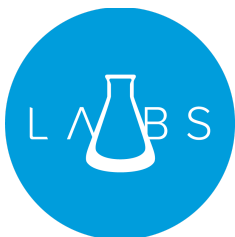




Crisis Response App

Setup Guide



Last updated: June 24, 2020

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Introducing the Crisis Response App

Use the Crisis Response App to respond to a crisis in your community –whether that’s a pandemic, natural disaster, or any other significant organizational event– while maintaining business continuity. Because this application is deployed into existing Salesforce orgs, you can join your business-as-usual company data with crisis data to understand the big picture and mitigate workforce and business impact. Here are some examples of what you can do:

- **Address Workforce and Location Impact** – The Crisis Response App provides you with a centralized place to manage the business impact of a crisis. Keep track of impacted employees (such as employees who are sick or displaced) and the crisis’ impact on your locations, services, and operations (such as closure of or damage to an office). Quickly address the challenges your employees are facing. Using pre-built workflows to follow up with employees, ensure efficient responses and continued wellbeing. Plus, manage office closures, cleaning schedules, and repairs.
- **Respond to Employee Needs** – Through outreach and assistance programs, support your employees’ requests and ensure their health and safety. Whether it’s a request to travel or a request for new work-from-home equipment, program enrollment means employees can easily make their needs clear.
- **Keep Employees Up to Date** – Quickly deploy a crisis-centric Employee Portal to create a central hub for your employees to access company news and up-to-date local and global information. Plus, employees can leverage the portal to update their impact and status, as well as submit requests for assistance programs.
- **Ensure Business Continuity** – To keep the business running after the crisis, you need to develop and activate continuity plans. Reports on the overall organizational impact of the crisis (such as number of employees unable to work, number of locations closed, revenue impact, and travel metrics). Make informed decisions about the future of their business operations.

Get Started with the Crisis Response App

How should I use this app?

Here’s a brief description of the tabs available to you:

Crises is where you go to see everything about a crisis, rolled up into a single view. See how many people and locations are impacted, alongside the available employee assistance programs. Collaborate around how to best react to the crisis.

People are your employees, and anyone else you want to keep safe during a crisis.

Impact to People is where you manage impacted people in your org. Someone could be impacted if they're sick, displaced, or can't work for another reason. These records are populated from the employee portal to let you know if someone is impacted or marked safe during a crisis.

Employee Requests are requests made through the employee portal. These include travel requests, requests for job-related equipment, and remote working requests.

Employee Assistance Programs are programs you can enroll employees in to help them stay healthy or continue working during a crisis. Use this space to collaborate on programs and see how many employees you've helped.

Locations are offices, retail locations, warehouses, and other locations you need to track during a crisis. Make plans for closing or re-opening an office, cleaning, or maintenance work. You can communicate location updates by selecting "Display on Home Page" when you create a location. That location's status appears on the Crisis Response home page and on the employee portal.

Company News is where you go to publish news related to your crisis. Once marked "Public," news will show up on the Crisis Response home page and on the employee portal.

Check-In tab is where you can scan photo IDs for fast check-ins to locations, such as offices or distribution centers. This tab is meant to be used in the Salesforce Mobile App. This tab can be accessed through the "Location Check-In" app.

Object Model

This app includes the following custom objects:

Crisis

Represents a crisis that you're responding to. The crisis record includes information such as the number of impacted people and how they're impacted, impacted locations, assistance programs, and company news about the crisis.

Impact

The *type* of impact that a person is experiencing. For example, someone could be exposed, self-quarantined, or feeling ill during a pandemic. During a hurricane, someone could be displaced, injured, or marked safe.

Personal Impact

An individual instance of a person's impact. This object ties a person to a type of impact and allows you to track the status of their impact.

People

The individual people that you care about and need to follow up with during a crisis. See how they've been impacted, what locations they're associated with, what assistance programs they've enrolled in, and what employee requests they've made.

Location

The locations – such as buildings, construction sites, or offices– you're managing during a crisis. Track location changes and closures, the people associated with a location, and work that needs to be done at a location –such as cleanings or repairs. If you select the **Visible on Home Page** checkbox for a location, its status will appear on the home page and the employee portal in the Office Status Lightning component.

Location Work

Work that is pending or has been completed for a location. Maintain locations during a crisis by scheduling and tracking cleanings, repairs, and more.

Person Location

Associates a person with a location, showing that they've either visited the location or they frequently work at the location.

Location Crisis Issue

Associates a location's impact with a crisis. This shows whether a building was damaged, closed, or otherwise impacted during a crisis.

Employee Requests

Requests made by employees using the employee portal. These include travel requests or approvals, job-related item requests (such as technology), and remote working requests. Use the Crisis Response App to approve requests, assign the work, and track statuses.

Approvers

Determines which user populates the Approver field on Employee Request records. For example, if Cindy is assigned the Executive Approver role on the Approver object, her name will automatically populate any time the **Executive Approval Required** checkbox is selected on an employee request. If Jason is marked as the Travel Requests approver, his name will automatically populate the Approver field for all travel requests.

Assistance Programs

Programs you can offer to your employees to help them through a crisis. For example, you could offer daycare or a work-from-home stipend. Use this object to track how many employees you've helped, which employees have enrolled, and your assistance program budget.

Assistance

An individual instance of a person using an employee assistance program. You can see how you have helped them and how much it cost.

Crisis Assistance Program

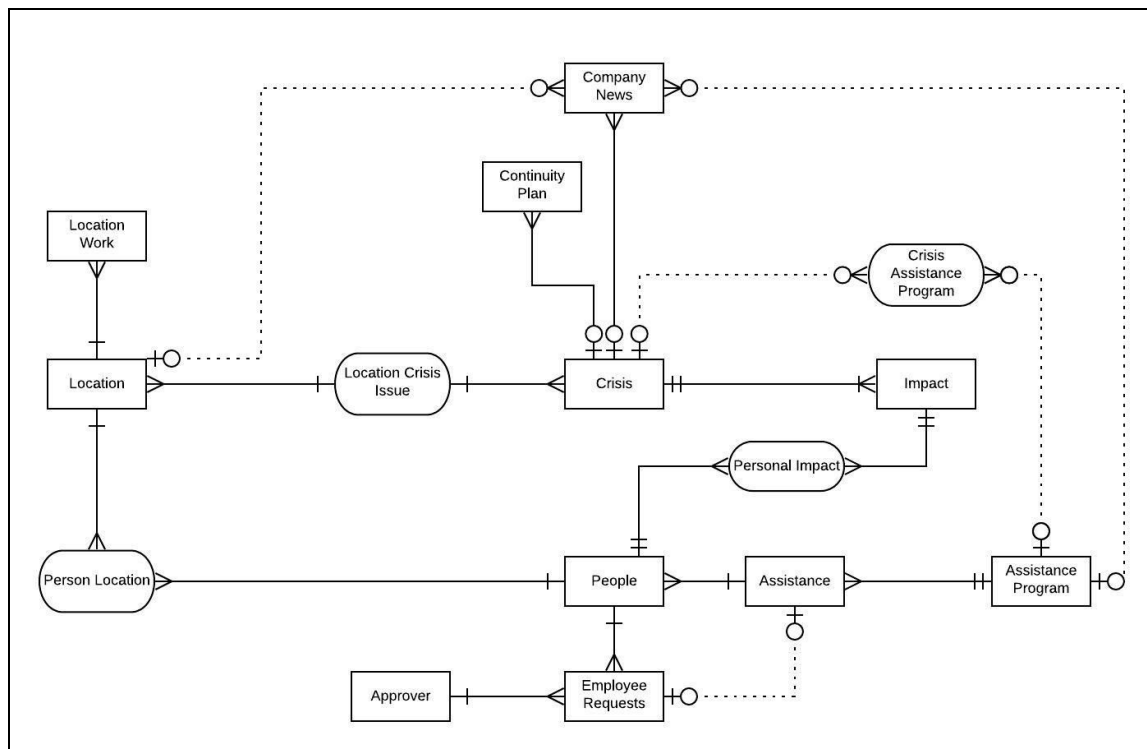
Displays a list of crises the assistance program is supporting.

Company News

Crisis-related news that's published on the home page and the employee portal. Create a company news record and select the **Public** checkbox to display it on the home page and the portal. Note that if you include images, you should upload them using the button in the rich text editor. Don't copy and paste images –they won't load correctly in the portal.

Continuity Plans

Provides a link to a continuity plan document that you can quickly access during a crisis.



How should I install this app?

There are two ways to install the Crisis Response Application: through the AppExchange as a [managed package](#), or through our [GitHub repository](#).

To install the app from the AppExchange as a managed package, simply click the **Get It Now** button on the AppExchange listing. This installs a managed package into your organization automatically, after you follow a few prompts. If you install the managed package, you can upgrade to newer versions of the application. However, you lack some customization flexibility, such as modifying processes and Lightning components.

As an alternative, you can install our open-sourced application from GitHub. To install the app using this method, refer to the [Salesforce DX Developer Guide for pushing source code to a scratch org](#).

