salesforce

Employee Workspace

Salesforce, Spring ’23

@salesforcedocs
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CONTENTS

EMPLOYEE WORKSPACE

Empower your employees to work from anywhere and be productive and engaged. With Employee Workspace, give your employees an integrated experience and enable employee productivity and collaboration. Employee Workspace provides a central hub for tools and resources your employees need to work from anywhere.

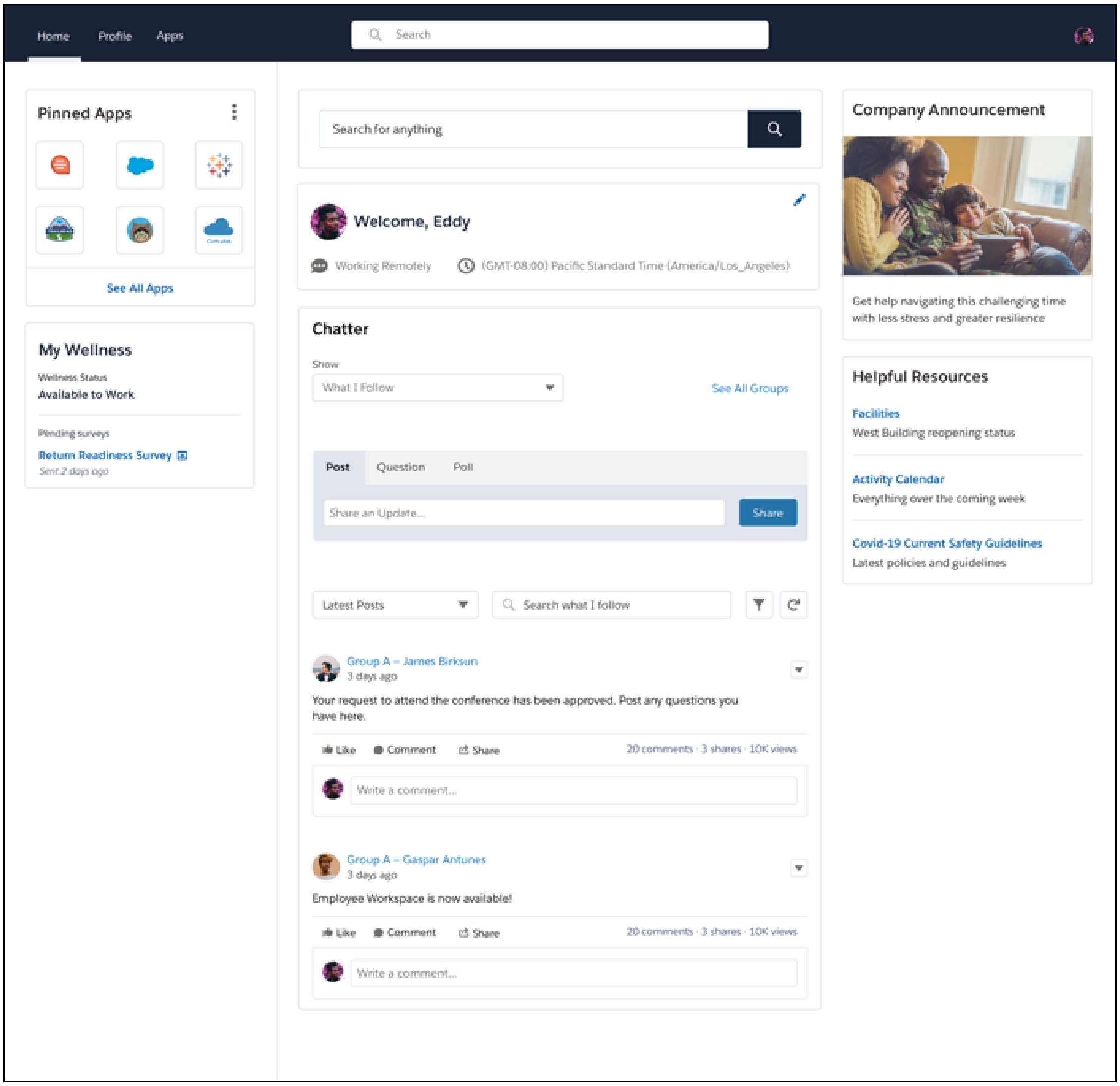
Employees can personalize their home page to view work that's most important and relevant to them. They can access their favorite apps, collaborate with colleagues, receive company communications, review and confirm shifts, respond to latest surveys, and more. Employees can also personalize their profile page to connect with their coworkers and introduce themselves and what they do.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Employee Workspace requires a Workplace Command Center add-on license, or an Employee Experience add-on license.



[Set Up Employee Workspace]

Configure general settings and use our installer service to install the package and complete some configuration automatically. Then follow the post-installation steps and import data to finish your setup.

[Work From Anywhere With Employee Workspace]

Employee Workspace gives you access to all the tools and resources you need to work from anywhere and be productive. You can personalize your workspace to create a single pane of glass to manage your work life. Use Employee Workspace to access apps, stay informed with company news, collaborate with your colleagues, share your work experiences, manage your profile details, and more.

SEE ALSO:

Work.com Developer Guide

Downloadable User Guides

Set Up Employee Workspace

Configure general settings and use our installer service to install the package and complete some configuration automatically. Then follow the post-installation steps and import data to finish your setup.

Make sure to follow the configuration and installation steps in order.

Note: Employee Workspace doesn't support employee field visibility rules. Enabling employee field visibility rules can lead to unwanted behavior.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Employee Workspace requires a Workplace Command Center add-on license, or an Employee Experience add-on license.

Configure General Settings for Employee Workspace

Before you can install the Employee Workspace package, you must configure these general settings in your org.

Install Employee Workspace

Install the Employee Workspace package. Then return to Salesforce Help to complete setup in your org.

Meet the Employee Workspace Personas

We defined two user personas we expect most organizations need for the Employee Workspace site.

Create and Link Employees and Users

Your org may already have Employee records if you've been using Workplace Command Center. If not, you need to create or import Employee records. Employees who need access to Employee Workspace must have an associated User record to log in to the site and access data. After you add Employee records to your org, use the User lookup field to link Employee and User records.

Customize Employee Workspace

When you install the Employee Workspace package, some of the customizations are automatically completed. Follow these steps to complete the additional manual configuration.

Create Your Branded App for Employee Workspace

Use Mobile Publisher to create and distribute a fully branded version of your Employee Workspace site that looks great on any mobile device. Get your app icon, your name, your colors, and—most importantly—your very own listing in Google Play and Apple App store.

Configure General Settings for Employee Workspace

Before you can install the Employee Workspace package, you must configure these general settings in your org.

Enable Digital Experiences for Employee Workspace

Employee Workspace uses Experience Cloud to collaborate with employees and share information. Even if you already have a Workplace Command Center site, you must create a new Experience Cloud site for your employees.

Brand Your Org

Set up custom brand images and colors in your org using themes. You can choose one of the built-in Salesforce themes, or create your own custom themes with just a few clicks.

Enable Digital Experiences for Employee Workspace

Employee Workspace uses Experience Cloud to collaborate with employees and share information. Even if you already have a Workplace Command Center site, you must create a new Experience Cloud site for your employees.

USER PERMISSIONS

To enable digital experiences:
- Customize Application

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences.

1. From Setup, enter `Digital Experiences` in the Quick Find box, then select **Digital Experiences** > **Settings**.

   Tip: If you don't see this menu, Digital Experiences might not be available for your Salesforce org. Contact your Salesforce account executive.

2. Select **Enable Digital Experiences**.
3. Enter a domain name for your site, and click **Check Availability** to make sure that it's not already in use.

   We suggest that you use something recognizable to your users, such as your company name.

   Important: You can't change the domain name after you save it.

4. Click **Save**.

SEE ALSO:

Enable Digital Experiences

Brand Your Org

Set up custom brand images and colors in your org using themes. You can choose one of the built-in Salesforce themes, or create your own custom themes with just a few clicks.

Tip: You don't have to brand your org, but it's an easy way to get off to a good start.

1. From Setup, enter `Themes in Quick Find`, and choose **Themes and Branding**.
2. Click **New Theme**.
3. Under Branding, change the image to your organization's logo.
4. Click **Save** and **Activate**.

SEE ALSO:

Brand Your Org in Lightning Experience

Install Employee Workspace

Install the Employee Workspace package. Then return to Salesforce Help to complete setup in your org.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Employee Workspace requires a Workplace Command Center add-on license, or an Employee Experience add-on license.

Install the Employee Workspace Package

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Employee Workspace requires a Workplace Command Center add-on license, or an Employee Experience add-on license.

USER PERMISSIONS

To configure installed packages:
- Customize Application

Use the Work.com installer to install and automatically complete some configuration for the Employee Workspace managed package. Then, follow the manual, post-installation steps to complete the setup.

Before installing the packages, complete the required org setup steps listed here: Configure General Settings for Employee Workspace.

Note: Before installing this package, confirm that these Salesforce installer IP addresses aren't within any restricted ranges, or add them to an allowlist:

- 18.214.2.206
- 3.89.46.237
- 52.201.65.75
- 52.2.53.142

You can remove these IP addresses from your allowlist after installation.

1. Navigate to this URL in your browser: https://install.work.com/

   Note: The Salesforce installer service is used only for the installation and initial configuration of the Employee Workspace package.

2. Click **Employee Productivity** then **Employee Workspace**.
3. Click **Install and Configure Employee Workspace**.
4. Click **Log In to Start Pre-Install Validation**.
5. Select your org type. Enter your Salesforce username and password.
6. Click **Allow** to run the pre-installation validation.
7. In the **Connected to Salesforce** box, confirm that you're logged in to the correct org. If the pre-install validation fails, use the error messages in the installer to troubleshoot and complete the pre-installation requirements in your org. When you're ready, return to the installer URL and try again.
8. Review the list of customizations the installer makes in your org.

Steps	Type	
Install Employee Workspace Managed Package	Package	Required
Create Employee Workspace Permission Sets	Other	Required
Assign Permission Set to an Admin User	Other	Required
Configure Sharing Settings on Employee Object for Employee Workspace Users	Metadata	Required

9. Click **Install**. Click **Confirm** to accept the terms of use.

During installation, your user is assigned the Employee Workspace Admin permission set that is needed to configure and manage the org. After a successful installation, follow the prompts throughout the Salesforce Help topics to complete manual post-installation configuration.

Note: Currently, the Salesforce installer service is available only in English.

Verify Employee Workspace Installation and Auto-Configuration

See what's customized when installing the Employee Workspace package.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences.

Installation step Name	What it Does
Install Employee Workspace Managed Package	Installs the Employee Workspace custom objects and fields. Important: For the Case object, Feed Tracking is enabled by default. You can disable Feed Tracking, but disable it only temporarily. Re-enable Feed Tracking so that it works as expected in Employee Workspace.
Create Employee Workspace Permission Sets	Creates the permission sets to assign admins and employees custom access to objects and data. To use these permissions, you must manually assign users to the permission sets.
Assign Permission Set to an Admin User	Assigns the Employee Workspace Admin permission set to an admin user to complete the installation and configuration, and to manage the org after setup.
Configure Sharing Settings on Employee Object for Employee Workspace Users	Creates recommended default access on the Employee object for the Employee Workspace site users.

EDITIONS

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SEE ALSO:

Update Your Experience Cloud Site's Name, Status, and Description

Meet the Employee Workspace Personas

We defined two user personas we expect most organizations need for the Employee Workspace site.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences.

Employee Workspace Admin

A Salesforce system administrator. Admins have full access to Employee Workspace data. Can configure a Experience Cloud site and provide access to members.

Note: To limit access to sensitive employee data, Salesforce recommends granting admin privileges only to admins who must know the information.

Employee

A member of the Employee Workspace site. Can view and edit the records they own and can view the records that are shared with them.

When you install the Employee Workspace managed package following our instructions, permission sets for each of these personas are added to your org.

Important: We strongly recommend that you associate each persona with the license, profile, and permission sets as indicated in this table.

Persona	User License	Profile	Permission Set	Permission Set License
Employee Workspace Admin	Salesforce	System Admin	Employee Workspace Admin	Workplace Command Center OR Employee Experience
Employee	Salesforce Platform	Standard Platform User	• Employee Workspace User • Employee Workspace User Data Access	Workplace Command Center OR Employee Experience

Configure Field Access Settings on the Employee Object

If your org was created before February 8, 2021, you must manually set field accessibility on the Employee object for the Standard Platform User profile. The Standard Platform User profile is the profile associated with the Employee Workspace users.

Assign Employee Workspace User Permission Sets

The Employee Workspace User and Employee Workspace User Data Access permission sets are automatically created when you install the package. You must manually assign users to these permission sets.

Add Employee Workspace Admins

An Admin has full access to Employee Workspace data, can create Experience Cloud sites, and provide access to site members. Create system admins only if your organization needs them.

Configure Field Access Settings on the Employee Object

If your org was created before February 8, 2021, you must manually set field accessibility on the Employee object for the Standard Platform User profile. The Standard Platform User profile is the profile associated with the Employee Workspace users.

