
Workforce Administration Solution (Dev)

-SalesForce

Hardware Required:

System with advance configuration

Software Required:

Salesforce Platform

System Required:

Good Configuration

Workforce Administration Solution is a software application or platform designed to streamline and automate various aspects of employee's working on projects and Asset Assignment processes within an organization. It serves as a centralized system for managing employee data, number of projects an employee is working on, tracking employee performance, and keeping record for the assets which they are assigned to.

Submitted by

au711221104023

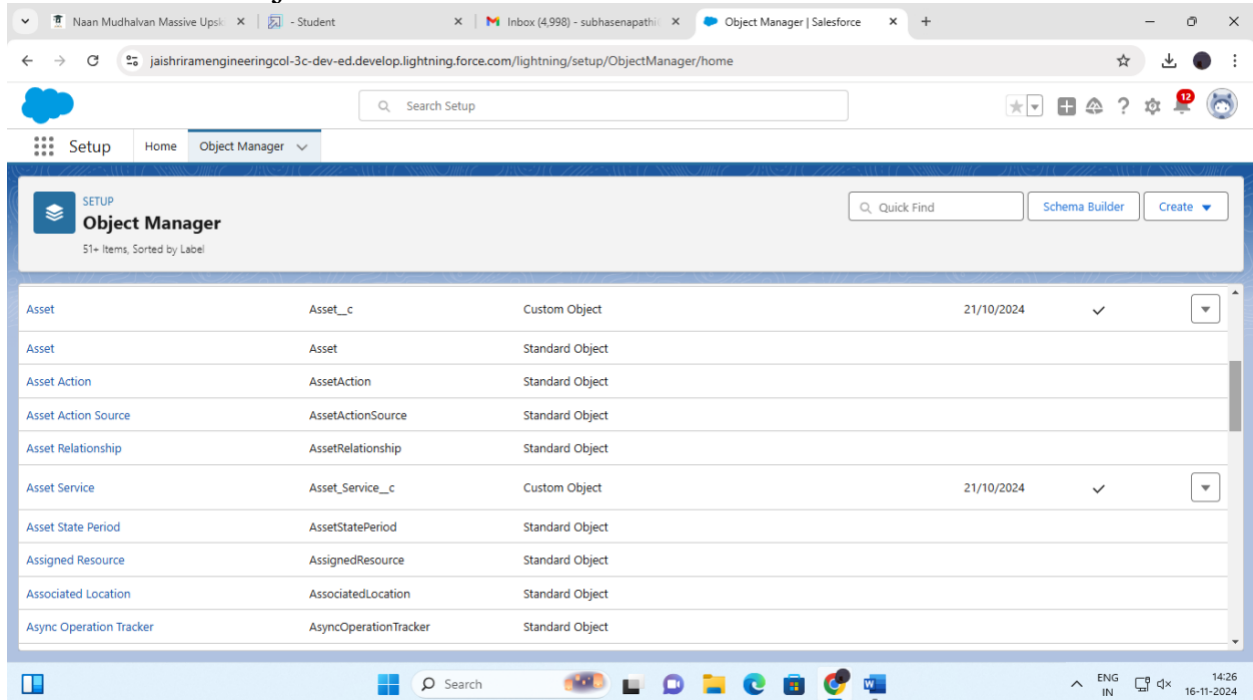
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1. Create Object

Create Employee Object ,Project Object, ProjectTask Object, Asset Object, AssetService Object.



2. Create Tabs

Creating a Custom Tab for Employee ,Project , Project Task, Asset, Asset Service objects.

