

# WORKFORCE ADMINISTRATOR & DEVELOPER SOLUTION

By

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## **Project Abstract:**

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.

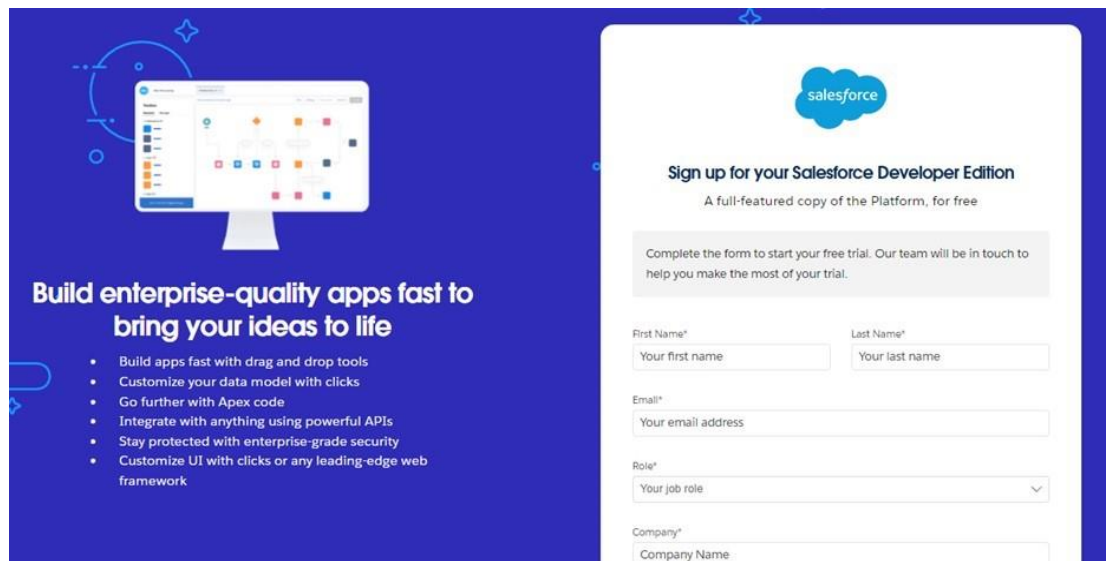
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## INTRODUCTION

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. In an effort to enhance data security and performance while simplifying system administration, Workforce Administration Solution is transitioning to Salesforce, a new cloud technology. By leveraging this advanced platform, the company can ensure the safe storage of sensitive data through robust encryption and proactive backup mechanisms. The cloud's automated data replication capabilities provide added protection and efficient disaster recovery solutions. With access to scalable resources, Workforce Administration Solution can optimize performance, ensuring fast and reliable access to data. This shift to the new cloud technology streamlines administrative tasks, reducing complexity and allowing system administrators to focus on higher-value activities, ultimately increasing productivity and enhancing overall operational efficiency.

# Task 1: Salesforce



The image shows a promotional banner for Salesforce on the left and a sign-up form on the right. The banner features a computer monitor displaying a Salesforce interface and the text: "Build enterprise-quality apps fast to bring your ideas to life". Below this, a list of features is provided: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". The sign-up form is titled "Sign up for your Salesforce Developer Edition" and includes the subtext "A full-featured copy of the Platform, for free". It contains a message: "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form fields are: "First Name\*", "Last Name\*", "Email\*", "Role\*" (a dropdown menu), and "Company\*" (with a "Company Name" label below it).

**Build enterprise-quality apps fast to bring your ideas to life**

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

**Sign up for your Salesforce Developer Edition**  
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name\*  
Your first name

