A Project Report on

**“ Salesforce Admin Project ”**

“ Recruitment App”

*Submitted By*

ROHIT KUMAR

Under the Guidance of

“ Sanjay Gupta Tech School”

Recruitment App Object Relationship

Position Job Candidate

Object Application Object Object

Job Posting Review Candidate

Object Object Skill Object

Employment Skill Object

Website Object

**Project Overview**

Summary: The Recruitment Management App is a cloud-application hosted in Salesforce and designed to streamline the recruitment process for organizations using declarative and custom development. The application will enable organizations to manage Positions, Candidate, Profile, Candidate Skill Set, Job Applications, Candidate Reviews and manage details of Job Postings on various Employment Websites. The goal of this project is to improve the efficiency of the recruitment process, reduce manual workloads, and improve the overall recruitment experience.

Problem Statement: The recruitment process can be time-consuming and labor-intensive. HR professionals often spend a lot of time in managing Positions Details & Job Postings on different Employment Websites, Tracking Candidate Details, Scheduling Interviews, Aligning Candidates with right skills for a Position for Interviews and maintaining the feedback/reviews. The current process is often fragmented and can result in missed opportunities to attract and retain top talent. There is a need for a centralized tool that can help HR professionals managements manage the recruitment process more efficiently.

1. App Name: Recruitment
2. Object: Position [ Name field data type: Text]
3. Tab: Position and add to Recruitment App

|  |
| --- |
|  |

1. Fields on Position Object:

|  |  |
| --- | --- |
| Label | Data Type |
| Job Description | Text Area (Long) |
| Responsibilities | Text Area (Long) |
| Skills Required | Text Area (Long) |
| Educational Requirements | Text Area (Long) |
| Min Pay | Currency(7,2) |
| Max Pay | Currency(7,2) |
| Travel Required | Checkbox |
| JAVA | Checkbox |
| Javascript | Checkbox |
| C# | Checkbox |
| Apex | Checkbox |
| Excel | Checkbox |
| Powerpoint | Checkbox |
| Word | Checkbox |
| Team Building | Checkbox |
| Open Date | Date |
| Hire By | Date |
| Close Date | Date |
| Working Days   * Monday * Tuesday * Wednesday * Thursday * Friday * Saturday * Sunday | Picklist(Multi-select) |
| Location   * San Francisco, CA * Austin, TX * Boulder, England * New York, NY * Mumbai, India * Sydney, Australia * Tokyo, Japan | Picklist(use first value as default) |
| Status   * New Position * Pending Approval * Open-Approved * Closed-Filled * Closed-Not Approved * Closed-Canceled | Picklist |
| Type   * Full Time * Part Time * Internship * Contractor | Picklist |
| Functional Area   * Finance * Human Resources * Information Technology * Warehousing * Miscellaneous | Picklist(sort alphabetically) |
| Job Level   * FN-100 * FN-200 * FN-300 * FN-400 * HR-100 * HR-200 * HR-300 * HR-400 * IT-100 * IT-200 * IT-300 * IT-400 * RO-100 * RO-200 * RO-300 * RO-400 * WH-100 * WH-200 * WH-300 * WH-400 * MC-100 * MC-200 * MC300 * MC-400 | Picklist(sort alphabetically) |

1. Create Dependent Picklist on Position Object

Controlling picklist: Function Area

Dependent picklist: Job Lebel

6)Create a Formula Field on Position Object as:

a) **Days Open (Number):** If close date

is blank then (today – open date)

(close date – open date).

b) **Severity(Text)**: Display a text value of

“RED”,”YELLOW” or “ GREEN”. If Day Open

Is > 20 then RED, if Day Open > 10 then

Yellow otherwise Green.

7)Validation Rule on Position Object

a)Min Pay should never be greater than Max pay.

b)If the **close data** is no specified and status is ‘closed - filed’ or ‘Closed - Not Approved’ or ‘Closed - Canceled’ then an error should be thrown as “Close data is not specified”.

1. **Create two Record Types: Technical Position, Non Technical Position**

**Create two Page Layouts for Position Object: Technical Position Layout and Non Technical Position Layout and assign to above record types.**

**Arrange both Page layouts as follows:**

**Section 1: Information**

Fields to be there:

Position Title, Owner, Status, Location, Type, Open Date,Functional,Area , Hire by , Close Date, Travel Required.

**Section 1: Compensation**

Fields to be there:

Min Pay, Max Pay, Working Days [On Technical Monday to Friday] [On Non Technical Monday to Saturday]

**Section 3: Description**

Fields to be there:

Job Description, Responsibilities, Skill Required, Educational Requirements, Certifications

**Section 4: Equirement Skills**

Fields to be there:

Java, C#, JavaScript, Apex[On Technical Position Layout] Excel, PowerPoint,Word,Team Building[On Non Technical Position Layout]

1. **Create a Compact Layout and assign.**

Put these fields:Position Name/Number, Status, Hire By, Job Level.