EDITIONS

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USER PERMISSIONS

To view field accessibility:
- View Setup and Configuration

To change field accessibility:
- Customize Application

  AND

  Manage Profiles and Permission Sets

Important: Skip this step if your org was created after February 8, 2021. The default field level security settings for those newer orgs were updated with the settings outlined on this page. Verify your org settings against the fields listed on this page.

1. From Setup, enter `Field Accessibility` in the Quick Find box, then select **Field Accessibility**.
2. In the list, find and click **Employee**.
3. Click **View By Profiles** and select **Standard Platform User**.
4. For the `Employee Number` field, click Field Access.
5. Under Field-Level Security, select **Read-Only**, and click **Save**.
6. For the `Alternate Email` field, click Field Access.
7. Under Field-Level Security, deselect **Visible** and click **Save**.
8. Repeat step 6 and 7 for these fields:
   - `Date Of Birth`
   - `Gender`
   - `Home Address`
   - `Home Phone`
   - `Middle Name`
   - `Status As Of`
   - `Status End Date`
   - `Wellness Status`
   - `Worker Type`

SEE ALSO:

What Determines Field Access?

Assign Employee Workspace User Permission Sets

The Employee Workspace User and Employee Workspace User Data Access permission sets are automatically created when you install the package. You must manually assign users to these permission sets.

USER PERMISSIONS

To assign permission sets:
- "Assign Permission Sets"

To create users:
- "Manage Internal Users"

1. From Setup, enter `Users` in the Quick Find box, then select **Users**.
2. Click **New User**.

   Note: The username must be unique across all Salesforce orgs. The username must be in the format of an email address, for example, jane@salesforce.com. The email for this username doesn't have to function.

3. In the User License field, select **Salesforce Platform**.

4. In the Profile field, select the **Standard Platform User** profile.
5. Click **Save**.
6. At the top of the page, click **Permission Set Assignments** > **Edit Assignments**.
7. Select **Employee Workspace User** and **Employee Workspace User Data Access**, and add them to the enabled permission sets.
8. Save your changes.

SEE ALSO:

Manage Users

Create a Permission Set Associated with a Permission Set License

Add Employee Workspace Admins

USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

To create users:
- Manage Internal Users

An Admin has full access to Employee Workspace data, can create Experience Cloud sites, and provide access to site members. Create system admins only if your organization needs them.

The admin who installed the Employee Workspace managed package following our recommended process is automatically assigned the Employee Workspace Admin permission set. If your organization requires additional admins, create users and grant permissions manually.

Note: As of the Summer '21 release, the `UserId` field on the Employee object isn't accessible by default. If necessary, edit the field-level security settings for the relevant permission set or profile.

1. From Setup, enter *`Users`* in the Quick Find box, then select **Users**.
2. Click **New User**.

   Note: The username must be unique across all Salesforce orgs. The username must be in the format of an email address, for example, jane@salesforce.com. The email for this username doesn't have to function.

3. In the User License field, select **Salesforce**.
4. In the Profile field, select the **System Administrator** profile or similar depending on your org's profile settings.
5. Click **Save**.
6. At the top of the page, click **Permission Set Assignments** > **Edit Assignments**.
7. Select **Employee Workspace Admin** and click to add it to the enabled permission sets.
8. Save your changes.

SEE ALSO:

Manage Users

Create a Permission Set Associated with a Permission Set License

Set Field Permissions in Permission Sets and Profiles

Create and Link Employees and Users

Your org may already have Employee records if you've been using Workplace Command Center. If not, you need to create or import Employee records. Employees who need access to Employee Workspace must have an associated User record to log in to the site and access data. After you add Employee records to your org, use the User lookup field to link Employee and User records.

Add Employee Records

The Employee object is a Work.com standard object.

1. From the **App Launcher**, find and select **Employees**.
2. Click **New**.
3. Enter values for each employee. Required fields are:
   - `First Name`
   - `Last Name`
   - `Status As Of`
   - `Email`
   - `Location`
   - `Employee Number`
   - `Worker Type`
   - `Employee Status`
4. Link the employee record to a user record using the `User` lookup field.
5. Click **Save** to finish, or **Save & New** to create another employee record.

SEE ALSO:

Automatically Sync Employee and User Records

Customize Employee Workspace

When you install the Employee Workspace package, some of the customizations are automatically completed. Follow these steps to complete the additional manual configuration.

Considerations for Employee Workspace Customizations

Keep the listed considerations in mind when customizing your Employee Workspace site.

Activate Your Employee Workspace Site

Activate your Experience Cloud site to send out a welcome email to all employees and also to set up SEO for your site.

Add Connected Apps

Add the connected apps that you want to your employees to access from the Employee Workspace site. Connected apps can include authorization to external apps, or basic settings directing an employee to an external site or web-based application.

Publish Your Employee Workspace Site

Publish the Employee Workspace site to make it available to employees.

Employee Workspace Customizations

Access to the Salesforce CMS is automatically enabled during installation. With this access, you can create a CMS Workspace and then customize the news banner, hero component, search component, and navigation bar on the homepage of your Employee Workspace site.

Add Default Apps to the Pinned App Widget

You can choose apps that you expect your employees to use most often and set them as default pinned apps. You can pin up to six apps in the Pinned Apps widget.

Considerations for Employee Workspace Customizations

Keep the listed considerations in mind when customizing your Employee Workspace site.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences.

Recommendations to Consider before Customizing Your Experience Cloud Site

- Add the components for Wellness and Shift Management only on the Employee Workspace homepage. The Wellness component is available only in orgs that have the Workplace Command Center package. The Shift Management components are available only in orgs that have the Shift Management package.
- Don't enable public access for the Employee Workspace site and ensure that only employees who are members can log in and access the site. See Control Public Access.
- Don't enable the optional feature to show nicknames because an employee can't modify the nickname of the synced user from Employee Workspace. By default, the full name of an employee is displayed in all locations in the site.

Limitations to Consider While Customizing Your Site's Pages

- The submenu items that you add to the navigation menu don't inherit the look and feel of the Employee Workspace site.
- Some fields such as Location and the employee photo for a profile page can't be edited by employees. These values are provided by the synced user account. Admins can edit the fields on the Employee record or the People record in the org hosting the site.
- The fields sets (`Employee Profile Card Secondary Region` and `Employee Profile Card Tertiary Region`) of the Employee object have these limitations:
  - You can edit the field sets to add only custom fields of the Employee and Location objects. The other standard fields that aren't grouped in the defined field set aren't marked as `Available for the Field Set`. And the field set can't be edited to include them.
  - You can't define the fields in the field set as required. The `Required` property on these fields isn't considered.
  - You can't add the `Gender` field to the field sets.

Activate Your Employee Workspace Site

Activate your Experience Cloud site to send out a welcome email to all employees and also to set up SEO for your site.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences.

To send a welcome email with the login information to members:

1. In Workspaces, click **Administration Emails**.
2. In Email Templates, select **Send welcome email**.
3. Click **Save**.

To activate the Employee Workspace site:

1. From Setup, enter *`All Sites`* in the Quick Find box, select **All Sites**.
2. Click **Workspaces** next to the Employee Workspace site.
3. In Workspaces, click **Administration Settings**.
4. Click **Activate**, and click **OK**.

You receive an email when the site is activated.

Add Connected Apps

Add the connected apps that you want to your employees to access from the Employee Workspace site. Connected apps can include authorization to external apps, or basic settings directing an employee to an external site or web-based application.

- Create a connected app: Connected Apps
- Define start URL settings: Manage Start URL Settings for a Connected App
- Configure access to the connected app: Assign it to the **Standard Platform User** profile or **Employee Workspace User** permission set. See Manage Access to a Connected App

Publish Your Employee Workspace Site

Publish the Employee Workspace site to make it available to employees.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences.

Before going live, you can preview your Experience Cloud site to see how it looks in a desktop browser window or on a mobile device.

1. From Setup, enter `Sites` in the Quick Find box, then select **All Sites**.
2. Select **Builder** next to the Employee Workspace community.
3. In the browser window, click **Preview** on the toolbar.
4. To preview the community on different devices (Mobile, Tablet, or Desktop), use the options in the menu.

When you're happy with the changes, publish your site. When you publish a site, all changes made to the site since the last time it was published are included.

1. From Setup, enter `Sites` in the Quick Find box, then select **All Sites**.
2. Select **Builder** next to the Employee Workspace site.
3. In the browser window, click **Publish** on the toolbar.

An email notification informs you when your changes go live.

SEE ALSO:

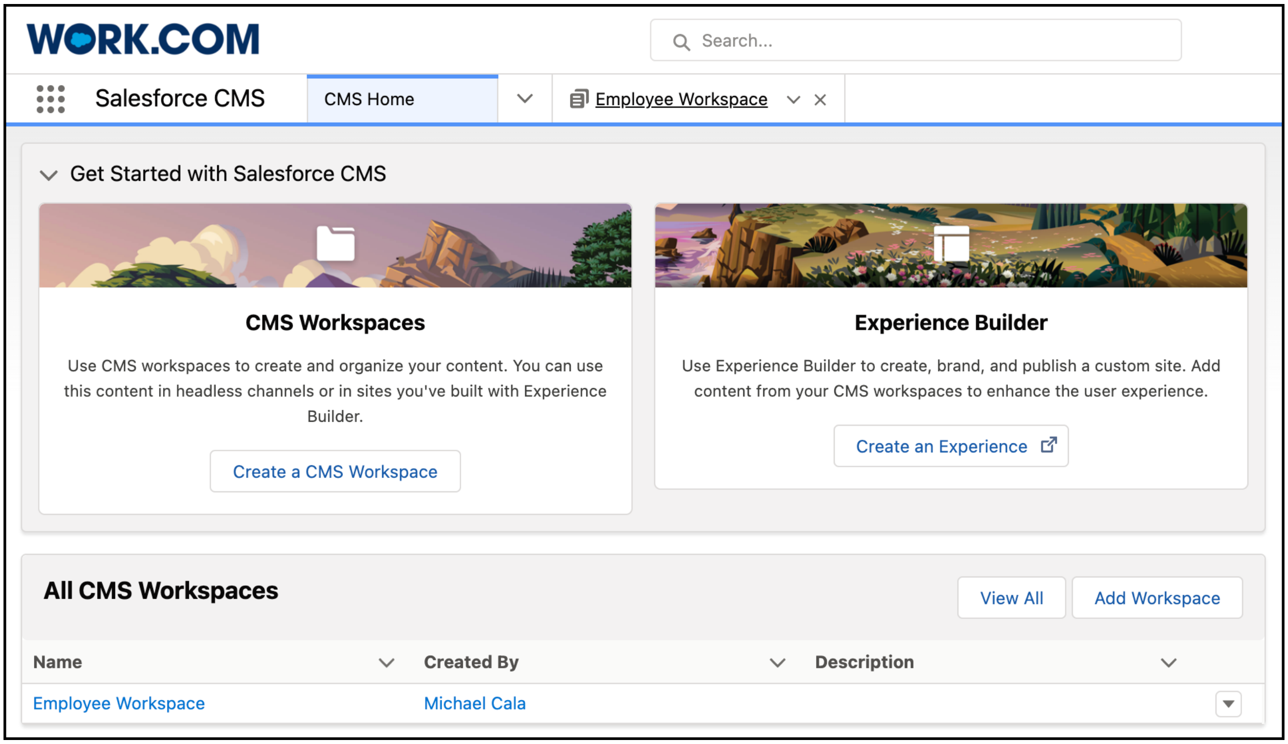
Customize Sites with Experience Builder

Employee Workspace Customizations

Access to the Salesforce CMS is automatically enabled during installation. With this access, you can create a CMS Workspace and then customize the news banner, hero component, search component, and navigation bar on the homepage of your Employee Workspace site.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences.

1. Create a CMS Workspace:
   a. From the Salesforce App Launcher, launch the Digital Experiences app.
      The Digital Experiences Home tab opens.



b. Click **Create a CMS Workspace** then enter a name and description.

c. Select your Employee Workspace Community site as a channel that uses the content.

d. Permission users and groups to create and manage content in the workspace.

Note: You can choose not to select any users or groups. If so, only the admins can contribute and manage content.

e. Set the Contributor Role as Content Admin or Content Manager.

- **Content Admin**
  Has access to all content in the CMS workspace and can manage contributors and content sharing.

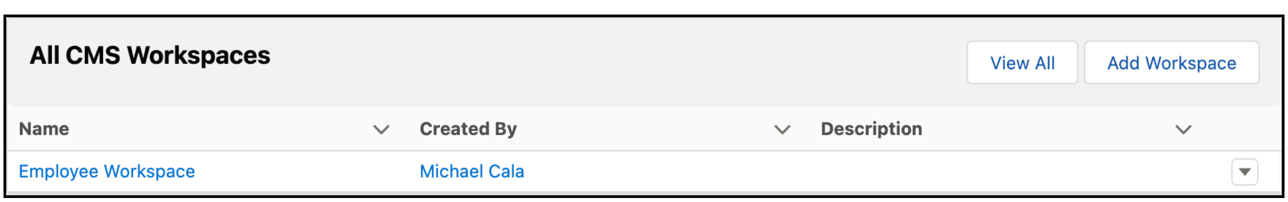
- **Content Manager**
  Has access to all content in the CMS workspace.

f. Set the default language.