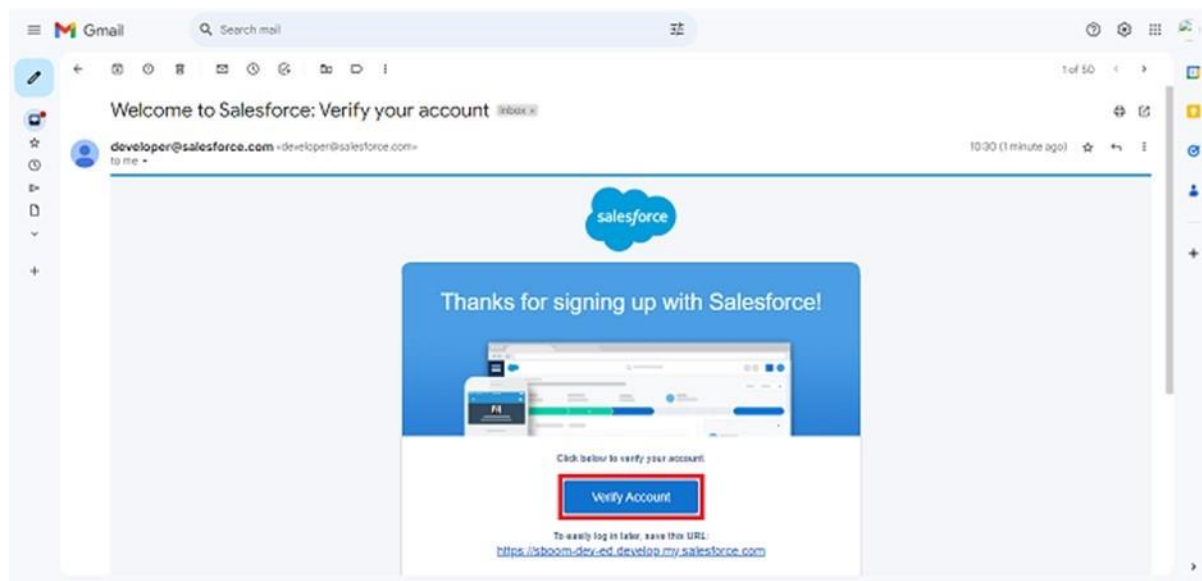
Last Name\*  
Your last name

Email\*  
Your email address

Role\*  
Your job role

Company\*  
Company Name

## Activity 1: Creating Developer Account



## Activity 2: Account Activation

# Task 2: Object

The screenshot displays the 'Employees' object page in the Workforce Admin console. The top navigation bar includes the 'Workforce Administ...' title and a search bar. The main header shows the 'Employees' object with a 'Recently Viewed' filter. The table below lists one item with the label 'EMS-0001' and the column 'Employee Id'. The table is currently empty except for the header row.

	Employee Id
1	EMS-0001

Activity - Create 5 objects with label names as Employees, Projects, ProjectTasks, Assets, Asset Services.

# Task 3: Tabs

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, showing 'User Interface' and 'Rename Tabs and Labels'. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a description of custom tabs and three sections: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. The 'Custom Object Tabs' section contains a table with columns for Action, Label, Tab Style, and Description. The table lists five tabs: Assets, Asset Services, Employees, Projects, and ProjectTasks, each with a corresponding icon and style. The 'Web Tabs' and 'Visualforce Tabs' sections are currently empty, indicating no tabs have been defined.

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	Assets	Castle	
<a href="#">Edit</a>   <a href="#">Del</a>	Asset Services	Jewel	
<a href="#">Edit</a>   <a href="#">Del</a>	Employees	Hammer	
<a href="#">Edit</a>   <a href="#">Del</a>	Projects	Apple	
<a href="#">Edit</a>   <a href="#">Del</a>	ProjectTasks	Chess piece	

Activity: Creating 5 Custom Tabs - Employees, Projects, ProjectTasks, Assets, Asset Services.

# Task 4: The Lightning App

The screenshot shows the Salesforce Lightning Experience App Manager. At the top, there are buttons for 'New Lightning App' and 'New Connected App'. Below the header, there is a table listing 23 items, sorted by App Name. The table has columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The last item in the list, 'Workforce Administration Solution', is highlighted with a red box.

App Name	Developer Name	Description	Last Modified	App Type	Visibility
Sales	LightningSales	Manage your sales process with accounts, leads, ...	28/07/2024, 10:55 pm	Lightning	✓
Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with ...	28/07/2024, 10:55 pm	Lightning	✓
Salesforce Chatter	Chatter	The Salesforce Chatter social network, including ...	28/07/2024, 10:55 pm	Classic	✓
Salesforce Schedul...	LightningScheduler	Set up personalized appointment scheduling.	28/07/2024, 10:57 pm	Lightning	✓
Service	Service	Manage customer service with accounts, contact...	28/07/2024, 10:55 pm	Classic	✓
Service Console	LightningService	(Lightning Experience) Lets support agents work ...	28/07/2024, 10:55 pm	Lightning	✓
Site.com	Sites	Build pixel-perfect, data-rich websites using the ...	28/07/2024, 10:55 pm	Classic	
Subscription Mana...	RevenueCloudConsole	Get started automating your revenue processes	28/07/2024, 10:55 pm	Lightning	✓
Workforce Adminis...	Workforce_Administrat...		29/07/2024, 1:06 am	Lightning	✓

Activity : Create a Lightning App - Workforce Administration Solution.

# Task 5: Fields & Relationships

Setup Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Employee**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

**Fields & Relationships**  
26 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

Address	Address__c	Text Area(255)	
Age	Age__c	Formula (Number)	
Cab Allowance	Cab_Allowance__c	Checkbox	
Cab Allowance Amount	Cab_Allowance_Amount__c	Currency(18, 0)	
Created By	CreatedById	Lookup(User)	
Date of Birth	Date_of_Birth__c	Date	
Email	Email__c	Email	
Employee ID	Name	Auto Number	✓
Employee Name	Employee_Name__c	Text(18)	
Experience	Experience__c	Text Area(255)	
Food Allowance Amount	Food_Allowance_Amount__c	Currency(18, 0)	
Food Allowances	Food_Allowances__c	Checkbox	
Gender	Gender__c	Picklist	
Joining date	Joining_date__c	Date	
Last Modified By	LastModifiedById	Lookup(User)	
Login Time	Login_Time__c	Time	
Logout Time	Logout_Time__c	Time	
Mode of Work	Mode_of_Work__c	Picklist	
Owner	OwnerId	Lookup(User,Group)	✓
Phone no	Phone_no__c	Phone	
Qualification	Qualification__c	Text(18)	
Qualification	Qualification__c	Text(18)	
Record Type	RecordTypeId	Record Type	✓
Reports to	Reports_to__c	Lookup(Employee)	✓
Wifi Allowance Amount	Wifi_Allowance_Amount__c	Currency(18, 0)	
Wifi Allowances	Wifi_Allowances__c	Checkbox	

Activity: Creating fields in Employees object

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

**Project**

Details

**Fields & Relationships** 9 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Project ID	Name	Auto Number		✓
Project Lead	Project_Lead__c	Text(18)		
Product Name	Product Name	Text(18)		

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Activity: creating fields in projects object

Setup > OBJECT MANAGER

**ProjectTask**

Details

**Fields & Relationships** 7 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Employee Name	Employee_Name__c	Master-Detail(Employee)		✓
Finishes in	Finishes_in__c	Formula (Number)		
Last Modified By	LastModifiedById	Lookup(User)		
Project Task	Project_Task__c	Master-Detail(Project)		✓
ProjectTask Name	Name	Text(80)		✓
Working Hours	Working_Hours__c	Number(18, 0)		

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Activity: creating fields in ProjectTasks object.



Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

### Asset

Details

**Fields & Relationships** 8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Asset Name	Name	Text(80)		✓
Asset Type	Asset_Type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Date Of Issue	Date_Of_Issue__c	Formula (Date)		
Employee Name	Employee_Name__c	Lookup(Employee)		✓
Last Modified By	LastModifiedById	Lookup(User)		

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Activity: creating fields in Assets object.

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

### Asset Service

Details

**Fields & Relationships** 9 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Asset Id	Asset_Id__c	Lookup(Asset)		✓
Asset Service Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Description	Description__c	Long Text Area(32768)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Subject	Subject__c	Text Area(255)		

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

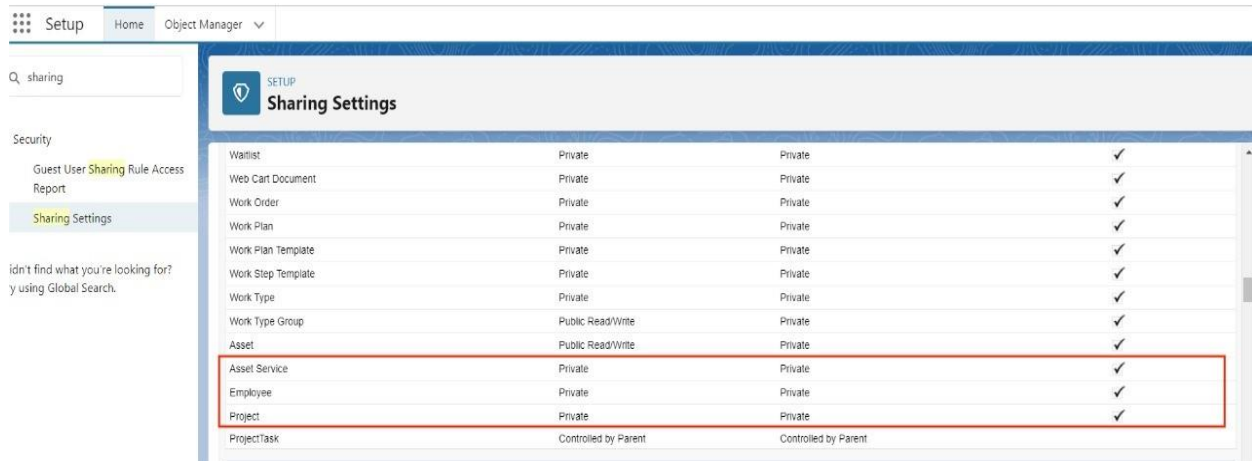
Triggers

Flow Triggers

Validation Rules

Activity: creating fields in Asset Services Object.

## Task 6: Setting OWD



Q sharing

Security

- Guest User **Sharing** Rule Access Report
- Sharing Settings**

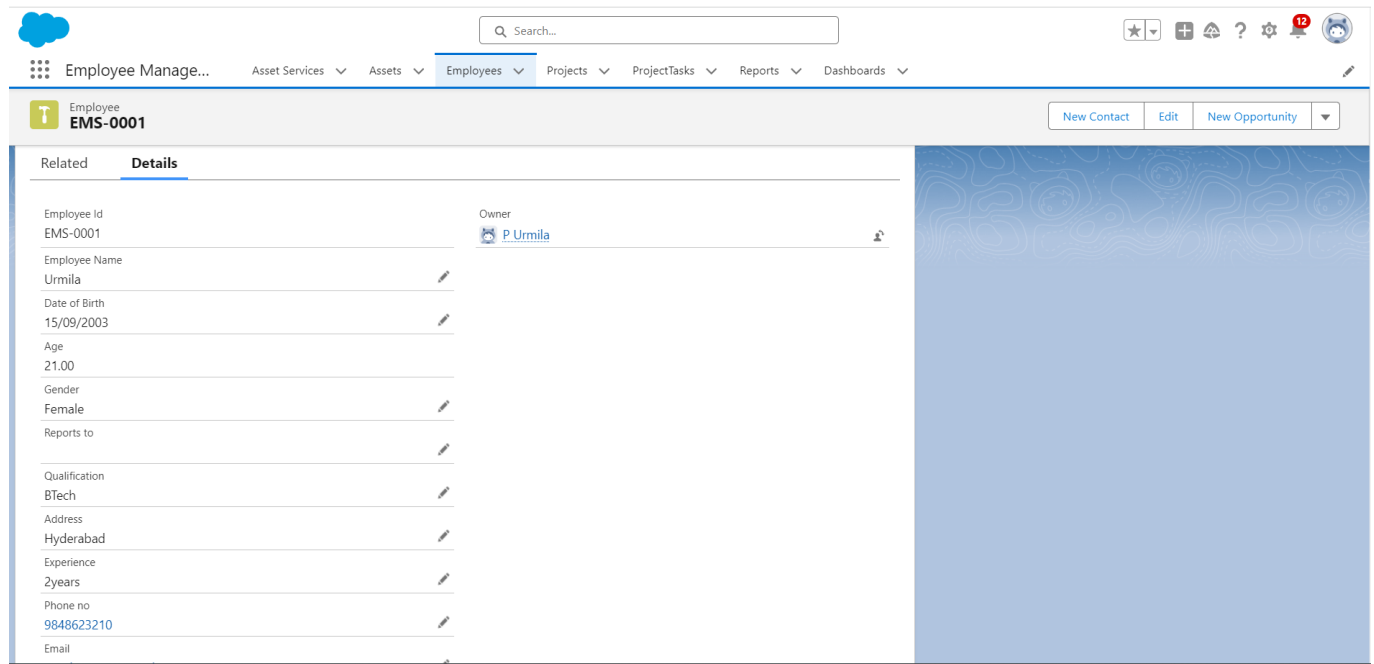
Didn't find what you're looking for? Try using Global Search.

