

# **Workforce Administration Solution (Admin)\_**

**By**

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## **Workforce Administration Solution (Admin)**

### **Project Description:**

Workforce Administration Solution is a software application or platform designed to streamline and automate various aspects of employee's working on projects and Asset Assignment processes within an organization. It serves as a centralized system for managing employee data, number of projects an employee is working on, tracking employee performance, and keeping record for the assets which they are assigned to.

1. Real Time Salesforce Project
2. Data Modelling
3. Creating an Application
4. User Interface Customization
5. Importing bulk amounts of data
6. Security in Salesforce
7. Group Collaboration
8. Reports & Dashboards

## **INTRODUCTION**

The Smart Bridge organization is moving to the cloud-based Salesforce platform in order to enhance performance, simplify system administration, and secure data. The business uses Salesforce to store confidential information securely using encryption and backups, and automated data replication improves disaster recovery. Performance is optimized for quick and dependable data access thanks to the scalable cloud resources. By doing this, administrative complexity is decreased, and system administrators are free to concentrate on higher-value work, which increases output and improves overall operational efficiency.

## **OBJECTIVE**

A workforce administration solution aims to achieve the following goals:

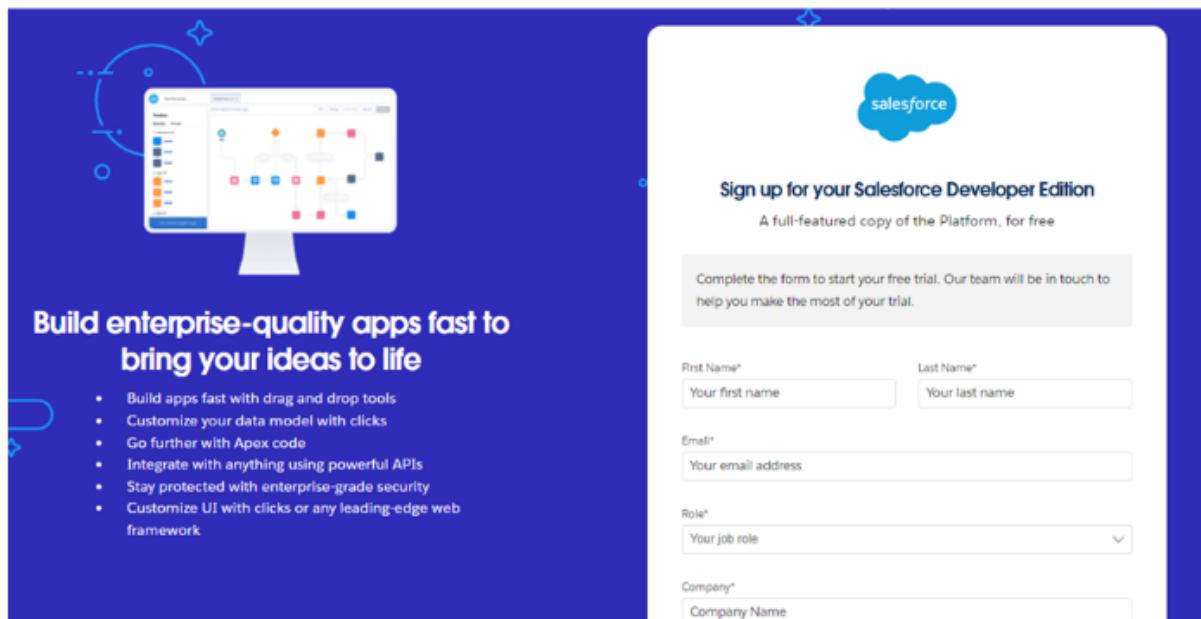
- Centralized Employee Data Management: Establish a single, integrated system for handling employee data.
- Project tracking: Keep tabs on how many projects each worker is engaged in.
- Employee performance is monitored and assessed through performance monitoring.
- Asset Assignment Management: Keep track of and keep an eye on the resources allocated to your staff.
- Process Automation: Simplify and automate procedures related to asset and personnel management.
- Increased Efficiency: Cut down on manual labor to increase operational efficiency.
- Data Accessibility: To improve decision-making, make sure that personnel and projectrelated data is easily accessi

## Implementation Details

The first step to create this project is "Creation of a Salesforce Developer Account"

**Activity 1: Creating Developer Account** 1. Visit the signup page at <https://developer.salesforce.com> .

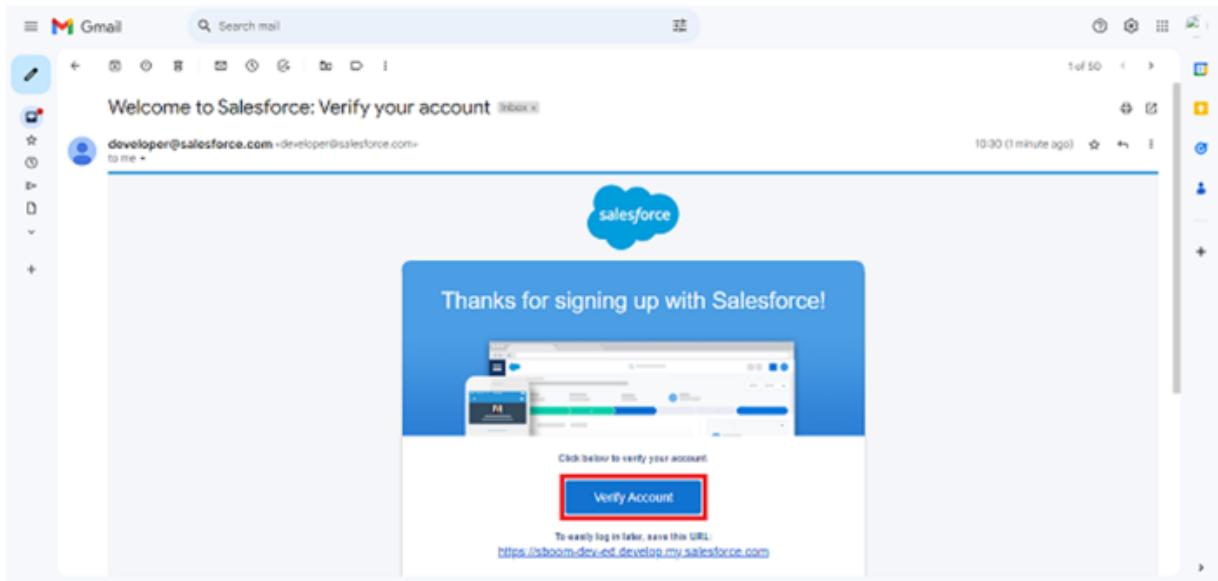
2. Fill out the following information on the sign-up form .



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

## Activity 2: Account Activation

1. Access the inbox using the email address you used to register. To activate your account, click the "Verify Account" button. It could take five to ten minutes to send the email.



2. Select "Verify Account."
3. Enter your password, respond to the security question, and then select "Change Password."
4. Then you will redirect to your salesforce setup page.

