

# **Workforce Administration Solution (Admin)**

By

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# **Project Abstract**

The Workforce Administration Solution is a comprehensive software application designed to optimize and automate the management of employee activities and asset assignments within an organization. This platform serves as a centralized system for efficiently handling employee data, tracking the number of projects each employee is engaged in, monitoring performance metrics, and maintaining detailed records of assets assigned to employees. By streamlining these processes, the Workforce Administration Solution enhances operational efficiency, promotes better resource allocation, and provides valuable insights into workforce productivity and asset utilization. This solution aims to support organizational growth and operational excellence through improved workforce management and asset tracking capabilities.

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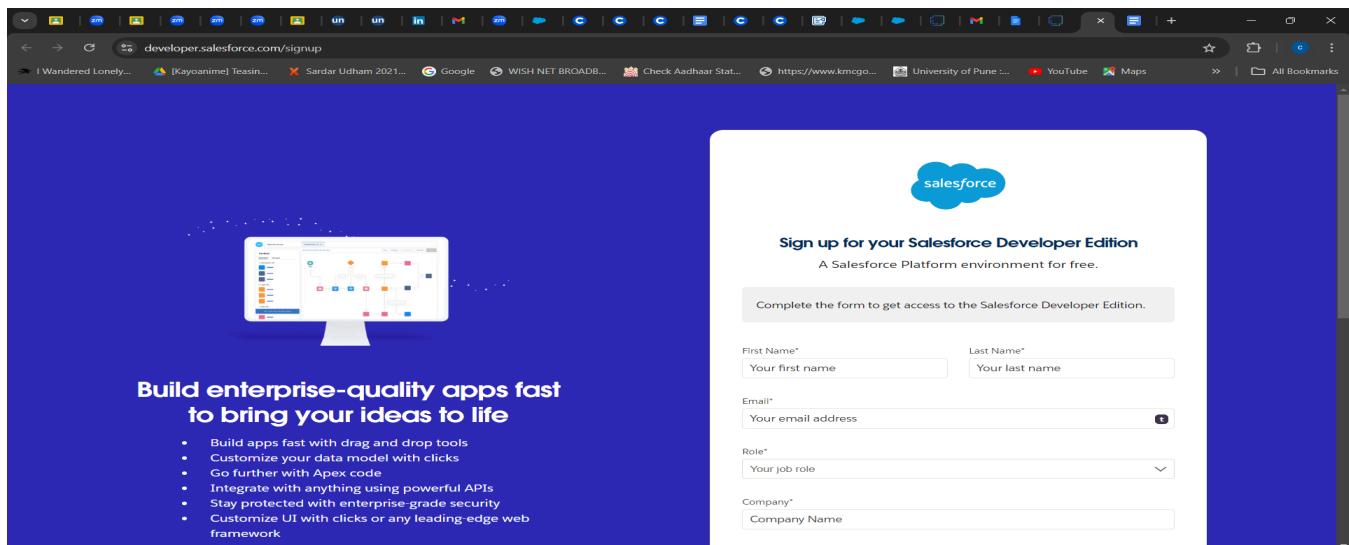
# INTRODUCTION

The Workforce Administration Solution is a state-of-the-art software application designed to streamline and automate the management of employee activities and asset assignments within organizations. This comprehensive platform serves as a centralized hub for efficiently handling employee data, tracking project engagements, monitoring performance metrics, and maintaining detailed records of assigned assets. By integrating these processes, the Workforce Administration Solution enhances operational efficiency, promotes optimal resource allocation, and provides valuable insights into workforce productivity and asset utilization. This solution aims to support organizational growth and operational excellence through improved workforce management and asset tracking capabilities.

## Salesforce

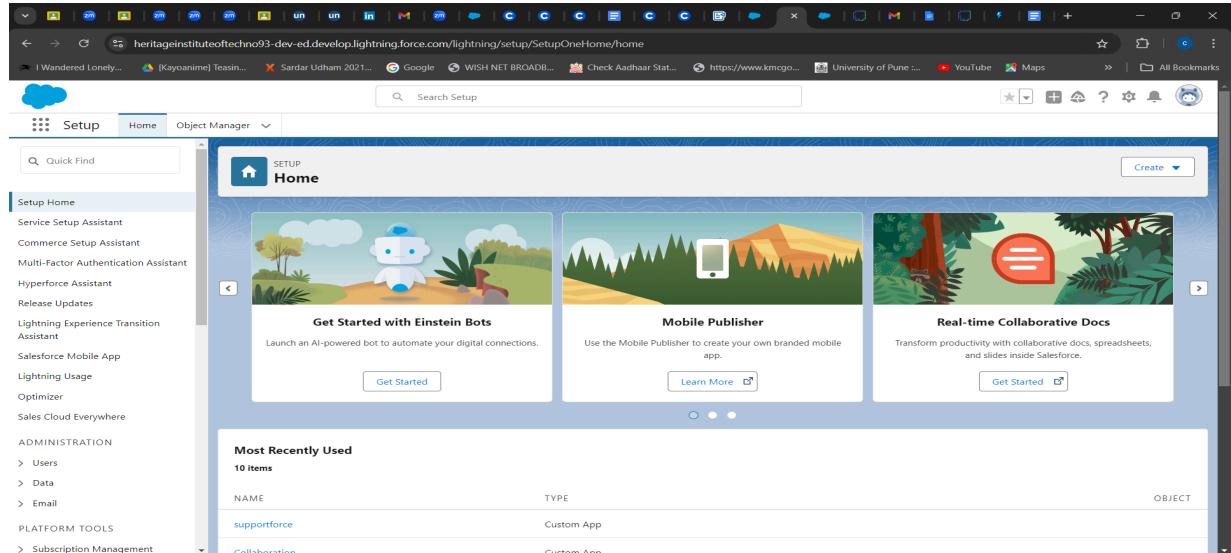
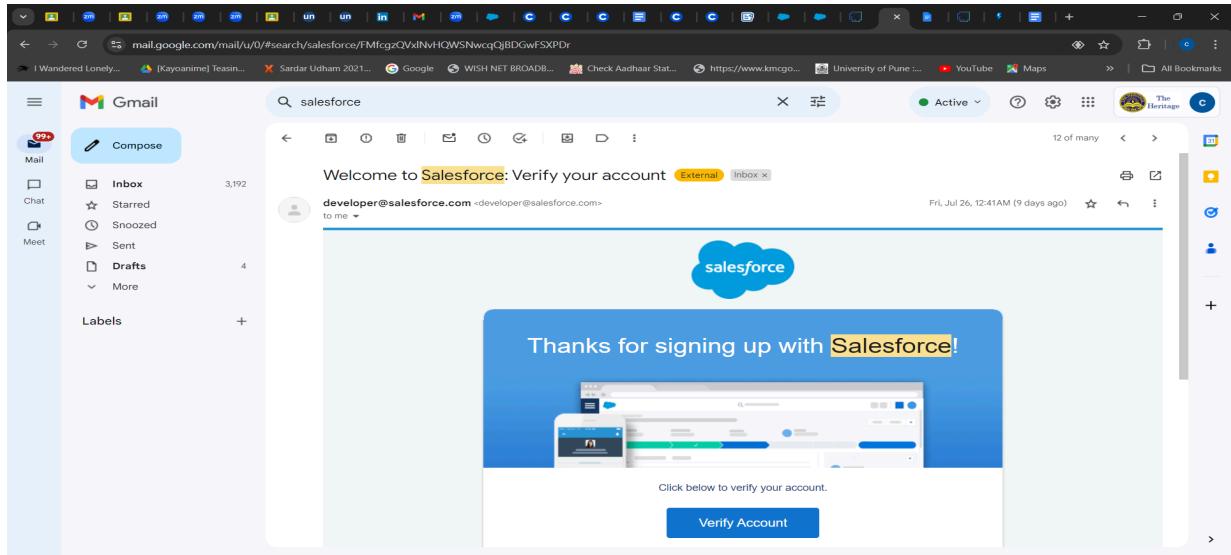
### TASK 1: Creating Developer Account

1. Go to <https://developer.salesforce.com/signup>
2. Fill up form with personal information



## TASK 2: Account Activation

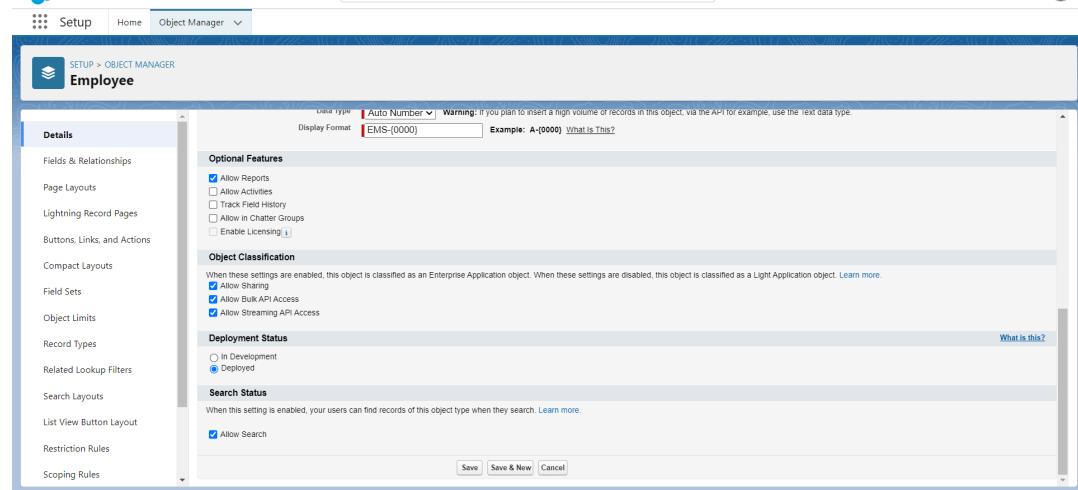
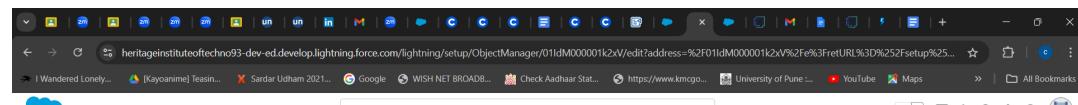
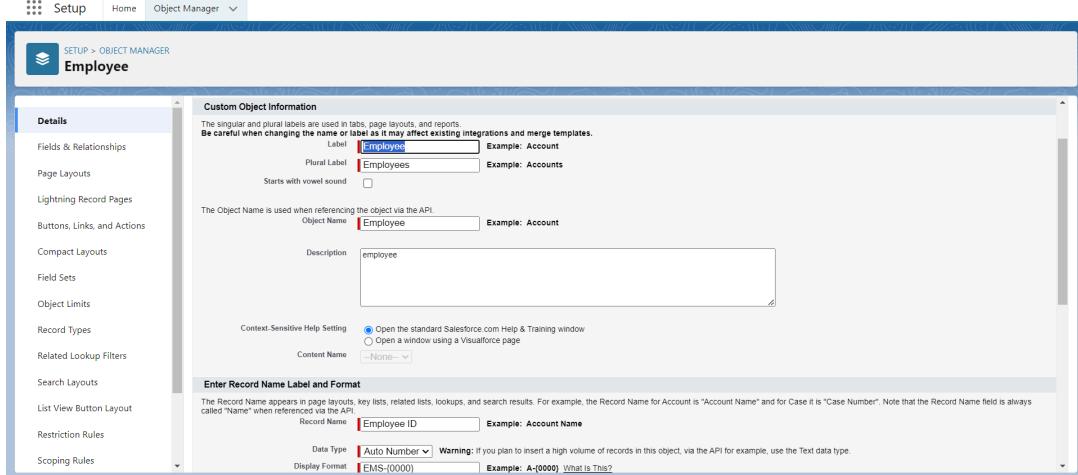
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.
2. Give a password and answer a security question and click on change password.
3. Then you will redirect to your salesforce setup page.



# Objects

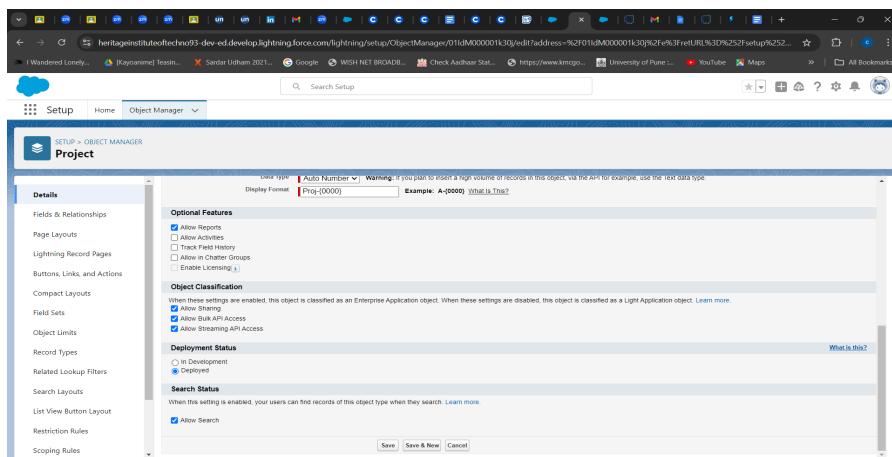
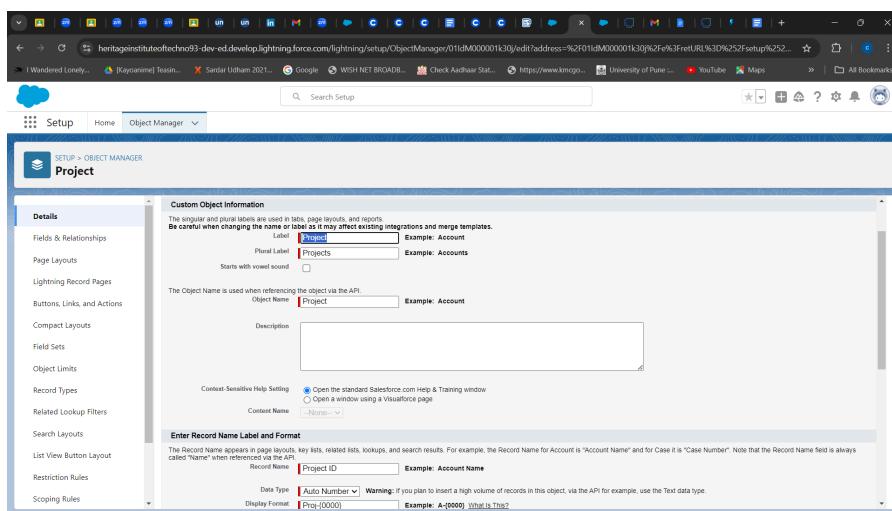
## TASK 3: Create Employee Object

1. From the setup page --> Click on Object Manager --> Click on Create --> Click on Custom Object.
2. Enter the label name: Employee and Plural label name: Employees
3. Enter Record Name Label and Format
4. Click on Allow reports,
5. Allow search --> Save.



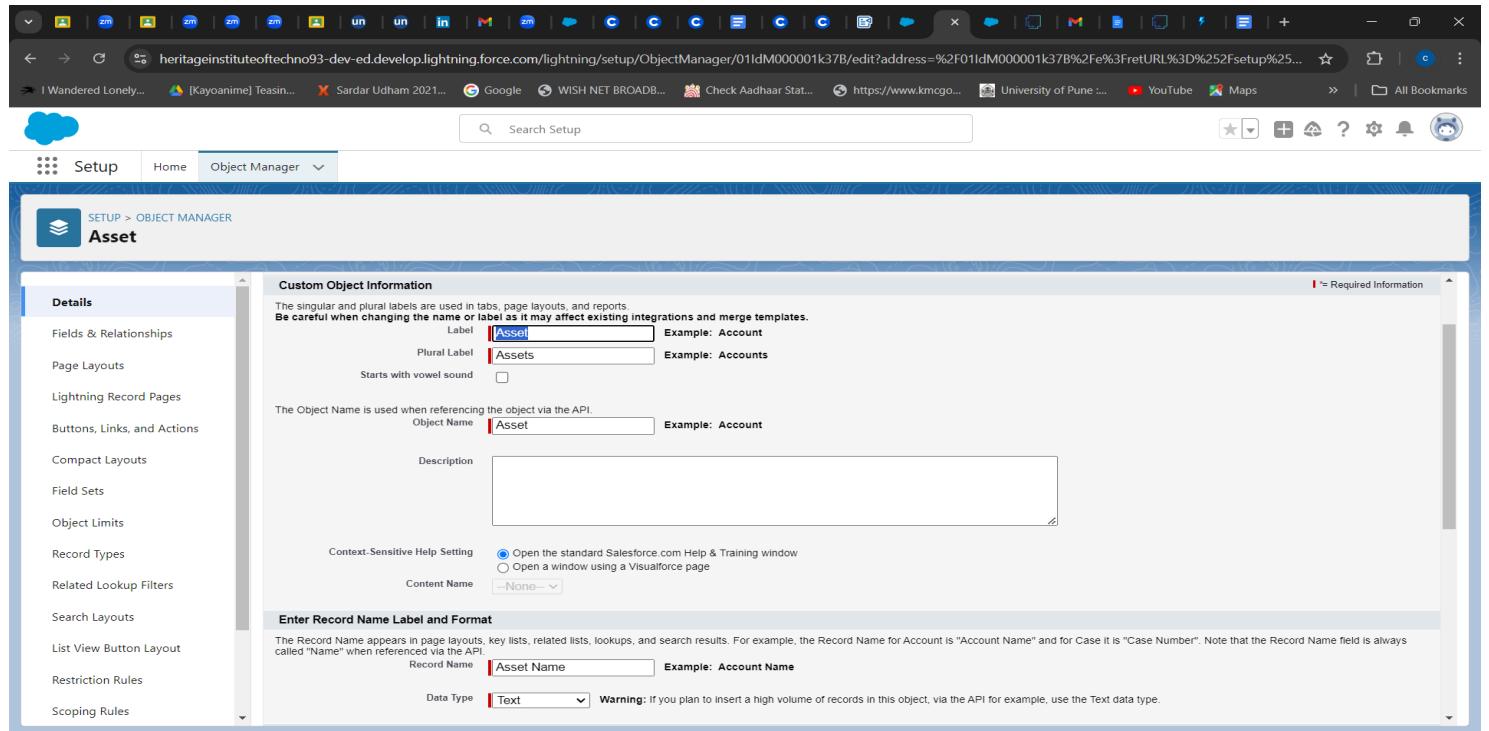
# TASK 4: Create Project Object

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



# TASK 5: Create ProjectTask, Asset, Asset Service Object

1. From the setup page --> Click on Object Manager --> Click on Create --> Click on Custom Object.
2. Enter the label name and the Plural label name.
3. Enter Record Name Label and Format
4. Allow search --> Save



The screenshot shows the Salesforce Setup interface for creating a new Custom Object. The object name is 'Asset'. The 'Record Name' is 'Asset' and the 'Data Type' is 'Text'. The 'Plural Label' is 'Assets'.

