Workforce Administration Solution (Dev)

College: KALLAM HARANADHA REDDY INSTITUTE OF TECHNOLOGY

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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.

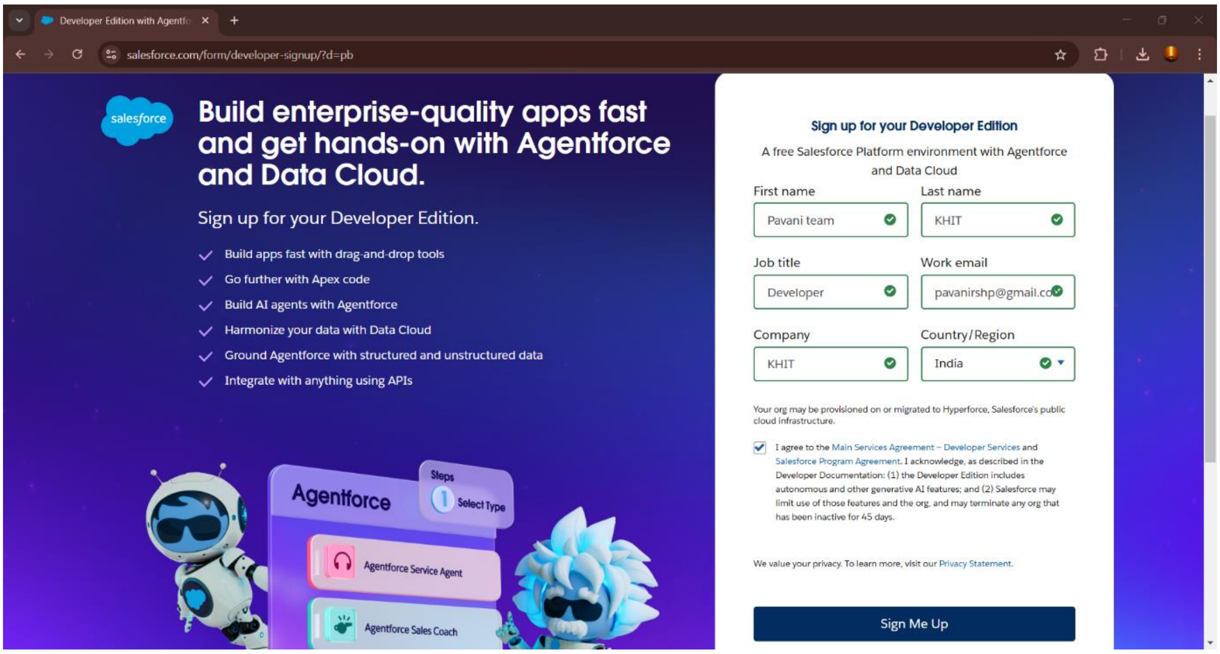
- Role
    - Role Hierarchy: Set up a role hierarchy to define data visibility and reporting structure, ensuring managers can access subordinate data while protecting sensitive information.
- Users
    - User Creation: Added users with designated profiles and roles, providing them access to specific 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.

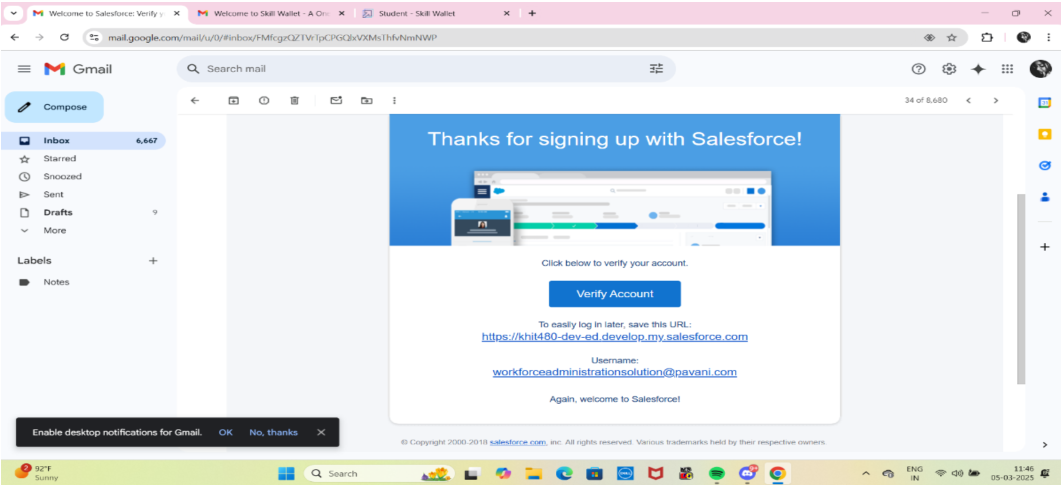
- Approval Process
  - Approval Workflow for Asset Requests: Set up an approval process for employees to request assets, which requires **manager** approval before assets are assigned, ensuring control and accountability.
- Apex Trigger
  - Automated Notifications and Calculations: Developed Apex triggers 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.

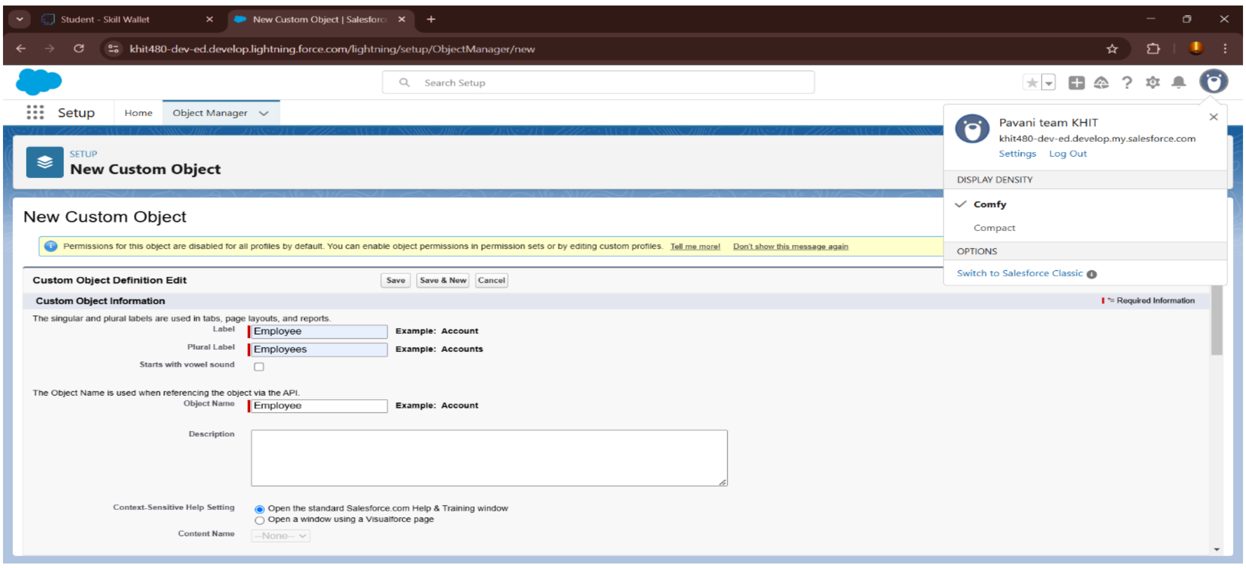


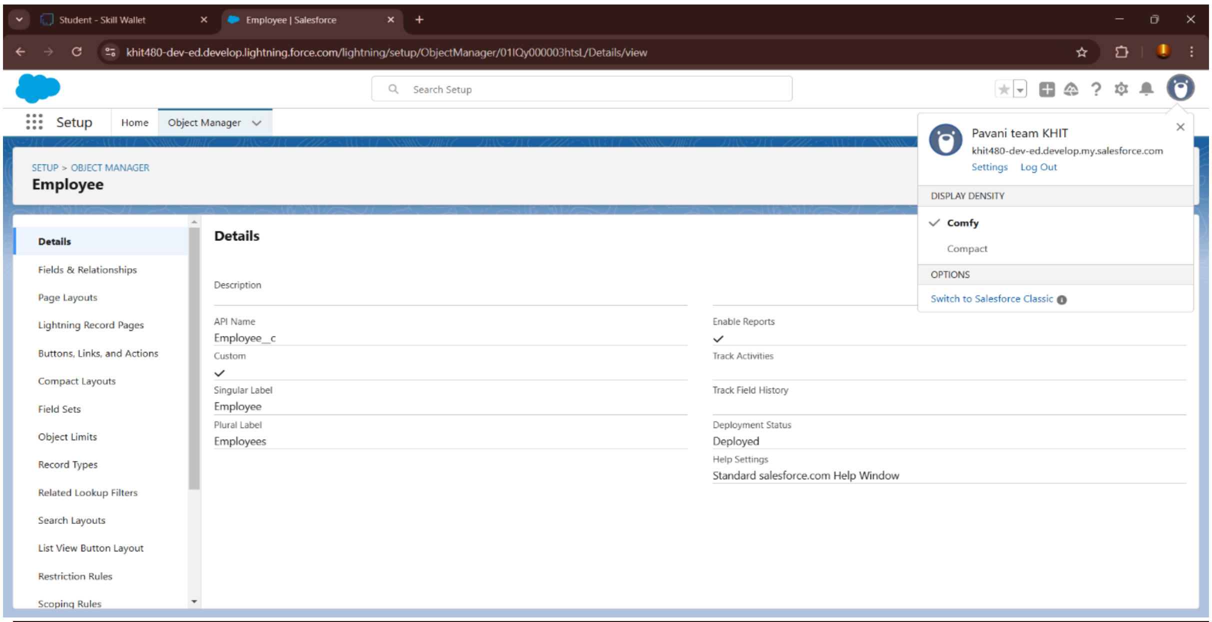


Defined Objects

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

1. Log in to your Salesforce account
2. Select Setup
3. Search for Object Manager
4. Select Create
5. Select Custom Object
6. Enter the following information:
    - **Label**
    - **Plural Label**
    - **Object Name**
8. Select Save.

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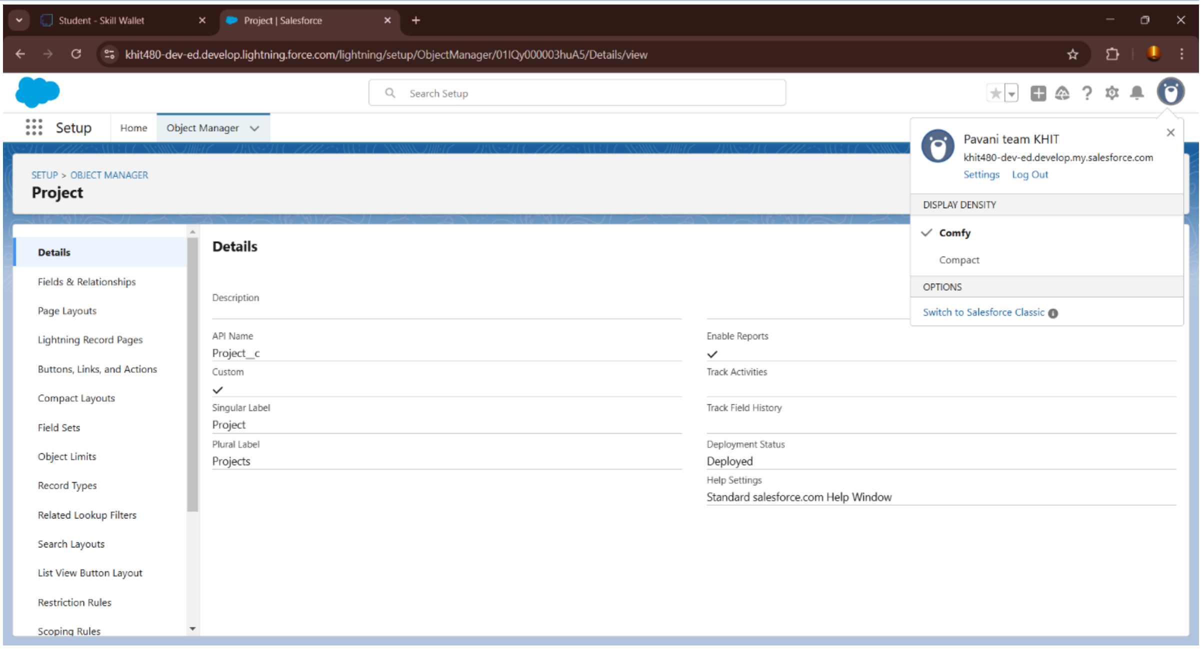
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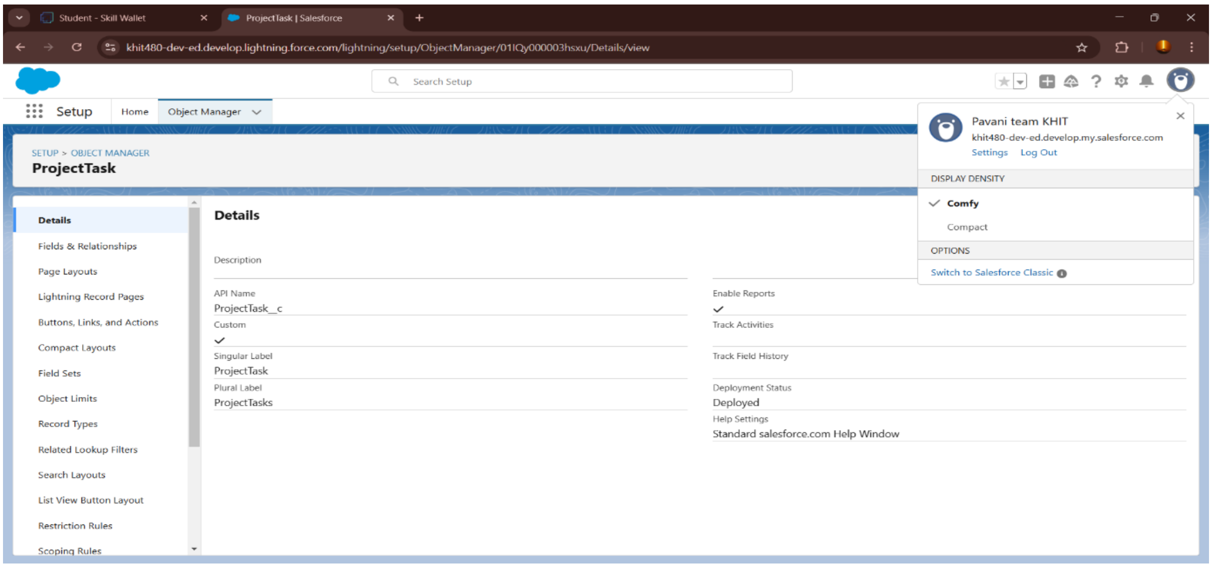
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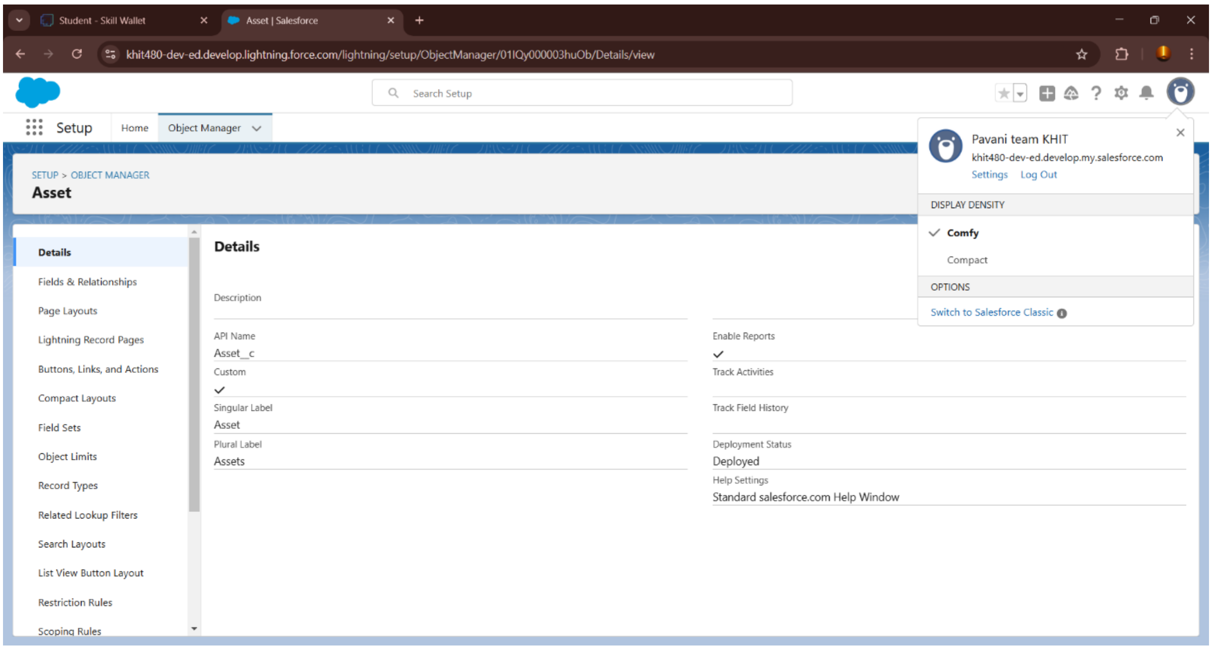
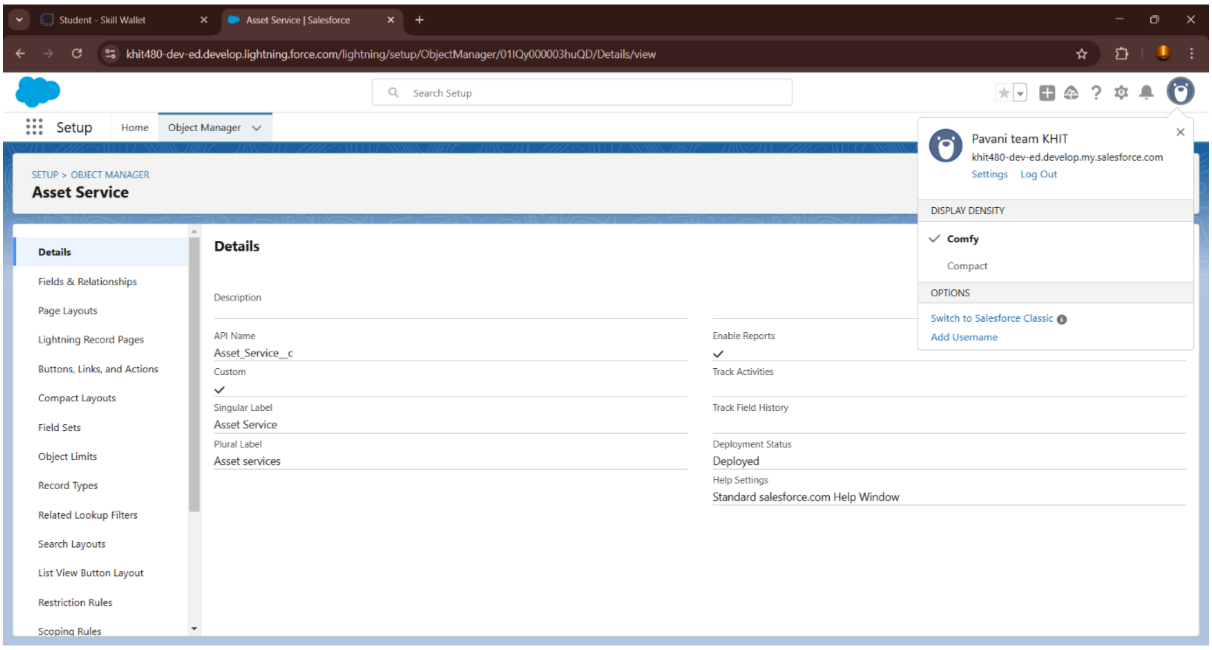
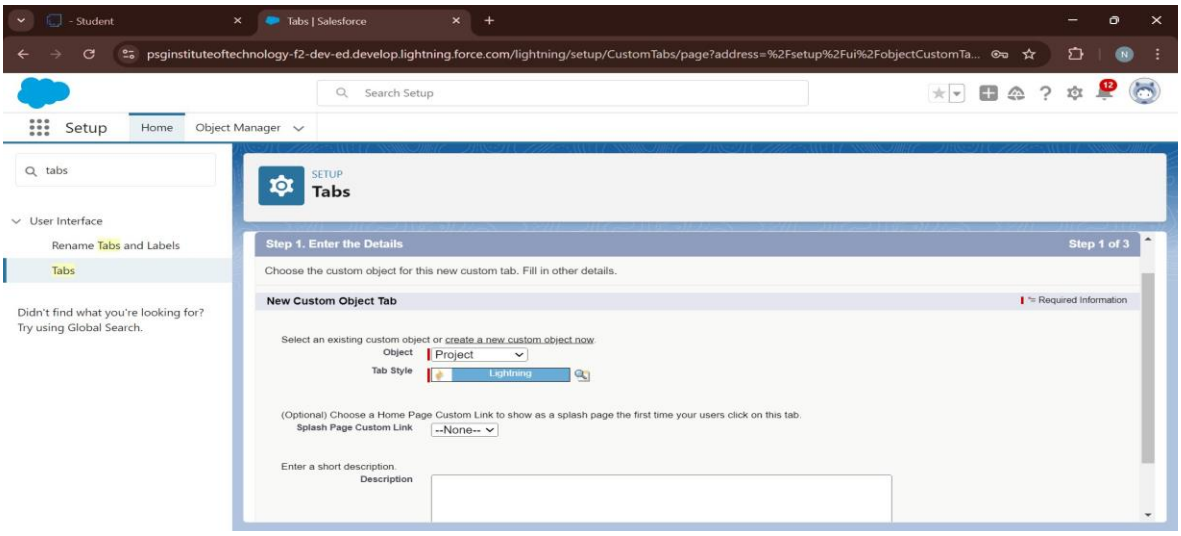