## **TASK 1**

### **Object :**

What Constitutes an Object? Database tables known as Salesforce objects let you store information unique to a company. Which kinds of items are there in Salesforce? There are two kinds of Salesforce objects: 1. Standard Objects: Salesforce.com provides users, contracts, reports, dashboards, and other types of objects as standard objects. 2. Custom Objects: Objects generated by users are known as custom objects. They provide information that is special to them and vital to their business. They serve as the center of every application and offer a framework for data sharing.

### **Activity 1:**

Create Employee Object To create an object: 1. From the setup page --> Click on Object Manager --> Click on Create --> Click on Custom Object. 2. Click on Allow reports, 3. Allow search --> Save.

### **Activity 2:**

Create Project Object Having comprehensive data on the organization's ongoing and finished projects is the goal of developing a project object. To create an object: 1. From the setup page --> Click on Object Manager --> Click on Create --> Click on 2. Click on Allow reports, 3. Allow search --> Save Activity 3: Create 3 more objects with label names as ProjectTask, Asset, Asset Service. By following activity-2 steps, created 3 more objects.

## Output of Task 1:

### Employee Object output:

The screenshot shows the Salesforce Setup interface for the Employee object. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main pane displays the 'Details' tab for the Employee object. It includes fields for API Name (Employee\_\_c), Singular Label (Employee), Plural Label (Employees), and several status and history settings. The URL in the browser bar is <https://lakshminaraincollegeoftech8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IWU000001DcIV/Details/view>.

### Project Object output:

The screenshot shows the Salesforce Setup interface for the Project object. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main pane displays the 'Details' tab for the Project object. It includes fields for API Name (Project\_\_c), Singular Label (Project), Plural Label (Projects), and several status and history settings. The URL in the browser bar is <https://lakshminaraincollegeoftech8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IWU000001Dcen/Details/view>.

## ProjectTask Objects:

The screenshot shows the Salesforce Object Manager interface for the 'ProjectTask' object. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Details' and shows the following configuration for the 'ProjectTask' object:

Description	
API Name	ProjectTask__c
Custom	✓
Singular Label	ProjectTask
Plural Label	ProjectTasks
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

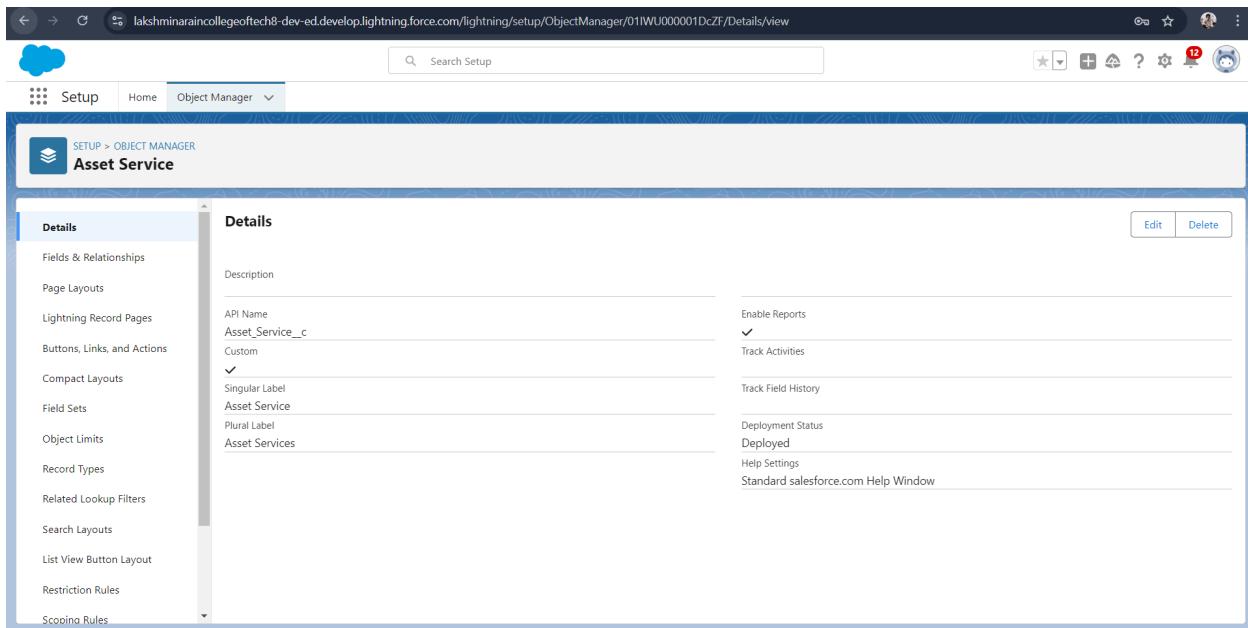
At the bottom of the page, the URL is displayed: <https://lakshminaraincollegeoftech8-dev-ed.lightning.force.com/one/app#/setup/ObjectManager/01IWU000001Dcmr/PageLayouts/view>

## Asset object :

The screenshot shows the Salesforce Object Manager interface for the 'Asset' object. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Details' and shows the following configuration for the 'Asset' object:

Description	
API Name	Asset__c
Custom	✓
Singular Label	Asset
Plural Label	Assets
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

## Asset Service Object :



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "SETUP > OBJECT MANAGER" followed by "Asset Service". On the left, a sidebar lists various object settings: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main "Details" tab is selected, displaying the following information:

Setting	Value
Description	
API Name	Asset_Service__c
Custom	✓
Singular Label	Asset Service
Plural Label	Asset Services
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for "Edit" and "Delete" are located at the top right of the details section.

## Task 2:

**Tabs:** A tab functions similarly to a user interface and is utilized for creating records for objects as well as viewing the records within those objects.

### Tab Types:

1. Individual Tabs Salesforce.com's custom object tabs serve as the user interface for custom apps that you create. They have the same appearance and functionality as common salesforce.com tabs like contacts, opportunities, and accounts
2. Online Tabs Custom tabs known as "Web Tabs" are used to show web apps or material embedded within the Salesforce.com window. With web tabs, users can rapidly access applications and content they regularly use without ever leaving the salesforce.com application.

## **Activity 1:** Creating a Custom Tab (Employee) To create a Tab:(Employee)

- 1.Go to setup page --> type Tabs in the Quick Find bar --> click on tabs --> New (under custom object tab )
- 2.Select Object(Employee) --> Select any tab style --> Next (Add to profiles page) keep it as default --> Next (Add to Custom App) keep it as default --> Save.

