

'Emplify' App User Manual

V1.2

Tugboat

2014

'Emplify' App User Manual v1.2

CREATE EMPLIFY APPLICATION SPECIFIC PROFILE TO ASSOCIATE TO USERS

(Go to Setup → Manage Users → Profiles and use below set up details for Page Layouts, Tab Setting etc.)

NOTE: Please ensure to add Emplify specific Account layout → "WF Account Layout"

The screenshot displays the Emplify application interface. The top navigation bar includes a search bar, the user name 'D Sharma', a 'Setup' button (highlighted with a red circle), 'Help & Training', and an 'Emplify' dropdown menu. The main navigation bar lists various modules: Home, Accounts, Skills, Resources, Projects, Positions, Fulfillment, Reports, and Dashboards. The left sidebar contains a 'Deploy' section with links to Schema Builder, Canvas App Previewer, Installed Packages, AppExchange Marketplace, and Critical Updates. Below this is the 'Administration Setup' section, which includes 'Manage Users' (highlighted with a red circle) and 'Profiles' (also highlighted with a red circle). Other links in the sidebar include Public Groups, Queues, Login History, Manage Apps, Company Profile, Security Controls, Domain Management, Communication Templates, Translation Workbench, Data Management, Monitoring, Mobile Administration, Desktop Administration, Email Administration, and Google Apps. The main content area is divided into three sections: 'Page Layouts', 'Custom App Settings', and 'Tab Settings'. The 'Page Layouts' section shows 'Standard Object Layouts' and 'Custom Object Layouts' for various objects like Account, Position, Project, Project Resource, Rating, and Resource. The 'Custom App Settings' section shows settings for 'Emplify' and 'Platform'. The 'Tab Settings' section shows 'Standard Tab Settings' and 'Custom Tab Settings' for various tabs like Home, Accounts, App Launcher, Console, Contacts, Content, Contracts, Dashboards, Data.com, Documents, Forecasts, Ideas, Idea Themes, Libraries, Orders, Price Books, Products, Reports, Site.com, Subscriptions, Open Positions, Positions, Projects, Resources, and Skills.

Page Layouts

Standard Object Layouts

Object	Layout	[View Assignment]
Account	WF Account Layout	[View Assignment]

Custom Object Layouts

Object	Layout	[View Assignment]
Position	Resource Request Layout	[View Assignment]
Project	Project Layout	[View Assignment]
Project Resource	Project Resource Layout	[View Assignment]
Rating	Rating Layout	[View Assignment]
Resource	Resource Layout	[View Assignment]

Custom App Settings

Visible	Default
Emplify	☒
Platform	☐

Tab Settings

Standard Tab Settings

Tab	Setting
Home	Default On
Accounts	Default On
App Launcher	Default Off
Console	Tab Hidden
Contacts	Default On
Content	Tab Hidden
Contracts	Tab Hidden
Dashboards	Default On
Data.com	Tab Hidden
Documents	Default Off
Forecasts	Default Off
Ideas	Default Off
Idea Themes	Tab Hidden
Libraries	Tab Hidden
Orders	Tab Hidden
Price Books	Tab Hidden
Products	Tab Hidden
Reports	Default On
Site.com	Default Off
Subscriptions	Tab Hidden

Custom Tab Settings

Tab	Setting
Open Positions	Default On
Positions	Default On
Projects	Default On
Resources	Default On
Skills	Default On

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PROFILE SETTING CONTINUED...

Deploy

Schema Builder
Canvas App Previewer
Installed Packages
AppExchange Marketplace
Critical Updates

Administration Setup

Manage Users

Users
Mass Email Users
Roles
Permission Sets

Profiles

Public Groups
Queues
Login History

Manage Apps

Company Profile
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Monitoring
Mobile Administration
Desktop Administration
Email Administration
Google Apps

Standard Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	☒	☒	☒	☒	☒	☒
Contacts	☒	☒	☒	☒	☒	☒
Documents	☒	☒	☒	☒	☐	☐

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Ideas	☒	☒	☐	☐	☐	☐
Push Topics	☐	☐	☐	☐	☐	☐

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Positions	☒	☒	☒	☒	☒	☒
Projects	☒	☒	☒	☒	☒	☒
Project Resources	☒	☒	☒	☒	☒	☒
Ratings	☒	☒	☒	☒	☒	☒
Resources	☒	☒	☒	☒	☒	☒

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Resource Request Skill Entries	☒	☒	☒	☒	☒	☒
Resource Skill Entries	☒	☒	☒	☒	☒	☒
Skills	☒	☒	☒	☒	☒	☒
Sub-Skills	☒	☒	☒	☒	☒	☒

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CREATE RESOURCE MANAGER & PROJECT MANAGER USERS FOR EACH INTERNAL BUSINESS UNITS (EXAMPLE CRM) & ASSOCIATE EMPLIFY SPECIFIC PROFILE TO THOSE USERS

(Click Setup → Manage Users → Users → New User as shown below)

The screenshot displays the Emplify application interface. At the top, the 'Setup' button is circled in red. The left sidebar shows the 'Administer' section with 'Manage Users' and 'Users' circled in red. The main content area is titled 'Active Users' and shows a table of active users. Above the table, the 'New User' button is circled in red.

