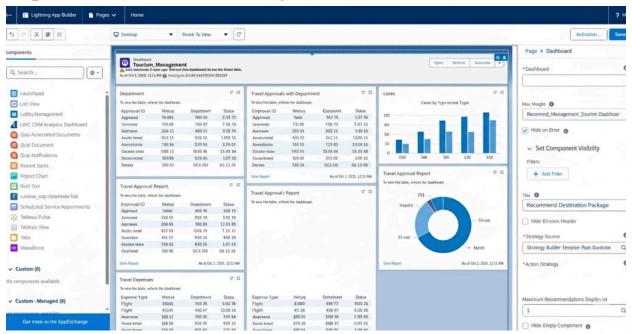
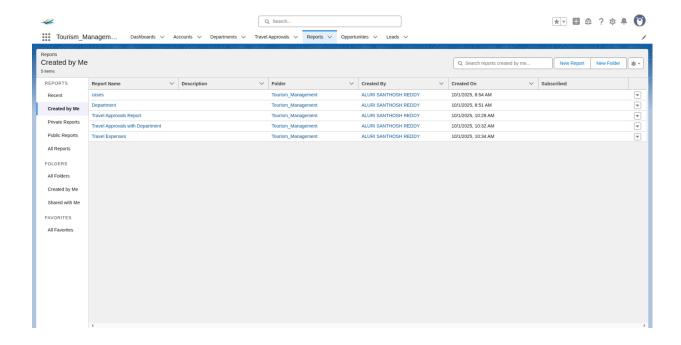
Phase 9: Reporting, Dashboards & Security Review

Reports (Tabular, Summary, Matrix, Joined)



Report Types



A **custom report type** was developed to meet specific analysis needs. This report allows for detailed views of data related to **Departments and their associated Travel Approvers**, enabling targeted insights into the approval workflow.

Dashboards

Two primary dashboards were created to provide key performance indicators at a glance:

- 1. A component was built to visualize the **number of travel bookings** associated with each department, helping to track travel volume and demand across the organization.
- 2. A separate dashboard was created for **analyzing the prices of various trips**, allowing for budget monitoring and cost analysis.

Dynamic Dashboards

Dynamic Dashboards were configured to provide a personalized view of the data for different user groups. This allows members of the **approval teams, support teams, and departments** to see dashboard components that reflect the specific travel booking data they have permission to access, all from a single, unified dashboard.

Sharing Settings

To ensure data confidentiality, record-level **sharing rules** were configured. These rules guarantee that only authorized users can view or edit sensitive records, such as **Department details**, **Customer information**, **and specific Travel details**.

Field-Level Security (FLS)

Access to highly sensitive information within records was restricted using **Field-Level Security**. This prevents unauthorized users from viewing or editing specific fields, such as **customer and employee personal details**, even if they have access to the record itself.

Session Settings

To protect the Salesforce org from unauthorized access on unattended devices, **session security settings** were applied. This includes configuring **session timeout** periods that automatically log out inactive users, enhancing the overall security posture.

Login IP Ranges

To add a critical layer of network security, **Login IP Ranges** were established. This feature restricts access to the Salesforce org, permitting logins only from a trusted list of specific IP addresses. This effectively **prevents unauthorized access** from external or unknown networks.

Audit Trail

The **Setup Audit Trail** was enabled to track all administrative and configuration changes made within the Salesforce org. This provides a comprehensive log of modifications, ensuring **accountability** and helping to troubleshoot any issues related to system changes in the travel booking application.