

Corporate Travel & Expense Management System Project

Phase 8: 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.

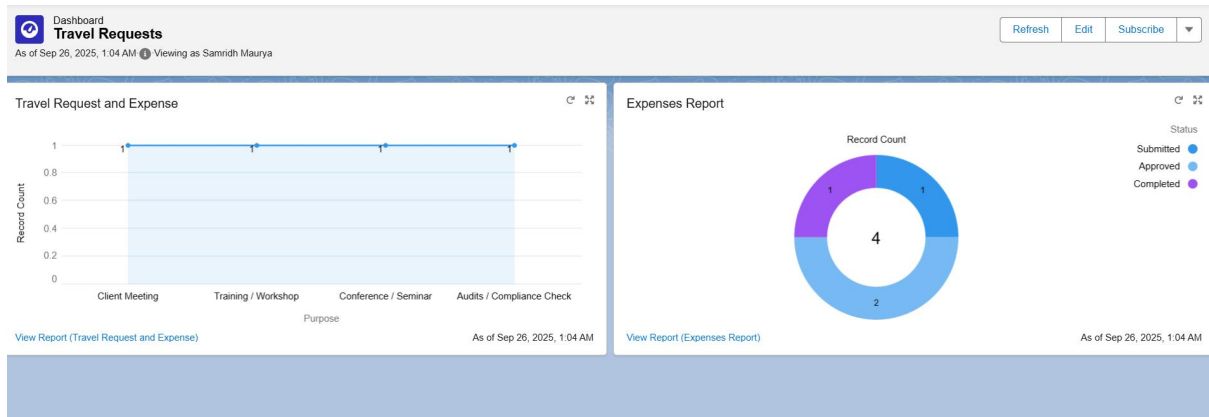
Report: Travel Requests with Expense Claims Travel Request and Expense			
Total Records 4			
<input type="checkbox"/> Purpose ↑	Travels Name	Expense Claim Name	Total Claimed
<input type="checkbox"/> Client Meeting (1)	Meet For fun	Learner	₹870.00
Subtotal			
<input type="checkbox"/> Training / Workshop (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.

