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CHENNAI-600108

JOB APPLICATION TRACKING

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OBJECTIVE:

✦ JOB APPLICATION TRACKING SYSTEM (JATS) is a software we can use this through the Salesforce application.

✦ The JATS is a software application that helps you manage the entire recruitment process, right from receiving resumes to hiring employee codes.

1.INTRODUCTION

1.1 OVERVIEW:

✧ The job applicant tracking system (JATS) is software that manages the recruiting and hiring process, including job postings and job applications. It organized information about job seekers and makes it searchable.

✧ As its name implies, JATS tracks candidates through the hiring process.

✧ shortlisting candidates, applicant evaluation, scheduling interviews, managing the hiring process, background verification, and completing new-hire paperwork.

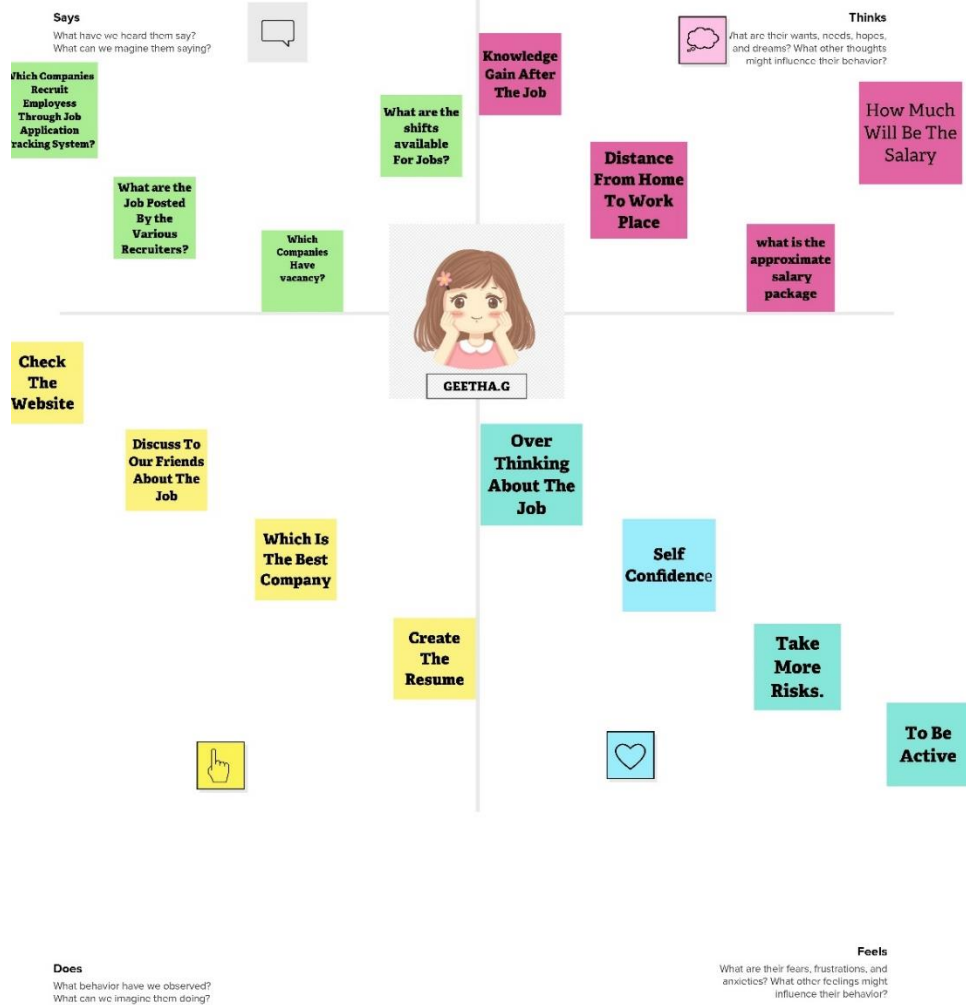
2.PROBLEM DEFINITION & DESIGN THINKING

2.1 EMPATHY MAP

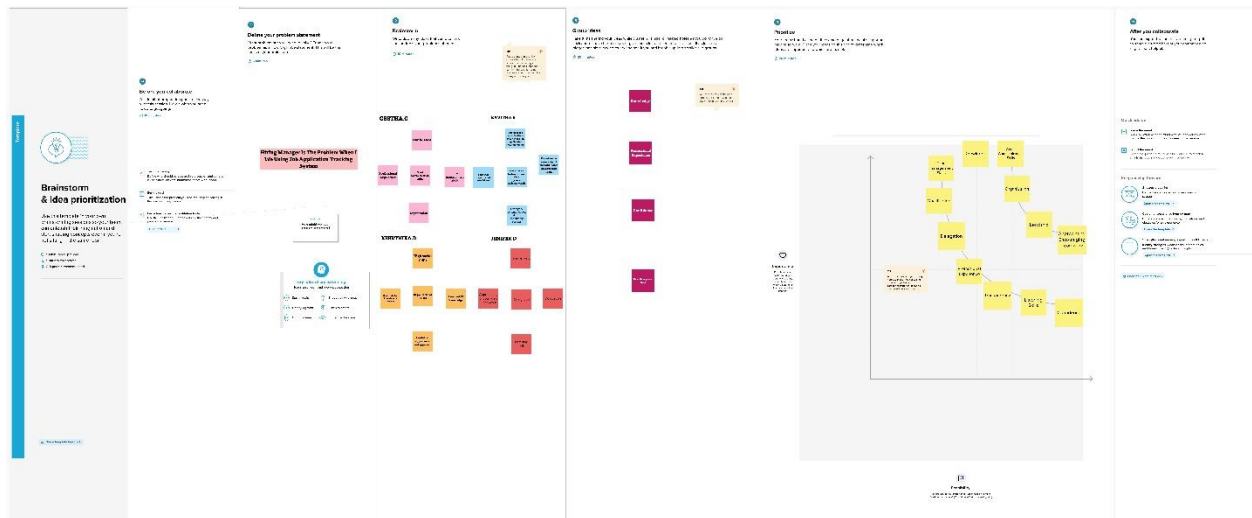


Build empathy

The information you add here should be representative of the observations and research you've done about your users.



