

PROJECT: Workforce Administration Solution

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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.

What you'll learn:

1. Real Time Salesforce Project
2. Data Modelling
3. Creating an Application
4. User Interface Customization
5. Importing bulk amounts of data
6. Security in Salesforce
7. Group Collaboration
8. Reports & Dashboards



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Intro to Salesforce:

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

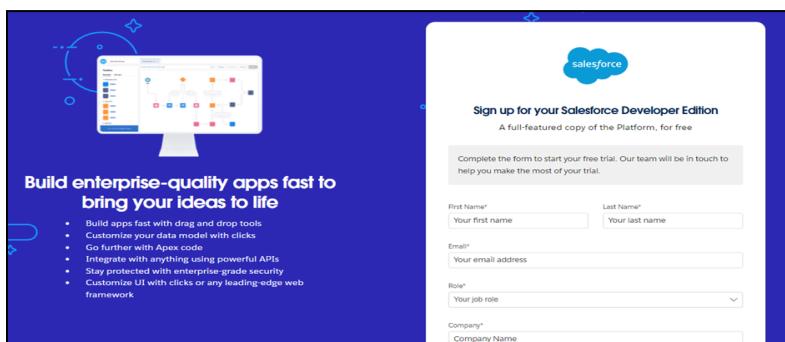
So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3lGde5k>

Activity 1: Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :



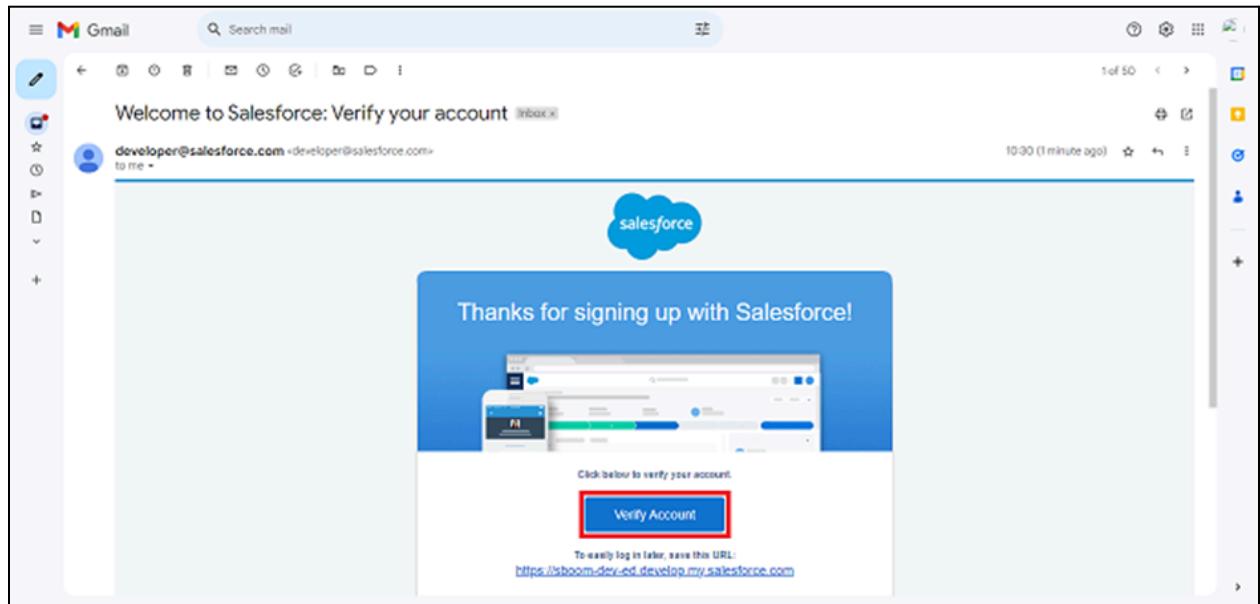
- 1) First name & Last name
- 2) Email
- 3) Role : Developer
- 4) Company : College Name
- 5) County : India
- 6) Postal Code : pin code
- 7) Username : should be a combination of your name and company
- 8) Click on Sign me up.

This need not be an actual email id, you can give anything in the format :
username@organization.com

Click on sign me up after filling these.

Activity 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account

3. Give a password and answer a security question and click on change password.

Change Your Password

Enter a new password for lead@sb.oom.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
▼ In what city were you born?

* Answer
asdfghijkl

Change Password

4. Then you will redirect to your salesforce setup page.

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

SETUP Home

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Objects: What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects?

Salesforce objects are of two types:

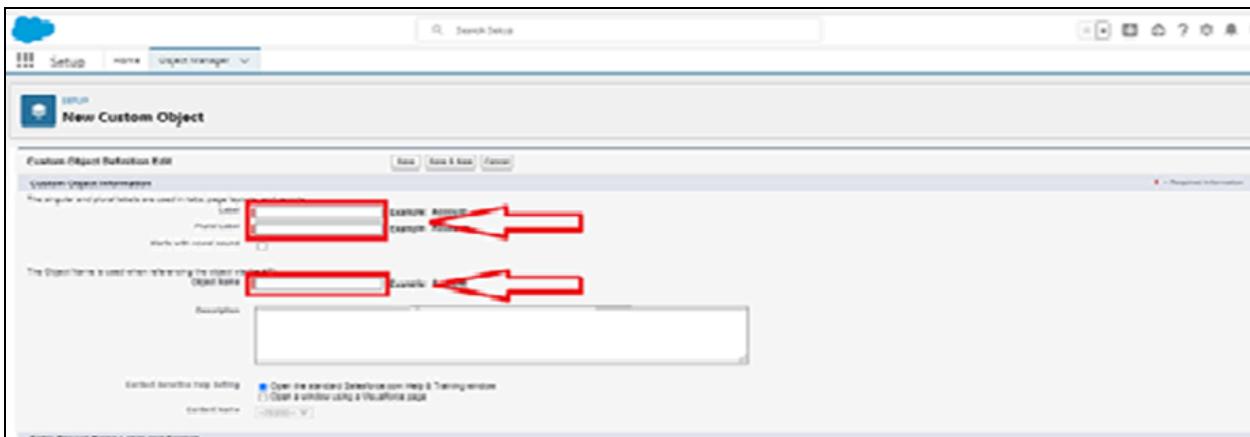
1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.
The purpose of creating an Employee custom object is to keep track the employee's activities and their individual and as well as team progress.

Activity 1-To create an object:

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



- 1) Enter the label name: Employee
- 2) Plural label name: Employees



3) 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

Enter Record Name Label and Format

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

Record Name	<input type="text" value="Employee Id"/>	Example: Account Name
Data Type	<input type="text" value="Auto Number"/>	
Display Format	<input type="text" value="EMS-{0000}"/>	Example: A-{0000} What Is This?
Starting Number	<input type="text" value="1"/>	

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

Optional Features

Allow Activities **Allow Reports** Track Field History Allow in Chatter Groups Enable Licensing [Learn more](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing Allow Bulk API Access Allow Streaming API Access

Deployment Status

In Development Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search **Save** **Save & New** **Cancel**

Activity 2: 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 --> Click on
Custom Object.
 - 1) Enter the label name--> Project
 - 2) Plural label name--> Projects
 - 3) Enter Record Name Label and Format
 - 1 Record Name : Project ID
 - 2 Data Type : Auto Number
 - 3 Display Format : Proj-{0000}
 - 4 Starting Number : 1
2. Click on Allow reports,
3. Allow search --> Save

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

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

Tabs:

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

Types of Tabs:

1. Custom Tabs

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2. Web Tabs

Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

3. Visualforce Tabs

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

4. Lightning Component Tabs

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

5. Lightning Page Tabs

Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

Activity 1: 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)

The screenshot shows the 'Custom Tabs' section of the Salesforce Setup. It includes a heading 'Custom Tabs' and a sub-section 'Custom Object Tabs'. A red box highlights the 'New' button. Below it, a message says 'No Custom Object Tabs have been defined'. The 'Web Tabs' section follows, also with a 'New' button highlighted by a red box, and a message stating 'No Web Tabs have been defined'.

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.

This screenshot shows the configuration screen for creating a new custom tab. At the top, it asks to choose a custom object, with a link to 'create a new custom object now'. The 'Object' dropdown is set to '--None--', and a dropdown menu is open, showing options like 'Asset', 'Asset Service', and 'Employee'. The 'Employee' option is highlighted with a red box. Below the dropdown, there's a note about choosing a home page custom link. Further down, there's a field for entering a short description and a 'Description' text area. At the bottom right, there are 'Next' and 'Cancel' buttons, with the 'Next' button also highlighted by a red box.

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.

Activity 3: Creating tabs for remaining objects

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

Custom Object Tabs		New	What Is This?
Action	Label	Tab Style	
Edit Del	<u>Assets</u>		Camera
Edit Del	<u>Asset Services</u>		CD/DVD
Edit Del	<u>Employees</u>		Balls
Edit Del	<u>Energy Audits</u>		Sun
Edit Del	<u>Favorites</u>		Bell
Edit Del	<u>New Features</u>		Trophy
Edit Del	<u>Projects</u>		Boat
Edit Del	<u>ProjectTasks</u>		Bridge

The Lightning App:

