WORKFORCE ADMINISTRATION SOLUTION

Workforce Empowerment Hub

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Abstract

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

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

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

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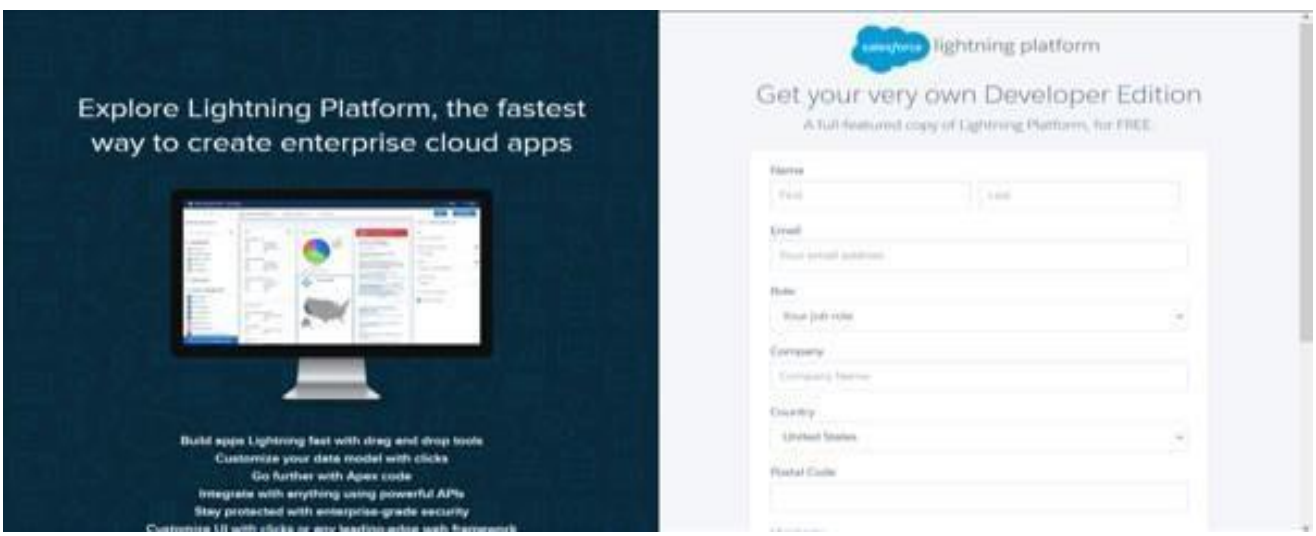
1. Creating a Developer Account in Salesforce

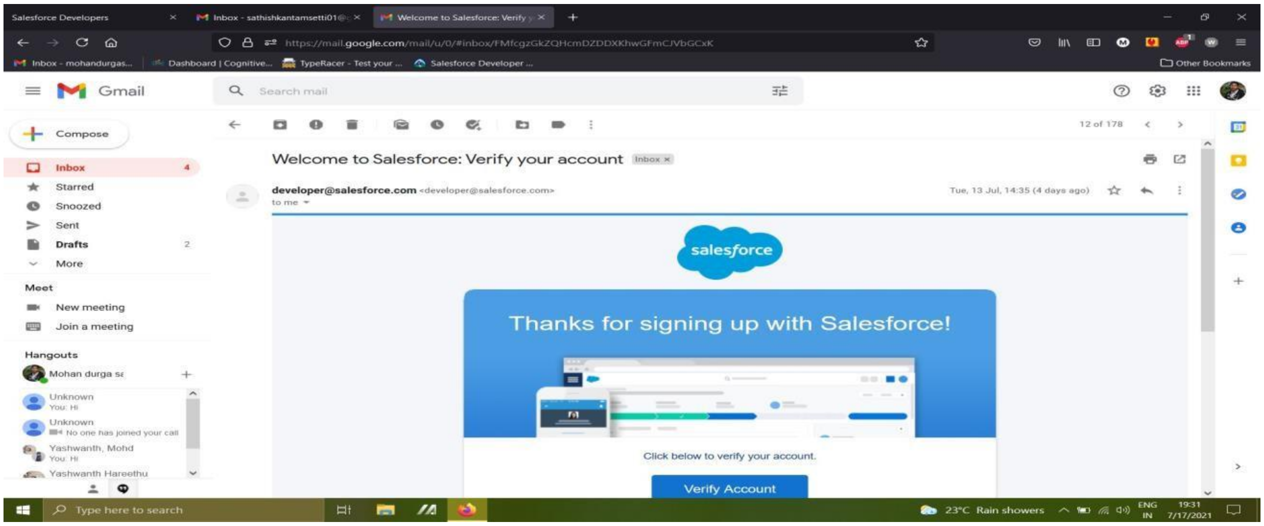
Step 1: Sign Up for a Developer Org

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



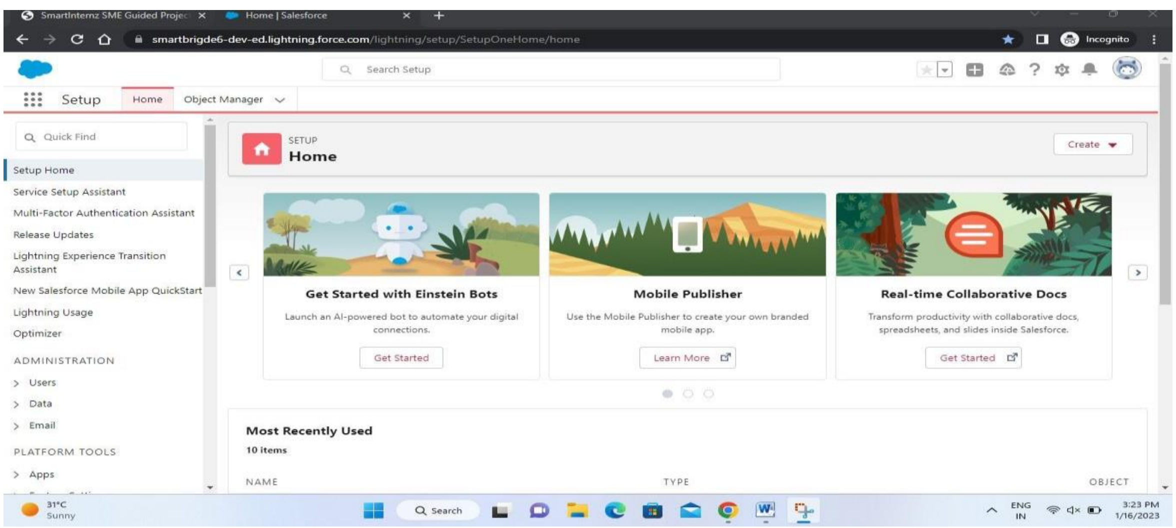
Step 2: Account Activation

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



Step 3: Login to Your Salesforce Account

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



2. Salesforce Objects

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

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

2.1. Creating Employee custom object

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

Step 1: Access Setup

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

Step 2: Open Object Manager

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

Step 3: Create a Custom Object

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

Step 4: Create "Employee" Object

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

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

Step 5: Create a Custom Tab for "Employee"

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

2.2. Creating the Project Object

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

Step 1: Access Setup

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

Step 2: Open Object Manager

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

Step 3: Create a Custom Object

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

Step 4: Create "Project" Object

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

Step 5: Create a Custom Tab for "Project"

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

2.3. Creating the Project Task Object

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

Step 1: Access Setup

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

Step 2: Open Object Manager

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

Step 3: Create a Custom Object

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

Step 4: Create "Project Task" Object

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

- **Plural Label**: Project Tasks
- **Record Name**: Project Task

2. **Check the following boxes**:
   - **Allow Reports**
   - **Allow Search**
3. **Click "Save"** to create the object.

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

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

2.4. Creating the Asset Object

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

Step 1: Access Setup

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

Step 2: Open Object Manager

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

Step 3: Create a Custom Object

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

Step 4: Create "Project Task" Object

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

Step 5: Create a Custom Tab for "Asset"

6. **Click the "Home" tab** and enter "Tabs" in the Quick Find search bar.
7. **Select "Tabs"** from the search results.
8. Under **Custom Object Tabs**, click **New**.
9. For **Object**, select **Asset**.
10. For **Tab Style**, select any icon that represents your object.

2.5. Creating the “Asset Service” Object

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

Step 1: Access Setup

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

Step 2: Open Object Manager

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

Step 3: Create a Custom Object

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

Step 4: Create "Asset" Object

7. On the **Custom Object Definition** page, enter the following details:
   - **Label**: Asset Service
   - **Plural Label**: Asset Services
   - **Record Name**: Asset Service
8. **Check the following boxes**:
   - **Allow Reports**
   - **Allow Search**
9. **Click "Save"** to create the object.

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

11. **Click the "Home" tab** and enter "Tabs" in the Quick Find search bar.
12. **Select "Tabs"** from the search results.
13. Under **Custom Object Tabs**, click **New**.

14. For **Object**, select **Asset Service**.
15. For **Tab Style**, select any icon that represents your object.

3.The Lightning App

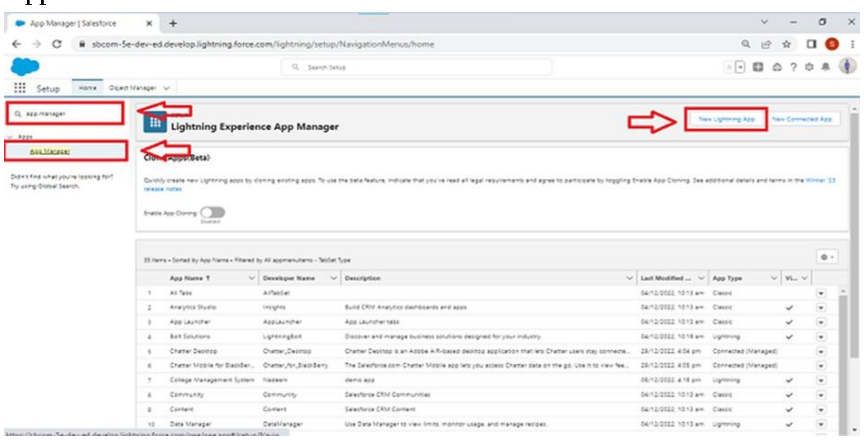
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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

Create a Lightning App

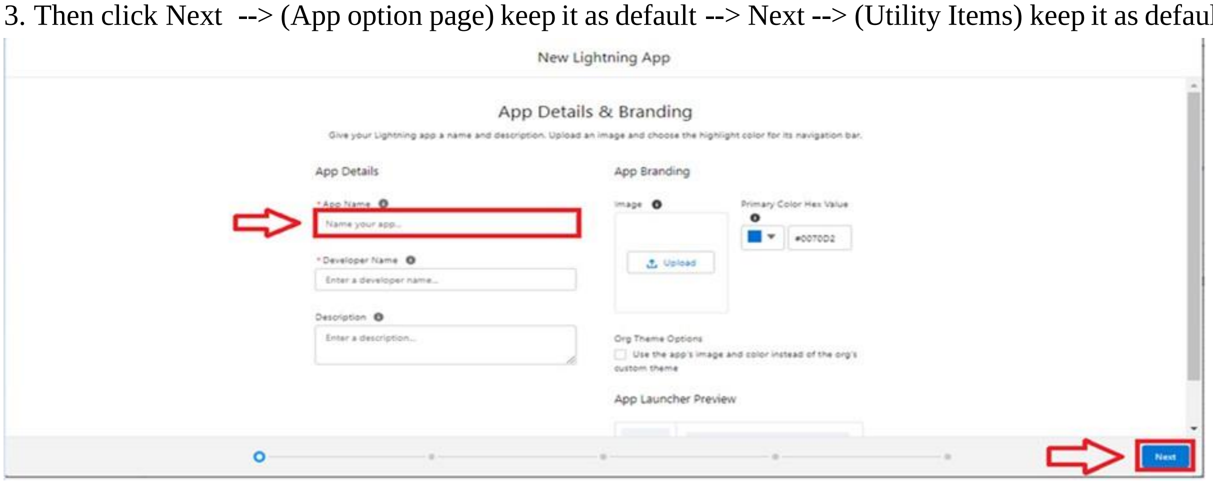
To create a lightning app page:

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

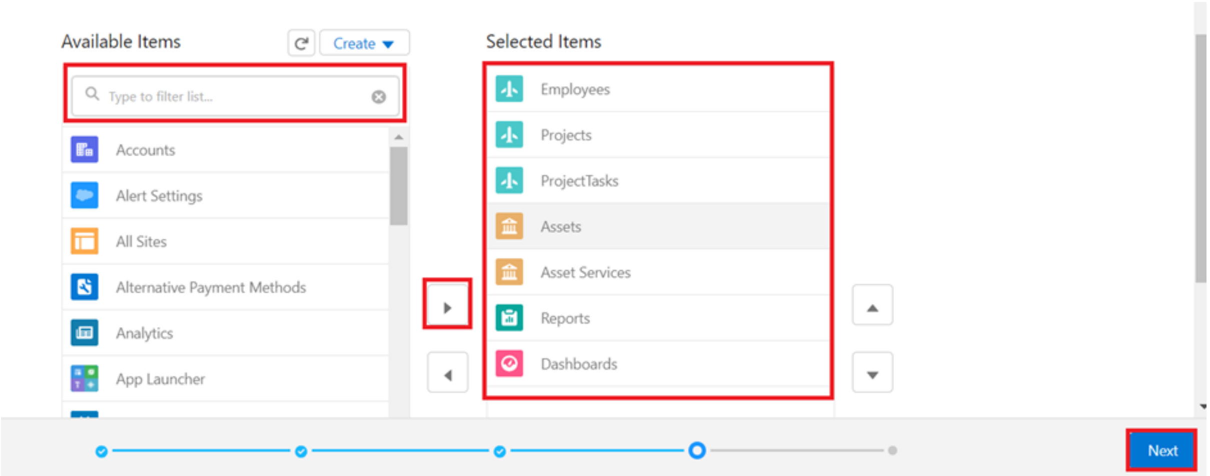


2. Fill the app name in app details and branding as follow
App Name : Workforce Administrator Solution
Developer Name : this will auto populated
Description : Give a meaningful description
Image : optional (if you want to give any image you can otherwise not mandatory)
Primary color hex value : keep this default

