Kallam Haranadhareddy Institute of Technology

Workforce Administration Solution(Dev)

By

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Project overview

The "Workforce Administration Solutions" project aims to streamline and enhance workforce management within organizations using Salesforce. This project focuses on automating employee records, tracking attendance, managing leave requests, and optimizing workforce allocation. By leveraging Salesforce capabilities, the system ensures efficiency, transparency, and improved decision-making. This report details the project's objectives, methodology, implementation, outcomes, and future recommendations.

INTRODUCTION

The "Workforce Administration Solutions" project was developed to address the challenges faced by organizations in managing their workforce efficiently. The goal was to implement a system within Salesforce that automates workforce operations such as employee records, attendance tracking, leave management, and performance monitoring. This report provides insights into the project's objectives, methodology, implementation, and impact.

Objectives

1. **Automate Workforce Management**: Streamline HR processes such as employee onboarding, attendance tracking, and leave requests.
2. **Enhance Employee Engagement**: Provide employees with a self-service portal for easy access to information and requests.
3. **Improve Decision-Making**: Leverage data analytics to optimize workforce allocation and monitor performance.

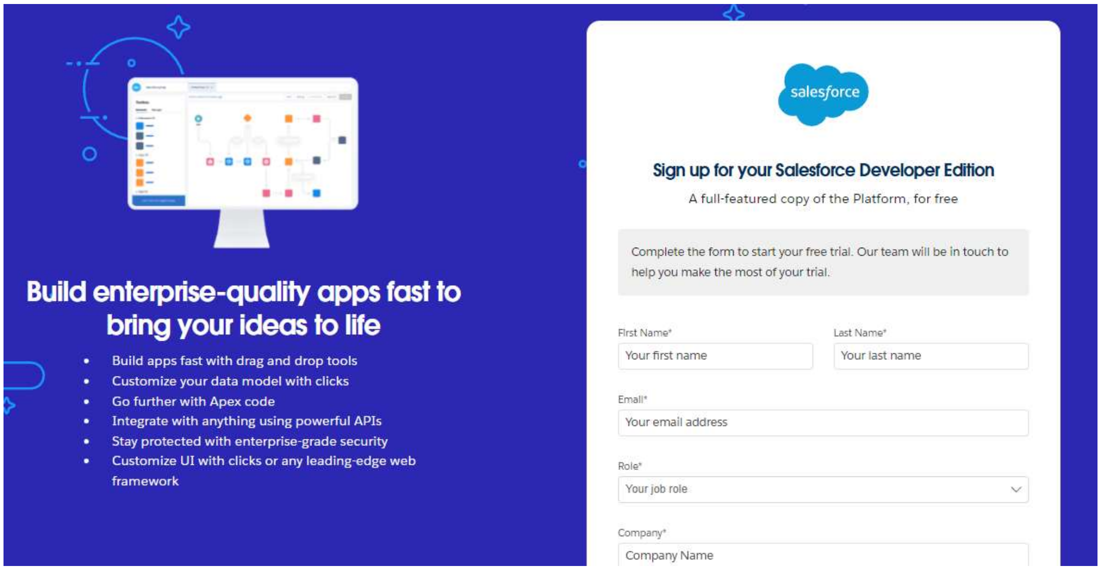
Methodology

1. **Requirements Gathering**: Conducted interviews and surveys with HR professionals to understand their challenges and requirements.
2. **System Design**: Developed a Salesforce-based architecture to manage workforce operations efficiently.
3. **Implementation**: Configured custom objects, automation rules, and dashboards for real-time monitoring.
4. **Testing & Deployment**: Conducted extensive testing before deploying the system organization-wide.

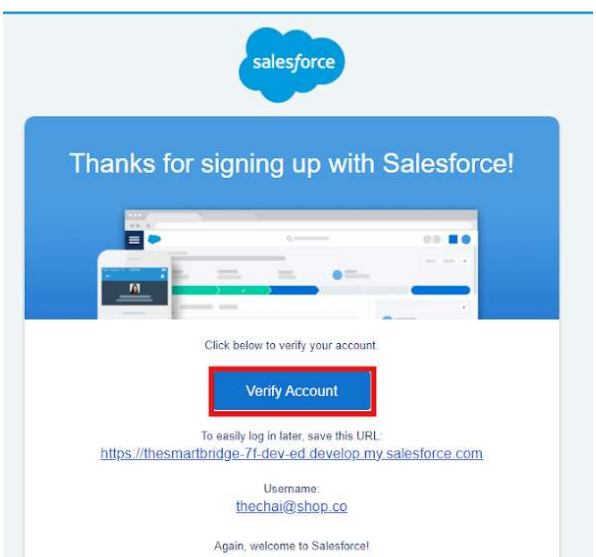
Detailed Steps to Solution Design

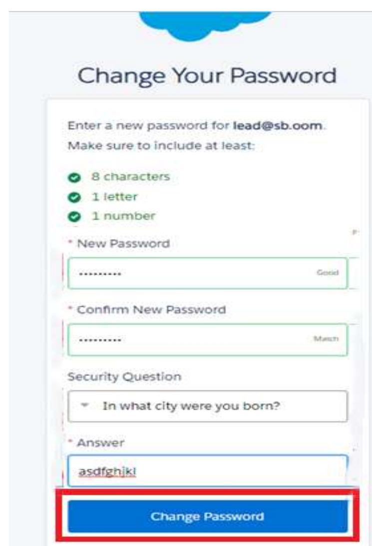
1. Salesforce developer account creation and activation:

- To create developer org:
- Go to https://developer.salesforce.com/signup
- On the sign-up form, enter the following details:

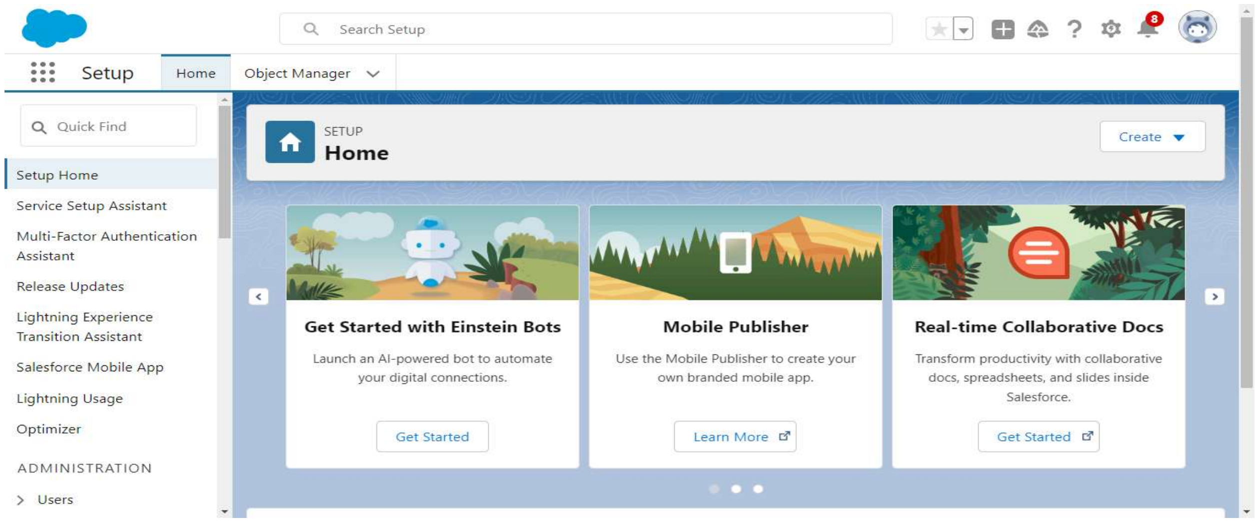


- For account activation, go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.
- Click on Verify Account.
- Give a password and answer a security question and click on change password





- Then you will redirect to your salesforce setup page.



Object

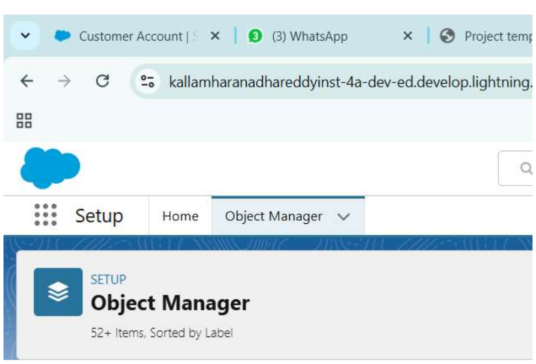
Salesforce objects are database tables that permit you to store data that is specific to an organization.

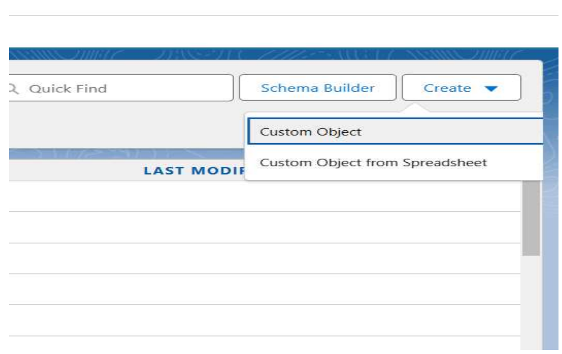
Custom Objects:

- **Employee Records**: To store employee details and work history.