### SETUP Sharing Settings

Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Asset	Public Read/Write	Private	✓
Asset Service	Private	Private	✓
Employee	Private	Private	✓
Project	Private	Private	✓
ProjectTask	Controlled by Parent	Controlled by Parent	

Activity: Creating OWD Setting.

## Task 7: User Adoption



Employee Manage... Asset Services Assets Employees Projects ProjectTasks Reports Dashboards

Employee EMS-0001

New Contact Edit New Opportunity

### Related Details

Employee Id	EMS-0001	Owner	P. Urmila
Employee Name	Urmila		
Date of Birth	15/09/2003		
Age	21.00		
Gender	Female		
Reports to			
Qualification	BTech		
Address	Hyderabad		
Experience	2years		
Phone no	9848623210		
Email			

Activity 2: View a Record (Employee)

Setup
Home   Object Manager ▼

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[Integrations](#)
  
[Data Import Wizard](#)

Didn't find what you're looking for?  
Try using Global Search.

SETUP

## Bulk Data Load Jobs

**Bulk Data Load Job**

**750NS0000012Ref**

View the details of a bulk data load job.

[Back to List: Bulk Data Load Jobs](#)

Bulk Data Load Job Detail				<a href="#">Refresh</a>	
Job ID	750NS0000012Ref	Job Type	Bulk V1	Status	Closed
Submitted By	Parthiv Patnak	Operation	Insert	Total Processing Time (mins)	100
Start Time	18/08/2024, 2:43 am IST	Queued Batches	0	API Active Processing Time (mins)	57
End Time	18/08/2024, 2:43 am IST	In Progress Batches	0	Apex Processing Time (mins)	0
Time to Complete (@hh:mm:ss)	00:05	Completed Batches	1		
Object	Employee	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	14		
Concurrency Mode	Parallel	Records Failed	0		
API Version	61.0	Retries	0		

[Refresh](#)

**Batches**

<a href="#">View Request</a>	<a href="#">View Result</a>	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
<a href="#">View Request</a>	<a href="#">View Result</a>	751NS000000P1P7	18/08/2024, 2:43 am	18/08/2024, 2:43 am	100	57	0	14	0	0		Completed

**Setup** Home Object Manager ▾

Q profiles

Users

**Profiles**

Didn't find what you're looking for?  
Try using Global Search.