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



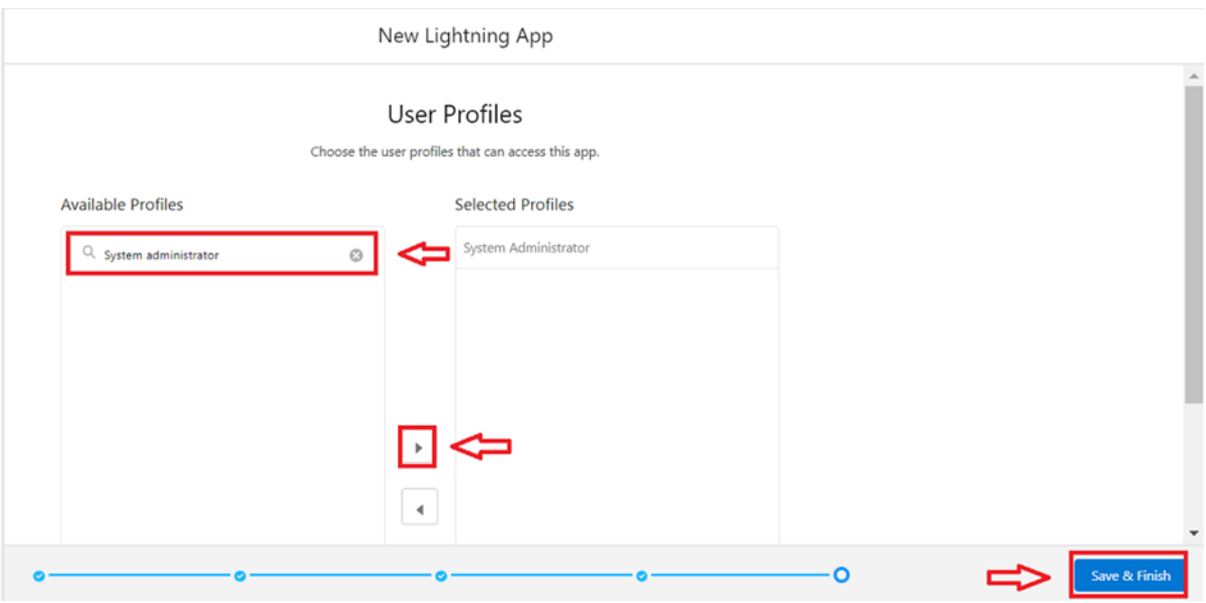
4. To Add Navigation Items:



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.

4. Fields & Relationships

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

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

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

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

Custom Fields:

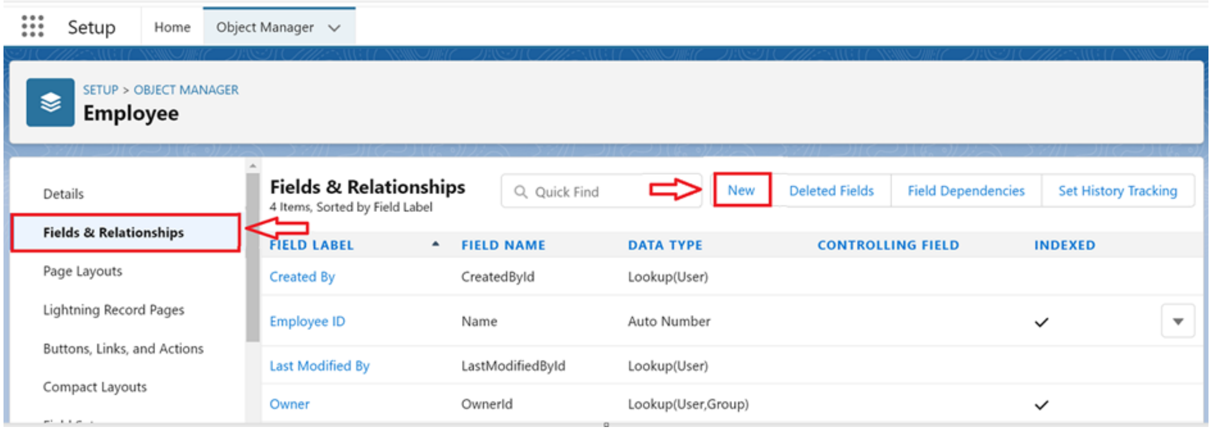
On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on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

Creating Text Field in Employee Object

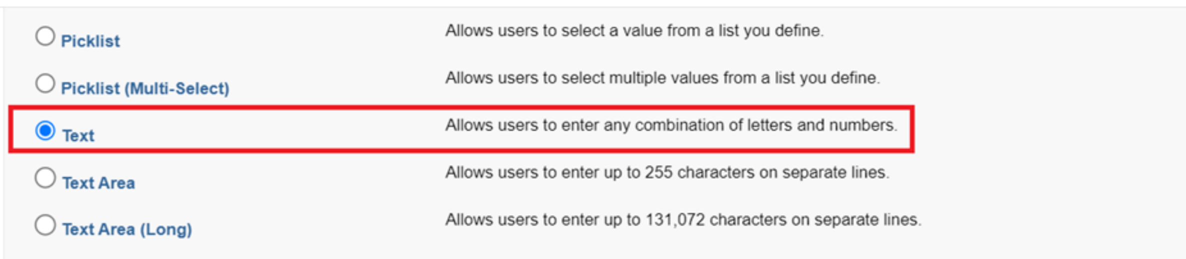
To create fields in an object:

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

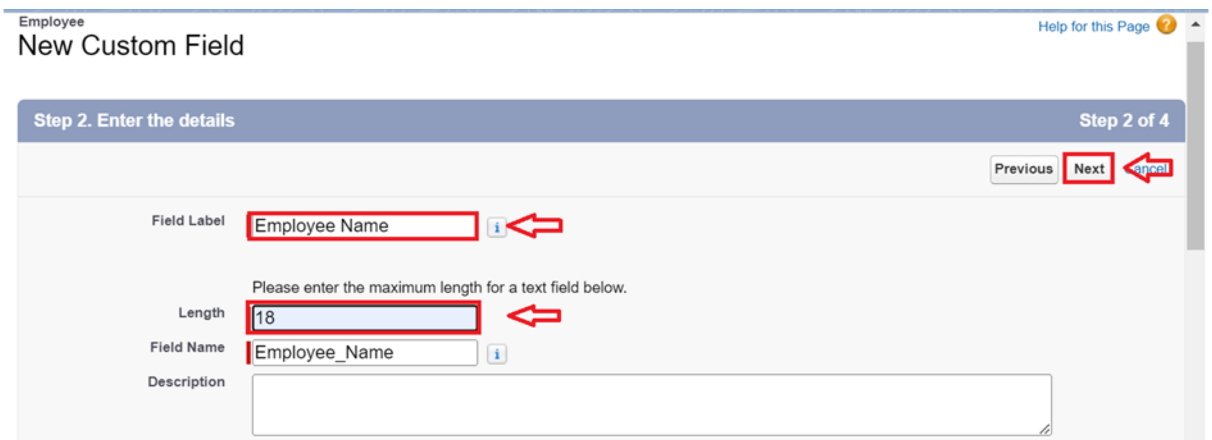
2. Now click on "Fields & Relationships" --> New



3. Select Data type as “Text”.



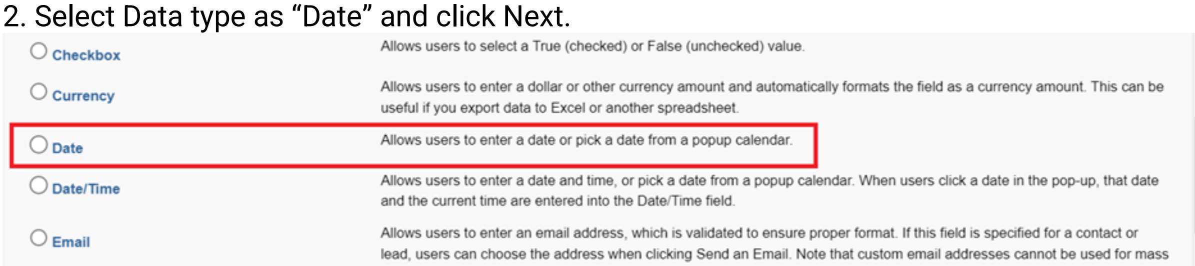
4. Click on Next



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.

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.

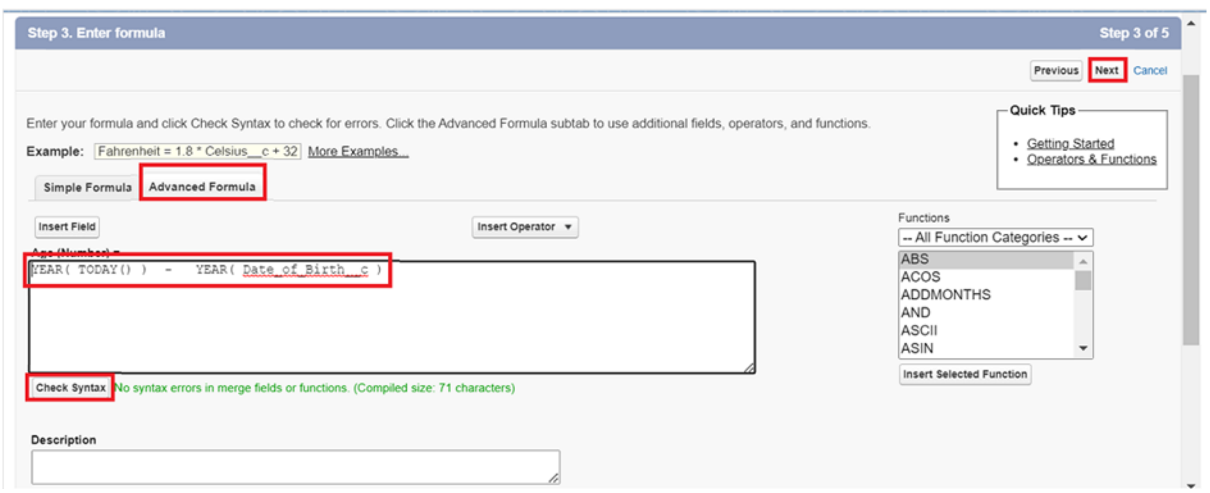


3. Click on Next.
4. Fill the above as following:
a. Field Label: Date of Birth.
b. Field Name : gets auto generated.
c. Click on Next --> Next --> Save and new.

Creating Formula Field in Employee Object

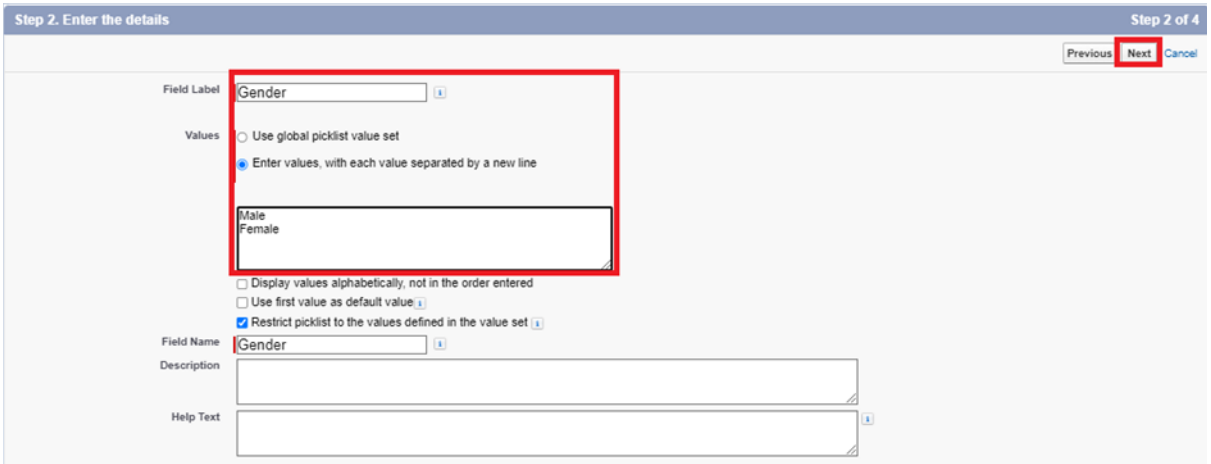
1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “Formula” and click Next.
3. Give Field Label and Field Name as “Age” and select formula return type as “Number” and click next.

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



Creating Picklist Field in Employee Object

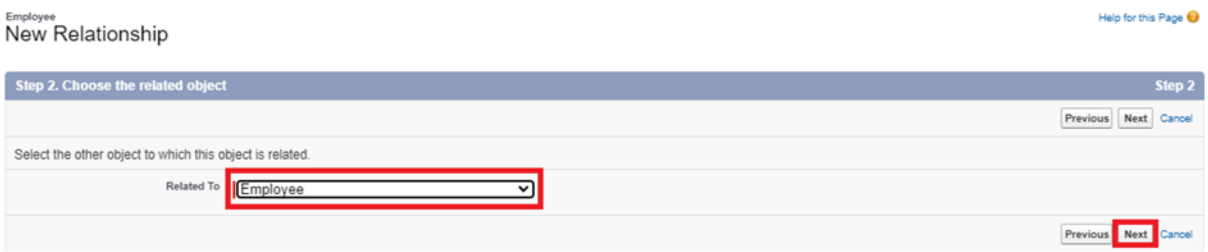
1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “Picklist” and click Next.
3. Enter Field Label as “Gender”, under values select “Enter values, with each value separated by a new line" and enter values as shown below.



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

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.

Creating Master-Detail Relationship between Employee & Asset Object

To Create a Master-Detail relationship

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

Creating Remaining Fields in Employee Object

Repeat the above steps to create many fields.