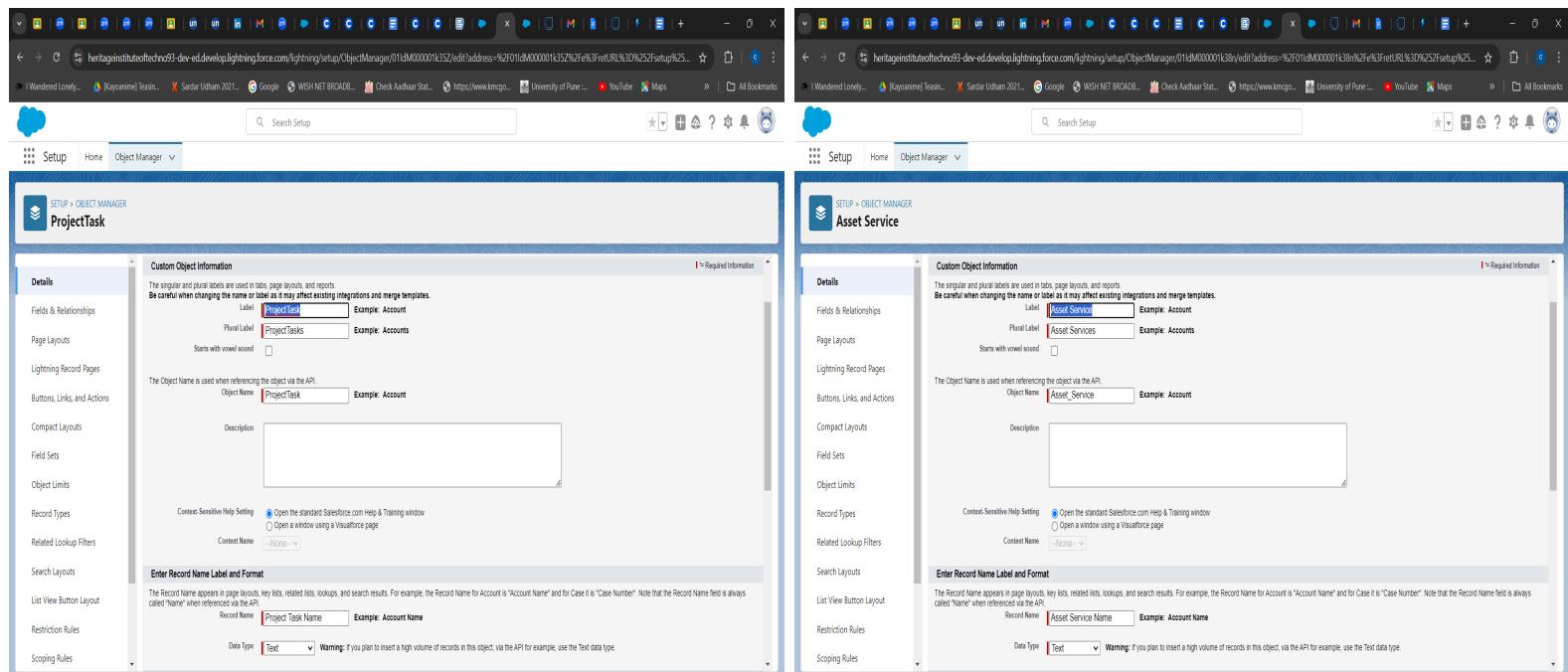
**Custom Object Information**

- Label: Asset (Example: Account)
- Plural Label: Assets (Example: Accounts)
- Starts with vowel sound:
- Object Name: Asset (Example: Account)
- Description: (Empty text area)
- Context-Sensitive Help Setting:  Open the standard Salesforce.com Help & Training window  Open a window using a Visualforce page
- Content Name:

**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 "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

- Record Name: Asset Name (Example: Account Name)
- Data Type: Text
- Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.



The screenshots show the Salesforce Setup interface for creating two new Custom Objects: 'ProjectTask' and 'Asset Service'.

**ProjectTask Object Information**

- Label: ProjectTask (Example: Account)
- Plural Label: ProjectTasks (Example: Accounts)
- Starts with vowel sound:
- Object Name: ProjectTask (Example: Account)
- Description: (Empty text area)
- Context-Sensitive Help Setting:  Open the standard Salesforce.com Help & Training window  Open a window using a Visualforce page
- Content Name:

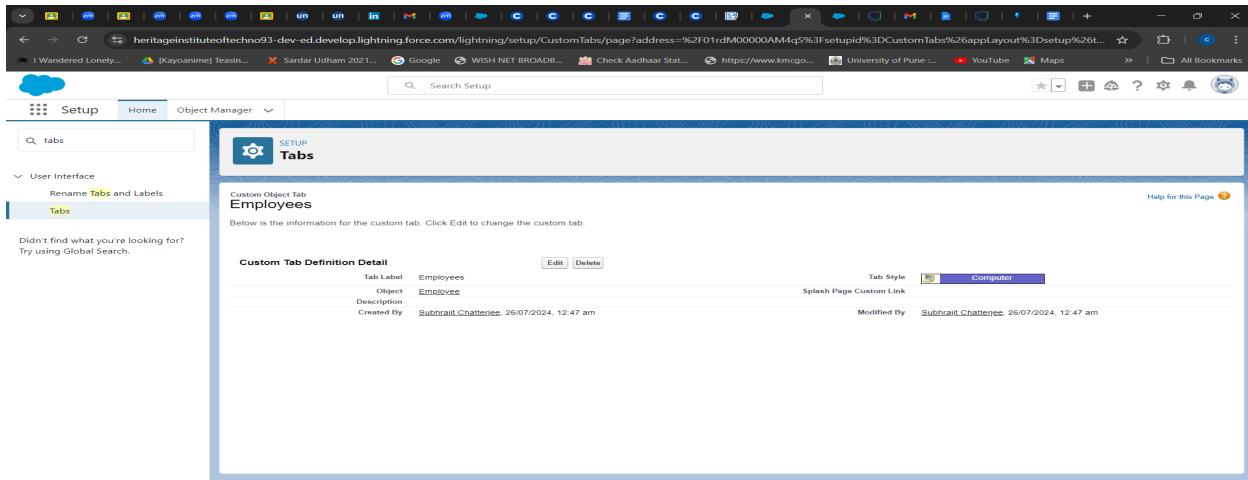
**Asset Service Object Information**

- Label: Asset Service (Example: Account)
- Plural Label: Asset Services (Example: Accounts)
- Starts with vowel sound:
- Object Name: Asset\_Service (Example: Account)
- Description: (Empty text area)
- Context-Sensitive Help Setting:  Open the standard Salesforce.com Help & Training window  Open a window using a Visualforce page
- Content Name:

# Tabs

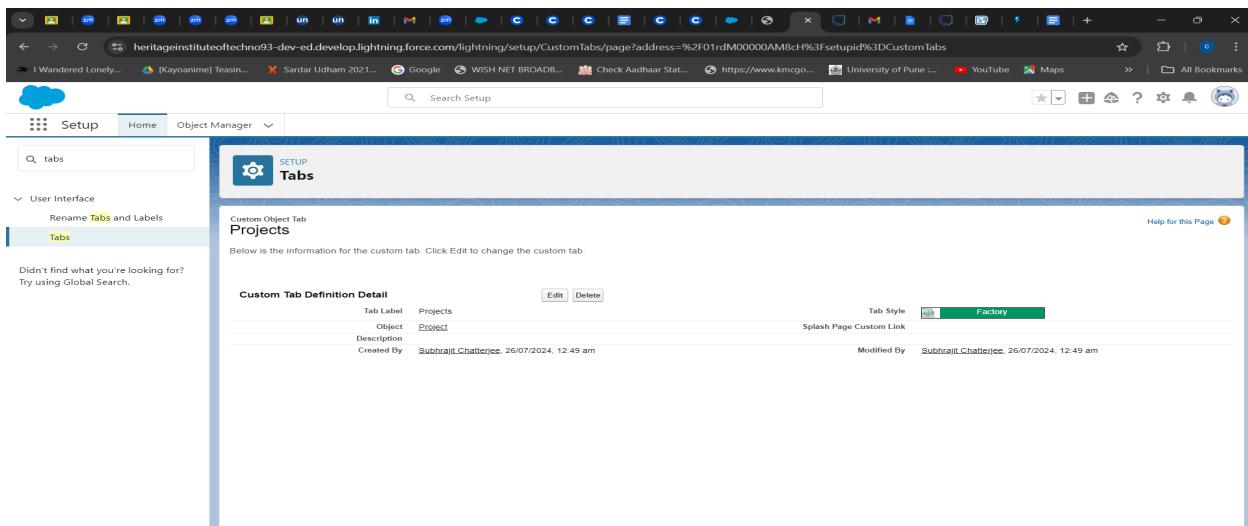
## TASK 6: Creating a Custom Tab (Employee)

1. Go to setup page --> type Tabs in Quick Find bar --> click on tabs --> New (under custom object tab )
2. Select Object(Employee) --> Select any tab style --> Next (Add to profiles page) keep it as default --> Next (Add to Custom App) keep it as default --> Save.



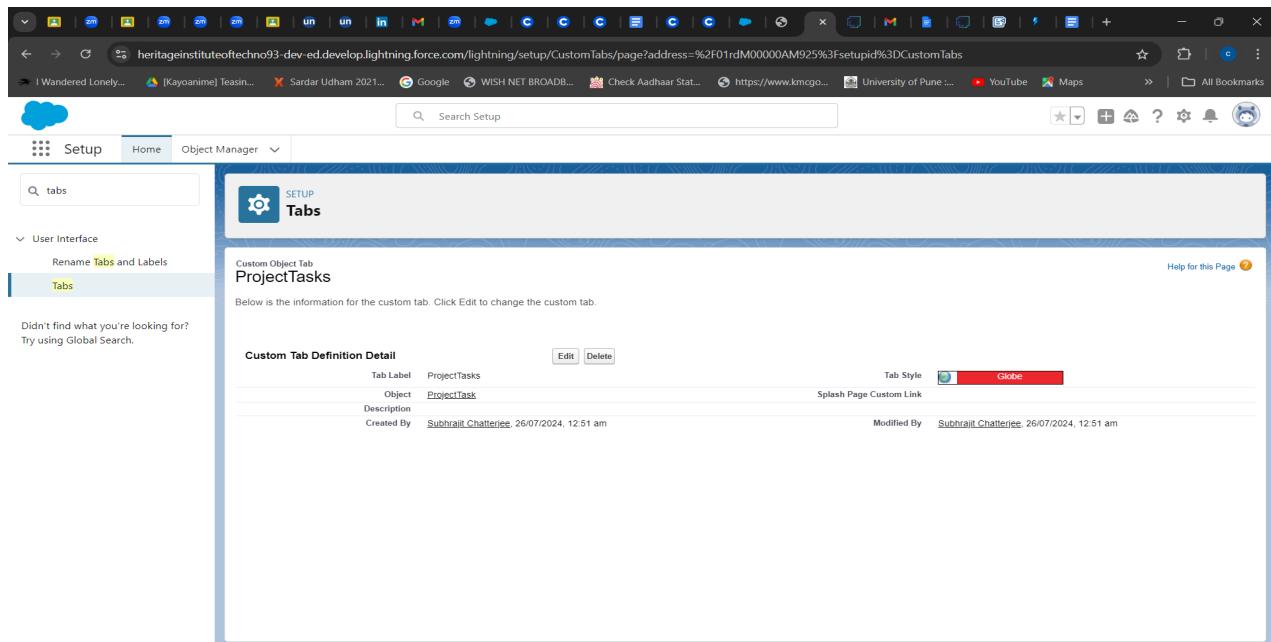
## TASK 7: Creating a Custom Tab (Project)

1. Go to setup page --> type Tabs in Quick Find bar --> click on tabs --> New (under custom object tab )
2. Select Object(Project) --> Select any tab style --> Next (Add to profiles page) keep it as default --> Next (Add to Custom App) keep it as default --> Save.



## TASK 8: Creating tabs for remaining objects

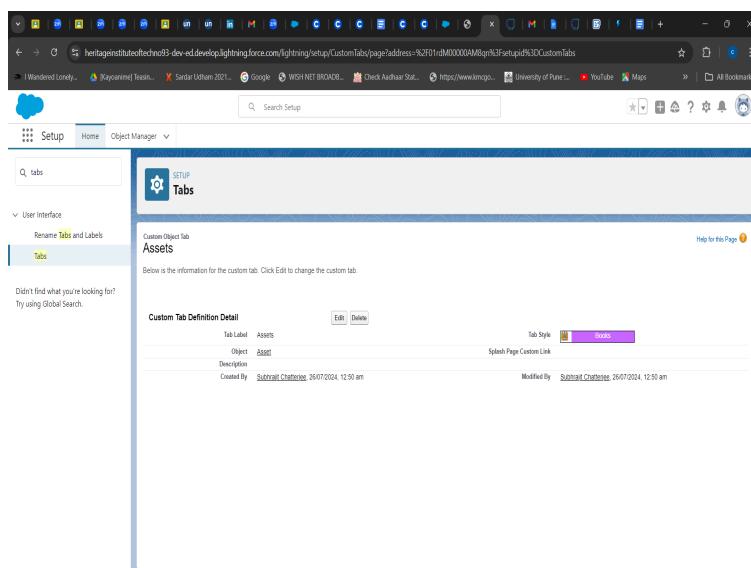
1. Go to setup page --> type Tabs in Quick Find bar --> click on tabs --> New (under custom object tab )
2. Select Object( Project Task) --> Select any tab style --> Next (Add to profiles page) keep it as default --> Next (Add to Custom App) keep it as default --> Save.
3. Repeat step 1 and 2 for Asset, Asset Service objects.



Custom Object Tab  
**ProjectTasks**

Below is the information for the custom tab. Click Edit to change the custom tab.

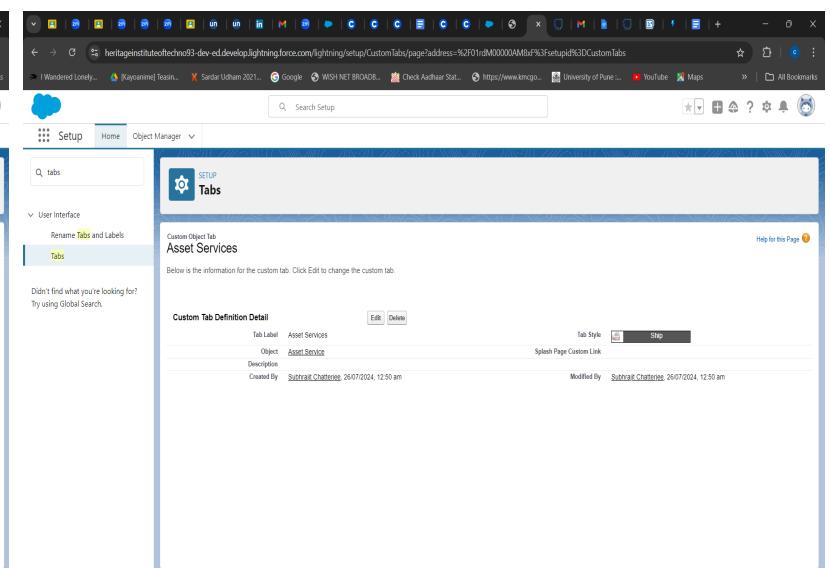
Custom Tab Definition Detail	Tab Label	Object	Tab Style	
	ProjectTasks	ProjectTask	Globe	
	Description		Splash Page Custom Link	
	Created By	Subhrail Chatterjee, 26/07/2024, 12:51 am	Modified By	Subhrail Chatterjee, 26/07/2024, 12:51 am



Custom Object Tab  
**Assets**

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail	Tab Label	Object	Tab Style	
	Assets	Asset	Basic	
	Description		Splash Page Custom Link	
	Created By	Subhrail Chatterjee, 26/07/2024, 12:50 am	Modified By	Subhrail Chatterjee, 26/07/2024, 12:50 am



