Tugboat Info Solutions

emplify
Employee Management, Simplified...!

'Emplify' App User Manual

V1.2

Tugboat

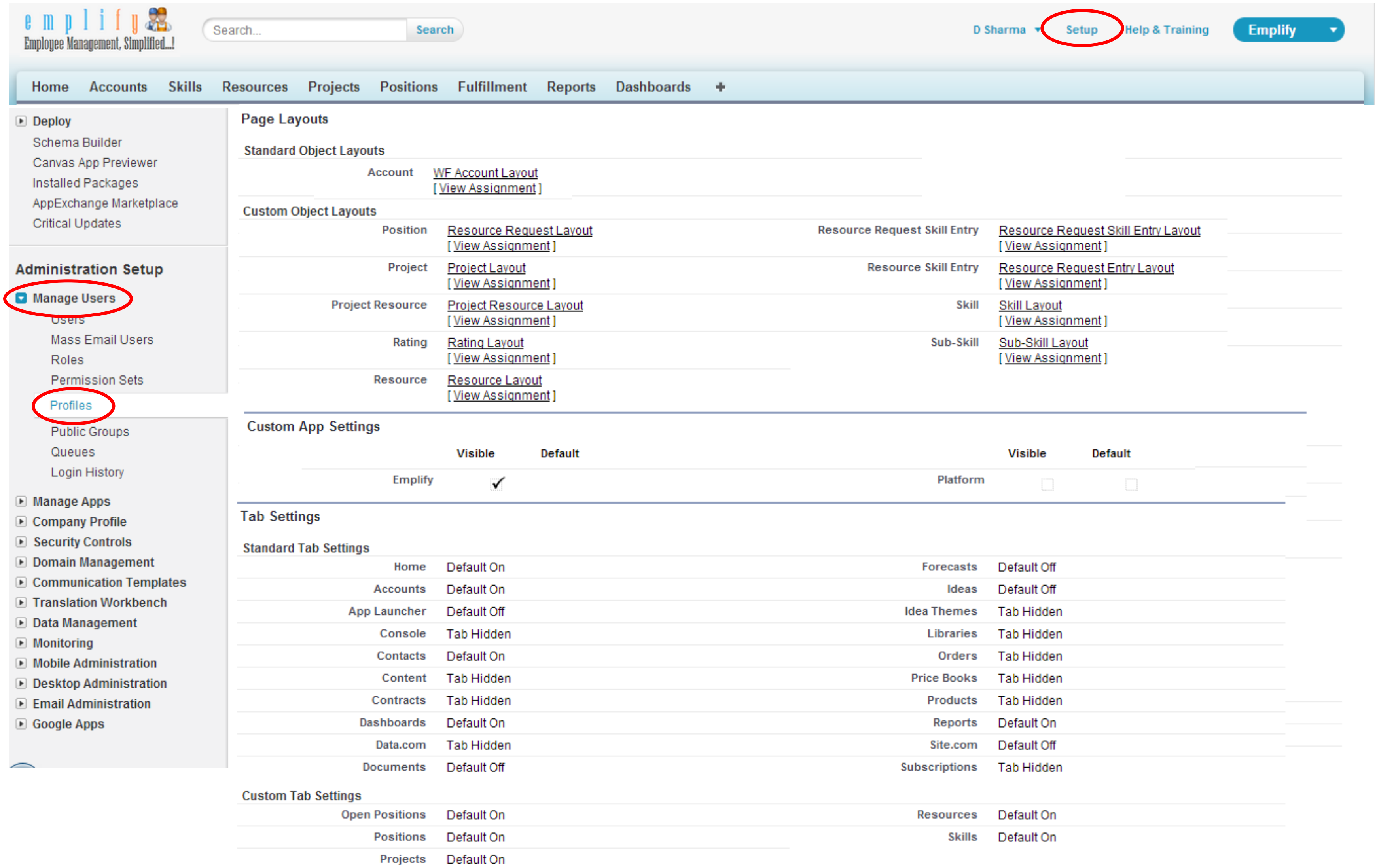
2014

www.tugboat.in

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”



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

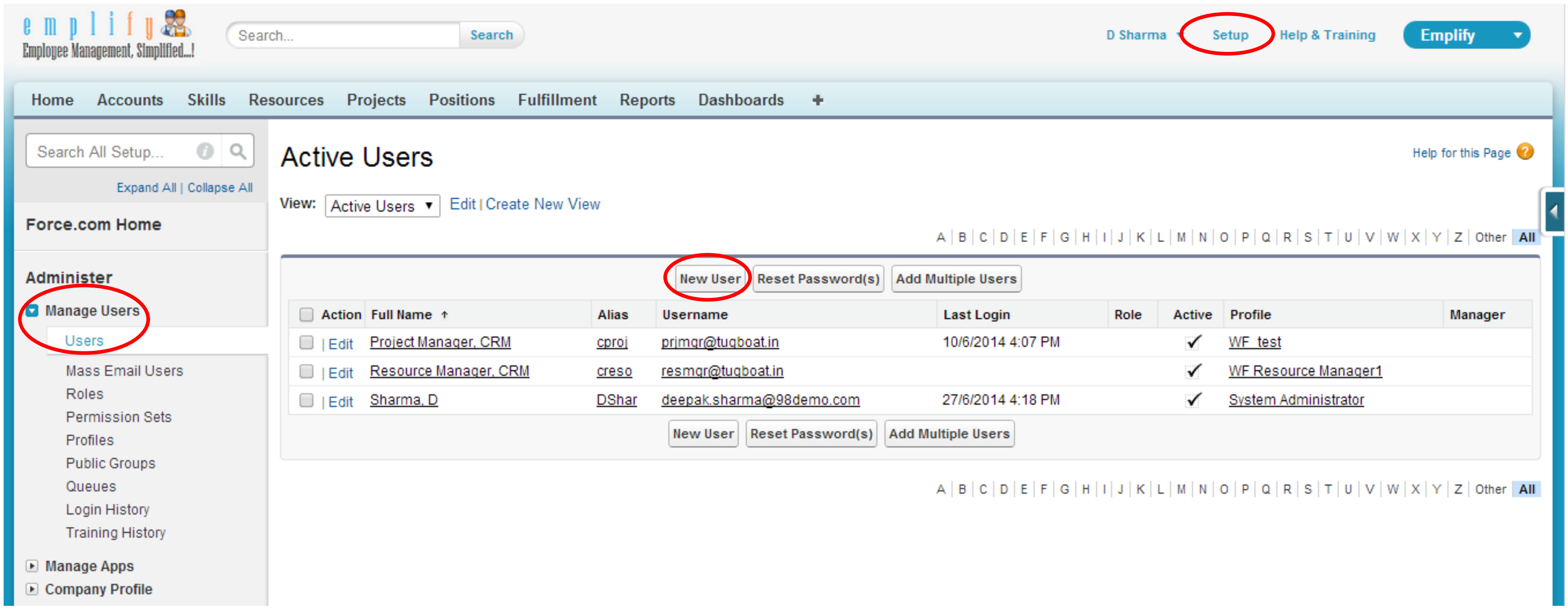
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	✓	✓	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	✓	✓
Documents	✓	✓	✓	✓	☐	☐
Ideas	✓	✓				
Push Topics	☐	☐	☐	☐		

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Positions	✓	✓	✓	✓	✓	✓
Projects	✓	✓	✓	✓	✓	✓
Project Resources	✓	✓	✓	✓	✓	✓
Ratings	✓	✓	✓	✓	✓	✓
Resources	✓	✓	✓	✓	✓	✓
Resource Request Skill Entries	✓	✓	✓	✓	✓	✓
Resource Skill Entries	✓	✓	✓	✓	✓	✓
Skills	✓	✓	✓	✓	✓	✓
Sub-Skills	✓	✓	✓	✓	✓	✓

