Expense Tracker Project (Phase 9: Reporting, Dashboards & Security Review)

Goal:

The goal of this project is to build a **Salesforce-based Expense Tracker** that provides actionable insights, visual reporting, and strong security. Customized dashboards and reports help managers and finance teams monitor expenses, approvals, and reimbursements, while security measures protect sensitive employee and financial data.

Problem Statement:

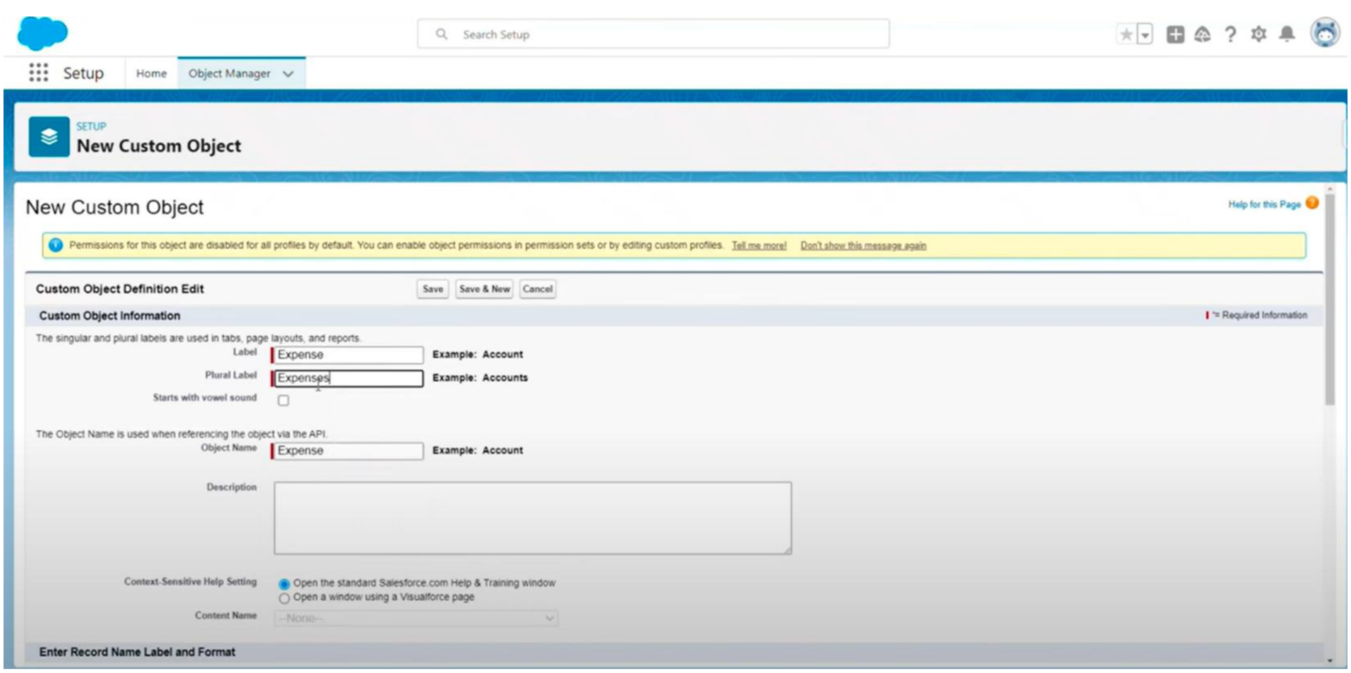
Organizations need accurate reporting and secure access to expense data to make informed decisions. Without dashboards, reports, and proper security, expense management becomes error-prone, slow, and vulnerable to unauthorized access.

