

Internal Job Application Tracker – Phase 2 Progress Report

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Program: TCS Last Mile SmartBridge

Batch: 4

Phase: 2 – Org Setup & Configuration

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.

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' (selected). Below this, the breadcrumb trail reads 'SETUP > OBJECT MANAGER' and the object name 'Employee' is displayed. The left sidebar contains a menu with options like 'Details', 'Fields & Relationships' (selected), 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', and 'List View Button Layout'. The main content area is titled 'Fields & Relationships' and shows a list of 8 fields, sorted by Field Label. The fields are: Created By, Department, Email, Employee Name, Last Modified By, Owner, Phone, and Status. Each field row includes its label, name, data type, controlling field, and an indexed status (checked or unchecked). There are also buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department	Department__c	Picklist		
Email	Email__c	Email		
Employee Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Status	Status__c	Picklist		

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.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profile' and a 'Users' section with 'Profiles' highlighted. The main content area is titled 'Profiles' and shows the 'Job Tracker Profile'. It includes a list of permissions (Login IP Ranges, Apex Class Access, Visualforce Page Access, External Data Source Access, Named Credential Access, External Credential Principal Access, Custom Metadata Type Access, Custom Setting Definitions Access, Flow Access, Service Presence Status Access, Custom Permissions) and a 'Profile Detail' table.

Profile Detail			
Name	Job Tracker Profile		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	GOLLAPALLI LAKSHMI TULASI JYOTHI SRI, 9/17/2025, 11:04 AM	Modified By	GOLLAPALLI LAKSHMI TULASI JYOTHI SRI, 9/17/2025, 11:04 AM

Below the profile details is a 'Page Layouts' section with a table showing assignments for Standard Object Layouts, Email Application, Home Page Layout, Location Group Assignment, Macro, and Object Milestone.

Page Layouts			
Standard Object Layouts	Global	Global Layout [View Assignment]	Location Group Assignment
			Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default	Object Milestone	Object Milestone Layout

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.

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar lists various setup options, with 'Users' selected. The main area displays a table of all users in the system. A red arrow points to the 'User_HR' entry in the table.

Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dgl00000bhjbuam.m4020icbxrj0@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIG	epic.d96805506e9c@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	LAKSHMI.TULASI.JYOTHI.SRI.GOLLAPALLI	jyo	jyothisrigollapalli390@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Tracker Job	jtrac	jobtracker@gmail.com		✓	Job Tracker Profile
<input type="checkbox"/> Edit	User_HR	huser	hr.user@yourorg.com	HR	✓	Standard User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dgl00000bhjbuam.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dgl00000bhjbuam.com		✓	Analytics Cloud Security User

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