



Workforce Administration Solution

Prepared by

Divyansh Sharma

divyansh.sharma292002@gmail.com

ABSTRACT

This document presents a comprehensive overview of the Workforce Administration Solution . The solution encompasses advanced data management and security protocols, which ensure the integrity and availability of sensitive employee data. By automating data replication and backup processes, the system offers robust disaster recovery and reduces administrative overhead. The implementation has significantly streamlined the management of employee project assignments and asset allocation, facilitating real-time monitoring and reporting capabilities. This transition has led to marked improvements in administrative tasks, resource optimization, and overall system performance, culminating in increased productivity and operational excellence within the organization.

The Workforce Administration Solution includes several key features and functionalities designed to enhance the management of employee information, project assignments, and asset allocation. :

Centralized Employee Data Management

- Consolidates all employee data into a single system for easy management.
- Manages personal details, job roles, project assignments, and performance evaluations.

Project Tracking and Management

- Allows real-time tracking and management of employee project assignments.
- Facilitates project assignment and reassignment.

Asset Assignment and Tracking

- Maintains records of assets assigned to each employee.
- Provides functionality for asset check-in and check-out.

Enhanced Data Security

- Implements strong security protocols to protect sensitive data.
- Includes robust encryption and secure data access controls.

Performance Monitoring and Reporting

- Tools for monitoring and evaluating employee performance.
- Comprehensive reporting capabilities for management decision-making.

User Interface Customization

- Customizable dashboards to meet various departmental needs.
- Adjustable layouts and personalized views to enhance user experience.

Bulk Data Importing

- Efficient data migration and integration from other systems.
- Capability to import bulk data including employee and asset information.

Compliance and Regulatory Adherence

- Ensures compliance with industry regulations and standards.
- Maintains audit trails for compliance verification.

INDEX:

- Introduction
- Object
- Tabs
- The lightening app
- Fields & Relationships
- Setting OWD
- User Adoption
- Import Data
- Profiles
- Roles
- Users
- Page layouts
- Chatter Group
- Record Types
- Permission sets
- Reports
- Dashboards
- Conclusion

INTRODUCTION

In today's dynamic business environment, managing workforce data efficiently is crucial for any organization looking to enhance operational efficiency and data security. A robust workforce administration solution plays a pivotal role in transforming the way businesses handle their human resources processes.

Real-Life Use Case:

A multinational corporation, with over 10,000 employees spread across various global offices, faced significant challenges in managing its human resources data. The company struggled with decentralized data storage, inconsistent employee data access, and cumbersome administrative processes. To address these issues, the company implemented a comprehensive workforce administration solution.

The solution centralized all employee data into a single platform, enabling easy access and management of detailed employee profiles, including job roles, project assignments, and performance evaluations. This centralization facilitated more informed decision-making and allowed HR teams to deploy resources more efficiently.

Additionally, the system included robust asset management capabilities, enabling the tracking of company assets assigned to employees such as work devices and equipment. This feature ensured accountability and reduced the incidences of asset misplacement or loss.

Through automated data replication and secure backup mechanisms, the solution ensured data integrity and availability, significantly reducing the risks associated with data loss. Moreover, enhanced security protocols, including data encryption and access controls, were established to safeguard sensitive information against unauthorized access.

The implementation of this workforce administration solution streamlined the company's HR operations, significantly reduced administrative overheads, and enhanced data security. It empowered the HR department to focus on strategic initiatives like employee engagement and talent development, thus improving overall organizational productivity and efficiency.

This use case exemplifies how a sophisticated workforce administration solution can revolutionize HR management by simplifying complex processes and ensuring that critical data is secure and readily accessible.

OBJECTS

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:

