Workforce Administration Solution (Dev)

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Project Description:

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.

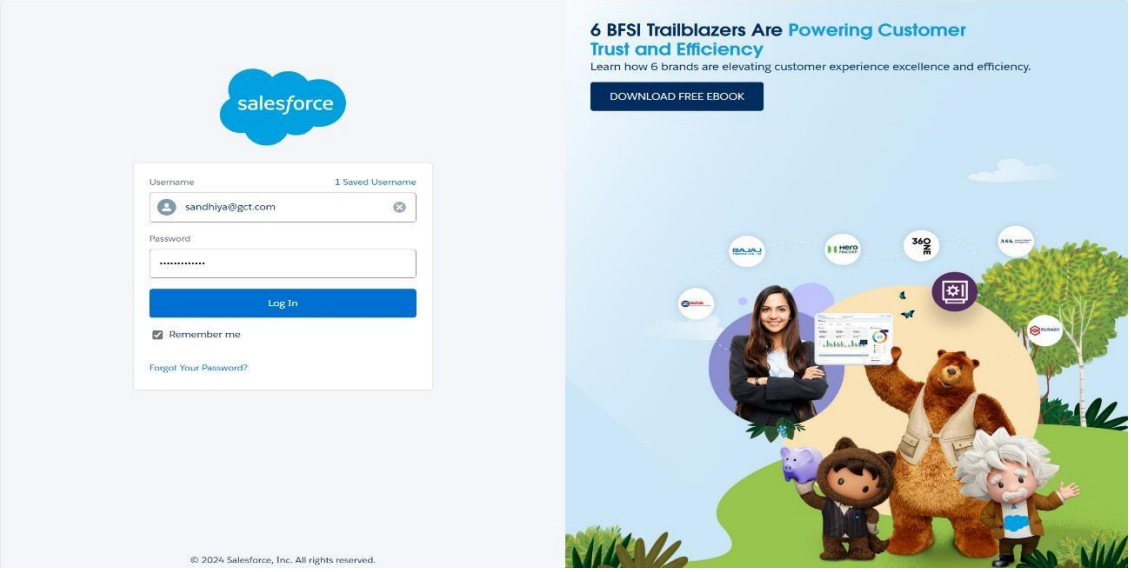
Module1: Salesforce

Activity 1: Creating Developer Account

In this activity, I created a developer account on Salesforce to access tools for building and customizing Salesforce applications. Submitted the form by clicking "Sign me up" to complete the account creation process.

Activity 2: Account Activation

An email confirmation was sent for verification, and the developer account was successfully activated.



Module2: Object

Activity 1: Create Employee Object:

Created the "Employee" custom object to record individual employee details, activities, and progress, helping track team and personal development within the organization.

Activity 2: Create Project Object

Created the "Project" custom object to store detailed information on ongoing and completed projects. This object enables efficient tracking of project timelines, objectives, and statuses. It centralizes project data, supporting progress monitoring and reporting**.**

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

ProjectTask Object:

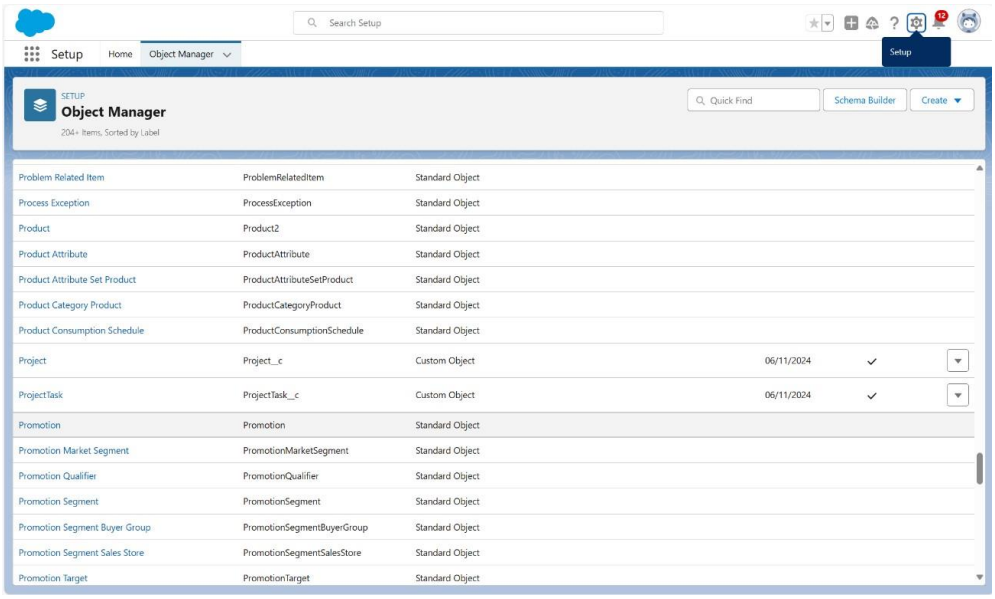
Created the "ProjectTask" object to log specific tasks within projects, allowing for detailed tracking of task progress, deadlines, and assigned team members.

Asset Object:

Developed the "Asset" object to manage resources associated with projects, such as equipment, to streamline asset allocation and tracking.

Asset Service Object:

Created the "Asset Service" object to record maintenance and service details for project assets, ensuring proper upkeep and scheduling of asset services.



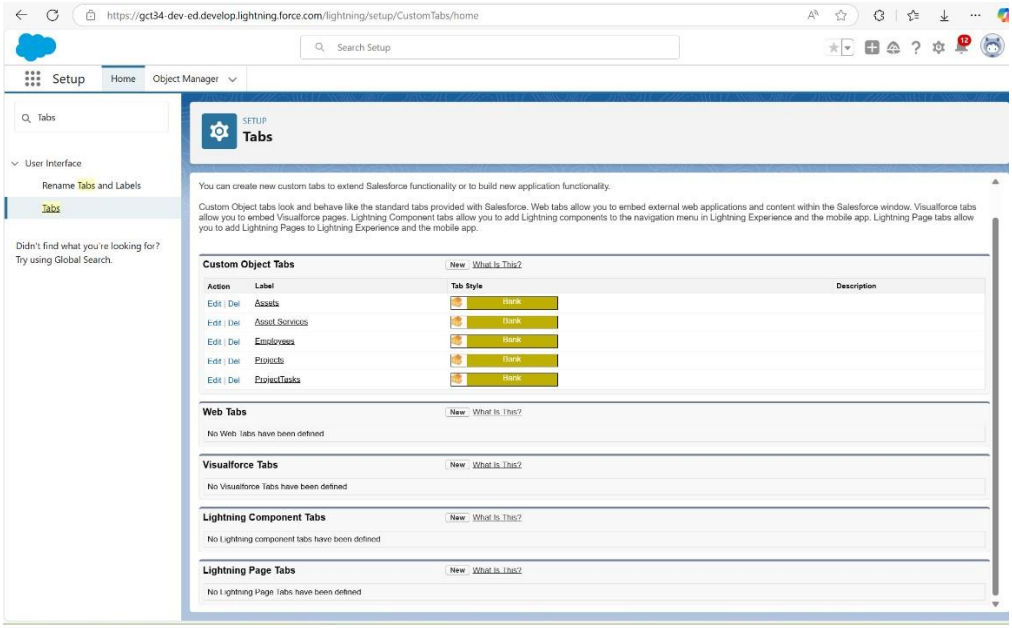
Module3: Tabs

Activity 1: Creating a Custom Tab (Employee)