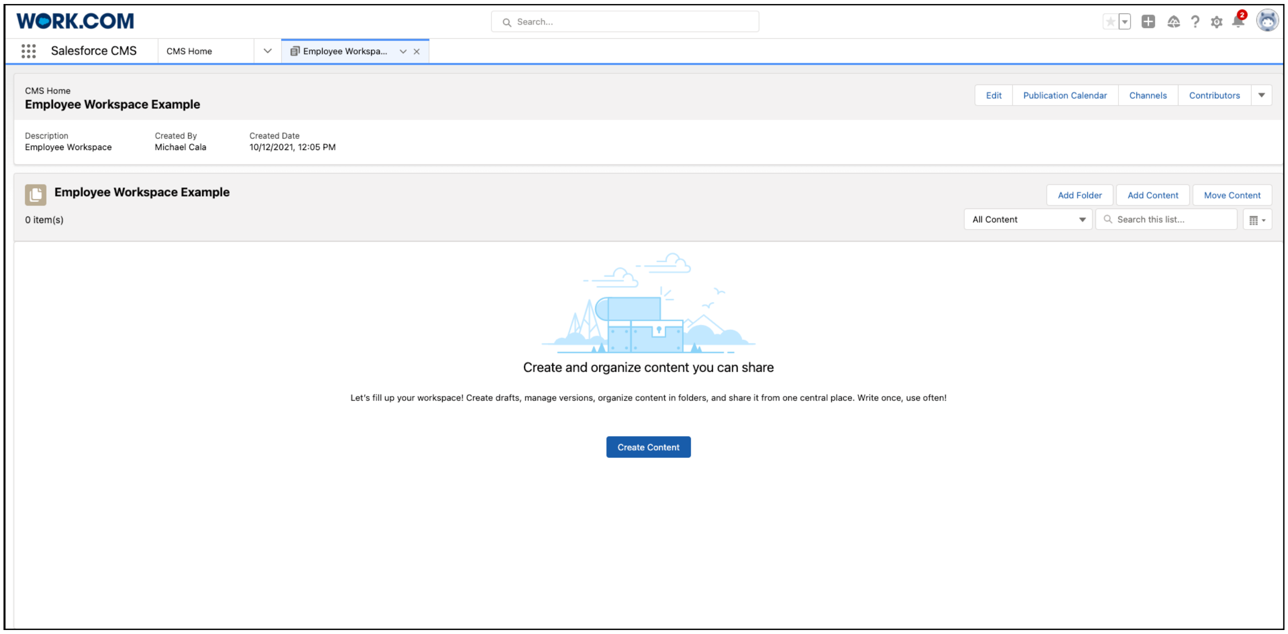
g. Review the information, and then click **Done**.

2. Create CMS Content:

a. From the CMS app Home tab, select a workspace from the All CMS Workspaces menu.

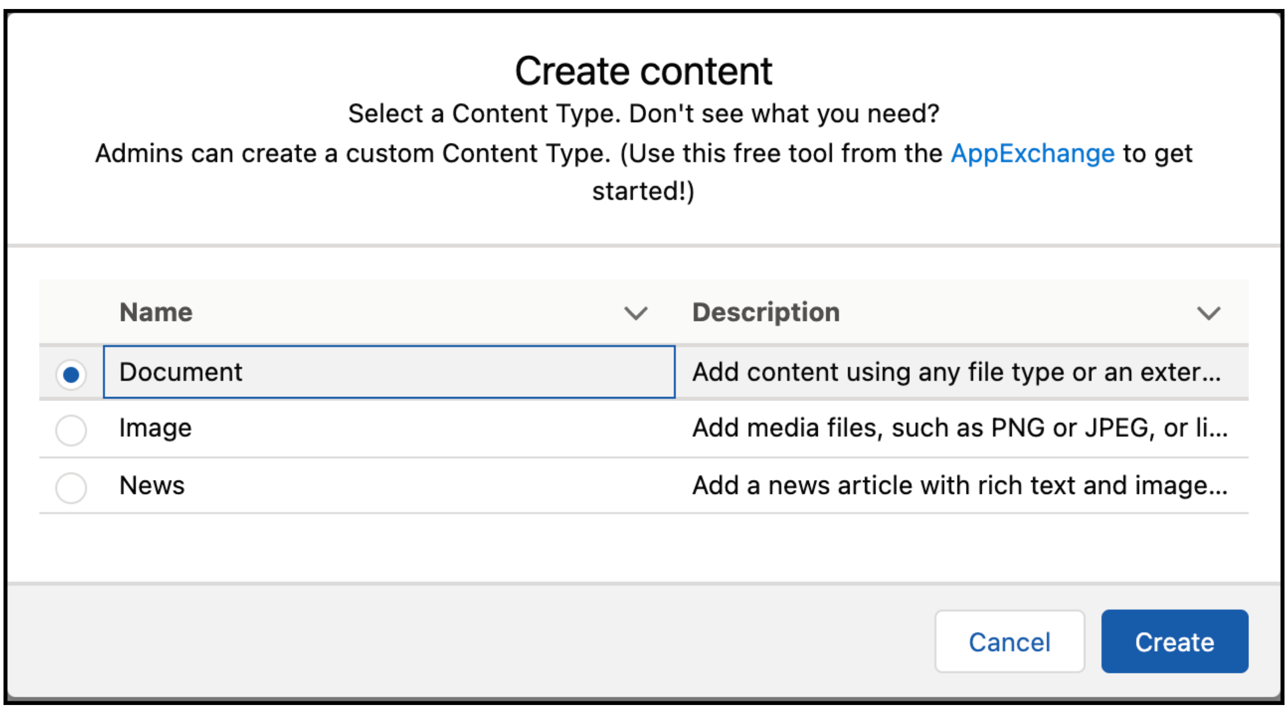


The Employee Workspace settings tab opens.



b. Click **Create Content**.
The Create Content window opens.

c. Select a content type, and then click **Create**.



d. In the Create Tab, enter content in the required fields, and then click **Save Draft**.

e. Click **Publish**.

f. Save the unique identifier for the content that you created.

   The unique identifier is in the web page URL starting with 20Y.

   `20Y5f000000tb2xEAA`

Next, customize your Employee Workspace site beginning with the news banner.

1. Customize the News Banner

   Deliver headline news to your employees within their Employee Workspace homepage. Create content for your Employee News Banner, and then add it to your Employee Workspace site.

2. Customize the Hero Component

   Customize the hero component layout for your Employee Workspace site. The hero component consists of a search box, background image, and title text on the Employee Workspace home page.

3. Add Search to Your Employee Workspace Page

   Add search anywhere on the Employee Workspace page with the search box component.

4. Customize the Navigation Bar

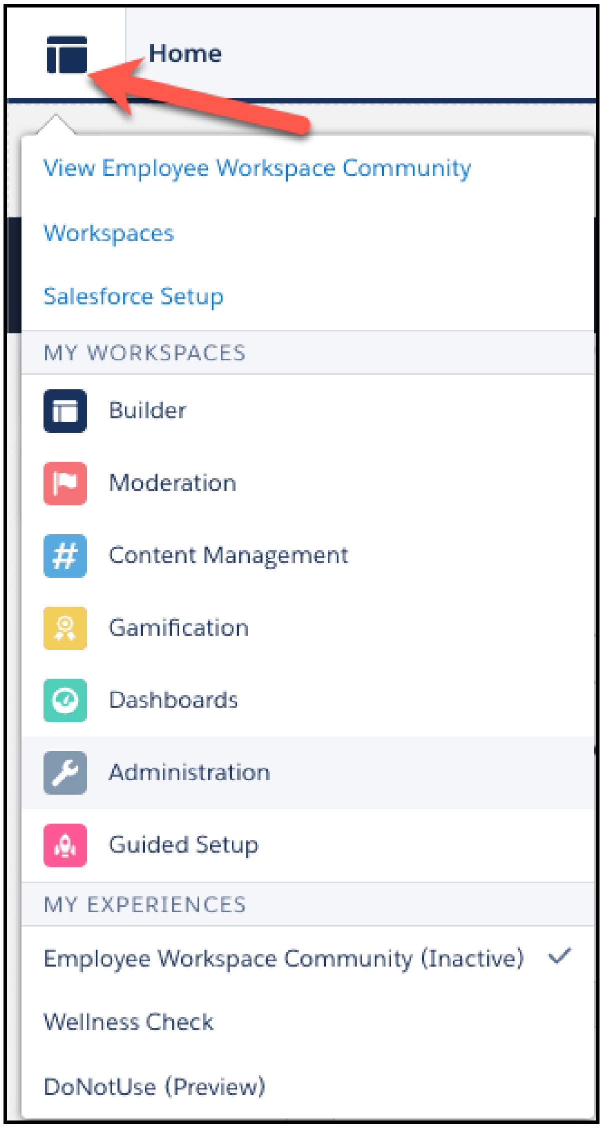
   Customize the look of your Employee Workspace site's navigation bar to fit your brand.

Customize the News Banner

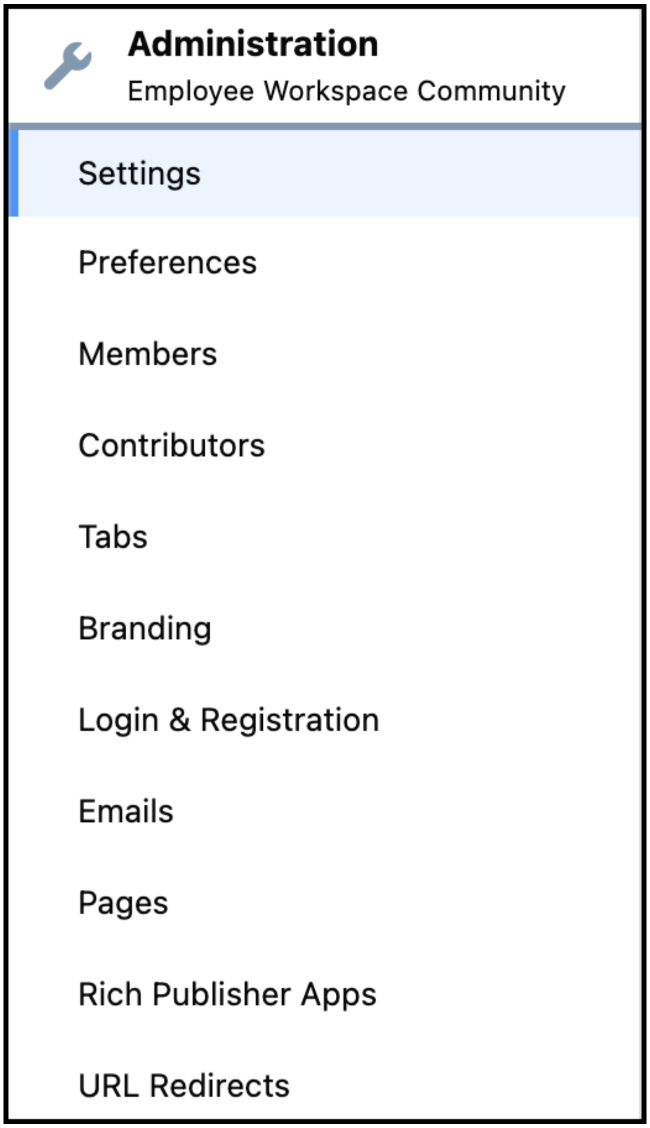
Deliver headline news to your employees within their Employee Workspace homepage. Create content for your Employee News Banner, and then add it to your Employee Workspace site.

Before you begin, deactivate your Employee Workspace Community in the Employee Workspace Administration Settings.

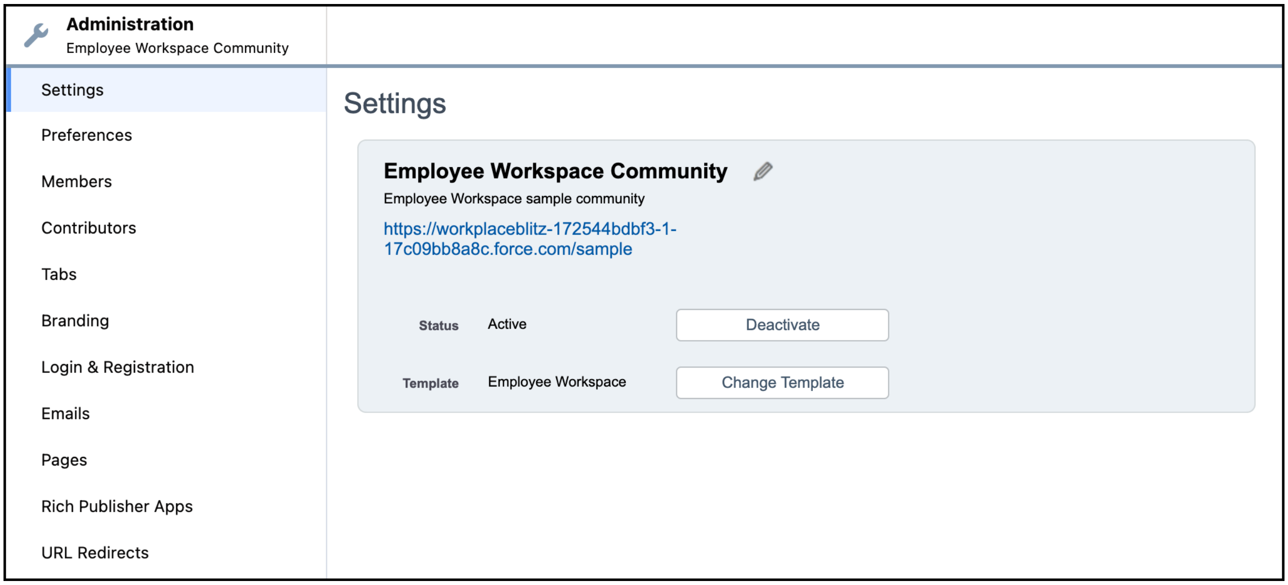
1. Click Experience Builder settings.



