

Workforce Administration Solution

Description:

The **Workforce Administration Solution** is a comprehensive software platform tailored to optimize and automate employee management and asset assignment processes within an organization. It provides a centralized hub for tracking essential employee data, including their involvement in multiple projects, performance metrics, and asset allocations. By integrating various workforce management functions, the solution simplifies the administrative burden associated with employee supervision, project allocation, and resource management. This ensures that employees are effectively assigned tasks while monitoring their contributions to organizational goals.

In addition, the platform streamlines the process of asset assignment by keeping detailed records of the equipment and resources entrusted to employees. Whether it's tracking laptops, tools, or other assets critical to project success, the Workforce Administration Solution ensures accountability and efficient use of company resources. The real-time tracking capabilities further enable managers to allocate resources and personnel dynamically, adapting to the ever-changing demands of projects. With these functionalities, organizations can enhance productivity, improve employee performance, and achieve better alignment of resources with business objectives.

Key Features:

1. **Centralized Employee Data Management:**
 - Store and manage comprehensive employee profiles, including personal information, job roles, project assignments, and performance metrics in one centralized system.
2. **Project Tracking and Assignment:**
 - Track the number of projects each employee is working on and assign new projects based on availability and skills. Monitor progress and ensure optimal workforce distribution across projects.
3. **Asset Assignment and Tracking:**
 - Manage and monitor company assets, such as equipment, tools, and devices, assigned to employees. Keep detailed records of which assets

are allocated, returned, or in use, ensuring accountability.

4. Performance Monitoring:

- Track and assess employee performance in real-time, using KPIs such as project completion rate, work quality, and asset utilization. Use the data to identify top performers or areas for improvement.

5. Real-time Reporting and Analytics:

- Generate reports on workforce productivity, project timelines, and asset usage. Analyze trends and patterns to improve operational efficiency and resource management.

6. Automated Notifications and Alerts:

- Send automatic alerts for important updates, such as project deadlines, overdue asset returns, or changes in employee assignments. Helps prevent bottlenecks and ensures proactive management.

7. User-friendly Interface:

- A simple and intuitive interface for both administrators and employees, allowing easy access to key functionalities like asset request, project status, and assignment overviews.

8. Role-based Access Control:

- Ensure data security by granting different levels of access to various stakeholders based on their role in the organization. This keeps sensitive information restricted to authorized personnel.

9. Integration Capabilities:

- Seamlessly integrates with existing HR, finance, and project management systems, allowing smooth data flow across various business functions.

10. Mobile Access:

- Enable employees and managers to access the platform from any device, facilitating workforce management on the go and ensuring up-to-date information is always at hand.

Tasks:

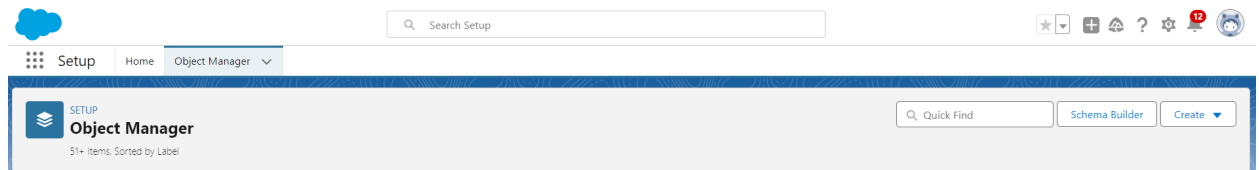
Task-1: Creating Objects

For this Workforce Administration Solution we need to create 5 objects i.e. Employee, Project, Project Task, Asset, Asset Service.

To create an object:

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

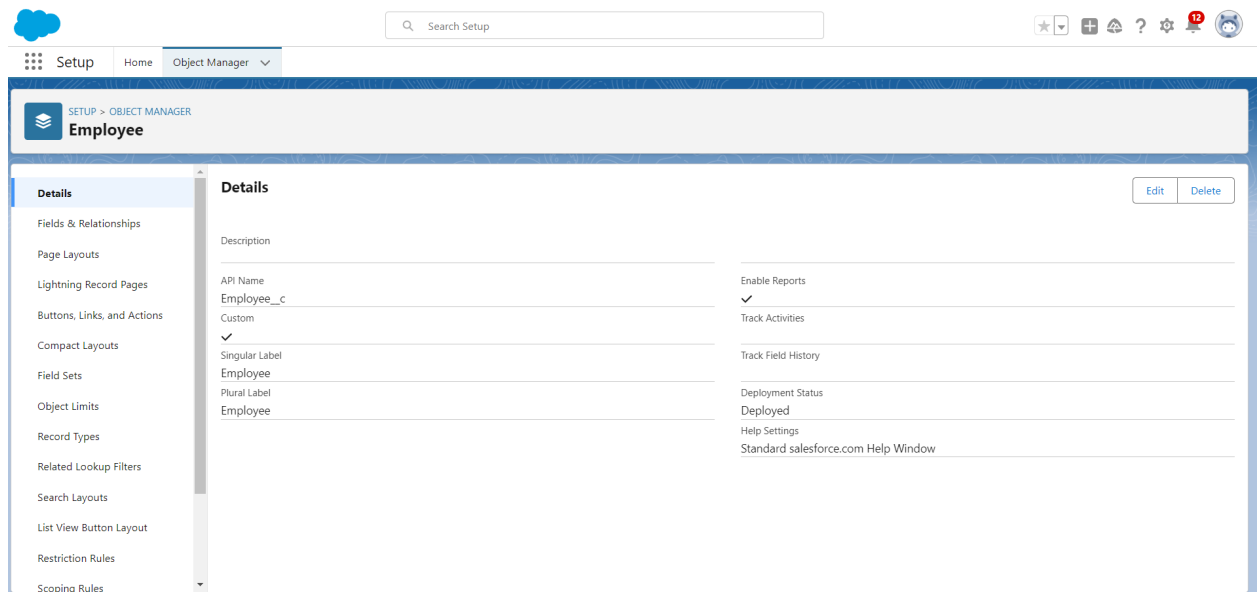
Custom Object



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

2. Click on Allow reports,

3. Allow search --> Save



After Successful creation of object Employee the page will appear like this and repeat the same steps for Project Object, Project Task Object, Asset Object and Asset Service Object.

Task-2: Creating Tabs

In this we are creating custom tabs for Employee object, Project, Project Task, Asset, Asset Service objects.

Custom Objects:

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.

To create a Tab:(Employee)

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



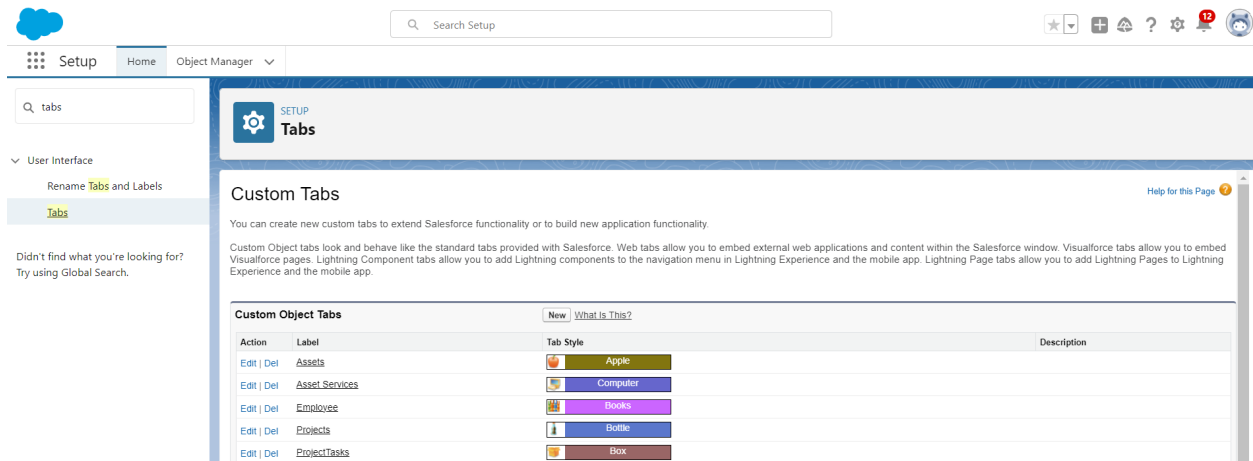
2. Select Object(Employee) --> Select any tab style --> Next (Add to profiles page) keep it as default --> Next (Add to Custom App) keep it as default --> Save.

To create Project Custom Tab:

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.

To Create Tabs for Remaining Objects:

Repeat the same process for remaining objects and after all successful creation of tabs then it will appear as like in the picture.



