WORKFORCE ADMINISTRATION SOLUTION

BY

Bala sandeep lavakusa Redla

(balasandeep0143@gmail.com)

ABSTRACT

The Workforce Administration Solution represents a significant advancement in how organizations manage their employee-related processes, particularly in project assignment and asset tracking. As TheSmartBridge company transitions to Salesforce, a leading cloud technology platform, it aims to enhance data security, improve operational efficiency, and streamline system administration.

This document outlines the key features and benefits of the Workforce Administration Solution, detailing how Salesforce's robust capabilities support the centralized management of employee data, project involvement, performance tracking, and asset assignments.

In this context, the transition to Salesforce addresses critical challenges associated with traditional data management systems. By utilizing Salesforce's cloud infrastructure, TheSmartBridge ensures the safe storage of sensitive employee information through advanced encryption techniques and proactive backup mechanisms. The platform's automated data replication capabilities offer enhanced protection and effective disaster recovery solutions, safeguarding organizational data against potential threats.

Moreover, the scalability of Salesforce resources allows TheSmartBridge to optimize system performance, ensuring fast and reliable access to crucial data. This transformation not only simplifies administrative tasks but also reduces system complexity, enabling system administrators to concentrate on higher-value activities that drive productivity.

Each of these elements plays a vital role in creating a comprehensive workforce administration framework that supports data-driven decision-making and enhances organizational effectiveness.

Key learning objectives of this project include real-time project management, effective data modeling, application creation, user interface customization, bulk data importing, security best practices, group collaboration tools, and the generation of insightful reports and dashboards

Ultimately, the Workforce Administration Solution is designed to empower TheSmartBridge to achieve greater operational efficiency, improve employee performance tracking, and optimize asset management processes, establishing a foundation for future growth and success in a dynamic business environment.

This document serves as a comprehensive guide to the project, providing insights into the methodologies employed, the technologies leveraged, and the anticipated outcomes of this transformative initiative.

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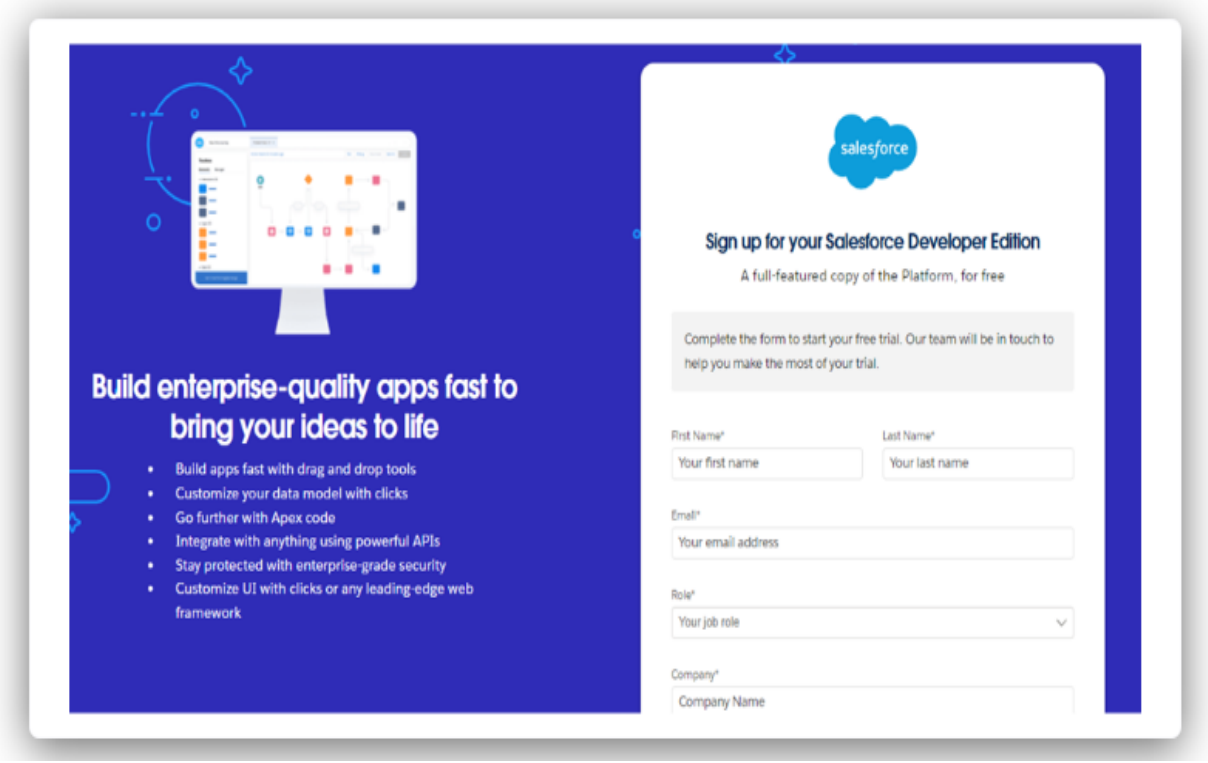
INTRODUCTION

In today’s fast-paced business environment, effective workforce management is crucial for success. TheSmartBridge recognizes the need to innovate and enhance its employee management processes, particularly in project assignments and asset tracking. To achieve this, the organization is embarking on a transformative journey by implementing the Workforce Administration Solution using Salesforce. This initiative aims to centralize employee data, streamline operations, and provide real-time insights that drive productivity.

By leveraging Salesforce’s powerful capabilities, TheSmartBridge will not only improve operational efficiency but also foster a culture of collaboration and data-driven decision-making. This project is designed to empower employees, enabling them to perform at their best while ensuring that the organization can scale and adapt to future challenges. With the first step being the creation of a Salesforce Developer Edition account, TheSmartBridge is poised to harness cutting-edge technology to meet its unique business requirements and propel the organization toward greater success.

TASK 1: Creating Developer Account

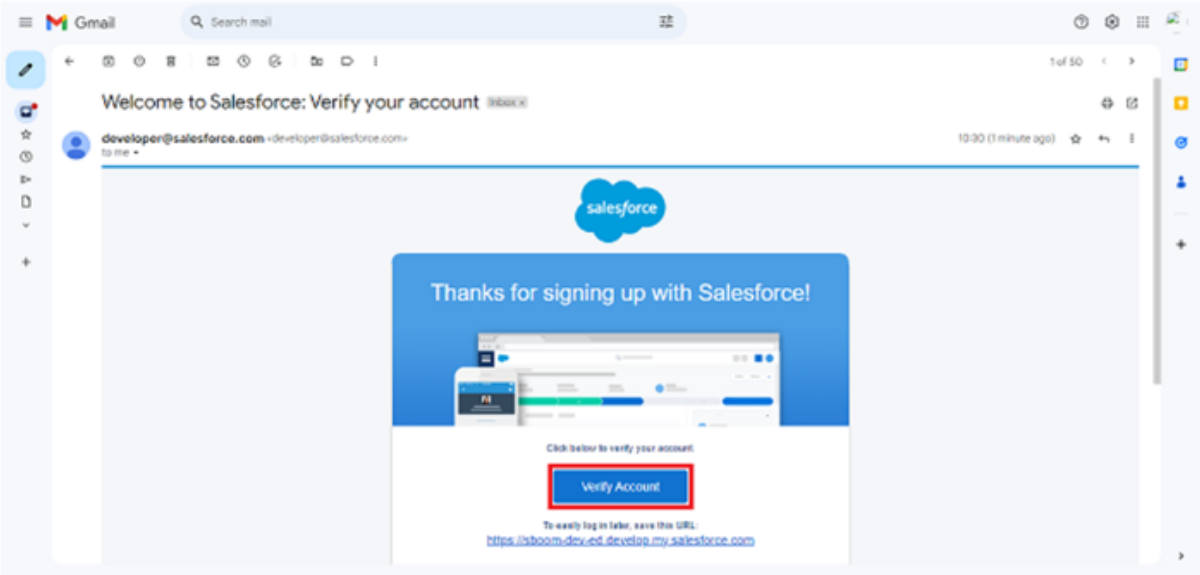
To create a Salesforce Developer Edition account, visit the Salesforce Developer website and click on "Sign Up." Fill in the required fields, including your name, email address, and company information, and agree to the terms of service. Once you submit the form, you will receive a confirmation email.
Click on the link in the email to verify your account, and then set your password. After that, you can log in to your new Developer Edition account using your email and the password you just created. This account will provide you with access to Salesforce's powerful development tools, allowing you to experiment, build, and customize solutions tailored to TheSmartBridge’s needs.
(https://developer.salesforce.com/signup)



- **First Name & Last Name**
  Enter your first and last name in the respective fields.
- **Email**
  Provide a valid email address. (Note: This doesn't need to be an actual email)
  you can give anything in the format : username@organization.com
- **Role**
  Select "Developer" from the role options.
- **Company**
  Input your college name as the company.
- **Country**
  Choose "India" from the country dropdown menu.
- **Postal Code**
  Enter your postal code (pin code).
- **Username**
  Create a username by combining your name and college name (e.g., firstname.collegename).
- **Sign Up**
  Click on the "Sign Me Up" button to complete the registration process.

TASK 2: Account Activation

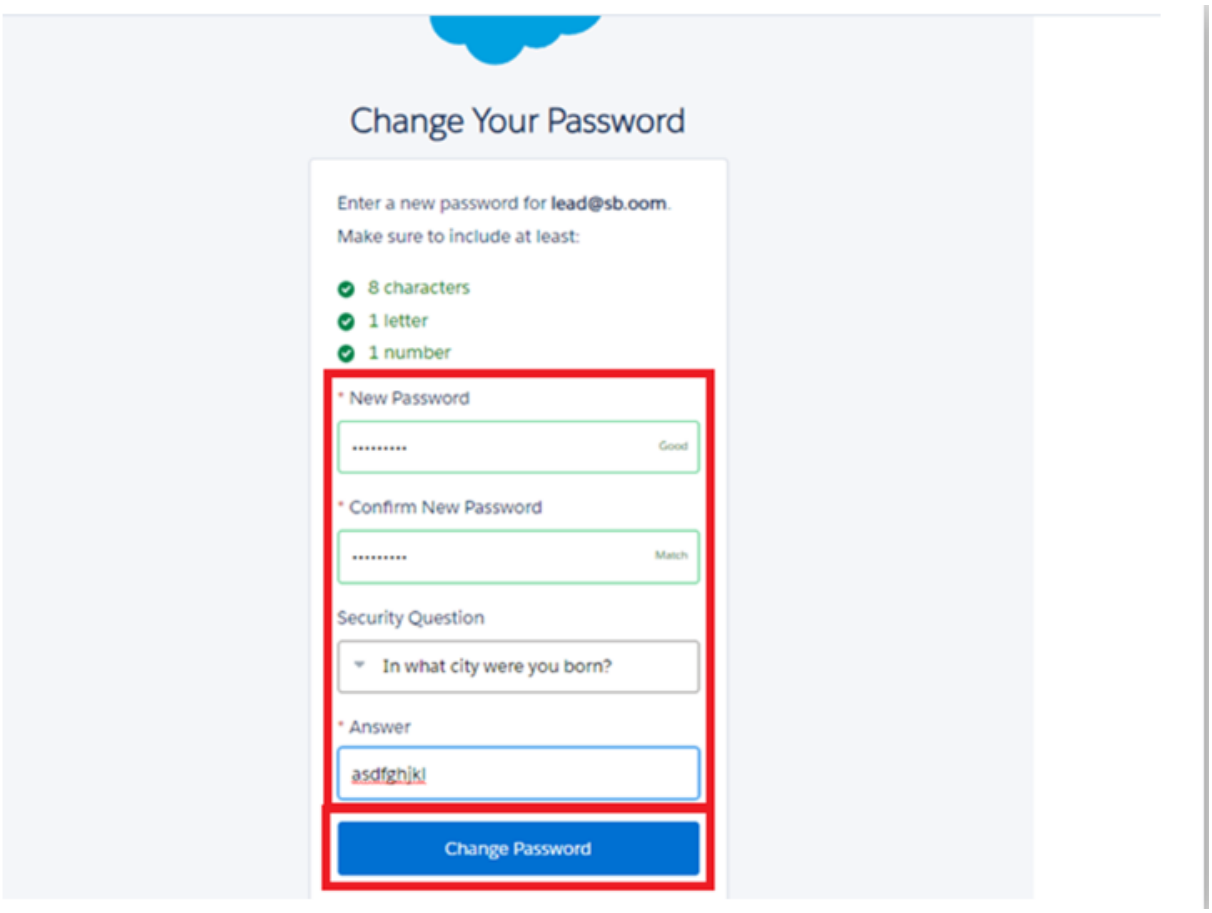
1. Check the inbox of the email address you used to sign up. Look for the verification email and click on the link to activate your account. It may take 5-10 minutes for the email to arrive.

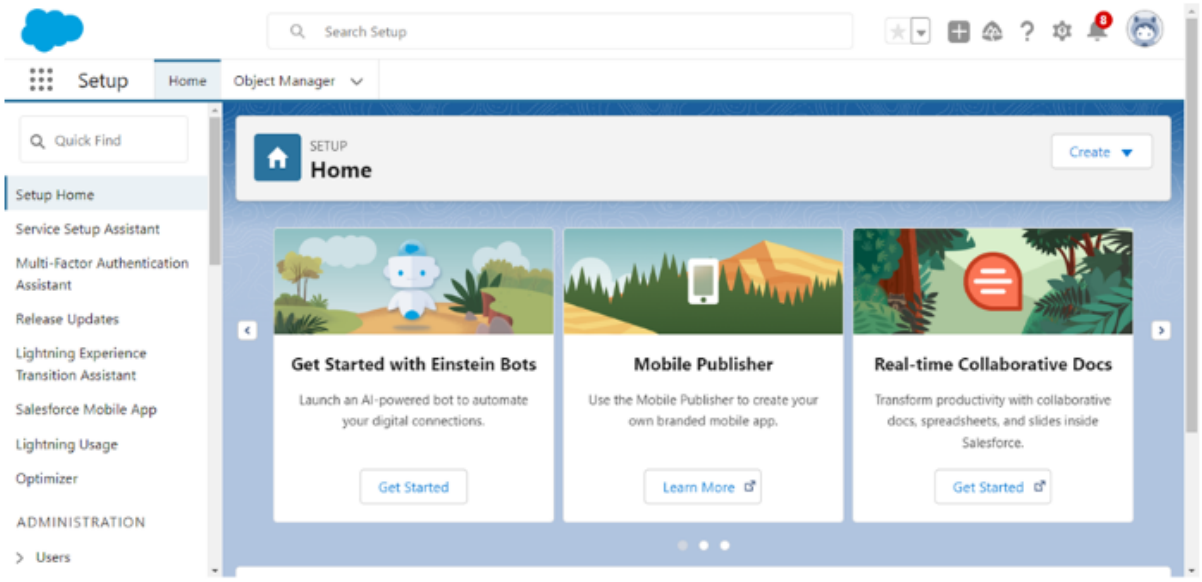


2. Click on Verify Account

3. Give a password and answer a security question and click on change password.

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


Change Your Password
Enter a new password for lead@sb.oom.
Make sure to include at least:
8 characters
1 letter
1 number
* New Password
Good
* Confirm New Password
Match
Security Question
In what city were you born?
* Answer
asdfghjkl
Change Password


Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
SETUP
Home
Create
Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
Get Started
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More
Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started

OBJECTS

Salesforce objects are essentially database tables that allow organizations to store and manage their unique data. There are two main types of Salesforce objects:

1. ***Standard Objects:*** These are built-in objects provided by Salesforce, including essential elements like users, contracts, reports, and dashboards. They come ready to use and cater to common business needs.

2. ***Custom Objects:*** These are tailored objects created by users to capture specific information vital to their organization. Custom objects play a crucial role in applications, providing a framework for organizing and sharing data that is unique to each business.

In summary, Salesforce objects help organizations efficiently manage their data, whether it's standard information provided by Salesforce or customized details specific to their operations.

Creating an object within your Salesforce organization is vital for effective data management and process automation. By defining custom objects, businesses can tailor their data structure to meet specific needs, leading to streamlined workflows, personalized reporting, and an improved user experience. These objects form the backbone of how critical information is organized and utilized within Salesforce.

As an Admin for TheSmartBridge, you play a key role in ensuring that data is stored and managed according to the organization’s requirements.

Navigating to the Setup Page:

To get started, simply click on the gear icon and select **Setup**. This is your gateway to customizing and optimizing your Salesforce environment!

TASK 1: Create Employee Object

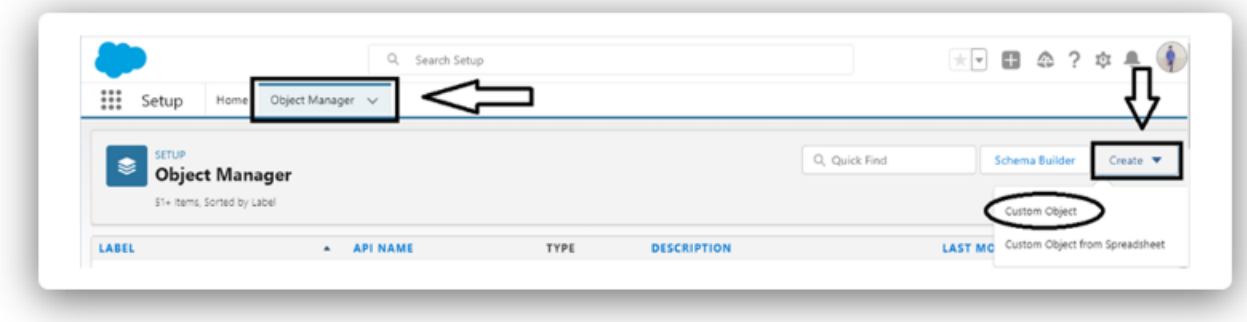
Employee Custom Object

The Employee custom object is designed to monitor employee activities and track both individual and team progress effectively. This helps organizations stay organized and ensures that performance is measurable.

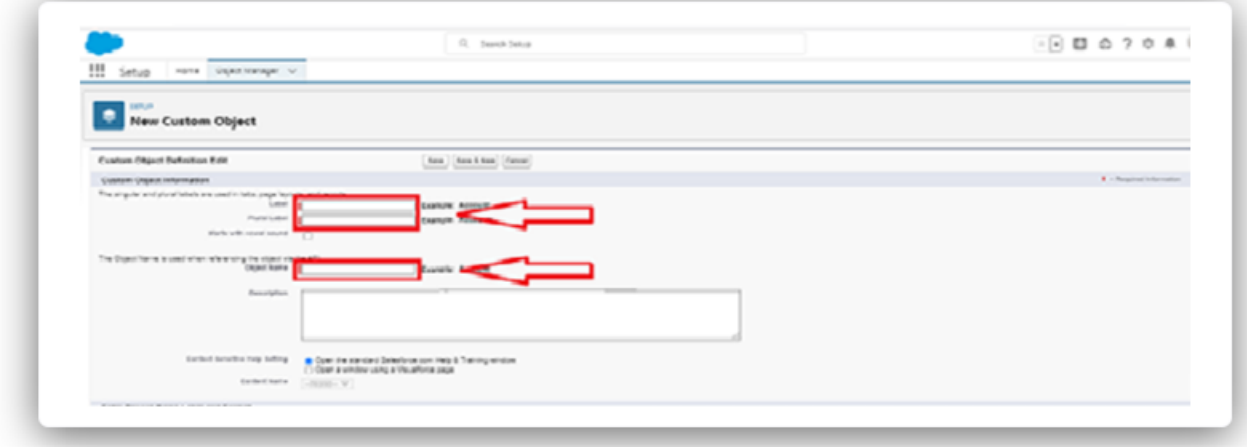
Steps to Create a Custom Object:

1. Go to the **Setup** page.
2. Select **Object Manager**.
3. Click on **Create**.
4. Choose **Custom Object**.

This process allows you to tailor your Salesforce environment to better meet your organization's needs!



