

# **Workforce Administration Solution (Admin)**

**By**

**Geetha Malisetty**

**224g5a0406@srit.ac.in**

## **Project Abstract**

Workforce Administration Solution is a software application or platform designed to streamline and automate various aspects of employee's working on projects and Asset Assignment processes within an

organization. It serves as a centralized system for managing employee data, the number of projects an employee is working on, tracking employee performance, and keeping record for the assets which they are assigned to.

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## **INTRODUCTION**

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

## **OBJECTIVE**

A workforce administration solution aims to achieve the following goals:

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

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

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

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

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

**Data Accessibility:** To improve decision-making, make sure that personnel and projectrelated data is easily accessible

## **METHODOLOGY**

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

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

**Object Relationships:** For simple tracking, use relationships to connect staff members

to projects and assets.

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

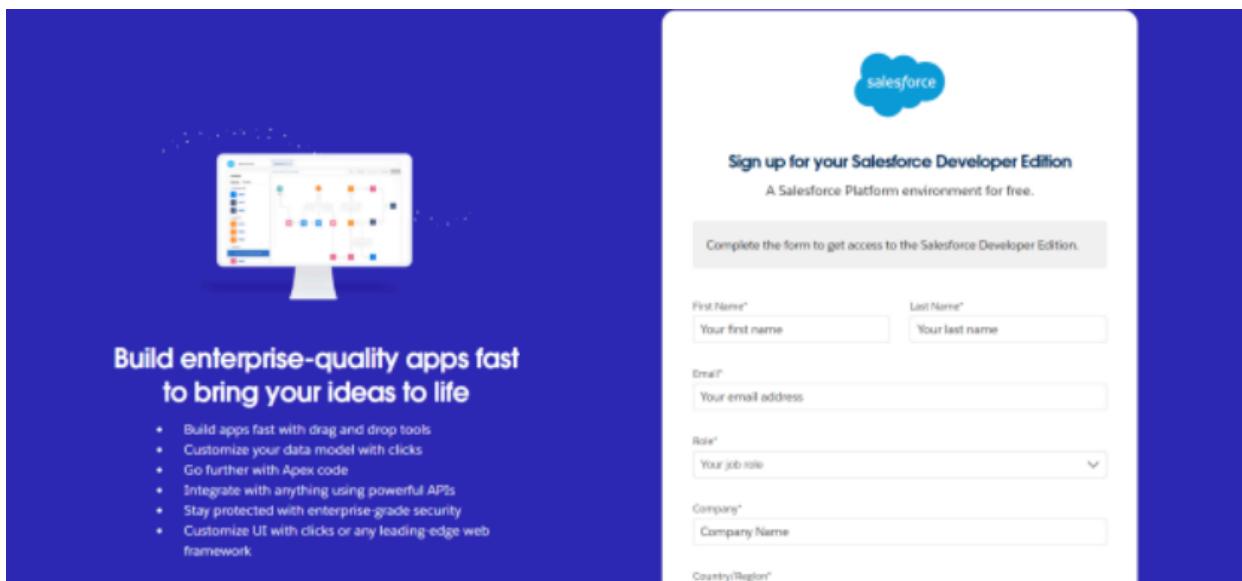
Dashboards and Reports: Create reports to keep an eye on project advancement and staff performance.

## Implementation Details

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

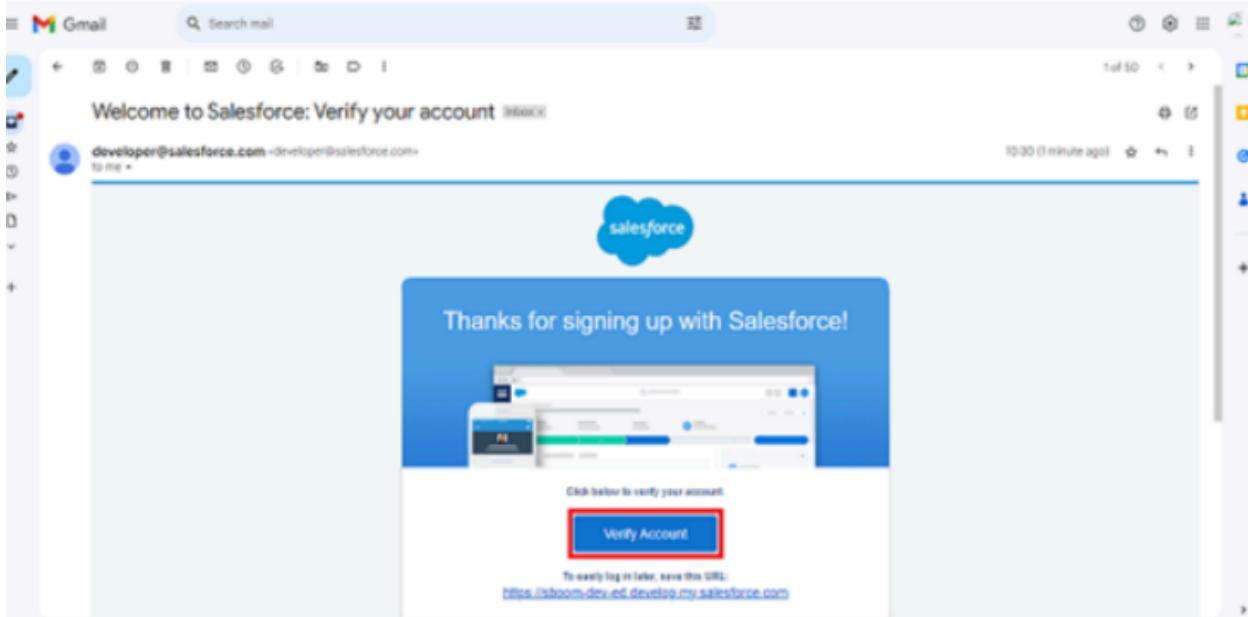
### Activity 1: Creating Developer Account

