WORKFORCE ADMINISTRATION SOLUTION

(ADMIN)

By

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PROJECT ABSTRACT

WORKFORCE ADMINISTRATION SOLUTION (ADMIN)

The 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.

The Workforce Administration Solution is a comprehensive software platform designed to automate and manage the processes related to employee project assignments and asset management within an organization. By centralizing employee data, this solution enhances efficiency in tracking employee performance, the number of projects an employee is involved in, and the assets assigned to them. It streamlines administrative tasks, enabling better decision-making through real-time insights and collaboration. The integration of bulk data import capabilities simplifies onboarding and data management processes, while advanced security features in Salesforce ensure the protection of sensitive information. Group collaboration tools foster teamwork, and the use of reports and dashboards provides actionable insights into project performance and resource allocation.

With an intuitive user interface and scalable architecture, this solution aims to enhance operational efficiency, reduce manual effort, and improve the overall employee experience within the organization.

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Topics

1. Salesforce

INTRODUCTION :-

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.Salesforce is a cloud-based customer relationship management (CRM) platform that helps businesses manage sales, customer service, marketing, and analytics. It streamlines processes like sales tracking, customer support, and marketing automation.

Creating a Salesforce Developer Edition Org

Creating a Salesforce Developer Edition org allows developers to experiment, innovate, and build customized solutions within a controlled environment. With access to Salesforce's powerful development tools and features, developers can prototype, test, and refine their applications, empowering them to deliver robust and tailored solutions to meet unique business requirements. As a Salesforce Administrator for TheSmartBridge you must have a Salesforce developer edition org in order to do all the required works which the CEO desires for TheSmartBridge.
Before creating our developer account, we must know what are the types of Editions Salesforce offers.

Types of Salesforce Editions:

There are mainly five types od Salesforce Editions.They are:

1. Essentials
2.Professional
3. Enterprise
4. Unlimited
5. Developer

1	Essentials	Designed for small businesses getting started with CRM to boost sales or service productivity. It includes a setup assistant and administration tools to customize your deployment as you grow.
2	Professional	Designed for businesses requiring full-featured CRM functionality. It includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small to midsize deployment.
3	Enterprise	Meets the needs of large and complex businesses. It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition, that can support large-scale deployments. Enterprise Edition also includes access to Salesforce APIs, so you can easily integrate with back-office systems.
4	Unlimited	Maximizes your success and extends it across the entire enterprise through the Lightning Platform. It gives you new levels of platform flexibility for managing and sharing all your information on demand. Includes all Enterprise Edition functionality, Premier Support, full mobile access, unlimited custom apps, increased storage limits, and other features.
5	Developer	Provides access to the Lightning Platform and APIs. It lets developers extend Salesforce, integrate with other applications, and develop new tools and applications. Developer Edition also provides access to many of the features available in Enterprise Edition

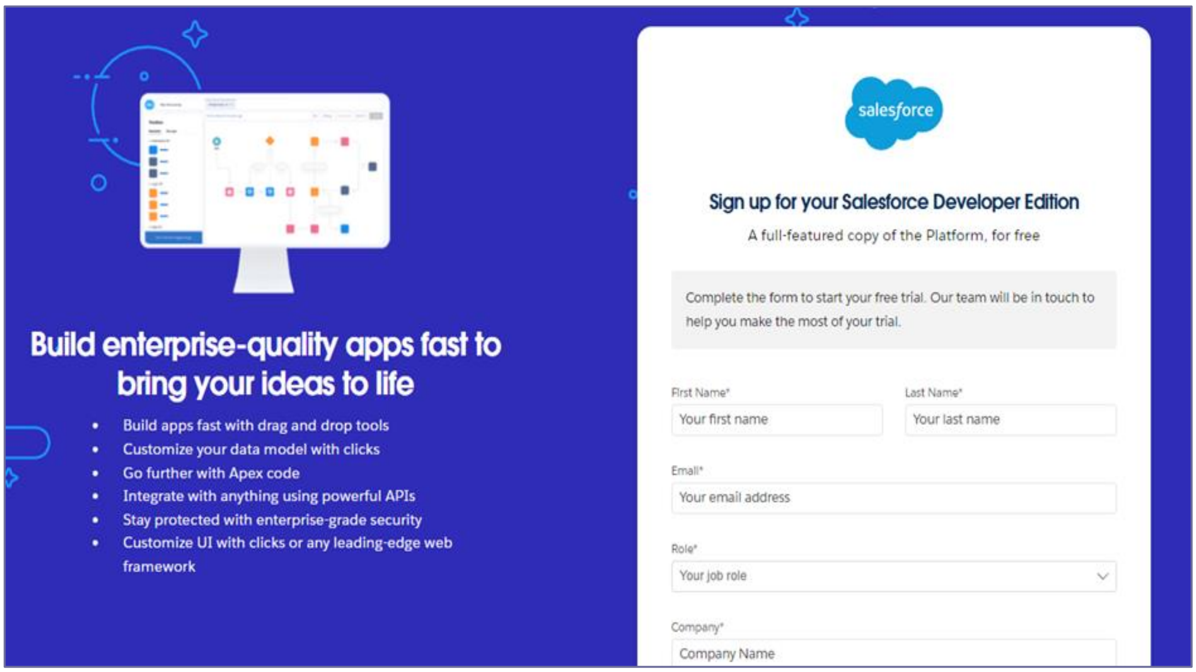
Activity 1: Creating Developer Account

Let's begin with creating our Salesforce Developer Account.

Creating a developer org in salesforce.

1. Go to https://developer.salesforce.com/signup

2. On the sign up form, enter the following details :



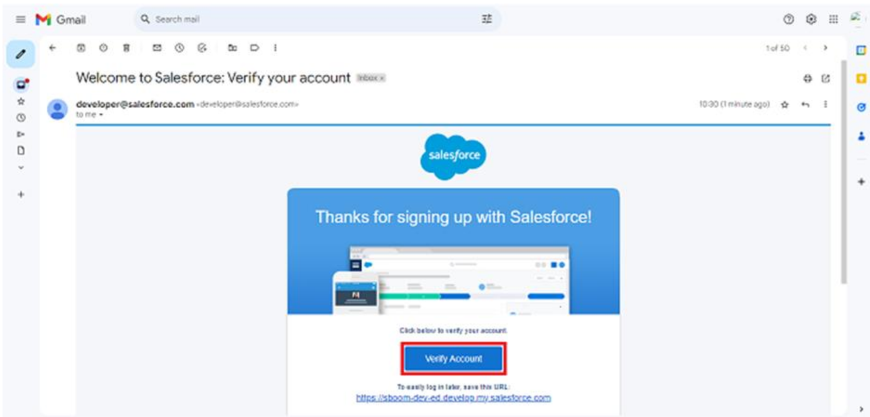
1) First name & Last name
2) Email
3) Role : Developer
4) Company : College Name
5) County : India
6) Postal Code : pin code
7) Username : should be a combination of your name and company
8) Click on Sign me up.

This need not be an actual email id, you can give anything in the format : username@organization.com

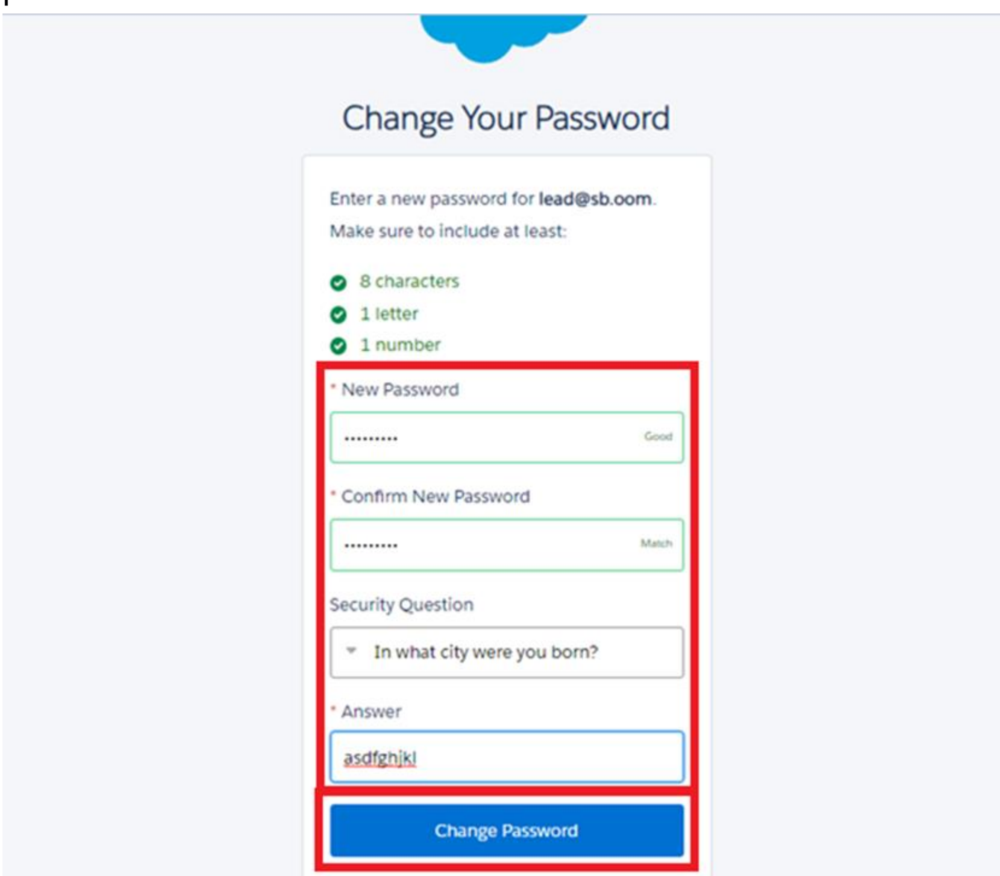
Click on sign me up after filling these.

Activity 2: Account Activation

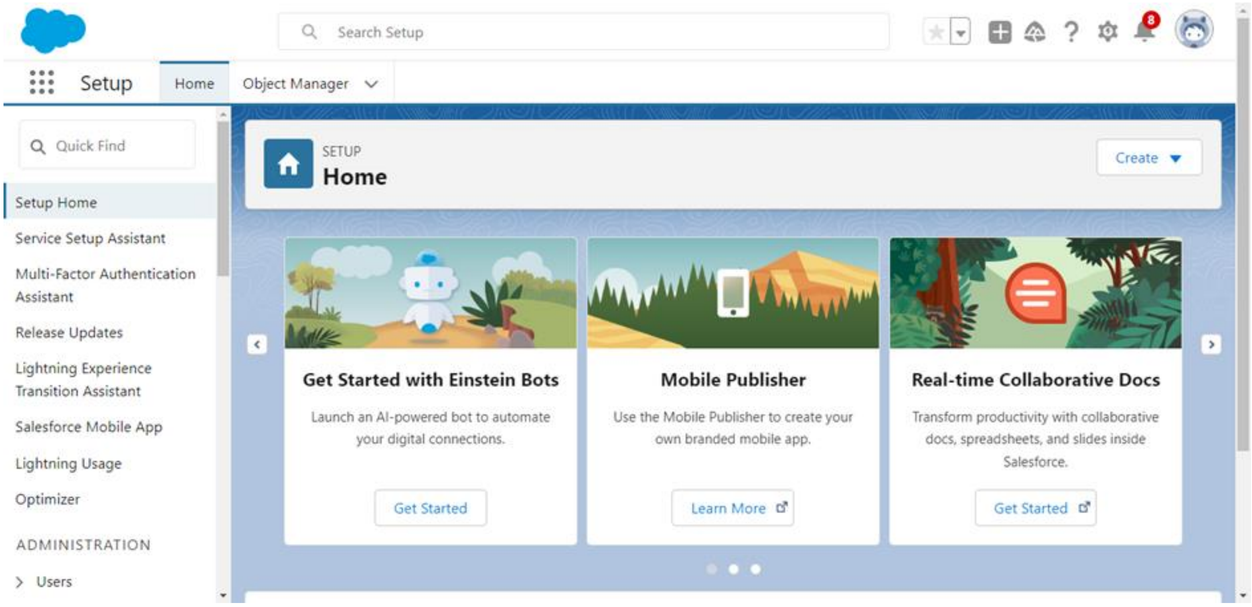
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



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.


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

2. Object

What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects.

Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Activity 1: Create Employee Object

The purpose of creating an Employee custom object is to keep track the employee's activities and their individual and as well as team progress.

