

# PHASE-9

## Report and Dashboards

I created all 4 types of reports : Tabular,Summary,Matrix and Joined .

### Tabular Report

The **'New Patients & Clinics Report'** is a Tabular Report that provides a straightforward list of patients with their clinic assignments and blood groups. It supports daily hospital operations by offering a quick reference for patient details, helping staff identify unassigned patients and assisting in emergency cases where blood group information is critical.

Report: Patients & Clinics New Patients & Clinics Report				
Total Records 56				
	First Name ▾	Last Name ▾	Clinic Name ▾	Blood_Group ▾
1	Jeremy	Conrad	-	A+
2	-	bhatt	-	O+
3	-	hari	-	A-
4	-	bhatt	-	A-
5	-	Mischell	-	O+
6	Hannah	Grace	MediBuddy	O-
7	Zia	Autrie	-	B+
8	Denney	Taig	WeCare	AB+
9	Cassey	St. Ledger	-	AB+
10	Patrica	Chessell	-	B-
11	Jule	Demelt	-	O+
12	Roselle	Dowderswell	-	A-
13	Marthena	Ruos	-	AB-
14	Therine	Oley	-	O-
15	Ringo	Snelgar	-	O-
16	Sander	Lackner	-	O-
17	Billy	Fairpool	WeCare	A+
18	Hollis	Hark	-	AB+
19	Maryanna	Burnall	-	AB-
20	Conn	Seely	-	A+
21	Dorolice	O'Concannon	-	A-
22	Betteann	Cowen	WeCare	A-
23	Merola	Humfrey	-	A+
24	Rosaline	Channer	-	O+
25	Mellie	Shere	-	O-
26	Carlo	Dillinton	-	B+

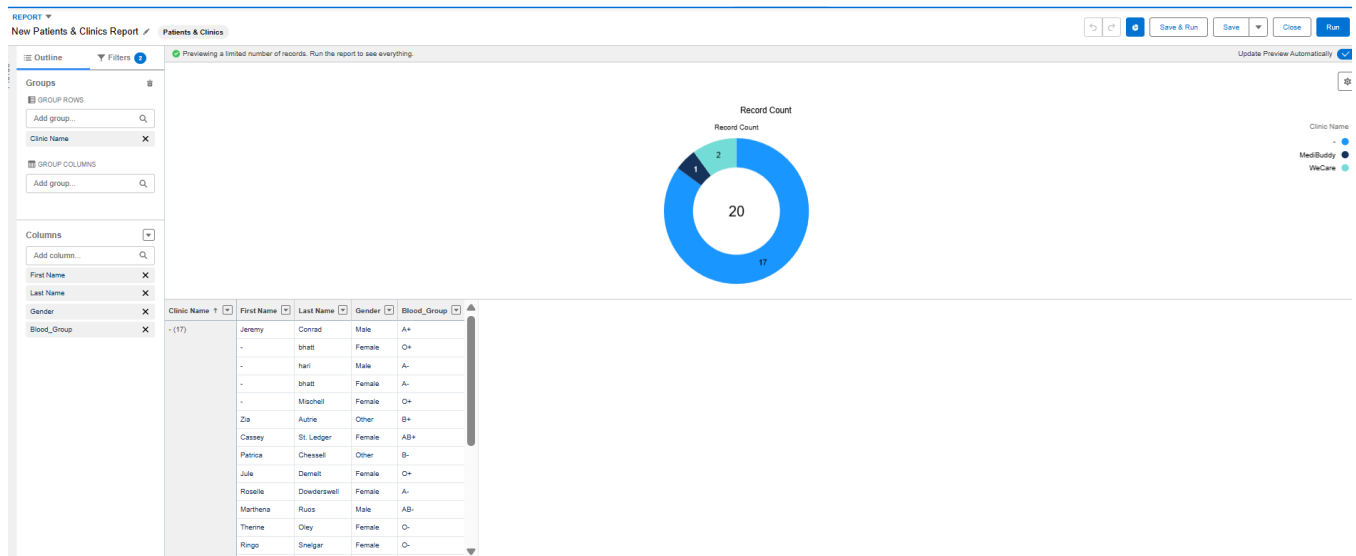
## Summary Report

Used whenever we need to see object being grouped per some field.