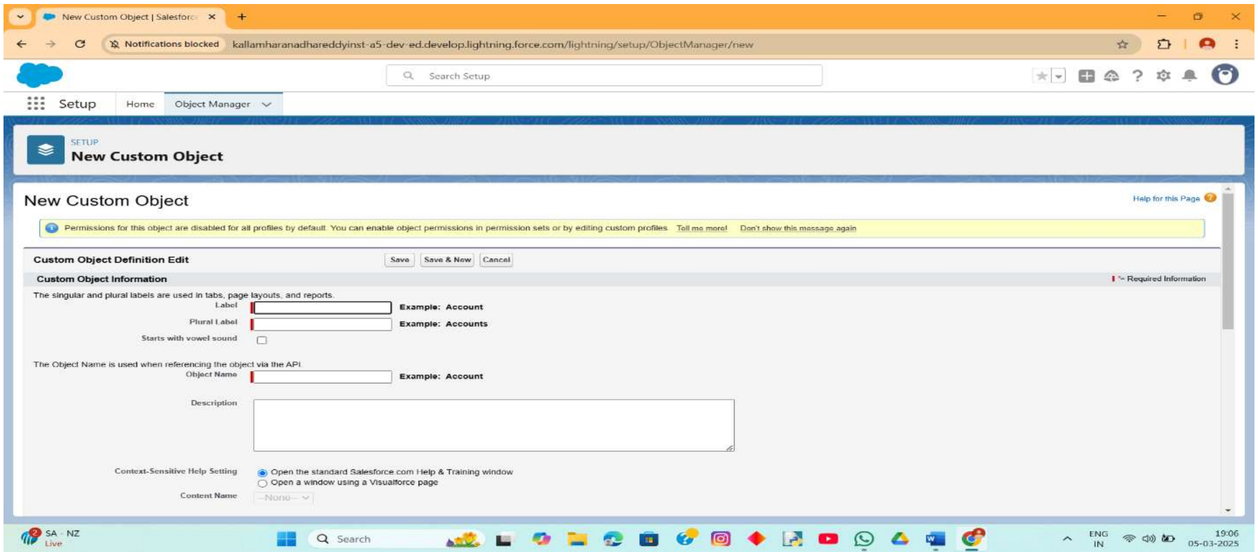
To create an object:

1. From the setup page --> Click on Object Manager --> Click on Create --> Click on Custom Object.





- Enter the label name: Employee
- Plural label name: Employees



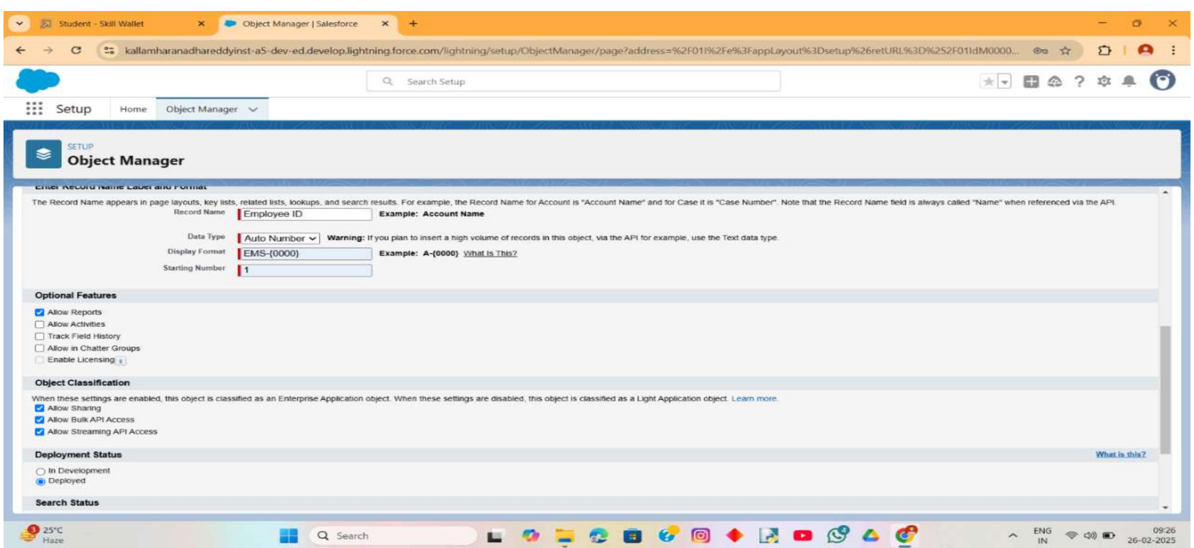
Enter Record Name Label and Format

1 Record Name: Employee ID

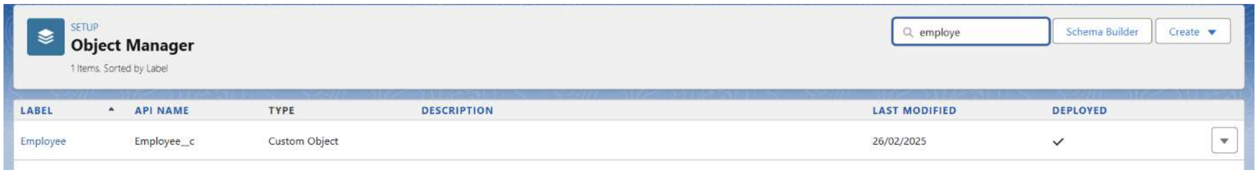
2 Data Type: Auto Number

3 Display Format: EMS - {0000}

4 Starting Number: 1



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



- **Create Project Object**

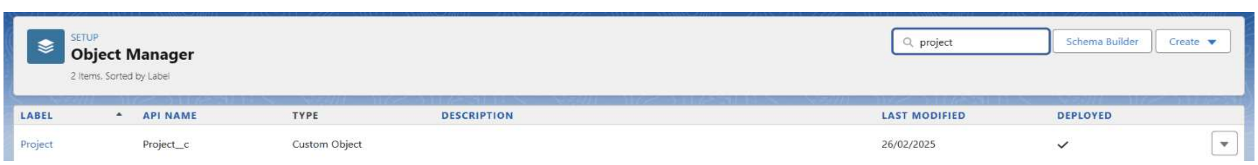
The purpose of creating a project object is to have detailed information about the on-going and completed projects in the organization.

To create an object:

1. From the setup page, Click on Object Manager ,Click on Create
   1) Enter the label name--> Project
   2) Plural label name--> Projects
   3) Enter Record Name Label and Format

- Record Name: Project ID
- Data Type: Auto Number
- Display Format: Pro - {0000}
- Starting Number: 1

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



- **Create 3 more objects with label names as Project Task, Asset, Asset Service.**

Note: use “Text” as a data type and label Record Name as “Project Task Name”.

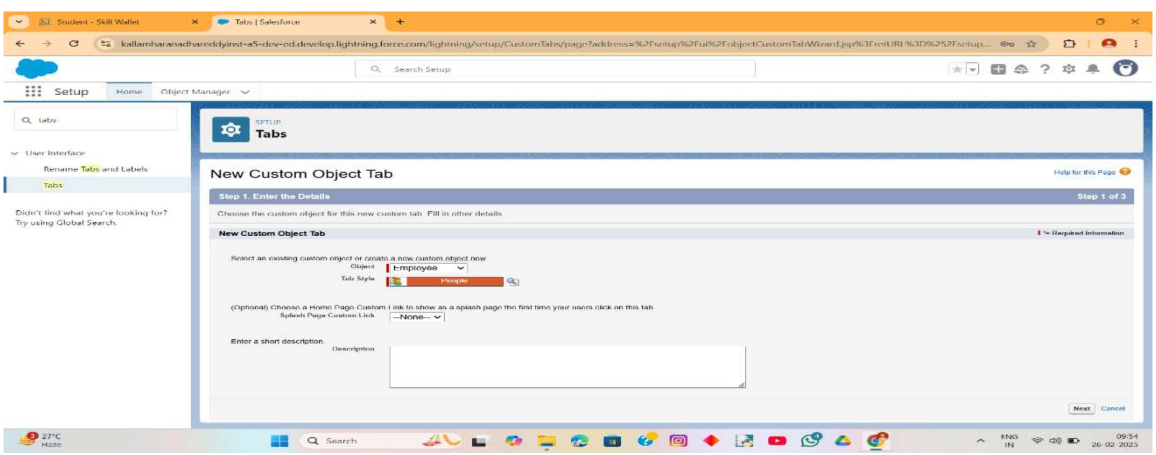
Tabs

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 (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)
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.

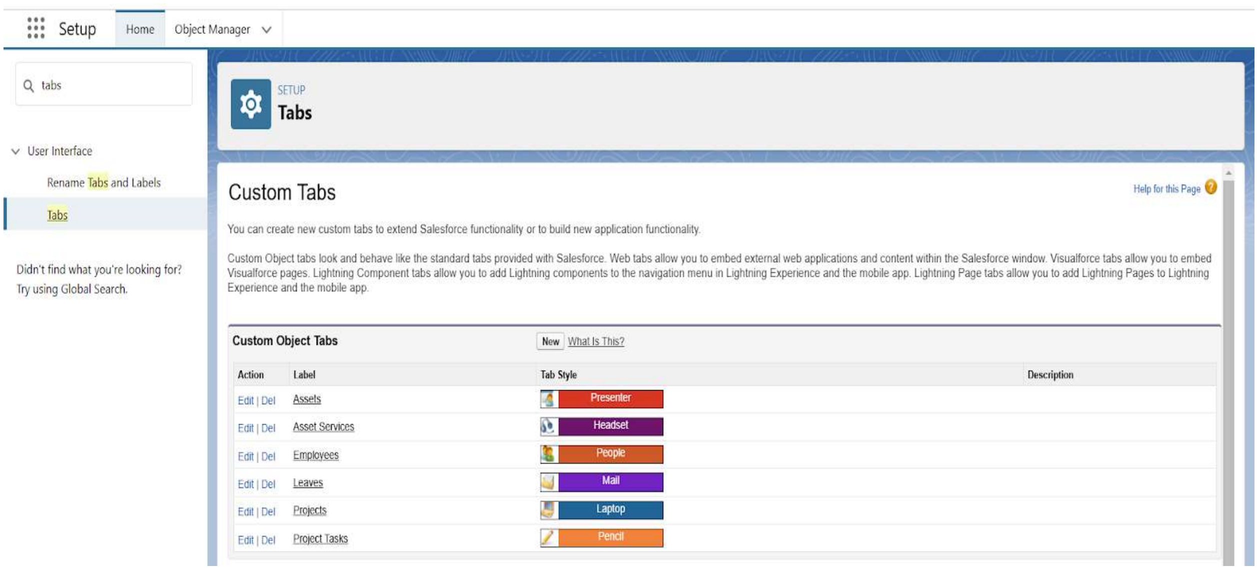


Creating a Custom Tab (Project)

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.

