

# WORKFORCE ADMINISTRATION SOLUTION



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## **PROJECT ABSTRACT:**

Workforce Administration in Salesforce focuses on effectively managing an organization's human resources through the Salesforce ecosystem. This approach involves the strategic oversight of employee activities, aimed at optimizing productivity and fostering employee engagement. Utilizing Salesforce's comprehensive suite of tools, companies can enhance various HR functions, including hiring, onboarding, performance evaluation, and ongoing employee development.

This overview emphasizes the use of features like Salesforce Essentials and Salesforce Service Cloud, which facilitate efficient workforce management. Key functionalities include automated processes, data analytics for tracking performance, and customizable dashboards that offer real-time insights into workforce dynamics. Additionally, Salesforce enhances team collaboration through tools like Chatter and Communities, promoting effective communication across departments.

Implementing workforce administration within Salesforce not only streamlines HR operations but also improves employee morale by centralizing tasks related to human resources. By aligning workforce initiatives with broader business objectives, organizations can respond more effectively to market changes. In essence, Salesforce acts as a vital resource in workforce administration, supporting both employee performance and overall business growth.

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# **SALESFORCE**

## Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

## What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3lGde5k>

## Activity 1: Creating Developer Account

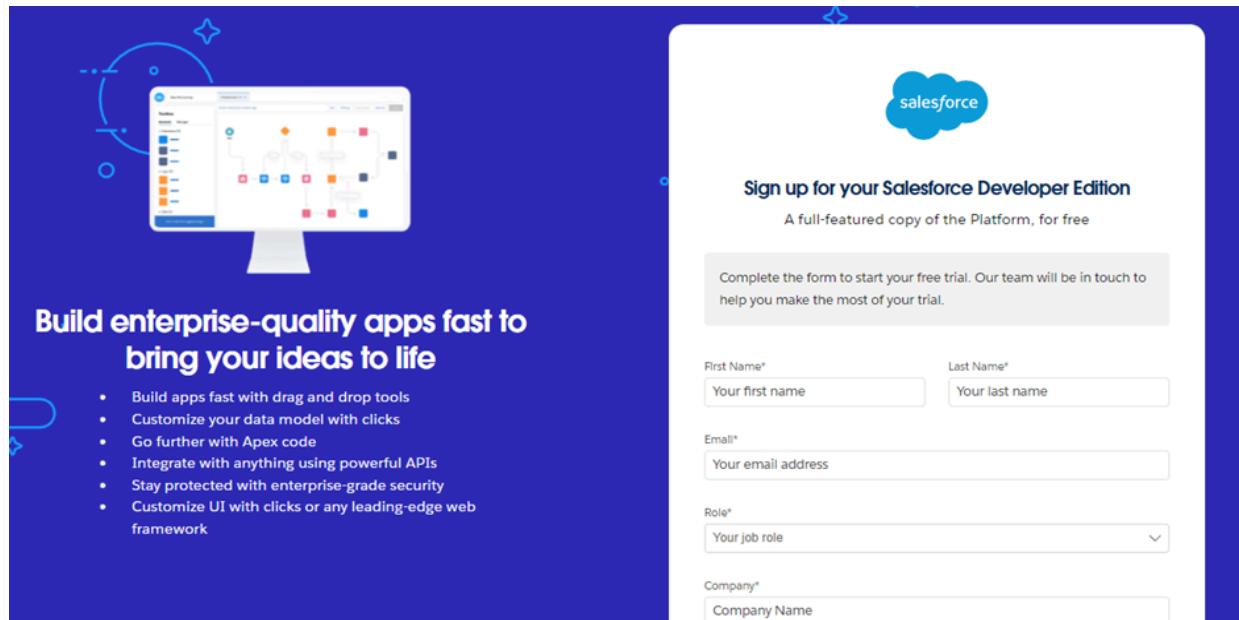
Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :

- 1) First name & Last name
- 2) Email
- 3) Role : Developer
- 4) Company : College Name
- 5) County : India
- 6) Postal Code : pin code
- 7) Username : should be a combination of your name and company
- 8) Click on Sign me up.

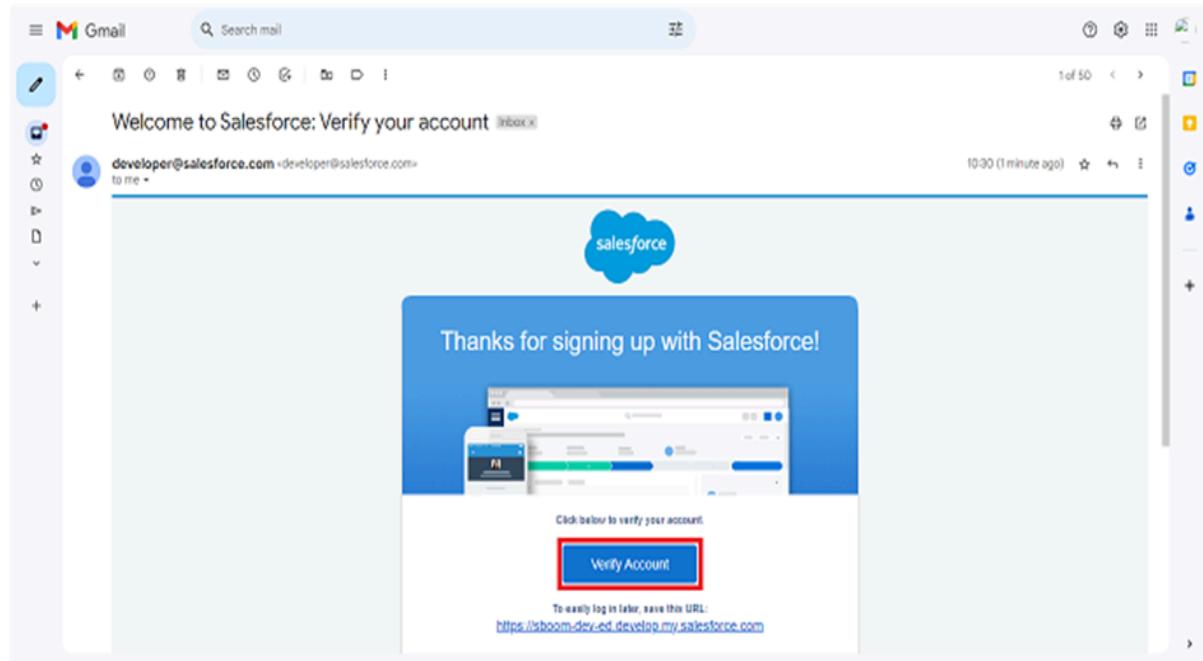
This need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign me up after filling these.



