

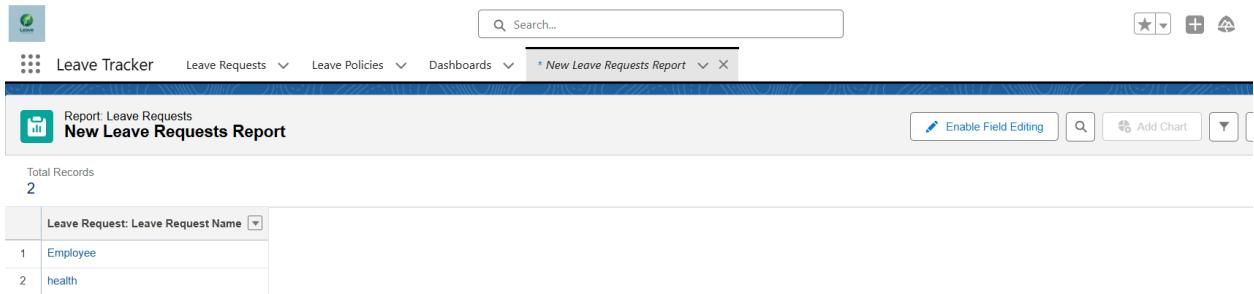
Project: Leave Tracker

Phase 9: Reporting, Dashboards & Security Review

This phase focuses on analyzing data, visualizing key metrics, and ensuring security within the Salesforce Leave Tracker application.

1. Reports (Tabular, Summary, Matrix, Joined)

- **Purpose:** To analyze leave requests, employee data, and trends.
- **Details:** Use different report types to get multiple views of your data:
 - Tabular: Simple lists of records.
 - Summary: Grouped data for better insights.
 - Matrix: Cross-tab analysis.
 - Joined: Combine multiple reports.



The screenshot shows the Salesforce Leave Tracker application interface. At the top, there is a navigation bar with icons for Home, Leave Requests, Leave Policies, and Dashboards. A search bar is located at the top right. Below the navigation bar, a title bar displays "Report: Leave Requests" and "New Leave Requests Report". On the left, a sidebar shows a list of reports under "Leave Requests". The main content area displays a table titled "New Leave Requests Report" with the following data:

Leave Request: Leave Request Name	
1	Employee
2	health

Total Records: 2

Buttons at the top right include "Enable Field Editing", "Add Chart", and a search icon.

2. Report Types

- **Purpose:** To define which objects and fields are available in a report.
- **Details:** Create custom report types to analyze specific combinations of data, e.g., Employees and Leave Requests together.

The screenshot shows the Salesforce Setup interface for creating a custom report type. The left sidebar shows 'Report Types' selected under 'Reports & Dashboards'. The main area displays the 'Leave Requests with Employee Info' report type. The 'Details' section shows the display label, API name, description, and metadata. The 'Fields' section lists the source object as 'Leave Requests' with 8 included fields. The 'Object Relationships' section shows a diagram where 'Leave Requests (A)' is connected to another object (also labeled A). Buttons at the top right include 'Preview Layout', 'Edit Layout', 'Clone', and 'Delete'.

3. Dashboards

- **Purpose:** To visually represent report data for easier tracking.
- **Details:** Show leave statistics, trends, and key metrics for managers or HR.

The screenshot shows the Leave Tracker Dashboard with a 'New Leave Requests Report' widget. The dashboard has a search bar and various filter options. The main area is a large grid intended for displaying report data, which currently appears empty. A small preview window for the report shows a table with columns for 'Leave Request' and 'Employee'.

4. Dynamic Dashboards (Optional but Recommended)

- **Purpose:** Allow users to see data according to their access level.
- **Details:** Enables personalized dashboard views without creating multiple dashboards for each user.

5. Sharing Settings

- **Purpose:** To control who can view or edit records.
- **Details:** Ensure only authorized users can access or modify leave requests or employee data.

The screenshot shows the Salesforce Setup interface for Sharing Settings. The left sidebar lists various setup categories like File Upload and Download, Security, and Platform Encryption. The main content area is titled "Sharing Settings" and displays sharing rules for "Leave Requests".

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: **Leave Requests**

Default Sharing Settings

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Leave Requests	Private	Private	<input checked="" type="checkbox"/>

Other Settings

Manager Groups	<input type="checkbox"/>
Secure guest user record access	<input checked="" type="checkbox"/>
Require permission to view record names in lookup fields	<input type="checkbox"/>

Sharing Rules

Leave Requests Sharing Rules

Action	Criteria	Shared With	Access Level
Edit Del	Owner In Role and Internal Subordinates, Employee	Role and Internal Subordinates, Manager	Read Only

Sharing Overrides

6. Field Level Security

- **Purpose:** To restrict access to sensitive fields.
- **Details:** Hide private information (e.g., salary, comments) from users who do not need access.

The screenshot shows the Salesforce Object Manager interface for the 'Leave Requests' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, and Triggers. The main content area is titled 'Leave Requests Validation Rule' and displays a single record with the following details:

Field	Value
Rule Name	EndDate_After_StartDate
Error Condition Formula	End_Date__c < Start_Date__c
Error Message	End Date cannot be before Start Date
Description	Ensures that the End Date is not before the Start Date
Created By	Gunti Jahnayd, 9/24/2025, 11:47 PM
Active	✓
Error Location	End Date
Modified By	Gunti Jahnayd, 9/24/2025, 11:47 PM

Login IP Ranges

Purpose: Restrict users to log in only from trusted IP addresses.

Step 1: Go to Profiles

1. Go to **Setup → Users → Profiles**.
2. Select the **Profile** you want to restrict (e.g., HR Manager, Employee).

Step 2: Set Login IP Ranges

1. Scroll down to **Login IP Ranges**.
2. Click **New**.
3. Enter **Start IP Address** and **End IP Address**.
 - Example: Start = 192.168.1.1, End = 192.168.1.255
4. Click **Save**.

The screenshot shows the Salesforce Lead Details page for a lead named 'Ms. Gunti Jahnavi'. The lead's information includes Title: 'Lead', Company: 'MITTS', Phone: '(2) 08639849804', and Email: '22691a3156@mits.ac.in'. The status bar at the top indicates the user is 'Logged in as Ravi Kumar (ravi@mits.com.sandbox)' and provides options to 'Log out as Ravi Kumar' and 'Search...'. The main content area displays the lead's contact information and activity history. Activity tabs include 'New Task', 'Log a Call', 'New Event', and 'Email'. A message states 'We found no potential duplicates of this Lead.' and 'Campaign History (0)'. The page is part of the 'Sales' tab.

5.

Tip: Users outside these IPs will be blocked from logging in.

3. Audit Trail

Purpose: Track changes made to setup and configurations.

Step 1: Go to Setup Audit Trail

1. Go to **Setup** → **Security** → **View Setup Audit Trail**.

Step 2: Review Changes

1. You can see:
 - Who made changes
 - When the changes were made
 - What was changed (e.g., object, field, profile settings)