

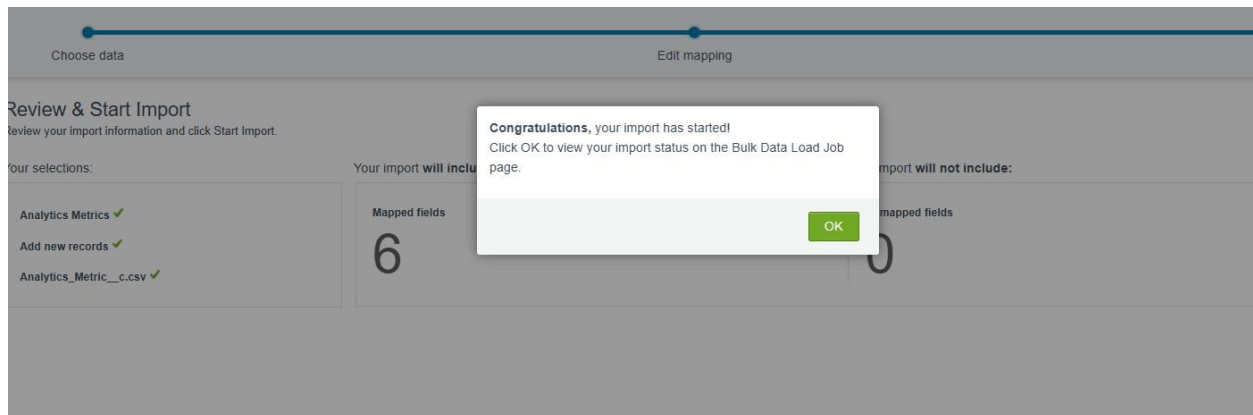
ERM Hybrid Workforce Project – Phase 8

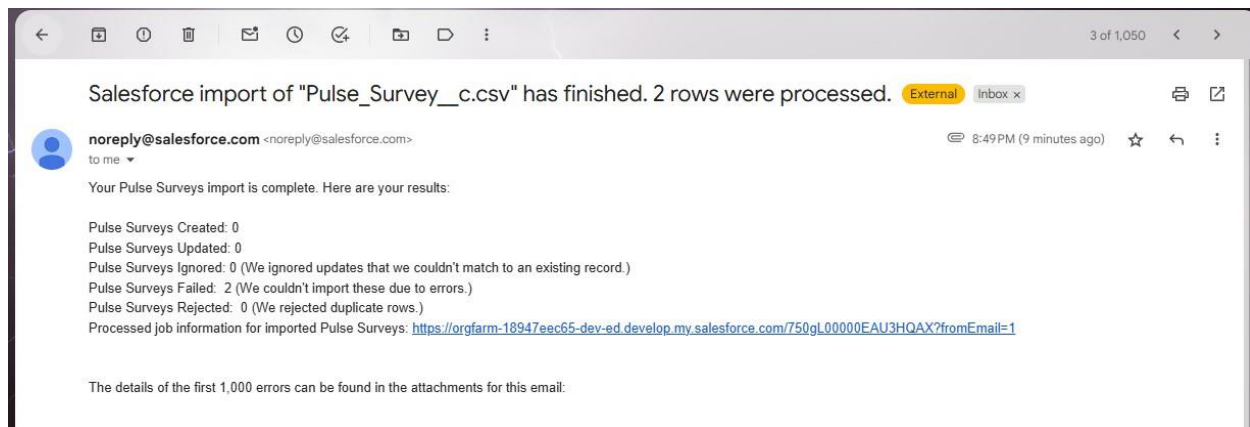
Phase 8: Data Management & Security Review

