

WORKFORCE ADMINISTRATION SOLUTION



Workforce Empowerment Hub

Developed by

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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>.

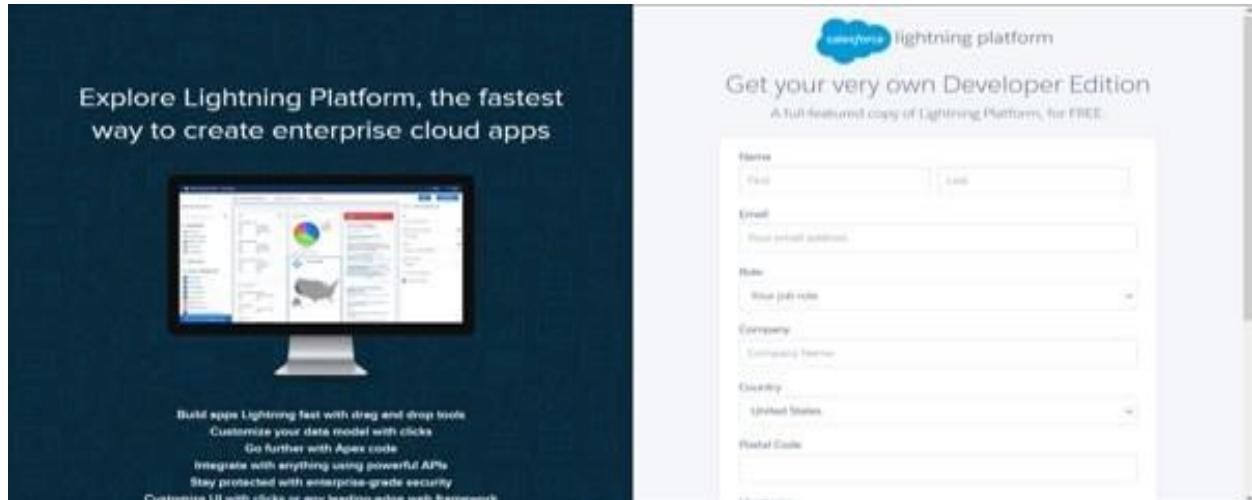
2. Click on "Sign Up."

3. Fill out the Sign-Up Form with the following details:

- a. First Name & Last Name
- b. Email
- c. Role: Developer
- d. Company: [Your College Name]
- e. Country: India
- f. Postal Code:[Your Pin Code]

g. Username: Create a 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

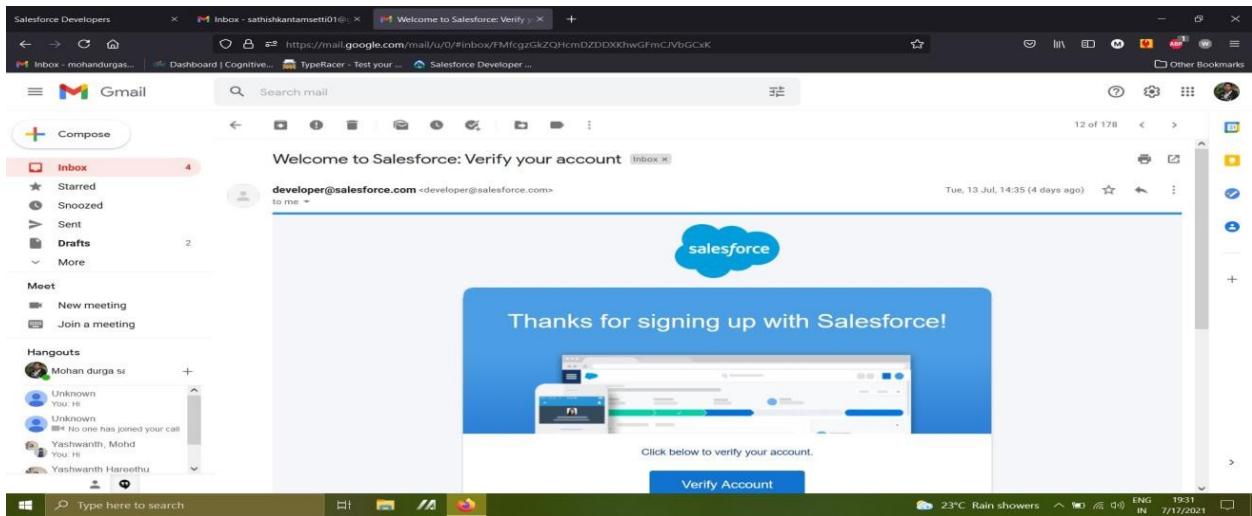


Step 2: Account Activation

1. Go to your email inbox that you used for signing up.

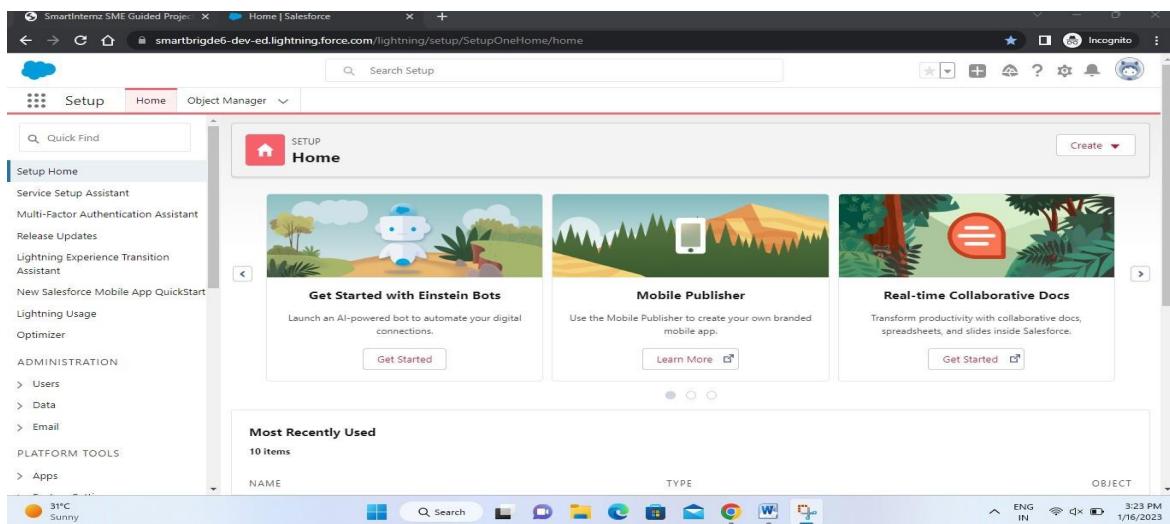
2. Find the verification email from Salesforce and click on the "Verify Account" link to activate your account.

- a. Note: The email might take 5-10 minutes to arrive.



Step 3: Login to Your Salesforce Account

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



2.Salesforce Objects

Salesforce objects are database 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 Sales.
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:
 - a. **Label:** Employee
 - b. **Plural Label:** Employees
 - c. **Record Name:** Employee
2. Check the following boxes:
 - a. **Allow Reports**

b. **Allow Search**

3. Click "Save" to create the object

Step 5: Create a Custom Tab for "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:
 - a. **Label:** Project
 - b. **Plural Label:** Projects
 - c. **Record Name:** Projects
2. **Check the following boxes:**
 - a. **Allow Reports**
 - b. **Allow Search**
3. **Click "Save"** to create the object.

