

Phase 9: Reporting, Dashboards & Security Review

1. Reports (Tabular, Summary, Matrix, Joined)

- **Tabular Report** → Simple list of travel requests.
- **Summary Report** → Grouped by Department for approval insights.
- **Matrix Report** → Expenses by Department vs. Approval Status.
- **Joined Report** → Combine Travel Approvals with Expense Items.

REPORT ▼

New Travel Approvals Report

Travel Approvals

Previewing a limited number of records. Run the report to see everything.

Travel Approval: Travel Approval #	Department	Status	Out-of-State	Destination State	Trip Start Date	Trip End Date
1 TA-00001	Technology	Approved	<input checked="" type="checkbox"/>	CA	28/07/2025	29/07/2025
2 TA-00002	Technology	Rejected	<input checked="" type="checkbox"/>	GO	08/08/2025	15/08/2025
3 TA-00003	college_trip	Pending Approval	<input type="checkbox"/>	-	08/08/2025	13/08/2025
4 TA-00004	Disability Determination Bureau	Approved	<input checked="" type="checkbox"/>	OK	10/01/2019	10/01/2019
5 TA-00005	Division of Disability and Rehabilitative Services	Rejected	<input checked="" type="checkbox"/>	OK	04/03/2019	04/06/2019
6 TA-00006	Division of Finance	Rejected	<input checked="" type="checkbox"/>	CA	03/09/2019	03/09/2019
7 TA-00007	Division of Aging	Approved	<input checked="" type="checkbox"/>	GA	11/05/2019	11/11/2019
8 TA-00008	Technology	Approved	<input type="checkbox"/>	TX	03/06/2019	03/09/2019
9 TA-00009	Division of Disability and Rehabilitative Services	Approved	<input checked="" type="checkbox"/>	FL	11/06/2019	11/12/2019
10 TA-00010	Disability Determination Bureau	Rejected	<input checked="" type="checkbox"/>	OK	03/06/2019	03/07/2019
11 TA-00011	Contract Management	Approved	<input checked="" type="checkbox"/>	OK	05/11/2019	05/11/2019
12 TA-00012	Division of Disability and Rehabilitative Services	Approved	<input checked="" type="checkbox"/>	GA	07/07/2019	07/07/2019
13 TA-00013	Office of Communications and Media	Approved	<input checked="" type="checkbox"/>	OK	06/02/2019	06/12/2019
14 TA-00014	Office of Medicaid Policy and Planning	Approved	<input checked="" type="checkbox"/>	CA	11/05/2019	11/11/2019
15 TA-00015	Division of Family Resources	Approved	<input type="checkbox"/>	TX	04/01/2019	04/01/2019
16 TA-00016	Human Resources	Approved	<input checked="" type="checkbox"/>	FL	07/09/2019	07/11/2019
17 TA-00017	Division of Disability and Rehabilitative Services	Approved	<input checked="" type="checkbox"/>	OK	10/11/2019	10/12/2019

2. Report Types

- Custom report types created to link **Travel Approvals with Expense Items**.
- Helps generate department-wise or trip-wise financial reports.