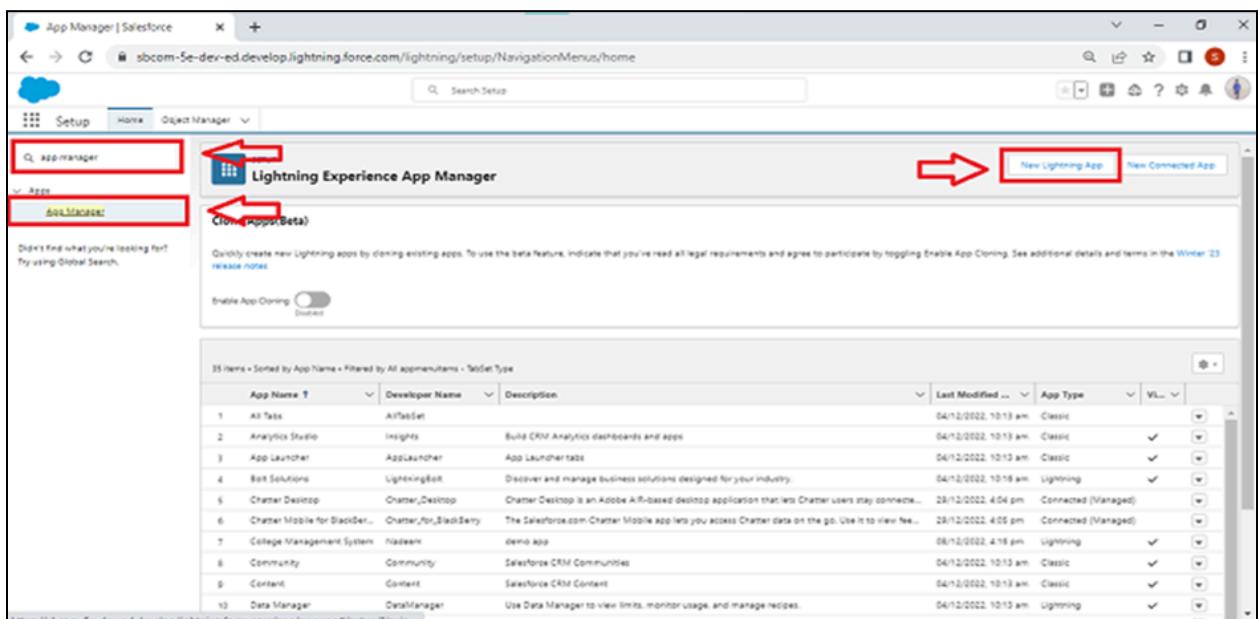
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Activity 1: 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.



2. Fill the app name in app details and branding as follow

App Name : Workforce Administrator Solution

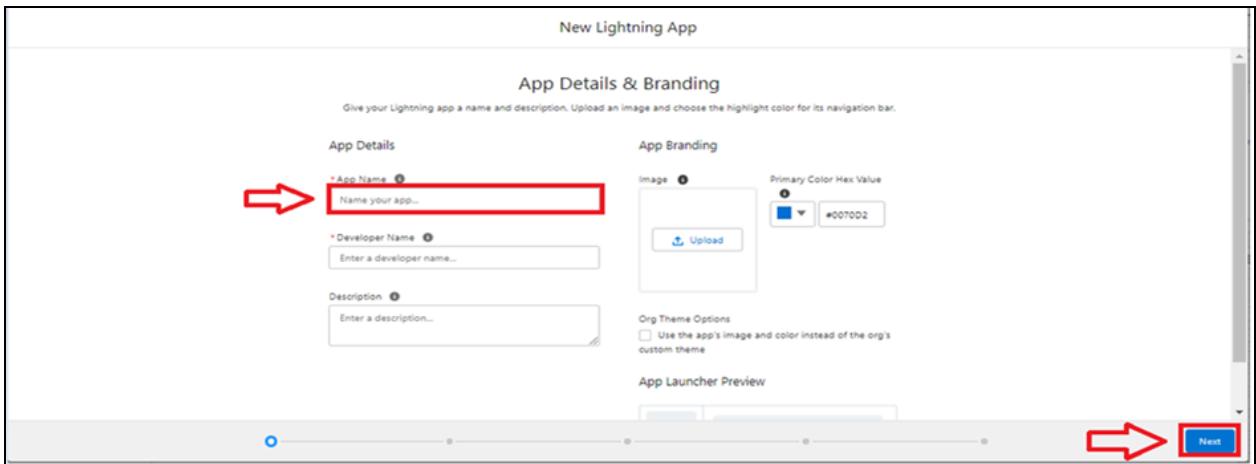
Developer Name : this will auto populated

Description : Give a meaningful description

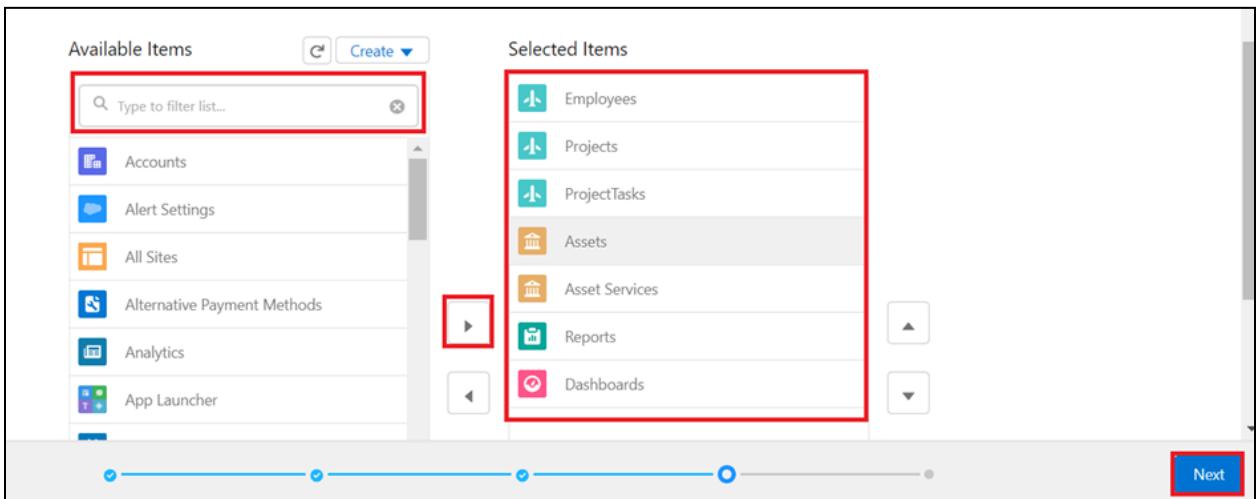
Image : optional (if you want to give any image you can otherwise not mandatory)

Primary color hex value : keep this default

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



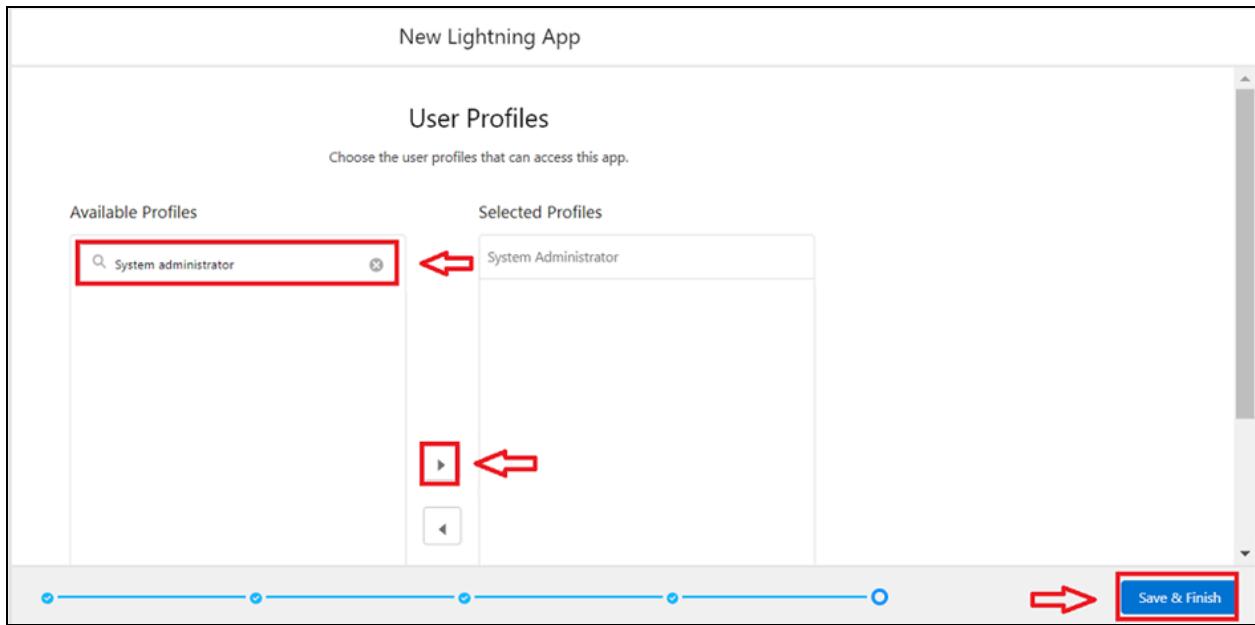
4. To Add Navigation Items:



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

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

5. To Add User Profiles:



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

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

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

1. Created By
2. Owner
3. Last Modified
4. Field Made During object Creation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

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.

The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with 'Setup' and 'Object Manager'. A red box highlights 'Object Manager' with a red arrow pointing to it. Below the navigation bar, the title 'Object Manager' is displayed with a blue icon. A search bar contains the text 'Employee' with a red box around it and a red arrow pointing to it. The main area shows a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. One row is selected, showing 'Employee' in the LABEL column and 'Employee_c' in the API NAME column, both highlighted with red boxes and arrows. The 'Custom Object' type is listed under TYPE. The 'Last Modified' date is 20/06/2023, and the 'Deployed' status is checked.

2. Now click on “Fields & Relationships” --> New

The screenshot shows the 'Fields & Relationships' section of the Employee object's details. On the left, there is a sidebar with options like 'Details', 'Fields & Relationships' (highlighted with a red box and arrow), 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', and 'Compact Layouts'. The main area has a title 'Fields & Relationships' with a subtitle '4 Items, Sorted by Field Label'. It includes a 'Quick Find' search bar and a 'New' button highlighted with a red box and arrow. The table lists four fields: 'Created By' (Field Label: Created By, Field Name: CreatedById, Data Type: Lookup(User)), 'Employee ID' (Field Label: Employee ID, Field Name: Name, Data Type: Auto Number, indexed: checked), 'Last Modified By' (Field Label: Last Modified By, Field Name: LastModifiedById, Data Type: Lookup(User)), and 'Owner' (Field Label: Owner, Field Name: OwnerId, Data Type: Lookup(User,Group), indexed: checked).

