Workforce Administration Solution (Dev)

Salesforce

- Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.
- Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

Activity 1: Creating Developer Account

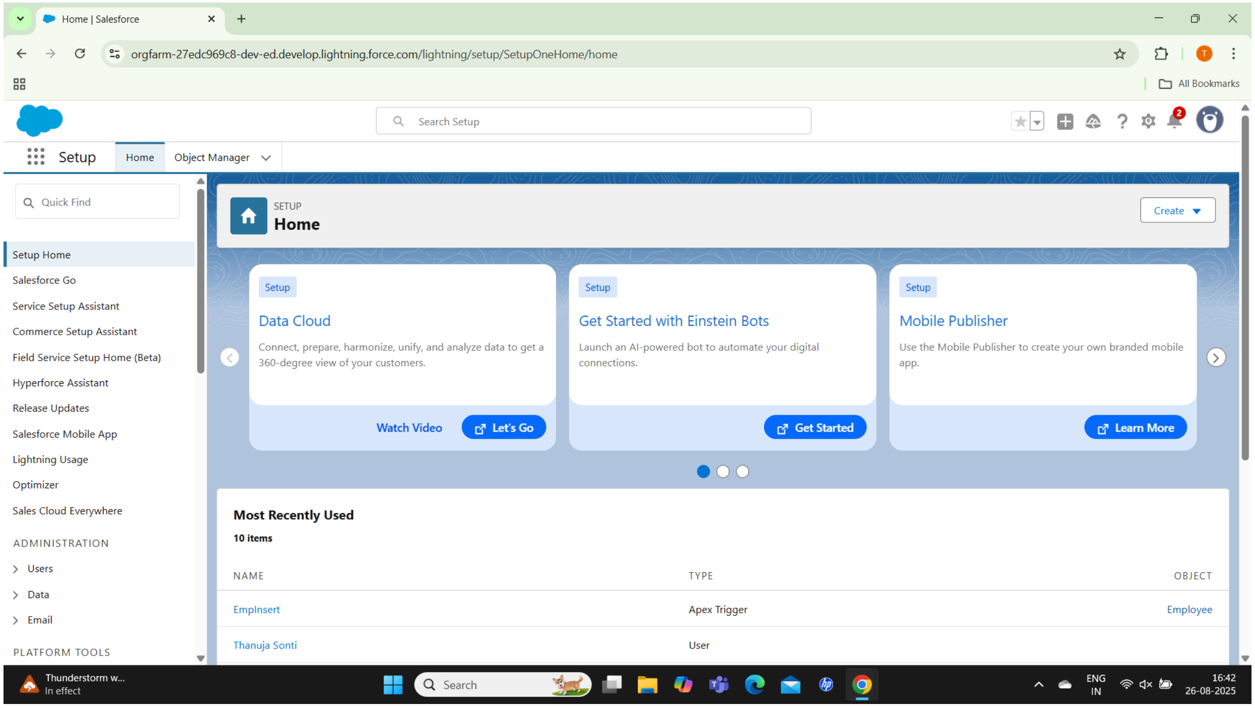
Creating a developer org in salesforce.

1. Go to https://developer.salesforce.com/signup
2. On the sign up form, enter the following details :

    1) First name & Last name
    2) Email
    3) Role : Developer
    4) Company : College Name
    5) County : India
    6) Postal Code : pin code
    7) Username : should be a combination of your name and company
    8) Click on Sign me up.

Activity 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.
2. Click on Verify Account
3. Give a password and answer a security question and click on change password.
4. Then you will redirect to your salesforce setup page.



Object

- Salesforce objects are database tables that permit you to store data that is specific to an organization.
- Salesforce objects are of two types:

1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users.

Activity 1: Create Employee Object

- To create an object:

1. From the setup page --> Click on Object Manager --> Click on Create --> Click on Custom Object.
    1) Enter the label name: Employee
    2) Plural label name: Employees
    3) Enter Record Name Label and Format
        1 Record Name : Employee ID

2 Data Type : Auto Number

3 Display Format : EMS-{0000}

4 Starting Number : 1

2. Click on Allow reports,
3. Allow search --> Save.

Activity 2: Create Project Object

Activity 3: Create 3 more objects with label names as ProjectTask, Asset, Asset Service.

Tabs

- A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Activity 1: Creating a Custom Tab (Employee)

1. Go to setup page --> type Tabs in Quick Find bar --> click on tabs --> New (under custom object tab)
2. Select Object(Employee) --> Select any tab style --> Next (Add to profiles page) keep it as default --> Next (Add to Custom App) keep it as default --> Save.

Activity 2: Creating a Custom Tab (Project)

Activity 3: Creating tabs for remaining objects

The Lightning App:

- Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

- Lightning apps let you brand your apps with a custom color 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 between apps.

Activity 1: Create a Lightning App

- To create a lightning app page:

1. Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.

2. Fill the app name in app details and branding as follow

App Name : Workforce Administrator Solution
Developer Name : this will auto populated
Description : Give a meaningful description
Image : optional (if you want to give any image you can otherwise not mandatory)
Primary color hex value : keep this default

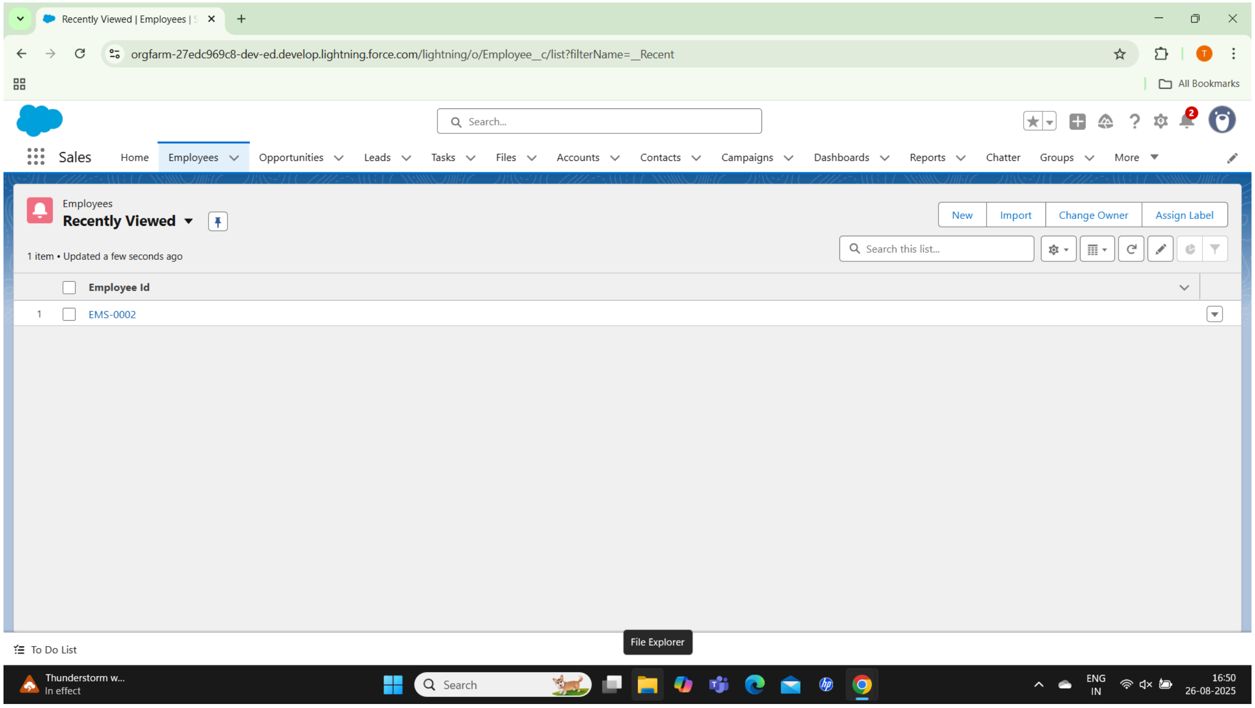
3. Then click Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.

4. To Add Navigation Items:

Search the items in the search bar(Employees, Projects, ProjectTask, Assets, Asset Services, Reports, Dashboard) from the search bar and move it using the arrow button --> Next.

5. To Add User Profiles:

Search profiles (System administrator) in the search bar --> click on the arrow button --> save & finish.



Fields & Relationships

- 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.

Activity 1 : Creating Text Field in Employee Object

Activity 2 : Creating Date of Birth Field in Employee Object

Activity 3 : Creating Formula Field in Employee Object

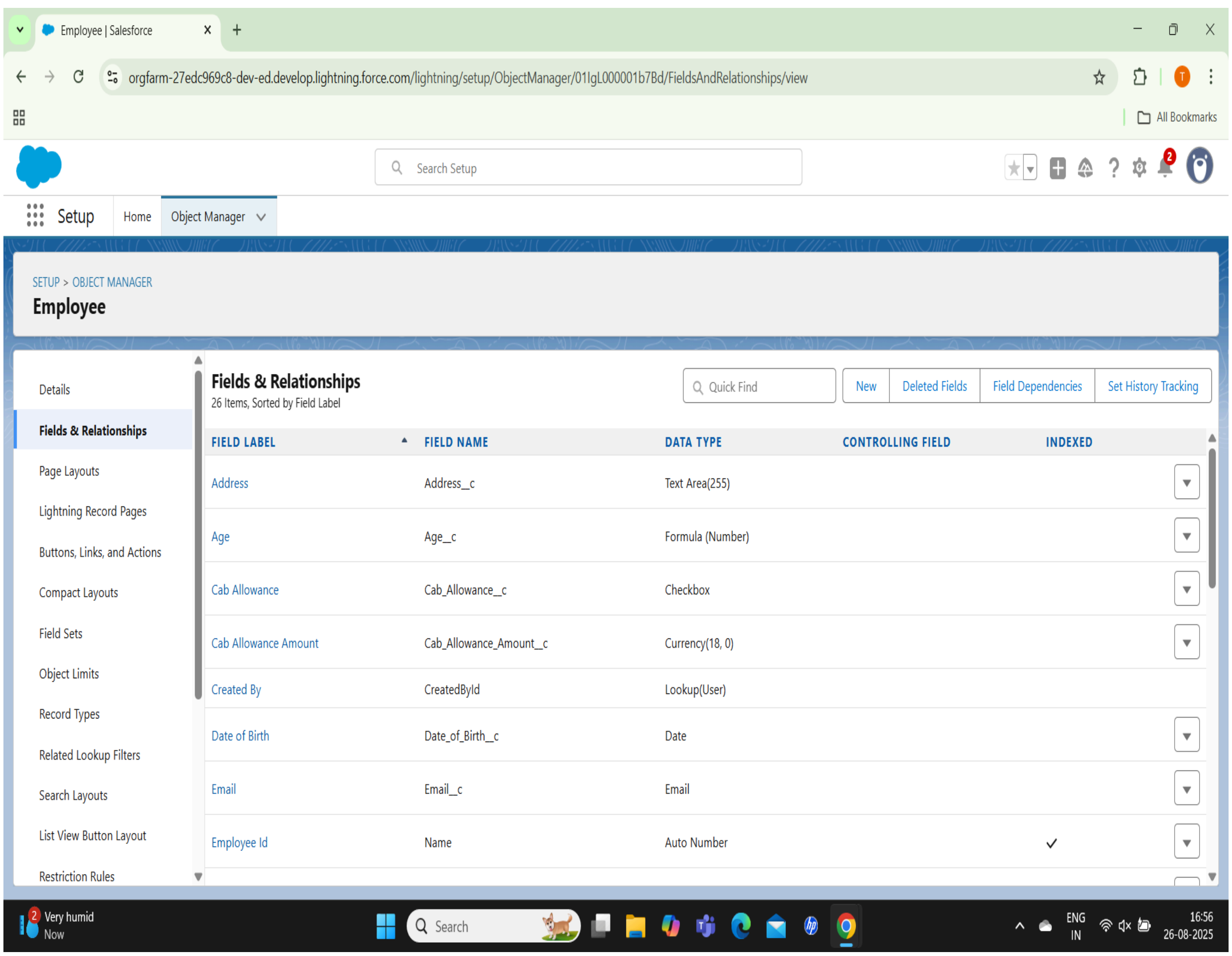
Activity 4 : Creating Picklist Field in Employee Object