## **Activity 2:** Creating a Custom Tab (Project)

- 1.Go to setup page --> type Tabs in Quick Find bar --> click on tabs --> New (under custom object tab)
- 2.lect Object(Project) --> Select the tab style ?--> Next (Add to profiles page) keep it as default --> Next (Add to Custom App) keep it as default --> Save. Output Activity
- 3:Creating tabs for remaining objects Now create tabs for Project Task, Asset, Asset Service objects. Project Task: Output: Asset: Output: Asset service:

## **Output:**

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** The URL is <https://lakshminaraincollegeoftech8-dev-ed-develop.lightning.force.com/lightning/setup/CustomTabs/home>.
- Left Sidebar:** Includes links for Setup, Home, Object Manager, and a search bar labeled "Search Setup".
- Current Page:** "SETUP Tabs" under "Custom Tabs".
- Section:** "Custom Tabs".
- Description:** "You can create new custom tabs to extend Salesforce functionality or to build new application functionality."
- Table:** "Custom Object Tabs" showing the following data:

Action	Label	Tab Style	Description
Edit   Del	Assets	Balls	
Edit   Del	Asset Services	Bank	
Edit   Del	Employees	Airplane	
Edit   Del	Projects	Alarm clock	
Edit   Del	ProjectTasks	Apple	

- Section:** "Web Tabs".
- Description:** "No Web Tabs have been defined."
- Section:** "Visualforce Tabs".
- Description:** "No Visualforce Tabs have been defined."

## The Lightning App:

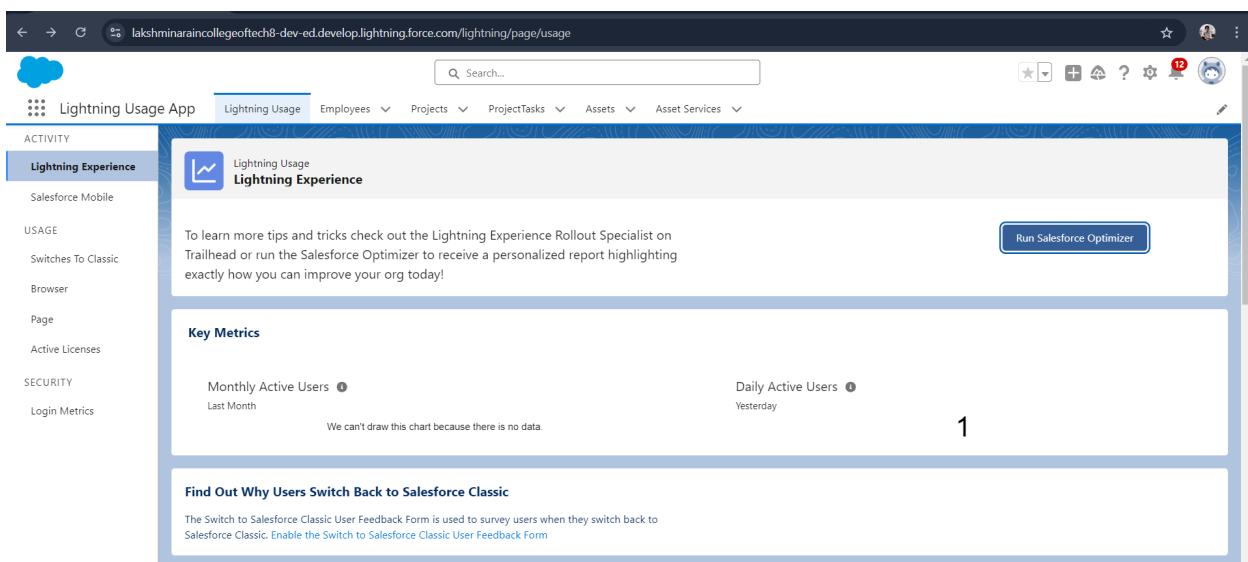
### Activity 1: Create a Lightning App

To create a lightning app page: Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.

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) Primarycolor hex value : keep this default

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

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 arrowbutton → Next. Note: select asset the custom object which we have created in the previous activity. To Add User Profiles: Search profiles (System administrator) in the search bar → click on the arrow button→ save .



## **Fields & Relationships**

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

Types of Fields :

1. Standard Fields
2. Custom Fields

Use Case :

Now it's time for you to think out of the box for your organization. You have successfully created the database objects for the organization but now all eyes turn on you as you have to define what sort of information the objects store which you have created. As a life saver of your organization you come up with the idea of creating fields to store different types of data.

### **Activity 1 : Creating Text Field in Employee Object**

To create fields in an object:

1. Go to setup → click on Object Manager → type object name(Employee) in quick find bar → click on the object.
2. Now click on “Fields& Relationships” → New
3. Select Data type as “Text”.
4. Click on Next
5. Fill the above as following: a. Field Label: Employee Name b. Length : 18 c. Field Name : gets auto generated d. Click on Next → Next → Save and new.

### **Activity 2 :Creating Date of Birth Field in Employee Object**

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “Date” and click Next.

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

### **Activity 3 : Creating Formula Field in Employee Object**

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “Formula” and click Next.
3. Give Field Label and FieldName as “Age” and select formula return type as “Number”and click next
4. Under Advanced Formula write down the formula and click “Check Syntax” and Next → Next- → Save & New.

### **Activity 4 : Creating Picklist Field in Employee Object**

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

### **Activity 5 : Creating Self-Relationship Field in Employee Object**

- a.Repeat step 1 and 2 mentioned in activity 1
- b. Select Data type as “Lookup Relationship” and click Next.
- c. Select Employeefrom the drop down related to the field and clickNext.
- d. Give Field Label as “Reports to” and click Next.
- e. Next - → Next - → Save & New.

### **Activity 6 :Creating Master-Detail Relationship between Employee & Asset Object**

To Create a Master-Detail relationship :

- 1.Go to the setup page - → click on object manager - → type object

name(ProjectTask) in the quick find bar → click on the object.

2. Click on fields & relationship → click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. For field label related to: select “Employee” object and click Next.
5. Give Field Label as “Employee Name” and click Next. Next → Next → Save & New.

## Activity 7 : Creating Remaining Fields in Employee Object

Now create the remaining fields using the data types mentioned Employee, Project, Project Task, Asset Service, Asset.

### Outputs: Fields in Employee object :

The screenshot shows the Salesforce Object Manager interface for the 'Employee' object. The left sidebar lists various setup options like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Fields & Relationships' and displays a table of 26 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The indexed column contains dropdown arrows. The data in the table is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text Area(255)		▼
Age	Age_c	Formula (Number)		▼
Cab Allowance	Cab_Allowance_c	Checkbox		▼
Cab Allowance Amount	Cab_Allowance_Amount_c	Currency(18, 0)		▼
Created By	CreatedBy	Lookup(User)		▼
Date of Birth	Date_of_Birth_c	Date		▼
Email	Email_c	Email		▼
Employee ID	Name	Auto Number		✓
Employee Name	Employee_Name_c	Text(18)		▼

SETUP > OBJECT MANAGER  
**Employee**

**Fields & Relationships**  
26 items, Sorted by Field Label

			Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking
Login Time	Login_Time__c	Time					
Logout Time	Logout_Time__c	Time					
Mode of Work	Mode_of_Work__c	Picklist					
Owner	OwnerId	Lookup(User,Group)	✓				
Phone no	Phone_no__c	Phone					
Qualification	Qualification__c	Text(18)					
Record Type	RecordTypeId	Record Type	✓				
Reports to	Reports_to__c	Lookup(Employee)	✓				
Wifi Allowance Amount	Wifi_Allowance_Amount__c	Currency(18, 0)					
Wifi Allowances	Wifi_Allowances__c	Checkbox					