Task-3: Creating Lightning App

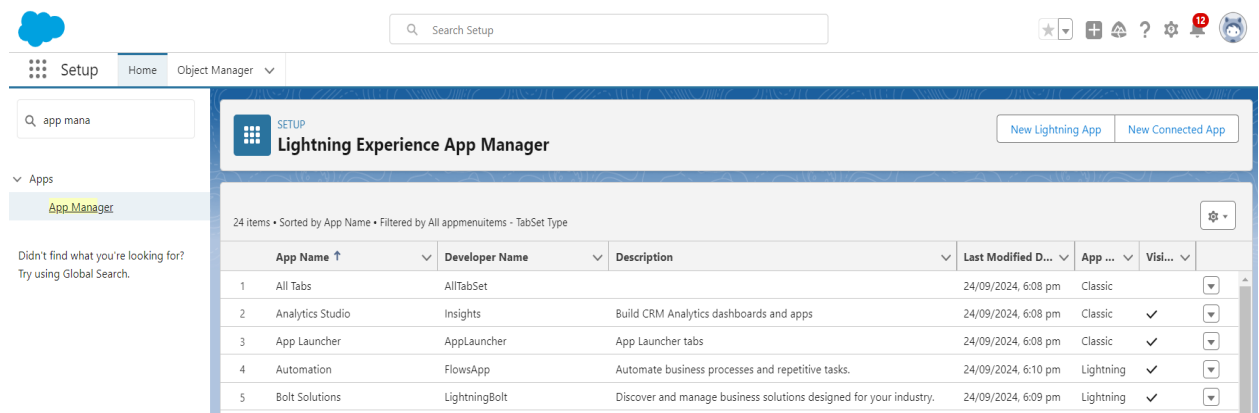
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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.

Creating a Lightning App:

To create a lightning app page:

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



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

App Name : Workforce Administrator Solution

Developer Name : this will auto populated

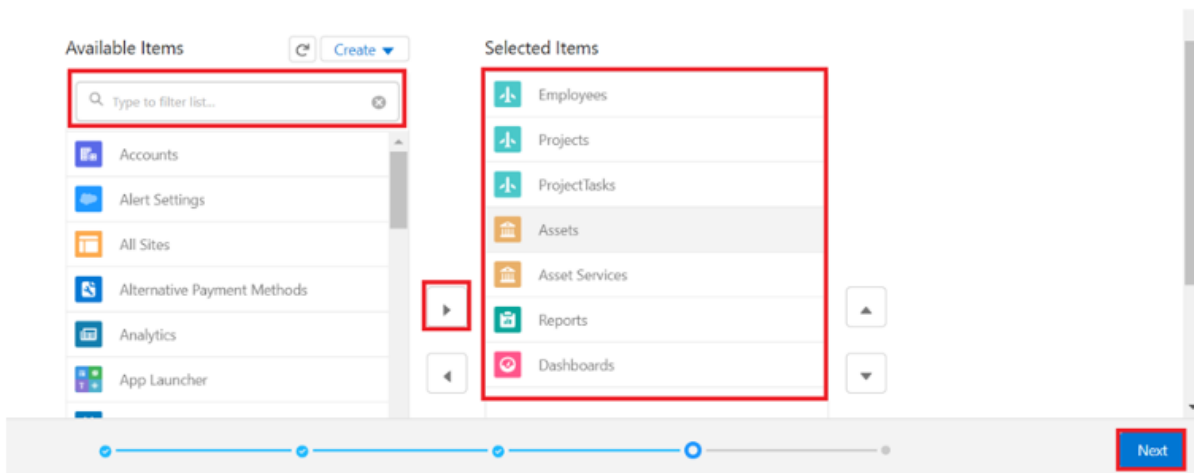
Description : Give a meaningful description

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

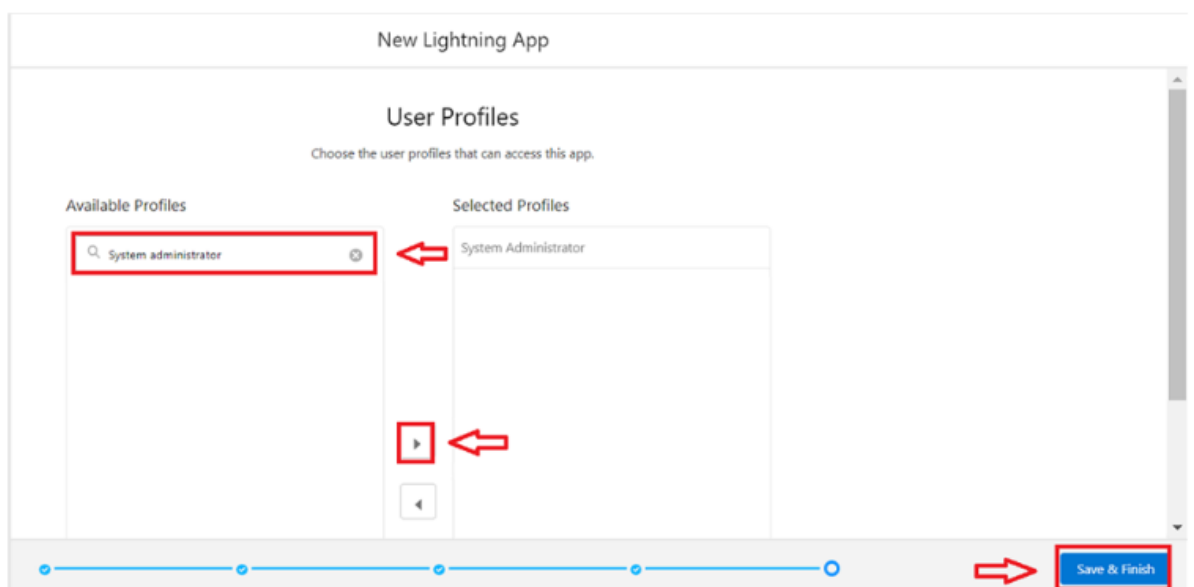
Primary color hex value : keep this default

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

4. To Add Navigation Items:



5. To Add User Profiles:

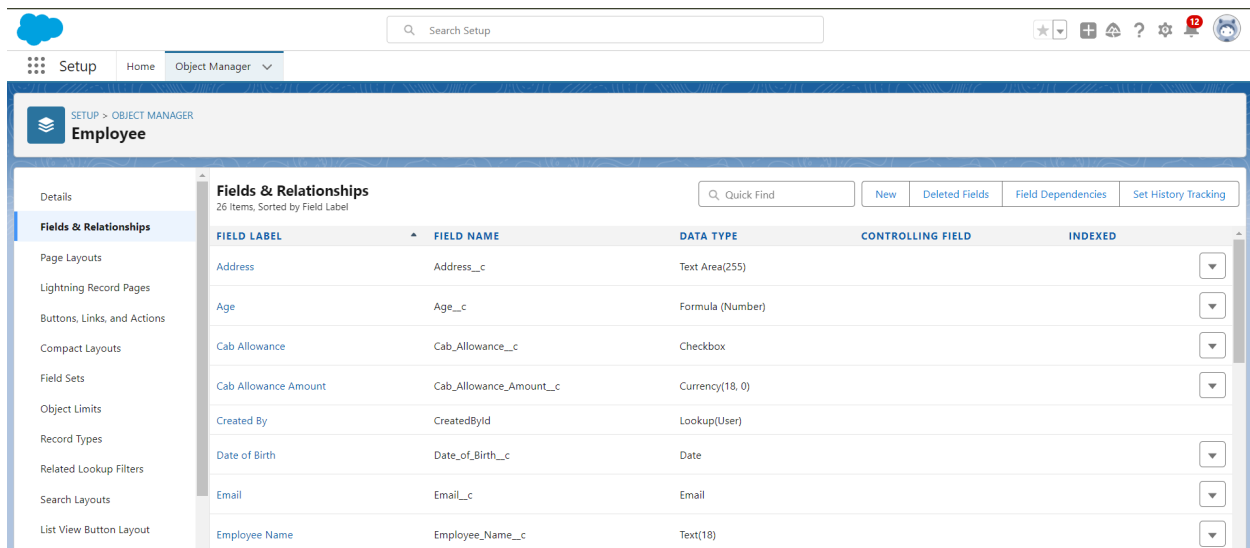


Task-4: Creating Fields and Relationships

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.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' dropdown is selected, showing 'Employee'. The left sidebar lists various setup options, with 'Fields & Relationships' highlighted. The main content area displays the 'Fields & Relationships' section for the 'Employee' object, showing 26 items sorted by Field Label. A table lists the following fields:

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

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.

| | |
|---------------------------------|--|
| <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.

Activity 3 : 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.
- Under Advanced Formula write down the formula and click "Check Syntax" and Next --> Next --> Save & Next

Step 3. Enter formula

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__c + 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

Quick Tip

- Getting Started
- Operators & Functions

Functions

-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

Activity 4 : Creating Picklist Field in Employee Object

- 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.