To create an object:

1. From the setup page --> Click on Object Manager --> Click on Create --> Click on Custom Object.

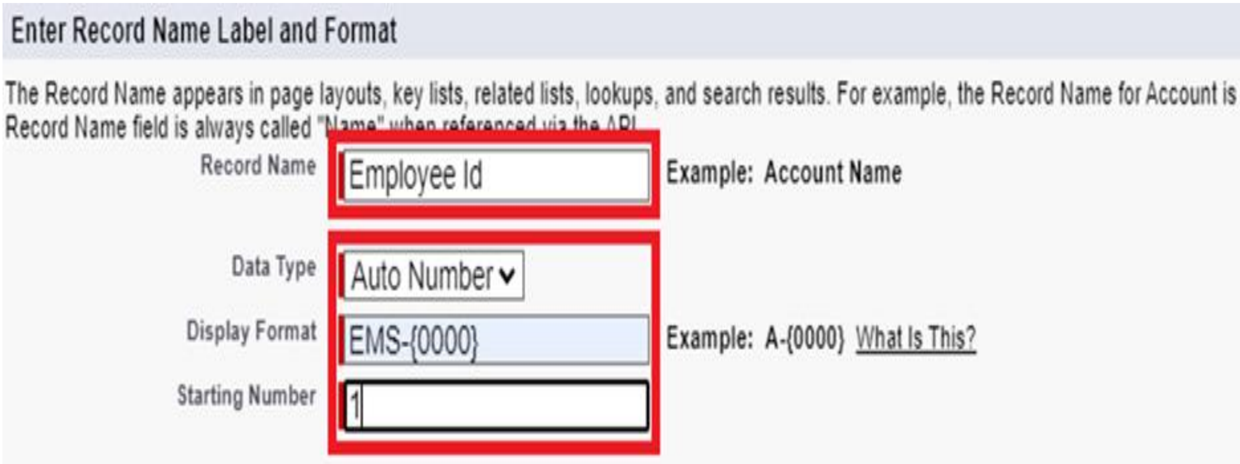
1) Enter the label name: Employee
2) Plural label name: Employees
3) Enter Record Name Label and Format

   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.

Activity 2: Create Project Object

The purpose of creating a project object is to have detailed information about the on-going and completed projects in the organization.

To create an object:

1. From the setup page --> Click on Object Manager --> Click on Create --> Click on

   Custom Object.

   1) Enter the label name--> Project

   2) Plural label name--> Projects

   3) Enter Record Name Label and Format

      1 Record Name : Project ID

      2 Data Type : Auto Number

      3 Display Format : Proj-{0000}

      4 Starting Number : 1

2. Click on Allow reports,

3. Allow search --> Sav

3. Tabs

What is Tab:

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Types of Tabs:

1. Custom Tabs

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2. Web Tabs

Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

3. Visualforce Tabs

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

4. Lightning Component Tabs

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

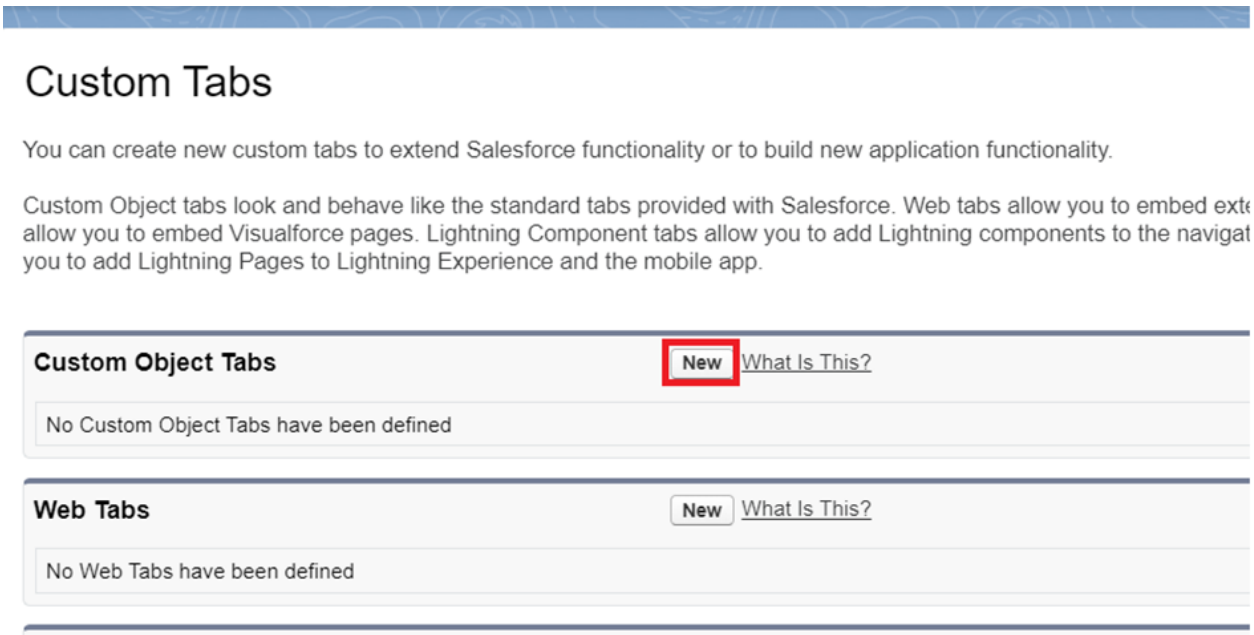
5. Lightning Page Tabs

Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

Activity 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.

4. The Lightning App

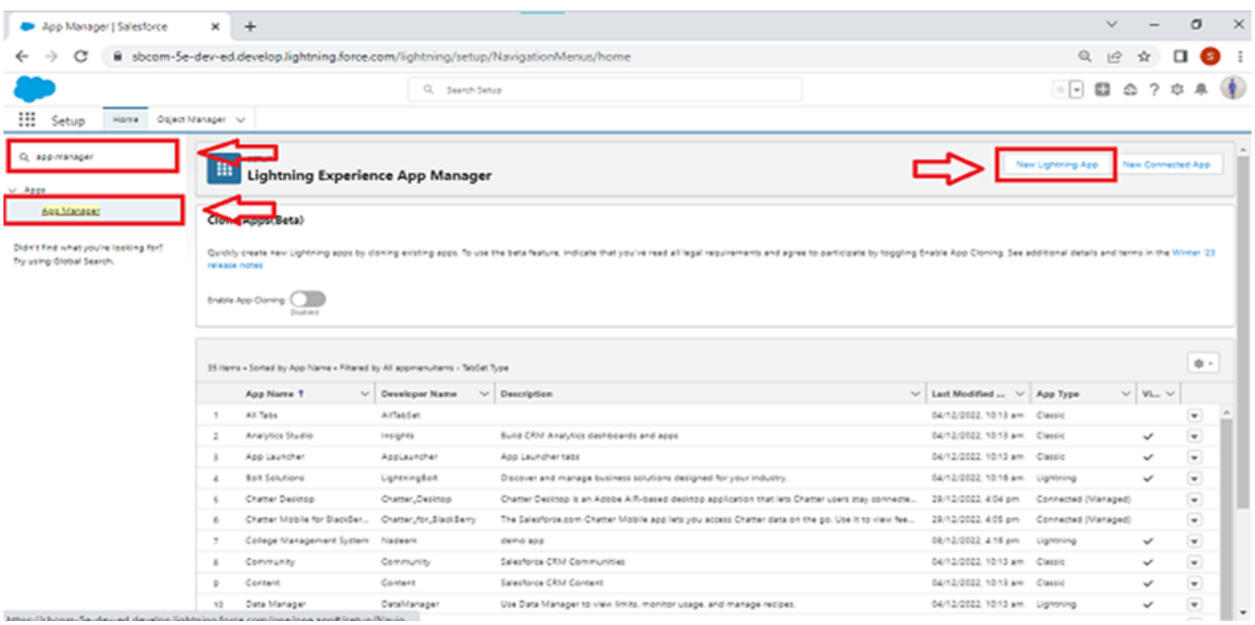
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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

Activity 1: Create a Lightning App

To create a lightning app page:

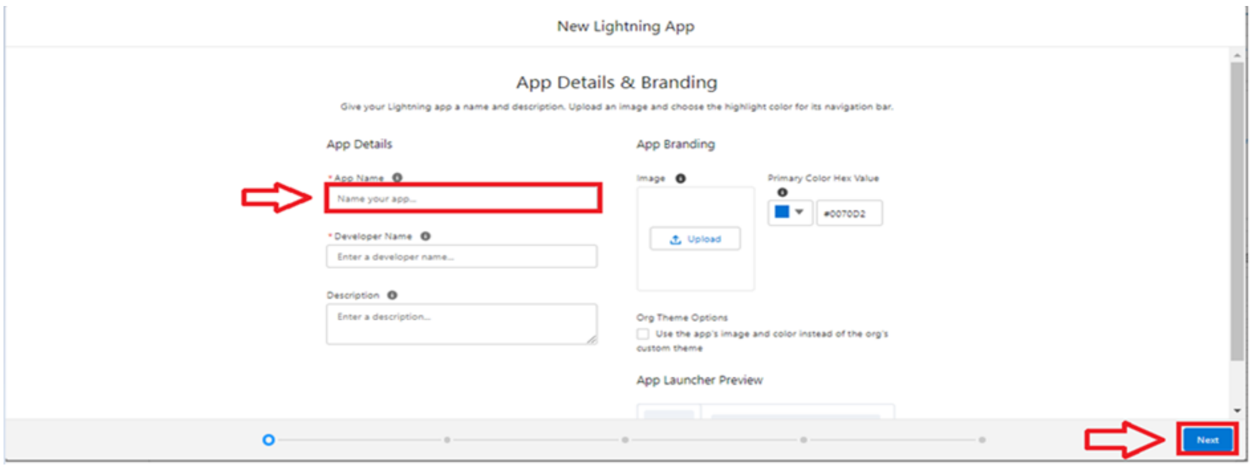
1. Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.



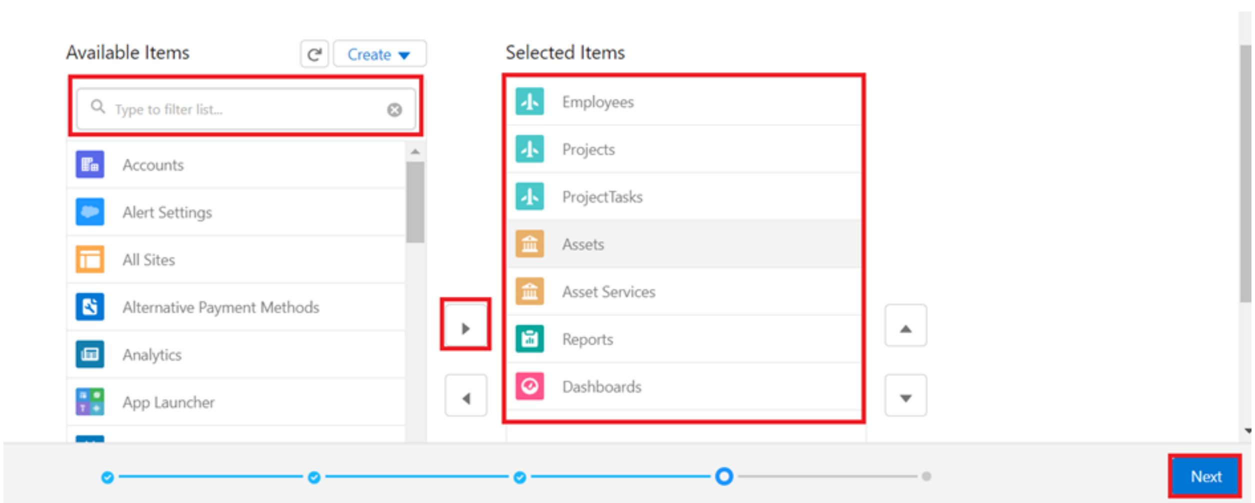
2. Fill the app name in app details and branding as follow
App Name : Workforce Administrator Solution
Developer Name : this will auto populated
Description : Give a meaningful description

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.



