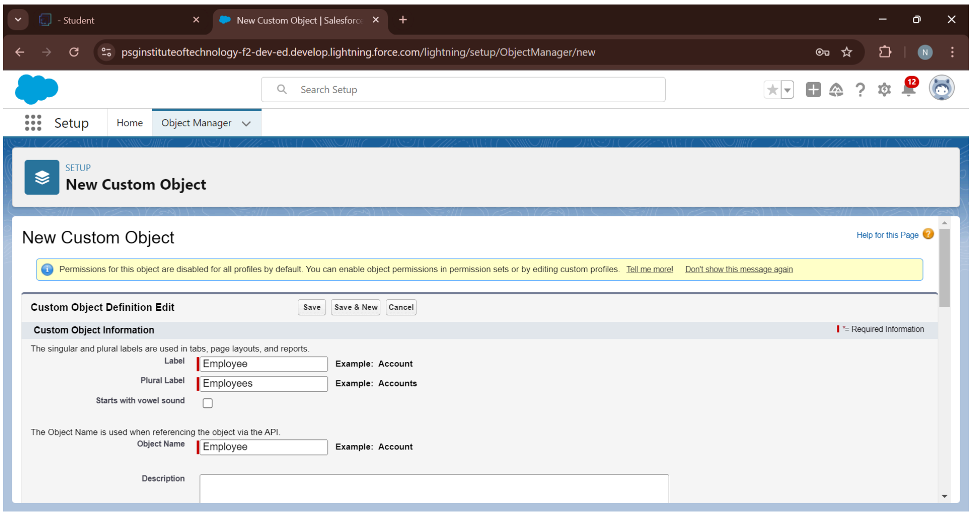
- We began by creating a Salesforce Developer Account to access a development environment where we could build and customize the application. This setup provided the necessary tools to design, test, and deploy the application.

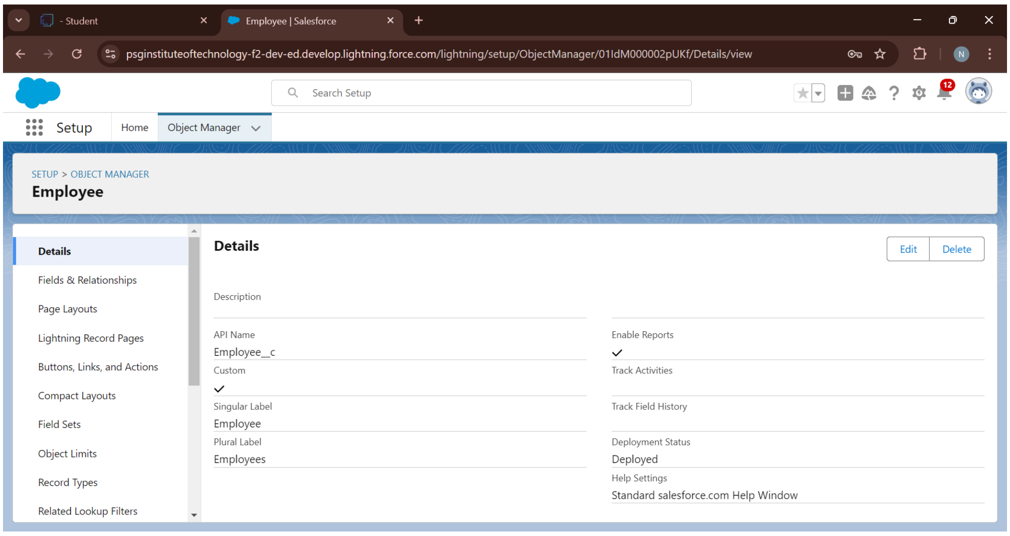




2. Defined Objects

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

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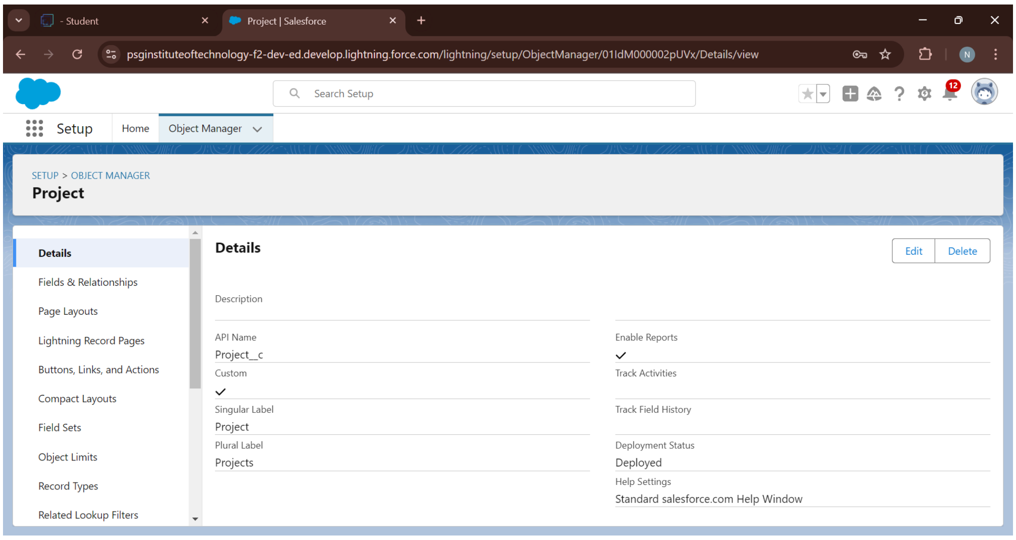
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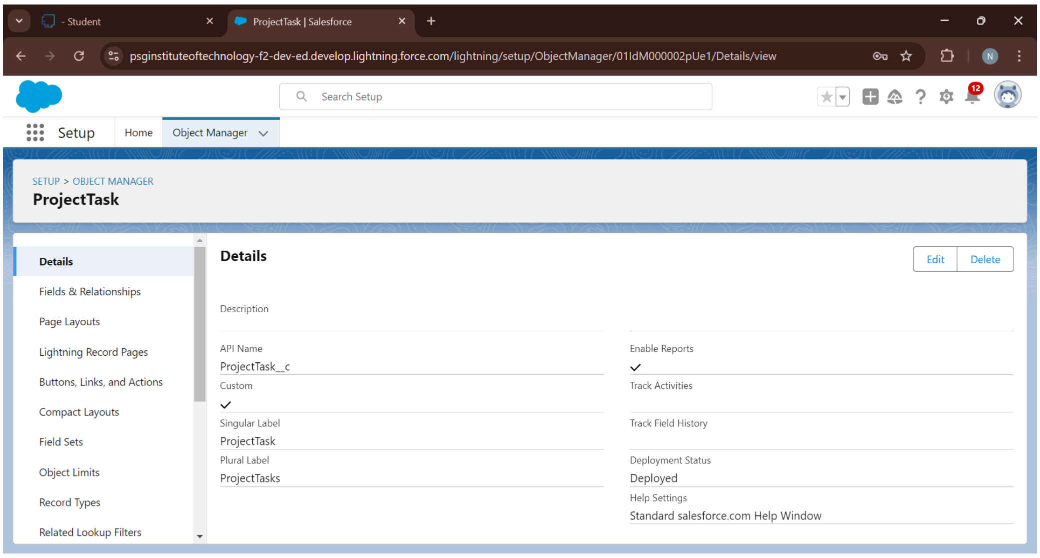
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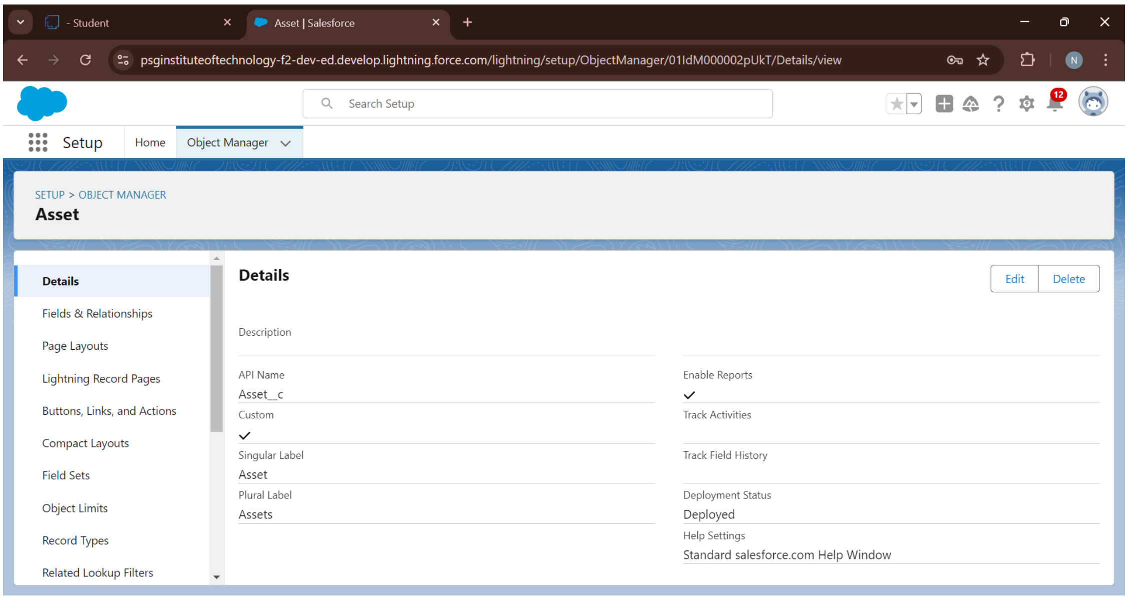
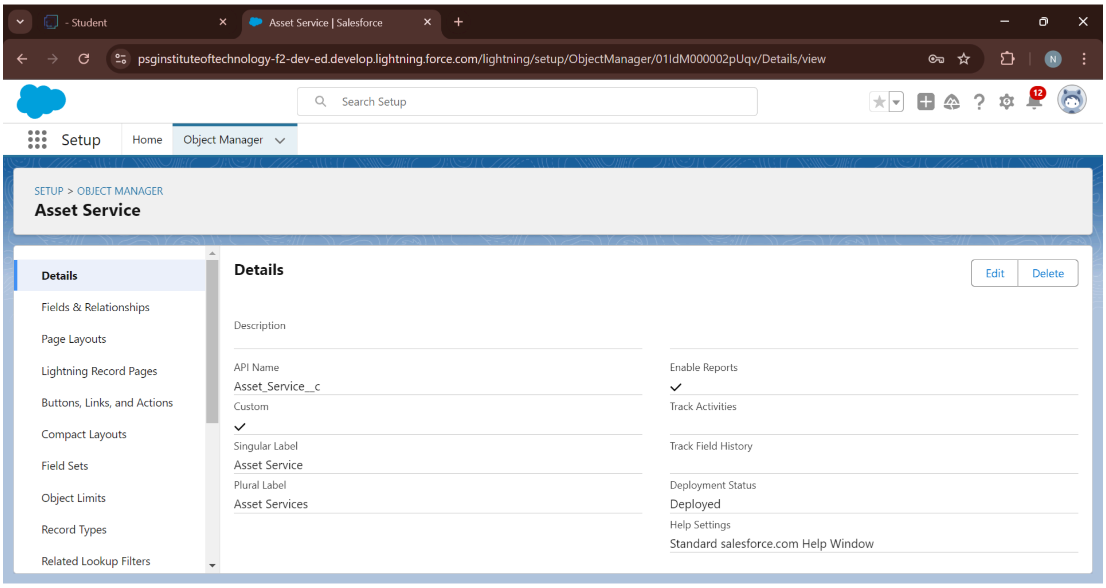
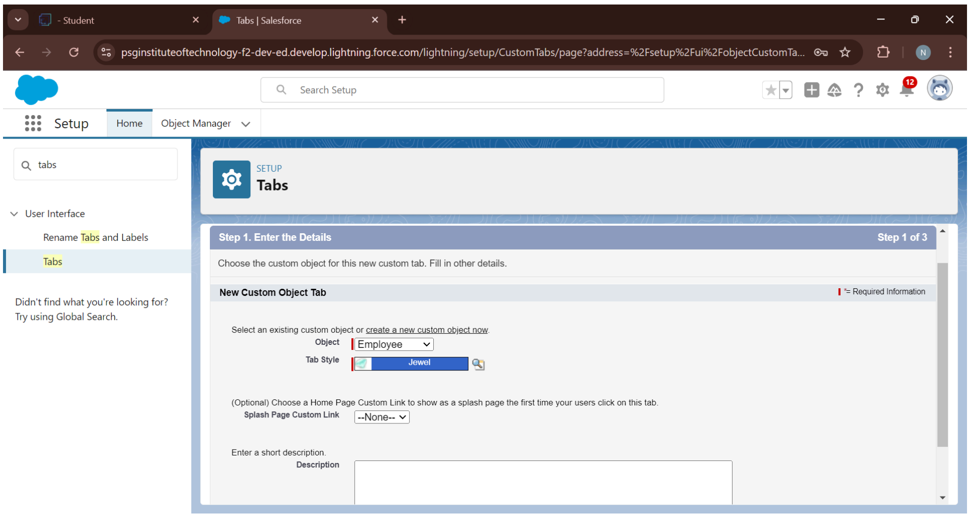