## Fields in Project Object:

lakshminaraincollegeoftech8-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IWU000001Dcen/FieldsAndRelationships/view

Setup | Home | Object Manager

SETUP > OBJECT MANAGER  
**Project**

**Fields & Relationships**  
9 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Project ID	Name	Auto Number	✓	
Project Lead	Project_Lead__c	Text(18)		
Project Name	Project_Name__c	Text(18)		
Project Status	Project_Status__c	Picklist		
Start Date	Start_Date__c	Date		

## Fields in Project Task object:

The screenshot shows the Salesforce Object Manager interface for the 'ProjectTask' object. The left sidebar has 'Fields & Relationships' selected. The main area displays a table titled 'Fields & Relationships' with 7 items. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Employee Name	Employee_Name__c	Master-Detail(Employee)		✓
Finishes in	Finishes_in__c	Formula (Number)		
Last Modified By	LastModifiedById	Lookup(User)		
Project Task	Project_Task__c	Master-Detail(Project)		✓
ProjectTask Name	Name	Text(80)		✓
Working Hours	Working_Hours__c	Number(18, 0)		

## Field in Asset and Asset Service :

The screenshot shows the Salesforce Object Manager interface for the 'Asset' object. The left sidebar has 'Fields & Relationships' selected. The main area displays a table titled 'Fields & Relationships' with 8 items. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Asset Type	Asset_Type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Date Of Issue	Date_Of_Issue__c	Formula (Date)		
Employee Name	Employee_Name__c	Lookup(Employee)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Model Name	Model_Name__c	Text(18)		
Owner	OwnerId	Lookup(User,Group)		✓
Project Task Name	Name	Text(80)		✓

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Asset Id	Asset_Id_c	Lookup(Asset)		✓
Created By	CreatedById	Lookup(User)		
Description	Description__c	Long Text Area(300)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Project Task Name	Name	Text(80)		✓
Subject	Subject__c	Text Area(255)		
Technician	Technician__c	Text(18)		
Type	Type__c	Picklist		

## 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).

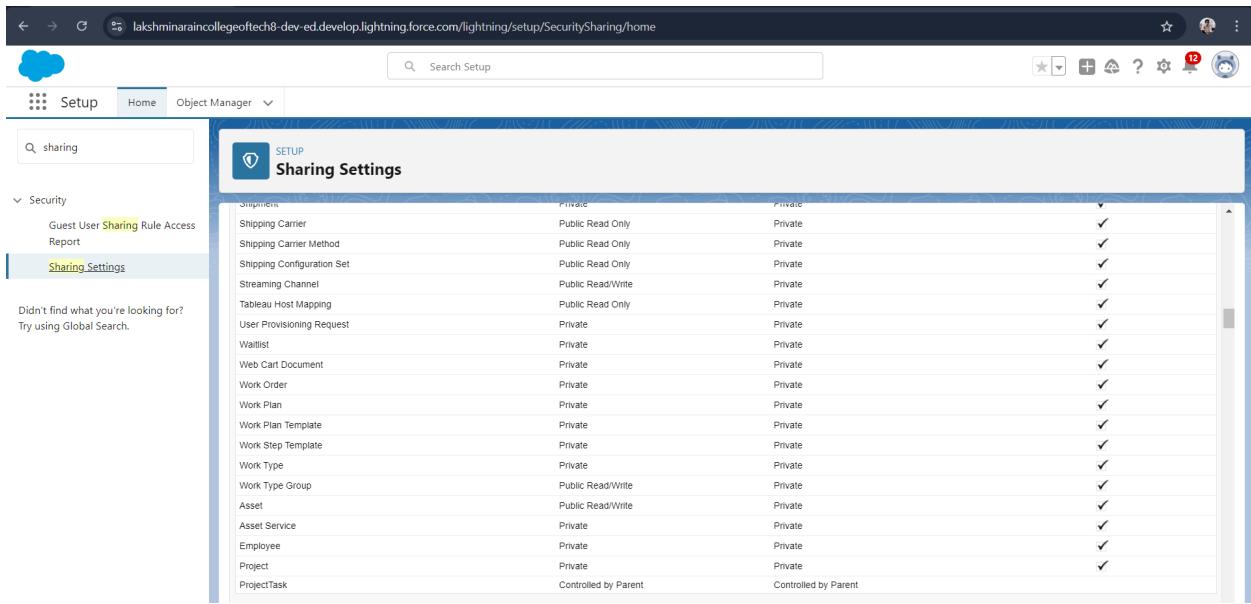
### **Activity 1:**

#### Create OWD Setting

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

## Activity 2:

Set OWD as Private for Project and Asset Service objects Output :



The screenshot shows the Salesforce Sharing Settings page. The left sidebar has a search bar and a 'Sharing' section with 'Sharing Settings' selected. The main area is titled 'Sharing Settings' and lists various objects with their sharing rules. A legend indicates that 'Private' is represented by a checkmark and 'Public Read Only' by a minus sign. The objects listed include Shipment, Shipping Carrier, Shipping Carrier Method, Shipping Configuration Set, Streaming Channel, Tableau Host Mapping, User Provisioning Request, Waitlist, Web Cart Document, Work Order, Work Plan, Work Plan Template, Work Step Template, Work Type, Work Type Group, Asset, Asset Service, Employee, Project, and ProjectTask. The 'Asset Service' row shows 'Private' in the first column and a checkmark in the second column.

Object	Sharing Rule	Status
Shipment	Private	✓
Shipping Carrier	Public Read Only	✗
Shipping Carrier Method	Public Read Only	✗
Shipping Configuration Set	Public Read Only	✗
Streaming Channel	Public Read/Write	✗
Tableau Host Mapping	Public Read Only	✗
User Provisioning Request	Private	✓
Waitlist	Private	✓
Web Cart Document	Private	✓
Work Order	Private	✓
Work Plan	Private	✓
Work Plan Template	Private	✓
Work Step Template	Private	✓
Work Type	Private	✓
Work Type Group	Public Read/Write	✗
Asset	Public Read/Write	✗
Asset Service	Private	✓
Employee	Private	✓
Project	Private	✓
ProjectTask	Controlled by Parent	Controlled by Parent

## User Adoption

### Activity 1: 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.

### Activity 2: View a Record(Employee)

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

### **Activity 3: Delete a Record (Employee)**

1. Click on App Launcher on the left side of the screen.
2. Search Employee Management System & click on it
3. Click on the Employee Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete.

### **Import Data**

NOTE- Before creating the application download this file from the URL given below and save the file in CSV. <https://tinyurl.com/SF-Employee-Data> .

