Phase 9: Reporting, Dashboards & Security Review

Travel and Tourism Management System (TTMS)

Objective

Phase 9 focuses on enabling stakeholders of TTMS to access insightful reports, visualize key metrics via dashboards, and ensure data security through comprehensive sharing and auditing mechanisms.

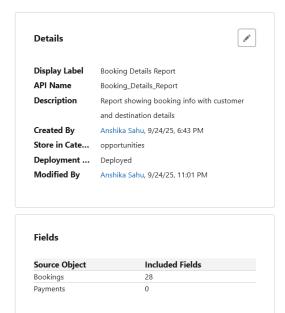
1. Report Types and Creation

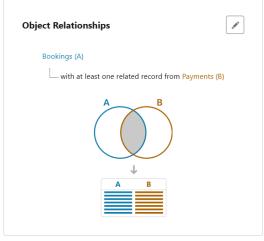
Purpose:

Define reusable report structures combining key objects like Booking, Customer, Tour Package for comprehensive reporting.

Steps:

- 1. Setup \rightarrow Report Types \rightarrow New Custom Report Type.
- 2. Primary Object: Booking_c
- 3. Report Type Label: Booking Details Report
- 4. Report Type Name (API): Booking_Details_Report
- 5. Description: Report showing booking info with customer and destination details
- 6. Category: Tourism Reports
- 7. Deployment Status: Deployed
- 8. Add Related Objects:
 - Booking_c (related via Booking_c)
 - Payment_c (related through Booking_c)





2. Reports

Purpose:

Create detailed and grouped reports to understand booking patterns, customer preferences, and package popularity.

Steps:

- 1. Reports → New Report.
- 2. Select Booking Overview Report.
- 3. Configure columns:
 - Booking Name: Booking__c.Name
 - Customer: Customer__c.Name
 - Tour Package Name: TourPackage__c.Name
 - Booking Date: Booking_c.Booking_Date__c
 - Status: Booking c.Status c
- 4. Add filters:
 - Booking Date range
 - Package Type
 - Customer Region
- 5. Save & Run report.

Reports Types:

- Tabular for simple lists.
- Summary for grouped metrics by customer or package.
- Matrix for cross-dimensional analytics.
- Joined reports to compare data from related objects.

3. Dashboards

Purpose:

Visualize key metrics for decision making like booking volumes, revenue, and package popularity.

Steps:

- 1. Dashboards → New Dashboard.
- 2. Name: Booking Performance Dashboard
- 3. Folder: Tourism Reports
- 4. Add components:
 - Pie Chart: Booking count per Tour Package
 - Bar Chart: Monthly bookings
 - Gauge: Booking Capacity utilization
- 5. Link each component to relevant report.
- 6. Save and run dashboard.

Tip:

Use Dynamic Dashboards to show data relative to user roles.

4. Sharing Settings

Purpose:

Ensure proper data visibility controls across users and roles in Salesforce.

Steps:

- 1. Setup → Sharing Settings.
- 2. Setup Organization-Wide Defaults:
 - Booking_c: Private
 - Customer_c: Controlled by Parent (Booking)
 - TourPackage__c: Public Read-Only
- 3. Define Sharing Rules:
 - Grant Managers access to their teams' bookings.

4. Use Role Hierarchy and Permission Sets for finer control.

5. Field Level Security

Purpose:

Protect sensitive fields from unauthorized access.

Steps:

- 1. Setup \rightarrow Profiles \rightarrow (select profile).
- 2. Field-Level Security → Edit.
- 3. Restrict exposure to fields like:
 - Booking__c.Payment_Details__c
 - Customer__c.Contact_Number__c
 - TourPackage__c.Cost__c
- 4. Save changes.

6. Session Settings and Login IP Ranges

Purpose:

Enhance org security by controlling login locations and session timeouts.

Steps:

- 1. Setup → Session Settings.
- 2. Configure session timeout durations.
- 3. Set Login IP Ranges for profiles or org-wide.
- 4. Implement Login Access Policies for sensitive user accounts.

7. Audit Trail

Purpose:

Maintain historical records of configuration and data model changes for compliance and troubleshooting.

Steps:

- 1. Setup → View Setup Audit Trail.
- 2. Review changes to objects, fields, profiles, sharing, and user permissions.
- 3. Export audit logs periodically for governance.

Summary

By implementing these reporting, dashboard, and security controls effectively, TTMS will provide actionable insights, protect sensitive data, and comply with organizational policies. This phase ensures scalable, secure, and data-driven decision-making capabilities for all stakeholders.

If you want, I can provide sample report filters, dashboard component setups, or security configuration screenshots for your specific org setup.