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



## Activity 2: Account Activation

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



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

## TASK 1

### Object

What Constitutes an Object? Database tables known as Salesforce objects let you store

information unique to a company.

Which kinds of items are there in Salesforce?

There are two kinds of Salesforce objects:

1. Standard Objects: Salesforce.com provides users, contracts, reports, dashboards, and other types of objects as standard objects.

2. Custom Objects: Objects generated by users are known as custom objects. They provide information that is special to them and vital to their business.

They serve as the center of every application and offer a framework for data sharing.

### **Activity 1:**

Create Employee Object To create an object:

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

### **Activity 2:**

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

To create an object:

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

### **Activity 3:**

Create 3 more objects with label names as ProjectTask, Asset, Asset Service. By following activity-2 steps, created 3 more objects.

### **Output of Task 1:**

Employee Object output:

The screenshot shows the Salesforce Object Manager interface. The URL in the browser is [sritatp4-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lQy000001Twkn/Details/view](https://sritatp4-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lQy000001Twkn/Details/view). The page title is "SETUP > OBJECT MANAGER Employee". On the left, a sidebar lists various object settings like Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main content area shows the "Details" tab for the "Employee" object. It includes fields for API Name (Employee\_\_c), Singular Label (Employee), Plural Label (Employees), and various configuration options like Enable Reports (checked), Track Activities, and Deployment Status (Deployed). Buttons for Edit and Delete are at the top right of the main form.

Project Object output:

The screenshot shows the Salesforce Setup interface for the 'Object Manager'. The left sidebar lists various configuration options: 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, and Restriction Rules. The main content area is titled 'Details' for the 'Project' object. It shows the following fields:

Field	Value
Description	
API Name	Project__c
Custom	✓
Singular Label	Project
Plural Label	Projects
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the bottom right of the details panel are 'Edit' and 'Delete' buttons.

## ProjectTask Objects:

The screenshot shows the Salesforce Setup interface for the 'Object Manager'. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, and Triggers. The main content area is titled 'Details' for the 'ProjectTask' object. It shows the following fields:

Field	Value
Description	
API Name	ProjectTask__c
Custom	✓
Singular Label	ProjectTask
Plural Label	ProjectTasks
Enable Reports	
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the bottom right of the details panel are 'Edit' and 'Delete' buttons.

## Asset object :

## Task 2:

### Tabs:

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

### Tab Types:

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

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

To create a Tab:(Employee)

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

### Activity 2: Creating a Custom Tab (Project)

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

### Activity 3:Creating tabs for remaining objects

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

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

## Output:

The screenshot shows the Salesforce Setup interface with the URL [sritatp4-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home](https://sritatp4-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home). The left sidebar is collapsed, showing sections like Feature Settings, Analytics, Reports & Dashboards, Access Policies, Historical Trending, Report Types, Reporting Snapshots, Reports and Dashboards, and Settings. A search bar at the top right contains the text 'das'. The main content area is titled 'Custom Tabs' and includes a sub-header 'Custom Object Tabs'. It lists several tabs with their actions (Edit | Del) and labels (Assets, Asset Services, Employees, Projects, ProjectTasks). Each tab is associated with a 'Tab Style' icon: Bell (red), Balls (brown), Airplane (teal), Alarm clock (purple), and Apple (yellow). Below this section are 'Web Tabs' and 'Visualforce Tabs' sections, both currently empty.

## The Lightning App:

### Activity 1: Create a Lightning App

To create a lightning app page:

Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.

Fill the app name in app details and branding as follow

App Name : Workforce Administrator Solution

Developer Name : this will auto populated

Description : Give a meaningful description

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

Primarycolor hex value : keep this default

Then click Next → (App option page) keep it as default → Next → (Utility Items) keep

it as default - → Next.

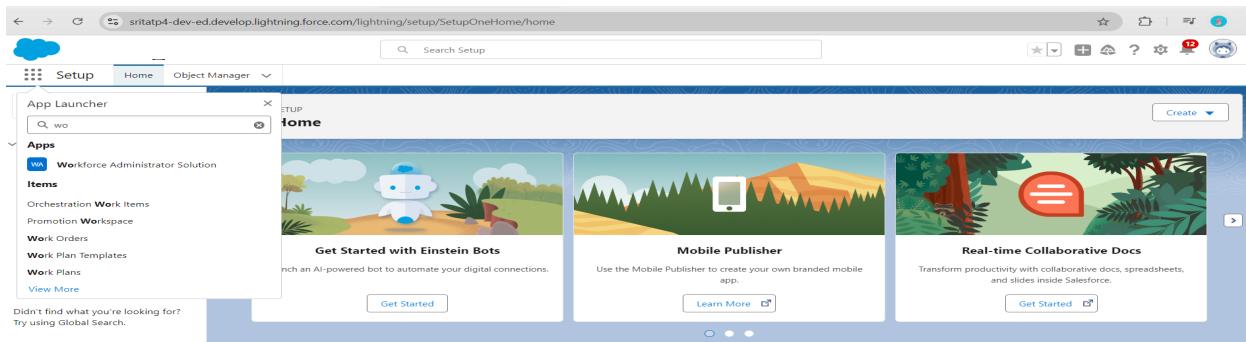
To Add Navigation Items:

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

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

To Add User Profiles:

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



## Fields & Relationships

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

Types of Fields

1. Standard Fields
2. Custom Fields

Use Case

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

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

To create fields in an object:

1. Go to setup - → click on Object Manager - → type object name(Employee) in quick find bar - → click on the object.

2. Now click on "Fields& Relationships" - → New

3. Select Data type as "Text".

4. Click on Next

5. Fill the above as following:

a. Field Label: Employee Name

b. Length : 18

c. Field Name : gets auto generated

d. Click on Next - → Next - → Save and new.

### Activity 2 :Creating Date of Birth Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1

2. Select Data type as "Date" and click Next.
3. Click on Next.
4. Fill the above as following: a. Field Label: Date of Birth. b. Field Name : gets auto generated. c. Click on Next -> Next -> Save and new.

### **Activity 3 : Creating Formula Field in Employee Object**

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as "Formula" and click Next.
3. Give Field Label and FieldName as "Age" and select formula return type as "Number"and click next
4. Under Advanced Formula write down the formula and click "Check Syntax" and Next -> Next-> Save & New.

### **Activity 4 : Creating Picklist Field in Employee Object**

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

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

Field in Employee Object

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

### **Activity 6 :Creating Master-Detail Relationship between Employee & Asset Object**

To Create a Master-Detail relationship

1. Go to the setup page -> click on object manager -> type object name(ProjectTask) in the quick find bar -> clickon the object.
2. Click on fields& relationship -> click on New.
3. Select "Master-Detail relationship" as data type and click Next.
4. For field label related to: select "Employee" object and click Next.
5. Give Field Label as "Employee Name" and click Next. Next -> Next -> Save & New.

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

Object

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

#### **Outputs:**

Fields in Employee object:

Fields & Relationships				
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	CreatedBy	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)		

Fields & Relationships				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Login Time	Login_Time__c	Time		
Logout Time	Logout_Time__c	Time		
Mode of Work	Mode_of_Work__c	Picklist		
Owner	OwnerId	Lookup(User,Group)		
Phone no	Phone_no__c	Phone		
Qualification	Qualification__c	Text(18)		
Record Type	RecordTypeid	Record Type		
Reports to	Reports_to__c	Lookup(Employee)		
Wifi Allowance Amount	Wifi_Allowance_Amount__c	Currency(18, 0)		
Wifi Allowances	Wifi_Allowances__c	Checkbox		

## Fields in Project Task object:

ProjectTask

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Employee Name	Employee_Name__c	Master-Detail(Employee)	✓	▼
Finishes in	Finishes_in__c	Formula (Number)		▼
Last Modified By	LastModifiedById	Lookup(User)		▼
Project Task	Project_Task__c	Master-Detail(Project)	✓	▼
ProjectTask Name	Name	Text(80)	✓	▼
Working Hours	Working_Hours__c	Number(18, 0)		▼

## Fields in Asset and Asset service:

Asset

FIELD NAME	API NAME	DATA TYPE	DESCRIPTION
Description			
Enable Reports			
Track Activities			
Track Field History			
Deployment Status			
Deployed			
Help Settings			
Standard salesforce.com Help Window			

The screenshot shows the Salesforce Object Manager interface for the 'Asset Service' object. The left sidebar contains navigation links for Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, and Scoping Rules. The main 'Details' tab displays the following configuration:

Setting	Value
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

At the top right, there are 'Edit' and 'Delete' buttons.

## Fields in Project Object:

The screenshot shows the Salesforce Object Manager interface for the 'Project' object. The left sidebar contains navigation links for 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, and Restriction Rules. The main 'Details' tab displays the following configuration:

Setting	Value
Description	
API Name	Project__c
Custom	✓
Singular Label	Project
Plural Label	Projects
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the top right, there are 'Edit' and 'Delete' buttons.