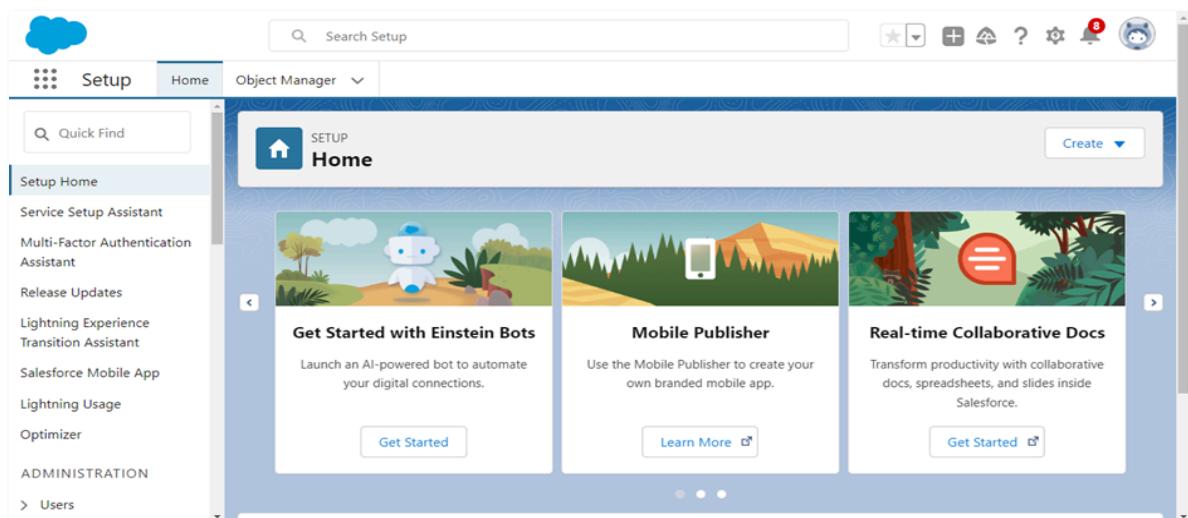
## Activity 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

4. Then you will redirect to your salesforce setup page.



# Object

## What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

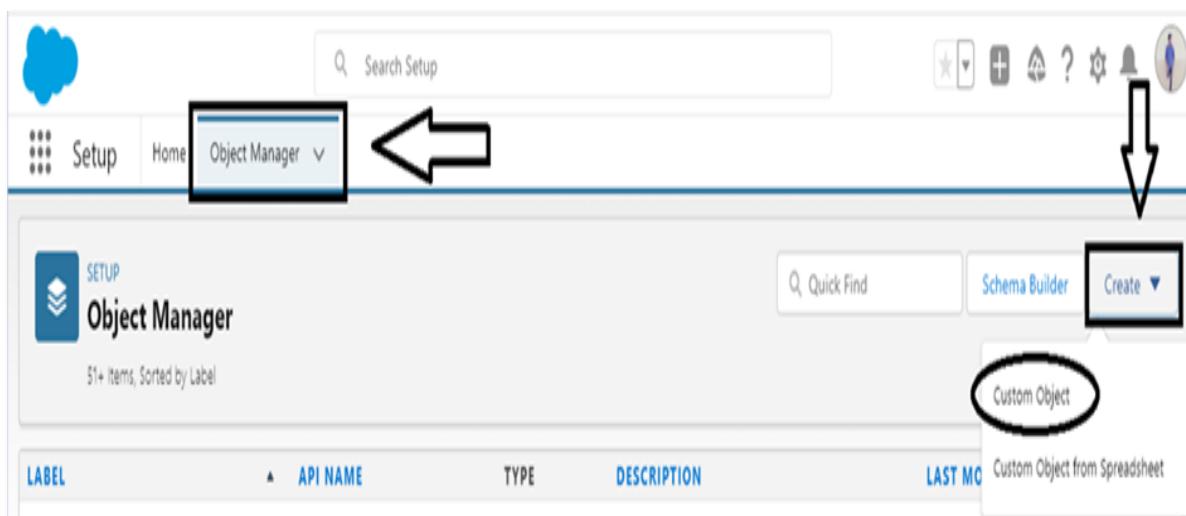
1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization.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

