

Project Title: Employee Wellness & Productivity Tracker

Phase 9 : Reporting , Dashboards & Security Review

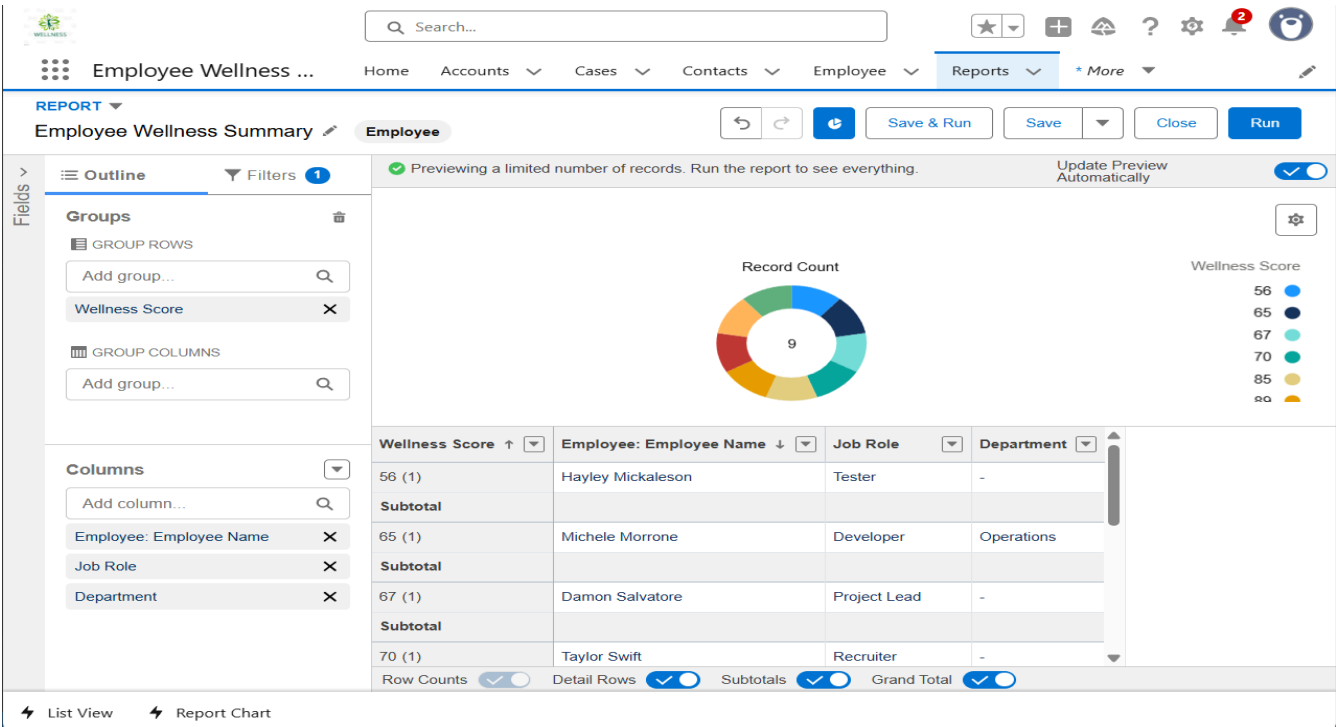
REPORTS

Purpose:

Reports allow HR and managers to track employee wellness, productivity, and activities. They summarize data for decision-making and highlight trends or areas needing attention.

Use Case in Project:

- Identify employees with low wellness scores
- Compare wellness trends across departments
- Track productivity tasks and participation in wellness programs



REPORT TYPES

Purpose: Combine employee data with wellness activities to create detailed reports.

Use Case in Project:

- Track wellness participation by employee or department
- Monitor scores and feedback for productivity and wellness activities

Steps:

1. Setup → Report Types → New Custom Report Type
2. Select **Primary Object** → Employee
3. Fill in **Display Label, API Name, Description, Category**
4. Set **Status** → Deployed
5. Select fields to include → Save layout

Details

Display Label

Employee Wellness Report

API Name

Employee_Wellness_Report

Description

Report type combining employee details with wellness activity records for tracking wellness scores and participation

Created By

Ayushi Bhanotra, 9/26/25, 6:06 PM

Store in Cate...

employee

Deployment ...

Deployed

Modified By

Ayushi Bhanotra, 9/26/25, 6:10 PM

Fields

Source Object	Included Fields
Employee	6

Object Relationships

Employee (A)

```
graph TD; A((A)) --> B[Table Icon];
```

DASHBOARDS

Purpose:

Dashboards provide a visual summary of employee wellness, productivity, and activities. They help HR and managers quickly track performance, participation, and trends.

Use Case in Project:

- Monitor average wellness scores across departments
- Identify employees with low wellness scores
- Track participation in wellness activities



PROFILES

Purpose:

Profiles define **what a user can do** in Salesforce, including access to objects, fields, tabs, apps, and permissions.

