Library Management **Phase 9:**

Reporting, Dashboards & Security Review

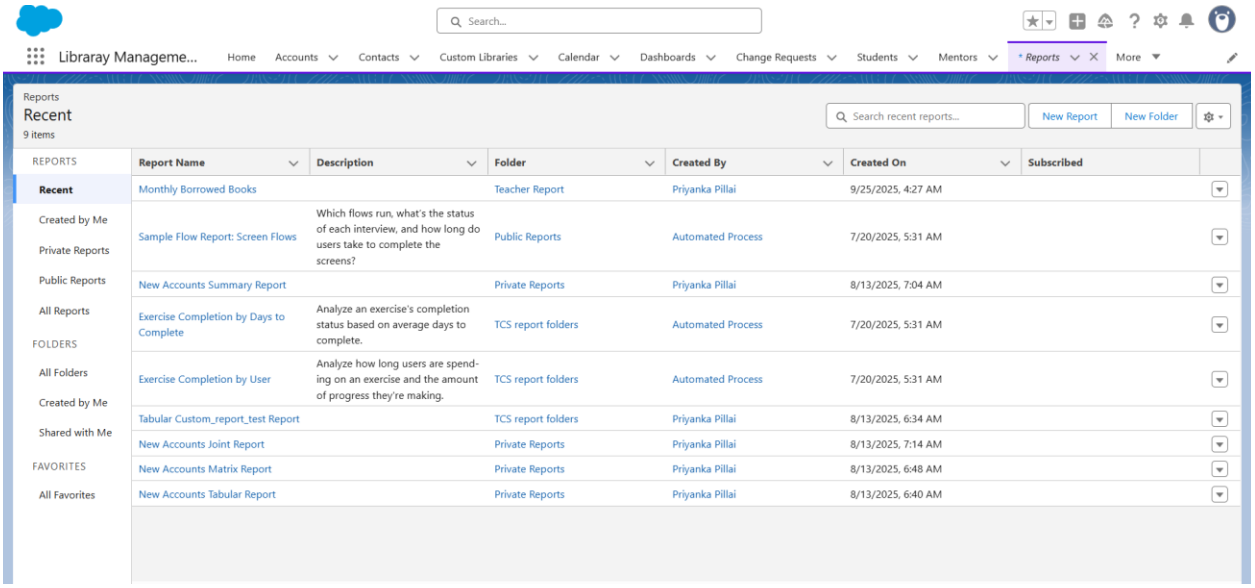
Step 1: Reporting

A **Report** is a list or summary of records in Salesforce that helps you analyze library data.

- Reports let you **filter, sort, group, and summarize** your Library Management data.
- **Example:** You can create a report to see all books borrowed this month or the top books borrowed by Teachers vs. Students.

Steps

- **Go to the App Launcher → search "Reports" → click Reports.**
- **Click "New Report" - Monthly Borrowed Books.**
- **Select the Report Type** - Teacher
- **Click Continue.**
- **Add Filters**
- **Add Columns**
- **Group Data (optional)**
  - *Example:* Group Borrow Requests by Book or by Member (Teacher/Student).
- **Summarize (optional)**
  - Add totals, averages, or counts (like total borrowed books per Teacher).
- **Click Save & Run** → Give the report a name→ Choose a folder to save it in.



Report Name	Description	Folder	Created By	Created On	Subscribed
Monthly Borrowed Books		Teacher Report	Priyanka Pillai	9/25/2025, 4:27 AM	
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	7/20/2025, 5:31 AM	
New Accounts Summary Report		Private Reports	Priyanka Pillai	8/13/2025, 7:04 AM	
Exercise Completion by Days to Complete	Analyze an exercise's completion status based on average days to complete.	TCS report folders	Automated Process	7/20/2025, 5:31 AM	
Exercise Completion by User	Analyze how long users are spending on an exercise and the amount of progress they're making.	TCS report folders	Automated Process	7/20/2025, 5:31 AM	
Tabular Custom_report_test Report		TCS report folders	Priyanka Pillai	8/13/2025, 6:34 AM	
New Accounts Joint Report		Private Reports	Priyanka Pillai	8/13/2025, 7:14 AM	
New Accounts Matrix Report		Private Reports	Priyanka Pillai	8/13/2025, 6:48 AM	
New Accounts Tabular Report		Private Reports	Priyanka Pillai	8/13/2025, 6:40 AM	

Step 2: Dashboards

What it is:
A Dashboard is a visual board that displays charts, numbers, and tables built from your Reports. It helps Teachers, Librarians and Management instantly see performance trends (for example: most borrowed books, top students, pending returns).

