**Declarative development for platform app builders**

Exercise Guide

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Intro: Training Org Login

1. Navigate to the Salesforce login page.

A. Open an internet browser.

B. Enter login.salesforce.com into the browser’s address bar.

C. Press Enter.

2. Log in with your username and password.

A. Enter your username and password.

User Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Password: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

B. Click Log in to Salesforce.

3. Update your Chatter profile with your name and email.

### A. Click Admin User | My Profile.

### B. Click the pencil icon next to Contact.

### C. Enter your email information.

i. Email: (your personal email)

### D. Click the About tab and enter your name.

i. First Name: (your first name)

ii. Last Name: (your last name)

### E. Click Save All.

4. Download the exercise files.

A. Click the Documents tab.

B. Select Shared Documents from the Folder picklist and click Go!

C. Click the App Builder Lab Files file.

D. Click View File.

E. In the File Download dialog box, click Save.

F. In the Save dialog box, select to save the file to the desktop, and click Save.

G. Right-click the downloaded .zip file and select Extract All.

1-1: Create a Sandbox

1. Create a Developer sandbox named TestOrg.

A. Click Setup | Deploy | Sandboxes.

B. Click New Sandbox and enter the details.

i. Name: TestOrg

ii. Description: Sandbox used to configure and test changes.

C. In the Developer section, click Next.

D. On the Sandbox Option page, click Create.

Note: The time it takes to complete the copy will depend on the length of the queue at the time requested. You will receive an email letting you know when it has been completed.

2-1: Evaluate AW Computing’s Data Model with Schema Builder

Use the AW Computing organization to answer questions about the sharing model.

1. How many custom objects have been built at AW Computing?

2. Which custom object(s) has no relationship with any other objects (other than User)?

3. What is the relationship between Position and Candidate?

4. What fields are required on the job application?

5. Which fields relate Position to the User object? Are they unique to Position, or common to all objects?

6. What is the formula field on the shipment object being used for?

Answers for 2-1: Evaluate AW Computing’s Data Model with Schema Builder

1. How many custom objects have been built at AW Computing?

Six

1. Which custom object(s) has no relationship with any other objects (other than User)?

Opportunity Pipeline Snapshot

1. What is the relationship between Position and Candidate?

There is no direct relationship; however, a many-to-many relationship between Position

and Candidate is effectively implemented by the presence of the intervening Job

Application custom object.

1. What fields are required on the Job Application?

Candidate, Created By, Currency, Last Modified By, Owner, and Position

1. Which fields relate Position to the User object? Are they unique to Position, or common to all objects?

Created By (common to all), Hiring Manager (unique), Last Modified By (common to

all), Owner (common to all)

1. What is the formula field on the shipment object being used for?  
   Concatenating the shipping address from multiple other fields

2-2: Create a Review Custom Object

1. Create a review custom object.

A. Click Setup | Create | Objects.

B. Click New Custom Object.

i. Label: Review

ii. Plural Label: Reviews

iii. Object Name: Review (This field auto-populates.)

iv. Record Name: Review Number

v. Data Type: Auto Number

vi. Display Format: REV-{0000}

vii. Starting Number: 0

viii. Allow Reports: Select

ix. Allow Activities: Select

x. Track Field History: Select

xi. Deployment Status: Select Deployed

xii. Allow Search: **Select**

xiii. Add Notes & Attachments related list to default page layout: Select

xiv. Launch New Custom Tab Wizard after saving this custom object: Deselect

C. Click Save.

2-3: Create a Job Posting Site Object

1. Create a job posting site object with a Job Posting Site URL, a Status picklist, a Technical Site checkbox, and a Description text area**.**

A. Click Setup | Create | Objects.

B. Click New Custom Object.

i. Label: Job Posting Site

ii. Plural Label: Job Posting Sites

iii. Object Name: Job\_Posting\_Site (This field auto-populates.)

iv. Record Name: Site Name

v. Data Type: Text

vi. Allow Reports: Select

vii. Allow Activities: Select

viii. Track Field History: Select

ix. Deployment Status: Select Deployed

x. Allow Search: Select

xi. Add Notes & Attachments related list to default page layout: Select

xii. Launch New Custom Tab Wizard after saving this custom object: Select

C. Click Save.

D. Create a job posting site tab.

i. Use these criteria to configure the New Custom Object Tab:

i. Object: Job Posting Site

ii. Tab Style: Click the magnifying glass and select Real Estate Sign.

ii. Click Next.

iii. Leave the profiles as is and click Next.

iv. In the Add to Custom Apps section:

i. Deselect Include Tab and Select Recruiting App.

ii. Append tab to users’ existing personal customizations: Select

iii. Click Save.

E. On the Job Posting Site object in the Custom Fields & Relationships section, click New.

i. Data Type: URL

ii. Click Next.

iii. Field Label: Job Posting Site URL

iv. Field Name: Job\_Posting\_Site\_URL (This field auto-populates.)

v. Click Next.

vi. Leave Field-Level Security defaults and click **Next**.

vii. Leave Page Layout defaults.

F. Click Save & New.

i. Data Type: Picklist

ii. Click Next.

iii. Field Label: Status

iv. Select: Enter values for the picklist, with each value separated by a new line:

v. Values field: For this exercise, type Active and Inactive.

vi. Click Next.

G. To accept the defaults for field-level security, click Next.

H. Accept the defaults to add reference field to Page Layouts by clicking **Save & New**.

I. Configure the new custom field:

i. Data Type: Checkbox

ii. Click Next.

iii. Field Label: Technical Site

iv. Field Name: Technical\_Site (This field auto-populates.)

v. Click Next.

J. To accept the defaults for field-level security, click Next.

K. To accept the defaults to add field to Page Layouts, click **Save & New.**

L. Configure the new custom field:

i. Data Type: Text Area

ii. Click Next.

iii. Field Label: Description

iv. Field Name: Description (This field auto-populates.)

v. Click Next.

vi. Click Next.

M. Click Save.

2-4: Create a Job Posting as Junction Object

1. Create a job posting as a custom junction object.

A. Click Setup | Create | Objects.

B. Click New Custom Object.

i. Label: Job Posting

ii. Plural Label: Job Postings

iii. Object Name: Job\_Posting (This field auto-populates.)

iv. Record Name: Job Posting Number

v. Data Type: Auto Number

vi. Display Format: JOBPOST-{0000}

vii. Starting Number: 0

viii. Allow Reports: Select

ix. Allow Activities: Deselect

x. Track Field History: Deselect

xi. Deployment Status: Select Deployed

xii. Allow Search: Deselect

xiii. Add Notes & Attachments related list to default page layout: Deselect

xiv. Launch New Custom Tab Wizard after saving this custom object: Deselect

C. Click Save.

2. Create the master-detail relationships of Job Posting with Job Posting Site and Position.

A. In the Custom Fields & Relationships related list, click New.

i. Data Type: Master-Detail Relationship

ii. Click Next.

iii. Related to: Position

iv. Click Next.

v. Field Label: Position

vi. Field Name: Position (This field auto-populates.)

vii. Click Next.

B. To accept the defaults for field-level security, click Next.

C. To accept the defaults to add reference field to Page Layouts, click Next.

D. To accept the defaults to add the related list to the page layout, click Save & New.

i. Data Type: Master-Detail Relationship

ii. Click Next.

iii. Related to: Job Posting Site

iv. Click Next.

v. Field Label: Job Posting Site

vi. Field Name: Job\_Posting\_Site (This field auto-populates.)

vii. Click Next.

E. To accept the defaults for field-level security, click Next.

F. To accept the defaults to add reference field to Page Layouts, click Next.

G. To accept the defaults to add the related list to the page layout, click Save.

3. Modify the Position page layout to include fields from the Job Posting Site.

A. Select Setup | Create | Objects | Position.

B. Scroll down to the Page Layouts related list.

C. Click Edit Next to Position Layout.

D. Scroll down to the Job Posting related list.

E. Click the wrench icon in the header to edit.

F. From the Selected Fields section, select Job Posting: Job Posting Number.

G. Click Remove.

H. From the Available Fields section, select Job Posting Site: Site Name, Job Posting Site: Status, and Job Posting Site: Technical Site.

I. Click Add.

J. Click OK.

K. Click Save.

4. Modify the Job Posting Site page layout to include fields from the Position.

A. Select Setup | Create | Objects | Job Posting Site.

B. Scroll down to the Page Layouts related list.

C. Click Edit Next to Job Posting Site Layout.

D. Scroll down to the Job Posting related list.

E. Click the wrench icon in the header to edit.

F. From the Selected Fields section, select Job Posting: Job Posting Number.

G. Click Remove.

H. From the Available Fields section, select Position: Title, Position: Status.

I. Click Add.

J. Click OK.

K. Click Save.

5. Create a Position record, Job Posting Site record, and Job Posting record. Look at the related list on the position page layout.

2-5: Create a Self Relationship with Position

1. Create a lookup relationship with Position.

A. Click Setup | Create | Objects | Position.

B. Create Custom Fields & Relationships: Click New

i. Data Type: Lookup Relationship

ii. Click Next

iii. Related To: Position

iv. Click Next

v. Field Label: Related Position

vi. Field Name: Related Position (This field auto-populates.)

vii. Click Next.

C. To accept the defaults for field-level security, click Next.

D. To accept the defaults to add reference field to Page Layouts, click Next.

i. Related List Label: Related Positions

ii. Click Save.

2. Add a lookup filter by department.

A. Click Edit next to the Related Position field.

B. Under the Lookup Filter section, click the **Show Filter Settings** link.

C. Click the magnifying glass to select the field.

i. Field: Related Position: Department

ii. Click Insert.

iii. Operator: equals

iv. Value/Field: Field

v. Click the magnifying glass to select another field.

vi. Field: Position: Department

vii. Click Insert.

viii. Field: Position: Record Id

ix. Click Insert.

x. Operator: **not** equal to

xi. Value/Field: Field

xii. Click the magnifying glass to select another field.

xiii. Field: **Related** Position: Record Id

xiv. Click Insert.

xv. Filter Type: Select Required.

xvi. Filter Type: If it doesn’t, display this error message on save: The related position must be in the same department. You cannot relate a position to itself.

xvii. Click Save.

2-6: Create Custom Recruiting Fields

1. Create custom recruiting fields.

1. Click **Setup | Create | Objects | Review**.
2. In the Custom Fields & Relationships related list, click **New**.
3. Select the Data Type Number, then click Next.

i. Field Label: Cultural Fit

ii. Length: 1

iii. Decimal Places: 0

iv. Field Name: Cultural\_Fit (This field auto-populates.)

v. Help Text: How well does the candidate fit into our company culture? Use a scale of 1 (lowest) to 5 (highest).

vi. Click Next.

vii. Click Next.

viii. Click Save & New.

