

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.

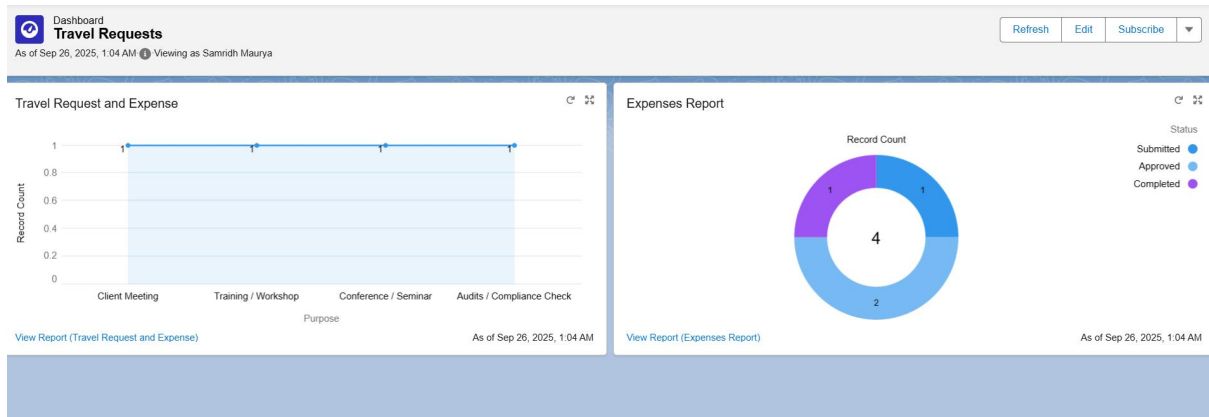
Report: Travel Requests with Expense Claims Travel Request and Expense				Enable Field Editing 🔍 Add Chart 📉 🔄 Edit ▼				
Total Records 4								
<input type="checkbox"/> Purpose ↑	Travels Name	Expense Claim Name	Total Claimed					
<input type="checkbox"/> Client Meeting (1)	Meet For fun	Learner	₹870.00					
Subtotal								
<input type="checkbox"/> Training / Workshop (1)	Sandbox	Learner	₹870.00					
Subtotal								
<input type="checkbox"/> Conference / Seminar (1)	Salesforce Business Meeting	Meeting	₹450.00					
Subtotal								
<input type="checkbox"/> Audits / Compliance Check (1)	Recruitment	Recruit	₹259.00					
Subtotal								
Total (4)								

2. Report Types

- Custom report type: Travel Request + Expense Claim.
- Enables linking parent **Travel_Request__c** with child **Expense_Claim__c**.

3. Dashboards

- Manager Dashboard: Pending approvals & high-value requests.
- Employee Dashboard: My Travel Requests & Expense Claims.
- Finance Dashboard: Approved vs Reimbursed expenses, top categories.

