

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

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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

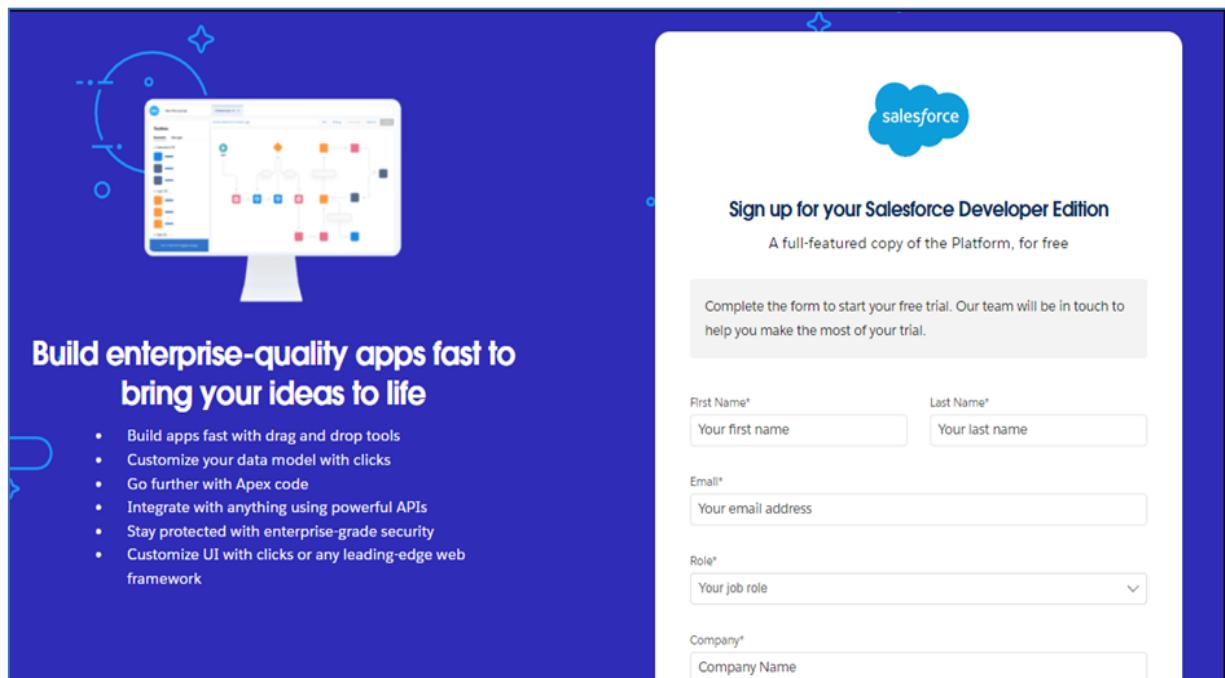
Let's begin with creating our Salesforce Developer Account

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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 :

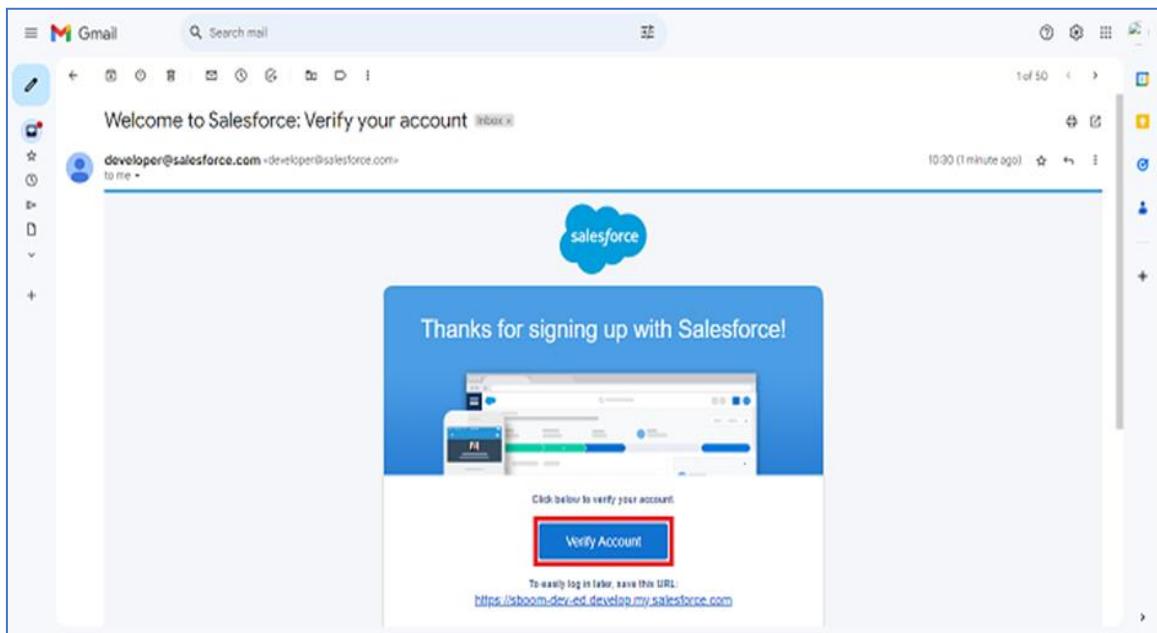
username@organization.com

Click on sign me up after filling these.

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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.

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Change Your Password

Enter a new password for lead@sb.oom.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
* In what city were you born?

* Answer
asdgfghijkl

Change Password

4. Then you will redirect to your salesforce setup page.

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

SETUP Home

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

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Milestone - 2

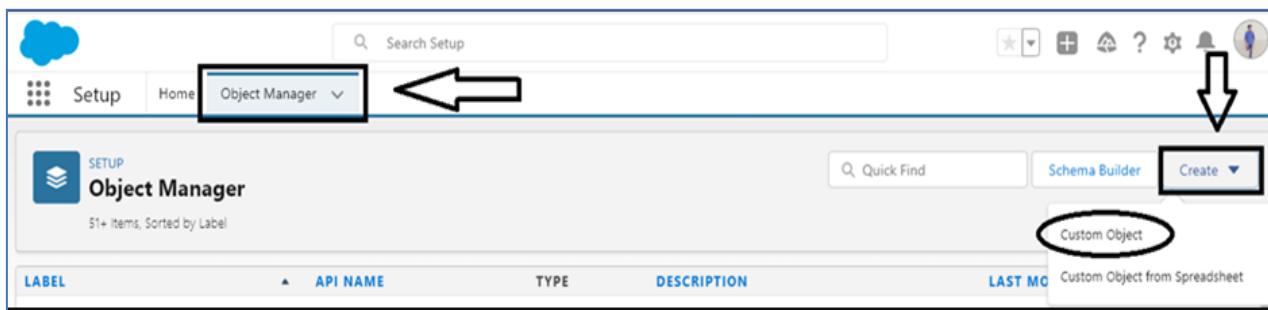
Object

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

A screenshot of the 'New Custom Object' creation page. The page has a header 'New Custom Object'. Below it, there is a section titled 'Custom Object Information' with fields for 'Label' and 'Plural Label', both of which are highlighted with red boxes. There is also a 'Description' field. At the bottom of the page, there are several links and buttons, including 'Save', 'Save & New', 'Cancel', and help links for 'Open the standard Salesforce.com Help & Training website' and 'Open a window using a Visualforce page'.

- 3) Enter Record Name Label and Format

1. Record Name : Employee ID

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2.Data Type : Auto Number

3.Display Format : EMS-{0000}

4.Starting Number : 1

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Record Name". The Record Name field is always called "Name" when referenced via the API.

Record Name	<input type="text" value="Employee Id"/>	Example: Account Name
Data Type	<input type="text" value="Auto Number"/>	
Display Format	<input type="text" value="EMS-{0000}"/>	Example: A-{0000} What Is This?
Starting Number	<input type="text" value="1"/>	

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

Optional Features

Allow Reports 

Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing [What Is This?](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed [What Is This?](#)

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

Allow Search 

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object







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.

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- 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

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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

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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)

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

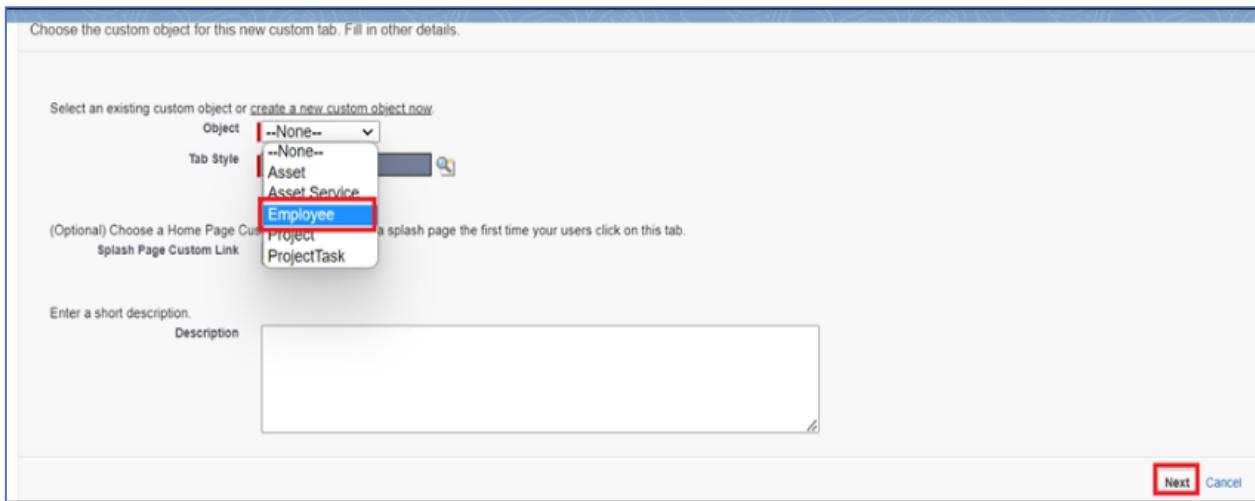
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external content. Lightning Component tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation bar. You can also use Lightning Components to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs	New	What Is This?
No Custom Object Tabs have been defined		

Web Tabs	New	What Is This?
No Web Tabs have been defined		

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.

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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. 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. 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.

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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. 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.

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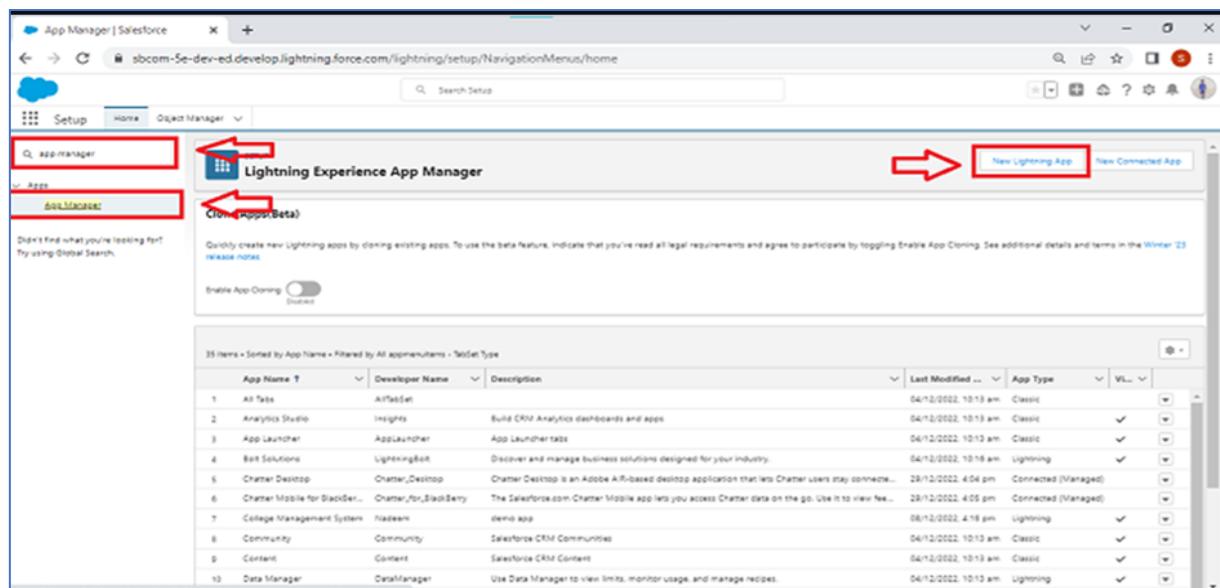
Milestone – 4

