SafeCity Salesforce Project:

Phase 9: Reporting, Dashboards & Security Review

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1. Reports

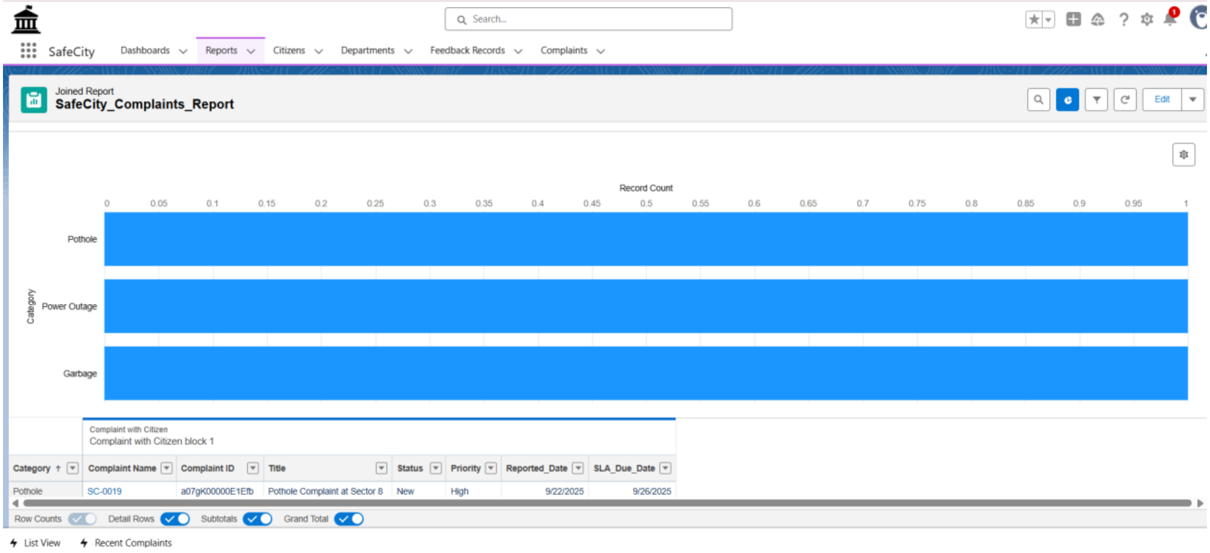
Purpose: Analyze and summarize complaint data for operational insights.

Reports Created:

1. **Tabular Report** – Lists all complaints with key fields: Title, Category, Priority, Status, Assigned To.
2. **Summary Report** – Grouped by **Category** to count complaints per category.
3. **Matrix Report** – Rows = Priority, Columns = Status; shows distribution of complaints across priority and status.
4. **Pie Chart Report** – Summary report grouped by **Category**; used in dashboards to visualize complaint distribution.

Documentation Notes:

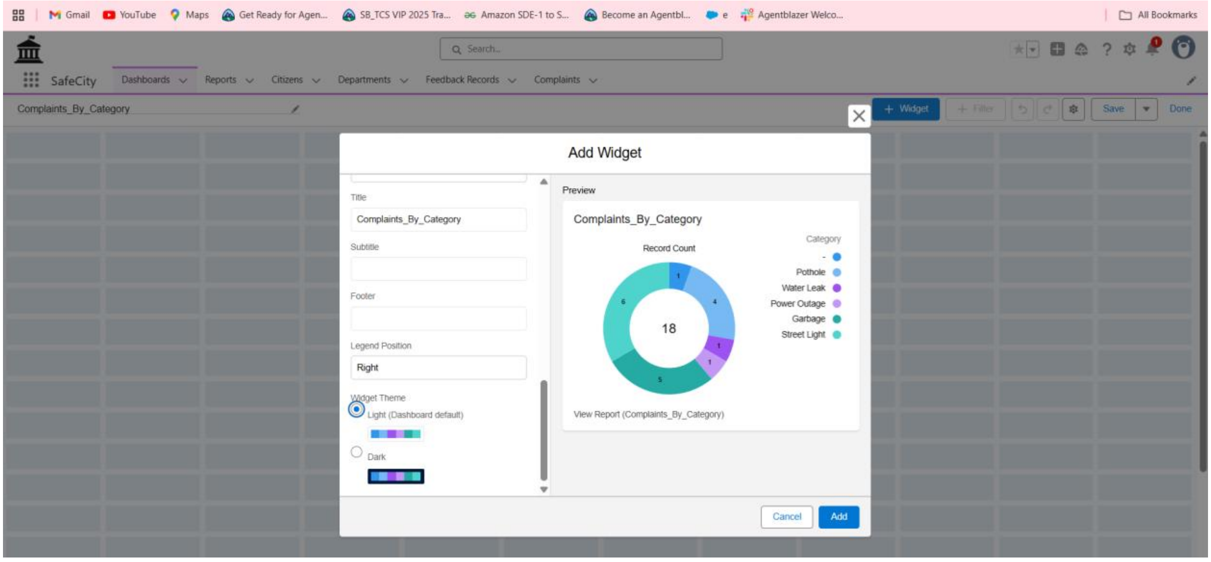
- Include screenshots of each report type.
- List filters used, e.g., Status = New / In Progress, Priority = High.
- Describe the purpose of each report.



Complaint with Citizen

Complaint with Citizen block 1

Category ↑	Complaint Name	Complaint ID	Title	Status	Priority	Reported_Date	SLA_Due_Date
Pothole	SC-0019	a07gK00000E1Efb	Pothole Complaint at Sector 8	New	High	9/22/2025	9/26/2025



Complaints_By_Category

Add Widget

Title: Complaints_By_Category

Subtitle

Footer

Legend Position: Right

Widget Theme

● Light (Dashboard default)

○ Dark

Complaints_By_Category

View Report (Complaints_By_Category)

2. Dashboards

Purpose: Visualize complaint metrics and trends for quick decision-making.

Dashboard Created: SafeCity_Complaints_Dashboard

Components Added:

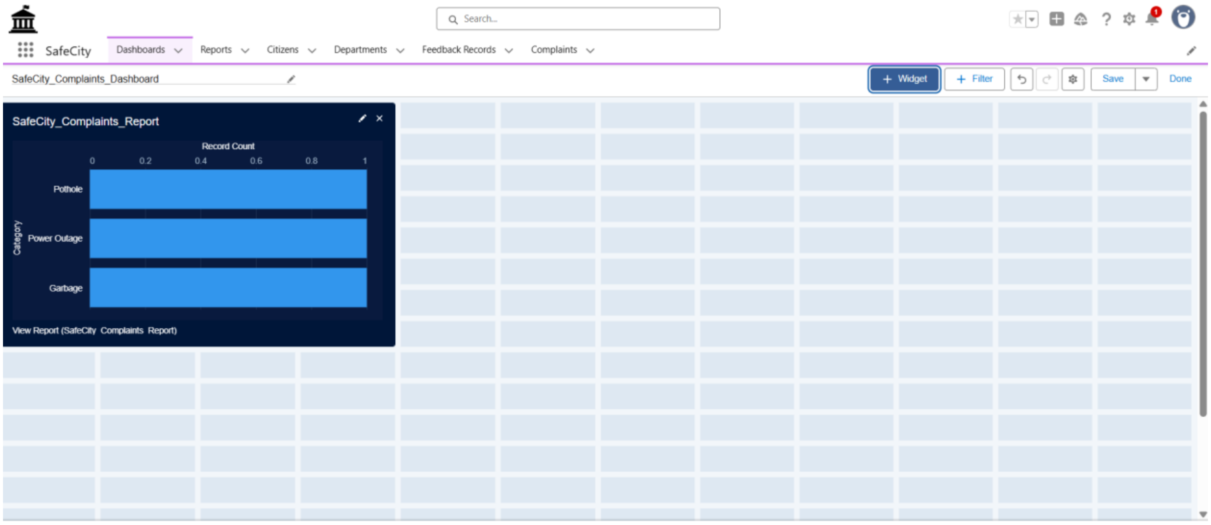
- **Pie Chart:** Complaints by Category
- **Gauge:** SLA Overdue Complaints
- **Table:** High Priority Complaints assigned to staff
- **Dynamic Dashboard:** Users see data according to their profile (Staff sees only assigned complaints, Supervisors see all).

