

# **Workforce Administration Solution (Admin)**

By

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## **Project Abstract**

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, the number of projects an employee is working on, tracking employee performance, and keeping record for the assets which they are assigned to.

# INDEX

Topics		Page no
Introduction	- - - - -	01
Objective	- - - - -	01
Implementation Details	- - - - -	03
Challenges & Solution	- - - - -	38
Future Recommendation	- - - - -	39
Conclusion	- - - - -	40

## **INTRODUCTION :**

The Smart Bridge organization is moving to the cloud-based Salesforce platform in order to enhance performance, simplify system administration, and secure data. The business uses Salesforce to store confidential information securely using encryption and backups, and automated data replication improves disaster recovery. Performance is optimized for quick and dependable data access thanks to the scalable cloud resources. By doing this, administrative complexity is decreased, and system administrators are free to concentrate on higher-value work, which increases output and improves overall operational efficiency.

### **Objective**

A workforce administration solution aims to achieve the following goals:

Centralized Employee Data Management: Establish a single, integrated system for handling employee data.

Project tracking: Keep tabs on how many projects each worker is engaged in. Employee performance is monitored and assessed through performance monitoring.

Asset Assignment Management: Keep track of and keep an eye on the resources allocated to your staff.

Process Automation: Simplify and automate procedures related to asset and personnel management.

Increased Efficiency: Cut down on manual labor to increase operational efficiency.

Data Accessibility: To improve decision-making, make sure that personnel and project-related data is easily accessible.

## **Methodology :**

These techniques can be applied to Salesforce in order to deploy a Workforce Administration Solution:

Custom Objects: To store and manage data, create custom objects for workers, projects, and assets.

Object Relationships: For simple tracking, use relationships to connect staff members to projects and assets.

Automation: To automate processes like asset assignment and project updates, use technologies like Workflow Rules, Process Builder, and Flows.

Dashboards and Reports: Create reports to keep an eye on project advancement and staff performance.

## Implementation Details:

The first step to create this project is "Creation of a Salesforce Developer Account"

### Activity 1: Creating Developer Account

1. Visit the signup page at <https://developer.salesforce.com>
2. Fill out the following information on the sign-up form:

**Build enterprise-quality apps fast to bring your ideas to life**

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

**Sign up for your Salesforce Developer Edition**  
A Salesforce Platform environment for free.

Complete the form to get access to the Salesforce Developer Edition.

First Name\*  
Your first name

Last Name\*  
Your last name

Email\*  
Your email address

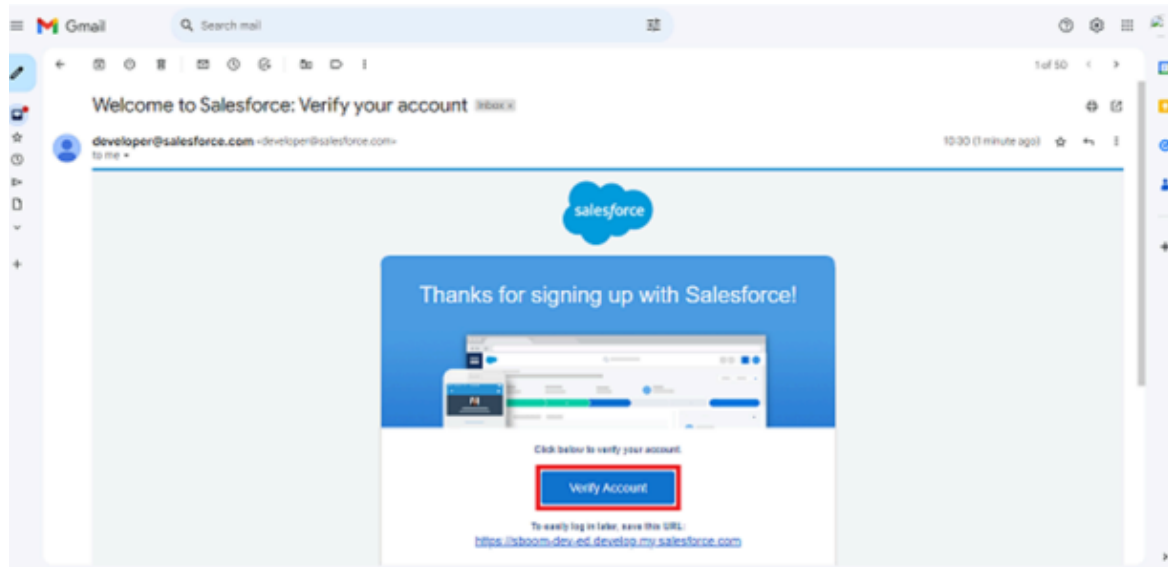
Role\*  
Your job role

Company\*  
Company Name

Country/Region\*

### Activity 2: Account Activation

1. Access the inbox using the email address you used to register. To activate your account, click the "Verify Account" button. It could take five to ten minutes to send the email.



2. Select "Verify Account."
3. Enter your password, respond to the security question, and then select "Change Password."
4. Then you will redirect to your salesforce setup page.

# TASK 1:

## Object

What Constitutes an Object?

Database tables known as Salesforce objects let you store information unique to a company.

Which kinds of items are there in Salesforce?

There are two kinds of Salesforce objects:

1. Standard Objects: Salesforce.com provides users, contracts, reports, dashboards, and other types of objects as standard objects.
2. Custom Objects: Objects generated by users are known as custom objects. They provide information that is special to them and vital to their business. They serve as the center of every application and offer a framework for data sharing.

## Activity 1: Create Employee Object

To create an object:

1. From the setup page --> Click on Object Manager --> Click on Create --> Click on Custom Object.
2. Click on Allow reports,
3. Allow search --> Save.

## Activity 2: Create Project Object

Having comprehensive data on the organization's ongoing and finished projects is the goal of developing a project object.

To create an object:

1. From the setup page --> Click on Object Manager --> Click on Create --> Click on
2. Click on Allow reports,
3. Allow search --> Save

## Activity 3:

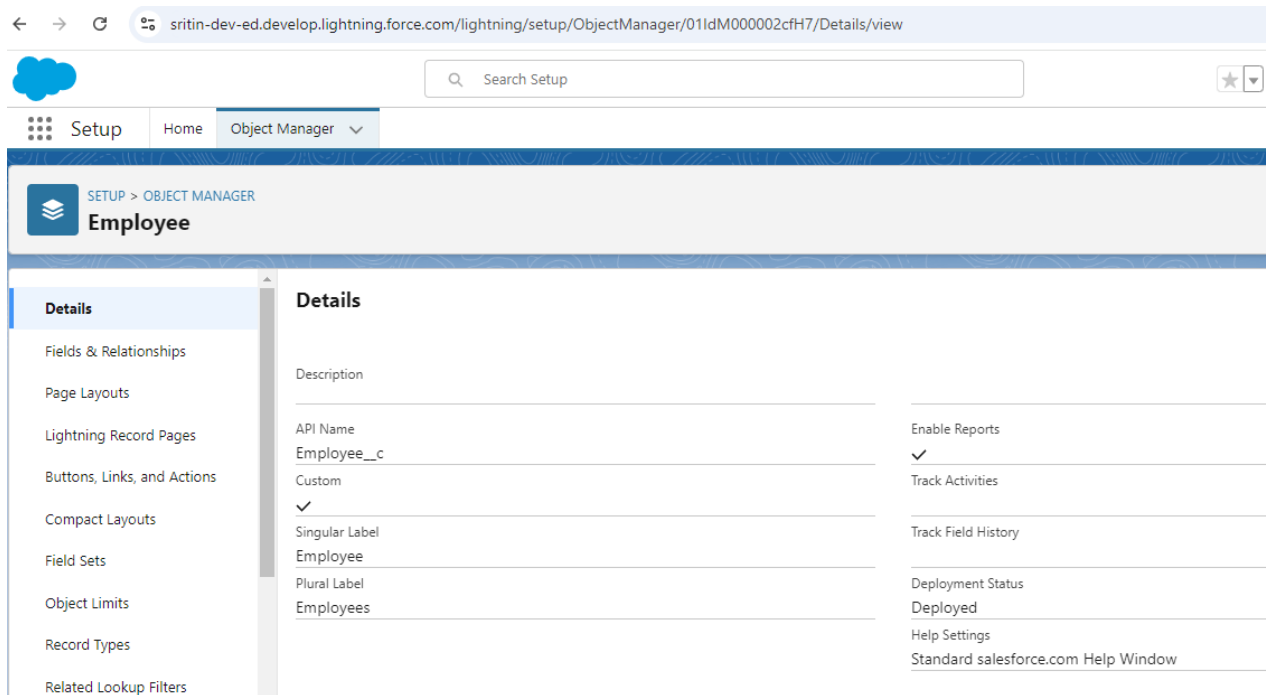
Create 3 more objects with label names as ProjectTask, Asset, Asset Service.

By following activity-2 steps, created 3 more objects.