Activity 2: Creating a Custom Tab (Project)

Activity 3: Creating tabs for remaining objects

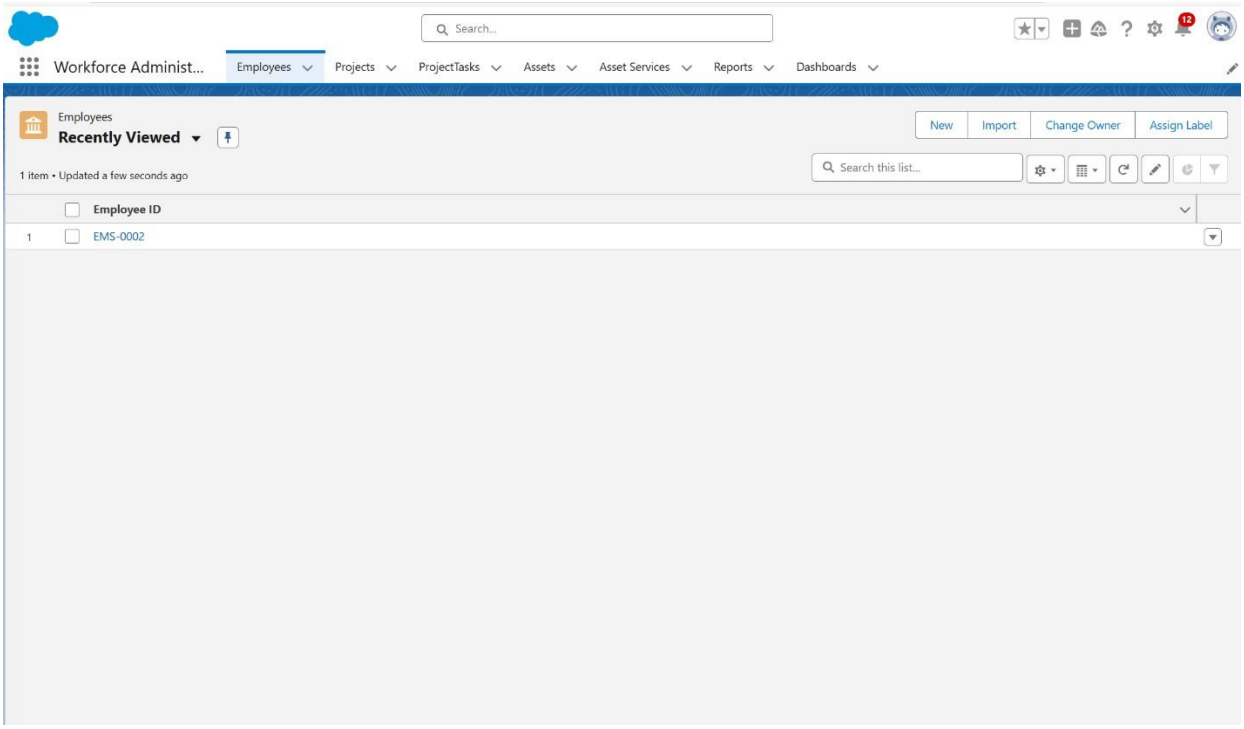
Created custom tabs for the Employee, Project, ProjectTask, Asset, and Asset Service objects to provide easy access to each object's records in Salesforce. These tabs allow users to quickly navigate and manage data for each object, improving the efficiency of tracking and reporting.



Module4: The Lightning App

Activity 1: Create a Lightning App

Created the app named "Workforce Administrator Solution" with a meaningful description.



Module5: Fields & Relationships

1. **Creating Text Field in Employee Object:**
   Added a text field to the Employee object for capturing text-based data.

2. **Creating Date of Birth Field in Employee Object:**
   Added a Date of Birth field to store employees' birth dates.

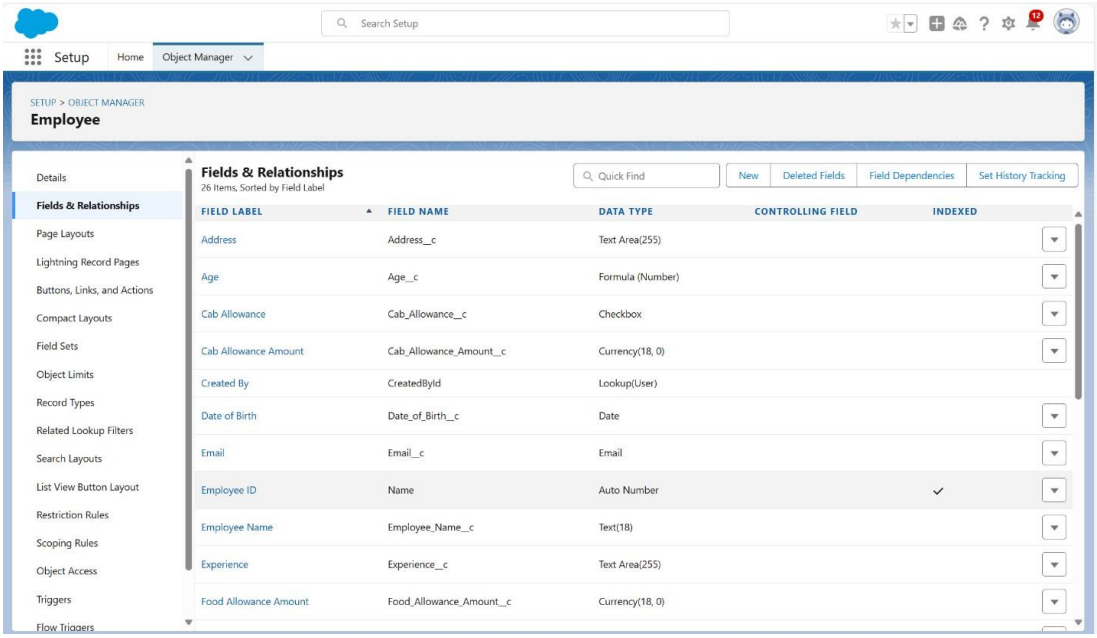
3. **Creating Formula Field in Employee Object:**
   Created a formula field to calculate specific data dynamically within the Employee object.