1. Select the Data Type Text Area, then click Next.

i. Field Label: Cultural Comments

ii. Field Name: Cultural\_Comments (This field auto-populates.)

iii. Click Next.

iv. Click Next.

v. Click Save & New.

1. Select the Data Type Number, then click Next.

i. Field Label: Leadership Skills

ii. Length: 1

iii. Decimal Places: 0

iv. Field Name: Leadership\_Skills (This field auto-populates.)

v. Help Text: Does the candidate demonstrate potential to be a leader? Use a scale of 1 (lowest) to 5 (highest).

vi. Click Next.

vii. Click Next.

viii. Click Save & New.

1. Select the Data Type Text Area, then click Next.

i. Field Label: Leadership Comments

ii. Field Name: Leadership\_Comments (This field auto-populates.)

iii. Click Next.

iv. Click Next.

v. Click Save & New.

1. Select the Data Type Number, then click Next.

i. Field Label: Experience

ii. Length: 1

iii. Decimal Places: 0

iv. Field Name: Experience (This field auto-populates.)

v. Help Text: How much experience does the candidate have? Use a scale of 1 (lowest) to 5 (highest).

vi. Click Next.

vii. Click Next.

viii. Click Save & New.

1. Select the Data Type Text Area, then click Next.

i. Field Label: Experience Comments

ii. Field Name: Experience\_Comments (This field auto-populates.)

iii. Click Next.

iv. Click Next.

v. Click Save & New.

1. Select the Data Type Checkbox, then click Next.

i. Field Label: Recommend for Hire

ii. Field Name: Recommend\_for\_Hire (This field auto-populates.)

iii. Help Text: Is it your recommendation that we hire this candidate?

iv. Click Next.

v. Click Next.

vi. Click Save & New.

1. Select the Data Type Text Area, then click Next.

i. Field Label: Reason Recommended

ii. Field Name: Reason\_Recommended (This field auto-populates.)

iii. Click Next.

iv. Click Next.

v. Click Save & New.

1. Select the Data Type Lookup Relationship, then click Next.

i. Related To: Interviewer

ii. Field Label: Interviewer

iii. Field Name: Interviewer (This field auto-populates.)

iv. Click Next.

v. Click Next.

vi. Click Next.

vii. Click Save & New.

1. Select the Data Type Master-Detail Relationship¸ then click Next.

i. Related To: Job Application

ii. Click Next.

iii. Field Label: Job Application

iv. Field Name: Job\_Application (This field auto-populates.)

v. Click Next.

vi. Click Next.

vii. Click Next.

viii. Click Save.

2-7: Insert with Data Loader

1. Upload Positions by downloading the legacy position data.

A. If you haven’t already downloaded the files from Shared Documents, please do so now by following the steps on the Intro: Training Org Login page within this document.

2. Upload the legacy position records.

A. Double-click the Apex Data Loader icon on the desktop.

If the Data Loader is not already installed, download it from Setup | Data Management | Data Loader.

B. Click Upsert.

C. Click Password Authentication.

D. Log in by entering your Username and Password.

i. Click Login.

E. Select Position from the list of objects.

F. Select the Positions.csv file.

i. Click Browse.

ii. Browse to Positions.csv in the App Builder Lab Files folder and click Open.

iii. Click Next. A message saying “Initialization Succeeded. Your operation will contain 10 records” will appear.

iv. Click OK.

G. Select Legacy\_Position\_Number\_\_c as the key field to use with the Position\_\_c field and click Next.

H. Select Legacy\_Employee\_Number\_\_c as the key field to use with the Hiring\_Manager\_\_r field.

I. Leave all others blank and click Next.

J. Create and save the mapping file for the position object.

i. Click Create or Edit a Map.

ii. Click Auto-Match Fields to Columns.

iii. Verify that the correct columns from the Positions.csv file are matched to the correct fields. Notice that the Legacy\_Employee\_Num\_\_c column is not matched.

iv. Drag and drop the Hiring\_Manager\_\_r:Legacy\_Employee\_Num\_\_c to the Legacy\_Employee\_Num\_\_c column.

v. Click Save Mapping.

vi. Browse to the App Builder Lab Files directory.

vii. Type PositionMapping as the file name and click Save.

K. Click OK.

L. Click Next.

M. Select the directory where your success and error files will be saved.

i. Click Browse.

ii. Select Desktop.

iii. Click OK.

N. Click Finish. You should see the following message: "You have chosen to add new records and/or update existing records. The action you are about to take cannot be undone. Are you sure you want to proceed?"

O. Click Yes.

P. Click View Successes.

Q. Click Close.

R. In the Operation Finished dialog box of the data loader, click OK.

3. Go into the app and view some of the positions you have uploaded.

A. From the Force.com App Menu,select Recruiting.

B. Click the Positions tab.

C. From the View picklist, select All, and click Go!

D. Find some of the positions you just inserted.

4. Enable insertion of Audit Field Data.

A. Setup | Manage Users | Permission Sets | New

B. Label: Set Audit Fields, API Name (auto populates),

Description: Set Audit Fields during Data Imports

C. Click Save.

D. Click the Manage Assignments button and then click Add Assignments.

E. Check the box next to your name.

F. Click Assign and click Done.

G. Click the Back to: Permission Set link at the top.

H. Click System Permissions, then Edit.

i. Set Audit Fields upon Record Creation: Select

I. Click Save.

5. Insert the candidate data from the Candidates.csv file into Salesforce.

A. Double-click the Apex Data Loader icon on the desktop.  
Note: If you are still connected to Apex Data Loader, log out by clicking File | Logout so that the changes made in the previous step will be visible.

B. Click Insert.

C. Click Password Authentication.

D. If needed, log in by entering your Username and Password.

i. Click Log in.

ii. Click Next when you see the "Login completed successfully" message.

E. Select Candidate from the list of objects.

F. Select the Candidates.csv file.

i. Click Browse.

ii. Browse to Candidates.csv (in the App Builder Lab Files) and click Open.

iii. Click Next.

iv. A message saying “Initialization Succeeded. Your operation will contain 10 records” appears.

v. Click OK.

G. Click Choose an Existing Map.

H. Select the CandidateMapping.sdl file and click Open.

I. Click Next.

J. Select the directory where your success and error files will be saved.

i. Click Browse.

ii. Select Desktop.

iii. Click OK.

K. Click Finish. You should see the following message: "You have chosen to insert new records. Click Yes to begin. Do you want to proceed?"

L. Click Yes.

M. Click View Successes.

N. Click Close.

O. In the Operation Finished dialog box of the data loader, click OK.

6. Go into the app and view some of the candidates you have inserted.

A. From the Force.com App Menu, select Recruiting.

B. Click the Candidates tab.

C. From the View picklist, select All, and click Go!

D. Find some of the candidates you just inserted.

E. Did the Created By and Created Date fields get set from the CSV file? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2-8: Upsert the Remaining Object Data

Execute an upsert for the remaining objects in the recruiting app (Job Applications, Interviewers, and Reviews) using the mapping files in the Mapping Files folder in the App Builder Lab Files file folder. Follow the same pattern that you used to upload the candidates.

3-1: Create Tab for New Object

1. Create a review tab.

A. Click Setup | Create | Tabs.

B. In the Custom Object Tabs section, click New.

i. Object: Review

ii. Tab Style: Click the magnifying glass and select Thermometer.

C. Click Next.

D. Leave the profiles as is and click Next.

E. In the Add to Custom Apps section:

i. Deselect Include Tab and select Recruiting

ii. Append tab to users’ existing personal customizations: Select

iii. Click Save.

2. Add and reorder tabs to the recruiting app.

A. Click Setup | Create | Apps | Recruiting.

B. Click Edit.

C. In the Choose the Tabs section, click on each Selected Tab and use the Up and Down arrows to rearrange the tabs in this order:

i.Home

ii. Chatter

iii.Positions

iv.Candidates

v.Job Applications

vi.Interviewers

vii.Reviews

viii.Job Posting Sites

D. Overwrite Users’ Personal Custom App Customization: Select

E. Default Landing Tab: Positions

F. Click Save.

3-2: Create an Object-Specific Quick Action

1. Create an object-specific quick action to create a job application from a candidate record.

A. Select Setup | Create | Objects | Candidate.

B. Click New Action from the Buttons, Links, and Actions list.

C. Action Type: Create a Record

D. Target Object: Job Application

E. Label: New Job App. This is the name users see for the action in the publisher menu. The Name field auto-populates.

F. Description: Action to create a Job Application from a Candidate record. This description is not visible to users.

G. Click Save.

2. Customize the action's page layout.

A. The required fields have already been added to the layout. Drag and drop the **Currency** field to add it to the layout, placing it to the right of the Candidate field.

B. Click Save.

3. Set the predefined field value.

A. Click New in the Predefined Field Values list on the action detail page.

B. Select the Stage field from the Field Name picklist.

C. Select New from the A specific value picklist.

D. Click Save.

4. Add the action to the Candidate page layout.

A. Select Setup | Create | Objects | Candidate.

B. Click Edit on the Candidate Layout, under Page Layouts.

C. Under Quick Actions in the Salesforce Classic Publisher, click the override the global publisher layout link.

D. Select Quick Actions from the Page Layout editor.

E. Drag the New Job App action to the Quick Actions in the Publisher section of the page layout. Place it after Post and File.

F. Click Save.

5. Test the new action.

A. Navigate to the Candidates tab and create a new candidate record.

B. Is the New Job App action listed on the newly created candidate record?  
\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

C. Click the New Job App action.

D. Select an available position and click Create.

E. Navigate to the Job Applications tab and click GO!

F. Is the job application you created listed?  
\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3-3: Customize Review Page Layouts

1. Customize a review page layout.

A. Click Setup | Create | Objects | Review.

B. In the Page Layouts section, click Edit next to Review Layout.

2. Create a new section for Cultural Fit.

A. Drag Section from the palette to below the Information section.

i. Section Name: Cultural Fit

ii. Layout: 1-Column

iii. Click OK.

B. Drag the Cultural Fit and Cultural Comments fields from the Information section into the Cultural Fit section.

3. Create a new section for Leadership Skills.

A. Drag Section from the palette to below the Cultural Fit section.

i. Section Name: Leadership Skills

ii. Layout: 1-Column

iii. Click OK.

B. Drag the Leadership Skills and Leadership Comments fields from the Information section into the Leadership Skills section.

4. Create a new section for Experience.

A. Drag Section from the palette to below the Leadership Skills section.

i. Section Name: Experience

ii. Layout: 1-Column

iii. Click OK.