3. Select Data type as “Text”.

The screenshot shows the 'Data Type' selection screen. It lists several options: 'Picklist' (description: Allows users to select a value from a list you define), 'Picklist (Multi-Select)' (description: Allows users to select multiple values from a list you define), 'Text' (selected and highlighted with a red box and arrow, description: Allows users to enter any combination of letters and numbers), 'Text Area' (description: Allows users to enter up to 255 characters on separate lines), and 'Text Area (Long)' (description: Allows users to enter up to 131,072 characters on separate lines). A note at the bottom states: 'Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.'

4. Click on Next

Employee
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label Employee Name

Length Please enter the maximum length for a text field below.
18

Field Name Employee_Name

Description

Previous Next

5. Fill the above as following:
 - 1 Field Label: Employee Name
 - 2 Length : 18
 - 3 Field Name : gets auto generated
 - 4 Click on Next --> Next --> Save and new.

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.

<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
<input checked="" type="radio"/> Date	Allows users to enter a date or pick a date from a popup calendar.
<input type="radio"/> Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
<input type="radio"/> Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass

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 Field Name as “Age” and select formula return type as “Number” and click next.

Step 2. Choose output type

Field Label Age

Field Name Age

Formula Return Type

None Selected

Checkbox

Currency

Date

Date/Time

Number

4. Under Advanced Formula write down the formula and click “Check Syntax” and Next --> Next --> Save & New.

Step 3. Enter formula

Simple Formula Advanced Formula

Age (Number) = `YEAR(TODAY()) - YEAR(Date_of_Birth_c)`

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

Functions

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

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

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “Lookup Relationship” and click Next.
3. Select Employee from the drop down related to the field and click Next.

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

Activity 7 : Creating Remaining Fields in Employee Object

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

Sl No	Object Name	Field

		Field Name	Data type
1	Employee	1 Qualification	Text
		2 Address	Text Area
		3 Experience	Text Area
		4 Phone no	Phone
		5 Email	Email
		6 Joining date	Date
		7 Mode of Work	Picklist: Values <div style="border: 1px solid black; padding: 5px; display: inline-block;">On Site Remote</div>
		8 Cab Allowance	Check box
		9 Food Allowances	Check box

		10 Wifi Allowances	Check box
		11 Cab Allowance Amount	Currency
		12 Food Allowance Amount	Currency
		13 Wifi Allowance Amount	Currency
		14 Login Time	Time
		15 Logout Time	Time
		16 LinkedIn Profile	url

2	Project	<table border="1"> <thead> <tr> <th>Field Name</th><th>Data type</th></tr> </thead> <tbody> <tr> <td>1 Project Name</td><td>Text</td></tr> <tr> <td>2 Project Lead</td><td>Date</td></tr> <tr> <td>3 Start Date</td><td>Date</td></tr> <tr> <td>4 End Date</td><td>Picklist: Values</td></tr> <tr> <td>5 Project Status</td><td> <div style="border: 1px solid black; padding: 5px; display: inline-block;"> Completed On Going Not Yet Started </div> </td></tr> </tbody> </table>	Field Name	Data type	1 Project Name	Text	2 Project Lead	Date	3 Start Date	Date	4 End Date	Picklist: Values	5 Project Status	<div style="border: 1px solid black; padding: 5px; display: inline-block;"> Completed On Going Not Yet Started </div>
Field Name	Data type													
1 Project Name	Text													
2 Project Lead	Date													
3 Start Date	Date													
4 End Date	Picklist: Values													
5 Project Status	<div style="border: 1px solid black; padding: 5px; display: inline-block;"> Completed On Going Not Yet Started </div>													
3	ProjectTask	<table border="1"> <thead> <tr> <th>Field Name</th><th>Data type</th></tr> </thead> <tbody> <tr> <td>1 Project Task</td><td>MDR with project object</td></tr> <tr> <td>2 Finishes in</td><td> Formula : $(\text{Project_Task_r.Start_Date_c} - \text{Project_Task_r.End_Date_c})$ Formula return type: Number Numbers </td></tr> </tbody> </table>	Field Name	Data type	1 Project Task	MDR with project object	2 Finishes in	Formula : $(\text{Project_Task_r.Start_Date_c} - \text{Project_Task_r.End_Date_c})$ Formula return type: Number Numbers						
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1 Project Task	MDR with project object													
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		<table border="1"> <tr> <td>3</td><td>Working Hours</td><td>Master Detail relationship with Employee object</td></tr> <tr> <td>4</td><td>Employee Name</td><td></td></tr> </table>	3	Working Hours	Master Detail relationship with Employee object	4	Employee Name							
3	Working Hours	Master Detail relationship with Employee object												
4	Employee Name													
Note: here in Finishes in field, Start Date and End Date belong to Employee Object.														
4	Asset Service	<table border="1"> <thead> <tr> <th>Field Name</th> <th>Data type</th> </tr> </thead> <tbody> <tr> <td>1 Asset Id</td> <td>Lookup relationship with Asset object</td> </tr> <tr> <td>2 Type</td> <td>Picklist: Values</td> </tr> <tr> <td>3 Technician</td> <td> <div style="border: 1px solid black; padding: 5px; display: inline-block;"> Technical Issue Non Technical Issue </div> </td> </tr> <tr> <td>4 Subject</td> <td>Text</td> </tr> <tr> <td>5 Description</td> <td> Text Area Text Long </td> </tr> </tbody> </table>	Field Name	Data type	1 Asset Id	Lookup relationship with Asset object	2 Type	Picklist: Values	3 Technician	<div style="border: 1px solid black; padding: 5px; display: inline-block;"> Technical Issue Non Technical Issue </div>	4 Subject	Text	5 Description	Text Area Text Long
Field Name	Data type													
1 Asset Id	Lookup relationship with Asset object													
2 Type	Picklist: Values													
3 Technician	<div style="border: 1px solid black; padding: 5px; display: inline-block;"> Technical Issue Non Technical Issue </div>													
4 Subject	Text													
5 Description	Text Area Text Long													

		Field Name	Data type
5	Asset	1 Asset Type	Picklist: Values Laptop Charger Mouse Monitor CPU
		2 Model Name	Text
		3 Employee Name	Lookup relationship with Employee Object
		4 Date Of Issue	Formula (Joining date) Formula Return type: date
		Note: here in the Date of Issue field, the Joining date field belongs to the Employee Object.	

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).

Primarily, there are four levels of access that can be set in Salesforce OWD and they are-

1. Public Read/Write/Transfer
2. Public Read/Write
3. Public Read/Only
4. Private

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.

The screenshot shows the Salesforce Sharing Settings page. In the left sidebar, the 'Sharing Settings' link is highlighted with a red box. In the main content area, the 'Edit' button for the 'Organization-Wide Defaults' section is also highlighted with a red box. The table below lists the default internal and external access levels for various objects.

Object	Default Internal Access	Default External Access
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

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.

Work Type Group	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Employee	Private	Private	<input checked="" type="checkbox"/>
Asset	Public Read/Write	Private	<input checked="" type="checkbox"/>
Asset Service	Public Read/Write	Private	<input checked="" type="checkbox"/>
Project	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Other Settings			
Standard Report Visibility <input checked="" type="checkbox"/> i		Manual User Record Sharing <input type="checkbox"/> i	Manager Groups <input type="checkbox"/> i
Save Cancel			

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

Activity 2:

Set OWD as Private for Project and Asset Service objects.

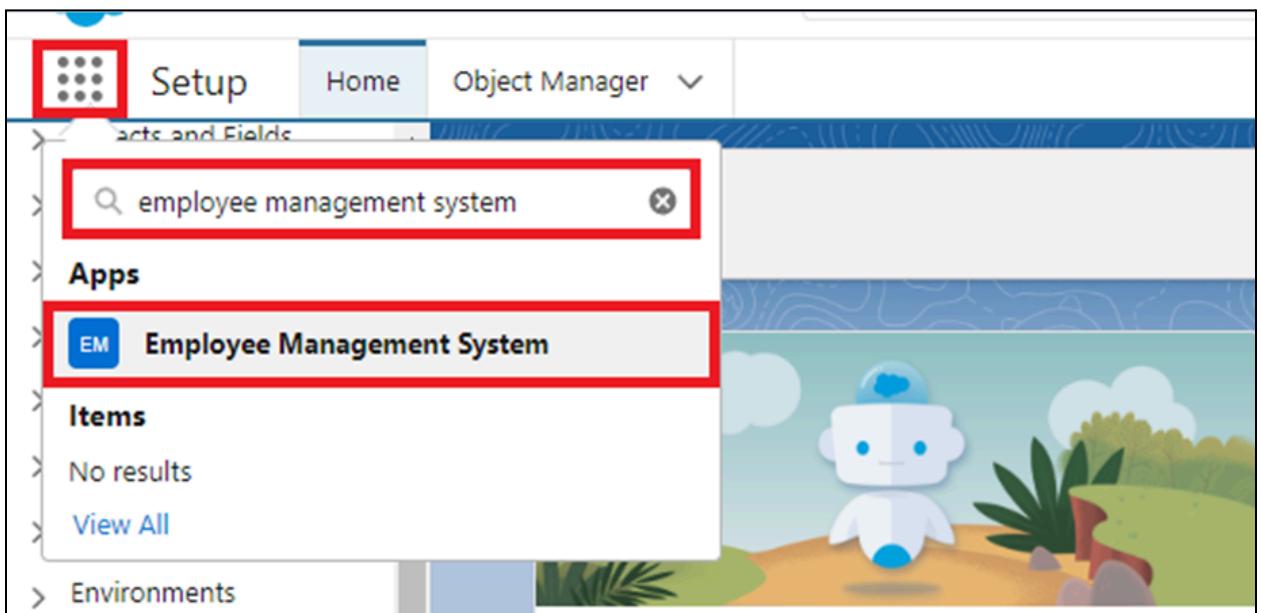
User Adoption:

Use Case:

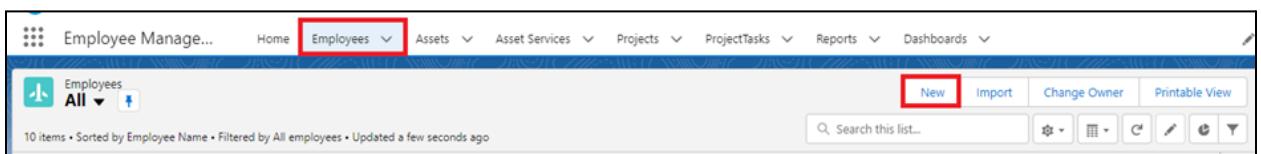
As a new Administrator, you perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuring data access, and much more. In this unit, you will learn about users and how you add users to your Salesforce org.