2.2 IDEATION & BRAINSTORMING MAP



3.RESULT

3.1 DATA MODEL:

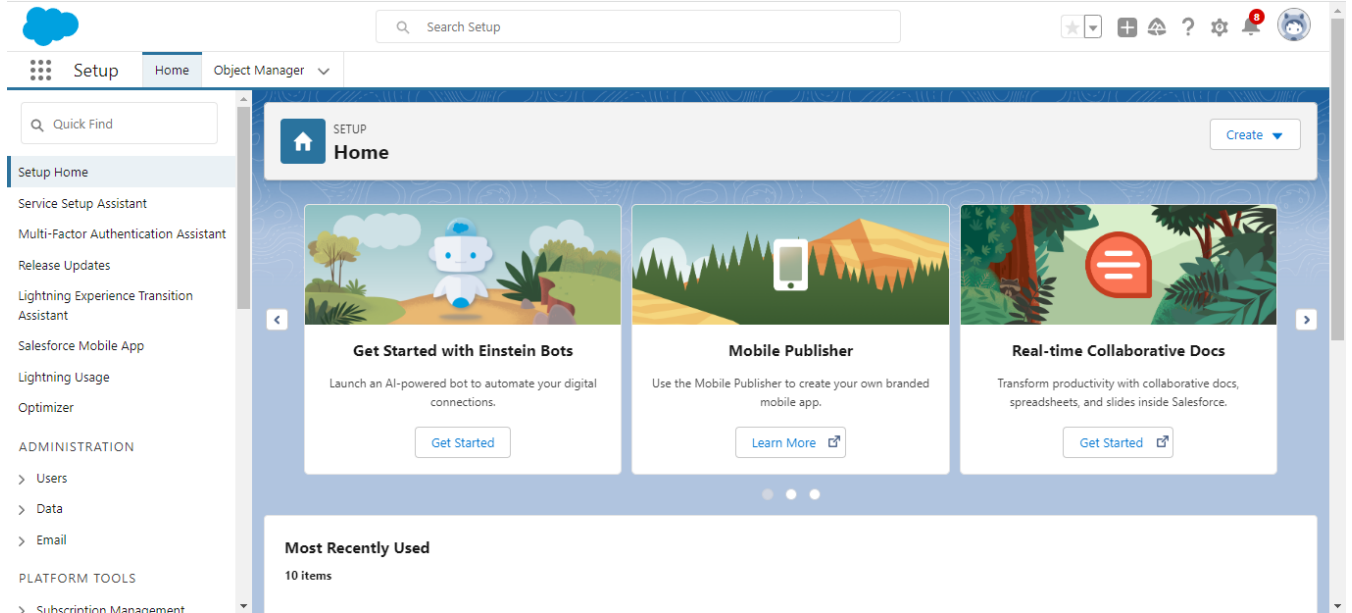
OBJECT NAME	FIELDS IN THE OBEJECT	
Object 1	Field label	Data type
	Recruiter	Auto Number
	Job	Text
Object 2	Field label	Data type
	Recruiter	Master -Detail Relationship
	Description	Text Area

3.2 ACTIVITY & SCREENSHOT WITH DESCRIPTION

MILESTONE 1- Salesforce:

Activity 1

Creating a Salesforce Developer Org:



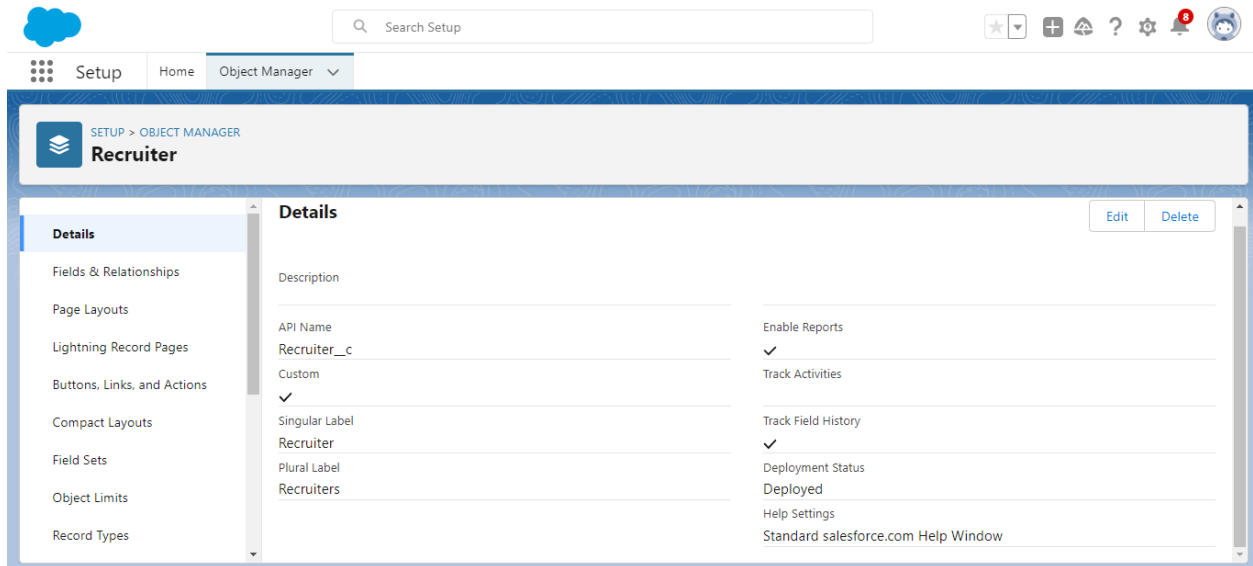
DESCRIPTION

1. Search Developer.salesforce.com
2. Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.
3. Click sign me up, after a few min you will receive a mail from salesforce org and by using the verify account link you can create your new password
4. Click save.
5. Search login.salesforce.com
6. By using username and password you can log into the salesforce org.