## Activity 1: Create Employee Object

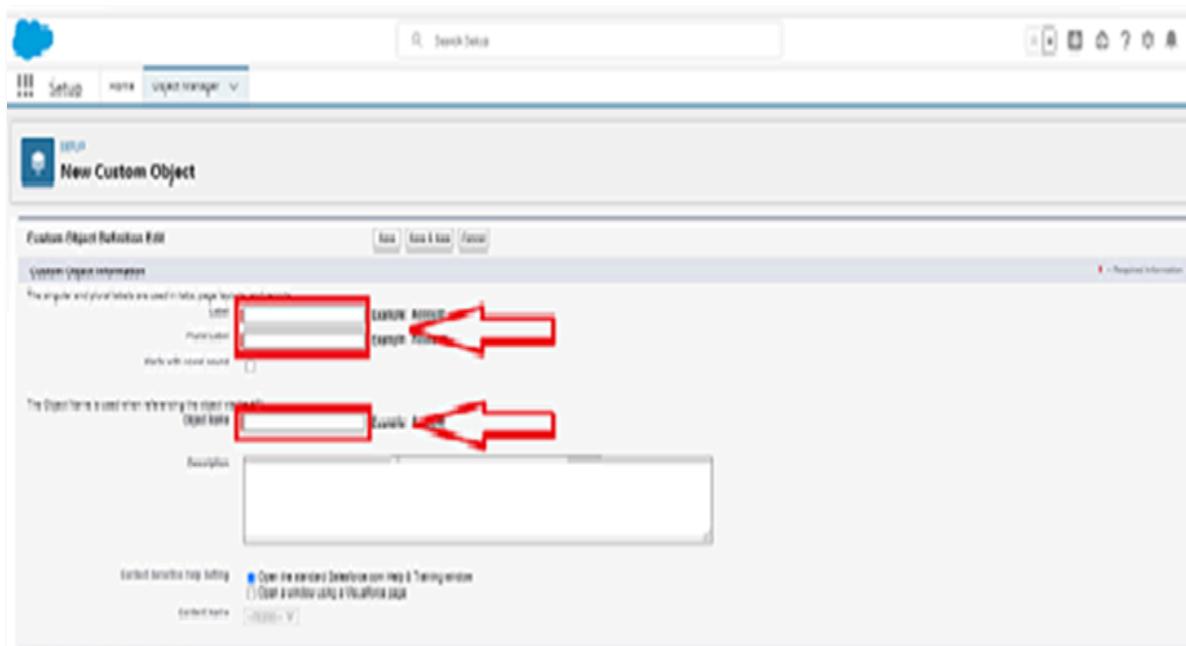
The purpose of creating an Employee custom object is to keep track the employee's activities and their individual and as well as team progress.

To create an object:

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



- 1) Enter the label name: Employee
- 2) Plural label name: Employees



- 3) Enter Record Name Label and Format
  - 1 Record Name : Employee ID
  - 2 Data Type : Auto Number
  - 3 Display Format : EMS-{0000}
  - 4 Starting Number : 1

### Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Record Name". The Record Name field is always called "Name" when referenced via the API.

Record Name	<input type="text" value="Employee Id"/>	Example: Account Name
Data Type	<input type="text" value="Auto Number"/>	
Display Format	<input type="text" value="EMS-{0000}"/>	Example: A-{0000} <a href="#">What Is This?</a>
Starting Number	<input type="text" value="1"/>	

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

# Tabs

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

Types of Tabs:

## 1. Custom Tabs

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

## 2. Web Tabs

Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

## 3. Visualforce Tabs

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

## 4. Lightning Component Tabs

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

## 5. Lightning Page Tabs

Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Lightning Page tabs don't work like other custom tabs. Once

created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

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

To create a Tab:(Employee)

1. Go to setup page --> type Tabs in Quick Find bar --> click on tabs --> New (under custom object tab )

The screenshot shows the Salesforce Setup interface with two main sections:

- Custom Tabs:** The title is "Custom Object Tabs". It displays the message "No Custom Object Tabs have been defined". To the right, there is a "New" button highlighted with a red box and a "What Is This?" link.
- Web Tabs:** The title is "Web Tabs". It displays the message "No Web Tabs have been defined". To the right, there is a "New" button and a "What Is This?" link.

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.

## Activity 3: Creating tabs for remaining objects

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

# The Lightning App:

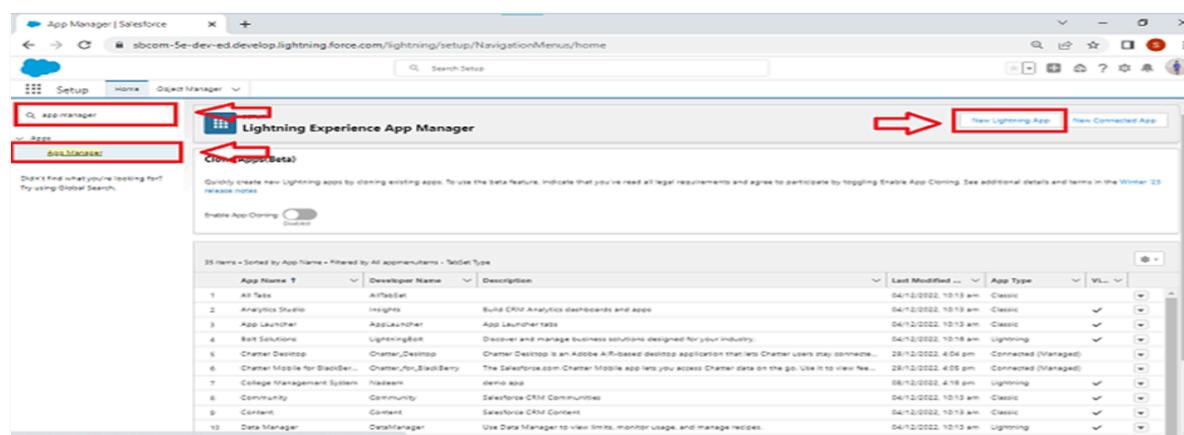
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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.

## Activity 1: Create a Lightning App

To create a lightning app page:

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



2. Fill the app name in app details and branding as follow

AppName: Workforce Administrator Solution

Developer Name : this will auto populated

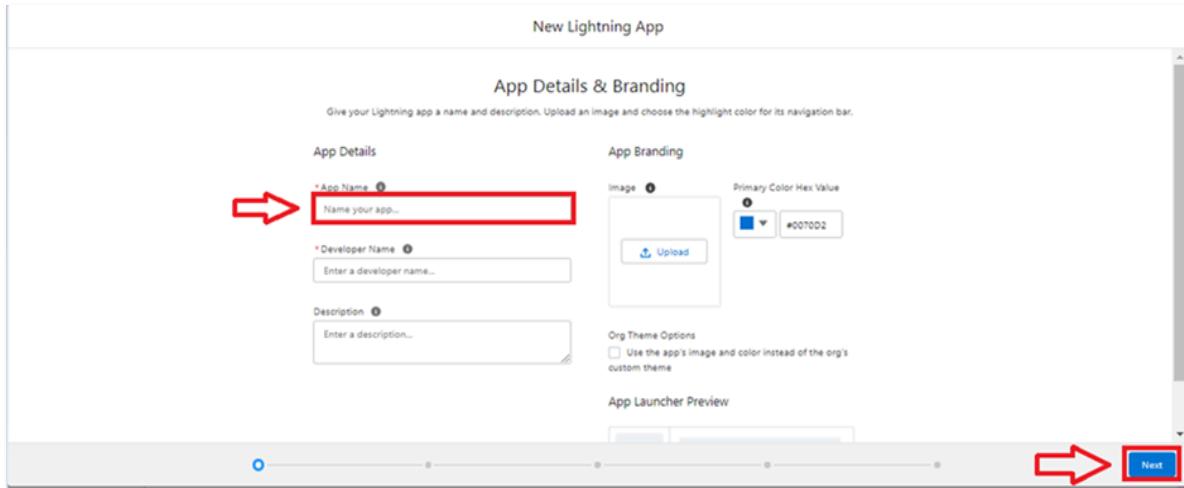
Description : Give a meaningful description

