

PROJECT REPORT

STREAMLINED EMPLOYEE DETAIL MANAGEMENT

SUBMITTED BY

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TASK 1

PROJECT SPECIFICATIONS

STREAMLINED EMPLOYEE DETAIL MANAGEMENT:

Streamlined Employee Detail Management system helps improve employee satisfaction and productivity to help a company achieve their overall goals. These tools help monitor, assess and control employee's working hours and efficiently utilise human resources. It is the process by which employers ensure workers perform their jobs to the best of their abilities so as to achieve business goals. It typically entails building and maintaining healthy relationships with employees, as well as monitoring their daily labour and measuring progress.

GOALS OF STREAMLINED EMPLOYEE DETAIL MANAGEMENT:

The employee management system should help the organization streamline and automate time management operations. It should come with a robust management system that enables employees make leave requests from wherever they work and also they will be able to know about their shift information .

Employees are considered as the users and they will be able to create, edit and delete the records according to the permissions offered by the administrators.

Reports and dashboards are a key Salesforce feature that give us the data we need to see the big picture and make informed business decisions.

Anyone at the organization with access to the Salesforce instance can make reports and dashboards, so the burden is not all on the Salesforce admin.

Organizations that succeed in employee management will make it a point to organize regular performance reviews, recognize good work, set clear expectations, and offer training opportunities. With proper support, employees can better understand their strengths, recognize any weak points, and successfully apply feedback.

SCOPE OF STREAMLINED EMPLOYEE DETAIL MANAGEMENT:

The purpose of an employee management system is to help improve workforce productivity, identify ways to engage and retain talent, and alleviate administrative burdens for HR professionals. Achieving greater efficiency through the use of technology can also help control costs and minimize compliance risks.

TECHNICAL AND FUNCTIONAL REQUIREMENTS:

TECHNICAL REQUIREMENTS:

Technical requirements come from a number of sources including

- 1) Functional
- 2) Performance
- 3) Interface
- 4) Environmental
- 5) Safety
- 6) Human interfaces
- 7) Standards such as reliability, sustainability, producibility and others.

FUNCTIONAL REQUIREMENTS:

Functional requirements include Lightning app creation, creation of objects, fields and tabs, creation of records in the respective objects.

Creating relationships between the objects. It also involves the creation of E-mail templates, Users, Approval process, flows, reports and dashboards and apex coding phase.

TASK 2

PREPARATION DATA MODELLING

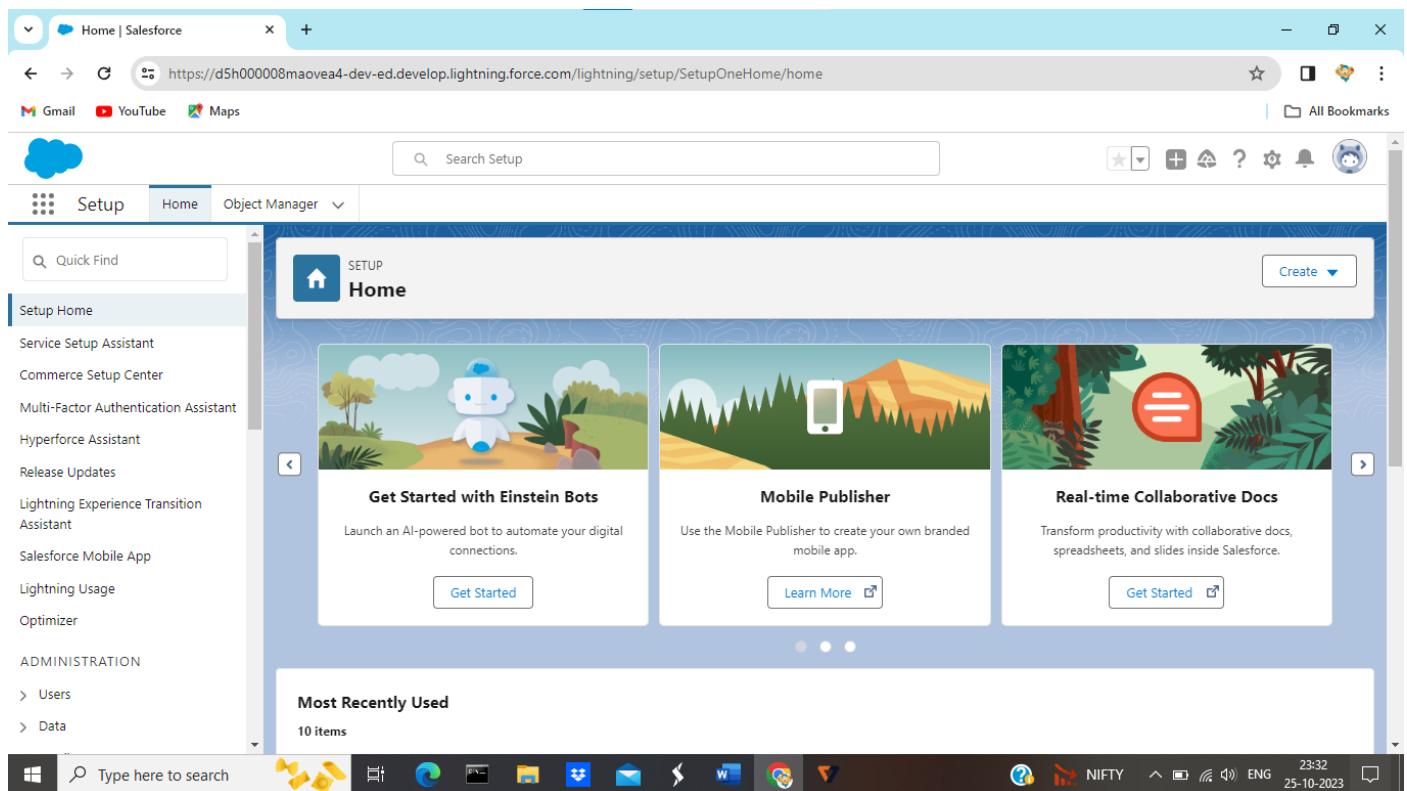
SALESFORCE

CREATING DEVELOPER ACCOUNT

Created the developer account in salesforce.

ACCOUNT ACTIVATION

Activated the account through the email verification process. Here is the home page of salesforce developer account.



OBJECTS

CREATION OF EMPLOYEE OBJECT

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main area is titled "Employee" under "SETUP > OBJECT MANAGER". It displays the "Details" tab for the Employee object. The API Name is set to "Employee__c". Under the "Custom" section, "Singular Label" is set to "Employee" and "Plural Label" is set to "Employees". On the right, there are checkboxes for enabling Reports, Activities, and Field History, all of which are checked. Deployment status is set to "Deployed". Help settings point to the standard Salesforce help window. At the bottom right are "Edit" and "Delete" buttons.

CREATION OF ORGANIZATION OBJECT

The screenshot shows the Salesforce Object Manager interface. The sidebar and main area are identical to the Employee object creation screen. The API Name is set to "Organization__c". Under the "Custom" section, "Singular Label" is set to "Organization" and "Plural Label" is set to "Organizations". The configuration for Reports, Activities, and Field History is identical to the Employee object, with all checkboxes checked. Deployment status is set to "Deployed". Help settings point to the standard Salesforce help window. At the bottom right are "Edit" and "Delete" buttons.

CREATION OF HEALTH INSURANCE OBJECT

The screenshot shows the Salesforce Object Manager interface for creating a new object named "Health Insurance".

Object Details:

- API Name:** Health_Insurance__c
- Custom:** ✓
- Singular Label:** Health Insurance
- Plural Label:** Health Insurances

Object Settings:

- Enable Reports:** ✓
- Track Activities:** ✓
- Track Field History:** ✓
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

Navigation: The left sidebar lists various setup categories like Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The top navigation bar includes links for Gmail, YouTube, Maps, and All Bookmarks.

CREATION OF LEAVE OBJECT

The screenshot shows the Salesforce Object Manager interface for creating a new object named "Leave".

Object Details:

- API Name:** Leave__c
- Custom:** ✓
- Singular Label:** Leave
- Plural Label:** Leaves

Object Settings:

- Enable Reports:** ✓
- Track Activities:** ✓
- Track Field History:** ✓
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

Navigation: The left sidebar lists various setup categories like Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The top navigation bar includes links for Gmail, YouTube, Maps, and All Bookmarks.

TABS

CREATION OF A CUSTOM TAB

CREATION OF REMAINING TABS

We have created the custom tabs for the custom objects such as Employee, Organization, Health Insurance, Leave.

The screenshot shows the Salesforce Setup interface with the 'Custom Object Tabs' page open. The left sidebar has 'User Interface' expanded, with 'Rename Tabs and Labels' and 'Tabs' selected. The main content area displays a table titled 'Custom Object Tabs' with columns for 'Action', 'Label', 'Tab Style', and 'Description'. The table lists various custom tabs, each with an 'Edit | Del' link and a unique icon. The tabs include Accounts (Credit card), Activities (Star), Classes (Lightning), Departments (Presenter), Employees (Sun), Health Insurances (Hands), Leaves (Castle), Organizations (Computer), Students (Diamond), and Subjects (Books).

Action	Label	Tab Style	Description
Edit Del	Accounts	Credit card	
Edit Del	Activities	Star	
Edit Del	Classes	Lightning	
Edit Del	Departments	Presenter	
Edit Del	Employees	Sun	
Edit Del	Health Insurances	Hands	
Edit Del	Leaves	Castle	
Edit Del	Organizations	Computer	
Edit Del	Students	Diamond	
Edit Del	Subjects	Books	

THE LIGHTNING APP

CREATE A LIGHTNING APP

We have created the lightning app required for our project named STREAMLINED EMPLOYEE DETAIL MANAGEMENT .

The lightning app name is EMPLOYEE MAPP.

In this, we added the objects which we was created earlier.

We select the system administrator profile. And also we add all the necessary features to that.

Recently Viewed | Employees | Employee Mapp - Lightning A...

https://d5h000008maovea4-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u5h000002hyXZAA&retUrl=https%3A%2F%2Fd5h000008maovea4...

Gmail YouTube Maps All Bookmarks

Lightning App Builder App Settings Pages Employee Mapp Help

App Settings

App Details & Branding

App Options Utility Items (Desktop Only) Navigation Items User Profiles

App Details

* App Name: Employee Mapp

* Developer Name: Employee_Mapp

Description: This application captures the details of the employees

App Branding

Image: Primary Color Hex Value: #0070D2

Clear

Org Theme Options: Use the app's image and color instead of the org's custom theme

App Launcher Preview

Type here to search

Employee Mapp This application captures the details of the employees

Result ENG 00:04 26-10-2023

Recently Viewed | Employees |

https://d5h000008maovea4-dev-ed.develop.lightning.force.com/lightning/o/Employee__c/list?filterName=Recent

Gmail YouTube Maps All Bookmarks

Employee Mapp Employees Organizations Health Insurances Leaves Reports Dashboards

Employees Recently Viewed

11 items • Updated a few seconds ago

	Employee Name	Action
1	M.Mallika Devi	
2	S.Abarna	
3	S.Akshu	
4	J.Jasmine	
5	S.Harini	
6	S.Jose	
7	A.Sam	
8	D.Umesh	
9	S.Kesav	
10	D.Abi	
11	S.Muthuveni	

Search this list... New Import

Type here to search

NIFT... ENG 23:59 25-10-2023

FIELDS

CREATING JUNCTION OBJECT

We have created the junction object as employee details with organization and health insurance. For that, we created two master-detail relationships for employees with organization and health insurance.