Step 5: Create a Custom Tab for "Project"

1. **Click the "Home" tab** and enter "Tabs" in the Quick Find search bar.
2. **Select "Tabs"** from the search results.
3. Under **Custom 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 ObjectManager

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

Step 3: Create a Custom Object

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

Step 4: Create "Project Task" Object

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

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

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

4. For **Object**, select **Asset**.
5. For **Tab Style**, select any icon that represents your object.

2.4. Creating the Asset Object

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

Step 1: Access Setup

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

Step 2: Open ObjectManager

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

Step 3: Create a Custom Object

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

Step 4: Create "Project Task" Object

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

Step 5: Create a Custom Tab for "Asset"

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

2.5. Creating the "Asset Service" Object

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

Step 1: Access Setup

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

Step 2: Open Object Manager

- iii. 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 "Asset" Object

3. On the **Custom Object Definition** page, enter the following details:
 - a. **Label:** Asset Service
 - b. **Plural Label:** Asset Services
 - c. **Record Name:** Asset Service

4. **Check the following boxes:**
 - a. **Allow Reports**
 - b. **Allow Search**
5. **Click "Save"** to create the object.

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

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

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

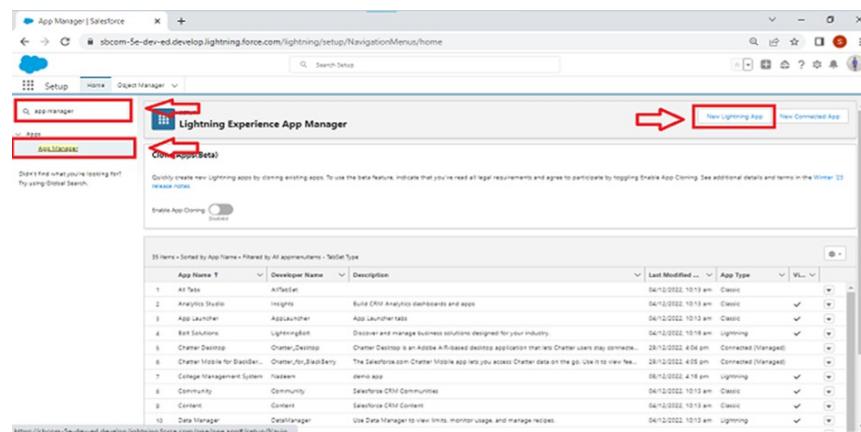
3.The Lightning App

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

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

Create a LightningApp

To create a lightningapp page:



1.

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

2. Fill the app name in app details and

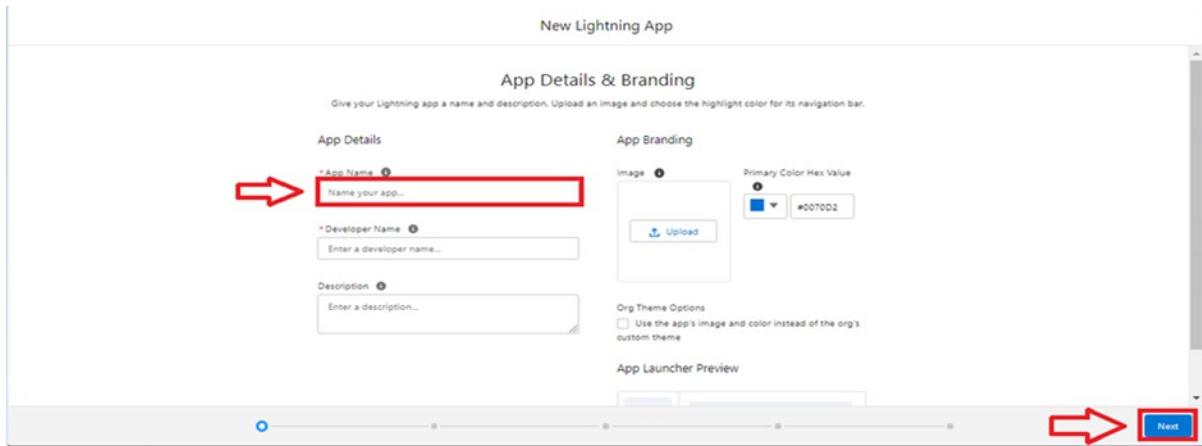
brandingas follow App Name :

Workforce Administrator Solution

Developer Name : this will auto
populated

Description : Give a meaningful description

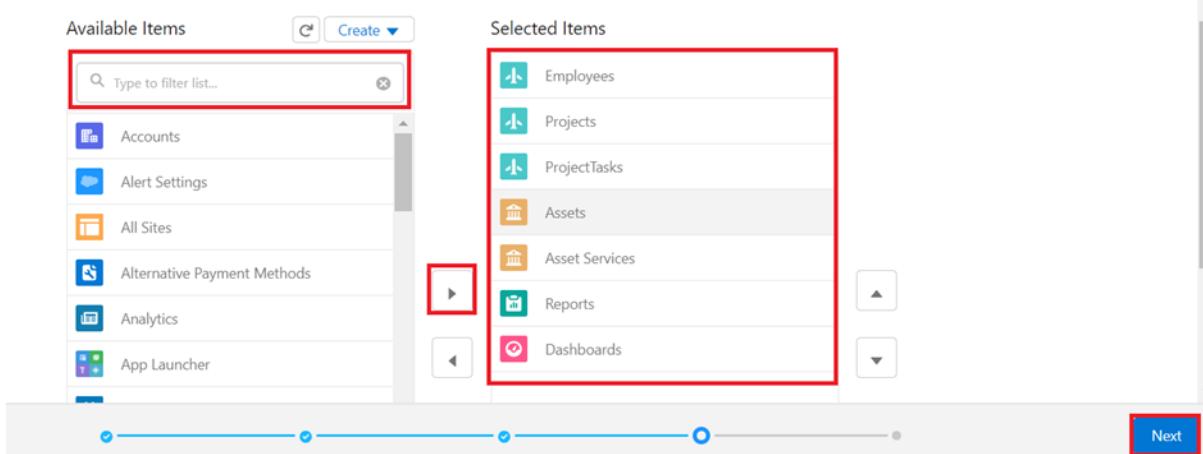
Image : optional (if you want to give any imageyou can otherwise not
mandatory) Primary color hex value : keep this default



3.

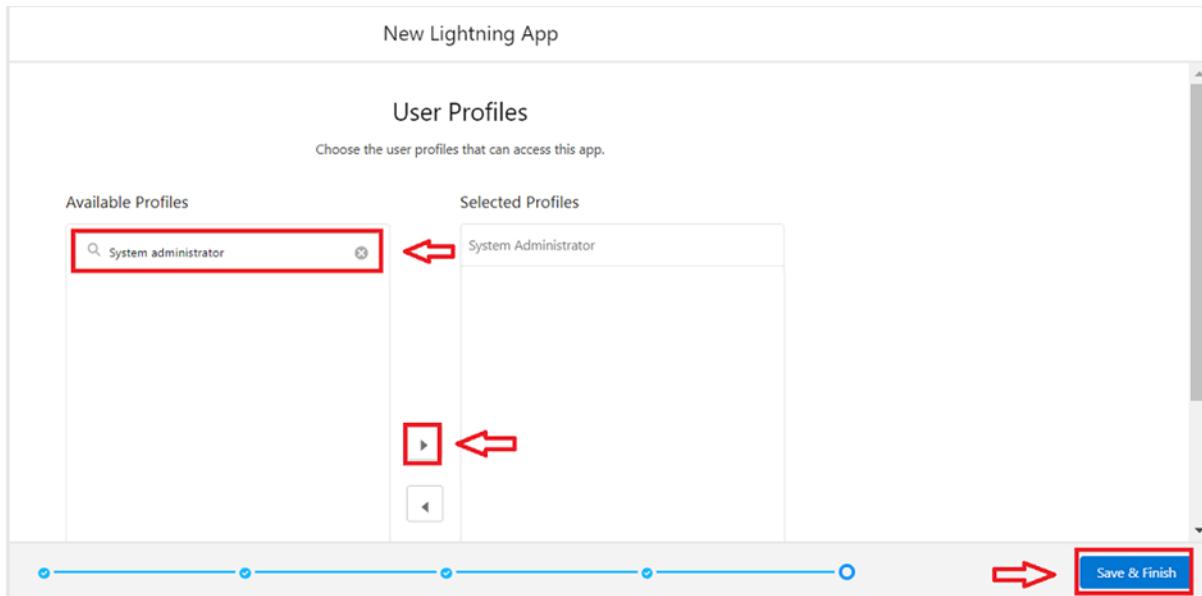
Then click Next --> (App option page) keep it as default--> Next --> (Utility Items)keep it as default --> Next.

