Workforce Administration Solution (Admin)

By

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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

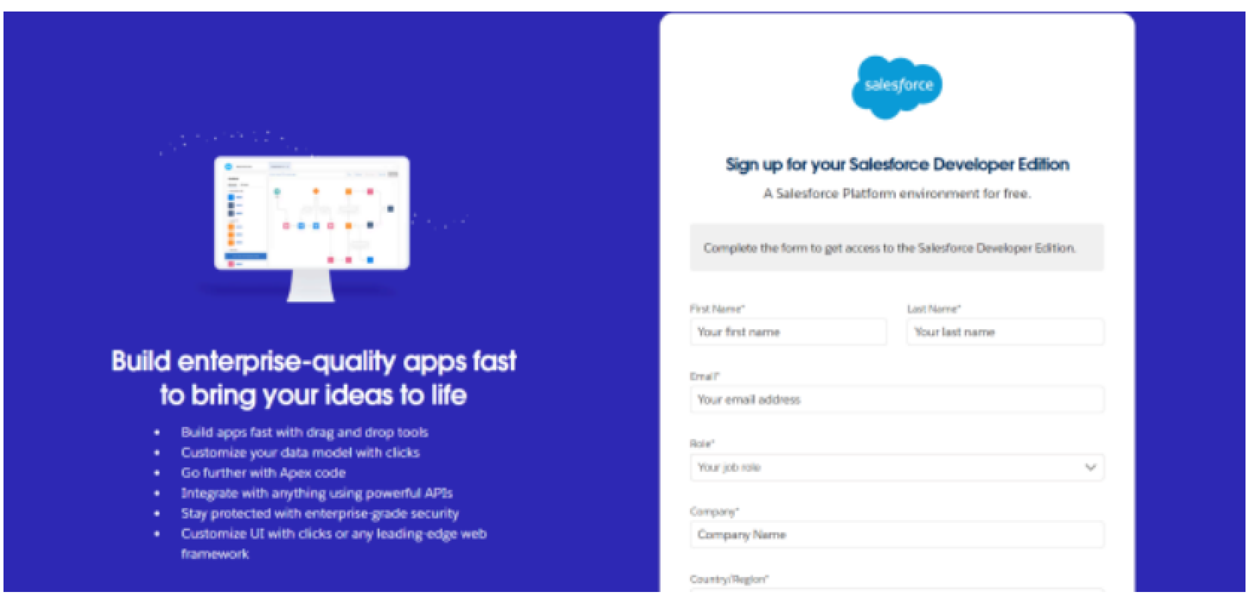
to projects and assets.
Automation: To automate processes like asset assignment and project updates, use technologies like Workflow Rules, Process Builder, and Flows.
Dashboards and Reports: Create reports to keep an eye on project advancement and staff performance.

Implementation Details

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

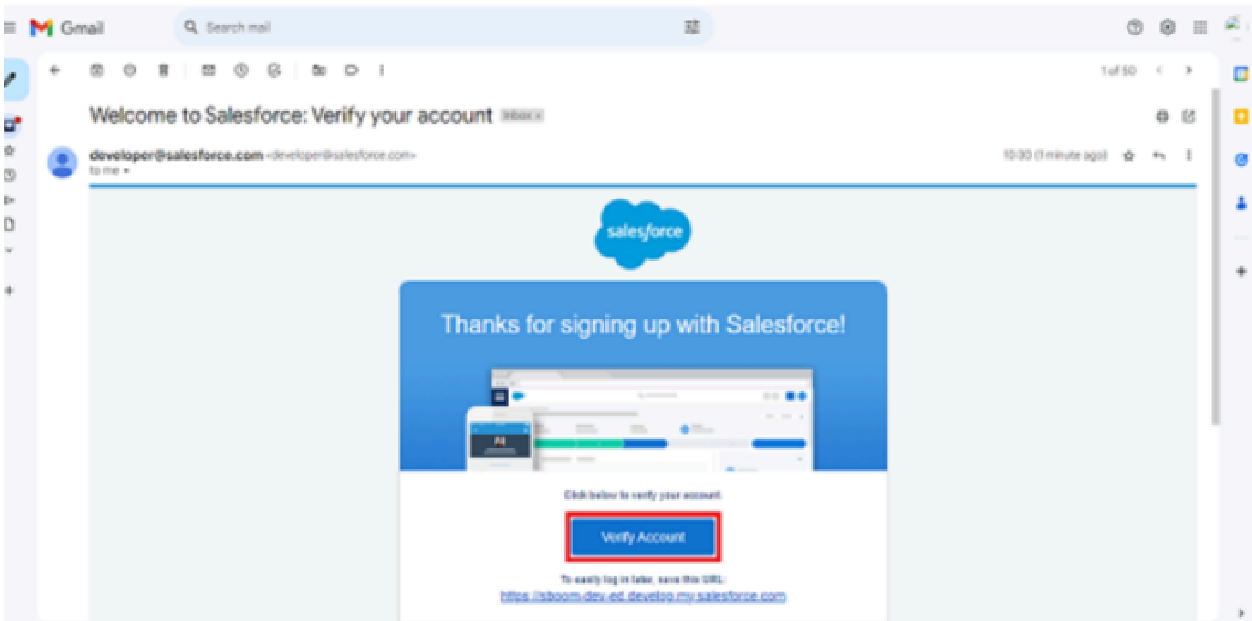
Activity 1: Creating Developer Account

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:

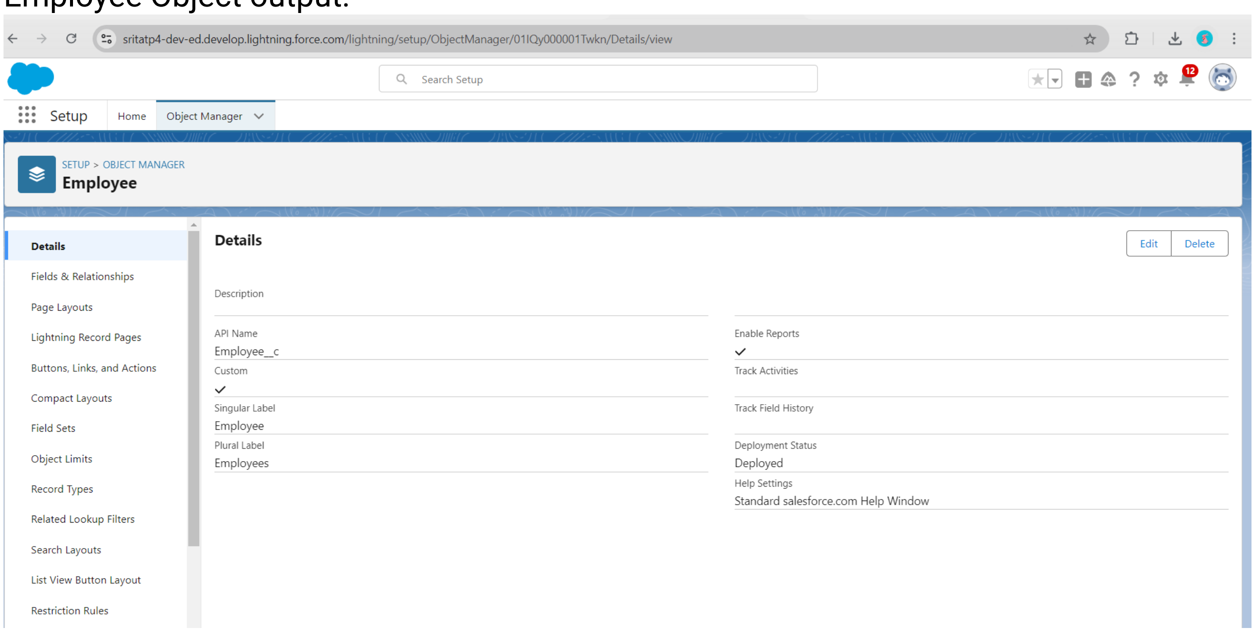
Create Project Object Having comprehensive data on the organization's ongoing and finished projects is the goal of developing a project object.
To create an object:
1. From the setup page --> Click on Object Manager --> Click on Create –-> Click on
2. Click on Allow reports,
3. Allow search --> Save

Activity 3:

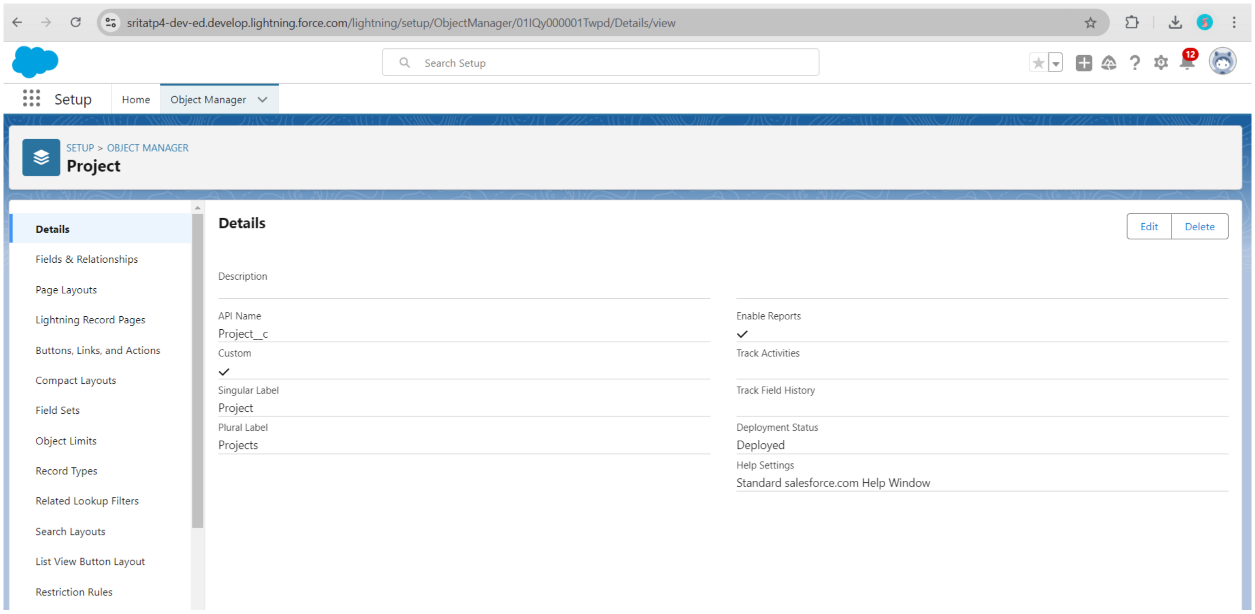
Create 3 more objects with label names as ProjectTask, Asset, Asset Service. By following activity-2 steps, created 3 more objects.

