

WORKFORCE ADMINISTRATION SOLUTION



Workforce Empowerment Hub

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Abstract

A **Workforce Administration Solution** is a comprehensive system designed to streamline human resource management within an organization. It includes functionalities such as employee onboarding, time tracking, payroll processing, and benefits administration, all integrated into a single platform. This consolidation reduces administrative burdens, enhances data accuracy, and promotes a more organized work environment.

The benefits of such a solution are significant. First, it increases efficiency by automating routine tasks like timekeeping and payroll calculations, minimizing errors and allowing HR personnel to focus on strategic initiatives. Centralized data management ensures that employee information is easily accessible and up-to-date, boosting overall productivity. Second, it improves compliance and reporting capabilities, helping organizations stay aligned with labor laws and regulations while providing tools to maintain accurate records. Enhanced reporting features allow HR teams to generate valuable insights into workforce trends, facilitating informed decision-making about staffing and employee engagement.

A **Workforce Administration Solution** equips organizations to cultivate a more adaptive, informed, and compliant workforce, driving improved performance and fostering higher levels of employee satisfaction.

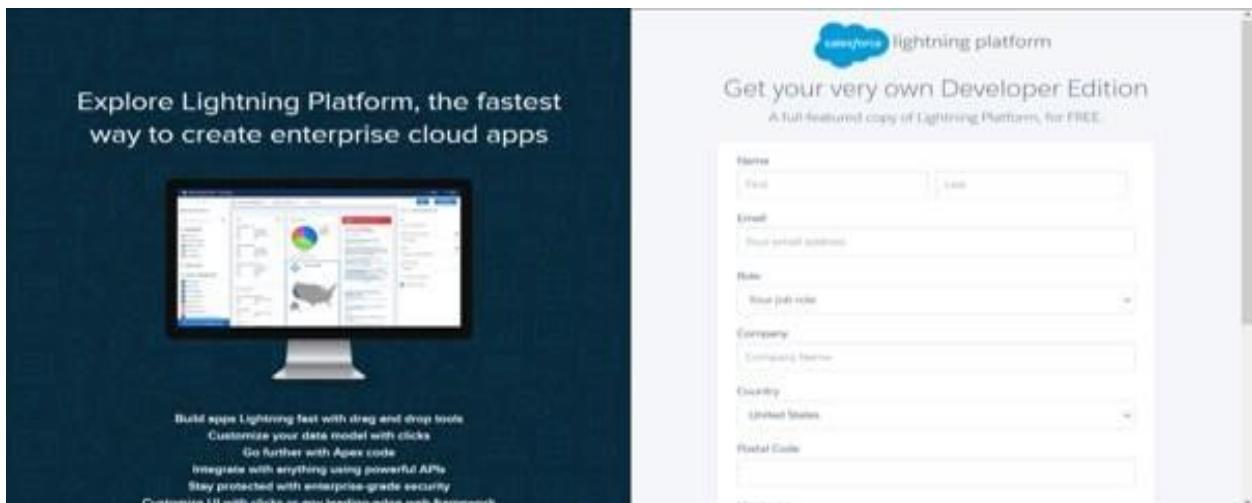
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1. Creating a Developer Accountin Salesforce

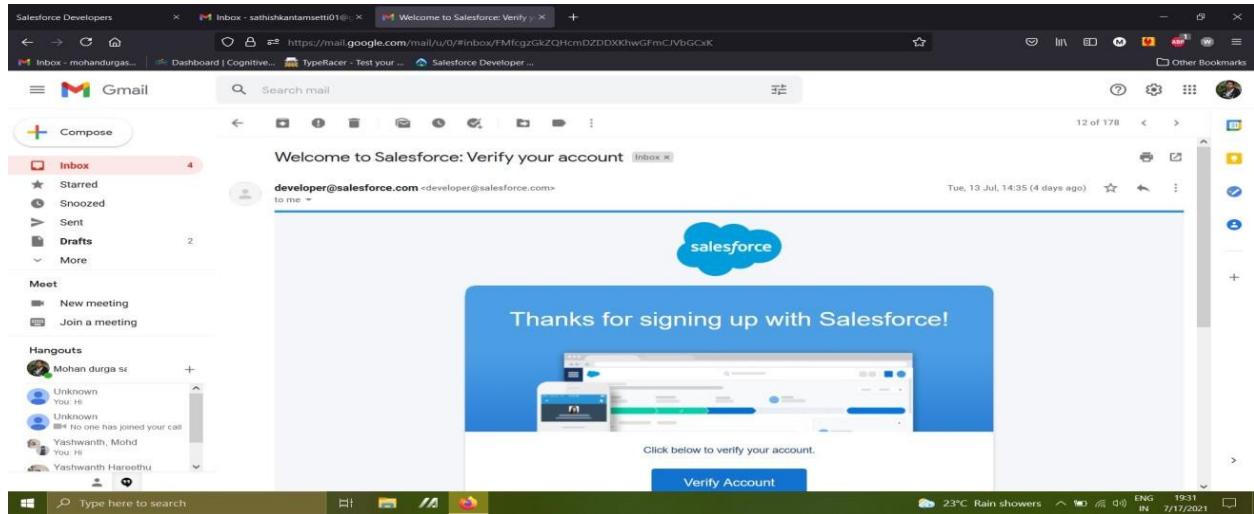
Step 1: Sign Up for a DeveloperOrg

1. Go to <https://developer.salesforce.com/signup> .
2. Click on "Sign Up."
3. Fill out the Sign-Up Form with the following details:
 - a. First Name & Last Name
 - b. Email
 - c. Role: Developer
 - d. Company: [Your College Name]
 - e. Country: India
 - f. Postal Code:[Your Pin Code]
 - g. Username: Create a usernameusing a combination of your name and company.This does not need to be a valid email; you can format it as username@organization.com.
4. Click on "Sign Up" after filling in all the details.



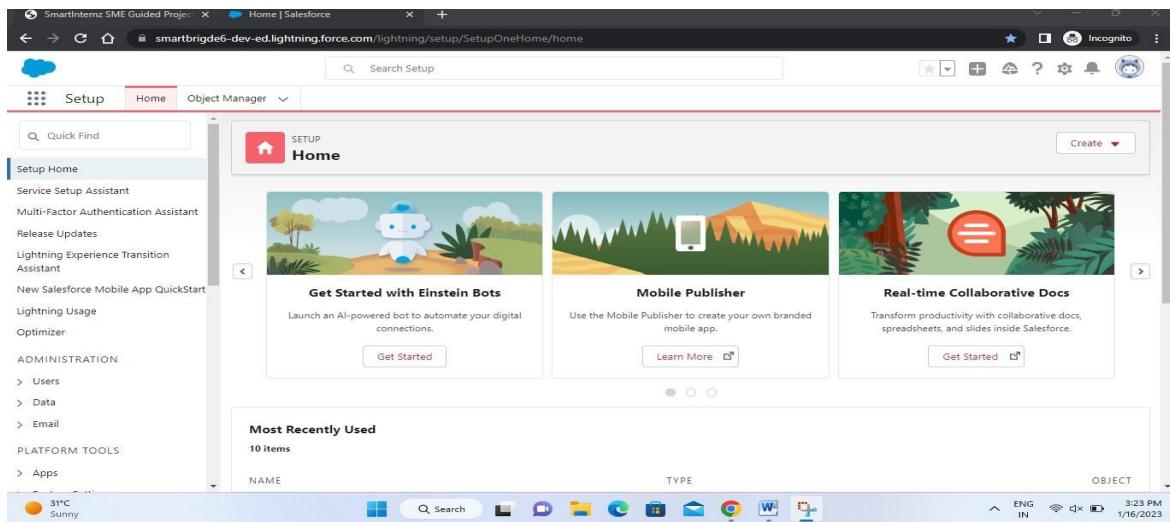
Step 2: Account Activation

1. **Go to your email inbox** that you used for signingup.
2. **Find the verification email** from Salesforce and click on the "Verify Account" link to activate your account.
 - a. *Note:* The email might take 5-10 minutes to arrive.



Step 3: Login to Your Salesforce Account

1. **Go to** login.salesforce.com.
2. **Enter your username and password** created during the sign-up process.
3. **Login** to access your Salesforce Developer account.
 - a. You will see the home page after logging in.



2. Salesforce Objects

Salesforce objects are database tablesthat allow you to store data specific to an organization. Objects in Salesforce are of two types:

1. **Standard Objects:** These are the pre-built objects provided by Salesforce, such as Users, Contracts, Reports, Dashboards, and more. Standard objects form the foundation of Salesforce's data structure and cover common business scenarios.
2. **Custom Objects:** These are user-defined objects created to store data that is unique to your organization's needs. In the context of the Workforce Administration Solutions, examples of custom objects include **Employee, Project, Project Task, Asset, Asset Service**.

2.1 Creating Employee custom object

In the Workforce Administration Solutions, we need to create custom objects: **Employee, Project, Asset, and Others**. The following steps will guide you through the process of creating these objects in Salesforce.

Step 1: Access Setup

- i. Click on the gear icon in the upper-right corner of Salesforce.
- ii. Select "Setup" from the dropdown menu.

