WORKFORCE ADMINISTRATION SOLUTION

By

VIJAY VISHAL

Email – <u>vijayvishal0403@gmail.com</u> SKILL WALLET ID - SWUID20240013674

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.

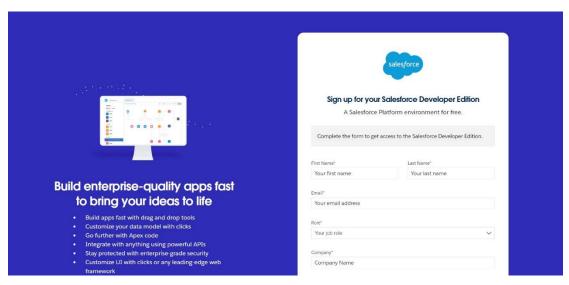
INDEX Page

Topics	Page no
Salesforce	 01
Object	 02
Tabs	 03
The Lightning App	 04
Fields & Relationships	 05
Setting OWD	 08
User Adoption	 09
Import Data	 10
Profiles	 11
Role	 12
Users	 13
Page layouts	 14
Chatter Group	 15
Record Types	 16
Permission sets	 17
Reports	 18
Dashboards	 20

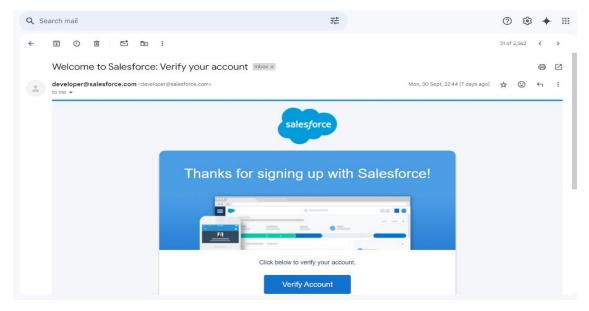
INTRODUCTION

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

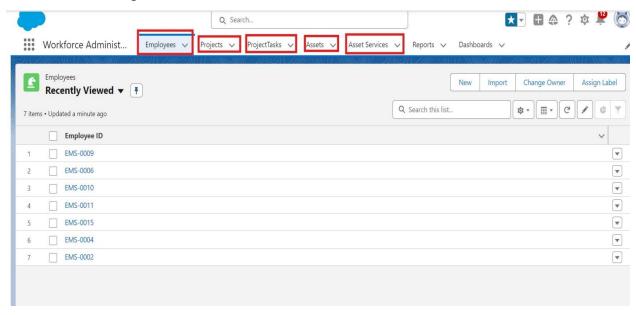


Activity 1: Creating Developer Account



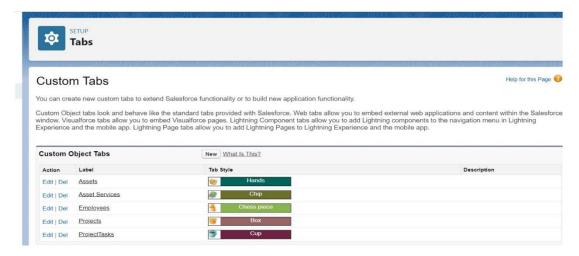
Activity 2: Account Activation

Task 2: Object



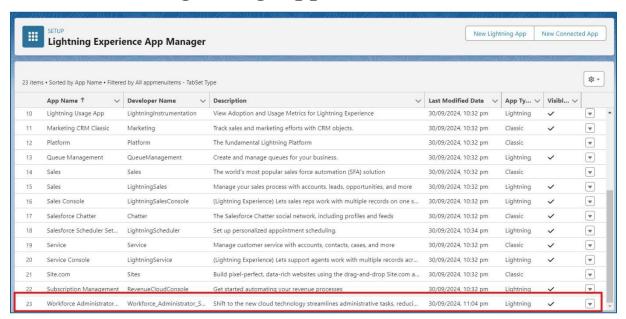
Activity - Create 5 objects with label names as Employees, Projects, ProjectTasks, Assets, Asset Services.