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

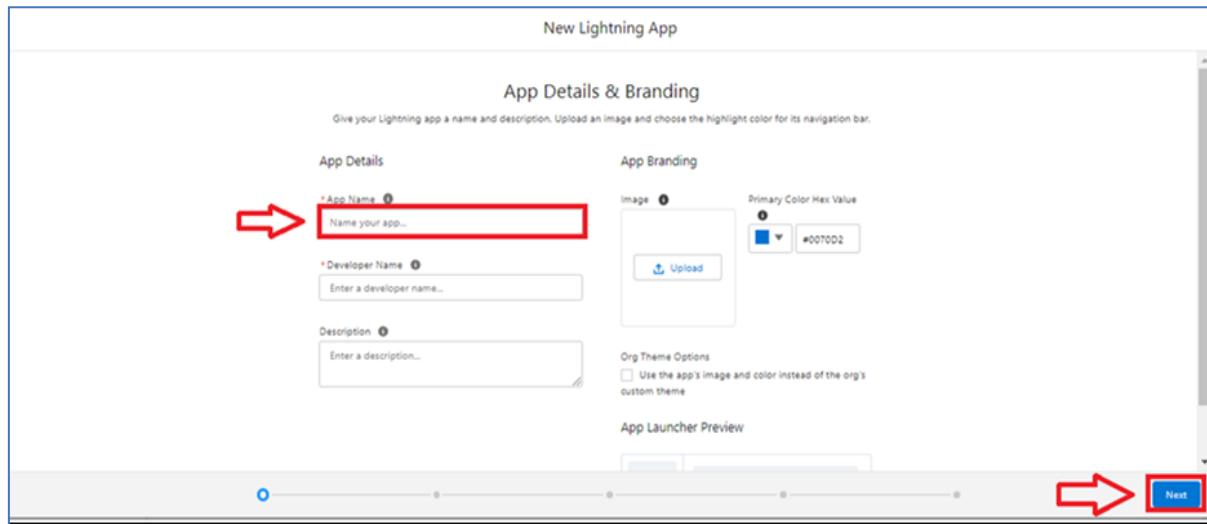
Description : Give a meaningful description

Image : optional (if you want to give any image you can otherwise not mandatory)

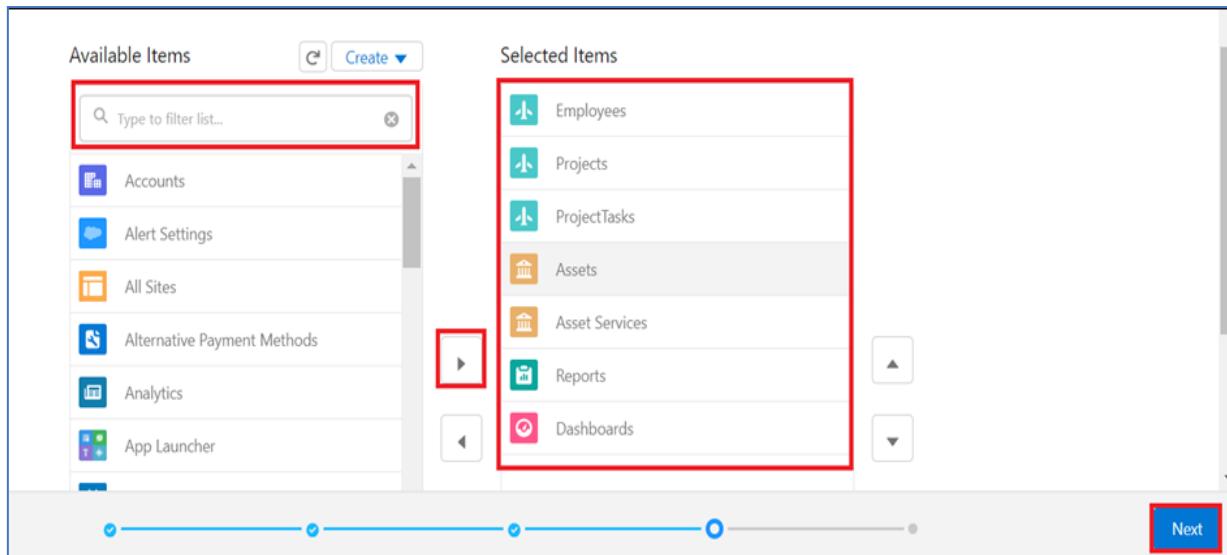
Primary color hex value : keep this default

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

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4. To Add Navigation Items:

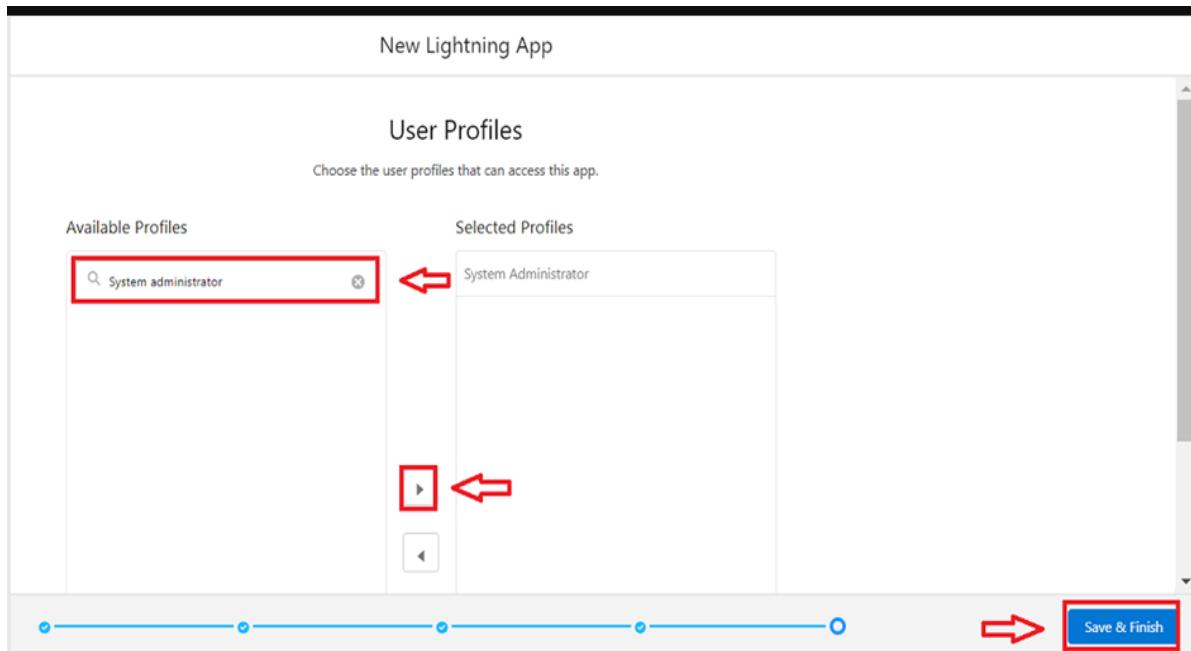


Search the items in the search bar(Employees, Projects, ProjectTask, Assets, Asset Services, Reports, Dashboard) from the search bar and move it using the arrow button --> Next.

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

5. To Add User Profiles:

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

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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.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A red arrow points to the 'Object Manager' button. Below it, a search bar contains 'Employee', also highlighted with a red box. Another red arrow points to this search bar. The main area is titled 'Object Manager' and shows a table with one item: 'Employee'. The table columns are 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The 'Employee' row has 'Employee' in the Label column and 'Employee_c' in the API Name column, both highlighted with red boxes. The 'Custom Object' type is listed under 'TYPE'. The 'Last Modified' field shows '20/06/2023'.

2. Now click on "Fields & Relationships" --> New

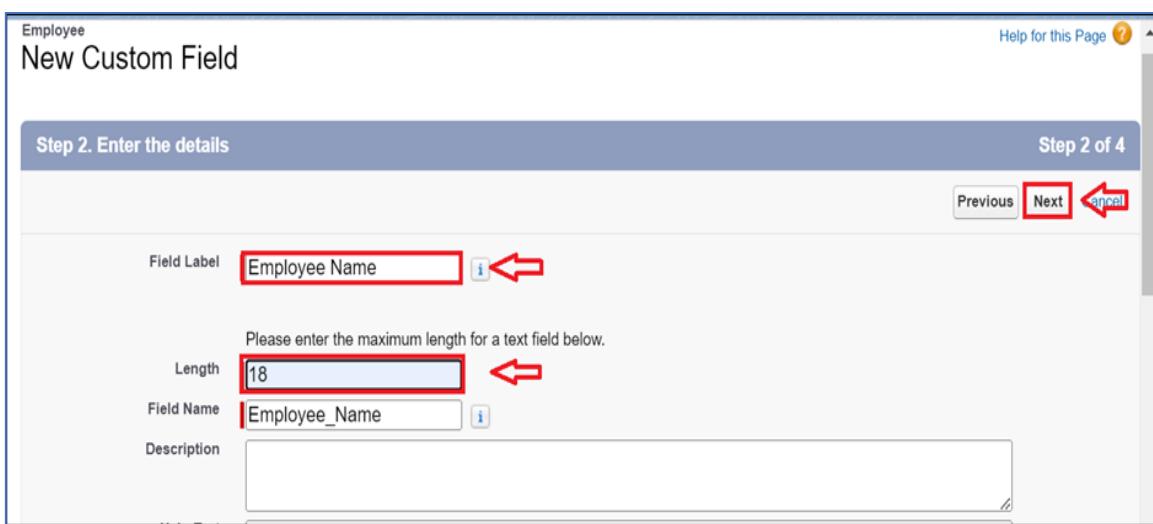
The screenshot shows the 'Fields & Relationships' page for the Employee object. On the left, there's a sidebar with 'Details', 'Fields & Relationships' (which is highlighted with a red box and has a red arrow pointing to it), 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', and 'Compact Layouts'. The main area has a header with 'Fields & Relationships', a 'Quick Find' search bar, and a 'New' button, all highlighted with red boxes. Below is a table with columns: 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The table contains five rows: 'Created By' (Field Name: CreatedById, Data Type: Lookup(User)), 'Employee ID' (Field Name: Name, Data Type: Auto Number), 'Last Modified By' (Field Name: LastModifiedById, Data Type: Lookup(User)), and 'Owner' (Field Name: OwnerId, Data Type: Lookup(User,Group)).

3. Select Data type as "Text".

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<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input checked="" type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines. <small>Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.</small>

4. Click on Next



Employee
New Custom Field

Step 2 of 4

Previous **Next** Cancel

Field Label: Employee Name

Length: 18

Field Name: Employee_Name

Description:

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.

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<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
<input type="radio"/> Date	Allows users to enter a date or pick a date from a popup calendar.
<input type="radio"/> Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
<input type="radio"/> Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass

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.

Step 2. Choose output type Step 2 of 5

Field Label ← Field Name ←

Previous Next Cancel

Auto add to custom report type Add this field to existing custom report types that contain this entity i

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value
Example: `TODAY() > CloseDate`

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost__c`

Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next = NOW() + 1`

Number Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius__c + 32` ←

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

Step 3. Enter formula

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Fahrenheit = 1.8 * Celsius + 32 [More Examples...](#)

Simple Formula **Advanced Formula**

Insert Field Insert Operator ▾

Age (Number) = **YEAR(TODAY()) - YEAR(Date_of_Birth_c)**

Check Syntax No syntax errors in merge fields or functions. (Compiled size: 71 characters)

Functions

-- All Function Categories -- ▾

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

Quick Tips

- Getting Started
- Operators & Functions

Step 3 of 5

Previous **Next** Cancel

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.

Step 2. Enter the details

Field Label **Gender**

Values Use global picklist value set Enter values, with each value separated by a new line

Male
Female

Display values alphabetically, not in the order entered
 Use first value as default value
 Restrict picklist to the values defined in the value set

Field Name **Gender**

Description

Help Text

Step 2 of 4

Previous **Next** Cancel

Workforce Administration Solution

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.

The screenshot shows a software interface for creating a new relationship. At the top, it says "Employee New Relationship". Below that, a blue header bar reads "Step 2. Choose the related object". The main area has a label "Select the other object to which this object is related." followed by a dropdown menu labeled "Related To" which contains the value "Employee". A red box highlights this dropdown. At the bottom right, there are buttons for "Previous", "Next" (which is highlighted with a red box), and "Cancel".

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.

Workforce Administration Solution

Activity 7 : Creating Remaining Fields in Employee Object

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

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

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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

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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.

The screenshot shows the Salesforce Sharing Settings page. In the left sidebar, the 'Sharing Settings' link is highlighted with a red box. On the main page, the 'Edit' button for the 'Organization-Wide Defaults' section is also highlighted with a red box. The table below lists sharing settings for various objects:

Object	Default Internal Access	Default External Access
Lead	Public Read/Write/Transfer	Private
Account and Contract	Public Read/Write	Private
Contact	Controlled by Parent	Controlled by Parent
Order	Controlled by Parent	Controlled by Parent
Asset	Controlled by Parent	Controlled by Parent
Opportunity	Public Read/Write	Private

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.

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The screenshot shows the 'Sharing Settings' page in Salesforce. It lists several objects with their default sharing settings:

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Work Type Group	Public Read/Write	Private	<input type="checkbox"/>
Asset	Public Read/Write	Private	<input checked="" type="checkbox"/>
Asset Service	Public Read/Write	Private	<input checked="" type="checkbox"/>
Employee	Private	Private	<input checked="" type="checkbox"/>
Project	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>

Below the table, there are 'Other Settings' options: Standard Report Visibility (checked), Manual User Record Sharing (unchecked), and Manager Groups (unchecked). At the bottom are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red box.

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. Search for the project 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.

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. Search for the Asset service 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.