Eg: Patient per blood group, Patient per clinic

This report shows *How many patient belongs to which clinic?*

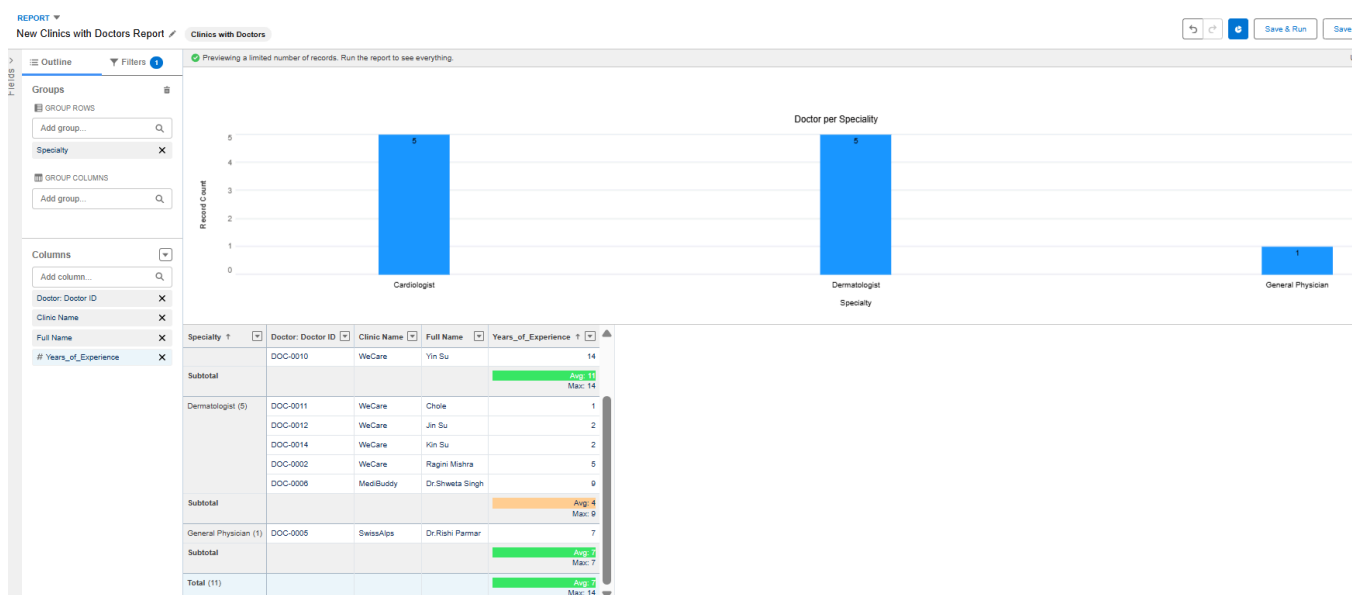
### Report1 ) Patient\_per\_Clinic



This is one more summary report that shows **doctors per specialty**. The new thing is that here I have used conditional formatting. We have a summary field, Years\_of\_Experience, for doctors, which here is summarized to show the average experience. The conditional Formatting is set to highlight this field as green and less than or equal to as .

