

- Metadata retrieval
- **SFDX Commands** help in pushing/pulling changes between local and org.

Outcome:

- Demonstrates modern Salesforce development practices.
- Enables easy tracking, version control, and deployment of all project components.
- I have imported all the data of salesforce in the vs code of connecting vs code to my org and pushed it in the project GitHub repository. This was Done by me in the previous phase only .

Phase 9: Reporting, Dashboards & Security Review

In this phase, the focus was on building insights, monitoring business processes, and ensuring data security within the Salesforce environment. The following tasks were implemented:

1. Reports

Different types of reports were created to analyse recruitment data and provide meaningful insights:

- **Tabular Reports:**
Simple record listings, such as a list of all Candidates or Job Applications.
- Simpler report on the active job opening

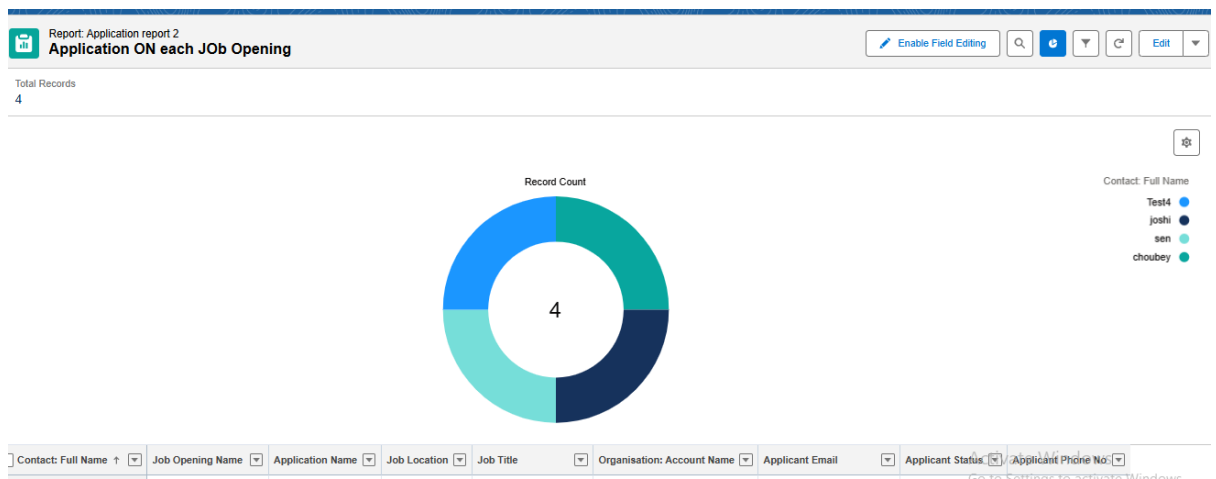
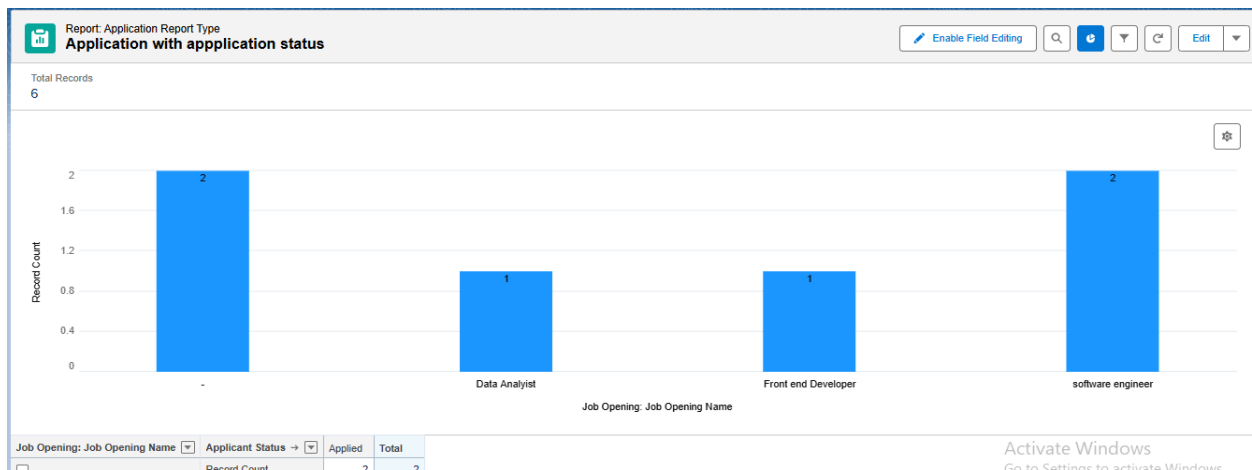
Report: Reports On Job Opening							
Report on Job Opening							
Total Records		Total No of openings		Total Salary Rate			
5		630		0			
	Job Opening Name	Application Deadline	Employment Type	Job Posting Date	No of openings	Organisation: Account Name	Salary Rate
1	software engineer	-	Fulltime	-	100	TCS	-
2	Software Developer	-	Fulltime	-	50	TCS	-
3	Front end Developer	02/10/2025, 12:00 pm	Fulltime	26/09/2025	120	Infosys	-
4	Data Analyst	30/09/2025, 12:00 pm	Fulltime	25/09/2025	210	congnizant	-
5	Data Scientist	01/10/2025, 12:00 pm	Fulltime	26/09/2025	150	Persistant	-
6					630		0