5. Setting OWD

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

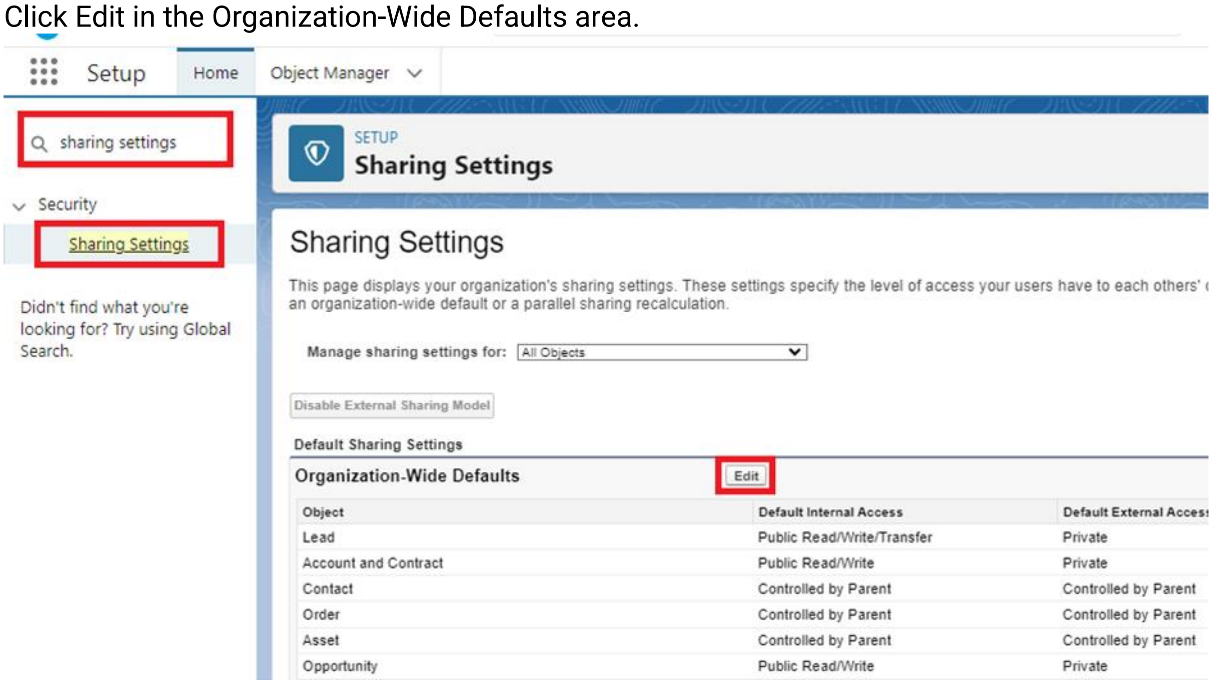
Primarily, there are four levels of access that can be set in Salesforce OWD and they are-

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

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

Create OWD Setting

1. Go to Set Up --> in the Quick Find box type "Sharing Settings" --> click on it.
2. Click Edit in the Organization-Wide Defaults area.



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.

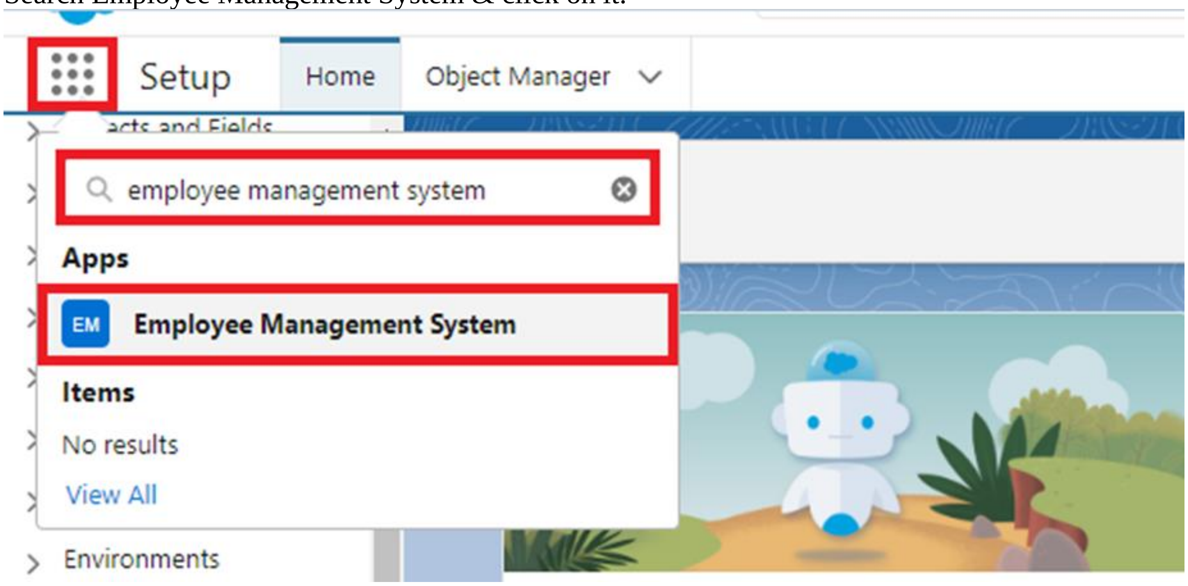
Set OWD as Private for Project and Asset Service objects.

6.User Adoption

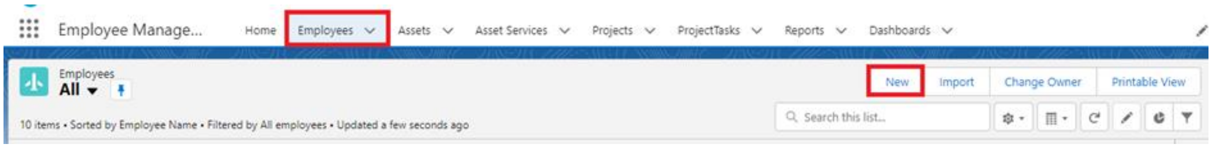
As a new Administrator, I perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuring data access, and much more.

Create a Record (Employee)

1. Click on App Launcher on the left side of the screen.
2. Search Employee Management System & click on it.



3. Click on the Employee tab.
4. Click New.



5. Fill the Details and click on Save.

View a Record (Employee)

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

Delete a Record (Employee)

1. 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.

7. Import Data

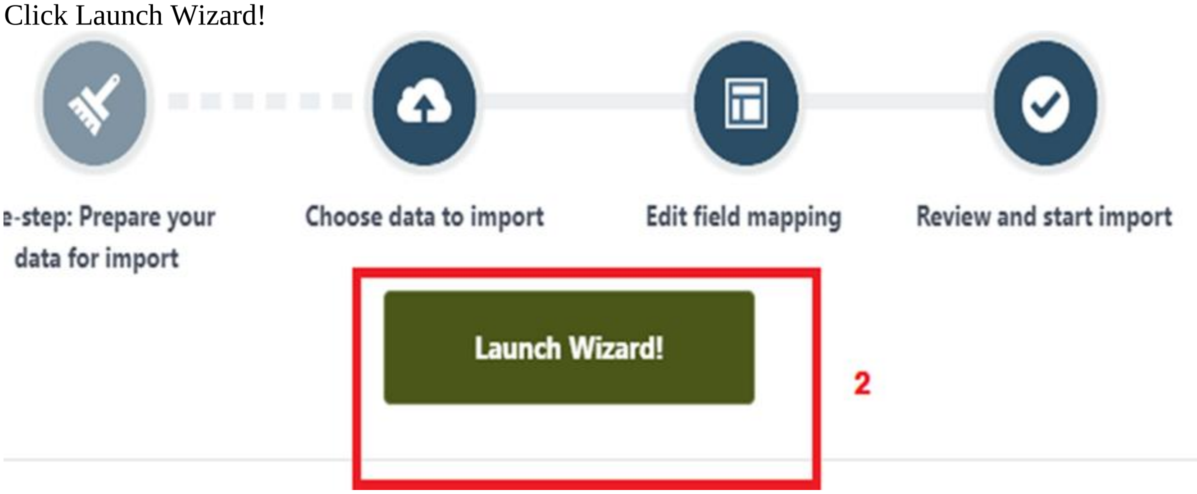
Link: https://tinyurl.com/SF-Employee-Data

Before creating the application download this file from the URL given below and save the file in CSV.
Data Import lets to upload data from external sources and combine it with data you collect via Analytics.
Use Analytics to organize and analyze all data in ways that better reflect your business.
The Data Import Wizard is a Tool makes it easy to import data for many standard Salesforce objects, including accounts, contacts, leads, solutions, campaign members, and person accounts. You can also import data for custom objects.

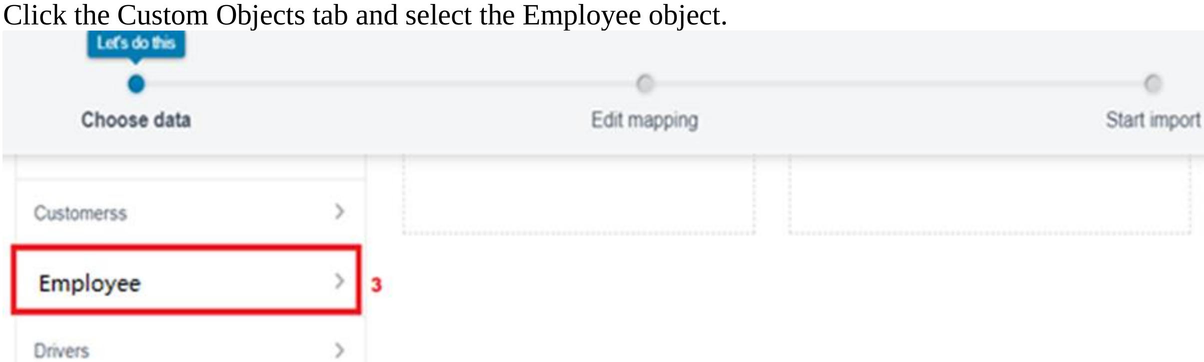
Importing data using Data Wizard

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

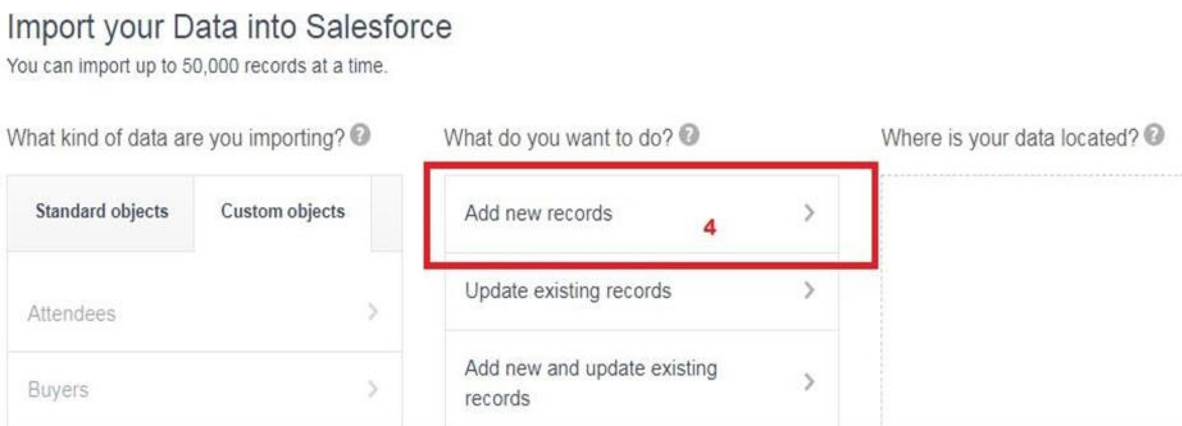
3. Click Launch Wizard!



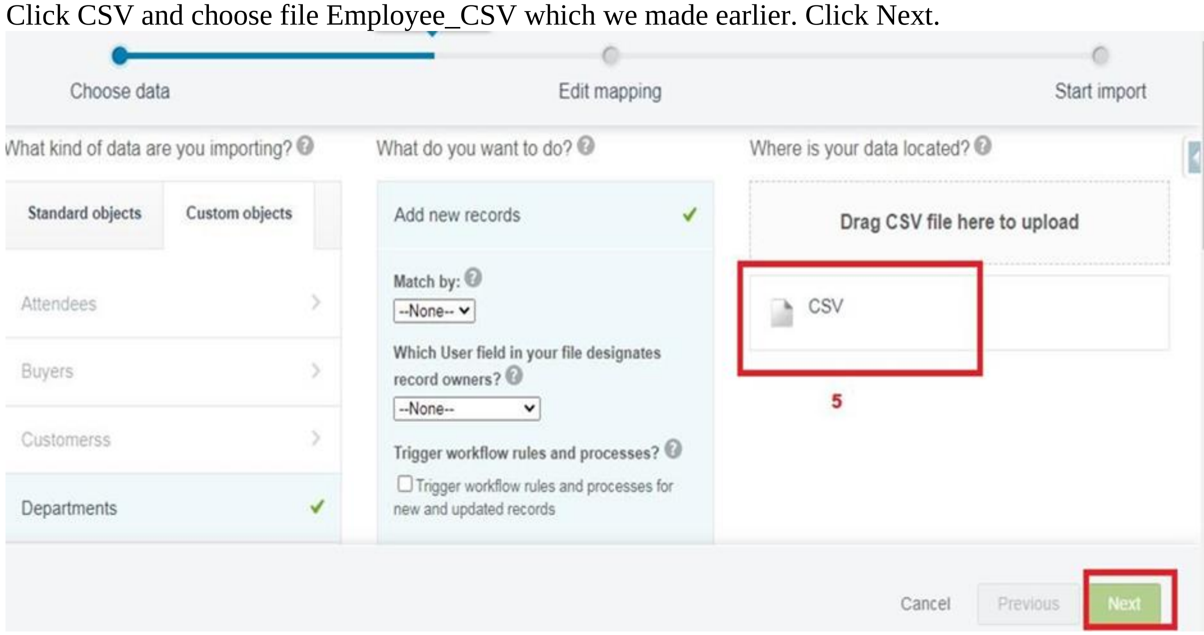
4. Click the Custom Objects tab and select the Employee object.