Shows **distribution of doctors by specialty across clinics**

Helps **allocate doctors efficiently** based on specialty demand

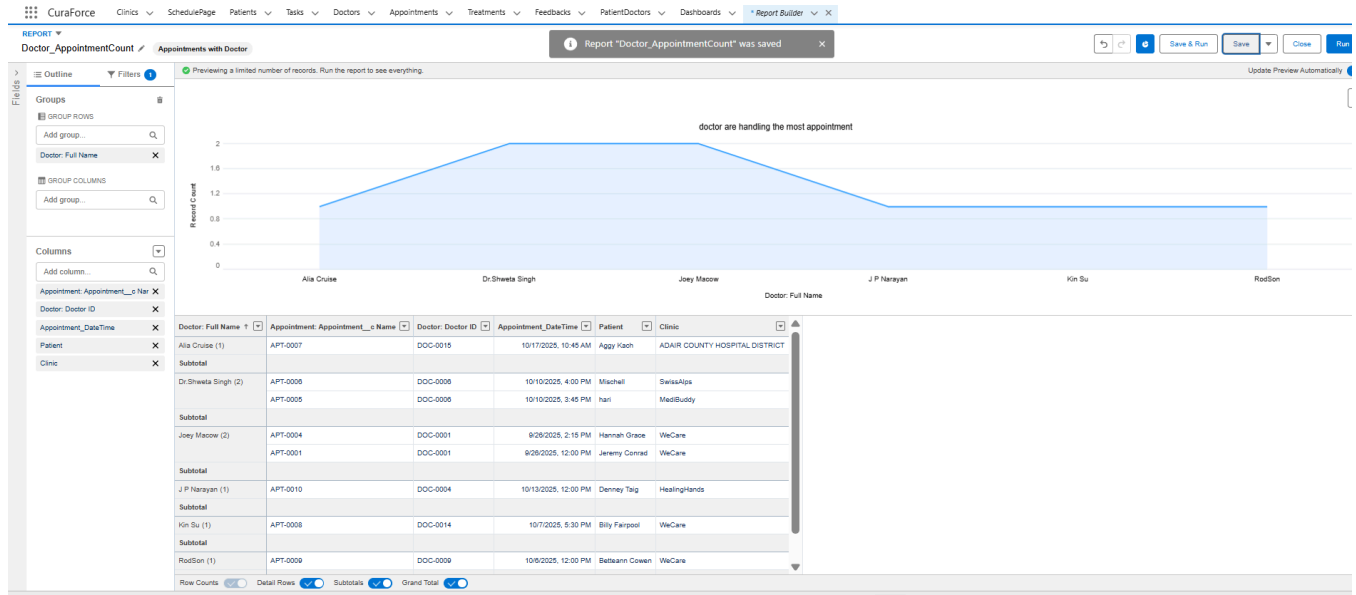


## Appointment\_per\_Doctor

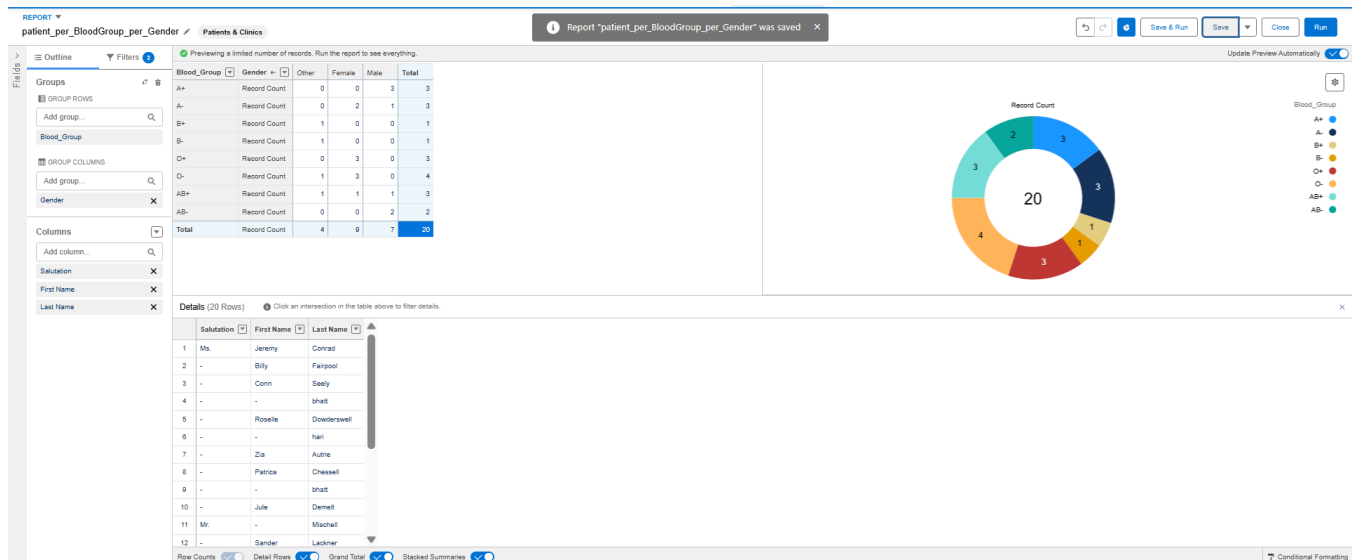
This report showcase Which doctor is Handling the most patients.