Naan Mudhalvan Massive Upskilling Program - Student | Inbox (4,998) - subhasenapathii | Tabs | Salesforce

jaishriramengineeringcol-3c-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Setup Home Object Manager

Search Setup

tabs

User Interface

Rename Tabs and Labels

Custom Tabs

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

Action	Label	Tab Style	Description
Edit Del	Assets	Airplane	
Edit Del	Asset Services	Airplane	
Edit Del	Employees	Airplane	
Edit Del	Projects	Airplane	
Edit Del	ProjectTasks	Airplane	

Web Tabs

https://jaishriramengineeringcol-3c-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

14:29 16-11-2024

3. Create The Lightning App

Naan Mudhalvan Massive Upskilling Program - Student | d5I7P2ulqKVsb+A8p | n8xJOAAAAAIFTKSu | Inbox (4,998) - subha | App Manager | Salesforce

jaishriramengineeringcol-3c-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Setup Home Object Manager

Search Setup

app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

External Client Apps

External Client App Manager

OAuth Usage

Settings

Lightning Experience App Manager

New Lightning App New Connected App

24 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

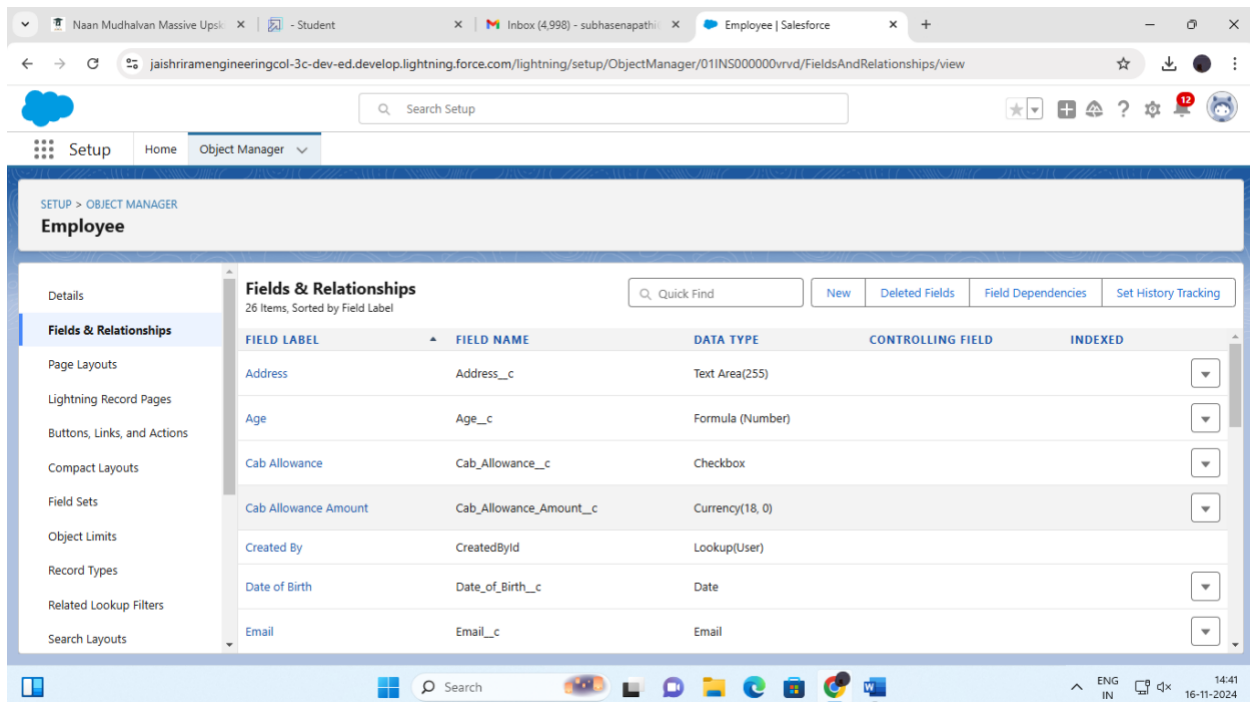
	App Name ↑	Developer Name	Description	Last Modified	Ap...	Vi...	
14	Queue Management	QueueManagement	Create and manage queues for your business.	21/10/2024, 8:06 am	Lightning	✓	
15	Sales	Sales	The world's most popular sales force automation (SFA) solution	21/10/2024, 8:06 am	Classic		
16	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities,...	21/10/2024, 8:06 am	Lightning	✓	
17	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple recor...	21/10/2024, 8:06 am	Lightning	✓	
18	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and fe...	21/10/2024, 8:06 am	Classic	✓	
19	Salesforce Scheduler...	LightningScheduler	Set up personalized appointment scheduling.	21/10/2024, 8:07 am	Lightning	✓	
20	Service	Service	Manage customer service with accounts, contacts, cases, and m...	21/10/2024, 8:06 am	Classic	✓	
21	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple r...	21/10/2024, 8:06 am	Lightning	✓	
22	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop...	21/10/2024, 8:06 am	Classic		
23	Subscription Manag...	RevenueCloudConsole	Get started automating your revenue processes	21/10/2024, 8:06 am	Lightning	✓	
24	Workforce Administr...	Workforce_Administrat...	The Workforce Administrator Solution is a comprehensive tool ...	21/10/2024, 11:12 ...	Lightning	✓	