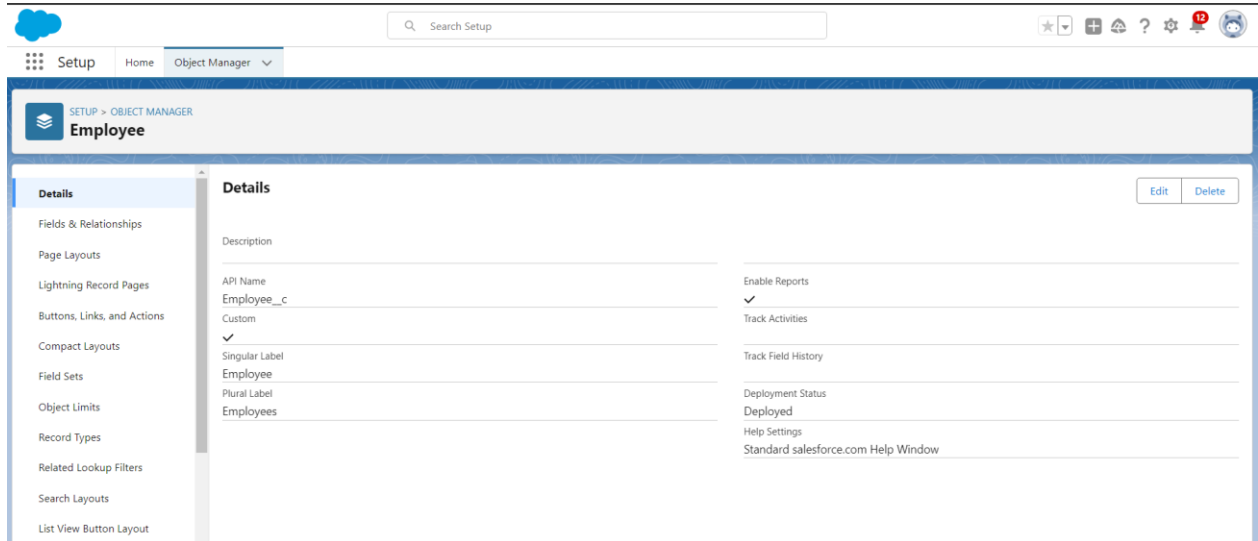
1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Create Employee Object

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.

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



Create Project Object

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

To create an object:

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

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled "Search Setup". Below it, the navigation menu includes "Setup", "Home", and "Object Manager". The main content area is titled "SETUP > OBJECT MANAGER Project". On the left, a 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, Related Lookup Filters, Search Layouts, and List View Button Layout. The "Details" section is selected, showing fields for Description, API Name (Project__c), Custom (checked), Singular Label (Project), Plural Label (Projects), and several checkboxes for Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). "Edit" and "Delete" buttons are in the top right.

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

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--> ProjectTask
 - 2) Plural label name--> ProjectTasks
 - 3) Enter Record Name Label and Format
 - 1 Record Name : Project ID
 - 2 Data Type : Text
- 2. Click on Allow reports,**
- 3. Allow search --> Save**

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

This screenshot shows the Salesforce Setup interface for a newly created object named "ProjectTask". The layout is identical to the previous screenshot, but the object name is "ProjectTask". The "Details" section shows the API Name as "ProjectTask__c", Custom is checked, Singular Label is "ProjectTask", and Plural Label is "ProjectTasks". The checkboxes for "Enable Reports", "Track Activities", "Track Field History", and "Deployment Status" (set to "Deployed") are all checked. The "Help Settings" are set to "Standard salesforce.com Help Window". "Edit" and "Delete" buttons are visible in the top right corner.

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--> Asset
- 2) Plural label name--> Assets
- 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


The screenshot shows the Salesforce Object Manager interface for the 'Asset' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Details' and includes a description field, API Name (Asset__c), Custom checkbox, Singular Label (Asset), Plural Label (Assets), and a list of settings: Enable Reports (checked), Track Activities (checked), Track Field History, Deployment Status (Deployed), Help Settings, and a link to the Standard Salesforce.com Help Window. Edit and Delete buttons are located in the top right corner of the details section.

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--> Asset Service
- 2) Plural label name--> Asset Service
- 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



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER
Asset Service

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Details

Description

API Name
Asset_Service__c

Custom

✓

Singular Label
Asset Service

Plural Label
Asset Services

Enable Reports

✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

EditDelete

TABS

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

Creating a Custom Tab (Employee)

To create a Tab:(Employee)

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

Creating a Custom Tab (Project)

To create a Tab:(Project)

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

Creating tabs for remaining objects

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

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'tab' entered and a list of navigation items: Feature Settings, Analytics, Tableau, Tableau Embedding, User Interface, Loaded Console Tab Limit, Rename Tabs and Labels, and Tabs. The main content area is titled 'Custom Tabs' and includes a 'New' button and a 'What Is This?' link. Below this is a table of Custom Object Tabs with columns for Action, Label, Tab Style, and Description. The table lists five tabs: Assets (Leaf), Asset Services (Headset), Employees (Can), Projects (Compass), and ProjectTasks (Guitar). At the bottom, there is a section for Web Tabs, which currently shows 'No Web Tabs have been defined'.

Action	Label	Tab Style	Description
Edit Del	Assets	Leaf	
Edit Del	Asset Services	Headset	
Edit Del	Employees	Can	
Edit Del	Projects	Compass	
Edit Del	ProjectTasks	Guitar	

Web Tabs [New](#) [What Is This?](#)

No Web Tabs have been defined

THE LIGHTNING APP

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

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.

