

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)

CareerBridge

Jobs

Jobskills

Youths

Youthskills

Skills

Interviews

Dashboards

Reports

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Step 2: Dashboards

Dashboards visually display metrics from reports.

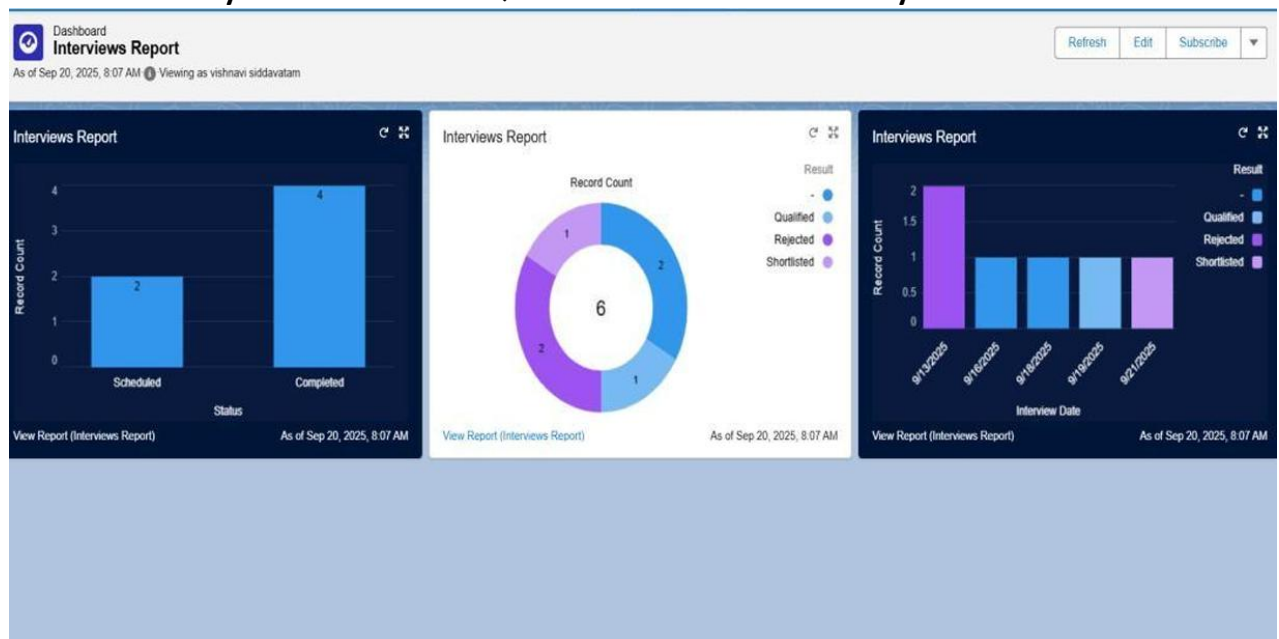
A. Create Dashboard

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”**

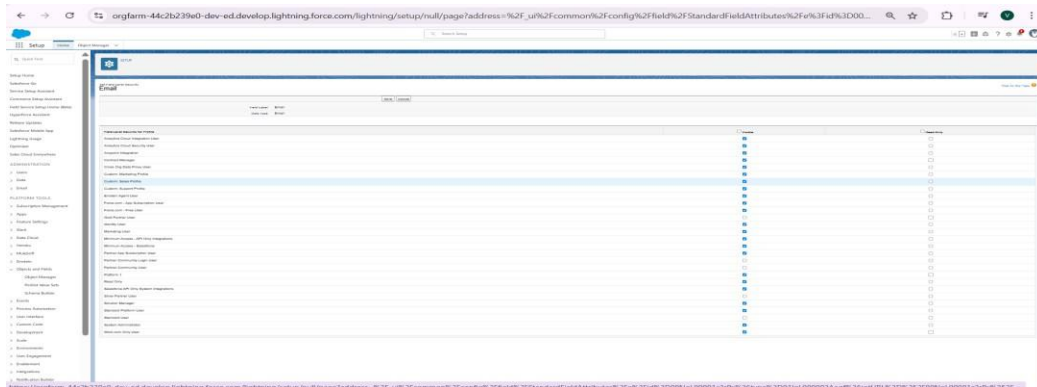


Step 3: Security

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

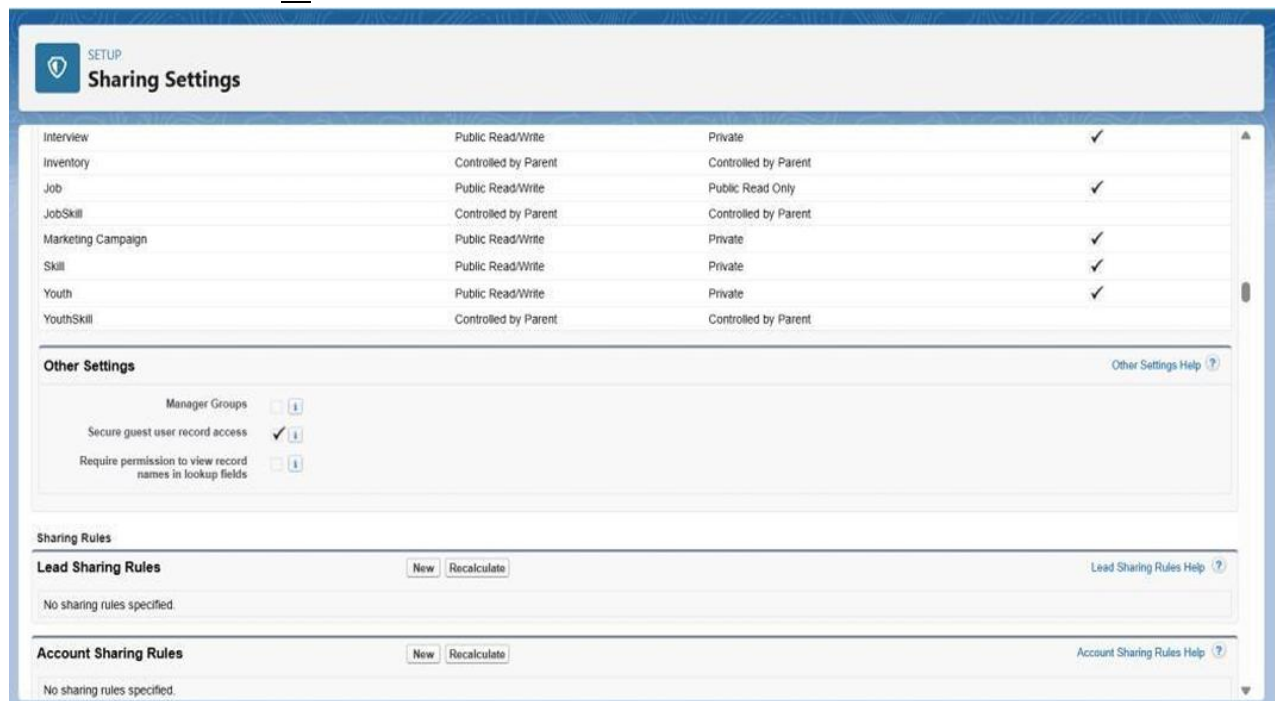
A. Field-Level Security (FLS)

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

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