Output of Task 1:

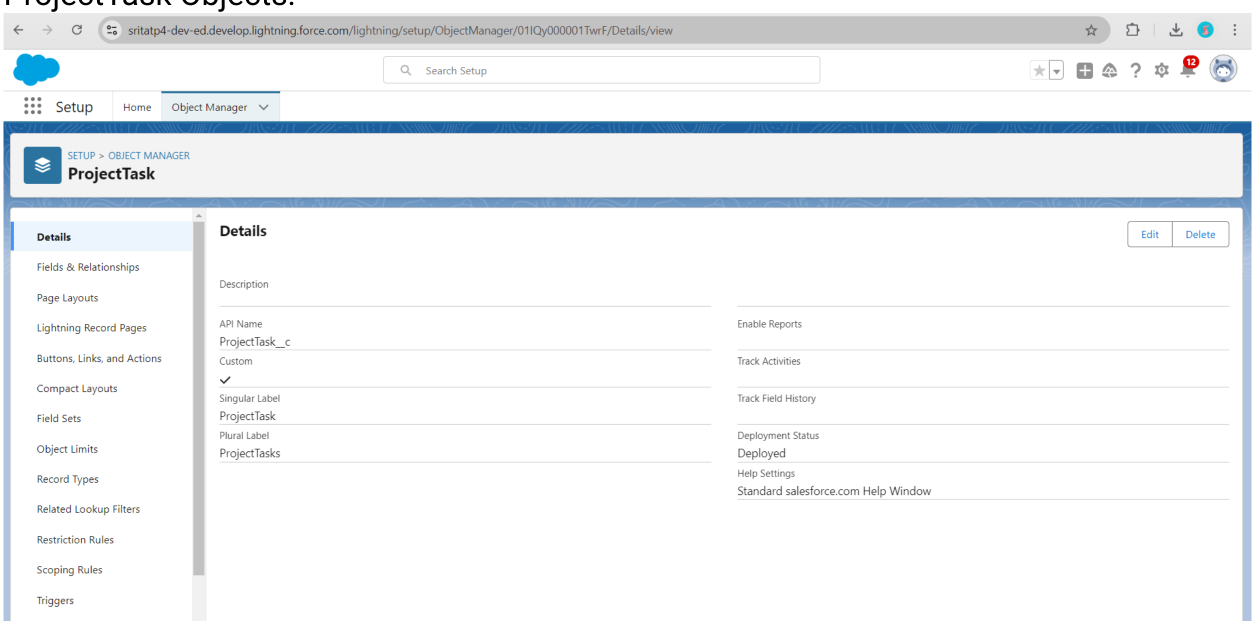
Employee Object output:



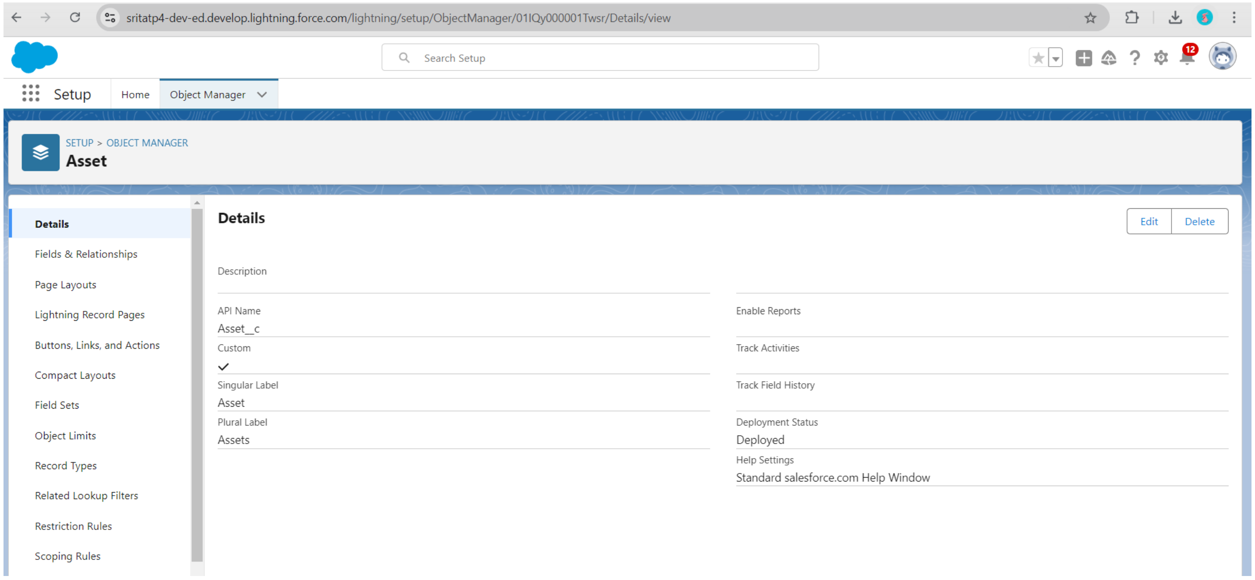
Project Object output:



ProjectTask Objects:



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)

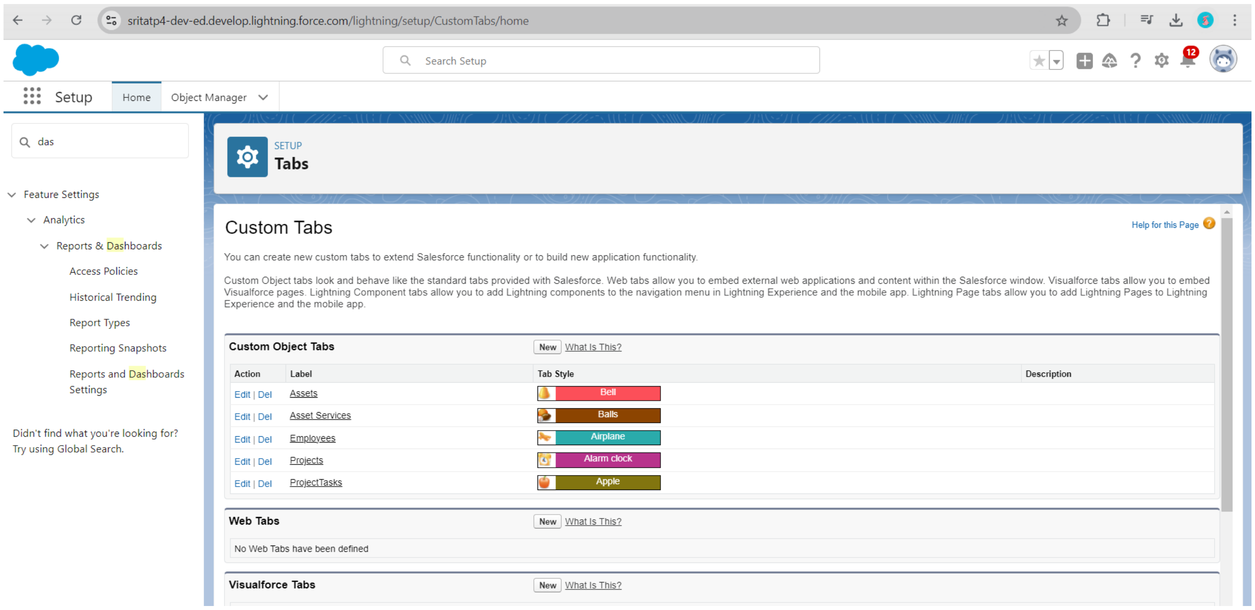
1. Go to setup page --> type Tabs in Quick Find bar --> click on tabs --> New (under custom object tab)
2. Select Object(Project) --> Select the tab style ?--> Next (Add to profiles page) keep it as default --> Next (Add to Custom App) keep it as default --> Save. Output

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:

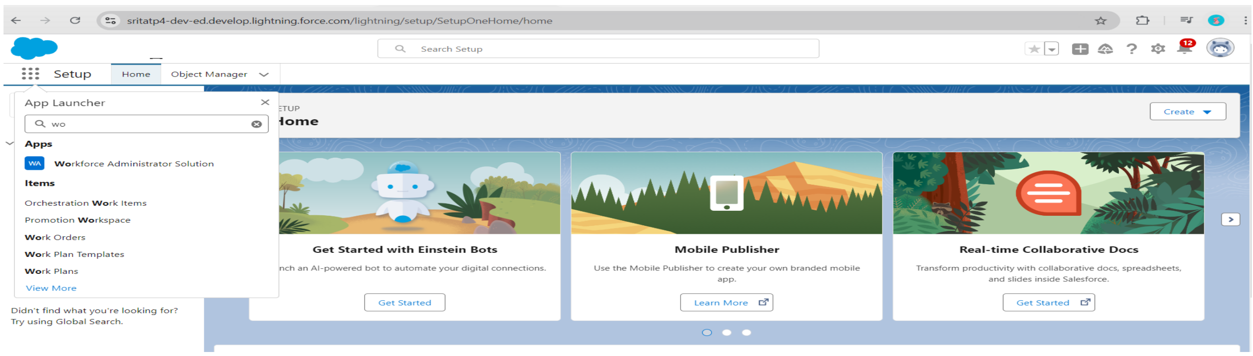


The Lightning App:

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.

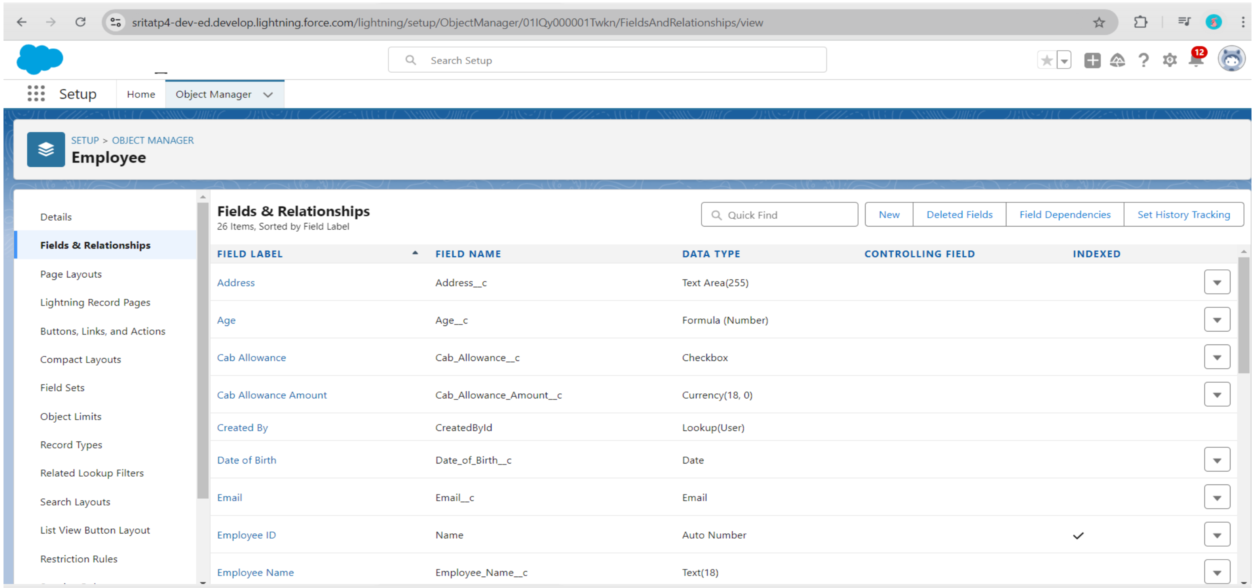
Activity 7 : Creating Remaining Fields in Employee