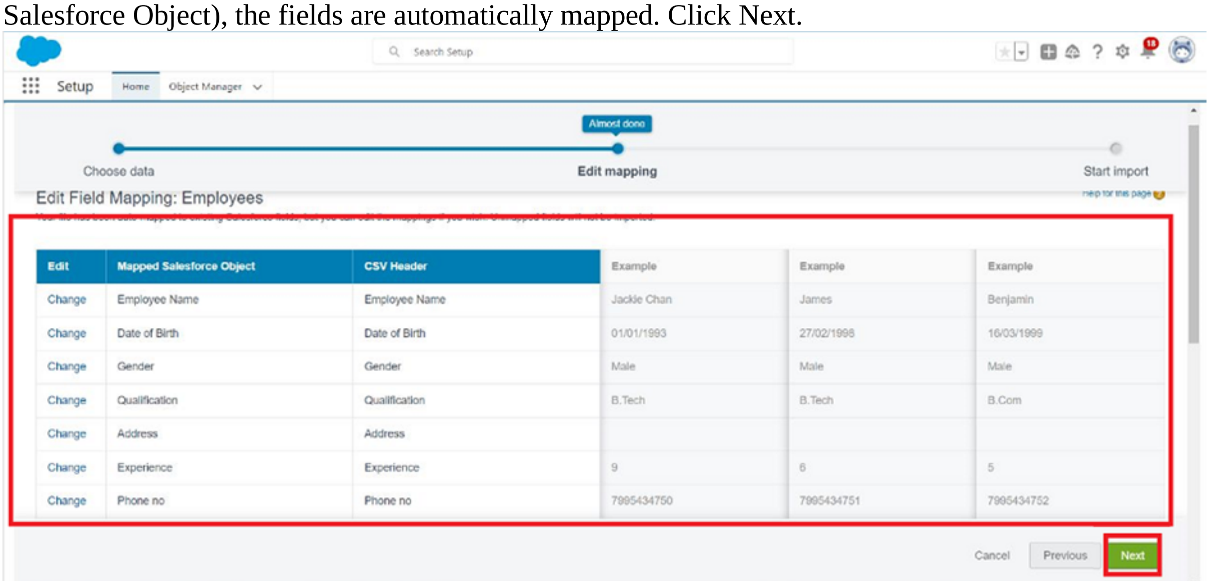
5. Select Add new records.



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

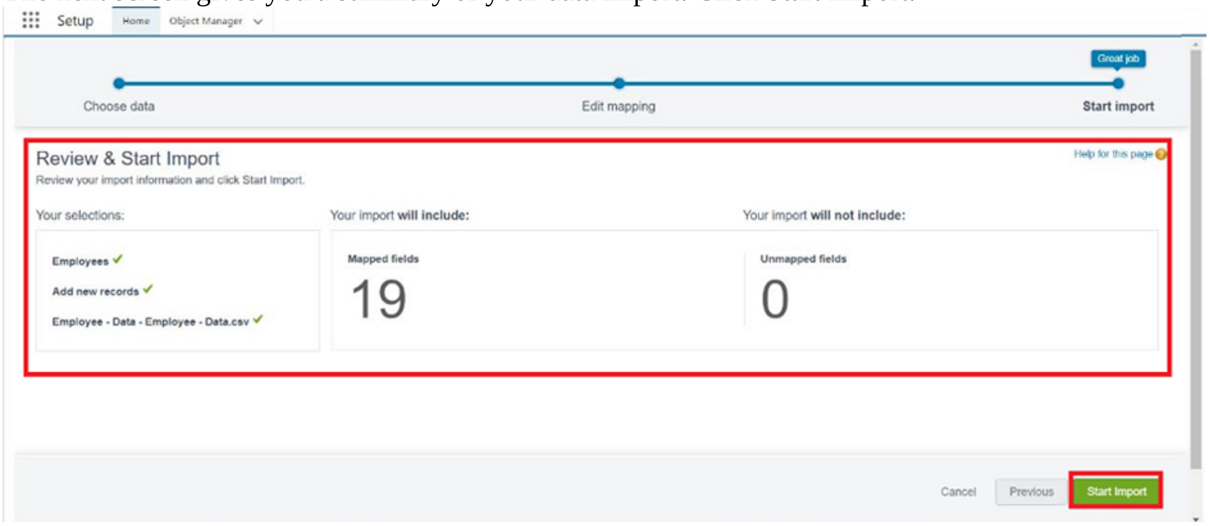


7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.

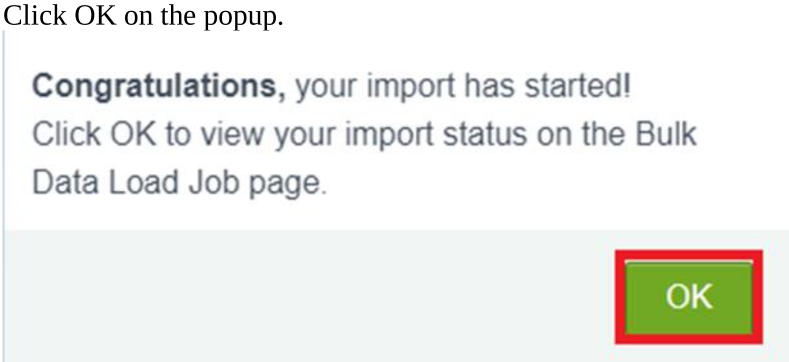


Note: no need to map “Reports to” field. The Data Import Wizard is designed to handle basic data import tasks and does not support mapping relationships between records.

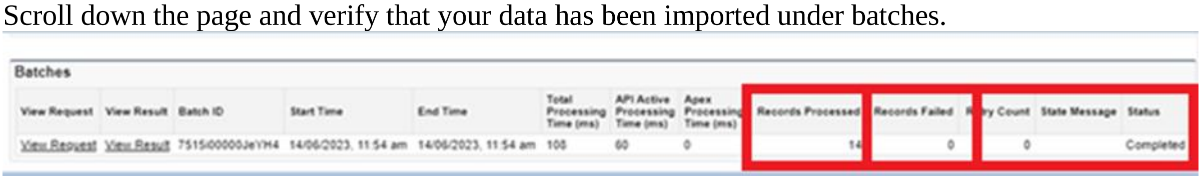
8. The next screen gives you a summary of your data import. Click Start Import.



9. Click OK on the popup.



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



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

8.Profiles

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

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

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

We cannot deleted standard ones

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

2. Custom Profiles:

Custom ones defined by us.

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

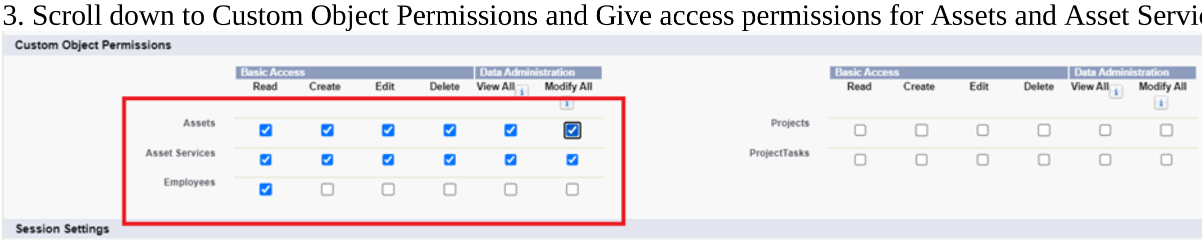
HR Profile

To create a new profile:

1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (Standard user) --> enter profile name (HR) --> Save.

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.

Manager Profile

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

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

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

4. Scroll down and Click on Save.

Create Employee Profile

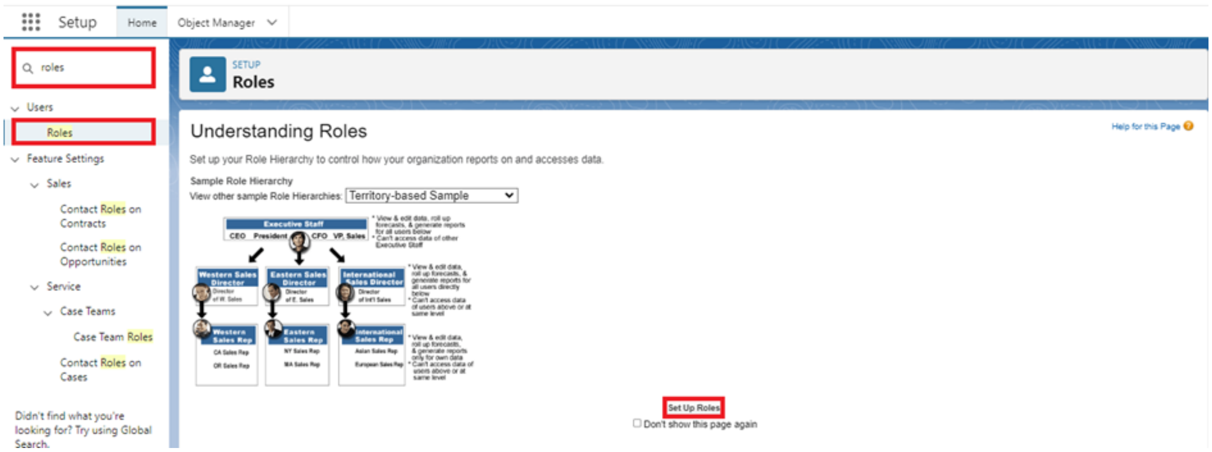
Create Employee Profiles for “On Site Employee”,”Remote Employee” as in above, but in step 3 only allow permission access for Project and Project Task objects.

9.Role

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

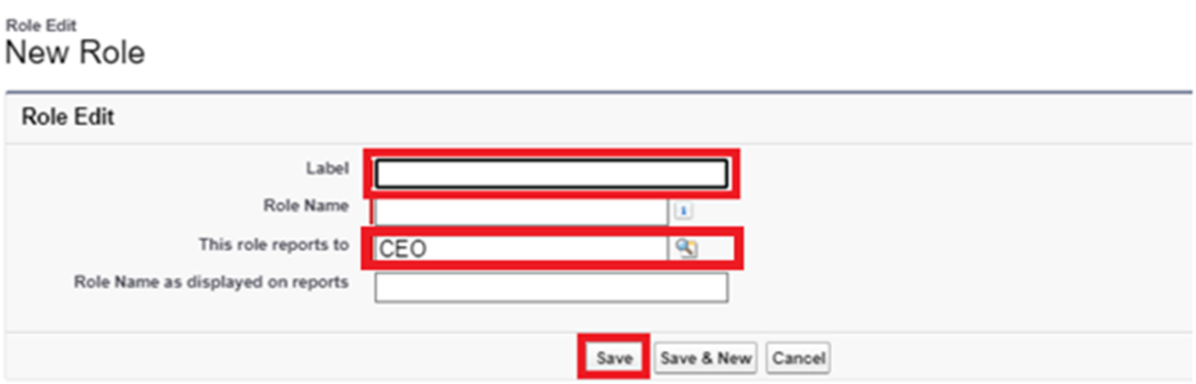
Creating HR Role

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

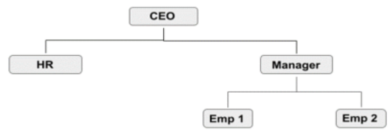


2. Click on Expand All and click on add role under whom this role works.

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



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



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

Creating more roles

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

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

10.Users

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

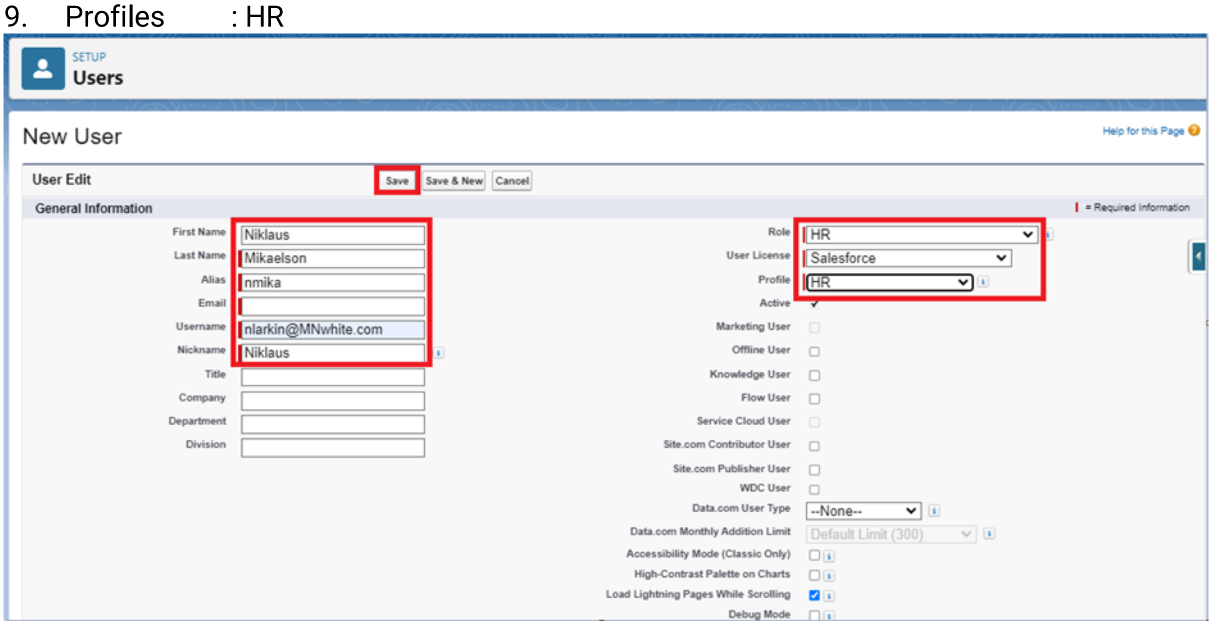
Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access. Each user account contains at least the following:

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

Create User

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

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



3. Save.

Creating another user

1. Go to setup --> type users in quick find box --> select users --> click New user.
2. Fill in the fields
    1 First Name : Kol
    2 Last Name : Mikaelson
    3 Alias : Give a Alias Name
    4 Email id : Give your Personal Email id
    5 Username : Username should be in this form: text@text.text
    6 Nick Name : Give a Nickname
    7 Role : Manager
    8 User license : Salesforce Platform
    9 Profiles : Manager
3. Save.

Creating more users

Create two more users as we created in above.

