

Phase 9: Reporting, Dashboards & Security Review

Goal:

- Track progress through reports and dashboards
 - Protect sensitive data from unauthorized access
 - Ensure stakeholders see the right information in real time
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Step 1: Reporting

Reports help track Youth, Jobs, and Interviews effectively.

A. Create Reports

1. Go to **App Launcher → Reports → New Report**
2. Select the report type: e.g., **Interview** or **Custom Report**
3. Add fields:
 - Candidate Name (Youth__c Name)
 - Job Title (Job__c Name)
 - Interview Date (Interview_Date__c)
 - Status (Status__c)
4. Save & Run the report

B. Useful Reports

- **Interviews by Status** → Group by Status__c (Shows Scheduled vs Completed interviews)
- **Interviews by Result** → Group by Result__c (Shows Qualified, Shortlisted, Rejected outcomes)
- **Interviews Over Time** → Group by Last Interview Date (Shows trends or frequency of interviews)

Step 2: Dashboards

Dashboards visually display metrics from reports.

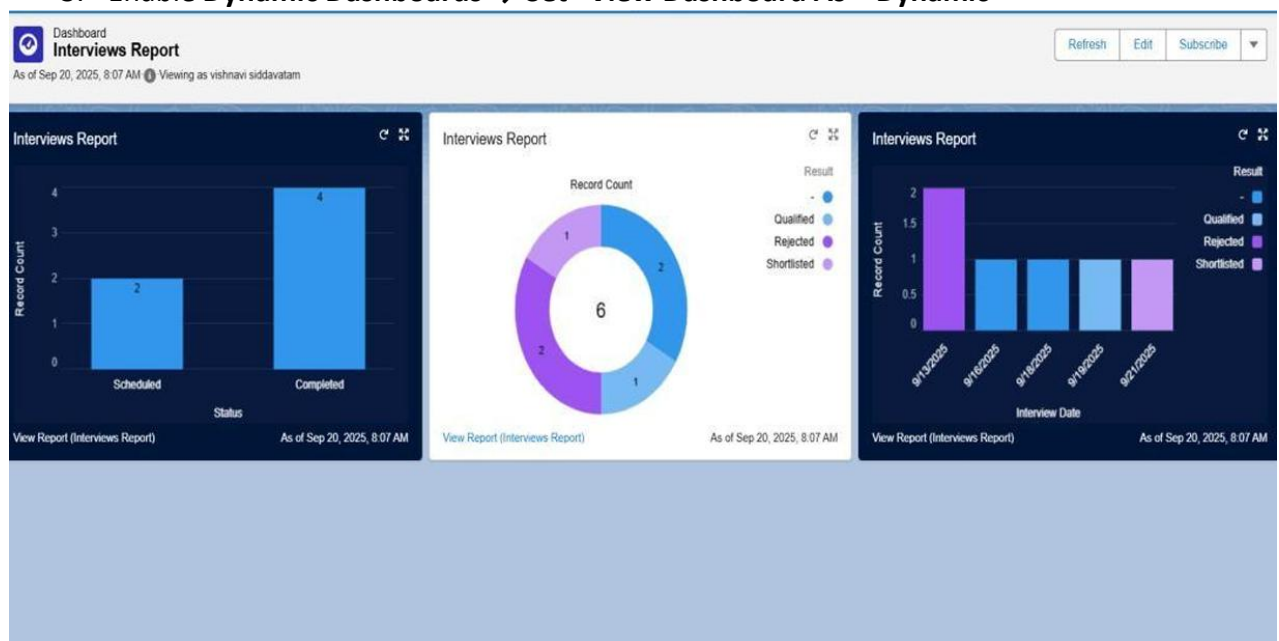
A. Create Dashboard

1. Go to **App Launcher** → **Dashboards** → **New**

2. Add components:

- **Metric:** Count of Completed Interviews
- **Bar Chart:** Interviews by Status
- **Line Chart:** Interviews per Week
- **Table:** Recent Interviews