MILESTONE 2- Object:

Activity 1:

Create a Custom Object for Recruiter:



The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' (selected). A search bar labeled 'Search Setup' is on the right. Below the navigation bar, the page title is 'SETUP > OBJECT MANAGER' followed by 'Recruiter'. The left sidebar contains a list of options: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Details' and contains two columns of settings. The left column includes 'Description', 'API Name' (Recruiter__c), 'Custom' (checked), 'Singular Label' (Recruiter), 'Plural Label' (Recruiters), and 'Record Types'. The right column includes 'Enable Reports' (checked), 'Track Activities', 'Track Field History' (checked), 'Deployment Status' (Deployed), 'Help Settings', and a link to 'Standard salesforce.com Help Window'. 'Edit' and 'Delete' buttons are in the top right corner of the details section.

Field	Value
Description	
API Name	Recruiter__c
Custom	✓
Singular Label	Recruiter
Plural Label	Recruiters
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	
Standard salesforce.com Help Window	

Activity 2:

1. Create a Jobs, Candidate, Job Application Object and Tab.

Jobs

Cloud logo Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Job

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types

Details Edit Delete

Description	
API Name	Job__c
Custom	✓
Singular Label	Job
Plural Label	Jobs
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	
Standard salesforce.com Help Window	

Candidate

Cloud logo Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Candidate


Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types









Details Edit Delete

Description	
API Name	Candidate__c
Custom	✓
Singular Label	Candidate
Plural Label	Candidates
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	
Standard salesforce.com Help Window	

Job Application



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Job Application

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Details

Description

API Name

Job_Application__c

Custom

✓

Singular Label

Job Application

Plural Label

Job Applications

Enable Reports

✓

Track Activities

Track Field History

✓

Deployment Status


Deployed

Help Settings









Standard salesforce.com Help Window

EditDelete

Object



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Object

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Details

Description

API Name

Object__c

Custom

✓

Singular Label

Object

Plural Label

Objects

Enable Reports

✓

Track Activities

Track Field History

✓

Deployment Status

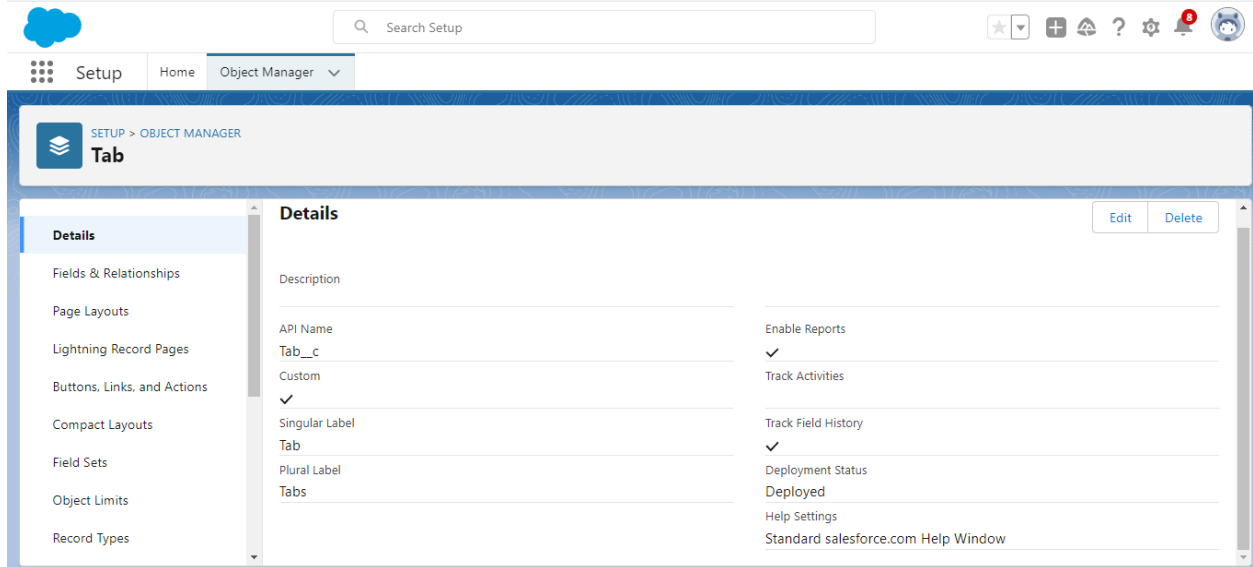
Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

Tab



DESCRIPTION:

To create a custom object, follow these steps:

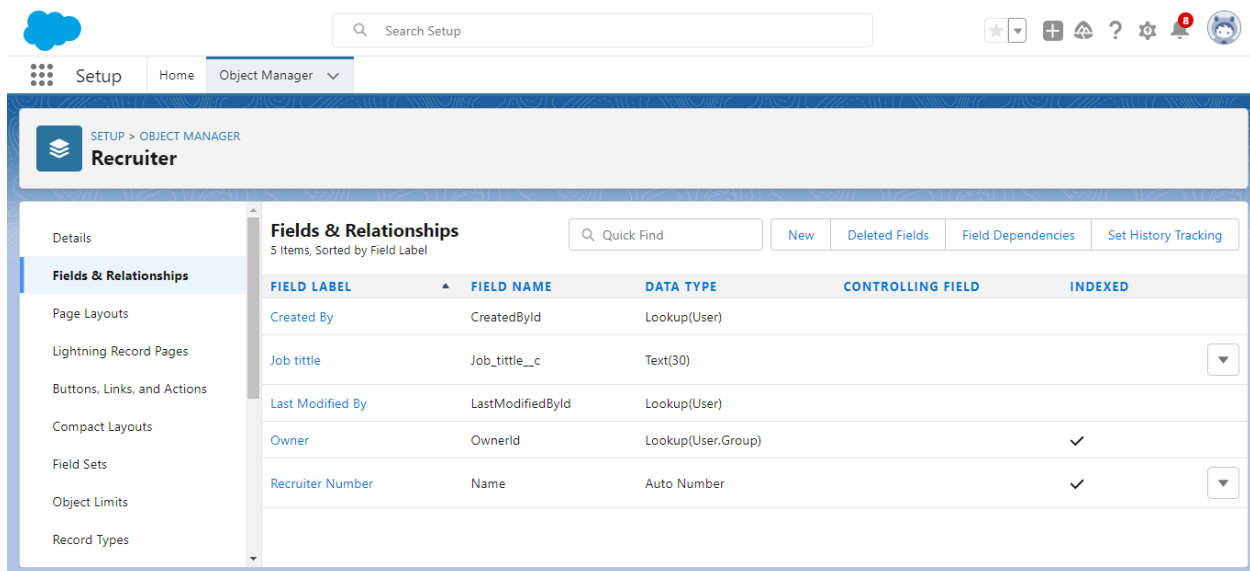
1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Recruiter ".
4. Fill in the plural label as " Recruiters"
5. Record name: " Recruiter Number"
6. Select the data type as "Auto Number".
7. Under display format enter "REC-{0000}".
8. Enter starting number as 1.
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.