Step 2: Open ObjectManager

1. Click on the "Object Manager" tab located next to the Home tab.

Step 3: Create a Custom Object

1. On the **ObjectManager** page, look to the right side of the screen.
2. Click on the "Create" dropdown and select **Custom Object**.

Step 4: Create "Employee" Object

1. On the **Custom Object Definition** page, enter the following details:
 - a. **Label:** Employee
 - b. **Plural Label:** Employees

- c. **Record Name:** Employee
- 1. **Check the following boxes:**
 - a. Allow Reports
 - b. Allow Search
- 2. **Click "Save"** to create the object.

Step 5: Create a Custom Tab for "Employee"

- 1. **Click the "Home" tab** and enter "Tabs" in the Quick Find search bar.
- 2. **Select "Tabs"** from the search results.
- 3. Under **Custom Object Tabs**, click **New**.
- 4. For **Object**, select **Employee**.
- 5. For **Tab Style**, select any icon that represents your object.
- 6. Leave all other settings as defaults and click **Next**.
- 7. **Click "Next"** again, then **Save**.

2.2 Creating the Project Object

The following steps will guide you through the process of creating the **Project** object in Salesforce.

Step 1: Access Setup

- i. **Click on the gear icon** in the upper-right corner of Salesforce.
- ii. **Select "Setup"** from the dropdown menu.

Step 2: Open Object Manager

- 1. **Click on the "Object Manager"** tab located next to the Home tab.

Step 3: Create a Custom Object

- 1. On the **Object Manager** page, look to the right side of the screen.
- 2. **Click on the "Create"** dropdown and select **Custom Object**.

Step 4: Create "Project" Object

- 1. On the **Custom Object Definition** page, enter the following details:

- a. **Label:** Project
 - b. **Plural Label:** Projects
 - c. **Record Name:** Projects
2. **Check the following boxes:**
 - a. **Allow Reports**
 - b. **Allow Search**
 3. **Click "Save"** to create the object.

Step 5: Create a Custom Tab for "Project"

1. **Click the "Home" tab** and enter "Tabs" in the Quick Find search bar.
2. **Select "Tabs"** from the search results.
3. Under **Custom ObjectTabs**, click **New**.
4. For **Object**, select **Projects**.
5. For **Tab Style**, select any icon that represents your object.
6. Leave all other settings as defaults and click **Next**.
7. **Click "Next"** again, then **Save**.

2.3 Creating the Project Task Object

The following steps will guide you through the process of creating the **ProjectTask** object in Salesforce.

Step 1: Access Setup

- i. **Click on the gear icon** in the upper-right corner of Salesforce.
- ii. **Select "Setup"** from the dropdown menu.

Step 2: Open ObjectManager

1. **Click on the "Object Manager"** tab located next to the Home tab.

Step 3: Create a Custom Object

1. On the **ObjectManager** page, look to the right side of the screen.

2. Click on the "Create" dropdown and select **Custom Object**.

Step 4: Create "Project Task" Object

1. On the **Custom Object Definition** page, enter the following details:
 - Label:** ProjectTask
 - Plural Label:** Project Tasks
 - Record Name:** Project Task
2. Check the following boxes:
 - Allow Reports**
 - Allow Search**
3. Click "Save" to create the object.

Step 5: Create a Custom Tab for "Project Task"

1. Click the "Home" tab and enter "Tabs" in the Quick Find search bar.
2. Select "Tabs" from the search results.
3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Asset**.
5. For **Tab Style**, select any icon that represents your object.

2.4 Creating the Asset Object

The following steps will guide you through the process of creating the **ProjectTask** object in Salesforce.

Step 1: Access Setup

- i. Click on the gear icon in the upper-right corner of Salesforce.
- ii. Select "Setup" from the dropdown menu.

Step 2: Open Object Manager

1. Click on the "Object Manager" tab located next to the Home tab.

Step 3: Create a Custom Object

2. On the **ObjectManager** page, look to the right side of the screen.
3. **Click on the "Create" dropdown and select Custom Object.**

Step 4: Create "Project Task" Object

1. On the **Custom Object Definition** page, enter the following details:
 - a. **Label:** Asset
 - b. **Plural Label:** Assets
 - c. **Record Name:** Asset
2. **Check the following boxes:**
 - a. **Allow Reports**
 - b. **Allow Search**
3. **Click "Save"** to create the object.

Step 5: Create a Custom Tab for "Asset"

1. **Click the "Home" tab** and enter "Tabs" in the Quick Find search bar.
2. **Select "Tabs"** from the search results.
3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Asset**.
5. For **Tab Style**, select any icon that represents your object.

2.5 Creating the "Asset Service" Object

The following steps will guide you through the process of creating the Asset object in Salesforce.

Step 1: Access Setup

- i. **Click on the gear icon** in the upper-right corner of Salesforce.
- ii. **Select "Setup"** from the dropdown menu.

Step 2: Open ObjectManager

- iii. **Click on the "Object Manager" tab** located next to the Home tab.

Step 3: Create a Custom Object

1. On the **ObjectManager** page, look to the right side of the screen.
2. **Click on the "Create" dropdown and select Custom Object.**

Step 4: Create "Asset" Object

3. On the **Custom Object Definition** page, enter the following details:
 - a. **Label:** Asset Service
 - b. **Plural Label:** Asset Services
 - c. **Record Name:** Asset Service
4. **Check the following boxes:**
 - a. **Allow Reports**
 - b. **Allow Search**
5. **Click "Save"** to create the object.

Step 5: Create a Custom Tab for "Asset Service"

1. **Click the "Home" tab** and enter "Tabs" in the Quick Find search bar.
2. **Select "Tabs"** from the search results.
3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Asset Service**.
5. For **Tab Style**, select any icon that represents your object.

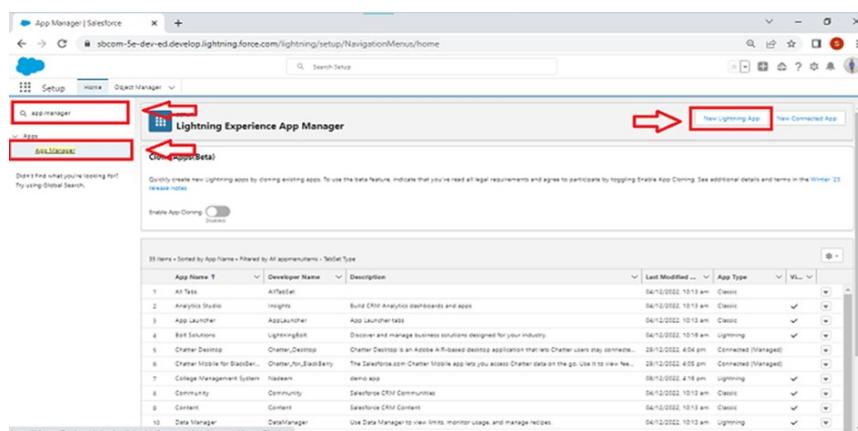
3.The Lightning App

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

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Create a LightningApp

To create a lightningapp page:



1.

Go to setuppage --> search“app manager” in quick find --> select “app manager” --> click on New lightning App.

2. Fill the app name in app details and

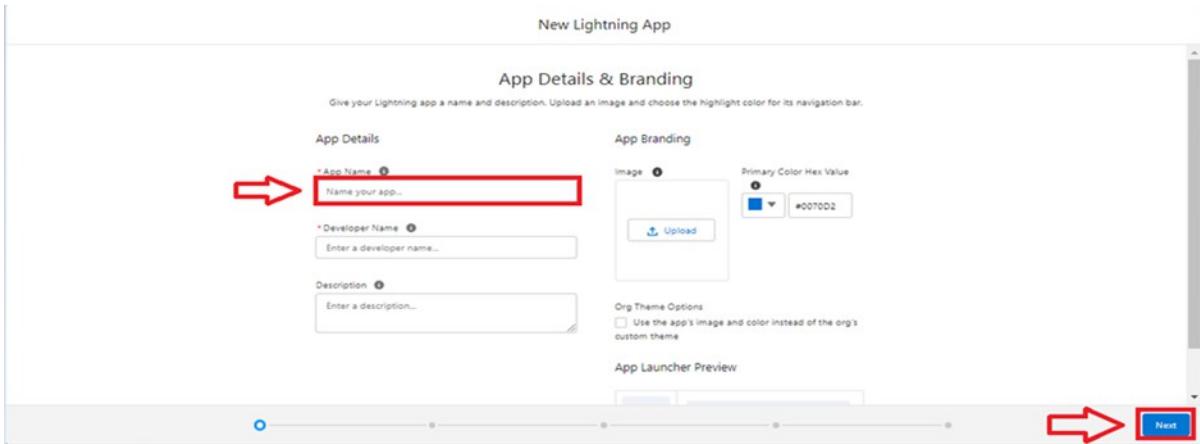
brandingas follow App Name :