REPORT ▼

Travel Requests by Department

Travel Approvals

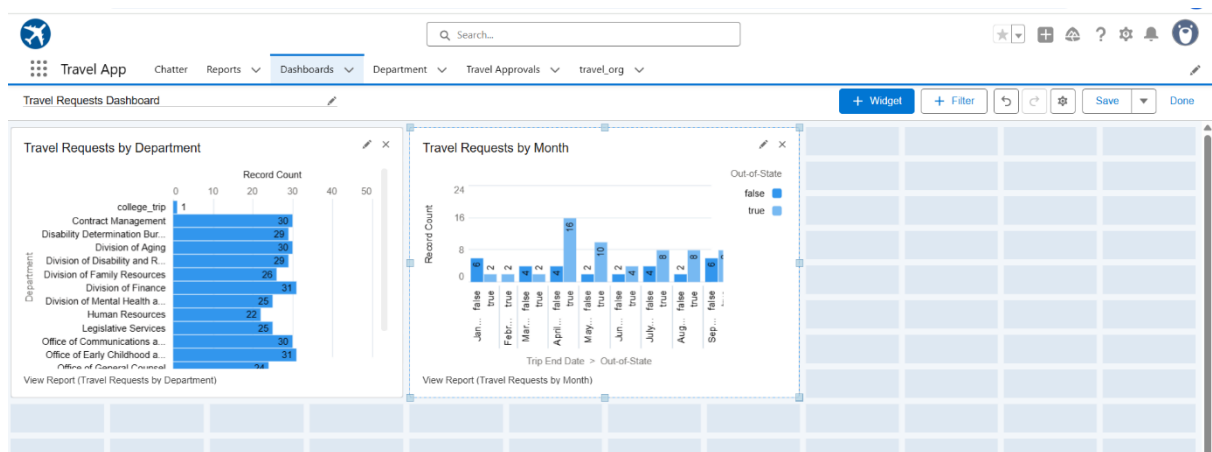
Previewing a limited number of records. Run the report to see everything.

Department	Travel Approval: Travel Approval #	Status	Out-of-State	Destination State	Trip Start Date	Trip End Date
college_trip (1)	TA-00003	Pending Approval	<input type="checkbox"/>	-	08/08/2025	13/08/2025
Subtotal			0			
Contract Management (1)	TA-00011	Approved	<input checked="" type="checkbox"/>	OK	05/11/2019	05/11/2019
Subtotal			1			
Disability Determination Bureau (2)	TA-00004	Approved	<input checked="" type="checkbox"/>	OK	10/01/2019	10/01/2019
	TA-00010	Rejected	<input checked="" type="checkbox"/>	OK	03/06/2019	03/07/2019
Subtotal			2			
Division of Aging (1)	TA-00007	Approved	<input checked="" type="checkbox"/>	GA	11/05/2019	11/11/2019
Subtotal			1			
Division of Disability and Rehabilitative Services (4)	TA-00005	Rejected	<input checked="" type="checkbox"/>	OK	04/03/2019	04/06/2019
	TA-00009	Approved	<input checked="" type="checkbox"/>	FL	11/06/2019	11/12/2019
	TA-00012	Approved	<input checked="" type="checkbox"/>	GA	07/07/2019	07/07/2019
	TA-00017	Approved	<input checked="" type="checkbox"/>	OK	10/11/2019	10/12/2019
Subtotal			4			
Division of Family Resources (1)	TA-00015	Approved	<input type="checkbox"/>	TX	04/01/2019	04/01/2019
Subtotal			0			