12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

Milestone 3- Fields:

Activity 1:

Create the custom fields



The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar labeled "Search Setup", and various utility icons. The left sidebar shows the Setup menu with "Object Manager" selected. The main content area is titled "Fields & Relationships" for the "Recruiter" object. It displays a table of 5 items, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The items listed are: Created By (CreatedBy, Lookup(User)), Job title (Job_title__c, Text(30)), Last Modified By (LastModifiedBy, Lookup(User)), Owner (OwnerId, Lookup(User,Group)), and Recruiter Number (Name, Auto Number).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Job title	Job_title__c	Text(30)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Recruiter Number	Name	Auto Number		✓

Activity 2:

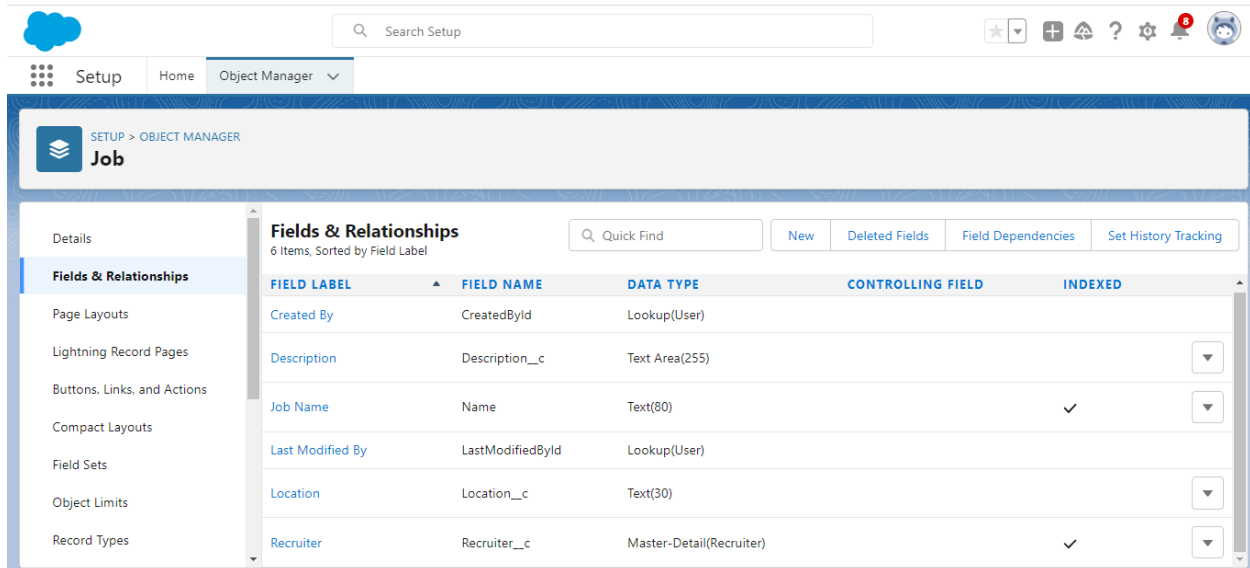
Creation of Master-detail relationship

Activity 3:

Create a new custom field:

Activity 4:

Create a new custom field:



DESCRIPTION:

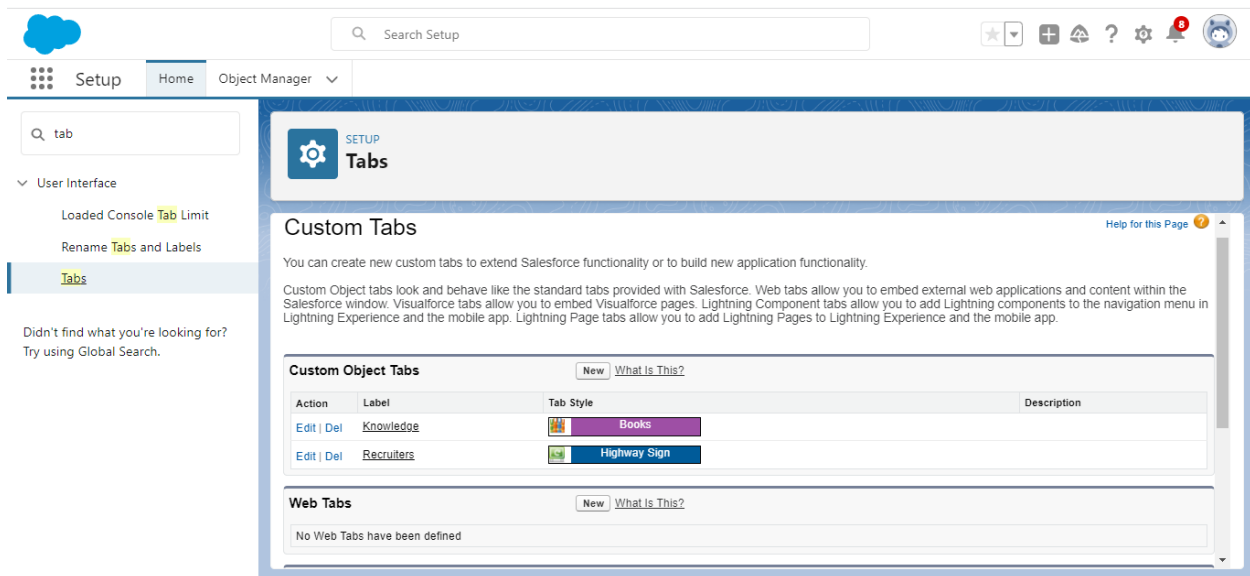
1. Click the object manager tab, Select the object for which you have to create the fields and relationships.
2. From the sidebar, click Fields & Relationships. Notice that there are already some fields there Those are the standard fields.
3. Click New to create a custom field. Tip: Before creating a new field, do a quick search to make sure a similar one doesn't already exist.
4. Click on the new to create a field.
5. Choose the data type as a Text, click next
6. Enter field label, length and Name and click next
7. Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security. Click next
8. Select the page layouts that should include this field.