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.

To Add User Profiles:

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



Search...



Workforce Administrat... Employees Projects ProjectTasks Assets Asset Services Reports Dashboards



Employees

Recently Viewed



New Import Change Owner Assign Label

2 Items • Updated a few seconds ago

Search this list... [Settings] [List View] [Refresh] [Edit] [Share] [Filter]

	<input type="checkbox"/>	Employee ID	
1	<input type="checkbox"/>	EMS-0001	
2	<input type="checkbox"/>	EMS-0002	

FIELDS

Creating Text Field in Employee Object

To create fields in an object:

1. Go to setup --> click on Object Manager --> type object name(Employee) in quick find bar --> click on the object.
2. Now click on “Fields & Relationships” --> New
3. Select Data type as “Text”.
4. Click on Next
5. Fill the above as following:
 - 1 Field Label: Employee Name
 - 2 Length : 18
 - 3 Field Name : gets auto generated
 - 4 Click on Next --> Next --> Save and new.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and several utility icons. Below the navigation bar, the 'Setup' menu is expanded, showing 'Home' and 'Object Manager'. The 'Object Manager' page for the 'Employee' object is displayed. The left sidebar contains a list of options: 'Details', 'Fields & Relationships' (selected), 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'List View Button Layout', and 'Restriction Rules'. The main content area is titled 'Employee Custom Field' and 'Employee Name'. It includes a 'Back to Employee' link and a 'Validation Rules (0)' link. The 'Custom Field Definition Detail' section has tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section contains a table with the following data:

Field Label	Employee Name	Object Name	Employee
Field Name	Employee_Name	Data Type	Text
API Name	Employee_Name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Divyansh Sharma	22/09/2024, 3:39 pm	Modified By
			Divyansh Sharma, 22/09/2024, 3:39 pm

The 'General Options' section includes checkboxes for 'Required', 'Unique', 'Case Sensitive', and 'External ID', all of which are currently unchecked.

Creating Text Field in Employee Object

SETUP > OBJECT MANAGEREmployee

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction Rules

Employee Custom FieldDate of Birth.[Back to Employee](#)

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

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			
Created By	Divyansh Sharma 22/09/2024, 3:40 pm	Modified By	Divyansh Sharma 22/09/2024, 3:40 pm

General Options

Required☐

Default Value

Validation Rules

New

Validation Rules Help

SETUP > OBJECT MANAGEREmployee

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction Rules

Employee Custom FieldAge.[Back to Employee](#)

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Age	Object Name	Employee
Field Name	Age		
API Name	Age__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Divyansh Sharma 22/09/2024, 3:56 pm	Modified By	Divyansh Sharma 22/09/2024, 3:56 pm

Formula Options

Data TypeFormula

Decimal Places2

YEAR(TODAY()) - YEAR(Date_of_Birth__c)

Validation Rules

New

Validation Rules Help

SETUP > OBJECT MANAGEREmployee

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction Rules

Employee Custom FieldAddress.[Back to Employee](#)

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Address	Object Name	Employee
Field Name	Address	Data Type	TextArea
API Name	Address__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Divyansh Sharma 22/09/2024, 9:50 pm	Modified By	Divyansh Sharma 22/09/2024, 9:50 pm

General Options

Required☐

Default Value

Validation Rules

New

Validation Rules Help

Setup

Home

Object Manager

Search Setup

Star

Plus

Home

Help

Settings

Notifications

Profile

SETUP > OBJECT MANAGER

Employee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Fields & Relationships

26 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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

Show desktop

Setup

Home

Object Manager

Search Setup

Star

Plus

Home

Help

Settings

Notifications

Profile

SETUP > OBJECT MANAGER

Employee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Fields & Relationships

26 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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		
Owner	OwnerId	Lookup(User,Group)		✓
Phone no	Phone_no__c	Phone		

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).

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.

Set OWD as Private for Project and Asset Service objects.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "sharin" entered. Below the search bar, the "Security" section is expanded, showing "Guest User Sharing Rule Access Report" and "Sharing Settings". The main content area is titled "Sharing Settings" and displays a table of sharing settings for various objects. The table has three columns: "Default Internal Access", "Default External Access", and "Grant Access Using Hierarchies". The objects listed are: 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 settings for "Asset", "Asset Service", and "Employee" are highlighted in blue. The "Grant Access Using Hierarchies" checkbox is checked for "Asset", "Asset Service", and "Employee".