Prerequisites

Before you begin, make sure that:

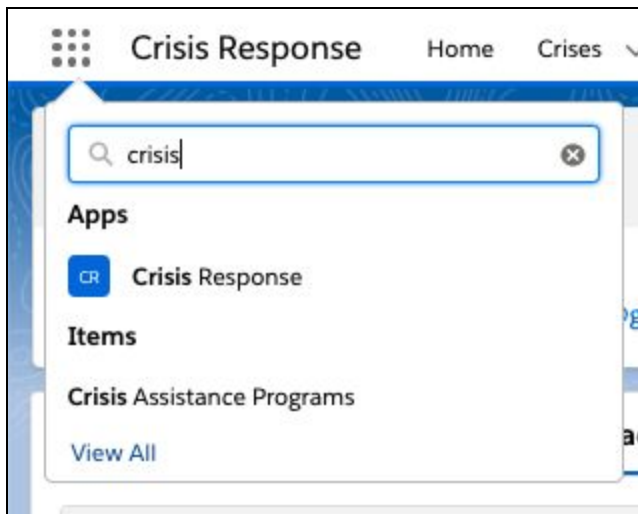
- Users have the System Permission “Run Flows”.
- Lightning Runtime is enabled. You’ll need it to run Crisis Response flows in your org. For more information, see [here](#).
- MyDomain is enabled. You’ll need it to use Crisis Response Lightning Components in your org. For more information, see [here](#).
- Chatter is enabled. You’ll need it to install the app, to modify records using quick actions, and to collaborate with your colleagues. Chatter is enabled by default in most orgs.
- Content Deliveries are enabled. To enable Content Deliveries, follow these steps:
 1. From Setup, enter [content deliveries and public links](#) in the Quick Find box, and select **Content Deliveries and Public Links**.
 2. Click **Edit**, and then select [Content Deliveries feature can be enabled for users](#)
 3. Click **Save**.

To get the most out of this app, we recommend using Lightning Experience.

If you’re working with a public health organization, the [Salesforce Care package for healthcare](#) may be a better fit for you. Similarly, there are solutions to support [nonprofits, small businesses, and more](#).

Accessing the Crisis Response App

Users can access the Crisis Response App by navigating to the App Launcher and selecting **Crisis Response**.



User Permissions

To use the Crisis Response App, users need access to a specific app, objects, tabs, and other functionality. To get a user started with the application, assign them one of the following permission sets.

- **Crisis Response User** - Assign this to anyone managing employee and location impact. This gives them full access to the application, minus the ability to set approvers and publish news.
- **Crisis App Approver** - Assign this to users who will be approving requests. It allows users to modify the Approvers object, which sets default approvers for Employee Requests.
- **Crisis Response Guest User** - Assign this to guest users. It enables them to access a public employee portal. This is documented in more detail in the Employee Portal section.
- **Crisis Response Employee** - Assign this to non-managerial users, such as sales or service users. It allows them to access public features without navigating to an external employee portal. They can see news, location statuses, and the employee portal Lightning page.
- **Crisis Response News Publisher** - Assign this to users who need to publish news using the Company News object.
- **Crisis Response - Einstein Playground** - Assign this to users who need to manage the Location Check-In Administrator functionality.
- **Crisis Response - IDReader** - Assign this to users who will need to check employees and guests into buildings using the Photo ID Reader (using Einstein OCR).

To assign a permission set,

1. From Setup, enter **Users** in the Quick Find box, then select **Users**.
2. Select a user.
3. In the Permission Set Assignments related list, click **Edit Assignments**.
4. To assign a permission set, select it under Available Permission Sets and click **Add**.
To remove a permission set assignment, select it under Enabled Permission Sets and click **Remove**.
5. Click **Save**.

User Row-Level Security

By default, all users who have access to view an object will have access to view all records associated with that object. For example, anyone who can see the People tab can see all records within that tab.

You can change this setting. For example, you may want to give managers access to the employees that report to them so that they can see how their employees are impacted, but not all employees.

To change this, refer to the [Salesforce Security Guide](#) to change your [Org-Wide Sharing Defaults](#) to the Private setting.

Set Up an Employee Portal

The Crisis Response Application allows you to set up a portal for unauthenticated employees. They can use this portal to submit requests, report whether they've been impacted by the crisis, and view company news.

Enable Communities

Salesforce Communities are a great way to share information and collaborate with external users through a website. You don't need a Salesforce Community license to enable a public Salesforce community.

To enable communities, follow these steps:

NOTE: Already used communities in your Salesforce org? You can skip steps 1–3.

1. Navigate to **Setup > Feature Settings > Communities > Communities Settings**.
2. Click **Enable Communities**.
3. Create a domain name for your community's URL, and click **Save**. The domain name is typically the name of your company, or something similar to your company's web page URL.

SETUP
Communities Settings

Communities are spaces for employees, customers and partners to collaborate on best practices and business processes. [Learn more.](#)

To get started with communities, you must first enable it and select a domain.

[Save](#)

Enable communities ! Required Information

Important:
Once you enable communities in your org, you must still create, configure, customize, and then activate a community before it's live and available to users.
After you enable communities, you can assign the View Global Header permission to internal users who need access to the community. The global header allows users to easily switch between their internal org and any community they're a member of. [Learn more.](#)

☒ Enable communities

Select a domain name

Important: The domain name will be used in all of your communities and can't be changed after you save it

Sample Domain Name
MyCompany.force.com

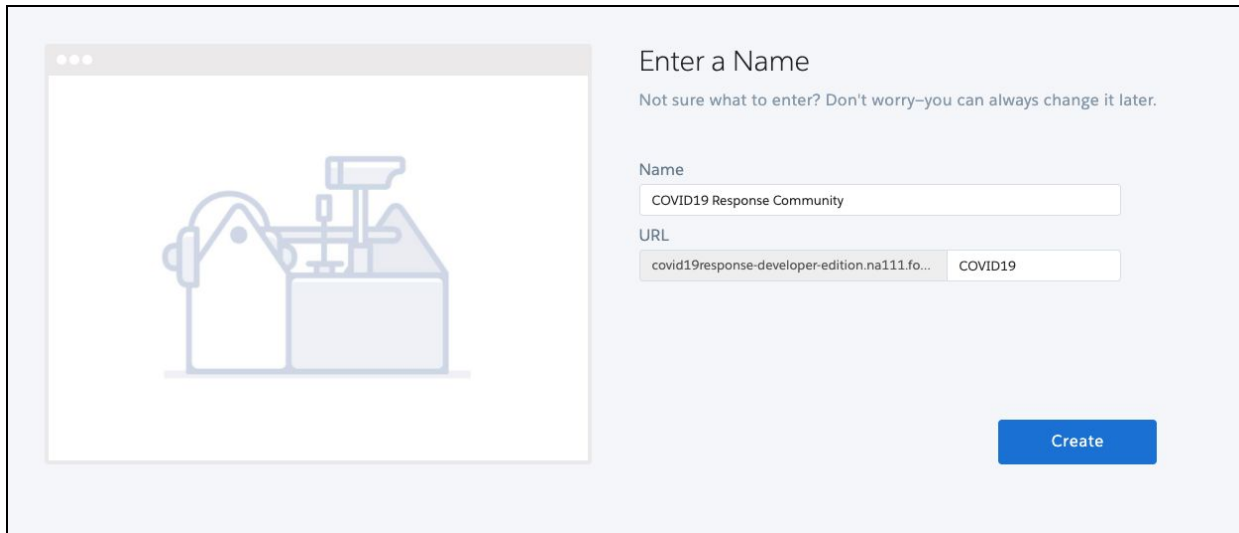
Sample Community URLs

- MyCompany.force.com/customers
- MyCompany.force.com/developers
- MyCompany.force.com/partners

Domain name ! COVID19Response -developer-edition.na111.force.com [Check Availability](#)

[Save](#)

4. Navigate to Setup.
5. Under Platform Tools, select **Feature Settings > Communities > All Communities**.
6. Select **New Community**.
7. Scroll down and select the **Build your own** community template.
8. Follow the prompts and click **Get Started**.
9. Create a name for your community. You could use the name of the crisis you're currently supporting or a generic name you can use for future crises.
10. Click **Create**.



Enter a Name

Not sure what to enter? Don't worry—you can always change it later.