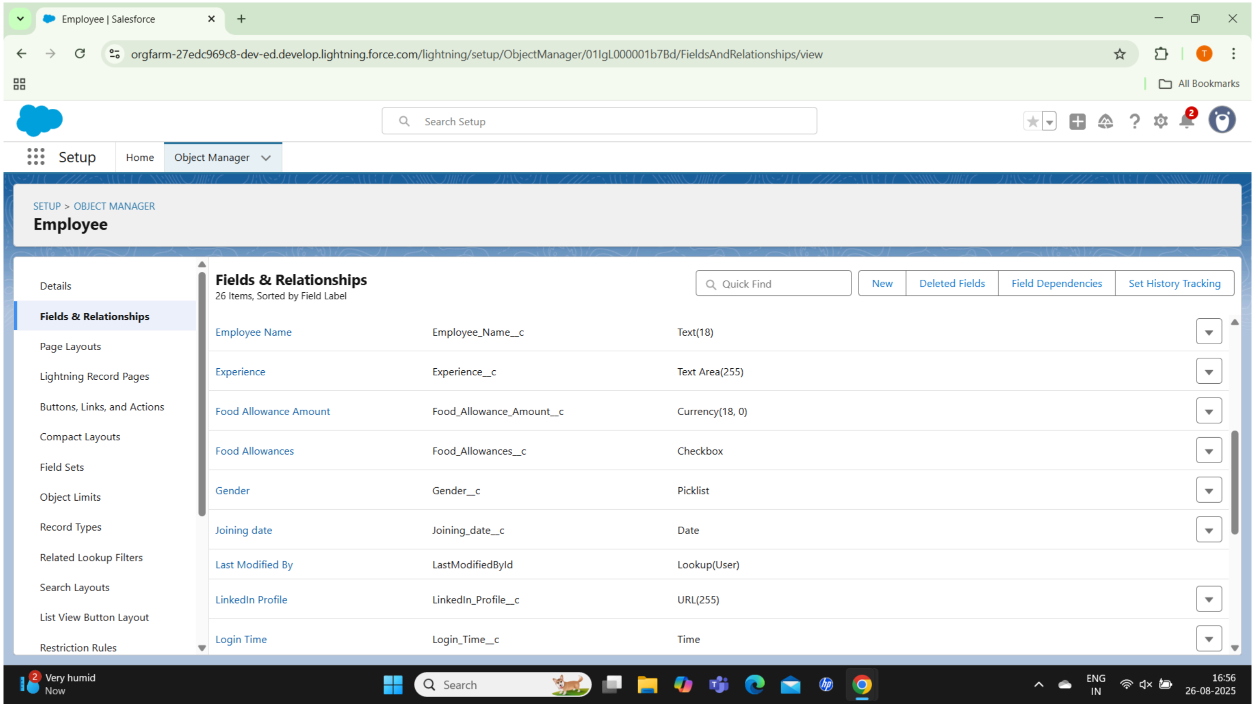
Activity 5 : Creating Self-Relationship Field

Activity 6 :Creating Master-Detail Relationship Between Employee &Asset Object

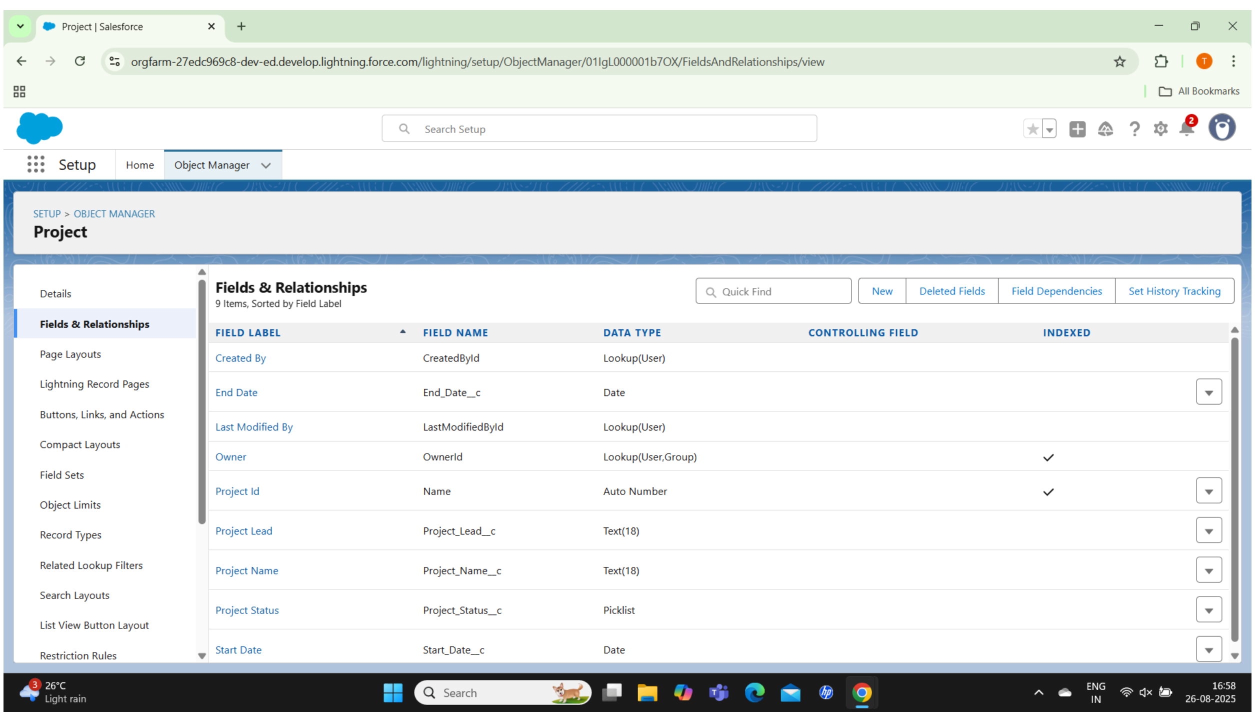
Activity 7 : Creating Remaining Fields in Employee Object, Project Object, Project Task Object, Asset Object, Asset Service Object