14:33 16-11-2024

4.Create Fields and Relationship for Objects

i.Employee Object

Creating Text Field , Date of Birth Field, Formula Field, Picklist Field ,Self-Relationship Field ,Master-Detail Relationship between Employee & Asset Object, Qualification field, Address field, Experience field, Phone no field, Email field, Joining date field for employee object.



The screenshot displays the Salesforce Object Manager interface for the 'Employee' object. The 'Fields & Relationships' section is active, showing a list of 26 items sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The following table represents the data visible in the screenshot:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Age	Age__c	Formula (Number)		
Cab Allowance	Cab_Allowance__c	Checkbox		
Cab Allowance Amount	Cab_Allowance_Amount__c	Currency(18, 0)		
Created By	CreatedById	Lookup(User)		
Date of Birth	Date_of_Birth__c	Date		
Email	Email__c	Email		

ii.Create Fields for Project,Project task,Asset service,Asset Objects

The screenshot shows the Salesforce Object Manager interface for the 'Project' object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main area displays a table of 9 fields, sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Project ID	Name	Auto Number		✓
Project Lead	Project_Lead__c	Text(18)		
Project Name	Project_Name__c	Text(18)		
Project Status	Project_Status__c	Picklist		

5. Create OWD Setting

Set OWD as Private for Employee, Project and Asset Service objects.

The screenshot shows the Salesforce Sharing Settings page. The left sidebar lists 'Security' and 'Sharing Settings', with 'Sharing Settings' selected. The main area displays a table of sharing settings for various objects. The table includes columns for Object Name, Sharing Model, and Sharing Method. The 'Employee' object is highlighted, showing its sharing model as 'Private' and its sharing method as 'Private'.

Object Name	Sharing Model	Sharing Method
Asset	Public Read/Write	Private
Asset Service	Private	Private
Employee	Private	Private
Leave	Public Read/Write	Private
Project	Private	Private
ProjectTask	Controlled by Parent	Controlled by Parent

Other Settings:

- Manager Groups: ☐ (1)
- Secure guest user record access: ☒ (1)
- Require permission to view record names in lookup fields: ☐ (1)