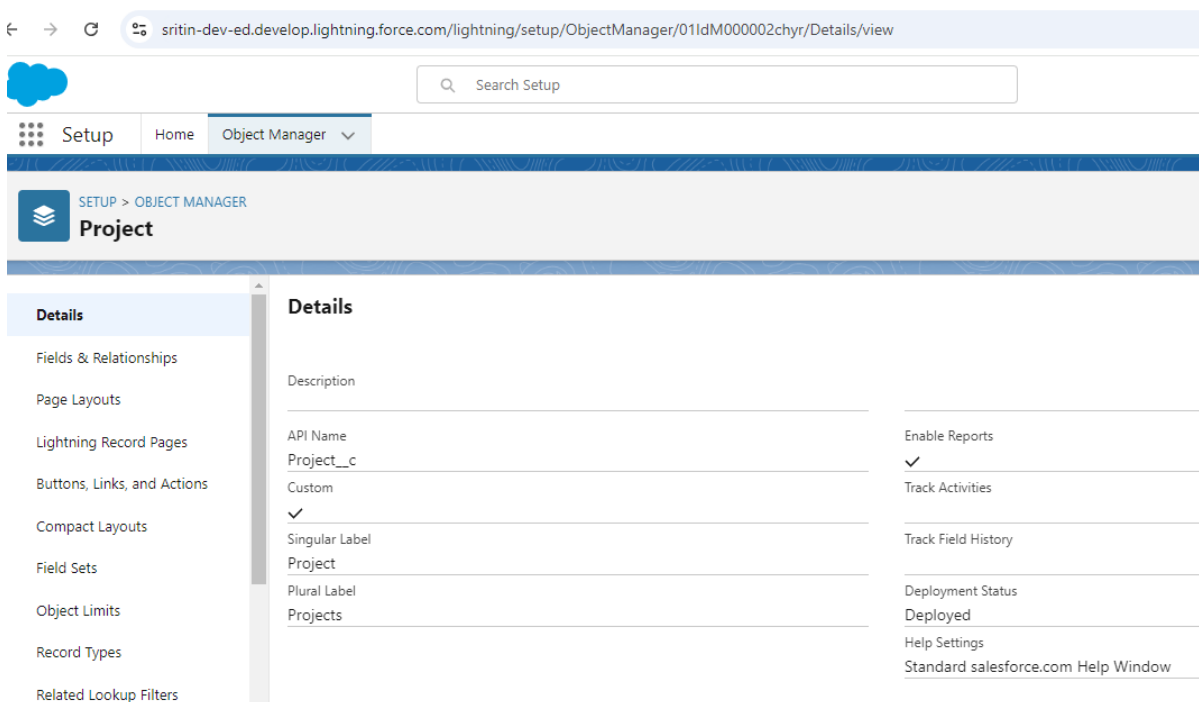
## Output of Task 1:

Employee Object output:



The screenshot shows the Salesforce Setup interface for the 'Employee' object. The browser address bar displays the URL: `sritin-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldM000002cfH7/Details/view`. The page header includes the Salesforce logo, a search bar labeled 'Search Setup', and navigation tabs for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'SETUP > OBJECT MANAGER Employee'. On the left, a sidebar lists various configuration options under the 'Details' section: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main panel displays the 'Details' for the 'Employee' object, including a description field, API Name 'Employee\_\_c', Custom status (checked), Singular Label 'Employee', Plural Label 'Employees', and a list of settings: Enable Reports (checked), Track Activities, Track Field History, Deployment Status 'Deployed', Help Settings, and a link to the Standard salesforce.com Help Window.

Project Object output:



The screenshot shows the Salesforce Setup interface for the 'Project' object. The browser address bar displays the URL: `sritin-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldM000002chyr/Details/view`. The page header includes the Salesforce logo, a search bar labeled 'Search Setup', and navigation tabs for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'SETUP > OBJECT MANAGER Project'. On the left, a sidebar lists various configuration options under the 'Details' section: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main panel displays the 'Details' for the 'Project' object, including a description field, API Name 'Project\_\_c', Custom status (checked), Singular Label 'Project', Plural Label 'Projects', and a list of settings: Enable Reports (checked), Track Activities, Track Field History, Deployment Status 'Deployed', Help Settings, and a link to the Standard salesforce.com Help Window.

## Project and ProjectTask Objects:

The screenshot shows the Salesforce Object Manager interface. The breadcrumb navigation is "Setup > Object Manager". A search bar contains the text "project". Below the search bar, there are two buttons: "Schema Builder" and "Create". The main content area displays a table with two objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Project	Project__c	Custom Object		25/09/2024	✓
ProjectTask	ProjectTask__c	Custom Object		25/09/2024	✓

## Asset object :

The screenshot shows the Salesforce Object Manager interface for the "Asset" object. The breadcrumb navigation is "Setup > OBJECT MANAGER > Asset". The left sidebar contains a list of configuration options: "Details", "Fields & Relationships", "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", "Compact Layouts", "Field Sets", "Object Limits", "Record Types", and "Related Lookup Filters". The main content area displays the "Details" for the "Asset" object:

Details	
Description	
API Name	Asset__c
Custom	✓
Singular Label	Asset
Plural Label	Assets
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	
Standard salesforce.com Help Window	

## **Task 2:**

### **Tabs:**

A tab functions similarly to a user interface and is utilized for creating records for objects as well as viewing the records within those objects.

Tab Types:

1. Individual Tabs Salesforce.com's custom object tabs serve as the user interface for custom apps that you create. They have the same appearance and functionality as common salesforce.com tabs like contacts, opportunities, and accounts.
2. Online Tabs Custom tabs known as "Web Tabs" are used to show web apps or material embedded within the Salesforce.com window. With web tabs, users can rapidly access applications and content they regularly use without ever leaving the salesforce.com application.

### **Activity 1: Creating a Custom Tab (Employee)**

To create a Tab:(Employee)

1. Go to setup page --> type Tabs in the 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.

### **Activity 2: 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. Output:

### **Activity 3: Creating tabs for remaining objects**

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

Project Task: Output: Asset: Output: Asset service:

# Output:

The screenshot shows the Salesforce Setup interface for Custom Tabs. The browser address bar displays the URL: `sritin-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home`. The page header includes the Salesforce logo, a search bar labeled "Search Setup", and navigation tabs for "Setup", "Home", and "Object Manager". A left sidebar contains a search bar with "tabs" and a list of items under "User Interface", including "Rename Tabs and Labels" and "Tabs". The main content area is titled "Custom Tabs" and includes a "Help for this Page" link. Below the title, there is a descriptive paragraph and a table of Custom Object Tabs.

**Custom Tabs**

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Assets</a>	Apple	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Asset Services</a>	Gears	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Employees</a>	Alarm clock	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">ProjectTasks</a>	Airplane	

# The Lightning App:

## Activity 1: Create a Lightning App

To create a lightning app page:

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

Developer Name : this will auto populated

Description : Give a meaningful description

Image : optional (if you want to give any image you can otherwise not mandatory)

Primarycolor hex value : keep this default

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

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 arrowbutton -> Next.

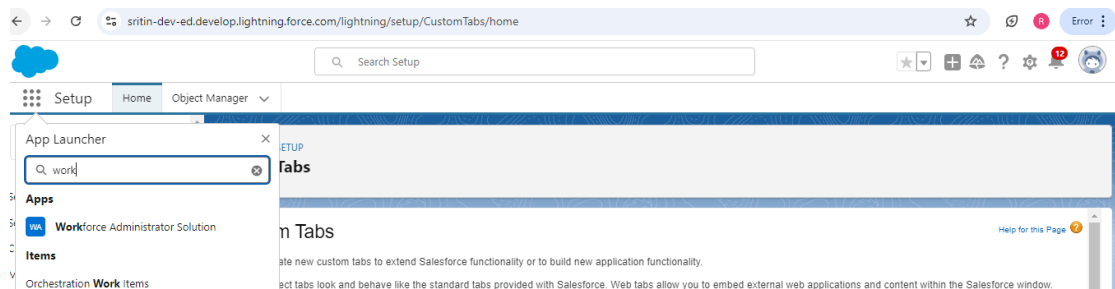
Note: select asset the custom object which we have created in the previous activity.

To Add User Profiles:

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

## Output:

Workforce Administrator Solution App created



# Fields & Relationships

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

## Types of Fields

1. Standard Fields
2. Custom Fields

## Use Case

Now it's time for you to think out of the box for your organization. You have successfully created the database objects for the organization but now all eyes turn on you as you have to define what sort of information the objects store which you have created. As a life saver of your organization you come up with the idea of creating fields to store different types of data.

### Activity 1 : Creating Text Field in Employee Object

To create fields in an 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".
4. Click on Next
5. Fill the above as following:
  - a. Field Label: Employee Name
  - b. Length : 18
  - c. Field Name : gets auto generated
  - d. Click on Next -> Next -> Save and new.

## **Activity 2 :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.
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.

## **Activity 3 : 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 FieldName as “Age” and select formula return type as “Number”and click next.
4. Under Advanced Formula write down the formula and click “Check Syntax” and Next -> Next-> Save & New.

## **Activity 4 : 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.
4. Click Next -> Next -> Next -> Save & New.

## **Activity 5 : Creating Self-Relationship**

### **Field in Employee Object**

- a. Repeat step 1 and 2 mentioned in activity 1
- b. Select Data type as "Lookup Relationship" and click Next.
- c. Select Employee from the drop down related to the field and click Next.
- d. Give Field Label as "Reports to" and click Next.
- e. Next -> Next -> Save & New.