Image : optional (if you want to give any image you can otherwise

not mandatory)

Primary color hex value : keep this default

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



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.

5. 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

#### 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.

## **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

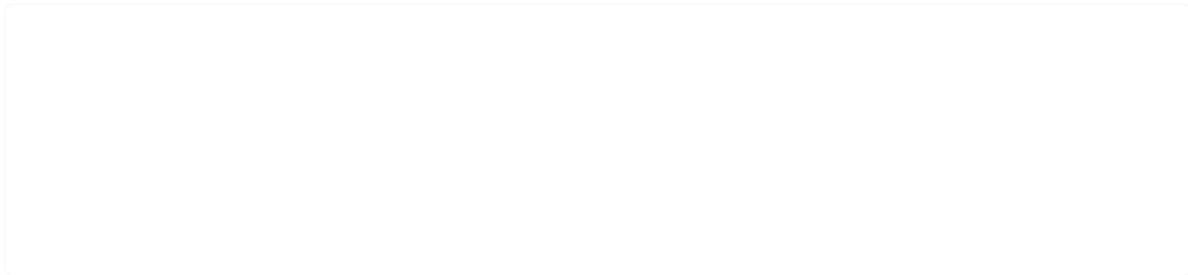


5. Fill the above as following:

- 1 Field Label: Employee Name
- 2 Length :18
- 3 Field Name : gets auto generated
- 4 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.

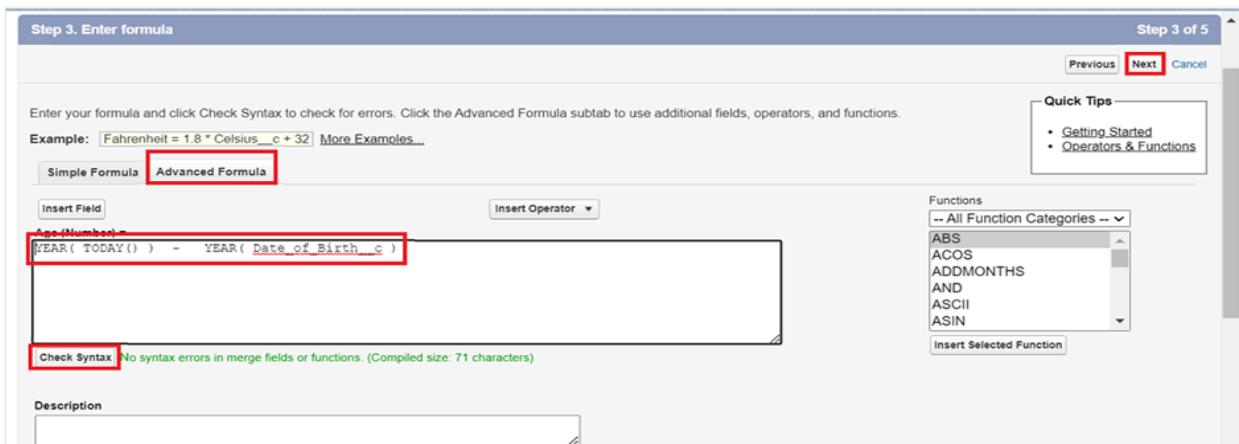


3. Click on Next.
4. Fill the above as following:
  - a. Field Label: Date of Birth.
  - b. Field Name : gets auto generated.
  - c. Click on Next --> Next --> Save and new.

## **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 Field Name 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.

Step 2. Enter the details Step 2 of 4

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:

Previous Next Cancel

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

## Activity 5 : 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.

Employee New Relationship Help for this Page

Step 2. Choose the related object Step 2

Select the other object to which this object is related.

Related To: Employee

Previous Next Cancel

Previous Next Cancel

4. Give Field Label as “Reports to” and click Next.
5. 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 --> 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.

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

Now create the remaining fields using the data types mentioned in the table.

Sl No	Object Name	Field	
		Field Name	Data type
		1 Qualification	Text
		2 Address	Text Area
		3 Experience	Text Area

		4 Phone no	Phone
		5 Email	Email
		6 Joining date	Date
		7 Mode of Work	Picklist: Values  On Site Remote
		8 Cab Allowance	Check box
		9 Food Allowances	Check box
		10 Wifi Allowances	Check box
1	Employee	11 Cab Allowance Amount	Currency
		12 Food Allowance Amount	Currency
		13 Wifi Allowance Amount	Currency
		14 Login Time	Time
		15 Logout Time	Time
		16 LinkedIn Profile	url
		Field Name	Data type

			1	Project Name	Text
			2	Project Lead	Text
			3	Start Date	Date
			4	End Date	Date
2	Project		5	Project Status	Picklist: Values  Completed On Going Not Yet Started

## 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

## 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.

The screenshot shows the 'Sharing Settings' page in Salesforce. The 'Organization-Wide Defaults' section is selected. It lists various objects with their default internal and external access levels. The 'Employee' object is highlighted with a red box around its row. The 'Internal' dropdown for Employee is set to 'Private', and the 'External' dropdown is also set to 'Private'. A checkmark is present in the 'Grant Access Using Hierarchies' checkbox column for this row. Other objects listed include Work Type Group, Asset, Asset Service, Project, and Other Settings. At the bottom of the page are 'Save' and 'Cancel' buttons.