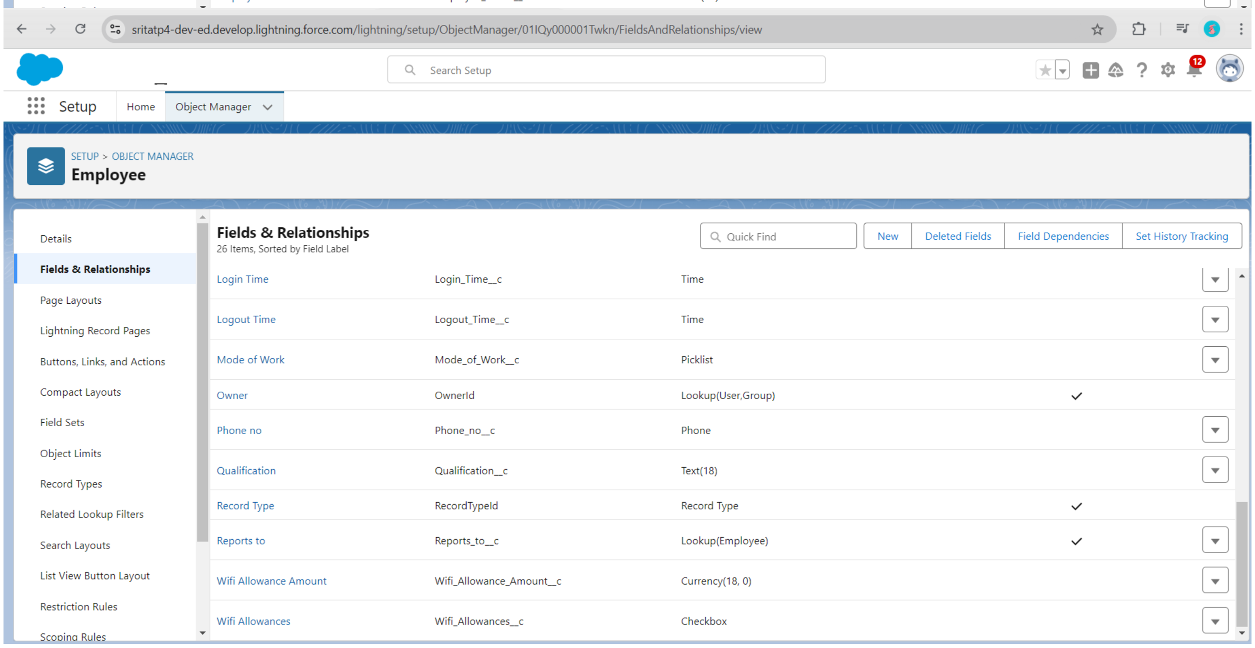
Object

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

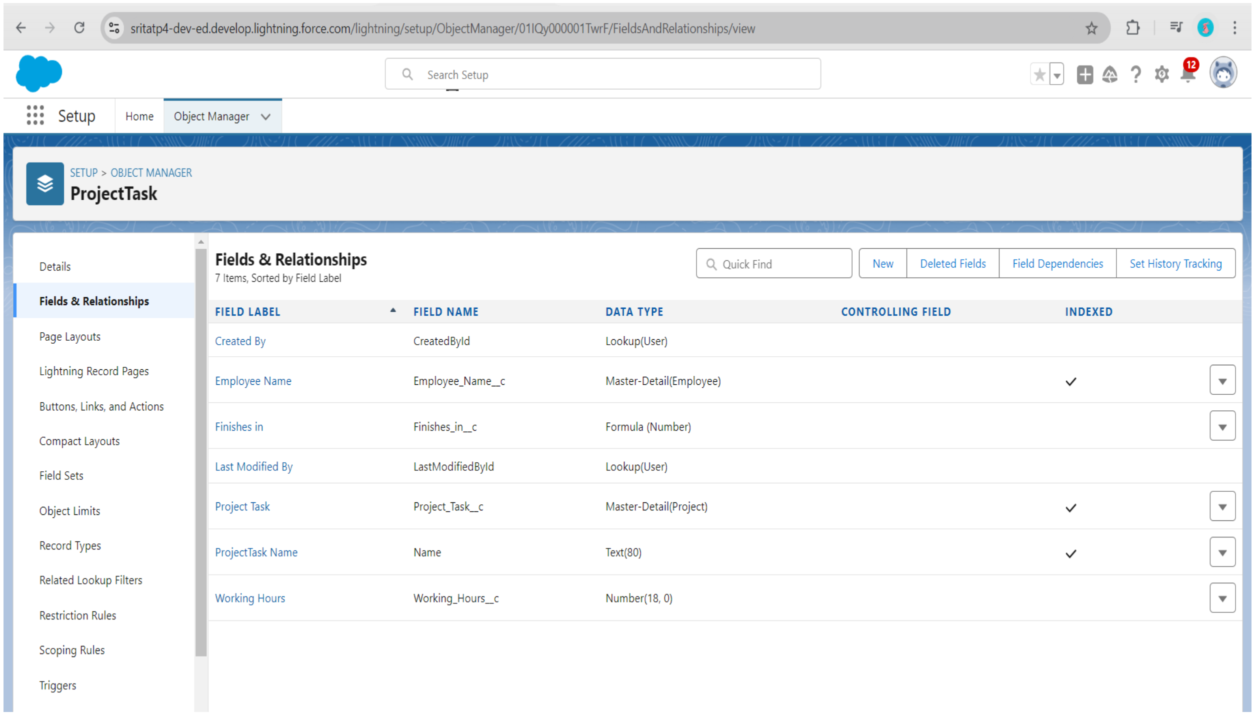
Outputs:

Fields in Employee object:

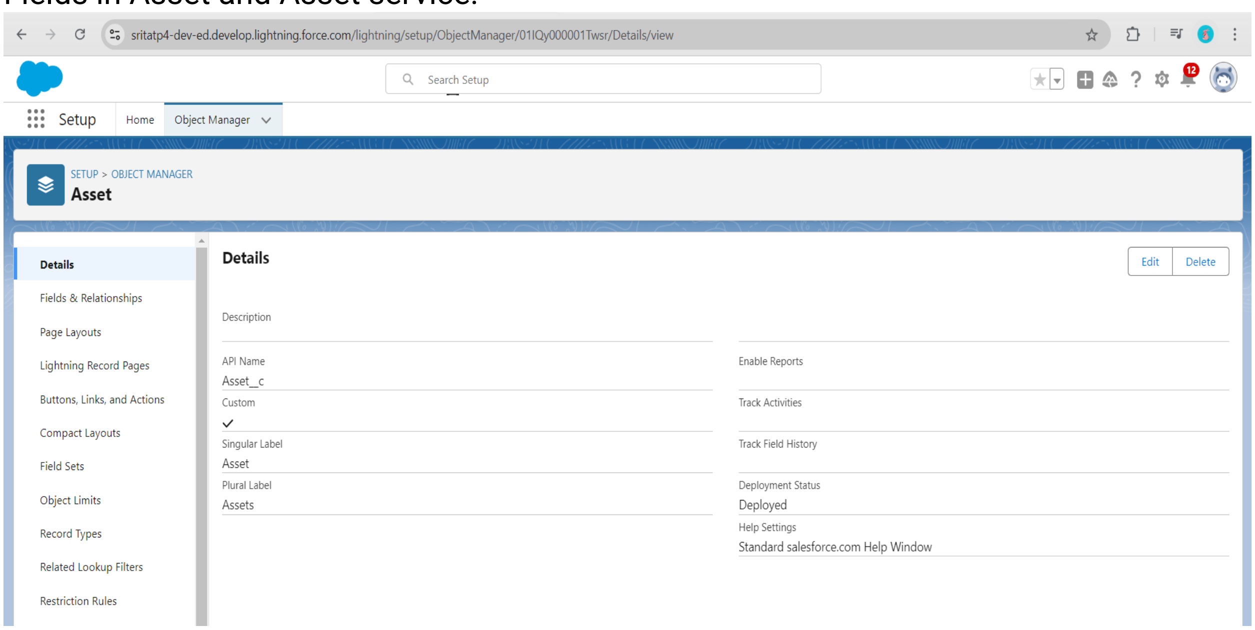


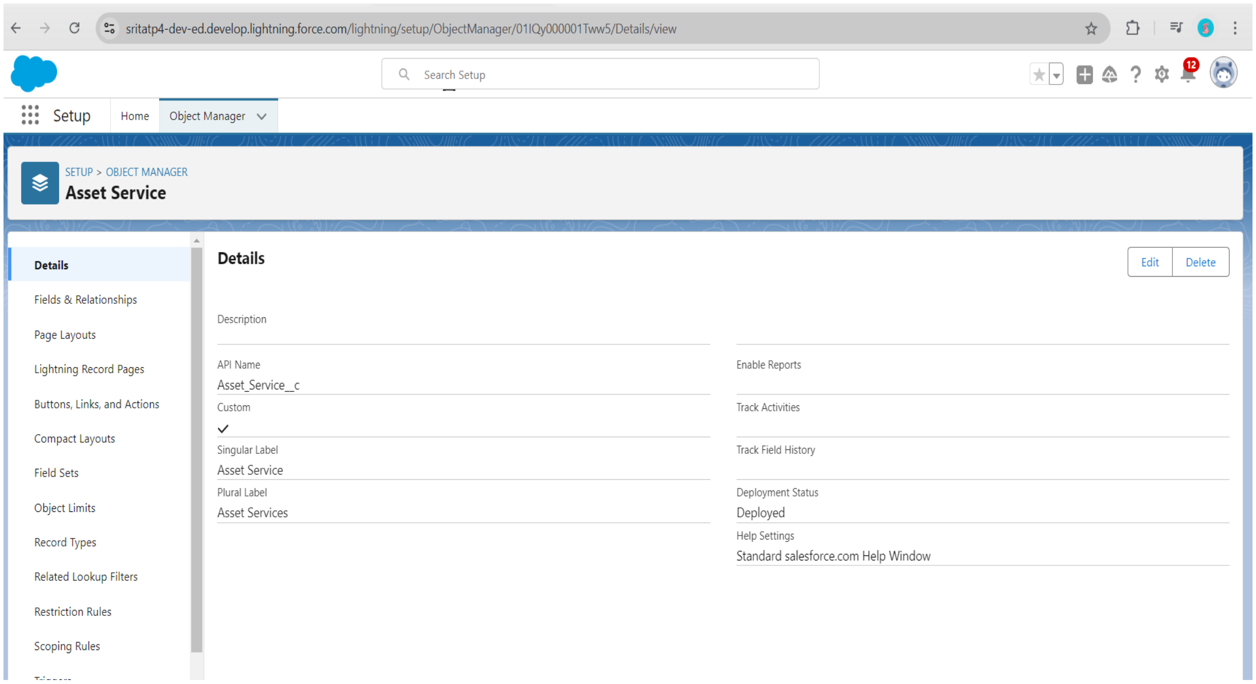


Fields in Project Task object:

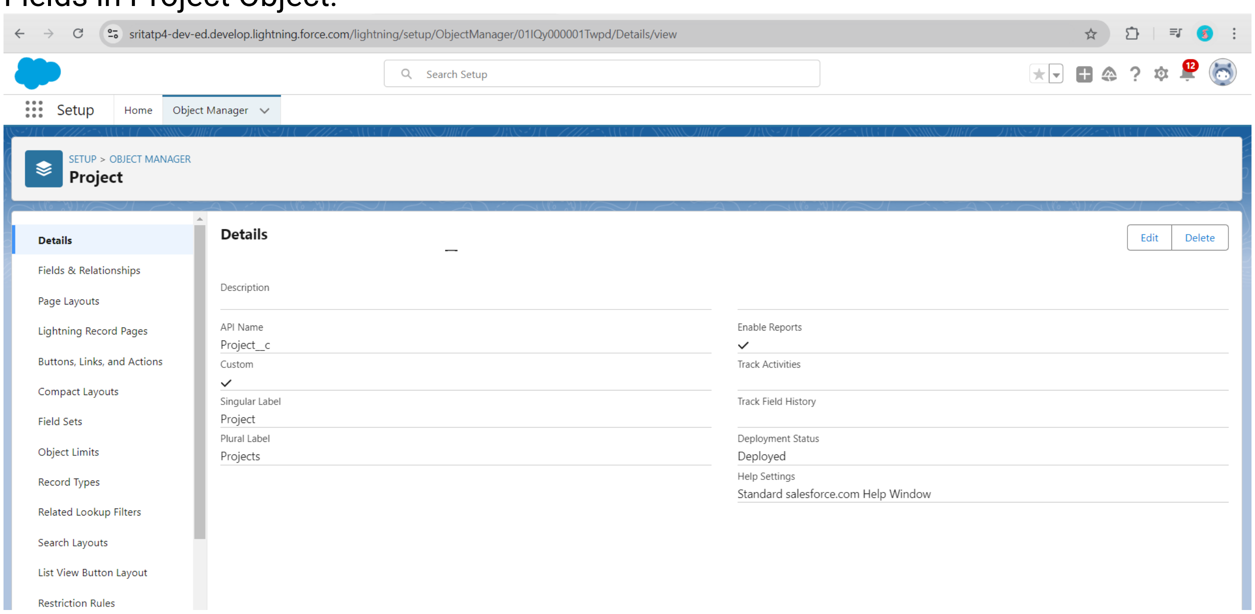


Fields in Asset and Asset service:





Fields in Project Object:



Setting OWD

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

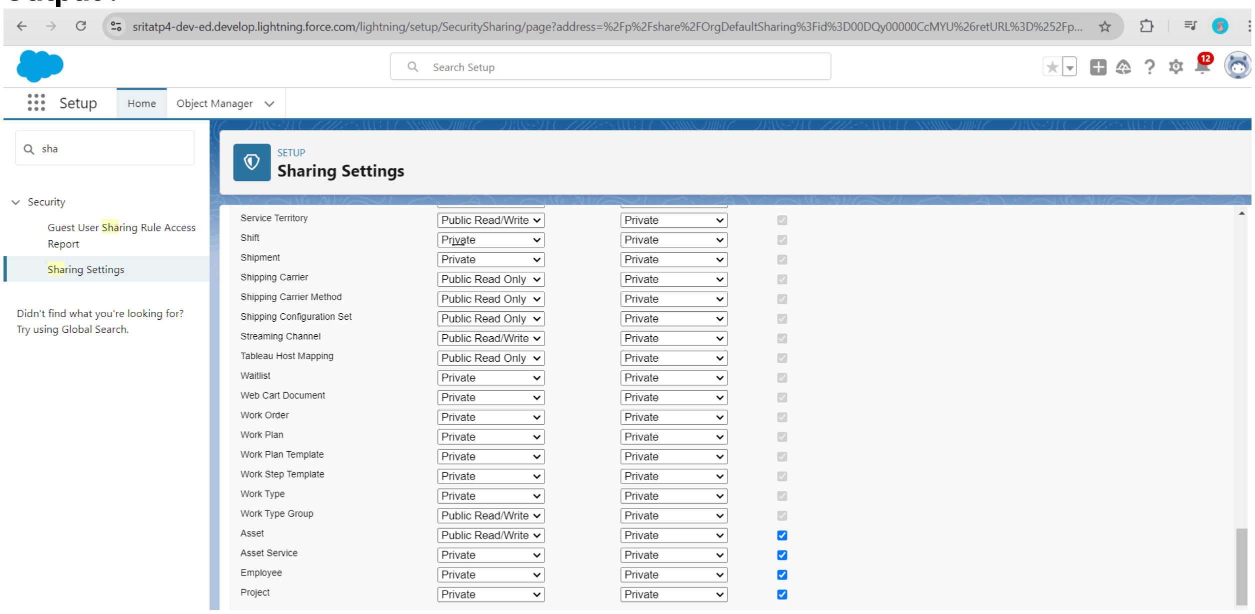
Activity 1: Create OWD Setting

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 changethe 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 :