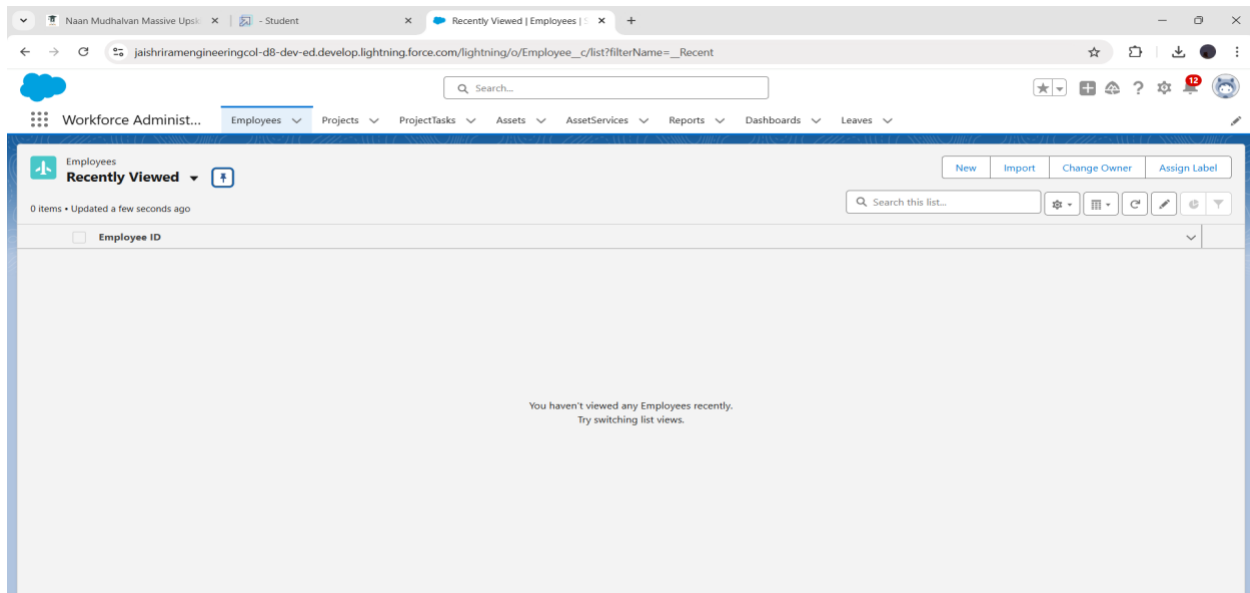
Sharing Rules:

Lead Sharing Rules: [Lead Sharing Rules Help](#)

No sharing rules specified.

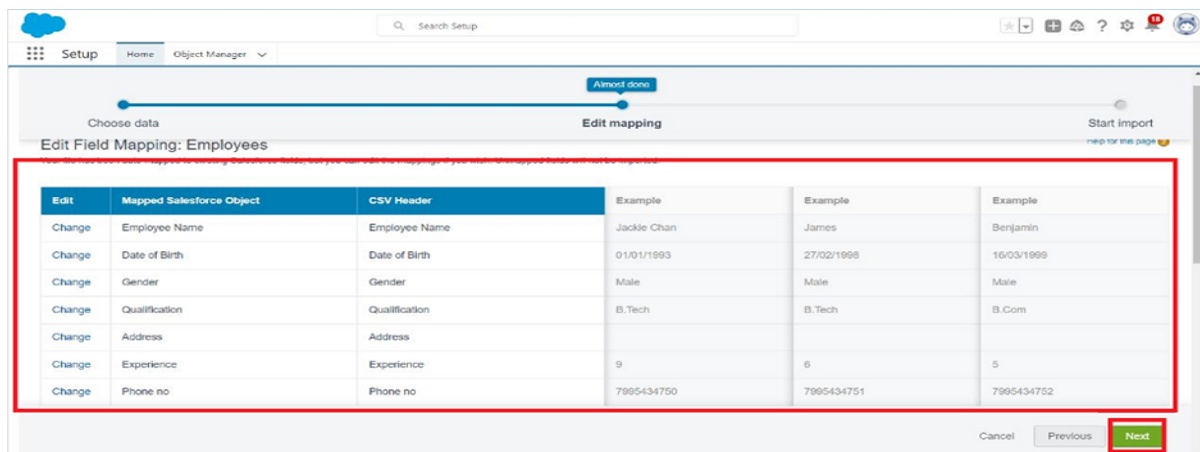
6. User Adoption

In this we need to Create a Record , View a Record, Delete a Record.



7. Importing data using Data Wizard

Select Data Import Wizard, and launch it. Click the Custom Objects tab and select the Employee object. Select Add new records. Click CSV and choose file Employee_CSV which we made earlier. Click Next, then the fields are automatically mapped.



