Internal Job Application Management System CRM

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Phase 9:Reporting & Dashboards

Batch : 4

1.Overview

Phase 9 enhanced decision-making by creating reports and dashboards for application trends. With insights into status, job titles, and experience levels, HR managers could visualize the recruitment pipeline and measure outcomes effectively.

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2. Create Reports

Report 1: Applications by Education Qualification

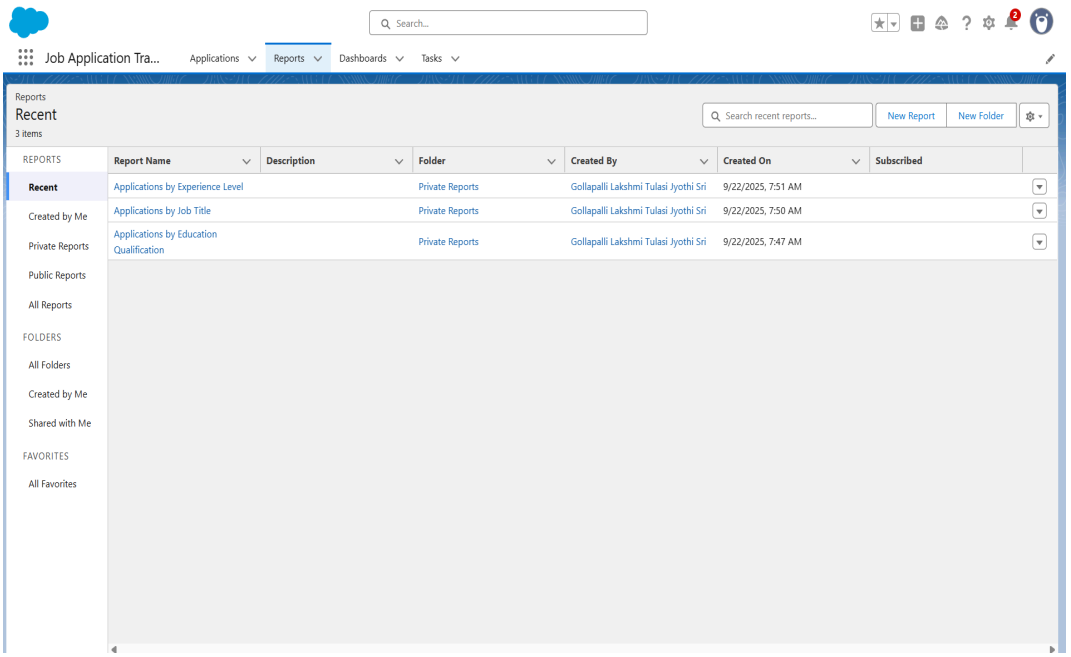
1. App Launcher → Reports → New Report.
2. Select Applications report type.
3. Add field Status__c.
4. Group rows by Status.
5. Save as: Applications by Status.