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>

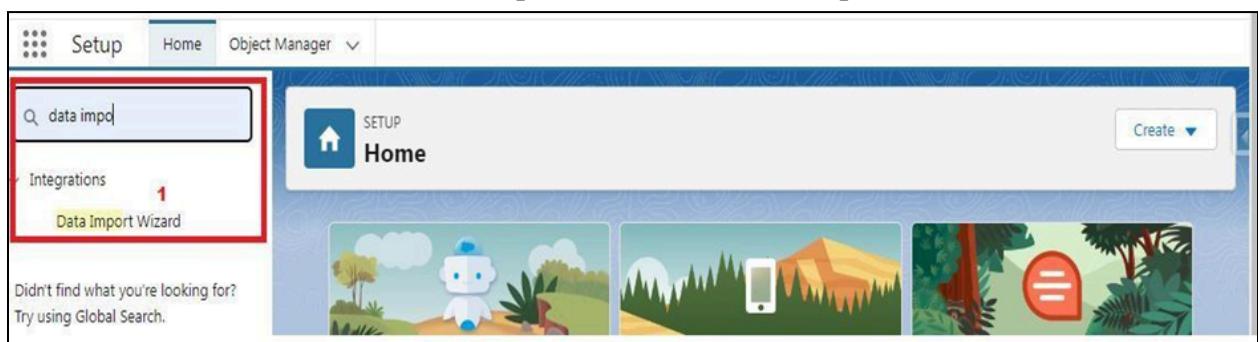
Data Import lets you upload data from external sources and combine it with data you collect via Analytics. You can then use Analytics to organize and analyze all of your data in ways that better reflect your business.

The Data Import Wizard is a Tool makes it easy to import data for many standard Salesforce objects, including accounts, contacts, leads, solutions, campaign members, and person accounts. You can also import data for custom objects.

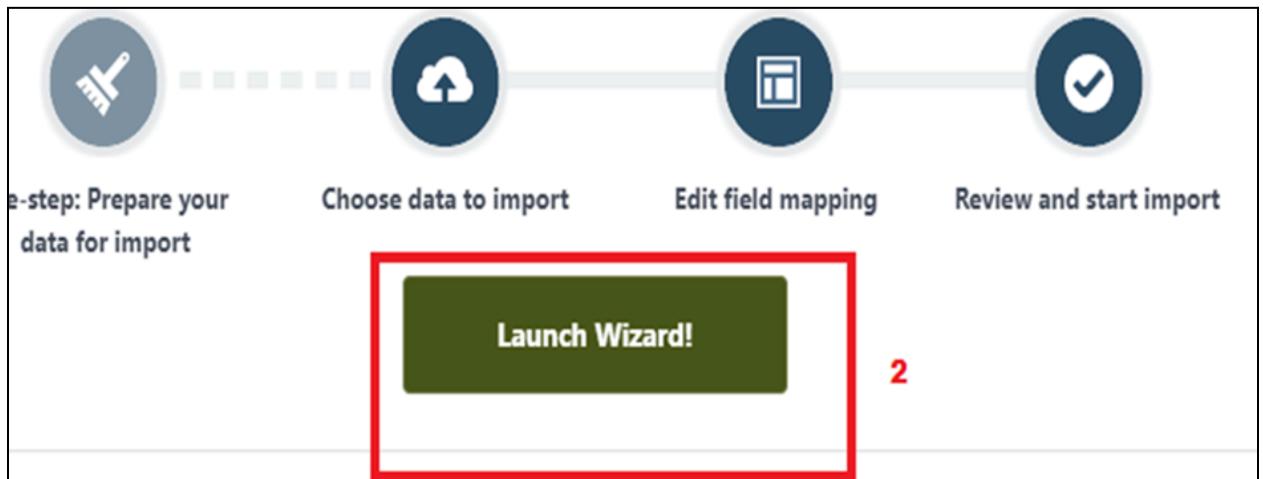
In order to complete this milestone, you need to create CSV files and give them data given in the picture below. After that from these CSV files we will import data for the Employee object.

Activity-1: Importing data using Data Wizard

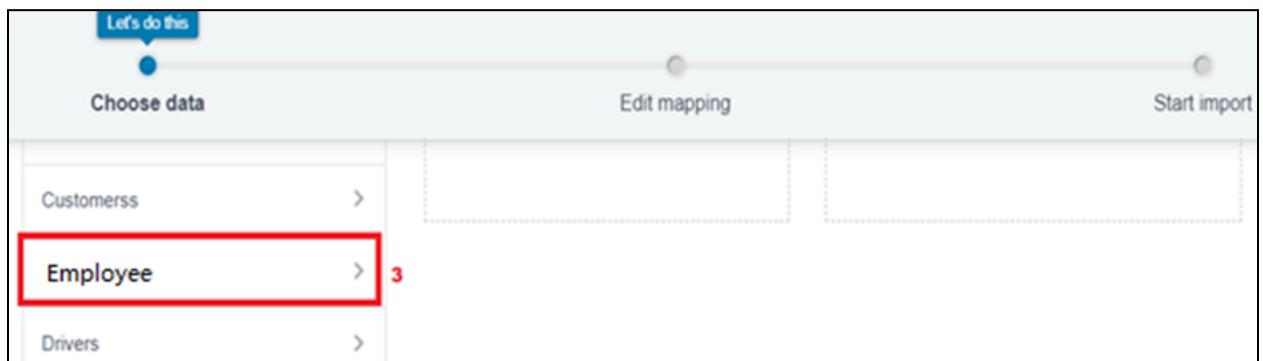
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



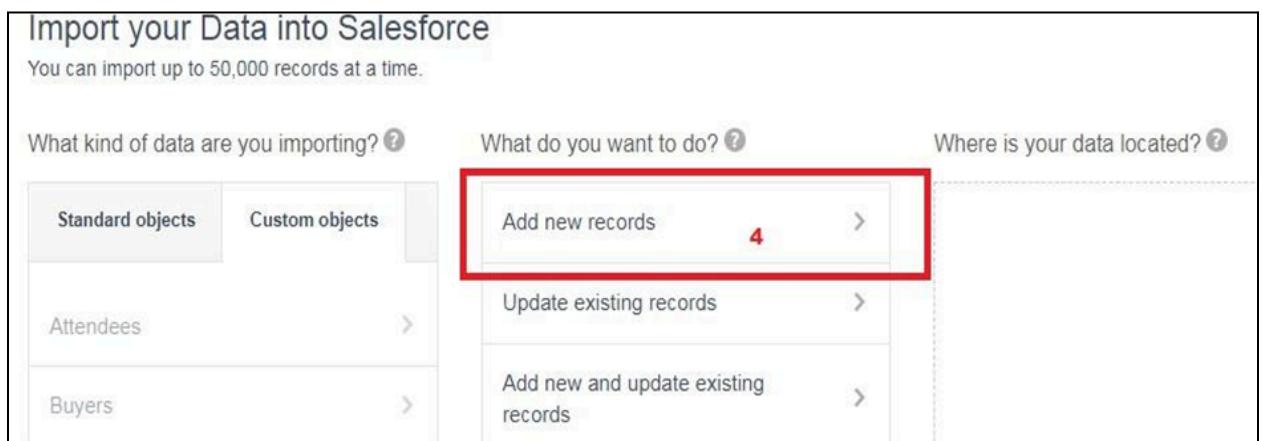
3. Click Launch Wizard!



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.

The screenshot shows the 'Choose data' step of the Data Import Wizard. On the left, under 'What kind of data are you importing?', 'Standard objects' is selected. Under 'Attendees', 'Departments' is highlighted with a green checkmark. In the center, 'Add new records' is selected. On the right, 'Where is your data located?' has a red box around the 'CSV' file input field, which contains the number '5'. At the bottom right, the 'Next' button is highlighted with a green box.

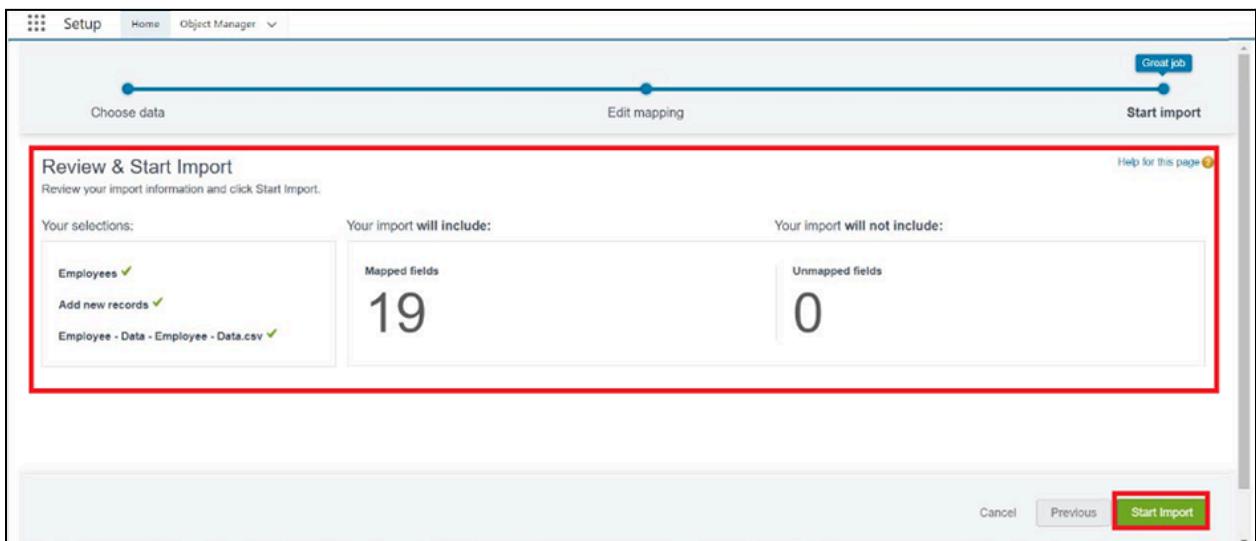
7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.