Congratulations, your import has started!
Click OK to view your import status on the Bulk Data Load Job page.



Scroll down the page and verify that your data has been imported under batches. Make sure you have 0 records under the records failed column.

8.Create Profiles

Create HR Profile, Manager Profile and Employee Profile

Profiles


All Profiles

Edit

Delete

Create New View

New Profile



A

B

C

D

E

F

G

H

<input type="checkbox"/>	Action	Profile Name ↑	User License	Cus
<input type="checkbox"/>	Edit Clone	High Volume Customer Portal	High Volume Customer Portal	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	High Volume Customer Portal User	High Volume Customer Portal	<input type="checkbox"/>
<input type="checkbox"/>	Edit Del ...	HR	Salesforce	<input checked="" type="checkbox"/>

Profiles


All Profiles

Edit

Delete

Create New View

New Profile



A

B

C

D

E

F

G

H

I

<input type="checkbox"/>	Action	Profile Name	User License	Custom
<input type="checkbox"/>	<div><div>Edit</div><div>Delete</div></div> ...	Manager	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<div><div>Edit</div><div>Clone</div></div>	Marketing User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	<div><div>Edit</div><div>Clone</div></div>	Minimum Access - API Only Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/>	<div><div>Edit</div><div>Clone</div></div>	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>

9.Create Roles

Create HR role, Manager, On Site Employee, Remote Employee. On Site Employee and Remote Employee reports to Manager.

Creating the Role Hierarchy

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

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

- Jai Shriram Engineering College**
 - Add Role**
 - CEO** [Edit](#) [Del](#) [Assign](#)
 - Add Role**
 - CFO** [Edit](#) [Del](#) [Assign](#)
 - Add Role**
 - COO** [Edit](#) [Del](#) [Assign](#)
 - Add Role**
 - HR** [Edit](#) [Del](#) [Assign](#)
 - Add Role**
 - Manager** [Edit](#) [Del](#) [Assign](#)
 - Add Role**
 - On Site Employee** [Edit](#) [Del](#) [Assign](#)
 - Add Role**
 - Remote Employee** [Edit](#) [Del](#) [Assign](#)
 - Add Role**
 - SVP, Customer Service & Support** [Edit](#) [Del](#) [Assign](#)
 - Add Role**
 - Customer Support, International** [Edit](#) [Del](#) [Assign](#)
 - Add Role**

10. Create Users

All Users

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

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

View: [All Users](#) [Create New User](#)

Action	Full Name ↑	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty_00dd00000e3nb7uaf.tawt8eqko6au@chatter.salesforce.com		✓	Chatter Free User
Edit	chawala_kalpana	kchaw	subha@ginlis.subhagini	Remote Employee	✓	Remote Employee
Edit	kishan_sundeeep	skish	subha@ginlis.subhagini	On Site Employee	✓	On Site Employee
Edit	Mikaelson_Kol	kmika	subhaa@gini.subhagini	Manager	✓	Manager
Edit	Mikaelson_Niklaus	nmika	subha@gini.subhagini	HR	✓	HR
Edit	Subhagini S. Lakshmi	LSubh	subhas@jaishriram.sandbox		✓	System Administrator
Edit	User_Integration	integ	integration@00dd00000e3nb7uaf.com		✓	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00dd00000e3nb7uaf.com		✓	Analytics Cloud Security User

11. Creating Page Layout

Creating a page layout for Employee object. 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.

SETUP > OBJECT MANAGER

Employee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Page Layouts

3 Items, Sorted by Page Layout Name

Q Quick Find

New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Employee Layout	Lakshmi Subhagini S, 20/10/2024, 10:13 pm	Lakshmi Subhagini S, 21/10/2024, 10:51 pm	▼
On Site Employee Layout	Lakshmi Subhagini S, 21/10/2024, 12:00 pm	Lakshmi Subhagini S, 21/10/2024, 10:51 pm	▼
Remote Employee Layout	Lakshmi Subhagini S, 21/10/2024, 12:17 pm	Lakshmi Subhagini S, 21/10/2024, 10:51 pm	▼

12.Create a Chatter group

Creating a chatter group for your organization.