Task 3: Tabs



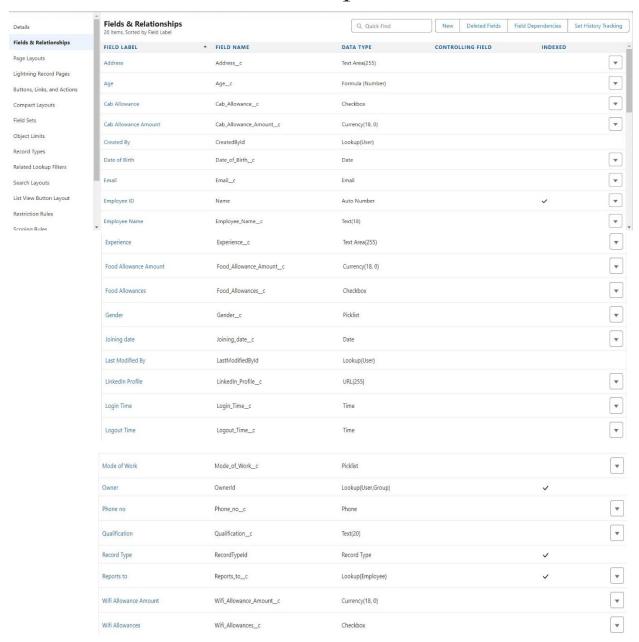
Activity: Creating 5 Custom Tabs - Employees, Projects, ProjectTasks, Assets, Asset Services.

Task 4: The Lightning App

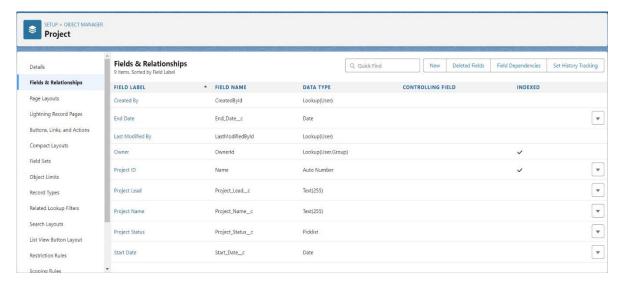


Activity: Create a Lightning App - Workforce Administration Solution.

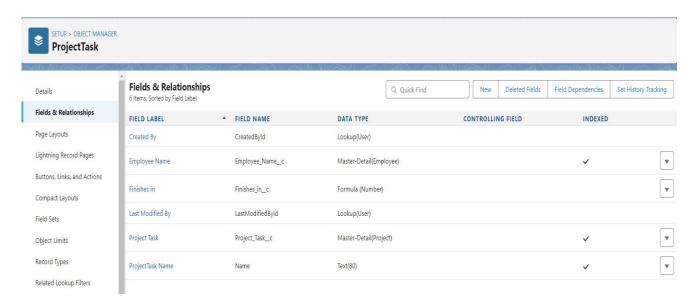
Task 5: Fields & Relationships



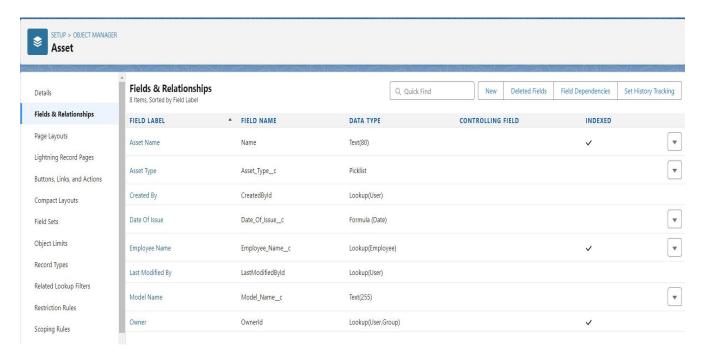
Activity: Creating fields in Employees object



