

ERM Hybrid Workforce Project – Phase 9

Phase 9: Reporting, Dashboards & Security Review

1. Reporting

Reports

Salesforce provides several report formats to meet different analytical needs:

- **Tabular Reports:** Simple rows of data; example: list of employees with active hybrid schedules.
- **Summary Reports:** Groups rows and provides subtotals; example: average well-being score by department.
- **Matrix Reports:** Group by rows and columns; example: pulse survey responses by location vs survey type.
- **Joined Reports:** Combine multiple related reports; example: employee status and hybrid schedule data in a single report.

Hybrid Workforce Pulse Survey Results					Enable Field Editing
Total Records					0
Total Records					3
	Employee	Survey Name	Date	Status	
1	Jane Doe		2023-10-26		
2	Jane Doe	Q3 WFH Sentiment	2023-10-26	Completed	
4	John Smith	Monthly Engagement	2023-10-25	Pending	
6	Alice Johnson	Return-to-Office	2023-10-24	Completed	

☰ To Do List ⚡ Recent Items

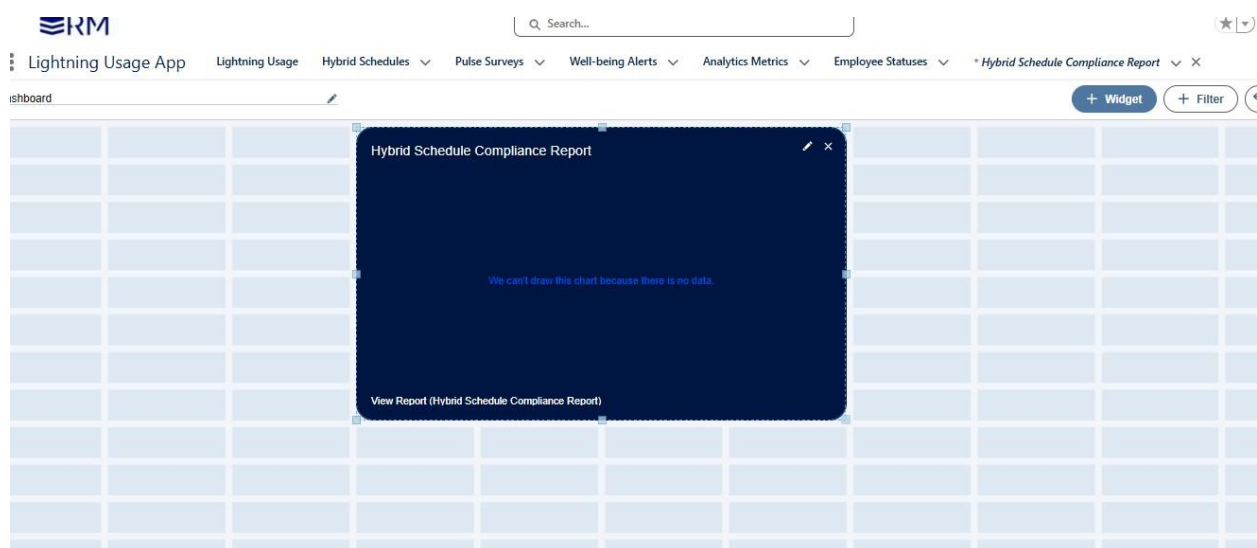
2. Report Types

Custom report types were created for ERM objects to allow reporting on multiple objects and relationships:

Custom Report Type	Primary Object	Related Object	Use Case
Employee Hybrid Schedule	Hybrid_Schedule__c	Employee_Status__c	Track employee attendance patterns
Employee Well-Being & Pulse Survey	Pulse_Survey__c	Well_Being_Alert__c	Analyze survey responses and alerts
Analytics Metrics	Analytics_Metric__c	Employee_Status__c	Track engagement and productivity metrics
Employee Status Overview	Employee_Status__c	Hybrid_Schedule__c	Monitor employee status and schedule compliance

3. Dashboards

- Visualize reports for HR, managers, and leadership.
- Example components:
 - Bar chart → Hybrid Schedule Compliance
 - Matrix → Pulse Survey & Well-Being Alerts
 - Table → Analytics Metrics
 - Gauge → Employee Status Overview



4. Dynamic Dashboards

- Personalized dashboards based on the logged-in user.
 - Managers see only their team data; HR and leadership see broader metrics.
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5. Security Review

Sharing Settings

- **Organization-Wide Defaults (OWD):**
 - All custom objects set to **Private**.
- **Role Hierarchy & Sharing Rules:**
 - Employees see their own records; managers see team data; HR/Leadership see all relevant data.
- **External Users:** Minimal access (schedules only, no sensitive alerts).

Organization-Wide Sharing Defaults Edit

Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significant system resources and makes records visible to record owners and those above them in the role hierarchy, and access can be extended using sharing rules.

