# Phase 9: Reporting, Dashboards & Security Review

Objective

To create meaningful reports and dashboards that track employee onboarding progress and training status, and to perform a security review ensuring proper access controls.

Reports

- **Onboarding Tasks by Status** → grouped by Task Status (Not Started, In Progress, Completed).

- **Overdue Onboarding Tasks** → filter Due Date <= TODAY and Task Status ≠ Completed.

- **Training Completion by Module** → grouped by Training Module.

- **New Hires This Month** → filter Date of Joining = THIS MONTH.
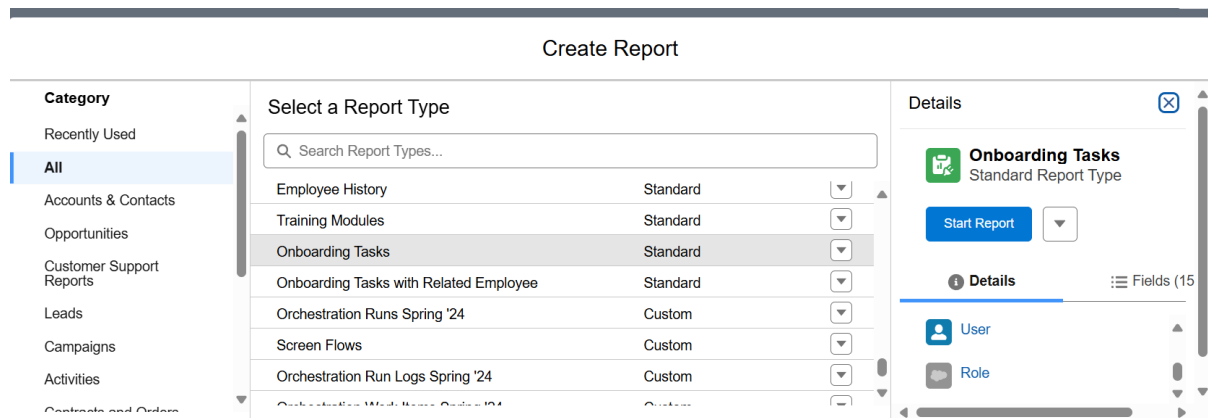
New Dashboard

* Name

Onboarding & Training Dashboard

Description

Folder

Onboarding Tracker Dashboards   Select Folder

Cancel   Create

Setup   Home   Object Manager ⌄

Report Types

Feature Settings
  Analytics
    Reports & Dashboards
      Report Types

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

Details   [pencil]

Display ...   Employee with Onboarding
              Tasks
API Name   Employee_with_Onboarding_Tas
Descrip...   Employee with Onboarding
              Tasks
Created...   Janaki Chandragiri, 01/10/25,
              11:40 am
Store in...   employee
Deploy...   In Development
Modifie...   Janaki Chandragiri, 01/10/25,
              11:40 am

Object Relationships   [pencil]

Employees (A)

A

A

Dashboards

- Created **Onboarding & Training Dashboard**.

- Components included:

  ○ Bar Chart: Onboarding Tasks by Status.

  ○ Donut Chart: Overdue Tasks.

New Dashboard

* Name

Onboarding & Training Dashboard

Description

Folder

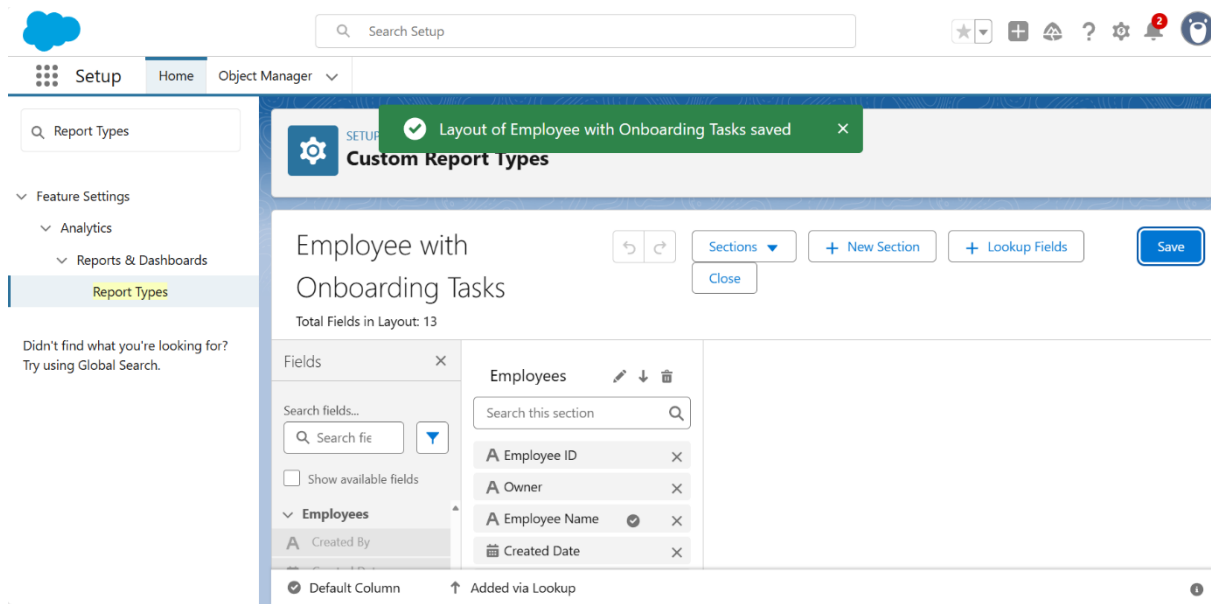Onboarding Tracker Dashboards   Select Folder

Cancel   Create

- o   Gauge: Training Completion %.

- o   Metric: New Hires this Month.

- Configured dashboard running user and refresh settings.

Report & Dashboard Folders

- Created **Onboarding Tracker Reports** folder.

- Created **Onboarding Tracker Dashboards** folder.

- Shared access with HR Manager and Training Admin roles only.

Security Review

- **OWD (Organization-Wide Defaults):** Set Private for Employee & Onboarding Task objects.

- **Roles:** Verified hierarchy (HR Manager → Training Admin → Employee).

- **Profiles:** HR Manager profile given Read/Create/Edit access; Employee profile given Read-Only.

- **Field-Level Security:** Sensitive fields restricted from Employee role.

- **Sharing Rules:** Configured for region-based access where needed.

- **Test Users:** Logged in as test user to verify proper data visibility.

Outcome of Phase 9

- Reports and dashboards built to monitor onboarding and training progress.

- Automated subscriptions set for HR Managers.

- Security settings reviewed and enforced to ensure proper visibility and compliance.