

# Employee Onboarding Platform



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## 📁 Phase 1: Problem Understanding & Industry Analysis

### Goals:

- Understand current onboarding challenges in organizations
  - Analyze industry best practices and competitor solutions
  - Document project scope, goals, and success metrics
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### — Research Onboarding Challenges

- Identify common issues employees face during onboarding
  - Collect information on delayed access, incomplete documentation, poor communication, and training gaps
- 

### — Analyze Industry Best Practices

- Study onboarding practices of leading companies
  - Note strategies like automated task tracking, role-based access, mentorship programs, and digital document handling
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## **— Competitor Solutions**

- Review competitor tools for onboarding management
  - Compare features, usability, and workflow efficiency
  - Identify gaps or opportunities for improvement
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## **— Define Project Scope**

- Clearly outline the project goals:
    - Streamline onboarding tasks
    - Centralize employee data, documents, and task tracking
    - Enable role-based access for HR, Manager, and Employee
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## **— Define Success Metrics**

- Time to complete onboarding
  - Employee satisfaction with onboarding process
  - Accuracy and completeness of onboarding documentation
  - System usability and role-based access efficiency
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## Deliverables

- Research notes on onboarding challenges
  - Industry best practices summary
  - Competitor analysis table
  - Documented project scope, goals, and success metrics
-

# Phase 2: Org Setup & Configuration

## Goals:

- Create Salesforce Developer Org
- Configure company info, users, and profiles
- Set up permission sets for HR, Manager, Employee

## Developer Org Setup

1. Signup: [Salesforce Developer Signup](#)
  - Username: `manas@onboarding.com`
  - Company: `Onboarding Capstone`
  - Job Role: `Developer`
2. Setup → Company Information:
  - Fiscal Year = Standard, Locale = English (India), Time Zone = GMT+5:30

## Create Custom Profiles

- Clone *Standard User* → create:
  - `HR_Profile`, `Manager_Profile`, `Employee_Profile`
- Object Permissions (Employee, OnboardingTask, Document):
  - HR → CRUD, Manager → Read/Edit, Employee → Read/Edit (own)

- Tab Visibility: Default On

The screenshot shows the Salesforce Setup interface under the 'Profiles' section. A search bar at the top has 'Profile' typed into it. Below the search bar, there's a message: 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Employee\_Profile' and contains sections for 'Profile Detail' and 'Page Layouts'. In 'Profile Detail', the name is 'Employee\_Profile', user license is 'Salesforce', description is 'Profile for employees - view own onboarding status, upload documents', and created by 'Manas.Raghuvanshi' on 9/15/2025, 6:34 AM. Modified by 'Manas.Raghuvanshi' on 9/20/2025, 3:25 AM. Under 'Page Layouts', various standard object layouts like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, and Asset are listed. To the right, 'Location Group Assignment' includes entries for Macro, Object Milestone, Operating Hours, Opportunity, and Order.

Kjhk

## Create Users Screenshot: Users list showing all 3 users

Name	Profile	Username
Hira Singh	HR_Profile	hira@onboarding.com
Mohan Verma	Manager_Profile	mohan@onboarding.com
Asha Kumar	Employee_Profile	asha@onboarding.com

The screenshot shows the Salesforce Setup interface under the 'Users' section. The title 'All Users' is at the top. Below it, a message says 'On this page you can create, view, and manage users.' and 'To get more licenses, use the Your Account app. [Let's Go](#)'. There are buttons for 'View: All Users', 'Edit', 'Create New View', 'New User', 'Reset Password(s)', and 'Add Multiple Users'. The main area is a table with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists six users: Chatter Expert (Chatter), EPIC\_OrgFarm (OEPIC), Kumar\_Asha (akuma), Raghuvanshi\_Manas (man), Singh\_Hira (hira), User\_Integration (integ), User\_Security (sec), and Verma\_Mohan (mohan). The 'Active' column shows checkboxes, and the 'Profile' column lists their respective profiles: Chatter Free User, System Administrator, Chatter Free User, System Administrator, HR\_Profile, Analytics Cloud Integration User, Analytics Cloud Security User, and Manager\_Profile.

## Create Permission Sets

- Permission Sets: HR\_Full\_Access, Manager\_Approvals, Employee\_SelfService
- Configure Object Settings (CRUD) and assign to users

## Sharing & Security

- Sharing Settings → Org-Wide Defaults → Private for Employee, Task, Document

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. It displays four sections of sharing rules:

- Work Type Sharing Rules:** No sharing rules specified.
- Work Type Group Sharing Rules:** No sharing rules specified.
- Document Sharing Rules:** A table showing sharing rules for documents. One rule is listed:

Action	Criteria	Shared With	Access Level
Edit   Del	Document: Owner NOT EQUAL TO	Group: Manager Group	ReadWrite
Edit   Del	Owner in Group: HR Group	Group: HR Group	ReadWrite
- Employee Sharing Rules:** A table showing sharing rules for employees. Two rules are listed:

Action	Criteria	Shared With	Access Level
Edit   Del	Employee: Manager NOT EQUAL TO	Group: Manager Group	ReadWrite
Edit   Del	Owner in All Internal Users	Group: HR Group	ReadWrite
Edit   Del	Owner in Group: HR Group	Group: HR Group	ReadWrite
- Onboarding Task Sharing Rules:** A table showing sharing rules for onboarding tasks. One rule is listed:

Action	Criteria	Shared With	Access Level
Edit   Del	Onboarding Task: Owner NOT EQUAL TO	Group: Manager Group	ReadWrite
Edit   Del	Owner in Group: HR Group	Group: HR Group	ReadWrite

## Verify Access

- Login as each user:
  - HR → create records
  - Manager → approve/view team

- Employee → view own tasks

The screenshot shows a CRM application interface. At the top, there is a navigation bar with a cloud icon, the word "Sales", and various menu items: Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Employees (which is currently selected), More, and a search bar. Below the navigation bar, the main content area displays an employee profile for "Test EmployeeHR". The profile includes fields for Employee Name (Test EmployeeHR), Owner (Hira Singh), Has Manager (Mohan Verma), and Created By (Hira Singh, 21/09/2025, 10:19 am). On the right side, there is an "Activity" section with a header "Activity" and a sub-section "Upcoming & Overdue". It shows a message: "No activities to show. Get started by sending an email, scheduling a task, and more." Below this, another message states: "No past activity. Past meetings and tasks marked as done show up here." At the bottom left, there is a "To Do List" button.

