



Manage Threats and Opportunities (FIT4MTO)


Admins and Super User Features

Creating Workstreams

1.0

Workstream Definition for MTO – Use with MTO Work Process

- Fit4 MTO Workstream – this feature will be used to define the default asset hierarchy for each Asset/Site Production Team / Area / Unit (Level 6, 7 & 8 or “Unit” fields). Asset hierarchy is set up as initial site configuration and can be modified by System Administrator (Site will work with IT Support to update). Workstream has the following components.
 - 1 – Details
 - 2 – Hierarchy
 - 3 – Pre-Defined Approvers

 **Asset Hierarchy** Save

Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
DS	Manufacturing	Americas (M)	Deer Park (M)	Site (M)	Distilling	Distilling - AREA
Data filter 1	Data filter 2	Data filter 3				
--Select--	--Select--	--Select--				

Details

Related

Pre-Defined Approvers

Information

Workstream Name
Deer Park Distilling PT

Owner

 [Carl Hollier](#)

Workstream Sponsor
 [Lisa Lee](#)

Workstream Lead
 [Carl Hollier](#)

Finance Sponsor
 [Rene Duinkerken](#)

Workstream Target
USD 75.00

Workstream Ambition
USD 37.00

Delete
☐

Workstream Description
Deer Park Manufacturing Site, Refining Distilling Production Team

Workstream Definition for MTO – Details Field Description

Details

Related

Pre-Defined Approvers

Information

Workstream Name

Deer Park Distilling PT

Owner ⓘ

 [Carl Hollier](#)

Workstream Sponsor ⓘ

 [Lisa Lee](#)

Workstream Lead ⓘ

 [Carl Hollier](#)

Finance Sponsor ⓘ

 [Rene Duinkerken](#)

Workstream Target ⓘ

USD 75.00

Workstream Ambition ⓘ

USD 37.00

Delete

☐

Workstream Description ⓘ

Deer Park Manufacturing Site, Refining Distilling Production Team

• Workstream Details:

- Name:
 - Set to represent the Asset/Site Production Team it represents
- Owner:
 - User who initially created the Workstream
- Sponsor:
 - Production Unit Manager or OIM
- Lead:
 - Reliability Engineer assigned to the Production Team for support
- Finance Sponsor:
 - Used by the WAVE project for final approval. Will not be used in MTO but a name has to be entered when first creating and on the Details page. Name can be removed from the "Pre-Defined Approvers" view (covered later)
- Target:
 - Used to capture Site Production Team annual target for New Entries (KPI1)
- Ambition:
 - Used to capture Site Production Team annual target for Resolved/Realised Entries (KPI3)
- Description:
 - Short text field describing the Workstream

Workstream Definition for MTO – Hierarchy Field Description

The screenshot shows a web interface titled "Asset Hierarchy" with a "Save" button in the top right corner. The interface is organized into two rows of dropdown menus. The first row contains seven dropdowns labeled "Level 1" through "Level 7". The second row contains three dropdowns labeled "Data filter 1", "Data filter 2", and "Data filter 3".

Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
DS	Manufacturing	Americas (M)	Deer Park (M)	Site (M)	Distilling	Distilling - AREA

Data filter 1	Data filter 2	Data filter 3
--Select--	--Select--	--Select--

Workstream Hierarchy: As noted earlier, the initial set up of the Workstreams will be done by the IT team when migrating the L-MTO Site data to the Fit4 Tool. Of note with workstream is the hierarchy is not “required” at this time so in future when sites either request new or update – then they must recall to review the Hierarchy settings.