Creating tabs for remaining objects

Now create tabs for Project Task, Asset, Asset Service objects.



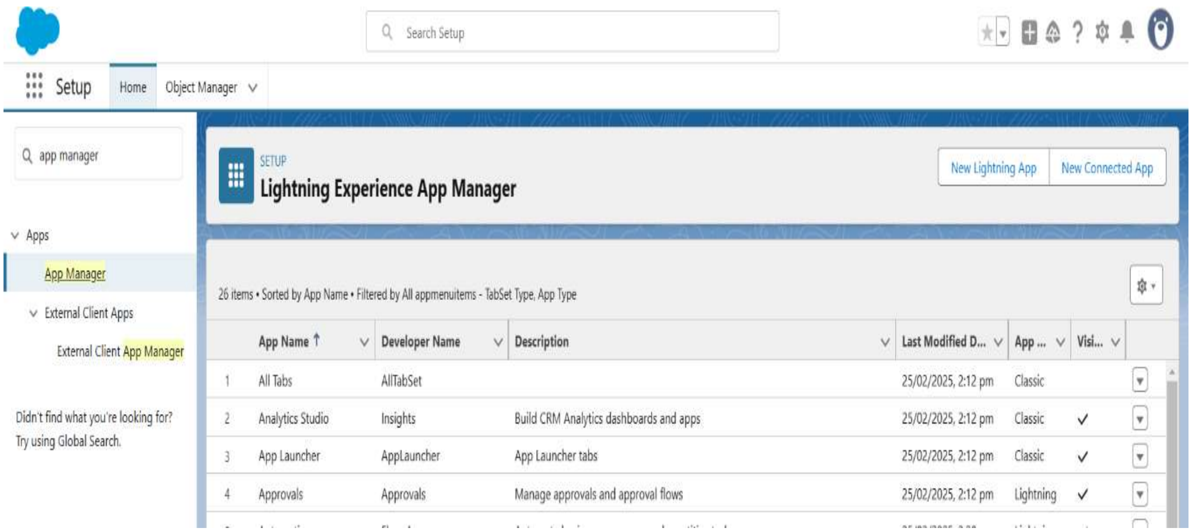
The Lightning App:

Included the objects Employees, Projects and Assets, etc.,

Create a Lightning App

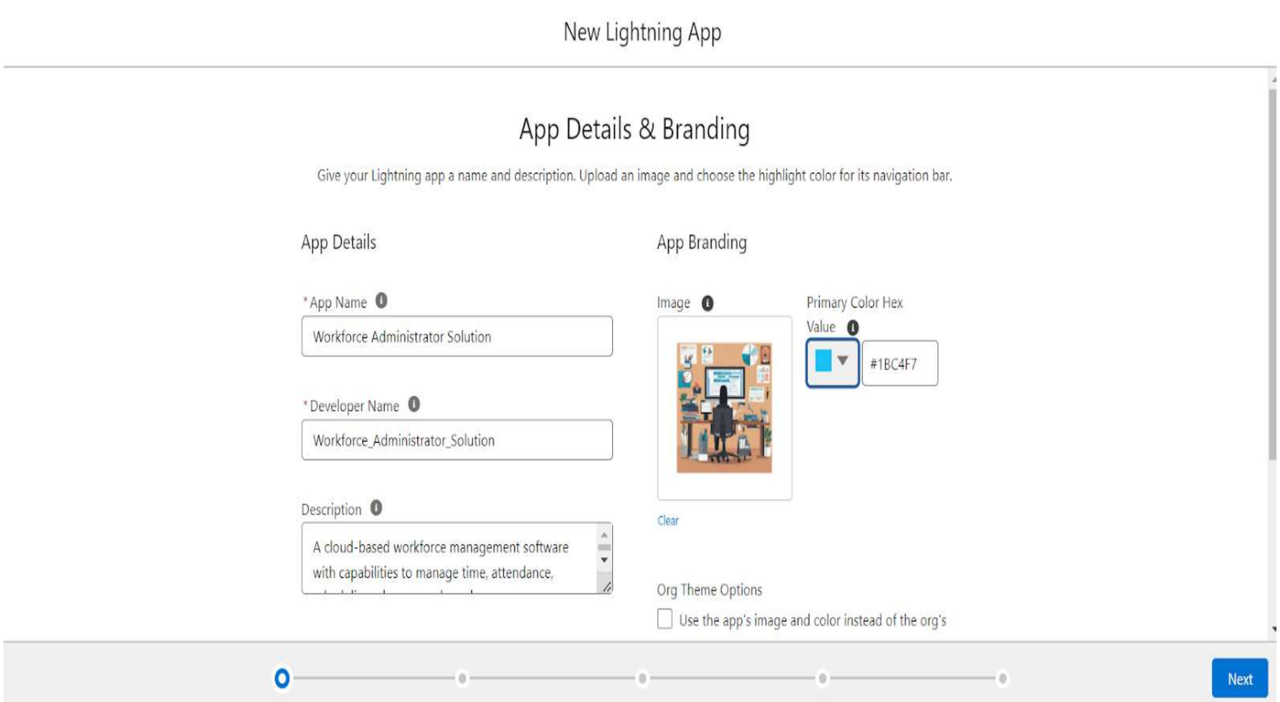
To create a lightning app page:

1. Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on new lightning App

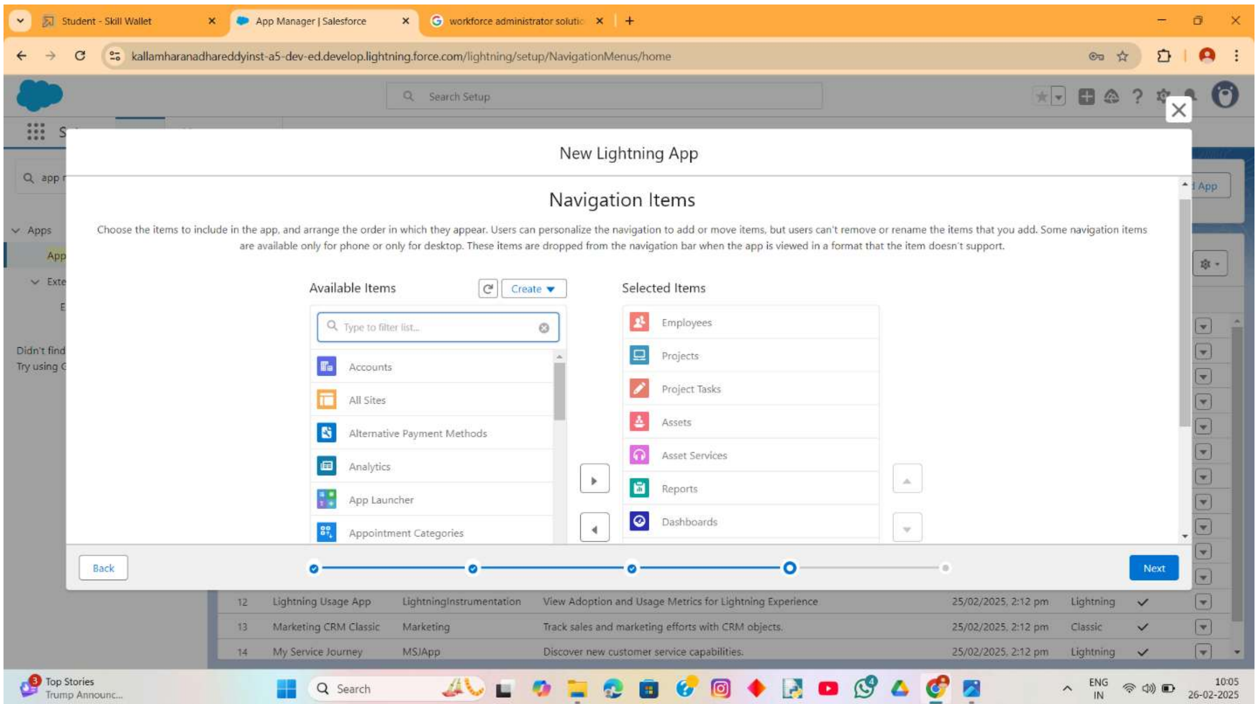


Fill the app name in app details and branding as follow
App Name: Workforce Administrator Solution
Description: Give a meaningful description
Image: optional (if you want to give any image you can otherwise not mandatory)
Primary color hex value: keep this default