<div>Save Cancel</div>			
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer ▼	Private ▼	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write ▼	Private ▼	<input checked="" type="checkbox"/>
Order	Controlled by Parent ▼	Controlled by Parent ▼	<input checked="" type="checkbox"/>
Contact	Controlled by Parent ▼	Controlled by Parent ▼	<input checked="" type="checkbox"/>
Asset	Controlled by Parent ▼	Controlled by Parent ▼	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write ▼	Private ▼	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer ▼	Private ▼	<input checked="" type="checkbox"/>
Campaign	Public Full Access ▼	Private ▼	<input checked="" type="checkbox"/>
Campaign Member	Controlled by Campaign ▼	Controlled by Campaign	<input checked="" type="checkbox"/>
User	Public Read Only ▼	Private ▼	<input checked="" type="checkbox"/>
Individual	Public Read/Write ▼	Private ▼	<input checked="" type="checkbox"/>
Voice Call	Private ▼	Private	<input checked="" type="checkbox"/>
Activity	Private ▼	Private	<input checked="" type="checkbox"/>
Calendar	Hide Details and Add Events ▼	Hide Details and Add Events	<input checked="" type="checkbox"/>
Price Book	Use ▼	Use	<input checked="" type="checkbox"/>
Product	Public Read/Write ▼	Public Read/Write ▼	<input checked="" type="checkbox"/>
Agent Work	Public Read Only ▼	Private ▼	<input checked="" type="checkbox"/>
Alternative Payment Method	Private ▼	Private ▼	<input checked="" type="checkbox"/>
Analytics User Attribute Function Token	Public Read Only ▼	Private ▼	<input checked="" type="checkbox"/>

6. Field-Level Security (FLS)

- Controls **visibility and edit permissions** for fields.
- Sensitive fields (e.g., Well_Being_Score__c) visible only to HR/Leadership, read-only for employees.
- Configured through **Object Manager** → **Fields & Relationships** → **Set Field-Level Security**.

The screenshot shows the 'Object Manager' interface for configuring Field-Level Security (FLS) for the 'Metric Name' field. The 'Profile' is set to 'Contract Manager'. The 'Visible' checkbox is checked, and the 'Read-Only' checkbox is unchecked. Below this, the 'Page Layout' section shows the 'Analytics Metric Layout' is selected. A table below the page layout section shows the record types assigned to the page layout for the 'Metric Name' field. The table has columns for 'Profiles', 'Record Types' (Master, Attrition Risk Metrics, Engagement Metrics, Productivity Metrics), and checkboxes for 'Visible', 'Read-Only', and 'Required'.

Profiles	Record Types	Visible	Read-Only	Required
Analytics Cloud Integration User	Master	✓	✓	✓
Analytics Cloud Security User	Attrition Risk Metrics	✓	✓	✓
	Engagement Metrics	✓	✓	✓
	Productivity Metrics	✓	✓	✓


7. Session Settings

- **Timeout:** 15–30 minutes for internal users, 10–15 minutes for external users.
- **Force Logout on Browser Close:** Enabled.
- **Lock Sessions to IP Address:** Enabled for corporate VPN.
- **Multi-Factor Authentication (MFA):** Required for HR and leadership profiles.

The screenshot shows the 'Session Settings' configuration page. The 'Session Timeout' section has a 'Timeout Value' dropdown set to '2 hours'. Below this, there are checkboxes for 'Disable session timeout warning popup' (unchecked) and 'Force logout on session timeout' (checked). The 'Session Settings' section has checkboxes for 'Lock sessions to the IP address from which they originated' (checked), 'Lock sessions to the domain in which they were first used' (checked), 'Terminate all of a user's sessions when an admin resets that user's password' (unchecked), 'Force relogin after Login-As-User' (checked), 'Require HttpOnly attribute' (unchecked), 'Use POST requests for cross-domain sessions' (unchecked), 'Enforce login IP ranges on every request' (unchecked), and 'When embedding a Lightning application in a third-party site, use a session token instead of a session cookie.' (unchecked).

8. Login IP Ranges

- Restrict logins to **trusted IP addresses** to prevent unauthorized access.
- External users restricted to portal IPs only.

 **SETUP**
Login Access Policies

Login Access Policies

Control which support organizations your users can grant login access to.

Manage Support Options			Save	Cancel
Setting		Enabled		
Administrators Can Log in as Any User		<input checked="" type="checkbox"/>		
Support Organization	Packages	Available to Users		
Salesforce.com Support		<input type="radio"/>		
			Save	Cancel

Phase 9 Status: Completed Successfully

Next Steps:

- Proceed to **Final Phase : Final Presentation & Demo Day.**
- Begin testing Presentation, Demo, LinkedIn/Portfolio, Feedback.. etc

Phase 9 Completion Document.