B. Drag the Experience and Experience Comments fields from the Information section into the Experience section.

5. Create a new section for Recommendation.

A. Drag Section from the palette to below the Experience section.

i. Section Name: Recommendation

ii. Layout: 1-Column

iii. Click OK.

B. Drag the Recommend for Hire and Reason Recommended fields from the Information section into the Recommendation section.

6. Drag the **Currency** field from the Information Section back into the palette to remove it.

1. In the Review Detail section, set fields (not comments) to Required.

A. Select Cultural Fit, hold down CTRL and select Leadership Skills and Experience.

B. Hover one of the highlighted fields and click the wrench icon.

C. Field Properties: Select Required for each field.

D. Click OK.

E. Click Save.

3-4: Enable Chatter on the Review Object

1. Enable Chatter feed tracking on the Review object.

A. Click Setup | Customize | Chatter | Feed Tracking.

B. Select the Review object.

C. Click Enable Feed Tracking.

D. Job Application, Leadership Skills, Reason Recommended, Cultural Fit, Experience, Interviewer, Recommend for Hire: Select

E. Click Save.

1. Test the chatter feed.

A. Create a new Review record using your own data.

B. Change the Cultural Fit, Leadership Skills, and Experience values.

C. Observe the changes to the Chatter feed on the record. You may need to expand the feed.

4-1: Create Cross-Object Formulas

1. Create a cross-object formula field to display the Candidate full name on the Review.

A. Click Setup | Create | Objects.

B. Click Review in the Custom Objects list.

C. In the Custom Fields & Relationships section, click New.

i. In the Data Typefield, select Formula.

ii. Click Next.

D. Enter the following field details:

i. Field Label: Candidate Name

ii. Field Name: Candidate\_Name (This field auto-populates.)

iii. Formula Return Type: Text

E. Click Next.

F. Select the **Advanced Formula** tab. Add the formula.

i. Candidate Name (Text) =: Job\_Application\_\_r.Candidate\_\_r.First\_Name\_\_c &" "& Job\_Application\_\_r.Candidate\_\_r.Last\_Name\_\_c

ii. Click Check Syntax to verify the syntax.

iii. After verifying that there are no errors, click Next.

G. Set the field visible for all profiles and click **Next**.

H. Click Save & New to accept the defaults on the Add to Layout page.

2. Create a cross-object formula field to display Position Title on the Review.

A. In the Data Type field, select Formula.

B. Click Next.

C. Enter the following field details:

i. Field Label: Position Title

ii. Field Name:Position\_Title (This field auto-populates.)

iii. Formula Return Type: Text

D. Click Next.

E. Add the formula.

i. Position Title (Text) =:Job\_Application\_\_r.Position\_\_r.Name

Note: The label of the Name field is Title.

ii. Click Check Syntax to verify the syntax.

iii. After verifying that there are no errors, click Next.

F. To accept the defaults for field-level security, click Next.

G. Click Save to accept the defaults on the Add to Layout page.

3. Modify the Review page layout with a new section called Position & Candidate.

A. Click **Review** in the Custom Objects list.

B. In the Page Layouts related list, click the Edit link next to the Review Layout.

C. Drag Section from the palette to below the Information section.

i. Section Name: Position & Candidate

ii. Layout: 2-Column

iii. Click OK.

iv. Click and drag Position Title and Candidate Name to the new section.

D. Click Save.

4. Create a new review record to view the new fields.

4-2: Create Formula and Roll-Up Summary Fields

1. Create a custom formula field that calculates the overall score from the Review object.

## Click Setup | Create | Objects | Review.

## In the Custom Fields & Relationships related list, click New.

## In the Data Type field, click Formula.

## Click Next.

## Enter the following field details:

### Field Label: Overall Review Score

### Field Name:Overall\_Review\_Score (This field auto-populates.)

### Formula Return Type: Number

## Click Next.

## Add the formula.

### Overall Score (Number) =

### ( Cultural\_Fit\_\_c + Experience\_\_c + Leadership\_Skills\_\_c + IF( Recommend\_for\_Hire\_\_c , 5, 0) ) / 4

### Click Check Syntax to verify the syntax.

### Click Next.

### To accept the defaults for field-level security, click Next.

## Click Save to accept the defaults and add the field to the Page Layout.

2. Create a roll-up summary field for Number of Reviews on the Job Application object.

A. Click Setup | Create | Objects | Job Application.

B. In the Custom Fields & Relationships section, click New.

i. Data Type: Roll-Up Summary

ii. Click Next.

iii. Field Label: Number of Reviews

iv. Field Name: Number\_of\_Reviews (This field auto-populates.)

v. Click Next.

vi. Summarized Object: Reviews

vii. Select Roll-Up Type: Count

viii. Filter Criteria: All records should be included in the calculation: Select

C. Click Next.

D. Click Next.

E. Click Save & New.

3. Create a roll-up summary field for Review Scores on the Job Application object.

A. Continue from previous task.

i. Data Type: Roll-Up Summary

ii. Click Next.

iii. Field Label: Total Review Score

iv. Field Name: Total\_Review\_Score (This field auto-populates.)

v. Click Next.

vi. Summarized Object: Reviews

vii. Roll-Up Type: Sum

viii. Field to Aggregate: Overall Review Score

ix. Filter Criteria: All records should be included in the calculation: Select

B. Click Next.

C. Click Next.

D. Click Save & New.

4. Create a formula field that calculates the Average Review Score for a job application.

A. Enter the following details of the new formula field:

### Data Type: Formula

### Click Next.

### Field Label: Average Review Score

### Field Name: Average\_Review\_Score (This field auto-populates.)

### Formula Return Type: Number

B. Click Next.

C. Add the formula:

i. Average Review Score (Number) =: IF(Number\_of\_Reviews\_\_c <> 0, Total\_Review\_Score\_\_c / Number\_of\_Reviews\_\_c, null)

ii. Click Check Syntax to verify the syntax.

iii. After verifying that there are no errors, click Next.

D. Click Next.

E. Click Save.

5. Create a new formula field to show a green, yellow, or red light on a job application record, depending on the Average Review Score.

A. Scroll down to the Custom Fields & Relationships related list and click New.

B. Data Type: Formula

C. Click Next.

i. Field Label: Review Indicator

ii. Field Name: Review\_Indicator (This field auto-populates.)

iii. Formula Return Type: Text

D. Click Next.

i. Enter the following formula in the Rating (Text) = textbox:

### IF(Average\_Review\_Score\_\_c >= 3.5,

### IMAGE("/img/samples/light\_green.gif", "Green"),

### IF(Average\_Review\_Score\_\_c >= 2.5,

### IMAGE("/img/samples//light\_yellow.gif", "Yellow"),

### IF(Average\_Review\_Score\_\_c > 0,

### IMAGE("/img/samples/light\_red.gif", "Red"),

### "No Reviews")))

ii. Click Check Syntax.

E. Click Next.

F. Click Next.

G. Click Save.

6. Add the new fields to a Candidate Rating Section on the Job Application page layout.

A. From the Job Application Custom Object properties page, scroll down to the Page Layouts related list, then click Edit next to Job Application Layout.

B. Create a new section for Candidate Rating fields.

i. Drag a Section from the palette to below the Information section.

ii. Section Name: Candidate Rating

iii. Layout: 1-Column

iv. Click OK.

C. Drag the Number of Reviews, Total Review Score, Average Review Score, Review Indicator fields from the Information section into the Rating section.

D. Drag Status and Stage to the right within the Information section.

E. Drag the **Currency** field from the Information Section back into the palette to remove it.

F. Click Save.

7. Create a Job Application record and add Reviews to test the newly create fields.

A. Click the Job Applications tab.

B. Create a new Job Application record.

C. Create 3 Review records related to the newly created Job Application. Ensure the Cultural Fit, Leadership Skills and Experience fields have a number between 1 and 5 in them.

D. Check to ensure all the fields in the Review Information section are displaying data.

4-3: Create Validation Rules

1. Create a new validation rule that requires that all positions must have a Hiring Manager listed.

A. Click Setup | Create | Objects | Position.

B. In the Validation Rules related list, click New.

i. Rule Name: Every Position Must Have a Hiring Mgr

ii. Active: Select

iii. Description: Every position record must have a hiring manager.

iv. Error Condition Formula:

ISBLANK(Hiring\_Manager\_\_c )

&& $Profile.Name <> “System Administrator”

v. Click Check Syntax to verify your formula.

vi. Error Message: Every Position must have a Hiring Manager.

vii. Error Location: Field: Hiring Manager

C. Click Save.

D. Sign in as Daniel Garcia and create a new Position record to test these validation rules.

5-1: Modify Existing Custom Profiles

1. Customize how to view profiles.

A. Click Setup | Customize | User Interface.

B. Setup: Enable Enhanced Profile User Interface: Deselect

C. Click Save.

2. Modify an existing custom recruiter profile.

A. Click Setup | Manage Users | Profiles.

B. Click the HR User profile name.

C. Click Edit.

D. Scroll down to Custom Object Permissions.

E. Ensure the Basic Access for each object reflects this table:

| **Object** | **Read** | **Create** | **Edit** | **Delete** |
| --- | --- | --- | --- | --- |
| Candidates |  |  |  |  |
| Interviewers |  |  |  |  |
| Job Applications |  |  |  |  |
| Job Postings |  |  |  |  |
| Job Posting Sites |  |  |  |  |
| Positions |  |  |  |  |
| Reviews |  |  |  |  |
|  |  |  |  |  |

F. Click Save.

5-2: Create Permission Sets

1. Create a new permission set for hiring managers.

A. Click Setup | Manage Users | Permission Sets.

B. Click New.

C. Label: Hiring Manager

D. Description: Temporary permission set for those Hiring Managers that need to interview candidates for positions in their department.