**SETUP Profiles**

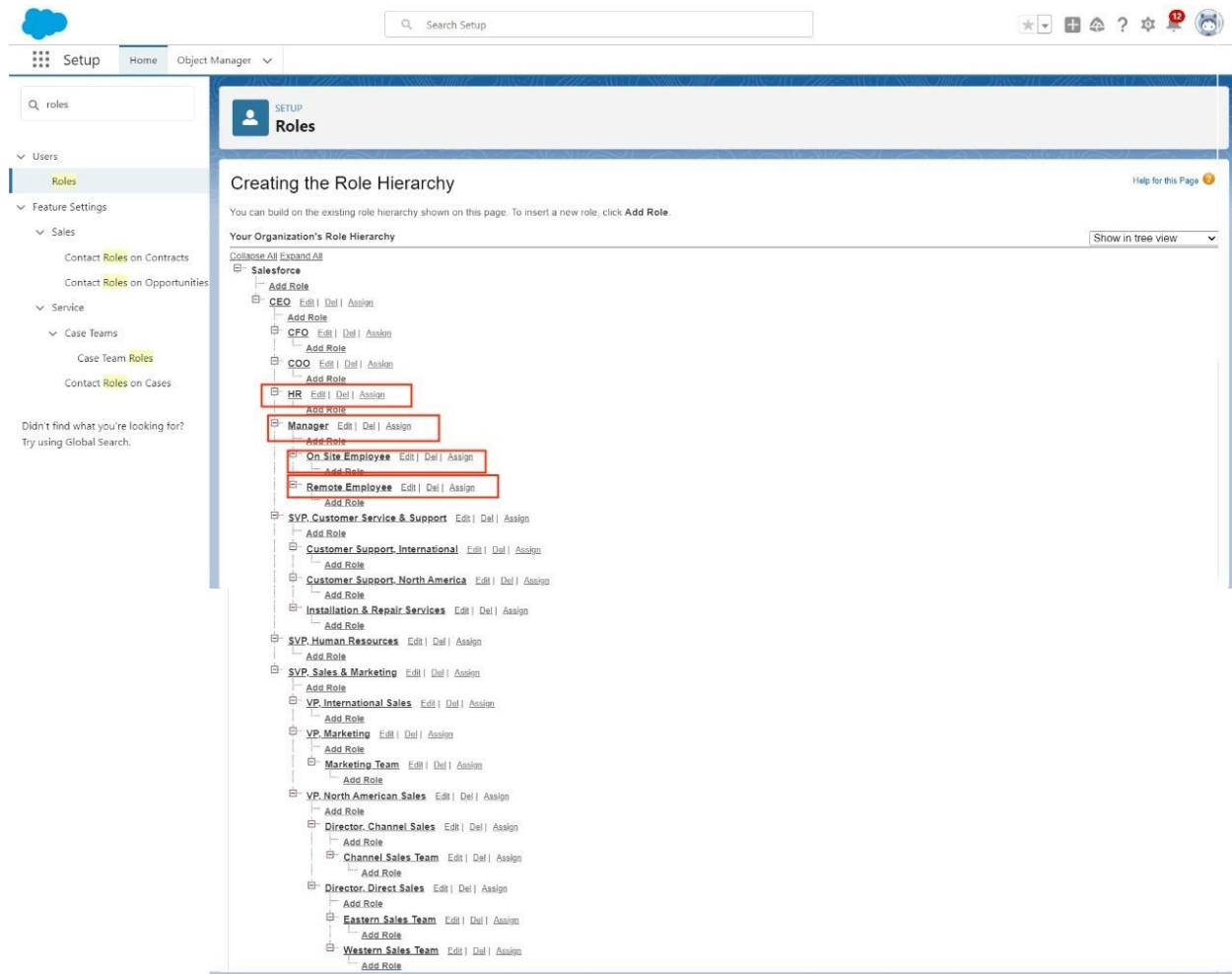
All Profiles ▾ Edit | Delete | Create New View

New Profile (+)

Action	Profile Name	User License +	Custom
Edit   Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
Edit   Clone	Work.com Only User	Work.com Only	<input type="checkbox"/>
Edit   Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit   Del   ...	On Site Employee	Salesforce Platform	<input checked="" type="checkbox"/>
Edit   Del   ...	Manager	Salesforce Platform	<input checked="" type="checkbox"/>
Edit   Del   ...	Remote Employee	Salesforce Platform	<input checked="" type="checkbox"/>
Edit   Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit   Clone	Minimum Access - API Only Integrations	Salesforce Integration	<input type="checkbox"/>
Edit   Del   ...	Salesforce API Conn System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
Edit   Del   ...	HS	Salesforce	<input checked="" type="checkbox"/>
Edit   Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit   Clone	Contract Manager	Salesforce	<input type="checkbox"/>
Edit   Clone	Marketing User	Salesforce	<input type="checkbox"/>
Edit   Del   ...	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
Edit   Del   ...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>

Creating profiles: HR, Manager, On-site employee, Remote employee

## Task 10: Roles



Activity: Assigning Roles: HR, Manager, On-site employee, Remote employee

# Task 11: User

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with categories like Users, User Management Settings, Feature Settings, and User Interface. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. Below the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatter_00dd00000dg5clua1.geucktydubxz@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>   Edit	Mikaelson_Kol	kmika	kol_mik@gmail.com	Manager	✓	Manager
<input type="checkbox"/>   Edit	Mikaelson_Niklaus	nmika	niarkinmik12@gmail.com	HR	✓	HR
<input type="checkbox"/>   Edit	Salvatore_Damon	dsalv	damon_s@gmail.com	Remote Employee	✓	Remote Employee
<input type="checkbox"/>   Edit	Salvatore_Stephen	ssalv	stephen_s@gmail.com	On Site Employee	✓	On Site Employee
<input type="checkbox"/>   Edit	Urmila_P	PUrmi	urmila@o.com		✓	System Administrator
<input type="checkbox"/>   Edit	User_Integration	integ	integration@00dd00000dg5clua1.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User_Security	sec	insightssecurity@00dd00000dg5clua1.com		✓	Analytics Cloud Security User