The screenshot shows a software configuration window titled "Step 2. Enter the details". It contains several input fields and checkboxes. The "Field Label" is set to "Gender". Under the "Values" section, the option "Enter values, with each value separated by a new line" is selected, and a text area below it contains "Male" and "Female" on separate lines. Other options like "Use global picklist value set", "Display values alphabetically", "Use first value as default value", and "Restrict picklist" are present but not selected. The "Field Name" is also "Gender". At the top right, there are "Previous", "Next", and "Cancel" buttons, with the "Next" button highlighted by a red rectangle.

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.
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

Create the below fields with the given data type in Employee Object

| Field Name | Data type |
|-----------------------|---|
| Qualification | Text |
| Address | Text Area |
| Experience | Text Area |
| Phone no | Phone |
| Email | Email |
| Joining date | Date |
| Mode of Work | Picklist: Values On Site Remote |
| Cab Allowance | Check box |
| Food Allowances | Check box |
| Wifi Allowances | Check box |
| Cab Allowance Amount | Currency |
| Food Allowance Amount | Currency |
| Wifi Allowance Amount | Currency |
| Login Time | Time |
| Logout Time | Time |
| LinkedIn Profile | url |

Now create the below fields in Project Object with the given data type same as done above

| Field Name | Data type |
|----------------|-----------------------------------|
| Project Name | Text |
| Project Lead | Text |
| Start Date | Date |
| End Date | Date |
| Project Status | Picklist: Values Completed |

| | |
|--|-----------------------------|
| | On Going Not Yet Started |
|--|-----------------------------|

Now create the below fields in Project Task Object with the given data type same as done above

| Field Name | Data type |
|---------------|---|
| Project Task | MDR with project object |
| Finishes in | Formula : (Project_Task__r.Start_Date__c - Project_Task__r.End_Date__c) Formula return type: Number |
| Working Hours | Numbers |
| Employee Name | Master Detail relationship with Employee object |

Now create the below fields in Asset Service Object with the given data type same as done above

| Field Name | Data type |
|------------|--|
| Asset Id | Lookup relationship with Asset object |
| Type | Picklist: Values Technical Issue Non Technical Issue |
| Technician | Text |
| Subject | Text Area |

| | |
|-------------|-----------|
| Description | Text Long |
|-------------|-----------|

Now create the below fields in Asset Object with the given data type same as done above

| Field Name | Data type |
|---------------|--|
| Asset Type | Picklist: Values Laptop Charger Mouse Monitor CPU |
| Model Name | Text |
| Employee Name | Lookup relationship with Employee Object |
| Date Of Issue | Formula Return type: date |

With this the creation of fields and relationships in the objects are done completely and successfully.

Task-5: Setting OWD

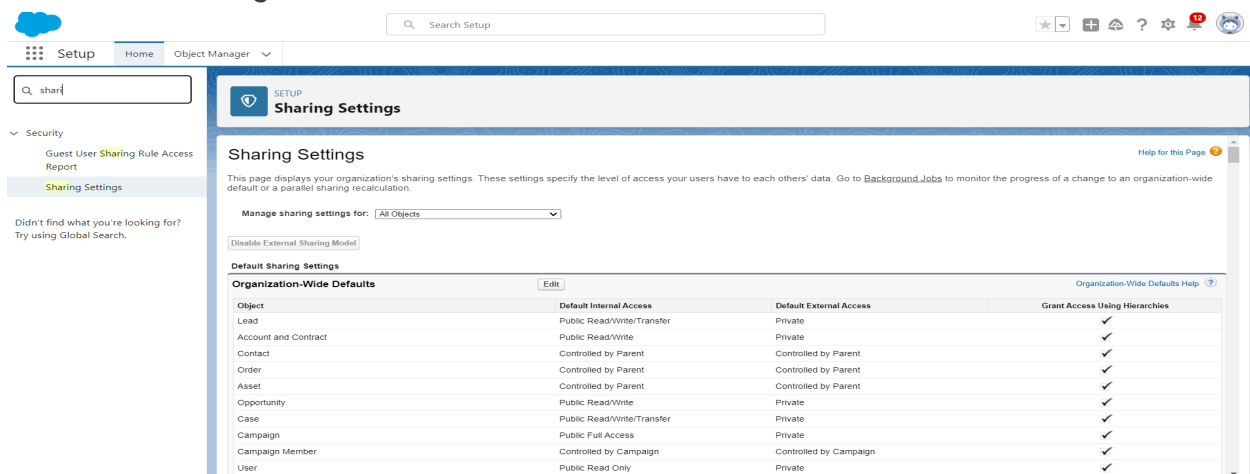
Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles, 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

Activity 1: Create OWD Setting

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



Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

[Disable External Sharing Model](#)

Default Sharing Settings

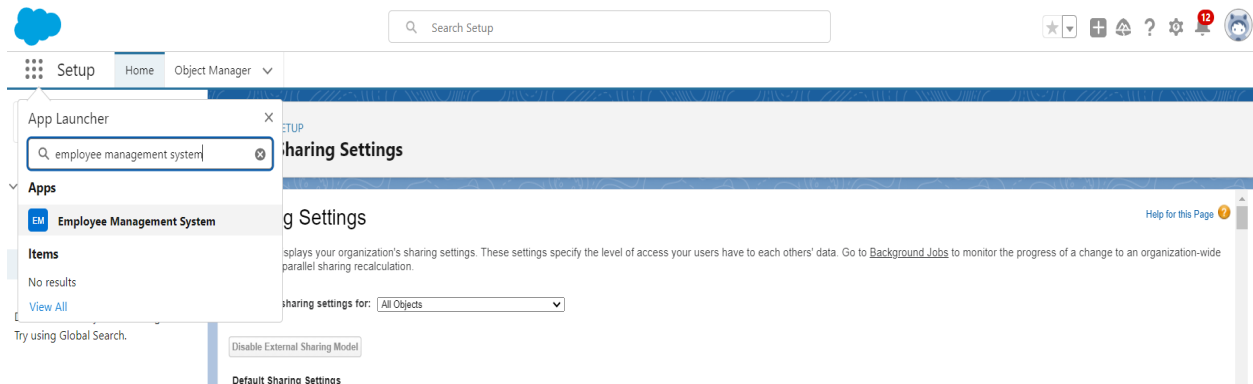
| Object | Default Internal Access | Default External Access | Grant Access Using Hierarchies |
|----------------------|----------------------------|-------------------------|-------------------------------------|
| Lead | Public Read/Write/Transfer | Private | <input checked="" type="checkbox"/> |
| Account and Contract | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Contact | Controlled by Parent | Controlled by Parent | <input checked="" type="checkbox"/> |
| Order | Controlled by Parent | Controlled by Parent | <input checked="" type="checkbox"/> |
| Asset | Controlled by Parent | Controlled by Parent | <input checked="" type="checkbox"/> |
| Opportunity | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Case | Public Read/Write/Transfer | Private | <input checked="" type="checkbox"/> |
| Campaign | Public Full Access | Private | <input checked="" type="checkbox"/> |
| Campaign Member | Controlled by Campaign | Controlled by Campaign | <input checked="" type="checkbox"/> |
| User | Public Read Only | Private | <input checked="" type="checkbox"/> |

And then Set OWD as Private for Project and Asset Service objects.

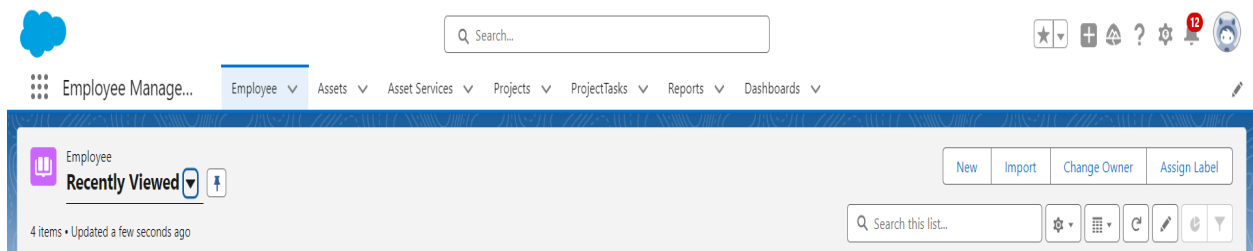
Task-6: User Adoption

Activity 1: Create a Record (Employee).

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



Search Employee Management System & click on it.
Click on the Employee tab.



Click New.

Fill the Details and click on Save.

Activity 2: View a Record (Employee)

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

Search Employee Management System & click on it.

Click on the Employee Tab.

Click on any record name. you can see the details of the Employee

Activity 3: Delete a Record (Employee)

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

Search Employee Management System & click on it.

Click on the Employee Tab.