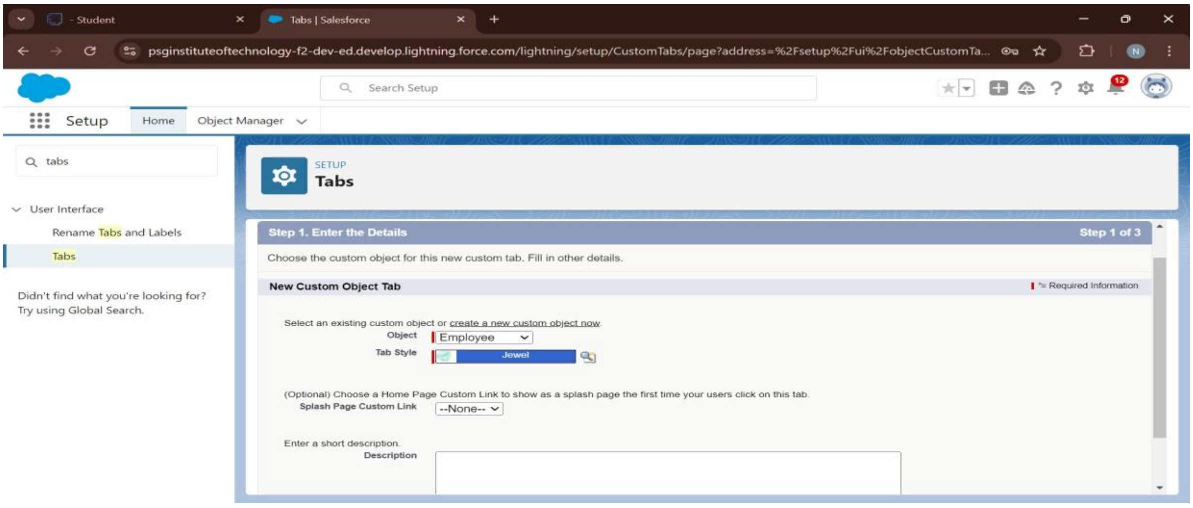


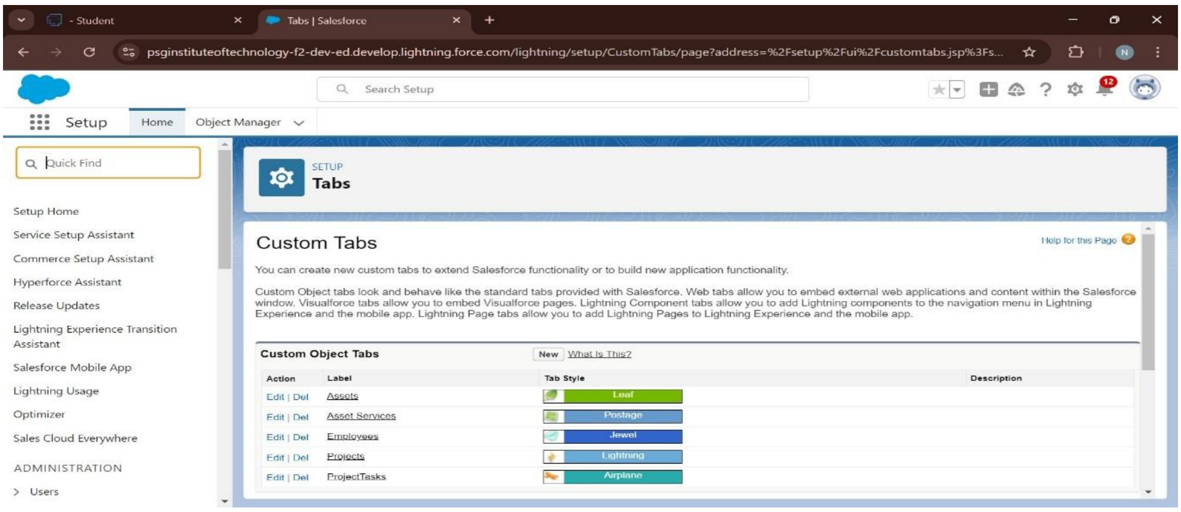
2. Configured Tabs

- 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.
    - Go to Setup Page
    - Search for Tabs in the Quick Find box
    - Select Tabs

- Click New under Custom Object Tabs
- Select the object you want to create the tab for
- Choose a tab style
- Enter any other required details
- Click Save

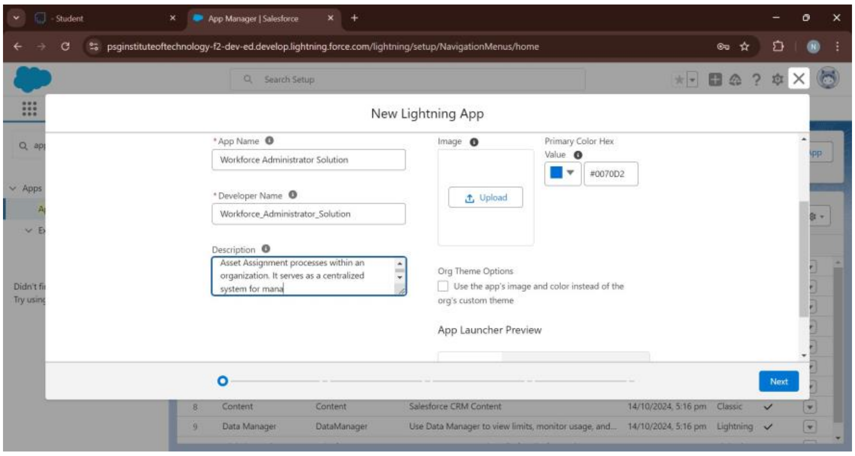




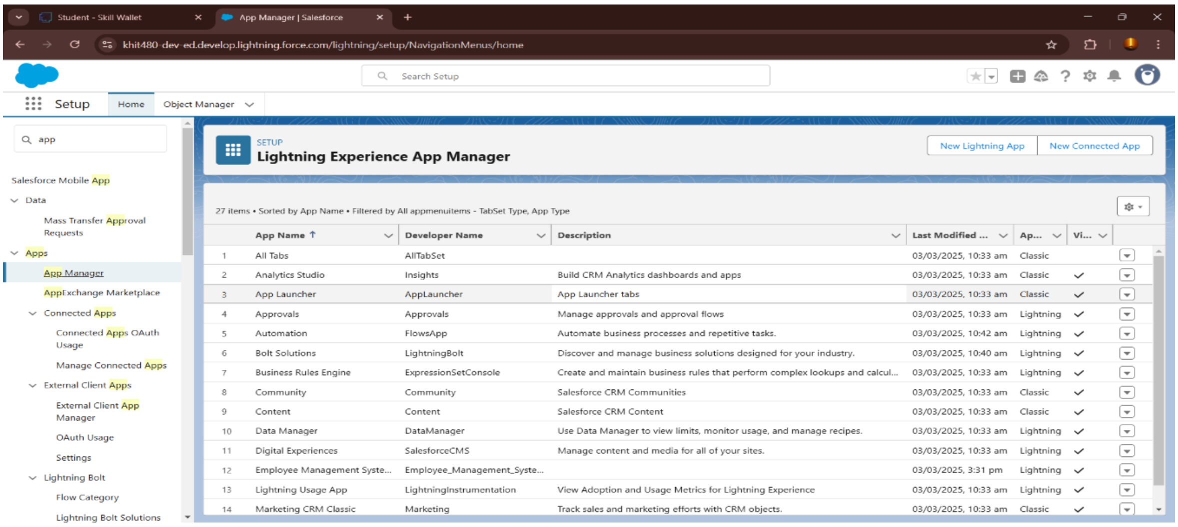


Developed the Lightning App

- 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 apps let you brand your apps with a custom colour and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching betweenapps.



Added Fields to Objects

- Creating Text Field in Employee Object

1.Go to setup / click on Object Manager / type object name(Employee) in quick find bar / click on the object.

2. click on “Fields & Relationships” / New

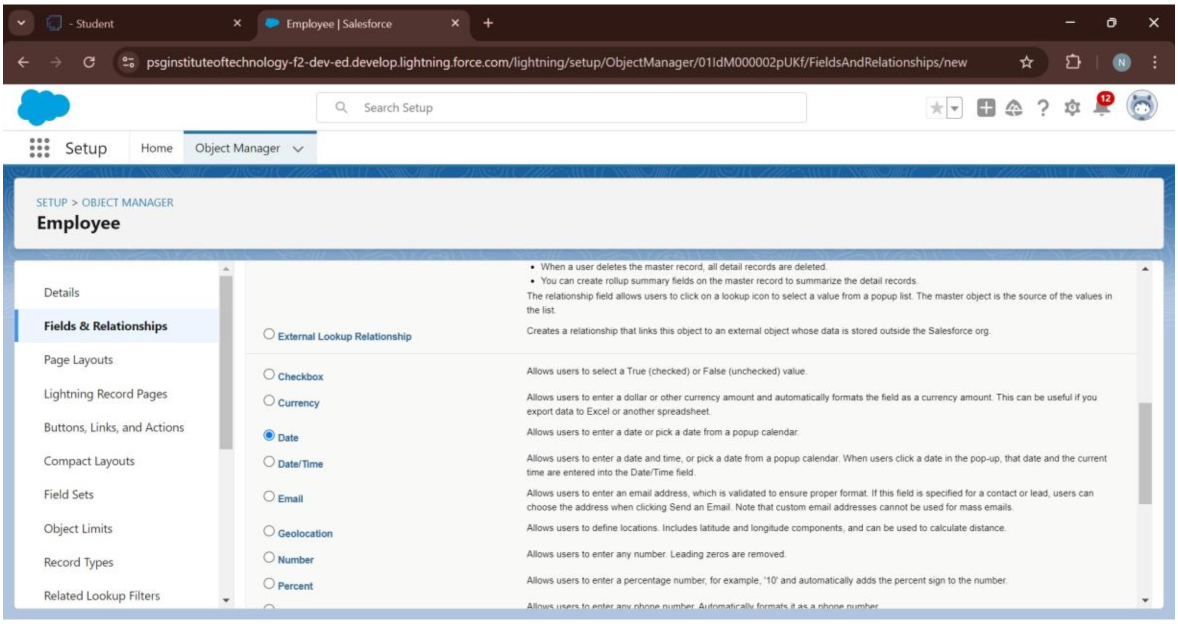
3.Select Data type as “Text”.

4. Field Label: Employee Name

Length : 18

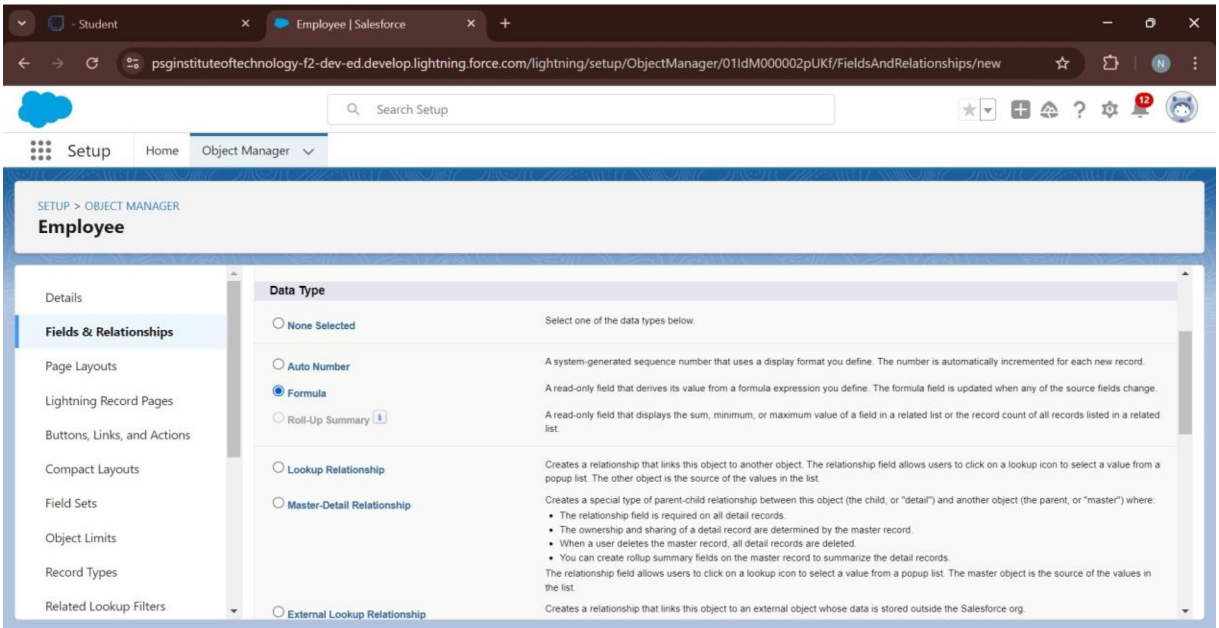
Field Name : gets auto generated

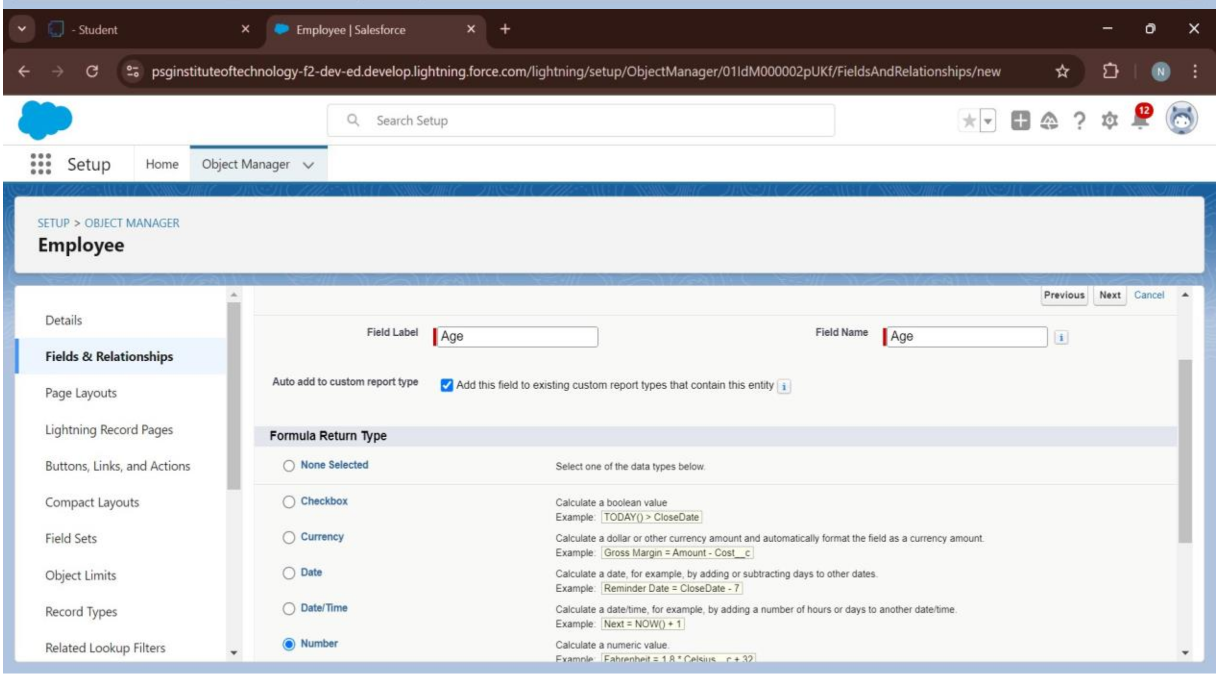
Click on Next / Next / Save and new.



