# PHASE - 9

#### 1. Reports

Purpose: Analyze and visualize Employee and Onboarding Task data.

Steps:

Go to App Launcher  $\rightarrow$  Reports  $\rightarrow$  New Report.

Select the Object.

Choose Report Format:

Tabular  $\rightarrow$  simple list of records.

Summary  $\rightarrow$  group records by a field.

Matrix  $\rightarrow$  group by rows and columns.

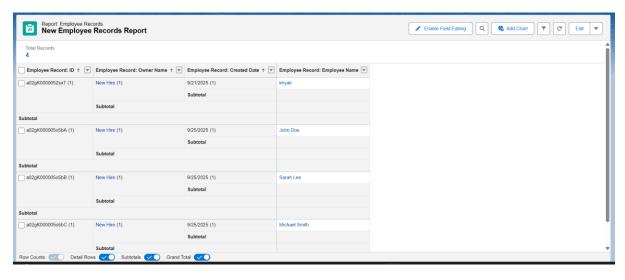
Joined  $\rightarrow$  combine multiple report types.

Drag fields into the report.

Apply filters to limit data.

Click Run.

Save the report with a name and folder.



# 2. Report Types

Purpose: Define objects and relationships for reporting.

Steps:

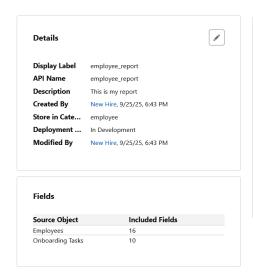
Go to Setup  $\rightarrow$  Report Types  $\rightarrow$  New Custom Report Type.

Select Primary Object.

Optionally, add a Related Object.

Set Deployment Status to Deployed.

Save.





#### 3. Dashboards

Purpose: Visual representation of reports.

Steps:

Go to App Launcher  $\rightarrow$  Dashboards  $\rightarrow$  New Dashboard.

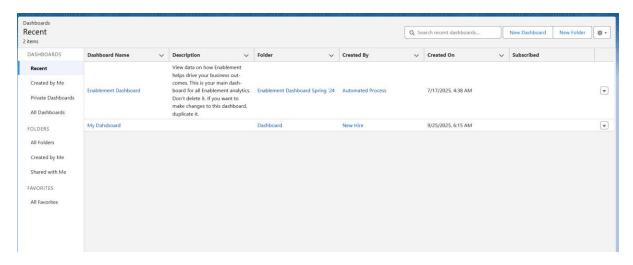
Enter Name and folder.

Click +Component, select a report as data source.

Select chart type.

Configure component properties.

Add multiple components if needed  $\rightarrow$  Save.



# 4. Dynamic Dashboards

Purpose: Show data according to logged-in user access.

Steps:

Edit an existing dashboard.

Enable "Run as logged-in user".

Save.

# 5. Field Level Security

Purpose: Control which fields are visible/editable for different profiles.

Steps:

Go to Setup  $\rightarrow$  Profiles  $\rightarrow$  Object Settings  $\rightarrow$  Fields & Relationships.

Set Visible or Read-Only for each field as needed.

Save.

#### 6. Session Settings

Purpose: Configure user session security.

Steps:

Go to Setup  $\rightarrow$  Session Settings.

Configure timeout, IP restrictions, and security policies.

Save.

# 7. Login IP Ranges

Purpose: Restrict login to trusted networks.

Steps:

Go to Setup  $\rightarrow$  Profiles  $\rightarrow$  Login IP Ranges.

Select a profile.

Add Start IP Address and End IP Address.

Save.

#### 6. Sharing Settings

Purpose: Control record visibility.

Steps:

Go to Setup  $\rightarrow$  Sharing Settings.

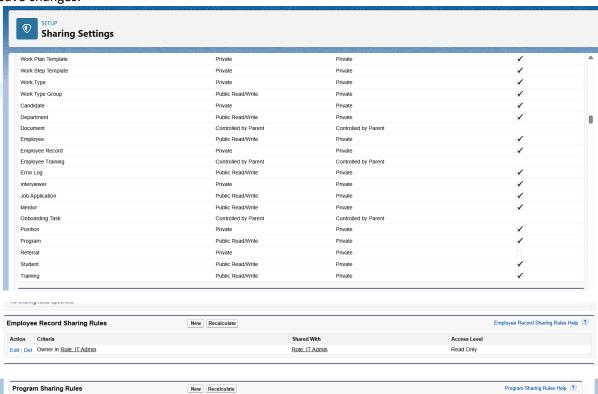
Review Org-Wide Defaults (OWD).

Adjust visibility as needed.

### Save changes.

Action Criteria

Edit | Del Program: Type EQUALS Campus Outreach



Read/Write