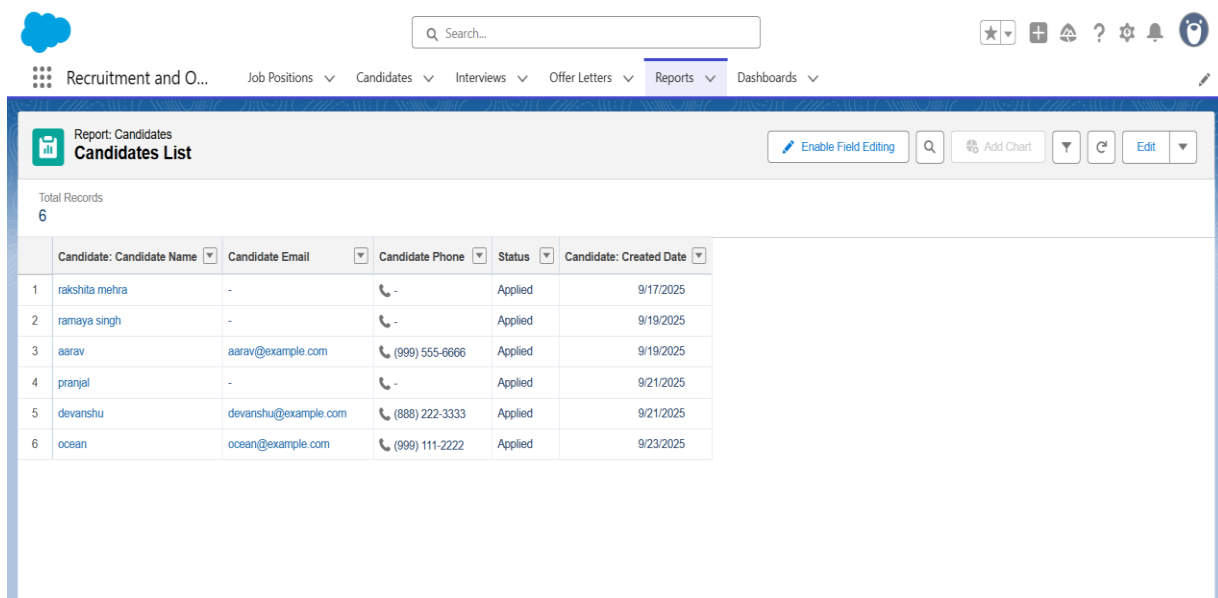


Phase 9 — Reporting, Dashboards & Security Review

1. Reports

- Candidates List (Tabular)
 - Configuration: Tabular report on Candidate__c showing Name, Email, Phone, Status, Created Date for quick audits.
 - Procedure: Reports → New Report → Candidates (or custom type) → Add listed fields → Filter Status = All → Save as “Candidates List.”
 - Screenshot:

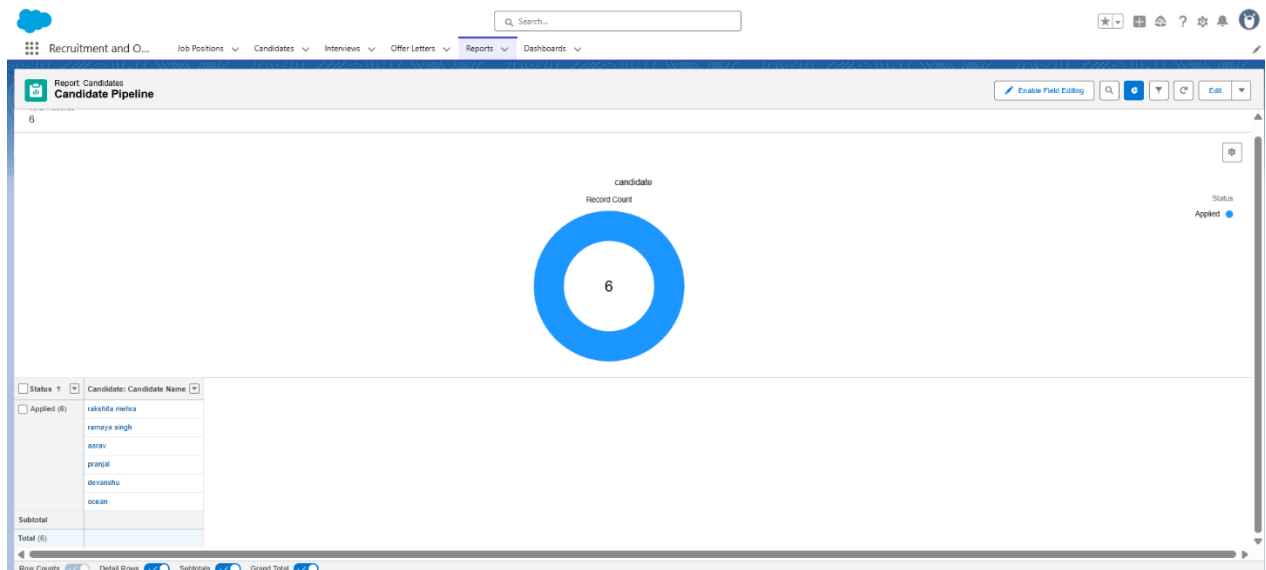


The screenshot shows the Salesforce Reports interface. At the top, there is a search bar and navigation tabs for Recruitment and O..., Job Positions, Candidates, Interviews, Offer Letters, Reports (selected), and Dashboards. Below the navigation, the report title is 'Report: Candidates' and 'Candidates List'. There are buttons for 'Enable Field Editing', 'Add Chart', and 'Edit'. The report shows 6 total records. The table below displays the data:

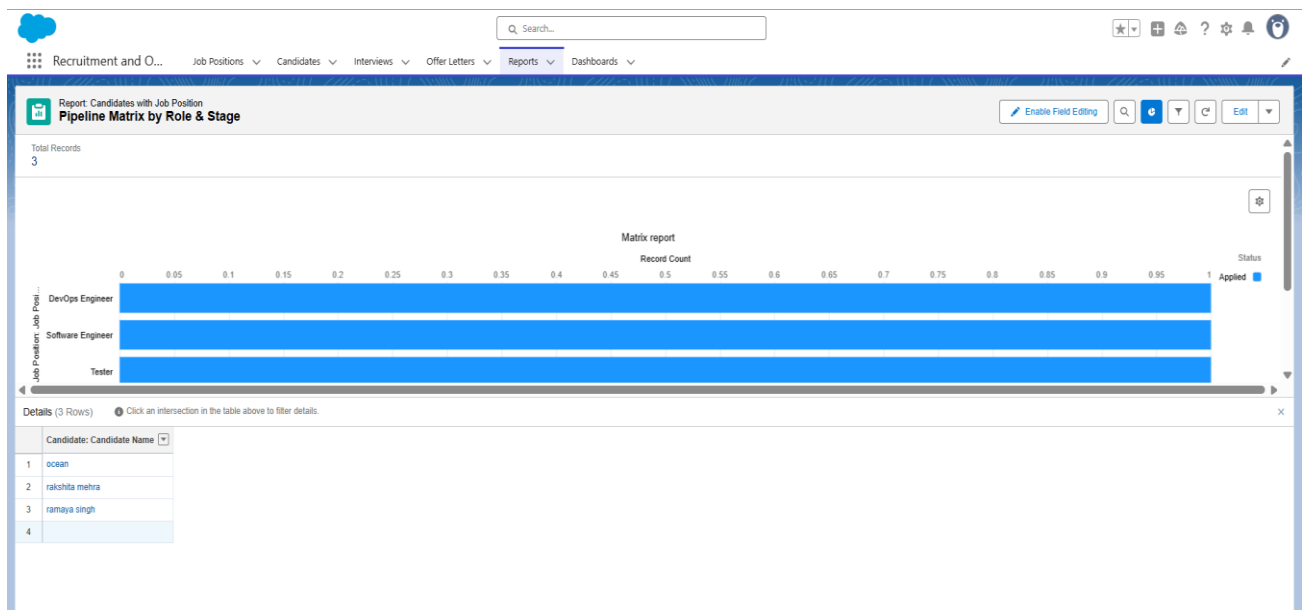
	Candidate: Candidate Name	Candidate Email	Candidate Phone	Status	Candidate: Created Date
1	rakshita mehra	-	-	Applied	9/17/2025
2	ramaya singh	-	-	Applied	9/19/2025
3	aarav	aarav@example.com	(999) 555-6666	Applied	9/19/2025
4	pranjal	-	-	Applied	9/21/2025
5	devanshu	devanshu@example.com	(888) 222-3333	Applied	9/21/2025
6	ocean	ocean@example.com	(999) 111-2222	Applied	9/23/2025