3. Configured Tabs

- 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.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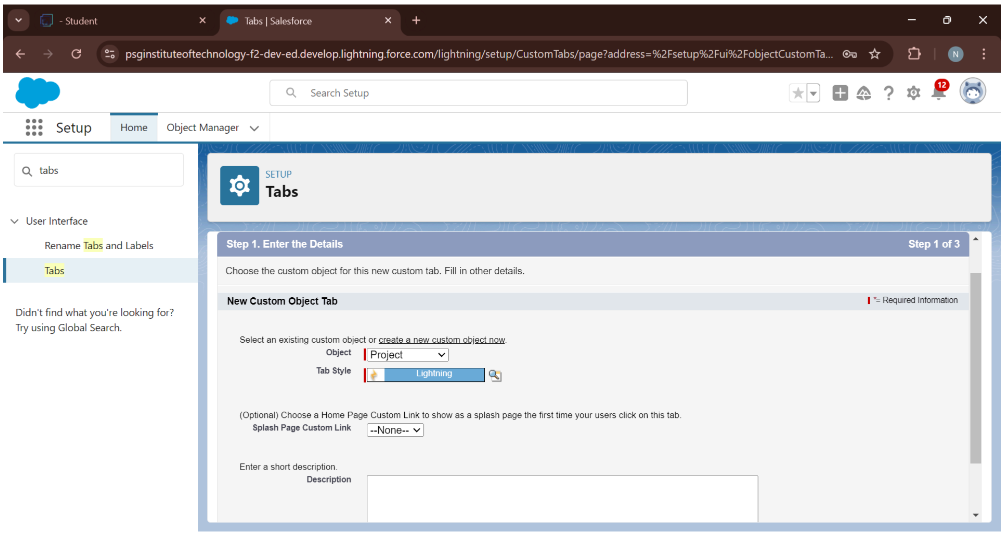
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
New Custom Object Tab
= Required Information
Select an existing custom object or create a new custom object now.
Object
Employee
Tab Style
Jewel
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description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Step 1. Enter the Details
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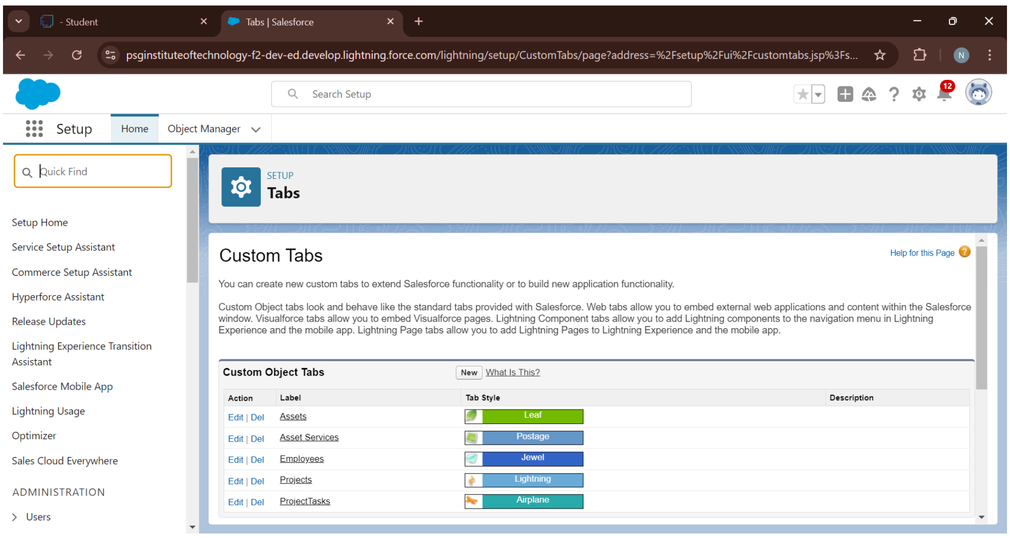
Choose the custom object for this new custom tab. Fill in other details.
New Custom Object Tab
= Required Information
Select an existing custom object or create a new custom object now.
Object
Project
Tab Style
Lightning
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description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Quick Find
Setup Home
Service Setup Assistant
Commerce Setup Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.
Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
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Employees
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Projects
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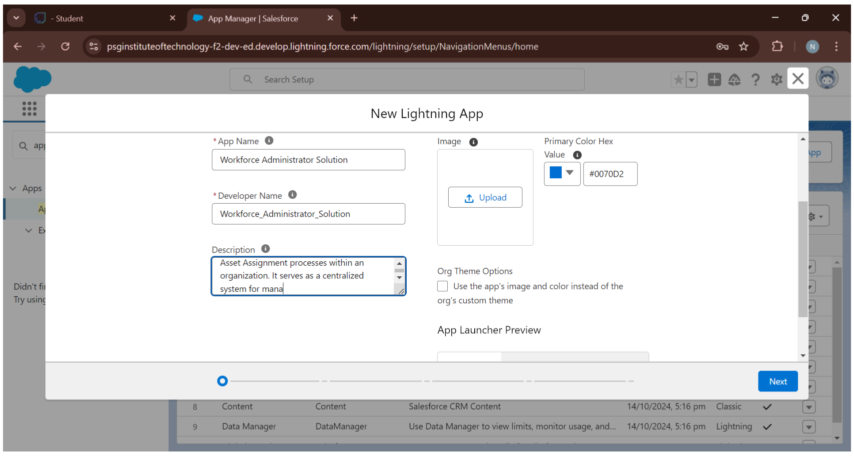
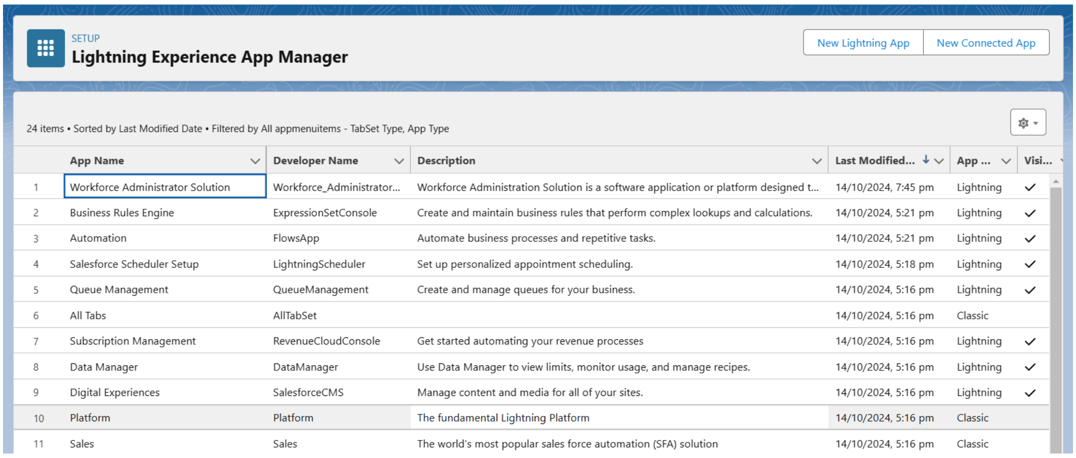
ProjectTasks
Airplane

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.





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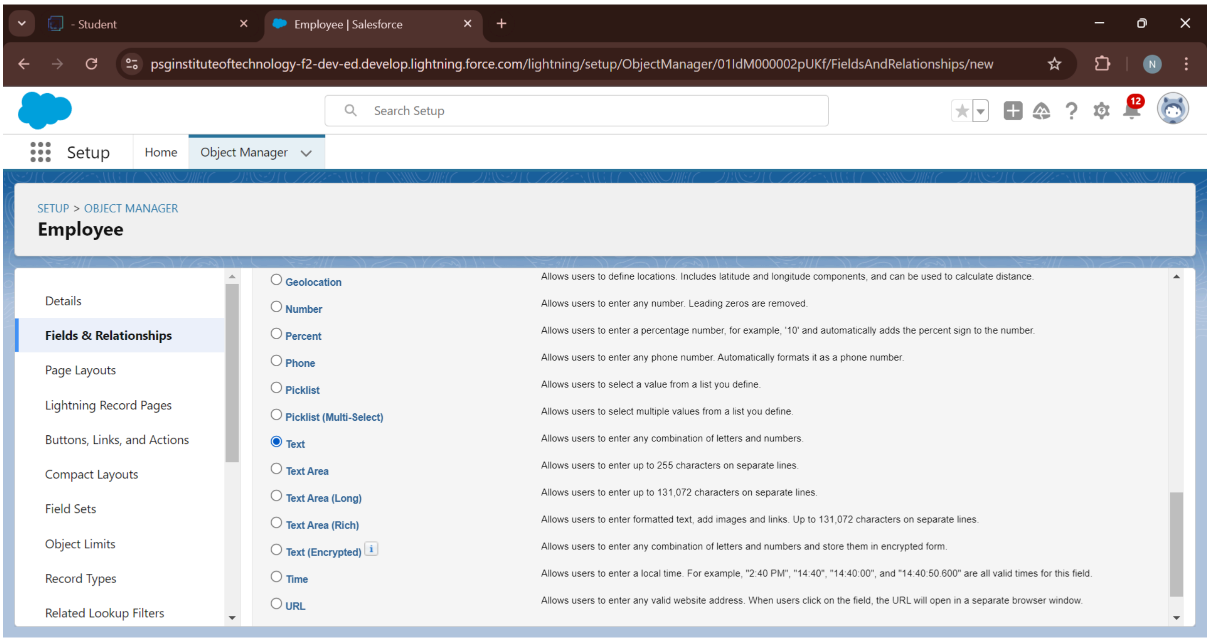
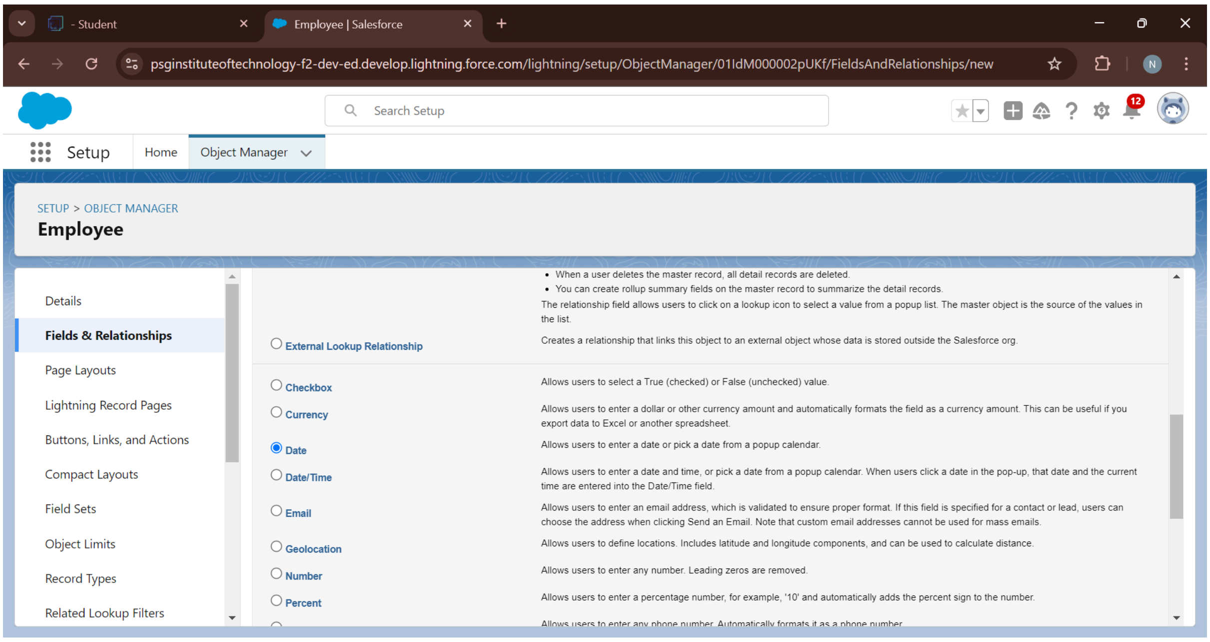
1	Workforce Administrator Solution	Workforce_Administrator...	Workforce Administration Solution is a software application or platform designed t...	14/10/2024, 7:45 pm	Lightning	✓
2	Business Rules Engine	ExpressionSetConsole	Create and maintain business rules that perform complex lookups and calculations.	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	