# Phase 3 — Data Modeling & Relationships Documentation

## Header / Intro

Objective:

Design custom objects, fields, and relationships to manage employee onboarding tasks and documents.

Goals:

- Create Employee\_\_c, OnboardingTask\_\_c, and Document\_\_c objects
- Define fields for each object
- Establish Master-Detail and Lookup relationships
- Visualize the data model using Schema Builder

## Objects & Fields

### 2a — Employee\_\_c

Field Label	Field Name	Data Type	Required	Description
Employee Name	Employee_Name__c	Text (255)	<input checked="" type="checkbox"/> Yes	Full name of employee

Email	Email__c	Email	<input checked="" type="checkbox"/> Yes	Employee email address
Department	Department__c	Picklist	<input type="checkbox"/> No	Department name (HR, IT, etc.)
Manager	Manager__c	Lookup (User)	<input type="checkbox"/> No	Manager assigned to employee
Joining Date	Joining_Date__c	Date	<input type="checkbox"/> No	Employee joining date

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## 2b — OnboardingTask\_\_c

Field Label	Field Name	Data Type	Required	Description
Task Name	Task_Name__c	Text (255)	<input checked="" type="checkbox"/> Yes	Name of the onboarding task
Assigned Employee	Assigned_Employee__c	Master-Detail (Employee__c)	<input checked="" type="checkbox"/> Yes	Task linked to an employee
Assigned Manager	Assigned_Manager__c	Lookup (User)	<input type="checkbox"/> No	Manager responsible for the task

Status	Status__c	Picklist (Not Started, In Progress, Completed)	<input checked="" type="checkbox"/> Yes	Task progress status
Due Date	Due_Date__c	Date	<input type="checkbox"/> No	Task deadline

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## 2c — Document\_\_c

Field Label	Field Name	Data Type	Required	Description
Document Name	Document_Name__c	Text (255)	<input checked="" type="checkbox"/> Yes	Name of the uploaded document
Uploaded By	Uploaded_By__c	Lookup (User)	<input type="checkbox"/> No	User who uploaded the document
Related Employee	Employee__c	Master-Detail (Employee__c)	<input checked="" type="checkbox"/> Yes	Document linked to employee
Related Task	Task__c	Lookup (OnboardingTask__c)	<input type="checkbox"/> No	Document linked to a task (optional)

Status	Status__c	Picklist (Pending, Approved, Rejected)	<input checked="" type="checkbox"/> Yes	Document approval status
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SETUP > OBJECT MANAGER Onboarding Task					
Details	Fields & Relationships				
Fields & Relationships	<b>Fields &amp; Relationships</b> 9 Items, Sorted by Field Label				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Assigned Employee	Assigned_Employee__c	Lookup(Employee)		✓
Lightning Record Pages	Assigned Manager	Assigned_Manager__c	Lookup(User)		✓
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)		
Compact Layouts	Due Date	Due_Date__c	Date		
Field Sets	Employee	Employee__c	Lookup(Employee)		✓
Object Limits	Last Modified By	LastModifiedById	Lookup(User)		
Record Types	Owner	OwnerId	Lookup(User,Group)		✓
Related Lookup Filters	Status	Status__c	Picklist		
Restriction Rules	Task Name	Name	Text(80)		✓
Scoping Rules					
Object Access					
Triggers					
Flow Triggers					

SETUP > OBJECT MANAGER Onboarding Task					
Details	Fields & Relationships				
Fields & Relationships	<b>Fields &amp; Relationships</b> 9 Items, Sorted by Field Label				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	Department	Department__c	Picklist		
Buttons, Links, and Actions	Email	Email__c	Email		
Compact Layouts	Employee Name	Name	Text(80)		✓
Field Sets	Has Manager	Has_Manager__c	Checkbox		
Object Limits	Joining Date	Joining_Date__c	Date		
Record Types	Last Modified By	LastModifiedById	Lookup(User)		
Related Lookup Filters	Manager	Manager__c	Lookup(User)		✓
Restriction Rules	Owner	OwnerId	Lookup(User,Group)		✓
Scoping Rules					
Object Access					
Triggers					
Flow Triggers					