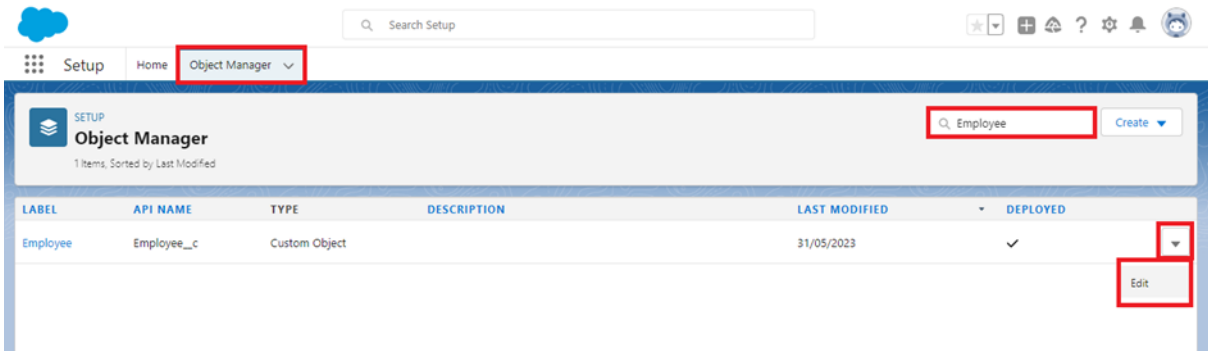
11.Page layouts

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

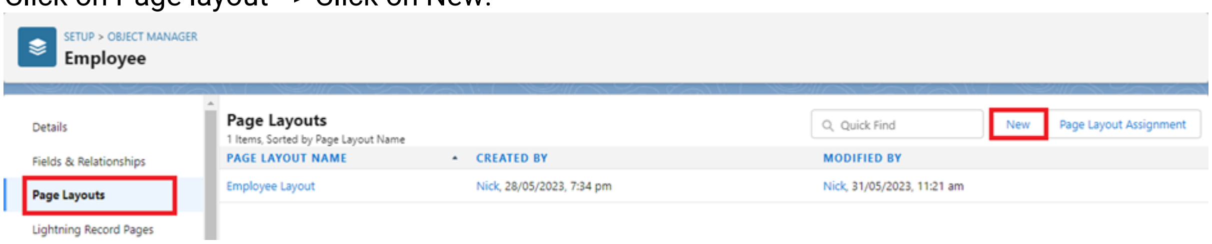
creating a page layout for Employee object

To Create a Page layout:

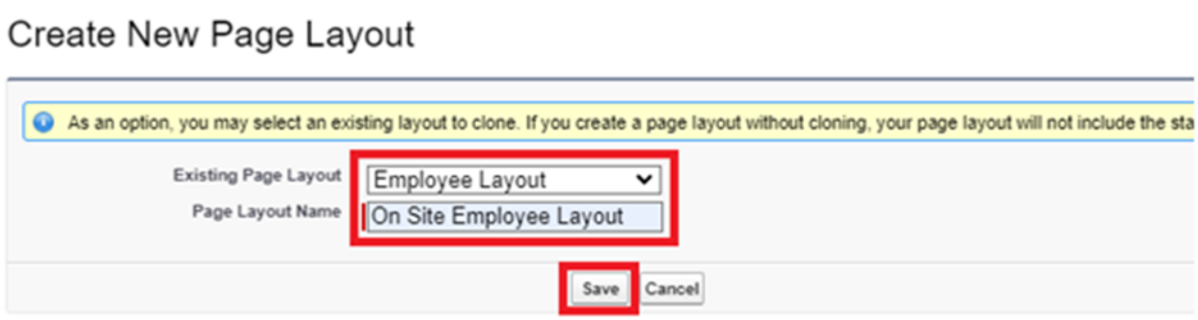
1. Go to Setup --> Click on Object Manager --> Search for the object (Employee) --> From drop down click on Edit.



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



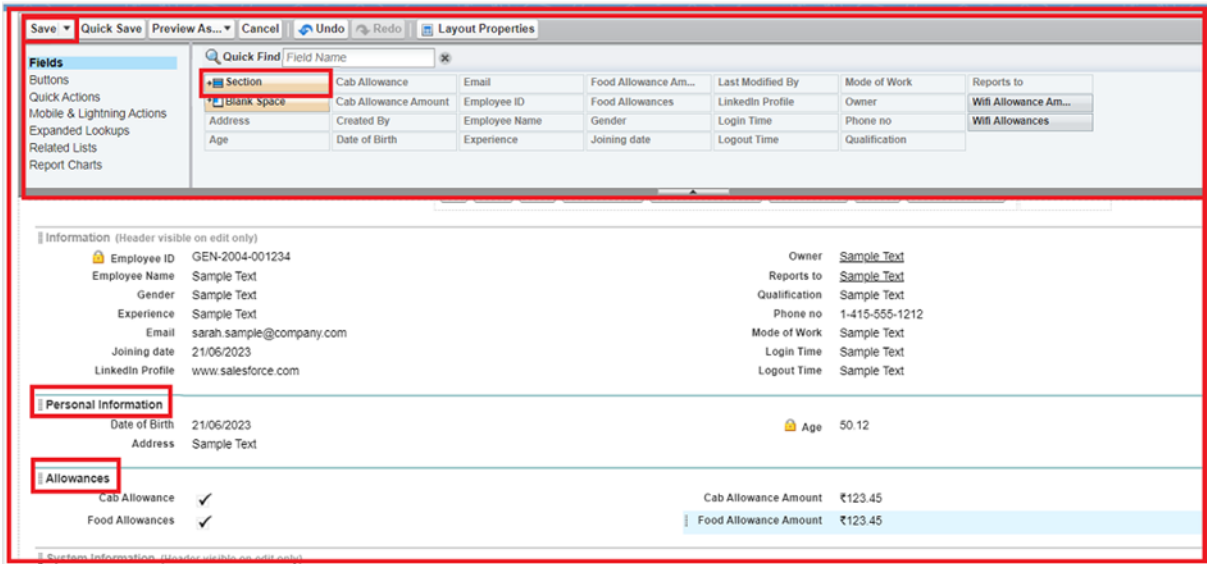
3. Give Page layout Name as “On Site Employee Layout” and click on Save.



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.

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.



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

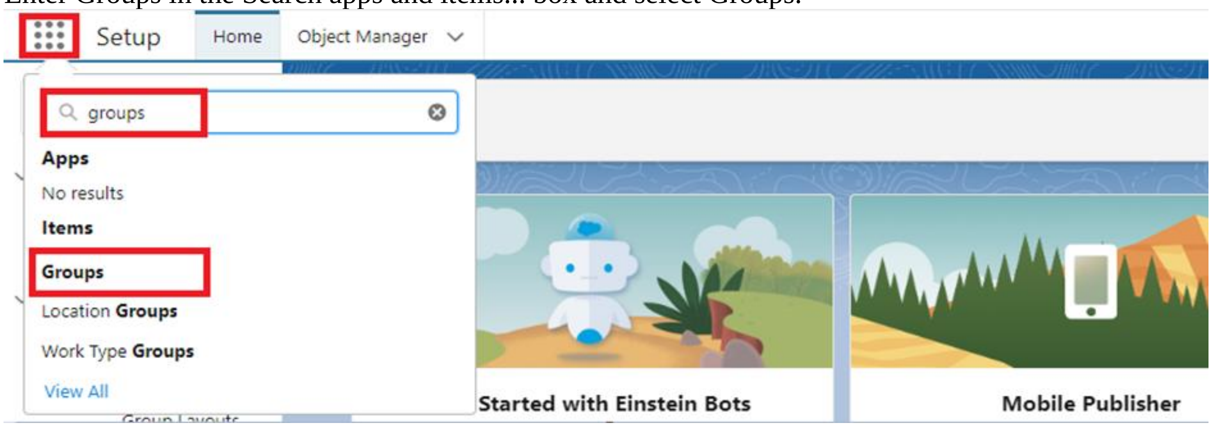
12.Chatter Group

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

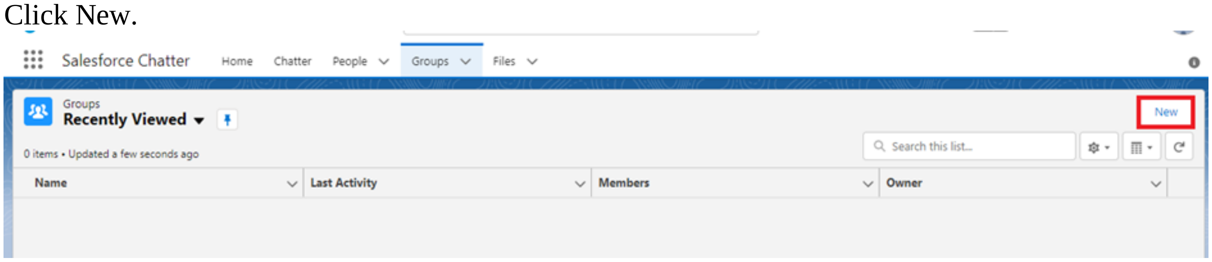
Creating a chatter group for your organization.

To Create a chatter group:

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

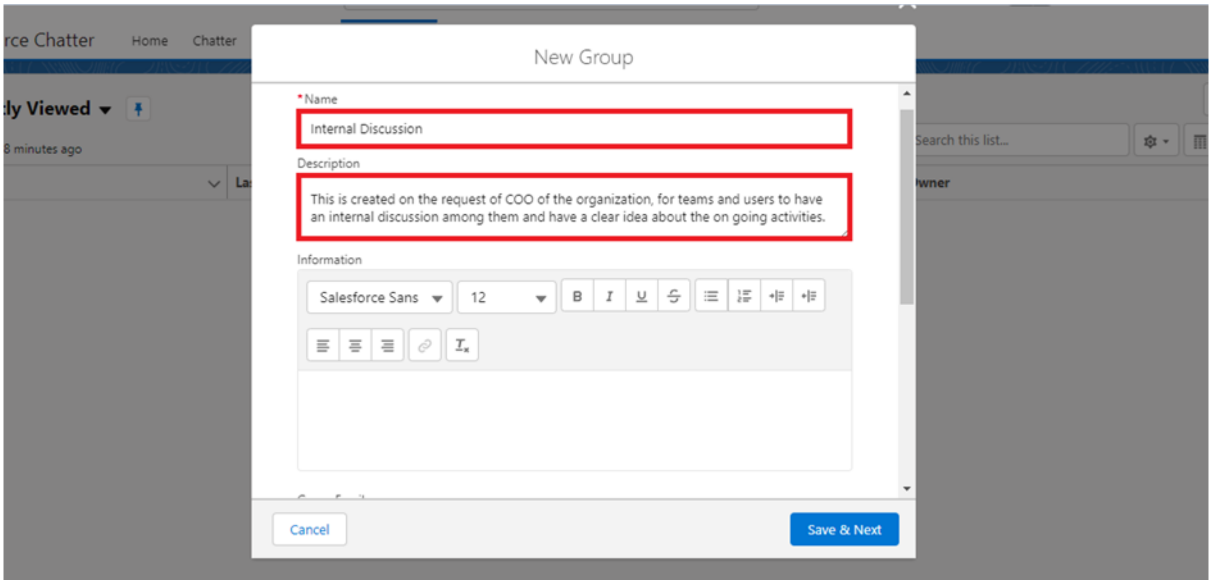


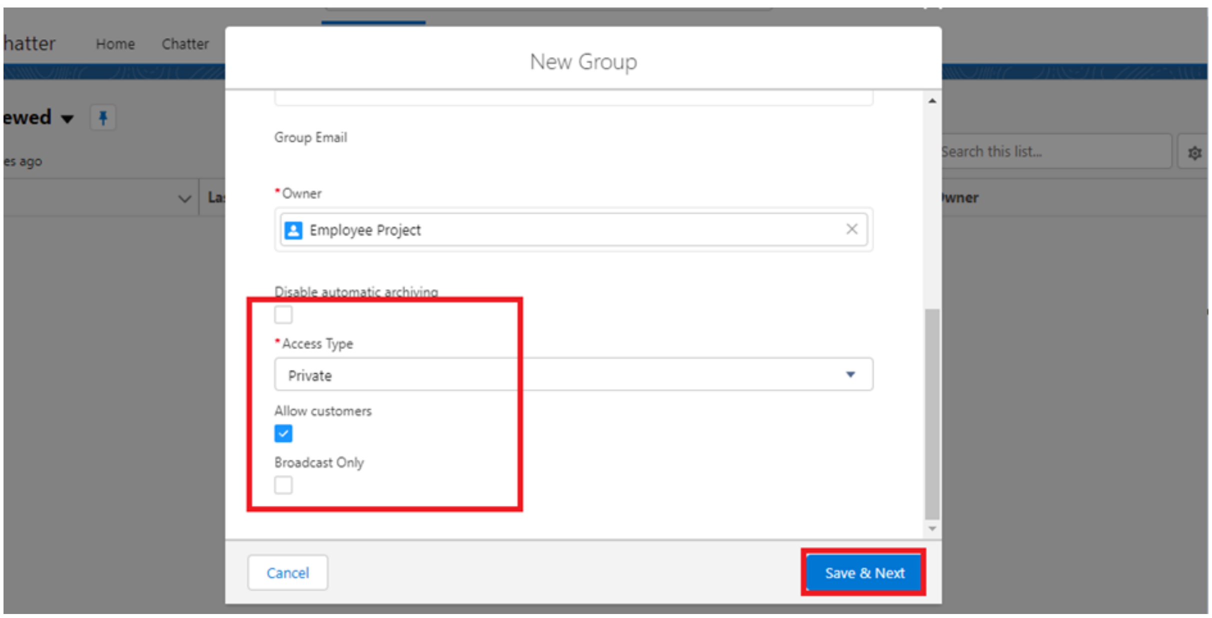
3. Click New.



