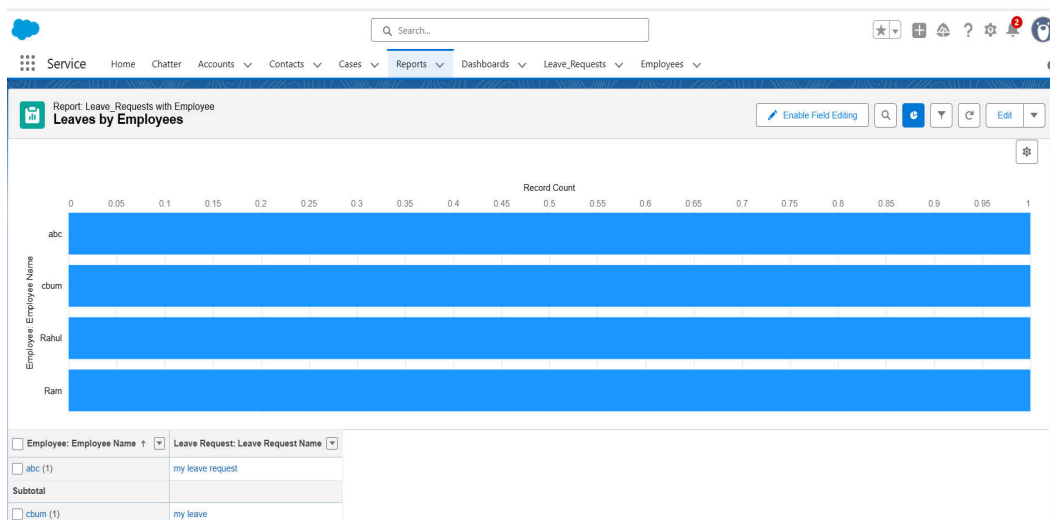


Phase 9: Reporting, Dashboards & Security Review

1. Reports

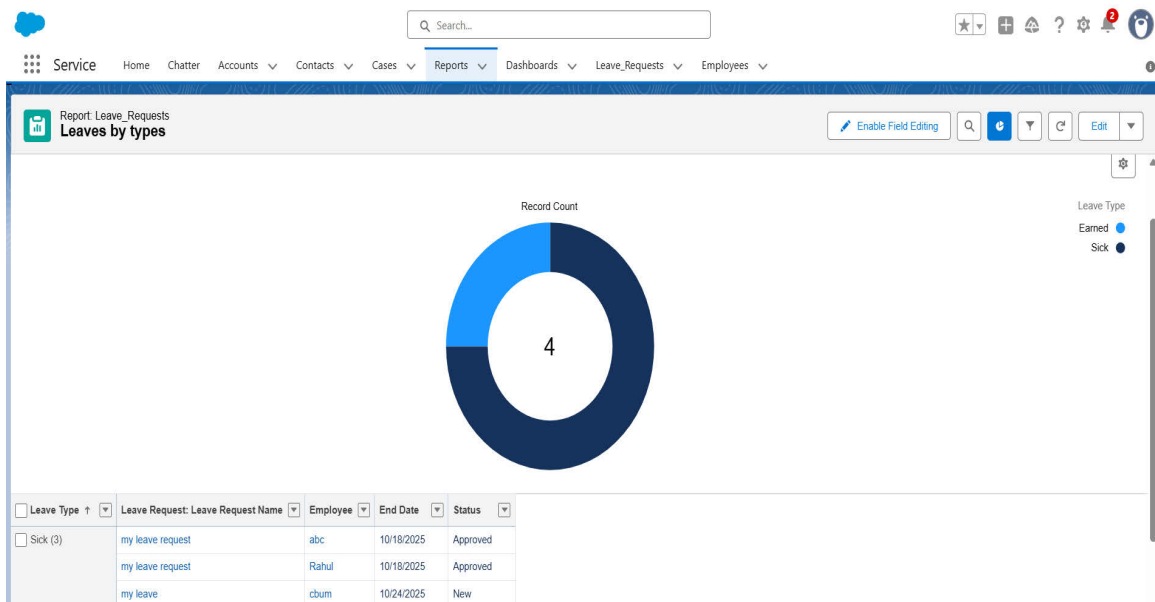
a) Leaves by Employee (Bar Chart)

- **Steps:**
 1. Go to **Reports** → **New Report**.
 2. Select **Leave Requests with Employee**.
 3. Group by **Employee__c**.