The screenshot shows the Salesforce Object Manager interface for the 'Employee' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. Two red arrows point from the text 'Fields & Relationships' to the 'Fields & Relationships' section in the sidebar and to the 'Organization' row in the main list. The main area displays a table of fields and their properties:

Field	Type	Description	Relationship
Health Insurance	Health_Insurance__c		Master-Detail(Health Insurance)
Health Insurance Name	Health_Insurance_Name__c		Lookup(Health Insurance)
Health Issues If Any	Health_Issues_If_Any__c		Checkbox
Last Modified By	LastModifiedById		Lookup(User)
Name	Name__c		Text(80)
Organization	Organization__c		Master-Detail(Organization)
Phone Number	Phone_Number__c		Phone

The screenshot shows the 'Employee Mapp' page for the employee 'S.Akshu'. The top navigation bar includes links for Employees, Organizations, Health Insurances, Leaves, Reports, and Dashboards. The main content area has tabs for 'Related' and 'Details'. The 'Details' tab is active, showing fields for Employee Name (S.Akshu), Organization (Accenture), and Health Insurance (-.007). To the right, there is an 'Activity' sidebar with a calendar icon, a list of activity types, and filters for 'All time • All activities • All types'. It also includes buttons for 'Refresh', 'Expand All', and 'View All'.

CREATING A MASTER-DETAIL RELATIONSHIP

We have created master-detail relationship with employees and organization.

Employee

Fields & Relationships

Field Label	API Name	Type
Health_Issues_If_Any	Health_Issues_If_Any__c	Checkbox
Last_Modified_By	LastModifiedById	Lookup(User)
Name	Name_c	Text(80)
Organization	Organization_c	Master-Detail(Organization)
Phone_Number	Phone_Number_c	Phone
Salary	Salary_c	Currency(18, 0)
Shift_Timings	Shift_Timings_c	Picklist

Employee Mapp

Organizations

Related

Notes & Attachments (0)

Employees (2)

Employee: Employee Name

J.Jasmine

S.Kesav

View All

Activity

Upcoming & Overdue

No activities to show.

No past activity. Past meetings and tasks marked as done show up here.

CREATING LOOKUP RELATIONSHIP

We have created look up relationship with employees and health insurance.

The screenshot shows the Salesforce Object Manager for the 'Employee' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. A red arrow points to the 'Fields & Relationships' section in the main content area. The table lists fields such as Existing Health Insurance, Gender, Health Insurance, and Health Insurance Name. The 'Health Insurance Name' field is highlighted with a red arrow, indicating it is the focus of the lookup relationship creation.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Existing Health Insurance	Existing_Health_Insurance__c	Checkbox		
Gender	Gender__c	Picklist		
Health Insurance	Health_Insurance__c	Master-Detail(Health Insurance)		
Health Insurance Name	Health_Insurance_Name__c	Lookup(Health Insurance)		
Health Issues If Any	Health_Issues_If_Any__c	Checkbox		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(80)		

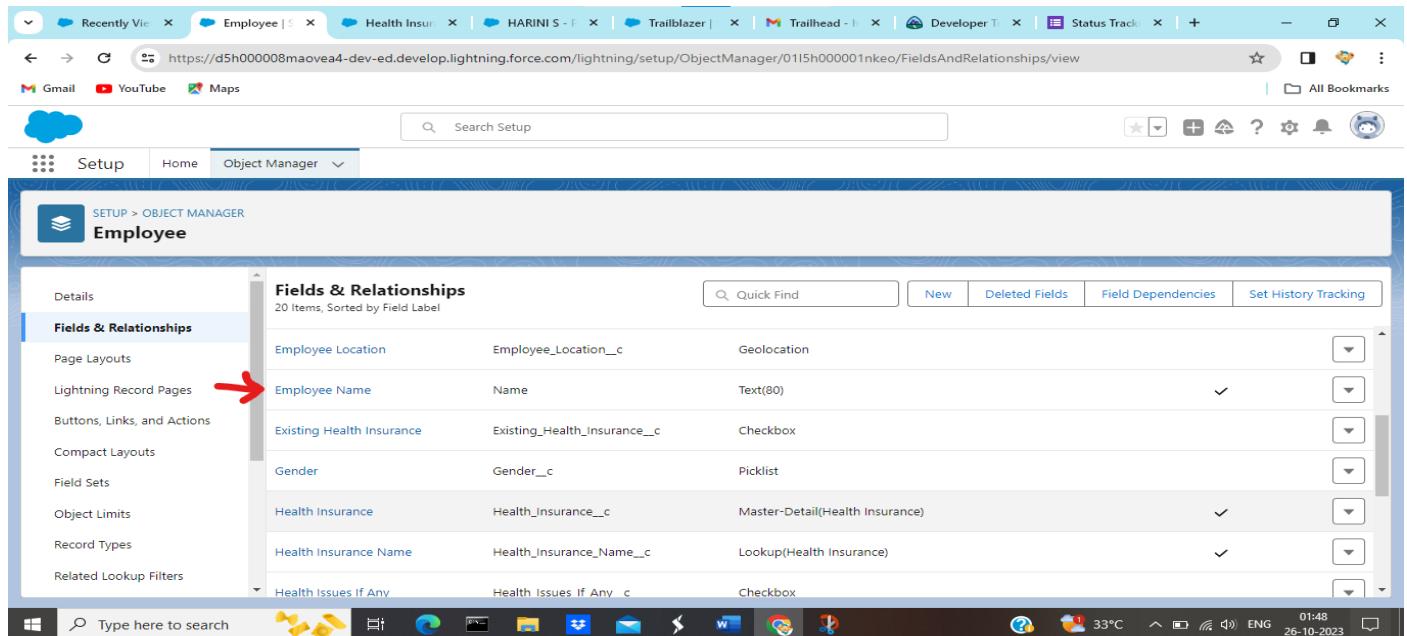
Also we have created look up relationship with leave object and employee object.

The screenshot shows the Salesforce Object Manager for the 'Leave' object. Similar to the previous screenshot, it has a sidebar with setup options and a main content area for 'Fields & Relationships'. A red arrow points to the 'Fields & Relationships' section. The table lists fields like Created By, Duration, Employee name, End Date, Last Modified By, Leave, and Leave Status. The 'Employee name' field is highlighted with a red arrow, indicating it is the focus of the lookup relationship creation.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Duration	Duration__c	Formula (Number)		
Employee name	Employee_name__c	Lookup(Employee)		
End Date	End_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Leave	Name	Auto Number		
Leave Status	Leave_Status__c	Picklist		

CREATING TEXT FIELD

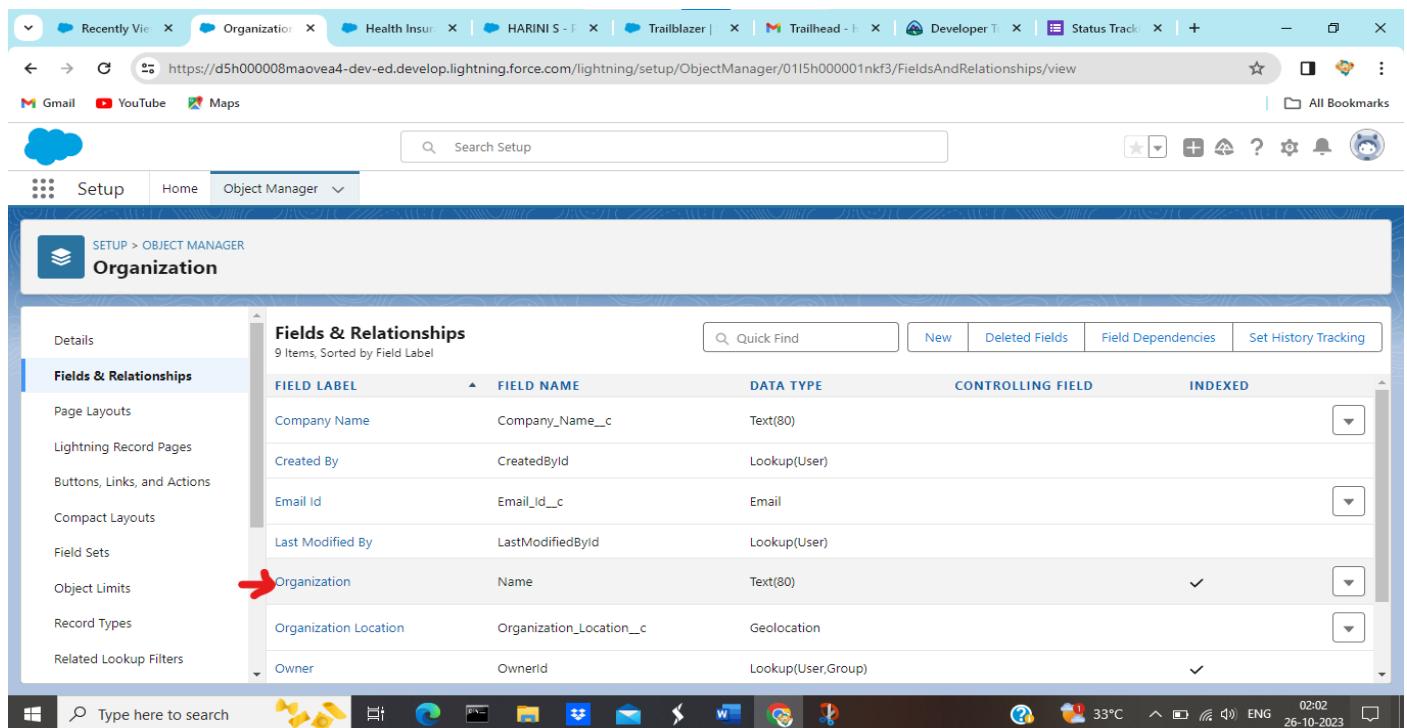
We have created various text fields for various objects. For employee object, We created employee name as a text field.



