

Workforce Administration Solution (Dev)

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Project Overview

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.

Objectives

Streamline Workforce Management: Implement a comprehensive solution to optimize workforce scheduling, tracking, and performance monitoring, ensuring efficiency and reducing administrative burdens.

Enhance Data Accuracy and Compliance: Improve the accuracy of employee data and ensure adherence to labor laws, policies, and company regulations through automated compliance checks and reporting.

Increase Employee Engagement: Foster a transparent communication platform for employees, allowing them to access schedules, requests, and feedback, improving overall engagement and satisfaction.

- **Boost Productivity:** Leverage real-time data insights to identify operational bottlenecks and implement strategies that enhance employee productivity and task allocation.

- **Cost Optimization:** Reduce operational costs associated with manual processes, overtime, and inefficient resource allocation by automating key workforce management functions.

- **scalable Integration:** Ensure the solution is scalable and integrates

seamlessly with existing enterprise systems (HR, payroll, etc.) to support growth and future needs.

Specific Outcomes:

- **Improved Efficiency:** Automation of scheduling, tracking, and reporting processes will significantly reduce manual tasks and enhance operational efficiency.
- **Enhanced Compliance and Accuracy:** The solution ensures consistent adherence to labour laws and company policies while providing accurate employee data management.
- **Better Decision-Making:** Real-time insights and data analytics will enable managers to make informed decisions, optimizing resource allocation and improving overall workforce performance

Salesforce Key Features and Concepts Utilized

- salesforce's **Workforce Management** features like **Employee Management** and **Scheduling** streamline workforce operations with automated workflows and real-time data insights. Additionally, **Salesforce Service Cloud** and **Salesforce Analytics** enable seamless communication, compliance tracking, and data-driven decision making.

Detailed Steps

Task 1 : Activity 1: Creating Developer Account

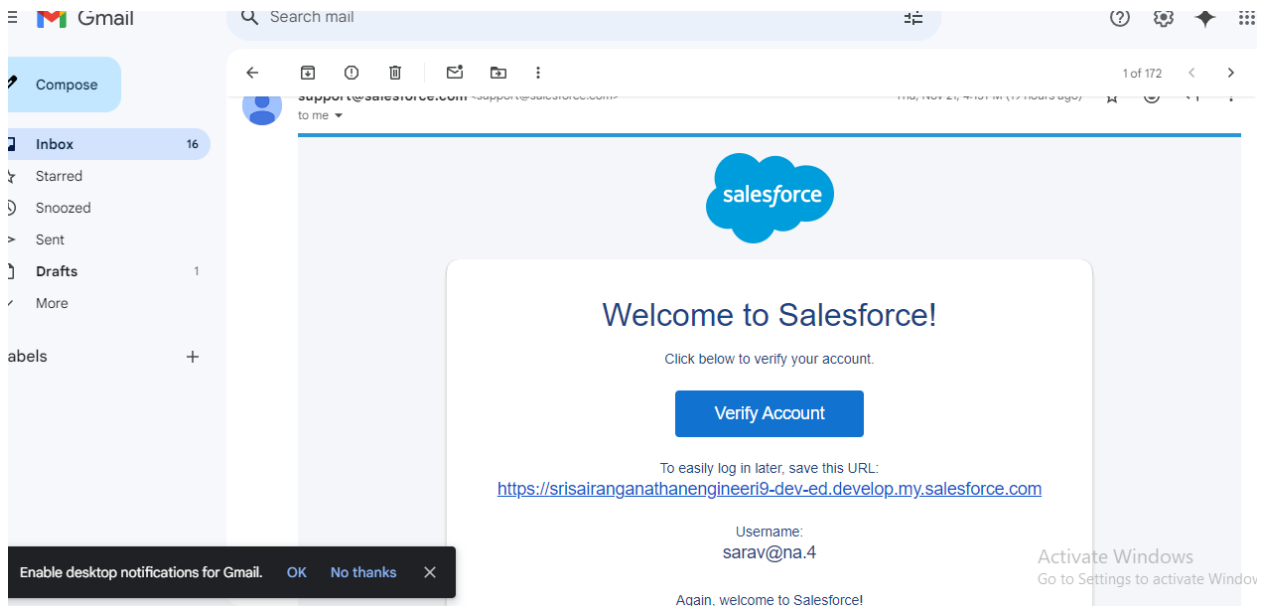
- Go to <https://developer.salesforce.com/signup>.

On the sign up form, enter the required details

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account

Activity 2: Account Activation

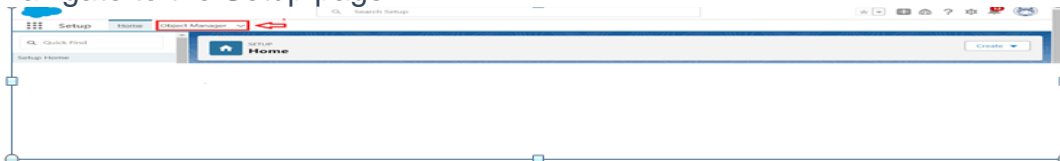
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.



Task 2 : Object

Activity 1: Create an Employee object

Navigate to the Setup page



To create an object:

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

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

SETUP
New Custom Object

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label [Example: Account] 1

Plural Label [Example: Accounts] 2

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name [Example: Account] 2

Description

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name: [None]

Enter Record Name Label and Format

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

Record Name [Example: Account Name] 3

Data Type: Text 4

Optional Features

☒ Allow Reports 5

☐ Allow Activities

☐ Track Field History

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

Task 2 a : Create project Object

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
 - Plural label name >> projects

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

Task 2 b : **ProjectTask**

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 >> ProjectTask
 2. Plural label name>> ProjectTasks
 3. Enter Record Name, Label, and Format
 - Record Name >> ProjectTask
 - Data Type >> Text
2. Click on Allow reports and Track Field History,Allow Activities
3. Allow search >> Save.

Task 2 c : **Create Asset Object**

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
 2. Plural label name>> Assets
 3. Enter Record Name, Label, and Format
 - Record Name >> Asset
 - Data Type >> Text
2. Click on Allow reports and Track Field History,Allow Activities
3. Allow search >> Save.

Task 2 d : Create AssetService Object

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 Service
 3. Enter Record Name, Label, and Format
 - Record Name >> Asset Service
 - Data Type >> Text
2. Click on Allow reports and Track Field History,Allow Activities
3. Allow search >> Save.

Task 3 : Tabs

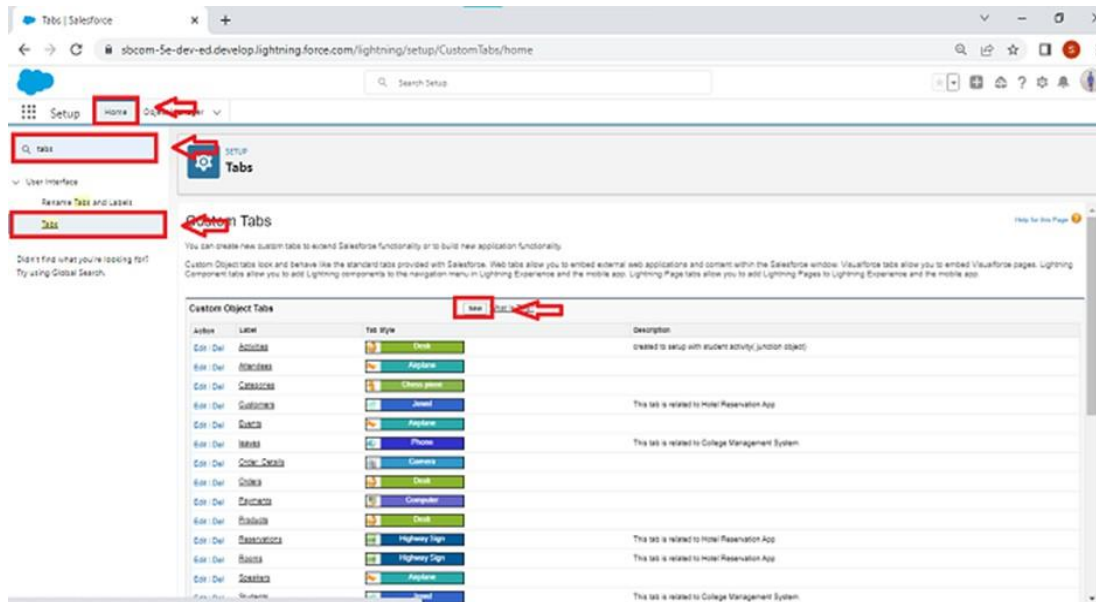
What is Tab :

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Creating a Custom Tab

To create a Tab:(Employee)

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



1. Select Object(Employee) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
2. Make sure that the Append tab to users' existing personal customizations is checked.
3. Click save

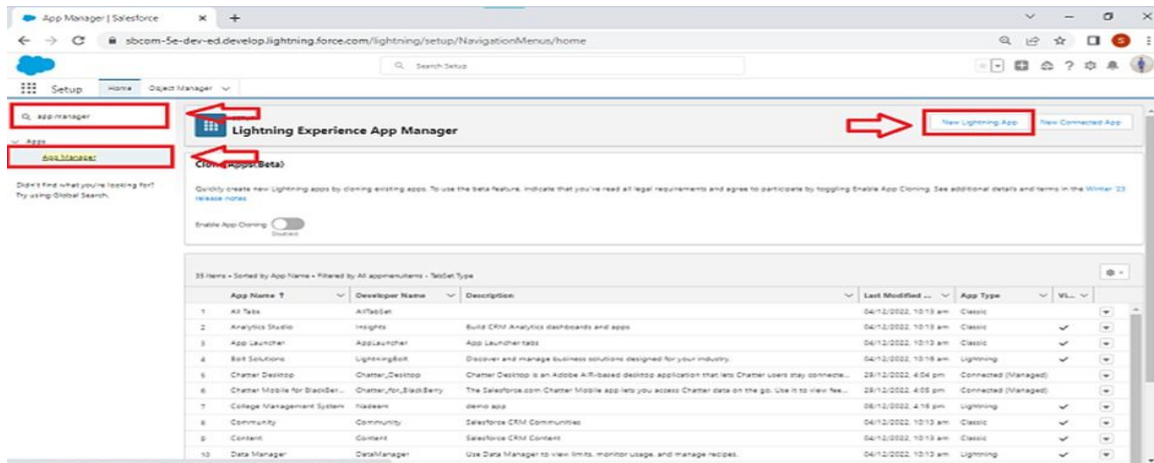
Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects; they are "Project, Project Task, Asset, Asset Service " .
2. Follow the same steps as mentioned above in creating a custom tab.