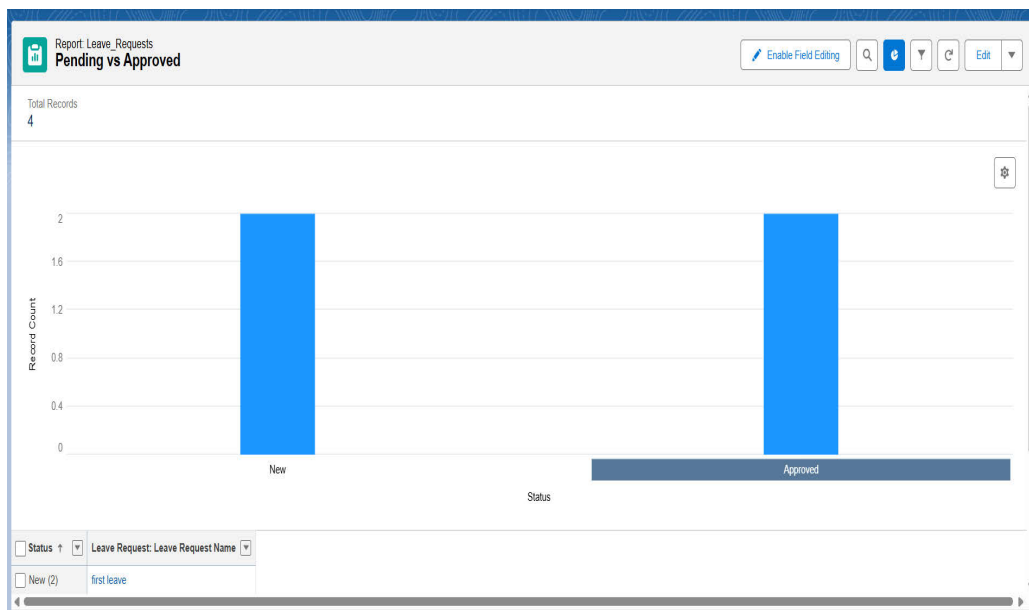
b) Leaves by Type (Pie Chart)

- **Steps:**
 1. Create **New Report** → **Leave Requests**.
 2. Group by **Leave_Type__c**.
 3. Add a **Pie Chart** → Slices represent Sick, Casual, Earned.



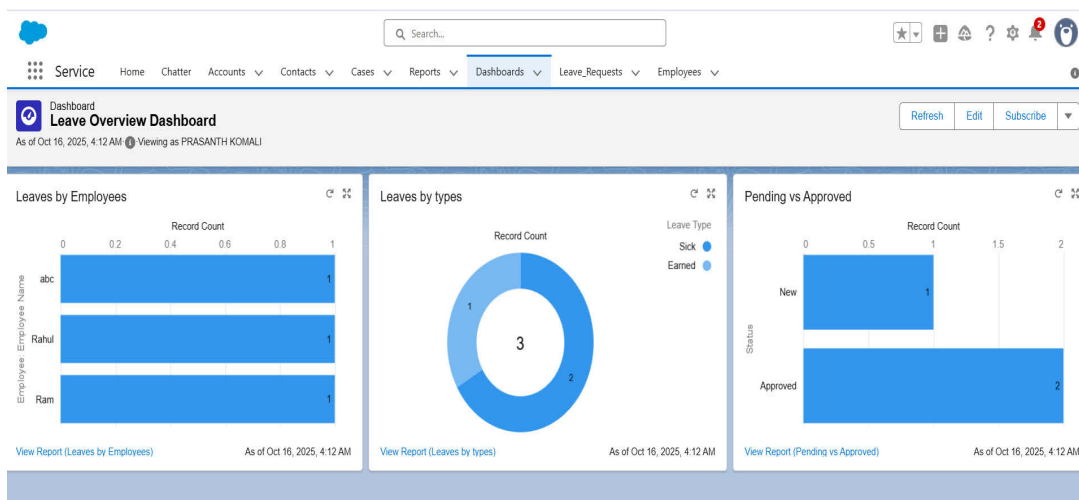
c) Pending vs Approved Leaves

- **Steps:**
 1. Create **New Report** → **Leave Requests**.
 2. Group by **Status__c** (New, Approved, Rejected).
 3. Added a **BarChart** to compare status counts.



2. Dashboard: Leave Overview Dashboard

- **Steps:**
 1. Go to **Dashboards** → **New Dashboard**.
 2. Name: Leave Overview Dashboard.
 3. Add Components:
 - Bar Chart → Leaves by Employee
 - Pie Chart → Leaves by Type
 - Donut Chart → Pending vs Approved Leaves
 4. Save & Refresh.



3. Security Review

a) Field-Level Security

- **Status__c field in Leave_Request__c**
 - Employees should NOT edit Status.
 - Only Managers/Admins should update it.
- **Steps:**
 1. Go to Object Manager → Leave_Request__c → Fields → Status__c.
 2. Click Set Field-Level Security.

3. Uncheck for Employee profile, keep visible/editable for Manager/Admin.

b) Sharing Rules

- **Requirement:**

- Employees can only see their own requests.
- Managers can see subordinates' requests.

- **Steps:**

1. Go to **Setup → Sharing Settings**.
2. For Leave_Request__c → Set OWD (Org-Wide Default) = **Private**.
3. Create **Sharing Rule**: Manager Role → Share with subordinates' records.

Outcome

- Reports give a clear visual overview of leave requests.
- Dashboard provides management-friendly insights.
- Security ensures data protection & role-based access, just like in real IT companies.