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Shipping Configuration Set	Public Read Only	Private	<input type="checkbox"/>
Streaming Channel	Public Read/Write	Private	<input type="checkbox"/>
Tableau Host Mapping	Public Read Only	Private	<input type="checkbox"/>
Waitlist	Private	Private	<input type="checkbox"/>
Web Cart Document	Private	Private	<input type="checkbox"/>
Work Order	Private	Private	<input type="checkbox"/>
Work Plan	Private	Private	<input type="checkbox"/>
Work Plan Template	Private	Private	<input type="checkbox"/>
Work Step Template	Private	Private	<input type="checkbox"/>
Work Type	Private	Private	<input type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input type="checkbox"/>
Asset	Public Read/Write	Private	<input checked="" type="checkbox"/>
Asset Service	Private	Private	<input checked="" type="checkbox"/>
Employee	Private	Private	<input checked="" type="checkbox"/>
Project	Private	Private	<input type="checkbox"/>

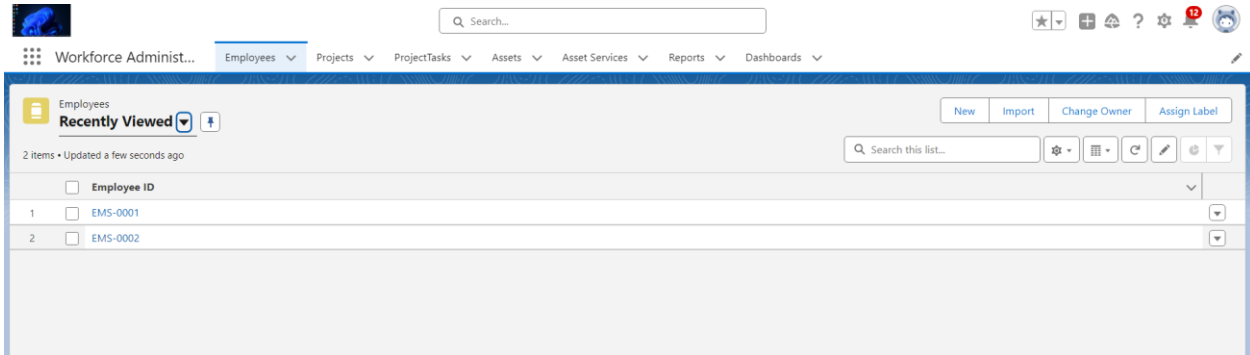
Other Settings: Standard Report Visibility ☒ Manual User Record Sharing ☐ Manager Groups ☐ Secure guest user record access ☐ Require permission to view record names in lookup fields ☐

Save Cancel

User Adoption

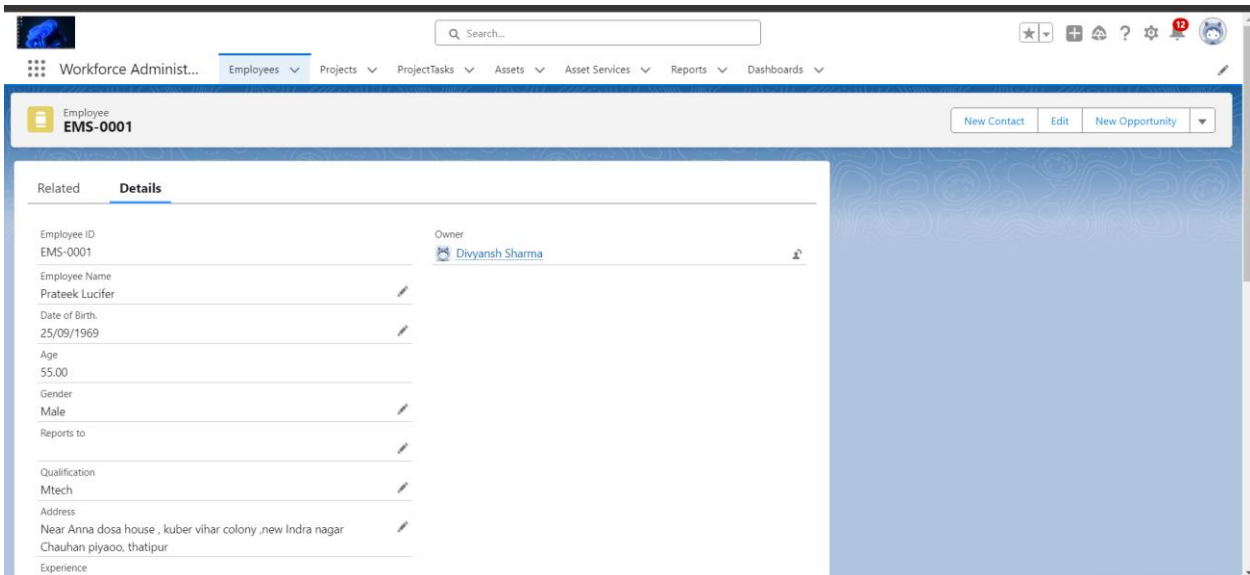
Create a Record (Employee)

1. Click on App Launcher on the left side of the screen.
2. Search Employee Management System & click on it.



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



Import 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.