Workforce Administrator Solution

Developer Name : this will auto
populated

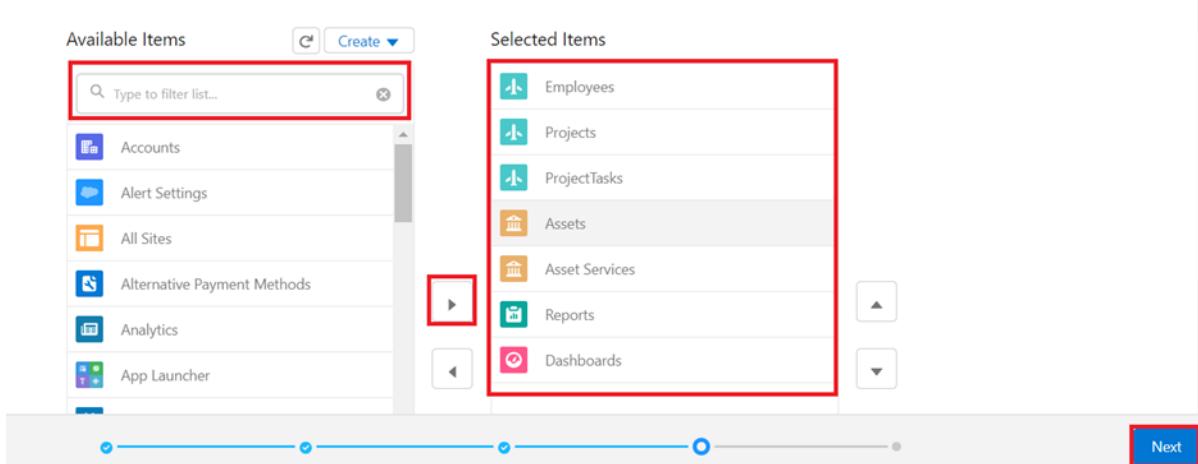
Description : Give a meaningful description

Image : optional (if you want to give any imageyou can otherwise not
mandatory) Primary color hex value : keep this default



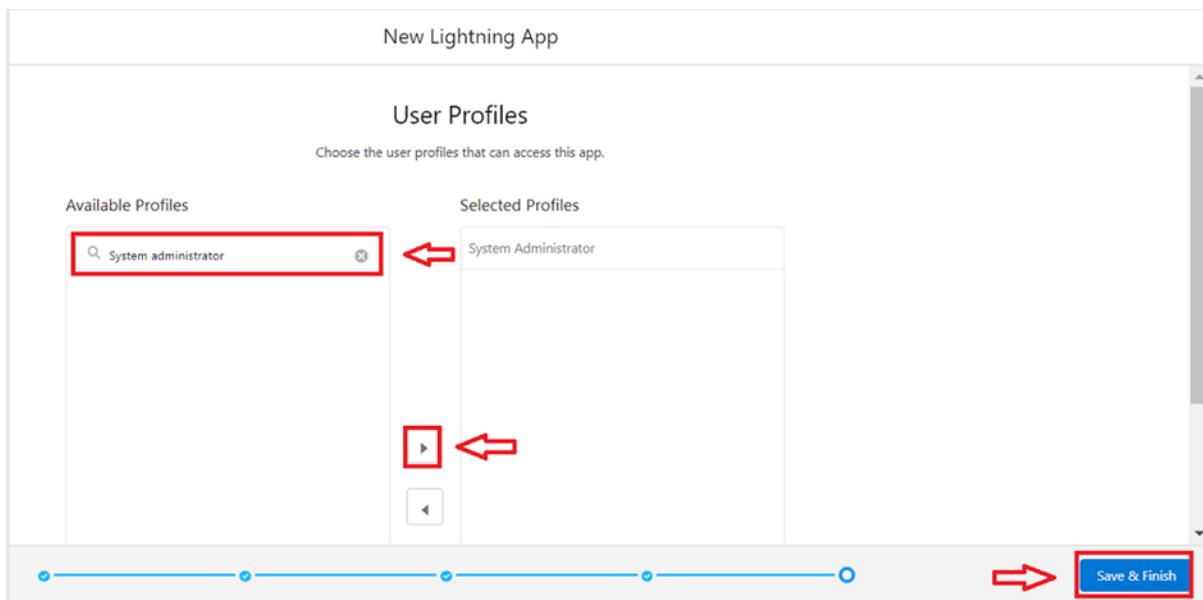
3. Then click Next --> (App option page) keep it as default--> Next --> (Utility Items)keep it as default --> Next.

4. To Add Navigation Items:



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

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



1. To Add User Profiles:

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

4. Fields & Relationships

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

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

1. Created By
2. Owner
3. Last Modified
4. Field Made During object Creation.

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

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.

The screenshot shows the Salesforce Object Manager page. At the top, there is a navigation bar with 'Setup' and 'Object Manager'. A red box highlights the 'Object Manager' tab, and a red arrow points to it. Below the navigation bar, there is a search bar containing the text 'Employee', which is also highlighted with a red box and has a red arrow pointing to it. The main area is titled 'Object Manager' and shows a table with one item: 'Employee'. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'LABEL' column shows 'Employee', the 'API NAME' column shows 'Employee_c', and the 'TYPE' column shows 'Custom Object'. The 'LAST MODIFIED' column shows '20/06/2023'. The 'DEPLOYED' column has a dropdown menu with a single item '✓'.

2. Now click on “Fields & Relationships” --> New

The screenshot shows the Salesforce Object Manager interface for the 'Employee' object. The 'Fields & Relationships' tab is selected. In the top right, there is a 'New' button highlighted with a red box and an arrow pointing to it.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Employee ID	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

3. Select Data type as “Text”.

This screenshot shows the data type selection screen. The 'Text' option is selected and highlighted with a red box and an arrow pointing to it. Other options shown include Picklist, Picklist (Multi-Select), Text Area, and Text Area (Long).

4. Click on Next

This screenshot shows Step 2 of 4 for creating a new custom field. The 'Field Label' is set to 'Employee Name'. The 'Length' is set to 18. The 'Field Name' is auto-generated as 'Employee_Name'. A red arrow points to the 'Next' button in the top right corner.

5. Fill the above as following:

- 1 Field Label: Employee Name
- 2 Length : 18
- 3 Field Name : gets auto generated
- 4 Click on Next --> Next --> Save and new.

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.

<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
<input type="radio"/> Date	Allows users to enter a date or pick a date from a popup calendar.
<input type="radio"/> Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
<input type="radio"/> Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass

3. Click on Next.

4. Fill the above as following:

- Field Label: Date of Birth.
- Field Name : gets auto generated.
- Click on Next --> Next --> Save and new.

Creating Formula Field in Employee Object

- Repeat step 1 and 2 mentioned in activity 1
- Select Data type as “Formula” and click Next.
- Give Field Label and Field Name as “Age” and select formula return type as “Number” and click next.

Step 2. Choose output type Step 2 of 5

Previous **Next**

Field Label **Age**

Field Name **Age**

Auto add to custom report type Add this field to existing custom report types that contain this entity

Formula Return Type

- None Selected Select one of the data types below.
- Checkbox Calculate a boolean value
Example: `[TODAY() > CloseDate]`
- Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `[Gross Margin = Amount - Cost__c]`
- Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `[Reminder Date = CloseDate - 7]`
- Date/Time Calculate a datetime, for example, by adding a number of hours or days to another date/time.
Example: `[Next = NOW() + 1]`
- Number Calculate a numeric value.
Example: `[Fahrenheit = 1.8 * Celsius__c + 32]`

- Under Advanced Formula write down the formula and click “Check Syntax” and Next --> Next --> Save & New.

Step 3. Enter formula

Step 3 of 5

Previous Next Cancel

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Fahrenheit = 1.8 * Celsius + 32 | More Examples

Simple Formula Advanced Formula

Insert Field Insert Operator

Age (Number)
YEAR(TODAY()) - YEAR(Date_of_Birth__c)

Check Syntax No syntax errors in merge fields or functions. (Compiled size: 71 characters)

Description

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

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.

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label Gender

Values

Use global picklist value set
 Enter values, with each value separated by a new line

Male
Female

Display values alphabetically, not in the order entered
 Use first value as default value
 Restrict picklist to the values defined in the value set

Field Name Gender

Description

Help Text

4. Click Next --> Next --> Next --> Save & New.

Creating Self-Relationship Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as "Lookup Relationship" and click Next.
3. Select Employee from the drop down related to the field and click Next.



Step 2. Choose the related object

Select the other object to which this object is related.

Related To

Step 2

Previous Next Cancel

Previous Next Cancel

4. Give Field Label as “Reports to” and click Next.

5. Next --> Next --> Save & New.

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 --> click on the object.

2. Click on fields & relationship --> click on New.

3. Select “Master-Detail relationship” as data type and click Next.

4. For field label related to: select “Employee” object and click Next.

5. Give Field Label as “Employee Name” and click Next.

6. Next --> Next --> Save & New.

Creating Remaining Fields in Employee Object

Repeat the above steps to create many fields.

5. 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).

Primarily, there are four levels of access that can be set in Salesforce OWD and they are-

1. Public Read/Write/Transfer
2. Public Read/Write
3. Public Read/Only
4. Private

Data is the most precious thing of any organization and keeping it safe is the first most priority of any Admin in the organization. As an Admin, to ensure data privacy and compliance with regulations, you need to restrict access to sensitive customer information using OWD.

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.