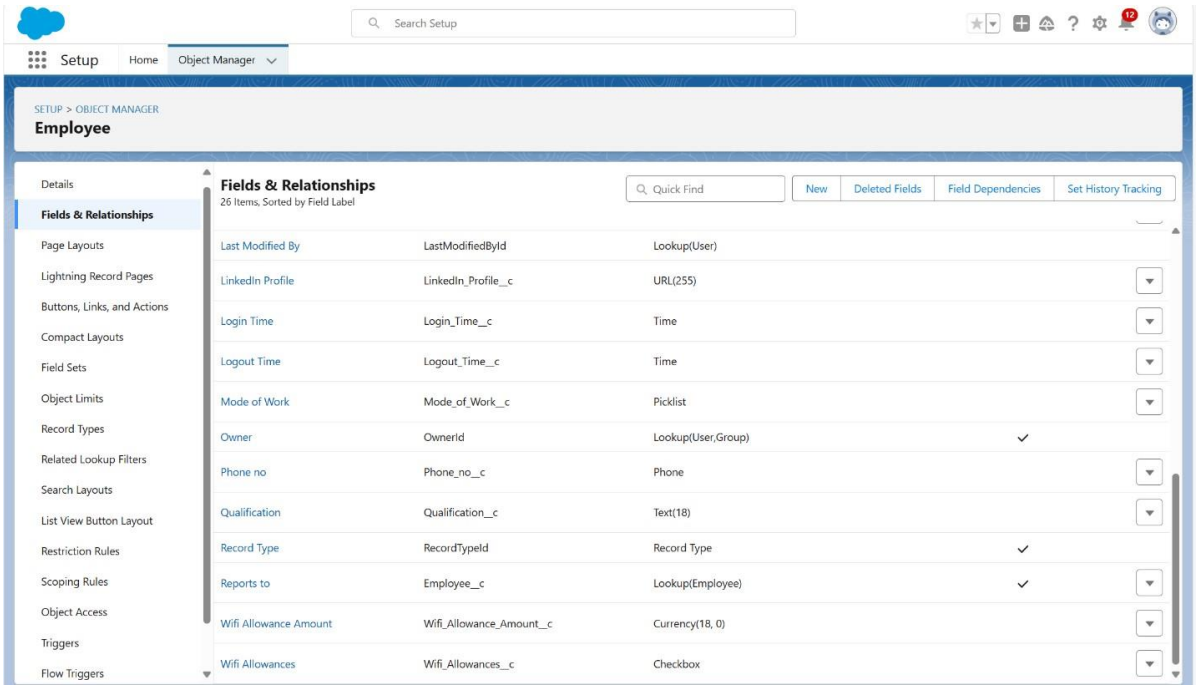
4. **Creating Picklist Field in Employee Object:**
   Added a picklist field to provide a predefined list of values for selection.

5. **Creating Self-Relationship Field in Employee Object:**
   Established a self-relationship field in the Employee object to link employees to each other.

6. **Creating Master-Detail Relationship between Employee & Asset Objects:** Created a master-detail relationship between the Employee and Asset objects to associate employees with assets.

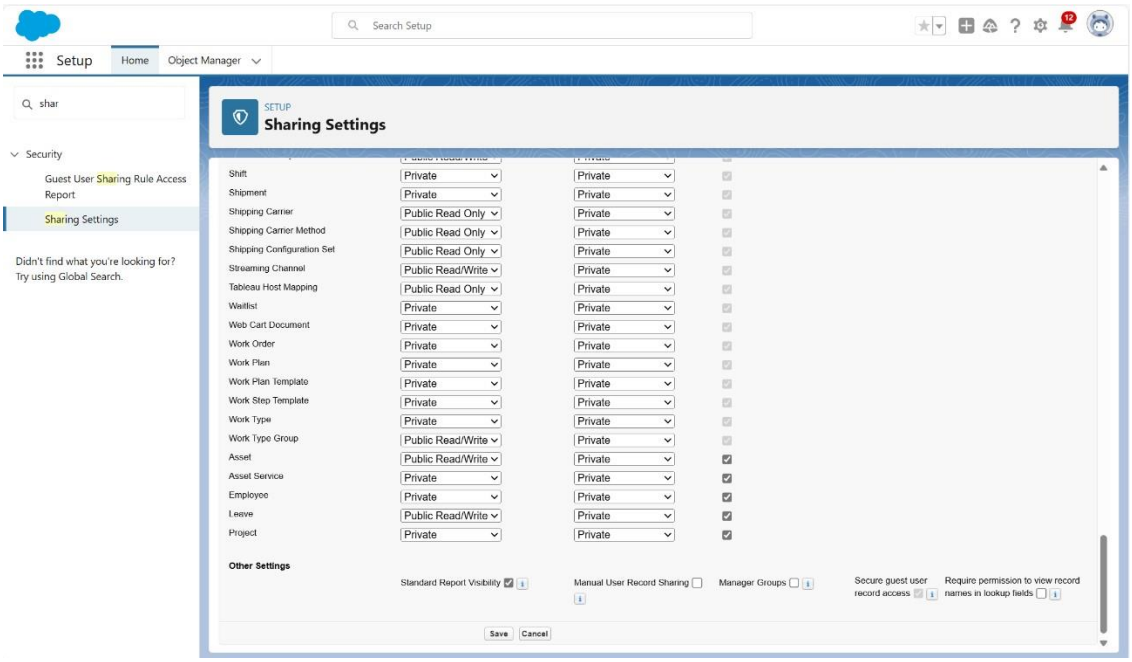
7. **Creating Remaining Fields in Employee Object:**
   Added other necessary custom fields to the Employee object as per project requirements.





Module6: Setting OWD

Configured the Organization-Wide Default (OWD) settings to define the access levels for records in Salesforce. The four access levels—Public Read/Write/Transfer, Public Read/Write, Public Read/Only, and Private—were set to control visibility and sharing of data. This ensures secure data access based on user roles and permissions.



Module7: User Adoption

1.Create a Record (Employee):

Created a new employee record in Salesforce to store detailed information about an employee.

2.View a Record (Employee):

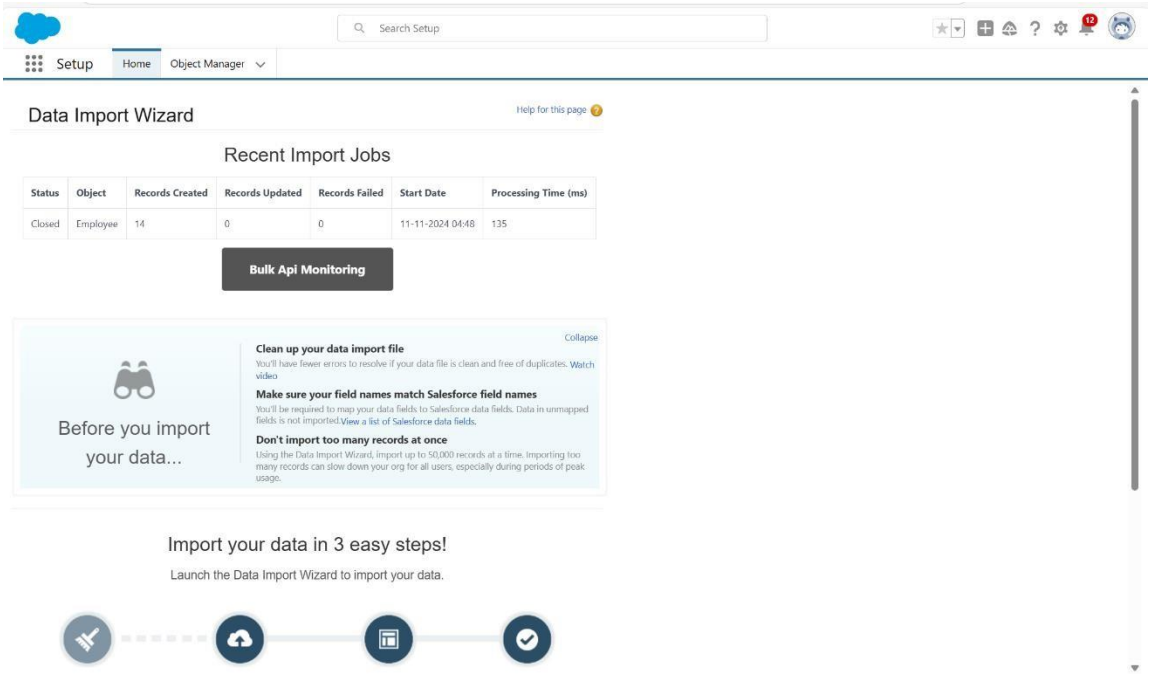
Accessed and viewed the employee record to check the stored details and ensure accuracy.

