## WORKFORCE ADMINISTRATOR & DEVELOPER SOLUTION By

### Chaturya Muppalla

Email – chaturya muppalla@srmap.edu.in SKILL WALLET ID – SWUID20240026034

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

#### **INDEX Page:**

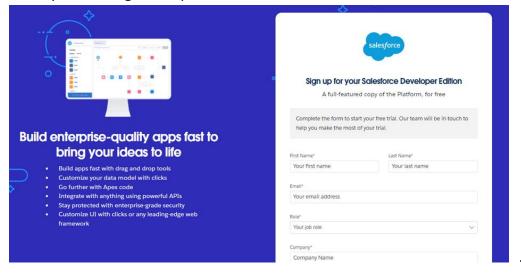
Topics Page no		
Salesforce	 01	
Object	 02	
Tabs	 03	
The Lightning App	 04	
Fields & Relationships	 05	
Setting OWD	 06	
User Adoption	 07	
Import Data	 	30
Profiles	 09	
Role	 10	
Users	 10	
Page layouts	 11	
Chatter Group	 12	
Record Types	 13	
Permission sets	 14	
Reports	 15	
Dashboards	 16	

#### Introduction:

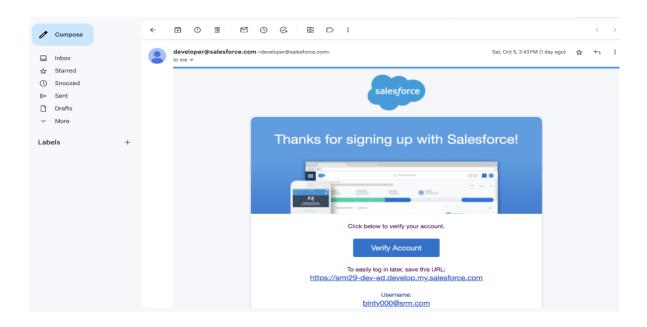
Workforce Administration Solution is a software application or platform designed to streamline and automate various aspects of employee's working on projects and Asset Assignment processes within an organization. It serves as a centralized system for managing employee data, number of projects an employee is working on, tracking employee performance, and keeping record for the assets which they are assigned to. In an effort to enhance data security and performance while simplifying system administration, Workforce Administration Solution is transitioning to Salesforce, a new cloud technology. By leveraging this advanced platform, the company can ensure the safe storage of sensitive data through robust encryption and proactive backup mechanisms. The cloud's automated data replication capabilities provide added protection and efficient disaster recovery solutions. With access to scalable resources, Workforce Administration Solution can optimize performance, ensuring fast and reliable access to data. This shift to the new cloud technology streamlines administrative tasks, reducing complexity and allowing system administrators to focus on higher-value activities, ultimately increasing productivity and enhancing overall operational efficiency