2. Select **Administration**.
3. In the Administration menu, select **Settings**.

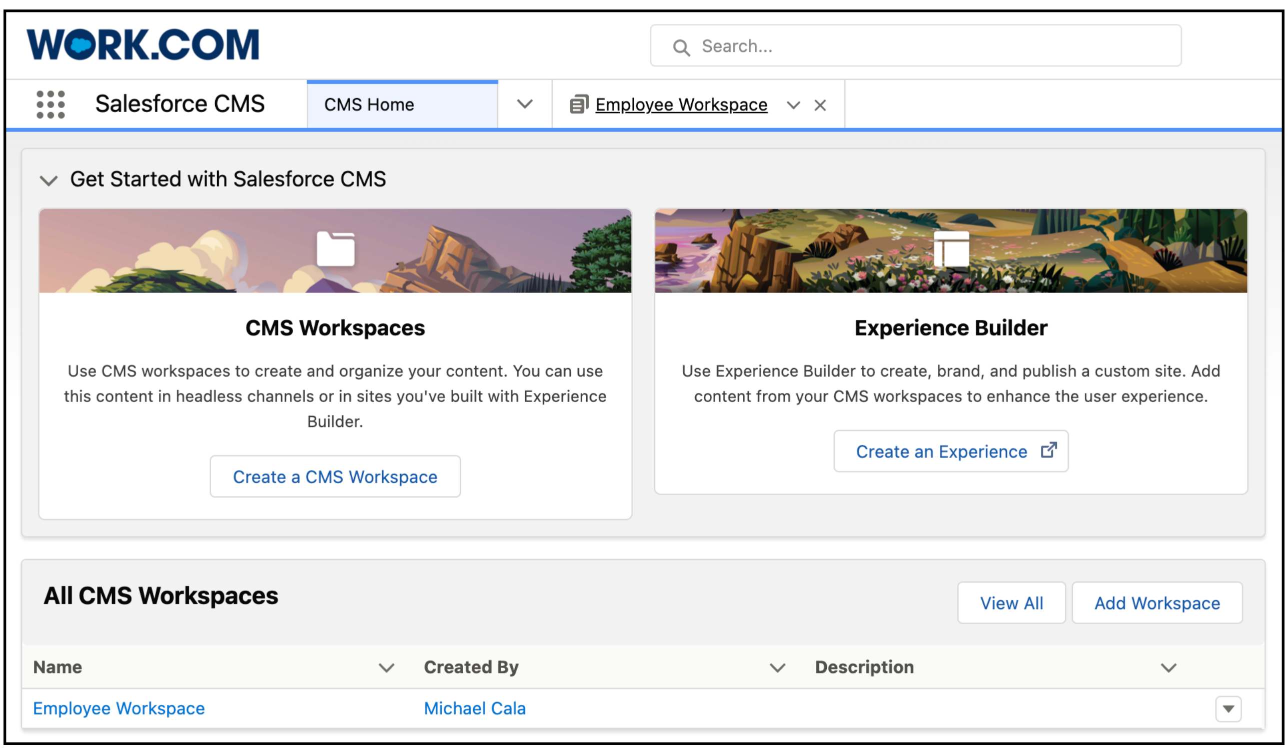


4. In the settings menu, click **Deactivate**.



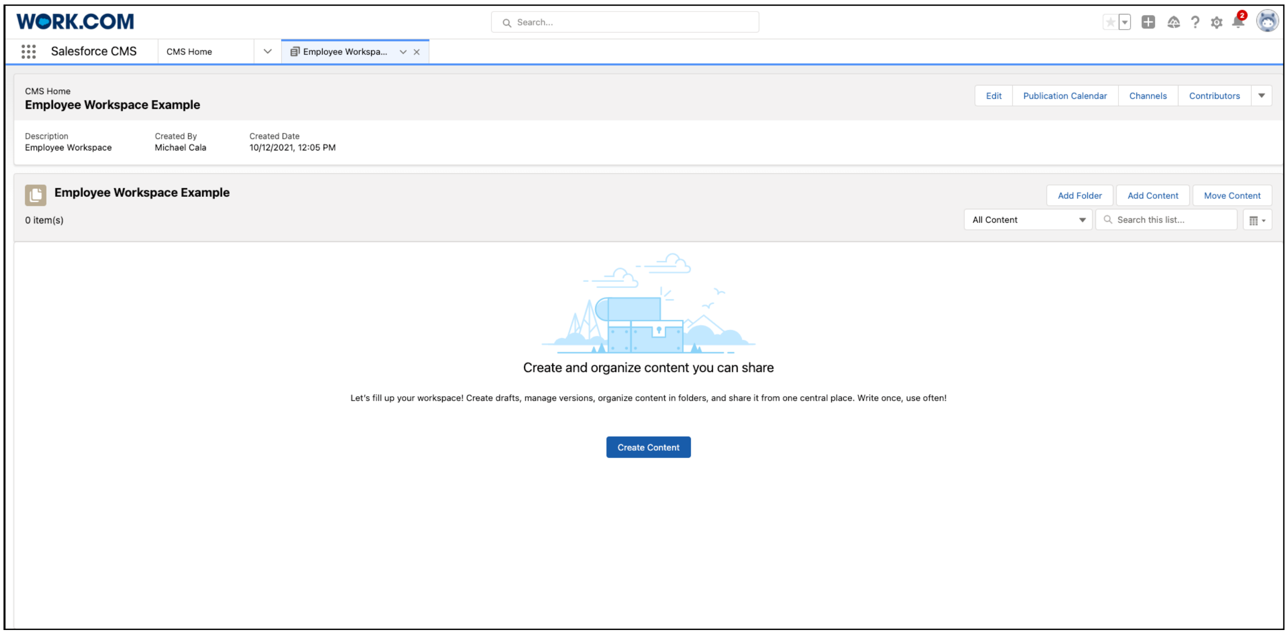
To customize your news banner, follow these steps. If you already created news banner content from the Employee Workspace Customizations on page 12 Help topic, proceed to step two.

1. Create news banner content.
   a. From the Salesforce App Launcher, launch the Digital Experiences app.
      The Digital Experiences Home tab opens.



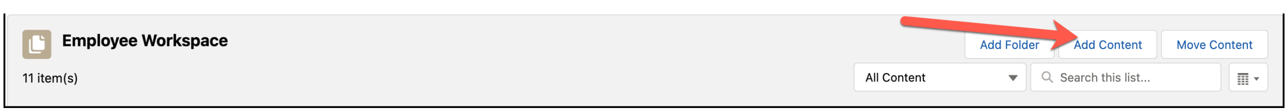
   b. From the All CMS Workspaces menu, select a workspace.

The Employee Workspace settings tab opens.



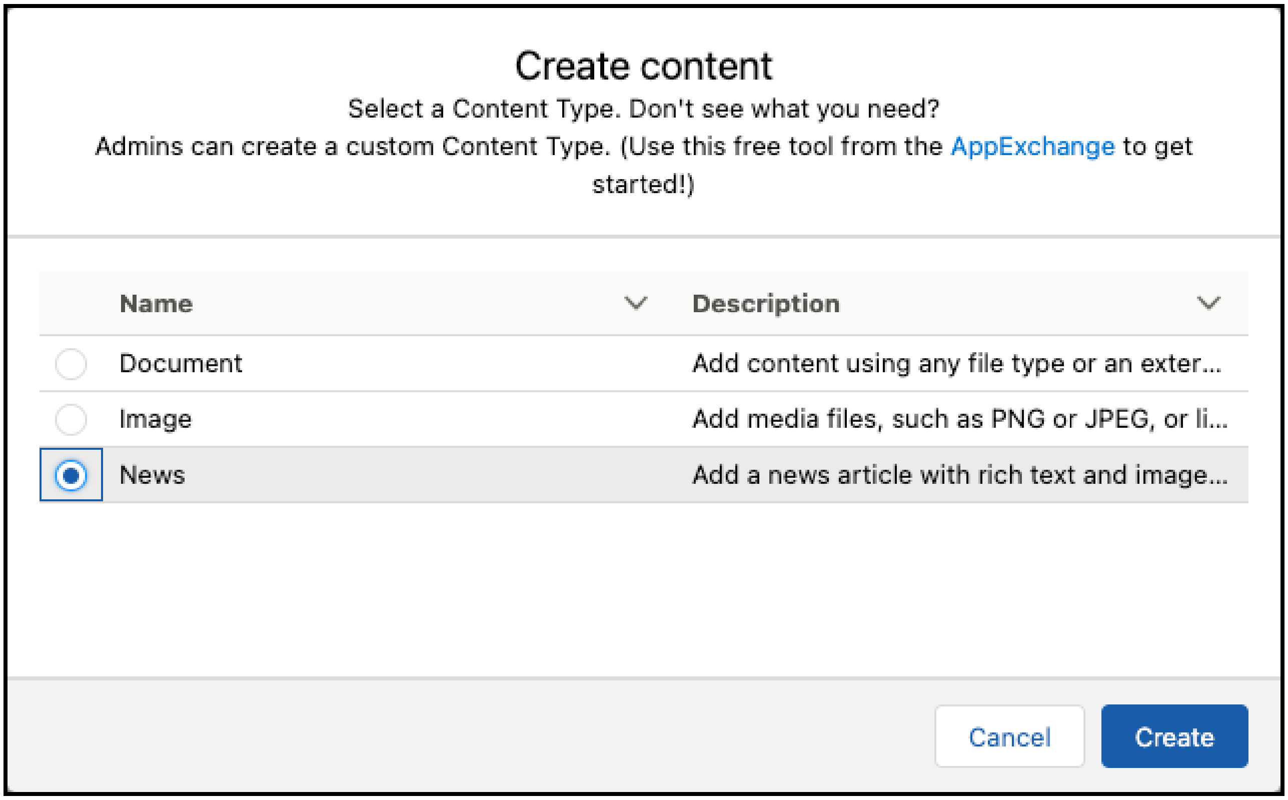
c. Click **Add Content**.

Or if you haven't created CMS content, click **Create Content**.



The Create Content window opens.

d. Select **News** as the content type, and then click **Create**.



e. In the Create tab, enter the required information in the text fields, and then click **Save Draft**.

f. Click **Publish**.

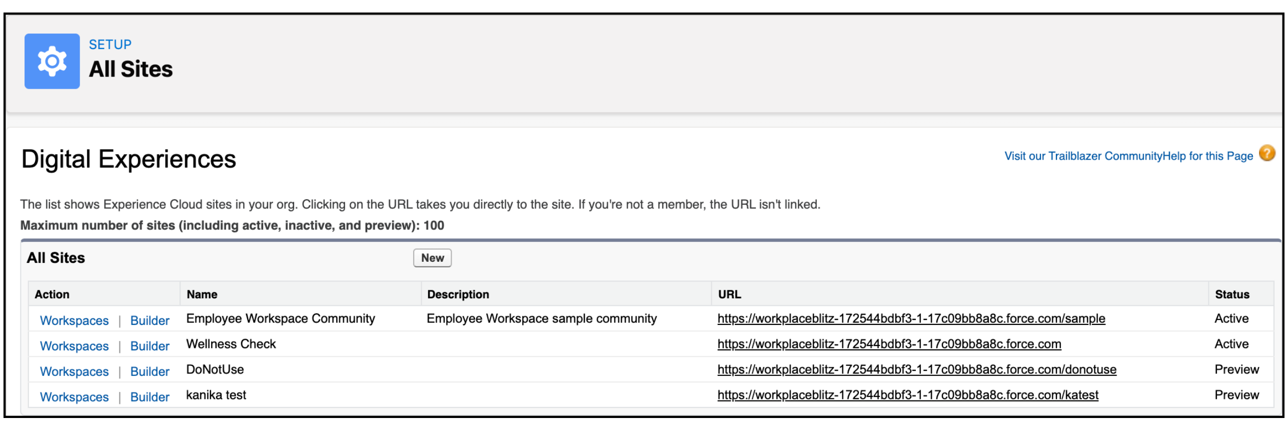
g. Save the unique identifier for the news content that you created.

The unique identifier is in the web page URL starting with 20Y.