## Setting OWD

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

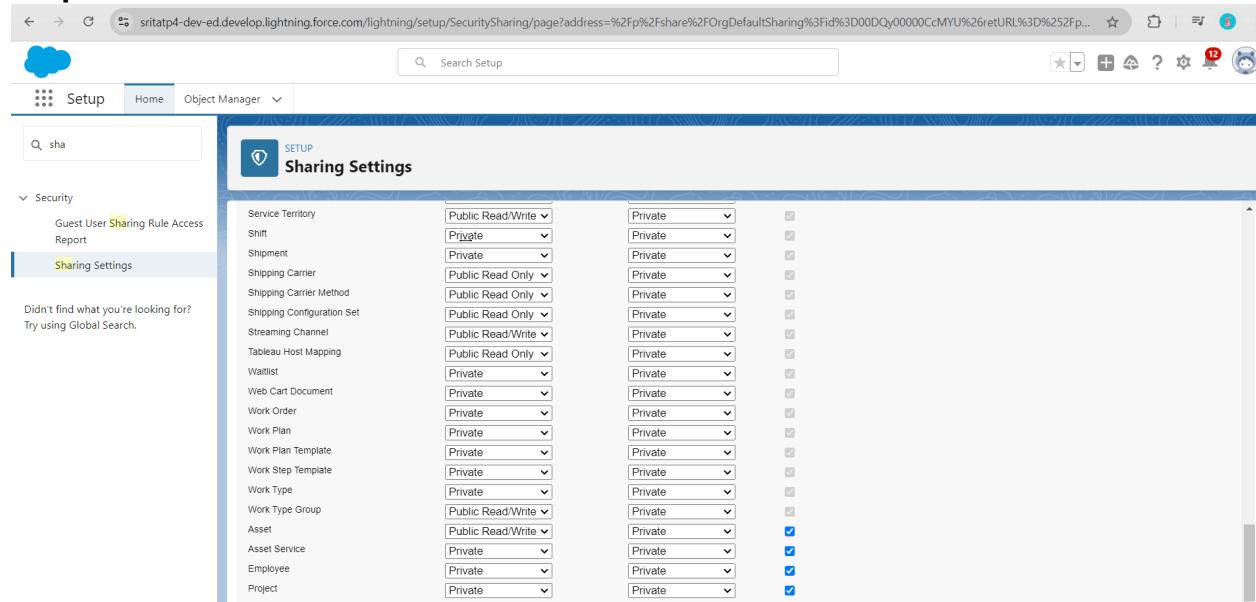
## **Activity 1: Create OWD Setting**

1. Go to Set Up → in the Quick Find box type "Sharing Settings" → click on it.
2. Click Edit in the Organization-Wide Defaults area.
3. Search for the Employee object.
4. Under default internal access and default external access change the options to "Private" and under grant access using hierarchies select the check box.
5. Click on save. This Setting is for all the Users Which have been Created.

## **Activity 2:**

Set OWD as Private for Project and Asset Service objects

### **Output :**



The screenshot shows the Salesforce Sharing Settings page. The left sidebar has a 'Sharing' section with 'Sharing Rule Access' and 'Sharing Settings' selected. The main area is titled 'Sharing Settings' and lists various objects with their sharing rules. The 'Asset Service' object is highlighted, showing its sharing rule details. The sharing rule for 'Asset Service' is set to 'Private' for both internal and external access, and the 'Grant Access Using Hierarchies' checkbox is checked.

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

## **User Adoption :**

### **Activity 1: Create a Record (Employee)**

1. Click on App Launcher on the left side of the screen.
2. Search Employee Management System & click on it.
3. Click on the Employee tab.
4. Click New.
5. Fill the Details and click on Save.

### **Activity 2: View a Record(Employee)**

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

### **Activity 3: Delete a Record (Employee)**

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

## Import Data

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

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

### Activity-1: Importing data using Data Wizard

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

### Output:

The screenshot shows the Bulk Data Load Jobs page in the Salesforce Setup. The job ID is 750Qy00000AE6cT. The job details table includes the following information:

Job ID	Submitted By	Job Type	Status
750Qy00000AE6cT	Geetha Malisetty	Operation Insert	Closed
Start Time	27/09/2024, 5:21 pm IST	Queued Batches	Total Processing Time (ms)
End Time	27/09/2024, 5:21 pm IST	In Progress Batches	API Active Processing Time (ms)
Time to Complete ([hh:]mm:ss)	00:01	Completed Batches	Apex Processing Time (ms)
Object	Employee	Failed Batches	
External ID Field		Progress	
Content Type	CSV	Records Processed	
Concurrency Mode	Parallel	Records Failed	
API Version	61.0	Retries	

## Profiles

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

1. Standard profiles: By default salesforce provides below standard profiles.
  - a. Contract Manager
  - b. Read Only
  - c. Marketing User
  - d. Solutions Manager
  - e. Standard User
  - f. System Administrator.
2. Custom Profiles: Custom ones defined by us. They can be deleted if there are no users assigned with that particular one.

## Activity 1: HR Profile

To create a new profile:

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

## Activity 2: Manager Profile

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

## Activity 3: Create Employee Profile

Create Employee Profiles for “On Site Employee”, “Remote Employee” as in Activity 2, but in step 3 only allow permission access for Project and Project 20 Task objects only.

## Output of Profiles:

The screenshot shows the Salesforce Setup interface with the URL [sritatp4-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eQy000007TWx9](https://sritatp4-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eQy000007TWx9). The page is titled 'Profiles'. In the 'Profile Detail' section, the profile is named 'Custom: Marketing Profile' with a 'User License' of 'Salesforce'. The 'Description' field is empty, and 'Created By' is listed as 'Geetha Malisetty, 27/09/2024, 7:52 am'. The 'Modified By' field is also 'Geetha Malisetty, 27/09/2024, 3:41 pm'. In the 'Page Layouts' section, various standard object layouts are assigned to different profiles, such as 'Global' layout for 'Email Application' and 'Macro' layout for 'Object Milestone'.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The 'Manager' profile is displayed. The 'Profile Detail' section shows the profile name is 'Manager', user license is 'Salesforce Platform', and it is a 'Custom Profile'. The 'Page Layouts' section shows standard object layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, etc., with specific layouts assigned.