The screenshot shows the 'Edit Field Mapping' step for the 'Employees' object. A red box highlights the table where field mappings are listed. The table has columns: 'Edit', 'Mapped Salesforce Object', 'CSV Header', 'Example', 'Example', and 'Example'. The rows show mappings for Employee Name, Date of Birth, Gender, Qualification, Address, Experience, and Phone no. At the bottom right, the 'Next' button is highlighted with a green box.

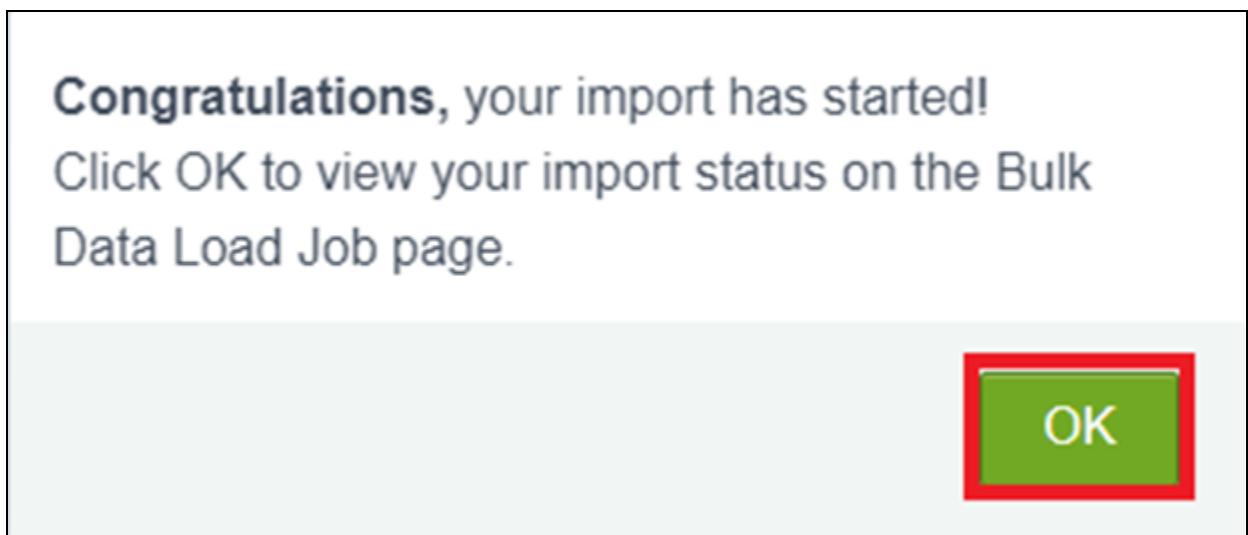
Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Employee Name	Employee Name	Jackie Chan	James	Benjamin
Change	Date of Birth	Date of Birth	01/01/1993	27/02/1998	16/03/1999
Change	Gender	Gender	Male	Male	Male
Change	Qualification	Qualification	B.Tech	B.Tech	B.Com
Change	Address	Address			
Change	Experience	Experience	9	6	5
Change	Phone no	Phone no	7995434750	7995434751	7995434752

Note: no need to map “Reports to” field. The Data Import Wizard is designed to handle basic data import tasks and does not support mapping relationships between records.

8. The next screen gives you a summary of your data import. Click Start Import.



9. Click OK on the popup.



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

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
View Request	View Result	7515000000JeYH4	14/06/2023, 11:54 am	14/06/2023, 11:54 am	100	60	0	14	0	0	Completed	

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

Profiles:

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

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

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

We cannot deleted standard ones

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

2. Custom Profiles:

Custom ones defined by us.

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

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.

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Save **Cancel**

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.

Custom Object Permissions						
	Basic Access	Read	Create	Edit	Delete	Data Administration
		View All			Modify All	
Assets		<input checked="" type="checkbox"/>				
Asset Services		<input checked="" type="checkbox"/>				
Employees		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Session Settings						
Projects		<input type="checkbox"/>				
ProjectTasks		<input type="checkbox"/>				

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.

Role:

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.

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Users', the 'Roles' link is highlighted with a red box. The main content area displays a 'Territory-based Sample' role hierarchy diagram. At the top is 'Executive Staff' (CEO, President, CFO, VP, Sales). Below them are 'Western Sales Director' and 'Eastern Sales Director'. Under 'Eastern Sales Director' is 'International Sales Director'. At the bottom of the hierarchy are 'CA Sales Rep', 'NY Sales Rep', 'MA Sales Rep', 'Asian Sales Rep', and 'European Sales Rep'. A red box highlights the 'Set Up Roles' button at the bottom right of the page.

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

The screenshot shows the 'Your Organization's Role Hierarchy' page. The 'Nick Enterprises' node is expanded. Under 'CEO', the 'HR' and 'Manager' nodes are listed, each with an 'Add Role' link highlighted with a red box. The 'HR' node has two sub-nodes: 'On Site Emp' and 'Remote Emp', each with its own 'Add Role' link highlighted with a red box.

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

Role Edit

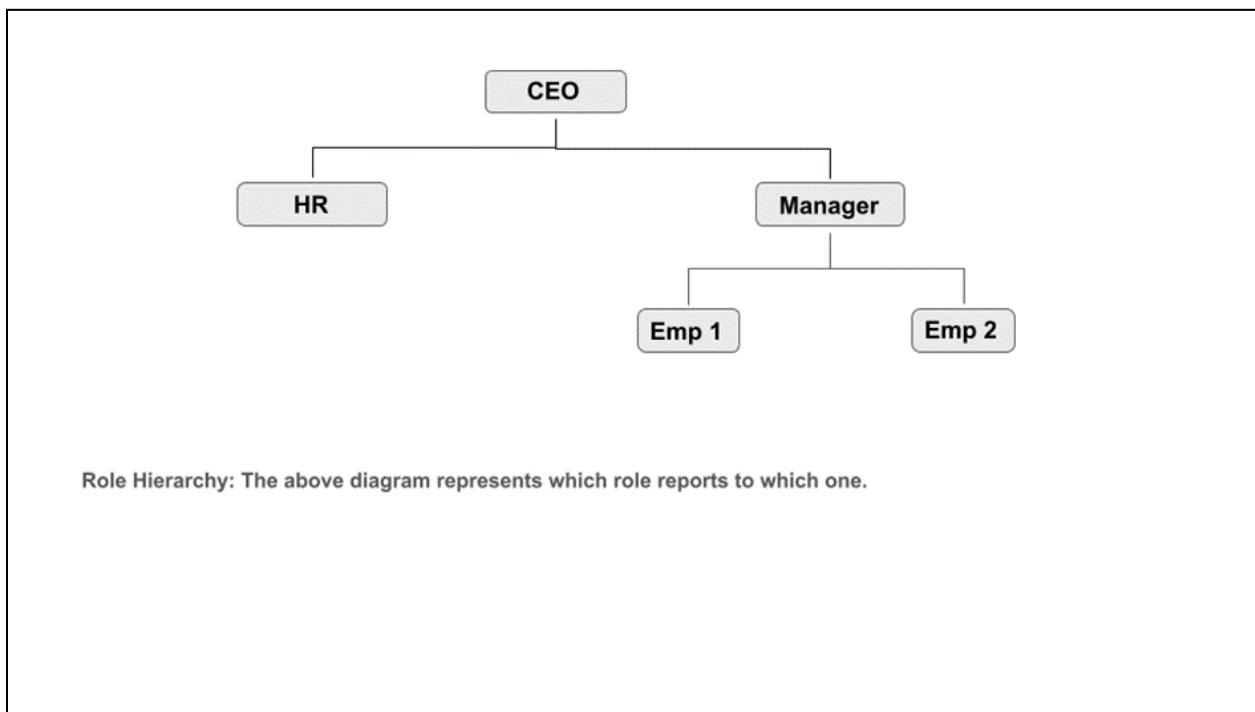
New Role

Role Edit

Label	<input type="text"/>
Role Name	<input type="text"/> i
This role reports to	<input type="text"/> CEO S
Role Name as displayed on reports	<input type="text"/>

[Save](#) [Save & New](#) [Cancel](#)

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



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.

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.

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.

Each user account contains at least the following:

1. Username
2. Email Address
3. User's First Name (optional)
4. User's Last Name
5. Alias
6. Nickname
7. License
8. Profile
9. Role (optional)

Activity 1: Create User

1. Go to setup --> type users in quick find box --> select users --> click New user.
2. Fill in the fields
 1. First Name : Niklaus
 2. Last Name : Mikaelson
 3. Alias : Give a Alias Name
 4. Email id : Give your Personal Email id
 5. Username : Username should be in this form: text@text.text

6. Nick Name : Give a Nickname
7. Role : HR
8. User license: Salesforce
9. Profiles : HR

3. Save.

Activity 2: Creating another user

1. Go to setup --> type users in quick find box --> select users --> click New user.
2. Fill in the fields
 - 1 First Name : Kol
 - 2 Last Name : Mikaelson
 - 3 Alias : Give a Alias Name
 - 4 Email id : Give your Personal Email id
 - 5 Username : Username should be in this form: text@text.text
 - 6 Nick Name : Give a Nickname
 - 7 Role : Manager
 - 8 User license : Salesforce Platform
 - 9 Profiles : Manager
3. Save.

Activity 3: Creating more users-Create two more users as we created in activity 2.

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.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'Employee' typed in. Below it, a table lists one item: 'Employee' with API name 'Employee__c', Type 'Custom Object', Last Modified on '31/05/2023', and a Deployed status. A red box highlights the 'Edit' button at the bottom right of the row.

2. Click on Page layout --> Click on New.

The screenshot shows the 'Page Layouts' section of the Object Manager. On the left, there are tabs for 'Details', 'Fields & Relationships', and 'Page Layouts', with 'Page Layouts' highlighted by a red box. The main area shows a table with one entry: 'Employee Layout' created by 'Nick' on '28/05/2023, 7:34 pm'. A red box highlights the 'New' button at the top right of the table.