Task 4 : The Lightning App

To create a lightning app page:

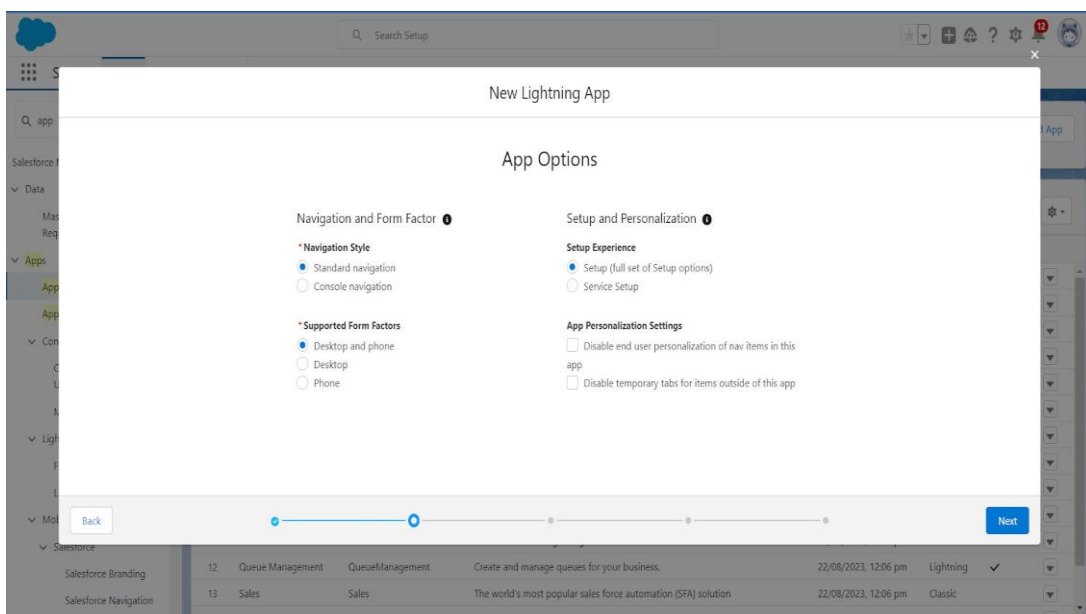
1. Go to the setup page >> search "app manager" in quick find >> select "app manager" >> click on New lightning App.



2. Fill the app name in app details and branding as follow
 App Name : Workforce Administrator Solution, Developer Name : This will auto be populated

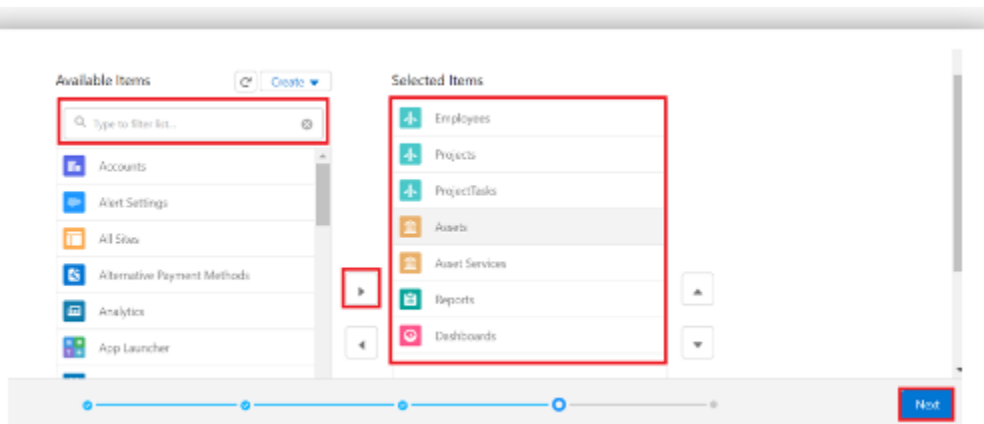
, Image : optional (if you want to give any image, you can otherwise not mandatory), Primary color hex value : keep this default.

3. Then click Next >> (App option page) Set Navigation Style as Standard Navigation >> Next.



4. (Utility Items) keep it as default >> Next.

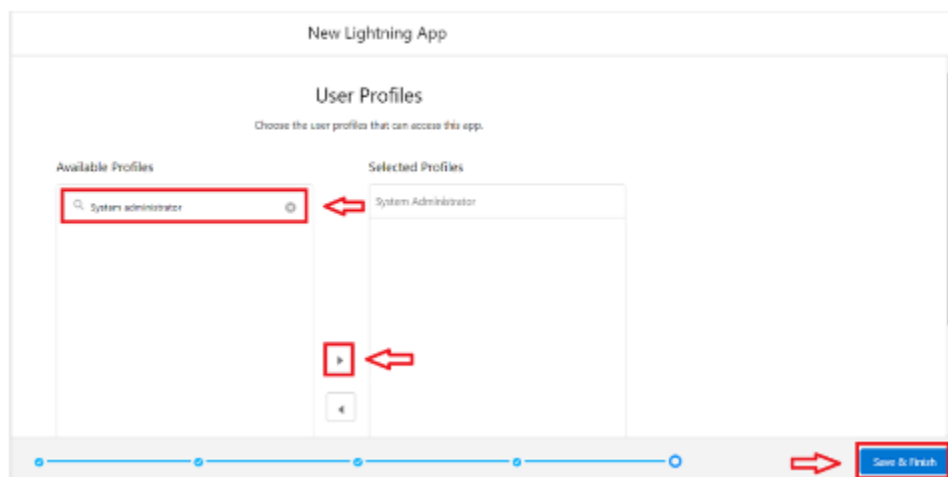
5. To Add Navigation Items:



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.

To Add User Profiles:

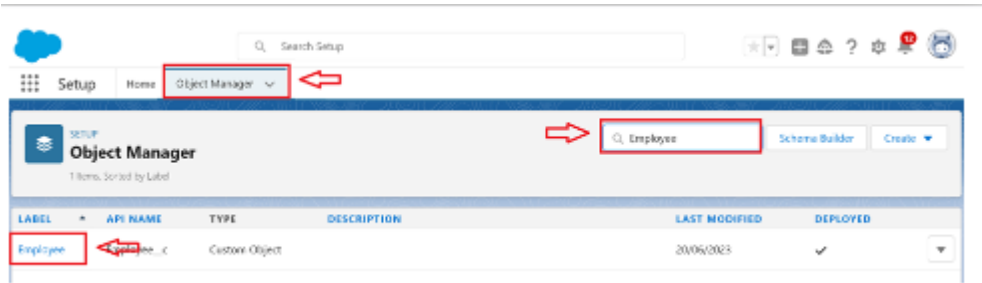


Search profiles (System administrator) in the search bar --> click on the arrow button -->save & finish

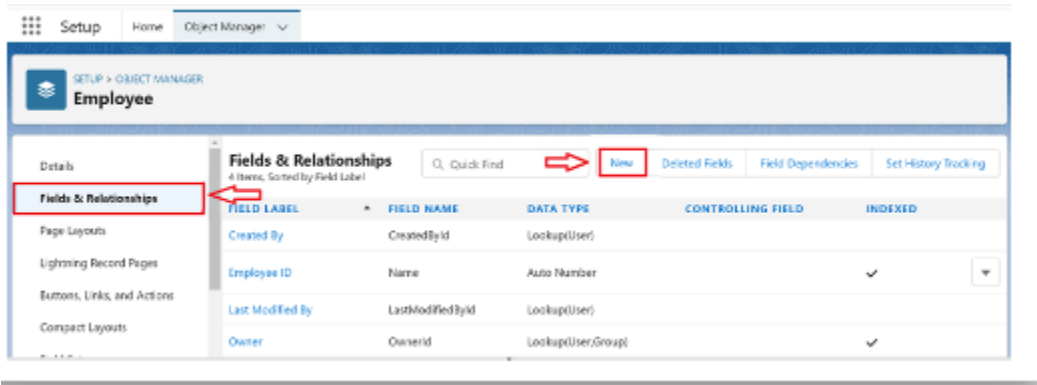
Task 5 : Fields

Task 5 a : Creating Text Field In Employee Object

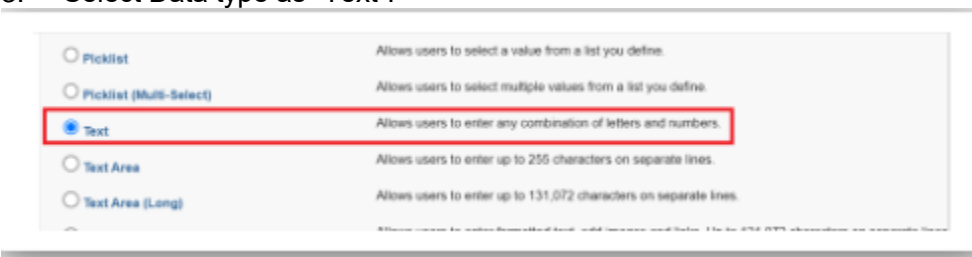
1. Go to setup >> click on Object Manager >> type object name(Employee) in the search bar >> click on the object.



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.

Task 5 b : 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.

<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 checked="" 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 email.

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.

Task 5 c: 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

Field Label: Age

Field Name: Age

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

Formula Return Type

☒ None selected

☐ Boolean

☐ Currency

☐ Date

☐ Date/Time

☒ Number

4. 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

YEAR(TODAY() - YEAR(Date_of_Birth))

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

Description

Quick Tip

- Getting Started
- Operators & Functions

Functions

All Function Categories

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

Task 5 d: 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:

Previous **Next** Cancel

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

Task 5 E: 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.

Employee

New Relationship

Step 2: Choose the related object

Select the other object to which this object is related.