3.Delete a Record (Employee):

Deleted an employee record from Salesforce to remove outdated or incorrect information.

Module8: Import Data

Before creating the application, downloaded the CSV file from the provided URL and saved it locally. Used the Data Import Wizard tool in Salesforce to import the data from the CSV file into the Employee object. This allows for seamless integration of external data into the Salesforce system for better analysis and management.



Module9: Profiles

1.HR Profile:

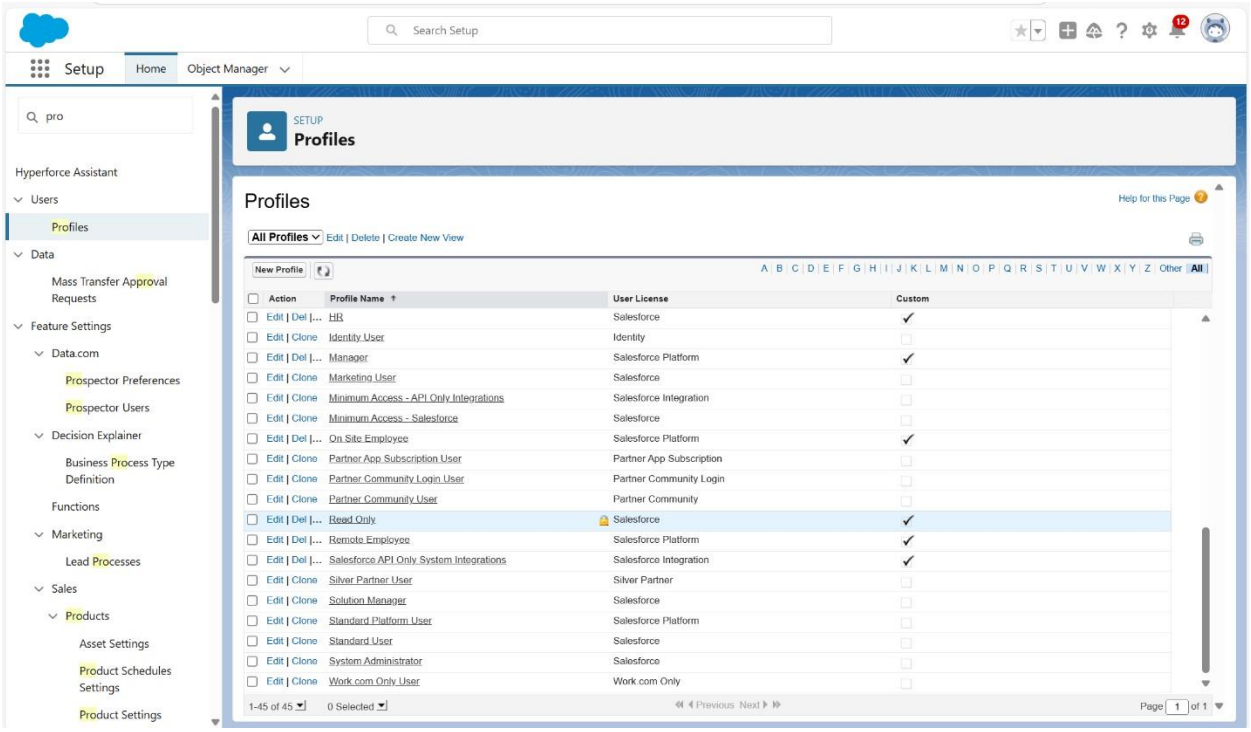
Created a custom HR profile with appropriate permissions for HR-related tasks, such as managing employee records.

2.Manager Profile:

Created a custom Manager profile to grant access to team performance data and project-related information.

3.Create Employee Profile:

Created a custom Employee profile to manage permissions for employees, allowing them to view and edit their own records.



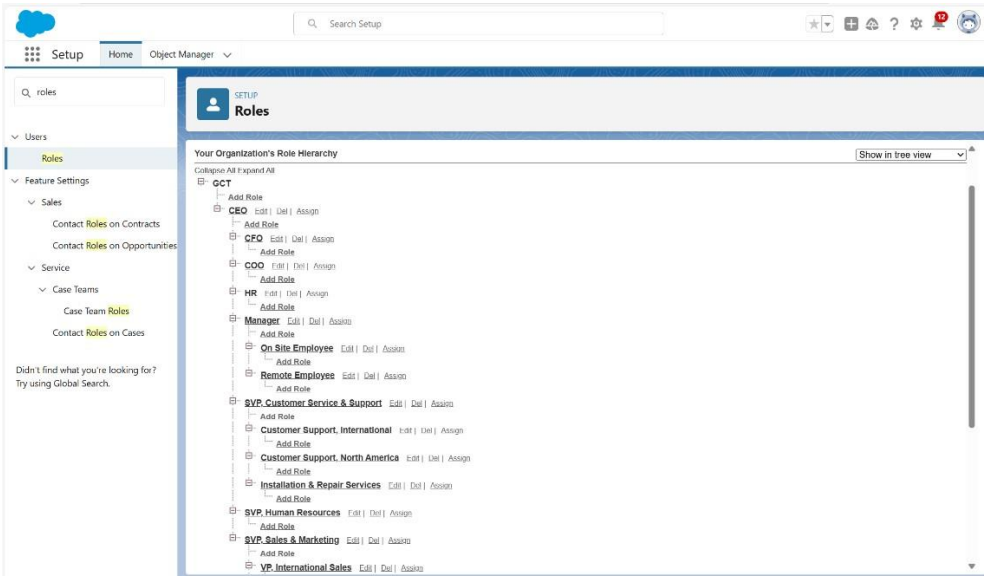
Module 10: Roles

1.Creating HR Role:

Created a custom HR role to define access permissions specific to HR-related data and records.

2.Creating Additional Roles:

Created additional roles to define and manage record-level access for different users within the Salesforce organization, ensuring proper visibility control.