## **Activity 6 : 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.
- Next -> Next -> Save & New.

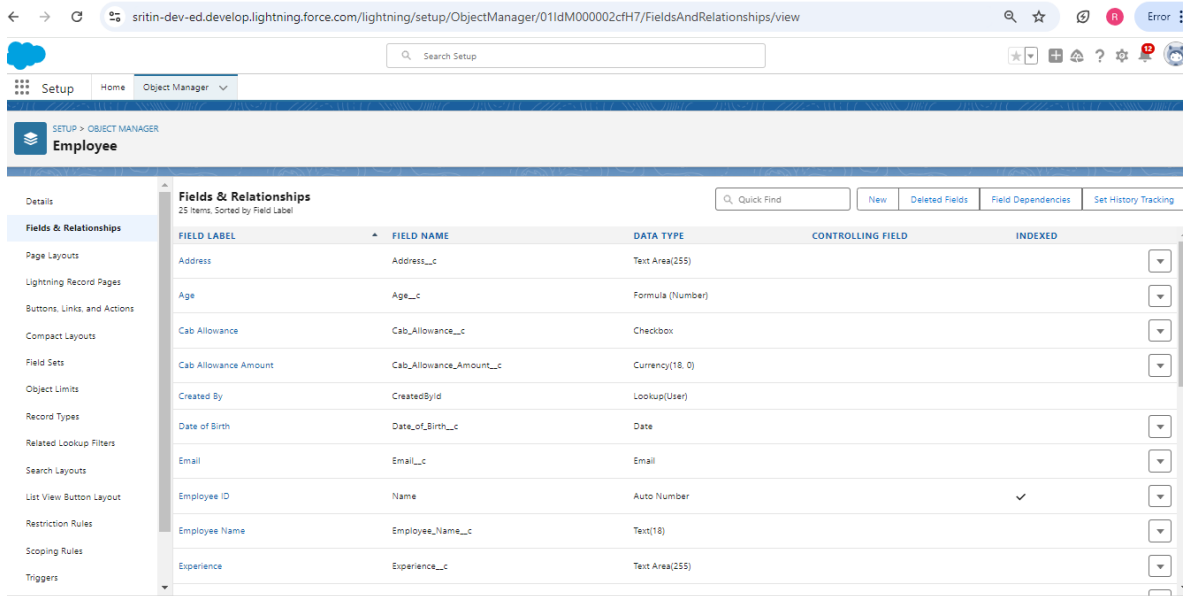
## **Activity 7 : Creating Remaining Fields in Employee Object**

Now create the remaining fields using the data types mentioned Employee, Project, Project Task, Asset Service, Asset.



# Outputs:

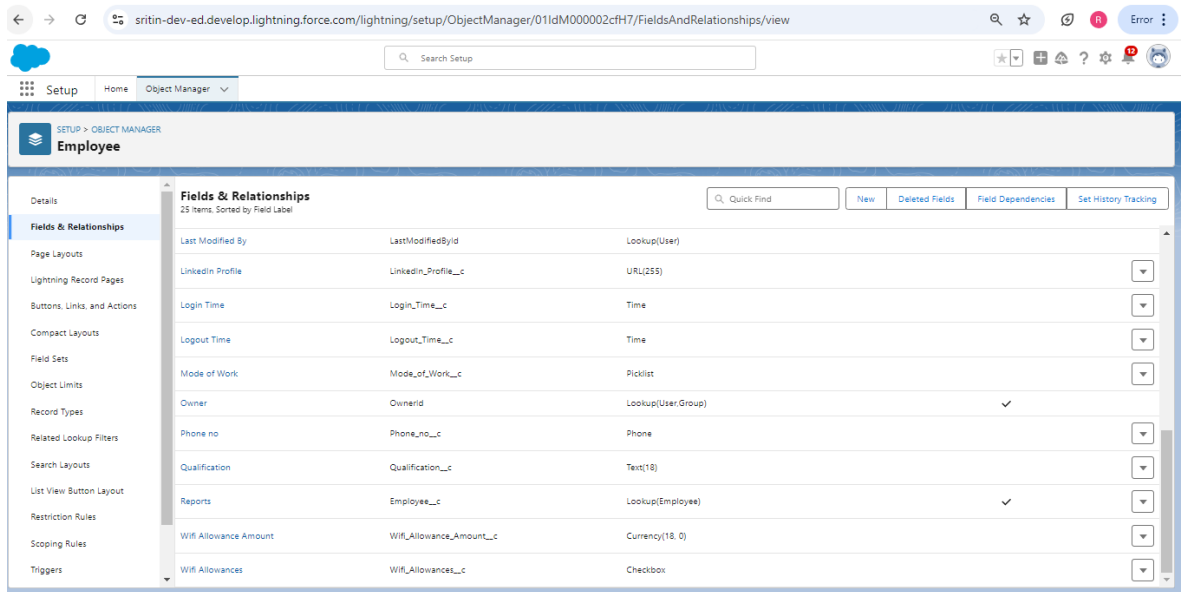
## Fields in Employee object:



Fields & Relationships

25 Items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Age	Age__c	Formula (Number)		
Cab Allowance	Cab_Allowance__c	Checkbox		
Cab Allowance Amount	Cab_Allowance_Amount__c	Currency(18, 0)		
Created By	CreatedById	Lookup(User)		
Date of Birth	Date_of_Birth__c	Date		
Email	Email__c	Email		
Employee ID	Name	Auto Number		✓
Employee Name	Employee_Name__c	Text(18)		
Experience	Experience__c	Text Area(255)		



Fields & Relationships

25 Items. Sorted by Field Label

Last Modified By	LastModifiedById	Lookup(User)		
LinkedIn Profile	LinkedIn_Profile__c	URL(255)		
Login Time	Login_Time__c	Time		
Logout Time	Logout_Time__c	Time		
Mode of Work	Mode_of_Work__c	Picklist		
Owner	OwnerId	Lookup(User/Group)		✓
Phone no	Phone_no__c	Phone		
Qualification	Qualification__c	Text(18)		
Reports	Employee__c	Lookup(Employee)		✓
WIR Allowance Amount	WIR_Allowance_Amount__c	Currency(18, 0)		
WIR Allowances	WIR_Allowances__c	Checkbox		

## Fields in Project Task object:

Browser address bar: [sritin-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000002cfaT/FieldsAndRelationships/view](https://sritin-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000002cfaT/FieldsAndRelationships/view)

Setup > Object Manager > ProjectTask

**Fields & Relationships**  
6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Employee Name	Employee_Name__c	Master-Detail(Employee)		✓
Finishes in	Finishes_in__c	Formula (Number)		
Last Modified By	LastModifiedById	Lookup(User)		
ProjectTask	ProjectTask__c	Master-Detail(Project)		✓
ProjectTask Name	Name	Text(80)		✓

## Fields in Project Object:

Browser address bar: [sritin-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000002chyr/FieldsAndRelationships/view](https://sritin-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000002chyr/FieldsAndRelationships/view)

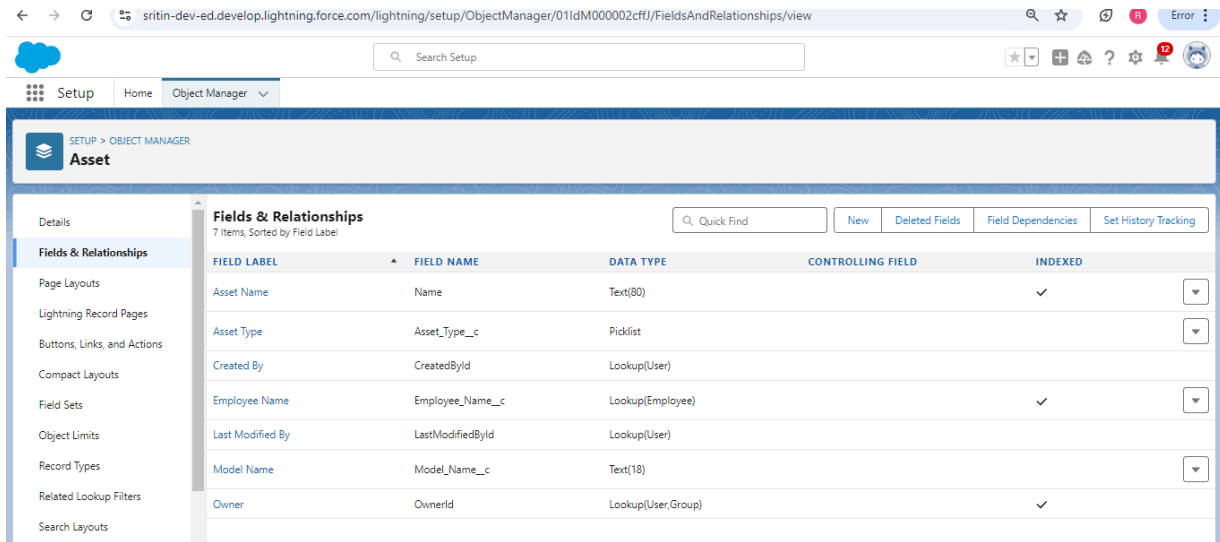
Setup > Object Manager > Project

**Fields & Relationships**  
9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Project ID	Name	Auto Number		✓
Project Lead	Project_Lead__c	Text(18)		
Project Name	Project_Name__c	Text(18)		
Project Status	Project_Status__c	Picklist		
Start Date	Start_Date__c	Date		