3. Search for the Employee object.
4. Under default internal access and default external access change the options to “Private” and under grant access using hierarchies select the check box.
5. Click on save.

The screenshot shows the 'Sharing Settings' page in Salesforce. The 'Organization-Wide Defaults' section is selected. The 'Employee' object is highlighted with a red box around its row. The 'Internal' dropdown for Employee is set to 'Private', and the 'External' dropdown is also set to 'Private'. A checkmark is present in the 'Grant Access Using Hierarchies' checkbox column for this row. Other objects listed include Work Type Group, Asset, Asset Service, Project, and Other Settings. At the bottom of the page are 'Save' and 'Cancel' buttons.

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

## Activity 2:

Set OWD as Private for Project and Asset Service objects.

# User Adoption

## Activity 1: Create a Record (Employee)

**Click on App Launcher on the left side of the screen.**

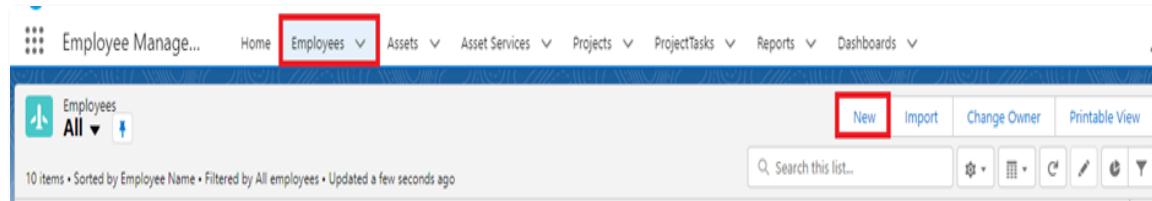
1. Search Employee Management System & click on it.



2. Click on the Employee tab.

3. Click

New.



4. 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>

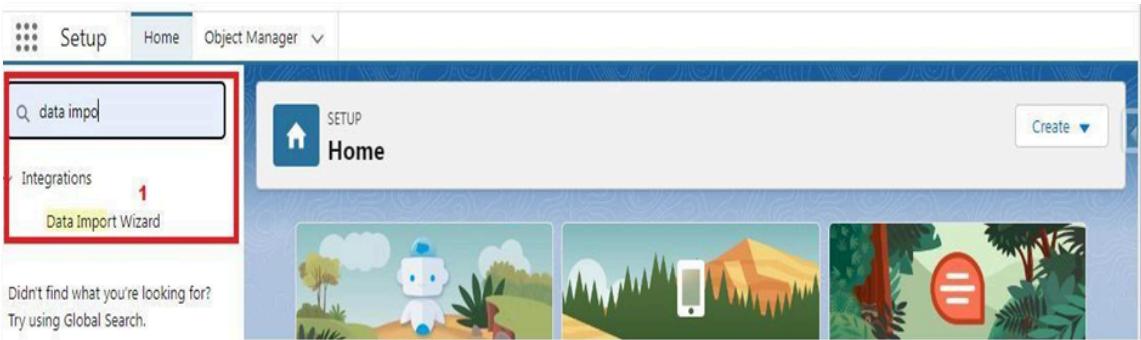
Data Import lets you upload data from external sources and combine it with data you collect via Analytics. You can then use Analytics to organize and analyze all of your data in ways that better reflect your business.

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

In order to complete this milestone, you need to create CSV files and give them data given in the picture below. After that from these CSV files we will import data for the Employee object.

## 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.

7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.

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.

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

9. Click OK on the popup.

10. 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	Retry Count	State Message	Status
<a href="#">View Request</a>	<a href="#">View Result</a>	7515000000jeYH4	14/06/2023, 11:54 am	14/06/2023, 11:54 am	105	00	0	14	0	0	Completed	

**Make sure you have 0 records under the records failed column**

## 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.

## 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.

**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	<input type="text" value="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.

## 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 Task objects only.

### 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.

# 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

Q: roles

SETUP Roles

Understanding Roles

Sample Role Hierarchy

View other sample Role Hierarchies: Territory-based Sample

Executive Staff

CEO President CFO VP, Sales \* View & edit data, roll up forecasts, & generate reports for all users below it or of other Executive Staff

Western Sales Director Director of W. Sales \* View & edit data, roll up forecasts, & generate reports for all users below it or of other Western Sales Directors. Can't access data of users above or at same level

Eastern Sales Director Director of E. Sales

International Sales Director Director of Int'l Sales \* View & edit data, roll up forecasts, & generate reports for all users below it or of other International Sales Directors. Can't access data of users above or at same level

International Sales Rep Asian Sales Rep European Sales Rep

CA Sales Rep OR Sales Rep NY Sales Rep MA Sales Rep

Set Up Roles

Don't show this page again

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.

Role Edit

New Role

Role Edit

Label

Role Name

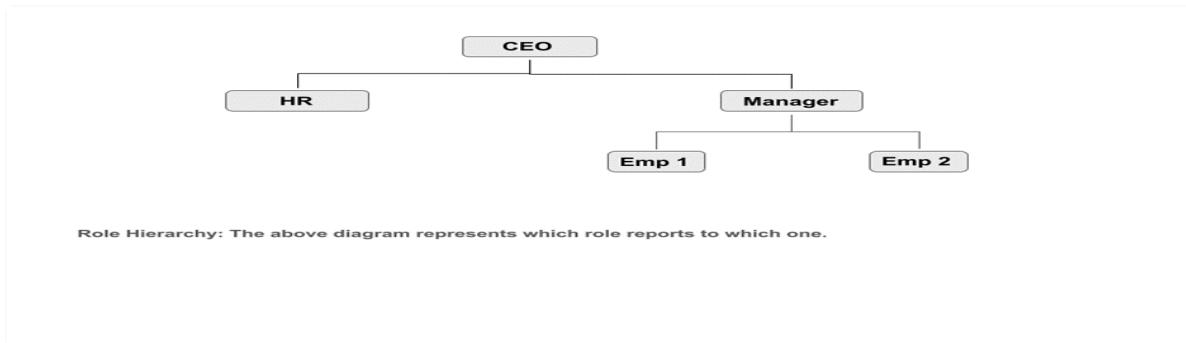
This role reports to

Role Name as displayed on reports

CEO

Save Save & New Cancel

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



## Activity 2: Creating more roles

- 1.Create three more roles for Manager, On Site Employee, Remote Employee.
- 2.Note: On Site Employee and Remote Employee reports to Manager.