- The overall asset hierarchy is set up to align with the Business (UP, IG or DS) agreed hierarchy. The following levels are defined within the Fit4 MTO tool. It has been agreed the following “Levels” will represent as noted even though it may not completely align with the business. This is to ensure when extracting data from the Fit4 tool the “location” of key information such as Production Team name will be consistent across the businesses
- Field Names
 - Level 1 – Business (DS, UP, IG) (Not included in L-MTO)
 - Level 2 – Class or Line of Business (DW, Manufacturing, etc) (L-MTO Class of Business)
 - Level 3 – Business Area (UP/IG) or Region (DSM) (L-MTO Region)
 - Level 4 – Asset / Site (L-MTO Site Name)
 - Level 5 – Manufacturing Type (Refining, Chemical, Upgrader); UP/IG – not defined (Not included in L-MTO)
 - Level 6 – L-MTO Defined “Production Team” (does not currently exist in the business hierarchy)
 - Level 7 – L-MTO defined “Area” (does not currently exist in the business hierarchy)
 - Level 8 – L-MTO defined “Unit”
 - note – the L-MTO unit name most likely differs from the business hierarchy unit names but this field will align to the L-MTO unit names

Adding Workstreams in FIT4MTO (Super User/Admin Feature)

Logged in as Carl Hollier (carl.hollier@shell.com.up.uat) | Sandbox UAT | Log out as Carl Hollier

Fit4 Home Initiatives Workstreams Reports Dashboards Cadence Transformation Health

Click on Workstreams "+ New Initiative" on the ribbon on top

Dashboard
Shell Fit4 Dashboard v2
Last refreshed 51 days ago. Refresh this dashboard
As of Apr 15, 2020 12:58 AM Viewing as Bhavesh Par

Phase: All

Funnel size in \$ split by WS

Workstream

- US Mainten...
- UPX test
- Test workstr...
- Test Wells
- Test SMEP
- testing new
- TEST
- TA workstre...
- T&S Workstr...
- T&S Workstr...
- T&S Workstr...

Current Year Value (Planned) (USD)

6.7B

View Report (Funnel size in \$ split by WS)

Recent records

- Maintenance Gelsmer
- Test Incubator Setup
- Moerdijk
- Maintenance Bukom
- GoM Assets - South

Recent lists

- All
- Fit4 - DS - Trading & Supply

Initiatives by Phase \$

Record Count: 5.2k

Phase	Value	Percentage
L0	574	11.1%
L1	858	10.79%
L2	980	18.96%
L3	1.4k	26.17%
L4	1.5k	28.22%
L5		

View Report (Initiatives by Phase)

Initiatives All Time

To view this table, refresh the dashboard.

View Report

Initiatives by Project Status #

Overall status

- New Entry
- On track

Initiatives by Project Status \$

Overall status

- New Entry
- On track

Total 5 Year Value (Planned)

Data Quality for Vps(UP)

To view this table, refresh the dashboard.

FIT4 updates

[Click here for Training guide](#)

[Click here to know more about obsolete fields for reports](#)

[Refresh Week on Week Report](#)

[Refresh Data Quality Report for Vps](#)

Initiative Action

S.No	Initiative Name	Initiative Action	Due Date
1	TEST_Fake Ursa Opportunity	Test	
2	Test Cost for Compressors	test	
3	Test Mukesh	test test	2020-05-29
4	Test Demo	Milestones1	

Items to Approve

test Manufacturing UAT
Initiative - Submitted by Saravanan Paramasivam
ABT-0000628
Allocate Benefit Type - Submitted by Lorena Derington
L1
Initiative - Submitted by FIT4 System Administrator
ABT-0000100

Notes

New Workstream

Select a record type

- ☒ Downstream - Super User
- ☐ Downstream
- ☐ Downstream - Administrator
- ☐ Upstream
- ☐ Upstream - Administrator
- ☐ Upstream - Super User

Cancel

Next

Note: if you belong to DS select "Downstream – Super User" for UP&IG select "Upstream – Super User" and click Next

Information

Workstream Name
Catalyst Bukom

1) Enter Name of Workstream i.e. Focus Area + Production Team

Workstream Sponsor ⓘ

Rashi Bates

2) Enter Name of Sponsor or Production Team Manager

Workstream Lead ⓘ

Carl Hollier

3) Enter Name of Reliability lead for the Workstream

Finance Sponsor ⓘ

Carl Hollier

4) Enter Name of Production Team Manager

Workstream Target ⓘ

Workstream Ambition ⓘ

Delete

Workstream Description

Salesforce Sans

12

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5) Enter the description for the Workstream