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



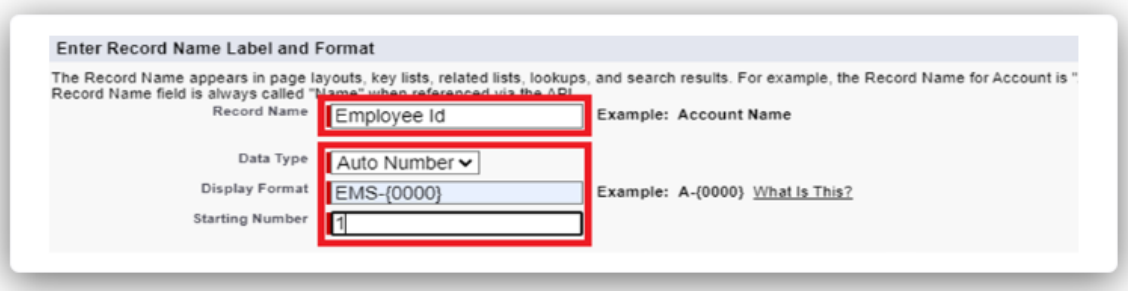
3) Enter Record Name Label and Format

1 Record Name : Employee ID

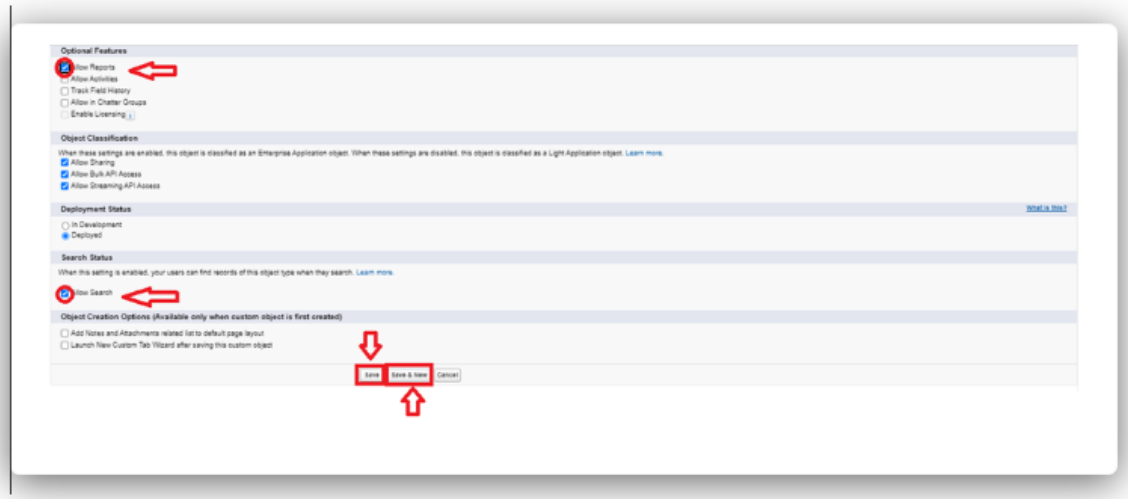
2 Data Type : Auto Number

3 Display Format : EMS-{0000}

4 Starting Number : 1



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



TABS

Tabs are essential user interface elements in Salesforce that allow users to create and view records for various objects. Here are the main types of tabs you can use:

01 CUSTOM TABS
02 WEB TABS
03 VISUALFORCE TABS
04 Lightning component Tabs
05 Lightning page Tabs

- **Customtabs**
  These are designed for custom objects and serve as the interface for custom applications in Salesforce, functioning similarly to standard tabs like Accounts or Contacts.
- **WebTabs**
  Web Tabs allow you to display web content or applications directly within Salesforce. This enables quick access to frequently used external resources without leaving the Salesforce environment.
- **VisualforceTabs**
  These tabs showcase Visualforce pages and behave like standard Salesforce tabs. They are useful for creating custom user interfaces tailored to specific needs.
- **LightningComponentTabs**
  These tabs enable the inclusion of Lightning components in the navigation menu for both Lightning Experience and the Salesforce mobile app, enhancing user interaction.
- **Lightning Page Tabs**
  Lightning Page Tabs provide access to Lightning Pages in the mobile app's navigation menu. Unlike other tabs, they do not appear in the All Tabs page or in the Available Tabs list when customizing your app.

TASK 1: Creating a Custom Tab (Employee)

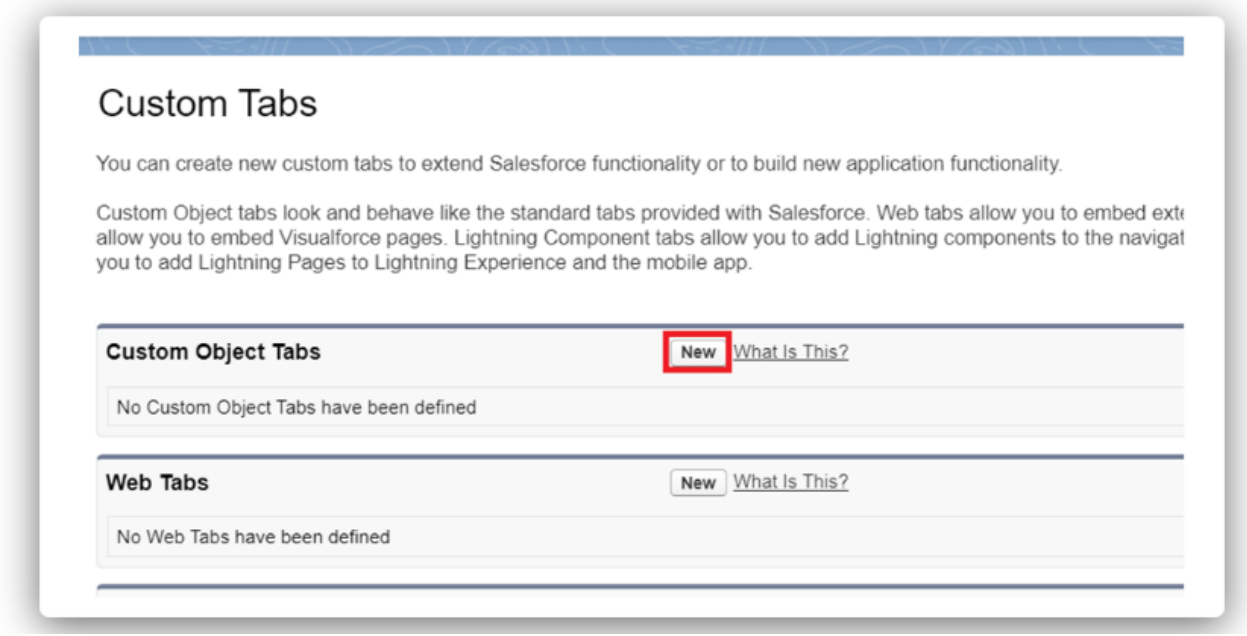
To create a Tab:(Employee)

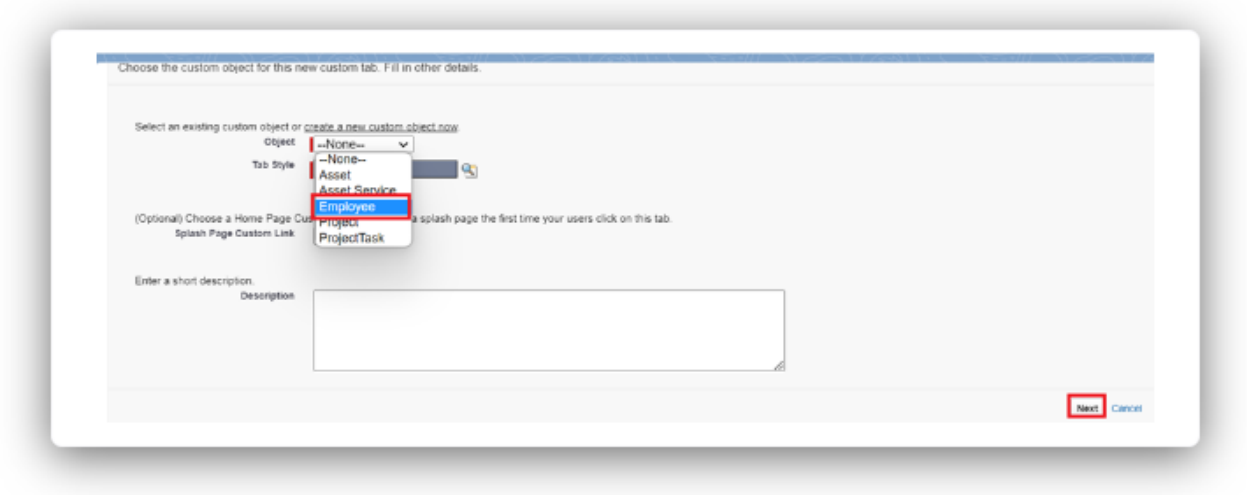
1. Go to setup page --> type Tabs in Quick Find bar --> click on tabs -->New (under custom object tab)

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

Activity 2: Creating a Custom Tab (Project)

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





- **Choose the Object**: Select Employee.
- **Select Tab Style**: Pick any desired tab style.
- **Proceed to Next Step**: Click Next.
- **Add to Profiles Page**: Leave the default settings as is and click Next.
- **Add to Custom App**: Keep the default settings and click Next.

Save Your Changes: Click Save to complete the process

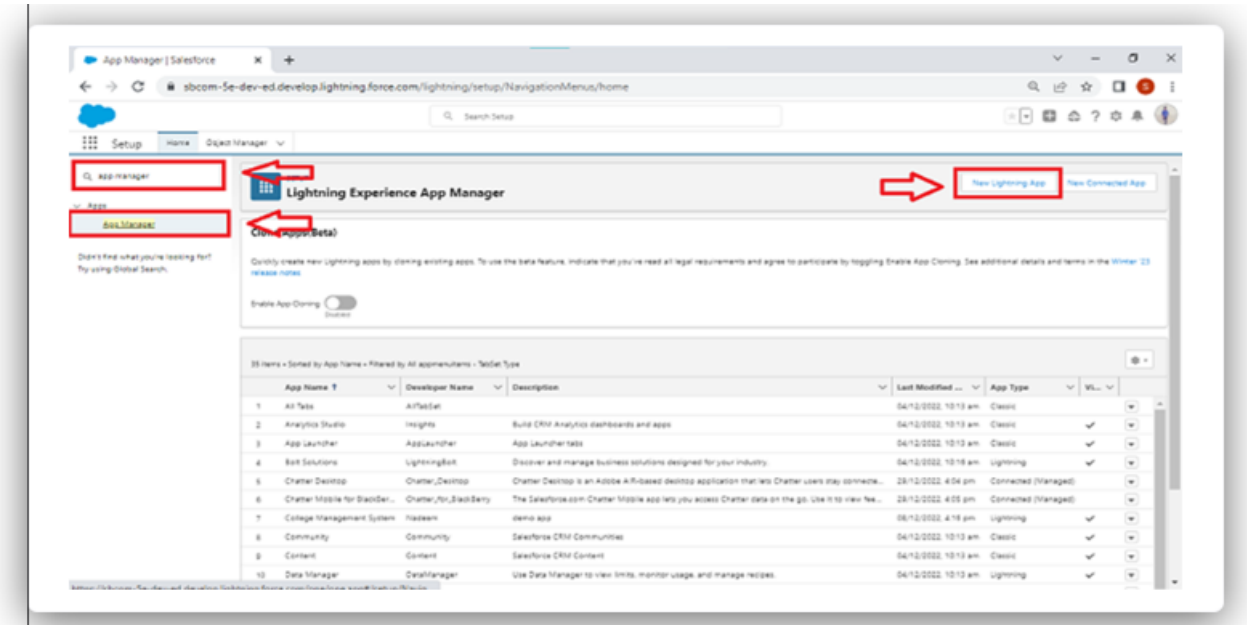
Activity 3: Creating tabs for remaining objects

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

Activity 1: Create a Lightning App

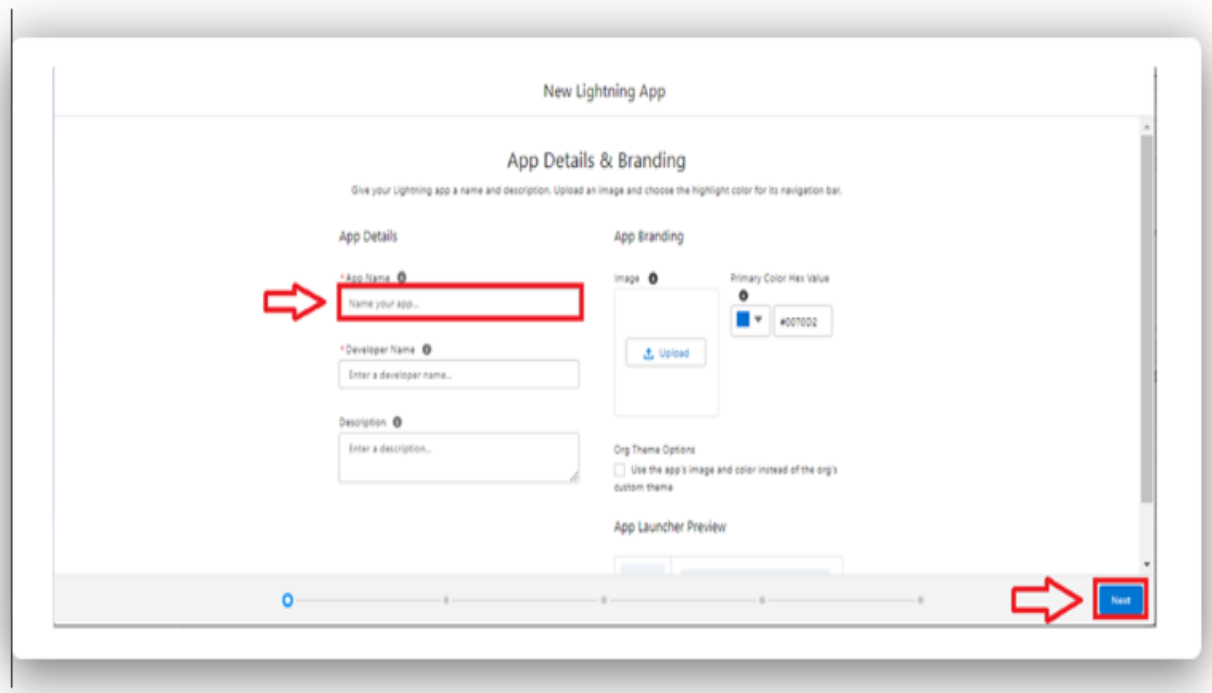
To create a lightning app page:

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

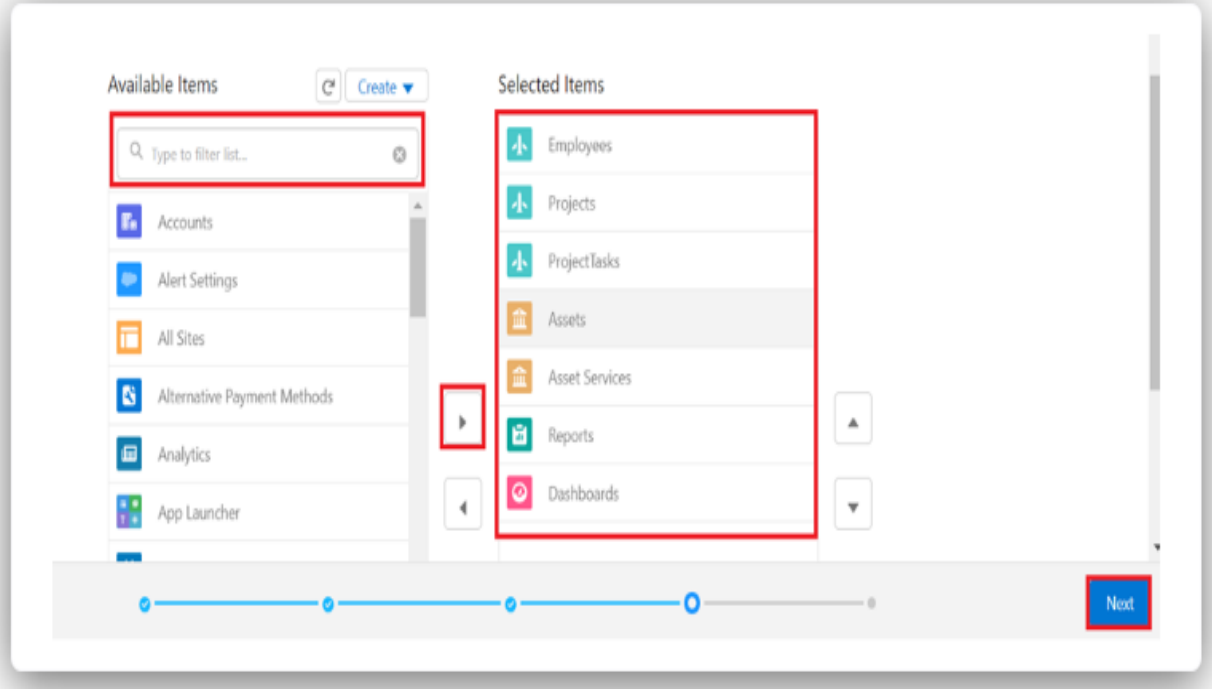


2. Fill the app name in app details and branding as follow
App Name : Workforce Administrator Solution
Developer Name : this will auto populated
Description : Give a meaningful description
Image : optional (if you want to give any image you can otherwise not mandatory)
Primary color hex value : keep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

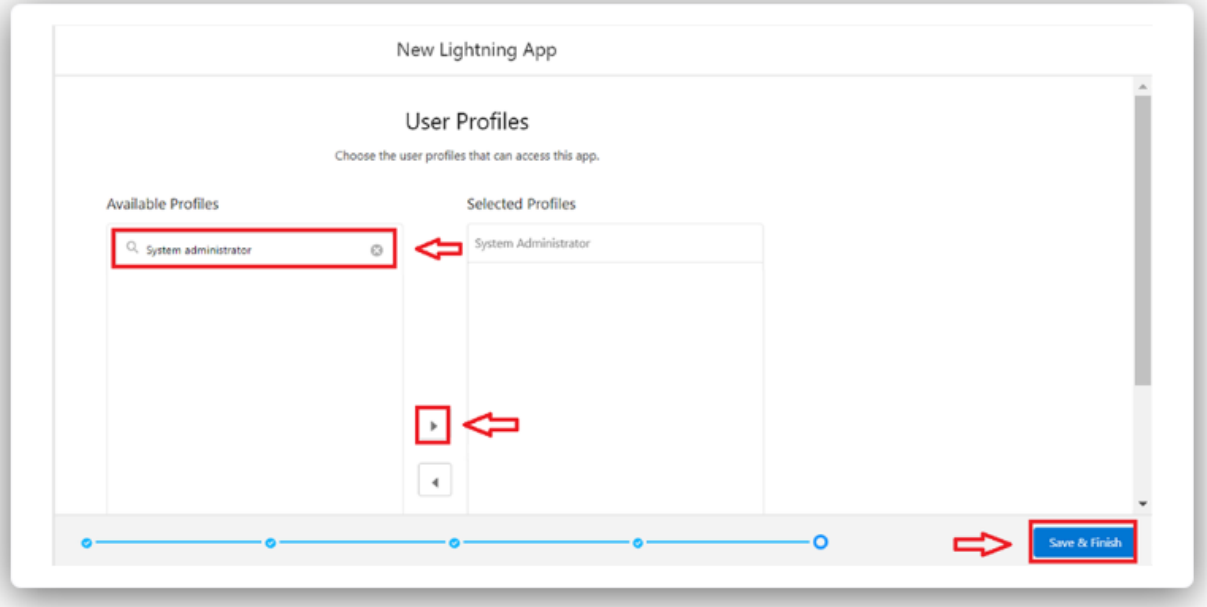
3. Then click Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.