## 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)

## Activity 1: 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

The screenshot shows the 'New User' setup page in Salesforce. The 'General Information' section contains the following data:  
First Name: Niklaus  
Last Name: Mikaelson  
Alias: nmika  
Email: nlarkin@MNwhite.com  
Username: nlarkin@MNwhite.com  
Nickname: Niklaus  
Role: HR  
User License: Salesforce  
Profile: HR  
The 'Active' checkbox is checked.  
At the bottom, there are several optional settings:  
Marketing User: Unchecked  
Offline User: Unchecked  
Knowledge User: Unchecked  
Flow User: Unchecked  
Service Cloud User: Unchecked  
Site.com Contributor User: Unchecked  
Site.com Publisher User: Unchecked  
WDC User: Unchecked  
Data.com User Type: None  
Data.com Monthly Addition Limit: Default Limit (300)  
Accessibility Mode (Classic Only): Unchecked  
High-Contrast Palette on Charts: Unchecked  
Load Lightning Pages While Scrolling: Checked  
Debug Mode: Unchecked

3. Save.

## Activity 2: 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.

## Activity 3: Creating more users

Create two more users as we created in activity 2.

## 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.

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

To Create a Page layout:

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

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

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

### Create New Page Layout

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

7. Click Save.
8. Make sure your page layout looks like the picture above.

## Activity 2 : Creating another page layout

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

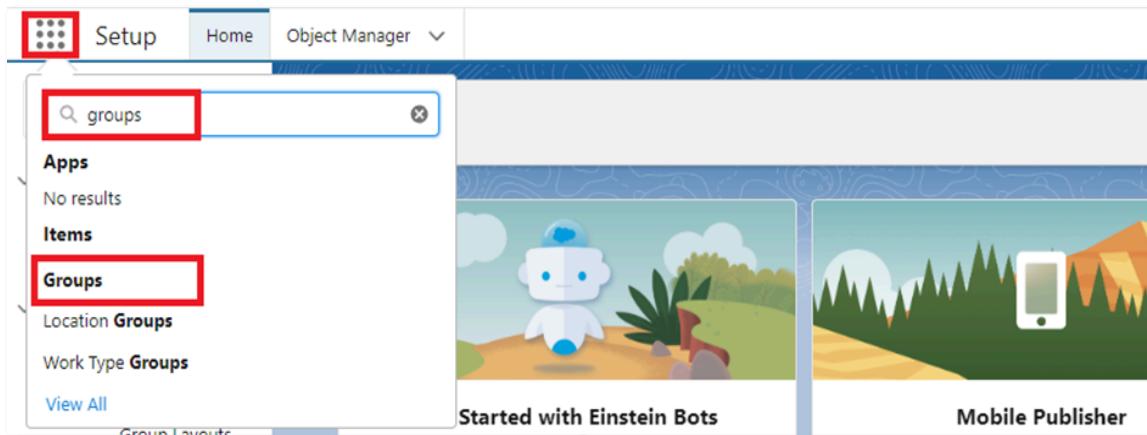
## Chatter Group

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

## Activity 1 : 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

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

Manage Members

Search People...

- Jason Mikaelson
- Elijah Mikaelson
- Kol Mikaelson
- Niklaus Mikaelson

+ Add

Done

- Click Done.

Salesforce Chatter Home Chatter People Groups Files

Internal Discussion Private with Customers

Chatter Engagement

Post Poll Question Share an update... Share

Sort by: Most Recent Activity

Search this feed...

Group Details

Description: This is created on the request of COO of the organization, for teams and users to have an internal discussion among them and have a clear idea about the on going activities.

Show More Information

Group Email: OF95:000000UZGpCAO@post.Si-diwaear.ap26.chatter.salesforce.com

Owner: Employee Project

Manage Members

- This is how your group interface looks like.
- 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.

## 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.

### Activity 1: 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. At the top, there's a navigation bar with 'Setup' and 'Object Manager' selected. A search bar is present above the main list. The main area displays a table for the 'Employee' object, with columns for Label, API Name, Type, Description, Last Modified, and Deployed. One row is visible, showing 'Employee' as the Label, 'Employee\_c' as the API Name, and 'Custom Object' as the Type. The 'Last Modified' field shows '01/06/2023'. The 'Deployed' field has a checkmark. On the far right of the table, there are 'Edit' and 'Delete' buttons, both of which are highlighted with red boxes. The entire screenshot is framed by a blue border.

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

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

New Record Type  
**Employee**

**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	--Master--
Record Type Label	On Site Employee
Record Type Name	On_Site_Employee
Description	
Active	<input checked="" type="checkbox"/>

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	Make Available	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”.