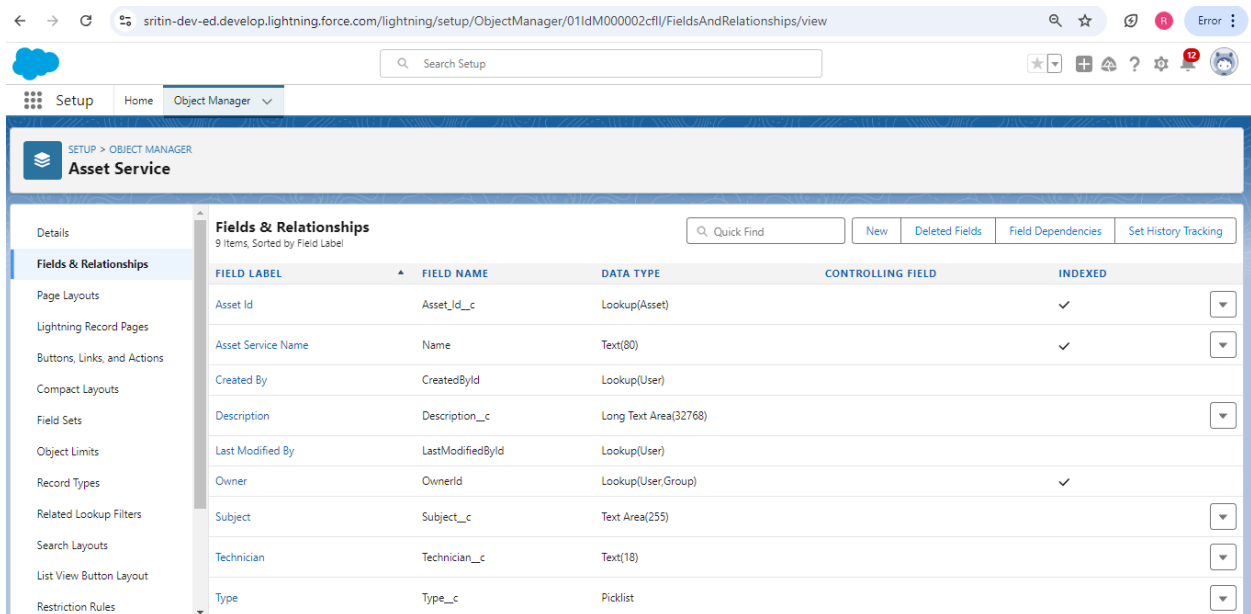
## Fields in Asset and Asset service

objects:



The screenshot shows the Salesforce Setup interface for the 'Asset' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows a table of 7 fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Asset Name (Text(80)), Asset Type (Picklist), Created By (Lookup(User)), Employee Name (Lookup(Employee)), Last Modified By (Lookup(User)), Model Name (Text(18)), and Owner (Lookup(User,Group)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Asset Name	Name	Text(80)		✓
Asset Type	Asset_Type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Employee Name	Employee_Name__c	Lookup(Employee)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Model Name	Model_Name__c	Text(18)		
Owner	OwnerId	Lookup(User,Group)		✓



The screenshot shows the Salesforce Setup interface for the 'Asset Service' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Fields & Relationships' and shows a table of 9 fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Asset Id (Lookup(Asset)), Asset Service Name (Text(80)), Created By (Lookup(User)), Description (Long Text Area(32768)), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), Subject (Text Area(255)), Technician (Text(18)), and Type (Picklist).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Asset Id	Asset_Id__c	Lookup(Asset)		✓
Asset Service Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Description	Description__c	Long Text Area(32768)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Subject	Subject__c	Text Area(255)		
Technician	Technician__c	Text(18)		
Type	Type__c	Picklist		

## Setting OWD

Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles, Role Hierarchy, Sales Teams, and Account groups, manual sharing, and so forth).

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


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

## Activity 2:

Set OWD as Private for Project and Asset Service objects.

## Outputs:

← → ↻ [srinivasaramanjani216-dev-ed-develop.lightning.force.com/lightning/setup/SecuritySharing/page?address=%2Fzfp%2Fshare%2Fzfp%3D%3D00000dM000000cCcj%26reURL%3D...](#) ☆ ⓘ



## SETUP Sharing Settings

record type mapping	Public Read Only	Private	
Waitlist	Private	Private	<input checked="" type="checkbox"/>
Web Cart Document	Private	Private	<input checked="" type="checkbox"/>
Work Order	Private	Private	<input checked="" type="checkbox"/>
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	Public Read/Write	Private	<input checked="" type="checkbox"/>
Asset Service	Private	Private	<input checked="" type="checkbox"/>
Employee	Private	Private	<input checked="" type="checkbox"/>
Project	Private	Private	<input checked="" type="checkbox"/>

### Other Settings

Standard Report Visibility ☒ ⓘ

Manual User Record Sharing ☐ ⓘ

Manager Groups ☐ ⓘ

Secure guest user record access ☒ ⓘ

Require per record name ☐ ⓘ

## **User Adoption :**

### **Activity 1: Create 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 New.
5. Fill the Details and click on Save.

### **Activity 2: 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

### **Activity 3: 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. Click on Arrow at right hand side on that Particular record.
5. Click delete.

## **Import Data**

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

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

### **Activity-1: 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.
3. Click Launch Wizard!

4. 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.

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.

7. The next screen gives you a summary of your data import. Click Start Import
8. Click OK on the popup.
9. Scroll down the page and verify that your data has been imported under batches.

## Output:

The screenshot shows the Salesforce Setup page for Bulk Data Load Jobs. The left sidebar has a search bar and a list of integrations including the Data Import Wizard. The main content area displays the details of a data load job for the Employee object. The job is completed, with 14 records processed and 0 failed. The status is 'Completed'.

Job Details		Batch Summary	
Start Time	26/09/2024, 9:10 pm IST	Queued Batches	0
End Time	26/09/2024, 9:10 pm IST	In Progress Batches	0
Time to Complete (hh:mm:ss)	00:07	Completed Batches	1
Object	Employee	Failed Batches	0
External ID Field		Progress	100%
Content Type	CSV	Records Processed	14
Concurrency Mode	Parallel	Records Failed	0
API Version	61.0	Retries	0

Batches												
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
<a href="#">View Request</a>	<a href="#">View Result</a>	751dM000004G1Dz	26/09/2024, 9:10 pm	26/09/2024, 9:10 pm	113	67	0	14	0	0	Completed	Completed

## Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

- a. Contract Manager

- b. Read Only
  - c. Marketing User
  - d. Solutions Manager
  - e. Standard User
  - f. System Administrator.
2. Custom Profiles: Custom ones defined by us. They can be deleted if there are no users assigned with that particular one.

## **Activity 1: 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.
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 objects.
4. Scroll down and Click on Save.

## **Activity 2: 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.
4. Scroll down and Click on save.

## **Activity 3: 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.

## Output of Profiles:

HR profile:

The screenshot shows the Salesforce Setup interface for the 'HR' profile. The left sidebar contains a search bar and a list of items including 'Users' and 'Profiles'. The main content area displays the 'Profile: HR' configuration page. It includes a 'Profile Detail' section with fields for Name, User License, Description, Created By, and Modified By. Below this is the 'Page Layouts' section, which lists 'Standard Object Layouts' and 'Email Application' with links to view assignments. The top of the page shows the 'Setup' tab and a search bar.

Profile Detail			
Name	HR		
User License	Salesforce	Custom Profile	✓
Description			
Created By	RESHMA PYAPILI	26/09/2024, 2:27 pm	Modified By: RESHMA PYAPILI 27/09/2024, 8:04 am

Page Layouts				
Standard Object Layouts	Global	Global Layout [View Assignment]	Location Group	Location Group Layout [View Assignment]
Email Application	Not Assigned	[View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]

Manager Profile:

The screenshot shows the Salesforce Setup interface for the 'Manager' profile. The left sidebar contains a search bar and a list of items including 'Users' and 'Profiles'. The main content area displays the 'Profile: Manager' configuration page. It includes a 'Profile Detail' section with fields for Name, User License, Description, Created By, and Modified By. Below this is the 'Page Layouts' section, which lists 'Standard Object Layouts' and 'Email Application' with links to view assignments. The top of the page shows the 'Setup' tab and a search bar.

Profile Detail			
Name	Manager		
User License	Salesforce Platform	Custom Profile	✓
Description			
Created By	RESHMA PYAPILI	26/09/2024, 2:28 pm	Modified By: RESHMA PYAPILI 26/09/2024, 3:37 pm

Page Layouts				
Standard Object Layouts	Global	Global Layout [View Assignment]	Invoice Line	Invoice Line Layout [View Assignment]
Email Application	Not Assigned	[View Assignment]	Lead	Lead Layout [View Assignment]

Onsite Employee:



← → ↻ [srit799-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM0000073fl](https://srit799-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM0000073fl) ☆ 12

Setup Home Object Manager

Q Search Setup

Q profi

Users

Profiles

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

## Profiles

Profile: On Site Employee [Help for this Page](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Access](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Provider Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definition Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

**Profile Detail** [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	On Site Employee		
User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	BESHMA PYAPILI	26/09/2024, 2:33 pm	Modified By: BESHMA PYAPILI 26/09/2024, 3:37 pm

**Page Layouts**

Standard Object Layouts			
Global	<a href="#">Global Layout</a> <a href="#">View Assignment</a>	Invoice Line	<a href="#">Invoice Line Layout</a> <a href="#">View Assignment</a>
Email Application	Not Assigned <a href="#">View Assignment</a>	Lead	<a href="#">Lead Layout</a> <a href="#">View Assignment</a>

## Remote Employee:

← → ↻ [srit799-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM0000073t3](https://srit799-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM0000073t3) ☆ 12

Setup Home Object Manager

Q Search Setup

Q profi

Users

Profiles

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

## Profiles

Profile: Remote Employee [Help for this Page](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Access](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Provider Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definition Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

**Profile Detail** [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Remote Employee		
User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	BESHMA PYAPILI	26/09/2024, 2:37 pm	Modified By: BESHMA PYAPILI 26/09/2024, 3:37 pm