Related To: Employee

Previous **Next** Cancel

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

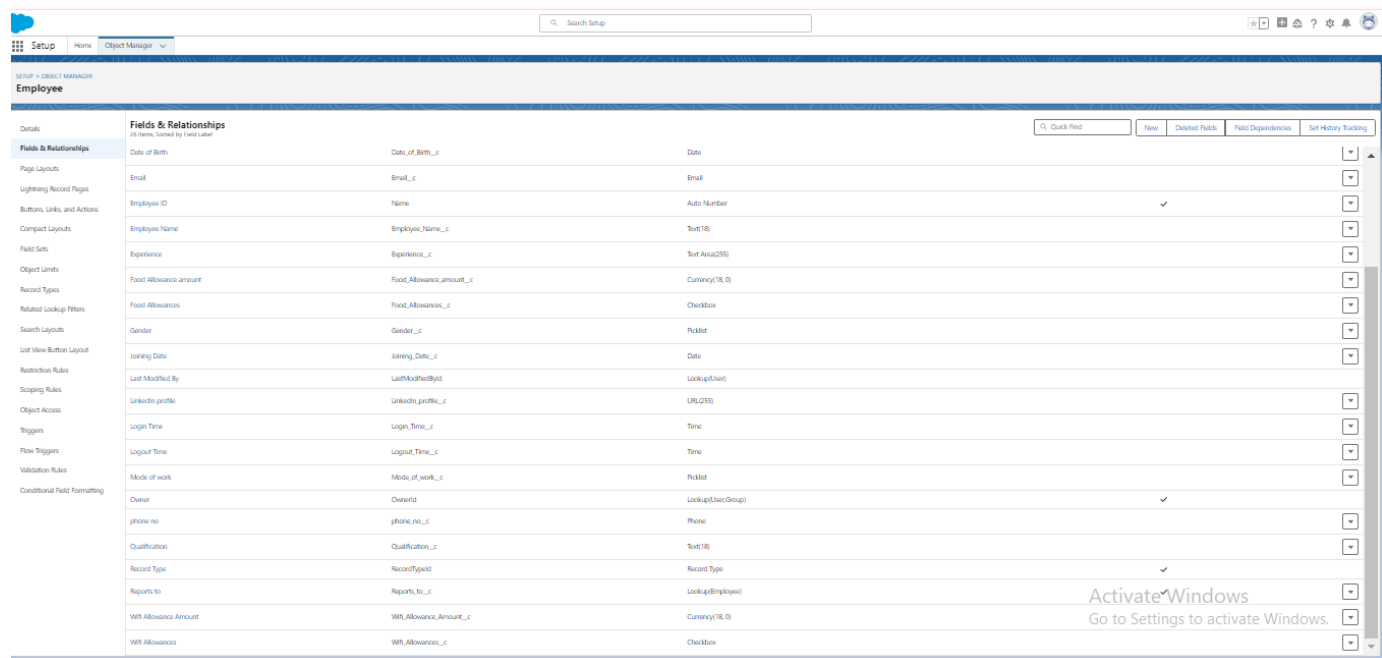
Task 5 F: Creating Master-Detail Relationship Between Employee & Asset Object

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.

Task 5 G : Creating Remaining Fields In Employee Object

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



Fields & Relationships	Field Label	Field Name	Data Type
Date of Birth	Date of Birth_c	Date	Date
Email	Email_c	Email	Email
Employee ID	Name	Auto Number	Auto Number
Employee Name	Employee Name_c	Text(18)	Text(18)
Experience	Experience_c	Text Area(255)	Text Area(255)
Food Allowance amount	Food Allowance amount_c	Currency(18,0)	Currency(18,0)
Food Allowances	Food Allowances_c	Checkbox	Checkbox
Gender	Gender_c	Picklist	Picklist
Joining Date	Joining Date_c	Date	Date
Last Modified By	LastModifiedById	Lookup(User)	Lookup(User)
LinkedIn profile	LinkedIn profile_c	URL(255)	URL(255)
Login Time	Login Time_c	Time	Time
Logout Time	Logout Time_c	Time	Time
Mode of work	Mode of work_c	Picklist	Picklist
Owner	OwnerId	Lookup(User Group)	Lookup(User Group)
phone no	phone no_c	Phone	Phone
Qualification	Qualification_c	Text(18)	Text(18)
Record Type	RecordTypeId	Record Type	Record Type
Reports to	Reports to_c	Lookup(Employee)	Lookup(Employee)
WF Allowance Amount	WF Allowance Amount_c	Currency(18,0)	Currency(18,0)
WF Allowances	WF Allowances_c	Checkbox	Checkbox

All fields are added .

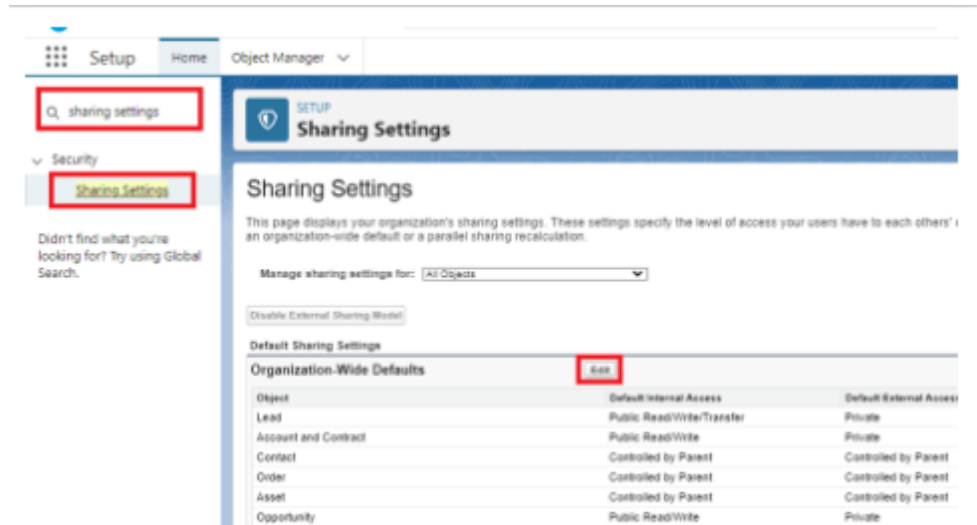
Setting OWD

Data is the most precious thing of any organization and keeping it safe is the first most priority of any Admin in the organization. As an Admin, to ensure data privacy and

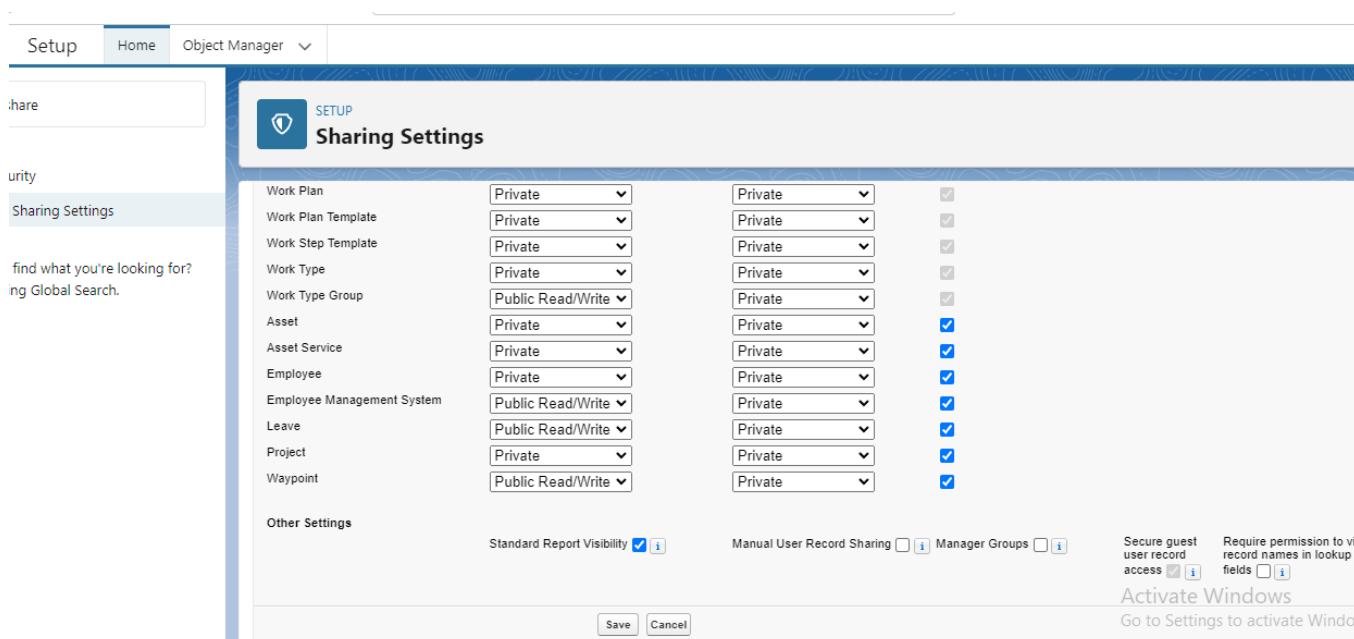
compliance with regulations, you need to restrict access to sensitive customer information using OWD.

Task 6 a :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



1. Search for the Employee object.
2. Under default internal access and default external access change the options to "Private" and under grant access using hierarchies select the check box.
3. Click on save.



1. This Setting is for all the Users Which have been Created.

Task 6 b: Set OWD as Private for Project and Asset Service objects.

Setup

Home

Object Manager

Share

Security

Sharing Settings

Find what you're looking for? Try Global Search.

SETUP

Sharing Settings

Work Plan	Private	Private	<input checked="" type="checkbox"/>
Work Plan Template	Private	Private	<input checked="" type="checkbox"/>
Work Step Template	Private	Private	<input checked="" type="checkbox"/>
Work Type	Private	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Asset	Private	Private	<input checked="" type="checkbox"/>
Asset Service	Private	Private	<input checked="" type="checkbox"/>
Employee	Private	Private	<input checked="" type="checkbox"/>
Employee Management System	Public Read/Write	Private	<input checked="" type="checkbox"/>
Leave	Public Read/Write	Private	<input checked="" type="checkbox"/>
Project	Private	Private	<input checked="" type="checkbox"/>
Waypoint	Public Read/Write	Private	<input checked="" type="checkbox"/>

Other Settings

Standard Report Visibility

☒

Manual User Record Sharing

☐

Manager Groups

☐

Secure guest user record access

☒

Require permission to view record names in lookup fields

☐

Activate Windows

Go to Settings to activate Windows.

Save

Cancel

This Setting is for all the Users Which have been Created.

User Adoption

Task 7 a: Create A Record (Employee)

1. Click on App Launcher on the left side of the screen.

2. Search Employee Management System & click on it.

Cloud Icon

Search Setup

Star

Plus

Refresh

Help

Settings

Logout

Setup

Home

Object Manager

App Launcher

emp

Apps

No results

Items

Email Templates

Employees

Expression Set Templates

Work Plan Templates

Work Step Templates

View All

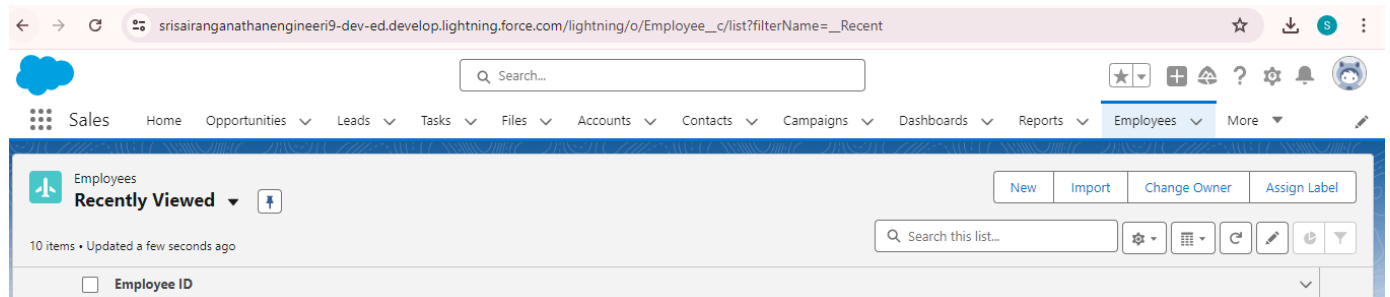
PI NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Standard Object			
Activity	Standard Object			
Address	Standard Object			
AlternativePaymentMethod	Standard Object			
ApiAnomalyEventStore	Standard Object			
AppointmentCategory	Standard Object			
Appointment Invitation	Standard Object			
Appointment Invitee	Standard Object			
Appointment Topic Time Slot	Standard Object			
Asset	Custom Object			