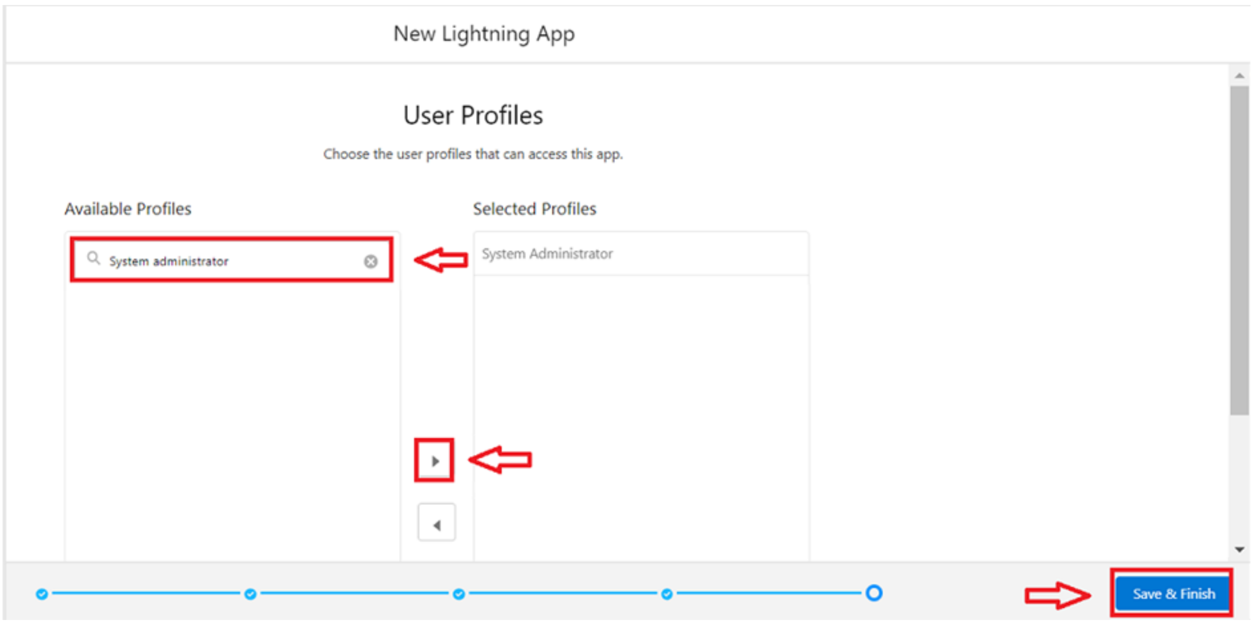
4. To Add Navigation Items:



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

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

5. To Add User Profiles:



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

5. 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

Standard Fields:

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

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

Custom Fields:

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

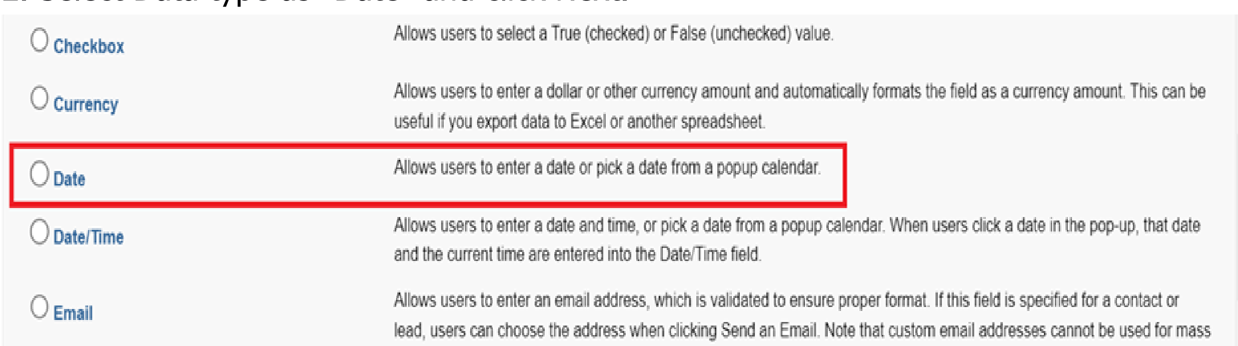
Activity 1 : Creating Text Field in Employee Object

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

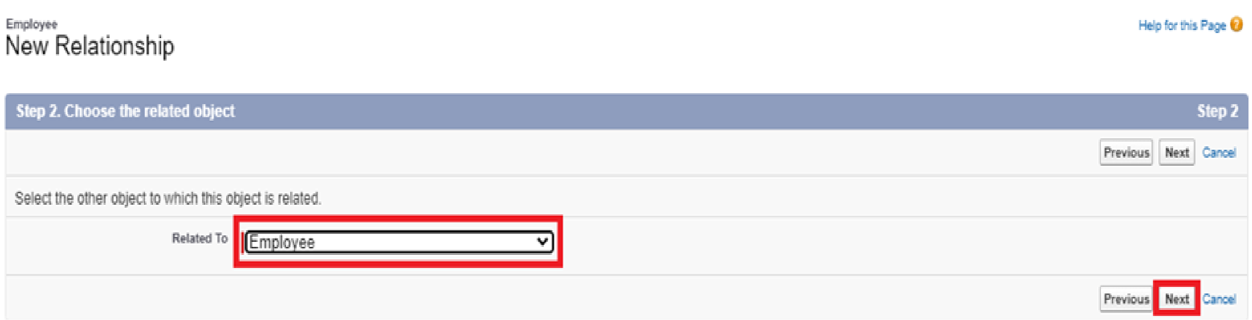
1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as "Formula" and click Next.
3. Give Field Label and Field Name as "Age" and select formula return type as "Number" and click next.
4. Under Advanced Formula write down the formula and click "Check Syntax" and Next --> Next --> Save & 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>Field Name</th><th>Data type</th></tr>
<tr><td>1 Qualification</td><td>Text</td></tr>
<tr><td>2 Address</td><td>Text Area</td></tr>
<tr><td>3 Experience</td><td>Text Area</td></tr>
<tr><td>4 Phone no</td><td>Phone</td></tr>
<tr><td>5 Email</td><td>Email</td></tr>
<tr><td>6 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</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></td>
<td></td>
<td>
<table>
<tr><td>Field Name</td><td>Data type</td></tr>
</table>
</td>
</tr>
</table>

<table>
<tr>
<td>2</td>
<td>Project</td>
<td>
<table>
<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
Completed
On Going
Not Yet Started</td></tr>
</table>
</td>
</tr>
</table>

6. Setting OWD

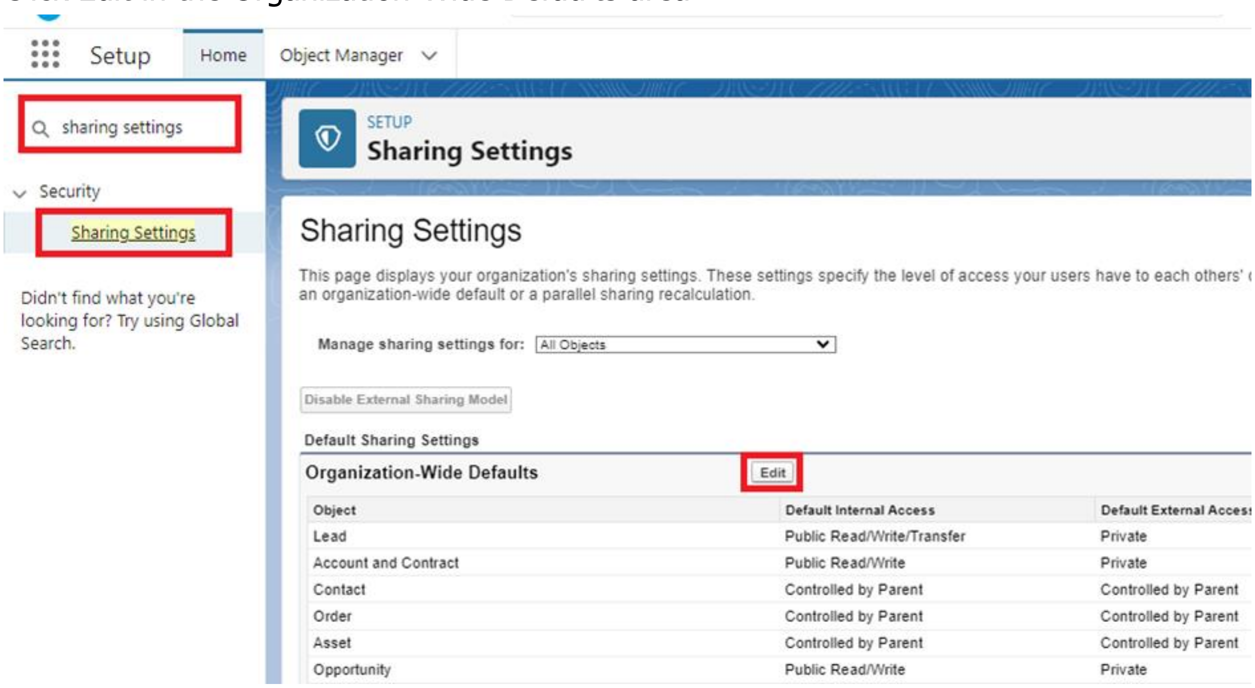
Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles,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

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

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

Activity 1: Create OWD Setting

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



4. Search for the Employee object.

5. Under default internal access and default external access change the options to "Private" and under grant access using hierarchies select the check box.
6. Click on save.

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

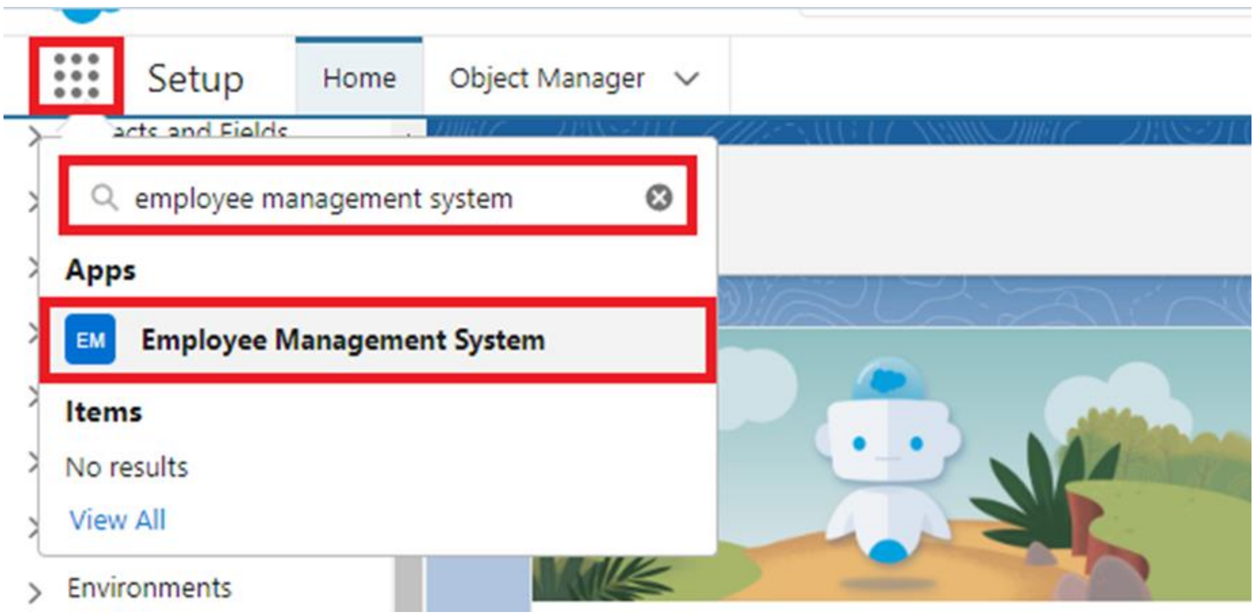
Activity 2:

Set OWD as Private for Project and Asset Service objects.

7. 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.

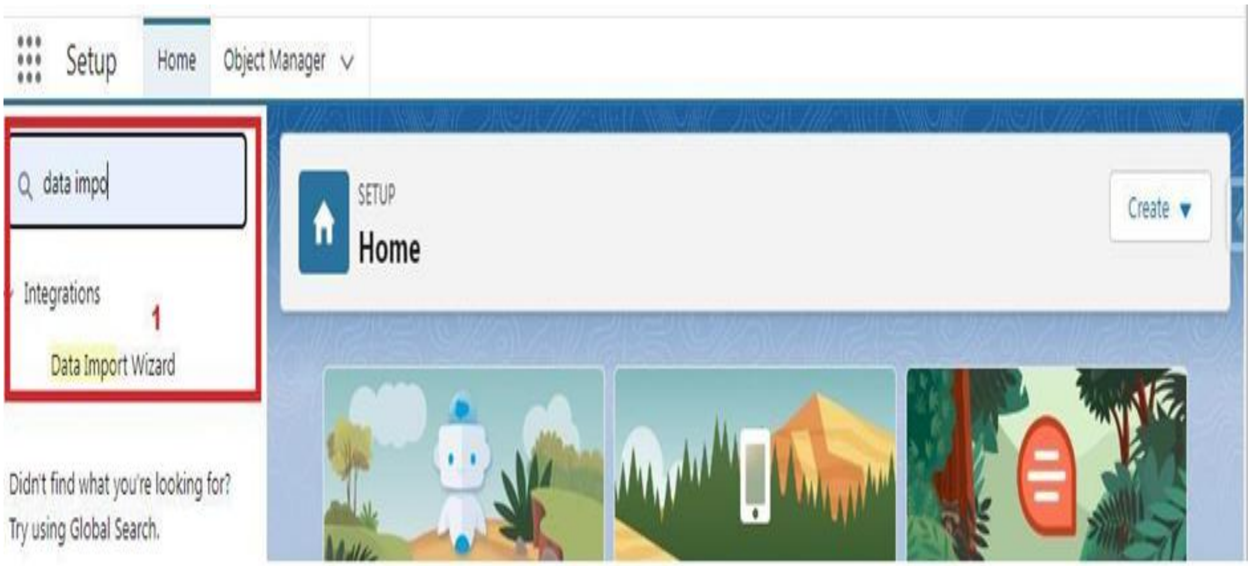
Activity 3: Delete a Record (Employee)

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.