- Candidate Pipeline (Summary)
 - Configuration: Summary report grouped by Status to visualize pipeline counts; optional donut chart.
 - Procedure: Reports → New Report → Candidates → Group Rows by Status → Add chart (Donut) using Record Count → Save as “Candidate Pipeline.”

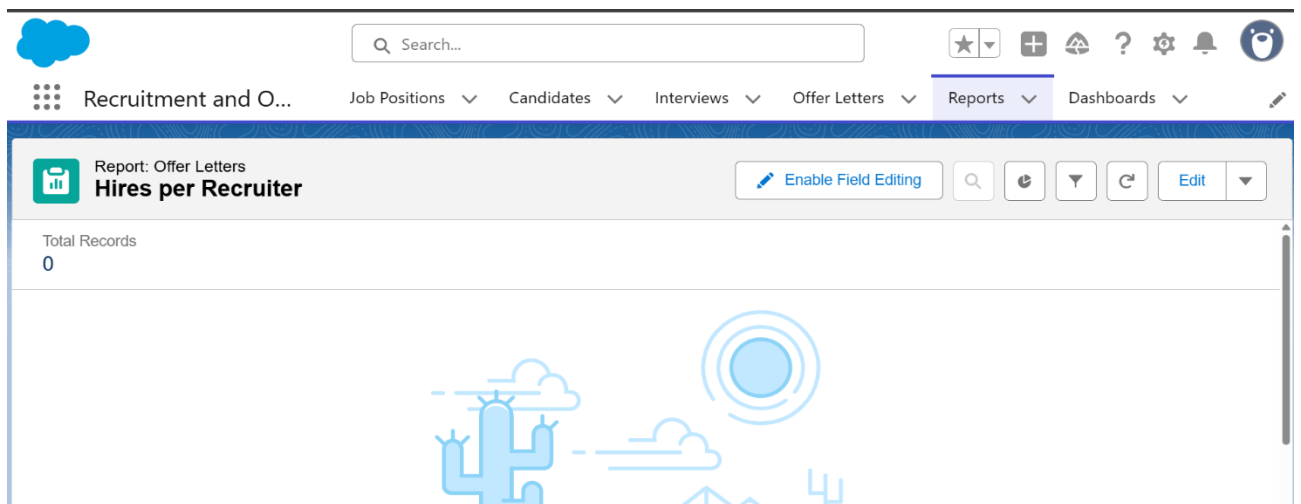
Screenshot:



- Pipeline Matrix by Role & Stage (Matrix)
 - Configuration: Matrix report using Candidates with Job Position report type; rows = Job Position, columns = Status; chart as stacked bars.
 - Procedure: Reports → New Report → Candidates with Job Position → Group Rows by Job Position → Group Columns by Status → Enable chart → Save as “Pipeline Matrix by Role & Stage.
 - Screenshot:



- Hires per Recruiter (Summary or Matrix)
 - Configuration: Report on Offer_Letter__c filtered to Status = Accepted; group by Owner (Recruiter) to count hires.
 - Procedure: Reports → New Report → Offer Letters → Filter Status = Accepted → Group by Owner → Add bar chart → Save as “Hires per Recruiter.”
 - Screenshot: Insert the Hires per Recruiter report canvas; counts may be zero in seed data.