`20Y5f000000tb2xEAA`

2. Add your news content to your Employee Workspace site banner.

a. From Setup, in the Quick Find box, enter `Sites`, and then select **All Sites**.
The All Sites setup menu opens.



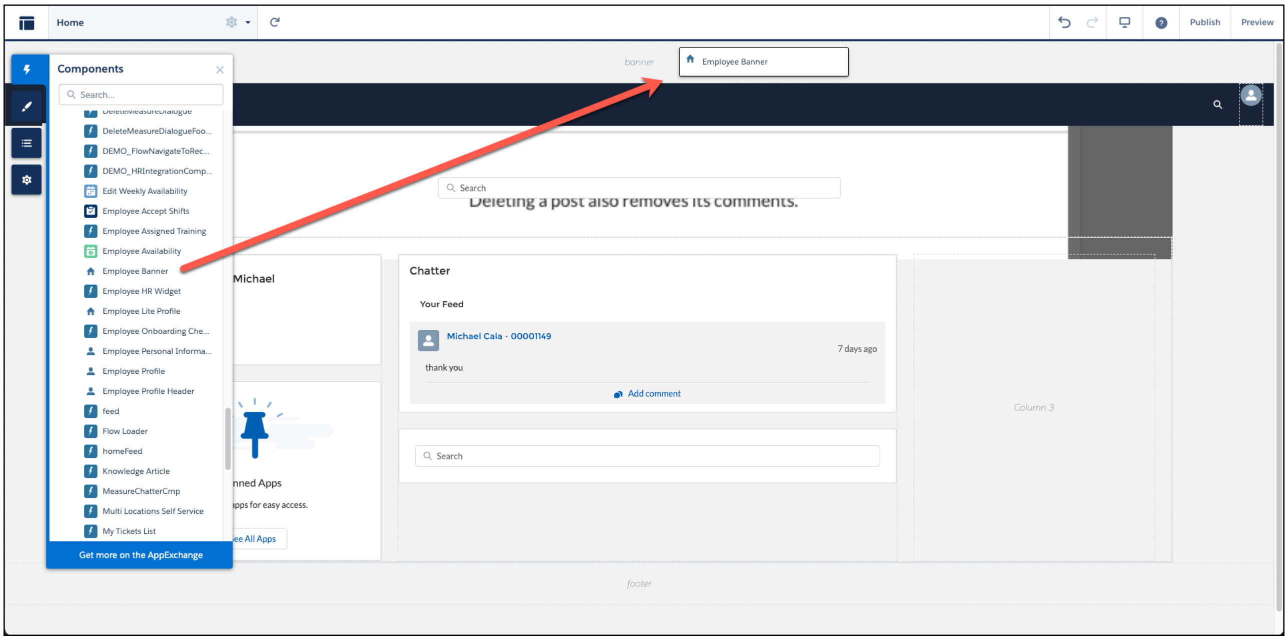
b. Click **Builder** next to Employee Workspace Community.

The Experience Builder opens.

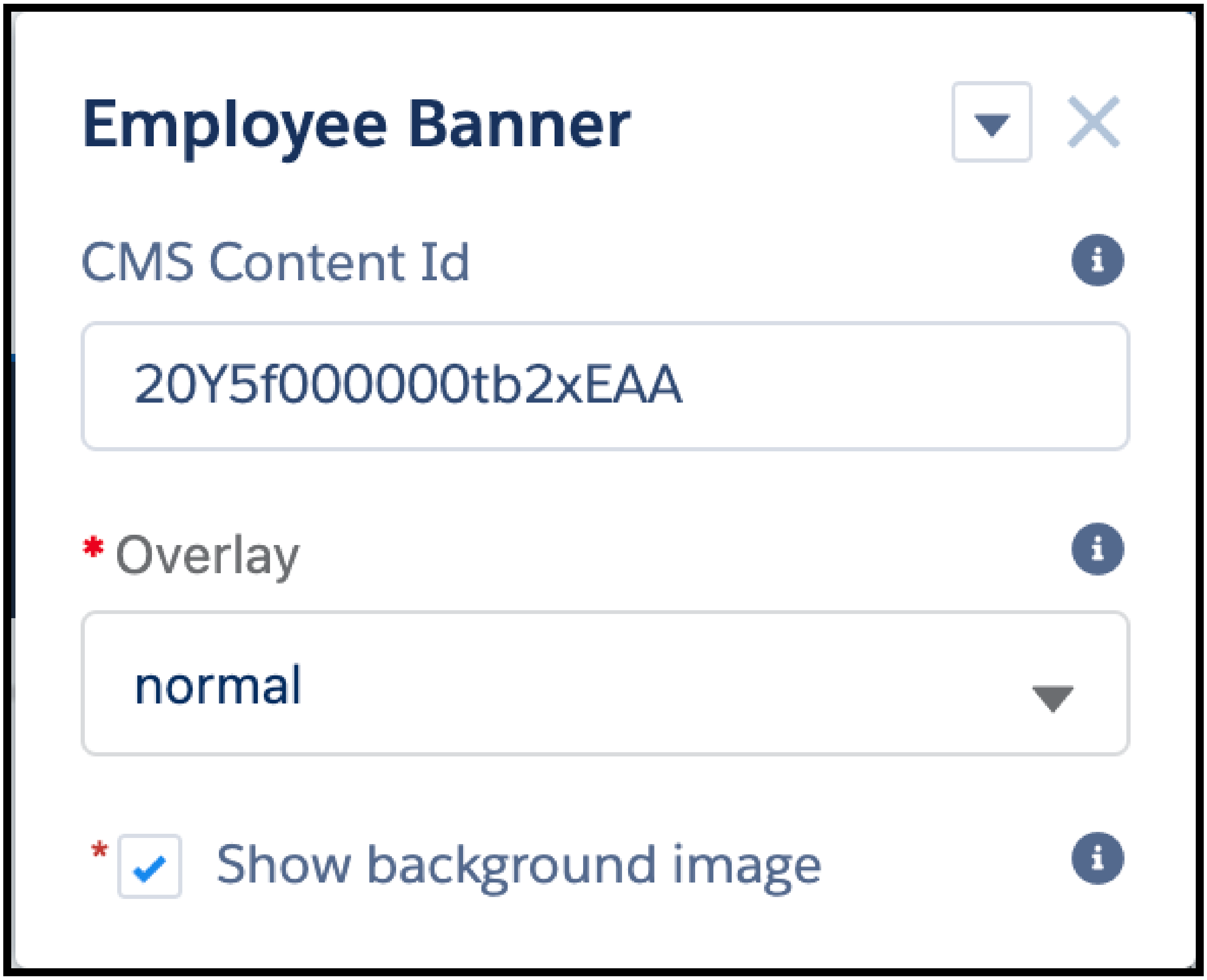
c. Click

.

d. In Components, under Custom Components, select **Employee Banner** and place it in the banner field of the Experience Builder.



e. From the banner field, click **Employee Banner**.
The Employee Banner settings window opens.



f. Set the CMS Content ID to the news content that you created.
   For example: `20Y5f000000tb2xEAA`
g. To show news content in the banner field, publish your Employee Workspace site.

Once complete, reactivate your Employee Workspace Community.

SEE ALSO:

Salesforce CMS

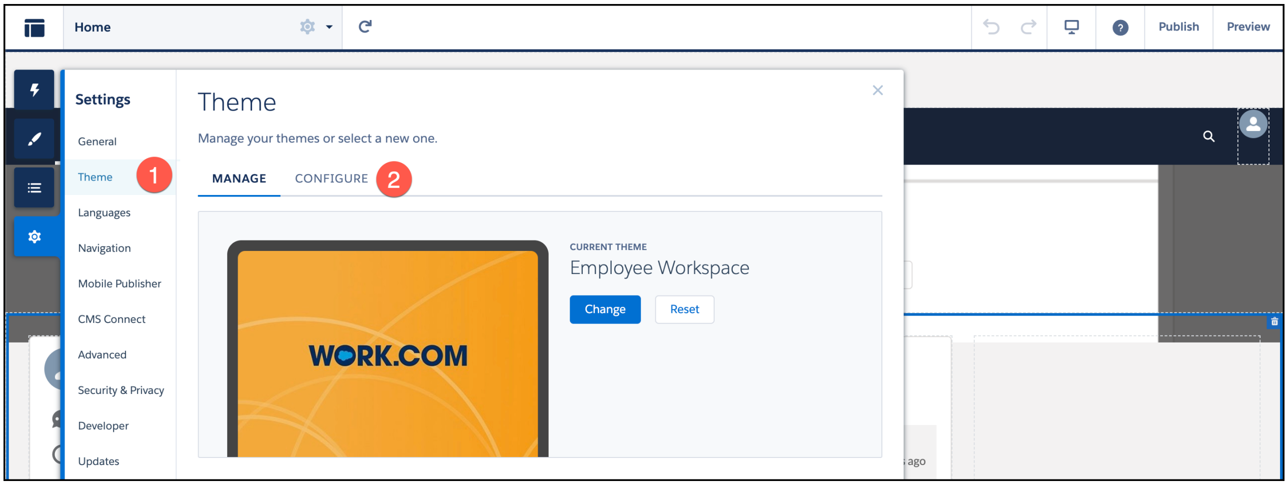
Customize the Hero Component

Customize the hero component layout for your Employee Workspace site. The hero component consists of a search box, background image, and title text on the Employee Workspace home page.

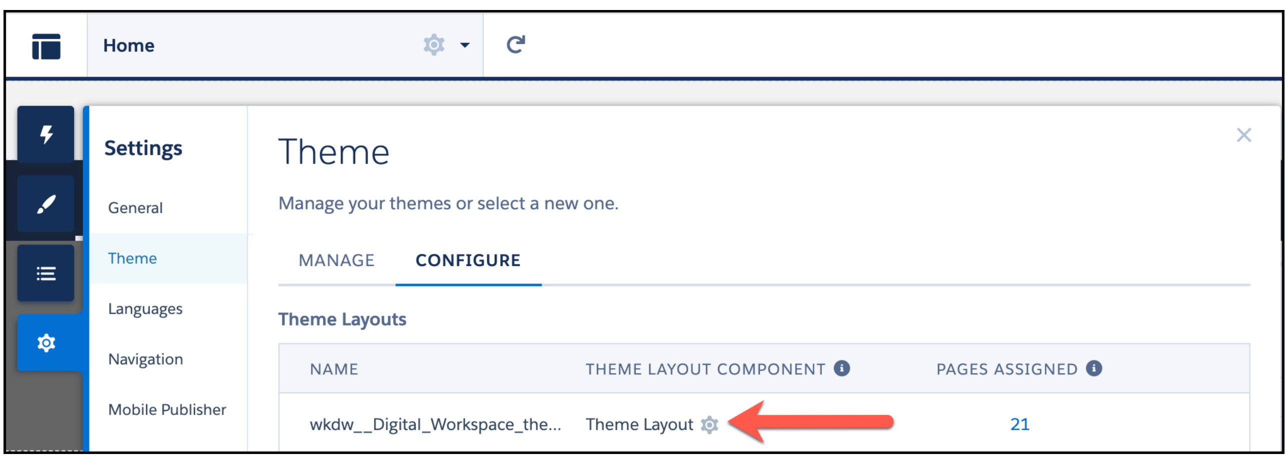
The hero component is the key visual element on a page that focuses your users' attention. The background image and title text are enabled by default. You can customize the default image, but not the title text. To customize the default hero image and disable the hero title text, follow these steps.

Tip: You also can disable both components or you can keep the title text and disable the default image.

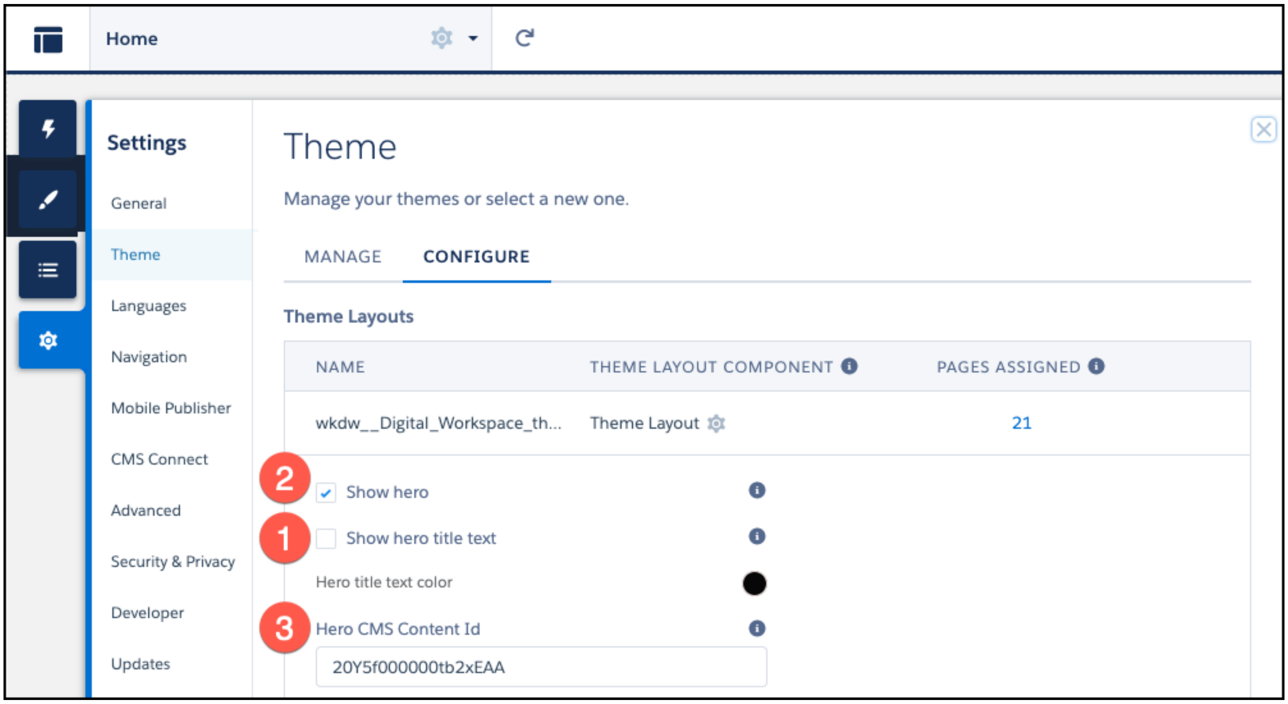
1. In the Experience Builder, click on the left sidebar.
   The Settings panel opens.
2. Select **Theme**, and then select **Configure**.