**Task 1: Salesforce** 

Activity 1: Creating Developer Account

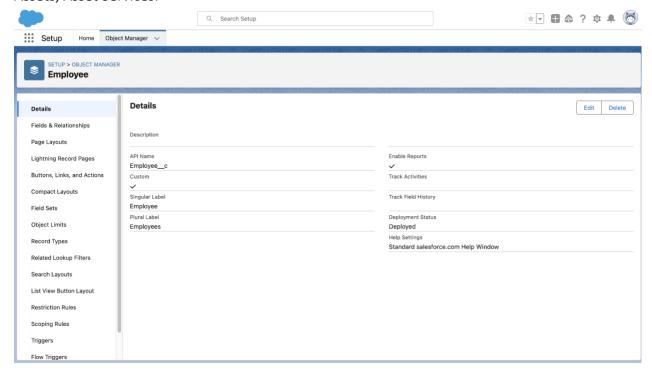


**Activity 2: Account Activation** 



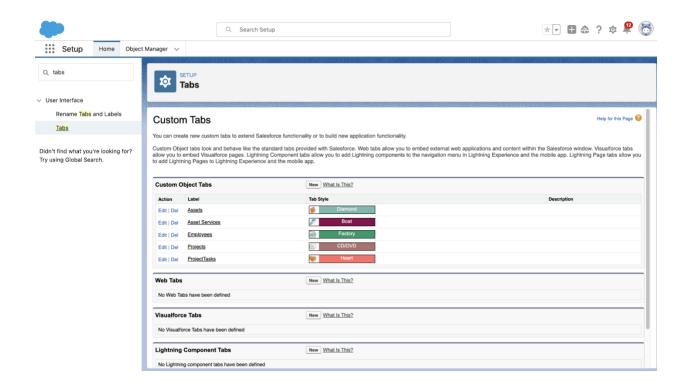
#### Task 2: Object

Activity - Create 5 objects with label names as Employees, Projects, ProjectTasks, Assets, Asset Services.



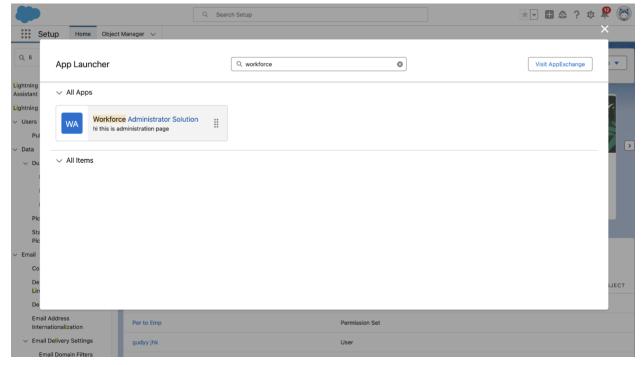
#### Task 3: Tabs

Activity: Creating 5 Custom Tabs - Employees, Projects, ProjectTasks, Assets, Asset Services.



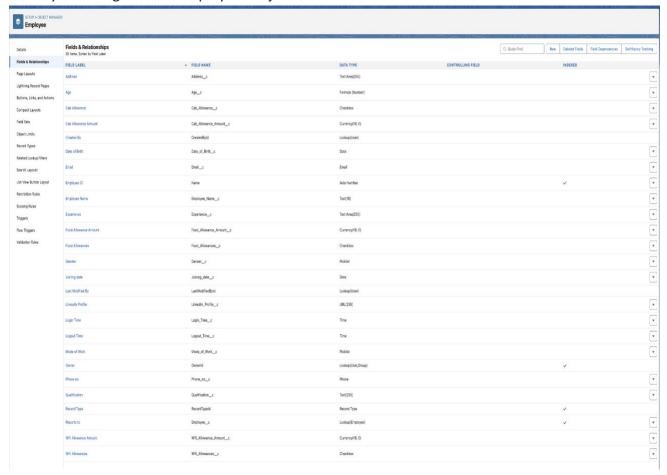
#### Task 4: The Lightning App

Activity: Create a Lightning App - Workforce Administration Solution.

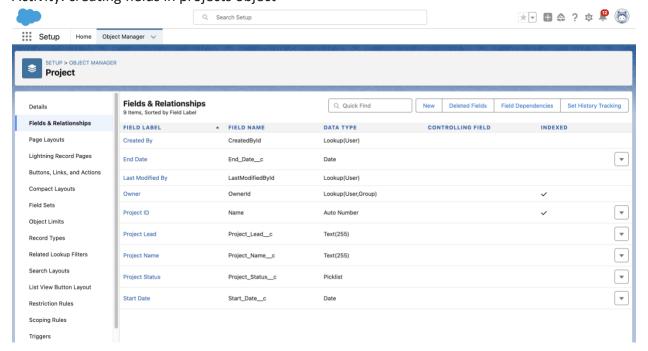


Task 5: Fields & Relationships

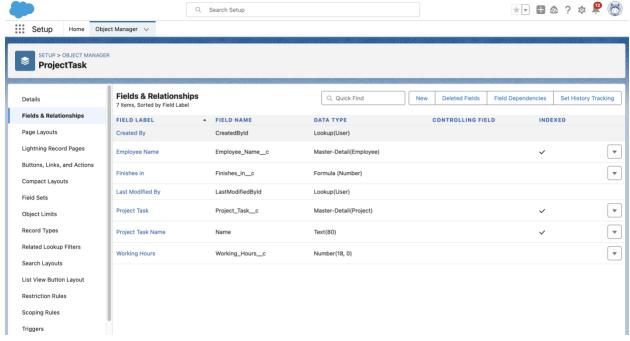
#### Activity: Creating fields in Employees object



