Workforce Administration Solution

Introduction:

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

Milestone - 1

Salesforce

Types of Salesforce Editions:

1. Essentials

Designed for small businesses getting started with CRM to boost sales or service productivity. It includes a setup assistant and administration tools to customize your deployment as you grow.

2. Professional

Designed for businesses requiring full-featured CRM functionality. It includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small to midsize deployment.

3. Enterprise

Meets the needs of large and complex businesses. It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition, that can support large-scale deployments. Enterprise Edition also includes access to Salesforce APIs, so you can easily integrate with back-office systems.

4. Unlimited

   Maximizes your success and extends it across the entire enterprise through the Lightning Platform. It gives you new levels of platform flexibility for managing and sharing all your information on demand. Includes all Enterprise Edition functionality, Premier Support, full mobile access, unlimited custom apps, increased storage limits, and other features.

5. Developer

Provides access to the Lightning Platform and APIs. It lets developers extend Salesforce, integrate with other applications, and develop new tools and applications.

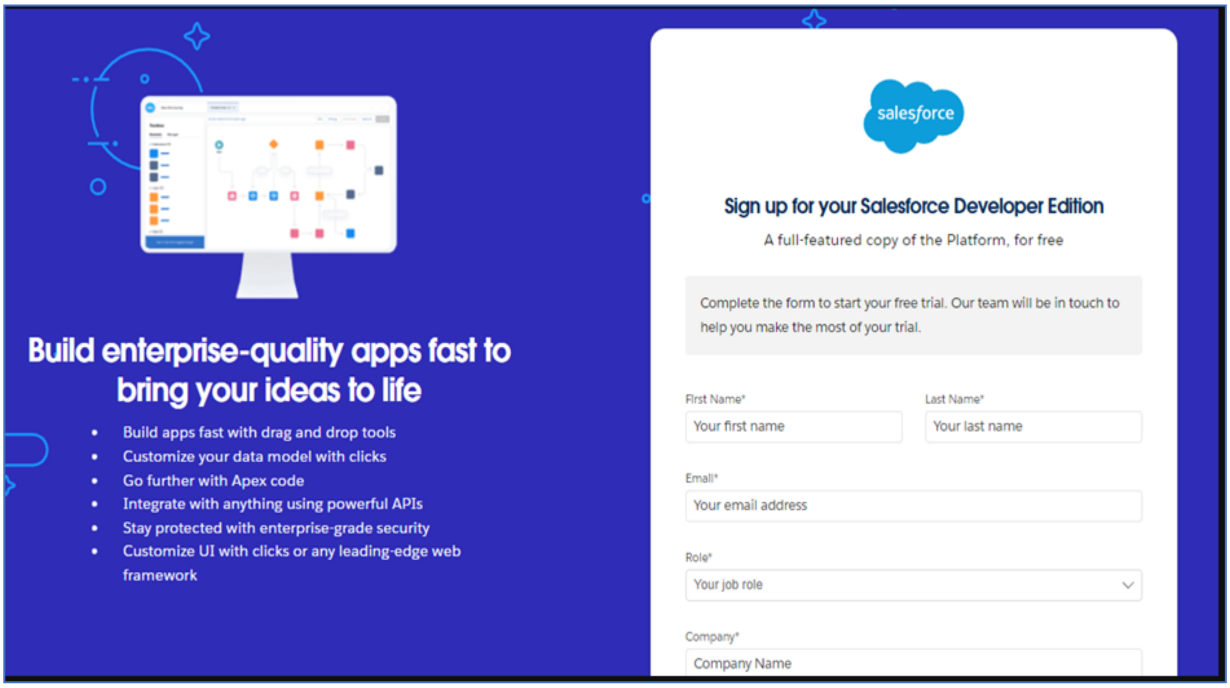
Developer Edition also provides access to many of the features available in Enterprise Edition

Let’s begin with creating our Salesforce Developer Account

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 :

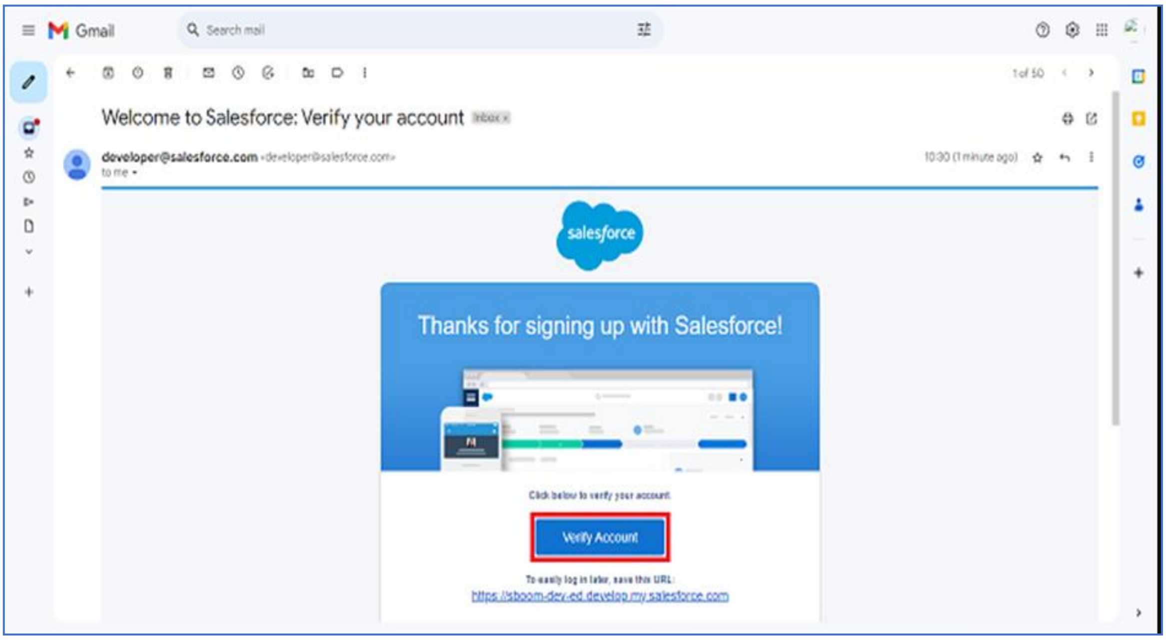


1) First name & Last name
2) Email
3) Role : Developer
4) Company : College Name
5) County : India
6) Postal Code : pin code
7) Username : should be a combination of your name and company
8) Click on Sign me up.

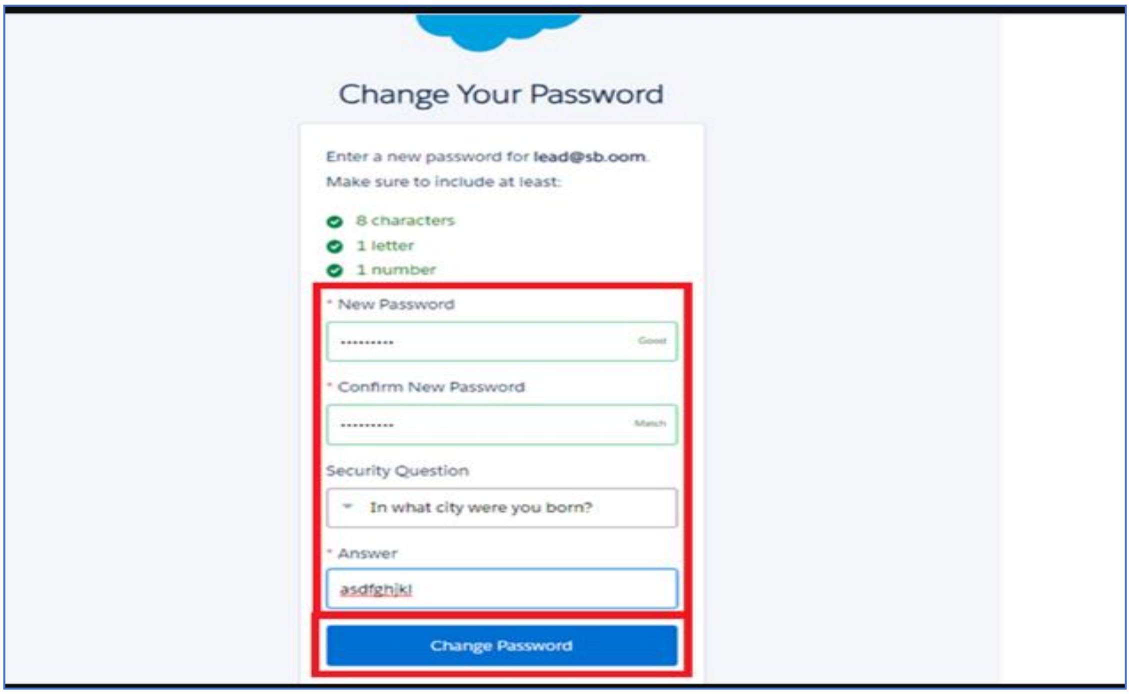
This need not be an actual email id, you can give anything in the format : username@organization.com
Click on sign me up after filling these.

Activity 2: Account Activation

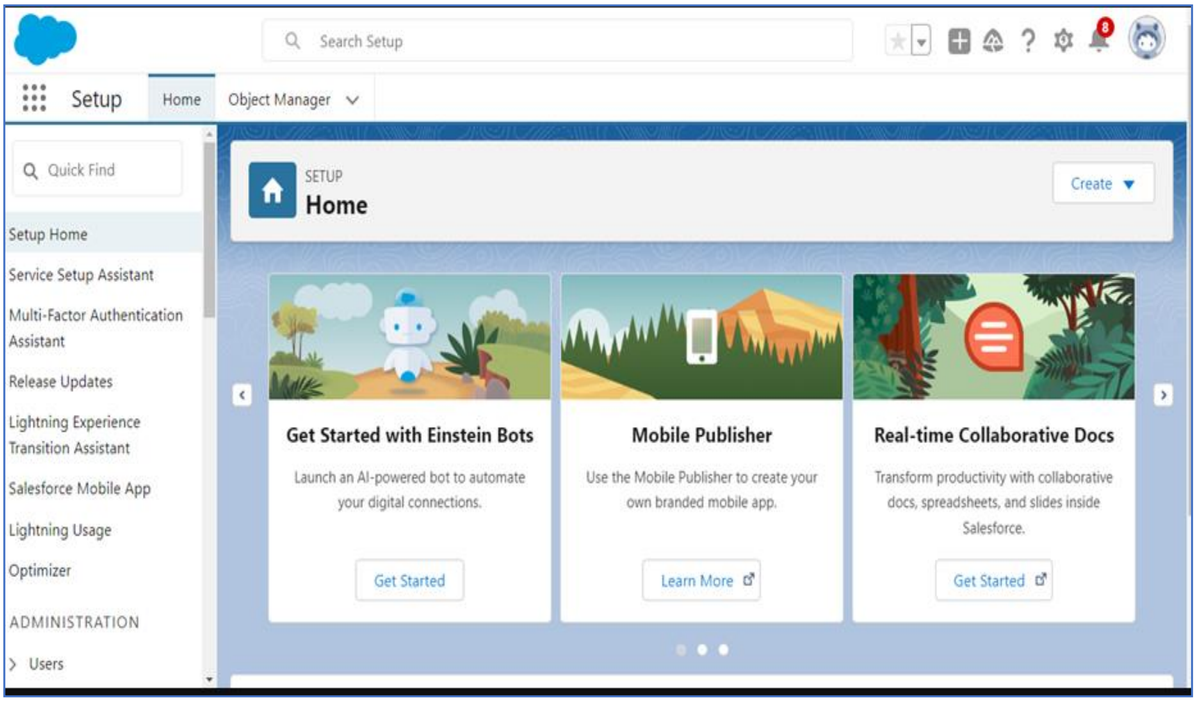
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



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.



Milestone - 2

Object

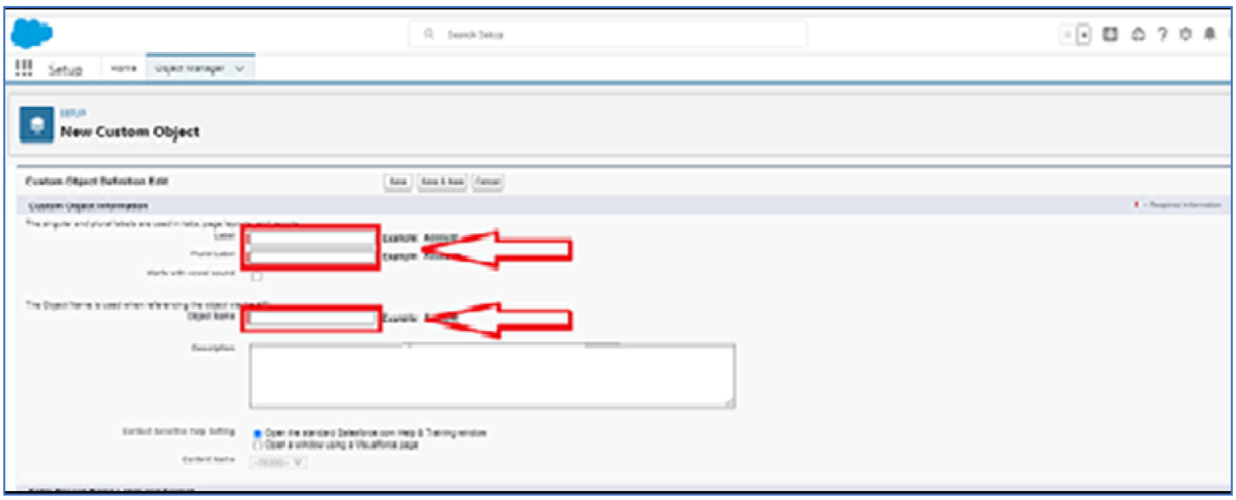
Activity 1: Create Employee Object

The purpose of creating an Employee custom object is to keep track the employee's activities and their individual and as well as team progress.

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



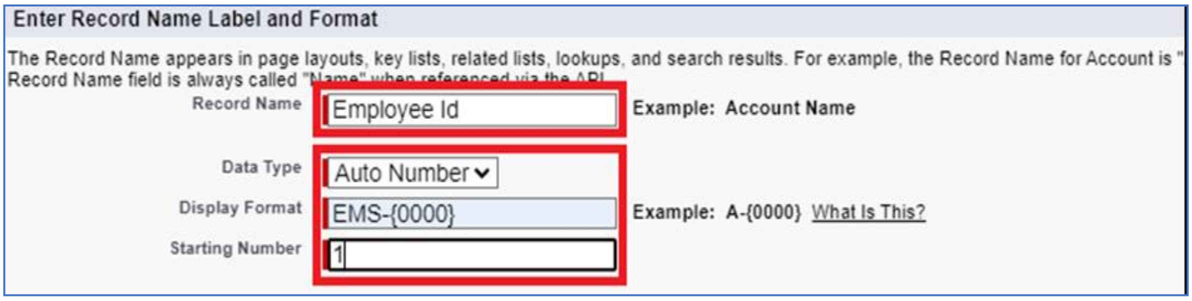
3) Enter Record Name Label and Format

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

The purpose of creating a project object is to have detailed information about the on-going and completed projects in the organization.

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--> Project
2) Plural label name--> Projects
3) Enter Record Name Label and Format

    1. Record Name : Project ID

    2. Data Type : Auto Number

    3. Display Format : Proj-{0000}

    4. Starting Number : 1

2. Click on Allow reports,

3. Allow search --> Save.

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

Note: use “Text” as a data type and label Record Name as “Project Task Name”.

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: Project Task
    2) Plural label name: Project Tasks
    3) Enter Record Name Label and Format

        1.Record Name : Project Task Name

        2.Data Type : Text

        3.Display Format : EMS-{0000}

        4.Starting Number : 1

Note: use “Text” as a data type and label Record Name as “Asset name”.

1. From the setup page --> Click on Object Manager --> Click on Create --> Click on Custom Object.

    1) Enter the label name: Asset
    2) Plural label name: Assets

3) Enter Record Name Label and Format

    1.Record Name : Asset Name

    2.Data Type : Text

    3.Display Format : EMS-{0000}

    4.Starting Number : 1

Note: use "Text" as a data type and label Record Name as "Asset Service Name".

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: Asset Service
    2) Plural label name: Asset Services

    3) Enter Record Name Label and Format

        1.Record Name : Asset Service Name

        2.Data Type : Text

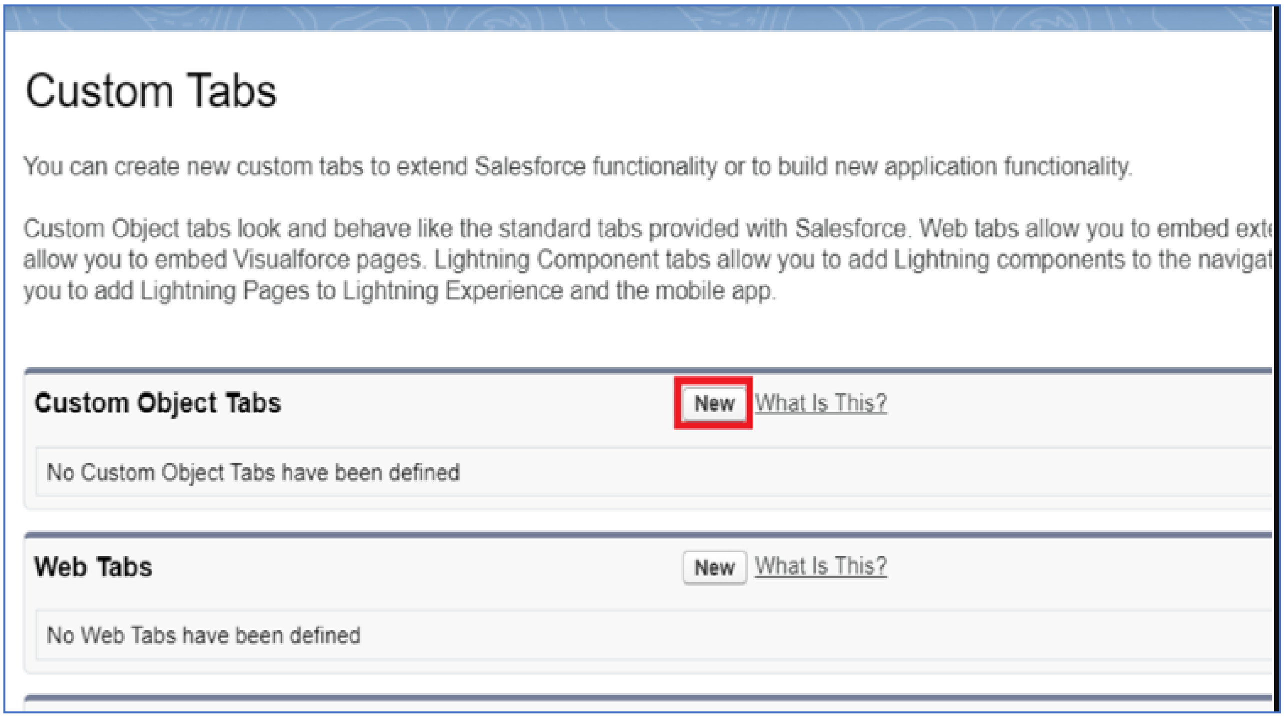
        3.Display Format : EMS-{0000}

        4.Starting Number : 1

Milestone - 3
Tabs

Activity 1: Creating a Custom Tab (Employee)
To create a 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)

1. Go to setup page --> type Tabs in Quick Find bar --> click on tabs --> New (under custom object tab)

2. Select Object(Project) --> Select the tab style ?--> Next (Add to profiles page) keep it as default --> Next (Add to Custom App) keep it as default --> Save.

Activity 3: Creating tabs for remaining objects

Now create tabs for Project Task, Asset, Asset Service objects.

To create a Tab:(Project Task)

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

To create a Tab:(Asset)

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

To create a Tab:(Asset Service)

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

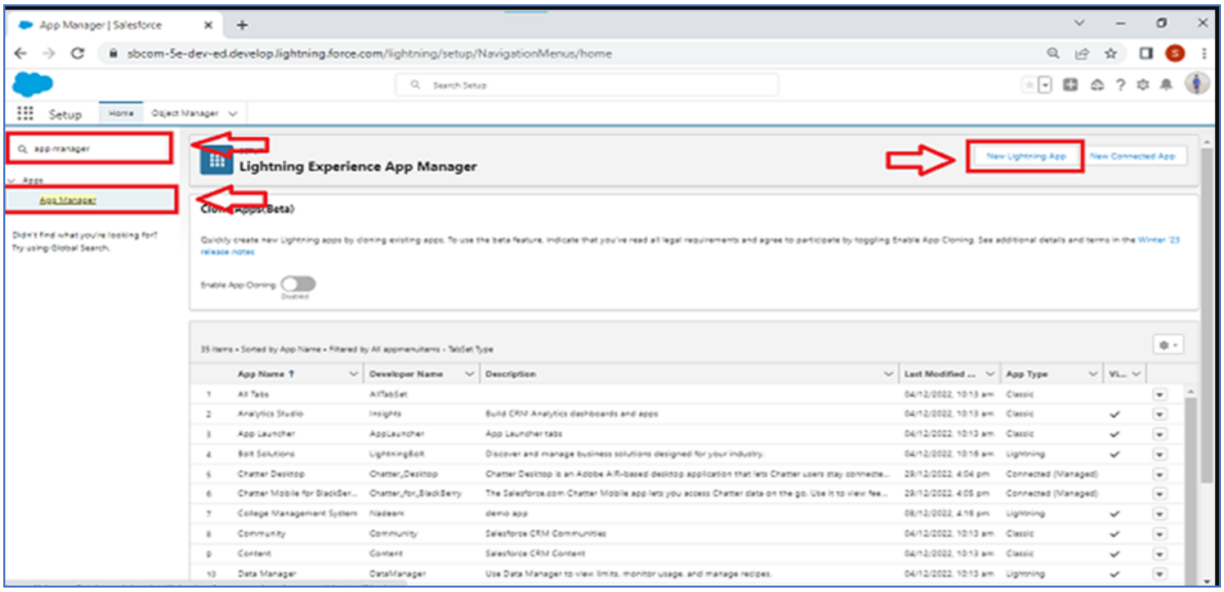
Milestone – 4

The Lightning App

Activity 1: Create a Lightning App

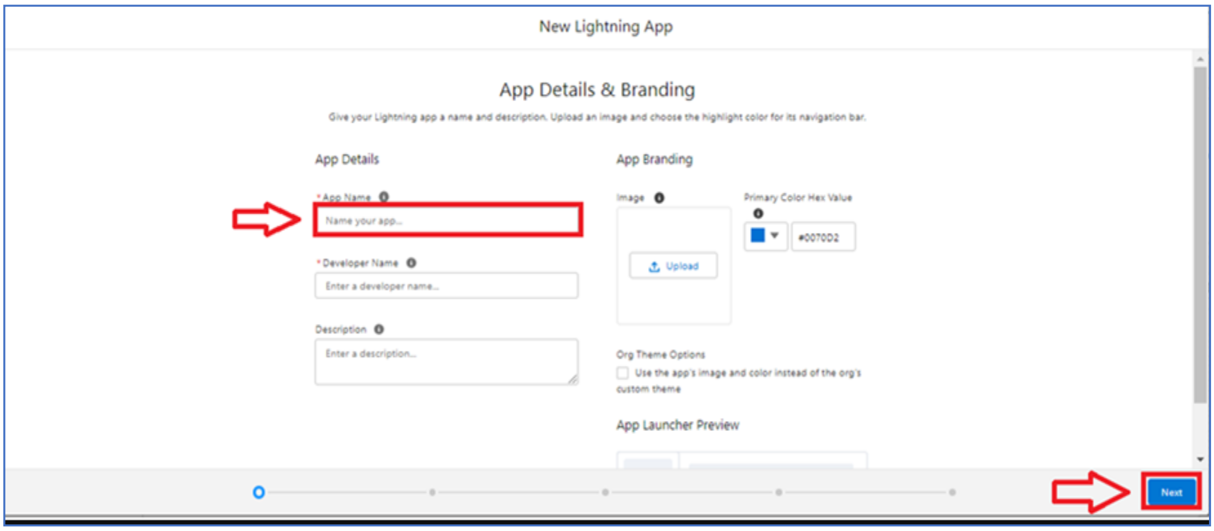
To create a lightning app page:

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

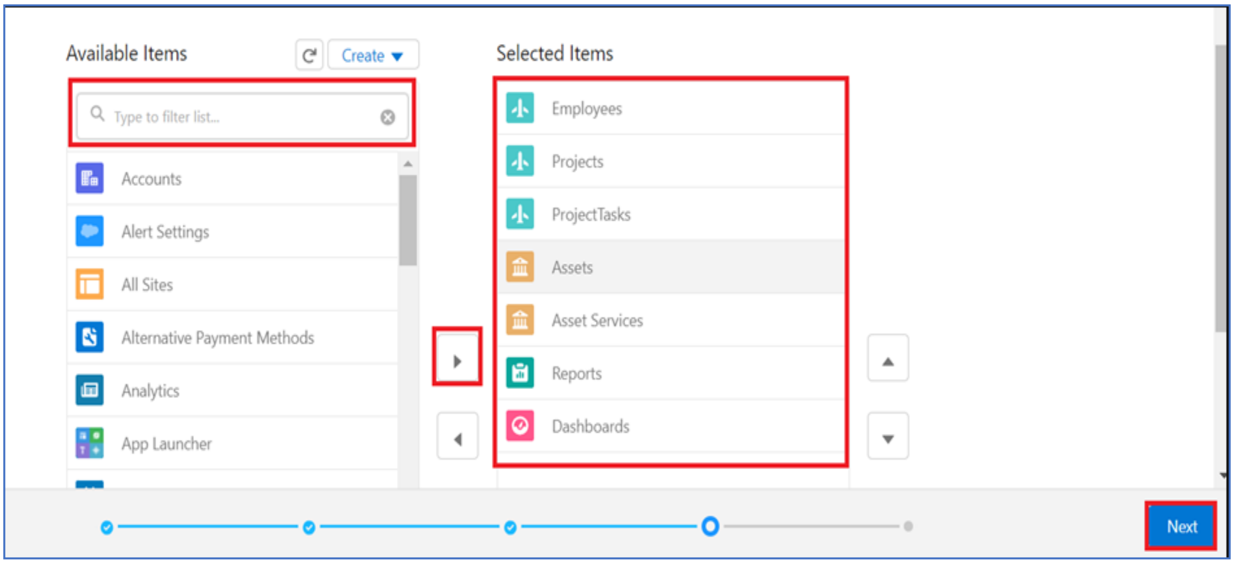


2. Fill the app name in app details and branding as follow
 App Name : Workforce Administrator Solution
 Developer Name : this will auto populated
 Description : Give a meaningful description
 Image : optional (if you want to give any image you can otherwise not mandatory)
 Primary color hex value : keep this default

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



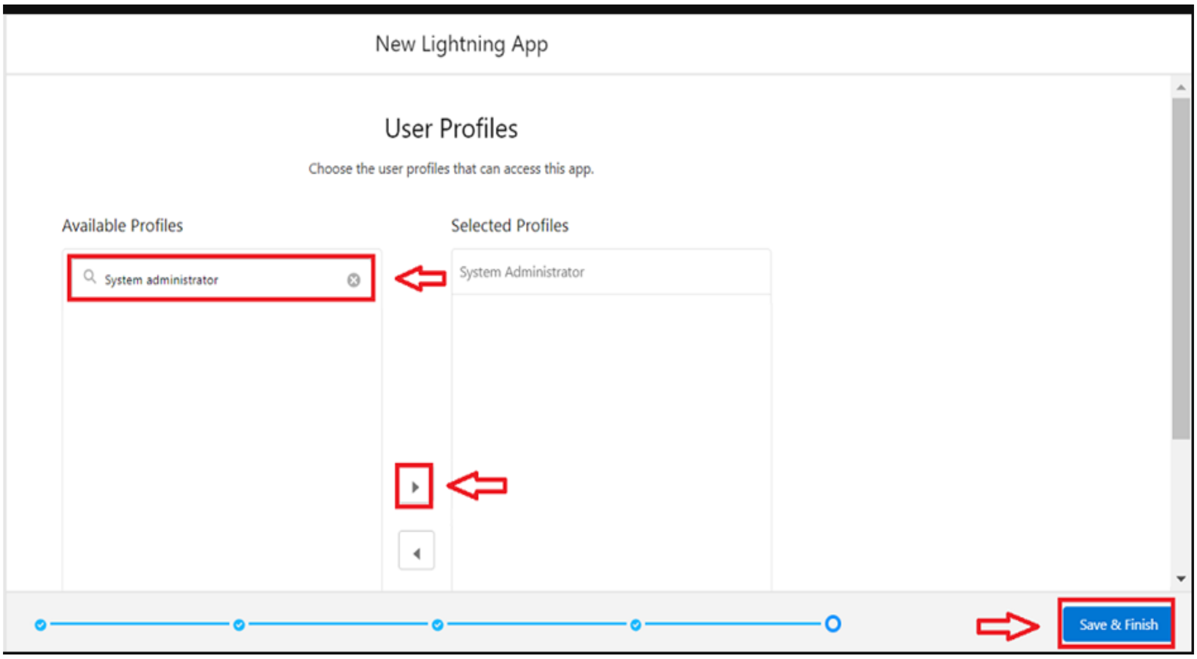
4. To Add Navigation Items:



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.

Note: select asset the custom object which we have created in the previous activity.

5. To Add User Profiles:



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

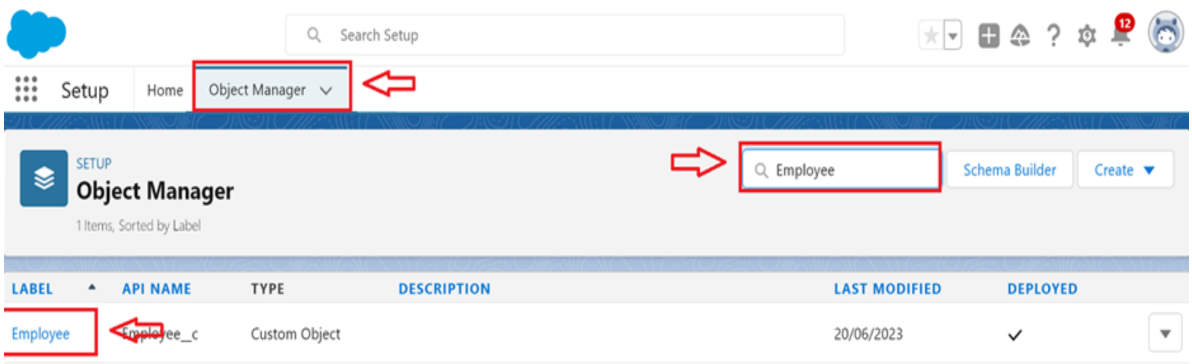
Milestone – 5

Fields & Relationships

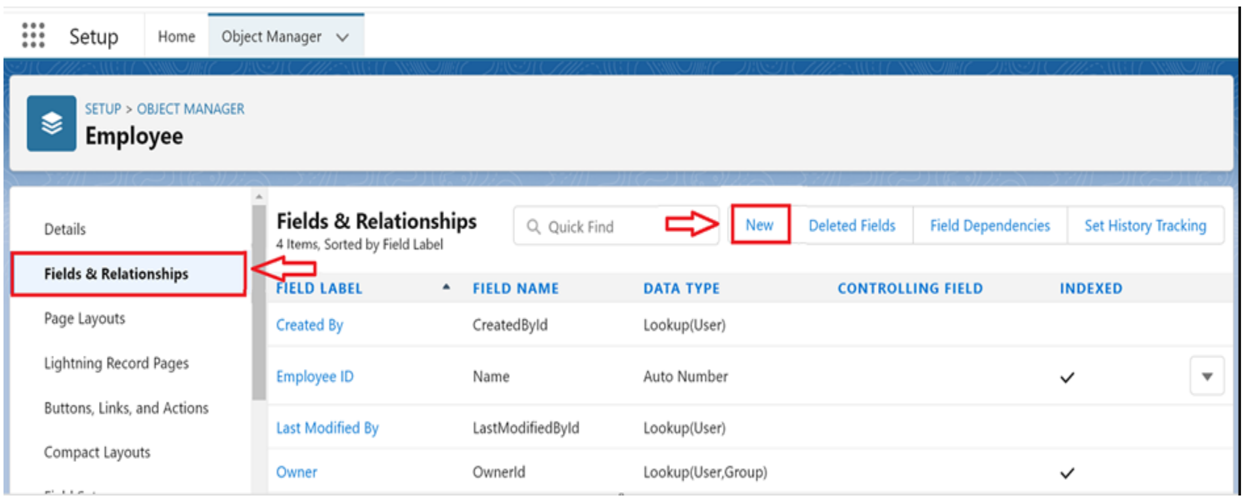
Activity 1 : Creating Text Field in Employee Object

To create fields in an object:

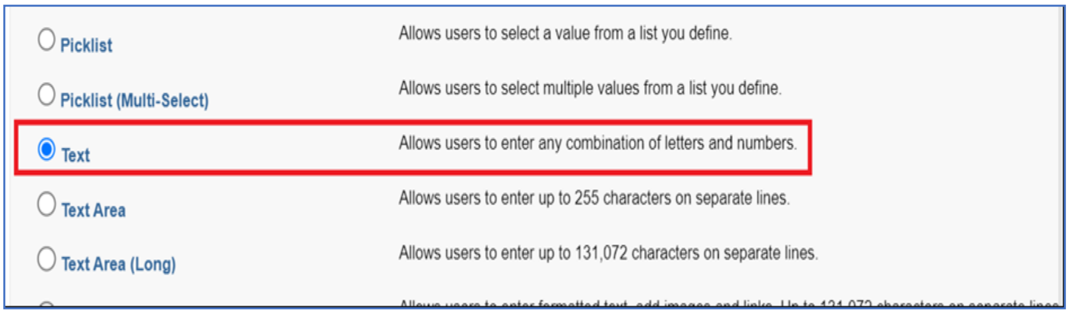
1. Go to setup --> click on Object Manager --> type object name(Employee) in quick find bar --> click on the object.



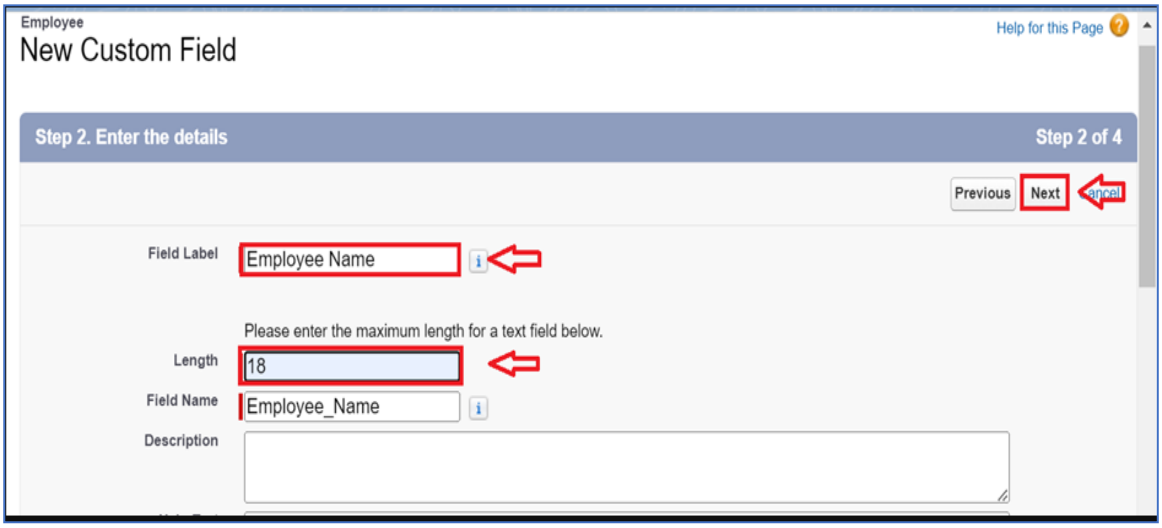
2. Now click on “Fields & Relationships” --> New



3. Select Data type as “Text”.



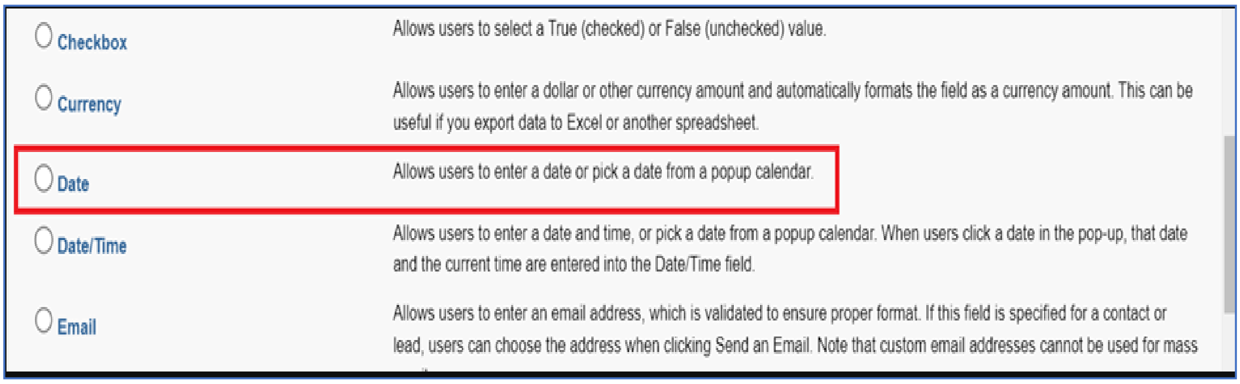
4. Click on Next



5. Fill the above as following:
   1) Field Label: Employee Name
   2) Length : 18
   3) Field Name : gets auto generated
   4) Click on Next --> Next --> Save and new.

Activity 2 : Creating Date of Birth Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “Date” and click Next.



3. Click on Next.
4. Fill the above as following:

   a. Field Label: Date of Birth.
   b. Field Name : gets auto generated.
   c. Click on Next --> Next --> Save and new.

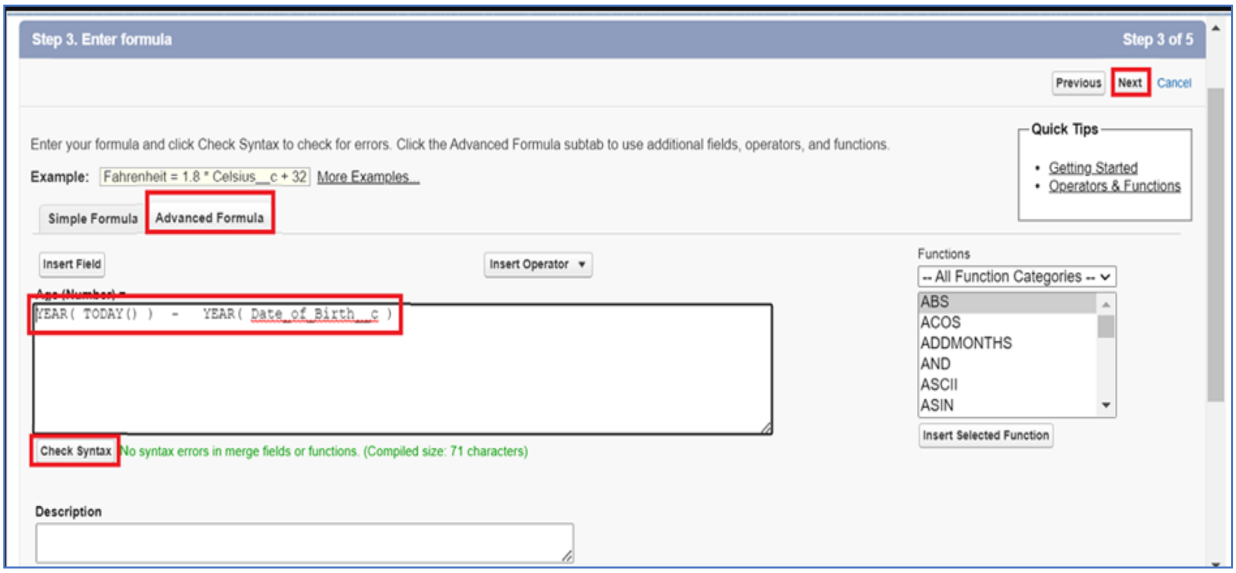
Activity 3 : Creating Formula Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1

2. Select Data type as “Formula” and click Next.

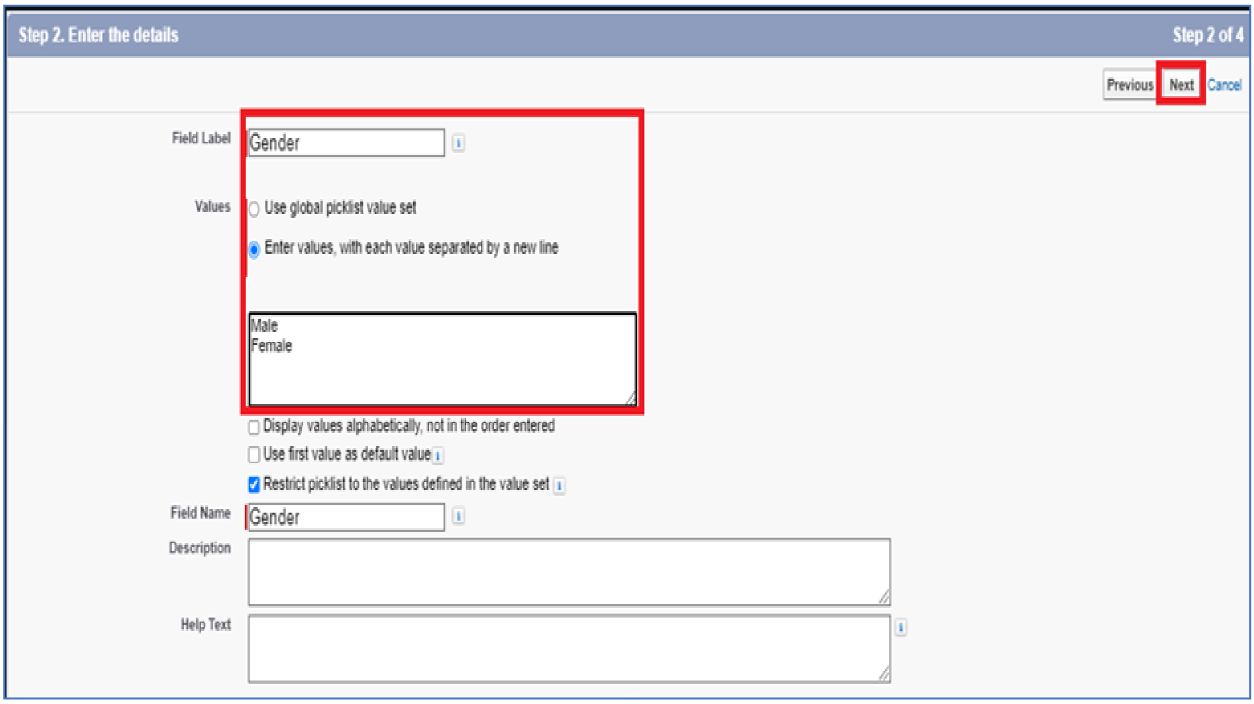
3. Give Field Label and Field Name as “Age” and select formula return type as “Number” and click next.

3.Under Advanced Formula write down the formula and click “Check Syntax” and Next --> Next --> Save & New.



Activity 4 : Creating Picklist Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “Picklist” and click Next.
3. Enter Field Label as “Gender”, under values select “Enter values, with each value separated by a new line" and enter values as shown below.



4. Click Next --> Next --> Next --> Save & New.

Activity 5 : Creating Self-Relationship Field in Employee Object

1. . Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “Lookup Relationship” and click Next.
3. Select Employee from the drop down related to the field and click Next.

4. Give Field Label as “Reports to” and click Next.
5. Next --> Next --> Save & New.

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

To Create a Master-Detail relationship

1. Go to the setup page --> click on object manager --> type object name (ProjectTask) in the quick find bar --> click on the object.
2. Click on fields & relationship --> click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. For field label related to: select “Employee” object and click Next.
5. Give Field Label as “Employee Name” and click Next.
6. Next --> Next --> Save & New.

Activity 7 : Creating Remaining Fields in Employee Object

Now create the remaining fields using the data types mentioned in the table.