1. Data Management

Data Import Wizard

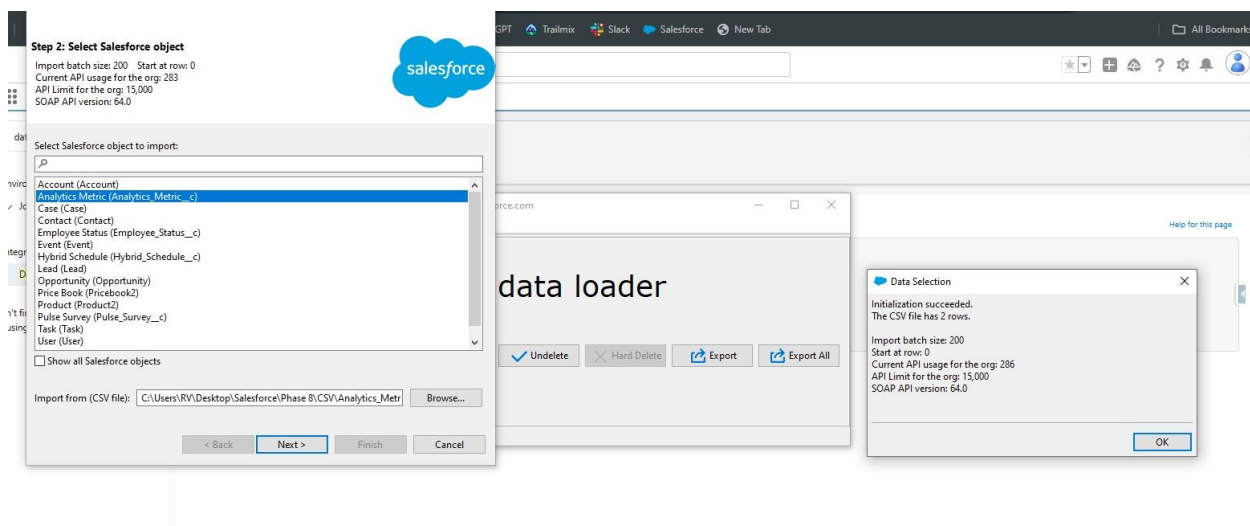
- A browser-based tool within Salesforce to **import records** for standard and custom objects.
- Used for:
 - Importing employee schedules, well-being alerts, survey responses.
 - Updating or adding multiple records simultaneously.
- **Steps for ERM project:**
 1. Navigate to **Setup** → **Data** → **Data Import Wizard**.
 2. Select the object (e.g., `Hybrid_Schedule__c`, `Pulse_Survey__c`).
 3. Upload the CSV file with proper field mapping.
 4. Start the import and verify results in Salesforce.





2. Data Loader

- A **client application** for bulk data operations.
- Can **insert, update, delete, or export** large volumes of records.
- **Use case for ERM project:**
 - Bulk import historical employee data.
 - Update metrics and analytics records.
 - Export data for reporting or backup.
- **Steps:**
 1. Launch Data Loader and log in to your Salesforce org.
 2. Choose the operation: Insert / Update / Upsert / Delete / Export.
 3. Select the object (e.g., Analytics_Metric__c).
 4. Map CSV fields to Salesforce fields.
 5. Execute the operation and check success/error files.



3. Duplicate Rules

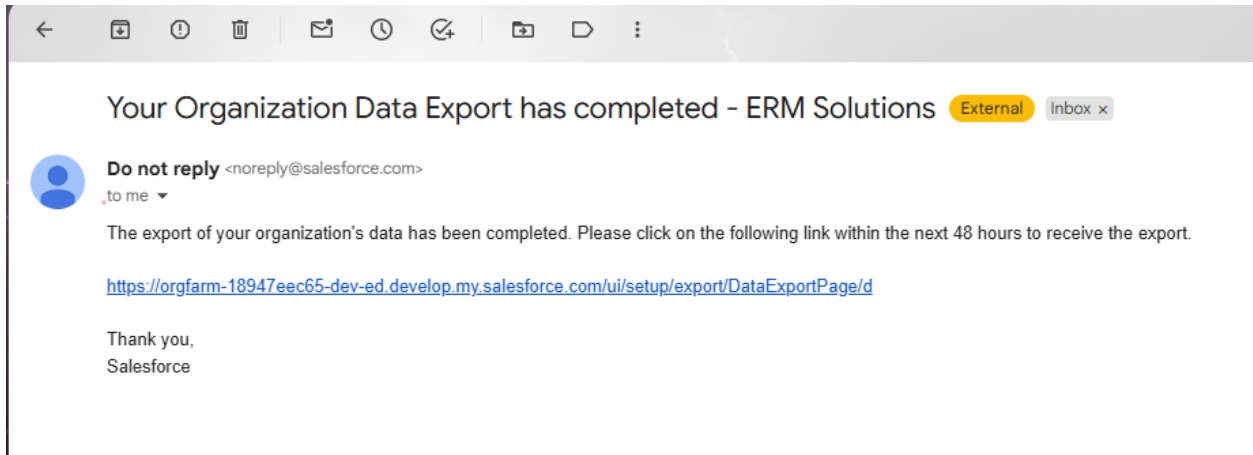
- Ensures **data quality** by preventing duplicate records.
- Configured for objects like `Employee_Status__c` and `Hybrid_Schedule__c`.
- **Key points for ERM project:**
 - Define **matching rules** to identify duplicates.
 - Activate **duplicate rules** to block or alert duplicates.
 - Test with sample records to verify functionality.

