

Phase 9: Reporting, Dashboards & Security Review

Goal

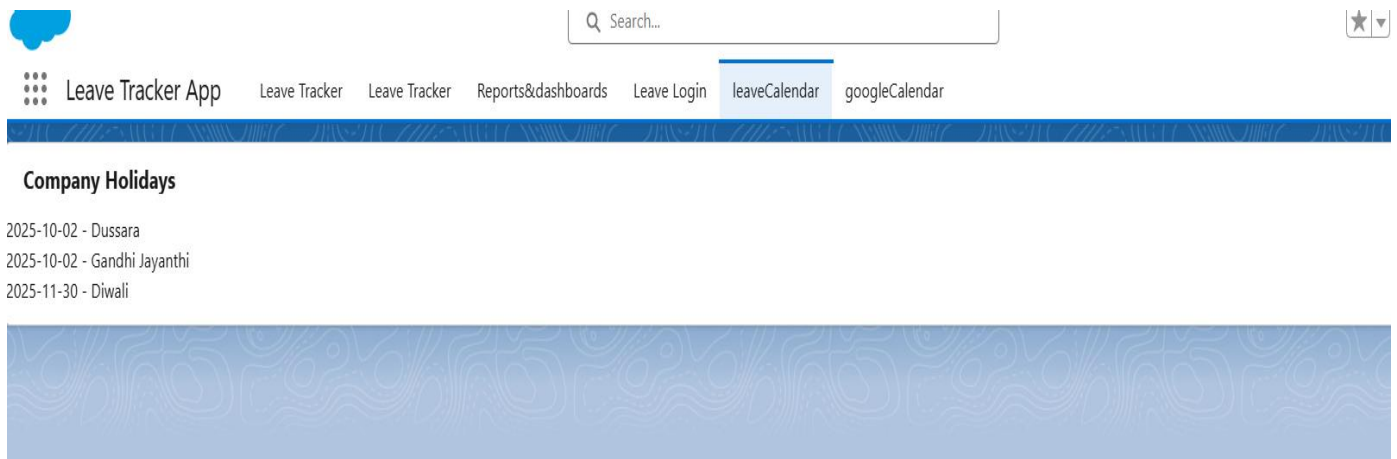
- Track leave requests and approvals with reports & dashboards.
- Protect sensitive employee leave data from unauthorized access.
- Ensure managers, HR, and employees see the right information in real time.

Reports

- Created different report formats to track leave usage:

Report Types

- Created a Custom Report Type:
- Primary Object: LeaveRequest__c
- Related Object: User
- Calender: Leave Calender
- Calender:Google Calender



Security

A. Sharing Settings

- Org-Wide Defaults (OWD): Leave Requests = Private (only owner, manager, HR can see).
- Sharing Rules: Managers can access their team's requests.
- Role Hierarchy: Employee → Manager → HR → Admin.

Setup Home Object Manager

Q Search Setup

Q shar

Security

Guest User Sharing Rule Access Report

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

Sharing Settings

Service Resource	Public Read/Write	Private	
Service Territory	Public Read/Write	Private	
Skill	Private	Private	
Shipment	Private	Private	
Shipping Carrier	Public Read Only	Private	
Shipping Carrier Method	Public Read Only	Private	
Shipping Configuration Set	Public Read Only	Private	
Streaming Channel	Public Read/Write	Private	
Tableau Host Mapping	Public Read Only	Private	
User Presence	Public Read Only	Private	
Website	Private	Private	
Web Cart Document	Private	Private	
Work Order	Private	Private	
Work Plan	Private	Private	
Work Plan Template	Private	Private	
Work Step Template	Private	Private	
Work Type	Private	Private	
Work Type Group	Public Read/Write	Private	
Leave Management	Public Read/Write	Private	
Leave Request	Public Read/Write	Private	<input checked="" type="checkbox"/>

Other Settings

Standard Report Visibility ☒ Manual User Record Sharing ☐ Manager Groups ☐ Secure guest user record access ☐ Require permission to view record names in lookup fields ☐

Save Cancel

Welcome to Salesforce: Reset y... Leave Tracker | Salesforce Leave Tracker | Salesforce Sharing Settings | Salesforce Profiles | Salesforce

orgfarm-cc1ba0e194-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home

Q Search Setup

Setup Home Object Manager

Q sharing settings

Security

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

Sharing Settings

Work Plan Template Sharing Rules [New](#) [Recalculate](#) [Work Plan Template Sharing Rules Help](#)

No sharing rules specified.

Work Step Template Sharing Rules [New](#) [Recalculate](#) [Work Step Template Sharing Rules Help](#)

No sharing rules specified.

Work Type Sharing Rules [New](#) [Recalculate](#) [Work Type Sharing Rules Help](#)

No sharing rules specified.