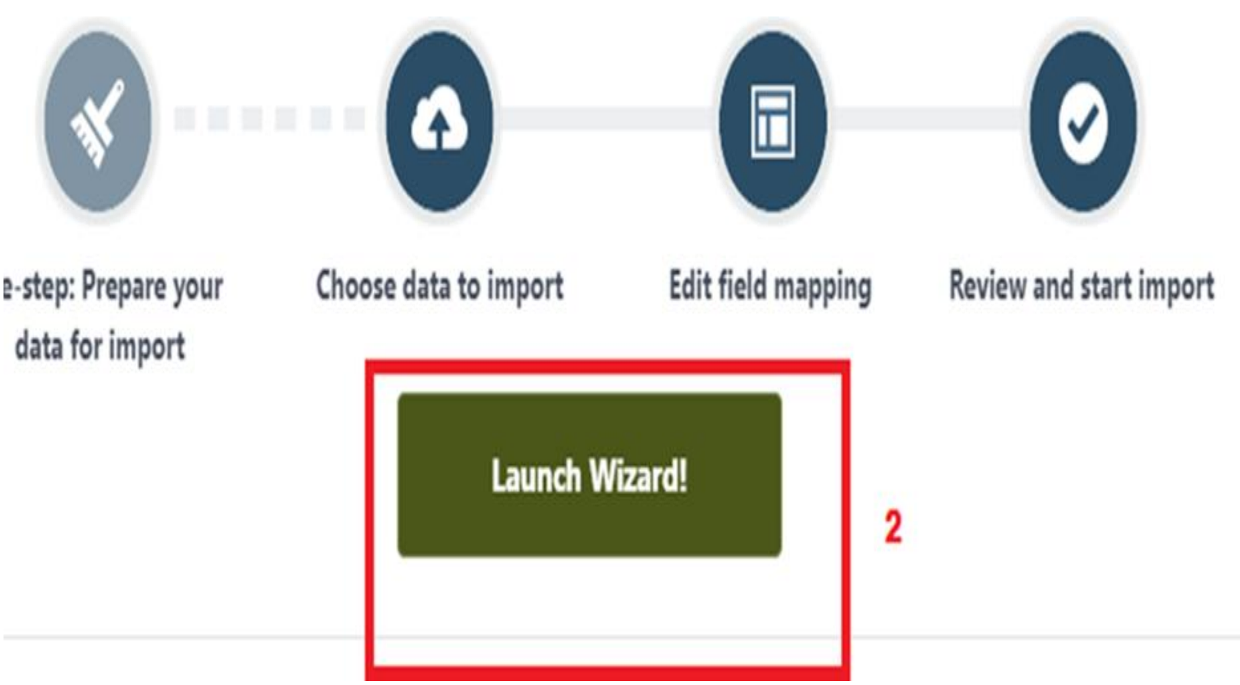
8.Import Data

Activity-1: Importing data using Data Wizard

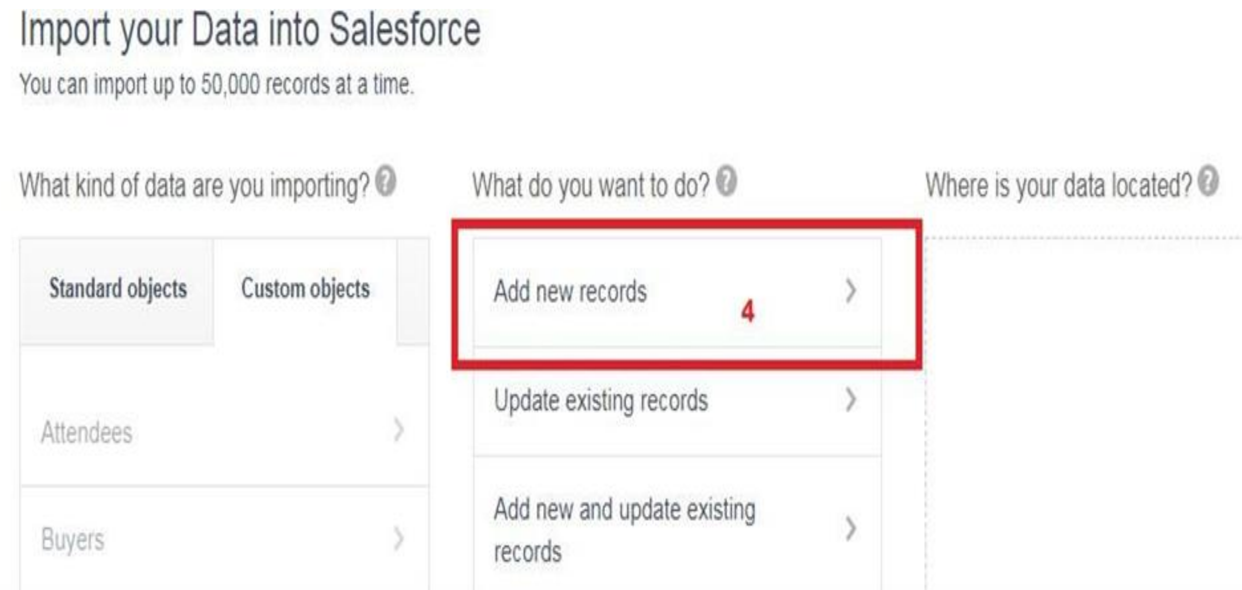
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



3. Click Launch Wizard!



4. Click the Custom Objects tab and select the Employee object.
5. Select Add new records.



6. Click CSV and choose file Employee_CSV which we made earlier. Click Next.
7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.
   Note: no need to map "Reports to" field. The Data Import Wizard is designed to handle basic data import tasks and does not support mapping relationships between records.

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

Click OK on the popup.
8.Scroll down the page and verify that your data has been imported under batches.
9.Make sure you have 0 records under the records failed column.

9.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:

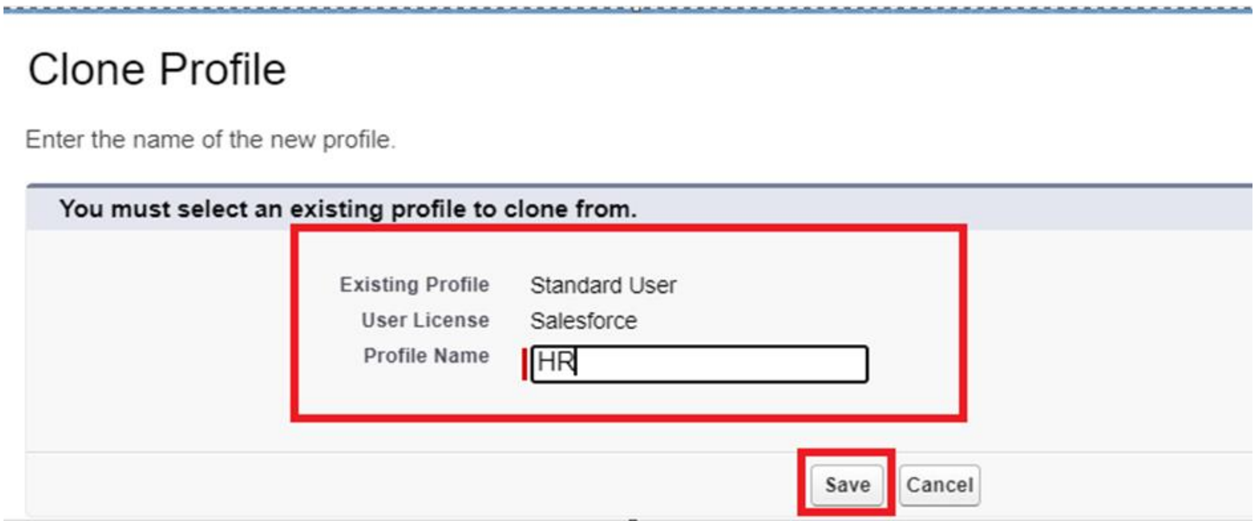
Custom ones defined by us.

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.

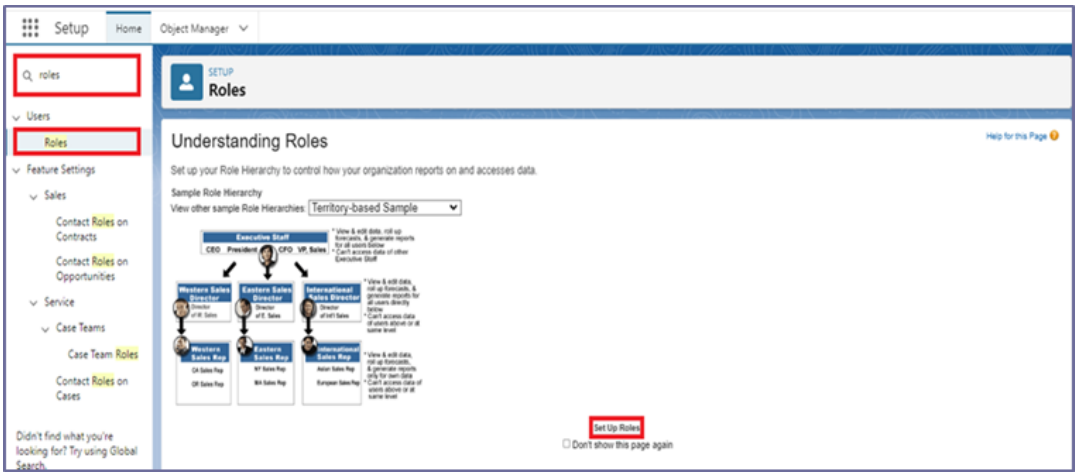
4. Scroll down and Click on Save.

10.Role

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

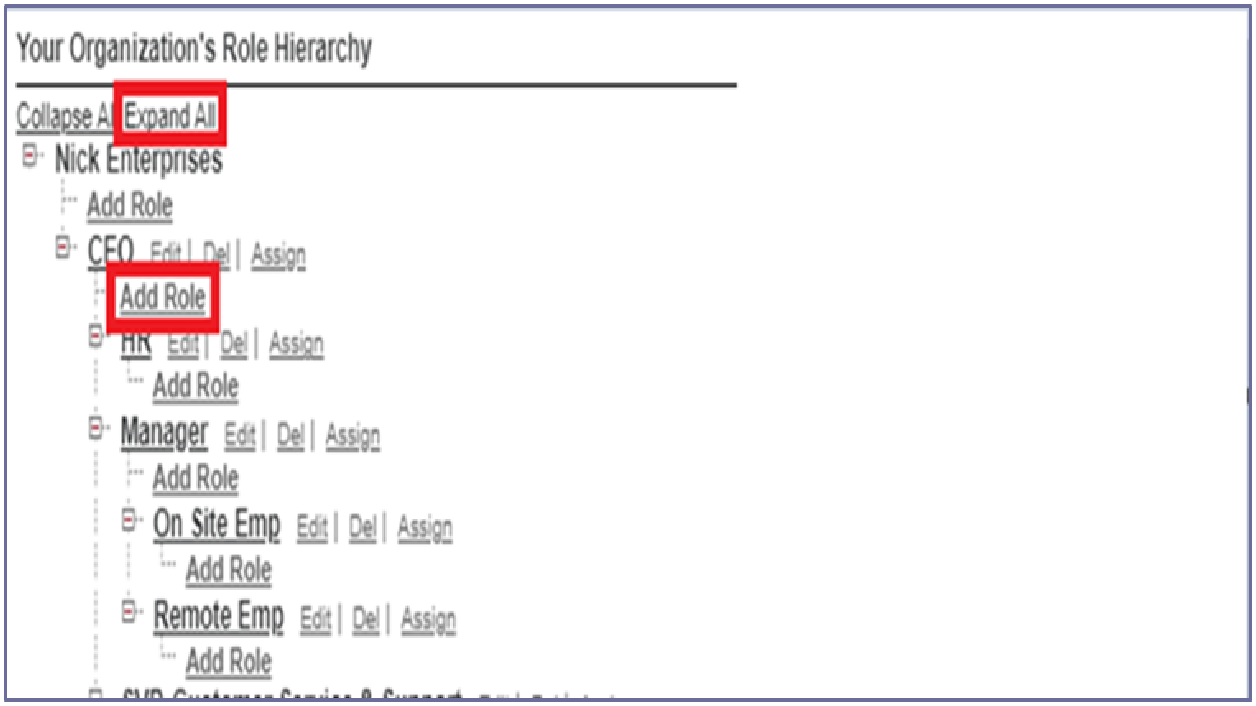
Activity 1: Creating HR Role

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

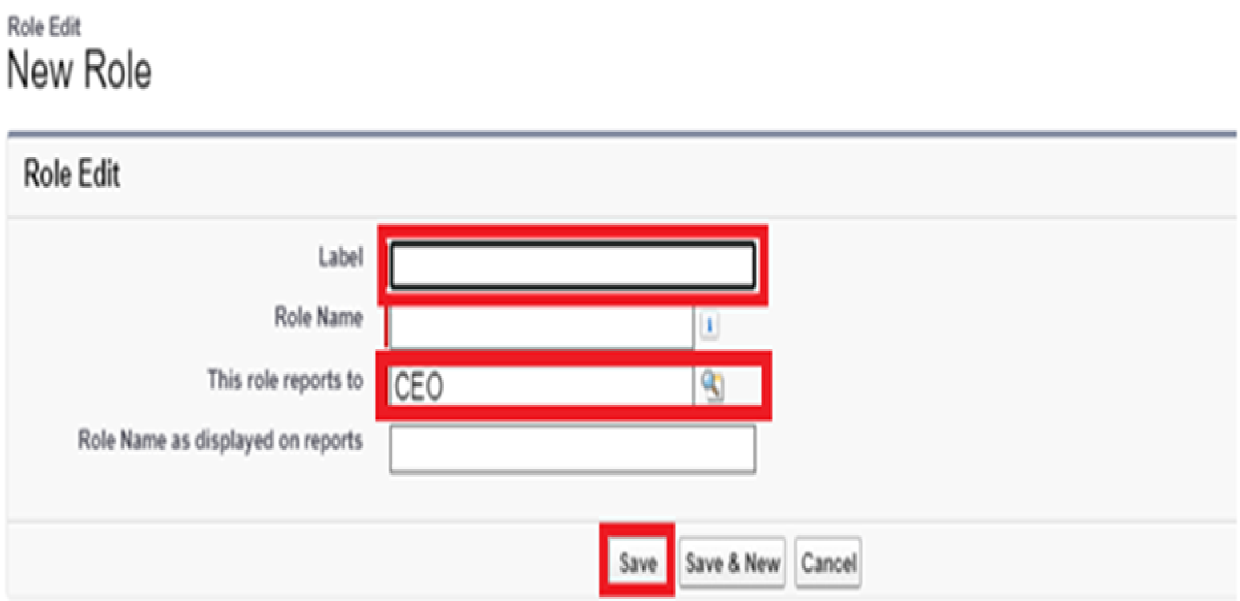


2. Click on Expand All and click on add role under whom this role works.

and



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



11.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:

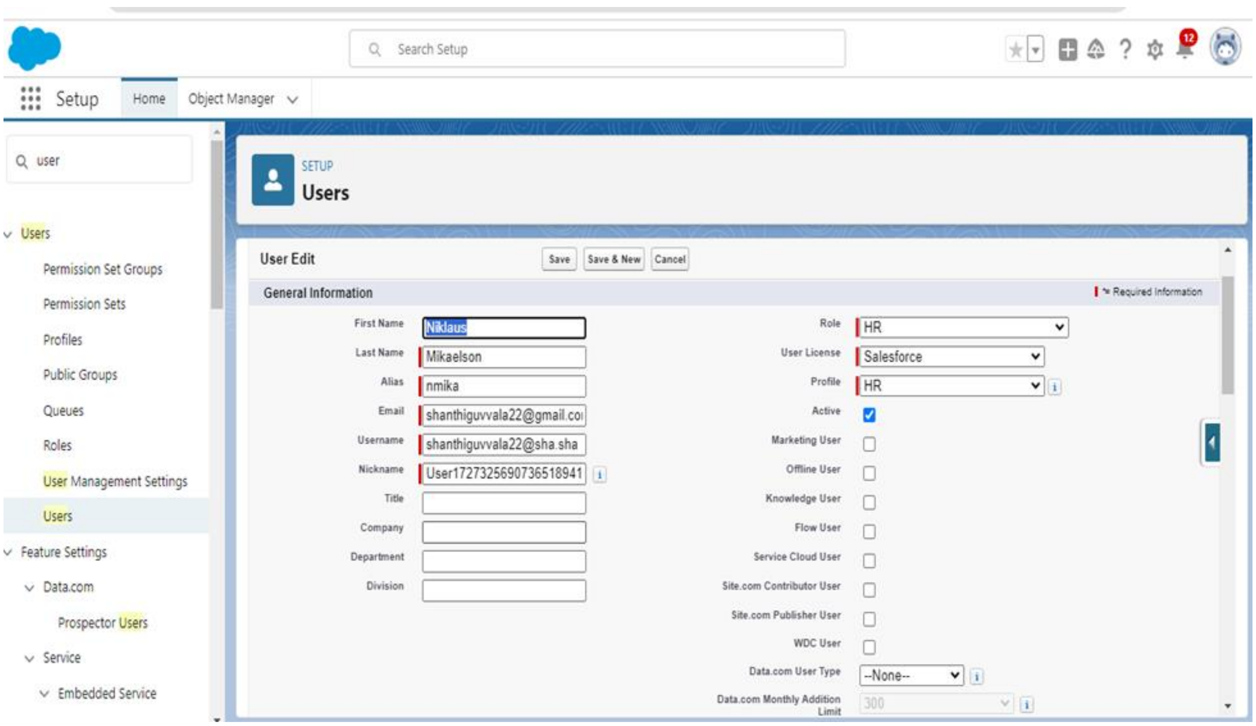
1. Username
2. Email Address
3. User's First Name (optional)
4. User's Last Name
5. Alias
6. Nickname
7. License
8. Profile
9. Role (optional)

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.

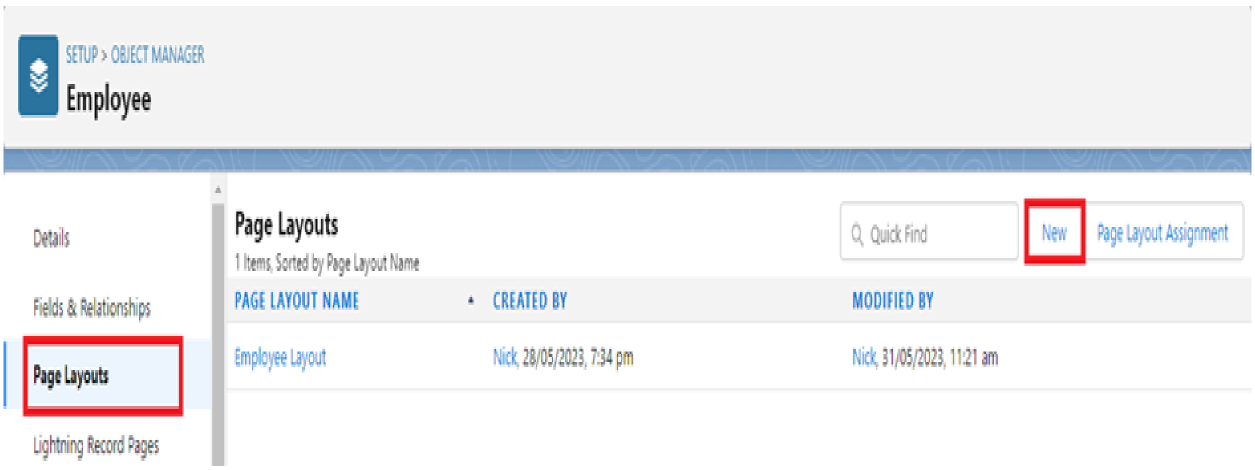
12.Page layouts

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

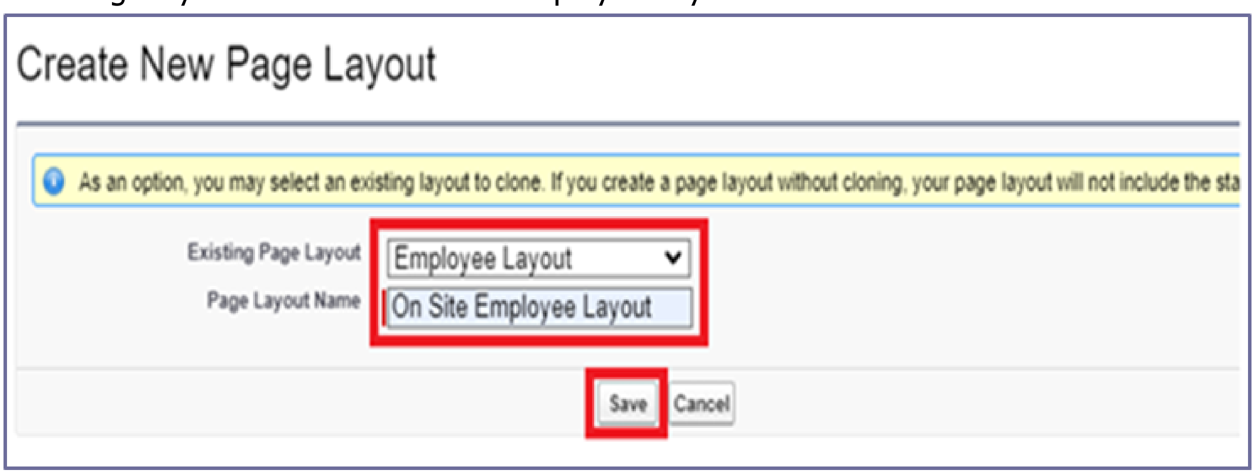
Activity 1 : creating a page layout for Employee object

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.

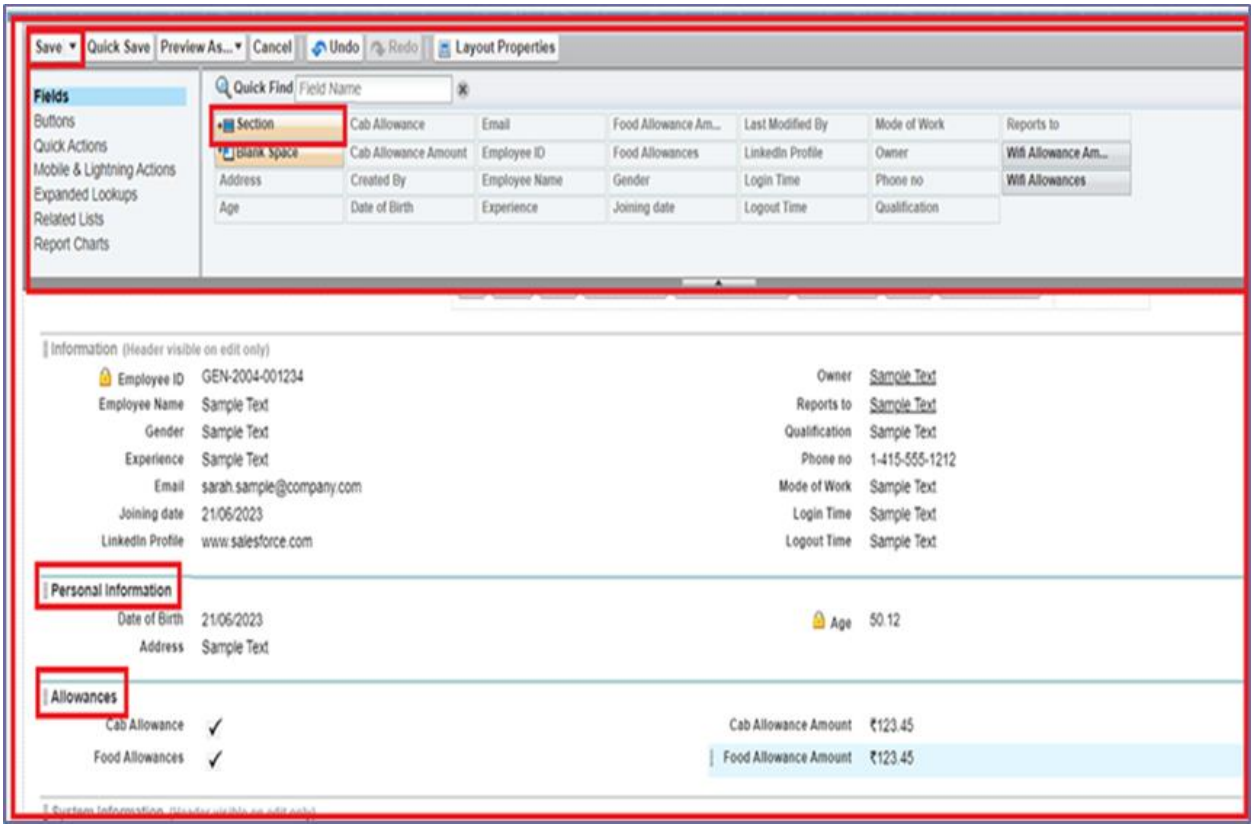


3. Give Page layout Name as "On Site Employee Layout" and click on Save.



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.