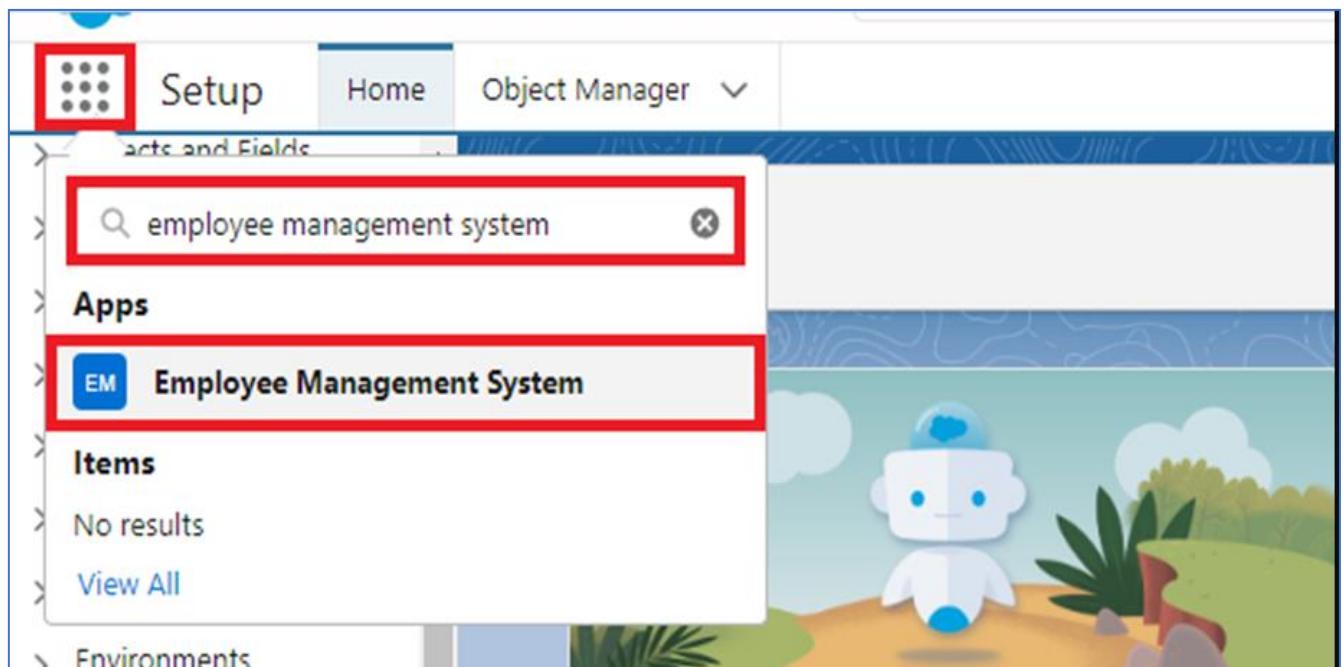
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Milestone – 7

User Adoption

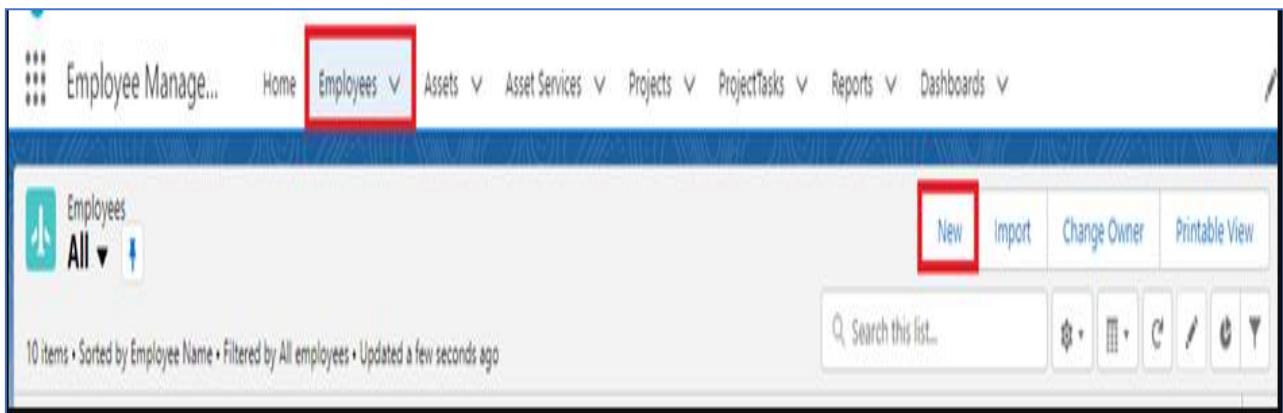
Activity 1: Create a Record (Employee)

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.

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- Fill the Details and click on Save.

Activity 2: View a Record (Employee)

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

Activity 3: Delete a Record (Employee)

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

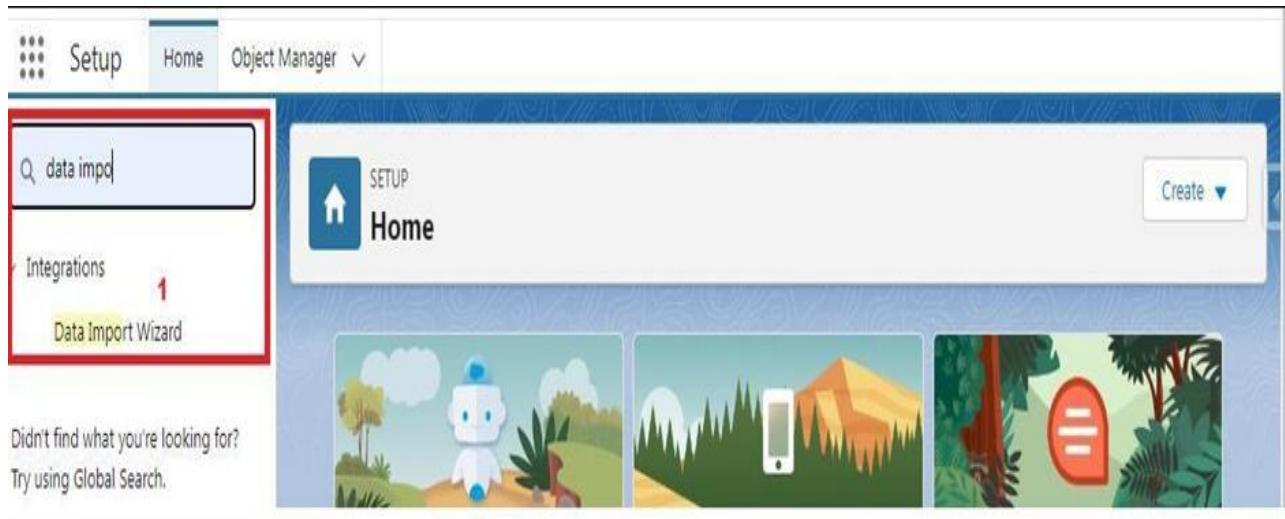
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Milestone – 8

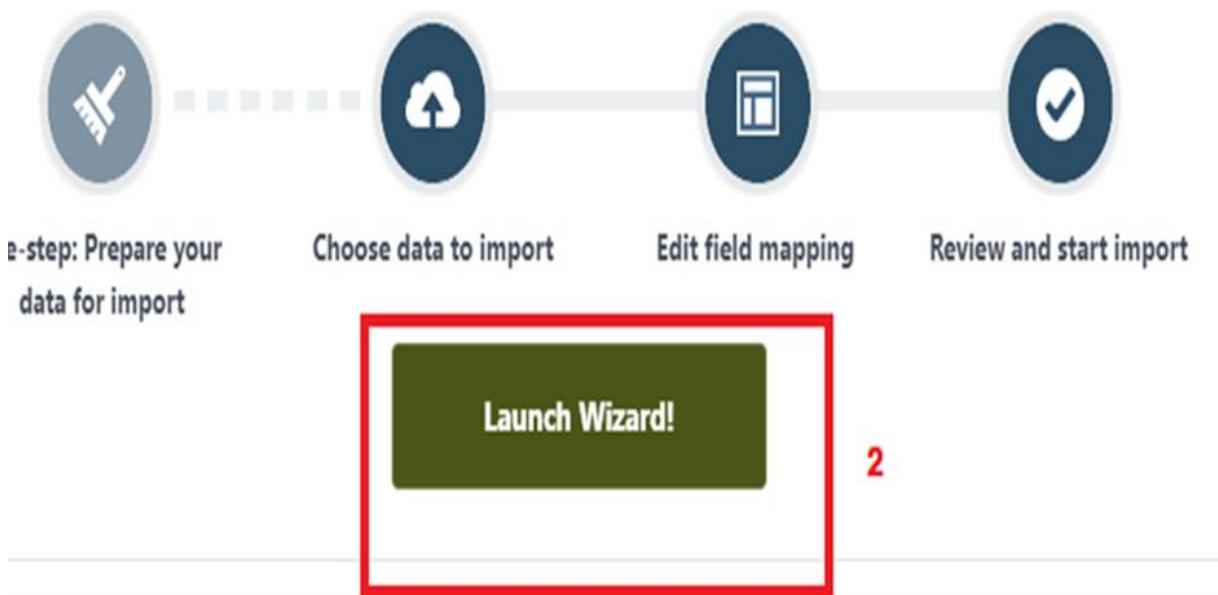
Import data

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.

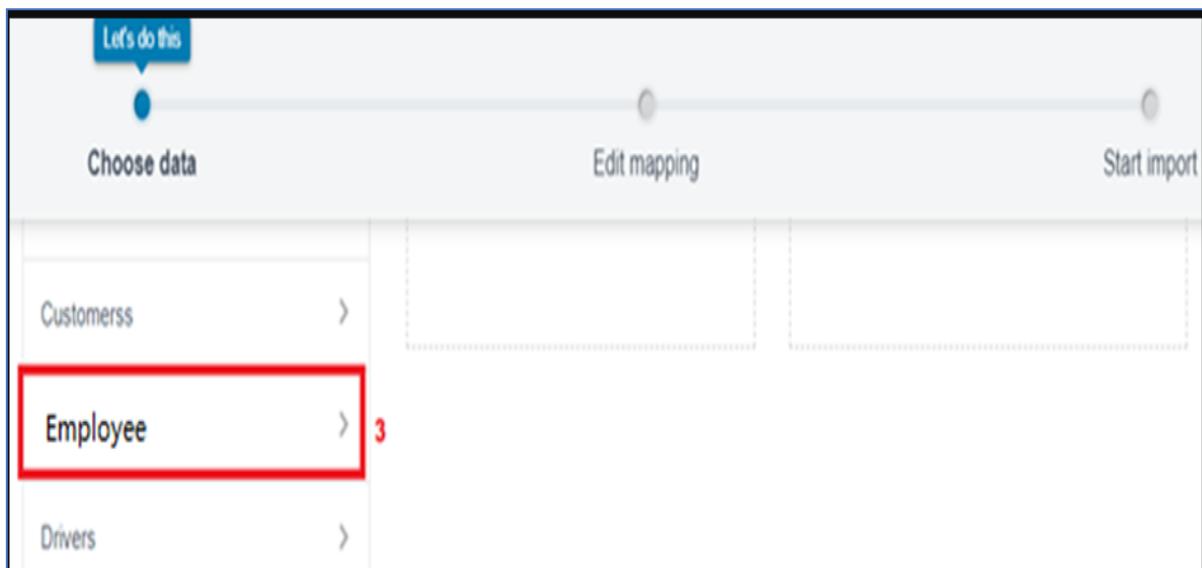


3. Click Launch Wizard!

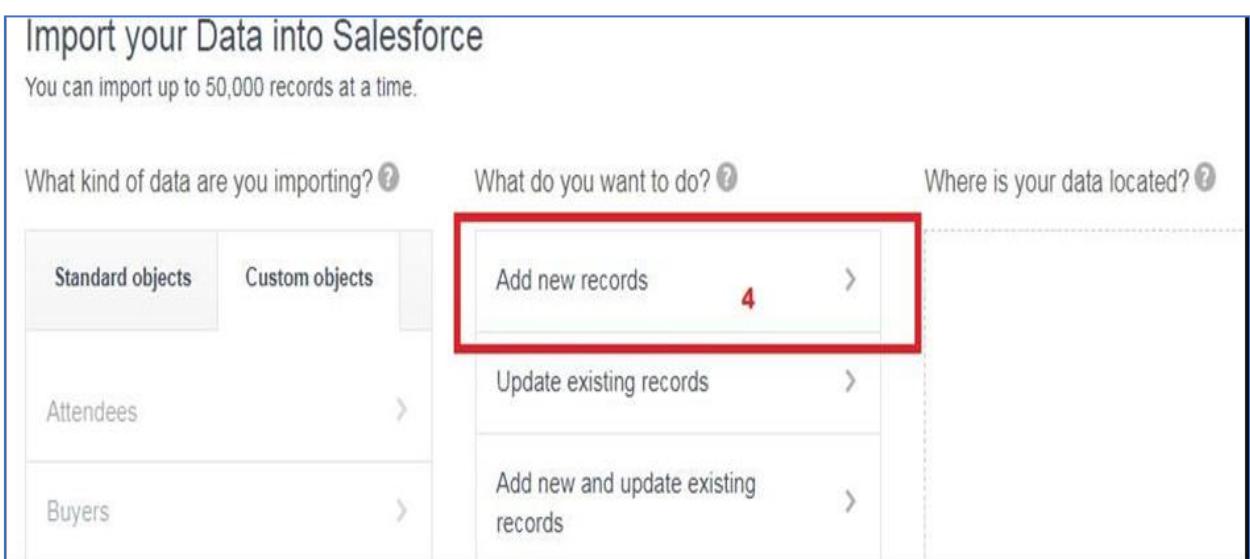


4. Click the Custom Objects tab and select the Employee object.

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5. Select Add new records.