The screenshot shows the Salesforce Sharing Settings page. At the top, there's a search bar with 'sharing settings' and a 'Sharing Settings' link under the 'Security' category. Below the search bar, a message says 'Didn't find what you're looking for? Try using Global Search.' On the right, the 'Sharing Settings' page is displayed with the title 'Sharing Settings'. It includes a note about displaying organization-wide sharing settings and a dropdown for 'Manage sharing settings for: All Objects'. There's also a 'Disable External Sharing Model' button. The main section is titled 'Default Sharing Settings' and contains a table for 'Organization-Wide Defaults'. The table has columns for 'Object', 'Default Internal Access', and 'Default External Access'. The rows show settings for Lead, Account and Contract, Contact, Order, Asset, and Opportunity. The 'Edit' button for the table is highlighted with a red box. The table data is as follows:

Object	Default Internal Access	Default External Access
Lead	Public Read/Write/Transfer	Private
Account and Contract	Public Read/Write	Private
Contact	Controlled by Parent	Controlled by Parent
Order	Controlled by Parent	Controlled by Parent
Asset	Controlled by Parent	Controlled by Parent
Opportunity	Public Read/Write	Private

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.

Click on save.

Work Type Group	Public Read/Write	Private	<input type="checkbox"/>
Asset	Public Read/Write	Private	<input checked="" type="checkbox"/>
Asset Service	Public Read/Write	Private	<input checked="" type="checkbox"/>
Employee	Private	Private	<input checked="" type="checkbox"/>
Project	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Other Settings			
Standard Report Visibility <input checked="" type="checkbox"/> <small>i</small>		Manual User Record Sharing <input type="checkbox"/> <small>i</small>	Manager Groups <input type="checkbox"/> <small>i</small>
 1. <input type="button" value="Save"/> <input type="button" value="Cancel"/>			

1. This Setting is for all the Users Which have been Created.

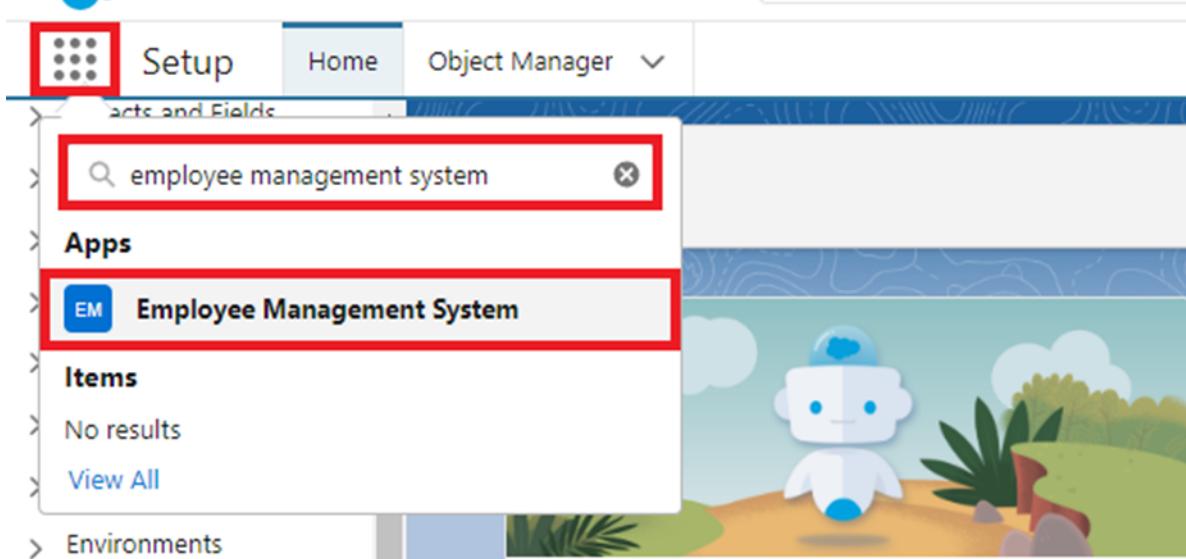
Set OWD as Private for Project and Asset Service objects.

6.User Adoption

As a new Administrator, I perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuring data access, and much more.

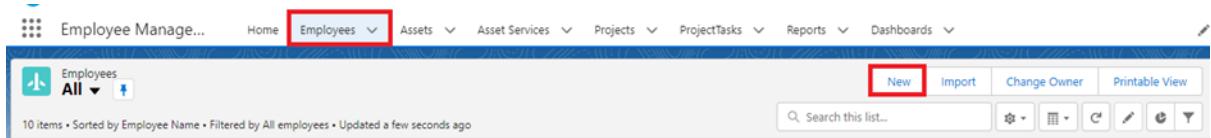
Create a Record (Employee)

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.

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

Delete a Record (Employee)

1. Here we can able to delete the record by doing above same steps and delete it.

7. Import Data

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

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

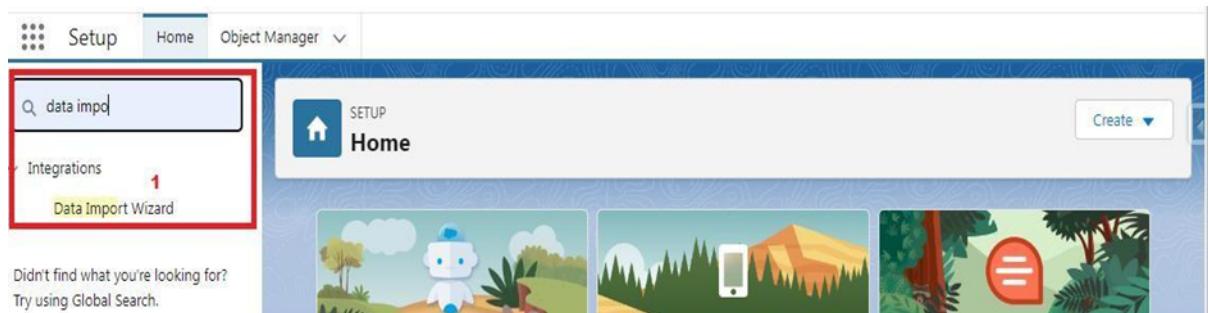
Data Import lets to upload data from external sources and combine it with data you collect via Analytics.

Use Analytics to organize and analyze all data in ways that better reflect your business.

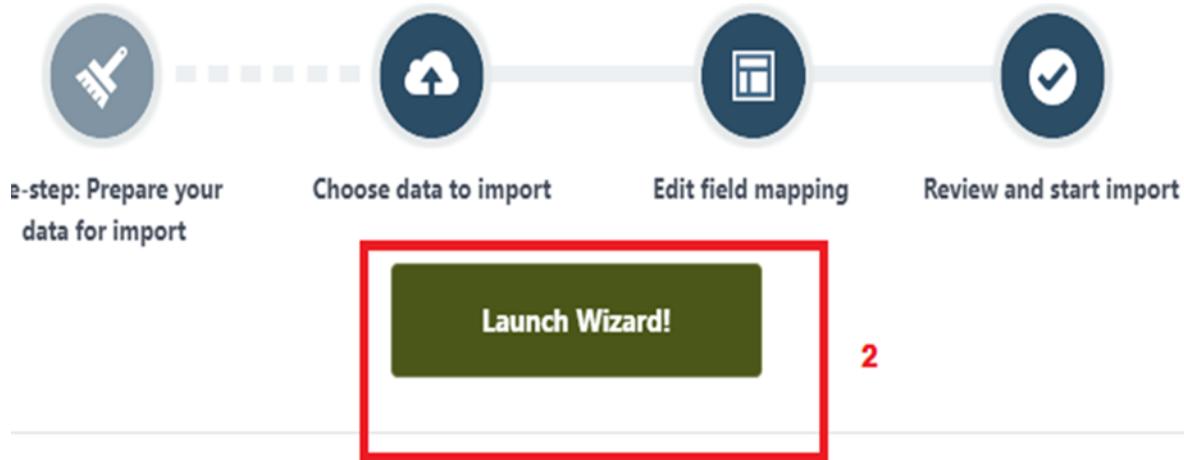
The Data Import Wizard is a Tool makes it easy to import data for many standard Salesforce objects, including accounts, contacts, leads, solutions, campaign members, and person accounts. You can also import data for custom objects.

Importing data using Data Wizard

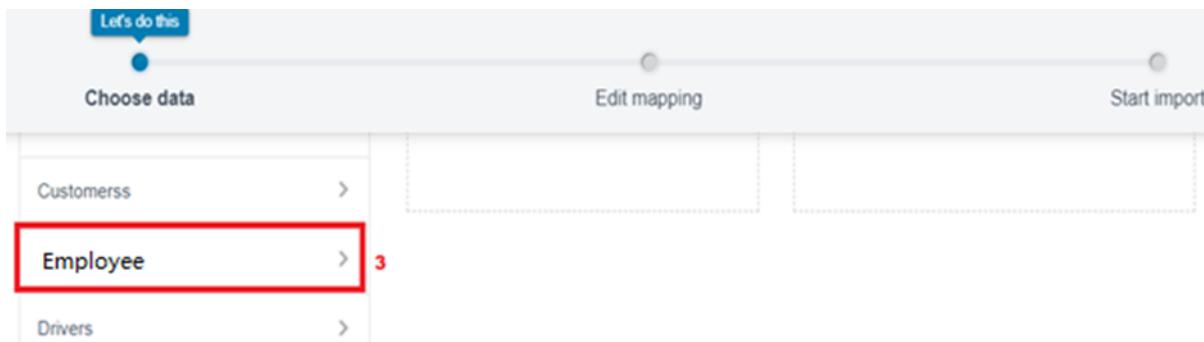
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



3. Click Launch Wizard!



4. Click the Custom Objects tab and select the Employee object.



5. Select Add new records.

Import your Data into Salesforce

You can import up to 50,000 records at a time.