Dashboard Components You Can Add

- **Charts** – Bar, Pie, Line charts to show trends.
- **Gauges** – Show progress toward a target (e.g. % of books returned on time).
- **Metrics** – One key number (e.g. total borrowings this month).
- **Tables** – Raw report data in a grid.

Steps (Click by Click)

- **Go to the App Launcher → type "Dashboards" → click Dashboards.**
- **Click "New Dashboard".**
- **Enter Dashboard Name** – e.g. Library Performance Dashboard or Teacher Engagement Dashboard.
- **Choose a Folder** (select the folder you created earlier for Reports/Dashboards).

- **Click “Create”.**
- **Click “+ Component”** (to add your first chart, metric or table).
- **Select a Report** you already built (for example: “Books Borrowed This Month” or “Top Students”).
- **Choose Visualization Type:**
- Bar Chart
- Pie Chart
- Gauge
- Metric
- Table

Configure Data Display:

- Choose which fields, groupings, and filters you want for this chart or metric.

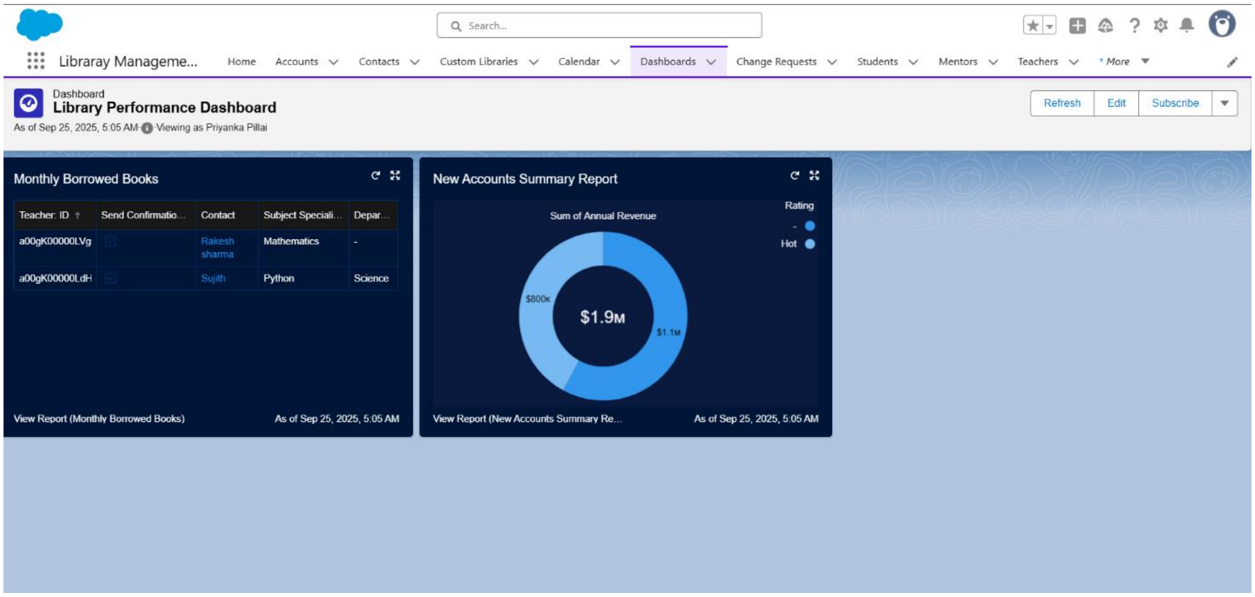
Click “Add”.

Repeat “+ Component” for more charts/metrics if needed.

Click “Save” → then “Done”.

Click “Refresh” anytime to pull in the latest data.

Result:
Your dashboard now shows live numbers and visuals from your Salesforce reports for Teachers, Students and Librarians.



Step 3: Field-Level Security

What it is:

Field-Level Security controls who can see or edit individual fields on a record.

It protects sensitive data like Teacher Contact, Student DOB, Library Fines, Book Costs, etc., so only the right roles can view or update them.

