

Phase 9: Reporting, Dashboards & Security Review

Goal:

- Track progress through reports and dashboards
 - Protect sensitive data from unauthorized access
 - Ensure stakeholders see the right information in real time
-

Step 1: Reporting

Reports help track Youth, Jobs, and Interviews effectively.

A. Create Reports

1. Go to **App Launcher → Reports → New Report**
2. Select the report type: e.g., **Interview** or **Custom Report**
3. Add fields:
 - Candidate Name (Youth__c Name)
 - Job Title (Job__c Name)
 - Interview Date (Interview_Date__c)
 - Status (Status__c)
4. Save & Run the report

B. Useful Reports

- **Interviews by Status** → Group by Status__c (Shows Scheduled vs Completed interviews)
- **Interviews by Result** → Group by Result__c (Shows Qualified, Shortlisted, Rejected outcomes)
- **Interviews Over Time** → Group by Last Interview Date (Shows trends or frequency of interviews)

CareerBridge

Report Interviews

Interviews Report

Total Records: 6

Status	Result	Interview Date	Candidate Name	Job
Scheduled (2)	- (2)	9/16/2025 (1)	YID-0009	Developer
		Subtotal		
		9/16/2025 (1)	YID-0001	Java Developer
		Subtotal		
Completed (4)	Qualified (1)	9/16/2025 (1)	YID-0009	Developer
		Subtotal		
	Rejected (2)	9/13/2025 (2)	YID-0009	designer
		YID-0009	Developer	
		Subtotal		
	Shortlisted (1)	9/21/2025 (1)	YID-0009	designer
		Subtotal		
		Subtotal		
		Total (6)		

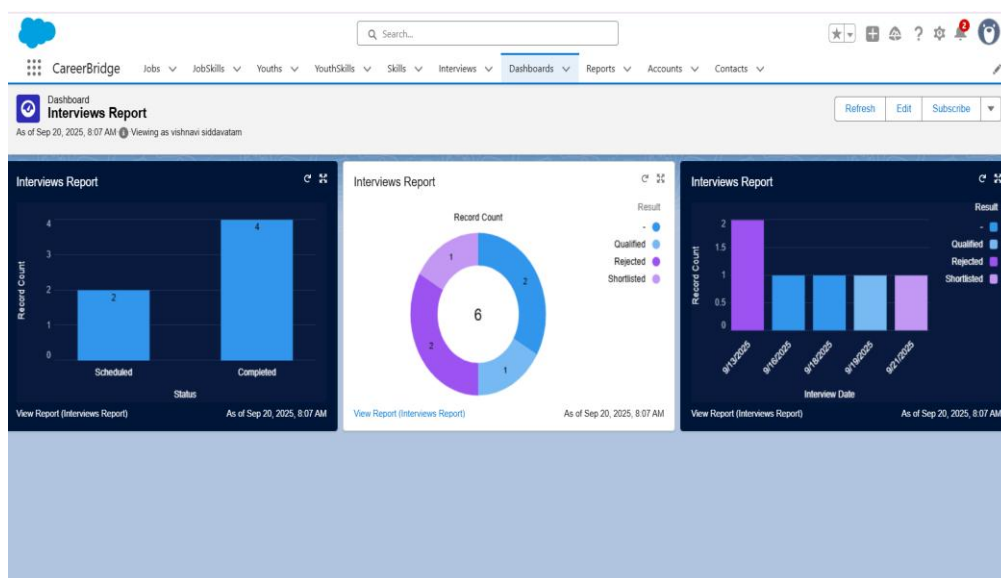
Row Counts: ☐ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

Step 2: Dashboards

Dashboards visually display metrics from reports.

A. Create Dashboard

- Go to **App Launcher** → **Dashboards** → **New**
- Add components:
 - Metric:** Count of Completed Interviews
 - Bar Chart:** Interviews by Status
 - Line Chart:** Interviews per Week
 - Table:** Recent Interviews
- Enable **Dynamic Dashboards** → Set **“View Dashboard As = Dynamic”**

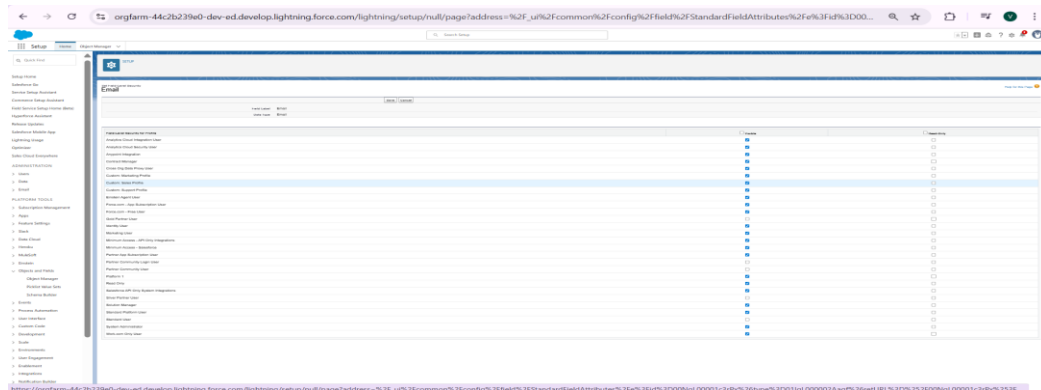


Step 3: Security

Protect sensitive data (like Youth emails, interview feedback) and control who can see what.