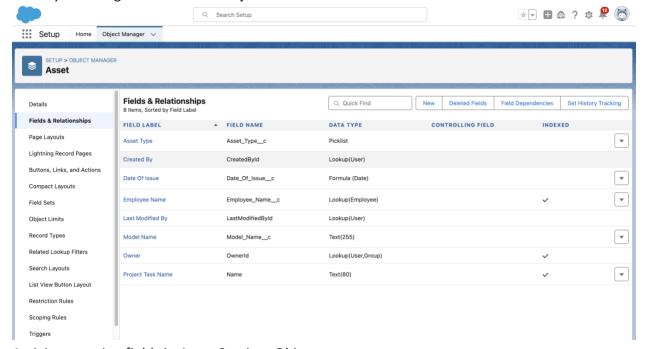
#### Activity: creating fields in projects object



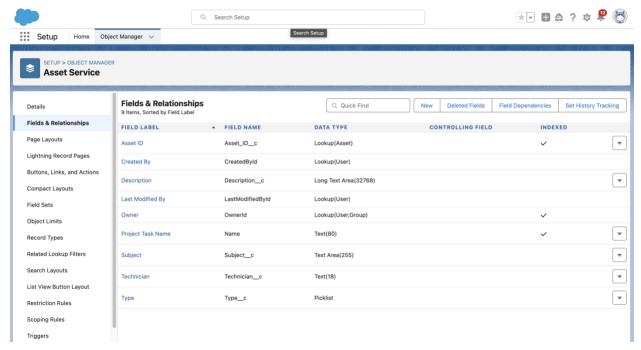
Activity: creating fields in ProjectTasks object.



Activity: creating fields in Assets object.

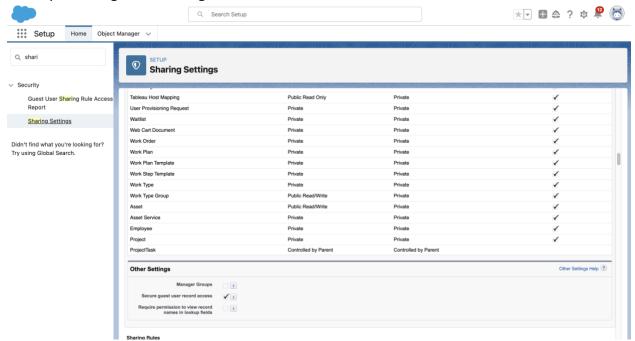


Activity: creating fields in Asset Services Object.



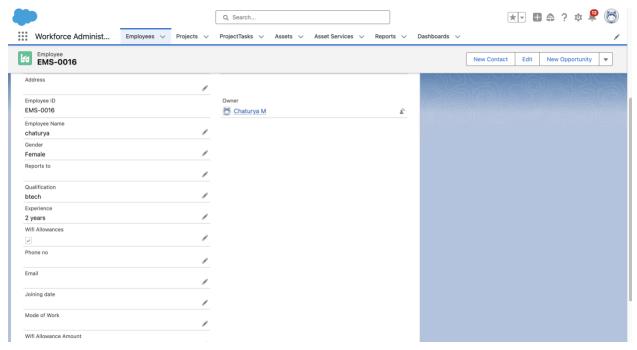
**Task 6: Setting OWD** 

Activity: Creating OWD Setting.

