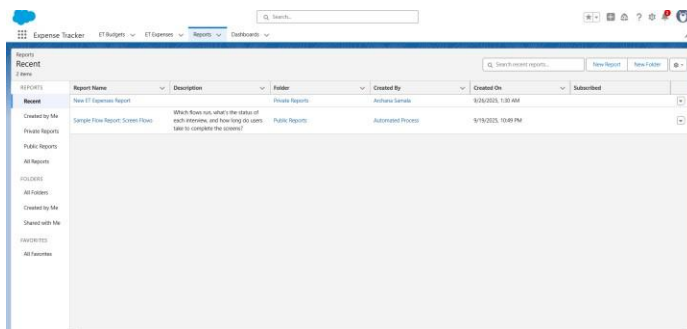


Reporting, Dashboards & Security Review

In this phase, I focused on creating reports and dashboards to visualize data, and reviewing security settings for the **Expense Tracker** project.

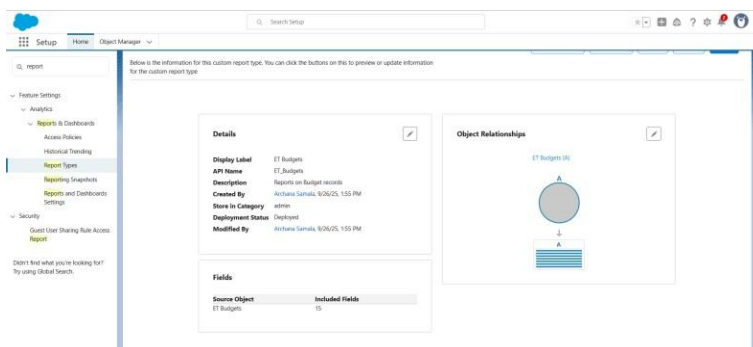
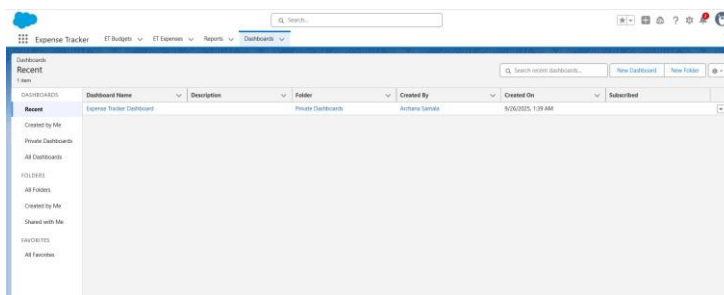
1. Creating Custom Report Types

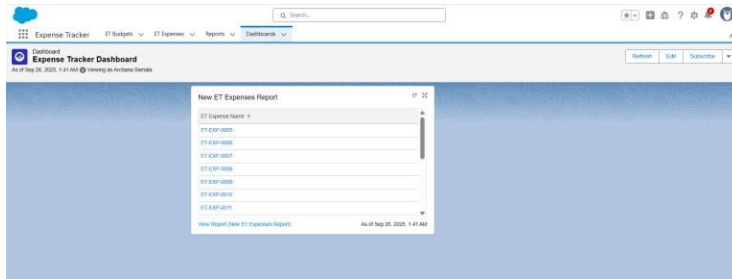
- Created a **Report Type: ET Budgets** with primary object ET_Budget__c.
- Created another **Report Type: ET Expenses** with primary object ET_Expense__c.
- These report types allow building reports specifically tailored to budgets and expenses.



2. Creating Dashboards

- Created a new **Dashboard Folder** named **Expense Tracker**.
- Built a **Dashboard** called **Expense Tracker Dashboard** to provide a visual summary of budgets and expenses.
- The dashboard displays key metrics, trends, and expense summaries for better decision-making.





3. Sharing Settings

- Reviewed **Org-Wide Defaults, Role Hierarchies, and Profile Permissions** to ensure proper access control.
- Ensured that managers have full access to budgets and expenses, while employees can view budgets and manage their own expenses only.