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
☐ Edit	Project Manager, CRM	cproi	primgr@tuqboat.in	10/6/2014 4:07 PM		✓	WF_test	
☐ Edit	Resource Manager, CRM	creso	resmgr@tuqboat.in			✓	WF Resource Manager1	
☐ Edit	Sharma, D	DShar	deepak.sharma@98demo.com	27/6/2014 4:18 PM		✓	System Administrator	

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CREATE ACCOUNT OF TYPE BUSINESS UNIT (INTERNAL) & CUSTOMER (EXTERNAL) AS REQUIRED

(Click Account → New as shown below)

The screenshot shows the 'New Account' form in the Emplify application. The 'Accounts' menu item in the top navigation bar is circled in red. The 'Account Type' dropdown menu is also circled in red, showing the following options: Business Unit, --None--, Business Unit, Customer, Practice, and Other. The form is divided into three main sections: Account Information, Address Information, and Description Information. The Account Information section includes fields for Account Name, Emplify (checkbox), Account Type, Vertical, Parent Account, Phone, Website, Annual Revenue, Resource Manager, and Account Owner. The Address Information section includes fields for Billing Street, Billing City, Billing State/Province, Billing Zip/Postal Code, and Billing Country. The Description Information section includes a Description field. The form also features a 'Save' button, a 'Save & New' button, and a 'Cancel' button. A 'Help for this Page' link is available in the top right corner. A 'Chat' button is located in the bottom right corner.

Account Edit [Save] [Save & New] [Cancel]

Account Information ! = Required Information

Account Name

Emplify ☐

Account Type

Vertical

Parent Account

Phone

Website

Annual Revenue

Resource Manager

Account Owner D Sharma

Address Information

Billing Street

Billing City

Billing State/Province

Billing Zip/Postal Code

Billing Country

Description Information

Description

Chat

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ASSOCIATE RESOURCE MANAGER TO THE BUSINESS UNIT

(Associate as shown below)

The screenshot displays the Emplify app interface. At the top, there's a navigation bar with the Emplify logo, a search bar, and user options (D Sharma, Setup, Help & Training, and an Emplify dropdown). Below this is a secondary navigation bar with tabs: Home, Accounts (selected), Skills, Resources, Projects, Positions, Fulfillment, Reports, and Dashboards. The main content area is titled 'Account Customer Relationship Management (CRM)' with a 'Show Feed' button and a 'Back to List: Users' link. It includes a breadcrumb trail: 'Contacts (0)' | 'Projects (0)' | 'Projects (Business Unit) (2)'. The 'Account Detail' section has 'Edit', 'Delete', and 'Sharing' buttons. The account information is as follows:

Field	Value
Account Name	Customer Relationship Management (CRM) View Hierarchy
Parent Account	
Emplify	✓
Account Type	Business Unit
Website	
Vertical	Vertical
Annual Revenue	
Resource Manager	CRM Resource Manager
Account Owner	D Sharma Change
Created By	D Sharma, 2/5/2014 4:10 PM
Billing Address	
Description	

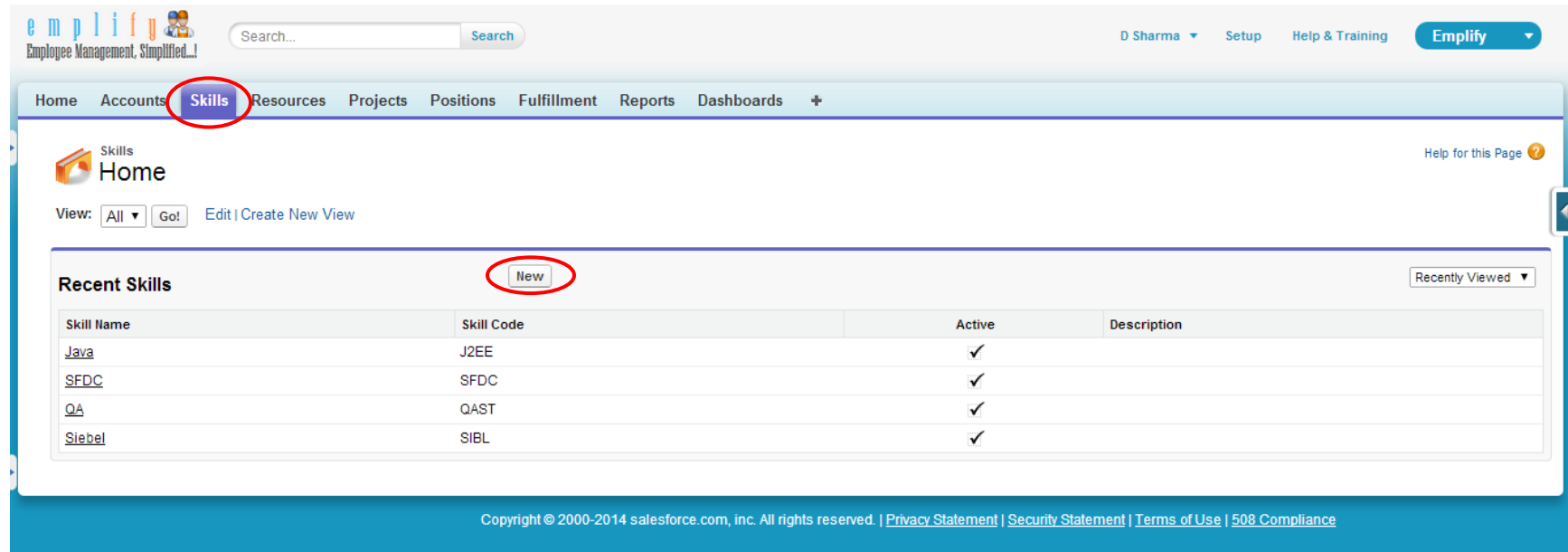
At the bottom of the account detail section, there are 'Edit', 'Delete', and 'Sharing' buttons.