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 your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.

Report: Employees							
Employees							
Total Records							
16							
	Employee Name	Employee: Employee ID	Reports to	Login Time	Logout Time	Mode of Work	LinkedIn Profile
1	Divyansh Sharma	EMS-0002	EMS-0001	12:30 am	2:15 am	On Site	-
2	Chloe	EMS-0016	-	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/chole
3	Scarlett	EMS-0015	-	-	-	Remote	https://www.linkedin.com/in/scarlett
4	Elizabeth	EMS-0014	-	-	-	Remote	https://www.linkedin.com/in/elizabeth
5	Amelia	EMS-0013	-	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/amelia
6	Isabella	EMS-0012	-	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/isabella
7	Sophia	EMS-0011	-	-	-	Remote	https://www.linkedin.com/in/sophia
8	Olivia	EMS-0010	-	-	-	Remote	https://www.linkedin.com/in/olivia
9	Emma	EMS-0009	-	-	-	Remote	https://www.linkedin.com/in/emma
10	Ethan	EMS-0008	-	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/ethan
11	William	EMS-0007	-	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/william
12	Alexander	EMS-0006	-	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/alex
13	Benjamin	EMS-0005	-	-	-	Remote	https://www.linkedin.com/in/benjamin
14	James	EMS-0004	-	-	-	Remote	https://www.linkedin.com/in/james

Profile

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.

HR Profile

To create a new profile:

1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (Standard user) --> enter profile name (HR) --> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Assets and Asset Services objects.
4. Scroll down and Click on Save.

The screenshot shows the Salesforce Setup interface for the 'HR' profile. The left sidebar contains a search bar with 'prof' and a list of items including 'Users' and 'Profiles'. The main content area is titled 'SETUP Profiles' and shows the 'HR' profile details. It includes a 'Profile Detail' section with fields for Name (HR), User License (Salesforce), Description, and Created By (Divyansh Sharma). Below this is the 'Page Layouts' section, which is a table showing various layouts assigned to the profile.

Page Layouts			
Standard Object Layouts			
Global	Global Layout [View Assignment]	Location Group	Location Group Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Macro	Macro Layout [View Assignment]
Account	Account Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]

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.

Setup Home Object Manager

Search Setup

Q prof

Users

Profiles

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

Profile Manager

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

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

Login IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Edit Clone Delete View Users

Profile Detail

Name	Manager	Custom Profile	✓
User License	Salesforce Platform		
Description			
Created By	Diyansh Sharma 24/09/2024, 11:36 pm	Modified By	Diyansh Sharma 27/09/2024, 12:17 am

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Invoice Line	Invoice Line Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Lead	Lead Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location	Location Layout [View Assignment]
Account	Account Layout [View Assignment]	Location Group	Location Group Layout [View Assignment]

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.

Setup Home Object Manager

Search Setup

Q prof

Users

Profiles

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

Profile On Site Employee

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

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

Login IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Edit Clone Delete View Users

Profile Detail

Name	On Site Employee	Custom Profile	✓
User License	Salesforce Platform		
Description			
Created By	Diyansh Sharma 24/09/2024, 11:39 pm	Modified By	Diyansh Sharma 27/09/2024, 12:17 am

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Invoice Line	Invoice Line Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Lead	Lead Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location	Location Layout [View Assignment]
Account	Account Layout [View Assignment]	Location Group	Location Group Layout [View Assignment]

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.

Creating HR Role

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

Creating more roles

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

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

The screenshot displays the Salesforce Setup interface for the 'Roles' section. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Creating the Role Hierarchy' and shows a tree view of the organization's role hierarchy. The hierarchy starts with 'Institute of Technology and Management' at the top, followed by 'CEO', 'CFO', 'COO', 'HR', 'Manager', 'On Site Employee', 'Remote Employee', 'SVP Customer Service & Support', and 'Customer Support International'. Each role in the hierarchy has an 'Add Role' button next to it. The 'Show in tree view' button is visible in the top right corner of the main content area.

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.

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

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Users' is selected under 'User Management Settings'. The main content area displays the 'User Detail' form for a new user named 'Niklaus Mikaelson'. The form includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), and Debug Mode. The 'Active' checkbox is checked, and the 'Role' is set to 'HR'.

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.

Creating more users

Create two more users as we created in activity 2.