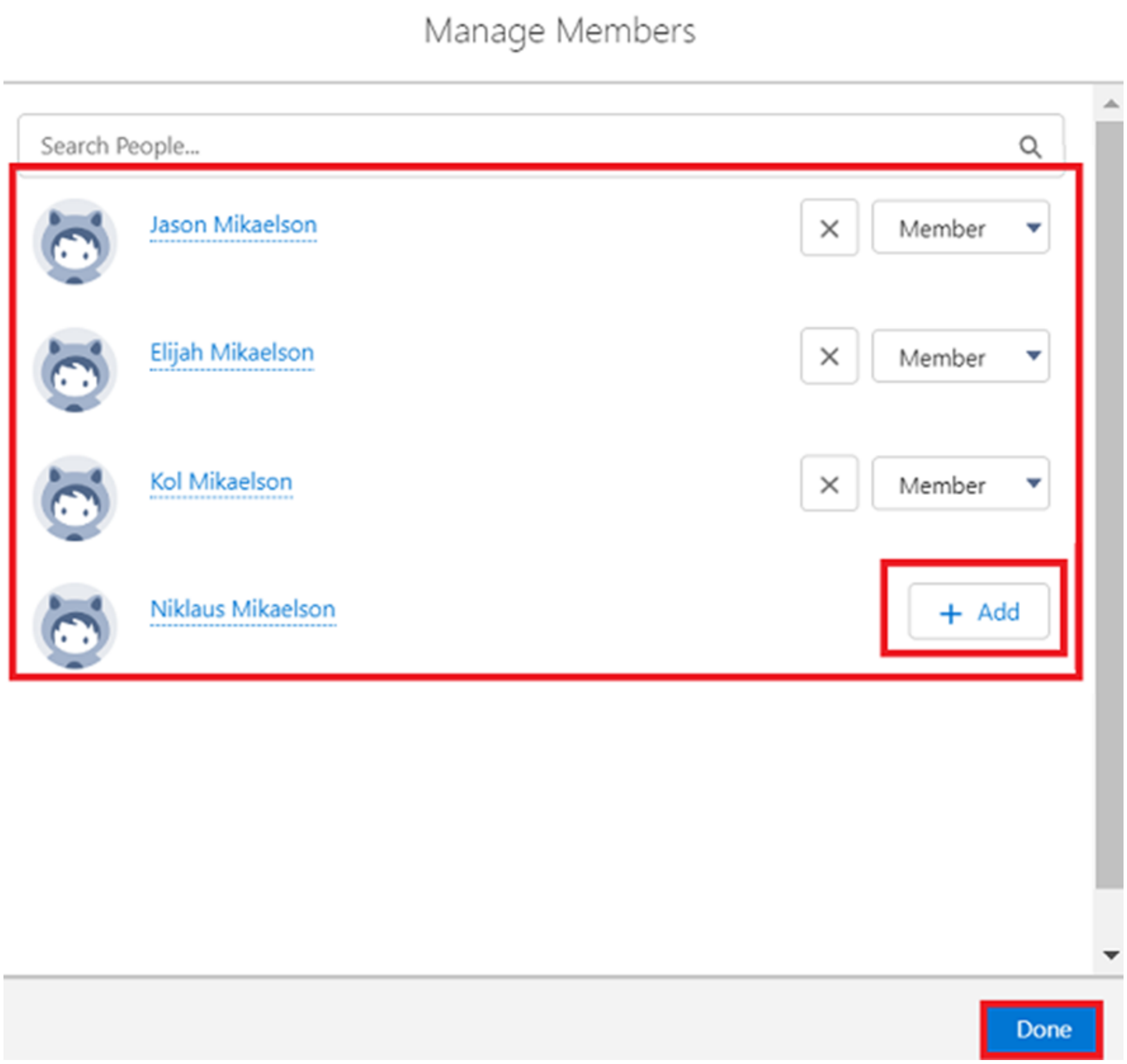
4. Fill in the new group information with these details:

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

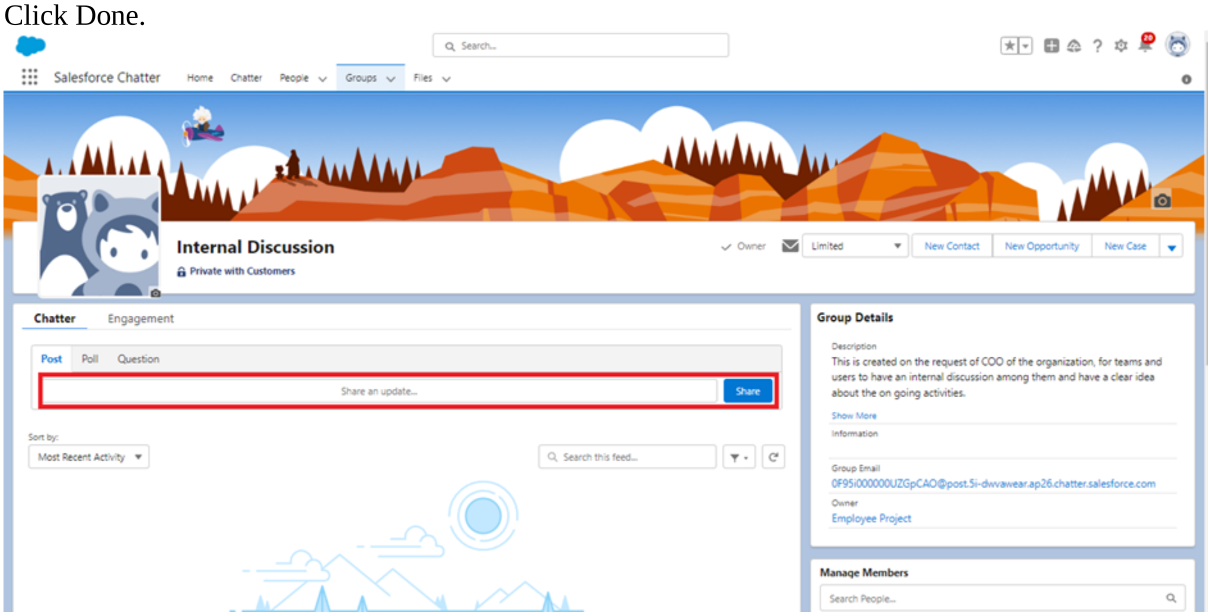




5. Click Save & Next. Skip the Upload Picture section and click Next.
6. On the Manage Members screen, click Add next to users you created in the previous activity.



7. Click Done.



8. This is how your group interface looks like.

9. Where it says Share an update, post this message to the group: Welcome to the Internal Discussion Group, here you can post anything which is related to ongoing projects.
10. Click Share.
    Note: You can like or comment on this post.

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

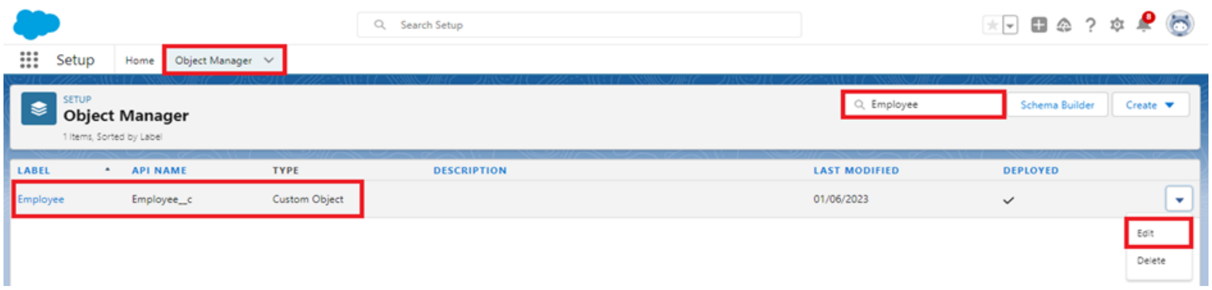
13.Record Types

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

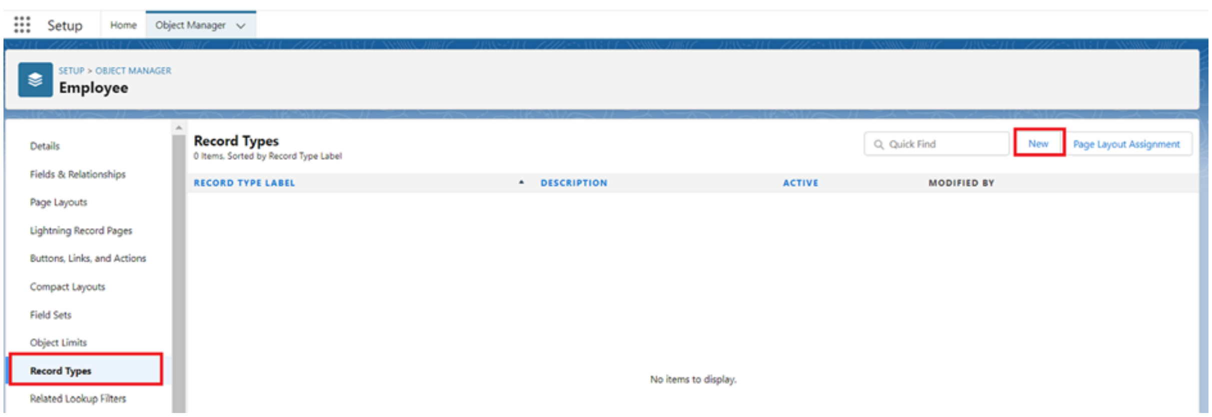
Creating On Site Employee Record Type

To create a Record Type:

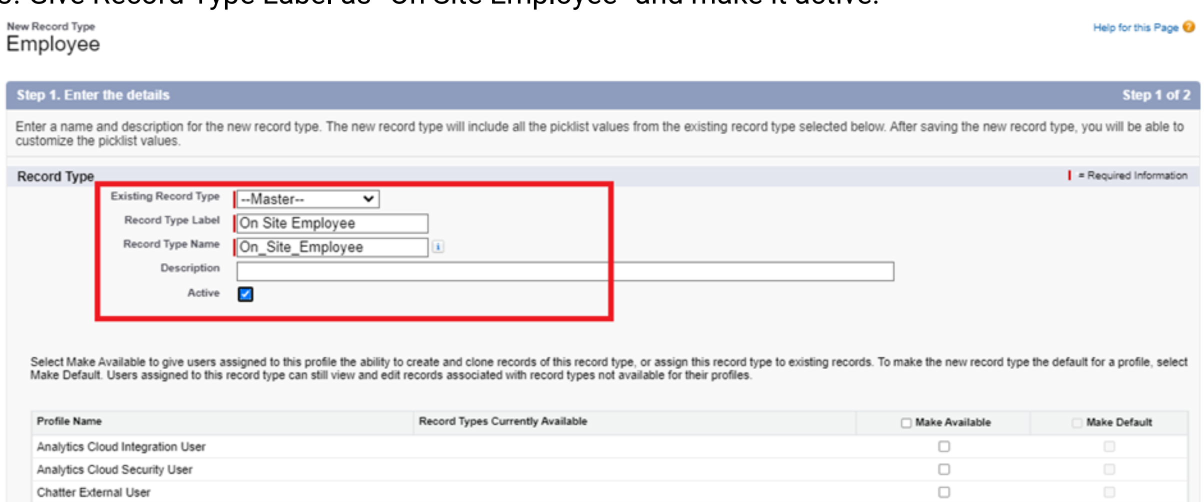
1. Go to Setup --> click on Object Manager --> Search for the object (Employee) --> from drop down click Edit.



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

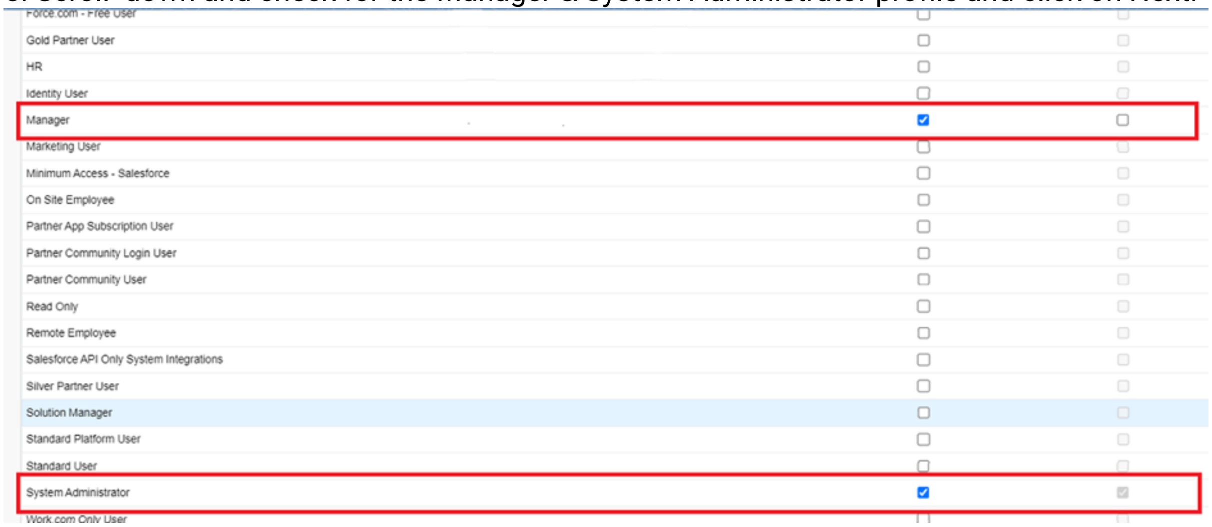


3. Give Record Type Label as “On Site Employee” and make it active.

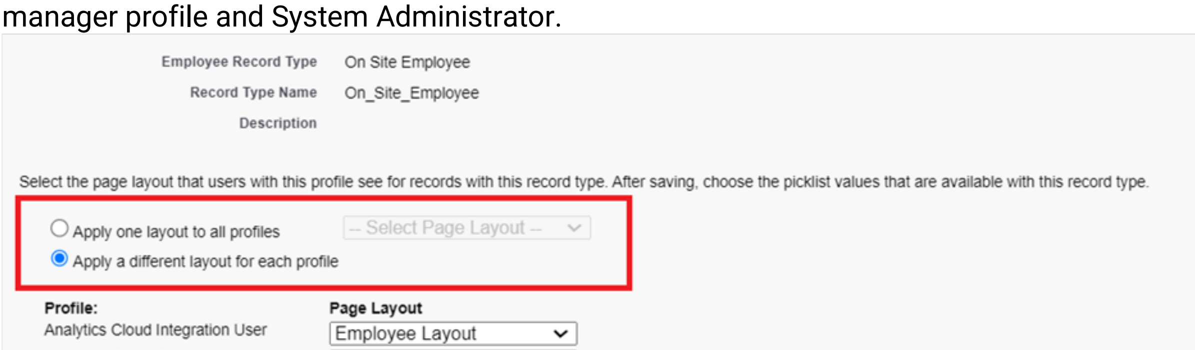


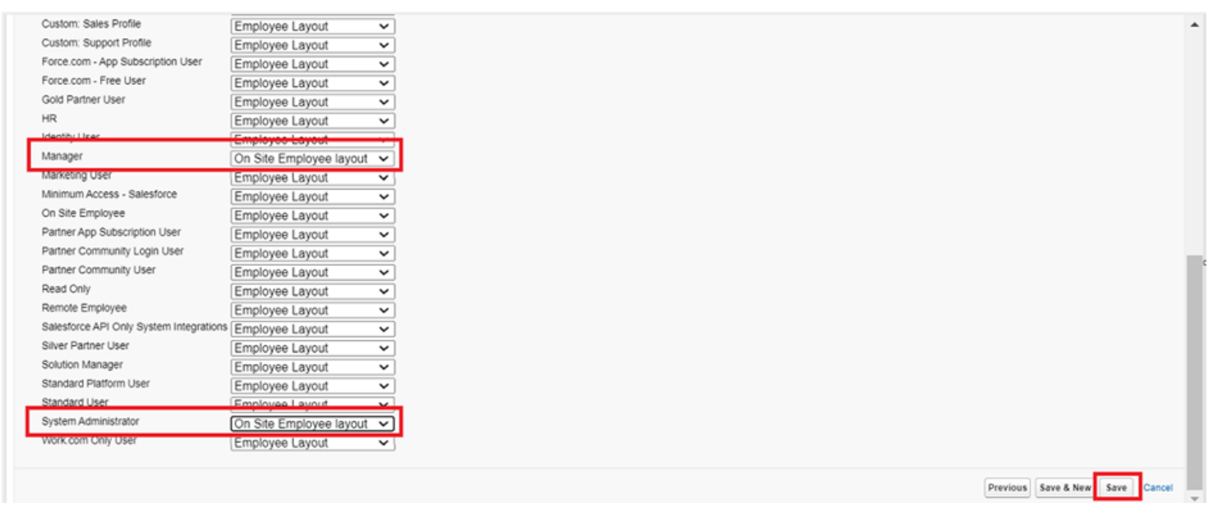
4. Uncheck for “Make Available”.