4. To Add Navigation Items:



5. To Add User Profiles:

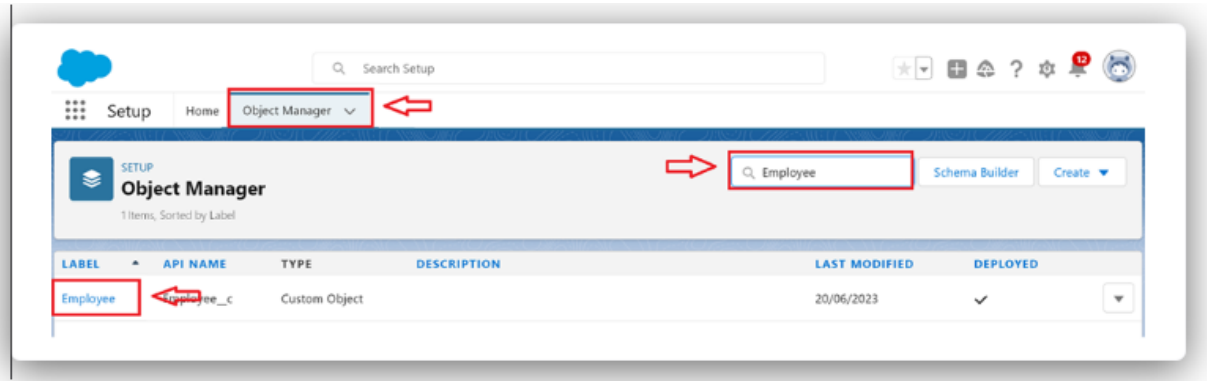


Search profiles (System administrator) in the search bar --> click on the arrow button --> save & finish.

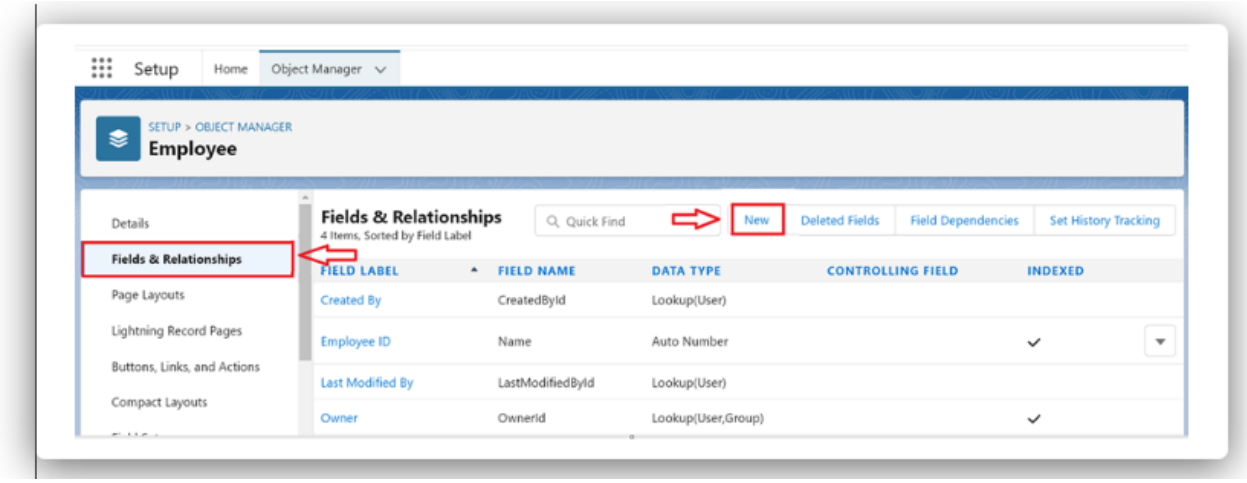
Activity 1 : Creating Text Field in Employee Object

To create fields in an object:

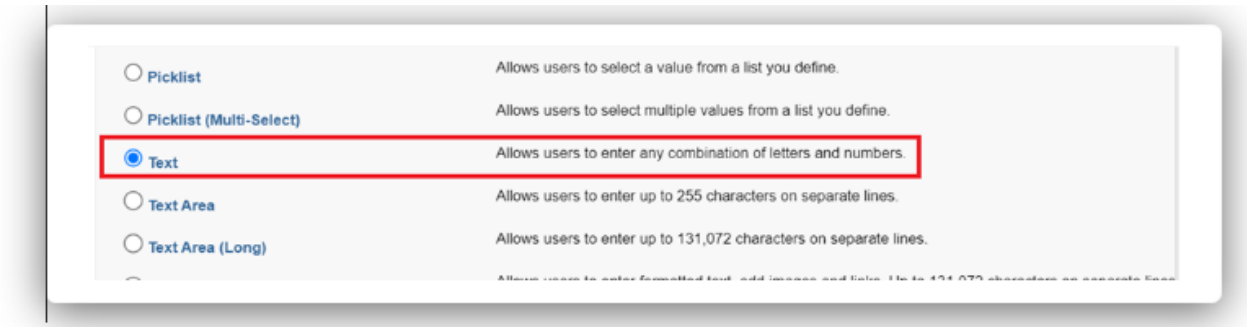
1. Go to setup --> click on Object Manager --> type object name(Employee) in quick find bar --> click on the object.



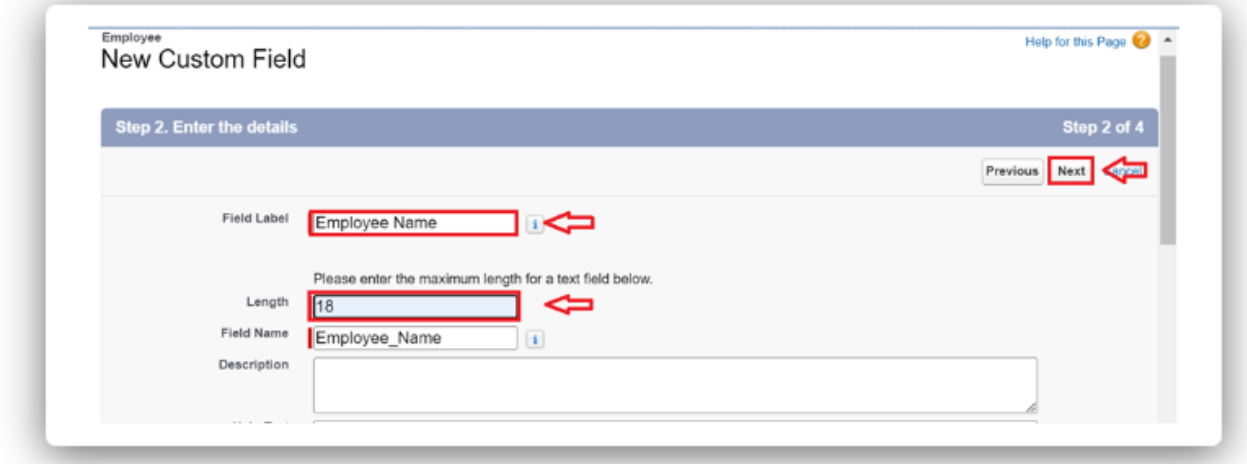
2. Now click on “Fields & Relationships” --> New



3. Select Data type as “Text”.



4. Click on Next

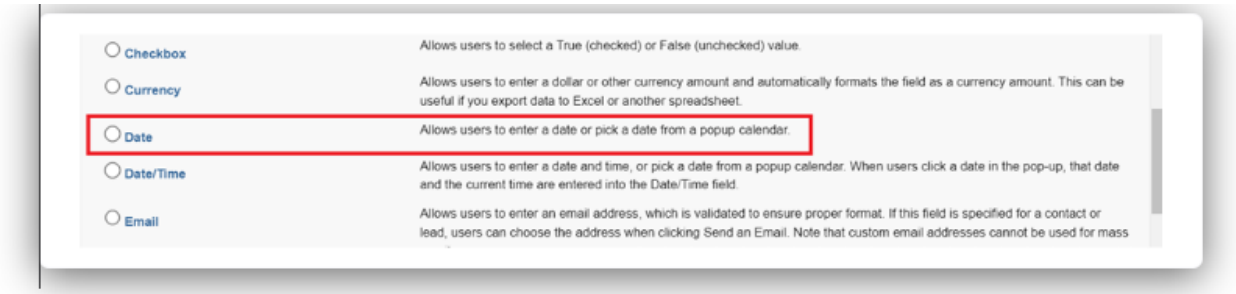


5. Fill the above as following:
   1 Field Label: Employee Name
   2 Length : 18
   3 Field Name : gets auto generated
   4 Click on Next --> Next --> Save and new

Activity 2 : Creating Date of Birth Field in Employee Object

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

.



3. Click on Next.

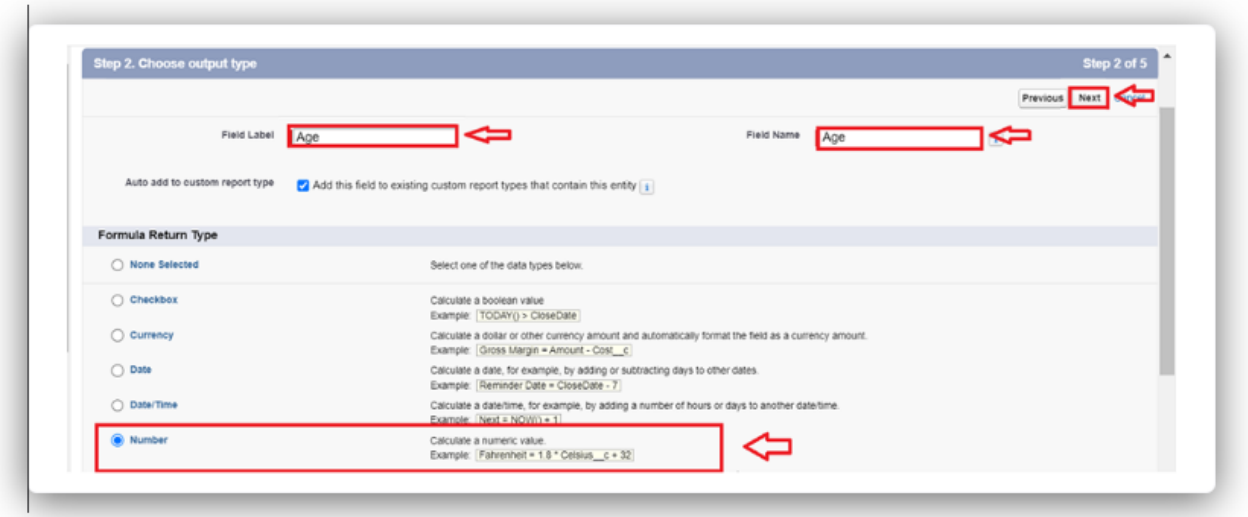
4. Fill the above as following:
    a. Field Label: Date of Birth.
    b. Field Name : gets auto generated.
    c. Click on Next --> Next --> Save and new.

Activity 3 : Creating Formula Field In Employee Object

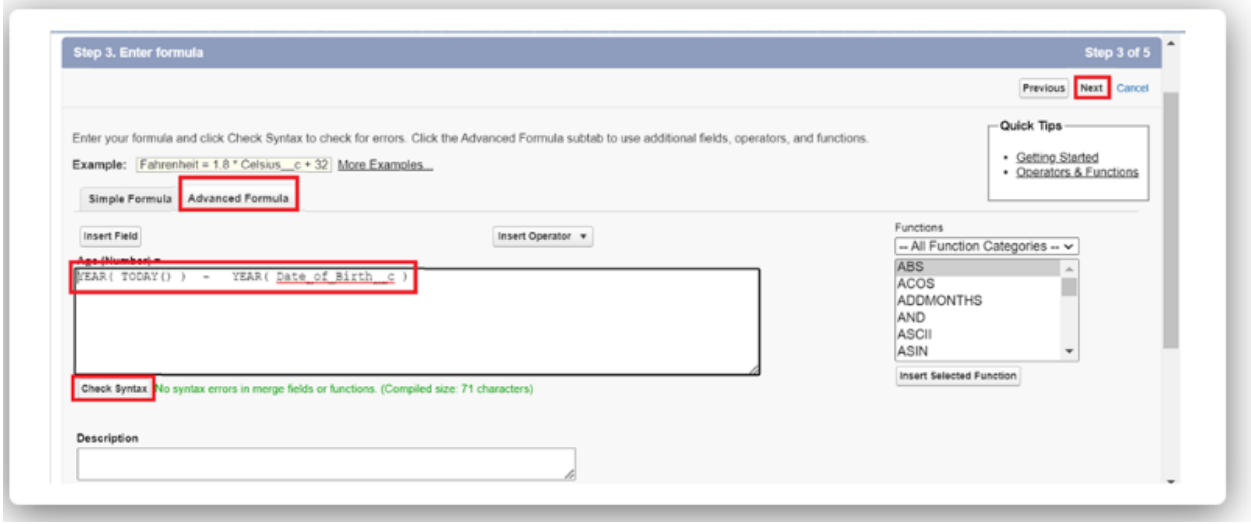
1. Repeat step 1 and 2 mentioned in activity 1

2. Select Data type as “Formula” and click Next.

3. Give Field Label and Field Name as “Age” and select formula return type as “Number” and click next.



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

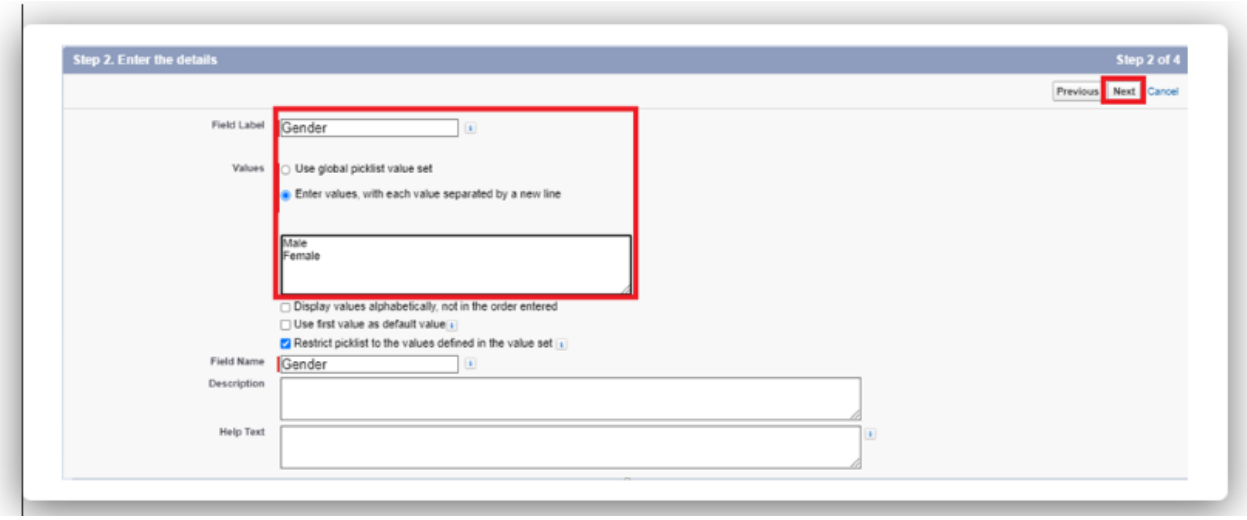


Activity 4 : Creating Picklist Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1

2. Select Data type as “Picklist” and click Next.

3. Enter Field Label as “Gender”, under values select “Enter values, with each value separated by a new line" and enter values as shown below.



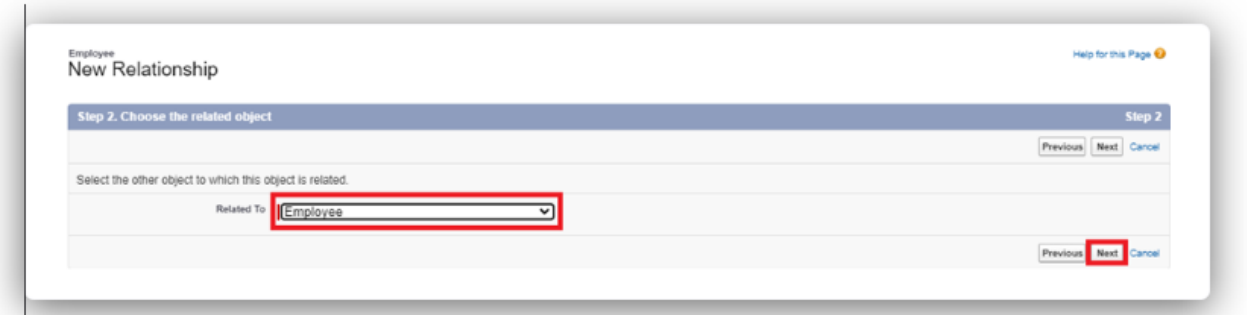
4. Click Next --> Next --> Next --> Save & New.