The screenshot shows the Salesforce Setup interface. On the left, the navigation menu is visible with 'Users' selected under 'User Management Settings'. The main content area displays the 'User Detail' for 'Kol Mikaelson'. The user's email is 'dk22002_1@gmail.com' and the username is 'dkv@mikaelson.com'. The role is 'Manager' and the user license is 'Salesforce Platform'. The user is active, and the 'Marketing User' checkbox is checked. The 'Delegated Approver' is set to 'Manager'. The 'Accessibility Mode (Classic Only)' is set to 'Classic'.

User Detail	
Name	Kol Mikaelson
Alias	kmika
Email	dk22002_1@gmail.com [Verify]
Username	dkv@mikaelson.com
Nickname	Kollen
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	Manager
Role	Manager
User License	Salesforce Platform
Profile	Manager
Active	<input checked="" type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	View
Data.com User Type	
Accessibility Mode (Classic Only)	Classic
Debug Mode	<input type="checkbox"/>

PAGE LAYOUT

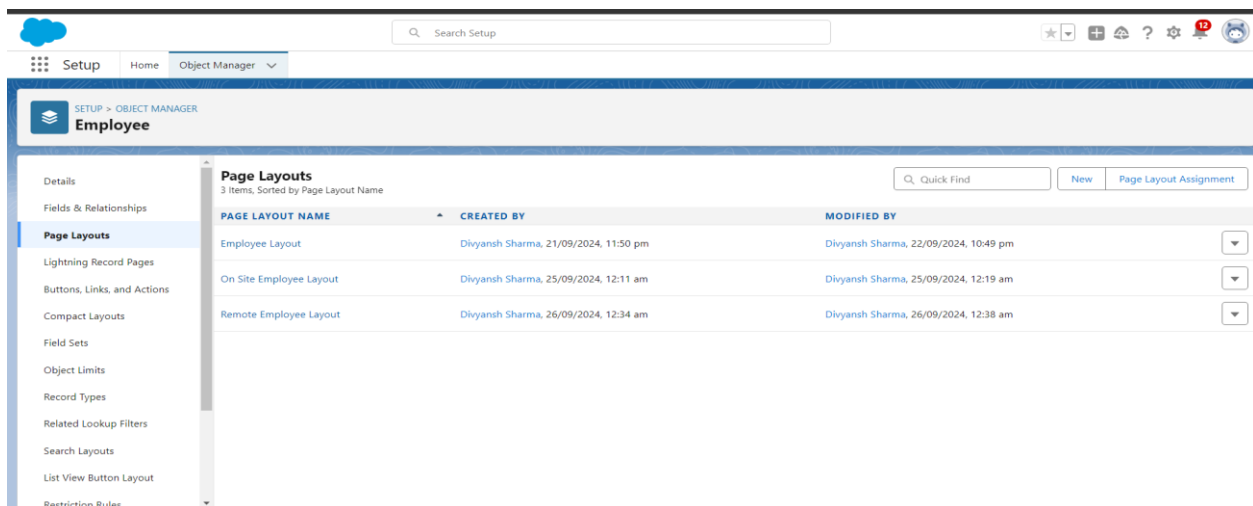
Creating a page layout for Employee object

To Create a Page layout:

1. Go to Setup --> Click on Object Manager --> Search for the object (Employee) --> From drop down click on Edit.
2. Click on 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.
8. Make sure your page layout looks like the picture above.