3. Give Page layout Name as “On Site Employee Layout” and click on Save.

The screenshot shows the 'Create New Page Layout' dialog. It has a note about cloning layouts. Under 'Existing Page Layout', 'Employee Layout' is selected. In the 'Page Layout Name' field, 'On Site Employee Layout' is typed. A red box highlights both the 'Employee Layout' dropdown and the 'Page Layout Name' input field. At the bottom, there are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red box.

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.

The screenshot shows the Salesforce Layout Editor interface. At the top, there are buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. On the left, a sidebar titled 'Fields' lists various options: Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. The main area displays a table of fields under 'Field Name'. A red box highlights the 'Section' field, which is currently set to 'Blank Space'. Below this table, the page layout is structured into sections:

- Information** (Header visible on edit only):

Employee ID	GEN-2004-001234
Employee Name	Sample Text
Gender	Sample Text
Experience	Sample Text
Email	sarah.sample@company.com
Joining date	21/06/2023
LinkedIn Profile	www.salesforce.com
- Personal Information** (Header visible on edit only):

Date of Birth	21/06/2023
Address	Sample Text
- Allowances** (Header visible on edit only):

Cab Allowance	<input checked="" type="checkbox"/>
Food Allowances	<input checked="" type="checkbox"/>

At the bottom right, there are summary values: Cab Allowance Amount (₹123.45) and Food Allowance Amount (₹123.45). The entire layout is enclosed in a red border.

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

Activity 2 : Creating another page layout

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

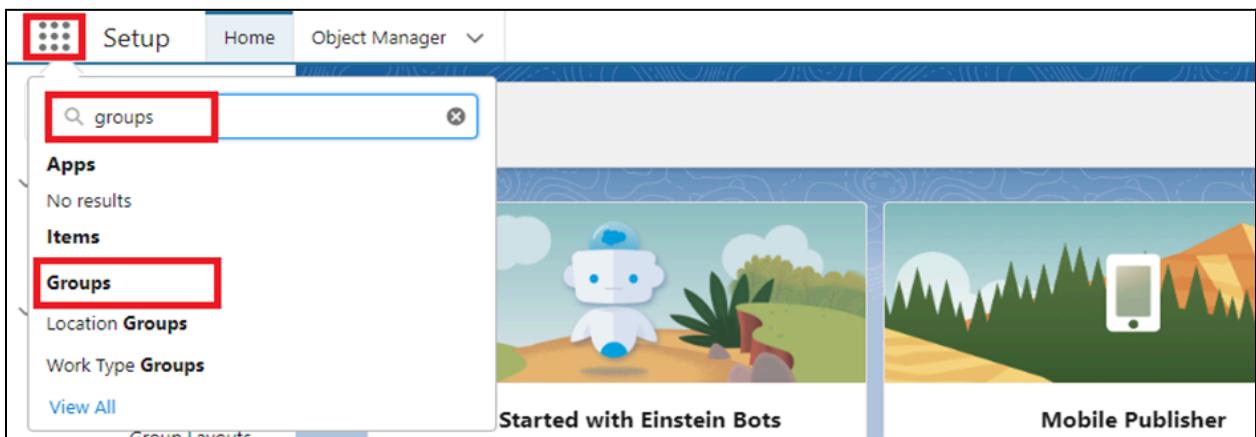
Chatter Group:

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.

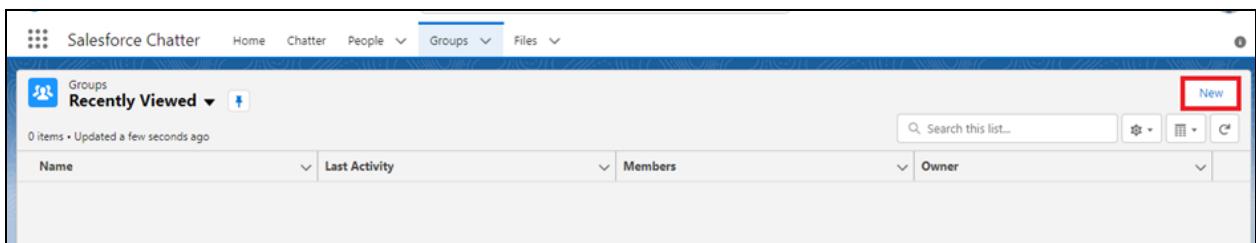
Activity 1 : Creating a chatter group for your organization.

To Create a chatter group:

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



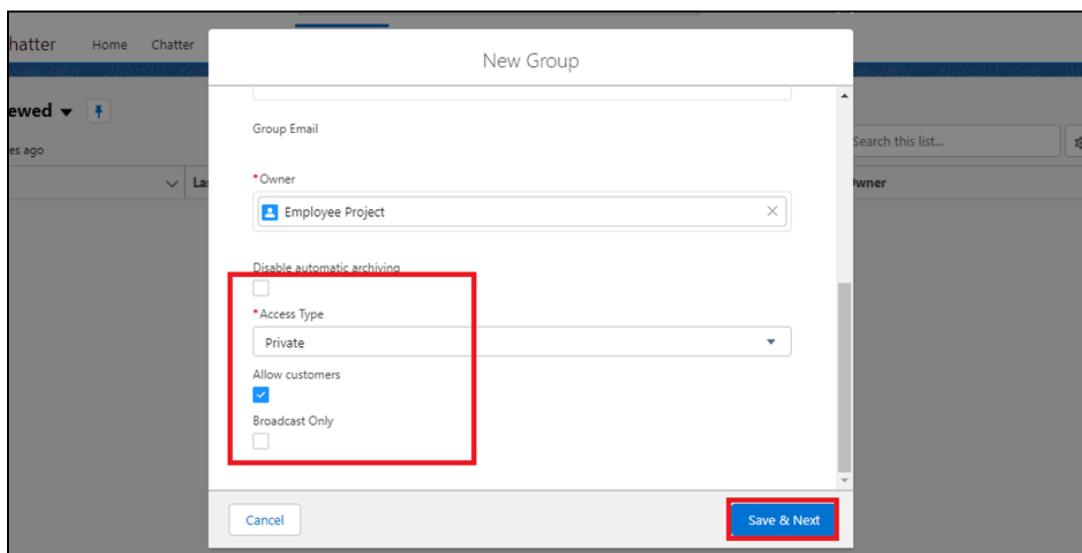
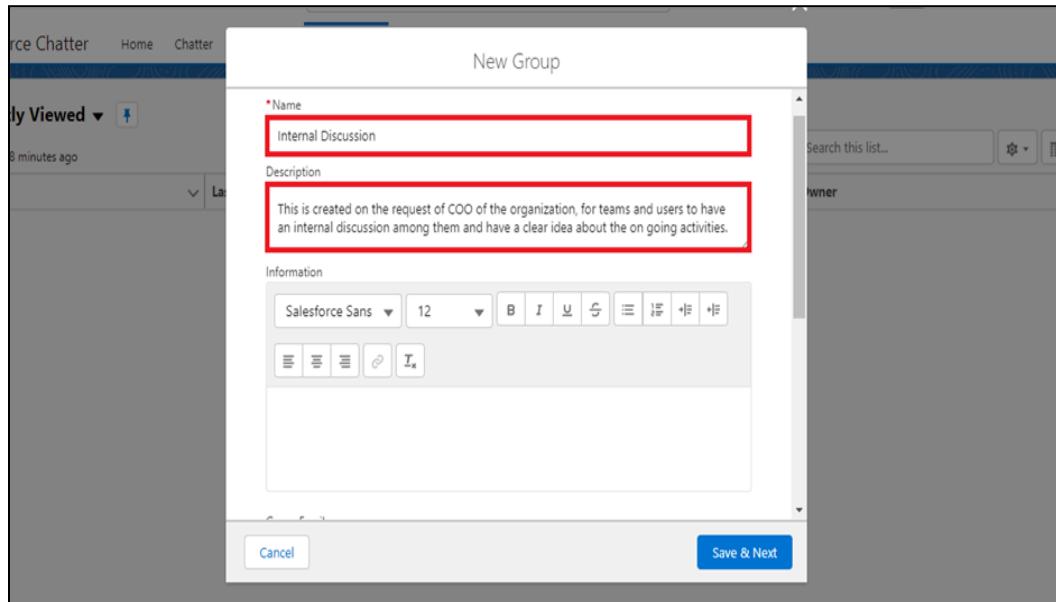
3. Click New.



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

Field	Value

1	Group Name	Internal Discussion
2	Description	Give a understanding Description on your own
3	Access Type	Private
4	Allow Customers	Checked



- 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.

The screenshot shows the 'Manage Members' interface. At the top, there's a search bar labeled 'Search People...' with a magnifying glass icon. Below it is a list of four users, each with a small profile picture and a name: Jason Mikaelson, Elijah Mikaelson, Kol Mikaelson, and Niklaus Mikaelson. To the right of each name is a small 'X' button and a dropdown menu set to 'Member'. At the bottom right of the list area, there's a blue button with a plus sign and the word 'Add'. A red box surrounds the entire list of users. Another red box surrounds the 'Add' button. At the very bottom right of the screen, there's a blue 'Done' button.

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 Internal Discussion Group, here you can post anything which is related to ongoing projects.
10. Click Share.

Note: You can like or comment on this post.

Note: there is a default chatter group in the org with all the active users in it, this activity is to show you how to create a chatter group and add users into it.

Record Types:

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.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Employee'. Below the header, the 'Object Manager' section displays a table with one row for the 'Employee' object. The columns are labeled 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The 'Employee' row has its 'API NAME' field set to 'Employee_c' and its 'TYPE' field set to 'Custom Object'. The 'LAST MODIFIED' field shows the date '01/06/2023'. On the far right of the table, there are 'Edit' and 'Delete' buttons, both of which are highlighted with red boxes. The bottom right corner of the entire interface is also highlighted with a red box.

2. From the left panel click Record Types --> New.

The screenshot shows the 'Object Manager' interface for the 'Employee' object. The left sidebar lists various 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 'Record Types' option is highlighted with a red box. The main content area is titled 'Record Types' and shows a table with one row. The columns are labeled 'RECORD TYPE LABEL', 'DESCRIPTION', 'ACTIVE', and 'MODIFIED BY'. The table shows a single entry with the label '0 Items. Sorted by Record Type Label'. At the top right of this section, there is a 'New' button, which is also highlighted with a red box. The bottom right corner of the entire interface is highlighted with a red box.

