Internal Job Application Tracker – Phase 2 Progress Report

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Program: TCS Last Mile SmartBridge
Batch: 4
Phase: 2 – Org Setup & Configuration

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1. Overview

In Phase 2, **I have created the organizational setup and configurations** in Salesforce to ensure **secure access and proper visibility** of internal job applications. This phase forms the foundation for automation, reporting, and user access control.
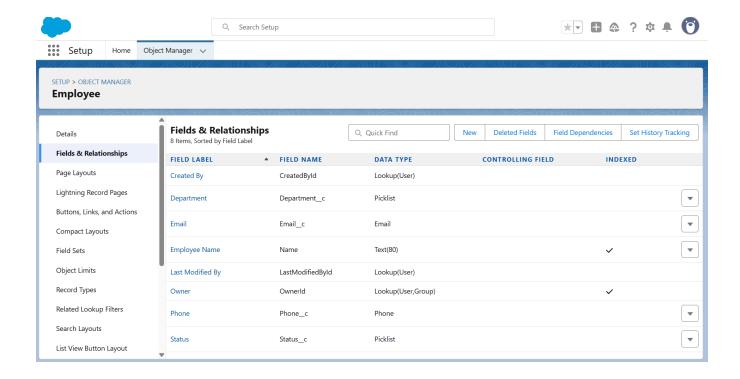
2. Steps Completed with Purpose & My Work

2.1 Custom Object & Fields (I Created)

- **Object:** Employee__c

- **Fields Created:**

    - Email (Email)

    - Phone (Phone)

    - Department (Picklist: HR, IT, Sales, Admin)

    - Status (Picklist: Applied, Interviewing, Selected, Rejected)

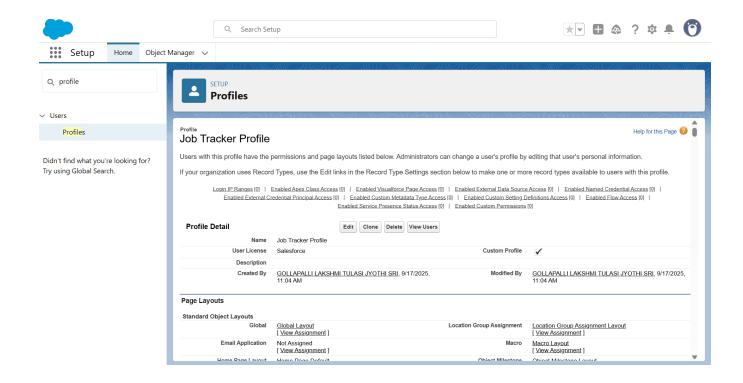**Purpose / Use:** To store all employee application details centrally.

2.2 Profiles & Roles (I Configured)

- **Profiles Created:**

    - HR Profile – full access to Employee records

    - Job Tracker Profile – access limited to own records

- **Roles Assigned:**

    - HR → Role to access all records

    - Job Tracker → Default role

- **Purpose / Use:** To **control data access** according to user responsibility.

- **Impact:** Ensures that HR can see all applications while employees see only their own.
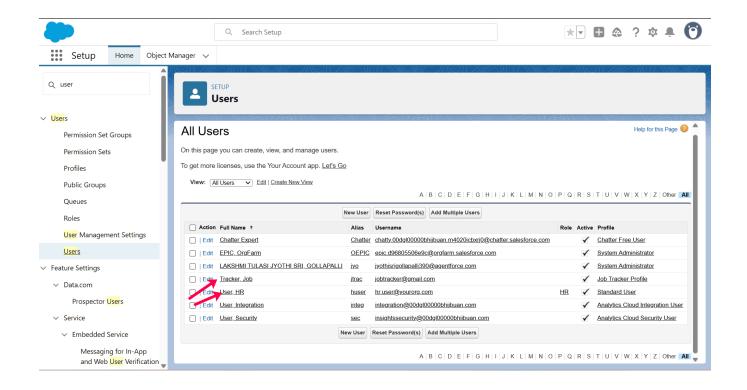
2.3 Org-Wide Defaults & Sharing Rules (I Configured)

- **OWD:** Private (Employee__c)

- **Sharing Rule:** SharewithHR → Read/Write for HR Role

- **Purpose / Use:** Ensures **confidentiality of application records** and shares with HR as needed.

- **Impact:** Protects data while allowing HR to review all records.

2.4 Sample Users (I Created)

- **HR User:** Can view/edit all Employee records

- **Job Tracker User:** Can create and view only own Employee records

- **Purpose / Use:** To **test the profiles, roles, and sharing rules**

- **Impact:** Confirms security and role-based access work as intended.

3. Benefits of This Phase

- Secures sensitive employee data

- Ensures correct visibility of records according to roles

- Provides foundation for automated processes and reporting and Demonstrates understanding of Salesforce admin setup

4. Outcome

- Employee object ready with necessary fields

- Profiles, roles, OWD, and sharing rules **successfully implemented by me**

- Sample users created for testing

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5. Conclusion

In Phase 2, **I configured the Salesforce environment** to ensure proper access, security, and visibility. This work allows the Internal Job Application Tracker to be **ready for automation, notifications, and reporting** in later phases. These steps demonstrate my understanding of **admin setup and configuration** in Salesforce