The screenshot shows the Salesforce Setup interface. The URL is <https://d5h000008maovea4-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015h000001nkeo/FieldsAndRelationships/view>. The page title is "Employee". The sidebar on the left has a "Fields & Relationships" section with a red arrow pointing to the "Lightning Record Pages" link. The main content area shows a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE
Employee Location	Employee_Location__c	Geolocation
Employee Name	Name	Text(80)
Existing Health Insurance	Existing_Health_Insurance__c	Checkbox
Gender	Gender__c	Picklist
Health Insurance	Health_Insurance__c	Master-Detail(Health Insurance)
Health Insurance Name	Health_Insurance_Name__c	Lookup(Health Insurance)
Health Issues If Any	Health_Issues_If_Any__c	Checkbox

For organization object, we created organization (name) as a text field .



The screenshot shows the Salesforce Setup interface. The URL is <https://d5h000008maovea4-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015h000001nkf3/FieldsAndRelationships/view>. The page title is "Organization". The sidebar on the left has a "Fields & Relationships" section with a red arrow pointing to the "Organization" link. The main content area shows a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Company Name	Company_Name__c	Text(80)		
Created By	CreatedById	Lookup(User)		
Email Id	Email_Id__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Organization	Name	Text(80)		
Organization Location	Organization_Location__c	Geolocation		
Owner	OwnerId	Lookup(User,Group)		

For health insurance object, we created name of the health insurance as a text field .

The screenshot shows the Salesforce Object Manager interface for the 'Health Insurance' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Buttons, with a red arrow pointing to the 'Fields & Relationships' section. The main area displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Insurance Company Id	Name	Auto Number		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Name	Name_c	Text(40)		
Owner	OwnerId	Lookup(User,Group)		✓

CREATING THE PHONE FIELD

We have created the phone field for the objects: employees and organizations.

The screenshot shows the Salesforce Object Manager interface for the 'Employee' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Buttons, with a red arrow pointing to the 'Fields & Relationships' section. The main area displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Last Modified By	LastModifiedBy	Lookup(User)		
Name	Name_c	Text(80)		
Organization	Organization_c	Master-Detail(Organization)		✓
Phone Number	Phone_Number_c	Phone		
Salary	Salary_c	Currency(18, 0)		
Shift Timings	Shift_Timings_c	Picklist		
Travel Allowance	Travel_Allowance_c	Checkbox		

Recently Viewed | Employees | Health Insurance | Salesforce | Organization | Salesforce | Trailhead - hariniharini6531@gmail.com | +

https://d5h000008maovea4-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Ih000001nkf3/FieldsAndRelationships/view

Gmail YouTube Maps All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER
Organization

Details Fields & Relationships 9 Items, Sorted by Field Label

Fields & Relationships

Email Id	Email_Id__c	Email	
Last Modified By	LastModifiedById	Lookup(User)	
Organization	Name	Text(80)	✓
Organization Location	Organization_Location__c	Geolocation	
Owner	OwnerId	Lookup(User,Group)	✓
Phone Number	Phone_Number__c	Phone	
Website	Website__c	URL(255)	

CREATING THE EMAIL FIELD

We have created Email field for the objects, employee and organization.

Recently Viewed | Employees | Health Insurance | Salesforce | Employee | Salesforce | Trailhead - hariniharini6531@gmail.com | +

https://d5h000008maovea4-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Ih000001nko/FieldsAndRelationships/view

Gmail YouTube Maps All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER
Employee

Details Fields & Relationships 20 Items, Sorted by Field Label

Fields & Relationships

Date of birth	Date_of_birth__c	Date	
Designation	Designation__c	Picklist	
Distance	Distance__c	Formula (Number)	
Email Id	Email_Id__c	Email	
Employee Location	Employee_Location__c	Geolocation	
Employee Name	Name	Text(80)	✓
Existing Health Insurance	Existing_Health_Insurance__c	Checkbox	

Recently Viewed | Employees | Health Insurance | Salesforce | Organization | Salesforce | Trailhead - hariniharini6531@gmail.com | +

<https://d5h000008maovea4-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Ih000001nkf3/FieldsAndRelationships/view>

Gmail YouTube Maps All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER
Organization

Details Fields & Relationships 9 Items, Sorted by Field Label

Page Layouts Email Id Email

Lightning Record Pages Last Modified By LastModifiedById

Buttons, Links, and Actions Organization Name Text(80)

Compact Layouts Organization Location Organization_Location__c Geolocation

Field Sets Owner OwnerId Lookup(User,Group)

Object Limits Phone Number Phone_Number__c Phone

Record Types Website Website__c URL(255)

Related Lookup Filters

CREATING PICKLIST FIELD

We have created various picklist field for the objects, employee and leave.

Recently Viewed | Employees | Health Insurance | Salesforce | Employee | Salesforce | Trailhead - hariniharini6531@gmail.com | +

<https://d5h000008maovea4-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Ih000001nko/FieldsAndRelationships/view>

Gmail YouTube Maps All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER
Employee

Details Fields & Relationships 20 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Age	Age__c	Formula (Number)		
Created By	CreatedBy	Lookup(User)		
Date of birth	Date_of_birth__c	Date		
Designation	Designation__c	Picklist		
Distance	Distance__c	Formula (Number)		
Email Id	Email_Id__c	Email		

Screenshot of the Salesforce Object Manager page for the Employee object.

The page title is "Employee" under "SETUP > OBJECT MANAGER".

The left sidebar shows the "Fields & Relationships" section selected.

The main content area displays the "Fields & Relationships" table:

Last Modified By	LastModifiedById	Lookup(User)
Name	Name_c	Text(80)
Organization	Organization_c	Master-Detail(Organization)
Phone Number	Phone_Number_c	Phone
Salary	Salary_c	Currency(18, 0)
Shift Timings	Shift_Timings_c	Picklist
Travel Allowance	Travel_Allowance_c	Checkbox

A red arrow points to the "Shift Timings" row.

Screenshot of the Salesforce Object Manager page for the Employee object.

The page title is "Employee" under "SETUP > OBJECT MANAGER".

The left sidebar shows the "Fields & Relationships" section selected.

The main content area displays the "Fields & Relationships" table:

Employee Location	Employee_Location_c	Geolocation
Employee Name	Name	Text(80)
Existing Health Insurance	Existing_Health_Insurance_c	Checkbox
Gender	Gender_c	Picklist
Health Insurance	Health_Insurance_c	Master-Detail(Health Insurance)
Health Insurance Name	Health_Insurance_Name_c	Lookup(Health Insurance)
Health Issues If Any	Health_Issues_If_Any_c	Checkbox

A red arrow points to the "Gender" row.

Recently Viewed | Employees | Health Insurance | Salesforce | Leave | Salesforce | Trailhead - hariniharini6531@gmail.com

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Leave

Fields & Relationships

Employee name	Employee_name_c	Lookup(Employee)	✓
End Date	End_Date_c	Date	▼
Last Modified By	LastModifiedById	Lookup(User)	▼
Leave	Name	Auto Number	✓
Leave Status	Leave_Status_c	Picklist	▼
Leave Type	Leave_Type_c	Picklist	▼
Owner	OwnerId	Lookup(User,Group)	✓
Start Date	Start_Date_c	Date	▼

Type here to search

CREATING CURRENCY FIELD

We have created the currency field in employee object and labelled it as Salary.

Recently Viewed | Employees | Health Insurance | Salesforce | Employee | Salesforce | Trailhead - hariniharini6531@gmail.com

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Employee

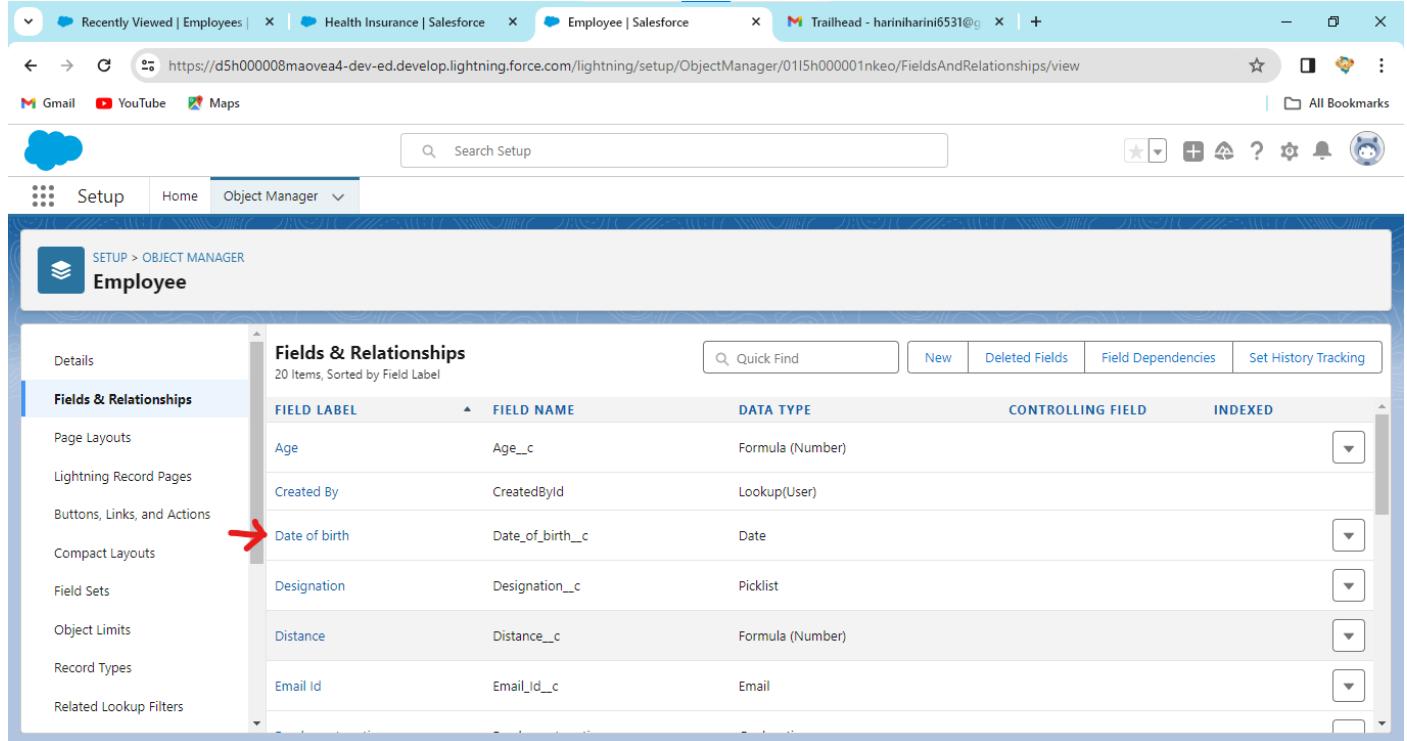
Fields & Relationships

Last Modified By	LastModifiedById	Lookup(User)	▼
Name	Name_c	Text(80)	▼
Organization	Organization_c	Master-Detail(Organization)	✓
Phone Number	Phone_Number_c	Phone	▼
Salary	Salary_c	Currency(18, 0)	▼
Shift Timings	Shift_Timings_c	Picklist	▼
Travel Allowance	Travel_Allowance_c	Checkbox	▼