Cancel

Save & New

Save

6) Click Save

RESTRICTED

1) Select the respective Dropdown values for different Hierarchy levels

Asset Hierarchy

Level 1

Level 2

Level 3

Level 4

Level 5

Level 6

Level 7

OS

Manufacturing

Americas (M)

Deer Park (M)

Site (M)

HOA

HOA - Area

Data filter 1

Data filter 2

Data filter 3

--Select--

--Select--

--Select--

Save

Details Related Pre-Defined Approvers

Information

Workstream Name

MTO Deer Park HOA PT

Workstream Sponsor

Carl Hollier

Owner

Carl Hollier

Details Related Pre-Defined Approvers

2) Click on the Pre-Defined Approvers Tab to see the Approval matrix

Pre-Defined approvers (6)

Pre-Defined approvers Name	Workstream Lead	Workstream Sponsor	Finance Sponsor
L0	Lisa Lee		
L1	Lisa Lee		
L2	Lisa Lee		Carl Hollier
L3	Lisa Lee	Rashi Bates	Carl Hollier
L4	Lisa Lee	Rashi Bates	Carl Hollier

Note: For this UAT Please select only Deer Park (M) and Shell Operated in Level 4 and Level 3 respectively for DSM and Upstream

View All

Modifying the Approval Matrix

Details Related Pre-Defined Approvers

Pre-Defined approvers (6)

Pre-Defined approvers Name	Workstream Lead	Workstream Sponsor	Finance Sponsor
L0	Lisa Lee		
L1	Lisa Lee		
L2	Lisa Lee		
L3	Lisa Lee		
L4	Lisa Lee		
L5			

1) Click on L0

Pre-Defined approvers L0

Related Details

* Pre-Defined approvers Name

L0

Phase

L0

Workstream Lead

Lisa Lee

Workstream Lead 2

Search People...

Workstream Lead 3

Search People...

Workstream Sponsor

Search People...

Workstream Sponsor 2

Search People...

Workstream Sponsor 3

Search People...

Finance Sponsor

Cancel

Save

Note: below steps will be same if a Site Admin needs to set-up a workstream differently

Asset Hierarchy

Details Related Pre-Defined Approvers

Pre-Defined approvers (6)

New

Pre-Defined approvers Name	Workstream Lead	Workstream Sponsor	Finance Sponsor
L0	Carl Hollier		
L1			
L2			
L3			
L4			
L5		Carl Hollier	
		View All	

Proposed is to only keep Lead at L0 and Sponsor at L5

2) Click on x to delete the user as an Approver for this Stage


3) Click on Save

RESTRICTED

Adding/Modifying Hierarchy & Units in FIT4MTO

2.0

Adding/Modifying Hierarchy & Units in FIT4MTO



All ▾

Search...

★ ▾

+

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⚙️

🔔 1

👤

Fit4

Home

Initiatives ▾

Reports ▾

Workstreams ▾

Dashboards ▾

Cadence Transformation Health

PowerBI Dashboards

Ranking

Asset Hierarchies

Apps

No results

Items

Asset hierarchies

View All

ard

to see the latest data.

Phase

Benefit Type / Opex / Non-Opex

All ▾

All ▾

Open

Refresh

1) Search for Asset Hierarchy

2) Click on Asset hierarchies

Funnel Size by Area - 1st Year

Current Year Value (Planned) (USD)

Class of Business (EVP) ...

Manufacturing ●

Chemicals ●

1.6B

1.6B

View Report (DS - Funnel Size by Area - 1st Year)

Funnel Size by Area - 2nd year

2nd Year Value (Planned) (USD)

Class of Business (EVP) ...

Manufacturing ●

Chemicals ●

1.5B

1.5B

View Report (DS - Funnel Size by Area - 2nd year)

Time in Phase

New since last week, Newsin...

1k

500

0

L0 L1 L2 L3 L4 L5 L5 Com... L5 (Co...

Phase

Measure

New since last week

New since 1 - 3 weeks

New since 3 - 6 weeks

View Report (DS - Time in Phase)

Initiative by Phase #

Record Count: 1.6B

Initiative by Phase \$

Current Year Value (Planned) (USD): 1.5B

994M

(65.43%)

One or more of the fields selected in the component is no longer available in the report. Use the dashboard component editor to select one of the available fields.

