

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)

Interviews Report			
Total Records	Interview Date	Candidate Name	Job
6			
Scheduled (2)	9/16/2025 (1)	YID-0009	Developer
	Subtotal		
	9/18/2025 (1)	YID-0001	Java Developer
	Subtotal		
	Subtotal		
Completed (4)	9/19/2025 (1)	YID-0009	Developer
	Subtotal		
Rejected (2)	9/13/2025 (2)	YID-0009	designer
	Subtotal	YID-0009	Developer
Subtotal			
Shortlisted (1)	9/21/2025 (1)	YID-0009	designer
	Subtotal		
Subtotal			
Total (6)			

Row Counts: Detail Rows: Subtotals: Grand Total:

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”

Refresh
Edit
Subscribe

Interviews Report

Record Count

Scheduled Completed

As of Sep 20, 2025, 8:07 AM

[View Report \(Interviews Report\)](#)

Interviews Report

Record Count

Qualified Rejected Shortlisted

As of Sep 20, 2025, 8:07 AM

[View Report \(Interviews Report\)](#)

Interviews Report

Record Count

Interview Date

9/13/2025 9/16/2025 9/18/2025 9/19/2025 9/21/2025

As of Sep 20, 2025, 8:07 AM

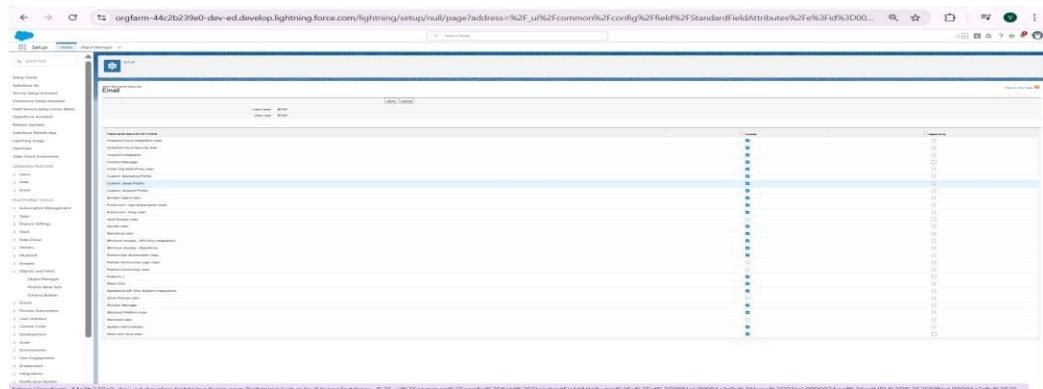
[View Report \(Interviews Report\)](#)

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