- **Fields In Employee Object:**

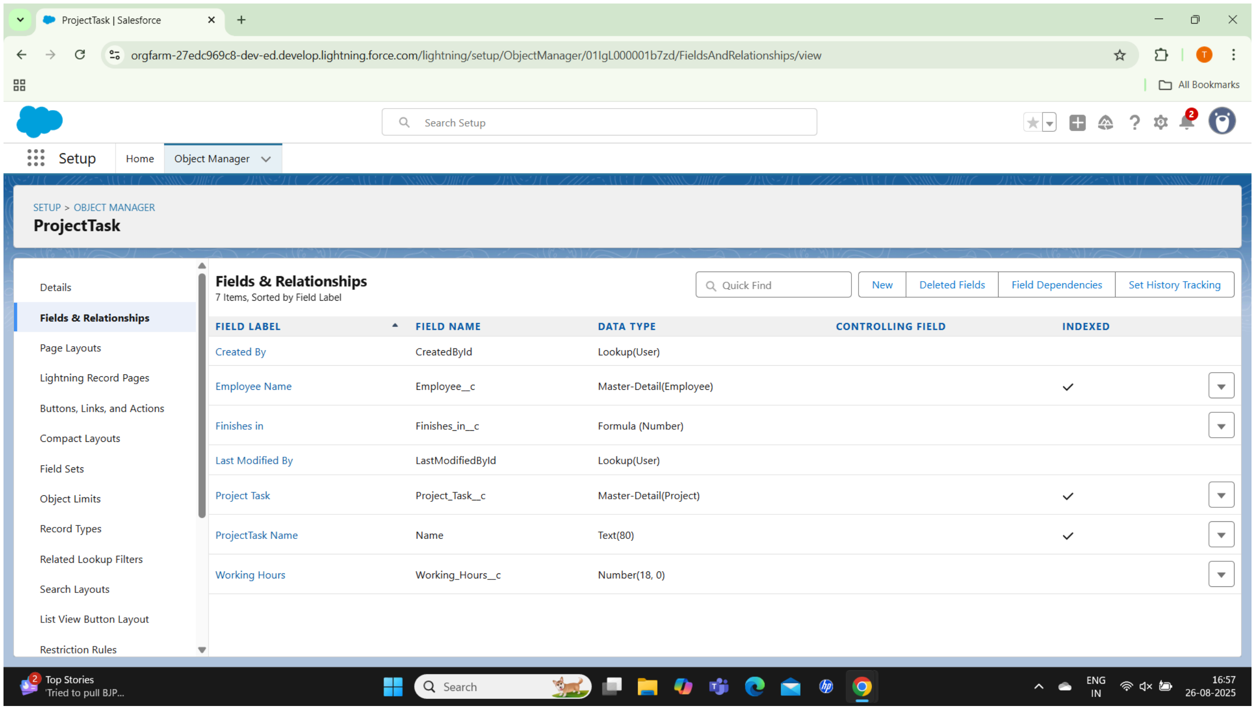




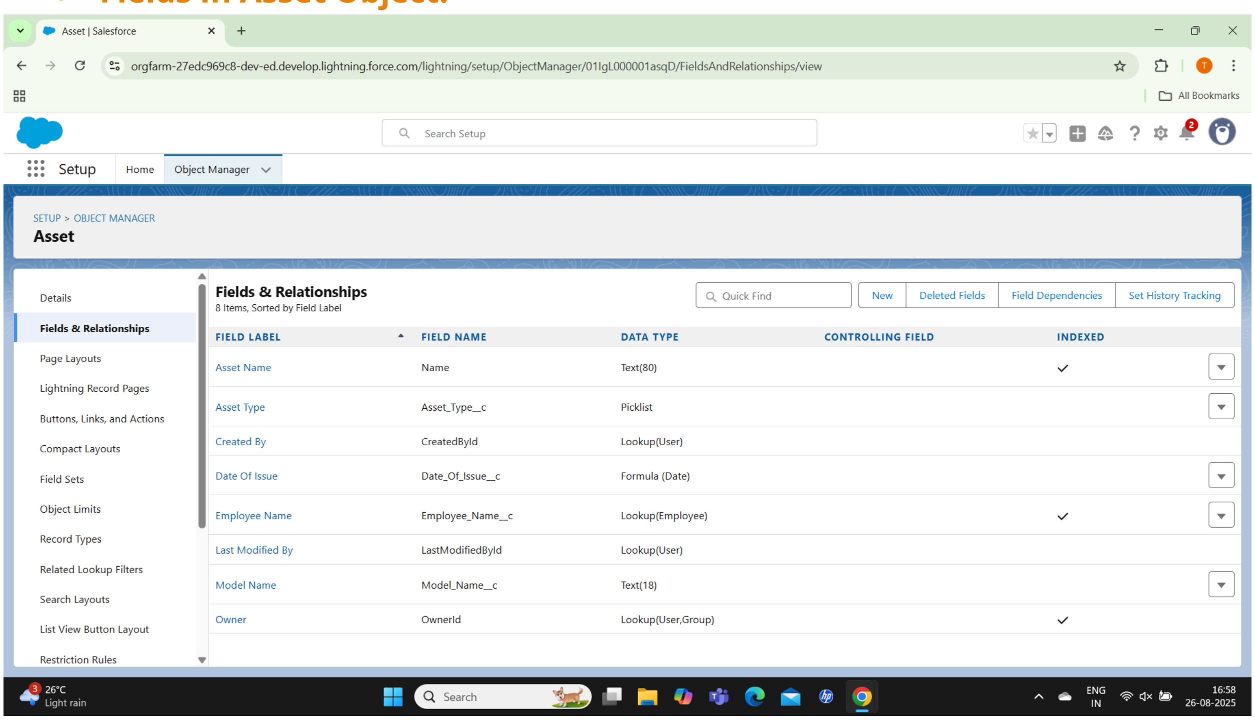
- **Fields In Project Object:**



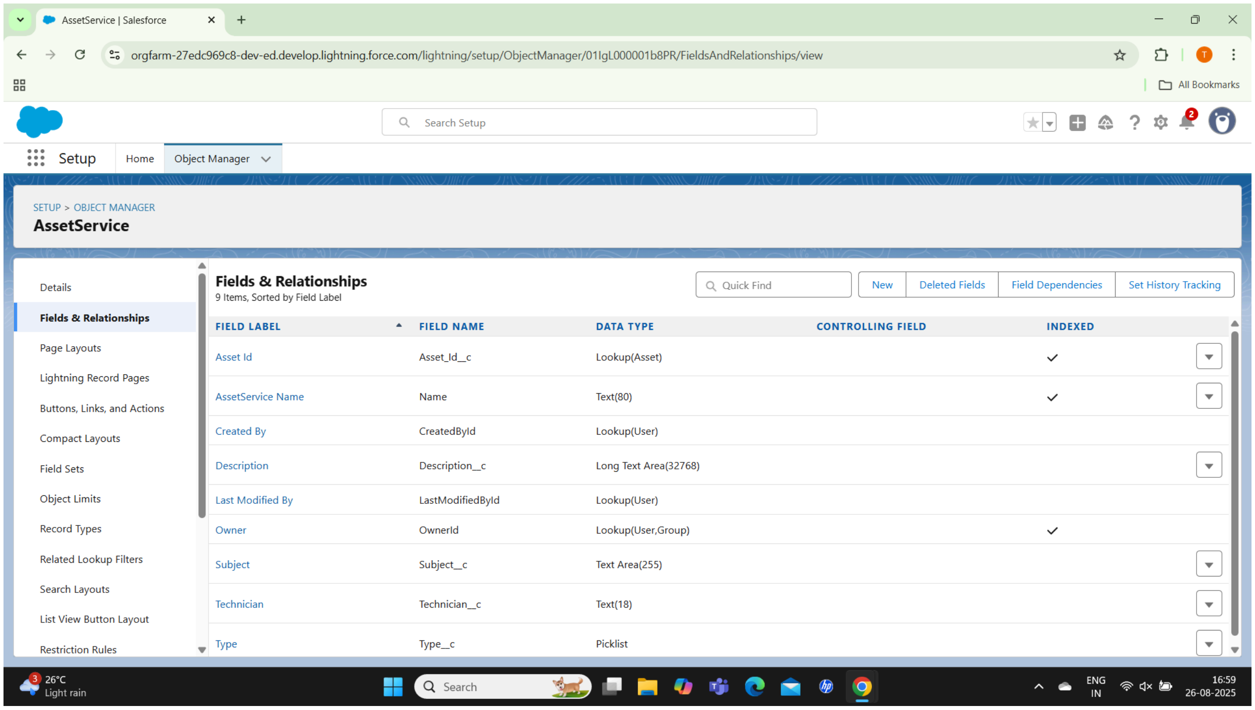
- ## Fields In Project Task Object:



- ## Fields In Asset Object:

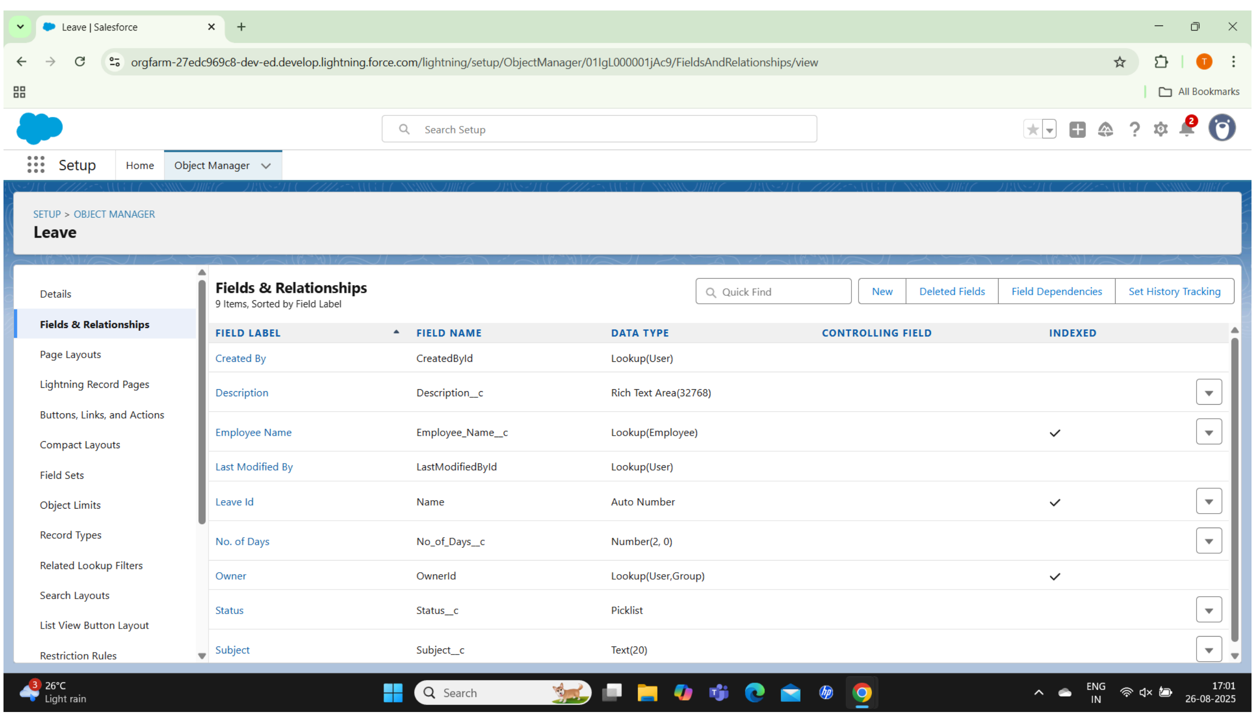


- ## Fields In Asset Service Object:



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Asset Id	Asset_Id__c	Lookup(Asset)		✓
AssetService Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Description	Description__c	Long Text Area(32768)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Subject	Subject__c	Text Area(255)		
Technician	Technician__c	Text(18)		
Type	Type__c	Picklist		

- ## Fields In Leave Object:

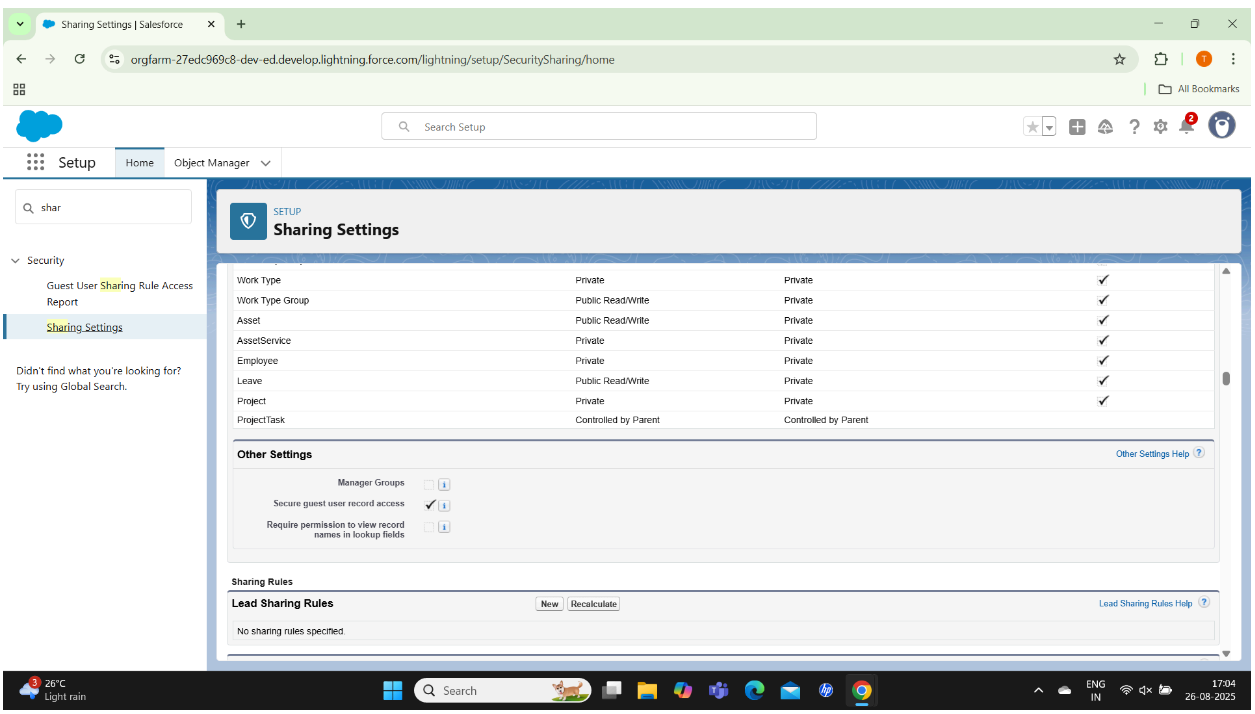


FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Description	Description__c	Rich Text Area(32768)		
Employee Name	Employee_Name__c	Lookup(Employee)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Leave Id	Name	Auto Number		✓
No. of Days	No_of_Days__c	Number(2, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Status	Status__c	Picklist		
Subject	Subject__c	Text(20)		

Setting OWD

Activity 1: Create OWD Setting

1. Go to Set Up --> in the Quick Find box type "Sharing Settings" --> click on it.
2. Click Edit in the Organization-Wide Defaults area.
3. Search for the Employee object.
4. Under default internal access and default external access change the options to “Private” and under grant access using hierarchies select the check box.
5. Click on save.
6. This Setting is for all the Users Which have been Created.



User Adoption

Activity 1: Create a Record (Employee)

1. Click on App Launcher on the left side of the screen.
2. Search Employee Management System & click on it.
3. Click on the Employee tab.

4. Click New.
5. Fill the Details and click on Save.

Activity 2: View a Record (Employee)

1. Click on App Launcher on the left side of the screen.
2. Search Employee Management System & click on it.
3. Click on the Employee Tab.
4. Click on any record name. you can see the details of the Employee

Activity 3: Delete a Record (Employee)

1. Click on App Launcher on the left side of the screen.
2. Search Employee Management System & click on it.
3. Click on the Employee Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete.

Import Data

Activity-1: Importing data using Data Wizard

1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.
3. Click Launch Wizard!
4. Click the Custom Objects tab and select the Employee object.
5. Select Add new records.
6. Click CSV and choose file Employee_CSV which we made earlier. Click Next.
7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.
8. The next screen gives you a summary of your data import. Click Start Import.
9. Click OK on the popup.
10. Scroll down the page and verify that your data has been imported under batches.
11. Make sure you have 0 records under the records failed column.

Profiles

Activity 1: HR Profile

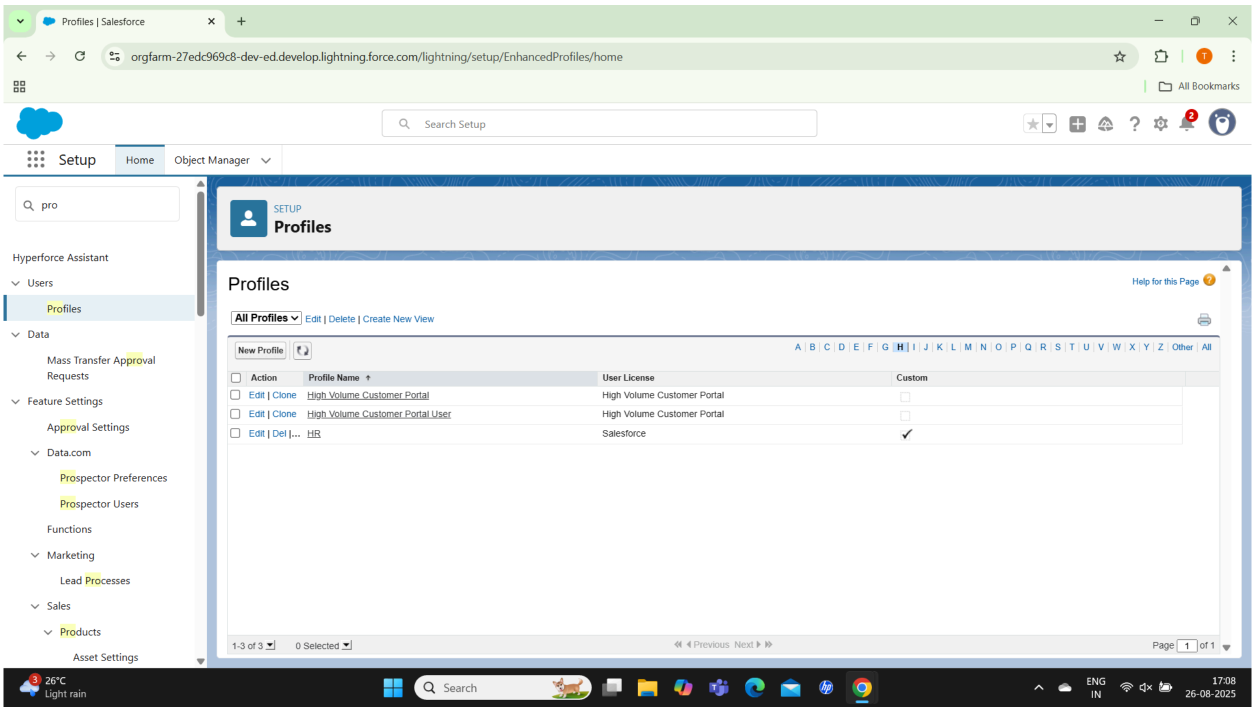
- To create a new profile:

1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (Standard user) --> enter profile name (HR) --> Save.

2. While still on the profile page, then click Edit.

3. Scroll down to Custom Object Permissions and Give access permissions for Assets and Asset Services objects.

4. Scroll down and Click on Save.



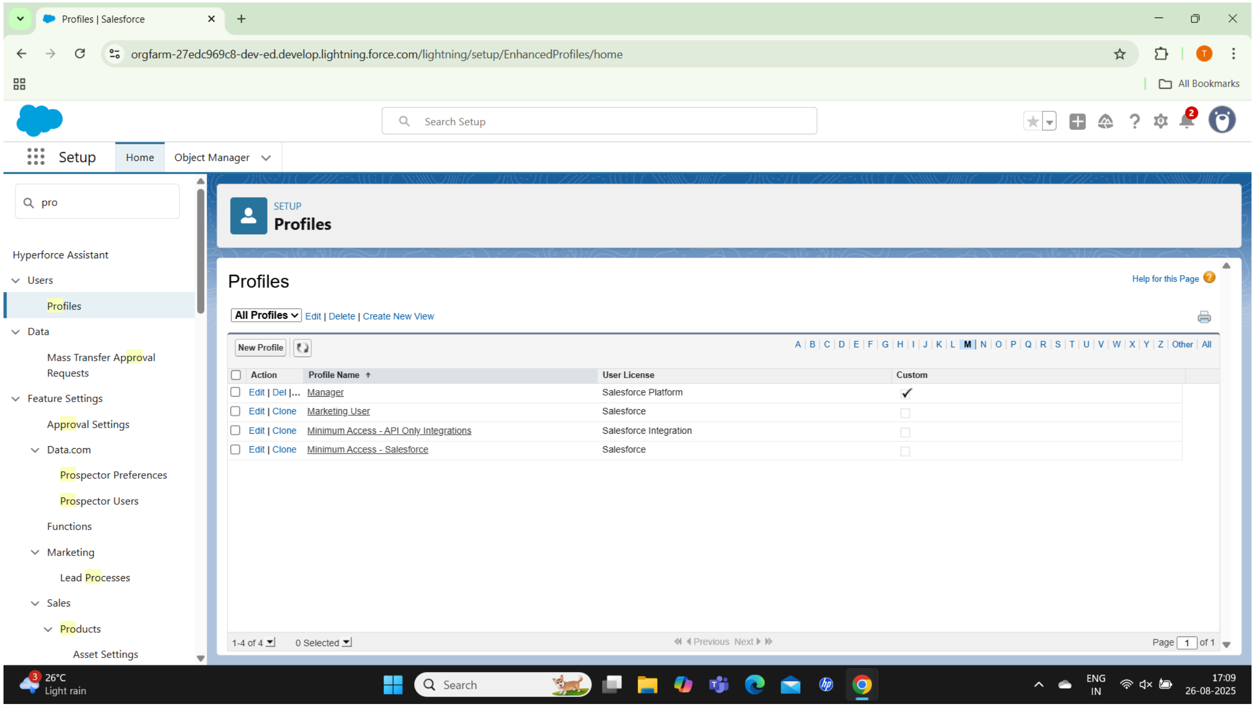
Activity 2: Manager Profile

1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (Salesforce Platform User) --> enter profile name (Manager) --> Save.