### **Activity-1: Importing data using Data Wizard**

1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.
3. Click Launch Wizard!
4. Click the Custom Objects tab and select the Employee object.
5. Select Add new records.
6. Click CSV and choose file Employee\_CSV which we made earlier. Click Next. 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.
7. The next screen gives you a summary of your data import. Click Start Import
8. Click OK on the popup.
9. Scroll down the page and verify that your data has been imported under batches.

## Output :

The screenshot shows the Salesforce Setup interface with the 'Bulk Data Load Jobs' page selected. The left sidebar shows 'Environments' and 'Jobs' with 'Bulk Data Load Jobs' highlighted. The main content area is titled 'Monitor Bulk Data Load Jobs' and includes sections for 'Quota' (processed 0 batches in 24 hours, quota 15,000), 'In Progress' (no records), and 'Completed last 7 days' (one job by Patel\_Shivam). The URL in the address bar is https://lakshminaraincollegeoftech8-dev-ed.lightning.force.com/lightning/setup/AsyncApiJobStatus/home.

## Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce.

### Types of profiles in salesforce

1. Standard profiles: By default salesforce provides below standard profiles.
  - a. Contract Manager
  - b. Read Only
  - c. Marketing User
  - d. Solutions Manager
  - e. Standard User
  - f. System Administrator
2. Custom Profiles: Custom ones defined by us. They can be deleted if there are no users assigned with that particular one.

## **Activity 1:**

HR Profile To create a new profile:

1. Go to setup -> type profiles in quick find box -> click on profiles -> clone the desired profile (Standard user) -> enter profile name (HR) -> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Assets and Asset Services objects.
4. Scroll down and Click on Save.

## **Activity 2:**

Manager Profile

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

## **Activity 3:**

Create Employee Profile Create Employee Profiles for “On Site Employee”, “Remote Employee” as in Activity 2, but in step 3 only allow permission access for Project and Project 20 Task objects only.

## Output of Profiles:

The screenshot shows the Salesforce Setup interface for managing profiles. The URL is <https://lakshminaraincollegeoftech8-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eWU000005aqhx>. The page title is "Profiles". The left sidebar shows "Users" and "Profiles". The main content area is titled "Profile Manager". It displays the "Profile Detail" for the "Manager" profile, which includes the name "Manager", user license "Salesforce Platform", and creation details. Below this is the "Page Layouts" section, which lists various standard object layouts and their corresponding global and location layouts. For example, the "Global" layout for "Email Application" is "Not Assigned", while the "Lead" layout is "Lead Layout". The "Page Layouts" section also includes account and alternative payment method layouts.

The screenshot shows the Salesforce Setup interface for managing profiles. The URL is <https://lakshminaraincollegeoftech8-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eWU000005aqRq>. The page title is "Profiles". The left sidebar shows "Users" and "Profiles". The main content area is titled "Profile HR". It displays the "Profile Detail" for the "HR" profile, which includes the name "HR", user license "Salesforce", and creation details. Below this is the "Page Layouts" section, which lists various standard object layouts and their corresponding global and location layouts. For example, the "Global" layout for "Email Application" is "Not Assigned", while the "Location Group Assignment" layout is "Location Group Assignment Layout". The "Page Layouts" section also includes account and alternative payment method layouts.

lakshminaraincollegeoftech8-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eWU000005aqtf

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main content area displays the 'On Site Employee' profile. Key details include:

- Name:** On Site Employee
- User License:** Salesforce
- Description:** (empty)
- Created By:** Shivam Patel | 01/10/2024, 10:46 pm
- Modified By:** Shivam Patel | 02/10/2024, 2:03 am

**Page Layouts**

Standard Object Layouts	Global	Location Group
Email Application	Not Assigned [View Assignment]	Location Group Assignment [View Assignment]
Home Page Layout	DE Default [View Assignment]	Macro Macro Layout [View Assignment]
Account	Account Layout [View Assignment]	Object Milestone Object Milestone Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Operating Hours Operating Hours Layout [View Assignment]

lakshminaraincollegeoftech8-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eWU000005ar1

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main content area displays the 'Remote Employee' profile. Key details include:

- Name:** Remote Employee
- User License:** Salesforce Platform
- Description:** (empty)
- Created By:** Shivam Patel | 01/10/2024, 10:48 pm
- Modified By:** Shivam Patel | 02/10/2024, 2:03 am

**Page Layouts**

Standard Object Layouts	Global	Invoice Line
Email Application	Not Assigned [View Assignment]	Lead Lead Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location Location Layout [View Assignment]
Account	Account Layout [View Assignment]	Location Group Location Group Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Location Group Assignment Location Group Assignment Layout [View Assignment]

## Roles

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

### **Activity 1:**

Creating HR Role

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

### **Activity 2:**

Creating more roles Create three more roles for Manager, On Site Employee, Remote Employee Note: On Site Employee and Remote Employee reports to Manager. 23 Outputs: Creating HR role, Manager role, Onsite, Rempte employee

The screenshot shows the Salesforce Setup interface for managing roles. The left sidebar navigation includes 'Setup' (selected), 'Home', and 'Object Manager'. Under 'Setup', there are sections for 'Users' (with 'Roles' selected), 'Feature Settings', 'Sales' (with 'Contact Roles on Contracts' and 'Contact Roles on Opportunities'), 'Service' (with 'Case Teams' and 'Case Team Roles'), and 'Case' (with 'Contact Roles on Cases'). A search bar at the top right says 'Search Setup'. The main content area is titled 'SETUP Roles' and displays the 'Creating the Role Hierarchy' section. It states: 'You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.' Below this is the 'Your Organization's Role Hierarchy' tree:  
- Lakshmi Narain College of Technology  
 |- Add Role  
 |- CEO [Edit | Del | Assign]  
 |- Add Role  
 |- CFO [Edit | Del | Assign]  
 |- Add Role  
 |- COO [Edit | Del | Assign]  
 |- Add Role  
 |- HR [Edit | Del | Assign]  
 |- Add Role  
 |- Manager [Edit | Del | Assign]  
 |- Add Role  
 |- On Site Employee [Edit | Del | Assign]  
 |- Add Role  
 |- Remote Employee [Edit | Del | Assign]  
 |- Add Role  
 |- SVP, Customer Service & Support [Edit | Del | Assign]  
 |- Add Role  
 |- Customer Support, International [Edit | Del | Assign]  
 |- Add Role

lakshminaraincollegeoftech8-dev-ed.lightning.force.com/lightning/setup/Roles/page?address=%2F00EWU000004r4b3%3Fsetupid%3DRoles

The screenshot shows the Salesforce Setup interface for managing roles. The left sidebar is collapsed, showing a search bar and navigation links for Home and Object Manager. The main content area is titled "Roles" and displays the "HR" role details. The "Role Detail" section includes fields for Label (HR), Manager (CEO), Modified By (Shivam Patel), Opportunity Access, and Case Access. Below this, a table lists users assigned to the HR role, with columns for Role Name and Manager. A link to "Users in HR Role Help" is provided. At the bottom, a section titled "Users in HR Role" shows no records displayed.

lakshminaraincollegeoftech8-dev-ed.lightning.force.com/lightning/setup/Roles/page?address=%2F00EWU000004r4b3%3Fsetupid%3DRoles

The screenshot shows the Salesforce Setup interface for managing roles. The left sidebar is collapsed, showing a search bar and navigation links for Home and Object Manager. The main content area is titled "Roles" and displays the "Manager" role details. The "Role Detail" section includes fields for Label (Manager), Manager (CEO), Modified By (Shivam Patel), Opportunity Access, and Case Access. Below this, a table lists users assigned to the Manager role, with columns for Role Name and Manager. A link to "Users in Manager Role Help" is provided. At the bottom, a section titled "Users in Manager Role" shows no records displayed.