What kind of data are you importing? [?](#)

- Standard objects
 - Custom objects
- Attendees >
- Buyers >

What do you want to do? [?](#)

- Add new records 4 >
- Update existing records >
- Add new and update existing records >

Where is your data located? [?](#)

1.

1. Click CSV and choose file Employee_CS1 which we made earlier. Click Next.

The screenshot shows the 'Edit mapping' step of the import wizard. The 'Add new records' option is selected and highlighted with a red box, labeled with a red number '4'. In the 'Where is your data located?' section, a CSV file named 'CSV' is uploaded and highlighted with a red box, labeled with a red number '5'. At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons, with the 'Next' button highlighted with a red box.

1. 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.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Employee Name	Employee Name	Jackie Chan	James	Benjamin
Change	Date of Birth	Date of Birth	01/01/1993	27/02/1998	16/03/1999
Change	Gender	Gender	Male	Male	Male
Change	Qualification	Qualification	B.Tech	B.Tech	B.Com
Change	Address	Address			
Change	Experience	Experience	9	6	5
Change	Phone no.	Phone no.	7905434750	7905434751	7905434752

Note: no need to map “Reports to” field. The Data Import Wizard is designed to handle basic data import tasks and does not support mapping relationships between records.

1. The next screen gives you a summary of your data import. Click Start Import.

Review & Start Import
Review your import information and click Start Import.

Your selections:	Your import will include:	Your import will not include:
Employees ✓ Add new records ✓ Employee - Data - Employee - Data.csv ✓	Mapped fields 19	Unmapped fields 0

2. Click OK on the popup.

Congratulations, your import has started!
Click OK to view your import status on the Bulk Data Load Job page.

OK

3. Scroll down the page and verify that your data has been imported under batches.

Batches												
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Memory Count	State Message	Status
View Request	View Result	751500000JeYH4	14/06/2023, 11:54 am	14/06/2023, 11:54 am	100	60	0	14	0	0	Completed	

4. Make sure you have 0 records under the records failed column.

8. Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

1. Contract Manager
2. Read Only
3. Marketing User
4. Solutions Manager
5. Standard User
6. System Administrator.

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. Custom Profiles:

Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.

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.

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	HR

Save **Cancel**

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.

Custom Object Permissions						
	Basic Access		Data Administration			
	Read	Create	Edit	Delete	View All	Modify All
Assets	<input checked="" type="checkbox"/>					
Asset Services	<input checked="" type="checkbox"/>					
Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Scroll down and Click on Save.

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.

Create Employee Profile

Create Employee Profiles for "On Site Employee", "Remote Employee" as in above, but in step 3 only allow permission access for Project and Project Task objects only.

9.Role

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Creating HR Role

1. Go to quick find --> Search for Roles --> click on set up roles.

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. The left sidebar has a 'Users' section with 'Roles' highlighted by a red box. Below 'Users' are sections for Sales, Service, and Case Teams. The main content area is titled 'Understanding Roles' with a sub-section 'Sample Role Hierarchy'. It shows a hierarchy from 'Executive Staff' down to 'Western Sales Director' and 'Eastern Sales Director', with descriptions of their permissions. At the bottom right of the main content area is a red box around the 'Set Up Roles' button.

2. Click on Expand All and click on add role under whom this role works.

The screenshot shows the 'Your Organization's Role Hierarchy' page. At the top left, there is a 'Collapse All' and 'Expand All' button, with 'Expand All' highlighted by a red box. The hierarchy tree shows 'Nick Enterprises' expanded, with 'CEO' and 'Manager' roles. Under 'CEO', the 'HR' role is selected and highlighted with a red box. Under 'HR', another 'Add Role' button is also highlighted with a red box.

3. Give Label as "HR" and Role name gets auto populated. Check to whom this role (HR) reports. Then click on Save.

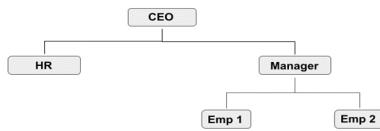
Role Edit
New Role

Role Edit

Label	<input type="text"/>
Role Name	<input type="text"/> ?
This role reports to	<input type="text"/> ?
Role Name as displayed on reports	<input type="text"/>

Save **Save & New** **Cancel**

4. Refer the below diagram to understand which role reports to which role.



Role Hierarchy: The above diagram represents which role reports to which one.

Creating more roles

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

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

10.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.

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. Each user account contains at least the following:

1. Username
2. Email Address
3. User's First Name (optional)
4. User's Last Name
5. Alias
6. Nickname
7. License
8. Profile
9. Role (optional)

Create User

1. Go to setup --> type users in quick find box --> select users --> click New user.

2. Fill in the fields

1. First Name : Niklaus
2. Last Name : Mikaelson
3. Alias : Give a Alias Name
4. Email id : Give your Personal Email id
5. Username : Username should be in this form: text@text.text
6. Nick Name : Give a Nickname
7. Role : HR
8. User license: Salesforce
9. Profiles : HR

User Edit

Save Save & New Cancel

General Information

First Name: Niklaus
 Last Name: Mikaelson
 Alias: nmika
 Email: (redacted)
 Username: nlarkin@MNwhite.com
 Nickname: Niklaus

Role: HR
 User License: Salesforce
 Profile: HR

Marketing User
 Offline User
 Knowledge User
 Flow User
 Service Cloud User
 Site.com Contributor User
 Site.com Publisher User
 WDC User

Data.com User Type: --None--
 Data.com Monthly Addition Limit: Default Limit (300)
 Accessibility Mode (Classic Only)
 High-Contrast Palette on Charts
 Load Lightning Pages While Scrolling (checked)
 Debug Mode

3. Save.

Creating another user

1. Go to setup --> type users in quick find box --> select users --> click New user.

2. Fill in the fields

- 1 First Name : Kol
- 2 Last Name : Mikaelson
- 3 Alias : Give a Alias Name
- 4 Email id : Give your Personal Email id
- 5 Username : Username should be in this form: text@text.text
- 6 Nick Name : Give a Nickname
- 7 Role : Manager
- 8 User license : Salesforce Platform
- 9 Profiles : Manager

3. Save.

Creating more users

Create two more users as we created in above.

11. Page layouts

Page Layout in Salesforce allows us to customize the design and organize detail 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.

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.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'Employee' typed in. Below it, a table lists one item: 'Employee' with API name 'Employee__c', Type 'Custom Object', Last Modified on '31/05/2023', and a Deployed status. On the right side of the table, there's an 'Edit' button highlighted with a red box.

1. Click on Page layout --> Click on New.

The screenshot shows the 'Page Layouts' section of the Employee object setup. It lists one page layout named 'Employee Layout'. A 'New' button is highlighted with a red box at the top right of the list area.

1. Give Page layout Name as "On Site Employee Layout" and click on Save.

Create New Page Layout

The screenshot shows the 'Create New Page Layout' dialog. It has a note at the top: 'As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard fields and behaviors of the original layout.' Below this, there are two input fields: 'Existing Page Layout' containing 'Employee Layout' and 'Page Layout Name' containing 'On Site Employee Layout'. A 'Save' button is highlighted with a red box at the bottom right.

1. Drag and drop the Section from the highlight panel below the Information and name it as "Personal Information" and click Ok.
2. Drag Date of Birth, Address and Age fields from Employee Information to Personal Information section.
3. Similarly perform the above step to create "Allowances" and add allowances fields in it as shown below.

Creating another page layout

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

The screenshot shows the Salesforce Page Layout Editor. At the top, there are buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. A search bar labeled 'Quick Find Field Name' is also present.

The 'Fields' tab is selected, showing a list of available fields: Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, Report Charts, Section, and Blank Space. The 'Section' field is highlighted with a red box.

The main area displays three sections:

- Information (Header visible on edit only):**

Employee ID	GEN-2004-001234	Owner	Sample Text
Employee Name	Sample Text	Reports to	Sample Text
Gender	Sample Text	Qualification	Sample Text
Experience	Sample Text	Phone no	1-415-555-1212
Email	sarah.sample@company.com	Mode of Work	Sample Text
Joining date	21/06/2023	Login Time	Sample Text
LinkedIn Profile	www.salesforce.com	Logout Time	Sample Text
- Personal Information:**

Date of Birth	21/06/2023	Age	50.12
Address	Sample Text		
- Allowances:**

Cab Allowance	✓	Cab Allowance Amount	₹123.45
Food Allowances	✓	Food Allowance Amount	₹123.45

A note at the bottom left says "Customs Information (Header visible on edit only)".