Name

COVID19 Response Community

URL

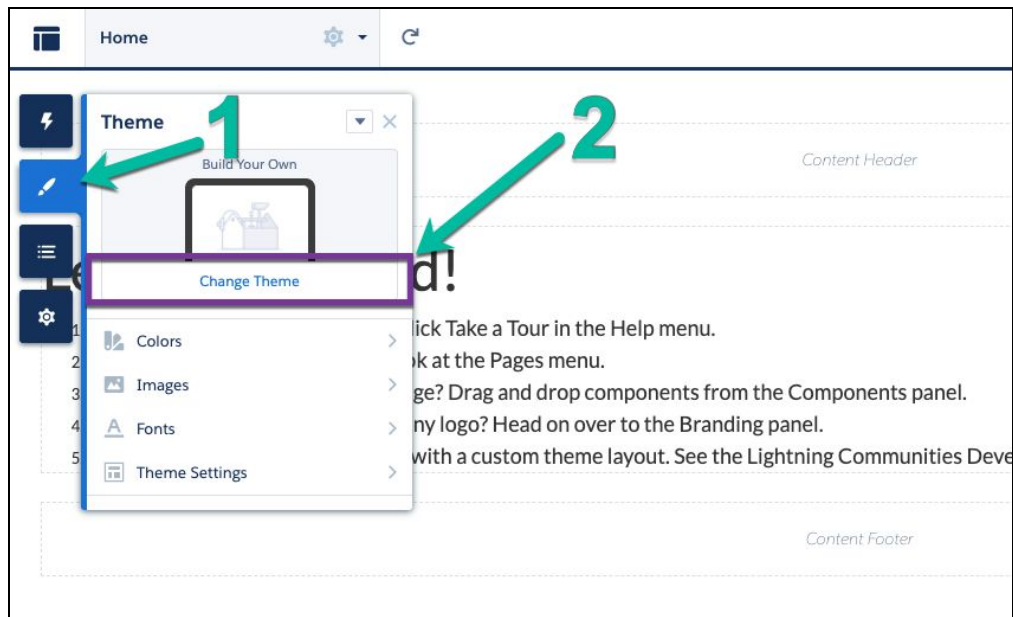
covid19response-developer-edition.na111.fo... COVID19

Create

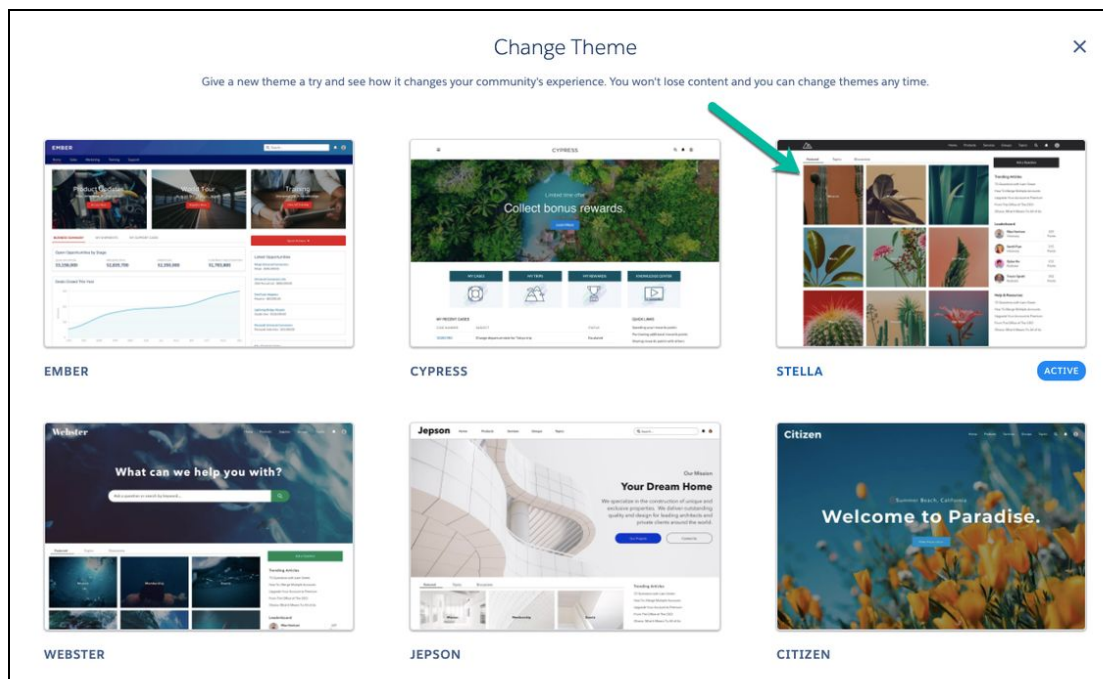
Brand Your Community

Salesforce Communities give you the ability to easily brand your community with your company's logo and colors. Follow along to brand your community.

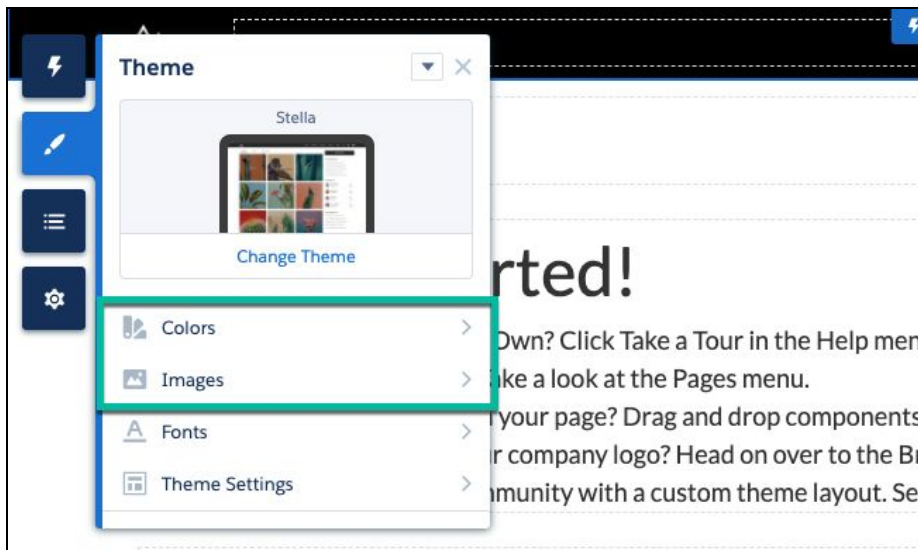
1. Navigate to the community workspace for the community you just created.
 - a. Select **Setup > Feature Settings > Communities > All Communities**.
 - b. Find the community you just created and select **Workspaces**.
2. This is your community workspace. Click on the first tile, called **Builder**.
3. On the left side of your builder screen, select the second box from the top, called **Theme**, and select **Change Theme**.



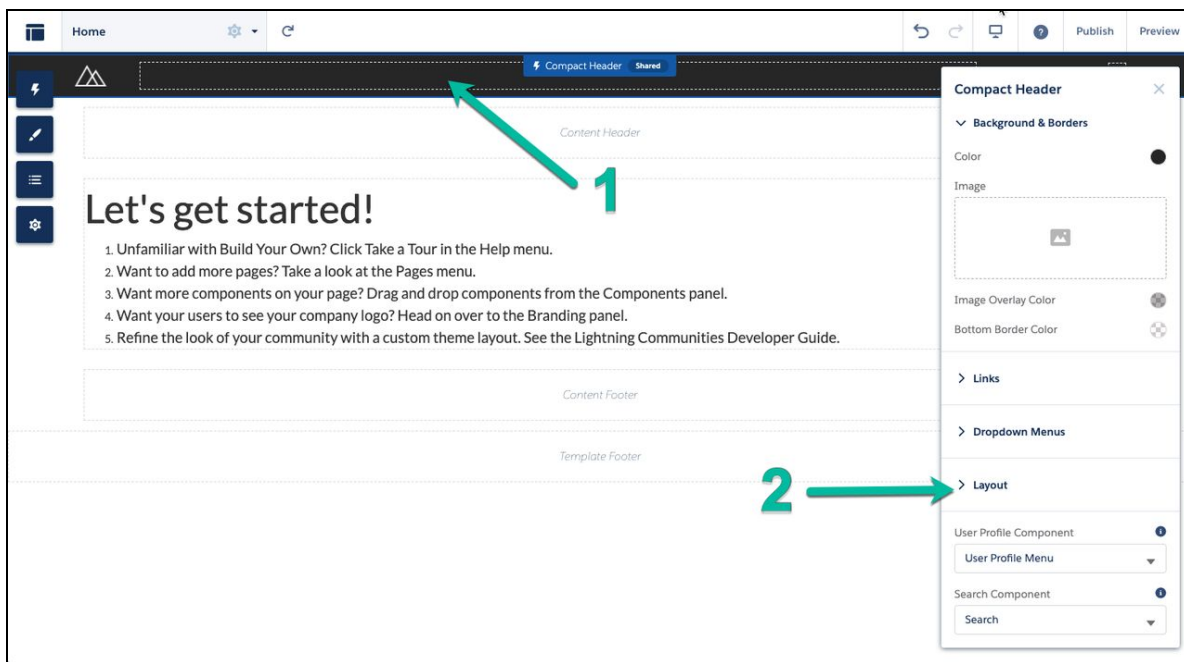
4. Select the **Stella** theme, then click **Activate Theme**.



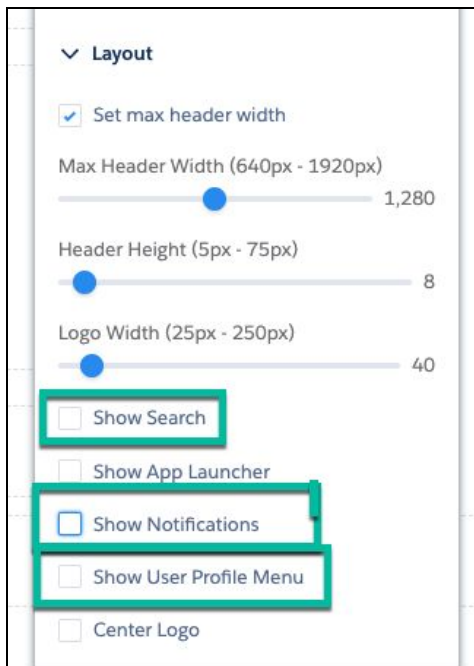
5. Select **Theme** again.
6. Select **Colors** to choose your preferred company colors.
7. Select **Images** > **Company Logo** to upload your company's logo.