Report: Application Report Type Report On applications							
<div> <div>Enable Field Editing</div> <div>Q</div> <div>Add Chart</div> <div>▼</div> <div>↺</div> <div>Edit</div> </div>							
Total Records 6							
	Applicant Email	Applicant Status	Application Name	Application ID	Contact: Full Name	Job Opening: Job Opening Name	Application Submitted ON
1	-	Applied	std-0004	a01WU00001HULgN	sen	Front end Developer	-
2	ishanjatav06@gmail.com	Applied	std-0002	a01WU00001HQH1K	Test4	software engineer	-
3	-	Applied	a01WU00001GpXVz	a01WU00001GpXVz	Test3	-	-
4	-	Applied	std-0005	a01WU00001HULzB	choubey	software engineer	-
5	ishan@ishan.com	Applied	std-0001	a01WU00001GkbpF	-	-	-
6	-	Applied	std-0003	a01WU00001HULfq	joshi	Data Analyst	-

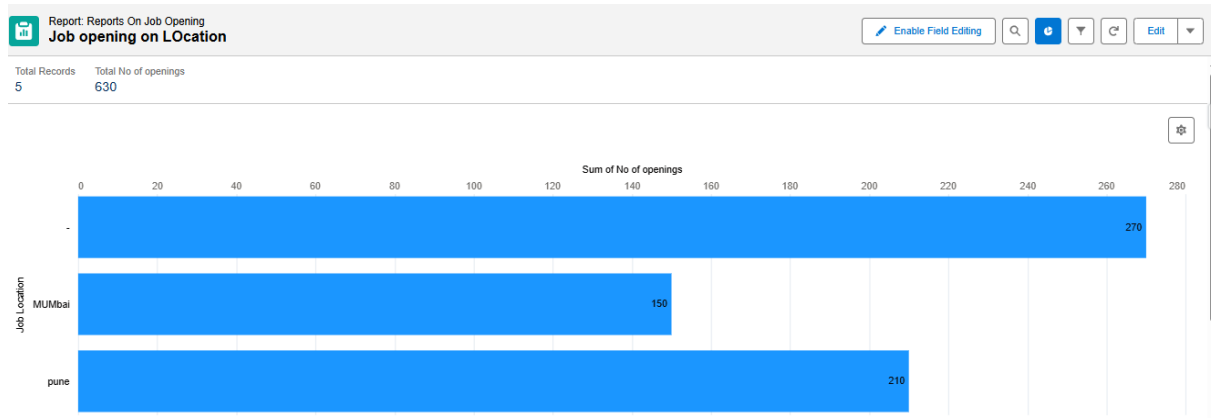
- Summary Reports:**

Applications grouped by **Job Posting** or **Status** to quickly visualize recruitment progress.