Type here to search

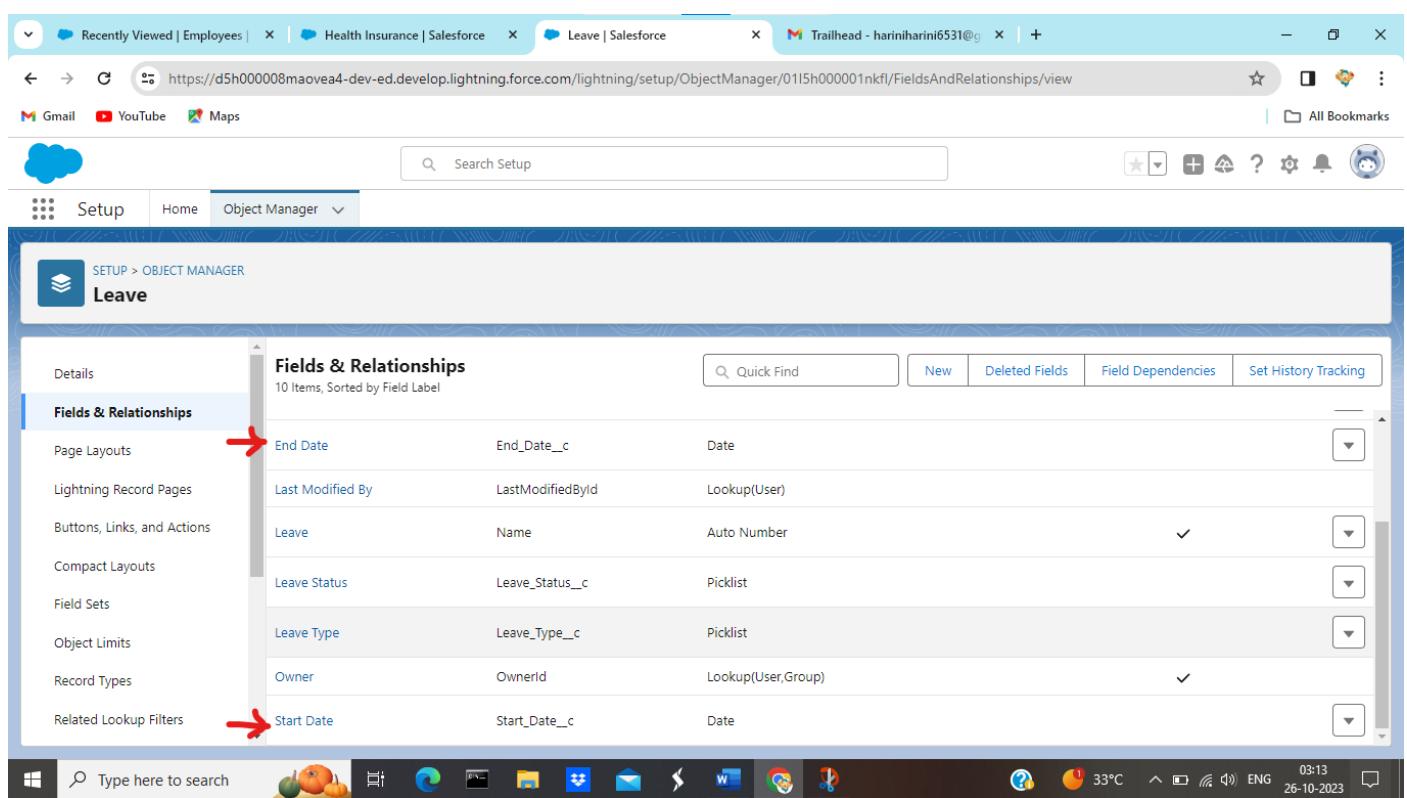
CREATING DATE FIELD

We have created date field in the employee object and labelled it as Date of Birth and also created date field in leave object and labelled it as start date and end date.



The screenshot shows the Salesforce Setup interface for the Employee object. The left sidebar is collapsed, showing options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and lists 20 items. The 'Date of birth' field is highlighted with a red arrow. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Age	Age__c	Formula (Number)		
Created By	CreatedBy	Lookup(User)		
Date of birth	Date_of_birth__c	Date		
Designation	Designation__c	Picklist		
Distance	Distance__c	Formula (Number)		
Email Id	Email_Id__c	Email		



The screenshot shows the Salesforce Setup interface for the Leave object. The left sidebar is collapsed, showing options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and lists 10 items. Two fields are highlighted with red arrows: 'End Date' and 'Start Date'. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	INDEXED
End Date	End_Date__c	Date	
Last Modified By	LastModifiedBy	Lookup(User)	
Leave	Name	Auto Number	✓
Leave Status	Leave_Status__c	Picklist	
Leave Type	Leave_Type__c	Picklist	
Owner	OwnerId	Lookup(User,Group)	✓
Start Date	Start_Date__c	Date	

CREATING URL FIELD

We have created the URL field in the organization object and labelled it as Website.

The screenshot shows the Salesforce Setup interface under the Object Manager for the Organization object. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, etc. A red arrow points from the sidebar to the 'Website' row in the main table. The table lists fields with their labels and types: Email Id (Email), Last Modified By (Lookup(User)), Organization (Name), Organization Location (Geolocation), Owner (Lookup(User,Group)), Phone Number (Phone), and Website (URL(255)).

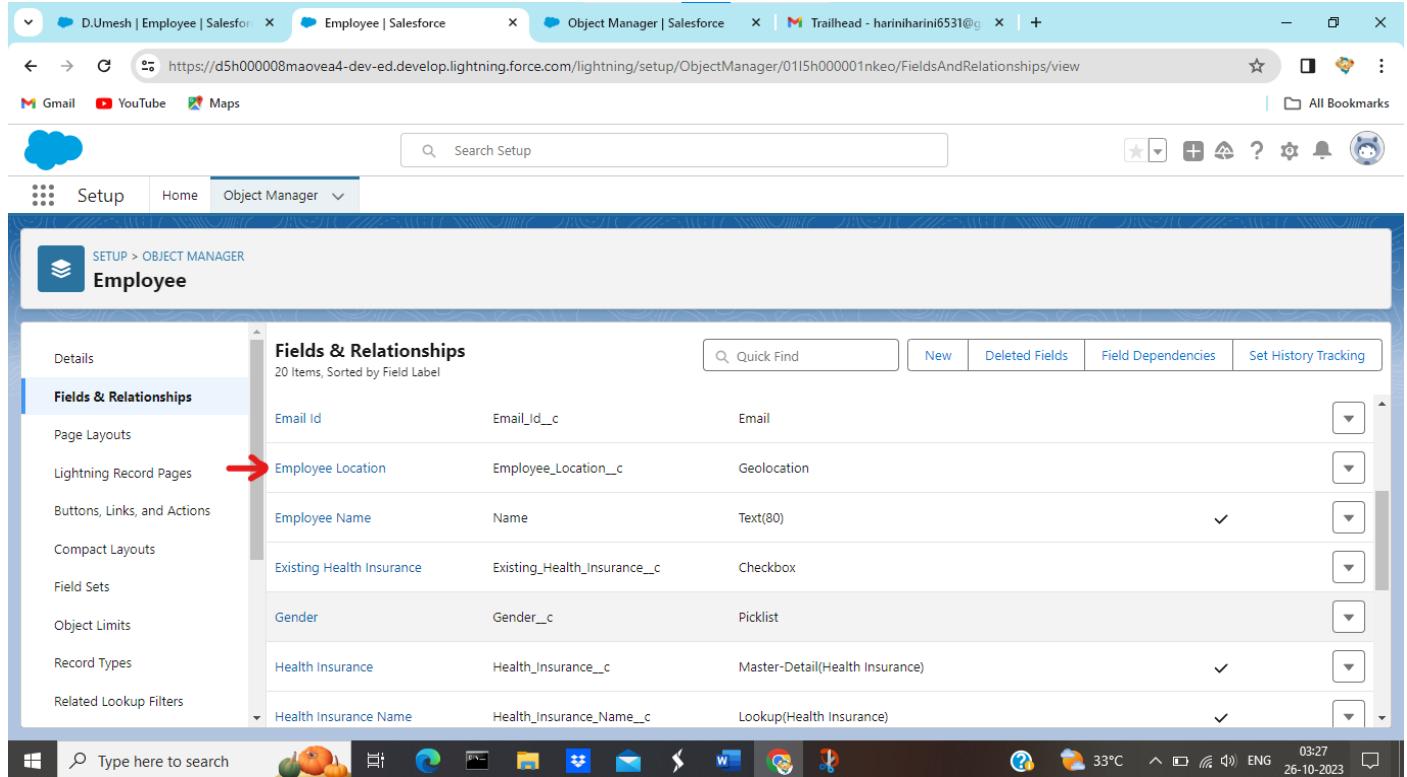
CREATING CHECKBOX FIELD

We have created the several checkbox field in employee object .