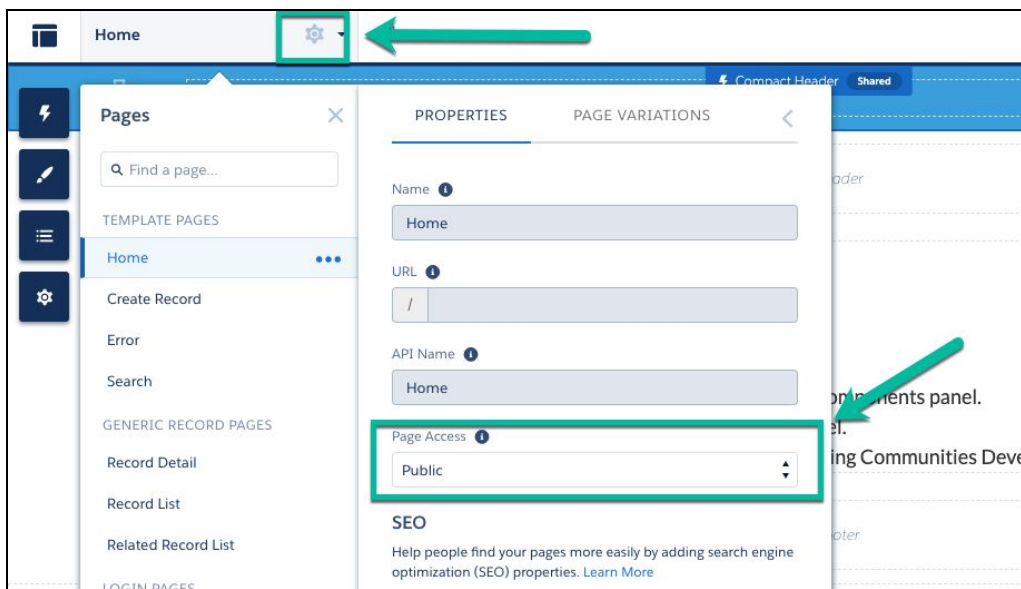
8. Select the header at the top of the screen and select **Layout** to expand it.



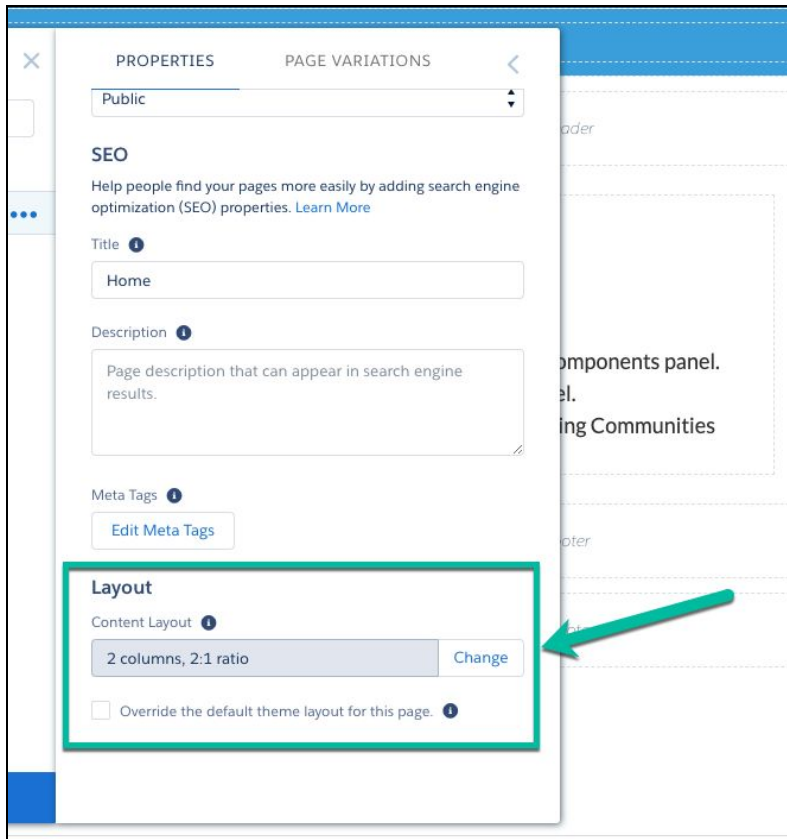
9. Deselect the **Show Search**, **Show Notifications**, and **Show User Profile Menu** checkboxes.



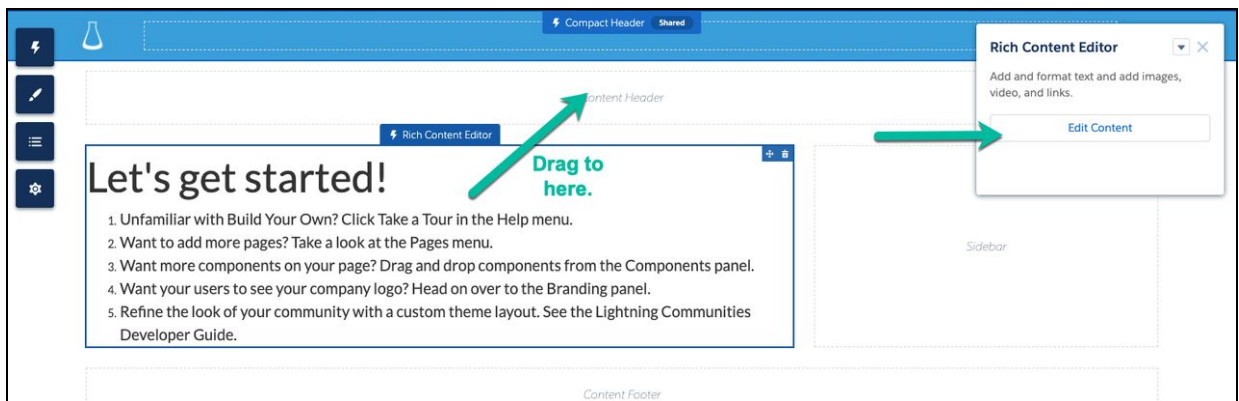
10. Click on the cog wheel at the top near Home. Select the **Page Access** dropdown menu and select **Public**.



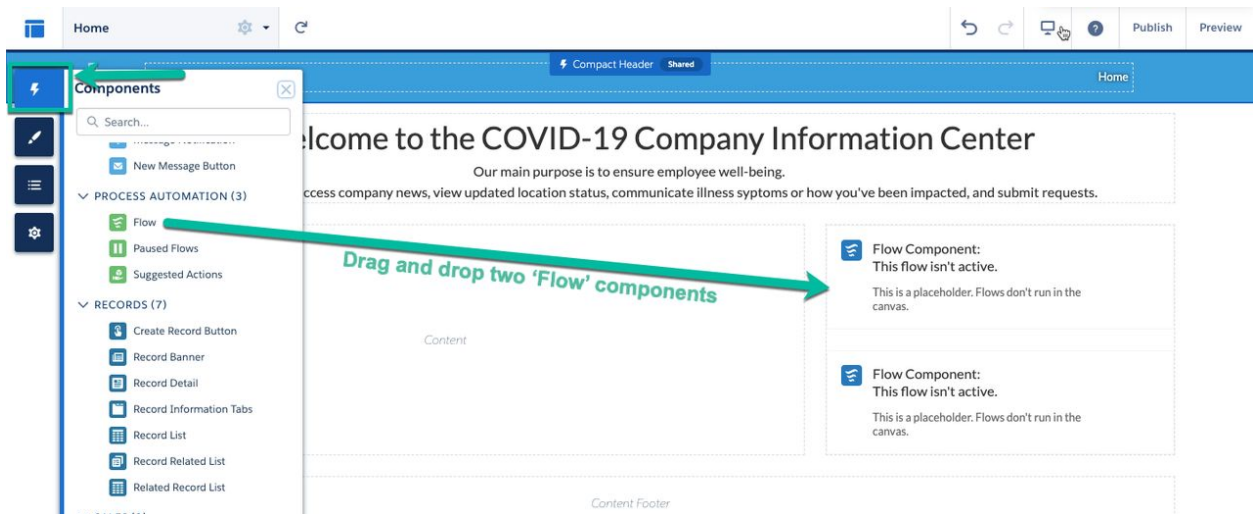
11. Scroll down until you see the Layout section. Select **Change > 2 Columns, 2:1 ratio > Change**.



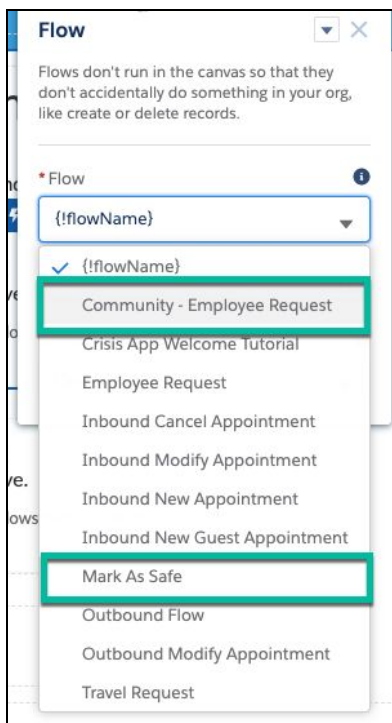
12. Drag and drop the Rich Content Block that says “Let’s get started!” to the header. Then click **Edit Content**. Enter your own content to let your users know how to use the portal.



