Corporate Travel & Expense Management System Project

Phase 9: Reporting, Dashboards & Security Review

🔅 **Goal:** Monitor travel/expense data & secure access.

1. Reports

- Travel Requests by Status (**Travel_Request__c.Status__c**).

- Expense Claims by Category (**Expense_Claim__c.Category__c**).

- Employee-wise Travel Requests & Expense Totals.
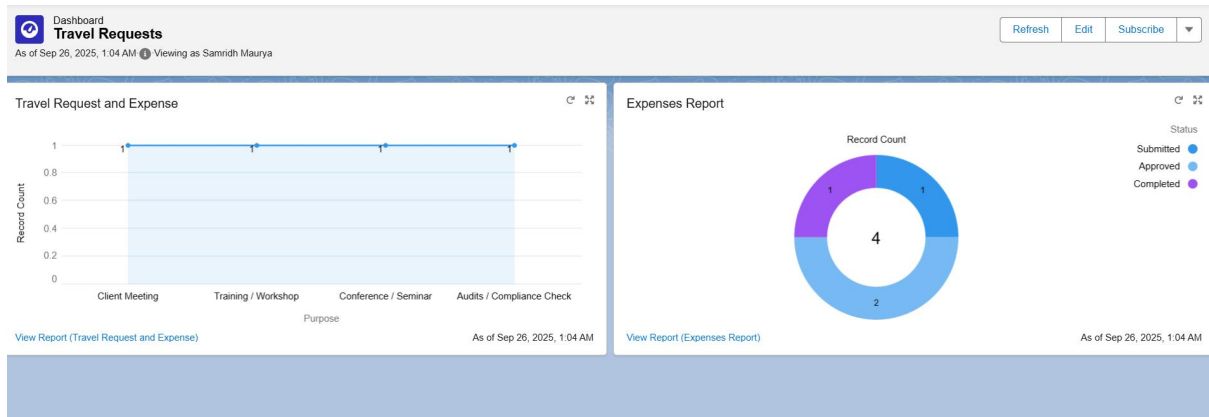
- Pending Approvals by Manager.

2. Report Types

- Custom report type: Travel Request + Expense Claim.

- Enables linking parent **Travel_Request__c** with child

  Expense_Claim__c.

3. Dashboards

- o Manager Dashboard: Pending approvals & high-value requests.

- o Employee Dashboard: My Travel Requests & Expense Claims.

- o Finance Dashboard: Approved vs Reimbursed expenses, top categories.
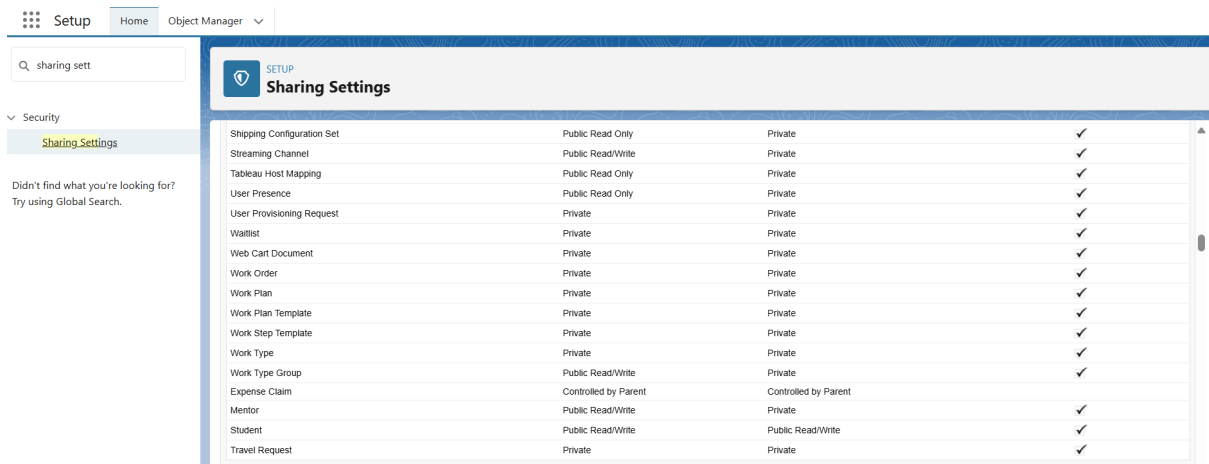

4. Dynamic Dashboards

- o Each Employee sees only their own **Travel Requests/Claims**.

- o Managers see requests from their team (role hierarchy).

5. Sharing Settings

- o **Travel_Request__c** → Private.

- o **Expense_Claim__c** → Private.