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CREATE NEW SKILLS FOR YOUR ORGANIZATION

(Click Skills → New as shown below, to create as many skills your organization has/requires)

NOTE: Alternatively we can provide Data Load Templates and Data Load Scripts to load Resource & Skill / Sub-skill records and associate each other. Please reach out to us @ info@tugboat.in



The screenshot shows the Emplify app interface. The top navigation bar includes 'Home', 'Accounts', 'Skills' (highlighted), 'Resources', 'Projects', 'Positions', 'Fulfillment', 'Reports', and 'Dashboards'. The 'Skills' section is active, showing a 'Home' view with a 'View: All' dropdown and a 'Go!' button. Below this is a 'Recent Skills' section with a 'New' button circled in red. A table lists the following skills:

Skill Name	Skill Code	Active	Description
Java	J2EE	✓	
SFDC	SFDC	✓	
QA	QAST	✓	
Siebel	SIBL	✓	

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CREATE NEW SUB-SKILLS

(Drilldown on each Skill created and click New Sub-Skill as shown below, to create all of sub-skills)

NOTE: Alternatively we can provide Data Load Templates and Data Load Scripts to load Resource & Skill / Sub-skill records and associate each other. Please reach out to us @ info@tugboat.in

The screenshot displays the Emplify application interface. At the top, there is a search bar and navigation links for Home, Accounts, Skills, Resources, Projects, Positions, Fulfillment, Reports, and Dashboards. The 'Skills' tab is currently selected. Below the navigation bar, the 'Skill Detail' section for 'SFDC' is visible, showing fields for Skill Name, Skill Code, and Active status. The 'Sub-Skills' section below it contains a table with columns for Action, Sub Skill Name, and Description. A 'New Sub-Skill' button is highlighted with a red circle. The footer of the application shows copyright information and links to Privacy Statement, Security Statement, Terms of Use, and 508 Compliance.

Action	Sub Skill Name	Description
Edit Del	ADM 201 Certification	
Edit Del	Apex	
Edit Del	DEV 401 Certification	
Edit Del	Test Class	
Edit Del	Visual Force	

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CREATE RESOURCES (EMPLOYEES)

(Click Resources → New and enter all required fields for all of Employees in your organization)

NOTE: Alternatively we can provide Data Load Templates and Data Load Scripts to load Resource & Skill / Sub-skill records and associate each other. Please reach out to us @ info@tugboat.in

The screenshot shows the 'New Resource' form in the Emplify app. The 'Resources' menu item is circled in red. The form is titled 'Resource Edit' and 'New Resource'. It includes a search bar at the top and a navigation bar with tabs: Home, Accounts, Skills, Resources, Projects, Positions, Fulfillment, Reports, Dashboards. The form fields are organized into two columns. The left column contains: Employee #, First Name, Last Name, Business Unit, Location (dropdown), Reports To, and PhotoGraph. The right column contains: Mobile, Phone, Email, Previous Exp(Months), Date of Joining (with a date picker showing 27/6/2014), Band (dropdown), and Role (dropdown). A legend at the top right indicates that red vertical bars next to fields denote required information. The PhotoGraph field has a rich text editor interface with various icons for text formatting and image handling.

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ASSOCIATE EMPLOYEE SKILL SET VIA ADD SKILLS BUTTON

(Click Add Skills → Select Sub-skills & Proficiency value as shown below to each Employee)

The screenshot displays the Emplify app interface. At the top, there is a navigation bar with the following tabs: Home, Accounts, Skills, **Resources** (highlighted with a red circle), Projects, Positions, Fulfillment, Reports, and Dashboards. The 'Resources' tab is active, showing the 'Resource Detail' for employee TIS0002. The 'Add Skills' button is also highlighted with a red circle. Below the 'Resource Detail' section, there is a 'Resource Skill Entries' table with columns: Action, Resource Skill Entry Name, Used Currently, Sub-Skill, and Proficiency. The table lists four skill entries for employee TIS0002. At the bottom of the page, there is a 'Back To Top' link and a note: 'Always show me more records per related list'.

Resource Detail

Employee # TIS0002
First Name Swapna
Last Name Rao
Business Unit Customer Relationship Management (CRM)
Status OnBench
Location OffShore
Reports To TIS0001
PhotoGraph 

Mobile 9880198802
Phone
Email srao@tugboat.in
Previous Exp(Months) 30
Date of Joining 1/12/2011
Total Exp(Months) 61
Band B2
Role Tech Lead

Resource Skill Entries

Action	Resource Skill Entry Name	Used Currently	Sub-Skill	Proficiency
Edit Del	RSK-000006	☐	Test Class	4-Proficient
Edit Del	RSK-000007	☐	DEV 401 Certification	5-Expert
Edit Del	RSK-000004	☐	Visual Force	3-Competent
Edit Del	RSK-000005	☐	Apex	5-Expert

Always show me more records per related list

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CREATE NEW CUSTOMER PROJECTS

(Click Projects → New as shown below)

The screenshot displays the Emplify application interface. At the top, there is a navigation bar with the following tabs: Home, Accounts, Skills, Resources, **Projects** (circled in red), Positions, Fulfillment, Reports, and Dashboards. The 'Projects' tab is active, showing the 'New Project' form. The form is titled 'Project Edit' and 'New Project'. It contains the following fields:

- Project Name: Cloud CRM
- Account: iSeek
- Business Unit: Customer Relationship M
- Start Date: 4/8/2014 [25/6/2014]
- Planned End Date: 31/10/2014 [25/6/2014]
- Project Manager: TIS0001
- Project Type: Implementation

At the bottom of the form, there are three buttons: Save, Save & New, and Cancel. The footer of the page contains the copyright information: Copyright © 2000-2014 salesforce.com, inc. All rights reserved. | [Privacy Statement](#) | [Security Statement](#) | [Terms of Use](#) | [508 Compliance](#).

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CREATE NEW POSITION(S) FOR THE PROJECT AND ASSOCIATE REQUIRED SKILLS

(Click Positions → New & post save, Click Add Skills as shown below)

Position Edit [Save] [Save & New] [Cancel]

Information ⓘ = Required Information

of Positions: 1

Skill: Salesforce.com ⓘ

Planned Start Date: 1/9/2014 ⓘ [25/6/2014]

Planned End Date: [Calendar: September 2014, 1st highlighted]

Location: 31 ⓘ

Status: 7 ⓘ

Requester Emp Name: D Sharma

Project: Cloud CRM ⓘ

Remarks/Notes: Salesforce.com developer requirement for iSeek customer project ⓘ

[Save & New] [Cancel]

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[Home](#) [Accounts](#) [Skills](#) [Resources](#) [Projects](#) **[Positions](#)** [Fulfillment](#) [Reports](#) [Dashboards](#) +



Position
0001

[← Back to List: Resources](#)

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#) ?