<table>
<tr><th rowspan="2">S.No.</th><th rowspan="2">Object Name</th><th colspan="3">Field</th></tr>
<tr><th>S.No.</th><th>Field Name</th><th>Data Type</th></tr>
<tr><td rowspan="16">1</td><td rowspan="16">Employee</td><td>1</td><td>Qualification</td><td>Text</td></tr>
<tr><td>2</td><td>Address</td><td>Text Area</td></tr>
<tr><td>3</td><td>Experience</td><td>Text Area</td></tr>
<tr><td>4</td><td>Phone No</td><td>Phone</td></tr>
<tr><td>5</td><td>Email</td><td>Email</td></tr>
<tr><td>6</td><td>Joining Date</td><td>Date</td></tr>
<tr><td>7</td><td>Mode of Work</td><td>Picklist:
Values
On Site
Remote</td></tr>
<tr><td>8</td><td>Cab Allowance</td><td>Check Box</td></tr>
<tr><td>9</td><td>Food Allowances</td><td>Check Box</td></tr>
<tr><td>10</td><td>Wife Allowances</td><td>Check Box</td></tr>
<tr><td>11</td><td>Cab Allowances</td><td>Check Box</td></tr>
<tr><td>12</td><td>Food Allowance Amount</td><td>Currency</td></tr>
<tr><td>13</td><td>Wifi Allowances Amount</td><td>Currency</td></tr>
<tr><td>14</td><td>Login Time</td><td>Time</td></tr>
<tr><td>15</td><td>Logout Time</td><td>Time</td></tr>
<tr><td>16</td><td>LinkedIn Profile</td><td>Url</td></tr>
<tr><td rowspan="5">2</td><td rowspan="5">Project</td><td>1</td><td>Project Name</td><td>Text</td></tr>
<tr><td>2</td><td>Project Lead</td><td>Text</td></tr>
<tr><td>3</td><td>Start Date</td><td>Date</td></tr>
<tr><td>4</td><td>End Date</td><td>Date</td></tr>
<tr><td>5</td><td>Project Status</td><td>Picklist:
Values
Completed
On Going
Not Yet
Started</td></tr>
</table>

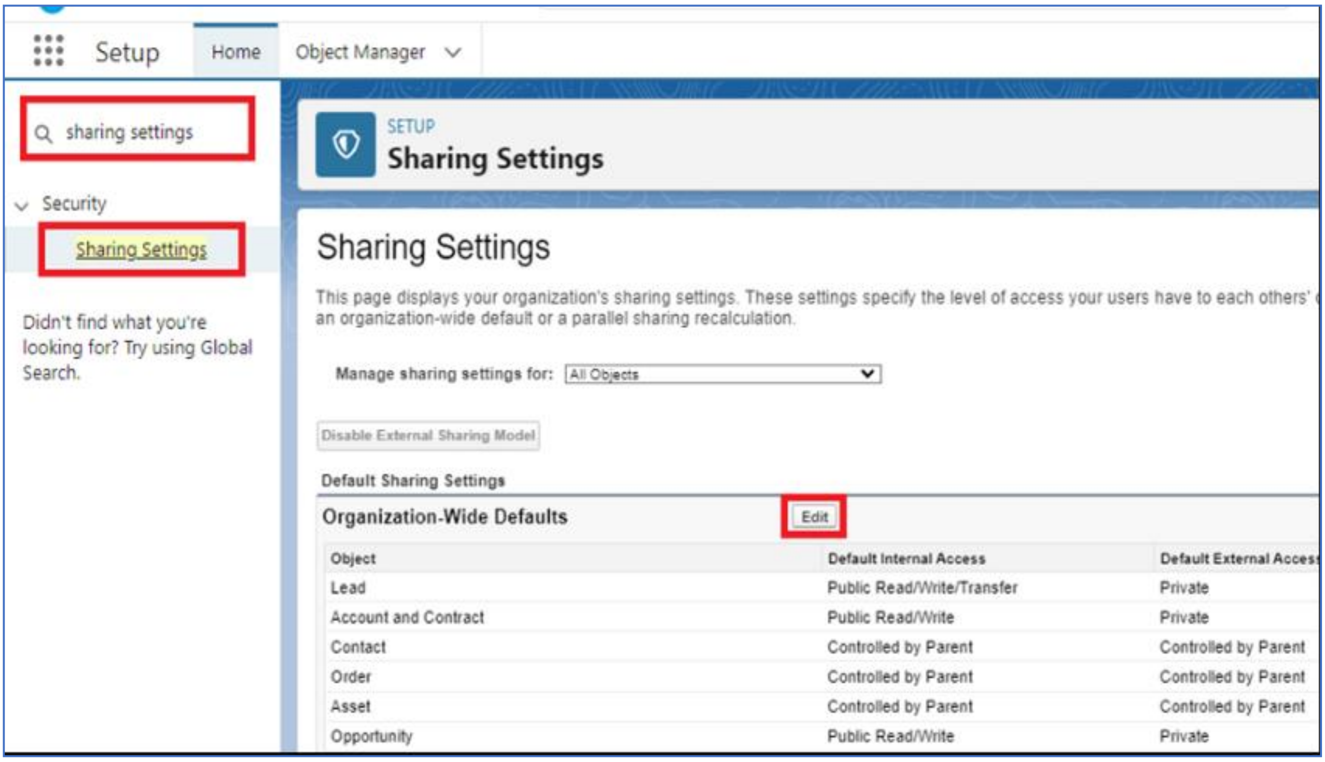
S.No	Object Name	Fields		
		S.No	Field Name	Data Type
3	Project Task	1	Project Task	MDR With Project Object
		2	Finishes in	Formula: (Project_Task__r.Start_Date__c - Project_Task__r.End_Date__c) Formula return type: Number
		3	Working Hours	Numbers
		4	Employee Name	Master Detail relationship with Employee object
4	Asset Service	1	Asset Id	Lookup relationship with Asset object
		2	Type	Picklist: Values Technical Issue Non Technical Issue
		3	Technician	Text
		4	Subject	Text Area
		5	Description	Text Long
5	Asset	1	Asset Type	Picklist: Values Charger laptop Mouse Monitor CPU
		2	Model Name	Text
		3	Employee Name	Lookup relationship with Employee Object
		4	Date Of Issue	Formula (Joining date) Formula Return type: date

Milestone – 6

Setting OWD

Activity 1: Create OWD Setting

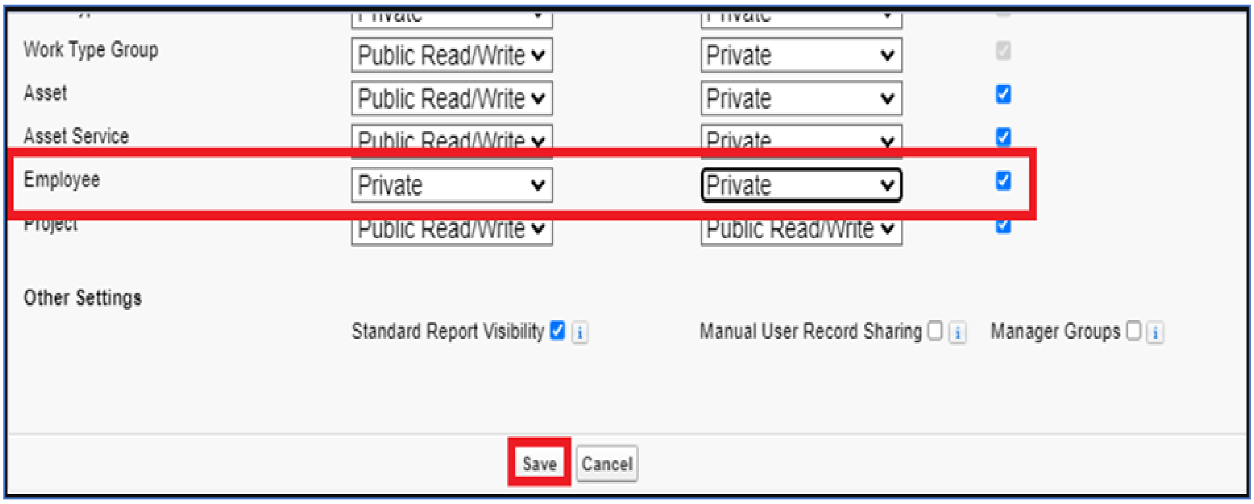
1. Go to Set Up --> in the Quick Find box type "Sharing Settings" --> click on it.
2. Click Edit in the Organization-Wide Defaults area.



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.

Activity 2:

Set OWD as Private for Project and Asset Service objects.

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. 3. Search for the project object.
4. 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. 5. Click on save.

Next step

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. 3. Search for the Asset service object.
4. 4.Under default internal access and default external access change the options to "Private" and under grant access using hierarchies select the check box.

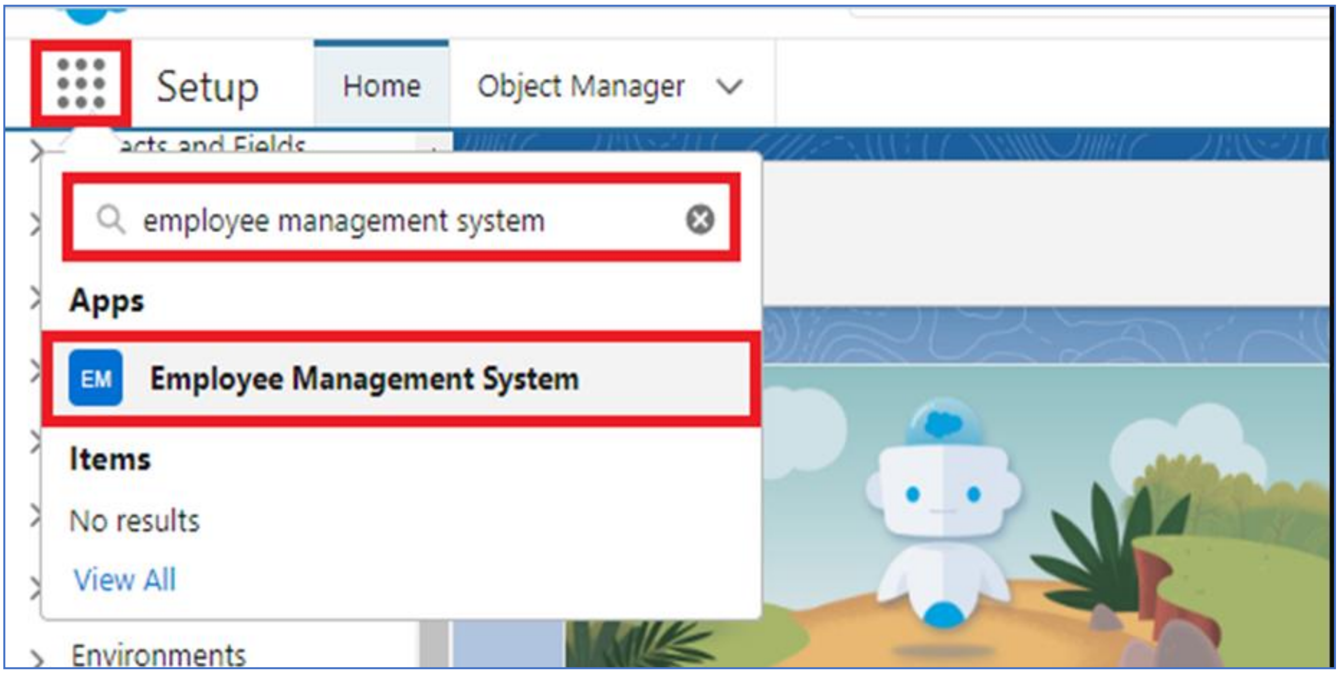
5. Click on save.

Milestone – 7

User Adoption

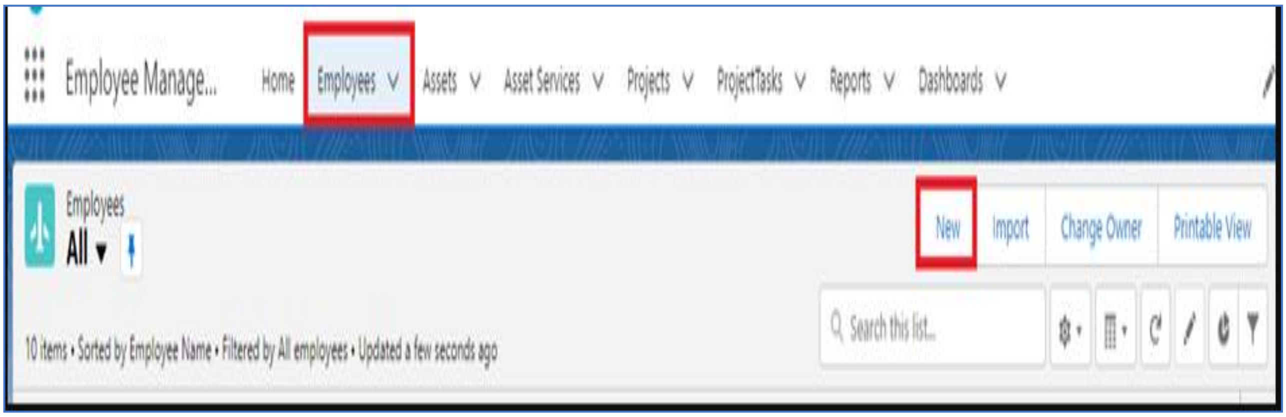
Activity 1: Create a Record (Employee)

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)

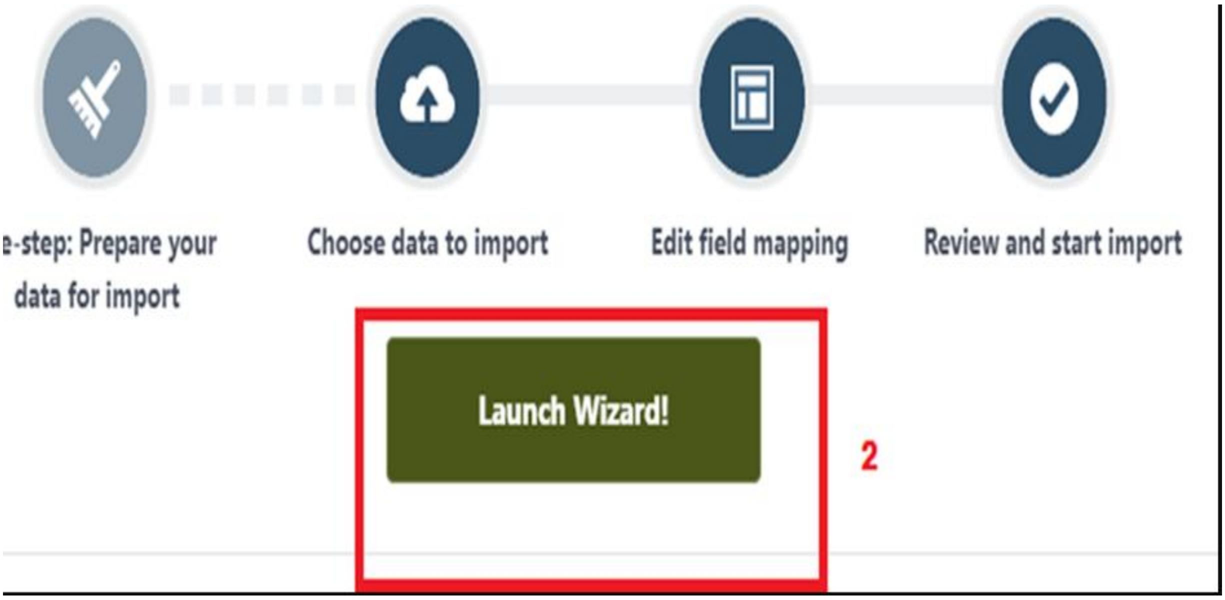
1. Click on App Launcher on the left side of the screen.
2. Search Employee Management System & click on it.
3. Click on the Employee Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete.

Milestone – 8
Import data

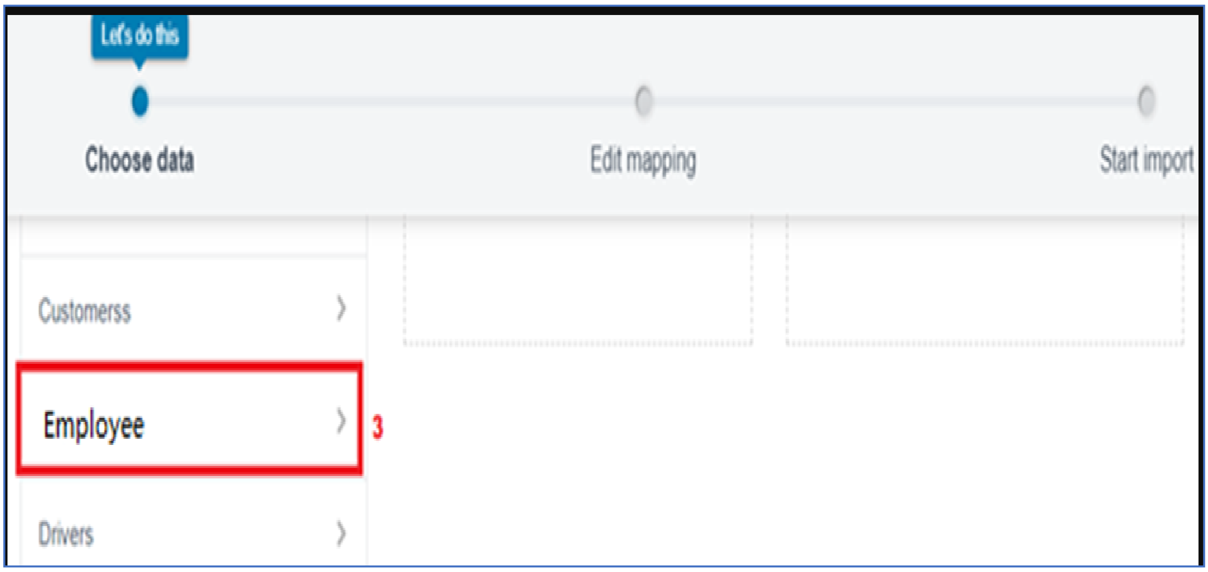
Activity-1: Importing data using Data Wizard

1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.

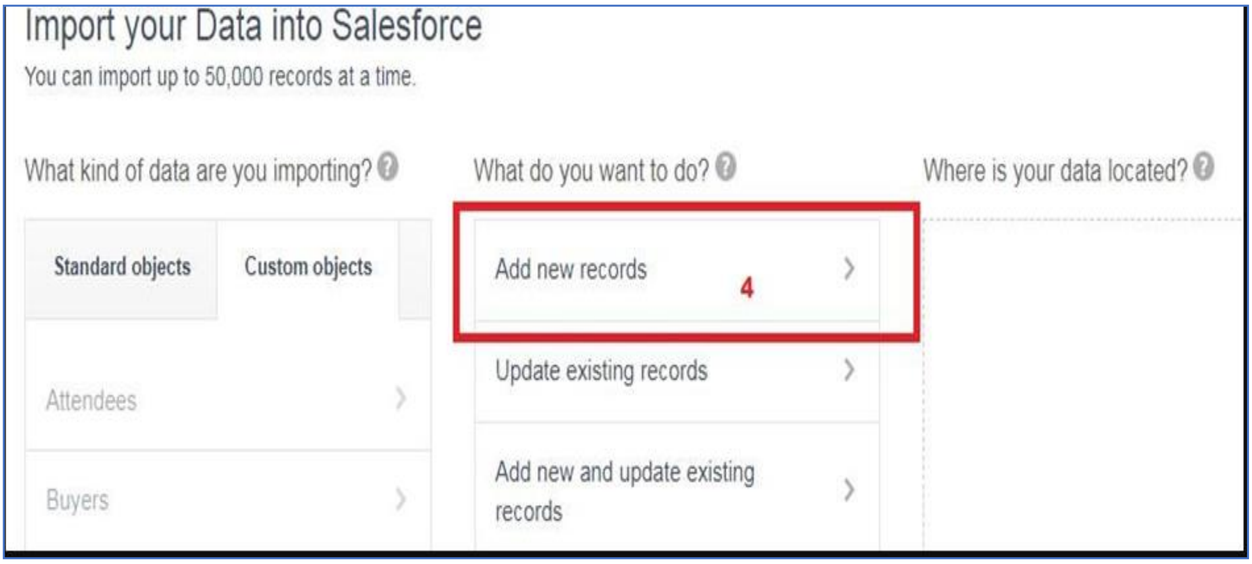
3. Click Launch Wizard!



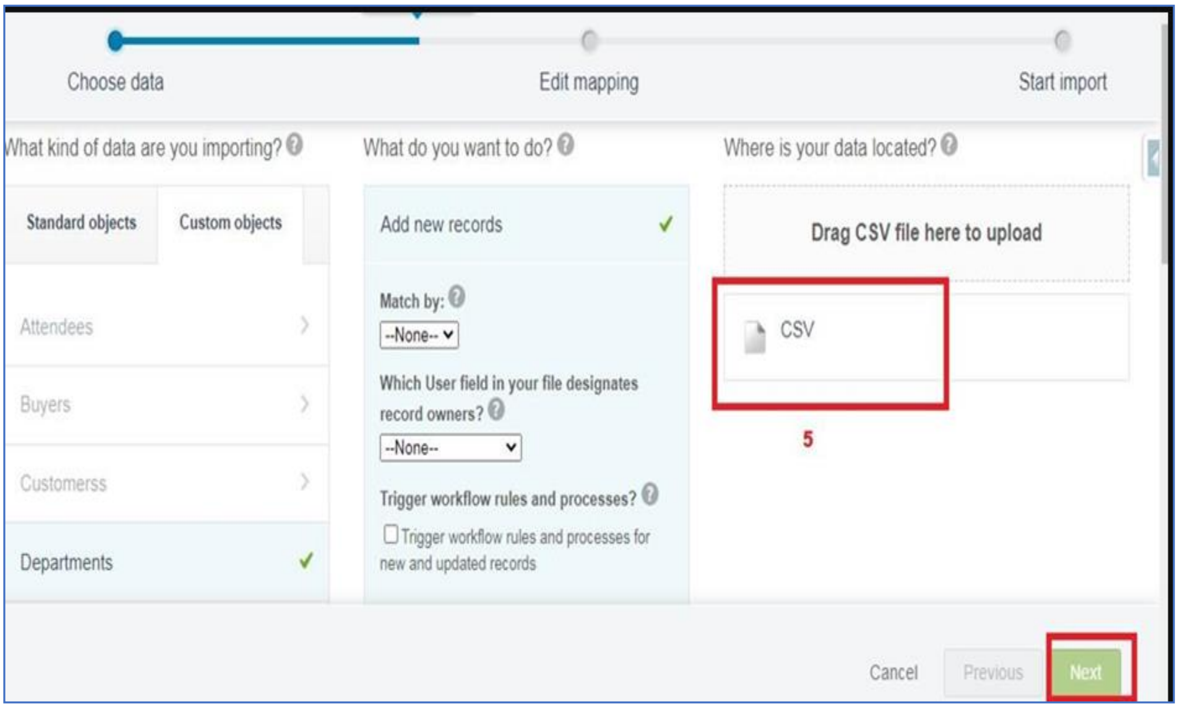
4. Click the Custom Objects tab and select the Employee object.



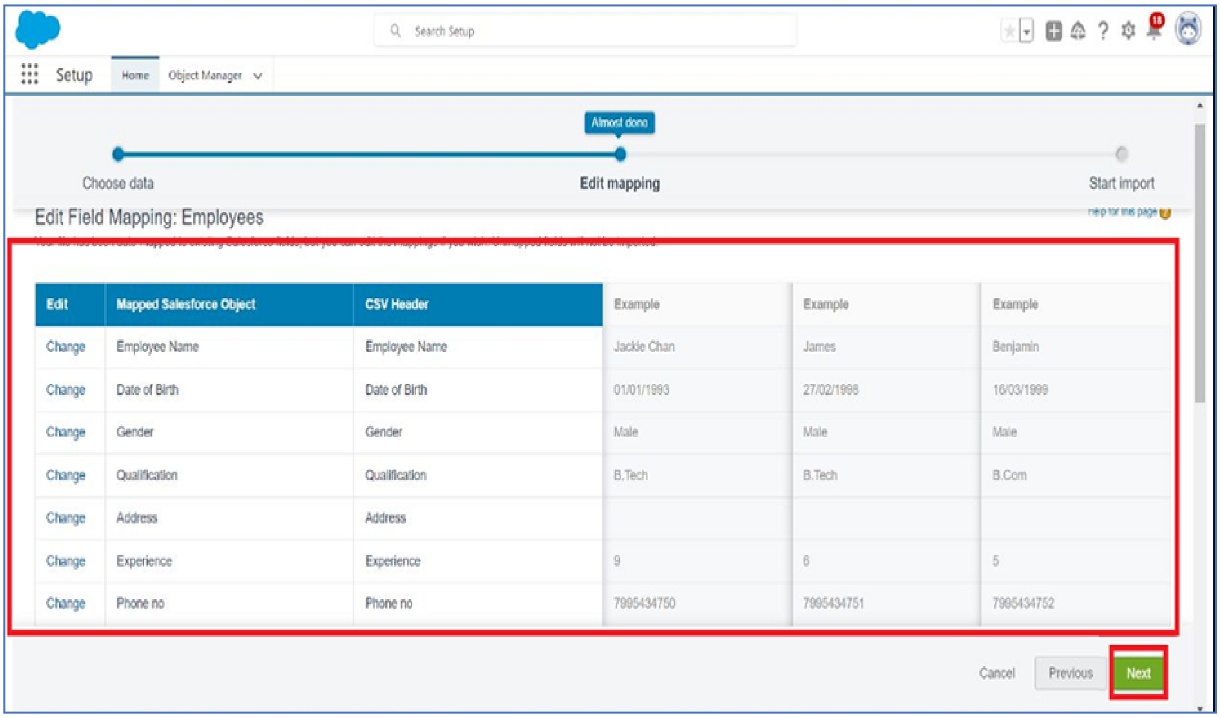
5. Select Add new records.