4. To Add Navigation Items:



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

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



1.

To Add User Profiles:

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

4. Fields & Relationships

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

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

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

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

Custom Fields:

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

Creating Text Field in Employee Object

To create fields in an object:

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

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

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

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

3. Select Data type as “Text”.

- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters or attachments.

4. Click on Next

Step 2. Enter the details Step 2 of 4

Previous **Next** Cancel

Field Label	Employee Name	<input type="button" value="i"/>
Length	18	<input type="button" value="i"/>
Field Name	Employee_Name	<input type="button" value="i"/>
Description	<input type="text"/>	

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.

The screenshot shows a list of field types with their descriptions:

- Checkbox: Allows users to select a True (checked) or False (unchecked) value.
- 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.
- Date: Allows users to enter a date or pick a date from a popup calendar.
- 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.
- 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:

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.

The screenshot shows the 'Step 2. Choose output type' screen with the following details:

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

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

Step 3. Enter formula

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

Example: Fahrenheit = 1.8 * Celsius + 32 [More Examples...](#)

Simple Formula Advanced Formula

Insert Field Insert Operator

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

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

Description

Quick Tips

- Getting Started
- Operators & Functions

Functions

-- All Function Categories -- ▾

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

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

Field Label

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

Description

Help Text

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

Creating Self-Relationship Field in Employee Object

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

Step 2. Choose the related object

Step 2

Select the other object to which this object is related.

Related To 

Previous Next Cancel

Previous Next Cancel

4. Give Field Label as "Reports to" and click Next.

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

Creating Master-Detail Relationship between Employee & Asset Object

To Create a Master-Detail relationship

1. Go to the setup page --> click on object manager --> type object name(ProjectTask) in the quick find bar --> click on the object.

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

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

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

5. Give Field Label as "Employee Name" and click Next.

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

Creating Remaining Fields in Employee Object

Repeat the above steps to create many fields.

5. Setting OWD

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

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

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

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

Create OWD Setting

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

The screenshot shows the Salesforce Sharing Settings page. At the top, there's a navigation bar with 'Setup' selected. Below it, a search bar contains 'sharing settings'. On the left, a sidebar shows 'Security' and 'Sharing Settings' (which is highlighted with a red box). A message says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Sharing Settings' and contains a sub-section 'Default Sharing Settings'. It shows a table for 'Organization-Wide Defaults' with rows for various objects like Lead, Account and Contract, Contact, Order, Asset, and Opportunity. The 'Edit' button for this section is also highlighted with a red box. The table columns are 'Object', 'Default Internal Access', and 'Default External Access'.

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

3. Search for the Employee object.
4. Under default internal access and default external access change the options to "Private" and under grant access using hierarchies select the check box.

5. Click on save.

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

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

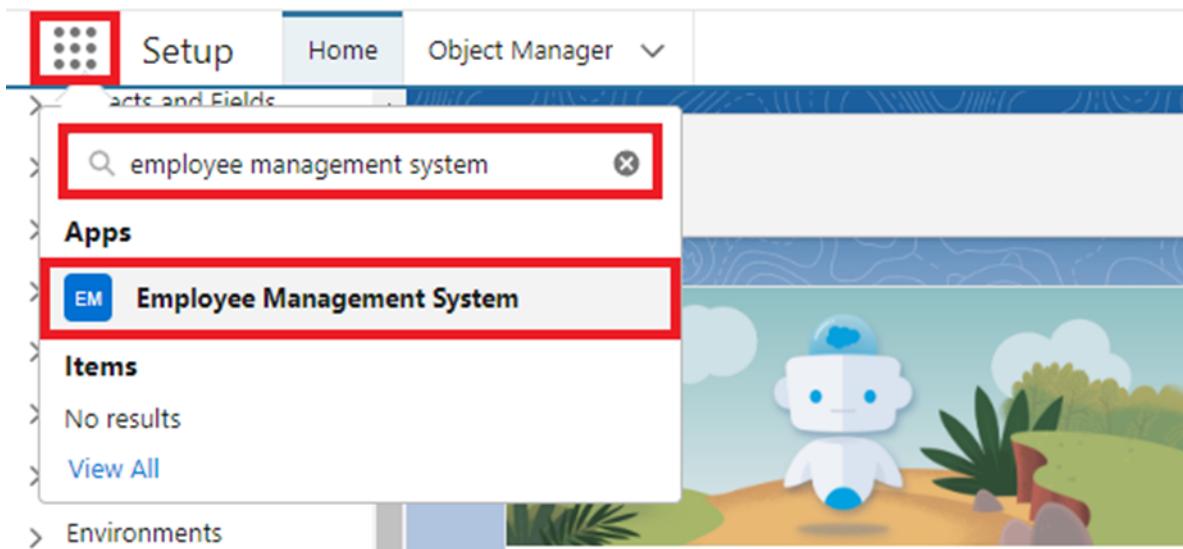
Set OWD as Private for Project and Asset Service objects.

6. User Adoption

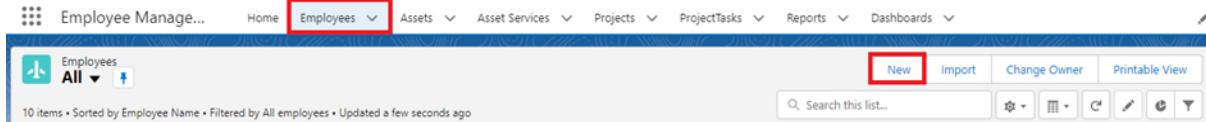
As a new Administrator, I perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuring data access, and much more.

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.

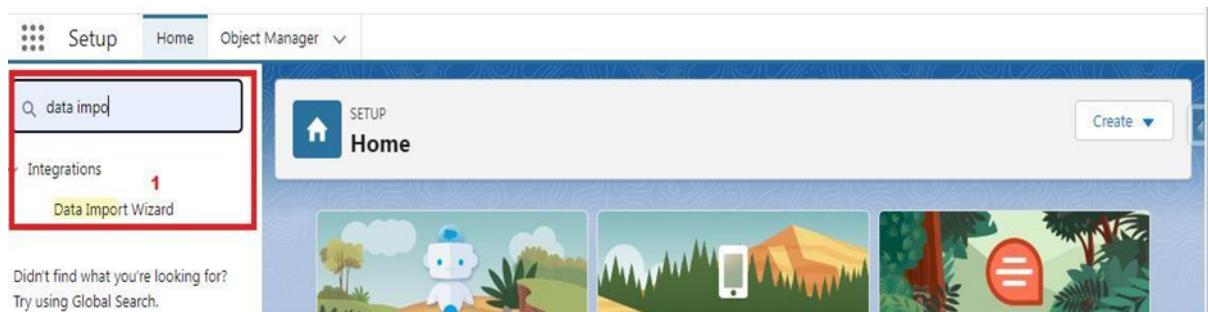
Data Import lets to upload data from external sources and combine it with data you collect via Analytics.