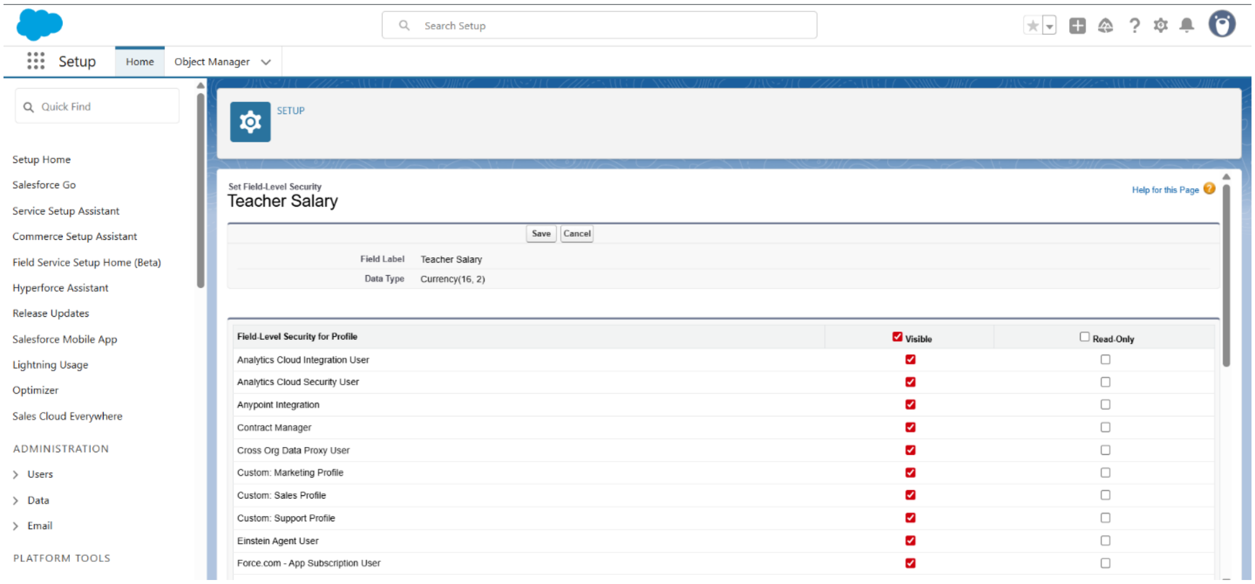
Steps (Click by Click)

- Go to Setup → Object Manager.
- Select your Object (example: Student or Teacher or Book).
- Click “Fields & Relationships”.
- Click the field you want to protect (example: Student DOB).
- Click “Set Field-Level Security”.
- For each Profile:
- Visible → can see the field.
- Read-Only → can see but cannot edit.
- Hidden → cannot see at all.
- (Example: For Student DOB → Visible to Teacher & Librarian profiles, Hidden for Student profile.)
- Click “Save”.

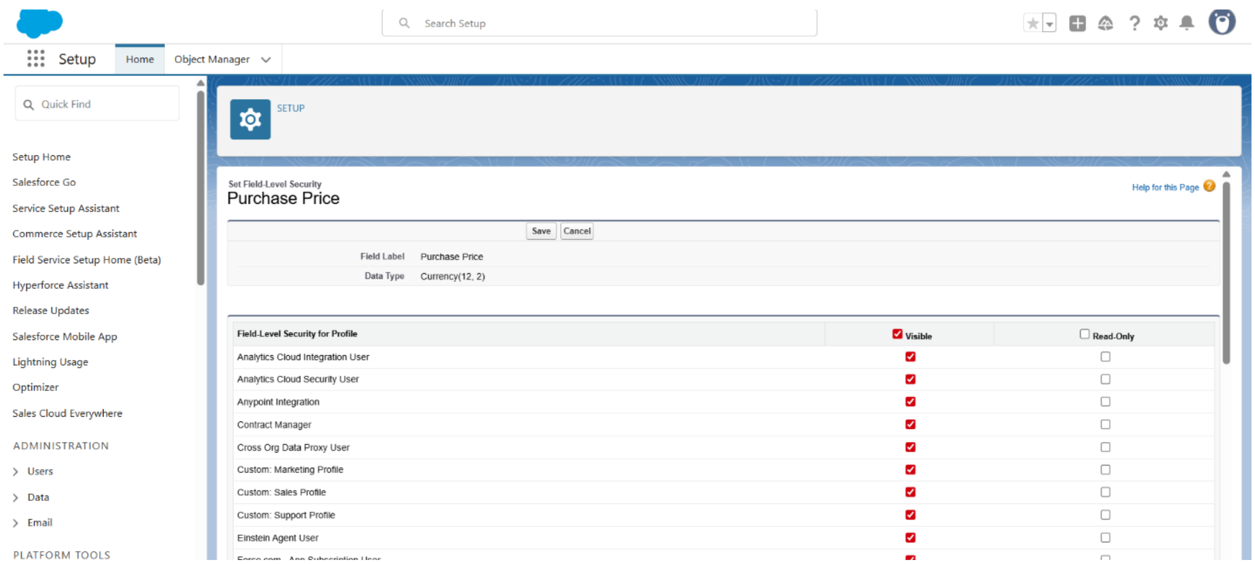
- Repeat steps 4–7 for other sensitive fields like Teacher Salary, Book Purchase Price, Library Fine Amount, etc.