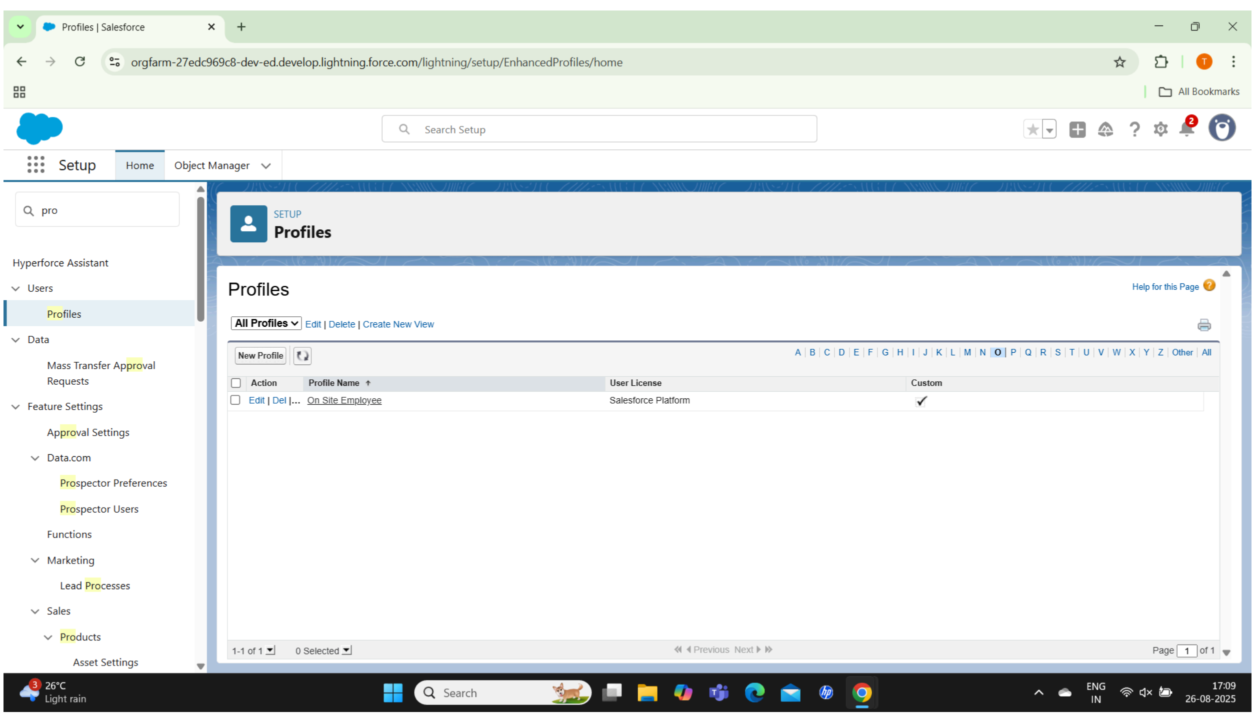
2. While still on the profile page, then click Edit.

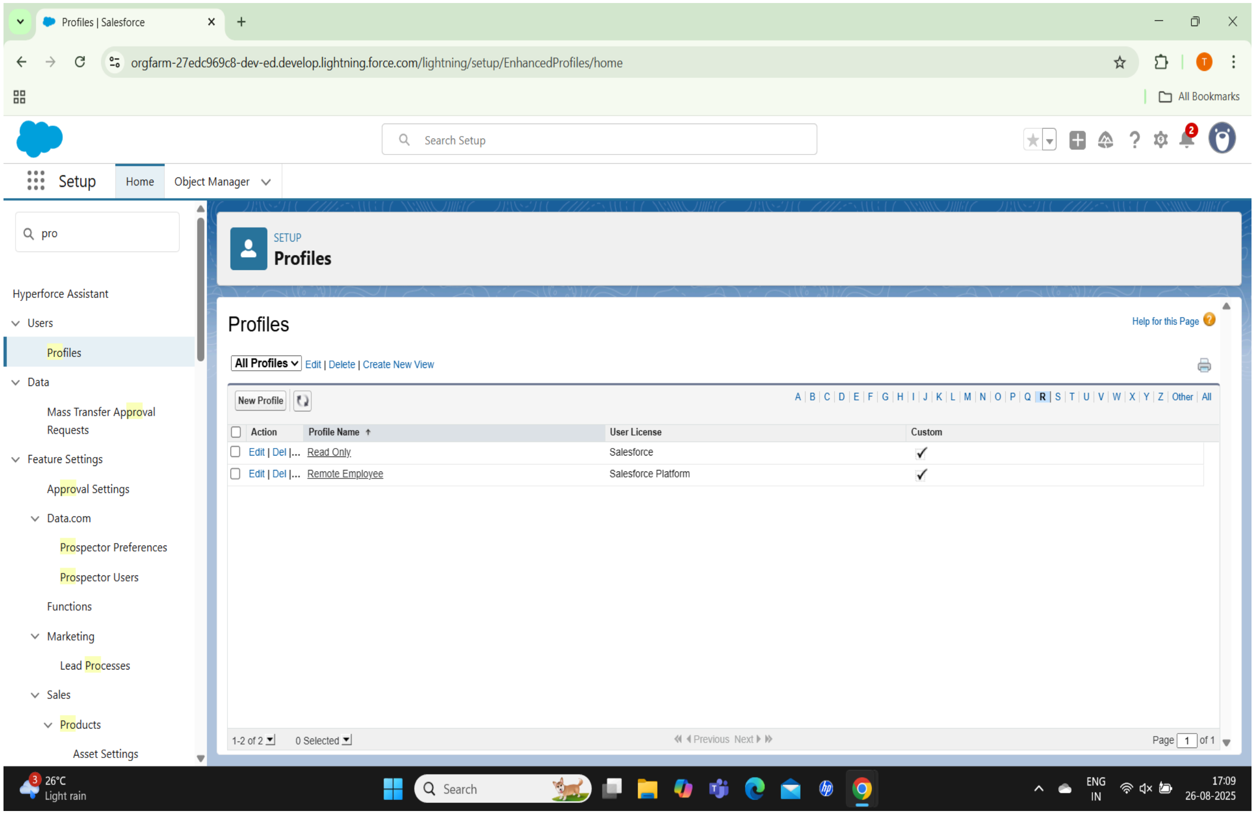
3. Scroll down to Custom Object Permissions and Give access permissions for Employee, Project and Project Task objects.

4. Scroll down and Click on Save.



Activity 3: Create Employee Profile





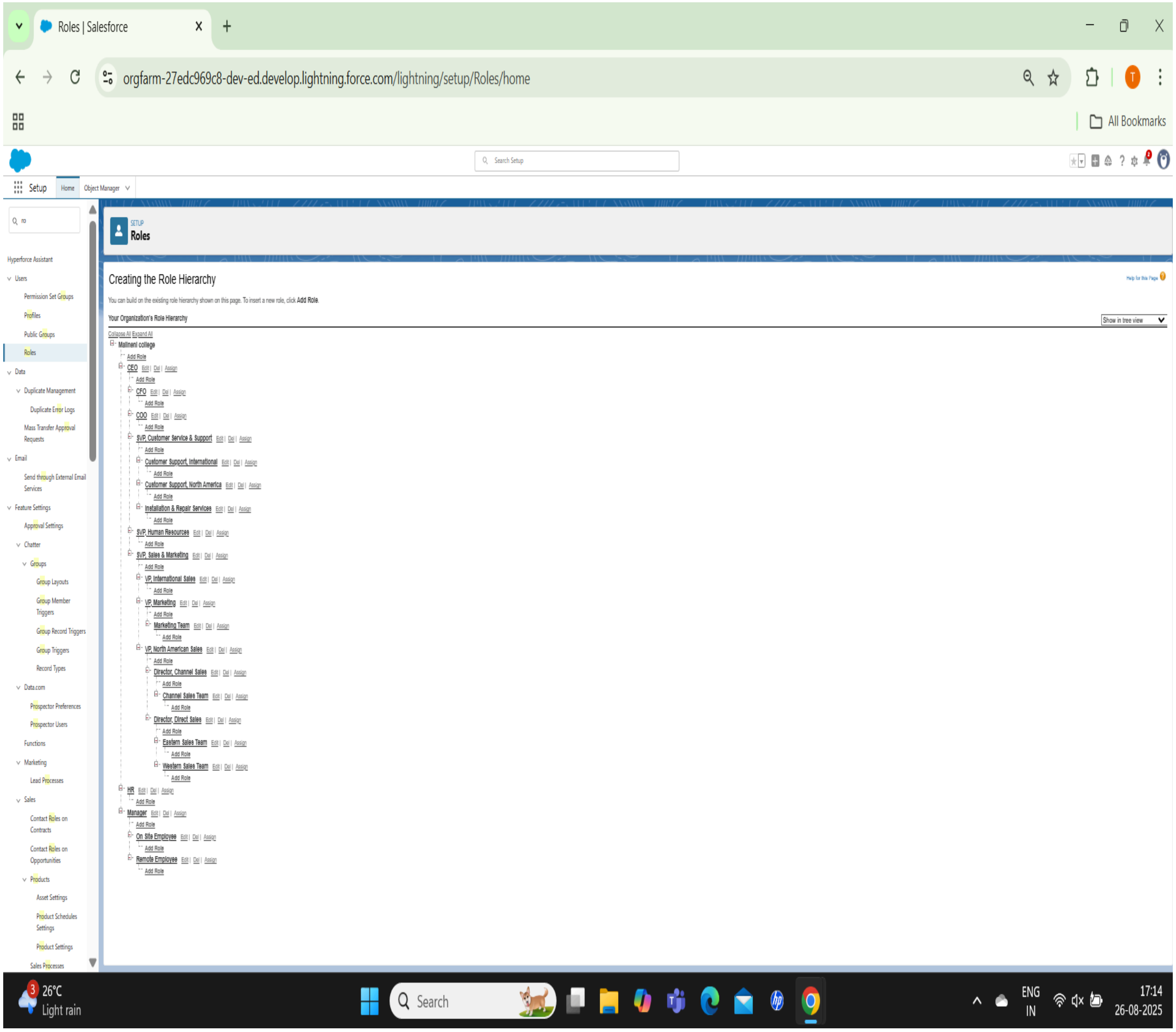
Role

Activity 1: Creating HR Role

1. Go to quick find --> Search for Roles --> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as “HR” and Role name gets auto populated. Check to whom this role (HR) reports. Then click on Save.
4. Refer the below diagram to understand which role reports to which role.