Follow the above same steps and create the remaining fields with different data types and labels.

- 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

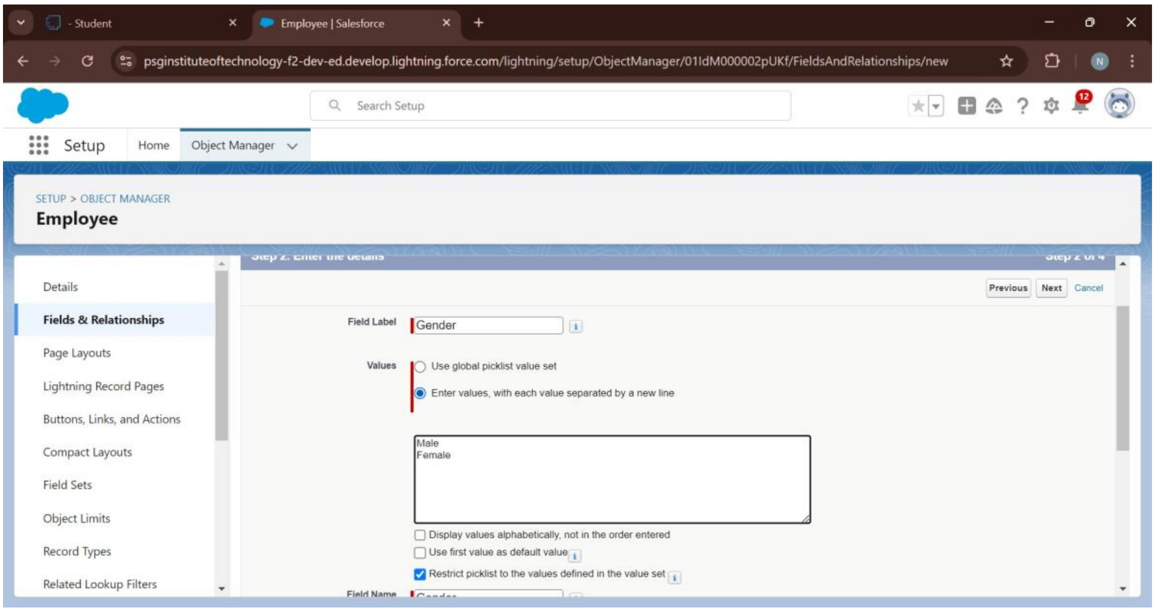




When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

1. Standard Fields
2. Custom Fields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Buttons, Links, and Actions
Compact Layouts
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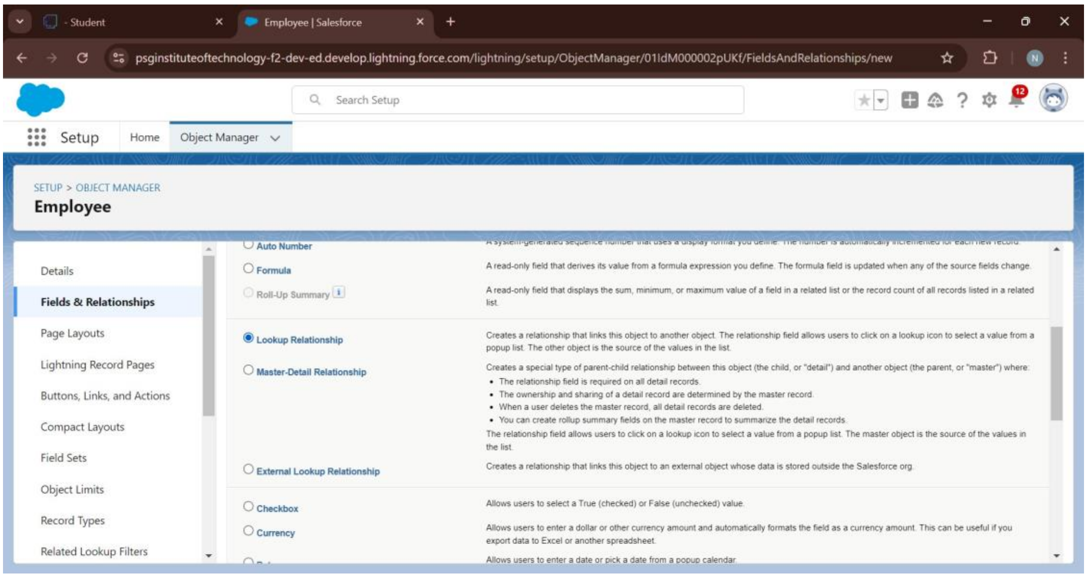
Object Limits
Record Types
Related Lookup Filters
Previous
Next
Cancel
Field Label
Gender
Values
Use global picklist value set
Enter values, with each value separated by a new line
Male
Female
Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set
Field Name

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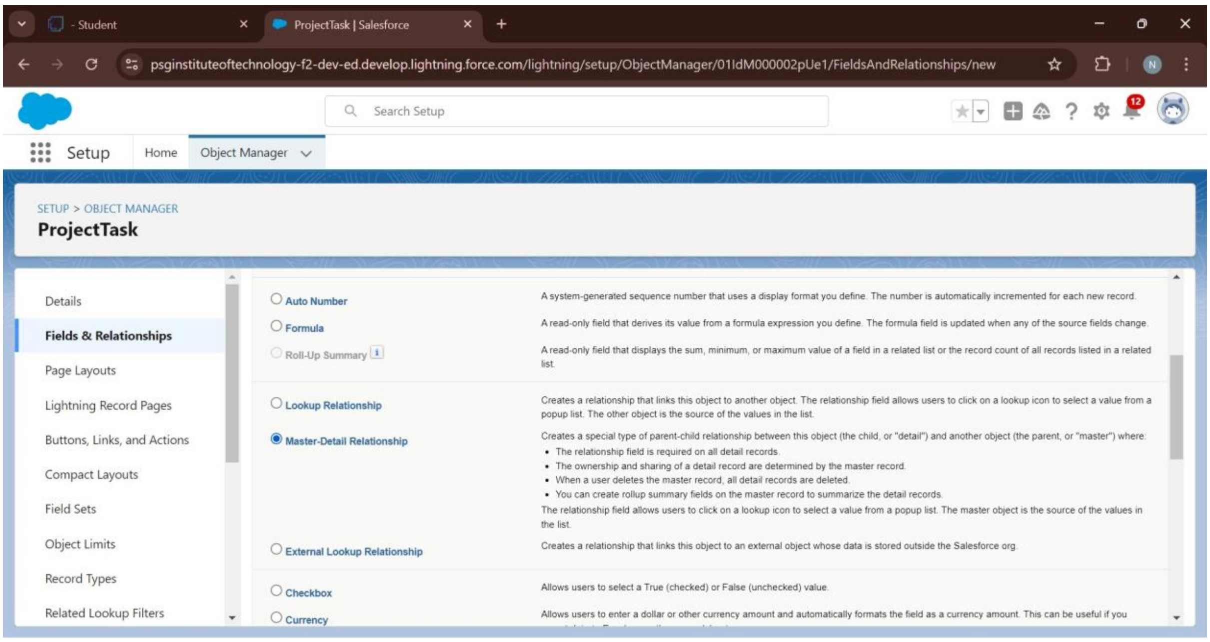
Object Limits
Record Types
Related Lookup Filters
Auto Number
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of 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.
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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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.
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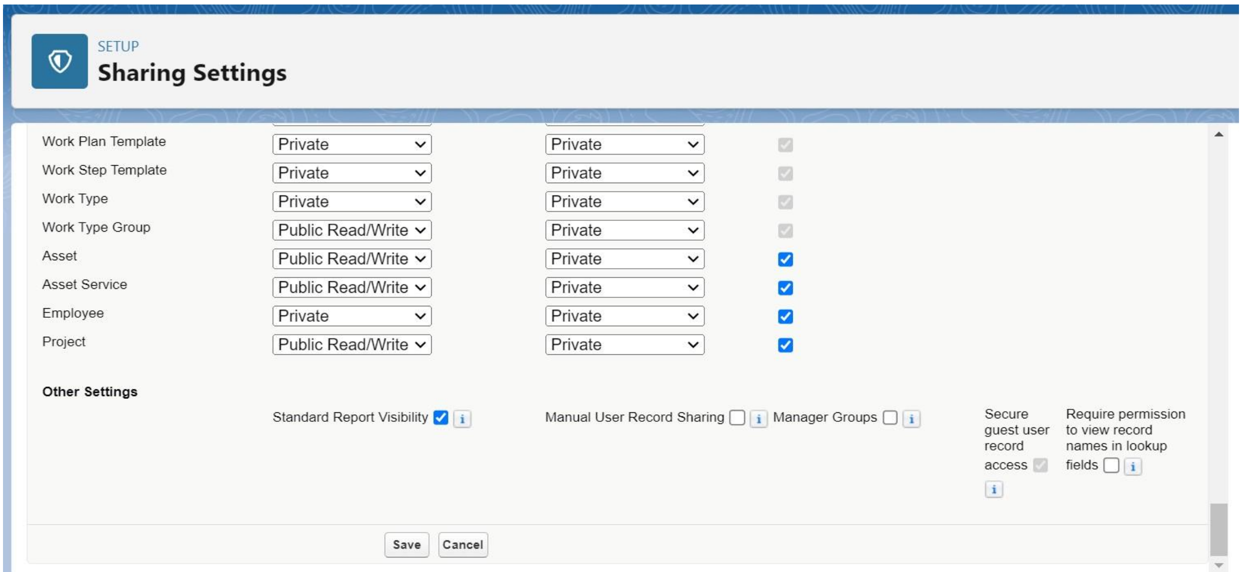
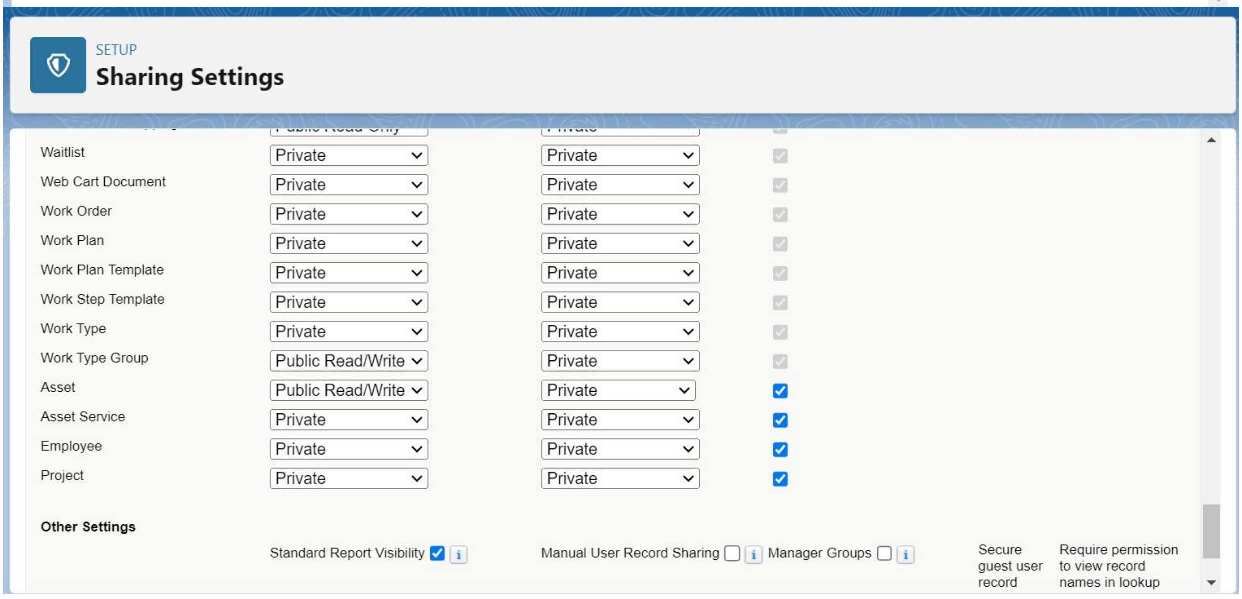
3. Setting OWD

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





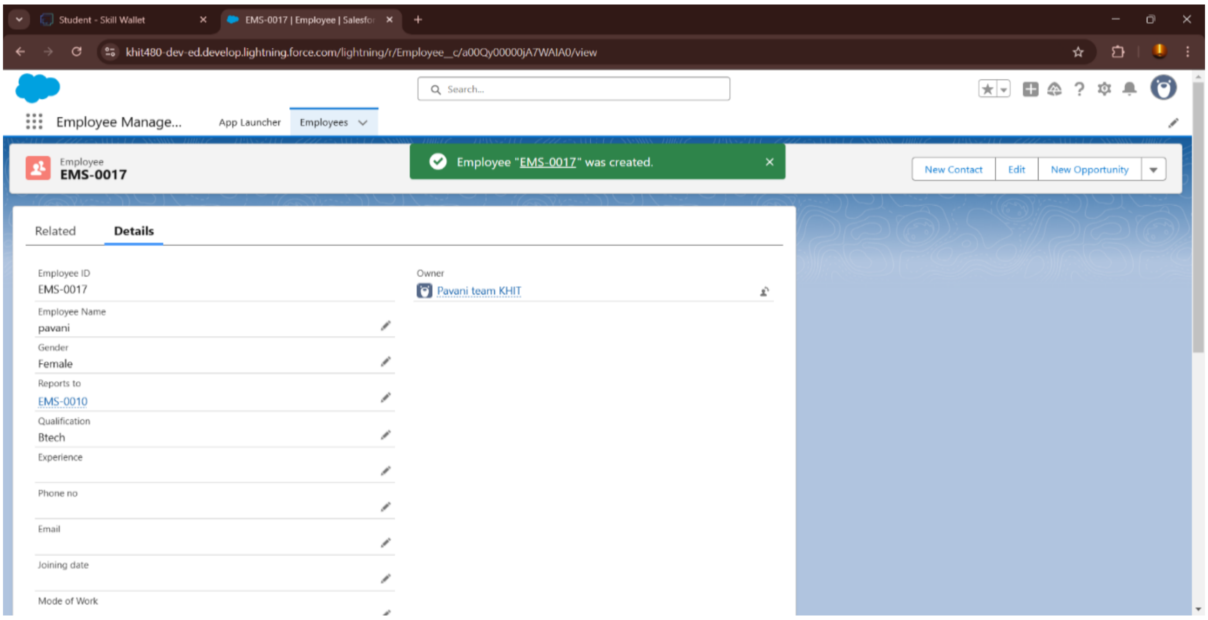
Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles, Role Hierarchy, Sales Teams, and Account groups, manual sharing, and so forth).

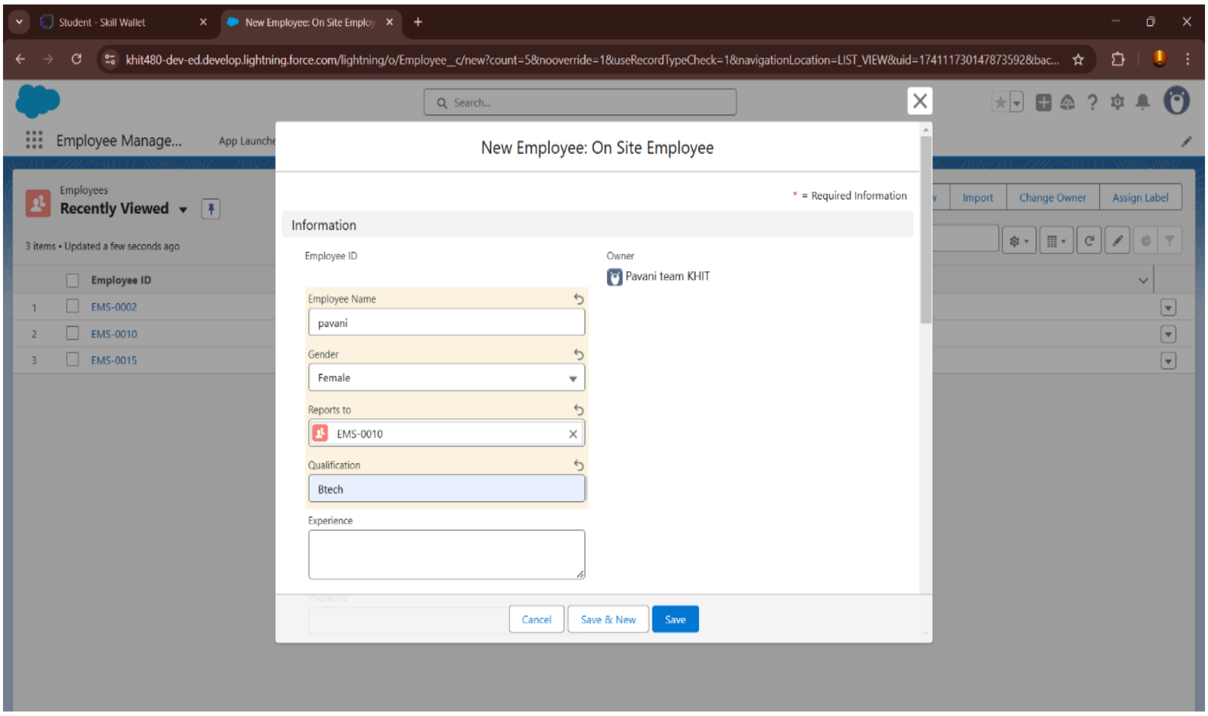
1.Public Read/Write/Transfer, 2. Public Read/Write, 3. Public Read/Only, 4. Private

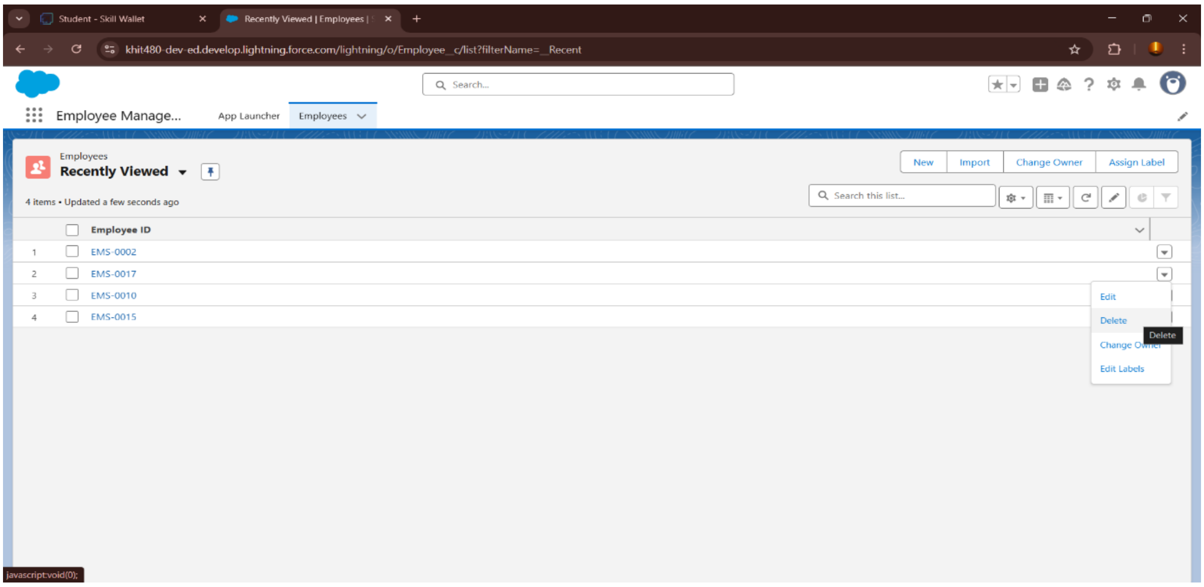
4. User Adoption

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

As a new Administrator, you perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuring data access, and much more.