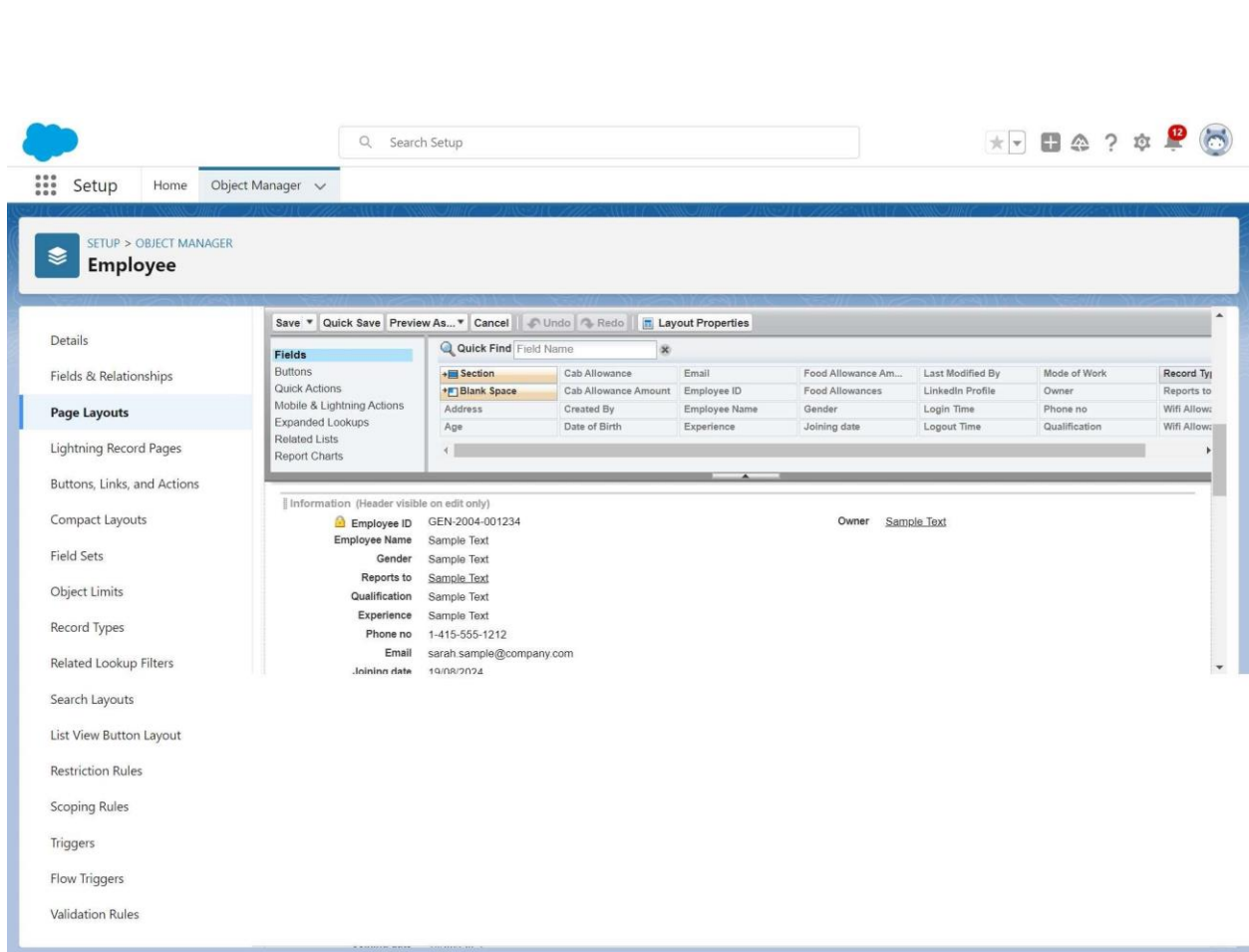
## Activity: Creating Users

# Task 12: Page Layouts

The screenshot shows the Salesforce Setup interface for the 'Employee' object. The left sidebar contains a navigation menu with categories like Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Employee' and includes a 'Quick Find' search bar, a 'Fields' list on the left, and a table of fields. The table has columns for Field Name, Email, Food Allowance Amount, Last Modified By, Mode of Work, and Record Type. Below the table are buttons for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'.

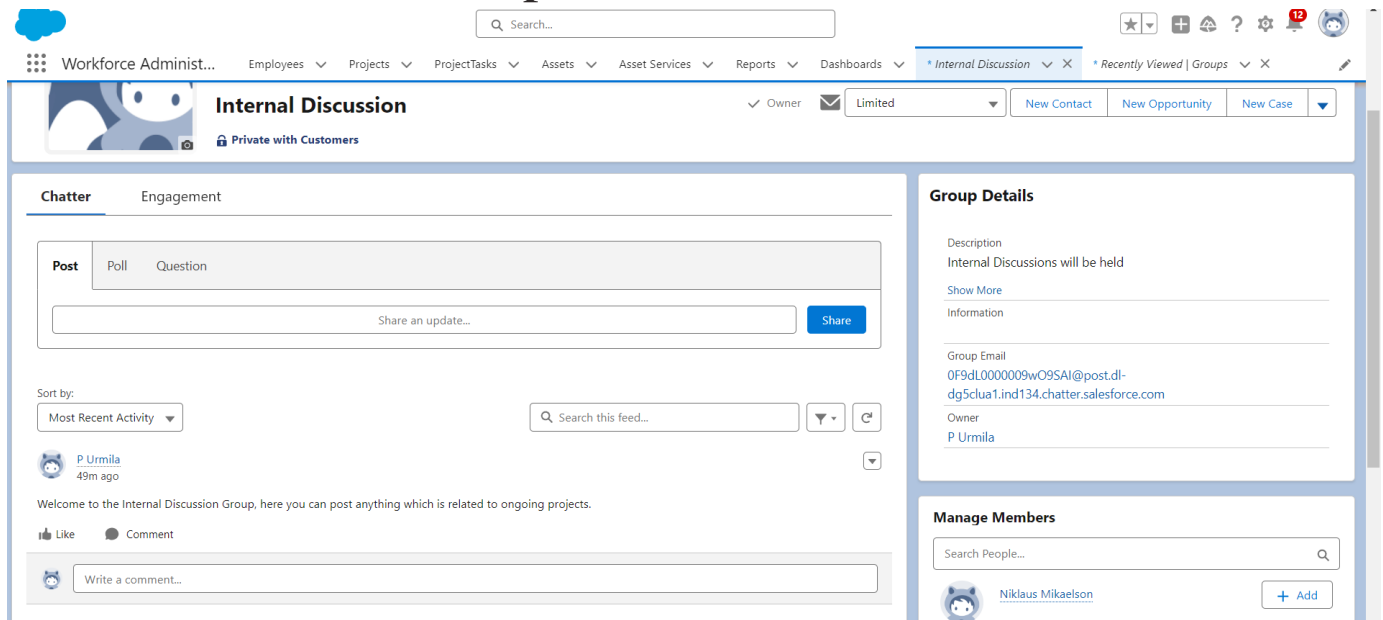
Field Name	Email	Food Allowance Amount	Last Modified By	Mode of Work	Record Type
Cab Allowance					
Cab Allowance Amount	Employee ID	Food Allowances	LinkedIn Profile	Owner	Reports to
Address	Created By	Employee Name	Gender	Login Time	Phone no
Age	Date of Birth	Experience	Joining date	Logout Time	Qualification
					WIFI Allow