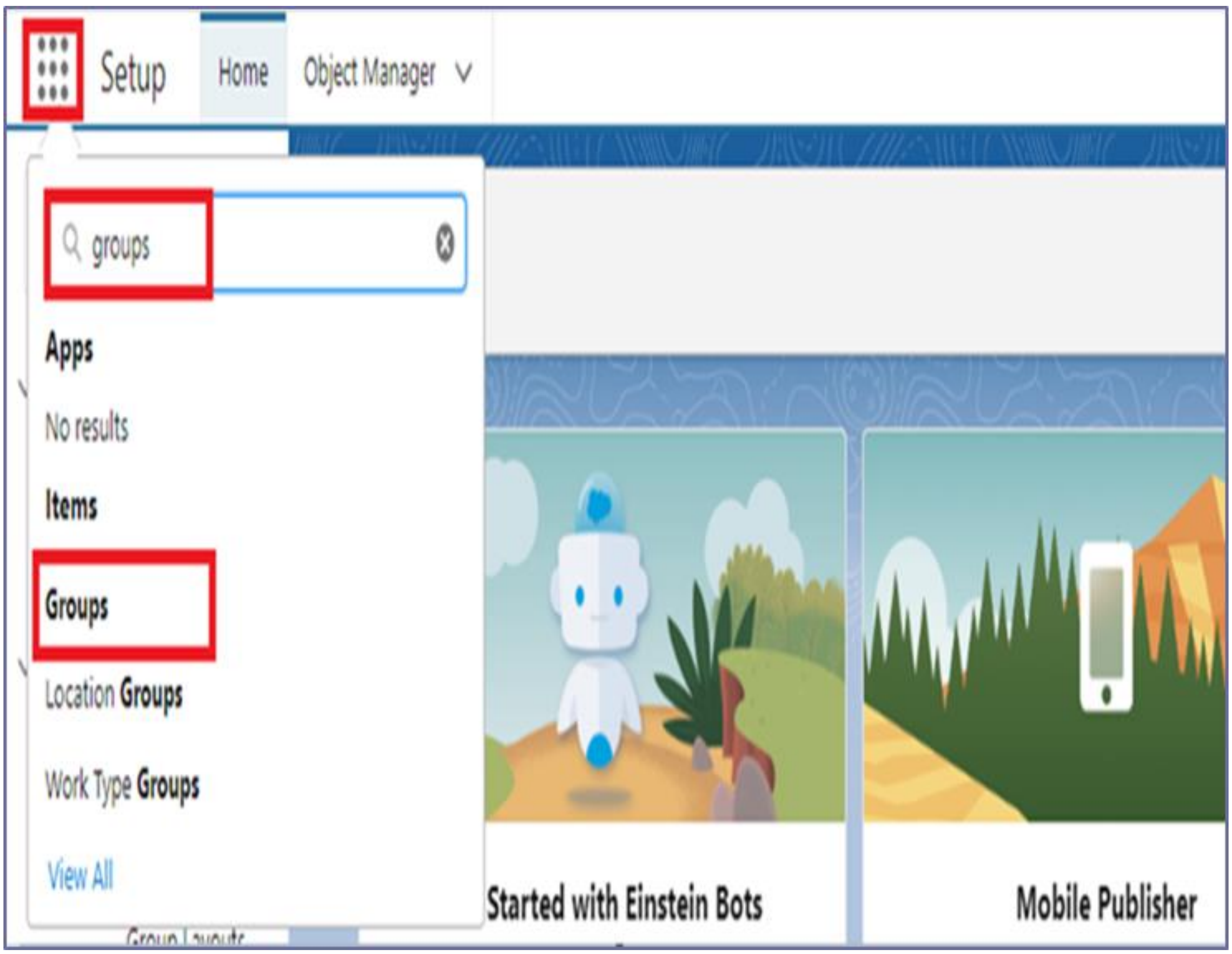
13.Chatter Group

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:

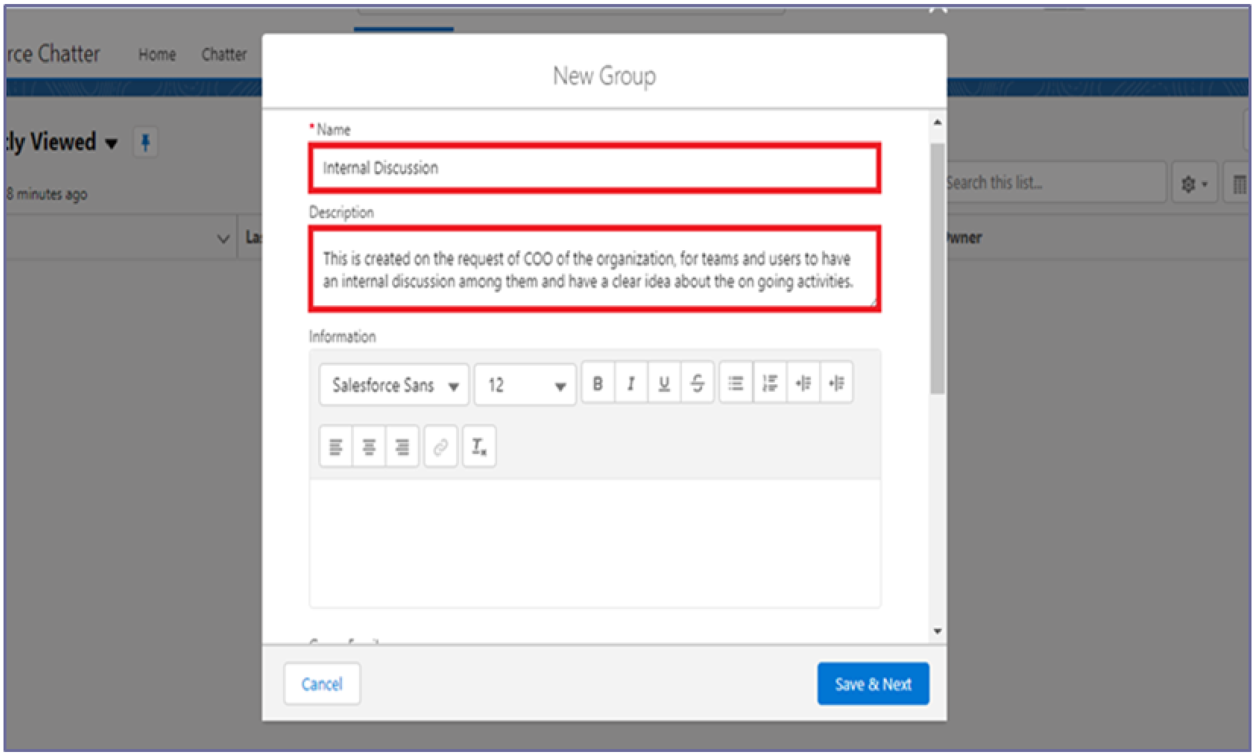
1. Click the App Launcher.
2. Enter Groups in the Search apps and items... box and select Groups.



3. Click New.

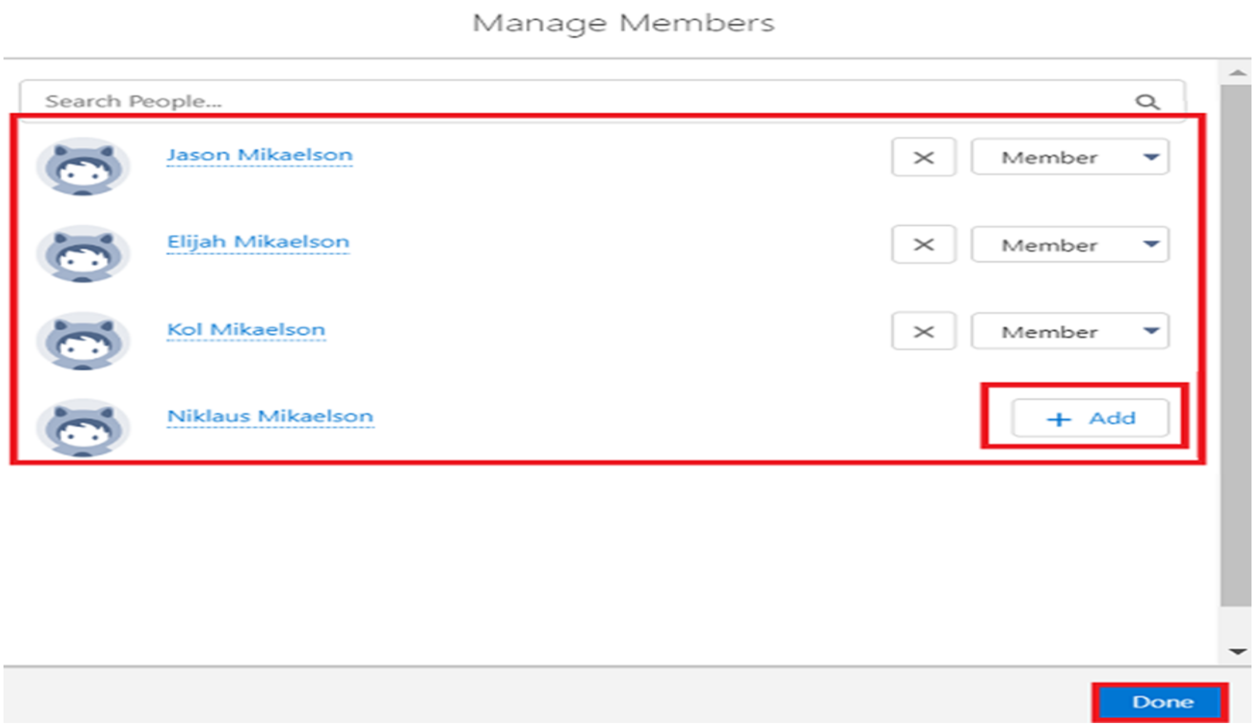
4. Fill in the new group information with these details:

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



5. Click Save & Next. Skip the Upload Picture section and click Next.

6. On the Manage Members screen, click Add next to users you created in the previous activity.



7. Click Done.
8. This is how your group interface looks like.
9. Where it says Share an update, post this message to the group: Welcome to the Internal Discussion Group, here you can post anything which is related to ongoing projects.
10. Click Share.

    Note: You can like or comment on this post.

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

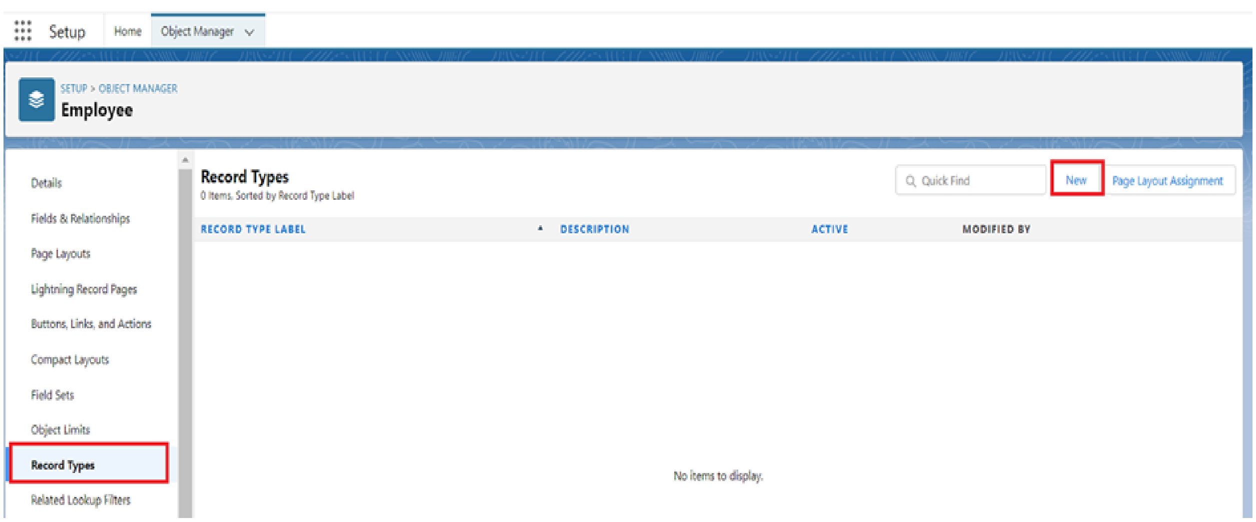
14.Record Types

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.

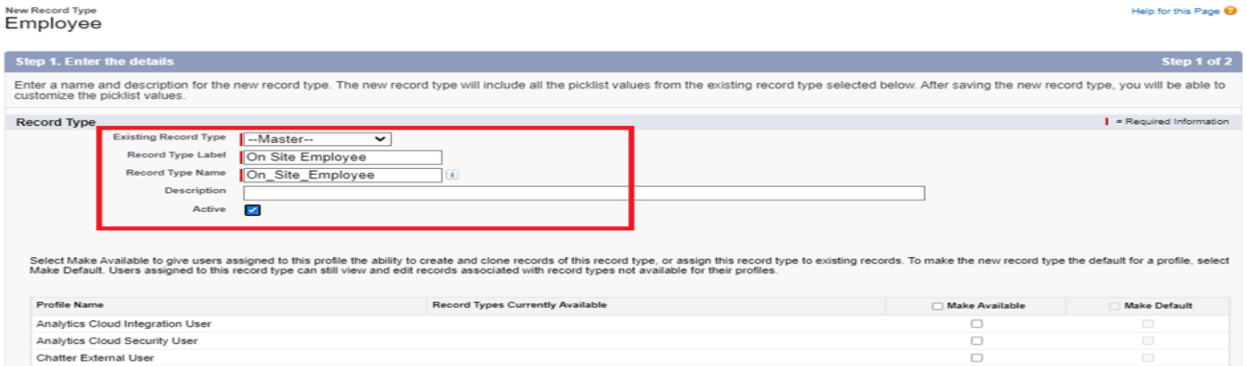
Activity 1: Creating On Site Employee Record Type

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.