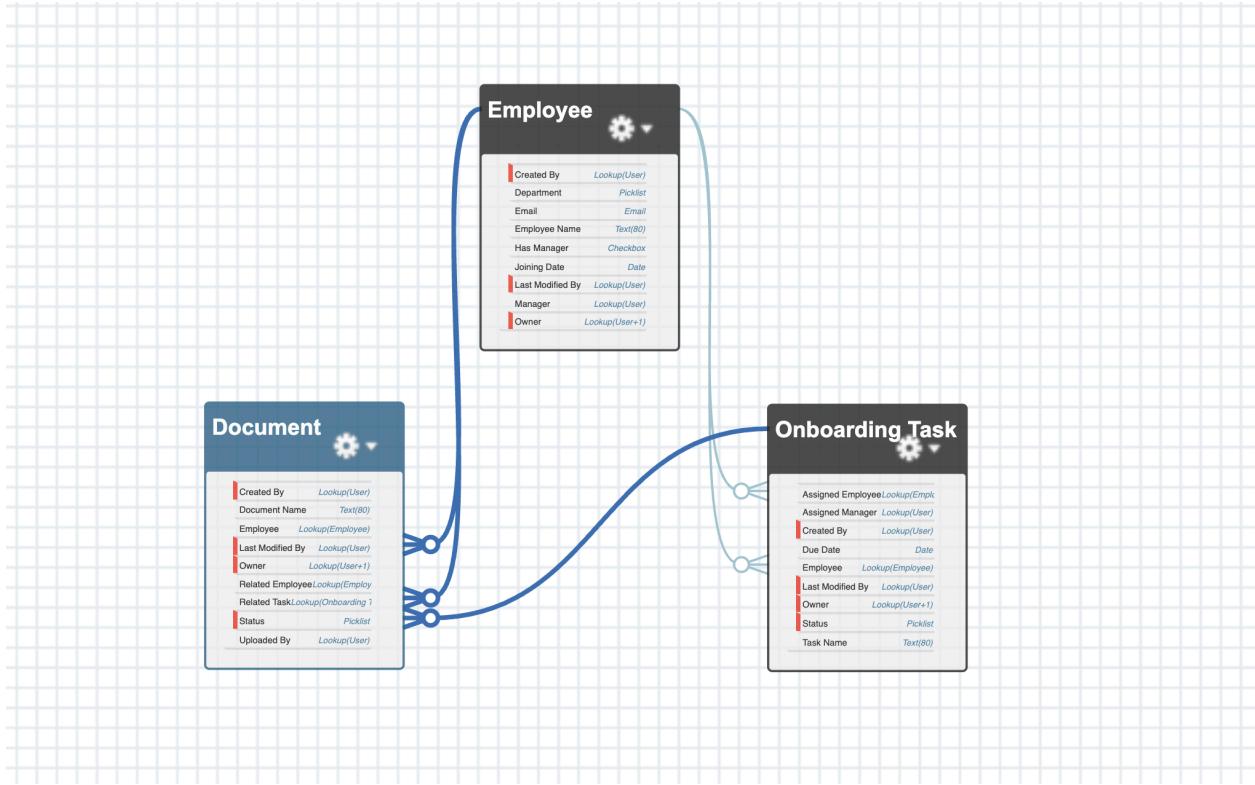
SETUP > OBJECT MANAGER

## Document

Details	Fields & Relationships				
Fields & Relationships	9 items, Sorted by Field Label				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	Document Name	Name	Text(80)	✓	▼
Buttons, Links, and Actions	Employee	Employee__c	Lookup(Employee)	✓	▼
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Field Sets	Owner	OwnerId	Lookup(User,Group)	✓	
Object Limits	Related Employee	Related_Employee__c	Lookup(Employee)	✓	▼
Record Types	Related Task	Related_Task__c	Lookup(Onboarding Task)	✓	▼
Related Lookup Filters	Status	Status__c	Picklist		▼
Restriction Rules	Uploaded By	Uploaded_By__c	Lookup(User)	✓	▼
Scoping Rules					
Object Access					
Triggers					
Flow Triggers					

## Relationships Overview

Relationship	Type	Related List Label
Employee → Manager	Lookup (User)	Employees
OnboardingTask → Employee	Master-Detail (Employee__c)	Tasks
Document → Employee	Master-Detail (Employee__c)	Documents
Document → OnboardingTask	Lookup (OnboardingTask__c)	Documents



# Phase 4 — Automation & Workflows

## Plan Automation

- Trigger: New Employee record creation.
  - Actions:
    - Create default Onboarding Tasks for each new Employee.
    - Send email notifications to Employee and Manager.
    - (Optional) Start approval process for onboarding documents.
  - Conditions: Can be department-specific or role-specific.
- 

## Create Default Onboarding Tasks with Flow

1. Navigate to: Setup → Flows → New Flow
2. Select: Record-Triggered Flow → Create.
3. Configure Trigger:
  - Object: `Employee__c`
  - Trigger: When a record is created
  - Entry Conditions: Optional (e.g., Department = HR)
4. Add Element: Create Records

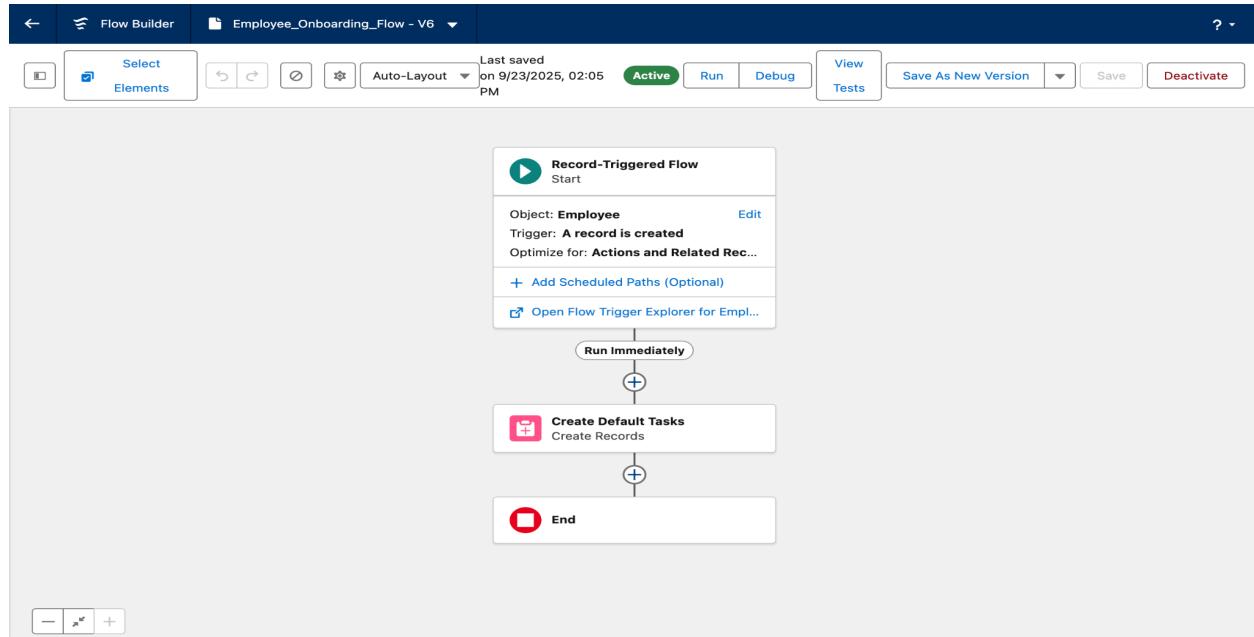
- Label: *Create Default Tasks*
- Object: **OnboardingTask\_\_c**
- Field Mapping:

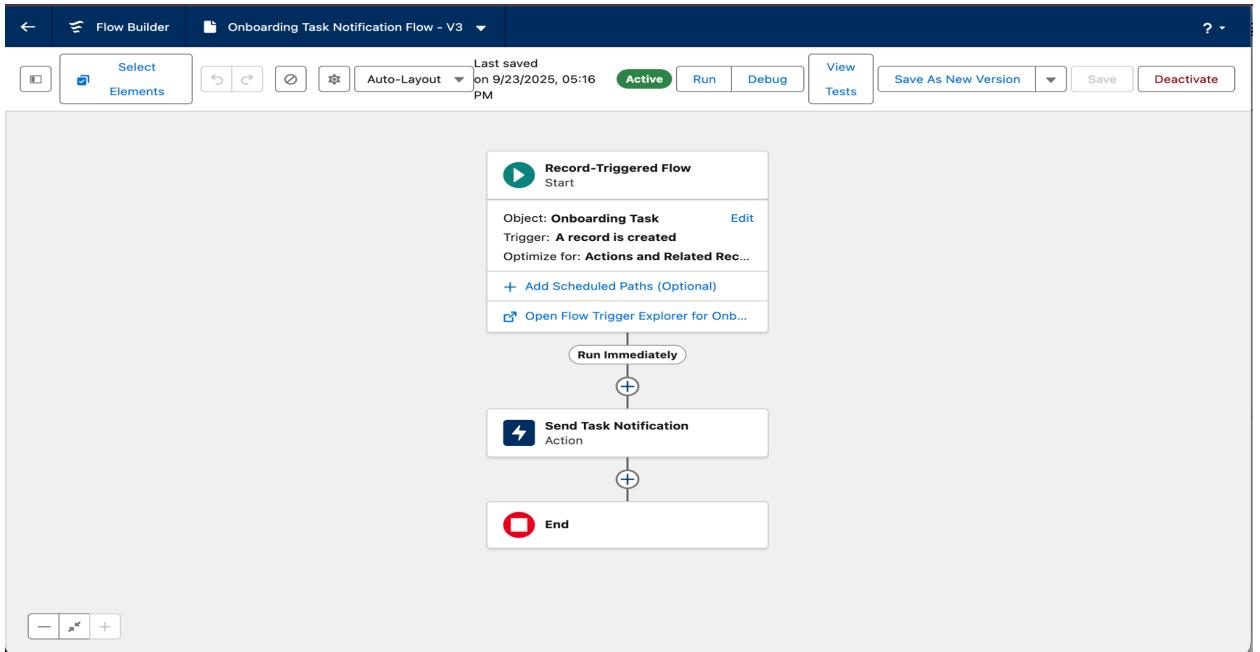
5.

Field	Value
Task Name	e.g., “Complete ID Form”
Assigned Employee	<b>\$Record.Id</b>
Status	Not Started
Due Date	<b>Today() + 7</b>

6.

7. Save and Activate the Flow.





## Test Automation

- Create a new Employee record.
- Check the Onboarding Tasks related list: Default tasks should be created automatically.
- Verify email notifications are received by Employee and Manager.

Navigate: Setup → Approval Process Document Approval Processes → Document\_\_c → New Approval Process.

1. Use Standard Wizard.
2. Configure:

- Entry Criteria: Status\_\_c = Pending
  - Approver: Employee's Manager (Manager\_\_c)
  - Approval Action: Set Status\_\_c = Approved
  - Rejection Action: Set Status\_\_c = Rejected
- 

## Verify Setup

- Create a new **Employee** record and confirm:
  - Default Onboarding Tasks are created.
  - Emails are triggered.
  - Document approval process works (if enabled).
- Ensure related lists show proper records.

The screenshot shows the Salesforce interface for the Employee object. The top navigation bar includes 'New Contact', 'Edit', 'New Opportunity', and a dropdown menu. The main area displays the 'Test 1' record with the 'Details' tab selected. Fields shown include Employee Name (Test 1), Has Manager (unchecked), Manager (Hira Singh), Email (manasr95@gmail.com), Department (Marketing), and Joining Date (9/30/2025). The 'Last Modified By' field shows Manas Raghuvanshi on 9/23/2025 at 4:47 AM. The 'Activity' sidebar is open, showing filters for 'All time - All activities - All types', a 'Refresh' button, and a message stating 'No activities to show. Get started by sending an email, scheduling a task, and more.' Below this, it says 'No past activity. Past meetings and tasks marked as done show up here.'

<input type="checkbox"/> ★ Manas Raghuvanshi	New Onboarding Task Assigned - <p>&lt;div style="font-family: Arial, sans-serif; line...	6:16 PM
<input type="checkbox"/> ★ Manas Raghuvanshi 3	New Onboarding Task Assigned - <p>&lt;div style="font-family: Arial, sans-serif; line...	Sep 23

# Phase 5 — Apex Programming (Developer)

**Goal:** Implement complex business logic that can't be achieved with declarative tools using Apex classes, triggers, and test classes. Ensure code is well-tested ( $\geq 75\%$  coverage) and bulk-safe.

## 1. Plan the Apex work

- Identify logic that needs Apex: complex validations (file format checks), batch processes, transaction control, callouts to external systems.
- Draft method signatures and responsibilities (e.g.,  
`DocumentValidator.validateFormat(documentId),`  
`TaskAutoAssigner.assignTasksForEmployee(employeeId)`).

