

SkillSync – Phase 9: Reporting, Dashboards & Security Review

Project Title: SkillSync- Reporting, Dashboards & Security Review

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Prepared By: SHARANYA LAKSHMI S N

Reporting & Analytics:

- This report type connects Employees with their related Engagement Logs, enabling combined reporting on both objects.
- It allows analysis of employee details alongside their engagement activities for deeper performance insights.
- By linking related records, the report type supports customized reporting tailored to SkillSync's tracking needs.

The screenshot shows the Salesforce Setup interface for a custom report type. The left sidebar contains a search bar with 'reports' and a navigation menu with 'Feature Settings', 'Analytics', and 'Reports & Dashboards'. The main content area displays the configuration for a report type named 'Employees'. It includes a 'Details' section with fields like Display Label, API Name, Description, Created By, Store in Category, Deployment Status, and Modified By. Below this is a 'Fields' table showing the source objects and included fields. To the right is an 'Object Relationships' section with a Venn diagram illustrating the relationship between 'Employees (A)' and 'Engagement Logs (B)'.

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type

Details

Display Label: Employees
API Name: Employees
Description: SkillSyncReports
Created By: SANKU NARAYANA SWAMI GARI SHARANYA LAKSHMI, 25/09/2025, 12:24 pm
Store in Category: other
Deployment Status: Deployed
Modified By: SANKU NARAYANA SWAMI GARI SHARANYA LAKSHMI, 25/09/2025, 12:24 pm

Fields

Source Object	Included Fields
Employees	17
Engagement Logs	16

Object Relationships

Employees (A)
with at least one related record from Engagement Logs (B)

The diagram shows two overlapping circles, A and B, representing the relationship between Employees and Engagement Logs. Below the diagram is a small table with columns A and B, showing the combined data.

Report and Dashboard Settings:

- This setup screen defines the user interface preferences for reports and dashboards in Salesforce.

- It controls options like editing, exporting, scheduling, and viewing reports in the Lightning Experience.
- By enabling these settings, SkillSync ensures users have a flexible and interactive reporting environment.

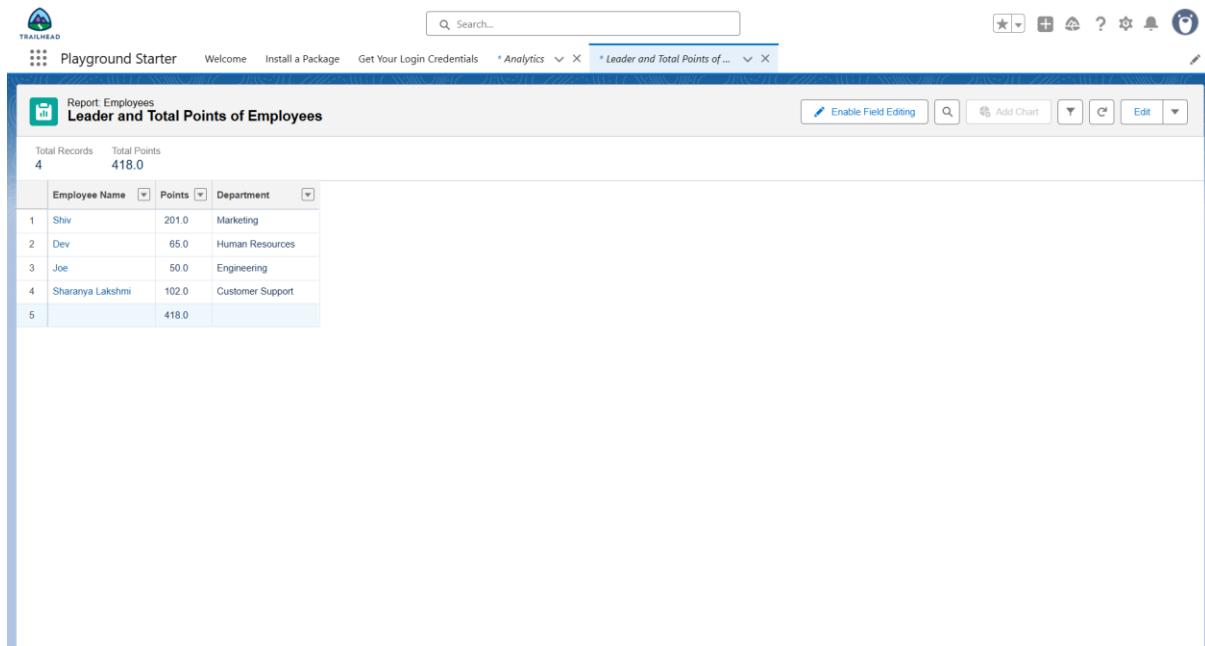
The screenshot shows the 'Reports and Dashboards Settings' page in Salesforce Setup. The left sidebar shows the navigation menu with 'Reports and Dashboards Settings' selected. The main content area is titled 'Report and Dashboard User Interface Settings' and includes a description: 'Modify the behavior of the user interface for report and dashboard pages using the following settings.' The settings are organized into sections: 'User Interface' (with checkboxes for floating report headers, dashboard finder, XLS export, inline editing, email addresses, CDN, and custom report type setup page), 'Confidential Information Disclaimer Settings' (with checkboxes for excluding disclaimers from reports and printables), 'Chatter Options' (with a checkbox for dashboard component snapshots), and 'Unified Analytics Home' (with checkboxes for showing preview thumbnails and enabling the unified experience). 'Save' and 'Cancel' buttons are at the bottom.

The screenshot shows the 'Reports' page in Salesforce. The left sidebar shows the navigation menu with 'Reports' selected. The main content area is titled 'All Reports' and shows a list of 9 items. The table has columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The reports are categorized into 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'. The 'All Reports' section is currently selected, showing a list of reports including 'Copy of Leaderboard - Top Employees', 'Leader and Total Points of Employees', 'Sample Flow Report: Screen Flows', 'Sample Report: Orchestration Run Logs', 'Sample Report: Orchestration Runs', 'Sample Report: Orchestration Stage Runs', 'Sample Report: Orchestration Step Runs', and 'Sample Report: Orchestration Work Items'.

Leader and Total Points of Employs:

- This report displays the Employee leaderboard, showing individual employees, their accumulated points, and department association.
- It provides a clear view of overall performance, highlighting both individual contributions and the total points earned by all employees.

- Such insights help managers track progress, identify top performers, and encourage healthy competition across departments.



The screenshot shows the Trailhead Playground Starter interface. At the top, there's a search bar and navigation links like 'Welcome', 'Install a Package', and 'Get Your Login Credentials'. The main area displays a report titled 'Report: Employees' with the subtitle 'Leader and Total Points of Employees'. Below the title, it shows 'Total Records: 4' and 'Total Points: 418.0'. A table lists the employees with their names, points, and departments.

	Employee Name	Points	Department
1	Shiv	201.0	Marketing
2	Dev	65.0	Human Resources
3	Joe	50.0	Engineering
4	Sharanya Lakshmi	102.0	Customer Support
5		418.0	

- **Sharing Settings**

- Employee records: Private.
- Mentor–Mentee data: Controlled by parent.
- Admin data: Read-only for non-admins.

- **Field Level Security**

Configured to ensure sensitive details like employee emails and feedback notes are only visible to authorized profiles.

- **Session Settings & Login IP Ranges**

Set up stricter login controls for Admin profiles to ensure only secure IP ranges and session policies apply to system administrators.

- **Audit Trail**

Enabled to track configuration changes, user activity, and system modifications for compliance and accountability.