

# Phase 9: Reporting, Dashboards & Security Review

**Goal:** Monitor leave activity and secure employee data.

## 1. Reports

- Leave Applications by Status (Submitted, Approved, Rejected)
- Leave Applications by Employee (to see how many leaves each employee applied for)

Report: Leave Applications  
**Leave Applications by Status**

Total Records: 4

Status	Employee	Leave Application: Leave Application Name	Leave Application: ID	Start Date	End Date
Submitted (1)	SHASHANK GUPTA (1)	test leave	a03gL00000CfWQ2	9/20/2025	9/22/2025
	Subtotal				
Approved (2)	SHASHANK GUPTA (2)	virat	a03gL00000BuMdp	9/22/2025	9/25/2025
	chutti	a03gL00000BuEZp	9/13/2025	9/15/2025	
	Subtotal				
Rejected (1)	SHASHANK GUPTA (1)	test	a03gL00000BuCeT	9/12/2025	9/15/2025
	Subtotal				
Total (4)					

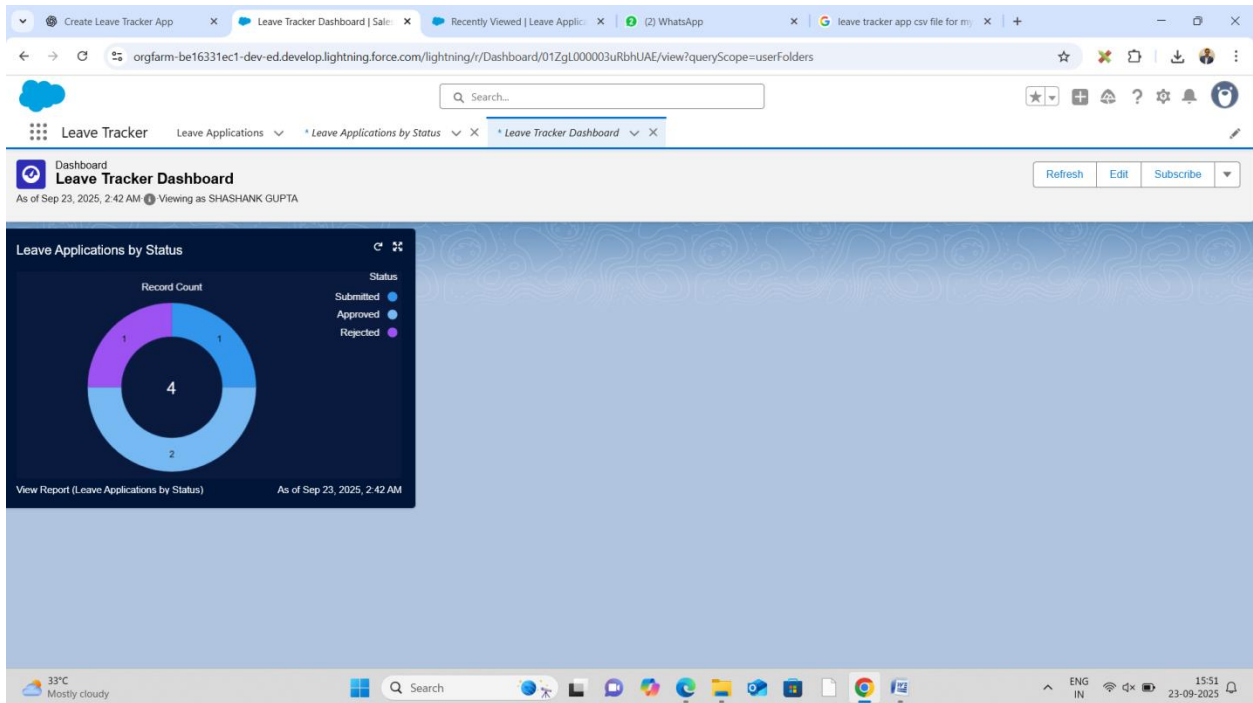
Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

## 2. Report Types

- Custom report: Leave Application + Employee

## 3. Dashboards

- Leave Status Dashboard (shows pending, approved, rejected leaves)
- Employee Leave Summary Dashboard (tracks leaves per employee)



#### 4. Dynamic Dashboards

- Each Manager sees only leave requests for their team

#### 5. Sharing Settings

- Leave Applications private to employees and managers
- Employee data visible only to HR/Admin

Setup Home Object Manager

Search Setup

sharing

Security

- Guest User Sharing Rule Access Report
- Sharing Settings

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

SETUP  
**Sharing Settings**

Help for this Page

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: **Leave Application**

[Disable External Sharing Model](#)

**Default Sharing Settings** [Edit](#)

**Organization-Wide Defaults** [Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Leave Application	Public Read/Write	Private	<input checked="" type="checkbox"/>

**Other Settings** [Other Settings Help](#)

Manager Groups ☐ [?](#)

Secure guest user record access ☒ [?](#)

Require permission to view record names in lookup fields ☐ [?](#)