This screenshot shows the 'Custom: Support Profile' in the Profiles Manager. The profile details include the name 'Custom: Support Profile', user license 'Salesforce', and created by 'Geetha.Malisetty'. The 'Page Layouts' section lists various standard object layouts for objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, etc., with specific layouts assigned.

This screenshot shows the 'Remote Employee' profile in the Profiles Manager. The profile details include the name 'Remote Employee', user license 'Salesforce Platform', and created by 'BESHMA.PYAPALI'. The 'Page Layouts' section lists various standard object layouts for objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, etc., with specific layouts assigned.

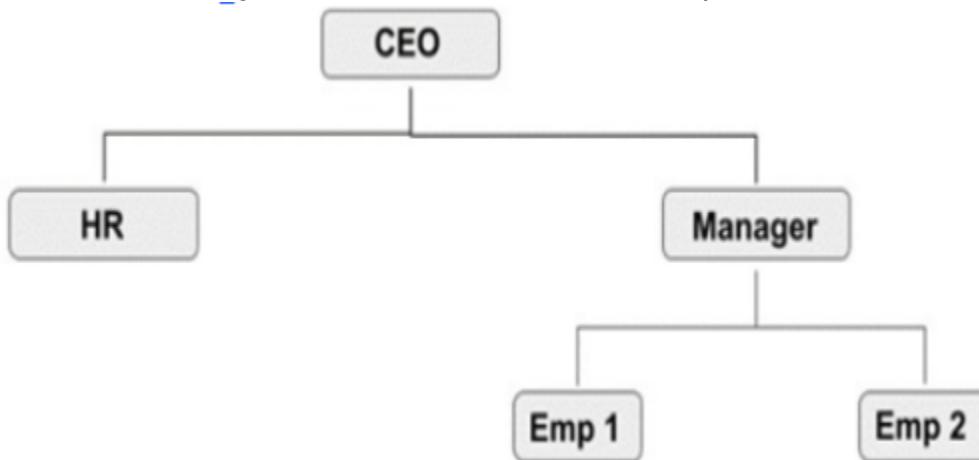
## Roles

A role in Salesforce defines a user's visibility access at the record level. Roles may be

used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

### Activity 1: Creating HR Role

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



### Activity 2:

Creating more roles Create three more roles for Manager, On Site Employee, Remote Employee Note: On Site Employee and Remote Employee reports to Manager. 23

Outputs: Creating HR role, Manager role, Onsite, Rempte employee

Action	Full Name	Alias	Username	Active
Edit	Niklaus Mikaelson	omika	22495a0406@srit.ac.in	<input checked="" type="checkbox"/>

Setup | Home | Object Manager | Search Setup | Help for this Page

## Role MANAGER

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

Hierarchy: srt > CEO > MANAGER  
Siblings: SVP\_Sales & Marketing, SVP\_Customer Service & Support, CFO, SVP\_Human Resources, COO, HR

[Users in MANAGER Role \(1\)](#)

Action	Full Name	Alias	Username	Active
Edit	Kol Mikelson	kmika	224g5a04067@srt.ac.in	✓

**Role Detail**

Label	MANAGER	Role Name	MANAGER
This role reports to	CEO	Role Name as displayed on reports	
Modified By	Geetha Malisetty, 27/09/2024, 12:42 pm	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

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

Setup | Home | Object Manager | Search Setup | Help for this Page

## Role ON SITE

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

Hierarchy: srt > CEO > MANAGER > ON SITE  
Siblings: REMOTE

[Users in ON SITE Role \(1\)](#)

Action	Full Name	Alias	Username	Active
Edit	kil_bill	kbil	kibil@gmail.com	✓

**Role Detail**

Label	ON SITE	Role Name	ON_SITE
This role reports to	MANAGER	Role Name as displayed on reports	
Modified By	Geetha Malisetty, 27/09/2024, 12:43 pm	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

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

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with categories like Users, Feature Settings, Sales, Service, and Case Teams. Under 'Users', 'Roles' is selected. The main content area is titled 'REMOTE'. It shows the role details: Label: REMOTE, This role reports to: MANAGER, Modified By: Geetha Malisetty, Opportunity Access: Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities; Case Access: Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases. Below this is a table titled 'Users in REMOTE Role' with one row for 'chim cahm'. At the bottom right of the main content area, there's a link 'Users in REMOTE Role Help'.