Activity 5 : Creating Self-Relationship Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1

2. Select Data type as “Lookup Relationship” and click Next.

3. Select Employee from the drop down related to the field and click Next.



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

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

To Create a Master-Detail relationship

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

Activity 7 : Creating Remaining Fields in Employee Object

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

<table>
<tr><th>Sl No</th><th>Object Name</th><th>Field</th></tr>
<tr><td></td><td></td><td>
<table>
<tr><th colspan="2">Field Name</th><th>Data type</th></tr>
<tr><td>1</td><td>Qualification</td><td>Text</td></tr>
<tr><td>2</td><td>Address</td><td>Text Area</td></tr>
<tr><td>3</td><td>Experience</td><td>Text Area</td></tr>
<tr><td>4</td><td>Phone no</td><td>Phone</td></tr>
<tr><td>5</td><td>Email</td><td>Email</td></tr>
<tr><td>6</td><td>Joining date</td><td>Date</td></tr>
</table>
</td></tr>
</table>

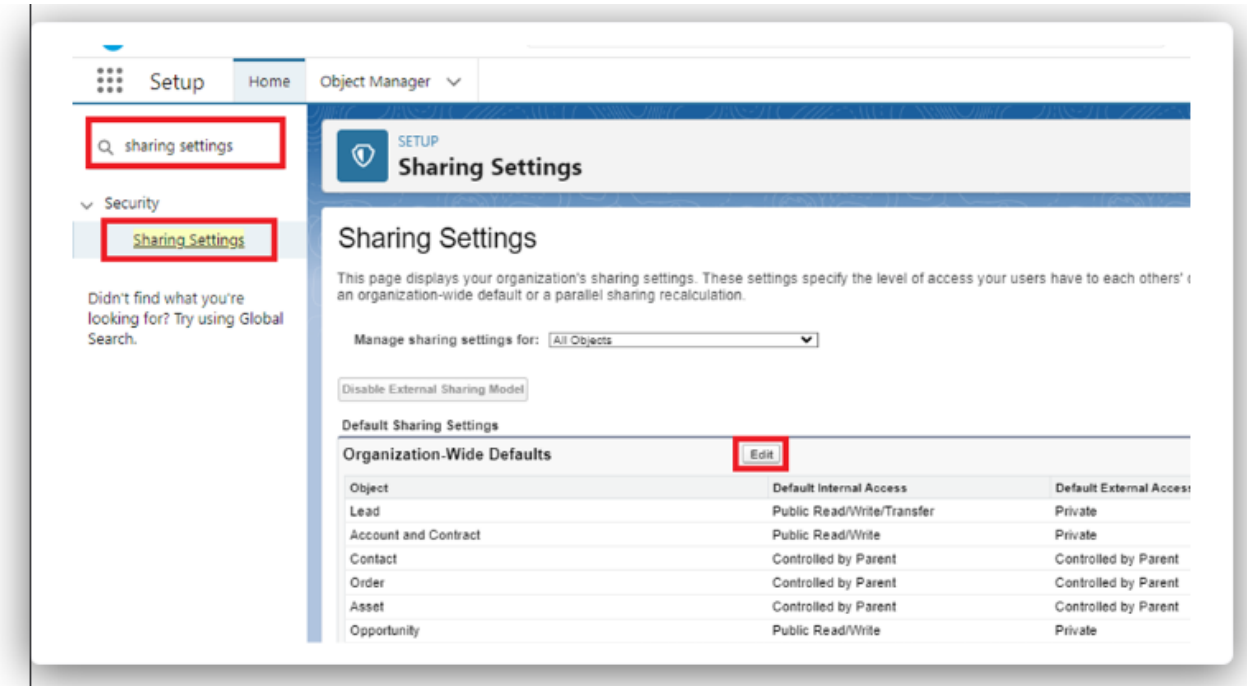
<table>
<tr>
<td>1</td>
<td>Employee</td>
<td>
<table>
<tr><td>7 Mode of Work</td><td>Picklist: Values
On Site
Remote</td></tr>
<tr><td>8 Cab Allowance</td><td>Check box</td></tr>
<tr><td>9 Food Allowances</td><td>Check box</td></tr>
<tr><td>10 Wifi Allowances</td><td>Check box</td></tr>
<tr><td>11 Cab Allowance Amount</td><td>Currency</td></tr>
<tr><td>12 Food Allowance Amount</td><td>Currency</td></tr>
<tr><td>13 Wifi Allowance Amount</td><td>Currency</td></tr>
<tr><td>14 Login Time</td><td>Time</td></tr>
<tr><td>15 Logout Time</td><td>Time</td></tr>
<tr><td>16 LinkedIn Profile</td><td>url</td></tr>
</table>
</td>
</tr>
<tr>
<td>2</td>
<td>Project</td>
<td>
<table>
<tr><th>Field Name</th><th>Data type</th></tr>
<tr><td>1 Project Name</td><td>Text</td></tr>
<tr><td>2 Project Lead</td><td>Text</td></tr>
<tr><td>3 Start Date</td><td>Date</td></tr>
<tr><td>4 End Date</td><td>Date</td></tr>
<tr><td>5 Project Status</td><td>Picklist: Values</td></tr>
</table>
</td>
</tr>
</table>

			Completed On Going Not Yet Started

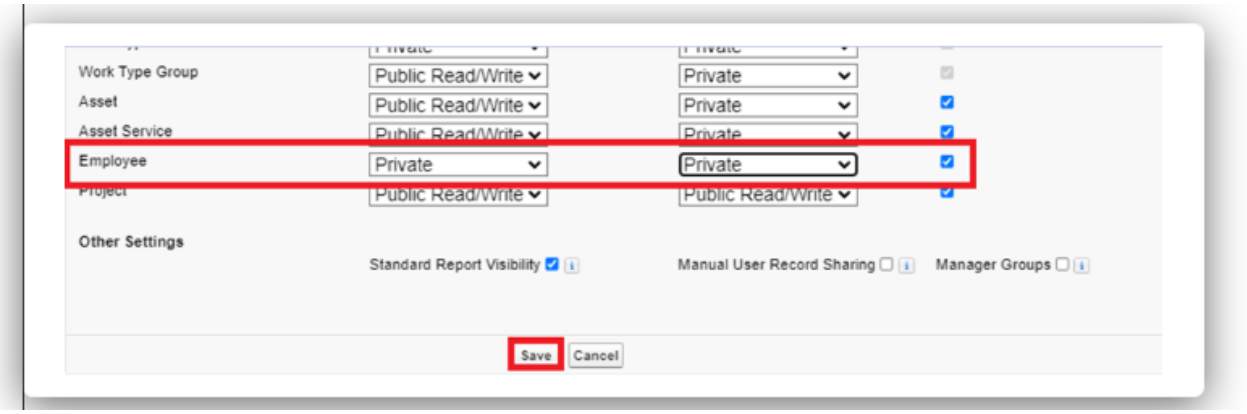
Setting OWD

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.



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

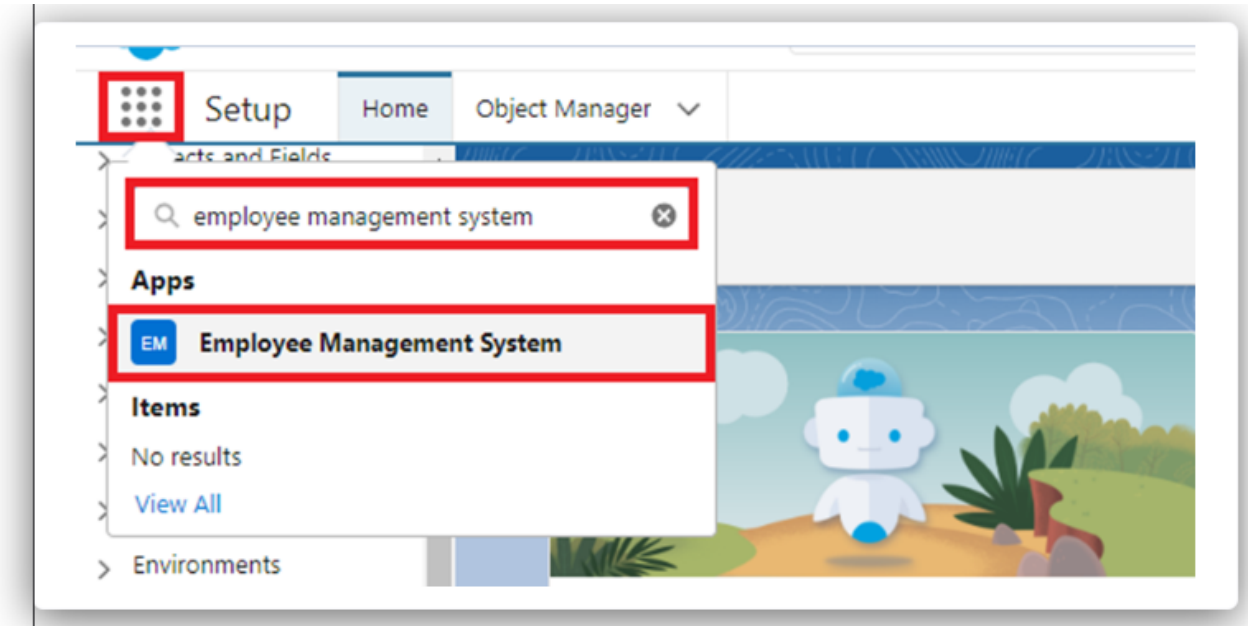


1. This Setting is for all the Users Which have been Created.

Activity 2:

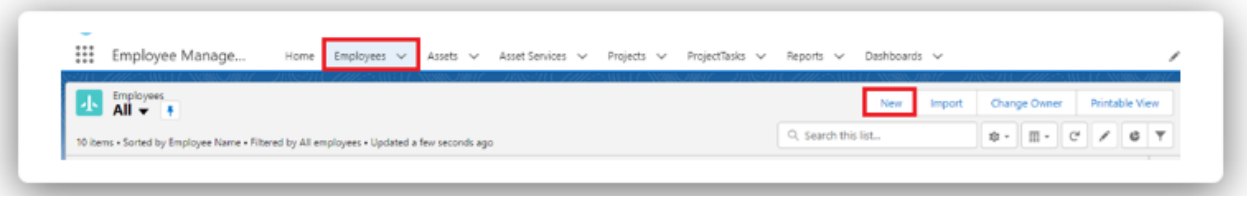
Set OWD as Private for Project and Asset Service objects.

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



1. Click on the Employee tab.

2. Click New.



1. 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

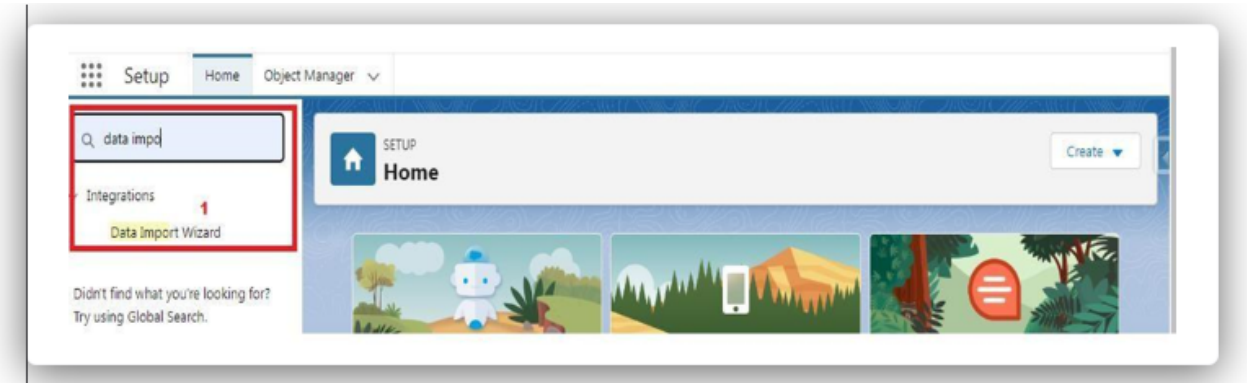
Activity 3: Delete a Record (Employee)

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.

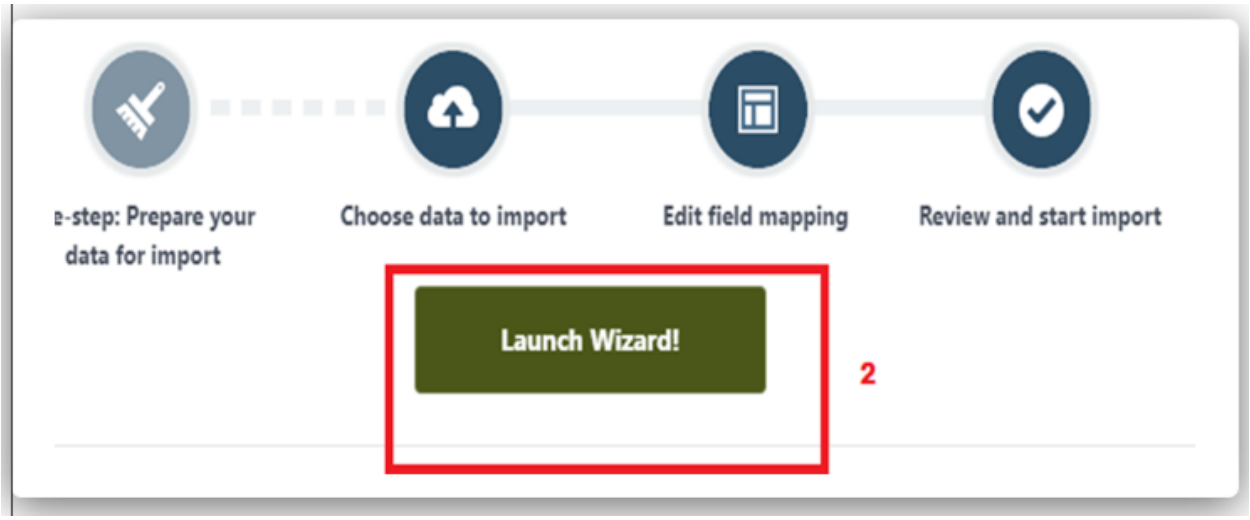
Import Data

Activity-1: Importing data using Data Wizard

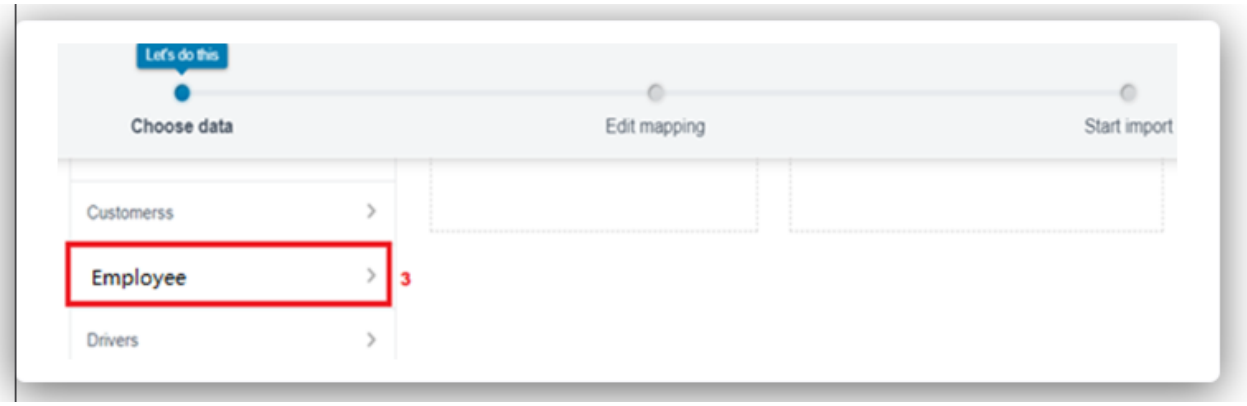
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



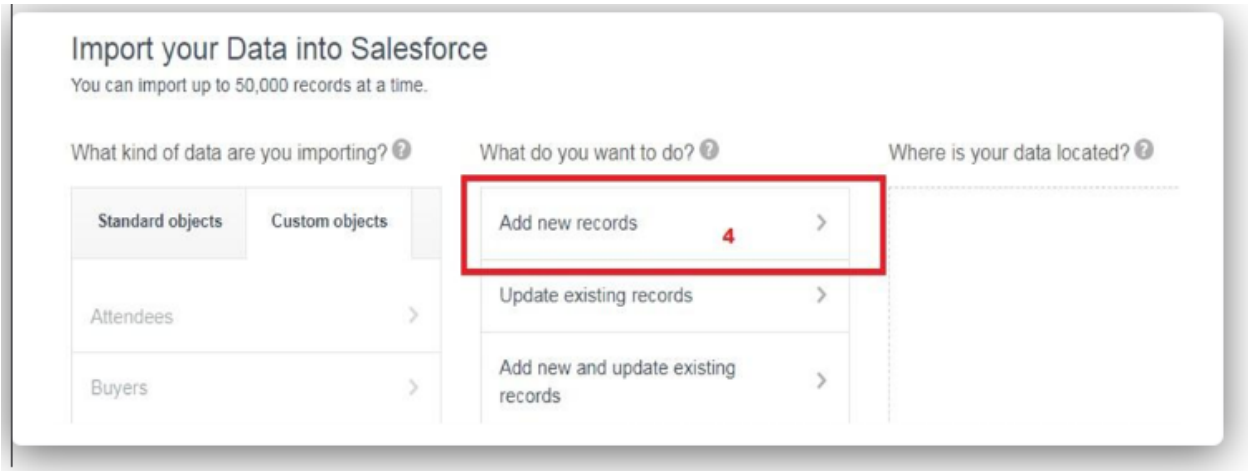
03 Click Launch Wizard!



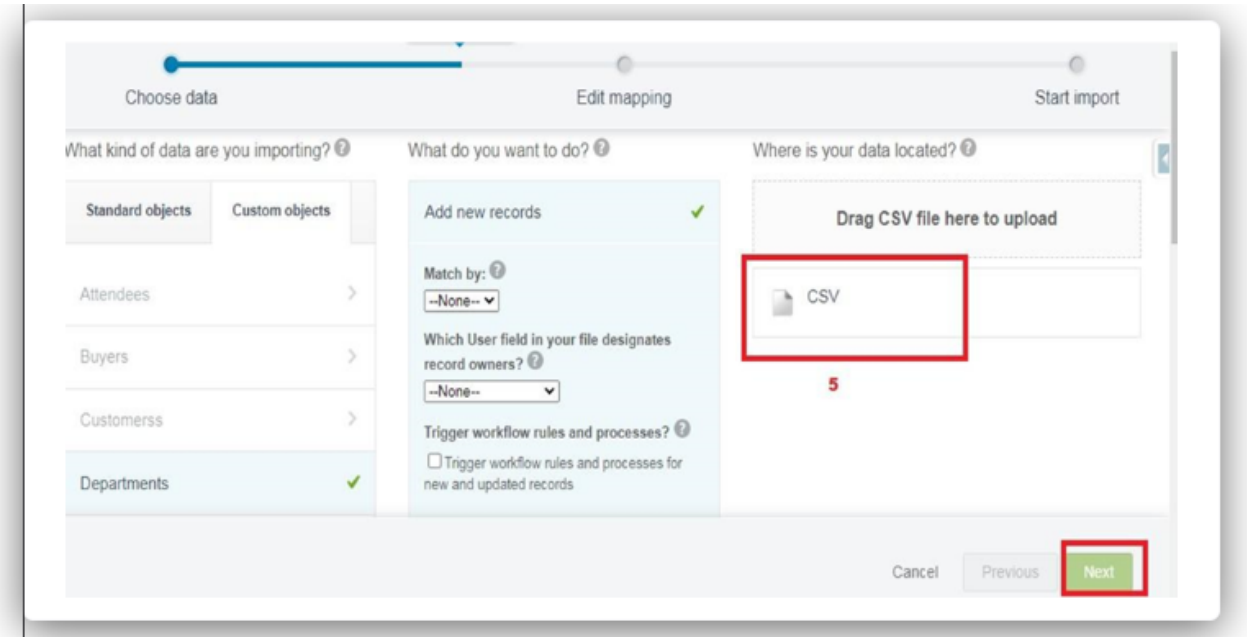
04 Click the Custom Objects tab and select the Employee object.