FIT4 updates

[Click here for Training guide](#)

[Click here to know more about obsolete fields for reports](#)

Refresh Week on Week Report

Refresh Data Quality Report for Vps

Initiative Action

S.No	Initiative Name	Initiative Action	Due Date
1	CBH Test Threat	Test adding new action	2020-05-31
2	29 April Test Threat Input Form #2 - CBH	I-0079309 Action New to Carl	2020-05-31
3	New scope catalyst change	Catalyst Long Lead Item	2020-06-11

Items to Approve

Schade aan 8.8 stoomleiding agv waterslag door overvullen V106



Initiative • Submitted by Josef Jansen

View All

RESTRICTED

12



 Asset hierarchies
DS ▾ 

50+ iter

LIST VIEWS

1 All

2 CFO

3 ☒ DS

4 IG

5 Recently Viewed (Pinned list)

6 UP

Level ↑

1
1
1
1
2
2
2
2
2
2

1) Click DS for Downstream & UP & IG for Upstream, Integrated Gas

Note: As a part of this testing please select only DS and UP as the two options

For Downstream Manufacturing UAT Users

2.1

Asset hierarchies

DS

NewImportChange OwnerPrintable View

1 item • Sorted by Level • Filtered by all asset hierarchies - Business • Updated a few seconds ago

☐ Asset Name

1 ☐ Deer Park (M)

Level ↑

4

Business

DS

Deer Park (M)

2) Click on Name of the Site

1) Search for the name of your site Example: Deer Park (M). Because we have chemicals and Manufacturing setup in FIT4 hence use (M) as the suffix behind Site Name

Asset hierarchy

Deer Park (M)

Related

Details

Asset Name

Deer Park (M)

Parent asset

[Americas \(M\)](#)

isActive

☒

Data Filter

Created By

[FIT4 System Administrator](#), 5/18/2020 6:12 AM

Business

DS

Level

4

Last Modified By

[FIT4 System Administrator](#), 5/18/2020 6:12 AM

Owner

[FIT4 System Administrator](#)

Assets (1)

New

Name

Site (M)

Business

DS

3) Click on Site (M)

Asset hierarchy
Site (M)

Related

Details

Asset Name

Site (M)

Parent asset

[Deer Park \(M\)](#)

isActive



Data Filter

Created By

[FIT4 System Administrator](#), 5/18/2020 6:32 AM

Business

DS

Level

5

Last Modified By

[FIT4 System Administrator](#), 5/18/2020 6:32 AM

Owner

[FIT4 System Administrator](#)

2) You can use this to add a new Production team in the system

Assets (16)

New

Name	Business
CC&G/AMT	
Coking	DS
Distilling	DS
HQA	DS
Hydro/Sulfur	DS
Laboratory	DS

1) Click on the Production team name

RESTRICTED



Related

Details

1) Click on the Related for accessing Unit Table

Asset Name

Distilling

Parent asset

[Site \(M\)](#)

isActive



Data Filter

Created By



[Carl Hollier](#), 6/12/2020 10:11 AM

Business

DS

Level

6

Last Modified By



[Carl Hollier](#), 6/12/2020 10:11 AM

Owner



[Carl Hollier](#)



Assets (1)

2) You can use this to Add/Modify Area for your Site

New

Name



[Distilling - AREA](#)

Business



DS



Related

Details



Asset hierarchies (1)

New

Asset Name	Level	Business	isActive
Distilling - AREA	7	DS	<input checked="" type="checkbox"/>
View All			

2) Click on New if you want to add New Unit for the Production team



Units (6+)

New

1) Click on the Unit Name if you want to Modify

Unit Name	Margin per Unit of Capacity	Unit Rated Capacity	Unit of Measure
CPU (Compressor Plant Unit)	0.00	8	MMSCFD
DA	0.00	0	0
DU-1	2.00	70,000	BPD
DU-2	7.97	265,000	BPD
HDU-2 (Naph)	19.50	70,000	BPD
HVI	2.00	25,000	BPD

[View All](#)



Unit CPU (Compressor Plant Unit)