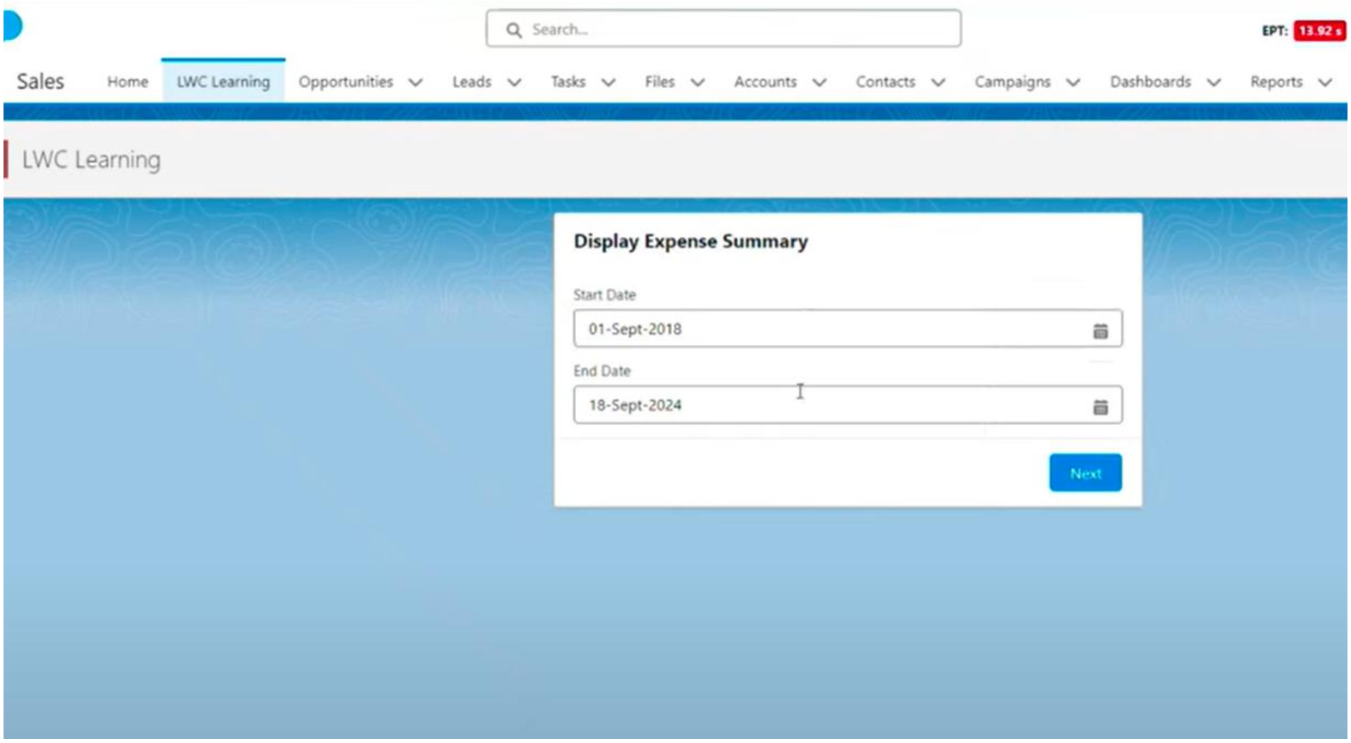
Phase 9: Reporting, Dashboards & Security Review

Phase 9 focuses on **Reporting, Dashboards, and Security Review** within Salesforce. In this phase, various reports and dashboards were created to provide actionable insights, and security measures were applied to ensure that sensitive student and financial data remains protected.

Reports

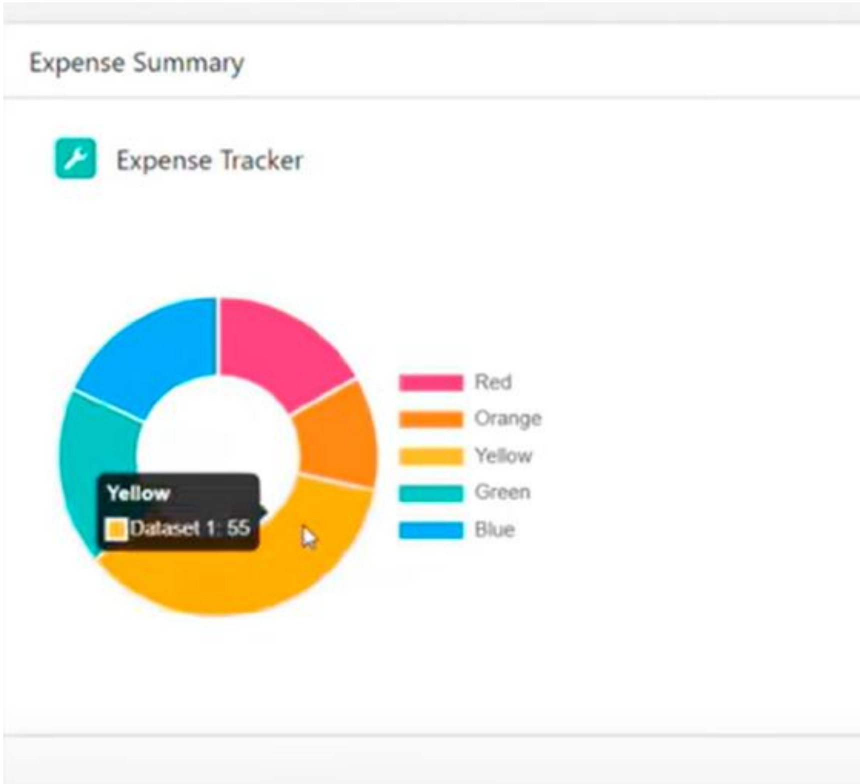
- Created **Expense Reports** to track submitted, approved, and rejected expenses.
- Designed **Payment Status Reports** to monitor pending and reimbursed expenses.
- Built **Department-wise Expense Reports** to analyze spending trends.
- Enabled filters and grouping options for managers and finance teams to analyze data efficiently.