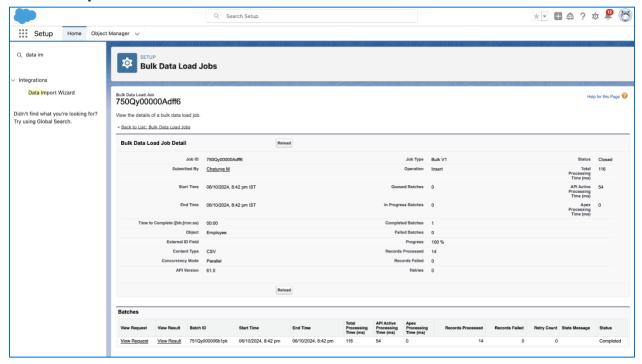


Task 7: User Adoption

Activity 2: View a Record (Employee)

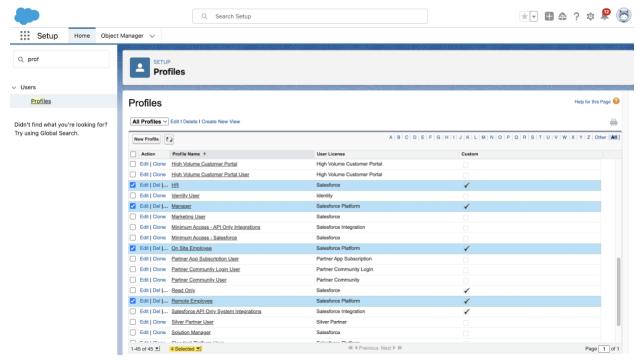


#### **Task 8: Import Data**



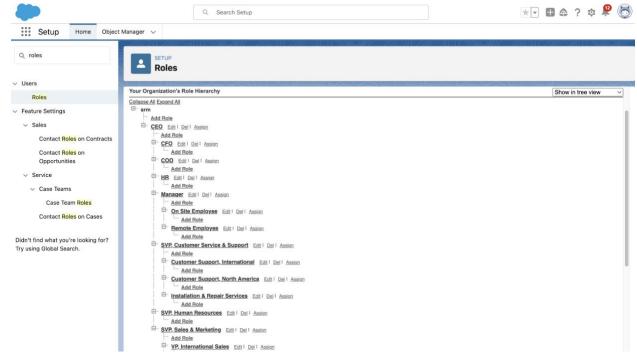
**Task 9: Profiles** 

Creating profiles: HR, Manager, On-site employee, Remote employee



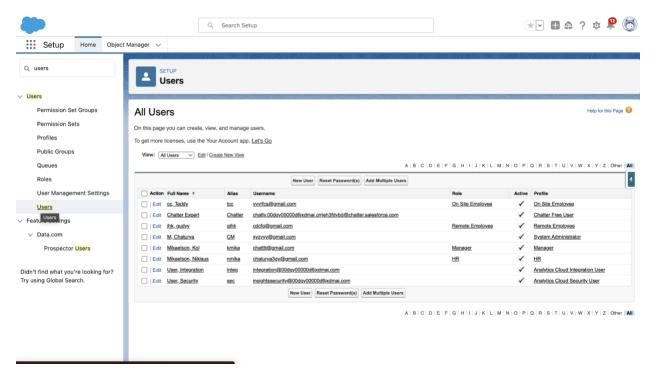
#### Task 10: Roles

Activity: Assigning Roles: HR, Manager, On-site employee, Remote Employee



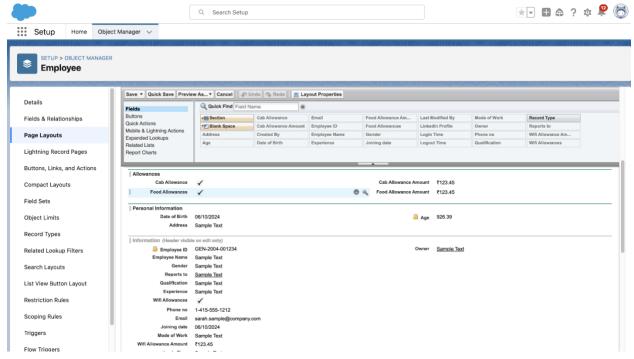
Task 11: User