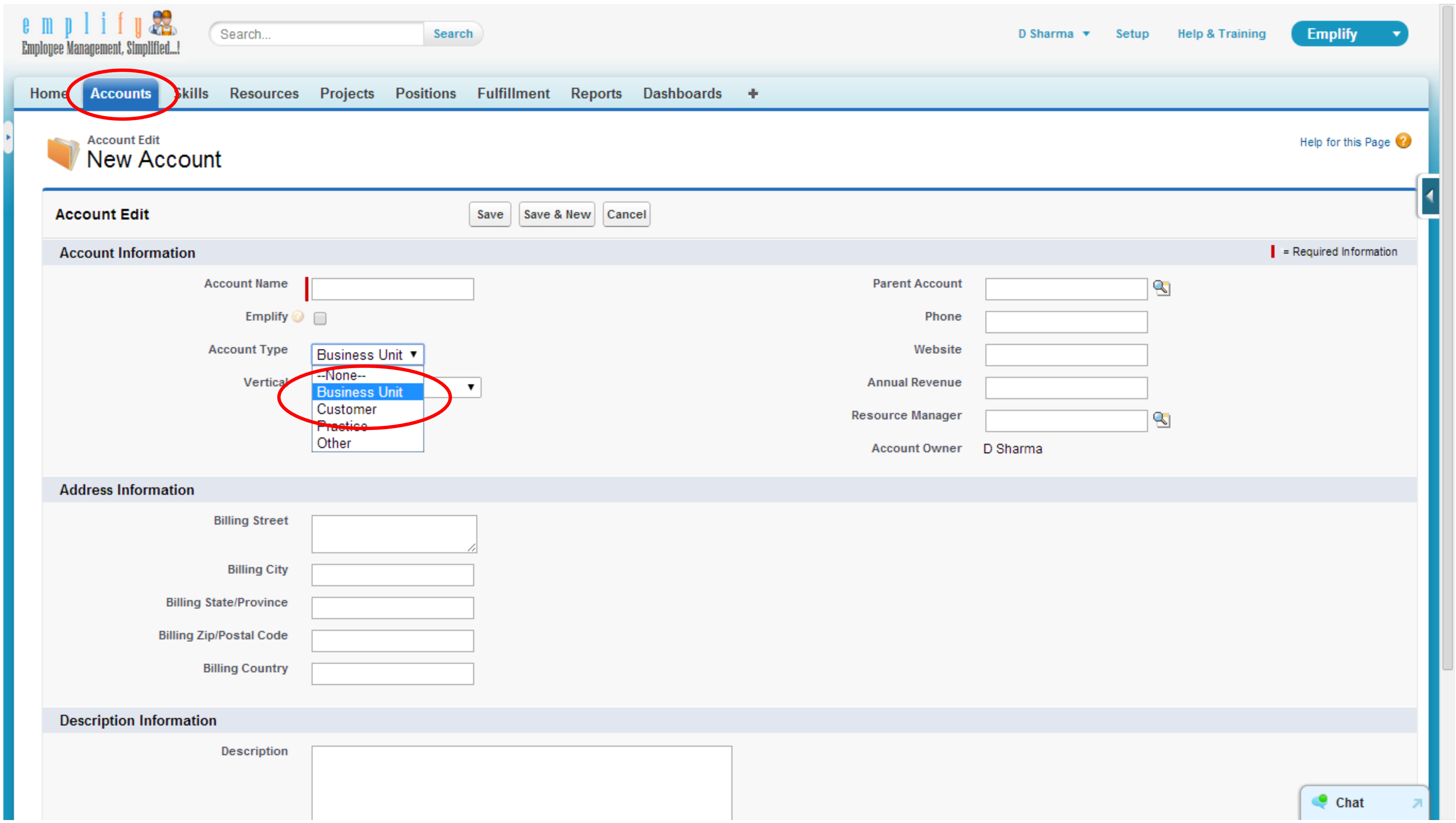
CREATE RESOURCE MANAGER & PROJECT MANAGER USERS FOR EACH INTERNAL BUSINESS UNITS (EXAMPLE CRM) & ASSOCIATE EMPLIFY SPECIFIC PROFILE TO THOSE USERS

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



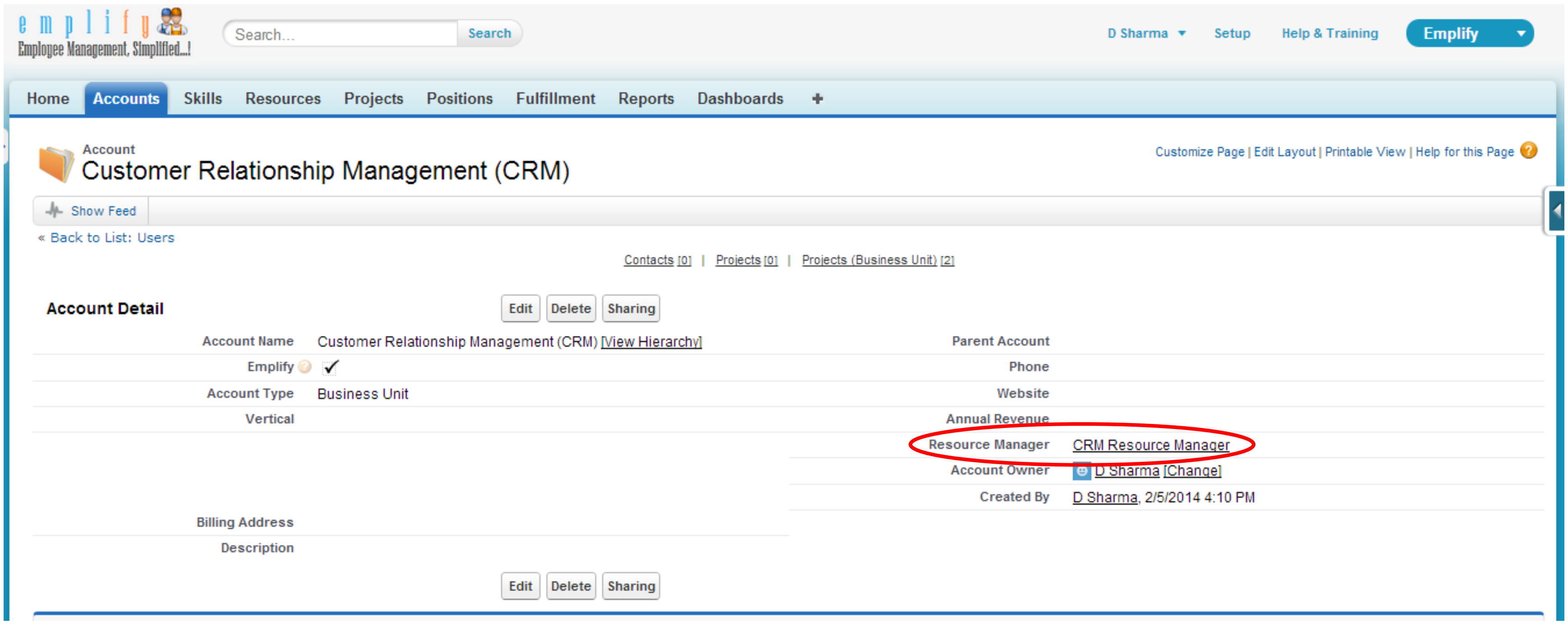
CREATE ACCOUNT OF TYPE BUSINESS UNIT (INTERNAL) & CUSTOMER (EXTERNAL) AS REQUIRED

(Click Account → New as shown below)



ASSOCIATE RESOURCE MANAGER TO THE BUSINESS UNIT

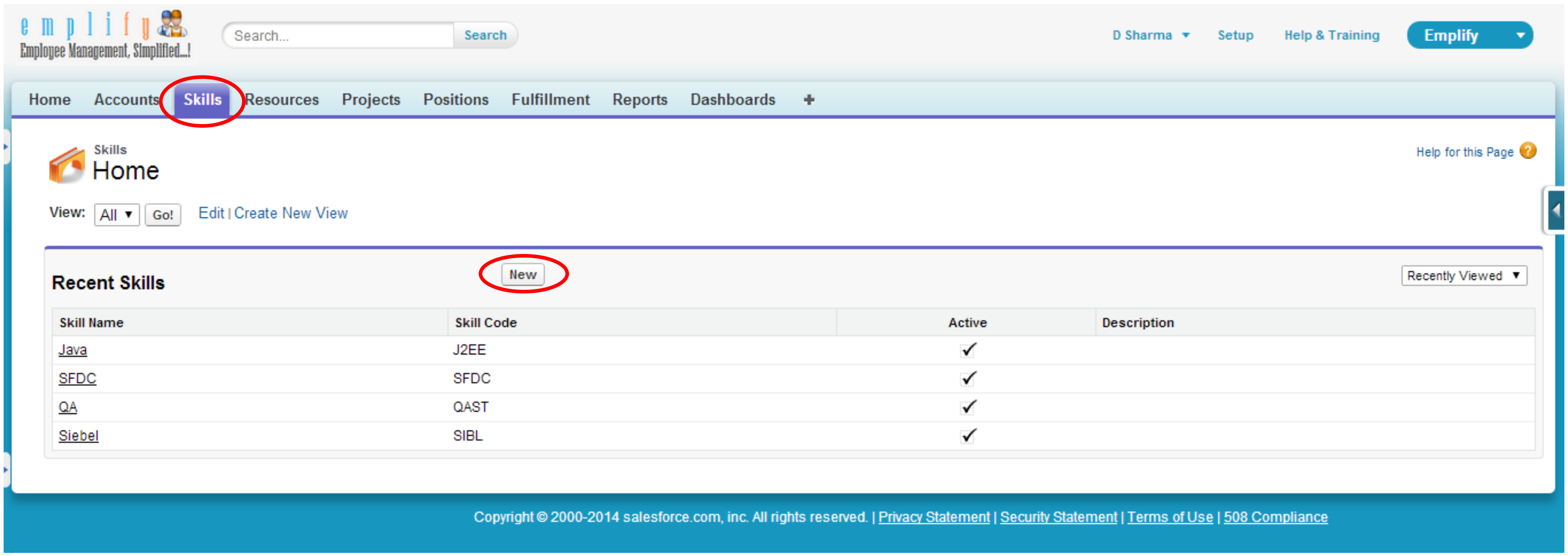
(Associate as shown below)