Custom Object Tab  
**Asset Services**

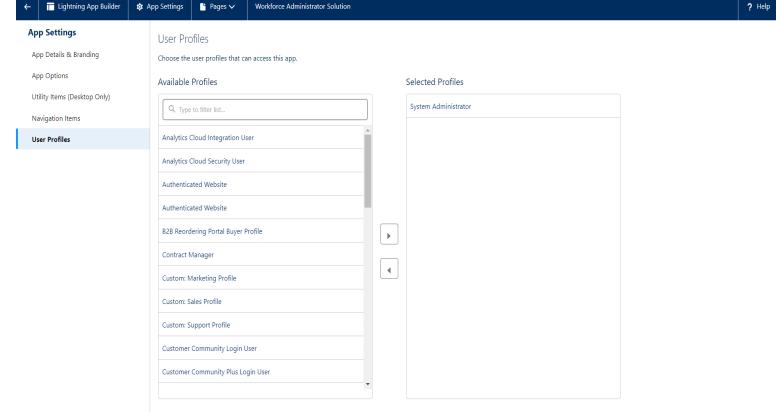
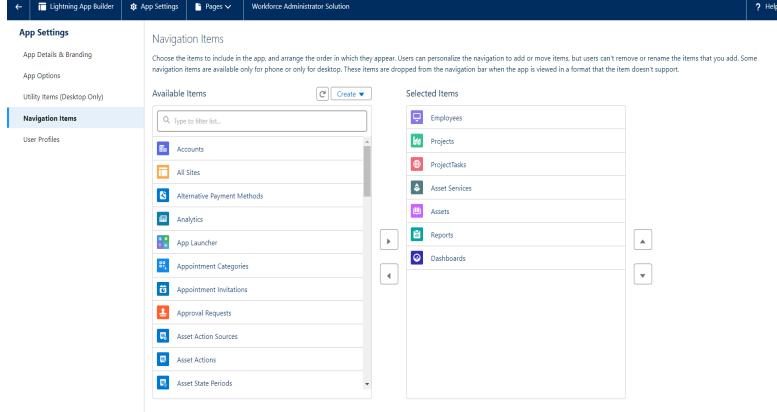
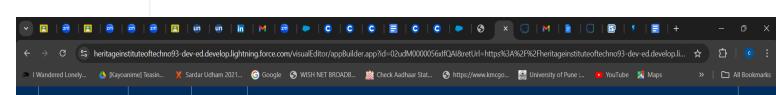
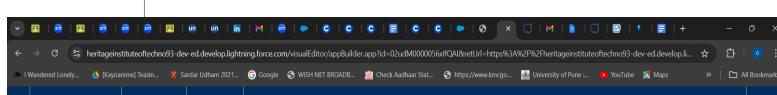
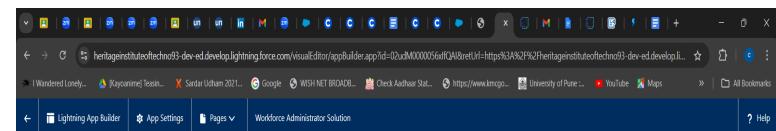
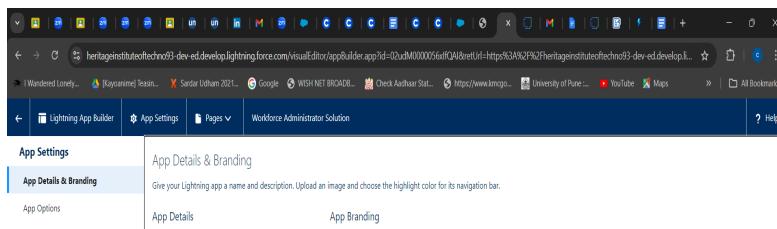
Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail	Tab Label	Object	Tab Style	
	Asset Services	Asset Service	Step	
	Description		Splash Page Custom Link	
	Created By	Subhrail Chatterjee, 26/07/2024, 12:50 am	Modified By	Subhrail Chatterjee, 26/07/2024, 12:50 am

# The Lightning App

## TASK 9: Create a Lightning App

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



# Fields & Relationships

## TASK 10: Creating Text Field in Employee Object

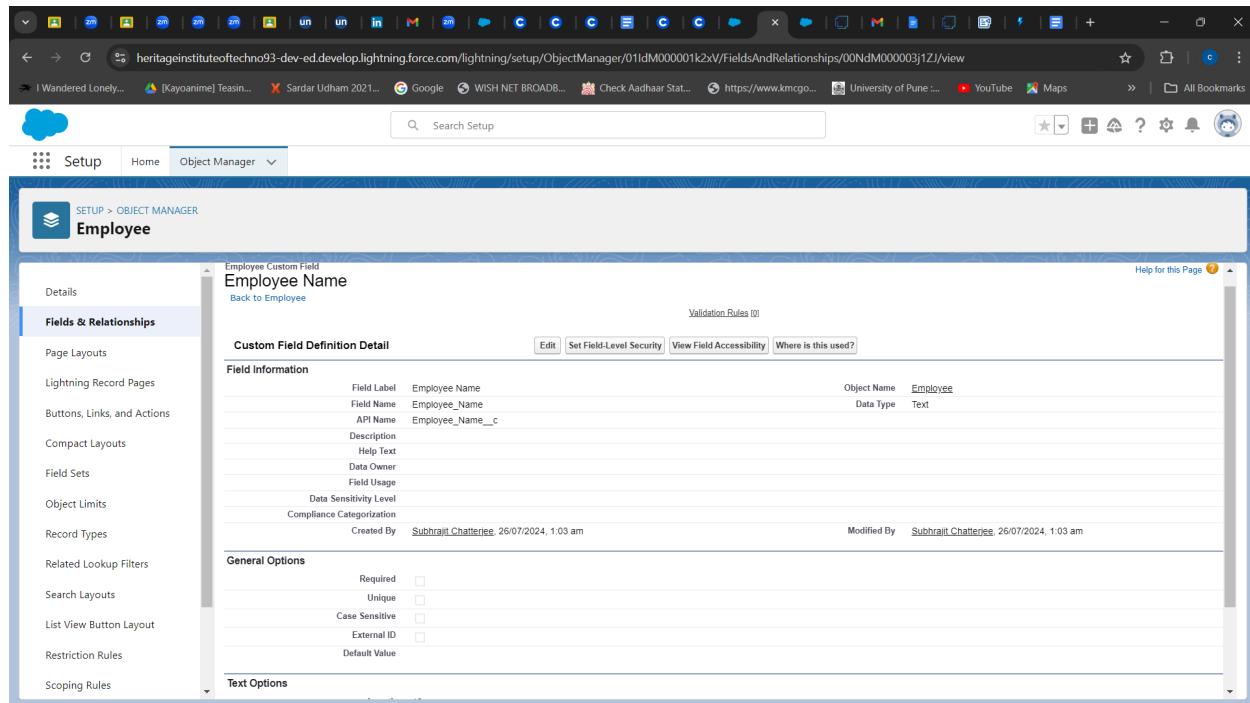
1. Go to setup --> click on Object Manager --> type object name(Employee) in quick find bar --> click on the object.
2. Now click on “Fields & Relationships” --> New
3. Select Data type as “Text”.
4. Click on Next
5. Fill the above as following:

Field Label: Employee Name

Length :18

Field Name : gets auto generated

Click on Next --> Next --> Save and new.



The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various object settings like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled 'Employee Custom Field' and shows the 'Employee Name' field configuration. The 'Field Information' section includes the field label 'Employee Name', field name 'Employee\_\_Name', API name 'Employee\_\_Name\_\_c', and data type 'Text'. The 'General Options' section includes checkboxes for 'Required', 'Unique', 'Case Sensitive', 'External ID', and 'Default Value'. The 'Text Options' section is partially visible at the bottom. The top of the page shows the browser's address bar with the URL 'heritageinstituteoftechno93-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01dM000001k2xV/FieldsAndRelationships/00NdM0000031ZJ/view'.

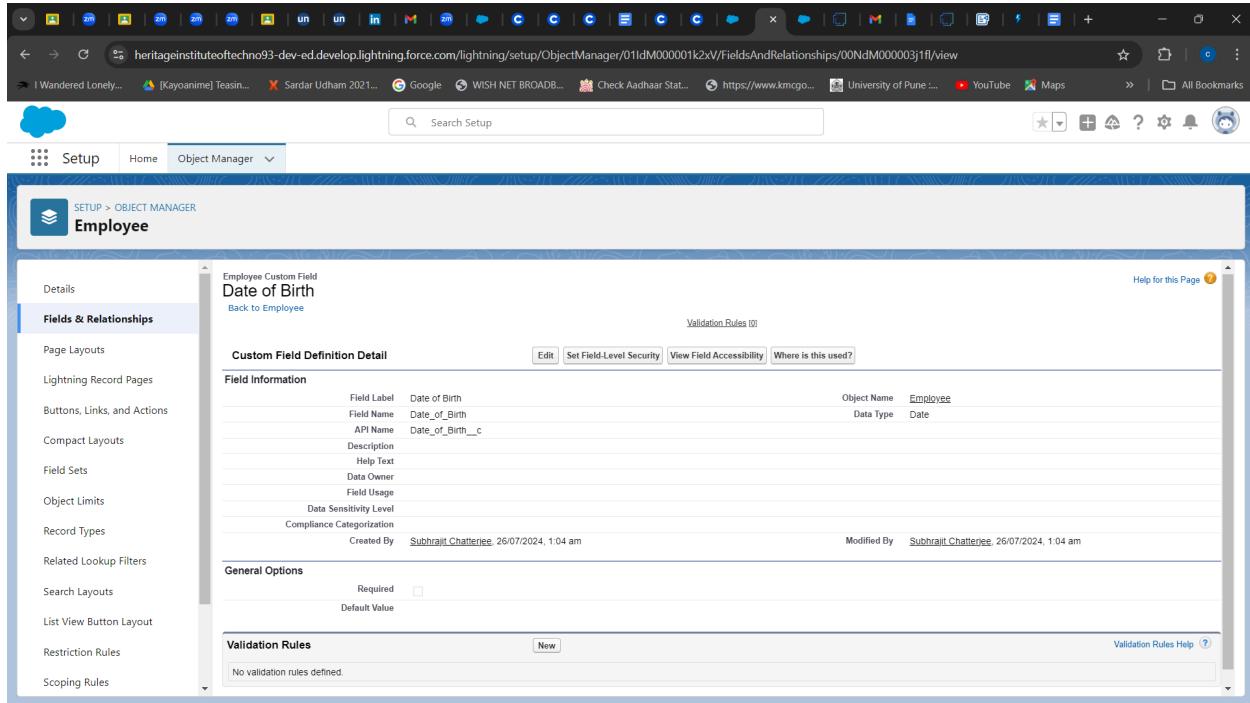
# TASK 11: Creating Date of Birth Field in Employee Object

1. Repeat step 1 and 2 mentioned in task 10
2. Select Data type as “Date” and click Next.
3. Click on Next.
4. Fill the above as following:

Field Label: Date of Birth.

Field Name : gets auto generated

Click on Next --> Next --> Save and new.



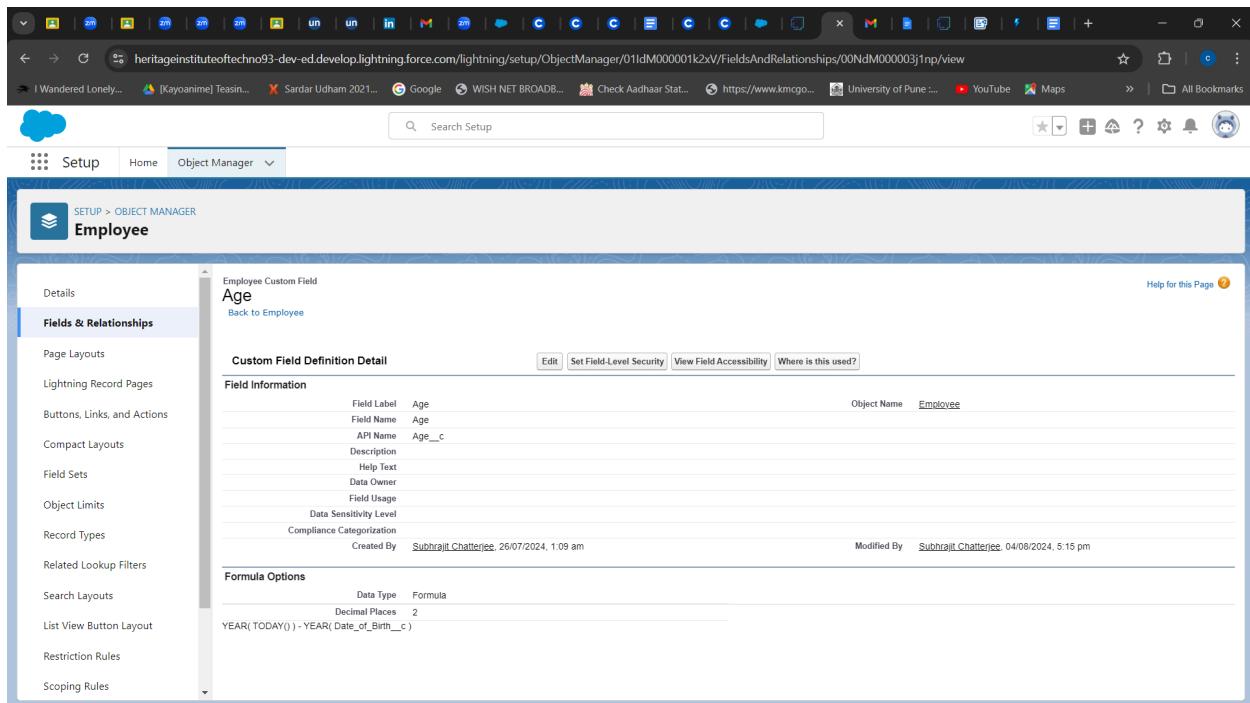
The screenshot shows the Salesforce Object Manager interface. The left sidebar is collapsed, and the main area displays the 'Employee' object. A sub-object 'Employee Custom Field' is selected, specifically the 'Date of Birth' field. The 'Custom Field Definition Detail' page is shown, with the 'Field Information' section containing the following details:

Field Label	Date of Birth	Object Name	Employee
Field Name	Date_of_Birth	Data Type	Date
API Name	Date_of_Birth__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Below this, the 'General Options' section shows 'Required' checked and 'Default Value' as an empty field. The 'Validation Rules' section indicates 'No validation rules defined'. The page includes standard Salesforce navigation buttons like 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The top of the page shows the URL as 'heritageinstituteoftechno93-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l0M000001k2xV/FieldsAndRelationships/00NdM000003j1fI/view'.

## TASK 12: Creating Formula Field in Employee Object

1. Repeat step 1 and 2 mentioned in task 10
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.
4. Write the formula - `YEAR(TODAY()) - YEAR(Date_of_Birth__c)` and click “Check Syntax” and Next --> Next --> Save & New.



The screenshot shows the Salesforce Object Manager interface. The left sidebar is collapsed, and the main area displays the 'Employee' object's custom field 'Age'. The 'Custom Field Definition Detail' section is open, showing the following details:

Field Information	Value
Field Label	Age
Field Name	Age
API Name	Age__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Subhrajit Chatterjee, 26/07/2024, 1:09 am
Modified By	Subhrajit Chatterjee, 04/08/2024, 5:15 pm

**Formula Options**

Data Type	Formula
Decimal Places	2
Formula	<code>YEAR(TODAY()) - YEAR(Date_of_Birth__c)</code>

# TASK 13: Creating Picklist Field in Employee Object

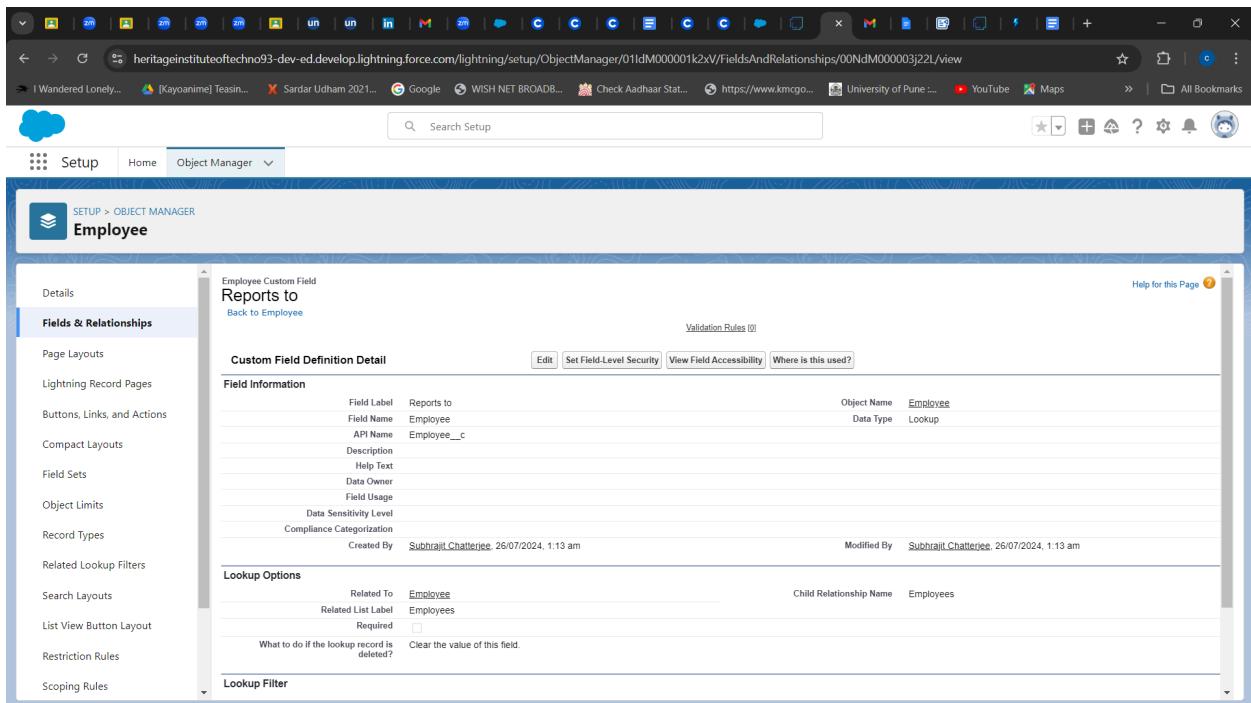
1. Repeat step 1 and 2 mentioned in task 10
2. Select Data type as “Picklist” and click Next
3. Enter Field Label as “Gender”, under values select “Enter values, with each value separated by a new line” and enter “male”, “female”
4. Click Next --> Next --> Next --> Save & New.