SETUP > OBJECT MANAGER  
**Employee**

**Record Types**  
0 items. Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
No items to display.			

**New** Page Layout Assignment

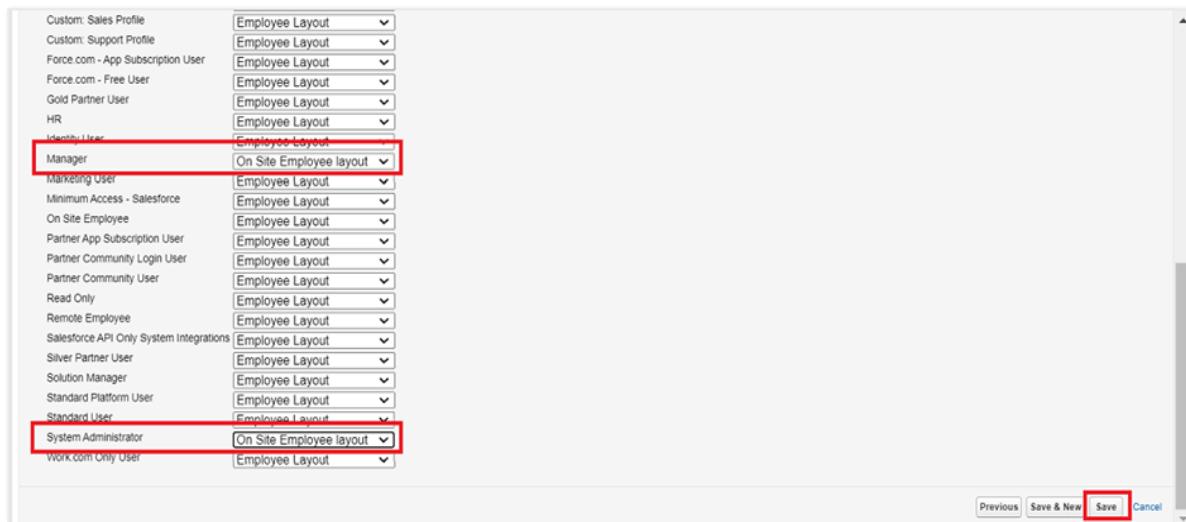
Profile Name	Record Types Currently Available	Make Available	Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>
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 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.	
<input type="radio"/> Apply one layout to all profiles <input type="button" value="Select Page Layout"/> <input checked="" type="radio"/> Apply a different layout for each profile	
Profile:	Page Layout
Analytics Cloud Integration User	<input type="button" value="Employee Layout"/>
Analytics Cloud Security User	<input type="button" value="Employee Layout"/>



7. click Save.

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

Create another Record Type with name “Remote Employee” following the step from activity 1.

Note: use Remote Employee page layout for Remote Employee record type.

## Permission sets

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

## Activity 1: Creating a permission set

To Create a Permission Set:

1. Go to setup --> type “permission sets” in quick search --> select permission sets --> New.
2. Enter the label name as “Per to Emp”

The screenshot shows the Salesforce Setup interface. In the top left, there's a blue cloud icon, followed by 'Setup' and 'Home'. A search bar says 'Search Setup'. On the right, there are various icons. Below these, a sidebar has 'Users' expanded, with 'Permission Sets' highlighted by a red box. The main content area is titled 'Permission Sets' and contains a sub-section 'Permission Sets'. It says, 'On this page you can create, view, and manage permission sets.' Below this, it says, 'In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: iOS | Android'. There's a 'All Permission Sets' dropdown, 'Edit' and 'Delete' buttons, and a 'Create New View' link. A 'New' button is also highlighted with a red box. The main list shows several permission sets like 'Buyer', 'Buyer Manager', etc., each with a description and a 'License' column.

--> Save.

This screenshot shows a 'Permission Set Create' dialog box. At the top, it says 'Permission Set Create'. Below that, there's a 'Save' button and a 'Cancel' button. The main area is titled 'Enter permission set information'. It has three fields: 'Label' (containing 'Per to Emp'), 'API Name' (containing 'Per\_to\_Emp'), and 'Description' (empty). The 'Label' and 'API Name' fields are both highlighted with a red box.

### 3. Under Apps Select object settings.

This screenshot shows the 'Apps' section in the Salesforce Setup. On the left, there's a sidebar with 'Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform' and a 'Learn More' link. The main content area lists several sections: '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), and 'Custom Setting Definitions' (Permissions to access custom settings). The 'Object Settings' link is highlighted with a red box.

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

**SETUP** **Permission Sets**

**Permission Set**  
**Adding Employee**

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

Permission Set Overview > Object Settings Employees

**Employees** Edit

**Tab Settings**

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

7. Now click on the Manage Assignment.

Setup Home Object Manager

Q. permission

Users  
Permission Set Groups  
**Permission Sets**  
Custom Code  
Custom Permissions

... > SETUP > PERMISSION SET 'ADDING EMPLOYEE'  
**Adding Employee**

**Current Assignments**  Add Assignment

8. Click on Add Assignment.

Full Name	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty.00d5i00000ewzcbea5.165fc3ee2or@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
demo project	dproj	nadeem@smart.com		<input checked="" type="checkbox"/>	System Administrator
Elijah Mikaelson	emika	elijah@smart.com	On Site Employee	<input checked="" type="checkbox"/>	On Site Employee
Integration User	integ	integration@00d5i00000ewzcbea5.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
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.

## 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 reports tab
2. Click New Report.

The screenshot shows the Microsoft Dynamics 365 interface. At the top, there is a navigation bar with icons and links for Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports (which is highlighted with a red box), and Dashboards. Below the navigation bar is a search bar labeled "Search...". The main area is titled "Reports" and shows a "Recent" section with two items: "Employee's working on projects report" and "Assets assigned to Employees". On the left, there is a sidebar with categories: Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), and Folders. At the bottom right of the main area, there is a "New Report" button, which is 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 box. On the left, there is a sidebar with categories: Category (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, there is a search panel with a search bar containing "employee" and a list of report types. The list includes: Activities with Employees, Employees, Employees with Reports to, Employees with ProjectTasks and Projects, Employee History, Assets with Employee Name, and Projects with ProjectTasks and Employees. The "Employees" report type is selected and highlighted with a red box. On the right, there is a "Details" panel for the selected report type, showing the icon (Employees), name (Standard Report Type), and a "Start Report" button, which is also highlighted with a red box. Below the details panel, there are sections for "Created By You" (No Reports Yet) and "Created By Others" (No Reports Yet), and a "Objects Used in Report Type" section with an "Owner" field.

4. Customize your report

--> Add fields from left pane as shown below

The screenshot shows the 'Employee Management' application's report configuration interface. On the left, there's a sidebar with 'Fields' and 'Groups' sections. The main area is titled 'Employees' and contains a preview table with two rows of data. The columns in the preview are: Employee, Employee Name, Employee ID, Reports to, Login Time, Logout Time, and Mode of Work. The first row has values: Employee, Employee Name, Employee ID, Reports to, Login Time, Logout Time, and Mode of Work. The second row has values: Eng for Junction Test, Eng for Junction Test, Employee ID, Employee Name, 8:00 am, 9:00 pm, and LinkedIn Profile. At the top right of the preview area, there are buttons for 'Save & Run', 'Save', 'Close', and 'Run'. A red box highlights the 'Run' button.

