

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.
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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.

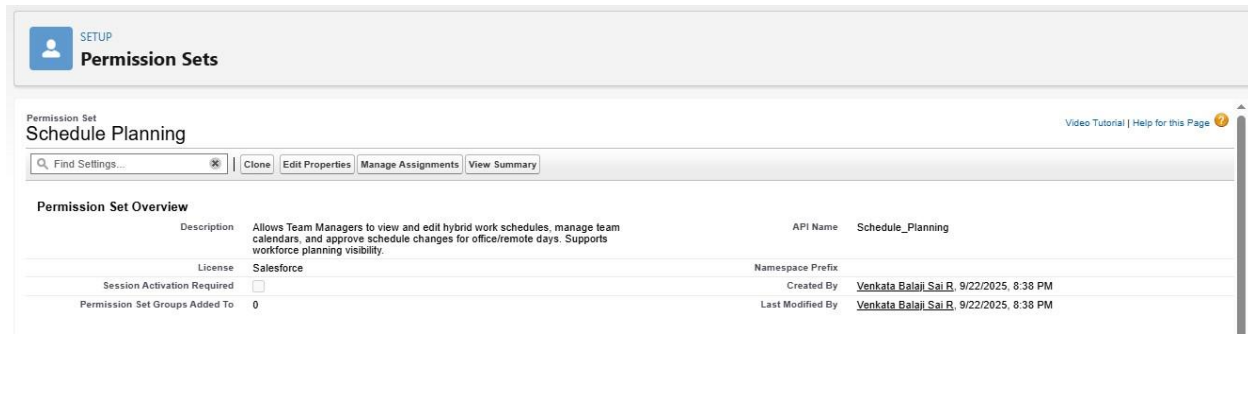
These profiles enforce clear role-based access to ensure employees can only access relevant data and functionality.

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.



The screenshot shows the 'Permission Sets' page in the Salesforce Setup menu. The 'Schedule Planning' permission set is selected. The overview shows it allows team managers to view and edit hybrid work schedules, manage team calendars, and approve schedule changes. The API Name is 'Schedule_Planning'. The license is 'Salesforce'. The session activation is required. The permission set groups added to is 0. The namespace prefix is 'Venkata_Balaji_Sai_R'. The created by and last modified by are 'Venkata_Balaji_Sai_R' on 9/22/2025 at 8:38 PM.

Step 4: Configure Field-Level Security

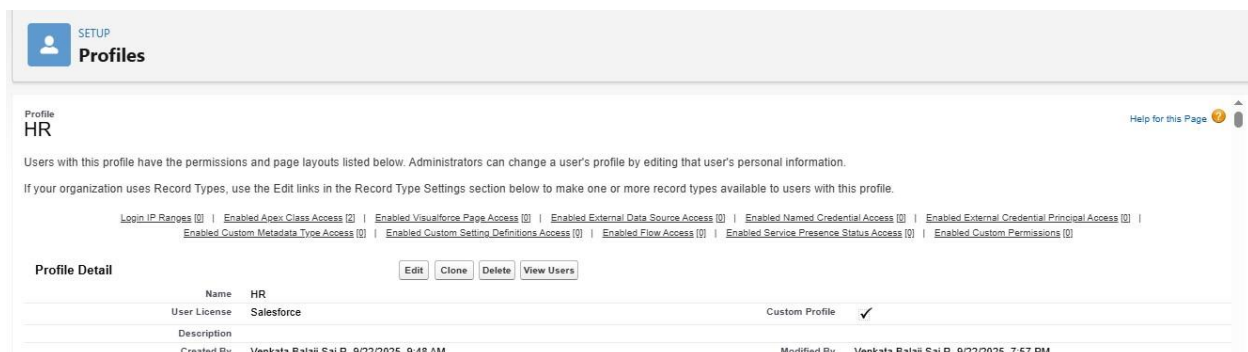
Field-level security was applied to ensure sensitive data is protected:

- **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.



The screenshot shows the 'Profiles' page in the Salesforce Setup menu. The 'HR' profile is selected. The profile detail shows the name 'HR', user license 'Salesforce', and custom profile status 'Custom Profile' with a checkmark. The description is empty. The created by and last modified by are 'Venkata_Balaji_Sai_R' on 9/22/2025 at 9:48 AM and 7:57 PM respectively. The profile detail also shows a list of enabled features: Login IP Ranges, Enabled Apex Class Access, Enabled Visualforce Page Access, Enabled External Data Source Access, Enabled Named Credential Access, Enabled External Credential Principal Access, Enabled Custom Metadata Type Access, Enabled Custom Setting Definitions Access, Enabled Flow Access, Enabled Service Presence Status Access, and Enabled Custom Permissions.

Step 6: Assign Profiles to Users

Users were assigned profiles according to roles:

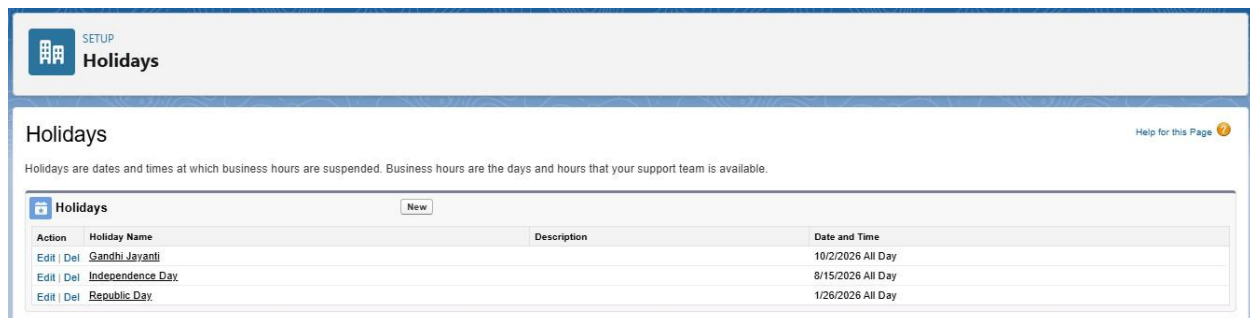
- Managers → Manager Profile
- Employees → Employee Profile
- HR/Admins → HR/Administrator Profile

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.