## 2. Set up your dev environment

- Use VS Code with Salesforce Extensions Pack (SFDX) or the Developer Console for quick edits.
- Authorize your Dev Hub / scratch org or Developer Org: `sfdx auth:web:login`.

## 3. Create Apex classes (bulk-safe)

- `DocumentValidator` (static utility)
  - Responsibility: validate file types, sizes, and required metadata.
  - Example methods: `validateContentType(Blob fileBody, String contentType)`, `validateFileSize(Integer bytes)`.
- `TaskAutoAssigner` (service class)
  - Responsibility: create `OnboardingTask__c` records for a given employee in bulk.
  - Use `@future(callout=true)` only when making callouts; prefer Queueable for asynchronous processing.
- `EmployeeHelper` (domain/service layer)
  - Centralize operations like setting default fields and orchestrating task creation.

#### 4. Create Triggers (thin triggers, logic in classes)

- Trigger EmployeeTrigger on Employee\_\_c (after insert, after update)
  - Keep trigger logic minimal; call EmployeeHelper.handleAfterInsert(Trigger.new).
- Trigger DocumentTrigger on Document\_\_c (before insert, before update)
  - Call DocumentValidator to validate files and set status fields.

```
DocumentValidatorTest.cls
salesforce-capstone onboarding-project > force-app > main > default > classes > DocumentValidatorTest.cls
2 ss DocumentValidatorTest {
3
4 t
5 void testInvalidContentTypeRejected() {
6 Create a fake document
7 cument__c doc = new Document__c
8 Name = 'InvalidFile.docx',
9 Content_Type__c = 'application/msword'
10
11 st.startTest();
12 y {
13     insert doc;
14     System.assert(false, 'Should have thrown an exception for invalid content type');
15 } catch (DmlException e) {
16     System.assert(e.getMessage().contains('Invalid content type'), 'Expected invalid content type error');
17 }
18 st.stopTest();
19
20
21
22
```

PROBLEMS 1 OUTPUT DEBUG CONSOLE TERMINAL PORTS GITLENS  
manasraghuwanshi onboarding-project \$sf apex run test --target=org MyDevOrg --code-coverage --wait 10  
DocumentValidator 63% 26,27,32,33,44,...  
DocumentTrigger 100% 6  
EmployeeTrigger 75% 6

#### 5. Write Test Classes

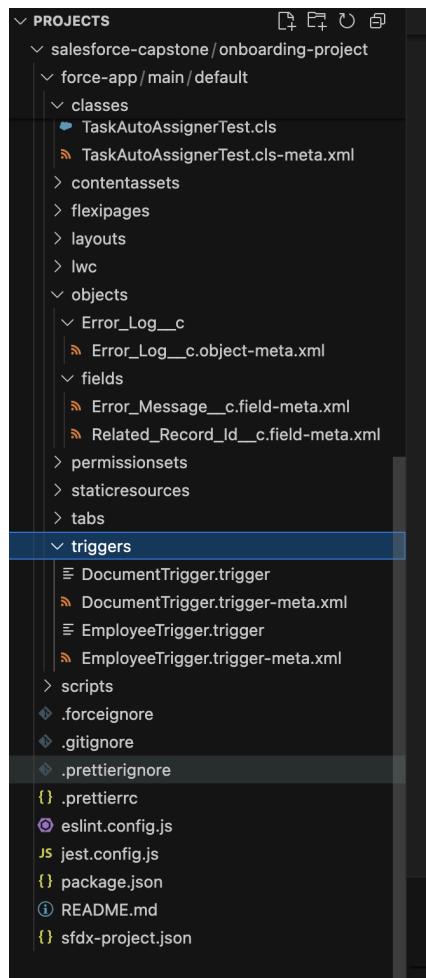
- Create comprehensive tests for each Apex class and trigger.
- Use `@IsTest` classes and `Test.startTest()` / `Test.stopTest()` blocks.
- Assert bulk behavior by inserting 200 records in a single test to ensure governor limits are respected.
- Aim for **>75% overall coverage**, but test meaningful behavior (asserts) — high coverage alone is not enough.

## 6. Run static analysis & code quality checks

- Use PMD for Apex or SonarQube if available.
- Run `sfdx force:apex:test:run` and fix failing tests.

## 7. Deploy and monitor

- Deploy to Sandbox first using change sets or SFDX. Run all tests in target org.
- Monitor logs (Debug Logs) for unexpected exceptions.