The screenshot shows the Salesforce Setup Roles page for the 'On Site Employee' role. The left sidebar shows navigation under 'Users' and 'Roles'. The main content area displays the 'Role Detail' for 'On Site Employee', which includes fields for Label (On Site Employee), This role reports to (Manager), Modified By (Shivam Patel), Opportunity Access, Case Access, Role Name as displayed on reports (On\_Site\_Employee), Sharing Groups, and Role (Role and Internal Subordinates). Below the detail section is a table titled 'Users in On Site Employee Role' showing one user assigned: Shiv R (shvr@gmail.com). A link 'Users in On Site Employee Role Help' is also present.

The screenshot shows the Salesforce Setup Roles page for the 'Remote Employee' role. The left sidebar shows navigation under 'Users' and 'Roles'. The main content area displays the 'Role Detail' for 'Remote Employee', which includes fields for Label (Remote Employee), This role reports to (Manager), Modified By (Shivam Patel), Opportunity Access, Case Access, Role Name as displayed on reports (Remote\_Employee), Sharing Groups, and Role (Role and Internal Subordinates). Below the detail section is a table titled 'Users in Remote Employee Role' showing no records displayed. A link 'Users in Remote Employee Role Help' is also present.

## Users

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

## Activity 1:

Create User 1. Go to setup → type users in quickfind box → select users → click New user. 2. Fill in the fields Save.

## Activity 2:

Creating another user 1. Go to setup → type users in quickfind box → select users → click New user. 2. Fill in the fields 3. Save.

## Activity 3:

Creating more users Create two more users as we created in activity 2. 26 Output users:

The screenshot shows the Salesforce Setup interface with the URL [lakshminaraincollegeoftech8-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005WU0000064Tt%3fredirect%3D1%26isUserEntityOverride%3D1](https://lakshminaraincollegeoftech8-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005WU0000064Tt%3fredirect%3D1%26isUserEntityOverride%3D1). The page title is "Users". The left sidebar shows navigation options like Setup, Home, Object Manager, and various user management sections such as Permission Set Groups, Profiles, Public Groups, Queues, Roles, and User Management Settings. The "Users" section is currently selected. The main content area displays the "User Detail" page for a user named "shiv R". The "User Detail" section includes fields for Name (shiv R), Alias (sr), Email (shiv@gmail.com), Username (shiv@gmail.com), Nickname (User17278116068074667322), Title, Company, Department, Division, Address, Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata), Locale (English (India)), Language (English), Delegated Approver (Manager), Receive Approval Request Emails (Only if I am an approver), Federation ID, Role (On Site Employee), User License (Salesforce), Profile (On Site Employee), Active (checked), Marketing User (unchecked), Offline User (unchecked), Knowledge User (unchecked), Flow User (unchecked), Service Cloud User (unchecked), Site.com Contributor User (unchecked), Site.com Publisher User (unchecked), WDC User (unchecked), Mobile Push Registrations (View), Data.com User Type (checked), Accessibility Mode (Classic Only) (checked), Debug Mode (checked), and High-Contrast Palette on Charts (checked). There is also a "User Profile Help for this Page" link at the top right of the detail section.

User Detail

**Shivam Patel**

Name: Shivam Patel  
Alias: SPatel  
Email: shivampatel17119@gmail.com [Verified]  
Username: shivamx567@gmail.com  
Nickname: shivamx567  
Title: Lakshmi Narain College of Technology  
Company: IN  
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)  
Locale: English (India)  
Language: English  
Delegated Approver: Manager  
Receive Approval Request Emails: Only if I am an approver  
Federation ID:

Role  
User License: Salesforce  
Profile: System Administrator  
Active: ✓  
Marketing User: ✓  
Offline User: ✓  
Knowledge User:   
Flow User:   
Service Cloud User: ✓  
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Mobile Push Registrations: View  
Data.com User Type:   
Accessibility Mode (Classic Only):    
Debug Mode:    
High-Contrast Palette on Charts:

## Page layouts

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

### **Activity 1 :**

Creating a page layout for Employee object To Create a Page layout:

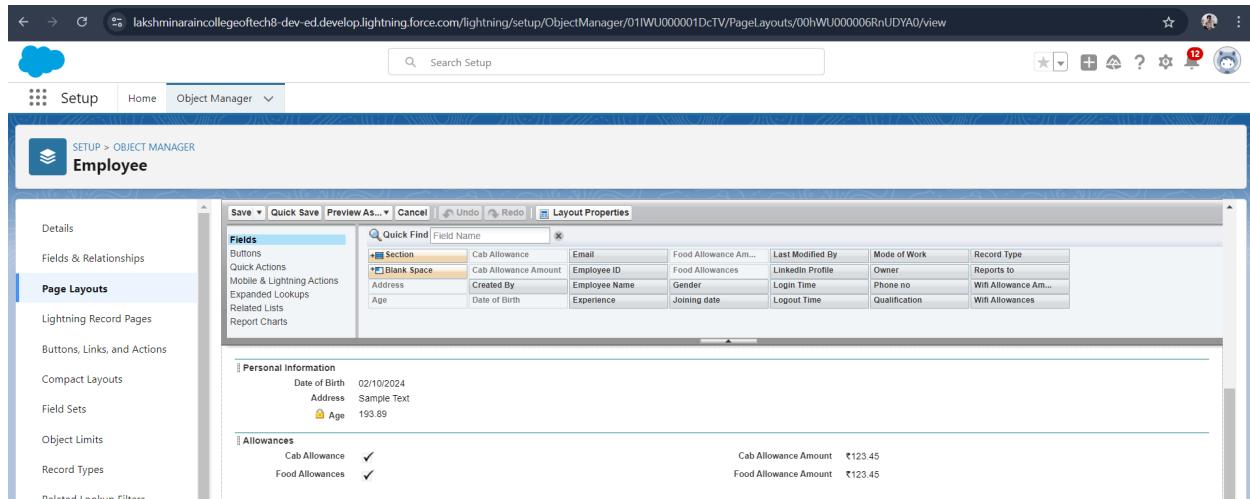
1. Go to Setup --> Click on Object Manager --> Search for the object (Employee) --> From drop down click on Edit.
2. Click on Page layout --> Click on New.
3. Give Page layout Name as “On Site Employee Layout” and click on Save.
4. Drag and drop the Section from the highlight panel below the Information and name it as “Personal Information” and click Ok.
5. Drag Date of Birth, Address and Age fields from EmployeeInformation to PersonalInformation section.