Click on Arrow at right hand side on that Particular record.

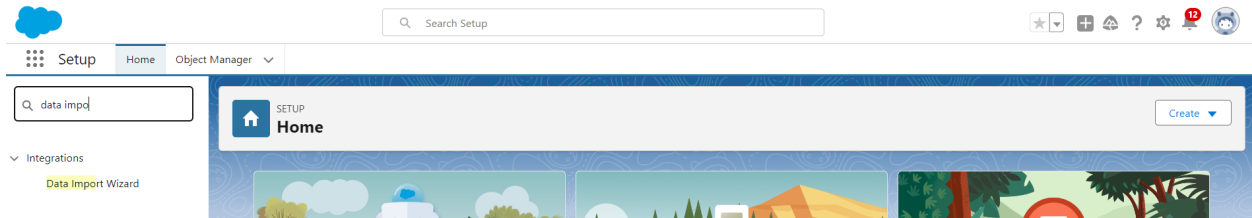
Click delete.

Task-7: Import Data

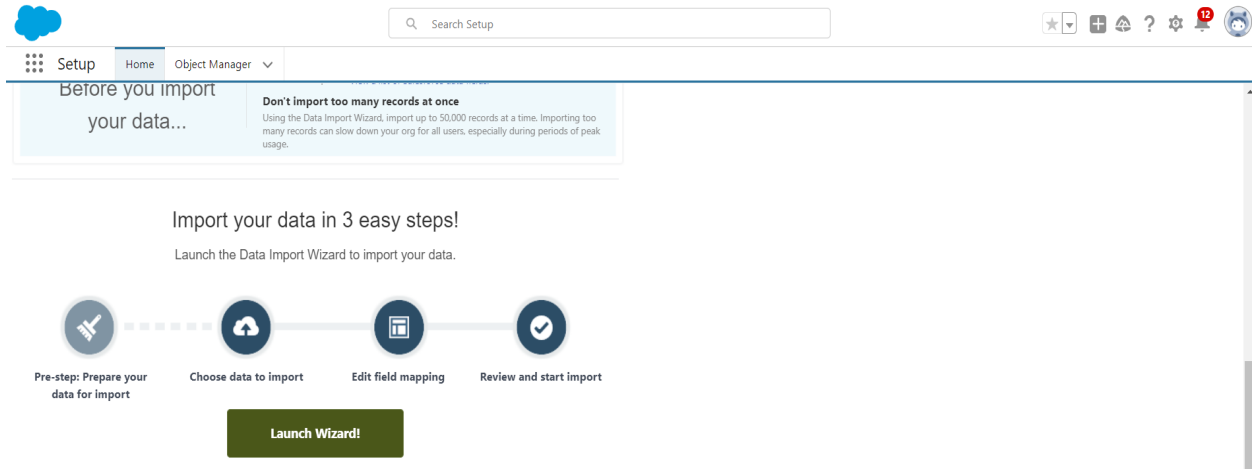
Activity-1: Importing data using Data Wizard

From Setup, click the Home tab.

In the Quick Find box, enter Data Import and select Data Import Wizard.



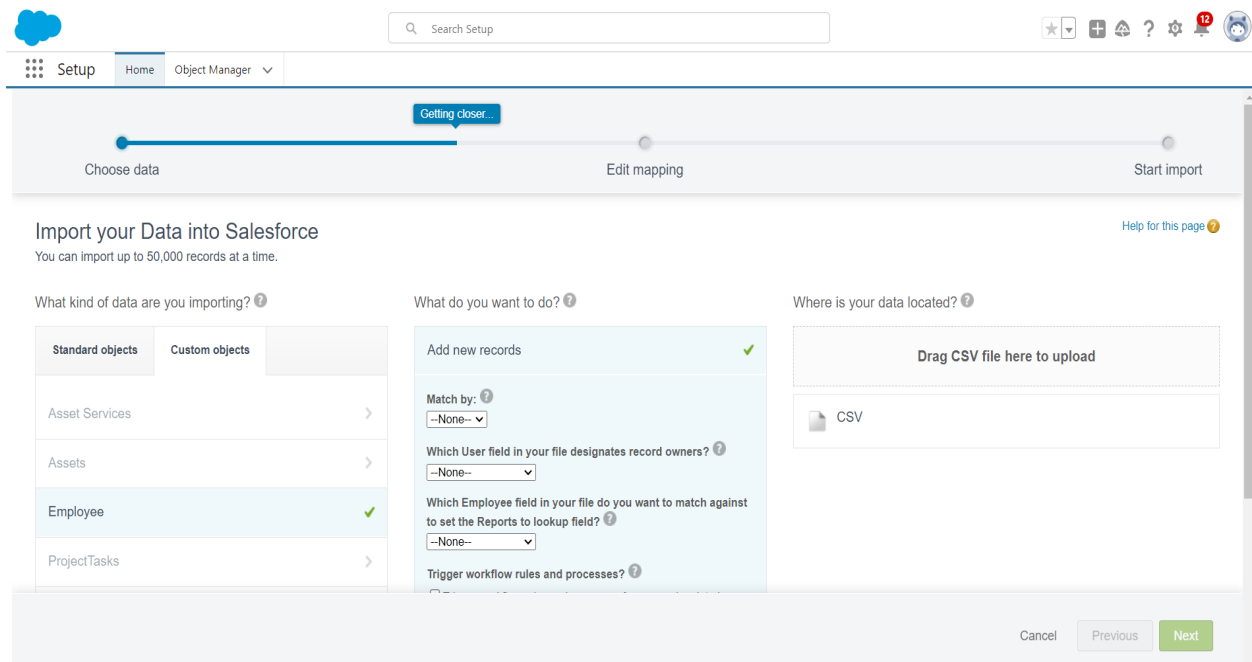
Click Launch Wizard!



Click the Custom Objects tab and select the Employee object.

Select Add new records.

Click CSV and choose file Employee_CSV which we made earlier. Click Next.



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

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

Click OK on the popup.

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

| 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 | |
| View Request | View Result | 751Qy000006G1Ub | 26/09/2024, 7:23 pm | 26/09/2024, 7:23 pm | 132 | 57 | 0 | 9 | 0 | 0 | | Completed | |

Task-8 : Creating 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 delete 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"/> |

2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Assets and Asset Services objects.

4. Scroll down and Click on Save.

Activity 2: Manager Profile

1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (Salesforce Platform User) --> enter profile name (Manager) --> Save.

2. While still on the profile page, then click Edit.

3. Scroll down to Custom Object Permissions and Give access permissions for Employee, Project and Project Task objects.

4. Scroll down and Click on Save.

Activity 3: Create Employee Profile

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

Task-9 : Creating Roles

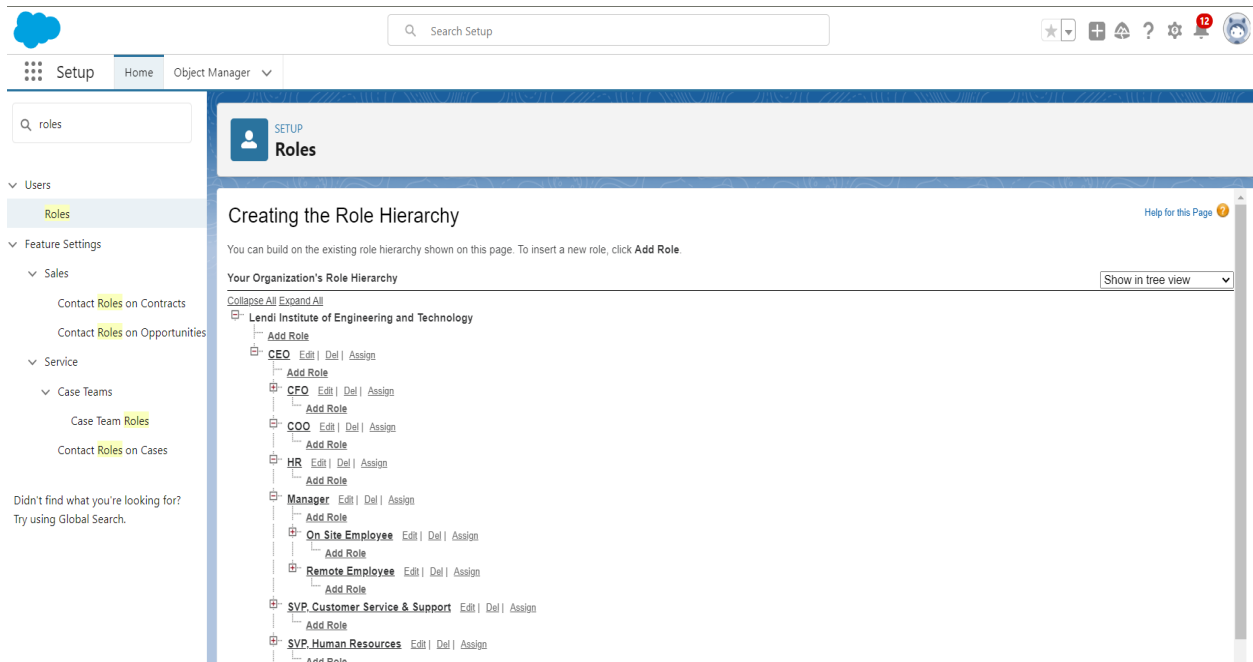
A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Activity 1: Creating HR Role