3. Give Record Type Label as “On Site Employee” and make it active.

New Record Type
Employee

Step 1. Enter the details

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type

Existing Record Type: --Master--
Record Type Label: On Site Employee
Record Type Name: On_Site_Employee
Description:
Active:

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	Make Available	Make Default
Analytics Cloud Integration User	<input type="checkbox"/>	<input type="checkbox"/>	
Analytics Cloud Security User	<input type="checkbox"/>	<input type="checkbox"/>	
Chatter External User	<input type="checkbox"/>	<input type="checkbox"/>	

4. Uncheck for “Make Available”.

Profile Name	Record Types Currently Available	Make Available	Make Default
Analytics Cloud Integration User	<input type="checkbox"/>	<input type="checkbox"/>	
Analytics Cloud Security User	<input type="checkbox"/>	<input type="checkbox"/>	
Chatter External User	<input type="checkbox"/>	<input type="checkbox"/>	
Chatter Free User	<input type="checkbox"/>	<input type="checkbox"/>	

5. Scroll down and check for the Manager & System Administrator profile and click on Next.

Force.com - Free User	<input type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
HR	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	<input type="checkbox"/>	<input type="checkbox"/>
Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input type="checkbox"/>	<input type="checkbox"/>
On Site Employee	<input type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input type="checkbox"/>	<input type="checkbox"/>
Remote Employee	<input type="checkbox"/>	<input type="checkbox"/>
Salesforce API Only System Integrations	<input type="checkbox"/>	<input type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input type="checkbox"/>	<input type="checkbox"/>
Standard User	<input type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Work.com Only User	<input type="checkbox"/>	<input type="checkbox"/>

6. Select “Apply a different layout for each profile”, and change page layout to On Site Employee Layout for manager profile and System Administrator.

Employee Record Type	On Site Employee
Record Type Name	On_Site_Employee
Description	
Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.	
<input type="radio"/> Apply one layout to all profiles <input style="border: 1px solid #ccc; padding: 2px 10px; margin-left: 10px;" type="button" value="Select Page Layout"/> <input checked="" type="radio"/> Apply a different layout for each profile	
Profile:	Page Layout
Analytics Cloud Integration User	Employee Layout
Analytics Cloud Security User	Employee Layout

Custom: Sales Profile	Employee Layout
Custom: Support Profile	Employee Layout
Force.com - App Subscription User	Employee Layout
Force.com - Free User	Employee Layout
Gold Partner User	Employee Layout
HR	Employee Layout
Identify User	Employee Layout
Manager	On Site Employee layout
Marketing User	Employee Layout
Minimum Access - Salesforce	Employee Layout
On Site Employee	Employee Layout
Partner App Subscription User	Employee Layout
Partner Community Login User	Employee Layout
Partner Community User	Employee Layout
Read Only	Employee Layout
Remote Employee	Employee Layout
Salesforce API Only System Integrations	Employee Layout
Silver Partner User	Employee Layout
Solution Manager	Employee Layout
Standard Platform User	Employee Layout
Standard User	Employee Layout
System Administrator	On Site Employee layout
Work.com Only User	Employee Layout

Previous Save & New **Save** Cancel

7. click Save.

Activity 2: Creating "Remote Employee" Record Type

Create another Record Type with name “Remote Employee” 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.

The screenshot shows the Salesforce Setup interface. The top navigation bar has 'Setup' and 'Home' tabs, with 'Home' highlighted. Below it is a search bar labeled 'Search Setup'. The main content area is titled 'Permission Sets' and contains a table of existing permission sets. A red box highlights the 'New' button at the top left of the table. The table columns are 'Action', 'Permission Set Label', 'Description', and 'License'. The first row in the table is highlighted with a red box. The 'Description' column for this row states: 'Allows access to the store. Lets users see products and categories... B2B Buyer Permission Set One Seat'. The 'Label' column shows 'Adding Employee' and the 'API Name' column shows 'Buyer'. Other rows include 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', and 'Contact Center Agent'. A red box also highlights the 'Permission Sets' link in the sidebar under the 'Users' section.

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

The screenshot shows the 'Create Permission Set' dialog box. At the top, there are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red box. The form has a title 'Enter permission set information'. It includes fields for 'Label' (containing 'Per to Emp'), 'API Name' (containing 'Per_to_Emp'), and 'Description'. The 'Session Activation Required' checkbox is checked. A red box highlights the 'Label' and 'API Name' fields.

3. Under Apps Select object settings.

The screenshot shows the 'Apps' section of the Salesforce setup. On the left, there's a sidebar with the text: 'Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform' and a 'Learn More' link. The main area lists several settings categories:

- 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. This category is highlighted with a red box.
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers".
- Apex Class Access**: Permissions to execute Apex classes.
- Visualforce Page Access**: Permissions to execute Visualforce pages.
- External Data Source Access**: Permissions to authenticate against external data sources.
- Flow Access**: Permissions to execute Flows.
- Named Credential Access**: Permissions to authenticate against named credentials.
- Custom Permissions**: Permissions to access custom processes and apps.
- Custom Metadata Types**: Permissions to access custom metadata types.
- Custom Setting Definitions**: Permissions to access custom settings.

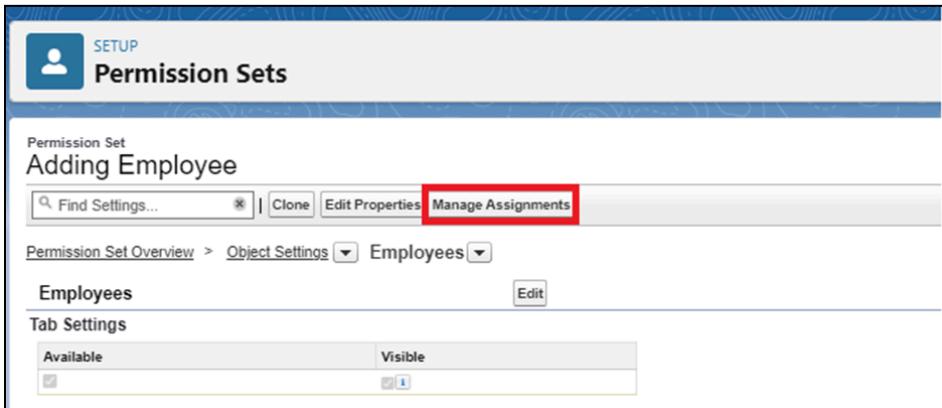
4. Click on Employee object --> click on Edit --> under object permission check for read and create.

The screenshot shows the 'Adding Employee' page within a permission set. At the top, there are buttons for 'Find Settings...', 'Clone', 'Edit Properties', and 'Manage Assignments'. Below that, the breadcrumb navigation shows 'Permission Set Overview > Object Settings > Employees'. The main area is titled 'Employees' with 'Save' and 'Cancel' buttons. It contains two sections: 'Tab Settings' and 'Employee: Record Type Assignments'. Under 'Tab Settings', there's a table with columns 'Available' and 'Visible'. Under 'Employee: Record Type Assignments', there's a table showing record types and assigned record types. The bottom section is 'Object Permissions', which is highlighted with a red box. It has a table with columns 'Permission Name' and 'Enabled'. The 'Read' and 'Create' permissions are checked (marked with a blue checkmark). Other permissions like 'Edit', 'Delete', 'View All', and 'Modify All' are not checked.

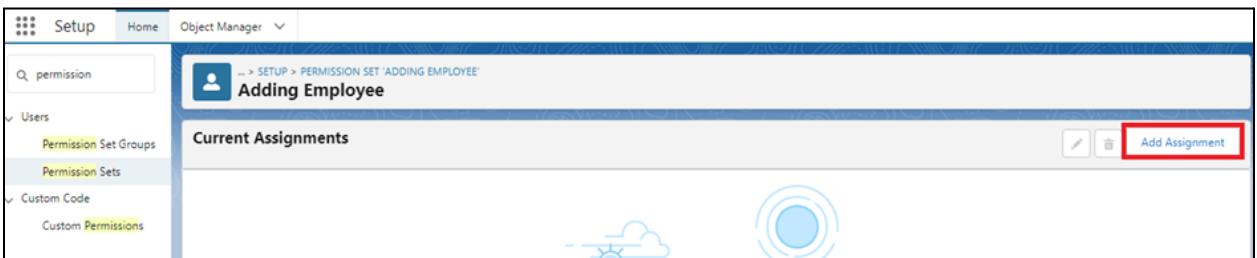
Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

5. Click on Save.

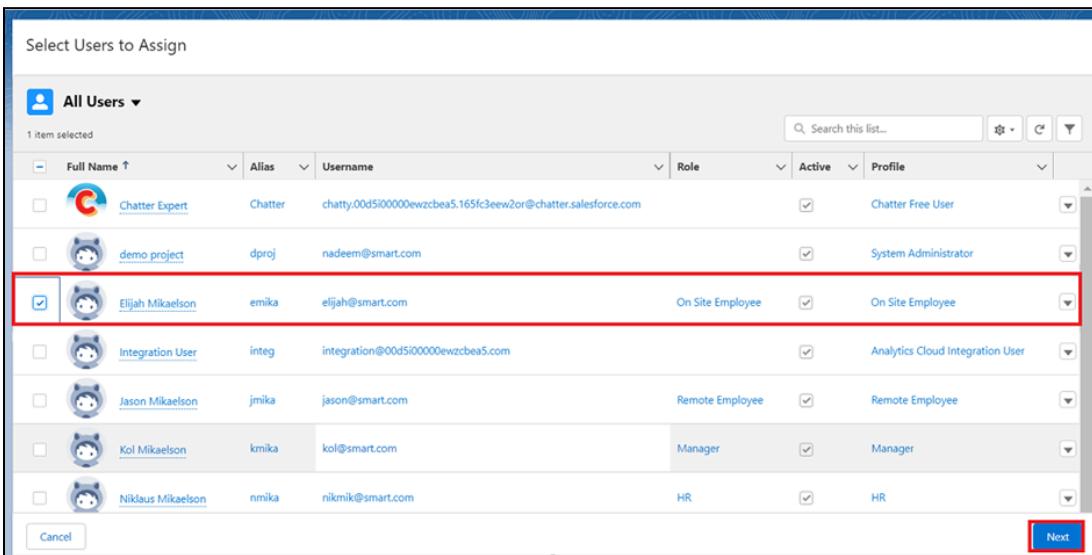
6. After saving the permission click on the Manage assignment



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

11. Click on Done.

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.