6. Similarly perform the above step to create “Allowances” and add allowances fields in it as shown below. 7. Click Save. 8. Make sure your page layout looks like the picture above.

## Output:

The screenshot shows the Salesforce Object Manager interface for the 'Employee' object. The left sidebar lists various setup categories. The 'Page Layouts' section is selected. The main area shows the 'Employee Detail' layout with fields like Employee ID, Employee Name, Date of Birth, Age, Gender, Reports to, Qualification, Address, Experience, Phone no, Email, Joining date, Mode of Work, and LinkedIn Profile. Below this, a table displays specific field values: Cab Allowance (✓), Food Allowances (✓), Wifi Allowances (✓), Cab Allowance Amount (₹123.45), Food Allowance Amount (₹123.45), Wifi Allowance Amount (₹123.45), Login Time (Sample Text), Logout Time (Sample Text), and LinkedIn Profile (www.salesforce.com). The top navigation bar includes 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties' buttons.

This screenshot shows the same Salesforce Object Manager interface for the 'Employee' object, but after saving the changes. The 'Fields' section remains the same, but the 'Employee Detail' section now includes a 'Custom Links' header with a link labeled 'Allowances'. The rest of the layout and data are identical to the previous screenshot.



## Chatter Group

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

### Activity 1 :

Creating a chatter group for your organization. To Create a chattergroup:

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:
5. Click Save & Next. Skip the UploadPicture 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 InternalDiscussion Group, here you can post anything which is related to ongoing projects. Click Save.

## **Output:**

The screenshot shows the Chatter Home page within the 'Lightning Usage App'. On the left, there's a sidebar with sections for 'What I Follow', 'To Me', 'Bookmarked', 'Company Highlights', 'My Drafts', 'STREAMS' (with a note about creating one), and 'RECENT GROUPS' (listing 'Internal Discussion'). The main content area has tabs for 'Post', 'Poll', and 'Question', with 'Post' selected. A large input field says 'Share an update...' with a 'Share' button. Below it, a list shows a post from 'Internal Discussion' (Private With Customers) by 'Shivam Patel' posted 21h ago, with the text 'hi'. There are 'Like' and 'Comment' buttons. To the right, there's an 'Einstein Recommendations' sidebar listing three users: 'shiv R' (Joined today), 'Integration User' (Joined in the last week), and 'Security User' (Joined in the last week), each with a '+ Follow' and 'Skip' button.

## **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 picklistfields and valuesfor the same business processand various businessprocesses.

### **Activity 1:**

Creating On Site EmployeeRecord 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 checkfor the Manager& System Administrator profile and click on Next.
6. Select “Apply a different layoutfor each profile”, and change page layout to On Site Employee Layoutfor manager profileand System Administrator. click Save.

## **Activity 2:**

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

1. Note: use Remote Employeepage layout for Remote Employee record type. Permission sets A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profilebut, depending on the Salesforce edition, they can have multiplepermission sets. Activity 1: Creatinga permission set To Create a Permission Set: 1. Go to setup -→ type “permission sets” in quick search -→ select permissionssets - → New. 2. Enterthe label name as “Per to Emp” -→ Save. 3. Under Apps Select object settings. 4. Click on Employeeobject -→ click on Edit -→ under object permission check for read and create. 5. Click on Save. 6. After savingthe permission clickon the Manage assignment 7. Now click on the Manage Assignment. 8. Click on Add Assignment. 9. Now selectthe users(any one user with the profile“On Site Employee”) and click on Next. 10. Click on Assign and Done Output:

The screenshot shows the Salesforce Setup interface with the URL [lakshminaraincollegeoftech8-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PSWU000006CND](https://lakshminaraincollegeoftech8-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PSWU000006CND). The left sidebar is titled 'Setup' and includes sections for 'Users' (Permission Set Groups, Permission Sets, Custom Code, Custom Permissions), 'Customize' (Customize Home Page, Customize Objects, Customize Fields, Customize Reports & Dashboards, Customize Buttons, Links & Forms, Customize Layouts, Customize Record Types, Customize Profiles & Permissions, Customize Help & Support, Customize App Navigation, Customize Home Page), and 'Find what you're looking for?' with a 'Try using Global Search.' link. The main content area is titled 'Permission Sets' and shows a 'Permission Set Overview' for 'Per to Emp'. The overview includes fields for Description (empty), License (empty), Session Activation Required (unchecked), and Permission Set Groups Added To (0). On the right, it shows API Name: Per\_to\_Emp, Namespace Prefix: (empty), Created By: Shivam Patel (02/10/2024, 1:04 am), and Last Modified By: Shivam Patel (02/10/2024, 1:06 am). Below the overview, there are sections for 'Apps' (Assigned Apps, Assigned Connected Apps) and 'Object Settings' (Object Settings, App Permissions, Apex Class Access, Visualforce Page Access).

## REPORTS

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

Types of Reports in Salesforce

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

### **Activity 1:**

Create Report To Create a Report:

1. Go to the app → click on the report stab
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 Save or run it.

## Output:

The screenshot shows a Lightning report titled "Report: Employees New Employees Report". The table displays 14 records of employees, each with Employee ID, Age, Address, Date of Birth, and Email. The total age is listed as 356.00.

	Employee: Employee ID	Age	Address	Date of Birth	Email
1	EMS-0002	31.00	-	01/01/1993	jackie@abc.com
2	EMS-0003	26.00	-	27/02/1998	james@abc.com
3	EMS-0004	25.00	-	16/03/1999	benjamin@abc.com
4	EMS-0005	23.00	-	14/07/2001	alex@abc.com
5	EMS-0006	22.00	-	05/11/2002	william@abc.com
6	EMS-0007	29.00	-	11/11/1995	ethan@abc.com
7	EMS-0008	26.00	-	29/11/1998	emma@abc.com
8	EMS-0009	22.00	-	03/08/2002	olivia@abc.com
9	EMS-0010	24.00	-	27/03/2000	sophia@abc.com
10	EMS-0011	28.00	-	17/06/1996	isabella@abc.com
11	EMS-0012	25.00	-	19/09/1999	amelia@abc.com
12	EMS-0013	25.00	-	24/05/1999	elizabeth@abc.com
13	EMS-0014	26.00	-	07/03/1998	scarlett@abc.com
14	EMS-0015	24.00	-	07/09/2000	chloe@abc.com
15		356.00			

## Activity 2:

Create 2 more Reports :

1. Create a report with report type: “Employees with Project Tasks and Projects”.
2. Create a report with report type: “Employees with Assets”. Created report “Employees with Project Tasks and Projects” Output:

The screenshot shows a Lightning report titled "Report: Assets with Employee Name Employees with Assets". The table displays 9 records of assets assigned to employees, including Asset Name, Asset ID, Employee Name, Employee ID, Date Of Issue, Record ID, and Mode of Work.