2. Report Types

Not configured

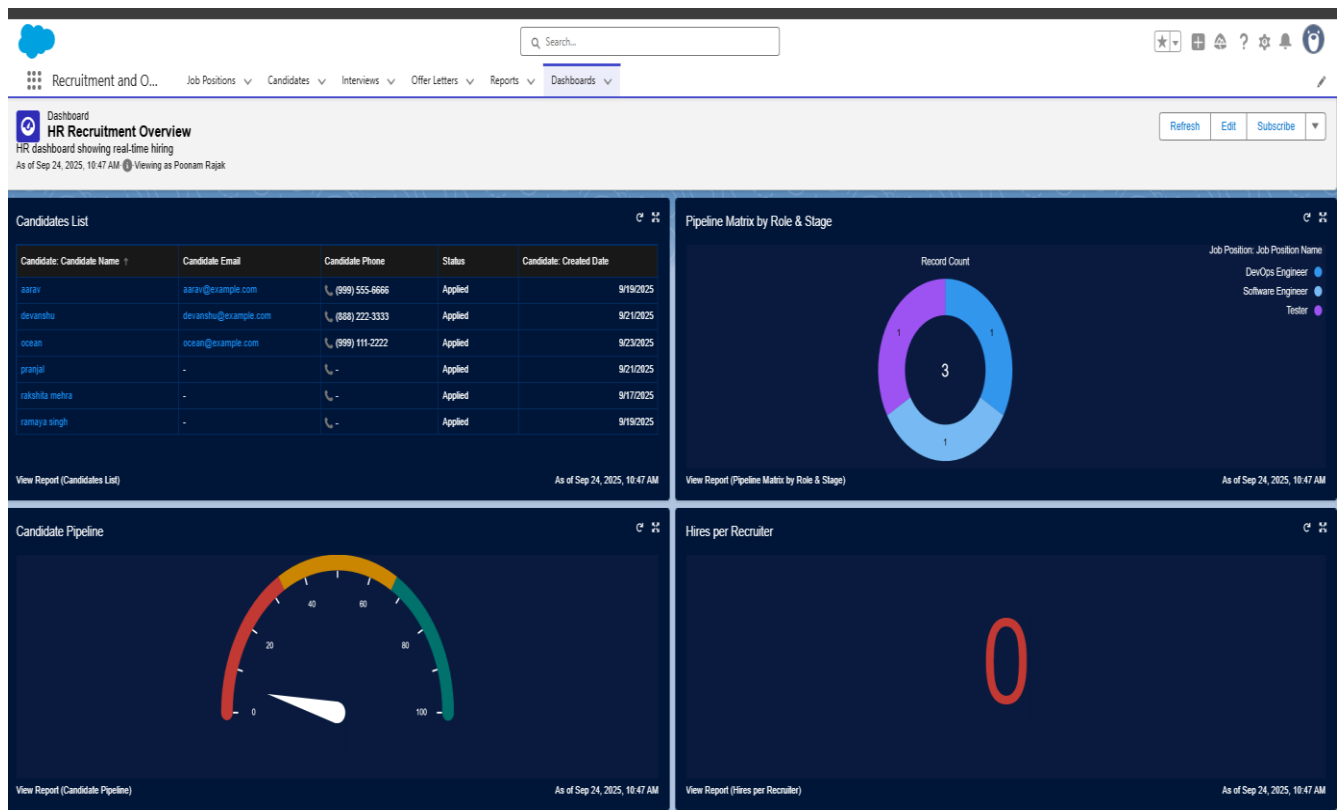
3. Dashboards

Configuration

- Dashboard “HR Recruitment Overview” built from the three saved reports: Candidates List, Pipeline Matrix by Role & Stage, Candidate Pipeline, and Hires per Recruiter; dashboard is set to run as viewer for role-based visibility.

- Procedure
 - Dashboards → New Dashboard → Add four components:
 - Table: Candidates List report to display latest candidates.
 - Donut: Pipeline Matrix by Role & Stage to visualize counts per role and stage.
 - Gauge: Candidate Pipeline to track overall pipeline count against target.
 - Metric: Hires per Recruiter to show accepted offers count.
 - Dashboard Properties → View as Logged-in User (dynamic) → Save and Refresh

Screenshot :



4.Sharing Settings

- Configuration
 - OWD for Candidate__c, Interview__c, Offer_Letter__c set appropriately (e.g., Private for Offers, Controlled by Parent where applicable).
- Procedure
 - Setup → Sharing Settings → Review OWD → Adjust as per HR model; confirm role hierarchy access.
- Screenshot
 - Sharing Settings of all 4 object

This screenshot shows the 'Sharing Settings' page for the 'Candidate' object in Salesforce. The page is titled 'Sharing Settings' and includes a sub-header 'This page displays your organization's sharing settings. These settings specify the level of access your users have to each other's data. Go to [Background Info](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

The 'Manage sharing settings for:' dropdown is set to 'Candidate'. Below this, there are sections for 'Default Sharing Settings', 'Organization-Wide Defaults', 'Other Settings', 'Sharing Rules', and 'Sharing Overrides'.