Module 11: Users

1.Create User:

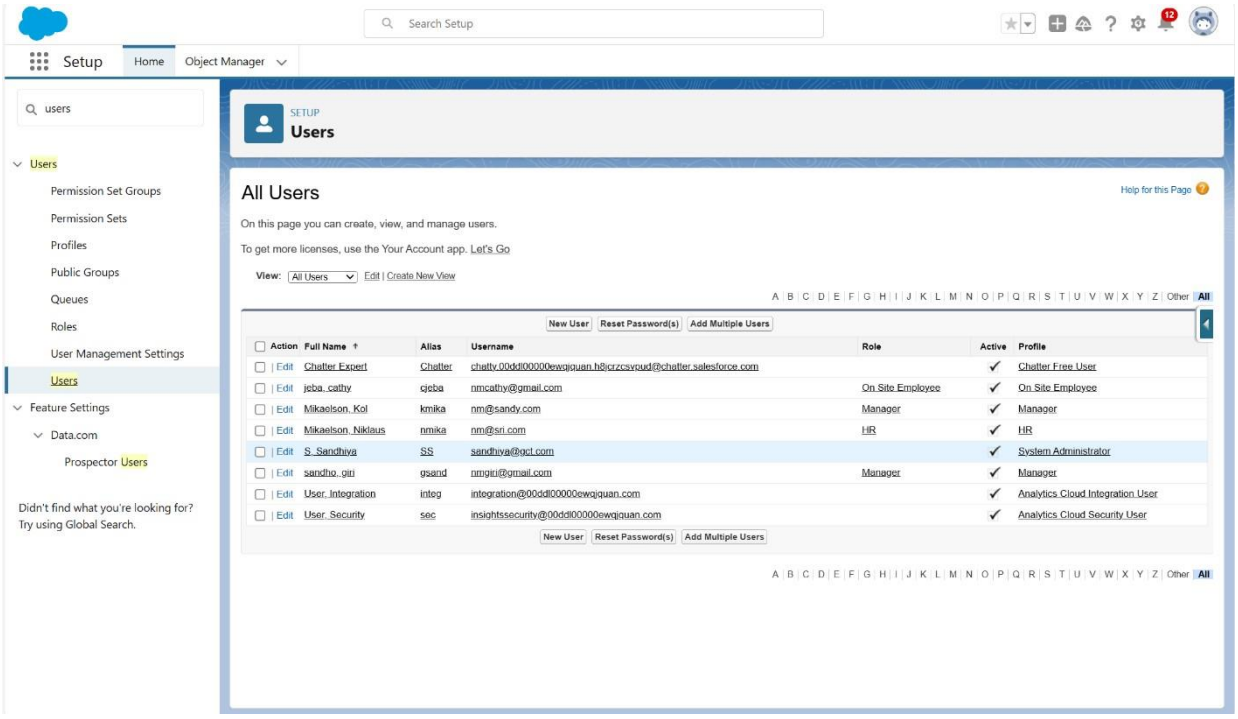
Created a new user account with the necessary details such as username, email address, first name, last name, and assigned profile and license.

2.Creating Another User:

Created an additional user account for another team member, configuring their username, email, and relevant settings.

3.Creating More Users:

Created multiple user accounts to ensure that all team members had access to Salesforce, each with their appropriate profile, role, and permissions.



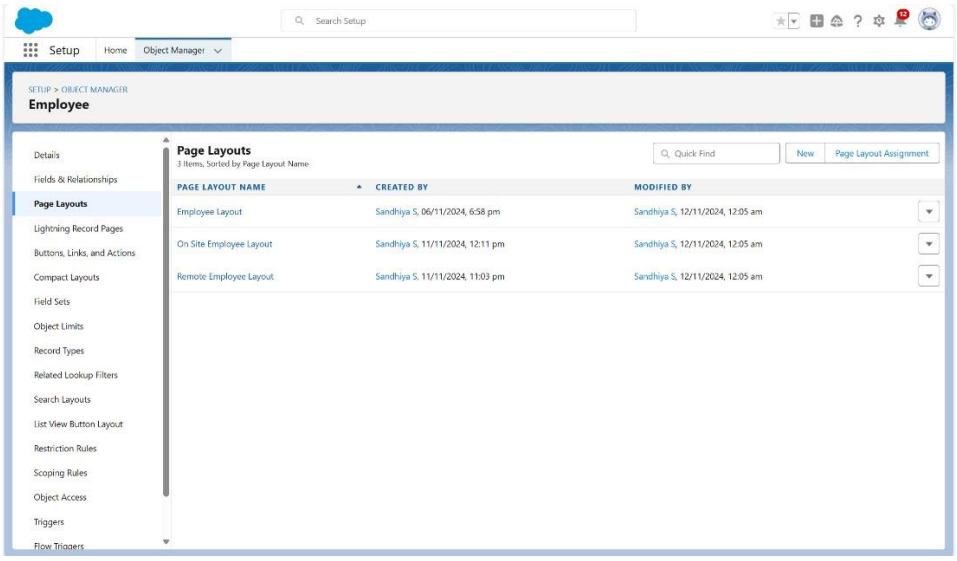
Module 12: Page layouts

1.Creating a Page Layout for Employee Object:

Created a page layout for the Employee object named “On Site Employee Layout”, customizing the design for the employee's detail and edit pages, and clicked Save.

2.Creating Another Page Layout:

Created another page layout called “Remote Employee Layout”, including only the Wifi Allowance and Wifi Allowances Amount fields in the allowances section.



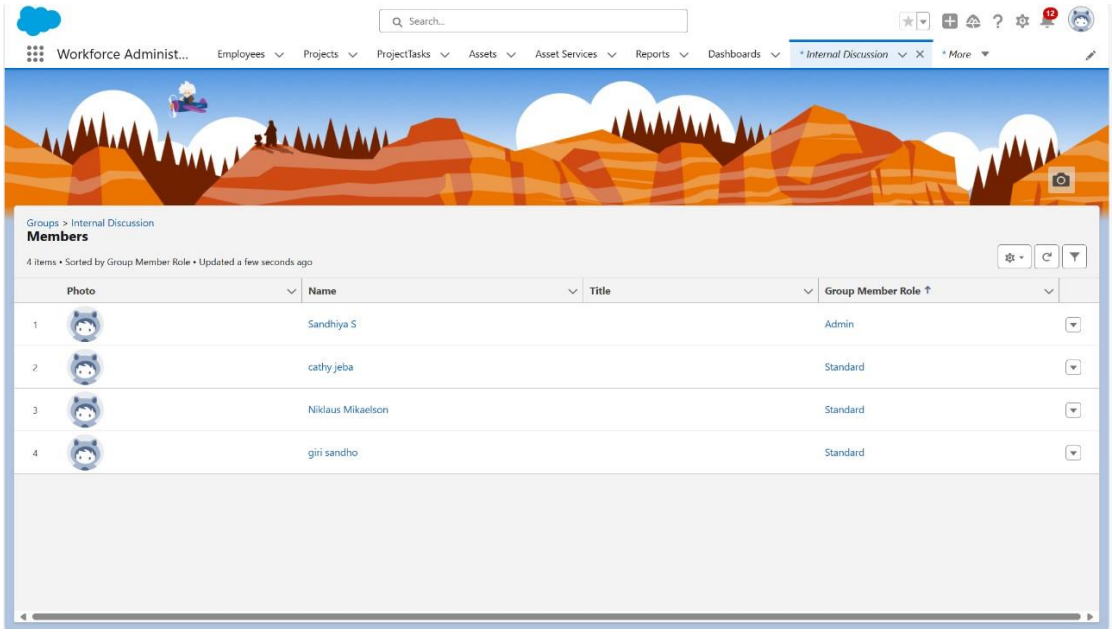
Module 13: Chatter group

1.Creating a Chatter Group for the Organization:

Created a new internal Chatter Group for the organization with the following details:

- Group Name: "Internal Discussion"
- Description: Provided a brief description outlining the purpose of the group for team discussions and information sharing.
- Access Type: Set to Private to restrict access to specific users. ○ Allow

  Customers: Not enabled, ensuring the group is for internal communication



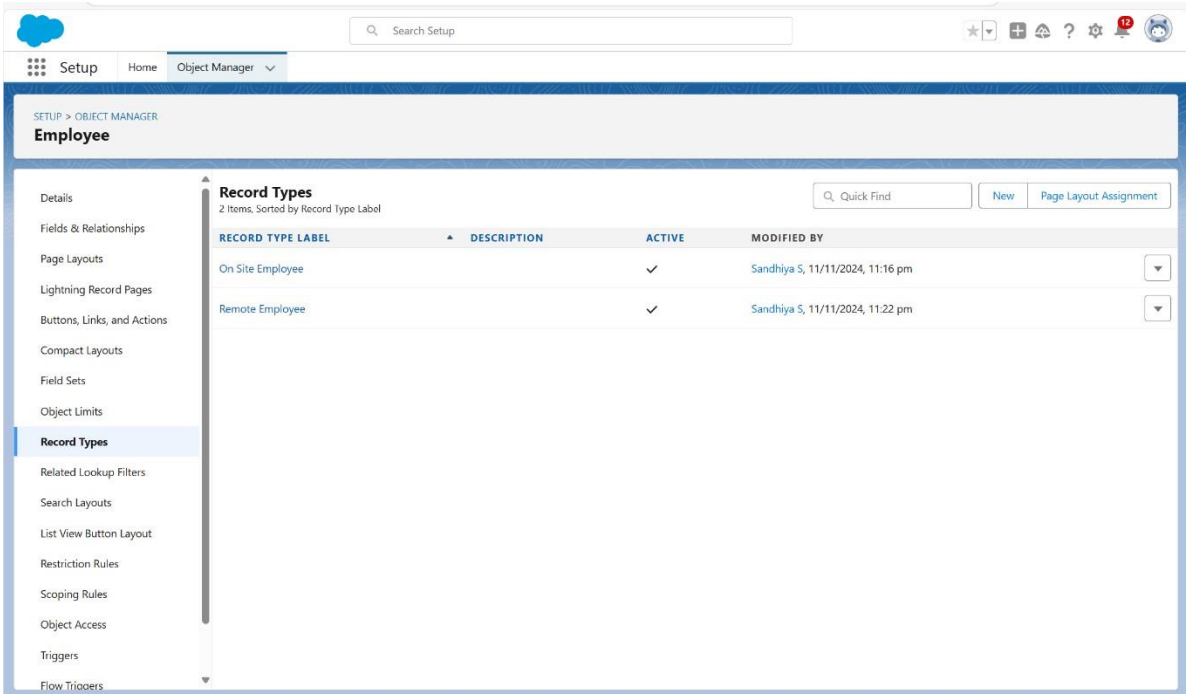
Module 14: Record types

1.Creating On Site Employee Record Type:

Created a record type named “On Site Employee” with the label “On Site Employee” and made it active. Disabled the “Make Available” option and applied a different page layout for profiles (Manager and System Administrator) by setting the layout to On Site Employee Layout.

2.Creating Remote Employee Record Type:

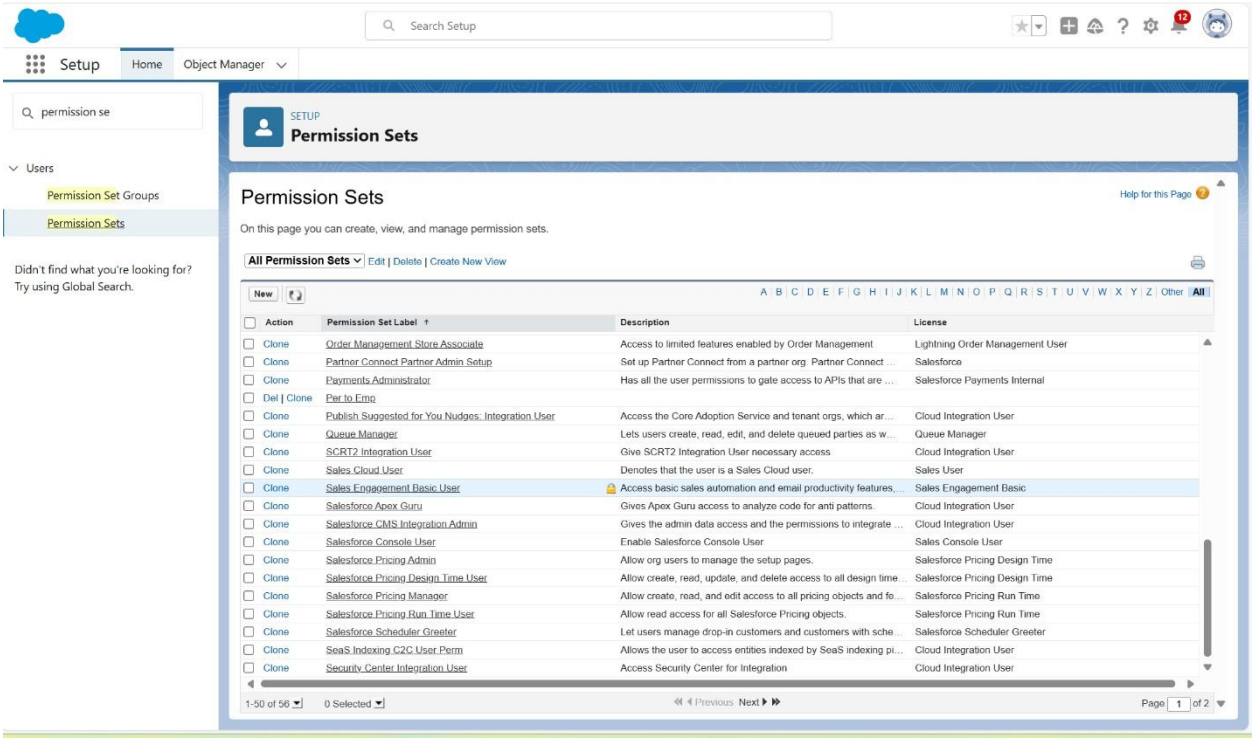
Created another record type named “Remote Employee”, following the same steps as the first activity, ensuring it is set up for the relevant profiles and page layouts.



Module 15: Permission sets

1.Creating a Permission Set:

Created a permission set named “Per to Emp” to extend user access to specific tools and functions without modifying their profiles, then saved the configuration.