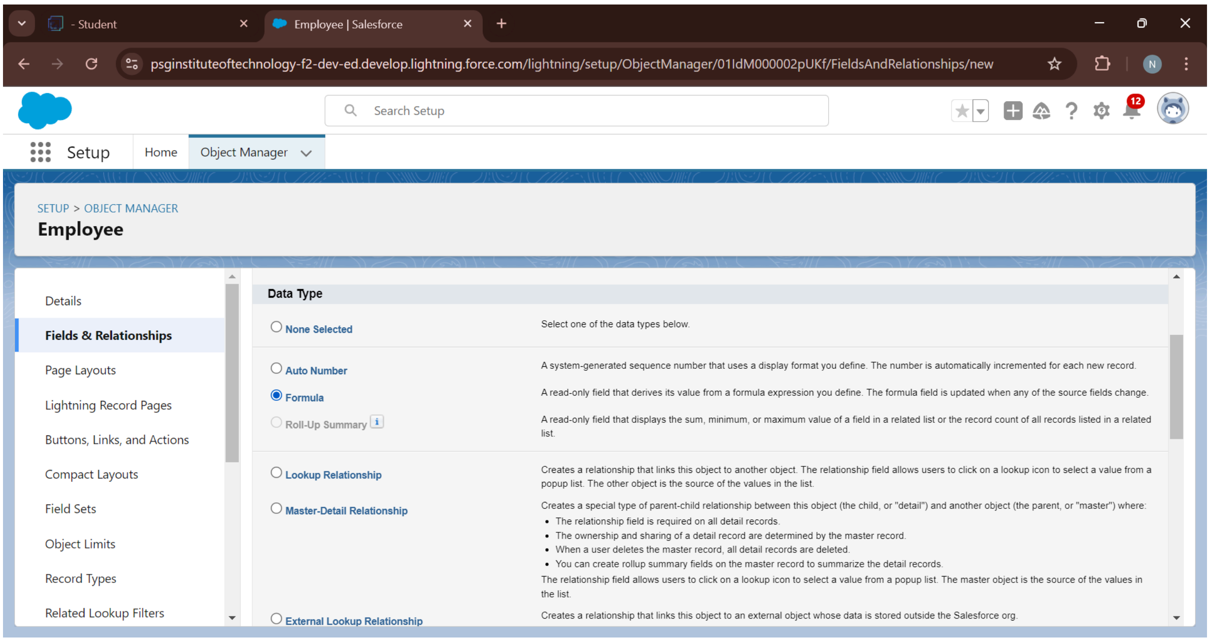
5. Added Fields to Objects

- 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



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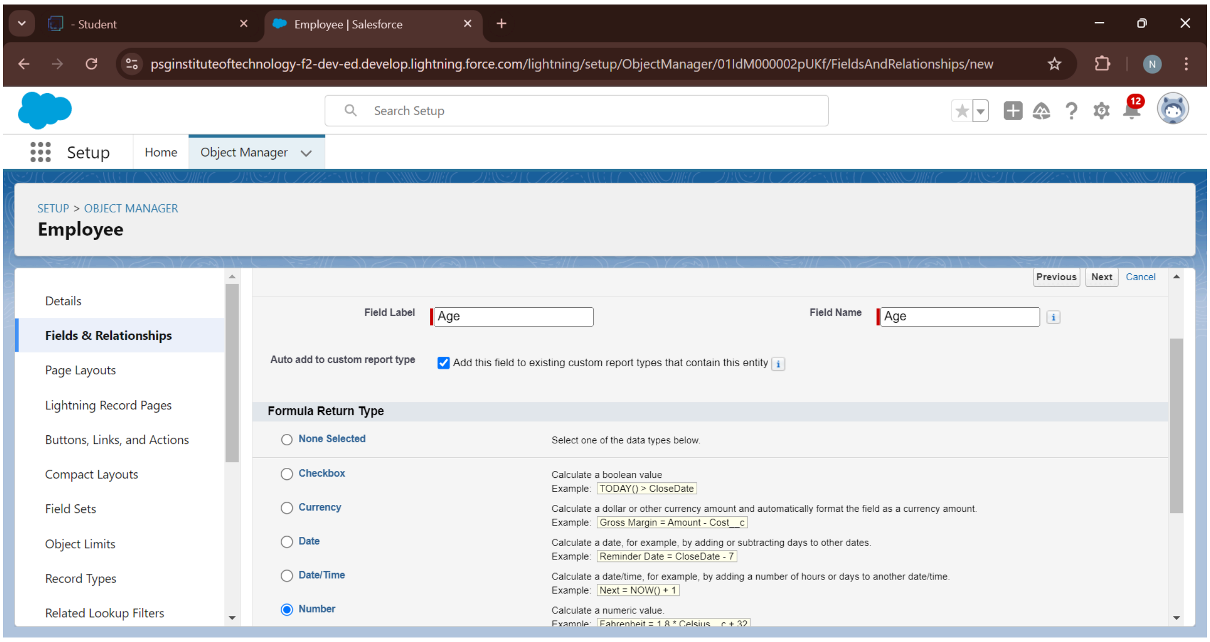
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
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.
Roll-Up Summary
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.
Lookup Relationship
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.
Master-Detail Relationship
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.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.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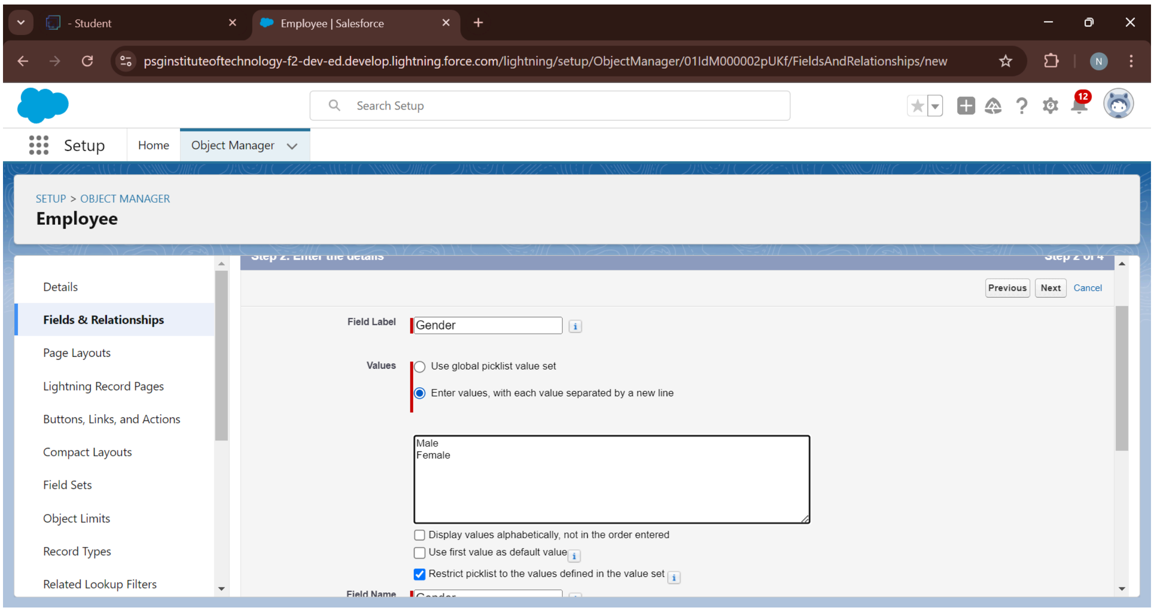
Field Sets
Object Limits
Record Types
Related Lookup Filters
Previous
Next
Cancel
Field Label
Age
Field Name
Age
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Formula Return Type
None Selected
Select one of the data types below.
Checkbox
Calculate a boolean value
Example: TODAY() > CloseDate
Currency
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: Gross Margin = Amount - Cost__c
Date
Calculate a date, for example, by adding or subtracting days to other dates.
Example: Reminder Date = CloseDate - 7
Date/Time
Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: Next = NOW() + 1
Number
Calculate a numeric value.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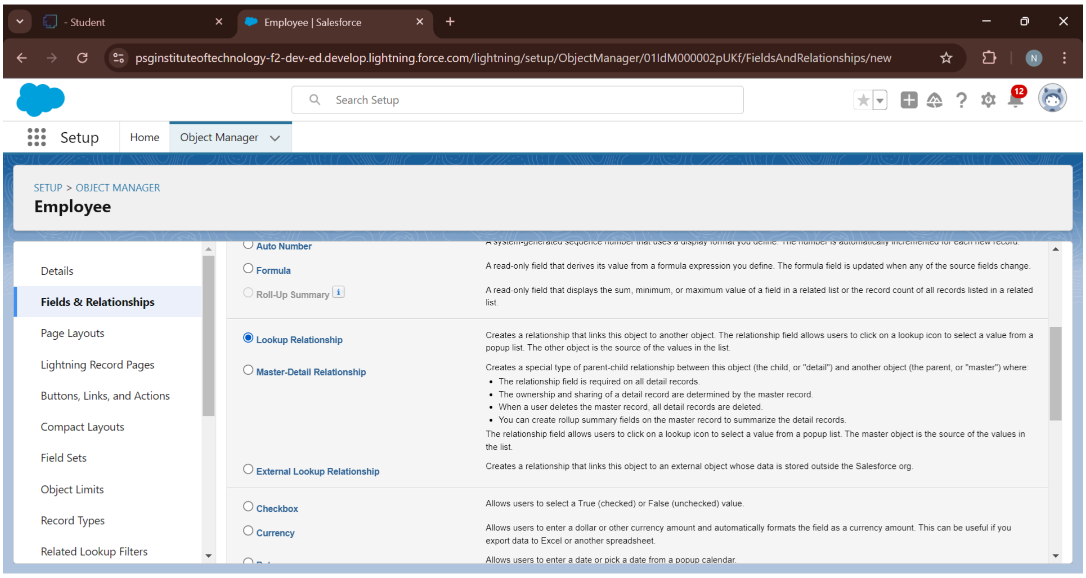
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Previous
Next
Cancel
Field Label
Gender
Values
Use global picklist value set
Enter values, with each value separated by a new line
Male
Female
Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set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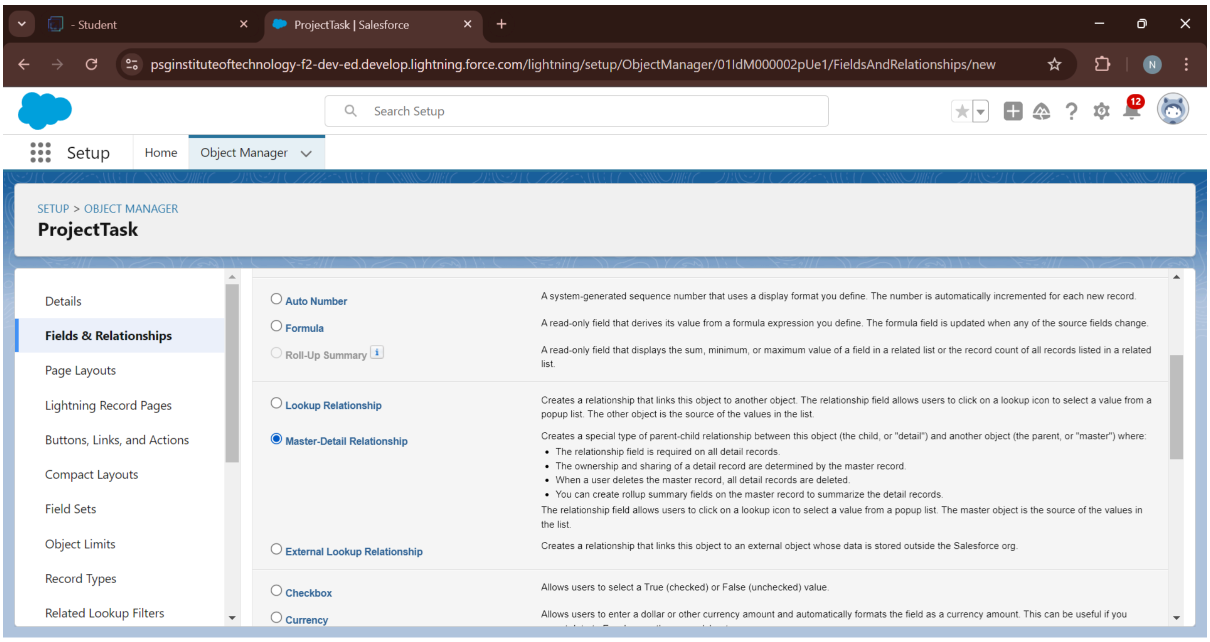
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Allows users to enter a date or pick a date from a popup calendar.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Currency
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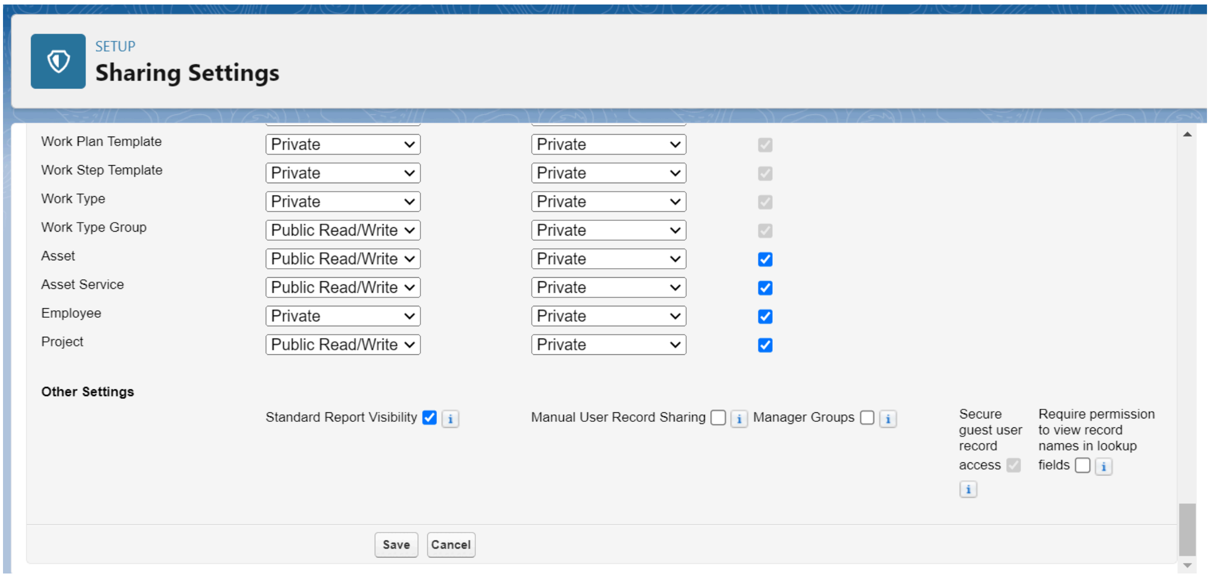
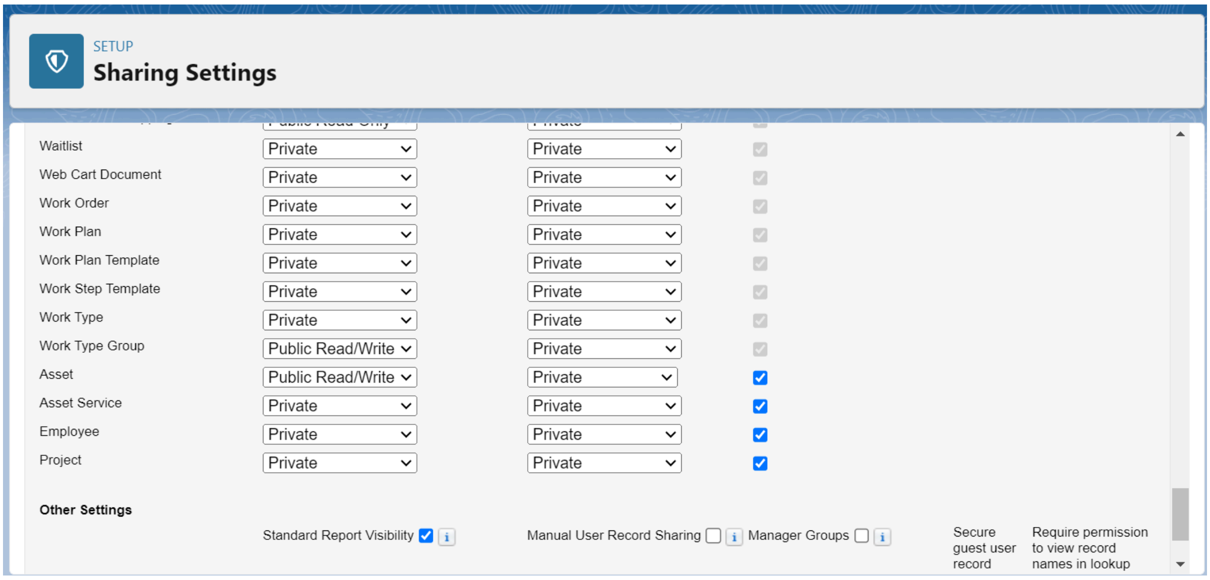
6. Setting OWD

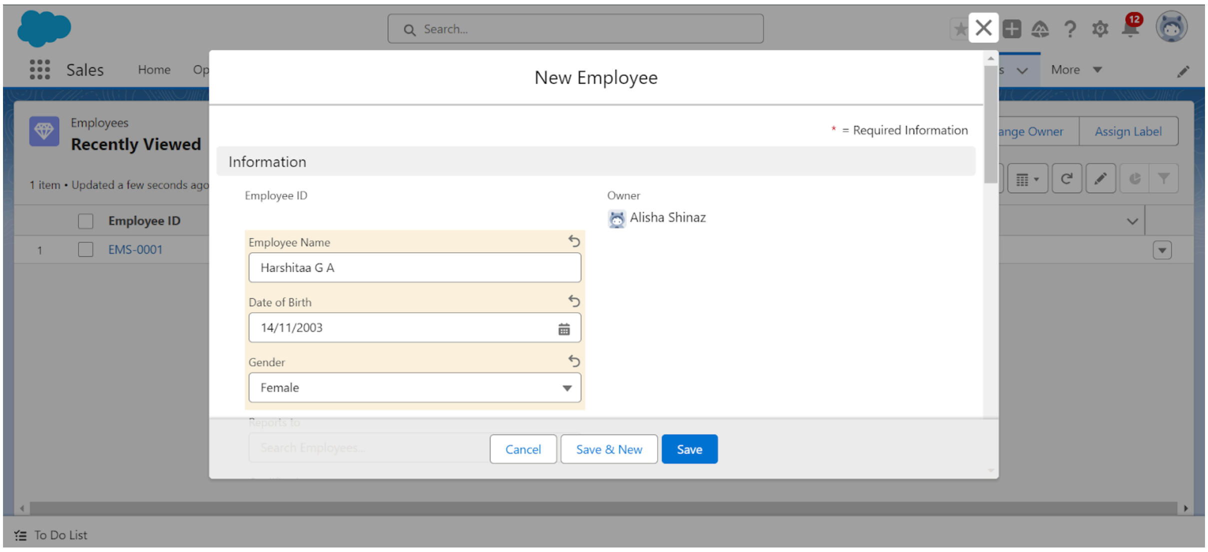
- Create OWD Setting
- Set OWD as Private for Project and Asset Service objects