[Resource Request Skill Entries](#) [0] | [Project Resources](#) [0]

Position Detail

Indent #	0001	Resource Manager	CRM Resource Manager
# of Positions	1	Resource Mgr eMail	anand.chagi@tuqboat.in
Skill	Salesforce.com	Requester Emp Name	D Sharma
Planned Start Date	1/9/2014	Account	iSeek
Planned End Date	31/10/2014	Project	Cloud CRM
Duration(Mths)	2	Alert	
Location	OffShore	Remarks/Notes	Salesforce.com developer requirement for iSeek customer project
Status	Open		



Select Sub Skills

Enter your keyword and filter criteria, then click Search to begin your search. Search results include all records that match both your keyword and filter entries.

Find Sub Skills

By Keyword

By Field Filter

--None-- ▾

--None-- ▾

--None-- ▾

--None-- ▾

☐	Skill	SubSkill	Description	Proficiency
☐	Salesforce.com	ADM 201 Certification		--None-- ▾
☒	Salesforce.com	Apex		3-Competent ▾
☐	Salesforce.com	DEV 401 Certification		--None-- 1-Trained 2-Novice 3-Competent 4-Proficient 5-Expert
☒	Salesforce.com	Test Class		
☒	Salesforce.com	Visual Force		

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GO TO FULFILLMENT TAB AND CLICK ON INDENT # TO REVIEW AVAILABLE EMPLOYEES

(Click Fulfillment → drilldown on Indent # to fulfill as shown below)

emplify
Employee Management, Simplified...

Search... Search

D Sharma Setup Help & Training Emplify

Home Accounts Skills Resources Projects Positions **Fulfillment** Reports Dashboards +

New Open Position

▼ Status and their Count

Processing Open

Open: 3

Open Processing

▼ Open Positions

Show 10 entries Search:

Indent #	Account	Skill	# of Positions	Duration(Mths)	Location	Status	Alert
0001	iSeek	SFDC	1	2	OffShore	Processing	
0002	Arshan	Siebel	1	6	OffShore	Processing	
0003	Arshan	QA	1	3	OffShore	Open	
0004	iSeek	QA	1	1	OffShore	Open	
0000	iSeek	SFDC	1	3	OffShore	Open	

Showing 1 to 5 of 5 entries

First Previous 1 Next Last

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CLICK ON CHECK AVAILABILITY BUTTON TO GET THE LIST OF BEST FIT EMPLOYEES

(Click Check Availability button as shown below)

The screenshot displays the Emplify app interface. At the top, there is a search bar and navigation links for D Sharma, Setup, Help & Training, and Emplify. The main navigation bar includes Home, Accounts, Skills, Resources, Projects, Positions (selected), Fulfillment, Reports, and Dashboards. The 'Position Detail' page for Position 0001 is shown, with a 'Back to List: Accounts' link. The page includes a 'Resource Request Skill Entries [3] | Project Resources [0]' section. The 'Position Detail' section contains a table with fields: Indent # (0001), # of Positions (1), Skill (SFDC), Planned Start Date (1/9/2014), Planned End Date (31/10/2014), Duration(Mths) (2), Location (OffShore), and Status (Processing). To the right of this table are fields for Resource Manager (CRM Resource Manager), Resource Mgr eMail (anand.chagi@tuqboat.in), Requester Emp Name (D Sharma), Account (iSeek), Project (Cloud CRM), and Alert (a green flag icon). A 'Remarks/Notes' field contains the text 'Salesforce.com developer requiriment for iSeek customer project'. Below the 'Position Detail' section is a 'Resource Request Skill Entries' table with columns: Action, Sub Skill Name, Proficiency, and Key. The table lists three entries: Apex (3-Competent, checked), Test Class (3-Competent, unchecked), and Visual Force (4-Proficient, unchecked). The 'Check Availability' button is circled in red in the top right corner of the 'Position Detail' section.

Position Detail

Indent #	0001	Resource Manager	CRM Resource Manager
# of Positions	1	Resource Mgr eMail	anand.chagi@tuqboat.in
Skill	SFDC	Requester Emp Name	D Sharma
Planned Start Date	1/9/2014	Account	iSeek
Planned End Date	31/10/2014	Project	Cloud CRM
Duration(Mths)	2	Alert	
Location	OffShore	Remarks/Notes	Salesforce.com developer requiriment for iSeek customer project
Status	Processing		

Resource Request Skill Entries

Action	Sub Skill Name	Proficiency	Key
Edit Del	Apex	3-Competent	☒
Edit Del	Test Class	3-Competent	☐
Edit Del	Visual Force	4-Proficient	☐

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CHECK SELECT BOX AND CLICK SELECT BUTTON TO ADD RESOURCE TO THE PROJECT

(Select best fit candidate & Click Select to associate the resource to the Project as shown below)

Note: Best fit list provided by the system contains the candidates who are either not assigned to any project or who are getting released in next 1 months' time.

The screenshot displays the Emplify app interface. At the top, there's a search bar and navigation links. The main menu includes Home, Accounts, Skills, Resources, Projects, Positions, Fulfillment (active), Reports, and Dashboards. The Fulfillment section shows details for a position with Indent # 0001, Skill SFDC, and Account iSeek. Below this, the 'Available Resources' table lists four candidates. The 'Select' checkbox for Swapna Rao is highlighted with a red circle. Below the table, the 'Selected :1' status is shown, and the 'Select' button is also highlighted with a red circle.