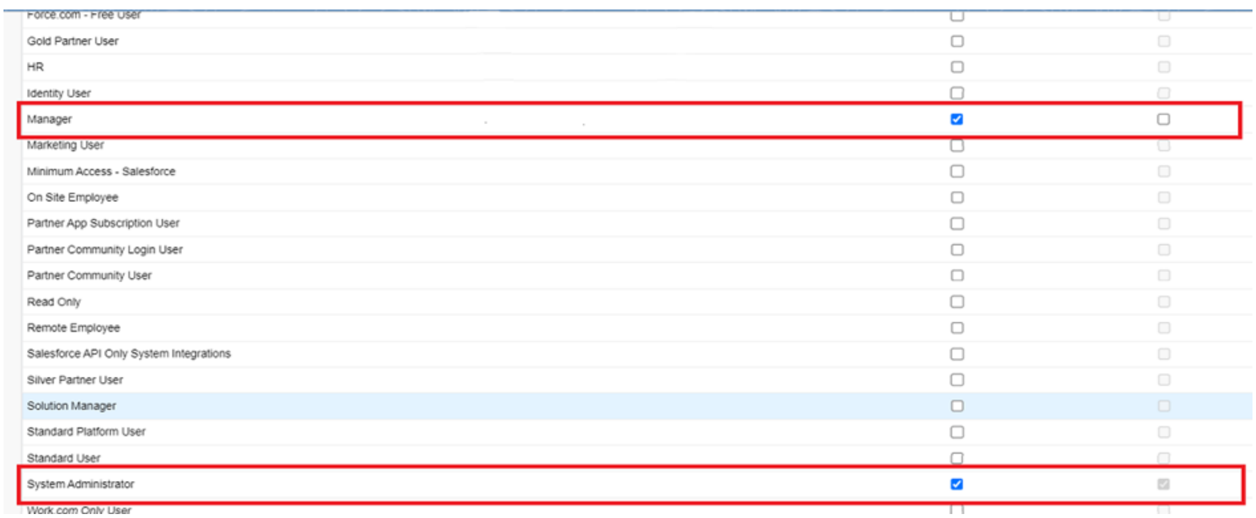


3. Give Record Type Label as “On Site Employee” and make it active.

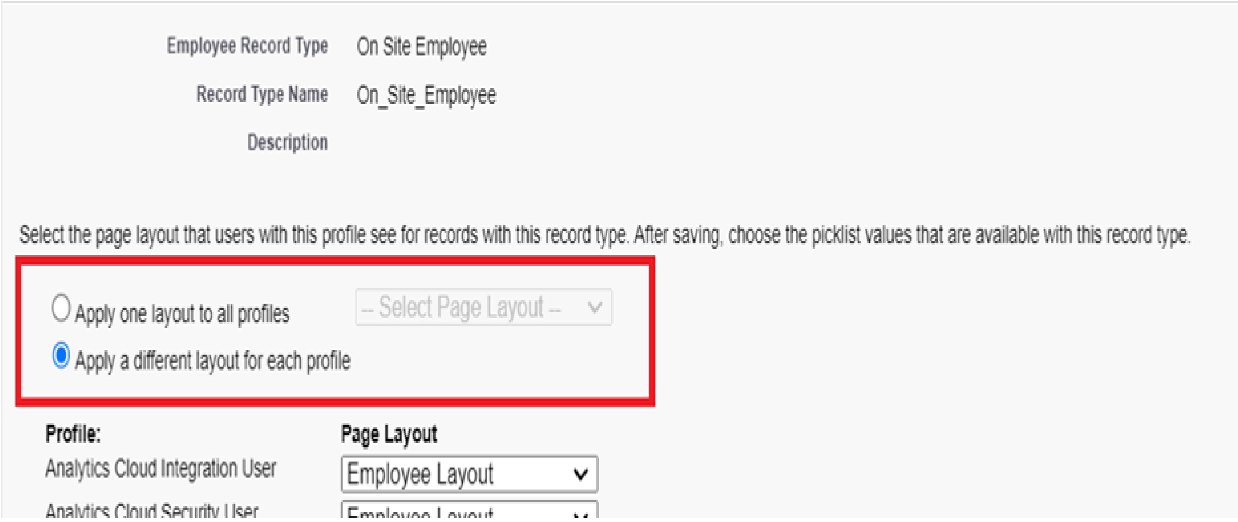


4. Uncheck for “Make Available”.

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



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



7. click Save.

15.Permission sets

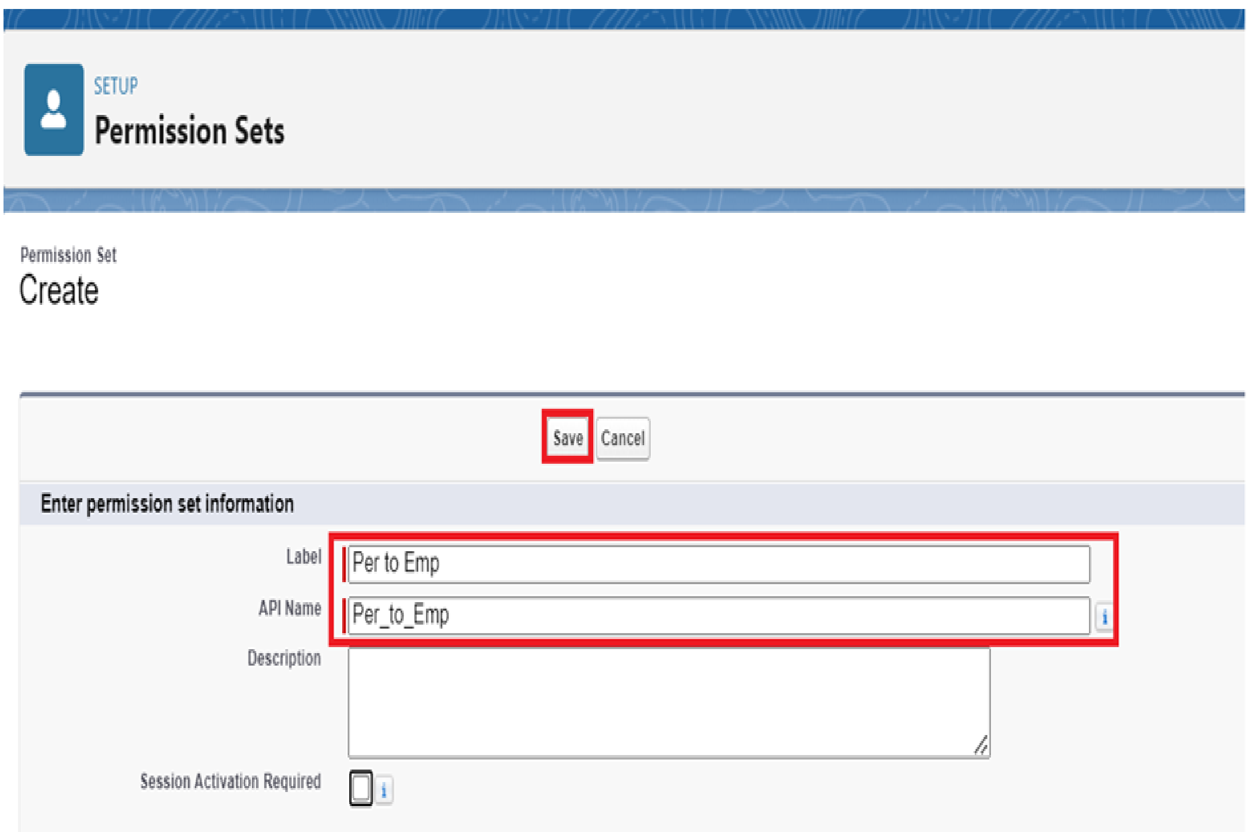
A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission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

Activity 1: Creating a permission set

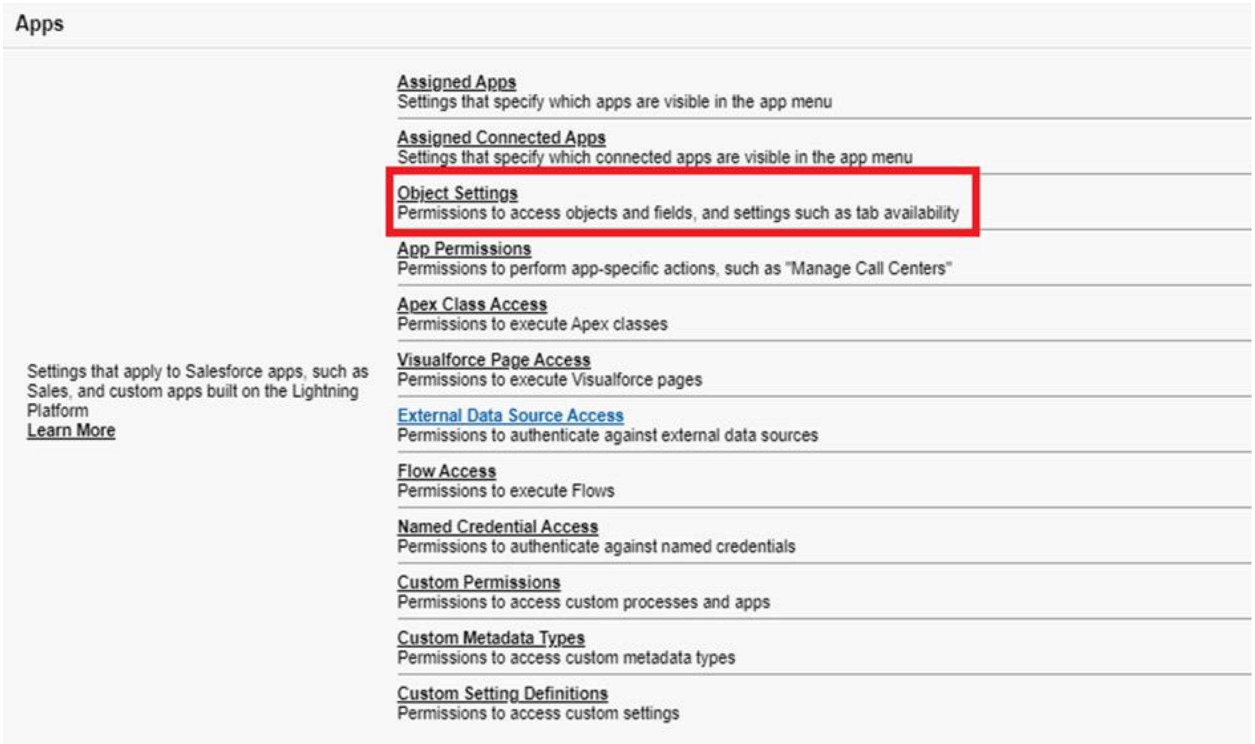
To Create a Permission Set:

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

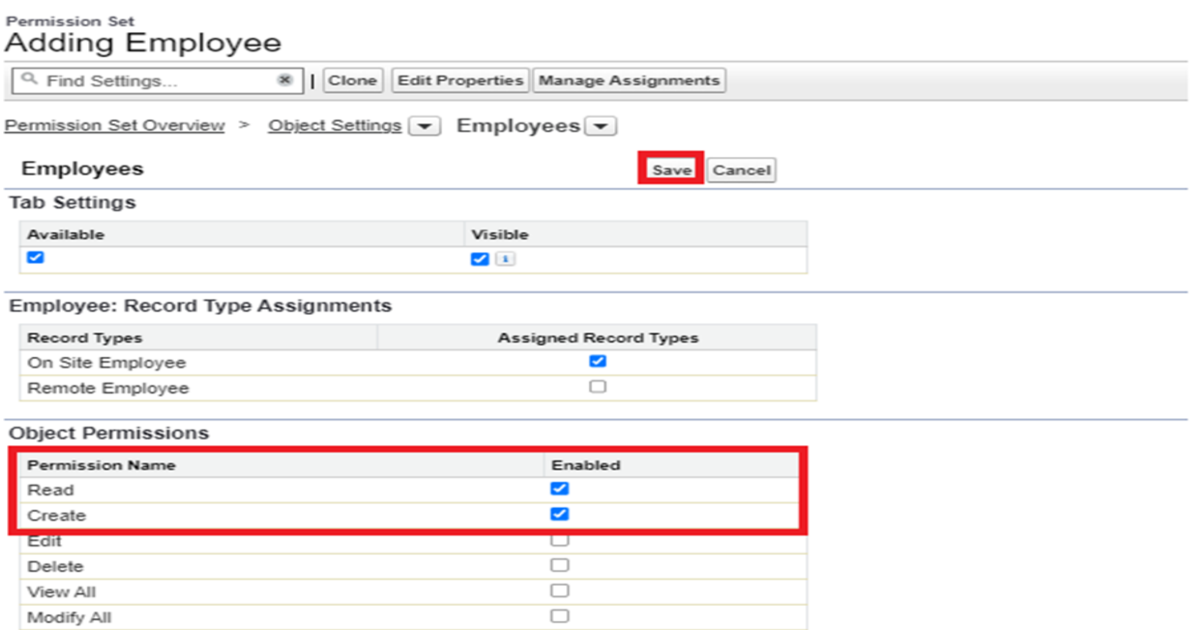
2. Enter the label name as "Per to Emp" --> Save.