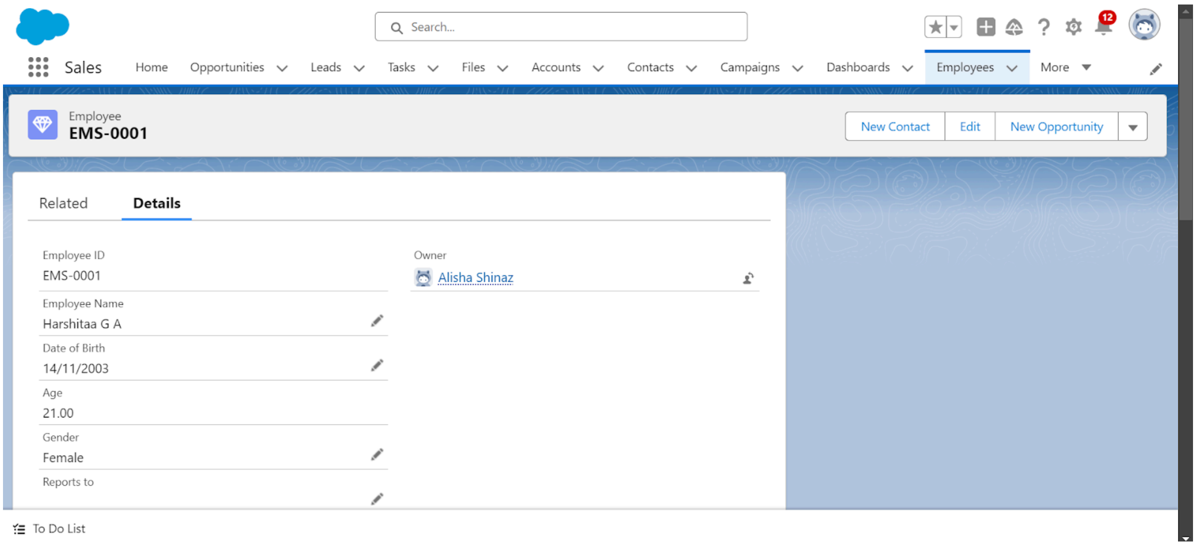


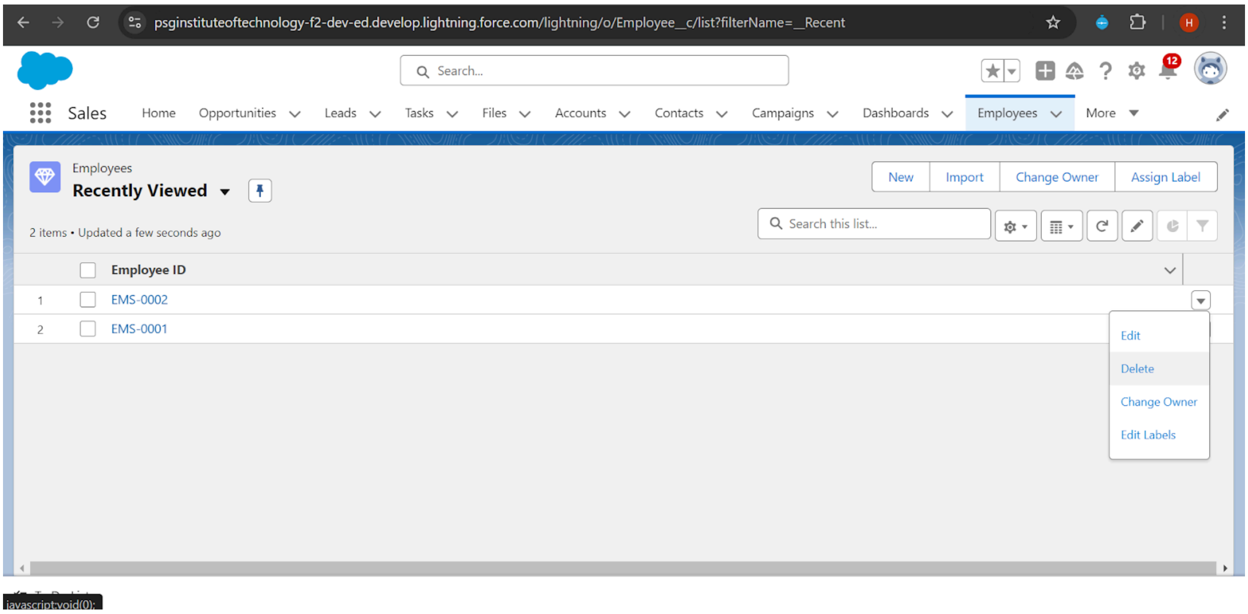


7. User Adoption

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

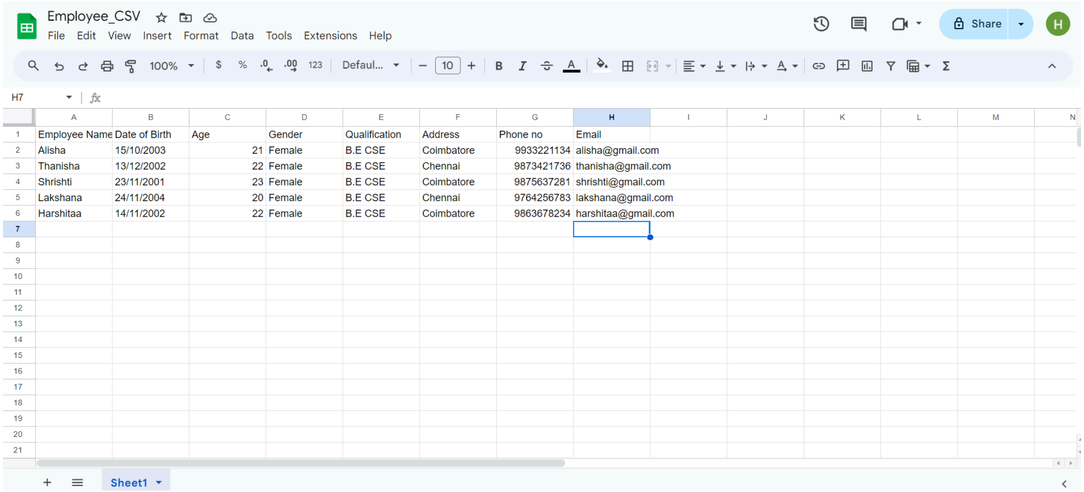

Sales
Home
New Employee
* = Required Information
Information
Employee ID
Owner
Alisha Shinaz
Employee Name
Harshitaa G A
Date of Birth
14/11/2003
Gender
Female
Cancel
Save & New
Save
Employees
Recently Viewed
1 item • Updated a few seconds ago
Employee ID
EMS-0001
More
Assign Label
To Do List

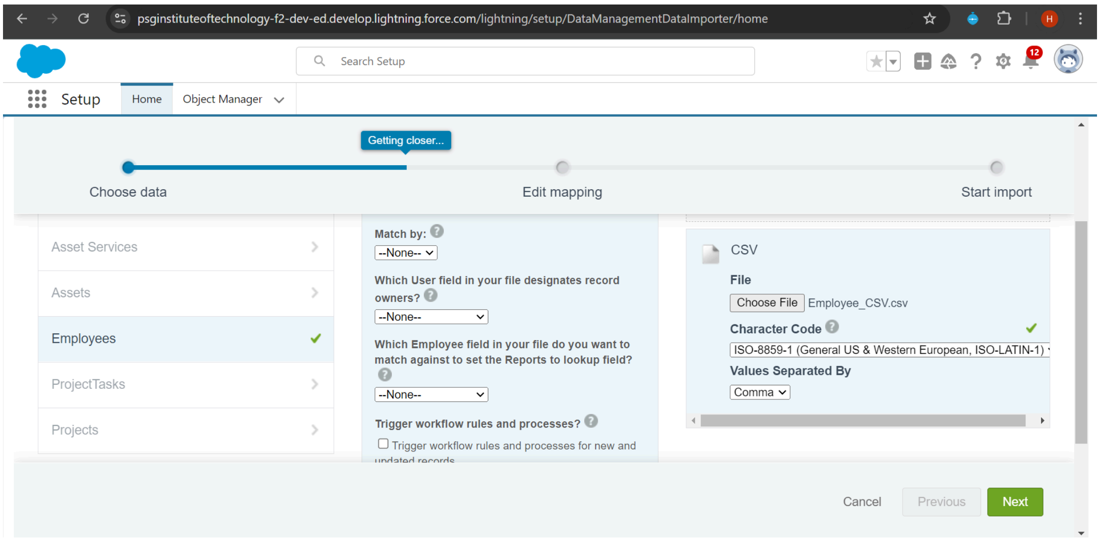

Search...
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Employees
More
Employee
EMS-0001
New Contact
Edit
New Opportunity
Related
Details
Employee ID
EMS-0001
Owner
Alisha Shinaz
Employee Name
Harshitaa G A
Date of Birth
14/11/2003
Age
21.00
Gender
Female
Reports to
To Do List

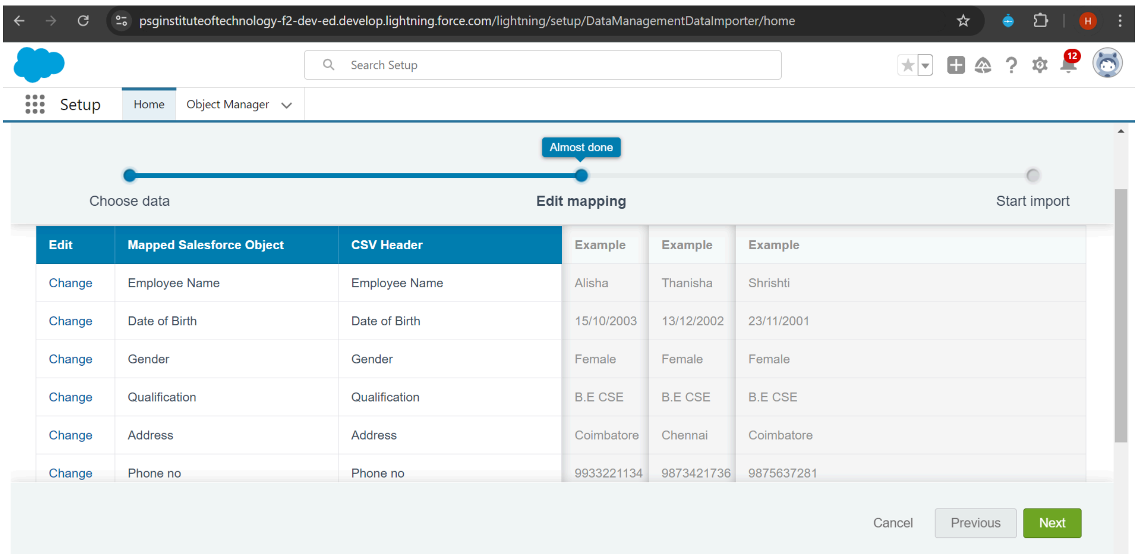

psginstituteoftechnology-f2-dev-ed.develop.lightning.force.com/lightning/o/Employee__c/list?filterName=__Recent
Search...
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Employees
More
Employees
Recently Viewed
New
Import
Change Owner
Assign Label
2 items • Updated a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

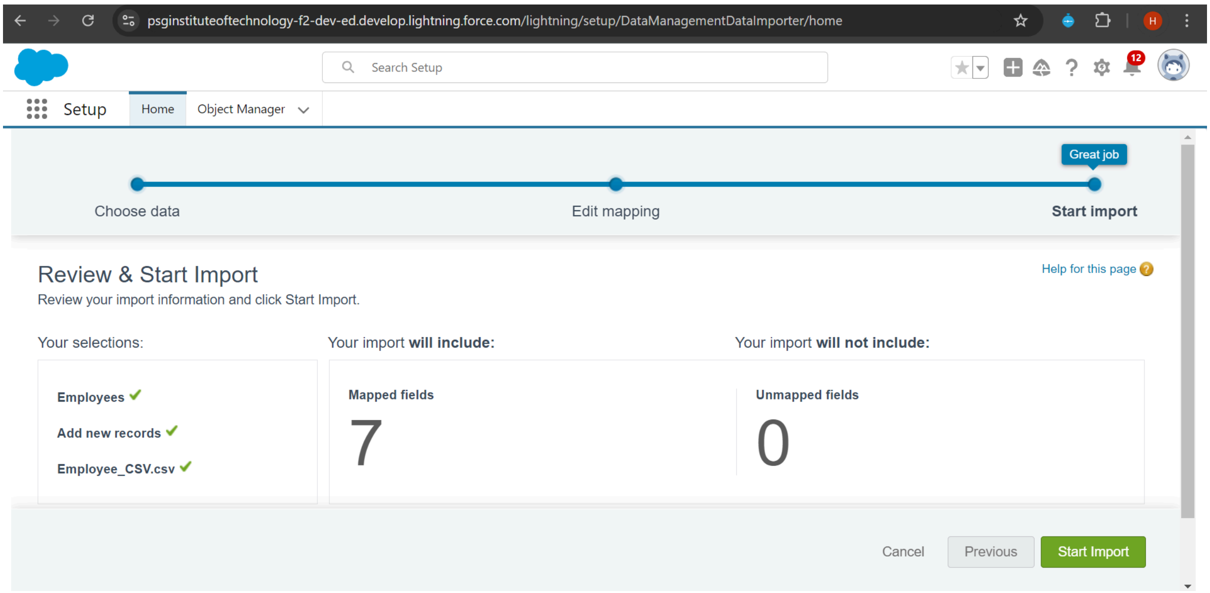
8. Import Data

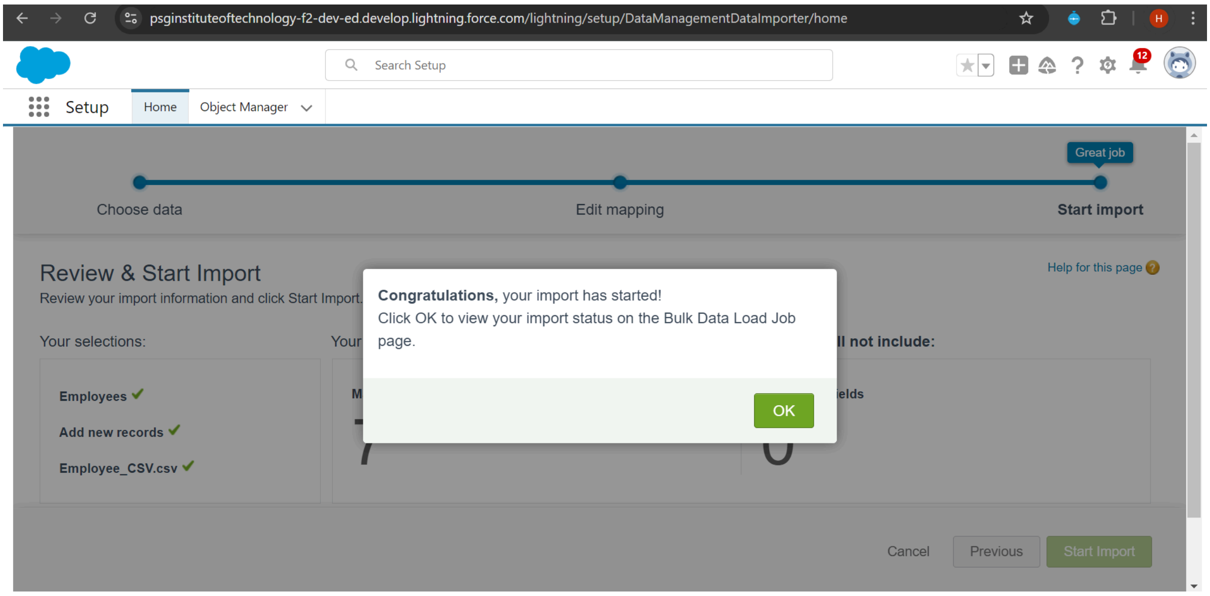
- Importing data using Data Wizard.