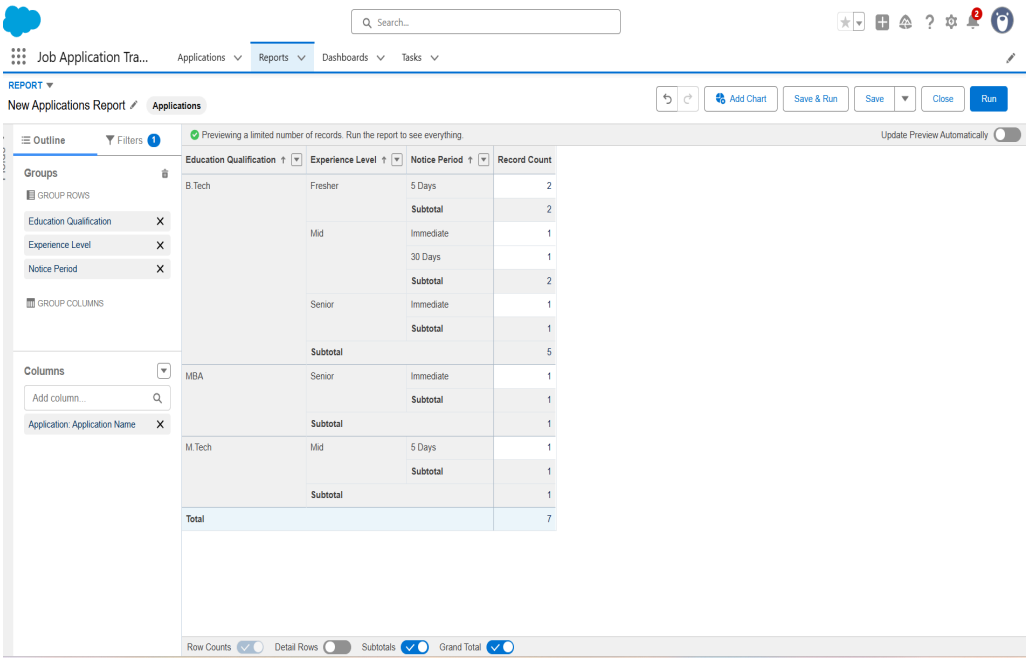
Report 2: Applications by Job Title

1. New Report → Applications.
2. Group rows by Job_Title__c.
3. Save as: Applications by Job Title.

Report 3: Applications by Experience Level

1. New Report → Applications.
2. Group rows by Experience_Level__c.
3. Save as: Applications by Experience Level.





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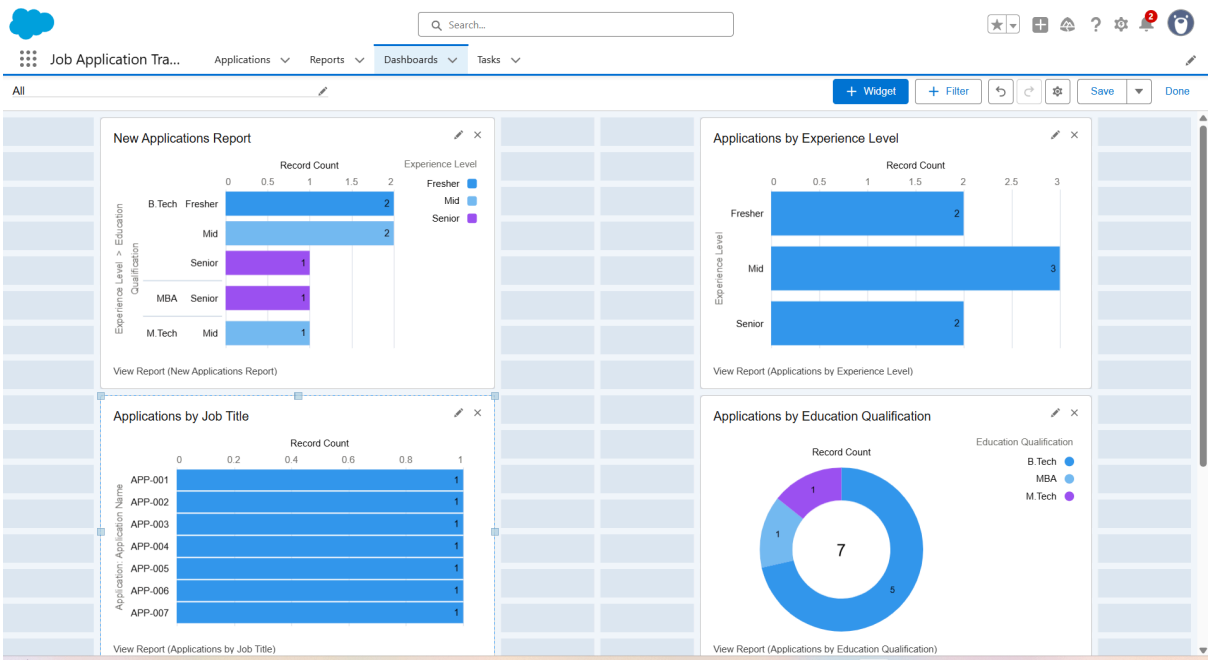
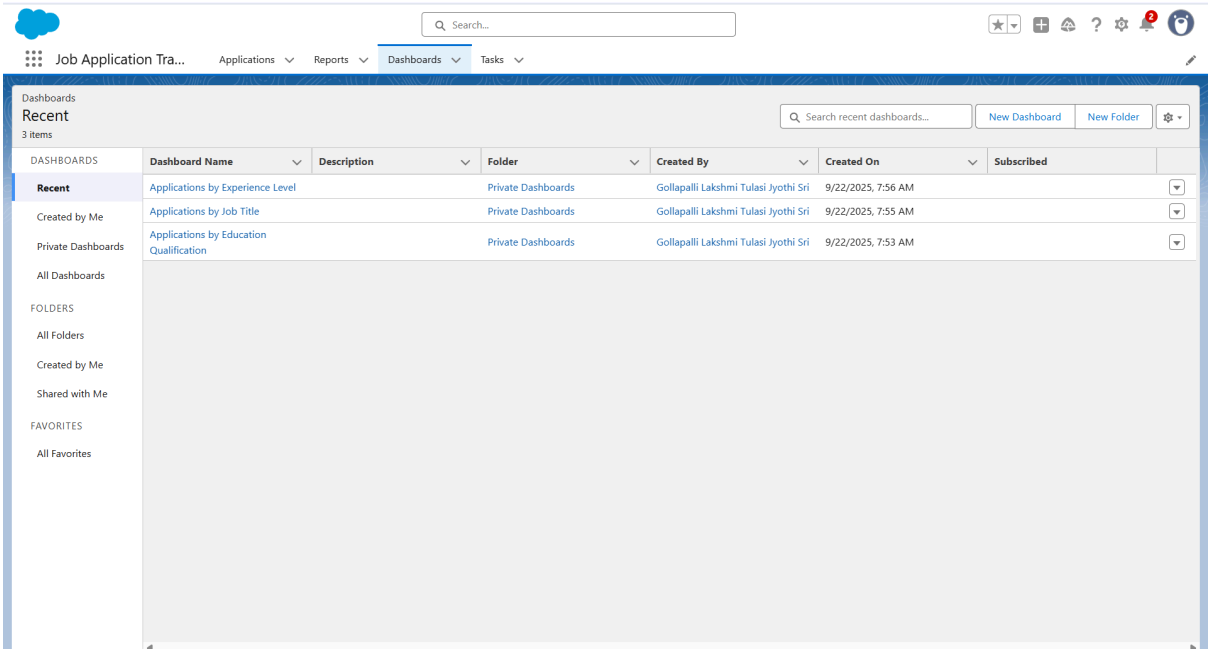
2. Create Dashboard