Organization-Wide Defaults: A table showing the default internal and external access levels for the 'Candidate' object. The 'Default Internal Access' is 'Private' and the 'Default External Access' is 'Private'. The 'Grant Access Using Hierarchies' checkbox is checked.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Candidate	Private	Private	<input checked="" type="checkbox"/>

Other Settings: A section with checkboxes for 'Manager Groups' (unchecked), 'Secure guest user record access' (checked), and 'Require permission to view record names in lookup fields' (unchecked).

Sharing Rules: A section titled 'Candidate Sharing Rules' with a 'New' button and a 'Recalculate' button. It shows a table with columns for 'Action', 'Criteria', 'Shared With', and 'Access Level'. One rule is listed: 'Owner in Role Hierarchy' with 'Read Only' access level.

Sharing Overrides: A section titled 'Profiles That Override Candidate Sharing' with a 'New' button and a 'Recalculate' button. It shows a table with columns for 'Profile', 'Custom Profile', 'View All Data', 'Organization-Wide Permissions', 'Modify All Data', 'View All Records', 'Candidate Permissions', and 'Modify All Records'. One profile is listed: 'Analytics Cloud Integration User' with 'Custom Profile' checked and 'View All Data' checked.

This screenshot shows the 'Sharing Settings' page for the 'Interview' object in Salesforce. The page is titled 'Sharing Settings' and includes a sub-header 'This page displays your organization's sharing settings. These settings specify the level of access your users have to each other's data. Go to [Background Info](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

The 'Manage sharing settings for:' dropdown is set to 'Interview'. Below this, there are sections for 'Default Sharing Settings', 'Organization-Wide Defaults', 'Other Settings', 'Sharing Rules', and 'Sharing Overrides'.

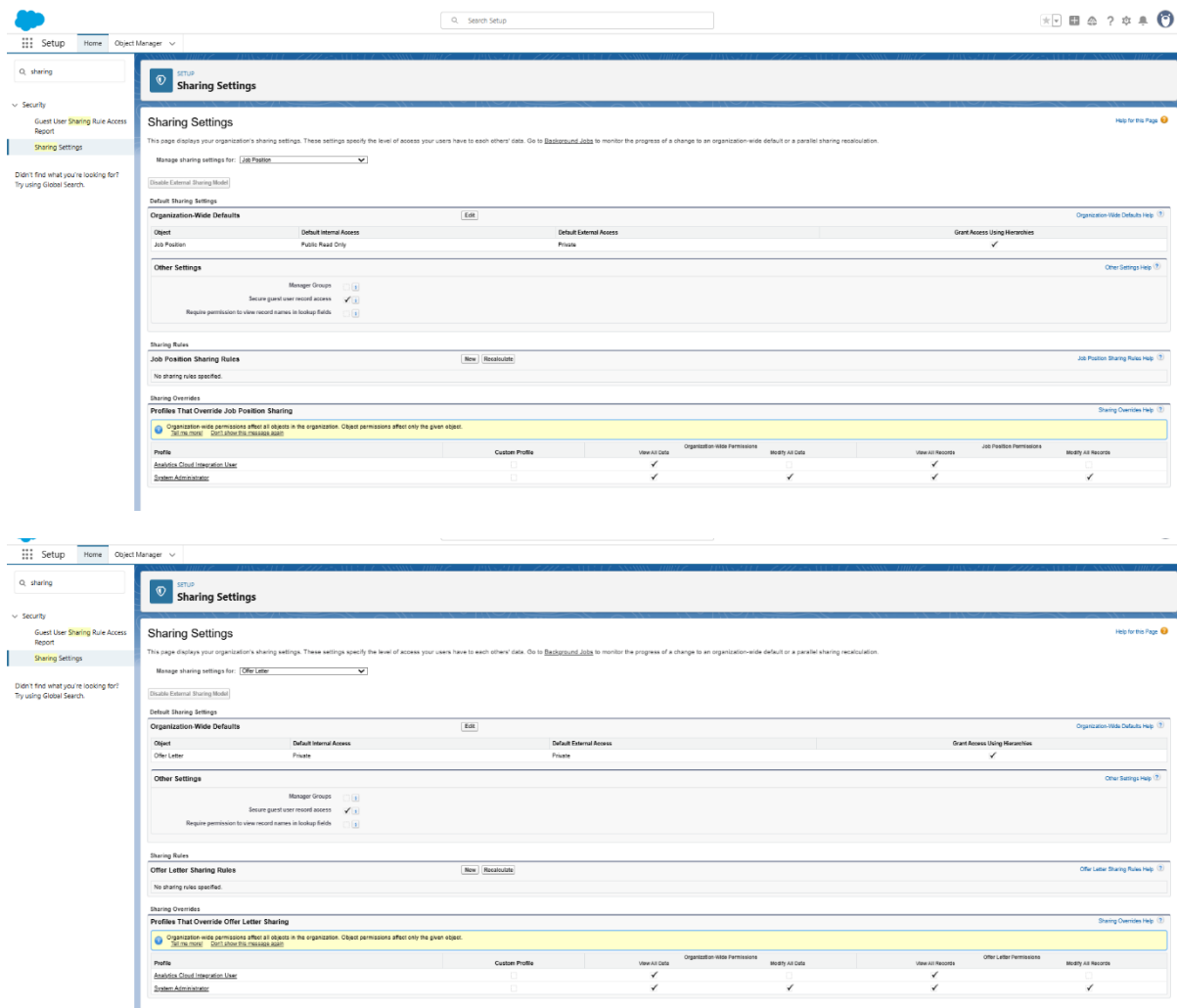
Organization-Wide Defaults: A table showing the default internal and external access levels for the 'Interview' object. The 'Default Internal Access' is 'Private' and the 'Default External Access' is 'Private'. The 'Grant Access Using Hierarchies' checkbox is checked.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Interview	Private	Private	<input checked="" type="checkbox"/>

