

Student Management System

Phase 9: Reports, Dashboards & Security Review

Overview

Phase 9 transforms raw data into actionable insights. Reports and dashboards enable stakeholders to make informed decisions about enrollment trends, financial performance, and resource allocation. Your implementation includes both financial reports and enrollment analytics.

9.1 My Reports: Implementation & Purpose

Report 1: Fees Collected per Student

Purpose: Show total fees paid by each student

Configuration:

- 1. Go to Reports → New Report
- 2. Choose: Payment__c (Report Type)
- 3. Filter Criteria: Status = "Received" (only count successful payments)
- 4. Grouping: Primary Group: Payment__c.Student__r.Name
- 5. Summary Fields: Sum of Amount_Paid__c
- 6. Save as: Fees_Collected_per_Student

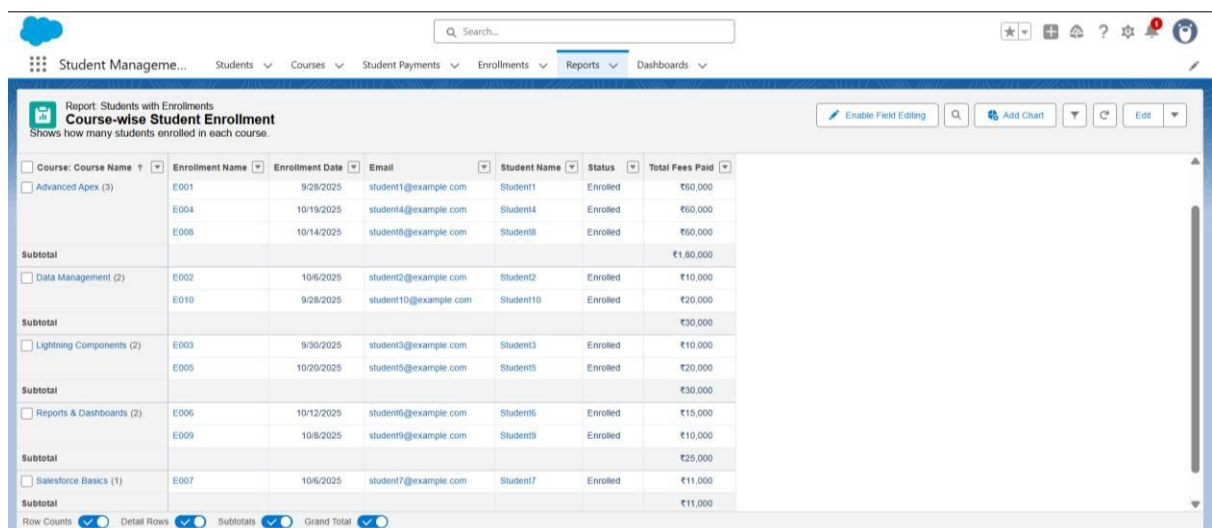
Student Name	Payment Name	Amount Paid	Payment Date	Mode of Payment
Student6 (1)	Sports Fees	₹15,000	9/29/2025	UPI
Subtotal		₹15,000		
Student5 (1)	Bus Fee	₹20,000	10/5/2025	UPI
Subtotal		₹20,000		
Student4 (1)	Tuition Fees	₹60,000	9/30/2025	Card
Subtotal		₹60,000		
Student3 (1)	CRT Training Fee	₹10,000	10/28/2025	UPI
Subtotal		₹10,000		
Student2 (1)	Books fees	₹10,000	10/9/2025	Cash
Subtotal		₹10,000		
Student10 (1)	Bus fees	₹20,000	9/28/2025	Cash
Subtotal		₹20,000		
Student1 (1)	Tuition Fees	₹60,000	8/31/2025	Cash
Subtotal		₹60,000		
Total (10)		₹2,76,000		

Report 2: Students per Course

Purpose: Track enrollment distribution across courses

Configuration:

1. Go to Reports → New Report
2. Choose: Enrollment__c (Report Type)
3. Grouping:
 - Primary Group: Enrollment__c.Course__r.Name
4. Summary Fields:
 - Count of Enrollments (shows student count per course)
5. Filters:
 - Status = "Active" (only active enrollments)
6. Save as: Students_per_Course



Course: Course Name	Enrollment Name	Enrollment Date	Email	Student Name	Status	Total Fees Paid
Advanced Apex (3)	E001	9/28/2025	student1@example.com	Student1	Enrolled	€50,000
	E004	10/19/2025	student4@example.com	Student4	Enrolled	€50,000
	E008	10/14/2025	student8@example.com	Student8	Enrolled	€60,000
Subtotal						€1,80,000
Data Management (2)	E002	10/5/2025	student2@example.com	Student2	Enrolled	€10,000
	E010	9/28/2025	student10@example.com	Student10	Enrolled	€20,000
Subtotal						€30,000
Lightning Components (2)	E003	9/30/2025	student3@example.com	Student3	Enrolled	€10,000
	E005	10/29/2025	student5@example.com	Student5	Enrolled	€20,000
Subtotal						€30,000
Reports & Dashboards (2)	E006	10/12/2025	student6@example.com	Student6	Enrolled	€15,000
	E009	10/5/2025	student9@example.com	Student9	Enrolled	€10,000
Subtotal						€25,000
Salesforce Basics (1)	E007	10/6/2025	student7@example.com	Student7	Enrolled	€11,000
Subtotal						€11,000
Grand Total						€11,000

9.2 Dashboard Creation & Components

Dashboard: Student Fee Dashboard (Your Implementation)

Purpose: Executive view of financial performance

Components Added:

Component 1: Fees Collected per Student (Bar Chart)

- Source Report: Fees_Collected_per_Student
- Chart Type: Bar Chart
- X-Axis: Student Name

- Y-Axis: Sum of Amount_Paid__c
- Benefit: Quickly see top payers and outstanding debtors

Component 2: Students per Course (Pie Chart)

- Source Report: Students_per_Course
- Chart Type: Pie Chart
- Show: Student Count per Course
- Benefit: See enrollment distribution at a glance

Dashboard Configuration Steps:

9.2.1 Go to Dashboards → New Dashboard

9.2.2 Name: Student Fee Dashboard

9.2.3 Add Component:

9.2.3.1 Click "+ Component"

9.2.3.2 Select Chart Type: Bar

9.2.3.3 Select Report: Fees_Collected_per_Student

9.2.3.4 Configure X/Y axes

9.2.4 Repeat for additional components

9.2.5 Save & Run