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

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Choose data

Edit mapping

Start import

What kind of data are you importing? ?

Standard objects Custom objects

Attendees	>
Buyers	>
Customers	>
Departments	✓

What do you want to do? ?

Add new records ✓

Match by: ?
-None--

Which User field in your file designates record owners? ?
-None--

Trigger workflow rules and processes? ?
 Trigger workflow rules and processes for new and updated records

Where is your data located? ?

Drag CSV file here to upload

CSV

5

Cancel Previous 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.

Almost done

Choose data Edit mapping Start import

Edit Field Mapping: Employees [Help for this page](#)

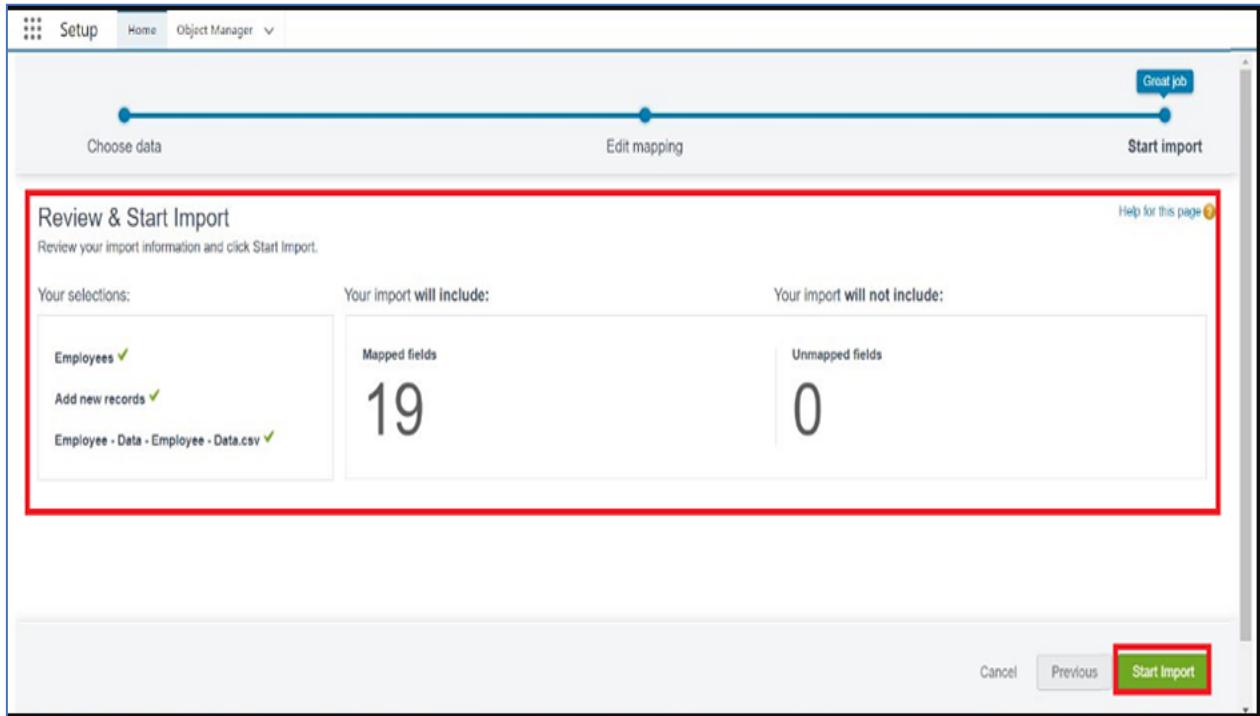
Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Employee Name	Employee Name	Jackie Chan	James	Benjamin
Change	Date of Birth	Date of Birth	01/01/1993	27/02/1998	16/03/1999
Change	Gender	Gender	Male	Male	Male
Change	Qualification	Qualification	B.Tech	B.Tech	B.Com
Change	Address	Address			
Change	Experience	Experience	9	6	5
Change	Phone no	Phone no	7905434750	7905434751	7905434752

[Cancel](#) [Previous](#) [Next](#)

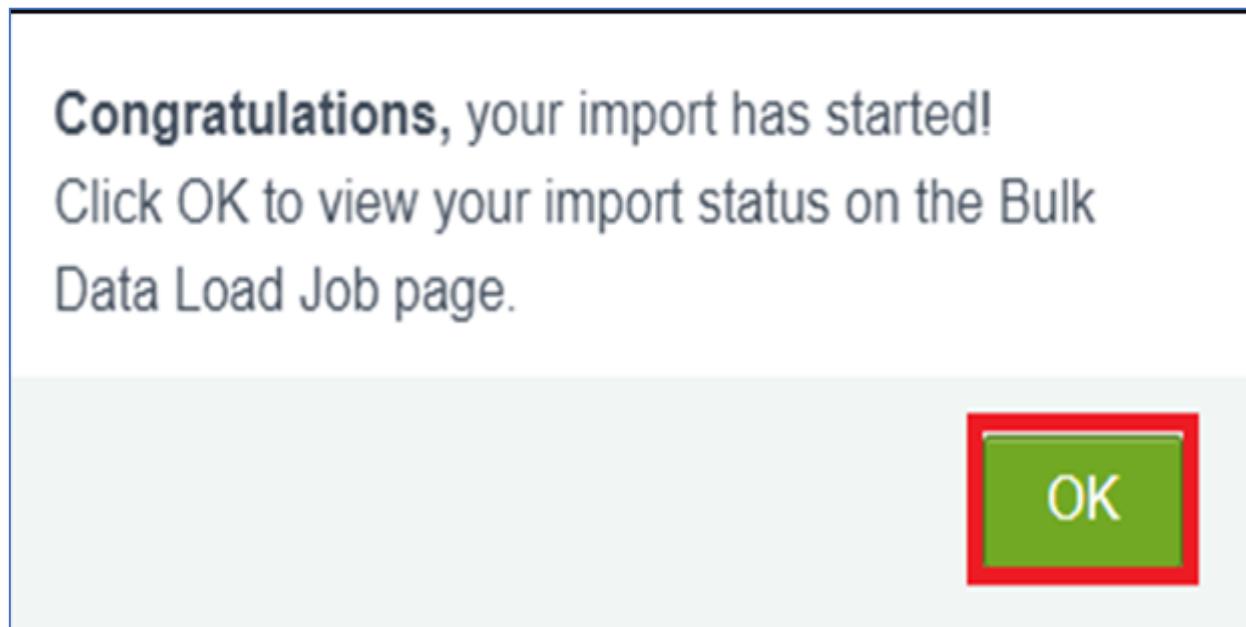
Workforce Administration Solution

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.

Workforce Administration Solution

Batches												
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Ajax Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751500000JaYH4	14/06/2023, 11:54 am	14/06/2023, 11:54 am	100	60	0	10	0	0	Completed	

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

Workforce Administration Solution

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.

The screenshot shows a 'Clone Profile' dialog box. At the top, it says 'Clone Profile'. Below that, a message says 'Enter the name of the new profile.' A red box highlights the 'Profile Name' field, which contains 'HR'. Another red box highlights the 'Save' button at the bottom right. The 'Save' button is highlighted with a red border, while the 'Cancel' button is not.

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.

Workforce Administration Solution

Custom Object Permissions						
	Basic Access			Data Administration		
	Read	Create	Edit	Delete	View All	Modify All
Assets	<input checked="" type="checkbox"/>					
Asset Services	<input checked="" type="checkbox"/>					
Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

Workforce Administration Solution

Milestone – 10

Role

Activity 1: Creating HR Role

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

The screenshot shows the Salesforce Setup interface for Roles. The left sidebar has 'Roles' selected under 'Users'. The main content area is titled 'Understanding Roles' and contains a diagram of a role hierarchy. At the top level is 'Executive Staff' with 'CEO, President' and 'CFO, VP, Sales'. Arrows point down to 'Western Sales Director' and 'Eastern Sales Director', both labeled 'Director of Sales'. Arrows from these two directors point to 'Western Sales Rep' (CA Sales Rep, Off Sales Rep) and 'Eastern Sales Rep' (NY Sales Rep, MA Sales Rep). An arrow from 'International Sales Director' points to 'International Sales Rep' (Asian Sales Rep, European Sales Rep). A legend on the right describes the permissions: 'View & edit data, roll up forecasts, & generate reports for own data only' and 'Can't access data of other Executive Staff'. A red box highlights the 'Set Up Roles' button at the bottom right.

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

The screenshot shows the 'Your Organization's Role Hierarchy' page. It lists several roles under 'Nick Enterprises': 'CEO', 'HR', 'Manager', 'On Site Emp', 'Remote Emp', and 'CVP Customer Service & Command'. Under each role, there are 'Edit | Del | Assign' buttons and an 'Add Role' link. The 'Add Role' link for the 'CEO' role is highlighted with a red box. Another red box highlights the 'Expand All' link at the top of the hierarchy tree.

3. Give Label as "HR" and Role name gets auto populated. Check to whom this role (HR) reports. Then click on Save.

Workforce Administration Solution

Role Edit
New Role

Role Edit

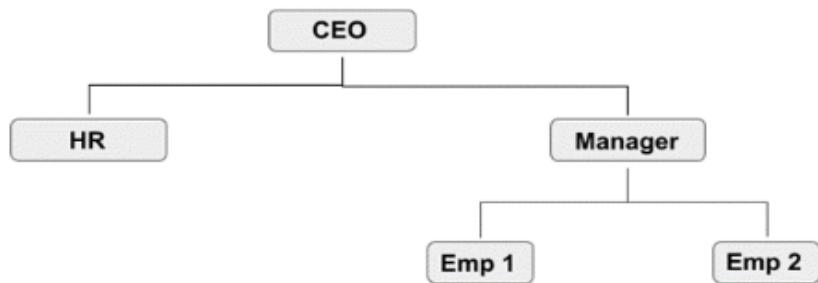
Label

Role Name

This role reports to CEO

Role Name as displayed on reports

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.

Workforce Administration Solution

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.

Workforce Administration Solution

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

The screenshot shows the 'New User' creation page in Salesforce. The 'User Edit' section contains fields for First Name, Last Name, Alias, Email, Username, and Nickname, all of which are highlighted with a red box. The 'General Information' section on the right contains fields for Role (set to HR), User License (set to Salesforce), and Profile (set to HR), also highlighted with a red box. The 'Save' button is located at the top left of the form.

3. Save

Workforce Administration Solution

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.

Workforce Administration Solution

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.

Workforce Administration Solution

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.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager' (which is highlighted with a red box). A search bar at the top right contains 'Employee'. Below the header, the title 'Object Manager' is displayed above a table. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. One row is visible for 'Employee' (API Name: Employee__c, Type: Custom Object). On the far right of this row is an 'Edit' button, which is also highlighted with a red box. The status bar at the bottom indicates '1 Items, Sorted by Last Modified'.

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

The screenshot shows the 'Page Layouts' section of the Employee object's details page. The left sidebar has tabs: 'Details', 'Fields & Relationships', 'Page Layouts' (which is highlighted with a red box), and 'Lightning Record Pages'. The main area shows a table titled 'Page Layouts' with one item: 'Employee Layout'. The table columns are: PAGE LAYOUT NAME, CREATED BY, and MODIFIED BY. The 'New' button in the top right corner is also highlighted with a red box.

3. Give Page layout Name as "On Site Employee Layout" and click on Save.

Workforce Administration Solution

Create New Page Layout

As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections.

Existing Page Layout: Employee Layout
Page Layout Name: On Site Employee Layout

Save Cancel

- Drag and drop the Section from the highlight panel below the Information and name it as "Personal Information" and click Ok.
- Drag Date of Birth, Address and Age fields from Employee Information to Personal Information section.
- Similarly perform the above step to create "Allowances" and add allowances fields in it as shown below.

	Cab Allowance	Email	Food Allowance Am...	Last Modified By	Mode of Work	Reports to
Cab Allowance Amount	₹123.45					
Employee ID	GEN-2004-001234					
Employee Name	Sample Text					
Gender	Sample Text					
Experience	Sample Text					
Email	sarah.sample@company.com					
Joining date	21/06/2023					
LinkedIn Profile	www.salesforce.com					
Address	Sample Text					
Date of Birth	21/06/2023					
Age	50.12					
Cab Allowance	✓					
Food Allowances	✓					

Workforce Administration Solution

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.