E. User License: Salesforce

F. Click Save.

G. Click Assigned Apps in the Apps section.

H. Click Edit.

I. Select Recruiting from the Available Apps list and click Add.

J. Click Save.

K. Click the down arrow in the Assigned Apps list and select Object Settings.

L. Select Interviewers from the Object Settings list.

M. Click Edit.

N. Tab Settings: Visible: Select

O. Select Read, Create, and Edit from the Object Permissions list.

P. Click Save.

Q. Repeat steps K-P for the Job Applications, Job Postings, Job Posting Sites, Positions, and Reviews objects. Set the permissions to reflect the settings shown below:

| **Object** | **Tab Settings** | **Read** | **Create** | **Edit** | **Delete** |
| --- | --- | --- | --- | --- | --- |
| Interviewers | Visible |  |  |  |  |
| Job Applications | Visible |  |  |  |  |
| Job Postings | --------- |  |  |  |  |
| Job Posting Sites | Visible |  |  |  |  |
| Positions | Visible |  |  |  |  |
| Reviews | Visible |  |  |  |  |

2. Assign user to the new permission sets.

A. Click Setup | Manage Users | Users.

B. Click Cooper, Kathy.

C. Scroll down to Permission Sets Assignments.

D. Click Edit Assignments.

E. Select the Hiring Managers permission set.

F. Click Save.

5-3: Modify Field-Level Security

1. Set field-level security.

A. Click Setup | Create | Objects | Position.

B. In the Custom Fields & Relationships related list, click **Salary Range**.

C. Click Set Field-Level Security.

D. Check Visible for Executive User, HR User, and System Administrator. Deselect Visible for all other profiles.

E. Click Save.

2. Set permissions.

A. Click Setup | Manage Users | Permission Sets | Hiring Manager.

B. Apps: Object Settings

C. Click Positions from the list of object names.

D. Click Edit.

E. Field Permissions: Salary Range: Read Access and Edit Access: Select

F. Click Save.

**5-4: Restrict Data Access**

1. Set the organization-wide defaults for Recruiting app objects.

A. Click Setup | Security Controls | Sharing Settings.

B. Click Edit in the Organization-wide Defaults.

C. Select Private for the Candidate object.

D. Select Private for the Interviewer object.

E. Select Private for the Job Application object.

F. Select Public Read Only for the Job Posting Site object.

G. Select Private for the Position object.

H. Click Save.

6-1: Create a Process

1. Log into the Sandbox.

A. Click Setup | Deploy | Sandboxes.

B. Click **Log In** next to TestOrg.

C. Enter the same password that you have been using for production.

D. Notice that it now says "Sandbox:TestOrg" in the upper right corner of the browser window.

2. (Sandbox) Create a process with an immediate action.

A. Click Setup | Create | Workflow & Approvals | Process Builder.

B. Click New.

C. Define the process properties.

i. Name: Create Interviewer Record

ii. Description: Create an interviewer record for a new position.

iii. The process starts when\*: A record changes

iv. Click Save.

D. Click + Add Object.

i. Object: Position

ii. Start the process: Only when a record is created: Select

E. Click Save.

F. Click + Add Criteria.

i. Criteria Name: Hiring Manager Not Blank

ii. Criteria for Executing Actions: Conditions Are Met: Select

iii. Field: Position: Hiring\_Manager\_c

iv. Operator: Does Not Equal

v. Type: **Global** Constant

vi. Click the Value field and select $GlobalConstant.Null.

G. Click Save.

H. Under IMMEDIATE ACTIONS, click + Add Action.

i. Action Type: Create a Record

ii. Action Name: Create Interviewer Record

iii. Record Type: Interviewer

I. Relate the interviewer record to the position record.

i. Field: Position

ii. Type: **Field** Reference

iii. Click the Value field, select Record ID, and click Choose.

J. Set the Employee field to the Hiring Manager.

i. Click + Add Row.

ii. Field: Employee

iii. Type: **Field** Reference

iv. Click the Value field, select Hiring\_Manager\_\_c, and click Choose.

K. Click Save.

L. Click Activate.

M. Click Confirm.

3. (Sandbox) Test the process.

A. Click Back To Setup (located in the top right of the screen).

B. Click the Positions tab and then click New.

i. Title: Full-Stack Web Developer

ii. Job Description:Work with a team to design, code, implement and maintain a fully functional, modern interactive website.

iii. Location: US

iv. Pay Grade: ENG-200

v. Status: New

vi. Hiring Manager: Kathy Cooper

vii. Department: Engineering

C. Click Save.

D. From the Interviewers related list, click the Interviewer No.

E. Verify that the Employee and Position fields have the correct values.

6-2: Create a Multi-Step Approval Processes

1. (Sandbox) Build three new fields on the position object.

A. Click Setup | Create | Objects | Position.

B. Build the first field on the position object.

i. Custom Fields & Relationships: New

ii. Data Type: Lookup Relationship

iii. Related To: User

iv. Click Next.

v. Field Label: Approver #1

vi. Field Name: Approver\_1 (This field auto-populates.)

vii. Click Next.

viii. Click Next.

ix. Click Save & New.

C. Build the second field on the position object.

i. Data Type: Lookup Relationship

ii. Related To: User

iii. Click Next.

iv. Field Label: Approver #2

v. Field Name: Approver\_2 (This field auto-populates.)

vi. Click Next.

vii. Click Next.

viii. Click Save & New.

D. Build the third field on the position object.

i. Data Type: Lookup Relationship

ii. Related To: User

iii. Click Next.

iv. Field Label: Approver #3

v. Field Name: Approver\_3 (This field auto-populates.)

vi. Click Next.

vii. Click Next.

viii. Click Save.

2. (Sandbox) Edit the Position Layout.

A. Hover over Page Layouts.

B. Click Edit.

C. Create a new section by dragging Section from the palette to under the Experience & Education section.

D. Section Name: Approvers

E. Layout: 1-Column

F. Select OK.

G. Drag Approver #1, Approver #2, and Approver 3 fields (from the information section) in to the Approvers section.

H. Click Save.



3. (Sandbox) Create a multi-step approval process.

A. Click Setup | Create | Workflow & Approvals | Approval Processes.

B. Select Position from the Manage Approval Processes for picklist.

C. Click Create New Approval Process | Use Standard Setup Wizard.

i. Process Name: New Position Approval

ii. Unique Name: New\_Position\_Approval (This field auto-populates.)

iii. Description: All positions must be approved by the recruiter’s manager and three other approvers. These approvers are tracked in approver fields on the position object.

iv. Click Next.

D. Specify the entry criteria as:

i. Use this approval process if the following: criteria are met

ii. Leave Field, Operator, and Value blank.

iii. Click Next.

E. Specify Approver Field and Record Editability Properties.

i. Next Automated Approver Determined By: Manager

ii. Use Approver Field of Position Owner: Select

iii. Administrators OR the currently assigned approver can edit records during the approval process: Select

iv. Click Next.

F. Select Notification Templates.

i. Approval Assignment Email Template: Position Approval Needed

ii. Leave the Approval Post Template field blank.

iii. Click Next.

G. Select Fields to Display on the Approval Page Layout.

i. Select Fields: Department, Education, Job Description, Location, Pay Grade, Salary Range, and Skills Required (hold CTRL to select multiple fields).

ii. Display approval history information in addition to the fields selected above: Select

iii. Allow approvers to access the approval page only from within the salesforce.com application (Recommended): Select

iv. Click Next.

H. Specify Initial Submitters.

i. Submitter Type: Owner

ii. Allowed Submitters: Position Owner

iii. Allow submitters to recall approval requests: Select

iv. Click Save.

I. Select I'll do this later. Take me to the approval detail page to review what I've

just created.

i. Click Go!

4. (Sandbox) Create initial submission actions.

A. Under the Initial Submission Actions related list, click Add New | Field Update.

B. Enter the field update details.

i. Name: Approval Status to Pending

ii. Unique Name: Approval\_Status\_to\_Pending (This field auto-populates.)

iii. Field to Update: Approval Status

iv. Picklist Options: A specific value: Pending

C. Click Save.

5. (Sandbox) Create approval steps.

A. Under the Approval Steps related list, click New Approval Step.

i. Name: Manager of Position Owner

ii. Unique Name: Manager\_of\_Position\_Owner (This field auto-populates.)

iii. Step Number: 1

iv. Click Next.

B. All records should enter this step: Select

C. Click Next.

i. Automatically assign using the user field selected earlier (Manager): Select

ii. Click Save.

D. Select No, I'll do this later. Take me to the approval process detail page to review what I've just created.

i. Click Go!

E. Under the Approval Steps related list, click New Approval Step.

i. Name: Position Approver #1

ii. Unique Name: Position\_Approver\_1 (This field auto-populates.)

iii. Step Number: 2

iv. Click Next.

F. All records should enter this step: Select and click Next.

G. Automatically assign to approver(s): Select and then select Related User from the picklist that appears, and select Approver #1 from the secondary picklist.

i. When multiple approvers are selected: Approve or reject based on the FIRST response: Select

ii. What should happen if the approver rejects this request? Perform all rejection actions for this step AND all final rejection actions (Final Rejection): Select

iii. Click Save.

H. Select No, I'll do this later. Take me to the approval process detail page to review what I've just created.

i. Click Go!

I. Under the Approval Steps related list, click New Approval Step.

i. Name: Position Approver #2

ii. Unique Name: Position\_Approver\_2 (This field auto-populates.)

iii. Step Number: 3

iv. Click Next.

J. All records should enter this step: Select and click Next.

K. Automatically assign to approver(s): Select and then select Related User from the picklist that appears, and select Approver #2 from the secondary picklist.

L. Click Save.

M. Select No, I'll do this later. Take me to the approval process detail page to review what I've just created.

i. Click Go!

N. Under the Approval Steps related list, click New Approval Step.

i. Name: Position Approver #3

ii. Unique Name: Position\_Approver\_3 (This field auto-populates.)

iii. Description: Only for positions with a senior level pay grade.

iv. Step Number: 4

v. Click Next.

O. Enter this step if the following criteria are met: Select

i. Field: Position: Salary Range

ii. Operator: equals

iii. Value: Click the lookup button, then select and insert 90K-120K and 120K+.

iv. Click Next.

P. Automatically assign to approver(s): Select and then select Related User from the picklist that appears, and select Approver #3 from the secondary picklist.

Q. Click Save.

R. Select No, I'll do this later. Take me to the approval process detail page to review what I've just created.

i. Click Go!

6. (Sandbox) Create final approval actions.

A. Under the Final Approval Actions related list, click Add New | Field Update.

i. Name: Approval Status to Approved

ii. Unique Name: Approval\_Status\_to\_Approve (This field auto-populates.)

iii. Field to Update: Approval Status

iv. Picklist Options: A specific value: Approved

B. Click Save & New.

i. Name: Status to Open

ii. Unique Name: Status\_to\_Open

iii. Field to Update: Status

iv. Picklist Options: A specific value: Open

v. Click Save.

C. Under the Final Approval Actions related list, click Add New | Email Alert.

i. Description: Email Position Owner about Approval

ii. Unique Name: Email\_Position\_Owner\_about\_Approval (This field auto-populates.)

iii. Email Template: Click the lookup button and select Position Approved.

iv. Recipient Type: Select Owner.

v. Select and add recipient: Position Owner

vi. Click Save.

7. (Sandbox) Create final rejection actions.