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



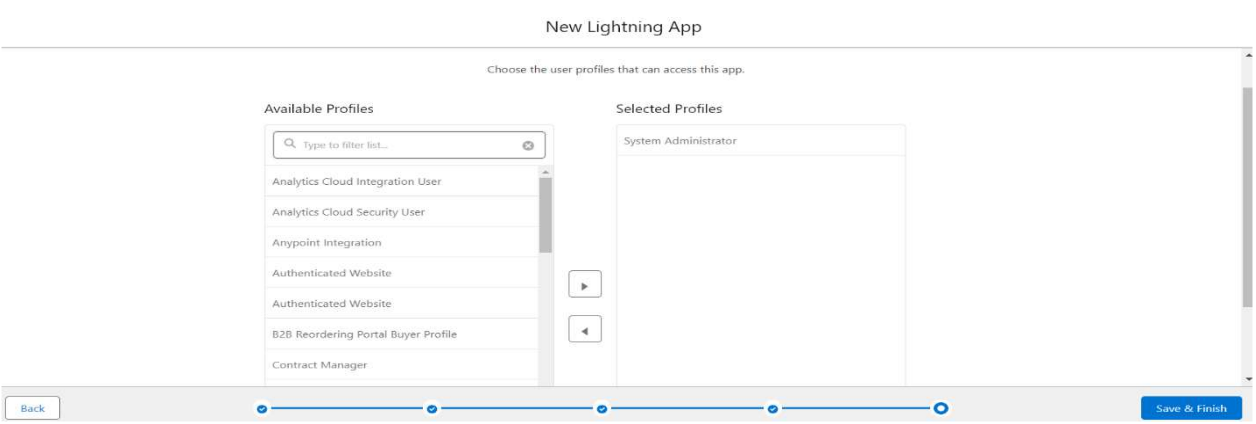
4.To Add Navigation Items:



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

5.To add user profiles

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



Fields & Relationships

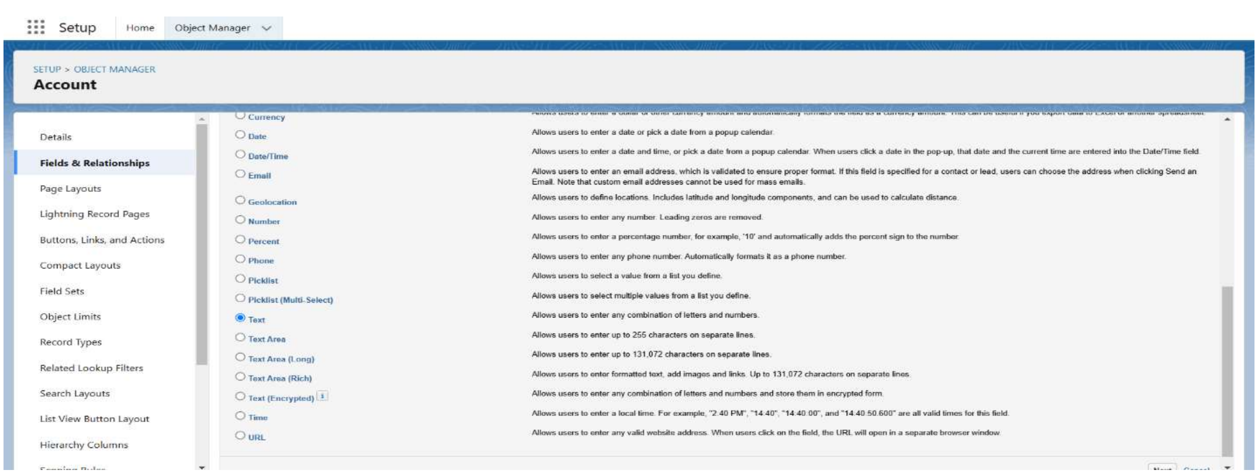
- Creating Text Field in Employee Object
  1.Go to setup, click on Object Manager, type object name(Employee) in quick find bar, click on the object.

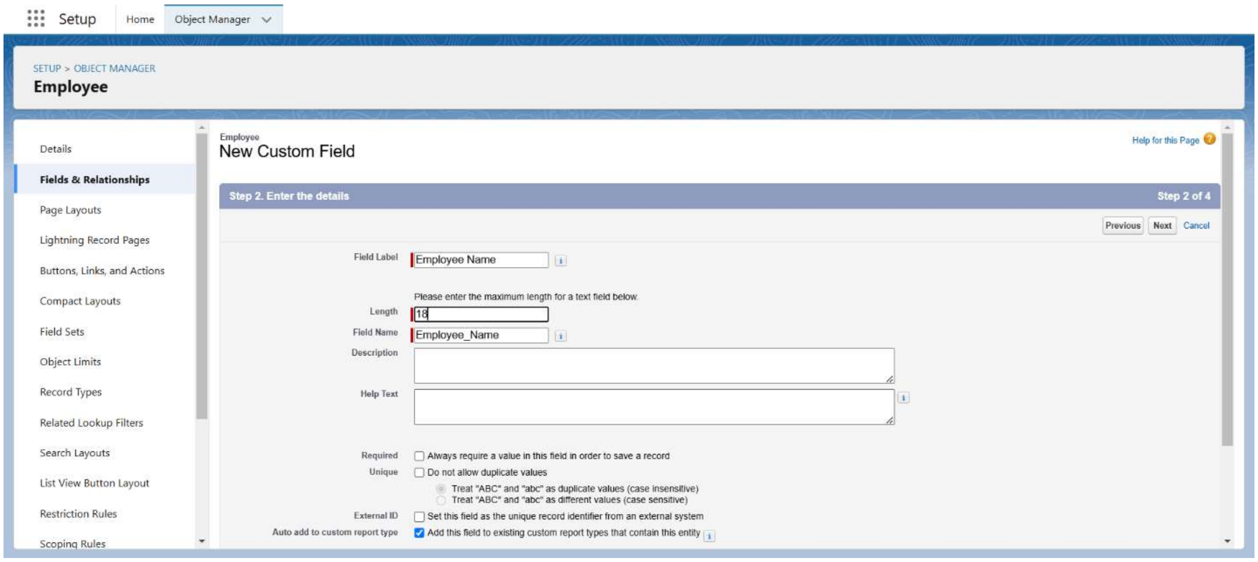
2.Now click on “Fields & Relationships”, New.

3.Select Data type as “Text” , Click On Next,

Field Label: Employee Name

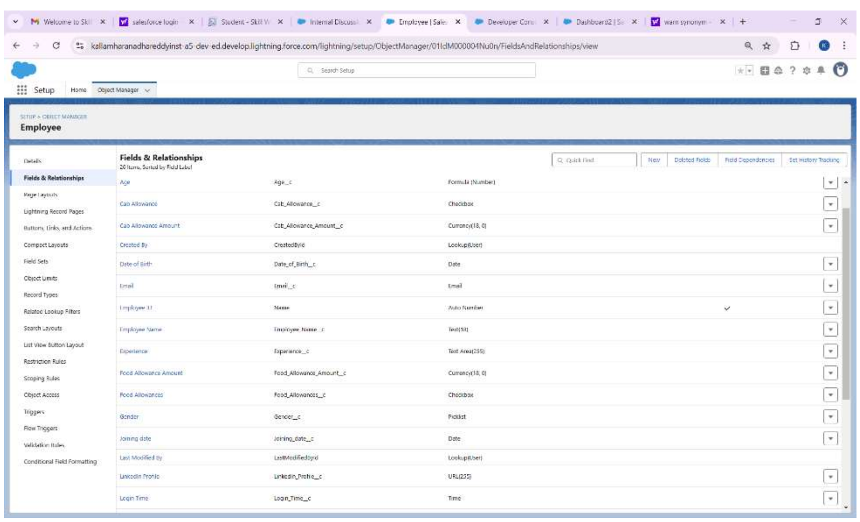
Length: 18





Click on Next, Next, Save and new.

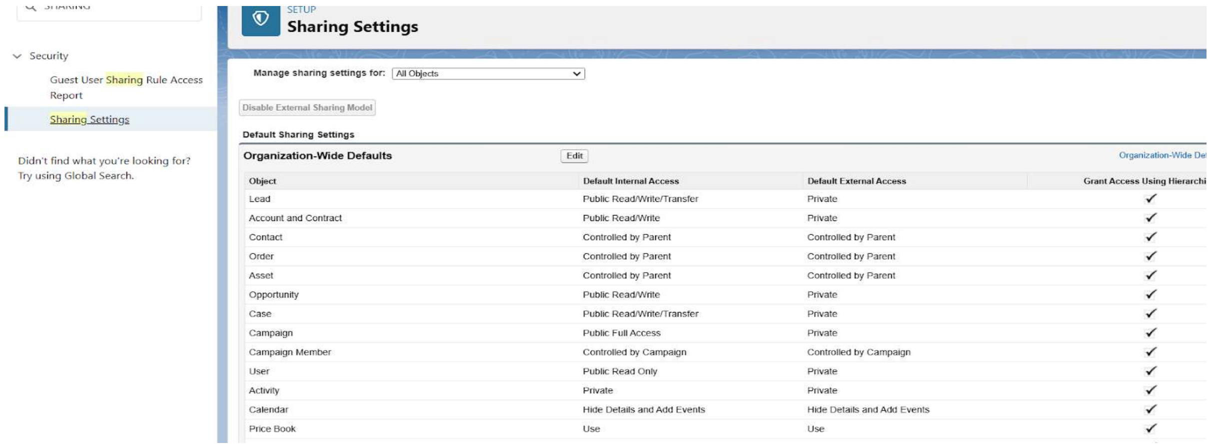
- Creating Date of Birth Field in Employee Object
- Creating Formula Field in Employee Object
- Creating Picklist Field in Employee Object
- Creating Self-Relationship Field in Employee Object
- Creating Master-Detail Relationship between Employee & Asset Object



- Creating Remaining Fields in Employee Object Employee Project, project task, assets, etc...

