

# **Phase 9: Reporting, Dashboards & Security Review**

## **1. Reports**

### **Use Case:**

The main goal was to monitor course completion, identify top-performing trainers, and understand employee engagement with new courses. These reports help management make data-driven decisions to improve corporate training effectiveness.

### **Implementation Details:**

#### **1. New Courses with Trainer Report**

- Displays a list of all newly added courses along with the trainer assigned.
- Helps administrators quickly view which trainers are conducting which courses.

#### **2. Completion (%) Report**

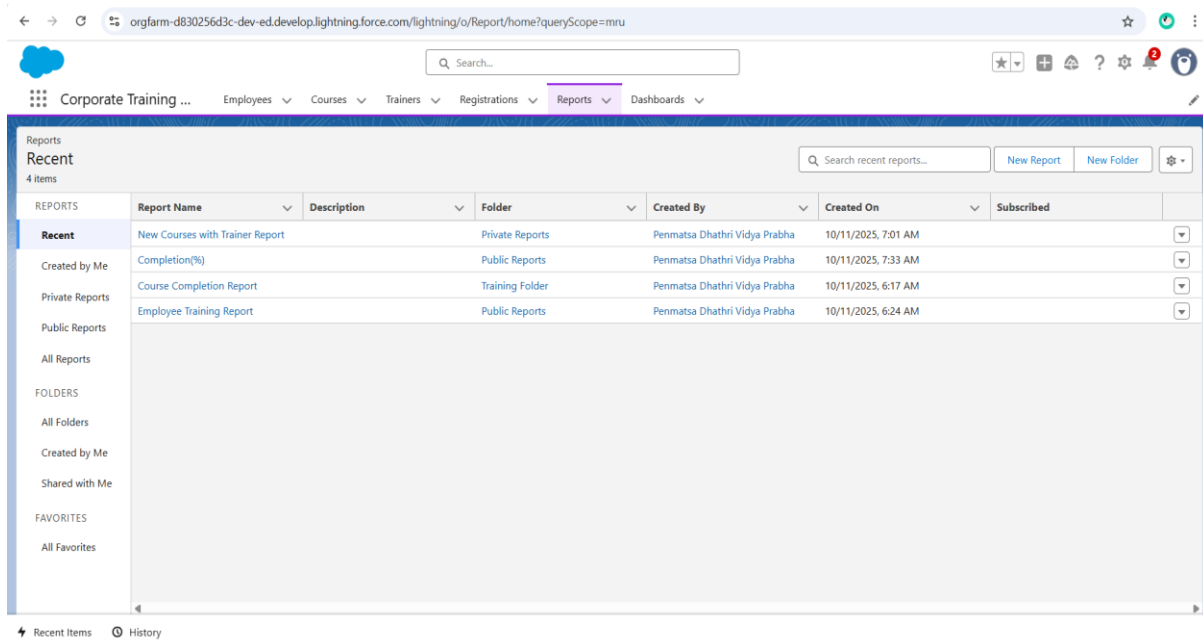
- Summarizes the average completion percentage across all courses.
- Grouped by department or employee to visualize overall learning progress.

#### **3. Course Completion Report**

- Cross-tabulates courses vs. departments.
- Shows how many employees in each department completed specific courses.

#### **4. Employee Training Report**

- Combines employee and course data to evaluate participation, completion, and feedback.
- Helps HR identify employees who need additional support or follow-up training.



## 2. Dashboards

### Use Case:

Dashboards provide a visual and interactive way to analyze training data such as employee progress, course performance, and completion rates. They help management quickly identify which courses are most effective and which employees need more training support.

### Implementation:

#### 1. Pie Chart:

- **Source Report:** *Completion (%) Report*
- **Purpose:** Displays the distribution of training completion percentages across all employees, showing how many have completed 100%, partially completed, or not started training.