## Users

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

### Activity 1: Create User

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

### Activity 2: Creating another user

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

### Activity 3: Creating more users

Create two more users as we created in activity 2. 26

### Output users:

http://sritatp4-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005Qy000007v8pd%3Fnoredirect%3D1%26isUserEntityOverride%3D1

User Detail for Koi Mikaelson

Name: Koi Mikaelson  
Alias: kmika  
Email: 2245a0406@srit.ac.in [Verify] [\[Edit\]](#)  
Username: 2245a0406@srit.ac.in  
Nickname: User17274214195305768760 [\[Edit\]](#)  
Title: [\[Edit\]](#)  
Company: [\[Edit\]](#)  
Department: [\[Edit\]](#)  
Division: [\[Edit\]](#)  
Address: [\[Edit\]](#)  
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)  
Locale: English (India)  
Language: English  
Delegated Approver: Manager [\[Edit\]](#)  
Receive Approval Request Emails: Only if I am an approver  
Federation ID: [\[Edit\]](#)

Role: MANAGER  
User License: Salesforce Platform  
Profile: Manager  
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: [View](#)  
Data.com User Type: [\[Edit\]](#)  
Accessibility Mode (Classic Only):  [\[Edit\]](#)  
Debug Mode:  [\[Edit\]](#)  
High-Contrast Palette on Charts:  [\[Edit\]](#)

http://sritatp4-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005Qy000007v8FR%3Fnoredirect%3D1%26isUserEntityOverride%3D1

User Detail for chim cahm

Name: chim cahm  
Alias: ccahm  
Email: chimcham@gmail.com [Verify] [\[Edit\]](#)  
Username: chimcham@gmail.com  
Nickname: User17274217144776102424 [\[Edit\]](#)  
Title: [\[Edit\]](#)  
Company: [\[Edit\]](#)  
Department: [\[Edit\]](#)  
Division: [\[Edit\]](#)  
Address: [\[Edit\]](#)  
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)  
Locale: English (India)  
Language: English  
Delegated Approver: Manager [\[Edit\]](#)  
Receive Approval Request Emails: Only if I am an approver  
Federation ID: [\[Edit\]](#)

Role: REMOTE  
User License: Salesforce Platform  
Profile: Standard Platform User  
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: [View](#)  
Data.com User Type: [\[Edit\]](#)  
Accessibility Mode (Classic Only):  [\[Edit\]](#)  
Debug Mode:  [\[Edit\]](#)  
High-Contrast Palette on Charts:  [\[Edit\]](#)

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** sritatp4-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005Qy000007v7pd%3Fnoredirect%3D1%26isUserEntityOverride%3D1
- Setup Tab:** The main tab is "SETUP". Other tabs include "Home" and "Object Manager".
- Search Bar:** "Search Setup" with a magnifying glass icon.
- Left Sidebar:**
  - Users:** "Permission Set Groups", "Permission Sets", "Profiles", "Public Groups", "Queues", "Roles", "User Management Settings" (highlighted), "Users", "Feature Settings", "Data.com" (with "Prospector Users"), "Service", "Embedded Service" (with "Messaging for In-App and Web User Verification"), and "User Interface".
  - User Detail:** Shows "User kil bil" with fields like Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, Role (ON SITE), User License (Salesforce Platform), Profile (Standard Platform User), Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations (View), Data.com User Type (View), Accessibility Mode (Classic Only), Debug Mode, and High-Contrast Palette on Charts.

## Page layouts

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

### Activity 1 : creating a page layout for Employee object

To Create a Page layout:

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

**Output:**

## Activity 2 : Creating another page layout

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

### Output:

## Chatter Group

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

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

To Create a chattergroup:

1. Click the App Launcher.

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

#### **Output:**

#### **Record Types**

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

#### **Activity 1: Creating On Site EmployeeRecord 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 checkfor the Manager& System Administrator profile and click on Next.
6. Select "Apply a different layoutfor each profile", and change page layout to On Site

Employee Layout for manager profile and System Administrator. click Save.

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

Create another Record Type with name "RemoteEmployee" following the step from activity1. Note: use Remote Employee page layout for Remote Employee record type.

### Permission sets

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

### Activity 1: Creating a permission set

To Create a Permission Set:

1. Go to setup → type "permission sets" in quick search → select permission sets → New.
2. Enter the label name as "Per to Emp" → Save.
3. Under Apps Select object settings.
4. Click on Employee object → click on Edit → under object permission check for read and create.
5. Click on Save.
6. After saving the permission click on the Manage assignment
7. Now click on the Manage Assignment.
8. Click on Add Assignment.
9. Now select the users (any one user with the profile "On Site Employee") and click on Next.

10. Click on Assign and Done

### Output:

The screenshot shows the Salesforce Setup interface. The user is creating a new Permission Set named "Per to Emp". The "Permission Set Overview" section includes fields for Description, License, Session Activation Required, and Permission Set Groups Added To. The "API Name" is set to "Per\_to\_Emp" and the "Namespace Prefix" is "Geetha.Maisetty". The "Created By" and "Last Modified By" fields show "Geetha Maisetty" with the timestamp "27/09/2024, 1:19 pm". The "Apps" section lists several settings: "Assigned Apps", "Assigned Connected Apps", "Object Settings", "App Permissions", "Apex Class Access", and "Visualforce Page Access".

## REPORTS

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

reporting basics.

## Types of Reports in Salesforce

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

### Activity 1: Create Report

To Create a Report:

1. Go to the app → click on the report stab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel → click on start report.
4. Customize your report → Add fields from left pane as shown below Save or run it.