A. Under the Final Rejection Actions related list, click Add New | Field Update.

i. Name: Approval Status to Rejected

ii. Unique Name: Approval\_Status\_to\_Rejected

iii. Field to Update: Approval Status

iv. Picklist Options: A specific value: Not Approved

B. Click Save & New.

i. Name: Status to Closed

ii. Unique Name: Status\_to\_Closed

iii. Field to Update: Status

iv. Click Next.

v. Picklist Options: A specific value: Closed

C. Click Save.

D. Under the Final Rejection Actions related list, click Add New | Email Alert.

i. Description: Email Position Owner about Rejection.

ii. Unique Name: Email\_Position\_Owner\_about\_Rejection (This field auto-populates.)

iii. Email Template: Click the lookup button and select Position Rejected.

iv. Recipient Type: Select Owner.

v. Select and add recipient: Position Owner.

vi. Click Save.

E. Under the Recall Actions related list, click Add New | Field Update.

i. Name: Approval Status to Recalled

ii. Unique Name: Approval\_Status\_to\_Recalled

iii. Field to Update: Approval Status

iv. Picklist Options: A specific value: Recalled

v. Click Save.

8. Click the **View Diagram** button to see the Approval Process Visualizer. Notice the criteria nodes and steps.

9. (Sandbox) Activate the process.

A. Click Activate.

B. When you receive the popup that says, “After activating this approval process, you cannot add or remove approval steps. Also, some approval step attributes may not be editable. Continue?” click OK.

10. (Sandbox) Use Process Builder to automatically submit new positions for approval.

A. Click Setup | Create | Workflow & Approvals | Process Builder.

B. Click New.

C. Define the process properties.

i. Process Name: Submit New Positions for Approval

ii. API Name: Submit\_New\_Positions\_for\_Approval (This field auto-populates.)

iii. The process starts when\*: A record changes

iv. Click Save.

D. Click + Add Object.

i. Object: Position

ii. Start the process: when a record is created or edited: Select

E. Click Save.

F. Click + Add Criteria.

i. Criteria Name: Position Ready for Approval

ii. Criteria for Executing Actions: Conditions are met: Select

G. Set Conditions.

i. Field: Click the lookup button, select Status, and then click Choose.

ii. Operator: Equals

iii. Type: Picklist

iv. Value: New

H. Click + Add Row.

i. Field: Click the lookup button, select Job Description, and then click Choose.

ii. Operator: Does not equal

iii. Type: Global Constant

iv. Value: $GlobalConstant.Null

I. Click + Add Row.

i. Field: Click the lookup button, select Department, and then click Choose.

ii. Operator: Does not equal

iii. Type: Global Constant

iv. Value: $GlobalConstant.Null

J. Click + Add Row.

i. Field: Click the lookup button, select Education, and then click Choose.

ii. Operator: Does not equal

iii. Type: Global Constant

iv. Value: $GlobalConstant.Null

K. Click + Add Row.

i. Field: Click the lookup button, select Hiring\_Manager\_c, and then click Choose.

ii. Operator: Does not equal

iii. Type: Global Constant

iv. Value: $GlobalConstant.Null

L. Click Save.

M. Under IMMEDIATE ACTIONS (adjacent to Position Ready for Approval), click Add Action.

i. Action Type: Submit for Approval

ii. Action Name: Submit Position for Approval

iii. Object: Position\_c

iv. Approval Process: Specific approval process: New Position Approval – New\_Position\_Approval

v. Click Save.

vi. Click Activate.

vii. Click Confirm.

11. (Sandbox) Test the process. Log in as Noah Larkin. Create a position with approvers and a Hiring Manager. Ensure the record was automatically submitted for approval.

6-3: Create a Flow with Radio Buttons

1. (Production) Create a flow.

A. Click Setup | Create | Workflow & Approvals | Flows.

B. Click New Flow. The Welcome to Cloud Flow Designer screen opens displaying an overview video. Click Close to close the screen.

2. (Production) Add a screen element to prompt for the Review information.

A. Drag and drop Screen from the palette onto the flow window.

B. In the Name field, enter New Review. (The Unique Name field auto-populates.)

C. Click the Add a Field tab.

D. Double-click Radio Buttons to add that field type.

E. Click the newly added [Radio Buttons] field in the window on the right and enter Experience as the label. (The Unique Name field auto-populates.)

F. Set the Values Data Type to Number.

G. Set the Scale to 0.

H. Under Choice Settings, click the down-arrow next to ‘Select resource’ then click **CREATE NEW** and select **Choice**.

i. Label: Excellent

ii. Unique Name: Excellent

iii. Value Data Type: Number

iv. Stored Value: 5

v. Click OK.

I. Click the **Add Choice** link four times.

J. Click CREATE NEW and select Choice.

i. Label: Very Good

ii. Unique Name: Very Good

iii. Value Data Type: Number

iv. Stored Value: 4

v. Click OK.

K. Click CREATE NEW and select Choice.

i. Label: Average

ii. Unique Name: Average

iii. Value Data Type: Number

iv. Stored Value: 3

v. Click OK.

L. Click CREATE NEW and select Choice.

i. Label: Below Average

ii. Unique Name: Below Average

iii. Value Data Type: Number

iv. Stored Value: 2

v. Click OK.

M. Click CREATE NEW and select Choice.

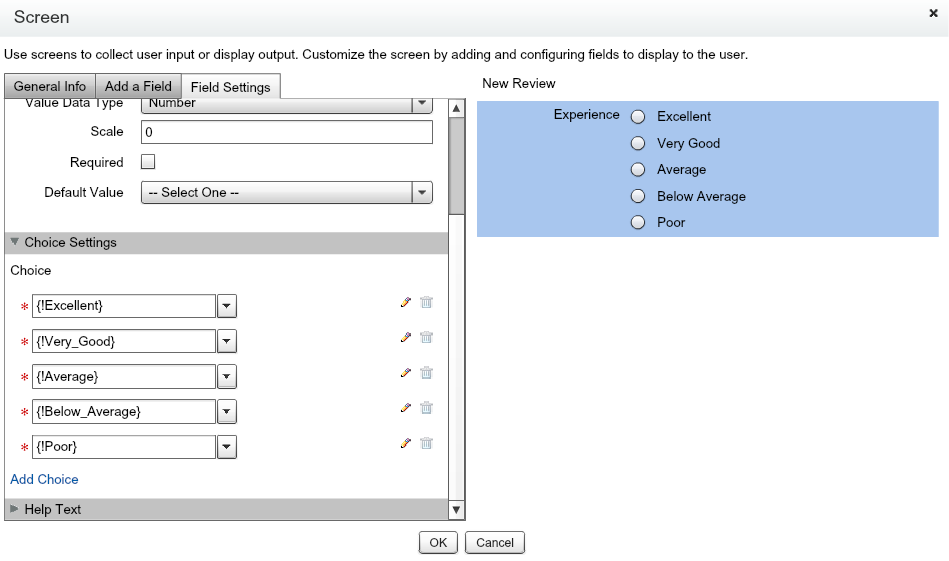
i. Label: Poor

ii. Unique Name: Poor

iii. Value Data Type: Number

iv. Stored Value: 1

v. Click OK.



### N. Click the Add a Field tab and double-click the Textbox field.

### O. Click the [Textbox] field in the window on the right.

### P. Input Label: Experience Comments

### Q. Click the Add a Field tab and double-click the Radio Buttons field.

### R. Click the [Radio Buttons] field in the window on the right.

### S. Input Label: Leadership Skills

T. Set the Values Data Type to Number, and set the Scale to 0.

U. Under Choice Settings, click the down-arrow next to ‘Select resource’ then click CHOICES and select # Excellent.

V. Click the **Add Choice** link four times.

W. Repeat Step U to add **Very Good**, **Average**, **Below Average**, and **Poor**.

### X. Click the Add a Field tab and double-click the Textbox field.

### Y. Click the [Textbox] field in the window on the right.

### Z. Input Label: Leadership Comments

### AA. Click the Add a Field tab and double-click the Radio Buttons field.

### BB. Click the [Radio Buttons] field in the window on the right.

### CC. Input Label: Cultural Fit

DD. Set the Values Data Type to Number, and set the Scale to 0.

EE. Under Choice Settings, click the down-arrow next to ‘Select resource’ then click CHOICES and select # Excellent.

FF. Click the **Add Choice** link four times.

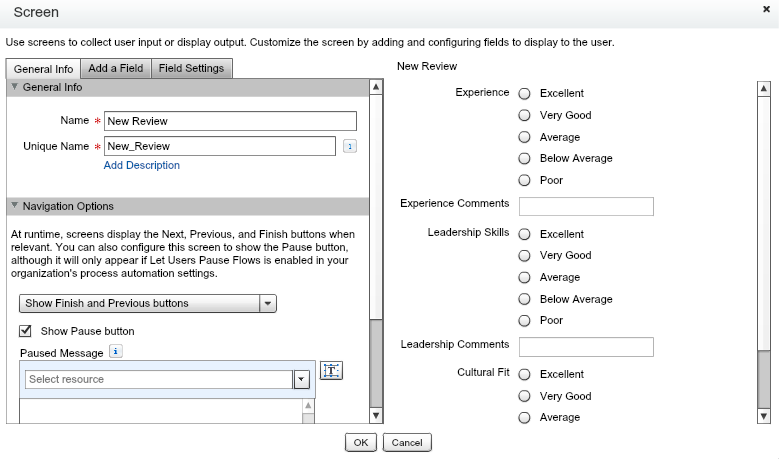
GG. Repeat Step EE to add **Very Good**, **Average**, **Below Average**, and **Poor**.

### HH. Click the Add a Field tab and double-click the Textbox field.

### II. Click the [Textbox] field in the window on the right.

### JJ. Input Label: Cultural Comments

### KK. Verify that screen looks like this so far:



### LL. Click the Add a Field tab and double-click the Checkbox field.

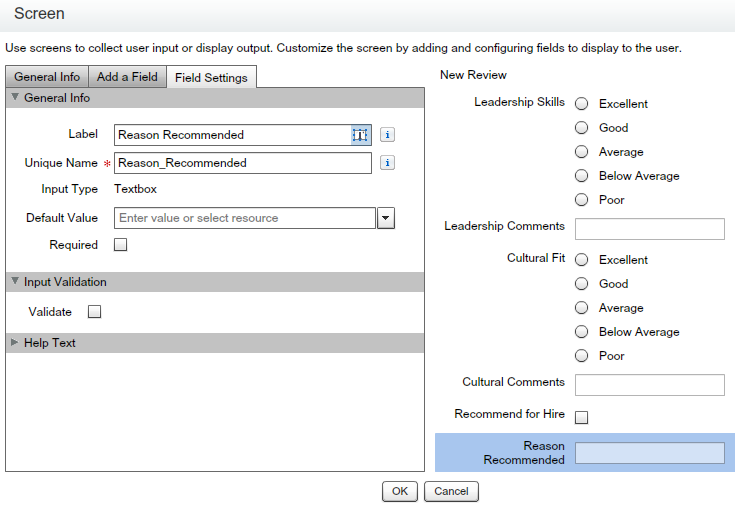
### MM. Click the [Checkbox] field in the window on the right.