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

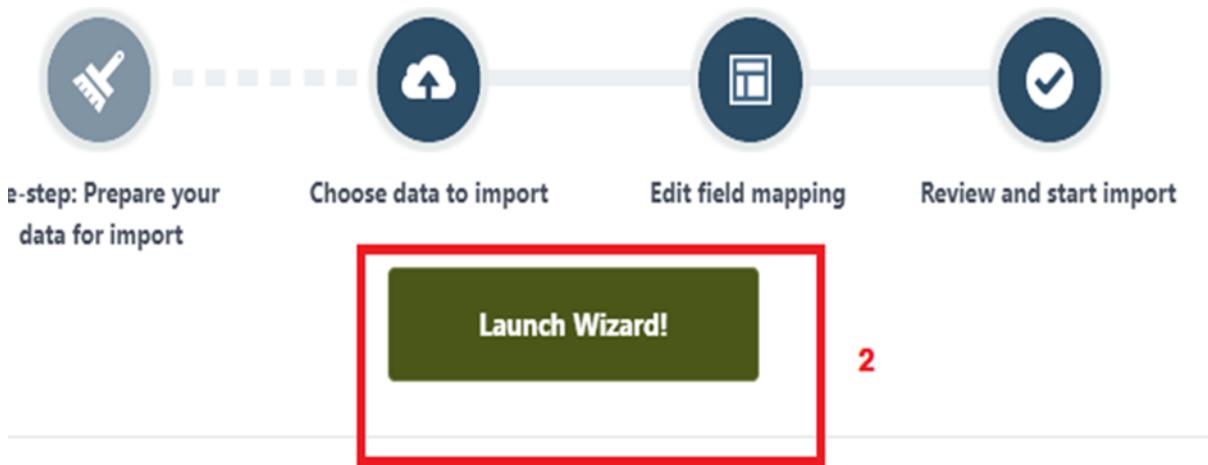
The Data Import Wizard is a Tool makes it easy to import data for many standard Salesforce objects, including accounts, contacts, leads, solutions, campaign members, and person accounts. You can also import data for custom objects.

Importing data using Data Wizard

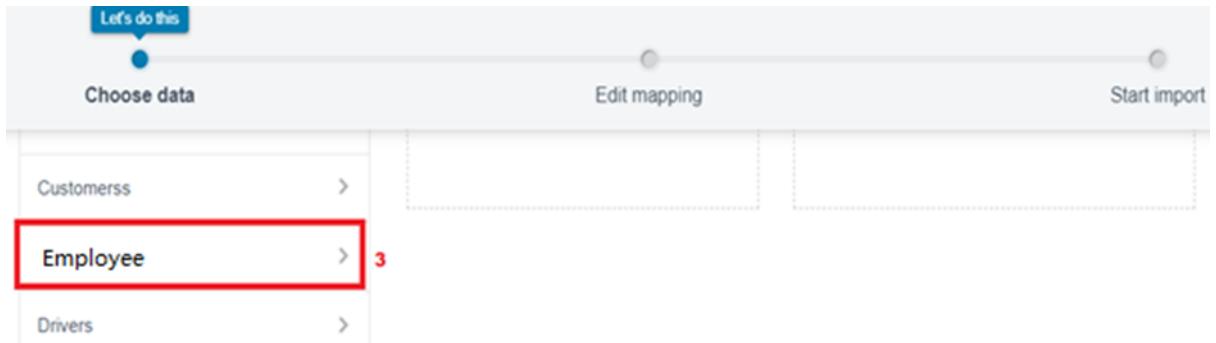
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



1. Click Launch Wizard!



Click the Custom Objects tab and select the Employee object.



1. Select Add new records.

Import your Data into Salesforce

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

What kind of data are you importing?		What do you want to do?	Where is your data located?
<input checked="" type="radio"/> Standard objects	<input type="radio"/> Custom objects	Add new records 4	Where is your data located? ?
Attendees		Update existing records	
Buyers		Add new and update existing records	

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

What kind of data are you importing?		What do you want to do?	Where is your data located?
<input checked="" type="radio"/> Standard objects	<input type="radio"/> Custom objects	Add new records ✓	Where is your data located? ?
Attendees		Match by: --None--	Drag CSV file here to upload
Buyers		Which User field in your file designates record owners? --None--	
Customers		Trigger workflow rules and processes? ?	<input type="checkbox"/> Trigger workflow rules and processes for new and updated records
Departments			

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

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Employee Name	Employee Name	Jackie Chan	James	Benjamin
Change	Date of Birth	Date of Birth	01/01/1993	27/02/1998	16/03/1999
Change	Gender	Gender	Male	Male	Male
Change	Qualification	Qualification	B.Tech	B.Tech	B.Com
Change	Address	Address			
Change	Experience	Experience	9	6	5
Change	Phone no	Phone no	7995434750	7995434751	7995434752

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

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

Your selections:	Your import will include:	Your import will not include:
<input checked="" type="checkbox"/> Employees ✓ <input checked="" type="checkbox"/> Add new records ✓ <input checked="" type="checkbox"/> Employee - Data - Employee - Data.csv ✓	Mapped fields 19	Unmapped fields 0

2. Click OK on the popup.

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

OK

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

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

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

8. Profiles

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

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

1. Contract Manager

2. Read Only

3. Marketing User

4. Solutions Manager

5. Standard User

6. System Administrator.

We cannot deleted standard ones

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

2. Custom Profiles:

Custom ones defined by us.

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

HR Profile

To create a new profile:

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

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	HR

Save **Cancel**

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

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

4. Scroll down and Click on Save.

Manager Profile

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

Create Employee Profile

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

9.Role

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

Creating HR Role

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

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. The left sidebar has a 'Users' section with 'Roles' highlighted by a red box. Below this are sections for Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'Understanding Roles' and contains a diagram of a sample role hierarchy. At the bottom right of the main content area is a red box around the 'Set Up Roles' button.

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

The screenshot shows the 'Your Organization's Role Hierarchy' page. At the top, there is a 'Collapse All' and 'Expand All' button, with 'Expand All' highlighted by a red box. The main area displays a hierarchical list of roles under 'Nick Enterprises'. The 'CEO' role has an 'Add Role' button next to it. The 'Manager' role has two children: 'On Site Emp' and 'Remote Emp', each with its own 'Add Role' button. Other roles like 'HR' and 'SVP' also have 'Add Role' buttons.

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

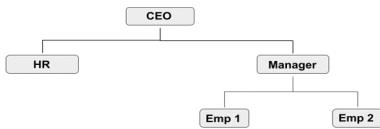
Role Edit
New Role

Role Edit

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

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

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



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

Creating more roles

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

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

10.Users

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

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

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

Create User

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

2. Fill in the fields

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

3. Save.

Creating another user

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

2. Fill in the fields

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

3. Save.

Creating more users

Create two more users as we created in above.

11. Page layouts

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

Creating a page layout for Employee object

To Create a Page layout:

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

The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'Employee' typed in. Below it, a table lists one item: 'Employee' (Label), 'Employee__c' (API Name), 'Custom Object' (Type). The 'Edit' button for this item is highlighted with a red box. The 'Setup' tab is selected in the top navigation bar.

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

The screenshot shows the 'Page Layouts' section of the Employee object's detail page. The 'Page Layouts' tab is selected in the sidebar. A 'New' button is highlighted with a red box. The table lists one item: 'Employee Layout' (Page Layout Name), 'Nick' (Created By), and 'Nick' (Modified By).

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

Create New Page Layout

The screenshot shows the 'Create New Page Layout' dialog. It includes a note about cloning, a dropdown for 'Existing Page Layout' set to 'Employee Layout', a text input for 'Page Layout Name' containing 'On Site Employee Layout', and a 'Save' button highlighted with a red box.

1. Drag and drop the Section from the highlight panel below the Information and name it as "Personal Information" and click Ok.
2. Drag Date of Birth, Address and Age fields from Employee Information to Personal Information section.

- Similarly perform the above step to create “Allowances” and add allowances fields in it as shown below.