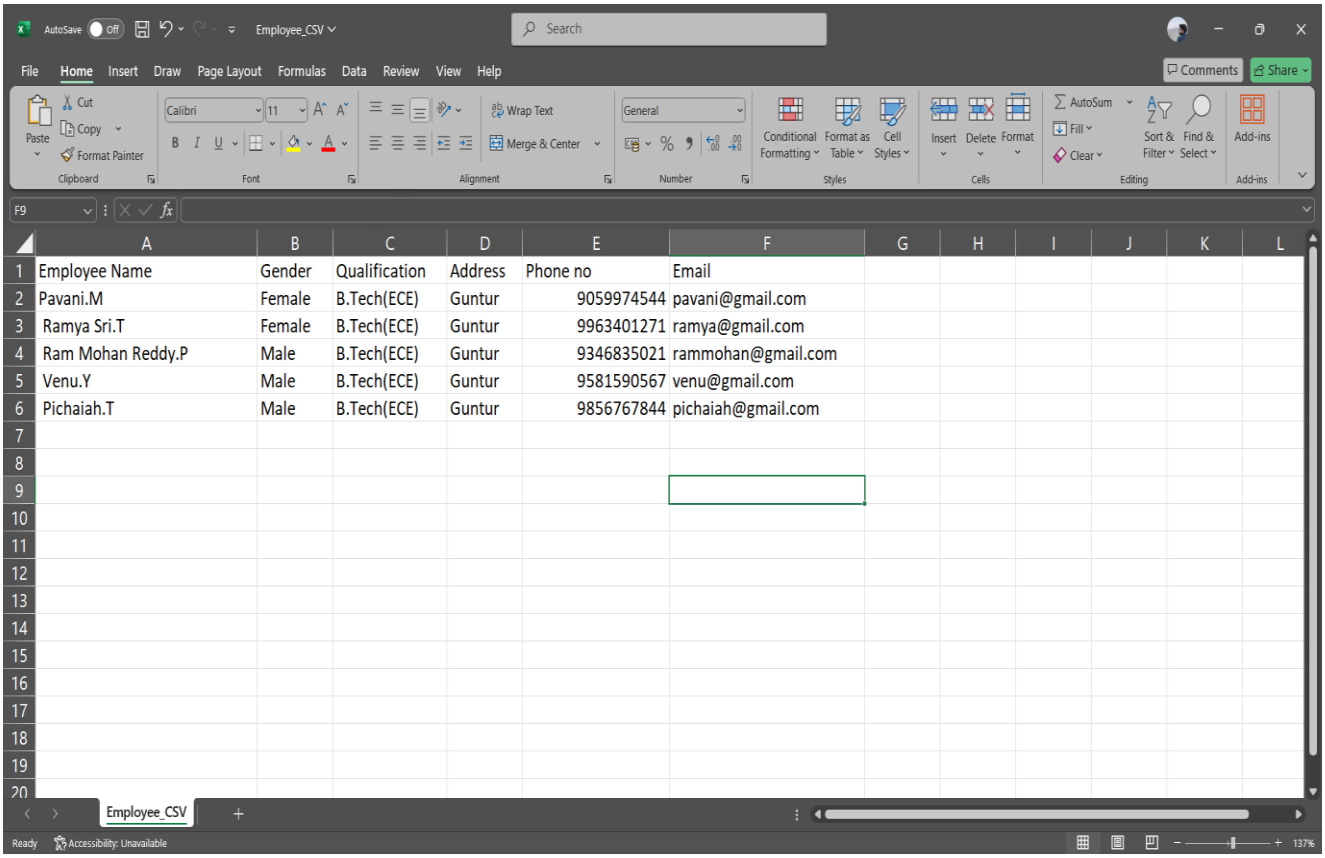




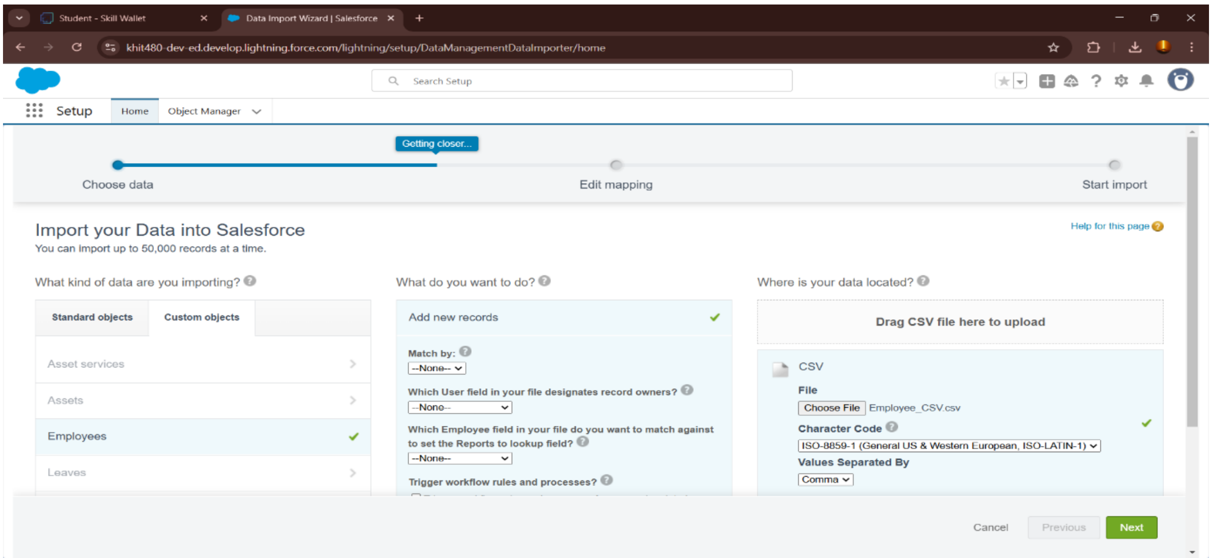
- Click on Arrow at right hand side on that Particular record.
- Click delete

5. Import Data

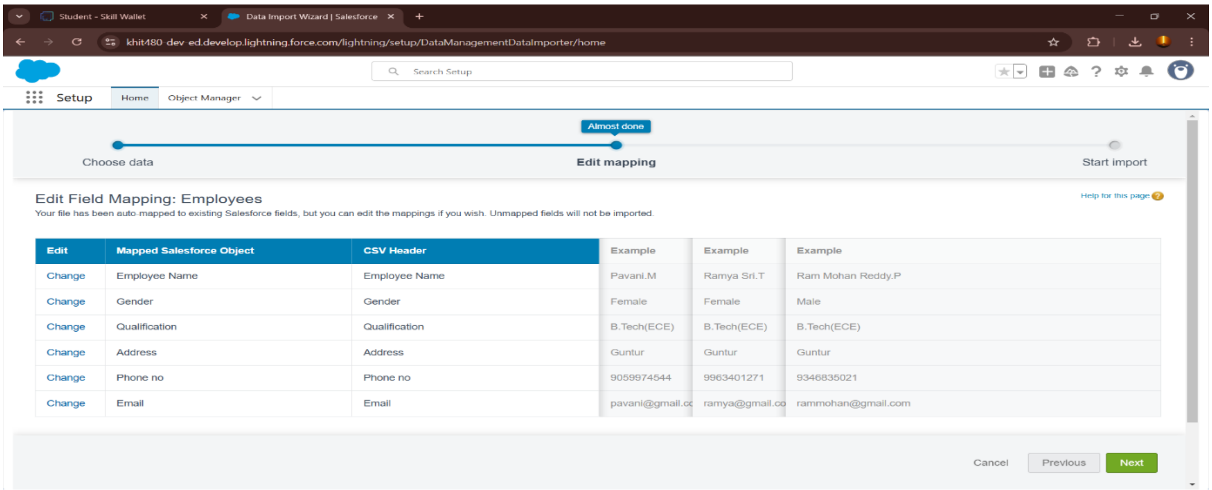
- First create your own collection of data in an excel sheet.



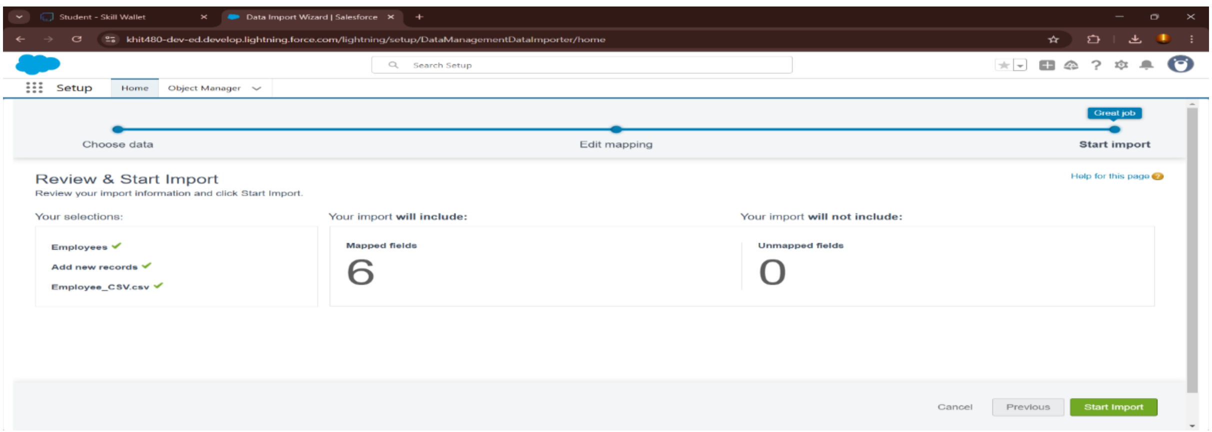
- Importing data using Data Wizard.
- Go to setup and search for Data Import Wizard.
- Click CSV and choose file Employee_CSV which we made earlier.



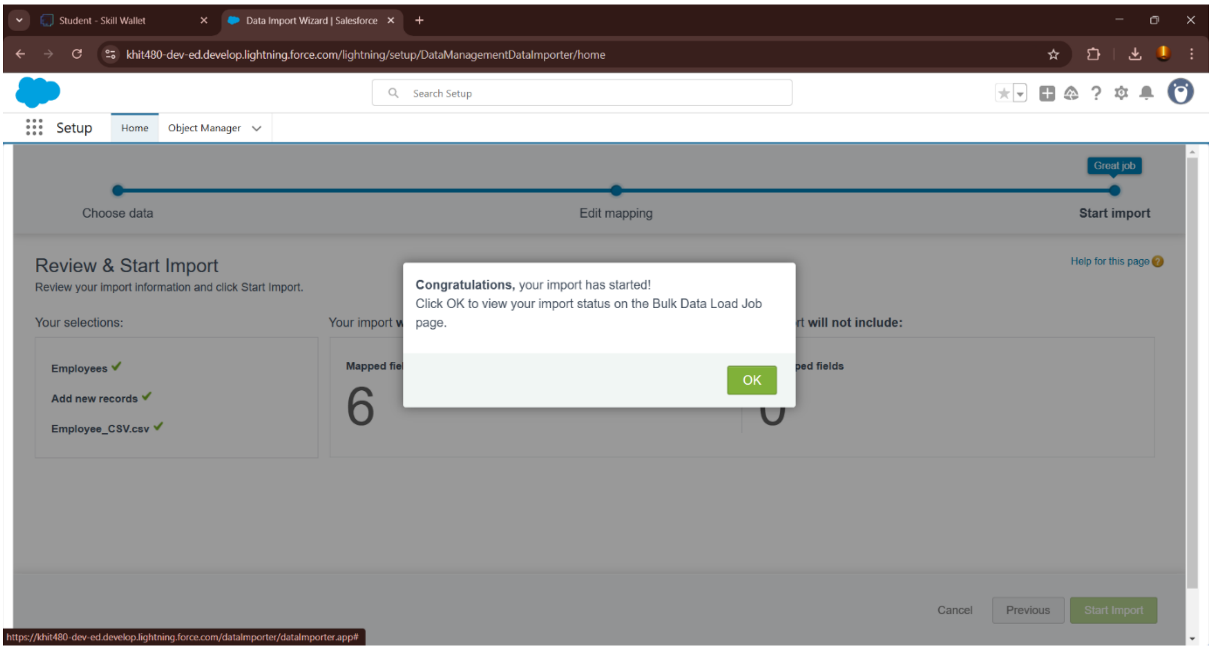
Since the field names in the CSV file are the same as the field names in your object, the fields are automatically mapped. Click Next.

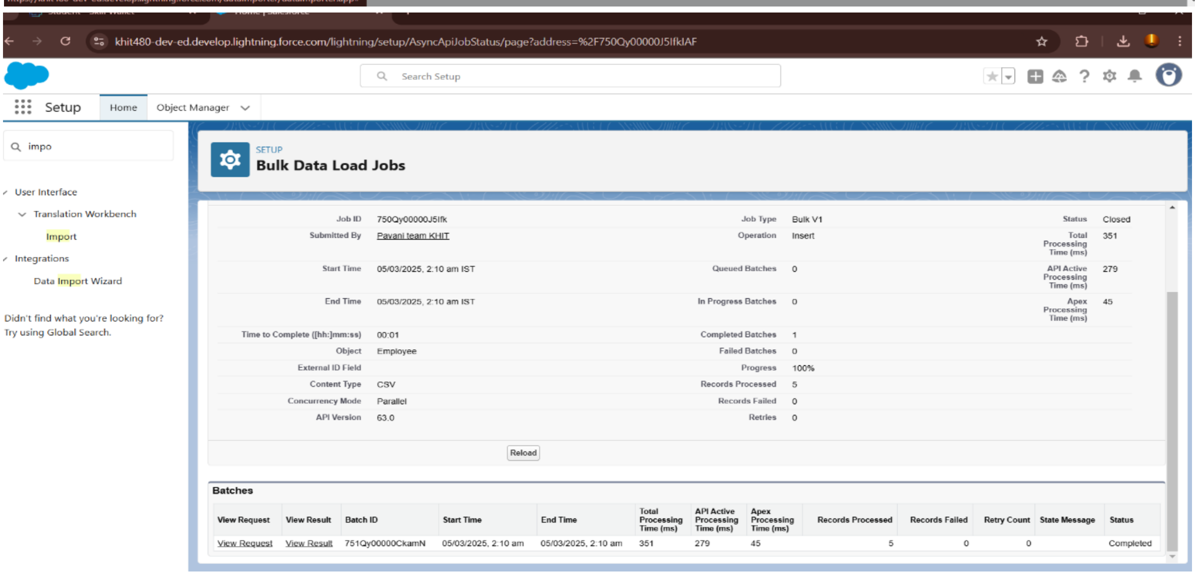


Click Start Import.



Click OK on the popup.





Make sure you have 0 records under the records failed column.

Data Import lets you upload data from external sources and combine it with data you collect via Analytics. You can then use Analytics to organize and analyze all of your data in ways that better reflect your business.

9.Profiles

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

1 Contract Manager

2 Read Only

3 Marketing User

4 Solutions Manager

5 Standard User

6 System Administrator.

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. Custom Profiles:

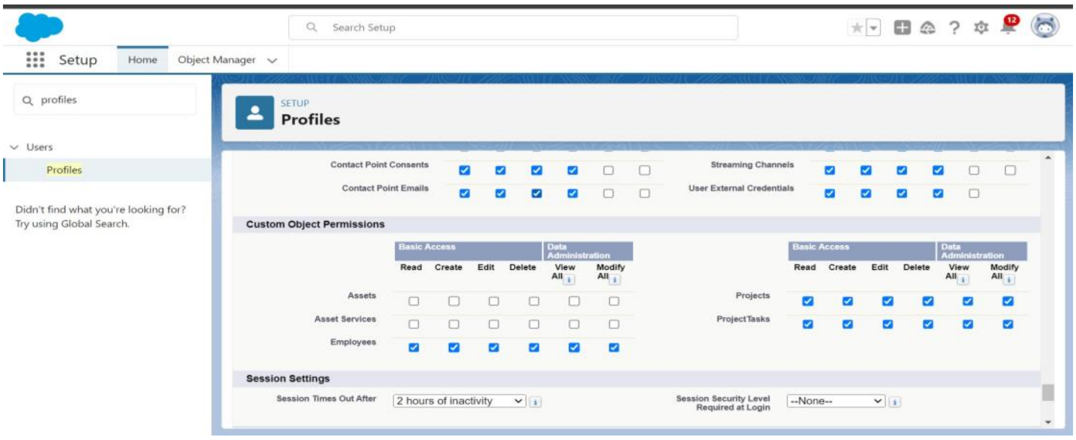
Custom ones defined by us.