Select	Resource Name	Key Skill Matched?	Rating %	Avg. Proficiency	% Skill Match	Location
☒	Swapna Rao	☒	90.0	★★★★★	100.0 %	OffShore
☐	Anand Sharma	☒	80.0	★★★★☆	100.0 %	OffShore
☐	Suhas Chagi	☒	60.0	★★★★☆	100.0 %	OffShore
☐	Manjunath Kolvi	☐	40.0	★★★★☆	67.0 %	OffShore

Showing 1 to 4 of 4 entries

Selected :1

Select Cancel

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BASIC REPORTING PROVIDED UNDER REPORTS

(Go to Reports tab as shown below to run required reports)

The screenshot shows the Emplify app interface. The top navigation bar includes tabs for Home, Accounts, Skills, Resources, Projects, Positions, Fulfillment, **Reports**, and Dashboards. The 'Reports' tab is highlighted. Below the navigation bar, the 'Reports & Dashboards' section is visible. On the left, there is a 'Folders' sidebar with a search bar and a list of folders. The folder 'WorkForce App Reports (Installed Package)' is circled. The main content area displays a list of reports under the heading 'WorkForce App Reports (Installed Package: Emplify for Workforce Management)'. The reports listed are:

Action	Name	Folder	Created By
	Bulge Graph	WorkForce App Reports	Sharma_D
	Open position with alert	WorkForce App Reports	Sharma_D
	Open Positions Report This report gives the detail of open positions for weekly/monthly based on specified date ranges. The default is one month. The date ranges can be change	WorkForce App Reports	Sharma_D
	Resource Skill Proficiency Matrix	WorkForce App Reports	Sharma_D
	Resource utilization and bench report This report tells the details about resource status in th organization	WorkForce App Reports	Sharma_D

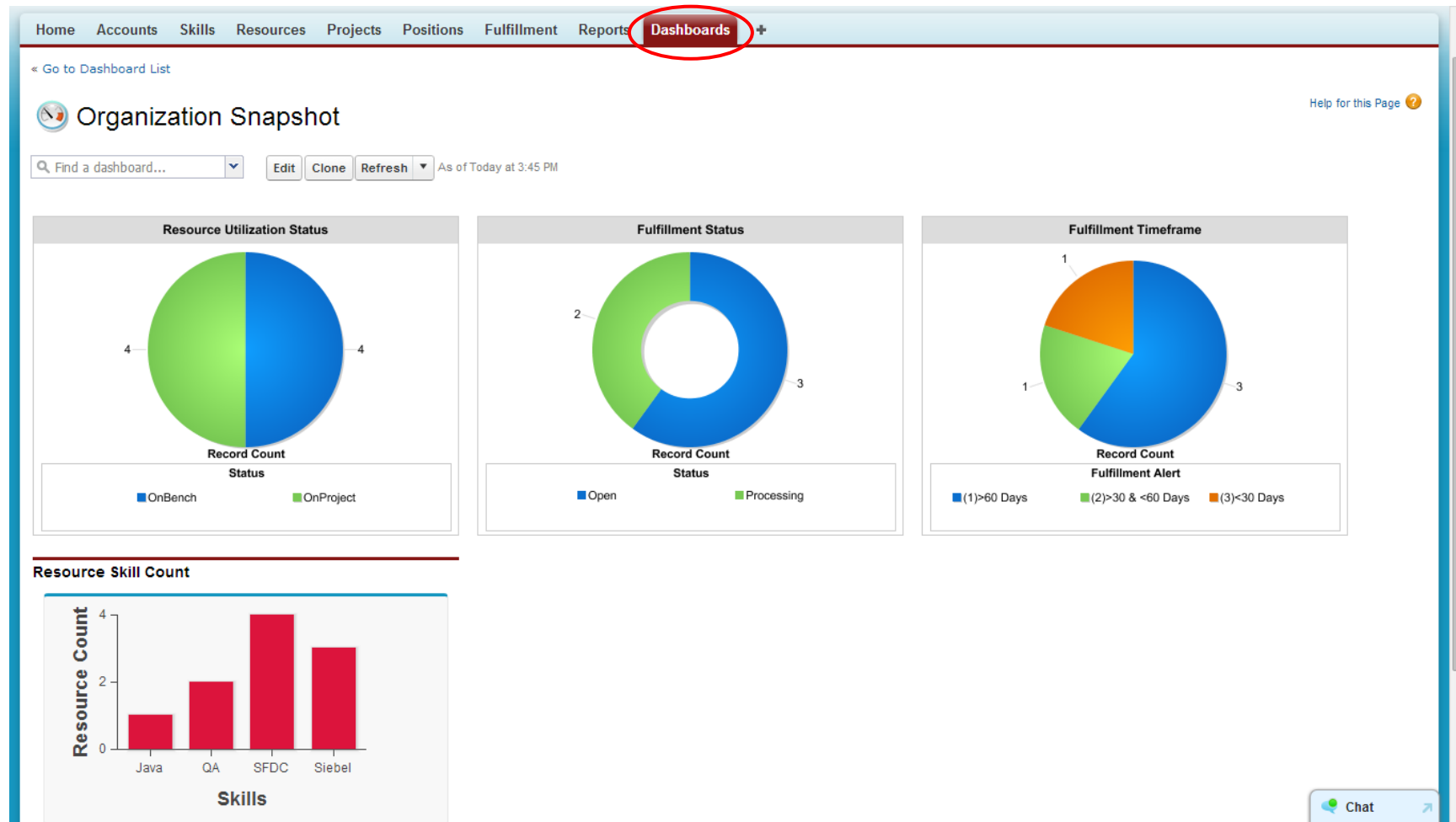
At the bottom of the page, there is a footer with copyright information: Copyright © 2000-2014 salesforce.com, inc. All rights reserved. | [Privacy Statement](#) | [Security Statement](#) | [Terms of Use](#) | [508 Compliance](#). There is also a 'Chat' button in the bottom right corner.