Create New Skills for your Organization

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

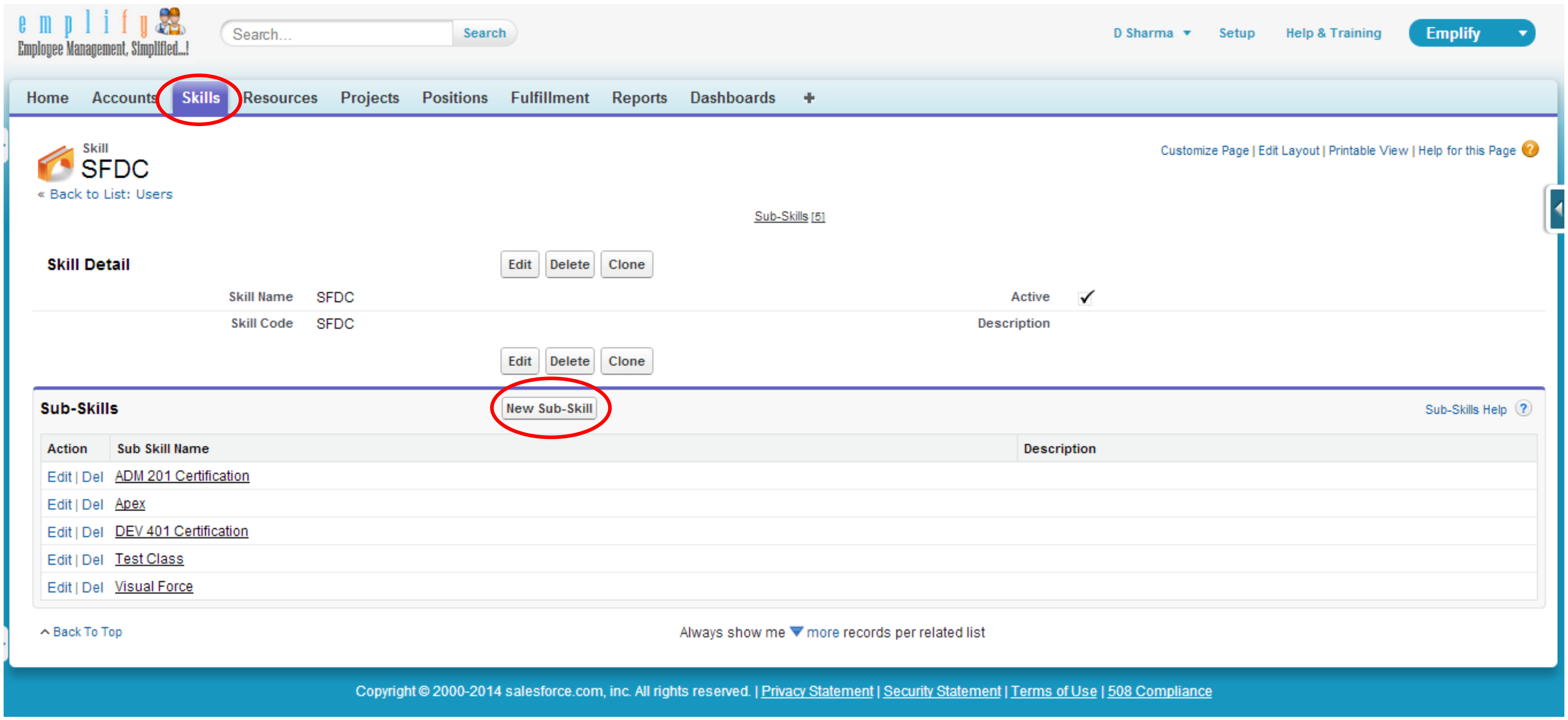
NOTE: Alternatively we can provide Data Load Templates and Data Load Scripts to load Resource & Skill / Sub-skill records and associate each other. Please reach out to us @ info@tugboat.in



CREATE NEW SUB-SKILLS

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

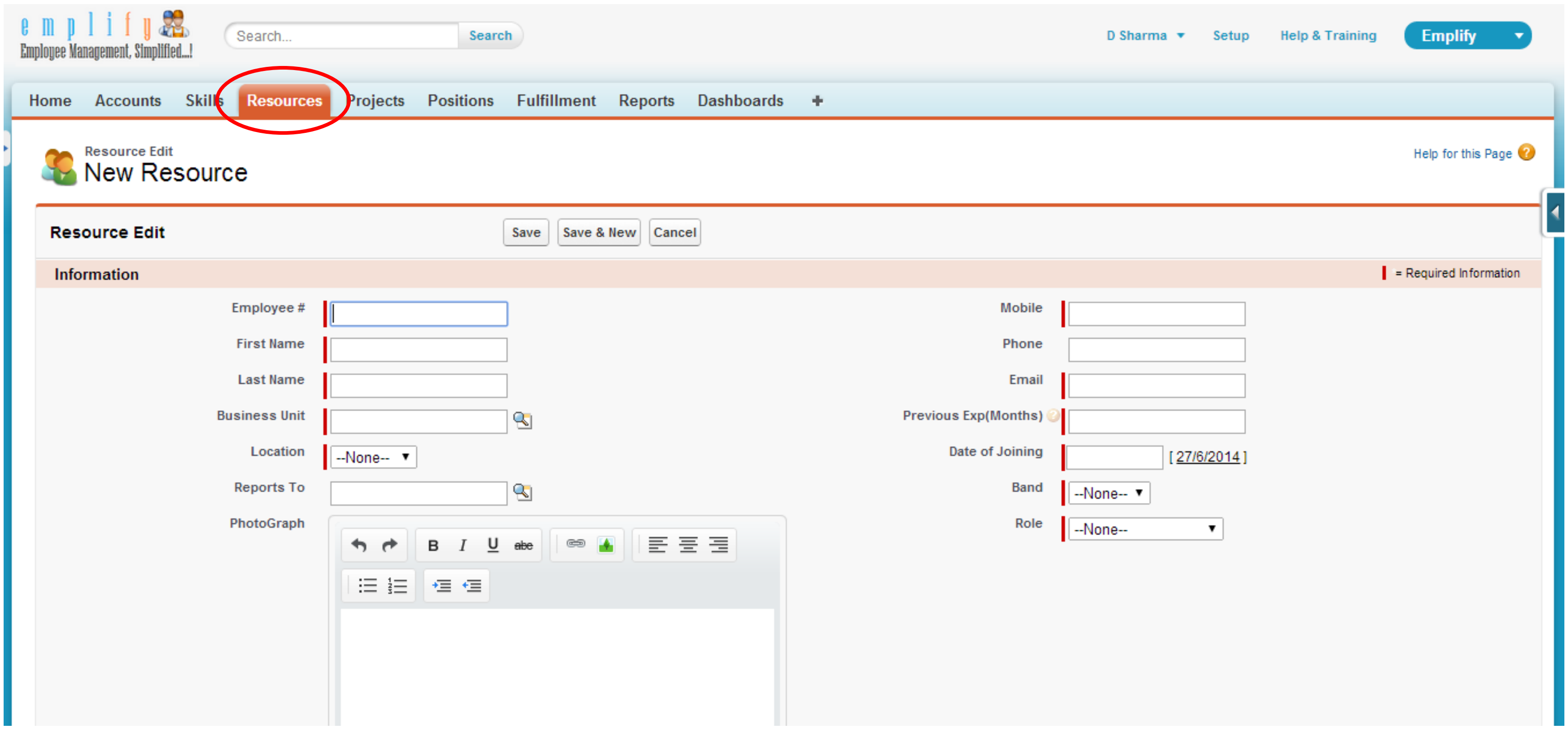
NOTE: Alternatively we can provide Data Load Templates and Data Load Scripts to load Resource & Skill / Sub-skill records and associate each other. Please reach out to us @ info@tugboat.in



CREATE RESOURCES (EMPLOYEES)

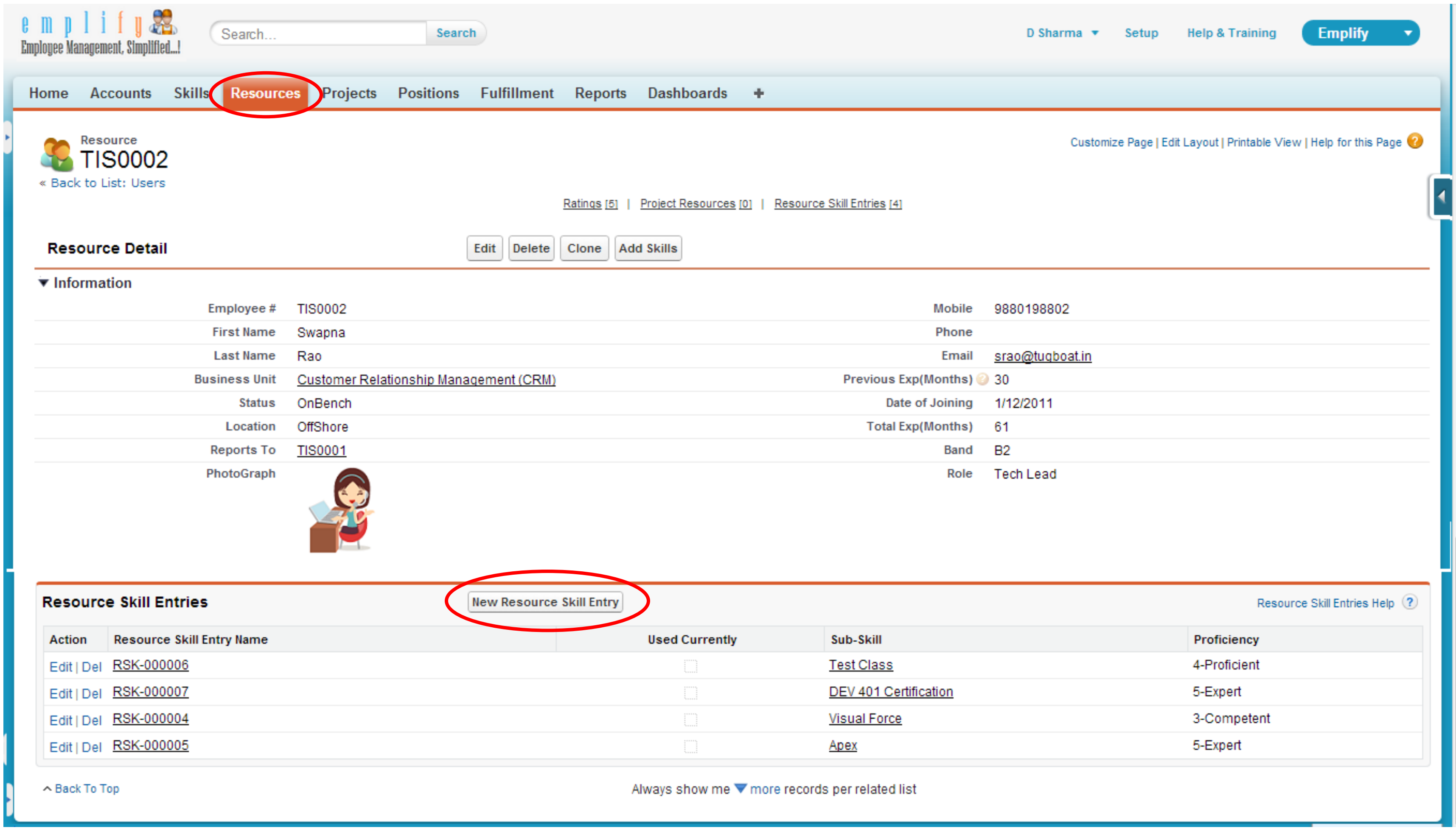
(Click Resources → New and enter all required fields for all of Employees in your organization)