Setting OWD

- Create OWD (Organization-wide defaults)Setting



Object	Default Internal Access	Default External Access	Grant Access Using Hierarchi
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	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓

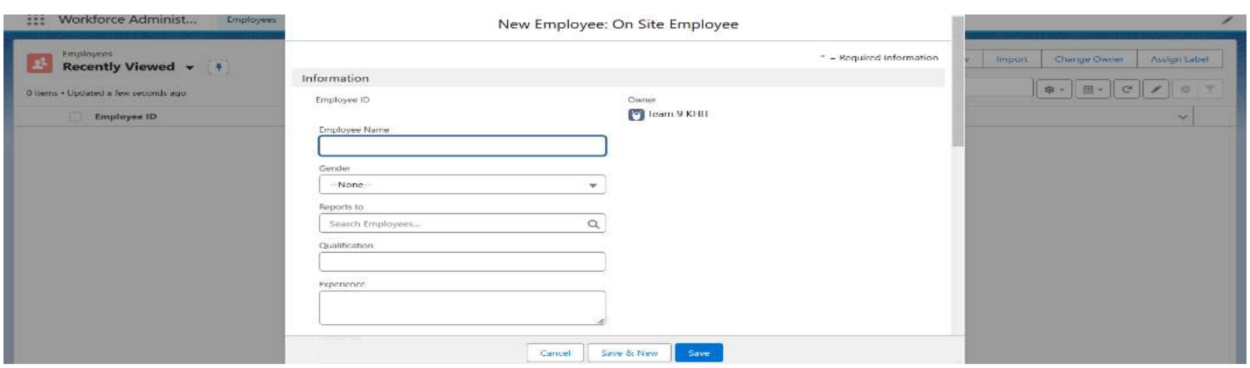
Search for the Employee object.

1. change the options to “Private” and under grant access using hierarchies select the check box.
2. Click on save.

Employee	Private	Private	✓
Leave	Public Read/Write	Private	✓
Project	Private	Private	✓
Project Task	Controlled by Parent	Controlled by Parent	

- Set OWD as Private for Project and Asset Service objects.

User Adoption



- Create a Record (Employee)

1. Click on the Employee tab.
2. Click New.
3. Fill the Details and click on Save.

- Delete a Record (Employee)
- View a Record (Employee)

Import Data

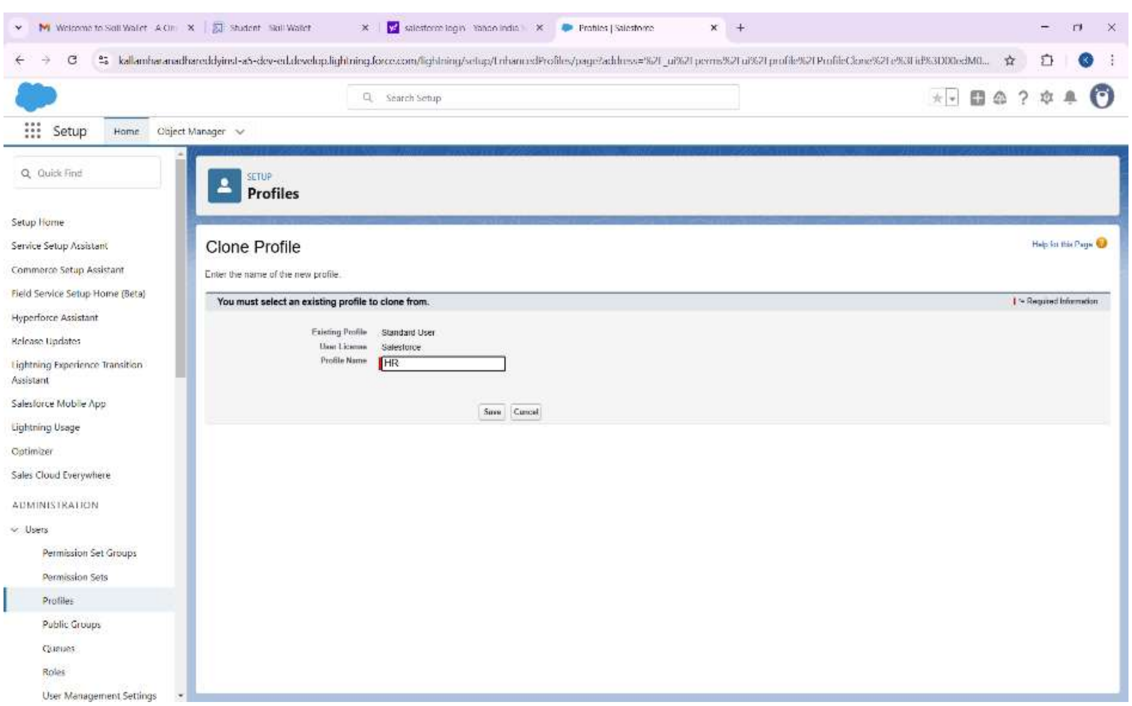
Before creating the application download this file from the URL given below and save the file in CSV.

https://tinyurl.com/SF-Employee-Data

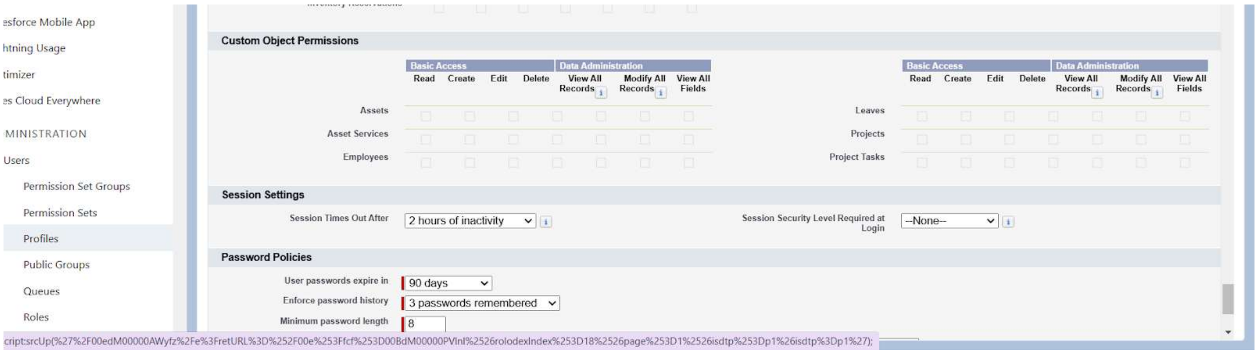
- Importing data using Data Wizard

Profiles

- **HR Profile:** creating HR profile by cloning standard user profile
- **Manager Profile:** creating Manager Profile by cloning Salesforce Platform User profile



- **Employee Profile:** Created Employee profile but just allowed permissions to access for Project and Project Task objects