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

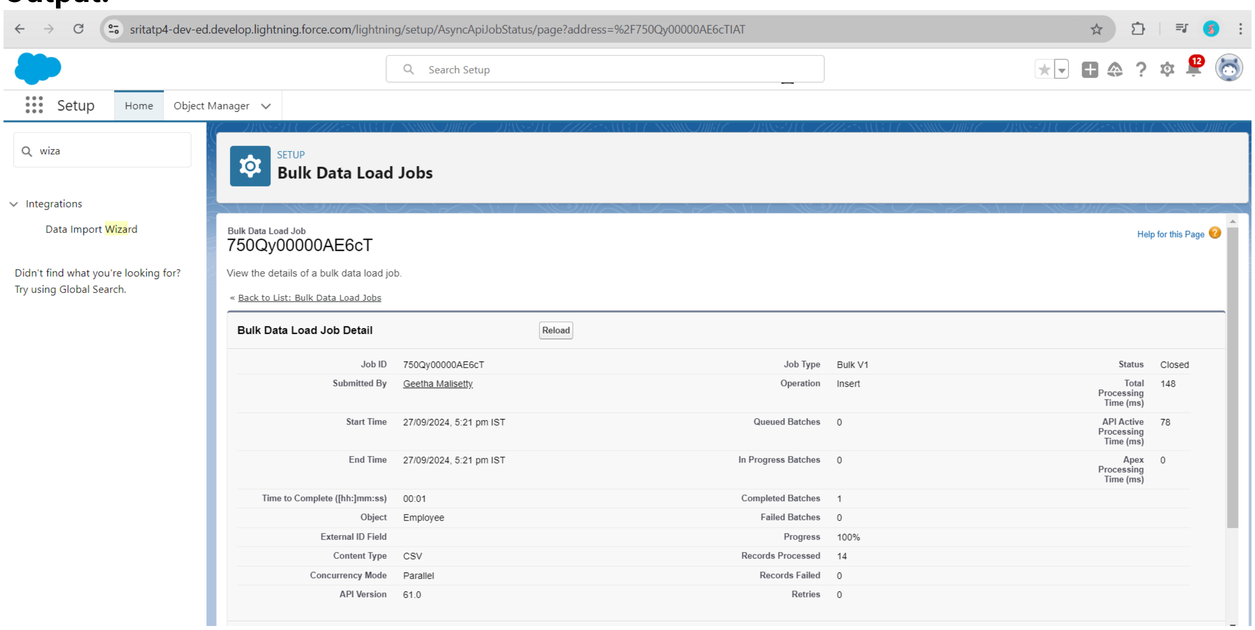
NOTE- Before creating the application download this file from the URL given below and save the file in CSV.

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:



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.Theycan 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.

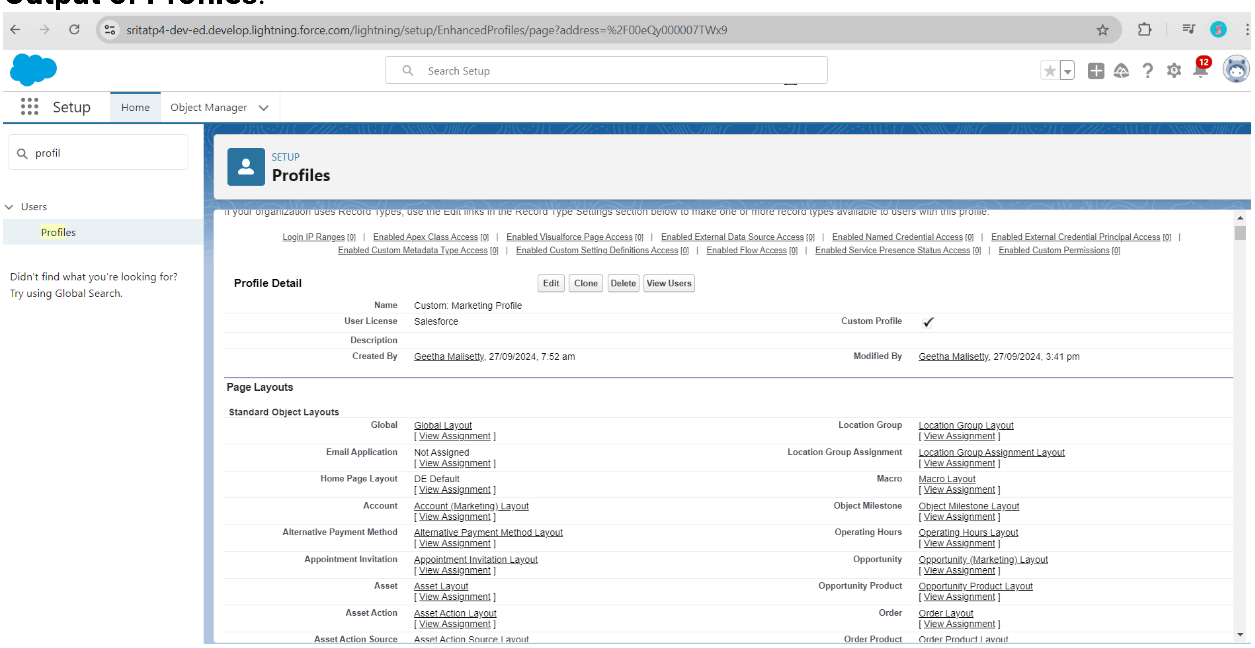
Activity 2: Manager Profile

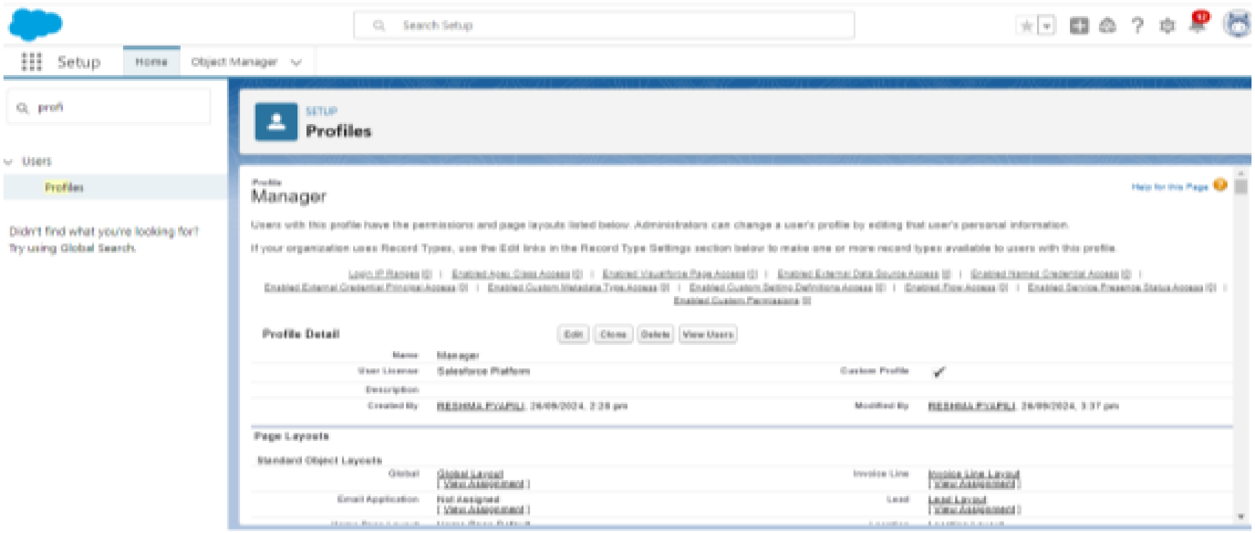
1. Go to setup-→ type profiles in quick find box -→ click on profiles -→ clone the desired profile (Salesforce Platform User) -→ enter profile name (Manager) -→ Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Employee,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

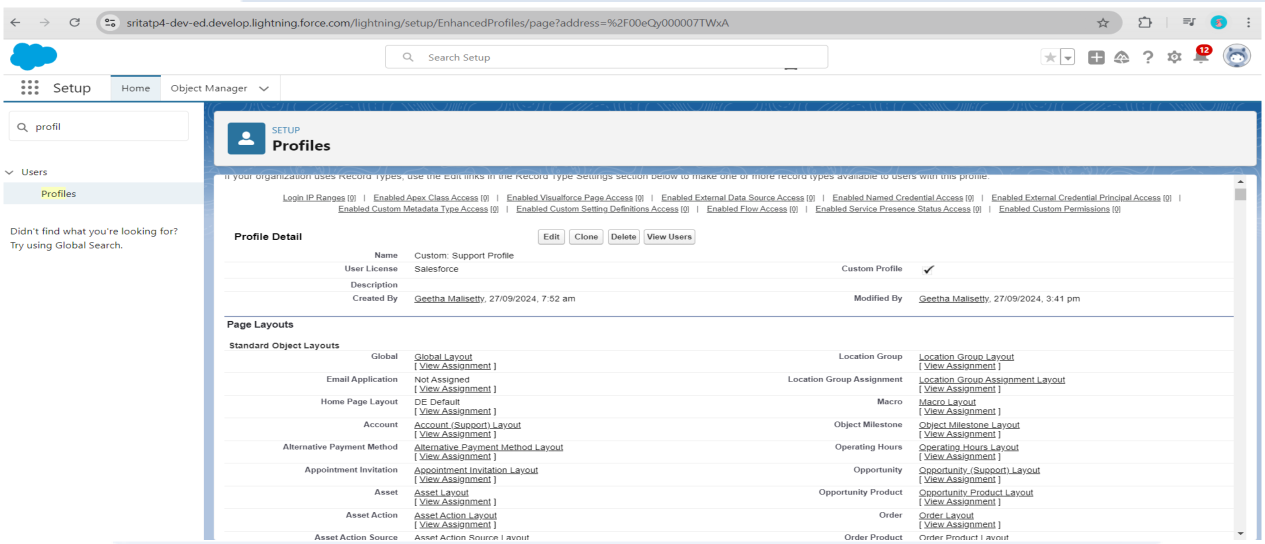
Activity 3: Create Employee Profile

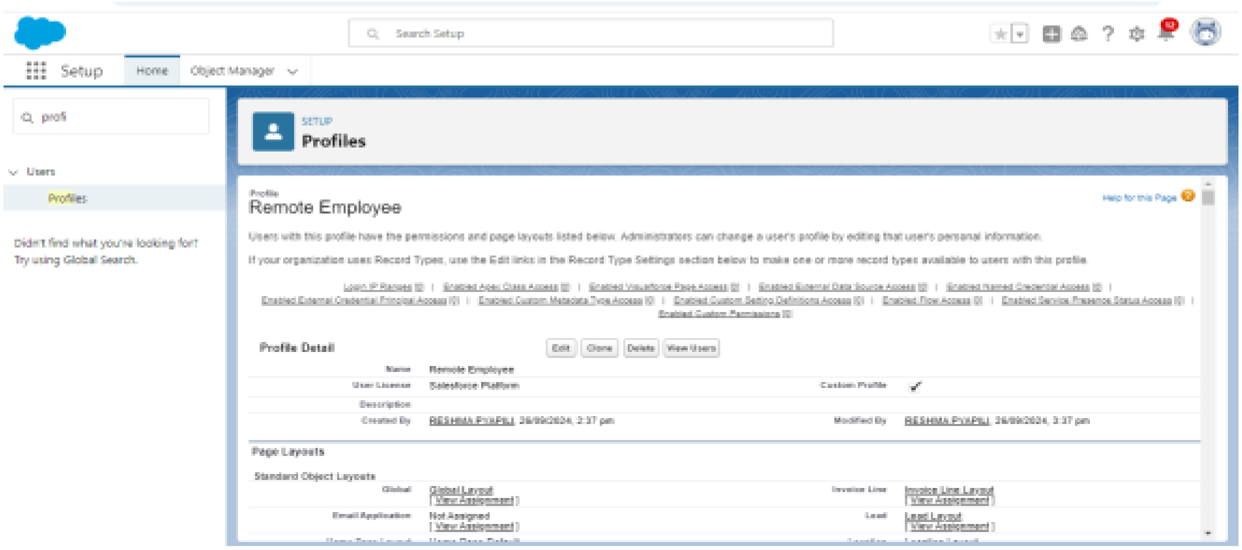
Create Employee Profiles for “On Site Employee”,”Remote Employee” as in Activity 2, but in step 3 only allow permission access for Project and Project 20 Task objects only.