1. Click Save.
2. Make sure your page layout looks like the picture above.

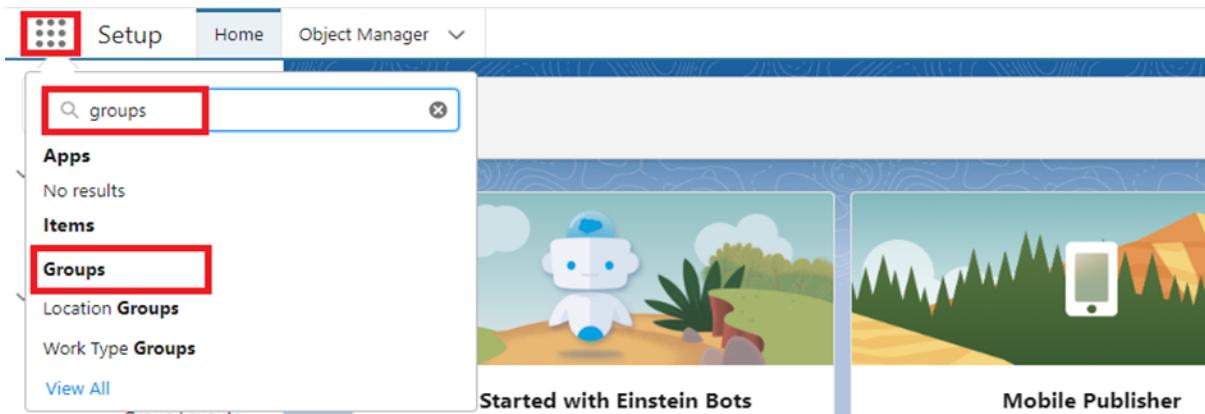
12.Chatter Group

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

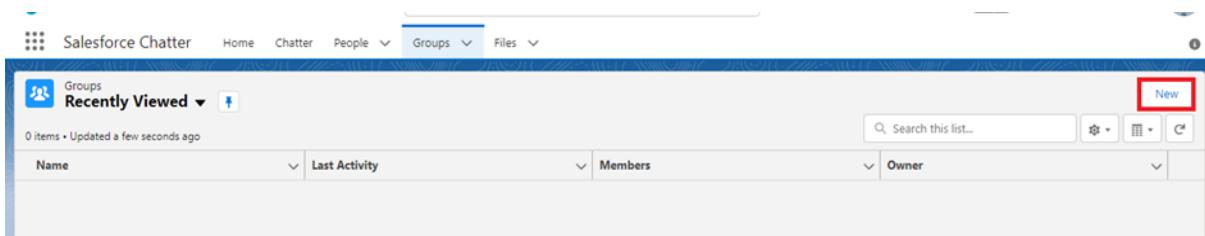
Creating a chatter group for your organization.

To Create a chatter group:

1. Click the App Launcher.
2. Enter Groups in the Search apps and items... box and select Groups.

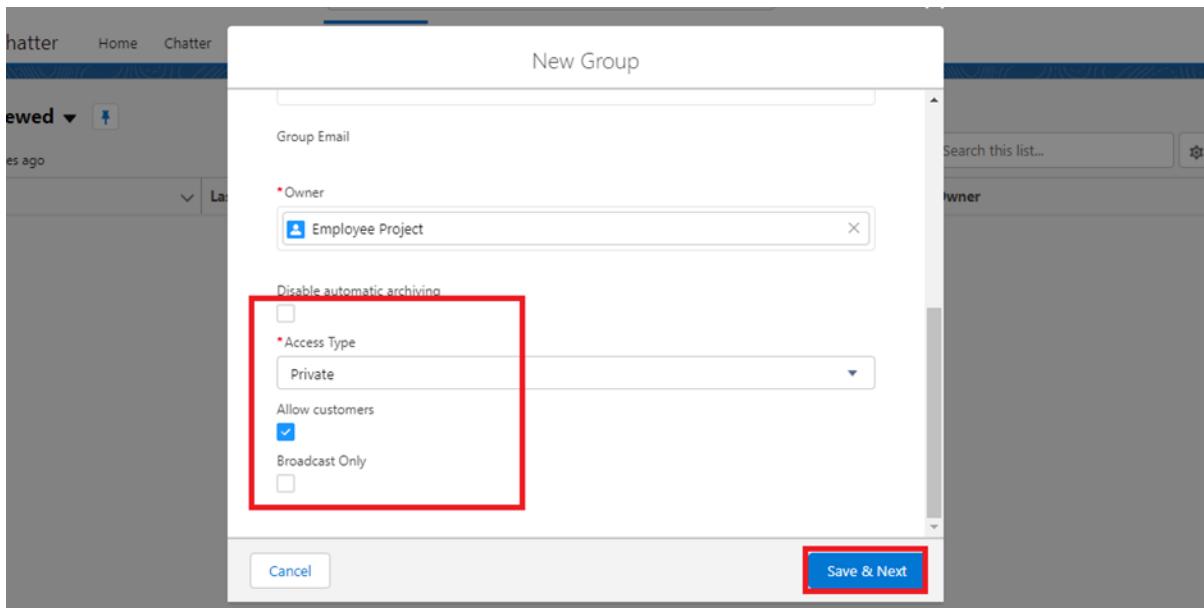
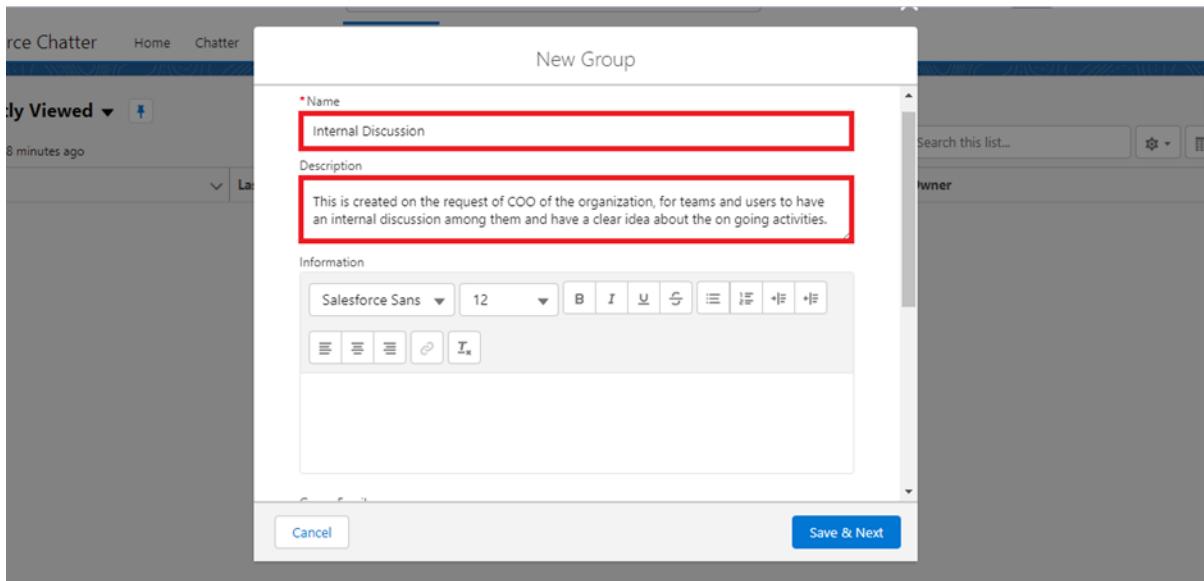


3. Click New.



4. Fill in the new group information with these details:

Field	Value
1 Group Name	Internal Discussion
2 Description	Give a understanding Description on your own
3 Access Type	Private
4 Allow Customers	Checked



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

Manage Members

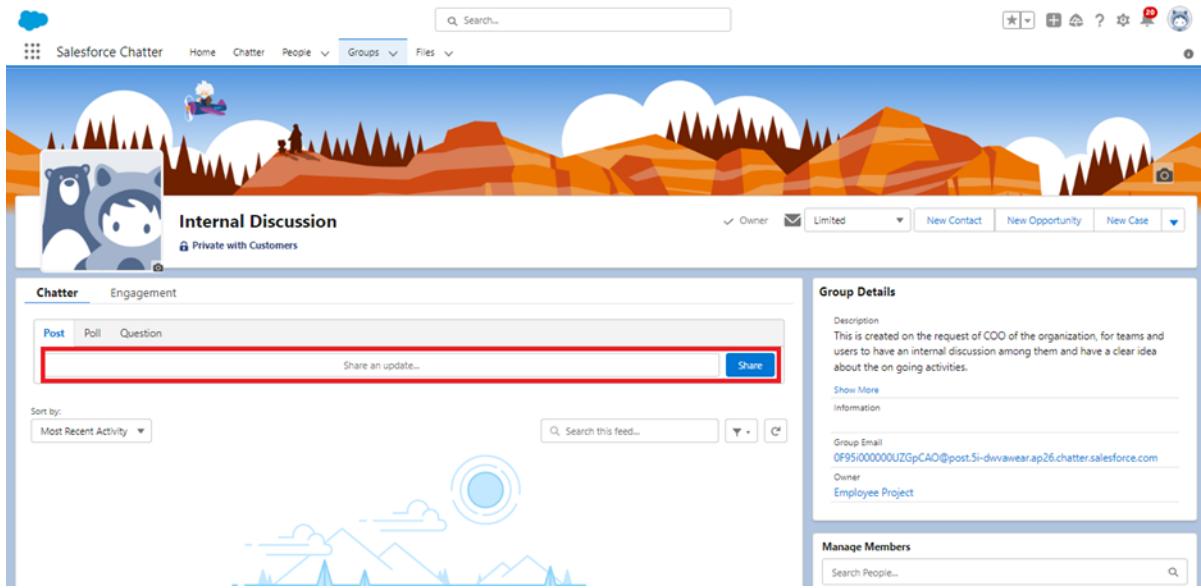
The screenshot shows a list of team members in a management interface. At the top left is a search bar labeled "Search People..." with a magnifying glass icon. Below it is a table with four rows, each representing a member:

Profile Picture	Member Name	X	Role Selection
	Jason Mikaelson	X	Member ▾
	Elijah Mikaelson	X	Member ▾
	Kol Mikaelson	X	Member ▾

At the bottom right of the list area is a blue button with a plus sign and the word "Add". A red box highlights the entire list area, and another red box highlights the "Add" button.