3. Under Apps Select object settings.



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

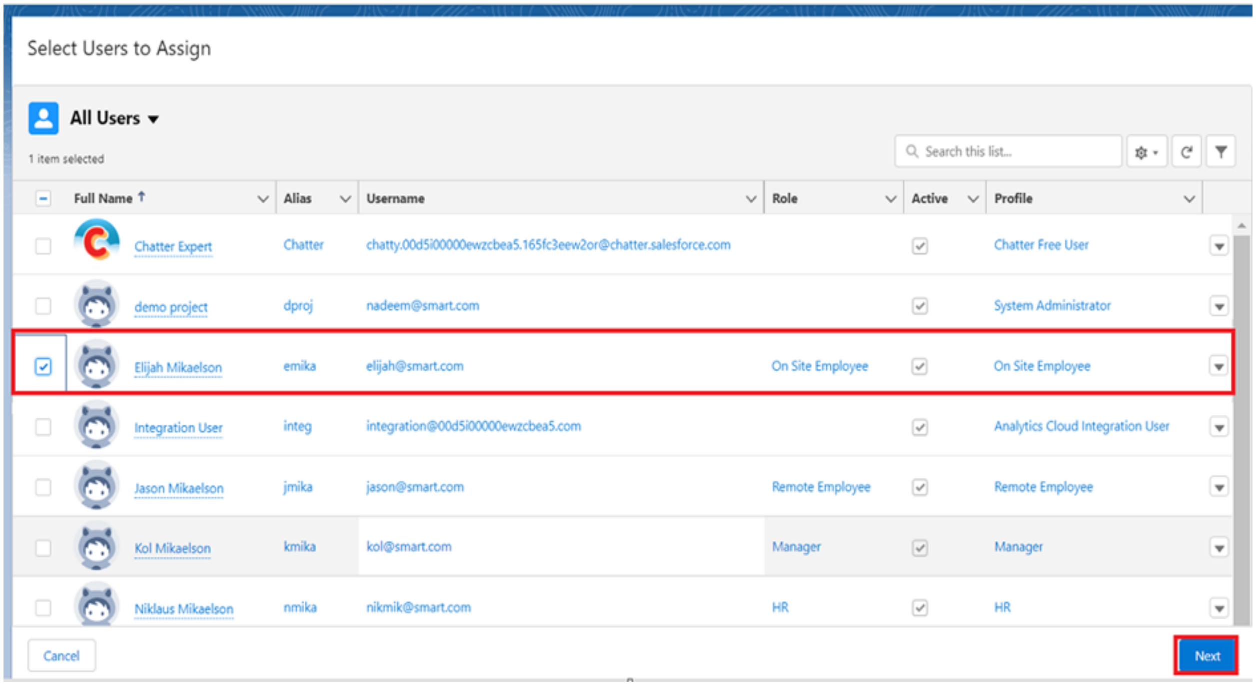


5. Click on Save.

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.

16.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.

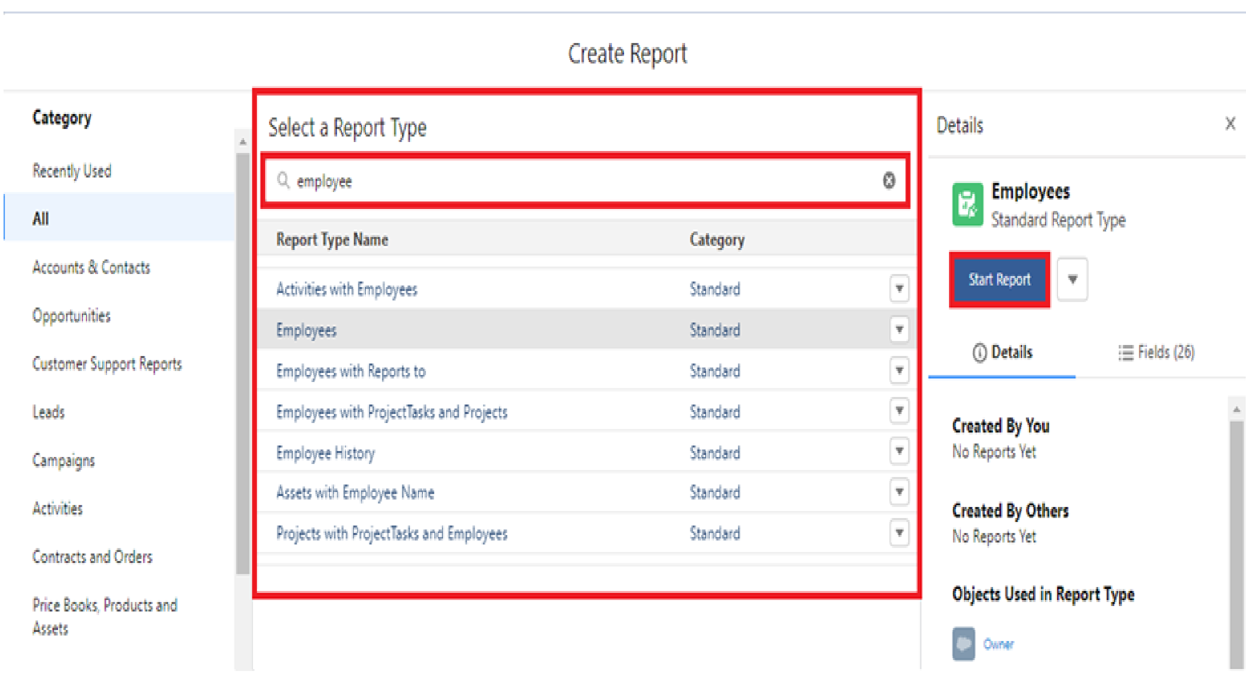
Types of Reports in Salesforce

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 reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel --> click on start report.



4. Customize your report

    --> Add fields from left pane as shown below

5. Save or run it.

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

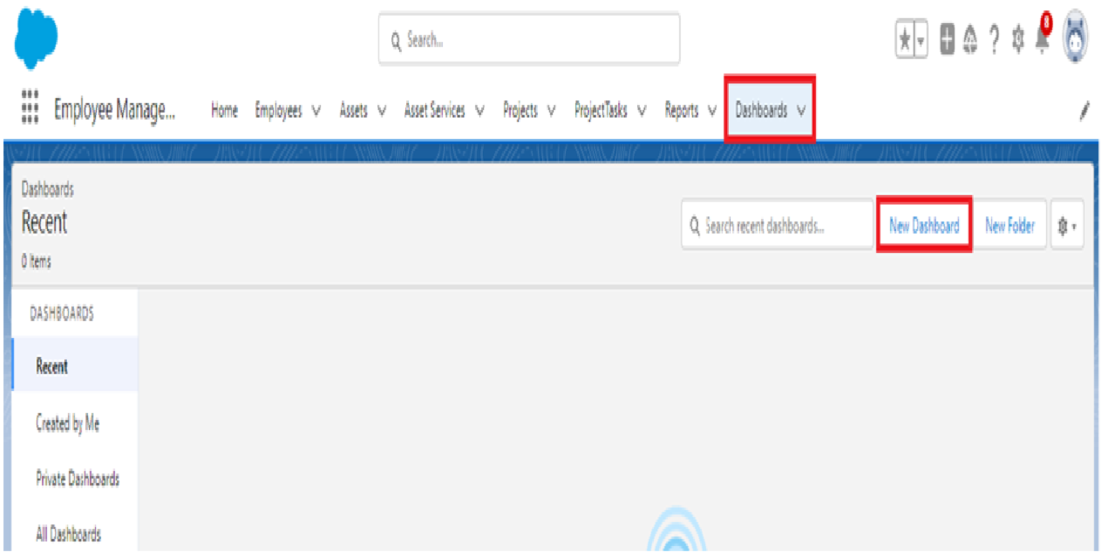
17.Dashboards

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.

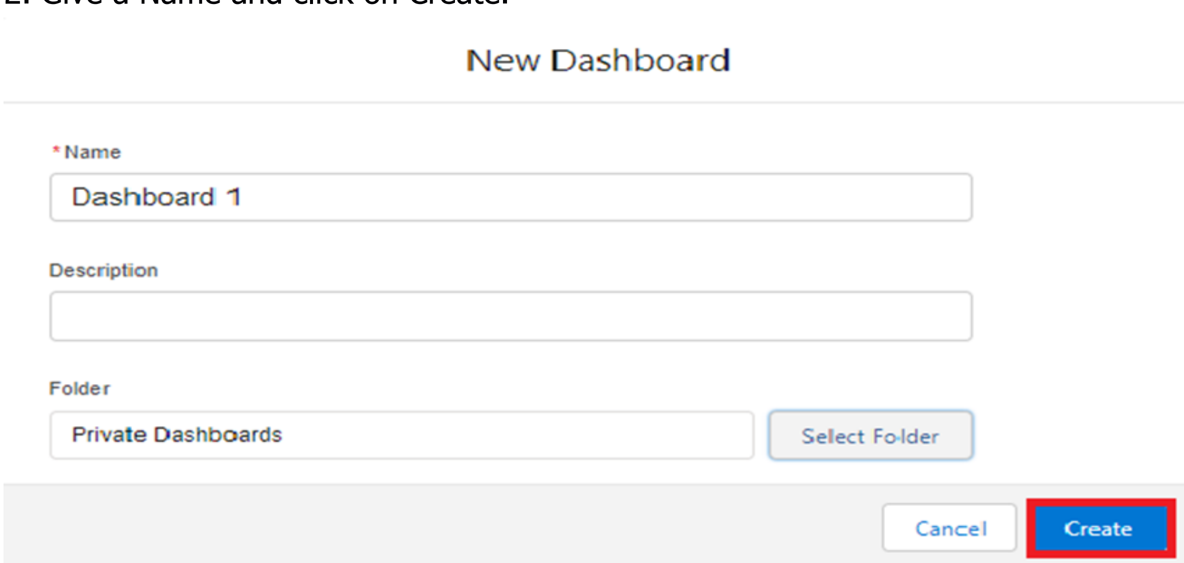
Activity 1: Create Dashboard

To Create a Dashboard

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

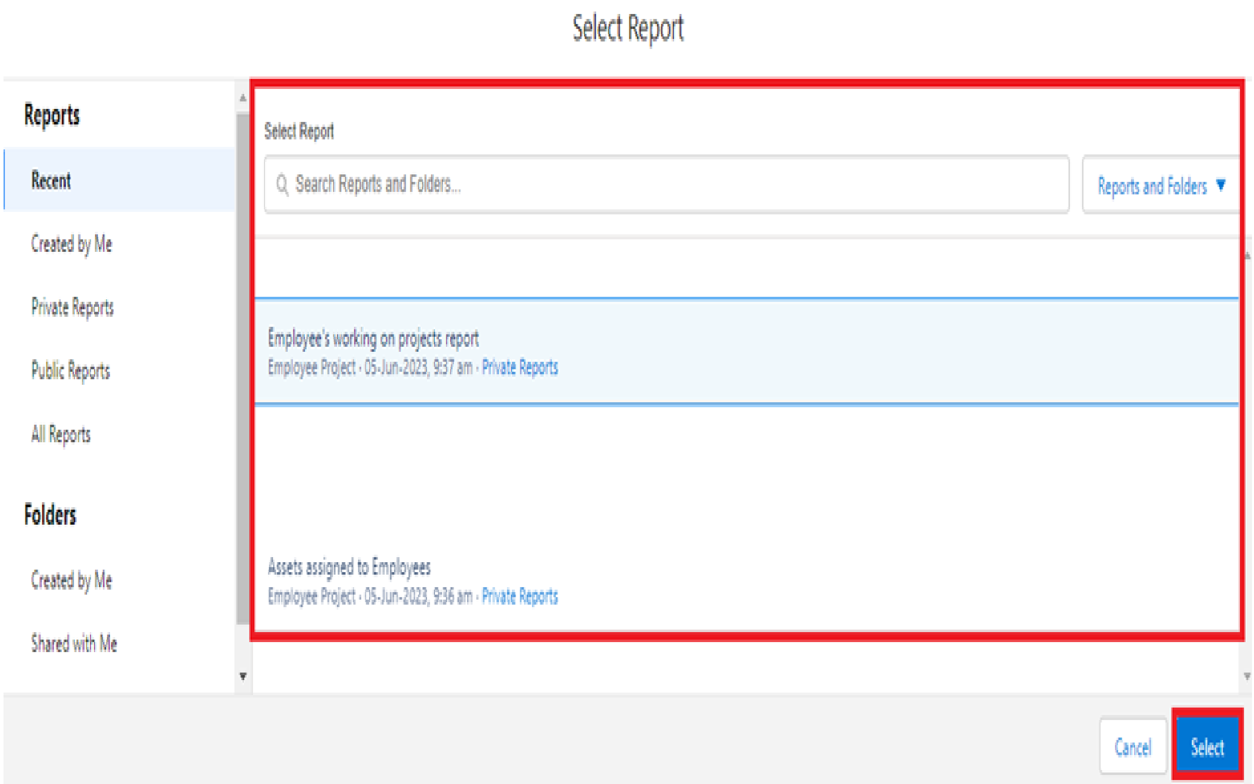


2. Give a Name and click on Create.



3. Select add component.

4. Select a Report and click on select.



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