Use Case in Project:

- HR users can create and update employee records
- Managers can view dashboards and wellness reports
- Employees can update their own wellness activities

ROLES

Purpose:

Roles define **what data a user can see** based on hierarchy.

Use Case in Project:

- HR Manager role can see all employee records
- Department Manager role sees only employees in their department
- Employees see only their own records

USERS

Purpose:

Users are individuals who can log in to Salesforce with assigned profiles and roles.

Use Case in Project:

- Create users for HR, managers, and employees
- Assign them profiles and roles to control access and visibility

All Users

[Help for this Page](#)

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

New User Reset Password(s) Add Multiple Users						
<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Airy, Jasmine	jairy	jasmine456@gmail.com	Wellness Coach	✓	Wellness Coach Profile
<input type="checkbox"/> Edit	Bhanotra, Ayushi	ayu	ayushibhanotra04351@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dfj000008jbdneae.sjoenqdlb4vl@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit Login	EPIC_OrgFarm	OEPIC	epic.77f29af235c8@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit Login	Huang, Ana	ahuan	anahuang56@gmail.com	Employee	✓	Employee Profile
<input type="checkbox"/> Edit Login	Martinez, Celia	cmart	celia789@gmail.com	HR_Manager	✓	HR Manager Profile
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dfj000008jbdneae.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dfj000008jbdneae.com		✓	Analytics Cloud Security User
New User Reset Password(s) Add Multiple Users						

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

PERMISSION SETS

Purpose:

Permission Sets grant **additional permissions** to users **without changing their profile**.

Useful when a user needs temporary or specific access beyond their profile.

Use Case in Project:

- HR staff can edit wellness scores even if their profile is read-only for Employee__c
- Managers can access special dashboards or reports

Permission Set Video Tutorial | Help for this Page ?

Employee Wellness App Access

Find Settings... | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview

Description	Grants users access to the Employee Wellness application, enabling them to view and update wellness records, participate in wellness programs, and track personal wellness progress. Ensures proper access while maintaining data security	API Name	Employee_Wellness_App_Access
License		Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By	Ayushi Rhanotra, 9/24/2025, 6:16 AM
Permission Set Groups Added To	0	Last Modified By	Ayushi Rhanotra, 9/24/2025, 6:25 AM

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

ORGANIZATION-WIDE DEFAULTS (OWD)

Purpose:

OWD defines **default access** for records in Salesforce.

- Private → Users see only records they own
- Public Read Only → Users can view all records
- Public Read/Write → Users can view and edit all records

Use Case in Project:

- Employee__c → Private (employees can only see their own records)
- Employee Wellness Activity__c → Private (managers see only their employees)

SHARING RULES

Sharing Rules **grant record access beyond OWD** based on ownership or criteria.

Use Case in Project:

- HR can view all Employee records
- Department Manager can view only employees in their department

Employee Sharing Rules			
		New Recalculate	Employee Sharing Rules Help ?
Action	Criteria	Shared With	Access Level
Edit Del	Employee: Job Role EQUALS HR	Role: HR_Manager	Read/Write

Employee Activity Sharing Rules			
		New Recalculate	Employee Activity Sharing Rules Help ?
No sharing rules specified.			

Employee Wellness Sharing Rules			
		New Recalculate	Employee Wellness Sharing Rules Help ?
Action	Criteria	Shared With	Access Level
Edit Del	Employee Wellness: Assigned Coach EQUALS Current User	Role: Wellness Coach	Read/Write
Edit Del	Owner in Role: HR_Manager	Role: HR_Manager	Read/Write

FIELD LEVEL SECURITY

Purpose:

- Control **which users can view or edit** specific fields in Salesforce.
- Ensures sensitive information is restricted to authorized users.

Use Case in Project:

- Only HR can **edit Wellness Score**.
- Employees can **view their own scores** but not edit them.

Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Einstein Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
HR Manager Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - API Only Integrations	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SESSION SETTINGS & LOGIN IP RANGES

Purpose:

- Secure Salesforce access by controlling session timeouts and login locations.

Use Case in Project:

- Ensure employees log in only from company network
- Set session timeout to protect sensitive data

SESSION SETTINGS



SETUP

Session Settings

Session Settings

Set the session security and session expiration timeout for your organization.

Session Timeout

Timeout Value

30 minutes ▼

☐ Disable session timeout warning popup

☒ Force logout on session timeout

AUDIT TRAIL

Purpose:

- Track **changes made in setup and configuration.**
- Helps in auditing who modified objects, fields, profiles, or reports.

