# <u>Employee Onboarding & Asset Management CRM Project</u>

## Phase 9: Reporting, Dashboards & Security Review Implementation

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**Objective:**

Provide real-time insights for HR, IT, and Managers while ensuring secure access to sensitive employee and asset data.

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### 1. Reports Implementation

**Purpose:** Enable departments to analyze onboarding efficiency, asset utilization, and approval trends.

**Steps:**

1. **Create Custom Report Types:**

   o **Employee Onboarding Report Type:** Include Employee Object + Onboarding Task Object.

   o **Asset Management Report Type:** Include Asset Object + Employee Object.

   o **Approval Requests Report Type:** Include Asset Requests + Approvals.

2. **Configure Reports:**

   o **Tabular Reports:** Quick lists, e.g., Pending Onboarding Tasks.

   o **Summary Reports:** Group by Department, Manager, or Asset Type.

   o **Matrix Reports:** Compare asset allocation across departments and locations.

   o **Joined Reports:** Combine Employee Onboarding and Asset Status for end-to-end visibility.

3. **Filters & Conditions:**

   o Only show **active employees** or **unreturned assets**.

   o Filter by **department, manager, location, or asset type**.

**Reports:**

- Pending onboarding tasks per department.

- Asset allocation by category (laptops, ID cards, etc.).

- High-value asset requests awaiting approval.

- Offboarding asset return compliance report.
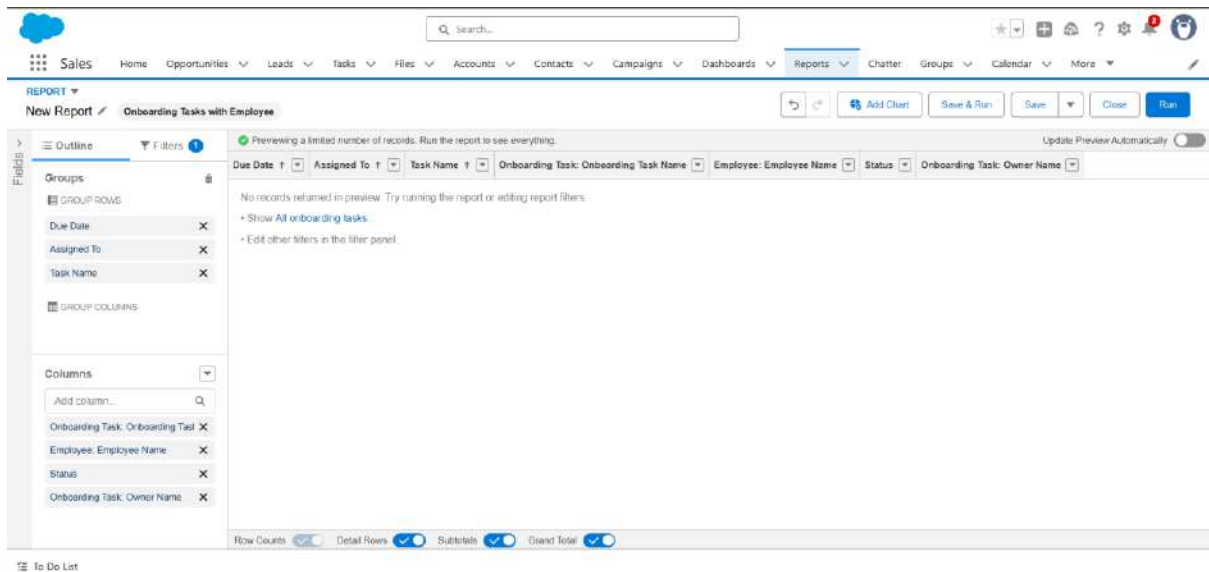
**2. Dashboards Implementation**

**Purpose:** Provide visual insights for HR, IT, and leadership in real-time.

**Steps:**

1. **Create Dashboards by Role:**

**HR Dashboard:**

- o Metric components: % Onboarding Completion, Tasks Completed vs Pending.
- o Charts: Department-wise onboarding progress.

**IT Dashboard:**

- o Metric components: Assets allocated, unreturned, or lost.
- o Charts: Asset utilization trends, high-value asset approvals pending.