9. Click save.

Milestone 4-Tab:

Activity 1:

Create a Tab



DESCRIPTION:

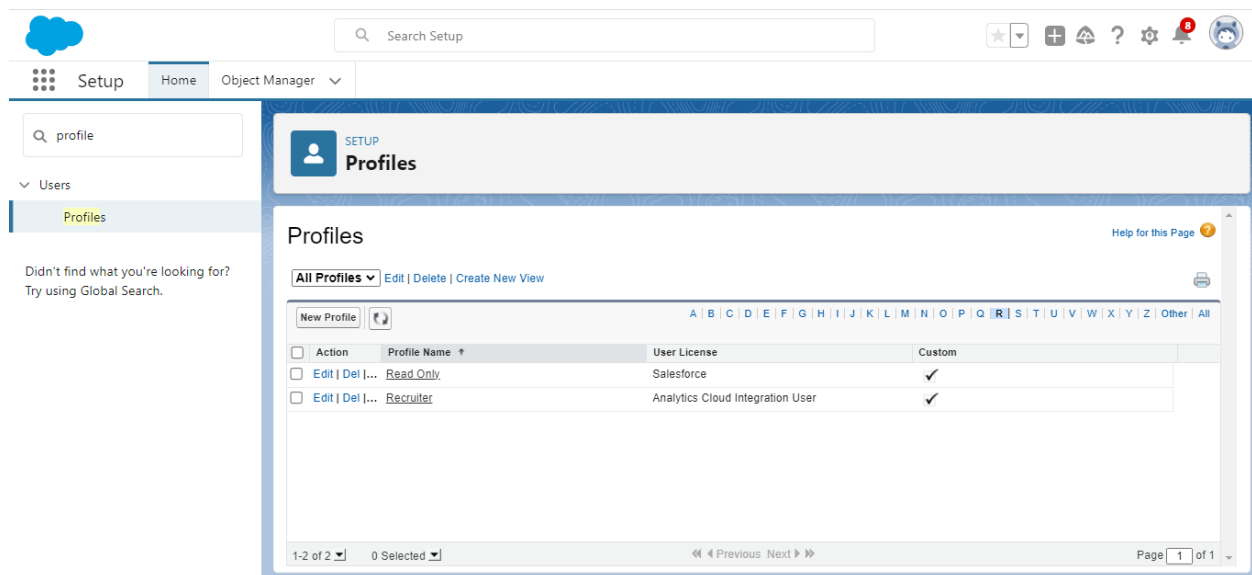
1. Click setup
2. Search tab in Quick box then, select tab
3. Click New custom object tab section
4. Select the created object Recruiter and tab style for the new custom tab.
5. Select the profiles that visible in the tab
6. Click on custom apps to make visible.

7. Click save.

Milestone 5- Profile:

Activity 1:

Create a custom profile



The screenshot shows the Salesforce Setup interface. The left sidebar contains the Setup menu with options like Home, Object Manager, and Profiles. The main content area displays the 'Profiles' page, which includes a table of existing profiles and a 'New Profile' button. The table lists two profiles: 'Read Only' and 'Recruiter', both with 'Salesforce' and 'Analytics Cloud Integration User' licenses respectively. The 'Custom' column shows checkmarks for both profiles.

Action	Profile Name	User License	Custom
Edit Del ...	Read Only	Salesforce	✓
Edit Del ...	Recruiter	Analytics Cloud Integration User	✓

Activity 2:

Create a profile with the profile name as “Sales Manager”. Follow the steps from above Activity

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profile' entered and a list of items including 'Users' and 'Profiles'. The main content area is titled 'Profiles' and shows a list of profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Sales Manager' profile is highlighted.

Action	Profile Name	User License	Custom
Edit Delete	Sales Manager	Analytics Cloud Integration User	<input checked="" type="checkbox"/>
Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Delete	Standard Profile - No Acct Delete	Salesforce Platform	<input checked="" type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	Custom Administrator	Salesforce	<input type="checkbox"/>

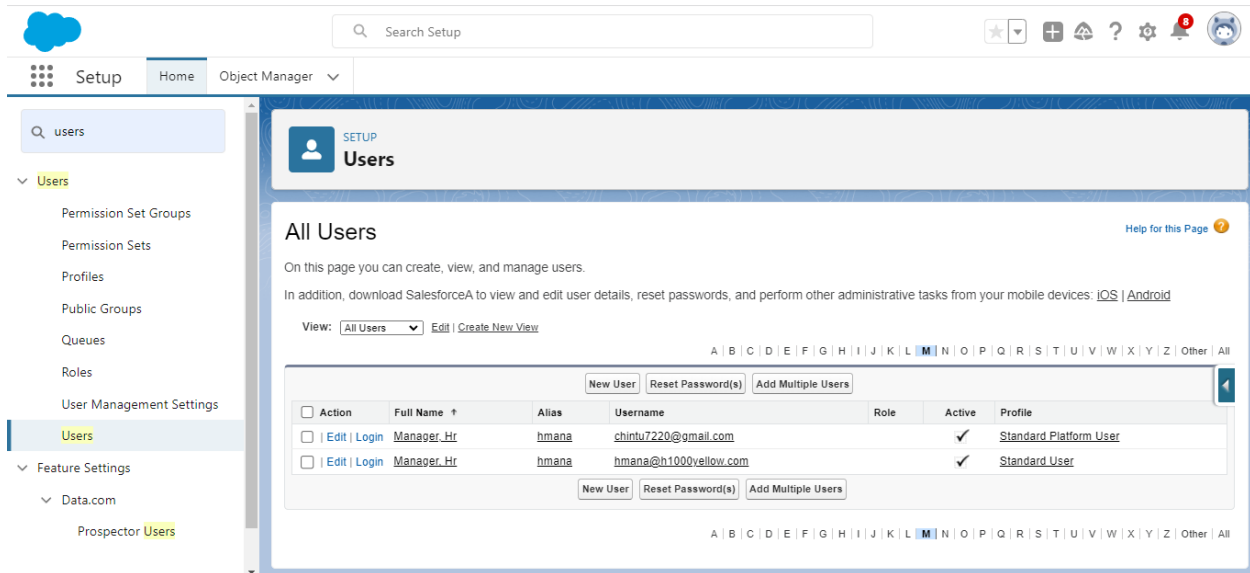
DESCRIPTION:

1. From setup , enter profiles in Quick Find box
2. Select profiles.
3. Click clone.
4. For Profile, enter Recruiter.
5. Click save.

