Smart College CRM – Student Management System on Salesforce

Phase 9: Reporting, Dashboards & Security Review – Smart College CRM

**🔹 Objective**

To build **reports and dashboards** that provide insights into **student enrollment, fee collection, academic performance, and faculty workload**, while ensuring **data security and compliance** across the Smart College CRM system.

**🔹 Reports**

Types of reports created:

1. **Tabular Reports** → List of all students enrolled in a specific course.
2. **Summary Reports** → Group fees by status (Paid, Pending, Overdue).
3. **Matrix Reports** → Compare student enrollment by **Department\_\_c vs Semester\_\_c**.
4. **Joined Reports** → Show student details with exam results and fee status side-by-side.

**Sample Reports:**

* Students by Course & Department.
* Fee Status by Course & Semester.
* Exam Results by Student & Subject.
* Faculty Teaching Load Report (Faculty vs Number of Courses).

**🔹 Dashboards**

Dashboards combine multiple reports into **visual insights** for different users.

**Key Dashboard Components:**

1. **Fee Collection by Department** (Bar Chart).
2. **Paid vs Pending Fees** (Donut Chart).
3. **Student Enrollment Trends by Semester** (Line Chart).
4. **Average Exam Results by Course** (Gauge).

* Dashboards are scheduled for **daily refresh**.
* **Role-based dashboards** for Admin, Faculty, and Students.

**🔹 Dynamic Dashboards**

* Dashboards run as the **logged-in user**.
* **Faculty** → See only their assigned courses and student records.
* **Admin** → See all student, course, and fee data.
* **Student** → See only their performance, attendance, and fee status.

**🔹 Security Review**

1. **Sharing Settings (OWD)**
   * **Student\_\_c** → Private (students see only their own records).
   * **Course\_\_c** → Public Read Only (all can view, only faculty/admin edit).
   * **Fee\_\_c** → Private (student sees only their fee details).
   * **Exam\_\_c** → Controlled by Parent (linked to Student\_\_c).
2. **Field-Level Security (FLS)**
   * **Fee Amount** → Visible to Admin & Finance, hidden from Students.
   * **Student Personal Info (Phone, Address)** → Visible to Admin & Faculty, hidden from peers.
   * **Exam Grading Notes** → Visible only to Faculty.
3. **Session Settings**
   * Students → Timeout: **30 mins**.
   * Faculty → Timeout: **1 hour**.
   * Admin → Timeout: **2 hours**.
   * **HTTPS, MFA, and clickjack protection** enabled.
4. **Login IP Ranges**
   * **Admin** → Restricted to college campus IP range.
   * **Faculty/Students** → Wider access (for remote learning).
5. **Audit Trail**
   * **Setup Audit Trail** → Tracks configuration changes.
   * **Field History Tracking** → Applied on Fee Status, Exam Scores, and Course Enrollment.
   * **Login History** → Monitored for suspicious logins.

**🔹 Outcome of Phase 9**

Real-time insights into **student performance, fees, and course enrollments**.  
 Personalized views with **dynamic dashboards** for Admin, Faculty, and Students.  
 Strong **data security** via OWD, FLS, IP restrictions, and audit trails.