Workforce Administ...

Employees

Projects

ProjectTasks

Assets

AssetServices

Reports

Dashboards

Leaves

Groups

Recently Viewed | Groups

Groups

Recently Viewed

1 item • Updated a few seconds ago

Q Search this list...

⚙

🗑

🔄

Name	Last Activity	Members	Owner	
Internal Discussion (Private)	21/10/2024, 12:32 pm	5 Members	Lakshmi Subhagini S	▼

13.Create Record Types

Creating “On Site Employee” Record Type and "Remote Employee" Record Type

SETUP > OBJECT MANAGER

Employee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Record Types

2 Items, Sorted by Record Type Label

Q Quick Find

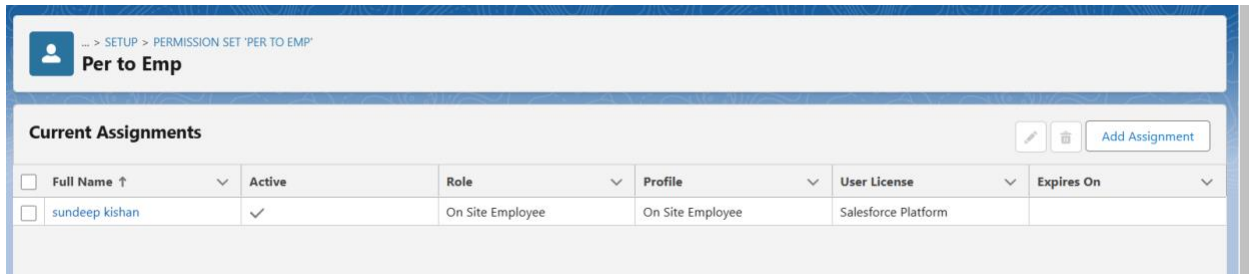
New

Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY	
On Site Employee		✓	Lakshmi Subhagini S, 21/10/2024, 1:51 pm	▼
Remote Employee		✓	Lakshmi Subhagini S, 21/10/2024, 1:59 pm	▼

14. Creating a permission set

Enter the label name as “Per to Emp”, under Apps Select object settings. Click on Employee object, click on Edit and under object permission check for read and create. After saving the permission click on the Manage assignment, Click on Add Assignment.



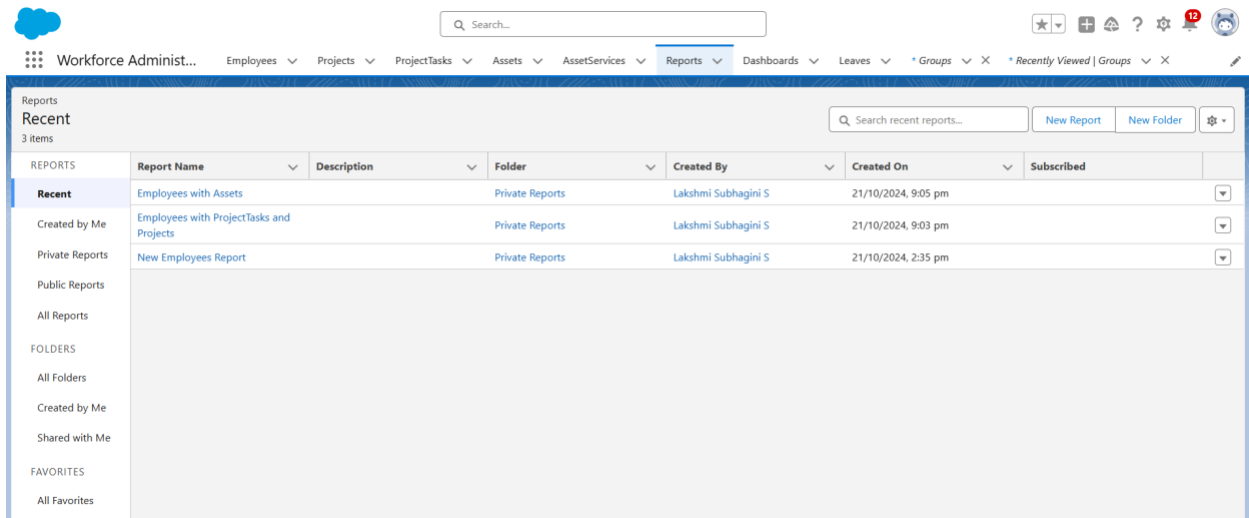
... > SETUP > PERMISSION SET "PER TO EMP"

