

## Phase 9: Reporting, Dashboards & Security Review

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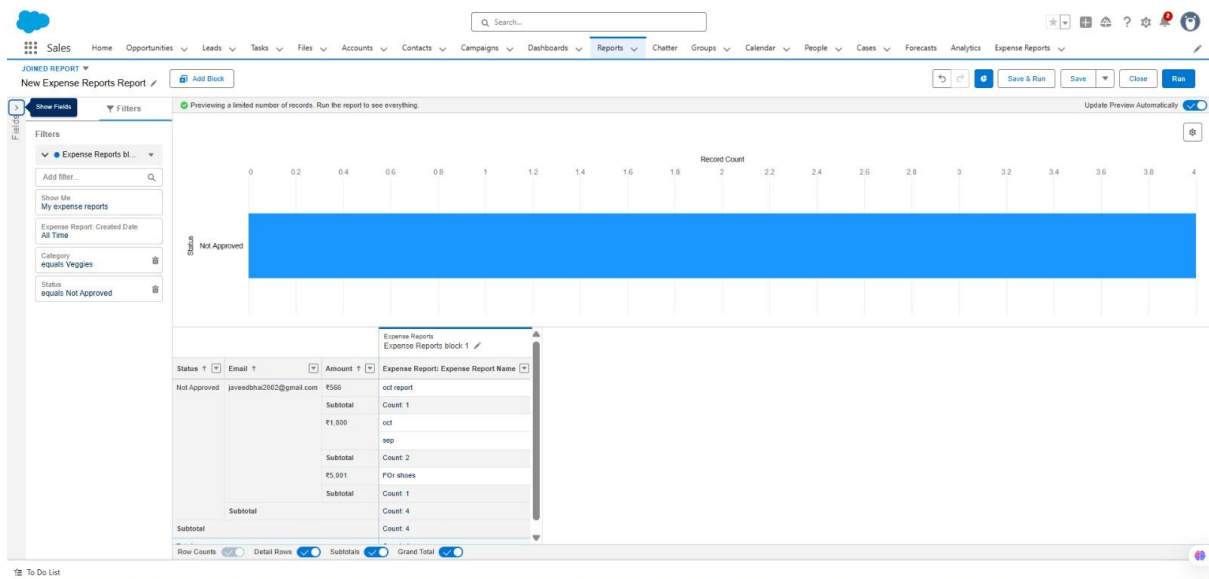
### Reports: Tabular, Summary, Matrix, Joined

- Tabular reports list expenses in a flat table, best for exporting and quick totals.
- Summary reports allow groupings (such as by category or department), providing subtotal and aggregate views.
- Matrix reports offer row and column groupings (e.g., months as columns, departments as rows for expenses).
- Joined reports combine multiple report types, useful for showing relationships like expenses versus revenue or vendor performance.

The screenshot shows a web application interface for an expense report approval system. At the top, there is a navigation bar with a search bar and several icons. Below the navigation bar, the main content area displays a welcome message: "Welcome to expense report approval system". Underneath the welcome message, there is a form for creating or editing an expense report. The form is divided into two columns. The left column contains fields for "Expense Report Name" (oct report), "Name" (javeed), "Amount" (₹450), "Status" (Approved), "Email" (javeedhai2002@gmail.com), "Category" (Veggies), and "Created By" (Javeed Ahammad Shaik, 28/09/2025, 10:28 pm). The right column contains fields for "Owner" (Javeed Ahammad Shaik) and "Last Modified By" (Javeed Ahammad Shaik, 29/09/2025, 12:55 am). Each field has a small edit icon next to it.