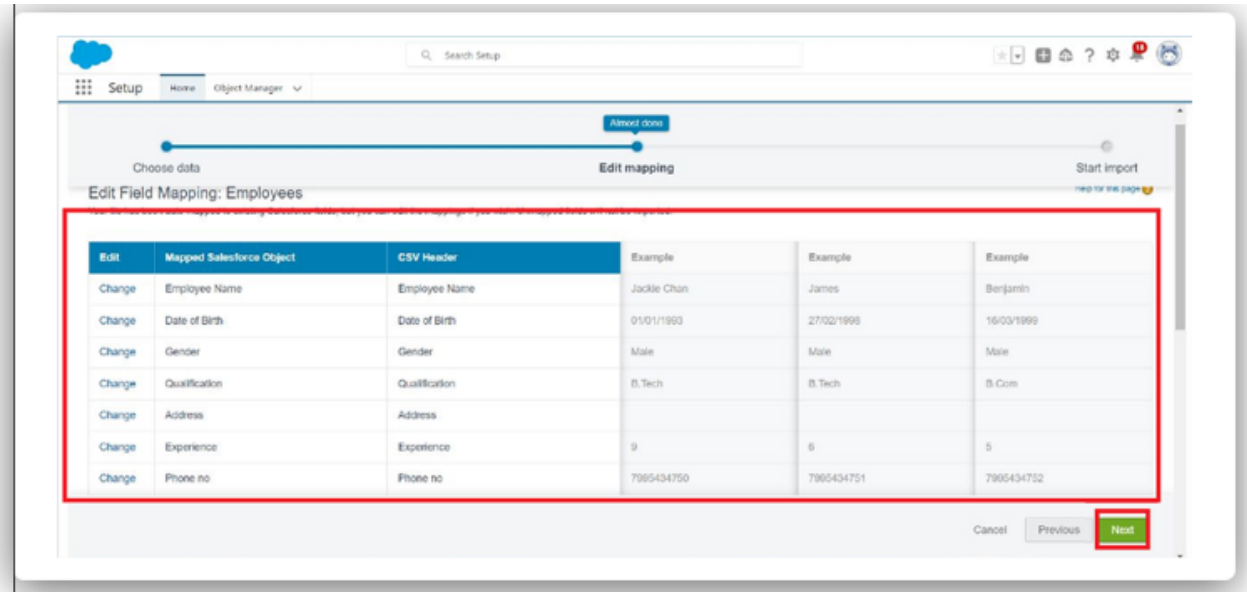
05 Select Add new records.



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

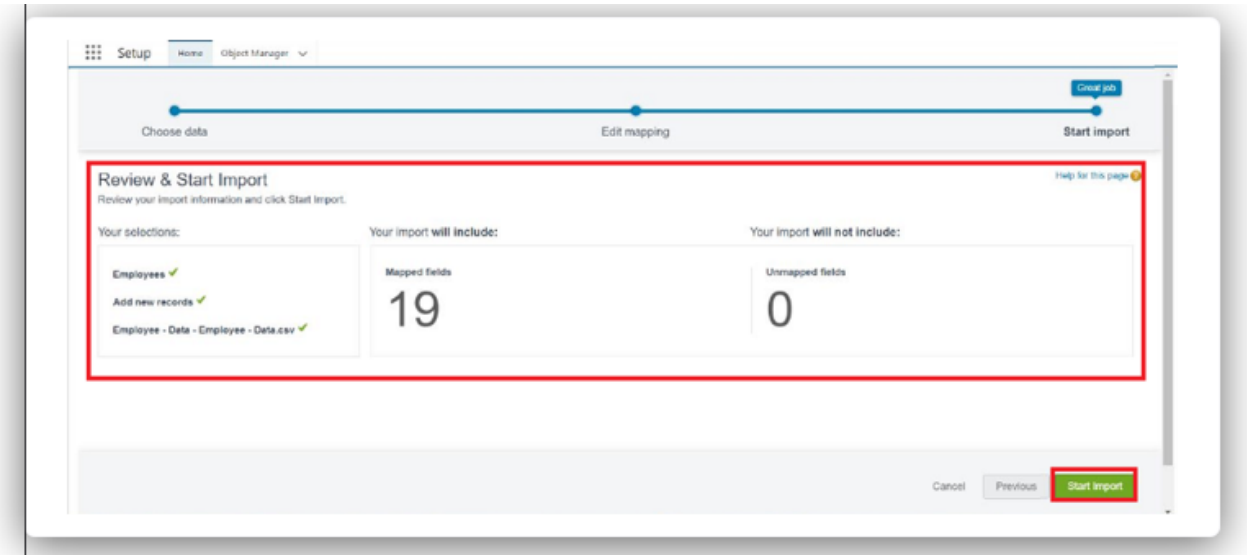


07 Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.

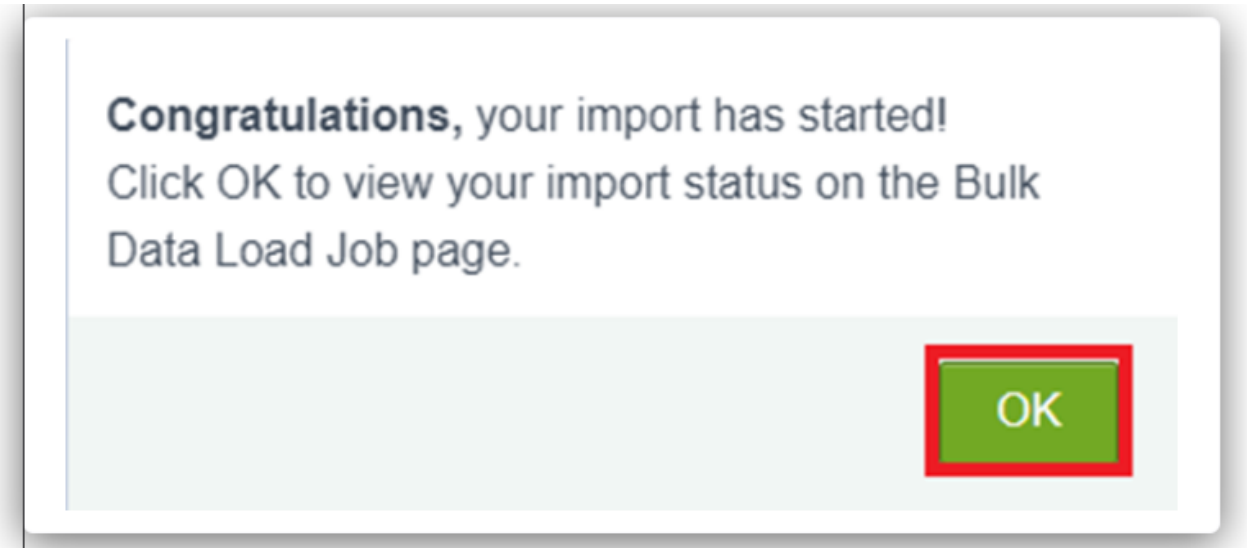


Note: no need to map “Reports to” field. The Data Import Wizard is designed to handle basic data import tasks and does not support mapping relationships between records

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



09 Click OK on the popup.



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

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

Profiles

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

Types of profiles in salesforce

1. Standard profiles:

   By default salesforce provides below standard profiles.

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

   We cannot deleted standard ones

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

2. Custom Profiles:

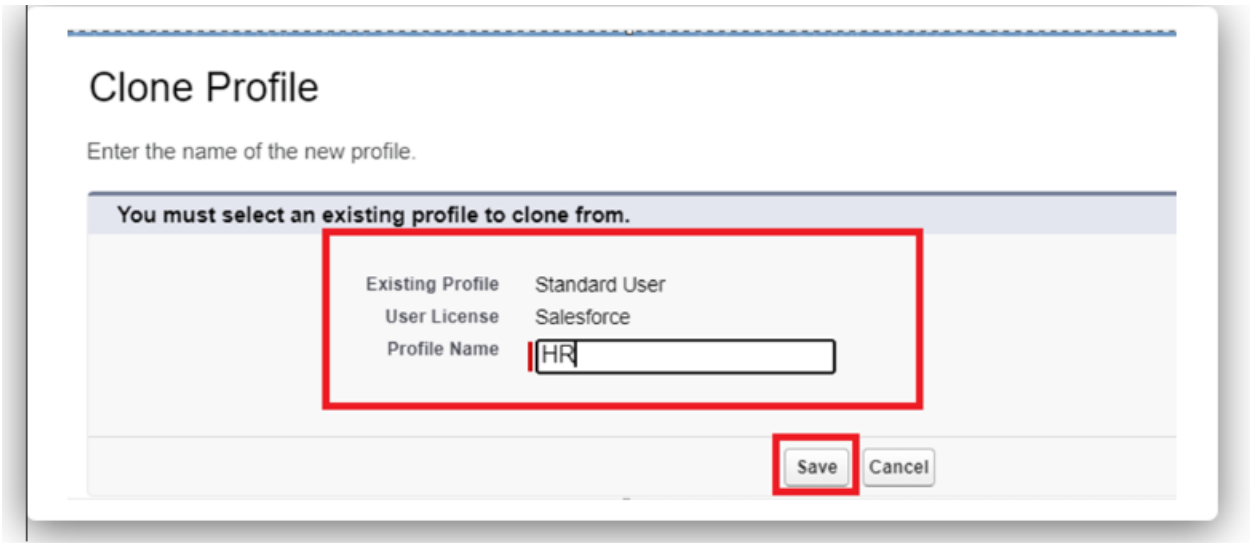
   Custom ones defined by us.

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

Activity 1: HR Profile

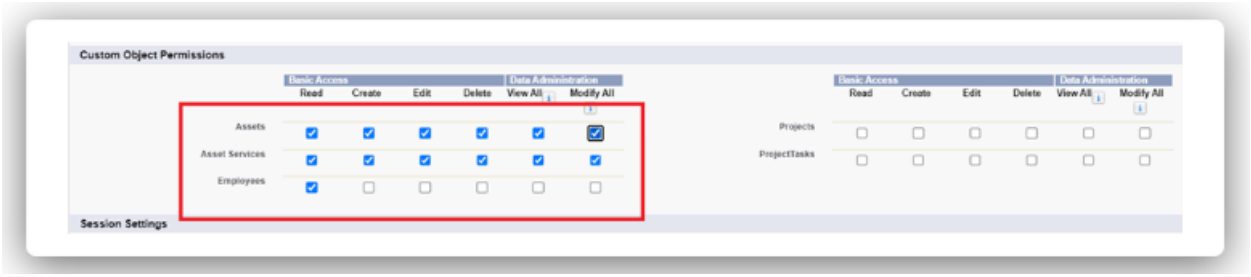
To create a new profile:

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



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

3. Scroll down to Custom Object Permissions and Give access permissions for Assets and Asset Services objects.



4. Scroll down and Click on Save.

Activity 2: Manager Profile

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

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

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

4. Scroll down and Click on Save.

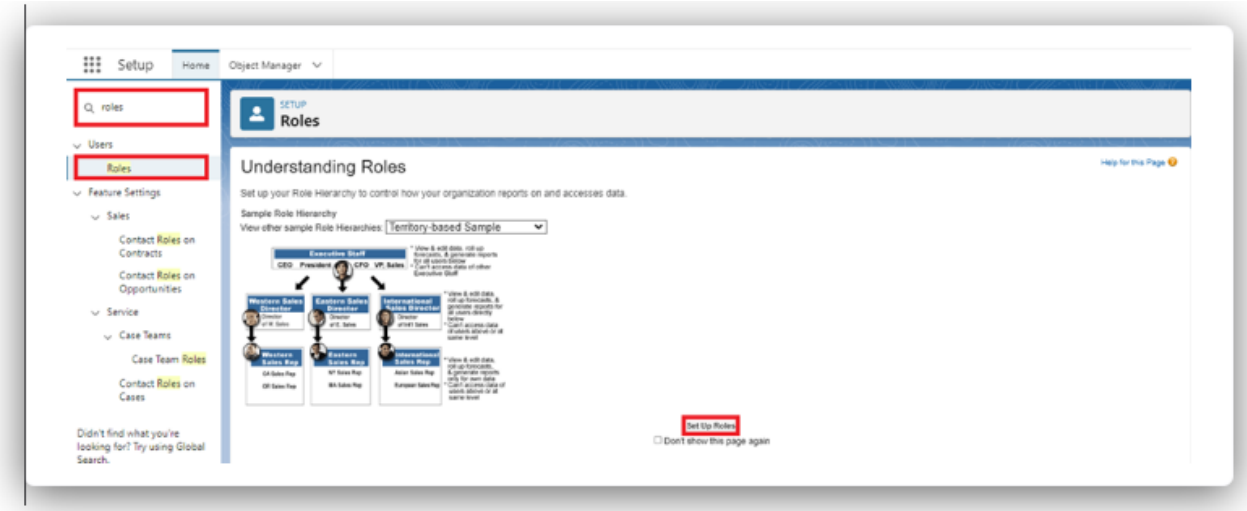
Activity 3: Create Employee Profile

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

Role

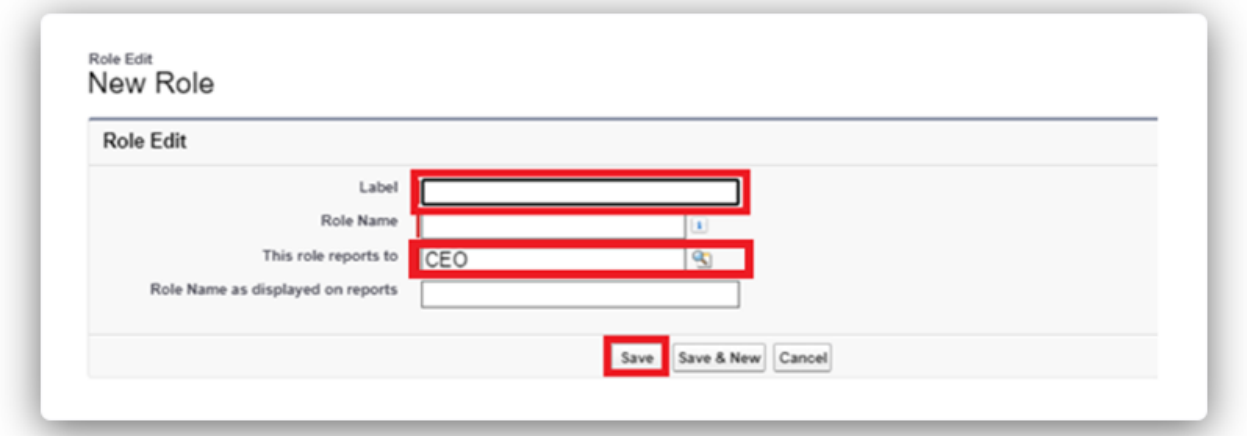
Activity 1: Creating HR Role

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

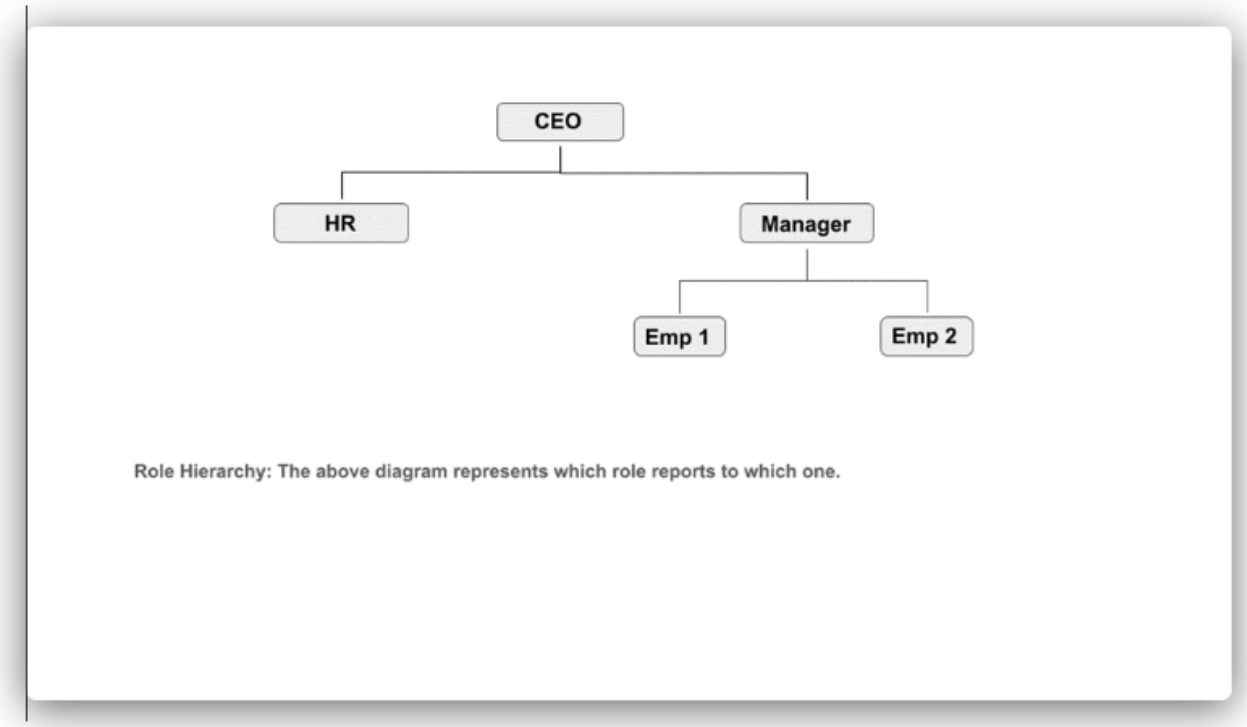


2. Click on Expand All and click on add role under whom this role works.2. Click on Expand All and click on add role under whom this role works.

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.

