

## Phase 8: Data Management & Deployment

### Objective

To manage onboarding and training data effectively and ensure smooth deployment of project components from Sandbox to Production.

### Data Import (Employees, Tasks, Training Modules)

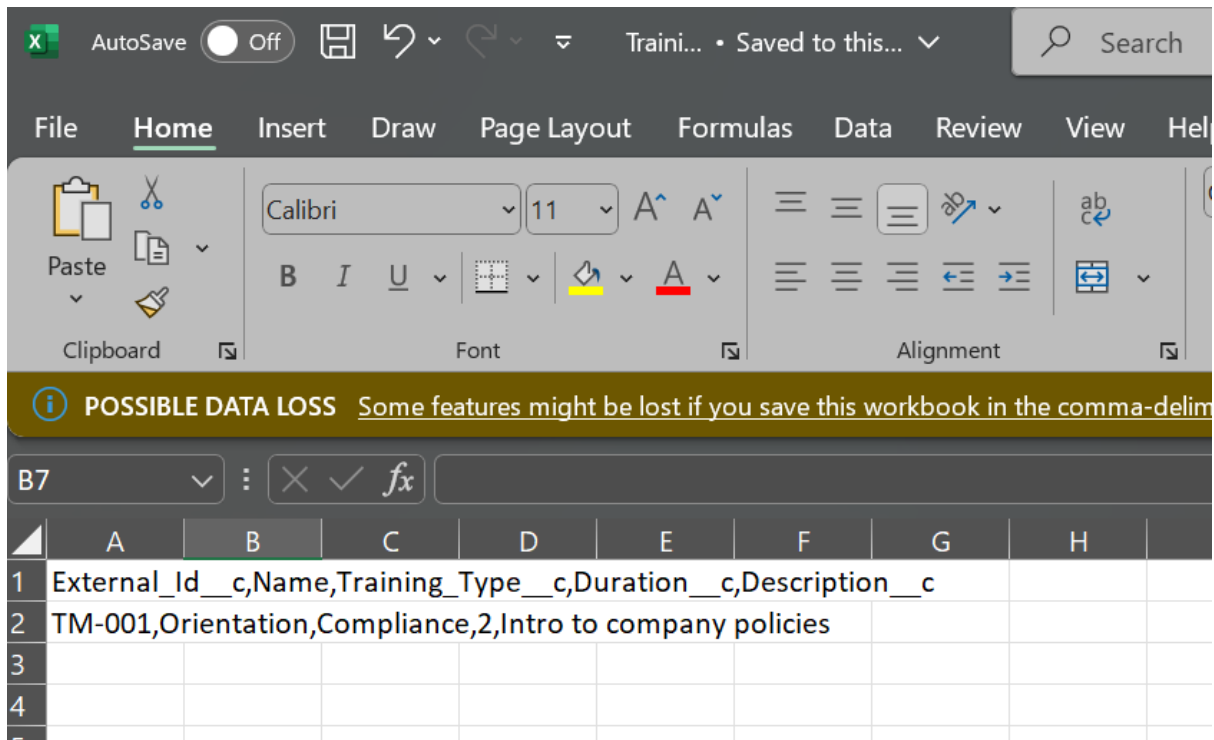
- Prepared CSV files for **Employees, Onboarding Tasks, Training Modules**.
- Used **Data Import Wizard** for small test batches.
- Used **Data Loader** for bulk upload.
- Verified success/error files and corrected any failed rows.

The screenshot shows the Salesforce Setup interface. At the top, there are tabs for Setup, Home, and Object Manager. Below the tabs, the breadcrumb trail reads 'SETUP > OBJECT MANAGER' and the page title is 'Employee'. On the left sidebar, under 'Fields & Relationships', the 'Details' section is selected. The main content area displays the 'Employee Custom Field' details for 'External Id'. It includes a 'Back to Employee' link and a 'Validation Rules (0)' indicator. The 'Custom Field Definition Detail' section has tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists the field's details:

Field Label	External Id	Object Name	Employee
Field Name	External_Id	Data Type	Text
API Name	External_Id__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Janaki Chandragiri, 9/30/2025, 10:34 PM	Modified By	Janaki Chandragiri, 9/30/2025, 10:34 PM

Below the table is the 'General Options' section.





## Data Export & Backup

- Scheduled weekly export for **Employee, Onboarding Task, Training Module, Employee Training Assignment**.
- Downloaded CSV backups for safe storage.

Great job

Choose data Edit mapping Start import

### Review & Start Import

Review your import information and click Start Import.

Help for this page

Your selections:

- Employees ✓
- Add new records ✓
- Employee.csv ✓

Your import will include:

Mapped fields

0

Your import will not include:

Unmapped fields

1

Cancel Previous Start Import

Great job

Choose data Edit mapping Start import

### Review & Start Import

Review your import information and click Start Import. [Help for this page](#)

Your selections:

- Training Modules ✓
- Add new records ✓
- Training.csv ✓

Your import **will include**:

Mapped fields

0

Your import **will not include**:

Unmapped fields

1

## Deployment with Change Sets

- Created **Outbound Change Set** in Sandbox with custom objects, fields, layouts, and Apex classes.
- Uploaded Change Set to Production.
- Validated and deployed successfully.

## Outcome of Phase 8

- All project data loaded successfully with parent-child relationships intact.
- Regular data backup configured.
- Metadata deployed to target org using Change Sets.