Activity 2: Creating more roles

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



Users

Activity 1: Create User

1. Go to setup --> type users in quick find box --> select users --> click New user.
2. Fill in the fields
   1. First Name : Niklaus
   2. Last Name : Mikaelson

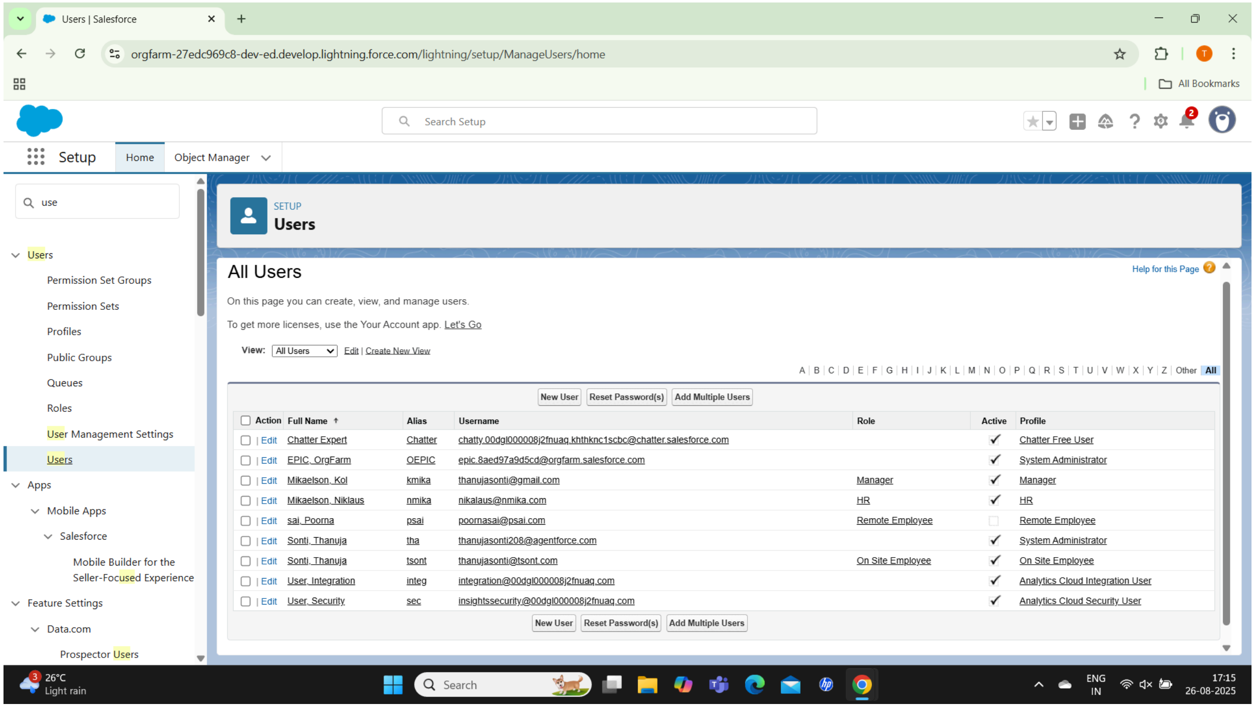
    3. Alias : Give a Alias Name
    4. Email id : Give your Personal Email id
    5. Username : Username should be in this form: text@text.text
    6. Nick Name : Give a Nickname
    7. Role : HR
    8. User license: Salesforce
    9. Profiles : HR
3. Save.

Activity 2: Creating another user

1. Go to setup --> type users in quick find box --> select users --> click New user.
2. Fill in the fields
    1 First Name : Kol
    2 Last Name : Mikaelson
    3 Alias : Give a Alias Name
    4 Email id : Give your Personal Email id
    5 Username : Username should be in this form: text@text.text
    6 Nick Name : Give a Nickname
    7 Role : Manager
    8 User license : Salesforce Platform
    9 Profiles : Manager
3. Save.

Activity 3: Creating more users

- Create two more users as we created in activity 2.



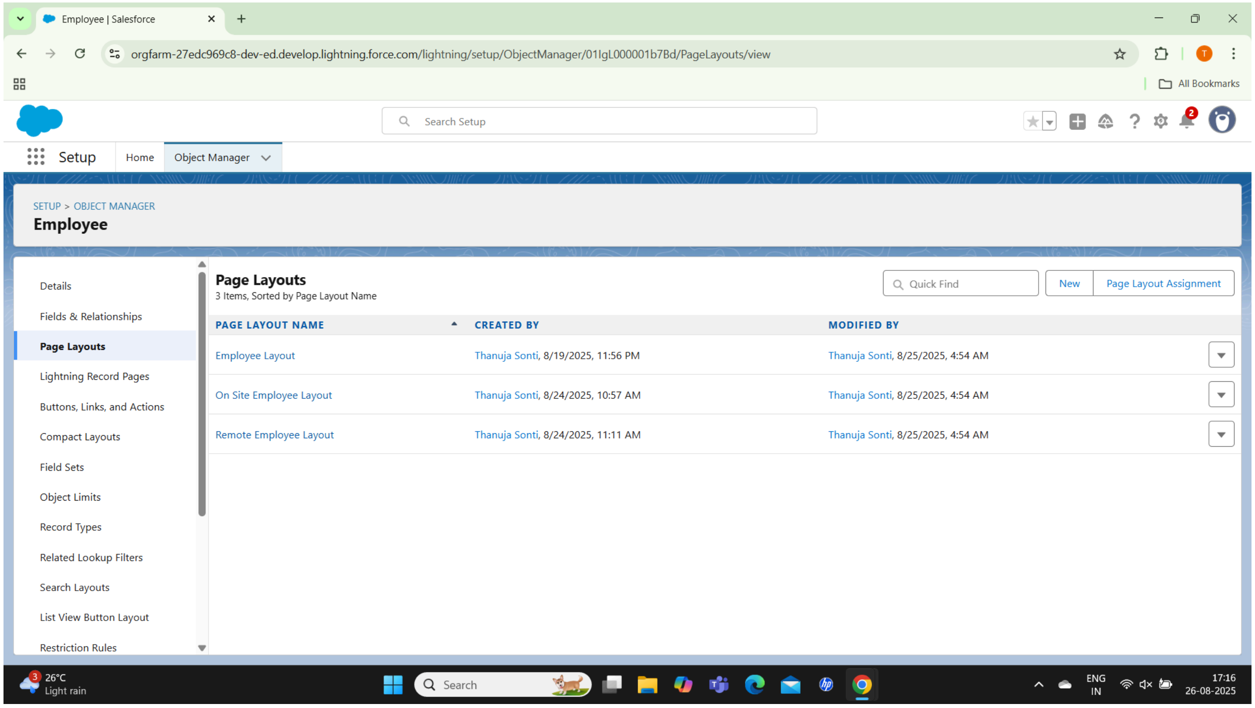
Page layouts

Activity 1 : creating a page layout for Employee Object

1. Go to Setup --> Click on Object Manager --> Search for the object (Employee) --> From drop down click on Edit.
2. Click on Page layout --> Click on New.
3. Give Page layout Name as "On Site Employee Layout" and click on Save.
4. Drag and drop the Section from the highlight panel below the Information and name it as "Personal Information" and click Ok.
5. Drag Date of Birth, Address and Age fields from Employee Information to Personal Information section.
6. Similarly perform the above step to create "Allowances" and add allowances fields in it as shown below.
7. Click Save.
8. Make sure your page layout looks like the picture above.

Activity 2 : 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.

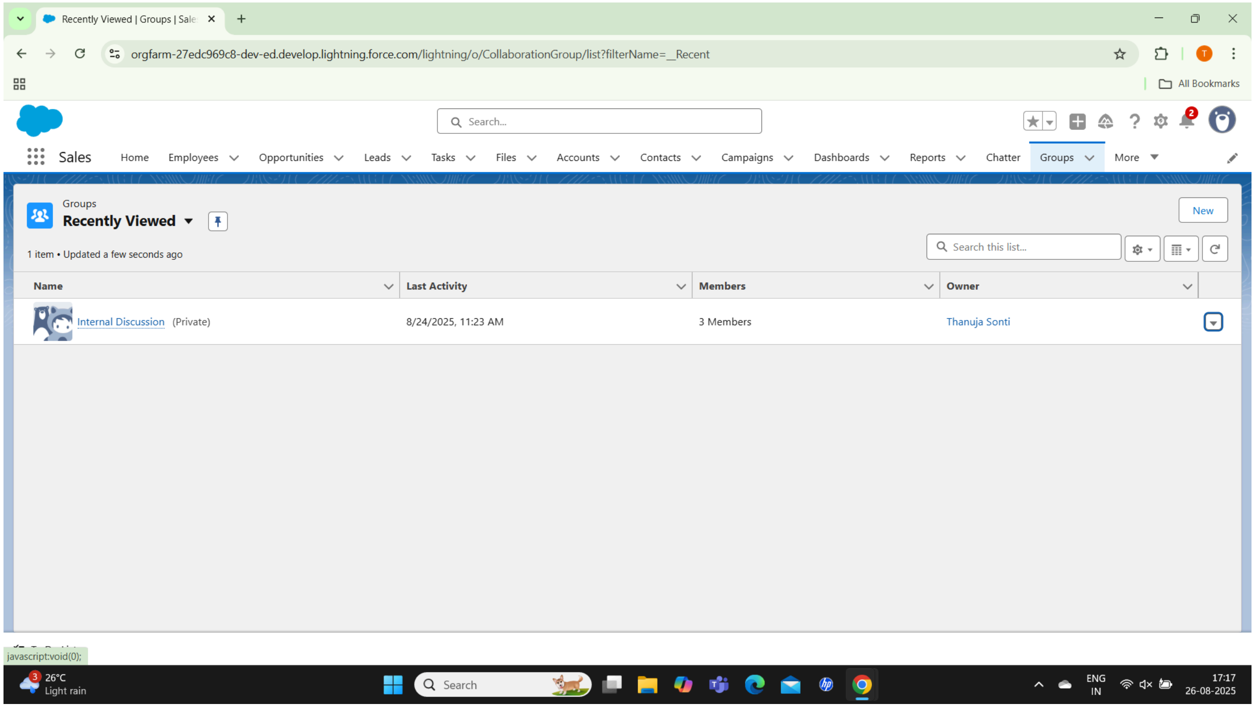


Chatter Group

Activity 1 : Creating a chatter group for your Organization

To Create a chatter group:

1. Click the App Launcher.
2. Enter Groups in the Search apps and items... box and select Groups.
3. Click New.
4. Fill in the new group information with these details:
5. Click Save & Next. Skip the Upload Picture section and click Next.
6. On the Manage Members screen, click Add next to users you created in the previous activity.
7. Click Done.
8. This is how your group interface looks like.
9. Where it says Share an update, post this message to the group: Welcome to the Internal Discussion Group, here you can post anything which is related to ongoing projects.
10. Click Share.