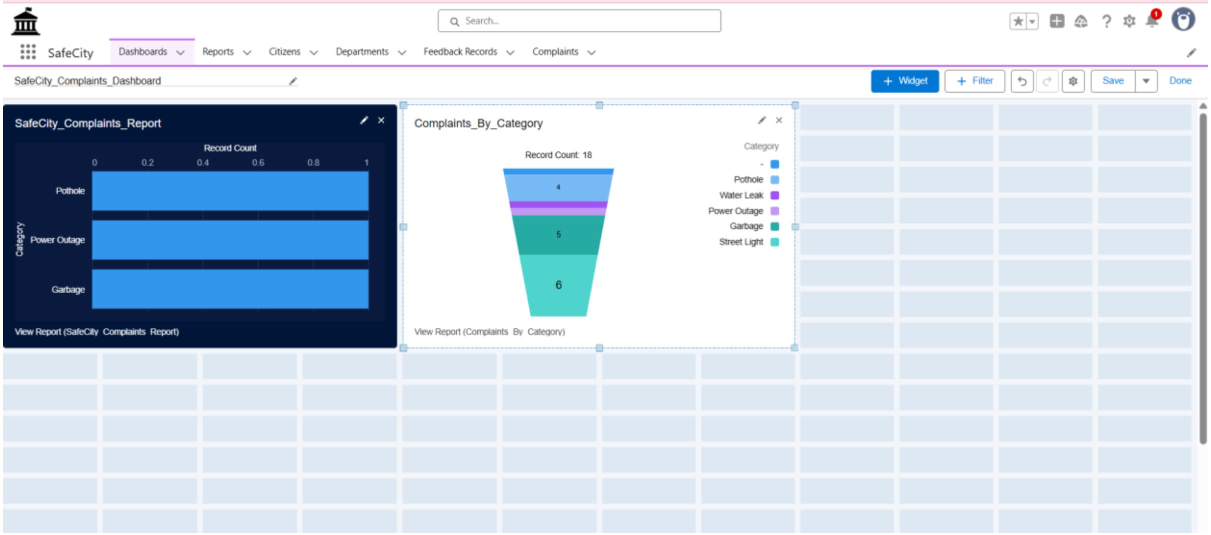
Home Page Integration:

- Dashboard added to standard Home Page.
- Other components added:
  - Recent Complaints list
  - Report Chart for key metric
  - Rich Text / Announcements
  - Quick Actions for creating or escalating complaints

Documentation Notes:

- Screenshots of dashboard and components.
- Short explanation of purpose of each component.





3. Security & Access Review

a) Sharing Settings

- Organization-Wide Defaults (OWD): **Private** for Complaint__c and Citizen__c.
- Sharing Rules: Automatically share complaints with the assigned staff.
- Ensures users see only the records they are authorized to access.

b) Field-Level Security

- Sensitive fields (e.g., Citizen Email, Resolution Details) restricted to authorized profiles only (Admin, Supervisor).

c) Session Settings & Login IP Ranges

- Session Timeout: 30 minutes
- Login IP Ranges: Allowed for internal staff network (optional in Developer Edition).

d) Audit Trail

- Tracks all changes to Setup and configuration.
- Ensures accountability and compliance.
- Useful for reviewing who modified components and data access rules.

Documentation Notes:

- Screenshots of Sharing Settings and Field-Level Security
- Screenshot of session settings and login IP ranges
- Screenshot of audit trail entries