3. Enable **Dynamic Dashboards** → Set **“View Dashboard As = Dynamic”**

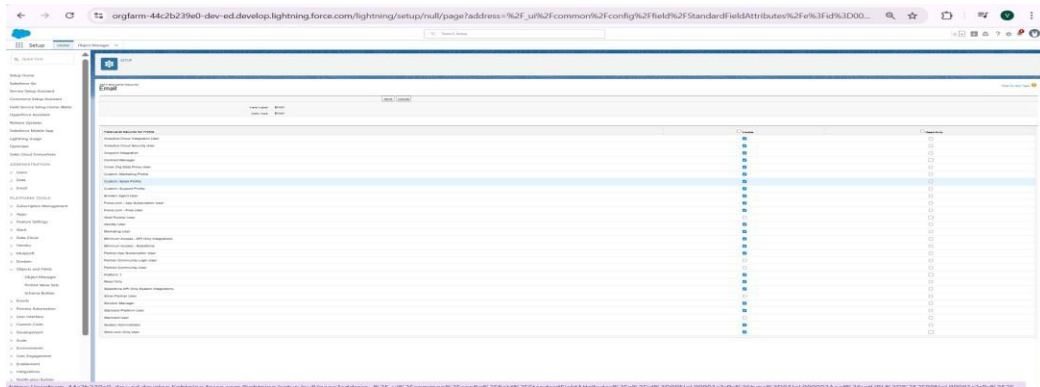


Step 3: Security

Protect sensitive data (like Youth emails, interview feedback) and control who can see what.

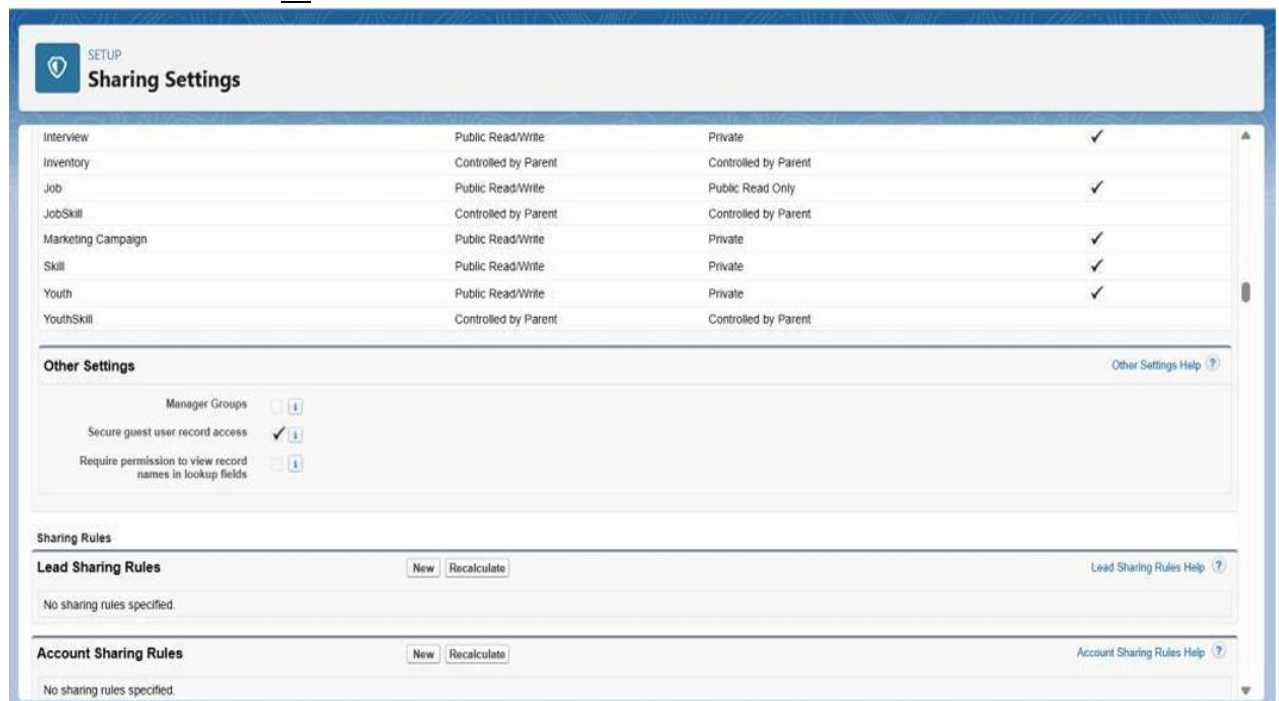
A. Field-Level Security (FLS)

1. Setup → Object Manager → Youth__c → Fields → Email__c → Set Field-Level Security
2. Hide fields from standard users or users without permission



B. Sharing & Org-Wide Defaults (OWD)

1. Setup → Sharing Settings
2. Ensure Youth__c = Private



C. Audit Trail

1. Setup → View Setup Audit Trail
2. Track unauthorized changes or admin activity



SETUP

View Setup Audit Trail

The last 20 entries for your organization are listed below. You can [download](#) your organization's setup audit trail for the last six months (Excel .csv file).