Users

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

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

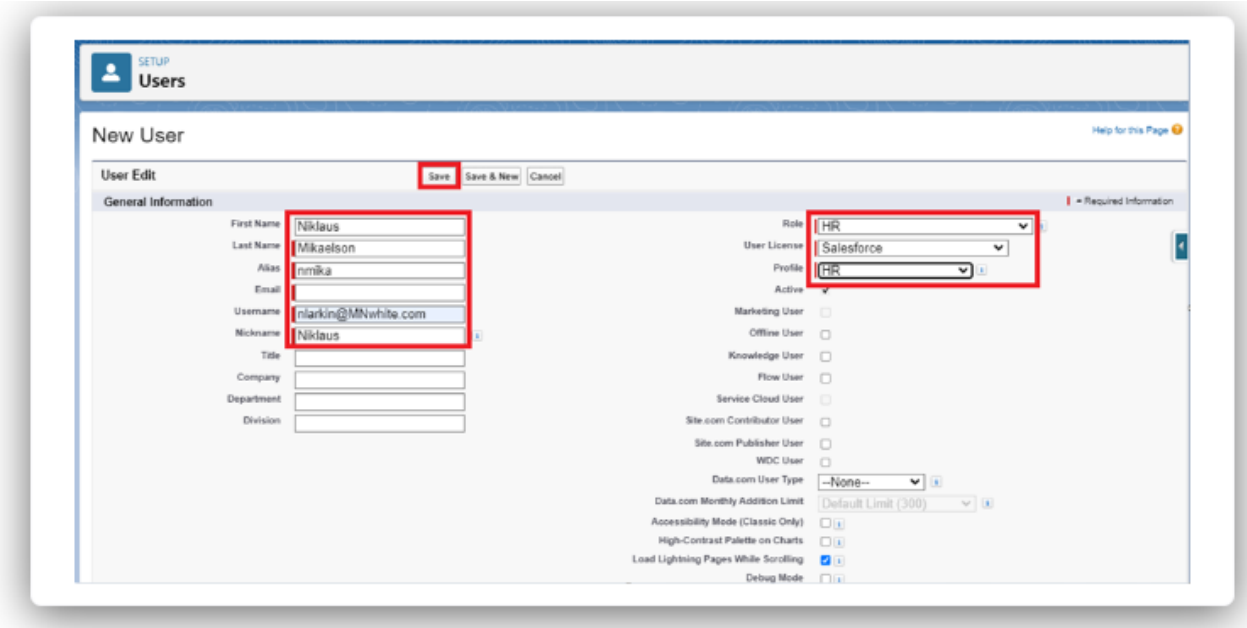
1. Username
2. Email Address
3. User's First Name (optional)
4. User's Last Name
5. Alias
6. Nickname
7. License
8. Profile
9. Role (optional)

Activity 1: Create User

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

2. Fill in the fields
    1. First Name : Niklaus
    2. Last Name : Mikaelson
    3. Alias : Give a Alias Name
    4. Email id : Give your Personal Email id
    5. Username : Username should be in this form: text@text.text
    6. Nick Name : Give a Nickname

7. Role : HR
8. User license: Salesforce
9. Profiles : HR



3. Save.

Activity 2: Creating another user

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

Activity 3: Creating more users

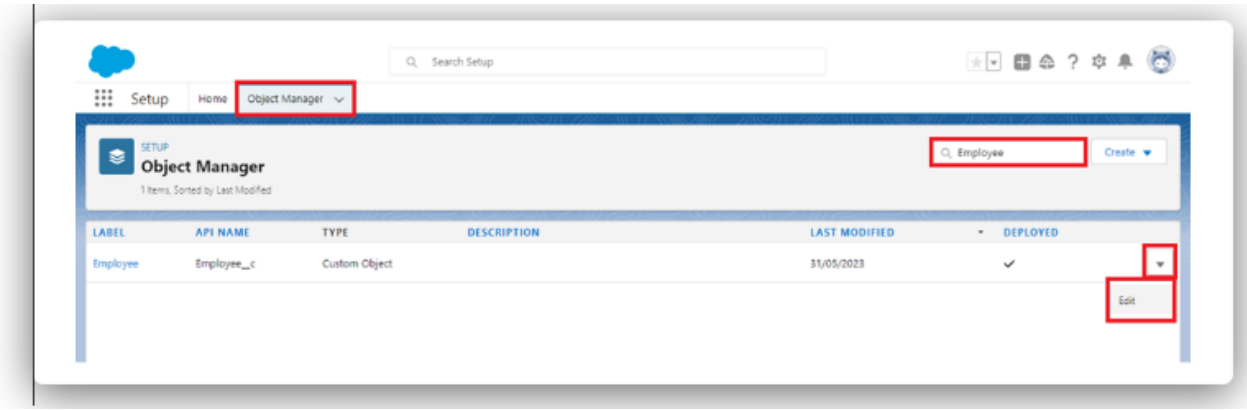
Create two more users as we created in activity 2.

Page layouts

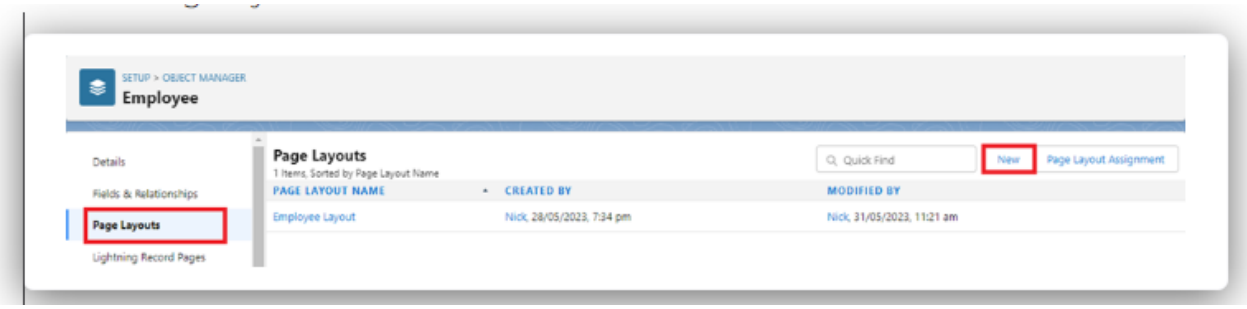
Activity 1 : creating a page layout for Employee object

To Create a Page layout:

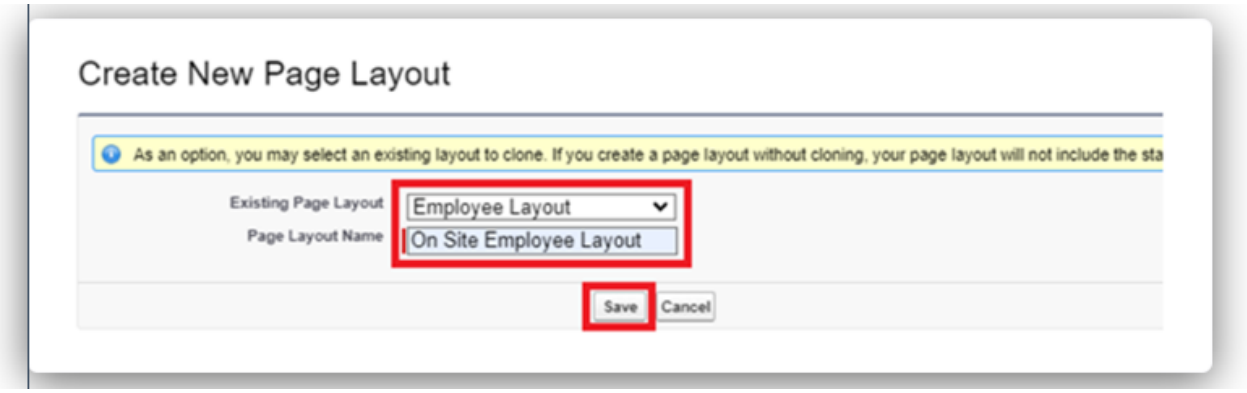
1. Go to Setup --> Click on Object Manager --> Search for the object (Employee) --> From drop down click on Edit



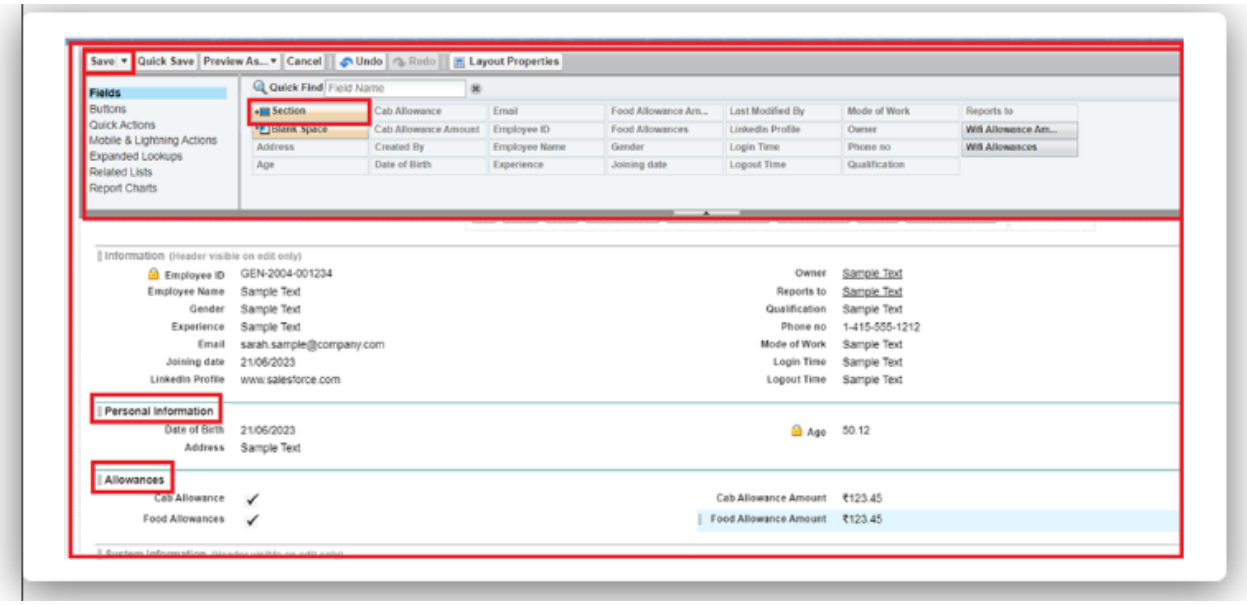
2 Click on Page layout --> Click on New



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



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



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

Activity 2 : Creating another page layout

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

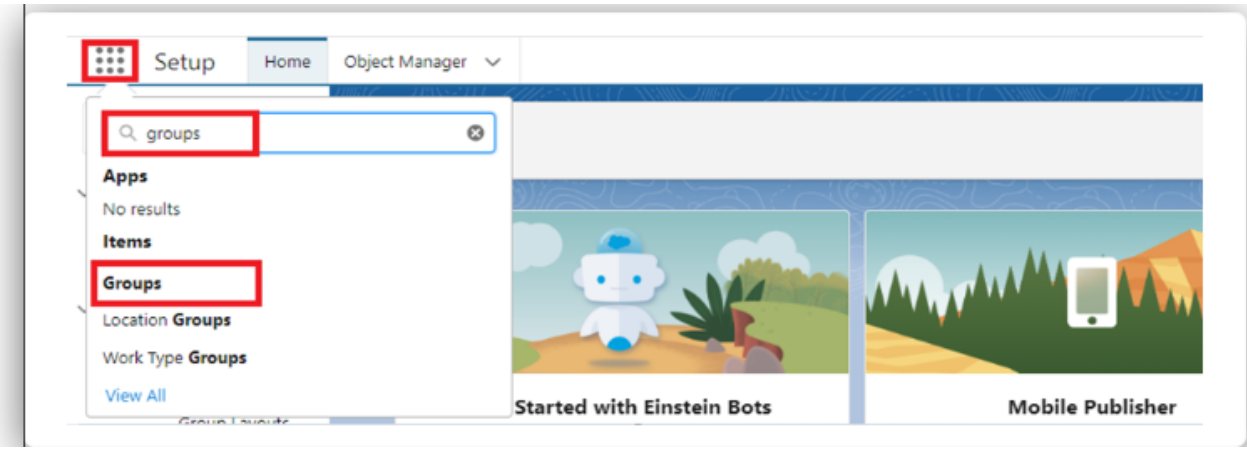
Chatter Group

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

Activity 1 : Creating a chatter group for your organization.

To Create a chatter group:

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

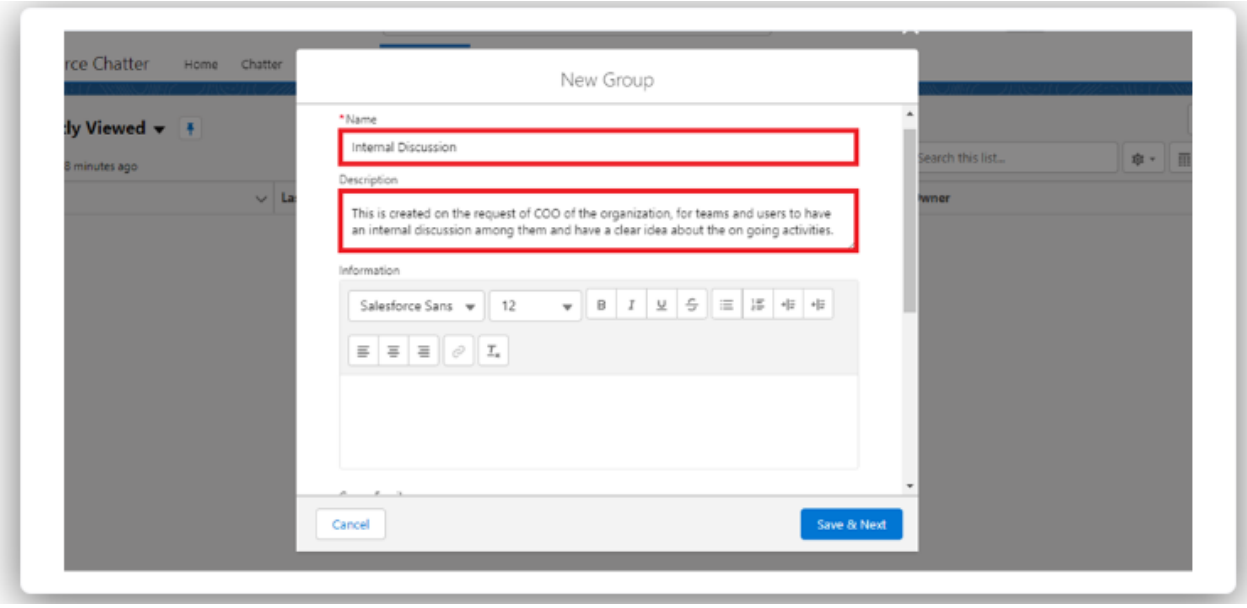


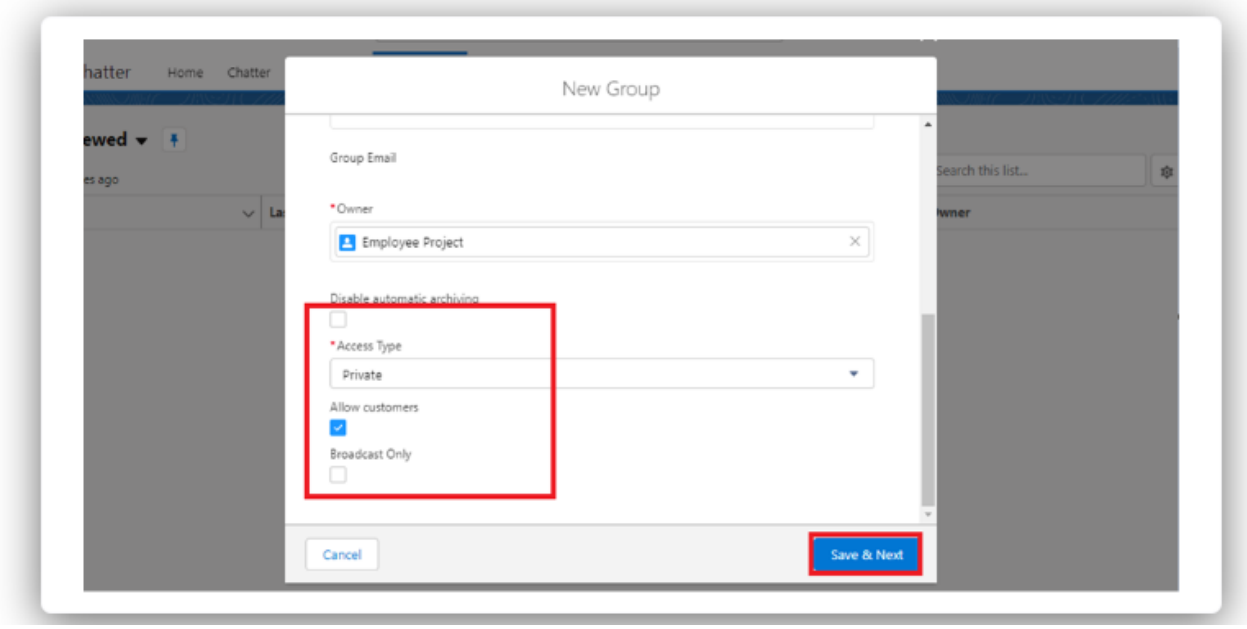
3 Click New

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

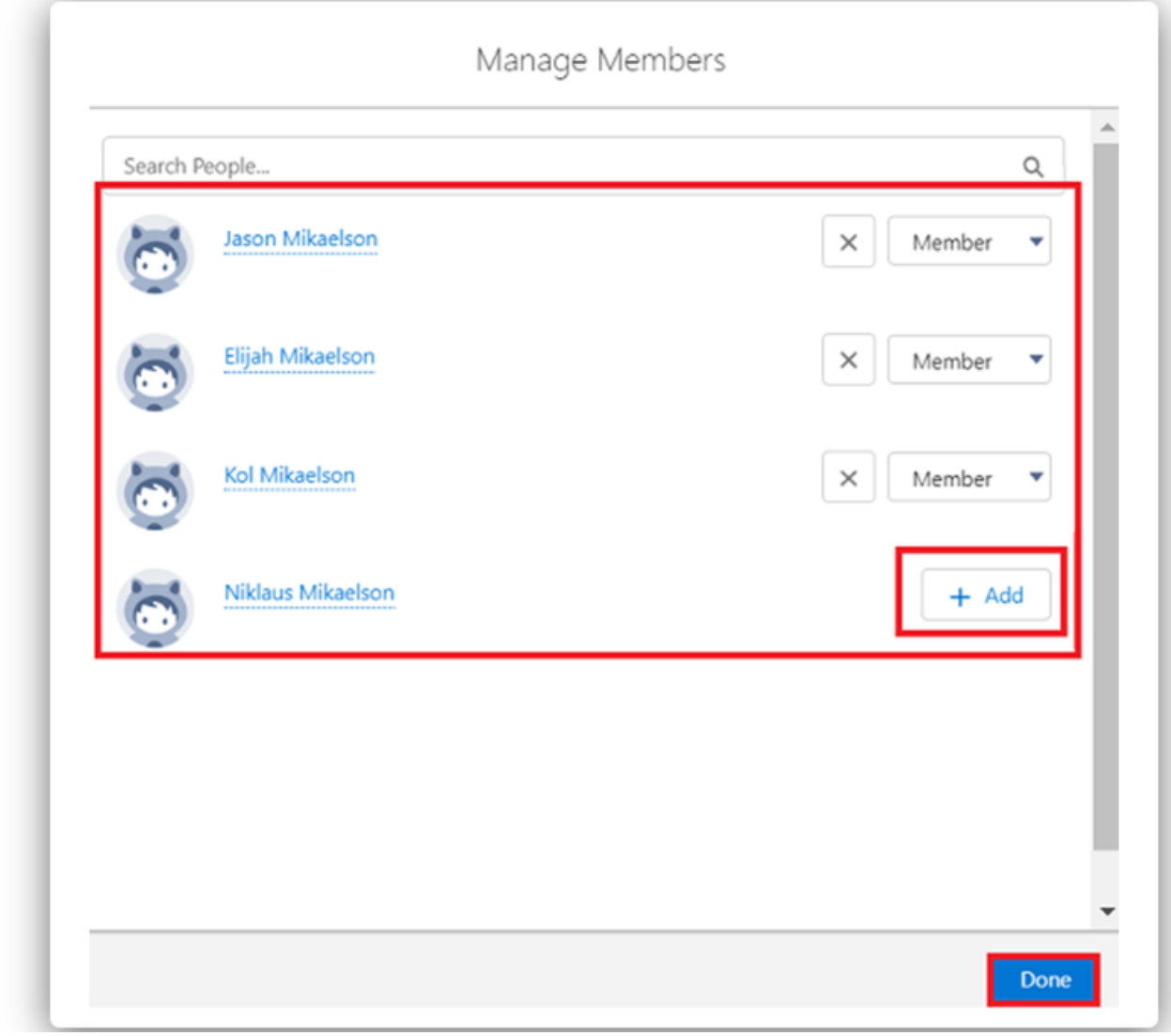
Field	Value
1 Group Name	Internal Discussion
2 Description	Give a understanding Description on your own