A screenshot of the Salesforce Object Manager. The top navigation bar shows 'SETUP &gt; OBJECT MANAGER' and the object is 'Employee'. The left sidebar has a 'Fields &amp; Relationships' tab selected. The main content area shows the creation of a custom field 'Gender'. The 'Field Information' section includes the field label 'Gender', field name 'Gender', API name 'Gender\_\_c', object name 'Employee', and data type 'Picklist'. The 'General Options' section shows 'Required' is unchecked and 'Default Value' is blank. The 'Picklist Options' section has a checked checkbox for 'Restrict picklist to the values defined in the value set' and 'Controlling Field' is set to [New].

A screenshot of the Salesforce Object Manager showing the 'Values' section for the 'Gender' picklist field. The table shows two entries: 'Male' and 'Female', both with 'Default' checked and 'Chart Colors' assigned dynamically, modified by Subhrajit Chatterjee on 26/07/2024, 1:12 am.

# TASK 14: Creating Self-Relationship Field in Employee Object

1. Repeat step 1 and 2 mentioned in task 10
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.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main content area is titled 'Employee Custom Field Reports to' under 'Employee'. The 'Fields & Relationships' tab is selected. The 'Custom Field Definition Detail' section shows the following details:

Field Label	Reports to	Object Name	Employee
Field Name	Employee	Data Type	Lookup
API Name	Employee__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Subhrail Chatterjee, 26/07/2024, 1:13 am	Modified By	Subhrail Chatterjee, 26/07/2024, 1:13 am

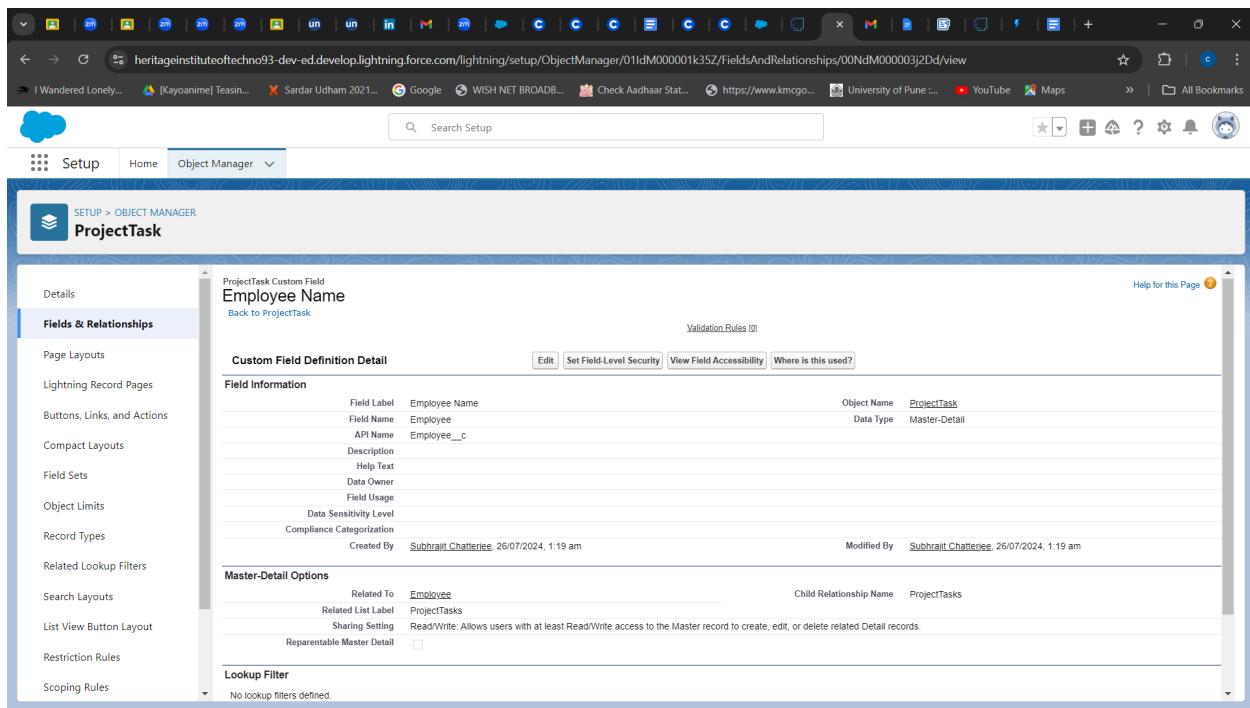
The 'Lookup Options' section shows:

Related To	Employee	Child Relationship Name	Employees
Related List Label	Employees		
Required	<input type="checkbox"/>		

At the bottom, there is a note: 'What to do if the lookup record is deleted?' with options 'Clear the value of this field.' and 'Delete the value of this field.'

# TASK 15: Creating Master-Detail Relationship between Employee & Asset Object

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.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a search bar and links for Setup, Home, and Object Manager. The main content area is titled 'ProjectTask Custom Field Employee Name' and shows the 'Fields & Relationships' tab selected. The 'Custom Field Definition Detail' section displays the following details:

Field Information	Value	Field Label	Employee Name	Object Name	ProjectTask
Field Name	Employee	Field Name	Employee	Data Type	Master-Detail
API Name	Employee__c	Description			
Help Text		Data Owner			
Field Usage		Field Usage			
Data Sensitivity Level		Data Sensitivity Level			
Compliance Categorization		Compliance Categorization			

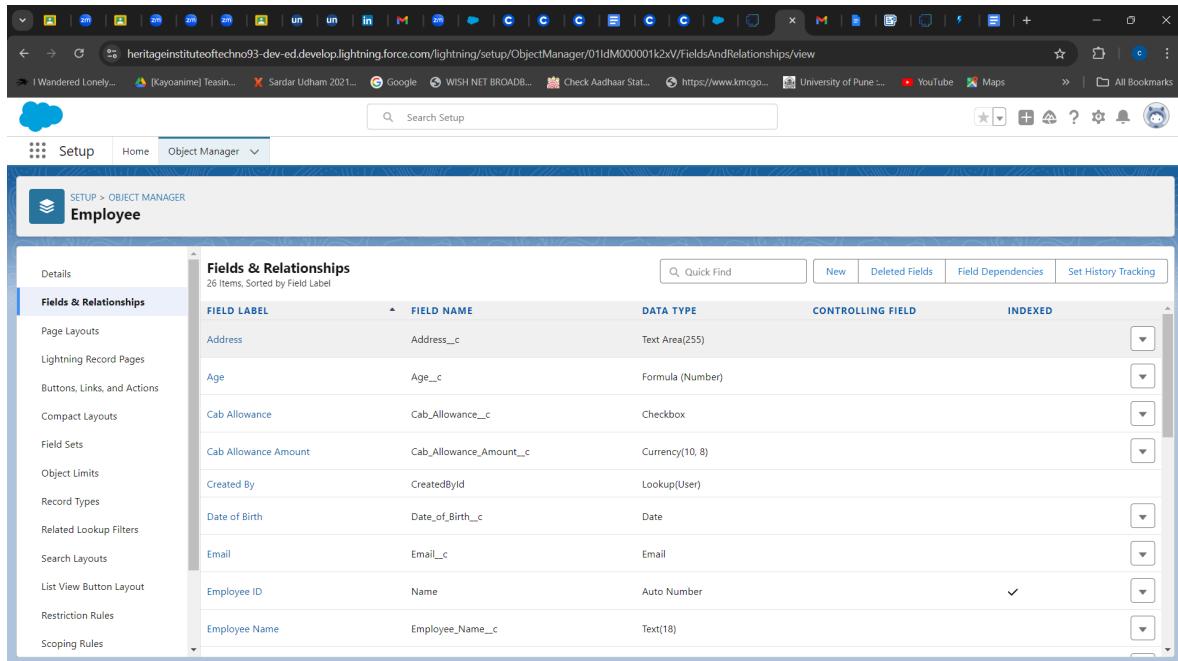
Below this, the 'Master-Detail Options' section shows:

Related To	Employee	Child Relationship Name	ProjectTasks
Related List Label	ProjectTasks		
Sharing Setting	ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Reparentable Master Detail			

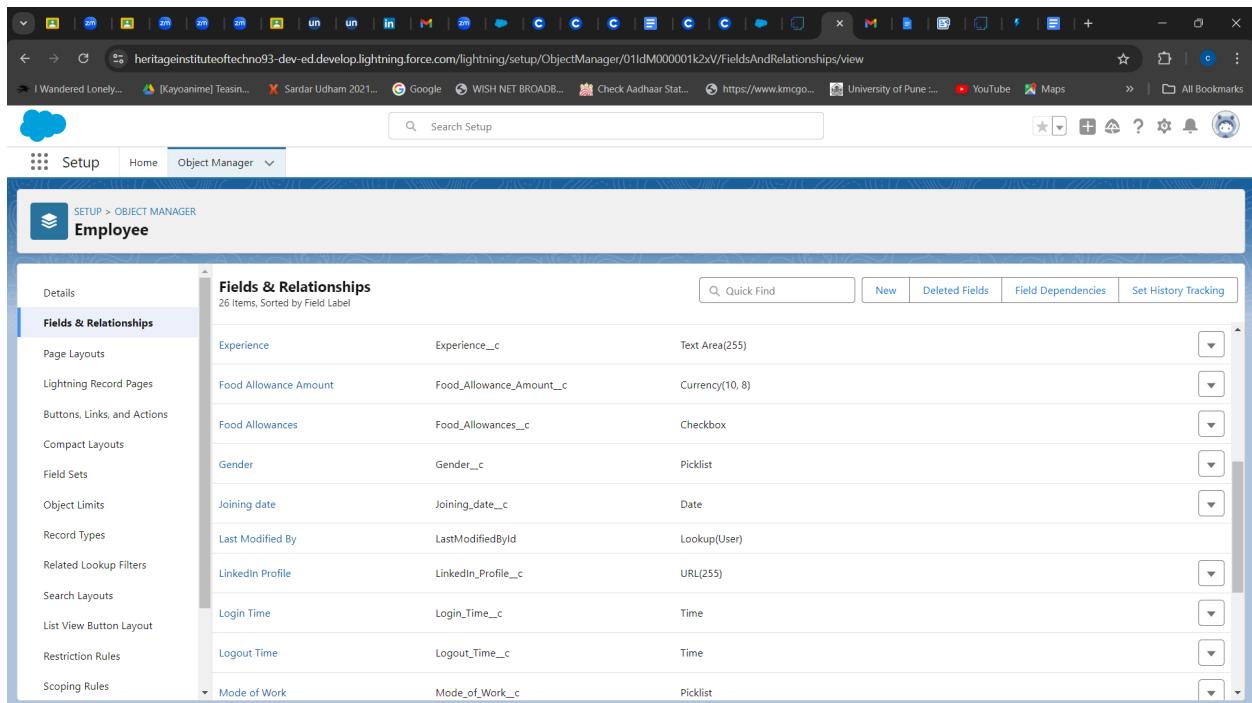
At the bottom, the 'Lookup Filter' section states: 'No lookup filters defined.'

# TASK 16: Creating Remaining Fields in Objects created

1. Now we create the useful fields that are going to be used in objects - Employee, Project, ProjectTask, Asset Service, Asset as per task 10 - 15.



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(10, 8)		
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)		



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Experience	Experience__c	Text Area(255)		
Food Allowance Amount	Food_Allowance_Amount__c	Currency(10, 8)		
Food Allowances	Food_Allowances__c	Checkbox		
Gender	Gender__c	Picklist		
Joining date	Joining_date__c	Date		
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		

heritageinstituteoftechno93-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IdM000001k35Z/FieldsAndRelationships/view

Setup Home Object Manager

ProjectTask

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Employee Name	Employee__c	Master-Detail(Employee)		✓
Finishes in	Finishes_in__c	Formula (Number)		
Last Modified By	LastModifiedById	Lookup(User)		
Project Task	Project_Task__c	Master-Detail(Project)		✓
Project Task Name	Name	Text(80)		✓
Working Hours	Working_Hours__c	Number(10, 8)		

heritageinstituteoftechno93-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IdM000001k30J/FieldsAndRelationships/view

Setup Home Object Manager

Project

Fields & Relationships

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(30)		
Project Name	Project_Name__c	Text(30)		
Project Status	Project_Status__c	Picklist		
Start Date	Start_Date__c	Date		

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Setup Home Object Manager

Asset

Fields & Relationships

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)		▼
Date Of Issue	Date_of_Issue__c	Formula (Date)		▼
Employee Name	Employee_Name__c	Lookup(Employee)		✓
Last Modified By	LastModifiedById	Lookup(User)		▼
Model Name	Model_Name__c	Text(90)		▼
Owner	OwnerId	Lookup(User,Group)		✓

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Setup Home Object Manager

Asset Service

Fields & Relationships

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(30)		▼
Type	Type__c	Picklist		▼

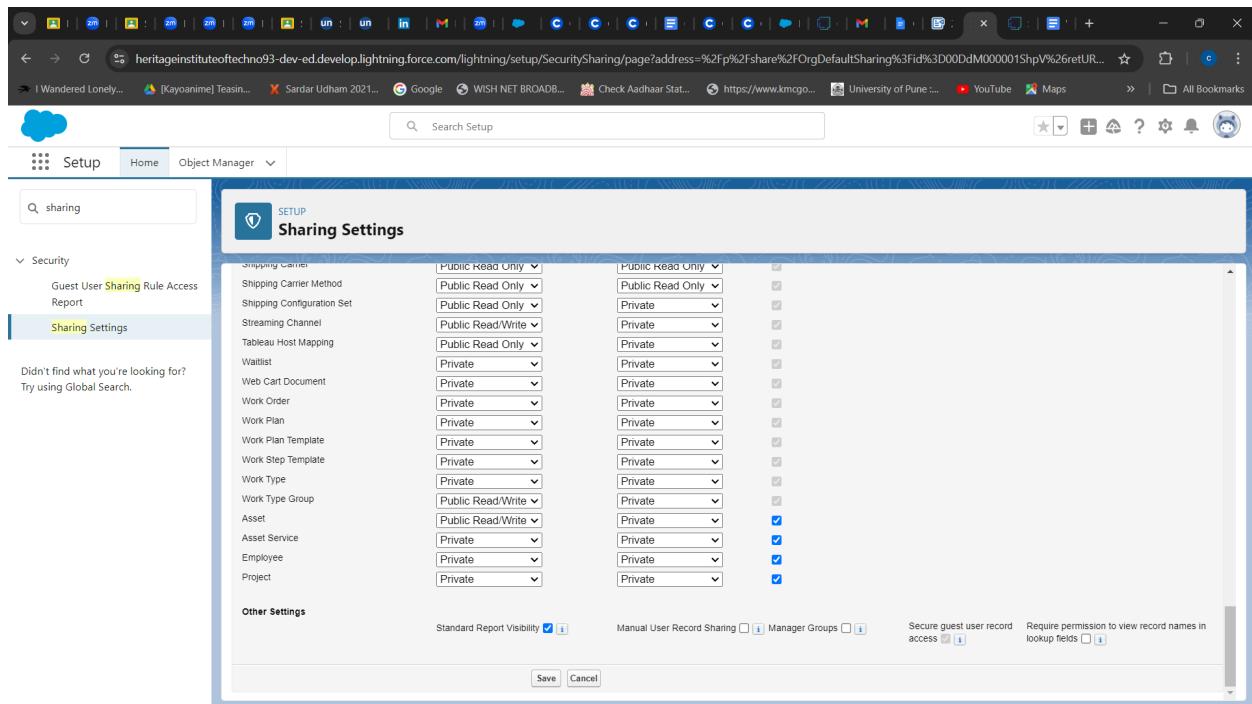
## ***Setting OWD***

### **TASK 17: 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.
6. This Setting is for all the Users Which have been Created.