Output of Profiles:







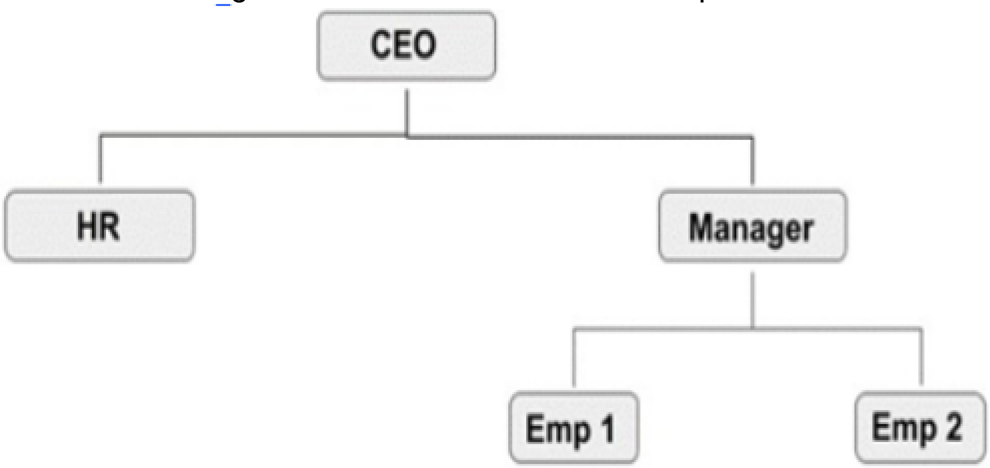


Roles

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

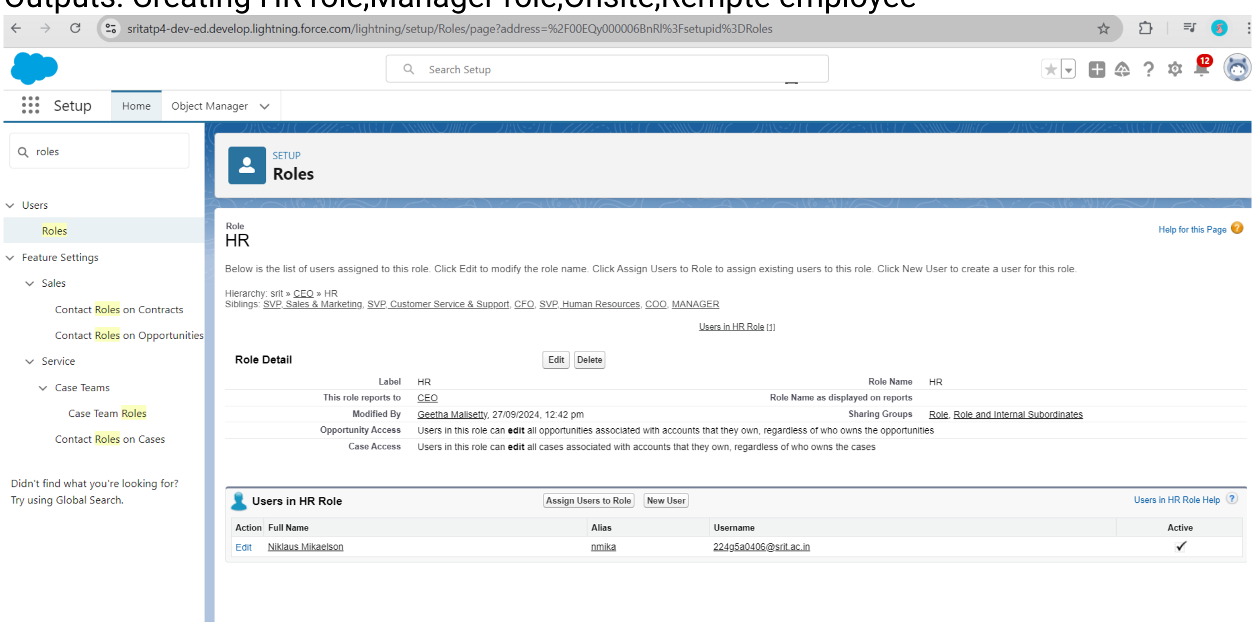
1. Go to quick find -→ Search for Roles -→ click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as “HR” and Role name gets auto populated. Check to whom this role (HR) reports. Then click on Save.
4. Refer the below diagram to understand which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

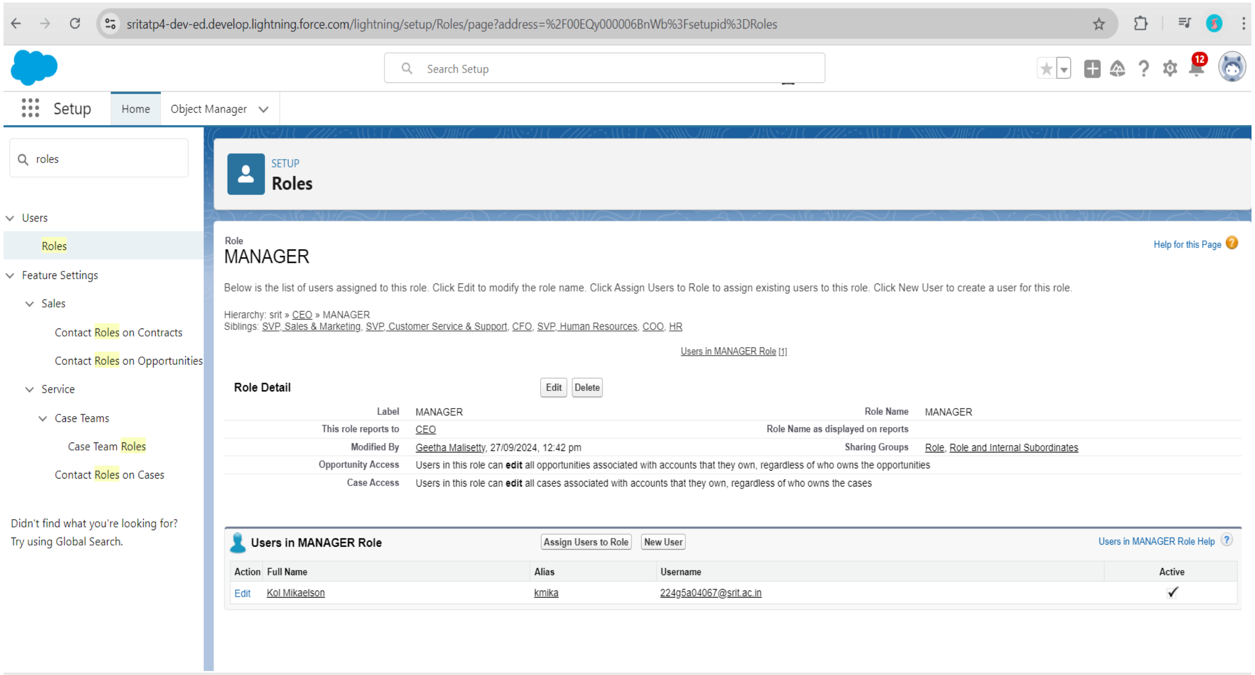


Activity 2:

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

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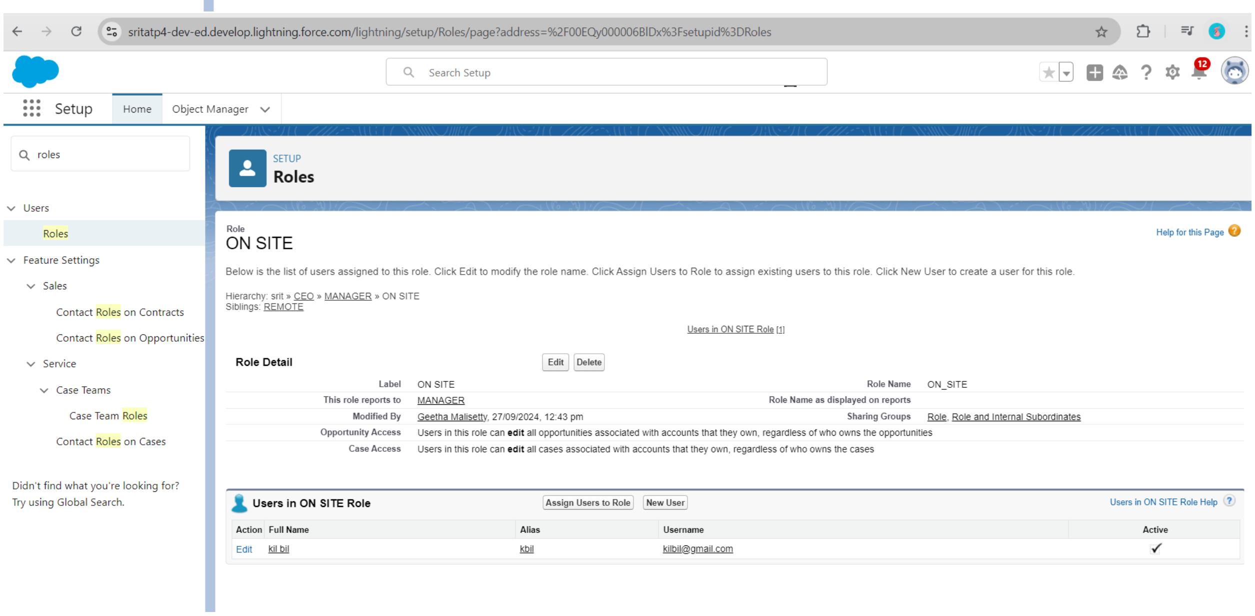
Search Setup
Setup
Home
Object Manager
roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for? Try using Global Search.
SETUP
Roles
Role
MANAGER
Help for this Page
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: srit » CEO » MANAGER
Siblings: SVP, Sales & Marketing, SVP, Customer Service & Support, CFO, SVP, Human Resources, COO, HR
Users in MANAGER Role [1]
Role Detail
Edit
Delete
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
Users in MANAGER Role
Assign Users to Role
New User
Users in MANAGER Role Help
Action Full Name Alias Username Active
Edit Kol Mikaelson kmika 224g5a04067@srit.ac.in ✓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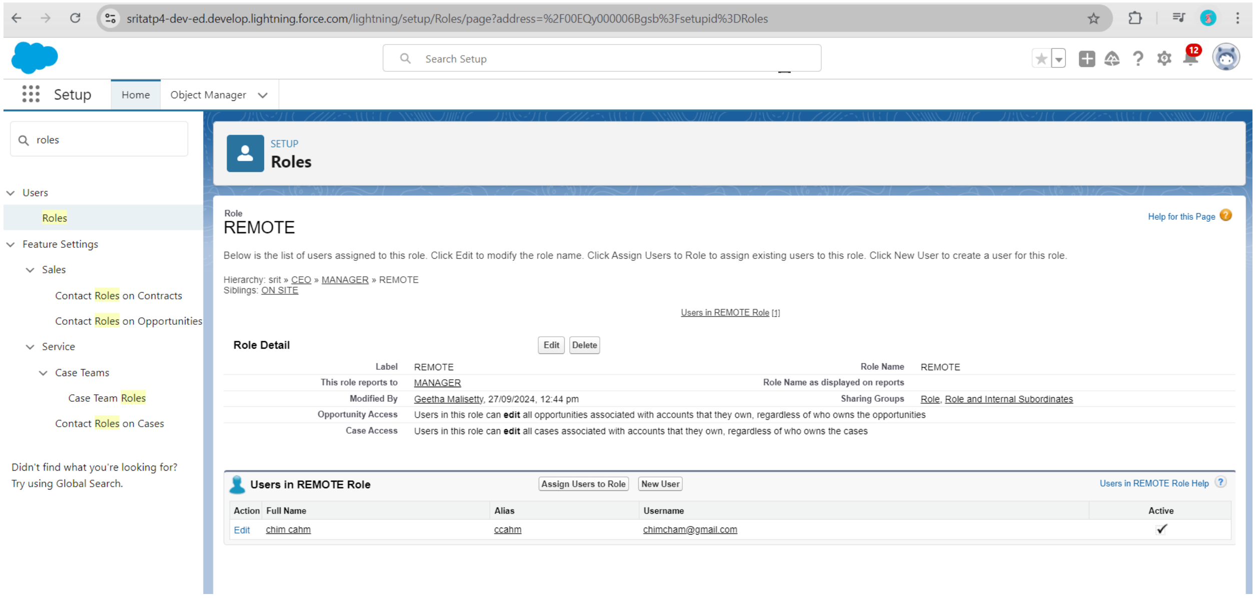
Search Setup
Setup
Home
Object Manager
roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for? Try using Global Search.
SETUP
Roles
Role
ON SITE
Help for this Page
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: srit » CEO » MANAGER » ON SITE
Siblings: REMOTE
Users in ON SITE Role [1]
Role Detail
Edit
Delete
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
Users in ON SITE Role
Assign Users to Role
New User
Users in ON SITE Role Help
Action Full Name Alias Username Active
Edit kil bil kbil kilbil@gmail.com ✓