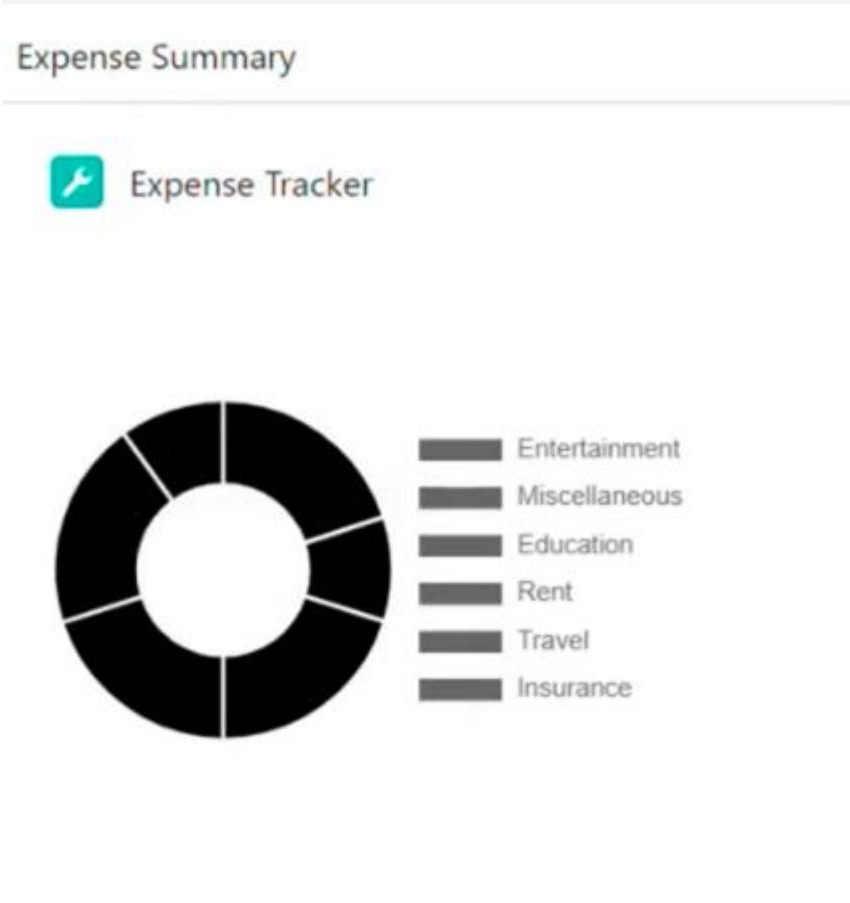




Dashboards

- Developed a **Management Dashboard** with visual charts showing admissions, revenue, and enrollment trends.
- Configured **Dynamic Dashboards** to ensure that users only see data according to their roles (e.g., faculty, management).
- Used graphs and visual indicators for **real-time decision-making**.





Security Review

- Applied **Field-Level Security (FLS)** to protect sensitive data such as student personal details and fee records.
- Enabled **Audit Trail** to track configuration and data changes made by administrators.

- Configured **Login IP Ranges** and **Session Settings** to enhance login security.
- Reviewed **Sharing Settings** to ensure controlled access to records based on role hierarchy.

Conclusion

Phase 9 successfully provided **data-driven insights** through reports and dashboards, while also reinforcing **security and compliance**. With these measures, the system became more **transparent, secure, and reliable**, empowering institutes to make informed decisions while safeguarding student information.