6. Click CSV and choose file Employee_CSV which we made earlier. Click Next.

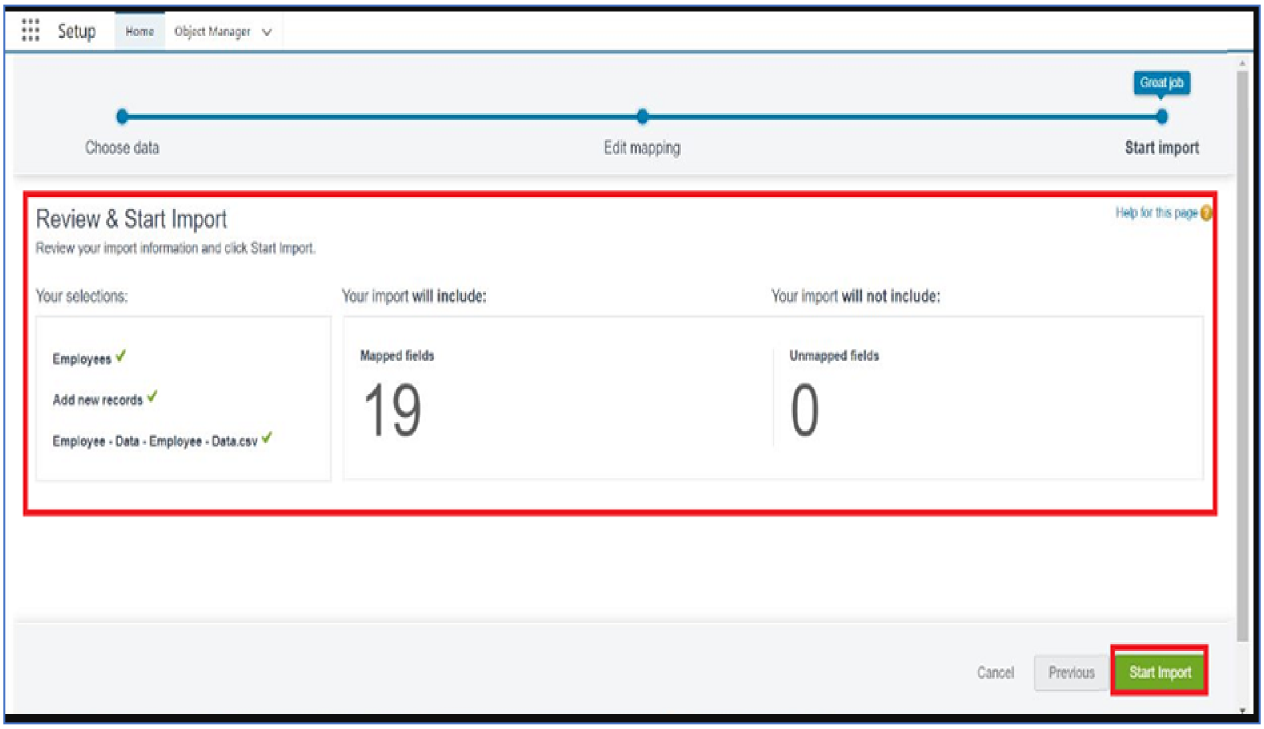


7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.

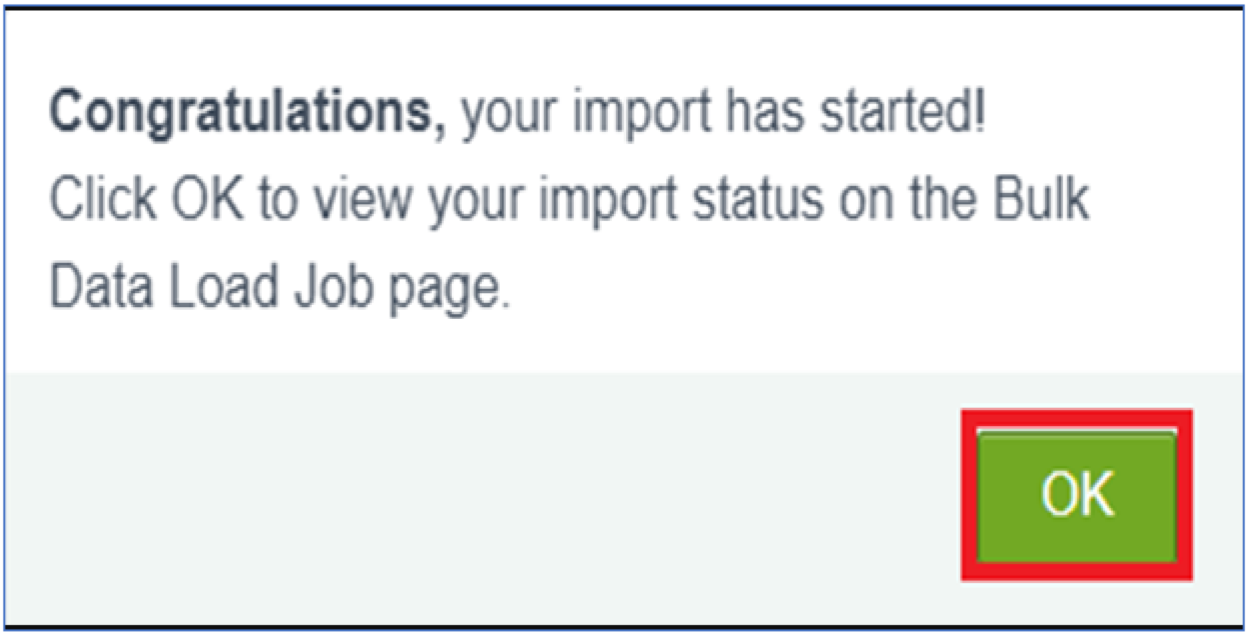


Note: no need to map "Reports to" field. The Data Import Wizard is designed to handle basic data import tasks and does not support mapping relationships between records.

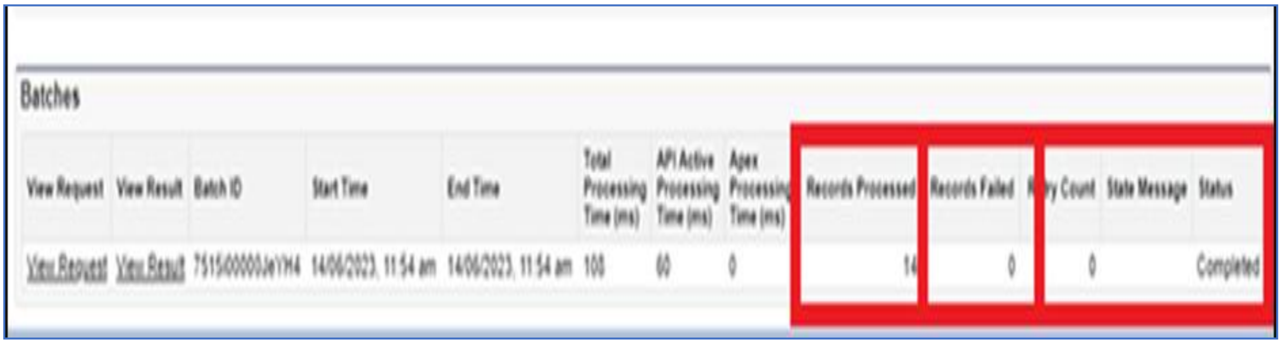
8. The next screen gives you a summary of your data import. Click Start Import.



9. Click OK on the popup.



10. Scroll down the page and verify that your data has been imported under batches.



Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	R[illegible]y Count	State Message	Status
View Request	View Result	7515i00000JeYH4	14/06/2023, 11:54 am	14/06/2023, 11:54 am	108	60	0	14	0	0		Completed

11. Make sure you have 0 records under the records failed column.

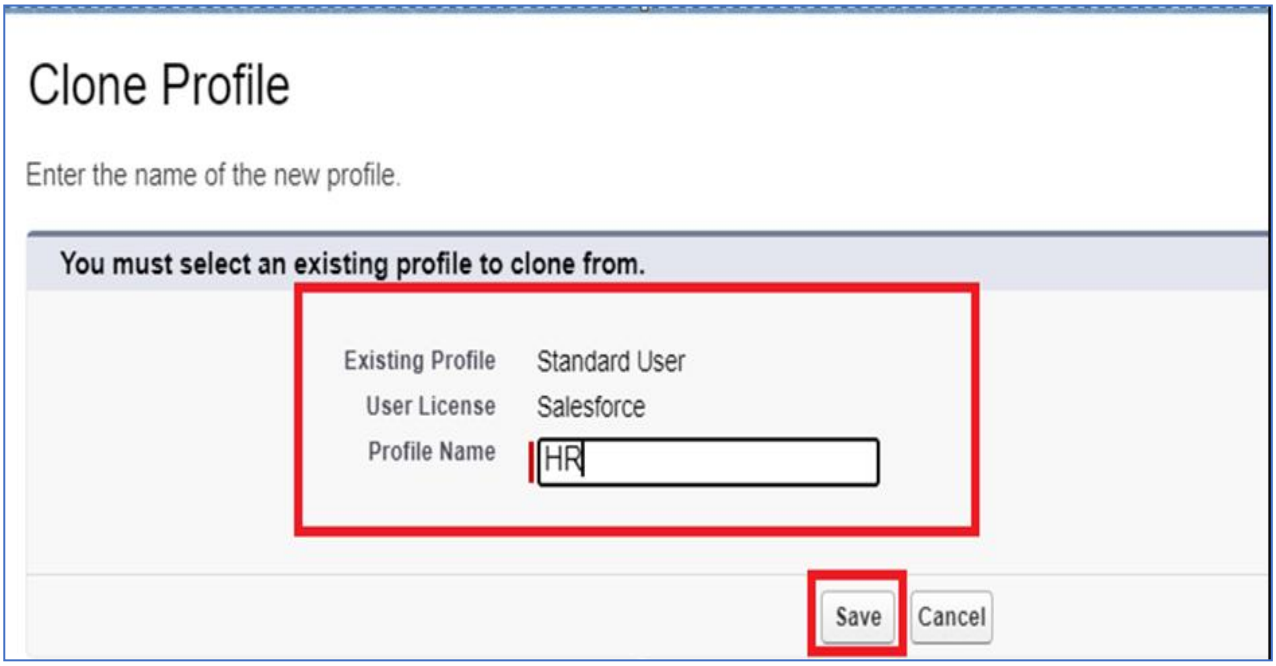
Milestone – 9

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.



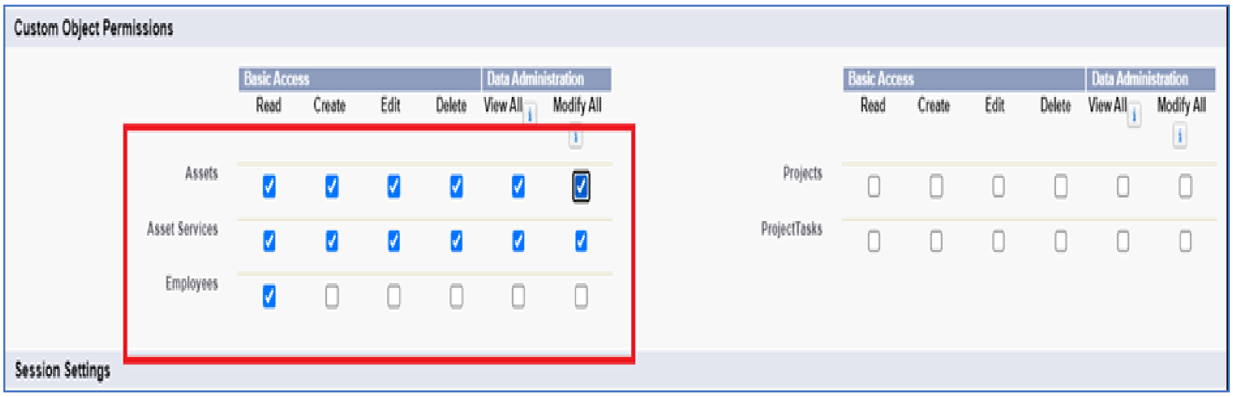
2. While still on the profile page, then click Edit

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

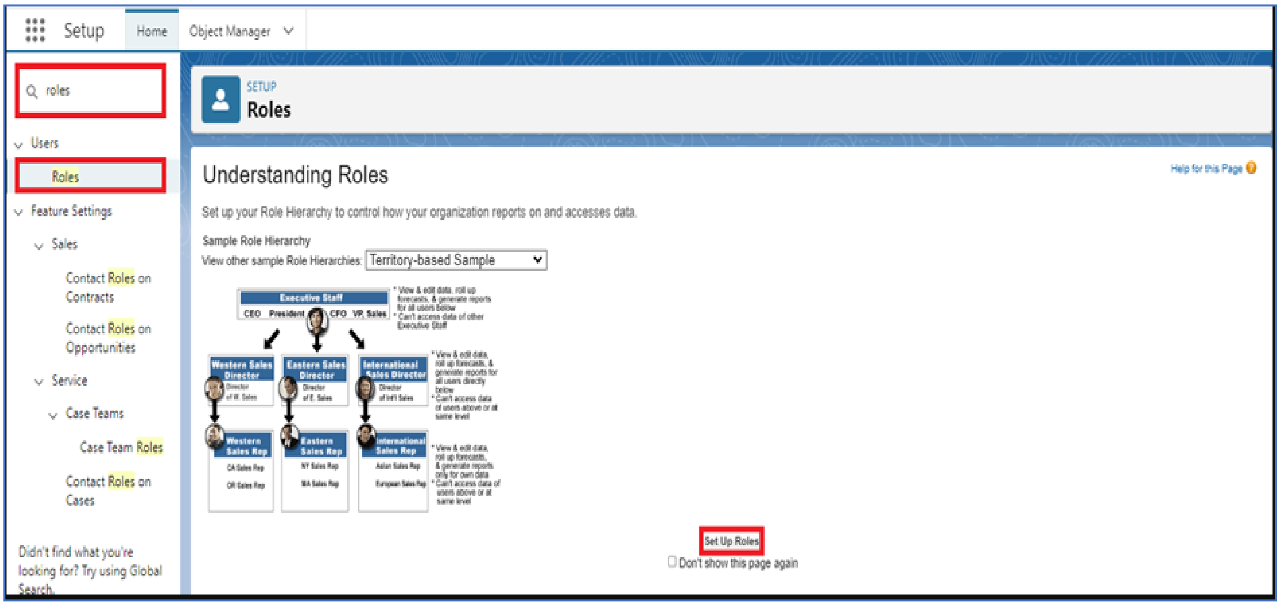
Create Employee Profiles for “On Site Employee”,”Remote Employee” as in Activity 2, but in step 3 only allow permission access for Project and Project Task objects only.

Milestone – 10

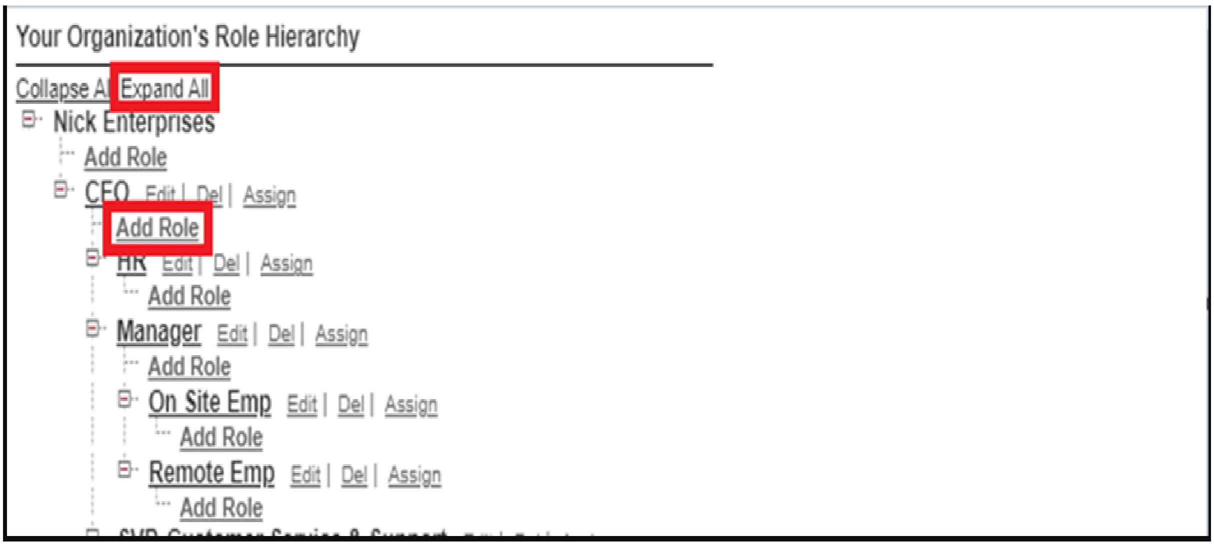
Role

Activity 1: Creating HR Role

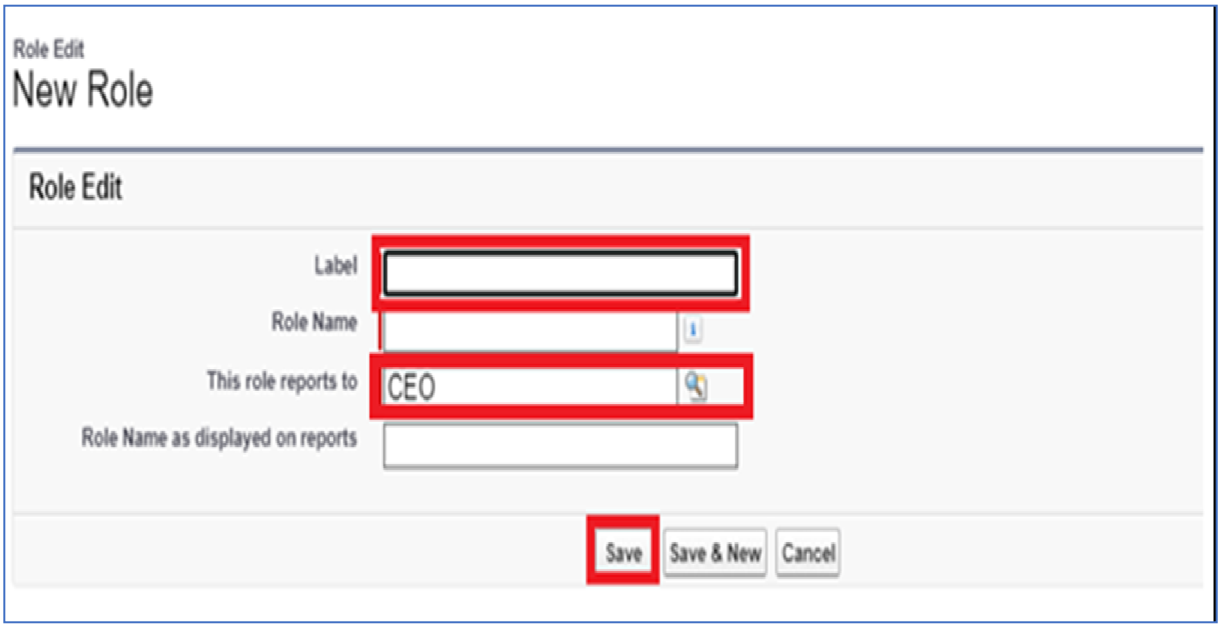
1. Go to quick find --> Search for Roles --> click on set up roles.



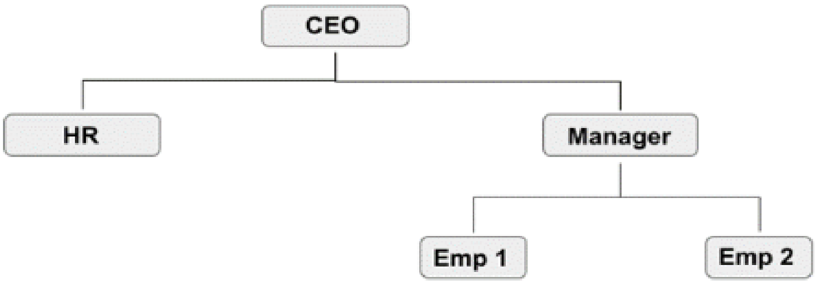
2. Click on Expand All and click on add role under whom this role works.



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.



Role Hierarchy: The above diagram represents which role reports to which one.

Activity 2: Creating more roles

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

Note: On Site Employee and Remote Employee reports to Manager.

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 "Manager" 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.

Next 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 "On Site Employee" 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.

Next 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 "Remote Employee" 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.

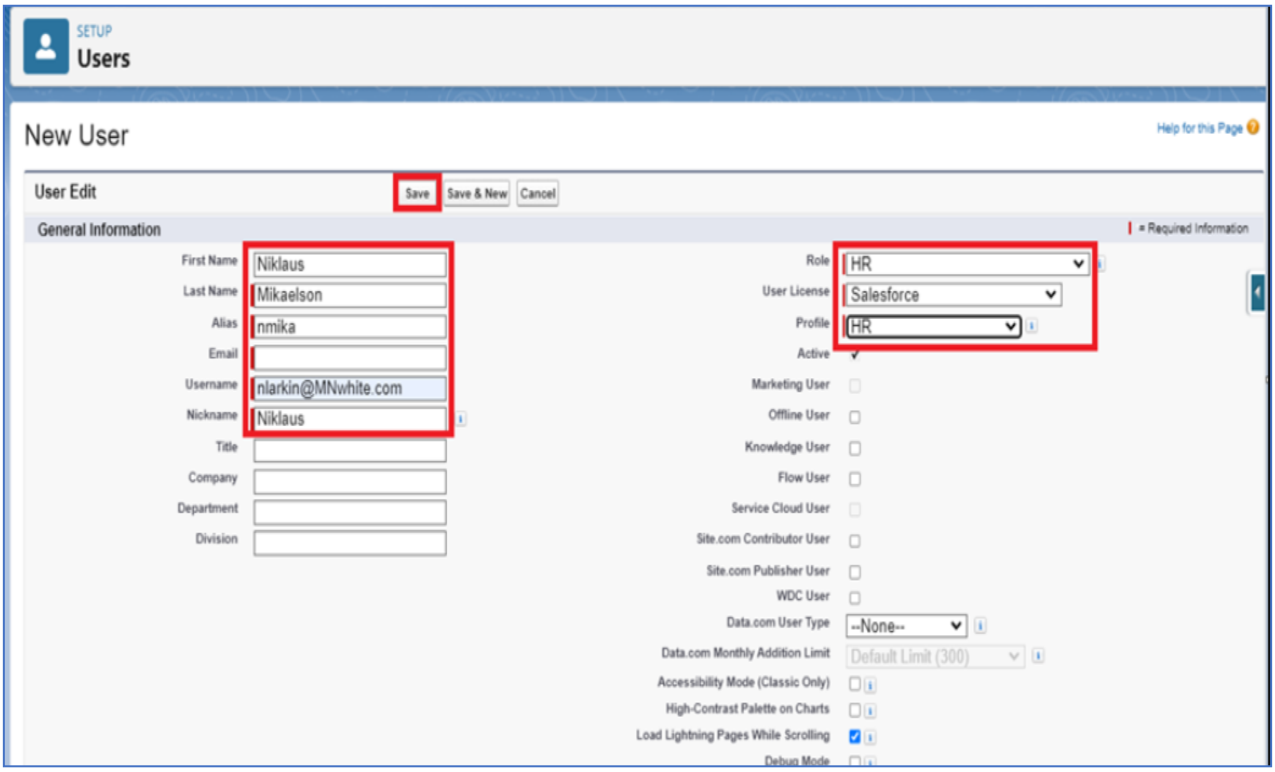
Milestone – 11

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.

