

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)

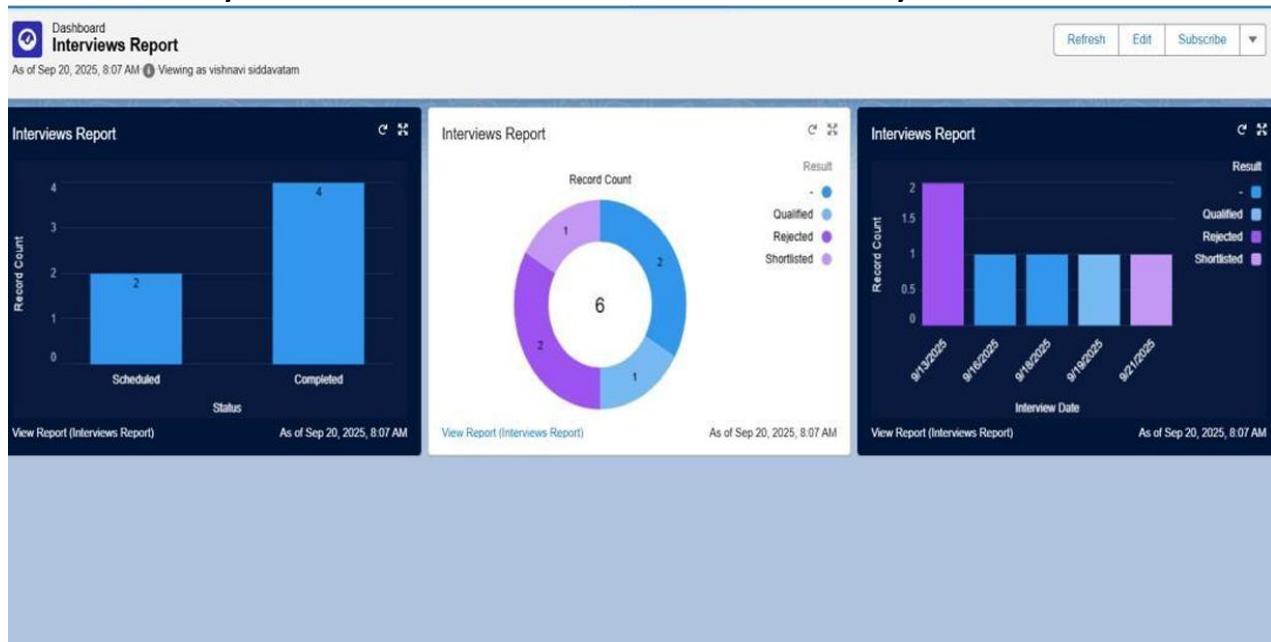
Step 2: Dashboards

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”

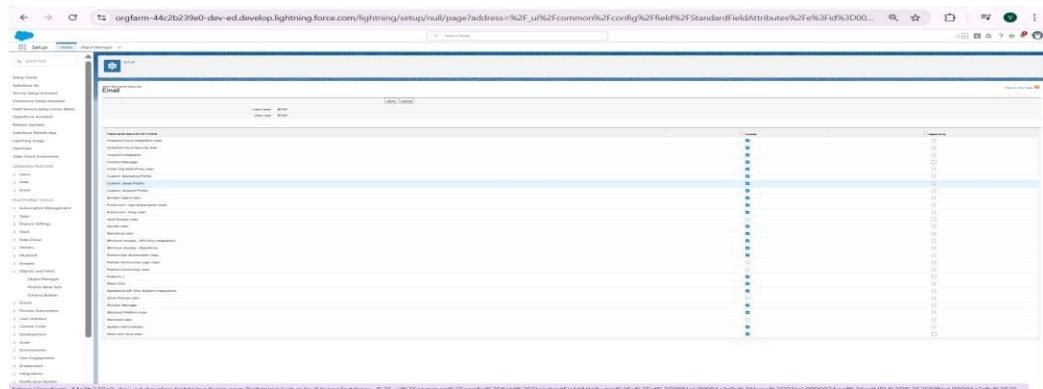


Step 3: Security

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

A screenshot of the Salesforce Sharing Settings page. The top header says "Sharing Settings". The main section lists various objects and their sharing defaults: Interview (Public Read/Write), Inventory (Controlled by Parent), Job (Public Read/Write), JobSkill (Controlled by Parent), Marketing Campaign (Public Read/Write), Skill (Public Read/Write), Youth (Public Read/Write), and YouthSkill (Controlled by Parent). Below this is a "Other Settings" section with checkboxes for "Manager Groups" (unchecked), "Secure guest user record access" (checked), and "Require permission to view record names in lookup fields" (unchecked). At the bottom, there are sections for "Sharing Rules" (Lead Sharing Rules and Account Sharing Rules, both with "No sharing rules specified").

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).

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