Per to Emp

Current Assignments [Add Assignment](#)

<input type="checkbox"/> Full Name ↑	Active	Role	Profile	User License	Expires On
<input type="checkbox"/> sundeep kishan	✓	On Site Employee	On Site Employee	Salesforce Platform	

15. Create Reports



Workforce Administrators

Search...

Reports

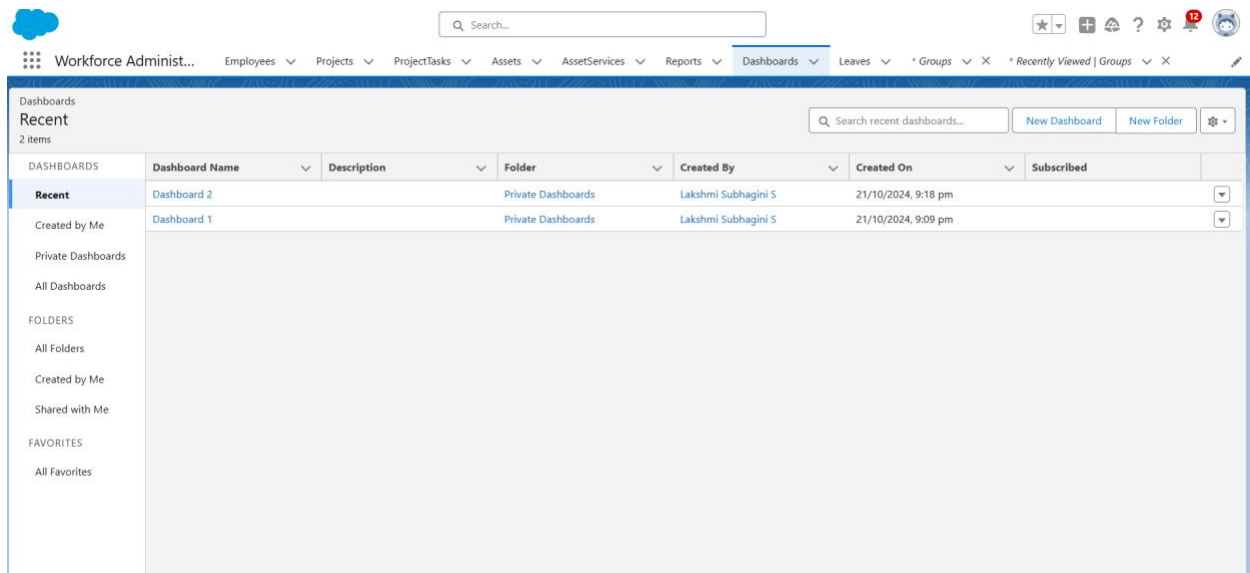
Recent
3 items

Search recent reports...

New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Employees with Assets		Private Reports	Lakshmi Subhagini S	21/10/2024, 9:05 pm	
Created by Me	Employees with ProjectTasks and Projects		Private Reports	Lakshmi Subhagini S	21/10/2024, 9:03 pm	
Private Reports	New Employees Report		Private Reports	Lakshmi Subhagini S	21/10/2024, 2:35 pm	
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

16.Create Dashboard



17. Approval Process

Use Case:

The Hiring Manager (HR) at TheSmartBridge wants to track the leave applications for each and every employee of the company. His requirement is the no leave application with more than 5 days of leave should come to him but automatically get submitted to the Employee Manager. If the leave application is more than 5 days then only his approval is needed.