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



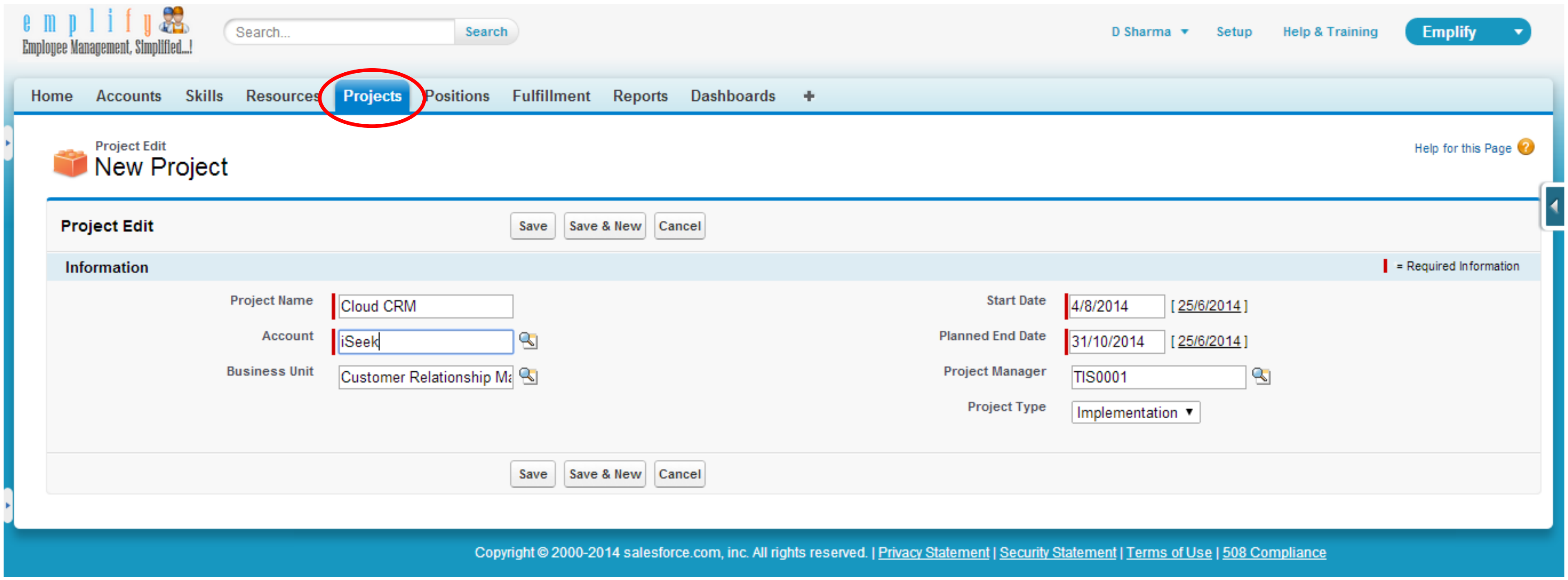
Associate Employee Skill Set via Add Skills button

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



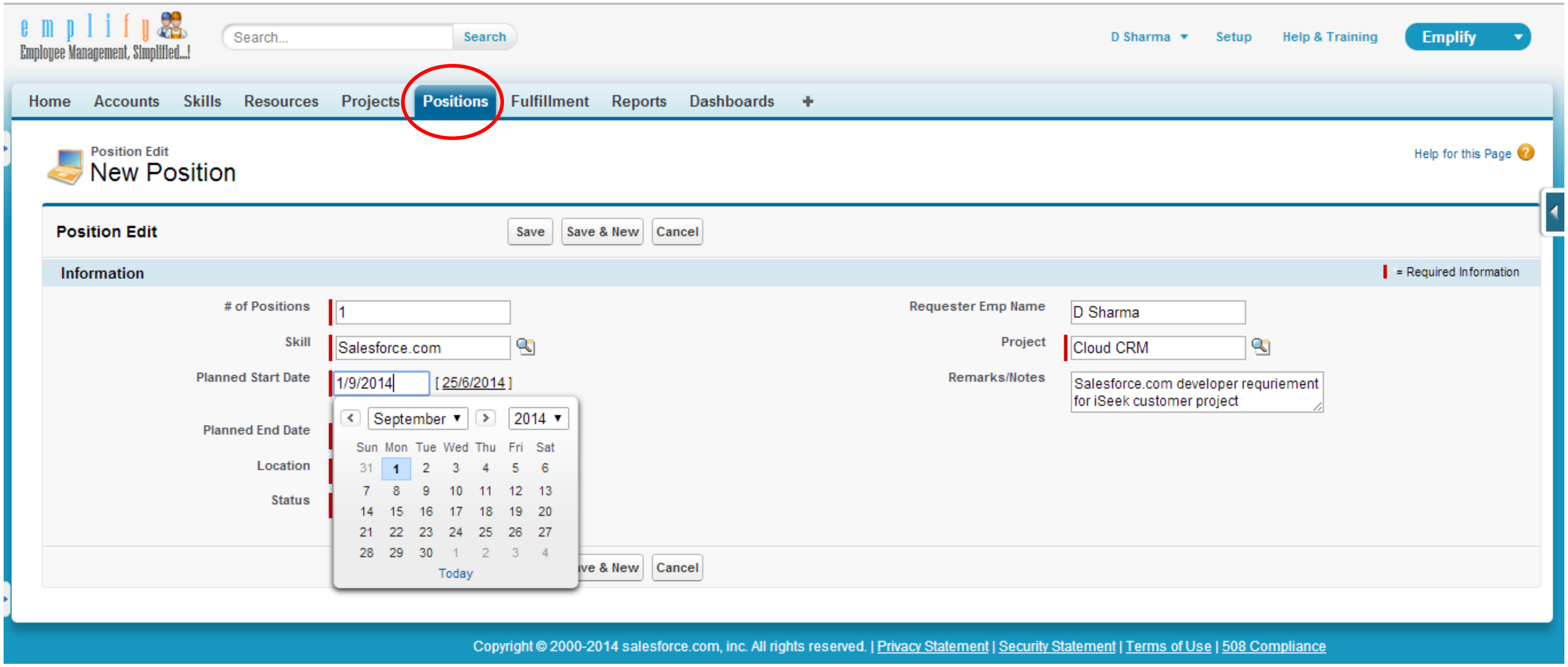
CREATE NEW CUSTOMER PROJECTS

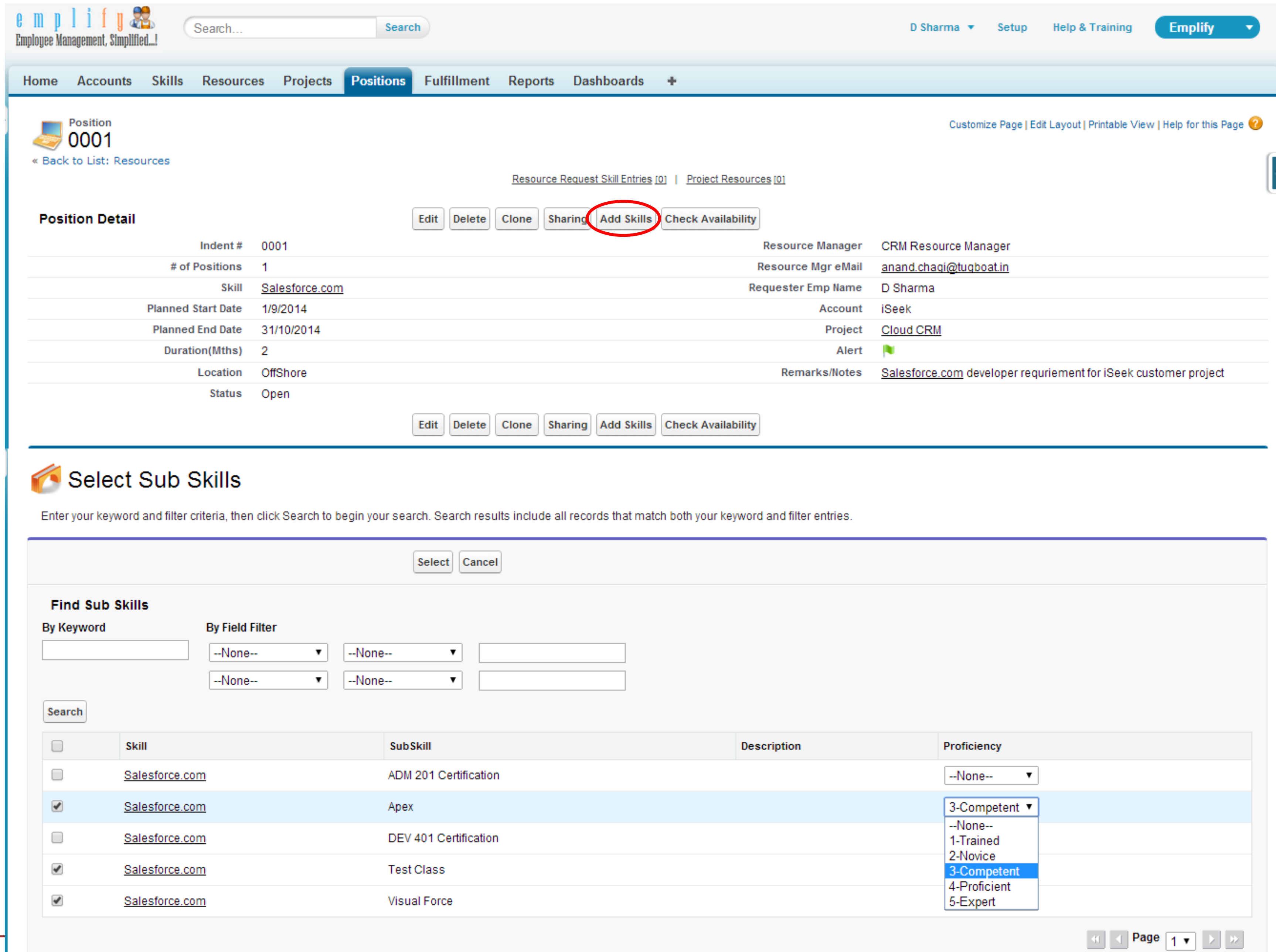
(Click Projects → New as shown below)