Activate Windows

13/11/2024

Settings to activate Windows

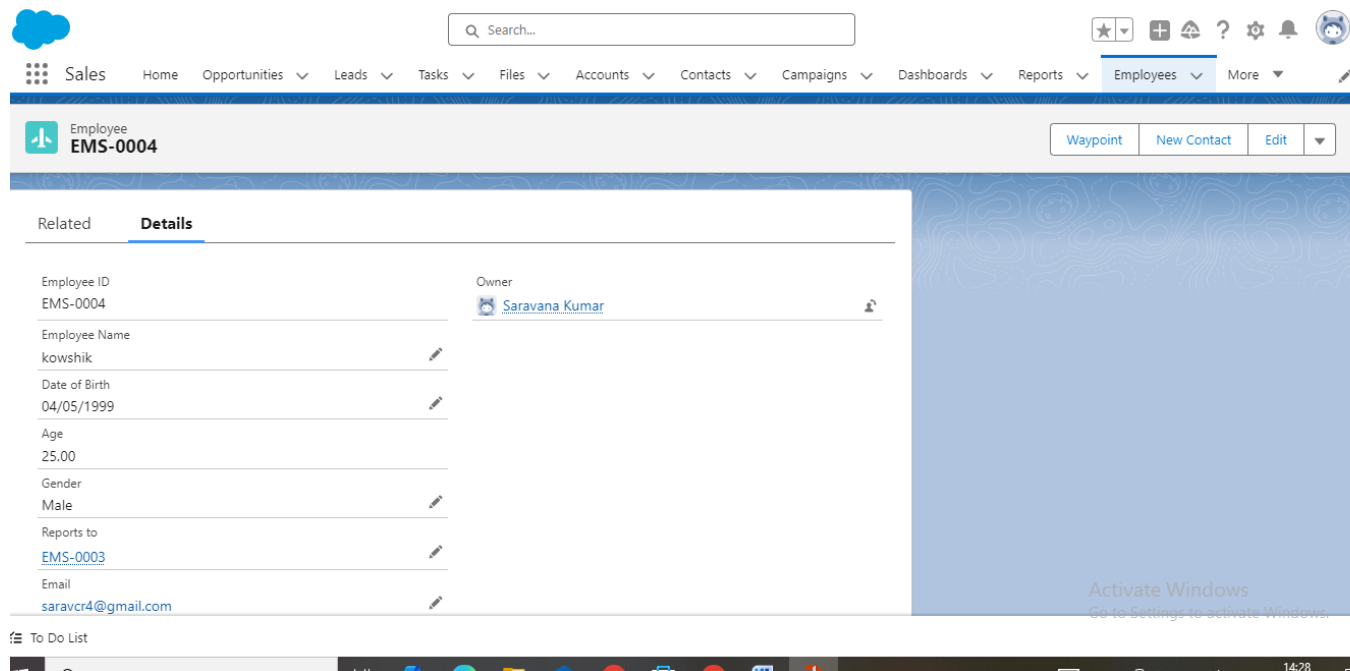
1. Click on the Employee tab.
2. Click New.



Fill the Details and click on Save

Task 7 b: View A Record (Employee)

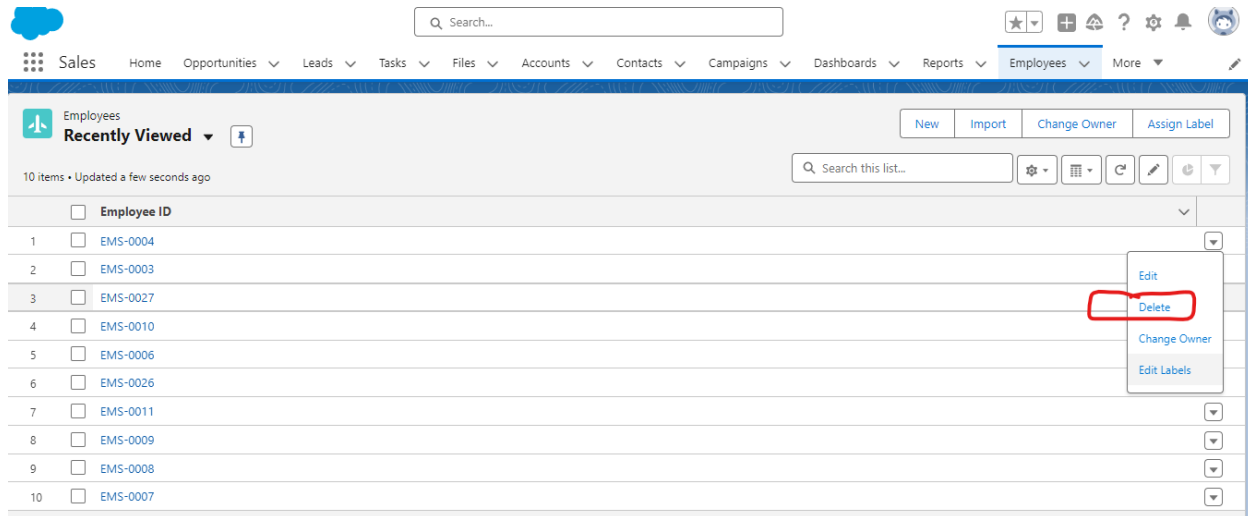
1. Click on App Launcher on the left side of the screen.
2. Search Employee Management System & click on it.
3. Click on the Employee Tab.



4. Click on any record name. you can see the details of the Employee

Task 7 c: Delete A Record (Employee)

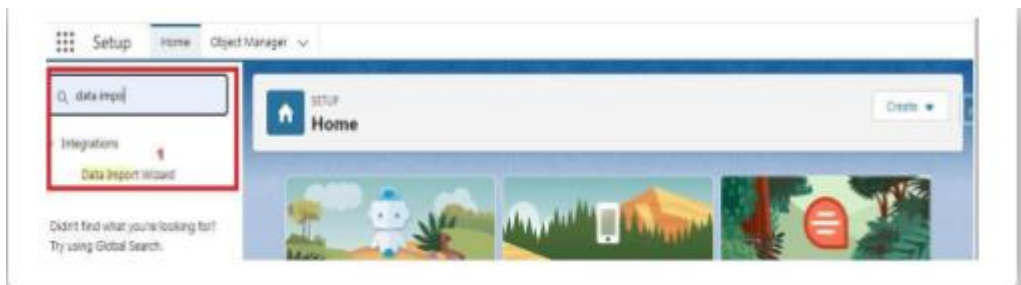
1. Click on App Launcher on the left side of the screen.
2. Search Employee Management System & click on it.
3. Click on the Employee Tab.



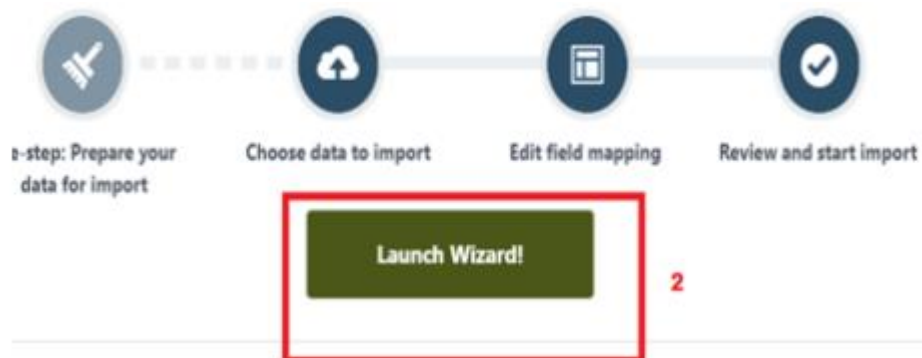
- 4.
5. Click on Arrow at right hand side on that Particular record.
6. Click delete.

Task 8: Importing Data Using Data Wizard

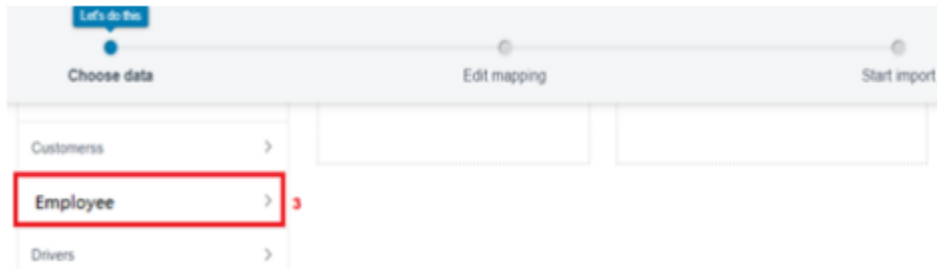
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



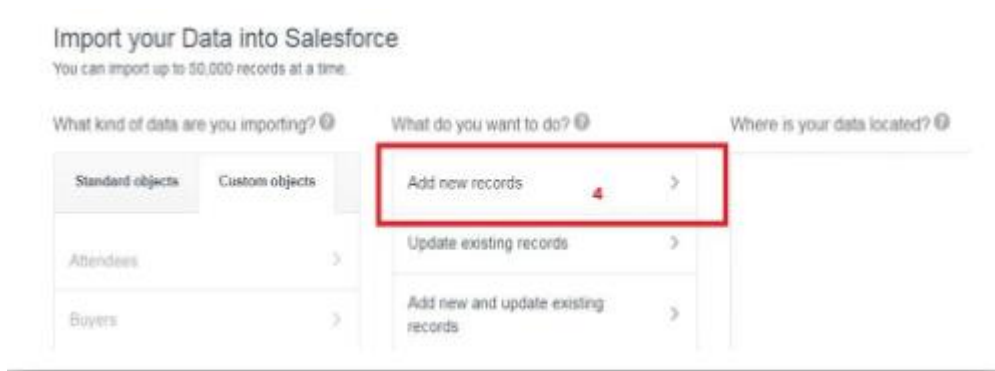
Click Launch Wizard!



