ERM Hybrid Workforce Project – Phase 2

Phase 2: Org Setup & Configuration

Step 1: Define Clear Role Requirements

The first step was to define what each role—**Manager, Employee, and HR/Administrator**—should be able to do within the Salesforce system.

- **Manager**: Can monitor team engagement, approve hybrid work schedules, review feedback, and access detailed dashboards.
- **Employee**: Can manage their hybrid work schedules, submit feedback, access the knowledge base, and track their own tasks.
- **HR/Administrator**: Has full system access, manages onboarding, configures rules, monitors sentiment dashboards, and ensures compliance.

Step 2: Create or Confirm Profiles for Each Role

Profiles were created or confirmed by cloning standard profiles and customizing them:

- **Manager Profile**: Based on Standard User, extended with access to Reports, Dashboards, and Schedule Management.
- **Employee Profile**: Limited profile with controlled access to Tasks, Events, Feedback Objects, and Knowledge Base.
- **HR/Administrator Profile**: Based on System Administrator, but fine-tuned to handle HR operations and compliance monitoring.
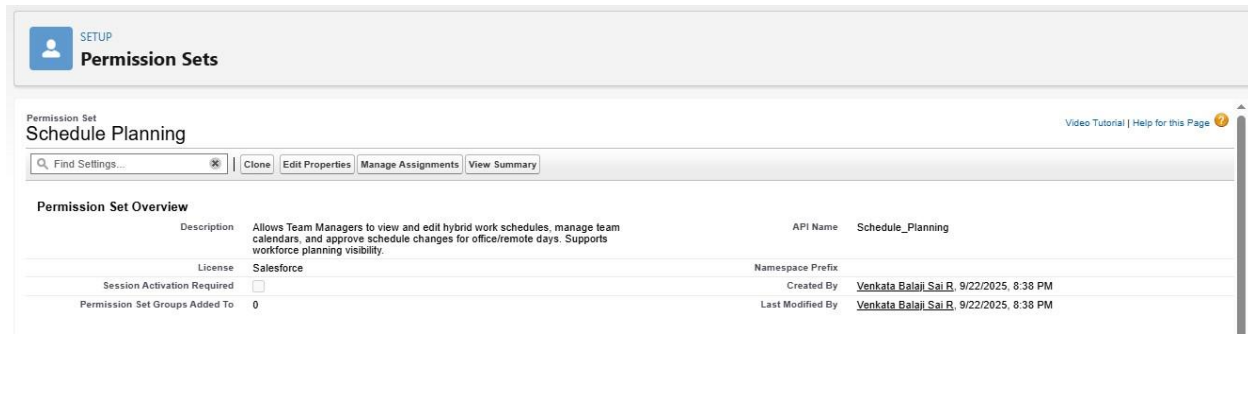
These profiles enforce clear role-based access to ensure employees can only access relevant data and functionality.

Step 3: Assign Object Access Permissions for Standard and Custom Objects

Custom and standard Salesforce objects were configured with CRUD permissions:

- **Managers**: Full CRUD on Schedules, Feedback, Tasks/Events, and Reports.
- **Employees**: Create & Read permissions on Feedback and Schedules, Read on Knowledge Articles, and limited Edit on their own records.

- **HR/Admins**: Full CRUD access on all objects, including Employee Data, Feedback Analytics, and Knowledge Base.
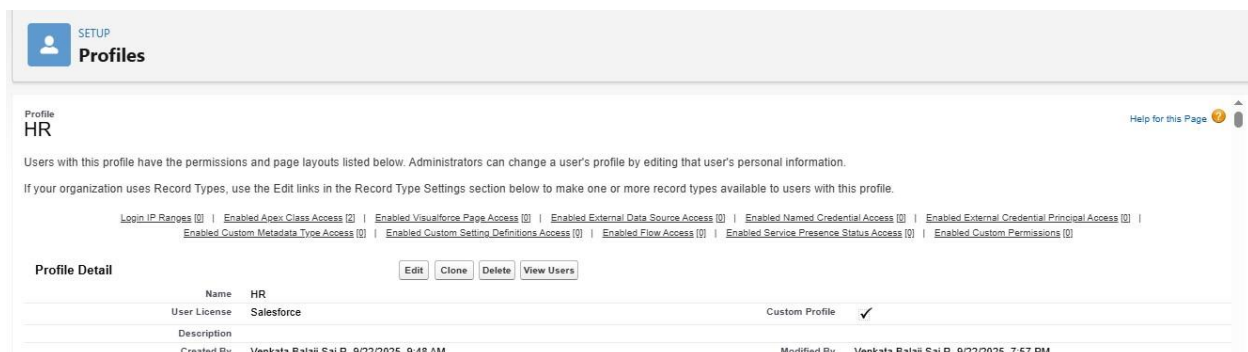

