

PHASE - 9

Project: AI-Powered HR & Employee Management Bot

Reports (Tabular, Summary, Matrix, Joined)

Salesforce reports help HR understand **leave trends, attendance patterns, and employee status**.

1.1 Tabular Report (Basic List)

📌 **Use case:** List all active employees.

Steps:

1. Go to **Reports → New Report**
2. Select **Employee** report type
3. Choose **Tabular**
4. Add fields:
 - Employee Name
 - Employee ID
 - Department
 - Status
5. Filter:
 - Status = Active
6. Save as:
 - **Active Employees List**

✓ Simple, fast, exportable

1.2 Summary Report (Grouped Data)

📌 **Use case:** Leaves grouped by department.

Steps:

1. New Report → **Leaves**
2. Choose **Summary**
3. Group Rows by:
 - Department
4. Add fields:
 - Leave Type
 - Approval Status
5. Add Row Count

6. Save as:
 - **Department-Wise Leave Summary**

✓ Used in dashboards

1.3 Matrix Report (Rows + Columns)

✦ **Use case:** Attendance status per month.

Steps:

1. New Report → **Attendance**
2. Choose **Matrix**
3. Group Rows:
 - Employee Name
4. Group Columns:
 - Attendance Month
5. Add Summary:
 - Attendance Count
6. Save as:
 - **Monthly Attendance Matrix**

✓ Good for trend analysis

1.4 Joined Report (Multiple Objects)

✦ **Use case:** Employee + Leave + Attendance overview.

Steps:

1. New Report → Joined Report
2. Block 1:
 - Employee fields
3. Block 2:
 - Leave fields
4. Block 3:
 - Attendance fields
5. Group by Employee Name
6. Save as:
 - **Employee 360 Report**

✓ Advanced reporting (impresses evaluators)

Report Types (Custom Report Types)

Custom report types allow **cross-object reporting**.

Example: Employee with Leave

Steps:

1. Setup → Report Types
2. New Custom Report Type
3. Primary Object:
 - Employee
4. Related Object:
 - Leave (A employee may or may not have leaves)
5. Deployment Status: Deployed
6. Save

✦ Enables:

- Employee without leave
- Employee with leave analysis

Dashboards (Visual Insights)

Dashboards convert reports into **charts & KPIs**.

3.1 HR Dashboard

Steps:

1. Go to **Dashboards → New**
2. Name: **HR Analytics Dashboard**
3. Add components:
 - Pie Chart → Leave by Department
 - Bar Chart → Monthly Attendance
 - Donut Chart → Employee Status
 - Table → Pending Leave Approvals
4. Save

✓ Used by HR Managers

3.2 Manager Dashboard

Components:

- Team Attendance
- Pending Approvals
- Leave Trends

✦ Uses filtered reports

Dynamic Dashboards (Role-Based View)

Dynamic dashboards show **data based on logged-in user**.

Steps:

1. Open Dashboard
2. Click **Edit**
3. Set:
 - View Dashboard As → **The logged-in user**
4. Save

📌 Example:

- Manager sees **only their team**
- Employee sees **only their data**

⚠️ Salesforce limit:

- Enterprise: 5 dynamic dashboards
- Developer org: 3

Sharing Settings (Data Access Control)

Controls **who can see whose data**.

Step-by-step

1. Setup → Sharing Settings
2. For Custom Objects:
 - Employee → **Private**
 - Leave → **Private**
 - Attendance → **Private**
3. Enable:
 - Grant Access Using Hierarchies (for managers)

📌 Result:

- Employees see only their data
- Managers see team data
- HR sees all

Field Level Security (FLS)

Protect sensitive HR fields.

Example Fields:

- Salary__c
- Performance_Rating__c

Steps:

1. Setup → Object Manager → Employee
2. Fields & Relationships
3. Open field → Set Field-Level Security
4. Access:
 - HR → Read/Write
 - Manager → Read Only
 - Employee → Hidden

📌 Critical for HR compliance

Session Settings (Security Hardening)

Controls session behavior.

Steps:

1. Setup → Session Settings
2. Enable:
 - Lock sessions to IP address
 - Logout on session timeout
 - Disable clickjack protection ❌ (keep enabled)
3. Set:
 - Session Timeout: 30–60 minutes
4. Save

✓ Reduces session hijacking risk

Login IP Ranges (Restrict Access)

Restrict login from known IPs.

Steps:

1. Setup → Profiles
2. Open Profile → Login IP Ranges
3. Add:
 - Start IP
 - End IP
4. Save

📌 Example:

- HR can login only from office network

Audit Trail (Security Monitoring)

Tracks admin-level changes.

Steps:

1. Setup → View Setup Audit Trail
2. Review:
 - Permission changes
 - Object edits
 - Security updates
3. Export audit trail (CSV)

✂️ Required for compliance & security review

◆ Phase 9 Architecture Flow

Salesforce Data



Reports (Tabular / Summary / Matrix / Joined)



Dashboards (Dynamic)



Security Controls



Final Review & Deployment