Related

Details

* Unit Name

CPU (Compressor Plant Unit)

isActive



Asset hierarchy

Distilling

Unit Designation

Flare Gas Recovery

* Margin per Unit of Capacity

0.00


* Unit Rated Capacity

8


* Unit of Measure

MMSCFD

Created By

 Bhavesh Pandey, 6/22/2020 5:06 AM

Last Modified By

 Bhavesh Pandey, 6/22/2020 5:06 AM

Cancel

Save

1) Add/ Modify the details and click Save

RESTRICTED

For Upstream & IG UAT users

2.2

Asset hierarchies

UP

NewImport

1 item • Sorted by Level • Filtered by all asset hierarchies - Business • Updated 4 minutes ago

Asset Name

Level ↑

Business

1

UK and Ireland

3

UP

1) Search for the name of your Business
Example: UK and Ireland

2) Click on Name of the Business

Assets (5)

New

Name	Business
Brent & Penguins	UP
Corporate	UP
Decommissioning	UP
NOV	UP
Shell Operated	UP

3) On the Next Screen Scroll down and select "Shell Operated"



Asset hierarchy
Shell Operated

Related

Details

Asset Name

Shell Operated

Parent asset

[UK and Ireland](#)

isActive



Data Filter

Created By



[Salesforce System Administrator](#), 6/22/2020 9:28 AM

Business

UP

Level

4

Last Modified By



[Salesforce System Administrator](#), 6/22/2020 9:32 AM

Owner



[Salesforce System Administrator](#)



Assets (10)

1) Click on "Gannet"

New

Name	Business
FNGL	UP
Fram	UP
Gannet	UP
Jackdaw	UP
Nelson	UP
NSP	UP



Related

Details

Asset Name

Gannet

Parent asset

[Shell Operated](#)

isActive



Data Filter

Created By



[Salesforce System Administrator](#), 6/22/2020 9:28 AM

Business

UP

Level

5

Last Modified By



[Salesforce System Administrator](#), 6/22/2020 9:32 AM

Owner



[Salesforce System Administrator](#)

1) Click on "MTO Gannet" as the Production Team



Assets (1)

New

2) Click on "New" to create additional teams under Gannet

Name

[MTO Gannet](#)

Business

UP

Related

Details

1) Click on Related

Asset Name

MTO Gannet

Parent asset

[Gannet](#)

isActive



Data Filter

Created By

[Salesforce System Administrator](#), 6/22/2020 9:28 AM

Business

UP

Level


6

Last Modified By

[Salesforce System Administrator](#), 6/22/2020 9:32 AM

Owner

[Salesforce System Administrator](#)

 Assets (6)

New

Name



Business



[Gannet Gas system](#)

UP

[Gannet Oil system](#)

UP

[Gannet Subsea system](#)

UP

[Gannet Utilities](#)

UP

[Gannet Water processing](#)

UP

[Gannet Wells](#)

UP



Asset hierarchy MTO Gannet

[Gannet Water processing](#)

7

UP



[Gannet Wells](#)

7

UP



[View All](#)

2) Click on New if you want to add New Unit for the Production team



Units (6)

New

Unit Name

Margin per Unit of Capacity

Unit Rated Capacity

Unit of Measure

[Gannet Gas system](#)

1) Click on the Unit Name if you want to Modify

00

BOE



[Gannet Oil system](#)

50.00

50,000

BOE



[Gannet Subsea system](#)

50.00

50,000

BOE



[Gannet Utilities](#)

50.00

50,000

BOE



[Gannet Water processing](#)

50.00

50,000

BOE



[Gannet Wells](#)

50.00

50,000

BOE



[View All](#)

Adding Users

3.0

Note: The Support Team will address the Normal User Creation Requests however we do have a functionality where Site Admins can do that on their end aswell

Logged in as Carl Hollier (carl.hollier@shell.com.up.ust) | Sandbox: UAT | [Log out as Carl Hollier](#)

Search...