   The Theme Layout settings menu opens.
3. Under Theme Layout Component, click next to Theme Layout.



   The Theme Layout settings drop down menu opens.
4. Configure the hero component settings.
   a. Deselect **Show hero title text**.
   b. Ensure **Show hero** is selected.
   c. Enter a Hero CMS Content Id



Your hero configurations update dynamically in the Experience Builder.

SEE ALSO:

Customize Sites with Experience Builder

Add Search to Your Employee Workspace Page

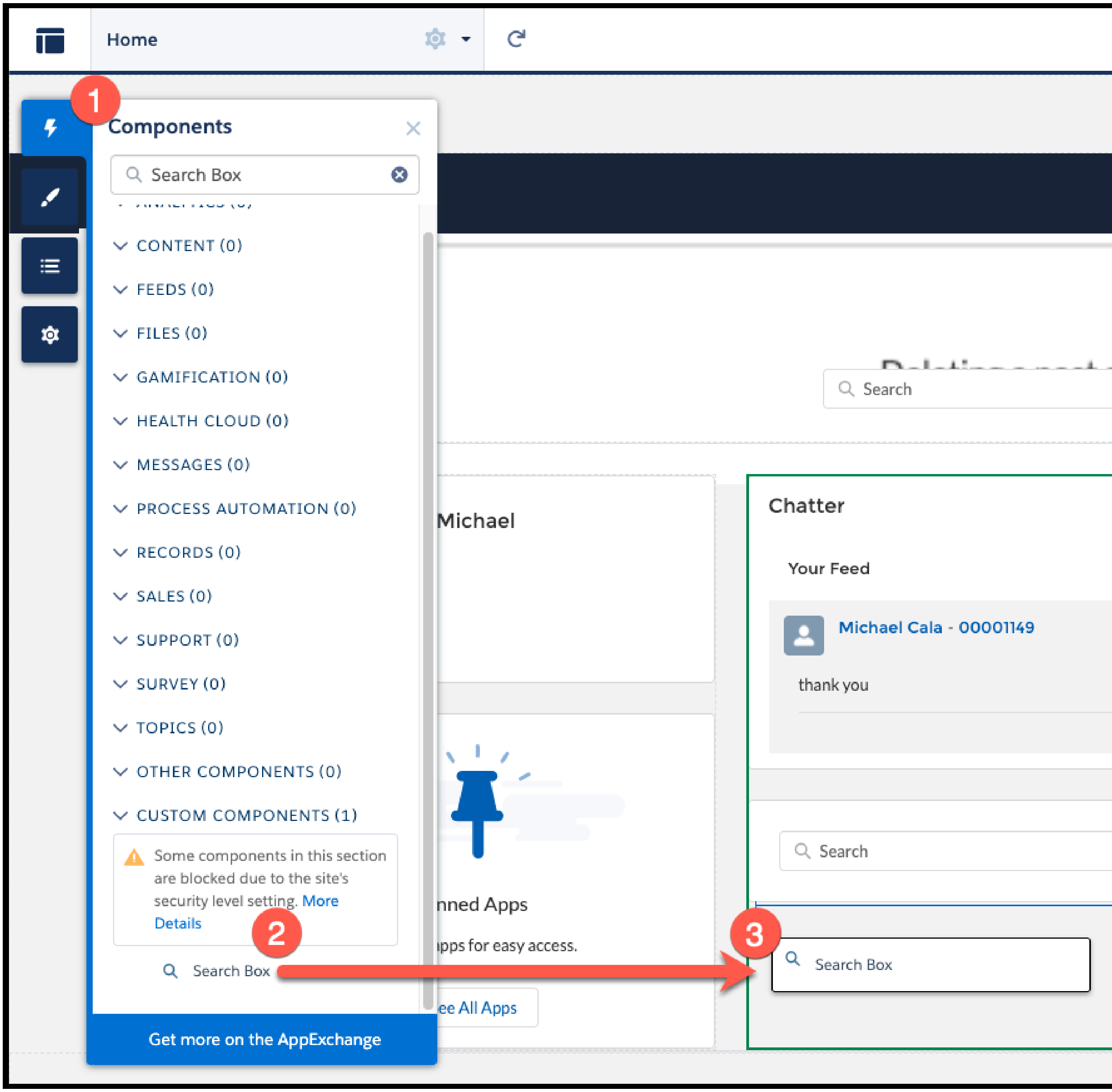
Add search anywhere on the Employee Workspace page with the search box component.

Employee Workspace contains a search component at the top of the home page by default. To add additional search components, take these steps.

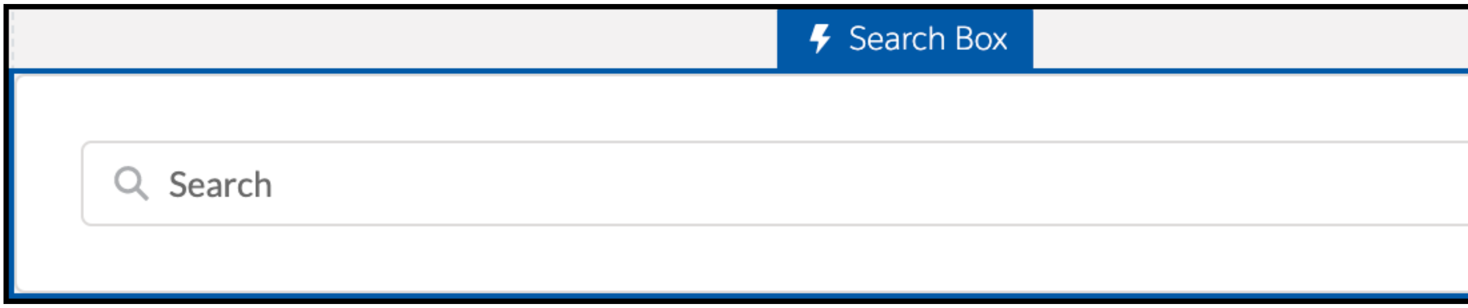
1. In the Experience Builder, click

   on the left sidebar.
2. In Components, under Custom Components, select **Search Box** and place it where you want it on the page.



The search box embeds into the Employee Workspace homepage.



SEE ALSO:

Salesforce CMS

Customize the Navigation Bar

Customize the look of your Employee Workspace site's navigation bar to fit your brand.

1. In the Experience Builder, click on the left sidebar, then click **Theme**.
2. Click **Configure**.
3. Click next to the Theme Layout.
4. Customize the navigation bar.

For desktops, you can customize the navigation bar's background color, the color of links on the navigation bar, and the hover color for links.

For mobile, you can customize the color of the navigation bar, the color of navigation items, and the color of the active navigation item. If you add more than five items to the navigation bar, the first four appear on the navigation bar, along with an overflow menu containing the other navigation items.

Add Default Apps to the Pinned App Widget

You can choose apps that you expect your employees to use most often and set them as default pinned apps. You can pin up to six apps in the Pinned Apps widget.

To get the connected app IDs:

1. From Setup, enter *Connected Apps* in the Quick Find box, then select **Manage Connected Apps**.
2. Find and click the connected app you want to set as a default pinned app.
3. In the browser address bar, locate the </connectedAppId.…. /> portion of the URL.

   Example URL format: https://<Salesforce base url>/lightning/setup/ConnectedApplication /page?[...]connectedAppId%3D**0H4R00000004isIKAQ**%26[...]

4. Copy the connected app ID. In the URL, app ID is between connectedAppId%3D and %26, and starts with **0H4**.

To set default pinned apps:

1. From Setup, enter *custom settings* in the Quick Find box, then select **Custom Settings**.
2. Find and click **Employee Workspace settings** and click **Manage**.
3. Click **New**.

4. In **Pinned Apps**, paste a comma-separated list of app IDs.
5. Click **Save**.

Note: To review limits on custom settings, see Custom Settings Limits and Considerations.

Create Your Branded App for Employee Workspace

Use Mobile Publisher to create and distribute a fully branded version of your Employee Workspace site that looks great on any mobile device. Get your app icon, your name, your colors, and—most importantly—your very own listing in Google Play and Apple App store.

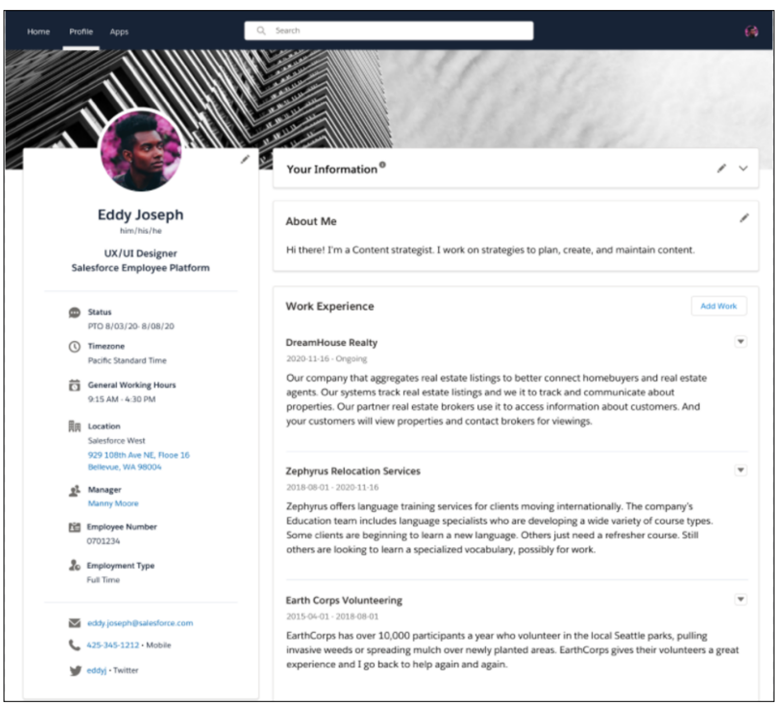
Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences.

Note: Your organization must license Salesforce Mobile Publisher in order to use the feature. Contact your Salesforce sales rep for more information.

To learn everything from how the Mobile Publisher program works from start to finish to what assets you need to create your branded app, see Mobile Publisher for Experience Cloud.

Work From Anywhere With Employee Workspace

Employee Workspace gives you access to all the tools and resources you need to work from anywhere and be productive. You can personalize your workspace to create a single pane of glass to manage your work life. Use Employee Workspace to access apps, stay informed with company news, collaborate with your colleagues, share your work experiences, manage your profile details, and more.



Log in to Employee Workspace

Log in to the Employee Workspace site from any device, from a desktop or from your mobile devices.

Get Started with Employee Workspace

Employee Workspace creates a home for you when you log in to your org. You can access all available apps, collaborate with your team, receive company communications, all from one place.

Manage Your Profile

Virtual collaboration is the new way to connect and communicate. Keep your profile up to date and let your colleagues know who you are and what you do.

Access Apps You Need to be Productive

Get access to all the apps available to you from one place and without having to log in again.

Find Answers and Solve Issues with Employee Concierge

If your organization has added Employee Concierge to your Employee Workspace site, search your Employee Workspace to find knowledge articles on a range of topics. If you can't find the information you need, open a ticket to request help from a support agent.

SEE ALSO:

Downloadable User Guides

Log in to Employee Workspace

Log in to the Employee Workspace site from any device, from a desktop or from your mobile devices.

You receive a welcome email when your system admin makes you a member of the Employee Workspace site. Use the link and login credentials in the email to get started with Employee Workspace. You can use the same link to log in and access Employee Workspace from any device. You can also launch **Employee Workspace** app from the App Launcher.

If your system administrator created a mobile app for the Employee Workspace site, ask for the app distribution details.