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

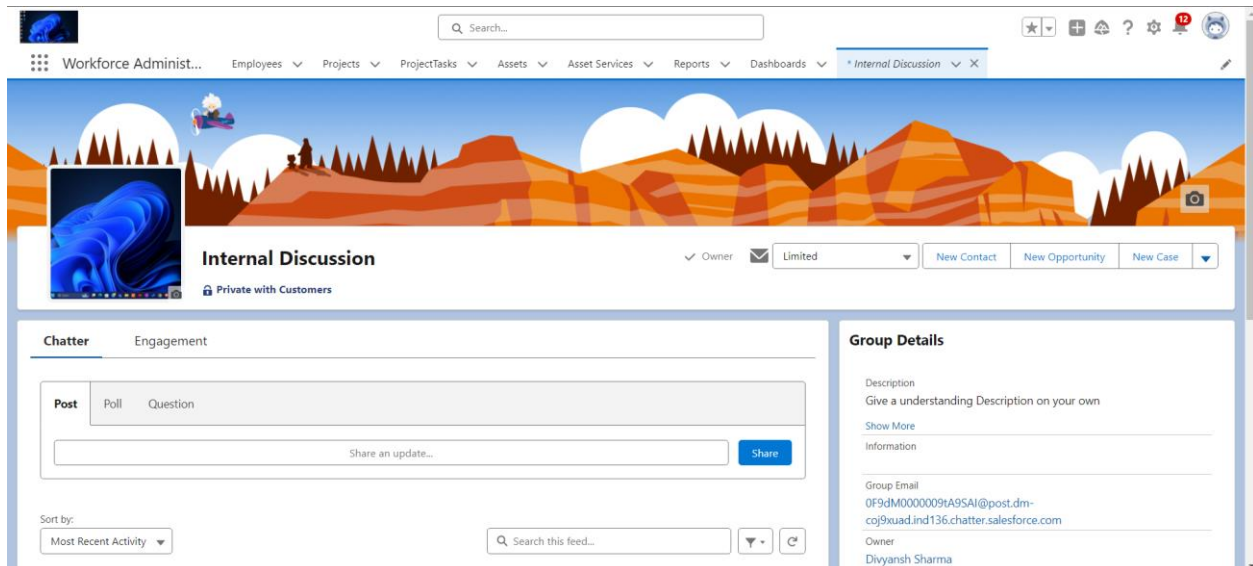
Salesforce Chatter Groups are collaborative spaces within the Salesforce platform that enable teams to communicate, share information, and collaborate on projects. They provide a centralized hub for discussions, file sharing, and updates, allowing users to stay connected, streamline workflows, and enhance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

Creating a chatter group for your organization.

1. To Create a chatter group:
2. Click the App Launcher.
3. Enter Groups in the Search apps and items... box and select Groups.
4. Click New.
5. 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

6. Click Save & Next. Skip the Upload Picture section and click Next.
7. On the Manage Members screen, click Add next to users you created in the previous activity.
8. Click Done.



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.

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.

The screenshot shows the Salesforce Setup interface for the 'Employee' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types (selected), Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Record Type On Site Employee' and includes an 'Edit' button. Below the title, there is a form with fields for Record Type Label (On Site Employee), Record Type Name (On_Site_Employee), Namespace Prefix, Description, Created By (Divyansh Sharma), and Modified By (Divyansh Sharma). The 'Active' checkbox is checked. At the bottom, there is a table titled 'Picklists Available for Editing' with columns for Action, Field, and Modified Date. The table contains two rows: 'Edit Gender' and 'Edit Mode of Work', both modified on 27/09/2024 at 12:16 am.

Action	Field	Modified Date
Edit	Gender	27/09/2024, 12:16 am
Edit	Mode of Work	27/09/2024, 12:16 am

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.

The screenshot shows the Salesforce Setup interface for the 'Employee' object, specifically the 'Remote Employee' Record Type configuration. The left sidebar is the same as the previous screenshot. The main content area is titled 'Record Type Remote Employee' and includes an 'Edit' button. Below the title, there is a form with fields for Record Type Label (Remote Employee), Record Type Name (Remote_Employee), Namespace Prefix, Description, Created By (Divyansh Sharma), and Modified By (Divyansh Sharma). The 'Active' checkbox is checked. At the bottom, there is a table titled 'Picklists Available for Editing' with columns for Action, Field, and Modified Date. The table contains two rows: 'Edit Gender' and 'Edit Mode of Work', both modified on 27/09/2024 at 12:17 am.

Action	Field	Modified Date
Edit	Gender	27/09/2024, 12:17 am
Edit	Mode of Work	27/09/2024, 12:17 am

PERMISSION SET

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.

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.

The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Permission Sets' and shows the details for a permission set named 'Per to Emp'. The 'Permission Set Overview' section includes fields for Description, License, API Name (Per_to_Emp), Namespace Prefix, Session Activation Required (unchecked), Created By (Divyansh Sharma), Last Modified By (Divyansh Sharma), and Permission Set Groups Added To (0). Below this, the 'Apps' section lists various settings: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, and Apex Class Access.

Permission Set Overview	
Description	
License	
API Name	Per_to_Emp
Namespace Prefix	
Session Activation Required	<input type="checkbox"/>
Created By	Divyansh Sharma 27/09/2024, 12:18 am
Last Modified By	Divyansh Sharma 27/09/2024, 12:22 am
Permission Set Groups Added To	0