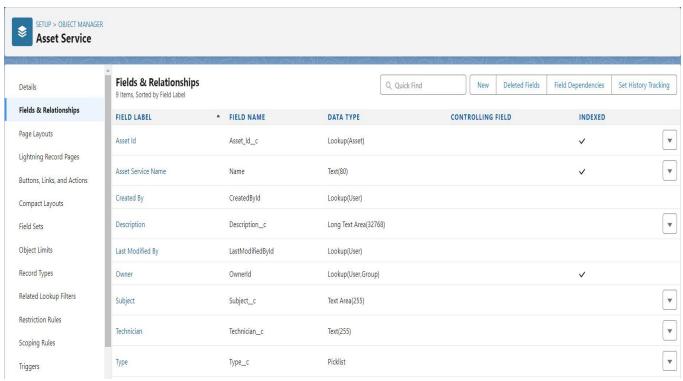
Activity: creating fields in projects object



Activity: creating fields in ProjectTasks object.



Activity: creating fields in Assets object.



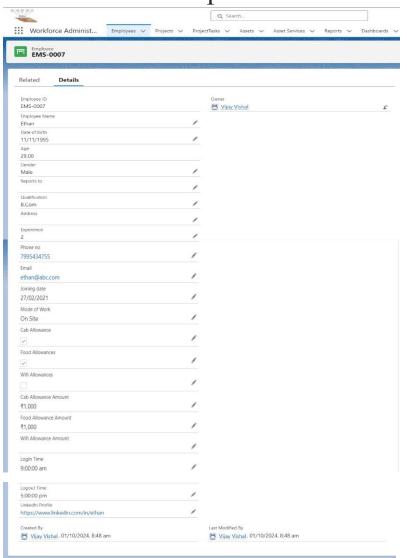
Activity: creating fields in Asset Services Object.

Task 6: Setting OWD



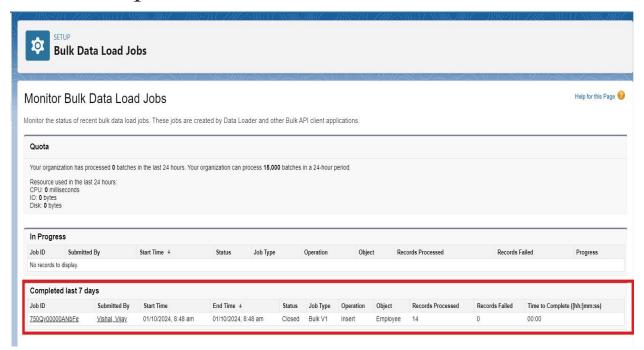
Activity: Creating OWD Setting.

Task 7: User Adoption

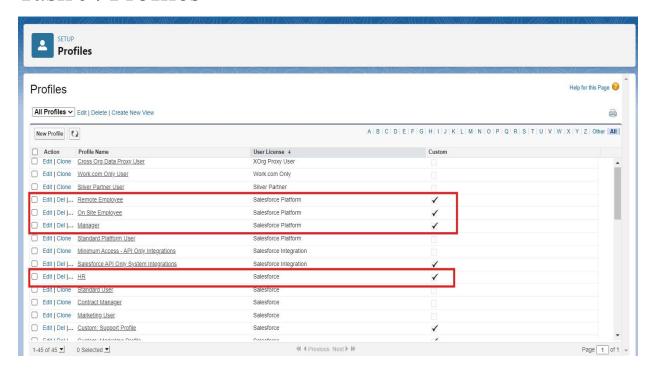


Activity 2: View a Record (Employee)