Create new Position(s) for the Project and associate required Skills

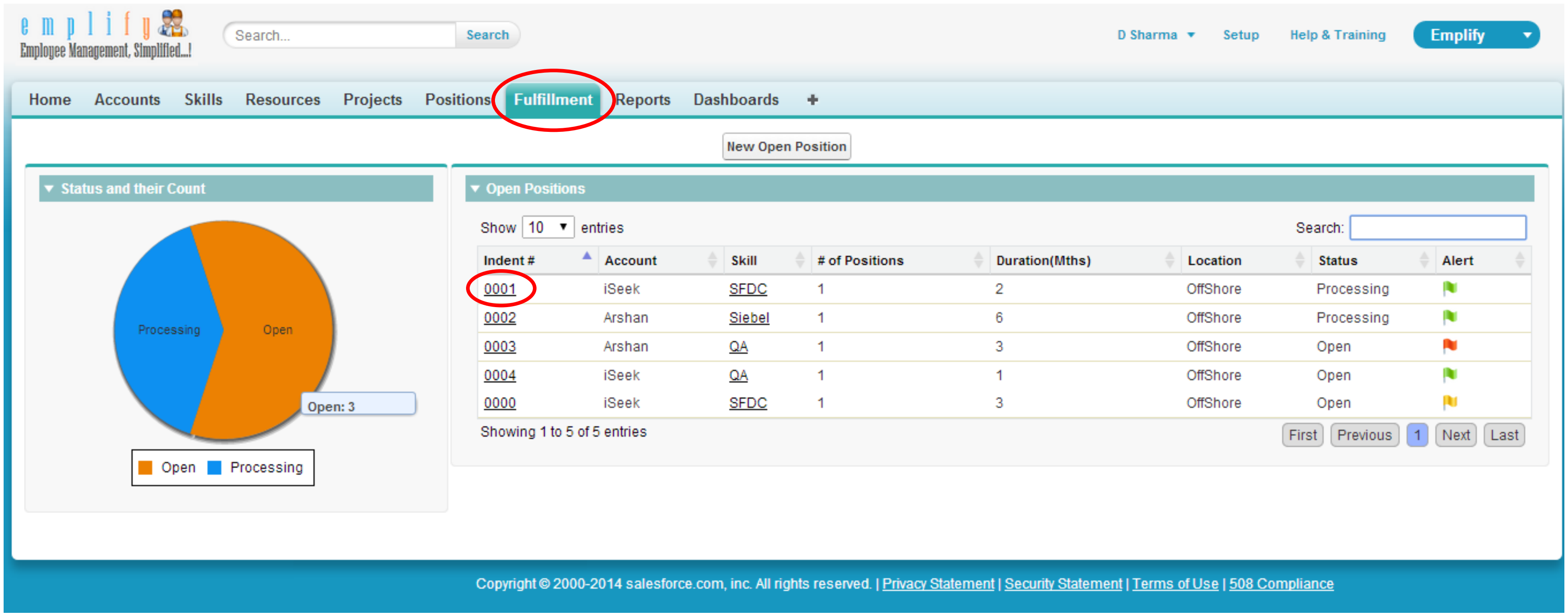
(Click Positions → New & post save, Click Add Skills as shown below)




Employee Management, Simplified..!
Search...
Search
D Sharma
Setup
Help & Training
Emplify
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
Edit
Delete
Clone
Sharing
Add Skills
Check Availability
Indent # 0001
# of Positions 1
Skill Salesforce.com
Planned Start Date 1/9/2014
Planned End Date 31/10/2014
Duration(Mths) 2
Location OffShore
Status Open
Resource Manager CRM Resource Manager
Resource Mgr eMail anand.chagi@tugboat.in
Requester Emp Name D Sharma
Account iSeek
Project Cloud CRM
Alert
Remarks/Notes Salesforce.com developer requriement for iSeek customer project
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.
Select
Cancel
Find Sub Skills
By Keyword
By Field Filter
--None--
Search
Skill
SubSkill
Description
Proficiency
Salesforce.com ADM 201 Certification
Salesforce.com Apex 3-Competent
Salesforce.com DEV 401 Certification
Salesforce.com Test Class
Salesforce.com Visual Force
--None--
1-Trained
2-Novice
3-Competent
4-Proficient
5-Expert
Page 1