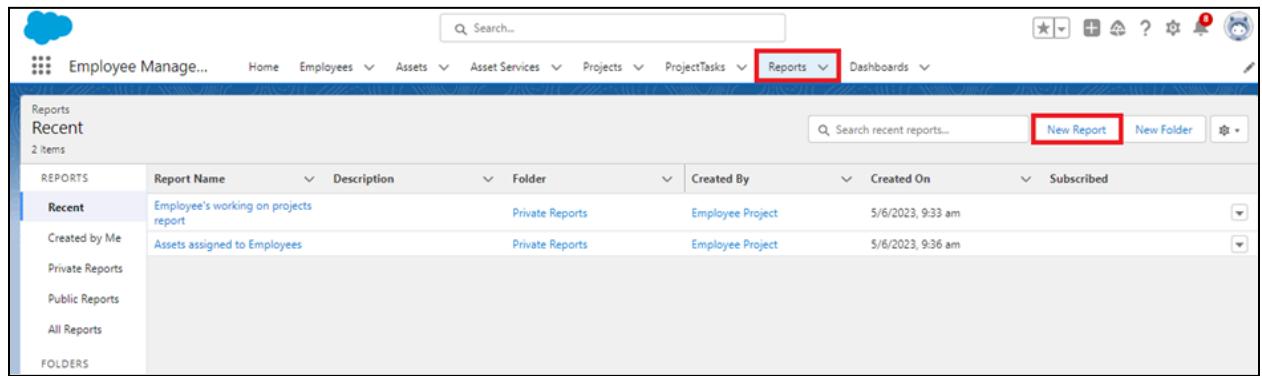
Types of Reports in Salesforce

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 reports tab
2. Click New Report.



The screenshot shows the Salesforce interface for managing reports. At the top, there's a navigation bar with links for Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports (which is currently selected and highlighted with a red box), and Dashboards. Below the navigation is a search bar labeled 'Search...'. On the left, there's a sidebar with sections for Reports, Recent (2 items), Created by Me, Private Reports, Public Reports, All Reports, and FOLDERS. The main area displays a table of recent reports. The table has columns for REPORTS, Report Name, Description, Folder, Created By, Created On, and Subscribed. Two reports are listed: 'Employee's working on projects report' and 'Assets assigned to Employees'. Both reports are categorized under 'Private Reports' and were created by 'Employee Project' on 5/6/2023 at 9:33 am. A red box highlights the 'New Report' button located in the top right corner of the main report list area.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Employee's working on projects report		Private Reports	Employee Project	5/6/2023, 9:33 am	
Created by Me	Assets assigned to Employees		Private Reports	Employee Project	5/6/2023, 9:36 am	

3. Select report type from category or from report type panel or from search panel --> click on start report.

The screenshot shows the 'Create Report' screen. On the left, there's a sidebar with categories like 'Recently Used', 'All', and various business objects. In the center, a search bar is highlighted with the text 'employee'. Below it is a table of report types with columns for 'Report Type Name' and 'Category'. One row, 'Employees', is selected and highlighted. To the right, a panel titled 'Details' shows information about the selected report, including its name ('Employees'), category ('Standard'), and a 'Start Report' button which is also highlighted with a red box.

4. Customize your report

--> Add fields from left pane as shown below

The screenshot shows the 'Employee Management' report builder. On the left, there's a 'Fields' pane with sections for 'Groups' (containing 'GROUP ROWS' and 'Add group...') and 'Columns' (containing 'Add column...', 'Employee Name', 'Employee ID', 'Reports to', 'Login Time', 'Logout Time', 'Mode of Work', and 'LinkedIn Profile'). A red box highlights the 'Add column...' button. On the right, there's a preview table with two rows of data. The first row has columns for Employee Name, Employee ID, Reports to, Login Time, Logout Time, Mode of Work, and LinkedIn Profile. The second row has similar columns with specific values. A red box highlights the preview table area.

5. Save or run it.

Note: Reports may get varied from the above pictures as the data might be different.

Activity 2: Create 2 more Report

1. Create a report with report type: “Employees with ProjectTasks and Projects”.
2. Create a report with report type: “Employees with Assets”.

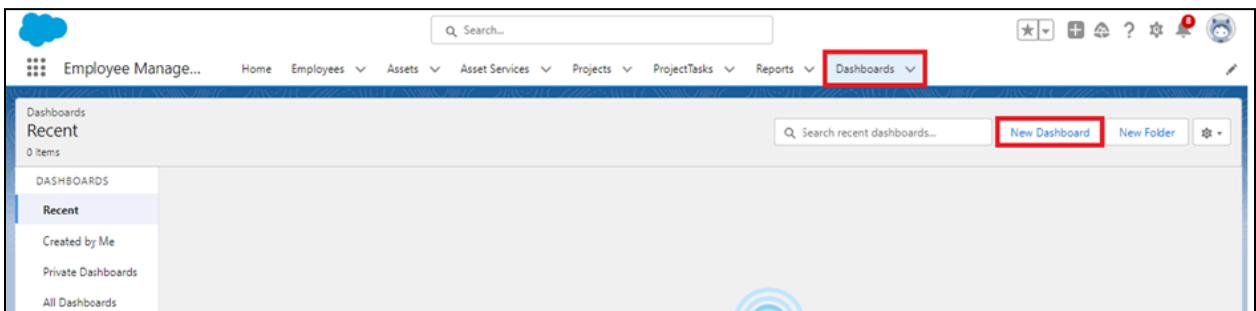
Dashboards:

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

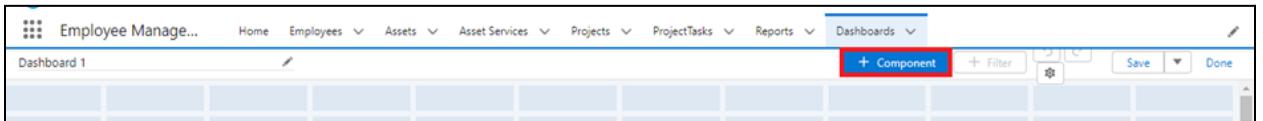
1. Go to the app --> click on the Dashboards tabs.



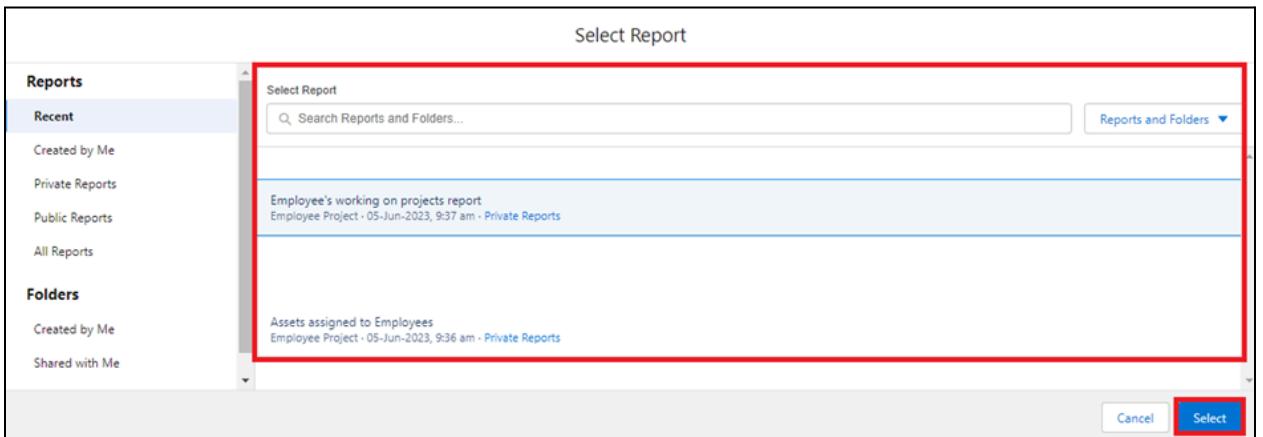
2. Give a Name and click on Create.

A screenshot of a 'New Dashboard' creation dialog box. The title bar says 'New Dashboard'. The form contains three fields: 'Name' (with placeholder 'Dashboard 1'), 'Description' (an empty text area), and 'Folder' (set to 'Private Dashboards' with a 'Select Folder' button). At the bottom right are two buttons: 'Cancel' and 'Create', with 'Create' having a red box around it.

3. Select add component.



4. Select a Report and click on select.



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

Activity 2:

Create another Dashboard as we discussed in activity 1.

The screenshot shows a dashboard titled 'Dashboard 2' with a timestamp 'As of 08-Oct-2024, 7:47 pm Viewing as Akanksha Rath'. The dashboard features two cards: 'Employee Details with Assets' and 'Employee Details with Projects'. Each card contains a table with employee details and a 'View Report' link.

Employee ID	Employee Name	Joining date	Asset ID	Asset Name
EMS-0002	Jackie Chan	04/12/2012	-	-
EMS-0003	James	12/05/2017	-	-
EMS-0004	Benjamin	14/09/2018	-	-
EMS-0005	Alexander	15/05/2021	-	-
EMS-0006	William	20/05/2021	-	-
EMS-0007	Ethan	27/02/2021	-	-
EMS-0008	Emma	13/11/2020	-	-

[View Report \(Employee Details with Assets\)](#)

Employee ID	Employee Name	Experience	Project Task	Project ID	Project Task Name
EMS-0002	Jackie Chan	9	-	-	-
EMS-0003	James	6	-	-	-
EMS-0004	Benjamin	5	-	-	-
EMS-0005	Alexander	2	-	-	-
EMS-0006	William	2	-	-	-
EMS-0007	Ethan	2	-	-	-
EMS-0008	Emma	3	-	-	-

[View Report \(Employee Details with Projects\)](#)