

# Phase 9: Reporting, Dashboards & Security Review

**Goal:** Provide HR & Managers with insights while ensuring secure access to leave data.

## 1. Reports

- **Employee Leave Report:** Total leaves taken by each employee in a period.
- **Leave Type Report:** Breakdown of Sick Leave, Casual Leave, etc.
- **Pending Requests Report:** Leaves still awaiting manager approval.

The screenshot shows a Salesforce Lightning interface with a report titled "Leave Requests Report". The report is filtered by "Leave Request: Owner Name" set to "Vangala NagaDivya (14)". The report table has columns: Leave Request: Leave Request Id, Leave Request: Created By, Leave Request: Created Date, From Date, To Date, Manager Comment, User, and Reason. The data shows 14 leave requests for Vangala NagaDivya, with reasons ranging from "For personal reason" to "Fever". A subtotal row shows a total of 14 requests. The interface includes a search bar, a "Leave Tracker App" tab, and a "Leave Requests Report" tab. The bottom of the screen shows a Windows taskbar with various application icons and system information.

Leave Request: Owner Name	Leave Request: Leave Request Id	Leave Request: Created By	Leave Request: Created Date	From Date	To Date	Manager Comment	User	Reason
Vangala NagaDivya (14)	A0000	Vangala NagaDivya	9/23/2025	3/10/2023	3/11/2023	-	Vangala NagaDivya	For personal reason
	A0001	Vangala NagaDivya	9/23/2025	3/15/2023	3/15/2023	-	Vangala NagaDivya	test
	A0002	Vangala NagaDivya	9/23/2025	3/19/2023	3/19/2023	-	Vangala NagaDivya	For personal reason
	A0003	Vangala NagaDivya	9/23/2025	9/24/2025	9/2/2025	-	Vangala NagaDivya	test
	A0004	Vangala NagaDivya	9/23/2025	9/24/2025	9/26/2025	-	Vangala NagaDivya	test
	A0008	Vangala NagaDivya	9/24/2025	9/25/2025	9/26/2025	-	Vangala NagaDivya	test
	A0013	Vangala NagaDivya	9/25/2025	9/26/2025	9/27/2025	-	Vangala NagaDivya	Fever
	A0007	Vangala NagaDivya	9/24/2025	9/25/2025	9/26/2025	-	John Mikaelson	test
	A0005	Vangala NagaDivya	9/24/2025	9/25/2025	9/26/2025	Take a Rest	John Mikaelson	test
	A0009	Vangala NagaDivya	9/24/2025	9/27/2025	9/29/2025	Take Rest	John Mikaelson	Fever
	A0006	Vangala NagaDivya	9/24/2025	9/25/2025	9/26/2025	test	John Mikaelson	test
	A0010	Vangala NagaDivya	9/24/2025	9/25/2025	9/27/2025	work	Nandhu Vangala	Going to family trip
	A0011	Vangala NagaDivya	9/24/2025	9/26/2025	9/27/2025	jhg	Nandhu Vangala	dtg
	A0012	Vangala NagaDivya	9/24/2025	9/27/2025	9/28/2025	test	Sweetly Pandey	test
Subtotal								
Total (14)								

## 2. Report Types

- Create a **custom report type** combining **Employee (User)** and **LeaveRequest\_\_c**.
- Example: "Employee Leave Requests by Department" → shows department-wise leave usage.

### 3. Dashboards

Dashboards visually display leave metrics.

#### A. Create Dashboard

Go to App Launcher → Dashboards → New

Add components from leave reports:

Metric: Count of Pending Leaves

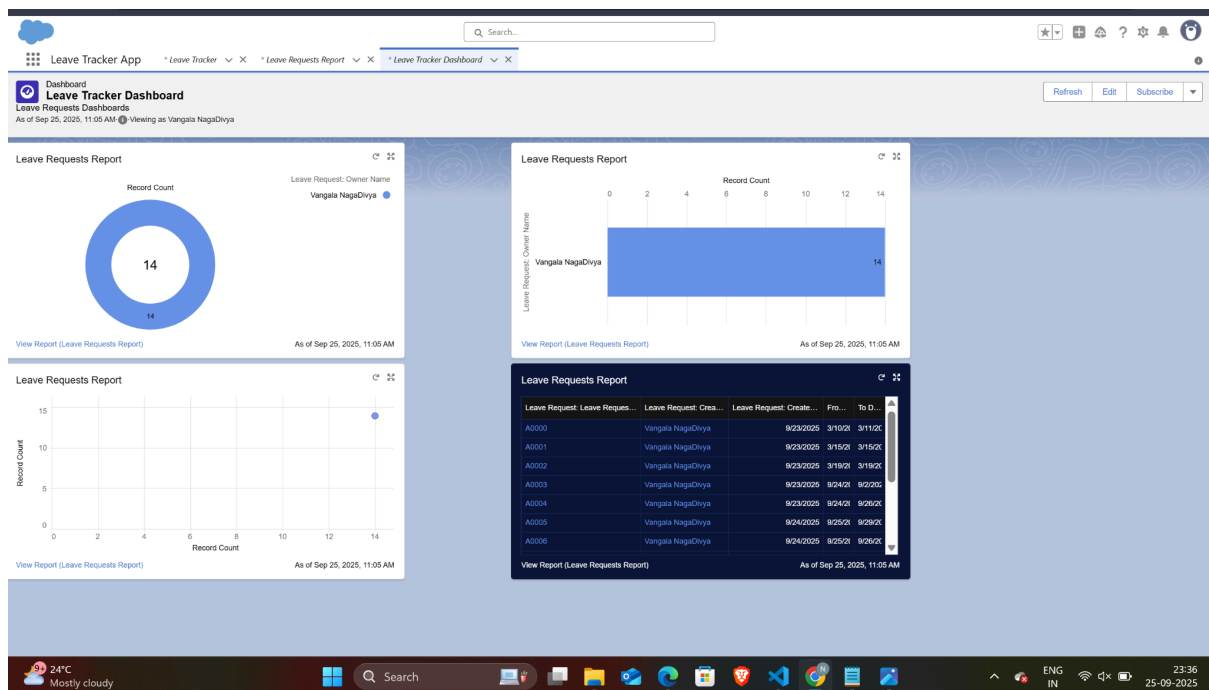
Pie Chart: Leaves by Type

Bar Chart: Leaves by Status

Line Chart: Leaves Over Time

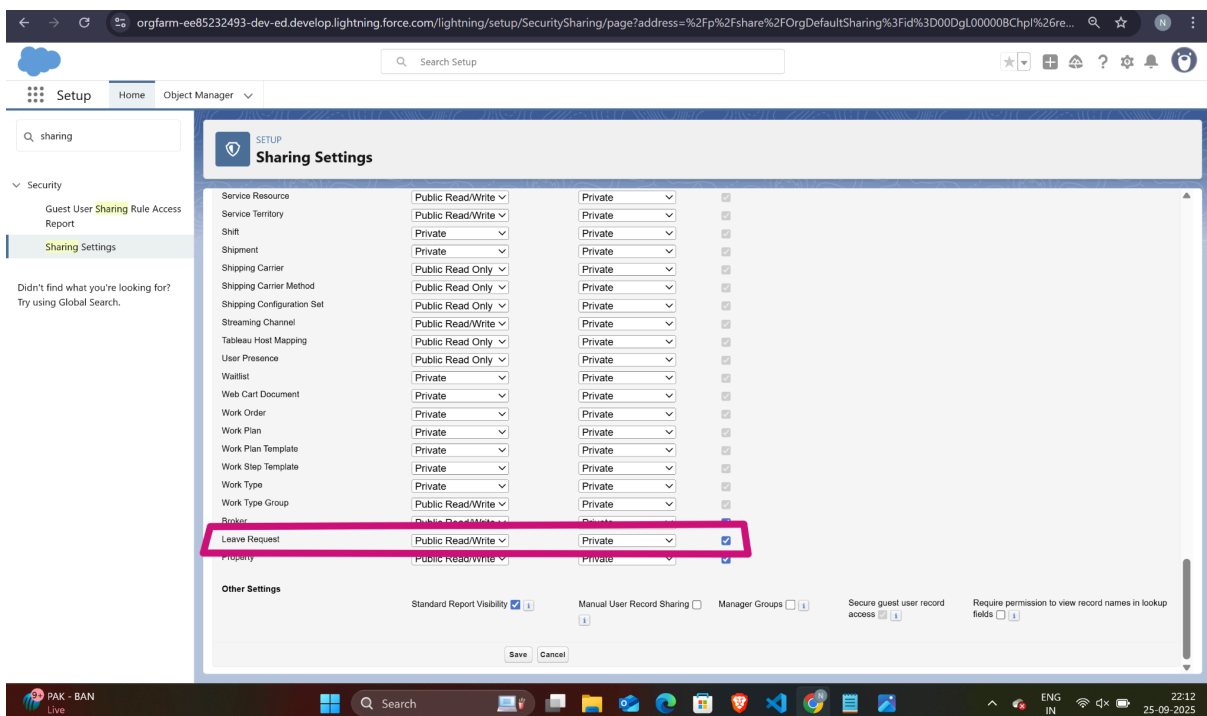
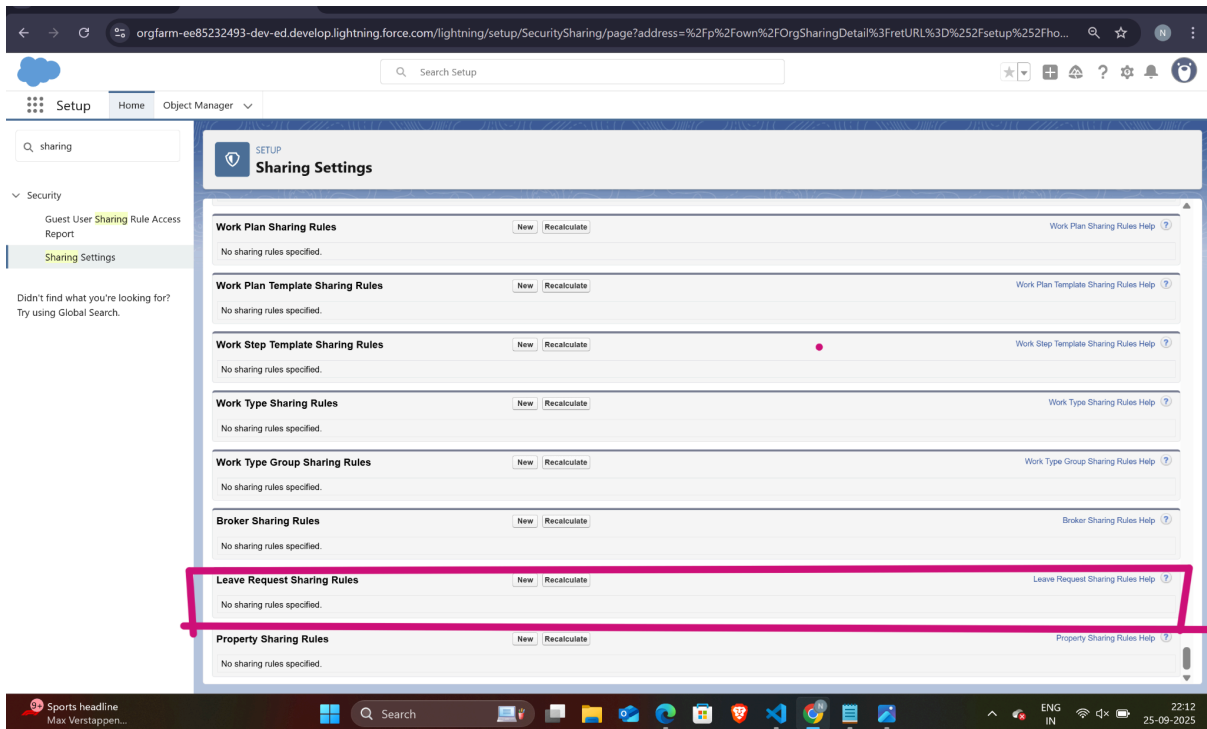
#### B. Dynamic Dashboards

Managers → See only their team's data. HR/Admins → See complete organization-level data.



### 4. Sharing Settings

- **Leave Requests:** Private (only employee, manager, and HR can see).
- **Employee Directory:** Public read-only (basic details only).



## 5. Session Settings

- Configure session timeout to **30 minutes** of inactivity.
- Prevents unauthorized access on shared devices.

## 6. Audit Trail

- Track all changes to **LeaveRequest\_\_c** records.