	Asset: Asset Name	Asset: ID	Employee Name: Employee Name	Employee Name: Employee ID	Date Of Issue	Employee Name: Record ID	Employee Name: Mode of Work
1	Lenova	a03Qy0000007tLk	Jackie Chan	EMS-0002	05/12/2012	a00Qy00000UN211	On Site
2	HP	a03Qy0000007tED	Emma	EMS-0008	13/11/2020	a00Qy00000UN212	Remote
3	HP	a03Qy0000007t6P	Emma	EMS-0008	13/11/2020	a00Qy00000UN212	Remote
4	HP	a03Qy0000007tLRB	Emma	EMS-0008	13/11/2020	a00Qy00000UN212	Remote
5	Dell	a03Qy0000007tssG	Amelia	EMS-0012	19/09/2021	a00Qy00000UN223	On Site
6	Dell	a03Qy0000007tHfv	Amelia	EMS-0012	19/09/2021	a00Qy00000UN223	On Site
7	Dell	a03Qy0000007tLUp	Amelia	EMS-0012	19/09/2021	a00Qy00000UN223	On Site
8	Dell	a03Qy0000007tLZf	Amelia	EMS-0012	19/09/2021	a00Qy00000UN223	On Site
9	Dell	a03Qy0000007tLZf	Amelia	EMS-0012	19/09/2021	a00Qy00000UN223	On Site

	Employee: Employee ID	Employee Name	ProjectTask: ProjectTask Name	Project Task: Project ID	Joining date	Email	Experience	Mode of Work
1	EMS-00105	Alexander	Developing	Proj-003	15/05/2021	alex@abc.com	2	On Site
2	EMS-00108	Emma	Monitoring	Proj-004	13/11/2020	emma@abc.com	3	Remote
3	EMS-00113	Elizabeth	Testing	Proj-001	27/02/2021	elizabeth@abc.com	2	Remote
4	EMS-00112	Amelia	Testing	Proj-001	19/09/2021	amelia@abc.com	2	On Site
5	EMS-00102	Jackie Chan	Data analysing	Proj-001	05/12/2012	jackie@abc.com	9	On Site

## Dashboards

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

### **Activity 1:**

Create Dashboard To Create a Dashboard 1. Go to the app → click on the Dashboards tabs. 2. Give a Name and click on Create. 3. Select add component. 4. Select a Report and click on select. 5. Click Add then click on Save and then click on Done.

## Output:

The screenshot shows a Salesforce Lightning dashboard titled "Dashboard1". The top navigation bar includes links for Lightning Usage, Employees, Projects, ProjectTasks, Assets, Asset Services, Chatter Home, Employees with Assets, and a refresh button. The main content area displays a table titled "New Employees Report" with columns: Employee ID, Age, Address, Date of Birth, and Email. The data in the table is as follows:

Employee: Employee ID	Age	Address	Date of Birth	Email
EMS-0002	31.00	-	01/01/1993	jackie@abc.com
EMS-0003	26.00	-	27/02/1998	james@abc.com
EMS-0004	25.00	-	16/03/1999	benjamin@abc.com
EMS-0005	23.00	-	14/07/2001	alex@abc.com
EMS-0006	22.00	-	05/11/2002	william@abc.com
EMS-0007	29.00	-	11/11/1995	ethan@abc.com
EMS-0008	26.00	-	29/11/1998	emma@abc.com

[View Report \(New Employees Report\)](#)

## Activity 2:

Create another Dashboard as we discussed in activity 1.

## Output :

The screenshot shows a Salesforce Lightning dashboard titled "Dashboard2". The top navigation bar includes links for Lightning Usage, Employees, Projects, ProjectTasks, Assets, Asset Services, Chatter Home, Employees with Assets, and a refresh button. The main content area displays two components: a "New Employees Report" table and a "Employees with Assets" chart.

**New Employees Report:**

Employee: Employee ID	Age	Address	Date of Birth	Email
EMS-0002	31.00	-	01/01/1993	jackie@abc.com
EMS-0003	26.00	-	27/02/1998	james@abc.com
EMS-0004	25.00	-	16/03/1999	benjamin@abc.com
EMS-0005	23.00	-	14/07/2001	alex@abc.com
EMS-0006	22.00	-	05/11/2002	william@abc.com
EMS-0007	29.00	-	11/11/1995	ethan@abc.com
EMS-0008	26.00	-	29/11/1998	emma@abc.com

[View Report \(New Employees Report\)](#)

**Employees with Assets:**

We can't draw this chart because there is no data.

[View Report \(Employees with Assets\)](#)

## **Challenges & Solutions**

### **Data Integration Challenges**

- Challenge: Integrating existing employee data from various sources can lead to inconsistencies and errors.
- Solution: Implement a robust data mapping and validation process. Use ETL (Extract, Transform, Load) tools to ensure data accuracy and consistency before importing it into the Salesforce platform.

### **User Adoption**

- Challenge: Employees may resist using a new system, leading to low adoption rates.
- Solution: Provide comprehensive training sessions and user-friendly documentation. Engage key stakeholders early in the project to promote ownership and encourage adoption through pilot programs.

### **Customization Complexity**

- Challenge: Customizing the user interface to meet diverse user needs can become complicated.
- Solution: Gather requirements through user interviews and feedback sessions. Prioritize features based on user needs and gradually roll out customizations in phases.

### **Performance Tracking Difficulties**

- Challenge: Tracking employee performance across multiple projects can be complex.
- Solution: Develop clear metrics and KPIs for performance assessment. Utilize Salesforce's reporting tools to create dashboards that visualize performance data in real time.

## **Security and Data Privacy**

- Challenge: Protecting sensitive employee information while ensuring appropriate access levels.
- Solution: Implement role-based access controls and conduct regular security audits. Utilize Salesforce's built-in security features to manage data visibility and compliance.

## **Future Recommendations**

### **Continuous Improvement**

- Regularly collect user feedback to refine and enhance the application. Implement agile methodologies to adapt to changing user needs and organizational goals.

### **Integration with Other Tools**

- Explore integrating the Workforce Administration Solution with other HR and project management tools to create a more seamless workflow and enhance functionality.

### **Mobile Access**

- Consider developing a mobile-friendly version of the application to provide employees with greater flexibility and access while on the go.

### **Advanced Analytics**

- Leverage AI and machine learning capabilities within Salesforce to provide predictive analytics for workforce planning and performance forecasting.

### **Community Building**

- Create a user community or forum where employees can share best practices, tips, and provide support to each other, fostering a culture of collaboration and continuous learning.

## **Conclusion**

The Workforce Administration Solution aims to transform how organizations manage employee data, project assignments, and asset tracking. By addressing key challenges through strategic solutions and fostering user adoption, the platform can significantly enhance operational efficiency. Future recommendations, such as continuous improvement, integration with other tools, and leveraging advanced analytics, will ensure the solution remains relevant and effective. Ultimately, the successful implementation of this application will lead to a more engaged workforce, improved performance tracking, and a streamlined asset management process, positioning the organization for future growth and success.