**Page Layouts**

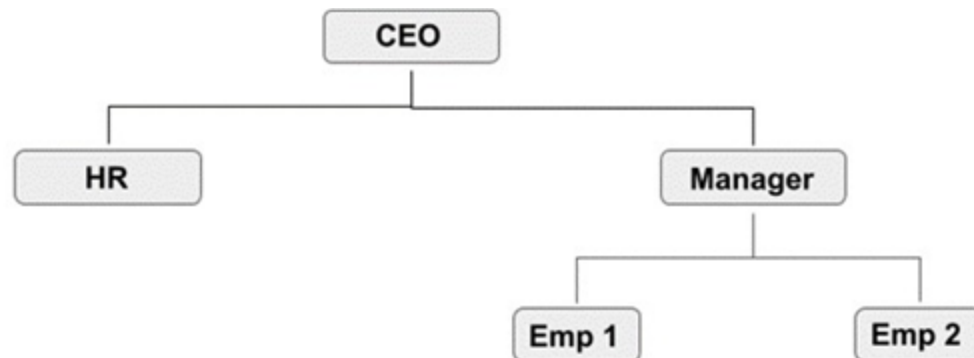
Standard Object Layouts			
Global	<a href="#">Global Layout</a> <a href="#">View Assignment</a>	Invoice Line	<a href="#">Invoice Line Layout</a> <a href="#">View Assignment</a>
Email Application	Not Assigned <a href="#">View Assignment</a>	Lead	<a href="#">Lead Layout</a> <a href="#">View Assignment</a>

# Roles

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

## Activity 1: Creating HR Role

1. Go to quick find -> Search for Roles -> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as "HR" and Role name gets auto populated. Check to whom this role (HR) reports. Then click on Save.
4. Refer the below diagram to understand which role reports to which role.



**Role Hierarchy:** The above diagram represents which role reports to which one.

## Activity 2: Creating more roles

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

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

# Outputs:

## Creating HR role:

The screenshot shows the Salesforce Setup Roles page for the 'HR' role. The left sidebar contains a search bar with 'roles' and a navigation menu with 'Users', 'Roles', 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area displays the 'Role Detail' for 'HR', including its hierarchy, modified by, and access permissions. Below this, the 'Users in HR Role' table lists one user: Niklaus Mikaelson.

Action	Full Name	Alias	Username	Active
<a href="#">Edit</a>	Niklaus Mikaelson	nmika	niklaus@hr.com	✓

## Creating Manager role

The screenshot shows the Salesforce Setup Roles page for the 'Manager' role. The left sidebar contains a search bar with 'roles' and a navigation menu with 'Users', 'Roles', 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area displays the 'Role Detail' for 'Manager', including its hierarchy, modified by, and access permissions. Below this, the 'Users in Manager Role' table lists one user: Kol Mikaelson.

Action	Full Name	Alias	Username	Active
<a href="#">Edit</a>	Kol Mikaelson	kmika	kol@sales.com	✓

## Creating On Site Employee role:

The screenshot shows the Salesforce Setup interface for the 'On Site Employee' role. The left sidebar contains a navigation menu with 'Roles' selected under 'Users'. The main content area displays the role details and a table of users assigned to the role.

**Role: On Site Employee**

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: SRIT > CEO > **Manager** > On Site Employee  
Siblings: [Remote Employee](#)

[Users in On Site Employee Role \(1\)](#)

**Role Detail**

Label	On Site Employee	Role Name	On_Site_Employee
This role reports to	<b>Manager</b>	Role Name as displayed on reports	
Modified By	RESHMA PYAPILI 26/09/2024, 2:42 pm	Sharing Groups	<a href="#">Role, Role and Internal Subordinates</a>
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

**Users in On Site Employee Role**

Action	Full Name	Alias	Username	Active
<a href="#">Edit</a>	Harry Potter	hpote	harry@sales.user	✓

## Creating Remote Employee role

The screenshot shows the Salesforce Setup interface for the 'Remote Employee' role. The left sidebar contains a navigation menu with 'Roles' selected under 'Users'. The main content area displays the role details and a table of users assigned to the role.

**Role: Remote Employee**

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: SRIT > CEO > **Manager** > Remote Employee  
Siblings: [On Site Employee](#)

[Users in Remote Employee Role \(1\)](#)

**Role Detail**

Label	Remote Employee	Role Name	Remote_Employee
This role reports to	<b>Manager</b>	Role Name as displayed on reports	
Modified By	RESHMA PYAPILI 26/09/2024, 2:42 pm	Sharing Groups	<a href="#">Role, Role and Internal Subordinates</a>
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

**Users in Remote Employee Role**

Action	Full Name	Alias	Username	Active
<a href="#">Edit</a>	John Nicolas	jnlco	john@sales.emg	✓

# Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

## Activity 1: Create User

1. Go to setup -> type users in quickfind box -> select users-> click New user.
2. Fill in the fields Save.

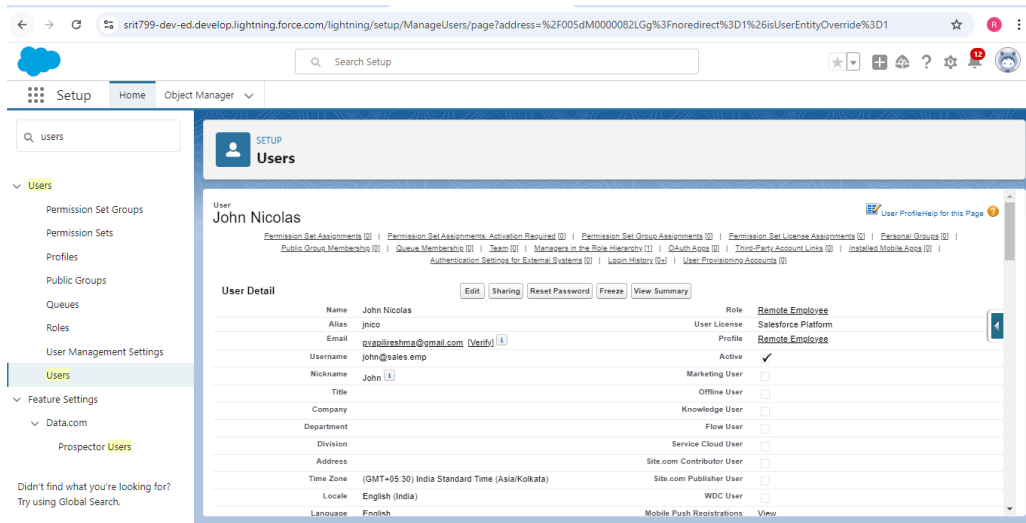
## Activity 2: Creating another user

1. Go to setup -> type users in quickfind box -> select users-> click New user.
2. Fill in the fields
3. Save.

## Activity 3: Creating more users

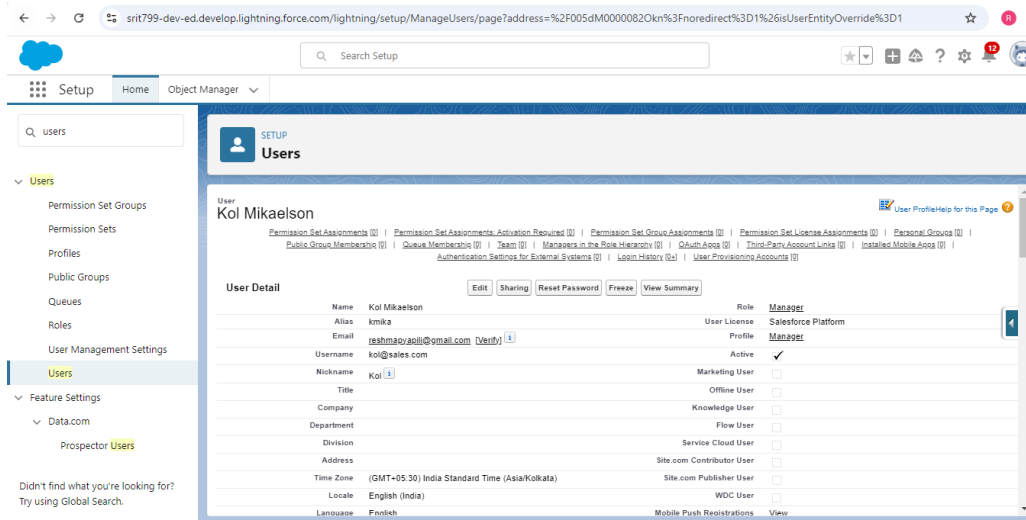
Create two more users as we created in activity 2.

# Output users:



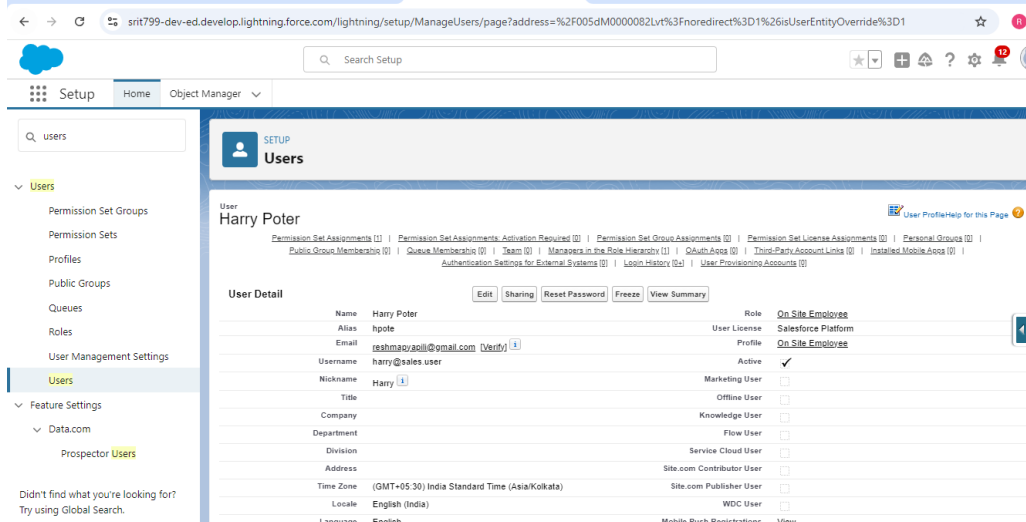
This screenshot shows the Salesforce Setup page for user John Nicolas. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the user's profile information, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, and Language. The user's role is Remote Employee, and their license is Salesforce Platform. The user is active and has a profile of Remote Employee. The user's permissions are listed as Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Mobile Push Registrations.