**Output:**

The screenshot shows the Salesforce Lightning interface with the following details:

- Page Header:** Workforce Administ..., Employees, Projects, ProjectTasks, Assets, Asset Services, Reports (selected), Dashboards, Internal Discussion, Recently Viewed, Groups.
- Report Title:** Report: Employees  
New Employees Report
- Report Summary:** Total Records: 28, Total Cab Allowance: ₹14,000, Total Cab Allowance Amount: ₹14,000, Total Food Allowances: 14, Total Food Allowance Amount: ₹14,000, Total Wifi Allowances: 14, Total Wifi Allowance Amount: ₹7,000.
- Report Data:** A table listing 15 employees with columns: Employee: Employee ID, Employee Name, Employee: ID, Email, Gender, Login Time, Logout Time, Mode of Work, LinkedIn Profile, Cab Allowance, and Cab Allowance Amo. Each row includes a checkbox in the Cab Allowance column and a LinkedIn profile link in the LinkedIn Profile column.

	Employee: Employee ID	Employee Name	Employee: ID	Email	Gender	Login Time	Logout Time	Mode of Work	LinkedIn Profile	Cab Allowance	Cab Allowance Amo
1	EMS-0002	Jackie Chan	a00Qy00000LN21t	jackie@abc.com	Male	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/jackie">https://www.linkedin.com/in/jackie</a>	<input checked="" type="checkbox"/>	₹1,0
2	EMS-0003	James	a00Qy00000LN21u	james@abc.com	Male	-	-	Remote	<a href="https://www.linkedin.com/in/james">https://www.linkedin.com/in/james</a>	<input type="checkbox"/>	
3	EMS-0004	Benjamin	a00Qy00000LN21v	benjamin@abc.com	Male	-	-	Remote	<a href="https://www.linkedin.com/in/benjamin">https://www.linkedin.com/in/benjamin</a>	<input type="checkbox"/>	
4	EMS-0005	Alexander	a00Qy00000LN21w	alex@abc.com	Male	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/alex">https://www.linkedin.com/in/alex</a>	<input checked="" type="checkbox"/>	₹1,0
5	EMS-0006	William	a00Qy00000LN21x	william@abc.com	Male	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/william">https://www.linkedin.com/in/william</a>	<input checked="" type="checkbox"/>	₹1,0
6	EMS-0007	Ethan	a00Qy00000LN21y	ethan@abc.com	Male	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/ethan">https://www.linkedin.com/in/ethan</a>	<input checked="" type="checkbox"/>	₹1,0
7	EMS-0008	Emma	a00Qy00000LN21z	emma@abc.com	Female	-	-	Remote	<a href="https://www.linkedin.com/in/emma">https://www.linkedin.com/in/emma</a>	<input type="checkbox"/>	
8	EMS-0009	Olivia	a00Qy00000LN220	olivia@abc.com	Female	-	-	Remote	<a href="https://www.linkedin.com/in/olivia">https://www.linkedin.com/in/olivia</a>	<input type="checkbox"/>	
9	EMS-0010	Sophia	a00Qy00000LN221	sophia@abc.com	Female	-	-	Remote	<a href="https://www.linkedin.com/in/sophia">https://www.linkedin.com/in/sophia</a>	<input type="checkbox"/>	
10	EMS-0011	Isabella	a00Qy00000LN222	isabella@abc.com	Female	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/isabella">https://www.linkedin.com/in/isabella</a>	<input checked="" type="checkbox"/>	₹1,0
11	EMS-0012	Amelia	a00Qy00000LN223	amelia@abc.com	Female	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/amelia">https://www.linkedin.com/in/amelia</a>	<input checked="" type="checkbox"/>	₹1,0
12	EMS-0013	Elizabeth	a00Qy00000LN224	elizabeth@abc.com	Female	-	-	Remote	<a href="https://www.linkedin.com/in/elizabeth">https://www.linkedin.com/in/elizabeth</a>	<input type="checkbox"/>	
13	EMS-0014	Scarlett	a00Qy00000LN225	scarlett@abc.com	Female	-	-	Remote	<a href="https://www.linkedin.com/in/scarlett">https://www.linkedin.com/in/scarlett</a>	<input type="checkbox"/>	
14	EMS-0015	Chloe	a00Qy00000LN226	chloe@abc.com	Female	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/chloe">https://www.linkedin.com/in/chloe</a>	<input checked="" type="checkbox"/>	₹1,0

### Activity 2: Create 2 more Reports

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

**Output:**

**Report: Assets with Employee Name**  
**Employees with Assets**

Total Records 9

	Asset: Asset Name	Asset: ID	Employee Name: Employee Name	Employee Name: Employee ID	Date Of Issue	Employee Name: Record ID	Employee Name: Mode of Work
1	Lenova	a03Qy0000007tLkj	Jackie Chan	EMS-0002	05/12/2012	a00Qy00000LN21t	On Site
2	HP	a03Qy000007tEED	Emma	EMS-0008	13/11/2020	a00Qy00000LN21z	Remote
3	HP	a03Qy000007txP	Emma	EMS-0008	13/11/2020	a00Qy00000LN21z	Remote
4	HP	a03Qy000007tLRB	Emma	EMS-0008	13/11/2020	a00Qy00000LN21z	Remote
5	Dell	a03Qy000007ssdG	Amelia	EMS-0012	19/09/2021	a00Qy00000LN223	On Site
6	Dell	a03Qy000007tHvY	Amelia	EMS-0012	19/09/2021	a00Qy00000LN223	On Site
7	Dell	a03Qy000007tLUP	Amelia	EMS-0012	19/09/2021	a00Qy00000LN223	On Site
8	Dell	a03Qy000007tLUQ	Amelia	EMS-0012	19/09/2021	a00Qy00000LN223	On Site
9	Dell	a03Qy000007tLZF	Amelia	EMS-0012	19/09/2021	a00Qy00000LN223	On Site