Work Type Group Sharing Rules [New](#) [Recalculate](#) [Work Type Group Sharing Rules Help](#)

No sharing rules specified.

Flight Sharing Rules [New](#) [Recalculate](#) [Flight Sharing Rules Help](#)

No sharing rules specified.

Leave Request Sharing Rules [New](#) [Recalculate](#) [Leave Request Sharing Rules Help](#)

No sharing rules specified.

Passenger Sharing Rules [New](#) [Recalculate](#) [Passenger Sharing Rules Help](#)

<https://orgfarm-cc1ba0e194-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home>

Dashboards

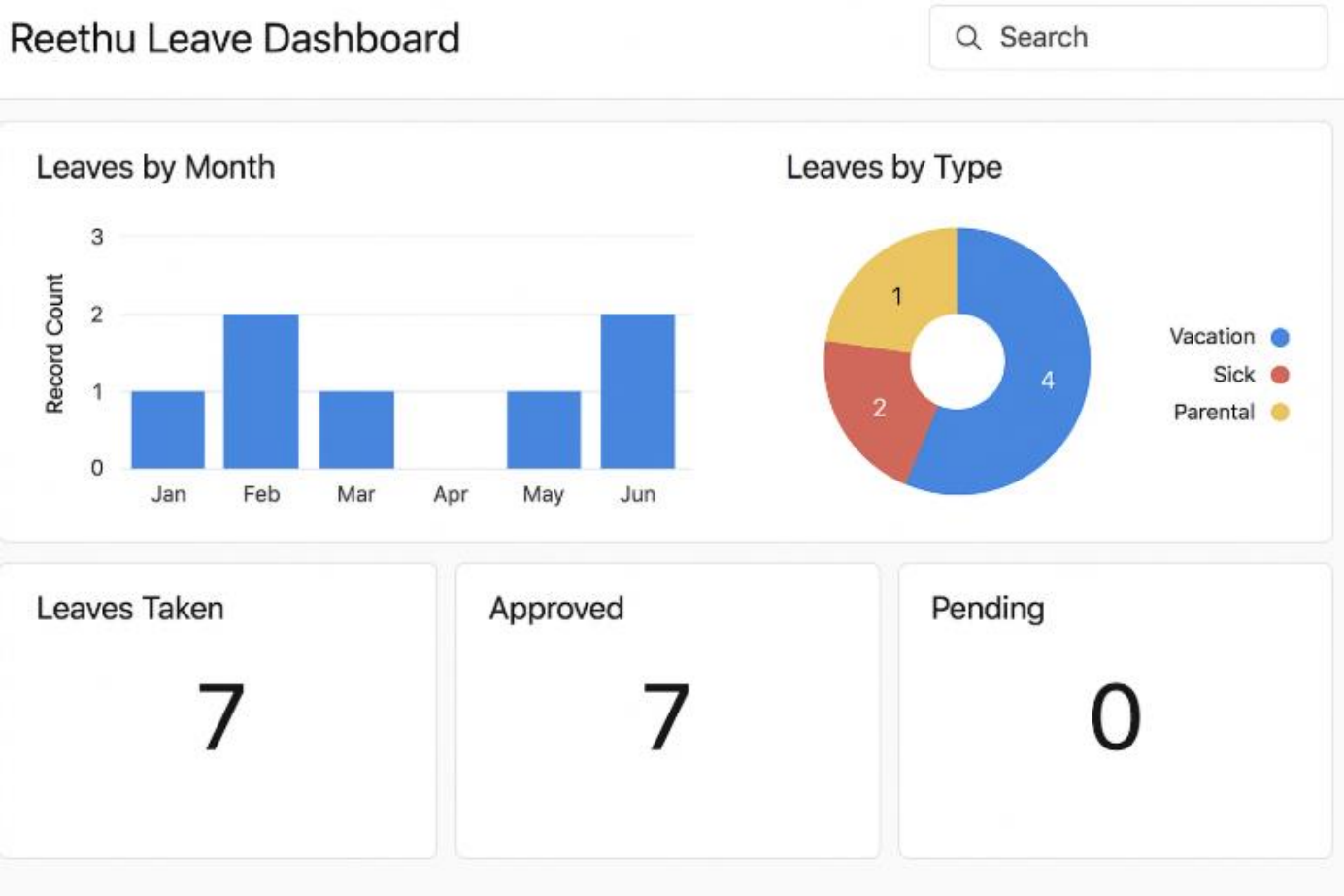
Dashboards visually display leave metrics.

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.



Field Level Security (FLS)

- Employees: Can see only their leave details.
- Managers: Can see team leaves + approval fields.
- Sensitive fields (like Manager Comments) hidden from employees.

Leave Tracker App

Leave Tracker

Leave Tracker

Reports&dashboards

Leave Login

Leave Controller Login

Username

Password

Login