Field	Value	Field	Value
Name	John Nicolas	Role	Remote Employee
Alias	jnico	User License	Salesforce Platform
Email	evanilreshma@gmail.com	Profile	Remote Employee
Username	john@sales.emp	Active	✓
Nickname	John	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View



This screenshot shows the Salesforce Setup page for user Kol Mikaelson. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the user's profile information, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, and Language. The user's role is Manager, and their license is Salesforce Platform. The user is active and has a profile of Manager. The user's permissions are listed as Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Mobile Push Registrations.

Field	Value	Field	Value
Name	Kol Mikaelson	Role	Manager
Alias	kmika	User License	Salesforce Platform
Email	reshmaevanil@gmail.com	Profile	Manager
Username	kol@sales.com	Active	✓
Nickname	Kol	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View



This screenshot shows the Salesforce Setup page for user Harry Potter. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the user's profile information, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, and Language. The user's role is On Site Employee, and their license is Salesforce Platform. The user is active and has a profile of On Site Employee. The user's permissions are listed as Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Mobile Push Registrations.

Field	Value	Field	Value
Name	Harry Potter	Role	On Site Employee
Alias	hpote	User License	Salesforce Platform
Email	reshmaevanil@gmail.com	Profile	On Site Employee
Username	harry@sales.user	Active	✓
Nickname	Harry	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View

# Page layouts

Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

## Activity 1 : 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.
2. Click on Pagelayout -> Click on New.
3. Give Page layout Name as "On Site Employee Layout" and click on Save.
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.
7. Click Save.
8. Make sure your page layout looks like the picture above.

## Output:

The screenshot displays the Salesforce Page Layout editor for the Employee object. The layout is named "On Site Employee Layout". The layout includes the following sections and fields:

- Personal Information**
  - Date of Birth
  - Address
  - Age
- Allowances**
  - Cab Allowance Amount
  - Food Allowance Amount
- System Information** (Header visible on edit only)
  - Created By
  - Last Modified By

The left sidebar shows the "Page Layouts" section selected. The top navigation bar includes "Setup", "Home", and "Object Manager".

## Activity 2 : Creating another page layout

Create another page layout and name it as “RemoteEmployee Layout”, and in the allowances section use only Wifi Allowance and Wifi Allowances Amount fields.

### Output:

The screenshot displays the Salesforce Lightning Setup interface for the 'Employee' object. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'SETUP > OBJECT MANAGER Employee'. It includes a 'Quick Find' bar and a 'Fields' table. The 'Fields' table has columns: Section, Field Name, Email, Food Allowance Am..., Last Modified By, Mode of Work, and Record Type. The fields listed are: Cab Allowance, Cab Allowance Amount, Employee ID, Food Allowances, LinkedIn Profile, Owner, Reports to, Address, Created By, Employee Name, Gender, Login Time, Phone no, Wifi Allowance Am..., Age, Date of Birth, Experience, Joiningdate, Logout Time, and Wifi Allowances. Below the fields table, there are sections for 'Personal Information' (Logout Time: Sample Text, LinkedIn Profile: www.salesforce.com, Food Allowance Amount: ₹123.45), 'Allowances' (Wifi Allowances: checked, Wifi Allowance Amount: ₹123.45), and 'System Information' (Created By: Sample Text, Last Modified By: Sample Text).



# Chatter Group

Salesforce Chatter Groups are collaborative spaces within the Salesforce platform that enable teams to communicate, share information, and collaborate on projects. They provide a centralized hub for discussions, file sharing, and updates, allowing users to stay connected, streamline workflows, and enhance productivity.

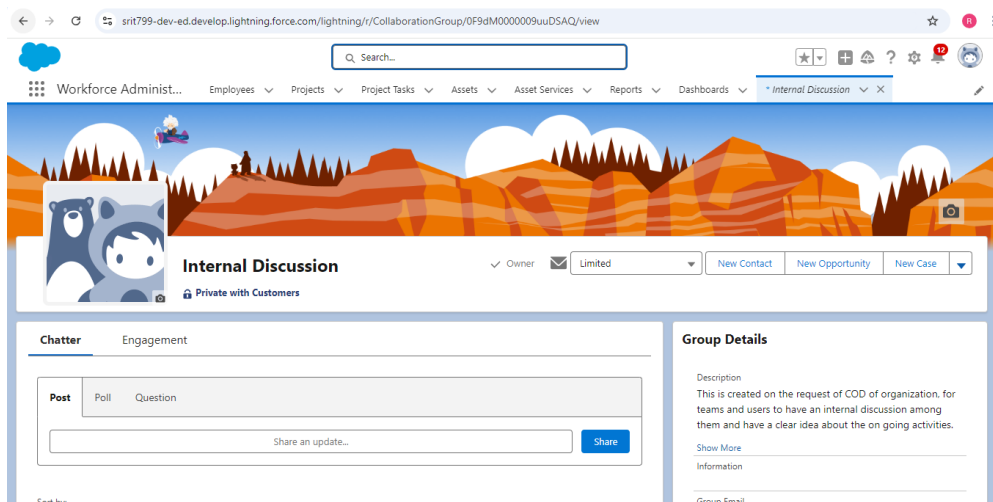
## Activity 1 : Creating a chatter group for your organization.

To Create a chatter group:

1. Click the App Launcher.
2. Enter Groups in the Search apps and items...box and select Groups.
3. Click New.
4. Fill in the new group information with these details:
5. Click Save & Next. Skip the Upload Picture section and click Next.
6. On the Manage Members screen, click Add next to users you created in the previous activity.
7. Click Done.
8. This is how your group interface looks like.
9. Where it says Share an update, post this message to the group:  
Welcome to the InternalDiscussion Group, here you can post anything which is related to ongoing projects.

Click Save.

## Output:



## Record Types

Record Types are a way of grouping many records of one type for that object. These can be applied to any standard or custom object, and allow you to have a different page layout, fields, required fields, and picklist values. Record types allow administrators to create a different page layout with custom picklist fields and values for the same business process and various business processes.

### Activity 1: Creating On Site Employee Record Type

To create a Record Type:

1. Go to Setup -> click on Object Manager -> Search for the object (Employee) -> from drop down click Edit.
2. From the left panel click Record Types -> New.
3. Give Record Type Label as "On Site Employee" and make it active.
4. Uncheck for "Make Available".
5. Scroll down and check for the Manager & System Administrator profile and click on Next.
6. 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.

### Activity 2: Creating "Remote Employee" Record Type

Create another Record Type with name "RemoteEmployee" following the step from activity 1.

Note: use Remote Employee page layout for Remote Employee record type.

## Permission sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

### Activity 1: Creating a permission set

To Create a Permission Set:

1. Go to setup -> type "permission sets" in quick search -> select permission sets -> New.
2. Enter the label name as "Per to Emp" -> Save.
3. Under Apps Select object settings.
4. Click on Employee object -> click on Edit -> under object permission check for read and create.
5. Click on Save.
6. After saving the permission click on the Manage assignment
7. 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 and Done

# Output:

The screenshot shows the Salesforce Lightning Setup interface. The browser address bar displays the URL: `srit799-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PSdM000007WfGv`. The left sidebar contains navigation links: Setup, Home, and Object Manager. A search bar in the sidebar shows the text "permiss". Below the sidebar, a message states: "Didn't find what you're looking for? Try using Global Search."

The main content area is titled "Permission Sets" and displays the details for the "Per to Emp" Permission Set. The page includes a "Find Settings..." search bar and buttons for "Clone", "Edit Properties", "Manage Assignments", and "View Summary".