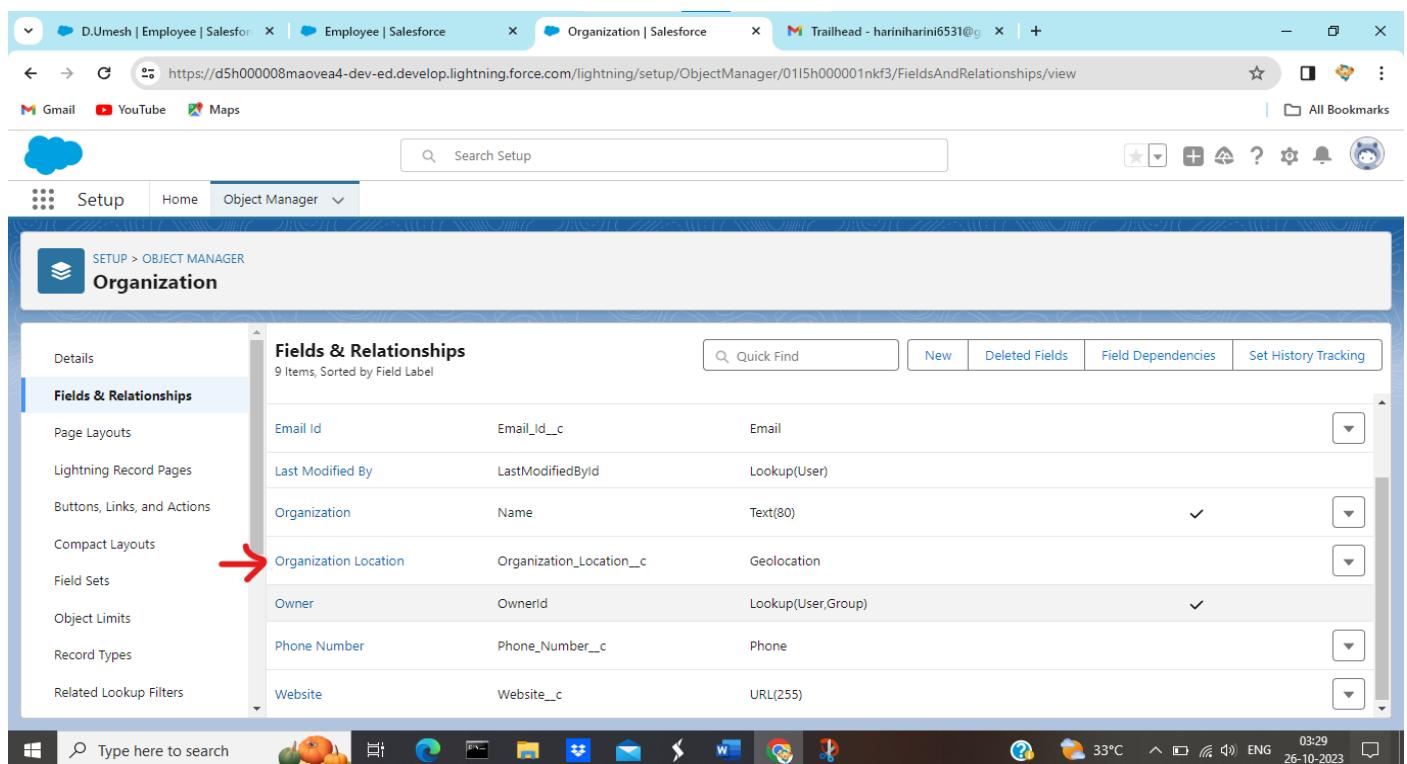
The screenshot shows the Employee Mapp application interface. On the left, a sidebar lists navigation items: Employees, Organizations, Health Insurances, Leaves, Reports, and Dashboards. The main area displays an employee record for 'D.Umesh'. The 'Health Issues If Any' section contains three checkboxes: 'Health Issues If Any' (checked), 'Existing Health Insurance' (checked), and 'Travel Allowance' (checked). Other fields include 'Employee Location' (12.42384756457851, 36.23894738754853), 'Age' (26.47), 'Distance' (3.457.90), 'Created By' (Harini S., 25/10/2023, 12:29 pm), and 'Last Modified By' (Harini S., 29/10/2023, 8:37 am).

CREATING GEOLOCATION FIELD

We have created the geolocation field in the employee and organization object and labelled it as Employee Location and Organization Location respectively.



The screenshot shows the Salesforce setup interface for the Employee object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main area displays the 'Fields & Relationships' section with 20 items. A red arrow points to the 'Employee Location' row, which has a field label of 'Employee Location', a field name of 'Employee_Location__c', and a type of 'Geolocation'. Other fields listed include Email Id, Employee Name, Existing Health Insurance, Gender, Health Insurance, and Health Insurance Name.



The screenshot shows the Salesforce setup interface for the Organization object. Similar to the Employee page, it has a sidebar with configuration options and a main area for 'Fields & Relationships'. A red arrow points to the 'Organization Location' row, which has a field label of 'Organization Location', a field name of 'Organization_Location__c', and a type of 'Geolocation'. Other fields listed include Email Id, Last Modified By, Organization, Owner, Phone Number, and Website.

CREATING FORMULA FIELD

We have created the formula field in Employee object and Leave object and labelled it as Distance and Duration respectively in order to calculate the distance and duration of leave .

The screenshot shows the Salesforce Object Manager interface for the 'Employee' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. A red arrow points from the 'Fields & Relationships' category in the sidebar to the corresponding section in the main content area. The main content displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedById	Lookup(User)
Date of birth	Date_of_birth_c	Date
Designation	Designation_c	Picklist
Distance	Distance__c	Formula (Number)
Email Id	Email_Id_c	Email
Employee Location	Employee_Location_c	Geolocation
Employee Name	Name	Text(80)

The screenshot shows the Salesforce Object Manager interface for the 'Leave' object. The left sidebar lists various setup categories. A red arrow points from the 'Fields & Relationships' category in the sidebar to the corresponding section in the main content area. The main content displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Duration	Duration__c	Formula (Number)		
Employee name	Employee_name_c	Lookup(Employee)		✓
End Date	End_Date_c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Leave	Name	Auto Number		✓
Leave Status	Leave_Status_c	Picklist		

CREATING VALIDATION RULE

We have created validation rule in employee object for travel allowances field. The condition is ,if the distance is greater than 15, then travel allowance is required.

The screenshot shows the Salesforce Lightning Experience interface. A validation rule error message is displayed for the 'Travel Allowance' field: "Distance is greater than 15 you should select travel allowance required".

Employee Name
A.Sam
D.Umesh
S.Akshu
M.Mallika Devi
S.Abarna
J.Jasmine
S.Harini
S.Jose
S.Kesav
D.Abi
S.Muthuveni

USER ADOPTION

CREATE RECORDS FOR THE EMPLOYEE OBJECT

We have created several records for the Employee object.

The screenshot shows the Salesforce Lightning Experience interface with the 'Employees' list view. The list contains 12 items, each with a checkbox and a name:

Employee Name
A.Sam
D.Umesh
S.Akshu
M.Mallika Devi
S.Abarna
J.Jasmine
S.Harini
S.Jose
S.Kesav
S.Veni

CREATE RECORDS FOR THE ORGANIZATION OBJECT

We have created various records for the Organization object.

The screenshot shows the Salesforce Lightning interface with the URL https://d5h000008maovea4-dev-ed.develop.lightning.force.com/lightning/o/Organization_c/list?filterName=Recent. The page title is "Recently Viewed | Organization". The top navigation bar includes links for Employee Mapp, Employees, Organizations (selected), Health Insurances, Leaves, Reports, and Dashboards. The main content area displays a "Recently Viewed" list for the Organization object, showing 11 items updated a few seconds ago. The list includes entries for Oracle, Apple, HP, Accenture, Intel, TCS, Wipro, SmartBridge, Infosys, IBM, and Microsoft Corporation. Each entry has a checkbox and a dropdown menu icon. A search bar at the top right allows searching within the list. The bottom of the screen shows the Windows taskbar with various pinned icons and system status.

CREATE RECORDS FOR THE HEALTH INSURANCE OBJECT

We have created several records for the Health Insurance object.

The screenshot shows the Salesforce Lightning interface with the URL https://d5h000008maovea4-dev-ed.develop.lightning.force.com/lightning/o/Health_Insurance_c/list?filterName=Recent. The page title is "Recently Viewed | Health Insurance". The top navigation bar includes links for Employee Mapp, Employees, Organizations, Health Insurances (selected), Leaves, Reports, and Dashboards. The main content area displays a "Recently Viewed" list for the Health Insurance object, showing 11 items sorted by Insurance Company Id and updated a few seconds ago. The list includes entries for -001 through -011. Each entry has a checkbox and a dropdown menu icon. A search bar at the top right allows searching within the list. The bottom of the screen shows the Windows taskbar with various pinned icons and system status.

CREATE RECORDS FOR THE LEAVE OBJECT

We have created several records for the leave object.

The screenshot shows a web browser window with the following details:

- Title Bar:** Recently Viewed | Leaves | Sale
- URL:** https://d5h000008maovea4-dev-ed.develop.lightning.force.com/lightning/o/Leave__c/list?filterName=Recent
- Toolbar:** Back, Forward, Stop, Refresh, Home, Address Bar, Bookmarks, All Bookmarks, Help, Settings, Notifications, User Profile.
- Header:** Leaves, Employee Mapp, Employees, Organizations, Health Insurances, Leaves (highlighted), Reports, Dashboards.
- Section:** Leaves - Recently Viewed
- Content:** A list of 11 items, each with a checkbox and a number followed by a dash and a two-digit number (e.g., 1 -020, 2 -019, ..., 11 -008). Each item has a small downward arrow icon to its right.
- Buttons:** New, Import, Change Owner, Search this list...
- Bottom Bar:** Windows Start button, Taskbar with icons for File Explorer, Edge, File Manager, Mail, Photos, Task View, Google Chrome, Microsoft Word, Microsoft Excel, Weather (27°C Mostly clear), Network, Battery, ENG, Date (28-10-2023), and Time (10:36).

TASK 3

USERS AND DATA SECURITY

USERS

CREATE USER

We have created two users, Racheal Marc (user 1) and Dave Jone (user 2). They have been created in the profile named Standard Platform User and the user license for them is Salesforce Platform.

The screenshot shows the Salesforce Setup - Users page. A new user record for 'Racheal Marc' is being created. The 'User Detail' section includes fields for Name (Racheal Marc), Alias (RMarc), Email (motu2023@gmail.com), Username (motu2023@gmail.com), Nickname (User16978116681171155351), Title, Company, Department, Division, Address, and Time Zone ((GMT+05:30) India Standard Time (Asia/Kolkata)). The 'Role' field is set to 'SVP_Human Resources'. The 'User License Profile' is 'Salesforce Platform Standard Platform User'. The 'Active' checkbox is checked. Other role checkboxes like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, and Site.com Publisher User are unselected. The status bar at the bottom right shows the date as 28-10-2023 and time as 04:26.

The screenshot shows the Salesforce Setup - Users page. A new user record for 'Dave Jone' is being created. The 'User Detail' section includes fields for Name (Dave Jone), Alias (djone), Email (harinharini6531@gmail.com), Username (dora1@gmail.com), Nickname (User1697734478006867553), Title, Company, Department, Division, Address, and Time Zone ((GMT+05:30) India Standard Time (Asia/Kolkata)). The 'Role' field is set to 'SVP_Sales & Marketing'. The 'User License Profile' is 'Salesforce Platform Standard Platform User'. The 'Active' checkbox is checked. Other role checkboxes like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, and Site.com Publisher User are unselected. The status bar at the bottom right shows the date as 28-10-2023 and time as 04:25.

TASK 4

AUTOMATION

EMAIL TEMPLATES

CREATE EMAIL TEMPLATE FOR EMERGENCY LEAVE APPROVAL

I have created an email template for emergency leave approval.

The screenshot shows the 'Email Templates' page in the Salesforce Lightning interface. The title bar says 'Email Templates | Salesforce'. The main content area displays a table with one row for the 'Emergency Leave Approved' template. The columns are: Email Template Name, Description, Email Templates from Salesforce, Last Modified By ID, and Last Modified Date. The template name is 'Emergency Leave Approved', the description is 'Your emergency leave was approved', it's from the 'Public Email Templates' folder, last modified by 'Harini S' on '28/10/2023, 3:39 pm', and there is a 'New Email Template' button in the top right corner.