- o Managers/Finance get access via Sharing Rules.

| Shipping Configuration Set | Public Read Only | Private | ✔ |
Streaming Channel	Public Read/Write	Private	✔
Tableau Host Mapping	Public Read Only	Private	✔
User Presence	Public Read Only	Private	✔
User Provisioning Request	Private	Private	✔
Waitlist	Private	Private	✔
Web Cart Document	Private	Private	✔
Work Order	Private	Private	✔
Work Plan	Private	Private	✔
Work Plan Template	Private	Private	✔
Work Step Template	Private	Private	✔
Work Type	Private	Private	✔
Work Type Group	Public Read/Write	Private	✔
Expense Claim	Controlled by Parent	Controlled by Parent	
Mentor	Public Read/Write	Private	✔
Student	Public Read/Write	Public Read/Write	✔
Travel Request	Private	Private	✔

6. Field Level Security

- Hide sensitive fields (e.g., **Total_Claimed__c**) from Employees.

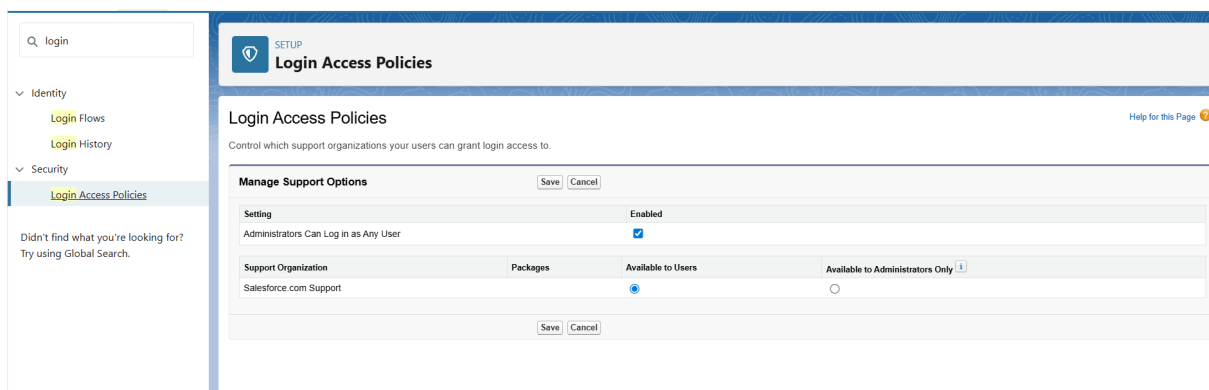- Visible only to Finance Profile.
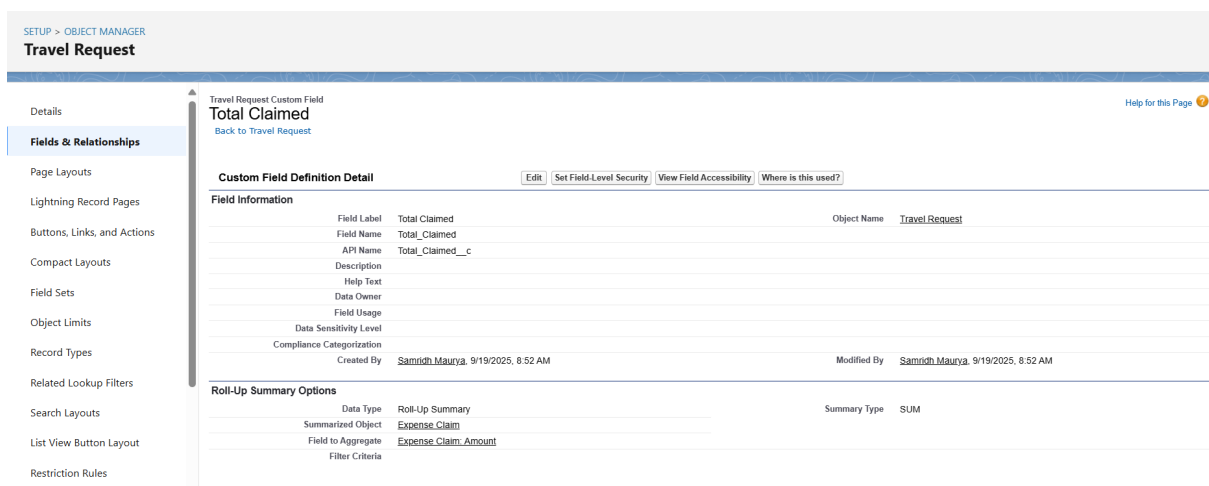
7. Session Settings