# Phase 6 — User Interface Development

**Goal:** Build polished Lightning experiences for HR, Managers, and Employees to interact with records efficiently.

## 1. Create Lightning App(s)

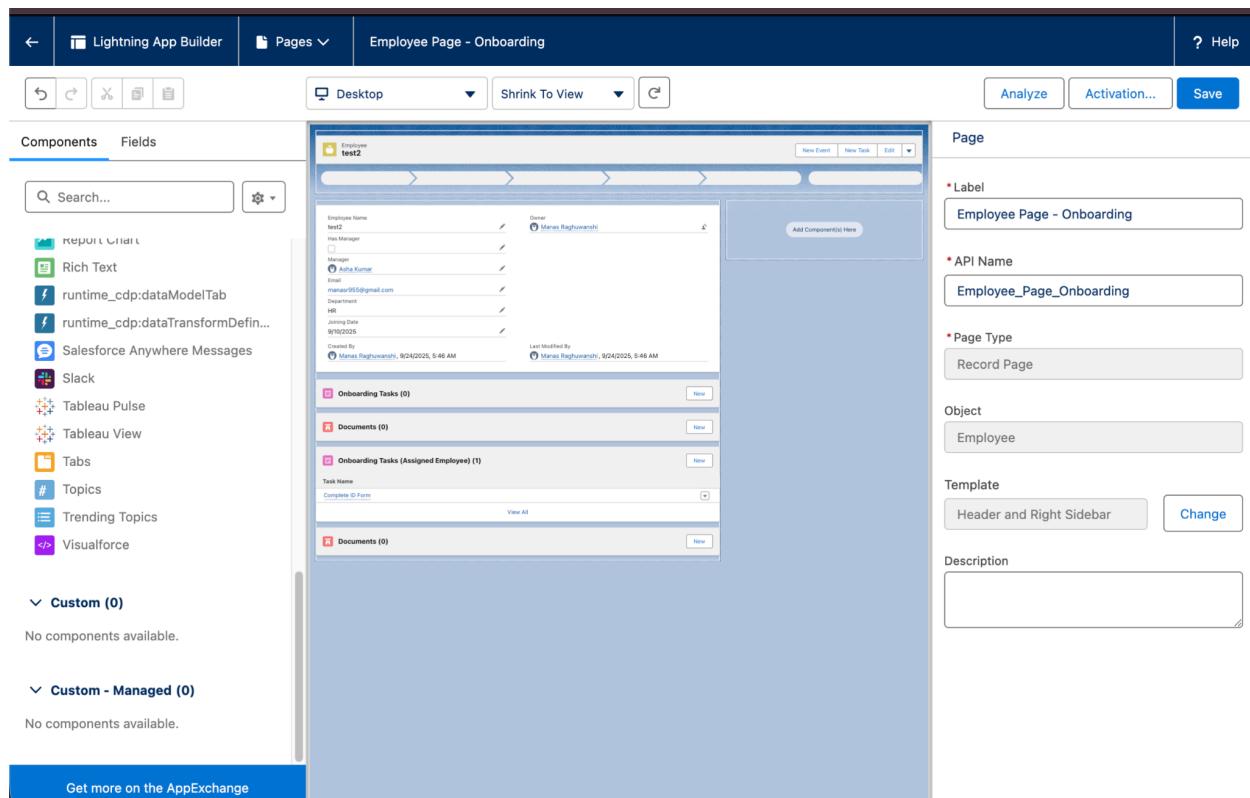
- Setup → App Manager → New Lightning App
  - App Name: **Onboarding - HR** (and **Onboarding - Manager** if needed)
  - Add Navigation Items: Employees, Onboarding Tasks, Documents, Reports
  - Set branding and permissions

The screenshot shows the Salesforce Setup page with the 'Lightning App Builder' section selected. The main area displays the 'Employee\_Page\_Onboarding' page detail. The 'Information' section shows the page name as 'Employee\_Page\_Onboarding' and a label of 'Employee Page - Onboarding'. Below this is the 'Assignments By App' section, which currently has no assignments. The 'Assignments By App, Record Type, and Profile' section lists one assignment: 'Onboard' app, 'Master' record type, 'HR\_Profile' profile, and 'Desktop and phone' form factor. The left sidebar shows the navigation tree under 'Lightning Usage' and 'User Interface'.

App	Record Type	Profile	Form Factor
Onboard	Master	HR_Profile	Desktop and phone

## 2. Customize Record Pages with Lightning App Builder

- Setup → Object Manager → Employee\_\_c → Lightning Record Pages → New
  - Start with a standard template (Header + Two Regions)
  - Add components: Record Detail, Related Lists (Tasks, Documents), Path (Status\_\_c on OnboardingTask\_\_c), Report Chart (Tasks by Status)
  - Add Quick Actions: **New Task**, **Upload Document**, **Submit for Approval**
  - Activate page for specific profiles (HR / Manager)



### 3. Add Quick Actions & Publisher Actions

- Setup → Object Manager → OnboardingTask\_\_c → Buttons, Links, and Actions  
→ New Action
  - Action Type: Create a Record / Lightning Component
  - Example quick action: **Complete Task** (updates Status\_\_c to Completed)
- Put quick actions in the record page layout / compact layout.

The screenshot shows the Salesforce Object Manager interface for the 'Onboarding Task' object. The left sidebar lists various setup categories, and the main content area displays the 'Buttons, Links, and Actions' section. The section title indicates there are 10 items, sorted by Label. A table lists the actions with columns for Label, Name, Description, Type, Content Source, and Overridden. The 'Complete Task' action is highlighted, showing it was created using the 'Action Layout Editor'.

LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Accept	Accept			Standard page	▼
Clone	Clone			Standard page	▼
Complete Task	Complete_Task	Update a Record	Action Layout Editor		▼
Complete Task Global	Complete_Task_Global	Update a Record	Action Layout Editor		▼
Delete	Delete			Standard page	▼
Edit	Edit			Standard page	▼
List	List			Standard page	▼
New	New			Standard page	▼
Onboarding Tasks Tab	Tab			Standard page	▼
View	View			Standard page	▼

# Phase 7 — Integration & External Access

**Goal:** Exchange employee and HR data with external systems (Workday, SAP), and enable secure external employee self-service via Experience Cloud (Community) or APIs.

## 1. Choose integration approach

- Real-time sync: REST / SOAP API, or Platform Events (near real-time).
- Batch sync: Scheduled jobs (Apex schedulable) + bulk API or middleware (Mulesoft, Dell Boomi).

## 2. Implement inbound integration (external → Salesforce)

- Option A: Expose REST Resource via Apex `@RestResource` and authenticate using Connected App + OAuth.
- Option B: Use Mule/ETL to call Salesforce REST API (`sObjects` endpoint) with Bulk API for large datasets.

## 3. Implement outbound integration (Salesforce → external)

- Use `HttpRequest` in Apex or Platform Events that middleware subscribes to.
- For large outbound datasets, use outbound messages or scheduled batch jobs.

## 4. Platform Events for decoupling

- Define a Platform Event `Onboarding_Event__e` with fields like EmployeeId, EventType, Payload
- Publish events from Flows or Apex. Middleware can subscribe and process asynchronously.

