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

**🔹 1. Reports**

Reports are **tables of data** you can filter and group.

**Types:**

1. **Tabular Report** – Just rows (like Excel).  
   → Example: List of all Leave Requests.
2. **Summary Report** – Rows grouped.  
   → Example: Leave Requests grouped by Employee.
3. **Matrix Report** – Rows + Columns grouped.  
   → Example: Leave Requests by Employee (rows) and Status (columns).
4. **Joined Report** – Combine different report types.  
   → Example: Employee info + Leave Requests in one report.

**How to do in Developer Org:**

1. Go to **App Launcher → Reports → New Report**.
2. Select report type (e.g., Leave Requests).
3. Drag fields (Employee, Status, Start Date, End Date).
4. Apply filter (Status = Approved).
5. Click **Save & Run**.

**🔹 2. Report Types**

Report Types decide **which objects and fields** are available in your report.

**Steps:**

1. Setup → **Report Types → New Custom Report Type**.
2. Primary Object: Leave\_Request\_\_c.
3. Related Object: Employee\_\_c.
4. Save.  
   ✅ Now you can create reports showing both Employees and their Leave Requests.

**🔹 3. Dashboards**

Dashboards = **charts & visuals** made from reports.

**Steps:**

1. App Launcher → **Dashboards → New Dashboard**.
2. Add components (charts, tables, gauges).
3. Link each component to an existing report.

**Example Dashboard Components:**

* Pie Chart: Leave Requests by Status.
* Bar Chart: Leaves by Department.
* Gauge: % of Leave Balance Used.

**🔹 4. Dynamic Dashboards**

Dynamic dashboards show **different data depending on who views them**.

**Steps:**

1. Create a dashboard.
2. In “View Dashboard As,” select → **Run as Logged-in User**.  
   ✅ Manager sees their team’s data, HR sees all employees.

**🔹 5. Sharing Settings**

Controls **who can see what records**.

**Steps:**

1. Setup → **Sharing Settings**.
2. For Leave\_Request\_\_c:
   * OWD = **Private** (employees see only their requests).
   * Managers = Can see subordinates’ requests.
   * HR = Full access.

**🔹 6. Field Level Security (FLS)**

Controls **who can see/edit certain fields**.

**Steps:**

1. Setup → **Object Manager → Leave\_Request\_\_c → Fields**.
2. Open field → Click **Set Field-Level Security**.
   * Example: HR\_Comments\_\_c → only HR can see, employees cannot.

**🔹 7. Session Settings**

Protects login sessions.

**Steps:**

1. Setup → **Session Settings**.
2. Set **Timeout** (e.g., 2 hours).
3. Enable “Lock sessions to IP” for extra security.

**🔹 8. Login IP Ranges**

Restrict users by IP.

**Steps:**

1. Setup → **Profiles → Select Profile → Login IP Ranges**.
2. Add Allowed IP Range (e.g., Office Wi-Fi IP 103.25.xx.xx).

**🔹 9. Audit Trail**

Tracks **all setup changes** in your org.

**Steps:**

1. Setup → **View Setup Audit Trail**.
2. You’ll see → Who changed what, and when.