The screenshot shows the details page for the 'Emergency Leave Approved' email template. The title bar says 'Emergency Leave Approved | Salesforce'. The main content area shows the template's configuration. It includes fields for Email Template Name ('Emergency Leave Approved'), Related Entity Type ('Employee'), Description ('Your emergency leave was approved'), Folder ('Public Email Templates'), and a checkbox for 'Made in Email Template Builder' which is checked. Below this is a 'Message Content' section containing the email body. The body starts with 'Subject: Your emergency leave was approved', followed by 'HTML Value: Dear {{Employee_Name_c}}', and a message body: 'I hope this email finds you well. We wanted to inform you that your emergency leave request has been approved. Please ensure that all pending tasks are delegated, and you have completed any necessary handovers before proceeding on your leave.' It also includes a note: 'During your absence, if any urgent matters arise or if there is a need for any further assistance, please contact the manager.' At the bottom, there are 'Edit', 'Clone', and 'Delete' buttons.

APPROVAL PROCESS

CREATE APPROVAL PROCESS FOR EMERGENCY LEAVE

We have created approval process for emergency leave. So that the employees for whom the emergency leave was required will give a request for leave and that will go through the approval process. Finally the leave request was approved or rejected based on the conditions we give.

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Data' and 'Process Automation', 'Approval Processes' is selected. A search bar at the top left contains 'approval'. The main content area displays the 'Leave: Emergency Leave Approval' process. The 'Process Definition Detail' section includes:

Field	Value
Process Name	Emergency Leave Approval
Unique Name	Emergency_Leave_Approval
Description	Entry Criteria: Leave: Leave Type EQUALS Emergency leave
Record Editability	Administrator ONLY
Approval Assignment Email Template	Emergency_Leave_Approved
Initial Submitters	Leave Owner
Created By	Harini S 20/10/2023, 11:49 am
Modified By	Harini S 28/10/2023, 4:58 pm

The 'Active' checkbox is checked. The 'Manager of Record Owner' field is set to 'Determined By'. Below this, there's a section for 'Initial Submission Actions' with buttons for 'Add Existing' and 'Add New'.

The screenshot continues from the previous one, showing the 'Approval Steps' section of the 'Leave: Emergency Leave Approval' process. It lists a single step:

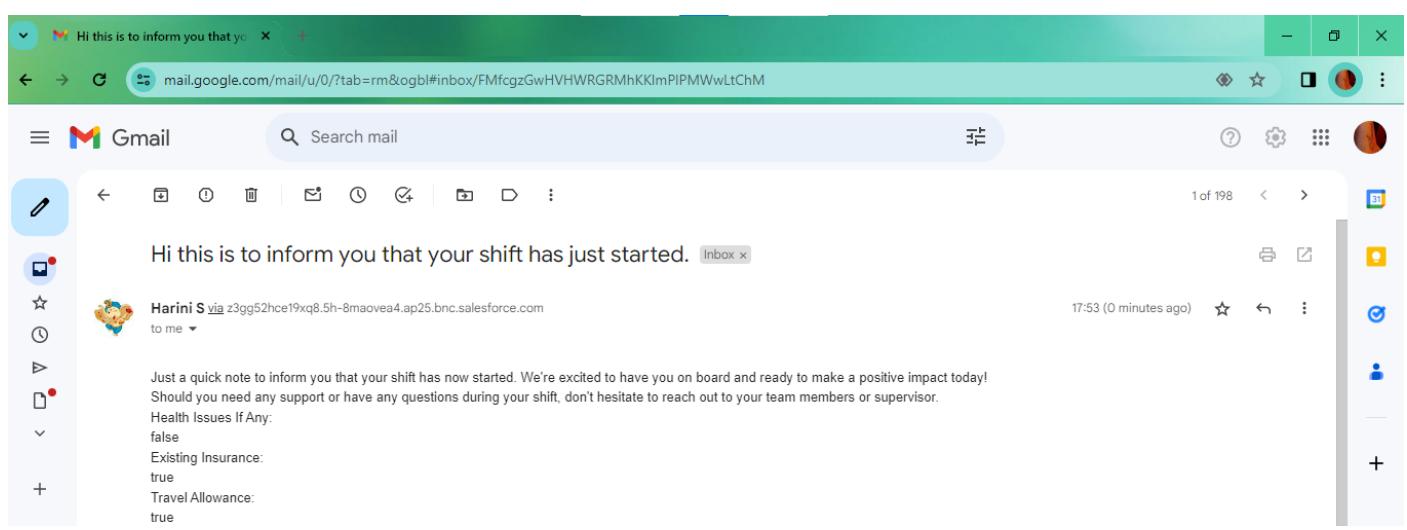
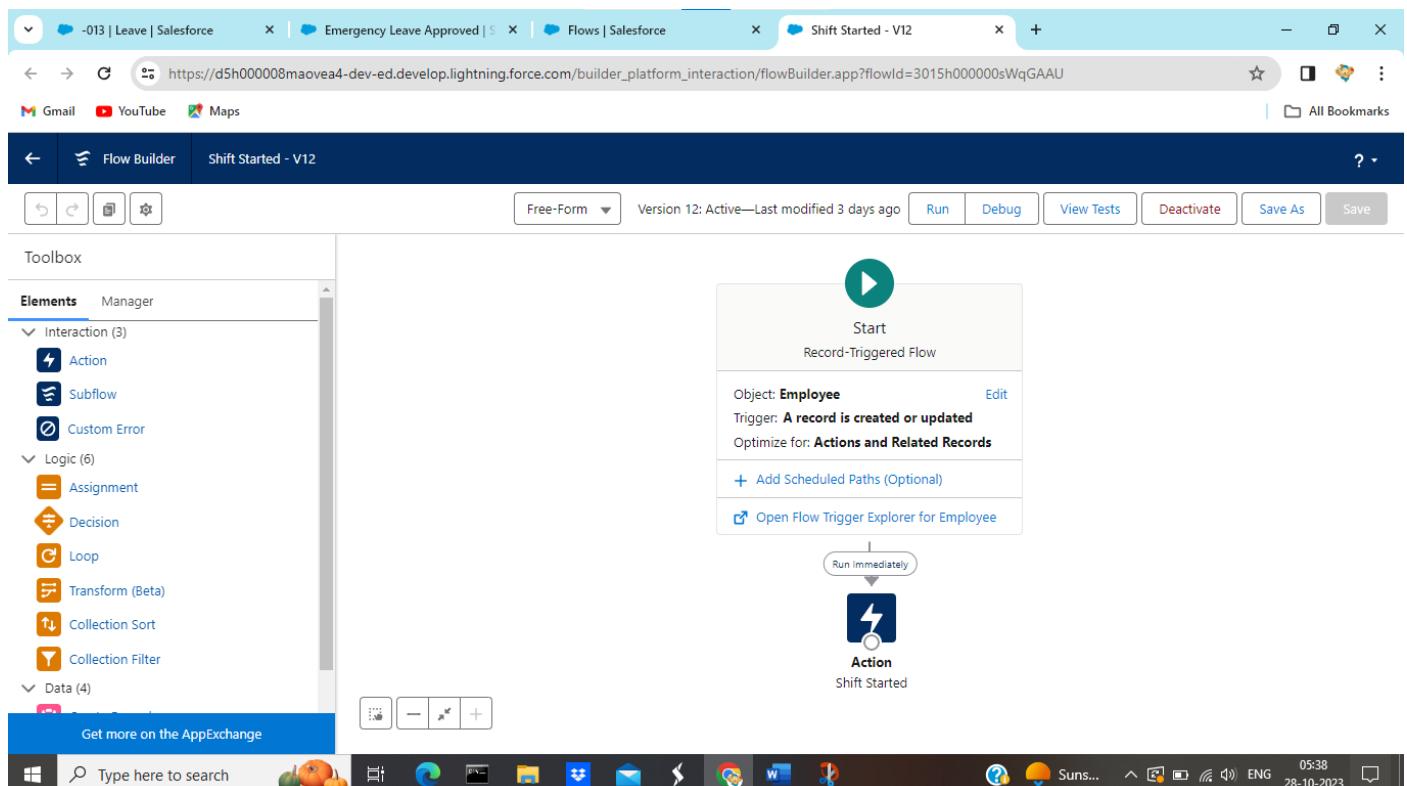
Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Approver1			User: Harini S	Final Rejection

Below this are sections for 'Final Approval Actions', 'Final Rejection Actions', and 'Recall Actions', each with their respective configuration options.