The screenshot shows the Salesforce Setup interface with the search bar containing "platfo". The left sidebar navigation includes sections like MuleSoft, Einstein, Custom Code, Integrations, Security, and Platform Encryption. The "Platform Events" section under Integrations is selected. The main content area displays the "Platform Event Definition Detail" for the "Onboarding\_Event" object. It shows fields such as Singular Label (Onboarding\_Event), Plural Label (Onboarding\_Events), Object Name (Onboarding\_Event), API Name (Onboarding\_Event\_e), Event Type (High Volume), Publish Behavior (Publish Immediately), and Created By (Manas Raghuwanshi). Below this are tables for "Standard Fields" and "Custom Fields & Relationships".

Action	Field Label	API Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Created Date	CreatedDate	Date/Time		
	Event UUID	EventUuid	Text(36)		
	Replay ID	ReplayId	External Lookup		

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit   Del	EventType	EventType__c	Text(50)			Manas Raghuwanshi, 9/26/2025, 4:52 AM
Edit   Del	Payload	Payload__c	Long Text Area(32768)			Manas Raghuwanshi, 9/26/2025, 4:52 AM
Edit   Del	Platform Event Onboarding_Event Help_f	Platform_Event_Onboarding_Event_Help_f__c	Text(18)			Manas Raghuwanshi, 9/26/2025, 4:51 AM

## 5. External Employee Portal (Experience Cloud)

- Setup → Digital Experiences → All Sites → New Site
  - Choose **Customer Account Portal** or **Build Your Own** template to create Employee Self-Service site.
  - Expose components: View/Upload Documents, View Tasks, Submit Approvals
  - Configure Guest/User sharing rules and permissions (use public access cautiously — prefer authenticated access)

Onboarding Tasks

All

8 items • Sorted by Task Name • Filtered by All onboarding tasks • Updated a few seconds ago

	Task Name	
1	<input type="checkbox"/> Complete ID Form	
2	<input type="checkbox"/> Complete ID Form	
3	<input type="checkbox"/> Complete ID Form	
...		

New Change Owner Printable View Assign Label

Search... User175792050...

## 6. Testing and monitoring

- Use Postman or a middleware test harness to test REST endpoints and OAuth flows.
- Monitor with Event Monitoring / API Usage dashboards.

# Phase 8 — Data Management & Deployment

**Goal:** Safely import initial data, prepare change sets or CI/CD for deployment, and back up metadata regularly.

## 1. Initial Data Load

- Prepare CSV files for Employee, OnboardingTask, Document. Ensure lookup IDs are handled: import Employees first, note new Salesforce IDs for later imports.
- Use Data Loader or Workbench to insert records. For large data sets, use Bulk API.
- Validate partial imports in a sandbox before production.

External_Task_Id__c	Employee__r.External_Employee_Id__c	Name	Status__c	DueDate__c
T-001	E-001	Laptop Setup	Not Started	2025-10-05
T-002	E-001	HR Orientation	Not Started	2025-10-06
T-003	E-002	Create Email Account	Not Started	2025-10-07
T-004	E-002	Assign Buddy	Not Started	2025-10-07
T-005	E-003	Software Access	Not Started	2025-10-08
T-006	E-003	Security Training	Not Started	2025-10-09
T-007	E-004	Workspace Setup	Not Started	2025-10-08
T-008	E-004	Complete Forms	Not Started	2025-10-09
T-009	E-005	Manager Intro	Not Started	2025-10-10
T-010	E-005	Team Lunch	Not Started	2025-10-10

External_Employee_Id__c	Name	Email
E-001	Manas Raghuvanshi	manas@example.com
E-002	Priya Sharma	priya@example.com
E-003	Amit Verma	amit@example.com
E-004	Sneha Kapoor	sneha@example.com
E-005	Rohit Singh	rohit@example.com

## 2. Data cleansing & validation

- Use duplicate rules and validation rules to prevent bad data.
- Run validation jobs (Apex or ETL) to check formats and missing required fields.

The screenshot shows a software interface titled "Load Upserts". At the top, there are three colored circles (red, grey, green) followed by the text "Load Upserts". In the top right corner, there is a blue cloud icon with the word "salesforce" written on it. Below the title, the text "Step 2: Select Salesforce object" is displayed. Underneath this, several status metrics are shown: "Import batch size: 200 Start at row: 0", "Current API usage for the org: 14", "API Limit for the org: 15,000", and "SOAP API version: 64.0". A section titled "Select Salesforce object to import:" contains a search bar with the placeholder "Search" and a list of objects. The list includes: Account (Account), Case (Case), Contact (Contact), Document (Document\_\_c), Employee (Employee\_\_c), Error Log (Error\_Log\_\_c), Event (Event), Lead (Lead), and Onboarding Task (OnboardingTask\_\_c). Below this list is a checkbox labeled "Show all Salesforce objects". At the bottom of the interface, there are buttons for "Import from (CSV file):" (with a "Browse..." button), and navigation buttons: "< Back", "Next >", "Cancel", and "Finish".

## 3. Deployment strategy

- For small teams: use Change Sets from Sandbox → Production. Include metadata: Objects, Flows, Apex, LWC, Permission Sets.
- For automated CI/CD: use SFDX pipeline (GitHub Actions / Jenkins) to push source to scratch orgs and run tests.

```
● Nothing to commit, working tree clean
● manasraghuwanshi onboarding-project $git push origin main

Enumerating objects: 28, done.
Counting objects: 100% (28/28), done.
Delta compression using up to 10 threads
Compressing objects: 100% (25/25), done.
Writing objects: 100% (27/27), 5.34 KiB | 5.34 MiB/s, done.
Total 27 (delta 4), reused 0 (delta 0), pack-reused 0 (from 0)
remote: Resolving deltas: 100% (4/4), completed with 1 local object.
To https://github.com/mangit955/Salesforce-Capstone-Project.git
  c2186e2..abffb58  main -> main
● manasraghuwanshi onboarding-project $git add
```

#### 4. Backup strategy

- Metadata backup: Use `sf force:source:retrieve` regularly and store in Git.
- Data backup: schedule exports (weekly/monthly) using Data Export, third-party backup tools, or custom Apex export jobs.