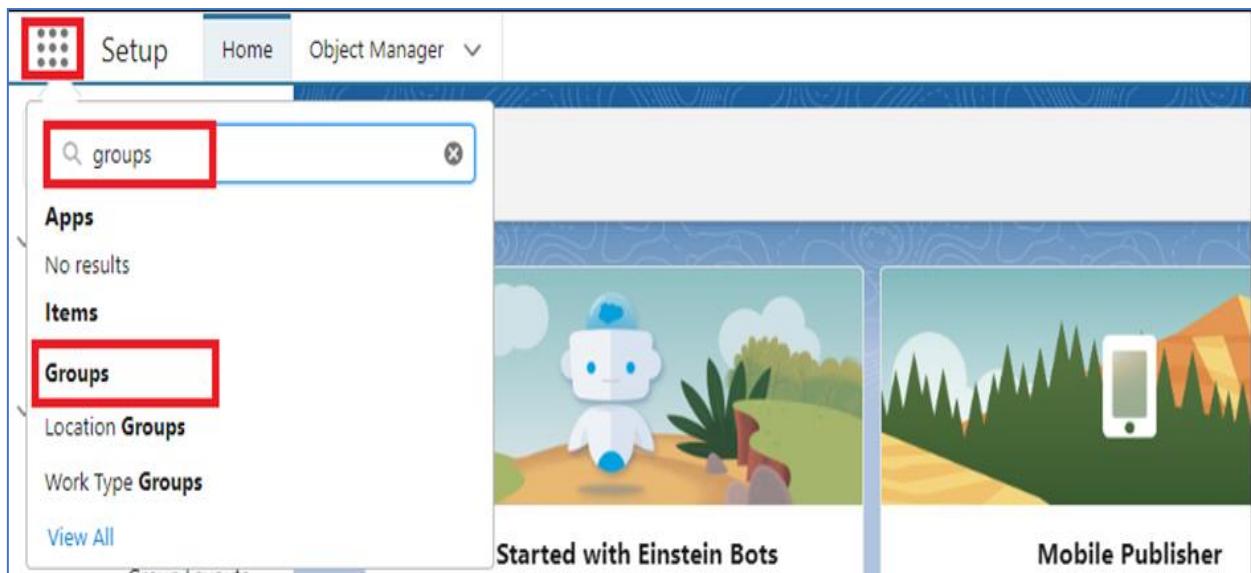
Workforce Administration Solution

Milestone – 13 Chatter Group

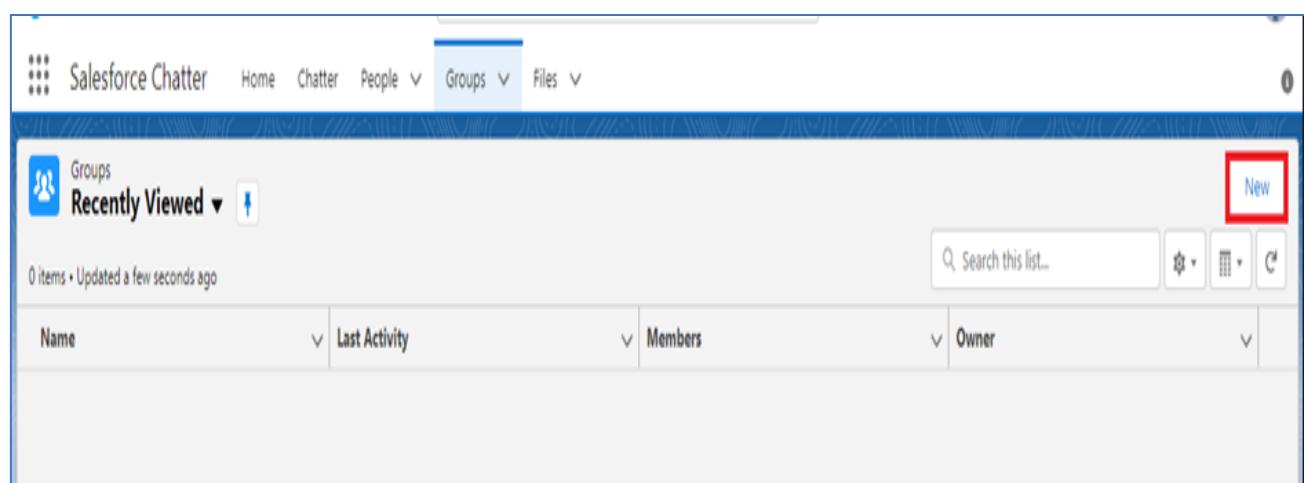
Activity 1 : Creating a chatter group for your organization.

To Create a chatter group:

1. Click the App Launcher.
2. Enter Groups in the Search apps and items... box and select Groups.



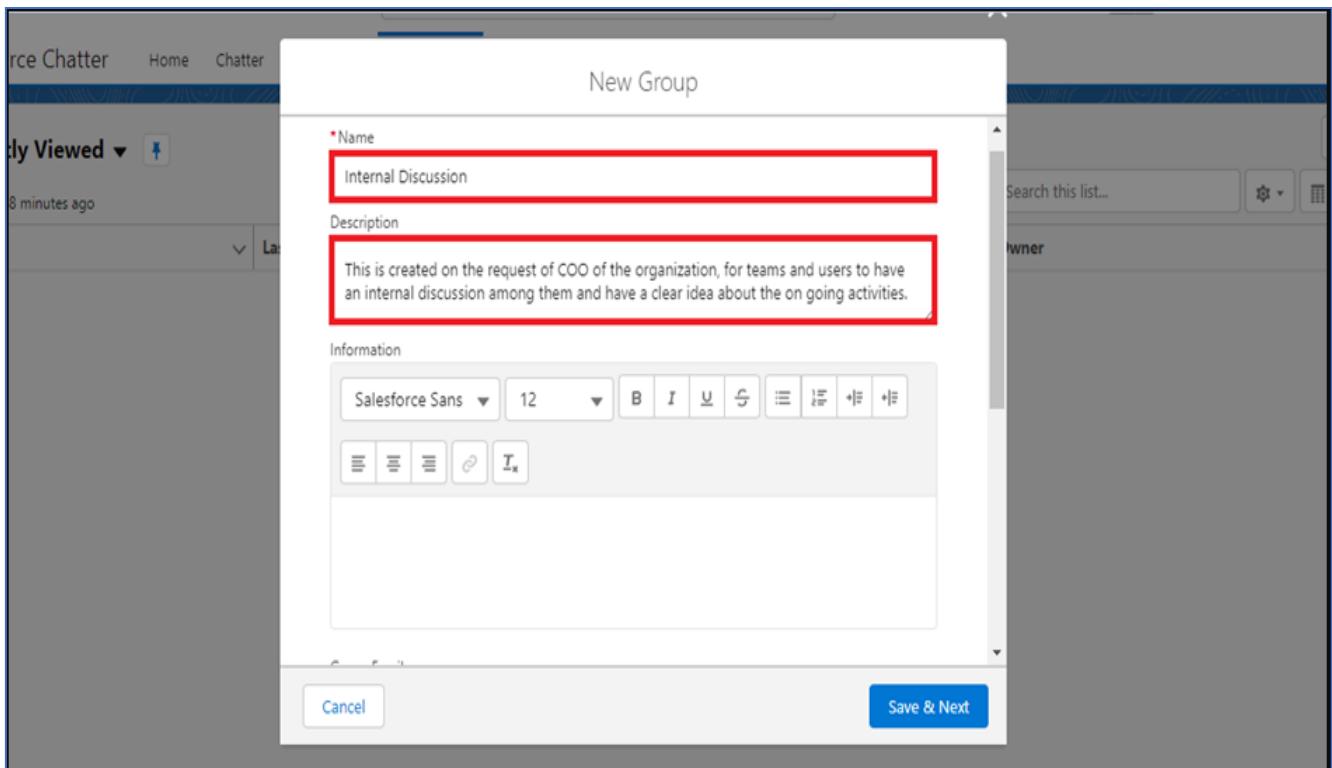
3. Click New.