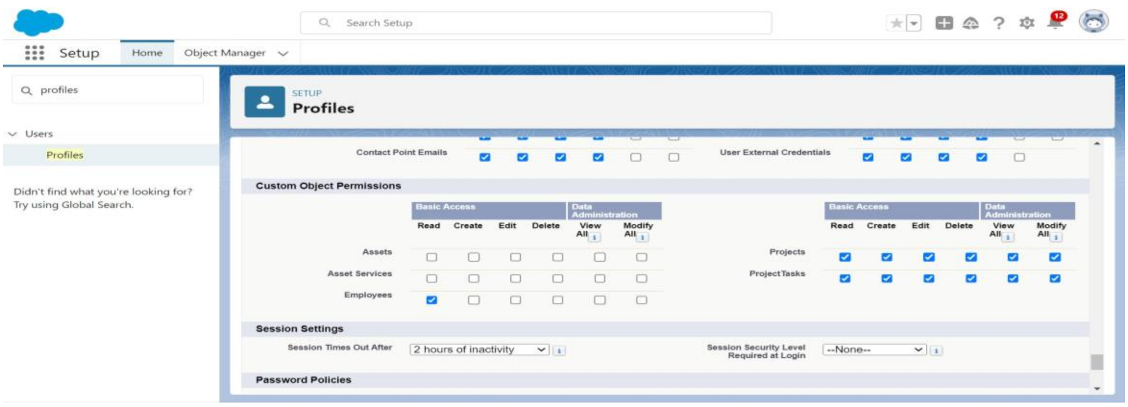
They can be deleted if there are no users assigned with that particular one.

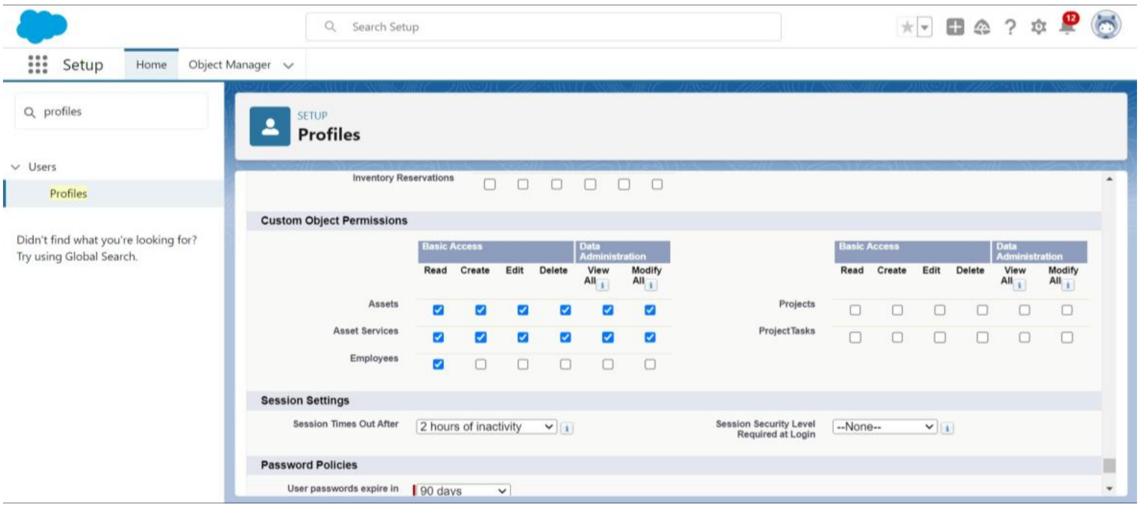
- HR Profile
  - Go to setup / type profiles in quick find box / click on profiles / clone the desired profile (Standard user) / enter profile name (HR) / Save.
  - While still on the profile page, then click Edit.
  - Scroll down to Custom Object Permissions and Give access permissions for Assets and Asset Services objects.
  - Scroll down and Click on Save.

- Manager Profile
  - Same as HR profile steps create manager profile cloning (Salesforce Platform User)and give permission access for Employee, Project and Project Task objects.

- Create Employee Profile
  - Create Employee Profiles for “On Site Employee”,”Remote Employee” as in Manager profile, but in this employee profile only allow permission access for Project and Project Task objects only.



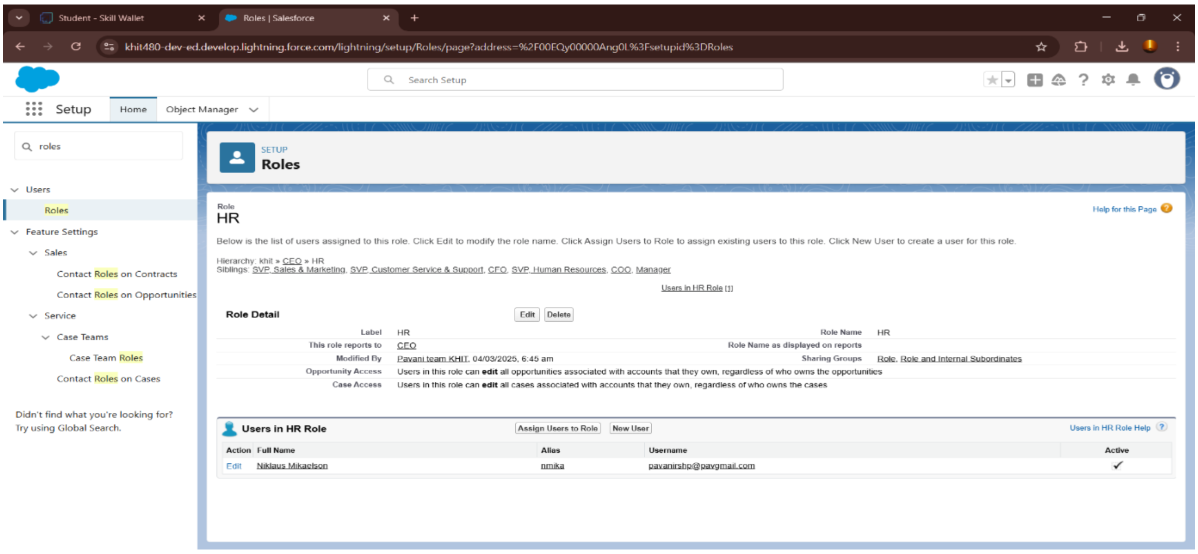




10. Roles

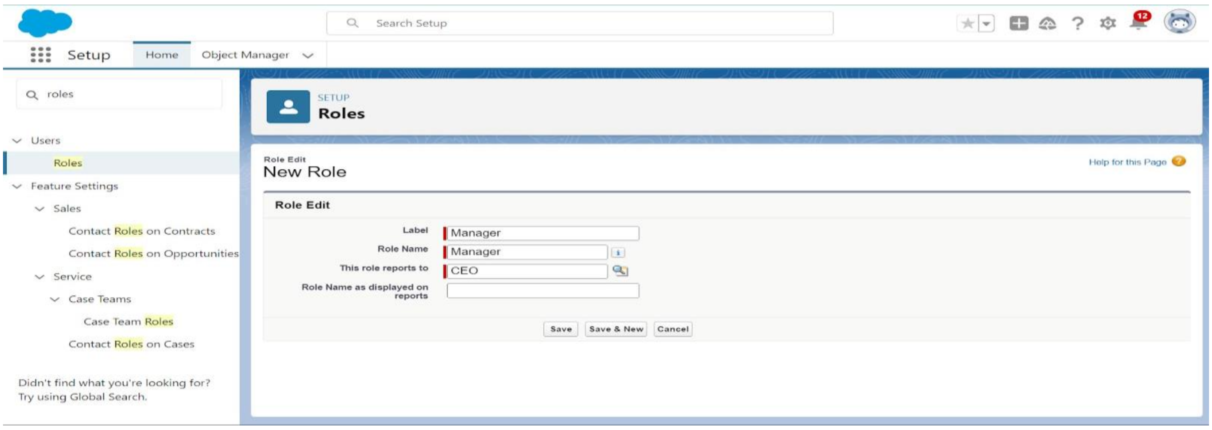
A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

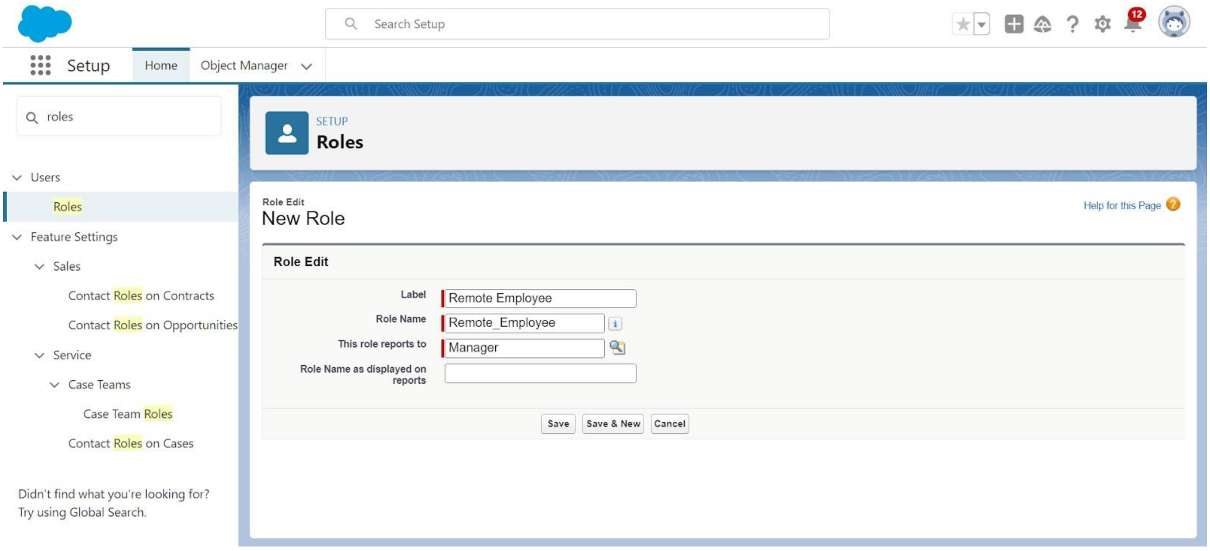
- Creating HR Role
- Go to quick find / Search for Roles / click on set up roles
- Click on Expand All and click on add role under whom this role works.
- Give Label as “HR” and Role name gets auto populated. Check to whom this role (HR) reports. Then click on Save.

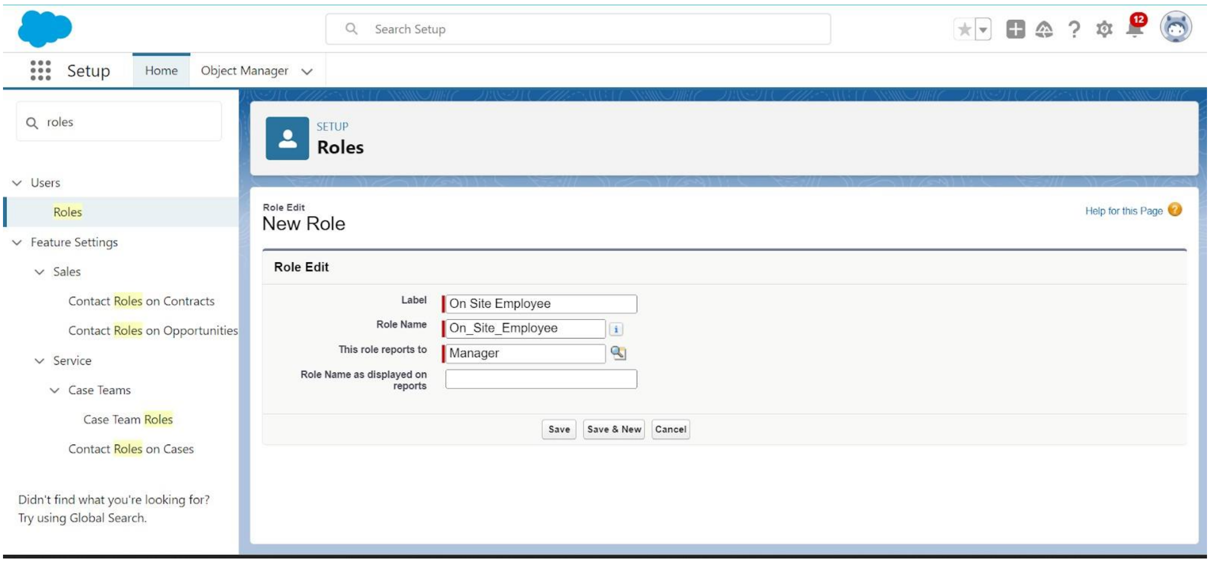


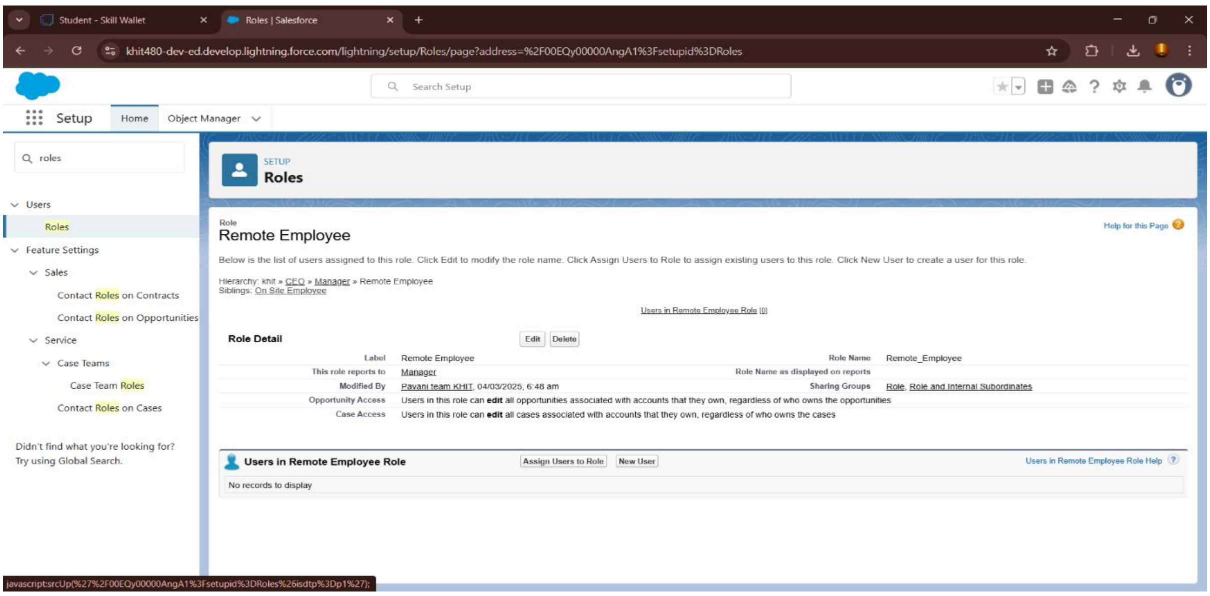
- Creating Various Roles

Create three more roles for Manager, On Site Employee, Remote Employee. On Site Employee and Remote Employee reports to Manager.




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

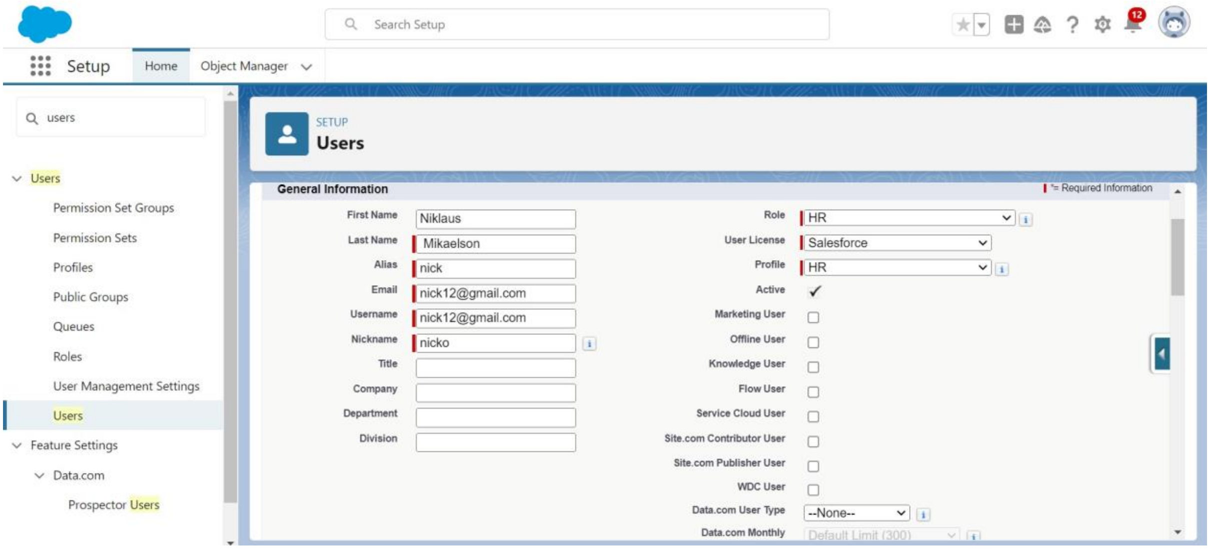

Student - Skill Wallet
Roles | Salesforce
khit480-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2F00EQy00000AngA1%3Fsetupid%3DRoles
Search Setup
Setup
Home
Object Manager
roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
Role
Remote Employee
Help for this Page
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: khit » CEO » Manager » Remote Employee
Siblings: On Site Employee
Users in Remote Employee Role [0]
Role Detail
Edit
Delete
Label
Remote Employee
Role Name
Remote_Employee
This role reports to
Manager
Role Name as displayed on reports
Modified By
Pavani team KHIT, 04/03/2025, 6:48 am
Sharing Groups
Role, Role and Internal Subordinates
Opportunity Access
Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access
Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases
Users in Remote Employee Role
Assign Users to Role
New User
Users in Remote Employee Role Help
No records to display
javascript:srcUp(%27%2F00EQy00000AngA1%3Fsetupid%3DRoles%26isdtp%3Dp1%27);

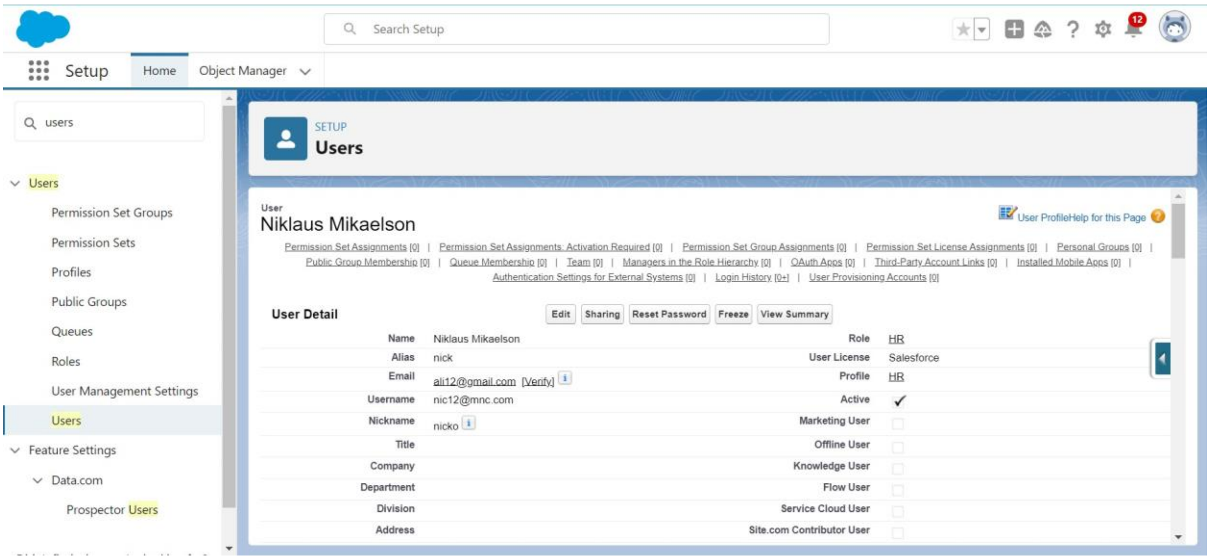
11. USERS

- Creating various users.