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

The screenshot displays the Salesforce Setup interface for the 'Roles' section. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Understanding Roles' and includes a 'Sample Role Hierarchy' diagram. The diagram illustrates a hierarchy starting with 'Executive Staff' (CEO, President, CFO, VP, Sales) at the top. Below this are three regional directors: 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Each director has associated sales representatives: 'Western Sales Rep' (CA, OR), 'Eastern Sales Rep' (NY, MA), and 'International Sales Rep' (Asian, European). To the right of the diagram, there are three columns of permissions, each corresponding to a level in the hierarchy. The top column for 'Executive Staff' lists permissions like 'View & edit data, roll up forecasts, & generate reports for all users below' and 'Can't access data of other Executive Staff'. The middle column for 'Regional Directors' lists 'View & edit data, roll up forecasts, & generate reports for all users directly below' and 'Can't access data of users above or at same level'. The bottom column for 'Sales Representatives' lists 'View & edit data, roll up forecasts, & generate reports only for own data' and 'Can't access data of users above or at same level'. At the bottom right, there is a 'Set Up Roles' button and a checkbox labeled 'Don't show this page again'.

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



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

Activity 2: Creating more roles

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

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

Task-10 : Creating Users

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

Activity 1: Create User

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

2. Fill in the fields

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

3. Save

The screenshot shows the 'New User' setup page in Salesforce. The 'General Information' section is highlighted with a red box, showing fields for First Name (Niklaus), Last Name (Mikaelson), Alias (nmika), Email (nlarkin@MNwhite.com), Username (nlarkin@MNwhite.com), and Nickname (Niklaus). The 'Role' dropdown is set to 'HR', 'User License' is 'Salesforce', and 'Profile' is 'HR'. The 'Save' button is also highlighted with a red box.

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.

Task-11 : Creating 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:

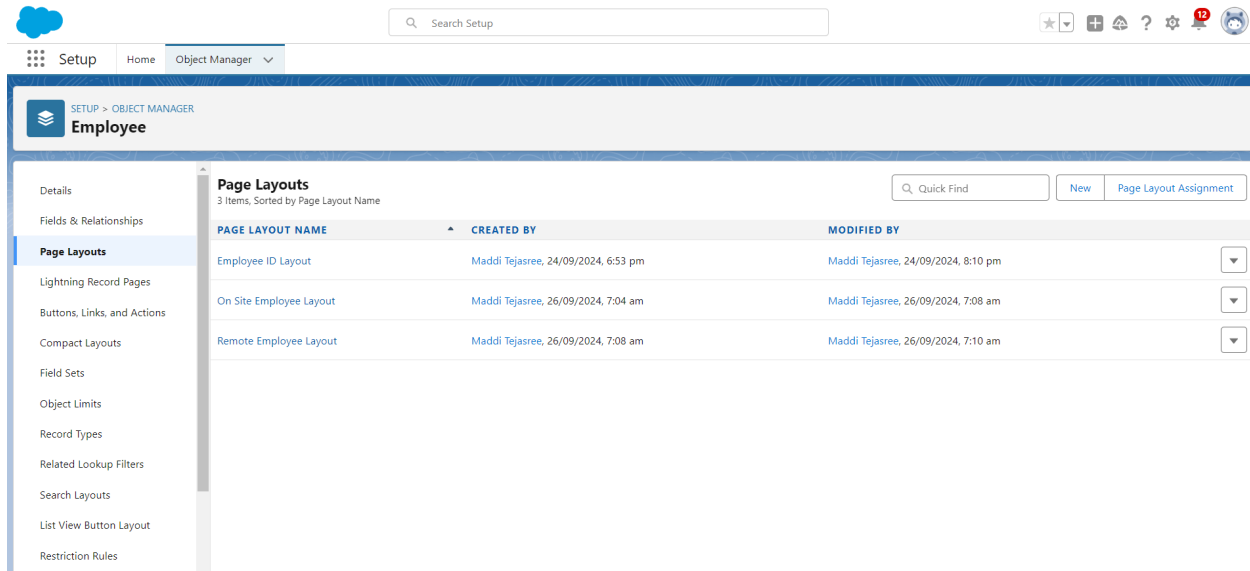
1. Go to Setup --> Click on Object Manager --> Search for the object (Employee) --> From drop down click on Edit.
2. Click on Page layout --> Click on New.
3. Give Page layout Name as "On Site Employee Layout" and click on Save.
4. Drag and drop the Section from the highlight panel below the Information 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.

The screenshot shows the Salesforce Page Layout Editor for the Employee object. The 'Fields' panel on the left lists various fields, with a 'Section' highlighted. The main area displays the layout with sections: Information, Personal Information, and Allowances. The Personal Information section contains fields for Date of Birth, Address, and Age. The Allowances section contains fields for Cab Allowance and Food Allowance.

| Section | Fields |
|----------------------|---|
| Information | Employee ID, Employee Name, Gender, Experience, Email, Joining date, LinkedIn Profile |
| Personal Information | Date of Birth, Address, Age |
| Allowances | Cab Allowance, Food Allowance |

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.



The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Page Layouts' and shows a table with 3 items. The table has columns for PAGE LAYOUT NAME, CREATED BY, and MODIFIED BY. The items listed are Employee ID Layout, On Site Employee Layout, and Remote Employee Layout. The Remote Employee Layout was created on 26/09/2024 at 7:08 am by Maddi Tejasree.

| PAGE LAYOUT NAME | CREATED BY | MODIFIED BY |
|-------------------------|-------------------------------------|-------------------------------------|
| Employee ID Layout | Maddi Tejasree, 24/09/2024, 6:53 pm | Maddi Tejasree, 24/09/2024, 8:10 pm |
| On Site Employee Layout | Maddi Tejasree, 26/09/2024, 7:04 am | Maddi Tejasree, 26/09/2024, 7:08 am |
| Remote Employee Layout | Maddi Tejasree, 26/09/2024, 7:08 am | Maddi Tejasree, 26/09/2024, 7:10 am |

On successful creation of all page layouts it will appear as above.

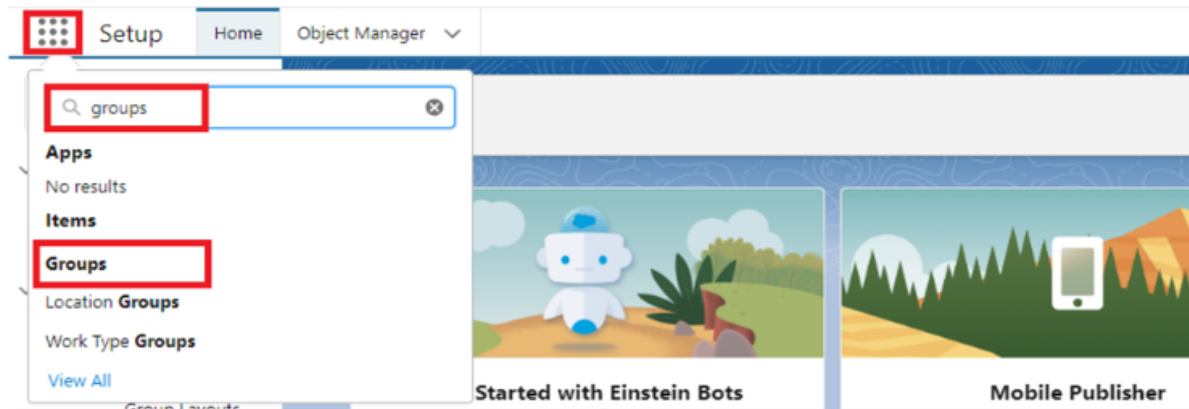
Task-12 : Creating Chatter Group

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.