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.

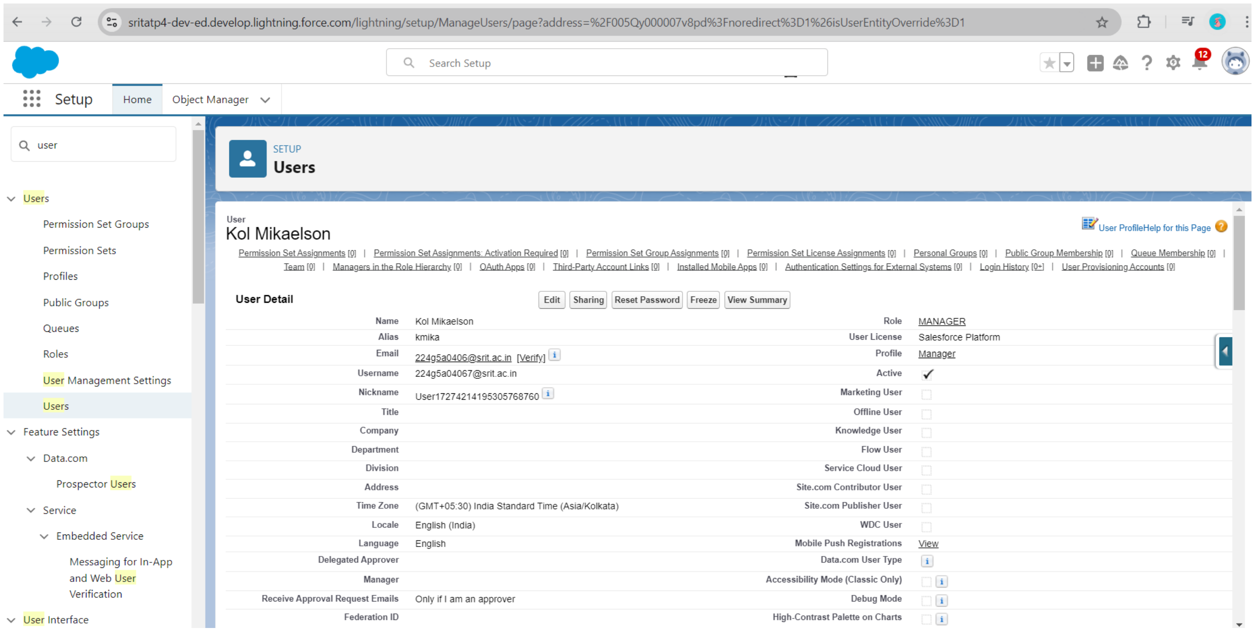
Activity 2: Creating another user

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:



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Search Setup
Setup
Home
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
SETUP
Users
User
Kol Mikaelson
User ProfileHelp for this Page
Permission Set Assignments [0] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [0] | Third-Party Account Links [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [0+] | User Provisioning Accounts [0]
User Detail
Edit
Sharing
Reset Password
Freeze
View Summary
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Role MANAGER
Alias kmika
User License Salesforce Platform
Email 224g5a0406@srit.ac.in [Verify]
Profile Manager
Username 224g5a04067@srit.ac.in
Active
Nickname User17274214195305768760
Marketing User
Title
Offline User
Company
Knowledge User
Department
Flow User
Division
Service Cloud User
Address
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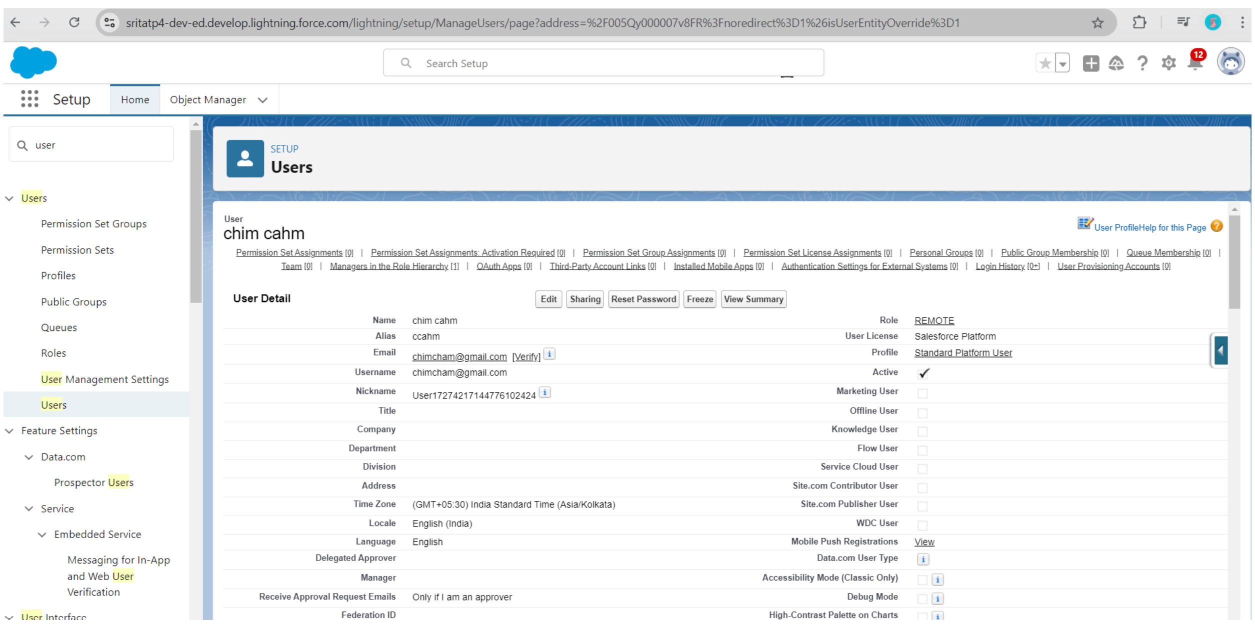
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Site.com Publisher User
Locale English (India)
WDC User
Language English
Mobile Push Registrations View
Delegated Approver
Data.com User Type
Manager
Accessibility Mode (Classic Only)
Receive Approval Request Emails Only if I am an approver
Debug Mode
Federation ID
High-Contrast Palette on Charts



sritatp4-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005Qy000007v8FR%3Fnoredirect%3D1%26isUserEntityOverride%3D1
Search Setup
Setup
Home
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
SETUP
Users
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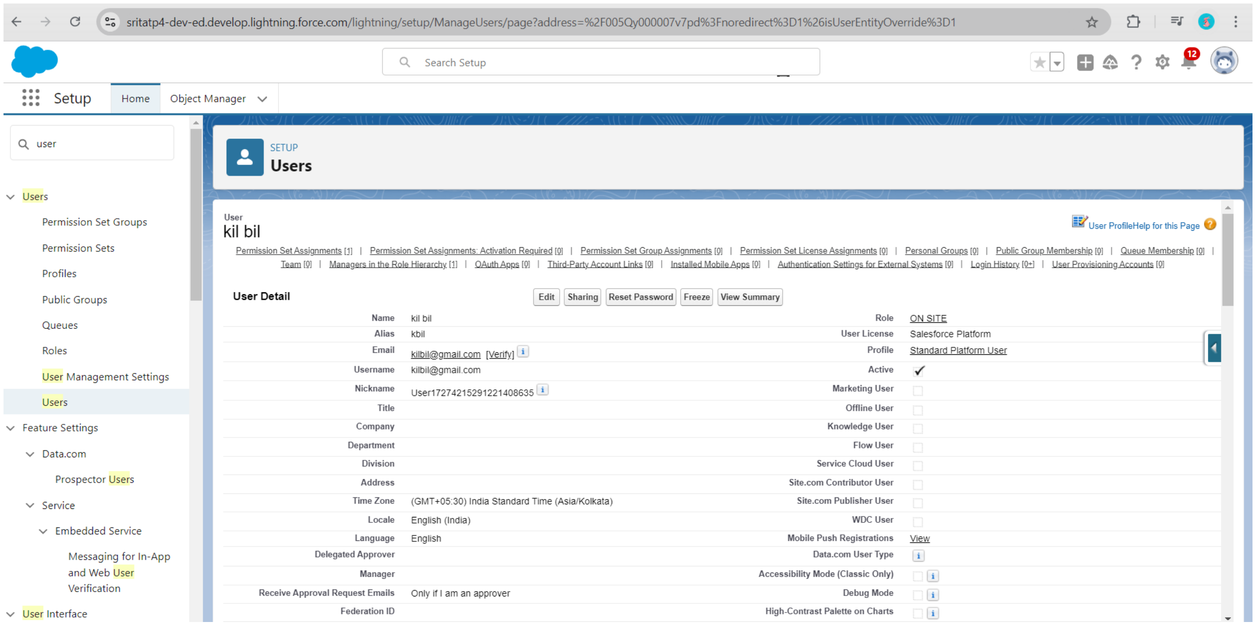
Permission Set Assignments [0] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [1] | OAuth Apps [0] | Third-Party Account Links [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [0+] | User Provisioning Accounts [0]
User Detail
Edit
Sharing
Reset Password
Freeze
View Summary
Name chim cahm
Role REMOTE
Alias ccahm
User License Salesforce Platform
Email chimcham@gmail.com [Verify]
Profile Standard Platform User
Username chimcham@gmail.com
Active
Nickname User17274217144776102424
Marketing User
Title
Offline User
Company
Knowledge User
Department
Flow User
Division
Service Cloud User
Address
Site.com Contributor User
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Site.com Publisher User
Locale English (India)
WDC User
Language English
Mobile Push Registrations View
Delegated Approver
Data.com User Type
Manager
Accessibility Mode (Classic Only)
Receive Approval Request Emails Only if I am an approver
Debug Mode
Federation ID
High-Contrast Palette on Charts



Page layouts

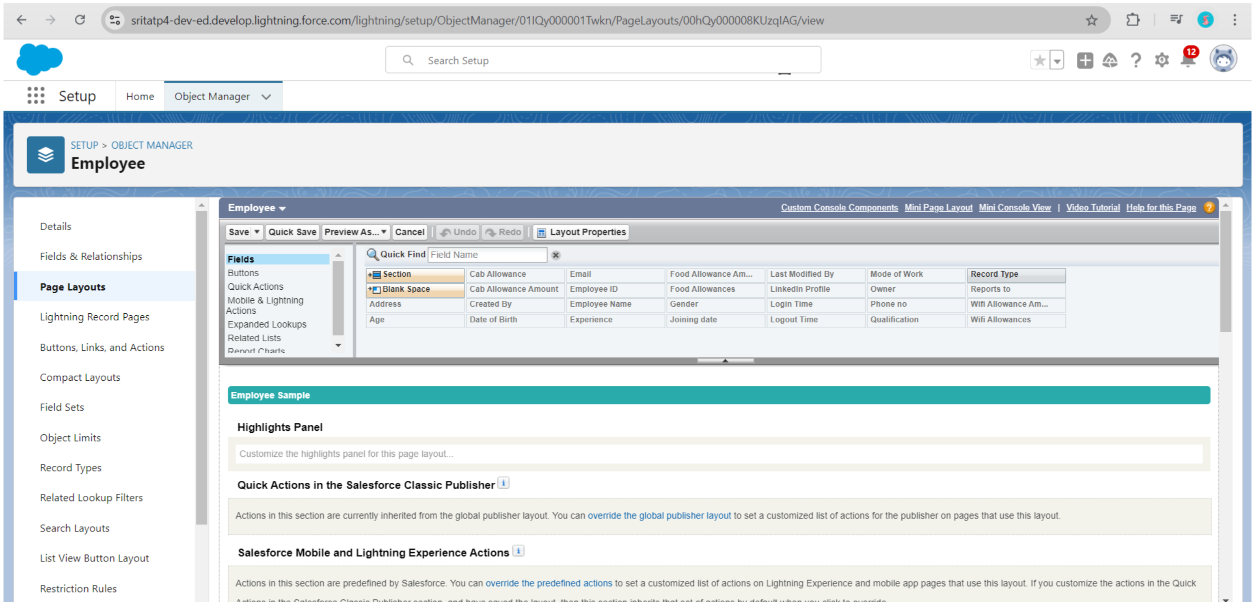
Page Layout in Salesforce allowsus to customize the designand organize detailand edit pagesof records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom linkson standard and custom objects'detail and edit pages.