NN. Label: Recommend for Hire

### OO. Click the Add a Field tab and double-click the Textbox field.

### PP. Click the [Textbox] field in the window on the right.

### QQ. Input Label: Reason Recommended



### RR. Click **OK** to close the screen.

3. (Production) Set the start element for the flow.

A. Hover over the New Review element.

B. Click the Set as Start Element icon, which is the green circle in the upper right-hand corner of the element.

C. Click Save and save the flow with the name New Review. Click OK on the General Warning screen.

4. (Production) Add a Record Create element to the Flow.

A. Drag and drop the Record Create element from the palette on to the designer.

B. Name the element: createReview

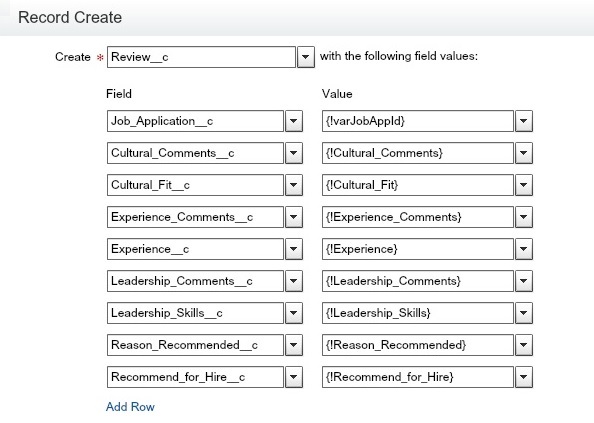
C. Create: Review\_\_c

D. Populate the Field and Value table as follows:

i. Field: Job\_Application\_\_c

ii. Value: Create New | Variable | varJobAppId | Data Type: Text | Input/Output Type: Input and Output | OK

iii. Map the rest of the values according to the screen below. (HINT: Type the first few letters of the Field or Value name, then click on it when you see it.)



E. Click OK.

F. Connect the New Review screen element to the Create Review element.

5. (Production) Add a screen element to display a success message.

A. Drag and drop **Screen** from the palette onto the flow window.

B. Name the element: Record Created

### C. Click the Add a Field tab and double-click the Display Text field (NOTE: This is a different field type than **Textbox**).

### D. Click the [Display Text] field in the window on the right.

### E. Unique Name: RecordCreated

### F. Enter the following text: Your review record has been created successfully.

### G. Click OK.

### H. Connect the **createReview** element to the Record Created element.

### I. Click Save.

6. (Production) Add a screen element to display faults for data elements.

A. Drag and drop **Screen** from the palette onto the flow window.

B. Name the element: Display Faults

C. Click the Add a Field tab and double-click the Display Text field.

D. Click the [Display Text] field in the window on the right.

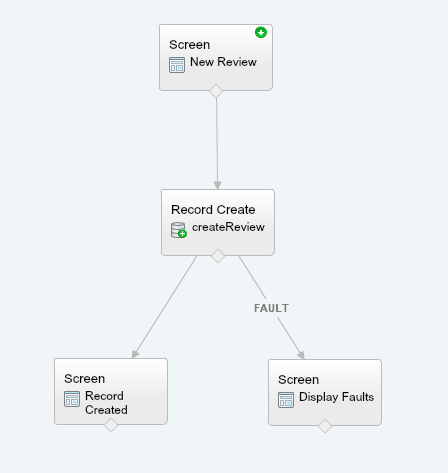
E. Unique Name: Display\_Fault\_Message

F. From the Select Resource picklist, scroll to the bottom of the list and select SYSTEM AND GLOBAL VARIABLES | $Flow | FaultMessage.

G. Click OK.

H. Connect the **createReview** element to the Display Faults element.

I. Verify that your Flow looks like this:



J. Click Save.

K. Click Close.

L. Click the Activate link next to your Flow Version.

6-4: Deploy a Flow

1. (Production) Create the custom button to launch the New Review Flow

A. Setup | Create | Objects | Job Application | Buttons, Links and Actions |New Button or Link.

B. Create the button with the following inputs:

i. Label: New Review

ii. Name: New\_Review

iii. Display Type: Detail Page Button

iv. Behavior: Display in existing window without sidebar or header

v. Link URL: /flow/New\_Review?varJobAppId={!Job\_Application\_\_c.Id}&retURL=/{!Job\_Application\_\_c.Id}

C. Click **Save**.

D. Click « Back to Custom Object: Job Application.

2. (Production) Add the New Review button to the page layout.

A. Navigate to the page layout editor link at the top of the object settings page.

B. Click Edit next to the Job Application Layout.

C. Click Buttons in the top left window of the page layout editor.

D. Click, hold and drag the New Review button and drop it on Custom Buttons next to the Job Application Detail.

E. Click **Save.**

3. (Production) Run the flow.

A. Click the Job Applications tab.

B. Click Go next to View in the tab.

C. Click on a Job Application record.

D. Click the **New Review** button.

E. Fill in all the fields with data and click **Next.**

F. From the recent items in the sidebar, click the Job Application record at the top of the list.

G. Reference the created Review record in the related list by clicking the Review  
record.

6-5: Build a Dynamic Approval Process Using Flow

1. (Sandbox) Create an approval matrix custom object.

A. From Setup, enter Objects in the Quick Find box, then select Objects under Create.

B. Click New Custom Object.

i. Label: Position Approval Matrix

ii. Plural Label: Position Approval Matrices

iii. Object Name: Position\_Approval\_Matrix (This field auto-populates.)

iv. Record Name: Routing ID

v. Data Type: Auto Number

vi. Display Format: RoutingID-{0000}

vii. Starting Number: 1

viii. Allow Reports: Select

ix. Allow Activities: Select

x. Track Field History: Select

xi. Deployed: Select

xii. Allow Search: Select

xiii. Add Notes and Attachments related list to default page layout: Deselect

xiv. Launch New Custom Tab Wizard after saving this custom object: Select

C. Click Save.

D. Use the lookup icon to select any tab style.

E. Click Next.

F. Click Next.

G. Add the tab only to the Recruiting app.

H. Click Save.

2. Add fields to the Position Approval Matrix object.

A. Under the Custom Fields & Relationships related list, click New.

B. Select the Lookup Relationship radio button under Data Type, and click Next.

C. Select User from the Related To picklist, and click Next.

i. Field Label: Approver #1

ii. Field Name:Approver\_1

D. Click Next.

E. Click Next.

F. Click Save & New to add the field to the page layout.

G. Select the Lookup Relationship radio button under Data Type, and click Next.

H. Select User from the Related To picklist, and click Next.

i. Field Label: Approver #2

ii. Field Name: Approver\_2

I. Click Next.

J. Click Next.

K. Click Save & New to add the field to the page layout.

L. Select the Lookup Relationship radio button under Data Type, and click Next.

M. Select User from the Related To picklist, and click Next.

i. Field Label: Approver #3

ii. Field Name: Approver\_3

N. Click Next.

O. Click Next.

P. Click Save & New to add the field to the page layout.

Q. Select the Picklist radio button under Data Type, and click Next.

i. Field Label: Department

ii. Values: Choose the radio button that says Use Global Picklist Value Set, then select Department.

iii. Field Name: Department (This field auto-populates.)

R. Click Next.

S. Click Next.

T. Click Save to add the field to the page layout.

3. (Sandbox) Populate approval matrix with approvers for all five departments.

A. Click the Position Approval Matrices tab. (Click + to see more tabs, if necessary.)

B. Click New, then use the lookup icons to select the approvers.

i. Approver #1: Amy Daniels

ii. Approver #2: Alan Wong

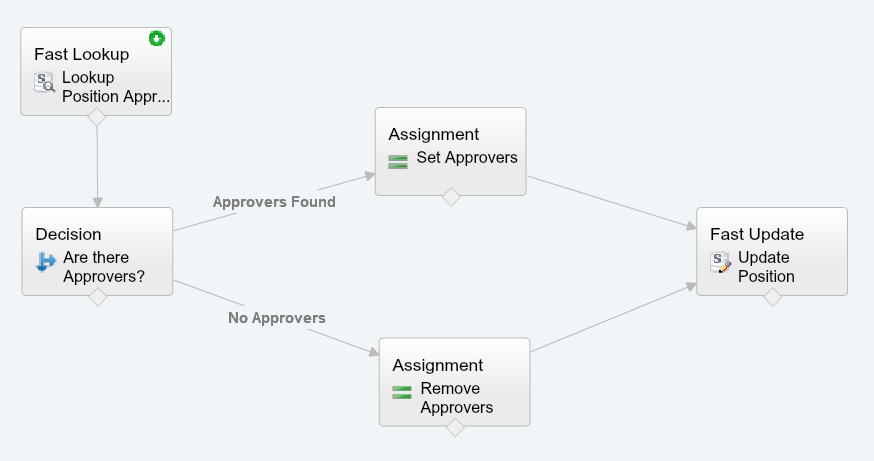
iii. Approver #3:Allison Wheeler

iv. Department: Engineering

C. Click Save & New.

D. Repeat the process for the remaining four departments: IT, Finance, Support, and Sales. Pick three different approvers for each department–it doesn’t matter which users you choose. You should end up with a total of five records.

4. (Sandbox) Create Flow to copy approvers from Position Approval Matrix to Position based on department.



. Click Setup | Create | Workflow & Approvals | Flows.

. Click New Flow.

. Click the **Resources** tab (near the upper left corner of the Flow Designer).

. Under CREATE NEW, double-click SObject Variable.

. Unique Name: sobjPosition

. Input/Output Type: Input and Output

. Object Type: Position\_\_c

. Click OK.

. Click the **Palette** tab.

. Drag and drop Fast Lookup from the palette onto the flow window.

. In the Name field, enter Lookup Position Approvers (Unique Name auto-populates.)

. For Lookup, select Position\_Approval\_Matrix\_\_c from the CUSTOM object list.

. Use this criteria:

a. Field: Department\_\_c

b. Operator: equals

c. Value: SOBJECT VARIABLES | sobjPosition | Department\_\_c

. For Variable, choose: CREATE NEW | SObject Variable | …

. Unique Name: sobjPositionApprovers

. Input/Output Type: Input and Output

. Object Type: Position\_Approval\_Matrix\_\_c

. Click OK.