Step 4: Configure Field-Level Security

Field-level security was applied to ensure sensitive data is protected:

- **Managers**: Full access to team-related fields (work status, feedback trends) but restricted from personal HR data.
- **Employees**: Can only see/edit their own work schedule, feedback entries, and knowledge base access; restricted from others' data.
- **HR/Admins**: Complete visibility of all fields across Employee and Feedback objects, with control over sentiment analysis fields.

Step 5: Set Tab Visibility in Profiles

Tabs were customized for clarity of role functions:

- **Managers**: Dashboards, Reports, Employee Engagement, Hybrid Scheduling.
- **Employees**: My Schedule, My Feedback, Knowledge Base, My Tasks.
- **HR/Admins**: All tabs including Admin Console, Compliance, and AI Insights.

Step 6: Assign Profiles to Users

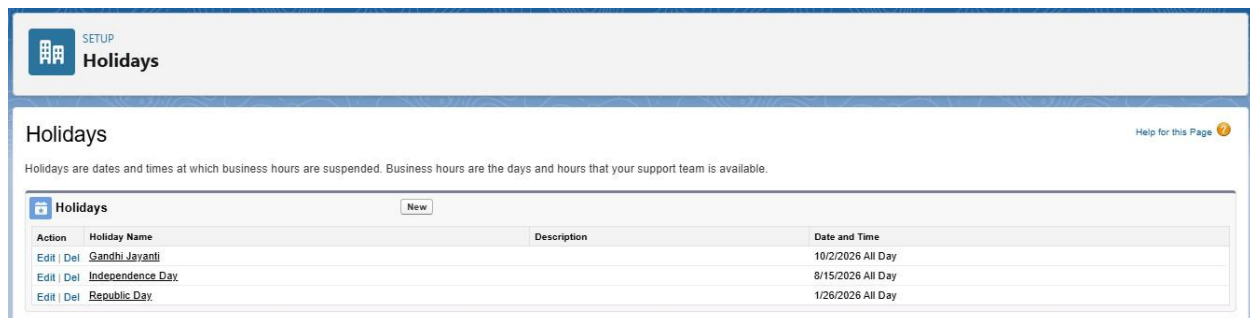Users were assigned profiles according to roles:

- Managers → Manager Profile
- Employees → Employee Profile
- HR/Admins → HR/Administrator Profile

Verification confirmed that users could not escalate their permissions or access beyond their assigned roles.

Step 7: Configure Business Hours and Holidays

Hybrid scheduling required accurate time settings:

- Business hours were configured to reflect flexible hybrid work timings.
- Company-wide holidays and weekends were added to prevent scheduling conflicts.
- Approval workflows were aligned to avoid triggering during non-working days.

Step 8: Setup Sharing Rules

Organization-wide defaults (OWD) were configured with strict privacy:

- **Employees**: Can only view/edit their own records.
- **Managers**: Can access records of employees reporting to them.
- **HR/Admins**: Full access across all records.

Role hierarchies and sharing rules ensure controlled access while maintaining collaboration.

Step 9: Test User Access

Testing was conducted using the "Login As" feature to simulate different roles:

- **Managers**: Successfully reviewed team schedules, engagement dashboards, and approvals.
- **Employees**: Could only manage their own feedback, schedules, and tasks.
- **HR/Admins**: Verified full control over configurations, reports, and compliance monitoring.

All access controls, tab visibility, and field-level restrictions worked as intended.

Phase 2 Completion Document.