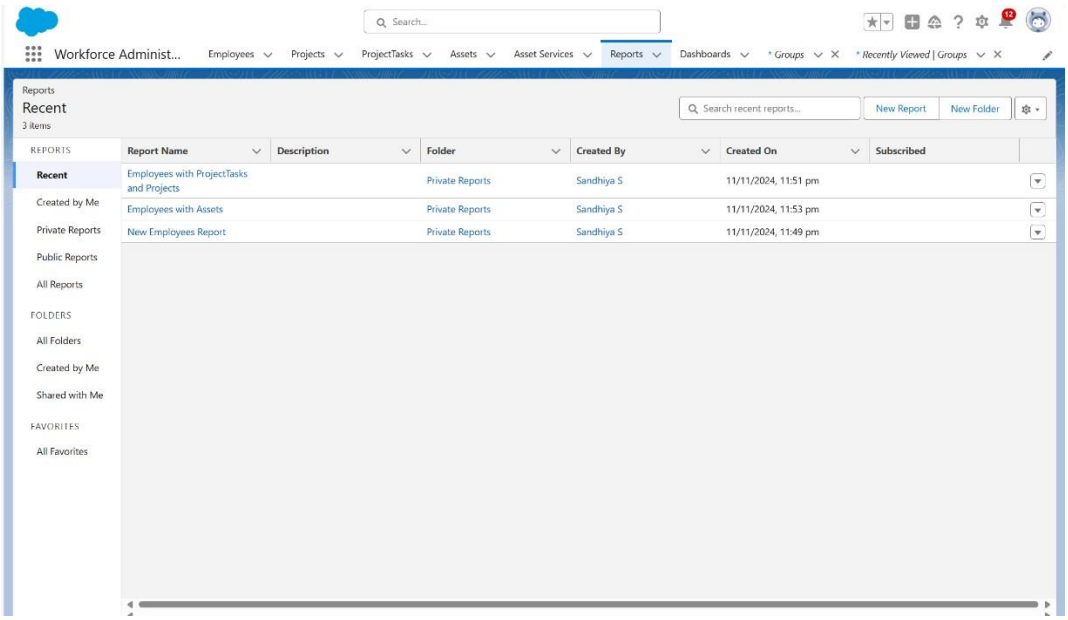
Module 16: Reports

1.Create Report:

Created an initial report to analyze data and gain insights within Salesforce.

2.Create Two More Reports:

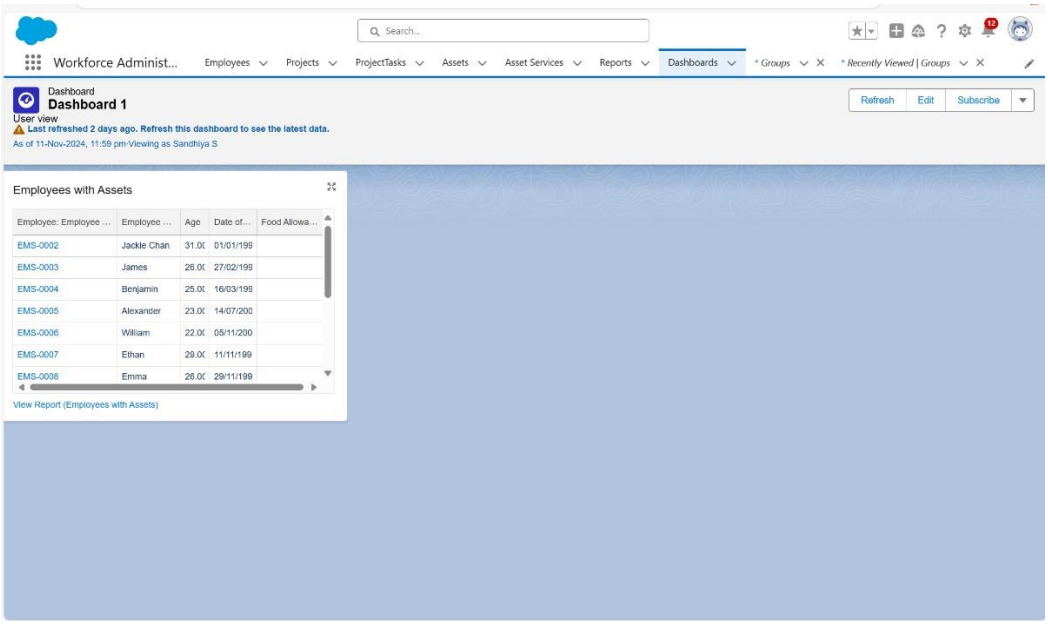
- Created a report with the type “Employees with ProjectTasks and Projects” to track employee involvement in projects.
- Created another report with the type “Employees with Assets” to monitor asset allocation per employee.

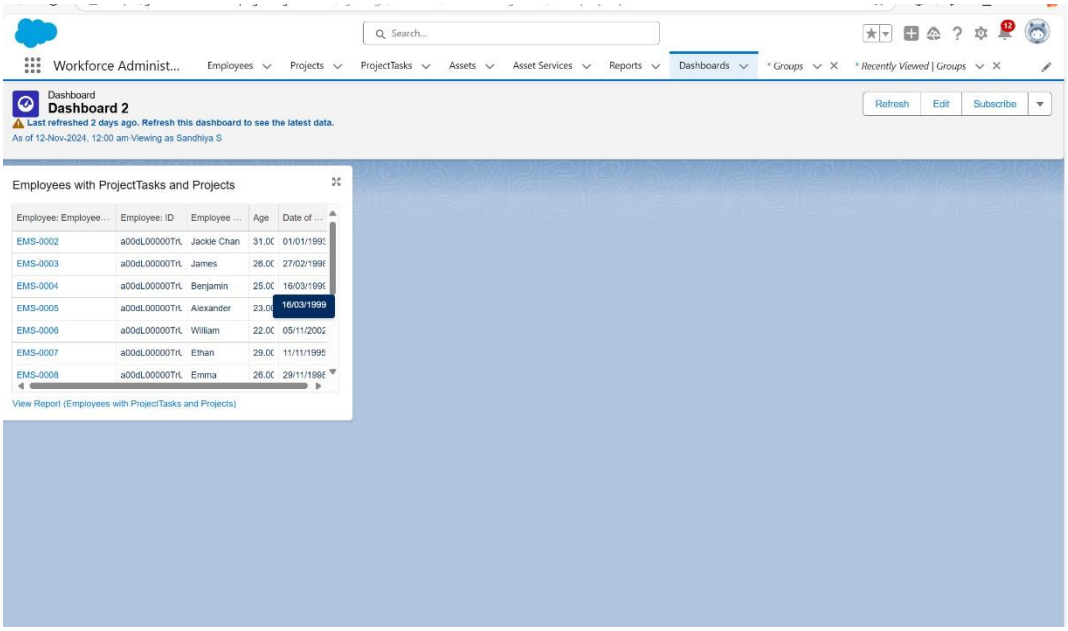


Module 17: Dashboards

1. **Create Dashboard:**
   Created a dashboard to visualize real-time data gathered from reports, helping users track trends and measure the impact of their activities.

2. **Create Another Dashboard:**
   Created an additional dashboard to provide further insights and analysis, as discussed in the first activity.





Module 18: Approval Process

1.Create Leave Object and Tab:

Created the Leave object with fields such as Employee Name, No. of Days, Subject, Description, and Status (picklist with values: Submitted, Approved, Rejected). Set the Status field to readonly and created a tab for easy access.

2. Set Up Leave Approval Process:

Created an approval process for the Leave object named “Leave Approval Request” using the Jump Start Wizard. Configured the approval to automatically assign leave applications over 5 days to the Manager role for review.

3.Set Initial Approval Status:

Set the field update rule “Approval Status to Submitted” to automatically update the status to Submitted when a new leave request is submitted.