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes

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

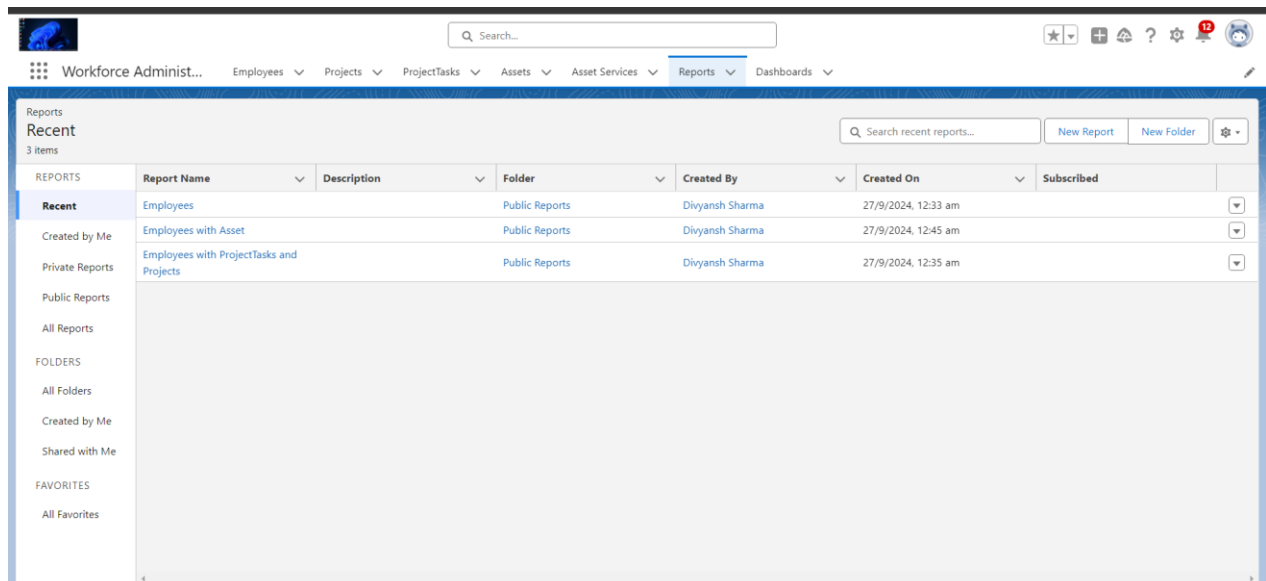
1. Tabular
2. Summary
3. Matrix
4. Joined Reports

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
--> Add fields from left pane as shown below
5. Save or run it.

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



The screenshot displays the Salesforce Reports interface. At the top, there is a navigation bar with the 'Reports' tab selected. Below the navigation bar, the 'Recent' section is visible, showing a list of reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports listed are 'Employees', 'Employees with Asset', and 'Employees with ProjectTasks and Projects'. The 'Employees' report is highlighted as the most recent.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Employees		Public Reports	Divyansh Sharma	27/9/2024, 12:33 am	
Created by Me	Employees with Asset		Public Reports	Divyansh Sharma	27/9/2024, 12:45 am	
Private Reports	Employees with ProjectTasks and Projects		Public Reports	Divyansh Sharma	27/9/2024, 12:35 am	

DASHBOARD

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.

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.

The screenshot displays a web application dashboard. At the top, there is a navigation bar with a search bar and several icons. Below the navigation bar, a menu bar shows various sections: Workforce Administ..., Employees, Projects, ProjectTasks, Assets, Asset Services, Reports, and Dashboards. The 'Dashboards' section is currently selected. Below the menu bar, the dashboard title is 'Dashboard 1' with a subtitle 'As of 27-Sept-2024, 12:49 am Viewing as Divyansh Sharma'. There are buttons for 'Refresh', 'Edit', and 'Subscribe'. The main content area features a table titled 'Employees' with columns: Employee Name, Employee ID, Reports, Login Time, and Logout Time. The table contains data for several employees, including Alexander, Amelia, Benjamin, Chloe, Divyansh Sharma, and Elizabeth. A 'View Report (Employees)' link is visible below the table.

Employee Name--f	Employee: Employee--	Reports--	Login Ti--	Logout Ti--
Alexander	EMS-0006	-	9:00 am	5:00 pm
Amelia	EMS-0013	-	9:00 am	5:00 pm
Benjamin	EMS-0005	-	-	-
Chloe	EMS-0016	-	9:00 am	5:00 pm
Divyansh Sharma	EMS-0002	EMS-0001	12:30 am	2:15 am
Elizabeth	EMS-0014	-	-	-

CONCLUSION

The **Workforce Administrator Solution** is a powerful tool that simplifies workforce management, enhances operational efficiency, and supports strategic HR initiatives. It reduces manual tasks, improves compliance, and provides a single source of truth for workforce data, ultimately allowing organizations to better align their workforce with business goals. As a cloud-based solution, it also promotes flexibility and adaptability to evolving business needs, positioning organizations for long-term growth and success.