**Activity: Creating Users** 

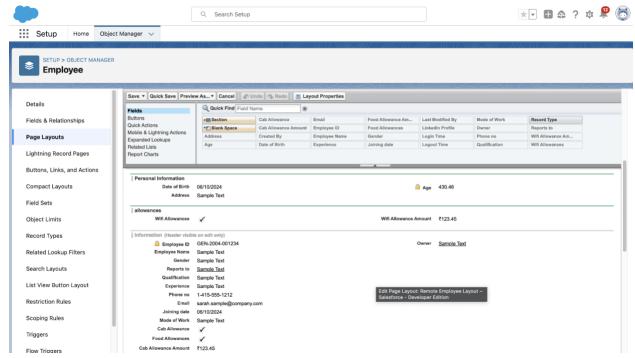


#### **Task 12: Page Layouts**

Activity: creating a page layout for Employee object - On Site Employee

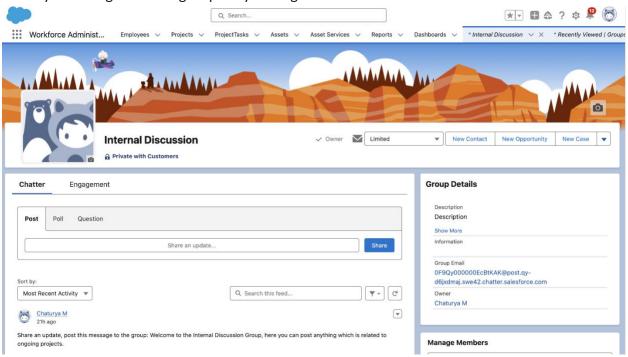


Activity: creating a page layout for Employee object - Remote Employee



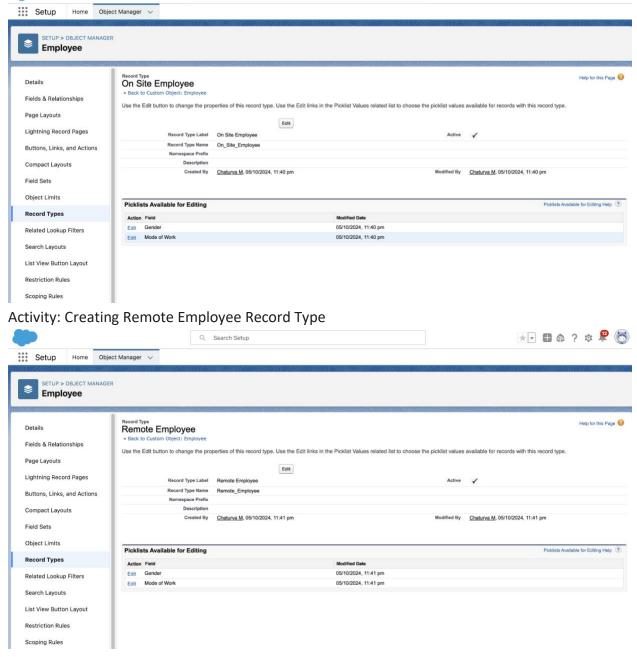
#### **Task 13: Chatter Group**

Activity: Creating a chatter group for your organization



Task 14: Record Types

Activity: Creating On Site Employee Record Type

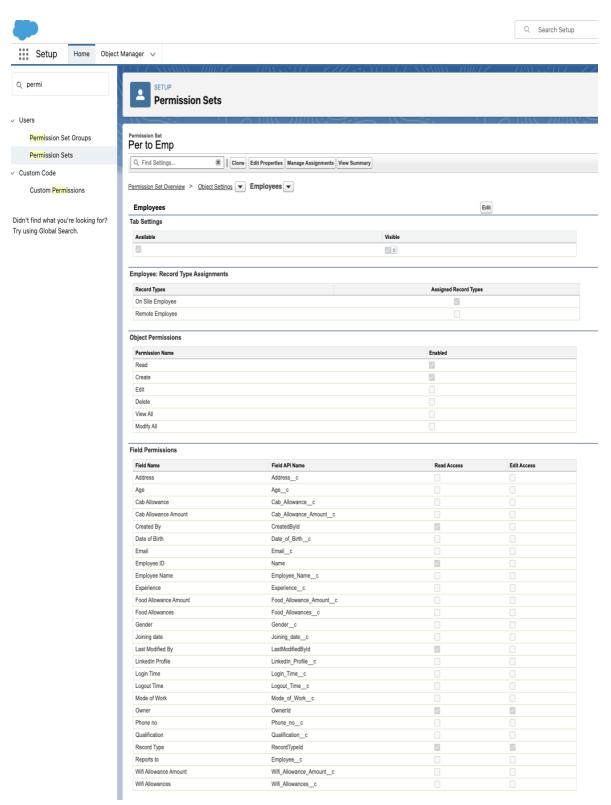