	<b>mangit955</b> metadata backup 2025-09-28T08:53:37+... abffb58 · 3 hours ago	
	force-app/main/default metadata backup 2025-09-2...	3 hours ago

Github repo link - [Onboard Platform](#)

# Phase 9 — Reporting, Dashboards & Security Review

**Goal:** Build actionable reports and dashboards to monitor onboarding KPIs; perform a security and field-level access audit.

## 1. Define KPIs

- Task completion rate (% completed within due date)
- Average time to onboard (hire date → task completion)
- Documents pending approval
- Manager approval times (average)

KPI	What it measures
Task completion rate	% of tasks completed on or before due date
Average onboarding time	Days from hire date → task completion
Documents pending approval	Count of documents not yet approved
Manager approval times	Average time managers take to approve tasks

## 2. Create Reports

- Use Report Builder to create Tabular / Summary / Matrix reports:
  - **Onboarding Tasks by Status** (group by Status\_\_c)
  - **Open Documents by Employee** (filter Status != Approved)
  - **Onboarding SLA** (calculate days between CreatedDate and CompletedDate)

Report: Onboarding Tasks  
Onboarding Tasks by Status

Total Records 7

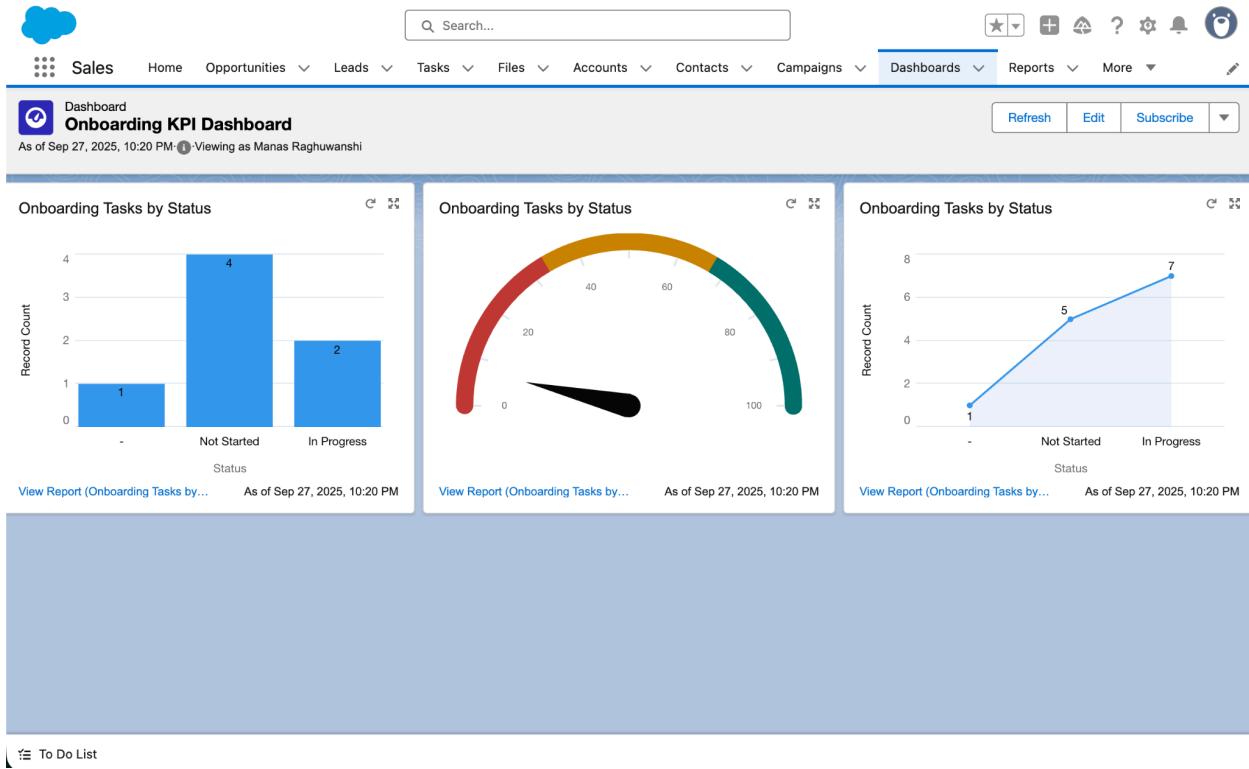
<input type="checkbox"/> Status ↑ ↘	Onboarding Task: Task Name ↘	Assigned Employee ↘	Due Date ↘
<input type="checkbox"/> - (1)	Onboarding guide followup	Asha Kumar	-
<b>Subtotal</b>			
<input type="checkbox"/> Not Started (4)	Complete ID Form	Raman Singh	7/1/2025
	Complete ID Form	harsh rathod	7/1/2025
	Complete ID Form	Test 1	7/1/2025
	Complete ID Form	test2	7/1/2025
<b>Subtotal</b>			
<input type="checkbox"/> In Progress (2)	Documents verification	-	9/25/2025
	Verify the Docs	-	10/10/2025
<b>Subtotal</b>			
<b>Total (7)</b>			

Row Counts  Detail Rows  Subtotals  Grand Total

To Do List

### 3. Create Dashboards

- Setup → Dashboards → New Dashboard
- Add components: charts for Tasks by Status, Gauge for % on-time completion, Table for overdue tasks
- Schedule dashboard refreshes (daily / weekly)



To Do List

#### 4. Security Review & Field-Level Audit

- Review Profiles & Permission Sets for HR, Manager, Employee — confirm least privilege.
- Run the Field Accessibility viewer for key objects (Employee, OnboardingTask, Document).
- Validate Sharing Settings (Owd for objects) and sharing rules for visibility.
- Check for any Apex classes with `without sharing` that might expose data.

#### 5. Compliance checks

- Ensure PII fields are encrypted or restricted in access per policy.
- If storing sensitive documents, confirm encryption at rest and proper access controls.

# Phase 10 — Project Video

**Video Link:** [View Here](#)

**GitHub Link:** [Onboard Platform](#)