User1:-

  - First Name : Niklaus
  - Last Name : Mikaelson
    - Role : HR
    - User license: Salesforce
    - Profiles : HR





User2:-

1 First Name : Kol

2 Last Name : Mikaelson

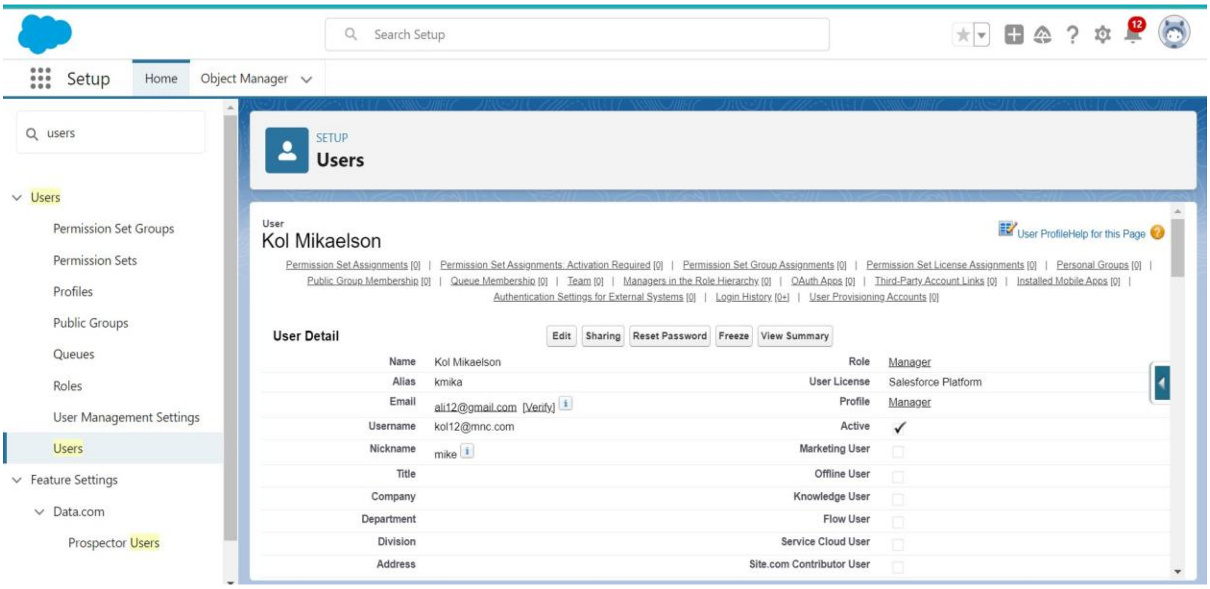
Role : Manager

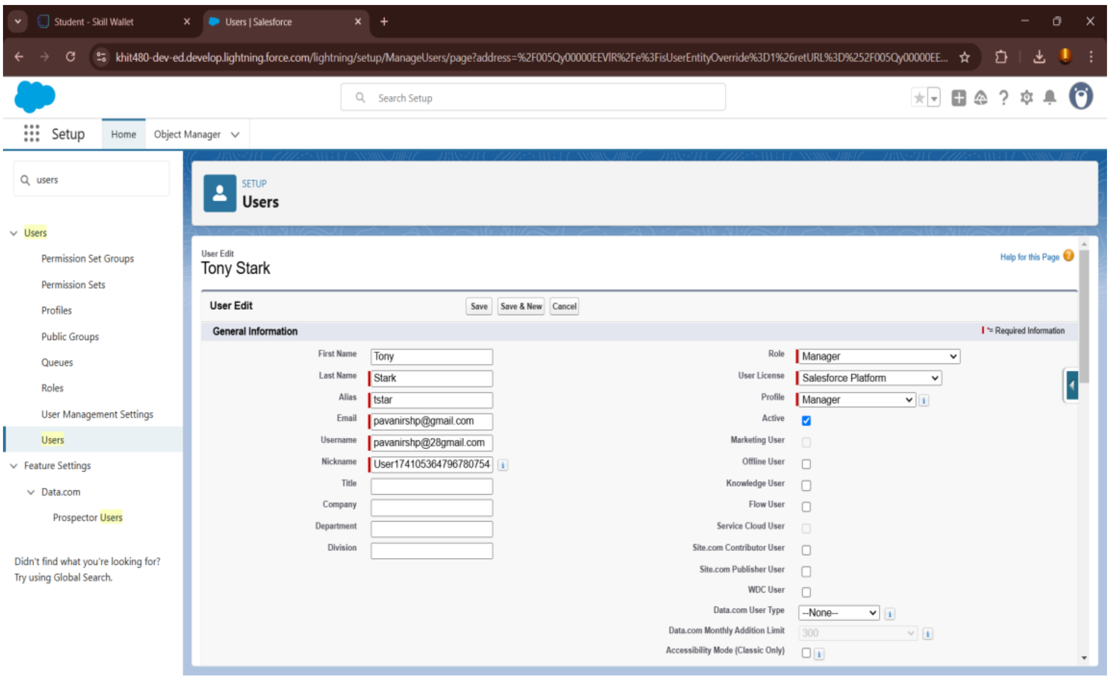
User license : Salesforce Platform

Profiles : Manager

User 3:-

Create your own user by following the same steps in user2.





12. Page Layouts

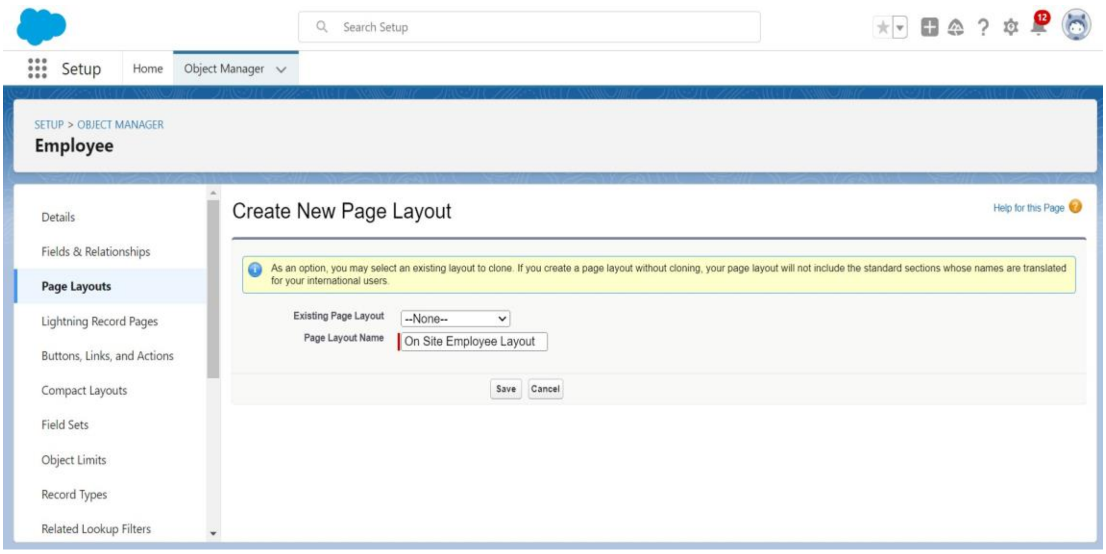
- Creating a page layout for Employee object
  - Go to Setup / Click on Object Manager /
  - Search for the object (Employee) / From drop down click on Edit.
  - Click on Page layout / Click on New.
  - Give Page layout Name as “On Site Employee Layout” and click on Save.

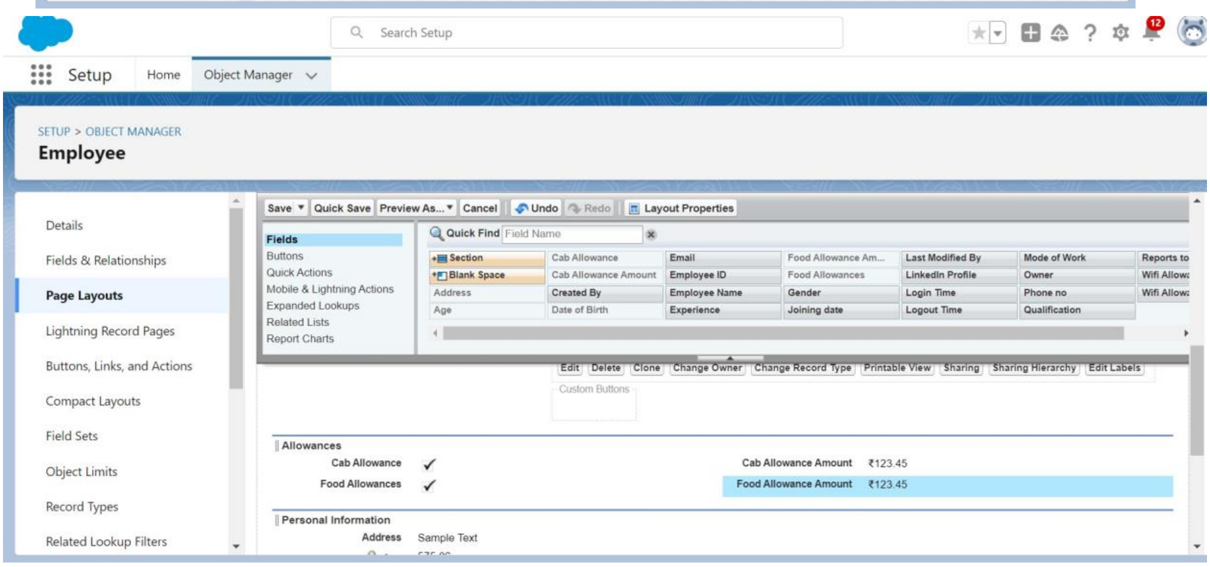
Drag and drop the Section from the highlight panel below the Information and name it as “Personal Information” and click Ok.

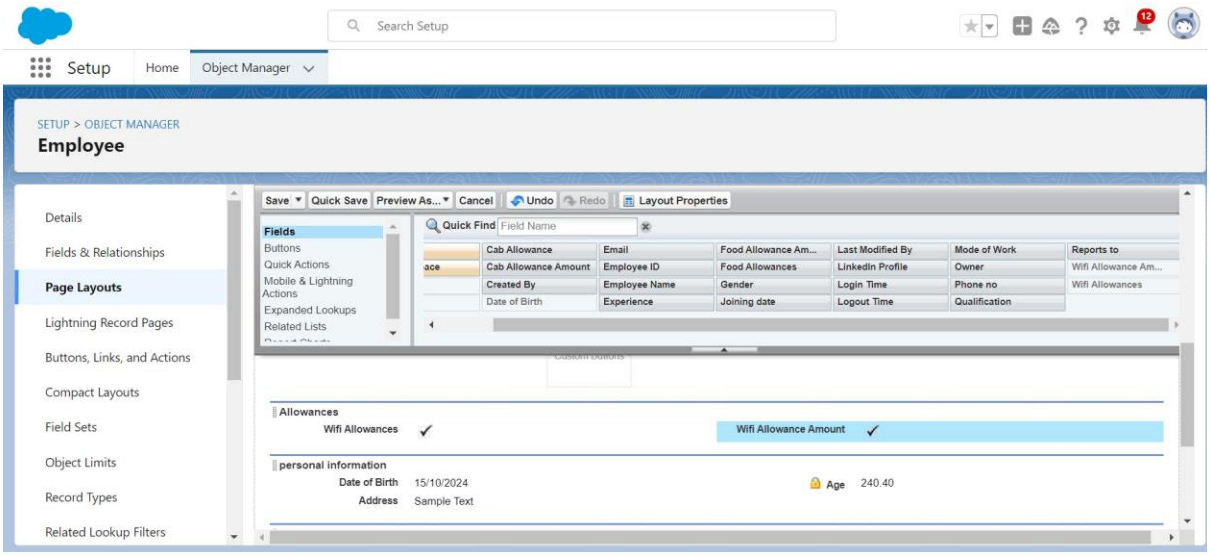
Drag Date of Birth, Address and Age fields from Employee Information to Personal Information section.

Similarly perform the above step to create “Allowances” and add allowances fields in it

- Creating another page layout
- Create another page layout and name it as “Remote Employee Layout”, and in the allowances section use only Wifi Allowance and Wifi Allowances Amount fields.







13. Chatter Groups

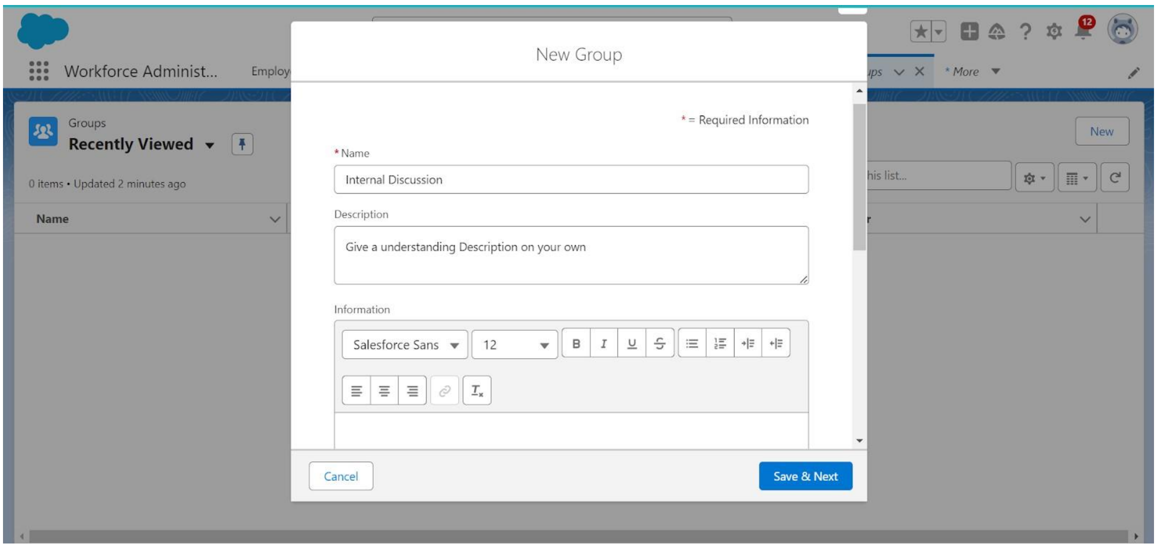
- Creating a chatter group for your organization.

To Create a chatter group:

Click the App Launcher.

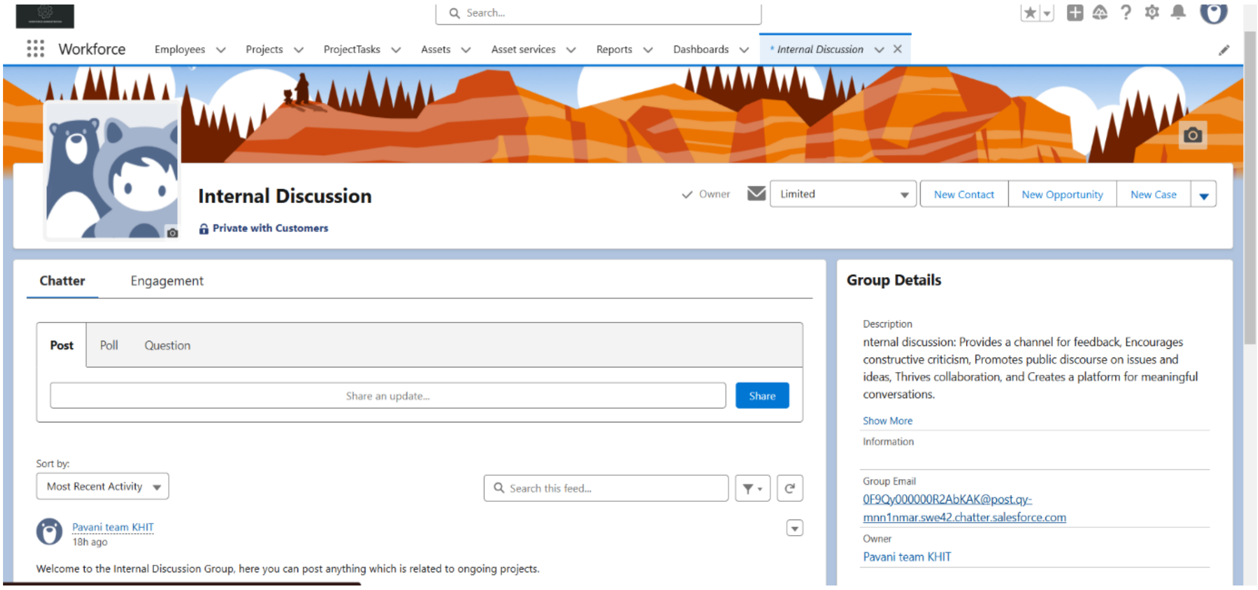
Enter Groups in the Search apps and items... box and select Groups.