Use Case in Project:

- Monitor modifications to Employee object, wellness fields, and reports

Explorer SetupAuditTrail1758892841409.csv								
	A	B	C	D	E	F	G	H
1	Date	User	Source Name Action		Section	Delegate User		
2	9/26/2025, 6:14:16 AM PDT	ayushibhanotra04351@agentforce.com	Changed Session Timeout Value from 120 to 30 minutes		Session Settings			
3	9/26/2025, 6:14:16 AM PDT	ayushibhanotra04351@agentforce.com	Session Security Level for Multi-Factor Authentication was set to High Assurance		Session Settings			
4	9/26/2025, 6:14:16 AM PDT	ayushibhanotra04351@agentforce.com	Session Security Level for Passwordless Login was set to Standard		Session Settings			
5	9/26/2025, 6:14:16 AM PDT	ayushibhanotra04351@agentforce.com	Session Security Level for Lightning Login was set to Standard		Session Settings			
6	9/26/2025, 6:14:16 AM PDT	ayushibhanotra04351@agentforce.com	Session Security Level for Activation was set to Standard		Session Settings			
7	9/26/2025, 6:14:16 AM PDT	ayushibhanotra04351@agentforce.com	Session Security Level for Delegated Authentication was set to Standard		Session Settings			
8	9/26/2025, 6:14:16 AM PDT	ayushibhanotra04351@agentforce.com	Session Security Level for Username Password was set to Standard		Session Settings			
9	9/26/2025, 6:02:03 AM PDT	ayushibhanotra04351@agentforce.com	Initiated Criteria Rule: Employee recalculation: HR Access to All Employees		Sharing Rules			
10	9/26/2025, 6:02:03 AM PDT	ayushibhanotra04351@agentforce.com	Created Employee Criteria-Based Sharing Rule HR Access to All Employees		Sharing Rules			
11	9/26/2025, 6:02:03 AM PDT	ayushibhanotra04351@agentforce.com	Completed Criteria Rule: Employee recalculation: HR Access to All Employees		Sharing Rules			
12	9/26/2025, 5:18:15 AM PDT	ayushibhanotra04351@agentforce.com	Added standard button override on Employee: View (Lightning Page null)		Custom Objects			
13	9/26/2025, 5:18:15 AM PDT	ayushibhanotra04351@agentforce.com	Added standard button override on Employee: View (Lightning Page null)		Custom Objects			
14	9/26/2025, 5:18:02 AM PDT	ayushibhanotra04351@agentforce.com	Changed Lightning Page: Employee Record Page		Lightning Pages			
15	9/26/2025, 5:17:57 AM PDT	ayushibhanotra04351@agentforce.com	Changed Lightning Page: Employee Record Page		Lightning Pages			
16	9/26/2025, 5:17:19 AM PDT	ayushibhanotra04351@agentforce.com	Changed Lightning Page: Employee Wellness Home		Lightning Pages			
17	9/26/2025, 5:16:22 AM PDT	ayushibhanotra04351@agentforce.com	Changed Lightning Page: Employee Wellness Dashboard		Lightning Pages			
18	9/26/2025, 5:14:13 AM PDT	ayushibhanotra04351@agentforce.com	Changed Lightning Page: Employee Wellness Dashboard		Lightning Pages			
19	9/26/2025, 5:14:03 AM PDT	ayushibhanotra04351@agentforce.com	Changed Lightning Page: Employee Wellness Dashboard		Lightning Pages			
20	9/26/2025, 5:13:57 AM PDT	ayushibhanotra04351@agentforce.com	Changed Lightning Page: Employee Wellness Dashboard		Lightning Pages			
21	9/26/2025, 4:18:49 AM PDT	ayushibhanotra04351@agentforce.com	Changed wellnessScoreCard Lightning Web Component		Lightning Components			
22	9/26/2025, 4:18:37 AM PDT	ayushibhanotra04351@agentforce.com	Changed EmployeeController Apex Class code		Apex Class			
23	9/26/2025, 2:42:40 AM PDT	ayushibhanotra04351@agentforce.com	Requested an export		Data Export			
24	9/26/2025, 2:35:53 AM PDT	ayushibhanotra04351@agentforce.com	For the 01If000002pZH7 duplicate rule Employee Email Duplicate Rule, changed "Active" from		Duplicate Rule			
25	9/26/2025, 2:34:56 AM PDT	ayushibhanotra04351@agentforce.com	Employee matching rule, Employee Email Exact Match, activating by Ayushi Bhanotra		Matching Rule			
26	9/26/2025, 2:32:40 AM PDT	ayushibhanotra04351@agentforce.com	For matching rule Employee Email Exact Match, added matching criteria where matching met		Matching Rule			
27	9/26/2025, 2:32:40 AM PDT	ayushibhanotra04351@agentforce.com	For matching rule Employee Email Exact Match, matching engine set to Exact Match Engine.		Matching Rule			
28	9/26/2025, 2:32:40 AM PDT	ayushibhanotra04351@agentforce.com	Created new Employee matching rule Employee Email Exact Match		Matching Rule			
SetupAuditTrail1758892841409								