FLOW

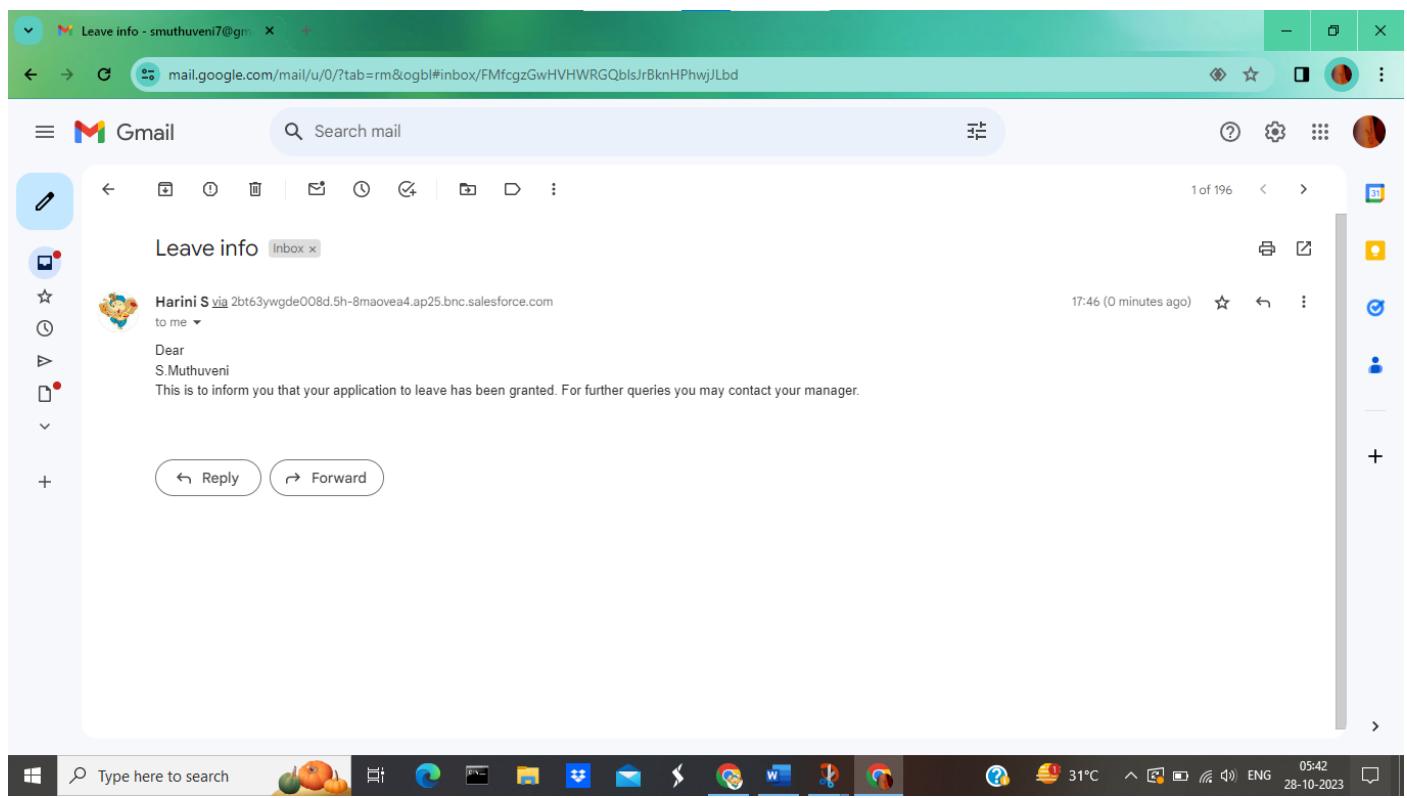
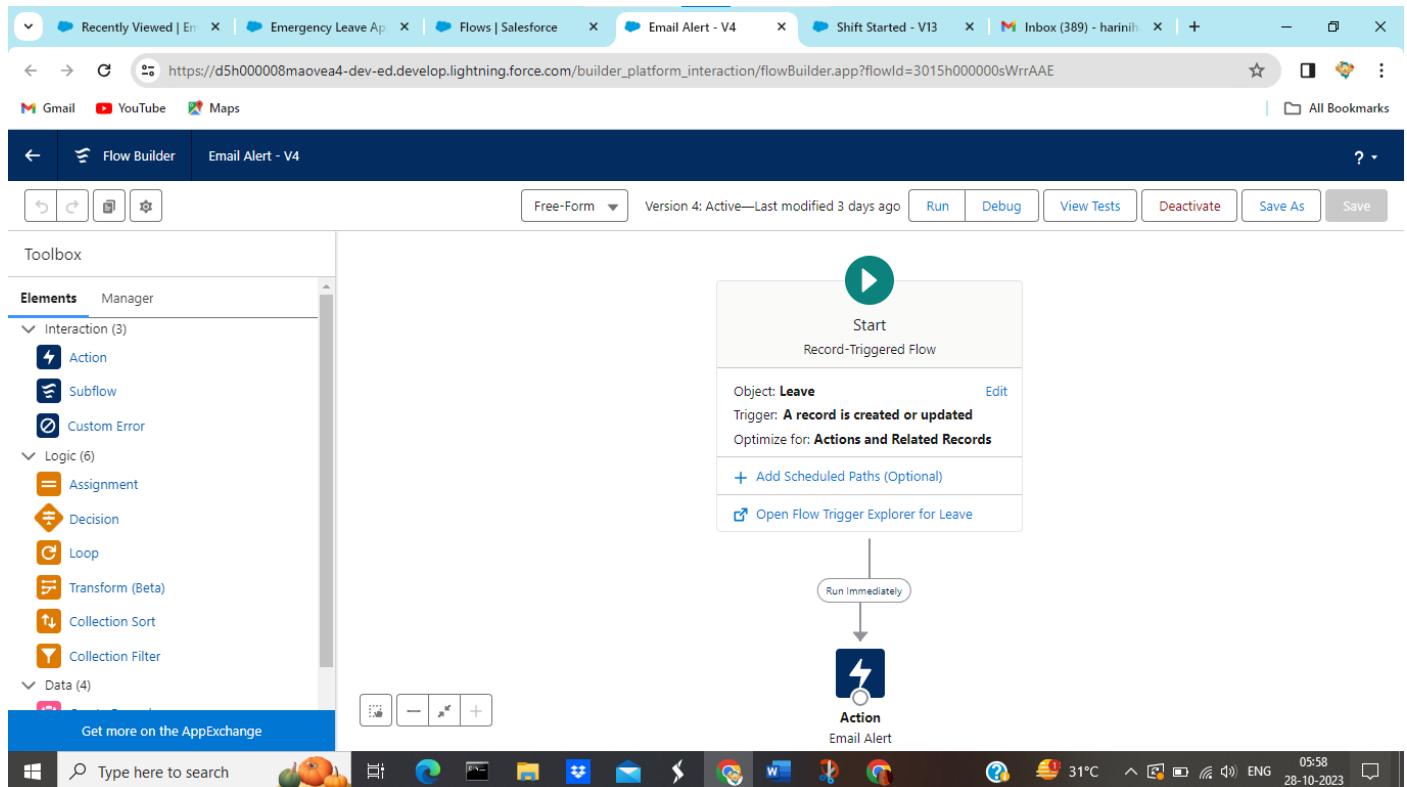
CREATE FLOW FOR SHIFT TO START

We have created a flow for the shift to be started. When we create a record in the Employee object with certain information of shift timings, then an email is sent to the particular employee regarding the shift information whenever that record is created or updated.



CREATE FLOW FOR EMAIL ALERT

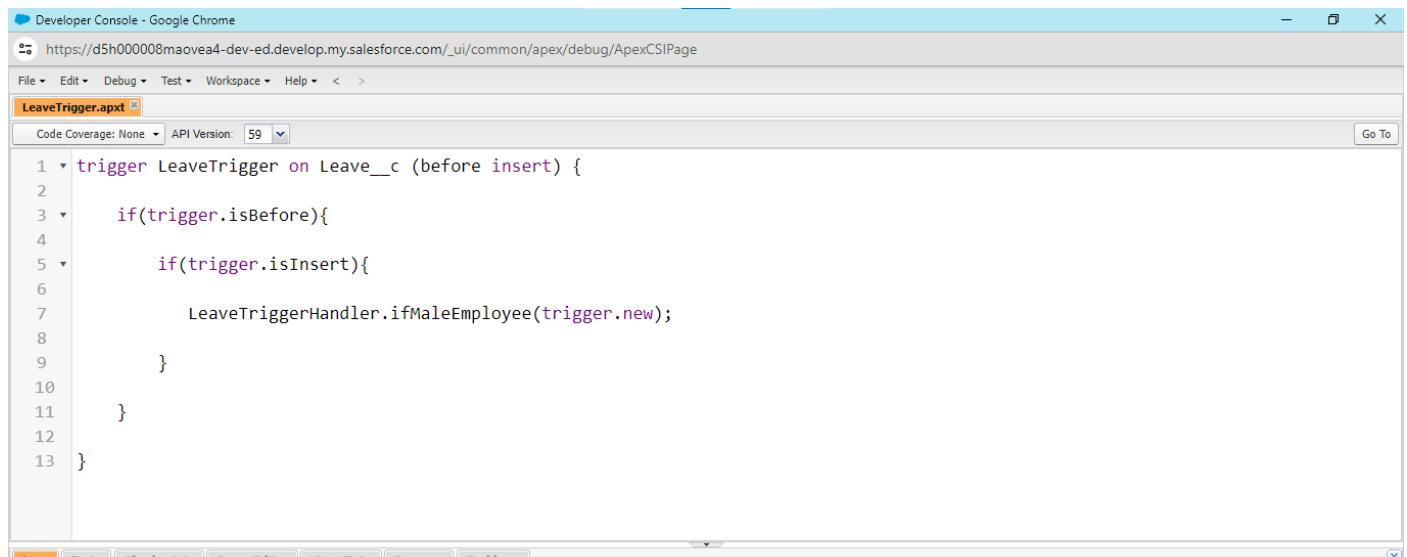
We have also created a flow for email alert. Whenever a leave was created for an employee and was approved by the approver, an email is sent to that particular employee regarding the confirmation of the leave.



APEX

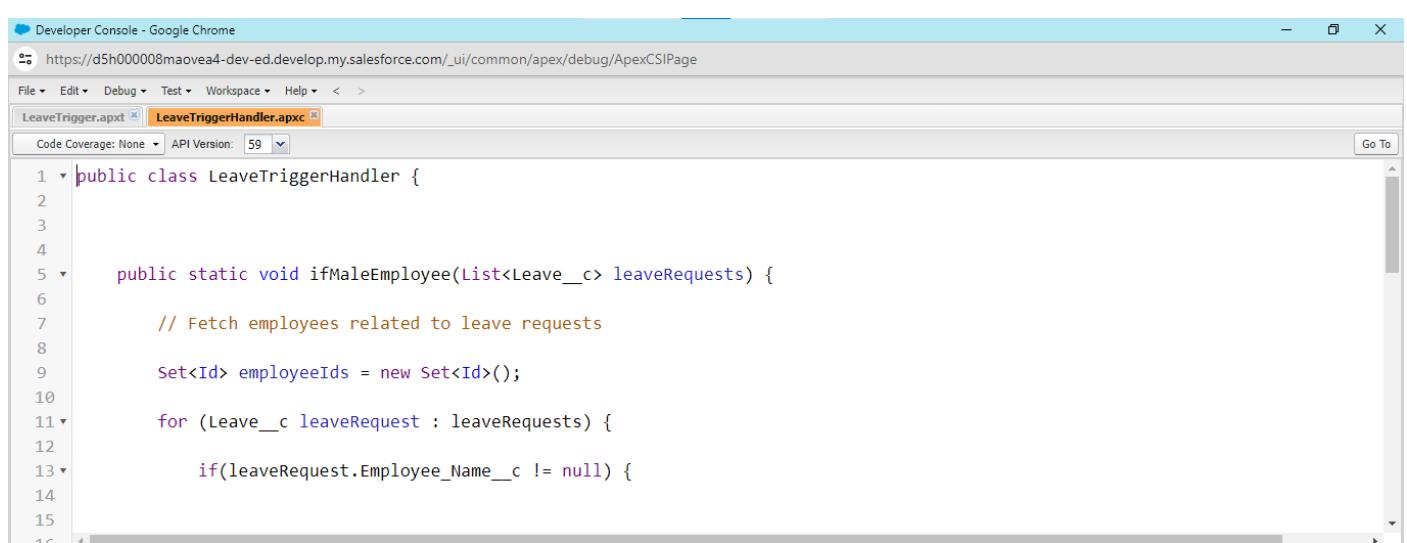
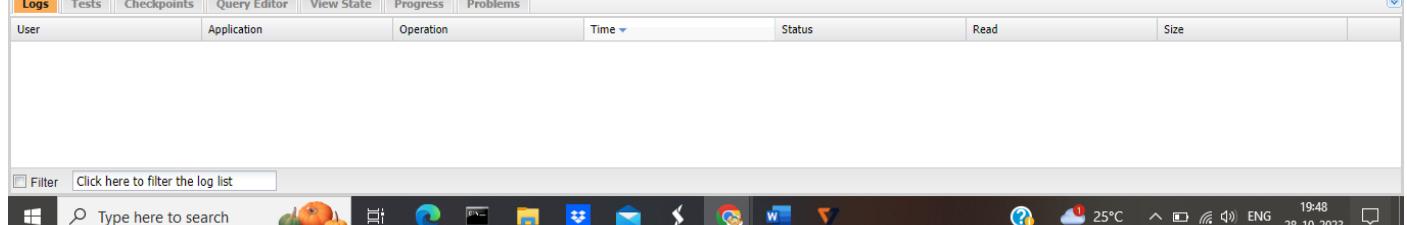
APEX OVERVIEW

leave. We have created an apex trigger named LeaveTrigger. We have also created an apex class named LeaveTriggerHandler. It will triggers on every time before inserting a record on leave object and the selected employee is male. It checks the condition that Male employee is not allowed to take any maternity leave.