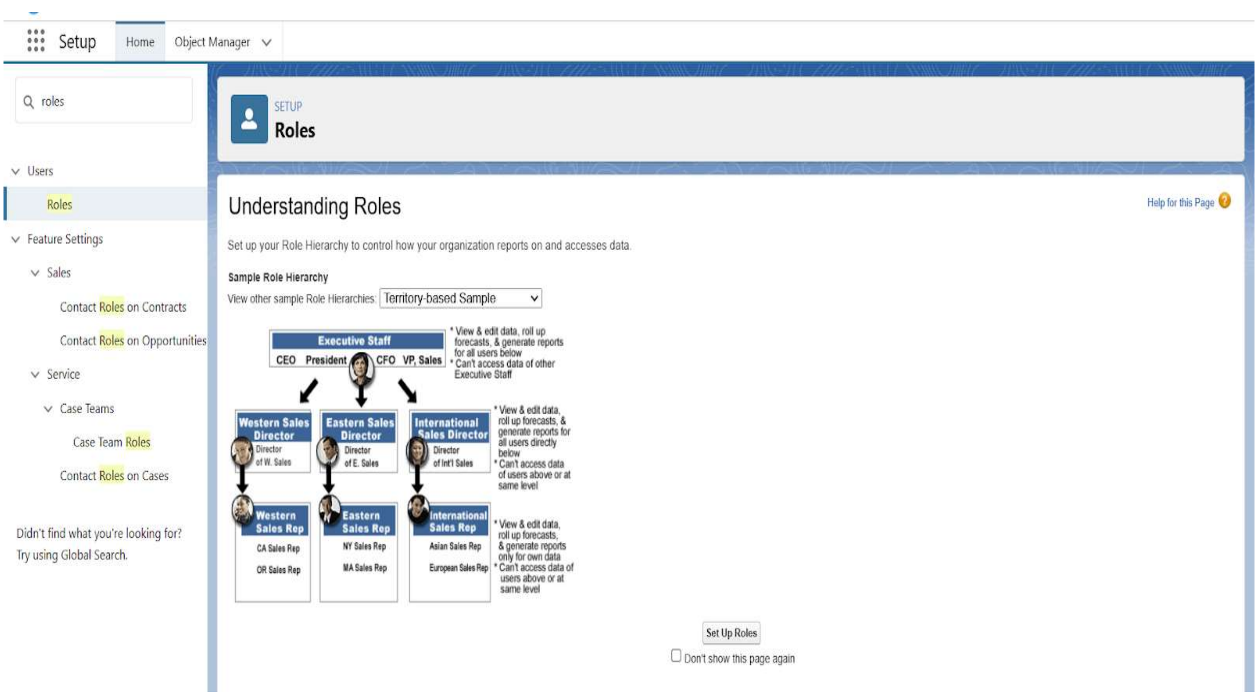


Role

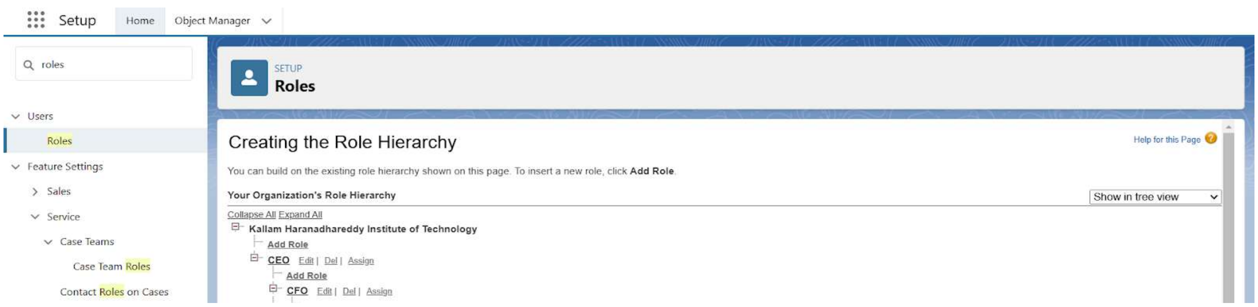
- Assigning roles is also an important Task in the process

Creating HR Role

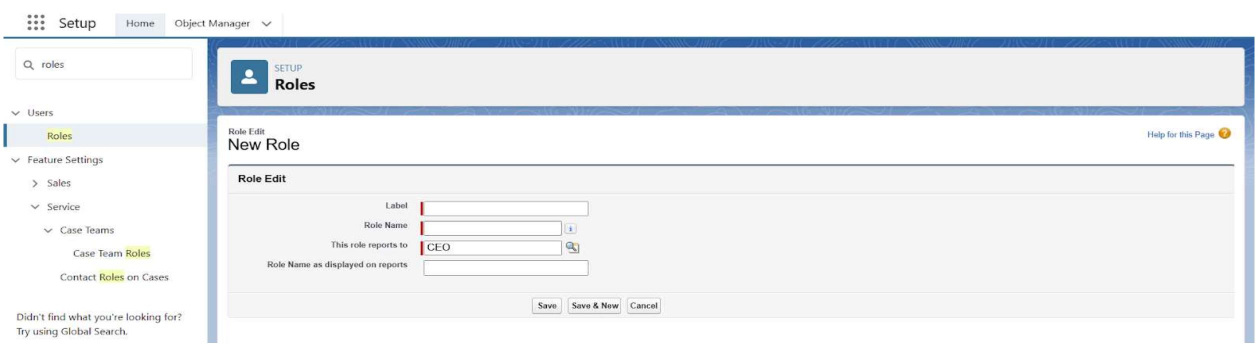
- Go to quick find, Search for Roles, click on set up roles.



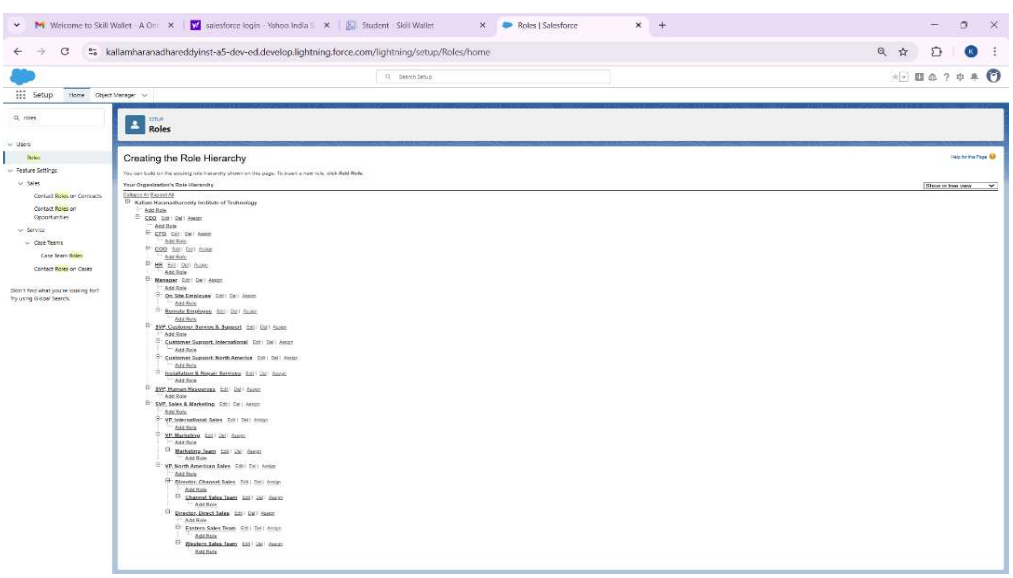
● Click on Expand All and click on add role.



● Give Label as “HR” and click on Save.

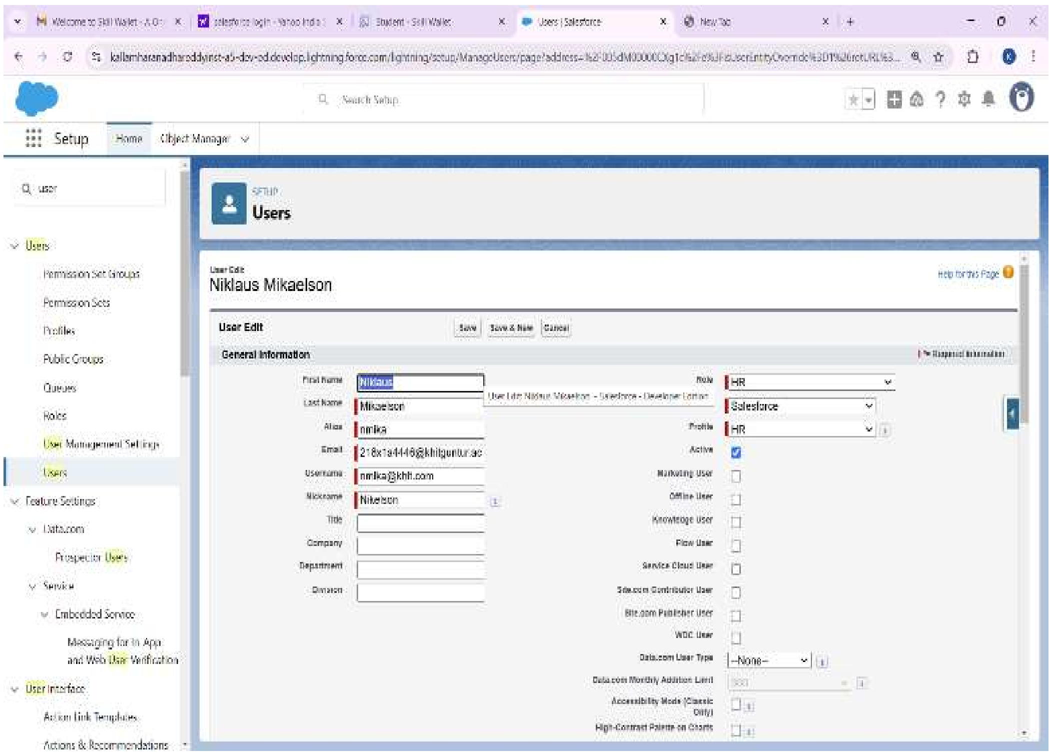


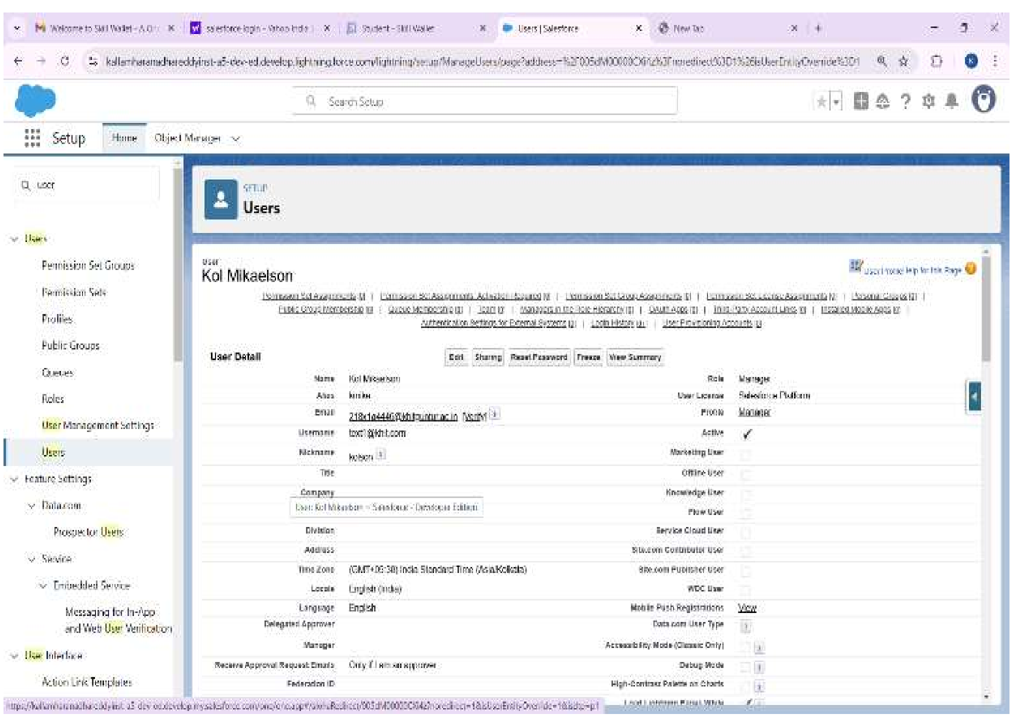
● The Roles we Created are **HR role** and **Manager Role, etc..**