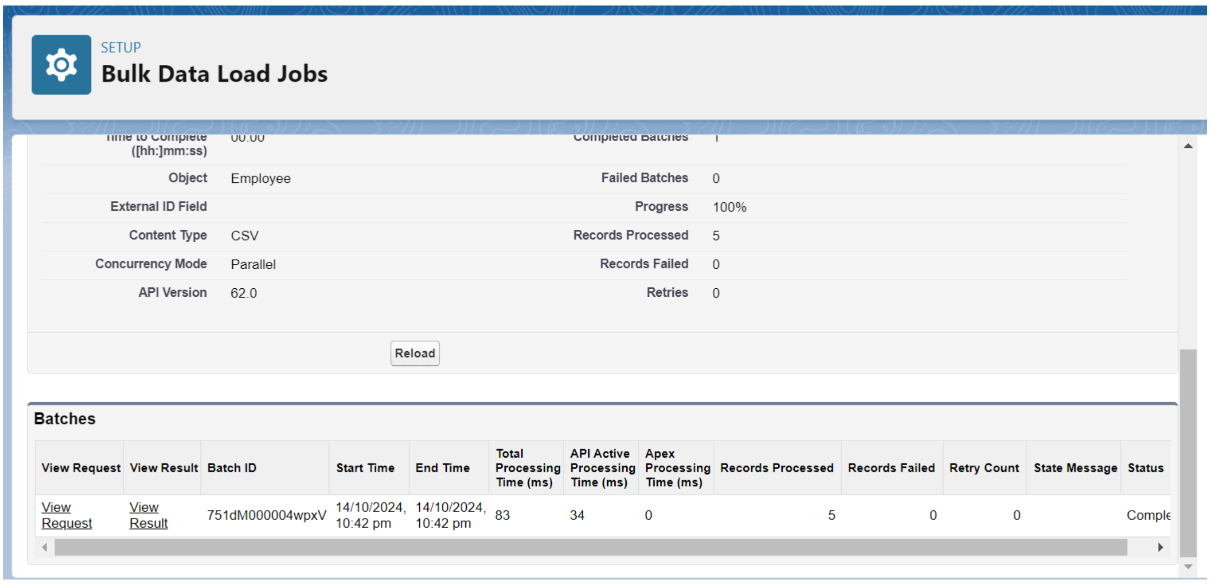






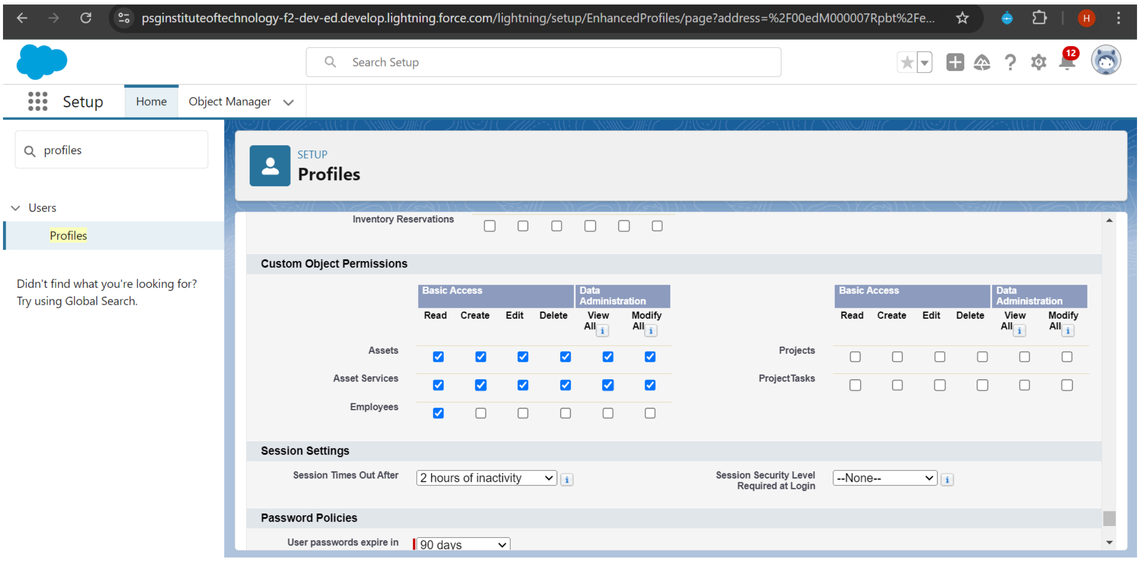

psginstituteoftechnology-f2-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home
Search Setup
Setup
Home
Object Manager
Great job
Choose data
Edit mapping
Start import
Review & Start Import
Review your import information and click Start Import.
Help for this page
Your selections:
Your import will include:
Your import will not include:
Employees
Add new records
Employee_CSV.csv
Mapped fields
7
Unmapped fields
0
Cancel
Previous
Start Import

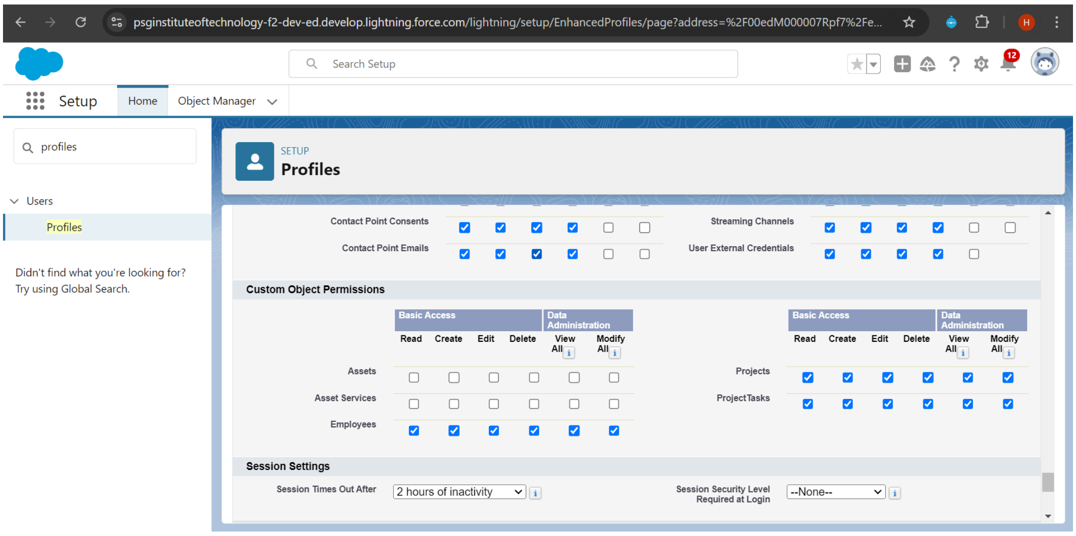

psginstituteoftechnology-f2-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home
Search Setup
Setup
Home
Object Manager
Great job
Choose data
Edit mapping
Start import
Review & Start Import
Review your import information and click Start Import.
Help for this page
Your selections:
Congratulations, your import has started!
Click OK to view your import status on the Bulk Data Load Job page.
OK
Employees
Add new records
Employee_CSV.csv
Cancel
Previous
Start Import

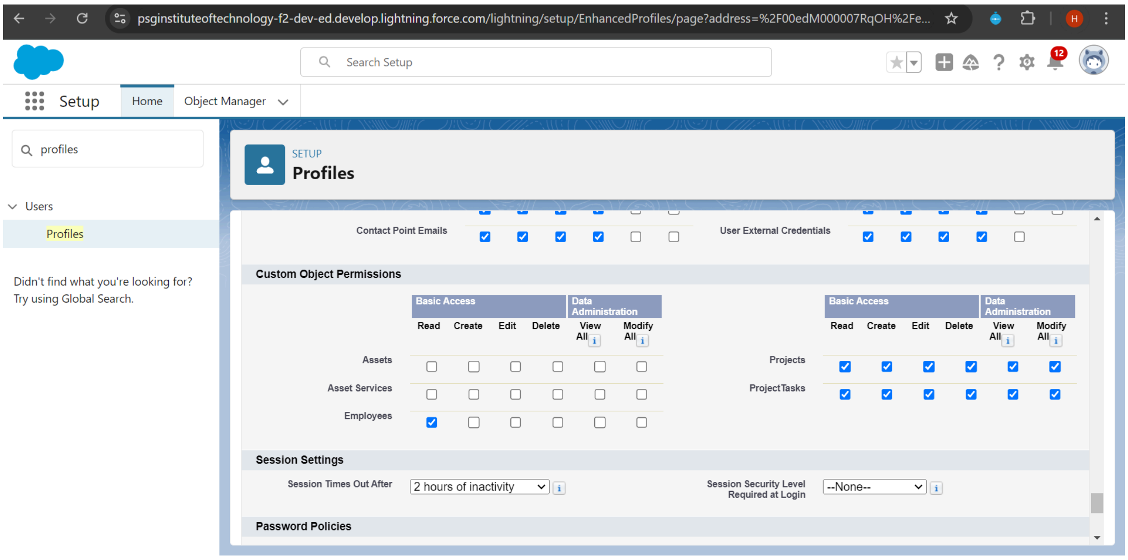

SETUP
Bulk Data Load Jobs
Object Employee
Failed Batches 0
External ID Field
Progress 100%
Content Type CSV
Records Processed 5
Concurrency Mode Parallel
Records Failed 0
API Version 62.0
Retries 0
Reload
Batches
View Request
View Result
Batch ID
Start Time
End Time
Total Processing Time (ms)
API Active 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

9.Profiles

- HR Profile
- Manager Profile
- Create Employee Profile

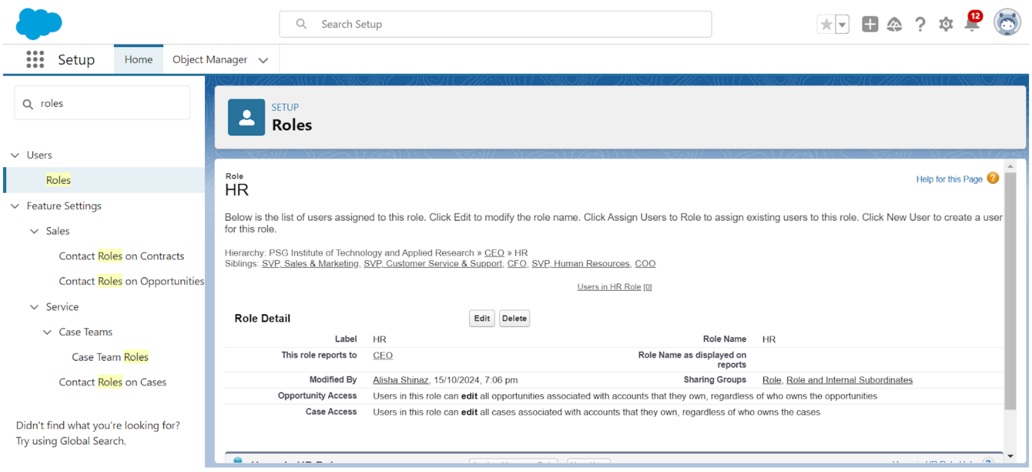


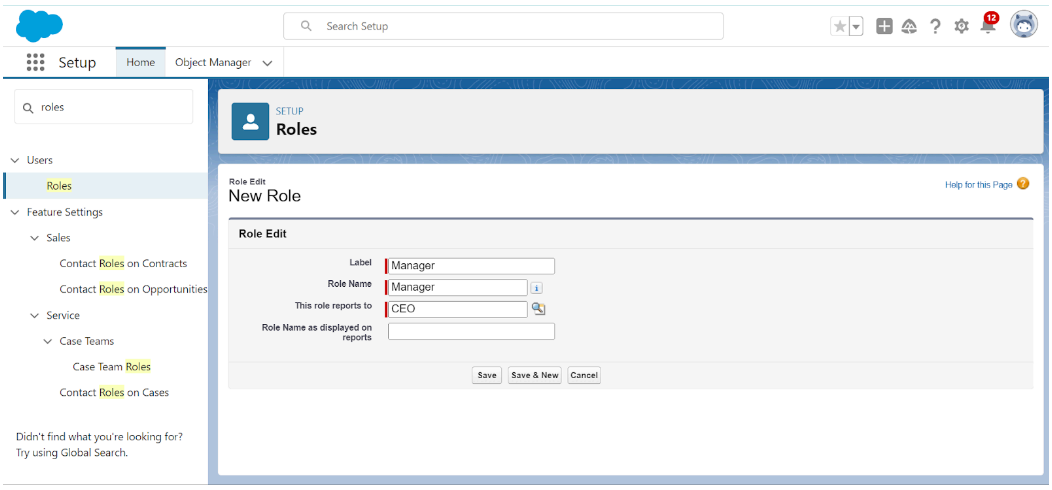


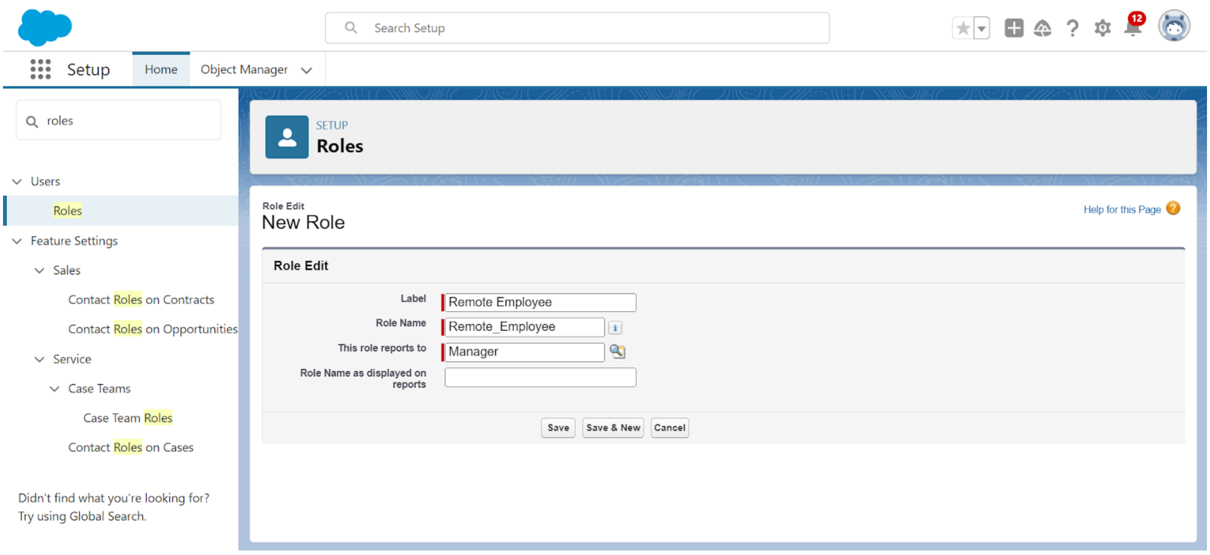


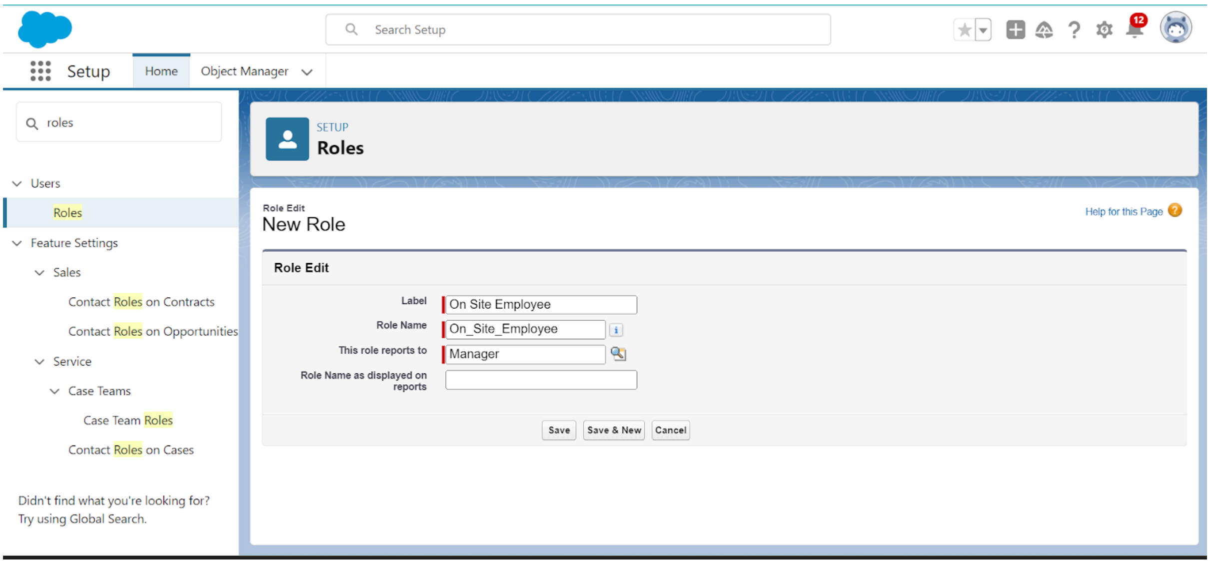
10. Roles

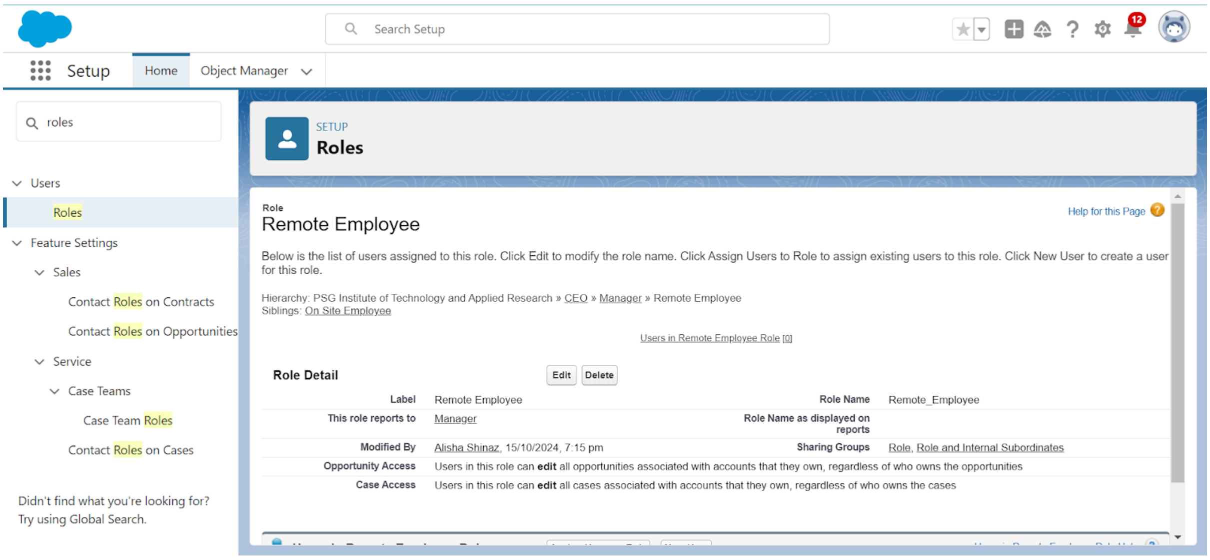
- Creating HR Role
- Creating Various Roles





