

Phase 9: Reporting, Dashboards & Security Review

Goal:

- Track progress through reports and dashboards
- Protect sensitive data from unauthorized access
- Ensure stakeholders see the right information in real time

Step 1: Reporting

Reports help track patient, genetic test, samples, doctors effectively.

A. Create Reports

1. Go to **App Launcher** → **Reports** → **New Report**
2. Select the report type: e.g., **Genetic Test** or **Custom Report**
3. Add fields like Genetic Test (Genetic_Test__c), Patient (Patient__c)
4. Save & Run the report

Smart BioTech Labs

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Report: Genetic Tests

Genetic Tests by Status

Enable Field Editing

QAdd Chart

FilterCopyEdit

Total Records2

Total Turnaround Days12

Total Cost\$23,000

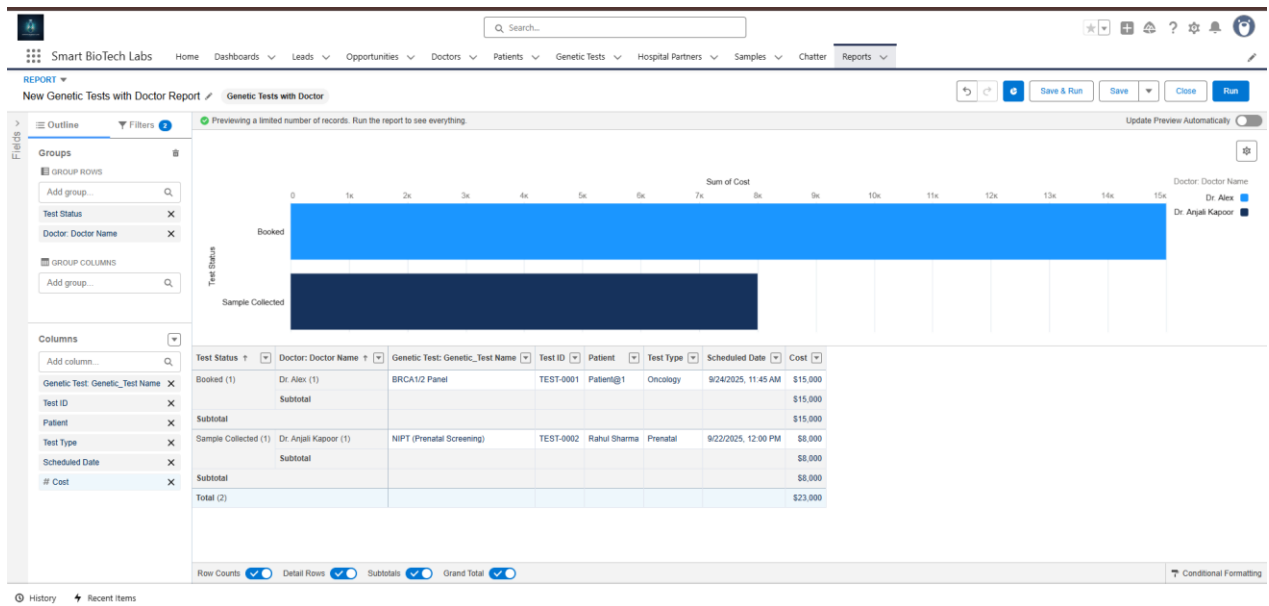
Test Status	Genetic Test: Genetic_Test Name	Test ID	Doctor	Patient	Test Type	Scheduled Date	Turnaround Days	Cost
Booked (1)	BRCA1/2 Panel	TEST-0001	Dr. Alex	Patient1	Oncology	9/24/2025, 11:45 AM	5	\$16,000
Subtotal							5	\$16,000
Sample Collected (1)	NIPT (Prenatal Screening)	TEST-0002	Dr. Anjali Kapoor	Rahul Sharma	Prenatal	9/22/2025, 12:00 PM	7	\$8,000
Subtotal							7	\$8,000
Total (2)							12	\$23,000