Other Settings: A section with checkboxes for 'Manager Groups' (unchecked), 'Secure guest user record access' (checked), and 'Require permission to view record names in lookup fields' (unchecked).

Sharing Rules: A section titled 'Interview Sharing Rules' with a 'New' button and a 'Recalculate' button. It shows a table with columns for 'Action', 'Criteria', 'Shared With', and 'Access Level'. No sharing rules are specified.

Sharing Overrides: A section titled 'Profiles That Override Interview Sharing' with a 'New' button and a 'Recalculate' button. It shows a table with columns for 'Profile', 'Custom Profile', 'View All Data', 'Organization-Wide Permissions', 'Modify All Data', 'View All Records', 'Interview Permissions', and 'Modify All Records'. Two profiles are listed: 'Analytics Cloud Integration User' and 'System Administrator'. Both have 'Custom Profile' checked and 'View All Data' checked.

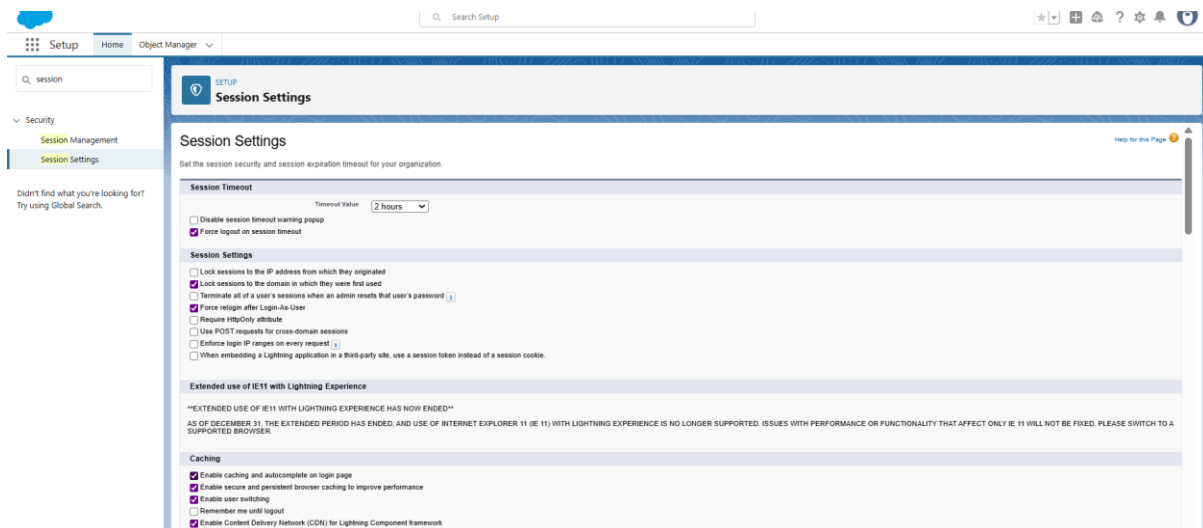


5. Field Level Security (FLS)

- Configuration
 - Verify sensitive fields (salary, notes) are hidden from non-HR roles and read-only where required.
- Procedure
 - Object Manager → Fields & Relationships → Set Field-Level Security per profile/permission set; validate via “View Field Accessibility.”

6.Session Settings

- Configuration
 - Enforce session timeout and login security measures per policy.
- Procedure
 - Setup → Session Settings → Set timeout, lock sessions to IP, HTTPS settings as needed; save.
- Screenshot
 - Session Settings page



7.Login IP Ranges

- Configuration : not configure

8.Audit Trail

- Configuration
 - Ensure Setup Audit Trail is enabled and accessible for change review.

- Procedure
 - Setup → View Setup Audit Trail → Export recent changes for governance documentation.
- Screenshot
 - Setup Audit Trail listing showing recent configuration entries.

SetupAuditTrail1758815104853 - Excel

File Home Insert Draw Page Layout Formulas Data Review View Help Acrobat Tell me what you want to do

PivotTable Recommended Table Pictures Shapes Icons 3D SmartArt Screenshot Recommended Charts Maps PivotChart Line Column Win/ Slicer Timeline Link Text Header WordArt Signature

POSSIBLE DATA LOSS Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format. Don't show again Save As...