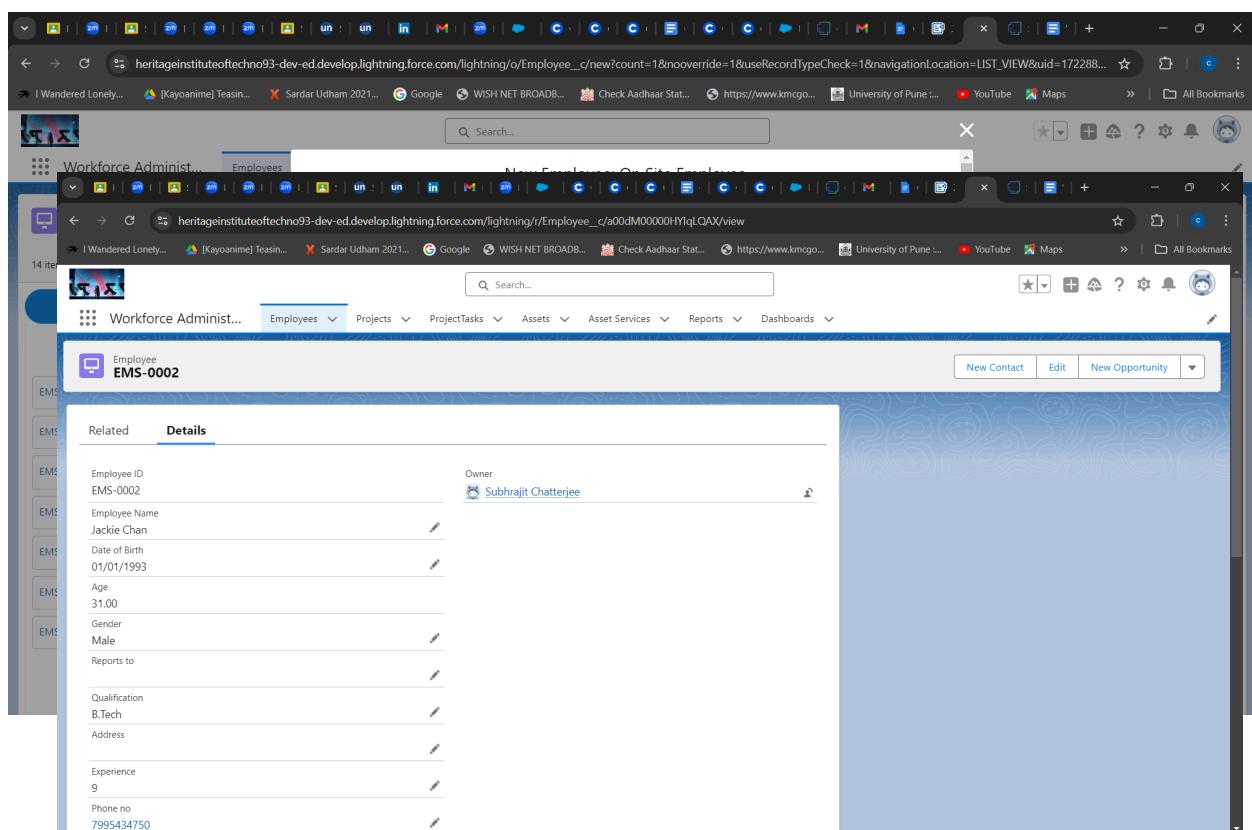
## TASK 18: Set OWD Setting (Project and Asset Service)

1. We set OWD as Private for Project and Asset Service objects.



The screenshot shows the Salesforce Sharing Settings page. The page title is "Sharing Settings". The left sidebar lists objects: Shipping Carrier, Guest User Sharing Rule Access Report, Shipping Carrier Method, Shipping Configuration Set, Streaming Channel, Tableau Host Mapping, Waitlist, Web Cart Document, Work Order, Work Plan, Work Plan Template, Work Step Template, Work Type, Work Type Group, Asset, Asset Service, Employee, and Project. The "Asset Service" object is selected. The main table shows the Object API Name, Current Sharing Rule, and New Sharing Rule. For "Asset Service", the current rule is "Public Read/Write" and the new rule is "Private", with a checkmark indicating it has been changed. Other objects like "Asset" and "Employee" also have "Private" selected. At the bottom, there are "Other Settings" and checkboxes for "Standard Report Visibility", "Manual User Record Sharing", "Manager Groups", "Secure guest user record access", and "Require permission to view record names in lookup fields".

5. Fill the Details and click on Save.



## TASK 20: View a Record (Employee)

1. Click on App Launcher on the left side of the screen.
2. Search **Workforce Administration Solution** & click on it.
3. Click on the Employee Tab.
4. Click on any record name. you can see the details of the Employee

## **TASK 21: Delete a Record (Employee)**

1. Click on App Launcher on the left side of the screen.
2. Search **Workforce Administration Solution** & click on it.
3. Click on the Employee Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete.

14 items • Sorted by Employee ID • Updated a few seconds ago

On Site (7) > Remote (7)

182

174

EMS-002  
EMS-005  
EMS-006  
EMS-007  
EMS-011  
EMS-012  
EMS-015

EMS-003  
EMS-004  
EMS-008  
EMS-009  
EMS-010  
EMS-013  
EMS-014

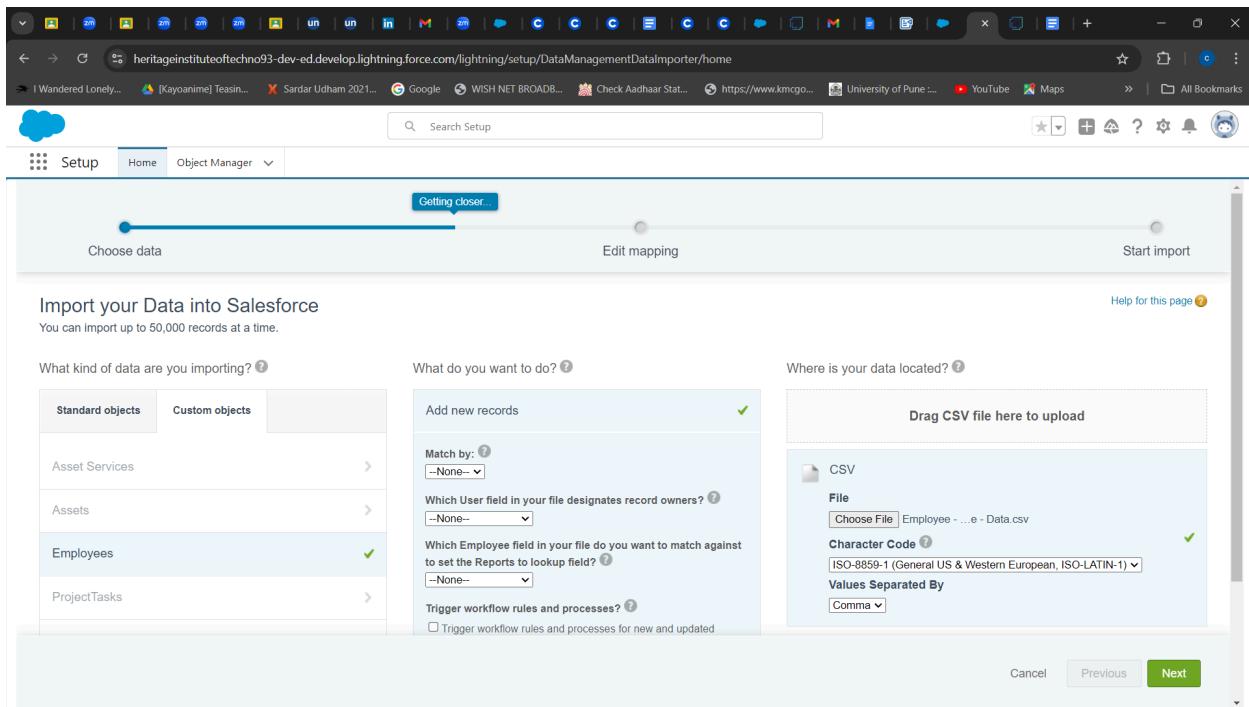
EMS-003

Edit  
Delete  
Change Owner  
Edit Labels

## Import Data

### TASK 22: Importing data using Data Wizard

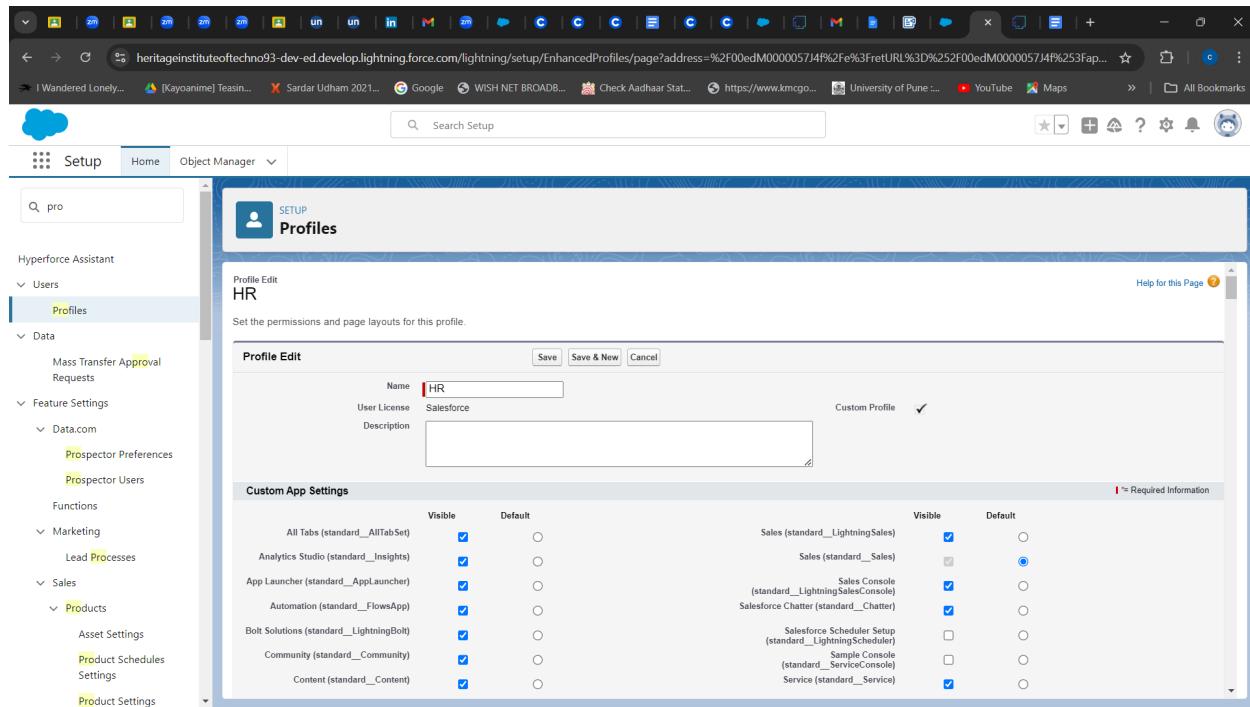
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.
3. Click Launch Wizard!
4. Click the Custom Objects tab and select the Employee object.
5. Select Add new records.
6. Click CSV and choose file Employee\_CSV which we made earlier. Click Next.
7. Since the field names in the CSV file (CSV Header) are the same as the field names in our object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.
8. The next screen gives us a summary of our data import. Click Start Import.
9. Click OK on the popup.
10. Scroll down the page and verify that our data has been imported under batches.
11. Make sure we have 0 records under the records failed column.



## Profiles

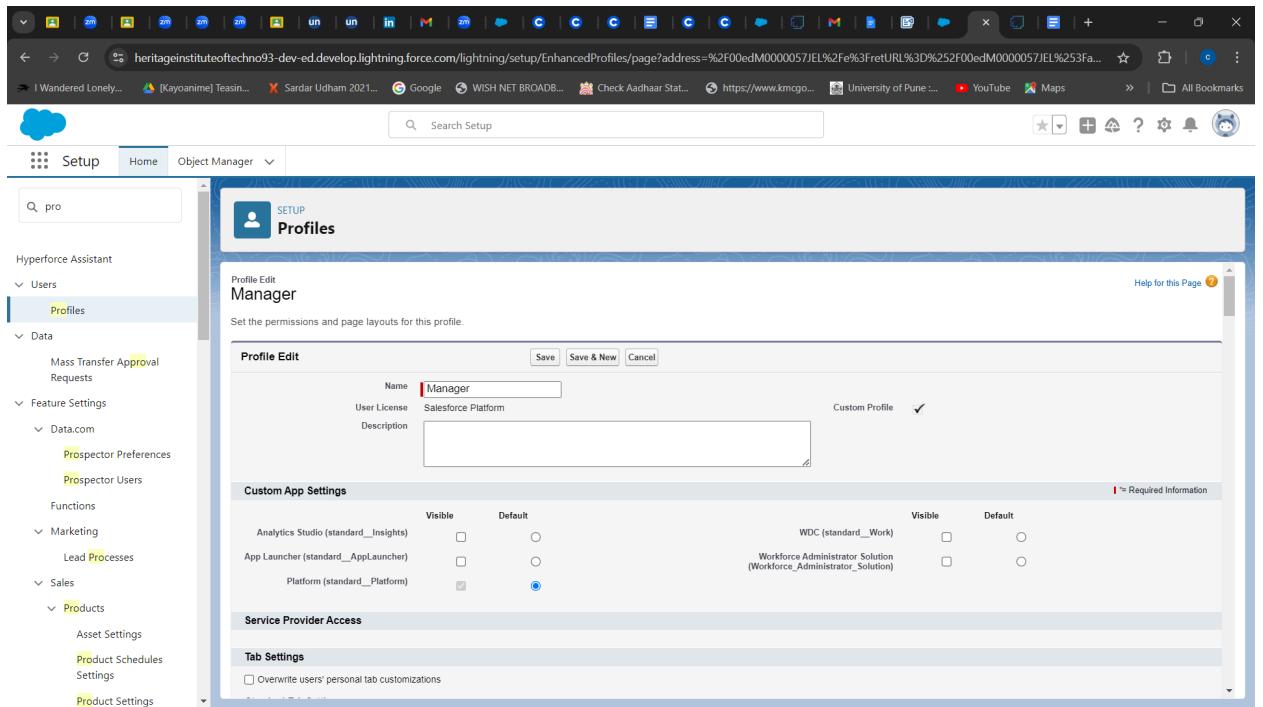
### TASK 23: HR Profile

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.



## TASK 24: Manager Profile

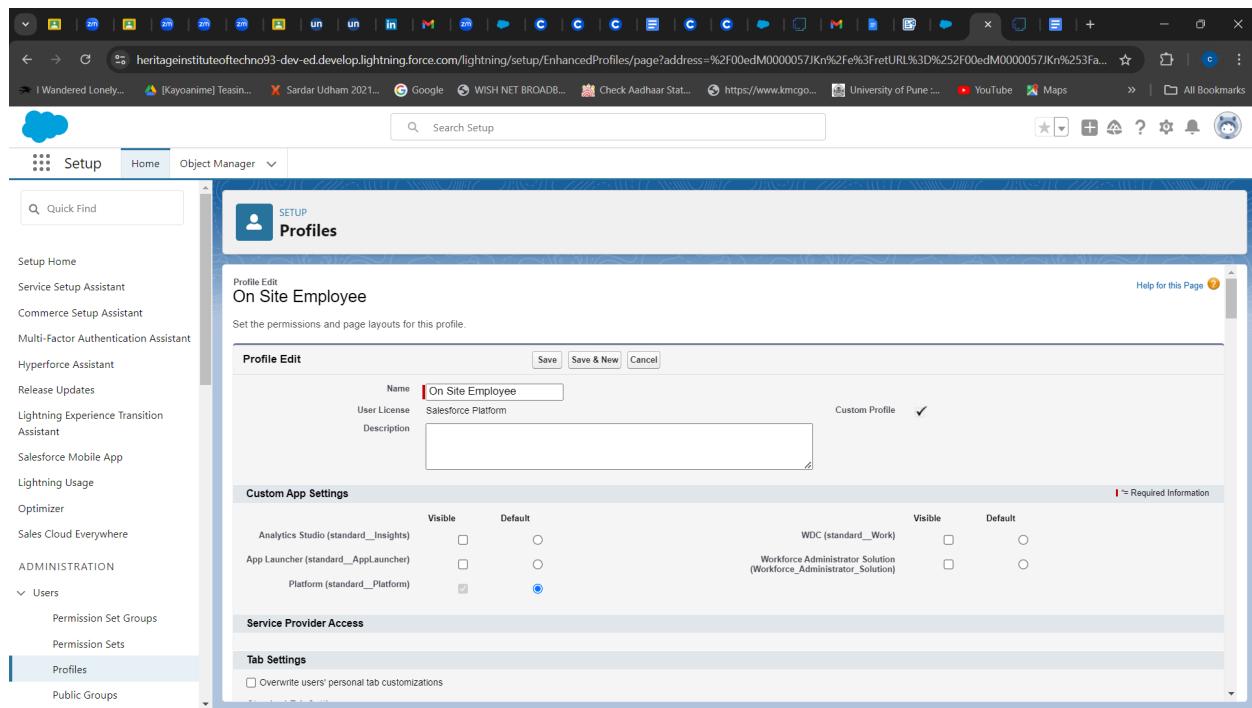
1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (Salesforce Platform User) --> enter profile name (Manager) --> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Employee, Project and Project Task objects.
4. Scroll down and Click on Save.



## TASK 25: On Site Employee Profile

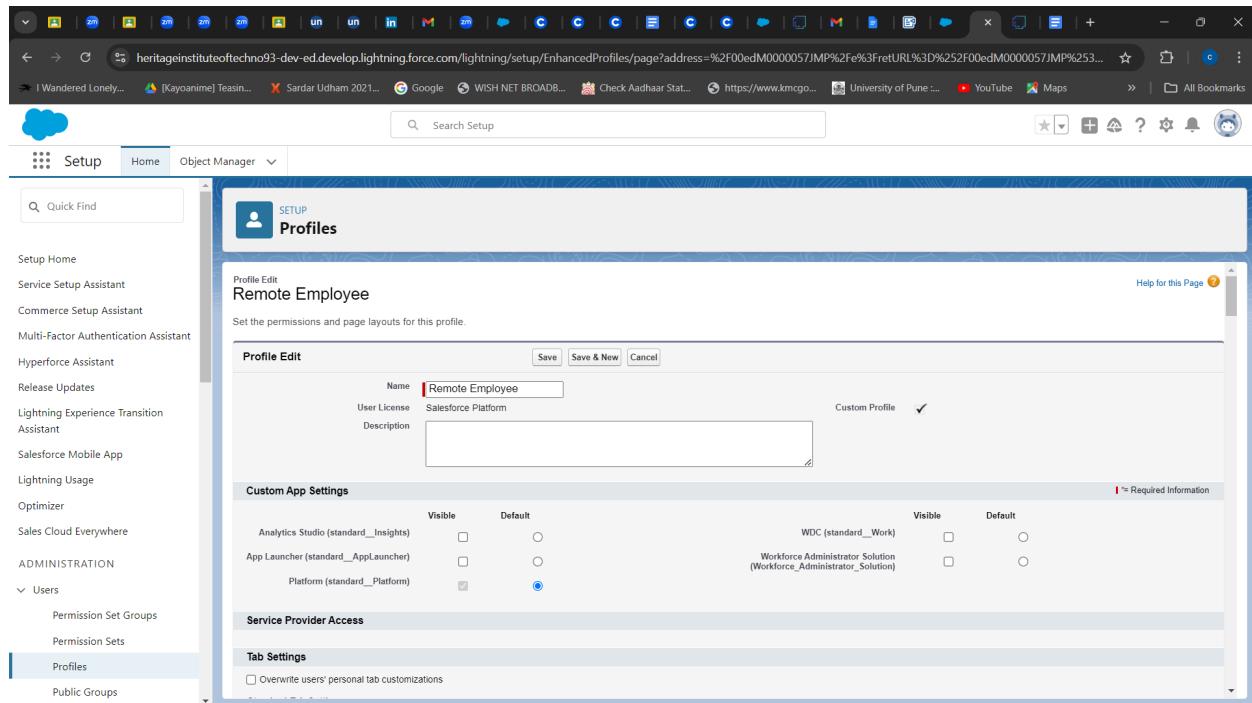
1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (Salesforce Platform User) --> enter profile name (On Site Employee) --> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Project and Project Task objects.