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

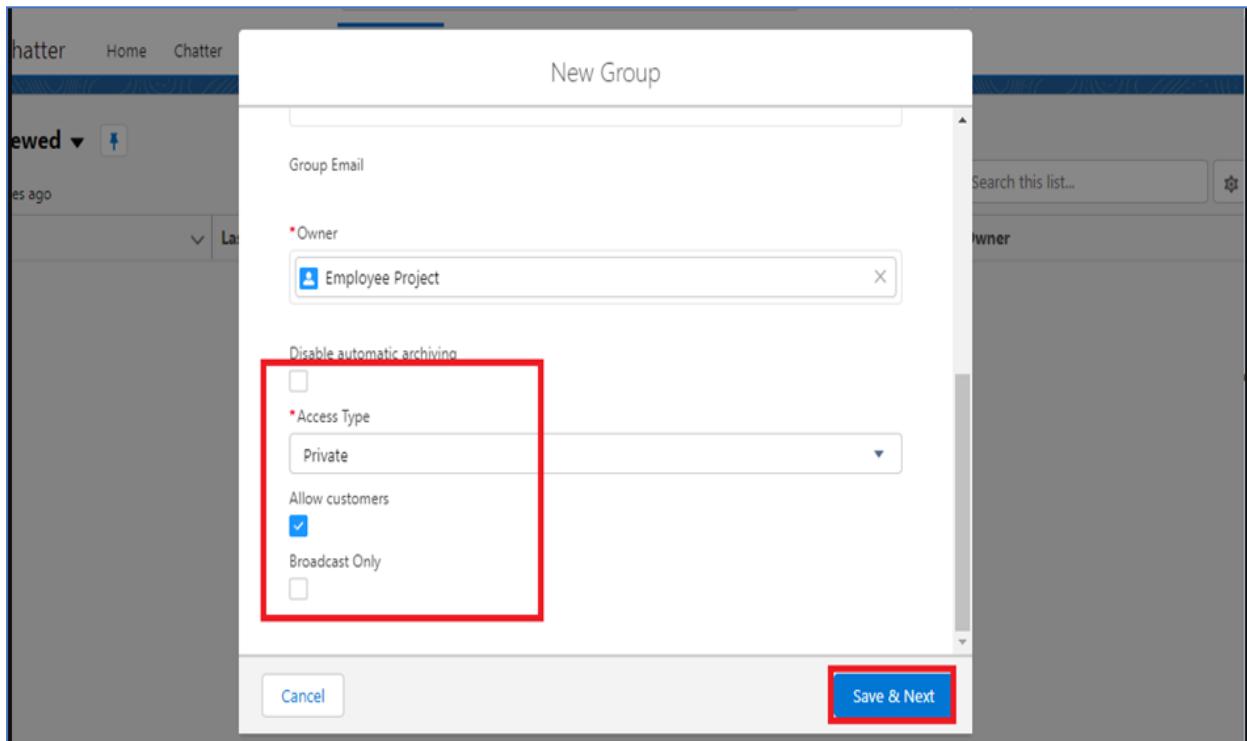
Workforce Administration Solution

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

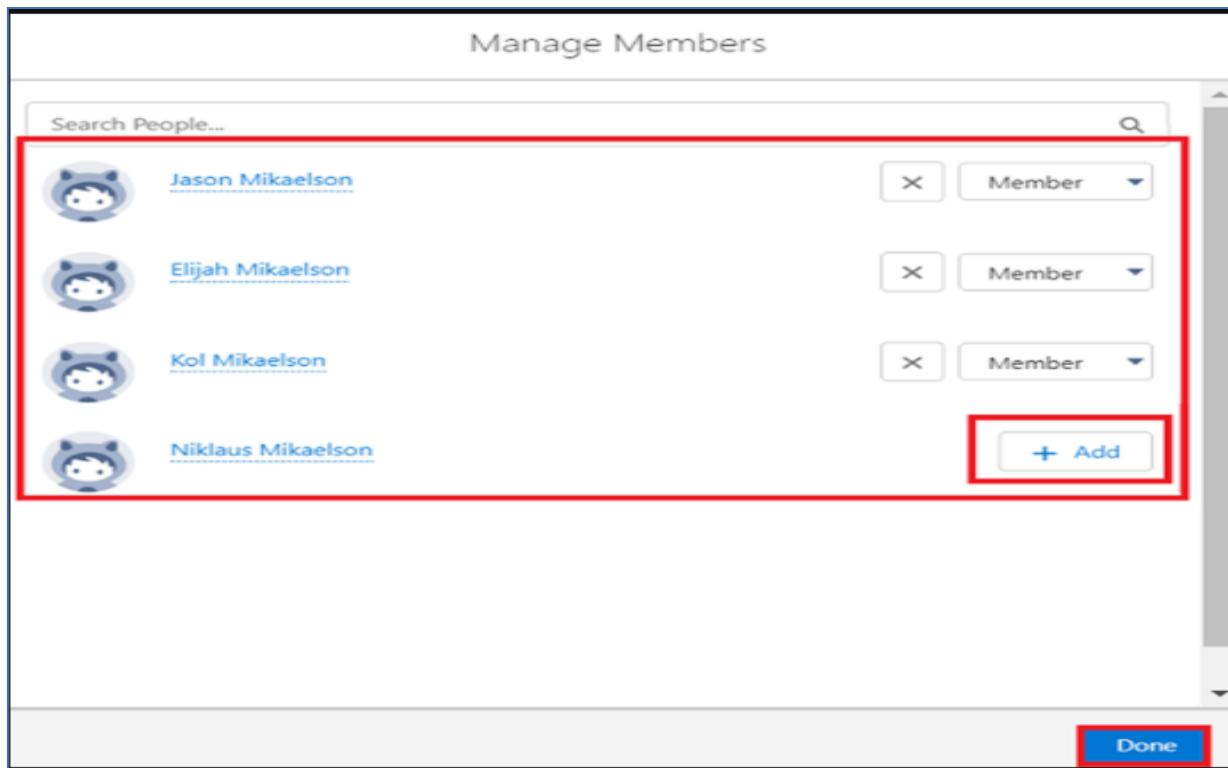


5. Click Save & Next. Skip the Upload Picture section and click Next.

Workforce Administration Solution

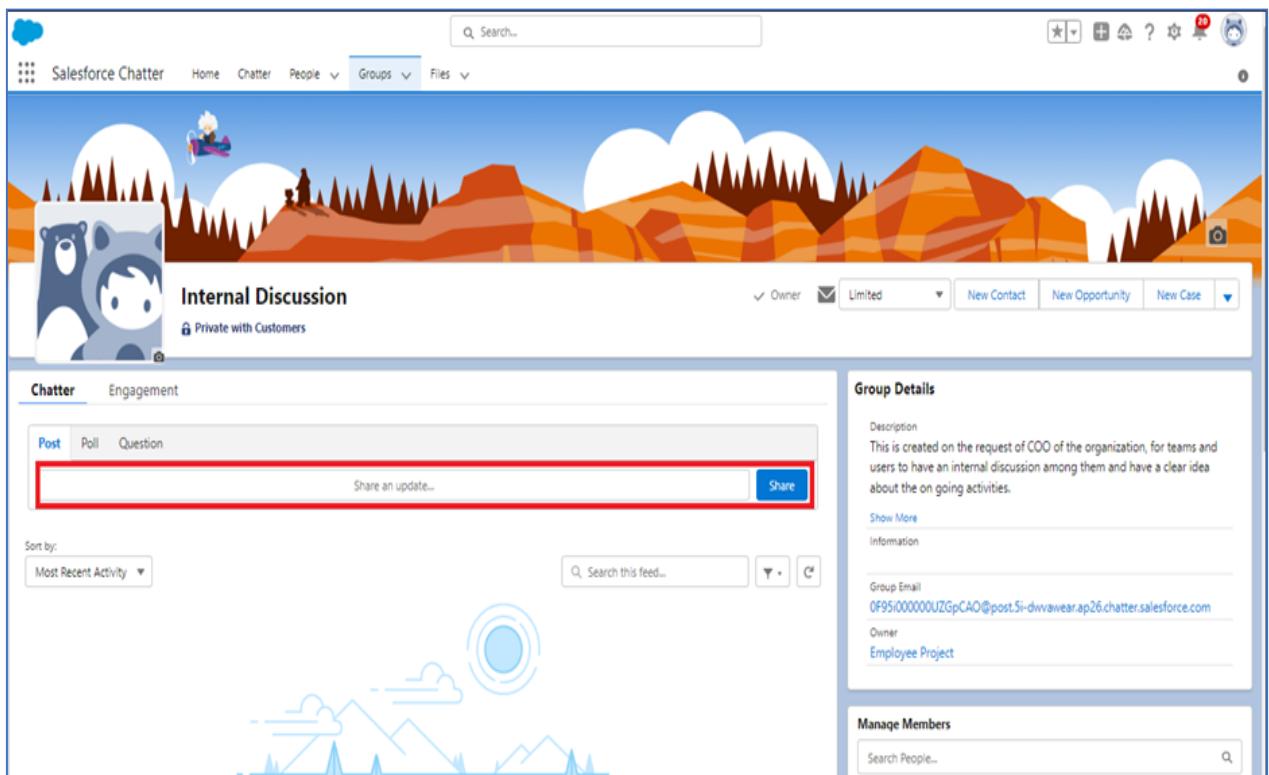


6. On the Manage Members screen, click Add next to users you created in the previous activity.



Workforce Administration Solution

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.

Workforce Administration Solution

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.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Employee'. The main table lists one item: 'Employee' with API name 'Employee__c' and type 'Custom Object'. The 'Edit' button in the last column of the table is highlighted with a red box. The left sidebar shows various setup options like Details, Fields & Relationships, Page Layouts, etc., with 'Record Types' also highlighted with a red box.

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

The screenshot shows the 'Record Types' page under the 'Employee' object in the Object Manager. The left sidebar has 'Record Types' selected. The main area displays a table with columns 'RECORD TYPE LABEL', 'DESCRIPTION', 'ACTIVE', and 'MODIFIED BY'. A 'New' button in the top right corner is highlighted with a red box. The status message 'No items to display.' is visible at the bottom.

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

Workforce Administration Solution

New Record Type
Employee Help for this Page 

Step 1. Enter the details Step 1 of 2

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type | = Required Information

Existing Record Type	--Master--
Record Type Label	On Site Employee
Record Type Name	On_Site_Employee 
Description	
Active	<input checked="" type="checkbox"/>

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>

4. Uncheck for "Make Available".

Profile Name	Record Types Currently Available	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter Free User		<input type="checkbox"/>	<input type="checkbox"/>

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

Workforce Administration Solution

Force.com - Free User	<input type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
HR	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	<input type="checkbox"/>	<input type="checkbox"/>
Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input type="checkbox"/>	<input type="checkbox"/>
On Site Employee	<input type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input type="checkbox"/>	<input type="checkbox"/>
Remote Employee	<input type="checkbox"/>	<input type="checkbox"/>
Salesforce API Only System Integrations	<input type="checkbox"/>	<input type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input type="checkbox"/>	<input type="checkbox"/>
Standard User	<input type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Work.com Only User	<input type="checkbox"/>	<input type="checkbox"/>

6. Select “Apply a different layout for each profile”, and change page layout to On Site Employee Layout for manager profile and System Administrator.

Employee Record Type	On Site Employee
Record Type Name	On_Site_Employee
Description	
Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.	
<input type="radio"/> Apply one layout to all profiles <input type="button" value="Select Page Layout -"/>	
<input checked="" type="radio"/> Apply a different layout for each profile	
Profile:	Page Layout
Analytics Cloud Integration User	<input type="button" value="Employee Layout"/>
Analytics Cloud Security User	<input type="button" value="Employee Layout"/>

Workforce Administration Solution

User Profile	Page Layout
Custom: Sales Profile	Employee Layout
Custom: Support Profile	Employee Layout
Force.com - App Subscription User	Employee Layout
Force.com - Free User	Employee Layout
Gold Partner User	Employee Layout
HR	Employee Layout
Identity User	Employee Layout
Manager	On Site Employee layout
Marketing User	Employee Layout
Minimum Access - Salesforce	Employee Layout
On Site Employee	Employee Layout
Partner App Subscription User	Employee Layout
Partner Community Login User	Employee Layout
Partner Community User	Employee Layout
Read Only	Employee Layout
Remote Employee	Employee Layout
Salesforce API Only System Integrations	Employee Layout
Silver Partner User	Employee Layout
Solution Manager	Employee Layout
Standard Platform User	Employee Layout
Standard User	Employee Layout
System Administrator	On Site Employee layout
Work.com Only User	Employee Layout

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.

The screenshot shows the 'Employee Management' application interface. The top navigation bar includes links for Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports (which is highlighted with a red box), and Dashboards. Below the navigation bar, the main content area is titled 'Reports' and shows a list of recent reports. The list includes two items: 'Employee's working on projects report' and 'Assets assigned to Employees'. The 'Recent' category is selected in the sidebar on the left. A red box highlights the 'New Report' button in the top right corner of the report list area.

3. Select report type from category or from report type panel or from search panel --> click on start report.

The screenshot shows the 'Create Report' dialog box. On the left, there is a sidebar with categories: Recently Used, All, Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, and Price Books, Products and Assets. The 'All' category is selected. In the center, a search panel titled 'Select a Report Type' has a search input field containing 'employee', which is also highlighted with a red box. Below the search field is a list of report types categorized by 'Category': Activities with Employees, Employees, Employees with Reports to, Employees with ProjectTasks and Projects, Employee History, Assets with Employee Name, and Projects with ProjectTasks and Employees. To the right, the 'Details' panel shows the 'Employees' report type selected, with a 'Start Report' button highlighted with a red box. Other sections include 'Created By You' (No Reports Yet) and 'Objects Used in Report Type' (Owner).

Workforce Administration Solution

4. Customize your report

--> Add fields from left pane as shown below

The screenshot shows the 'Employee Management' application interface. In the top navigation bar, there are tabs for Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports, and Dashboards. The 'Reports' tab is currently selected. Below the navigation, a 'REPORT' dropdown is open, showing 'New Employees Report' and 'Employees'. The main content area is titled 'New Employees Report' and shows a preview of the report results. A message at the top of the preview says 'Previewing a limited number of records. Run the report to see everything.' The preview table has columns for Employee Name, Employee ID, Reports to, Login Time, Logout Time, Mode of Work, and LinkedIn Profile. Two rows of data are visible: 'Employee' and 'Emp for Junction test'. On the left side, there is a 'Fields' panel with sections for 'Groups' (containing 'GROUP ROWS' and 'Add group...'), 'Columns' (containing 'Add column...'), and a list of available fields: Employee Name, Employee ID, Reports to, Login Time, Logout Time, Mode of Work, and LinkedIn Profile. The 'Fields' panel and the top right corner of the preview area are both highlighted with red boxes.

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.

Workforce Administration Solution

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".