4.Define HR Role Approver:

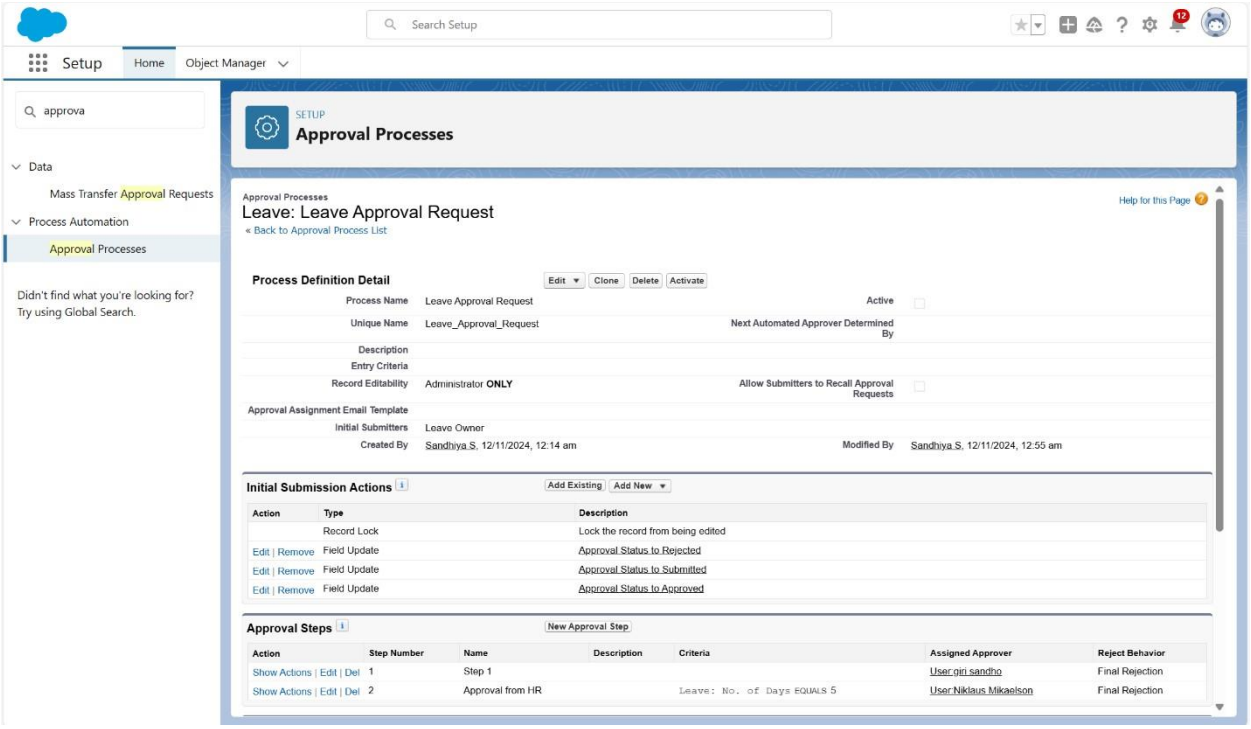
Configured the approval process to automatically assign requests to users with the HR role if further review is required.

5.Set Final Approval Status:

Created the field update rule “Approval Status to Approved” to update the status to Approved upon final approval.

6.Set Rejection Status:

Added a rule “Approval Status to Rejected” to change the status to Rejected if the request does not meet the necessary criteria.



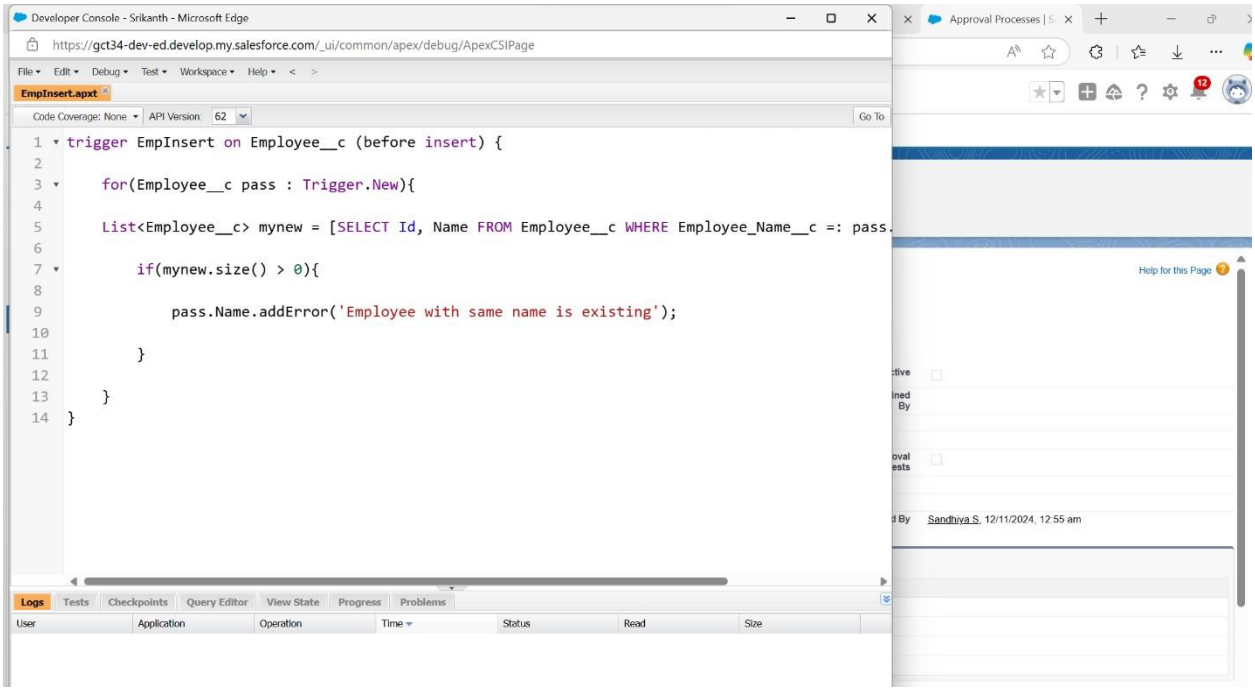
Module 19: Triggers

1.Create an Apex Trigger:

Developed an Apex Trigger named EmpInsert on the Employee object to prevent duplicate employee names. The trigger checks if an Employee record with the same Employee Name already exists and displays an error message "Employee with same name is existing" if a duplicate is found.

2.Test the Trigger:

Tested the trigger by attempting to create an Employee record with an existing name, such as “Jackie Chan”. As expected, the error "Employee with same name is existing" appeared, confirming that the trigger is functioning correctly.



Conclusion:

This project demonstrates the systematic setup and configuration of Salesforce to address organizational needs effectively. From creating custom objects, fields, and page layouts to implementing advanced features like approval processes, Apex triggers, and data import, each activity was designed to enhance functionality and ensure streamlined workflows. The implementation of reports, dashboards, and permission sets further improves data accessibility, visibility, and control. These configurations collectively enable efficient management of employee records, leave applications, and organizational processes, showcasing Salesforce as a powerful tool for business automation and decision-making.