4. Scroll down and Click on Save.



## TASK 26: Remote Employee Profile

1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (Salesforce Platform User) --> enter profile name (Remote Employee) --> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Project and Project Task objects.
4. Scroll down and Click on Save.



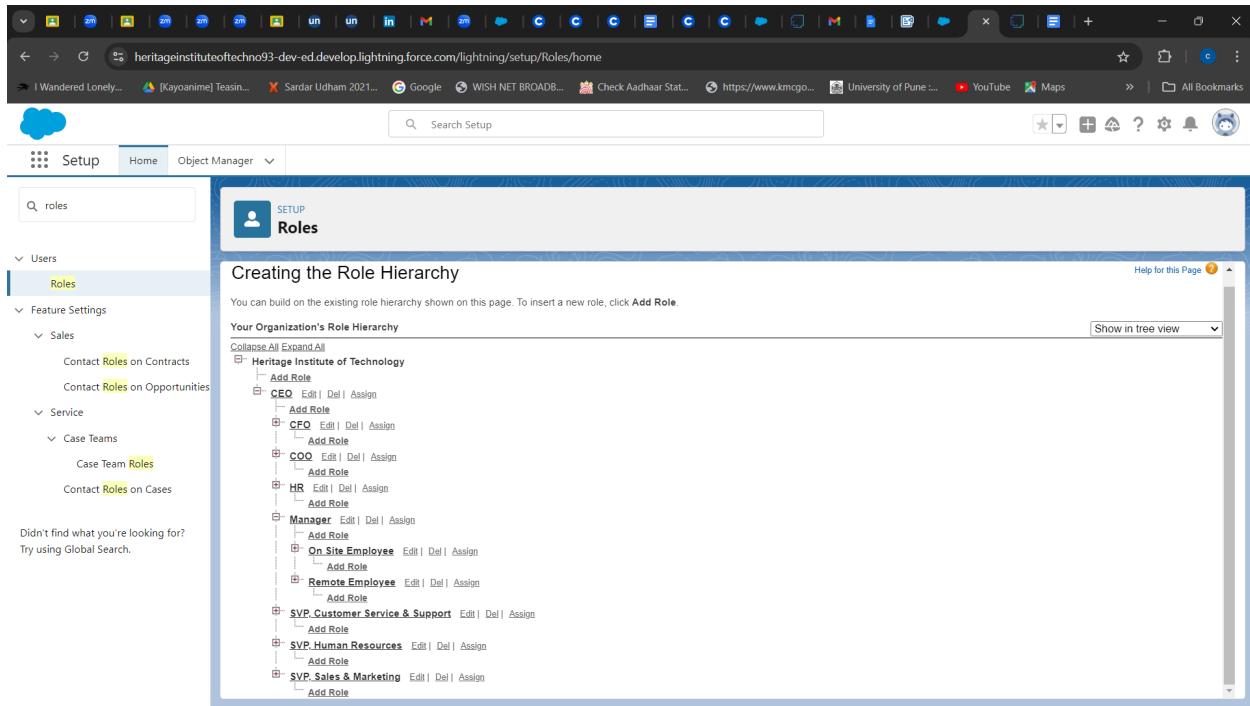
## Role

### TASK 27: 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 which is CEO. Then click on Save.

## TASK 28: Creating more roles

1. We create roles for Manager, On Site Employee, Remote Employee according to task 27.

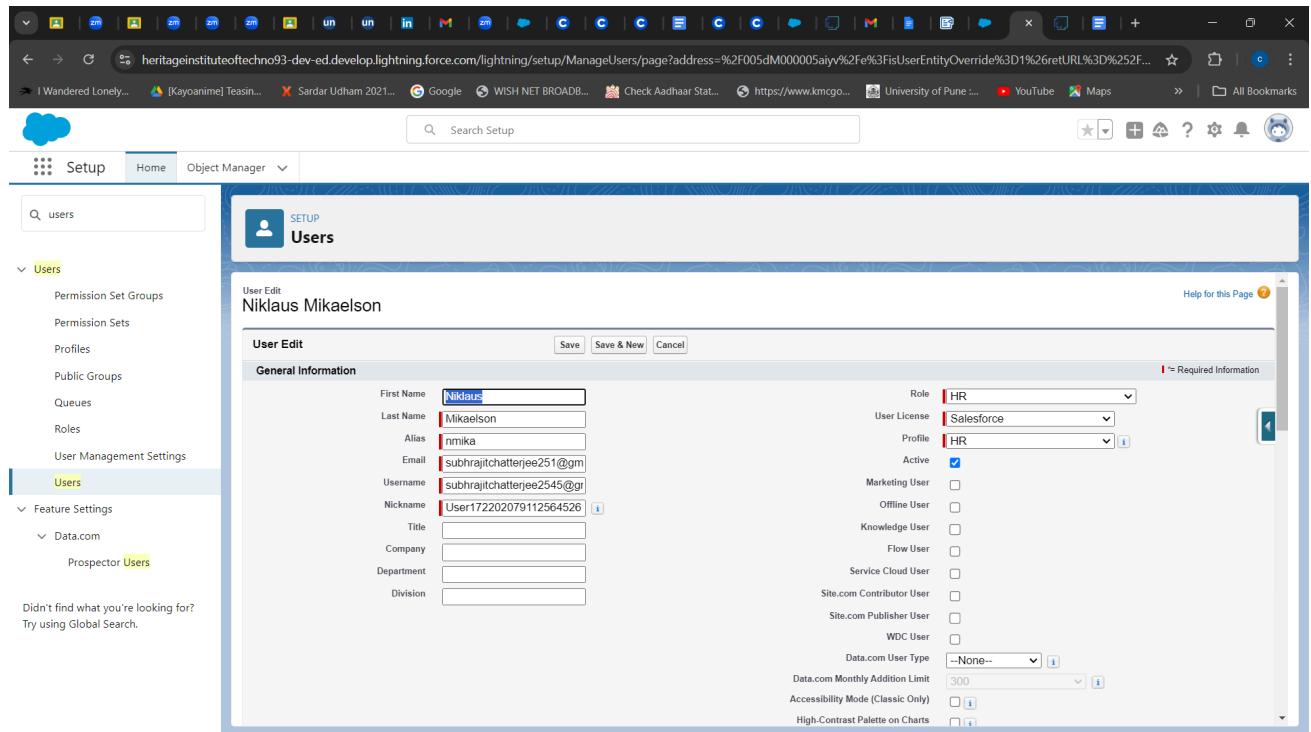


The screenshot shows the Salesforce Setup Roles page. The left sidebar is collapsed, and the main area is titled 'Creating the Role Hierarchy'. It displays a hierarchical tree of roles under 'Your Organization's Role Hierarchy'. The tree starts with 'Heritage Institute of Technology' at the root, which branches into 'CEO', 'CFO', 'COO', 'HR', and 'Manager'. 'CEO' further branches into 'On Site Employee' and 'Remote Employee'. Each role node has 'Edit | Del | Assign' buttons. A search bar at the top is empty, and a help link 'Help for this Page' is visible in the top right.

## Users

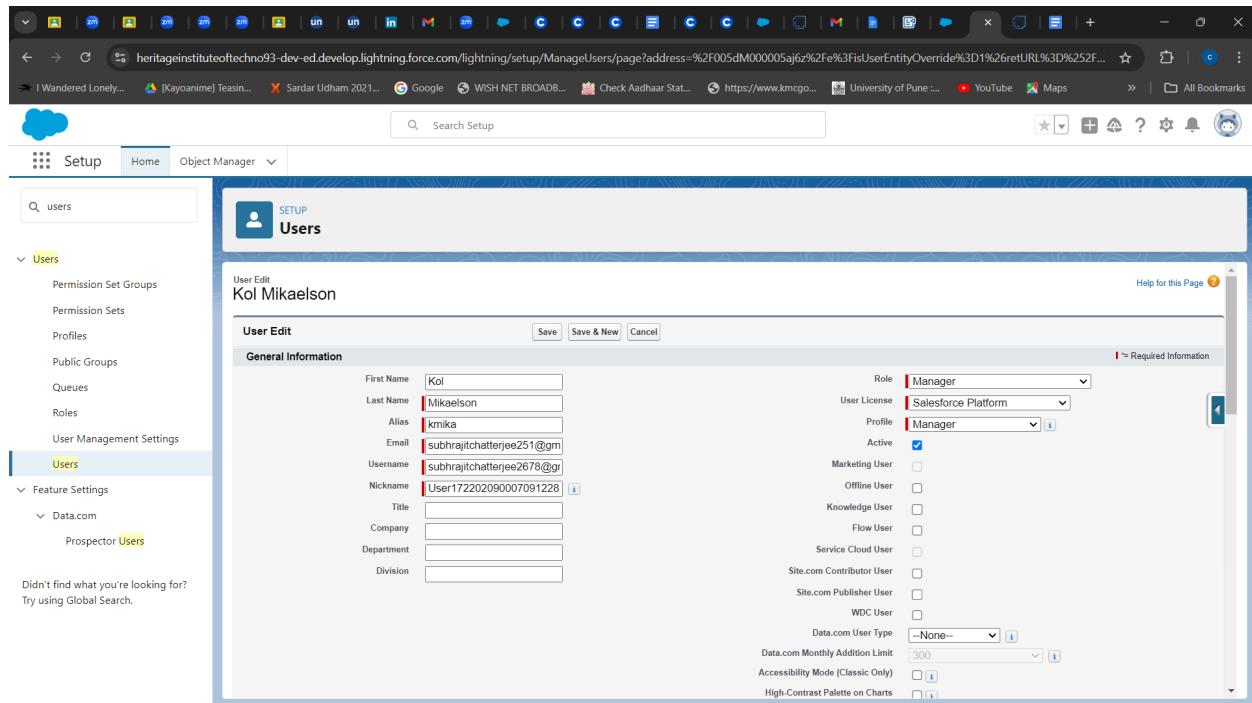
## TASK 29: Create User(HR)

1. Go to setup --> type users in quick find box --> select users --> click New user.
2. Fill up the details(Role-HR,User license-Salesforce,Profile-HR).
3. Save.



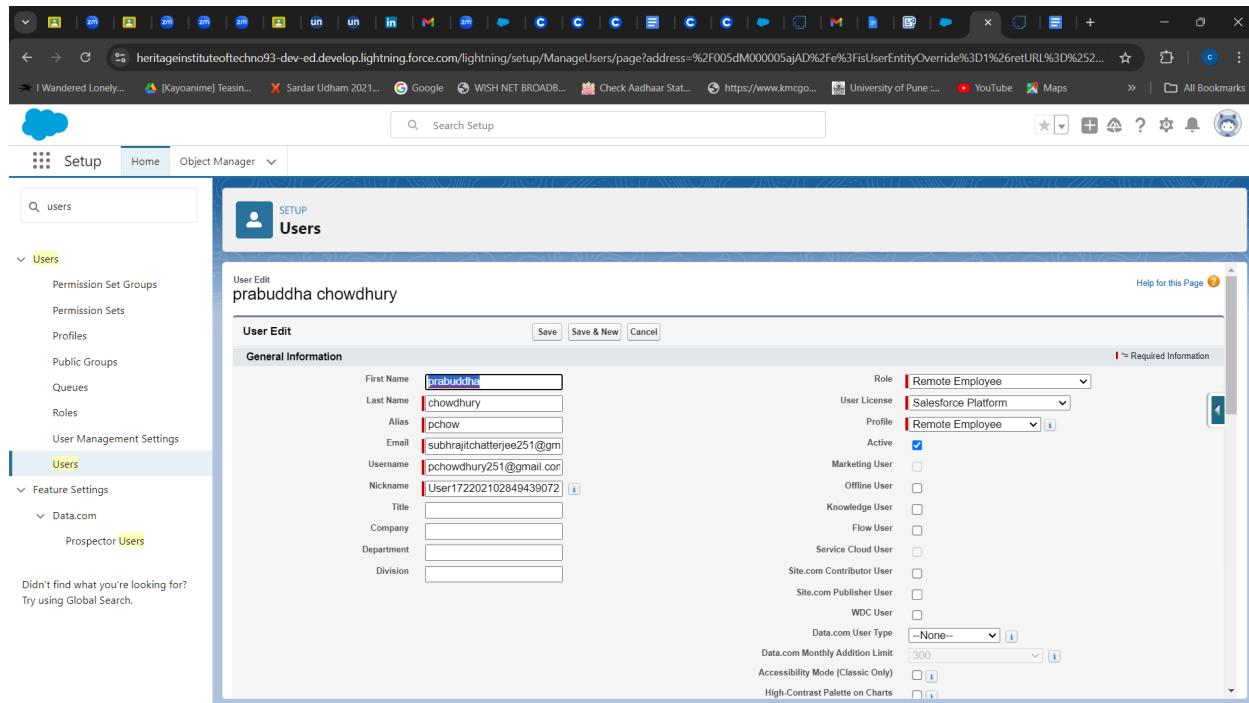
## TASK 30: Create User(Manager)

1. Go to setup --> type users in quick find box --> select users --> click New user.
2. Fill up the details(Role-Manager,User license-Salesforce Platform,Profile-Manager).
3. Save.



## TASK 31: Create More Users

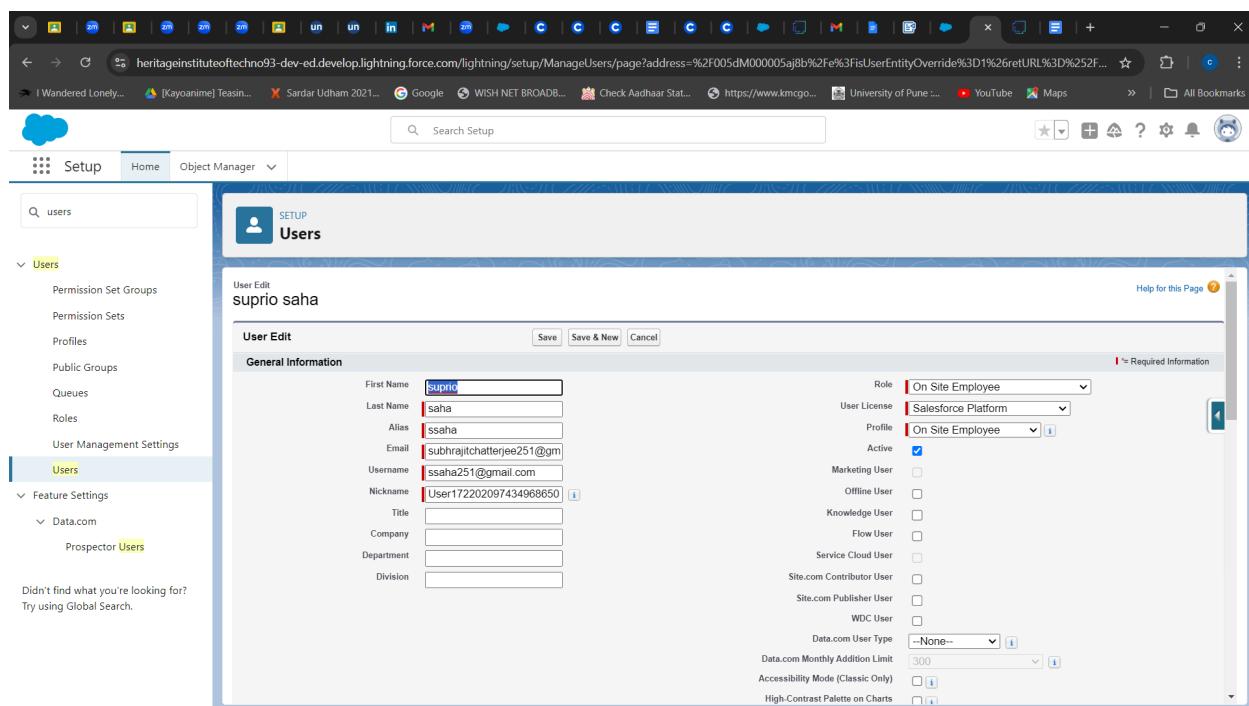
1. We create two users for remote employee and on-site employee according to task 30.