Q Search Setup

\* - 🖩 🕾 ? 🌣 🚇 👩

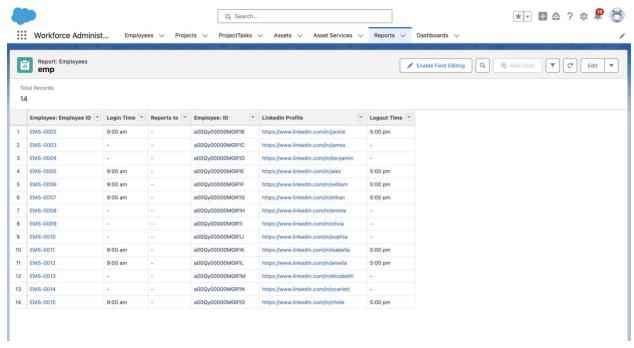
**Task 15: Permission Sets** 

Activity: Creating a permission set for employee object

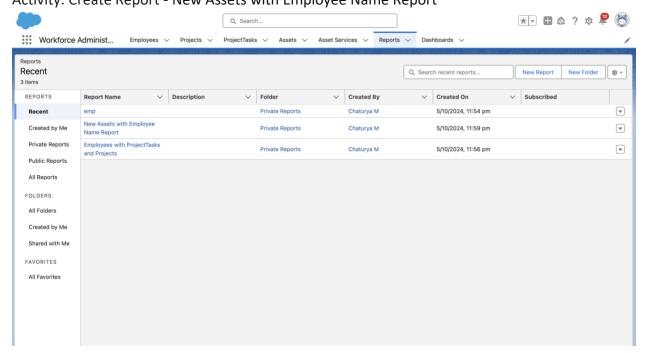


Task 16: Reports

Activity: Create Report - New Employees Report

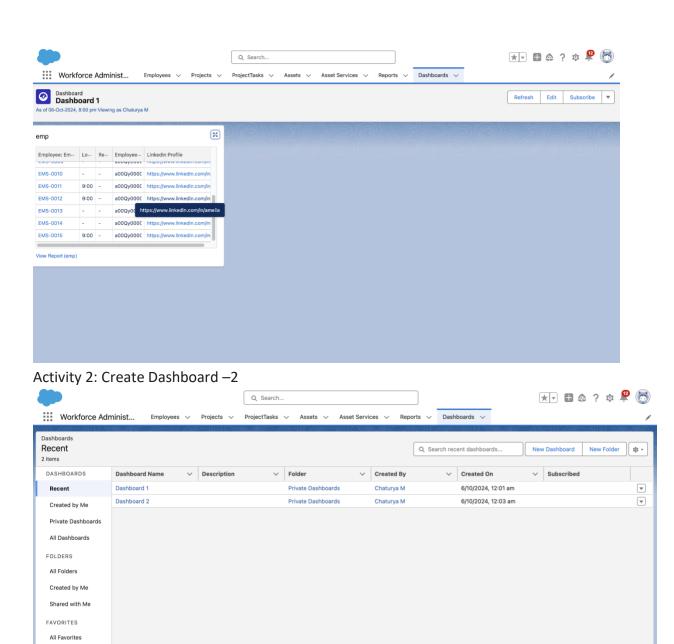


Activity: Create Report - Employees with ProjectTasks and Projects Activity: Create Report - New Assets with Employee Name Report



Task 17: Dashboards

Activity 1: Create Dashboard -1



# Thank You