View Setup Audit Trail

Date	User	Source Namespace Prefix	Action	Section	Delegate User ?
11/4/2025, 9:10:42 PM PST	korrasunilkumar04509@agentforce.com		Added standard button override on Youths. View (Lightning Page null)	Custom Objects	
11/4/2025, 9:09:51 PM PST	korrasunilkumar04509@agentforce.com		Created Lightning Page: Youth	Lightning Pages	
11/4/2025, 8:56:02 PM PST	korrasunilkumar04509@agentforce.com		Created custom app SkillMatch	Custom Apps	
11/4/2025, 8:56:02 PM PST	korrasunilkumar04509@agentforce.com		Created Lightning Page: SkillMatch UtilityBar	Lightning Pages	
11/4/2025, 8:54:37 PM PST	korrasunilkumar04509@agentforce.com		Deleted custom app SkillMatch	Custom Apps	
11/4/2025, 8:54:37 PM PST	korrasunilkumar04509@agentforce.com		Deleted Lightning Page: SkillMatch UtilityBar	Lightning Pages	
11/4/2025, 8:54:09 PM PST	korrasunilkumar04509@agentforce.com		Created Lightning Page: SkillMatch UtilityBar	Lightning Pages	
11/4/2025, 8:54:09 PM PST	korrasunilkumar04509@agentforce.com		Created custom app SkillMatch	Custom Apps	
11/4/2025, 3:49:39 AM PST	korrasunilkumar04509@agentforce.com		New Youths validation rule "Email_Required"	Validation Rules	
11/4/2025, 3:40:30 AM PST	korrasunilkumar04509@agentforce.com		Activated flow with Name "Interview Completed" and Unique Name "Interview_Completed"	Flows	
11/4/2025, 3:40:16 AM PST	korrasunilkumar04509@agentforce.com		Created flow with Name "Interview Completed" and Unique Name "Interview_Completed"	Flows	
11/4/2025, 3:37:47 AM PST	korrasunilkumar04509@agentforce.com		Activated flow with Name "Interview Scheduled Flow" and Unique Name "Interview_Scheduled_Flow"	Flows	
11/4/2025, 3:37:43 AM PST	korrasunilkumar04509@agentforce.com		Deleted flow version #-1 "Interview Scheduled Flow" for flow with Unique Name "Interview_Scheduled_Flow"	Flows	
11/4/2025, 3:37:42 AM PST	korrasunilkumar04509@agentforce.com		Created flow version #1 "Interview Scheduled Flow" for flow with Unique Name "Interview_Scheduled_Flow"	Flows	
11/4/2025, 3:32:42 AM PST	korrasunilkumar04509@agentforce.com		Created flow with Name "Interview Scheduled Flow" and Unique Name "Interview_Scheduled_Flow"	Flows	
11/4/2025, 3:30:52 AM PST	korrasunilkumar04509@agentforce.com		Activated flow with Name "Welcome Email Template" and Unique Name "Welcome_Email_Template"	Flows	
11/4/2025, 3:30:48 AM PST	korrasunilkumar04509@agentforce.com		Deleted flow version #-1 "Welcome Email Template" for flow with Unique Name "Welcome_Email_Template"	Flows	
11/4/2025, 3:30:43 AM PST	korrasunilkumar04509@agentforce.com		Created flow version #1 "Welcome Email Template" for flow with Unique Name "Welcome_Email_Template"	Flows	
11/4/2025, 3:24:39 AM PST	korrasunilkumar04509@agentforce.com		Deactivated flow with Name "Welcome Email Template" and Unique Name "Welcome_Email_Template"	Flows	
11/4/2025, 3:24:39 AM PST	korrasunilkumar04509@agentforce.com		Deleted flow version #-1 "Welcome Email Template" for flow with Unique Name "Welcome_Email_Template"	Flows	

[Download setup audit trail for last six months \(Excel .csv file\)](#)

[develop.my.salesforce-setup.com/lightning/setup/SecurityEvents/home](#)