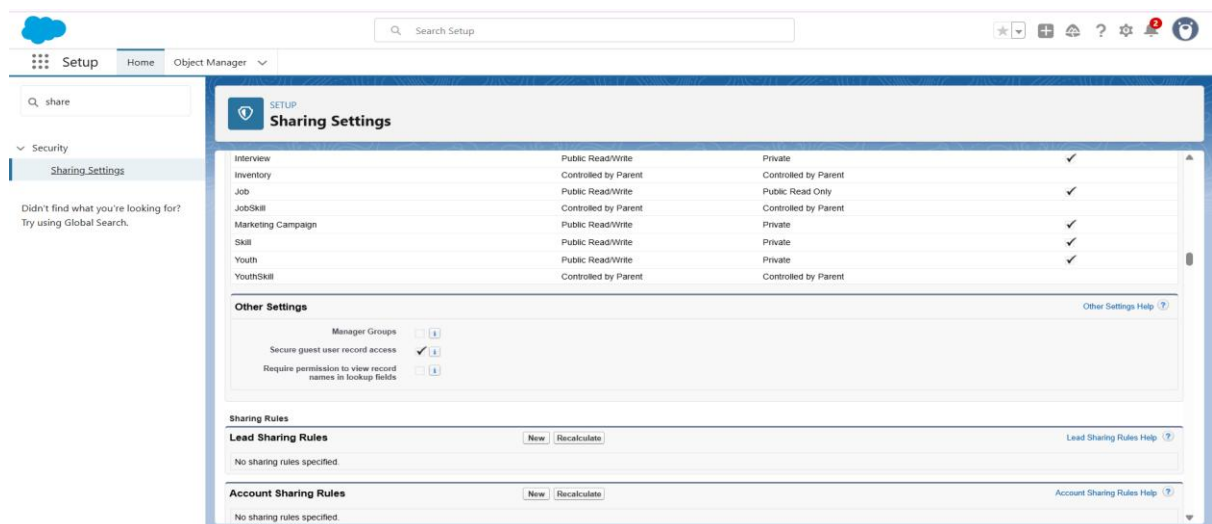
A. Field-Level Security (FLS)

1. Setup → Object Manager → Youth__c → Fields → Email__c → Set Field-Level Security
2. Hide fields from standard users or users without permission



B. Sharing & Org-Wide Defaults (OWD)

1. Setup → Sharing Settings
2. Ensure Youth__c = Private



C. Audit Trail

1. Setup → View Setup Audit Trail
2. Track unauthorized changes or admin activity



Search Setup



Setup Home Object Manager

view

- Feature Settings
 - Sales
 - Contact Intelligence [View](#)
 - Setup
 - Lead Intelligence [View](#)
 - Salesforce Files
 - Regenerate [Previews](#)
 - Process Automation
 - Paused And Failed Flow [Interviews](#)
 - User Interface
 - Record Page Settings
 - Custom Code
 - Canvas App [Previewer](#)
 - Environments
 - System [Overview](#)
 - Security
 - [View Setup Audit Trail](#)

View Setup Audit Trail

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The last 20 entries for your organization are listed below. You can [download](#) your organization's setup audit trail for the last six months (Excel .csv file).

View Setup Audit Trail					
Date	User	Source Namespace Prefix	Action	Section	Delegate User ?
9/19/2025, 7:48:25 PM PDT	yishnavi709955@agentforce.com		Changed AutoInterviewScheduler Apex Class code	Apex Class	
9/19/2025, 7:48:09 PM PDT	yishnavi709955@agentforce.com		Created AutoInterviewScheduler Apex Class code	Apex Class	
9/19/2025, 7:41:48 PM PDT	yishnavi709955@agentforce.com		Deleted AutoInterviewScheduler Apex Class code	Apex Class	
9/19/2025, 7:41:37 PM PDT	yishnavi709955@agentforce.com		Deleted AutoInterviewScheduler.Job Apex Class code	Apex Class	
9/19/2025, 7:40:15 PM PDT	yishnavi709955@agentforce.com		Created AutoInterviewScheduler.Job Apex Class code	Apex Class	
9/19/2025, 4:21:08 AM PDT	salesforce.com, inc.		Max number of streaming topics		
9/16/2025, 9:19:55 AM PDT	yishnavi709955@agentforce.com		Changed JobMatchingControllerTest Apex Class code	Apex Class	
9/16/2025, 9:19:05 AM PDT	yishnavi709955@agentforce.com		Changed JobMatchingControllerTest Apex Class code	Apex Class	
9/16/2025, 8:53:23 AM PDT	yishnavi709955@agentforce.com		Changed AutoInterviewScheduler Apex Class code	Apex Class	
9/16/2025, 8:53:08 AM PDT	yishnavi709955@agentforce.com		Created AutoInterviewScheduler Apex Class code	Apex Class	
9/16/2025, 8:04:44 AM PDT	yishnavi709955@agentforce.com		Changed JobMatchingController Apex Class code	Apex Class	