User Edit  
prabuddha chowdhury

General Information

First Name	prabuddha	Role	Remote Employee
Last Name	chowdhury	User License	Salesforce Platform
Alias	pchow	Profile	Remote Employee
Email	subhrajit chatterjee251@gmail.com	Active	<input checked="" type="checkbox"/>
Username	pchowdhury251@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User172202102849439072	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	None
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>



User Edit  
suprio saha

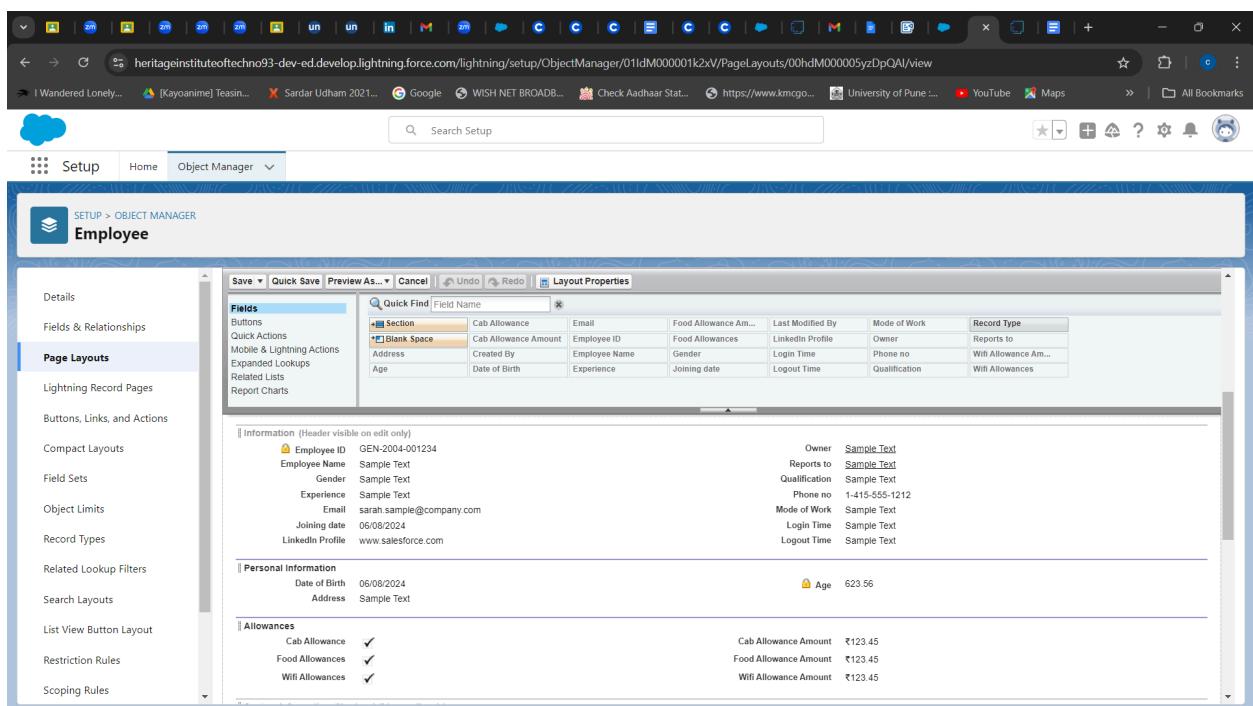
General Information

First Name	suprio	Role	On Site Employee
Last Name	saha	User License	Salesforce Platform
Alias	ssaha	Profile	On Site Employee
Email	subhrajit chatterjee251@gmail.com	Active	<input checked="" type="checkbox"/>
Username	ssaha251@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User172202097434968650	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	None
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>

# Page Layouts

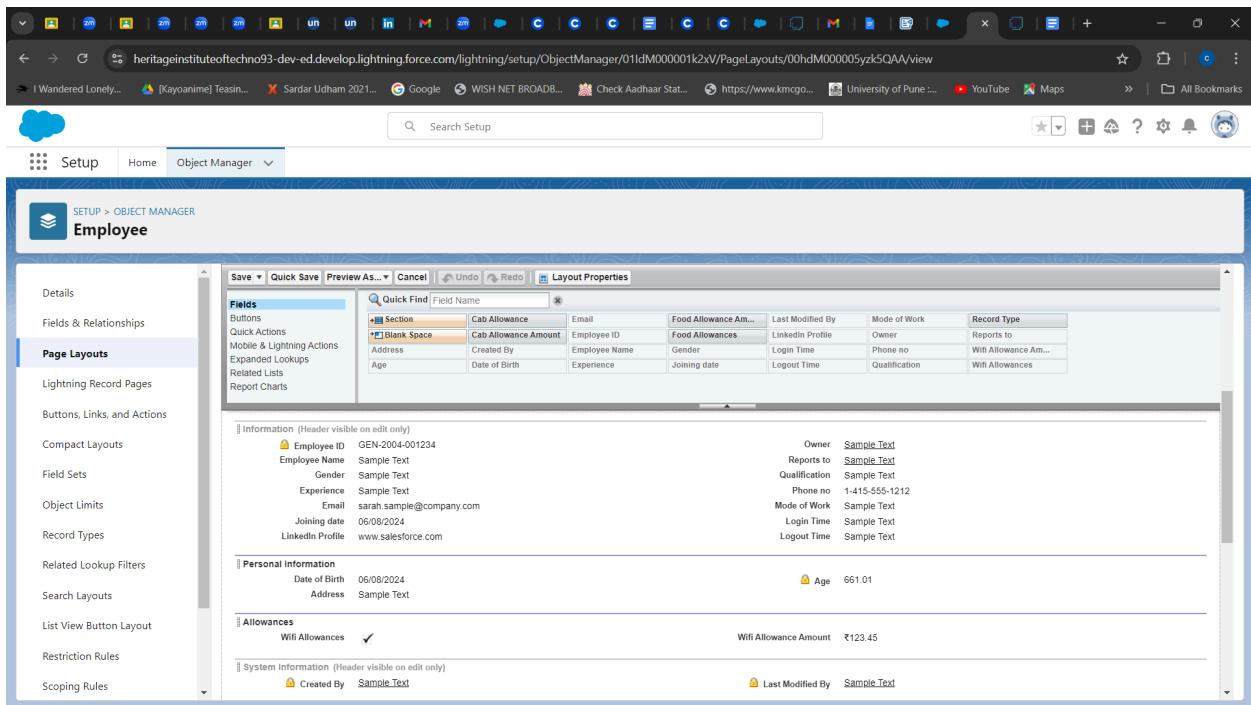
## TASK 32: creating a page layout for Employee object

1. Go to Setup --> Click on Object Manager --> Search for the object (Employee) --> From drop down click on Edit.
2. Click on Page layout --> 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.



## TASK 33: creating another page layout for Employee object

1. We 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 according to task 32.

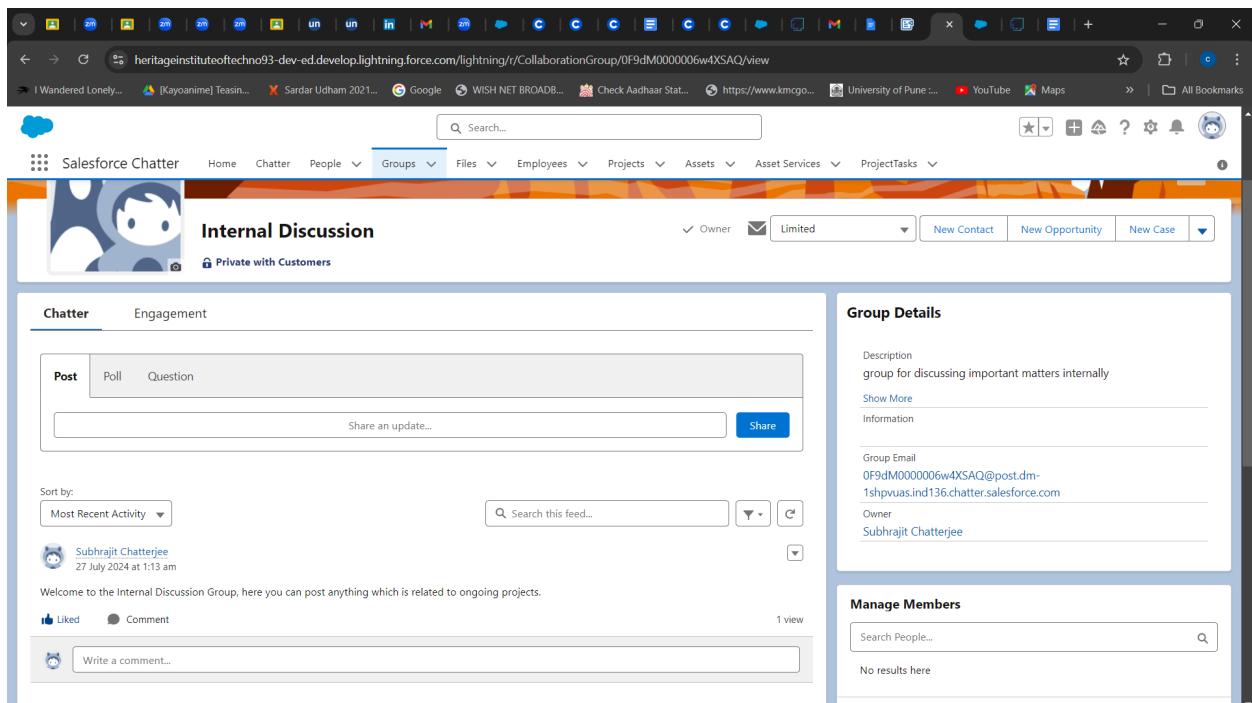


# Chatter Groups

## TASK 34: 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( Group Name -Internal Discussion,Access Type - Private, Allow Customers - Checked)
5. Click Save & Next. Skip the Upload Picture section and click Next.
6. On the Manage Members screen, click Add next to users we created in the previous activity.
7. Click Done.
8. This is how our group interface looks like.



The screenshot shows the Salesforce Chatter Groups interface for the 'Internal Discussion' group. The top navigation bar includes links for Home, Chatter, People, Groups, Files, Employees, Projects, Assets, Asset Services, and ProjectTasks. The 'Groups' link is currently selected. The main content area displays the 'Internal Discussion' group details. The group is described as 'Private with Customers'. The 'Group Details' sidebar shows the group's email address (0F9dM0000006w4XSAQ@post.d...), owner (Subhrajit Chatterjee), and a note that it's a group for discussing important matters internally. The 'Manage Members' sidebar shows a search bar and a message stating 'No results here'. The main feed area shows a post from Subhrajit Chatterjee dated 27 July 2024 at 1:13 am, welcoming users to the group. The feed also includes a 'Share an update...' button and a 'Search this feed...' search bar.

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.

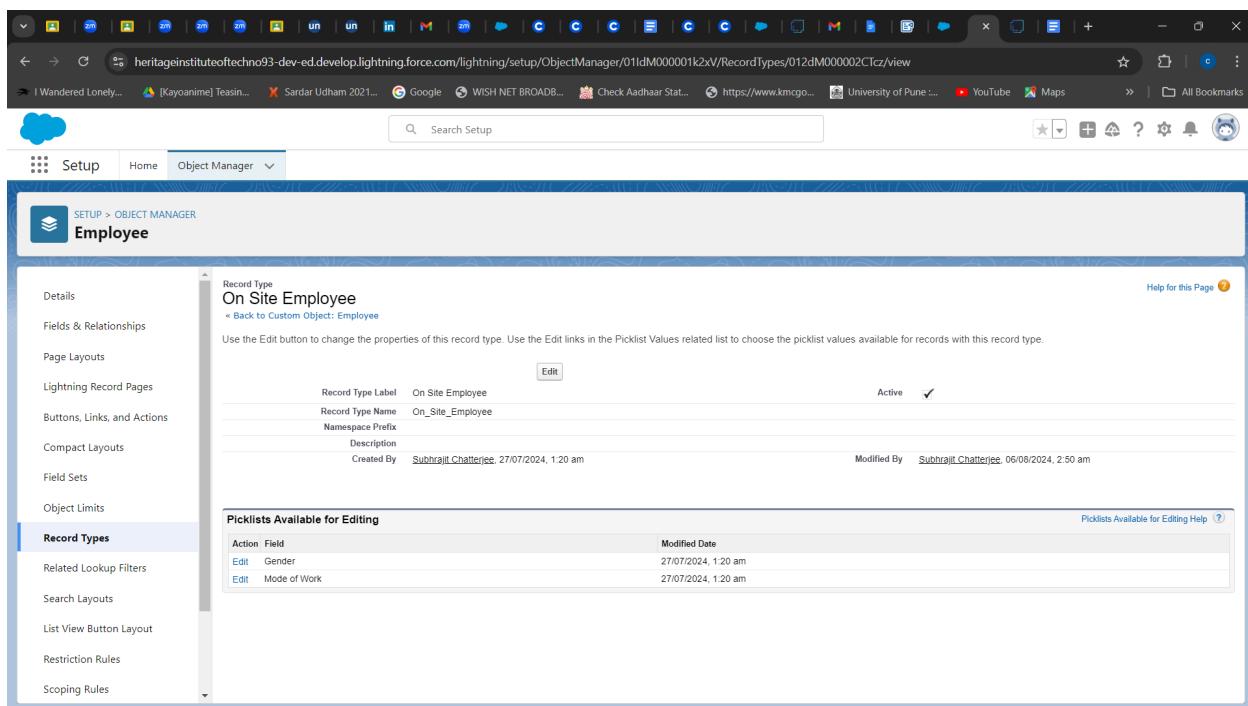
10. Click Share.

## Record Types

### TASK 35: Creating On Site Employee Record Type

To create a Record Type:

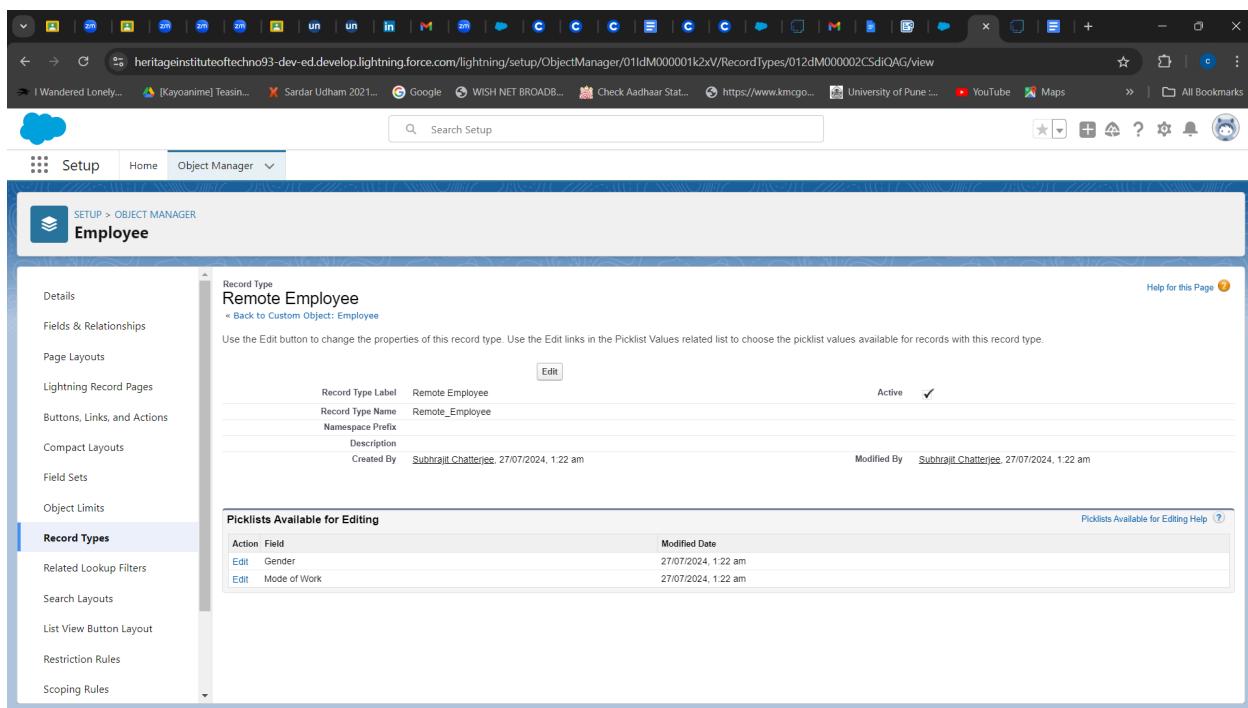
1. Go to Setup --> click on Object Manager --> Search for the object (Employee) --> from drop down click Edit.
2. From the left panel click Record Types --> New.
3. Give Record Type Label as “On Site Employee” and make it active.
4. Uncheck for “Make Available”.
5. Scroll down and check for the Manager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



The screenshot shows the Salesforce Object Manager interface. The left sidebar is collapsed, and the main content area displays the 'Record Type' page for the 'Employee' object. The page title is 'On Site Employee' with a link to 'Custom Object: Employee'. The page includes a summary section with fields like 'Record Type Label' (On Site Employee), 'Record Type Name' (On\_Site\_Employee), 'Namespace Prefix', 'Description', 'Created By' (Subhrajit Chatterjee, 27/07/2024, 1:20 am), and 'Modified By' (Subhrajit Chatterjee, 06/08/2024, 2:50 am). Below this is a table titled 'Picklists Available for Editing' with two entries: 'Gender' and 'Mode of Work', both modified on 27/07/2024, 1:20 am. The left sidebar lists various setup categories, with 'Record Types' currently selected.

## TASK 36: Creating Remote Employee 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 “Remote 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 Remote Employee Layout for manager profile and System Administrator.
7. click Save.



The screenshot shows the Salesforce Object Manager interface. The left sidebar is collapsed, and the main area displays the 'Employee' object. A new record type, 'Remote Employee', is being created. The 'Record Type Label' is set to 'Remote Employee', and the 'Active' checkbox is checked. The 'Record Type Name' is 'Remote\_Employee'. The 'Created By' field shows 'Subhrajit Chatterjee' with a timestamp of '27/07/2024, 1:22 am'. The 'Modified By' field also shows 'Subhrajit Chatterjee' with the same timestamp. A table titled 'Picklists Available for Editing' lists two entries: 'Gender' and 'Mode of Work', both of which were modified on '27/07/2024, 1:22 am'.