Users

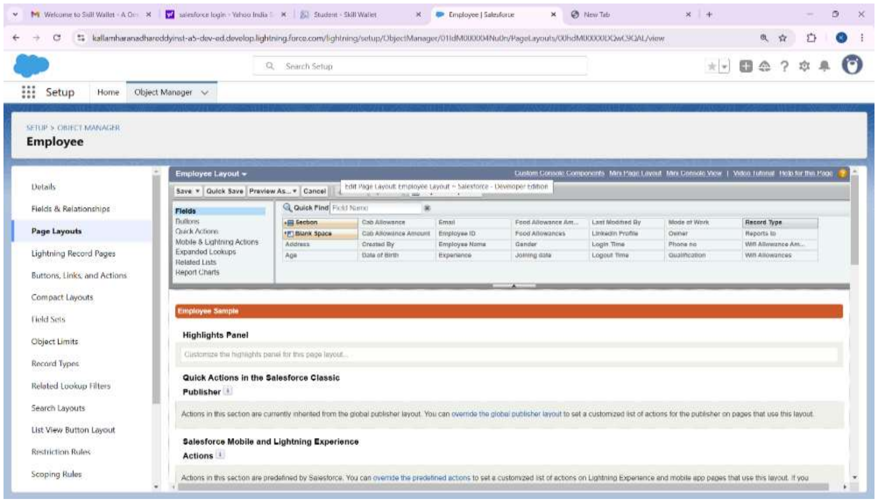
- We created the profiles in the last step so we need to assign the profiles to the new users in this Step.
- We created the user HR and assigned the User to previously created profile
- In the same way the we created User for the manager profile which was also created earlier.





Page layouts

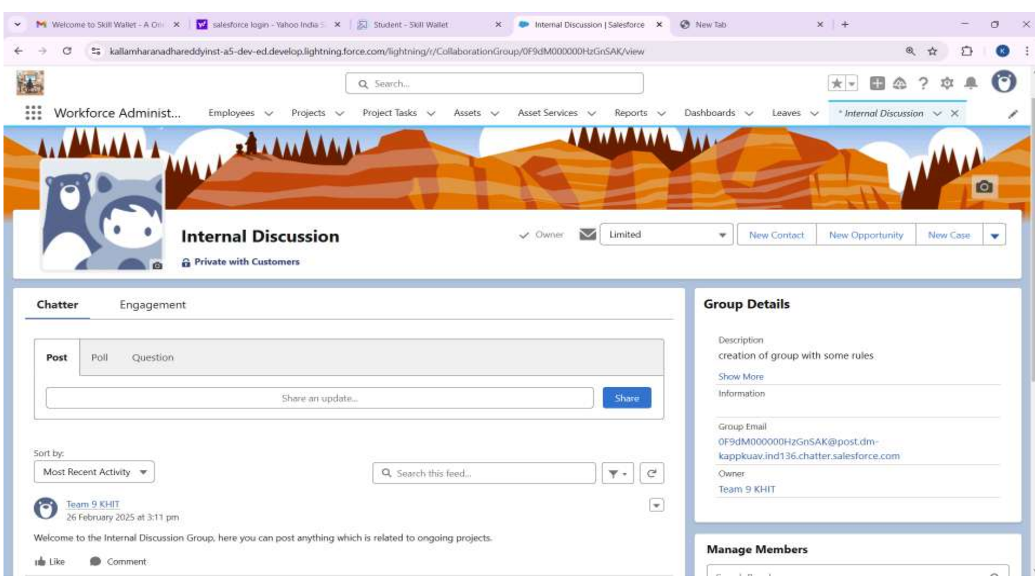
- As the Name suggests Page layout is the way of designing the certain page



- So, we reorganized the Page layout for the employee Object
- Reorganized the "Remote Employee Layout", and in the allowances section used only WIFI Allowance and WIFI Allowances Amount fields.

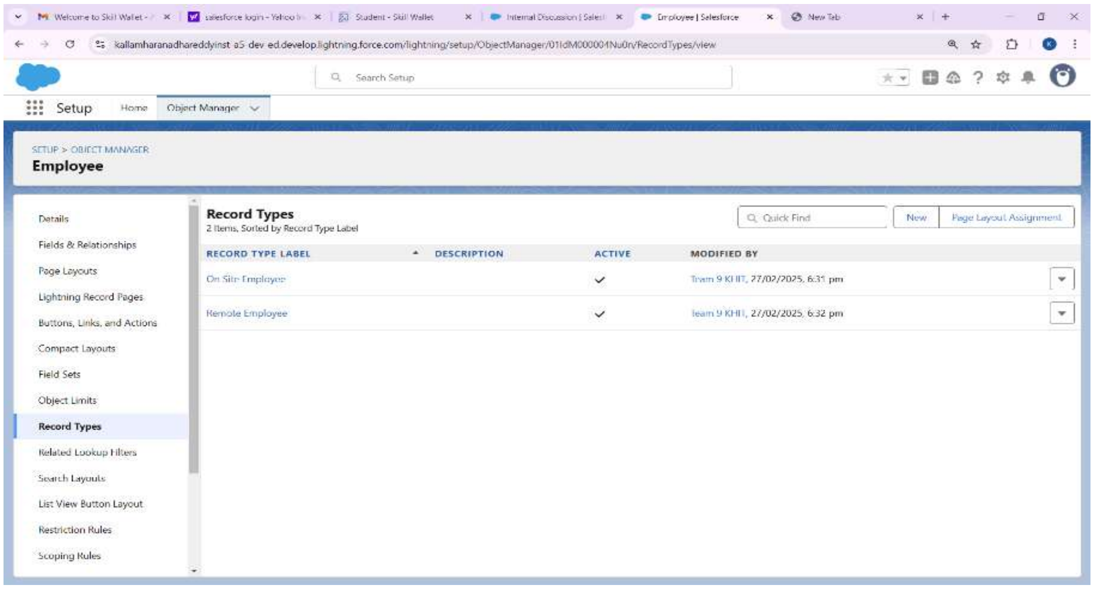
Chatter Group

- This Step Involves Creating chatter group for the Organization for Internal Communication and also Communication with Customers
- We created the group called Internal discussion and added the members of the organization to the group



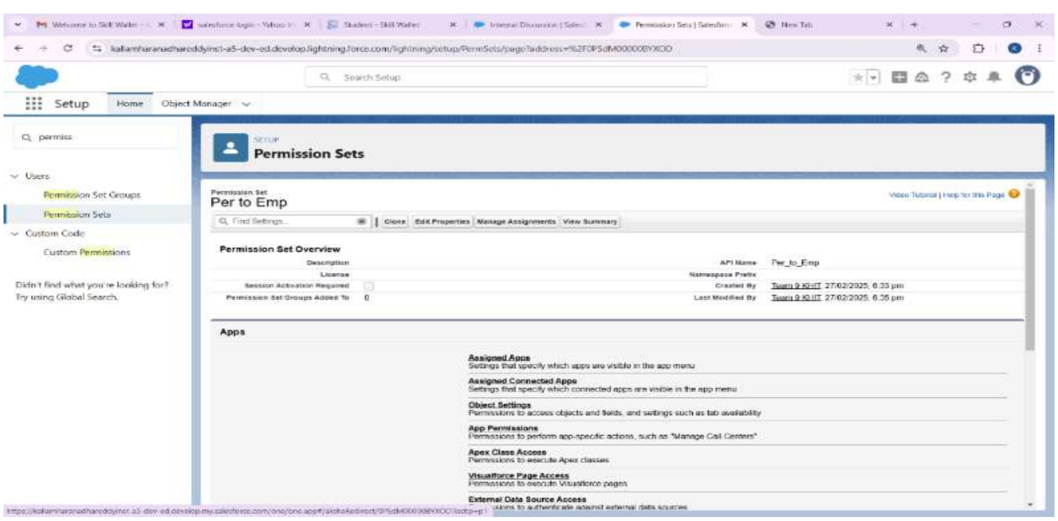
Record Types

- In this step we need to Create different forms of Employee Records Based on the mode of their work
- We Created two types of Employee Records **On-Site Employee Records** and **Remote Employee Records.**