1. **Create Lookup Relationship field as ‘Hiring Manager’ on Position Object. It will look up(related to) the User Object (Standard Object). Put this field in the Information section on both position layouts.**
2. **Create New Object and Tab and place on Recruitment app Object Label: Candidate**

Record Name: Candidate Number

Data Type: Auto Number

Display Format: C-{0000}

Starting Value: 1

1. **Add Fields to Candidate Object**

|  |  |
| --- | --- |
| Label | Data Type |
| First Name | Text(50) |
| Last Name | Text(50) |
| Phone | Phone |
| Email | Email |
| Street | Text(50) |
| City | Text(50) |
| State | Text(50) |
| Postal Code | Text(50) |
| Country | Text(50) |
| Current Employer | Text(50) |
| Years of Experience | Number(20) |
| SSN | Text(9) |
| Education | Picklist |
| Current Employed | Checkbox |
| US Citizen | Checkbox |
| Visa Required | Checkbox |
| Mobile | Phone |
| Fax | Phone |

1. **Manage Page Layout of Candidate Object**

**Section 1: Information**

Fields to be there:

Candidate Number,Owner, First Name, Last Name, Phone,Mobile,Fax, SSN,Email

**Section 2: Address**

Fields to be there:

Street,State, City, Postal code, Country

**Section 3: Employment**

Fields to be there:

Current employed, Years of experience, Current employer

**Section 4: Additional Details**

Fields to be there:

US Citizen, Education, visa required

1. **Create New Object and Tab and place on Recruitment app**

Object Name: Job Application

Name Field label: Job Application Number

Date Type: Auto Number

Display Format: JA-{0000}

Starting Value:1

|  |
| --- |
|  |

1. **Add Fields to Job Application Object**

|  |  |
| --- | --- |
| **Label** | **Data Type** |
| Field Label: Candidate  Related List Label: Job Application | Lookup(related)to Candidate |
| Field Label:Position  Related List Label:Job Application | Lookup(related)to Position |
| Cover Letter | Long Area(Area) |
| Candidate Name | Formula(Text) |
| Starus  New,Hired,Rejection,  Review resume,phone | Picklist |

1. **Create New Object And Tab and place on Recruitment App [Review object has to one relationship with Job Application]**

Object Name: Review

Name Field label: Review Number

Data Type: Auto Number

Display Format: R{0000}

Starting Value:1

1. **Add Fields to the Review Object**

|  |  |
| --- | --- |
| **Label** | **Data Type** |
| Field\_Label :Job\_Application | Master-Detail-Relationship Master(Parent):Job Application Detail(child):Review |
| Position(Populate\_Position Name Using Formula) | Formula(Text) |
| Candidate Link | Formula(Text) |
| Candidate | Formula(Text) |
| Position Link | Formula(Text) |
| Assignment | Text Area(Long) |
| Rating- Enter a 1-5 rating of the candidate. | Number(Always required) |

1. **Validation Rule on Review Object:**

Rating must be between 1 to 5

1. **Create a Rollup Summary on the Job Application object.**
2. Label: Total Rating, Field to aggregate: Rating
3. Label: Number of Reviews
4. Label:Highest Rating, Field to aggregate:Rating
5. Label:Lower Rating, Field to aggregate:Rating
6. Label:Number of Best Review[Filter Review records where Rating is >=4]

1. **Create a Formula field on Job Application Object.**

Label: Average Rating(Number)

1. **On Job Application object page layout drag Review Related List and put following field on related list:**  Review Number,Rating,Candidate,Position,Created Date.
2. **Create new Object and Tab, also place on Recruitment App:**

Object Name: Employment Website Name

Name Field Label : Employment Website Name

Date Type: Text

1. **Add following Fields to Employment Website Object:**

|  |  |
| --- | --- |
| Label | Data Type |
| Web Address | URL[required] |
| Price per Post | Currency(5,2)[required] |
| Maximum Budget | Currency(5,2)[required] |

1. **Create new Object and Tab, also place on Recruitment App:**

Object Name: Job Posting

Name Field Label: Job Posting Number

Data Type: Auto Number

Display format: JP-{0000}

Starting Value:1

1. **Add following Fields to Job Posting Object:**

|  |  |
| --- | --- |
| **Label** | **Data Type** |
| Field Label: Position  Related List Label: Employment Website | Master-Detail Relation  Master: Position  Detail: Job Posting |
| Field Label:Employment Website  Related List Label:Position | Master-Detail Relation  Master: Employment Website  Detail: Job Posting |

1. **On Position object in the page layout go to Employment Website Related list and add following fields:**

Employment Website: Employment Website Name

Employment Website:Web Address

Job Posting: Job Posting Number

1. **On Employment Website object in the page layout go to Position Related list and add following fields:**

Position:Position Name

Job Position: Job Position Number

Position: function Area

Position: Location

Position: Open Date

**28.Create a Duplicate Rule on Candidate Object.Matching Rule will work based on duplicate Email or Phone.Block dublicate record creation and updation**.