Task 8: Import Data

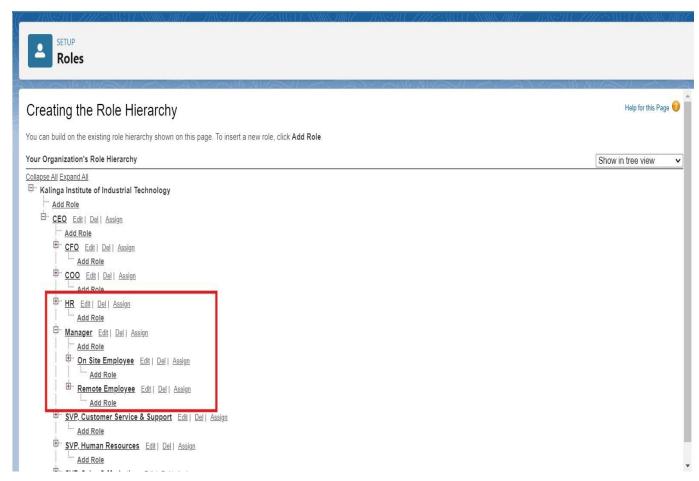


Task 9: Profiles



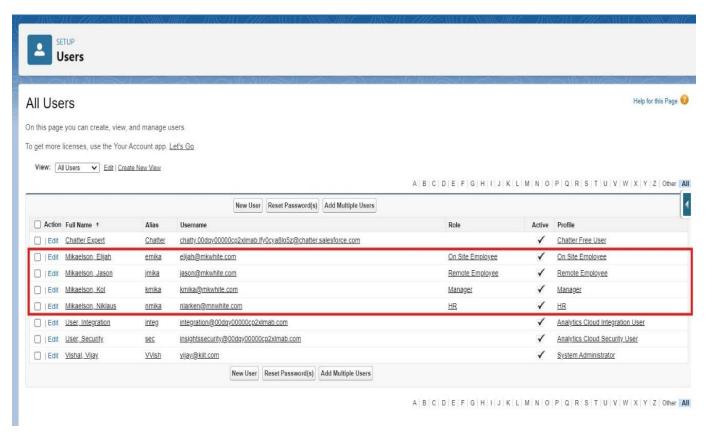
Creating profiles: HR, Manager, On-site employee, Remote employee

Task 10: Roles



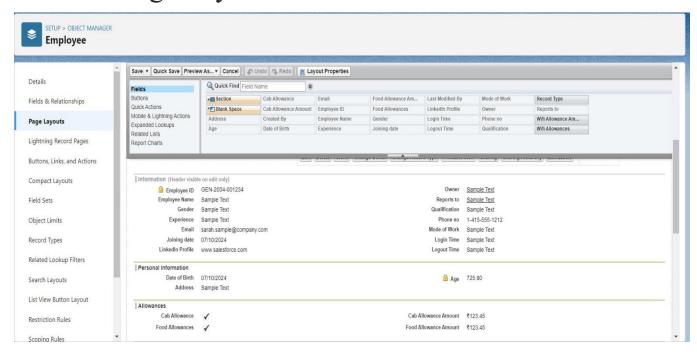
Activity: Assigning Roles: HR, Manager, On-site employee, Remote employee

Task 11: User

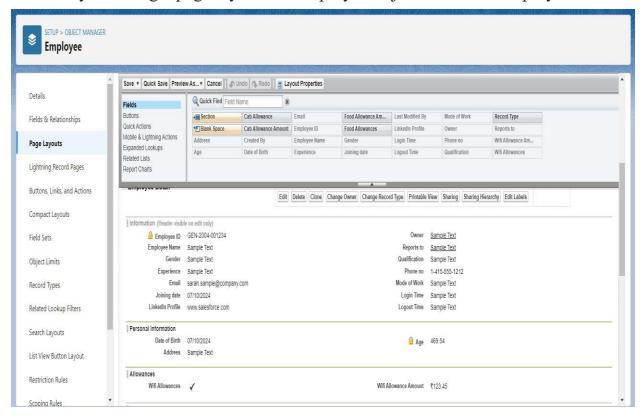


Activity: Creating Users: (Highlighted above)