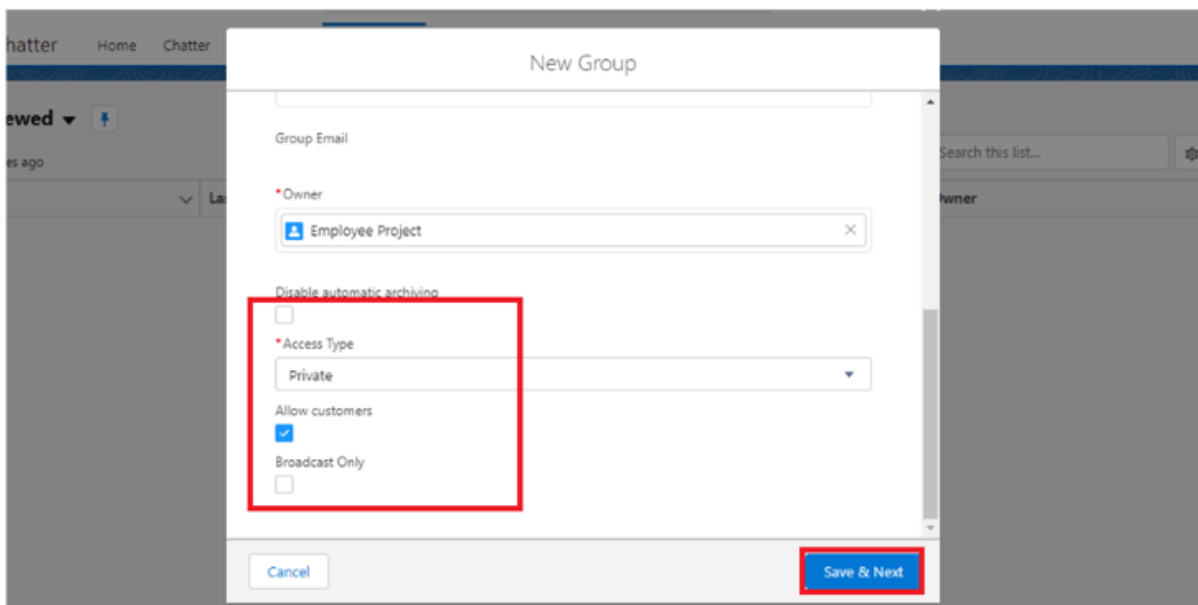
To Create a chatter group:

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



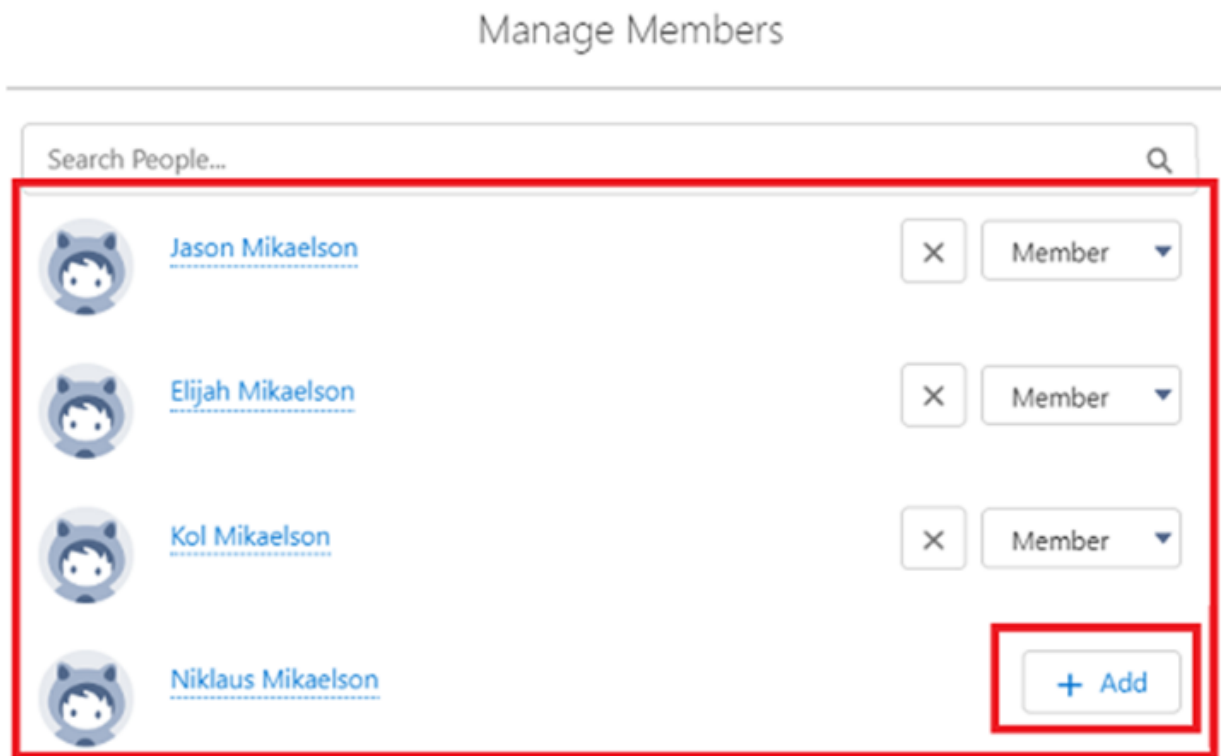
4. Fill in the new group information with these details:

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

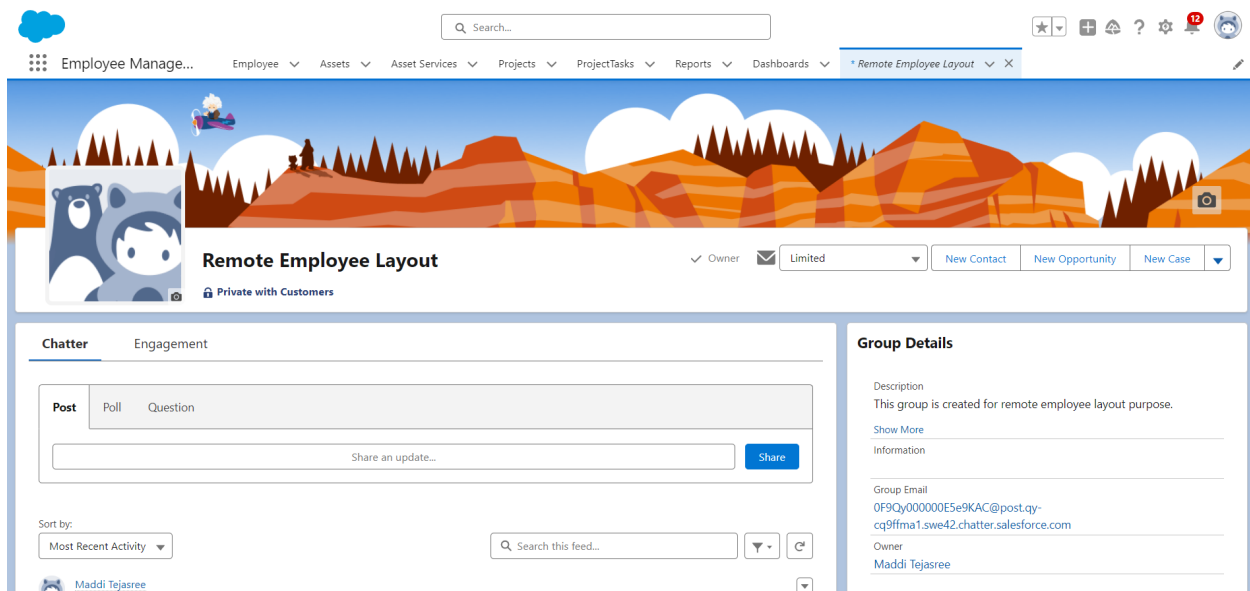


5. Click Save & Next. Skip the Upload Picture section and click Next.

- On the Manage Members screen, click Add next to users you created in the previous activity.



- Click Done.



This is how your group interface looks like

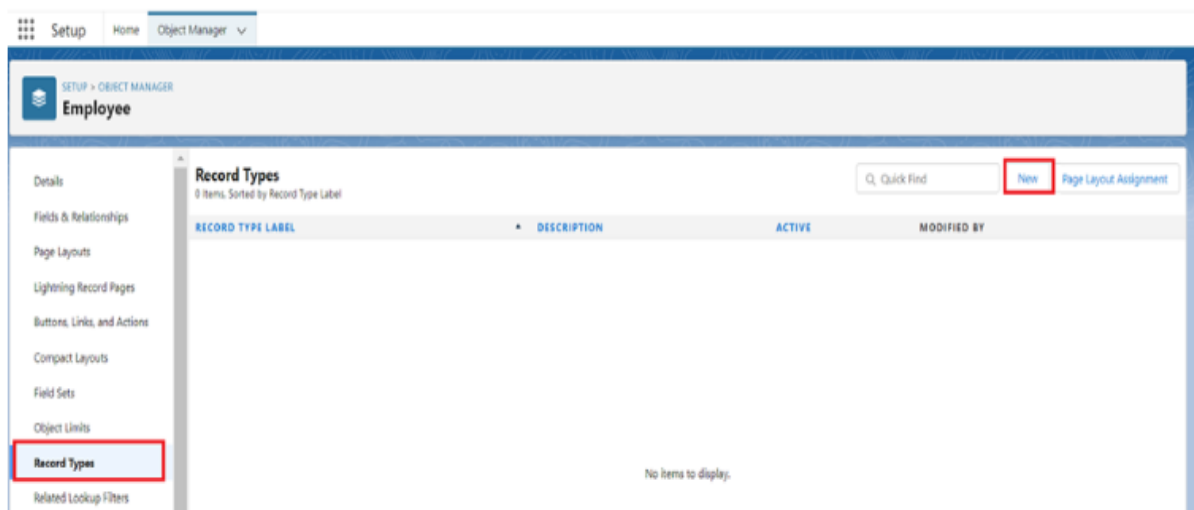
Task-13 : Creating Record Types

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



3. Give Record Type Label as "On Site Employee" and make it active.
4. Uncheck for "Make Available".
5. Scroll down and check for the Manager & System Administrator profile and click on Next.
6. Select "Apply a different layout for each profile", and change page layout to On Site Employee Layout for manager profile and System Administrator.
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.

