**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.

**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.