13. Navigate to the Components list at the top left of the screen. Enter **Flow** in the search bar and select the **Flow** component. Drag and drop two Flow components onto the canvas.

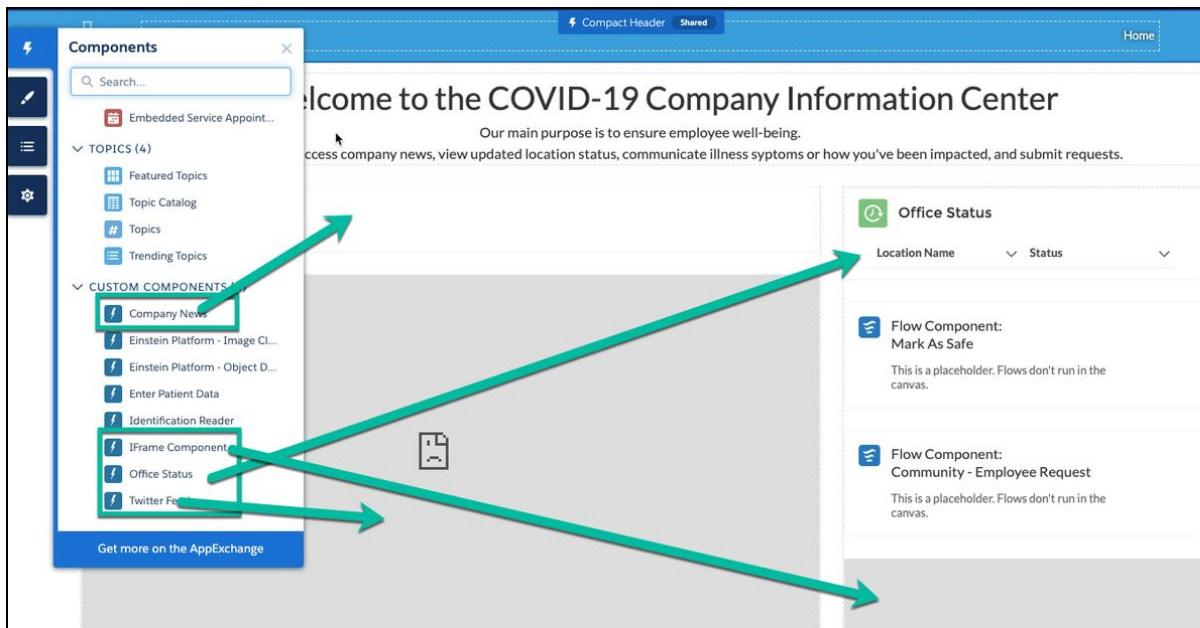


14. Click on the first Flow component. Select the **Flow** dropdown, then select **Mark As Safe**. Alternatively, if you plan on using this app for the COVID-19 crisis, you can instead select **COVID-19 Survey**.

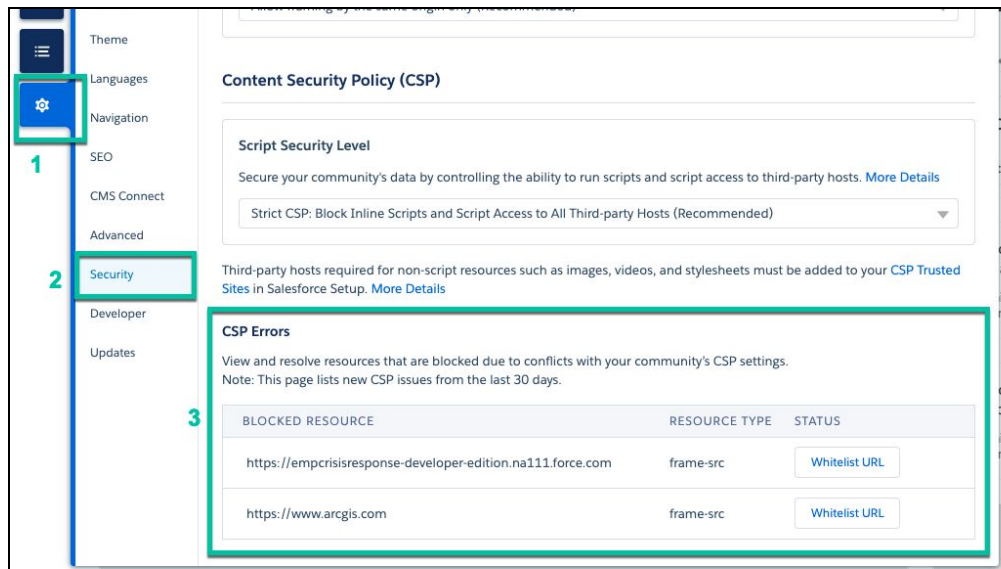


15. Click on the second Flow component. Select the **Flow** dropdown, then select **Community - Employee Request**.
16. Add any of the following four components onto the screen. You don't need all of them, so you can choose the ones you want. If you get any error messages, click **OK**.

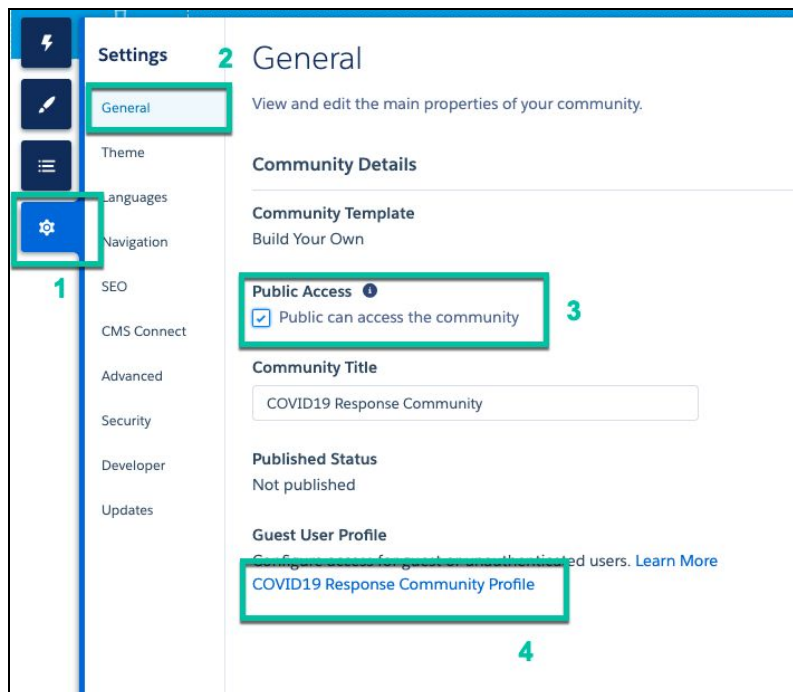
- a. **Company News:** Share the latest updates from your company, as published in the Company News tab in your Salesforce org.
- b. **IFrame Component (Optional):** When you add the IFrame Component, you can input a website URL. This URL displays within the IFrame for your users. Some examples are the COVID-19 Johns Hopkins dashboard (<https://www.arcgis.com/apps/opsdashboard/index.html#/85320e2ea5424dfaaa75ae62e5c06e61>), a hurricane tracker, or another webpage related to an ongoing crisis.
- c. **Office Status:** Keep employees up-to-date on which locations are closed or operating during limited hours. We pull this data from the Locations tab in your Salesforce org. It only shows locations where the **Show on the home page** field is selected.
- d. **Twitter Feed:** When you add the Twitter Feed component, you can input a Twitter handle ID. That Twitter feed appears on the community, so you can provide live updates to your employees. Some examples are the CDC (Center for Disease Control), the WHO (World Health Organization), a local city account, or a weather account.



17. Make sure that everything is to your liking. This is how your community will look when you publish it. **You might notice that some of your components don't show up yet, or you may even get error messages.** Don't worry– we have to make some changes to security policies first.
18. Navigate to the Settings tab on the left side of your screen. Find the Security section and scroll down. If there are any CSP Errors, review them and click **Whitelist URL** to access the URL inside of your community.



19. Scroll up to the General tab within settings. Select the **Public can access the community** checkbox to make your portal publicly available.
20. Under Guest User Profile, select the name of your guest user profile. This gives access to unauthenticated users who visit the community.



21. Optionally, you can restrict the IP addresses that can view your portal. For example, you may want to require your users to log in to a VPN to access the public portal. If you want to do

this, hover over **Login IP Ranges** and click **New**. You may need to get the proper IP range from your IT group.

Profile
COVID19 Response Community Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(15\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled Custom Metadata Type Access \(0\)](#) |

Login IP Ranges [New](#) [Login IP Ranges Help ?](#)

No login IP ranges specified. Users from any IP address are allowed to log in.

User License: Guest Custom Profile: ☒

22. Click **Edit** on the user profile.

23. Find the **Run Flows** permission and select the checkbox.

General User Permissions

Access Activities ☐

Allow Access to Customized Actions ☐

Edit Tasks ☐

Knowledge One ☐

Mass Email ☐

Run Flows ☒

Send Email ☐

Show Custom Sidebar On All Pages ☐

Standard Object Permissions

24. Click **Save**

25. Click **View Users**

Profile
COVID19 Response Community Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(15\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled Custom Setting Definitions Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Custom Permissions \(0\)](#)

Profile Detail [Edit](#) [View Users](#)

Name: COVID19 Response Community Profile

User License: Guest Custom Profile: ☒

26. Click on the full name of your guest user.

COVID19 Response Community Profile

On this page you can create, view, and manage users.