Row Counts

Detail Rows

Subtotals

Grand Total

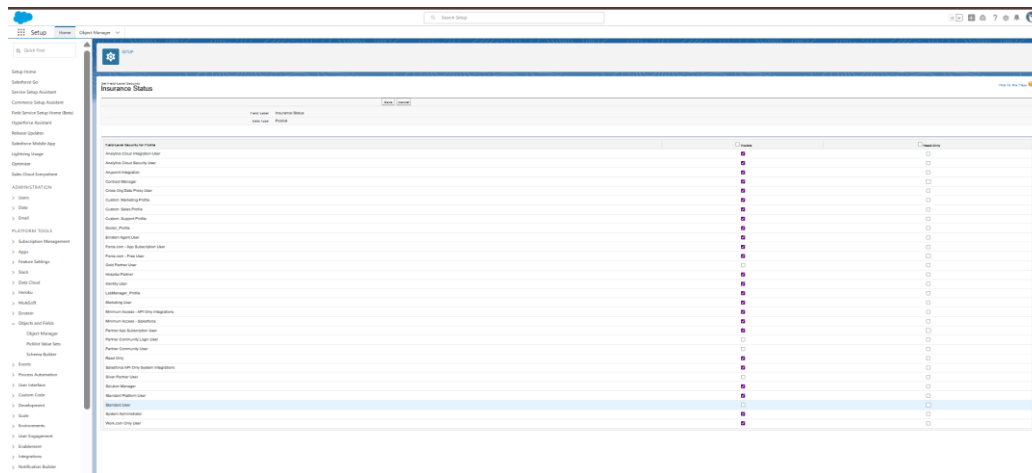


Step 2: Dashboards

Dashboards visually display metrics from reports.

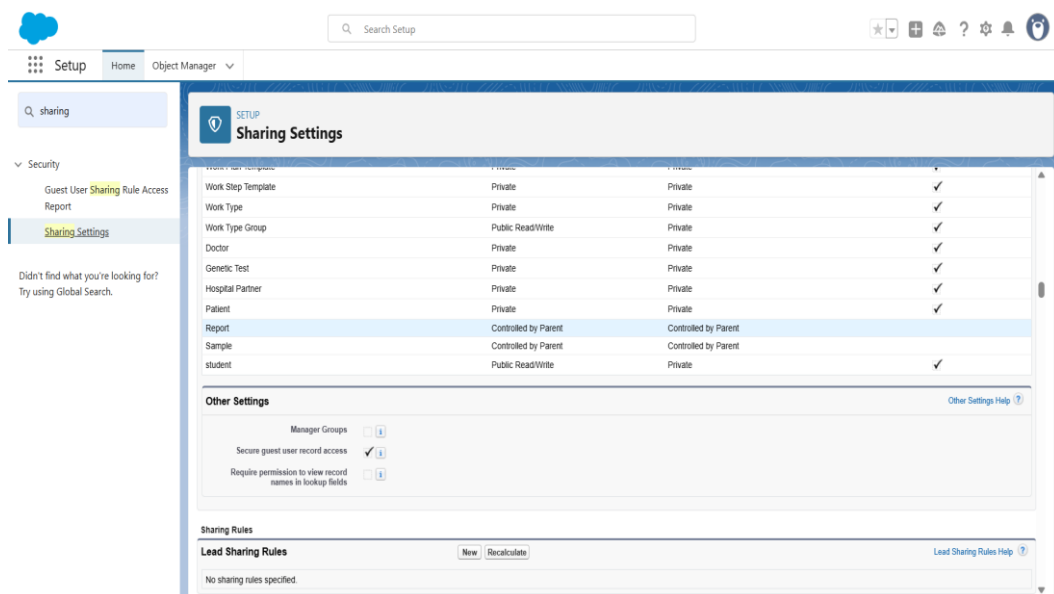
A. Create Dashboard

1. Go to **App Launcher** → **Dashboards** → **New**
2. Add components:
 - **Donut Chart:** Genetic Test By Status
 - **Horizontal Bar Chart:** Genetic Test by Status
 - **Vertical Bar Chart:** Genetic Test by Doctors
3. Enable **Dynamic Dashboards** → Set **“View Dashboard As = Dynamic”**



B. Sharing & Org-Wide Defaults (OWD)

1. Setup → Sharing Settings



C. Audit Trail

1. Setup → View Setup Audit Trail
2. Track unauthorized changes or admin activity



Setup

Home

Object Manager

Search Setup



audit

Security

View Setup Audit Trail

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View Setup Audit Trail

View Setup Audit Trail

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The last 20 entries for your organization are listed below. You can [download](#) your organization's setup audit trail for the last six months (Excel .csv file).