#### 2. List View:

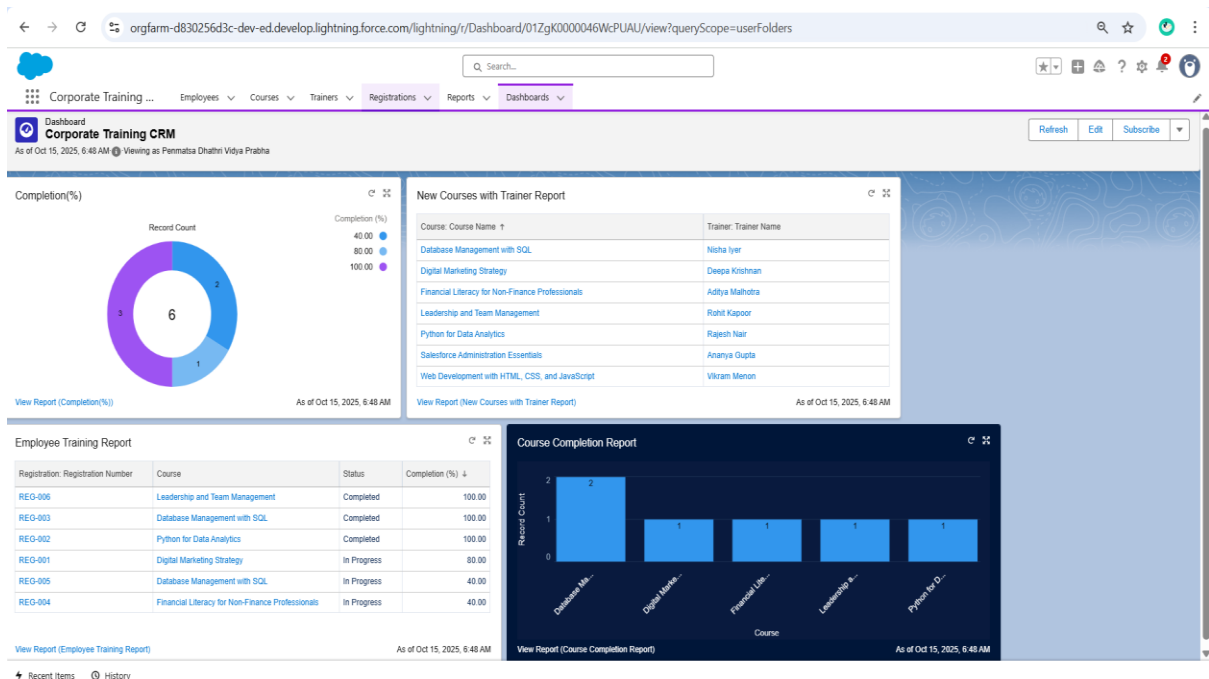
- **Source Report:** *New Courses with Trainer Report*
- **Purpose:** Lists all newly added courses along with the assigned trainer names for better tracking and trainer workload management.

#### 3. List View:

- **Source Report:** *Employee Training Report*
- **Purpose:** Provides a detailed list of employees, their registered courses, and completion status.

#### 4. Bar Chart:

- **Source Report:** *Course Completion Report*
- **Purpose:** Compares different courses and their average completion percentages, helping identify which courses are performing well and which need improvement.



### 3. Profiles, Roles & Users

#### Use Case:

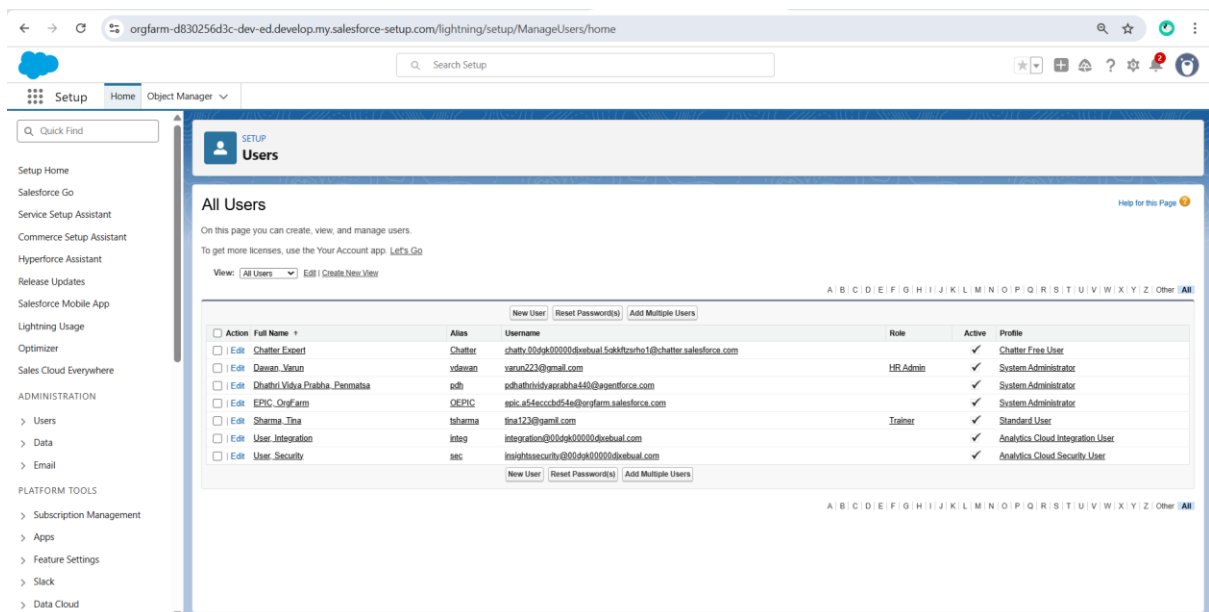
Profiles and Roles control access levels and data visibility across the system.

#### Implementation:

- **Profiles:**
  - HR Admin Profile – Full access to all objects.
  - Trainer Profile – Read/Edit access to Course and Registration, Read-Only to Employee.
- **Roles:**

- **Users:**

Each user has access suited to their responsibility, ensuring a secure data hierarchy.



## **Summary:**

- Created detailed to track employee progress, course effectiveness, and trainer performance.
- Developed an interactive dashboard using pie charts, bar charts, and list views for quick visualization of training data.
- Configured profiles, roles, and users to ensure secure access and role-based visibility of CRM data.
- These implementations provide comprehensive insights, enhance decision-making, and maintain data security within the Corporate Training CRM.