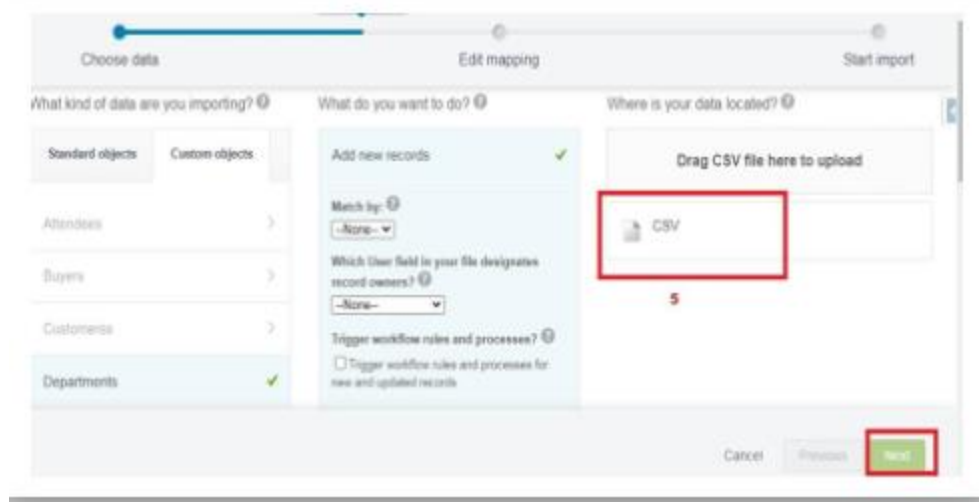
Click the Custom Objects tab and select the Employee object.



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.

Edit	Map to Reference Object	SAP Answer	Example	Example	Example
Change	Employee Name	Employee Name	Jakob Chai	Jakob	Jakob
Change	Date of Birth	Date of Birth	01/01/1980	27/02/1980	16/02/1980
Change	Gender	Gender	Male	Male	Male
Change	Qualification	Qualification	0.7611	0.7611	0.7611
Change	Address	Address			
Change	Telephone	Telephone	0	0	0
Change	Mobile No	Mobile No	7990000100	7990000100	7990000100

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

Review & Start Import
Review your import information and click Start Import.

Your selection:

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

Your import will include:

Mapped fields: **19**

Your import will not include:

Unmapped fields: **0**

Click OK on the popup.

Congratulations, your import has started!
Click OK to view your import status on the Bulk Data Load Job page.

OK

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

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (min)	BPI/Bulk Processing Time (min)	Appl. Processing Time (min)	Records Processed	Records Failed	Retry Count	Data Message	Status
View Request	View Result	7515000000000000	14/06/2023, 11:54 am	14/06/2023, 11:54 am	100	80	0	1	0	0		Completed

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

Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

- 1 Contract Manager
- 2 Read Only
- 3 Marketing User
- 4 Solutions Manager
- 5 Standard User
- 6 System Administrator.

We cannot delete standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. Custom Profiles:

Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.

Task 9a: 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.

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text" value="HR"/>

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 object

Setup Home Object Manager

Q prof

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Individuals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inventory Reservations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Work Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Type Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

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

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Leaves	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ProjectTasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Waypoints	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Search Setup

Setup Home Object Manager

Q prof

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Profiles

All Profiles Edit Delete Create New View

New Profile

Action	Profile Name	User License	Custom
Edit Clone	High Volume Customer Portal User	High Volume Customer Portal	<input type="checkbox"/>
Edit Del ...	HR	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	HUMANRESOURCES	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Identity User	Identity	<input type="checkbox"/>
Edit Del ...	Manager	Salesforce Platform	<input checked="" type="checkbox"/>
Edit Clone	Marketing User	Salesforce	<input type="checkbox"/>
Edit Clone	Minimum Access - API Only Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
Edit Del ...	On Site Employee	Salesforce Platform	<input checked="" type="checkbox"/>
Edit Clone	Partner App Subscription User	Partner App Subscription	<input type="checkbox"/>

26-46 of 46 0 Selected

Previous Next

Activate Windows
Go to Settings to activate Windows.

Page 2 of 2

Scroll down and Click on Save.

Task 9 b: 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.

The screenshot shows the Salesforce Setup Profiles page. The left sidebar has a search bar with 'prof' and a list of items including 'Profiles'. The main content area is titled 'Profiles' and shows a table of permissions for the 'Manager' profile. The table is divided into two sections: 'Custom Object Permissions' and 'Standard Object Permissions'. The 'Custom Object Permissions' section has two columns: 'Basic Access' and 'Data Administration'. The 'Basic Access' column has sub-columns: Read, Create, Edit, Delete. The 'Data Administration' column has sub-columns: View All, Modify All. The 'Standard Object Permissions' section has two columns: 'Basic Access' and 'Data Administration'. The 'Basic Access' column has sub-columns: Read, Create, Edit, Delete. The 'Data Administration' column has sub-columns: View All, Modify All. The table lists the following objects: Assets, Asset Services, Employees, Leaves, Projects, and ProjectTasks. The permissions for the 'Manager' profile are as follows:

Object	Read	Create	Edit	Delete	View All	Modify All
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asset Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employees	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Leaves	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projects	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ProjectTasks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

3. Scroll down and Click on Save.

Task 9 C: 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.

The screenshot shows the Salesforce Setup Profiles page for a profile named 'Employee'. The left sidebar has a search bar with 'prof' and a list of items including 'Profiles'. The main content area is titled 'Profiles' and shows a table of permissions for the 'Employee' profile. The table is divided into two sections: 'Custom Object Permissions' and 'Standard Object Permissions'. The 'Custom Object Permissions' section has two columns: 'Basic Access' and 'Data Administration'. The 'Basic Access' column has sub-columns: Read, Create, Edit, Delete. The 'Data Administration' column has sub-columns: View All, Modify All. The 'Standard Object Permissions' section has two columns: 'Basic Access' and 'Data Administration'. The 'Basic Access' column has sub-columns: Read, Create, Edit, Delete. The 'Data Administration' column has sub-columns: View All, Modify All. The table lists the following objects: Assets, Asset Services, Employees, Leaves, Projects, and ProjectTasks. The permissions for the 'Employee' profile are as follows:

Object	Read	Create	Edit	Delete	View All	Modify All
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asset Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employees	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Leaves	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projects	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ProjectTasks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

DONE.

Task 10 a: Creating HR Role

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



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



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

5. Refer the below diagram to understand which role reports to which role.

Task 10 b: Creating More Roles

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

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

Roles			
NEW USER			
Show in list view			
Action	Role	Reports To	Report Display Name
Edit Del Assign	CEO		CEO
Edit Del Assign	CFO	CEO	CFO
Edit Del Assign	COO	CEO	COO
Edit Del Assign	HR	CEO	HR
Edit Del Assign	Manager	CEO	Manager
Edit Del Assign	HYBIRD EMPLOYEE	Manager	Employee
Edit Del Assign	On Site Employee	Manager	Employee1
Edit Del Assign	Remote Employee	Manager	Employee2

Done.

Task 11 a. Users

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' setup page in Salesforce. The 'General Information' section is highlighted with a red box, containing the following fields:

- First Name: Niklaus
- Last Name: Mikaelson
- Alias: mika
- Email: niklaus@univille.com
- Username: niklaus
- Title: (empty)
- Company: (empty)
- Department: (empty)
- Division: (empty)

The 'Role' dropdown is also highlighted with a red box, showing 'HR' selected. Other sections visible include 'User License' (Salesforce) and 'Profile' (HR).

Save.

Task 11 b: 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 : Mikelson
 - 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

The screenshot shows the 'User Edit' form in Salesforce. The user being edited is 'Kol Mikelson'. The form is divided into two main sections: 'General Information' and 'User License'. The 'General Information' section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'User License' section includes fields for Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, and Site.com Publisher User. The 'Active' checkbox is checked. The 'Role' is set to 'Manager', 'User License' is 'Salesforce Platform', and 'Profile' is 'Manager'. The 'Save' button is visible at the top of the form.

User Edit	
First Name	Kol
Last Name	Mikelson
Alias	Alias
Email	saravcr4@gmail.com
Username	krish@3.rk
Nickname	TIGER
Title	
Company	
Department	
Division	
Role	Manager
User License	Salesforce Platform
Profile	Manager
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>

3. Save.

Task 11 b: Creating More Users

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

SETUP

Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users [Edit](#) [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other | All

New User

Reset Password(s)

Add Multiple Users

Action	Full Name ↑	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00ddm0000acndnuaf.s58e6uqpm95@chatter.salesforce.com		✓	Chatter Free User
Edit	krish_ram	rkris	mano@43.vb	Remote Employee	✓	Remote Employee
Edit	Kumar Saravana	SKuma	saravanacr4@gmail.com		✓	System Administrator
Edit	Mikelson_Koi	Alias	krish@3.rk	Manager	✓	Manager
Edit	Mikelson_Niklaus	Alias	sarav@na.4	HR	✓	HR
Edit	User_Integration	integ	integration@00ddm0000acndnuaf.com		✓	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00ddm0000acndnuaf.com		✓	Analytics Cloud Security User
Edit	WHEELER_LOKI	ALIAS	rocky@45.ca	On Site Employee	✓	On Site Employee

New User

Reset Password(s)

Add Multiple Users

Activate Windows

Done.

Task 12 a: 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.

Setup

Home

Object Manager

Object Manager

Employee

Create

NAME	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	EMPLOYEE
Employee	Employee__c	Custom Object		31/08/2023	✓

+

+

+

Click on Page layout --> Click on New

SETUP

OBJECT MANAGER

Employee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Page Layouts

1 item, Sorted by Page Layout Name

PAGE LAYOUT NAME

CREATED BY

MODIFIED BY

Employee Layout	Nick, 28/08/2023, 7:04 pm	Nick, 31/08/2023, 11:01 am
-----------------	---------------------------	----------------------------

Quick Find

New

Page Layout Assignment

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

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 sta

Existing Page Layout: **Employee Layout**

Page Layout Name: **On Site Employee Layout**

Save **Cancel**

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.