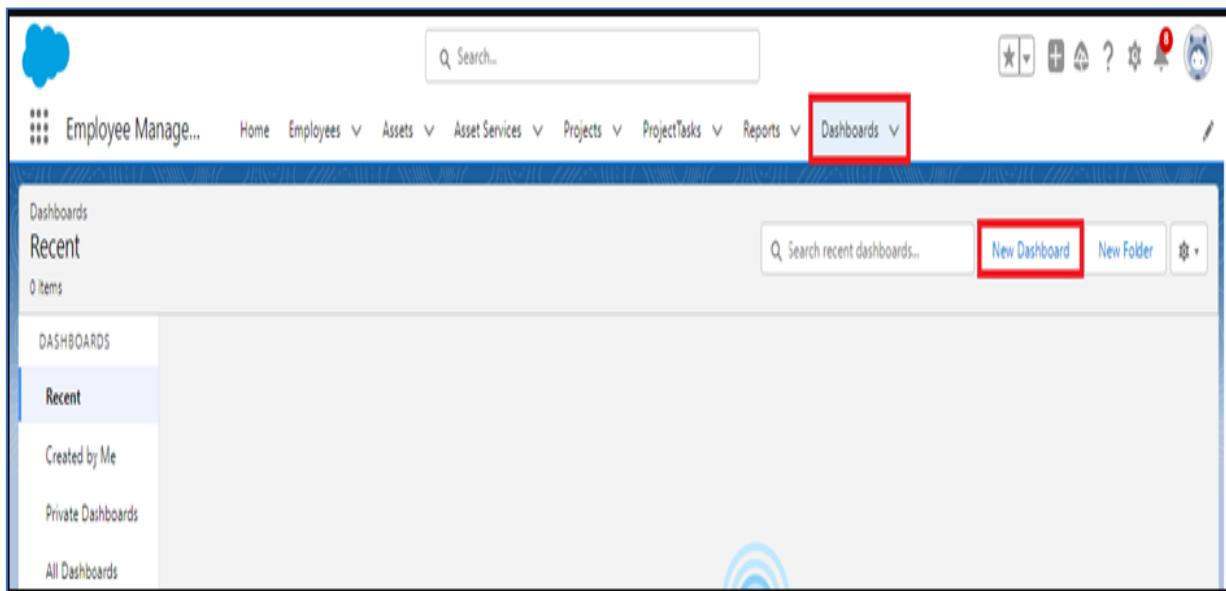
Workforce Administration Solution

Milestone – 16 Dashboards

Activity 1: Create Dashboard

To Create a Dashboard

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

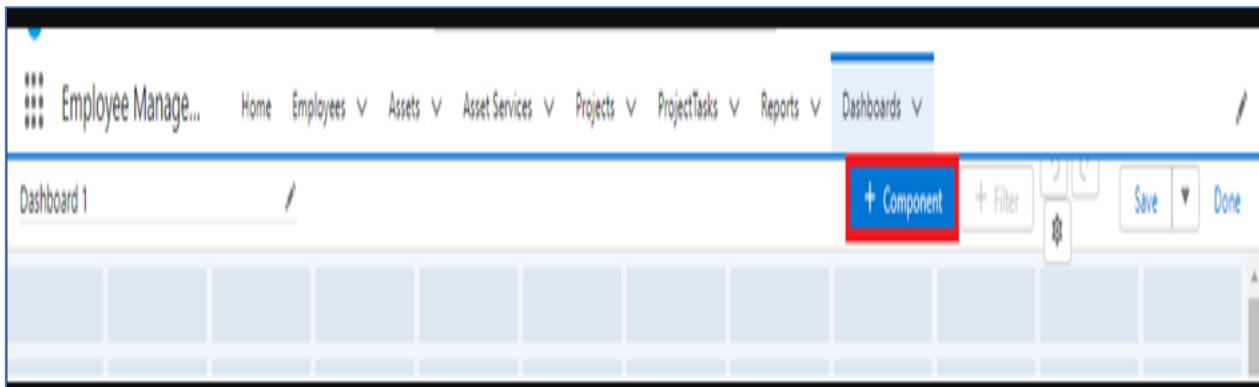


- a. Give a Name and click on create

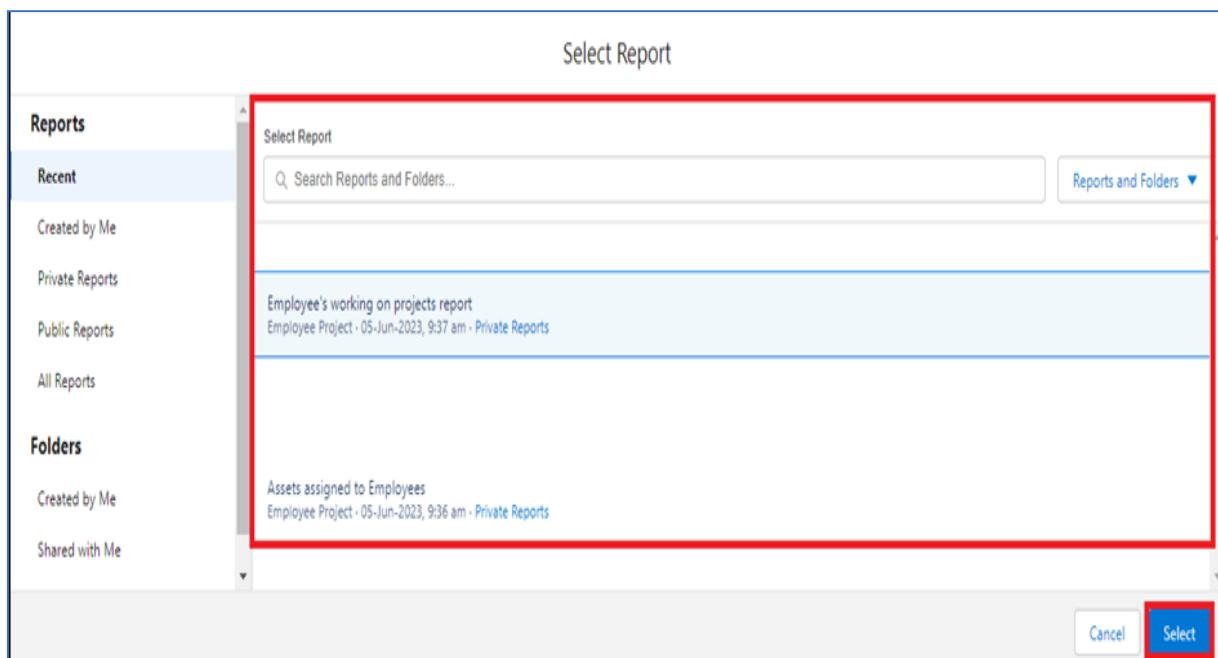
The screenshot shows the 'New Dashboard' dialog box. It has fields for 'Name' (containing 'Dashboard 1'), 'Description' (empty), and 'Folder' (set to 'Private Dashboards'). There is a 'Select Folder' button and a 'Cancel' button. The 'Create' button at the bottom right is highlighted with a red box.

- b. Select add component.

Workforce Administration Solution



- 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.

Workforce Administration Solution

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 <div style="border: 1px solid black; padding: 5px; display: inline-block;">Submitted Approved Rejected</div> Note: Make sure the Status field is read only for everyone. (Give read only permission in step 3 while creating the field)

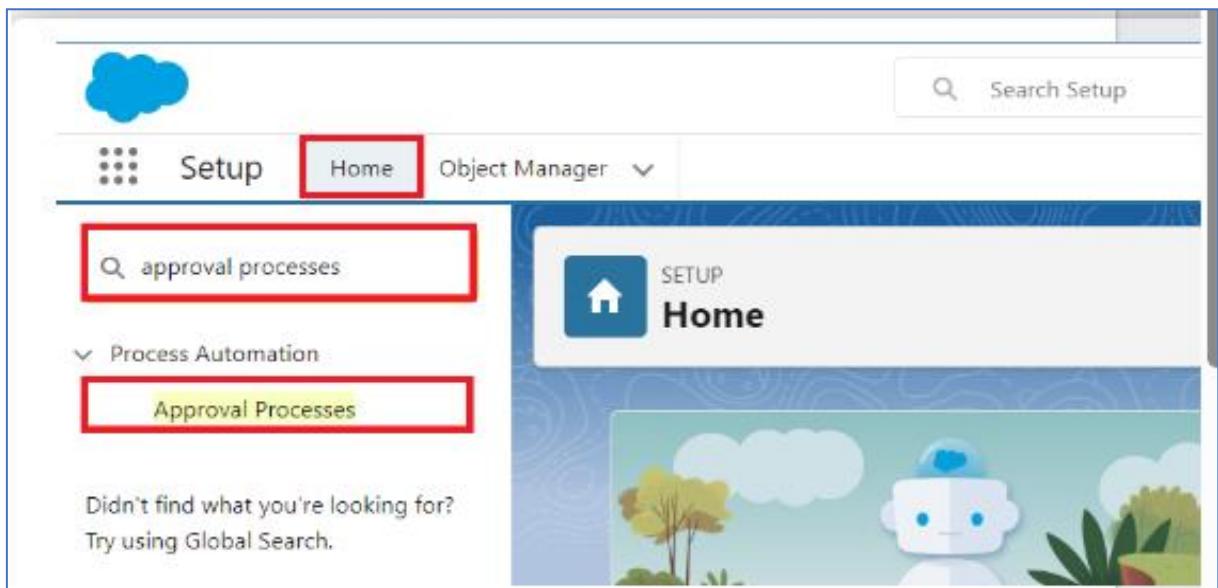
Create the tab for the leave object.

Activity 2

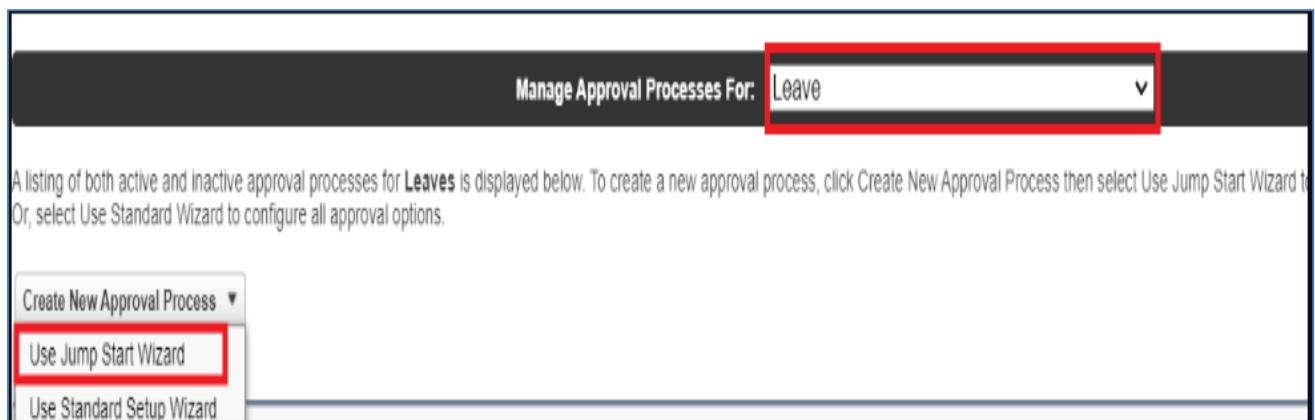
Create an Approval Process for Leave object.

1. Go to Setup --> type Approval Processes in quick find --> click on Approval Processes.

Workforce Administration Solution



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)

Workforce Administration Solution

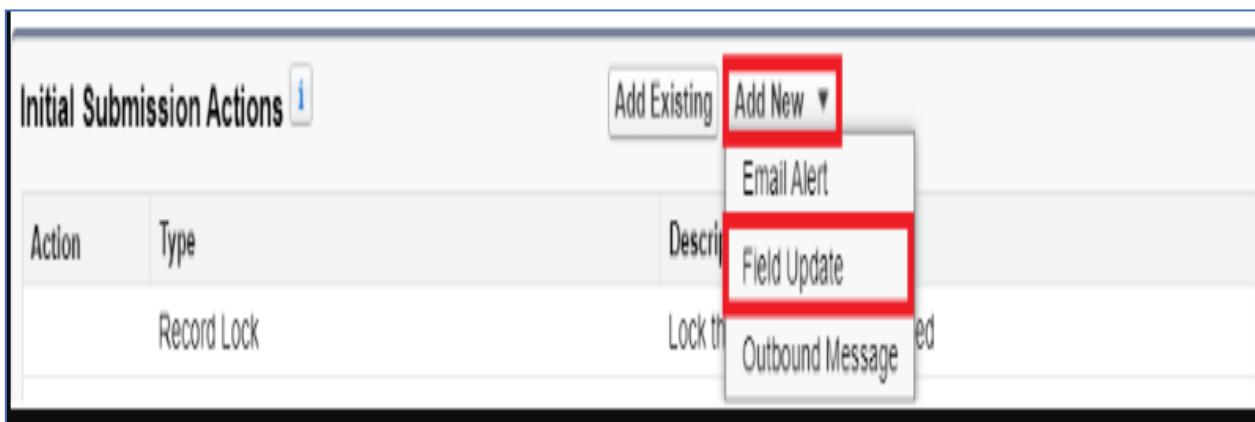
Approval Assignment Email Template	Leave blank
Add the Submit for Approval button and Approval History related list to all Travel Approval page layouts	Leave this selected/checked
Use Approver Field of Leave Owner	Leave unselected/unchecked.
Select Approver	select Automatically assign to approver(s)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

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Edit Field Update
Approval Status to Submitted

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the new value.

Fields are shown only for the type that you select.

Field Update Edit

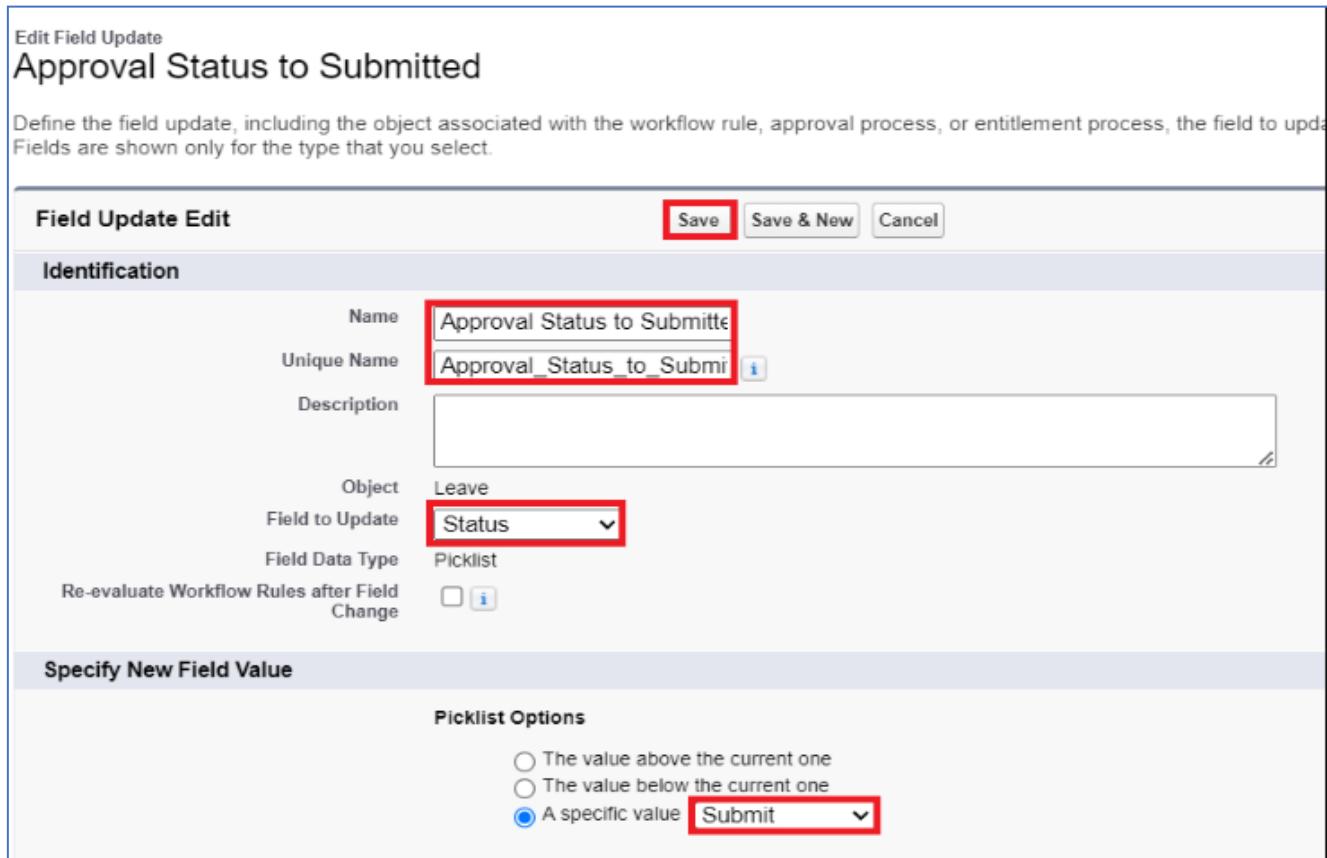
Identification

Name	Approval Status to Submitted
Unique Name	Approval_Status_to_Submit
Description	(empty)
Object	Leave
Field to Update	Status
Field Data Type	Picklist
Re-evaluate Workflow Rules after Field Change	<input type="checkbox"/> i