. Under Specify which of the record’s fields to save in the variable, click Add Row twice, then enter each of the following:

a. Approver\_1\_\_c

b. Approver\_2\_\_c

c. Approver\_3\_\_c

. Click OK.

. Click the green Set as Start Element icon on the Lookup Position Approvers screen.

. Click Save and name the Flow Position Dynamic Approval. (Unique Name auto-populates.) Make sure Type is set to Autolaunched Flow and Click OK. Click OK on the General Warning screen.

. Drag and drop Decision from the palette onto the flow window.

i. In the Name field, enter Are there Approvers? (Unique Name auto-populates.)

ii. Under Outcomes, complete the following fields:

a. Name: No Approvers (Unique Name auto-populates.)

Resource: SOBJECT VARIABLES | sobjPositionApprovers

b. Operator: is null

c. Value: GLOBAL CONSTANT | $GlobalConstant.True

iii. Click the Default Outcome and change the name to Approvers Found.

iv. Click OK.

v. Connect the Are There Approvers? element to make it come right after the Lookup Position Approvers element in the Flow.

vi. Click Save.

. Drag and drop Assignment from the palette onto the flow window.

i. In the Name field, enter Set Approvers (Unique Name auto-populates.)

ii. Under Assignments, complete the following fields:

a. Variable: SOBJECT VARIABLES | sobjPosition | Approver\_1\_\_c

b. Operator: equals

c. Value: SOBJECT VARIABLES | sobjPositionApprovers | Approver\_1\_\_c

iii. Click Add Assignment, then complete the following fields:

a. Variable: SOBJECT VARIABLES | sobjPosition | Approver\_2\_\_c

b. Operator: equals

c. Value: SOBJECT VARIABLES | sobjPositionApprovers | Approver\_2\_\_c

iv. Click Add Assignment, then complete the following fields:

a. Variable: SOBJECT VARIABLES | sobjPosition | Approver\_3\_\_c

b. Operator: equals

c. Value: SOBJECT VARIABLES | sobjPositionApprovers | Approver\_3\_\_c

v. Click OK.

vi. Connect the Set Approvers element to make it come right after the Are there Approvers? element in the Flow. When prompted for Decision Routing, specify to go to this element if outcome is Approvers Found.

vii. Click Save.

. Drag and drop Assignment from the palette onto the flow window.

i. In the Name field, enter Remove Approvers (Unique Name auto-populates.)

ii. Under Assignments, complete the following fields:

a. Variable: SOBJECT VARIABLES | sobjPosition | Approver\_1\_\_c

b. Operator: equals

c. Value: GLOBAL CONSTANT | EmptyString

iii. Click Add Assignment, then complete the following fields:

a. Variable: SOBJECT VARIABLES | sobjPosition | Approver\_2\_\_c

b. Operator: equals

c. Value: GLOBAL CONSTANT | EmptyString

iv. Click Add Assignment, then complete the following fields:

a. Variable: SOBJECT VARIABLES | sobjPosition | Approver\_3\_\_c

b. Operator: equals

c. Value: GLOBAL CONSTANT | EmptyString

v. Click OK.

vi. Connect the Remove Approvers element to make it come right after the Are there Approvers? element as the second option.

vii. Click Save.

. Drag and drop Fast Update from the palette onto the flow window.

i. In the Name field, enter Update Position (Unique Name auto-populates.)

ii. Under Assignments, select the variable as:

a. SOBJECT VARIABLES | sobjPosition

iii. Click OK.

iv. Connect the Set Approvers element to the Update Position element.

v. Connect the Remove Approvers element to the Update Position element.

vi. Click Save.

. Click Close.Under Flow Versions, click Activate next to Version 1.

5. (Sandbox) Create a Lightning Process to call Flow for new or updated Positions.

A. Click Setup | Create | Workflow & Approvals | Process Builder.

B. Click New.

C. Define the process properties.

i. Name: Position Dynamic Approval Process

ii. The process starts when: a record changes

iii. Click Save.

D. Click + Add Object.

i. Object: Position

ii. Start the process: when a record is created or edited

E. Click Save.

F. Click + Add Criteria.

i. Criteria Name: New Record or Department Change

ii. Criteria for Executing Actions: Formula evaluated to true: ISCHANGED([Position\_\_c].Department\_\_c ) || ISNEW()

G. Click Save.

H. Under IMMEDIATE ACTIONS, click + Add Action.

i. Action Type: Flows

ii. Action Name: Set Approvers

iii. Flow: Position Dynamic Approval

iv. Flow Variables (Add Row):

a. Flow Variable: sobjPosition

b. Type: Field Reference

c. Value: Lookup | **Select Position\_\_c record that started your process** |

Choose

v. Click Save.

I. Click Activate and Confirm, then click Back to Setup.

6. (Sandbox) Test the Autolaunched Flow.

A. Open any Position.

7. Change the Department to either Sales or Support, then save the record. Did the approvers automatically get set according to the corresponding record in the Position Approval Matrix object?

7-1: Deploy Changes Using Change Sets

1. (Production) Change the deployment connection to allow inbound changes.

A. Click Setup | Deployment Settings.

B. Select the Don’t show this page again checkbox, and click Continue.

C. Click Edit next to TestOrg.

D. Select the Allow Inbound Changes checkbox.

E. Click Save.

2. (Sandbox) Create and upload an outbound change set called Business Process Automation Changes.

A. Click Setup | Outbound Change Sets.

B. Select the Don’t show this page again checkbox, and click Continue.

C. Click New and enter the details:

|  |  |
| --- | --- |
| Name: | Business Process Automation Changes |
| Description: | Includes Approval Process, Lightning Processes, and Flows |

D. Click Save.

E. Add custom fields used in the Approval Process.

i. In the Change Set Componentssection, click Add.

ii. From the Component Type picklist, select Custom Field.

iii. Select the checkboxes for Approver #1, Approver #2, and Approver #3 fields for both the Position and Position\_Approval\_Matrix objects (should include 6 components total).

iv. Select the checkbox for the **Department** field for the Position Approval Matrix   
object.

v. Click Add To Change Set.

vii. Scroll down and click Add Profiles.

viii. Check the box at the top of the list to select all profiles.

viiii Click Add To Change Set.

F. Add the page layout with new custom fields.

i. In the Change Set Componentssection, click Add.

ii. From the Component Type picklist, select Page Layout.

iii. Click P in the alphabetical locator.

iiiv. Select the checkbox for the Position Layout and the **Position Approval Matrix Layout**.

v. Click Add To Change Set.

G. Add the Position Approval Matrix custom object and tab.

i. In the Change Set Componentssection, click Add.

ii. From the Component Type picklist, select Custom Object.

iii. Select the checkbox for Position Approval Matrix.

iv. Click Add To Change Set.

v. In the Change Set Componentssection, click Add.

vi. From the Component Type picklist, select Tab.

vii. Select the checkbox for Position Approval Matrix.

viii. Click Add To Change Set.

H. Add the Approval Process component.

i. In the Change Set Componentssection, click Add.

ii. From the Component Type picklist, select Approval Process.

iii. Select the checkbox for New Position Approval.

iv. Click Add To Change Set.

v. In the Change Set Components section, click View/Add Dependencies.

vi. Select the checkboxes for all Field Updates and Email Alerts referenced by New

Position Approval(should include 8 componentstotal).

vii. Click Add To Change Set.

I. Add the Lightning Process Builder and Visual Workflow components.

i. In the Change Set Componentssection, click Add.

ii. From the Component Type picklist, select Flow Definition.

iii. Select the checkboxes for Create Interviewer Record, Position DynamicApproval, Submit Position for Approval, and Position Dynamic Approval Process.

iv. Click Add To Change Set.

J. Upload the outbound change set to production.

i. Click Upload.

ii. Select the radio button for the Production organization.

iii. Click Upload.

K. In your sandbox org, click Your Name | Logout, and close the browser tab where you were viewing the sandbox.

3. (Production) Validate and deploy the inbound change set called Business Process Automation Changes.  
Note: You may need to wait approximately 5 minutes before your inbound change set will be ready for Production (can take up to 30 minutes).

A. Click Setup | Inbound Change Sets.

B. Click Business Process Automation Changes.

C. Click Validate.

D. Select the radio button for Default.

E. Click Validate and then click OK.

F. Refresh the browser and verify that the validation only deployment succeeded.

G. Click Deploy.

H. Select the radio button for Default.

I. Click Deploy and then click OK.

J. Refresh the browser and verify that the deployment succeeded.

7-2: Test Changes in Production

1. Activate Lightning Processes.

A. If Lightning Processes aren’t activated, follow these steps: Click Setup | Create | Workflow & Approvals | Process Builder | Create Interviewer Record | Activate | Confirm | Back To Setup.

B. Repeat step A, but instead of Create Interviewer Record, select Submit New Positions for Approval.

C. Repeat step A again, but instead of Create Interviewer Record, select Position Dynamic Approval Process.

2. Activate the Flow.

A. Click Setup | Create | Workflow & Approvals | Flows | Dynamic Position Approval | Activate (Version 1).

3. Test the Create Interviewer Record process by creating a position and confirming that an Interviewer Record was created. Note: Remember to enter a Hiring Manager, since the Process Builder criteria was that Hiring Manager is not blank.

4. Run the flow.

A. Click the Job Application tab.

B. Click Go next to View in the tab.

C. Click on a Job Application record.  
D. Click the New Review record button.  
E. Fill in all the fields with data and click Next.F. From the recent items in the sidebar, click the Job Application record at the top of

the list.

G. Reference the created Review record in the related list by clicking on the Review

record.

5. Test the Position Dynamic Approval Process by changing Department and confirming appropriate approvers are listed. Don’t forget to create Positions Approval Matrix Records.

6. Test the Submit Positions for Approval Process by creating a position that meets the criteria of the process.

8-1: Create Custom Report Types (Including Fields from Related Objects)

1. Create a folder to store recruiting reports.

A. Click the Reportstab.

B. Click the arrow next to the Folder search bar and select New Report Folder.

i. Report Folder Label:Recruiting Reports

ii. Folder Unique Name**:** Recruiting\_Reports

C. Click Save.

D. Share the folder with the recruiter Noah Larkin, giving him Editor access.

2. Create a new custom report type.

A. Click Setup | Create | Report Types.

B. Select Don’t show me this page again (if desired).

C. Click Continue.

D. Click New Custom Report Type.

i. Primary Object:Candidates

ii. Report Type Label:Candidates with Interviewers

iii. Report Type Name:Candidates\_with\_Interviewers

iv. Description:This report shows candidates with information about each of the individuals who interviewed them.

v. Store in Category:Other Reports

vi. Deployment Status:Deployed

E. Click Next.

F. Click to relate another object, then select Job Applications.

i. Leave the relationship set to Each ‘A’ record must have at least one related ‘B’ record.