1) Click on Setup

Setup for current app

Service Setup

Shell Fit4 Downstream Dashboard

Last refreshed 28 days ago. Refresh this dashboard to see the latest data.
As of Jun 8, 2020 5:53 AM Viewing as Carl Hollier

Class of Business (EVP) Phase Benefit Type / Opex / Non-Opex

All All All

Funnel Size by Area - 1st Year

Current Year Value (Planned) (USD)

Class of Business (EVP) ...

- Manufacturing
- Chemicals

1.6B

1.6e

[View Report \(DS - Funnel Size by Area - 1st Year\)](#)

Funnel Size by Area - 2nd year

2nd Year Value (Planned) (USD)

Class of Business (EVP) ...

- Manufacturing
- Chemicals

1.5B

1.5e

[View Report \(DS - Funnel Size by Area - 2nd year\)](#)

Time in Phase

New since last week, New since 1 - 3 weeks

Phase

Measure

- New since last week
- New since 1 - 3 weeks
- New since 1 - 3 weeks

[View Report \(DS - Time in Phase\)](#)

Initiative by Phase

Record Count: 1.6e

Initiative by Phase \$

Current Year Value (Planned) (USD): 1.5e

994M

One or more of the fields selected in the component is no longer available in the report. Use the dashboard component editor to select one of the available fields.

FIT4 updates

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[Click here to know more about obsolete fields for reports](#)

[Refresh Week on Week Report](#)

[Refresh Data Quality Report for Vps](#)

Initiative Action

S.No	Initiative Name	Initiative Action	Due Date
1	CBH Test Threat	Test adding new action	2020-05-31
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3	New scope catalyst change	Catalyst Long Lead Item	2020-06-11

Items to Approve

Falen van een bellows type 1/3/5 in de HKW Idg bij pomphuis en valve pit

Initiative - Submitted by Josef Jansen

Test 1

Initiative - Submitted by Kock Ng

Schade aan 8.8 stoomleiding agv waterslag door overvullen V106

Initiative - Submitted by Josef Jansen



Search Setup



Setup

Home

Object Manager ▼

Quick Find

Setup Home

Release Updates (Beta)

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

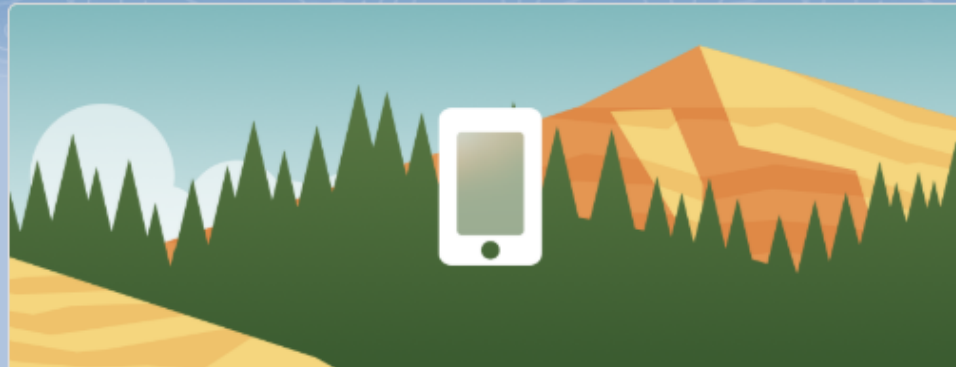
Roles

Users



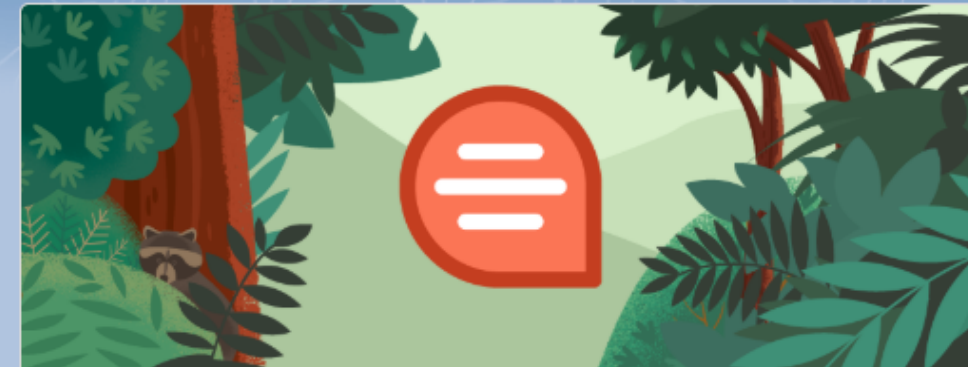
SETUP

Home



Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.



Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

1) Click on Users



SETUP

Users

All Users

[Help for this Page](#) ?

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#) /n/nYour access to modify the users on this page may be limited because you are a delegated administrator. You can edit the users for whom the Action column is not blank.

View: All Users Clone Create New View

<Previous Page | Next Page>

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

[New User](#)[Reset Password\(s\)](#)[Add Multiple Users](#)

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager	Nickname	Email	Phone	Extension	Federation Id	Is Frozen	Created By
Edit	a/p Manogaran, Aishwinee	MYAAQR	a_apmanogaran@shell.com.up.uat		Fit4 - DS - Retail - East	<input checked="" type="checkbox"/>	Fit4 - Downstream		User15840946901794699723	a_apmanogaran@shell.com.invalid			MYAAQR	<input type="checkbox"/>	Kopal Goswami
Edit	Abadie, Randall	USRAB1	randall.abadie@shell.com.up.uat		Fit4 - UP Deepwater (UPD) - DW Gulf of Mexico	<input type="checkbox"/>	Fit4 - Upstream		Randall Abadie	randall.abadie@shell.com.invalid			USRAB1	<input type="checkbox"/>	Prasanna Vainatheya
Edit	Abatan, Adetola	aabat	adetola.abatan@shell.com.uat	2/18/2020 1:57 PM		<input checked="" type="checkbox"/>	iShale Admin		User15814855983386448595	adetola.abatan@shell.com			USAAB3	<input type="checkbox"/>	Vijayalakshmi Kattamuri
Edit	Abbas Abdi, Syed Zeerak	USZAB2	zeerak.abbas@shell.com.up.uat	2/19/2020 4:39 PM	Fit4 - UP Deepwater (UPD) - DW Gulf of Mexico	<input checked="" type="checkbox"/>	Fit4 - Upstream		Zeerak Abbas	zeerak.abbas@shell.com			USZAB2	<input type="checkbox"/>	Harsha Rastogi

RESTRICTED

29

Setup

Home

Object Manager

Quick Find

Setup Home

Release Updates (Beta)

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

Users

> Data

> Email

PLATFORM TOOLS

> Apps

> Feature Settings

> Objects and Fields

> Process Automation

> User Interface

> Custom Code

SETUP

Users

New User

Help for this Page

Use the form below to create or modify the user information. Your selection of roles and profiles may be limited because you are a delegated administrator.

User Edit

Save

Cancel

General Information

First Name

Bhaves

Last Name

Pandey

Alias

INBPBG

Email

bhaves.pandey@shell.com

Username

bhaves.pandey@shell.com.up

Nickname

User1594116342035453122

Title

Company

Department

Division

Role

Fit4 - DS - Manufacturing

User License

Salesforce Platform

Profile

Fit4 - Downstream

Active

☒

Marketing User

☐

Offline User

☐

Sales Anywhere User

☐

Knowledge User

☐

Flow User

☐

Service Cloud User

☐

Accessibility Mode (Classic Only)

☐

High-Contrast Palette on Charts

☐

Debug Mode

☐

Quick Access Menu

☒

Allow Forecasting

☐

Phone

Extension

Required Information

1) Fill in the attached User Information



Single Sign On Information

Federation ID

1) Add Alias ID for Single Sign-On

Additional Information

Generic Role Level 2

License Cost Center

Sales Manager

Locale Settings

Time Zone

Locale

Language

Currency

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails

☐ Generate new password and notify user immediately

2) Uncheck the box

3) Click Save

Setup

Home

Object Manager

Quick Find

Setup Home

Release Updates (Beta)