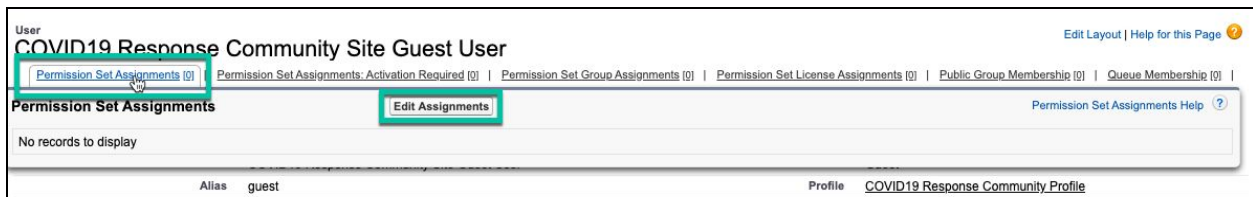
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | [All](#)

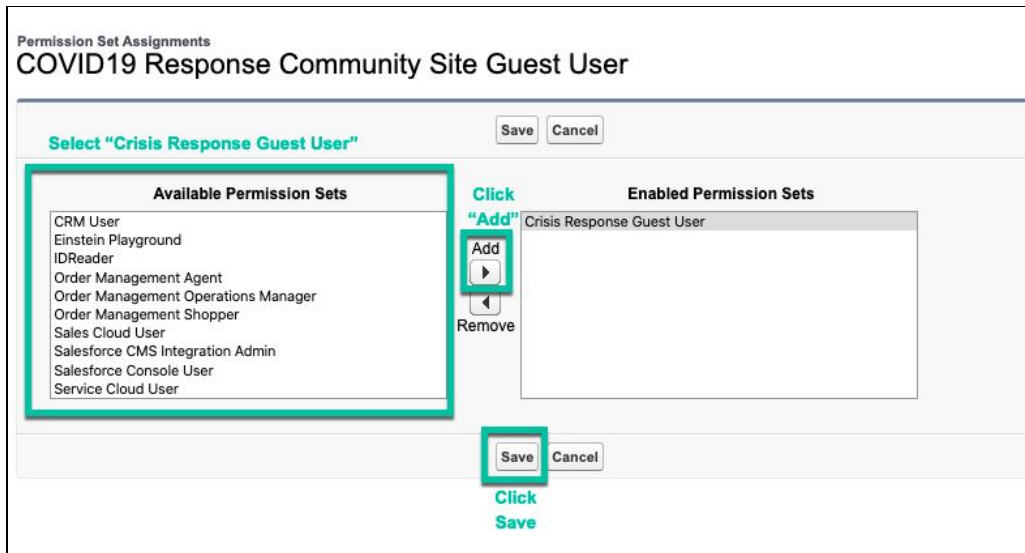
Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
Edit	Site Guest User, COVID19 Response Community	guest	covid19_response_community@covid19response-developer-edition.na111.force.com			☒	COVID19 Response Community Profile	

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | [All](#)

27. Hover your mouse over **Permission Set Assignments** and click **Edit Assignments**.

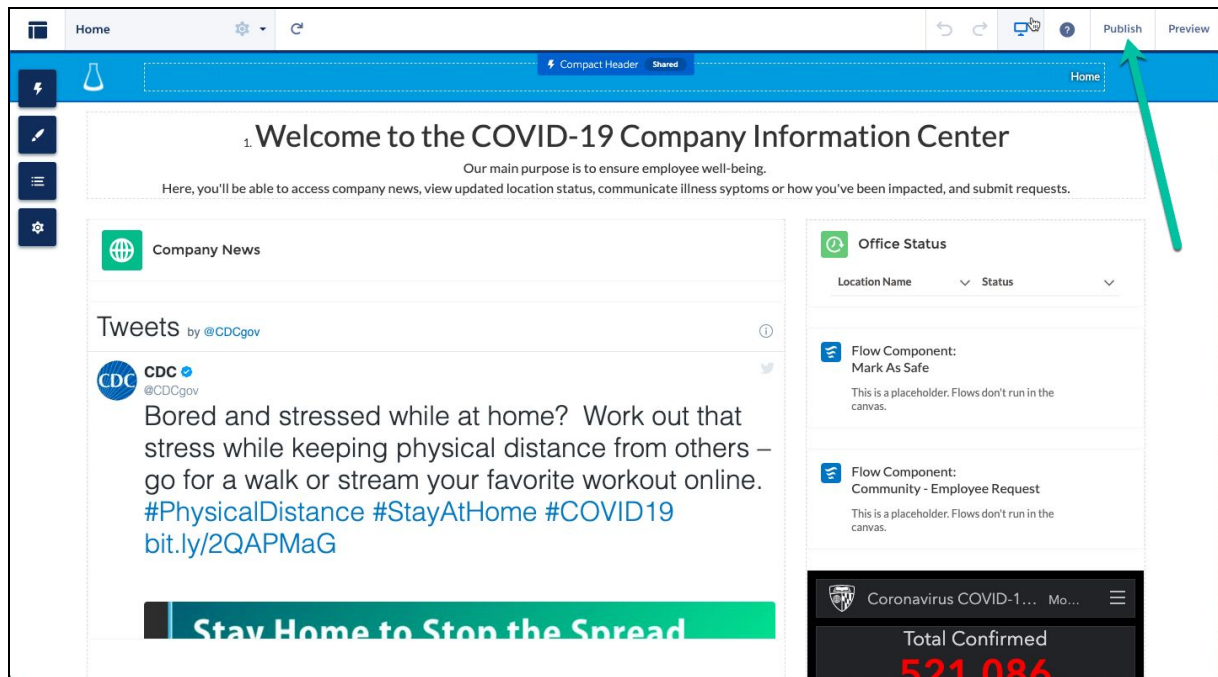


28. Add the **Crisis Response Guest User** permission set to your guest user and click **Save**.

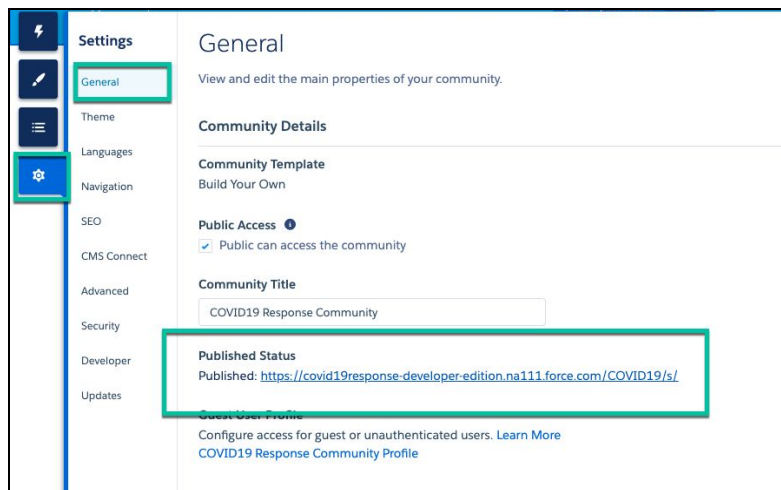


29. Navigate to the Experience Builder browser tab by selecting **Setup > Feature Settings > Communities > All Communities**, then clicking **Builder** next to your community.

30. Click **Publish** near the top right of your community builder. Follow the prompts by clicking **Publish** again, then clicking **Got It!**



31. Find the URL for your portal by navigating to the **Settings** tab on the left side of your screen. Share this URL with your employees to receive updates, share their status, and make requests.



32. Navigate to **Setup > Security > Sharing Settings**.
33. In the Manage Sharing Settings For: dropdown box and select **Company News**.
34. Scroll down and click **New** under Sharing Rules.

SETUP
Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each other's data. Go to [Sharing Settings](#) to monitor and progress on a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: **Company News**

[Disable External Sharing Model](#)

Default Sharing Settings

Organization-Wide Defaults [Edit](#) [Organization-Wide Defaults Help ?](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Company News	Public Read/Write	Public Read Only	☒

Other Settings [Other Settings Help ?](#)

Manager Groups ☐ [?](#)

Use person role for first user in community account ☐ [?](#)

Grant community users access to related cases ☒ [?](#)

Secure guest user record access ☒ [?](#)

Sharing Rules

Company News Sharing Rules [New](#) [Recalculate](#) [Company News Sharing Rules Help ?](#)

Action	Criteria	Shared With	Access Level
Edit Del	Company News: Public EQUALS True	COVID19 Response Community Site Guest User	Read Only

35. Fill out the following details for the sharing rule, then click **Save**:

- Label and Rule Names: **PublicNews**
- Rule Type: **Guest user access, based on criteria**
- Criteria: **Public Equals True**
- Share With: (Select the guest user that corresponds to your community name)

SETUP
Sharing Settings

Label **PublicNews**

Rule Name **PublicNews** [?](#)

Description

Step 2: Select your rule type

Rule Type ☐ Based on record owner ☐ Based on criteria ☒ **Guest user access, based on criteria**

Step 3: Select which records to be shared

By modifying the default settings in accordance with these criteria, you are allowing immediate and unlimited access to all records matching these criteria to anyone, because this sharing rule grants access to guest users without login credentials. To secure your community for guest users, consider all the use cases and implications and implement security controls that you think are appropriate for the sensitivity of your data. Salesforce is not responsible for any exposure of your data to unauthenticated users related to this change from default settings.