	A	B	C	D	E	F	G	H	I
1	User	Source Namespace Prefix	Action	Section	Delegate User				
2	9/25/2025, 5:21:26 AM PDT	poonamrajak1075273@agentforce.com		Changed tabs of custom app Recruitment and Onboarding	Custom Apps				
3	9/24/2025, 11:08:43 AM PDT	ananya.sharma+hr@gmail.com		Logged out using Login-As access for Ananya Sharma	Manage Users	poonamrajak1075273@agentforce.com			
4	9/24/2025, 11:06:00 AM PDT	ananya.sharma+hr@gmail.com		Logged in using Login-As access for Ananya Sharma	Manage Users	poonamrajak1075273@agentforce.com			
5	9/24/2025, 11:03:46 AM PDT	rahul.verma+recruiter@gmail.com		Logged out using Login-As access for Rahul Verma	Manage Users	poonamrajak1075273@agentforce.com			
6	9/24/2025, 11:01:05 AM PDT	rahul.verma+recruiter@gmail.com		Logged in using Login-As access for Rahul Verma	Manage Users	poonamrajak1075273@agentforce.com			
7	9/24/2025, 10:57:30 AM PDT	ananya.sharma+hr@gmail.com		Logged out using Login-As access for Ananya Sharma	Manage Users	poonamrajak1075273@agentforce.com			
8	9/24/2025, 10:52:04 AM PDT	ananya.sharma+hr@gmail.com		Logged in using Login-As access for Ananya Sharma	Manage Users	poonamrajak1075273@agentforce.com			
9	9/24/2025, 10:50:25 AM PDT	neha.singh+interviewer@gmail.com		Logged out using Login-As access for Neha Singh	Manage Users	poonamrajak1075273@agentforce.com			
10	9/24/2025, 10:49:51 AM PDT	neha.singh+interviewer@gmail.com		Logged in using Login-As access for Neha Singh	Manage Users	poonamrajak1075273@agentforce.com			
11	9/24/2025, 10:49:01 AM PDT	ananya.sharma+hr@gmail.com		Logged out using Login-As access for Ananya Sharma	Manage Users	poonamrajak1075273@agentforce.com			
12	9/24/2025, 10:47:52 AM PDT	ananya.sharma+hr@gmail.com		Logged in using Login-As access for Ananya Sharma	Manage Users	poonamrajak1075273@agentforce.com			
13	9/24/2025, 9:28:58 AM PDT	ananya.sharma+hr@gmail.com		Logged out using Login-As access for Ananya Sharma	Manage Users	poonamrajak1075273@agentforce.com			
14	9/24/2025, 9:25:57 AM PDT	ananya.sharma+hr@gmail.com		Logged in using Login-As access for Ananya Sharma	Manage Users	poonamrajak1075273@agentforce.com			
15	9/24/2025, 9:23:45 AM PDT	poonamrajak1075273@agentforce.com		Changed tabs of custom app Recruitment and Onboarding	Custom Apps	poonamrajak1075273@agentforce.com			
16	9/23/2025, 11:03:01 AM PDT	salesforce.com, inc.		Max number of streaming topics					
17	9/23/2025, 10:05:22 AM PDT	poonamrajak1075273@agentforce.com		Requested an export	Data Export				