### Doctor Workload Monitoring

- Shows how many appointments each doctor has over a period
- Identify **overloaded or underutilized doctors**



**Matrix Report:** These are used to group records as per columns along with rows. This report showcases Patients\_per\_BloodGroup\_per\_Gender.



## Purpose & Insights:

### 1. Resource Planning for Blood Bank & Clinics

- Quickly see which blood groups have more patients
- Identify gender distribution per blood group → plan donations or stock levels accordingly

### 2. Targeted Health Campaigns

- If certain blood groups are more prevalent in female patients → campaigns or preventive programs can be tailored

### 3. Demographic Analysis

- Detect patterns: e.g., "O+ is dominant in males aged 19–35" → can guide clinic services or awareness programs

### 4. Operational Decisions

- Allocate staff and resources according to patient group sizes
- Anticipate demand for blood transfusions, screenings, or special care

### 5. Interactive Exploration

- Using **dashboard filters** (Clinic, Age Group), the viewer can drill down to a specific clinic or demographic segment

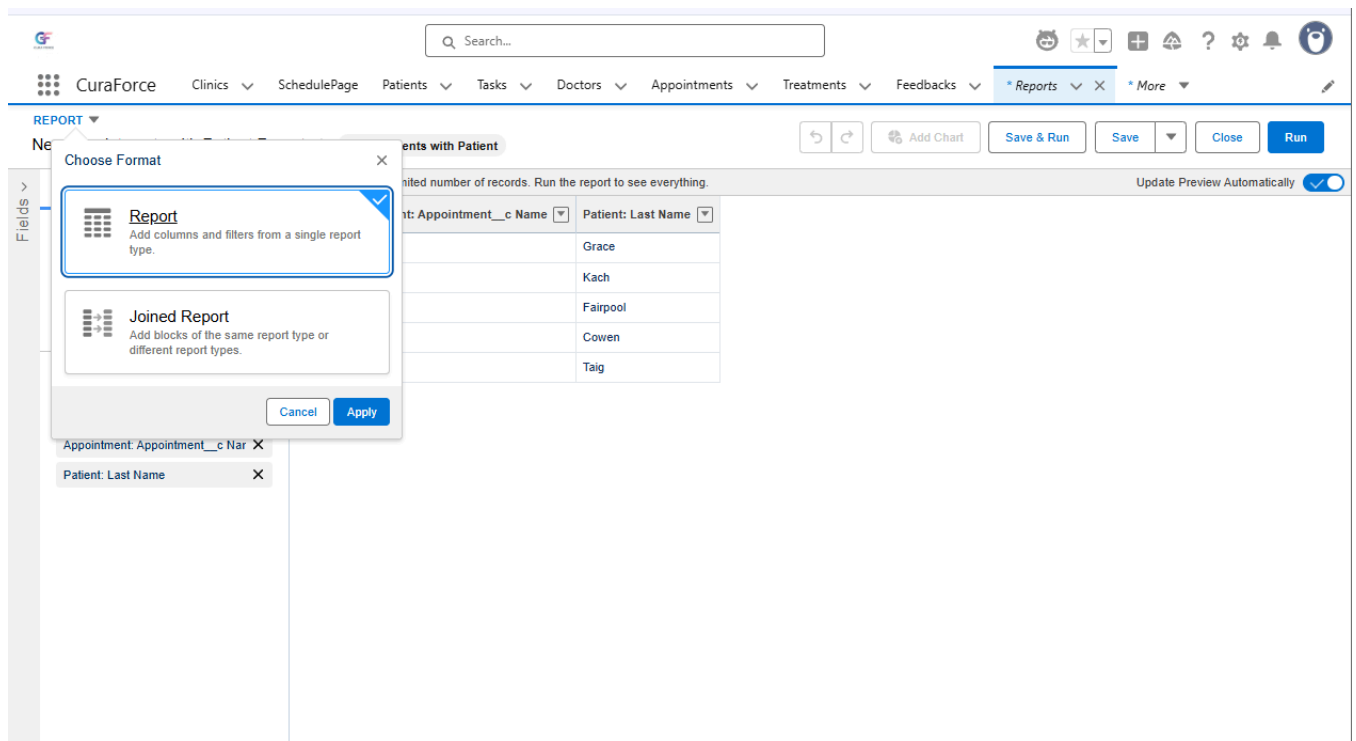
## Joined Report

Used to show results from two objects may or may not be related to each other.