Milestone 6-User

Activity 1:

To Create a user:

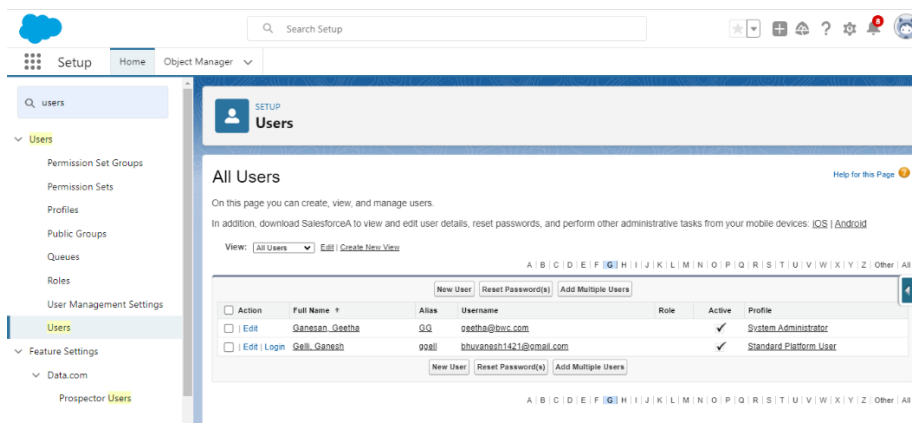


The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "users" entered. Under the "Users" section, "Users" is selected. The main content area is titled "All Users" and contains a table of existing users.

Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Manager_Hr	hmana	chintu7220@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit Login	Manager_Hr	hmana	hmana@h1000yellow.com		✓	Standard User

Activity 2:

Create a user with a username as “Ganesh Gelli”, and assign him the sales Manager profile. Follow the steps from above Activity



The screenshot shows the Salesforce Setup interface with the "All Users" table updated to include two new users.

Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Ganesh_Gantha	GG	gantha@buc.com		✓	System Administrator
<input type="checkbox"/> Edit Login	Gelli_Ganesh	ggelli	bhuvanesh1421@gmail.com		✓	Standard Platform User

DESCRIPTION:

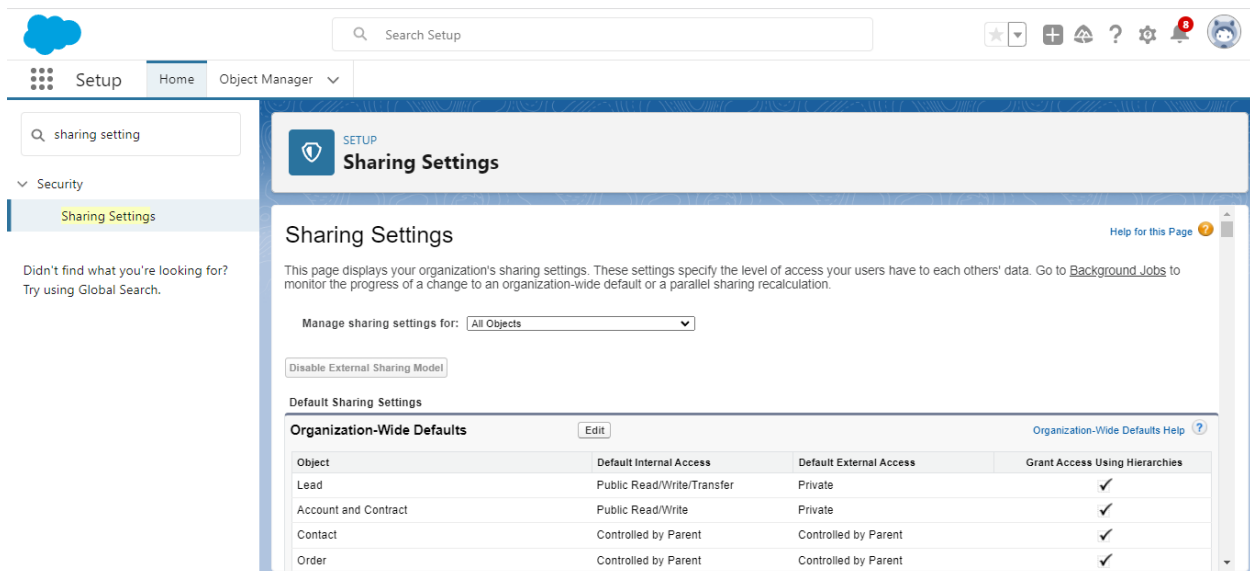
1. From Setup, enter Users in the Quick Find box, then select Users.
2. Click New User.
3. Enter First name as HR and last name as Manager

4. Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.
5. Then create a new role HR Manager.
6. Select user License as Standard Platform User.
7. Select profile.
8. Click save.

Milestone 7-Sharing Rules:

Activity 1:

Create a sharing rule



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "sharing setting" and a list of navigation items including Security and Sharing Settings. The main content area is titled "Sharing Settings" and includes a search bar, a "Manage sharing settings for:" dropdown set to "All Objects", and a "Disable External Sharing Model" button. Below this is a table for "Default Sharing Settings" with columns for Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The table lists four objects: Lead, Account and Contract, Contact, and Order, each with specific access levels and a checkmark in the hierarchy column.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓

Activity 2:

Create a Sharing Rule to Share the records of Job Application to HR Manager with the Access of Read/Write.