	Field	Value
1	Group Name	Internal Discussion
2	Description	Give a understanding Description on your own
3	Access Type	Private
4	Allow Customers	Checked



5. Click Save & Next.

6. On the Manage Members screen, click Add next to users you created in the previous a done.



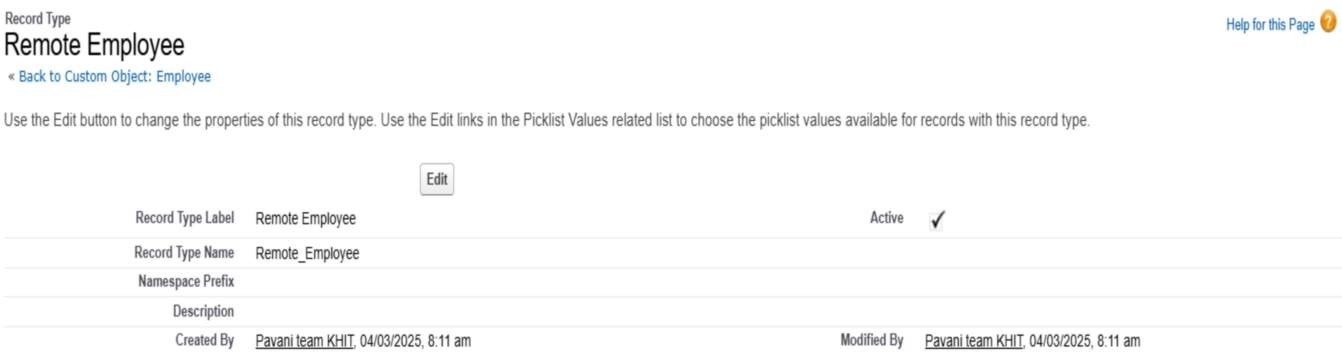
14. Record Types

- Creating On Site Employee Record Type

- Go to Setup / click on Object Manager / Search for the object (Employee) click Edit.
- From the left panel click Record Types click new.
- Give Record Type Label as “On Site Employee” and make it active.
- Uncheck for “Make Available”.
- Scroll down and check for the Manager & System Administrator profile and click on Next.
- Select “Apply a different layout for each profile”, and change page layout to On Site Employee Layout for manager profile and System Administrator. Click save.

- Creating "Remote Employee" Record type

Create another Record Type with name “Remote Employee” following On Site Employee. Use Remote Employee page layout for Remote Employee record type.

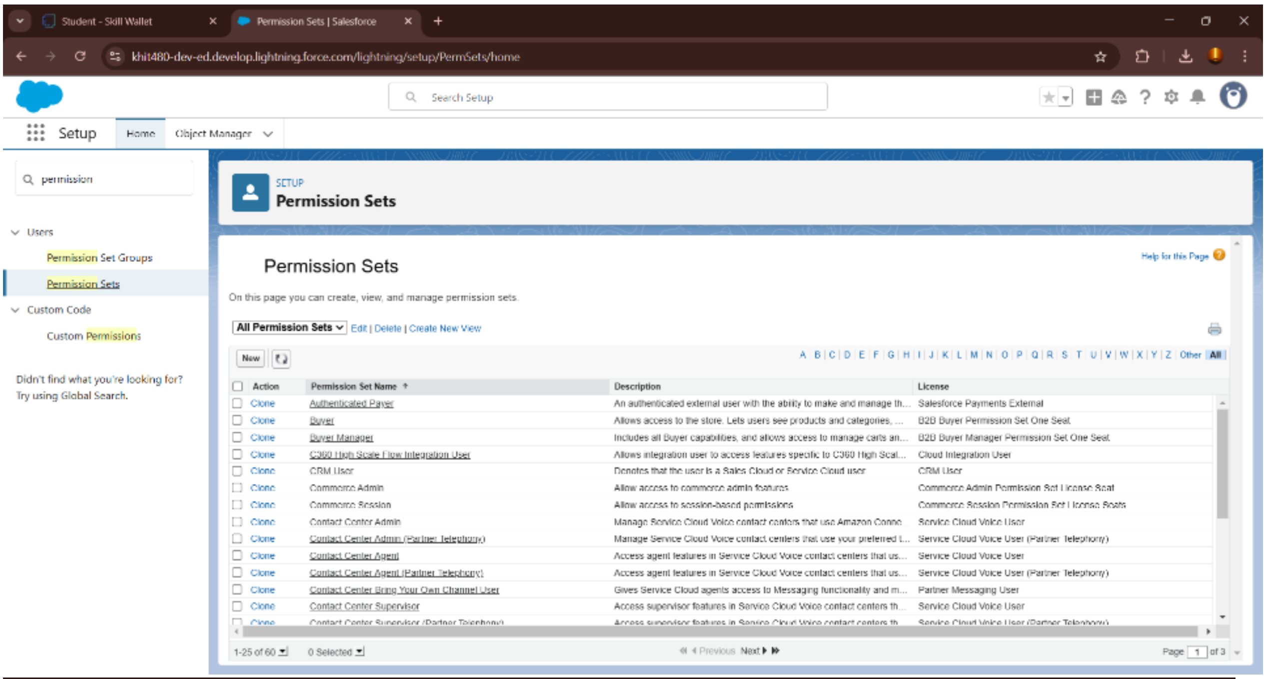
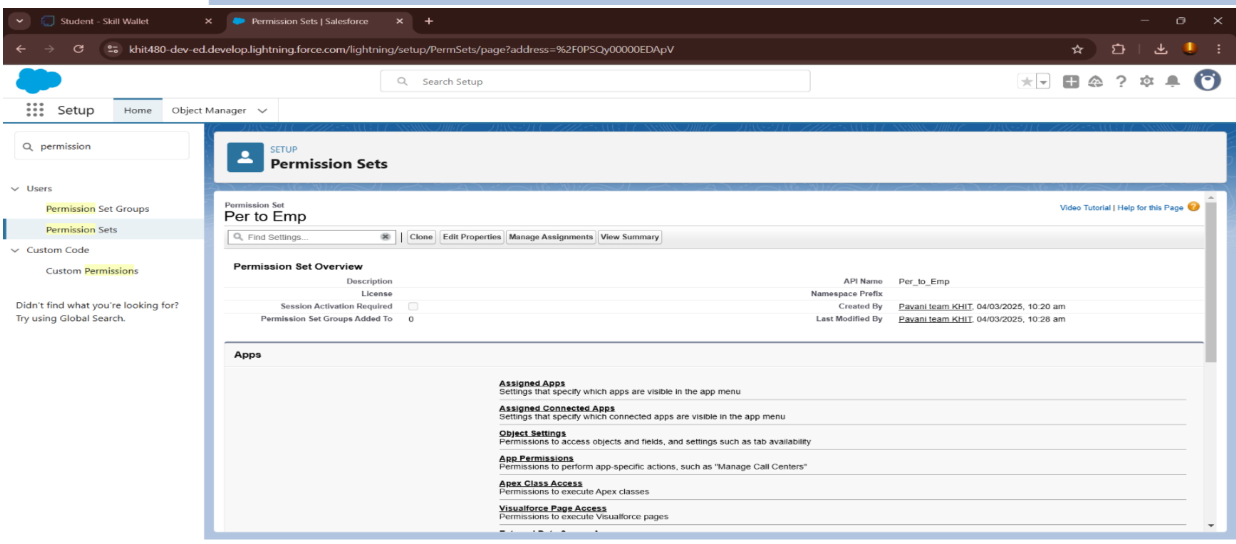
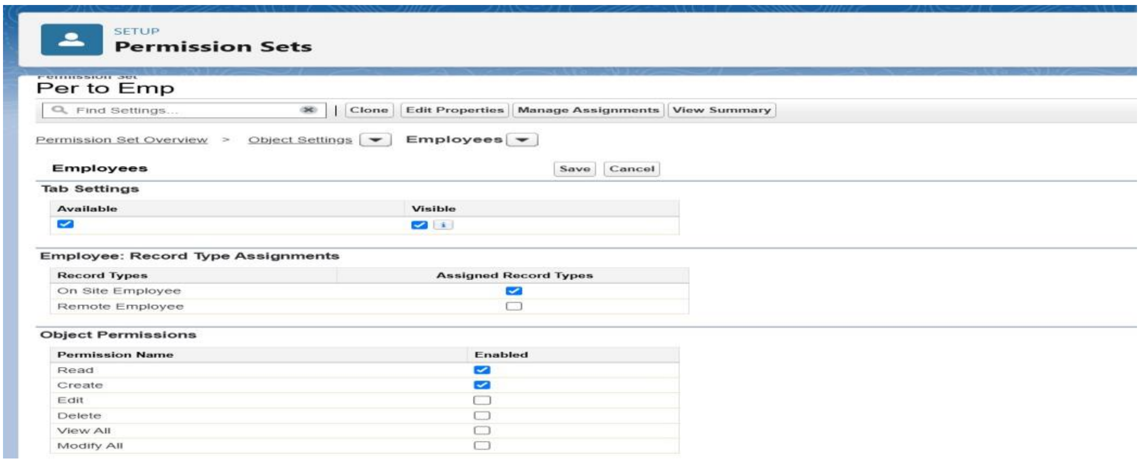


15. Permission sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

- Creating a permission set

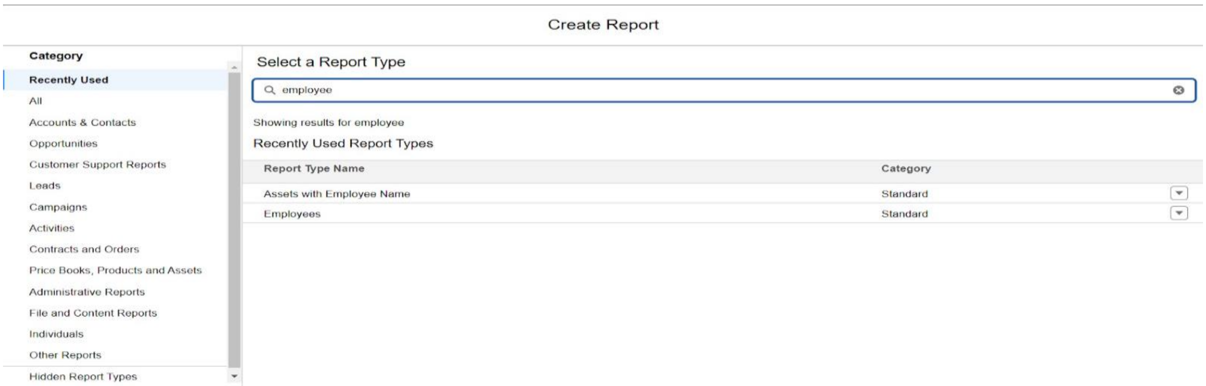
- Go to setup/ type “permission sets” in quick search/ select permission sets/ New.
- Enter the label name as “Per to Emp” Save. Under Apps Select object settings.
- Click on Employee object --> click on Edit --> under object permission check for read and create. Click on Save.

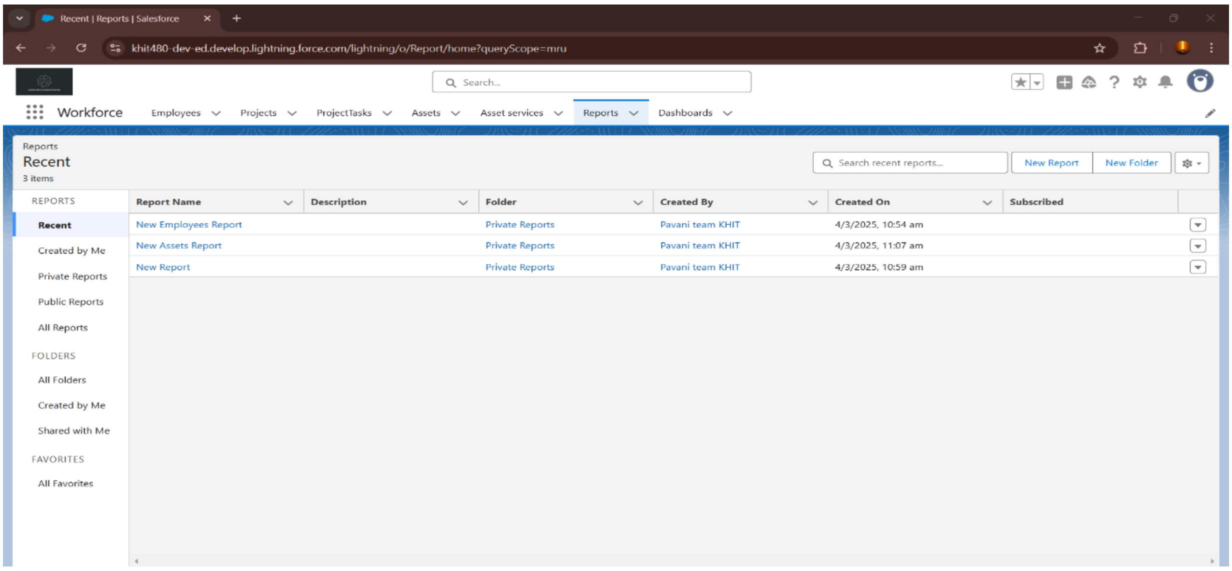

Permission Sets | Salesforce
khit480-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home
Setup
Home
Object Manager
permission
Users
Permission Set Groups
Permission Sets
Custom Code
Custom Permissions
Didn't find what you're looking for? Try using Global Search.
SETUP
Permission Sets
Permission Sets
On this page you can create, view, and manage permission sets.
All Permission Sets
Edit | Delete | Create New View
Action
Permission Set Name
Description
License
Clone Authenticated Payer An authenticated external user with the ability to make and manage th... Salesforce Payments External
Clone Buyer Allows access to the store. Lets users see products and categories, ... B2B Buyer Permission Set One Seat
Clone Buyer Manager Includes all Buyer capabilities, and allows access to manage carts an... B2B Buyer Manager Permission Set One Seat
Clone C360 High Scale Flow Integration User Allows integration user to access features specific to C360 High Scal... Cloud Integration User
Clone CRM User Denotes that the user is a Sales Cloud or Service Cloud user CRM User
Clone Commerce Admin Allow access to commerce admin features Commerce Admin Permission Set License Seat
Clone Commerce Session Allow access to session-based permissions Commerce Session Permission Set License Seats
Clone Contact Center Admin Manage Service Cloud Voice contact centers that use Amazon Conne... Service Cloud Voice User
Clone Contact Center Admin (Partner Telephony) Manage Service Cloud Voice contact centers that use your preferred t... Service Cloud Voice User (Partner Telephony)
Clone Contact Center Agent Access agent features in Service Cloud Voice contact centers that us... Service Cloud Voice User
Clone Contact Center Agent (Partner Telephony) Access agent features in Service Cloud Voice contact centers that us... Service Cloud Voice User (Partner Telephony)
Clone Contact Center Bring Your Own Channel User Gives Service Cloud agents access to Messaging functionality and m... Partner Messaging User
Clone Contact Center Supervisor Access supervisor features in Service Cloud Voice contact centers th... Service Cloud Voice User
1-25 of 60
0 Selected
Previous Next
Page 1 of 3

Permission Sets | Salesforce
khit480-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PSQy00000EDApV
Setup
Home
Object Manager
permission
Users
Permission Set Groups
Permission Sets
Custom Code
Custom Permissions
Didn't find what you're looking for? Try using Global Search.
SETUP
Permission Sets
Permission Set
Per to Emp
Video Tutorial | Help for this Page
Clone
Edit Properties
Manage Assignments
View Summary
Permission Set Overview
Description
License
Session Activation Required
Permission Set Groups Added To 0
API Name Per_to_Emp
Namespace Prefix
Created By Pavani team KHIT, 04/03/2025, 10:20 am
Last Modified By Pavani team KHIT, 04/03/2025, 10:28 am
Apps
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

SETUP
Permission Sets
Per to Emp
Find Settings...
Clone
Edit Properties
Manage Assignments
View Summary
Permission Set Overview > Object Settings Employees
Employees
Save
Cancel
Tab Settings
Available
Visible
Employee: Record Type Assignments
Record Types
Assigned Record Types
On Site Employee
Remote Employee
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
View All
Modify All

16. Reports And Dashboards ● Create Report

- Create 2 more Report

1. Go to the app / click on the reports tab
2. Click New Report. Select report type from category. click on start report.
3. Customize your report, Save or run it.



