

# Certification Management System

## Business Use Case

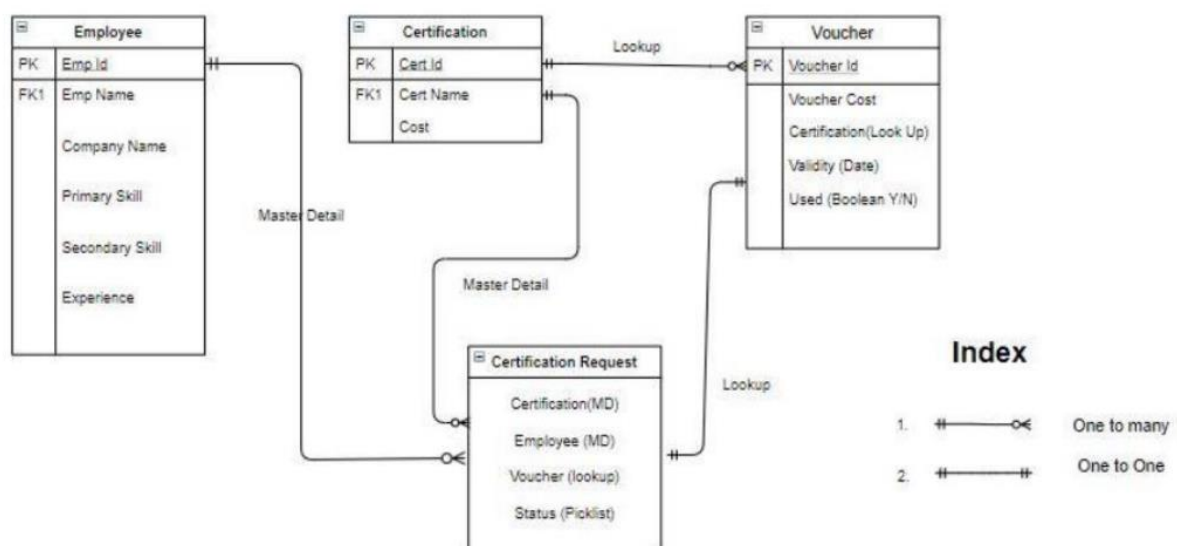
Orange Cloud Consulting is an IT services provider. They have recently won deals to implement multiple Salesforce projects. Even though Orange Cloud Consulting has got enough manpower to deliver these projects; their Salesforce Practice Lead has insisted that, to demonstrate to the customers that we have quality in the manpower to be working on these projects, all the associates of Orange Cloud Consulting who are going to work on these projects should mandatorily have at least 1 Salesforce certification.

Orange Cloud Consulting has procured certification vouchers in bulk and plans to issue it to its employees. But since there would be so many vouchers procured and distributed; it is becoming a hard for Mariam and her team, who has been given the task of issuing these vouchers, to track this effectively using a simple excel sheet. It has been decided to use an App built on the Salesforce platform to make it easy for Mariam's team to effectively do this job.

## Application Objective

The Certification Management app should be able to keep information on vouchers. It should also be able to track who a voucher is getting issued to. Over and above this, validations need to be in place so that an employee does not get more than 1 voucher at a time. If an employee does not complete a certification in a set amount of time, then the app should send reminders. It should also be able to provide effective reporting.

## ERD



## Types of Users

**System Administrator:** you

**App Admin:** This is a user who is responsible for adding, editing & deleting Employees, Certifications, and Vouchers. They should be able to see all records.

**App User:** This is Mariam's team of users whose job it is to issue vouchers for requests that come through. This team consists of Mariam herself as the lead. She has 2 executives who help her with this job. The executives should only be able to work on the Certification Request records that are assigned to them. Mariam should be able to work on hers as well as both the executives records. So such App Users can only create, edit or delete Certification Requests that they own. Prevent app users from Creating, Editing or Deleting any other records apart from Certification Requests.

## Use Cases

- 1) Orange Cloud Consulting is split into 5 Business Units, each managing projects in a region. These are North America, South America, Europe, Asia, Oceania. Each of these BUs has one or more BU Leads. Use appropriate standard objects to hold the BU and BU Lead information. Each Employee belongs to any one of the above BUs. Ensure your data model caters for this.
- 2) Upon receipt of email intimations from Mariam, the App Admin loads Employees, Certifications or Vouchers in bulk. Mariam sends this data as a CSV attachment in her emails. *[Guideline for implementation: use any mechanism that Salesforce provides to import above 3 data sets in bulk].*
- 3) When an employee emails Mairam with a Certification Request, this email should automatically get created as a Case assigned to Mariam. Mariam then assigns the Case to one of the other App users. The App User creates the Certification Request and then closes the Case.
- 4) An app user should be able to create one or more Certification Requests for any Employee manually. Each Request can be in any one of these Statuses: Pending, Approved, Rejected, Passed, Failed.
- 5) On every Employee record, users should be able to see the number of Requests in the Passed status and the number of Requests in the Failed status.
- 6) If there is even one Certification Request existing in the system for an Employee already which is in an Approved state then prevent addition of any Certification Requests for that Employee. Only if there are prior Certification Requests for that Employee in Pending, Rejected, Passed or Failed status then allow for addition of a new Certification Request.
- 7) Voucher Id should be exactly 10 characters long and unique.

- 8) Employee should get notified over email when their Certification Request is created, Rejected or Approved (note: any Certification Request record should get created in Pending status by default. Status is mandatory).
- 9) App User submitted Certification request should automatically go to the App Admin for approval.
- 10) On Approval, a Voucher with the earliest validity date should get automatically assigned to the Certification Request. Status of the Certification Request should become Approved. The used flag on the Voucher should become checked.

If no vouchers are available, then the Certification Request should remain in Approved status. Later whenever Vouchers get added (either manually or by bulk upload), then these should get assigned to the Certification Requests in the order of first come first serve basis of the Certification Requests. The used flag of allocated vouchers should become checked.

- 11) Ensure that one Voucher is assigned to a Certification Request only once.
- 12) App Admins should have the ability to manually assign a Voucher to a Certification Request. But an App User should not be able to assign a Voucher manually to a Certification Request.
- 13) Once Due Date (*ensure this field is created*) on a Certification Request has passed and the status is not yet either Passed or Failed, the Employee should get a notification every day with CC to App User asking the Employee to share the status of the Certification Request.
- 14) If an employee gets Passed/Failed in any Certification, then the system should not allow to App User to raise same certification request for that employee again.
- 15) Report to show how many employees are passed or failed in last 1-month shown certification name wise.
- 16) Report to show how many active vouchers are available which are not assigned to anyone in last 1-month shown certification name wise.
- 17) Report to show how many certified employees are there in Orange Cloud Consulting.
- 18) Dashboard that has the above-mentioned reports.
- 19) The App should have a Home Page that should show any Items to Approve, Recently Viewed Certification Requests, Report in donut chart format that shows the Certifications across the number of Employees who have passed it. This Home Page should also have a Screen Flow using which an App Admin can manually select a Certification Request and assign a Voucher to it.
- 20) Ensure that **overall** test class coverage is over 95%. Test classes should have positive and negative test scenarios.