- Auto logout inactive users after 30 minutes**.**
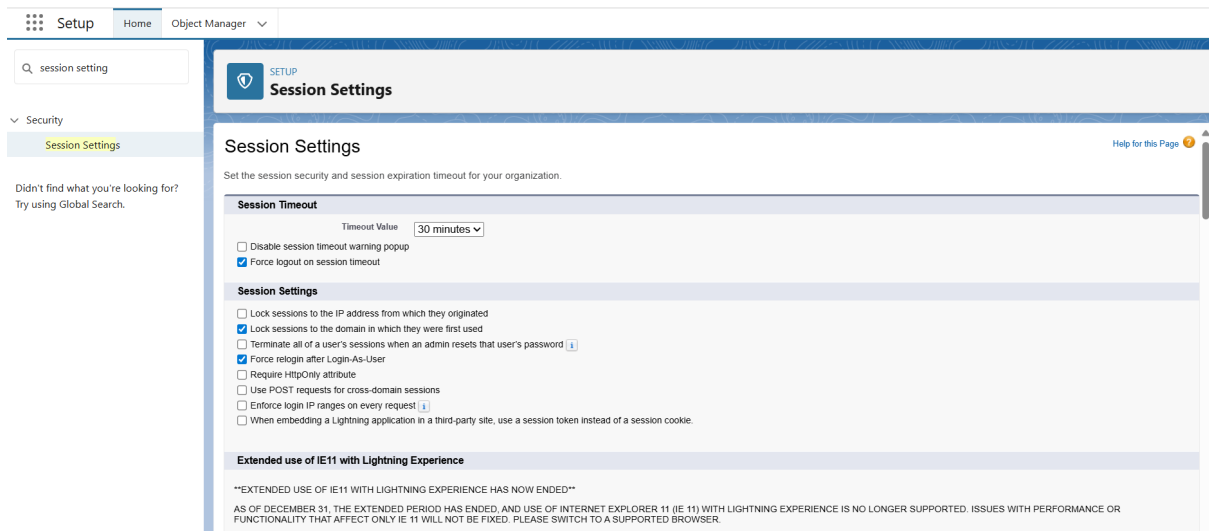
8. Login IP Ranges

- o Restrict Employee Profile to office IP ranges.

- o Managers/Finance may have wider access.

9. Audit Trail

- o Enable Setup Audit Trail → track changes (e.g., who modified

  Approval Processes or Sharing Rules).

🔍 audit

⌄ Security

    View Setup Audit Trail

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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 ?
9/26/2025, 5:52:59 AM PDT	samridh.maurya.aiml22574@agentforce.com		Changed Session Timeout Value from 120 to 30 minutes	Session Settings	
9/26/2025, 5:52:59 AM PDT	samridh.maurya.aiml22574@agentforce.com		Changed New User Email Link Expiration from 1 day to 7 days	Session Settings	
9/26/2025, 5:52:34 AM PDT	samridh.maurya.aiml22574@agentforce.com		Changed New User Email Link Expiration from 7 days to 1 day	Session Settings	
9/26/2025, 5:49:52 AM PDT	samridh.maurya.aiml22574@agentforce.com		Changed profile Manager: field-level security for Travel Request: Total Claimed was changed from Read Only to No Access	Manage Users	
9/26/2025, 5:49:52 AM PDT	samridh.maurya.aiml22574@agentforce.com		Changed profile Work.com Only User: field-level security for Travel Request: Total Claimed was changed from 1 to 0	Manage Users	
9/26/2025, 5:49:52 AM PDT	samridh.maurya.aiml22574@agentforce.com		Changed profile System Administrator: field-level security for Travel Request: Total Claimed was changed from Read Only to No Access	Manage Users	
9/26/2025, 5:49:52 AM PDT	samridh.maurya.aiml22574@agentforce.com		Changed profile Support/HR: field-level security for Travel Request: Total Claimed was changed from Read Only to No Access	Manage Users	
9/26/2025, 5:49:52 AM PDT	samridh.maurya.aiml22574@agentforce.com		Changed profile Standard Platform User: field-level security for Travel Request: Total Claimed was changed from Read Only to No Access	Manage Users	
9/26/2025, 5:49:52 AM PDT	samridh.maurya.aiml22574@agentforce.com		Changed profile Solution Manager: field-level security for Travel Request: Total Claimed was changed from Read Only to No Access	Manage Users	
9/26/2025, 5:49:52 AM PDT	samridh.maurya.aiml22574@agentforce.com		Changed profile Salesforce API Only System Integrations: field-level security for Travel Request: Total Claimed was changed from Read Only to No Access	Manage Users	
9/26/2025, 5:49:52 AM PDT	samridh.maurya.aiml22574@agentforce.com		Changed profile Read Only: field-level security for Travel Request: Total Claimed was changed from Read Only to No Access	Manage Users	
9/26/2025, 5:49:52 AM PDT	samridh.maurya.aiml22574@agentforce.com		Changed profile Partner App Subscription User: field-level security for Travel Request: Total Claimed was changed from 1 to 0	Manage Users	
9/26/2025, 5:49:52 AM PDT	samridh.maurya.aiml22574@agentforce.com		Changed profile Minimum Access - Salesforce: field-level security for Travel Request: Total Claimed was	Manage	