Specify New Field Value

Picklist Options

The value above the current one
 The value below the current one
 A specific value **Submit**



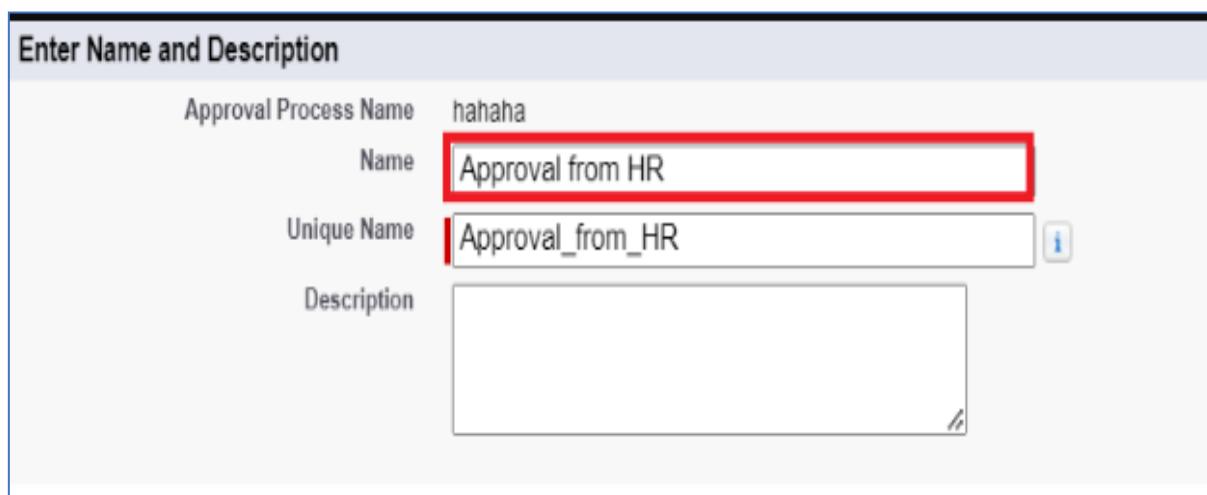
Activity 4

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.

Enter Name and Description

Approval Process Name	hahaha
Name	Approval from HR
Unique Name	Approval_from_HR
Description	(empty)



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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

Specify Step Criteria

All records should enter this step.

Enter this step if the following criteria are met

Field	Operator	Value	AND
Leave: No. of Days	equals	5	AND
-None--	--None--		

[Add Filter Logic](#)

[Previous](#) [Save](#) [Cancel](#)

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.

Select Approver

Let the submitter choose the approver manually.

Automatically assign to queue.

Automatically assign to approver(s).

User	Niklaus Mikaelson	<input type="button" value=""/>
------	-------------------	---------------------------------

[Add Row](#) [Remove Row](#)

When multiple approvers are selected:

Approve or reject based on the FIRST response.

Require UNANIMOUS approval from all selected approvers.

The approver's delegate may also approve this request.

Reject Behavior

What should happen if the approver rejects this request?

Perform all rejection actions for this step AND all final rejection actions. (Final Rejection)

Perform ONLY the rejection actions for this step and send the approval request back to the most recent approver. (Go Back 1 Step)

[Previous](#) [Cancel](#)

6. Click on Save.

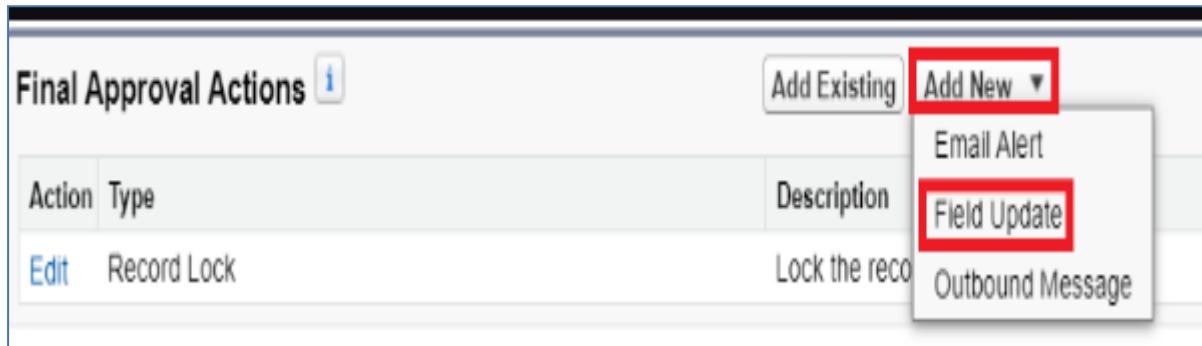
7. No, I'll do this later. Take me to the approval process detail page to review what I've just created and click Go.

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Activity 5

Final Approval Action:

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



- 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.

The screenshot shows the 'Edit Field Update' page for 'Approval Status to Approved'. The page has a header with 'SETUP' and 'Field Updates'. Below the header, it says 'Edit Field Update Approval Status to Approved' and 'Help for this Page'. The main area is titled 'Field Update Edit' with buttons 'Save', 'Save & New', and 'Cancel'. A note indicates that fields shown are only for the type selected. The 'Identification' section includes fields for 'Name' (Approval Status to Approve), 'Unique Name' (Approval_Status_to_Appro), 'Description' (empty), 'Object' (Leave), 'Field to Update' (Status), 'Field Data Type' (Picklist), and 'Re-evaluate Workflow Rules after Field Change' (unchecked). The 'Specify New Field Value' section shows 'Picklist Options' with three radio buttons: 'The value above the current one', 'The value below the current one', and 'A specific value' (Approved, which is checked). There is also a note about required information.

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Activity 6

Final Rejection Action:

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

Field Update Edit

Identification

Name: Approval Status to Approved

Unique Name: Approval_Status_to_Appro

Description:

Object: Leave

Field to Update: Status

Field Data Type: Picklist

Re-evaluate Workflow Rules after Field Change:

Specify New Field Value

Picklist Options

The value above the current one
The value below the current one
A specific value: Approved

- 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.

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and Fields are shown only for the type that you select.

Field Update Edit

Identification

Name: Approval Status to Rejected

Unique Name: Approval_Status_to_Reject

Description:

Object: Leave

Field to Update: Status

Field Data Type: Picklist

Re-evaluate Workflow Rules after Field Change:

Specify New Field Value

Picklist Options

The value above the current one
The value below the current one
A specific value: Rejected

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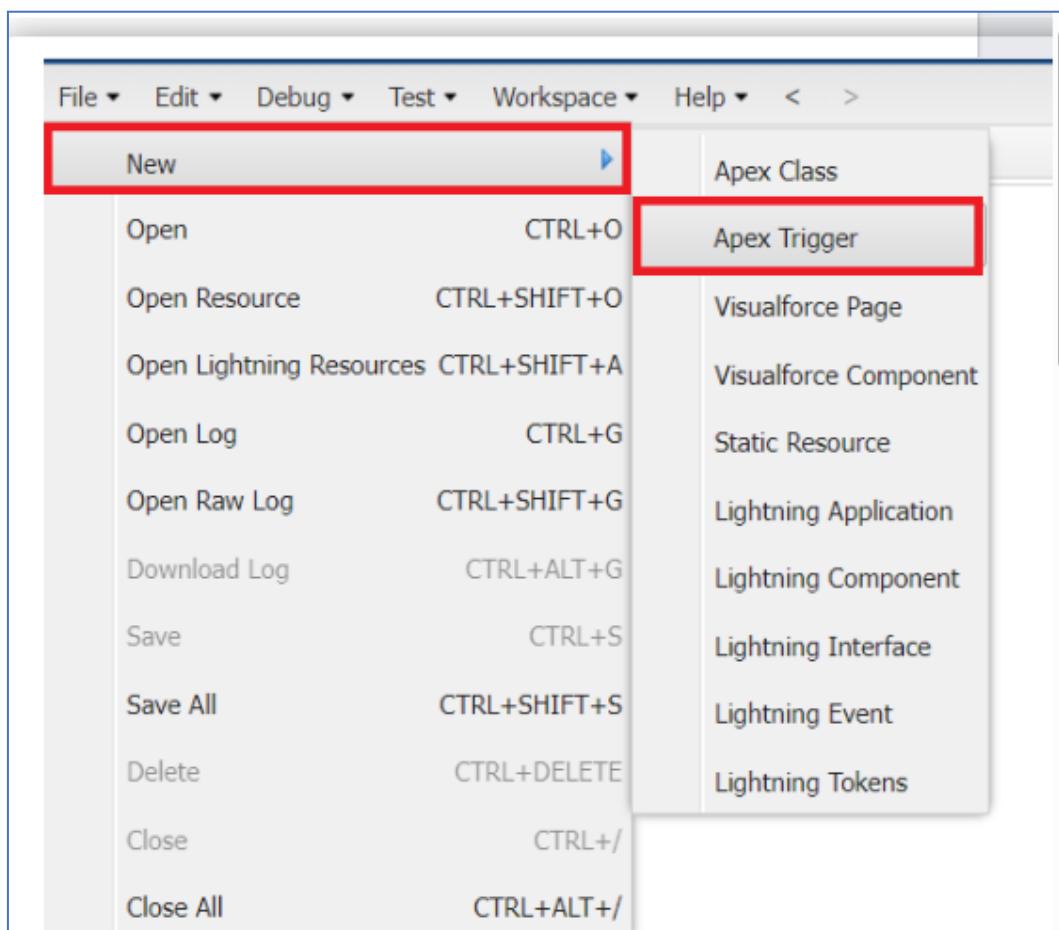
Milestone – 18

Apex Trigger

Activity 1 : Create an Apex Trigger

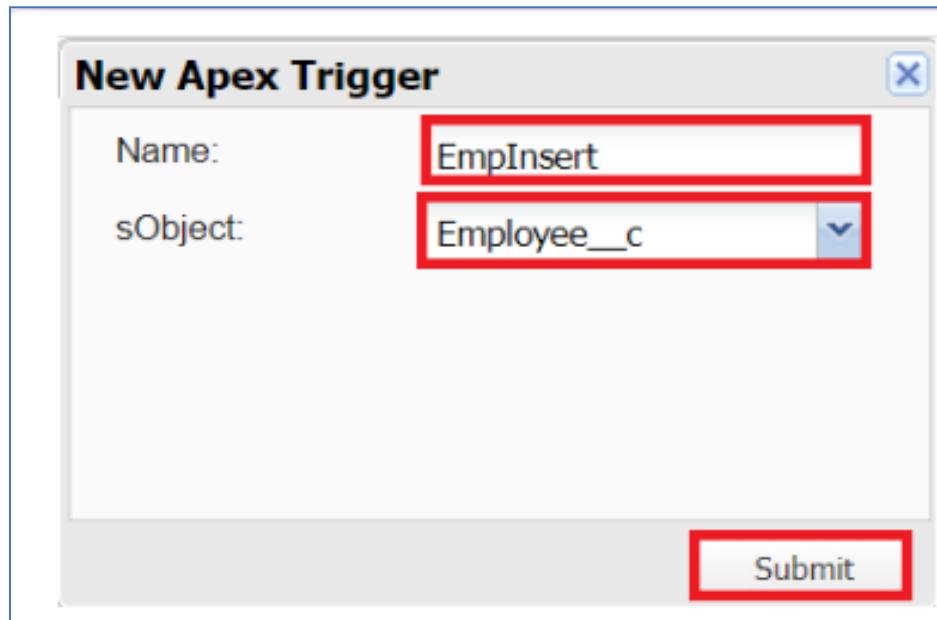
Create an Apex Trigger

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 "EmplInsert", and select "Employee__c" from the dropdown for sObject.

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3. Click Submit.
4. Now write the code logic here

```
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');
        }
    }
}
```

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){
```

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```
    pass.NameaddError('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".

New Employee: On Site Employee

Information		
Employee ID	Owner	
Employee Name	 demo project	
Jackie Chan	Reports to	
Gender	Search Employees... 	
--None--	Qualification	
Experience	Phone no	
Email	Mode of Work	
	 None-- 	
Joining date	Time	
		
LinkedIn Profile	Out Time	
		
Leave Days		
We hit a snag.		
Review the errors on this page.		
<ul style="list-style-type: none">Employee with same name is existing		
Review the following fields		
<ul style="list-style-type: none">Employee ID		
 Cancel	 Save & New	 Save