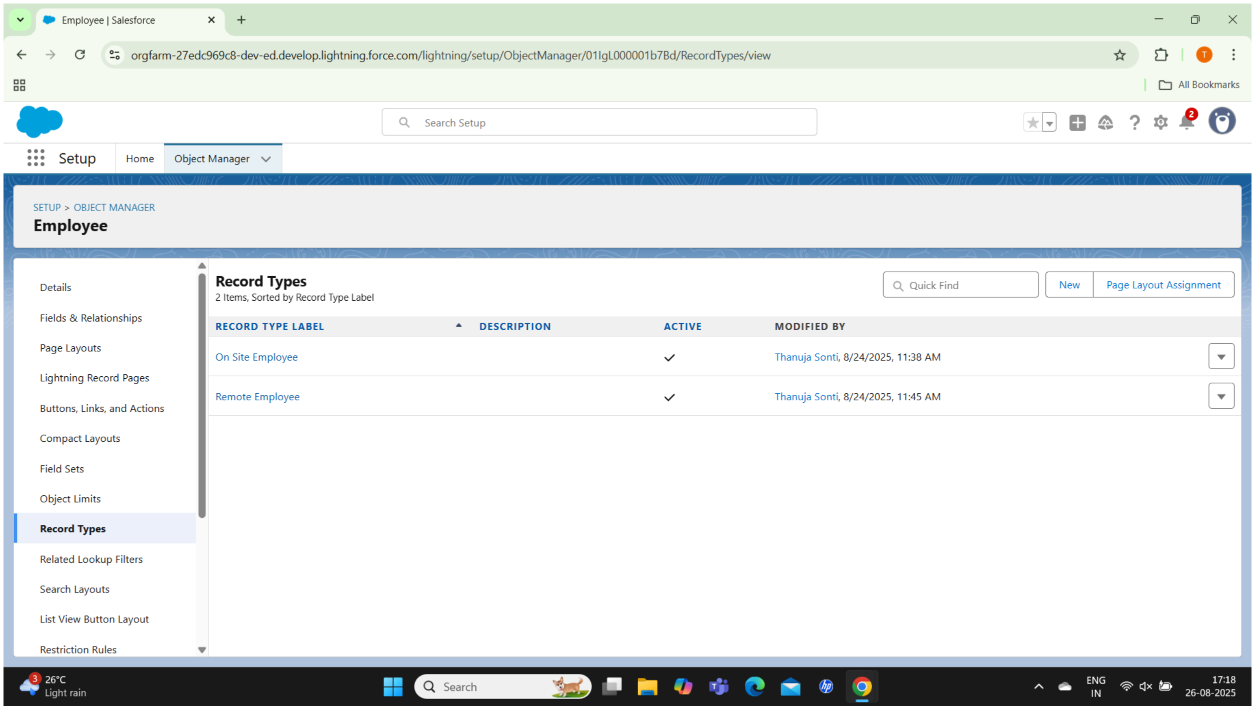


Record Types

Activity 1: Creating On Site Employee Record Type

1. Go to Setup --> click on Object Manager --> Search for the object (Employee) --> from drop down click Edit.
2. From the left panel click Record Types --> New.
3. Give Record Type Label as “On Site Employee” and make it active.
4. Uncheck for “Make Available”.
5. Scroll down and check for the Manager & System Administrator profile and click on Next.
6. Select “Apply a different layout for each profile”, and change page layout to On Site Employee Layout for manager profile and System Administrator.
7. click Save.

Activity 2: Creating "Remote Employee" Record Type



Permission sets

Activity 1: Creating a permission set

1. Go to setup --> type “permission sets” in quick search --> select permission sets --> New.

2. Enter the label name as “Per to Emp” --> Save.

3. Under Apps Select object settings.

4. Click on Employee object --> click on Edit --> under object permission check for read and create.

5. Click on Save.

6. After saving the permission click on the Manage assignment

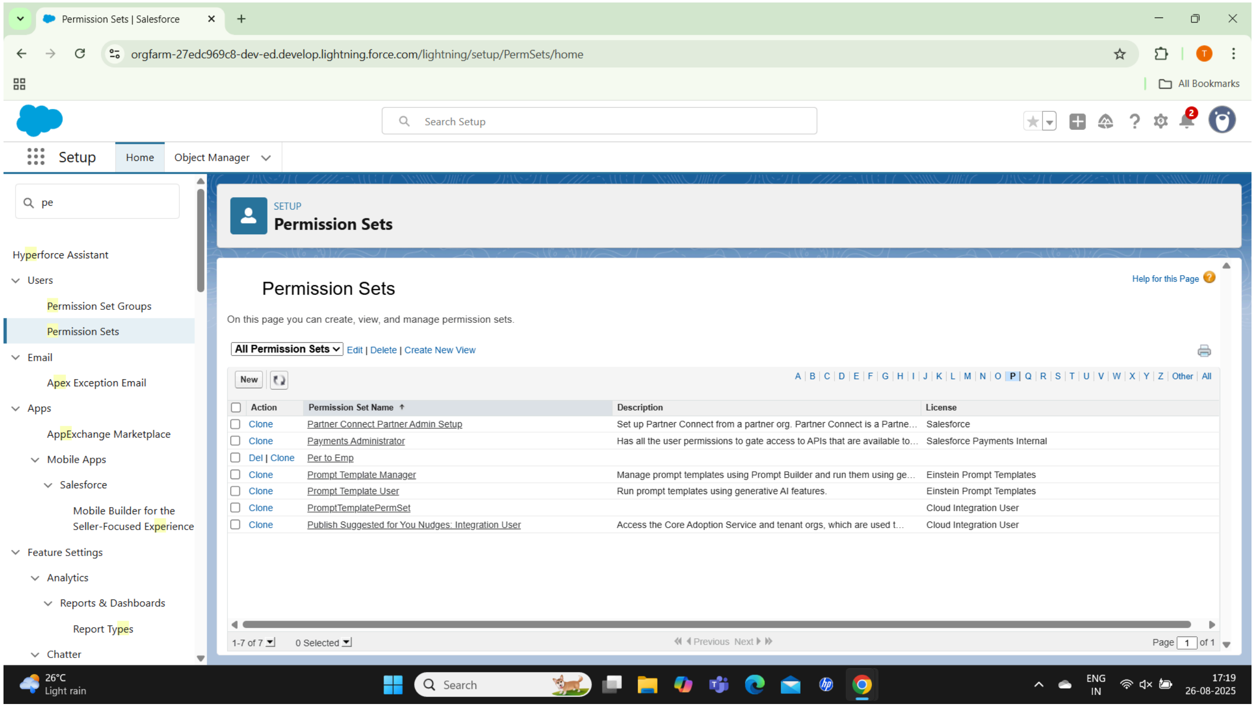
7. Now click on the Manage Assignment.

8. Click on Add Assignment.

9. Now select the users(any one user with the profile “On Site Employee”) and click on Next.

10. Click on Assign

11. Click on Done.



Reports

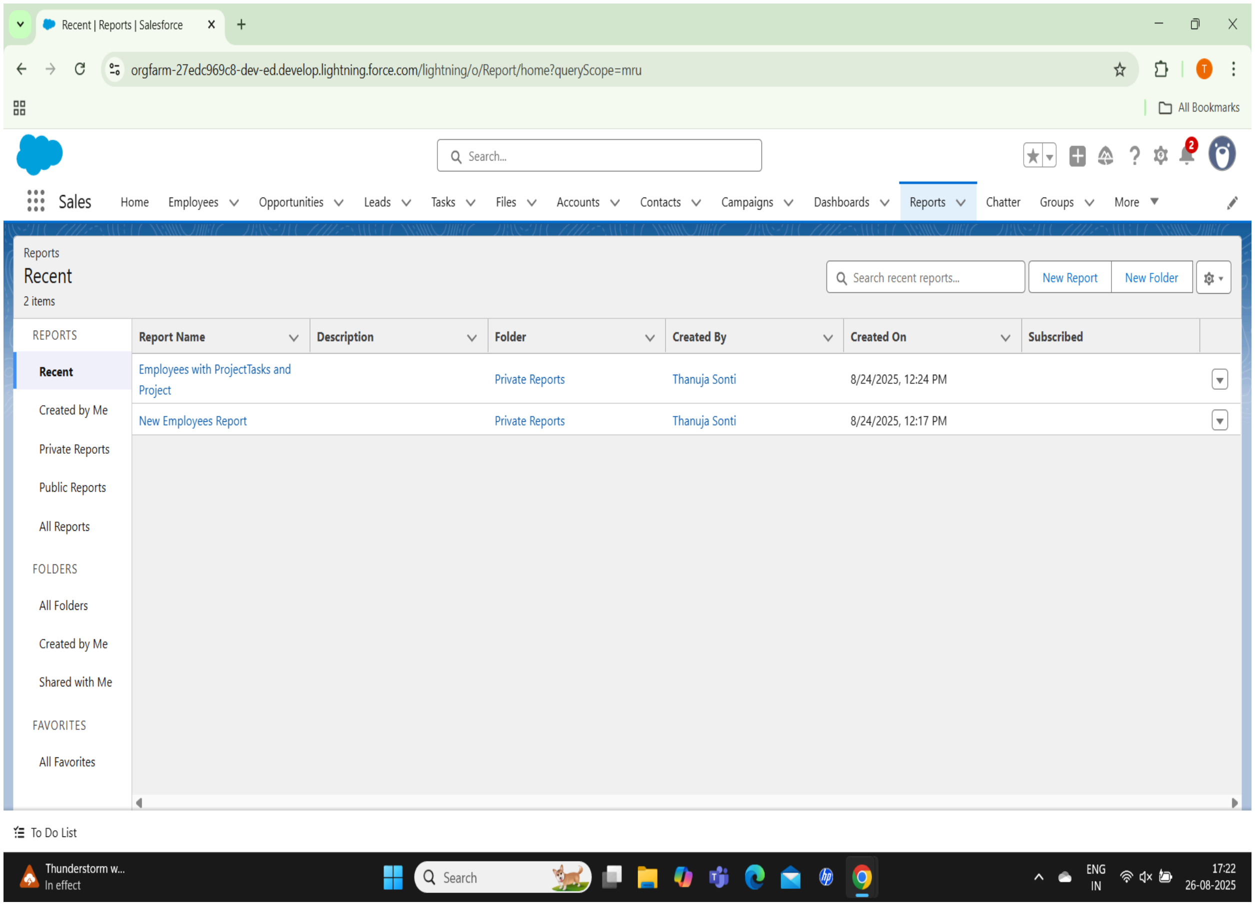
Activity 1: Create Report

1. Go to the app --> click on the reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel --> click on start report.
4. Customize your report
   --> Add fields from left pane as shown below
5. Save or run it.