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.

Creating "Remote Employee" Record Type

Create another Record Type with name “Remote Employee” as above.

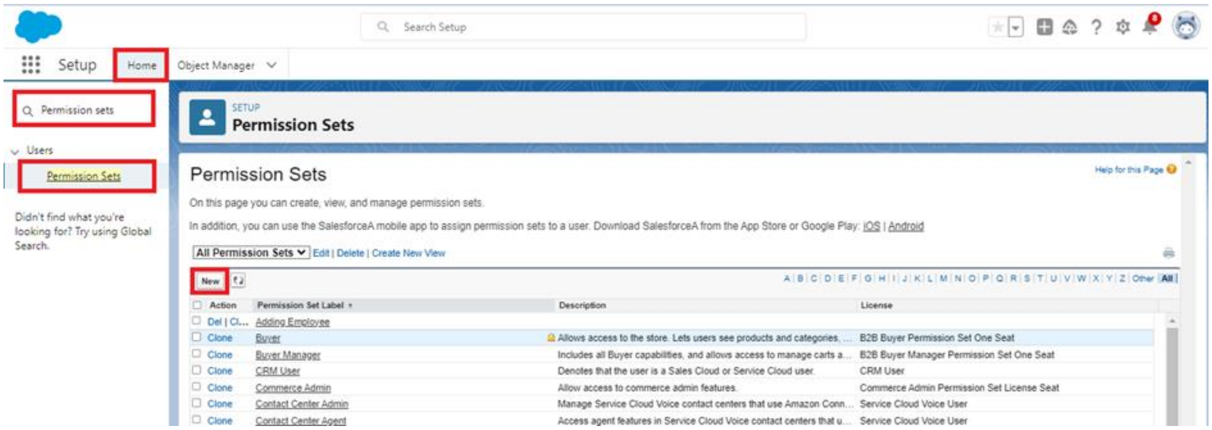
14.Permission sets

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

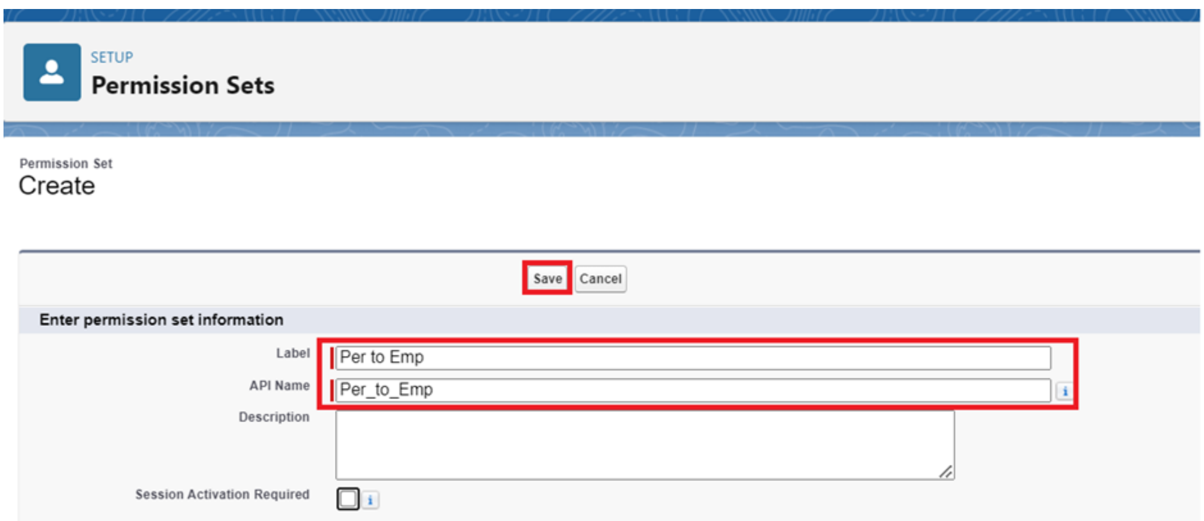
Creating a permission set

To Create a Permission Set:

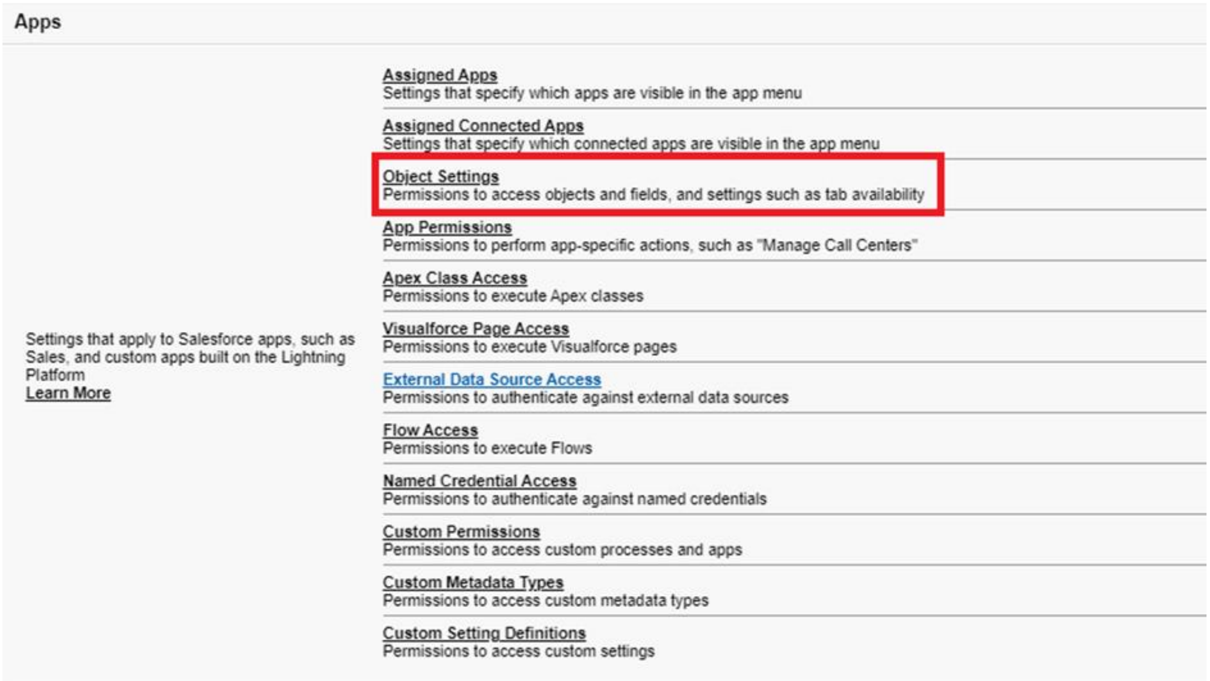
1. Go to setup --> type “permission sets” in quick search --> select permission sets --> New.



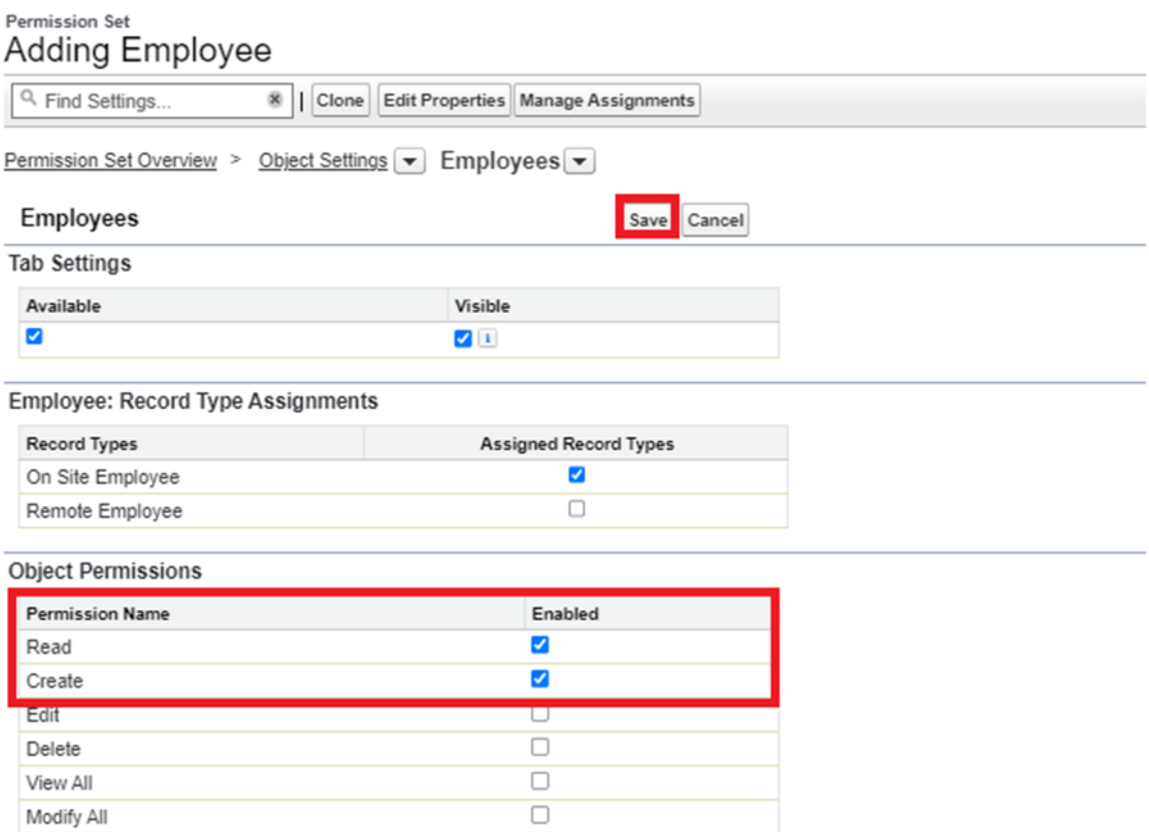
2. Enter the label name as “Per to Emp” --> Save.



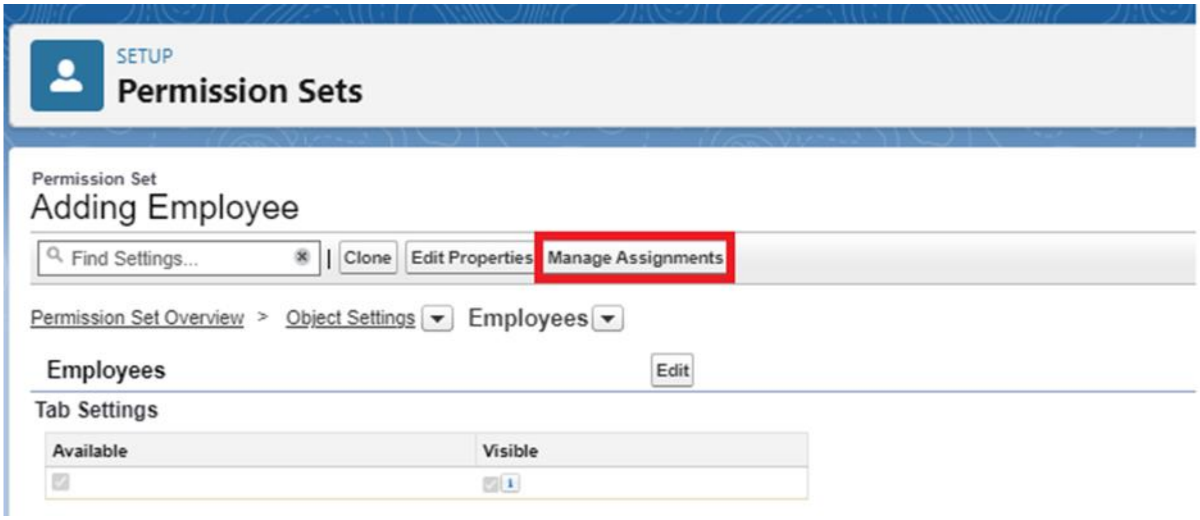
3. Under Apps Select object settings.



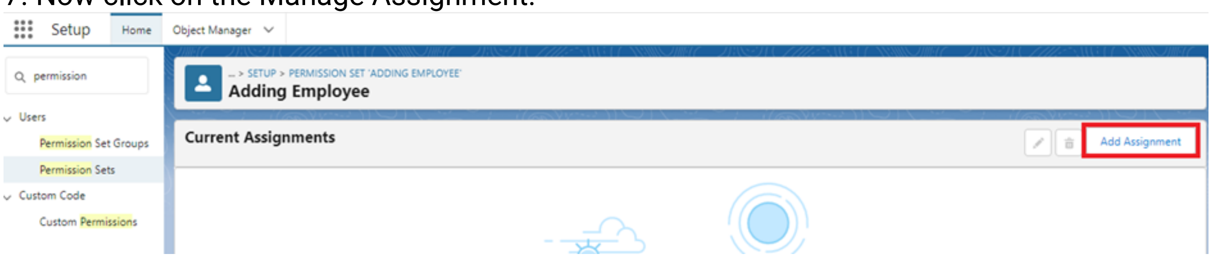
4. Click on Employee object --> click on Edit --> under object permission check for read and create.