Creating another page layout

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

The screenshot shows the Salesforce Page Layout Editor interface. At the top, there are buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. On the left, a sidebar titled 'Fields' lists: Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. The main area displays a table of fields:

	Cab Allowance	Email	Food Allowance Am...	Last Modified By	Mode of Work	Reports to
Section	Cab Allowance	Email	Food Allowance Am...	Last Modified By	Mode of Work	Reports to
Blank Space	Cab Allowance Amount	Employee ID	Food Allowances	LinkedIn Profile	Owner	Wifi Allowance Am...
Address	Created By	Employee Name	Gender	Login Time	Phone no	Wifi Allowances
Age	Date of Birth	Experience	Joining date	Logout Time	Qualification	

Below this table, there are three sections:

- Information (Header visible on edit only)**: Contains fields like Employee ID, Employee Name, Gender, Experience, Email, Joining date, and LinkedIn Profile, each with sample values.
- Personal Information**: Contains Date of Birth and Address, both with sample values.
- Allowances**: Contains two checkboxes: Cab Allowance (checked) and Food Allowances (checked). To the right, there are two input fields: Cab Allowance Amount (₹123.45) and Food Allowance Amount (₹123.45).

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

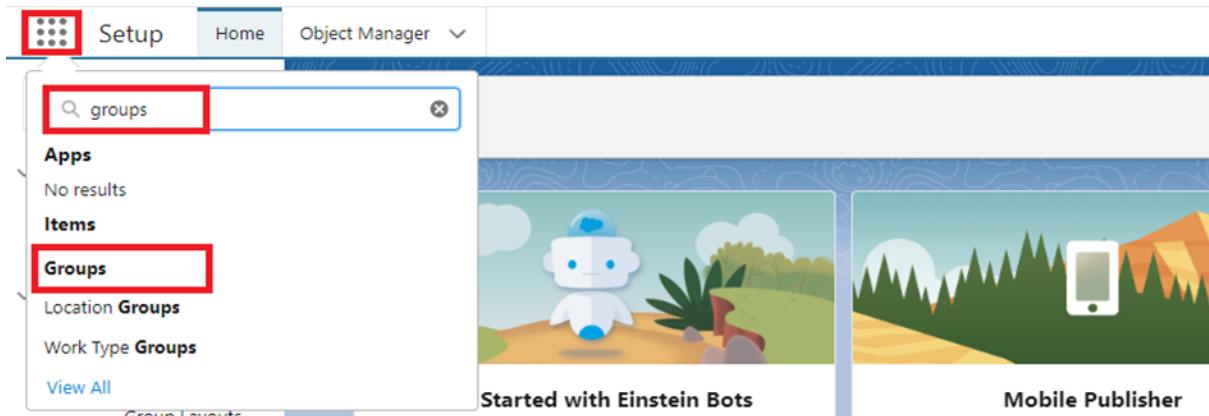
12.Chatter Group

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.

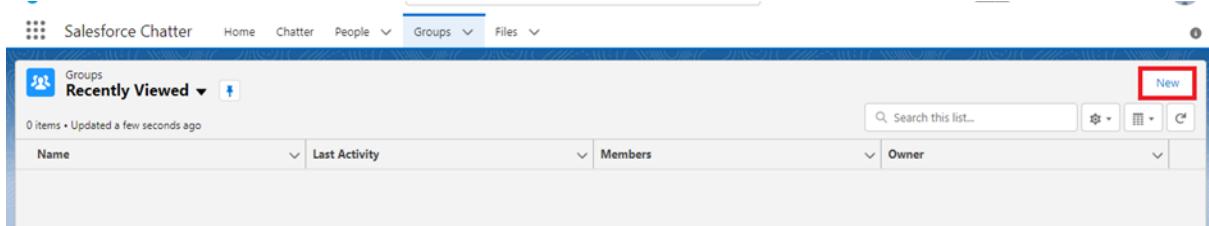
Creating a chatter group for your organization.

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

Chatter Home Chatter

My Viewed ▾ 8 minutes ago

New Group

Name: Internal Discussion

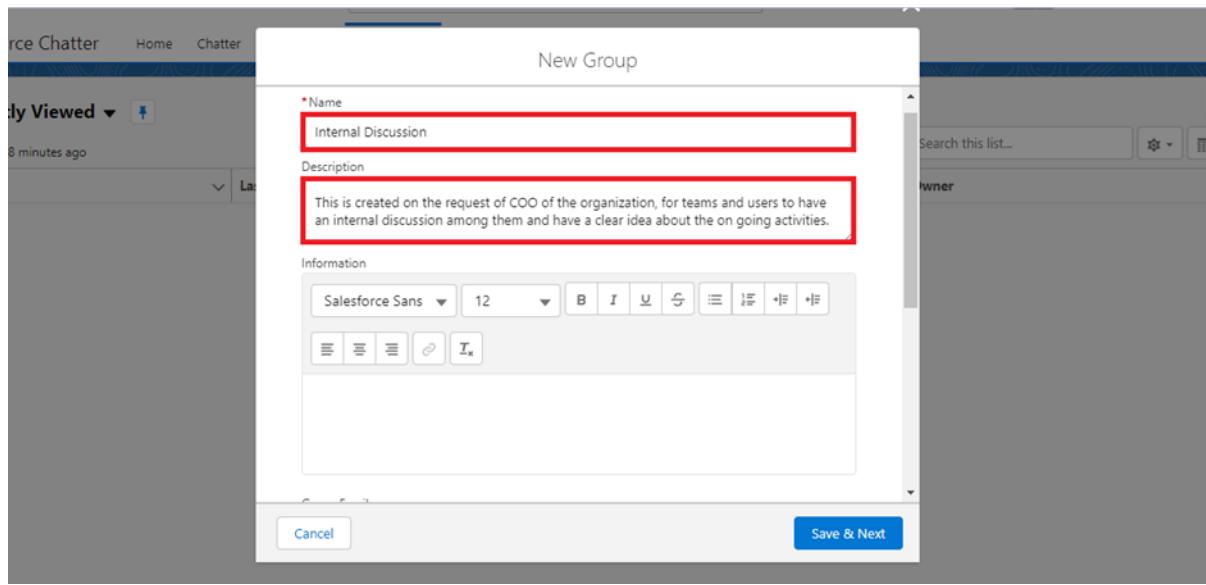
Description: This is created on the request of COO of the organization, for teams and users to have an internal discussion among them and have a clear idea about the on going activities.

Information:

Salesforce Sans 12 B I U

Cancel Save & Next

Search this list... Owner



Chatter Home Chatter

ewed ▾ 8 ago

New Group

Group Email: Employee Project

Owner: Employee Project

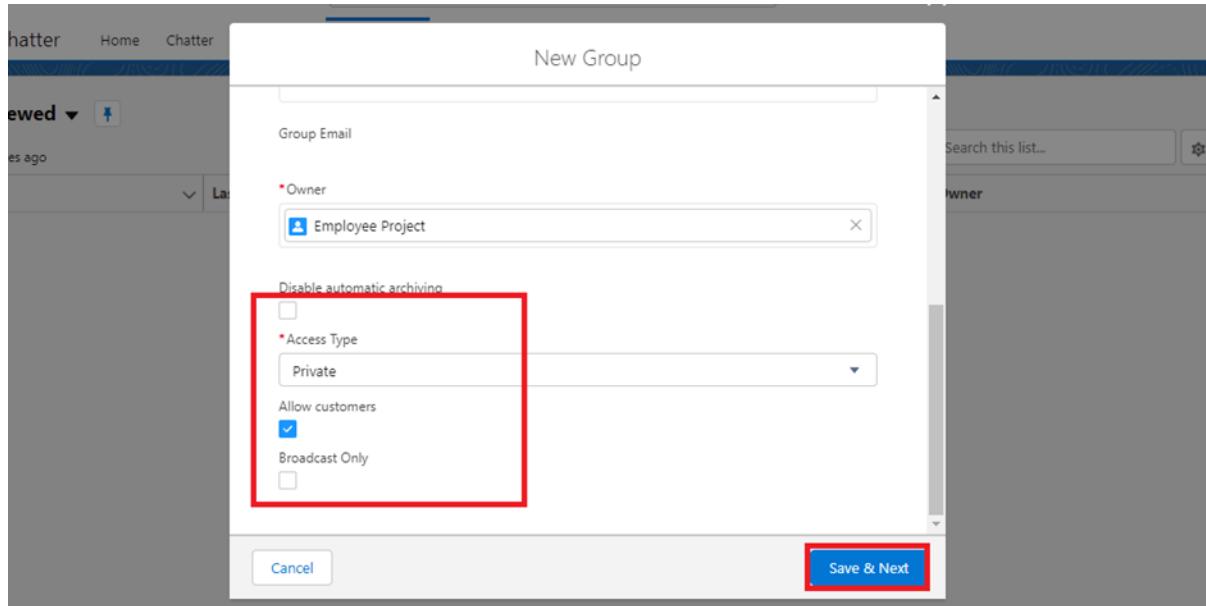
Disable automatic archiving:

Access Type: Private

Allow customers: Broadcast Only:

Cancel Save & Next

Search this list... Owner



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

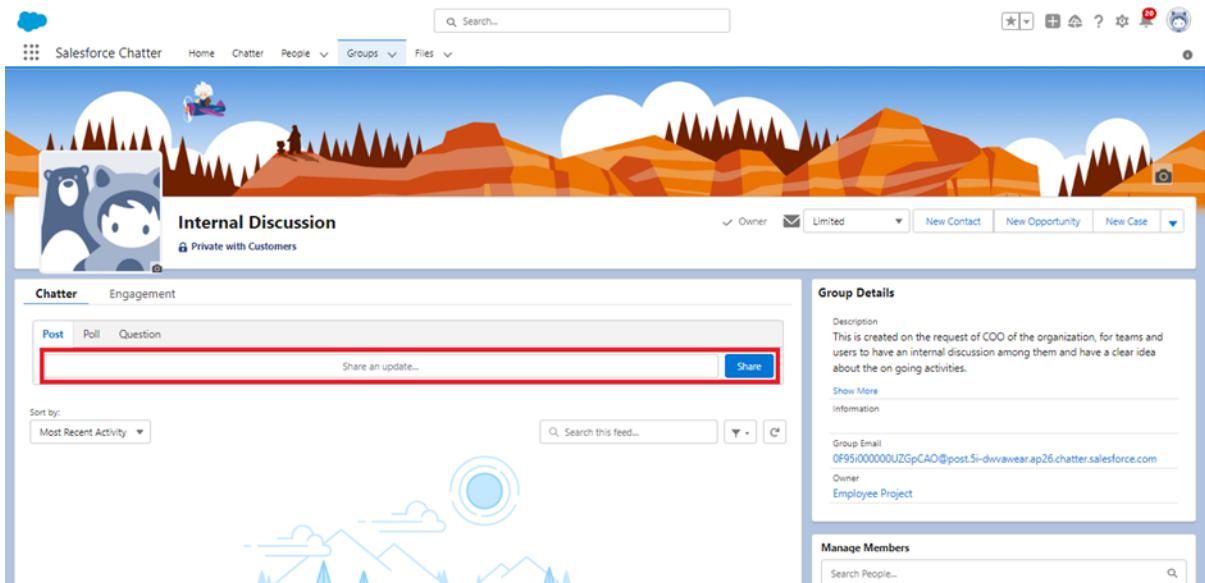
Manage Members

Search People...

	Jason Mikaelson	X	Member ▾
	Elijah Mikaelson	X	Member ▾
	Kol Mikaelson	X	Member ▾
	Niklaus Mikaelson	+ Add	

Done

1. Click Done.



2. This is how your group interface looks like.
3. 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.
4. Click Share.

Note: You can like or comment on this post.

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

13. Record Types

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

Creating On Site Employee Record Type

To create a Record Type:

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

The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for Setup, Home, and Object Manager, with Object Manager selected. A search bar at the top right contains the text "Employee". Below the search bar, there is a "Schema Builder" button and a "Create" button. The main area displays a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. One row is visible for the "Employee" object, which has an API name of "Employee__c", a type of "Custom Object", and was last modified on "01/06/2023". To the right of the table is an "Edit" button and a "Delete" button, both highlighted with red boxes.

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

The screenshot shows the "Record Types" page for the "Employee" object. The left sidebar has links for Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The "Record Types" link is highlighted with a red box. The main content area shows a table titled "Record Types" with columns: RECORD TYPE LABEL, DESCRIPTION, ACTIVE, and MODIFIED BY. There are no items displayed in the table. At the top right of the content area, there are "Quick Find" and "New" buttons, with the "New" button highlighted with a red box. Below the table, it says "No items to display."

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

Step 1. Enter the details

Step 1 of 2

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

Record Type

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

 = Required Information

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

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

4. Uncheck for “Make Available”.

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

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

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

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

Employee Record Type On Site Employee
 Record Type Name On_Site_Employee
 Description

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

Apply one layout to all profiles

 Apply a different layout for each profile

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

Previous Save & New Cancel

7. click Save.

Creating "Remote Employee" Record Type

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

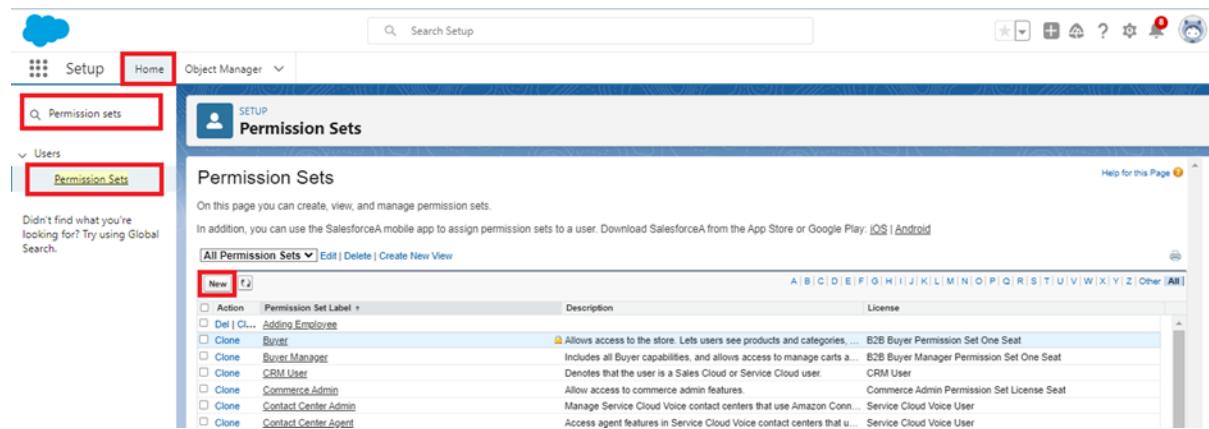
14.Permission sets

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

Creating a permission set

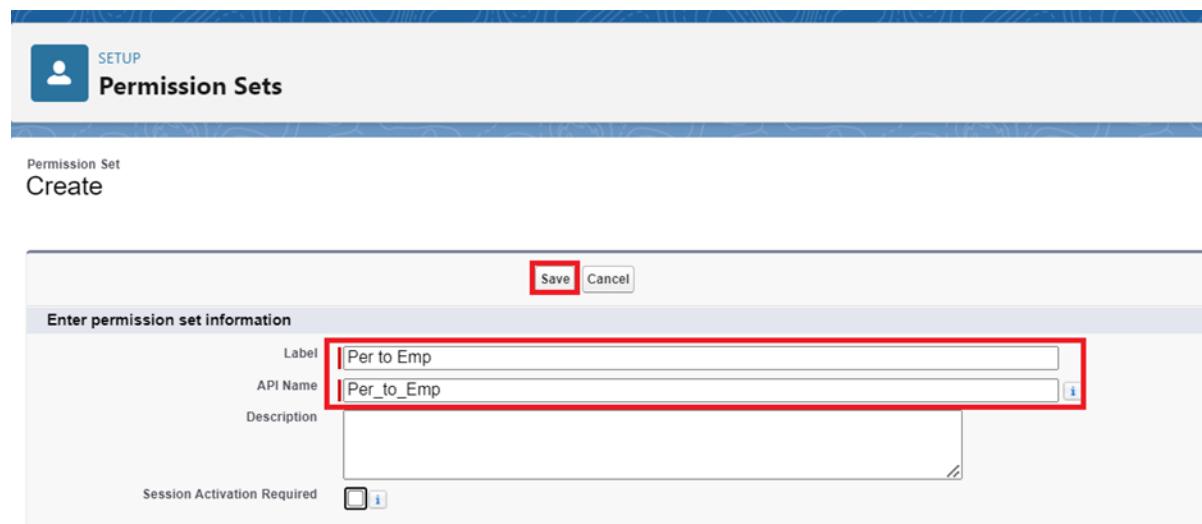
To Create a Permission Set:

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



The screenshot shows the Salesforce Setup interface. The top navigation bar has 'Setup' selected. Below it, the main menu shows 'Permission sets' highlighted. The page title is 'Permission Sets'. A sub-header says 'Permission Sets' with a note: 'On this page you can create, view, and manage permission sets.' Below this is a table listing various permission sets like 'Buyer', 'Buyer Manager', etc., each with a 'Clone' button and a brief description. At the bottom of the table is a navigation bar with letters A-Z and 'Other'. A red box highlights the 'New' button at the top left of the table.

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



The screenshot shows the 'Create Permission Set' dialog. It has a header with 'Permission Set' and 'Create'. Below it is a form with fields: 'Label' (containing 'Per to Emp'), 'API Name' (containing 'Per_to_Emp'), and 'Description' (empty). At the top right are 'Save' and 'Cancel' buttons. A red box highlights the 'Label' and 'API Name' fields.

3. Under Apps Select object settings.

Apps

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

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

Permission Set
Adding Employee

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

Permission Set Overview > Object Settings Employees

Employees Save Cancel

Tab Settings

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

Employee: Record Type Assignments

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

Object Permissions

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

5. Click on Save.

6. After saving the permission click on the Manage assignment

The screenshot shows the Salesforce 'Permission Sets' interface. At the top, there's a blue header bar with the word 'SETUP'. Below it, a sidebar on the left has a user icon and the title 'Permission Sets'. The main content area is titled 'Permission Set Adding Employee'. At the top of this section, there's a toolbar with several buttons: 'Find Settings...', 'Clone', 'Edit Properties', and 'Manage Assignments'. The 'Manage Assignments' button is highlighted with a red box. Below the toolbar, the URL is shown as 'Permission Set Overview > Object Settings Employees'. Underneath, there's a section titled 'Employees' with an 'Edit' button. A 'Tab Settings' section follows, containing a table with two columns: 'Available' and 'Visible'. The 'Available' column has a checkbox checked, and the 'Visible' column has a checkbox checked and a small blue edit icon. The entire screenshot is framed by a light blue border.

7. Now click on the Manage Assignment.

This screenshot shows the 'Current Assignments' page for the 'Adding Employee' permission set. At the top, there's a breadcrumb trail: '... > SETUP > PERMISSION SET 'ADDING EMPLOYEE''. The main title is 'Adding Employee'. Below the title, there's a section titled 'Current Assignments' with a table. The table has two columns: one with a cloud icon and another with a circular icon. To the right of the table are three buttons: a pencil icon, a trash icon, and a red-bordered 'Add Assignment' button. The entire screenshot is framed by a light blue border.

8. Click on Add Assignment.

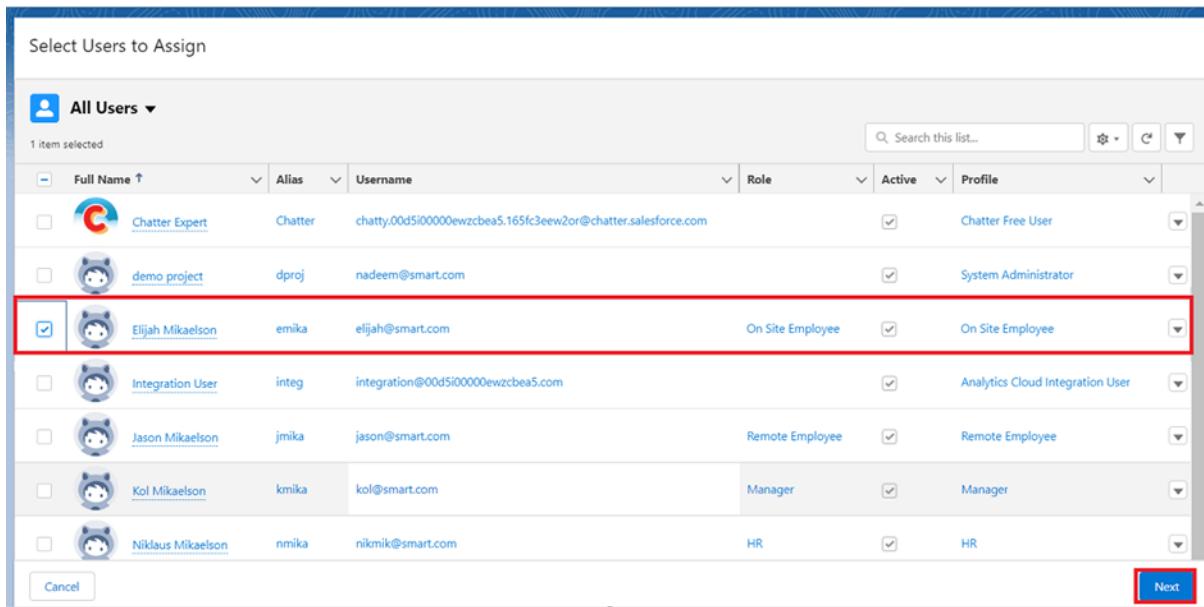
Select Users to Assign

All Users

1 item selected

Full Name ↑	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty.00d5i00000ewzcbea5.165fc3eew2or@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	
demo project	dproj	nadeem@smart.com	System Administrator	<input checked="" type="checkbox"/>	
Elijah Mikaelson	emika	elijah@smart.com	On Site Employee	<input checked="" type="checkbox"/>	On Site Employee
Integration User	integ	integration@00d5i00000ewzcbea5.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	
Jason Mikaelson	jmika	jason@smart.com	Remote Employee	<input checked="" type="checkbox"/>	Remote Employee
Kol Mikaelson	kmika	kol@smart.com	Manager	<input checked="" type="checkbox"/>	Manager
Niklaus Mikaelson	nmika	nikmik@smart.com	HR	<input checked="" type="checkbox"/>	HR