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒ Conditional Formatting

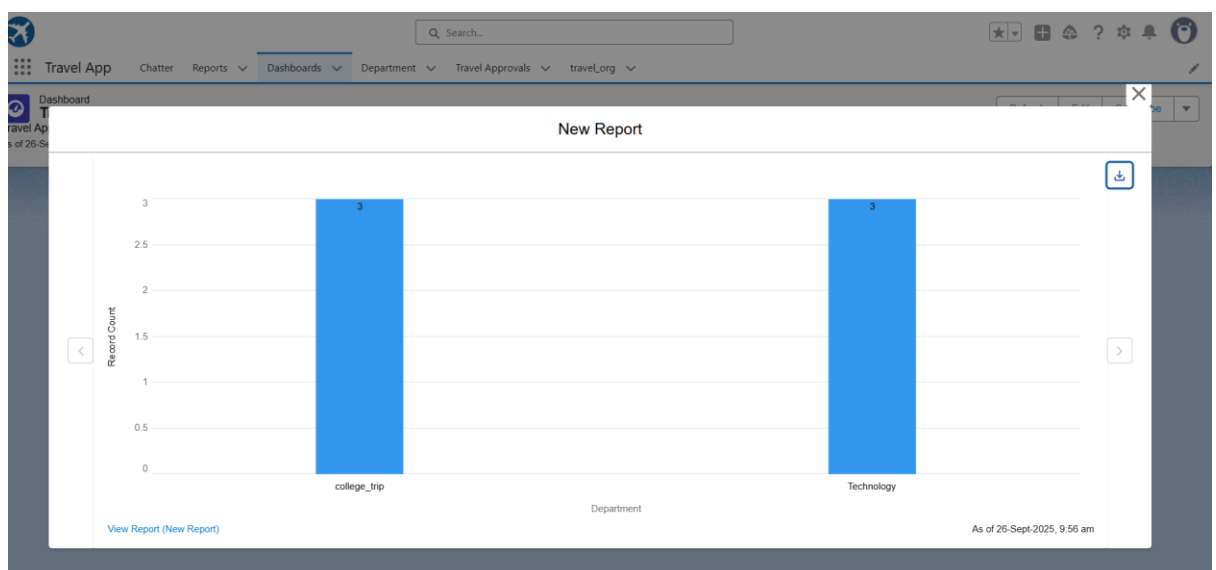
3. Dashboards

- Dashboards built for quick visualization:
 - Bar Chart → Pending Approvals by Department.
 - Pie Chart → Expense Breakdown.
 - Line Chart → Monthly Travel Requests.
 - Gauge → Budget Utilization.



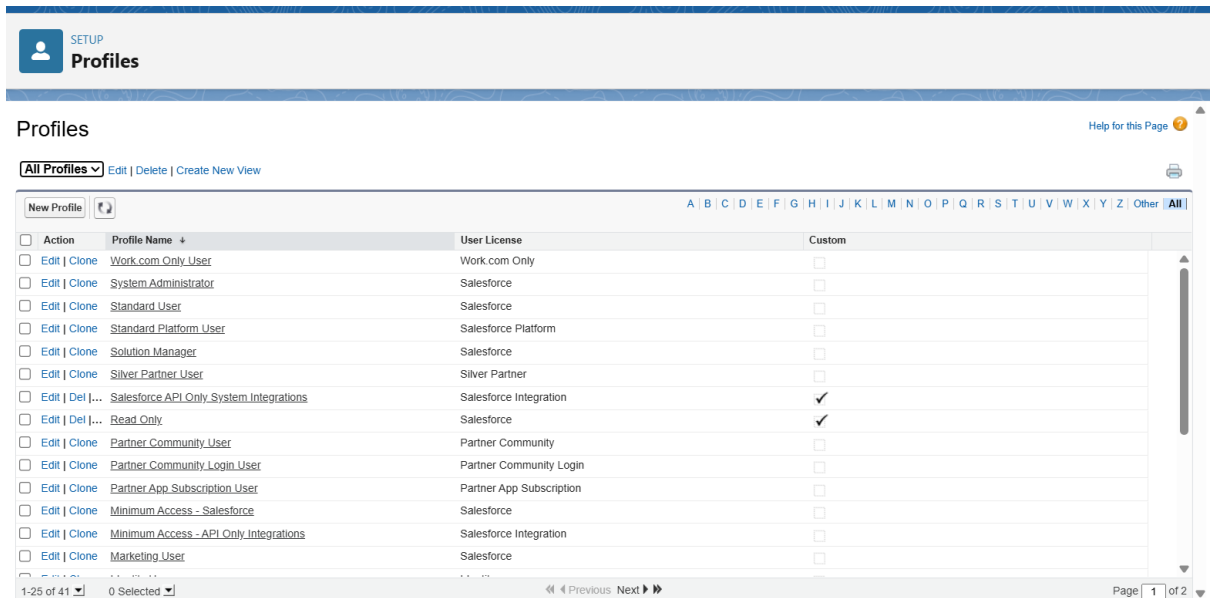
4. Dynamic Dashboards

- Each user sees only **their own data**.
- Employee → only own requests.
- Manager → requests from team.
- Admin → all requests.