Activity 1 : creatinga 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 Pagelayout -→ Click on New.
3. Give Page layout Name as "On Site Employee Layout" and clickon Save.
4. Drag and drop the Sectionfrom the highlightpanel below the Information and name it as "Personal Information" and click Ok.
5. Drag Date of Birth, Addressand Age fields from EmployeeInformation to PersonalInformation section.
6. Similarlyperform the above step to create "Allowances" and add allowances fields in it as shown below.
7. Click Save.
8. Make sure your page layoutlooks like the picture above.

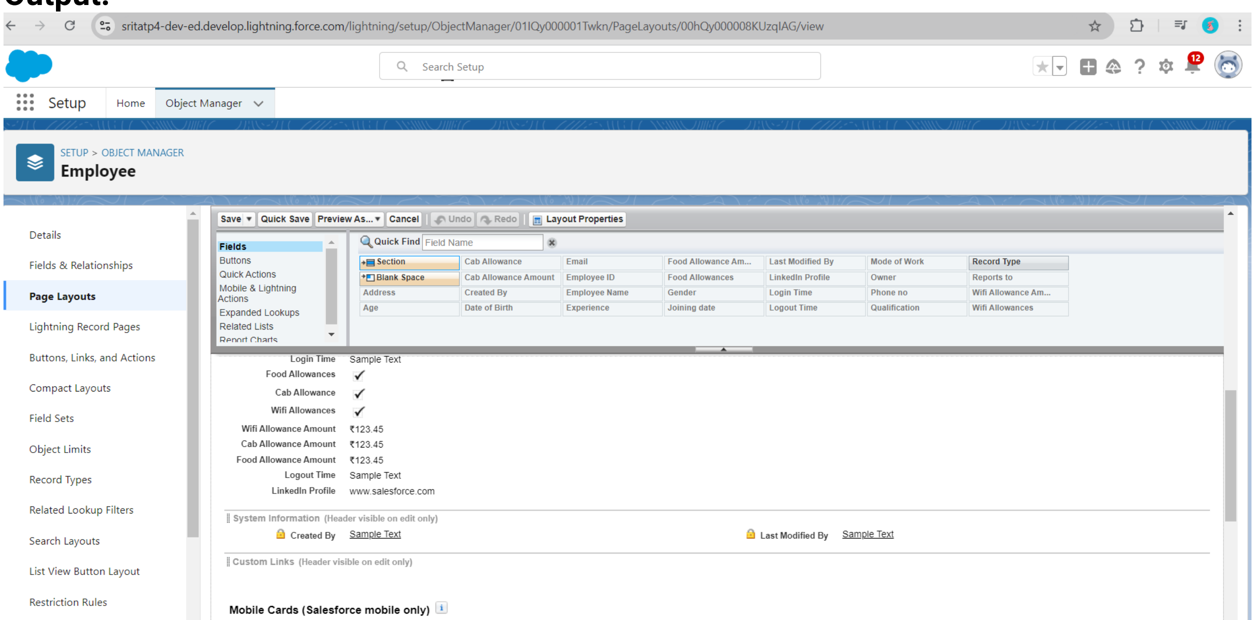
Output:



Activity 2 : Creating another page layout

Create anotherpage layout and name it as "RemoteEmployee Layout", and in the allowances sectionuse 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 enhanceproductivity.

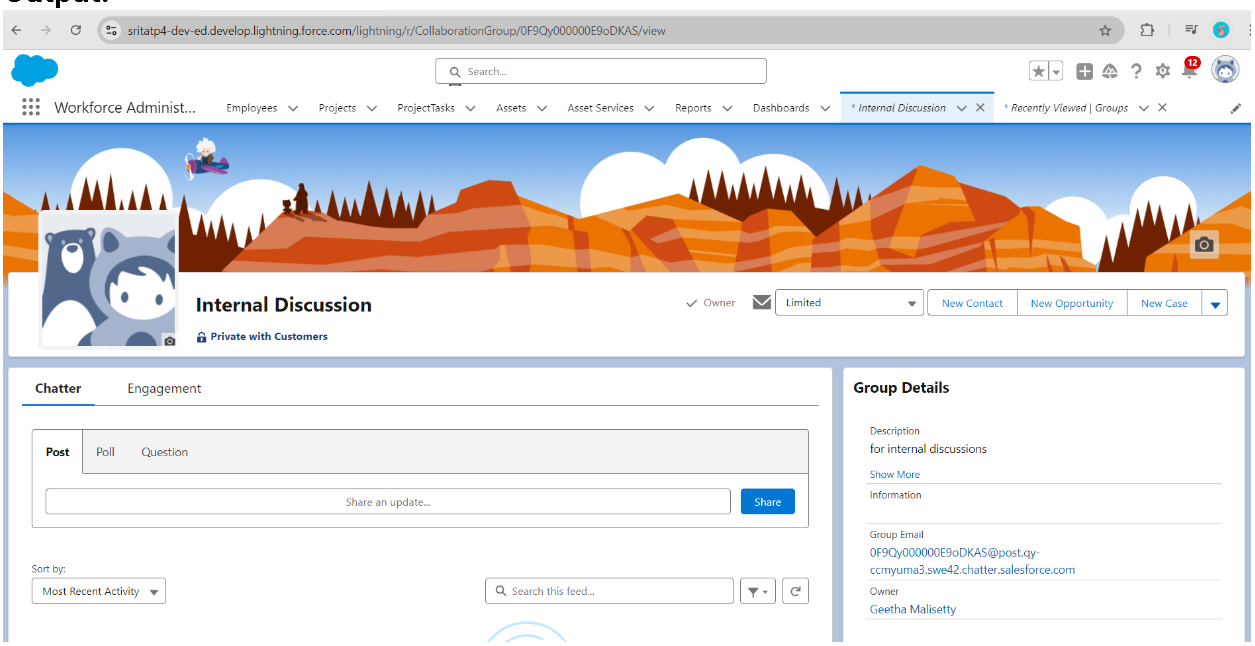
Activity 1 : Creating a chatter group for your organization.

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 Layoutfor manager profileand 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 Employeepage layout for Remote Employee record type.

Permission sets

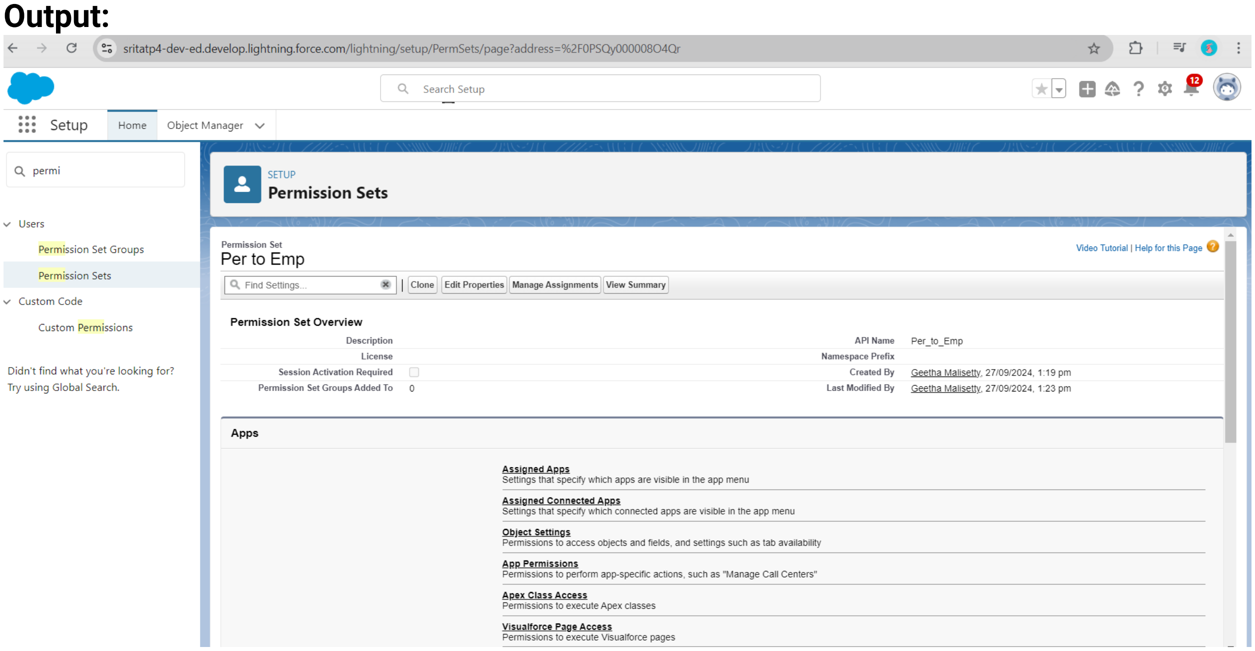
A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profilebut, depending on the Salesforce edition, they can have multiplepermission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

Activity 1: Creatinga permission set

To Create a Permission Set:

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

Output:



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

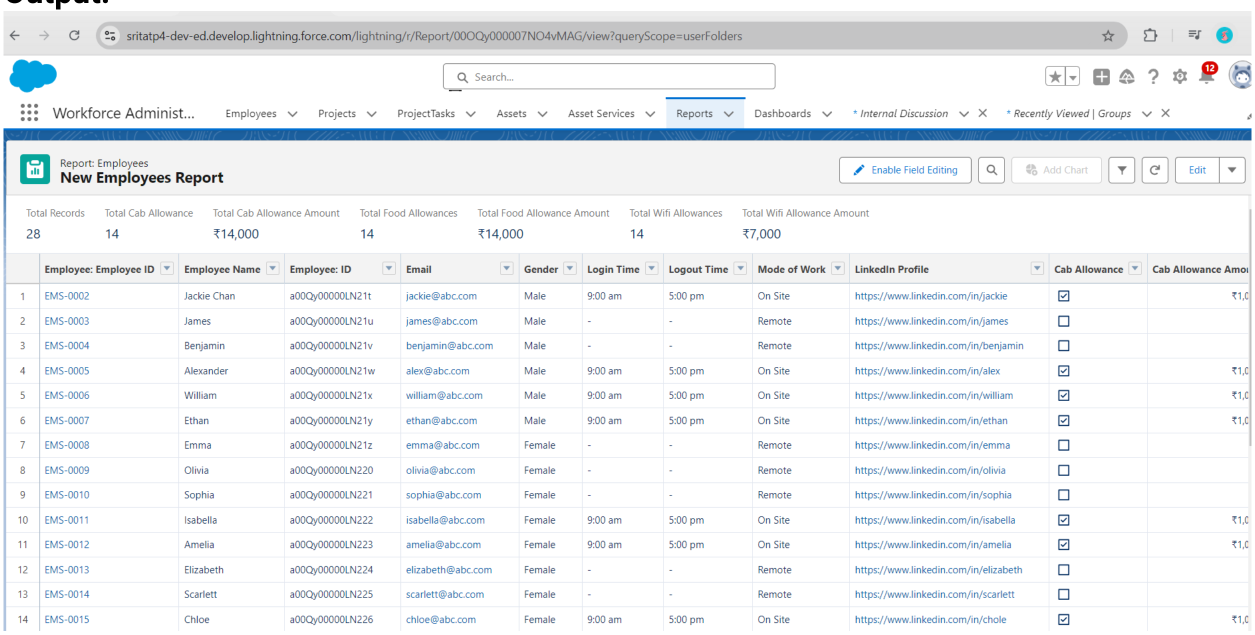
1. Tabular
2. Summary
3. Matrix
4. Joined Reports