**Permission Set Overview**

Description	API Name	Per_to_Emp
License	Namespace Prefix	
Session Activation Required <input type="checkbox"/>	Created By	RESHMA PYAPILI 26/09/2024, 3:38 pm
Permission Set Groups Added To 0	Last Modified By	RESHMA PYAPILI 26/09/2024, 3:40 pm

**Apps**

- 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"

# REPORTS

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

## Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

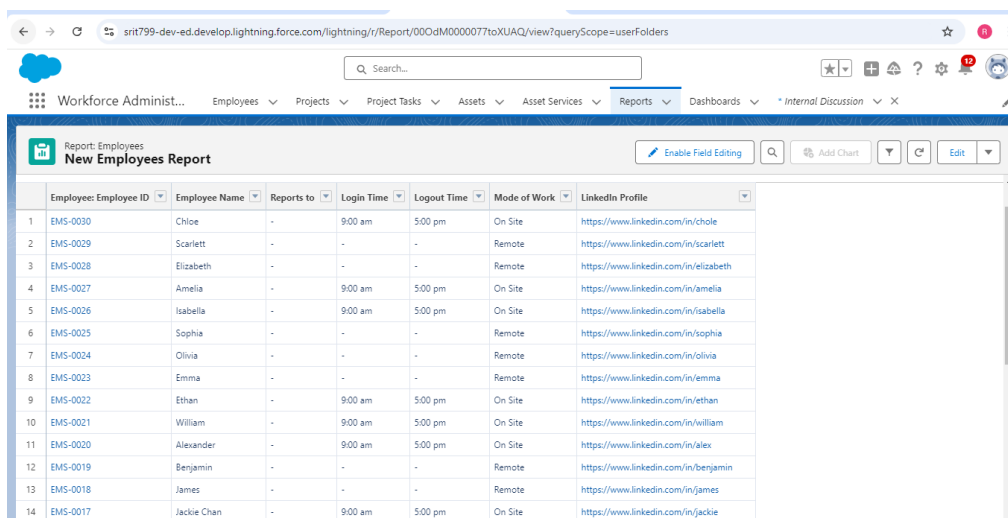
## Activity 1: Create Report

To Create a Report:

1. Go to the app - → click on the report stab
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

Save or run it.

Output:



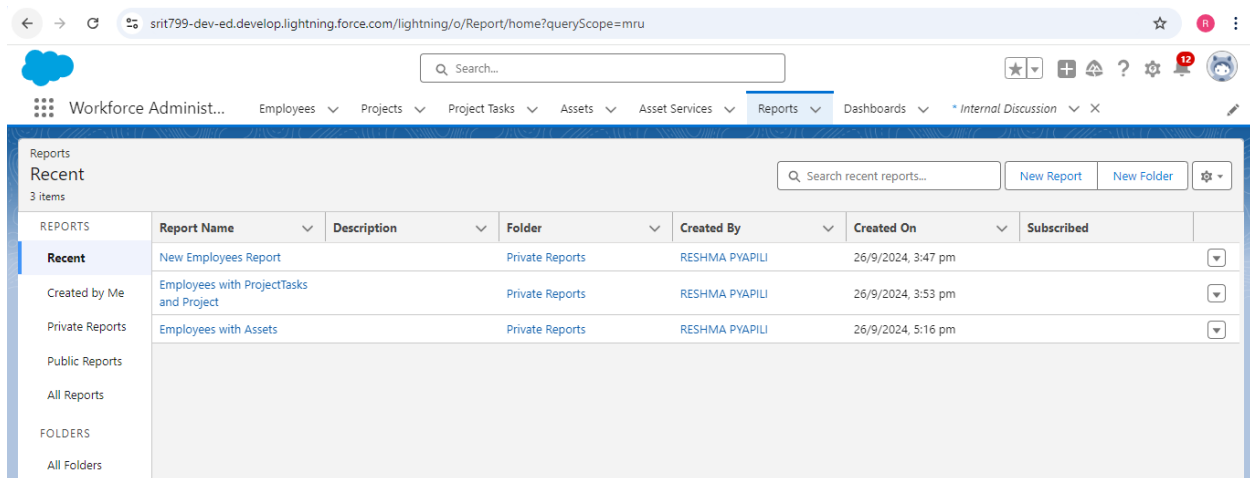
The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with 'Workforce Administ...' and various tabs like 'Employees', 'Projects', 'Project Tasks', 'Assets', 'Asset Services', 'Reports', 'Dashboards', and 'Internal Discussion'. Below this, the 'New Employees Report' is displayed. The report has a table with columns: 'Employee: Employee ID', 'Employee Name', 'Reports to', 'Login Time', 'Logout Time', 'Mode of Work', and 'LinkedIn Profile'. The table contains 14 rows of employee data.

Employee: Employee ID	Employee Name	Reports to	Login Time	Logout Time	Mode of Work	LinkedIn Profile
EMS-0030	Chloe	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/chole">https://www.linkedin.com/in/chole</a>
EMS-0029	Scarlett	-	-	-	Remote	<a href="https://www.linkedin.com/in/scarlett">https://www.linkedin.com/in/scarlett</a>
EMS-0028	Elizabeth	-	-	-	Remote	<a href="https://www.linkedin.com/in/elizabeth">https://www.linkedin.com/in/elizabeth</a>
EMS-0027	Amelia	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/amelia">https://www.linkedin.com/in/amelia</a>
EMS-0026	Isabella	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/isabella">https://www.linkedin.com/in/isabella</a>
EMS-0025	Sophia	-	-	-	Remote	<a href="https://www.linkedin.com/in/sophia">https://www.linkedin.com/in/sophia</a>
EMS-0024	Olivia	-	-	-	Remote	<a href="https://www.linkedin.com/in/olivia">https://www.linkedin.com/in/olivia</a>
EMS-0023	Emma	-	-	-	Remote	<a href="https://www.linkedin.com/in/emma">https://www.linkedin.com/in/emma</a>
EMS-0022	Ethan	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/ethan">https://www.linkedin.com/in/ethan</a>
EMS-0021	William	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/william">https://www.linkedin.com/in/william</a>
EMS-0020	Alexander	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/alex">https://www.linkedin.com/in/alex</a>
EMS-0019	Benjamin	-	-	-	Remote	<a href="https://www.linkedin.com/in/benjamin">https://www.linkedin.com/in/benjamin</a>
EMS-0018	James	-	-	-	Remote	<a href="https://www.linkedin.com/in/james">https://www.linkedin.com/in/james</a>
EMS-0017	Jackie Chan	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/jackie">https://www.linkedin.com/in/jackie</a>

## Activity 2: Create 2 more Reports

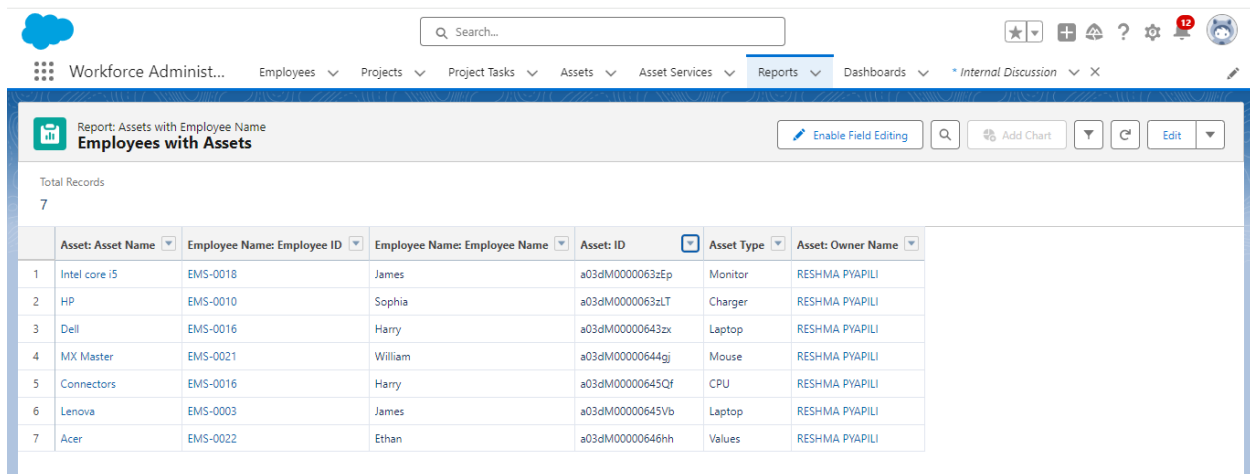
1. Create a report with report type: “Employees with Project Tasks and Projects”.
2. Create a report with report type: “Employees with Assets”. Created report “Employees with Project Tasks Employees Projects”

Output:



The screenshot shows the Salesforce Reports page. The breadcrumb trail is: Workforce Administ... > Employees > Projects > Project Tasks > Assets > Asset Services > Reports. The left sidebar shows 'Recent' reports (3 items) and 'FOLDERS' (All Folders). The main table lists recent reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Employees Report		Private Reports	RESHMA PYAPILI	26/9/2024, 3:47 pm	
Created by Me	Employees with ProjectTasks and Project		Private Reports	RESHMA PYAPILI	26/9/2024, 3:53 pm	
Private Reports	Employees with Assets		Private Reports	RESHMA PYAPILI	26/9/2024, 5:16 pm	
Public Reports						
All Reports						



The screenshot shows the Salesforce Report 'Employees with Assets'. The breadcrumb trail is: Workforce Administ... > Employees > Projects > Project Tasks > Assets > Asset Services > Reports. The report title is 'Report: Assets with Employee Name Employees with Assets'. The table shows 7 total records:

	Asset: Asset Name	Employee Name: Employee ID	Employee Name: Employee Name	Asset: ID	Asset Type	Asset: Owner Name
1	Intel core i5	EMS-0018	James	a03dM0000063zEp	Monitor	RESHMA PYAPILI
2	HP	EMS-0010	Sophia	a03dM0000063zLT	Charger	RESHMA PYAPILI
3	Dell	EMS-0016	Harry	a03dM00000643zx	Laptop	RESHMA PYAPILI
4	MX Master	EMS-0021	William	a03dM00000644gj	Mouse	RESHMA PYAPILI
5	Connectors	EMS-0016	Harry	a03dM00000645Qf	CPU	RESHMA PYAPILI
6	Lenova	EMS-0003	James	a03dM00000645Vb	Laptop	RESHMA PYAPILI
7	Acer	EMS-0022	Ethan	a03dM00000646hh	Values	RESHMA PYAPILI