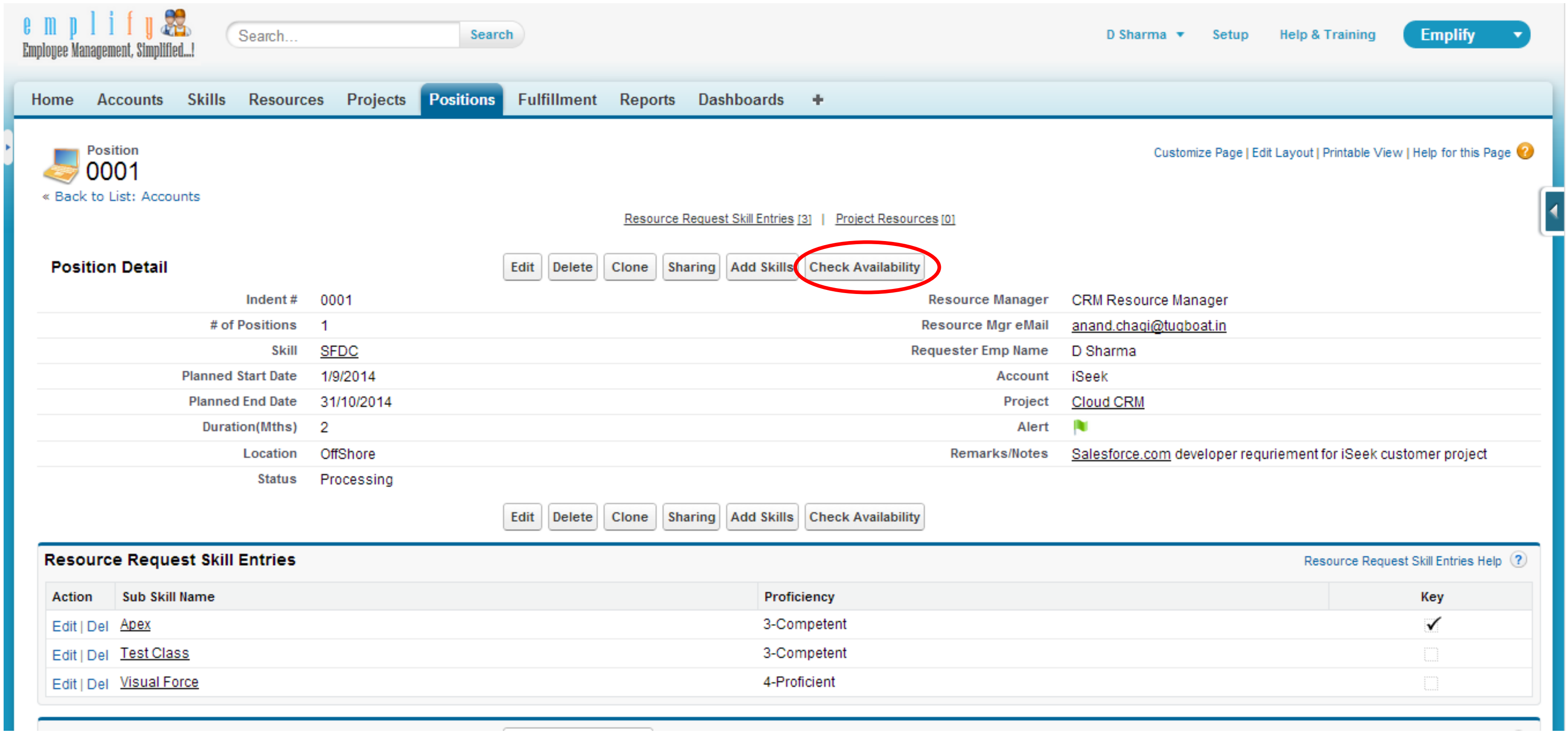
GO TO FULFILLMENT TAB AND CLICK ON INDENT # TO REVIEW AVAILABLE EMPLOYEES

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



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

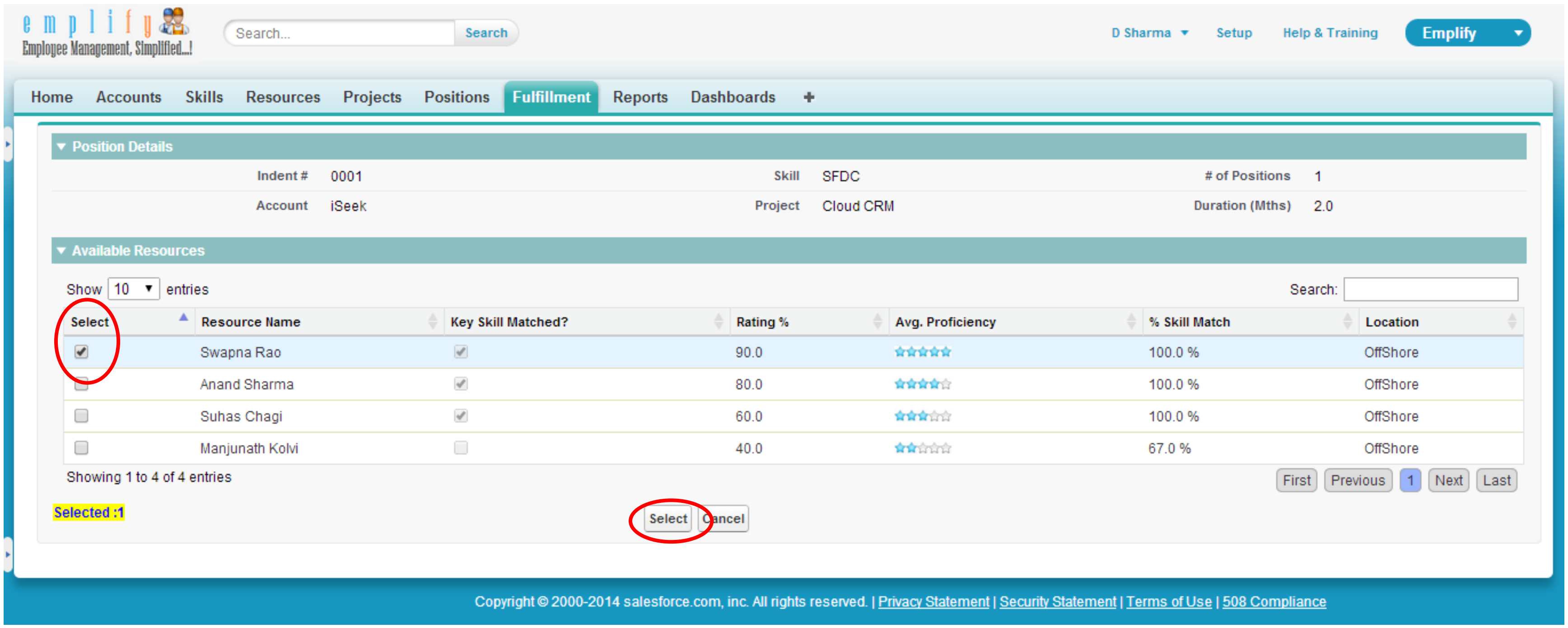
(Click Check Availability button as shown below)



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

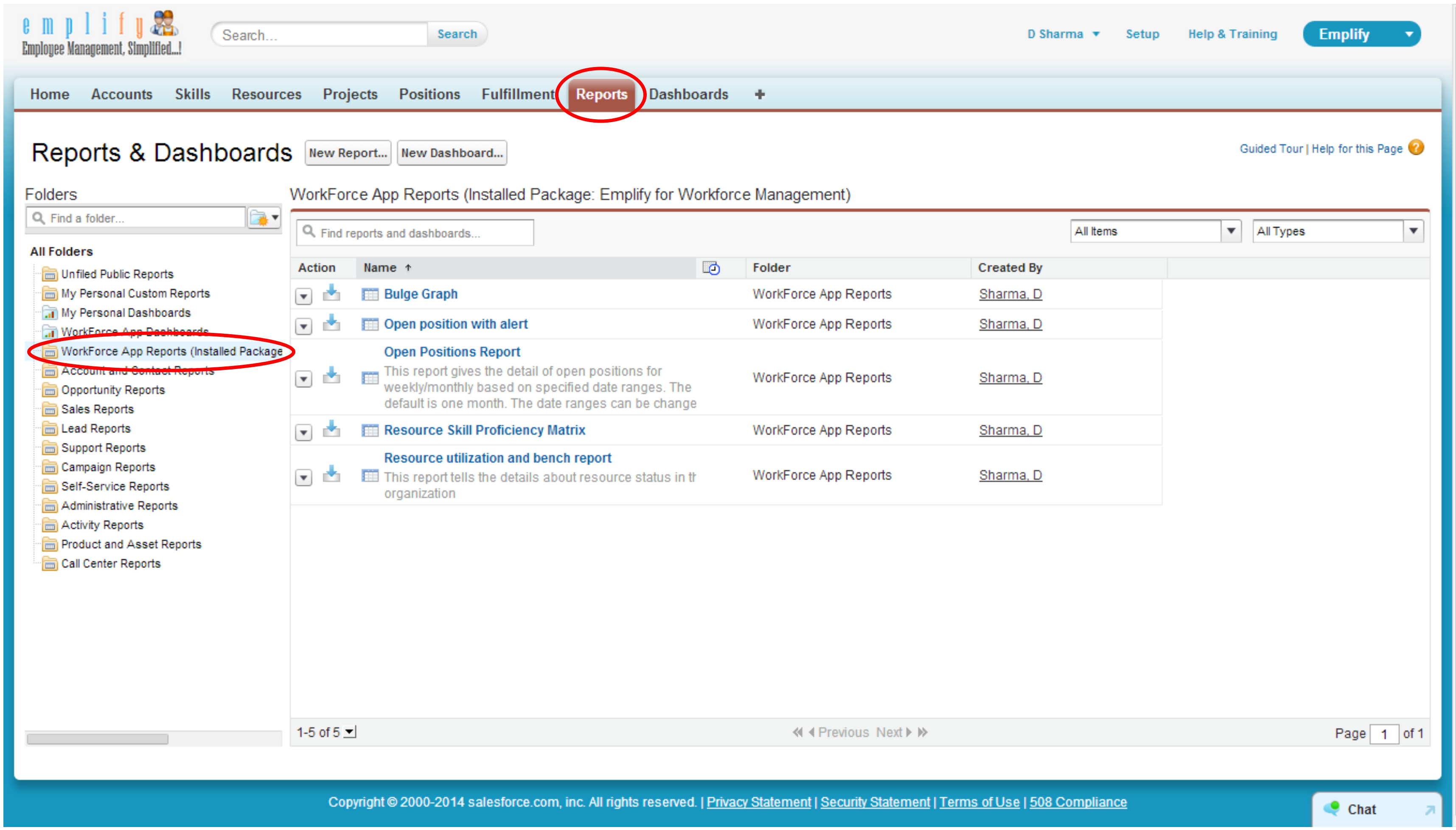
(Select best fit candidate & Click Select to associate the resource to the Project as shown below)

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.



BASIC REPORTING PROVIDED UNDER REPORTS

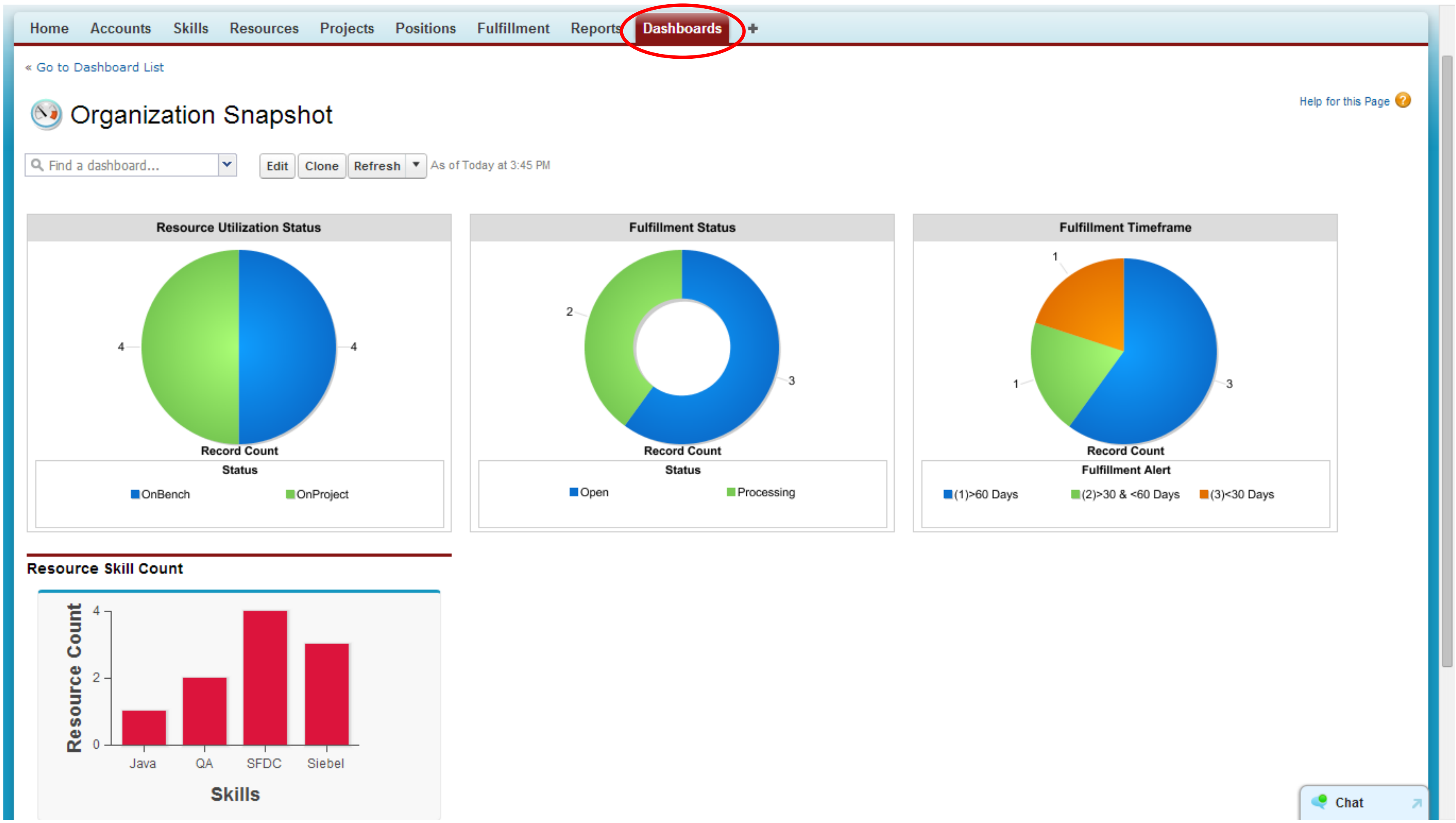
(Go to Reports tab as shown below to run required reports)