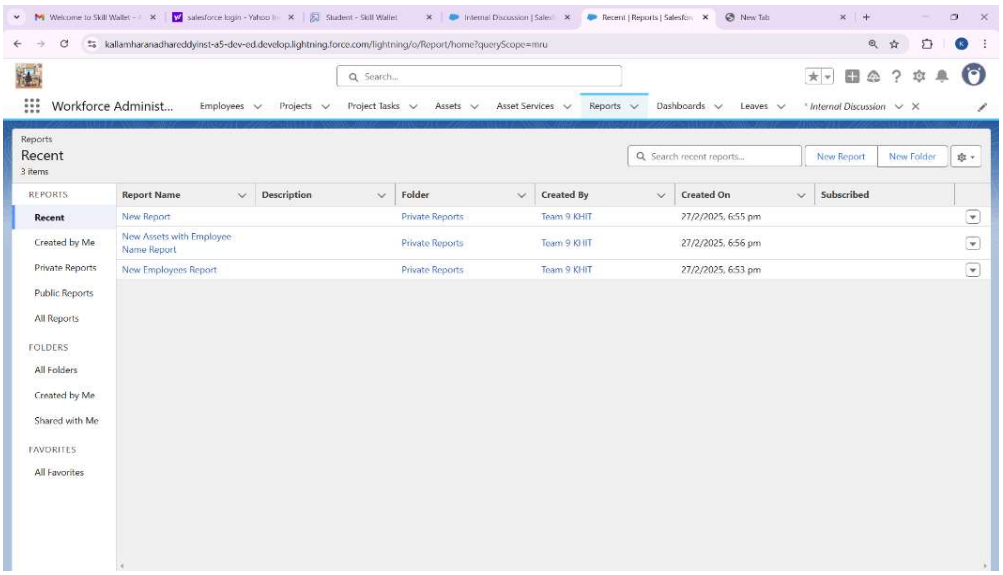
Permission sets

- Creating permission sets is one of the most Important tasks in Regulating the access of the People in Organization and Prioritizing Security.
- We created the Per to Emp Permission set for regulating Permissions to certain Users.

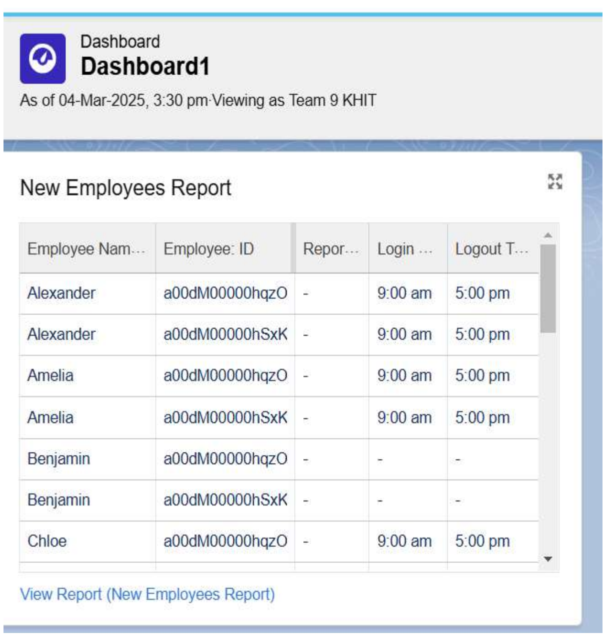


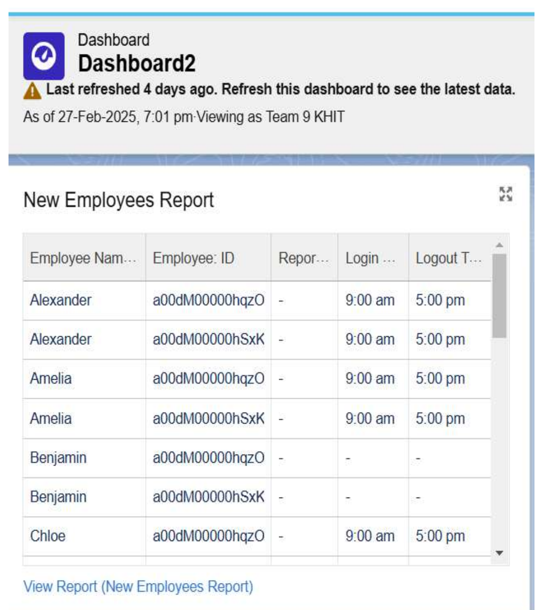
Reports and Dashboards

- We Created Reports on The **Projects assigned to the Employees** and the **assets assigned to the employees**.



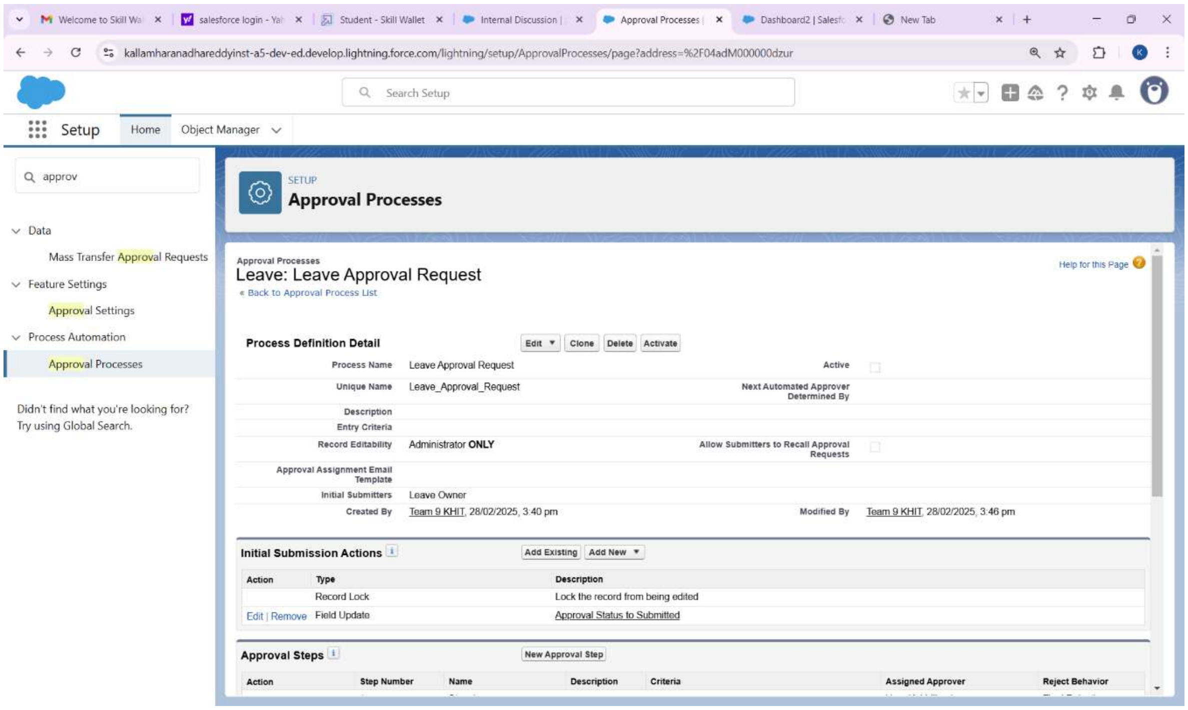
- And also, The Dashboards on the Data of the Employees





Approval Process

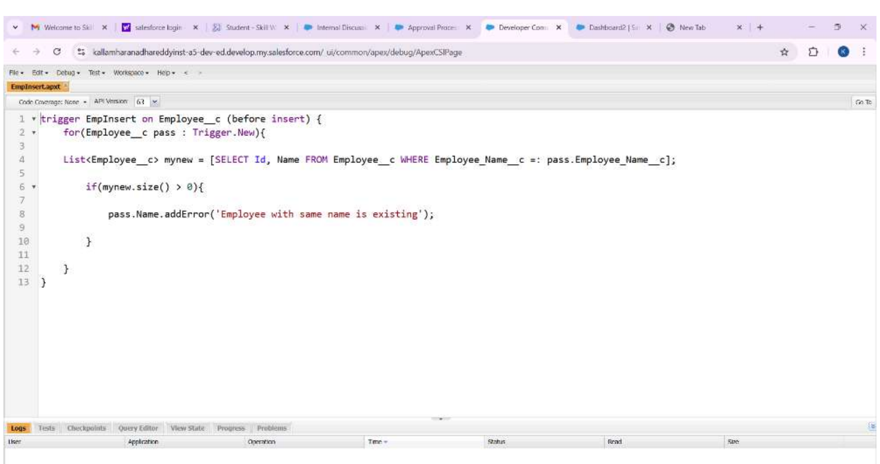
Now the step is creating the approval Processes



- Creating Leave object and Tab for it.
- Creating Approval Process for the Leave object
- Updating Approval Status and after all the process the final rejection action

Apex Trigger

- Now we are on to the last step Creating the apex trigger
- We created the apex trigger called **EmpInsert.**
- The trigger is to alert the users to not create a profile with already existing name by giving “**Employee with same name is existing**”.



Outcomes

1. **Enhanced Efficiency**: Reduced manual HR tasks, improving overall operational efficiency.
2. **Real-Time Data Access:** Provided instant access to workforce-related data for better decision-making.
3. **Improved Employee Experience:** Enabled self-service options, reducing dependency on HR for routine queries.
4. **Optimized Workforce Utilization:** Leveraged analytics to ensure optimal resource allocation.

Future Recommendations

1. **Expand Integrations:** Connect with third-party HR solutions for enhanced capabilities.
2. **Mobile Application:** Develop a mobile-friendly interface for employee self-service on the go.
3. **Gamification for Employee Engagement:** Introduce reward-based systems to boost employee participation and productivity.

Conclusion

The "Workforce Administration Solutions" project successfully leveraged Salesforce technology to enhance HR operations. By automating key workforce management tasks, the project has improved efficiency, data accessibility, and employee satisfaction. Future enhancements, such as AI integration and mobile access, will further strengthen the system’s impact and usability.