At the bottom right of the main window is a blue "Done" button.

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 Internal Discussion Group, here you can post anything which is related to ongoing projects.

10. Click Share.

Note: You can like or comment on this post.

Note: there is a default chatter group in the org with all the active users in it, this activity is to show you how to create a chatter group and add users into it.

13. Record Types

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

Creating On Site Employee Record Type

To create a Record Type:

1. Go to Setup --> click on Object Manager --> Search for the object (Employee) --> from drop down click Edit.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Employee'. Below the header, the 'Object Manager' title is visible with a subtitle '1 items. Sorted by Label'. A table lists one item: 'Employee' with API name 'Employee__c' and type 'Custom Object'. The 'Edit' button in the last column is highlighted with a red box. The entire row for 'Employee' is also highlighted with a red box.

2. From the left panel click Record Types --> New.

The screenshot shows the 'Record Types' page for the 'Employee' object. The left sidebar has links for 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', and 'Record Types'. The 'Record Types' link is highlighted with a red box. The main content area shows a table titled 'Record Types' with columns 'RECORD TYPE LABEL', 'DESCRIPTION', 'ACTIVE', and 'MODIFIED BY'. A 'New' button in the top right corner is highlighted with a red box. The message 'No items to display.' is shown at the bottom.

3. Give Record Type Label as "On Site Employee" and make it active.

Step 1. Enter the details Step 1 of 2

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type	Existing Record Type: <input style="border: none; padding: 0; margin: 0;" type="button" value="--Master--"/> Record Type Label: <input type="text" value="On Site Employee"/> Record Type Name: <input type="text" value="On_Site_Employee"/> Description: <input style="height: 40px;" type="text"/> Active: <input checked="" type="checkbox"/>	= Required Information
-------------	---	------------------------

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>

4. Uncheck for “Make Available”.

Profile Name	Record Types Currently Available	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter Free User		<input type="checkbox"/>	<input type="checkbox"/>

5. Scroll down and check for the Manager & System Administrator profile and click on Next.

Force.com - Free User	<input type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
HR	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	<input type="checkbox"/>	<input type="checkbox"/>
Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input type="checkbox"/>	<input type="checkbox"/>
On Site Employee	<input type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input type="checkbox"/>	<input type="checkbox"/>
Remote Employee	<input type="checkbox"/>	<input type="checkbox"/>
Salesforce API Only System Integrations	<input type="checkbox"/>	<input type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input type="checkbox"/>	<input type="checkbox"/>
Standard User	<input type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Work.com Only User	<input type="checkbox"/>	<input type="checkbox"/>

6. Select “Apply a different layout for each profile”, and change page layout to On Site Employee Layout for manager profile and System Administrator.

Employee Record Type: On Site Employee
Record Type Name: On_Site_Employee
Description:

Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.

Apply one layout to all profiles Apply a different layout for each profile

Profile:	Page Layout
Analytics Cloud Integration User	Employee Layout
Analytics Cloud Security User	Employee Layout
Custom: Sales Profile	Employee Layout
Custom: Support Profile	Employee Layout
Force.com - App Subscription User	Employee Layout
Force.com - Free User	Employee Layout
Gold Partner User	Employee Layout
HR	Employee Layout
Identity User	Employee Layout
Manager	On Site Employee layout
Marketing User	Employee Layout
Minimum Access - Salesforce	Employee Layout
On Site Employee	Employee Layout
Partner App Subscription User	Employee Layout
Partner Community Login User	Employee Layout
Partner Community User	Employee Layout
Read Only	Employee Layout
Remote Employee	Employee Layout
Salesforce API Only System Integrations	Employee Layout
Silver Partner User	Employee Layout
Solution Manager	Employee Layout
Standard Platform User	Employee Layout
Standard User	Employee Layout
System Administrator	On Site Employee layout
work.com Only User	Employee Layout

Previous Save & New Cancel

7. click Save.

Creating "Remote Employee" Record Type

Create another Record Type with name "Remote Employee" as above.

14.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.

Creating a permission set

To Create a Permission Set:

1. Go to setup --> type “permission sets” in quick search --> select permission sets --> New.

The screenshot shows the Salesforce Setup interface. The top navigation bar has 'Setup' selected. Below it, the 'Permission Sets' page is displayed. On the left sidebar, 'Permission Sets' is highlighted with a red box. The main content area shows a table of existing permission sets like 'Buyer', 'CRM User', etc., with a 'New' button at the top left of the table. A red box highlights the 'New' button. The table columns are 'Action', 'Permission Set Label +', 'Description', and 'License'. The 'Description' column contains brief descriptions of each permission set, and the 'License' column lists the specific licenses required for each.

2. Enter the label name as “Per to Emp” --> Save.

The screenshot shows the 'Create Permission Set' form. At the top, there are 'Save' and 'Cancel' buttons. The form has a section titled 'Enter permission set information'. It includes fields for 'Label' (containing 'Per to Emp'), 'API Name' (containing 'Per_to_Emp'), and 'Description'. A 'Session Activation Required' checkbox is also present. The 'Label' and 'API Name' fields are highlighted with a red box.

3. Under Apps Select object settings.

Apps

Assigned Apps Settings that specify which apps are visible in the app menu
Assigned Connected Apps Settings that specify which connected apps are visible in the app menu
Object Settings Permissions to access objects and fields, and settings such as tab availability
App Permissions Permissions to perform app-specific actions, such as "Manage Call Centers"
Apex Class Access Permissions to execute Apex classes
Visualforce Page Access Permissions to execute Visualforce pages
External Data Source Access Permissions to authenticate against external data sources
Flow Access Permissions to execute Flows
Named Credential Access Permissions to authenticate against named credentials
Custom Permissions Permissions to access custom processes and apps
Custom Metadata Types Permissions to access custom metadata types
Custom Setting Definitions Permissions to access custom settings

4. Click on Employee object --> click on Edit --> under object permission check for read and create.

Permission Set
Adding Employee

Find Settings... * | Clone | Edit Properties | Manage Assignments

Permission Set Overview > Object Settings ▾ Employees ▾

Employees Save Cancel

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 

Employee: Record Type Assignments

Record Types	Assigned Record Types
On Site Employee	<input checked="" type="checkbox"/>
Remote Employee	<input type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

5. Click on Save.

6. After saving the permission click on the Manage assignment

The screenshot shows the Salesforce 'Permission Sets' interface. At the top, there's a blue header bar with the word 'SETUP'. Below it is a section titled 'Permission Set' with a subtitle 'Adding Employee'. A navigation bar at the top includes 'Find Settings...', 'Clone', 'Edit Properties', and 'Manage Assignments' (which is highlighted with a red box). Below the navigation is a breadcrumb trail: 'Permission Set Overview > Object Settings > Employees'. The main area is titled 'Employees' and has an 'Edit' button. Underneath is a 'Tab Settings' section with a table:

Available	Visible
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

7. Now click on the Manage Assignment.

This screenshot shows the 'Adding Employee' permission set details page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar shows 'Users' expanded, with 'Permission Set Groups' and 'Permission Sets' selected. The main content area is titled 'Adding Employee' and shows the 'Current Assignments' section. It contains two icons: a cloud and a user profile. To the right is an 'Add Assignment' button, which is highlighted with a red box.

8. Click on Add Assignment.

This screenshot shows the 'Select Users to Assign' dialog. The title is 'Select Users to Assign' and it says 'All Users' with a dropdown arrow. There is a note '1 item selected'. The main area is a table with columns: 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. One row for 'Elijah Mikaelson' is highlighted with a red box. The 'Role' column shows 'On Site Employee', 'Active' is checked, and 'Profile' is 'Chatter Free User'. The 'Next' button at the bottom right is also highlighted with a red box.

Full Name	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty.00d5i00000ewzcbea5.165f3eew2or@chatter.salesforce.com	On Site Employee	<input checked="" type="checkbox"/>	Chatter Free User
demo project	dproj	nadeem@smart.com	System Administrator	<input checked="" type="checkbox"/>	
Elijah Mikaelson	emika	elijah@smart.com	On Site Employee	<input checked="" type="checkbox"/>	On Site Employee
Integration User	integ	integration@00d5i00000ewzcbea5.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	
Jason Mikaelson	jmika	jason@smart.com	Remote Employee	<input checked="" type="checkbox"/>	Remote Employee
Kol Mikaelson	kmika	kol@smart.com	Manager	<input checked="" type="checkbox"/>	Manager
Niklaus Mikaelson	nmika	nikmik@smart.com	HR	<input checked="" type="checkbox"/>	HR

9. Now select the users(any one user with the profile "On Site Employee") and click on Next.
10. Click on Assign
11. Click on Done.