DASHBOARD PROVIDES ORGANIZATION-WIDE STATUS SNAPSHOT

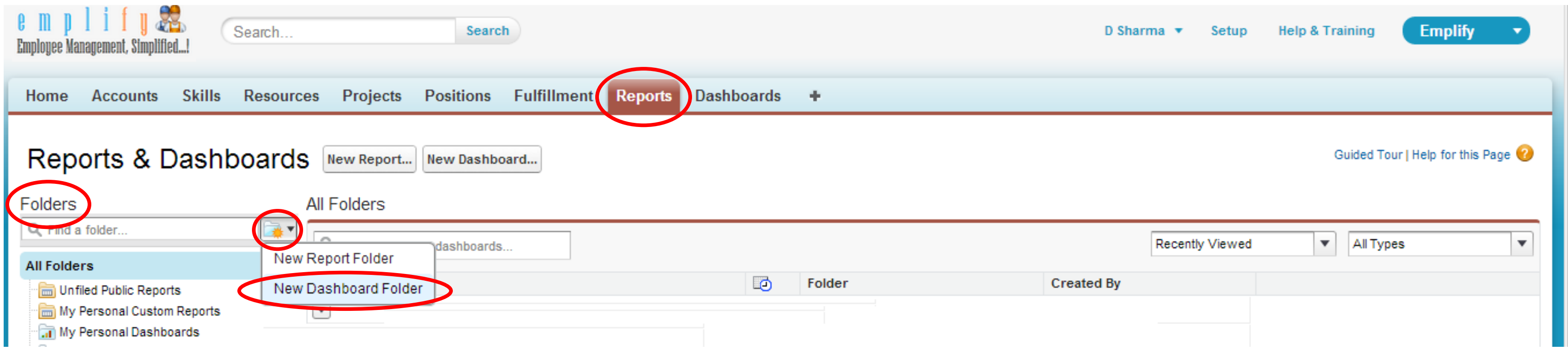
(Go to Dashboard tab as shown below to get quick data snapshot)

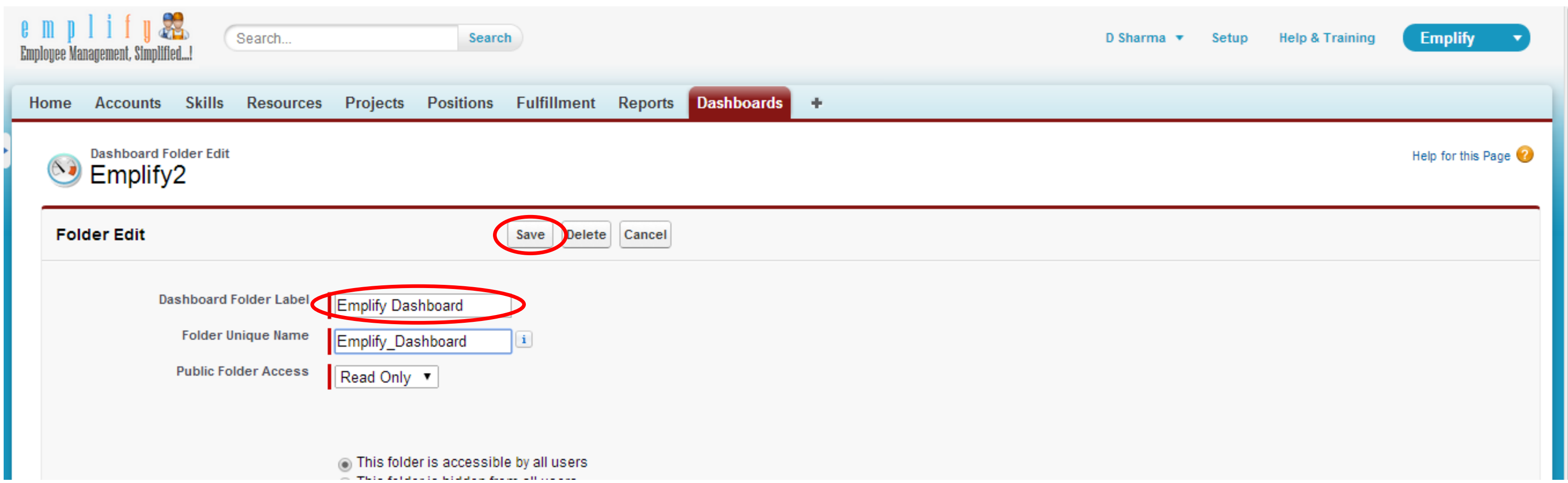
Note: Separate setup required to view below snapshots; please refer Dashboard setup details provided in next pages.



Create New Dashboard Folder

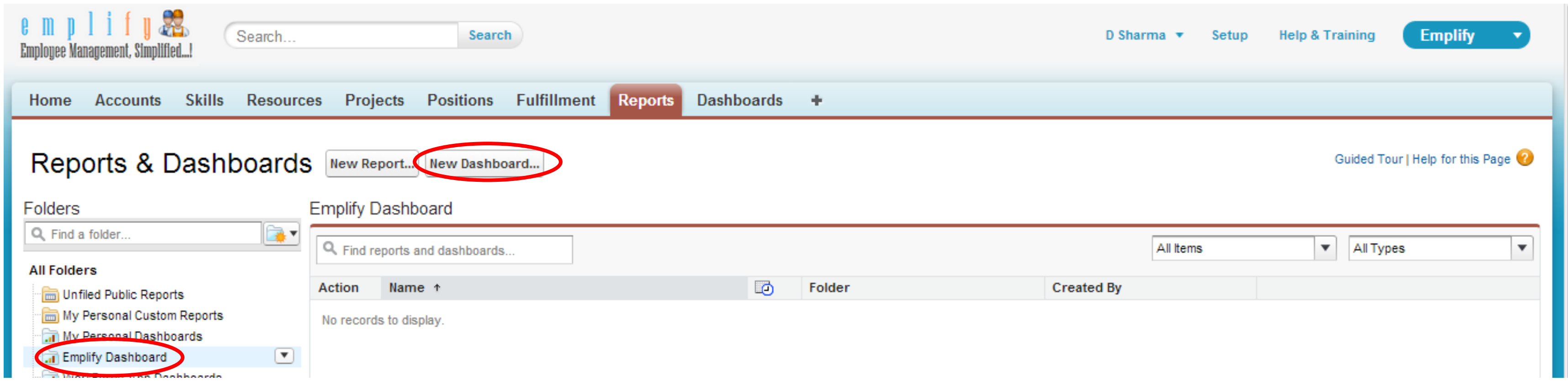
(Click Reports → New Dashboard Folder and input unique Folder name and save as shown below)