Here I have used two blocks:

**Block 1:** Appointments with Treatment

**Block 2:** Appointments with Patient



### Block 1: Appointment with Treatment

- **Fields:** Appointment ID, Treatment Name, Doctor, Estimated Cost
- **Summary:** Count of Appointment ID, Sum of Estimated Cost

### Block 2: Appointment with Patient

- **Fields:** Appointment ID, Patient Last Name, Age, Gender.

# Insights

## Treatment Popularity & Revenue Tracking

Summarized **count of appointments per treatment** shows which treatments are most in demand

Summed **estimated cost per treatment** helps track revenue potential

## Patient Demographics for Each Treatment

Age and Gender distribution per treatment helps **target campaigns or preventive care programs**

Example: If physiotherapy mostly for seniors → plan age-specific resources

CuraForce

Clinics

SchedulePage

Patients

Tasks

Doctors

Appointments

Treatments

Feedbacks

PatientDoctors

Dashboards

New Appointments with D...

Analytics

JOINED REPORT

JoinedReportCF

Add Block

Save & Run

Save

Close

Run

Outline

Filters

Group Across Blocks

Add group...

Columns

Appointments with T...

Add column...

Appointment: Appointment\_c Name

Treatment: Treatment Name

Doctor

# EstimatedCost

Appointments with P...

Add column...

Appointment: Appointment\_c Name

Patient: Last Name

# Patient: Age

Patient: Gender

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

Appointments with Treatments				Appointments with Patient			
Appointments with Treatments block 1				Appointments with Patient block 1			
Appointment: Appointment_c Name	Treatment: Treatment Name	Doctor	EstimatedCost	Appointment: Appointment_c Name	Patient: Last Name	Patient: Age	Patient: Gender
1 APT-0005	TRT-0004	DOC-0006	5,000.00	APT-0004	Grace	31	Female
2 APT-0001	TRT-0005	DOC-0001	-	APT-0007	Kach	49	Other
3 APT-0004	TRT-0006	DOC-0001	500.00	APT-0008	Falpool	60	Male
4 APT-0005	TRT-0007	DOC-0006	-	APT-0009	Coven	39	Other
5				APT-0010	Taig	63	Other
6 Count: 4			5,500.00	Count: 5		Avg: 48	

# Dashboards

Implemented a **dynamic dashboard** to provide interactive insights into patient, doctor, and appointment data. The dashboard consolidates multiple reports and charts, including:

- **Doctors per Specialty**
- **Patients per Age Group and Gender** (Stacked Column Chart)
- **Patients by Blood Group** (Donut Chart)
- **Appointments per Doctor and Status** (Stacked Column Chart)

## Key Features Implemented

### 1. Dynamic Filters

- Filters such as **Clinic** and **Doctor Specialty** allow users to dynamically view relevant data across all components.
- Users can click on chart segments to drill down and filter other components interactively.

### 2. Dynamic Running User

- The dashboard is configured to **run as the logged-in user**, respecting **object-level and record-level security**.
- Each user only sees data they have access to based on **roles, profiles, and sharing rules**.

### 3. Object Security Awareness

- The dashboard respects **field-level security and object permissions**.
- Components display only the fields and records that the viewer has access to, demonstrating proper Salesforce security concepts.

### 4. Interactive and Insightful Visualization

- Visual charts make key metrics like **doctor workload, patient demographics, and appointment trends** easily understandable at a glance.
- The combination of summary, matrix, and tabular reports ensures a 360° view of clinic operations.



CuraForce Clinics SchedulePage Patients Tasks Doctors Appointments Dashboards More

CF Dashboard + Widget + Filter X Save

### Properties

\* Name

CF Dashboard

Description

Folder

CuraForce Select Folder

This dashboard is owned by anushka bhatt

View Dashboard As

☐ Me

☐ Another person

☒ The dashboard viewer

☐ Let dashboard viewers choose whom they view the dashboard as

Dashboard Grid Size

☒ 12 columns (recommended)

☐ 9 columns

Dashboard Theme

☒ Light

☐ Dark

Cancel Save