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

Users

Data

Email

PLATFORM TOOLS

Apps

Feature Settings

Objects and Fields

Process Automation

User Interface

Custom Code

SETUP

Users

Madhu Kutagulla

Permission Set Assignments

Permission Set Assignments: Activation Required

Permission Set Group Assignments

Permission Set License Assignments

License Data Purchase Assignments

Personal Groups

Public Group Memberships

Queue Memberships

Teams

Permission Set Assignments

Edit Assignments

Permission Set Assignments Help

Action	Permission Set Label	Date Assigned
Def	Fit4 - Downstream Super User	7/3/2020
Def	Fit4-AssetHierarchy-Edit Access	7/3/2020
Def	MTO Access	7/3/2020

Nickname

User1593755612840634913

Title

Company

Department

Division

Address

Time Zone

(GMT-05:00) Central Daylight Time (America/Mexico_City)

Locale

English (United States)

Language

English

Currency

USD - U.S. Dollar

Delegated Approver

Manager

Receive Approval Request Emails

Only if I am an approver

Federation ID

USMKUE

App Registration: One-Time Password Generator

App Registration: Salesforce Authenticator

Lightning Login

Marketing User

Offline User

Sales Anywhere User

Knowledge User

Flow User

Service Cloud User

Mobile Push Registrations

View

Accessibility Mode (Classic Only)

Debug Mode

High-Contrast Palette on Charts

Make Setup My Default Landing Page

Allow Forecasting

Call Center

Phone

Extension

Fax

Mobile

Hover the Mouse on Permission Set Assignment & Then on Edit Assignments

Madhu Kutagulla

Permission Set Assignments

Edit Assignments

Action	Permission Set Label	Date Assigned
Def	Fit4 - Downstream Super User	7/3/2020
Def	Fit4-AssetHierarchy-Edit Access	7/3/2020
Def	MTO Access	7/3/2020

Nickname	User1593755612840634913	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Sales Anywhere User	<input type="checkbox"/>
Department		Knowledge User	<input type="checkbox"/>
Division		Flow User	<input type="checkbox"/>
Address		Service Cloud User	<input type="checkbox"/>
Time Zone	(GMT-05:00) Central Daylight Time (America/Mexico_City)	Mobile Push Registrations	View
Locale	English (United States)	Accessibility Mode (Classic Only)	<input type="checkbox"/>
Language	English	Debug Mode	<input type="checkbox"/>
Currency	USD - U.S. Dollar	High-Contrast Palette on Charts	<input type="checkbox"/>
Delegated Approver		Make Setup My Default Landing Page	<input type="checkbox"/>
Manager		Allow Forecasting	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Call Center	
Federation ID	USMKUE	Phone	
App Registration: One-Time Password Generator		Extension	
App Registration: Salesforce Authenticator		Fax	
Lightning Login		Mobile	

RESTRICTED

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Select the permission set and click save

Permission Set Assignments
Madhu Kutagulla

The screenshot shows a web interface for managing permission sets. At the top right, there are 'Save' and 'Cancel' buttons. The main area is divided into two columns: 'Available Permission Sets' on the left and 'Enabled Permission Sets' on the right. Between these columns are 'Add' and 'Remove' buttons. The 'Available' list contains: FIT4-AssetHierarchy-Read_Access, Fit4 - Downstream - Administrator, Fit4 - Downstream - Generic user - Administrat, and Fit4 - Downstream - Generic user - Super User. The 'Enabled' list contains: FIT4-AssetHierarchy-Edit_Access, Fit4 - Downstream Super User, and MTO_Access. Both lists have vertical scroll bars.

Available Permission Sets	Enabled Permission Sets
FIT4-AssetHierarchy-Read_Access	FIT4-AssetHierarchy-Edit_Access
Fit4 - Downstream - Administrator	Fit4 - Downstream Super User
Fit4 - Downstream - Generic user - Administrat	MTO_Access
Fit4 - Downstream - Generic user - Super User	

- Downstream Super User is Super User in Fit4 who would have Read/Edit access to all Manufacturing sites. This is the elevated level of permission to create Workstreams.
- Downstream Administrator will have access to their own site and region
- Generic User Super User is used where you want to give access to user to create T/O only across Class of Business
- Generic User Administrator is used where you want to give access to only to a region or site