The screenshot shows the Salesforce Developer Console interface. The top bar displays the URL https://d5h000008maovea4-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The tabs at the top are "LeaveTrigger.apx" and "LeaveTriggerHandler.apx". The main area contains the Apex trigger code:

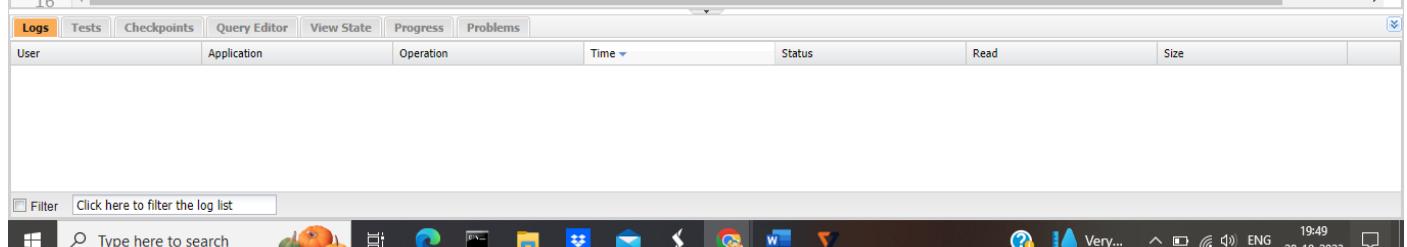
```
trigger LeaveTrigger on Leave__c (before insert) {
    if(trigger.isBefore){
        if(trigger.isInsert){
            LeaveTriggerHandler.ifMaleEmployee(trigger.new);
        }
    }
}
```



The screenshot shows the Salesforce Developer Console interface. The top bar displays the URL https://d5h000008maovea4-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The tabs at the top are "LeaveTrigger.apx" and "LeaveTriggerHandler.apx". The main area contains the Apex class code:

```
public class LeaveTriggerHandler {
    public static void ifMaleEmployee(List<Leave__c> leaveRequests) {
        // Fetch employees related to leave requests
        Set<Id> employeeIds = new Set<Id>();
        for (Leave__c leaveRequest : leaveRequests) {
            if(leaveRequest.Employee_Name__c != null) {

```



Developer Console - Google Chrome
https://d5h000008maovea4-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

LeaveTrigger.apxt LeaveTriggerHandler.apxc

Code Coverage: None API Version: 59 Go To

```
12     if(leaveRequest.Employee__c != null) {
13
14         employeeIds.add(leaveRequest.Employee__c);
15
16     }
17
18 }
19
20
21
22
23
24
25 // Fetch employee records
26
27 Map<Id, Employee__c> employeesMap = new Map<Id, Employee__c>([SELECT Id, Gender__c FROM Employee__c WHERE Id IN :employeeIds]);
28
29
30
31 // Check eligibility for maternity leave and gender
32
33 for (Leave__c leaveRequest : leaveRequests) {
34 }
```

Logs, Tests, and Problems

Developer Console - Google Chrome
https://d5h000008maovea4-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

LeaveTrigger.apxt LeaveTriggerHandler.apxc

Code Coverage: None API Version: 59 Go To

```
32
33 for (Leave__c leaveRequest : leaveRequests) {
34
35     if (leaveRequest.Leave_Type__c == 'Maternity Leave') {
36
37         Employee__c emp = employeesMap.get(leaveRequest.Employee__c);
38
39         if (emp != null && emp.Gender__c != null && emp.Gender__c == 'Male') {
40
41             leaveRequestaddError('Male employees are not eligible for Maternity Leave');
42
43         }
44
45     }
46
47 }
48
49
50 }
51
52
53 }
```

Logs, Tests, and Problems

If any male employee chosen maternity leave, then an error message is arised indicating that 'Male employees are not eligible for Maternity Leave'. This is how the trigger works .

The screenshot shows a Salesforce Lightning page for creating a new leave record. The page has a header with tabs like 'Employee Mapp' and 'Employee'. A sidebar on the left lists 'Leaves Recently Viewed' with 11 items updated a few seconds ago. The main form is titled 'Leave' and includes fields for 'Employee name' (A.Sam), 'Leave Type' (Maternity leave), 'Leave Status' (Not on leave), 'Start Date' (17/10/2023), and 'End Date' (18/10/2023). An 'Owner' field is set to Harini S. A modal window titled 'We hit a snag.' displays an error message: 'Review the errors on this page.' followed by a bullet point: 'Male employees are not eligible for Maternity Leave.' Below the message are three buttons: 'Cancel', 'Save & New', and 'Save'. The status bar at the bottom shows system information including the date (28-10-2023) and time (19:56).

TASK 5

REPORTS AND DASHBOARDS

REPORTS

CREATE REPORT

We added Reports tab to the EMPLOYEE MAPP app and also we created various reports.

The screenshot shows the Employee MAPP application interface. At the top, there are three tabs: 'Reports | Salesforce', 'Flows | Salesforce', and 'Inbox (399) - hariniharini6531'. Below the tabs, the URL is https://d5h000008maovea4-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru. The main content area is titled 'Reports' and shows a list of recent reports. The list includes:

Report Name	Description	Folder	Created By	Created On	Subscribed
Employee leave details		My Reports	Harini S	25/10/2023, 4:03 pm	
Employees and Health Insurances		My Reports	Harini S	25/10/2023, 3:59 pm	
Travel Allowance Report		My Reports	Harini S	25/10/2023, 3:28 pm	

The left sidebar has categories: Recent, Created by Me, Private Reports, Public Reports, All Reports, Folders, All Folders, Created by Me, Shared with Me, and Favorites. The bottom navigation bar includes icons for search, file operations, and system status.

Travel Allowance Report

The screenshot shows the 'Travel Allowance Report' page. The title is 'Report: Employees with Organizations with Travel Allowance' and the subtitle is 'Travel Allowance Report'. It displays a table with the following data:

Total Records	Total Distance
12	34,026.76

The table is organized by Organization and shows the sum of distance record count for each organization. The data is as follows:

Organization	Travel Allowance	Total
Accenture	Sum of Distance Record Count	14,993.02
Apple	Sum of Distance Record Count	4,680.68
HP	Sum of Distance Record Count	4,201.62
Intel	Sum of Distance Record Count	1,852.58
Oracle	Sum of Distance Record Count	5,783.13
Wipro	Sum of Distance Record Count	2,515.73
Total	Sum of Distance Record Count	34,026.76

At the bottom, there are checkboxes for 'Row Counts', 'Detail Rows', 'Grand Total', and 'Stacked Summaries'. The bottom navigation bar includes icons for search, file operations, and system status.

EMPLOYEES AND HEALTH INSURANCES:

The screenshot shows a Salesforce report titled "Report: Organizations with Employees and Health Insurances" with the specific name "Employees and Health Insurances". The report displays data in a grid format. The columns include Age, Organization, Organization, Accenture, Apple, HP, Intel, Oracle, Wipro, and Total. The rows show various record counts for different age groups (e.g., 26.47, 24.06, 23.27, etc.) across organizations like Accenture, Apple, HP, Intel, Oracle, and Wipro. The total count for each row is also provided.

Age	Organization	Accenture	Apple	HP	Intel	Oracle	Wipro	Total
26.47	Record Count	0	1	0	0	0	0	1
24.06	Record Count	0	0	1	0	0	0	1
23.27	Record Count	0	0	0	1	0	1	2
21.64	Record Count	0	0	0	0	1	0	1
21.13	Record Count	0	0	0	0	1	0	1
21.09	Record Count	1	0	0	0	0	0	1
20.74	Record Count	1	0	0	0	0	0	1
20.68	Record Count	0	1	0	0	0	0	1
20.56	Record Count	1	0	0	1	0	0	2
20.09	Record Count	1	0	0	0	0	0	1

Employee Leave Details:

The screenshot shows a Salesforce report titled "Report: Leaves with Employee name" with the specific name "Employee leave details". The report displays data in a grid format. The columns include Employee name, Duration, and Total. The rows show various record counts for employees like A.Sam, D.Umesh, G.Sabi, J.Jasmine, S.Akshu, S.Harini, S.Jose, and S.Kesav. The total count for each row is also provided.

Employee name	Duration	Total
A.Sam	-8.00	1
D.Umesh	-1.00	1
G.Sabi	-1.00	1
J.Jasmine	-1.00	1
S.Akshu	-1.00	2
S.Harini	-1.00	1
S.Jose	-0.00	1
S.Kesav	-2.00	2
Total		10

DASHBOARDS

We added the Dashboards tab and we have created dashboards for the reports created. Dashboards should not be creatable for the tabular report.

The screenshot shows the Salesforce Dashboards page. At the top, there are three tabs: 'Dashboards | Salesforce', 'Flows | Salesforce', and 'Shift Started - V14'. Below the tabs is a search bar and a 'Dashboard' button. The main area displays a table of recent dashboards:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Employee Details	Employee data in dashboard	My Dashboards	Harini S	25/10/2023, 4:24 pm	

On the left sidebar, there are links for 'Created by Me', 'Private Dashboards', 'All Dashboards', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', 'Favorites', and 'All Favorites'. The bottom of the screen shows a Windows taskbar with various icons and system status.

The screenshot shows the 'Employee Details' dashboard. At the top, there are three tabs: 'Employee Details | Salesforce', 'Flows | Salesforce', and 'Shift Started - V14'. Below the tabs is a search bar and a 'Dashboard' button. The main area contains three reports:

- Travel Allowance Report**: A horizontal bar chart showing the sum of distance for different organizations. The data is as follows:

Organization	Sum of Distance
Accenture	15k
Apple	4.7k
HP	4.2k
Intel	1.9k
Oracle	5.8k
Wipro	2.5k
- Employees and Health Insurances**: A line chart showing record count versus age. The data points are approximately:

Age	Record Count
20.09	1
20.56	2
20.68	1
20.74	1
21.09	1
21.13	1
21.64	1
23.27	2
24.06	1
26.47	1
- Employee leave details**: A bar chart showing record count versus duration. The data points are:

Duration	Record Count
-8.00	2
-1.00	7

At the bottom of each report section, there is a 'View Report' link. The bottom of the screen shows a Windows taskbar with various icons and system status.

TASK 6

PROJECT REPORT/DEMONSTRATION

PROJECT VIDEO LINK: <https://youtu.be/vzfxhsyqJBI>