5. Profiles

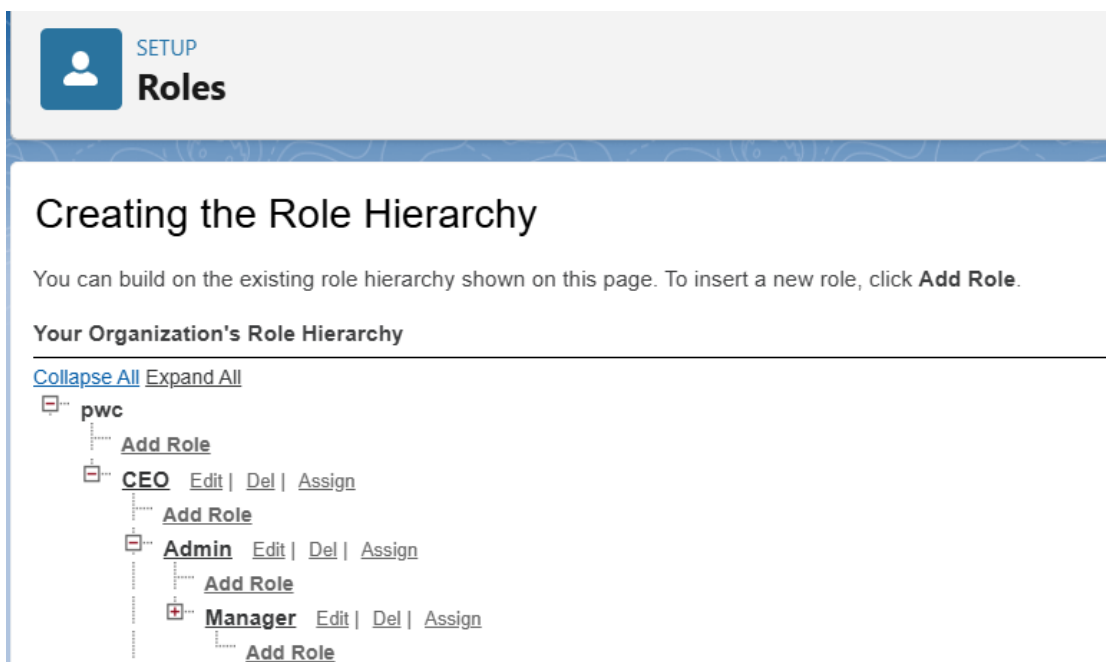
- **Employee Profile** → Create requests, view own.
- **Manager Profile** → Approve/reject requests.
- **Admin Profile** → Full access.



Action	Profile Name	User License	Custom
Edit Clone	Work.com Only User	Work.com Only	<input type="checkbox"/>
Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Del ...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
Edit Del ...	Read Only	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Partner Community User	Partner Community	<input type="checkbox"/>
Edit Clone	Partner Community Login User	Partner Community Login	<input type="checkbox"/>
Edit Clone	Partner App Subscription User	Partner App Subscription	<input type="checkbox"/>
Edit Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
Edit Clone	Minimum Access - API Only Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Clone	Marketing User	Salesforce	<input type="checkbox"/>

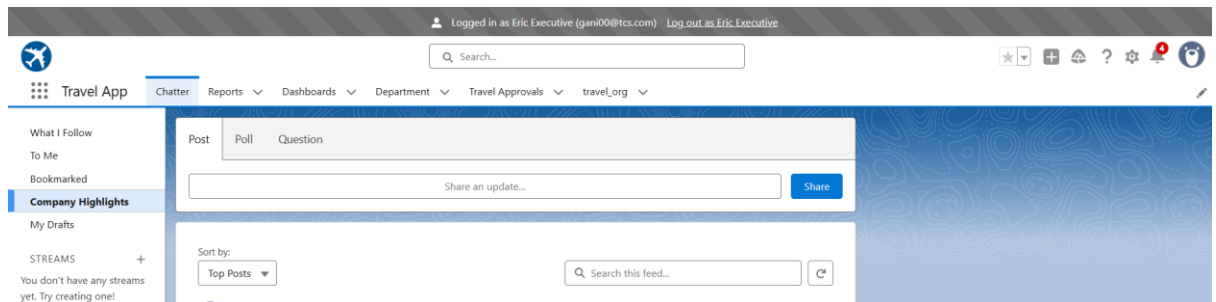
6. Roles

- Role hierarchy: Admin → Manager → Employee.
- Ensures managers see subordinates' records automatically.