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:



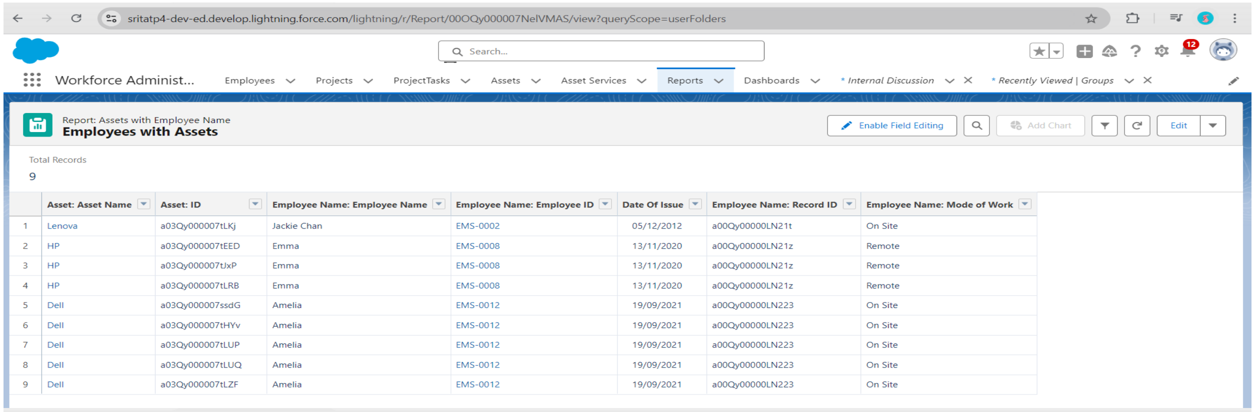
Total Records	Total Cab Allowance	Total Cab Allowance Amount	Total Food Allowances	Total Food Allowance Amount	Total Wifi Allowances	Total Wifi Allowance Amount
28	14	₹14,000	14	₹14,000	14	₹7,000

	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	https://www.linkedin.com/in/jackie	☑	₹1,0
2	EMS-0003	James	a00Qy00000LN21u	james@abc.com	Male	-	-	Remote	https://www.linkedin.com/in/james	☐	
3	EMS-0004	Benjamin	a00Qy00000LN21v	benjamin@abc.com	Male	-	-	Remote	https://www.linkedin.com/in/benjamin	☐	
4	EMS-0005	Alexander	a00Qy00000LN21w	alex@abc.com	Male	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/alex	☑	₹1,0
5	EMS-0006	William	a00Qy00000LN21x	william@abc.com	Male	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/william	☑	₹1,0
6	EMS-0007	Ethan	a00Qy00000LN21y	ethan@abc.com	Male	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/ethan	☑	₹1,0
7	EMS-0008	Emma	a00Qy00000LN21z	emma@abc.com	Female	-	-	Remote	https://www.linkedin.com/in/emma	☐	
8	EMS-0009	Olivia	a00Qy00000LN220	olivia@abc.com	Female	-	-	Remote	https://www.linkedin.com/in/olivia	☐	
9	EMS-0010	Sophia	a00Qy00000LN221	sophia@abc.com	Female	-	-	Remote	https://www.linkedin.com/in/sophia	☐	
10	EMS-0011	Isabella	a00Qy00000LN222	isabella@abc.com	Female	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/isabella	☑	₹1,0
11	EMS-0012	Amelia	a00Qy00000LN223	amelia@abc.com	Female	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/amelia	☑	₹1,0
12	EMS-0013	Elizabeth	a00Qy00000LN224	elizabeth@abc.com	Female	-	-	Remote	https://www.linkedin.com/in/elizabeth	☐	
13	EMS-0014	Scarlett	a00Qy00000LN225	scarlett@abc.com	Female	-	-	Remote	https://www.linkedin.com/in/scarlett	☐	
14	EMS-0015	Chloe	a00Qy00000LN226	chloe@abc.com	Female	9:00 am	5:00 pm	On Site	https://www.linkedin.com/in/chole	☑	₹1,0

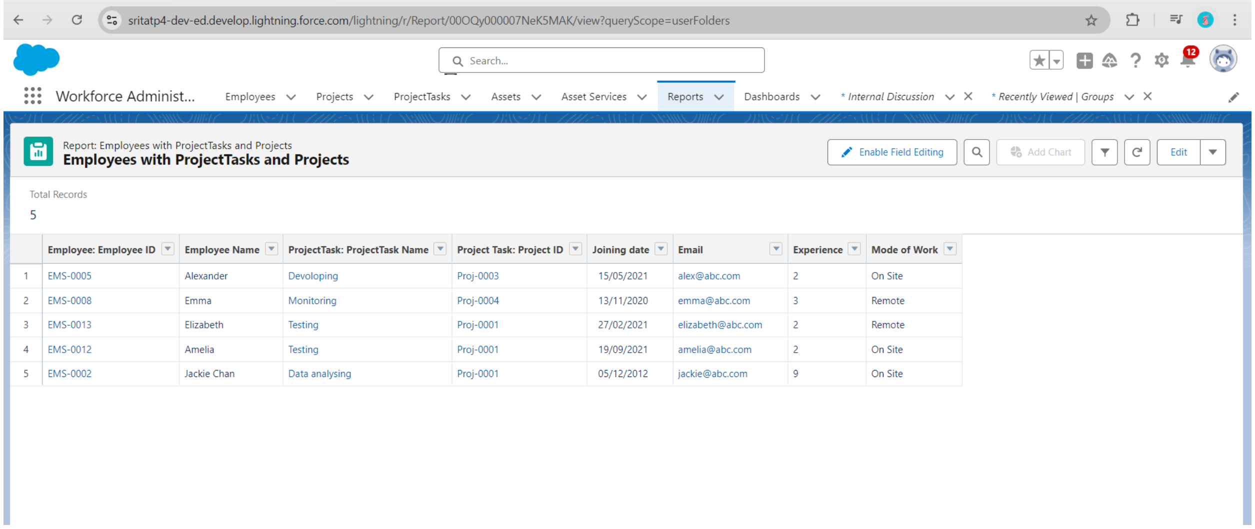
Activity 2: Create 2 more Reports

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:



	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	a03Qy000007tLKj	Jackie Chan	EMS-0002	05/12/2012	a00Qy00000LN21t	On Site
2	HP	a03Qy000007tEED	Emma	EMS-0008	13/11/2020	a00Qy00000LN21z	Remote
3	HP	a03Qy000007tJxP	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	a03Qy000007tHYv	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



	Employee: Employee ID	Employee Name	ProjectTask: ProjectTask Name	Project Task: Project ID	Joining date	Email	Experience	Mode of Work
1	EMS-0005	Alexander	Devoloping	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

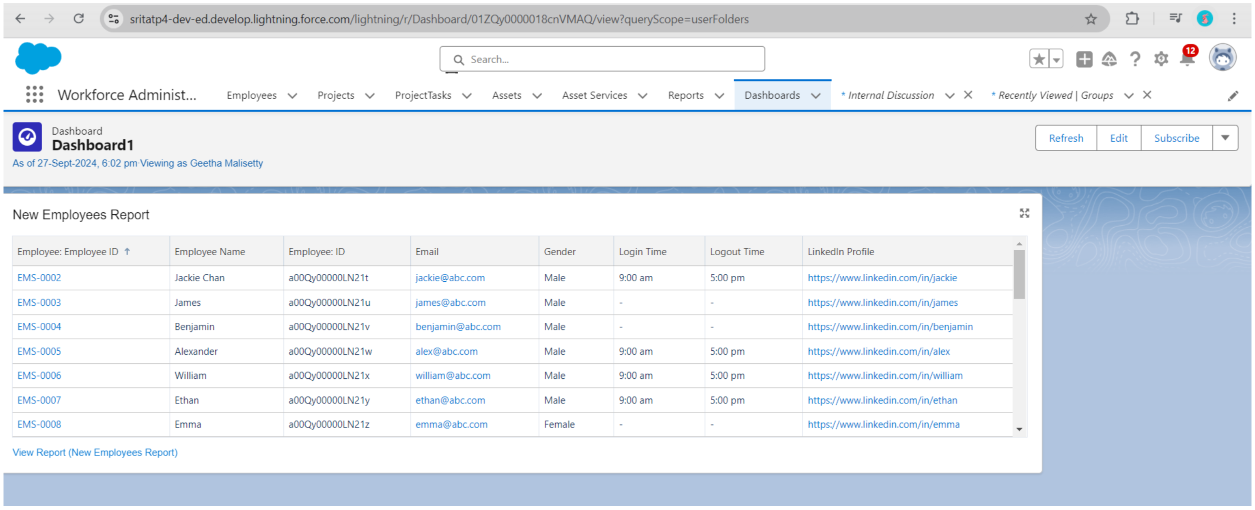
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building,reading, and sharing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

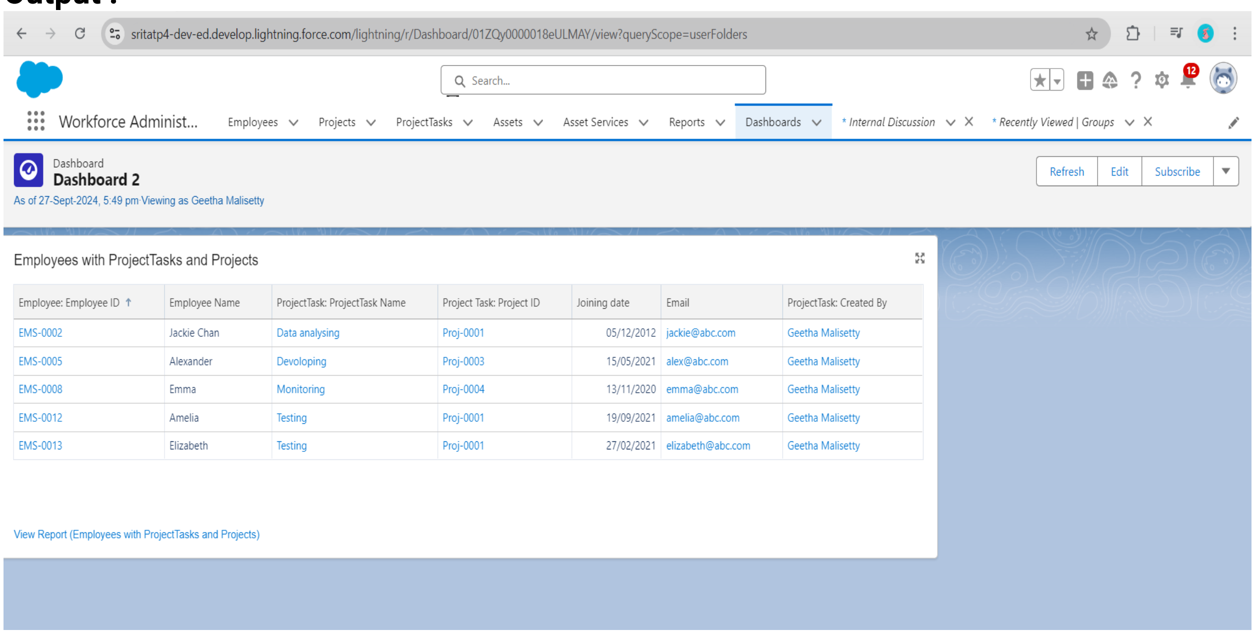
Output:



Activity 2:

Create another Dashboard as we discussed in activity 1.

Output :



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.