## Activity: creating a page layout for Employee object - On Site Employee



Activity: creating a page layout for Employee object - Remote Employee

## Task 13: Chatter Group



Activity: Creating a chatter group for your organization

# Task 14: Record Types

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar, and various utility icons. The left sidebar shows the Setup menu with 'Object Manager' selected. The main content area is titled 'Employee' and 'On Site Employee'. It includes a description of the record type and an 'Edit' button. Below this is a table of properties: Record Type Label (On Site Employee), Record Type Name (On\_Site\_Employee), Namespace Prefix, Description, Created By (P.Urmila, 04/10/2024, 3:54 pm), and Modified By (P.Urmila, 04/10/2024, 4:00 pm). At the bottom, there is a 'Picklists Available for Editing' table.

Action	Field	Modified Date
<a href="#">Edit</a>	Gender	04/10/2024, 3:54 pm
<a href="#">Edit</a>	Mode of Work	04/10/2024, 3:54 pm

## Activity: Creating On Site Employee Record Type

The screenshot shows the Salesforce Setup interface for the 'Remote Employee' record type. The layout is similar to the previous one, but the record type name is 'Remote Employee'. The 'Picklists Available for Editing' table is also present.

Action	Field	Modified Date
<a href="#">Edit</a>	Gender	04/10/2024, 4:02 pm
<a href="#">Edit</a>	Mode of Work	04/10/2024, 4:02 pm

# Activity: Creating Remote Employee Record Type

## Task 15: Permission Sets

The screenshot shows the Salesforce Setup interface for the 'Per to Emp' Permission Set. The left sidebar contains navigation links for 'Setup', 'Home', 'Object Manager', 'Users', and 'Permission Sets'. The main content area is titled 'Permission Sets' and includes a search bar, 'Clone', 'Edit Properties', 'Manage Assignments', and 'View Summary' buttons. Below these are sections for 'Tab Settings', 'Employee: Record Type Assignments', 'Object Permissions', and 'Field Permissions'.

**Tab Settings**

Available	Visible
<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Employee: Record Type Assignments**

Record Types	Assigned Record Types
On Site Employee	<input checked="" type="checkbox"/>
Remote Employee	<input type="checkbox"/>

**Object Permissions**

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

**Field Permissions**

Field Name	Field API Name	Read Access	Edit Access
Address	Address__c	<input type="checkbox"/>	<input type="checkbox"/>
Age	Age__c	<input type="checkbox"/>	<input type="checkbox"/>
Cab Allowance	Cab_Allowance__c	<input type="checkbox"/>	<input type="checkbox"/>
Cab Allowance Amount	Cab_Allowance_Amount__c	<input type="checkbox"/>	<input type="checkbox"/>
Created By	CreatedById	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Date of Birth	Date_of_Birth__c	<input type="checkbox"/>	<input type="checkbox"/>
Email	Email__c	<input type="checkbox"/>	<input type="checkbox"/>
Employee ID	Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee Name	Employee_Name__c	<input type="checkbox"/>	<input type="checkbox"/>
Experience	Experience__c	<input type="checkbox"/>	<input type="checkbox"/>
Food Allowance Amount	Food_Allowance_Amount__c	<input type="checkbox"/>	<input type="checkbox"/>
Food Allowances	Food_Allowances__c	<input type="checkbox"/>	<input type="checkbox"/>
Gender	Gender__c	<input type="checkbox"/>	<input type="checkbox"/>
Joining date	Joining_date__c	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	LastModifiedById	<input checked="" type="checkbox"/>	<input type="checkbox"/>
LinkedIn Profile	LinkedIn_Profile__c	<input type="checkbox"/>	<input type="checkbox"/>
Login Time	Login_Time__c	<input type="checkbox"/>	<input type="checkbox"/>
Logout Time	Logout_Time__c	<input type="checkbox"/>	<input type="checkbox"/>
Mode of Work	Mode_of_Work__c	<input type="checkbox"/>	<input type="checkbox"/>
Owner	OwnerId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Phone no	Phone_no__c	<input type="checkbox"/>	<input type="checkbox"/>
Qualification	Qualification__c	<input type="checkbox"/>	<input type="checkbox"/>
Record Type	RecordTypeId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reports to	Employee__c	<input type="checkbox"/>	<input type="checkbox"/>
Wifi Allowance Amount	Wifi_Allowance_Amount__c	<input type="checkbox"/>	<input type="checkbox"/>
Wifi Allowances	Wifi_Allowances__c	<input type="checkbox"/>	<input type="checkbox"/>