Application grouped by application Status



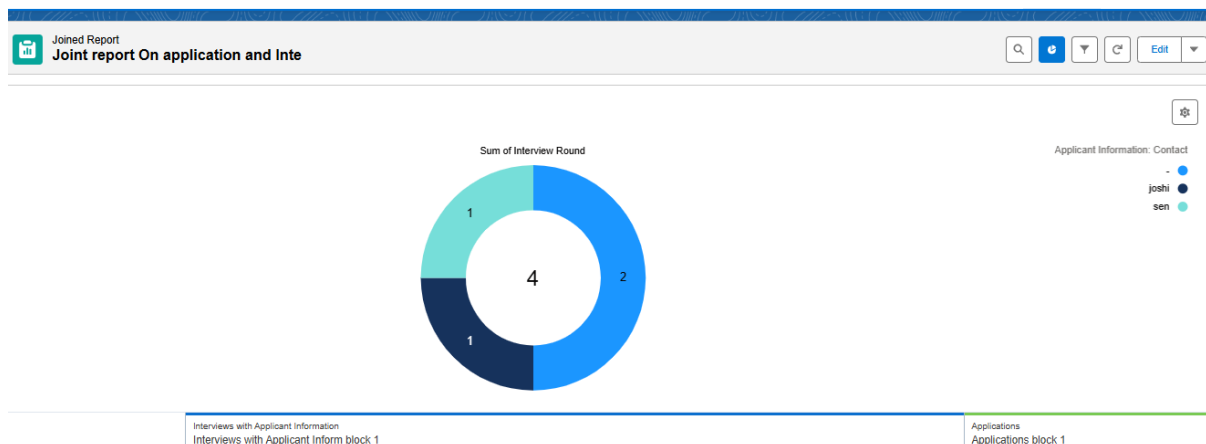
Applicaitions On each Job Opening



Job Opening Grouped by Location

- Matrix Reports:**
 Applications summarized by **Recruiter vs. Status**, giving a two-dimensional view of workload distribution.
- Joined Reports:**
 Applications and Interviews displayed together, helping track how many interviews were scheduled per application.

Joint Report on Application and Interview



2. Report Types

Custom Report Types were created to combine related objects such as:

- Applications with Job Postings**

Details

Display Label Application Report 1

API Name Application_Report_1

Description This another application report type

Created By HR Manager, 9/26/25, 9:29 AM

Store in Category other

Deployment Status Deployed

Modified By HR Manager, 9/26/25, 9:29 AM

Fields

Source Object	Included Fields
Applications	18
Interviews	20

Object Relationships

Applications (A)

... with at least one related record from Interviews (B)

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• Applications with Interviews

Details

Display Label Application report 2

API Name Application_report_2

Description Another Report Type for application

Created By HR Manager, 9/26/25, 9:52 AM

Store in Category other

Deployment Status Deployed

Modified By HR Manager, 9/26/25, 9:52 AM

Fields

Source Object	Included Fields
Job Openings	21
Applications	17

Object Relationships

Job Openings (A)

... with at least one related record from Applications (B)

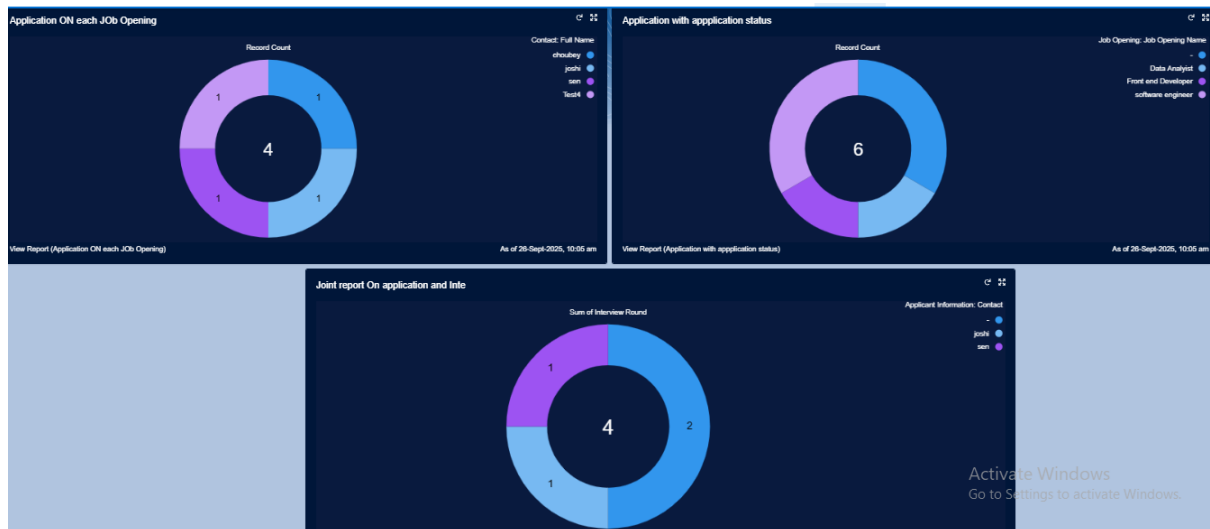
This enabled cross-object reporting to evaluate candidate progress throughout the hiring pipeline.