- Result:
- Only authorized roles (Teacher, Librarian, Admin) can view or edit those sensitive fields. Students or other profiles see nothing or read-only according to your settings.

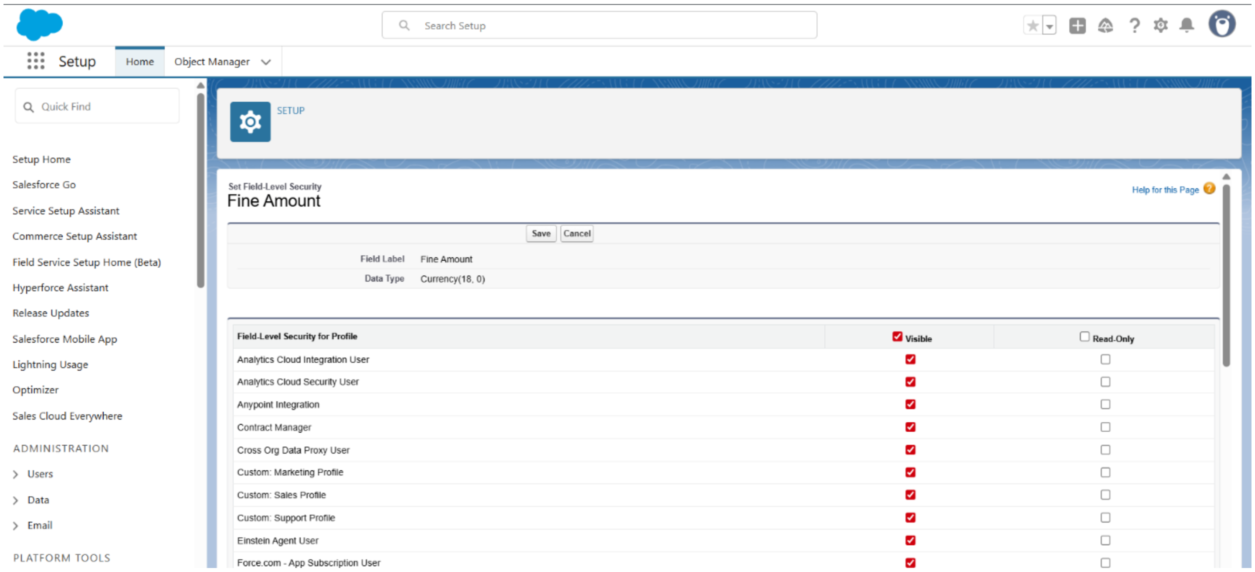
- Setup → Object Manager → Teacher → Fields & Relationships → New.
- Choose Field Type = Currency → Next.
- Field details:
- Field Label: Teacher Salary
- Field Name: Teacher_Salary__c
- Length / Decimal Places: choose e.g. 16,2 (or your org standard)
- Help Text: Annual salary in local currency. Visible to Admin only.
- Description: Stores salary for payroll/audit
- Click Next.
- Set Field-Level Security (during creation)
- On the Set Field-Level Security screen (shown while creating), pick visibility per profile:
- visible for all
- Click Next.
- Add to Page Layouts
- Choose page layouts where the field appears (usually Admin layouts only) → Save.



- Setup → Object Manager → Student → Fields & Relationships → New.
- Field Type = Currency → Next.
- Field details:
- Field Label: Purchase Price
- Field Name: Purchase_Price__c
- Length/Decimals: e.g., 12,2
- Help Text: Cost price of the book — visible to Librarians & Admins.
- Click Next.
- Set Field-Level Security (during creation)
- Choose visibility: all
- Next → Add to relevant Page Layout(s) → Save



- Setup → Object Manager → Student → Fields & Relationships → New.
- Field Type = Currency → Next.
- Field details:
- Field Label: Fine Amount
- Field Name: Fine_Amount__c
- Help Text: Fine charged for overdue returns — visible to Librarians only.
- Click Next.
- Set Field-Level Security
- Visibility choices: for all
- Next → Add to Page Layout(s) → Save.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Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
SETUP
Set Field-Level Security
Fine Amount
Help for this Page
Save
Cancel
Field Label
Fine Amount
Data Type
Currency(18, 0)
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
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