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DASHBOARD PROVIDES ORGANIZATION-WIDE STATUS SNAPSHOT

(Go to Dashboard tab as shown below to get quick data snapshot)

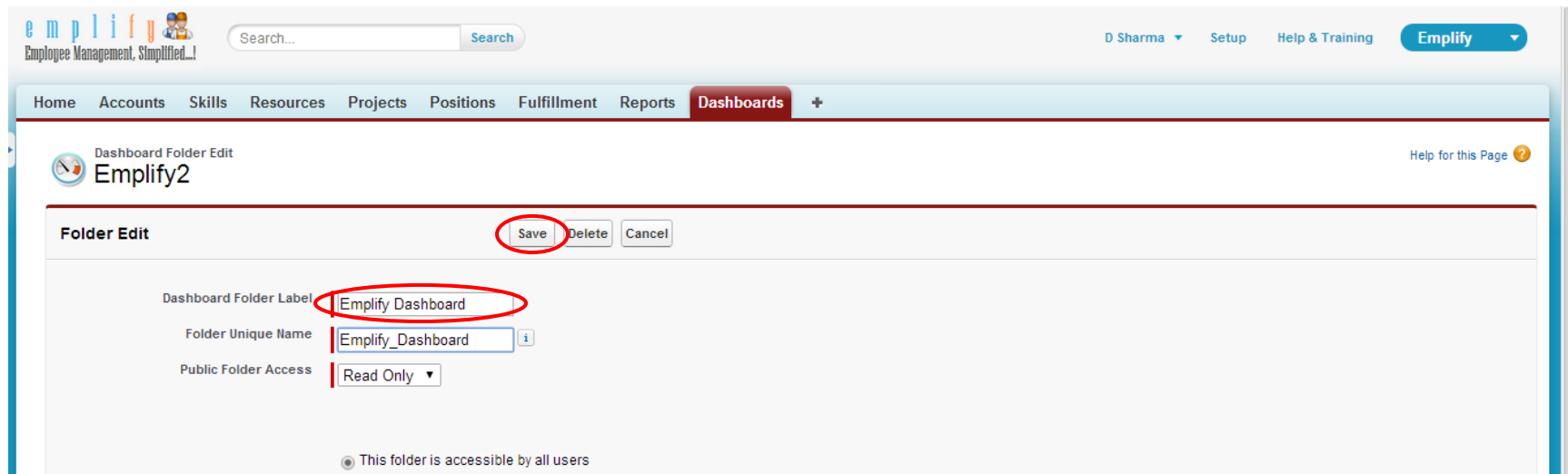
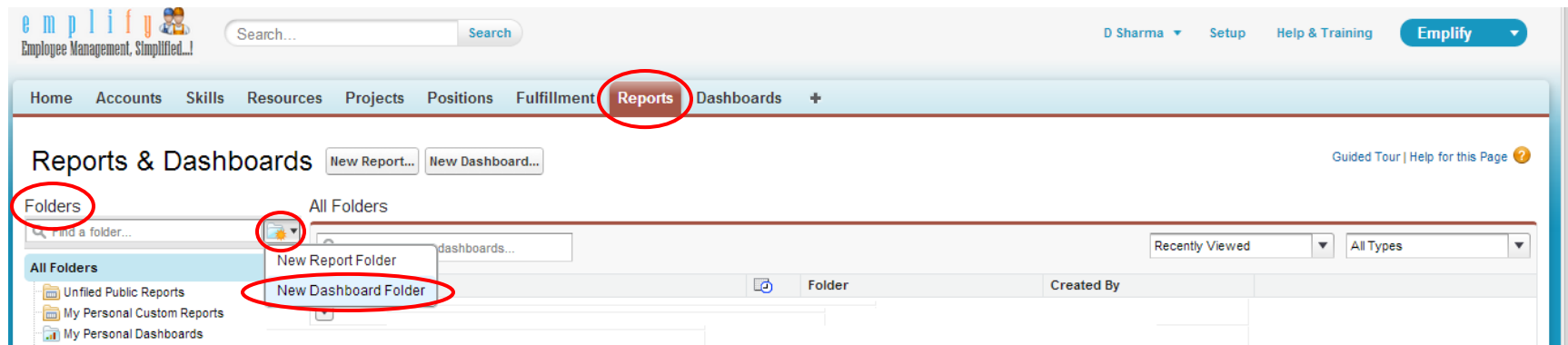
Note: Separate setup required to view below snapshots; please refer Dashboard setup details provided in next pages.



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CREATE NEW DASHBOARD FOLDER

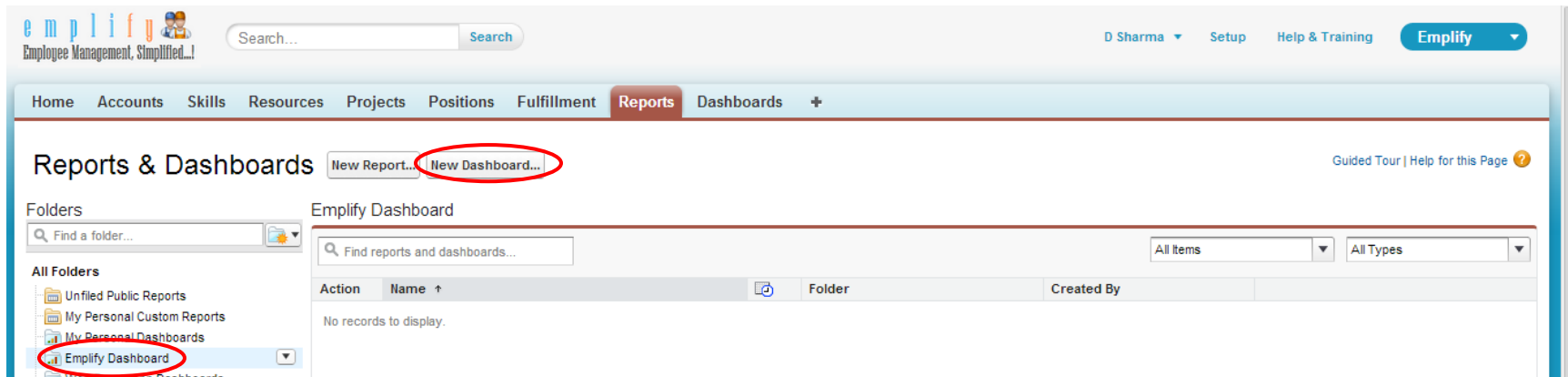
(Click Reports → New Dashboard Folder and input unique Folder name and save as shown below)