**Manager Dashboard:**

- o Metrics: Pending approvals, onboarding efficiency.
- o Charts: Asset allocation cost by department, onboarding trends.

2. **Dynamic Dashboards:**

- o Set dashboards to **run as logged-in user** for role-specific visibility.
- o Managers see only their team's data; HR sees all employees.

3. **Components:**

- o Pie Charts → Asset allocation by type.
- o Bar Charts → Onboarding tasks completed per department.
- o Metrics → High-value assets pending approval.
- o Tables → List of employees with incomplete onboarding tasks.
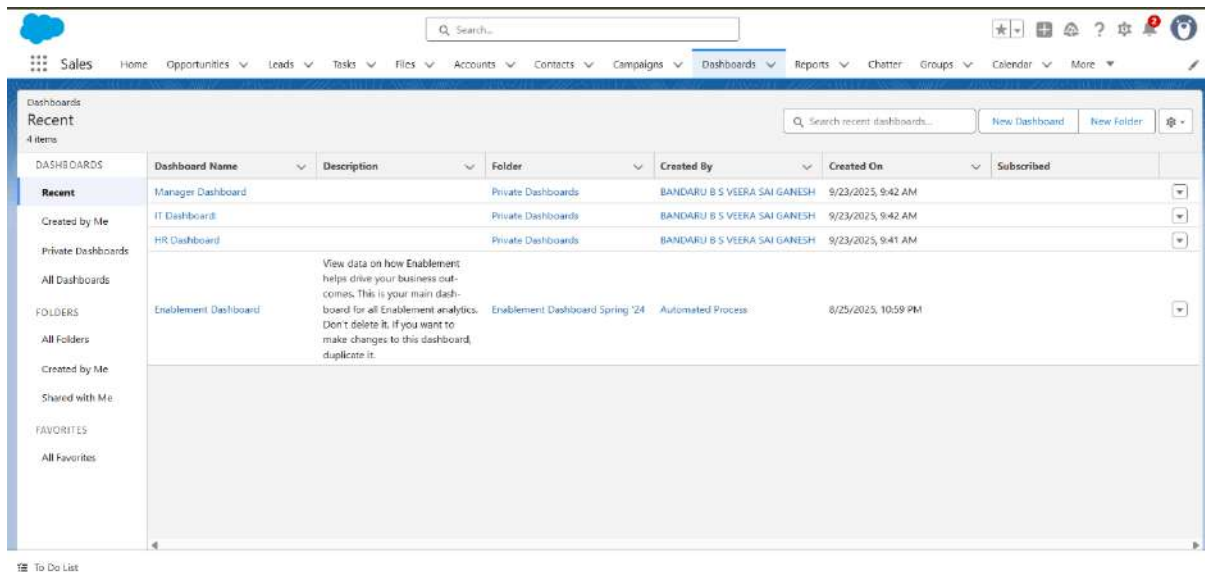
## 3. Security Review & Access Controls

**Objective:** Protect sensitive employee and asset data while allowing appropriate access.

1. **Profiles & Roles:**

   o **HR Manager Profile:** Full access to Employee & Onboarding records.

   o **IT Admin Profile:** Full access to Asset records; read-only access to employee info.

   o **Employee Profile:** View own onboarding tasks only.

   o **Manager Profile:** View approval requests and dashboards for their team.

2. **Field-Level Security:**

   o Hide sensitive fields (e.g., salary, bank details) from non-HR profiles.

   o Make asset cost read-only for employees.

3. **Sharing Rules & OWD:**

   o **OWD:** Set Employee and Asset objects to Private.

   o **Sharing Rules:** HR and IT have full access; Managers have team-based access.

4. **Session & Login Settings:**

   o Define login IP ranges and session timeouts for security compliance.

   o Enable MFA for all admin users.

5. **Audit Trail:**

   o Enable **Setup Audit Trail** to track configuration changes.

   o Monitor login history and report export activity for compliance.

**Phase 9 Outcome**

- **Reports:** Real-time insights on onboarding, asset allocation, and approvals.

- **Dashboards:** Visual, role-specific metrics for decision-making.

- **Security:** Controlled access ensures compliance and protection of sensitive information.

- **Management:** HR, IT, and leadership have actionable visibility for efficient operations.