Get Started with Employee Workspace

Employee Workspace creates a home for you when you log in to your org. You can access all available apps, collaborate with your team, receive company communications, all from one place.

Collaborate With Your Peers

Connect with people and share business information securely in real time using Chatter, right from the Employee Workspace homepage.

Take Your Wellness Survey

If your admin installed the My Wellness component, you can verify your current wellness status and take any pending surveys from the Employee Workspace homepage. Otherwise, this option may not be available.

Manage Your Workplace Shifts

If your admin installed the components to manage workplace shift schedule, you can find shifts, confirm your availability, and view your on-site arrival pass from the Employee Workspace homepage. Otherwise, this option may not be available.

Collaborate With Your Peers

Connect with people and share business information securely in real time using Chatter, right from the Employee Workspace homepage.

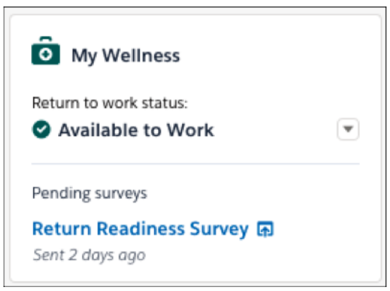
Use Chatter to collaborate, discuss, and grow together as a team.

- Select what you want to see in the feed. For example, select **What I Follow** to see updates for everything you follow, including posts from people you follow, groups you're a member of, and files and records you're following.
- To navigate to the group list page, click **See All Groups**. The **Groups** page lists all the groups that you're a member, owner, or manager of the group.
- Post, comment, create polls, or ask questions. When you post to your feed, everyone who follows you can view, comment on, like, or share the post.
- Click **Follow** on the Profile page of an employee to see their updates in your Chatter feed.

  Note: If the Profile page doesn't reflect the follow status correctly after you click **Follow** or **Unfollow**, refresh the page.

Take Your Wellness Survey

If your admin installed the My Wellness component, you can verify your current wellness status and take any pending surveys from the Employee Workspace homepage. Otherwise, this option may not be available.

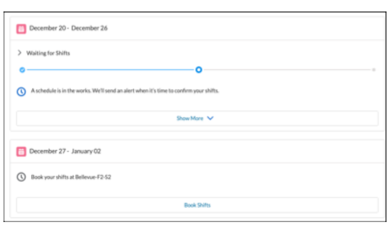


SEE ALSO:

Respond to Surveys
Wellness Check

Manage Your Workplace Shifts

If your admin installed the components to manage workplace shift schedule, you can find shifts, confirm your availability, and view your on-site arrival pass from the Employee Workspace homepage. Otherwise, this option may not be available.



SEE ALSO:

Shift Management for Work.com

Manage Your Profile

Virtual collaboration is the new way to connect and communicate. Keep your profile up to date and let your colleagues know who you are and what you do.

[Get to Know Your Colleagues]

Your profile gives your colleagues a great way to know you better.

[Share Your Work Experiences]

You can create a virtual resume and add, edit, or delete your current and past experiences. The virtual resume is a great way to showcase your expertise in organizational work and passion for community volunteering.

Get to Know Your Colleagues

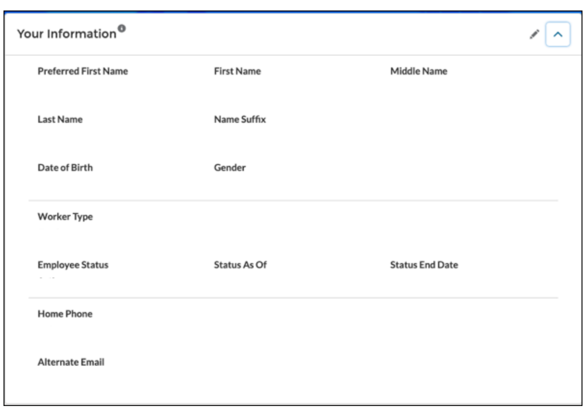
Your profile gives your colleagues a great way to know you better.

- Share your bio. Introduce yourself with a paragraph or two.
- Add your preference for what you want to be called by updating your preferred first name. If you don't specify your preference, the display name on your profile page uses your first name.
- Set your status. You can add an out-of-office message or brief work note here. Or you can put on your creative hat and let people know what you're up to.
- Indicate your availability. Specify your time zone, mention your work hours, and update your contact info so that your coworkers know when and how to contact you.
- Showcase your experience. Create a virtual resume and add your work experience, volunteer effort, and other relevant achievements.

Note: Only your system administrator can edit your photo and the banner displayed on your Profile page.

Edit Your Personal Information

You can edit your personal information in the Your Information card on the Profile page. This information is displayed only on your own profile page. When colleagues search and view your profile, they don't see this information.



In the current release, you can't edit picklist fields, such as `Gender`. Contact your system administrator for changes to fields you can't edit.

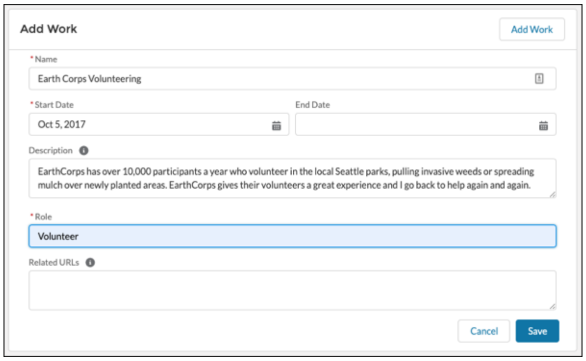
Share Your Work Experiences

You can create a virtual resume and add, edit, or delete your current and past experiences. The virtual resume is a great way to showcase your expertise in organizational work and passion for community volunteering.

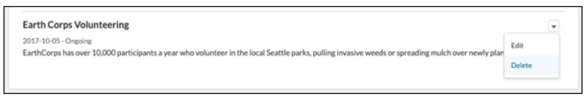
1. In the **Work Experience** section of the Profile page, click **Add Work**.
2. Add your responsibilities during the work experience and share your accomplishments. These are the required fields:
   - `Name`

- `Start Date`
- `Role`

3. Click **Save**.



You can edit or delete an experience from your virtual resume.

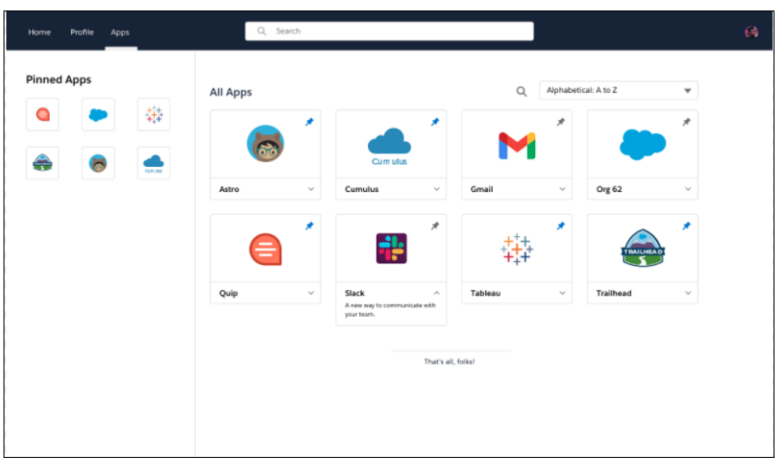


Access Apps You Need to be Productive

Get access to all the apps available to you from one place and without having to log in again.

You can pin up to six of your most-used apps for quick access. You can also access your pinned apps from the Employee Workspace homepage.

To pin an app, click the pin icon ( ). A icon indicates a pinned app.



Find Answers and Solve Issues with Employee Concierge

If your organization has added Employee Concierge to your Employee Workspace site, search your Employee Workspace to find knowledge articles on a range of topics. If you can't find the information you need, open a ticket to request help from a support agent.

USER PERMISSIONS

To access Employee Concierge in Employee Workspace:

- Permissions and licenses associated with any Employee Concierge persona

Search for Knowledge in Your Employee Workspace

Knowledge articles can cover a range of topics, including workplace policy, procedures, technical troubleshooting, and general FAQs. Use the Employee Workspace search to find articles.

View and Manage Your Tickets

Create, update, and track the progress of your support requests from My Tickets.

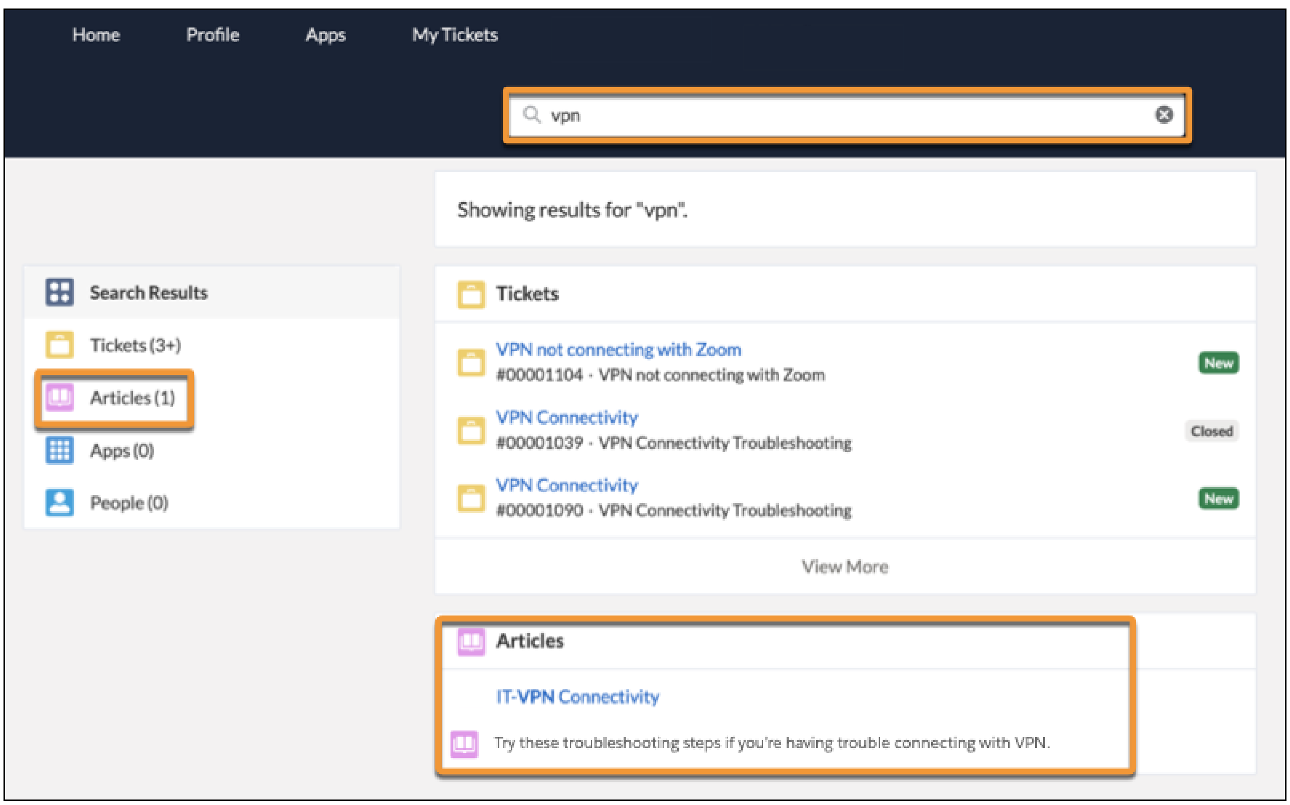
Get Started as an IT Agent with Agent Desk

Agent Desk gives IT Agents the tools they need to manage and resolve support tickets. Agent Desk is a Salesforce app included with Employee Concierge.

Search for Knowledge in Your Employee Workspace

Knowledge articles can cover a range of topics, including workplace policy, procedures, technical troubleshooting, and general FAQs. Use the Employee Workspace search to find articles.

Knowledge articles offer on-demand help and information. Knowledge articles appear in your search results when Employee Concierge is installed and configured for your Employee Workspace.

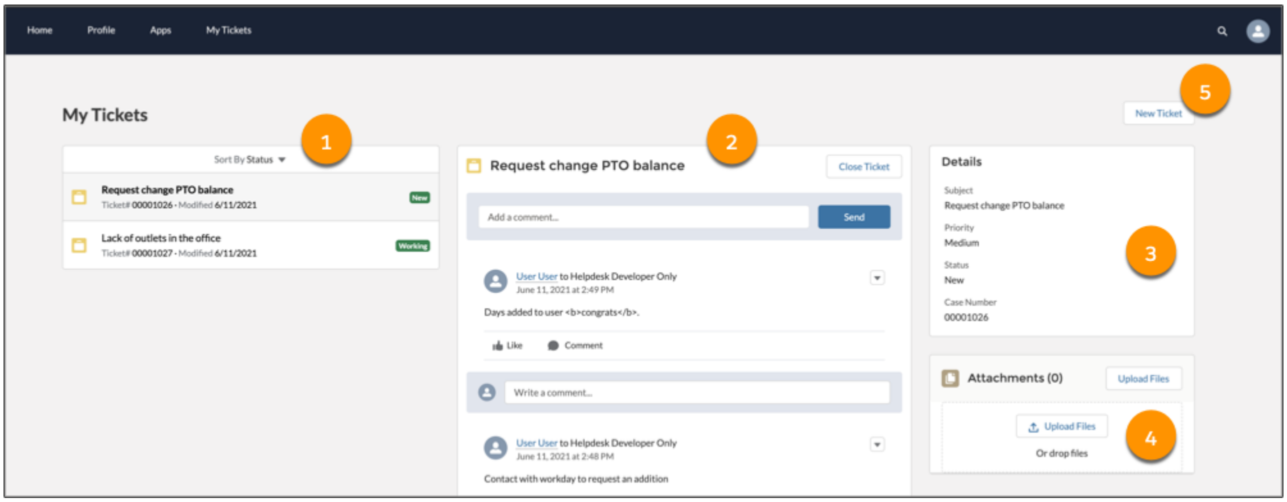


View and Manage Your Tickets

Create, update, and track the progress of your support requests from My Tickets.