3	Access Type	Private
4	Allow Customers	Checked





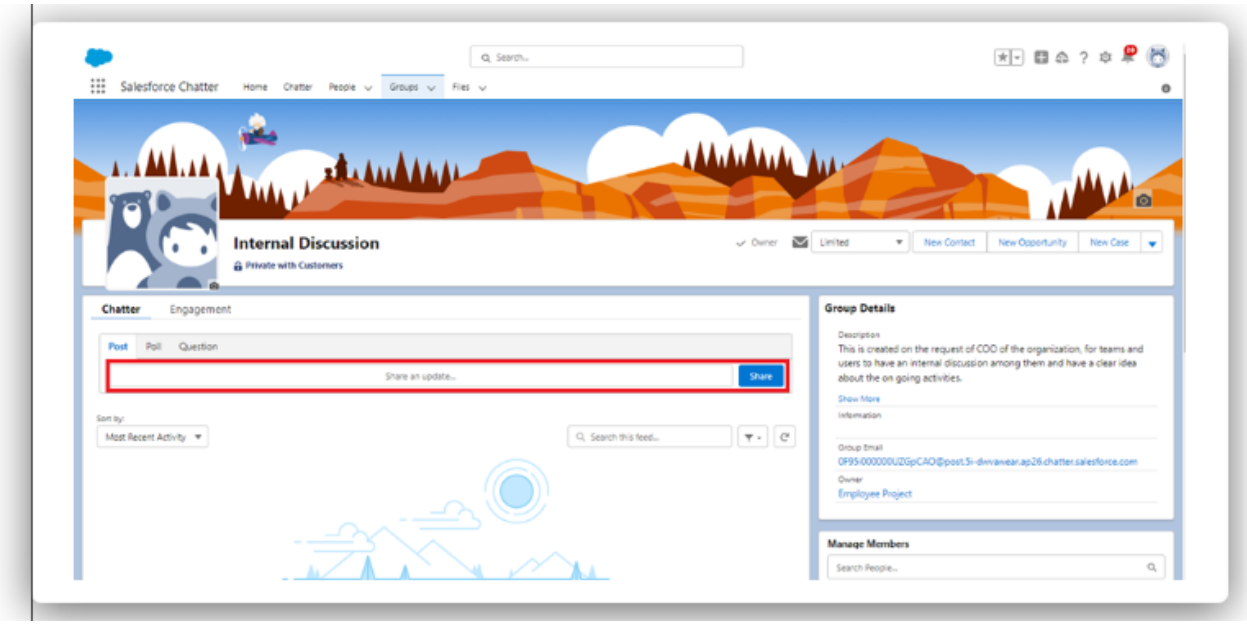
5. Click Save & Next. Skip the Upload Picture section and click Next.
6. On the Manage Members screen, click Add next to users you created in the previous activity.



Click Done.

7. This is how your group interface looks like.
8. 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.
9. Click Share.
   Note: You can like or comment on this post.

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



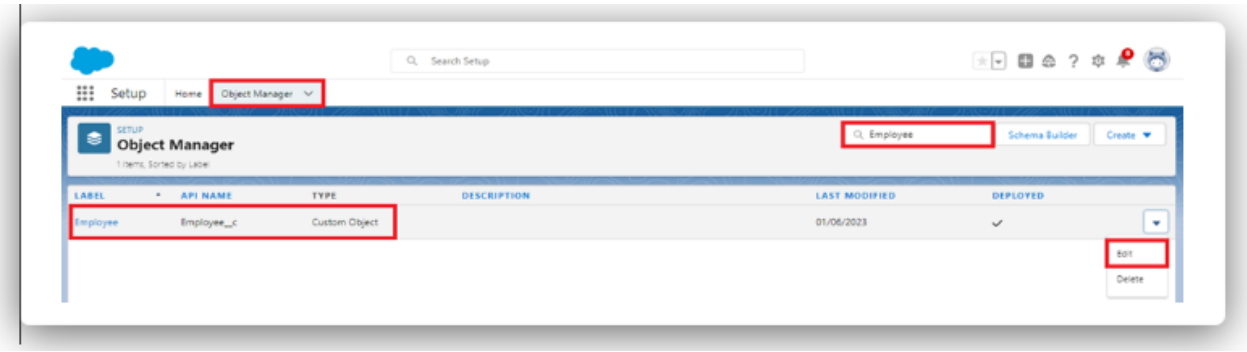
Record Types

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

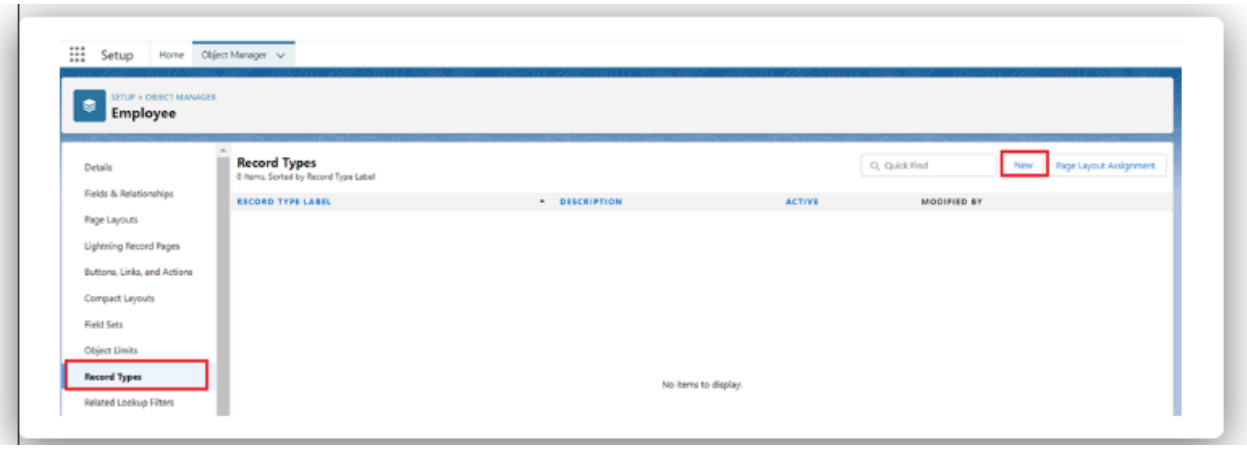
Activity 1: Creating On Site Employee Record Type

To create a Record Type:

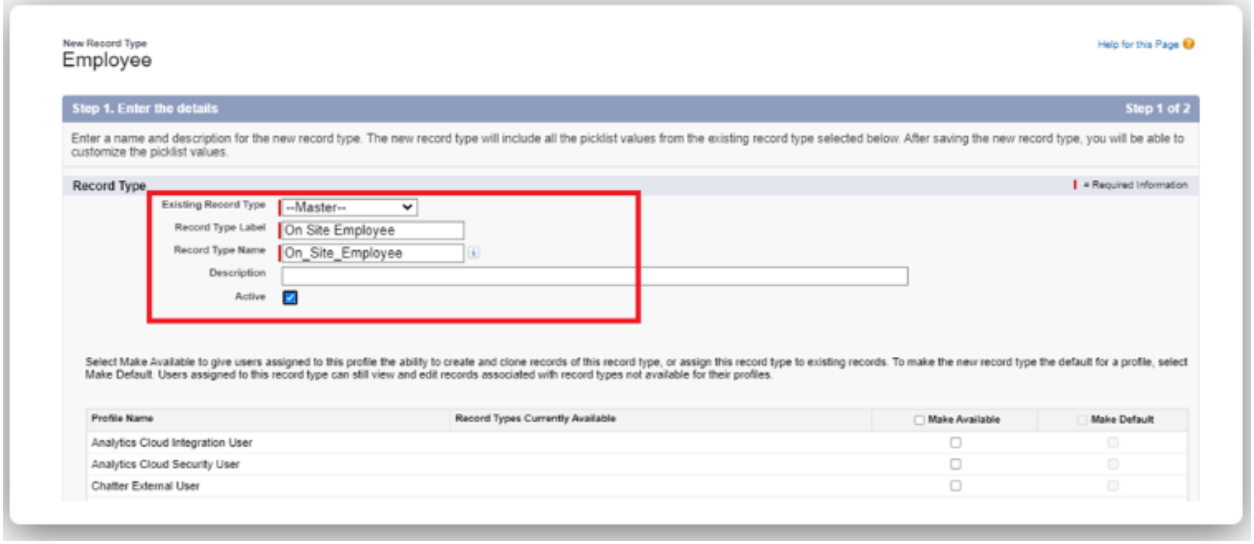
1. Go to Setup --> click on Object Manager --> Search for the object (Employee) --> from drop down click Edit.



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



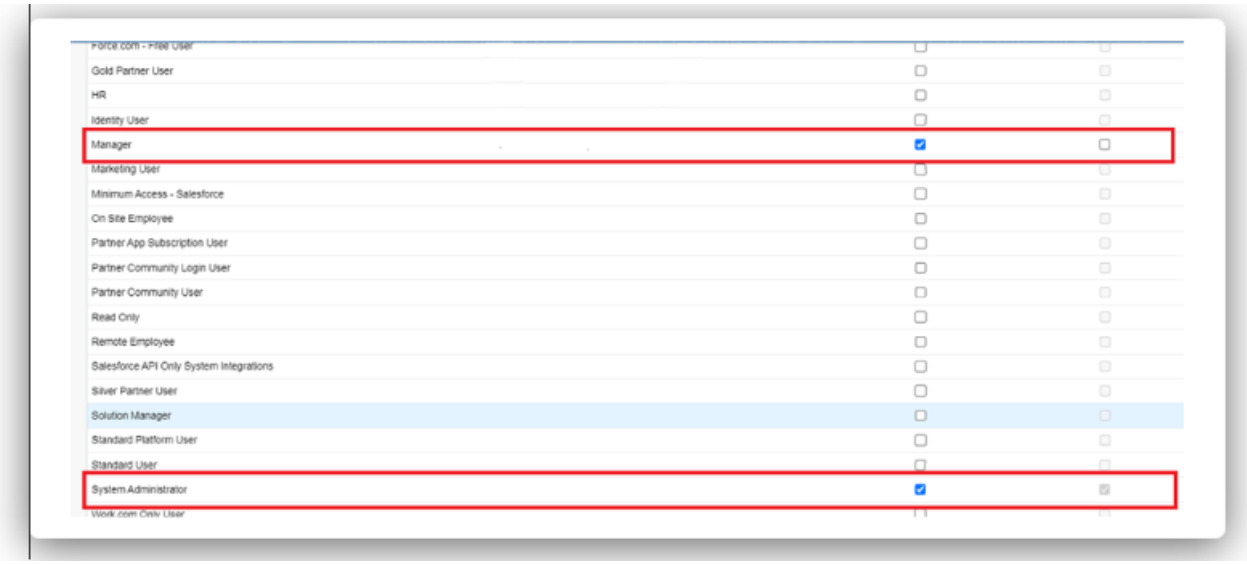
3. Give Record Type Label as “On Site Employee” and make it active.



4. Uncheck for “Make Available”

.

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



Activity 2: Creating "Remote Employee" Record Type

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

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

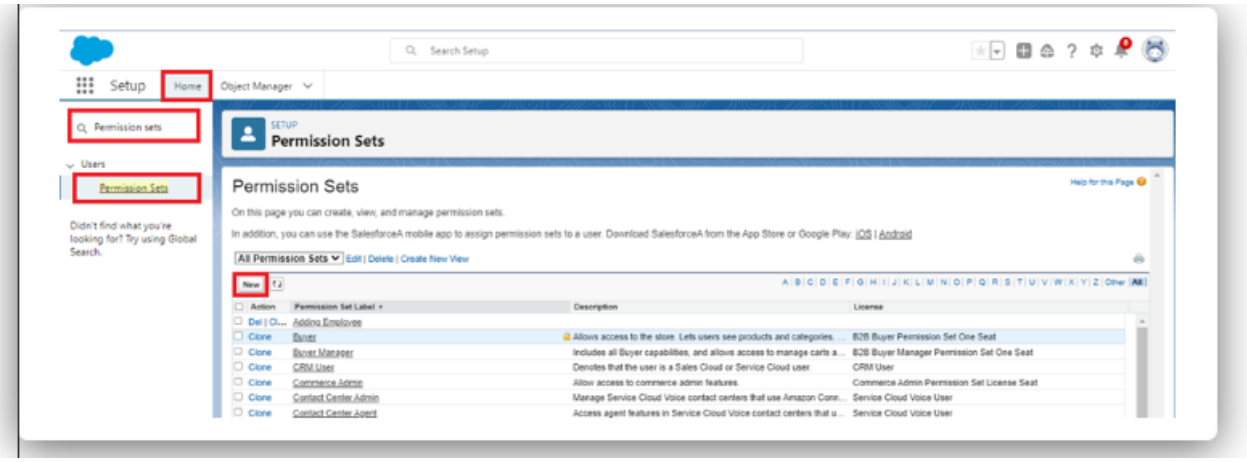
Permission sets

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

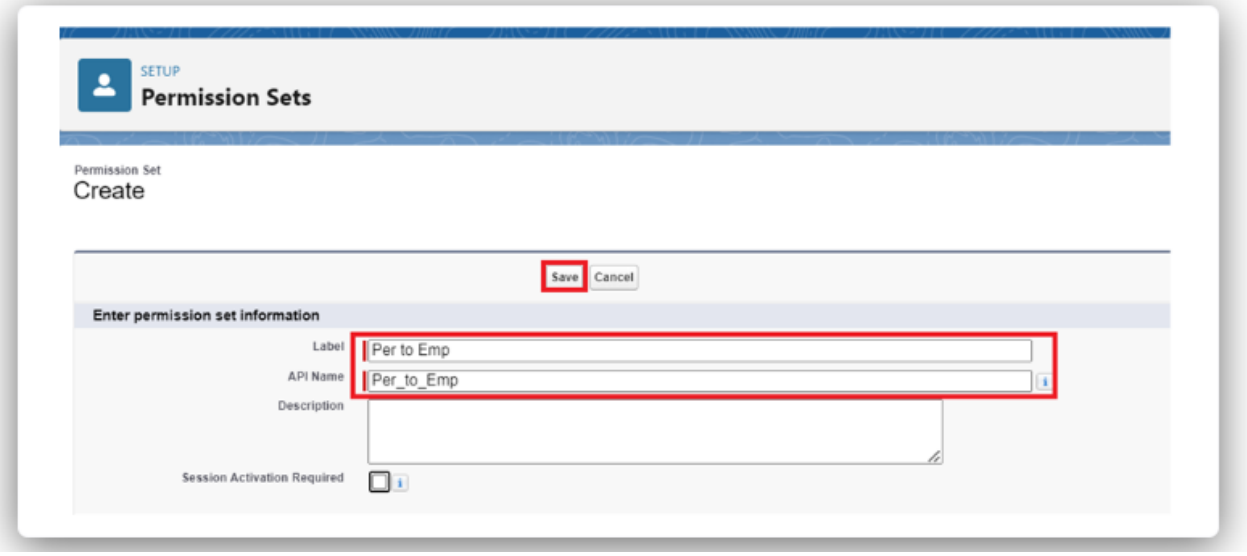
Activity 1: Creating a permission set

To Create a Permission Set:

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



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

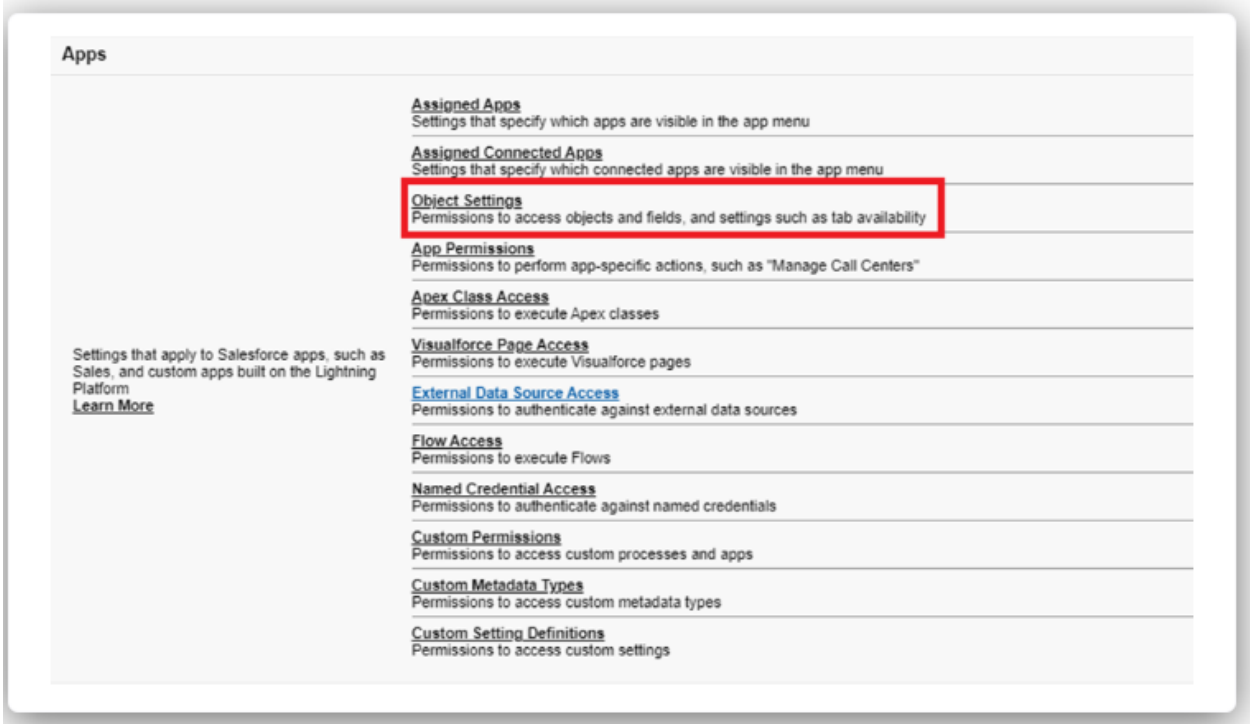


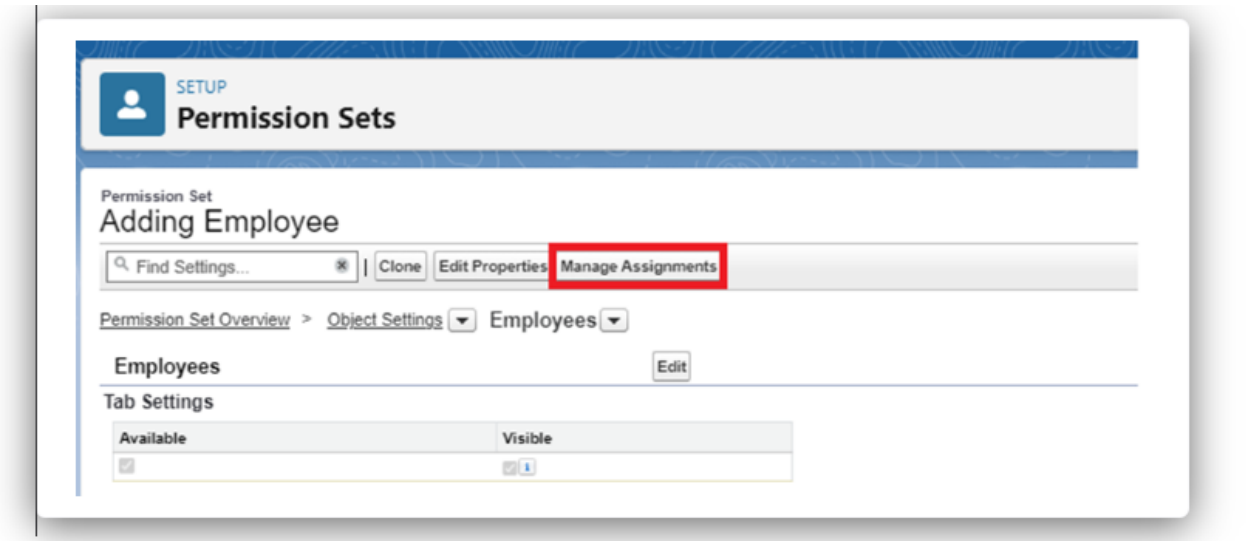
3. Under Apps Select object settings.

