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.


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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).
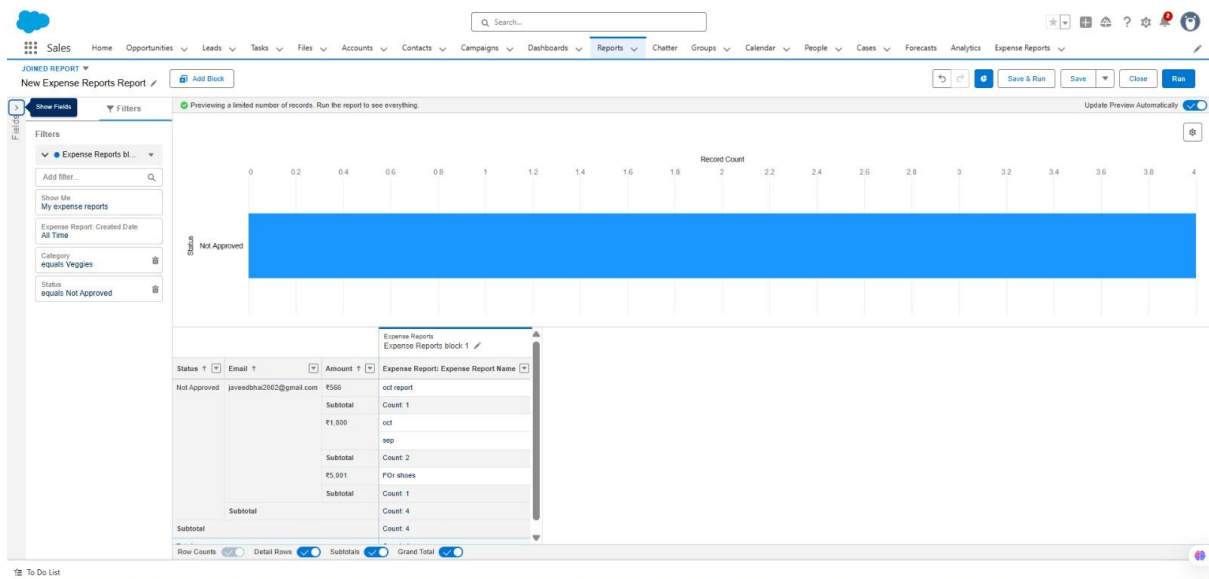
Dashboards

- 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).
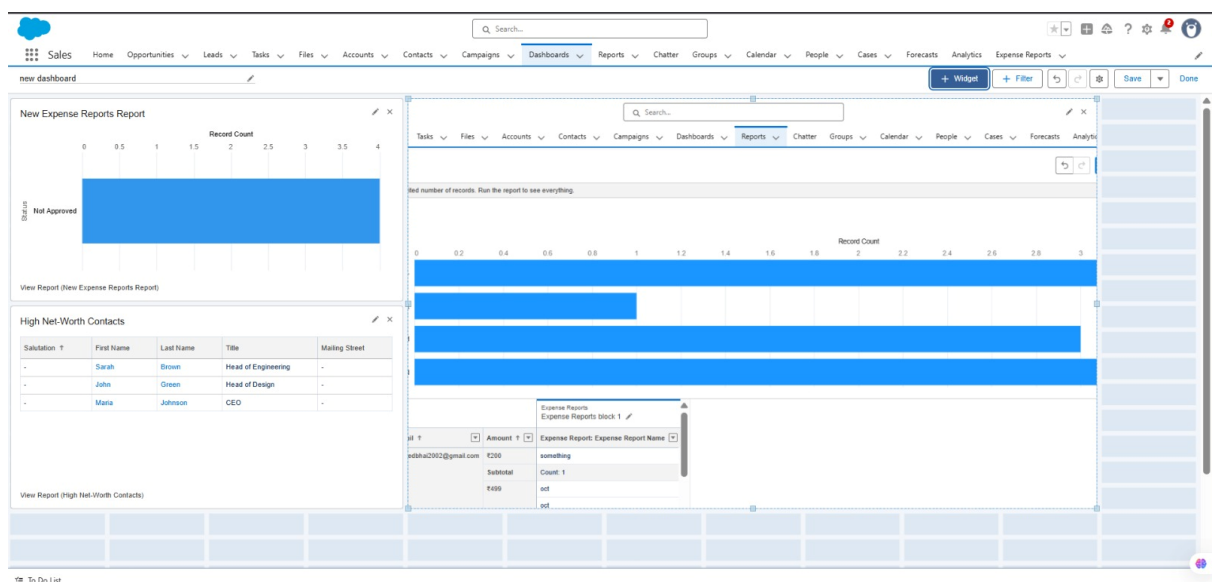

Dynamic Dashboards

- 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
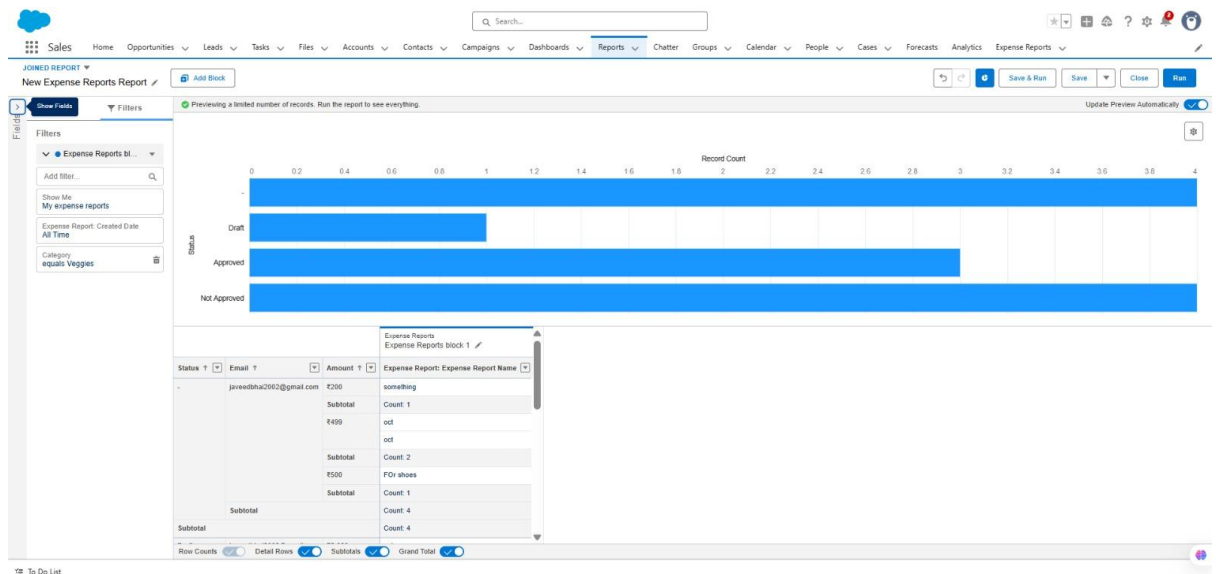
data like business justification or remarks.

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.