Search Setup

Setup Home Object Manager

Q sharing setting

Security

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

Sharing Settings

Streaming Channel	Public Read/Write	Private	
User Provisioning Request	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Candidate	Public Read/Write	Private	✓
Job	Controlled by Parent	Controlled by Parent	
Job Application	Public Read/Write	Private	✓
Nick Name	Controlled by Parent	Controlled by Parent	
Object	Public Read/Write	Private	✓
Prequalified?	Public Read/Write	Private	✓

Search Setup

Setup Home Object Manager

Q sharing setting

Security

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

Sharing Settings

Streaming Channel	Public Read/Write	Private	
User Provisioning Request	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Candidate	Public Read/Write	Private	✓
Job	Controlled by Parent	Controlled by Parent	
Job Application	Public Read/Write	Private	✓
Nick Name	Controlled by Parent	Controlled by Parent	
Object	Public Read/Write	Private	✓
Prequalified?	Public Read/Write	Private	✓

DESCRIPTION:

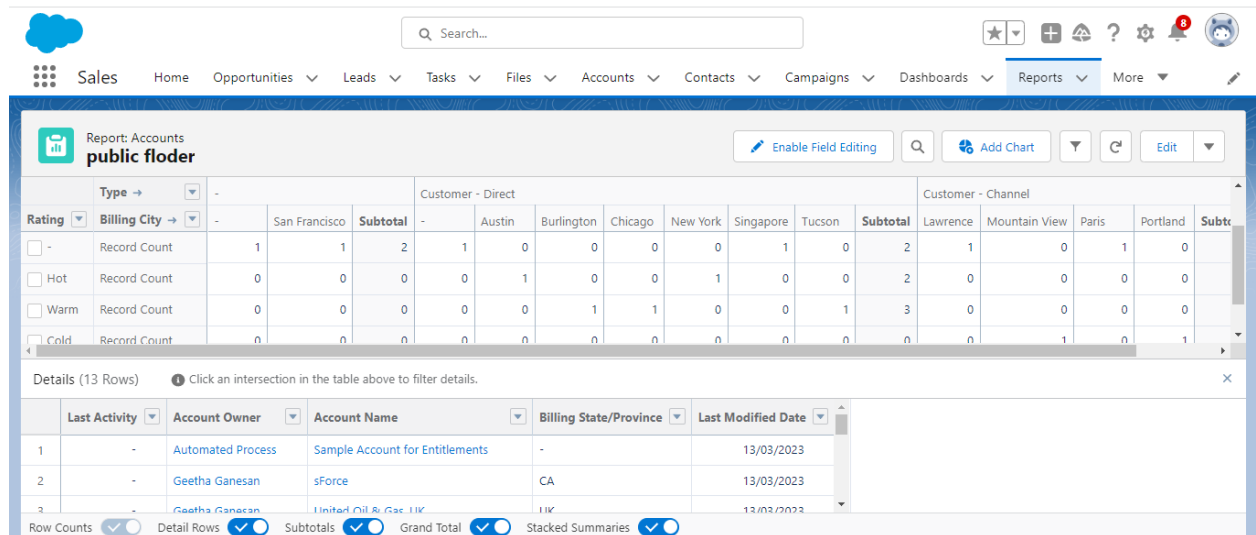
- 1) Go to Sharing Settings, which can be found under the Quick Find section
- 2) Scroll down and find the candidate object where a sharing rule needs to be added, and then click on New to create a new sharing rule
- 3) Add the label of the sharing rule you want to make.
- 4) Select your rule type based on the criteria.

- 5) Select the field can join immediately check field from the candidate object.
- 6) Select the operator as equal and value is true.
- 7) And in selecting the users to share with the section select roles and in that select Hr Manager.
- 8) And in the section of select the level of access for the users give the access Read/Write.
- 9) And save the rule.

Milestone 8-Reports:

Activity 1:

Create a report:



The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and Reports. The 'Reports' tab is active, showing a report titled 'Report: Accounts public folder'. Below the title, there are buttons for 'Enable Field Editing', 'Add Chart', and 'Edit'. The main table displays account data with columns for Rating, Billing City, and various account details. The table is filtered by 'Type' as 'Customer - Direct'. Below the main table, there's a 'Details (13 Rows)' section showing a detailed view of the accounts, including columns for Last Activity, Account Owner, Account Name, Billing State/Province, and Last Modified Date. At the bottom, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', 'Grand Total', and 'Stacked Summaries', all of which are checked.

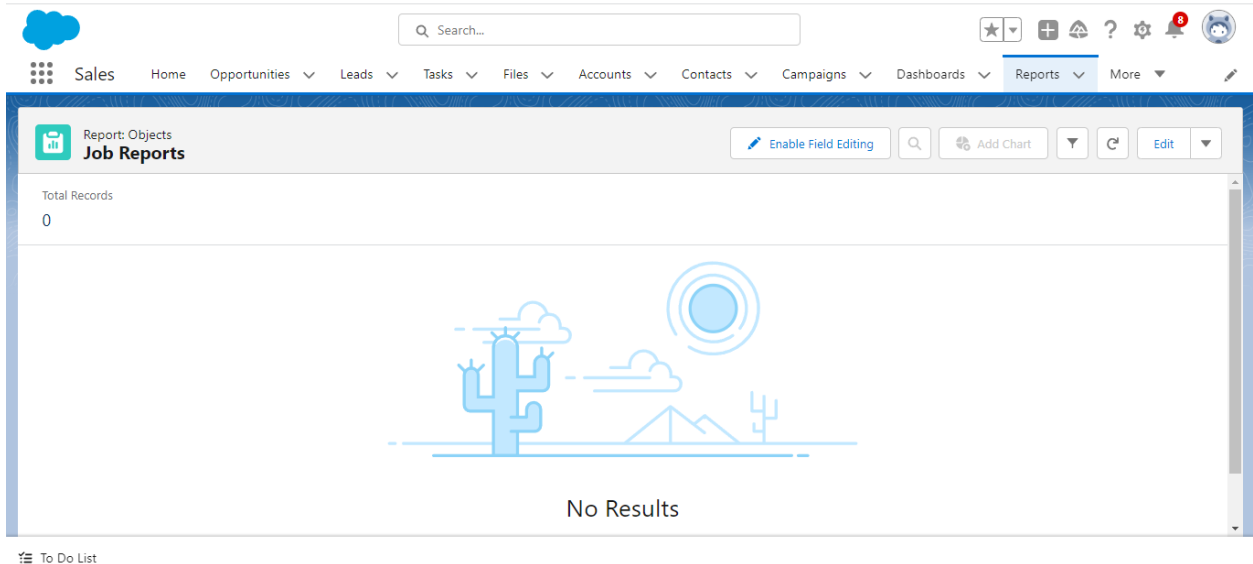
Rating	Billing City	San Francisco	Subtotal	Austin	Burlington	Chicago	New York	Singapore	Tucson	Subtotal	Lawrence	Mountain View	Paris	Portland	Subtotal
-	Record Count	1	1	2	1	0	0	0	1	0	2	1	0	1	0
Hot	Record Count	0	0	0	1	0	0	1	0	0	2	0	0	0	0
Warm	Record Count	0	0	0	0	1	1	0	0	1	3	0	0	0	0
Cold	Record Count	0	0	0	0	0	0	0	0	0	0	1	0	1	0