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

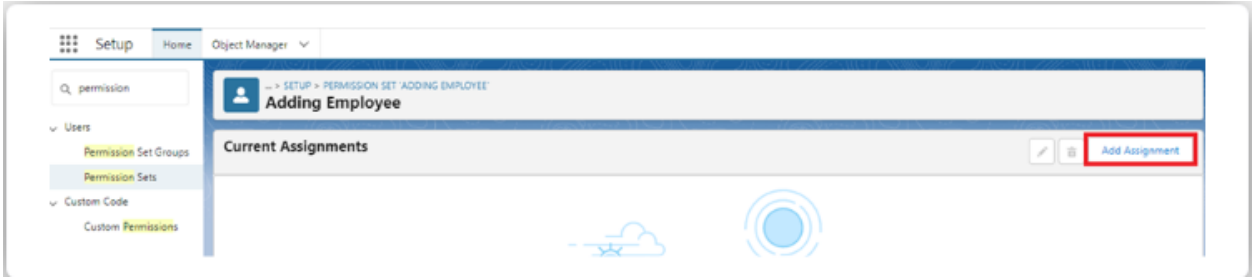
5. Click on Save.

6. After saving the permission click on the Manage assignment

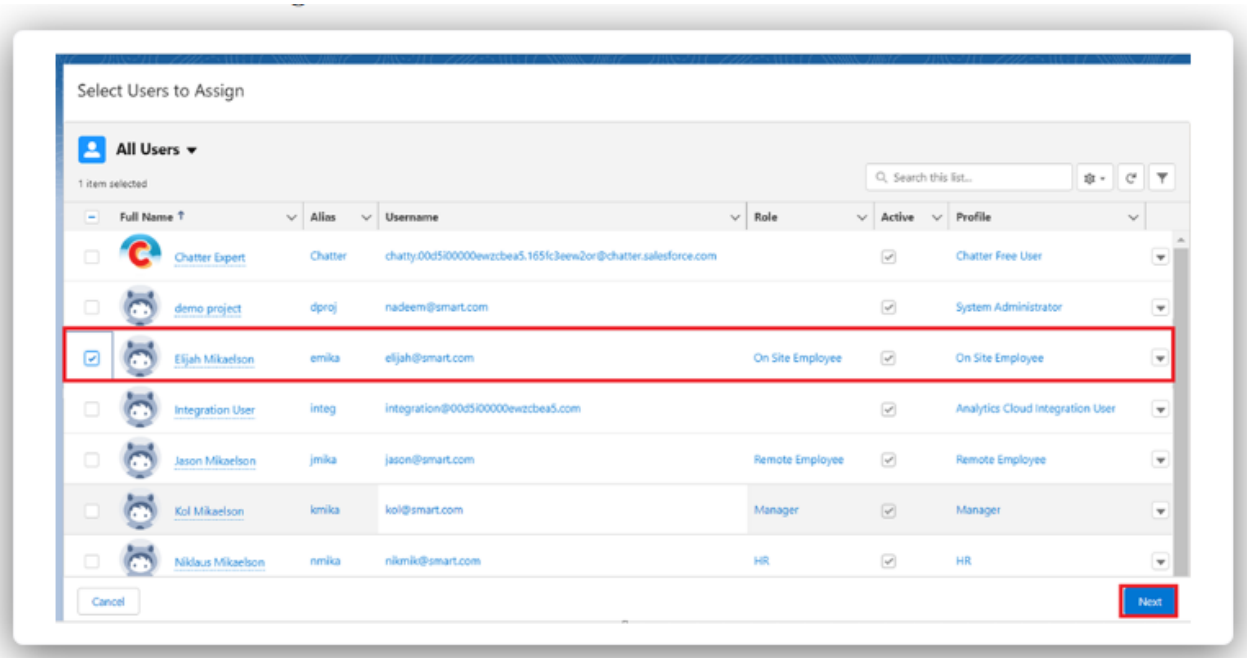




7. Now click on the Manage Assignment.



8. Click on Add Assignment.



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

10. Click on Assign

11. Click on Done.

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.

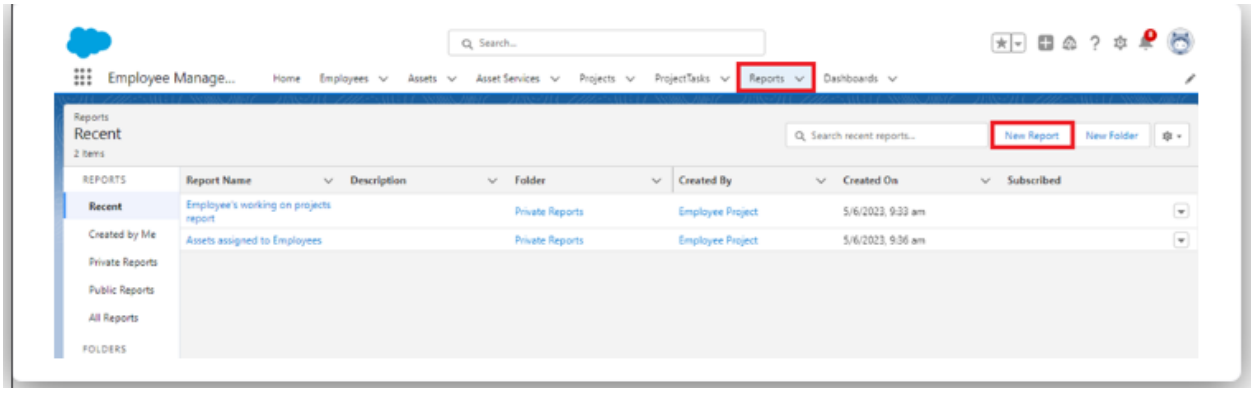
Types of Reports in Salesforce

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

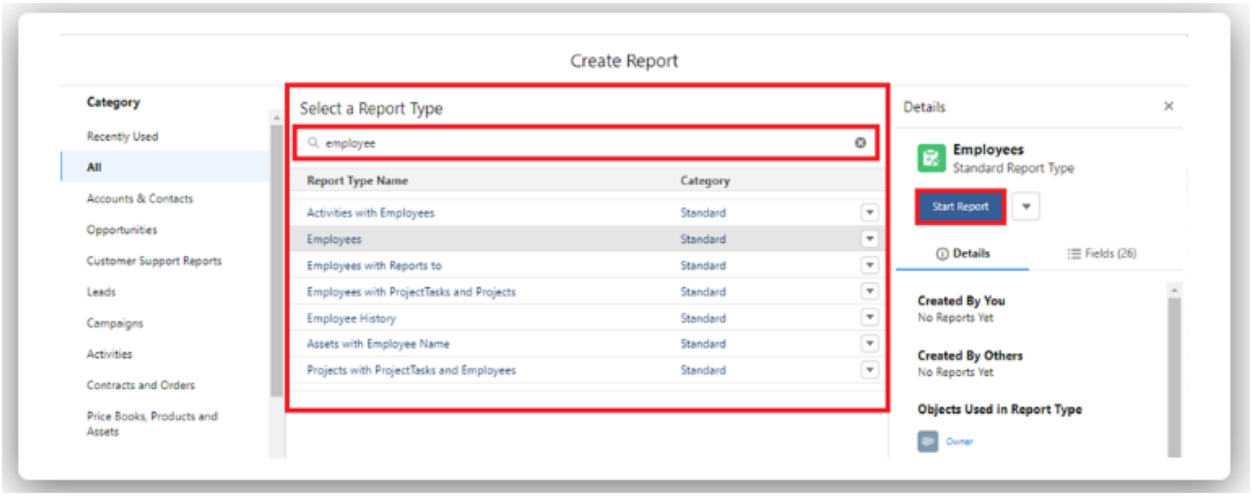
Activity 1: Create Report

To Create a Report:

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

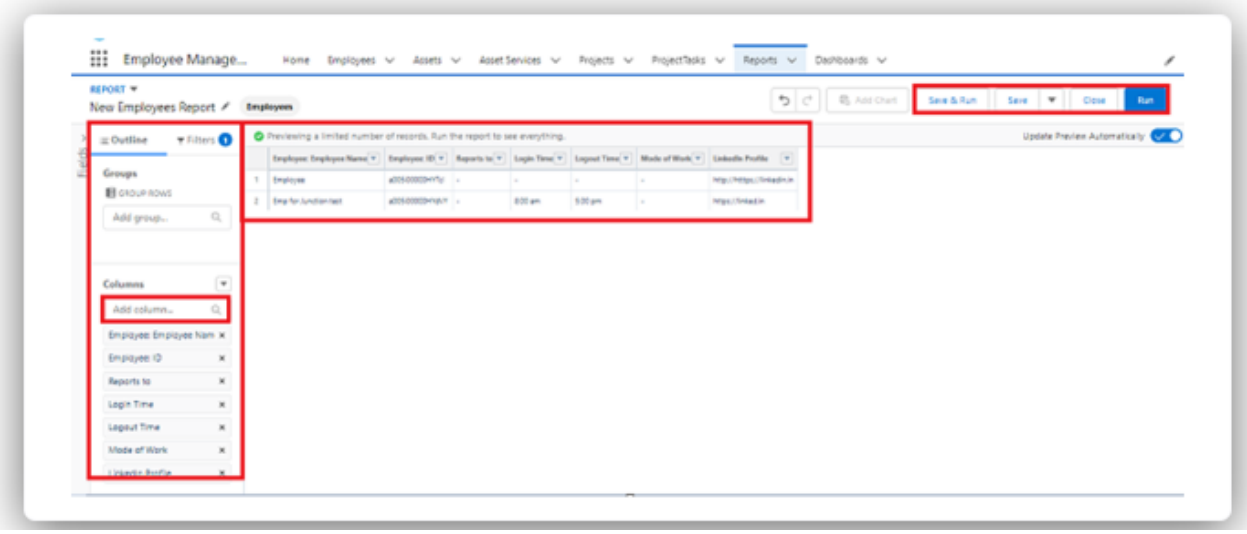


3. Select report type from category or from report type panel or from search panel --> click on start report.



4. Customize your report

--> Add fields from left pane as shown below



5. Save or run it.

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

Activity 2: Create 2 more Report

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

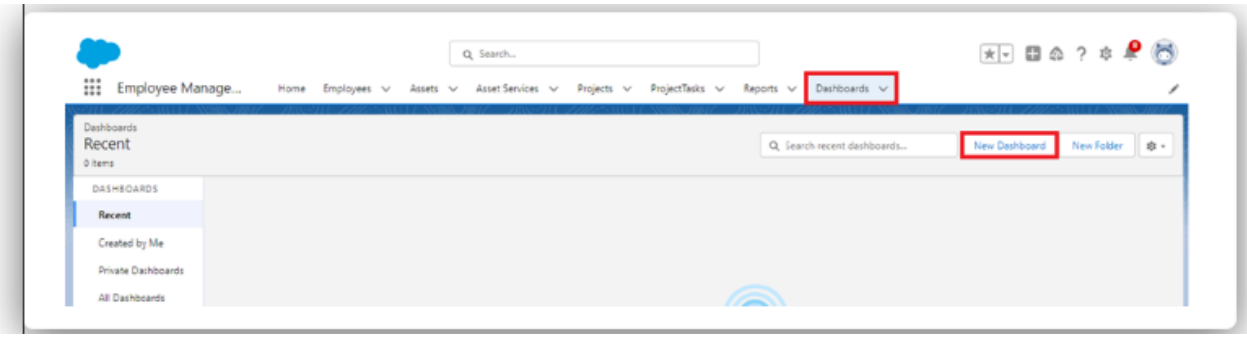
Dashboards

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

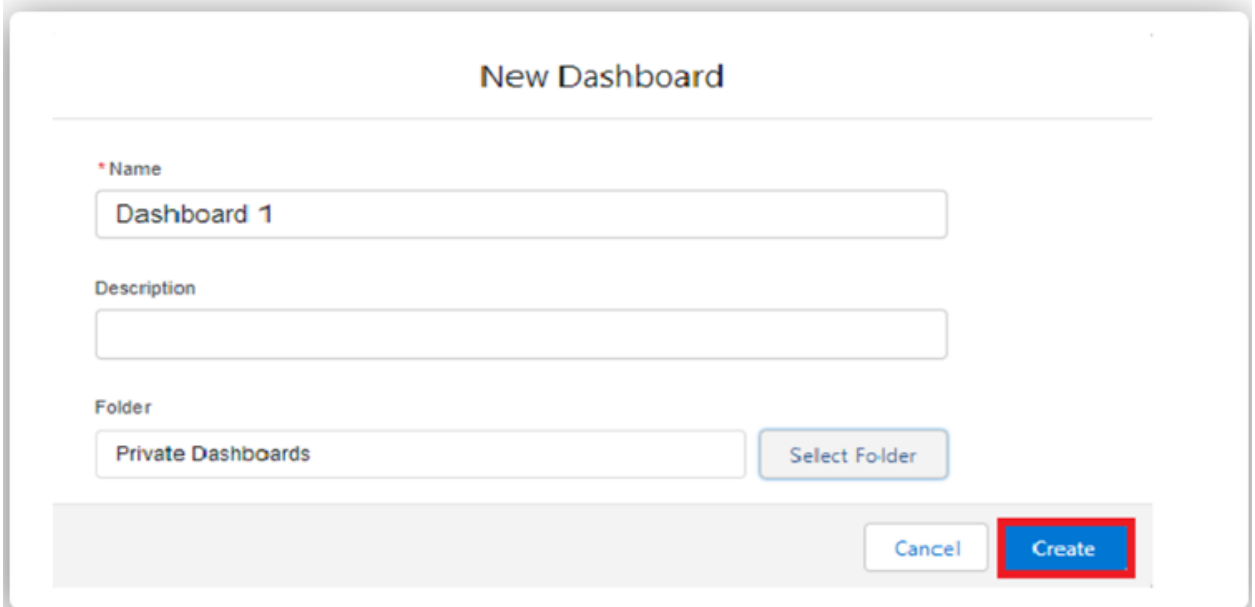
Activity 1: Create Dashboard

To Create a Dashboard

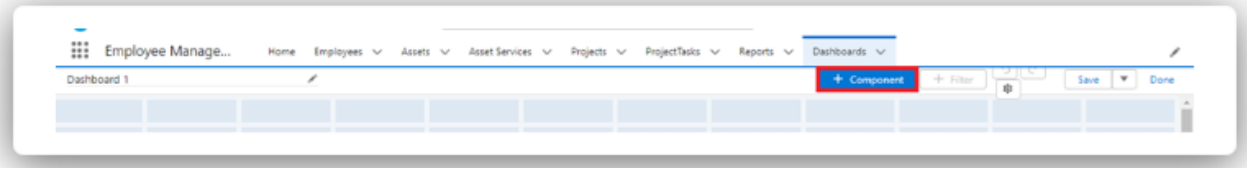
1. Go to the app --> click on the Dashboards tabs.



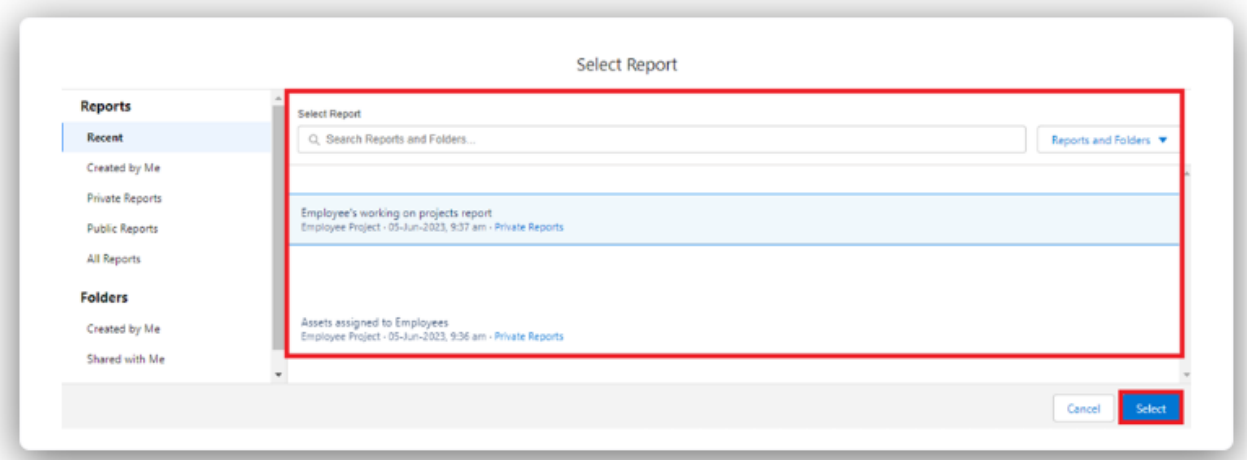
2. Give a Name and click on Create.



3. Select add component



4. Select a Report and click on select.



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

Activity 2:

Create another Dashboard as we discussed in activity 1.