

Corporate IT Helpdesk System

Phase 9: Reporting, Dashboards & Security Review

Project: Corporate IT Helpdesk System

Purpose:

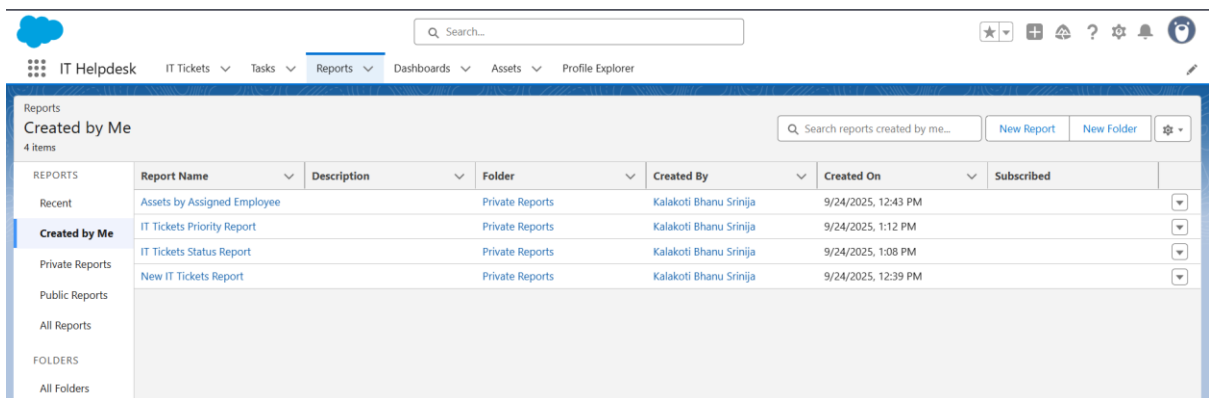
This phase focuses on providing business insights through analytics and demonstrating key security configurations. Custom Reports and a Dashboard were built to visualize IT support ticket data for management. Additionally, a security review was performed, focusing on Object Permissions and the Setup Audit Trail.

1. Reporting & Analytics

Goal: To provide IT managers with clear visibility into tickets, IT assets, and employee requests for faster decision-making and workload management.

A. Custom Reports

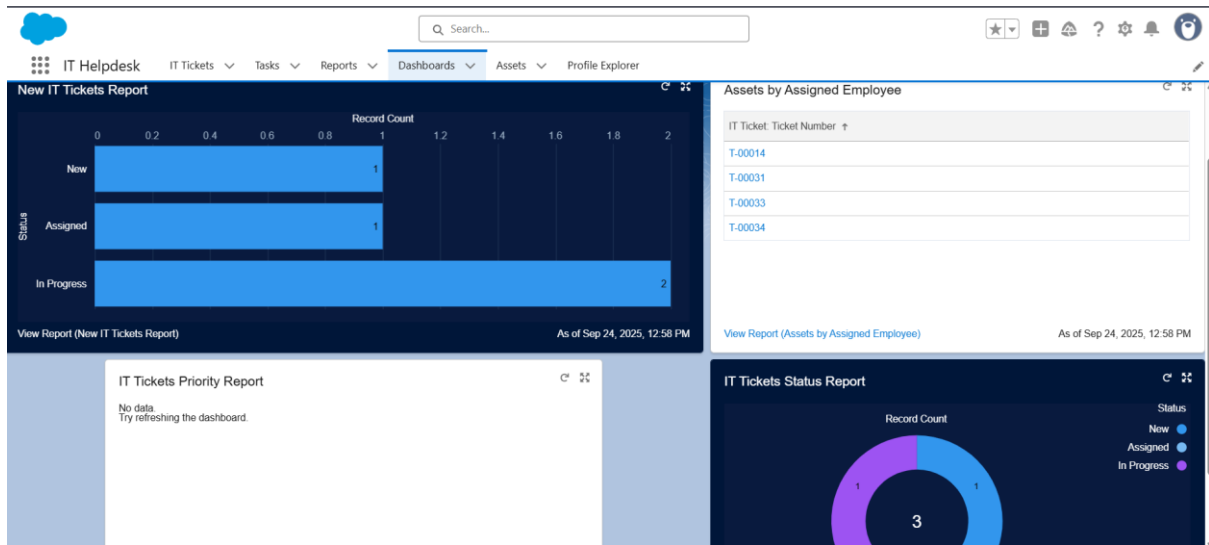
- Reports were created on IT_Ticket__c and Asset__c objects.
- Example reports:
 - Tickets by Status – grouped by “Open,” “In Progress,” and “Closed.”
 - Tickets by Priority – grouped by “High,” “Medium,” and “Low.”
 - Assets by Assigned User – showing which employee has which IT asset.
- Charts were added to these reports for quick visual insights.