1. Go to setup --> type users in quick find box --> select users --> click New user.

2. Fill in the fields

   1) First Name : Kole
   2) Last Name : nicklson
   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.

Next User

1. Go to setup --> type users in quick find box --> select users --> click New user.

2. Fill in the fields

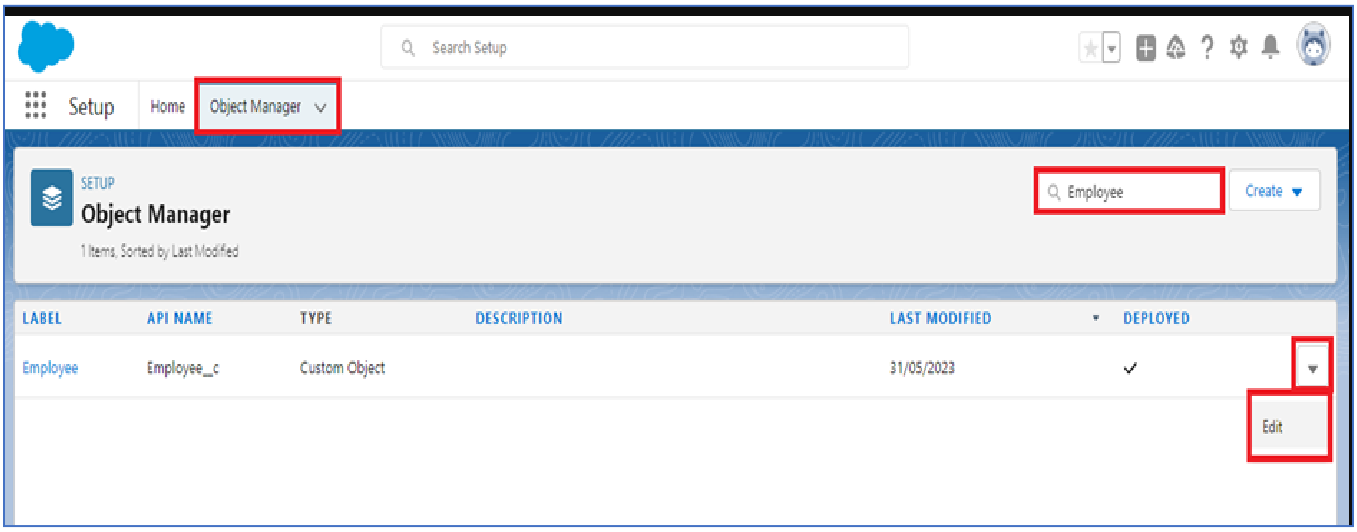
    1) First Name : lol
    2) Last Name : Rickelton
    3) Alias : Give a Alias Name
    4) Email id : Give your Personal Email id
    5) Username : Username should be in this form: text@text.text
    6) Nick Name : Give a Nickname
    7) Role : Manager
    8) User license : Salesforce Platform
    9) Profiles : Manager

3. Save.

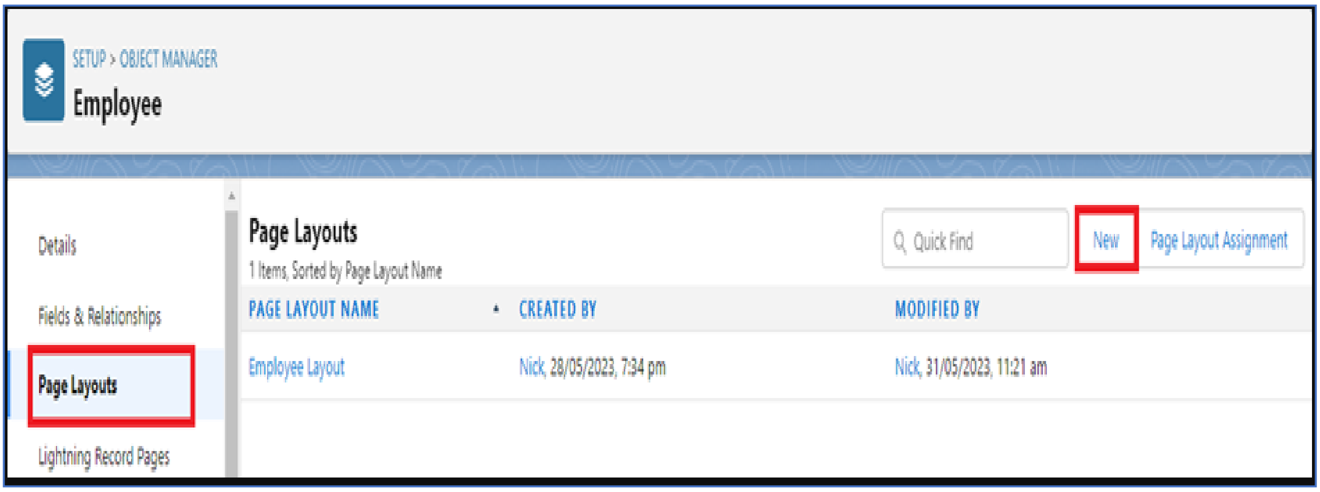
Milestone – 12
Page Layouts

Activity 1 : creating a page layout for Employee object
To Create a Page layout:

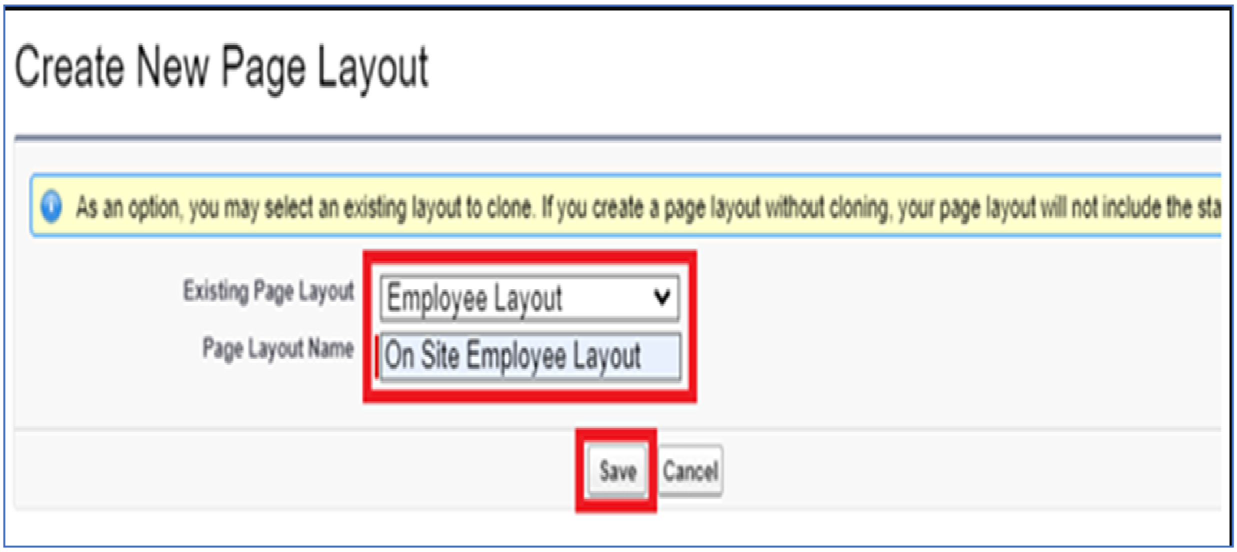
1. Go to Setup --> Click on Object Manager --> Search for the object (Employee) --> From drop down click on Edit.



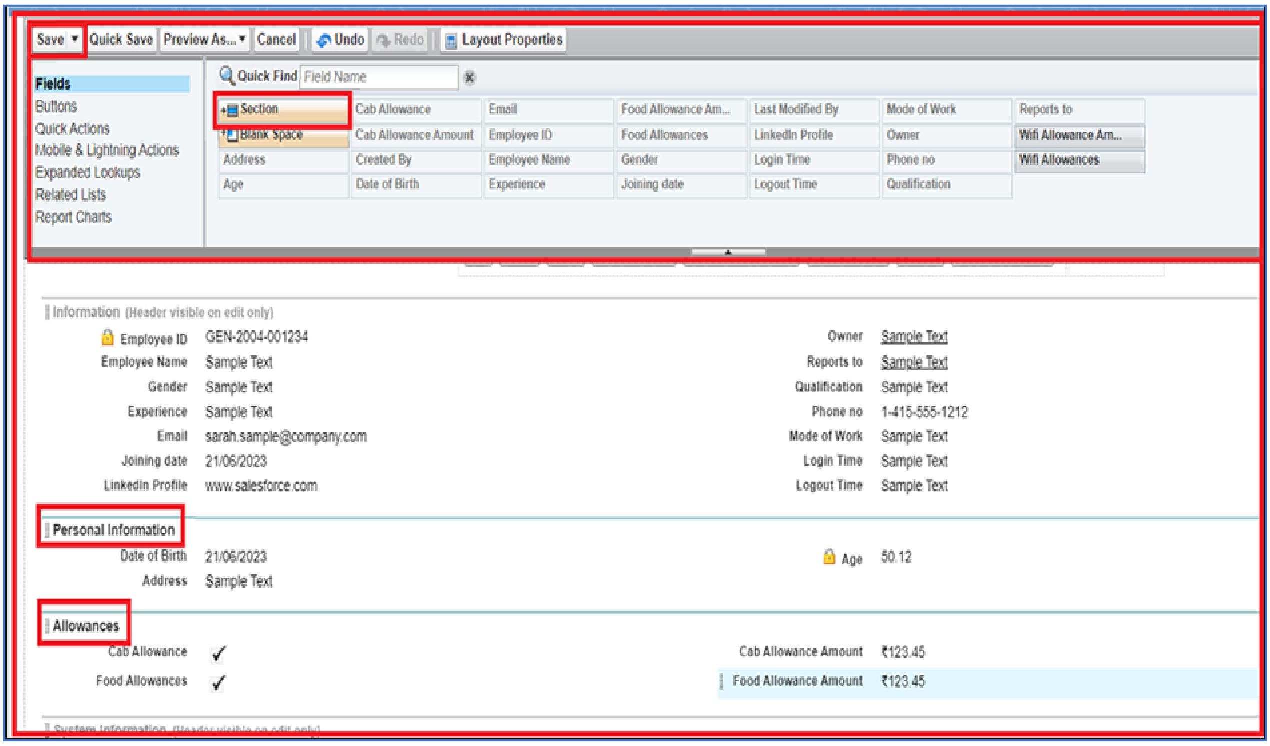
2. Click on Page layout --> Click on New.



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.

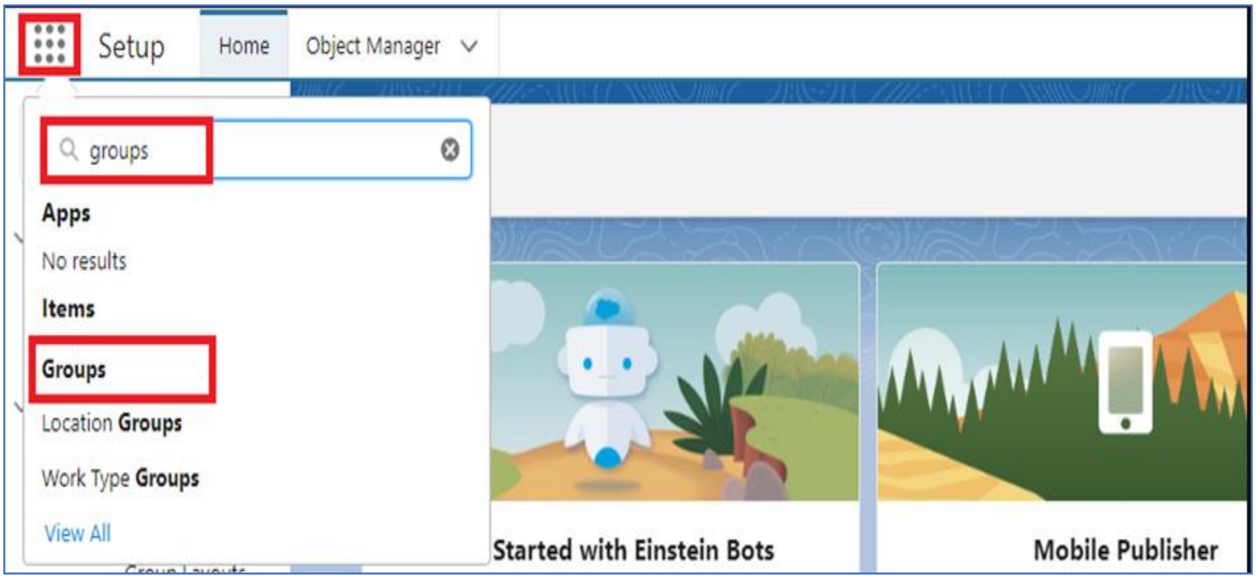
To Create a Page layout:

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 “Remote 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. Click Save.

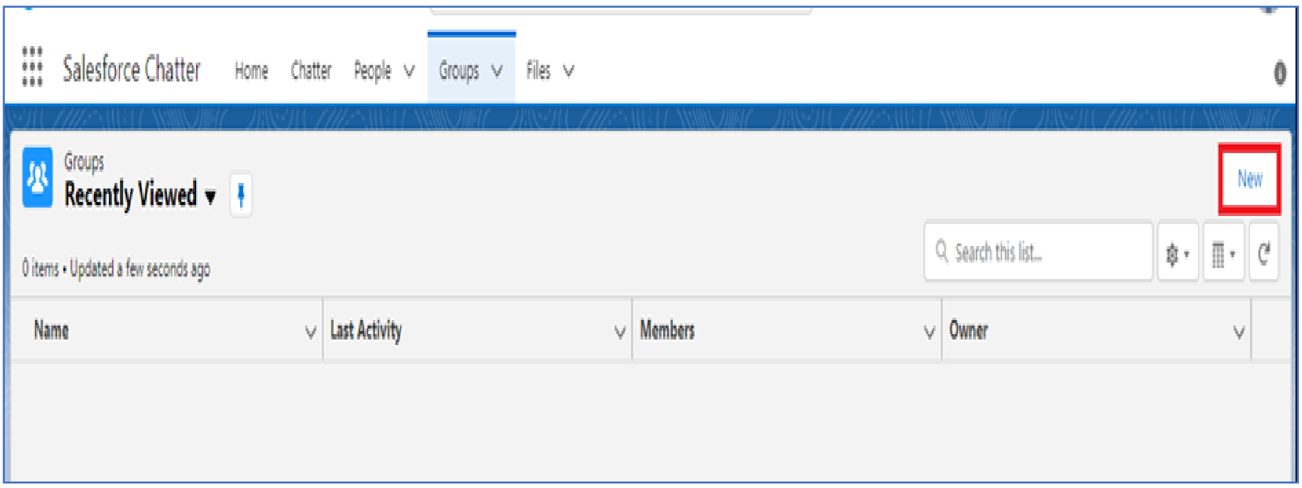
Milestone – 13
Chatter Group

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.

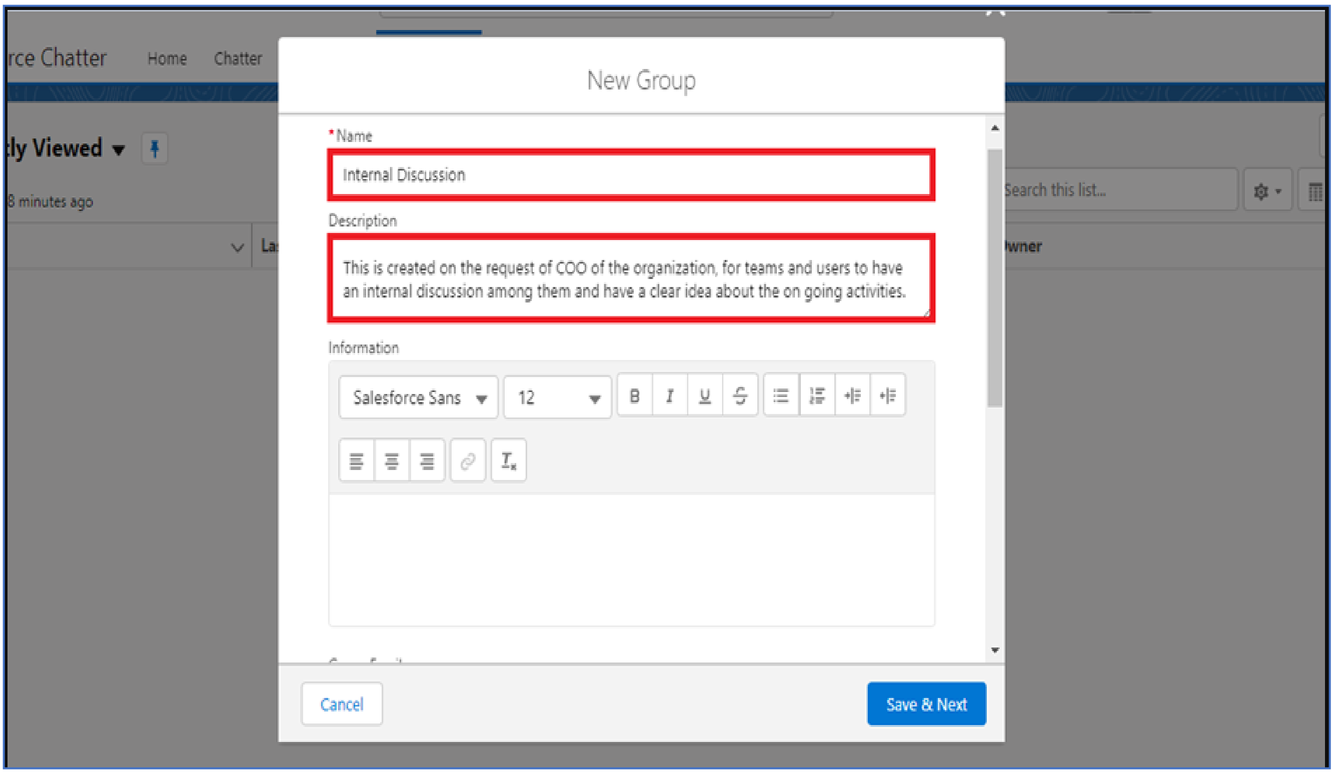


3. Click New.

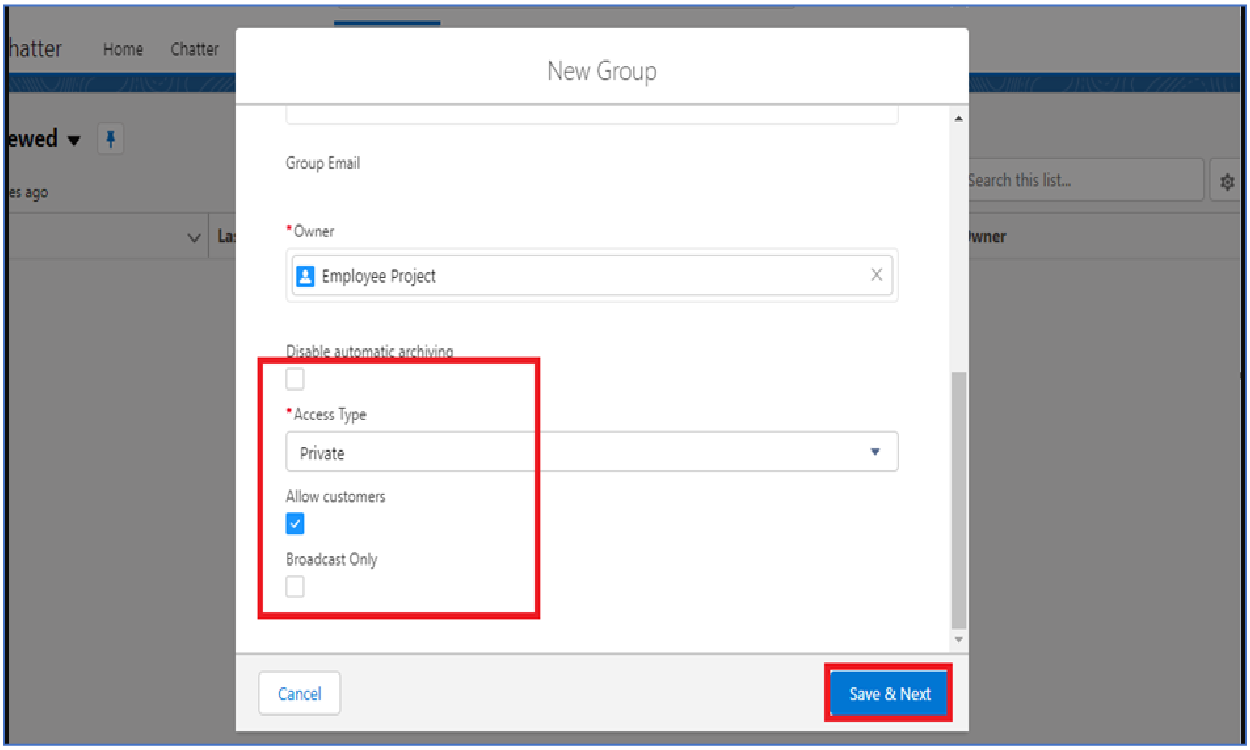


4. Fill in the new group information with these details:

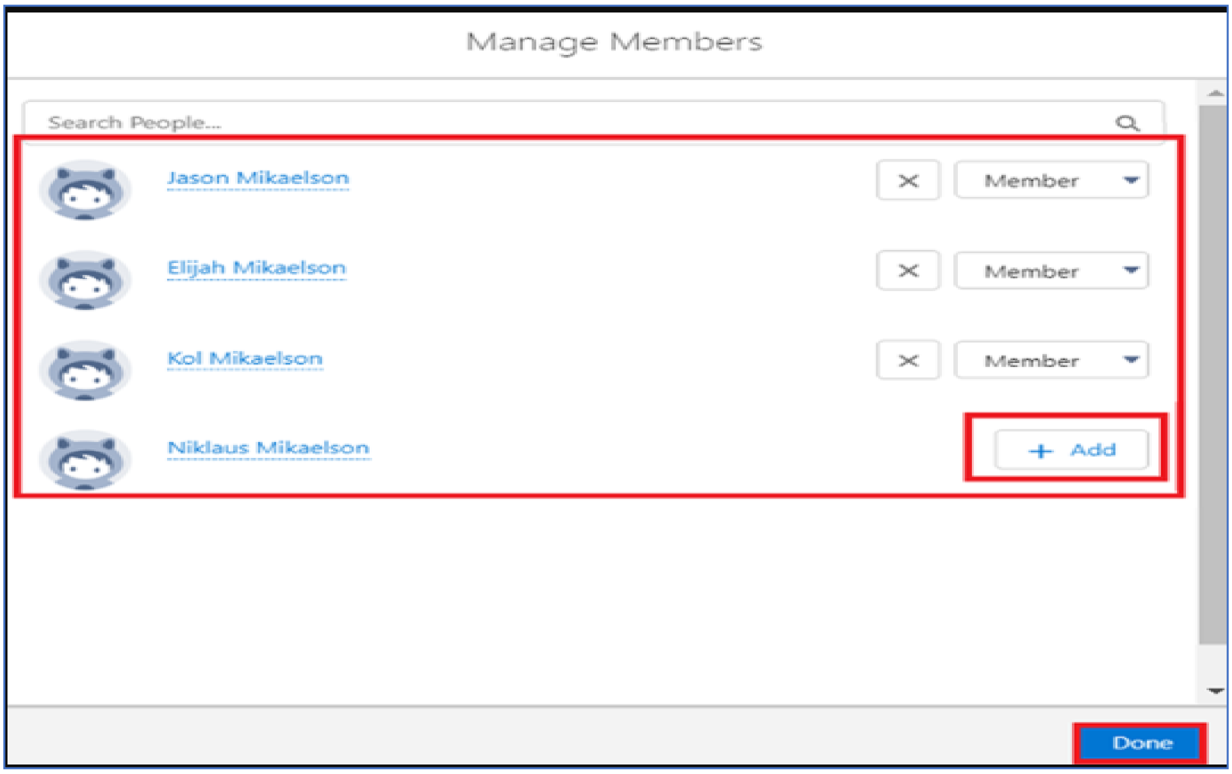
Field	Value
1. Group Name	Internal Discussion
2. Description	Give a understanding Description on your own
3. Access Type	Private
4. Allow Customers	Checked