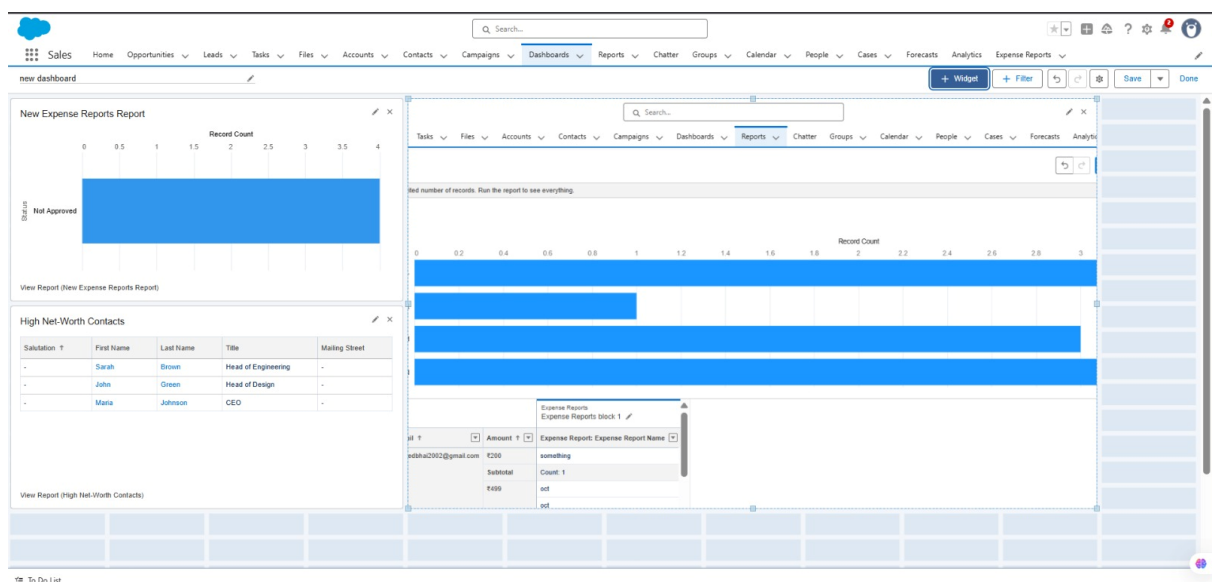
### Report Types

- Standard Expense Reports: Track transactions, separate by cost center, department, or vendor.
- Custom Report Types: Enable combining different objects (e.g., user + expense data).



## Dashboards

- Dashboards visually represent expense data with charts (bar, pie, line, etc.), using data from reports. You select the key metrics—top categories, spend by department, time-based trends.
- Example Dashboard Components:
  - Total expense breakdown by category (pie chart).
  - Monthly expense trends (line chart).
  - Department-wise spending (bar chart).



## Dynamic Dashboards

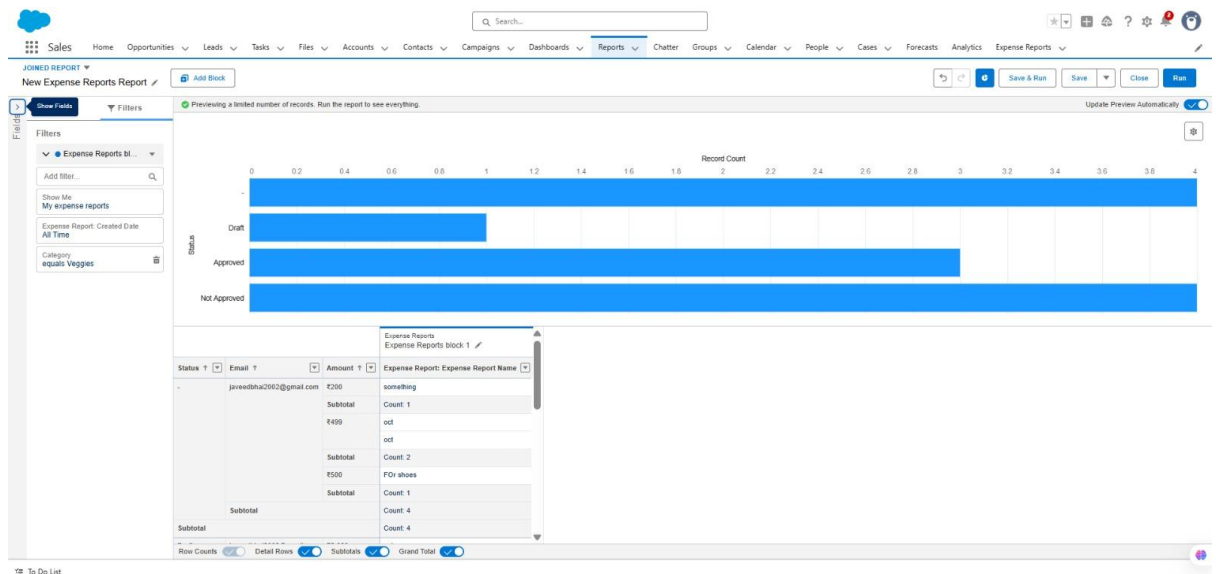
- Dynamic dashboards show data filtered for each user—e.g., managers see only their department's expenses. This helps with relevant, secure access.

## Sharing Settings

- Reports and dashboards can be shared via folders. Define who can view, edit, and subscribe—public or private, customized per team.

## Field Level Security

- Controls who can see or edit certain fields in expense records, protecting sensitive



data like business justification or remarks.

## Session Settings & Login IP Ranges

- Session settings limit activity duration and control timeout security. IP ranges restrict login locations and reduce security risks.

## Audit Trail

- Tracks all changes, logins, report actions, and configuration modifications for compliance and review. Essential for financial and data governance reviews.