

PHASE - 9

1. Reports

Purpose: Analyze and visualize Employee and Onboarding Task data.

Steps:

Go to App Launcher → Reports → New Report.

Select the Object.

Choose Report Format:

Tabular → simple list of records.

Summary → group records by a field.

Matrix → group by rows and columns.

Joined → combine multiple report types.

Drag fields into the report.

Apply filters to limit data.

Click Run.

Save the report with a name and folder.

Report: Employee Records
New Employee Records Report

Enable Field Editing 🔍 Add Chart 📉 📄 Edit ▼

Total Records
4

Employee Record: ID	Employee Record: Owner Name	Employee Record: Created Date	Employee Record: Employee Name
<input type="checkbox"/> a02gK0000005Zsx7 (1)	New Hire (1)	9/21/2025 (1)	khyati
Subtotal		Subtotal	
Subtotal			
<input type="checkbox"/> a02gK0000005o5bA (1)	New Hire (1)	9/25/2025 (1)	John Doe
Subtotal		Subtotal	
Subtotal			
<input type="checkbox"/> a02gK0000005o5bB (1)	New Hire (1)	9/25/2025 (1)	Sarah Lee
Subtotal		Subtotal	
Subtotal			
<input type="checkbox"/> a02gK0000005o5bC (1)	New Hire (1)	9/25/2025 (1)	Michael Smith
Subtotal		Subtotal	
Subtotal			

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

2. Report Types

Purpose: Define objects and relationships for reporting.

Steps:

Go to Setup → Report Types → New Custom Report Type.

Select Primary Object.

Optionally, add a Related Object.

Set Deployment Status to Deployed.

Save.

Details

Display Label

employee_report

API Name

employee_report

Description

This is my report

Created By

New Hire, 9/25/25, 6:43 PM

Store in Cate...

employee

Deployment ...

In Development

Modified By

New Hire, 9/25/25, 6:43 PM

Fields

Source Object	Included Fields
Employees	16
Onboarding Tasks	10

Object Relationships

Employees (A)

with at least one related record from Onboarding Tasks (B)



3. Dashboards

Purpose: Visual representation of reports.

Steps:

Go to App Launcher → Dashboards → 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 → Save.

Dashboards							
Recent							
2 items							
DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed	
Recent							
Created by Me	Enablement Dashboard	View data on how Enablement helps drive your business outcomes. This is your main dashboard for all Enablement analytics. Don't delete it. If you want to make changes to this dashboard, duplicate it.	Enablement Dashboard Spring '24	Automated Process	7/17/2025, 4:38 AM		
Private Dashboards							
All Dashboards							
FOLDERS							
All Folders							
Created by Me							
Shared with Me							
FAVORITES							
All Favorites							
	My DASHBOARD		Dashboard	New Hire	9/25/2025, 6:15 AM		

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 → Profiles → Object Settings → 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 → Session Settings.

Configure timeout, IP restrictions, and security policies.

Save.

7. Login IP Ranges

Purpose: Restrict login to trusted networks.

Steps:

Go to Setup → Profiles → 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 → Sharing Settings.

Review Org-Wide Defaults (OWD).

Adjust visibility as needed.

Save changes.

SETUP

Sharing Settings

Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Candidate	Private	Private	✓
Department	Public Read/Write	Private	✓
Document	Controlled by Parent	Controlled by Parent	
Employee	Public Read/Write	Private	✓
Employee Record	Private	Private	✓
Employee Training	Controlled by Parent	Controlled by Parent	
Error Log	Public Read/Write	Private	✓
Interviewer	Private	Private	✓
Job Application	Public Read/Write	Private	✓
Mentor	Public Read/Write	Private	✓
Onboarding Task	Controlled by Parent	Controlled by Parent	
Position	Private	Private	✓
Program	Public Read/Write	Private	✓
Referral	Private	Private	<input type="checkbox"/>
Student	Public Read/Write	Private	✓
Training	Public Read/Write	Private	✓

Employee Record Sharing Rules

New

Recalculate

Employee Record Sharing Rules Help ?

Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role: IT Admin	Role: IT Admin	Read Only

Program Sharing Rules

New

Recalculate

Program Sharing Rules Help ?

Action	Criteria	Shared With	Access Level
Edit Del	Program: Type EQUALS Campus Outreach	Role: Recruiter	Read/Write