Task 12: Page Layouts

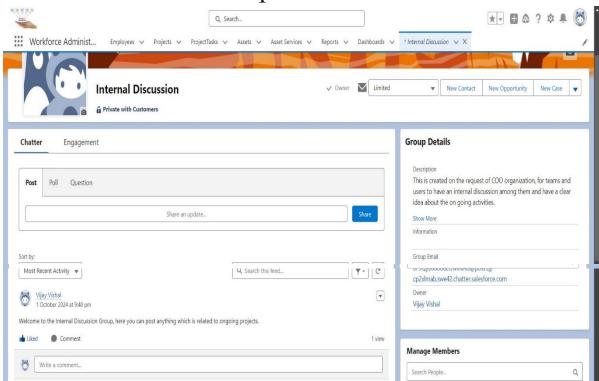


Activity: creating a page layout for Employee object - On Site Employee



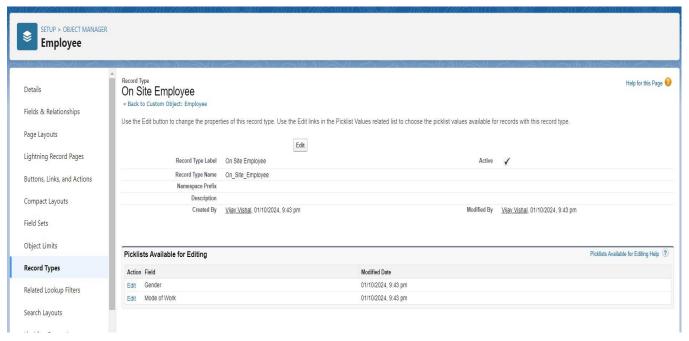
Activity: creating a page layout for Employee object - Remote Employee

Task 13: Chatter Group

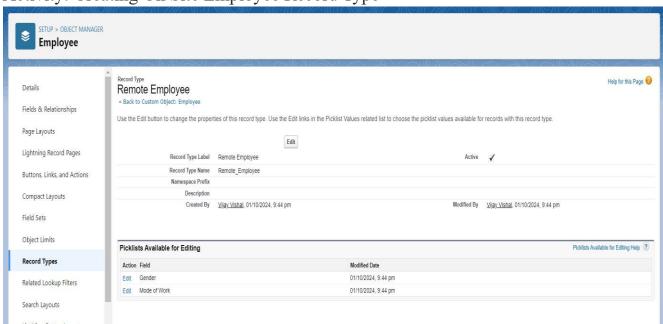


Activity: Creating a chatter group for your organization

Task 14: Record Types



Activity: Creating On Site Employee Record Type



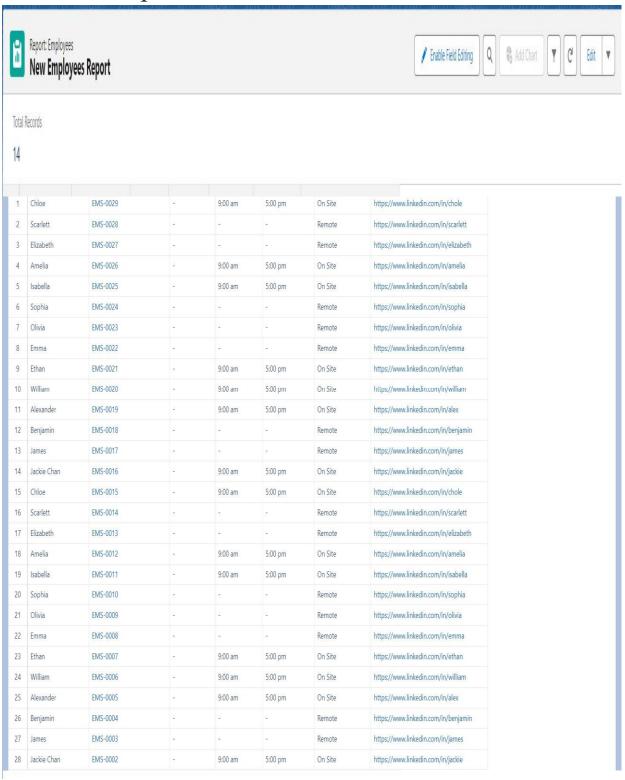
Activity: Creating On Site Employee Record Type