18	9/23/2025, 9:59:11 AM PDT	poonamrajak1075273@agentforce.com		For the 01gl000002FVbp duplicate rule Candidate_Email_Dupe, changed "Active" fro	Duplicate Rule				
19	9/23/2025, 9:59:04 AM PDT	poonamrajak1075273@agentforce.com		For duplicate rule Candidate_Email_Dupe, changed matching rules.	Duplicate Rule				
20	9/23/2025, 9:59:04 AM PDT	poonamrajak1075273@agentforce.com		Created new 01gl000002FVbp duplicate rule "Candidate_Email_Dupe". Set "Record-I	Duplicate Rule				
21	9/23/2025, 9:54:02 AM PDT	poonamrajak1075273@agentforce.com		Candidate matching rule, Candidate_Email_Exact, activating by Poonam Rajak	Matching Rule				
22	9/23/2025, 9:53:45 AM PDT	poonamrajak1075273@agentforce.com		For matching rule Candidate_Email_Exact, added matching criteria where matching n	Matching Rule				
23	9/23/2025, 9:53:45 AM PDT	poonamrajak1075273@agentforce.com		For matching rule Candidate_Email_Exact, matching engine set to Exact Match Engine	Matching Rule				
24	9/23/2025, 9:53:45 AM PDT	poonamrajak1075273@agentforce.com		Created new Candidate matching rule Candidate_Email_Exact	Matching Rule				
25	9/23/2025, 8:55:41 AM PDT	poonamrajak1075273@agentforce.com		Remote Proxy insert Offer_API_RSS: https://mock.example	Security Controls				
26	9/23/2025, 8:37:44 AM PDT	poonamrajak1075273@agentforce.com		Created a new parameter: ExternalCredential (Parameter Type: Authentication, Exte	Named Credentials				
27	9/23/2025, 8:37:44 AM PDT	poonamrajak1075273@agentforce.com		Created a new parameter: URI (Parameter Type: Url, Parameter Value: https://mock.e	Named Credentials				
28	9/23/2025, 8:37:44 AM PDT	poonamrajak1075273@agentforce.com		Created a new named credential: Offer_API	Named Credentials				
29	9/23/2025, 8:34:48 AM PDT	poonamrajak1075273@agentforce.com		Created a new external credential: Offer_API_Key	External Credentials				
30	9/23/2025, 8:22:13 AM PDT	poonamrajak1075273@agentforce.com		Changed OfferService Apex Class code	Apex Class				
31	9/23/2025, 8:22:13 AM PDT	poonamrajak1075273@agentforce.com		Created OfferHttpMock Apex Class code	Apex Class				
32	9/23/2025, 8:22:13 AM PDT	poonamrajak1075273@agentforce.com		Created OfferHttpErrorMock Apex Class code	Apex Class				
33	9/23/2025, 8:22:13 AM PDT	poonamrajak1075273@agentforce.com		Created OfferCalloutClient Apex Class code	Apex Class				
34	9/23/2025, 8:22:13 AM PDT	poonamrajak1075273@agentforce.com		Changed InterviewService Apex Class code	Apex Class				

SetupAuditTrail1758815104853