G. Click to relate another object, then select Reviews.

i. Leave the relationship set to Each ‘B’ record must have at least one related ‘C’ record.

H. Click Save.

I. Click Edit Layout.

i. On the right side of the page, set the View to Reviews Fields.

ii. Click the Add fields related via lookuplink.

iii. Click Interviewer, then click the View related fieldslink next to Employee, then select:

a. Full Name

b. Department

c. Role

d. Title

iv. Click OK.

v. Click Create New Section.

a. Name:Interviewer Information

b. Click OK.

vi. Drag Full Name,Role,Department,and Titlefrom the Reviews section into the Interviewer Information section.

J. Click Save.

3. Create a new report that utilizes the new custom report type.

A. Click the Reportstab.

B. Click New Report.

C. Click the plus sign (+) next to Other Reports.

D. Highlight Candidates with Interviewers(you may need to click Show More).

E. Click Create.

F. Drag and drop the following columns onto the report preview:

i. First Name

ii. Last Name

iii. Position: Title

iv. Number of Reviews

iv. Average Review Score

v. Interviewer: Employee: Full Name

vi. Interviewer: Employee: Department

vii. Interviewer: Employee: Role: Name

viii. Interviewer: Employee: Title

G. Select Summary Format.

H. Drag the Candidate Numberfield onto the section that says Drop a field here to create a grouping.

I. Select the filters for your report.

i. Show:All candidates

ii. Range:All Time

J. Click Run Report.

K. Click Save As.

i. Report Name:Candidates with Interviewers

ii. Report Description: Who are the employees that interviewed each candidate?

iii. Report Unique Name: Candidates\_with\_Interviewers

iv. Report Folder: Recruiting Reports

L. Click Save.

8-2: Create Custom Report Types (using the “With or Without” Framework)

1. Create a new custom report type.

A. Click Setup | Create | Report Types.

B. Click New Custom Report Type.

i. Primary Object:Positions

ii. Report Type Label:Positions with or without Job Applications

iii. Report Type Name:Positions\_with\_or\_without\_Job\_Applications

iv. Description:This report shows all positions. If there is a related job application, it also shows the details of that job application.

v. Store in Category:Other Reports

vi. Deployment Status:Deployed

C. Click Next.

D. Click to relate another object, then select Job Applications.

i. Set the relationship to set to ‘A’ records may or may not have related ‘B’ records.

E. Click Save.

F. Create a new report utilizing the new custom report type.

G. Click the Reportstab.

H. Click New Report.

I. Click the plus sign (+) next to Other Reports.

J. Highlight Positions with or without Job Applications.

K. Click Create.

L. Drag and drop the following columns onto the report preview:

i. Department

ii. Number of Reviews

iii. Average Review Score

M. Select Summary Format.

i. Drag the Titlefield onto the section that says Drop a field here to create a grouping.

N. Select the filters for your report.

i. Show: All positions

ii. Range: All Time

O. Click Run Report.

P. Click **Save As**.

i. Report Name:Positions w/ or w/o Job Applications

ii. Report Description:Shows a list of all positions, and if there is a related job application, it also shows the job application.

iii. Report Unique Name: Positions\_w\_or\_w\_o\_Job\_Applications

iv. Report Folder:Recruiting Reports

Q. Click **Save**.

8-3: Create Reports for Counting

1. Create a new formula field to count the number of job applications.

A. Click Setup | Create | Objects | Job Application.

B. Under Custom Fields & Relationships, click New.

i. Data Type:Formula

C. Click Next.

i. Field Label: Number of Job Applications

ii. Field Name: Number\_of\_Job\_Applications

iii. Formula Return Type: Number

iv. Number of Decimals: 0

D. Click Next.

i. Enter Formula: 1

E. Click Next.

F. Make the field visible to all profiles, click Next.

i. Deselect the box to include the field on the Job Application Layout.

G. Click Save.

2. Add the new Number of Job Applications field to the Custom Report Type, Positions with or without Job Applications.

A. Click Setup | Create | Report Types | Positions with or without Job Applications.

B. Click Edit Layout.

C. Change the View drop-down to Job Applications Fields, then drag and drop the Number of Job Applications field on to the Positions section of the page layout.

D. Click Save.

3. Update the Positions with or without Job Applicationsreport to include this new field.

### A. Click the Reportstab.

### B. Under Recruiting Reports,click Positions w/ or w/out Job Applications.

### C. Click Customize.

#### i. Drag and drop the Number of Job Applications column onto the report preview.

#### ii. Click the arrow next to the Number of Job Applicationsfield, then select Summarize this field, then check Sum and click Apply.

#### iii. Click Run Report.

### D. Note how the Number of Job Applications is different than the Grand Total.

#### i. Click Save.

#### ii. Click Save.

8-4: Create a Custom Summary Formula

1. Create a new formula field to count the number of positions.

A. Click Setup | Create | Objects | Position.

B. Under Custom Fields & Relationships, click New.

i. DataType:Formula

C. Click Next.

i. Field Label: Number of Positions

ii. Field Name: Number\_of\_Positions

iii. Formula Return Type: Number

iv. Decimal Places: 0

### D. Click Next.

#### i. Enter Formula: 1

### E. Click Next.

### F. Make the field visible to all profiles, click Next.

#### i. Deselect the boxes so the field is not included on any of the Position layouts.

### G. Click Save.

## 2. Add the new Number of Positions field to the Custom Report Type, Positions with or without Job Applications.

### A. Click Setup | Create | Report Types | Positions with or without Job Applications.

### B. Click Edit Layout.

### C. Drag and drop the Number of Positionsfield on to the page layout.

### D. Click Save.

## 3. Create a custom summary formula on the existing Positions w/ or w/out Job Applications report.

### A. Click the Reportstab.

### B. Click Positions w/ or w/o Job Applications.

### C. Click Customize.

### D. Double-click Add Formulafrom the fields pane.

#### i. Column Name:Average Number of Job Apps

#### ii. Format: Number

#### iii. Where will this formula be displayed?: All summary levels

#### iv. Formula:Job\_Application\_\_c.Number\_of\_Job\_Applications\_\_c:SUM/Position\_\_c.Number\_of\_Positions\_\_c:SUM

#### v. Click OK.

E. Drag and drop the Number of Positionsfield onto the report preview.

F. Click the arrow next to the Number of Job Applicationsfield, then select Summarize this field, then check Sum and click Apply.

G. Click Run Report.

H. Click Hide Detailsto show only the summary rows of the report.

I. Note the Average Number of Job Apps.

J. Click Save, leave the name, description and folder the same, then click Saveagain.

8-5: Create a New Custom Report and Dashboard

1. Create a new custom report.

A. Click the Reportstab.

B. Click New Report.

i. Click the plus sign (+) next to Other Reports.

ii. Highlight Positions.

C. Click Create.

D. Drag and drop the following columns onto the report preview:

i. Status

ii. Hiring Manager

E. Select Summary Format.

F. Drag the Departmentfield onto the section that says Drop a field here to create a grouping.

G. Select the filters for your report.

i. Show: All positions

ii. Range: All Time

iii. Click Add | Field Filter

a. Status | equals | Open

iv. Click OK.

H. Click Run Report.

I. Save the report.

i. Click Save As.

a. Report Name: Open Positions by Department

b. Report Description: What positions are currently open?

c. Report Unique Name: Open\_Positions\_by\_Department

d. Report Folder: Unfiled Public Reports

J. Click Save.

2. Create a new dashboard.

A. Click the Dashboardstab.

B. Click the Go To Dashboard Listlink.

C. Click New Dashboard(if you see a pop-up, click No Thanksor Show Me Later).

D. Add a component to the dashboard.

i. Click the Vertical Bar Chart(from the Components tab) and drag and drop it onto the left-hand column.

ii. Click Edit Header,then enter the header Open Positions by Department.

iii. Click the Data Sourcestab.

iv. Start typing Open Positions by Department into the Quick Find bar.

ii. Once the report displays in the search results below, drag and drop it onto your Vertical Bar Charton the canvas.

E. Click Save.

i. Title:Recruiting Dashboard

ii. Dashboard Unique Name:Recruiting\_Dashboard

ii. Save to:Company Dashboards

F. Select Close. Then select Save & Close.

3. Add components to the dashboard.

A. Create another report to use on the recruiting dashboard by clicking the Reportstab.

i. Click New Report.

ii. Open Other Reports.

iii. Highlight Job Applications with Reviews.

B. Click Create.

C. Drag and drop the following column onto the report preview:

i. Average Review Score

D. Select Summary Format.

E. Drag the Candidatefield onto the section that says Drop a field here to create a grouping.

F. Select the filters for your report.

i. Show:All job applications

ii. Range:All Time

G. Click Run Report.

H. Click Save As.

i. Report Name: Candidate Competency

ii. Report Description: How qualified are the candidates that my teams are interviewing?

iii. Report Unique Name: Candidate\_Competency

iv. Report Folder: Recruiting Reports

I. Click Save.

4. Add the new report as a component on your dashboard.

A. Click the Dashboardstab.

B. Click Edit.

i. Click the Vertical Bar Chart(from the Components tab) and drag and drop it onto the middle column.

ii. Click Edit Header,then enter the header Candidate Competency.

iii. Click the Data Sourcestab.

iv. Start typing Candidate Competency into the Quick Find bar.

v. Once the report displays in the search results below, drag and drop it onto your Vertical Bar Chart.

C. Click Save.Notice that the dashboard is showing a bar for each job application.

D. To update the dashboard component, so that it instead shows a bar for each average score, first click Closeand then Closeagain to exit the dashboard edit view. Then click on the new dashboard component. This will take you to the underlying report.

i. Change Summarize information by:Average Review Score

ii. Click Save.

iii. Click Saveagain.

E. Go back to the dashboard to see the change.

i. Click the Dashboardstab.

ii. Note that in the upper right-hand corner of the dashboard, you’ll see the words Refreshing Dashboardin red. Once the refresh is complete, note the change in the appearance of the dashboard component.

5. Schedule your dashboard for automatic refresh.

A. Click the arrow next to the Refreshbutton and select Schedule Refresh.

B. Email Dashboardsection: To me (Select), To others (Deselect)

C. Frequency: Weekly

D. Recurs every week on: Tuesday

E. Start: <today’s date>

F. End: <one week from today>

G. Next to Preferred Start Time, click the Find available options link.

H. Select 4:00 AM.

I. Click Save.