1. Go to App Launcher → Dashboards → New Dashboard.
2. Name: Job Application Dashboard.
3. Folder: Job Application Reports.
4. Add Components:
    - Pie Chart → from “Applications by Education Qualification”
    - Bar Chart → from “Applications by Job Title”
    - Donut Chart → from “Applications by Experience Level”
5. Save & Refresh.


Job Application Tra...
Applications
Reports
Dashboards
Tasks
All
Widget
Filter
Save
Done
New Applications Report
Record Count
Experience Level
Fresher
Mid
Senior
B.Tech Fresher
Mid
Senior
MBA Senior
M.Tech Mid
Experience Level > Education Qualification
View Report (New Applications Report)
Applications by Experience Level
Record Count
Fresher
Mid
Senior
Experience Level
View Report (Applications by Experience Level)
Applications by Job Title
Record Count
Application: Application Name
APP-001
APP-002
APP-003
APP-004
APP-005
APP-006
APP-007
View Report (Applications by Job Title)
Applications by Education Qualification
Record Count
Education Qualification
B.Tech
MBA
M.Tech
7
View Report (Applications by Education Qualification)


Job Application Tra...
Applications
Reports
Dashboards
Tasks
Dashboards
Recent
3 items
Search recent dashboards...
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Dashboard Name
Description
Folder
Created By
Created On
Subscribed
Applications by Experience Level
Private Dashboards
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Applications by Job Title
Private Dashboards
Gollapalli Lakshmi Tulasi Jyothi Sri
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Applications by Education Qualification
Private Dashboards
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Why

- HR insights & trends.
  Reports & Dashboard.
- Track applications by status, job, experience.
- Provided data insights & analytics while maintaining

Phase 9 Outcome:

- Built 3 Reports: Applications by Education Qualification, Applications by Job Title, Applications by Experience Level.

- Built a Job Application Dashboard with charts for quick visualization.

- Reviewed OWD, Roles, Profiles, and Sharing Rules to confirm security.