Criteria	Field	Operator	Value	
	Public	equals	True	AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

[Add Filter Logic...](#)

Step 4: Select the users to share with

Share with **COVID19 Response Community Site Guest User**

Step 5: Select the level of access for the users

Access Level **Read Only**

36. Repeat steps 33–35 for the Crisis object.

- a. Manage Sharing Settings For: **Crisis**
- b. Label and Rule Names: **CrisisGuestSharing**
- c. Rule Type: **Guest user access, based on criteria**
- d. Criteria: **Status Not Equal to Closed**
- e. Share With: (Select the guest user that corresponds to your community name)

37. Repeat steps 33–35 for the Location object.

- a. Manage Sharing Settings For: **Location**
- b. Label and Rule Names: **LocationGuestSharing**
- c. Rule Type: **Guest user access, based on criteria**
- d. Criteria: **Visible on Home Page Equals True**
- e. Share With: (Select the guest user that corresponds to your community name)

38. Repeat steps 33–35 for the Person object.

- a. Manage Sharing Settings For: **Person**
- b. Label and Rule Names: **PersonGuestSharing**
- c. Rule Type: **Guest user access, based on criteria**
- d. Criteria: **City Not Equal To 123456**
- e. Share With: (Select the guest user that corresponds to your community name)

You're all done! Your portal is now live and ready to be shared!

Set Up Approvals for Employee Requests

In Setup, enter **Approval** in the Quick Find box and select **Approval Processes**. In the Manage Approval Processes For dropdown menu, select **Employee Request**. In the Create New Approval Process dropdown menu, select **Use Standard Setup Wizard**.

Approval Processes

Approval Processes
Employee Request

Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

1. Read the help topic
2. View the checklist
3. Create a custom user hierarchical relationship field
4. Create email templates
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
7. Activate the process to deploy to your users

Manage Approval Processes For: **Employee Request**

Create New Approval Process
Use Jump Start Wizard
Use Standard Setup Wizard

No approval processes available

1. Enter the process name: **Employee Request Approval Process**. The Unique Name field is automatically filled in. Optionally, enter a description. Then click **Next**.

New Approval Process

Employee Requests

Step 1. Enter Name and Description

Enter a name and description for your new approval process.

Enter Name and Description

Process Name: **Employee Request Approval Process**

Unique Name: **Employee_Request_Approval_Process**

Description:

Next Cancel

2. For Step 2, enter the following information:
 - a. Use this approval process if the following **criteria are met**
 - b. **Employee Request: Approver not equal to ""**
 - c. **Employee Request: Record Type equals** General Request, Remote Working Request, Job-Related Items Request

New Approval Process
Employee Requests

Help for this Page ?

Step 2. Specify Entry Criteria Step 2 of 6

Previous Next Cancel

If only certain types of records should enter this approval process, enter that criteria below. For example, only expense reports from employees at headquarters should use this approval process.

Specify Entry Criteria

Use this approval process if the following criteria are met :

Field	Operator	Value	
Employee Request: Approver	not equal to	---	AND
Employee Request: Record Type	equals	General Request, Ren	AND
---	---	---	AND
--None--	--None--	---	AND
--None--	--None--	---	AND

Add Filter Logic...

Previous Next Cancel

3. Click **Next**.
4. Make sure that the Next Automated Approver Determined By field is set to **None** and that **Administrators ONLY** can edit records during the approval process. Click **Next**.

New Approval Process
Employee Requests

Help for this Page ?

Step 3. Specify Approver Field and Record Editability Properties Step 3 of 6

Previous Next Cancel

When you define approval steps, you can assign approval requests to different users. One of your options is to use a user field to automatically route these requests. If you want to use this option for any of your approval steps, select a field from the picklist below. Also, when a record is in the approval process, it will always be locked-- only an administrator will be able to edit it. However, you may choose to also allow the currently assigned approver to edit the record.

Select Field Used for Automated Approval Routing

Next Automated Approver Determined By --None--

Use Approver Field of Person Owner ☐

Record Editability Properties

☒ Administrators **ONLY** can edit records during the approval process.

☐ Administrators **OR** the currently assigned approver can edit records during the approval process.

Previous Next Cancel

5. Click on the lookup icon next to Approval Assignment Email Template. Select **Crisis Response App**, then select **New Employee Request** for employee requests. Click **Next**.



Lookup

You can use * as a wildcard next to other characters to improve your search results.

Recently Viewed Email Templates

Name	Description	Template Type
Employee Request Approved		Text
Employee Request Denied		Text
New Employee Request	New request (non-Travel) email	Text
New Travel Request		Text
Travel Request Approved		Text
Travel Request Denied		Text

- On Step 5, click **Next**.
- On Step 6, click **Save**.
- Select **I'll do this later**, then click **Go!**



Approval Processes

What Would You Like To Do Now?

You have just created an approval process. However, you cannot activate this process until you define at least one approval step. Would you like to do that now?

☐ Yes, I'd like to create an approval step now.
 ☒ I'll do this later. Take me to the approval detail page to review what I've just created.
 ☐ I'll do this later. Take me back to the listing of all approval processes for this object.

- On the Approval Process setup page, select **New Approval Step**.

Process Definition Detail

Process Name	Employee Request Approval Process	Active	☐
Unique Name	Employee_Request_Approval_Process	Next Automated Approver Determined By	
Description			
Entry Criteria	(Employee Request: Approver NOT EQUAL TO) AND (Employee Request: Record Type EQUALS General Request,Remote Working Request,Job-Related Items Request)		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	☐
Approval Assignment Email Template	New Employee Request		
Initial Submitters	Person Owner		
Created By	Justin Kuryliw, 3/26/2020, 2:39 PM	Modified By	Justin Kuryliw, 3/26/2020, 2:39 PM

Initial Submission Actions

Action Type	Description
Record Lock	Lock the record from being edited

Approval Steps



You have not yet defined any approval steps

10. Enter the Name **Sent to approver**. The Unique Name is automatically filled in. Make sure Step Number is **1**. Click **Next**.

Step 1. Enter Name and Description

Step 1 of 3

Next Cancel

Enter a name, description, and step number for your new approval step.

Enter Name and Description ! = Required Information

Approval Process Name Employee Request Approval Process

Name Sent to approver

Unique Name Sent_to_approver

Description

Step Number 1

Next Cancel

11. Click **Next** again.

12. Select **Automatically assign to approver(s)**. In the dropdown menus, select **Related User** and **Approver**. Click **Save**.

Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.

Select Approver

☐ Let the submitter choose the approver manually.

☐ Automatically assign to queue.

☒ Automatically assign to approver(s).

Related User Approver

When multiple approvers are selected:

☒ Approve or reject based on the **FIRST** response.

☐ Require **UNANIMOUS** approval from all selected approvers.

☐ The approver's delegate may also approve this request.

Previous Save Cancel

13. Select **No, I'll do this later**. Then click **Go!**

14. Under Approval Steps, find the step you just created and click **Show Actions**.

15. For Approval or Rejection Actions, select **Add Existing**. Enter the following information for each type:

- a. For approved Employee Requests:
 - i. Email Alert: Notify Person
 - ii. Field Update: Approval Date
 - iii. Field Update: Approved Field
 - iv. Field Update: Update Status
- b. For denied Employee Requests:
 - i. Email Alert: Notify Denied Person
 - ii. Field Update: Update denied status

16. Click **Activate**.

17. On the Employee Request: Request Approval record page, click **Clone**.

Approval Processes
Employee Request: Request Approval
[« Back to Approval Process List](#)

Process Definition Detail

Edit Clone Deactivate

Process Name	Request Approval	
Unique Name	Request_Approval	Next Autom
Description		
Entry Criteria	(Employee Request: Record Type NOT EQUAL TO Travel Approval) AND (Employee R	

18. Enter the Name Travel Request Approval Process. The Unique Name field is automatically filled in.

19. From the Travel Request Approval Process record page, click **Edit > Entry Criteria**.

Approval Processes
Employee Request: Travel Request Approval Process
[« Back to Approval Process List](#)

Process Definition Detail

Edit Clone Delete Activate

Process Name	Travel Request Approval Process	
Unique Name	Travel_Request_Approval	Next Automated Approver
Description		
Entry Criteria	(Employee Request: A	e Request: Record Ty
Record Editability	Administrator ONLY	Allow Submitters to Rec
Approval Assignment Email Template	New Employee Request	

- Name and Description
- Entry Criteria
- Approver Field and Record Editability
- Notification Templates
- Approval Page Layout
- Initial Submitters

20. Enter the following information:

- Travel Request: Approver not equal to ""
- Travel Request: Record Type equals Travel Approval

Specify Entry Criteria

Use this approval process if the following criteria are met:

Field	Operator	Value	
Employee Request: Approver	not equal to	""	AND
Employee Request: Record Type	equals	Travel Approval	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