B. Management Dashboard

- A central IT Helpdesk Dashboard was created.
- Components include:
 - Tickets by Status (bar chart)
 - Tickets by Priority (pie chart)

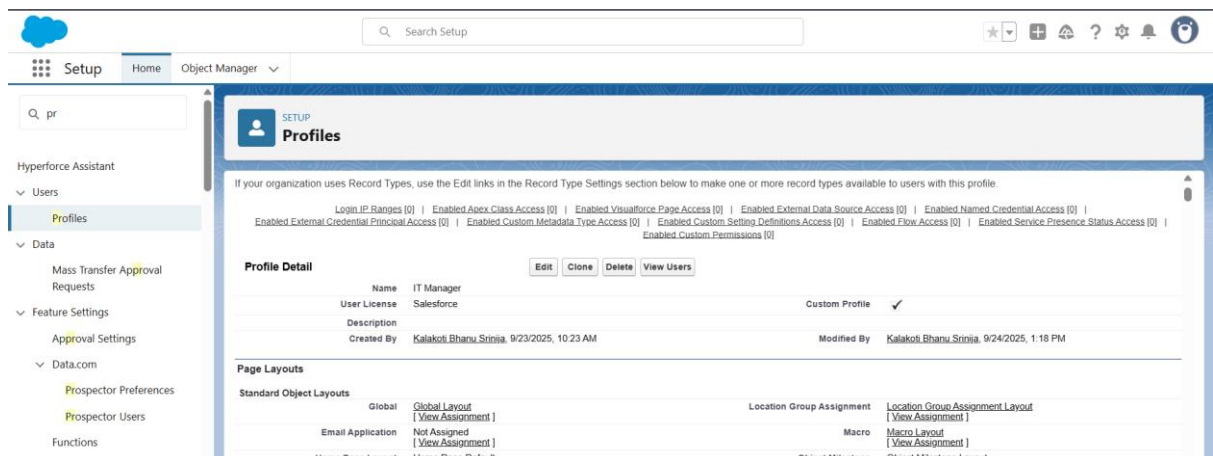
- Assets Assigned per Employee (table or chart)
- The dashboard allows managers to quickly analyze the team's workload and resource allocation.



2. Security Review

A. Object Permissions

- Profiles and permission sets were reviewed to ensure users have the correct access:
 - Read/Write on IT_Ticket__c for IT support team members
 - Read Only for employees submitting tickets
 - Read/Write on Asset__c for IT admins



- Ensures that users can only access records appropriate to their role.

B. Setup Audit Trail

- The Setup Audit Trail was reviewed to track all recent administrative changes.

- Provides accountability for configurations and helps troubleshoot any system issues.

View Setup Audit Trail

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).

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/24/2025, 12:34:47 PM PDT	bhanusrinjak146@agerforce.com		Changed Enable Reports setting for custom object IT Ticket from off to on	Custom Objects	
9/24/2025, 12:34:47 PM PDT	bhanusrinjak146@agerforce.com		Changed Track Activities setting for custom object IT Ticket from off to on	Custom Objects	
9/24/2025, 12:10:44 PM PDT	bhanusrinjak146@agerforce.com		Completed Criteria Rule: Asset recalculation: Imported Assets Visibility	Sharing Rules	
9/24/2025, 12:10:44 PM PDT	bhanusrinjak146@agerforce.com		Initiated Criteria Rule: Asset recalculation: Imported Assets Visibility	Sharing Rules	
9/24/2025, 12:10:44 PM PDT	bhanusrinjak146@agerforce.com		Created Asset Criteria-Based Sharing Rule Imported Assets Visibility	Sharing Rules	
9/24/2025, 12:07:40 PM PDT	bhanusrinjak146@agerforce.com		Finished Organization-Wide Defaults update	Sharing Defaults	
9/24/2025, 12:07:35 PM PDT	bhanusrinjak146@agerforce.com		Changed default external access for Asset from Private to Public Read/Write	Sharing Defaults	
9/24/2025, 12:07:12 PM PDT	bhanusrinjak146@agerforce.com		Started Organization-Wide Defaults update	Sharing Defaults	
9/24/2025, 12:07:12 PM PDT	bhanusrinjak146@agerforce.com		Started default external access update for Asset from Private to Public Read/Write	Sharing Defaults	

Conclusion

- Custom reports and the dashboard now provide real-time insights into IT tickets and asset management.
- Security review ensures controlled access to sensitive IT Helpdesk data.
- This phase demonstrates both business reporting capabilities and administrative control over the system.