The top screenshot shows the 'Approval Processes' page for 'Leaves'. It includes a 'Manage Approval Processes For: Leaves' dropdown and a 'Create New Approval Process' button. Below, it lists 'Active Approval Processes' (none available) and 'Inactive Approval Processes' (one listed: 'Leave Approval Request').

The bottom screenshot shows the detailed configuration for the 'Leave Approval Request' process. It includes sections for 'Initial Submission Actions', 'Approval Steps', 'Final Approval Actions', and 'Final Rejection Actions'.

Initial Submission Actions

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

Approval Steps

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

Final Approval Actions

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

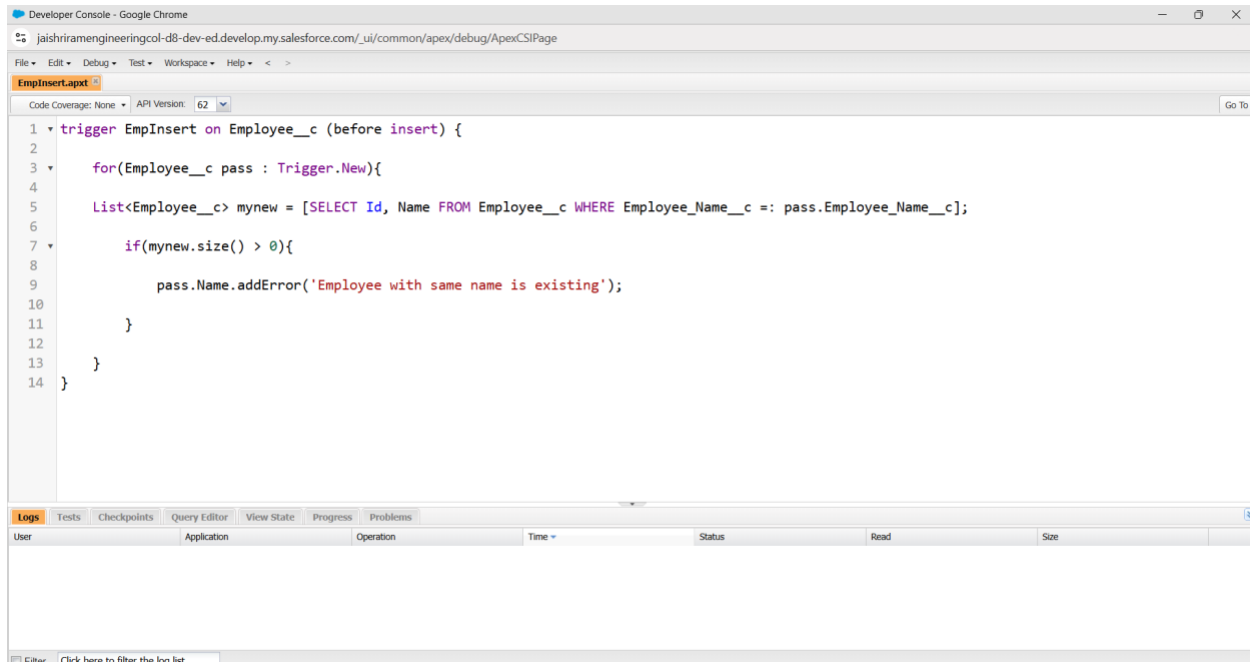
Final Rejection Actions

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

18. Apex Trigger

Create an Apex Trigger

Give the Apex Trigger name as “EmpInsert”, and select “Employee__c” from the dropdown for sObject.



Code Snippet:

```

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');
        }
    }
}

```

Follow the steps which are mentioned in Milestone 7, Activity 1 and try to create a record with the existing Employee Name say “Jackie Chan” you’ll face the error while saving the record saying “Employee with same name is existing”.