7. Permission Sets

- Extra access granted without changing profile.
- Finance Team → Expense Report Access.
- Travel Desk → View All Requests.



8. Organization-Wide Defaults (OWD)

- Travel Approval → Private.
- Expense Item → Controlled by Parent.
- Department → Public Read Only.

Department	Public Read/Write	Private	✓
Expense Item	Controlled by Parent	Controlled by Parent	
Travel Approval	Public Read/Write	Private	✓
travelorg	Public Read/Write	Private	✓

9. Sharing Rules

- Approved Travel Requests shared with Finance.
- International requests shared with Travel Desk.

Travel Approval Sharing Rules		New	Recalculate	Travel Approval Sharing Rules Help ?	
Action	Criteria	Shared With		Access Level	
Edit Del	Travel Approval: Status EQUALS Approved	Group: Finance Team		Read/Write	
Edit Del	Travel Approval: Out-of-State EQUALS True	Group: Travel Desk		Read/Write	

10. Sharing Settings

- Enabled manual sharing for Travel Approvals.
- Fine-tuned object-level sharing in Setup.

The screenshot shows the 'Sharing Settings' page in Salesforce Setup. It is divided into five steps:

- Step 2: Select your rule type** - 'Based on criteria' is selected.
- Step 3: Select which records to be shared** - A criteria table is shown with columns 'Field', 'Operator', and 'Value'. The first row is 'Out-of-State' equals 'True'. Below the table, 'Additional Options' includes 'Include records owned by users who can't have an assigned role' checked.
- Step 4: Select the users to share with** - 'Share with' is set to 'Public Groups' and 'Travel Desk'.
- Step 5: Select the level of access for the users** - 'Access Level' is set to 'Read/Write'.

'Save' and 'Cancel' buttons are at the bottom.

11. Field Level Security (FLS)

- Employees cannot see Manager Comments.
- Only Finance sees Expense Amount.

Set Field-Level Security

Total Expenses

Save Cancel

Field Label	Total Expenses
Data Type	Roll-Up Summary (SUM Expense Item)

Field-Level Security for Profile	<input type="checkbox"/> Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

12. Session Settings

- Auto logout after 2 hours inactivity.
- Restrict multiple device logins.

SETUP

Session Settings

Session Settings

Help for this Page

Set the session security and session expiration timeout for your organization.

Session Timeout

Timeout Value4 hours

☐ Disable session timeout warning popup

☒ Force logout on session timeout

Session Settings

☐ Lock sessions to the IP address from which they originated

☒ Lock sessions to the domain in which they were first used

☐ Terminate all of a user's sessions when an admin resets that user's password

☒ Force relogin after Login-As-User

☐ Require HttpOnly attribute

☐ Use POST requests for cross-domain sessions

☐ Enforce login IP ranges on every request

☐ When embedding a Lightning application in a third-party site, use a session token instead of a session cookie

Extended use of IE11 with Lightning Experience

EXTENDED USE OF IE11 WITH LIGHTNING EXPERIENCE HAS NOW ENDED

AS OF DECEMBER 31, THE EXTENDED PERIOD HAS ENDED, AND USE OF INTERNET EXPLORER 11 (IE 11) WITH LIGHTNING EXPERIENCE IS NO LONGER SUPPORTED. ISSUES WITH PERFORMANCE OR FUNCTIONALITY THAT AFFECT ONLY IE 11 WILL NOT BE FIXED. PLEASE SWITCH TO A SUPPORTED BROWSER.

13. Login IP Ranges

- Allowed only from corporate VPN/office IPs.
- Blocks unauthorized access.

Login IP Ranges

Help for this Page

Enter the range of valid IP addresses from which users with this profile can log in.

SaveCancel

Please specify IP range

Required Information

Start IP Address10.10.2.9

End IP Address10.10.2.523

Description

SaveCancel