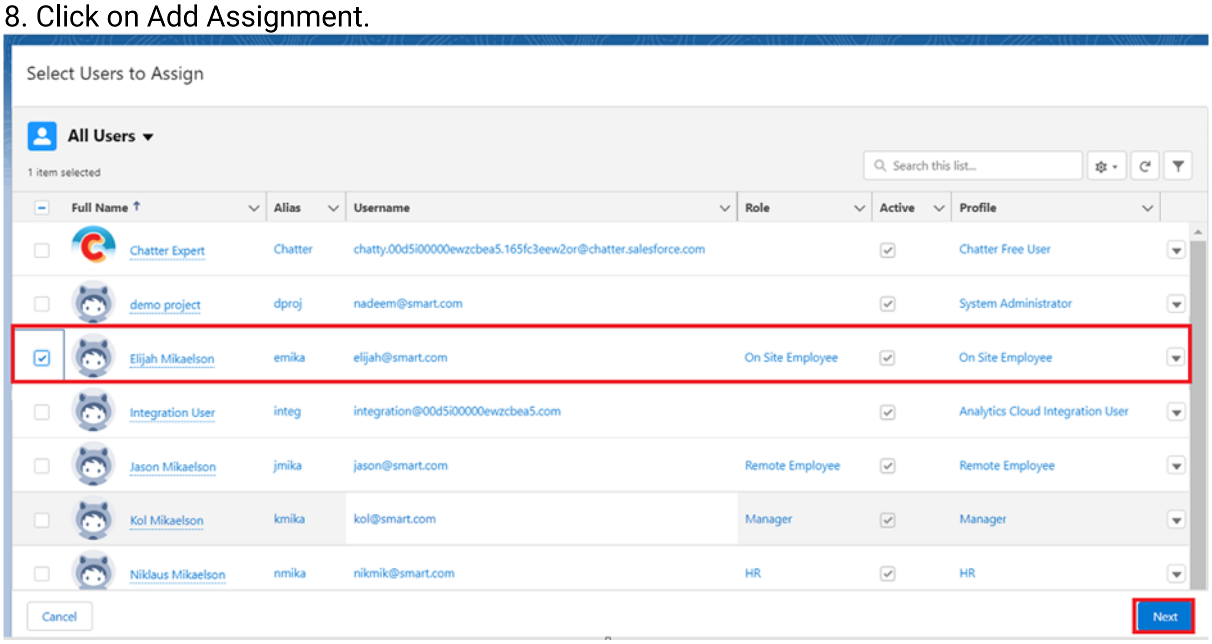
5. Click on Save.
6. After saving the permission click on the Manage assignment



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.

15.Reports

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

Types of Reports in Salesforce

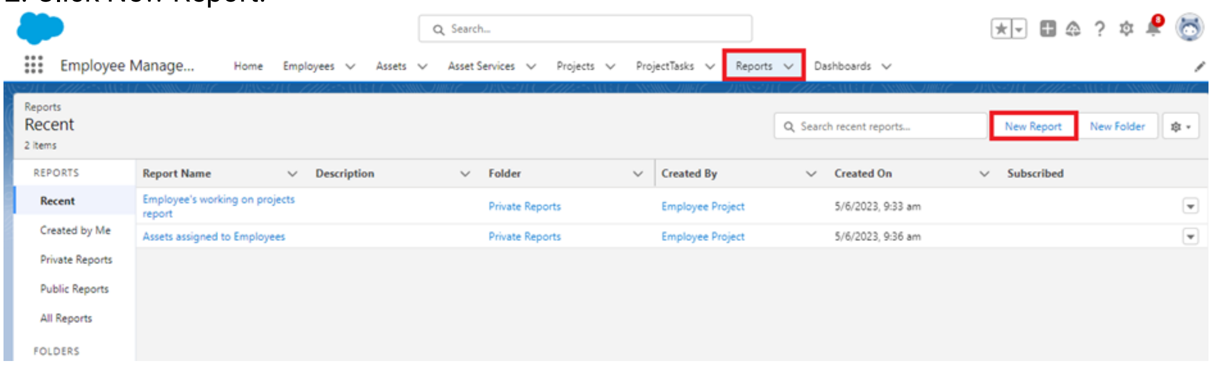
1. Tabular
2. Summary
3. Matrix
4. Joined Reports

Create Report

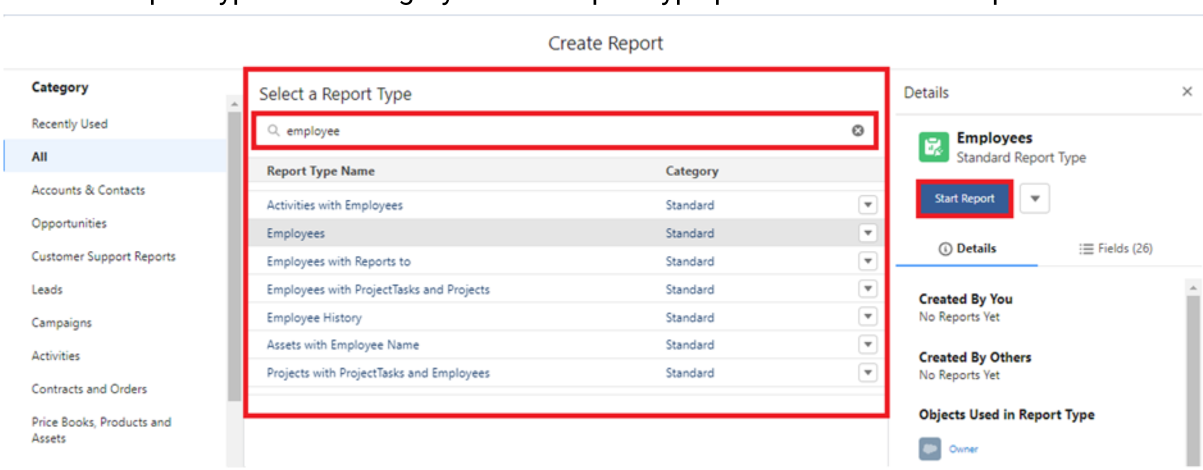
To Create a Report:

1. Go to the app --> click on the reports tab

2. Click New Report.

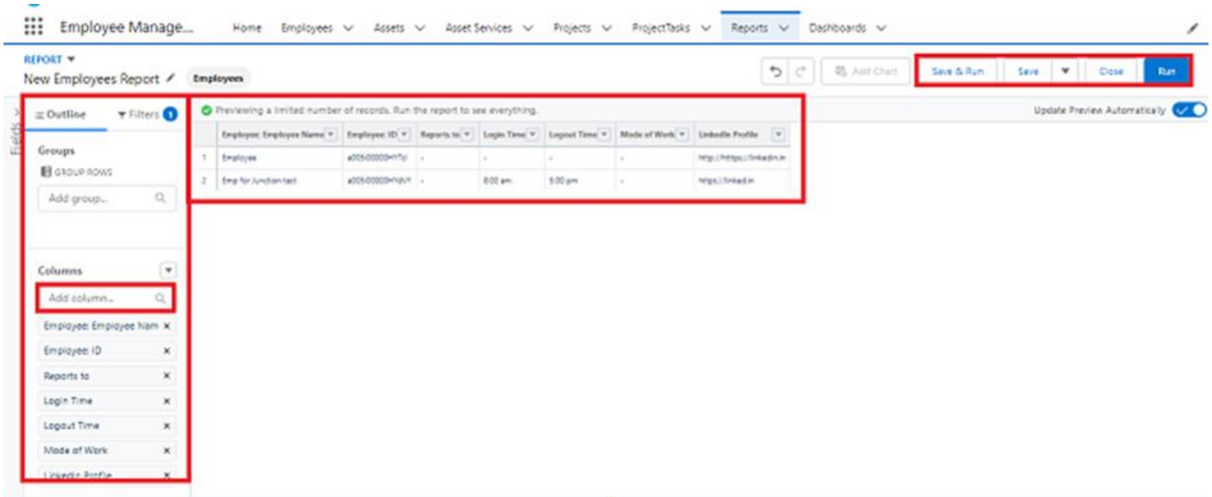


3. Select report type from category or from report type panel or from search panel --> click on start report.



4. Customize your report

--> Add fields from left pane as shown below



5. Save or run it.

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

Create 2 more Report

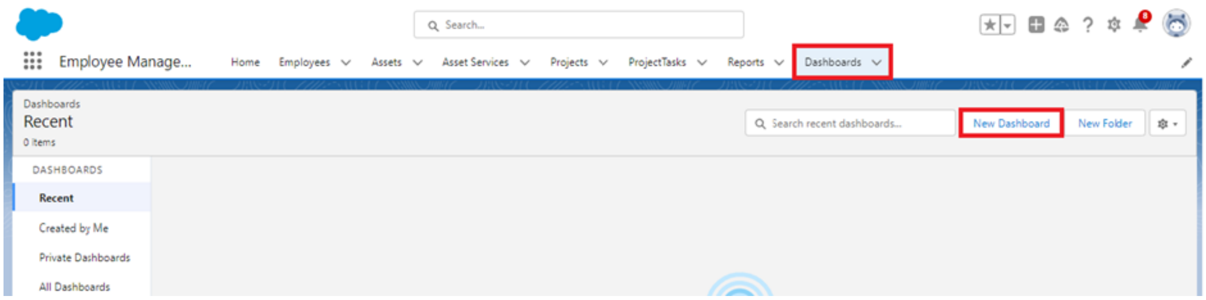
1. Create a report with report type: “Employees with ProjectTasks and Projects”.
2. Create a report with report type: “Employees with Assets”.

16.Dashboards

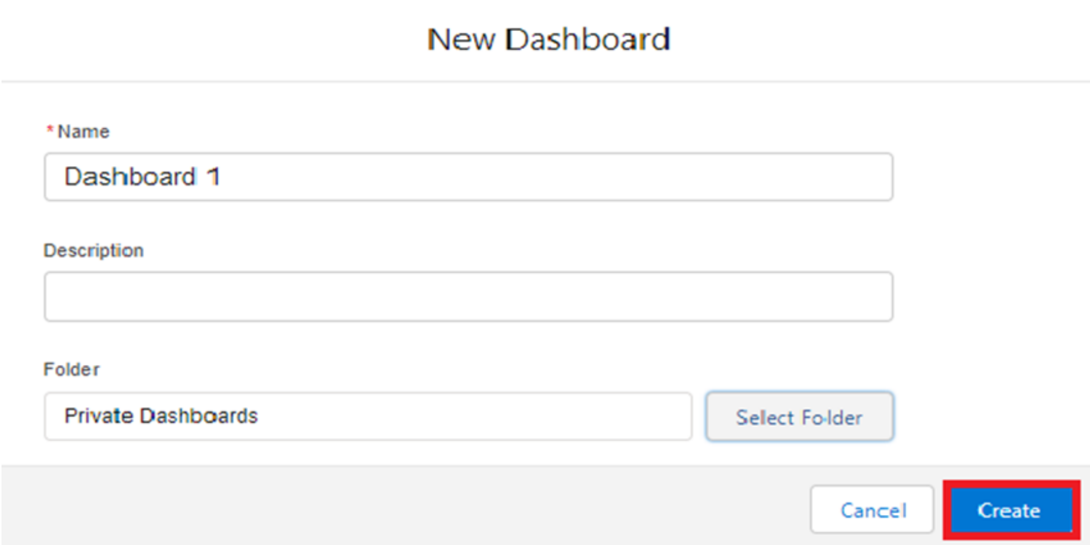
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing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

To Create a Dashboard

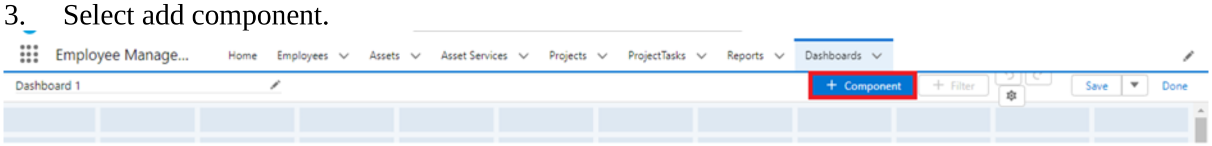
1. Go to the app --> click on the Dashboards tabs.



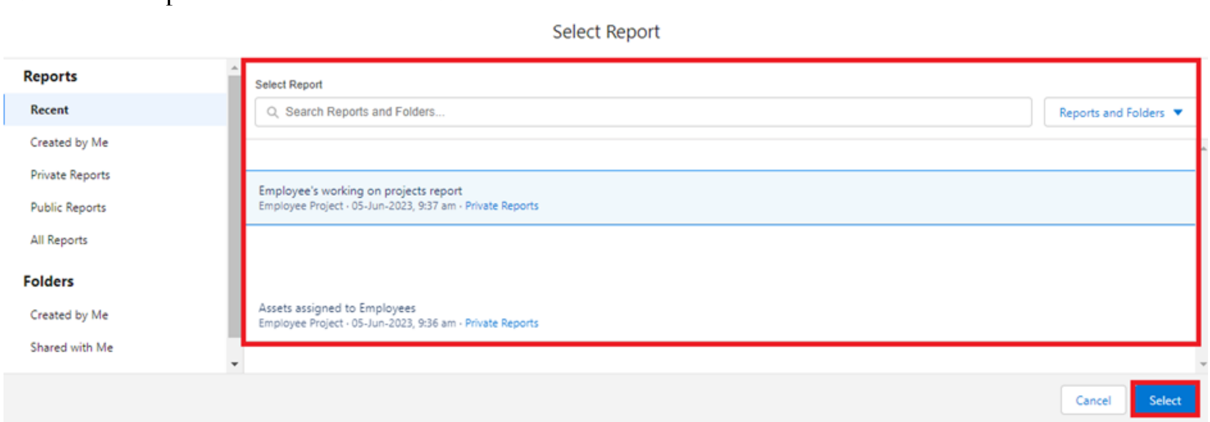
2. Give a Name and click on Create.



3. Select add component.



4. Select a Report and click on select.



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

Create another Dashboard as above.