**29.Create a Home Page and Place it on the Recruitment App.Add following components on Home Page and Activate it only for Recruitment App.**

1.Assistant

2.Key Deals

3.Today’s Event

4.Today’s Task

5.Chatter Feed

**30.Use Related List Single on Job Application Record Page to show all related job Application to Position and Candidate. Use Position and Candidate those are populated on the Job Application Record.**

**31.Enable Feed Tracking for Candidate and Position Objects(for some selected fields) used in Recruitment App.**

**32.Set Field History Tracking for all objects(some selected fields) used in Recruitment App. Also place a History related list on Page Layout.**

**33 Create following List Views,select suitable field to display and apply filters.**

**On Position Object**

1. Open Positions
2. Closed Positions
3. Technical Positions
4. Non Technical Position

**On Candidate Object**

1. Employed Candidate
2. Non Employed Candidate

**34.Create a Global Action to create Position and Candidate Records.**

**35.Create an Object Specific Action on Job Application to create a Review Record.**

**36.Create a Tabular Record for Candidates. Report should display only those candidate details where email is not null.Also add some fields as per choice in the report.**

**37.Summarize date of Position based on position status. Show data for open positions only.Also Create a bar chart.**

**38.Summarize Review records grouped by Candidate so that ratings can be grouped.Create a donut chart on this report.**

**40. Create a Matrix Report on Position. Group rows on Status and columns on Type.**

**41.Create a Report on job Application having related review records.Summaries it based on Status.**

**42.Create a Report on Duplicate Candidates. Please verify you have duplicate rules and matching rules created on Candidate Object.**

**43.Apply Bucketing of fields on Position. Create a bucket for open position and another for closed position. Create positions. Use the bucket field to summarized the report.**

**44.Place Summary & Matrix Reports on the Homepage of the Recruitment app. Also place Position-Matrix Report on Position Position record Page.**

**45.Place the above report on a Dashboard and add the dashboard on the home page of the Recruitment app.**

**46.Export Data through any of the reportd created above.**

**47.Share Report and Dashboard with other Users. Also verify access by logging in as the user whom you shared the Report and Dashboard with.**

**48.Create following Profiles and Permission Sales:**

**Profile: Recruiter[Create by cloning Standard User Profile]**

|  |  |
| --- | --- |
| **Object** | **Permission** |
| Position | Create, Read, Edit |
| Candidate | Create, Read, Edit |
| Job Application | Create, Read, Edit |
| Review | Create, Read, Edit |
| Job Posting | Create, Read, Edit,Delete,View & Modify All |
| Employment Website | Create, Read, Edit,Delete,View & Modify All |

**Profile:Standard Employee[Create by cloning Standard User Profile]**

|  |  |
| --- | --- |
| **Object** | **Permission** |
| Position | Read[read/edit FLS,to all fields except min pay,max pay] |
| Candidate | **-** |
| Job Application | **-** |
| Review | **-** |
| Job Posting | **-** |
| Employment | **-** |

**Permission Set: Hiring Manager**

|  |  |
| --- | --- |
| **Object** | **Permission** |
| Position | Create, Read, Edit |
| Candidate | Read[Read/edit FLS to all fields except SSN No] |
| Job Application | Read, Edit[Read/edit FLS to all fields, Read only FLS to lookup fields] |
| Review | Create, Read, Edit |
| Job Position | Create, Read, Edit |
| Employment Website | Read |

**Permission Set: Interviewer**

|  |  |
| --- | --- |
| **Object** | **Permission** |
| Position | Read[Read/edit FLS to all fields except Min or Max Pay] |
| Candidate | Read[Read/edit FLS to all fields except SSN No] |
| Job Application | Read |
| Review | Create, Read, Edit |
| Job Position | **-** |
| Employment Website | **-** |

**Note:** Permission Set will be assigned to Standard Employees when they will be paying the role of Hiring Manager or Interviewer.

**Different Use Cases for Testing Profile and Permissions:**

1. Assign Recruiter Profile
2. Assign Standard Employee Profile
3. Assign Standard Employee Profile & Hiring Manager Set.
4. Assign Standard Employee Profile and Interviewer Permission Set.

Set Organization Wide Defaults(OWD) as:

* Candidate And Job Application - Private
* Employment Website and Position - Public Read

**Note:** Login with Recruiter Profile user and verfiy whether that user can access or cannot the records created by System admin user as well as Recruiter Profile User.