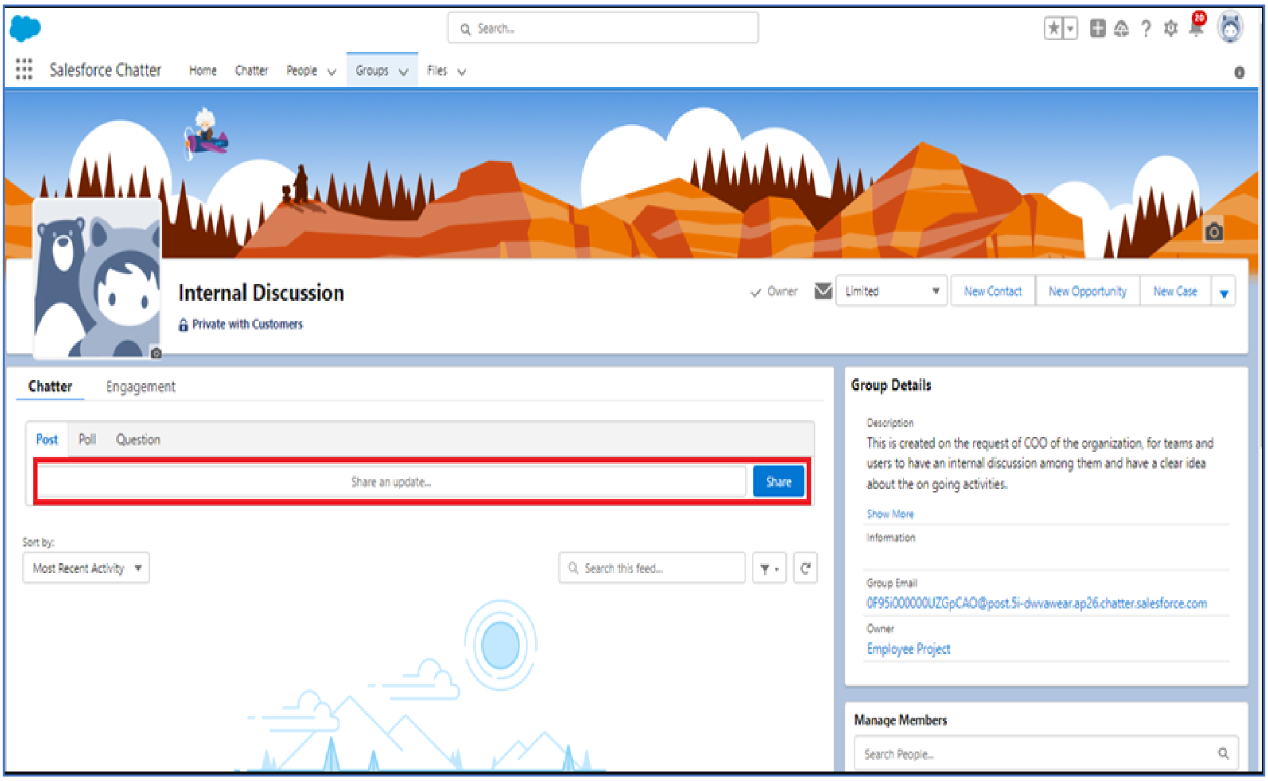
5. Click Save & Next. Skip the Upload Picture section and click Next.



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.

Note: You can like or comment on this post.

Note: there is a default chatter group in the org with all the active users in it, this activity is to show you how to create a chatter group and add users into it.

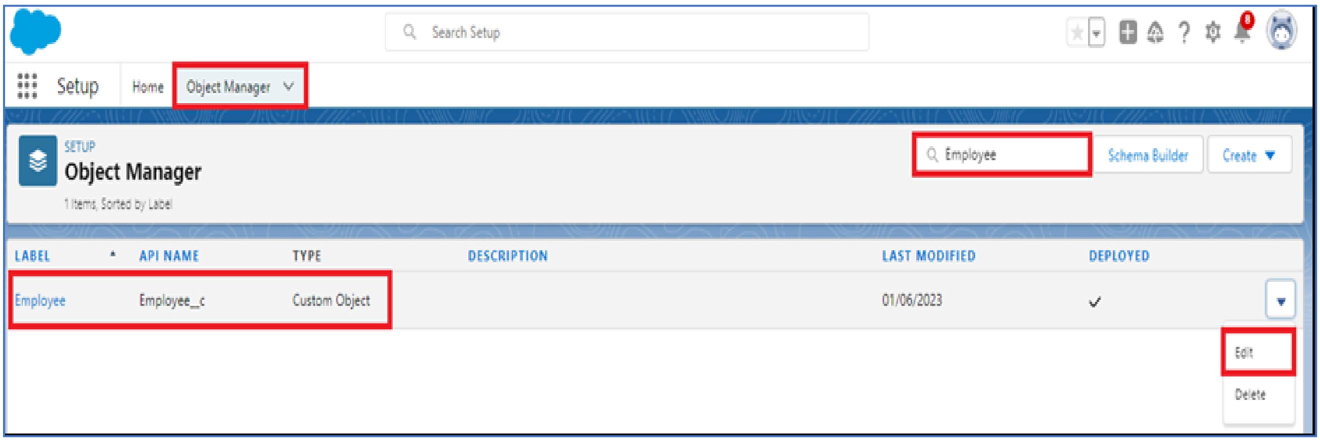
Milestone – 14

Record Types

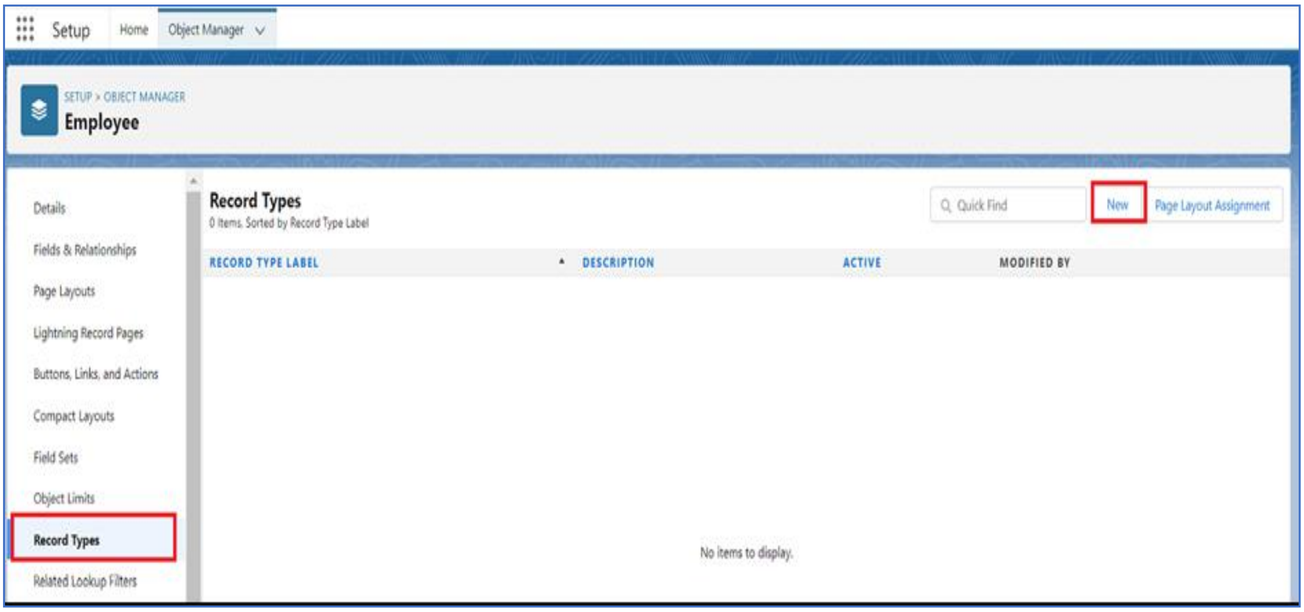
Activity 1: Creating On Site Employee Record Type

To create a Record Type:

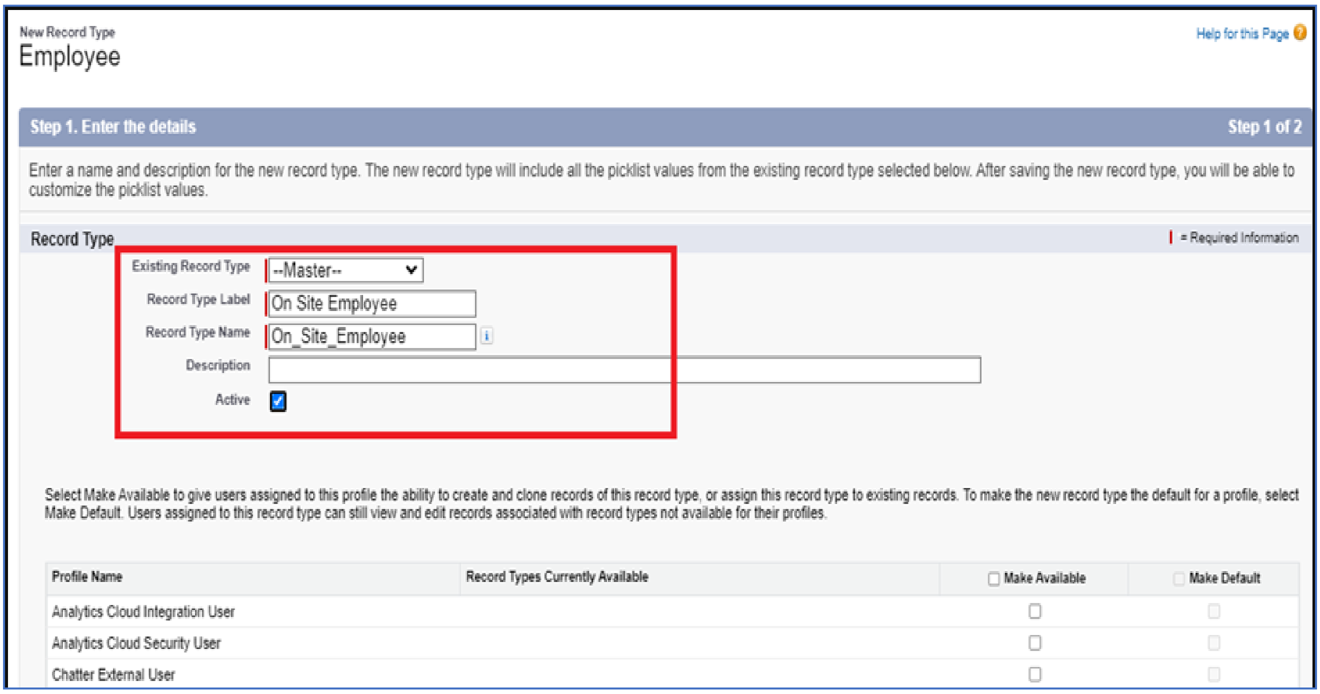
1. Go to Setup --> click on Object Manager --> Search for the object (Employee) --> from drop down click Edit.



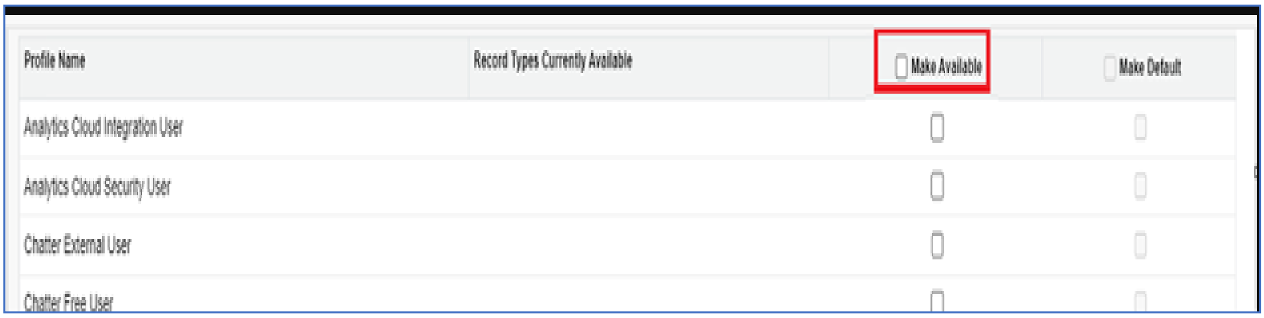
2. From the left panel click Record Types --> New.



3. Give Record Type Label as “On Site Employee” and make it active.

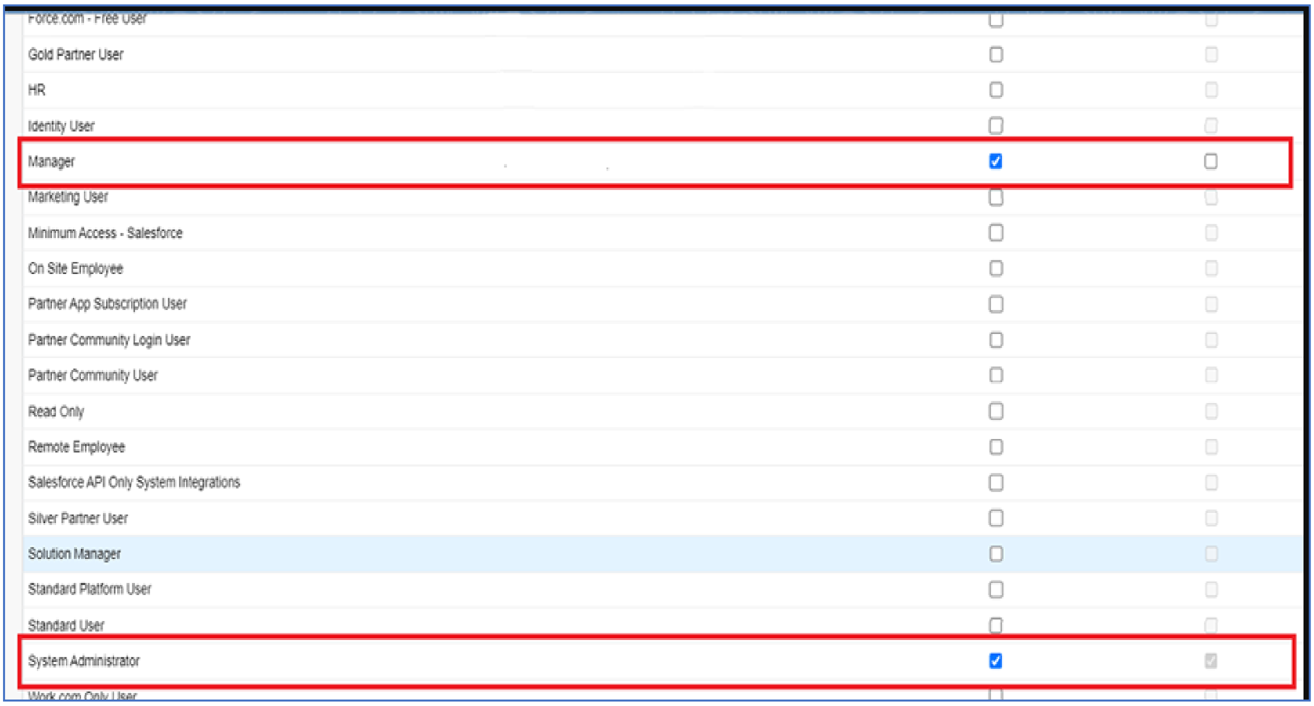


4. Uncheck for “Make Available”.

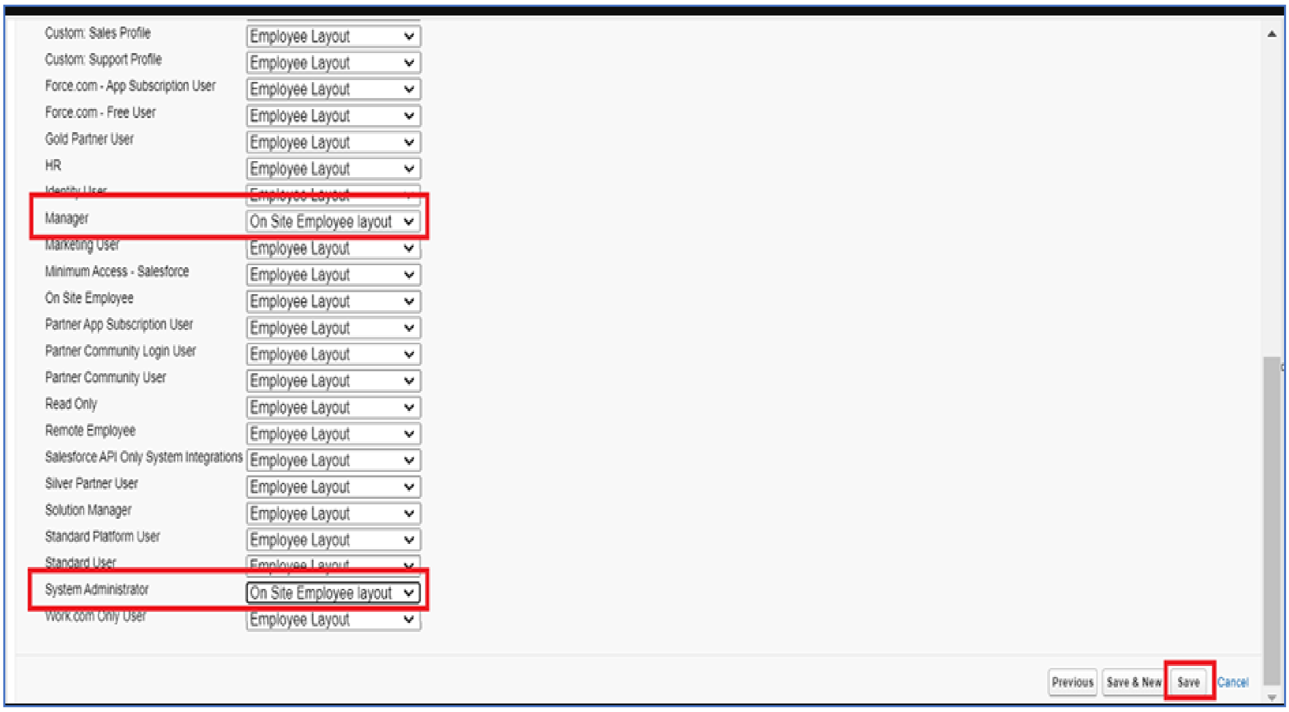


.

5. Scroll down and check for the Manager & System Administrator profile and click 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

Create another Record Type with name “Remote Employee” following the step from activity 1.

Note: use Remote Employee page layout for Remote Employee record type.

To create a 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 “Remote 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.

Workforce Administration Solution

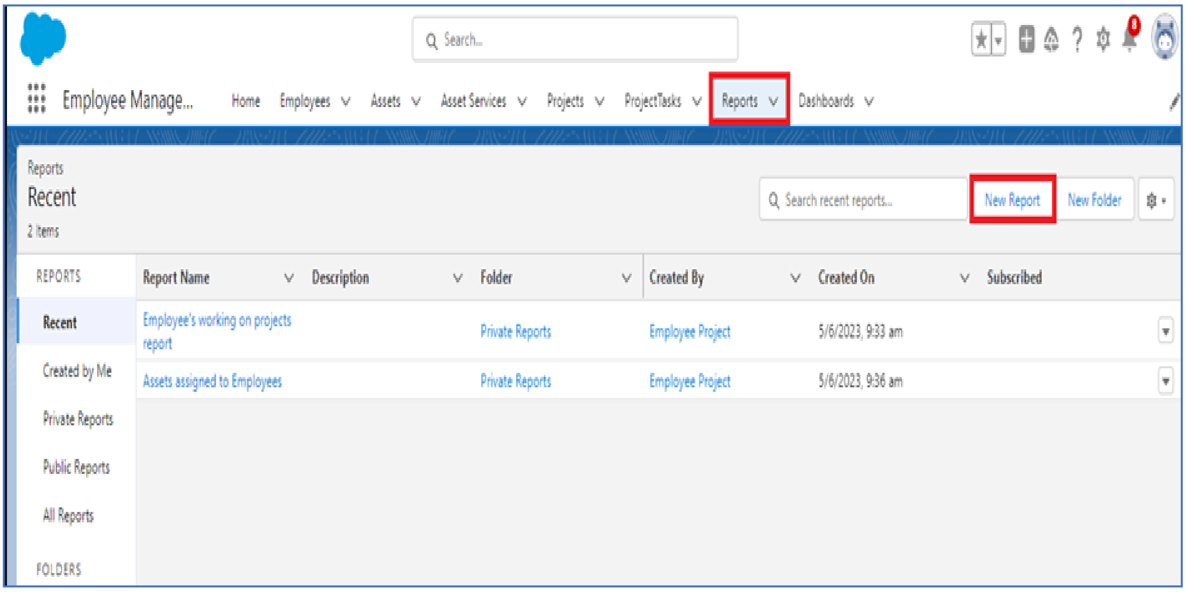
Milestone – 15

Permission Sets

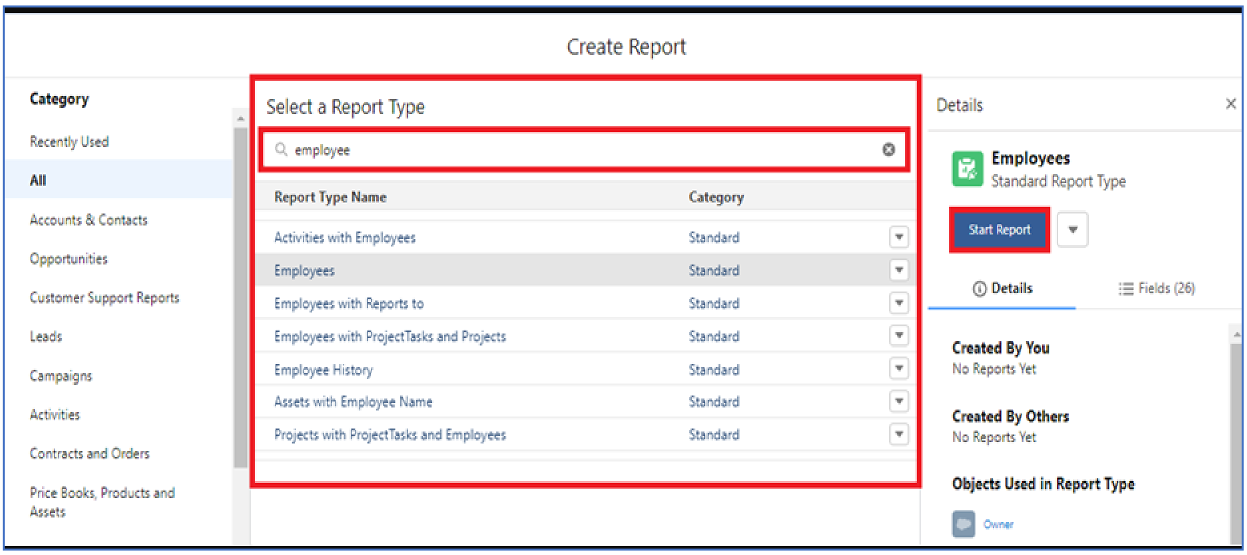
Activity 1: Create Report

To Create a Report:

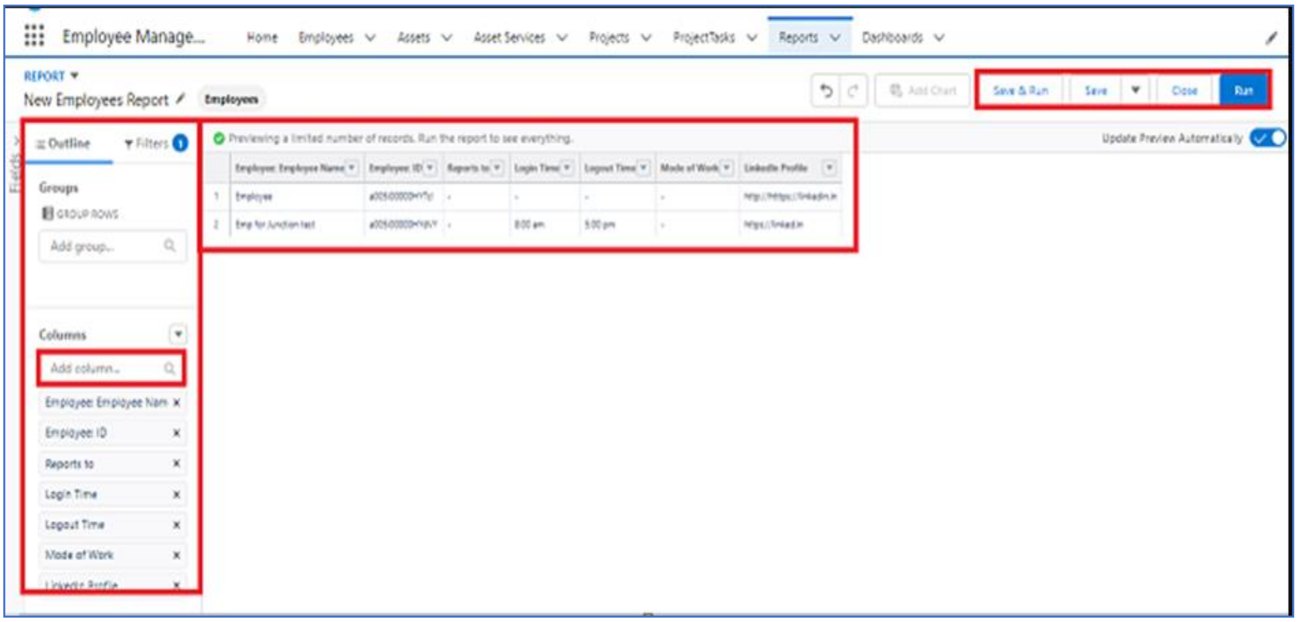
1. Go to the app --> click on the reports tab
2. Click New Report.