- Example: Who approved/rejected a leave, and when.
- Provides compliance visibility for HR audits.

View Setup Audit Trail

The last 20 entries for your organization are listed below. You can download your organization's setup audit trail for the last six months (Excel .csv file).

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/24/2025, 11:23:06 PM PDT	vaqalanaadova123457@agentforce.com		Changed myLeaves Lightning Web Component	Lightning Components	
9/24/2025, 11:23:06 PM PDT	vaqalanaadova123457@agentforce.com		Changed leaveTracker Lightning Web Component	Lightning Components	
9/24/2025, 11:23:06 PM PDT	vaqalanaadova123457@agentforce.com		Changed leaveRequests Lightning Web Component	Lightning Components	
9/24/2025, 11:22:10 PM PDT	vaqalanaadova123457@agentforce.com		Changed myLeaves Lightning Web Component	Lightning Components	
9/24/2025, 11:22:10 PM PDT	vaqalanaadova123457@agentforce.com		Changed leaveTracker Lightning Web Component	Lightning Components	
9/24/2025, 11:22:10 PM PDT	vaqalanaadova123457@agentforce.com		Changed leaveRequests Lightning Web Component	Lightning Components	
9/24/2025, 11:16:17 PM PDT	vaqalanaadova123457@agentforce.com		Changed myLeaves Lightning Web Component	Lightning Components	
9/24/2025, 11:16:17 PM PDT	vaqalanaadova123457@agentforce.com		Changed leaveTracker Lightning Web Component	Lightning Components	
9/24/2025, 11:16:17 PM PDT	vaqalanaadova123457@agentforce.com		Changed leaveRequests Lightning Web Component	Lightning Components	
9/24/2025, 11:14:29 PM PDT	vaqalanaadova123457@agentforce.com		Changed myLeaves Lightning Web Component	Lightning Components	
9/24/2025, 11:14:29 PM PDT	vaqalanaadova123457@agentforce.com		Changed LeaveRequestController Apex Class code	Apex Class	
9/24/2025, 10:55:38 PM PDT	vaqalanaadova123457@agentforce.com		Changed myLeaves Lightning Web Component	Lightning Components	
9/24/2025, 10:55:38 PM PDT	vaqalanaadova123457@agentforce.com		Changed leaveTracker Lightning Web Component	Lightning Components	
9/24/2025, 10:55:38 PM PDT	vaqalanaadova123457@agentforce.com		Changed leaveRequests Lightning Web Component	Lightning Components	
9/24/2025, 10:26:52 PM PDT	vaqalanaadova123457@agentforce.com		Deactivated flow version #5 "LeaveApprovalEmailFlow" for flow with Unique Name "LeaveApprovalEmailFlow"	Flows	
9/24/2025, 10:26:52 PM PDT	vaqalanaadova123457@agentforce.com		Activated flow version #7 "LeaveApprovalEmailFlow" for flow with Unique Name "LeaveApprovalEmailFlow"	Flows	
9/24/2025, 10:26:48 PM PDT	vaqalanaadova123457@agentforce.com		Deleted flow version #7 "LeaveApprovalEmailFlow" for flow with Unique Name "LeaveApprovalEmailFlow"	Flows	
9/24/2025, 10:26:46 PM PDT	vaqalanaadova123457@agentforce.com		Created flow version #7 "LeaveApprovalEmailFlow" for flow with Unique Name "LeaveApprovalEmailFlow"	Flows	
9/24/2025, 10:25:32 PM PDT	vaqalanaadova123457@agentforce.com		Created flow version #7 "LeaveApprovalEmailFlow" for flow with Unique Name "LeaveApprovalEmailFlow"	Flows	
9/24/2025, 10:22:18 PM PDT	vaqalanaadova123457@agentforce.com		Activated flow version #6 "LeaveApprovalEmailFlow" for flow with Unique Name "LeaveApprovalEmailFlow"	Flows	

Download setup audit trail for last six months (Excel .csv file)

## Phase 9 Outcome:

- Real-time insights into leave trends and approval status.
- Dashboards for employees, managers, and HR for tailored reporting.
- Strong security with FLS, IP restrictions, and audit trails.
- Ensures both **data visibility** and **data protection** across the Leave Tracking App.