5. Save or run it.

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

## Activity 2: 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”.

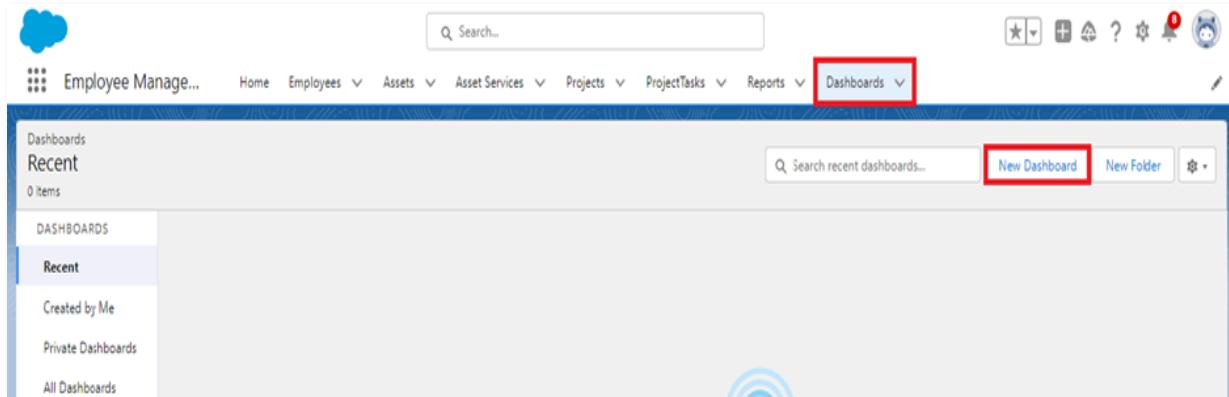
## Dashboards

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

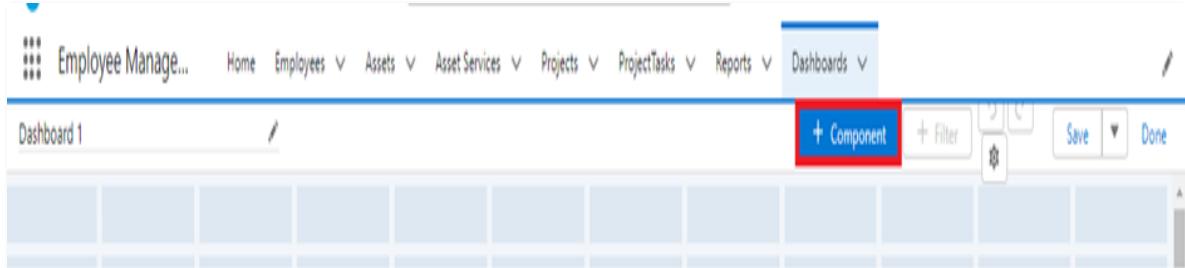
1. Go to the app --> click on the Dashboards tabs.



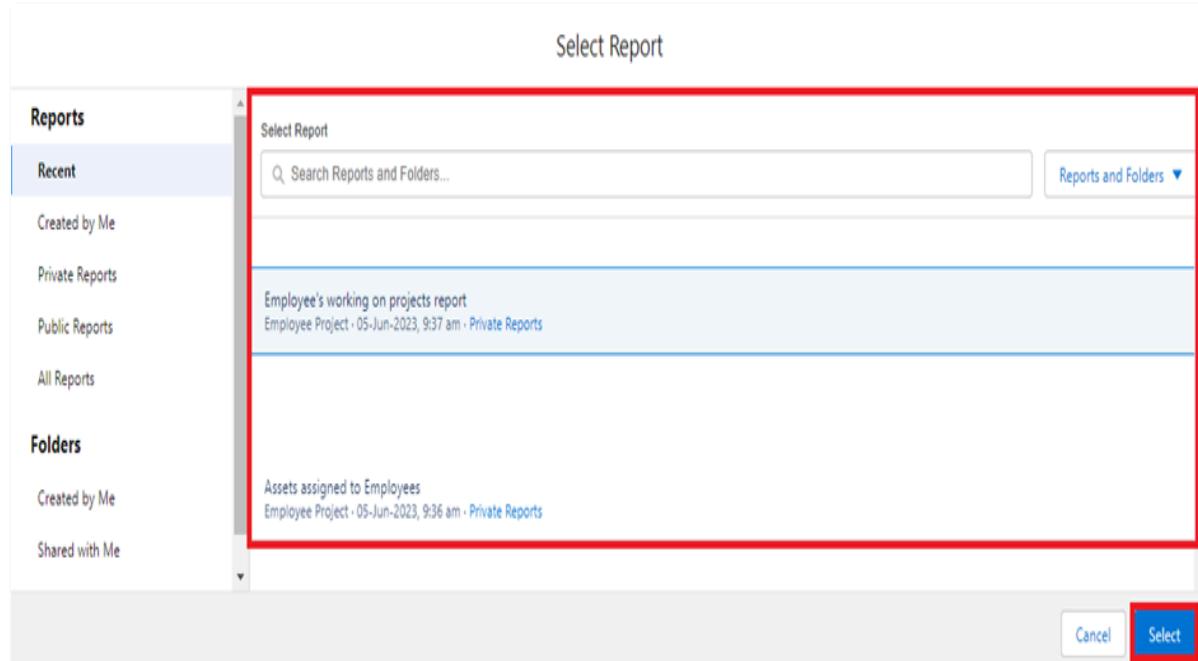
2. Give a Name and click on Create.

A screenshot of the 'New Dashboard' creation form. It has fields for 'Name' (containing 'Dashboard 1'), 'Description' (empty), 'Folder' (containing 'Private Dashboards'), and 'Select Folder' (button). At the bottom are 'Cancel' and 'Create' buttons, 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.

## Activity 2:

Create another Dashboard as we discussed in activity 1.