To get to My Tickets, go to the My Tickets tab in your Employee Workspace.

My Tickets includes a sortable list of your tickets and their current statuses. Select a ticket from the list (1) to see the feed and history for that ticket (2), including status changes and comments from IT Agents. Use this feed to add a comment, attach a file, or close your ticket. The Details panel (3) displays important fields for your selected ticket. You can view and edit a list of files for the ticket in the Attachments panel (4). You can also create tickets (5) from My Tickets.



After you create one or more tickets, the tickets also appear in your Employee Workspace search results. You can search for tickets by keyword or ticket number.

Get Started as an IT Agent with Agent Desk

Agent Desk gives IT Agents the tools they need to manage and resolve support tickets. Agent Desk is a Salesforce app included with Employee Concierge.

USER PERMISSIONS

To access Agent Desk:

- Permissions and licenses associated with the Employee Concierge persona IT Agent

Navigate Agent Desk
Access Agent Desk and get comfortable with the app navigation.

Manage and Resolve Tickets with Agent Desk
Update, edit, and resolve support tickets from one screen in the Agent Desk app.

Create Tickets in Agent Desk
Employees can create their own tickets in Concierge, but IT Agents can also create tickets directly from Agent Desk.

Create and Manage Knowledge Articles for Employee Concierge
Write, edit, and publish the knowledge articles that appear in the Employee Concierge search results. Knowledge articles provide information to employees on any topic, including employee policies, technical troubleshooting steps, or general FAQs.

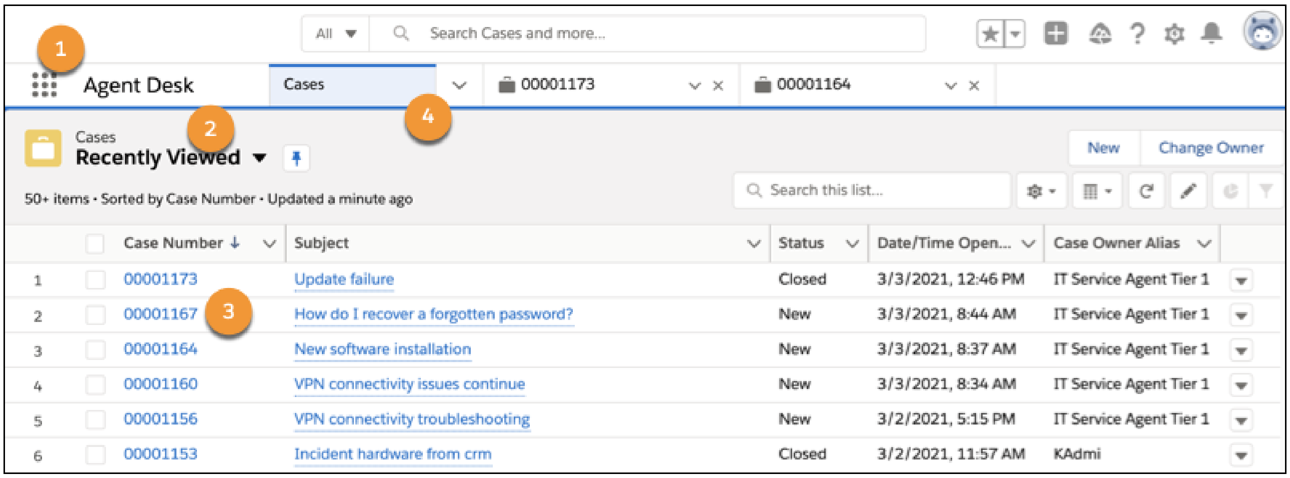
Agent Desk Considerations
To successfully manage and resolve support tickets with Agent Desk, there are a few considerations to mind.

Navigate Agent Desk

Access Agent Desk and get comfortable with the app navigation.

Use the App Launcher (1) to search for and open Agent Desk.

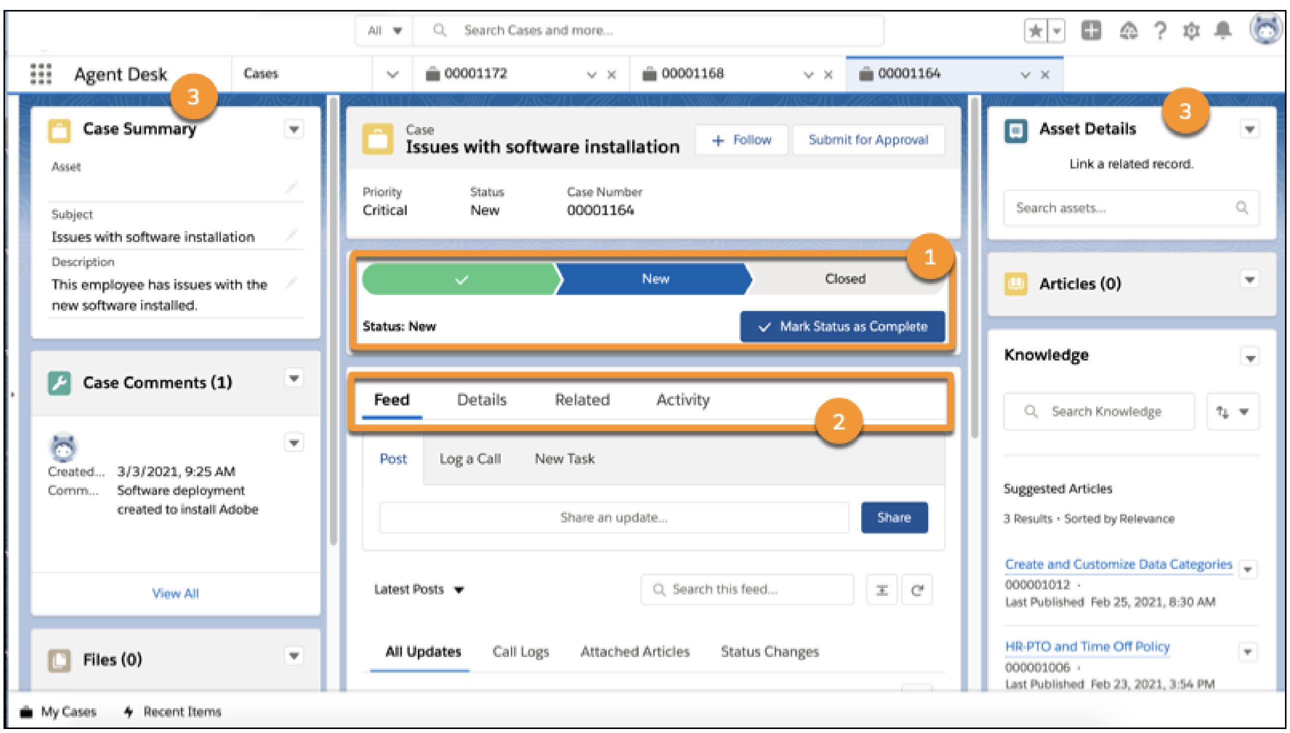
When you open Agent Desk, you have a list view for cases. You can switch between list views by clicking the dropdown menu immediately following the name of the current list view (2). The predefined list views available to you vary by your profile and the case sharing rules your Salesforce admin created. From any list view, click a case number (3) to open the ticket details. Use the console navigation (4) to open list views and records for other Salesforce objects, such as Knowledge or Assets.



Manage and Resolve Tickets with Agent Desk

Update, edit, and resolve support tickets from one screen in the Agent Desk app.

As a Salesforce console app, Agent Desk gives you multiple panels in a single window so you can manage and resolve tickets quickly. Console app navigation lets you open records as tabs, which means you can have several tickets or records open at the same time.



The center panel includes key information about the case record you're currently working with. Use the Path (1) to see and update the case status quickly. Use Feed, Details, Related Records, and Activity (2) to toggle between updating or commenting on the case. Side panels (3) provide more context and information related to the case or the employee.

For more information on console app navigation and options, review Salesforce Help and Trailhead. Talk to your Salesforce admin for information about Agent Desk and Employee Concierge.

SEE ALSO:

Agent Desk Considerations

My Support Tickets Page and Service Console Case Feed Access Solutions

My Support Tickets Page and Service Console Case Feed Access Solutions

Lightning Service Console

Manage and Work with Cases

Salesforce Trailhead: Service Cloud Agent Experience

Create Tickets in Agent Desk

Employees can create their own tickets in Concierge, but IT Agents can also create tickets directly from Agent Desk.

1. From the Cases list view, click **New**.
2. Select a type for the new case (if available), then click **Next**.
3. Fill out the required fields.
4. Upload any files that you want to attach to the ticket, such as a screenshot.

   There's no limit to the number of files that you can attach to a ticket. You can upload up to 10 files at a time.
5. Save your changes.

From the inline dropdown menu for each case, you can also edit or delete the case and change the case owner.

Note: When you create a case on behalf of an employee, you must populate both the Account Name and Contact Name fields with the employee's person account.

Create and Manage Knowledge Articles for Employee Concierge

USER PERMISSIONS

To author and manage knowledge articles for Employee Concierge:

- Permissions and licenses associated with the IT Agent, Knowledge Author, or Employee Workspace Admin personas for Employee Concierge

Write, edit, and publish the knowledge articles that appear in the Employee Concierge search results. Knowledge articles provide information to employees on any topic, including employee policies, technical troubleshooting steps, or general FAQs.

1. From the App Launcher, search for and select **Knowledge**.
2. Click **New**.
3. Select an article record type (if available). Click **Next**. Record types determine what information is included in an article, and are managed by your Employee Workspace Admin.
4. Draft the article. Use the help text for guidance.
5. Click **Save**.
6. Select the **Draft Articles** list view.
7. Use the checkbox to select your next article.
8. Click **Publish**.

9. Select either Publish Now or Scheduled publication on a future date.
10. Click **Publish**.

SEE ALSO:

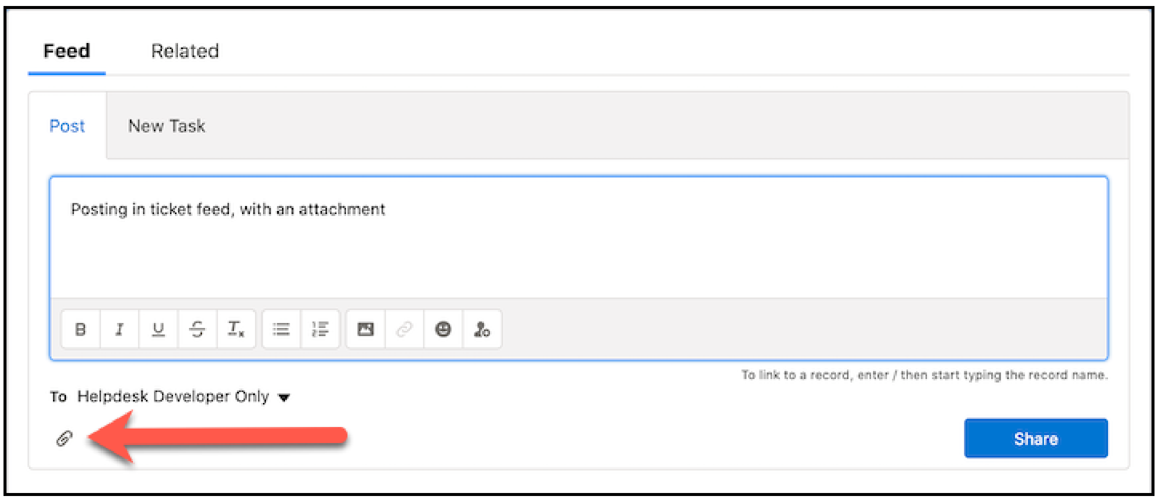
Create and Edit Articles

Authoring Actions in Lightning Knowledge

Agent Desk Considerations

To successfully manage and resolve support tickets with Agent Desk, there are a few considerations to mind.

- When you post a new comment to a ticket or when you comment on an existing post of a ticket, you can't insert inline images by using the Image button. Instead, upload images by clicking the paper clip icon.



- You can upload up to 10 files when you create a new post to a ticket.
- You can upload only one file when you add a comment to an existing post of a ticket.