Previous Save Next Cancel

21. Click **Save**.

22. On the Employee Request: Request Approval record page, click **Edit > Notification Templates**.

Approval Processes
Employee Request: Request Approval
« [Back to Approval Process List](#)

Process Definition Detail

Process Name	Request Approval
Unique Name	Request_Approval
Description	
Entry Criteria	(Employee Request: Rec
Record Editability	Administrator OR Current Appr
Approval Assignment Email Template	New Employee Request
Initial Submitters	Group: All Internal Users, Person Owner, Record Creator

Buttons: Edit, Clone, Deactivate

Dropdown Menu:

- Name and Description
- Entry Criteria
- Approver Field and Record Editability
- Notification Templates**
- Approval Page Layout
- Initial Submitters

23. Click **Save**.

24. Scroll down to Approval Actions. Click **Show Actions**.

Approval Steps [New Approval Step](#)

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Hide Actions Edit Del	1	Sent to approver			Related User: Approver	Final Rejection

Approval Actions [Add Existing](#) [Add New](#)

Action	Type	Description
Edit Remove	Field Update	Approved Date
Edit Remove	Field Update	Approved Field
Edit Remove	Email Alert	Notify Person

Rejection Actions [Add Existing](#) [Add New](#)

Action	Type	Description
Edit Remove	Email Alert	Notify Denied Person
Edit Remove	Field Update	Update Denied Status

25. Under Approval Actions, click **Edit** on the Email Alert action.

26. Click on the lookup icon. Select **Crisis Response App**, then search for Travel. Change the email alert to Travel Request Approved.

Lookup

Crisis Response App [Go!](#)

You can use *** as a wildcard next to other characters to improve your search results.

[Clear Search Results](#)

Search Results

Name	Description	Template Type
New Travel Request		Text
Travel Request Approved		Text
Travel Request Denied		Text

27. Under Rejection Actions, click **Edit** on the Email Alert action.

28. Click on the lookup icon. Select **Crisis Response App**, then search for Travel. Change the email alert to Travel Request Denied.

29. Click **Activate**.
30. Navigate to **Setup > Process Automation > Process Builder**.
31. Activate the Populate Request with Approvals Enabled process.

Approvals are ready to go! You can add approvers by navigating to the Crisis Response home page and clicking **New**.

The screenshot shows the Crisis Response app dashboard. The top navigation bar includes links for Home, Crises, People, Impact to People, Employee Requests, Employee Assistance Programs, Locations, and Company News. The left sidebar contains a menu with Dashboard, Items to Approve, My Tasks, and Approver Settings. The main content area displays a message about active approvers for Employee Requests and a table of active approvers. A 'New' button is highlighted in the table's header. The right sidebar features a welcome message, an Office Status table, a Coronavirus COVID-19 statistics dashboard, and a Twitter feed.

Active Approvers

3 items • Sorted by User • Filtered by all approvers • Approver Type • Updated a few seconds ago

	User	Approver Type
1	Claire Pelton	Remote Working Requests
2	Justin Kuryliw	Travel Approvals
3	Surabhi Ravishankar	Executive Approver

Create a new approver by clicking the "New" Button.
 *You need special access to modify approvers. If you don't see the "New" button, contact your administrator and ask for the "Crisis Response Approver" permission set.

Office Status

Location Name	Status
Distribution Center	Open
212 5th Street Location	Partial Hours
Chicago Office	Hard Close

Coronavirus COVID-19 Glob...

Total Confirmed: **526,044**
 Total Deaths: **23,709**
175 countries/regions

Tweets by @CDCgov

Location Check-In Setup (Optional)

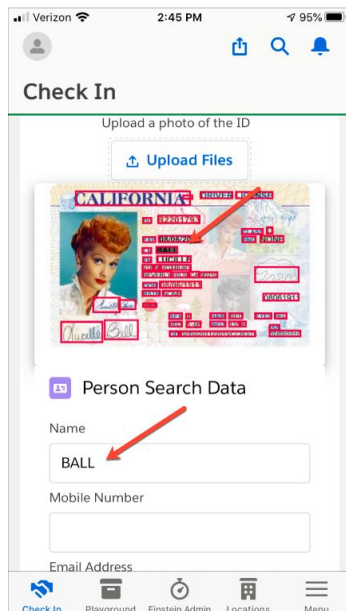
Overview

Data entry in situations such as building check-ins is time consuming and requires direct physical contact with individuals and their identification documents. The Location Check-In App enables a user to extract textual data from a picture of an ID:

- Reducing the time required for data entry
- Increasing accuracy
- Providing a data trail
- Eliminating physical contact with the individual and their documents

As an example, a receptionist at the entrance to a company's facility must enter and confirm data from a visitor's ID in order to keep a visitor record. This visitor record is critical information that enables the company to contact potentially affected visitors should there be an exposure at the facility. Many forms of identification contain digital interfaces such as 2D bar codes, QR codes, or RFID chips, but in a crisis situation, companies may not be able to rely on all visitors carrying high-tech IDs and may not have time to develop sophisticated scanning applications.

With the Location Check In app, the receptionist takes a photo of the ID using the Salesforce Mobile app. The text is extracted using Einstein Vision OCR (Optical Character Recognition). The receptionist uses the scanned information to quickly find existing visitor information. If this is a new visitor, the scanned information can be used to create a new record of the individual and a visit is logged.



To use the app, select the **Location Check In** app inside the **Salesforce Mobile App**. Select the **Check In** tab. Click the **Upload Files** button to take a picture of the ID. Then, click on the text in the ID you wish to copy, followed by the field you'd wish to paste the text into (i.e. click on first name in the ID Image, then click on name field). Once the check-in is complete, a visit will be logged to the location selected and person identified.

Enabling the Check-In App

Access to the Location Check In app is managed through the **Crisis Response - Einstein Playground** and **Crisis Response - IDReader** permission sets. Additionally, an Administrator needs to configure the Einstein Playground connection to an Einstein.ai account.

Permission Sets

To assign a permission set,

1. From Setup, enter Users in the Quick Find box, then select **Users**.
2. Select a user.
3. In the Permission Set Assignments related list, click **Edit Assignments**.
4. To assign a permission set, select it under Available Permission Sets and click **Add**. Assign the **Crisis Response - Einstein Playground*** and **Crisis Response - IDReader** permission sets to any user you wish to have access to the app.
5. Click **Save**.

Einstein.ai Connection

You will need an Einstein.ai account to enable the app to invoke the Einstein OCR model. You can sign up for a free account online that will provide up to 2,000 predictions per month. If you need more, contact your Salesforce Account Executive. Once you have the account, you configure the Einstein Playground in your org to access the Einstein.ai account.

1. Sign Up
(<https://metamind.readme.io/docs/what-you-need-to-call-api#section-get-an-einstein-platform-account>) for an Einstein.ai account.
2. In your org, open either the **Location Check In** or **Einstein Playground** apps.
3. Select the **Einstein Admin** tab.
4. Select the **Setup and Configuration** link on the left sidebar.
5. Enter the email address used to sign up for the Einstein.ai account and upload the PEM file provided to you when you signed up.
6. Click **Save**.

Share PEM file

Each user that needs access to the Einstein services will need read access to the PEM file that was uploaded. The simplest way to manage access to the PEM file is by adding all users that need access to a Chatter Group specifically for this purpose, then share the file to that group.

1. As the Admin that configured the Einstein.ai Connection, create a Chatter Group.

2. Add all users that need to use the Check In app to this group.
3. Open **Files** from the App Launcher and find the file **einstein_platform** and select **Share** from the context menu.
4. Select Share With **Groups**. Select the group you just created and give the group Viewer permission
5. Click **Share**

As new users need access to the Check In app, add them to the chatter group.

Optional Customizations to the Location Check-In App

Optionally, the image can be classified into its specific form of ID using an Einstein Vision Image Classification machine learning model and custom-developed code. This enables a more precise mapping of the scanned text data to fields on the visitor's record, but it requires the company to invest development resources to customize the app.

To see detailed instructions for how to make these customization, view the guide here:

<https://salesforce.quip.com/IS9IAsr4RJnO#KFVACAqfxtq>

Considerations for Government Cloud Orgs

This section applies only to customers using Salesforce Government Cloud.

Please note that while it is possible to install and set up the Crisis Response App so that it is fully native within the Customer's Salesforce Government Cloud instance, the Crisis Response App is not included within the Federal Risk and Authorization Management Program (FedRAMP) and U.S. Department of Defense (DoD) Impact Level 4 (IL4) Authorization Boundaries for the Salesforce Government Cloud. The package would still require the Authorizing Official to review and assess the package as part of the Risk Management Framework (RMF).

Additionally, some services included in this package are designed to work with Einstein Platform Services, which is also not included within the FedRAMP Authorization Boundary. As such, there is an additional step needed to restrict the application from accessing these services.

To disable callouts to Einstein Platform Services, navigate to Setup, enter **Remote site settings** in the Quick Find box and select **Remote Site Settings**. In the Remote Site Settings list view, find the **Einstein_Platform_Services** setting. Click **Del** within the action column. Click **OK**.

NOTE: *Einstein Platform Services is not currently part of the core functionality of the application, and the app will continue to work as intended. This will, however, prevent the use of some future functionality that will allow for Work-ID Image scanning for fast location check-ins.*