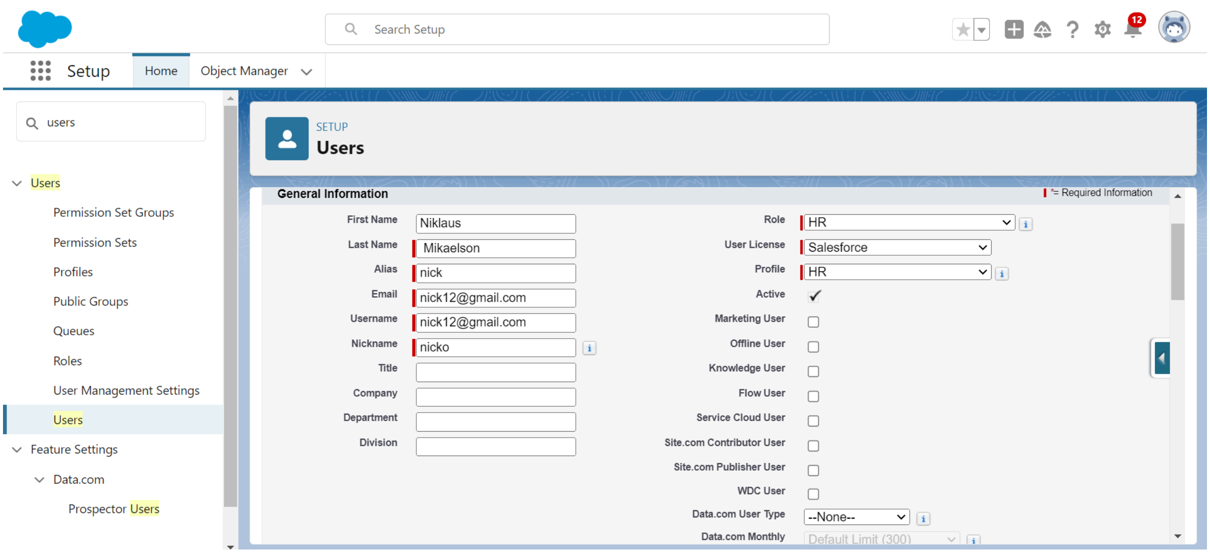

Search Setup
Setup
Home
Object Manager
roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
Role Edit
New Role
Help for this Page
Role Edit
Label
Remote Employee
Role Name
Remote_Employee
This role reports to
Manager
Role Name as displayed on reports
Save
Save & New
Cancel

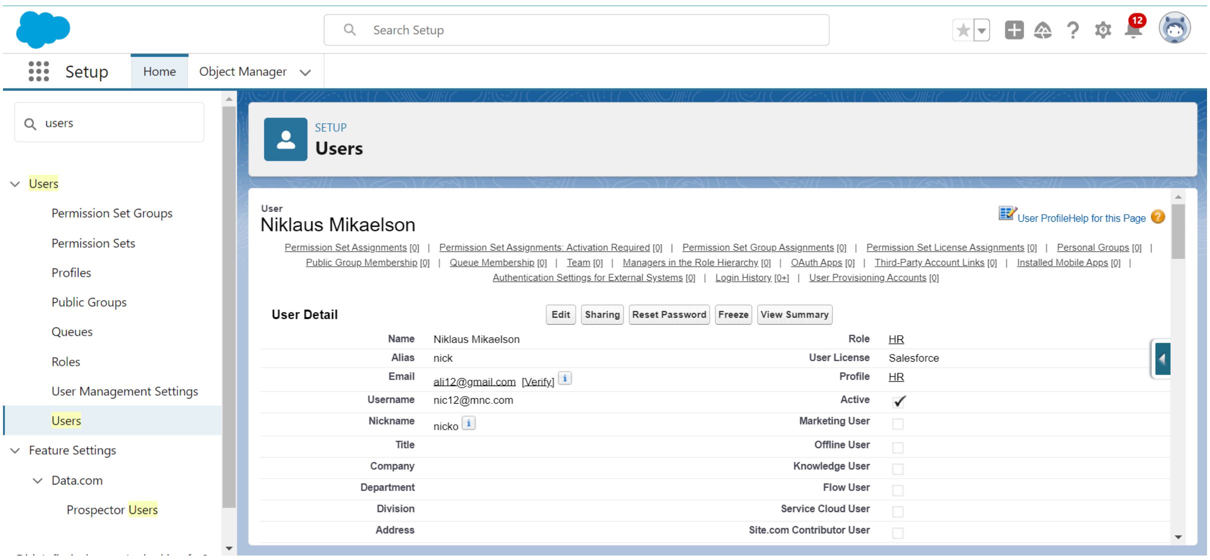

Search Setup
Setup
Home
Object Manager
roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
Role Edit
New Role
Help for this Page
Role Edit
Label
On Site Employee
Role Name
On_Site_Employee
This role reports to
Manager
Role Name as displayed on reports
Save
Save & New
Cancel

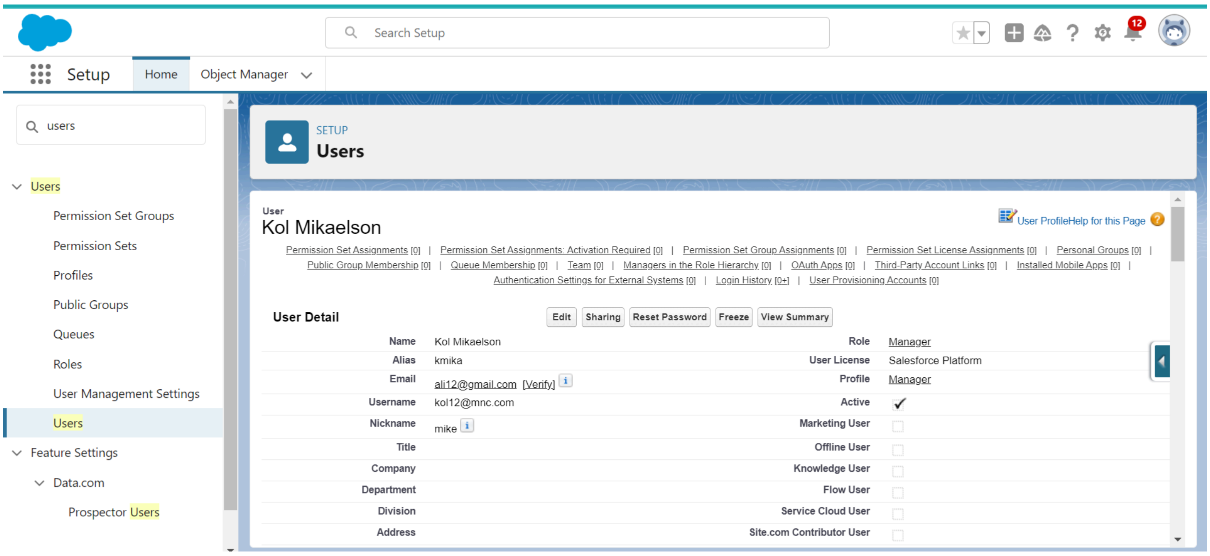


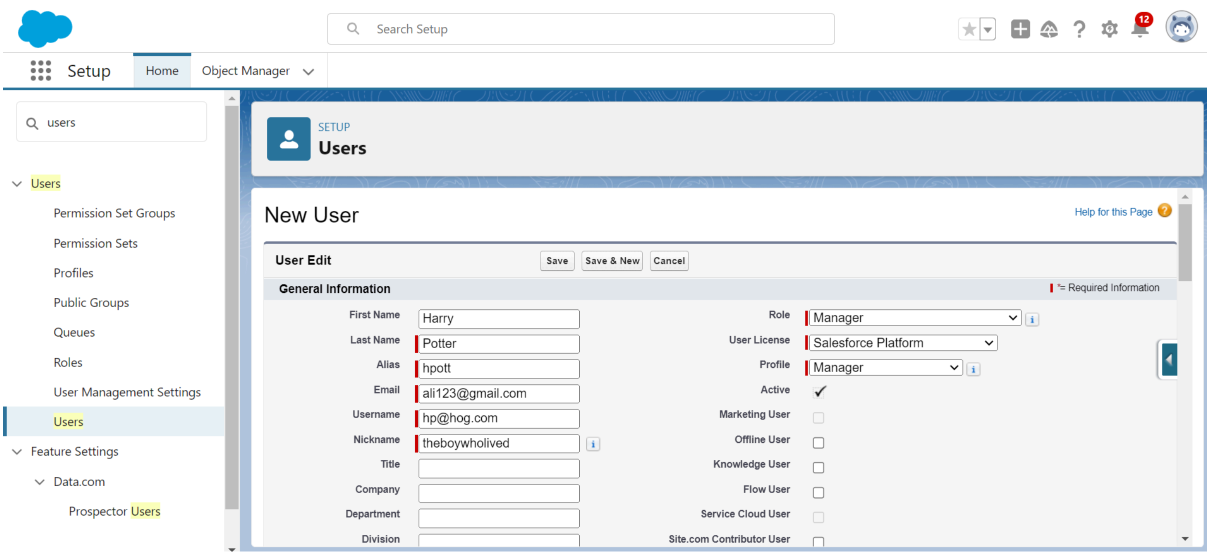
11. USERS

- Creating various users.