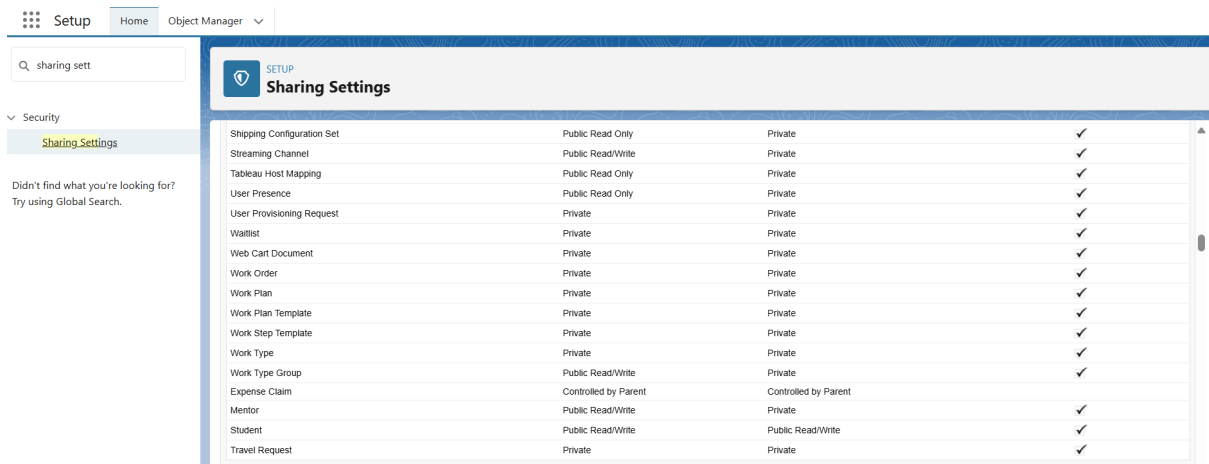


4. Dynamic Dashboards

- Each Employee sees only their own **Travel Requests/Claims**.
- Managers see requests from their team (role hierarchy).

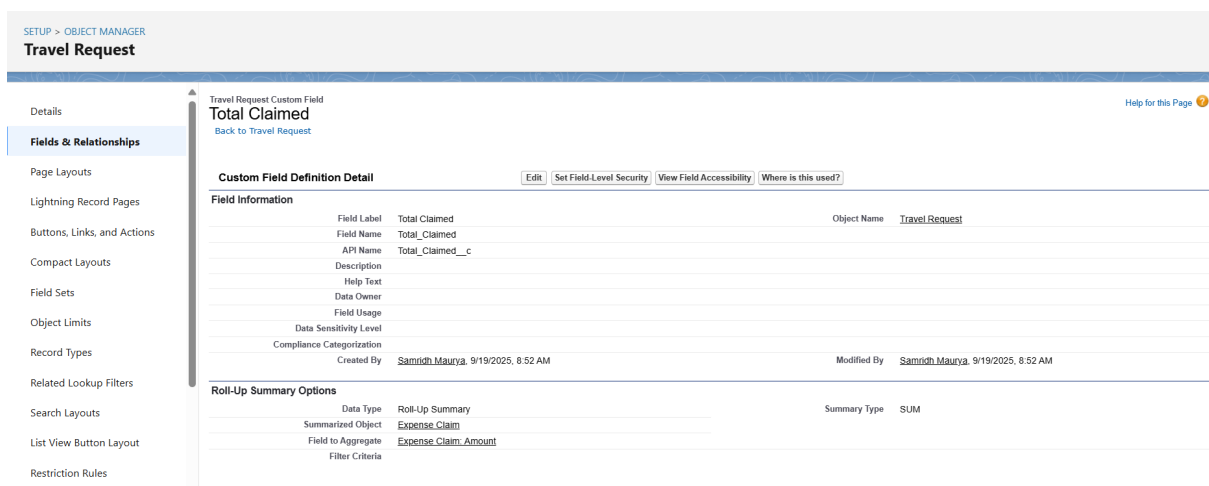
5. Sharing Settings

- **Travel_Request__c** → Private.
- **Expense_Claim__c** → Private.
- Managers/Finance get access via Sharing Rules.