Task-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.

Activity 1: Creating a permission set

To Create a Permission Set:

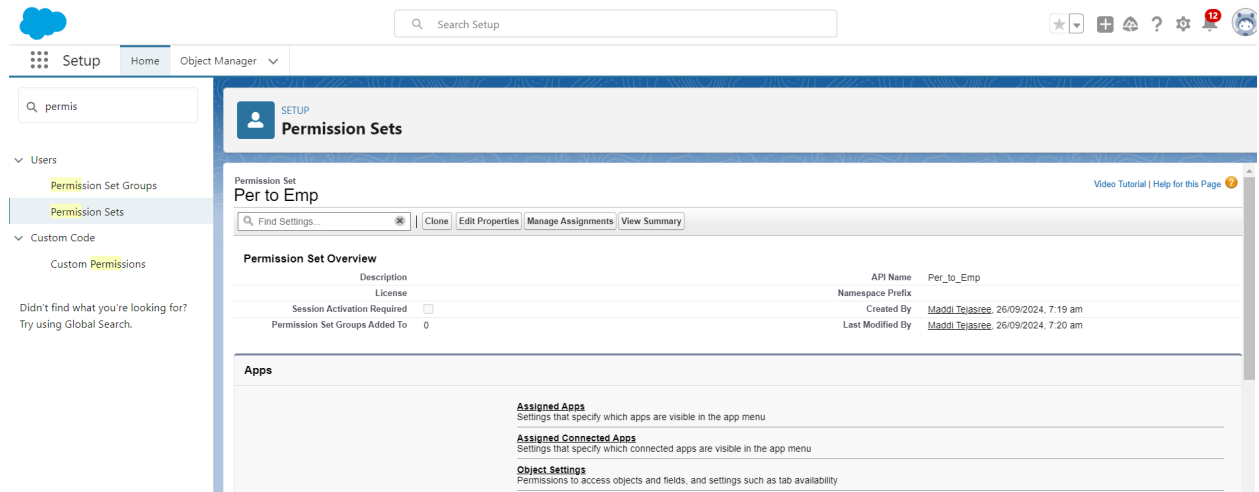
1. Go to setup --> type "permission sets" in quick search --> select permission sets --> New.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area is titled "Permission Sets" and includes a search bar, a "New" button, and a table of existing permission sets. The table has columns for Action, Permission Set Label, Description, and License. The table lists various permission sets such as Buyer, Buyer Manager, C360 High Scale Flow Integration User, CRM User, Commerce Admin, Contact Center Admin, Contact Center Admin (Partner Telephony), Contact Center Agent, Contact Center Agent (Partner Telephony), Contact Center Supervisor, Contact Center Supervisor (Partner Telephony), Data Cloud Home Org Integration User, DeliveryEstimationServicePermSet, and Experience Profile Manager.

| Action | Permission Set Label | Description | License |
|--------------------------------------|---|---|--|
| <input type="checkbox"/> Clone | Buyer | Allows access to the store. Lets users see products and categories, ... | B2B Buyer Permission Set One Seat |
| <input type="checkbox"/> Clone | Buyer Manager | Includes all Buyer capabilities, and allows access to manage carts an... | B2B Buyer Manager Permission Set One Seat |
| <input type="checkbox"/> Clone | C360 High Scale Flow Integration User | Allows integration user to access features specific to C360 High Scal... | Cloud Integration User |
| <input type="checkbox"/> Clone | CRM User | Denotes that the user is a Sales Cloud or Service Cloud user. | CRM User |
| <input type="checkbox"/> Clone | Commerce Admin | Allow access to commerce admin features | Commerce Admin Permission Set License Seat |
| <input type="checkbox"/> Clone | Contact Center Admin | Manage Service Cloud Voice contact centers that use Amazon Conne... | Service Cloud Voice User |
| <input type="checkbox"/> Clone | Contact Center Admin (Partner Telephony) | Manage Service Cloud Voice contact centers that use your preferred t... | Service Cloud Voice User (Partner Telephony) |
| <input type="checkbox"/> Clone | Contact Center Agent | Access agent features in Service Cloud Voice contact centers that us... | Service Cloud Voice User |
| <input type="checkbox"/> Clone | Contact Center Agent (Partner Telephony) | Access agent features in Service Cloud Voice contact centers that us... | Service Cloud Voice User (Partner Telephony) |
| <input type="checkbox"/> Clone | Contact Center Supervisor | Access supervisor features in Service Cloud Voice contact centers th... | Service Cloud Voice User |
| <input type="checkbox"/> Clone | Contact Center Supervisor (Partner Telephony) | Access supervisor features in Service Cloud Voice contact centers th... | Service Cloud Voice User (Partner Telephony) |
| <input type="checkbox"/> Clone | Data Cloud Home Org Integration User | Allows integration user to access entities specific to Remote Data Clo... | Cloud Integration User |
| <input type="checkbox"/> Clone | DeliveryEstimationServicePermSet | | Cloud Integration User |
| <input type="checkbox"/> Del Clone | Experience Profile Manager | | Salesforce |

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

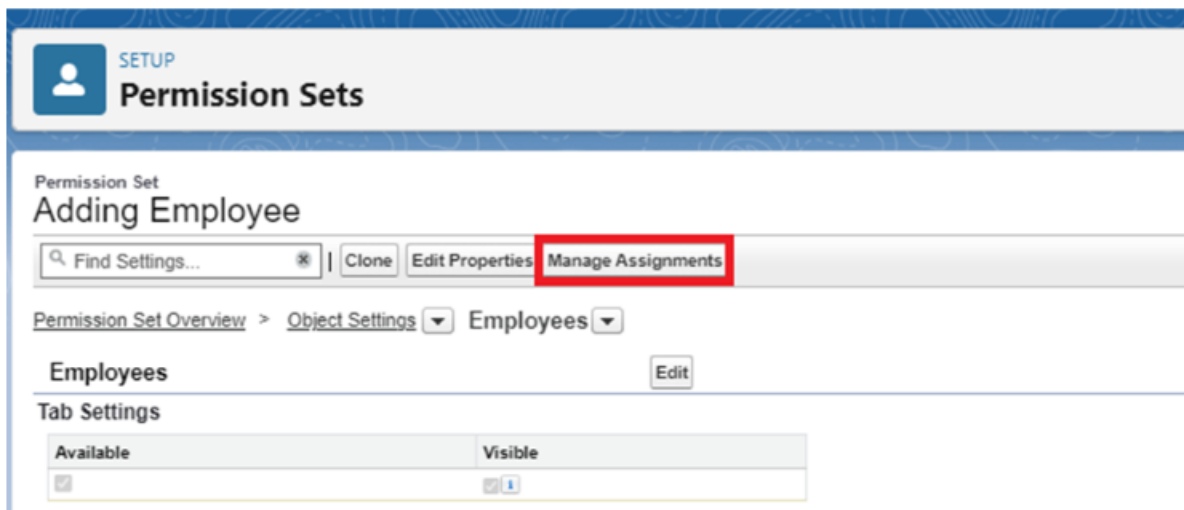
3. Under Apps Select object settings.



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

5. Click on Save.

6. After saving the permission click on the Manage assignment



7. Now click on the Manage Assignment.

8. Click on Add Assignment.

9. Now select the users(any one user with the profile “On Site Employee”) and click on Next.

10. Click on Assign
11. Click on Done.

Task-15 : Creating 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.