# Dashboards

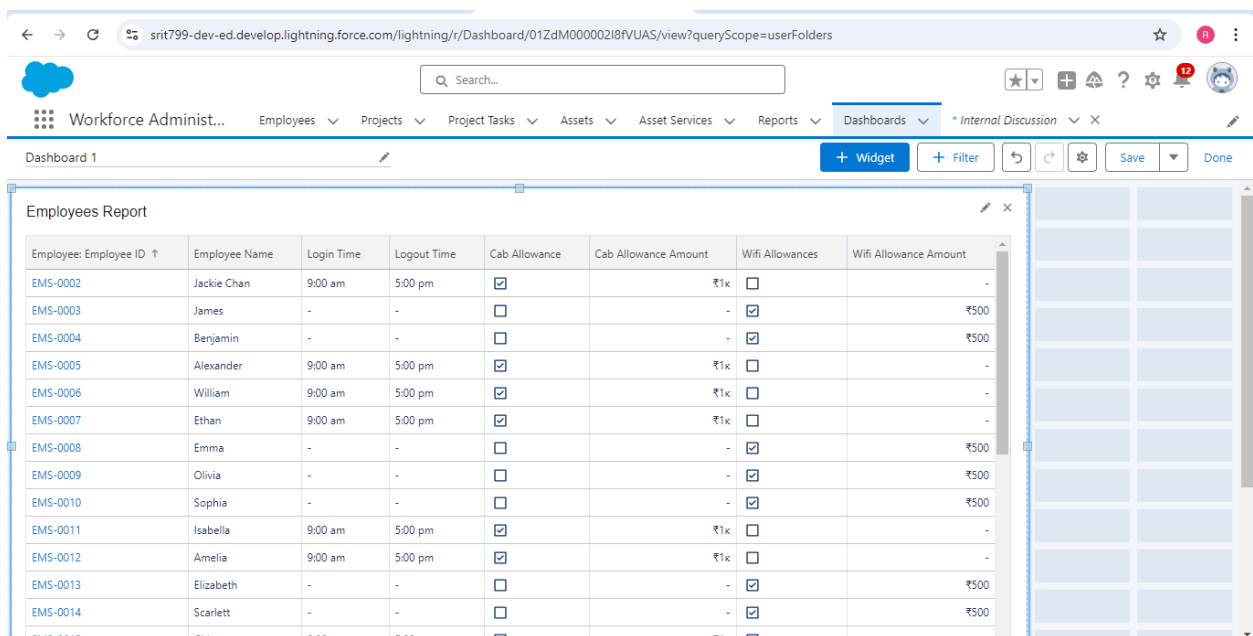
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

## Activity 1: Create Dashboard

To Create a Dashboard

1. Go to the app - → click on the Dashboards tabs.
2. Give a Name and click on Create.
3. Select add component.
4. Select a Report and click on select.
5. Click Add then click on Save and then click on Done.

## Output:



The screenshot shows a Salesforce dashboard interface. At the top, there's a navigation bar with tabs for Workforce Administration, Employees, Projects, Project Tasks, Assets, Asset Services, Reports, and Dashboards. The 'Dashboards' tab is selected, showing a sub-tab for 'Internal Discussion'. Below the navigation bar, there's a search bar and a 'Dashboard 1' label. The main content area displays an 'Employees Report' table with columns for Employee ID, Employee Name, Login Time, Logout Time, Cab Allowance, Cab Allowance Amount, Wifi Allowances, and Wifi Allowance Amount. The table lists 15 employees with their respective IDs, names, and allowance details.

Employee: Employee ID ↑	Employee Name	Login Time	Logout Time	Cab Allowance	Cab Allowance Amount	Wifi Allowances	Wifi Allowance Amount
EMS-0002	Jackie Chan	9:00 am	5:00 pm	<input checked="" type="checkbox"/>	₹1k	<input type="checkbox"/>	-
EMS-0003	James	-	-	<input type="checkbox"/>	-	<input checked="" type="checkbox"/>	₹500
EMS-0004	Benjamin	-	-	<input type="checkbox"/>	-	<input checked="" type="checkbox"/>	₹500
EMS-0005	Alexander	9:00 am	5:00 pm	<input checked="" type="checkbox"/>	₹1k	<input type="checkbox"/>	-
EMS-0006	William	9:00 am	5:00 pm	<input checked="" type="checkbox"/>	₹1k	<input type="checkbox"/>	-
EMS-0007	Ethan	9:00 am	5:00 pm	<input checked="" type="checkbox"/>	₹1k	<input type="checkbox"/>	-
EMS-0008	Emma	-	-	<input type="checkbox"/>	-	<input checked="" type="checkbox"/>	₹500
EMS-0009	Olivia	-	-	<input type="checkbox"/>	-	<input checked="" type="checkbox"/>	₹500
EMS-0010	Sophia	-	-	<input type="checkbox"/>	-	<input checked="" type="checkbox"/>	₹500
EMS-0011	Isabella	9:00 am	5:00 pm	<input checked="" type="checkbox"/>	₹1k	<input type="checkbox"/>	-
EMS-0012	Amelia	9:00 am	5:00 pm	<input checked="" type="checkbox"/>	₹1k	<input type="checkbox"/>	-
EMS-0013	Elizabeth	-	-	<input type="checkbox"/>	-	<input checked="" type="checkbox"/>	₹500
EMS-0014	Scarlett	-	-	<input type="checkbox"/>	-	<input checked="" type="checkbox"/>	₹500
EMS-0015	China	9:00 am	5:00 pm	<input checked="" type="checkbox"/>	₹1k	<input type="checkbox"/>	-

## Activity 2:

Create another Dashboard as we discussed in activity 1.

Output :

The screenshot shows a Salesforce Lightning interface. The browser address bar displays the URL: `srlt799-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZdM000002IBS5UAO/view?queryScope=userFolders`. The Salesforce navigation bar includes the 'Workforce Administ...' logo and a search bar. The main navigation menu contains: Employees, Projects, Project Tasks, Assets, Asset Services, Reports, Dashboards, and Internal Discussion. The 'Dashboards' menu is expanded, showing 'Internal Discussion' and a close icon. The dashboard header for 'Dashboard 2' includes the text 'As of 26-Sept-2024, 5:56 pm Viewing as RESHMA PYAPILI' and buttons for 'Refresh', 'Edit', and 'Subscribe'. The main content area displays a table titled 'Employees with Assets' with the following data:

Asset: Asset Name ↑	Employee Name: Employee ID	Employee Name: Employee Name	Asset: ID	Date Of Issue
Acer	EMS-0022	Ethan	a03dM00000646hh	27/02/2021
Connectors	EMS-0016	Harry	a03dM00000645Qf	-
Dell	EMS-0016	Harry	a03dM00000643zx	-
HP	EMS-0010	Sophia	a03dM0000063zLT	19/03/2021
Intel core i5	EMS-0018	James	a03dM0000063zEp	12/05/2017
Lenova	EMS-0003	James	a03dM00000645Vb	12/05/2017
MX Master	EMS-0021	William	a03dM00000644gj	20/05/2021

Below the table is a link: [View Report \(Employees with Assets\)](#).



# Challenges & Solutions

## Data Integration Challenges

- Challenge: Integrating existing employee data from various sources can lead to inconsistencies and errors.
- Solution: Implement a robust data mapping and validation process. Use ETL (Extract, Transform, Load) tools to ensure data accuracy and consistency before importing it into the Salesforce platform.

## User Adoption

- Challenge: Employees may resist using a new system, leading to low adoption rates.
- Solution: Provide comprehensive training sessions and user-friendly documentation. Engage key stakeholders early in the project to promote ownership and encourage adoption through pilot programs.

## Customization Complexity

- Challenge: Customizing the user interface to meet diverse user needs can become complicated.
- Solution: Gather requirements through user interviews and feedback sessions. Prioritize features based on user needs and gradually roll out customizations in phases.

## Performance Tracking Difficulties

- Challenge: Tracking employee performance across multiple projects can be complex.
- Solution: Develop clear metrics and KPIs for performance assessment. Utilize Salesforce's reporting tools to create dashboards that visualize performance data in real time.

## Security and Data Privacy

- Challenge: Protecting sensitive employee information while ensuring appropriate access levels.
- Solution: Implement role-based access controls and conduct regular security audits. Utilize Salesforce's built-in security features to manage data visibility and compliance.

# **Future Recommendations**

## **Continuous Improvement**

- Regularly collect user feedback to refine and enhance the application. Implement agile methodologies to adapt to changing user needs and organizational goals.

## **Integration with Other Tools**

- Explore integrating the Workforce Administration Solution with other HR and project management tools to create a more seamless workflow and enhance functionality.

## **Mobile Access**

- Consider developing a mobile-friendly version of the application to provide employees with greater flexibility and access while on the go.

## **Advanced Analytics**

- Leverage AI and machine learning capabilities within Salesforce to provide predictive analytics for workforce planning and performance forecasting.

## **Community Building**

- Create a user community or forum where employees can share best practices, tips, and provide support to each other, fostering a culture of collaboration and continuous learning.

## **Conclusion**

The Workforce Administration Solution aims to transform how organizations manage employee data, project assignments, and asset tracking. By addressing key challenges through strategic solutions and fostering user adoption, the platform can significantly enhance operational efficiency. Future recommendations, such as continuous improvement, integration with other tools, and leveraging advanced analytics, will ensure the solution remains relevant and effective. Ultimately, the successful implementation of this application will lead to a more engaged workforce, improved performance tracking, and a streamlined asset management process, positioning the organization for future growth and success.