**Report: Employees with ProjectTasks and Projects**  
**Employees with ProjectTasks and Projects**

Total Records 5

	Employee: Employee ID	Employee Name	ProjectTask: ProjectTask Name	Project Task: Project ID	Joining date	Email	Experience	Mode of Work
1	EMS-0005	Alexander	Developing	Proj-0003	15/05/2021	alex@abc.com	2	On Site
2	EMS-0008	Emma	Monitoring	Proj-0004	13/11/2020	emma@abc.com	3	Remote
3	EMS-0013	Elizabeth	Testing	Proj-0001	27/02/2021	elizabeth@abc.com	2	Remote
4	EMS-0012	Amelia	Testing	Proj-0001	19/09/2021	amelia@abc.com	2	On Site
5	EMS-0002	Jackie Chan	Data analysing	Proj-0001	05/12/2012	jackie@abc.com	9	On Site

## Dashboards

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

### Activity 1: Create Dashboard

To Create a Dashboard

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

**Output:**

The screenshot shows a Salesforce Lightning interface with a top navigation bar and a main content area. The content area displays a table titled 'New Employees Report' with columns: Employee: Employee ID, Employee Name, Employee: ID, Email, Gender, Login Time, Logout Time, and LinkedIn Profile. The table lists eight employees (EMS-0002 to EMS-0009) with their respective details and LinkedIn links.

Employee: Employee ID	Employee Name	Employee: ID	Email	Gender	Login Time	Logout Time	LinkedIn Profile
EMS-0002	Jackie Chan	a00Qy00000LN21t	jackie@abc.com	Male	9:00 am	5:00 pm	<a href="https://www.linkedin.com/in/jackie">https://www.linkedin.com/in/jackie</a>
EMS-0003	James	a00Qy00000LN21u	james@abc.com	Male	-	-	<a href="https://www.linkedin.com/in/james">https://www.linkedin.com/in/james</a>
EMS-0004	Benjamin	a00Qy00000LN21v	benjamin@abc.com	Male	-	-	<a href="https://www.linkedin.com/in/benjamin">https://www.linkedin.com/in/benjamin</a>
EMS-0005	Alexander	a00Qy00000LN21w	alex@abc.com	Male	9:00 am	5:00 pm	<a href="https://www.linkedin.com/in/alex">https://www.linkedin.com/in/alex</a>
EMS-0006	William	a00Qy00000LN21x	william@abc.com	Male	9:00 am	5:00 pm	<a href="https://www.linkedin.com/in/william">https://www.linkedin.com/in/william</a>
EMS-0007	Ethan	a00Qy00000LN21y	ethan@abc.com	Male	9:00 am	5:00 pm	<a href="https://www.linkedin.com/in/ethan">https://www.linkedin.com/in/ethan</a>
EMS-0008	Emma	a00Qy00000LN21z	emma@abc.com	Female	-	-	<a href="https://www.linkedin.com/in/emma">https://www.linkedin.com/in/emma</a>

[View Report \(New Employees Report\)](#)

**Activity 2:**  
Create another Dashboard as we discussed in activity 1.  
**Output :**

The screenshot shows a second Salesforce Lightning dashboard titled 'Dashboard 2'. It displays a table titled 'Employees with ProjectTasks and Projects' with columns: Employee: Employee ID, Employee Name, ProjectTask: ProjectTask Name, Project Task: Project ID, Joining date, Email, and ProjectTask: Created By. The table lists five employees (EMS-0002, EMS-0005, EMS-0008, EMS-0012, EMS-0013) with their respective project tasks and details.

Employee: Employee ID	Employee Name	ProjectTask: ProjectTask Name	Project Task: Project ID	Joining date	Email	ProjectTask: Created By
EMS-0002	Jackie Chan	Data analysing	Proj-0001	05/12/2012	jackie@abc.com	Geetha Malisetty
EMS-0005	Alexander	Devoleping	Proj-0003	15/05/2021	alex@abc.com	Geetha Malisetty
EMS-0008	Emma	Monitoring	Proj-0004	13/11/2020	emma@abc.com	Geetha Malisetty
EMS-0012	Amelia	Testing	Proj-0001	19/09/2021	amelia@abc.com	Geetha Malisetty
EMS-0013	Elizabeth	Testing	Proj-0001	27/02/2021	elizabeth@abc.com	Geetha Malisetty

[View Report \(Employees with ProjectTasks and Projects\)](#)

## Challenges & Solutions

### Data Integration Challenges

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

### User Adoption

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

#### **Customization Complexity**

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

#### **Performance Tracking Difficulties**

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

#### **Security and Data Privacy**

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

## **Future Recommendations**

#### **Continuous Improvement**

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

#### **Integration with Other Tools**

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

#### **Mobile Access**

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

#### **Advanced Analytics**

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

#### **Community Building**

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

## **Conclusion**

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