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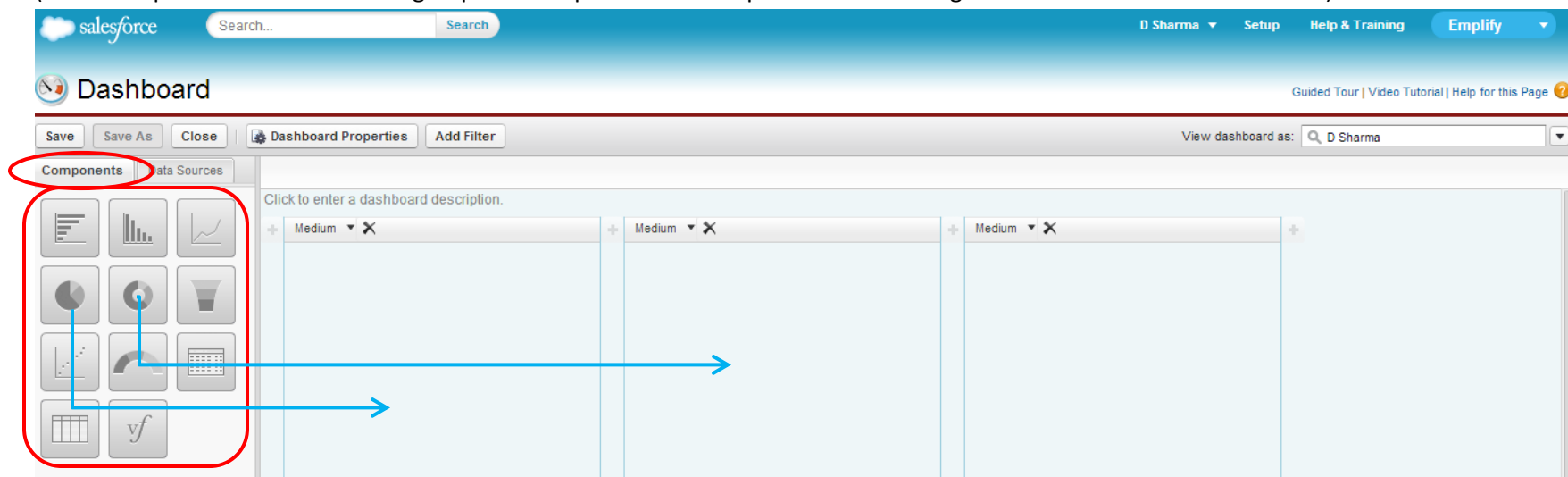
CREATE NEW DASHBOARD

(Once new Folder is saved, click 'New Dashboard' button as shown below, which will take you to Dashboard Tab)



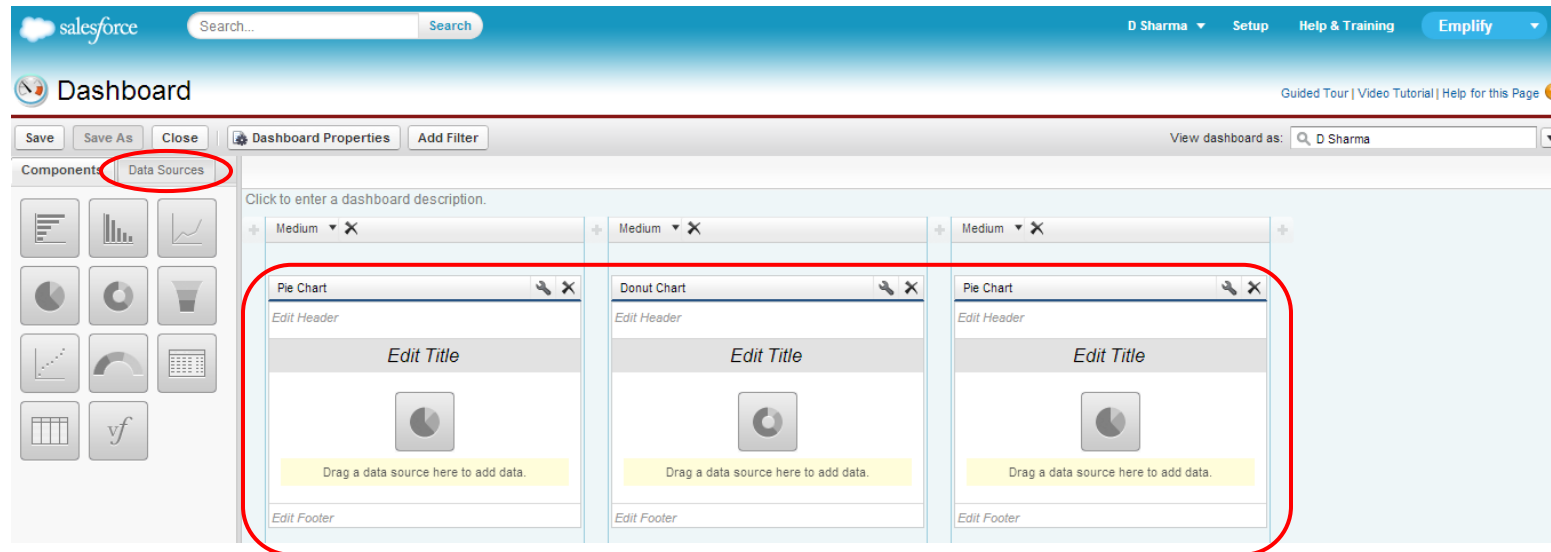
DESIGN NEW DASHBOARD

(Click 'Components' button and drag required component into the placeholder to design new Dashboard as shown below)