15. Reports

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

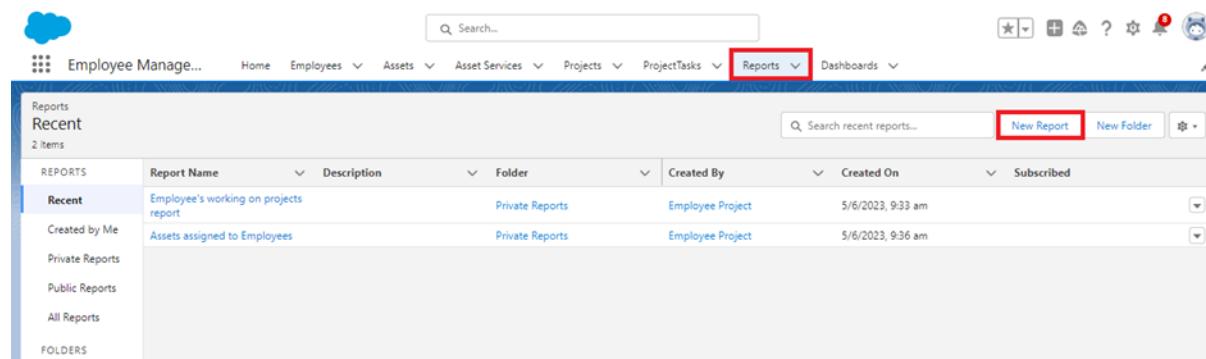
Types of Reports in Salesforce

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

Create Report

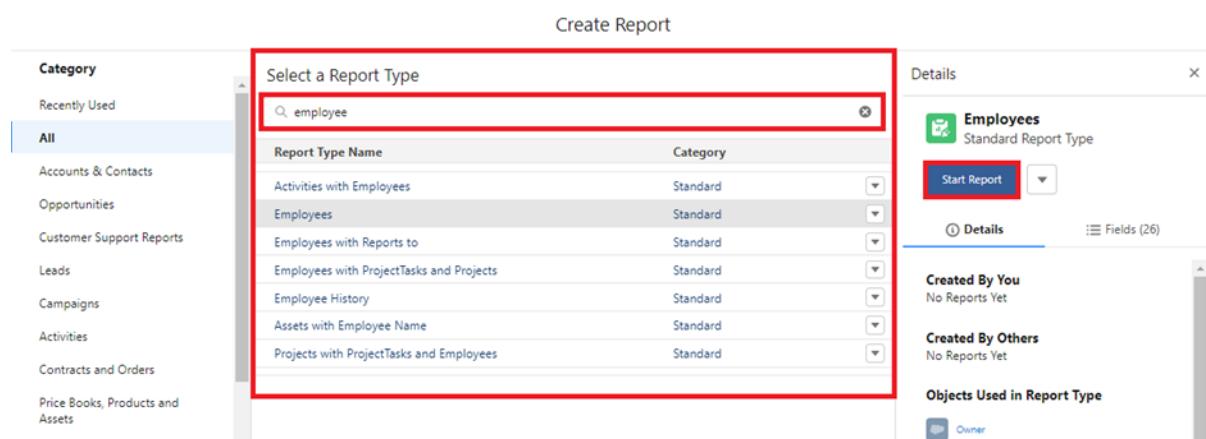
To Create a Report:

1. Go to the app --> click on the reports tab
2. Click New Report.



The screenshot shows the Salesforce Reports page. At the top, there's a navigation bar with links for Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports (which is highlighted with a red box), and Dashboards. Below the navigation is a search bar labeled 'Search...'. On the left, there's a sidebar with sections for Reports (Recent, 2 items), Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), and Folders. The main area displays a table of recent reports. The first report, 'Employee's working on projects report', is selected. The table columns include Report Name, Description, Folder, Created By, Created On, and Subscribed. A 'New Report' button is located at the top right of the main area, also highlighted with a red box.

3. Select report type from category or from report type panel or from search panel --> click on start report.



The screenshot shows the 'Create Report' dialog. On the left, there's a sidebar with categories like Recently Used, All, Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, and Price Books, Products and Assets. The 'All' category is selected. In the center, a search bar says 'Select a Report Type' with 'employee' typed in. Below it is a table of report types, with 'Employees' highlighted. The table columns are Report Type Name and Category. To the right, there's a 'Details' panel for the 'Employees' report type, which includes a 'Start Report' button, a 'Details' section (with 'Created By You' and 'Created By Others' both showing 'No Reports Yet'), and a 'Objects Used in Report Type' section (with 'Owner').

4. Customize your report

--> Add fields from left pane as shown below

The screenshot shows the 'Employee Management' software interface with the 'Reports' tab selected. A red box highlights the 'Outline' and 'Filters' sections on the left. Another red box highlights the 'Columns' section and the 'Add column...' button. The main preview area shows a table with two rows of employee data:

Employee	Employee Name	Employee ID	Reports to	Login Time	Logout Time	Mode of Work	LinkedIn Profile
Employee	a025-00000HqY0	-	-	-	-	-	http://LinkedIn
Emp for Junc test	a025-00000HqY1	-	-	8:00 am	9:00 pm	-	http://LinkedIn

At the top right, there are buttons for 'Save & Run', 'Save', 'Close', and 'Run'. A checkbox for 'Update Preview Automatically' is checked.

5. Save or run it.

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

Create 2 more Report

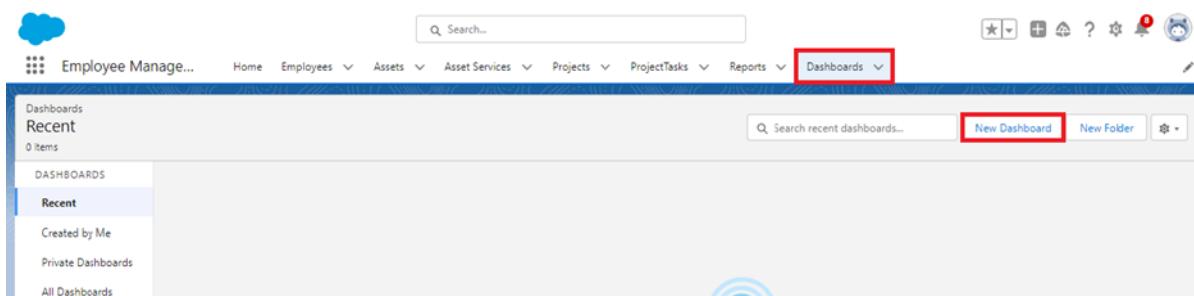
1. Create a report with report type: "Employees with ProjectTasks and Projects".
2. Create a report with report type: "Employees with Assets".

16.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.

To Create a Dashboard

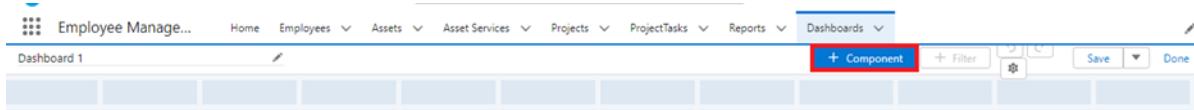
1. Go to the app --> click on the Dashboards tabs.



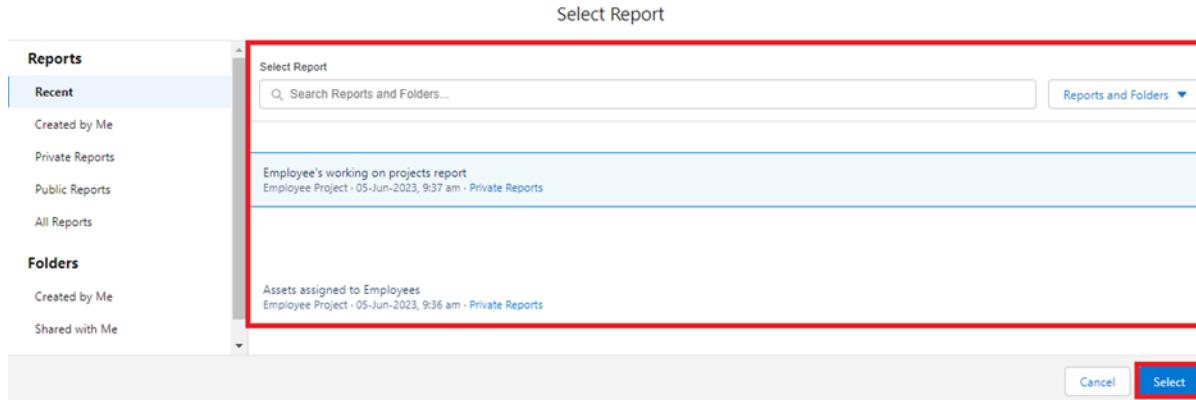
2. Give a Name and click on Create.

A screenshot of the 'New Dashboard' creation dialog. It has three input fields: 'Name' (containing 'Dashboard 1'), 'Description' (empty), and 'Folder' (containing 'Private Dashboards'). Below these fields are two buttons: 'Cancel' and 'Create', with 'Create' being highlighted with a red box.

3. Select add component.



4. Select a Report and click on select.



5. Click Add then click on Save and then click on Done.

Create another Dashboard as above.