Cancel Next



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

10. Click on Assign

11. Click on Done.

15. Reports

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

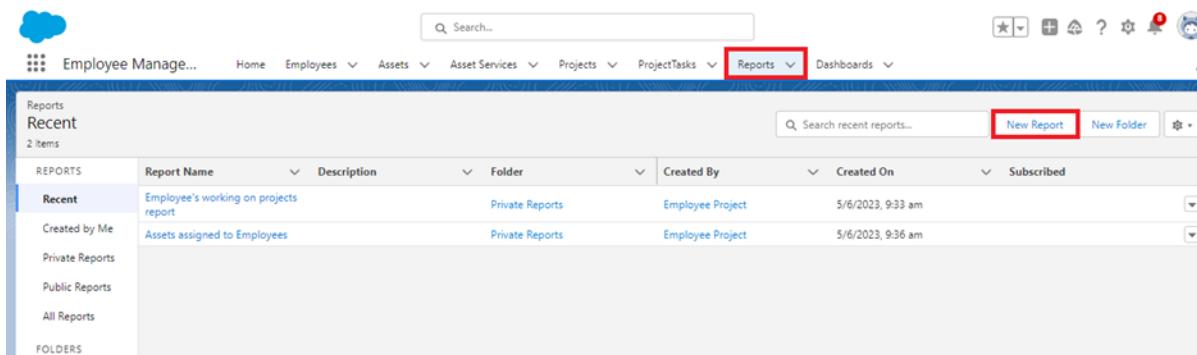
Types of Reports in Salesforce

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

Create Report

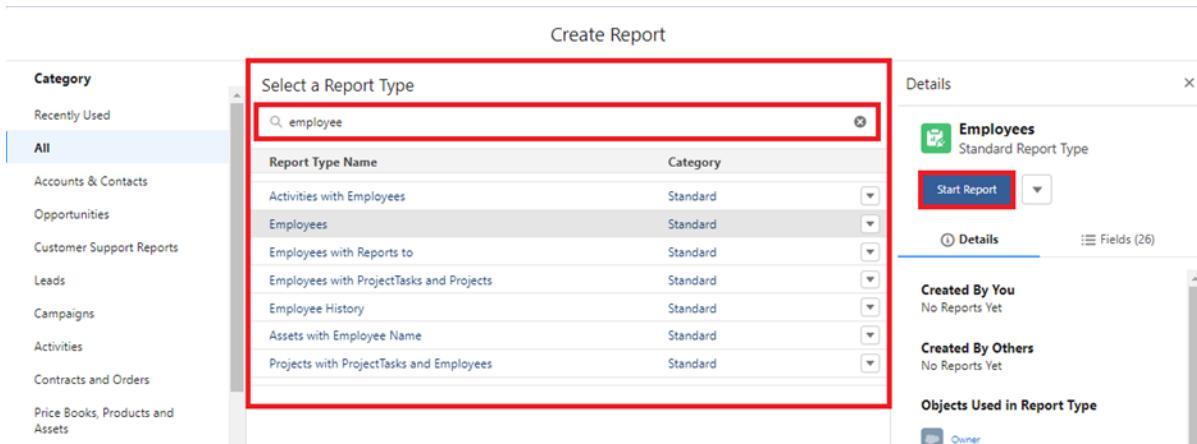
To Create a Report:

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



The screenshot shows the Salesforce Reports page. At the top, there's a navigation bar with icons and links for Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports (which is currently selected and highlighted with a red box), and Dashboards. Below the navigation is a search bar labeled 'Search...'. On the left, there's a sidebar with 'Reports' and 'Recent' sections, and buttons for 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. The main area is a table titled 'RECENT' showing two report entries: 'Employee's working on projects report' and 'Assets assigned to Employees'. To the right of the table is another search bar labeled 'Search recent reports...' and a 'New Report' button, which is also highlighted with a red box. Below the table, there's a section labeled 'FOLDERS'.

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



The screenshot shows the 'Create Report' dialog. On the left, there's a sidebar with 'Category' sections like 'Recently Used', 'All', 'Accounts & Contacts', 'Opportunities', 'Customer Support Reports', 'Leads', 'Campaigns', 'Activities', 'Contracts and Orders', and 'Price Books, Products and Assets'. In the center, there's a search bar labeled 'Select a Report Type' with the text 'employee' entered. Below the search bar is a table titled 'Report Type Name' with several rows: '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'. To the right of the search panel is a 'Details' section for the 'Employees' report type. It includes a thumbnail for 'Employees', the text 'Standard Report Type', a 'Start Report' button (which is highlighted with a red box), and sections for 'Created By You' (with 'No Reports Yet') and 'Created By Others' (with 'No Reports Yet'). At the bottom, there's a section for 'Objects Used in Report Type' with a 'Owner' link.

4. Customize your report

--> Add fields from left pane as shown below

Employee Employee Name	Employee ID	Reports to	Login Time	Logout Time	Mode of Work	LinkedIn Profile
Employee	a00500000HqY0	-	-	-	-	http://(https://)
Empl for Juncation test	a00500000HqY1	-	8:00 am	9:00 pm	-	http://(https://)

5. Save or run it.

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

Create 2 more Report

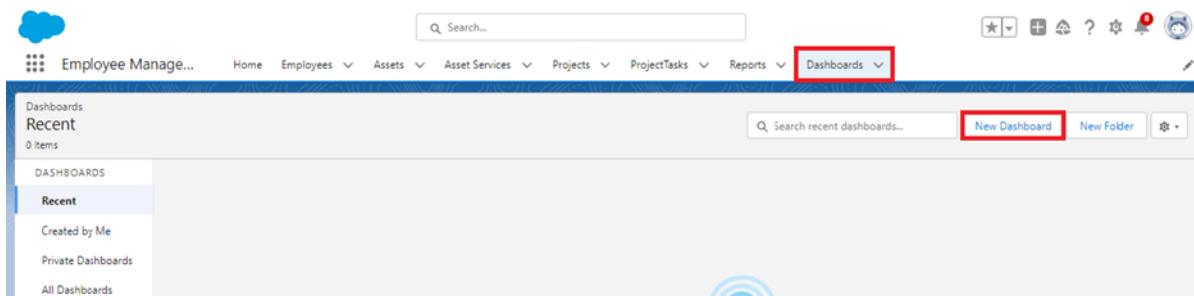
1. Create a report with report type: "Employees with ProjectTasks and Projects".
2. Create a report with report type: "Employees with Assets".

16.Dashboards

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

To Create a Dashboard

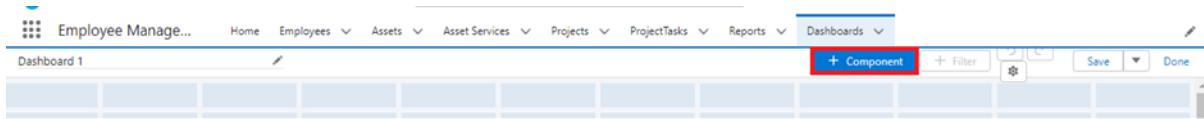
1. Go to the app --> click on the Dashboards tabs.



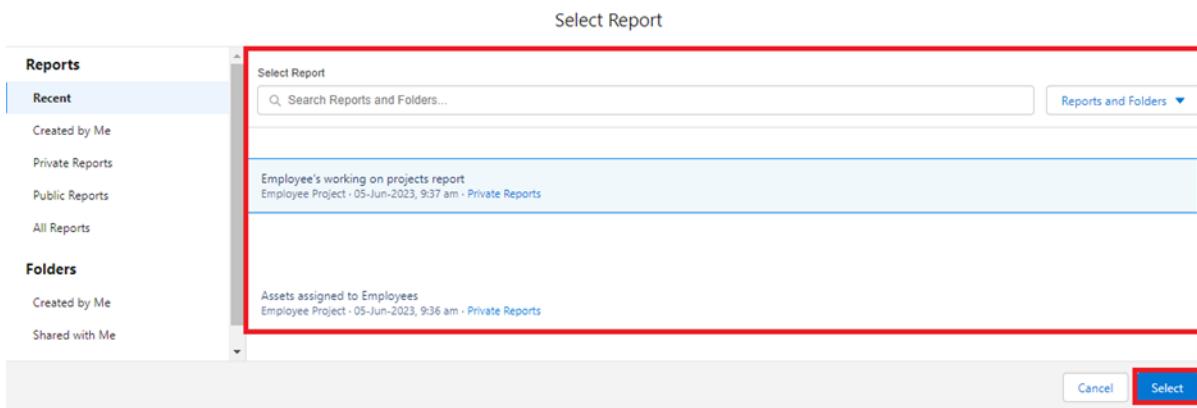
2. Give a Name and click on Create.

A screenshot of the 'New Dashboard' creation dialog box. The title bar says 'New Dashboard'. There are three input fields: 'Name' (containing 'Dashboard 1'), 'Description' (empty), and 'Folder' (containing 'Private Dashboards'). To the right of the 'Folder' field is a 'Select Folder' button. At the bottom right of the dialog box is a 'Create' button, which is highlighted with a red box.

3. Select add component.



4. Select a Report and click on select.



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

Create another Dashboard as above.