3. Dashboards

Dashboards were built to visually represent key recruitment KPIs:

- **Applications by Status** (Open, Approved, Rejected)
- **Applications per Job Posting**
- **Applications Selected for the interviews**

Each dashboard component provided recruiters with real-time insights into the hiring process.



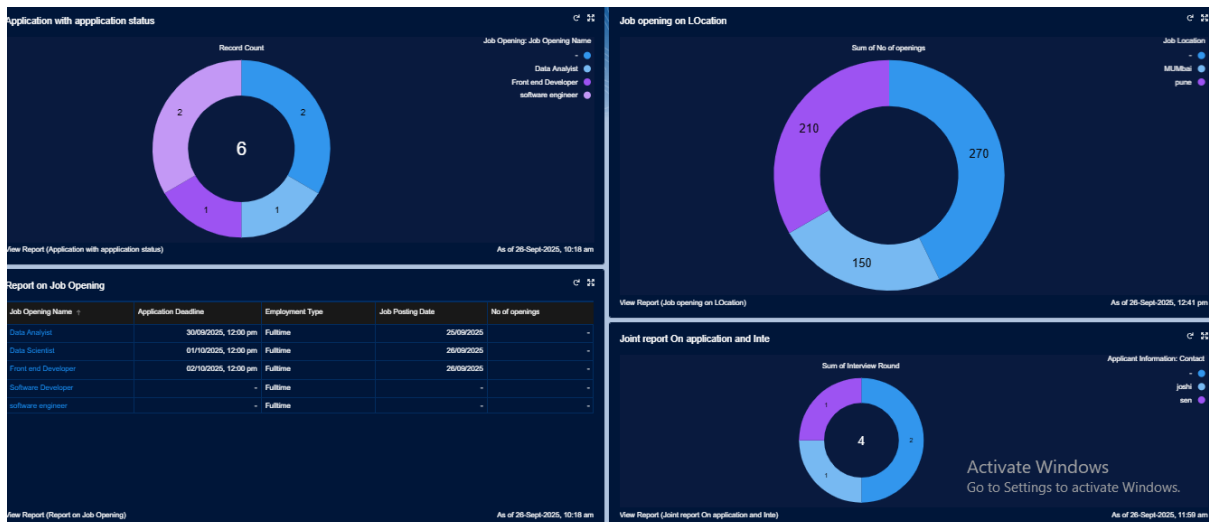
4. Dynamic Dashboards

Dynamic Dashboards were configured to ensure that users only see the data relevant to them. For example, if multiple recruiters are present, each recruiter would only see their own job applications and interviews. This was achieved by setting the dashboard

to run as the **logged-in user**, ensuring personalized views without the need for duplicate dashboards.

Dynamic Dashboard Includes

- **Application with application status**
- **Job opening with location**
- **Active job opening**
- **Applications selected for the interview**



5. Security Review


To ensure data integrity and compliance, several security measures were reviewed and implemented:

- **Sharing Settings:** Configured object-level and record-level access so that sensitive candidate and job data was only available to authorized users.
- I made application, interviews object private for the record level security and the job opening as public read only so the candidate can view the job opening.

Application	Private	Private	✓
Interview	Private	Private	✓
Job Opening	Controlled by Parent	Controlled by Parent	

- **Field-Level Security:** Restricted sensitive fields such as candidate contact details, ensuring only specific profiles could view or edit them. Hidden salary information from the external users.

Job salary field level security

 SETUP		
High Volume Customer Portal	<input type="checkbox"/>	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	<input type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - API Only Integrations	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input type="checkbox"/>	<input type="checkbox"/>
Salesforce API Only System Integrations	<input type="checkbox"/>	<input type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	
Work.com Only User	<input type="checkbox"/>	

Activate Windows
 Go to Settings to activate Windows.

- **Session Settings:** Enforced stricter login and session timeouts for security.
- **Login IP Ranges:** Configured IP restrictions for admin-level access, enhancing system security.
- **Audit Trail:** Enabled to keep track of all configuration changes, ensuring accountability and traceability.