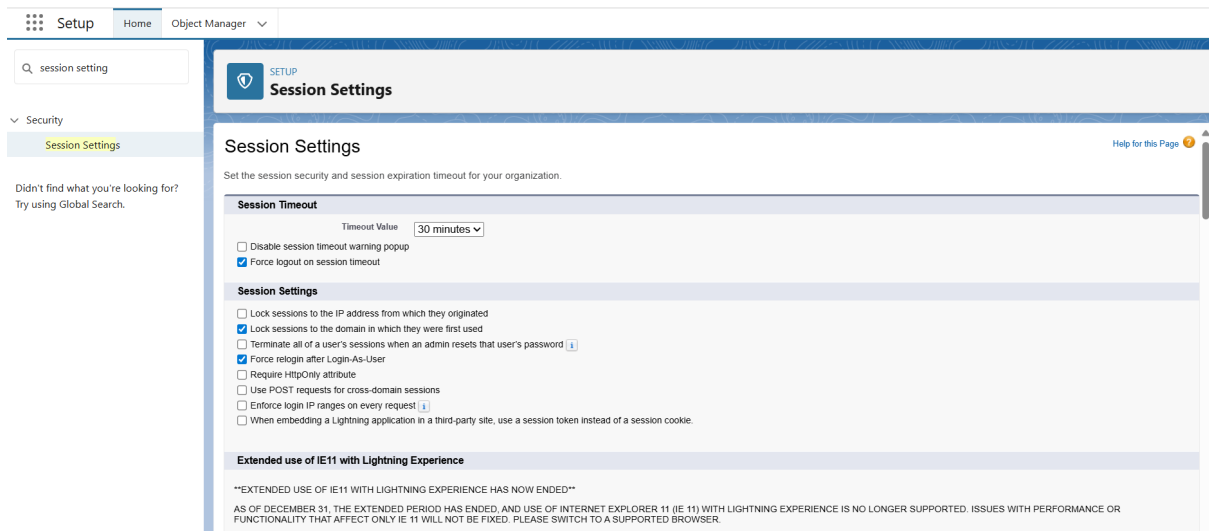
6. Field Level Security

- Hide sensitive fields (e.g., **Total_Claimed__c**) from Employees.
- Visible only to Finance Profile.



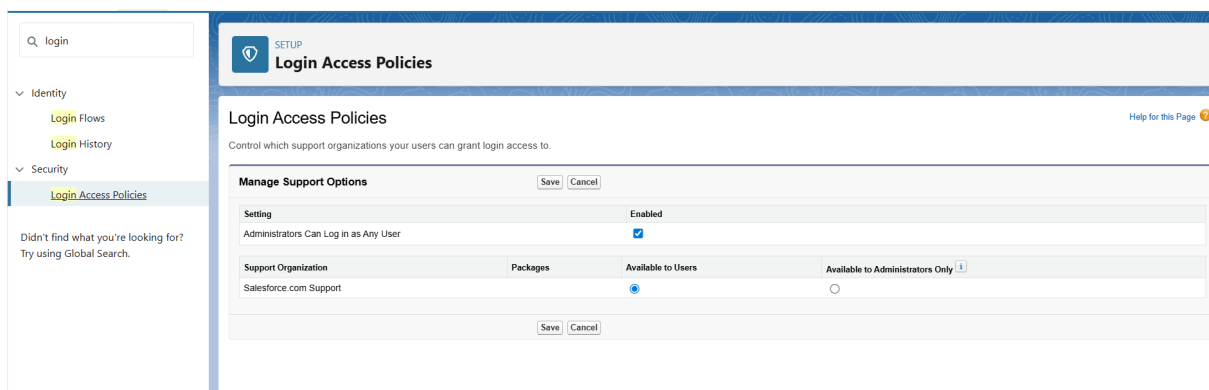
7. Session Settings

- Auto logout inactive users after 30 minutes.



8. Login IP Ranges

- Restrict Employee Profile to office IP ranges.
- Managers/Finance may have wider access.



9. Audit Trail

- Enable Setup Audit Trail → track changes (e.g., who modified Approval Processes or Sharing Rules).

Setup

Home

Object Manager

Q audit

Security

View Setup Audit Trail

Didn't find what you're looking for?
Try using Global Search.

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	samrith.maurya.aim22574@agentforce.com		Changed Session Timeout Value from 120 to 30 minutes	Session Settings	
9/26/2025, 5:52:59 AM PDT	samrith.maurya.aim22574@agentforce.com		Changed New User Email Link Expiration from 1 day to 7 days	Session Settings	
9/26/2025, 5:52:34 AM PDT	samrith.maurya.aim22574@agentforce.com		Changed New User Email Link Expiration from 7 days to 1 day	Session Settings	
9/26/2025, 5:49:52 AM PDT	samrith.maurya.aim22574@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	samrith.maurya.aim22574@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	samrith.maurya.aim22574@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	samrith.maurya.aim22574@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	samrith.maurya.aim22574@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	samrith.maurya.aim22574@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	samrith.maurya.aim22574@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	samrith.maurya.aim22574@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	samrith.maurya.aim22574@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	samrith.maurya.aim22574@agentforce.com		Changed profile Minimum Access - Salesforce: field-level security for Travel Request: Total Claimed was	Manage	