The screenshot shows the 'Duplicate Rules' configuration page in Salesforce. The page title is 'Duplicate Rules' under the 'SETUP' tab. The specific rule being configured is 'Employee_Status Duplicate Rule' for the object 'Employee__c'. The 'Duplicate Rule Detail' section includes fields for Rule Name, Description, Object, Record-Level Security, Action On Create, Action On Edit, Alert Text, Alert, Matching Rule, Matching Criteria, and Conditions. The 'Matching Rule' is set to 'Employee__c' and 'Matched'. The 'Matching Criteria' is '(Employee_Status: Name EXACT MatchBlank = FALSE) AND (Employee_Status: Status EXACT MatchBlank = FALSE)'. The 'Conditions' section shows the rule was created by 'Venkata Raju Sai R' on 9/29/2025 at 8:48 AM and modified by the same user on 9/29/2025 at 8:48 AM. There are buttons for 'Edit', 'Delete', 'Clone', and 'Deactivate'.

The screenshot shows the 'Matching Rules' configuration page in Salesforce. The page title is 'Matching Rules' under the 'SETUP' tab. The specific rule being configured is 'Employee__c'. The 'Matching Rule Detail' section includes fields for Object, Rule Name, Unique Name, Description, Matching Criteria, Status, and Created By. The 'Matching Criteria' is '(Employee_Status: Name EXACT MatchBlank = FALSE) AND (Employee_Status: Status EXACT MatchBlank = FALSE)'. The 'Status' is 'Active'. The 'Created By' is 'Venkata Raju Sai R' on 9/29/2025 at 8:43 AM. There are buttons for 'Delete', 'Clone', and 'Deactivate'.

4. Data Export & Backup

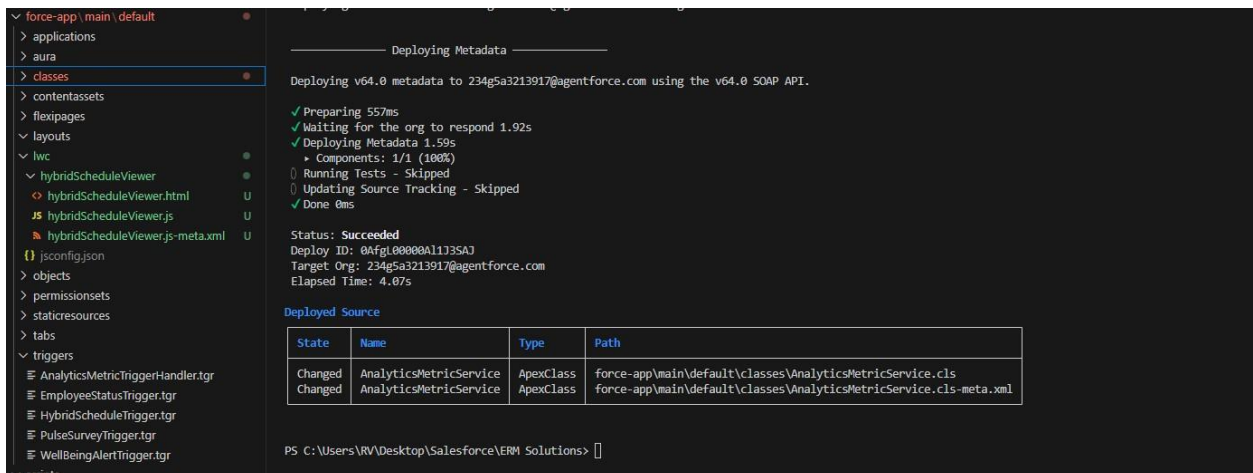
- Salesforce provides **native tools** for data backup:
 - **Data Export** (Setup → Data → Data Export): Export all standard and custom object data periodically.
 - **Weekly / Monthly Scheduled Exports** for compliance and disaster recovery.
- Recommended for ERM project:
 - Backup `Employee_Status__c`, `Pulse_Survey__c`, `Well_Being_Alert__c`, `Analytics_Metric__c`, and `Hybrid_Schedule__c`.
 - Store exports in secure cloud or local storage.



5. Deployment

VS Code & Salesforce DX (SFDX)

- **VS Code:** Primary IDE for Salesforce development.
- **SFDX:** Salesforce CLI for source-driven development and deployment.
- **Deployment Steps for ERM project:**
 1. Authenticate to target org:
 2. `sfdx auth:web:login --setalias ProdOrg --instanceurl https://login.salesforce.com`
 3. Deploy source from VS Code / CLI:
 4. `sfdx force:source:deploy --sourcepath force-app --targetusername ProdOrg`
 5. Verify deployment logs for errors or warnings.
 6. Assign permission sets if required:
 7. `sfdx force:user:permset:assign --targetusername ProdOrg --permsetname Employee`



Phase 8 Status: Completed Successfully

Next Steps:

- Proceed to **Phase 9: Reporting, Dashboards & Security Review**
- Begin testing Reports, Dashboards, Login IP Ranges... etc

Phase 8 Completion Document.