Task 15: Permission Sets

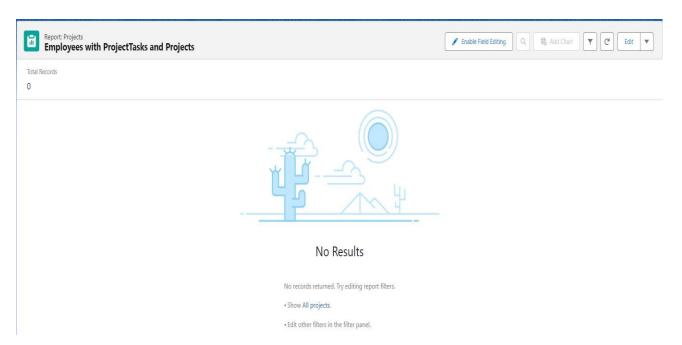
Employees		E	dit
ab Settings			
Available	Visi	ible	
₩			
mployee: Record Type Assignn	nents		
Record Types		Assigned Record Type	5
On Site Employee			
Remote Employee			
bject Permissions			
Permission Name		Enabled	
Read Read		Enabled	
Create		E	
Edit			
Delete			
View All			
Modify All			
Field Name Address	Field API Name Addressc	Read Access	Edit Access
Address	Addressc		
Age	Agec		
Cab Allowance	Cab_Allowancec		
Cab Allowance Amount	Cab_Allowance_Amountc		
Created By	CreatedByld	100	
Date of Birth	Date_of_Birthc		
Email	Emailc		
Employee ID	Name	E3	
Employee Name	Employee_Namec		
Experience	Experiencec		
Food Allowance Amount	Food_Allowance_Amountc		
Food Allowances	Food_Allowancesc		
Gender	Genderc		
Joining date	Joining_datec		
Last Modified By	LastModifiedByld	100	
LinkedIn Profile	LinkedIn_Profilec		
Login Time	Login_Timec		
Logout Time	Logout_Timec		
Mode of Work	Mode_of_Workc		
Owner	Ownerld	E3	W
Phone no	Phone_noc		
Qualification	Qualificationc		
Record Type	RecordTypeId	ES	W
Reports to	Reports_toc		

Activity: Creating a permission set for employee object

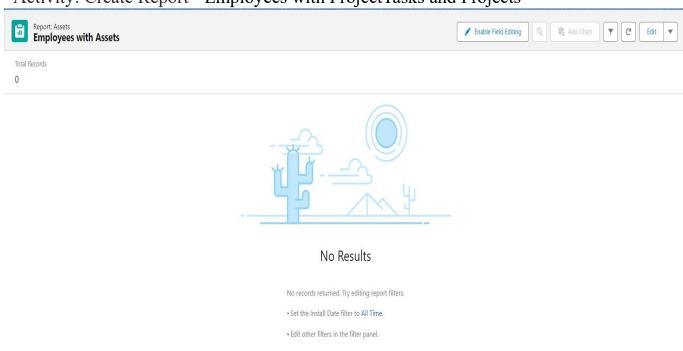
Task 16: Reports



Activity: Create Report - New Employees Report



Activity: Create Report - Employees with ProjectTasks and Projects

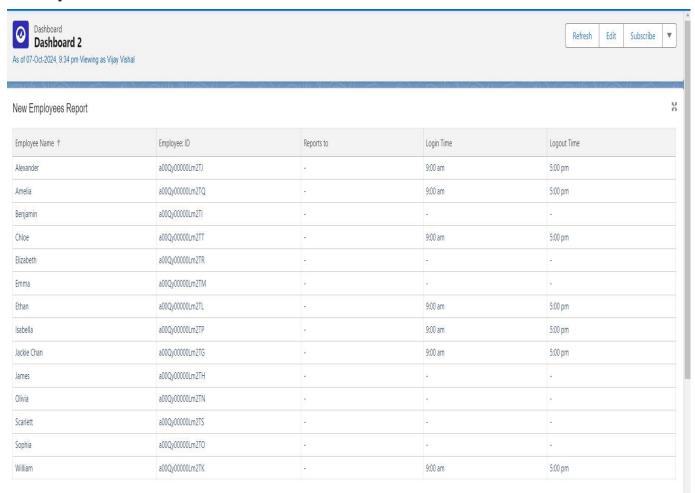


Activity: Create Report - New Assets with Employee Name Report

Task 17: Dashboards



Activity 1: Create Dashboard -1



Activity 1: Create Dashboard -2

Thank You