View Setup Audit Trail					
Date	User	Source Namespace Prefix	Action	Section	Delegate User ?
9/28/2025, 10:22:19 AM PDT	atharvaud773712@agentforce.com		Genetic Test matching rule, GeneticTest_BlockOnTestID matching rule, activating by Atharv Raut	Matching Rule	
9/27/2025, 1:38:38 PM PDT	atharvaud773712@agentforce.com		Changed developer name of custom app from Smart_BioTech_Labs to Smart_BioTech_Lab	Custom Apps	
9/27/2025, 1:38:38 PM PDT	atharvaud773712@agentforce.com		Changed label of custom app from Smart BioTech Labs to Smart BioTech Lab	Custom Apps	
9/27/2025, 11:38:04 AM PDT	atharvaud773712@agentforce.com		Deactivated flow version #1 "Sample Collection Notification" for flow with Unique Name "Sample_Collection_Notification"	Flows	
9/27/2025, 11:37:52 AM PDT	atharvaud773712@agentforce.com		Activated flow version #2 "Sample Collection Notification" for flow with Unique Name "Sample_Collection_Notification"	Flows	
9/27/2025, 2:34:41 AM PDT	atharvaud773712@agentforce.com		Created flow version #2 "Sample Collection Notification" for flow with Unique Name "Sample_Collection_Notification"	Flows	
9/27/2025, 2:09:38 AM PDT	atharvaud773712@agentforce.com		Changed Genetic Test page layout Genetic Test Layout	Custom Objects	
9/27/2025, 2:05:00 AM PDT	atharvaud773712@agentforce.com		Changed Patient page layout Basic Info	Custom Objects	
9/27/2025, 1:59:53 AM PDT	atharvaud773712@agentforce.com		Changed Sample page layout Basic Info	Custom Objects	
9/27/2025, 1:53:35 AM PDT	atharvaud773712@agentforce.com		Changed Sample page layout Sample Layout	Custom Objects	
9/27/2025, 12:55:19 PM PDT	atharvaud773712@agentforce.com		Deleted custom field Primary Doctor from Patients	Custom Objects	
9/26/2025, 12:40:12 PM PDT	atharvaud773712@agentforce.com		Changed tabs of custom app Smart BioTech Labs	Custom Apps	
9/26/2025, 12:39:57 PM PDT	atharvaud773712@agentforce.com		Changed tabs of custom app Smart BioTech Labs	Custom Apps	
9/26/2025, 12:39:11 PM PDT	atharvaud773712@agentforce.com		Changed Lightning Page: Smart BioTech Labs UtilityBar	Lightning Pages	
9/26/2025, 12:34:12 PM PDT	atharvaud773712@agentforce.com		Added value Confirmed to Test Status picklist with color Assigned dynamically on Genetic Tests	Custom Objects	
9/26/2025, 12:25:26 PM PDT	atharvaud773712@agentforce.com		Deleted flow version #2 "FLW_Welcome_Patient" for flow with Unique Name "FLW_Welcome_Patient"	Flows	
9/26/2025, 12:22:17 PM PDT	atharvaud773712@agentforce.com		Deactivated flow version #3 "FLW_Welcome_Patient" for flow with Unique Name "FLW_Welcome_Patient"	Flows	
9/26/2025, 12:22:17 PM PDT	atharvaud773712@agentforce.com		Activated flow version #4 "FLW_Welcome_Patient" for flow with Unique Name "FLW_Welcome_Patient"	Flows	
9/26/2025, 12:20:28 PM PDT	atharvaud773712@agentforce.com		Created flow version #4 "FLW_Welcome_Patient" for flow with Unique Name "FLW_Welcome_Patient"	Flows	