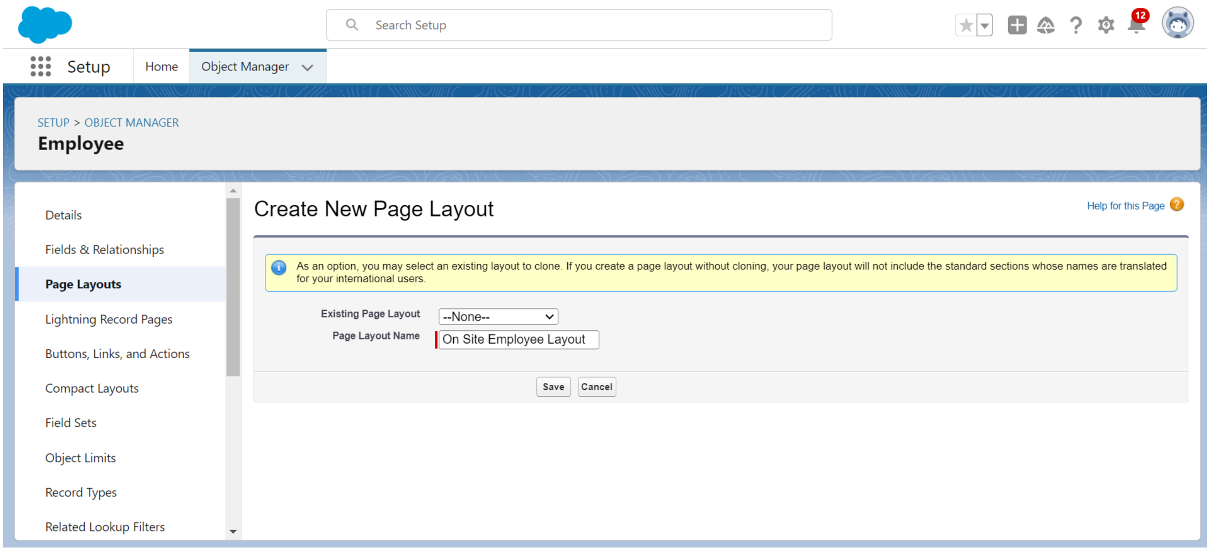


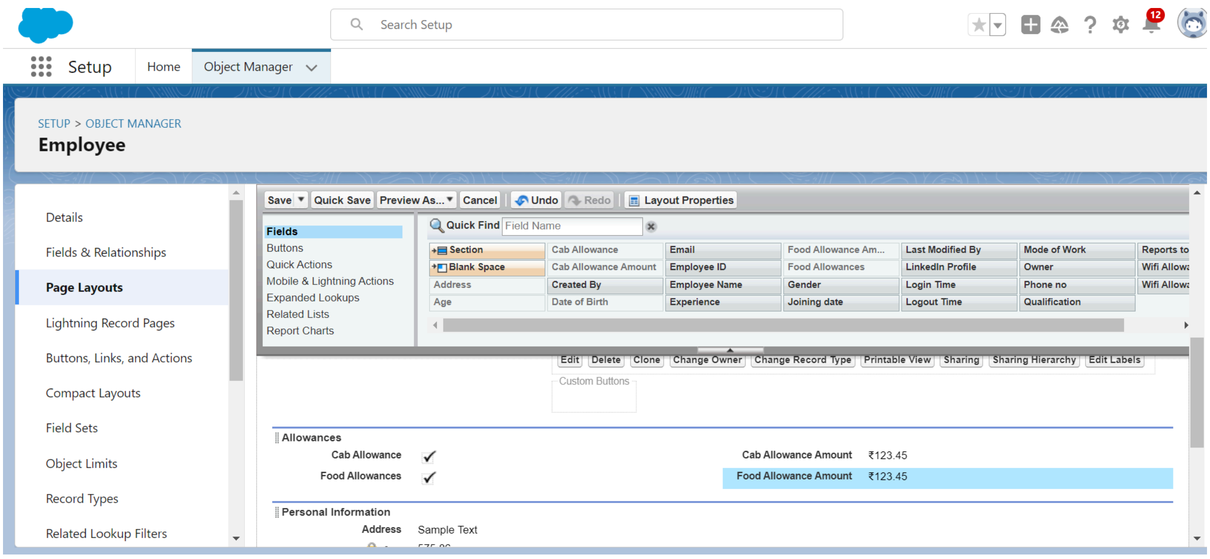


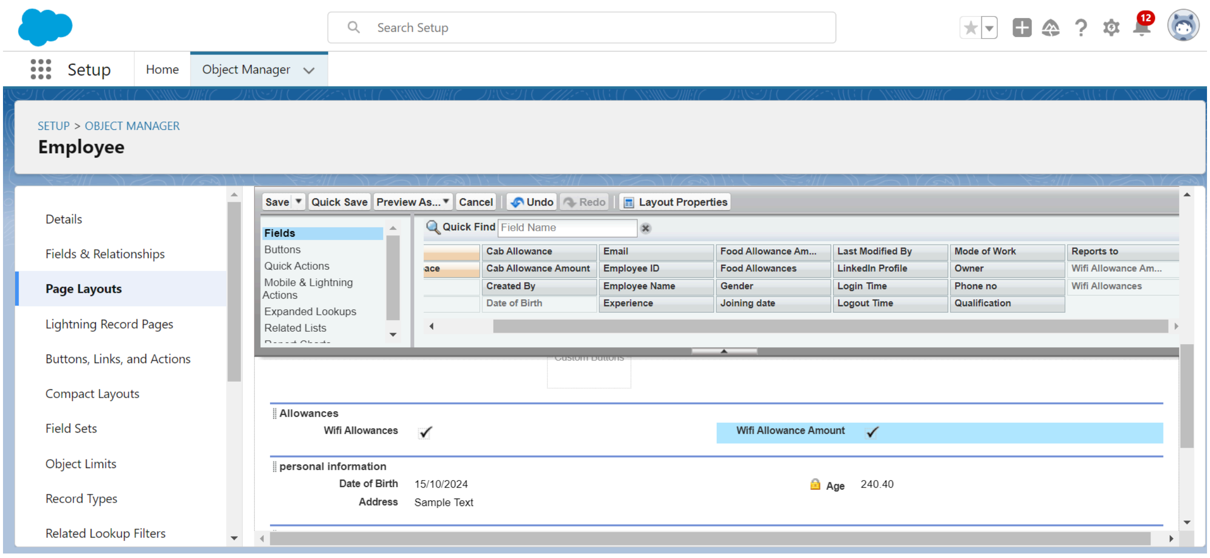


12. Page Layouts

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

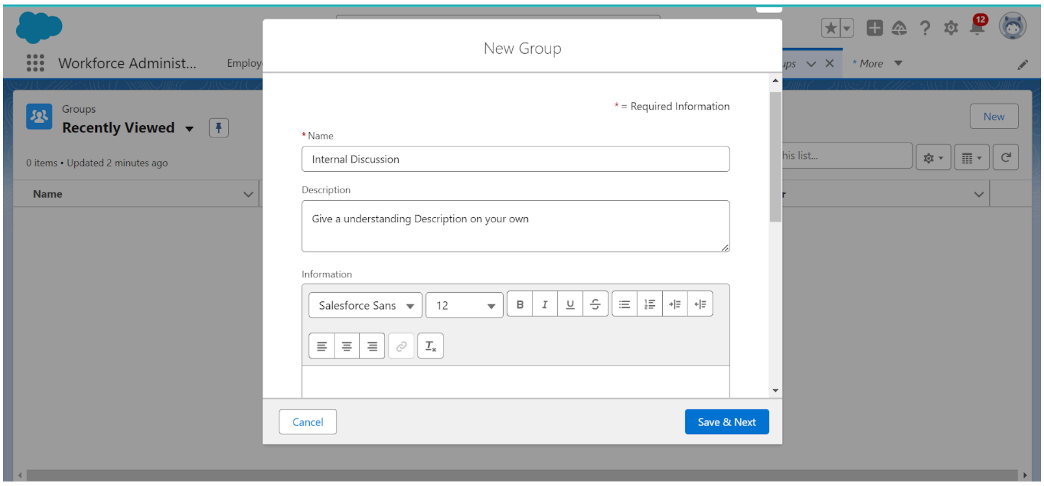

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Employee
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Create New Page Layout
Help for this Page
As an option, you 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

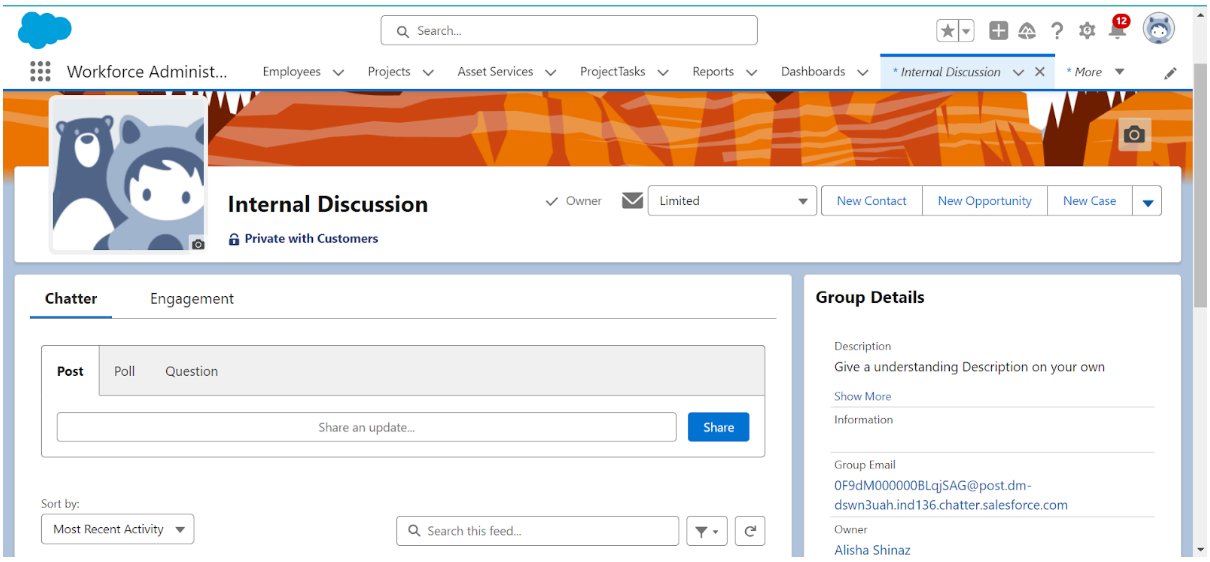

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Employee
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts
Quick Find
Field Name
Section
Blank Space
Address
Age
Cab Allowance
Cab Allowance Amount
Created By
Date of Birth
Email
Employee ID
Employee Name
Experience
Food Allowance Am...
Food Allowances
Gender
Joining date
Last Modified By
LinkedIn Profile
Login Time
Logout Time
Mode of Work
Owner
Phone no
Qualification
Reports to
Edit
Delete
Clone
Change Owner
Change Record Type
Printable View
Sharing
Sharing Hierarchy
Edit Labels
Custom Buttons
Allowances
Cab Allowance
Food Allowances
Cab Allowance Amount
₹123.45
Food Allowance Amount
₹123.45
Personal Information
Address
Sample Text


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Employee
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Quick Find
Field Name
Cab Allowance
Cab Allowance Amount
Created By
Date of Birth
Email
Employee ID
Employee Name
Experience
Food Allowance Am...
Food Allowances
Gender
Joining date
Last Modified By
LinkedIn Profile
Login Time
Logout Time
Mode of Work
Owner
Phone no
Qualification
Reports to
Wifi Allowance Am...
Wifi Allowances
Allowances
Wifi Allowances
Wifi Allowance Amount
personal information
Date of Birth
15/10/2024
Age
240.40
Address
Sample Text

13. Chatter Groups

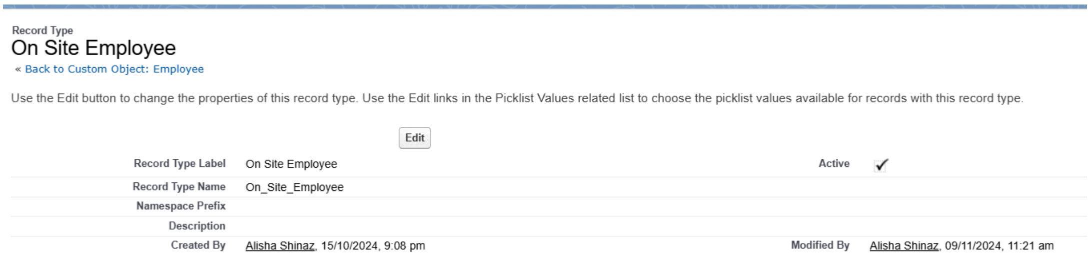
- Creating a chatter group for your organization.

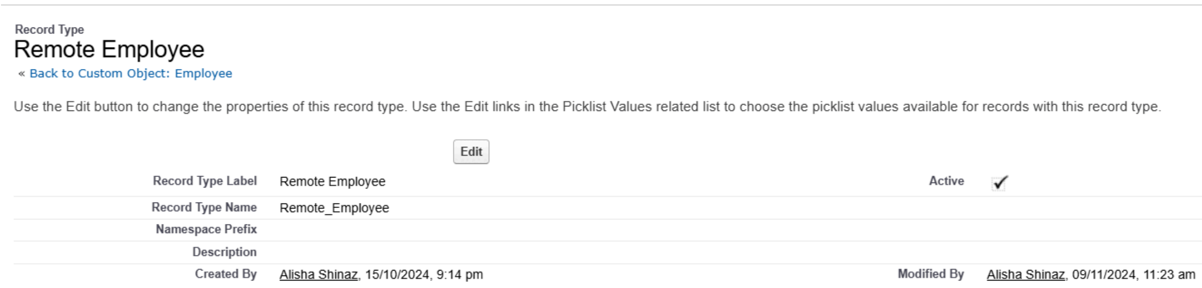




14. Record Types

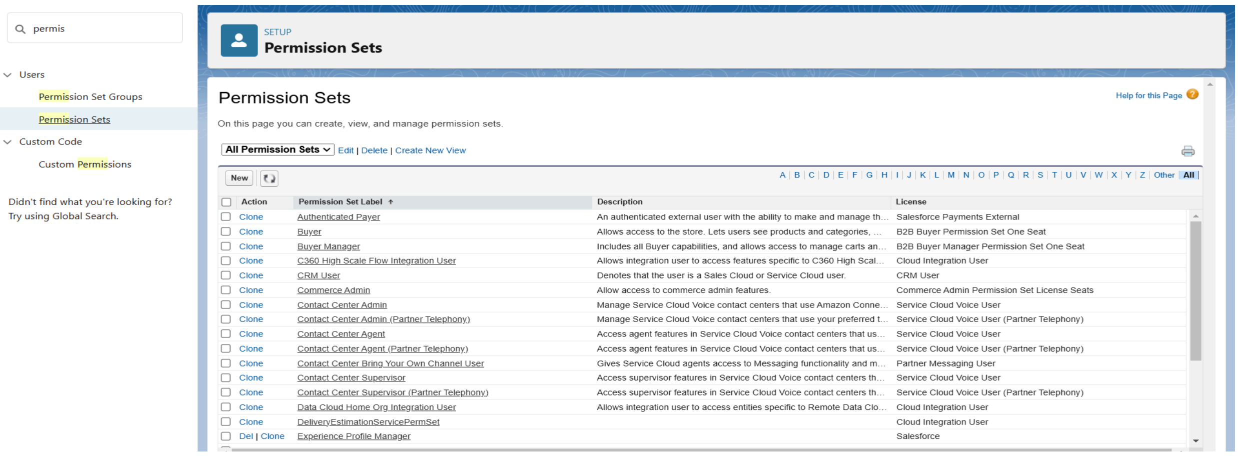
- Creating On Site Employee Record Type
- Creating "Remote Employee" Record type