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.

Note: Reports may get varied from the above pictures as the data might be different.

Activity 2: Create 2 more Report

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

To Create a 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.

Note: Reports may get varied from the above pictures as the data might be different.

Report type name “Employees with project tasks”.

Next Report

To Create a 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.

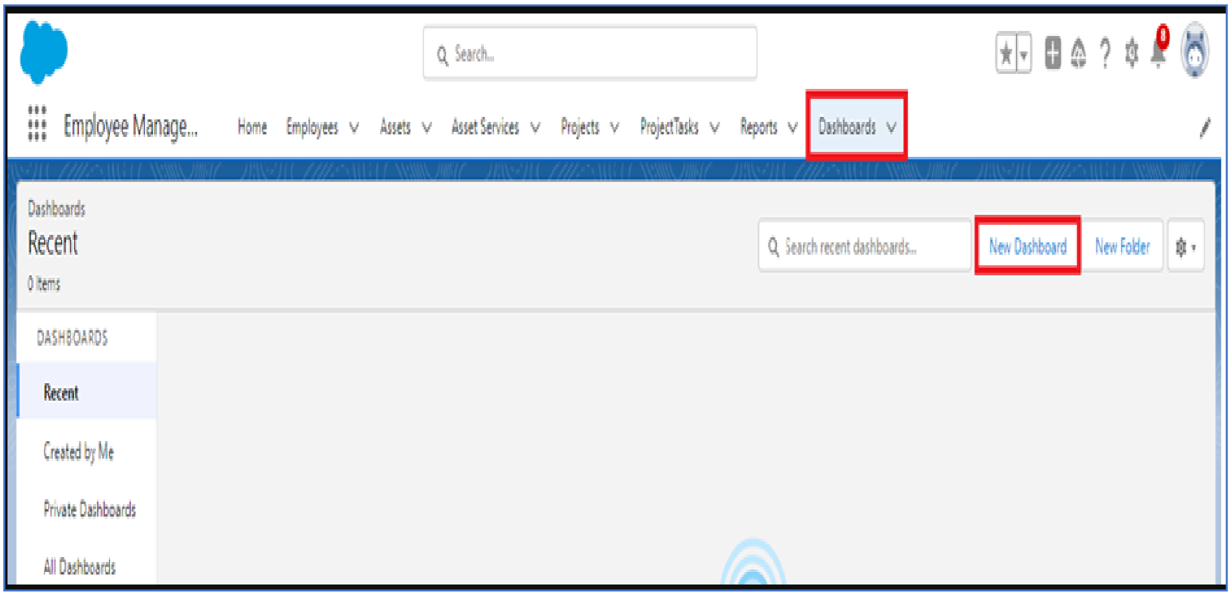
Note: Reports may get varied from the above pictures as the data might be different.

Report Type Name “Employees with Assets”.

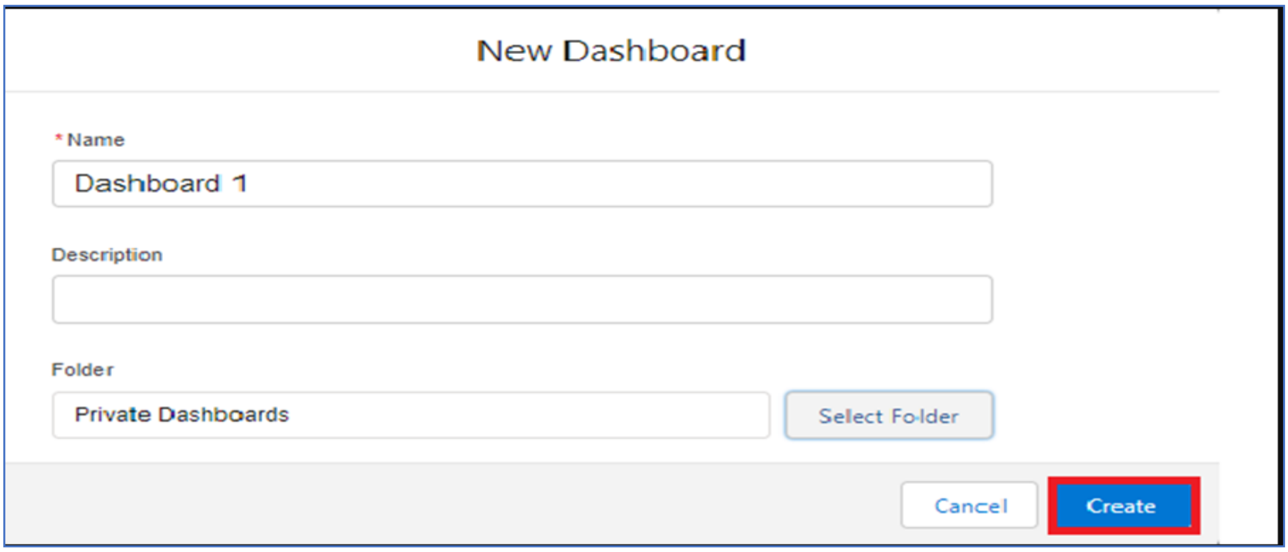
Milestone – 16
Dashboards

Activity 1: Create Dashboard
To Create a Dashboard

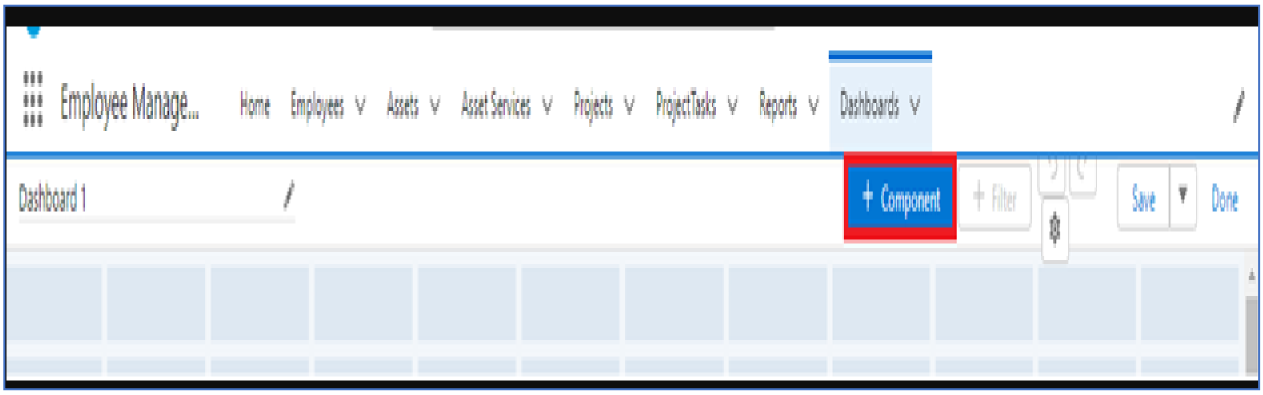
1. Go to the app --> click on the Dashboards tabs.



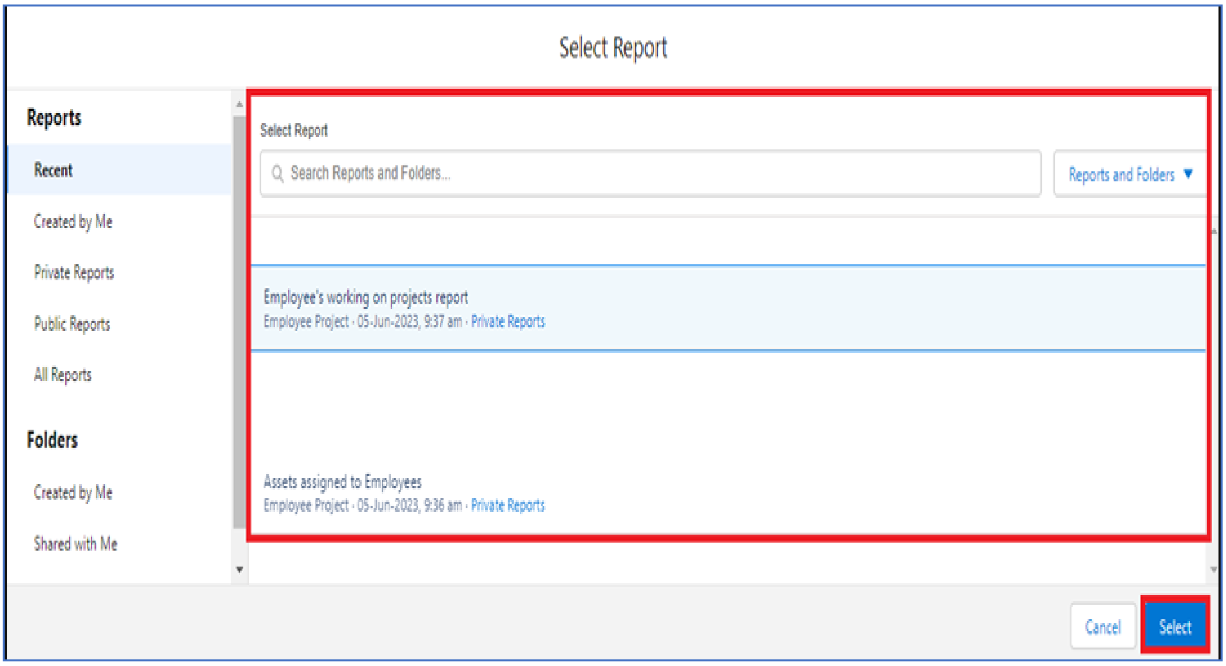
a. Give a Name and click on create



b. Select add component.



c. Select a Report and click on select.



d. Click Add then click on Save and then click on Done.

Activity 2:

Create another Dashboard as we discussed in activity 1.

To Create a Dashboard 2

1. Go to the app --> click on the Dashboards tabs.
   a. Give a Name and click on create
   b. Select add component.
   c. Select a Report and click on select.
   d. Click Add then click on Save and then click on Done.

Milestone – 17

Approval Process

Activity 1

Prerequisites:

Create the leave object with the following fields.

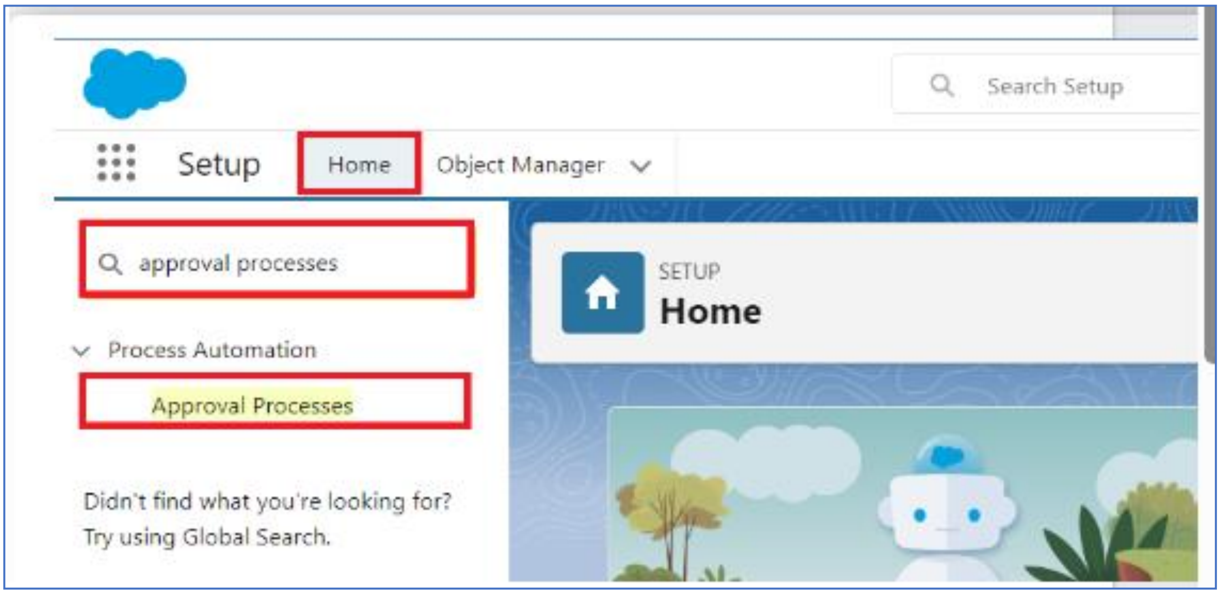
Object	Fields	Datatype
Leave	Employee Name No. of Days Subject Description Status	Lookup with Employee object Number Text Text Area(Rich) Picklist: values as follows Submitted Approved Rejected Note: Make sure the Status field is read only for everyone. (Give read only permission in step 3 while creating the field)

Create the tab for the leave object.

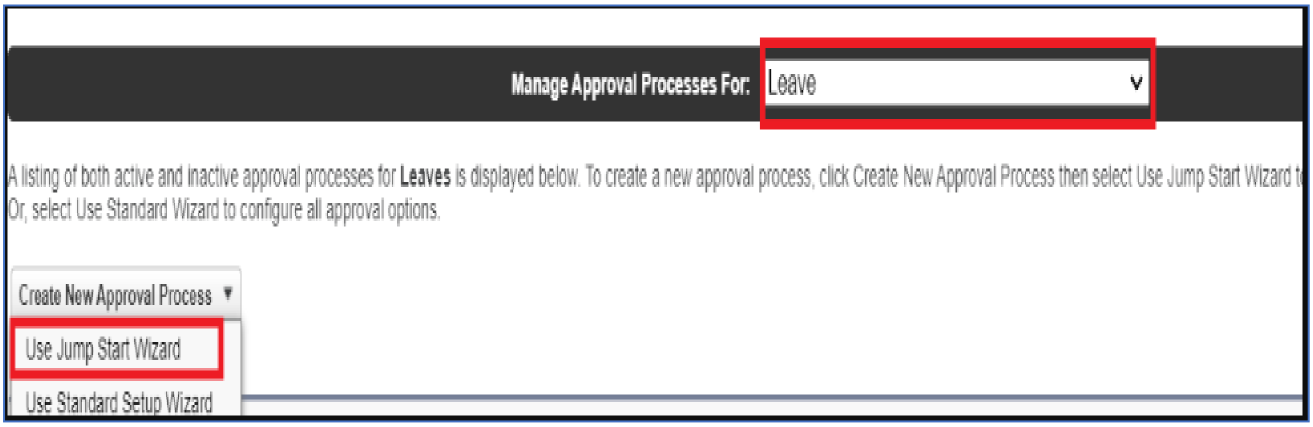
Activity 2

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

Parameter	Value
Name	Leave Approval Request
Unique Name	Leave_Approval_Request(This automatically gets sent when you tab out of the Name field)

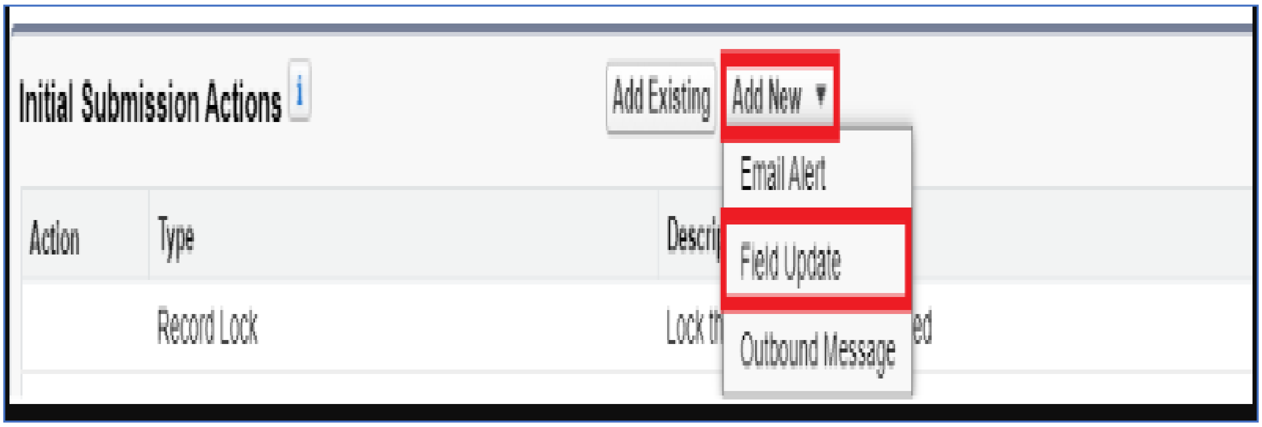
Approval Assignment Email Template	Leave blank
Add the Submit for Approval button and Approval History related list to all Travel Approval page layouts	Leave this selected/checked
Use Approver Field of Leave Owner	Leave unselected/unchecked.
Select Approver	select Automatically assign to approver(s) and for users select the name of the user with the Manager role.

5. Click Save.
6. Click View Approval Process Detail Page.

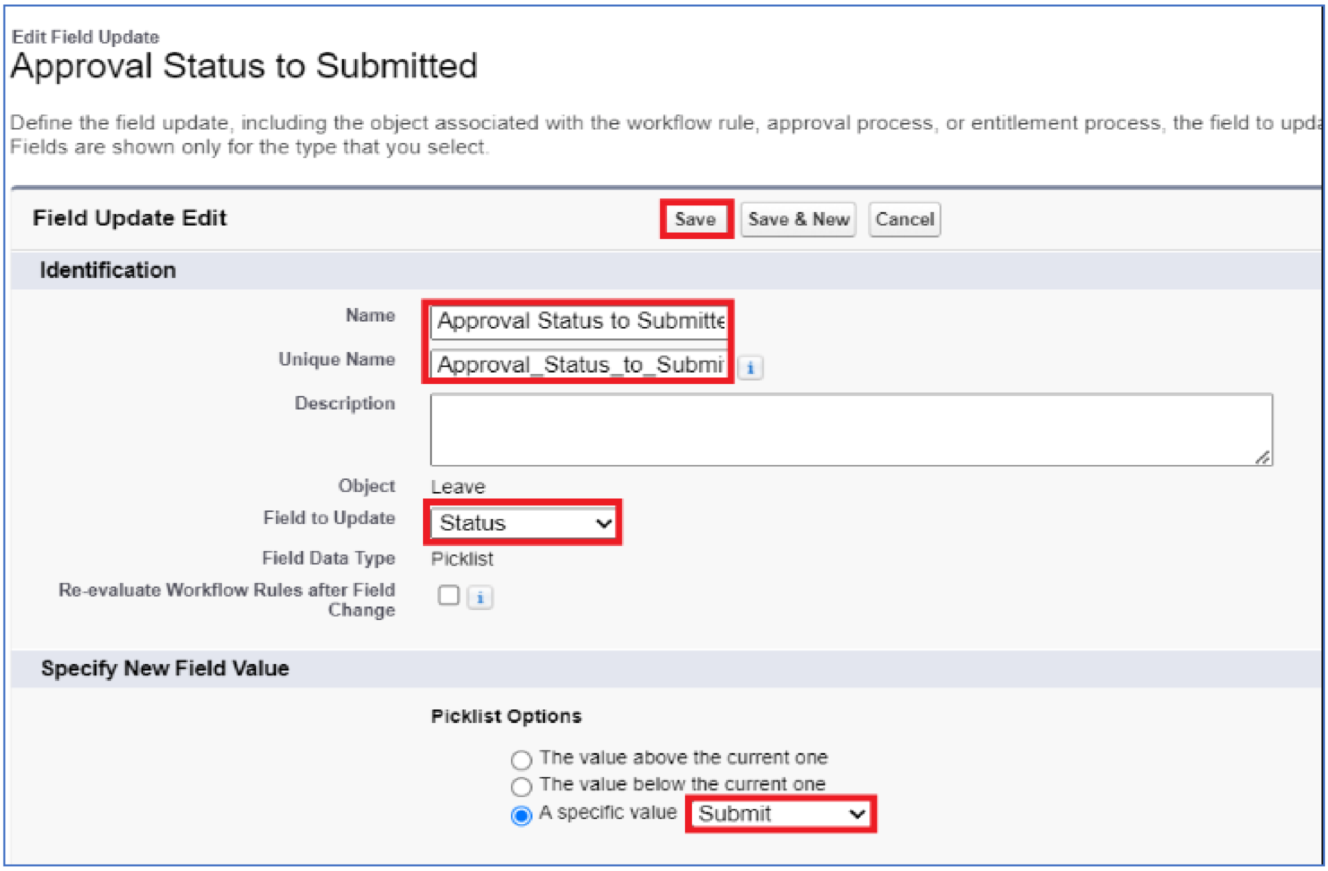
Activity 3

Initial Submission Action:

1. Under initial submission action click on add new and then select field update.



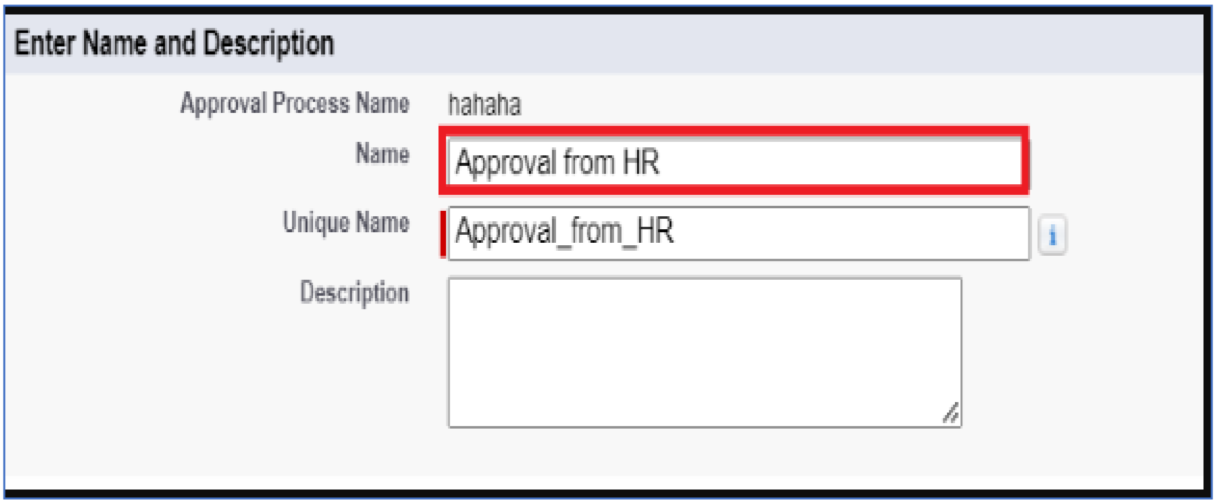
2. Give name as "Approval Status to Submitted".
   Select Status for the field to update.
   Under specify new field value select "A specific value" and select submitted and click Save.