Activity 2: Create 2 more Reports

1. Create a report with report type: “Employees with ProjectTasks and Projects”.

2. Create a report with report type: “Employees with Assets”.



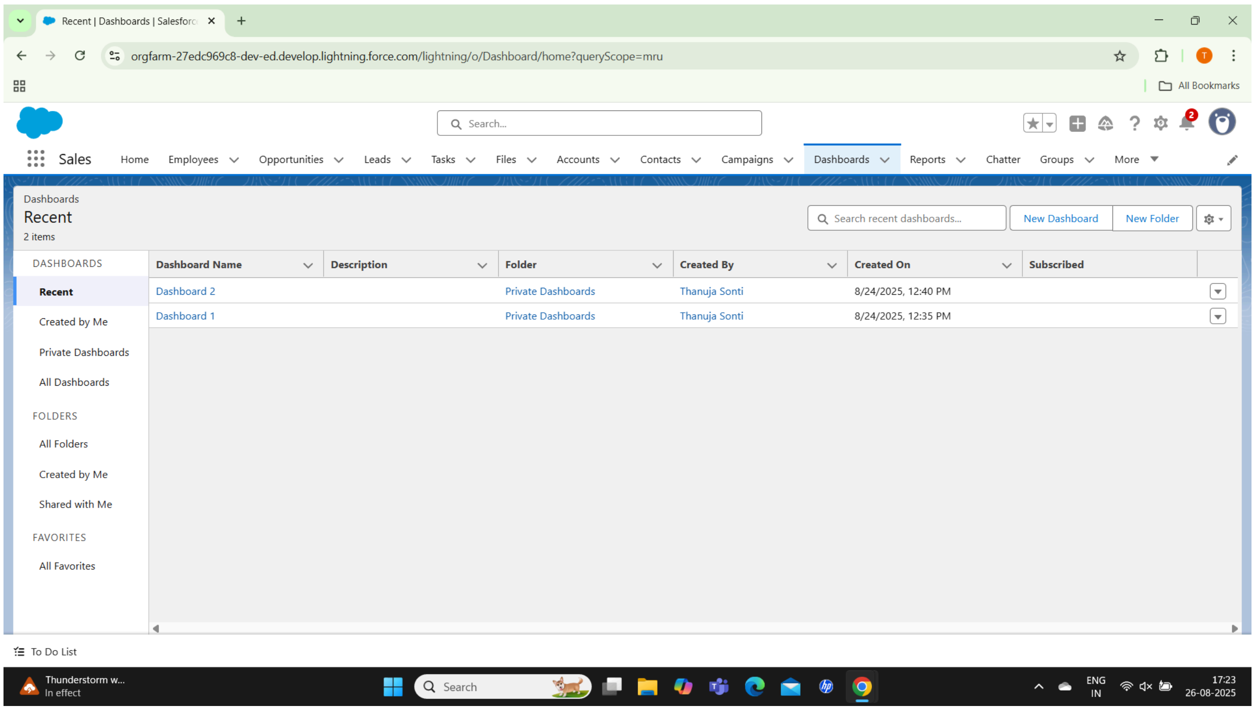
Dashboards

Activity 1: Create Dashboard

1. Go to the app --> click on the Dashboards tabs.
2. Give a Name and click on Create.
3. Select add component.
4. Select a Report and click on select.
5. Click Add then click on Save and then click on Done.

Activity 2:

Create another Dashboard as we discussed in activity 1.



Approval Process

Activity 1:

Create the leave object with the fields as shown in the below figure.

Activity 2:

Create an Approval Process for Leave object.

1. Go to Setup --> type Approval Processes in quick find --> click on Approval Processes.
2. In the Manage Approval Processes For list, select Leave.
3. Click Create New Approval Process and select Use Jump Start Wizard.

4. Enter the following parameters
   Add a screenshot here
5. Click Save.
6. Click View Approval Process Detail Page.

Activity 3:

1. Under initial submission action click on add new and then select field update.
2. Give name as “Approval Status to Submitted”.
   Select Status for the field to update.
   Under specify new field value select “A specific value” and select submitted and click Save.

Activity 4:

1. While you are still on Leave Approval Request detail page,
   Under approval steps click the new approval step.
2. Give the name as “Approval from HR” and click on next.
3. Under specify step criteria select “Enter this step if the following (Criteria are met)”,
   Select field : “Leave: No. of Days”,
   Operator : equals
   Value : 5
4. Click next.
5. Under select approver : select Automatically assign to approver(s) and for users select the name of the user with the HR role.
6. Click on Save.
7. No, I'll do this later. Take me to the approval process detail page to review what I've just created and click Go.

Activity 5:

1. Under initial submission action click on add new and then select field update.
2. Give name as “Approval Status to Approved”.
   Select Status for the field to update.
   Under specify new field value select “A specific value” and select Approved and

click Save.

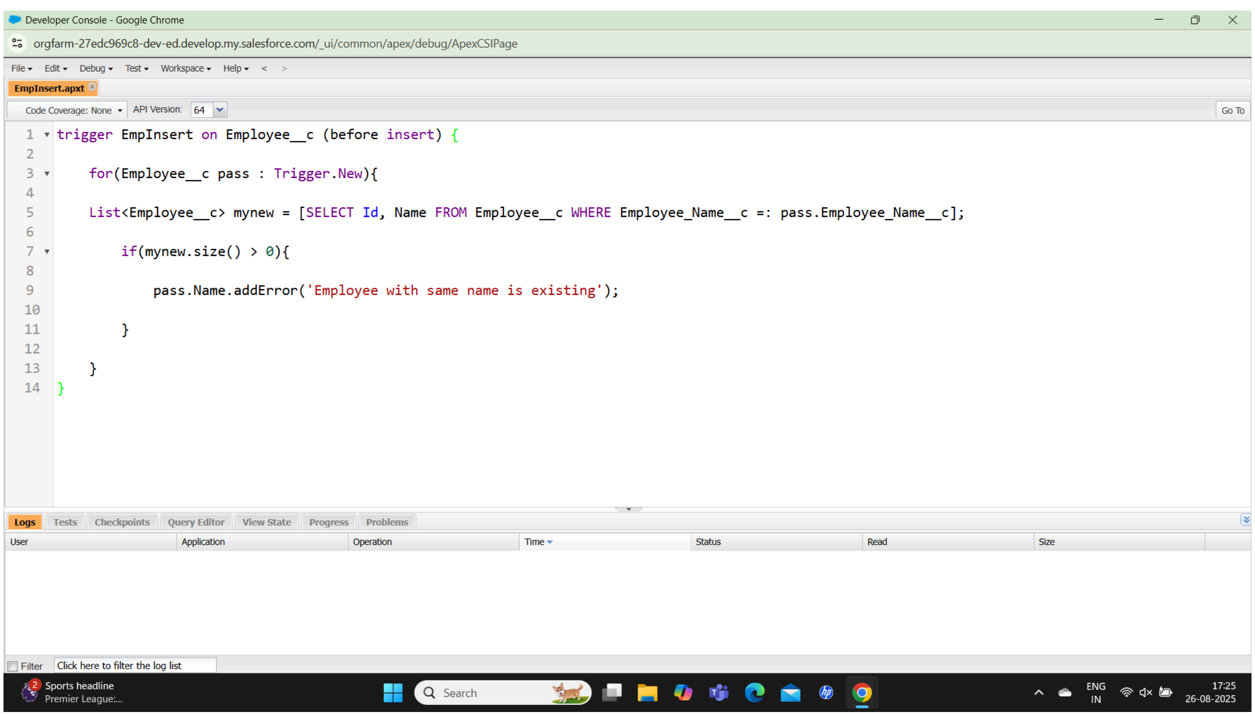
Activity 6:

1. Under initial submission action click on add new and then select field update.
2. Give name as “Approval Status to Rejected”.
   Select Status for the field to update.
   Under specify new field value select “A specific value” and select Rejected and click Save.

Apex Trigger

Activity 1 : Create an Apex Trigger

1. To create a new Apex Class follow the below steps:
   Click on the file --> New --> Apex Class.
2. Give the Apex Trigger name as “EmpInsert”, and select “Employee__c” from the dropdown for sObject.
3. Click Submit.
4. Now write the code logic here

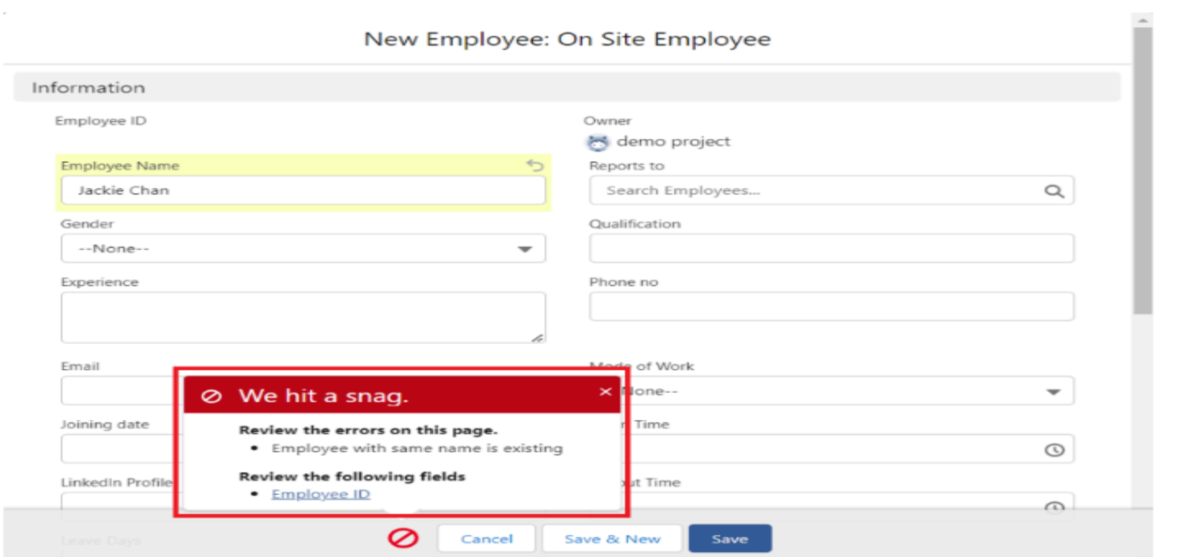


Code Snippet:

5. Code Snippet:
trigger EmpInsert on Employee__c (before insert) {
6. for(Employee__c pass : Trigger.New){
7. List<Employee__c> mynew = [SELECT Id, Name FROM Employee__c WHERE Employee_Name__c =: pass.Employee_Name__c];
8. if(mynew.size() > 0){
9. pass.Name.addError('Employee with same name is existing');
10. }
11. }
}
12. Save the code.(click on file --> Save)

Activity 2 : Testing the Trigger

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”.



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