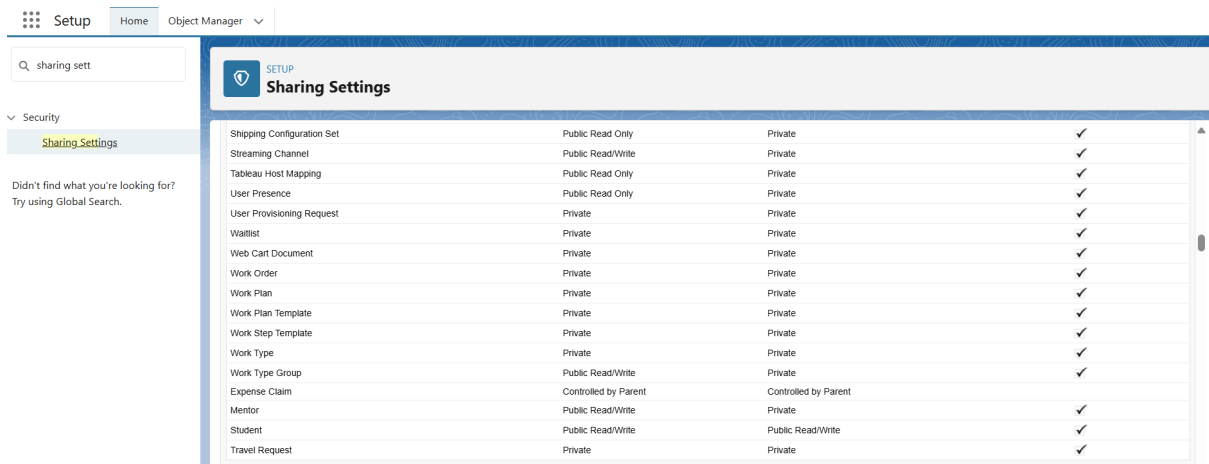


4. Dynamic Dashboards

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

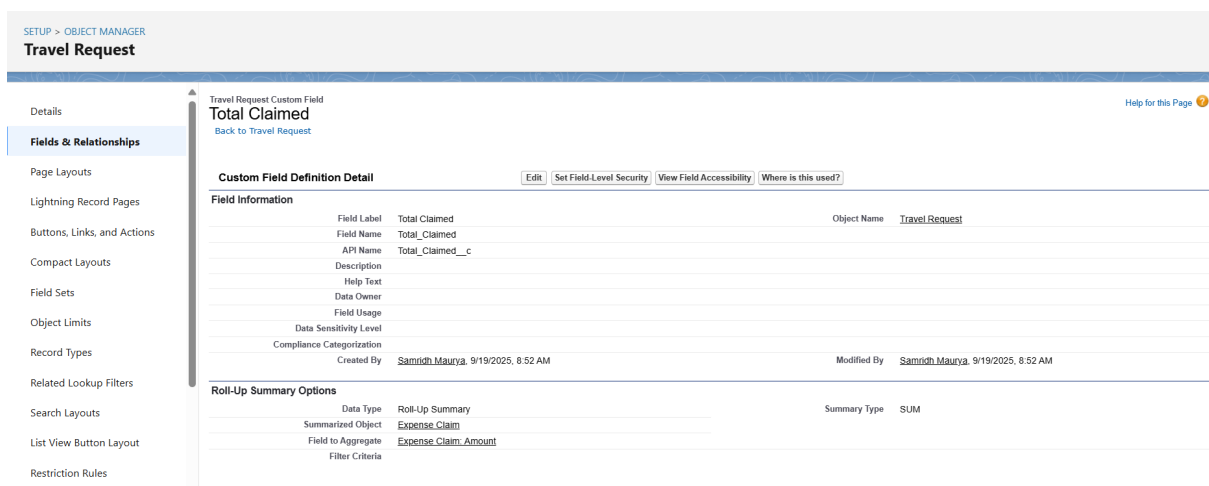
5. Sharing Settings

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



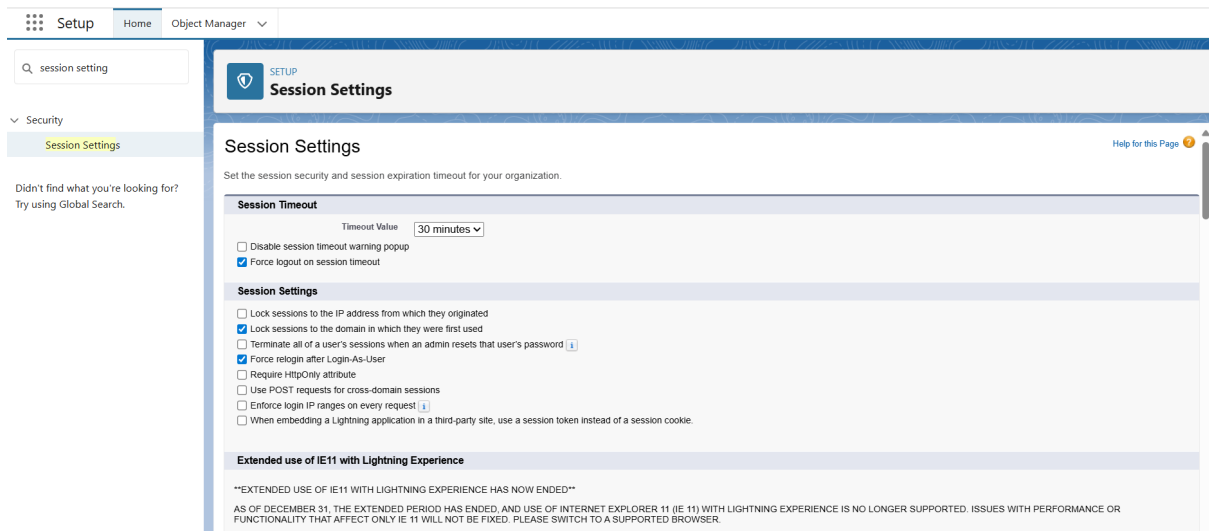
6. Field Level Security

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



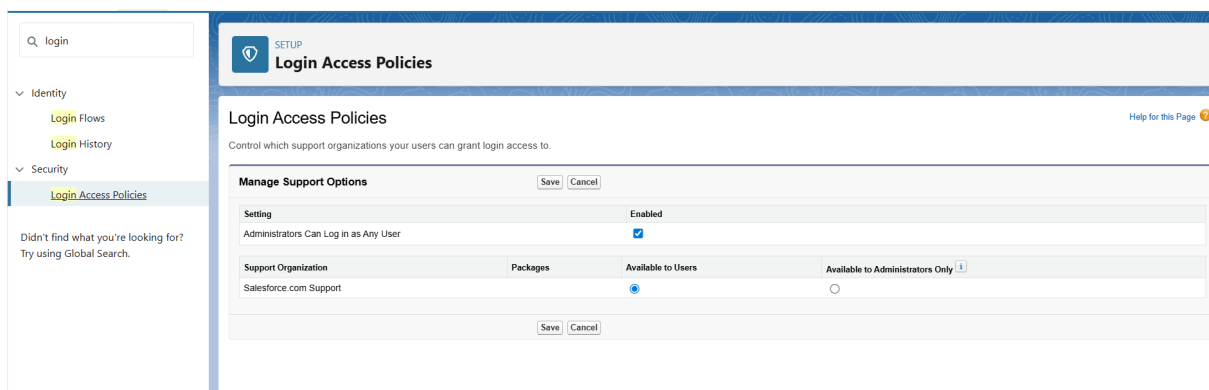
7. Session Settings

- 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).

Q audit

Security

View Setup Audit Trail

Didn't find what you're looking for?
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VIEW

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).

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	