Tools: Quick Save | Preview As... | Cancel | Undo | Redo | Layout Properties

Quick Find | Find Name

Fields

Buttons	Cash Allowance	Email	Food Allowance Am...	Last Modified By	Mode of Work	Reports To
Quick Actions	Cash Allowance Amount	Employee ID	Food Allowances	Lookup Profile	Owner	Web Allowance Am...
Mobile & Lightning Actions	Created By	Employee Name	Gender	Login Time	Phone no	Web Allowances
Expanded Linkage	Age	Date of Birth	Experience	Joining Date	Logout Time	Qualification
Related Lists						
Report Charts						

Information (Viewer mode is not supported)

Employee ID	0274-2004-021234	Owner	Sample Text
Employee Name	Sample Text	Reports To	Sample Text
Gender	Sample Text	Qualification	Sample Text
Experience	Sample Text	Phone no	1-415-555-1212
Email	sample.sample@company.com	Mode of Work	Sample Text
Joining date	21/06/2023	Login Time	Sample Text
Lookup Profile	www.salesforce.com	Logout Time	Sample Text

Personal Information

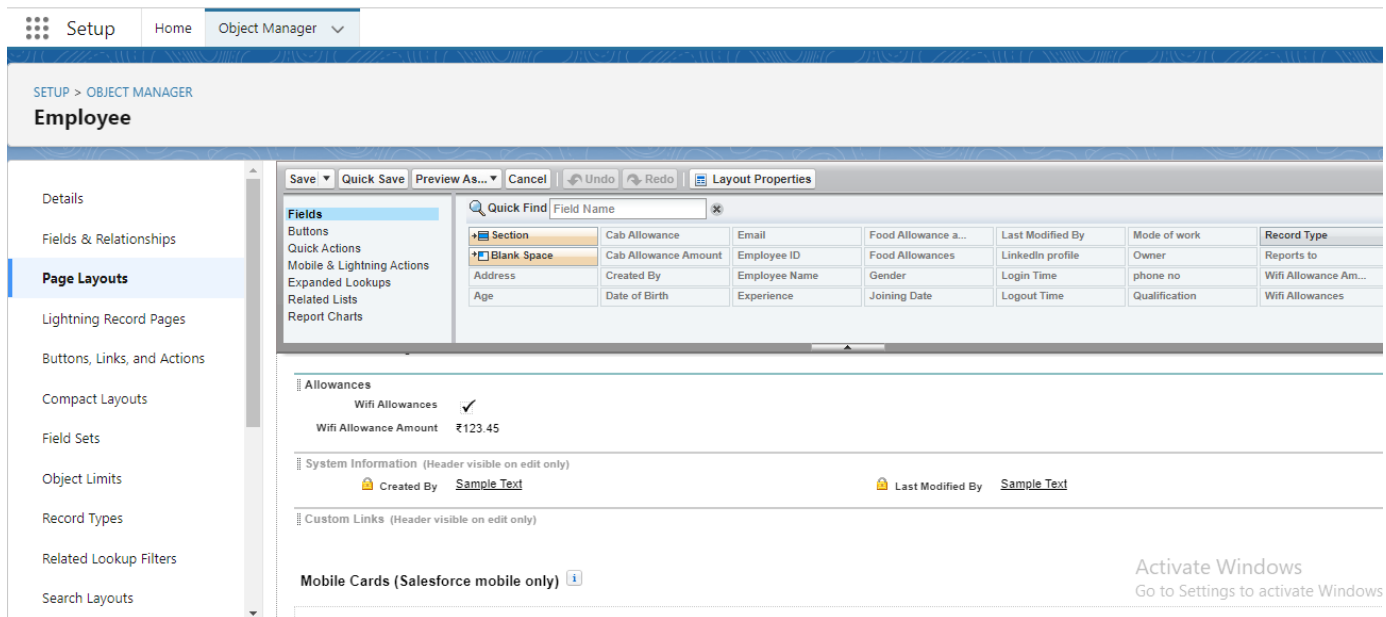
Date of Birth	21/06/2023	Age	30.12
Address	Sample Text		

Allowances

Cash Allowance	✓	Cash Allowance Amount	€123.45
Food Allowances	✓	Food Allowance Amount	€123.45

7. Click Save.
8. Make sure your page layout looks like the picture above.

Task 12 b: Creating Another Page Layout

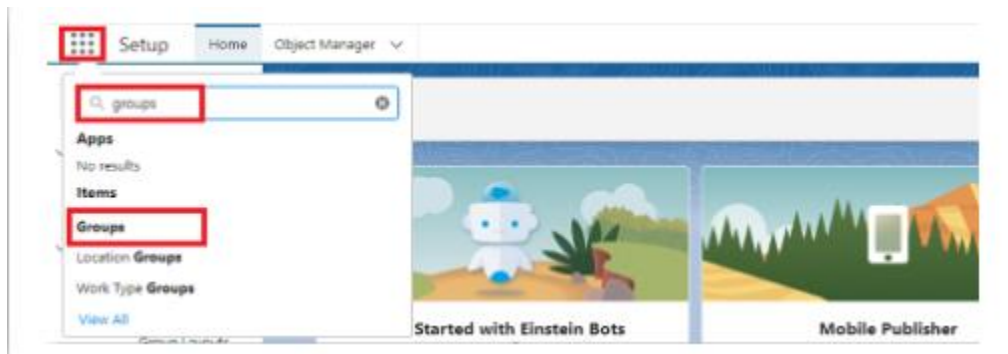


Done.

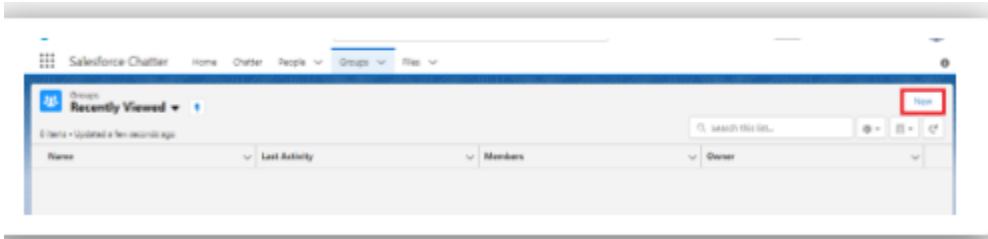
Task 13 a: Creating A Chatter Group For Your Organization.

To Create a chatter group:

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

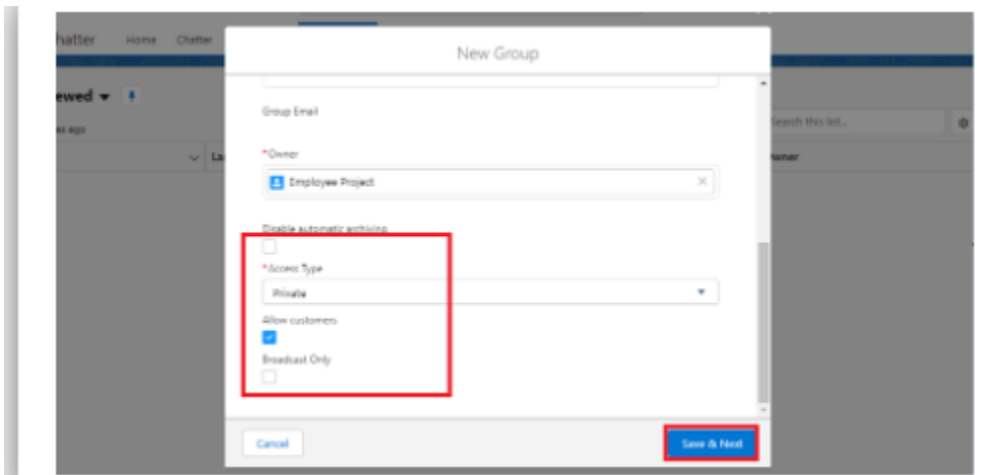
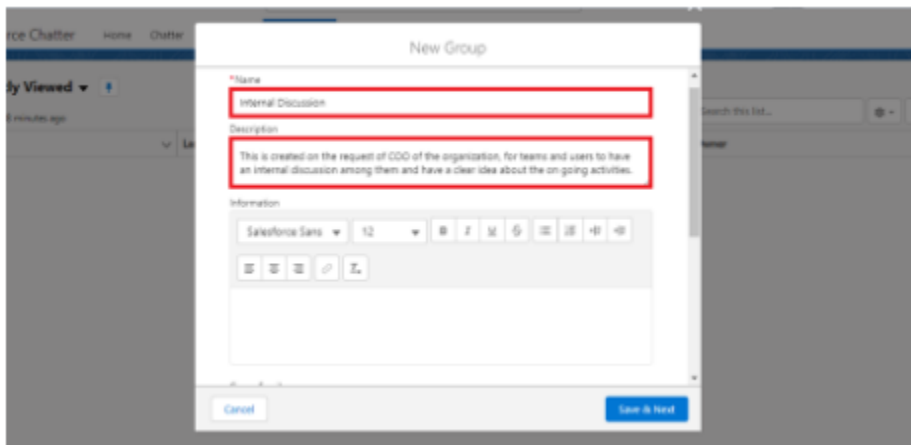


Click New



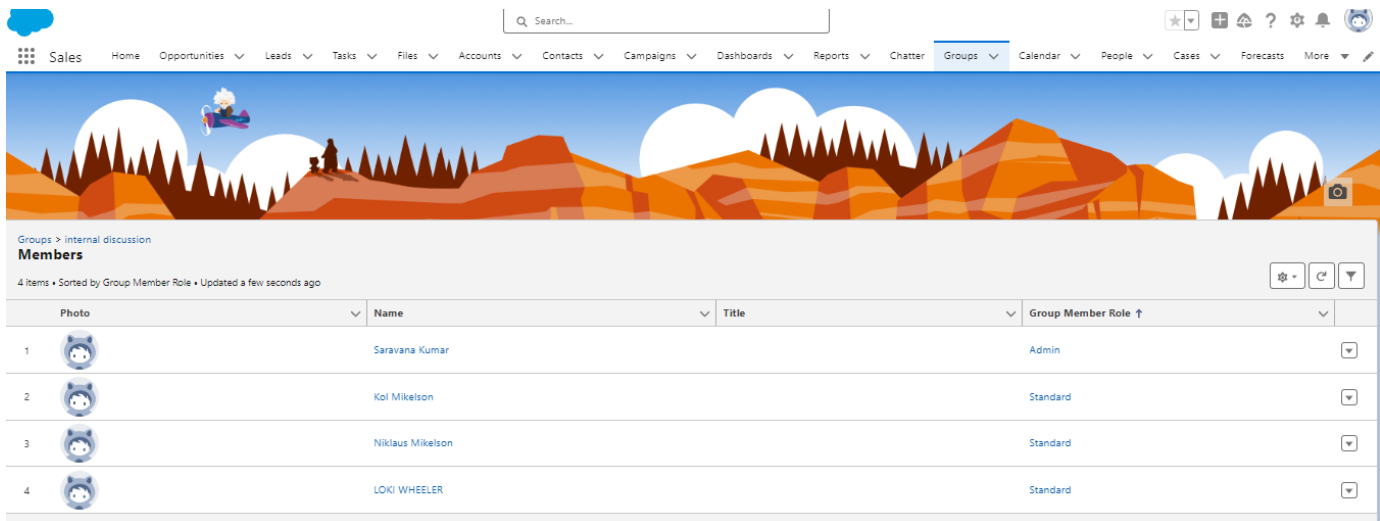
1. Fill in the new group information with these details:

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.

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



- This is how your group interface looks like.
- 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.
- 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.

Record Types

Task 14 a: Creating On Site Employee Record Type

To create a Record Type:

- Go to Setup --> click on Object Manager --> Search for the object (Employee) --> from drop down click Edit.
- From the left panel click Record Types --> New.
- Give Record Type Label as "On Site Employee" and make it active
- Uncheck for "Make Available"
- Scroll down and check for the Manager & System Administrator profile and click on Next.
- Select "Apply a different layout for each profile", and change page layout to On Site Employee Layout for manager profile and System Administrator.
- click Save.

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Employee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Edit Record Type

On Site Employee

Enter a new name for the selected record type and click Save.

Record Type

Record Type Label

On Site Employee

Record Type Name

On_Site_Employee

Namespace Prefix

Description

Active

Save

Cancel

click Save.