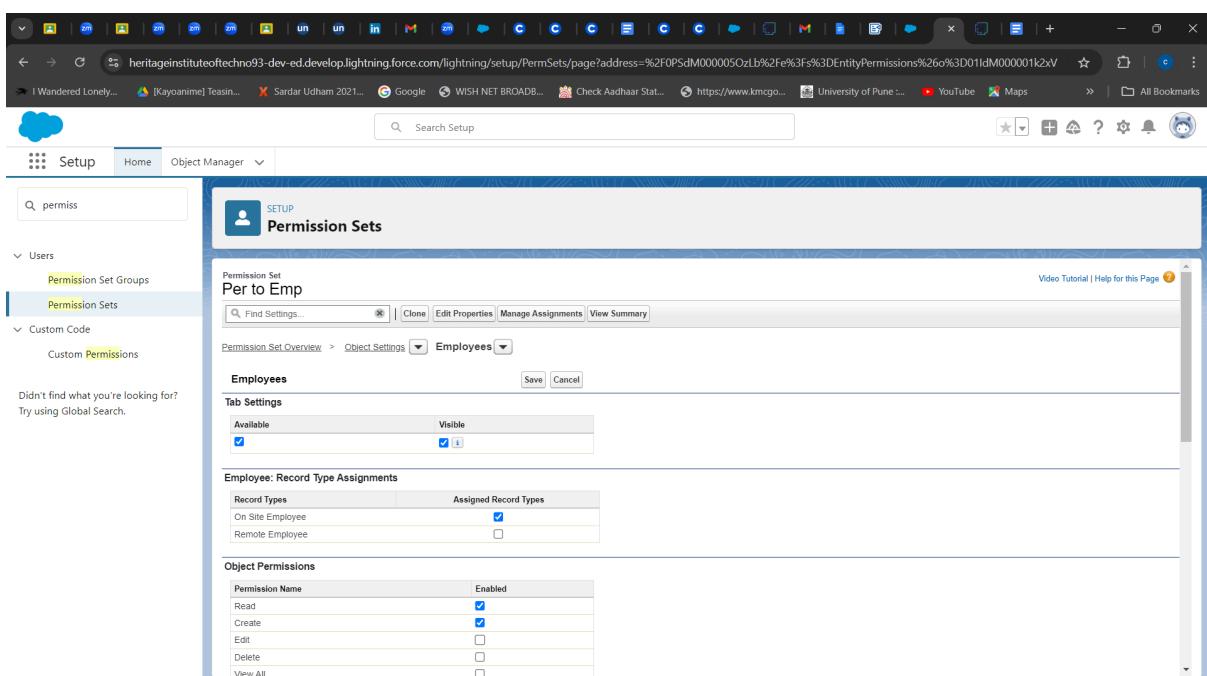
Action	Field	Modified Date
Edit	Gender	27/07/2024, 1:22 am
Edit	Mode of Work	27/07/2024, 1:22 am

# Permission Sets

## TASK 37: 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
11. Click on Done.



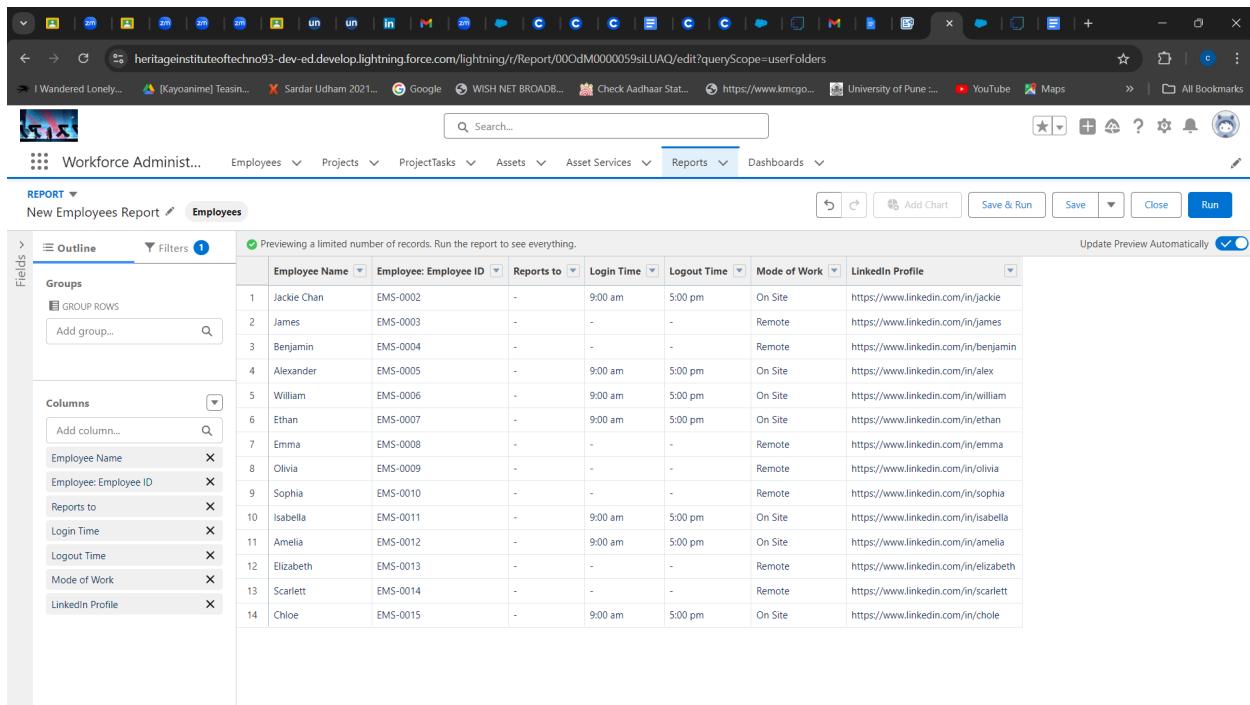
The screenshot shows the Salesforce Setup interface for creating a Permission Set. The 'Permission Sets' page is displayed, with a permission set named 'Per to Emp' selected. The 'Employees' tab is active under the 'Object Settings' section. In the 'Tab Settings' table, the 'Available' checkbox is checked. The 'Employee: Record Type Assignments' section shows 'On Site Employee' assigned the 'Visible' record type. The 'Object Permissions' section lists 'Read' and 'Create' as checked permissions, while 'Edit', 'Delete', and 'View All' are unchecked.

# Reports

## TASK 38: Create Report

To Create a Report:

1. Go to the app --> click on the reports tab
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
5. Save or run it.



The screenshot shows a Salesforce Lightning interface for creating a report. The title 'New Employees Report' is visible, along with a 'Employees' filter. The report table displays 14 rows of employee data with the following columns: Employee Name, Employee: Employee ID, Reports to, Login Time, Logout Time, Mode of Work, and LinkedIn Profile. The data includes names like Jackie Chan, James, Benjamin, Alexander, William, Ethan, Emma, Olivia, Sophia, Isabella, Amelia, Elizabeth, Scarlett, and Chloe, each with a unique Employee ID and a LinkedIn profile link.

Employee Name	Employee: Employee ID	Reports to	Login Time	Logout Time	Mode of Work	LinkedIn Profile
1 Jackie Chan	EMS-0002	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/jackie">https://www.linkedin.com/in/jackie</a>
2 James	EMS-0003	-	-	-	Remote	<a href="https://www.linkedin.com/in/james">https://www.linkedin.com/in/james</a>
3 Benjamin	EMS-0004	-	-	-	Remote	<a href="https://www.linkedin.com/in/benjamin">https://www.linkedin.com/in/benjamin</a>
4 Alexander	EMS-0005	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/alex">https://www.linkedin.com/in/alex</a>
5 William	EMS-0006	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/william">https://www.linkedin.com/in/william</a>
6 Ethan	EMS-0007	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/ethan">https://www.linkedin.com/in/ethan</a>
7 Emma	EMS-0008	-	-	-	Remote	<a href="https://www.linkedin.com/in/emma">https://www.linkedin.com/in/emma</a>
8 Olivia	EMS-0009	-	-	-	Remote	<a href="https://www.linkedin.com/in/olivia">https://www.linkedin.com/in/olivia</a>
9 Sophia	EMS-0010	-	-	-	Remote	<a href="https://www.linkedin.com/in/sophia">https://www.linkedin.com/in/sophia</a>
10 Isabella	EMS-0011	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/isabella">https://www.linkedin.com/in/isabella</a>
11 Amelia	EMS-0012	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/amelia">https://www.linkedin.com/in/amelia</a>
12 Elizabeth	EMS-0013	-	-	-	Remote	<a href="https://www.linkedin.com/in/elizabeth">https://www.linkedin.com/in/elizabeth</a>
13 Scarlett	EMS-0014	-	-	-	Remote	<a href="https://www.linkedin.com/in/scarlett">https://www.linkedin.com/in/scarlett</a>
14 Chloe	EMS-0015	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/chole">https://www.linkedin.com/in/chole</a>

## TASK 39: Create 2 more Report

1. We create a report with report type: "Employees with ProjectTasks and Projects".
2. We create a report with report type: "Employees with Assets".

Workforce Administ...

Employees with ProjectTasks and Projects Employees with ProjectTasks and Projects

REPORT

Employees with ProjectTasks and Projects Employees with ProjectTasks and Projects

Fields

Groups

Project Task: Project ID (2) CRM app (2)

Project Task: Project Name (2) Project Skybound (2)

Project Task: Project Name (1) Project Oceanic (1)

Project Task: Project ID (1) Project Quantum Leap (1)

Project Task: Project Name (2) Project Horizon (2)

Project Task: Project Name (1) Project Zenith (2)

Project Task: Project Task Name (1) Project Atlas (1)

Employee: Employee ID (2) EMS-0002 EMS-0003

Employee Name (2) Jackie Chan James

ProjectTask: Project Task Name (2) Make a flow Implement data encryption and security protocols for cloud storage

Employee Name (2) Alexander William

ProjectTask: Project Task Name (2) Integrate the system with existing marine research databases Develop an AI-based system for real-time ocean monitoring

Employee Name (2) Benjamin Chloe

ProjectTask: Project Task Name (2) Research and implement quantum computing algorithms for data processing Develop API integrations for third-party services

Employee Name (2) Emma Sophia

ProjectTask: Project Task Name (2) Implement push notifications and user authentication features Design a mobile app interface for the new service platform

Employee Name (2) Jackie Chan James

ProjectTask: Project Task Name (2) Conduct a comprehensive market analysis for the new product launch Develop a marketing strategy including digital campaigns and partnerships

Employee Name (2) Olivia

ProjectTask: Project Task Name (2) Redesign the company's legacy system for enhanced user experience

Row Counts Detail Rows Subtotals Grand Total

Update Preview Automatically

Workforce Administ...

Employees with Assets Assets with Employee Name

REPORT

Employees with Assets Assets with Employee Name

Fields

Groups

Asset Type (2) Laptop Charger (2)

Asset Type (1) Subtotal

Asset Type (1) Monitor (2)

Asset Type (1) Subtotal

Asset Type (1) Total (10)

Asset: Asset Name (2) Lenovo Laptop Charger HP Laptop Charger

Model Name (2) Lenovo ThinkPad 65W Slim Tip Adapter HP 65W Smart AC Adapter

Employee Name: Employee ID (2) EMS-0002 EMS-0006

Employee Name: Employee Name (2) Jackie Chan William

Asset: Asset Name (3) Microsoft Wireless Mouse Logitech Wireless Mouse Razer Wireless Mouse

Model Name (3) Microsoft Surface Arc Mouse Logitech M330 Silent Plus Razer DeathAdder V2

Employee Name: Employee ID (3) EMS-0002 EMS-0003 EMS-0010

Employee Name: Employee Name (3) Jackie Chan James Sophia

Asset: Asset Name (2) Samsung Monitor ASUS Monitor

Model Name (2) Samsung Odyssey G5 ASUS ProArt PA278QV

Employee Name: Employee ID (2) EMS-0004 EMS-0015

Employee Name: Employee Name (2) Benjamin Chloe

Asset: Asset Name (3) dell cpu AMD CPU Intel CPU

Model Name (3) dell cpu ef456 AMD Ryzen 9 5900X Intel Core i9-11900K

Employee Name: Employee ID (3) EMS-0002 EMS-0005 EMS-0014

Employee Name: Employee Name (3) Jackie Chan Alexander Scarlett

Row Counts Detail Rows Subtotals Grand Total

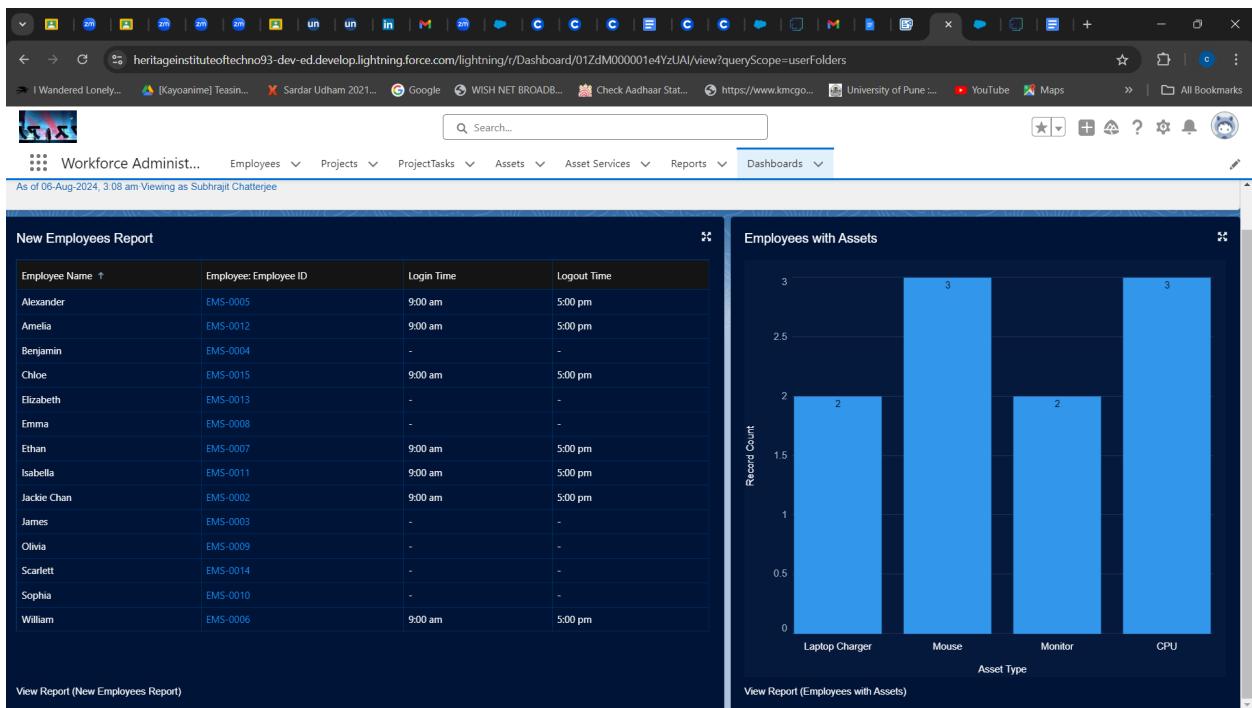
Update Preview Automatically

# Dashboards

## TASK 40: Create Dashboard

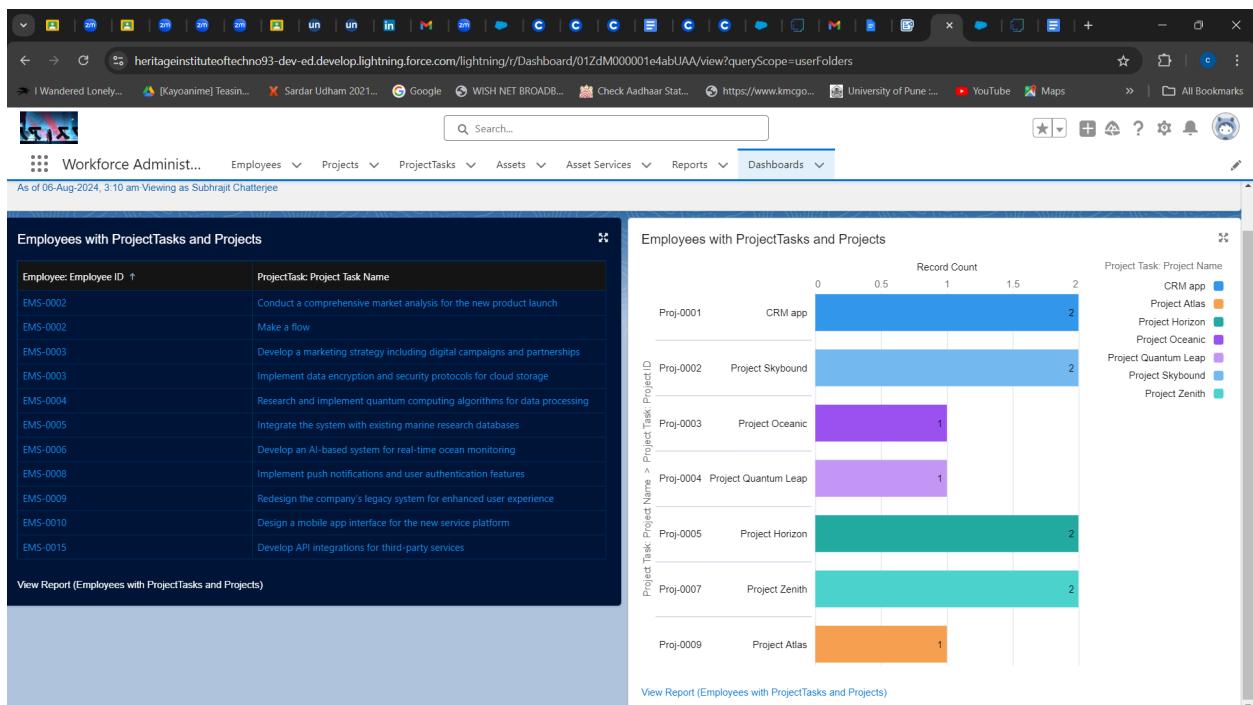
To Create a Dashboard

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.



## TASK 41: Create Another 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 another Report and click on select.
5. Click Add then click on Save and then click on Done.



# THANK YOU