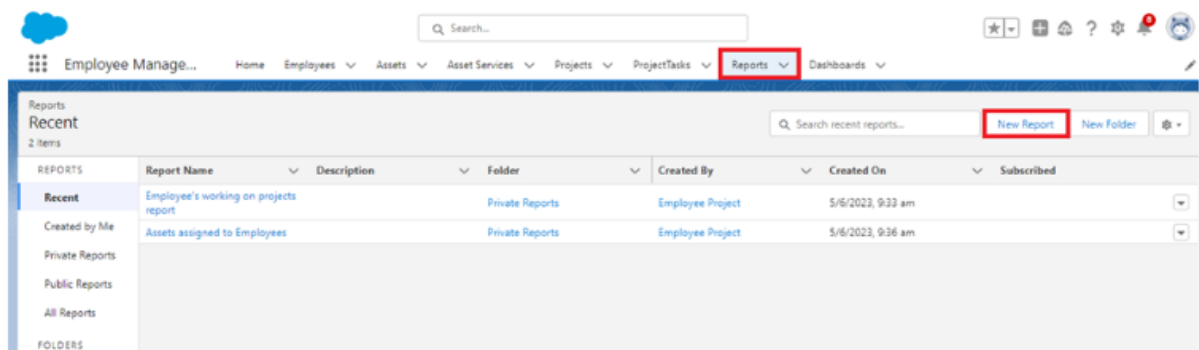
Types of Reports in Salesforce

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

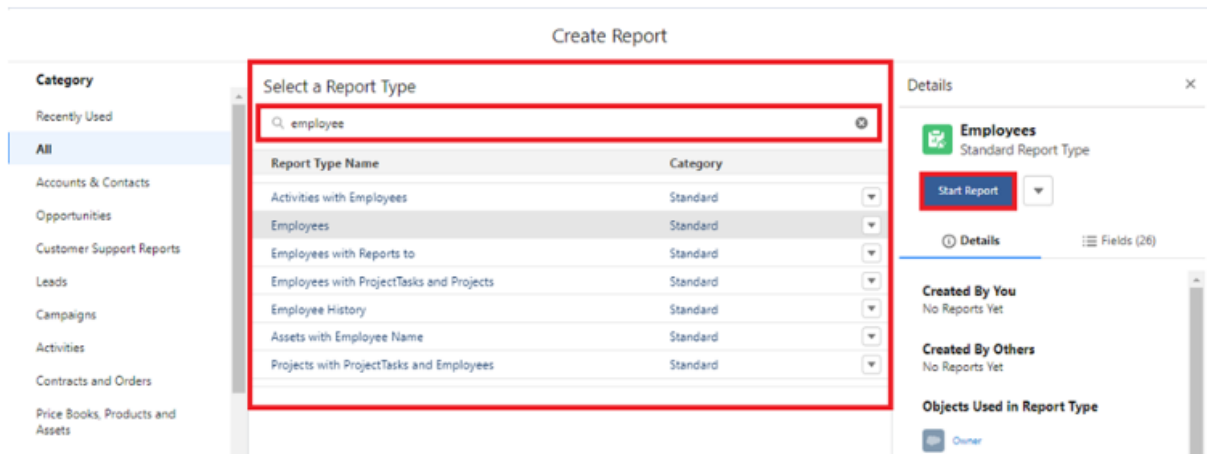
Activity 1: Create Report

To Create a Report:

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

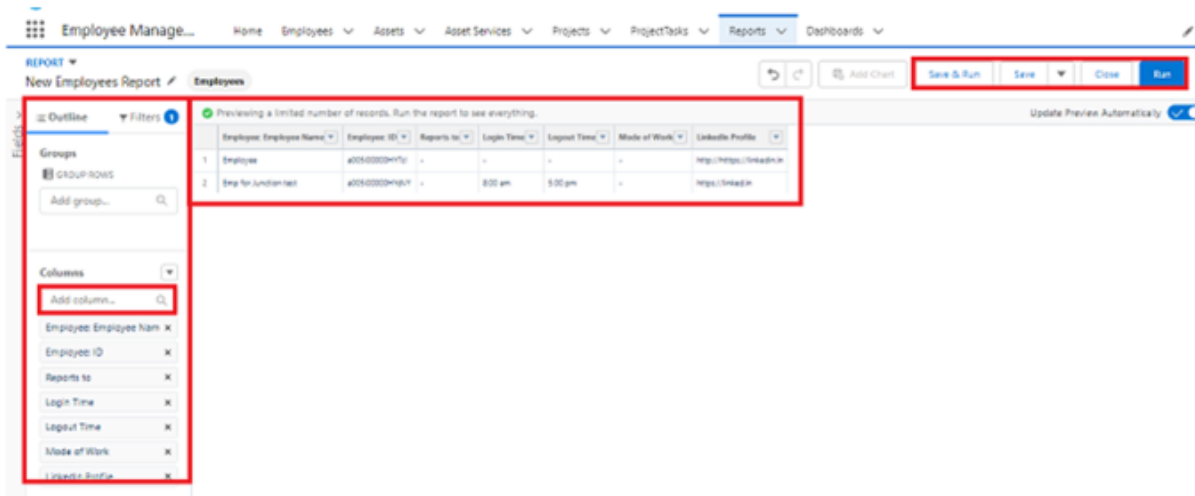


3. Select report type from category or from report type panel or from search panel --> click on start report.



4. Customize your report

--> Add fields from left pane as shown below



5. Save or run it.

Activity 2: Create 2 more Reports

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

Task-16 : Creating Dashboards

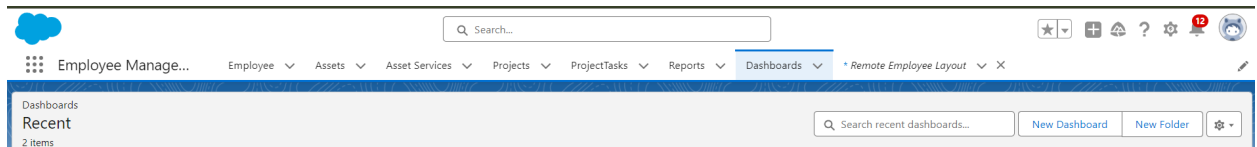
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of

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.

New Dashboard

* Name

Description

Folder

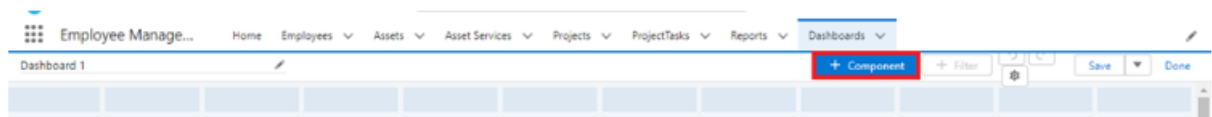
Private Dashboards

Select Folder

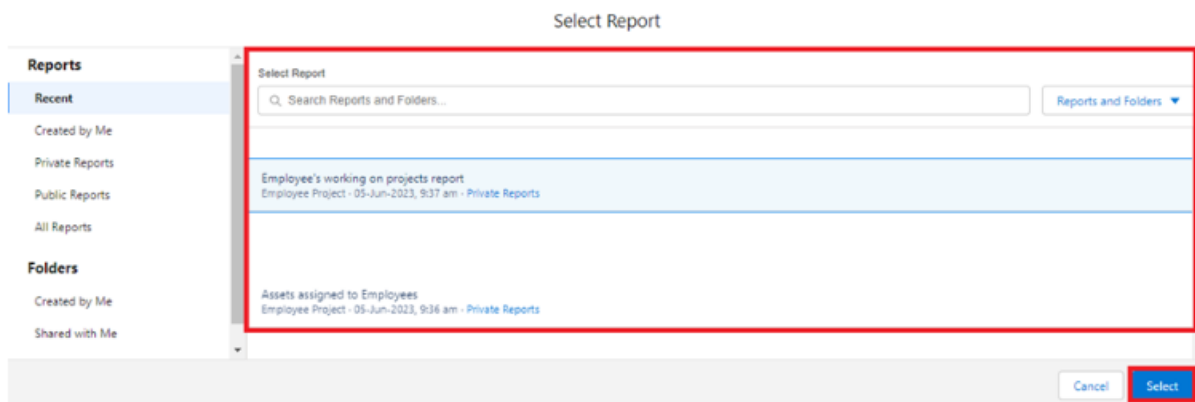
Cancel

Create

3. Select add component.



4. Select a Report and click on select.



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

Activity 2:

Create another Dashboard as we discussed in activity 1.

Conclusion

In conclusion, the **Workforce Administration Solution** is a transformative Salesforce-based platform designed to streamline employee management and asset assignment processes within organizations. By centralizing crucial workforce and asset data, automating project assignments, and providing real-time insights into performance, this solution enhances operational efficiency, optimizes resource utilization, and fosters accountability. Its user-friendly interface, integration capabilities, and mobile access make it a versatile tool that can adapt to the evolving needs of businesses. Ultimately, the platform empowers organizations to better manage their workforce, improve project outcomes, and maintain tighter control over their assets, driving greater productivity and long-term success.