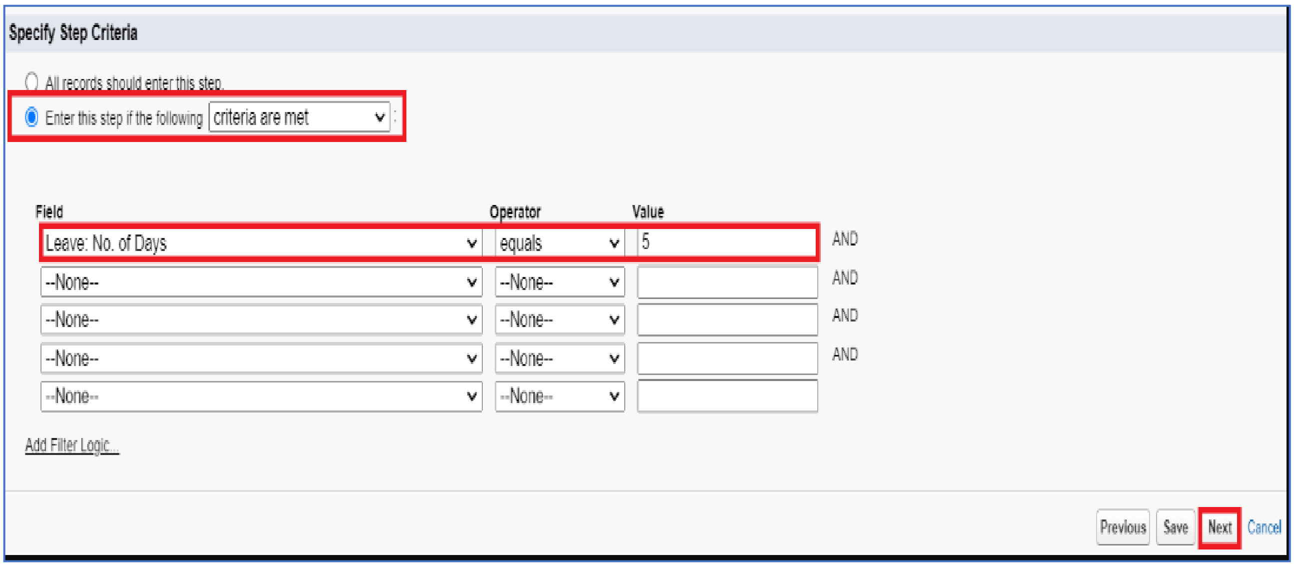
Activity 4

Approval Steps:

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



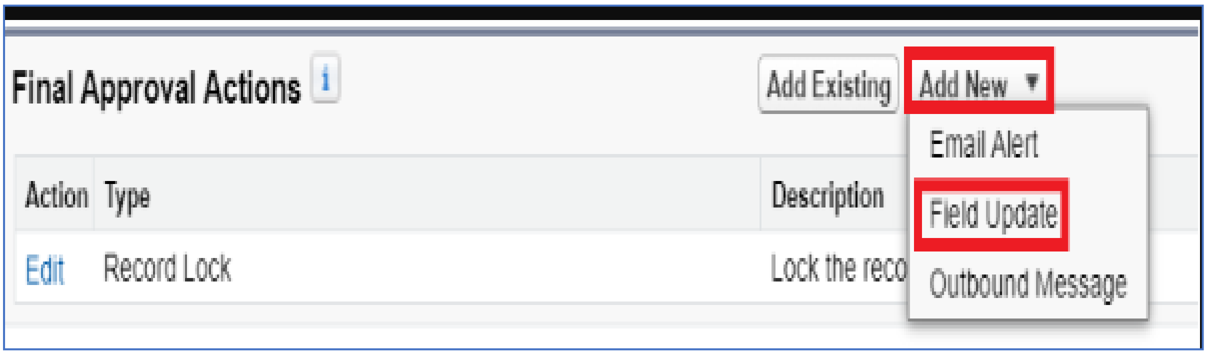
4. Click next.
5. Under select approver : select Automatically assign to approver(s) and for users select the name of the user with the HR role.

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.

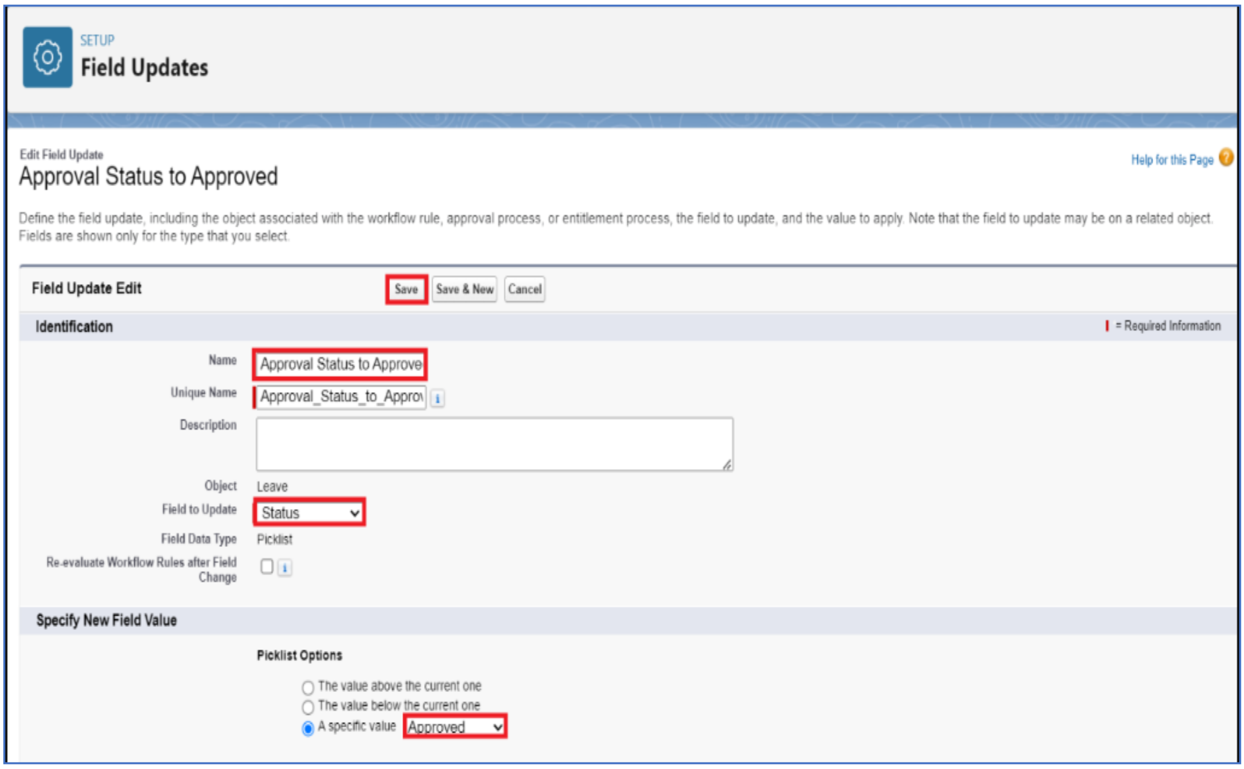
Activity 5

Final Approval Action:

a. Under initial submission action click on add new and then select field update.



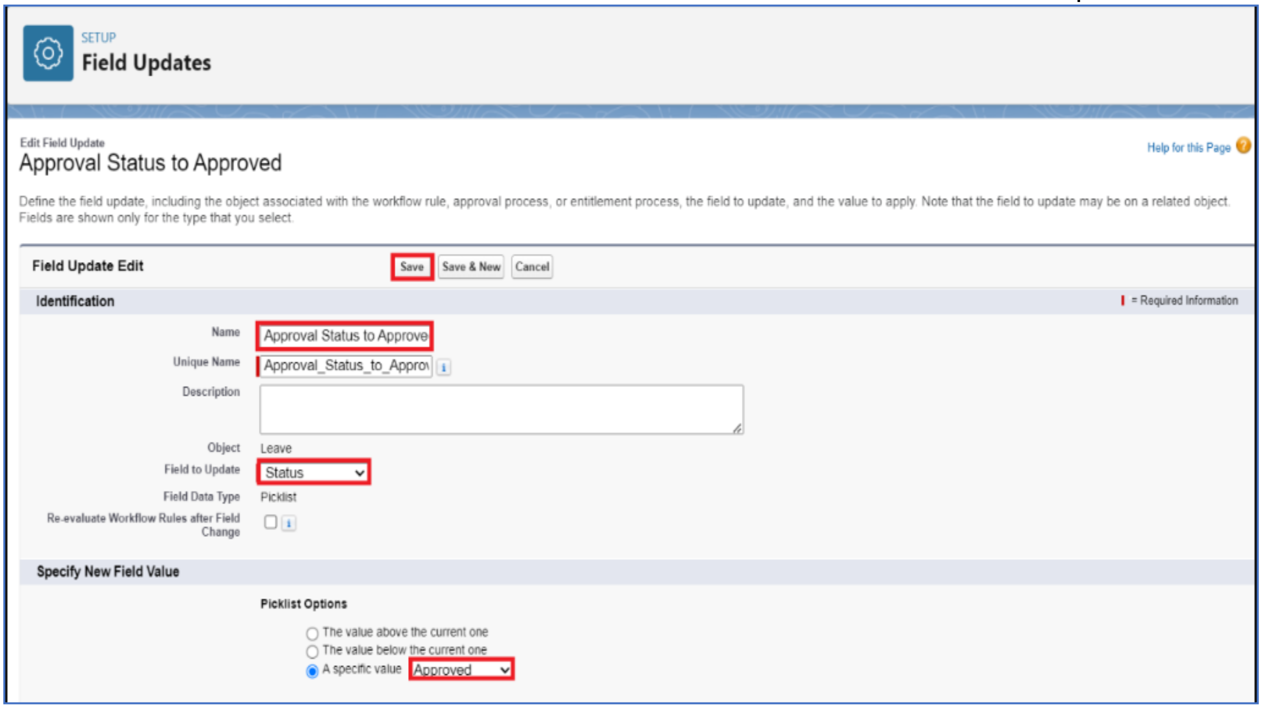
b. Give name as "Approval Status to Approved".
Select Status for the field to update.
Under specify new field value select "A specific value" and select Approved and click Save.



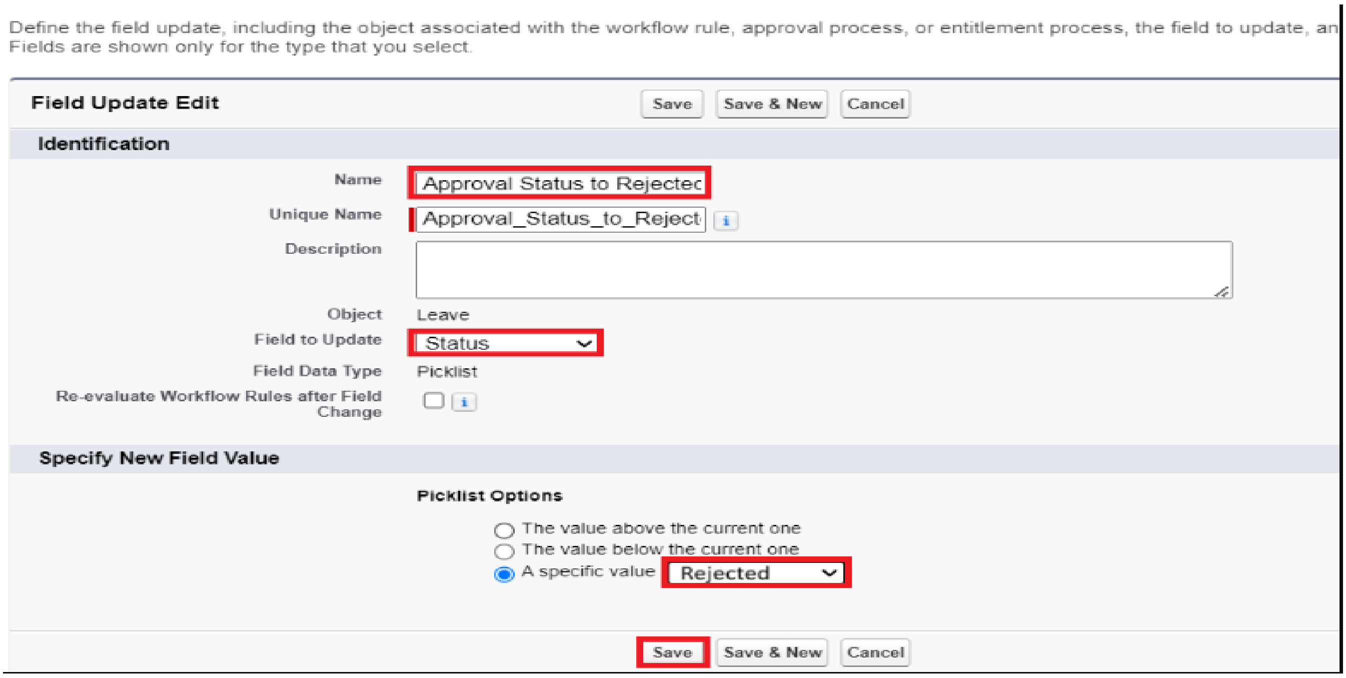
Activity 6

Final Rejection Action:

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.

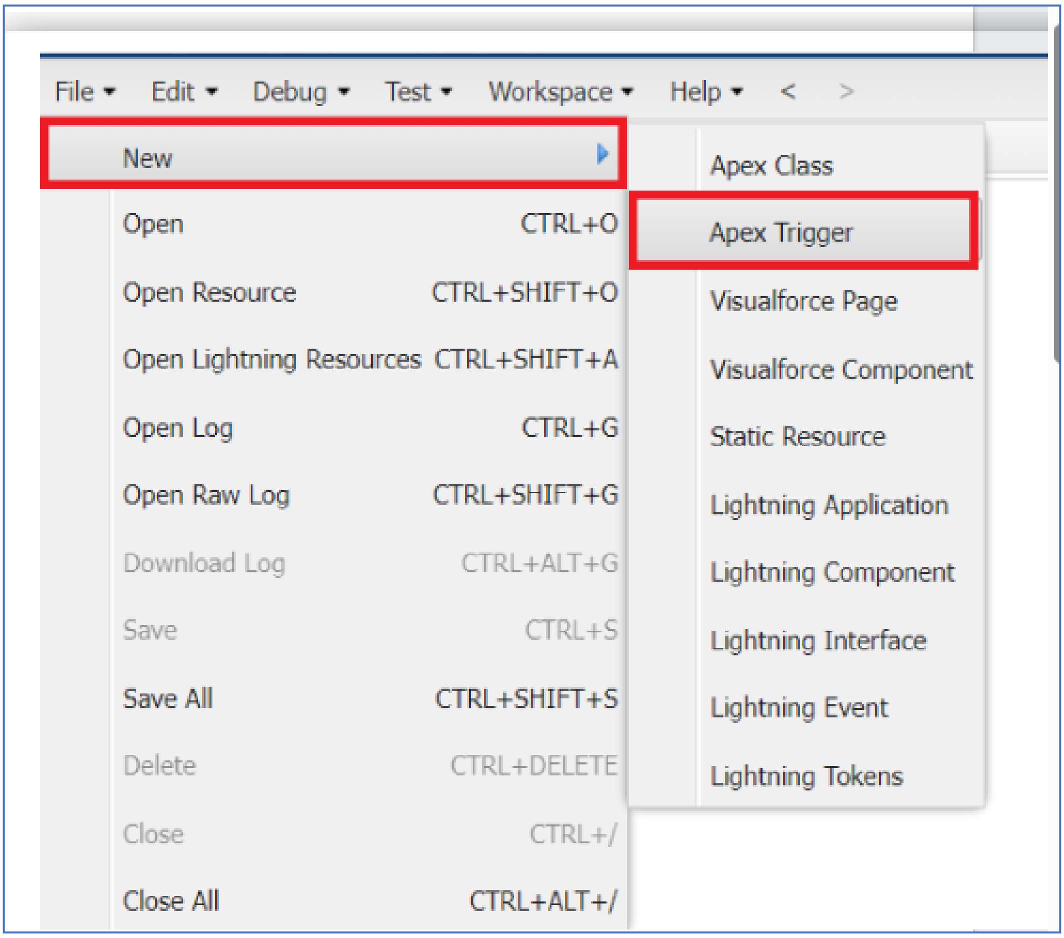


Milestone – 18
Apex Trigger

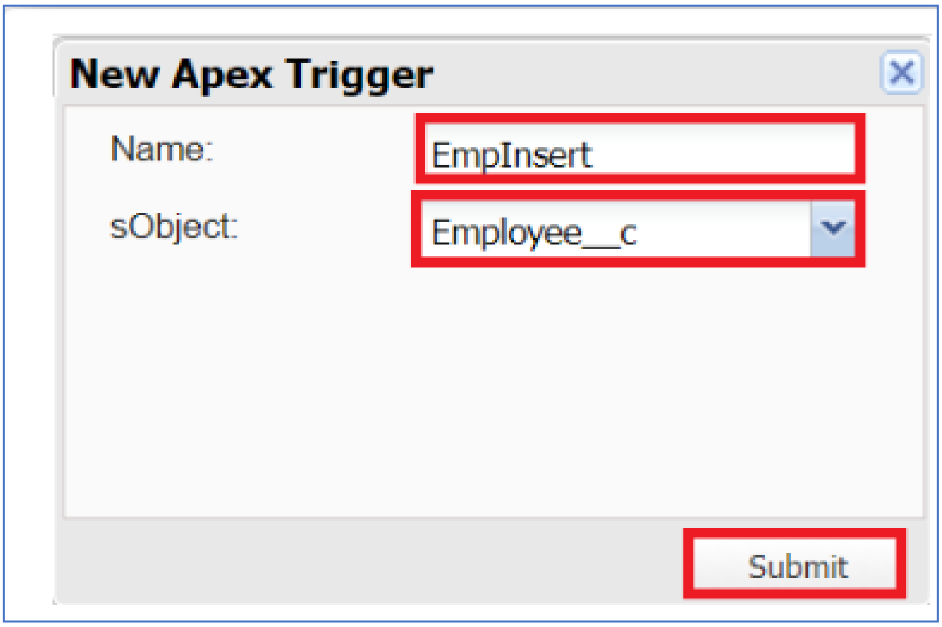
Activity 1 : Create an Apex Trigger

Create an Apex Trigger

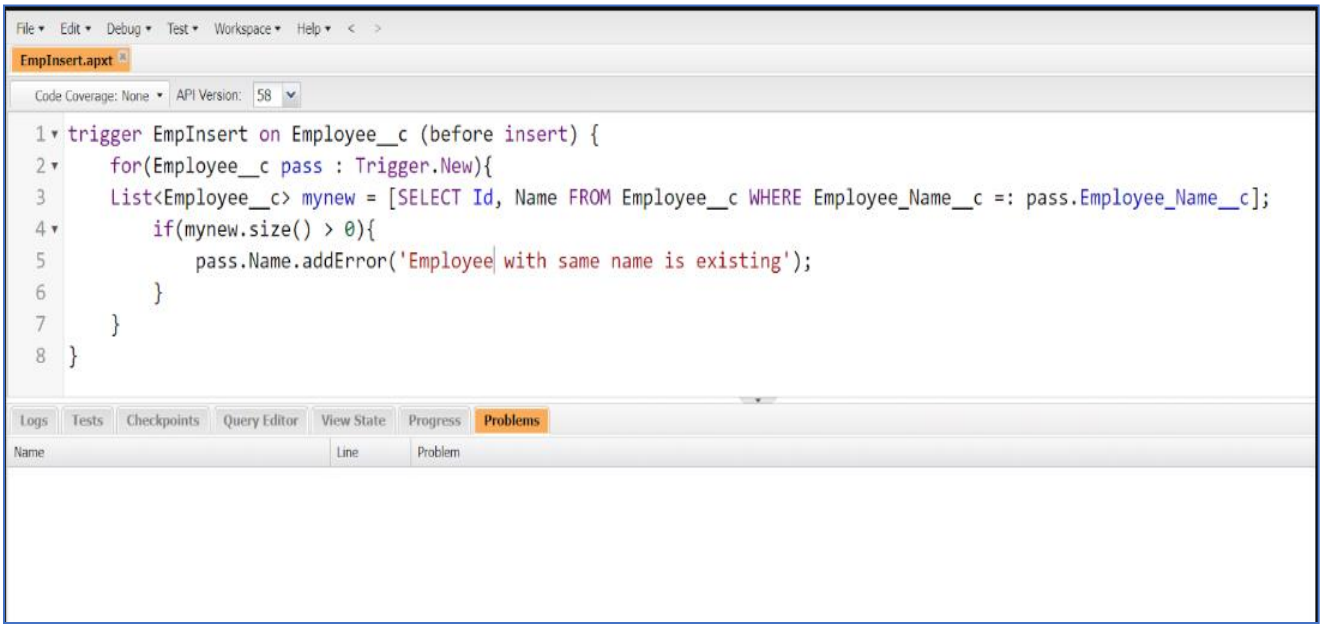
1. To create a new Apex Class follow the below steps:
   Click on the file --> New --> Apex Class.



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:

```
trigger EmpInsert on Employee__c (before insert) {
    for(Employee__c pass : Trigger.New){
    List<Employee__c> mynew = [SELECT Id, Name FROM Employee__c WHERE
 Employee_Name__c =: pass.Employee_Name__c];
        if(mynew.size() > 0){
```

```
            pass.Name.addError('Employee with same name is existing');
            }
    }
}
```

2. 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".