Task 14 b: Creating "Remote Employee" Record Type

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

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Employee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Record Type

Remote Employee

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Record Type Label

Remote Employee

Record Type Name

Remote_Employee

Namespace Prefix

Description

Created By

Saravana Kumar

21/11/2024, 6:39 pm

Modified By

Saravana Kumar

21/11/2024, 6:39 pm

Picklists Available for Editing

Action	Field	Modified Date
Edit	Gender	21/11/2024, 6:39 pm
Edit	Mode of work	21/11/2024, 6:39 pm

Permission Sets

Task 15 a: Creating A Permission Set

To Create a Permission Set:

1. Go to setup --> type “permission sets” in quick search --> select permission sets --> New.

The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Setup' menu is open, and 'Permission Sets' is selected under the 'Users' section. The main content area displays the 'Permission Sets' page. At the top, there's a search bar with 'permission' entered. Below the search bar, there's a 'New' button and a list of existing permission sets. The list has columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The first few items in the list are 'Contact Center Bring Your Own Channel User', 'Contact Center Supervisor', 'Contact Center Supervisor (Partner Telephony)', 'Data Cloud Home Org Integration User', and 'DeliveryEstimationServicePermSet'. The 'New' button is highlighted with a red box.

2. Enter the label name as “Per to Emp” --> Save.

The screenshot shows the 'Create' form for a new Permission Set. The form is titled 'Permission Set Create'. It has a 'Save' button and a 'Cancel' button. The form fields are: 'Label' (with the value 'Per to Emp'), 'API Name' (with the value 'Per_to_Emp'), and 'Description' (which is empty). The 'Label' and 'API Name' fields are highlighted with a red box. The 'Session Activation Required' checkbox is also visible.

3. Under Apps Select object settings.

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages
- External Data Source Access**
Permissions to authenticate against external data sources
- Flow Access**
Permissions to execute Flows
- Named Credential Access**
Permissions to authenticate against named credentials
- Custom Permissions**
Permissions to access custom processes and apps
- Custom Metadata Types**
Permissions to access custom metadata types
- Custom Setting Definitions**
Permissions to access custom settings

- Click on Employee object --> click on Edit --> under object permission check for read and create.

Permission Set
Adding Employee

Find Settings... | Clone | Edit Properties | Manage Assignments

Permission Set Overview > Object Settings > Employees

Employees Save Cancel

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

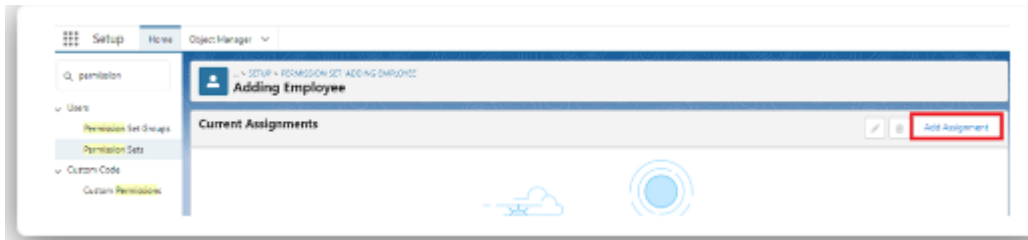
Employee: Record Type Assignments

Record Types	Assigned Record Types
On Site Employee	<input checked="" type="checkbox"/>
Remote Employee	<input type="checkbox"/>

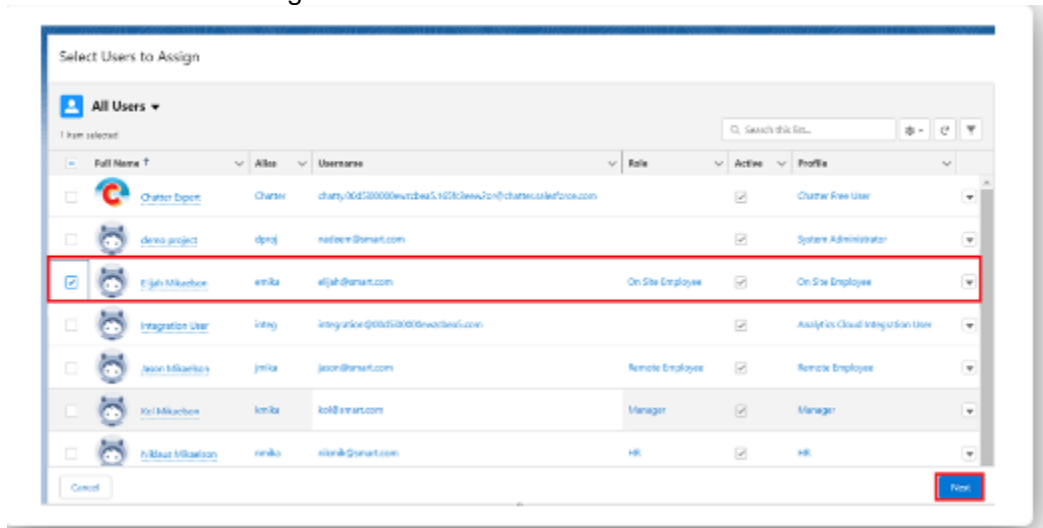
Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

- Click on Save.
- After saving the permission click on the Manage assignment
- Now click on the Manage Assignment.



8. Click on Add Assignment.



9. Now select the users(any one user with the profile “On Site Employee”) and click on Next.
10. Click on Assign
11. Click on Done.

Reports

Task 17: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

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter More

Report: Employees with ProjectTasks and Projects
Employee with Assets

Enable Field Editing Add Chart Edit

Total Records
10

	Employee Name	Employee: Employee ID	ProjectTask: Project Task Name	Project Task: Project ID	Employee: Record Type	Reports to
1	Malathi	EMS-0010	Bank app	Proj-0013	-	EMS-0003
2	Swetha	EMS-0008	GSQUARE	Proj-0009	-	EMS-0003
3	Varsha	EMS-0009	CAR	Proj-0010	-	EMS-0003
4	Swetha	EMS-0008	airpods	Proj-0012	-	EMS-0003
5	RAJ	EMS-0011	LAND	Proj-0006	-	EMS-0006
6	ajith	EMS-0007	Moboile app	Proj-0014	-	-
7	ajith	EMS-0007	LAPTOP	Proj-0011	-	-
8	ajith	EMS-0007	KSQUARE	Proj-0006	-	-
9	ajith	EMS-0007	FARMHOUSE	Proj-0010	-	-
10	ajith	EMS-0007	Clear Discount Percentage	Proj-0006	-	-

Activate Windows
Go to Settings to activate Windows.

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

- Create a report with report type: "Employees with ProjectTasks and Projects".

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports

Report: Employees with ProjectTasks and Projects
Employee with projectTasks and Projects

Enable Field Editing

Total Records
10

	Employee: Employee ID	ProjectTask: Project Task Name	Project Task: Project ID	ProjectTask: Created By
1	EMS-0008	airpods	Proj-0012	Saravana Kumar
2	EMS-0009	CAR	Proj-0010	Saravana Kumar
3	EMS-0007	Clear Discount Percentage	Proj-0006	Saravana Kumar
4	EMS-0011	LAND	Proj-0006	Saravana Kumar
5	EMS-0007	FARMHOUSE	Proj-0010	Saravana Kumar
6	EMS-0008	GSQUARE	Proj-0009	Saravana Kumar
7	EMS-0007	KSQUARE	Proj-0006	Saravana Kumar
8	EMS-0007	LAPTOP	Proj-0011	Saravana Kumar
9	EMS-0010	Bank app	Proj-0013	Saravana Kumar
10	EMS-0007	Moboile app	Proj-0014	Saravana Kumar

- Create a report with report type: "Employees with Assets".

Report: Employees with ProjectTasks and Projects

Employee with Assets

Enable Field Editing

Add Chart

Total Records
10

	Employee Name	Employee: Employee ID	ProjectTask: Project Task Name	Project Task: Project ID	Employee: Record Type	Reports to
1	Malathi	EMS-0010	Bank app	Proj-0013	-	EMS-0003
2	Swetha	EMS-0008	GSQUARE	Proj-0009	-	EMS-0003
3	Varsha	EMS-0009	CAR	Proj-0010	-	EMS-0003
4	Swetha	EMS-0008	airpods	Proj-0012	-	EMS-0003
5	RAJ	EMS-0011	LAND	Proj-0006	-	EMS-0006
6	aijith	EMS-0007	Moboile app	Proj-0014	-	-
7	aijith	EMS-0007	LAPTOP	Proj-0011	-	-
8	aijith	EMS-0007	KSQUARE	Proj-0006	-	-
9	aijith	EMS-0007	FARMHOUSE	Proj-0010	-	-
0	aijith	EMS-0007	Clear Discount Percentage	Proj-0006	-	-

Activate
Go to Settings

Dashboards

Activity 1: Create Dashboard

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

More

Dashboards

Recent

3 items

Search recent dashboards...

New Dashboard

New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Dashboard1		Private Dashboards	Saravana Kumar	21/11/2024, 8:05 pm	

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

Activity 2:

Create another Dashboard as we discussed in activity 1.

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

More

Search...

Dashboards

Recent

1 items

Search recent dashboards...

New Dashboard

New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Dashboard1		Private Dashboards	Saravana Kumar	21/11/2024, 8:05 pm	
Created by Me	Dashboard3		Private Dashboards	Saravana Kumar	21/11/2024, 8:08 pm	
Private Dashboards	Dashboard2		Private Dashboards	Saravana Kumar	21/11/2024, 8:07 pm	

Done.

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>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)

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Leave

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Details

Description

API Name

Leave__c

Custom

✓

Singular Label

Leave

Plural Label

Leaves

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

Setup Home Object Manager

SETUP > OBJECT MANAGER

Leave

Details

Fields & Relationships
9 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Description	Description__c	Rich Text Area(32768)		
Employee Name	Employee_Name__c	Lookup(Employee)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Leave Name	Name	Auto Number		✓
Number of days	Number_of_days__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Status	Status__c	Picklist		
Subject	Subject__c	Text(18)		

Activate Windows
Go to Settings to activate Windows.

Activity - 2

Create an Approval Process for Leave object.

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

Setup Home Object Manager

Q approval

Q Search Setup

Setup

Approval Processes

Approval Processes

Leave

Help for this Page

Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

1. Read the help topic
2. View the checklist
3. Create a custom user hierarchical relationship field
4. Create email templates
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
7. Activate the process to deploy to your users

Manage Approval Processes For: Leave

A listing of both active and inactive approval processes for Leaves is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

Create New Approval Process

Active Approval Processes

Action	Process Order	Approval Process Name	Description
Edit Deactivate	1	Leave Approval Request1	

Inactive Approval Processes

Activate Windows
Go to Settings to activate Windows.

Done.

Activity - 3

initial Submission Action:

- 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

Activity - 5

Final Approval Action:

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

- 2.
3. Give name as “Approval Status to Approved”.

4. Select Status for the field to update.
Under specify new field value select “A specific value” and select Approved and click Save.