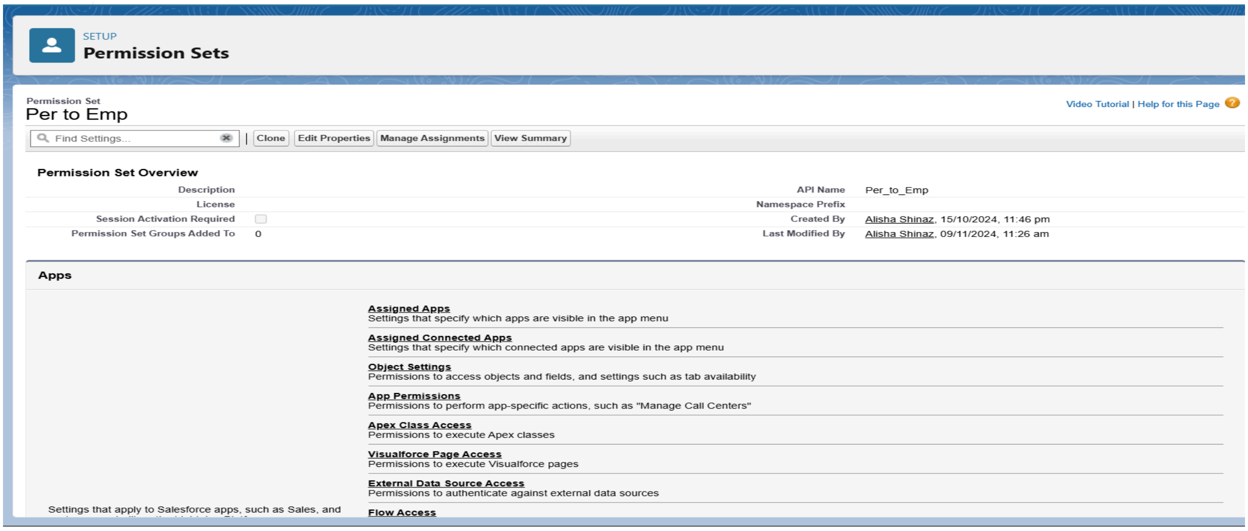


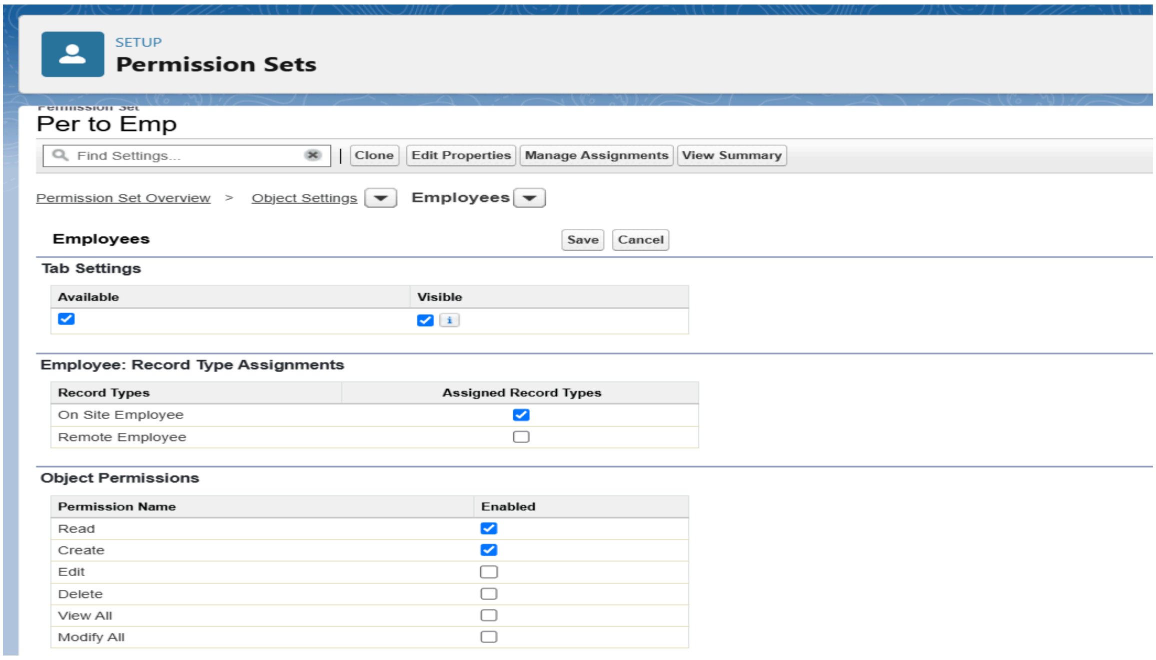


15. Permission sets

- Creating a permission set

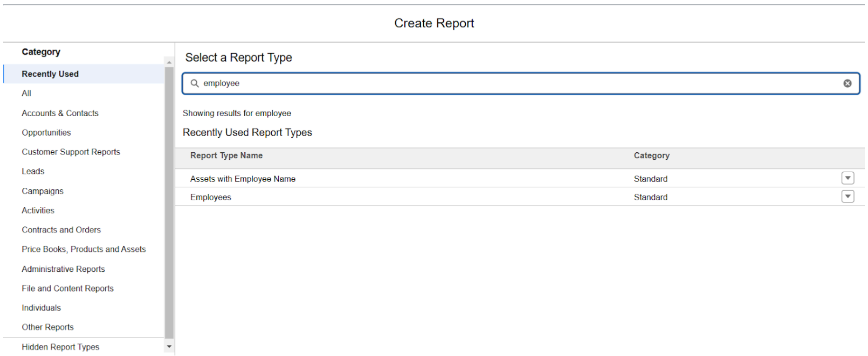


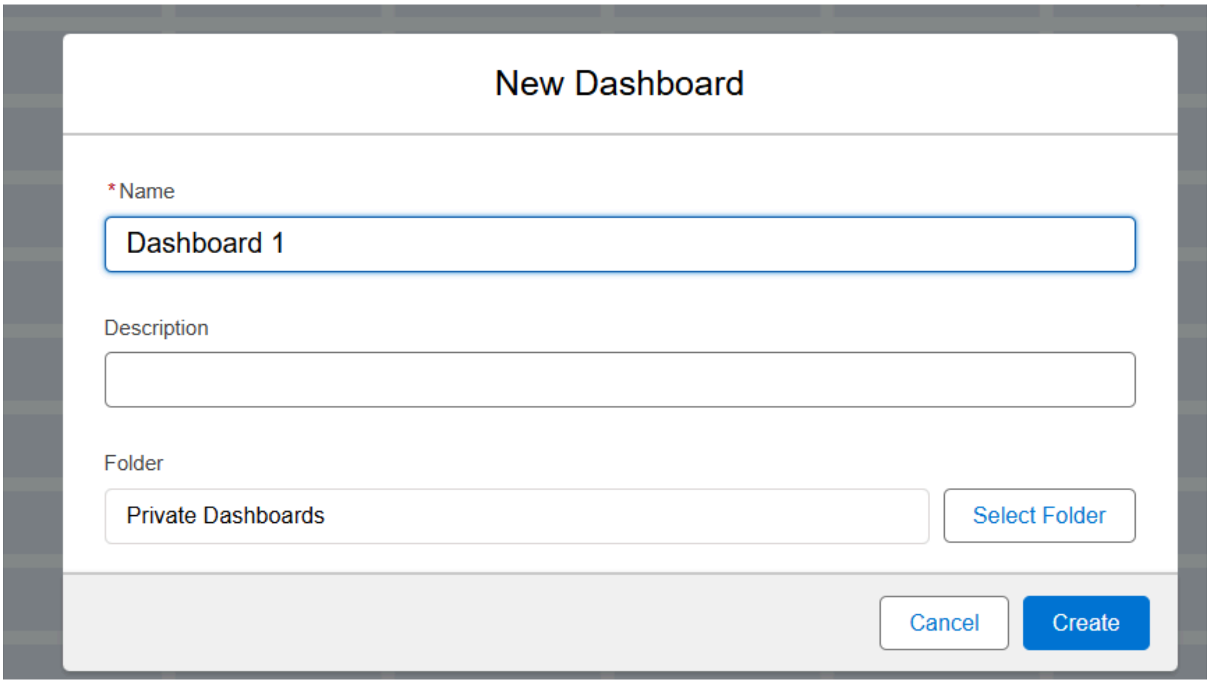


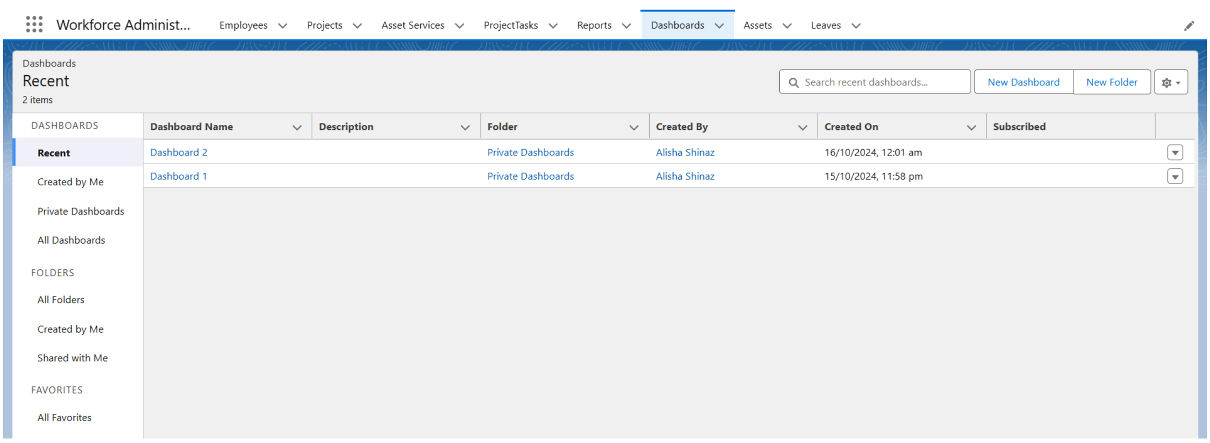


16. Reports And Dashboards

- Create Report
- Create 2 more Report
- Create Dashboard



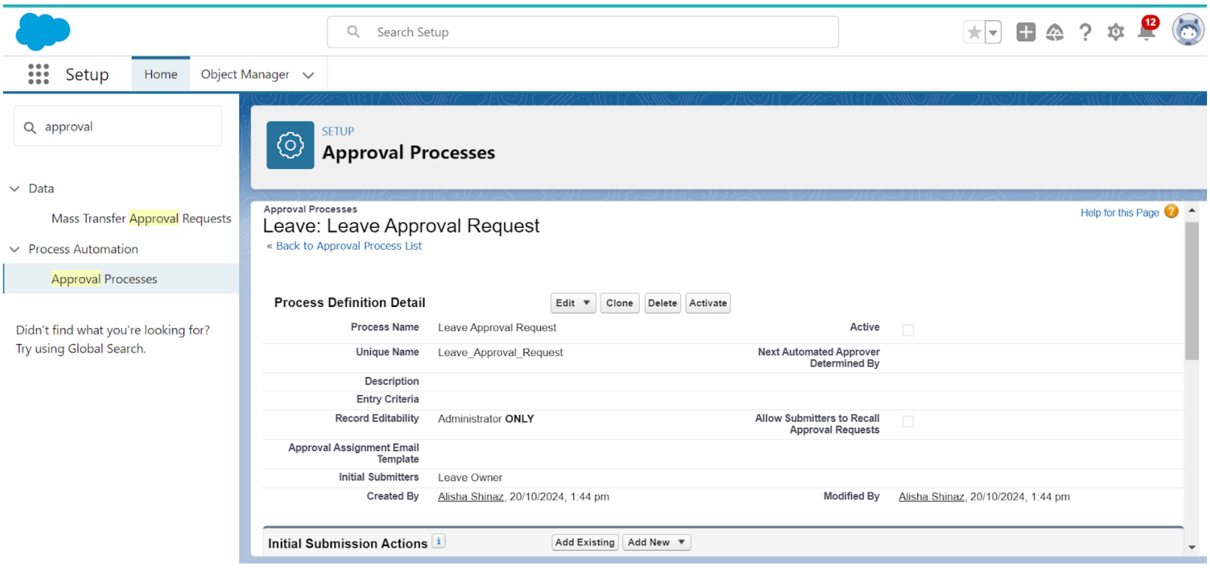


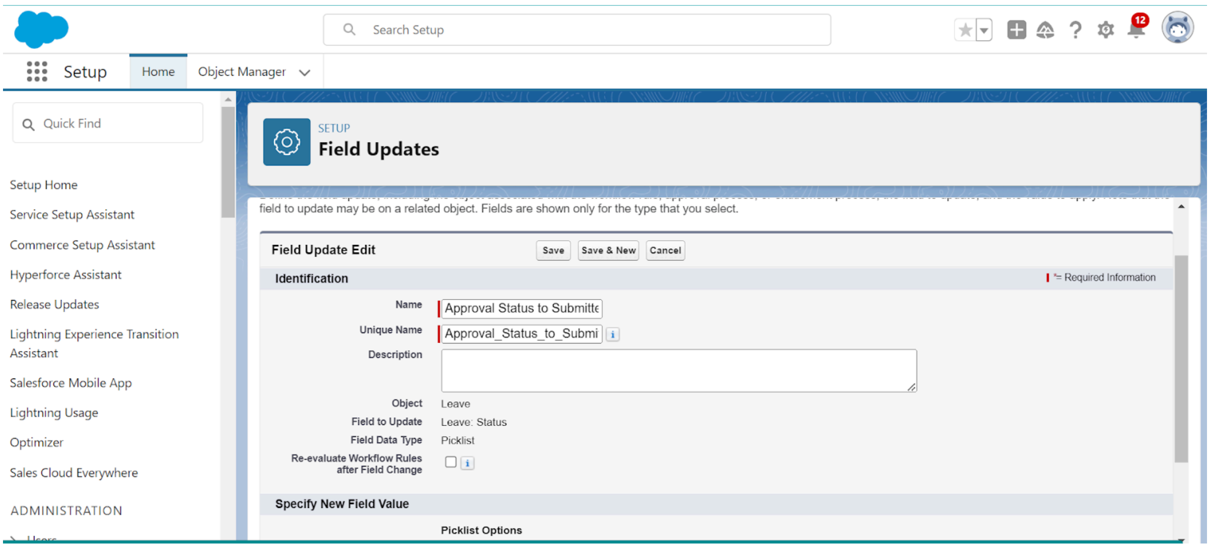


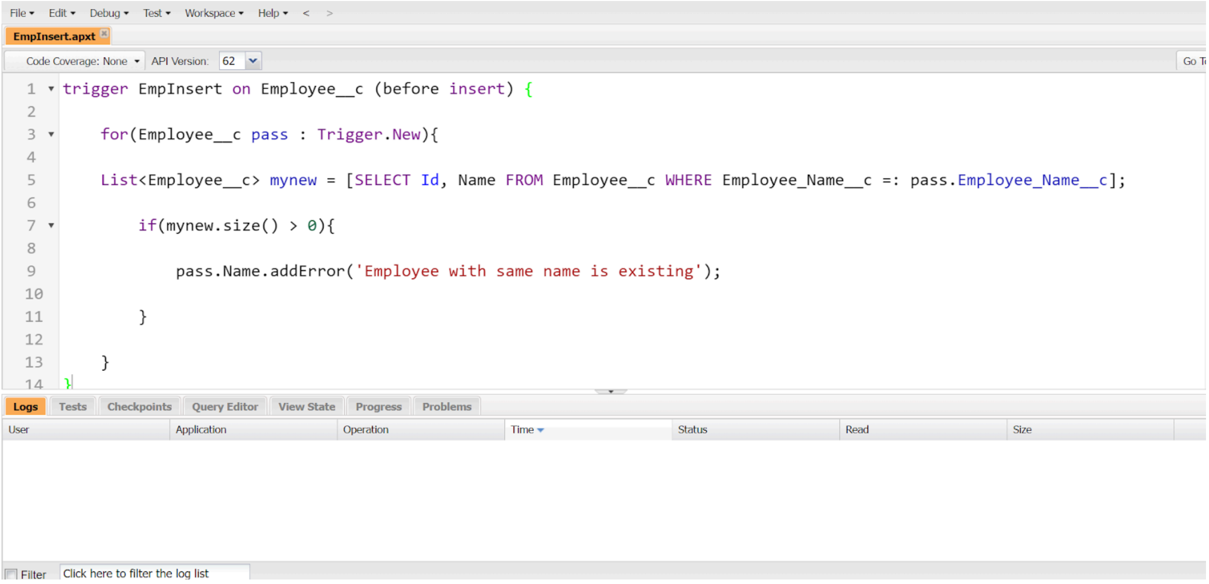
17.Approval Process And Apex Trigger

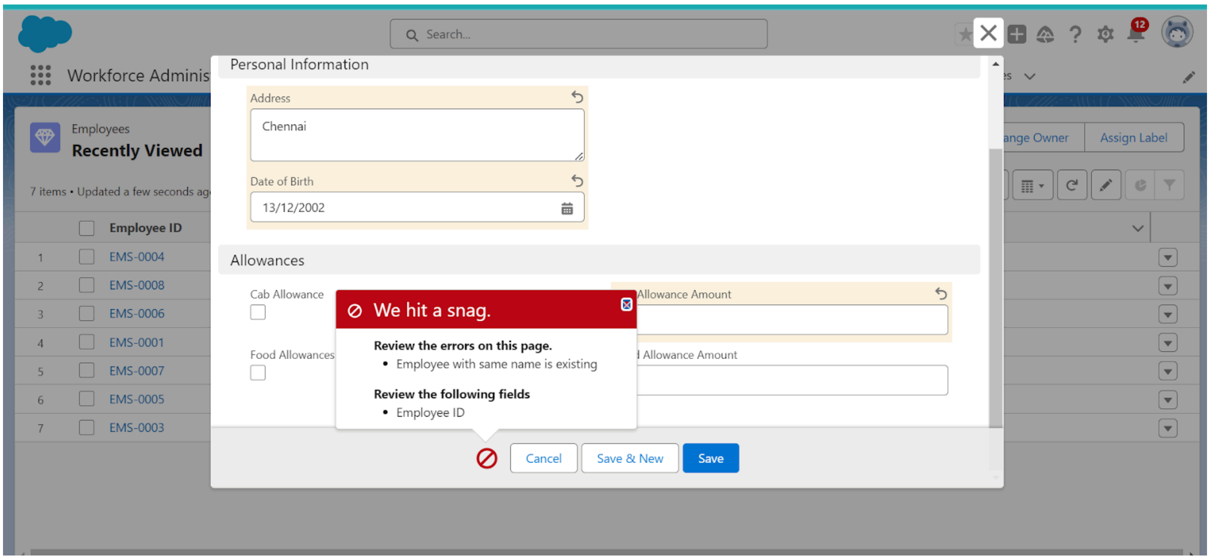
- Leave Approval Request

- Create an Apex Trigger
- Testing The Trigger






File Edit Debug Test Workspace Help
EmpInsert.apxt
Code Coverage: None API Version: 62
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');
}
}
}
Logs Tests Checkpoints Query Editor View State Progress Problems
User Application Operation Time Status Read Size
Filter Click here to filter the log list


Search...
Workforce Adminis
Employees
Recently Viewed
7 items • Updated a few seconds ag
Employee ID
EMS-0004
EMS-0008
EMS-0006
EMS-0001
EMS-0007
EMS-0005
EMS-0003
Personal Information
Address
Chennai
Date of Birth
13/12/2002
Allowances
Cab Allowance
Food Allowances
Allowance Amount
Allowance Amount
We hit a snag.
Review the errors on this page.
Employee with same name is existing
Review the following fields
Employee ID
Cancel
Save & New
Save
ange Owner
Assign Label

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.