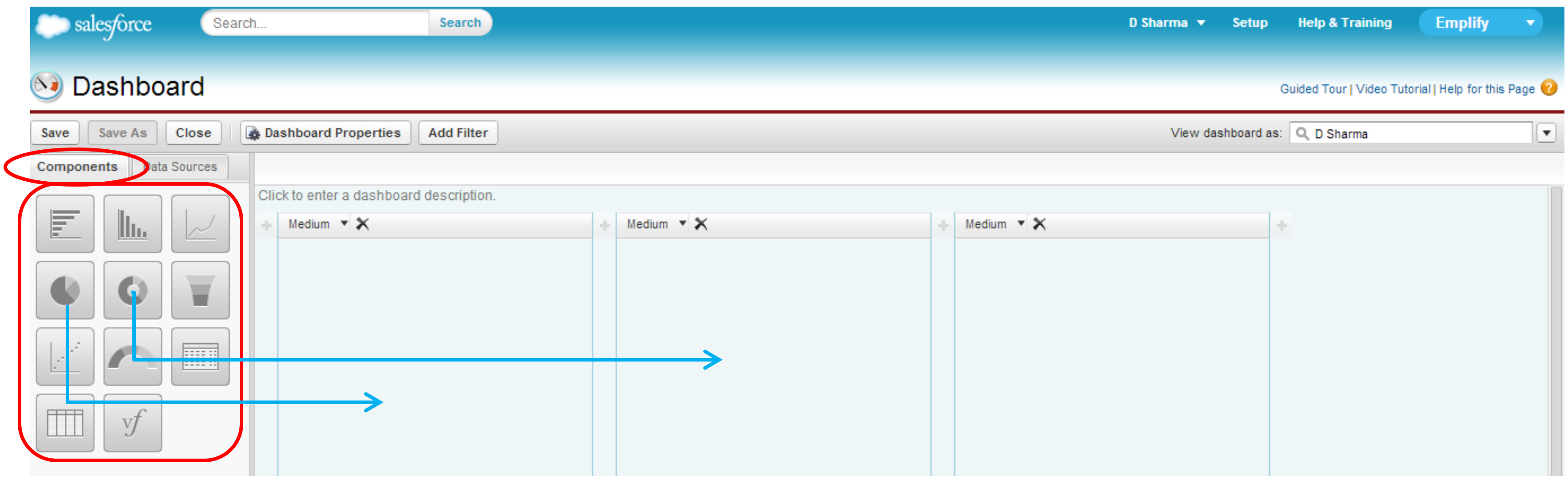
CREATE NEW DASHBOARD

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

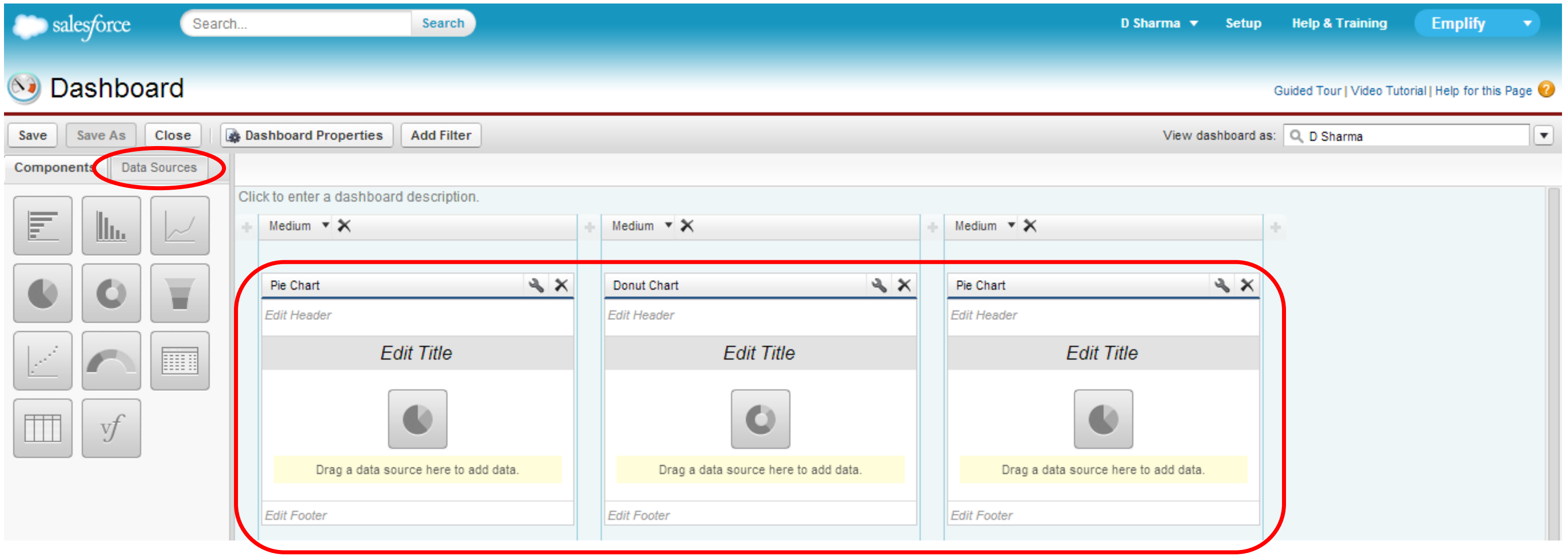


DESIGN NEW DASHBOARD

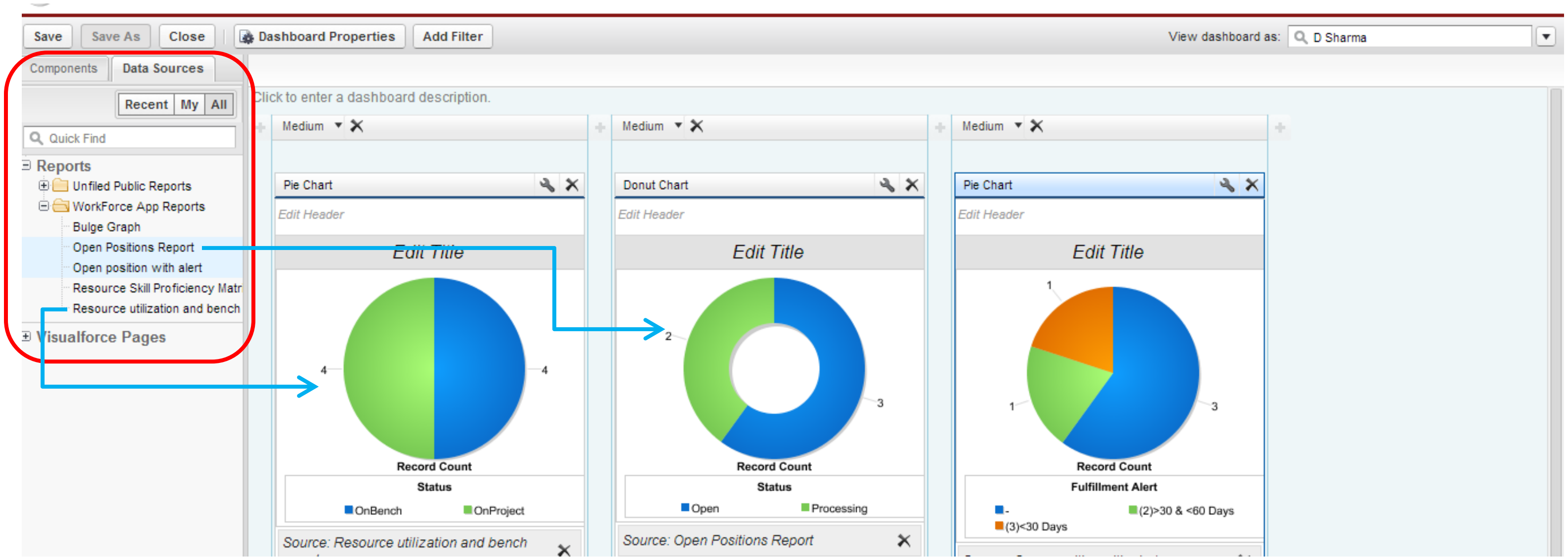
(Click ‘Components’ button and drag required component into the placeholder to design new Dashboard as shown below)



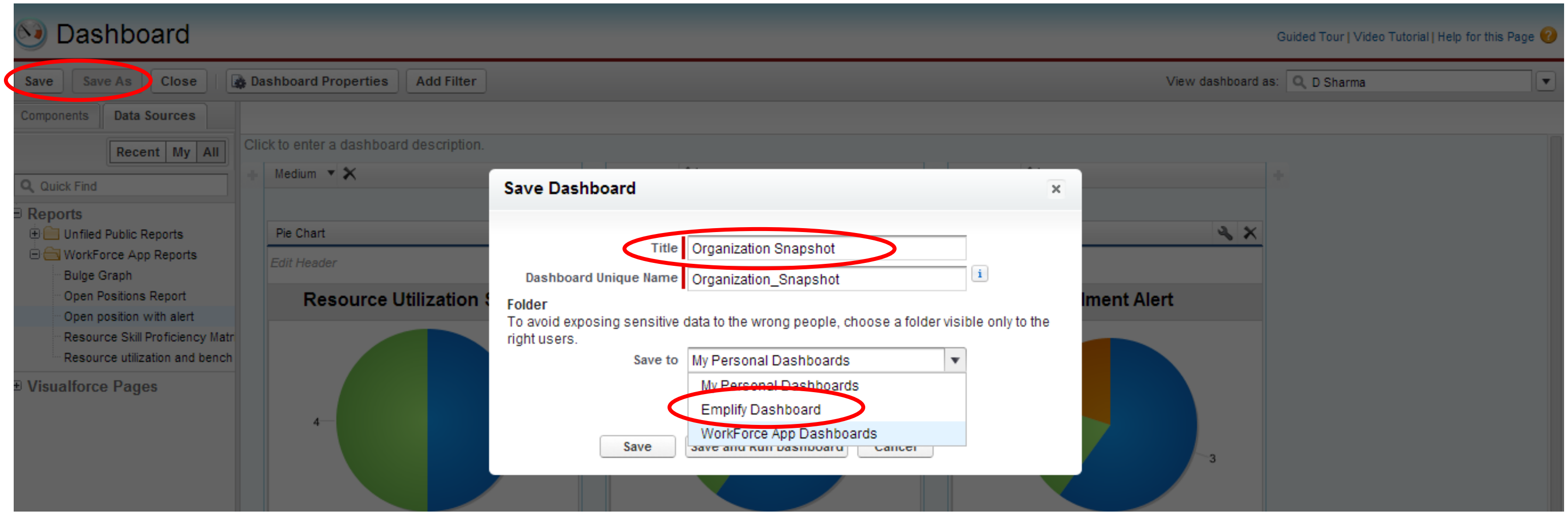
(Once required components pulled into the placeholder, Click Data Sources tab as shown below)



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



(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)