Activity - 6

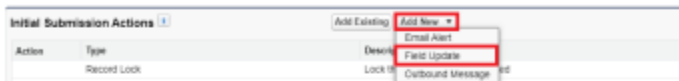
Final Rejection Action:

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.

Activity 2:

Initial Submission Action:

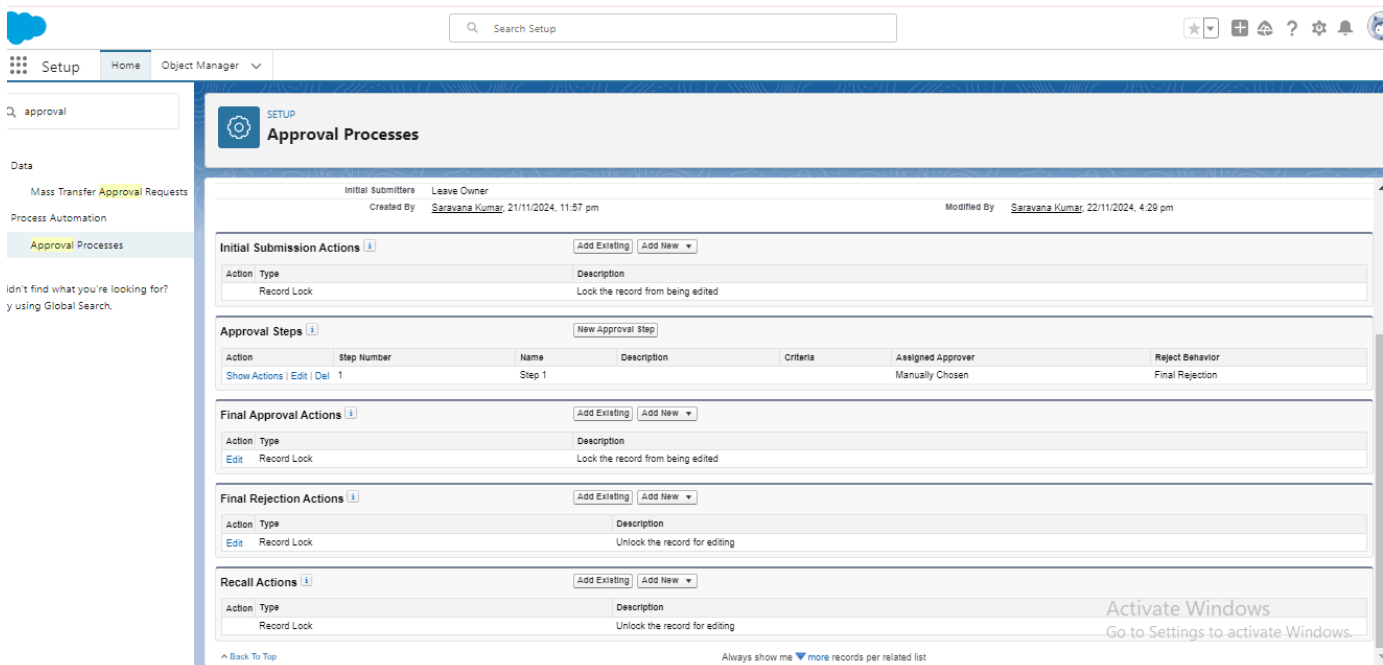
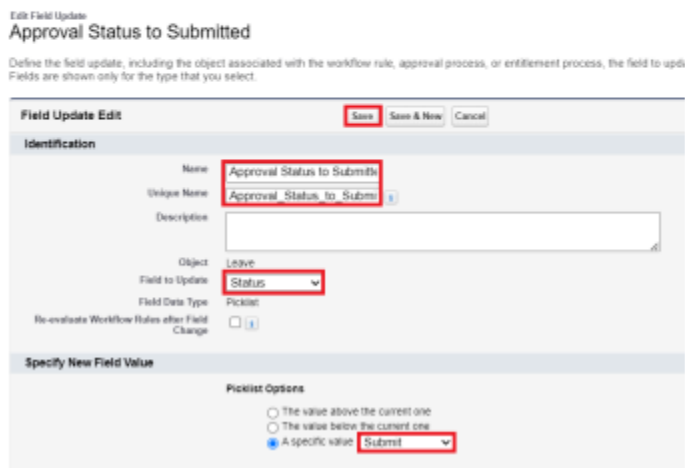
1. Under initial submission action click on add new and then select field update.



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.

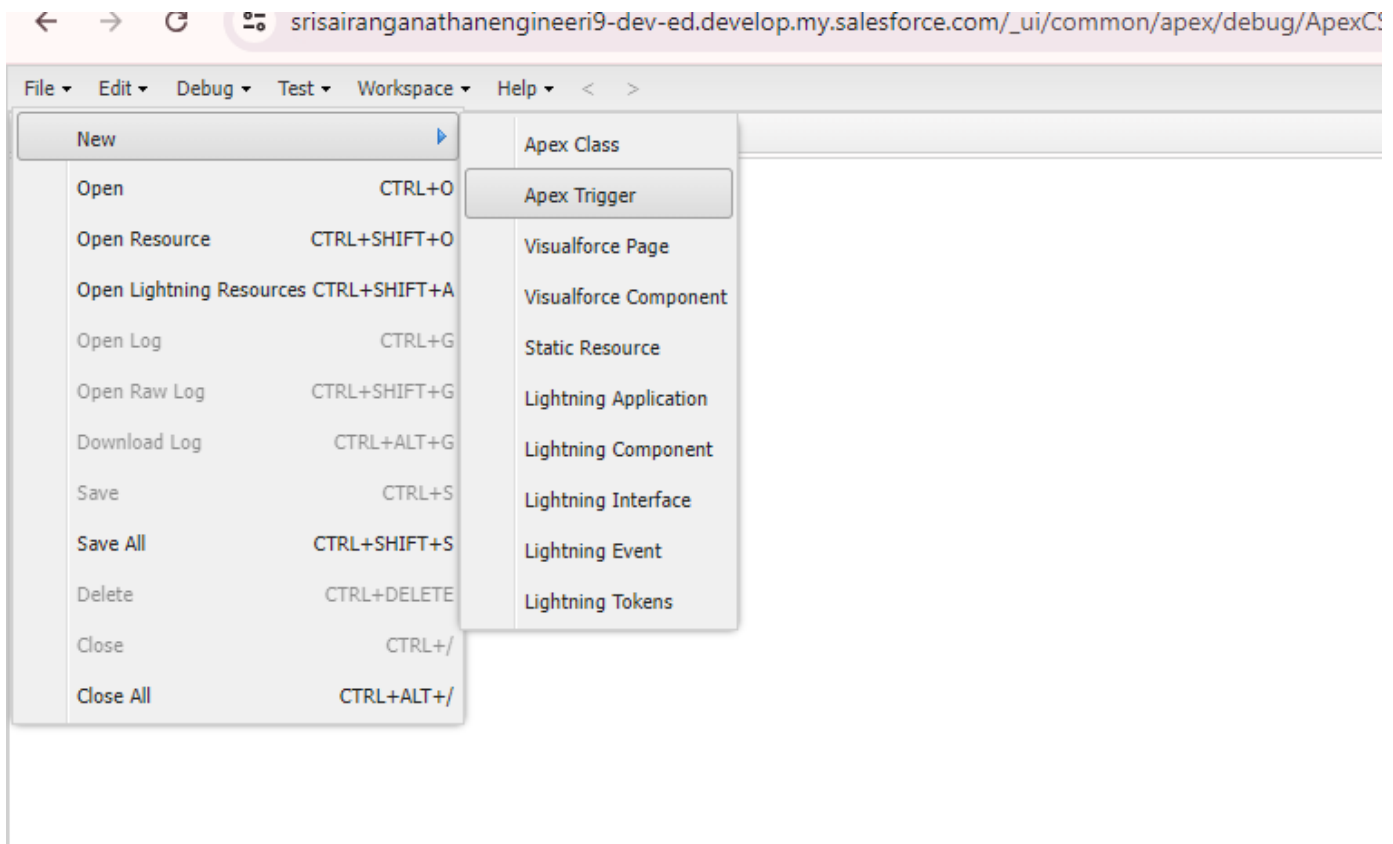


Apporval process activites done.

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.



1. Give the Apex Trigger name as "EmplInsert", and select "Employee__c" from the dropdown for sObject.

EmpInsert

Code Coverage: None API Version: 62

```

1 trigger EmpInsert on Employee__c (before insert) {
2
3     for(Employee__c pass : Trigger.New){
4
5         List<Employee__c> mynew = [SELECT Id, Name FROM Employee__c WHERE Employee_Name__c =: pass.Employee_Name__c];
6
7         if(mynew.size() > 0){
8
9             pass.Name.addError('Employee with same name is existing');
10
11         }
12
13     }
14 }

```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
Saravana Kumar	Unknown	ApexTestHandler	11/22/2024, 4:46:26 PM	Success	Unread	359.26 KB
Saravana Kumar	Unknown	ApexTestHandler	11/22/2024, 4:46:26 PM	Success	Unread	215.89 KB
Saravana Kumar	Unknown	ApexTestHandler	11/22/2024, 4:46:25 PM	Success	Unread	16.69 KB
Saravana Kumar	Unknown	ApexTestHandler	11/22/2024, 4:46:25 PM	Success	Unread	8.44 KB
Saravana Kumar	Unknown	ApexTestHandler	11/22/2024, 4:46:25 PM	Success	Unread	4.01 KB
Saravana Kumar	Unknown	ApexTestHandler	11/22/2024, 4:46:25 PM	Success	Unread	10.51 KB

RUNNING SUCCESFULLY

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”.

Student Object Manager | Salesforce New Employee: On Site Employee

srisairanganathanengineer9-dev-ed.develop.lightning.force.com/lightning/o/Employee__c/new?count=3&nooverride=1&useRecordTypeCheck=1&navigationLocation=...

New Employee: On Site Employee

Information

Employee ID Owner Saravana Kumar

Employee Name kowshik

Gender --None--

Reports to Search Employees...

Email

phone no

With Approvals

Web Approval Amount

We hit a snag.

Review the errors on this page.

- Employee with same name is existing

Review the following fields

- Employee ID

Cancel Save & New Save

Employees Recently Viewed 10 Items • Updated a few seconds ago

	Employee ID
1	EMS-0004
2	EMS-0003
3	EMS-0027
4	EMS-0010
5	EMS-0006
6	EMS-0026
7	EMS-0011
8	EMS-0009
9	EMS-0008
10	EMS-0007

To Do List

Type here to search

10:34 22-11-2024

DONE.

Conclusion

In conclusion, the Workforce Administration Solution project successfully integrates Salesforce's powerful tools to automate and optimize workforce management processes. By improving scheduling, data accuracy, and compliance, the solution enhances operational efficiency and employee engagement. Real-time insights and seamless integration with existing systems enable better decision-making and cost optimization. Ultimately, the project contributes to a more productive, compliant, and scalable workforce management system.

Thank You