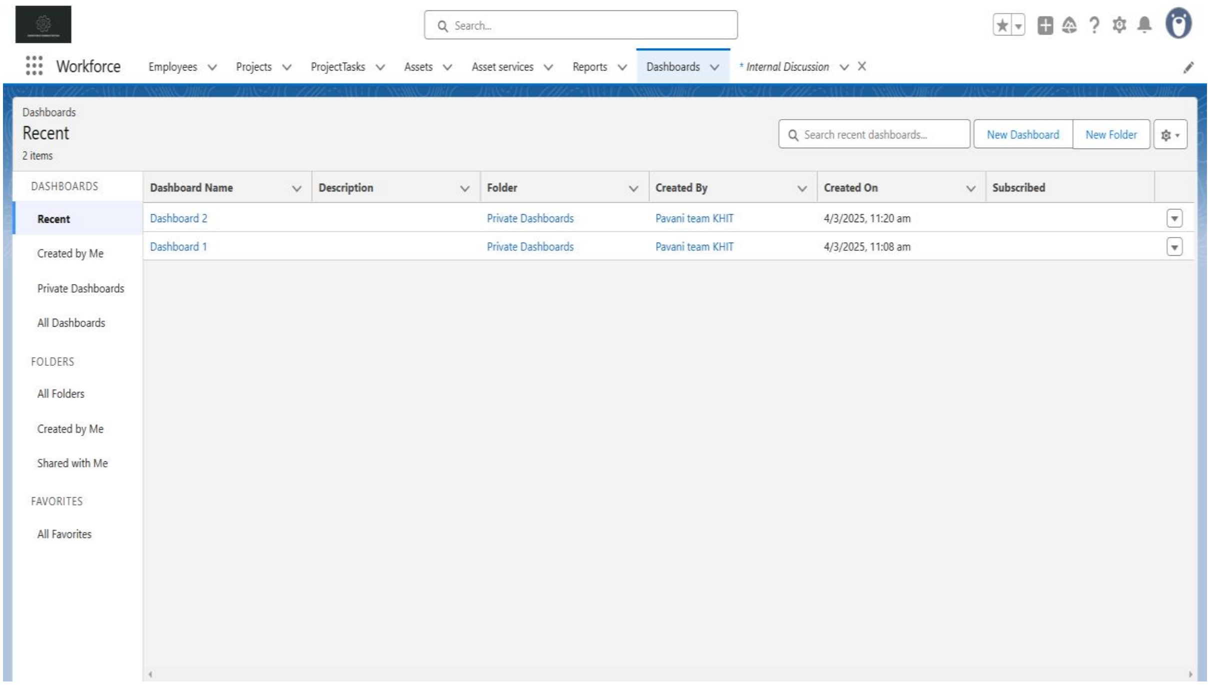


- Create Dashboard

- Go to the app/ click on the Dashboards tabs. Give a Name and click on Create.

- Select add component. Select a Report and click on select.

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



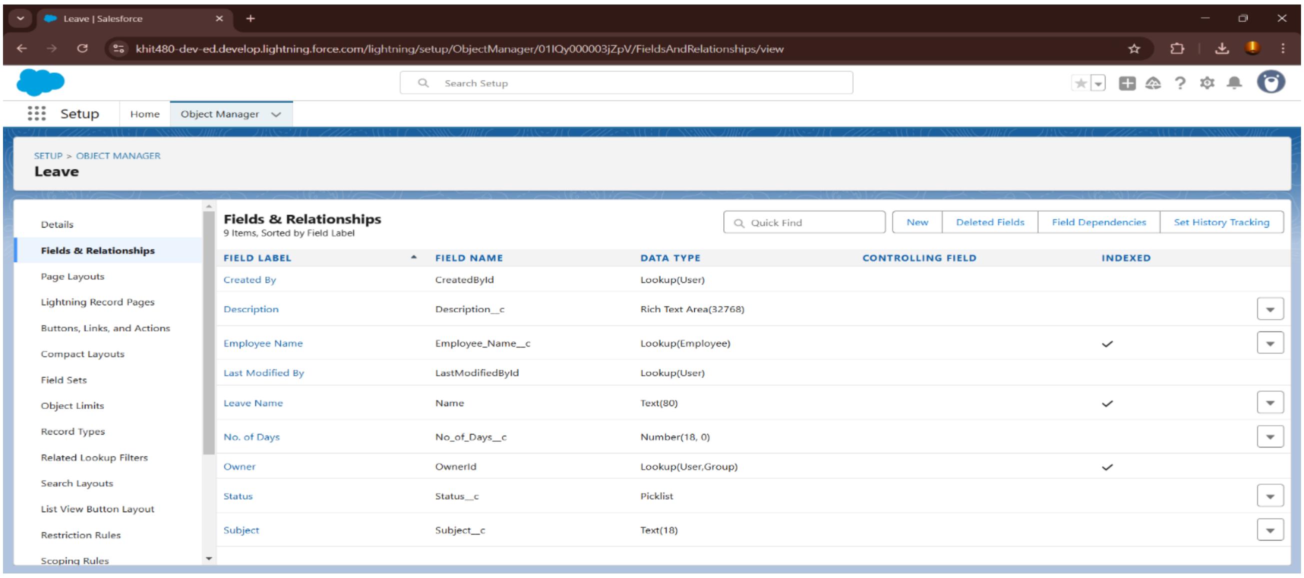
17.Approval Process:

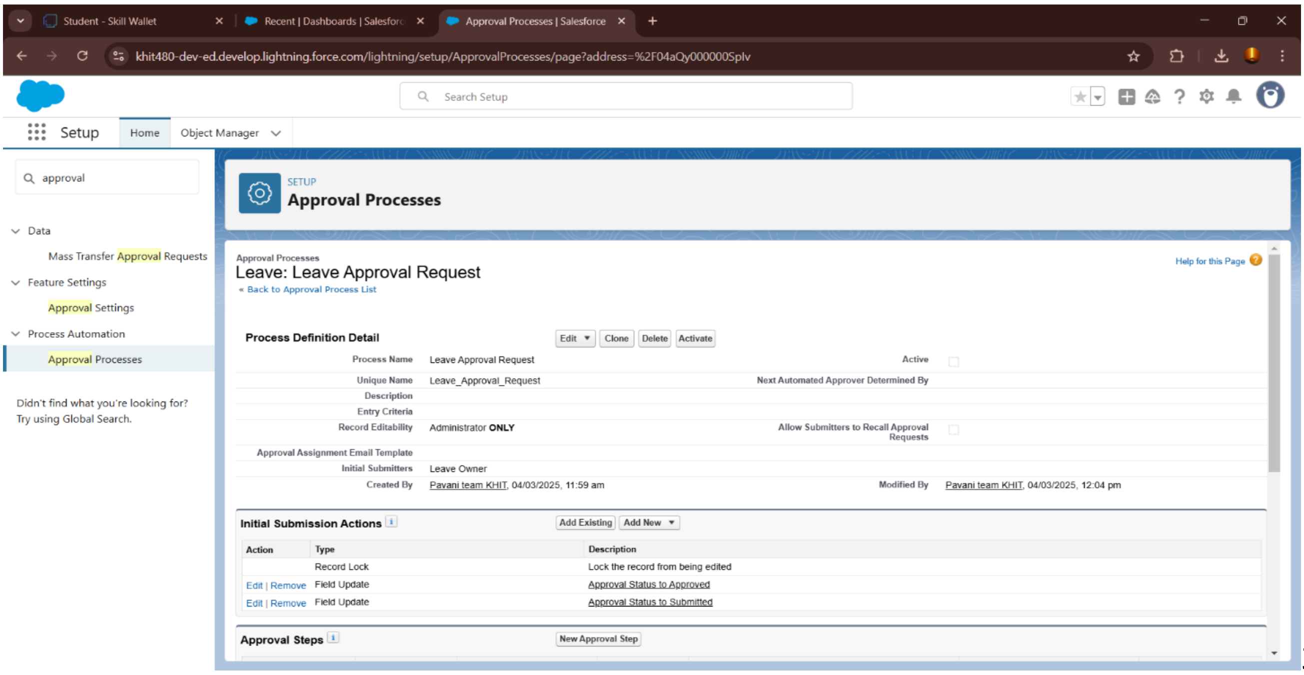
1.Create the leave object with the Employee Name, No. of Days, Subject, Description Status fields.

2.Create an Approval Process for Leave object.

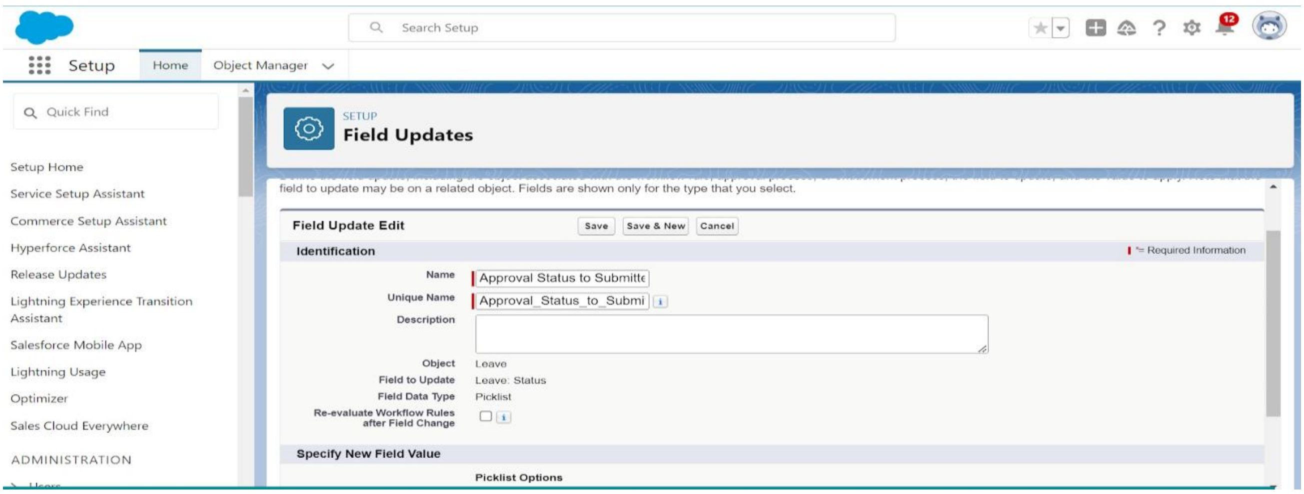
Name: Leave Approval Request

Select Approver: select Automatically assign to approver(s) and for users select the name of the user with the Manager role.





3.Initial Submission Action: Give name as “Approval Status to Submitted”.



4. Approval Steps: Under approval steps click the new approval step.

Give the name as “Approval from HR”

5. Final Approval Action: Give name as “Approval Status to Approved”.

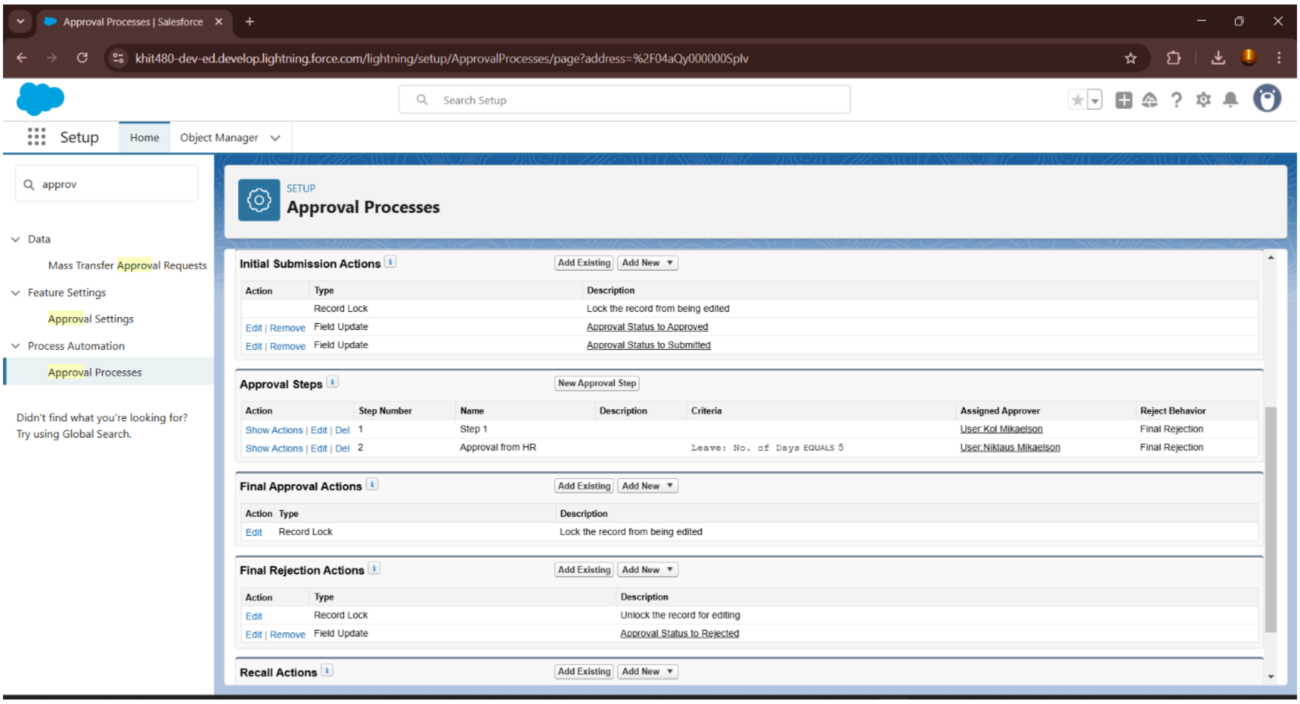
Select Status for the field to update.

Under specify new field select “A specific value” and select Approved and click Save.

6. Final Rejection Action: Give name as “Approval Status to Rejected”.

Select Status for the field to update.

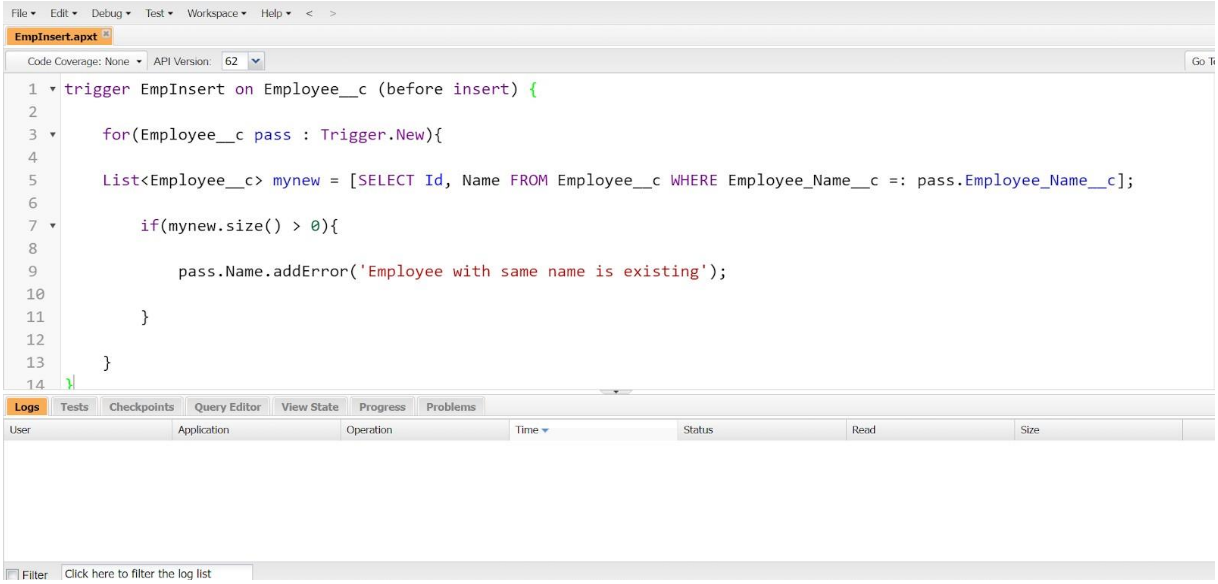
Under specify new field select “A specific value” and select Rejected and click Save.



18.Create an Apex Trigger

- To create a new Apex Trigger go to Developer Console:
  Click on the file / New / Apex Trigger.
- Give the Apex Trigger name as “EmpInsert”, and select “Employee__c” from the dropdown for sObject.
- Click Submit.

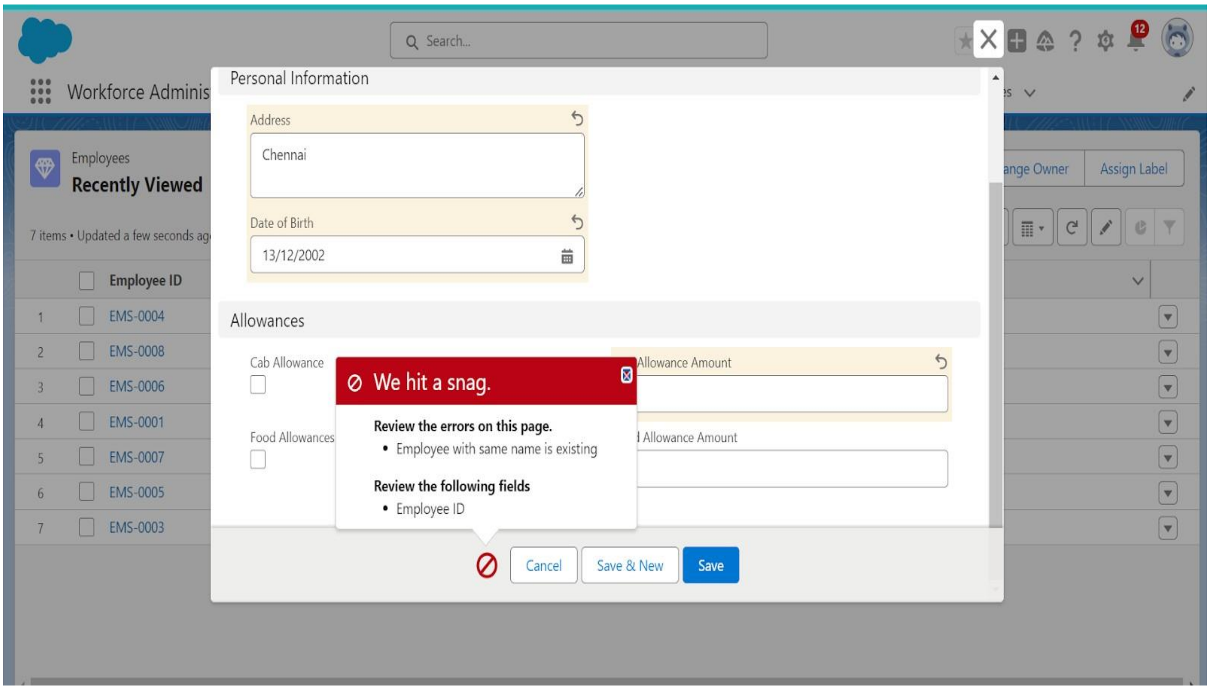
Write the code.



- Save the code.

❖ Testing The Trigger

- Try to create a record with the existing Employee Name say “Tony Stark” you’ll face the error while saving the record saying “Employee with same name is existing”.



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.