Activity: Creating a permission set for employee object



# Task 16: Reports

Workforce Administ... Employees Projects ProjectTasks Assets Asset Services Reports Dashboards Internal Discussion Recently Viewed | Groups

Report: Employees  
**New Employees Report**

Enable Field Editing

Total Records  
15

	Employee Name	Employee: Employee Id	Reports to	Login Time	Logout Time	Mode of Work	LinkedIn Profile
1	Urmila	EMS-0001	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/urmila-pedhakavali-042b30270/">https://www.linkedin.com/in/urmila-pedhakavali-042b30270/</a>
2	Jackie Chan	EMS-0006	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/jackie">https://www.linkedin.com/in/jackie</a>
3	James	EMS-0007	-	-	-	Remote	<a href="https://www.linkedin.com/in/james">https://www.linkedin.com/in/james</a>
4	Benjamin	EMS-0008	-	-	-	Remote	<a href="https://www.linkedin.com/in/benjamin">https://www.linkedin.com/in/benjamin</a>
5	Alexander	EMS-0009	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/alex">https://www.linkedin.com/in/alex</a>
6	William	EMS-0010	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/william">https://www.linkedin.com/in/william</a>
7	Ethan	EMS-0011	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/ethan">https://www.linkedin.com/in/ethan</a>
8	Emma	EMS-0012	-	-	-	Remote	<a href="https://www.linkedin.com/in/emma">https://www.linkedin.com/in/emma</a>
9	Olivia	EMS-0013	-	-	-	Remote	<a href="https://www.linkedin.com/in/olivia">https://www.linkedin.com/in/olivia</a>
10	Sophia	EMS-0014	-	-	-	Remote	<a href="https://www.linkedin.com/in/sophia">https://www.linkedin.com/in/sophia</a>
11	Isabella	EMS-0015	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/isabella">https://www.linkedin.com/in/isabella</a>
12	Amelia	EMS-0016	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/amelia">https://www.linkedin.com/in/amelia</a>
13	Elizabeth	EMS-0017	-	-	-	Remote	<a href="https://www.linkedin.com/in/elizabeth">https://www.linkedin.com/in/elizabeth</a>
14	Scarlett	EMS-0018	-	-	-	Remote	<a href="https://www.linkedin.com/in/scarlett">https://www.linkedin.com/in/scarlett</a>
15	Chloe	EMS-0019	-	9:00 am	5:00 pm	On Site	<a href="https://www.linkedin.com/in/chole">https://www.linkedin.com/in/chole</a>

## Activity: Create Report - New Employees Report

## Activity: Create Report - Employees with ProjectTasks and Projects

Report: Assets with Employee Name  
**New Assets with Employee Name Report**

Enable Field Editing

Total Records  
0


No Results

No records returned. Try editing report filters.

- Show All assets.
- Edit other filters in the filter panel.

## Activity: Create Report - New Assets with Employee Name Report

# Task 17: Dashboards

 Dashboard

**Dashboard 1**

As of 19-Aug-2024, 12:46 am-Viewing as Parthiv Patnaik

Refresh

Edit

Subscribe


▼

Employees with ProjectTasks and Projects

We can't draw this chart because there is no data.

View Report (Employees with ProjectTasks and Projects)

## Activity 1: Create Dashboard -1

 Workforce Administ...

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Employees ▼

Projects ▼

ProjectTasks ▼

Assets ▼

Asset Services ▼


Reports ▼

**Dashboards ▼**

\* Internal Discussion ▼

✕

✎

 Dashboard

**Dashboard 2**

As of 19-Aug-2024, 12:46 am-Viewing as Parthiv Patnaik

Refresh

Edit

Subscribe

▼

New Employees Report

Employee Name ↑	Employee: Employee ID	Reports to	Login Time	Logout Time
Alexander	EMS-0019	-	9:00 am	5:00 pm
Alexander	EMS-0005	-	9:00 am	5:00 pm
Amelia	EMS-0026	-	9:00 am	5:00 pm
Amelia	EMS-0012	-	9:00 am	5:00 pm
Benjamin	EMS-0018	-	-	-
Benjamin	EMS-0004	-	-	-
Chloe	EMS-0029	-	9:00 am	5:00 pm
Chloe	EMS-0015	-	9:00 am	5:00 pm
Elizabeth	EMS-0027	-	-	-
Elizabeth	EMS-0013	-	-	-
Emma	EMS-0022	-	-	-
Emma	EMS-0008	-	-	-
Ethan	EMS-0021	-	9:00 am	5:00 pm
Ethan	EMS-0007	-	9:00 am	5:00 pm
Isabella	EMS-0025	-	9:00 am	5:00 pm
Isabella	EMS-0011	-	9:00 am	5:00 pm
Jackie Chan	EMS-0016	-	9:00 am	5:00 pm

View Report (New Employees Report)

## Activity 1: Create Dashboard -2

**Thank You**