Last Activity	Account Owner	Account Name	Billing State/Province	Last Modified Date
-	Automated Process	Sample Account for Entitlements	-	13/03/2023
-	Geetha Ganesan	sForce	CA	13/03/2023
-	Geetha Ganesan	United Oil & Gas UK	UK	13/03/2023

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒ Stacked Summaries ☒

Activity 2:

Create a Report using the Objects Jobs, Candidate and Job Application. Follow the steps from above Activity.



DESCRIPTION:

Create a report that displays rating of the account and which has type and account name.

- 1) Click on app launcher search for reports.
- 2) Click on the new report and select the category has accounts and contacts.
- 3) And the report type has accounts.
- 4) In the details section select the option start report.
- 5) In the filter pane select All accounts to show me.
- 6) And All time is created.
- 7) In the outline pane, group rows select Rating and in group columns select Account Name.
- 8) In the columns section add Type and Billing city.

4. TRAILHEAD PROFILE PUBLIC URL

TEAM LEAD – <https://trailblazer.me/id/geetg14>

TEAM MEMBER - <https://trailblazer.me/id/djenifer123>

TEAM MEMBER - <https://trailblazer.me/id/kavis102>

TEAM MEMBER - <https://trailblazer.me/id/keerd11>

PROJECT REPORT TEMPLATE

5.ADVANTAGES & DISADVANTAGE

ADVANTAGES:

Job application tracking system advantages include enabling you to focus more on tasks that truly require your attention rather than spending manual resources on routine, mundane tasks.

Good JATS can save almost 50% of your time by automating these routine tasks. In doing so, your processes get more efficient and faster.

DISADVANTAGE:

Could filter out good candidate.

Communication can be less personalized.

Takes more time to train an external candidate.

Damage employee morale.

APPLICATIONS:

Managing the candidates: JATS is a tool for managing the candidate resume, evaluation and hiring process from start to finish.

Handles the recruitment process: JATS software handles the recruitment process just by sorting through thousands of applications, to determine, which ones are the best fit for the jobs for which they were submitted.

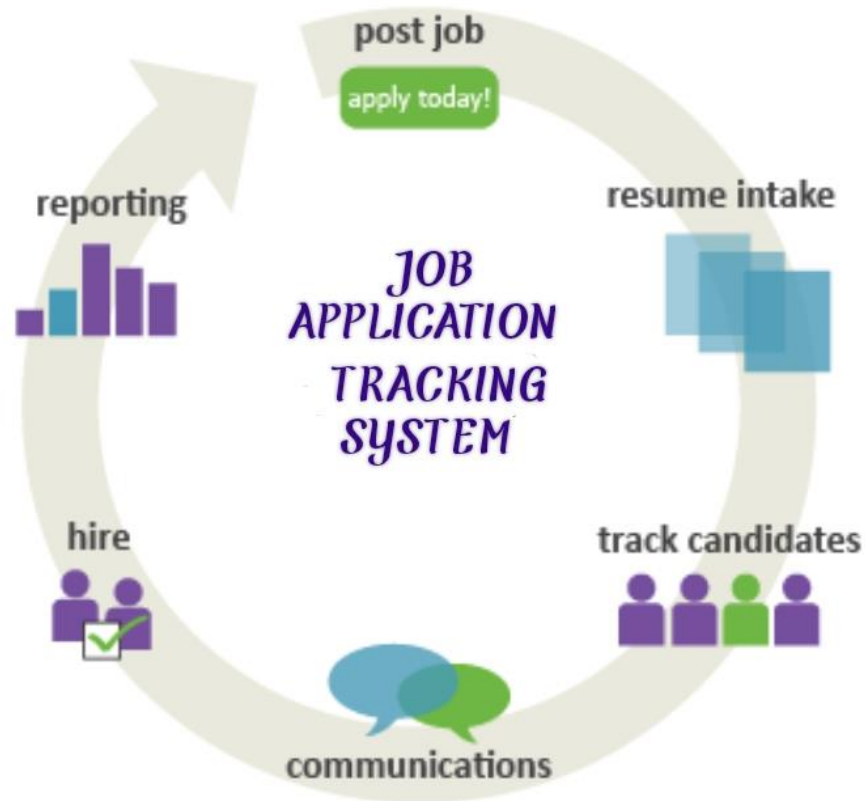
Score Candidate: Job applicant tracking software may score candidates and rank more qualified applicants based on the employer's standards.

To post job opening: Job application tracking software can be used to post job opening on a corporate website or job board and create interview requests to likely candidate through email.

7. CONCLUSION

JATS are crucial for streamlining and automating your hiring process and assisting you in becoming more productive and efficient in your daily responsibilities.

They also improve the hiring process, reduce the burden, and boost candidate experience.



8.FUTURE SCOPE

Modern Job Application Tracking System: It has become extremely easy for an HR leader to stay up to date.

JATS have become more user-friendly: With the help of JATS, HR professionals can easily create efficient workflows and keep a constant check on the hiring process without any difficulty.