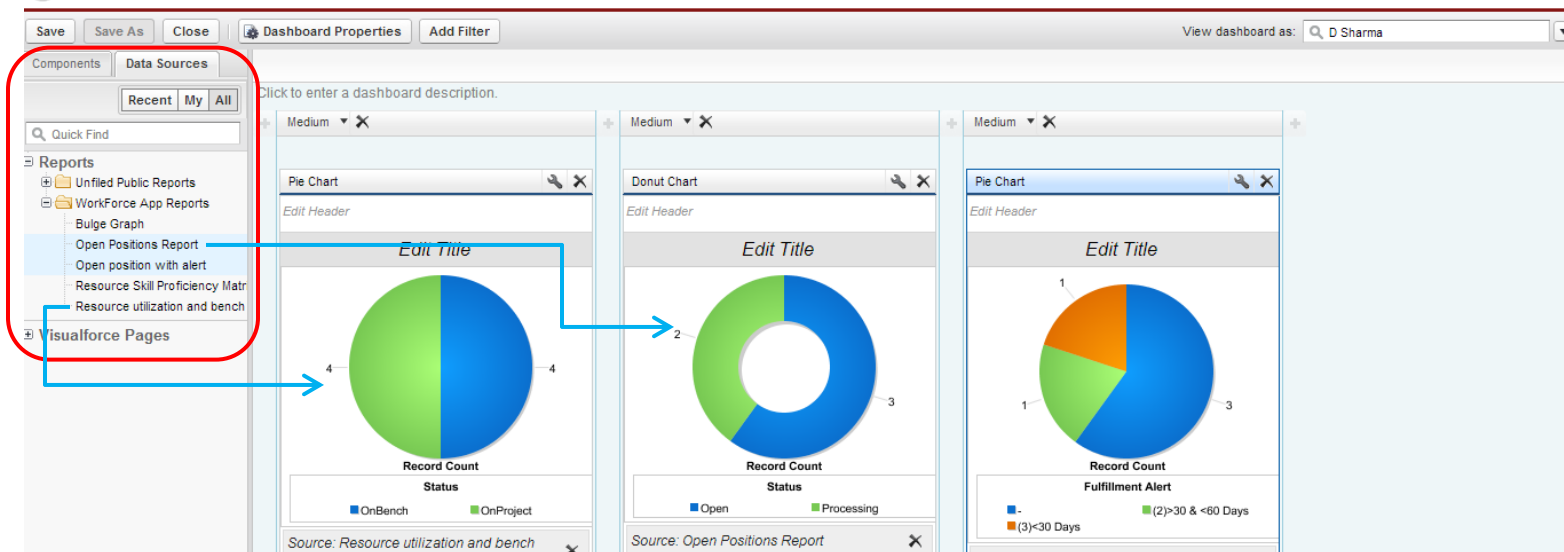


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(Once required components pulled into the placeholder, Click Data Sources tab as shown below)

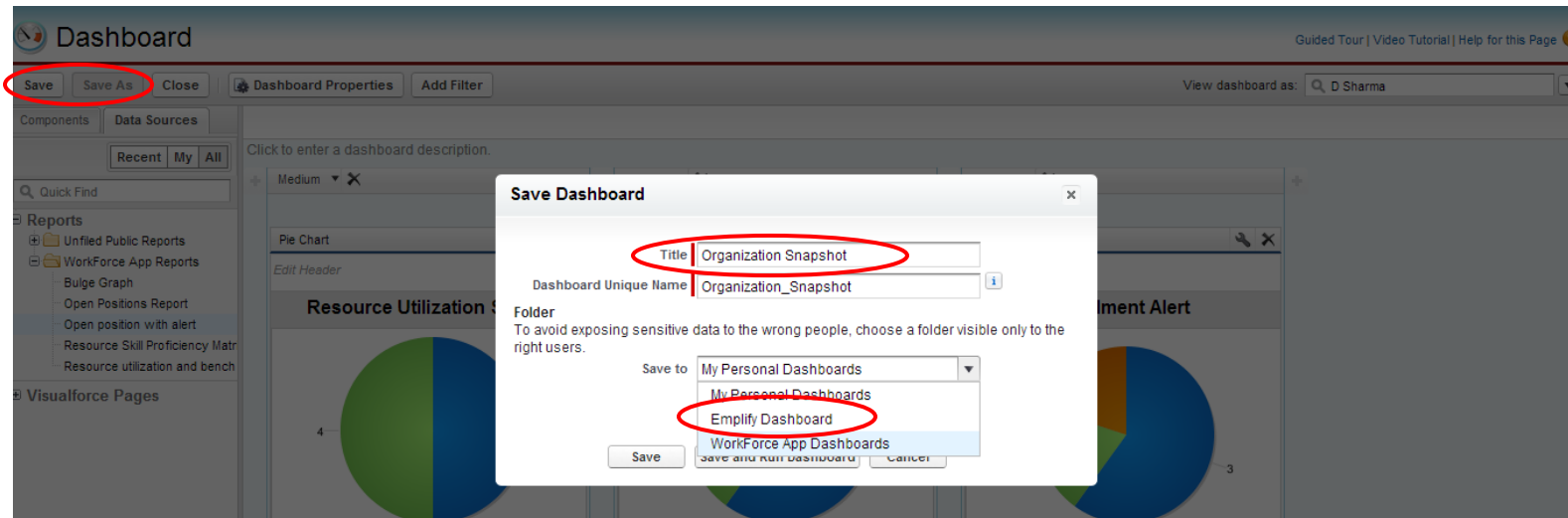


(Drag required Reports / Visualforce Pages into the placeholders to build the dashboard as shown below)



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(Once you edit the title for each Dashboard item, Click Save As and save Dashboard with a unique name as shown below)



(Once you click Save & Run button on the popup box, you will get your new Dashboard as shown below)