**Sharing Rules**

**Leave Application Sharing Rules** [New](#) [Recalculate](#) [Leave Application Sharing Rules Help](#)

## 6. Field Level Security

- Hide sensitive fields like Reason or Employee ID from non-admin users

## 7. Session Settings

- Timeout after 30 minutes of inactivity

## 8. Login IP Ranges

- Restrict access to the org from office network or trusted IPs

## 9. Audit Trail

- Track who submitted, approved, or rejected leave requests

The screenshot displays the Salesforce Setup Audit Trail interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'View Setup Audit Trail' and includes a search bar and a 'Help for this Page' link. Below the title, a message states: '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).' The audit trail is presented as a table with the following columns: Date, User, Source Namespace Prefix, Action, Section, and Delegate User. The table lists 12 entries, including actions like duplicating rules, creating new rules, and changing user roles.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/23/2025, 3:13:40 AM PDT	shashankg14725445@agentforce.com		For duplicate rule Leave Application Duplicate Rule, changed evaluation criteria.	Duplicate Rule	
9/23/2025, 3:13:40 AM PDT	shashankg14725445@agentforce.com		For duplicate rule Leave Application Duplicate Rule, changed matching rules.	Duplicate Rule	
9/23/2025, 3:13:40 AM PDT	shashankg14725445@agentforce.com		Created new 01gl0000026s0r duplicate rule "Leave Application Duplicate Rule". Set "Record-Level Security" to "Enforce sharing rules"	Duplicate Rule	
9/23/2025, 2:59:30 AM PDT	shashankg14725445@agentforce.com		For matching rule Leave Application Match Rule, added matching criteria where matching method is Exact, the field is Leave_Type and match blank fields is "Does Not Match If Null"	Matching Rule	
9/23/2025, 2:59:30 AM PDT	shashankg14725445@agentforce.com		For matching rule Leave Application Match Rule, added matching criteria where matching method is Exact, the field is Name and match blank fields is "Does Not Match If Null"	Matching Rule	
9/23/2025, 2:59:30 AM PDT	shashankg14725445@agentforce.com		For matching rule Leave Application Match Rule, matching engine set to Exact Match Engine.	Matching Rule	
9/23/2025, 2:59:30 AM PDT	shashankg14725445@agentforce.com		Created new Leave Application matching rule Leave Application Match Rule	Matching Rule	
9/23/2025, 2:27:59 AM PDT	salesforce.com, inc.		Max number of streaming topics		
9/22/2025, 3:51:33 AM PDT	shashankg14725445@agentforce.com		Changed role for user SHASHANK GUPTA from <None Specified> to Manager	Manage Users	
9/22/2025, 3:51:33 AM PDT	shashankg14725445@agentforce.com		For user SHASHANK GUPTA, changed Data.com Monthly Addition Limit from null to 300		
9/22/2025, 3:50:37 AM PDT	shashankg14725445@agentforce.com		Created new role Employee	Manage Users	

Create Leave Tracker App | Leave Tracker Dashboard | View Setup Audit Trail | Recently Viewed | Leave A | (2) WhatsApp | leave tracker app csv file |

orgfarm-be16331ec1-dev-ed.develop.lightning.force.com/lightning/setup/SecurityEvents/home

Setup

Home | Object Manager

audit

Security

View Setup Audit Trail

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

VIEW SETUP

View Setup Audit Trail

Time PDT	Who	What	Where
9/23/2025, 2:59:30 AM PDT	shashankg14725445@agentforce.com	Created new Leave Application matching rule Leave Application Match Rule	Matching Rule
9/23/2025, 2:27:59 AM PDT	salesforce.com, inc.	Max number of streaming topics	
9/22/2025, 3:51:33 AM PDT	shashankg14725445@agentforce.com	Changed role for user SHASHANK GUPTA from <None Specified> to Manager	Manage Users
9/22/2025, 3:51:33 AM PDT	shashankg14725445@agentforce.com	For user SHASHANK GUPTA, changed Data.com Monthly Addition Limit from null to 300	
9/22/2025, 3:50:37 AM PDT	shashankg14725445@agentforce.com	Created new role Employee	Manage Users
9/22/2025, 3:50:04 AM PDT	shashankg14725445@agentforce.com	Created new role Manager	Manage Users
9/22/2025, 3:48:25 AM PDT	shashankg14725445@agentforce.com	Created new role HR	Manage Users
9/22/2025, 3:24:51 AM PDT	shashankg14725445@agentforce.com	Changed description of holiday Independence Day to National holiday	Holidays
9/22/2025, 3:24:01 AM PDT	shashankg14725445@agentforce.com	Created holiday Christmas Day	Holidays
9/22/2025, 3:23:36 AM PDT	shashankg14725445@agentforce.com	Created holiday Diwali	Holidays
9/22/2025, 3:23:00 AM PDT	shashankg14725445@agentforce.com	Created holiday Independence Day	Holidays
9/22/2025, 3:22:38 AM PDT	shashankg14725445@agentforce.com	Created holiday Republic Day	Holidays
9/22/2025, 3:22:02 AM PDT	shashankg14725445@agentforce.com	Created holiday New Year's Day	Holidays
9/22/2025, 3:15:06 AM PDT	shashankg14725445@agentforce.com	Changed permission set Leave Reports Access: Leave Application object permissions were changed from No Access to Read, Create, Edit	Manage Users

Download setup.audit.trail for last six months (Excel csv file)

33°C Mostly cloudy

Search

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